READER STUDY

Communication & Collaboration
Summary of Results from 3,425 Online Respondents
June 2005

MAIN POINTS

Email is confirmed as a business critical application
The majority, 72%, of respondents said that e-mail is critical to their business, with a further 23% saying it is important. This is probably not going to come as news to many people, but it does underline the degree to which businesses have become reliant on electronic communications and the internet for effective working.

Organisations are opening up their information repositories to external parties
Around 90% of organisations make use of information repositories such as file servers, shared data in Outlook/Notes or content held in portals such as Microsoft Sharepoint. About 30% of organisations are taking this one step further and granting access to customers, suppliers, partners and other external entities. This bodes well for the future of portal technologies such as Sharepoint and IBM's Workplace that allow controlled and secure information access by third parties from outside the organisation's firewall.

Audio conferencing is a generally accepted collaboration mechanism - but video conferencing is not and most video conferencing suites have turned out to be white elephants
Almost half of respondents indicate frequent use of audio conferencing, with about 8% saying it is their default collaboration mechanism when three or more people need to interact in real-time. Many respondents, over 80% of those from large corporates, for example, tell us they have dedicated video conferencing facilities installed, but they are hardly used in 60% of cases.

Use of instant messaging (IM) appears to be widespread, and IM is starting to be embraced as a formal part of organisations' communications landscapes
Over 40% of respondents told us that their organisations formally accepted the use of instant messaging, with about a quarter indicating proactive and extensive use. Another 26% were aware that IM was being used, but couldn't say to what degree. Instant messaging use was particularly associated with very large organisations with an obvious need for efficient desk to desk communication and an ability to invest in an enterprise class IM infrastructure, along with smaller organisations working in a more relaxed IT regime and able to take advantage of public IM services.

Use of integrated desktop collaboration tools is becoming quite common
Close to half of respondents said they use tools such as shared whiteboards, Net Meeting, web-casting, etc to facilitate ad hoc electronic meetings. Such tools are also starting to be used for communication externally, with just under a quarter employing them to collaborate with customers, partners, etc.

**Interest in mobile "push-to-talk" is very limited**
Just over 15% of respondents could see value in "push-to-talk" services, the ability to talk to named people from your mobile phone by simply pressing a button rather than dialling a number – just like a walkie-talkie. About 20% had not heard of this kind of service, however, with the remainder not really seeing the relevance of it to their business.

My word is not necessarily my bond, but my Email definitely is!
When asked which forms of communication were valid for formal or legal purposes, the majority of respondents identified letters, Emails and faxes as falling into this category. Less than half, however, considered telephone or verbal face-to-face exchanges as being binding, and only 9% considered instant messages as forming part of the formal record. It will be interesting to see how these views change over time as compliance regulations continue to extend the types of communication they cover.

DETAILED FINDINGS ARE PRESENTED IN THE FOLLOWING PAGES

Figure 1

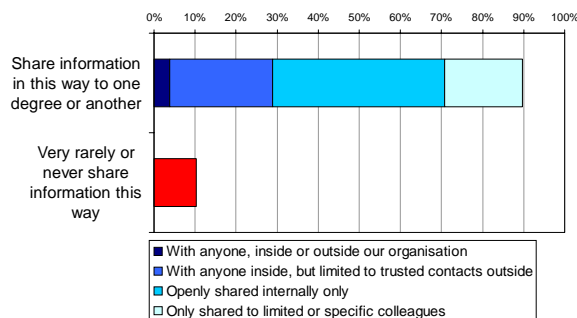**Who do you frequently need to share information with?**
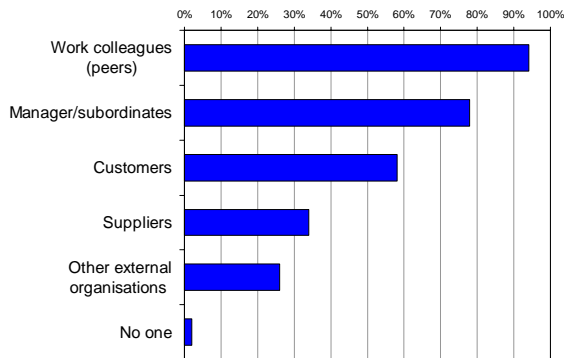
The majority of information sharing requirements tend to be internal, between peers or up and down the management chain. Over half of respondents, however, said they frequently had to share information with customers, and another third highlighted information sharing requirements with suppliers. This underlines the need for efficiency in terms of both internal and external communication.

