OSIA Member Survey Report

Survey carried out in April 2013.

Aims

1. To obtain a better understanding of the sentiments of its Members and other Open Source practitioners in regard to OSIA's activities.

2. To obtain a better understanding of the general state of the Open Source Software sector in Australia.

OSIA Member Survey Report

Interested in:

Establish set of baseline data which will enable the evolution and progress of Open Source software to be traced in future surveys.

The available capacity in Australia to deliver Open Source services and products, and human resource issues are of particular interest in this survey.

Trends rather than absolute data.

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Survey tool:

Limesurvey hosted on osia.com.au.

Survey Respondent sample:

Targeted multiple mailing list.

Estimate 700-800 emails sent, but its likely many people would have appeared on more than one mailing list.

Secondary invitation.

Arbitrary : 350-400 unique individuals. (50% of above)

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Responses:

Number of recorded responses   163

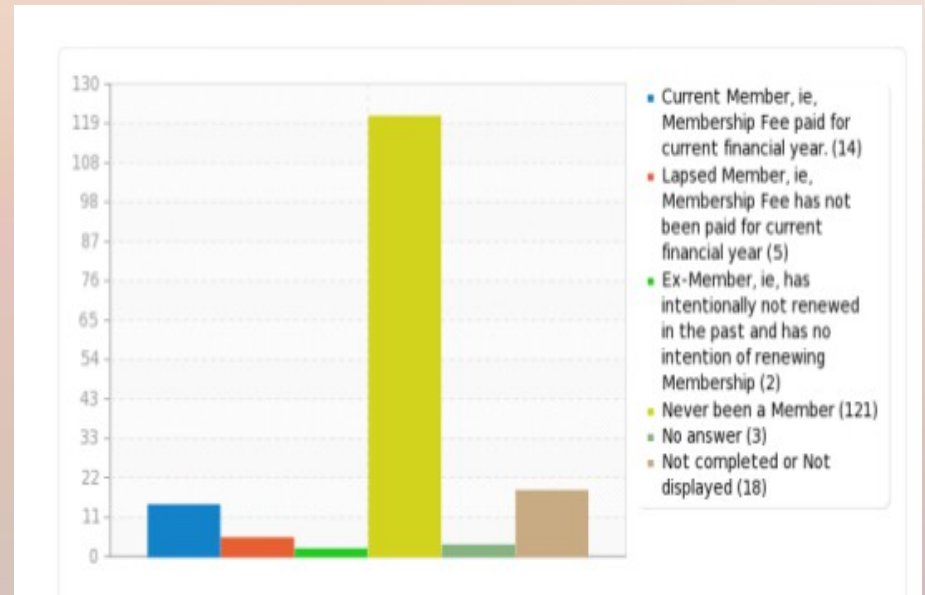Full responses   54

40% to 45% assuming between 400 – 350 individuals contacted.

Exceeded expectation.

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Membership Status:

