Unified Communications
SURVEY

Exclusive Research
from *CIO magazine*

UNIFIED COMMUNICATIONS SURVEY

EXECUTIVE SUMMARY

Early Unified Communications Adopters Cite Improvements to Productivity & Information Delivery
Productivity gains and improved response time are among the greatest benefits of unified communications, according to a recent survey by CIO magazine. Among the 32 percent of IT buyers surveyed running unified communications solutions, increased productivity (64 percent) and faster response time and delivery of information (50 percent) are most frequently cited as major benefits. The survey, conducted in July, 2009 across 413 CIO.com visitors involved in technology purchases at their organizations, also finds that 35 percent of IT buyers are planning to implement unified communications within the next five years (20 percent have no plans to implement unified communications and 13 percent are still undecided).

Unified Messaging, Desktop Videoconferencing, Telepresence Top Technologies of Interest
IT buyers most frequently cite unified messaging, desktop videoconferencing and telepresence as technologies they are actively researching or have on their radar screens. VoIP (27 percent), corporate videoconferencing (25 percent) and IP telephony (25 percent) are the most frequently cited unified communications technologies slated for upgrades in the coming year.

Unified Communications Technologies of Interest	Percent
Unified messaging (e.g., email/voicemail/instant messaging integration)	47%
Desktop videoconferencing	46%
Telepresence technology	45%
Cellular/Wi-Fi integration	43%
Corporate videoconferencing	37%
Speech recognition	35%
IP Telephony	34%
VoIP	32%
Smart phones	30%

Ease of Use Critical Factor for Unified Communications Implementation
Ease of use (79 percent) is overwhelmingly cited as a critical factor when deciding to implement unified communications solutions followed by ROI (57 percent), level of service (54 percent) and price (51 percent). When it comes to driving unified communications strategy, half of IT buyers surveyed say the CIO is primarily responsible while roughly one in five say responsibility falls with senior non-IT management (9 percent) or line of business owners (9 percent). Only 12 percent of respondents have a team representing various business functions (6 percent) or a dedicated product champion (6 percent) driving unified communication strategy at their organizations.

METHODOLOGY

The CIO Unified Communications survey was conducted among 413 CIO.com visitors involved in technology purchases at their organizations between July 23 and July 29 with the objective of measuring attitudes towards unified communications technologies and usage in the enterprise. A broad range of industries are represented including high tech, telecom & utilities (22 percent), government & nonprofits including education (15 percent), manufacturing (14 percent), financial services (14 percent), legal, consulting, real estate services (12 percent) and healthcare (8 percent). Company size distribution is as follows: <$100 million: 26 percent, $100 million - $999.9 million: 21 percent, $1 billion or more: 35 percent, not applicable/non-profit: 9 percent (9 percent of respondents were unsure). The margin of error on a sample size of 413 is +/- 4.8 percent. Percents on questions where respondents could select only one answer may not sum to 100 due to rounding. Not every respondent answered every question.

RESULTS BY QUESTION

In which of the following ways are you involved in the purchase process for IT products and services?	Percent
Any involvement (net)	100%
Determine need	61.3%
Determine requirements	57.1%
Evaluate	63.7%
Sell internally	30.5%
Recommend and select vendors	55.9%
Approve/authorize	44.6%

Is your organization currently using or planning to implement unified communications solutions (e.g., a set of products providing the same user interface and experience across various types of devices and media)?	Percent
Currently using/running	32.2%
Planning to implement within one year	19.6%
Planning to implement within 1-3 years	11.1%
Planning to implement within 3-5 years	4.1%
No plans to implement	20.1%
Not sure	12.8%

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You indicated your organization is currently using or planning to implement unified communications solutions. How many users do/will these solutions support? *(base: among those running or planning to implement unified communications solutions)*	Percent
20,000 or more	15.2%
10,000 - 19,999	7.9%
7,500 - 9,999	3.2%
5,000 - 7,499	3.6%
2,500 - 4,999	9.7%
1,000 - 2,499	14.8%
500 – 999	12.3%
100 – 499	19.9%
10 – 99	11.2%
Less than 10	1.8%
Mean number of users	5,536
Not sure	0.4%

Who is primarily responsible for driving unified communications strategy at your organization? (select one)	Percent
Senior IT management (e.g., CIO, VP IS/IT)	49.8%
No individual or group at this time - waiting to see how it evolves	14.6%
Senior non-IT management (e.g., CEO, CFO, COO)	9.2%
Line of business owners	8.7%
Unified communications team representing various business functions	6.1%
Dedicated unified communications champion	5.6%
Not sure	6.1%

