

Trends in Messaging

Michael D. Osterman

Osterman Research, Inc.

Puget Sound Network Users Group

August 29, 2007



OSTERMANRESEARCH

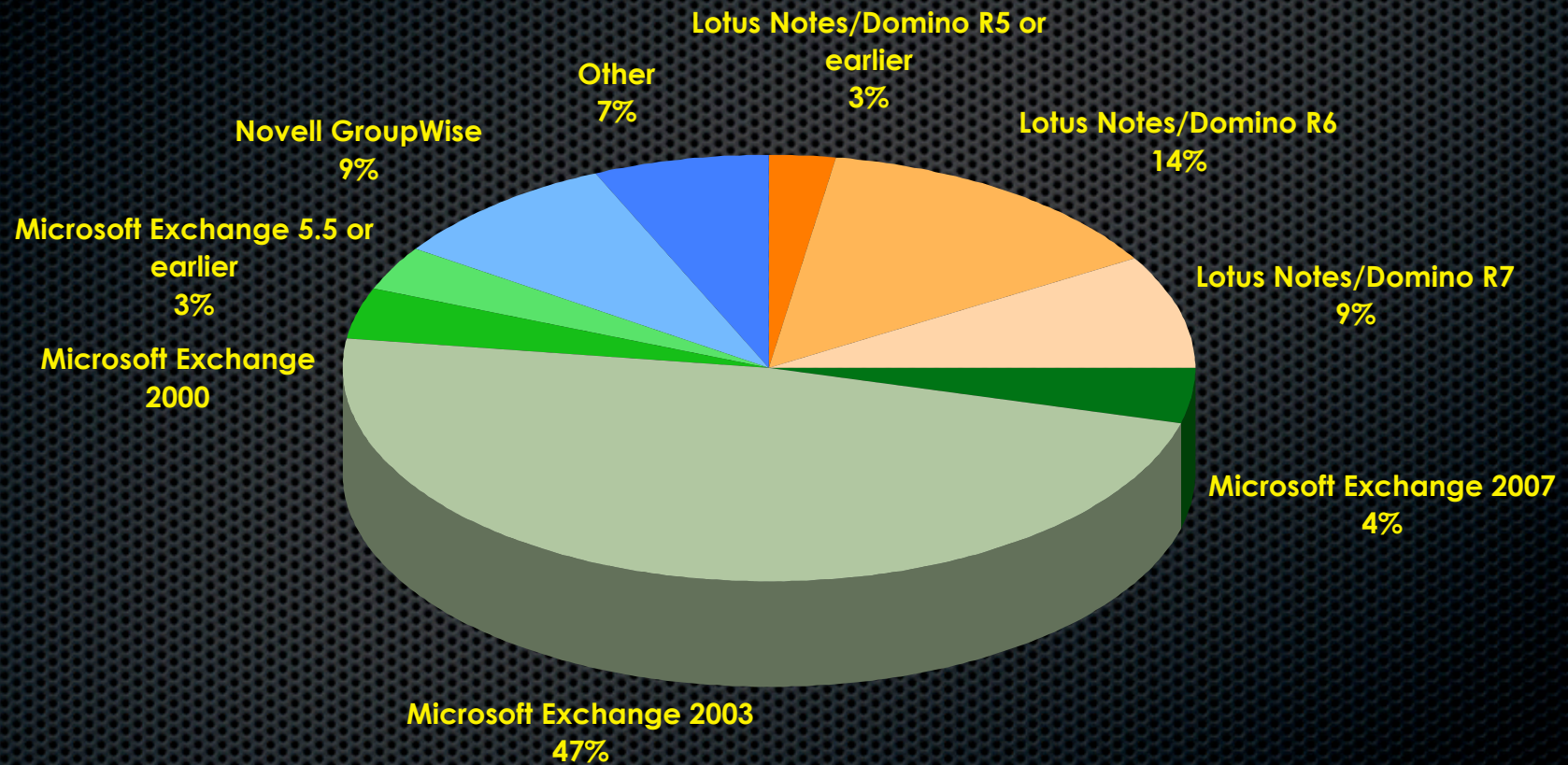
About Osterman Research, Inc.

- ✦ A Seattle-area market research firm focused on messaging and collaboration
- ✦ Focus areas include archiving, security, mobile messaging, collaboration, etc.
- ✦ Heavy emphasis on primary research using a panel of IT professionals and end users

Key Trends

- ✦ Archiving
- ✦ Mobility
- ✦ Hybrid security
- ✦ Hosting/managed services
- ✦ Continuity
- ✦ Other trends

Messaging Systems in Use



User Behavior

- ✦ Users spend a median of 60 minutes per week managing their mailbox
- ✦ User send a mean of 39 emails each day and receive a mean of 101 emails
- ✦ 72% of users check work-related email from on their own computer

User Behavior (cont'd.)

