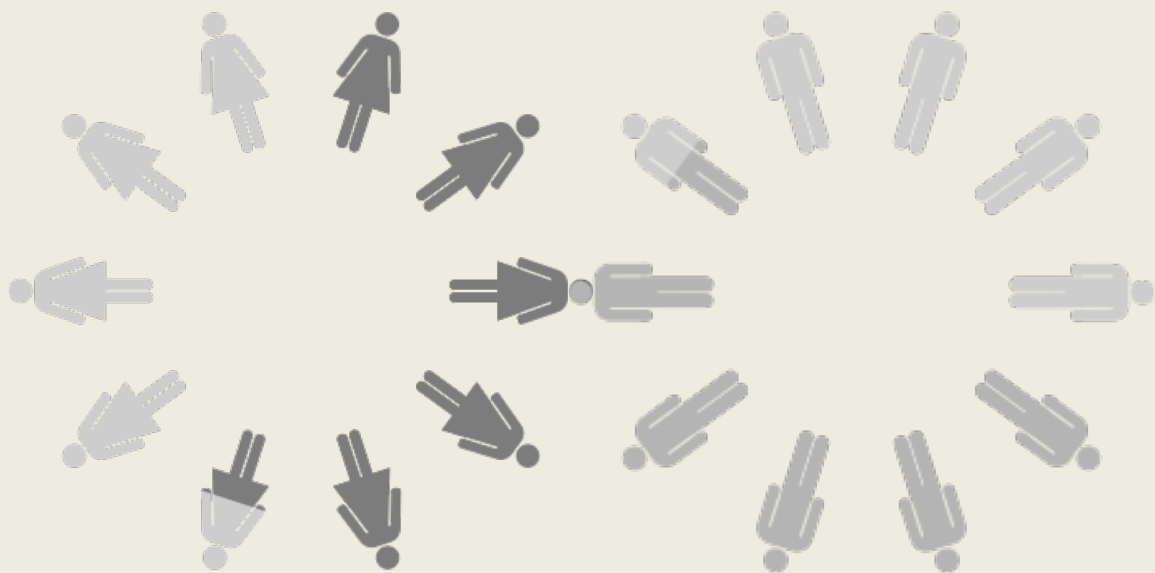


Results of an End User Survey About Communications Practices

An Osterman Research Industry Survey Report

August 2016



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OVERVIEW

Osterman Research conducted a market research survey in July 2016 to understand end user behavior in the context of the corporate and personally owned information systems that users employ to do their work. Our focus was on primary information systems like email and how it is changing over time, the information overload that users may or may not experience in email, the devices that they use, the encryption capabilities available to end users, file sync and share tools, Skype and related tools, users' perceptions about IT attitudes toward BYOD, security awareness training, and other key aspects of end users' interactions with work-related communication and collaboration systems.

Our goal was to survey both technical and non-technical across a wide range of industries.

ABOUT THIS INDUSTRY SURVEY REPORT

This survey report presents the results of a primary market research survey conducted with members of the Osterman Research survey panel during July 2016. The survey was conducted with 190 members of the panel, located primarily in North America. Here are the key details of the survey:

- Mean number of employees at the organizations surveyed: 19,449
- Mean number of email users at the organizations surveyed: 13,547

We surveyed respondents across a wide range of industries, as shown in Figure 1.

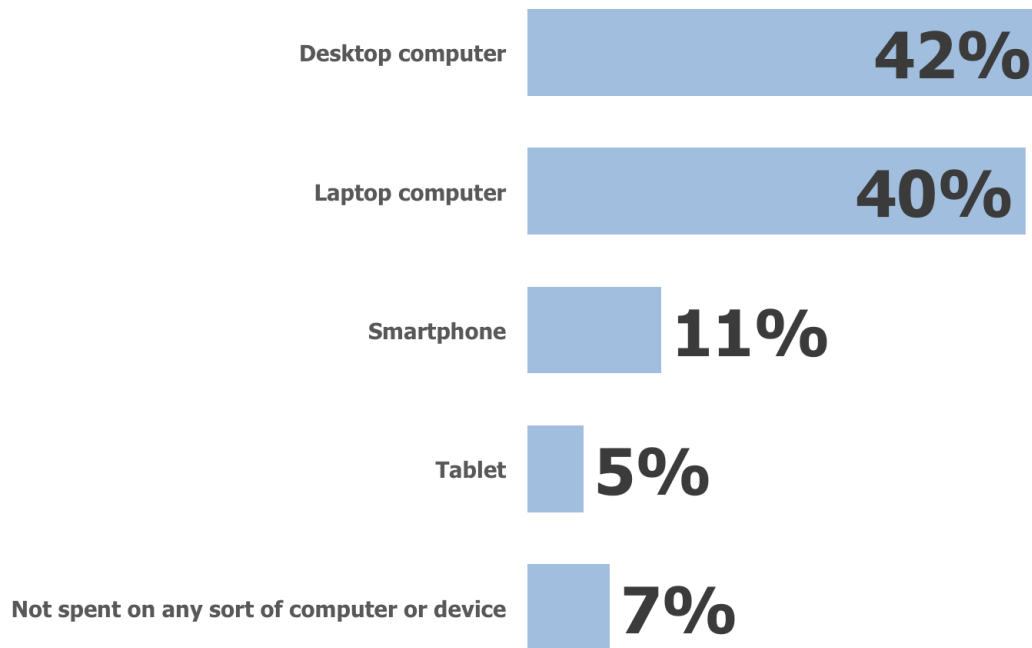
Figure 1
Industries Surveyed

Industry	%
Healthcare	15.9%
Financial services	13.7%
Technology	12.1%
Manufacturing	11.0%
Government	9.9%
Education	9.3%
Insurance	5.5%
Retail	3.3%
Consumer	2.7%
Energy	2.7%
Transportation	2.7%
Automotive	1.6%
Telco	1.6%
Real Estate	0.5%
Other	7.1%

Source: Osterman Research, Inc.

