Survey:

IDC and OpenOffice.org Survey - November 2006

Executive Summary

This report contains a detailed statistical analysis of the results to the survey titled *IDC and OpenOffice.org Survey - November 2006*. The results analysis includes answers from all respondents who took the survey in the 7 day period from Thursday, November 16, 2006 to Wednesday, November 22, 2006. 5819 completed responses were received to the survey during this time.

This report presents the results of a survey of registered users of OpenOffice.org who have given their permission to be contacted for such purposes. The purpose of the survey is to better understand the usage of OpenOffice.org software and the characteristics of the users of this software.

The survey was conducted by IDC in conjunction with OpenOffice.org. The results of this survey as presented in this report are being made public by IDC and OpenOffice.org for the benefit of the OpenOffice.org community, and to fulfill our commitment to the survey respondents.

Author: Matt Lawton, Program Director, Open Source Software Business Models, IDC
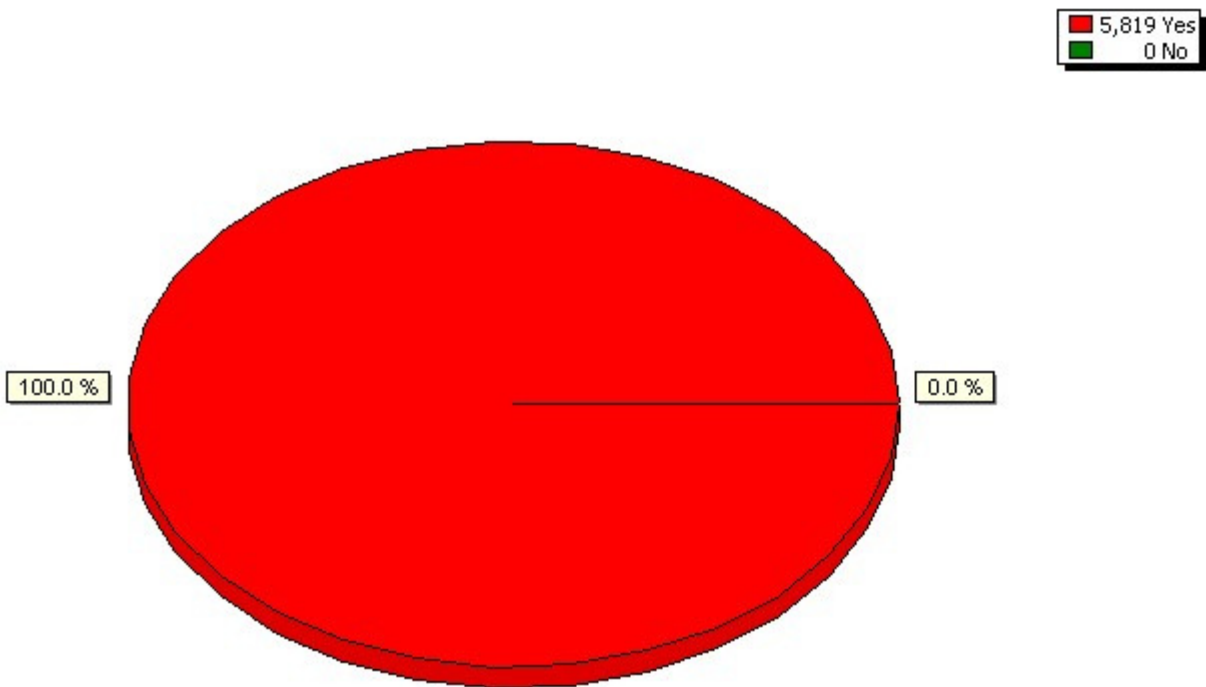**Filter:** (In question "1) Have you used OpenOffice.org in the last year for any purpos..." the respondent selected "Yes")
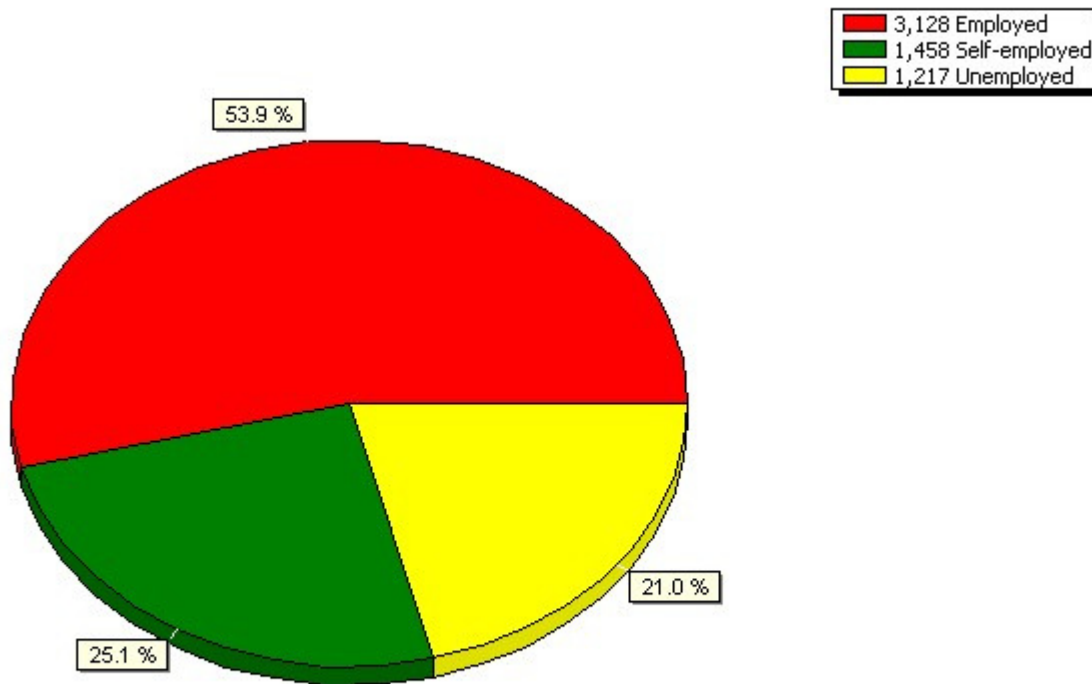**Responses Received:** 5819

Have you used OpenOffice.org in the last year for any purpose, on your own or on behalf of an organization?

Have you used OpenOffice.org in the last year for any purpose, on your own or on behalf of an organization...

■	5,819 Yes
■	0 No

100.0 %   0.0 %

What is your current employment status?

What is your current employment status?

3,128 Employed
1,458 Self-employed
1,217 Unemployed

53.9 %

21.0 %

25.1 %

Analysis Commentary:

Nearly half of the respondents are either self-employed or unemployed. Based on the comments provided at the end of the survey, a number of "unemployed" respondents are retired.

Of the respondents who are employed, less than 5% are from organizations with more than one respondent who has participated in this survey*.

*Subject to the extent IDC could identify respondents from the same organization. Some employed respondents did not provide enough information to uniquely identify their organizations.

Which best describes your organization?

Which best describes your organization?

Legend	
856	User
175	Software vendor
86	Hardware vendor
36	VAR
300	Consultant
12	Software distributor
37	Outsourcer
96	Other IT vendor
1,518	Other non-IT

- Other non-IT: 48.7 %
- Other IT vendor: 3.1 %
- Outsourcer: 1.2 %
- Software distributor: 0.4 %
- Consultant: 9.6 %
- VAR: 1.2 %
- Hardware vendor: 2.8 %
- Software vendor: 5.6 %
- User: 27.5 %
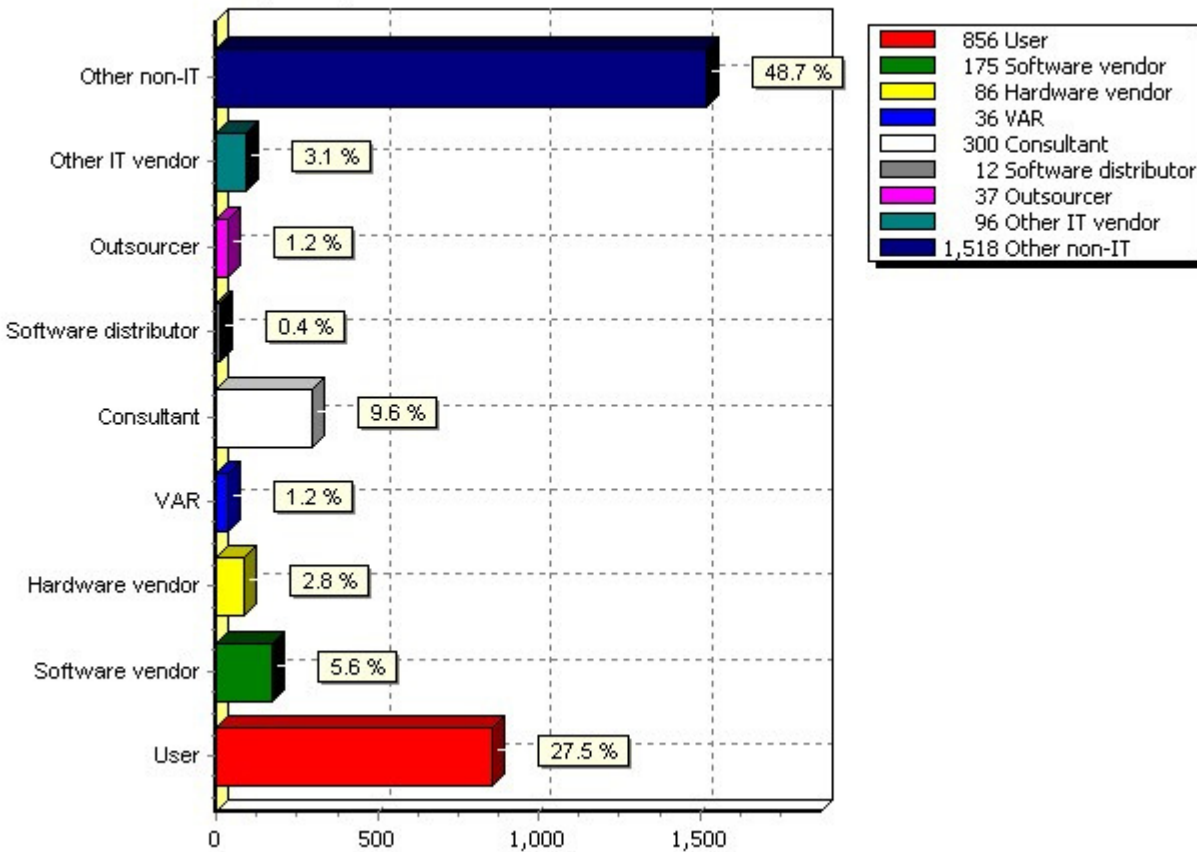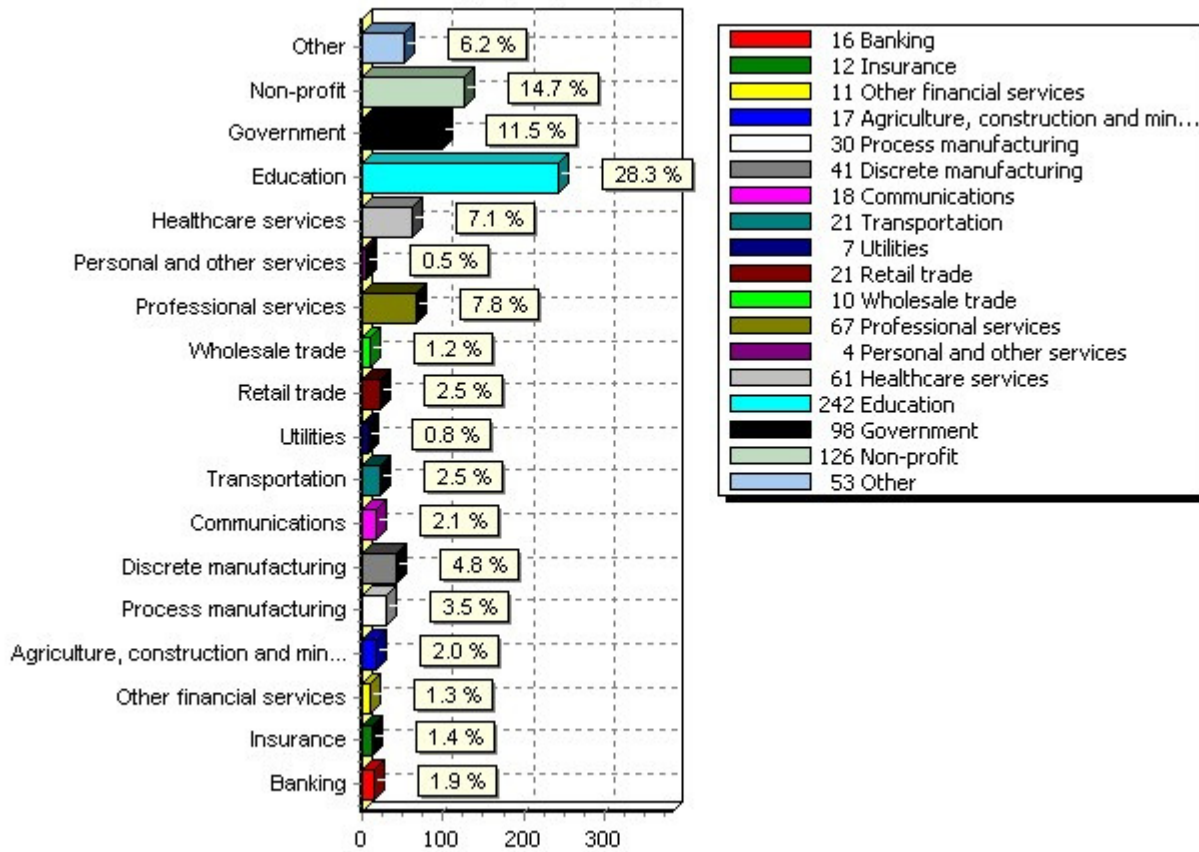
Analysis Commentary:

IDC believes respondents interpreted "Other non-IT" organizations to mean end user organizations that are not in the IT industry. Therefore, the total percentage of end user organizations, both for profit and non-profit, is the sum of "Other non-IT" and "User", or 76.2%, which is reasonable.

The distribution of other types of organizations is also reasonable, with the possible exception of VARs which seems low relative to IDC's research on the composition of the software channel overall.

Note that these types of organizations are categories that respondents elected to choose themselves based on their knowledge of their organization, and their interpretation of the meaning of each category. We know from previous research that this method of categorization of type of organization is somewhat prone to inconsistent results, so please exercise caution when interpreting these results.

What best describes the industrial category for your organization?

What best describes the industrial category for your organization?

Category	Percentage
Other	6.2 %
Non-profit	14.7 %
Government	11.5 %
Education	28.3 %
Healthcare services	7.1 %
Personal and other services	0.5 %
Professional services	7.8 %
Wholesale trade	1.2 %
Retail trade	2.5 %
Utilities	0.8 %
Transportation	2.5 %
Communications	2.1 %
Discrete manufacturing	4.8 %
Process manufacturing	3.5 %
Agriculture, construction and min...	2.0 %
Other financial services	1.3 %
Insurance	1.4 %
Banking	1.9 %

Legend:

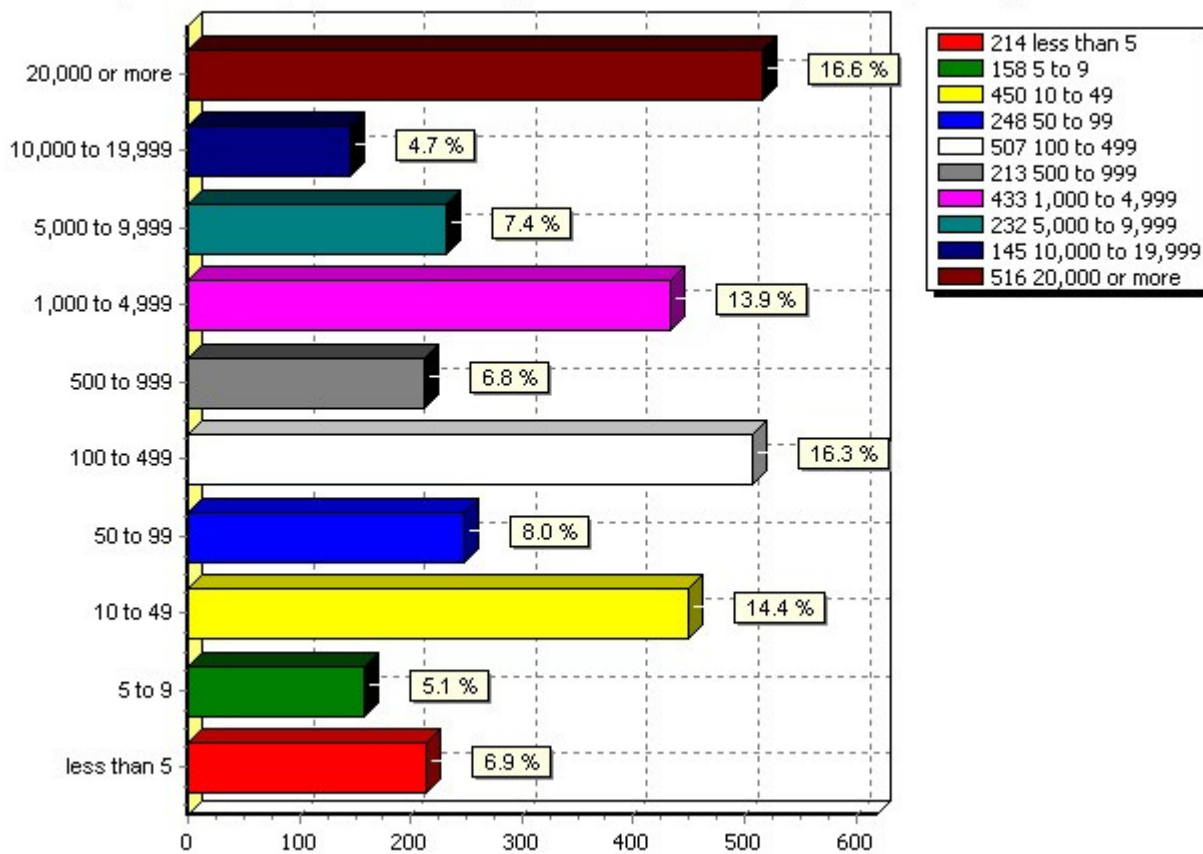| Count	Category
16	Banking
12	Insurance
11	Other financial services
17	Agriculture, construction and min...
30	Process manufacturing
41	Discrete manufacturing
18	Communications
21	Transportation
7	Utilities
21	Retail trade
10	Wholesale trade
67	Professional services
4	Personal and other services
61	Healthcare services
242	Education
98	Government
126	Non-profit
53	Other

Analysis Commentary:

For those who are employed at a "User" organization, over a quarter of the respondents are in the Education industry, with the next highest industries being Non-profit and Government. These industries are typically very cost sensitive and/or interested in deploying standards-compliant technology.

Note: respondents who indicated their organization is "Other non-IT" were not asked this question, hence the total number of respondents to this question is lower than what might be expected.

How many full-time employees are there in your entire worldwide organization, including all divisions and subsidiaries?

How many full-time employees are there in your entire worldwide organization, including all divisions and ...

