Results of a Survey on Hybrid Cloud Deployment
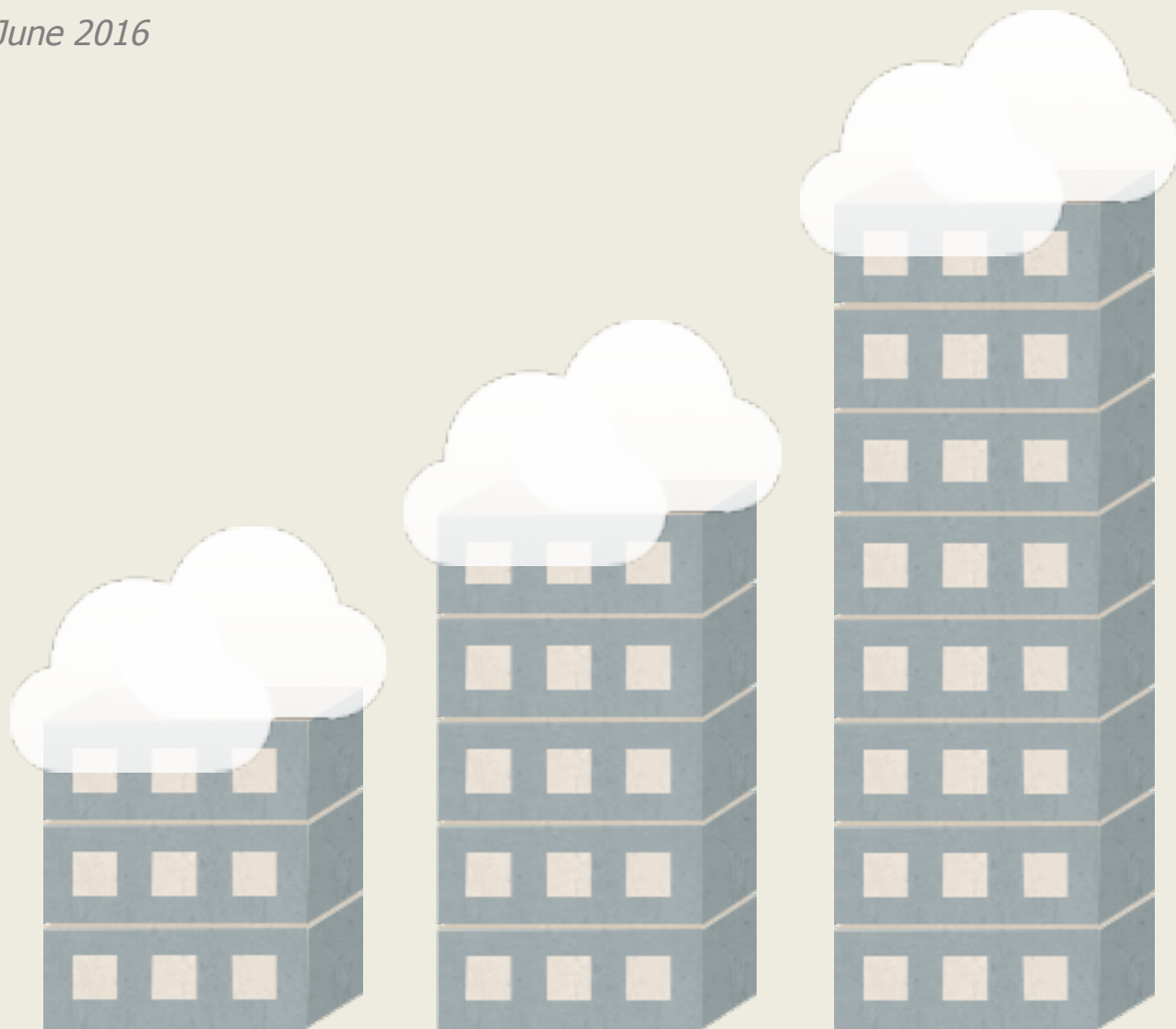
An Osterman Research Industry Survey Report

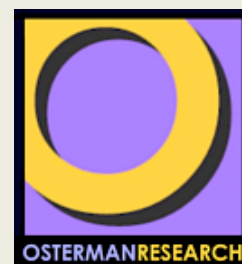*June 2016*

OSTERMANRESEARCH

FIGURES IN THIS REPORT

OVERVIEW

When we think about "the cloud," it's natural to focus on *public* clouds. But public is not the only type of cloud. Public clouds use proven technology to pool data center resources and help maximize their computing potential. These same principles can be used in your data center, either on your premises or on one that you exclusively rent from someone else, to create a private cloud. This technology also gives you the flexibility to mix and match; allowing you to choose where an application is hosted, and to move it later.