Members   13%

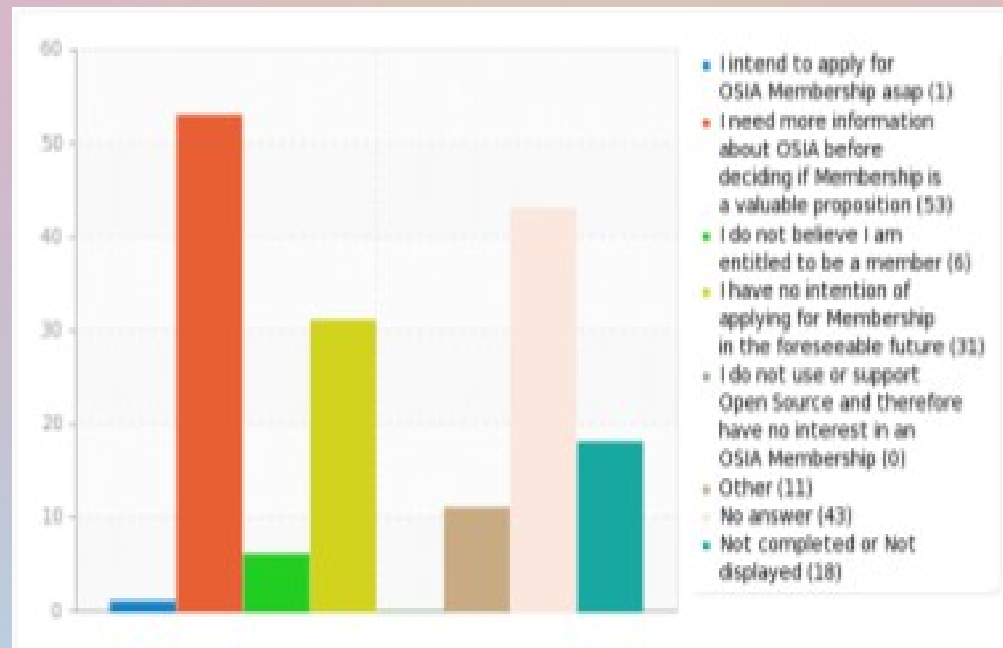Non_members   74%

No response   13%

Can indicate high interest in OSIA with non-members

Low Member response → disappointment

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Reason for non-Membership:

Most common response : need more information about OSIA (include did not know they were entitled to be a Member)

Second: Not interested in Membership

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Service and Product offerings:

Questions if respondent had an offering in a particular area.

- Support
- Support and minor customisation
- Full development

Wide spread over all application areas at all levels.

Good offering from Open Source business (10-30+)

Health/Medical informatics was low (2)

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- Development includes most or all major software development activities.

|	Support only	Support and minor customisation	Development and support
Linux/BSD/FOSS OS server system	○	○	○
Open Source software	○	○	○
Desktop	○	○	○
Cloud systems	○	○	○
Virtualisation (Xen, KVM, VMWare)	○	○	○
Open Source database systems	○	○	○
Web development including website design	○	○	○
CMS systems	○	○	○
ERP systems	○	○	○
Business Intelligence	○	○	○
Financial systems	○	○	○
eLearning systems	○	○	○
eCommerce systems	○	○	○
Health/Medical Informatics	○	○	○
Email systems	○	○	○
Telecommunication systems	○	○	○
Office Productivity tools	○	○	○
Groupware/Collaboration software	○	○	○
Multimedia, Sound and Video systems	○	○	○
GIS Systems	○	○	○
Scientific and High Performance software and systems	○	○	○
Education and Training for Open Source software and systems	○	○	○

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Work Activity Load

Asked respondent to rate their activity load in FOSS area.

Even spread from low to heavy, but low extremely heavy.

Indicates there is capacity to offer services.
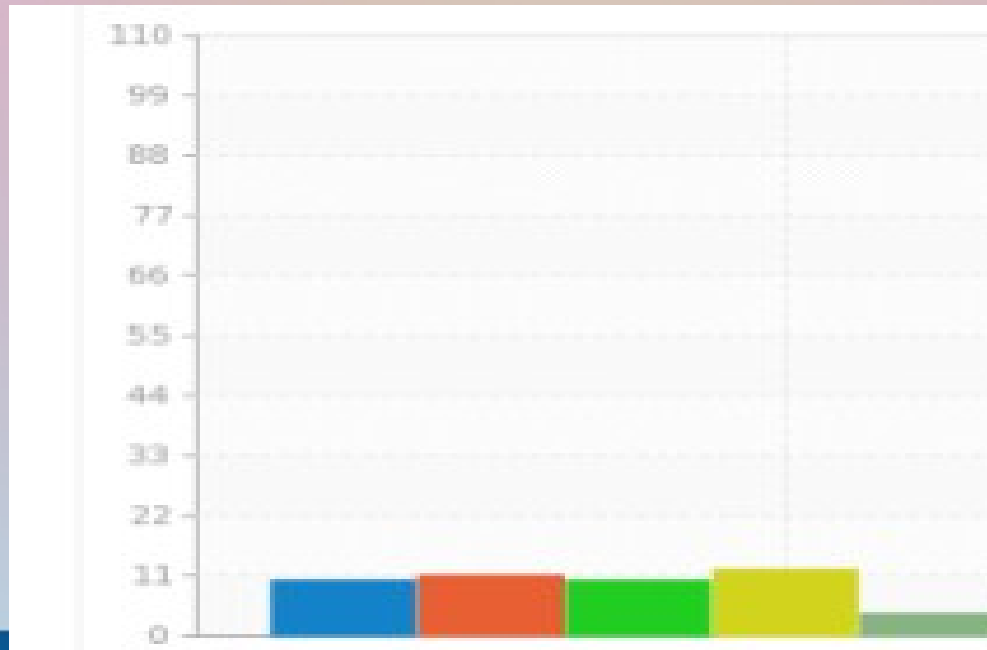
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OSIA Engagement Priority