Legend	
214	less than 5
158	5 to 9
450	10 to 49
248	50 to 99
507	100 to 499
213	500 to 999
433	1,000 to 4,999
232	5,000 to 9,999
145	10,000 to 19,999
516	20,000 or more

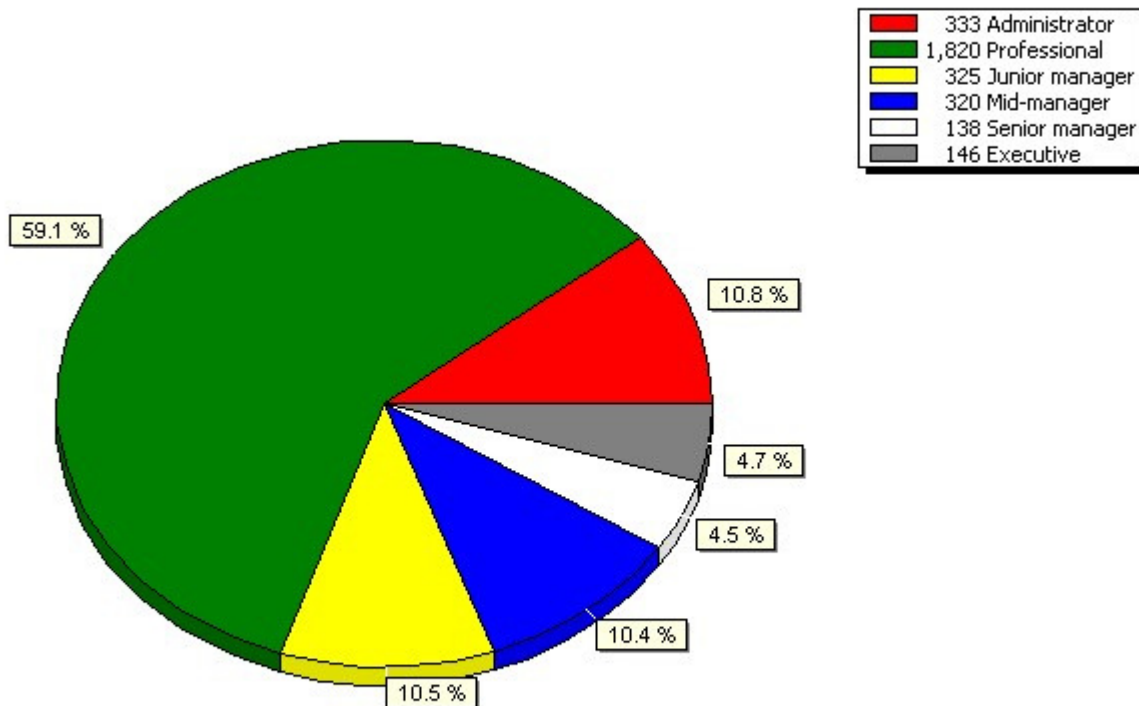| Category	Percentage
20,000 or more	16.6 %
10,000 to 19,999	4.7 %
5,000 to 9,999	7.4 %
1,000 to 4,999	13.9 %
500 to 999	6.8 %
100 to 499	16.3 %
50 to 99	8.0 %
10 to 49	14.4 %
5 to 9	5.1 %
less than 5	6.9 %

Analysis Commentary:

We see a fairly even distribution of employed respondents across all sizes of organizations, with a surprisingly high number of respondents employed at organizations with 20,000 or more employees. Usually we see much fewer large companies than small, so these results likely reflect the high proportion of respondents from governments and education, which tend to be larger organizations. We also know that 60% of the respondents from organizations with more than one respondent in this survey are employed at an organization with 20,000 or more employees, which will slightly skew the results for that category.
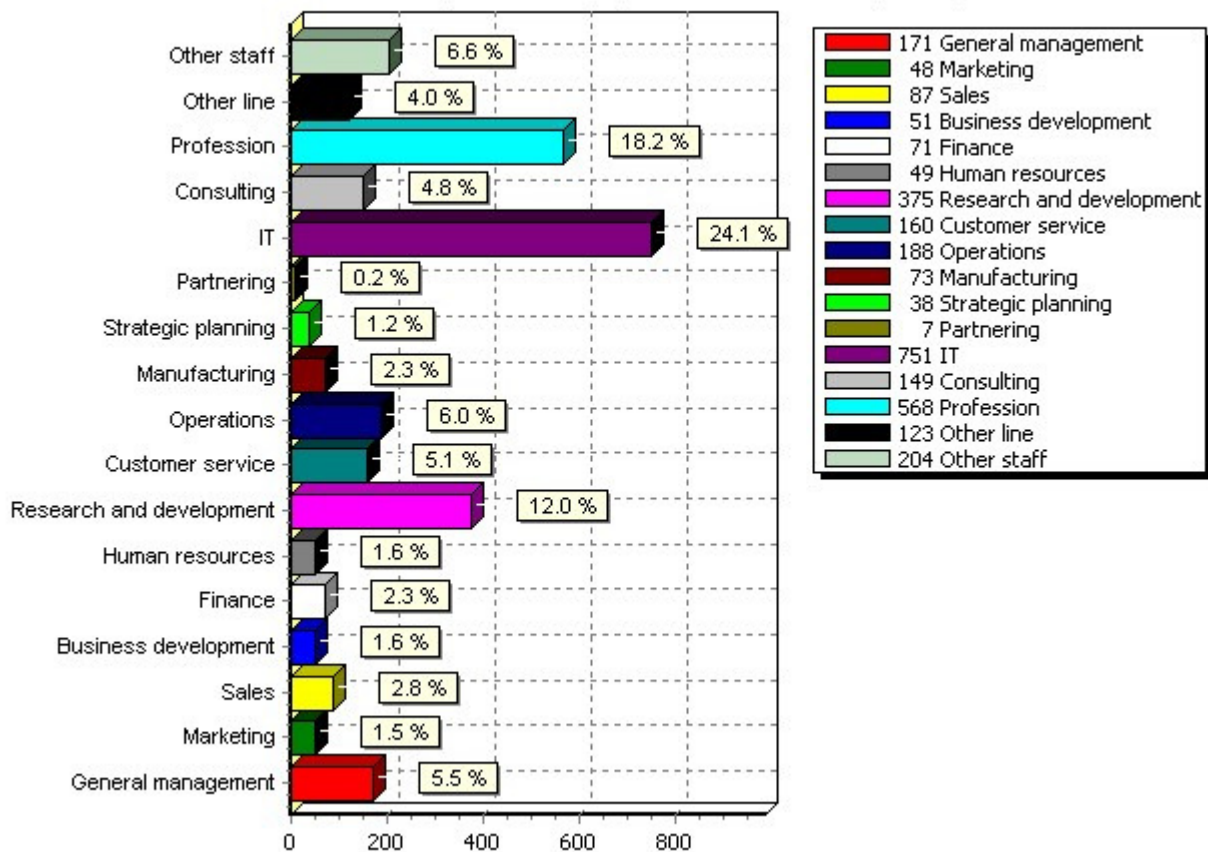
Which one of the following best describes your current position in your organization's hierarchy?

Which one of the following best describes your current position in your organization's hierarchy?

▮ (red)	333 Administrator
▮ (green)	1,820 Professional
▮ (yellow)	325 Junior manager
▮ (blue)	320 Mid-manager
▯ (white)	138 Senior manager
▮ (gray)	146 Executive

59.1 %
10.8 %
4.7 %
4.5 %
10.4 %
10.5 %

What best describes the role in which you currently spend the most time in your organization?

What best describes the role in which you currently spend the most time in your organization?

Role	Value
Other staff	6.6 %
Other line	4.0 %
Profession	18.2 %
Consulting	4.8 %
IT	24.1 %
Partnering	0.2 %
Strategic planning	1.2 %
Manufacturing	2.3 %
Operations	6.0 %
Customer service	5.1 %
Research and development	12.0 %
Human resources	1.6 %
Finance	2.3 %
Business development	1.6 %
Sales	2.8 %
Marketing	1.5 %
General management	5.5 %

Legend:
- 171 General management
- 48 Marketing
- 87 Sales
- 51 Business development
- 71 Finance
- 49 Human resources
- 375 Research and development
- 160 Customer service
- 188 Operations
- 73 Manufacturing
- 38 Strategic planning
- 7 Partnering
- 751 IT
- 149 Consulting
- 568 Profession
- 123 Other line
- 204 Other staff

In which country do you reside?

Response	Count	Percent
Afghanistan	0	0.0%
Albania	2	0.0%
Algeria	0	0.0%
Andorra	0	0.0%
Angola	0	0.0%
Antigua and Barbuda	0	0.0%
Argentina	13	0.2%
Armenia	0	0.0%
Australia	328	5.6%
Austria	29	0.5%
Azerbaijan	0	0.0%
Bahamas	1	0.0%
Bahrain	1	0.0%
Bangladesh	2	0.0%
Barbados	0	0.0%
Belarus	3	0.1%
Belgium	127	2.2%
Belize	0	0.0%
Benin	1	0.0%
Bhutan	0	0.0%
Bolivia	1	0.0%
Bosnia and Herzegovina	1	0.0%
Botswana	0	0.0%
Brazil	75	1.3%
Brunei Darussalam	0	0.0%
Bulgaria	8	0.1%
Burkina Faso	1	0.0%
Burundi	0	0.0%
Cambodia	0	0.0%
Cameroon	0	0.0%
Canada	372	6.4%
Cape Verde	0	0.0%
Central African Republic	0	0.0%
Chad	0	0.0%
Chile	12	0.2%
China	20	0.3%
Colombia	10	0.2%
Comoros	0	0.0%

Congo	0	0.0%
Costa Rica	0	0.0%
Côte d'Ivoire	0	0.0%
Croatia	10	0.2%
Cuba	0	0.0%
Cyprus	3	0.1%
Czech Republic	26	0.4%
Democratic People's Republic of Korea	0	0.0%
Democratic Republic of the Congo	0	0.0%
Denmark	73	1.3%
Djibouti	0	0.0%
Dominica	0	0.0%
Dominican Republic	1	0.0%
Ecuador	4	0.1%
Egypt	4	0.1%
El Salvador	1	0.0%
Equatorial Guinea	0	0.0%
Eritrea	0	0.0%
Estonia	14	0.2%
Ethiopia	0	0.0%
Fiji	0	0.0%
Finland	52	0.9%
France	255	4.4%
Gabon	0	0.0%
Gambia	0	0.0%
Georgia	1	0.0%
Germany	311	5.4%
Ghana	1	0.0%
Greece	19	0.3%
Grenada	0	0.0%
Guatemala	2	0.0%
Guinea	0	0.0%
Guinea-Bissau	0	0.0%
Guyana	0	0.0%
Haiti	0	0.0%
Honduras	0	0.0%
Hungary	31	0.5%
Iceland	1	0.0%
India	64	1.1%
Indonesia	14	0.2%

Iran (Islamic Republic of)	2	0.0%
Iraq	0	0.0%
Ireland	28	0.5%
Israel	21	0.4%
Italy	224	3.9%
Jamaica	0	0.0%
Japan	18	0.3%
Jordan	1	0.0%
Kazakhstan	2	0.0%
Kenya	1	0.0%
Kuwait	2	0.0%
Kyrgyzstan	0	0.0%
Lao People's Democratic Republic	0	0.0%
Latvia	11	0.2%
Lebanon	0	0.0%
Lesotho	0	0.0%
Liberia	0	0.0%
Libyan Arab Jamahiriya	0	0.0%
Liechtenstein	0	0.0%
Lithuania	6	0.1%
Luxembourg	7	0.1%
Madagascar	0	0.0%
Malawi	0	0.0%
Malaysia	17	0.3%
Maldives	0	0.0%
Mali	0	0.0%
Malta	3	0.1%
Marshall Islands	0	0.0%
Mauritania	0	0.0%
Mauritius	3	0.1%
Mexico	29	0.5%
Micronesia (Federated States of)	0	0.0%
Monaco	0	0.0%
Mongolia	0	0.0%
Morocco	2	0.0%
Mozambique	1	0.0%
Myanmar	0	0.0%
Namibia	0	0.0%
Nepal	1	0.0%
Netherlands	223	3.8%

New Zealand	115	2.0%
Nicaragua	1	0.0%
Niger	0	0.0%
Nigeria	0	0.0%
Norway	49	0.8%
Oman	1	0.0%
Pakistan	6	0.1%
Palau	0	0.0%
Panama	3	0.1%
Papua New Guinea	0	0.0%
Paraguay	8	0.1%
Peru	10	0.2%
Philippines	26	0.4%
Poland	42	0.7%
Portugal	69	1.2%
Qatar	2	0.0%
Republic of Korea	8	0.1%
Republic of Moldova	0	0.0%
Romania	35	0.6%
Russian Federation	39	0.7%
Rwanda	0	0.0%
Saint Kitts and Nevis	0	0.0%
Saint Lucia	0	0.0%
Saint Vincent and the Grenadines	0	0.0%
Samoa	0	0.0%
San Marino	0	0.0%
Sao Tome and Principe	0	0.0%
Saudi Arabia	2	0.0%
Senegal	0	0.0%
Seychelles	0	0.0%
Sierra Leone	0	0.0%
Singapore	22	0.4%
Slovakia	12	0.2%
Slovenia	12	0.2%
Solomon Islands	0	0.0%
Somalia	0	0.0%
South Africa	34	0.6%
Spain	120	2.1%
Sri Lanka	4	0.1%
Sudan	0	0.0%

Suriname	0	0.0%
Swaziland	1	0.0%
Sweden	83	1.4%
Switzerland	70	1.2%
Syrian Arab Republic	0	0.0%
Taiwan	10	0.2%
Tajikistan	1	0.0%
Thailand	12	0.2%
Togo	0	0.0%
Trinidad and Tobago	4	0.1%
Tunisia	0	0.0%
Turkey	21	0.4%
Turkmenistan	0	0.0%
Uganda	0	0.0%
Ukraine	12	0.2%
United Arab Emirates	2	0.0%
United Kingdom of Great Britain and Northern Ireland	537	9.2%
United Republic of Tanzania	2	0.0%
United States of America	1905	32.8%
Uruguay	6	0.1%
Uzbekistan	0	0.0%
Vanuatu	0	0.0%
Venezuela	13	0.2%
Viet Nam	0	0.0%
Yemen	1	0.0%
Yugoslavia	9	0.2%
Zambia	2	0.0%
Zimbabwe	4	0.1%

Analysis Commentary:

The top five countries represented in this survey are:
USA - 32.8% of respondents
UK - 9.2%
Canada - 6.4%
Australia - 5.6%
Germany - 5.4%

Note: this survey was conducted in English only, which will bias the distribution of survey respondents to countries that are English-speaking or have a sizeable population of English-speaking residents.

In which country is your organization's headquarters (i.e. head office) located?

Response	Count	Percent
Afghanistan	0	0.0%
Albania	1	0.0%
Algeria	0	0.0%
Andorra	0	0.0%
Angola	0	0.0%
Antigua and Barbuda	0	0.0%
Argentina	6	0.2%
Armenia	0	0.0%
Australia	138	4.4%
Austria	18	0.6%
Azerbaijan	1	0.0%
Bahamas	1	0.0%
Bahrain	0	0.0%
Bangladesh	0	0.0%
Barbados	0	0.0%
Belarus	3	0.1%
Belgium	64	2.1%
Belize	0	0.0%
Benin	0	0.0%
Bhutan	0	0.0%
Bolivia	1	0.0%
Bosnia and Herzegovina	0	0.0%
Botswana	0	0.0%
Brazil	41	1.3%
Brunei Darussalam	1	0.0%
Bulgaria	2	0.1%
Burkina Faso	1	0.0%
Burundi	0	0.0%
Cambodia	0	0.0%
Cameroon	0	0.0%
Canada	164	5.3%
Cape Verde	0	0.0%
Central African Republic	0	0.0%
Chad	0	0.0%
Chile	7	0.2%
China	10	0.3%
Colombia	6	0.2%
Comoros	0	0.0%

Congo	0	0.0%
Costa Rica	0	0.0%
Côte d'Ivoire	0	0.0%
Croatia	4	0.1%
Cuba	0	0.0%
Cyprus	0	0.0%
Czech Republic	13	0.4%
Democratic People's Republic of Korea	0	0.0%
Democratic Republic of the Congo	0	0.0%
Denmark	47	1.5%
Djibouti	0	0.0%
Dominica	0	0.0%
Dominican Republic	0	0.0%
Ecuador	0	0.0%
Egypt	2	0.1%
El Salvador	0	0.0%
Equatorial Guinea	0	0.0%
Eritrea	0	0.0%
Estonia	9	0.3%
Ethiopia	0	0.0%
Fiji	0	0.0%
Finland	28	0.9%
France	159	5.1%
Gabon	0	0.0%
Gambia	0	0.0%
Georgia	1	0.0%
Germany	179	5.8%
Ghana	1	0.0%
Greece	7	0.2%
Grenada	0	0.0%
Guatemala	2	0.1%
Guinea	0	0.0%
Guinea-Bissau	0	0.0%
Guyana	0	0.0%
Haiti	0	0.0%
Honduras	0	0.0%
Hungary	16	0.5%
Iceland	1	0.0%
India	30	1.0%
Indonesia	8	0.3%

Iran (Islamic Republic of)	0	0.0%
Iraq	0	0.0%
Ireland	12	0.4%
Israel	9	0.3%
Italy	119	3.8%
Jamaica	1	0.0%
Japan	24	0.8%
Jordan	0	0.0%
Kazakhstan	2	0.1%
Kenya	0	0.0%
Kuwait	2	0.1%
Kyrgyzstan	0	0.0%
Lao People's Democratic Republic	0	0.0%
Latvia	7	0.2%
Lebanon	0	0.0%
Lesotho	0	0.0%
Liberia	0	0.0%
Libyan Arab Jamahiriya	0	0.0%
Liechtenstein	0	0.0%
Lithuania	6	0.2%
Luxembourg	9	0.3%
Madagascar	0	0.0%
Malawi	0	0.0%
Malaysia	7	0.2%
Maldives	0	0.0%
Mali	0	0.0%
Malta	2	0.1%
Marshall Islands	0	0.0%
Mauritania	0	0.0%
Mauritius	3	0.1%
Mexico	11	0.4%
Micronesia (Federated States of)	0	0.0%
Monaco	0	0.0%
Mongolia	0	0.0%
Morocco	0	0.0%
Mozambique	1	0.0%
Myanmar	0	0.0%
Namibia	0	0.0%
Nepal	0	0.0%
Netherlands	102	3.3%

New Zealand	48	1.5%
Nicaragua	0	0.0%
Niger	0	0.0%
Nigeria	0	0.0%
Norway	34	1.1%
Oman	0	0.0%
Pakistan	4	0.1%
Palau	0	0.0%
Panama	1	0.0%
Papua New Guinea	0	0.0%
Paraguay	4	0.1%
Peru	3	0.1%
Philippines	12	0.4%
Poland	19	0.6%
Portugal	42	1.4%
Qatar	0	0.0%
Republic of Korea	4	0.1%
Republic of Moldova	0	0.0%
Romania	17	0.5%
Russian Federation	26	0.8%
Rwanda	0	0.0%
Saint Kitts and Nevis	0	0.0%
Saint Lucia	0	0.0%
Saint Vincent and the Grenadines	0	0.0%
Samoa	0	0.0%
San Marino	0	0.0%
Sao Tome and Principe	0	0.0%
Saudi Arabia	2	0.1%
Senegal	0	0.0%
Seychelles	0	0.0%
Sierra Leone	0	0.0%
Singapore	11	0.4%
Slovakia	6	0.2%
Slovenia	7	0.2%
Solomon Islands	0	0.0%
Somalia	0	0.0%
South Africa	21	0.7%
Spain	58	1.9%
Sri Lanka	2	0.1%
Sudan	0	0.0%

Suriname	0	0.0%
Swaziland	0	0.0%
Sweden	50	1.6%
Switzerland	48	1.5%
Syrian Arab Republic	0	0.0%
Taiwan	9	0.3%
Tajikistan	0	0.0%
Thailand	4	0.1%
Togo	0	0.0%
Trinidad and Tobago	4	0.1%
Tunisia	0	0.0%
Turkey	11	0.4%
Turkmenistan	0	0.0%
Uganda	0	0.0%
Ukraine	9	0.3%
United Arab Emirates	3	0.1%
United Kingdom of Great Britain and Northern Ireland	257	8.3%
United Republic of Tanzania	0	0.0%
United States of America	1085	34.9%
Uruguay	5	0.2%
Uzbekistan	0	0.0%
Vanuatu	0	0.0%
Venezuela	6	0.2%
Viet Nam	0	0.0%
Yemen	1	0.0%
Yugoslavia	5	0.2%
Zambia	1	0.0%
Zimbabwe	3	0.1%

Analysis Commentary:

The top five organization headquarter countries are:
USA - 34.9%
UK - 8.3%
Germany - 5.8%
Canada - 5.3%
France - 5.1%

Note: this survey was conducted in English only, which will bias the distribution of survey respondents to countries that are English-speaking or have a sizeable population of English-speaking residents.

How did you obtain your most recent copy of OpenOffice.org?

How did you obtain your most recent copy of OpenOffice.org?

	Count
Website	4,371
Peer-to-peer	165
Mirror site	553
CD-friend	12
CD-magazine	69
CD-bought	34
CD-give away	23
CD-organization	6
Commercial version	13
Pre-installed	18
Installed by organization	31
Bundled with OS	361
Don't know	6
Other	139

Category	Percentage
Other	2.4 %
Don't know	0.1 %
Bundled with OS	6.2 %
Installed by organization	0.5 %
Pre-installed	0.3 %
Commercial version	0.2 %
CD-organization	0.1 %
CD-give away	0.4 %
CD-bought	0.6 %
CD-magazine	1.2 %
CD-friend	0.2 %
Mirror site	9.5 %
Peer-to-peer	2.8 %
Website	75.3 %

Analysis Commentary:

Given the source of respondents to this survey*, it is not surprising to see that the vast majority got their copy of OpenOffice.org from either the website or a mirror site.

*Respondents were sourced from registered users of OpenOffice.org who gave permission to OpenOffice.org to contact them. All users who download OpenOffice.org are prompted to register with OpenOffice.org, but users who receive OpenOffice.org bundled with Linux distributions may or may not be prompted to register with OpenOffice.org.

On how many computers (PCs, workstations, laptops, etc.) was your most recent copy of OpenOffice.org installed?

On how many computers (PCs, workstations, laptops, etc.) was your most recent copy of OpenOffice.org insta.

23	Zero
2,397	One
1,467	Two
1,097	3 to 4
382	5 to 9
256	10 to 49
66	50 to 99
73	100 to 999
20	1000 or more
35	Don't know

Category	Percentage
Don't know	0.6 %
1000 or more	0.3 %
100 to 999	1.3 %
50 to 99	1.1 %
10 to 49	4.4 %
5 to 9	6.6 %
3 to 4	18.9 %
Two	25.2 %
One	41.2 %
Zero	0.4 %

What is the operating environment which you personally used most in the last year for OpenOffice.org?

What is the operating environment which you personally used most in the last year for OpenOffice.org?

