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A TECHNOLOGY MARKET RESEARCH FIRM

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Business User Survey, 2010

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SCOPE

This survey, designed and administered by The Radicati Group, Inc. in late-2010, examines business user attitudes and behavior with regards to email and collaboration technologies. The survey was conducted with 120 business users on a worldwide basis.

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

- Business Email Use
- Business Instant Messaging Use
- Business Social Networking Use
- Business Wireless Email Use
- Unified Communications
- Security & Data Protection
- Consumer Online Behavior

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 2010.

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, completed in late 2010, summarizes the attitudes and preferences of business users towards the use of different messaging and collaboration technologies. The study was conducted among 120 business users worldwide, across organizations of all sizes and a broad range of industries. In addition to asking about the use of messaging and collaboration technologies in their business lives, the study also asks respondents about their use of the same technologies for personal use, as a consumer, and compares and contrasts business and consumer attitudes.
- On average, survey respondents sent 33 business email messages per day, and received approximately 72 business email messages per day in 2010. Of the 72 daily emails received, an average of 14 emails per day included attachments.
 - The number of business emails sent and received per business day has pretty much leveled off from 2009 to 2010 (i.e. 34 business emails sent and 74 received in 2009). We believe that this is largely due to the growing popularity of other technologies for business communications such as IM, and Social Networking.
 - The number of emails containing attachments has also remained fairly steady with an average of 13 a day in 2009 and 14 a day in 2010. This is a result of better user education, as well as of the greater availability of Business Social Networking sites for “posting” information that may previously have been distributed as email attachments to large numbers of users.
- Spam continues to be a problem, and the percentage of spam received by business users grew from an average of 18% in 2009, to an average of 19% in 2010.
 - In addition, 20% of respondents indicated that they purchased something as a result of an unsolicited email. This is a fairly high response rate which helps to legitimize unsolicited email as a way to do marketing.
- Viruses are also a continuing concern with business and consumer users. Business users experienced an average of 2.1 virus attacks within the last 12 months, and it took these respondents an average of 2.8 hours to recover and clean up their system.

- Instant Messaging continues to grow in popularity with business users, with the vast majority, 74%, of survey respondents that use IM at work indicating that their company has a company-sanctioned IM solution for all employees to use.
 - 70% of respondents also said that they use IM more at work than at home which again shows how prevalent the use of IM has become for business purposes.
- We asked survey respondents if they access wireless email on their mobile phones. The majority of business respondents, 79%, use some form of wireless email on their mobile phone.
- Video conferencing is also becoming a very popular business communication tool with the majority of respondents, 67%, indicated that they use video calls for business-related communications. Most of this is for video calls with co-workers which helps cut down on travel costs and helps build teamwork among highly distributed work teams.
- Business Social Networks have found greater penetration with business users over the past year, with the broad majority of survey respondents indicating that they use Business Social Networks in the workplace.
 - However, only 20% of respondents felt that the use of Social Networking sites at work has reduced the amount of email they send and received.
 - A nearly equal number of respondents, 21%, felt they are actually getting more email due to the notifications generated by most Social Networking sites.
 - The majority of respondents, 59% felt they are getting about the same amount of email.
- This shows that despite the growing popularity of Social Networking as a communication tool it is not yet really chipping away at the amount of email sent and received.
- Table 1, below, 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 Email Traffic & Spam Penetration	Consumer	Business
Total Emails Sent/Received per User/Day	38	105
Emails Sent	6	33
Emails Received	32	72
<i>% Spam Received</i>	24%	19%

Table 1: Email Traffic and Spam – Consumer vs. Business, 2010

***To view the complete Table of Contents for this report,
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