[Prompt and timely response to occurrences relevant to Open Source, eg: via Media releases, submissions to Government, etc]	202
[Engagement with Education and Training sector]	201
[Engagement with Government at Federal, State and Local level]	200
[Furthering the cause of FOSS and improving the chances of business success]	199
[Engagement with Business Organisations and Business Enterprises in general]	192
[Promotion of Open Source business success stories by producing and publishing Case Studies]	191
[Engagement with other IT organisations (eg: AIIA, ACS, LUGs etc)]	187
[Engagement at International forums (eg: TPP negotiation) where there is an Open Source related issue at stake]	182
[Direct engagement with Members with regular communication to Members, eg, mailing list]	166
[Direct engagement with Members with meetings and member events]	158
[Engagement at International level with like minded organisations (eg: in NZ, Europe, Asia, US/Canada etc)]	154
[Provision of a Member Referral Service for potential clients]	139
[Development and promotion of, and adherence to a Strategic Plan (available on OSIA website)]	138

OSIA Member Survey Report

OSIA Engagement Priority
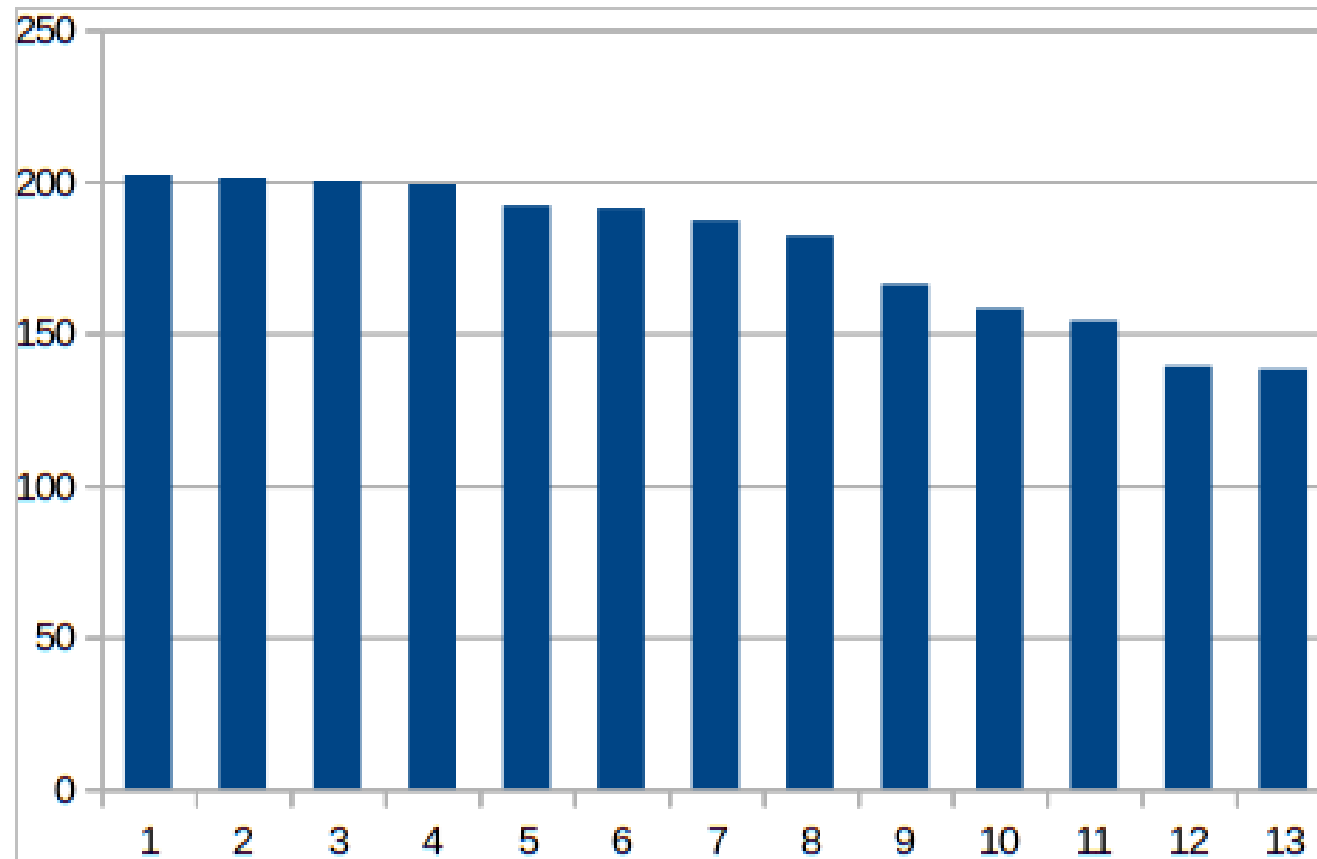
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Conclusion

