

# **Microsoft Communications Sector**

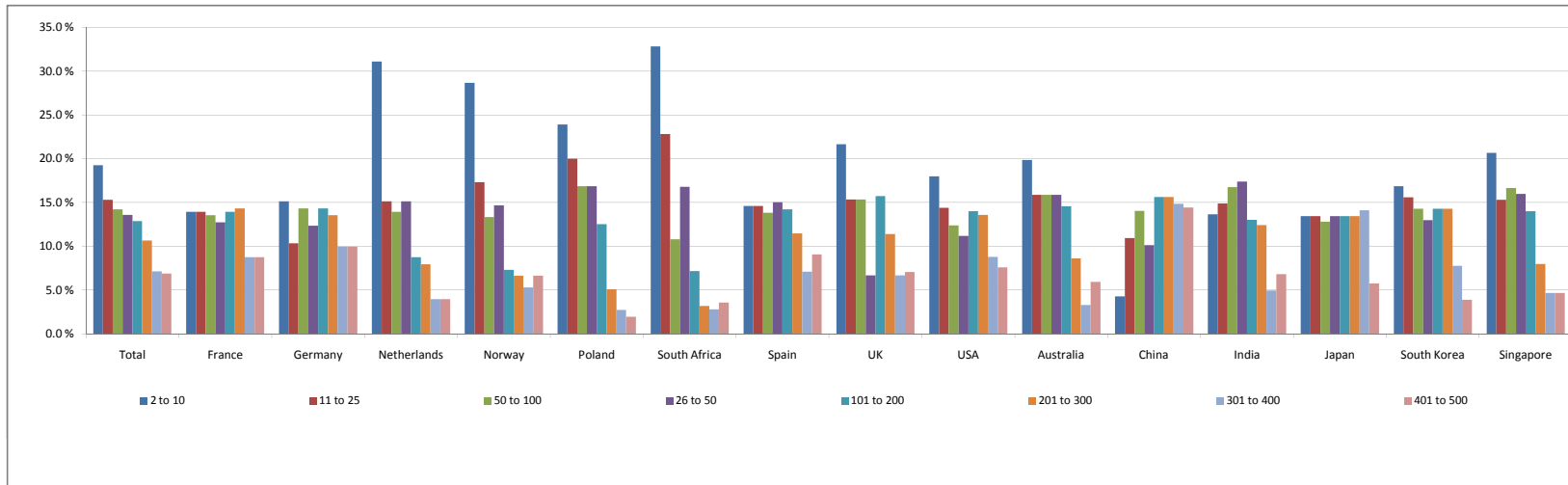
## **Report by Country**

- 1 [How many employees does your organisation have in total?](#)
- 2 [What type of business is your organisation?](#)
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- 4 [In the last year, has your organisation's revenue:](#)
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- 7 [Do you think professional IT tools \(such as professional website and company-branded email rather than Hotmail, or CRM tools\) are important in running your company and dealing with customers?](#)
- 8 [Do you think that bigger businesses gain an advantage from having more dedicated and sophisticated IT resources?](#)
- 9 [Regardless of cost, would your business be better if you had more IT \(mobile & 24/7communications, online tools\) available?](#)
- 10 [Where do you get IT support for your business?](#)
- 11 [Where do you primarily buy IT software \(such as email, mobile email/communications, software tools like CRM or Office\)? \(NB Not hardware\)](#)
- 12 [Which of the following IT tools do you have? Email](#)
- 13 [Which of the following IT tools do you have? File sharing/collaboration \(i.e. online, real time collaboration/editing tools, i.e. Sharepoint\)](#)
- 14 [Which of the following IT tools do you have? Backup](#)
- 15 [Which of the following IT tools do you have? Customer Relation Management \(CRM\)](#)
- 16 [Which of the following IT tools do you have? Webconferencing \(i.e. Online conference call tools Webex, LiveMeeting\)](#)
- 17 [Which of the following IT tools do you have? Website](#)
- 18 [Which of the following IT tools do you have? Server](#)
- 19 [Which of the following IT tools do you have? E-commerce \(Can people pay for goods/services on your website?\)](#)
- 20 [Which of the following IT tools do you not have?](#)
- 21 [Which of the following IT tools do you have onsite?](#)
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- 23 [Have you considered using hosted IT services for any of the following IT tools?](#)
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- 25 [Do you use hosted IT services?](#)
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- 27 [What interested you in hosted services?](#)
- 28 [Which of these factors have prevented the complete implementation of hosted services across your organisation?](#)
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- 33 [Do you currently use Cloud Computing?](#)
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- 36 [A business has many communications channels \(email, Instant Messenger, fixed phone, mobile phone, fax, mobile email\), would you benefit from a way to unify all these communications channels to make them easier to budget?](#)

How many employees does your organisation have in total?