- 78% of email users save personal copies of some or all email to 'protect themselves'
- 88% of email users do so for knowledge management purposes
- A mean of 8.9% of email sent from work accounts is personal and not work-related
- 18% of email users suffer from email overload most or all of the time

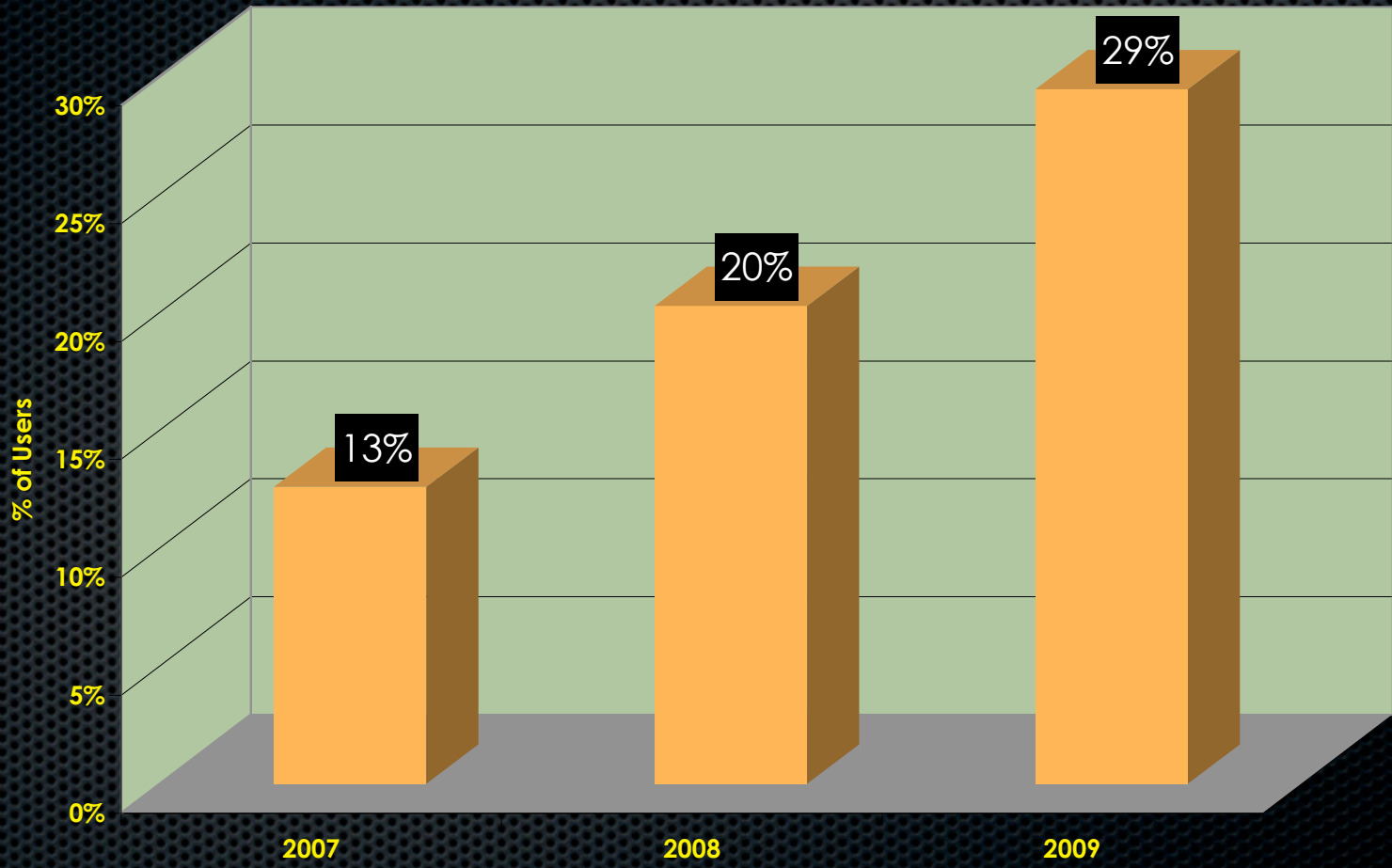
Archiving

- ✦ What is 'archiving'?
- ✦ Today, 21% of organizations archive email
- ✦ We anticipate that two-thirds of organizations will archive email by 2010

Drivers for Archiving

- Phase 1: Regulatory compliance
- Phase 2: Legal discovery and litigation support
- Phase 3: Storage management
- Phase 4: Knowledge management

