



Technology Priorities **SURVEY**

Exclusive Research
from *CIO magazine*

Balanced Growth		25%
Growth	25%	
Growth and Income	25%	
Income	25%	
Cash Equivalents	25%	

Competitive Growth		25%
Growth	25%	
Growth and Income	25%	
Income	25%	
Cash Equivalents	25%	

TECHNOLOGY PRIORITIES SURVEY

EXECUTIVE SUMMARY

Cloud, BI and Business Process Management Top of Mind for IT Professionals

Cloud computing services (48 percent) top the list of technology priorities on the radar or among the technologies technology decision-makers are actively researching in the coming year, according to an exclusive survey conducted by *CIO* magazine in January 2010. The survey, conducted among 405 IT professionals involved in buying technology products and services for their organizations, also finds business intelligence applications (35 percent), business process management (35 percent), enterprise data management (32 percent), and enterprise architecture/SOA among the top technologies of interest.

Technology decision-makers are split between growth and innovation, and cost containment when it comes to the primary focus for IT investments in the coming year. Nearly half (49 percent) plan to focus on enabling business process innovation (29 percent) and creating topline revenue growth (20 percent) while an equal number are focused on lowering business operations costs (26 percent) and managing the IT infrastructure more efficiently (23 percent). Thirty one percent of the IT budget, on average, will be devoted to new development according to the IT professionals we surveyed.

Four out of Ten IT Professionals Now Implementing Mobile & Wireless Applications

Mobile and wireless applications are the most frequently cited technologies currently in production either enterprise-wide (31 percent) or on a division or business unit scale (11 percent). Server virtualization (39 percent), content/document management applications (38 percent) and security technologies such as identity management, data loss prevention and encryption technologies (37 percent) are also frequently cited technologies IT professionals are in the process of implementing across their business units or organizations.

METHODOLOGY

The CIO Technology Priorities survey was conducted among CIO.com visitors between January 21, 2010 and February 3, 2010 with the objective of gauging which technology areas IT professionals plan to focus on in the coming year. Results are based on 405 respondents who indicated involvement in technology purchasing decisions at their organizations. A broad range of industries are represented including high tech, telecom & utilities (19 percent), manufacturing (14 percent), government & nonprofits including education (13 percent), financial services (11 percent), healthcare (8 percent) and legal, consulting, real estate services (7 percent). Company size distribution is as follows: <\$100 million: 24 percent, \$100 million - \$999.9 million: 25 percent, \$1 billion or more: 35 percent, not applicable/non-profit: 9 percent (7 percent of respondents did not provide an answer). The margin of error on a sample size of 405 is +/- 4.9 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.

TECHNOLOGY PRIORITIES SURVEY

RESULTS BY QUESTION

Current Activity - Applications	On Radar/ Actively Researching	Piloting	In Production in BU or Division	In Production Enterprise-Wide	Upgrading/ Refining	Not Interested
Business intelligence	35%	9%	14%	12%	11%	19%
Business process management	35%	11%	10%	9%	7%	28%
Collaboration tools	26%	14%	14%	19%	7%	20%
Content/document management	28%	10%	16%	22%	9%	16%
Customer service/CRM	21%	8%	15%	21%	9%	26%
Enterprise resource planning (ERP)	16%	6%	11%	24%	11%	32%
Mobile/wireless	19%	10%	11%	31%	10%	20%
Open source technologies	24%	10%	15%	14%	4%	33%
Security technologies (e.g., identity management, data loss prevention, encryption)	28%	8%	13%	24%	10%	17%
Supply chain management software	16%	4%	11%	12%	6%	51%
Video conferencing/telepresence	19%	9%	15%	21%	9%	27%
Web 2.0 (e.g., wikis, blogs, social networking)	31%	14%	12%	12%	8%	24%
Web services/SaaS	30%	10%	15%	14%	6%	24%

TECHNOLOGY PRIORITIES SURVEY

Current Activity – Infrastructure Technologies	On Radar/ Actively Researching	Piloting	In Production in BU or Division	In Production Enterprise-Wide	Upgrading/ Refining	Not Interested
Cloud computing services	48%	9%	6%	6%	3%	28%
Enterprise architecture/SOA	32%	13%	8%	13%	5%	30%
Enterprise data management	32%	11%	12%	14%	9%	22%
Hardware infrastructure upgrades	19%	6%	8%	26%	23%	17%
Printing/output services	14%	4%	9%	26%	14%	34%
Unified communications	26%	12%	9%	17%	6%	29%
Virtualization, Desktop PC	29%	16%	11%	9%	7%	28%
Virtualization, Server	21%	12%	12%	27%	9%	18%
Virtualization, Storage	31%	13%	9%	16%	8%	22%

IT Organization's Plan for Green Initiatives	Percent
One or more programs in effect company-wide	38%
One or more programs in effect within IT	28%
We are starting to address the issue	25%
No plans for green initiatives	20%
Launching new initiatives in the next 12 months within IT	17%
Launching new initiatives in the next 12 months company-wide	17%

TECHNOLOGY PRIORITIES SURVEY

Percentage of IT Budget	Infrastructure, Operations, Support & Maintenance	New Development	Other
10% or less	2%	12%	64%
11% - 20%	4%	23%	18%
21% - 30%	8%	29%	11%
31% - 40%	14%	15%	3%
41% - 50%	15%	14%	2%
51% - 60%	17%	4%	1%
61% - 70%	14%	2%	0%
71% - 80%	18%	1%	1%
81% - 90%	7%	2%	0%
91% - 100%	1%	0%	0%
Average (mean)	57%	31%	12%

Primary Focus IT Investments Next 12 Months	Percent
Enable business process innovation	29%
Lower business operations costs	26%
Manage IT infrastructure more efficiently	23%
Create topline revenue growth	20%
Other, please specify	3%

Top IT Executive	Percent
Yes	53%
No	47%

TECHNOLOGY PRIORITIES SURVEY

Job Title	Percent
IT-Related (Net)	81%
CIO/CTO	29%
CSO/CISO	2%
Vice President/Senior VP/Executive VP	10%
Director/Manager/Supervisor	31%
Staff	11%
Non-IT Related (Net)	18%
CEO/President/Owner/Partner/COO/General Manager	8%
CFO/Treasurer/Controller	1%
Vice President/Senior VP/Executive VP	4%
Director/Manager/Supervisor	4%
Staff	2%

Annual Revenue	Percent
\$40 billion or more	8%
\$30 billion to \$39.9 billion	2%
\$15 billion to \$29.9 billion	4%
\$10 billion to \$14.9 billion	4%
\$5 billion to \$9.9 billion	6%
\$1 billion to \$4.9 billion	12%
\$100 million to \$999.9 million	25%
Less than \$100 million	24%
Not applicable (e.g., nonprofit, government, union)	9%
Not sure	8%

TECHNOLOGY PRIORITIES SURVEY

Industry	Percent
Advertising/Marketing/PR/Media (publishing, broadcast, online)	6%
Financial Services (banking, insurance, brokerage)	11%
Government and Nonprofits (including education)	13%
Healthcare (providers and pharmaceuticals)	8%
High Tech, Telecom & Utilities	19%
Manufacturing (including automotive, aerospace & defense, construction, engineering, chemical, metals & mining)	14%
Retail, Wholesale and Distribution	6%
Services (legal, consulting, real estate)	7%
Transportation (airlines, trucking, railroads, shipping, logistics)	4%
Travel and Leisure (cruiselines, hotels, theme parks, casinos)	2%
Other	11%

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