OSIA needs to be more visible and responsive

More to promote Foss and Foss offerings

Reconnect with Members and potential member

Generally respondants have approved what has been done (eg: events, submissions etc)

Analysis of OSIA Survey 2013 Responses : Part 1

Introduction

OSIA conducted an online survey of individuals who have an interest in the Open Source software industry in Australia in April 2013.   Respondents provided their responses either as sole proprietor / practitioner or as representative of a business organisation. All responses were considered as anonymous, and all questions were optional, except for two questions. (These were about their OSIA membership status and their postcode.)

The aims of the survey were to:

1. To obtain a better understanding of the sentiments of its Members and other Open Source practitioners in regard to OSIA's activities.

2. To obtain a better understanding of the general state of the Open Source Software sector in Australia and enable baseline data to be established which will facilitate the evolution and progress of Open Source software to be traced in future surveys.   The available capacity in Australia to deliver Open Source services and products, and human resource issues are of particular interest in this survey.

Invitation to participate in the survey were made to a number of mailing lists, and participants were also requested to pass on the invitation to anyone they thought would be interested in participating in the survey.

A summary of responses which were received is provided below.

Survey tool

The survey was conducted using the open source Limesurvey version 2 software. The system was hosted on the osia.com.au server.

Statistics were generated by the Limesurvey statics generation features for all responses, and included summary tables and graphs.

Survey entries were collected over a period of approximately 2 weeks.

After an initial announcement and invitation were sent out, reminders were also sent out at the end of the first week, and a day before the close.

Respondent Sample

As mentioned above, invitation to participate in the survey was made via mailing lists. An estimated total of between 700 and 800 unique email addresses were sent an invitation, via several email lists. However, it is very likely that many individuals would appear on more than one list, and would have received two or more invitations.   Furthermore, as stated above, it is possible that other individuals not initially targetted were also invited to participate via secondary invitation, but we estimate this to be quite low in number. It is hence difficult to obtain an accurate number of

individuals who were contacted.

We therefore make an educated guess that the number of unique individuals who received an invitation to participate was likely to be around 350-400 (ie: half of original target)

Response logic

Given that most questions were optional, a survey response was deemed complete for OSIA if a response was submitted whether all questions were attempted or not. Also it was illogical for all questions to be answered, as some would have been made irrelevant due to a particular responses provided earlier.

While it would have been possible to use the survey logic features available in Limesurvey, this was not used because it was felt that respondents would easily be able to follow their own logic in responding, and that adding coded logic would unnecessarily add to the survey complexity, with little benefit obtained. It was also felt that allowing all to see all questions may help them gain a more complete understanding of the survey as a whole. (Furthermore, in an initial version of Limesurvey used, it appeared that survey logic prevented a hard copy of the survey to be produced automatically (bug?), although this was fixed in a subsequently released version of the software.)

Consequently, no inference should be drawn on Limesurvey's qualification of responses as being "unanswered" or "not relevant" in the generated statistical report.

Response rate

Number of responses recorded : 163

Of the 163, there were 54 responses which provided valid responses to all questions that could be answered.

This represents a response rate of between approximately 40% and 45% based on the assumption that between 350 and 400 unique individuals received an invitation.

We were very pleased with the total number of respondents, which exceeded our initial expectation. Admittedly the targeted population was likely to consist of individuals who would have an interest in the open source sector, but the response rate was still better than expected.

Summary of main points from the results

Membership Status

Of the responses received only 13% were from respondants who have indicated that either they were current members or have been past members. (21 responses).   74% reported to have never been a Member and the rest did not respond.

