Results of a Survey on Exchange Online and Office 365 Migration and Deployment

An Osterman Research Industry Survey Report

June 2016

OSTERMANRESEARCH

FIGURES IN THIS REPORT

*Results of a
Survey on
Exchange Online
and Office 365
Migration and
Deployment*

OVERVIEW

The use of Exchange Online and Office 365 across the globe is growing rapidly, driven by the intense sales focus of Microsoft and its business partners, along with a clear value proposition for organizations of all sizes. While the uptake of Exchange Online is leading the early growth charge, there are significant opportunities for organizations to leverage the many other components of Office 365 to re-invent productivity.

In this survey report, produced in support of a white paper that Osterman Research has published entitled, *Microsoft to Exchange Online and Office 365: A Step-by-Step Guide*, we present the results of the survey that was conducted for the white paper.

ABOUT THIS INDUSTRY SURVEY REPORT

This survey report presents the results of a primary market research survey conducted with members of the Osterman Research survey panel during May 2016. The survey was conducted with 106 members of the panel in mid-sized and large organizations, primarily in North America. Here are the key details of the survey:

- Mean number of employees at the organizations surveyed: 10,117

- Mean number of email users at the organizations surveyed: 10,545

A wide range of industries were represented among the organizations surveyed for this report.

RESEARCH FINDINGS

Figure 1
Percentage of Users by On-Premises Email System, 2016 and 2017
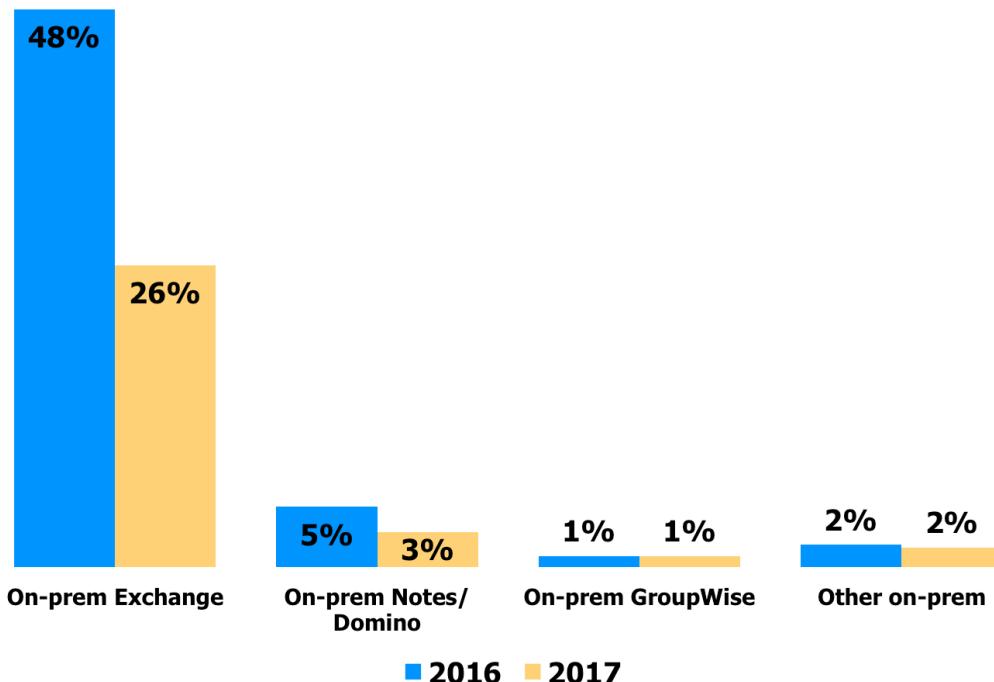
Source: Osterman Research, Inc.

