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## ***Corporate IT Survey – Messaging and Collaboration, 2009-2010***

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### **SCOPE**

This survey, designed and administered by The Radicati Group, Inc. in mid-2009, examines the attitudes and procurement plans of corporate IT organizations with regards to messaging and collaboration. The survey was conducted across 92 business organizations of all sizes worldwide, representing a total of 293,400 email users.

The questionnaire used in the study aimed at identifying trends in the following areas:

- IT Budgets & Priorities
- On-premises vs. Hosted Email Preference
- On-premises Email Deployments
- Storage
- Hosted Email Deployment
- Security
- Email Archiving, eDiscovery, Data Loss Prevention
- Virtualization
- Instant Messaging
- Portals, Collaboration and Business Social Networks
- Wireless Email
- Unified Communications

All currency figures are expressed in \$USD.

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## METHODOLOGY

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

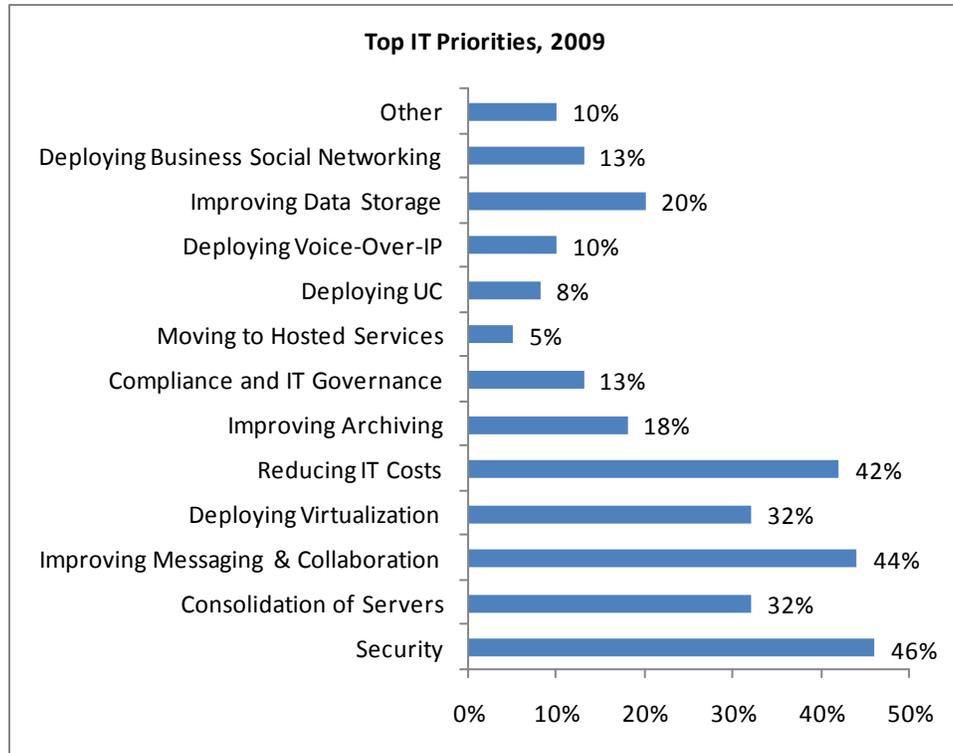
Experienced analysts from The Radicati Group, Inc. collected and analyzed the data. Respondents included many high level IT executives, vice presidents, directors, network administrators, messaging architects, systems managers, systems engineers, and other corporate decision makers. Survey responses were collected from companies of all sizes, in various industries, worldwide.

## EXECUTIVE SUMMARY

- This study looks at corporate IT deployment attitudes, usage, and procurement plans of 92 organizations worldwide. It includes organizations of all sizes from SMBs with less than 100 users to very large organizations with over 10,000 users. The main goal of the study was to understand budgets, current deployed solutions and future procurement plans.
- Despite the worldwide economic downturn most organizations (i.e. 43%) indicated that their IT budgets did not really change from 2008 to 2009. We believe this attributable to the fact that most budgets were already allocated in 2008, prior to organizations recognizing the economic downturn and were not subsequently revised downward.
  - However, 35% of organizations reported that their IT budget decreased by an average of 25%. This is very steep compared to the same survey conducted in 2008 when 18% of organizations reported a decrease, by an average of 16%.
  - Organizations also indicated that Increasing Efficiency was their primary strategic objective in 2009, followed by Increasing Employee Productivity. This points to a desire on the part of organizations to do more with smaller IT and employee staffs rather than cut back on technology investments.

- Not surprisingly, Security was still the top IT priority for most organizations in 2009. Spam, Viruses and other forms of malware continue to be a main concern to organizations of all sizes. 40% of organizations surveyed, reported an average increase of 25% in the amount of spam received by their networks. While a significant portion of this is caught by security solutions deployed, the constant onslaught of spam does cost organizations significantly in terms of lost user productivity and continuous management and procurement of up-to-date security products.
- Despite the growing emphasis by vendors and the media on the benefits of hosted solutions, the overwhelming majority of our survey respondents were deploying on-premises messaging solutions (89% of organizations), rather than Hosted Email solutions (11% of organizations).
- In addition, organizations with on-premises messaging solutions were adamant about not wanting to move to a hosted email solution. Reasons given for this ranged from a lack of belief in the cost savings offered by hosted solutions to a real concern for loss of control over their environment and data.
  - When asked to explain their reasons for not moving to a Hosted Email solution, the resounding answer from 70% of organizations was that it does not “fit with their company direction”.
  - Organizations surveyed indicated they would consider moving to a hosted email solution only if they believed it would reduce their costs by an average of 54%.
- We asked organizations about their email storage needs and future procurement plans, and found that the most prevalent type of storage deployed were Storage Attached Network (SAN) solutions.
  - 54% of organizations surveyed indicated that their users are fine the amount of storage allocated to them, however 38% of organizations reported that they are planning to increase their storage allocation by an average of 57% per server in the next 12 months.
- In terms of email archiving, 54% of survey respondents indicated they currently have an archiving system in place, while an astounding 46% indicated that their organization does not currently use an archiving system or relies exclusively on PST files.

- Email continues to be the most important type of information organizations are looking to archive, with 93% of respondents indicating that email is their main archiving priority.
- Storage was the main driver for organizations that have deployed an archiving solution with 56% of organizations listing it as their main motivation for archiving. “Internal Compliance and IT Governance” and “Regulatory Compliance” were distant choices with only 32% and 29% of responses respectively.
- While wireless email is becoming prevalent in most organizations today, 71% of the organizations we surveyed had a corporate solution in place, it is still being made available to only a relatively small portion of the user population in those companies. In our survey sample, only 26% of employees have the use of a wireless email device paid by the company, while 23% of the employee population is still purchasing their own wireless email solution (the remaining 51% of employees do not have a wireless email solution).
- We found increasing interest among survey respondents for Unified Communications (UC), 21% of respondent organizations indicated that they are currently deploying a UC solution, while 43% are considering deploying one in the near future.
  - Surprisingly, however, cost was listed as the most important criteria in selecting a UC solution over features and functionality. This confirms that cost has been a major barrier to the widespread adoption of UC and that the benefits which UC provides are still not considered “mission critical” by many organizations.
- Figure 1, below shows how organizations ranked their top three IT priorities in 2009.



**Figure 1: Top IT Priorities, 2009**

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