Figure 2

**How important is email to your business communications?**
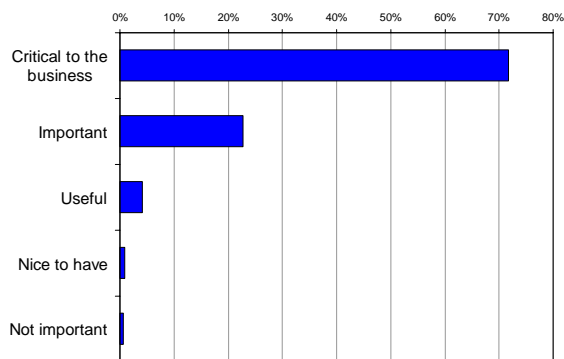
Just in case there was any doubt, respondents made it pretty clear that Email is a business critical application in the majority of organisations. There was little variation here in terms of company size, geography or type of industry.

Figure 3

How much do you use information repositories on the network to share data - such as shared file servers, shared directories in Outlook, Lotus Notes or Sharepoint?

■ With anyone, inside or outside our organisation
■ With anyone inside, but limited to trusted contacts outside
■ Openly shared internally only
□ Only shared to limited or specific colleagues

From an internal information sharing perspective, the vast majority of organisations are making use of information repositories. Just under 30% of respondents share information in their repositories externally, which suggests a significant need for portal solutions that enable access to information from outside the firewall in a controlled and secure manner.

Figure 4

What are the main reasons you use remote or collaborative communication tools?
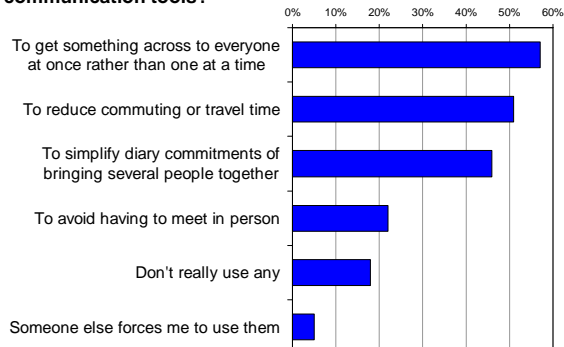

Moving beyond Email and basic information repositories, about four out of five respondents saw some kind of value in more advanced collaborative capabilities. Some of this is simply to do with coordination of activity, such as helping to organise meetings, but there are indications that collaborative communication tools are often viewed as a means of avoiding meetings and unnecessary travel.

Figure 5

How much do you use audio only conference calls involving 3 or more people in place of face to face meetings?
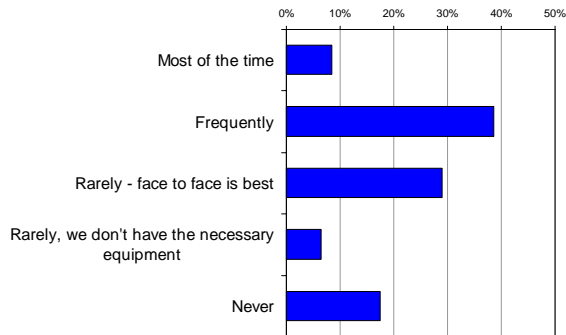
Looking at specific capabilities gives us a feel for the ways in which communication and collaboration are taking place. To begin with, about half of our respondents are making extensive use of audio conferencing, with about 8% using this as the primary means of collaboration. This is an area in which IP Telephony is likely to have a strong impact in the future.

Figure 6

How much do you use audio only conference calls involving 3 or more people in place of face to face meetings?
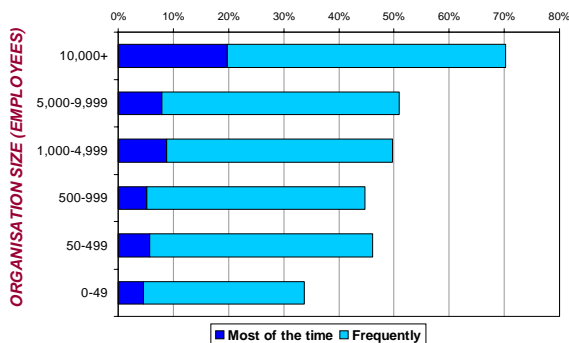
When we look at use of audio conferencing by size of organisation, we can see that use is significantly higher amongst large corporates, which is likely to be a function of the infrastructure that is in place. Lower cost IP Telephony solutions and the continued emergence of conferencing services from telecommunications companies may redress this imbalance over time.