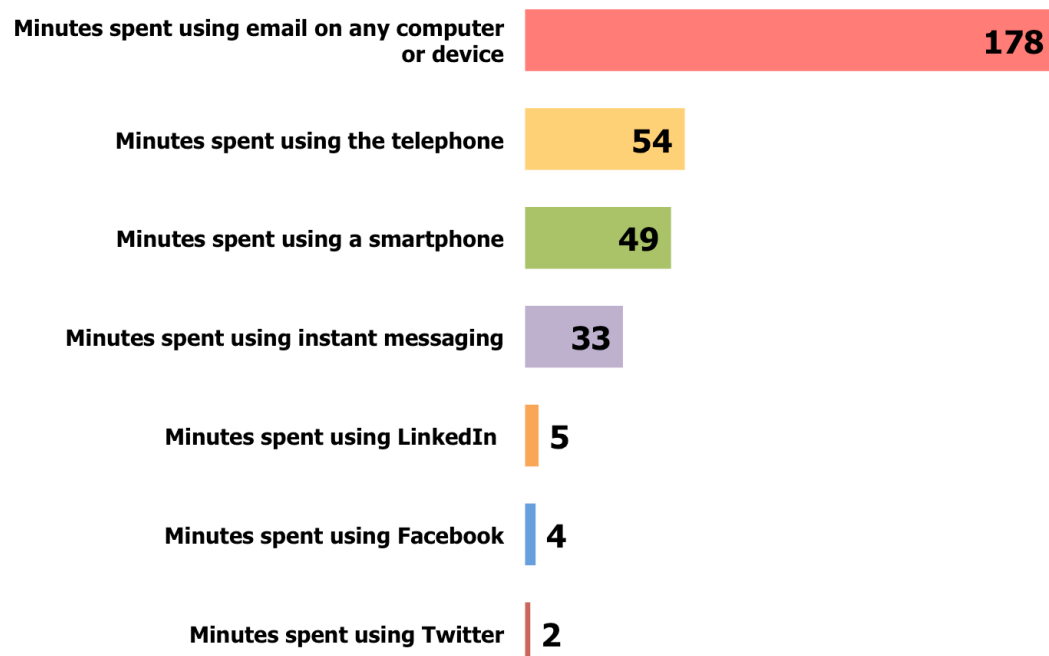
RESEARCH FINDINGS

Figure 2
Percentage of Users' Typical Workday Spent Using Various Devices



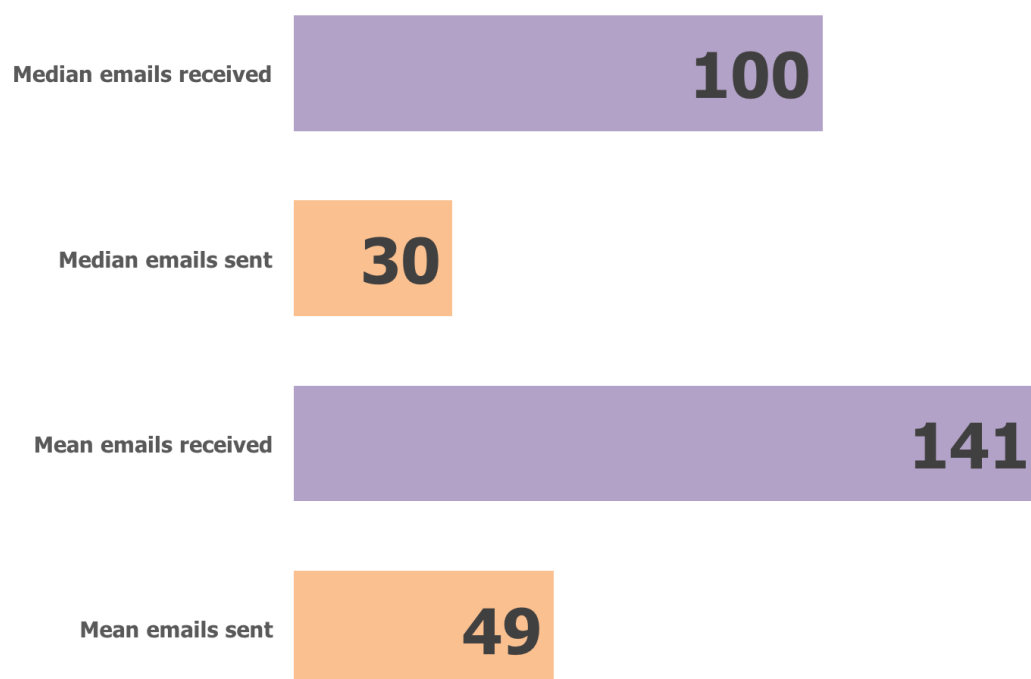
Source: Osterman Research, Inc.

Figure 3
Number of Minutes Spent Using Tools for Corporate / Work Purposes on a Typical Day



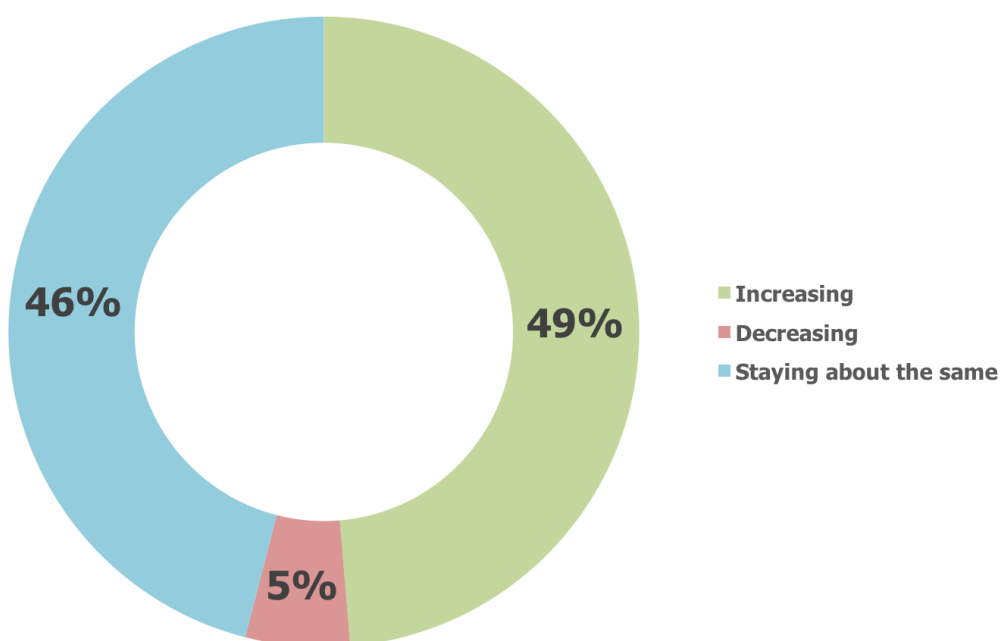
Source: Osterman Research, Inc.