Figure 2
Percentage of Users by Cloud-Based Email System, 2016 and 2017
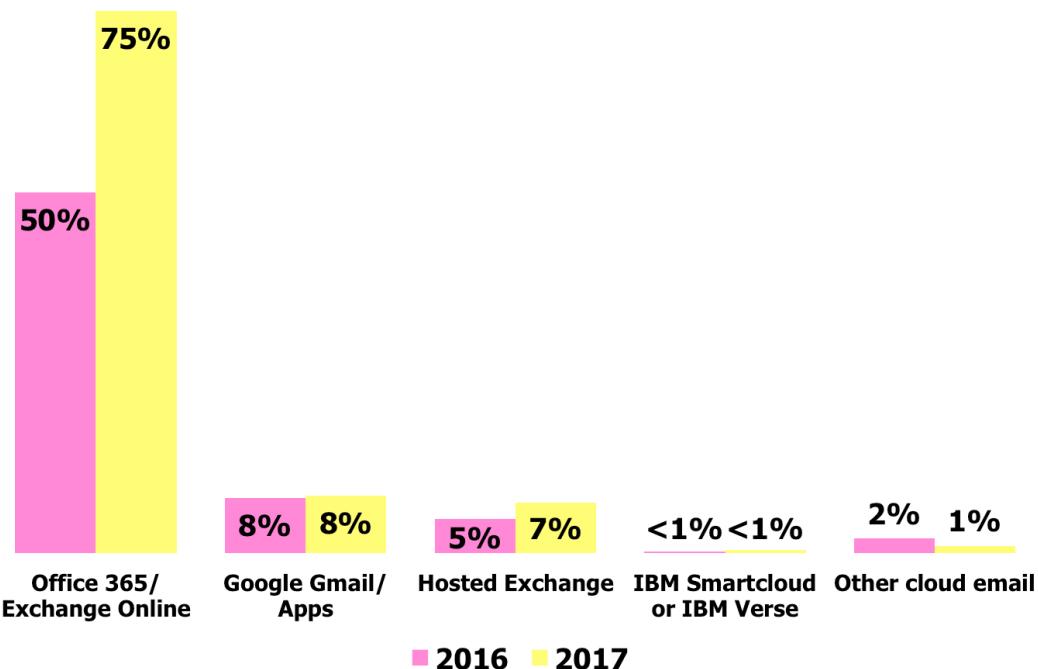
Source: Osterman Research, Inc.

Figure 3
Views on the Need for Third Party Offerings in Office 365 Environments
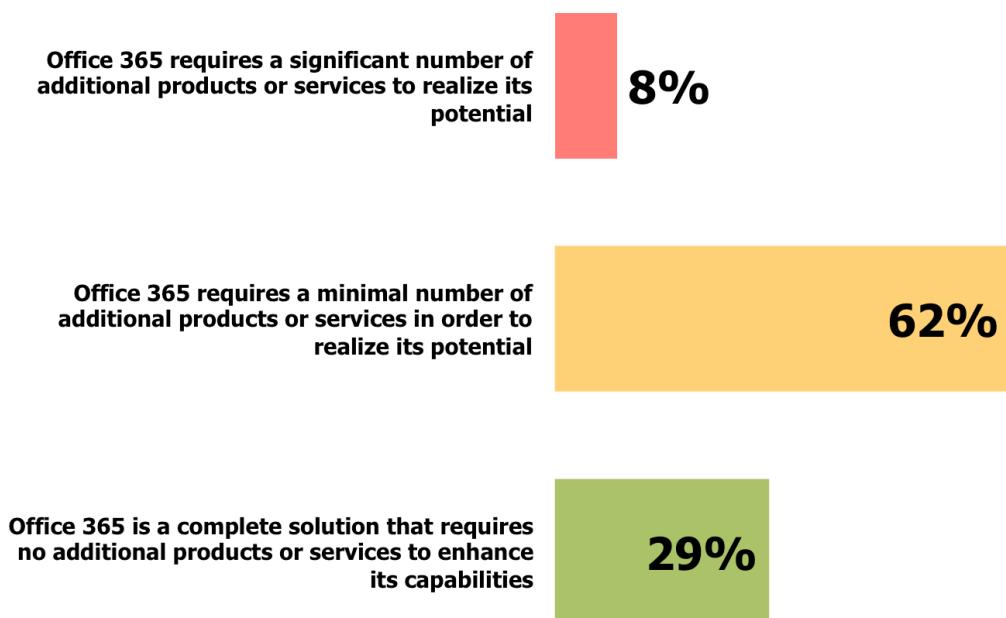
Source: Osterman Research, Inc.