Figure 7

How do you use video conferencing to supplement face to face meetings?
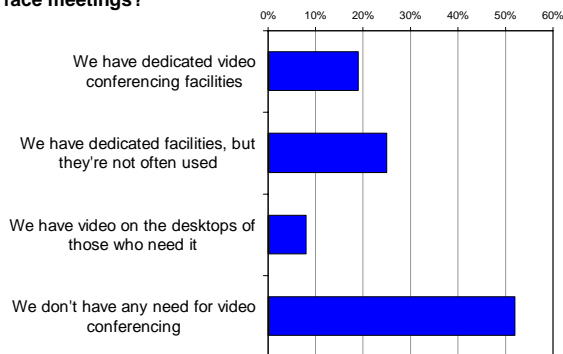
Few organisations currently use videoconferencing on the desktop and anecdotal feedback suggested a significant amount of scepticism with regard to both the need and the user experience. Having said this, almost half of respondents indicated the presence of more dedicated videoconferencing facilities, though most of them are not used that often, questioning the suitability of this type of technology for general use.

Figure 8

How do you use video conferencing to supplement face to face meetings?
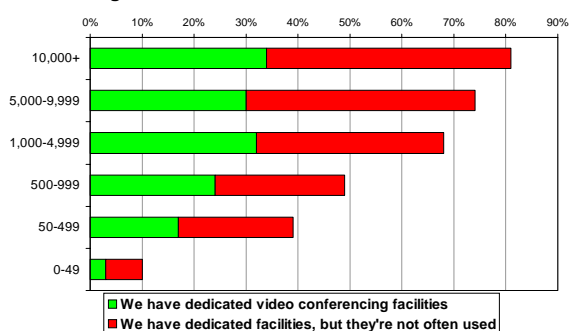
Not surprisingly, with the cost of such systems, activity is focused in the larger organisations, though it appears that most of the videoconferencing suites installed have become expensive white elephants, regardless of organisation size.

Figure 9

How much use do you make of Instant Messaging (IM) in the office?
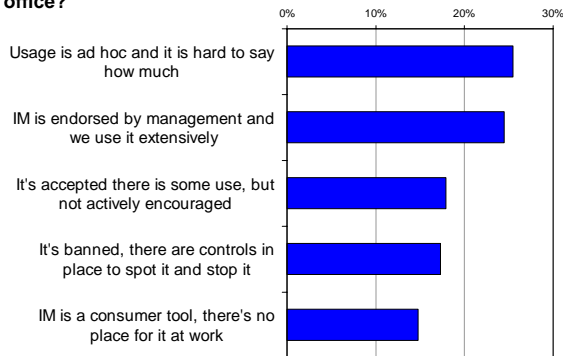
The story on instant messaging is much more positive. There appears to be some level of usage in about 70% of organisations, although many find it hard to determine how much activity there actually is, indicating that much of it is user driven. About 40% of organisations officially recognise the use of IM, however, with about a quarter actively promoting it.
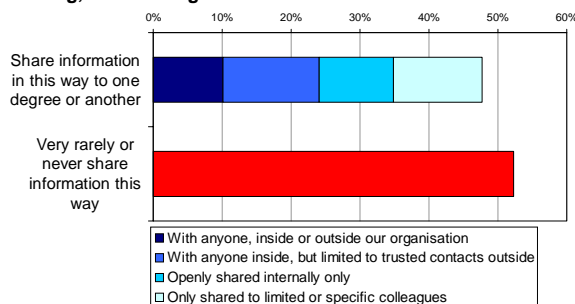
Figure 10

How much use do you make of Instant Messaging (IM) in the office?