Legend:
- Mac OS X
- FreeBSD
- Linux
- Solaris SPARC
- Solaris x86
- Windows
- Other
- Not applicable

At work:
- 2.8 %
- 0.3 %
- 12.9 %
- 0.4 %
- 0.2 %
- 62.1 %
- 0.2 %
- 21.2 %

At home:
- 5.6 %
- 0.3 %
- 20.1 %
- 0.0 %
- 0.0 %
- 72.7 %
- 0.2 %
- 0.9 %
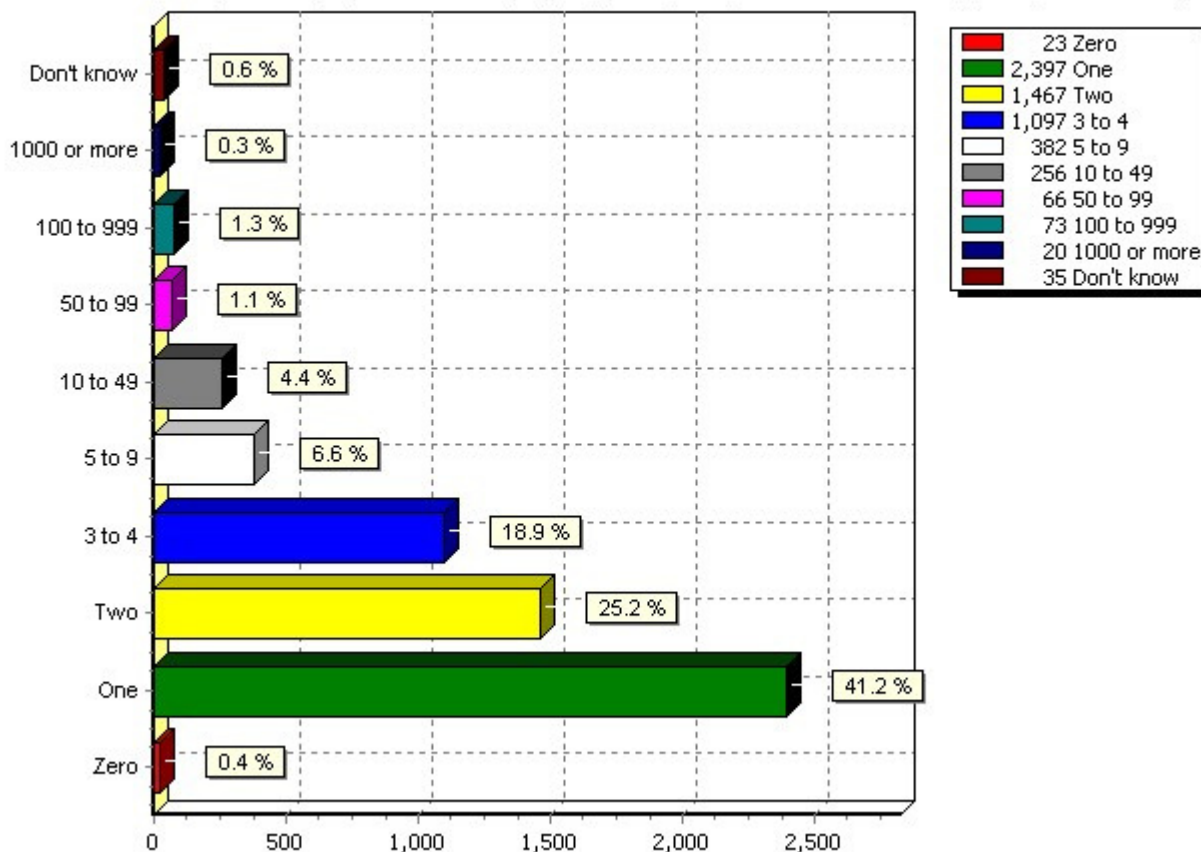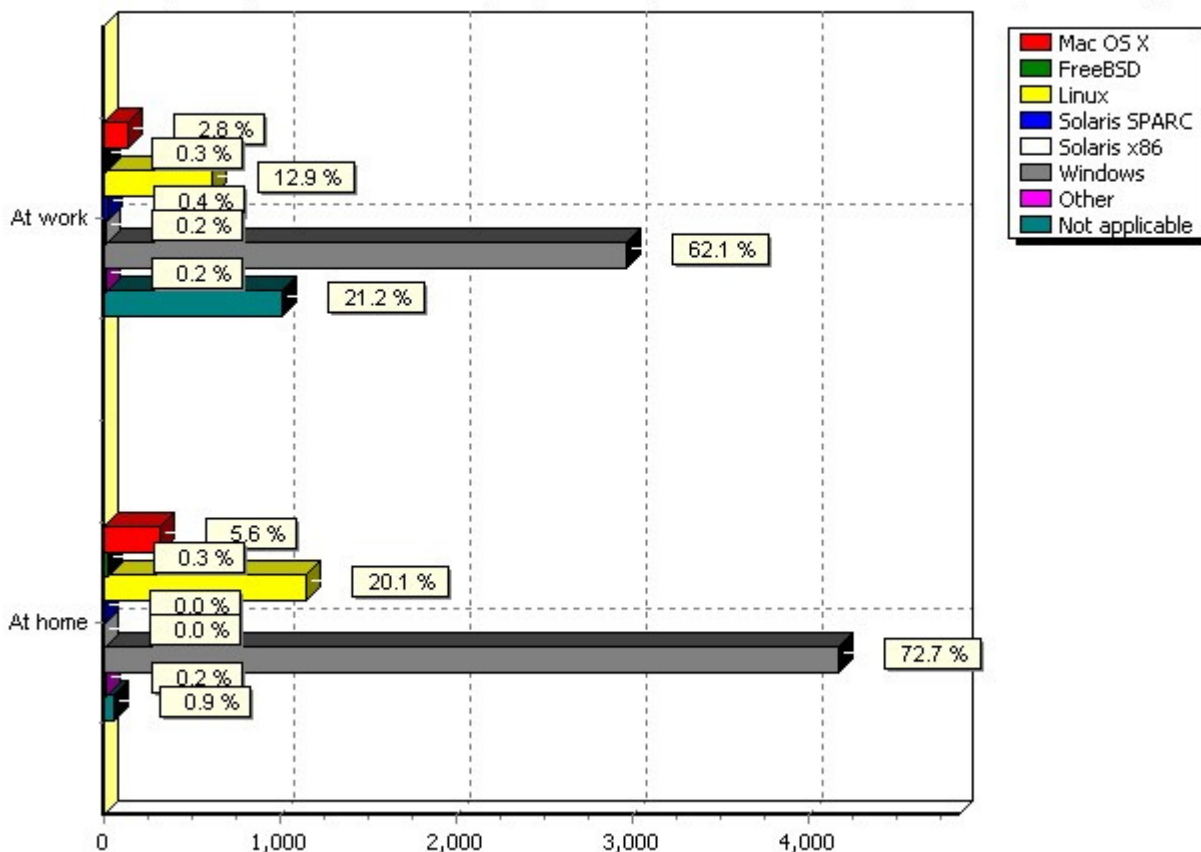
Analysis Commentary:

Windows is clearly the most prevalent operating system for both work and home usage of OpenOffice.org, reflecting the large installed base of Windows. Linux is a strong second, more so at home than at work.

What is the operating environment which your organization used most in the last year for OpenOffice.org?

What is the operating environment which your organization used most in the last year for OpenOffice.org?

42	Mac OS
8	FreeBSD
259	Linux
17	Solaris SPARC
3	Solaris x86
1,914	Windows
6	Other
738	None
133	Don't know

Don't know — 4.3 %
None — 23.7 %
Other — 0.2 %
Windows — 61.3 %
Solaris x86 — 0.1 %
Solaris SPARC — 0.5 %
Linux — 8.3 %
FreeBSD — 0.3 %
Mac OS — 1.3 %
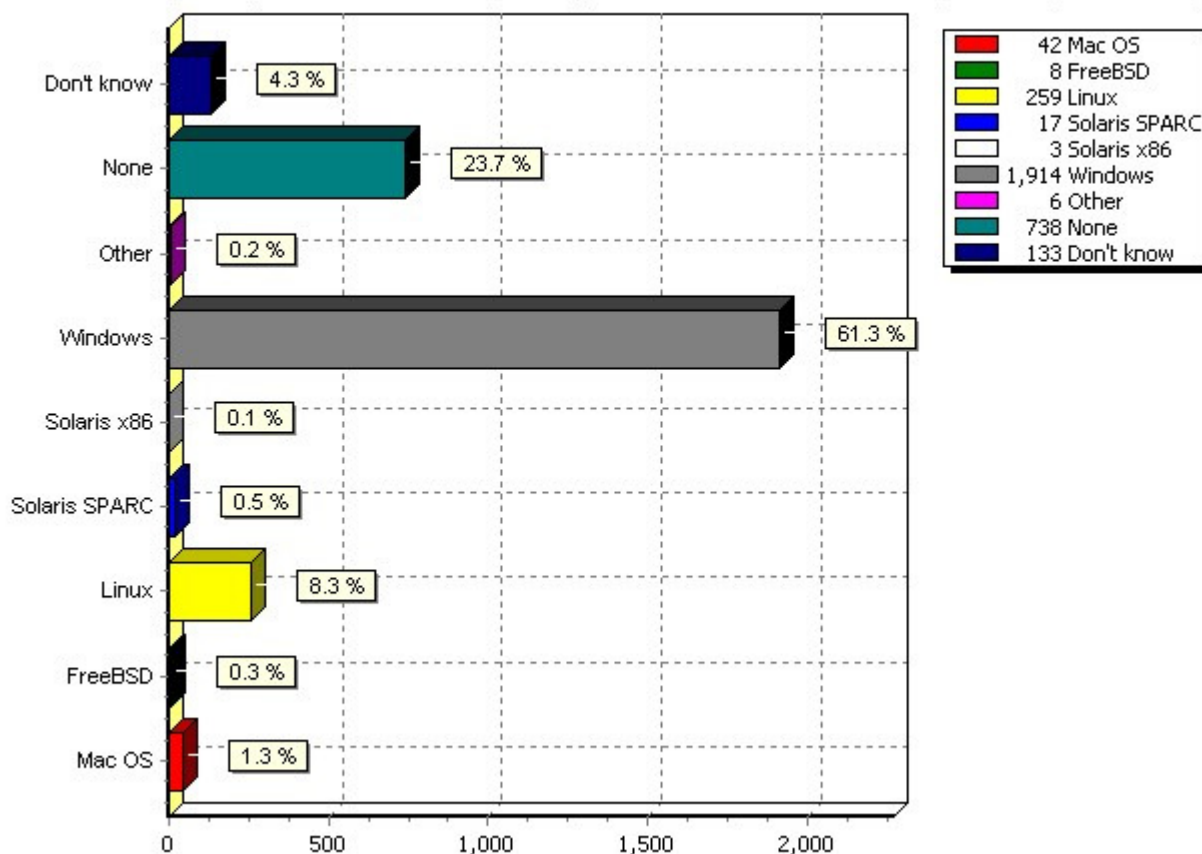
Analysis Commentary:

Almost a quarter of the respondents working at an organization responded that their organization did not use any operating system for OpenOffice.org, meaning they are using OpenOffice.org, but their organization is not. For those interested in increasing the penetration of OpenOffice.org, these people are an important target to help their organizations start using OpenOffice.org (i.e. there is an advocate in an organization that has not yet decided to use OpenOffice.org).

How many units of OpenOffice.org have been installed on computers worldwide in your organization to date?

How many units of OpenOffice.org have been installed on computers worldwide in your organization to date?

Category	Value
288	One
401	2 to 4
280	5 to 9
185	10 to 19
153	20 to 49
106	50 to 99
67	100 to 199
53	200 to 499
31	500 to 999
18	1000 to 1999
12	2000 to 4999
10	5000 to 9999
15	10000 or more
1,471	Don't know

Bar chart values:
- Don't know: 47.6 %
- 10000 or more: 0.5 %
- 5000 to 9999: 0.3 %
- 2000 to 4999: 0.4 %
- 1000 to 1999: 0.6 %
- 500 to 999: 1.0 %
- 200 to 499: 1.7 %
- 100 to 199: 2.2 %
- 50 to 99: 3.4 %
- 20 to 49: 5.0 %
- 10 to 19: 6.0 %
- 5 to 9: 9.1 %
- 2 to 4: 13.0 %
- One: 9.3 %
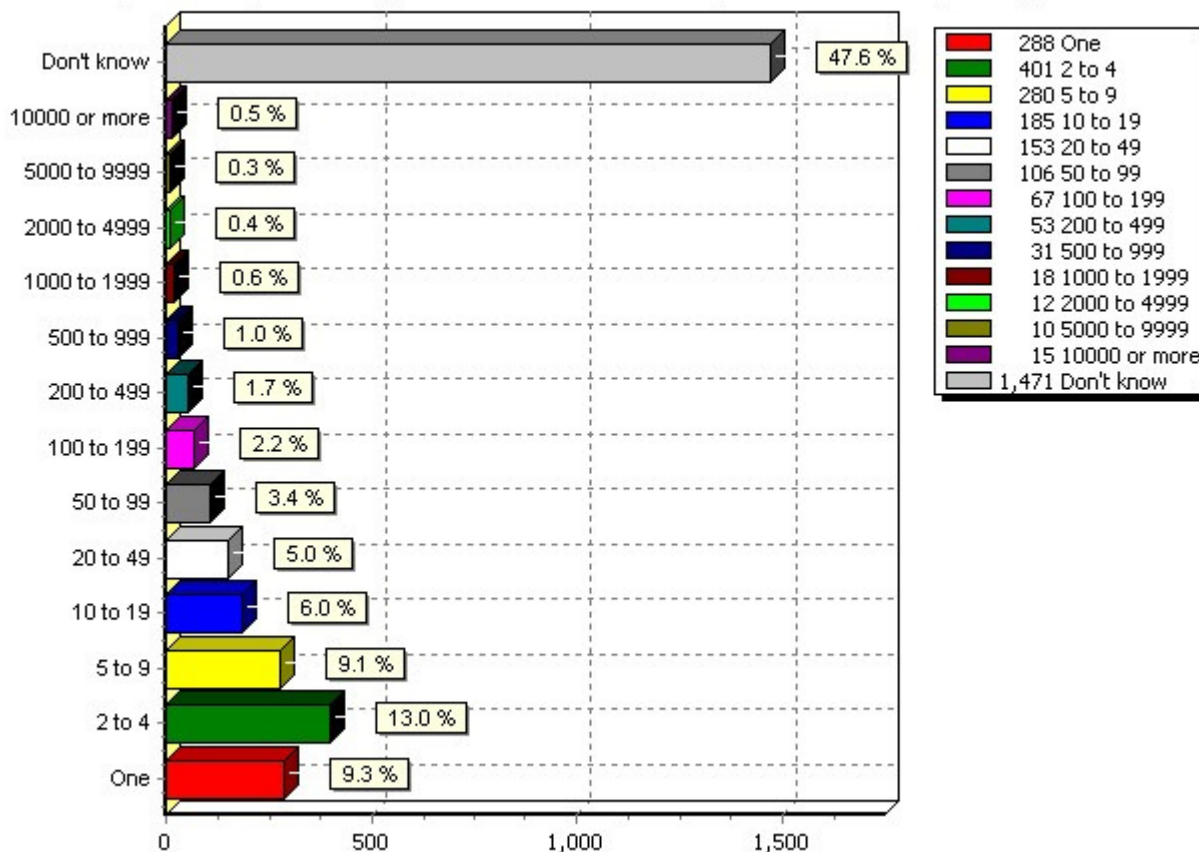
Analysis Commentary:

While almost half the respondents at an organization did not know the penetration of OpenOffice.org (or the organization simply did not have OpenOffice.org installed on any machines), of those who did know the penetration, we see almost a 5 to 1 ratio of organizations with more than one unit installed versus just one unit installed.

What is the current status of your personal adoption of OpenOffice.org?

What is the current status of your personal adoption of OpenOffice.org?
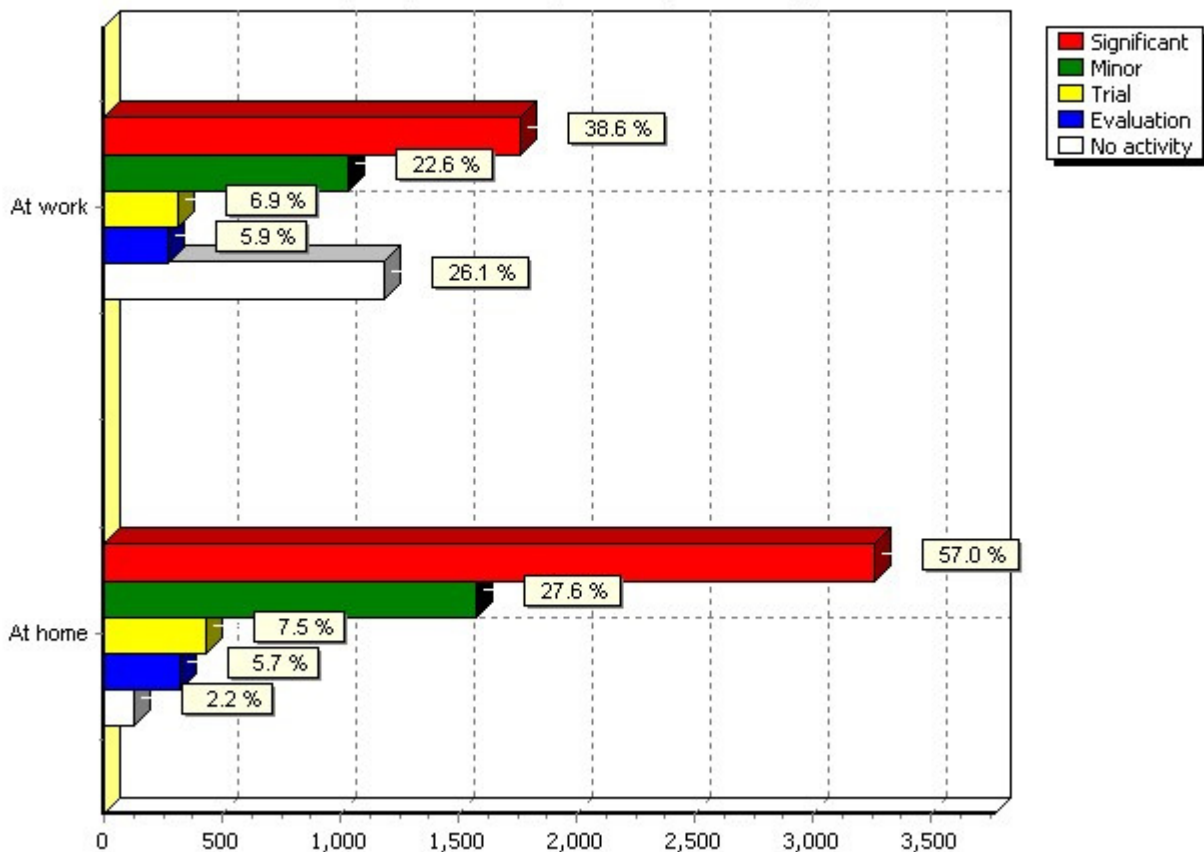
Analysis Commentary:

Clearly personal adoption of OpenOffice.org is extremely high - 57% of respondents are using OpenOffice.org in a significant way at home, while 38.6% are using it significantly at work. However, again we see about a quarter of respondents not using OpenOffice.org at all at work.

At your organization, what is the current adoption of OpenOffice.org?

At your organization, what is the current adoption of OpenOffice.org?

Color	Legend
457 Significant
620 Minor
213 Trial
257 Evaluation
984 No activity
587 Don't know

Don't know — 18.8 %
No activity — 31.6 %
Evaluation — 8.2 %
Trial — 6.8 %
Minor — 19.9 %
Significant — 14.7 %
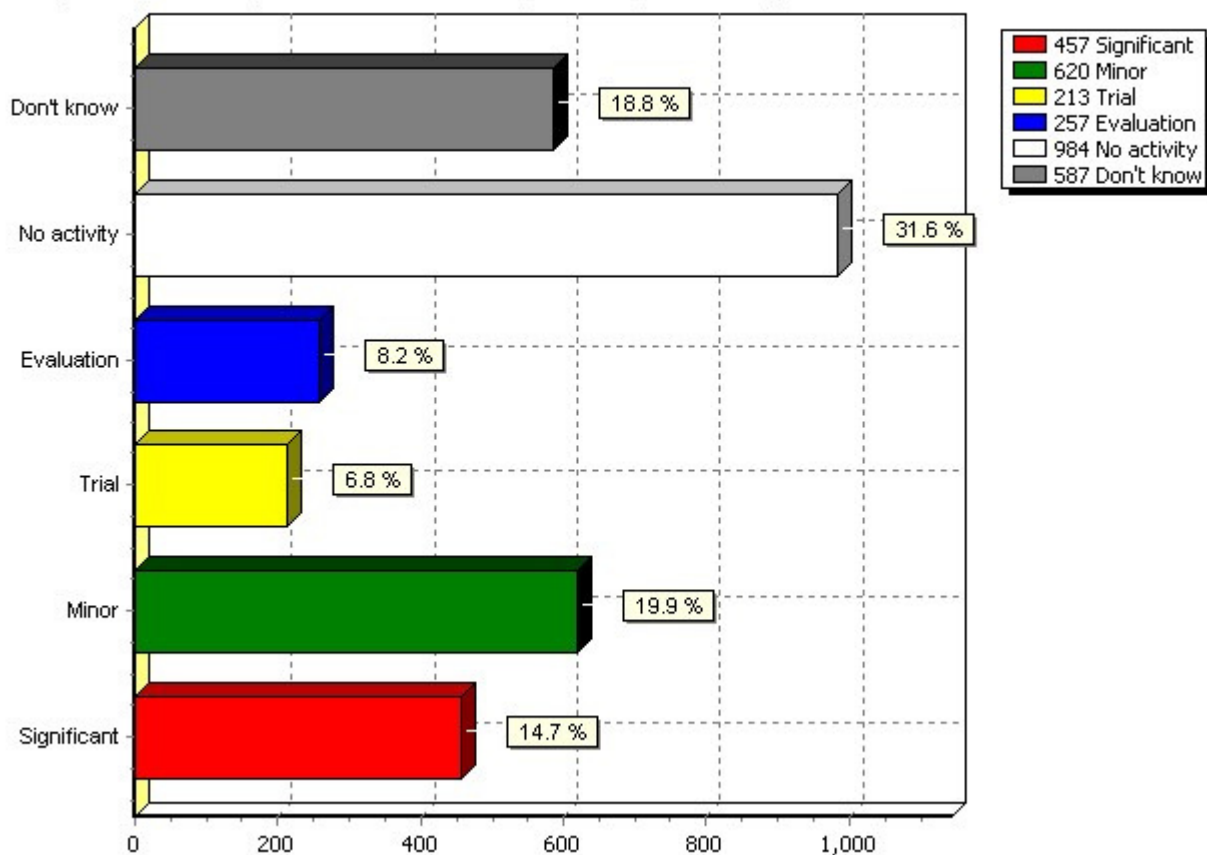
Analysis Commentary:

Here we see that of those respondents employed at an organization, the highest percentage of any category of OpenOffice.org adoption is for those organizations who are not using OpenOffice.org (31.6%). As noted earlier, there is work to be done to increase the adoption of OpenOffice.org by organizations. Less than 15% of organizations are using OpenOffice.org in a significant way, and these are organizations of respondents who are for the most part personally using OpenOffice.org in a big way. We would expect the adoption of the general population of organizations to be even lower than what is indicated here.