Commentary

Base: Asked to all respondents	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
2 to 10	19.3 %	13.9 %	15.1 %	31.1 %	28.7 %	23.9 %	32.8 %	14.6 %	21.7 %	18.0 %	19.9 %	4.3 %	13.7 %	13.5 %	16.9 %	20.7 %
11 to 25	15.3 %	13.9 %	10.4 %	15.1 %	17.3 %	20.0 %	22.8 %	14.6 %	15.4 %	14.4 %	15.9 %	10.9 %	14.9 %	13.5 %	15.6 %	15.3 %
50 to 100	14.2 %	13.5 %	14.3 %	13.9 %	13.3 %	16.9 %	10.8 %	13.8 %	15.4 %	12.4 %	15.9 %	14.1 %	16.8 %	12.8 %	14.3 %	16.7 %
26 to 50	13.6 %	12.7 %	12.4 %	15.1 %	14.7 %	16.9 %	16.8 %	15.0 %	6.7 %	11.2 %	15.9 %	10.2 %	17.4 %	13.5 %	13.0 %	16.0 %
101 to 200	12.9 %	13.9 %	14.3 %	8.8 %	7.3 %	12.5 %	7.2 %	14.2 %	15.7 %	14.0 %	14.6 %	15.6 %	13.0 %	13.5 %	14.3 %	14.0 %
201 to 300	10.7 %	14.3 %	13.5 %	8.0 %	6.7 %	5.1 %	3.2 %	11.5 %	11.4 %	13.6 %	8.6 %	15.6 %	12.4 %	13.5 %	14.3 %	8.0 %
301 to 400	7.1 %	8.8 %	10.0 %	4.0 %	5.3 %	2.7 %	2.8 %	7.1 %	6.7 %	8.8 %	3.3 %	14.8 %	5.0 %	14.1 %	7.8 %	4.7 %
401 to 500	6.9 %	8.8 %	10.0 %	4.0 %	6.7 %	2.0 %	3.6 %	9.1 %	7.1 %	7.6 %	6.0 %	14.5 %	6.8 %	5.8 %	3.9 %	4.7 %
Base	3193	251	251	251	150	255	250	253	254	250	151	256	161	156	154	150