Figure 4
Number of Work-Related Emails That a User Sends and Receives on a Typical Workday



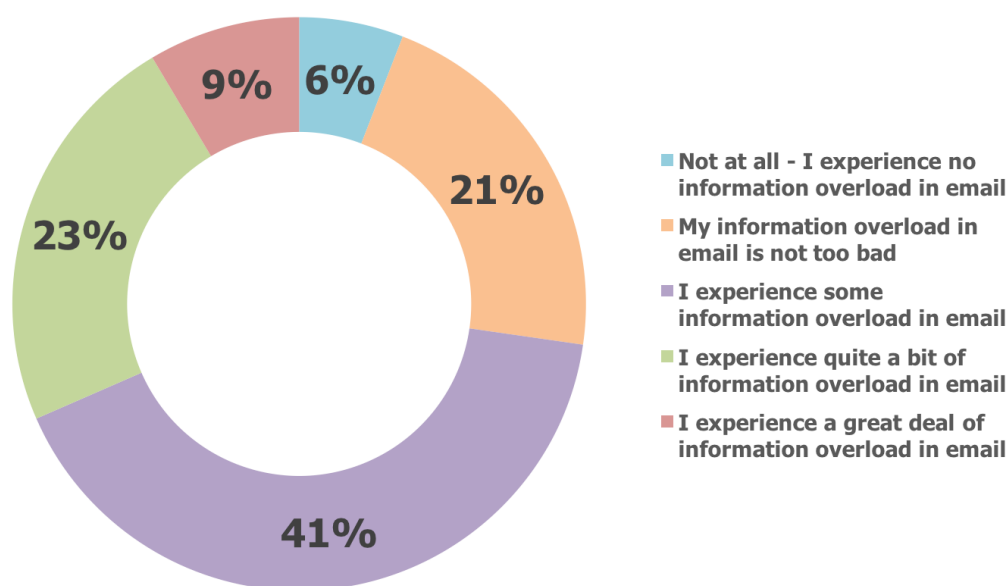
Source: Osterman Research, Inc.

Figure 5
Comparing Use of Email From One Year Ago to the Present



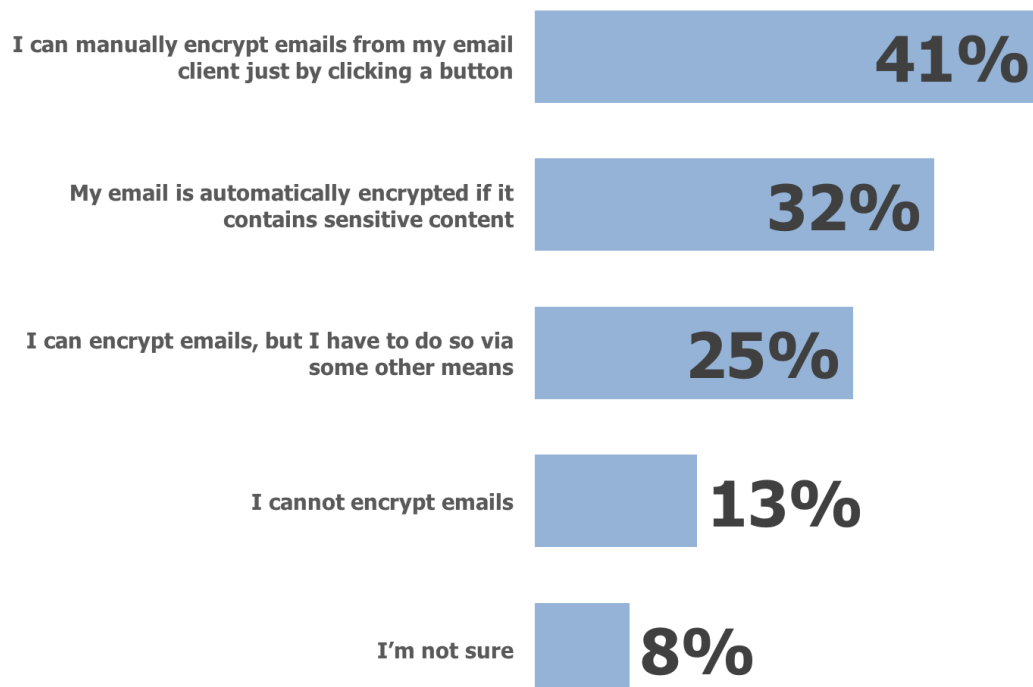
Source: Osterman Research, Inc.