Figure 4
Long-Term Deployment Plans for Key Communication and Collaboration Platforms

| Platform	All On-Premises	All Cloud-Based	Hybrid
Web security	25%	21%	54%
Backup	24%	25%	51%
Desktop productivity applications (e.g., Office)	19%	23%	58%
Archiving for eDiscovery/compliance purposes	16%	49%	35%
SharePoint or a similar platform	13%	53%	34%
Email security (anti-spam, anti-malware, anti-phishing, etc.	13%	41%	45%
Email encryption	13%	45%	42%
Email	8%	55%	37%

Source: Osterman Research, Inc.

Figure 5
Solutions Implemented to Support the Migration to Office 365

Migration of content from existing email archives	**64%**
Migration of content from PST files	**64%**
Migration of content from files shares	**48%**
Discovery of .PST files on our enterprise network	**44%**
Migration of content from on-premises SharePoint	**35%**
Migration of content from third-party sync and share services	**18%**
Migration of content from a data backup solution	**16%**
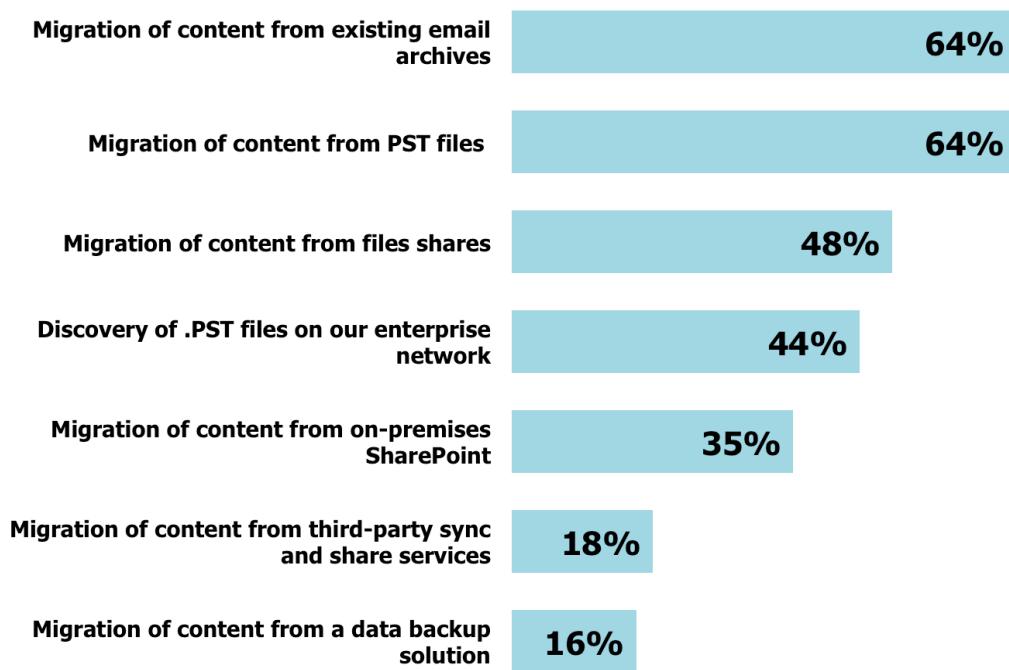
Source: Osterman Research, Inc.

Figure 6
Solutions That Have Been Implemented to Support Ongoing Use of Office 365

|	
Email filtering to protect against spam, malware, phishing, and other email security threats	72%
Email encryption	54%
Apps for computers and mobile devices for accessing content in Office 365	47%
Advanced threat-detection capabilities	43%
Audio conferencing services for Lync Online or Skype for Business	35%
Creating a secondary archive of email external to Office 365	30%
Spooling of inbound email to provide high availability for Office 365	26%
A backup and recovery tool	24%
Advanced data loss protection capabilities	20%
Software for designing and executing automated workflows in Office 365	13%
Software for collecting and managing a long-term data archive in Azure	11%

Source: Osterman Research, Inc.

Figure 7
Drivers for the Use of Office 365
% Responding Important or Extremely Important

Streamline IT operations	61%
Reduce the cost of delivering services	54%
Drive user productivity	53%
Enable agility in a changing operating environment	48%
Gain certainty over costs	46%
Improve organizational communication	44%

Source: Osterman Research, Inc.

