



## The UK Messaging Market, 2006-2009

### Report Focus

This report focuses on the messaging market in the United Kingdom. Osterman Research conducted two separate surveys specifically for this report and presents the findings of that research in this document. Because early subscribers to this study were provided the opportunity to submit questions that were fielded in the surveys conducted for this report, the research focus of this report was shaped to some extent by these organizations that represent a wide range of vendors in the messaging space. Although this report focuses on the market for messaging technologies in the United Kingdom, we have provided some comparative data with the North American market that was developed by Osterman Research from a variety of other surveys conducted during 2005.

### Key Findings Presented in this Report

- The vast majority of organizations in the United Kingdom are currently managing their various messaging services internally and plan to continue to do so through the end of 2007. However, organizations plans to significantly increase their use of managed messaging services, particularly for email security services, archiving and storage management.
- Of the seven most serious problems facing organizations today, five are related to storage. While spyware and spam are also serious problems, they ranked as only the fifth and sixth most serious problems in the primary survey conducted for this report.
- Microsoft Exchange is the dominant messaging platform in use by the organizations surveyed for this report.
- Only about one-third of organizations believe that they are well equipped or very well equipped to address the regulatory, human resources and legal issues surrounding email.
- Instant messaging (IM) clients are used in about one-half of organizations; this figure will climb to just over 60% by the end of 2006.
- About one-half of organizations are concerned or extremely concerned about the potential for sensitive information being sent in an unauthorized manner through the use of approved and supported applications, such as email.
- Two out of five organizations currently has and enforces a messaging retention policy, while another one-fifth of organizations plan to have and enforce such a policy during 2006.



- Between Fall 2004 and Fall 2005, messaging-related storage increased by a median of 30%. However, one of out five organizations experienced growth in messaging storage that exceeded 50% during this period.
- Although only one in five organizations currently has a email and/or IM archiving system currently in place, another one in five organizations plan to deploy such a system by late 2006 and another one in 12 organizations plan to do so by late 2007.
- The vast majority of organizations have no plans to migrate to a new messaging system by late 2007. However, one in eleven organizations is planning to migrate to a new messaging system by late 2006, while a slightly greater proportion plan to migrate to a new system by the end of 2007.
- Much like the case in the North American market, Osterman Research believes that there will be substantial growth in the hosted/managed services market for various messaging services in the UK market, including complete messaging services in which all backend services are managed by a third party using their own data center facilities; email hygiene services, in which anti-virus, anti-spam and related services are managed by a hosted provider while messaging servers are managed internally; and hosted/managed email and IM archiving services.

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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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