This then is the essence of hybrid cloud: With the benefit of cloud technology, you can move workloads between public and private clouds — or choose a combination of the two.

For more information, please see the white paper *The What, the Why and the How of Hybrid Cloud*, published by Osterman Research in May 2016.

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 March. The survey was conducted with 165 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: 16,604
- Mean number of email users at the organizations surveyed: 14,395 (87% of employees)

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

RESEARCH FINDINGS

Figure 1
Parts of the Application Lifecycle With Which Decision Makers Would and Would Not Be Comfortable Hosting in a Public Cloud
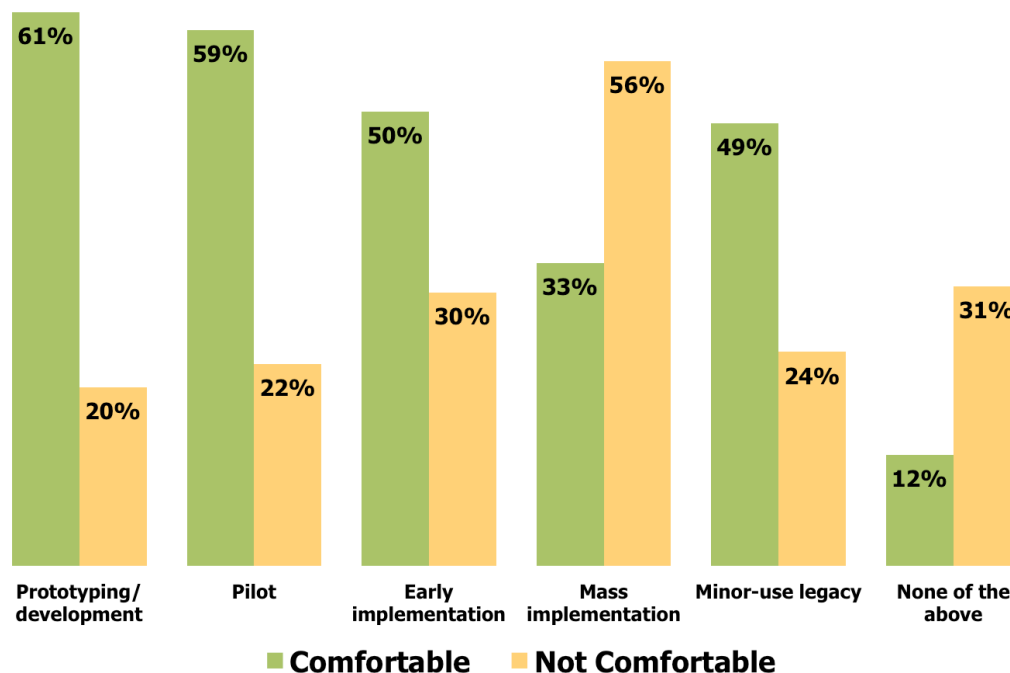
Source: Osterman Research, Inc.