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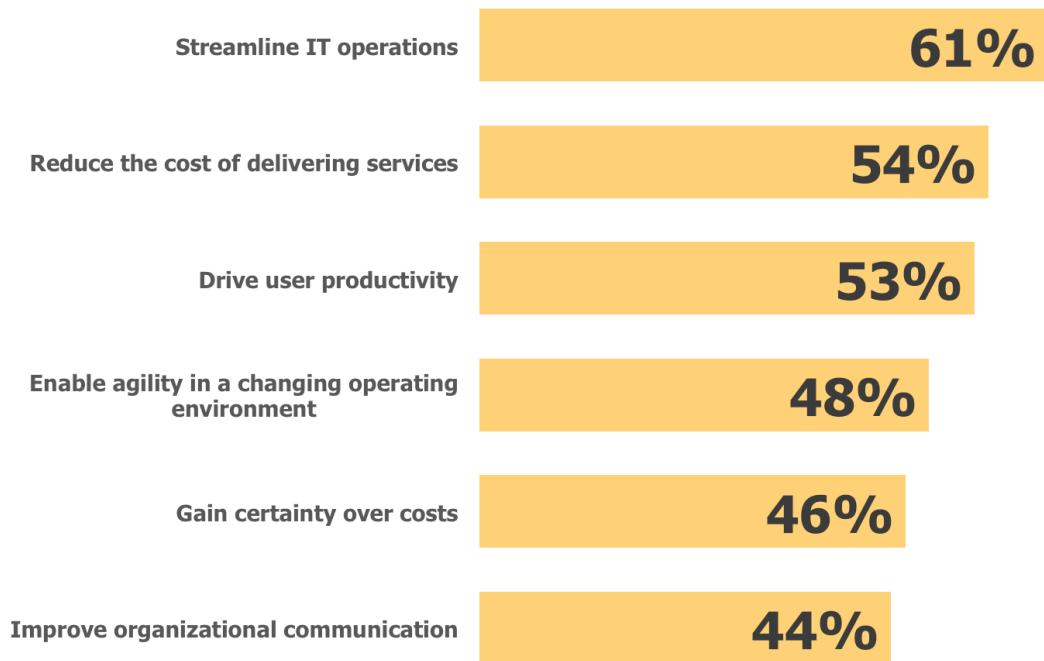
Figure 8
Content That Has Been Ingested/Migrated Into Office 365

Category	Percentage
Existing .PST files	**70%**
Content from existing on-premises email archiving solutions	**51%**
Databases from non-Microsoft on-premises email systems	**29%**
Content from existing, non-Microsoft cloud-based email systems	**28%**
Content from existing cloud-based email archives	**18%**
Other	**5%**
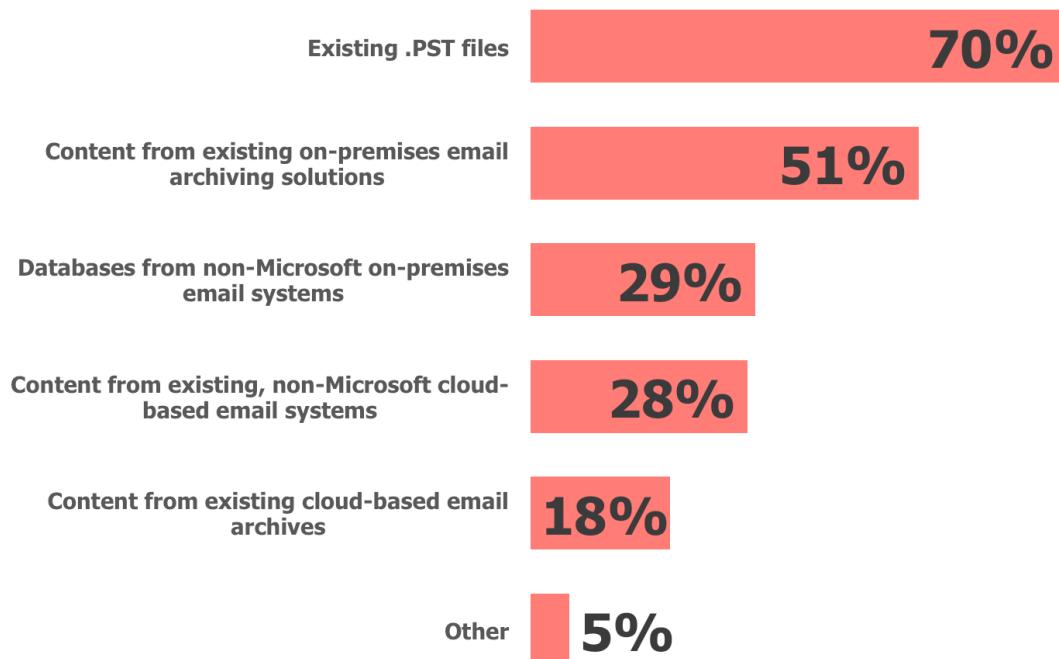
Source: Osterman Research, Inc.

