



## Enterprise Instant Messaging and Presence Trends, 2006-2009

### Report Focus

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This report is focused on the North American market for instant messaging (IM) and presence in the workplace. The report offers a detailed analysis of how and why IM is used in the enterprise, the factors that are driving adoption of enterprise IM and the applications for which presence will be used during the next few years. The study discusses and analyzes the results of two Osterman Research surveys conducted for this report. The report provides a complete analysis of the North American market for IM and presence, including a three-year forecast of IM penetration into organizations and demand among users.

### Key Findings and Trends Discussed in this Report

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- Osterman Research found in its semi-annual IM tracking survey that IM is currently used by a mean of 35% of email users in the workplace today, but that this figure is expected to increase to 47% by the first quarter of 2007 and to 72% by year-end 2007.
- AOL Instant Messenger and MSN Messenger are the primary IM clients in use by organizations, as measured by the number of organizations in which these clients are used. Yahoo! Messenger is also widely used, followed by Microsoft Windows Messenger and Lotus Sametime, the leading enterprise-grade IM system used in the workplace.
- Twenty-five percent of organizations have settled on one or more IM systems as their corporate standard.
- Until recently, it was common for IM deployments to be initiated by employees – a typical ‘deployment’ consisted of employees downloading a copy of a popular IM client and using it for personal communications. During the last 12 months, however, there has been a substantial increase in IT-initiated deployments of IM.
- Among organizations that use IM, the vast majority used consumer IM in 2002 and continue to do so today. During the 2002-2006 timeframe, however, the penetration of enterprise IM has continued to increase.
- IM and Web conferencing will be the key technologies, in addition to email, that will form the backbone of workplace communications capabilities moving forward. This implies that presence will be a key driver for corporate communications during the next few years, and that presence integration into existing communications channels and applications will become significantly more important than it is at present.



- In 2006, a significantly greater percentage of organizations believe that IM could likely or definitely help them in providing support to customers, communicating with remote employees, reducing telephone expenses and improving overall communications than has been the case in past Osterman Research surveys.
- Preferences for traditional IM clients versus the zero-footprint client model vary widely depending on the audience for which the IM is intended.
- Two-thirds of organizations consider the potential for worms and related threats to enter through their IM infrastructure as a concern or major concern.
- Organizations have a long list of desired IM management attributes that are considered to be important or extremely important. The top five attributes focused on security, such as authentication, blocking unwanted traffic and encryption, as well as control attributes that include infrastructure control and the ability to enable or disable IM features.
- Many organizations are just beginning to grasp the need to develop IM guidelines and policies for appropriate use of the technology. More than one-half of the organizations surveyed for this report indicated that their organization has no formal policy with regard to IM.
- There is a desire by almost two-thirds of organizations to deploy an enterprise-grade solution provided that cost is not a significant factor in the decision process. However, the number of organizations that prefer an enterprise-grade IM capability drops from 65% to 43% percent when cost is taken into consideration.
- Organizations place a high value on open standards when it comes to IM technology.
- About one-half of organizations would prefer interoperability between IM systems that is based on standards, but they are willing to accept federation between IM networks as a substitute for standards-based interoperability as an interim step.
- A majority of organizations admit not having a significant level of knowledge about how to apply presence beyond IM applications. However, the level of importance attributed to integrating presence into other applications is gaining momentum as organizations look to the future.
- Wireless IM is of significant interest to a majority of organizations. The interest level is growing from year to year with organizations expressing increasing levels of interest in the use of wireless IM.



## Table of Contents

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|  |    |
|--|----|
| 1. Executive Summary .....                                     | 1  |
| 2. Methodology and Overview .....                              | 9  |
| 3. Current and Planned Use of Communication Technologies ..... | 11 |
| 4. Factors Driving Instant Messaging Use .....                 | 23 |
| 5. Consumer-Grade Instant Messaging Deployments .....          | 27 |
| 6. Instant Messaging Management Practices .....                | 33 |
| 7. Instant Messaging Feature and Capability Requirements ..... | 41 |
| 8. The Role of Presence .....                                  | 53 |
| 9. Future Instant Messaging Deployment Plans .....             | 65 |
| 10. Vendors of Instant Messaging Solutions .....               | 75 |

## List of Figures

---

|  |    |
|--|----|
| Historical and Forecast Penetration of IM in the Workplace .....   | 1  |
| Current or Planned Use of Instant Messaging for Business Applications .....  | 11 |
| Current or Planned Use of Instant Messaging for Business Applications, 2002-2006 .....   | 12 |
| Current Status of Instant Messaging Deployments .....  | 13 |
| Penetration of Various Communication Technologies .....  | 14 |
| Instant Messaging's Effectiveness in Reducing Telephone and Fax Costs .....  | 15 |
| Applications for Which Instant Messaging Would Likely or Definitely Help Organizations,<br>2002-2006 .....                                       | 16 |
| IT Organizations' Attitudes Toward Instant Messaging .....   | 19 |
| IT Organizations' Attitudes Toward Instant Messaging, 2002-2006 .....  | 19 |
| Concerns About Instant Messaging .....   | 20 |
| Key Drivers for Instant Messaging Use .....  | 23 |
| Importance of Instant Messaging for Business-to-Business, and Business-to-Consumer<br>Applications .....   | 24 |
| Areas in Which Instant Messaging Would Likely or Definitely Help .....   | 25 |
| Length of Time that IT-Deployed and Employee-Deployed Instant Messaging Systems Have<br>Been in Use .....  | 27 |
| Penetration of Consumer and Enterprise Instant Messaging .....   | 28 |
| Organizations' Plans for Replacing Consumer-Grade Instant Messaging Clients with<br>Enterprise-Grade Instant Messaging Systems .....             | 29 |
| Likelihood of Swapping Out Employees' Consumer-Grade Instant Clients for Enterprise-<br>Grade Instant Messaging in the 2007-2008 Timeframe ..... | 30 |



