Corporate IT and Business User Survey, 2012-2013

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SCOPE

This survey, designed and administered by The Radicati Group, Inc. in mid-2012, examines corporate and business user preferences, deployments, attitudes and behavior with regards to key collaboration technologies such as email, instant messaging, social media, mobility, security, information archiving and others. The survey was conducted with respondents from 67 business organizations of all sizes worldwide, representing a total of 957,786 business users.

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

- Business Email Use
- Business Instant Messaging Use
- Business Social Networking Use
- Business Mobile Device Use
- Corporate IT Budgets & Priorities
- Corporate Email Environment
- User Storage Allocation
- Email Client Deployment
- Microsoft SharePoint Deployment
- Security

- Archiving and Compliance
- Unified Communications

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 to survey respondents worldwide in mid-2012.
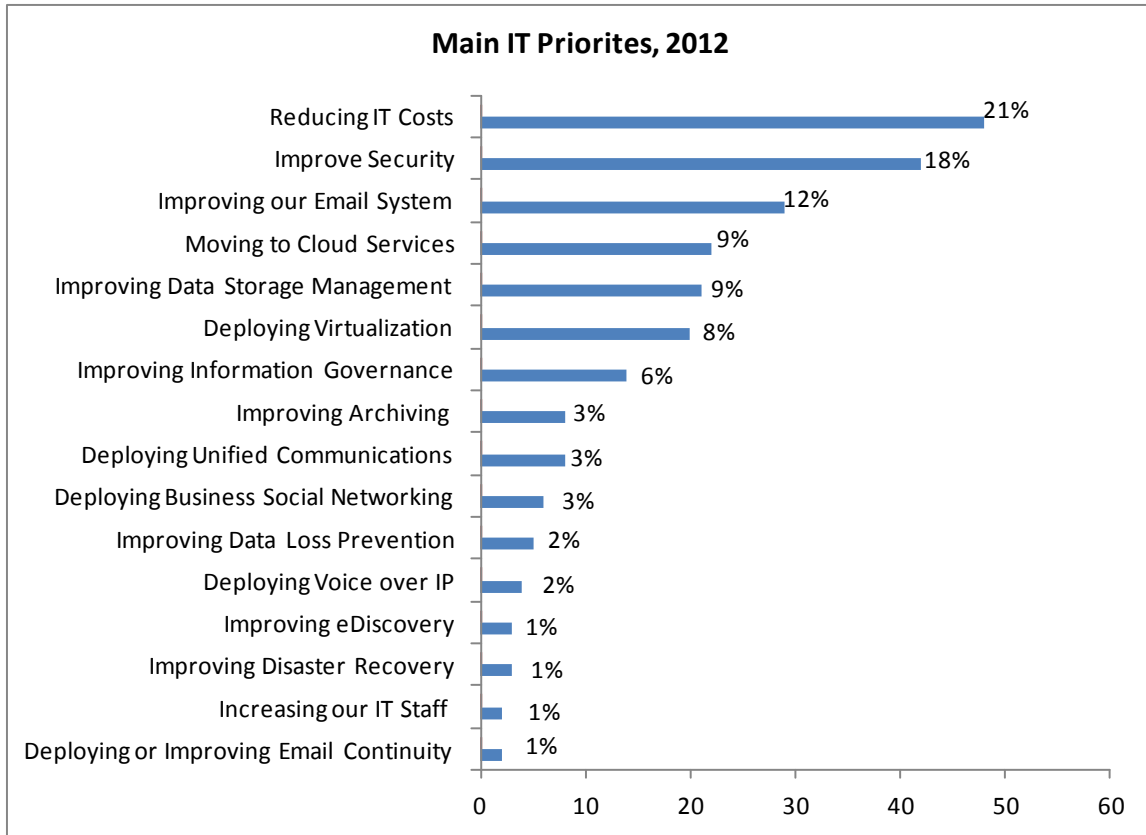
Experienced analysts from The Radicati Group, Inc. collected and analyzed the data. Respondents included CxOs, Line of Business Managers, IT Managers and other corporate decision makers or influencers. Survey responses were collected from companies of all sizes, in various industries, worldwide.

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EXECUTIVE SUMMARY

- This survey was used to understand corporate deployment choices and user behavior in the following areas: Business Email use, Instant Messaging use, Social Media use, Tablet and Mobile Device use, Corporate IT budgets & priorities, Corporate Email Environments, User Storage allocation, Email Client deployment, Microsoft SharePoint deployment, Security, Archiving and Compliance, and Unified Communications. This study was administered to 67 organizations worldwide ranging in size from SMBs to Large organizations with a total of 957,786 business users.

    o In addition to asking about the use of information sharing 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 36 email messages per day, and receive approximately 78 email messages per day. Of the 78 daily emails received, on average, 19% of emails received are considered spam by the recipient and 24% of emails received include an attachment. The size of attachments varies greatly but currently averages around 560KB.

- Business users on average spend over 2:30 hours of their business day online. An average of 1:05 hours per day is spent on internal company websites, while an average of 1:36 hours per day is spent on external (i.e. non company) websites.

- In terms of email systems deployed, the majority of organizations, 71% were still deploying an on-premises email solution, 19% of organizations were deploying a hosted (i.e. cloud) email solution and 10% were deploying a hybrid email solution (i.e. combination of on-premises and hosted). This shows that despite the well publicized advantages of cloud-based solutions, organizations are still slow to move to the cloud and disassemble their existing investments in on-premise solutions.

- Viruses and other malware are a continuing concern with both business and consumer users. Business users averaged 5.5 malware incidents per month, which required an average clean-up time per incident of 3.0 hours, while consumer users averaged 2.1 malware attacks per month with an average 3.8 hour clean up time. In both cases, while the number of incidents was somewhat higher than in previous years, the average time to recover was somewhat lower, indicating that virus detection and correction technology is improving.

- A growing number of organizations are deploying an email archiving solution (70% of respondents) driven mainly by storage concerns. eDiscovery and Data Loss Prevention (DLP) are also seeing strong uptake across all verticals.

- Instant Messaging (IM) is widely used for business communications, with 73% of our survey respondents indicating they use it on a daily basis with co-workers and clients or external partners and suppliers. On average business users have 8 IM conversations per day with an average of 5 different contacts, and spend about 41 minutes per day on IM.

- Despite the popularity of social media in the corporate world as a business tool, when asked if the use of social media is helping to reduce the amount of email they send and receive most business users (60%) said they did not see a change in the amount of email sent and received.

- "Reducing IT Costs" was the top IT priority with survey respondents in 2012. Followed by "Improving Security" in second place and "Improving our Email System" in third place. While it is not surprising that Reducing IT Costs and Improving Security made the top of the list, it is surprising that Improving Our Email System was in third place. We believe this is a reflection of vendor release cycles and a general perception on the part of organizations that we are the end of a 3-4 year cycle which requires a review of their basic email strategy. Figure 1, below shows how organizations characterized their main IT priorities in 2012.

Main IT Priorites, 2012

Priority	Percentage
Reducing IT Costs	21%
Improve Security	18%
Improving our Email System	12%
Moving to Cloud Services	9%
Improving Data Storage Management	9%
Deploying Virtualization	8%
Improving Information Governance	6%
Improving Archiving	3%
Deploying Unified Communications	3%
Deploying Business Social Networking	3%
Improving Data Loss Prevention	2%
Deploying Voice over IP	2%
Improving eDiscovery	1%
Improving Disaster Recovery	1%
Increasing our IT Staff	1%
Deploying or Improving Email Continuity	1%

Figure 1: Main IT Priorities, 2012

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