



Presence, IM and Real-Time Communication Trends, 2008-2011

Report Focus

This report focuses on demand drivers for instant messaging, presence and real-time communication capabilities. 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 this space. The information presented is designed to help vendors and other interested parties make informed decisions about the future opportunities available in this market.

The research was conducted, and this report was written, from an objective viewpoint, not with any predisposition for or against a particular point of view. Because multiple vendors were involved in funding this report, no particular vendor's viewpoint had an influence on shaping the research focus, although early subscribers to the report were given the opportunity to provide input to the research program conducted specifically for this report.

Key Findings and Trends Discussed in this Report

➤ **Instant Messaging Grows Up**

There are numerous indicators pointing to instant messaging's maturation within the enterprise. The proportion of respondents indicating that there was a business case for enterprise instant messaging increased since last year. The people deciding on the purchase of enterprise instant messaging are now increasingly IT management, suggesting that enterprise instant messaging systems may be gaining greater acceptance within business and no longer require the sort of executive or line of business sponsorship needed for new applications.

➤ **Not Just Instant Messaging**

Having said that, the story isn't about just instant messaging; it's about the entire unified communications package. Desktop videoconferencing showed the highest growth rate, increasing by 145% since last year and Web conferencing tool growth of 87% exceeded last year's projected 37% growth, as noted above. Adding video and voice to instant messaging is now more popular than it was last year. The most desired voice features are incoming call alerts and calling rules.

➤ **Going Mobile**

Mobile instant messaging remains the fastest growing segment of the instant messaging market. The spread of smartphones and unlimited data plans will help organizations project communications costs and only encourage the spread of mobile instant messaging. The biggest users for mobile instant messaging continues to be travelling employees and senior technical managers.



- **Why Enterprise Instant Messaging?**
The drivers for enterprise instant messaging remain consistent with last year’s research with the exception that there is greater emphasis on increasing infoworker productivity in the event of an email outage. More than one-half of respondents indicated that it was common or very common for them to use instant messaging to support communications and collaboration.

- **Consumer Connections Remain Critical**
Organizations are more receptive than last year to keeping some form of consumer instant messaging service in use within their organizations. Far more respondents this year indicated that they were willing to compromise on security for consumer client connectivity. Furthermore, more respondents indicated that they will not swap out their employees’ consumer-grade instant messaging clients in favor of enterprise-grade clients.

Table of Contents

Chapter 1	
Executive Summary	1
Chapter 2	
Background and Methodology	7
Chapter 3	
The Current State of Real-Time Communications	9
Chapter 4	
Drivers for Presence and Real-Time Communications	17
Chapter 5	
Adoption of Enterprise Instant Messaging	23
Chapter 6	
Desired Features and Functions	27
Chapter 7	
The Role of Presence	39
Chapter 8	
Inhibitors to Real-Time Communications	43
Chapter 9	
The Future of Real-Time Communications	49



List of Figures

North American Instant Messaging Penetration, 2008-2011	5
Email Users Equipped With Various Other Communication Technologies	9
Enterprise Instant Messaging Systems That Have Been Deployed	13
Length of Time That Employee- and IT-Deployed Instant Messaging Has Been in Use	14
“Have any of your employees ever been fired for looking at other employees’ email or instant messaging conversations without having permission to do so?”	15
Key Drivers for Instant Messaging Use	17
“Does your organization develop and/or deploy any applications on top of your instant messaging/presence infrastructure, such as allowing access to a CRM system or enterprise directory through an instant messaging interface?”	18
Effectiveness of Instant Messaging as a Means of Reducing Telephone and Fax Costs	20
Key Decision Makers for Deployment of Enterprise Instant Messaging Solutions	21
Current Status of Adoption for Enterprise Instant Messaging	23
Importance of Reasons for Rolling Out Enterprise Instant Messaging	24
“If you have deployed (or would deploy) enterprise instant messaging, what are (or would) your plans for consumer instant messaging?”	25
“Does your organization have a formal policy related to instant messaging use?”	29
Elements Included in Instant Messaging Policies	30
Preference for Protecting Consumer Instant Messaging vs. Deploying Enterprise Instant Messaging Based on Cost.....	31
Plans for Deploying a System to Archive Instant Messages	32
Importance of Various Functions in Integrating Instant Messaging and Telephony.....	33
Importance of Various Capabilities for Instant Messaging Security	34
Importance That The Instant Messaging / Real-Time Communications System Come From the Same Vendor as the Corporate Email System.....	35
“Is your organization willing to accept some reduction in the security of your internal messaging systems in order to allow your users to communicate via public instant messaging networks?”	36
Key Job Functions That Use / Would Use Wireless Instant Messaging	37
“How common is it for instant messaging presence to be used to facilitate communications and collaboration in your organization?”	39
Knowledge of How to Use Presence Outside the Context of Instant Messaging.....	40
Factors That Are Holding Back Greater Use of Presence	41



List of Figures (concluded)

Reasons for Not Deploying Enterprise Instant Messaging as a Pilot or in Production	43
Concerns About Enterprise Instant Messaging	44
Reasons for Being Unlikely to Replace Consumer-Grade Instant Messaging Clients	46
Barriers to Integrating Instant Messaging / Real-Time Communications With Telephony ..	47
Views on the Impact of Instant Messaging on Email Traffic	49
Importance of Extending Presence, Instant Messaging and Real-Time Communications Into Various Applications	50
Likelihood of Swapping Out Consumer-Grade Instant Messaging Clients in Favor of Enterprise-Grade Clients During the Next 12 to 24 Months	51
Importance of Using Instant Messaging for B2B and B2C Communications, 2008 and 2009	53
Email Users That Use or Will Use Telephone Integration, Such as the Use of a Soft Phone in Their Instant Messaging Client, 2008 through 2011	54
Importance of the Concept of Presence, 2008 and 2009	55
Priority of Integrating Presence Into Other Applications, 2008 and 2009	55
Interest in the Use of Wireless / Mobile Instant Messaging, 2008 and 2009.....	56
Median Budget per Email User for Instant Messaging and Presence, 2007 through 2009 .	57
Delivery Models Used for Instant Messaging and Real-Time Communications Capabilities, 2008 and 2009	58
Desirability of Various Delivery Models for Enterprise Instant Messaging and Real-Time Communications Capabilities.....	59
Desirability of Various Delivery Models for Enterprise Instant Messaging and Real-Time Communications Capabilities If Options 3 and 4 Were Priced >50% Lower Than Options 1 and 2	60

List of Tables

Instant Messaging Systems in Use, Being Considered and Not Being Considered	11
Importance of Various Communication and Collaboration Capabilities	27
“If you were going to roll out instant messaging to each of the following groups, which would you prefer for each group?”	52



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.

**Presence, IM and Real-Time Communication Market Trends, 2008-2011
was published in September 2008 and is available for \$2,495**

For more information on Osterman Research,
or if you have any questions about this
report, please contact us at:

Osterman Research, Inc.

P.O. Box 1058

Black Diamond, WA 98010-1058

Tel: +1 253 630 5839

Fax: +1 866 842 3274

Email: info@ostermanresearch.com

<http://www.ostermanresearch.com>





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