



Messaging Archiving and Document Management Market Trends, 2008-2011

Report Focus

This report focuses on demand drivers for messaging archiving and related technologies in the North American market. The research conducted for this report, as well as the report itself, are focused on the needs of vendors, investors and others who are interested in participating in the messaging archiving market in some way, whether as providers of the archiving systems, forensics services or other offerings. The information presented is designed to help these vendors and interested parties make informed decisions about the future opportunities available in this market.

Key Findings and Trends Discussed in this Report

- **Growth in message-related storage is increasing rapidly**
Messaging storage has grown by nearly 30% during the period Winter 2007 to Winter 2008. Storage growth for email is actually growing faster than email use itself, primarily because there is greater use of attachments in email, larger attachments, more use of multimedia, and so forth. Our research found that storage growth is growing slightly faster for smaller organizations (up to 2,500 email users) than for larger ones – 31% during the past year versus 26%.
- **Most organizations have established an email retention policy**
Nearly three out of four organizations currently have an email retention policy in place. However, only about two-thirds of employees in organizations that have an email retention policy are fully aware of it, while the remaining one-third are not fully aware of the policy.
- **One in ten organizations believes that deleting all content is the least risky approach**
While 32% of organizations believe that preserving all email content for long periods is the least risky option, 10% believe that deleting all content poses the least risk. However, 28% believe that using an archiving solution poses the least risk, but nearly one-third of organizations are still not sure about the least risky approach.
- **The typical organization has had to conduct a search every 73 days this past year**
During the 12 months preceding the survey conducted for this report, IT departments in the organizations surveyed had to conduct a median of five searches through backup tapes, local message stores, etc. to find email in response to a discovery order, a request from a regulatory agency or for some other reason. However, some organizations have had to conduct far more searches, and larger organizations have been more likely to conduct them.



- **Two in three organizations have had to produce employee email or instant messages**
Nearly two-thirds of organizations have been ordered by a court or regulatory body to produce employee email or instant messages, while a slightly higher percentage have referred back to their email or instant message archive or backup tapes to support their innocence in a legal case.

- **Most are not very confident of managing data well**
Only 51% of organizational decision makers are confident or extremely confident in their ability to retrieve all information that is requested for e-discovery or other obligations. Only 48% are this confident that relevant messages are not destroyed after the organization receives a legal hold or discovery order, while confidence drops to 32% when asked if all data is actually destroyed after it no longer needs to be retained.

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About Osterman Research, Inc.

Osterman Research, Inc. provides market research, cost modeling, benchmarking and related services to vendors of messaging and collaboration products and services.

We help vendors, IT departments and other organizations make better decisions through the acquisition and application of relevant, accurate and timely data on markets, market trends, products and technologies. We also help vendors of technology-oriented products and services to understand the needs of their current and prospective customers.

Part of what makes us unique is our market research panel: a large and growing group of IT professionals and end-users around the world with whom we conduct our research surveys. This allows us to conduct surveys quickly and accurately.

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