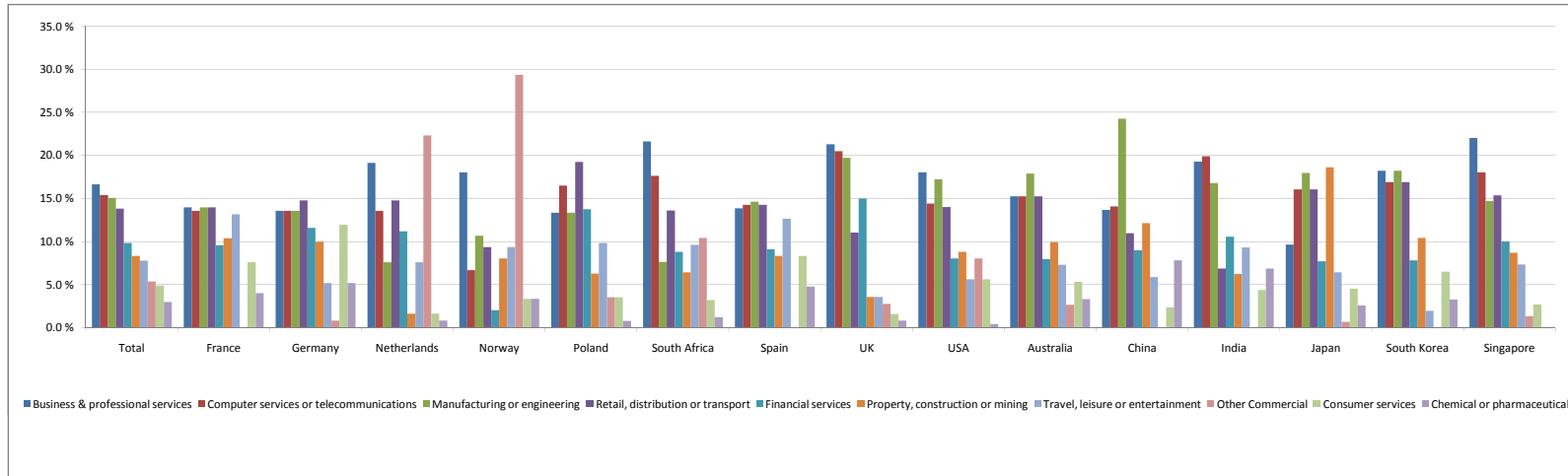


Base: Asked to all respondents	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
2 to 10	19.3 %	12.5 %	11.2 %	26.5 %	26.9 %	15.5 %	17.7 %	22.3 %	19.9 %	4.2 %	28.1 %
11 to 25	15.3 %	9.9 %	10.0 %	17.9 %	15.4 %	17.7 %	15.3 %	20.4 %	16.0 %	15.8 %	17.5 %
50-100	14.2 %	13.7 %	17.5 %	12.0 %	13.0 %	18.7 %	13.3 %	9.1 %	13.5 %	13.7 %	12.9 %
26 to 50	13.6 %	13.4 %	14.8 %	11.1 %	12.4 %	14.7 %	17.7 %	12.8 %	12.2 %	11.6 %	14.6 %
101-200	12.9 %	15.3 %	15.8 %	11.1 %	12.2 %	11.6 %	12.5 %	14.3 %	16.7 %	11.6 %	6.4 %
201-300	10.7 %	14.1 %	14.3 %	9.5 %	7.5 %	10.6 %	11.3 %	8.7 %	11.5 %	11.6 %	8.2 %
301-400	7.1 %	10.9 %	9.4 %	6.6 %	5.3 %	4.9 %	7.3 %	6.4 %	6.4 %	10.5 %	7.6 %
401-500	6.9 %	10.2 %	7.1 %	5.2 %	7.2 %	6.3 %	4.8 %	6.0 %	3.8 %	21.1 %	4.7 %
Base	3193	313	481	441	531	491	248	265	156	95	171

Base: Asked to all respondents	Total	EMEA	APAC	USA
2 to 10	19.3 %	22.4 %	13.7 %	18.0 %
11 to 25	15.3 %	16.1 %	14.0 %	14.4 %
50 to 100	13.6 %	13.7 %	13.9 %	11.2 %
26 to 50	14.2 %	14.0 %	15.0 %	12.4 %
101 to 200	12.9 %	12.0 %	14.3 %	14.0 %
201 to 300	10.7 %	9.3 %	12.5 %	13.6 %
301 to 400	7.1 %	6.0 %	8.9 %	8.8 %
401 to 500	6.9 %	6.4 %	7.7 %	7.6 %
Base	3193	1915	1028	250

What type of business is your organisation?