Figure 6
The Extent to Which a User Experiences "Information Overload" in Email



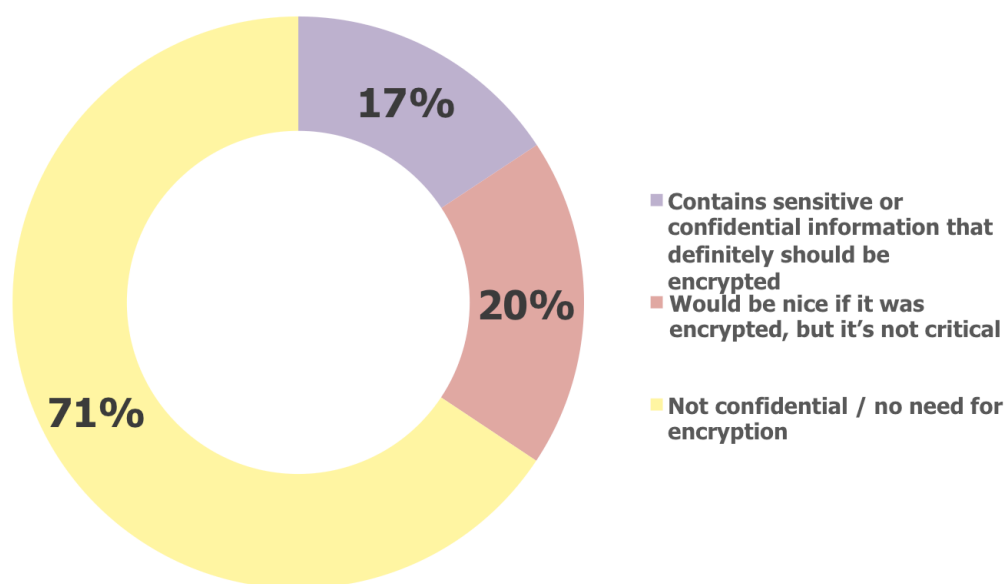
Source: Osterman Research, Inc.

Figure 7
Ability to Encrypt Email With Sensitive Content



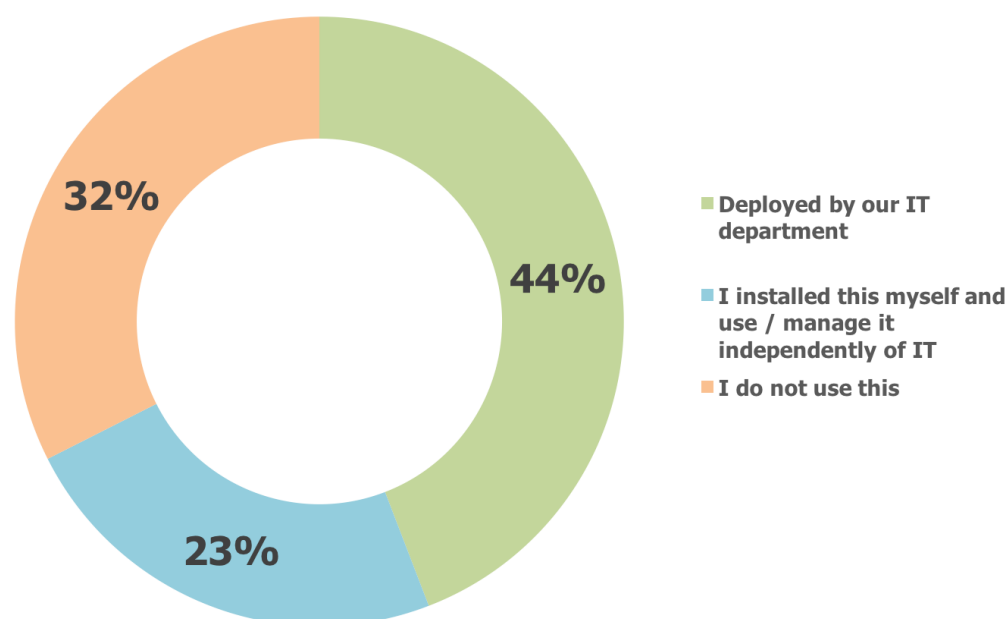
Source: Osterman Research, Inc.

Figure 8
Breakdown of Email Sent During a Typical Workweek



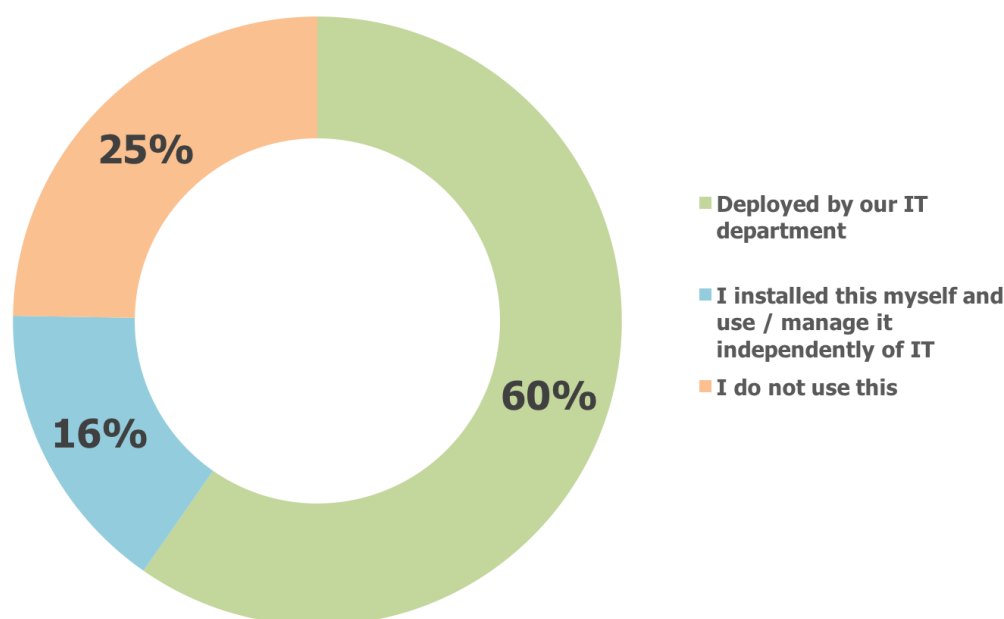
Source: Osterman Research, Inc.