What are your personal plans for your usage of OpenOffice.org in the next 12 months relative to your current usage?

What are your personal plans for your usage of OpenOffice.org in the next 12 months relative to your curre...

Legend: Starting, Increasing, Maintaining, Decreasing, Stopping

At work:
- Starting: 8.7 %
- Increasing: 41.6 %
- Maintaining: 43.1 %
- Decreasing: 1.8 %
- Stopping: 4.7 %

At home:
- Starting: 2.4 %
- Increasing: 47.1 %
- Maintaining: 48.5 %
- Decreasing: 1.3 %
- Stopping: 0.6 %
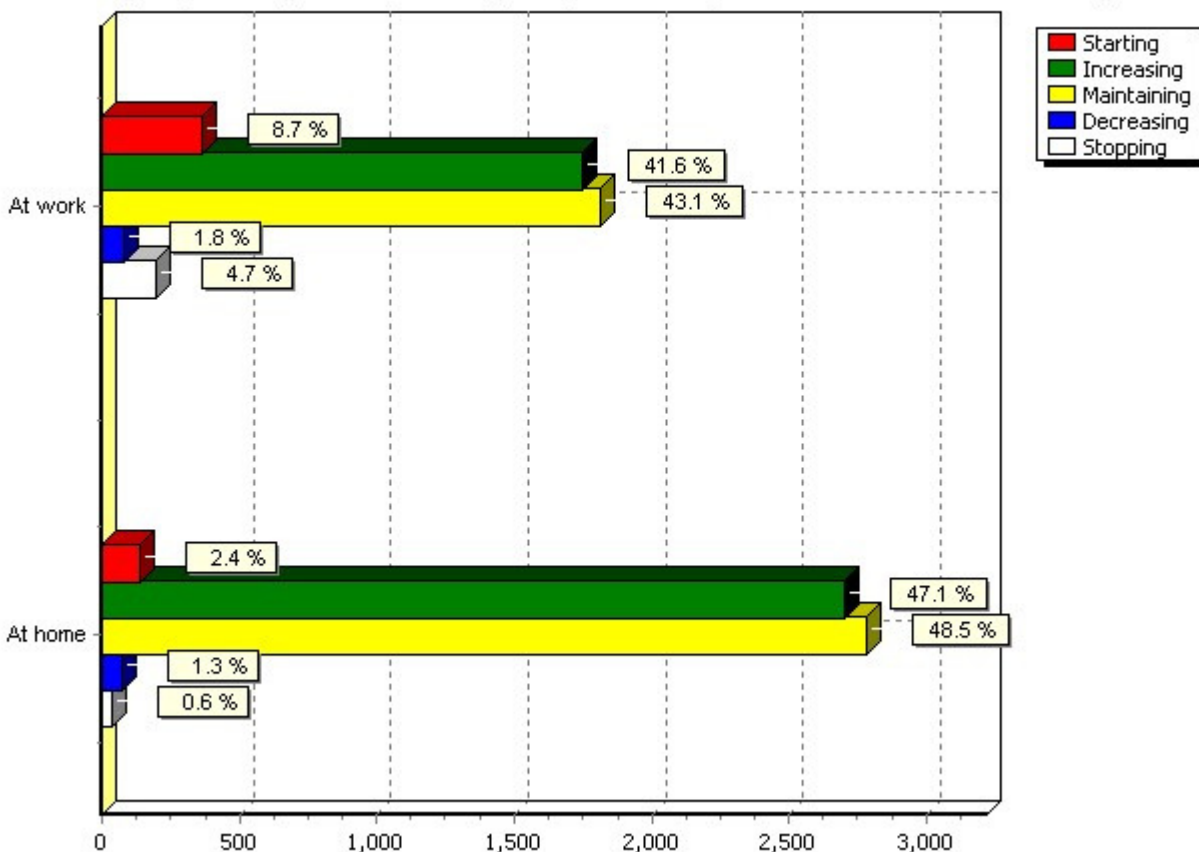
Analysis Commentary:

The good news here is that most respondents are either planning to maintain or to increase their usage of OpenOffice.org.

At your organization, what are the plans for usage of OpenOffice.org in the next 12 months relative to the current usage?

At your organization, what are the plans for usage of OpenOffice.org in the next 12 months relative to the...

Legend	
125	Starting
745	Increasing
582	Maintaining
28	Decreasing
50	Stopping
1,581	Don't know

- Don't know: 50.8 %
- Stopping: 1.6 %
- Decreasing: 0.9 %
- Maintaining: 18.7 %
- Increasing: 23.9 %
- Starting: 4.0 %
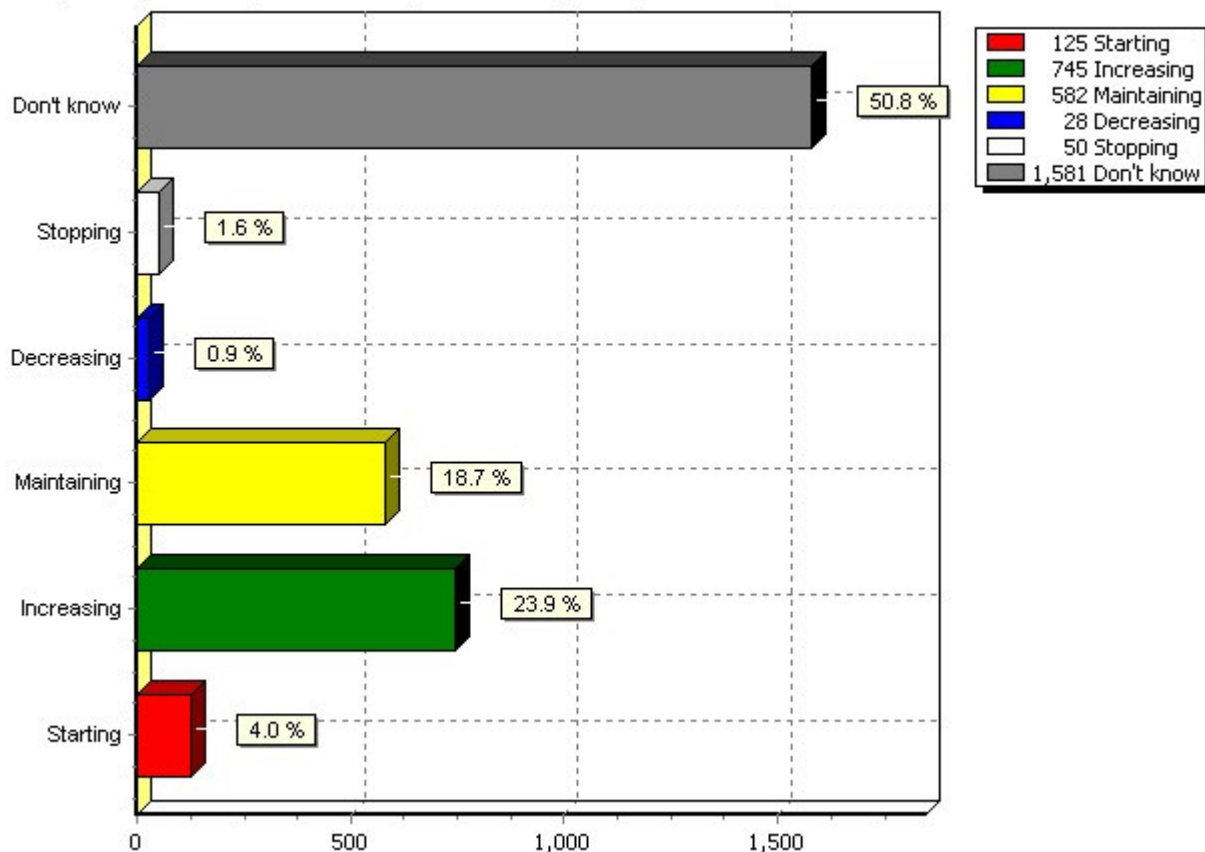
Analysis Commentary:

Likewise at organizations. Of those who know, respondents indicated that organizations are planning to increase or maintain their usage of OpenOffice.org. Less than 3% plan to decrease or stop using OpenOffice.org.

What is the main motivation for your usage of OpenOffice.org in the last year?

What is the main motivation for your usage of OpenOffice.org in the last year?

■	124 Generate revenue
■	2,442 Reduce cost
■	3,232 Non-economic

42.1 %

2.1 %

55.7 %
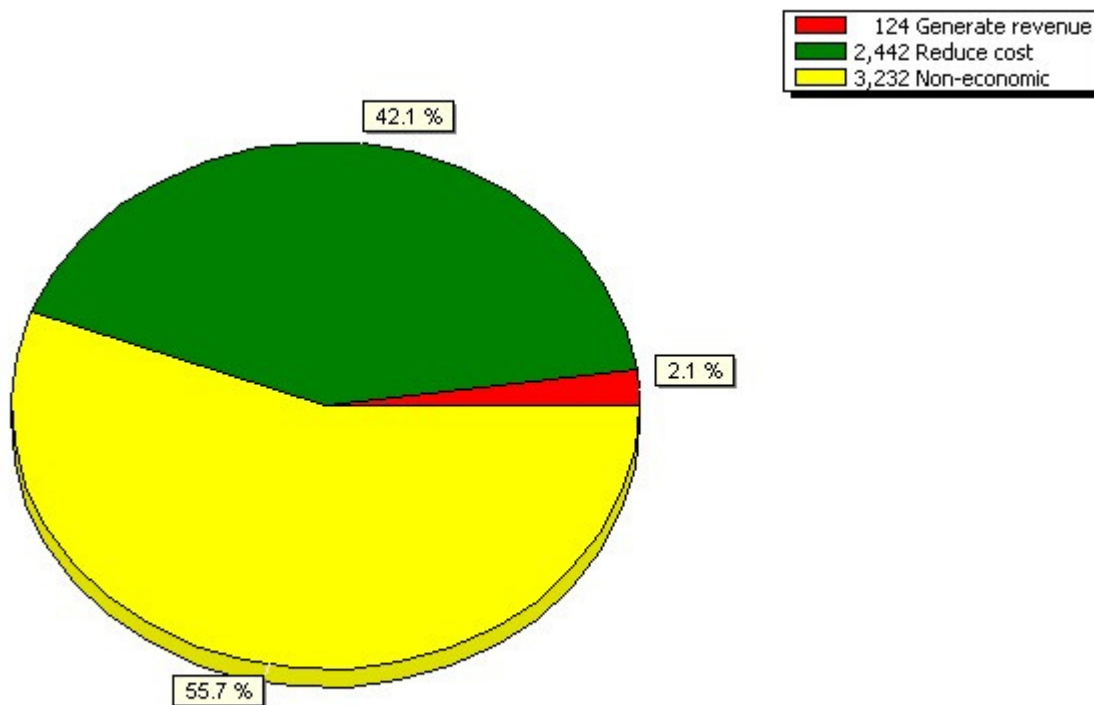
Analysis Commentary:

Not surprisingly, only a very small proportion of respondents are interested in the commercial aspects of OpenOffice.org. However, surprising to IDC is the fact that more respondents are motivated by non-economic reasons for using OpenOffice.org (such as community benefit or standards compliance) than by the opportunity to reduce their operating costs. This result may be influenced by the high proportion of respondents from Government and Education.
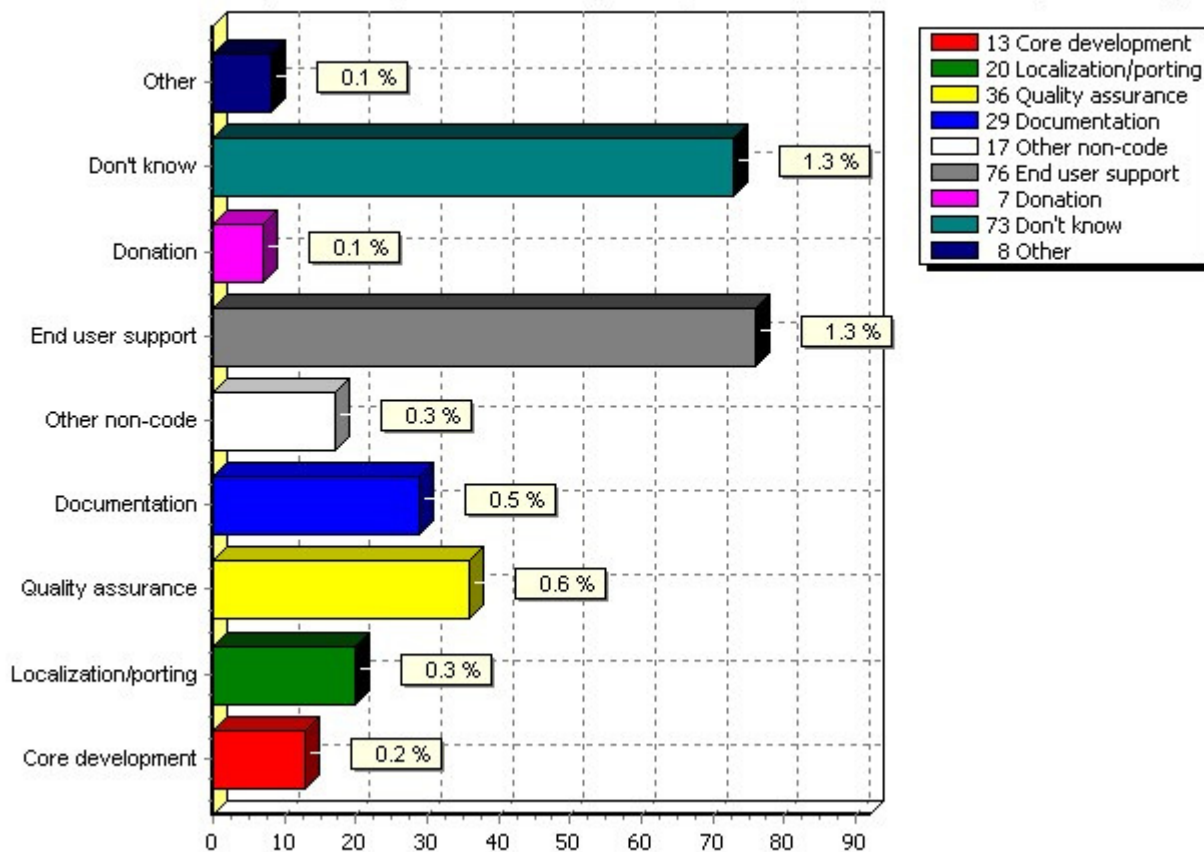
Have you registered as a community member at the OpenOffice.org website, and actively participated in the community in the last 12 months in some way?

Have you registered as a community member at the OpenOffice.org website, and actively participated in the .

1,737 Yes
4,071 No

29.9 %

70.1 %
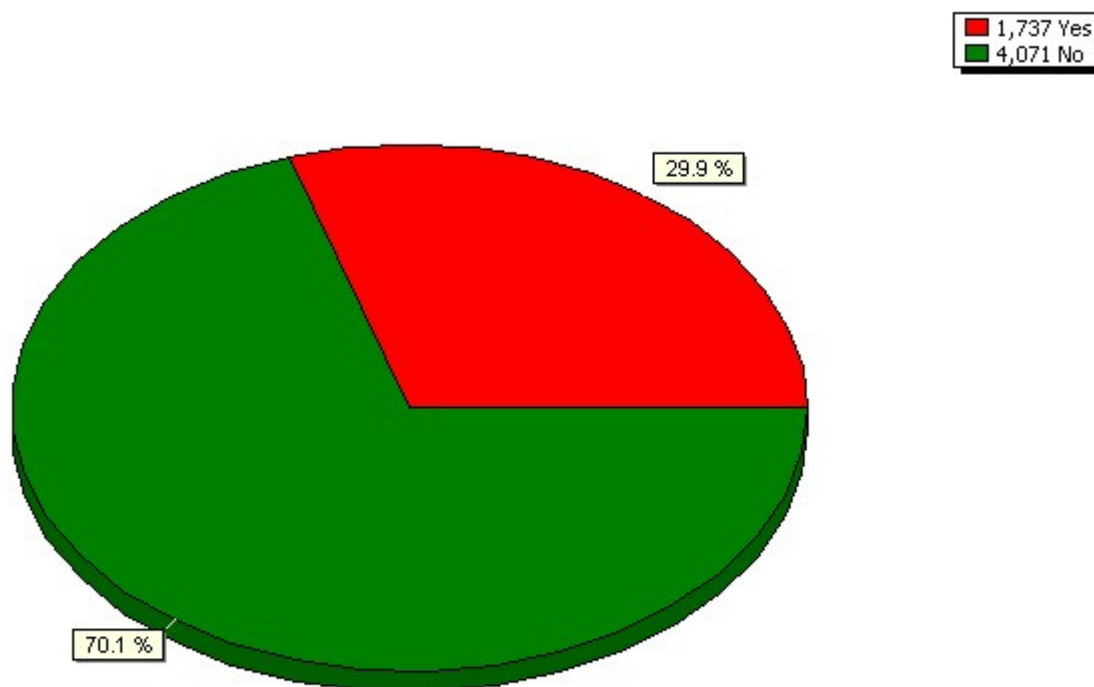
Analysis Commentary:

70% of respondents have not registered as a community member, but the flip side to this is that an impressive 30% *have* registered. This represents a significant workforce available to OpenOffice.org to help in various ways, as we'll see in the next few charts.

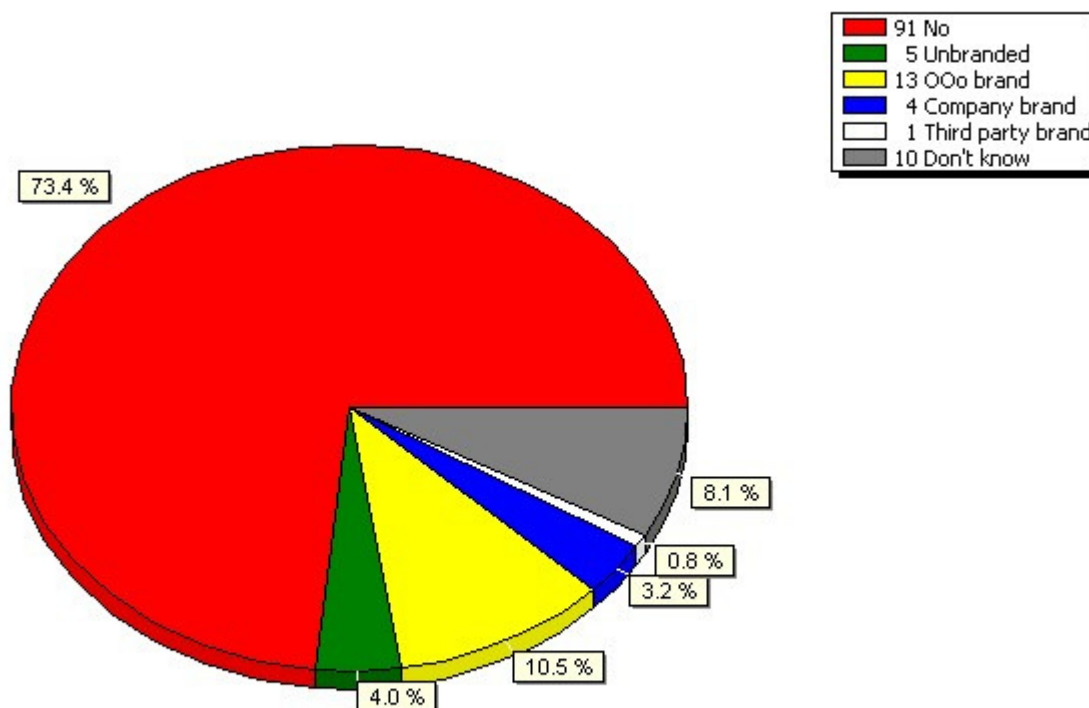**In the last 12 months, in what ways have you participated in the OpenOffice.org community? (select all that apply)**

In the last 12 months, in what ways have you participated in the OpenOffice.org community? (select all tha...

20	Core development
26	Localization/porting
342	Quality assurance
92	Documentation
105	Other non-code
630	End user support
130	Donation
467	Other

- Other: 8.0 %
- Donation: 2.2 %
- End user support: 10.8 %
- Other non-code: 1.8 %
- Documentation: 1.6 %
- Quality assurance: 5.9 %
- Localization/porting: 0.4 %
- Core development: 0.3 %
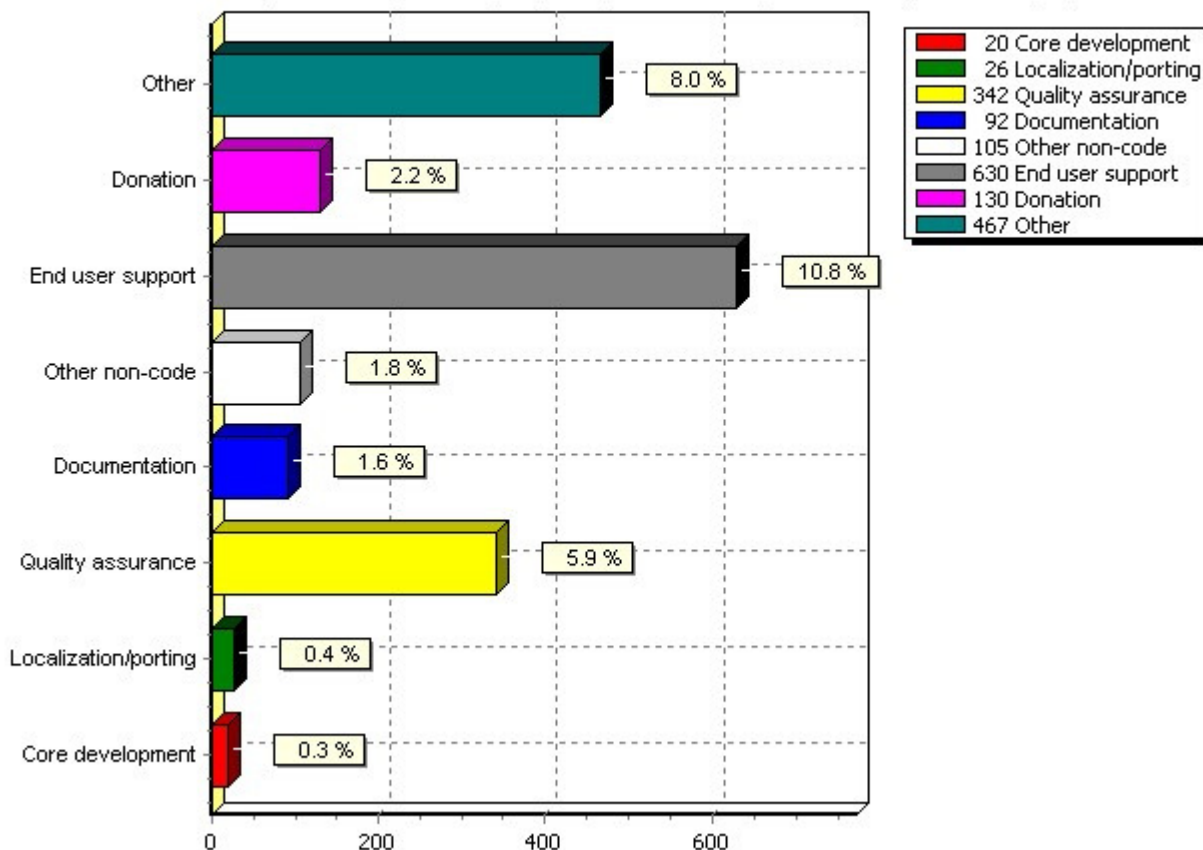
Analysis Commentary:

Interestingly, less than 1% of all respondents actually modify the source code in some manner. The greatest contributions from community members is in the area of end user support and quality assurance, two very important functions that really leverage the abilities of community members and help distribute the total cost of "development", including these non-core development activities, across a wide audience.