Figure 2
Deployment Models for Key IT Capabilities, 2016

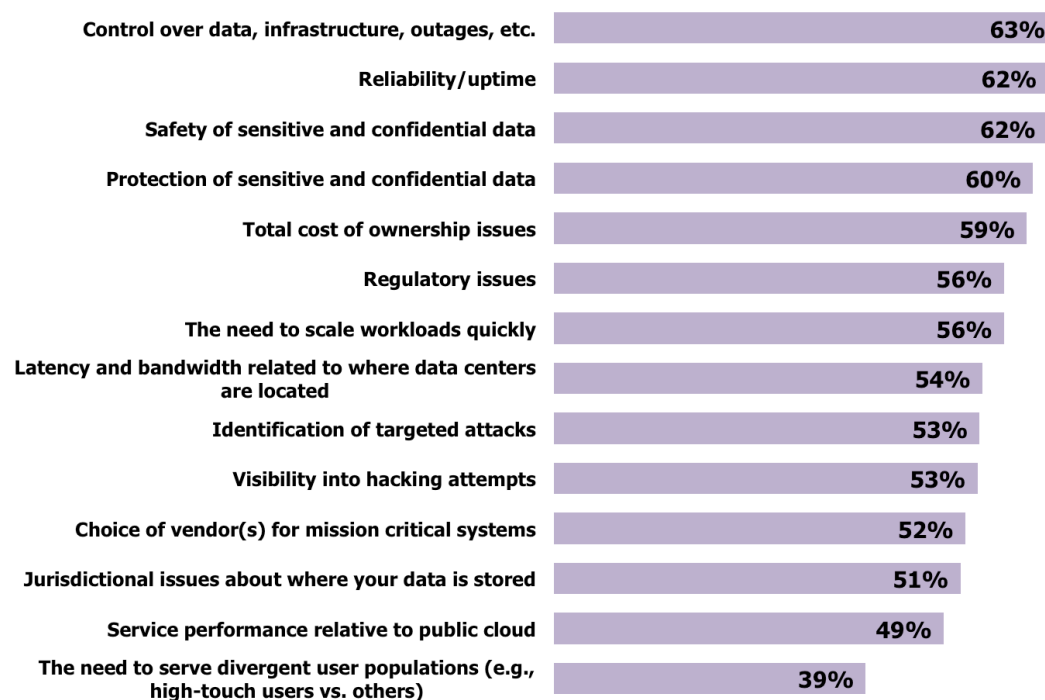|	On-Premises	Public Cloud	Private Cloud	Hybrid Cloud	N/A
Email	62%	28%	17%	7%	1%
File sharing	69%	26%	20%	10%	1%
Chat/instant messaging	43%	32%	13%	6%	16%
Online meetings	37%	51%	19%	7%	7%
Collaboration	52%	32%	23%	10%	10%
Email security	63%	30%	19%	8%	1%
Web security	76%	15%	16%	10%	2%

Source: Osterman Research, Inc.

Figure 3
Deployment Models for Key IT Capabilities, 2018

	On-Premises	Public Cloud	Private Cloud	Hybrid Cloud	N/A
Email	34%	39%	27%	17%	0%
File sharing	42%	36%	33%	18%	0%
Chat/instant messaging	25%	42%	24%	13%	8%
Online meetings	20%	59%	23%	14%	2%
Collaboration	29%	43%	26%	18%	3%
Email security	35%	37%	24%	18%	2%
Web security	50%	27%	23%	18%	3%

Source: Osterman Research, Inc.

Figure 4