This result was disappointing in terms of Members responses. However it can be explained by the

fact that the largest email list to which invitation to participate was sent was the Linux Australia (LA) mailing list and many LA members are not OSIA members.   LA members though are likely to have a great interest in Open Source software issues and may have felt compelt to respond. We wish to acknowledge their input in this survey.

Note also that when reading the statics relating to questions that were applicable to OSIA Members only, the statics will show a large proportion of non-respondents (in the last 2 columns in the bar charts, and these columns are best ignored.)

Membership length

Average membership length was 6 yrs and shortest was 3 yrs. The value for shortest is consistent with the fact that there has been very few new members joining OSIA in the last 2 years.

Membership renewal

To the question asking why Members who had not recently renewed their Membership decided to not do so, the most common response was that they were *undecided whether they wanted to renew or not*.

Membership type

Of the members current or past that responded to the question, the membership types in order were:

    Small size business (10)
    Sole size proprietor   (6)
    Medium size business (2)
    Large size business (1)

Non-Member attitude to Membership

To the question asking non-members about their position on Membership, the most common response was that *they needed more information before deciding if they wanted to join OSIA or not*. (33%)

Participation to events organised by OSIA

Only 10 Members reported attending OSIA organised events in the last 2 years.

Event time: 6pm or later.

On a satisfaction scale of 1 to 5 (5 being highest satisfaction rating), all respondents reported either 4 or 5 to to their satisfaction of time of the events they attended.

Event time: breakfast

One response: 1.
One response: 4.

It is fair to infer that breakfast time events were not popular!

(Note however that the events which took place were co-organised with other organisations, and OSIA had no input on the time)

Event Venue, Event format and Event Catering:

Satisfaction rating were 4 or 5 for most responses, for all three aspects of events above.

Notification of event:

Satisfaction rating were evenly spread between 2, 3, 4 and 5.

This suggests that the event notification procedures need to be reviewed.

General comments on events:

9 Respondents provided comments on the events.

Reason for non-attendance:

When asked about their reason for non-attendance, 32% of ALL respondants (52/163) indicated that they were not aware of the functions taking place.

Note that in general, events were advertised to the Members mailing list mostly and not to the LA list. This may suggest that attendance at events could have been substantially larger, if the events were also advertised more widely outside the Members list.

Priority of engagements by OSIA

Respondants were asked to indicate the priority with which OSIA should place in a series of engagements it had or planned to undertake. In order of highest priority to lowest:
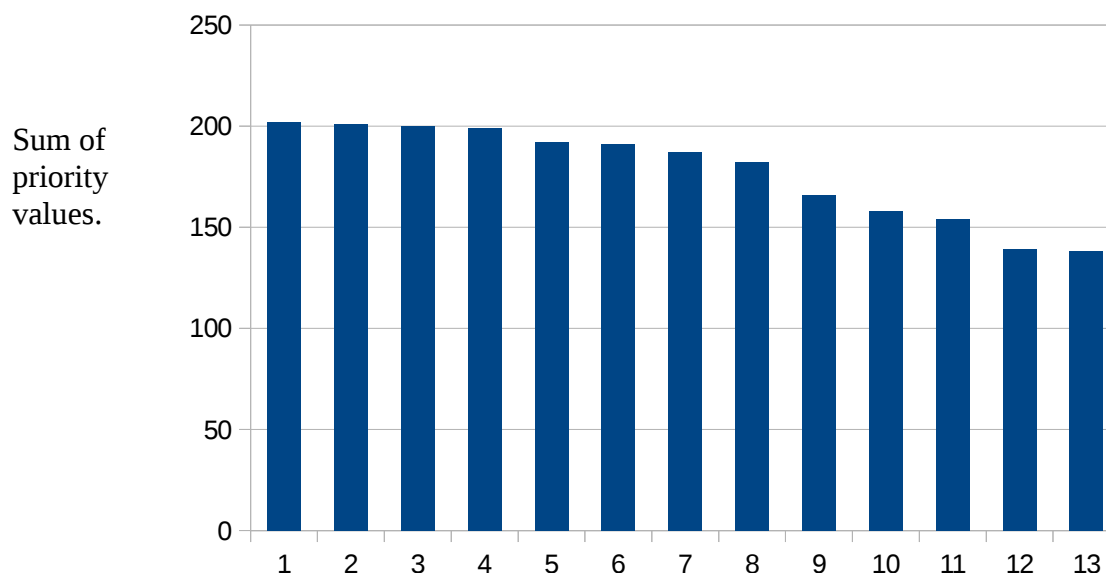
The numbers indicate the sum of priority values for each engagement for all responses. Highest priority value = 5 and lowest = 1. Therefore engagements which were listed higher will have a larger sum.