Has anyone else in your organization registered as a community member at the OpenOffice.org website, and actively participated in the community in the last 12 months in some way?

Has anyone else in your organization registered as a community member at the OpenOffice.org website, and a

■	176 Yes
■	746 No
□	2,197 Don't know

23.9 %

5.6 %

70.4 %

In the last 12 months, in what ways have others in your organization participated in the OpenOffice.org community? (select all that apply)

In the last 12 months, in what ways have others in your organization participated in the OpenOffice.org co...

13	Core development
20	Localization/porting
36	Quality assurance
29	Documentation
17	Other non-code
76	End user support
7	Donation
73	Don't know
8	Other

Other — 0.1 %
Don't know — 1.3 %
Donation — 0.1 %
End user support — 1.3 %
Other non-code — 0.3 %
Documentation — 0.5 %
Quality assurance — 0.6 %
Localization/porting — 0.3 %
Core development — 0.2 %
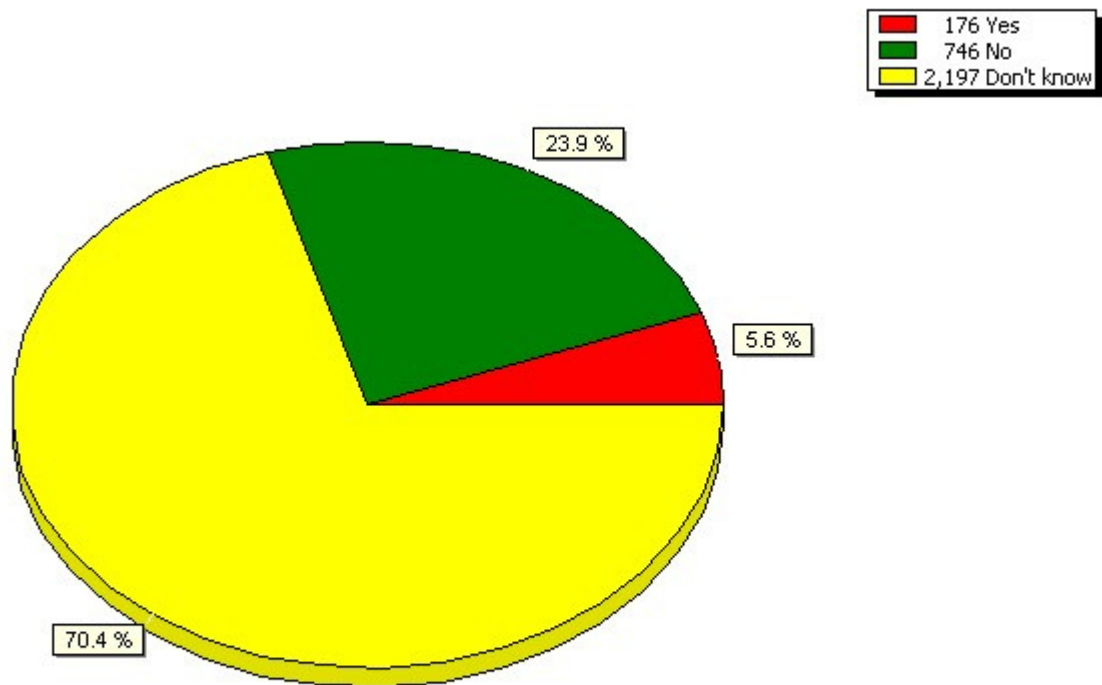
Do you or your organization ship or embed a packaged set of OpenOffice.org binary code as part of your product or service?

Do you or your organization ship or embed a packaged set of OpenOffice.org binary code as part of your pro...

■	91 No
■	5 Unbranded
□	13 OOo brand
■	4 Company brand
□	1 Third party brand
■	10 Don't know

73.4 %

8.1 %

0.8 %

3.2 %

10.5 %

4.0 %

Analysis Commentary:

Of those respondents using OpenOffice.org in some way to generate revenue, almost three quarters do not actually distribute a packaged version of OpenOffice.org (either their own version, or a third party version). Of those who do, most rely on the OpenOffice.org brand as the brand associated with their package.

Approximately what percentage of your or your organization's worldwide revenue is from products and/or services in which OpenOffice.org is shipped or embedded? ("shipped or embedded" occurs when OpenOffice.org is effectively the lead product, like StarOffice, or it is embedded in the lead product or service, or it is shipped together with or in association with the lead product or service)

Approximately what percentage of your or your organization's worldwide revenue is from products and/or se

Mean = 25.67
Min = 1.00, Max = 90.00
Median = 20.00

Legend:
- 5 0.00 thru 9.00
- 5 10.00 thru 19.00
- 2 20.00 thru 29.00
- 3 30.00 thru 39.00
- 1 40.00 thru 49.00
- 4 50.00 thru 59.00
- 0 60.00 thru 69.00
- 0 70.00 thru 79.00
- 0 80.00 thru 89.00
- 1 90.00 thru 99.00

Chart values: 23.8 %, 23.8 %, 9.5 %, 14.3 %, 4.8 %, 19.0 %, 0.0 %, 0.0 %, 0.0 %, 4.8 %

X-axis labels: 0.00 thru 9.00   20.00 thru 29.00   50.00 thru 59.00   80.00 thru 89.00
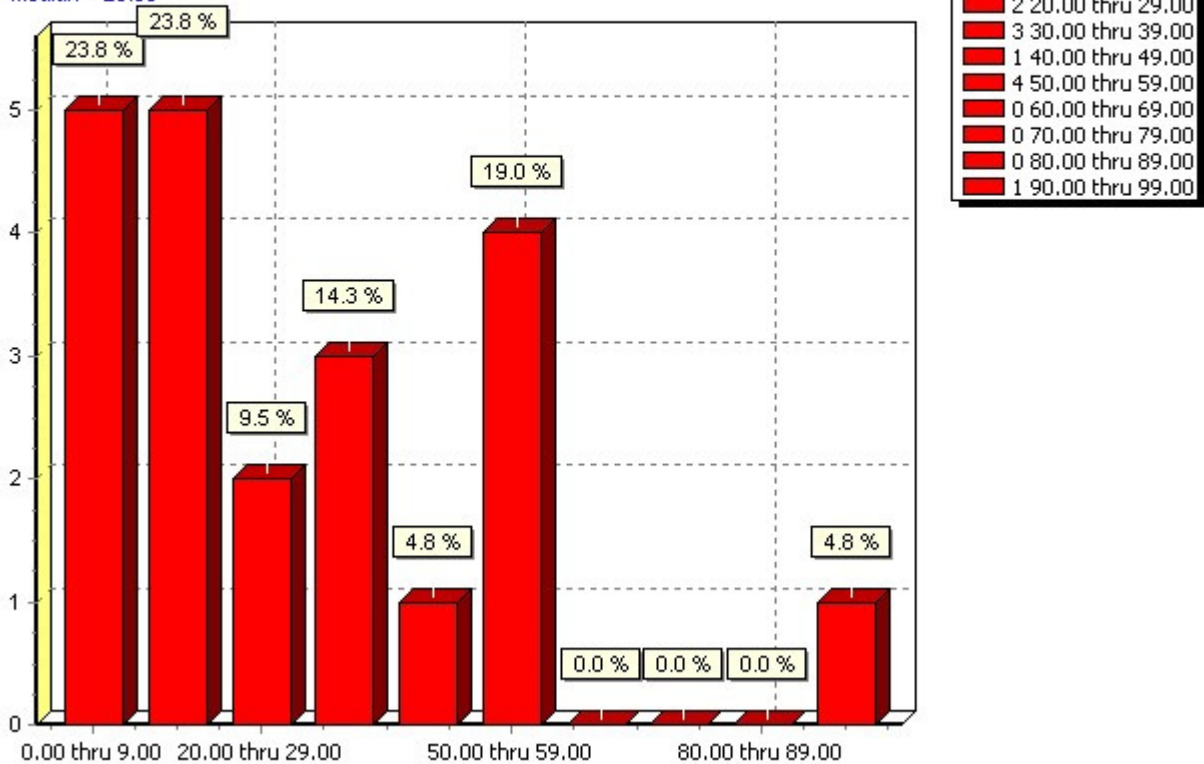
Analysis Commentary:

It would appear that for those respondents shipping a version of OpenOffice.org, very few are basing the majority of their revenue stream on OpenOffice.org. This measure, plus the fact that there is a wide variety of types of companies and business models associated with generating revenue from OpenOffice.org (see next slides), leads IDC to believe that it is still relatively early in the life cycle of companies attempting to commercialize OpenOffice.org

OpenOffice.org is effectively the lead product (e.g. StarOffice)(Totaling 100%, what percentage of revenue from products and/or services in which OpenOffice.org is shipped or embedded comes from:)

OpenOffice.org is effectively the lead product (e.g. StarOffice)

Mean = 39.91
Min = 0.00, Max = 100.00
Median = 25.00
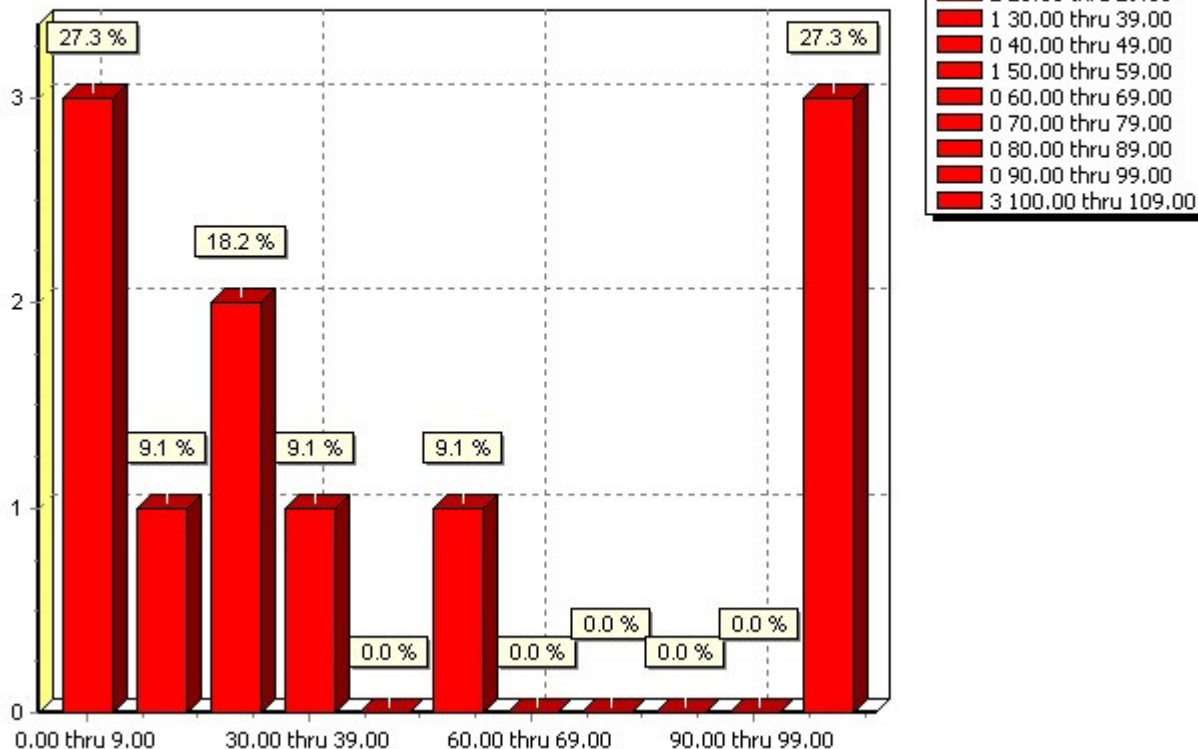
Legend:
- 3 0.00 thru 9.00
- 1 10.00 thru 19.00
- 2 20.00 thru 29.00
- 1 30.00 thru 39.00
- 0 40.00 thru 49.00
- 1 50.00 thru 59.00
- 0 60.00 thru 69.00
- 0 70.00 thru 79.00
- 0 80.00 thru 89.00
- 0 90.00 thru 99.00
- 3 100.00 thru 109.00

OpenOffice.org is embedded in the lead product or service(Totaling 100%, what percentage of revenue from products and/or services in which OpenOffice.org is shipped or embedded comes from:)

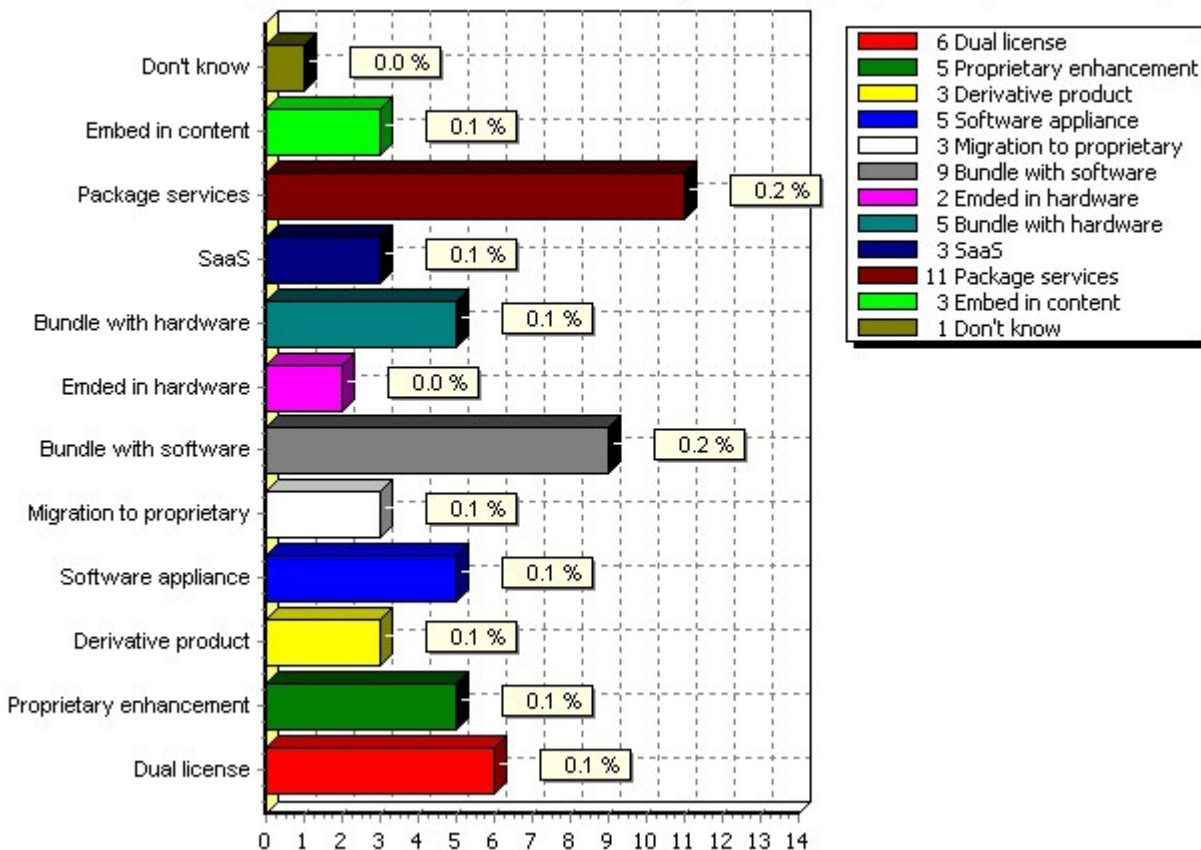### OpenOffice.org is embedded in the lead product or service

Mean = 25.09
Min = 0.00, Max = 100.00
Median = 20.00

4	0.00 thru 9.00
1	10.00 thru 19.00
1	20.00 thru 29.00
2	30.00 thru 39.00
2	40.00 thru 49.00
0	50.00 thru 59.00
0	60.00 thru 69.00
0	70.00 thru 79.00
0	80.00 thru 89.00
0	90.00 thru 99.00
1	100.00 thru 109.00
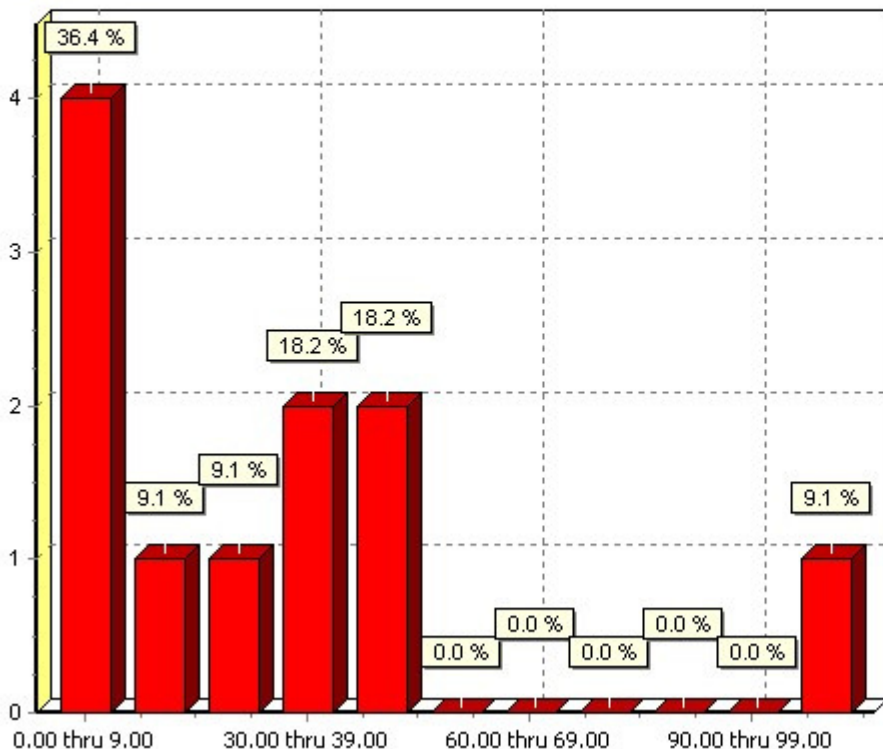
OpenOffice.org is complementary to the lead product or service (i.e. shipped together with or in association with the lead product or service)(Totaling 100%, what percentage of revenue from products and/or services in which OpenOffice.org is shipped or embedded comes from:)

OpenOffice.org is complementary to the lead product or service (i.e. shipped together with or in associati...

Mean = 72.27
Min = 20.00, Max = 100.00
Median = 90.00

Legend
0 0.00 thru 9.00
0 10.00 thru 19.00
1 20.00 thru 29.00
2 30.00 thru 39.00
1 40.00 thru 49.00
0 50.00 thru 59.00
0 60.00 thru 69.00
0 70.00 thru 79.00
1 80.00 thru 89.00
1 90.00 thru 99.00
5 100.00 thru 109.00
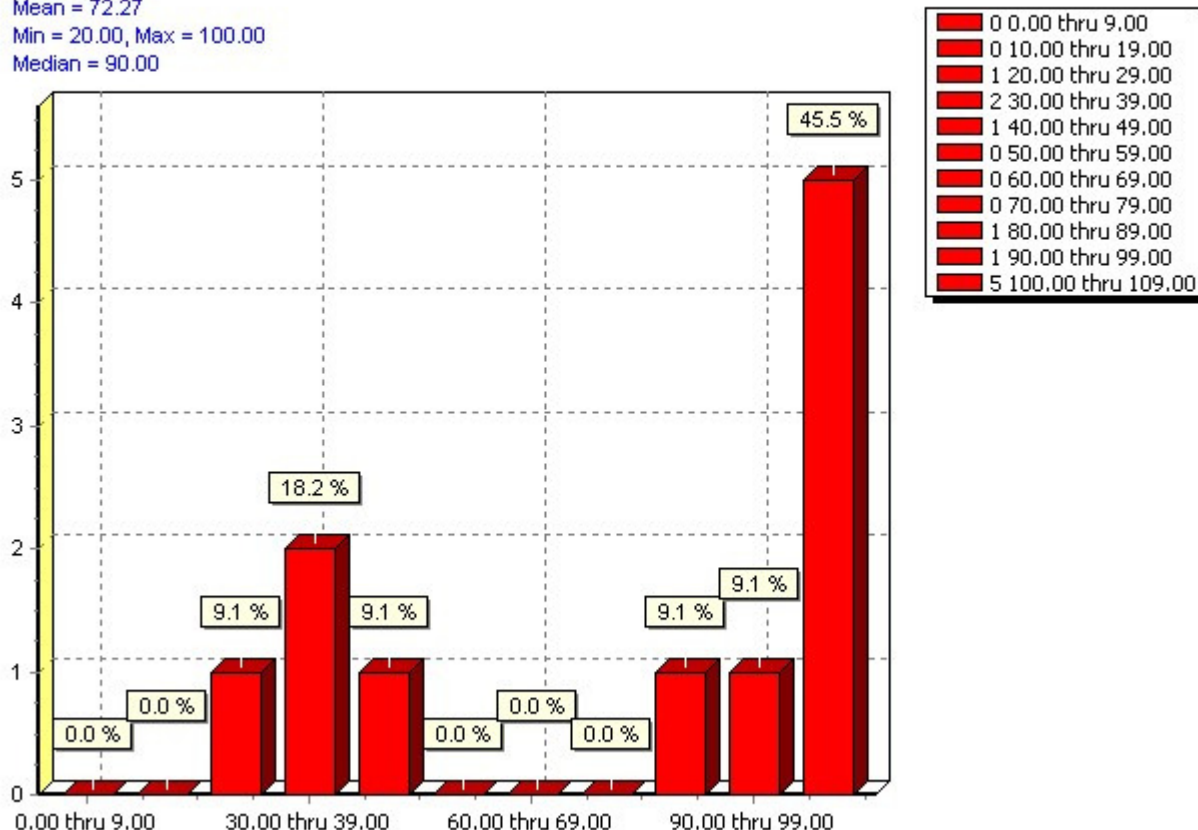
Analysis Commentary:

Interestingly, where respondents are basing their revenue on OpenOffice.org, they are doing so indirectly, i.e. they are charging for complementary products and/or services, not for OpenOffice.org shipped with those products or services.