Drivers That Impact the Decision to Move an Application to a Private Cloud
% Responding a Positive or Strongly Positive Driver

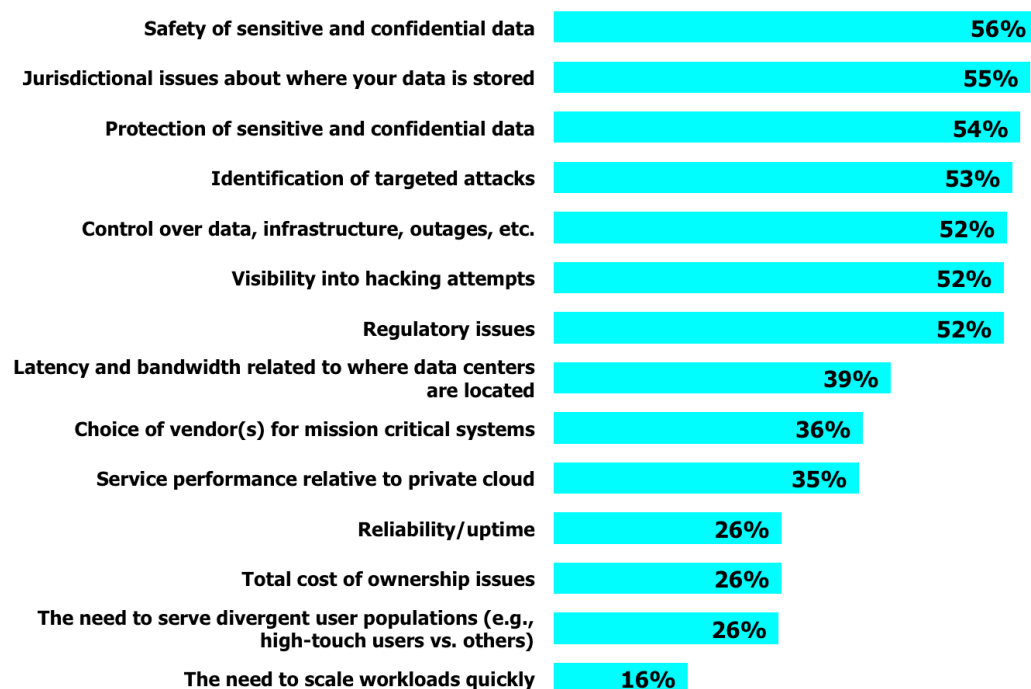|	
Control over data, infrastructure, outages, etc.	63%
Reliability/uptime	62%
Safety of sensitive and confidential data	62%
Protection of sensitive and confidential data	60%
Total cost of ownership issues	59%
Regulatory issues	56%
The need to scale workloads quickly	56%
Latency and bandwidth related to where data centers are located	54%
Identification of targeted attacks	53%
Visibility into hacking attempts	53%
Choice of vendor(s) for mission critical systems	52%
Jurisdictional issues about where your data is stored	51%
Service performance relative to public cloud	49%
The need to serve divergent user populations (e.g., high-touch users vs. others)	39%