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Which option best describes your plans for each of the following technologies in the next 12 months (select one only)	On My Radar	Actively Researching	Currently Implementing	Upgrading/ Refining	Not Interested
Cellular/Wi-Fi integration	31.7%	11.4%	12.1%	15.7%	29.1%
Corporate videoconferencing	20.6%	16.2%	18.2%	25.2%	19.9%
Desktop videoconferencing	25.4%	20.6%	16.7%	12.6%	24.7%
IP Telephony	20.6%	13.6%	24.5%	24.7%	16.7%
Smart phones	19.1%	11.1%	22.8%	22.8%	24.2%
Speech recognition	23.5%	11.9%	6.5%	5.3%	52.8%
Telepresence technology	26.6%	18.6%	8.7%	6.8%	39.2%
Unified messaging (e.g., email/ voicemail/instant messaging integration)	23.0%	24.0%	17.4%	19.6%	16.0%
VoIP	18.6%	13.6%	26.2%	26.9%	14.8%

Which of the following do you consider the greatest benefits of unified communications? (select up to three) *(base: among those running unified communications solutions)*	Percent
Increased productivity	63.9%
Faster response time/delivery of information	50.4%
Improved customer service	31.6%
Reduced travel costs	39.8%
Faster decision-making	30.1%
Better work/life balance	13.5%
Reduction in carbon footprint	8.3%
Not sure	3.8%

How important are the following factors in your decision to implement unified communications solutions?	Very important	Somewhat important	Not very important	Not at all important	Not sure
Ease of implementation	49.9%	36.6%	5.6%	1.9%	6.1%
Ease of use	78.7%	13.6%	1.2%	0.7%	5.8%
End user/customer demand	47.7%	35.6%	6.8%	1.7%	8.2%
Level of service	54.2%	34.6%	3.9%	1.0%	6.3%
Price	51.3%	37.0%	4.6%	1.0%	6.1%
Product features	42.4%	42.6%	7.5%	1.2%	6.3%
ROI	56.9%	29.5%	5.6%	1.5%	6.5%
Technical support	47.5%	40.7%	4.8%	1.2%	5.8%

Are you the top IT executive in your company or business unit?	Percent
Yes	38.8%
No	61.2%

Which of the following best describes your title in your organization?	Percent
IT-Related	**76.2%**
CIO/CTO	18.9%
CSO/CISO	1.2%
Vice President/Senior VP/Executive VP – IT Related Function	7.8%
Director/Manager/Supervisor – IT Related Function	33.5%
Staff – IT Related Function	14.8%
Non-IT Related	**23.8%**
CEO/President/Owner/Partner/COO/General Manager	8.3%
CFO/Treasurer/Controller	0.7%
Vice President/Senior VP/Executive VP – Non-IT Related Function	3.2%
Director/Manager/Supervisor – Non-IT Related Function	7.5%
Staff – Non- IT Related Function	4.1%

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Please select the dollar amount that best represents the annual gross sales or revenues for your organization or enterprise (include all plants, divisions, branches, parents, and subsidiaries)	Percent
$40 billion or more	9.0%
$30 billion to $39.9 billion	2.2%
$15 billion to $29.9 billion	2.7%
$10 billion to $14.9 billion	4.2%
$5 billion to $9.9 billion	5.4%
$1 billion to $4.9 billion	11.5%
$100 million to $999.9 million	21.3%
Less than $100 million	26.4%
Not applicable (e.g., nonprofit, government, union)	8.8%
Not sure	8.6%

Which of the following best describes your organization's industry or function?	Percent
High Tech, Telecom & Utilities	22.1%
Government and Nonprofits (including education)	14.8%
Manufacturing (including automotive, aerospace & defense, construction, engineering, chemical, metals & mining)	13.9%
Financial Services (banking, insurance, brokerage)	13.6%
Services (legal, consulting, real estate)	12.2%
Healthcare (providers and pharmaceuticals)	8.5%
Retail, Wholesale and Distribution	7.1%
Advertising/Marketing/PR/Media (publishing, broadcast, online)	3.4%
Transportation (airlines, trucking, railroads, shipping, logistics)	2.4%
Travel and Leisure (cruiselines, hotels, theme parks, casinos)	1.9%