Don't know - enter 100 here if you don't know the answer to this question(Totaling 100%, what percentage of revenue from products and/or services in which OpenOffice.org is shipped or embedded comes from:)

Don't know - enter 100 here if you don't know the answer to this question

Mean = 98.75
Min = 90.00, Max = 100.00
Median = 100.00
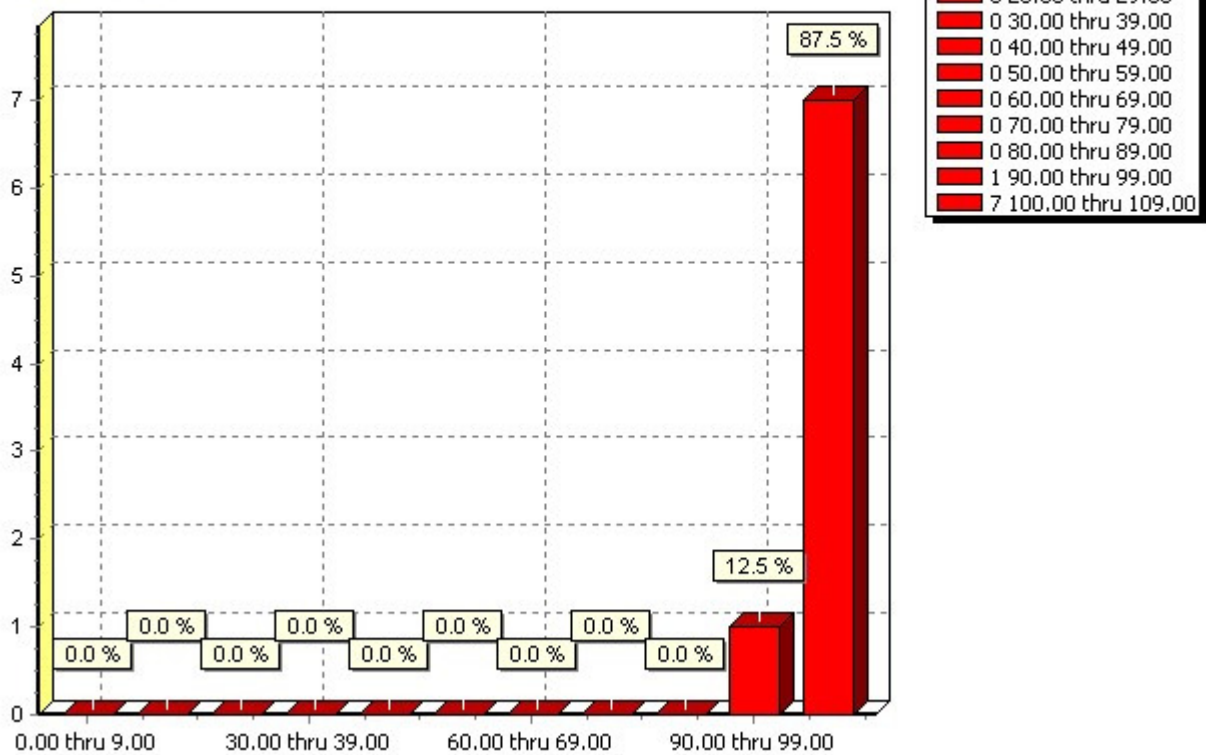
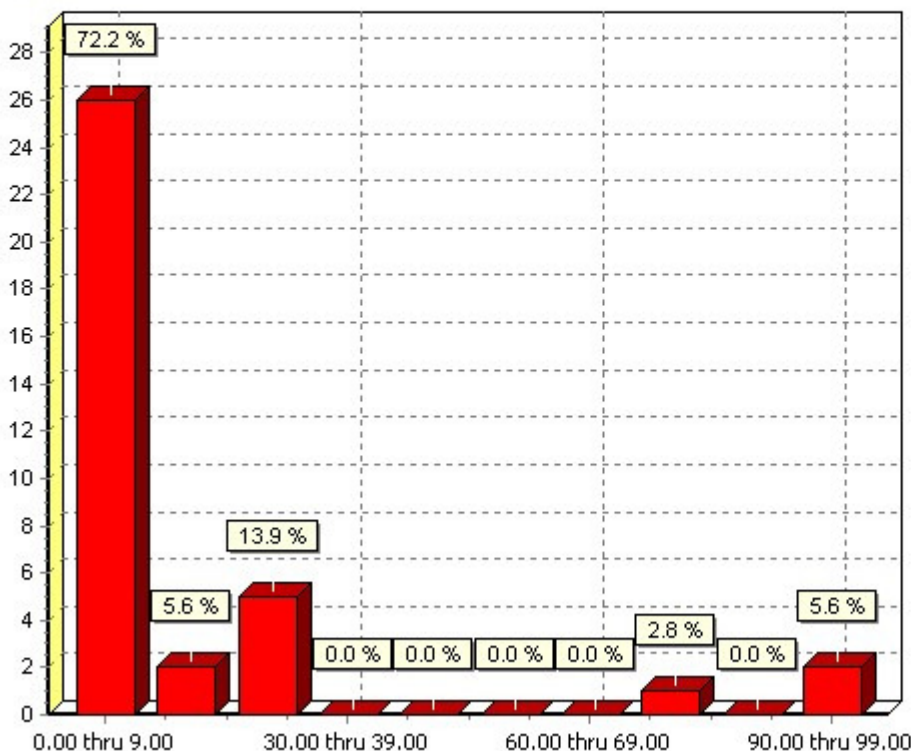| Legend |
|---|
| 0 0.00 thru 9.00 |
| 0 10.00 thru 19.00 |
| 0 20.00 thru 29.00 |
| 0 30.00 thru 39.00 |
| 0 40.00 thru 49.00 |
| 0 50.00 thru 59.00 |
| 0 60.00 thru 69.00 |
| 0 70.00 thru 79.00 |
| 0 80.00 thru 89.00 |
| 1 90.00 thru 99.00 |
| 7 100.00 thru 109.00 |

Which of the following possible business models describes your strategy for generating revenue from products and/or services tied to OpenOffice.org? (select all that apply)

Which of the following possible business models describes your strategy for generating revenue from produc..

Category	Value
Don't know	0.0 %
Embed in content	0.1 %
Package services	0.2 %
SaaS	0.1 %
Bundle with hardware	0.1 %
Emded in hardware	0.0 %
Bundle with software	0.2 %
Migration to proprietary	0.1 %
Software appliance	0.1 %
Derivative product	0.1 %
Proprietary enhancement	0.1 %
Dual license	0.1 %

Legend:
- 6 Dual license
- 5 Proprietary enhancement
- 3 Derivative product
- 5 Software appliance
- 3 Migration to proprietary
- 9 Bundle with software
- 2 Emded in hardware
- 5 Bundle with hardware
- 3 SaaS
- 11 Package services
- 3 Embed in content
- 1 Don't know

Analysis Commentary:

We see a variety of business models at play for commercializing OpenOffice.org. No one business model stands out as the favoured model.

For a complete description of business models available to organizations attempting to generate revenue from open source software, please refer to IDC's Worldwide Open Source Software Business Models Taxonomy - 2006, IDC #204547, December 2006.

IT software products developed by your company (including license, maintenance, subscription, and software-based transaction revenue; both pre-packaged and software-as-a-service)(Totaling 100% what percentage of your organization's worldwide revenue is from the following types of product and service offerings? (IT = Information Technology))


IT software products developed by your company (including license, maintenance, subscription, and software.

Mean = 24.28
Min = 0.00, Max = 100.00
Median = 10.00

Legend:
- 21 0.00 thru 9.00
- 3 10.00 thru 19.00
- 7 20.00 thru 29.00
- 1 30.00 thru 39.00
- 0 40.00 thru 49.00
- 2 50.00 thru 59.00
- 3 60.00 thru 69.00
- 2 70.00 thru 79.00
- 0 80.00 thru 89.00
- 1 90.00 thru 99.00
- 3 100.00 thru 109.00

Bar values: 48.8 %, 7.0 %, 16.3 %, 2.3 %, 0.0 %, 4.7 %, 7.0 %, 4.7 %, 0.0 %, 2.3 %, 7.0 %

X-axis: 0.00 thru 9.00, 30.00 thru 39.00, 60.00 thru 69.00, 90.00 thru 99.00
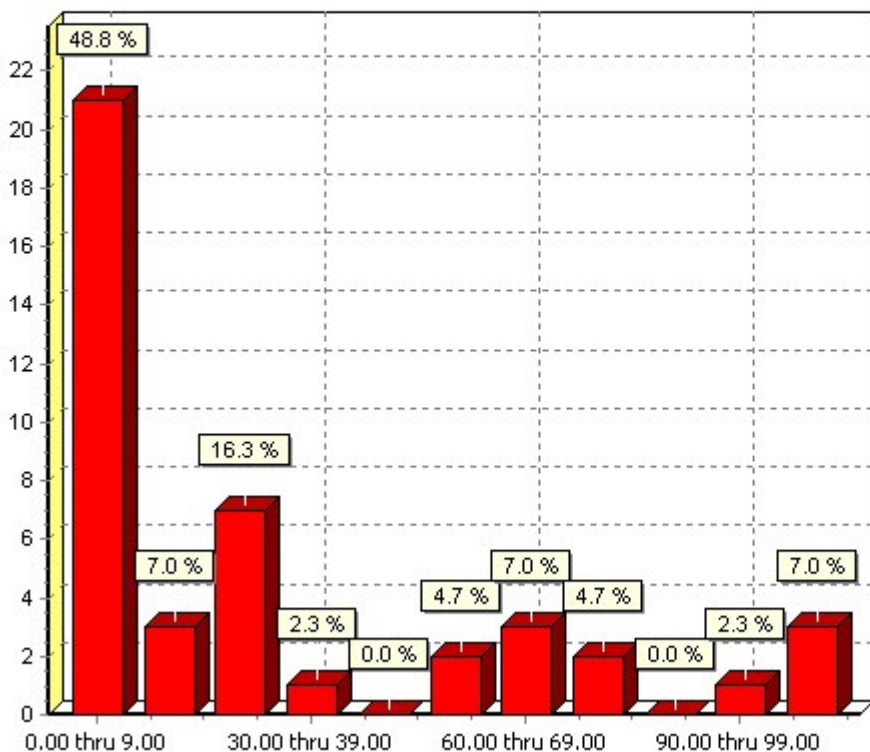
IT hardware products manufactured by your company(Totaling 100% what percentage of your organization's worldwide revenue is from the following types of product and service offerings? (IT = Information Technology))

IT hardware products manufactured by your company

Mean = 10.81
Min = 0.00, Max = 90.00
Median = 0.00

26	0.00 thru 9.00
2	10.00 thru 19.00
5	20.00 thru 29.00
0	30.00 thru 39.00
0	40.00 thru 49.00
0	50.00 thru 59.00
0	60.00 thru 69.00
1	70.00 thru 79.00
0	80.00 thru 89.00
2	90.00 thru 99.00

72.2 %
5.6 %
13.9 %
0.0 %
0.0 %
0.0 %
0.0 %
2.8 %
0.0 %
5.6 %

0.00 thru 9.00   30.00 thru 39.00   60.00 thru 69.00   90.00 thru 99.00

IT services delivered by your company (including consulting, custom programming, integration, implementation, training)(Totaling 100% what percentage of your organization's worldwide revenue is from the following types of product and service offerings? (IT = Information Technology))

IT services delivered by your company (including consulting, custom programming, integration, implementati

Mean = 35.50
Min = 0.00, Max = 100.00
Median = 25.00

16	0.00 thru 9.00
1	10.00 thru 19.00
10	20.00 thru 29.00
4	30.00 thru 39.00
2	40.00 thru 49.00
2	50.00 thru 59.00
1	60.00 thru 69.00
2	70.00 thru 79.00
1	80.00 thru 89.00
4	90.00 thru 99.00
5	100.00 thru 109.00

33.3 %
20.8 %
8.3 %
4.2 %
4.2 %
2.1 %
2.1 %
2.1 %
8.3 %
10.4 %

0.00 thru 9.00   30.00 thru 39.00   60.00 thru 69.00   90.00 thru 99.00
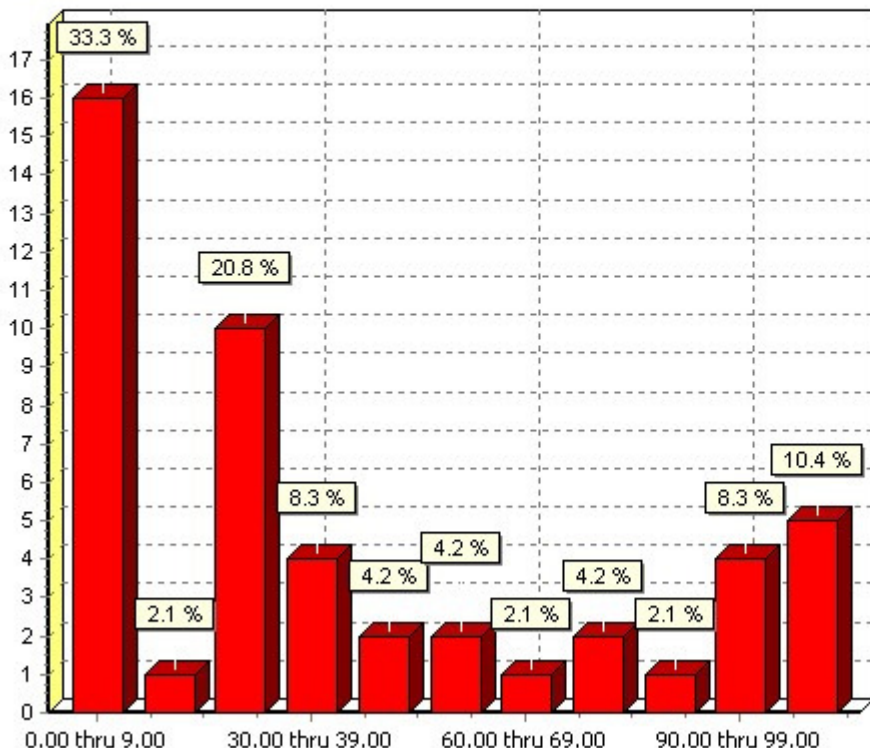
IT-enabled content delivered by your company (e.g. online publications, online commerce)(Totaling 100% what percentage of your organization's worldwide revenue is from the following types of product and service offerings? (IT = Information Technology))

IT-enabled content delivered by your company (e.g. online publications, online commerce)

Mean = 17.90
Min = 0.00, Max = 100.00
Median = 10.00

18	0.00 thru 9.00
5	10.00 thru 19.00
9	20.00 thru 29.00
1	30.00 thru 39.00
0	40.00 thru 49.00
3	50.00 thru 59.00
0	60.00 thru 69.00
1	70.00 thru 79.00
0	80.00 thru 89.00
0	90.00 thru 99.00
2	100.00 thru 109.00
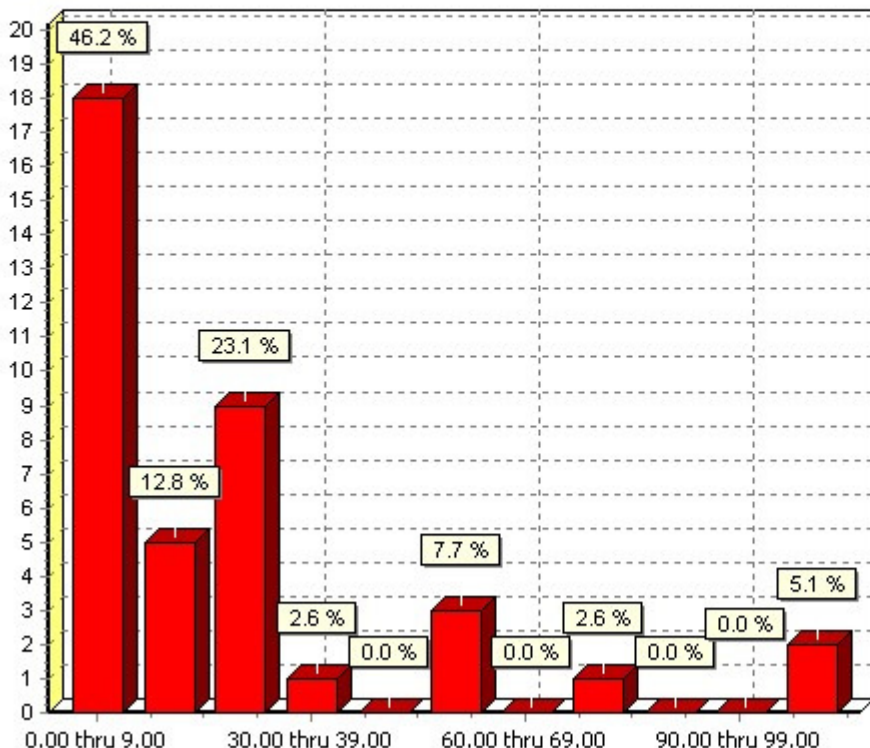
Third-party IT products and services resold by your company(Totaling 100% what percentage of your organization's worldwide revenue is from the following types of product and service offerings? (IT = Information Technology))

Third-party IT products and services resold by your company

Mean = 16.30
Min = 0.00, Max = 100.00
Median = 0.00

Count	Range
21	0.00 thru 9.00
4	10.00 thru 19.00
1	20.00 thru 29.00
1	30.00 thru 39.00
0	40.00 thru 49.00
2	50.00 thru 59.00
1	60.00 thru 69.00
0	70.00 thru 79.00
1	80.00 thru 89.00
0	90.00 thru 99.00
2	100.00 thru 109.00

63.6 %
12.1 %
3.0 %
3.0 %
0.0 %
6.1 %
3.0 %
0.0 %
3.0 %
0.0 %
6.1 %

0.00 thru 9.00   30.00 thru 39.00   60.00 thru 69.00   90.00 thru 99.00
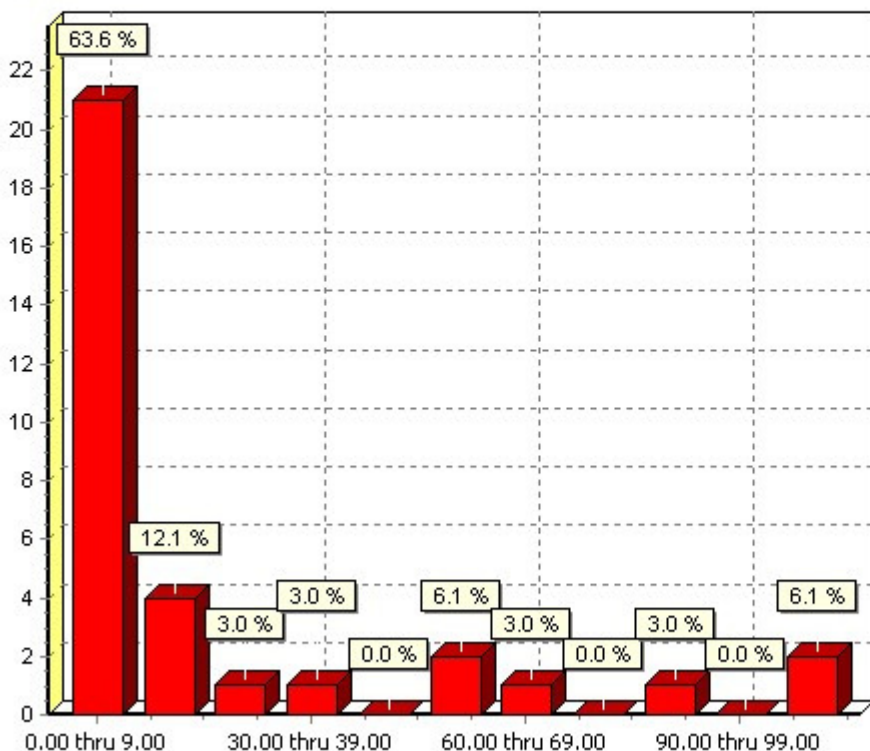
**Non-IT products and services (e.g. traditional paper-based publications, etc.)
(Totaling 100% what percentage of your organization's worldwide revenue is from
the following types of product and service offerings? (IT = Information
Technology))**

Non-IT products and services (e.g. traditional paper-based publications, etc.)