To note:

The high priority for *"Timely response to occurences ..."*, *"Engagement with Education ..."* and *"Engagement with Governments ..."*.

The low priority for *"Member Referral Service"* and *"Adherence to Strategic plan"*

[Prompt and timely response to occurrences relevant to Open Source, eg: via Media releases, submissions to Government, etc]	202
[Engagement with Education and Training sector]	201
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[Engagement with Business Organisations and Business Enterprises in general]	192
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[Engagement with other IT organisations (eg: AIIA, ACS, LUGs etc)]	187
[Engagement at International forums (eg: TPP negotiation) where there is an Open Source related issue at stake]	182
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Sum of priority values.

Specific actions to be undertaken by OSIA

18 responses were provided to a question asking for specific actions that OSIA may undertake.

BUSINESS ACTIVITIES OF RESPONDANTS

The following section relate to the responses about the business activities of the respondents.

Proportion of business that is IT related

Not surprisingly, 90% of those who respondent indicated that 80% or more of their business

activities ware IT related.

Proportion of business related to Open Source Software (FOSS)

However only about 45% indicated that 80% or more was FOSS based, and about 22% indicated that between 60% and 80% was FOSS based.

Products, service offerings and activities

Respondents were asked to indicate from a list of products and service offerings which level of service they were able to provide:

> Support only
> Support and minor customisation
> Full development.

The responses obtained indicated a wide spread of offerings at all levels for most of the products and service offerings.

Respondents also often indicated their willingness to provide new products and offerings in the future, that they are not already offering.

Business location

54 responses were recorded. Location of business from respondents were as expected given the population spread in Australia between states and capital cities. The one exception was the state of Tasmania which had proportionately more respondents.

Location of clients

54 responses were recorded. Again client location as reported by respondents were close to expectation, although there were slightly more clients reported for Victoria than NSW.

Activity Load

Respondents were asked about their activity load, ie how they were coping with their workload.

Responses were evenly spread between:

Low load and moderately high load.

Fewer respondents indicated that they found the work load excessive.

Business growth

When asked about growth capacity in their business, about 60% indicated that they found it hard to grow, either because of difficulty to find new customers or financial constraints.

Respondents also indicated that some difficulties were experience finding appropriate staff.

Future outlook

About 60% indicated that they expected that their activity in the open source sector will be better in 5 yrs from now, while about 40% indicated it will be the same.

Only 1 (of 54) respondent indicated that they expect it to decrease.

Raking of perception of open source by clients

Respondants were asked to indicate how their client generally feel about Open Source.

The most common response was that the client does not know that the solution is open source as long as it works.

General qualitative comments made by respondents

There were a number of comments made by respondents, but these have yet to be analysed and are not summarised in this report. The analysis of the written comments is show in Part 2 of the analysis. (file osia_survey_report_2.odt)

Analysis of OSIA Survey 2013 Responses : Part 2

Qualitative Responses (Comments text fields)

1. Question: If you offer services or products that do not fit in a category listed in the previous question, please describe below.

Answers provided:

1. Consulting, documentation, auditing, porting legacy systems to FOSS
2. Firmware
3. Secure Communications
4. Embedded Linux
5. Domain name services

2. Question: Please provide any comment you may wish about your professional activity load and work load.

Summary of responses:

Insufficient management skills stated as a reason for lack of progress in profession.
Market is seen as not being Linux friendly or Linux aware enough. (Adelaide)
Constraints existing as a result of employer-employee relationship.

3. Question: Please comment on specific obstacles you may have encountered selling your products and services as a consequence of being Open Source based

Summary of responses:

Positive:
No upfront cost is seen as good thing

Negative:
No customers to sell to
Influence of closed-source vendor FUD. (x2)
Unwillingness to pay for support, questionable value (x3)
"Breaking the ice"
Integrating FOSS to existing legacy software
Low upfront cost raise suspicion about software

4. Question: Please comment on specific advantages and benefits that may have been perceived by your clients about you offering products and services being based on Open Source software. Please comment on your *clients* perceptions not your own.