Source: Osterman Research, Inc.

Figure 5
Drivers That Impact the Decision to Move an Application to a Public Cloud
% Responding a Positive or Strongly Positive Driver

Driver	%
Safety of sensitive and confidential data	56%
Jurisdictional issues about where your data is stored	55%
Protection of sensitive and confidential data	54%
Identification of targeted attacks	53%
Control over data, infrastructure, outages, etc.	52%
Visibility into hacking attempts	52%
Regulatory issues	52%
Latency and bandwidth related to where data centers are located	39%
Choice of vendor(s) for mission critical systems	36%
Service performance relative to private cloud	35%
Reliability/uptime	26%
Total cost of ownership issues	26%
The need to serve divergent user populations (e.g., high-touch users vs. others)	26%
The need to scale workloads quickly	16%

Source: Osterman Research, Inc.

Figure 6
Methods That Would Be Used to Deploy a Critical, Customer-Facing Application Initially

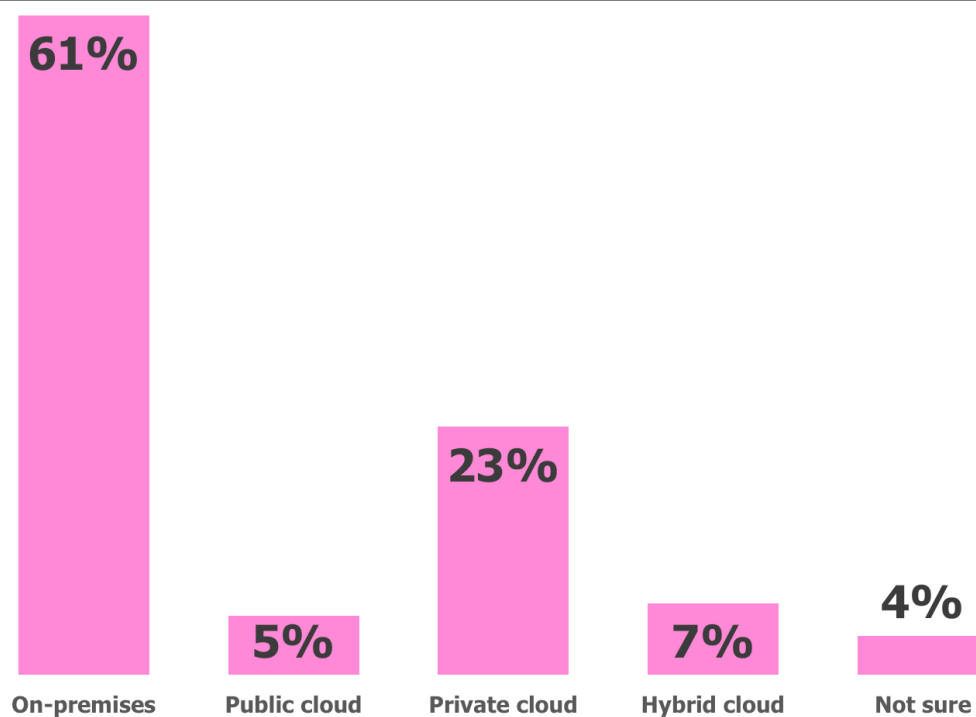| Method	%
On-premises	55%
Public cloud	11%
Private cloud	20%
Hybrid cloud	9%
Not sure	5%
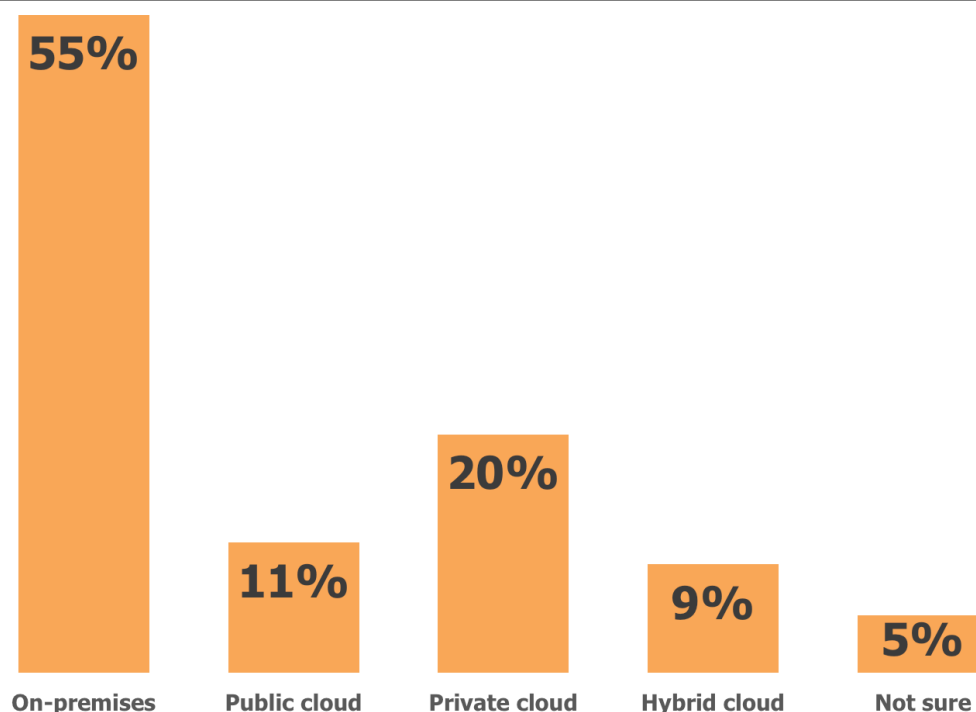
Source: Osterman Research, Inc.