Mean = 53.02
Min = 0.00, Max = 100.00
Median = 70.00

14	0.00 thru 9.00
2	10.00 thru 19.00
0	20.00 thru 29.00
1	30.00 thru 39.00
1	40.00 thru 49.00
2	50.00 thru 59.00
1	60.00 thru 69.00
4	70.00 thru 79.00
1	80.00 thru 89.00
1	90.00 thru 99.00
15	100.00 thru 109.00
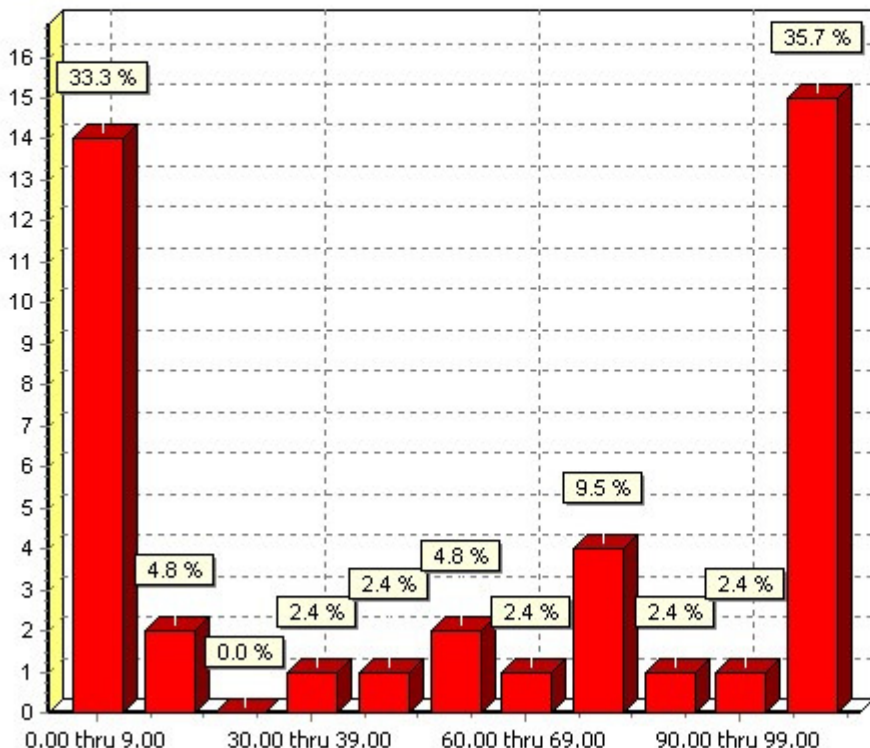
Don't know - enter 100 here if you don't know the answer to this question(Totaling 100% what percentage of your organization's worldwide revenue is from the following types of product and service offerings? (IT = Information Technology))

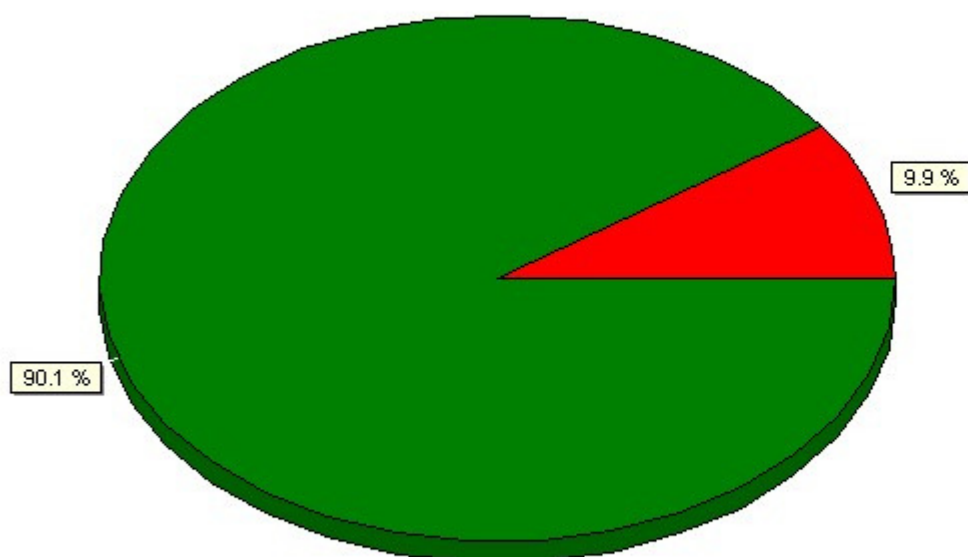**Don't know - enter 100 here if you don't know the answer to this question**

Mean = 87.27
Min = 0.00, Max = 100.00
Median = 100.00

7	0.00 thru 9.00
0	10.00 thru 19.00
0	20.00 thru 29.00
0	30.00 thru 39.00
0	40.00 thru 49.00
0	50.00 thru 59.00
0	60.00 thru 69.00
0	70.00 thru 79.00
0	80.00 thru 89.00
0	90.00 thru 99.00
48	100.00 thru 109.00
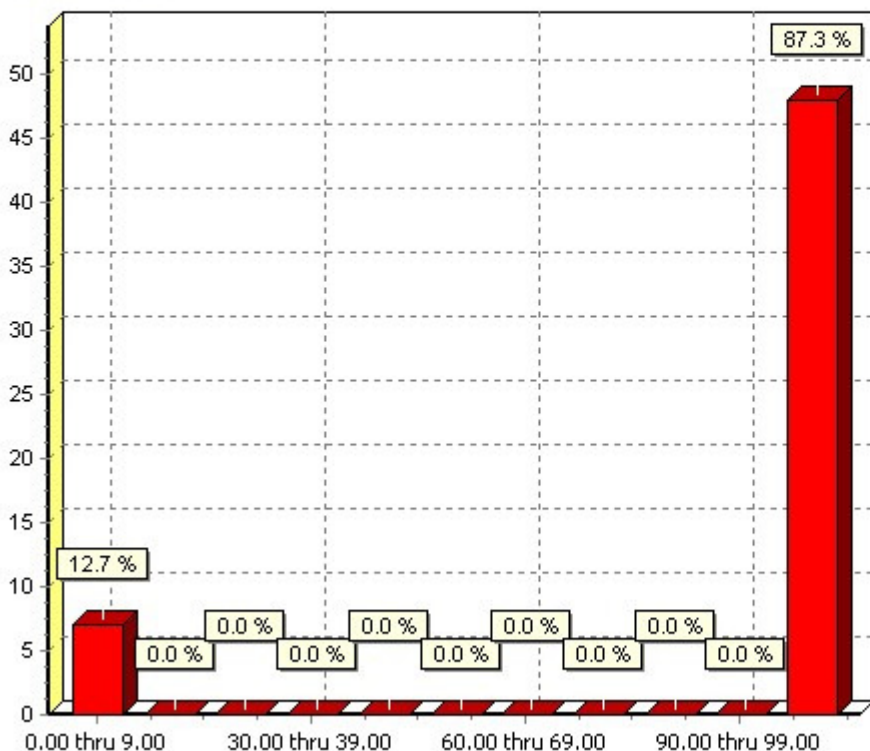
87.3 %

12.7 %

0.0 % 0.0 % 0.0 % 0.0 % 0.0 %
0.0 % 0.0 % 0.0 % 0.0 % 0.0 %

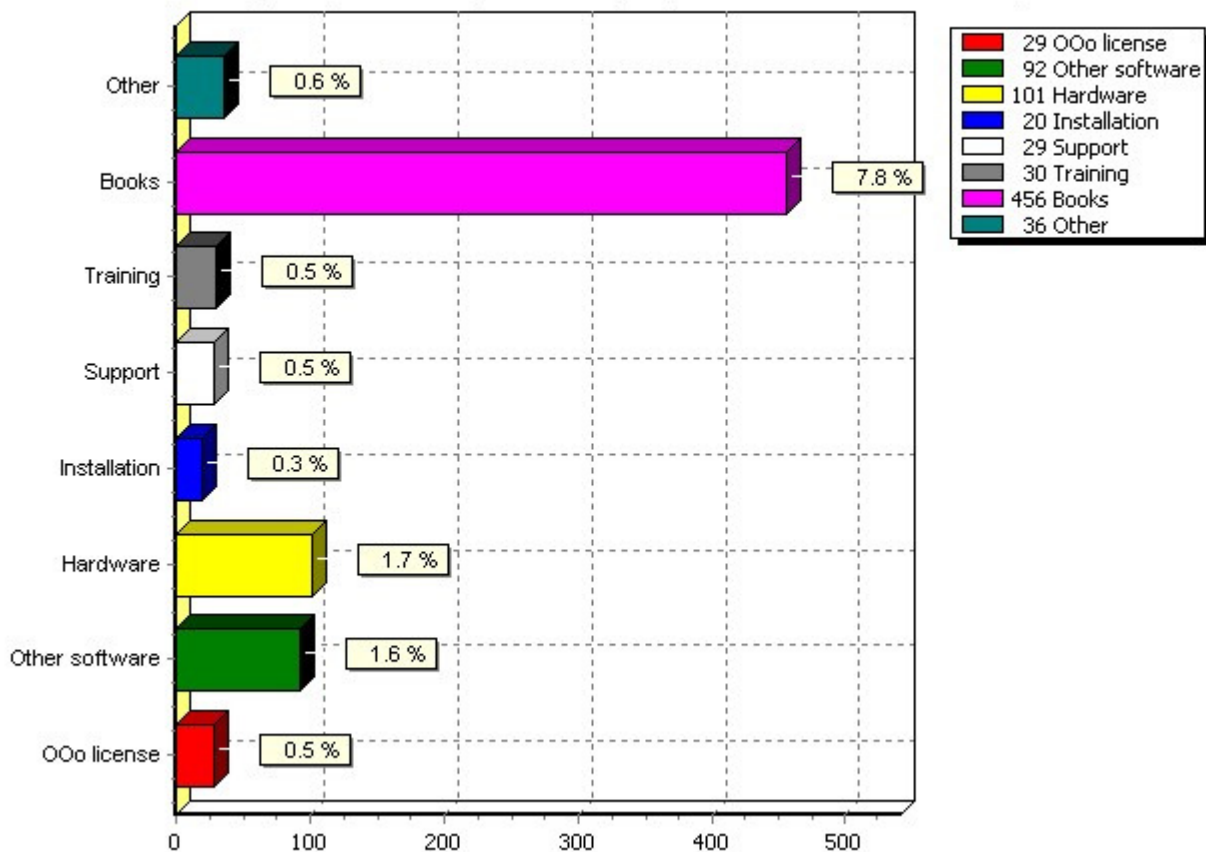0.00 thru 9.00　　30.00 thru 39.00　　60.00 thru 69.00　　90.00 thru 99.00

Have you personally purchased any products and/or services in conjunction with or as a result of your usage of OpenOffice.org (e.g. software license for OpenOffice.org, other software, hardware, support services, books, etc.)?

Have you personally purchased any products and/or services in conjunction with or as a result of your usag...

572 Yes
5,226 No

9.9 %

90.1 %

Please identify the types of products and/or services you purchased from the list below: (select all that apply)

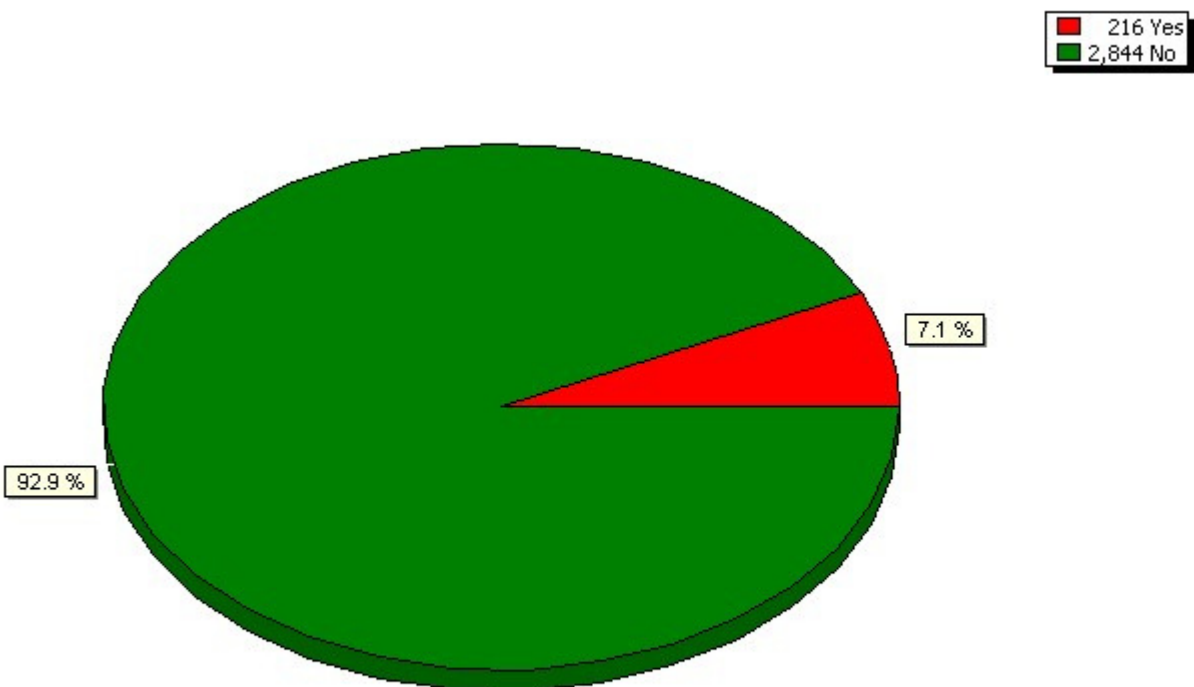Please identify the types of products and/or services you purchased from the list below: (select all that ...

Legend:
- 29 OOo license
- 92 Other software
- 101 Hardware
- 20 Installation
- 29 Support
- 30 Training
- 456 Books
- 36 Other

Category	Percentage
Other	0.6 %
Books	7.8 %
Training	0.5 %
Support	0.5 %
Installation	0.3 %
Hardware	1.7 %
Other software	1.6 %
OOo license	0.5 %

Analysis Commentary:

Books are by far the most popular purchased item in conjunction with the usage of OpenOffice.org.
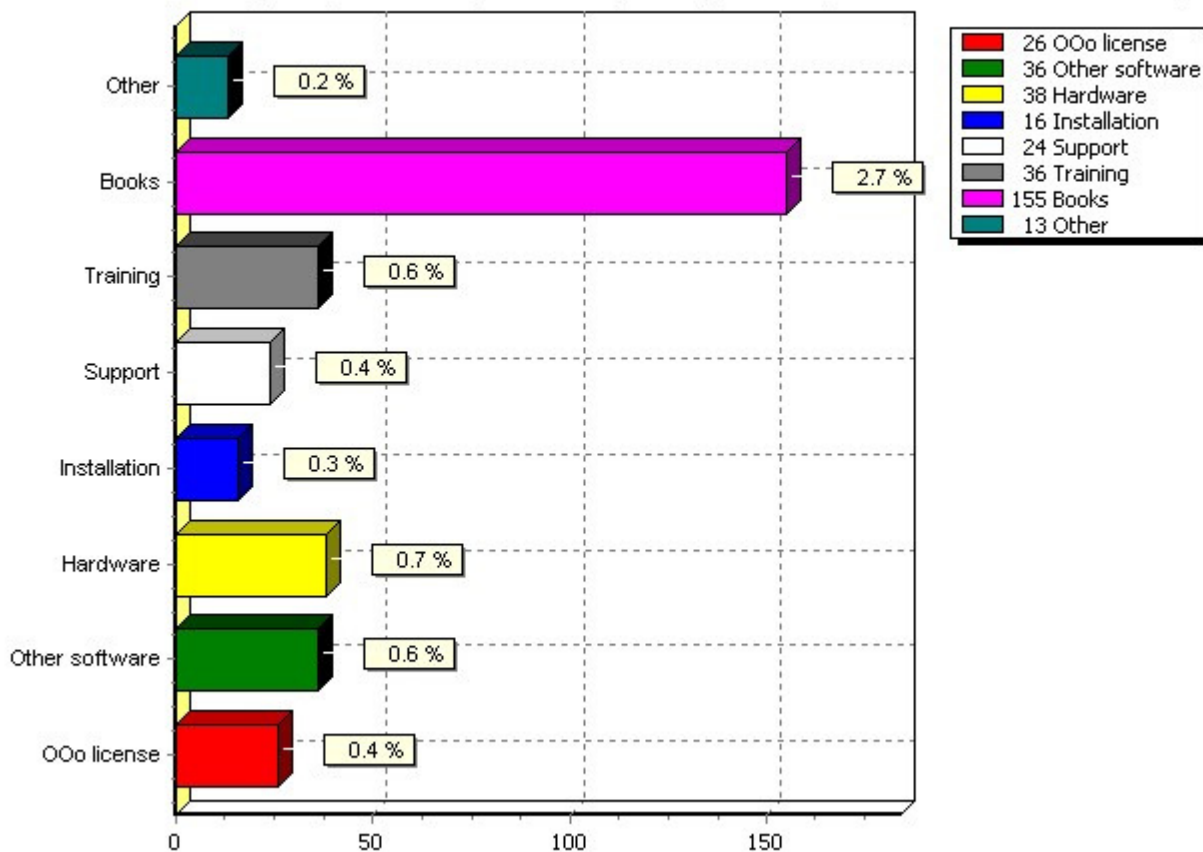
Has your organization purchased any products and/or services in conjunction with or as a result of your usage of OpenOffice.org (e.g. software license for OpenOffice.org, other software, hardware, support services, books, etc.)?

Has your organization purchased any products and/or services in conjunction with or as a result of your us...
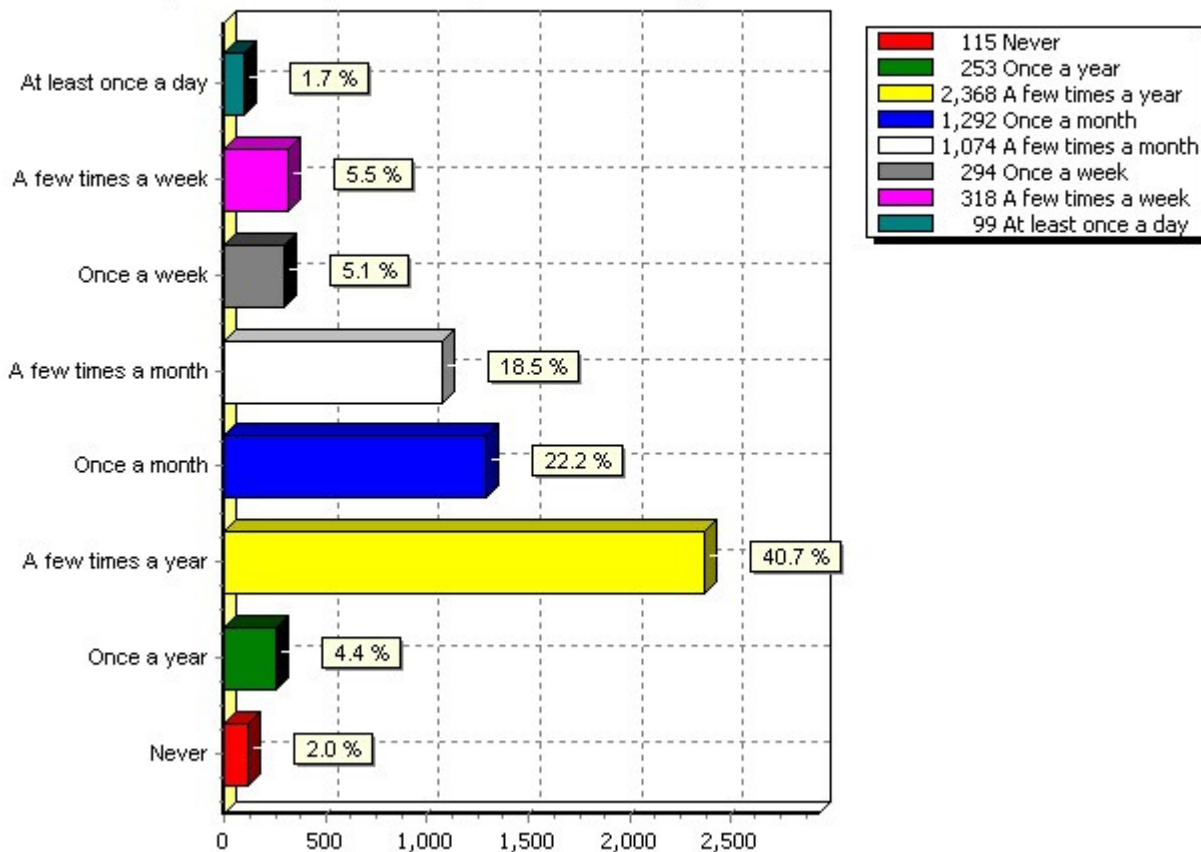
216 Yes
2,844 No

7.1 %

92.9 %

Please identify the types of products and/or services your organization purchased from the list below: (select all that apply)

Please identify the types of products and/or services your organization purchased from the list below: (se...

■	26 OOo license
■	36 Other software
■	38 Hardware
■	16 Installation
□	24 Support
■	36 Training
■	155 Books
■	13 Other

Other — 0.2 %
Books — 2.7 %
Training — 0.6 %
Support — 0.4 %
Installation — 0.3 %
Hardware — 0.7 %
Other software — 0.6 %
OOo license — 0.4 %

0　　50　　100　　150

How often do you visit the OpenOffice.org website on average?

How often do you visit the OpenOffice.org website on average?

115	Never
253	Once a year
2,368	A few times a year
1,292	Once a month
1,074	A few times a month
294	Once a week
318	A few times a week
99	At least once a day

At least once a day — 1.7 %
A few times a week — 5.5 %
Once a week — 5.1 %
A few times a month — 18.5 %
Once a month — 22.2 %
A few times a year — 40.7 %
Once a year — 4.4 %
Never — 2.0 %

0   500   1,000   1,500   2,000   2,500

Have you personally used open source software other than OpenOffice.org in the past 12 months?