Figure 9
Backups Models for Non-Exchange Online or Non-Office 365 Data Sources

Backup Model	Email	Files	Content from Collaboration Systems	Other Content
Individuals back up their own data on-premises	19%	30%	16%	26%
Individuals back up their own data to the cloud	11%	19%	14%	18%
IT backs up to on-premises backup systems	61%	74%	65%	66%
IT backs up to cloud-based backup	30%	35%	34%	30%
We do not back up	15%	2%	10%	10%

Source: Osterman Research, Inc.

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Figure 10
Backups Models for Exchange Online or Office 365 Data Sources

Backup Model	Email	Files	Content from Collaboration Systems	Other Content
Individuals back up their own data on-premises	15%	19%	13%	21%
Individuals back up their own data to the cloud	13%	22%	20%	21%
IT backs up to on-premises backup systems	34%	53%	48%	49%
IT backs up to cloud-based backup	46%	45%	40%	40%
We do not back up	26%	14%	22%	21%

Source: Osterman Research, Inc.

Figure 11
**Plans for eDiscovery- and Legal-Related Compliance Archiving and Backup in Office 365**
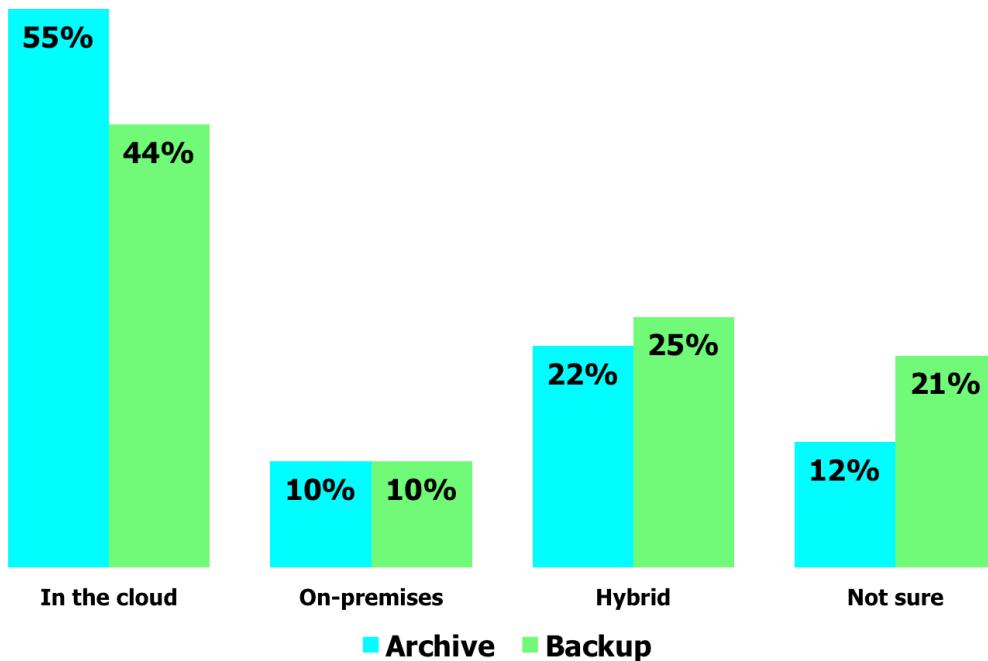
Source: Osterman Research, Inc.