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
<b>Business &amp; professional services</b>	<b>16.6 %</b>	13.9 %	13.5 %	19.1 %	18.0 %	13.3 %	21.6 %	13.8 %	21.3 %	18.0 %	15.2 %	13.7 %	19.3 %	9.6 %	18.2 %	22.0 %
<b>Computer services or telecommunications</b>	<b>15.4 %</b>	13.5 %	13.5 %	13.5 %	6.7 %	16.5 %	17.6 %	14.2 %	20.5 %	14.4 %	15.2 %	14.1 %	19.9 %	16.0 %	16.9 %	18.0 %
<b>Manufacturing or engineering</b>	<b>15.1 %</b>	13.9 %	13.5 %	7.6 %	10.7 %	13.3 %	7.6 %	14.6 %	19.7 %	17.2 %	17.9 %	24.2 %	16.8 %	17.9 %	18.2 %	14.7 %
<b>Retail, distribution or transport</b>	<b>13.8 %</b>	13.9 %	14.7 %	14.7 %	9.3 %	19.2 %	13.6 %	14.2 %	11.0 %	14.0 %	15.2 %	10.9 %	6.8 %	16.0 %	16.9 %	15.3 %
<b>Financial services</b>	<b>9.8 %</b>	9.6 %	11.6 %	11.2 %	2.0 %	13.7 %	8.8 %	9.1 %	15.0 %	8.0 %	7.9 %	9.0 %	10.6 %	7.7 %	7.8 %	10.0 %
<b>Property, construction or mining</b>	<b>8.3 %</b>	10.4 %	10.0 %	1.6 %	8.0 %	6.3 %	6.4 %	8.3 %	3.5 %	8.8 %	9.9 %	12.1 %	6.2 %	18.6 %	10.4 %	8.7 %
<b>Travel, leisure or entertainment</b>	<b>7.8 %</b>	13.1 %	5.2 %	7.6 %	9.3 %	9.8 %	9.6 %	12.6 %	3.5 %	5.6 %	7.3 %	5.9 %	9.3 %	6.4 %	1.9 %	7.3 %
<b>Other Commercial</b>	<b>5.4 %</b>	0.0 %	0.8 %	22.3 %	29.3 %	3.5 %	10.4 %	0.0 %	2.8 %	8.0 %	2.6 %	0.0 %	0.0 %	0.6 %	0.0 %	1.3 %
<b>Consumer services</b>	<b>4.9 %</b>	7.6 %	12.0 %	1.6 %	3.3 %	3.5 %	3.2 %	8.3 %	1.6 %	5.6 %	5.3 %	2.3 %	4.3 %	4.5 %	6.5 %	2.7 %
<b>Chemical or pharmaceutical</b>	<b>3.0 %</b>	4.0 %	5.2 %	0.8 %	3.3 %	0.8 %	1.2 %	4.7 %	0.8 %	0.4 %	3.3 %	7.8 %	6.8 %	2.6 %	3.2 %	0.0 %



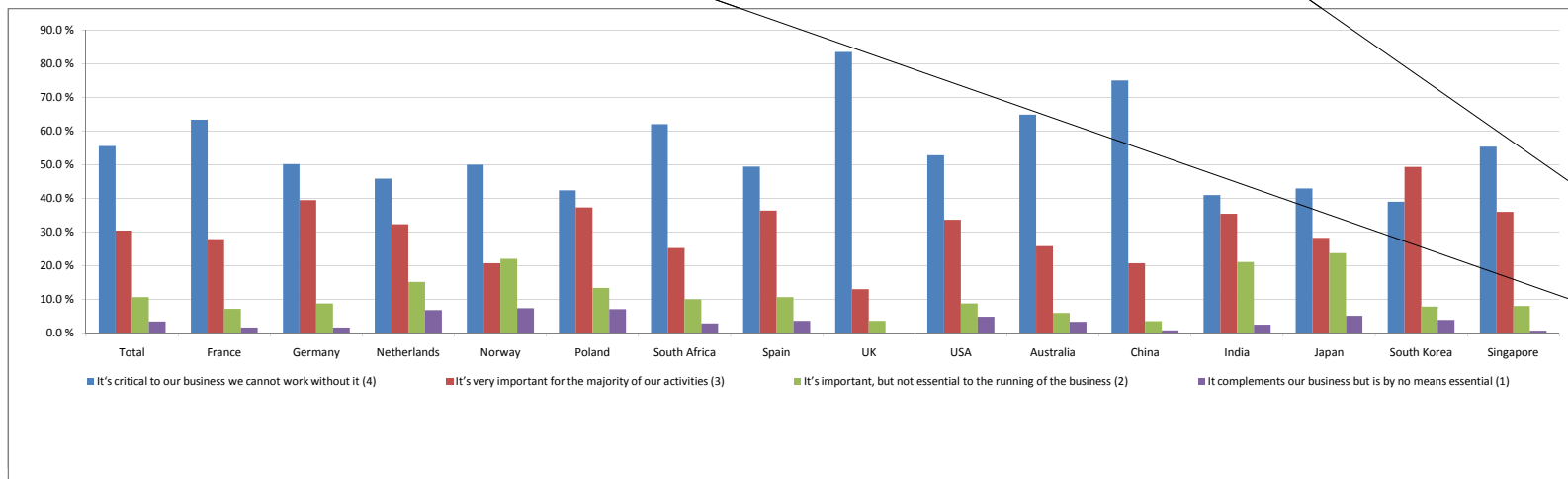
	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
<b>Business &amp; professional services</b>	<b>16.6 %</b>	23.3 %	16.8 %	15.2 %	15.2 %	15.8 %	11.7 %	12.3 %	17.3 %
<b>Computer services or telecommunications</b>	<b>15.4 %</b>	12.4 %	17.8 %	16.6 %	20.3 %	13.8 %	15.2 %	10.5 %	14.1 %
<b>Manufacturing or engineering</b>	<b>15.1 %</b>	8.8 %	9.8 %	16.4 %	18.5 %	18.4 %	20.2 %	19.7 %	15.5 %
<b>Retail, distribution or transport</b>	<b>13.8 %</b>	19.0 %	16.2 %	11.3 %	11.7 %	11.9 %	12.3 %	12.7 %	10.5 %
<b>Financial services</b>	<b>9.8 %</b>	6.3 %	6.3 %	9.7 %	9.5 %	11.7 %	12.9 %	14.9 %	14.5 %
<b>Property, construction or mining</b>	<b>8.3 %</b>	9.6 %	11.0 %	7.8 %	5.3 %	9.2 %	6.7 %	7.5 %	7.3 %
<b>Travel, leisure or entertainment</b>	<b>7.8 %</b>	7.2 %	7.8 %	10.1 %	7.3 %	7.5 %	8.2 %	7.9 %	5.5 %
<b>Consumer services</b>	<b>4.9 %</b>	5.0 %	5.1 %	4.4 %	4.6 %	6.3 %	5.3 %	4.4 %	2.7 %
<b>Chemical or pharmaceutical</b>	<b>3.0 %</b>	0.7 %	3.1 %	2.5 %	2.9 %	2.7 %	3.2 %	4.4 %	9.1 %
<b>Other Commercial</b>	<b>5.4 %</b>	7.8 %	6.1 %	5.8 %	4.8 %	2.7 %	4.1 %	5.7 %	3.6 %