Figure 7
Methods That Would Be Used to Deploy a Critical, Customer-Facing Application Once It Was Thoroughly Vetted and Fully Operational
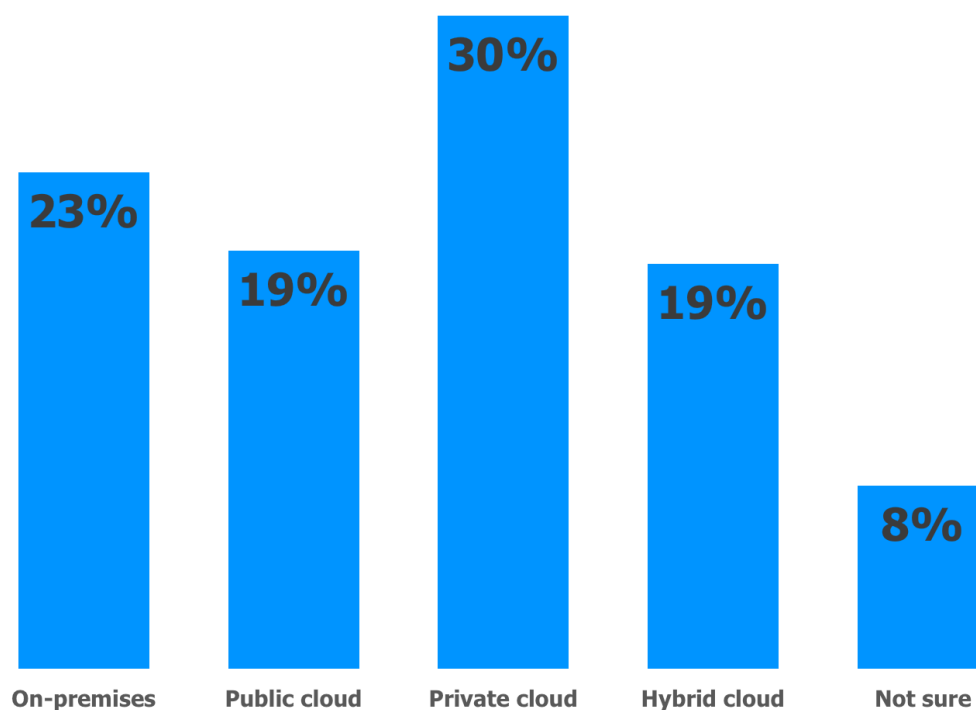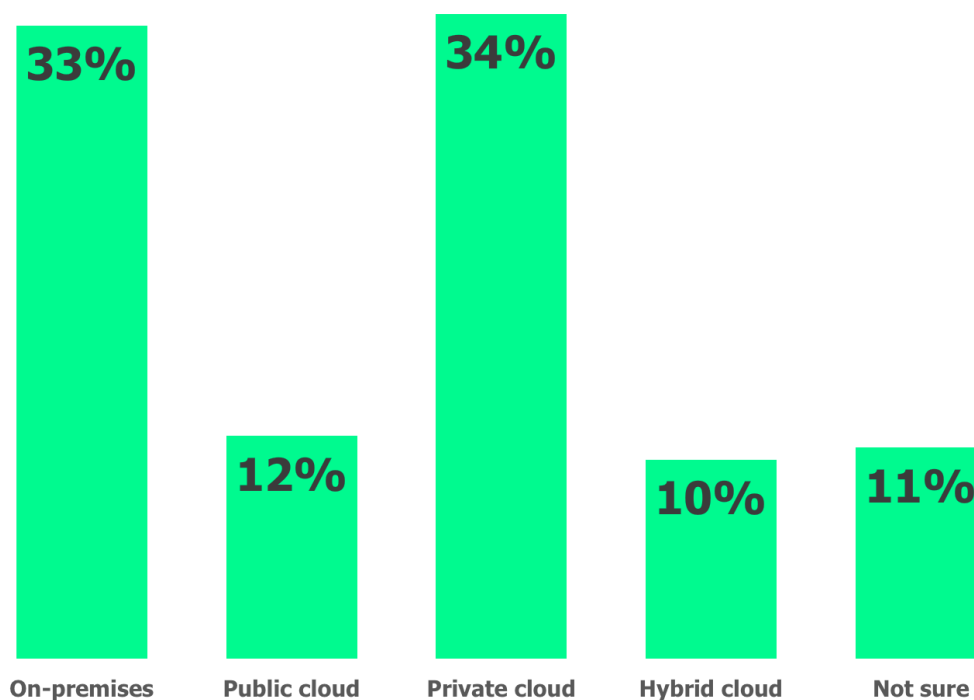

