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A TECHNOLOGY MARKET RESEARCH FIRM

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Survey: Corporate Email, 2011-2012

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SCOPE

This survey, designed and administered by The Radicati Group, Inc. in mid-2011, examines corporate and business user preferences, deployments, attitudes and behavior with regards to email. The survey was conducted with respondents from 100 business organizations of all sizes worldwide, representing a total of 228,068 email users.

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

- Corporate IT Budgets & Priorities
- Business Email Use
- Corporate Email Environment
- Storage
- Email Client Deployment
- Business Mobile Device Use

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

All currency figures are expressed in \$USD.

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Respondents were asked to answer on behalf of their organizations, as well as about their own personal use of technology.

Throughout this report we use the terms “business”, “organization” and “company” interchangeably. Government and Education are considered businesses for the purposes of this report.

METHODOLOGY

The data and analysis contained in this study is based on primary research in the form of data collected from a specifically designed online questionnaire which was administered by to survey respondents worldwide in mid-2011.

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 survey was used to understand corporate email deployment, user behavior, and future plans. The study was administered to 100 organizations worldwide ranging in size from SMBs to Large organizations with a total of 228,068 email users.
 - In addition to asking about the use of messaging 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.

- Surprisingly, 36% of respondents indicated that their IT budget increased from 2010 to 2011. This shows a healthy level of IT spending despite some lingering economic concerns. In part, we believe this is a reprise of IT investments that may have been put on hold or slowed down in previous years.
- We asked survey respondents what best describes their current email environment. Based on the total population of 228,068 email users, 52% of users were on a Microsoft Exchange Server messaging platform, while 15% of users were on IBM Lotus Notes/Domino. Despite the fact that there is strong interest in Hosted Business Email solutions, only 15% of the user population was on a Hosted Email solution. Also, only 6% of the email population was in organizations that deployed a Hybrid email environment.
- On average, survey respondents sent 41 email messages per day, and receive approximately 100 email messages per day. Of the 100 daily emails received, on average, 24 emails per day included an attachment.
 - The number of emails sent per day continues to increase, despite growing use of social networking and instant messaging. In 2010 users were receiving an average of 72 emails per day, and sending an average of 33 emails per day.
 - In addition, the average number of emails with attachments has increased from an average of 14 emails in 2010, to an average of 24 emails in 2011.
- Respondents indicated on average that about 16% of the email they receive is spam. This is only slightly lower than last year when respondents reported that 19% of email received was spam. This decrease is very positive, especially considering that overall Internet spam traffic continues to increase. It shows that for the most part email security solutions are making some headway in keeping under control the amount of spam that reaches end-users' inbox.
- Storage use continues to grow. Based on all responses the average storage per user was 18 GB. This was up considerably from the last year when the average storage per user was 10 GB.

- We asked survey respondents which email client their organizations' employees use to access email messages. Not surprisingly, Microsoft Outlook 2007 was still the predominant client in use, accounting for 31% of email clients deployed.
- Adoption of Apple iPhones and Android-based devices has increased rapidly with corporate users over the past year. The majority of business users, 85% of respondents, said they currently access email from their mobile phone for business.
- Figure 1, below shows the number of emails sent/received in 2011.

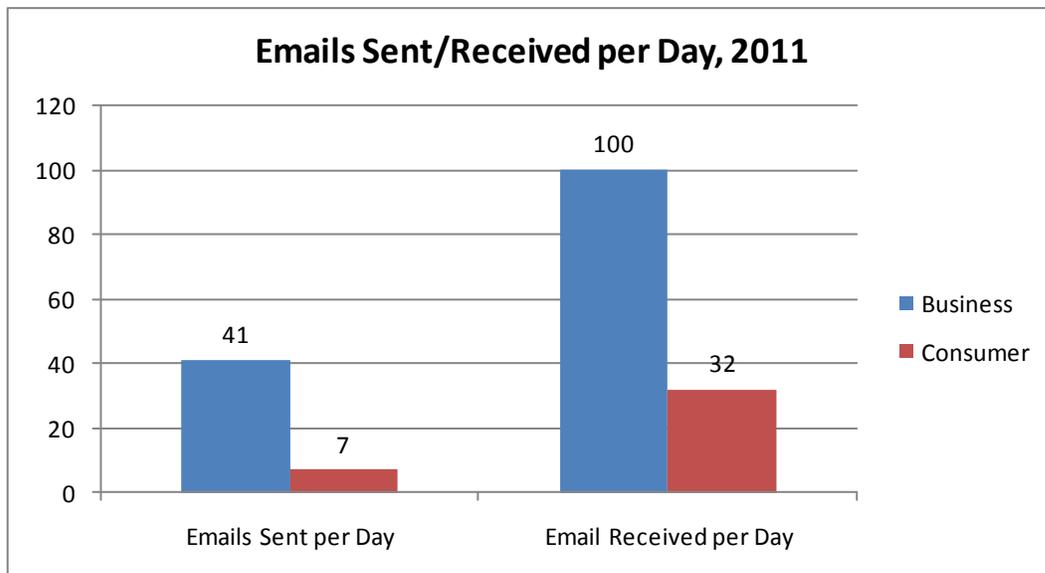


Figure 1: Email Sent/Received per Day, 2011

To view the complete Table of Contents for this report, visit our website at www.radicati.com.