Summary of responses:

Cheap, low cost, no license (x6)
Reliable and does the job (x3)

No vendor lockin seen as long term resilience (x2)
Access to code enable bug fix and under user control (x2)
Impressed by software quality and features (x2)
Security (from virus)
Better service than commercial software

5. Question: Please comment on any topic as you may wish regarding OSIA and/or the state of Open Source activities in Australia.

Summary responses:

"There seems little commitment to open source within"
How do you get clients
OSIA seems to have been very quiet lately
Never heard of OSIA before.(x2)
Nice OSIA strategy paper...
More bridges between FOSS experts from different areas
"To work on: Why the goverment guys are only using the word Linux for bargaining prices with microsoft?"
Support OSIA TPPA actions
Keep the good work
More Direct communication with respondent (note: not sure what respondent meant by "Direct communication", perhaps it was meant to mean more "personal"?)

6. Question: Please comment on any aspect of this survey as you may wish.

Summary of responses:

Experienced trouble finding someone with foss skills (note: this comment appears to be a clarification to a response that was provided to an earlier question)
Postcode question is seen as raising a privacy issue.
Good survey (x4)
Survey was long (x2)

7. Question: OSIA is interested in identifying specific knowledge and skill sets that are desirable for a practitioner in the Open Source sector to possess. This may help in the development of Open Source training courses at appropriate level or development of a certification process for Open Source practitionners. Please indicate the knowledge and skills that you consider would be desirable, and if possible, in order of importance-

Summary of responses:

Java and Groovy Skills
Debian
Shell Programming
Ldap and AD and Apple server integration
Development in general
"Big data"
Inquisitiveness
Documentation skills

Communication skills
Time Management
Problem solving with software distributors and developer community
Total honesty; all the fundamentals of computing; solid work ethic; "professional flexibility" (i.e. the ability to hit the ground running on any project a client may have); ability (and willingness) to document everything, at a publishable standard; a through understanding of and commitment to the ideals of the F/OSS movements. In that order. And a little salesmanship doesn't hurt either. Note that product knowledge is completely irrelevant as anyone with a solid grounding in the fundamentals of computing who's prepared to work hard can acquire it rapidly enough.
General tertiary qualification in IT

8. Comments about OSIA organised events or jointly organised events:

In general comments were either neutral or positive.   There were no negative comments.

9. Negative comment made about OSIA.

There was only one overtly negative response made about OSIA, where the respondent essentially criticised OSIA for being too "closed onto itself".

10. General Comment.

In general one recurrent message coming from the survey is the lack of awareness and information about OSIA and including knowledge of its existence.

It is also apparent that respondents feel that there is insufficient understanding about open source source software in the community and suspicion about its value.

Recommendations for consideration by OSIA Board in view of Survey results

General comments:

These recommendations are high level and does not propose detail actions to be undertaken but instead propose a realignment or refocussing in OSIA activities.

Although a substantial number of respondents were not OSIA Members, it is assumed that the responses reflects OSIA Member sentiments in general.

1. That OSIA adjusts its emphasis and priorities in relation to its strategic plan in view of direct reflecting and matching objectives of the plan with expectations of Members (and other non-member respondents).

2. The engagement priorities were in order:

[Prompt and timely response to occurrences relevant to Open Source, eg: via Media releases, submissions to Governm
[Engagement with Education and Training sector]
[Engagement with Government at Federal, State and Local level]
[Furthering the cause of FOSS and improving the chances of business success]
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[Development and promotion of, and adherence to a Strategic Plan (available on OSIA website)]

The above suggest that respondents wants OSIA to be more responsive to events.

OSIA need to look at ways it can improve its reponsiveness and it needs to be more visible when it does response.

3. OSIA needs to be seen to be promoting FOSS more. Generic brochure in addition to case sudy brochude.

4. OSIA needs to promote FOSS Solution offerings from its Members better.

5. Review its online presence: review website, social media presence etc. Use website to sell FOSS solutions.

6. Member referral service has a role to play in relation to 4 and 5 above.

Above are some ideas for further discussion.