Figure 12
**Approach That Would be Taken for Migrating to Exchange Online or Office 365**

- Migrate all legacy email archive data to Exchange Online/Office 365
- Migrate selected email archive data to Exchange Online/Office 365
- Maintain the old email archive solution and use Exchange Online/Office 365 only for new content
- Not sure
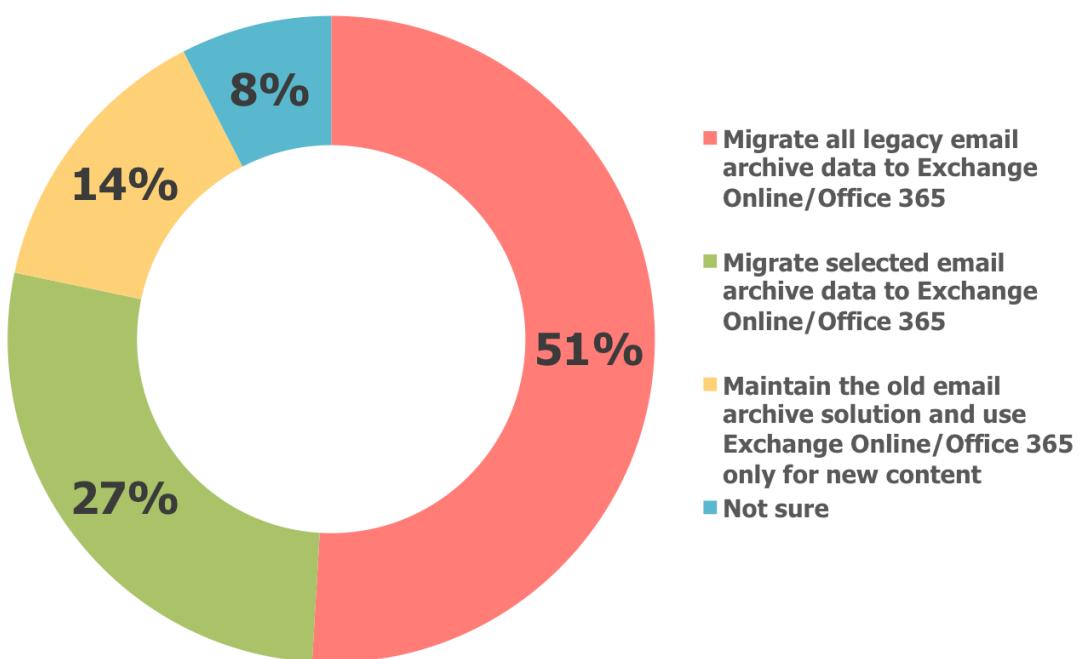
Source: Osterman Research, Inc.

Figure 13
**Views on How Well Office 365 Archiving Capabilities Will Meet Organization Requirements for Archiving**

Source: Osterman Research, Inc.

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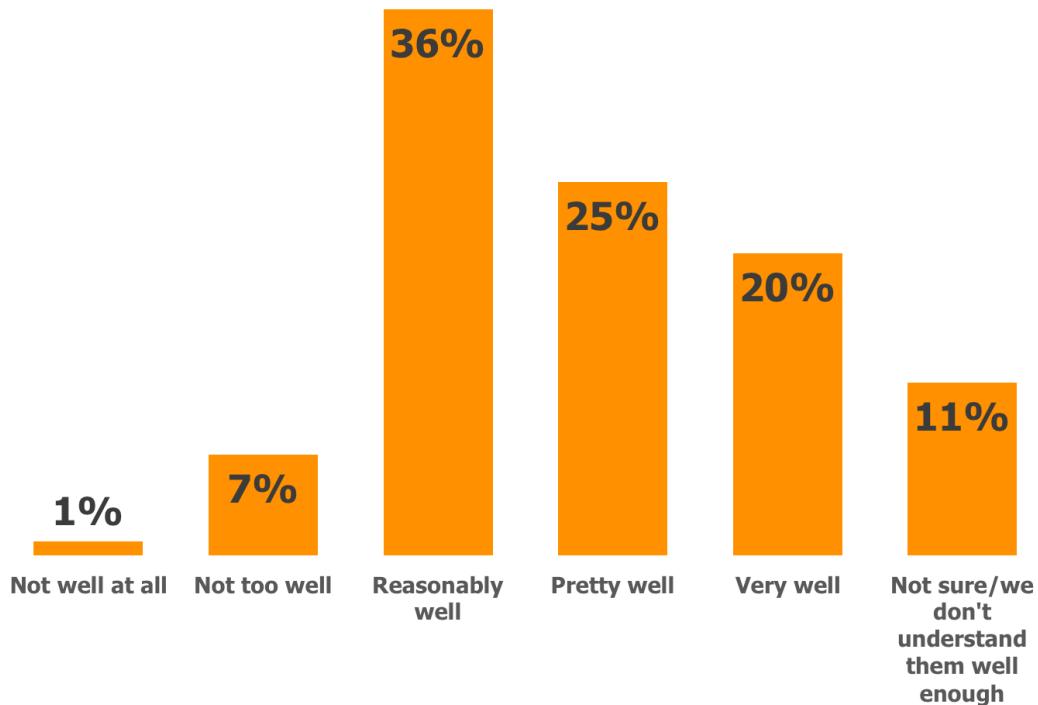
Figure 14
Confidence in Office 365's Native Security Capabilities
% Responding Confident or Extremely Confident