IM is endorsed by management and we use it extensively
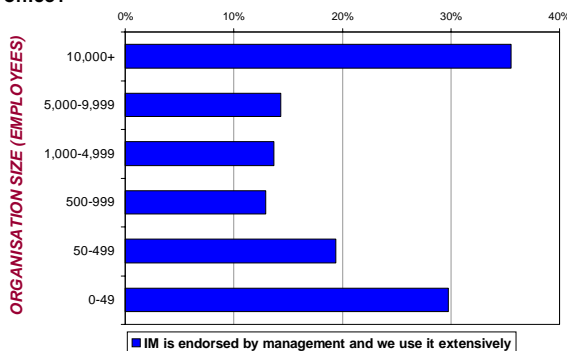
What is very interesting is a polarisation in terms of IM use, which is much more prominent at the extremes of organisation size. The most likely explanation for this, is that large corporates with many desk based employees that are physically separated have taken advantage of enterprise class IM to improve internal communications, whilst smaller organisations with fewer IT constraints, are using public IM services.
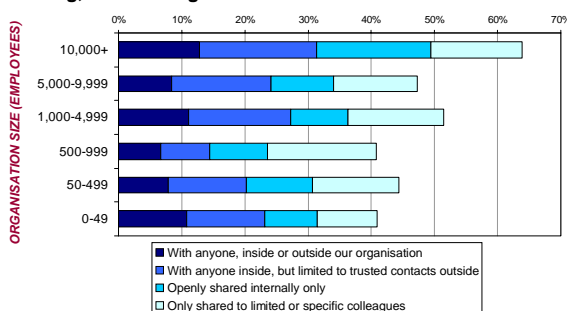
Figure 11

How much do you use tools to share information electronically in an ad hoc electronic meeting so that two or more people can collaborate - such shared whiteboards, net meeting, web-casting etc?

- With anyone, inside or outside our organisation
- With anyone inside, but limited to trusted contacts outside
- Openly shared internally only
- Only shared to limited or specific colleagues

Moving on to more coherent and comprehensive desktop collaboration, about half of respondents indicate adoption for internal use, with about a quarter highlighting external use of such solutions.
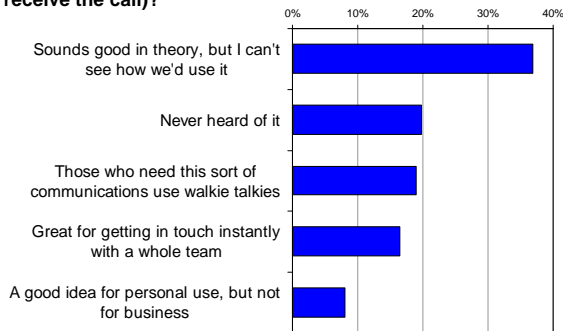
Figure 12

How much do you use tools to share information electronically in an ad hoc electronic meeting so that two or more people can collaborate - such shared whiteboards, net meeting, web-casting etc?

- With anyone, inside or outside our organisation
- With anyone inside, but limited to trusted contacts outside
- Openly shared internally only
- Only shared to limited or specific colleagues

Again, we see indications that the large corporates possibly have a greater need along with an infrastructural advantage here. Across-the-board, the proliferation of integrated collaboration solutions stacks from the likes of IBM and Microsoft that are more and more embracing this type of functionality is likely to drive adoption further.

Figure 13

What do you think of push talk on mobile phones (where the talker presses a button and instantly one or more people receive the call)?

Turning our attention more towards the mobile worker, the wireless operator community has been testing the idea of "push to talk" for a while now, but it seems as if they are only striking a chord with a relative minority.

Figure 14

What do you think of push talk on mobile phones (where the talker presses a button and instantly one or more people receive the call)?
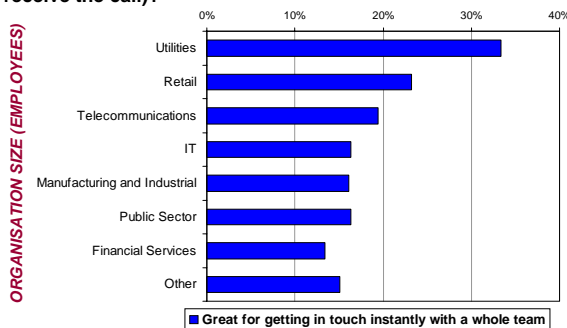
When we look at the variation in responses by industry vertical, there is a suggestion that "push to talk" may be being viewed as a longer range option by those already using two-way handheld radio technologies. This suggests that outside of the consumer sector, mobile operators are going to have to be very targeted about their push to talk offerings.