	Total	EMEA	APAC	USA
<b>Business &amp; professional services</b>	<b>16.6 %</b>	16.8 %	16.1 %	18.0 %
<b>Computer services or telecommunications</b>	<b>15.4 %</b>	14.9 %	16.4 %	14.4 %
<b>Manufacturing or engineering</b>	<b>15.1 %</b>	12.7 %	18.9 %	17.2 %
<b>Retail, distribution or transport</b>	<b>13.8 %</b>	14.1 %	13.2 %	14.0 %
<b>Financial services</b>	<b>9.8 %</b>	10.5 %	8.9 %	8.0 %
<b>Property, construction or mining</b>	<b>8.3 %</b>	6.7 %	11.1 %	8.8 %
<b>Travel, leisure or entertainment</b>	<b>7.8 %</b>	8.8 %	6.3 %	5.6 %
<b>Other Commercial</b>	<b>5.4 %</b>	7.5 %	0.7 %	8.0 %
<b>Consumer services</b>	<b>4.9 %</b>	5.2 %	4.1 %	5.6 %
<b>Chemical or pharmaceutical</b>	<b>3.0 %</b>	2.6 %	4.4 %	0.4 %

Commentary

How important is IT to the day to day running of your business?

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
It's critical to our business we cannot work without it (4)	55.5 %	63.3 %	50.2 %	45.8 %	50.0 %	42.4 %	62.0 %	49.4 %	83.5 %	92.8 %	64.9 %	75.0 %	41.0 %	42.9 %	39.0 %	55.3 %
It's very important for the majority of our activities (3)	30.4 %	27.9 %	39.4 %	32.3 %	20.7 %	37.3 %	25.2 %	36.4 %	13.0 %	33.6 %	25.8 %	20.7 %	35.4 %	28.2 %	49.4 %	36.0 %
It's important, but not essential to the running of the business (2)	10.7 %	7.2 %	8.8 %	15.1 %	22.0 %	13.3 %	10.0 %	10.7 %	3.5 %	8.8 %	6.0 %	3.5 %	21.1 %	23.7 %	7.8 %	8.0 %
It complements our business but is by no means essential (1)	3.4 %	1.6 %	1.6 %	6.8 %	7.3 %	7.1 %	2.8 %	3.6 %	0.0 %	4.8 %	3.3 %	0.8 %	2.5 %	5.1 %	3.9 %	0.7 %
Average	3.4	3.5	3.4	3.2	3.1	3.1	3.5	3.3	3.8	3.3	3.5	3.7	3.1	3.1	3.2	3.5
Summary of 4 and 3	85.9 %	91.2 %	89.6 %	78.1 %	70.7 %	79.6 %	87.2 %	85.8 %	96.5 %	86.4 %	90.7 %	95.7 %	76.4 %	71.2 %	88.3 %	91.3 %