## List of Figures (cont'd.)

---

|   |    |
|---|----|
| Reasons That Organizations Choose Not to Replace Consumer-Grade Instant Messaging Clients.....  | 31 |
| “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?” ..... | 32 |
| Breakdown of Organizations With and Without Formal Policies Regarding Instant Messaging Use.....  | 34 |
| Organizations' Preferences for Deploying Enterprise-Grade Instant Messaging Capabilities Assuming Cost is not a Consideration.....  | 37 |
| Organizations' Preferences for Deploying Enterprise-Grade Instant Messaging Capabilities Assuming Cost is a Consideration.....  | 37 |
| “Is it acceptable in your organization to block all external instant messaging traffic?” .....  | 39 |
| “Is it possible in your organization to block all external instant messaging traffic?” .....  | 39 |
| Penetration of Various Capabilities Used with Instant Messaging.....  | 41 |
| Organizations' Reasons for Not Using Audio and/or Video Capabilities with Instant Messaging .....   | 43 |
| Perceived Importance of Integrating Various Applications with Instant Messaging.....  | 44 |
| Line-of-Business Applications with Which Instant Messaging is Currently Integrated or will be Integrated During 2007 and 2008 .....   | 45 |
| Importance of Various Instant Messaging Security Capabilities .....   | 46 |
| Views on the Acceptability of Encrypted Instant Messaging as a Substitute for Encrypted Email .....   | 47 |
| Reasons that Organizations Perceive Secure Instant Messaging is not an Acceptable Substitute for Secure Email .....   | 48 |
| Organizations' Perceived Importance of Open Standards-Based Instant Messaging Software Solutions .....  | 49 |
| Views on the Desirability of Achieving Instant Messaging Interoperability Through Federation or Standards.....  | 49 |
| Importance of Various Criteria in Selecting a Corporate Instant Messaging Solution .....  | 50 |
| Organizations' Views on the Importance of Presence in 2006 .....  | 54 |
| Organizations' Views on the Importance of Presence in 2007 .....  | 54 |
| Organizations' Level of Knowledge for Using Presence Outside the Context of Instant Messaging .....   | 55 |
| Organizations' Perceived Importance of Integrating Presence Into Other Applications, 2006 and 2007 .....  | 56 |
| “Does your organization develop and/or deploy any applications on top of your instant messaging/presence infrastructure?” .....   | 57 |
| Types of Information for Which Organizations Want to Leverage Their Instant Messaging System as a General Transport Mechanism.....  | 58 |
| Types of Information for Which Instant Messaging Would be Leveraged for the Delivery of Enterprise Data via a Publish/Subscribe Interface .....   | 59 |
| Factors Holding Back Greater Use of Presence.....   | 60 |



## List of Figures (concluded)

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|  |    |
|--|----|
| Sources on Which Organizations Would Depend Most to Integrate Presence with Critical Line-of-Business Applications .....                                     | 61 |
| Organizations' Perceived Desirability of Integrating Presence with Various Applications .....  | 62 |
| "Would your organization want its wireless instant messaging solution(s) to be integrated with presence distribution for other wireless applications?" ..... | 62 |
| Consumer IM-Enabled Organizations' Timeframes to Deploy New Enterprise-Grade Instant Messaging Systems .....   | 65 |
| Penetration of Telephone Integration with Instant Messaging, 2006-2009 .....   | 66 |
| Factors Holding Back Greater Use of Instant Messaging/Telephony Integration.....   | 67 |
| Organizations' Interest in the Use of Wireless Instant Messaging .....   | 68 |
| Types of Users Who Would Employ Wireless Instant Messaging in a Significant Way.....   | 69 |
| Organizations' Perceived Importance for Wireless/Mobile Instant Messaging Capabilities .....   | 70 |
| Organizations' Interest in Various Potential Instant Messaging Platforms .....   | 71 |
| Organizations' Plans to Deploy an Instant Messaging-to-SMS Gateway.....  | 72 |
| Organizations' Planned Use of an Instant Messaging-to-SMS Gateway.....   | 72 |
| Organizations' Views on the Long-Term Impact of Instant Messaging on Email Traffic .....   | 73 |
| Instant Messaging Clients in Use in 2006.....  | 75 |
| Penetration of Various Instant Messaging Clients, 2002-2006 .....  | 76 |

## List of Tables

---

|  |    |
|--|----|
| Desirability of Various Instant Messaging Client Models for Different Groups in an Organization..... | 17 |
| Importance of Various Attributes of an Instant Messaging System.....                                 | 33 |
| Preferences for Managing Various Instant Messaging-Related Services.....                             | 38 |
| Vendors of Instant Messaging and Presence Products and Services.....                                 | 77 |



## **About Osterman Research, Inc.**

Osterman Research, Inc. provides market research, cost modeling, benchmarking and related services to vendors of technology-based 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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