Figure 15

Which of the following do you treat as valid for formal or legal communications?
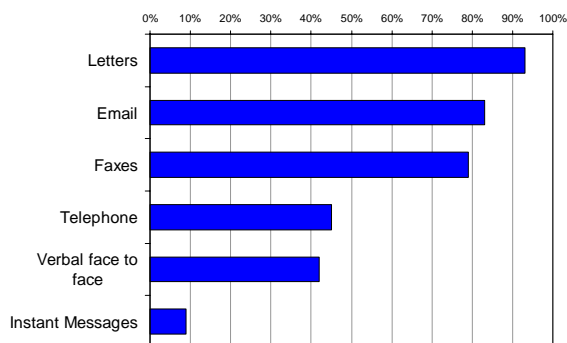
With an increasing focus on governance and compliance, it is interesting to see which forms of exchange are considered to be valid for formal or legal communications. What is clear from this is that the more real-time communication mechanisms are generally considered to be less valid, with instant messaging being dismissed by the vast majority. We should probably take note that regulators are increasing disagreeing with this view.

Conclusions

The outcome from the research points to companies and individual users making a high degree of usage of different communication and collaborative tools within their work. That certain tools such as videoconferencing have not found broadscale adoption reflects the high costs and historical issues with such technologies. On the other hand, the ad-hoc usage of emerging tools such as IM points to possible governance and compliance issues in the future. This is further backed up by the viewpoint that telephone conversations and IM do not constitute a "legal" communication – a view that could lead to major issues.

Overall, the majority of users see collaboration and communication tools for what they are – tools. They are open to trying new tools, but are pragmatic in their approach, setting aside those which show no gains for them in their personal work areas. For companies, there is a need to create guidelines as to which tool is the right one for the job, along with policies and procedures for the more transactional areas of work, to ensure a controlled, audit-capable environment for the future.

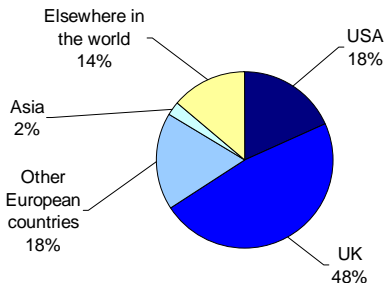# Respondent Profiles

Figure 16

Respondents by Geography

Figure 17

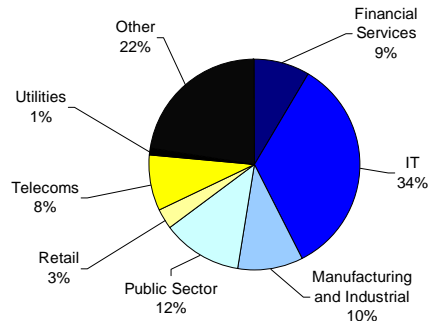**Respondents by Industry**

Figure 18
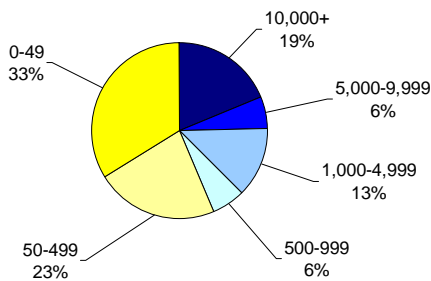
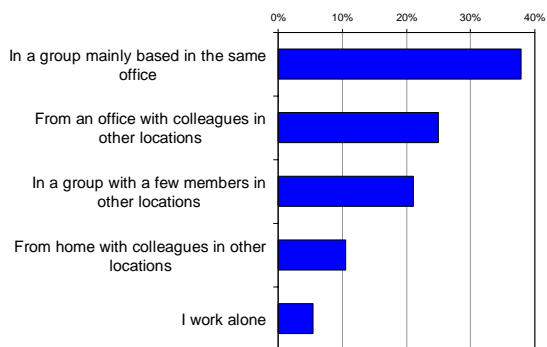**Respondents by Number of Employees**

Figure 19

What best describes the way you work with colleagues?

Methodology and Further Information

The information presented in this document was gathered from an online survey of readers of The Register internet news site (www.theregister.com) in June 2005.

Information was collected, analysed and reported by Quocirca Ltd, the independent industry analyst firm.

More details of Quocirca and reports of other Quocirca research available free of charge may be found at www.quocirca.com.

Acknowledgements

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