Figure 9
Primary Way that Dropbox, OneDrive, Google Drive or Other File Sync and Share Tools are Deployed and are Currently Managed



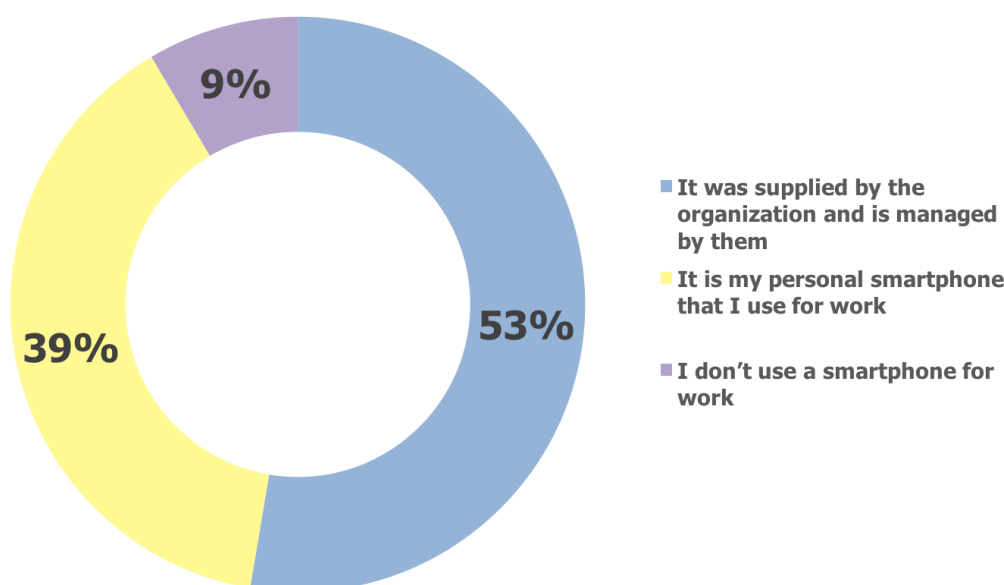
Source: Osterman Research, Inc.

Figure 10
Primary Way that Skype or Similar Voice / Instant Messaging Tools are Deployed and are
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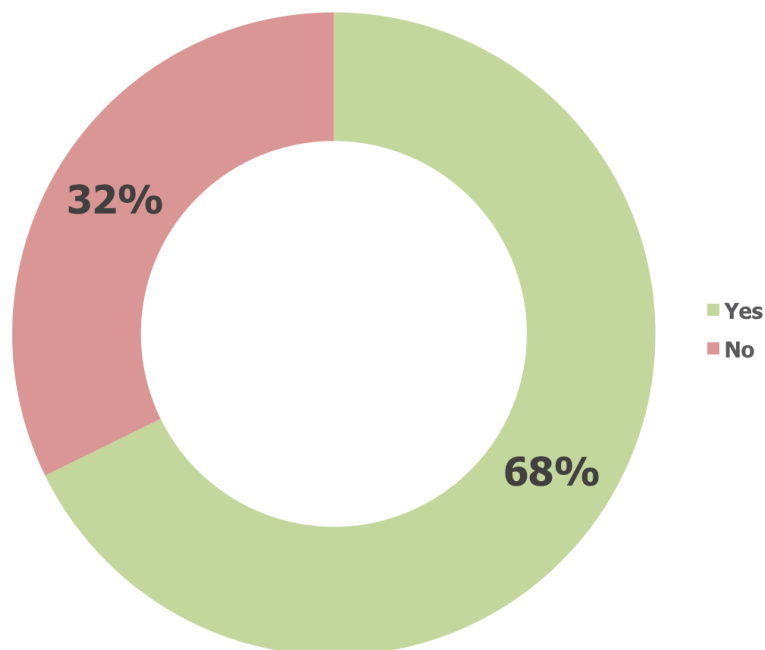
Source: Osterman Research, Inc.

Figure 11
Primary Smartphones that are Used for Work Purposes



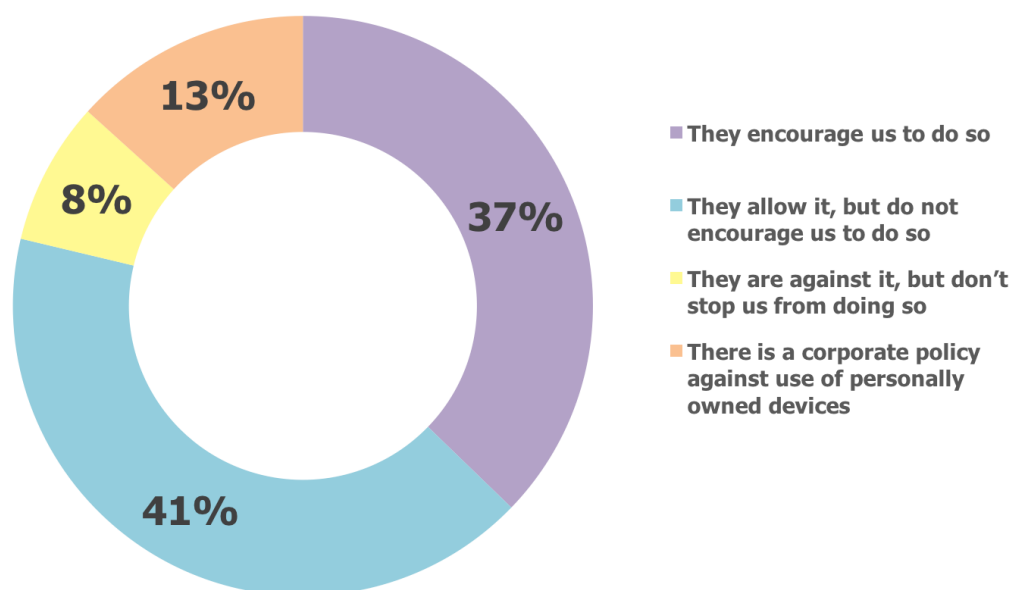
Source: Osterman Research, Inc.

