Business User Survey, 2009

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SCOPE

This survey, designed and administered by The Radicati Group, Inc. in late-2009, examines business user attitudes and behavior with regards to messaging and collaboration. The survey was conducted with 110 business users on a worldwide basis.

The questionnaire used in the study aimed at identifying business user behavior and preferences in the following areas:

- Business Email Use
- Instant Messaging Use
- Business Social Networking Use
- Wireless Email Use
- Security & Email Hygiene

A section on consumer user behavior (i.e. outside of office hours) in all of the above areas is also included.

METHODOLOGY

The data and analysis contained in this study is based on primary research conducted in the form of data collected from a specifically designed questionnaire which was administered by email to survey respondents around the world in late 2009.

Experienced analysts from The Radicati Group, Inc. collected and analyzed the data. Survey respondents were business users in companies of all sizes, in various industries, all around the globe.

EXECUTIVE SUMMARY

- This study examines the attitudes and preferences of business users with regards to messaging and collaboration technologies. It also compares and contrasts their business use of messaging and collaboration with the use of the same technologies in their consumer lives. The survey was conducted among 110 business users across organizations of all sizes, in a broad set of industries distributed across many different geographical regions.

- Based on our survey, users spend an average of 19% of their work day (i.e. 1 hour and 17 minutes) sending and receiving email. In addition, they spend 8% of their work day (i.e. 38 minutes) on Business Social Networking sites, and 7% (i.e. 35 minutes) of their work day on Instant Messaging.

  o Survey respondents sent and received an average of 108 email messages per day in 2009, which is somewhat lower than the average of 140 email messages sent and received in 2008. This is the first year that we note a decline in the amount of email sent and received, which we believe it is directly attributable to the growing popularity of other forms of communication such as Instant Messaging, and Social Networking.

  o Survey respondents also carried on an average of 8 IM conversations per day, with approximately 6.6 different people.

  o They sent and received an average of 9.3 SMS text messages a day.

  o 78% of respondents indicated they use Business Social Networking sites at work for business purposes. Employee to employee communication was the most prevalent use of social networking sites in the workplace.

- Business users in our study reported that on average 18% of the emails they receive is spam, despite the use of anti-spam filters. While this is a slight increase over last year, when on average users reported that 16% of emails received were spam, it shows that current anti-spam filters are still keeping up fairly well with the continual growth in the amount of spam transmitted.

  o Users reported a considerably higher amount of spam in their consumer inboxes averaging 29% of emails received.

- The number of virus attacks reported was also slightly higher in 2009 with an average of 1.7 virus attacks per month, compared with only 1.3 virus attacks per month in 2008. However, the clean up time decreased from an average of 3 hours per incident to 2.2 hours per incident, showing again that anti-virus technology is improving and making it easier to recover quickly.

- The use of wireless "push" email has also seen strong growth in 2009, with 78% of users that receive email from their phones indicating they have email pushed to their Smartphones, as opposed to 22% of users who access email from a browser on their phone.

- In terms of consumer online behavior, email was the prevalent consumer online activity with users spending on average 32% of their online time on email. Online shopping came in second and represented approximately 22% of time spent online.

  o Consumers carried out an average of 3.6 IM conversations per day, and visited an average of 2.5 social networking sites per day in 2009.

- Table 1, summarizes the average number of business and consumer emails sent and received per user per day, as well as the percentage of spam received in the inbox.

Average Daily Email Traffic	Business	Consumer
Total Emails Sent/Received per User/Day	108	44
Emails Sent	34	7
Emails Received	74	37
% Spam Received	*18%*	*29%*

Table 1: Average Email Traffic per User/Day, 2009

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