Mobility



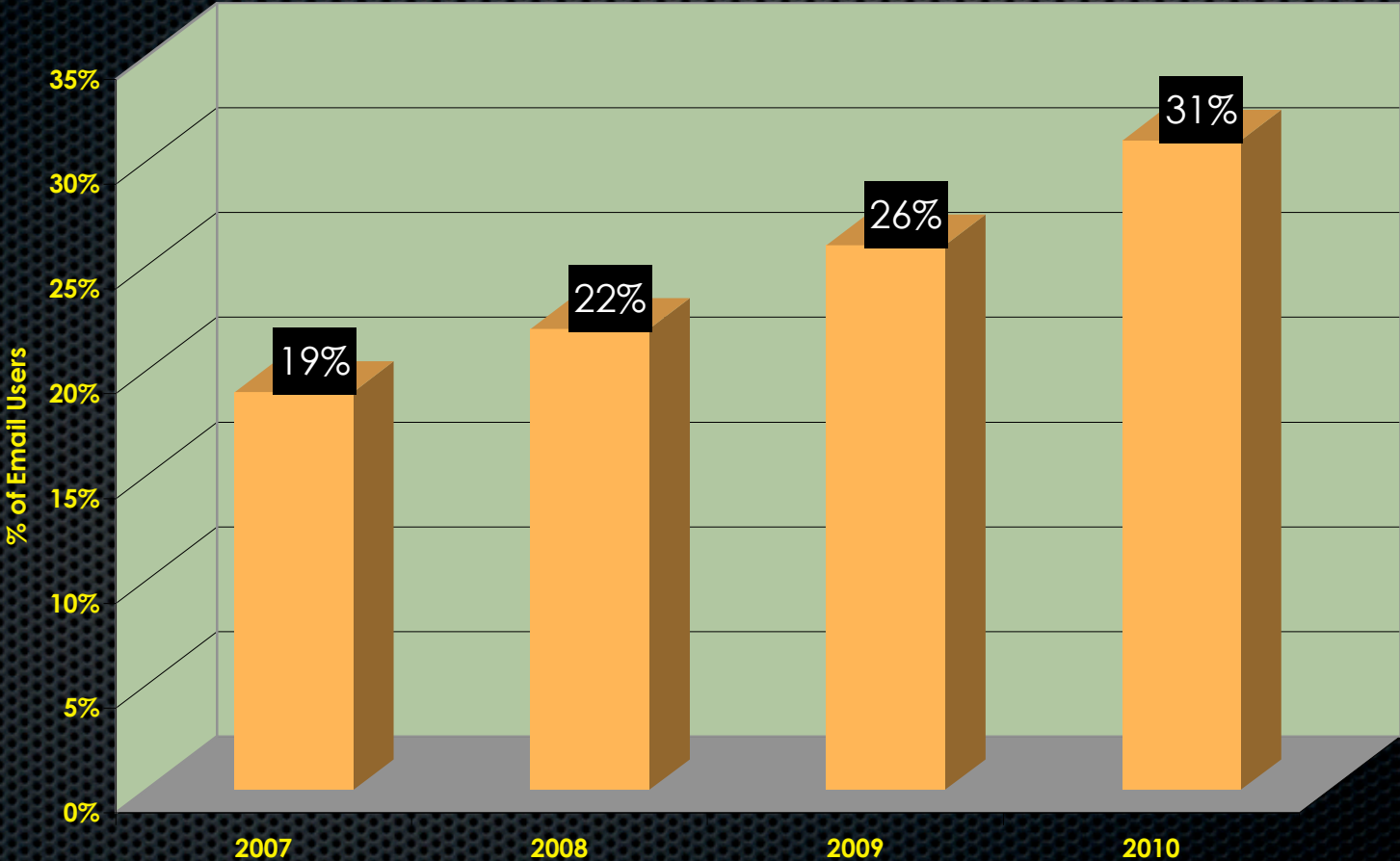
Mobility Drivers

- Small picture: people are more dependent upon email and need access to it, hence, the growing number of mobile email devices
- Big picture: business wants to save on real estate and move toward a 'hoteling' model
- Key trends will focus on SaaS for email, collaboration, applications

Hybrid Security

- Have we reached the end of content filtering?
- Traffic shaping and connection management are becoming more important
- The result will be a hybrid security model of on-premise and hosted solutions

Hosted/Managed Services



Key Concerns

- Cost
- Control
- Security

Trends in Hosted/Managed Messaging

- ✦ Greater acceptance of the hosted/managed model
- ✦ Used to be just for small businesses
- ✦ Large organizations are now considering hosted and managed services
- ✦ Hybrid model: Azaleos, Fortiva

Key Issues for Vendors

- Most organizations don't what it costs them to provide messaging capabilities
- Many decision makers underestimate the cost of providing messaging
- Overcome 'prejudices' against the hosted model

Continuity

- Business continuity and disaster recovery are becoming more important
- The average email system is up 99.84% of the time, or down about 70 minutes per month
- A hosted messaging service with 99.9% uptime would be seriously considered or deployed by only 37% of decision makers; 99.9% would be considered by 62%

Etc.

- ✦ IM use is increasing, but 'killer' applications are lacking
- ✦ Google's next move
- ✦ Linux vs. Windows
- ✦ What is the future of GroupWise?
 - ✦ What role will Novell's, GroupWise users' attitudes play in the future success of GroupWise?

For more information

Osterman Research, Inc.

+1 253 630 5839

info@ostermanresearch.com

www.ostermanresearch.com