Source: Osterman Research, Inc.

Figure 8
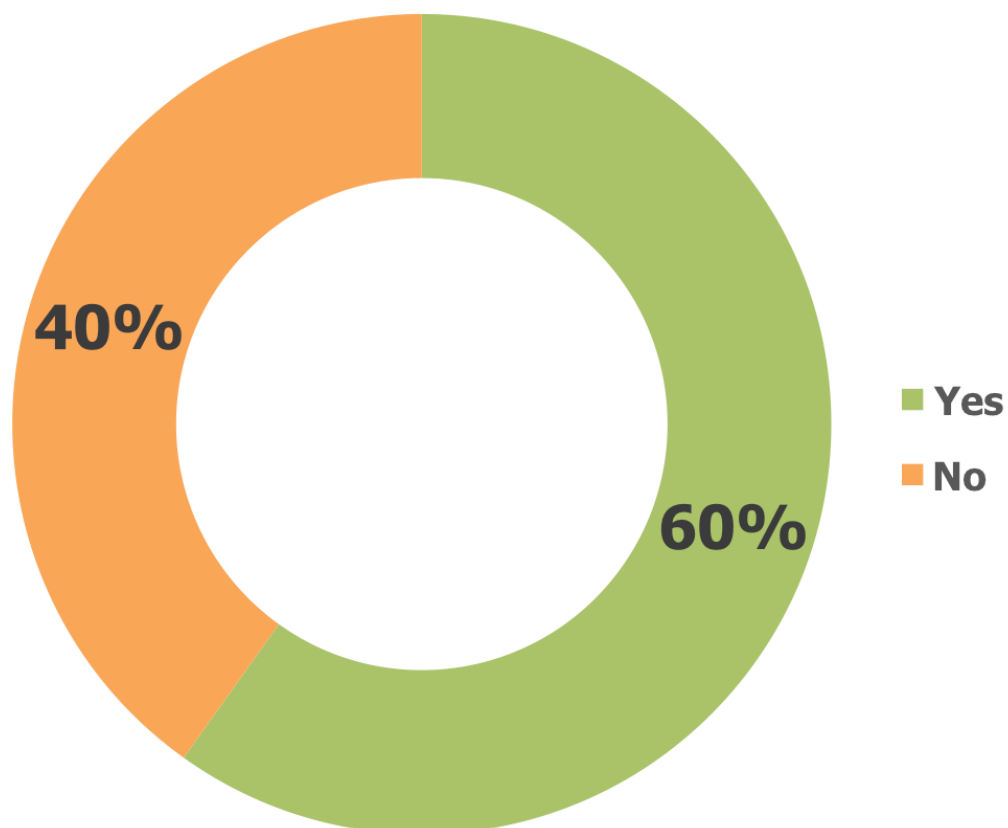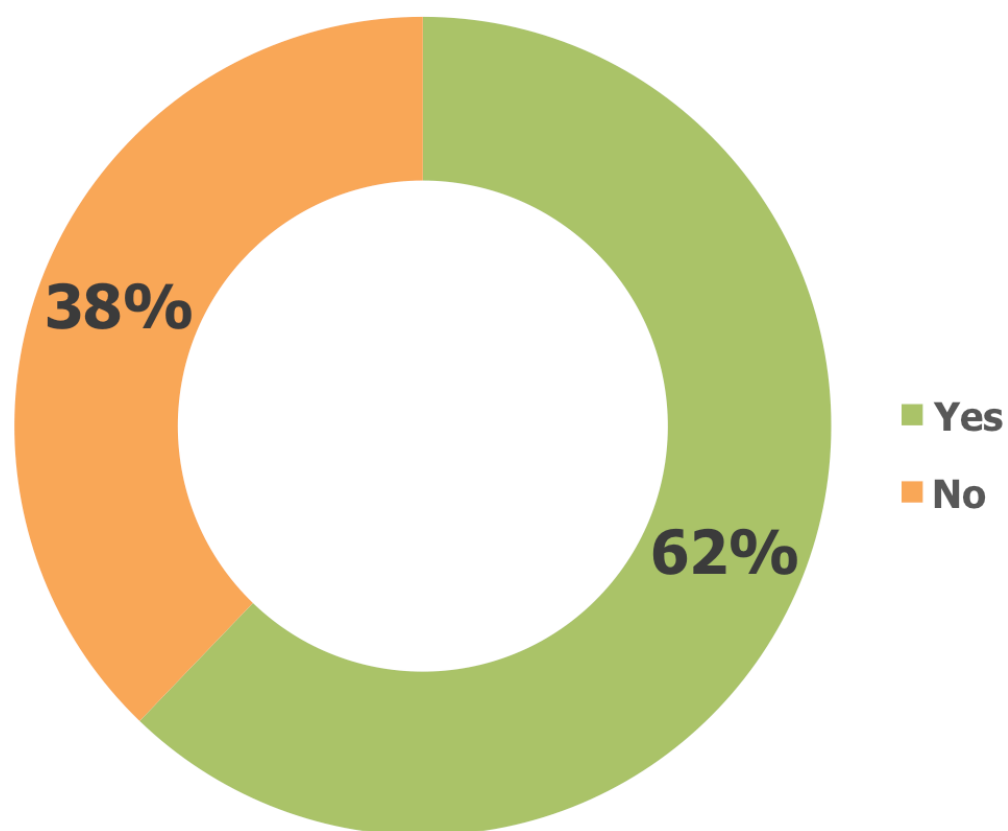**Methods That Would Be Used to Deploy a Critical, Internal-Facing Application Initially**

Source: Osterman Research, Inc.

Figure 9
Methods That Would Be Used to Deploy a Critical, Internal-Facing Application Once It Was Thoroughly Vetted and Fully Operational

Source: Osterman Research, Inc.

Figure 10
"Has your (or would your) use of hybrid cloud require a change in security solutions?"

Source: Osterman Research, Inc.

Figure 11
"Has your (or would your) use of hybrid cloud require a change in security policy?"

Source: Osterman Research, Inc.