Figure 12
Use of Applications for Work Purposes that a User Personally Downloads on a Mobile Device



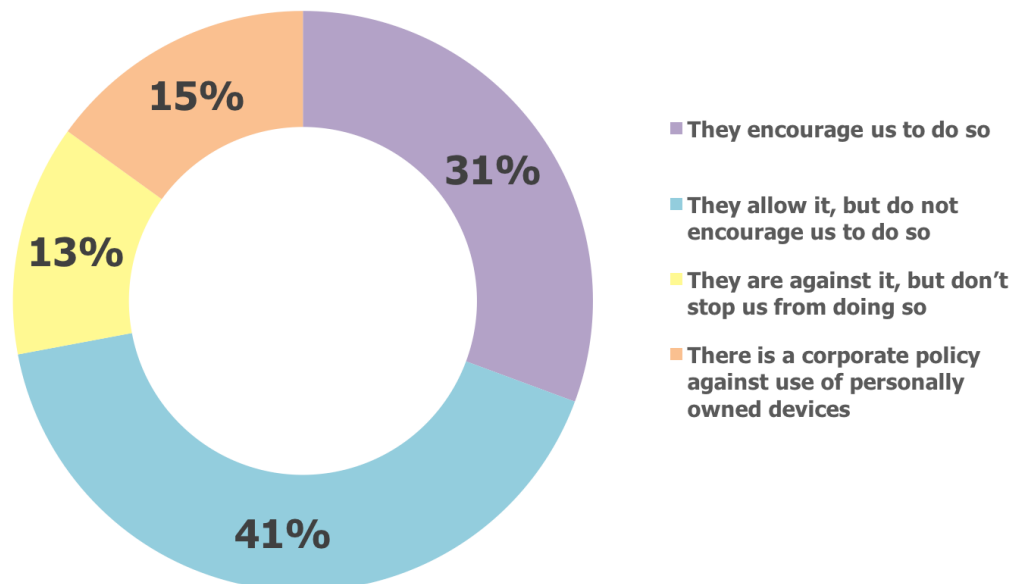
Source: Osterman Research, Inc.

Figure 13
IT Department's CURRENT Attitude Toward Employees Using Their Own Smartphones and Tablets for Work Purposes



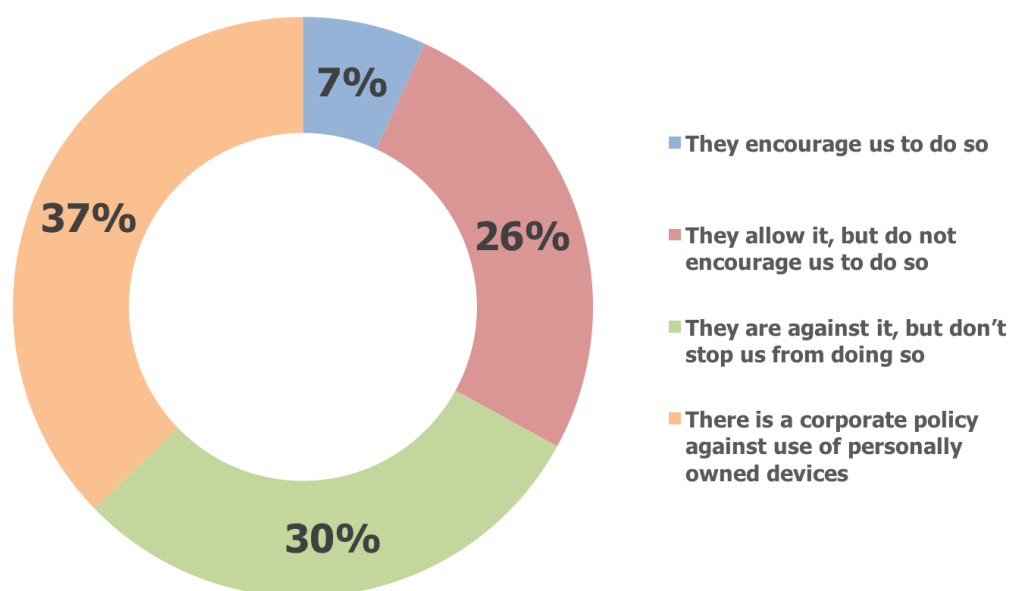
Source: Osterman Research, Inc.

Figure 14
IT Department's Attitude ONE YEAR AGO Toward Employees Using Their Own Smartphones and Tablets for Work Purposes



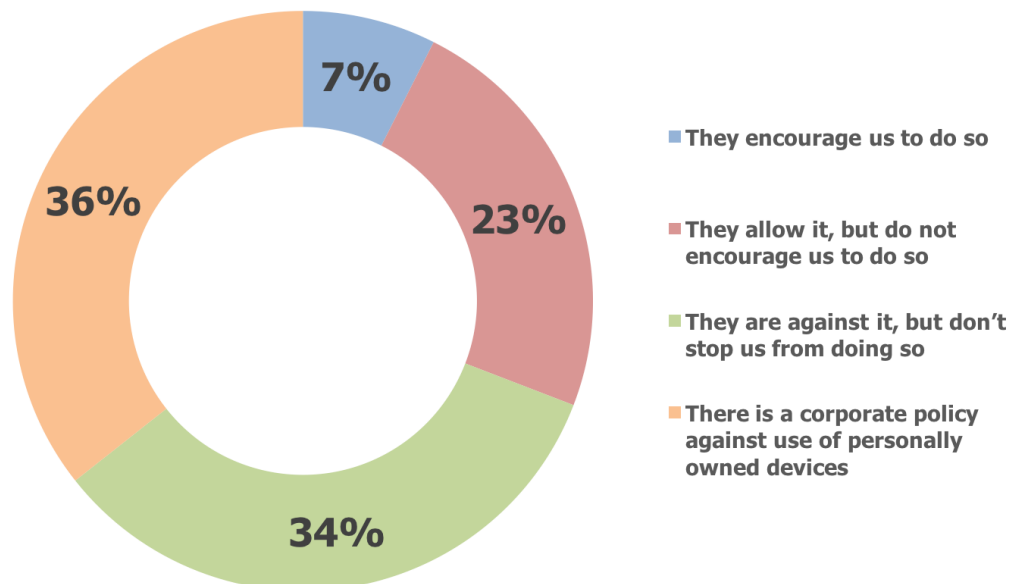
Source: Osterman Research, Inc.