Have you personally used open source software other than OpenOffice.org in the past 12 months?

■ 4,823 Yes
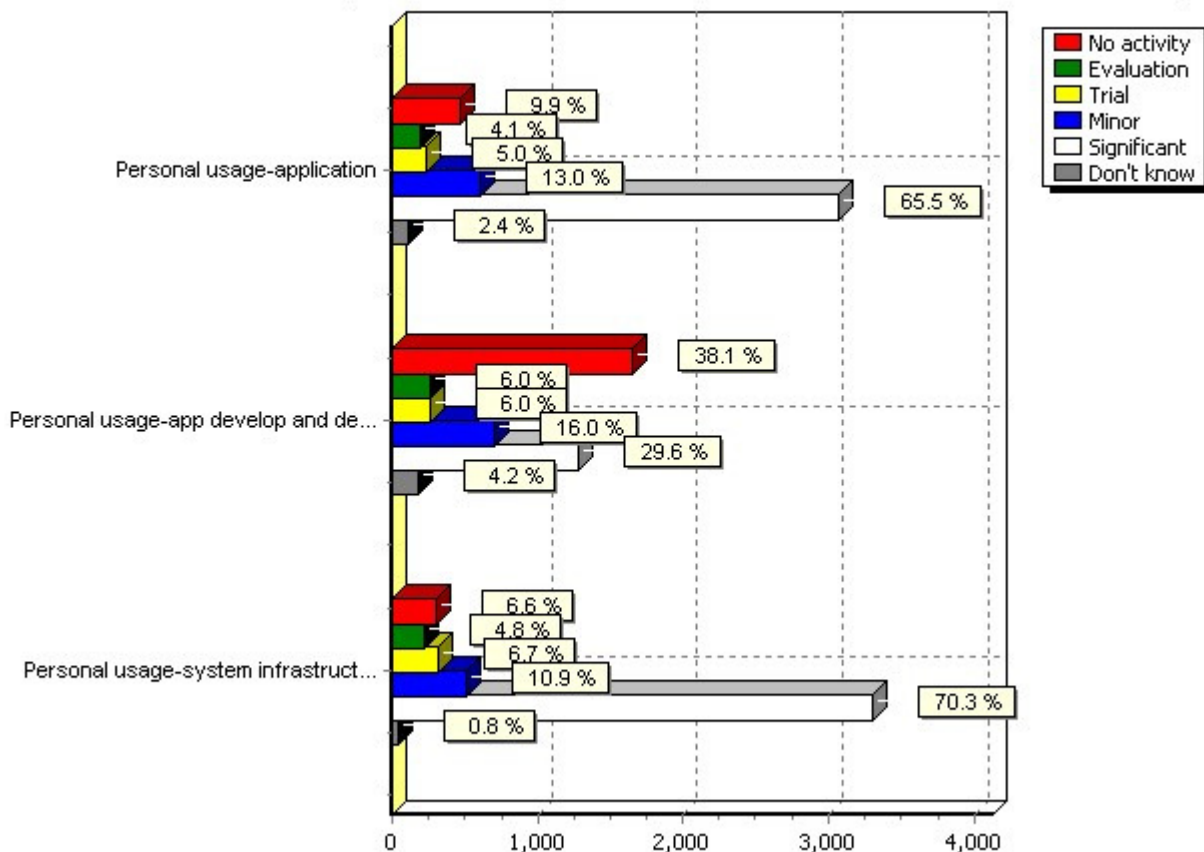■ 989 No

83.0 %

17.0 %
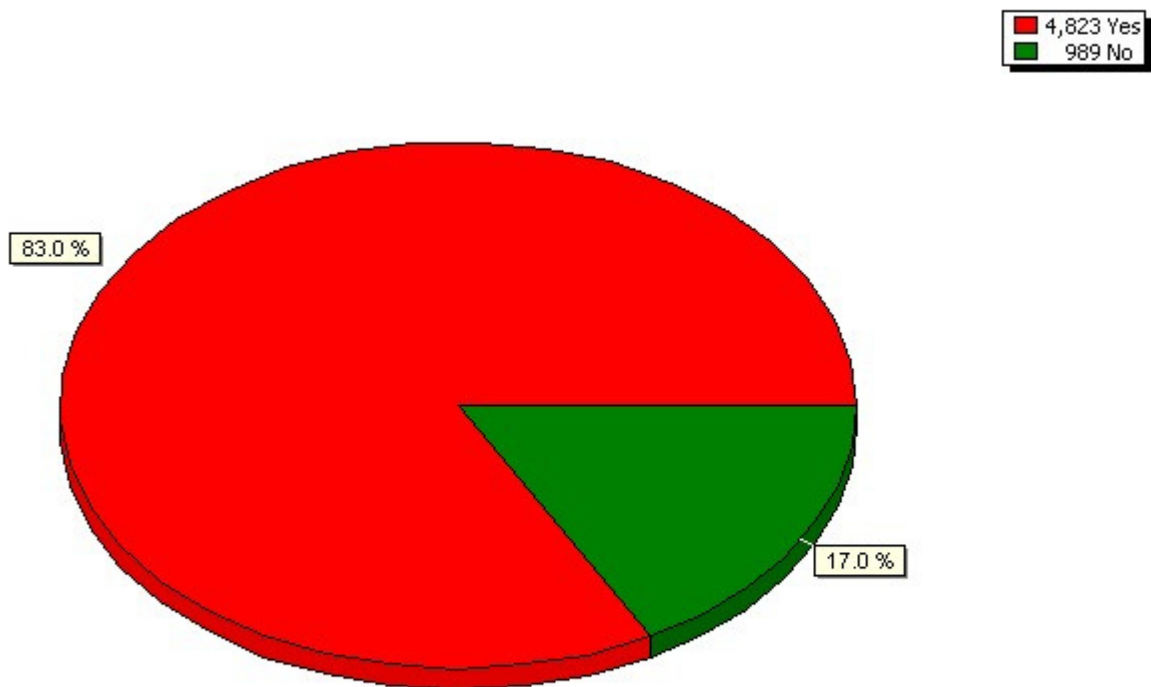
Analysis Commentary:

Not surprisingly, OpenOffice.org users are active users of other types of open source software.

Please indicate the extent of your personal usage of other open source software in the past 12 months, for the following categories of software:

Please indicate the extent of your personal usage of other open source software in the past 12 months, for...

	No activity
	Evaluation
	Trial
	Minor
	Significant
	Don't know

Personal usage-application
- 9.9 %
- 4.1 %
- 5.0 %
- 13.0 %
- 65.5 %
- 2.4 %

Personal usage-app develop and de...
- 38.1 %
- 6.0 %
- 6.0 %
- 16.0 %
- 29.6 %
- 4.2 %

Personal usage-system infrastruct...
- 6.6 %
- 4.8 %
- 6.7 %
- 10.9 %
- 70.3 %
- 0.8 %

0   1,000   2,000   3,000   4,000

Analysis Commentary:

And their usage of other open source software is significant across all types of software, although there is less personal usage of application development and deployment open source software. This is likely due to the demographics of OpenOffice.org users (they simply may not do much development), rather than any reluctance to use open source software for development or application deployment purposes.

Has your organization used open source software other than OpenOffice.org in the past 12 months?

Has your organization used open source software other than OpenOffice.org in the past 12 months?

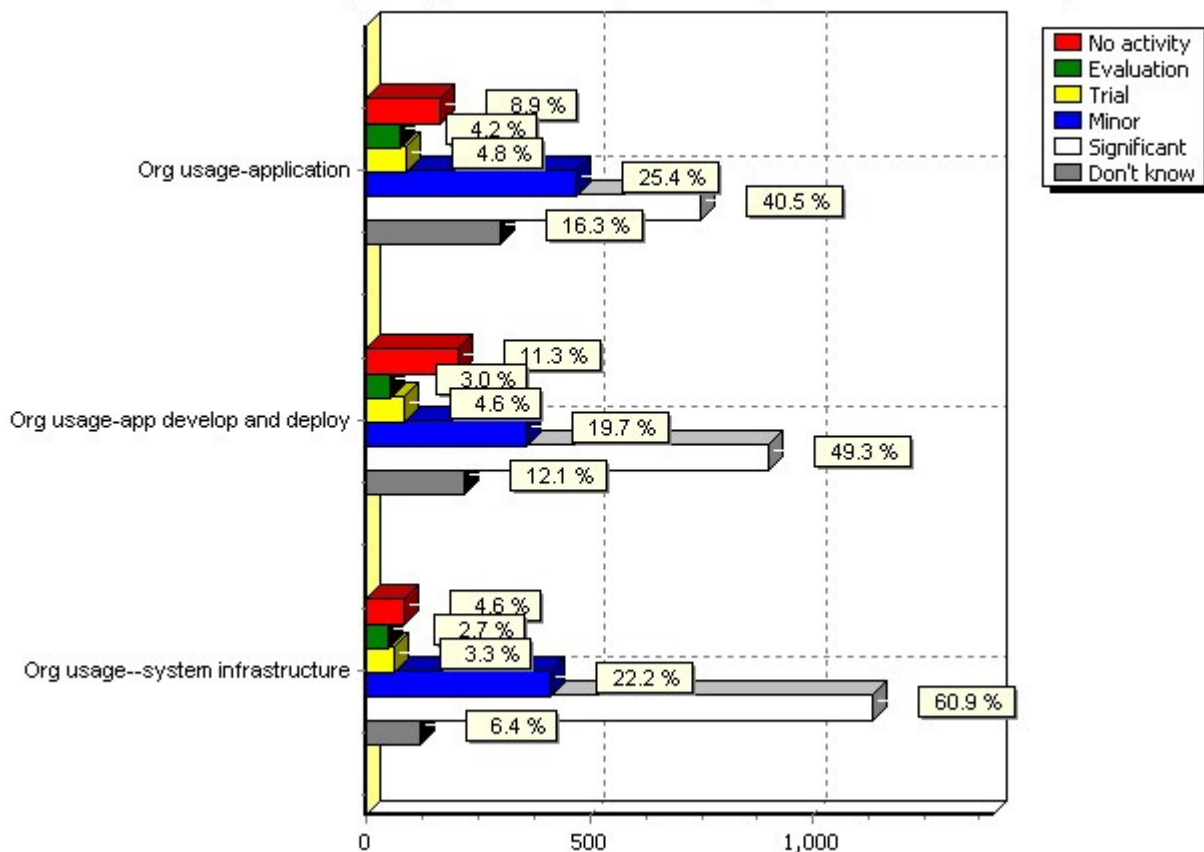|	
■	1,890 Yes
■	1,177 No

61.6 %

38.4 %
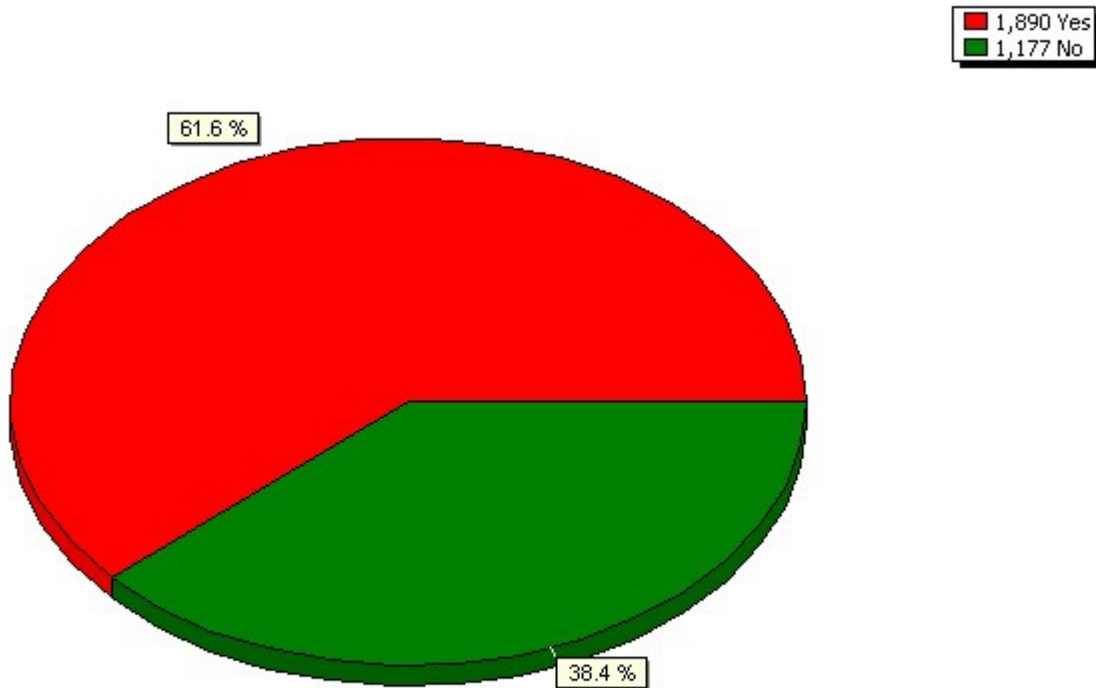
Analysis Commentary:

We see less penetration into the organization of other open source software than we saw for personal use, but still quite high penetration overall (almost 62%).

Please indicate the extent of your organization's usage of other open source software in the past 12 months, for the following categories of software:

Please indicate the extent of your organization's usage of other open source software in the past 12 month...

Legend:
- No activity
- Evaluation
- Trial
- Minor
- Significant
- Don't know

Org usage-application
- 8.9 %
- 4.2 %
- 4.8 %
- 25.4 %
- 40.5 %
- 16.3 %

Org usage-app develop and deploy
- 11.3 %
- 3.0 %
- 4.6 %
- 19.7 %
- 49.3 %
- 12.1 %

Org usage--system infrastructure
- 4.6 %
- 2.7 %
- 3.3 %
- 22.2 %
- 60.9 %
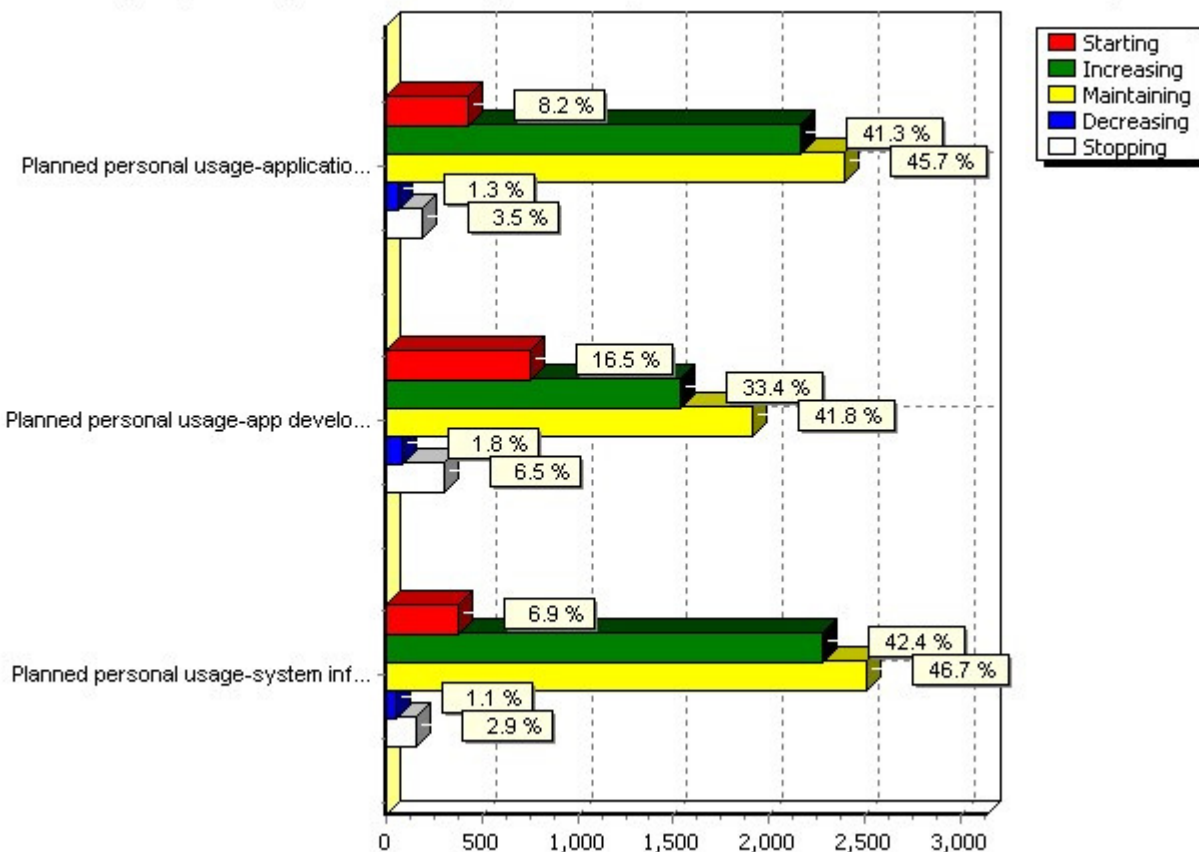- 6.4 %

Axis: 0, 500, 1,000

Analysis Commentary:

Surprisingly high adoption for minor or significant usage of open source software in these organizations is indicated by these respondents.   This level of adoption is not consistent with end user adoption surveys IDC has recently run. We believe that OpenOffice.org users may have an overly optimistic view of usage of open source software in their organizations, perhaps based on their enthusiasm for open source software given the fact they are all users of OpenOffice.org.

We note that the highest usage of other open source software occurs with system infrastructure software, which makes sense since Linux is classified as system infrastructure software. Usage declines the higher up the software stack we go, reflecting fewer open source projects that currently exist for these higher stack applications.

What are your personal plans for your usage of other open source software in the next 12 months, for the following categories of software:

What are your personal plans for your usage of other open source software in the next 12 months, for the f...

	Starting	Increasing	Maintaining	Decreasing	Stopping
Planned personal usage-applicatio...	8.2 %	41.3 %	45.7 %	1.3 %	3.5 %
Planned personal usage-app develo...	16.5 %	33.4 %	41.8 %	1.8 %	6.5 %
Planned personal usage-system inf...	6.9 %	42.4 %	46.7 %	1.1 %	2.9 %

0   500   1,000   1,500   2,000   2,500   3,000

Analysis Commentary:

As with planned usage of OpenOffice.org, respondents indicate that they are optimistic in at least maintaining and in many cases increasing their usage of other open source software.

What are your organization's plans for the usage of other open source software in the next 12 months, for the following categories of software:

What are your organization's plans for the usage of other open source software in the next 12 months, for ...
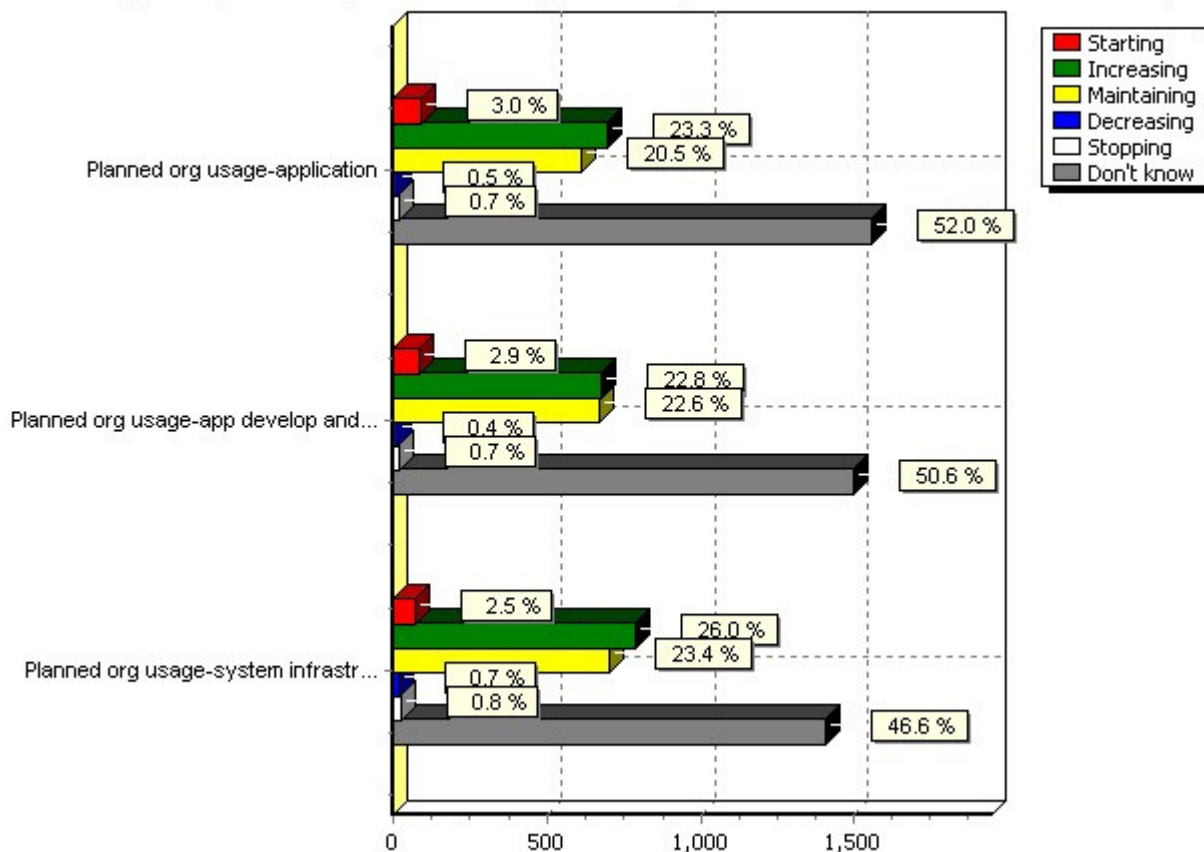
Analysis Commentary:

Most respondents did not have visibility into their organizations' plans for other open source software. Those who did indicated a high level of planned usage in the next year.

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