Figure 12
"Would you say that your applications are more secure in the cloud compared to managing them on-premises?"
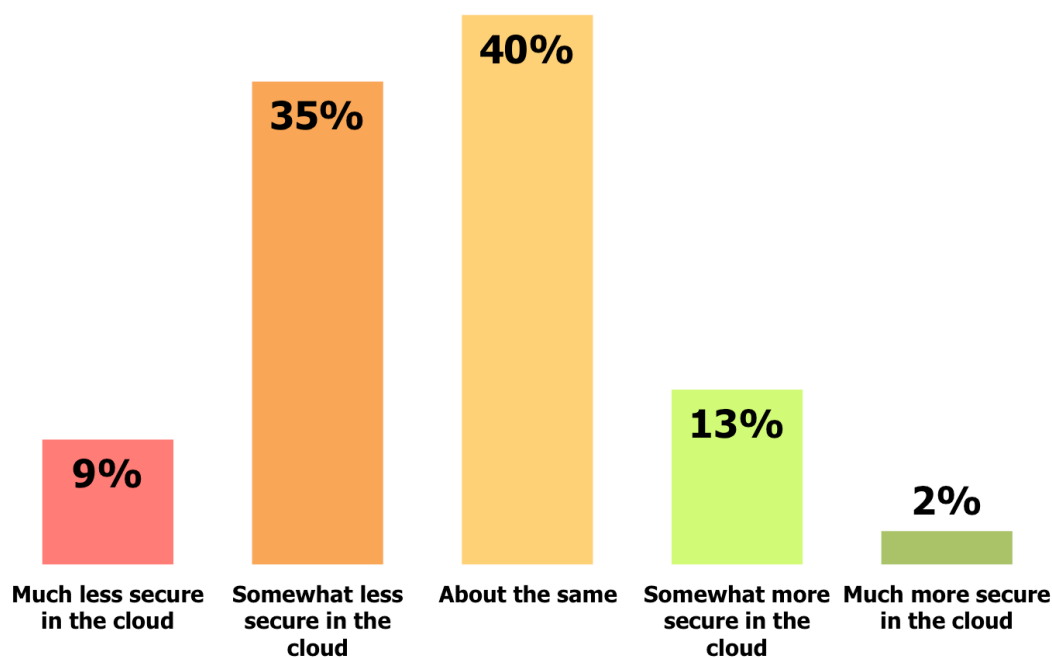
Source: Osterman Research, Inc.

Figure 13
Methods That Would Be Used to Deploy a System That Managed Public-Facing Information Initially and Once It Was Thoroughly Vetted and Fully Operational (Final Deployment)
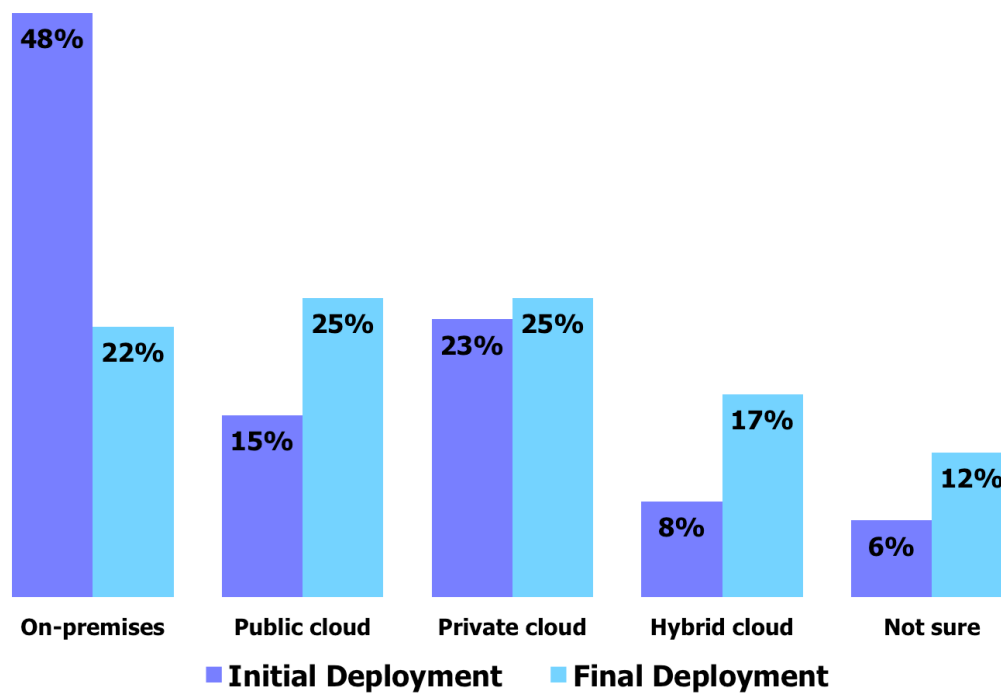
Source: Osterman Research, Inc.

Figure 14
Methods That Would Be Used to Deploy a System That Managed Highly Confidential Information or Corporate Intellectual Property Initially and Once It Was Thoroughly Vetted and Fully Operational (Final Deployment)

Source: Osterman Research, Inc.