Figure 15
IT Department's CURRENT Attitude Toward Employees Deploying Their Own Applications for Work-Related Purposes, such as Dropbox, Skype, Cloud Storage, etc.



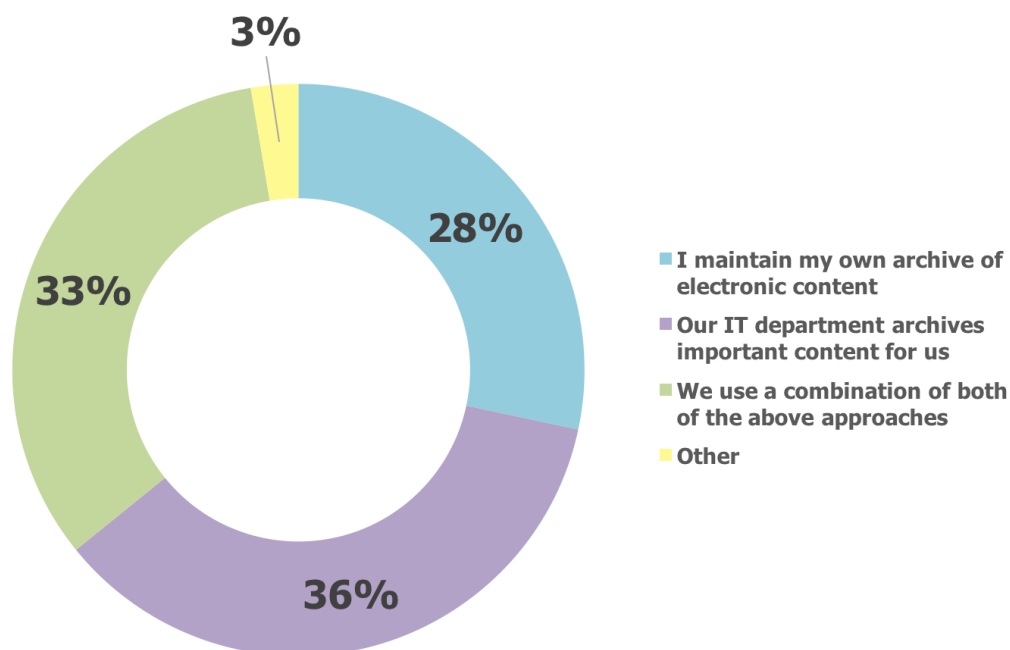
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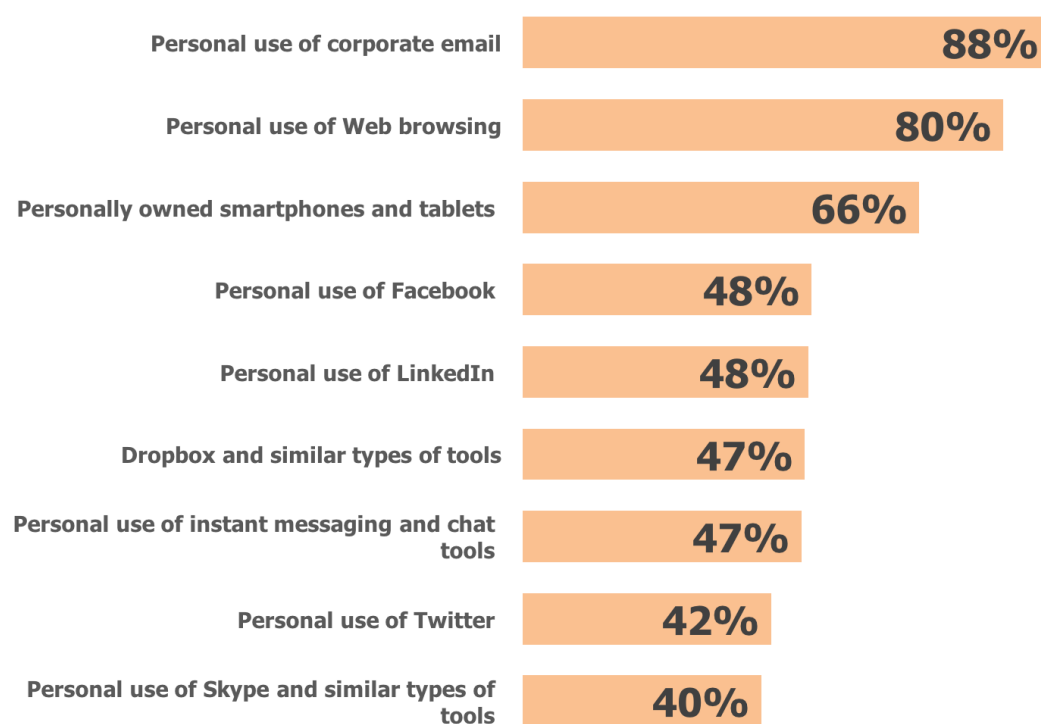
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Figure 17
Best Description of How to Retain Important Emails, Files and Other Electronic Content for Long Periods



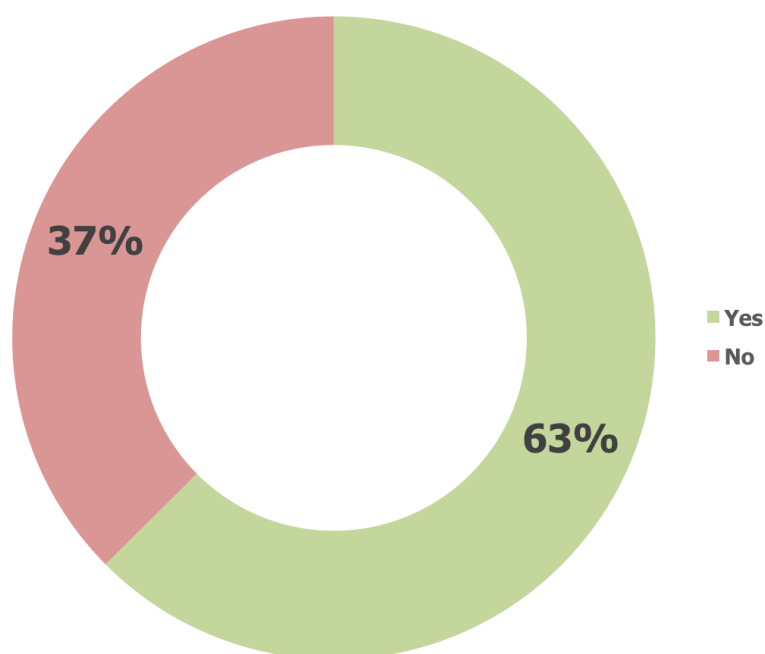
Source: Osterman Research, Inc.

