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Survey: Instant Messaging, Social Networking, Unified Communications, 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 instant messaging, social networking, and unified communications (UC) solutions. 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 Instant Messaging Use
- Business Social Networking Use
- Business Unified Communications 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.

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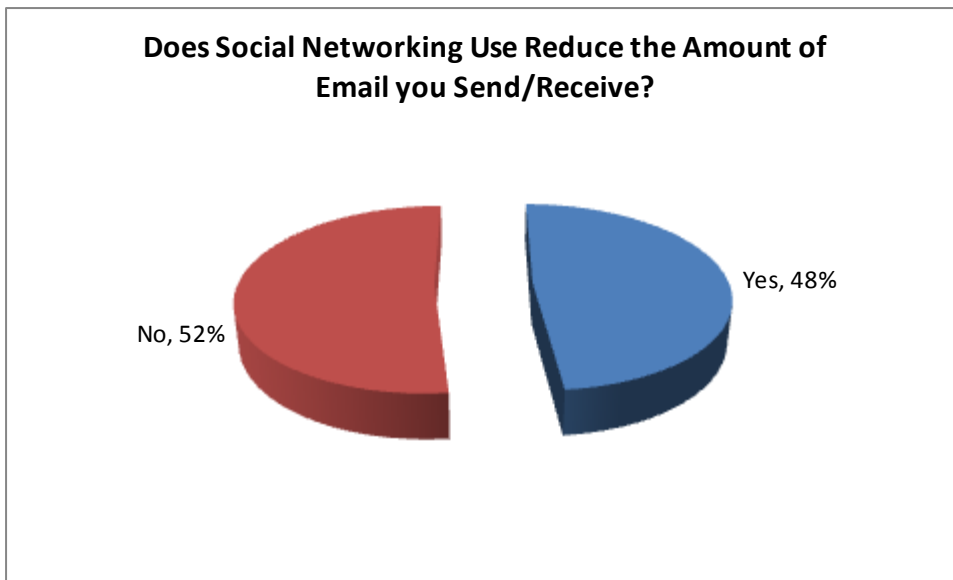
Experienced analysts from The Radicati Group, Inc. collected and analyzed the data. Respondents included many high level IT executives, vice presidents, directors, network administrators, messaging architects, systems managers, systems engineers, and other corporate decision makers. Survey responses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

EXECUTIVE SUMMARY

- This survey was used to understand corporate deployment, attitudes, and user behavior with regards to instant messaging (IM), social networking, and unified communications (UC). The survey 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 instant messaging (IM) and social networking 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.

- Instant messaging (IM) has been widely embraced by the business community. 84% of respondents said their organization mandates the use of a corporate-sanctioned IM solution. The fact that relatively so many organizations have a company-sanctioned IM solution points to the importance of IM in the workplace as well as the desire by organizations to have some control over IM use.

  o The survey found that the majority of respondents said they use IM primarily with co-workers, while a much smaller number of respondents said they use IM to chat with clients or customers.

- Business Social Networks have found greater acceptance with business users over the past year. 55% of respondents said that they use social networking for business purposes.

- Business Social Networks can be used either internally for internal employee communication, or externally with customers and partners. The majority, of responses indicated that their companies are using social networking primarily for external communications. 12% of respondents indicated that their companies have both internal and external facing social networking site.

  o We also asked respondents with an internal corporate social networking site if they find it useful. Responses to this question were fairly evenly spread out. The majority, 32%, said yes they find their internal company social networking site useful, while 28% said they were somewhat useful. 24% were not sure, while 16% indicated it was not useful at all.

  o The vast majority of respondents, whose organizations deploy an external social networking site, 61%, believed that their external company social networking site was useful for their customers.

- VoIP is increasingly gaining penetration in the business community. The majority of organizations surveyed currently use a VoIP solution as their main telephony system. Use of VoIP also showed strong growth from previous years.

- Although Unified Communications (UC) offers plenty of benefits, it has not yet gained much penetration among businesses. Only 25% of organizations surveyed indicated they are deploying a UC solution.

- We asked respondents whether they felt that the use of social networks has reduced the amount of business email they send and receive (Figure 1). Response to this was almost evenly split. 52% of respondents said that they see no change in terms of the amount of email sent and received, while 48% felt that it is helping to reduce the amount of email.

Does Social Networking Use Reduce the Amount of Email you Send/Receive?

No, 52%
Yes, 48%

Figure 1: Has the Use of Social Networks Reduced the Amount of Email?, 2011

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