Mobile Messaging Market Trends, 2008-2011

Report Focus

This report focuses on demand drivers for mobile messaging in the North American workplace. The research conducted for this report, as well as the report itself, is 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.

The research conducted for this report included two surveys: a survey conducted with IT decision makers and another survey conducted with end users of mobile messaging platforms.

Key Findings and Trends Discussed in this Report

➢ **Mobile Device Use Will Grow Significantly**
   The proportion of the corporate workforce that uses company-supplied mobile devices will increase from just under one-quarter of users to nearly 40% of workers by mid-2010. Among workers that use company-supplied mobile devices, the proportion that use them in the workplace will increase from 41% to more than one-half of workers by 2010.

➢ **Not Just Handheld Devices**
   A wide variety of mobile devices and applications will see significant growth during the next two years, including company-supplied laptops with Wi-Fi capabilities (growing to 37% of users), wireless instant messaging (growing to 18% of users), and Java-enabled mobile devices (growing to 13% of users).

➢ **Multiple Devices Will be Supported**
   RIM BlackBerry devices dominate current support for mobile devices in the workplace, followed by Windows Mobile devices, PalmOS-based devices and the Apple iPhone. By 2010, Osterman Research expects slightly reduced support for the BlackBerry (although it will continue to dominate other platforms), continued strong support for Windows Mobile devices and significantly reduced support for PalmOS-based devices. However, Symbian-based devices will significant growth in the proportion of organizations supporting them and more than double the current support for the iPhone.

➤ **BlackBerry Devices Dominate Current Use of Mobile Devices**
   More than 50% of the mobile device users surveyed employ BlackBerry devices, follow
   by Windows Mobile devices and Treos. At present, the iPhone is used by only about
   5% of corporate users, but Osterman Research expects significant growth in the use of
   the iPhone over the next two years.

➤ **Users Check Mobile Email Frequently**
   Our research found that 47% of mobile device users check their mobile more than 10
   times per day while at work, while 10% check mobile email more than 40 times each
   day when at work. After hours during the evening, 37% of mobile users check their
   mobile email more than 10 times each day. Even on the weekend, 47% of mobile
   users check their mobile email more than 10 times per day.

➤ **Mobile Devices Go On Vacation**
   Surprisingly, only 4% of mobile device users never take their mobile device on
   vacation with them, while 20% sometimes do so and 76% always do so.

➤ **Mobile Devices are Used Everywhere…Even in Embarrassing Places**
   Mobile device users use their devices in a wide variety of interesting an unusual places:

   o   79% have used their mobile device in the bathroom
   o   77% have done so while driving (when the car is moving)
   o   41% have done done so on a commercial flight while in the air
   o   16% have done so during a funeral or memorial service
   o   11% have done so during a *romantic* moment

➤ **Many Users' Mobile Devices are Indispensable**
   We asked mobile devices users what they would do if they found they had forgotten
   their mobile device after they got to work. One in five users would immediately return
   home to retrieve their device, another 9% would have someone from home bring it to
   them and 23% would alert people that they did not have their mobile device that day
   and would not be as reachable.

➤ **Mobile Devices are Critical to Decision Makers**
   If an organization's mobile device or service was down, more than 80% of respondents
   told us that this downtime would have an impact on their senior managers' ability to
   make critical, time-sensitive decisions – one in ten told us it would have a very serious
   impact. Only 4% of respondents indicated that mobile downtime would have no
   impact on decision-making by their senior managers.

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.

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