	Little/No Confidence	Some Confidence	Confident/Extremely Confident
Email encryption	3%	43%	54%
Audio conferencing services for Lync Online/ Skype for Business	8%	54%	38%
Advanced data loss protection capabilities	5%	59%	37%
Advanced threat detection capabilities	8%	56%	37%
Creating a secondary archive of email external to Office 365	6%	60%	34%

■ Little/No Confidence ■ Some Confidence ■ Confident/Extremely Confident

Source: Osterman Research, Inc.

Figure 15
Views on How Well Native Email Security Capabilities in Office 365 Will Meet Organizational Requirements

Not well at all	Not too well	Reasonably well	Pretty well	Very well	Not sure/we don't understand them well enough
1%	7%	30%	30%	29%	5%
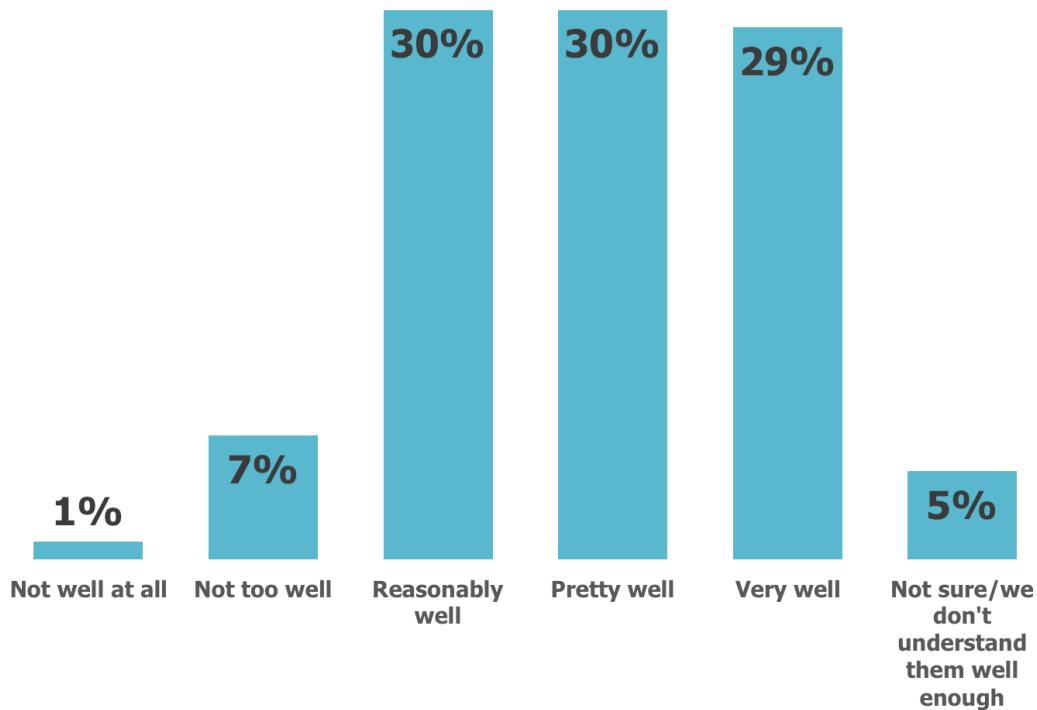
Source: Osterman Research, Inc.

Figure 16
"Do you believe that Office 365's built-in option for email encryption provides sufficient security for your email encryption needs?"

Source: Osterman Research, Inc.