Figure 18
Formal Acceptable Use Policies in an Organization



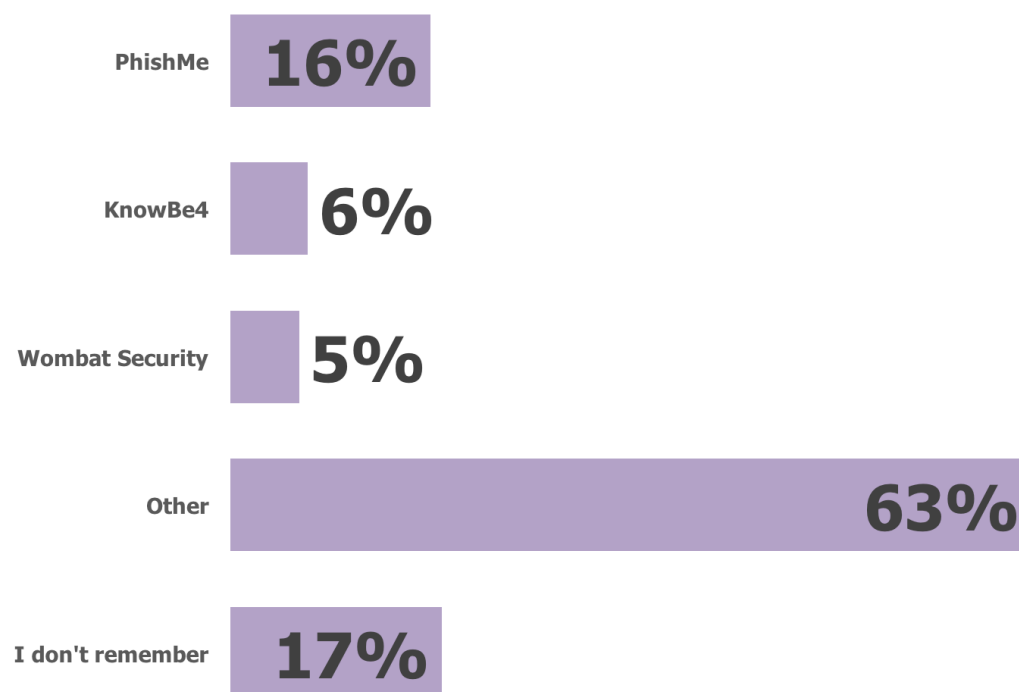
Source: Osterman Research, Inc.

Figure 19
Users Who Have Experienced Formal Security Awareness Training in Organizations, Such as Phishing Attempts



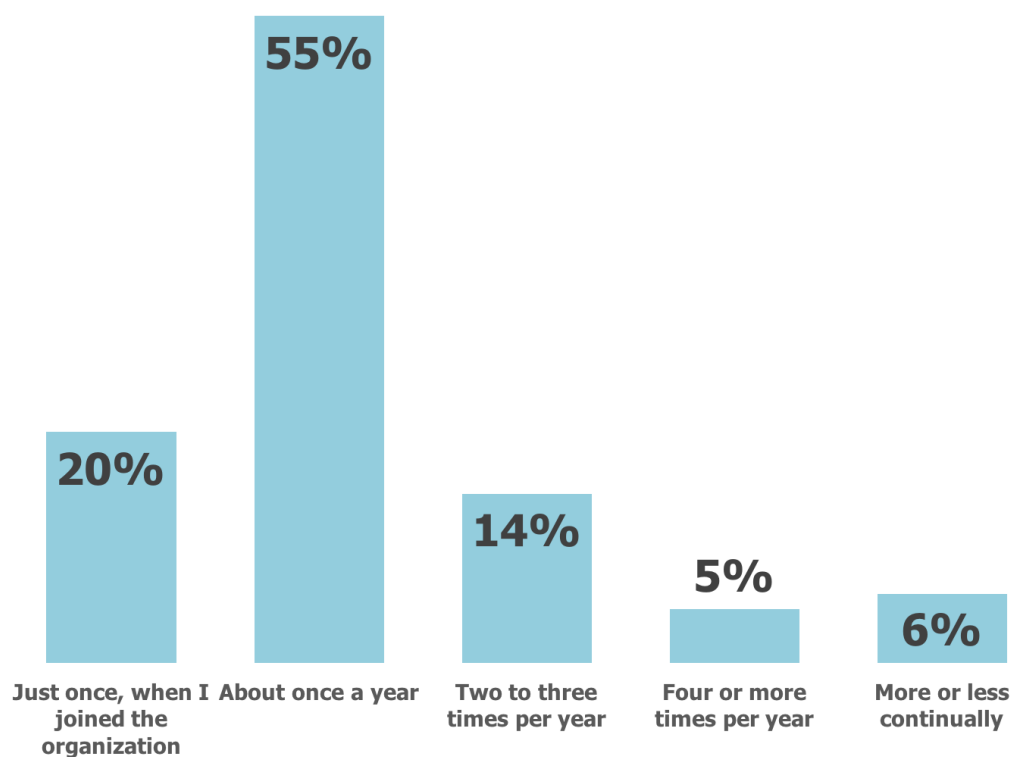
Source: Osterman Research, Inc.

Figure 20
Solutions Used as Part of Formal Security Awareness Training



Source: Osterman Research, Inc.

Figure 21
Frequency of Formal Security Awareness Training Offered by Organizations



Source: Osterman Research, Inc.

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