Commentary

The organisations interviewed for the survey across the Globe exhibit a very high reliance on IT to help the day to day running of their business with 86% saying that technology is either very important or critical to their business. How far this is a result of the survey being conducted online we can't say, nevertheless there is clear evidence from the research, that for these organisations at least, technology is extremely important to the Small Business community.

Norway and Japan at 71% have the lowest percentage of heavily IT-reliant organisations while the UK and China have the highest at 97% and 96% respectively.

More than half of respondents reported that IT is critical to the day to day running of business, and this proportion is 20% greater in UK and China.

The nations most likely to report that IT complements business but is not essential, are the Netherlands, Norway and Poland. However, the proportion of respondents in these nations to do so, is still less than 10%.

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
It's critical to our business we cannot work without it (4)	55.5 %	65.2 %	55.5 %	46.0 %	57.4 %	74.1 %	48.0 %	46.8 %	42.9 %	55.8 %	38.6 %
It's very important for the majority of our activities (3)	30.4 %	25.6 %	30.8 %	37.2 %	32.8 %	20.2 %	31.0 %	34.3 %	41.0 %	29.5 %	26.9 %
It's important, but not essential to the running of the business (2)	10.7 %	8.0 %	11.6 %	11.8 %	7.7 %	4.9 %	15.7 %	12.5 %	12.8 %	11.6 %	23.4 %
It complements our business but is by no means essential (1)	3.4 %	1.3 %	2.1 %	5.0 %	2.1 %	0.8 %	5.2 %	6.4 %	3.2 %	3.2 %	11.1 %
Average	3.4	3.5	3.4	3.2	3.5	3.7	3.2	3.2	3.2	3.4	2.9
Summary of 4 and 3	85.9 %	90.7 %	86.3 %	83.2 %	90.2 %	94.3 %	79.0 %	81.1 %	84.0 %	85.3 %	65.5 %

Respondents in computer services or telecoms, and financial services are most likely to report that IT is critical to their business.

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
It's critical to our business we cannot work without it (4)	55.5 %	47.8 %	53.4 %	50.5 %	58.4 %	58.3 %	62.2 %	58.8 %	67.3 %
It's very important for the majority of our activities (3)	30.4 %	29.9 %	29.7 %	35.5 %	31.1 %	30.6 %	28.7 %	32.9 %	21.8 %
It's important, but not essential to the running of the business (2)	10.7 %	14.3 %	14.5 %	11.1 %	8.6 %	10.0 %	7.0 %	5.7 %	7.7 %
It complements our business but is by no means essential (1)	3.4 %	8.0 %	2.5 %	3.0 %	2.0 %	1.2 %	2.1 %	2.6 %	3.2 %
Average	3.4	3.2	3.3	3.3	3.5	3.5	3.5	3.5	3.5
Summary of 4 and 3	85.9 %	77.7 %	83.0 %	85.9 %	89.4 %	88.8 %	90.9 %	91.7 %	89.1 %

Respondents working in larger organisations are more likely to report that IT is critical.

	Total	EMEA	APAC	USA
It's critical to our business we cannot work without it (4)	55.5 %	56.1 %	55.1 %	52.8 %
It's very important for the majority of our activities (3)	30.4 %	29.5 %	31.4 %	33.6 %
It's important, but not essential to the running of the business (2)	10.7 %	10.8 %	11.0 %	8.8 %
It complements our business but is by no means essential (1)	3.4 %	3.7 %	2.5 %	4.8 %
Average	3.4	3.4	3.4	3.3
Summary of 4 and 3	85.9 %	85.6 %	86.5 %	86.4 %

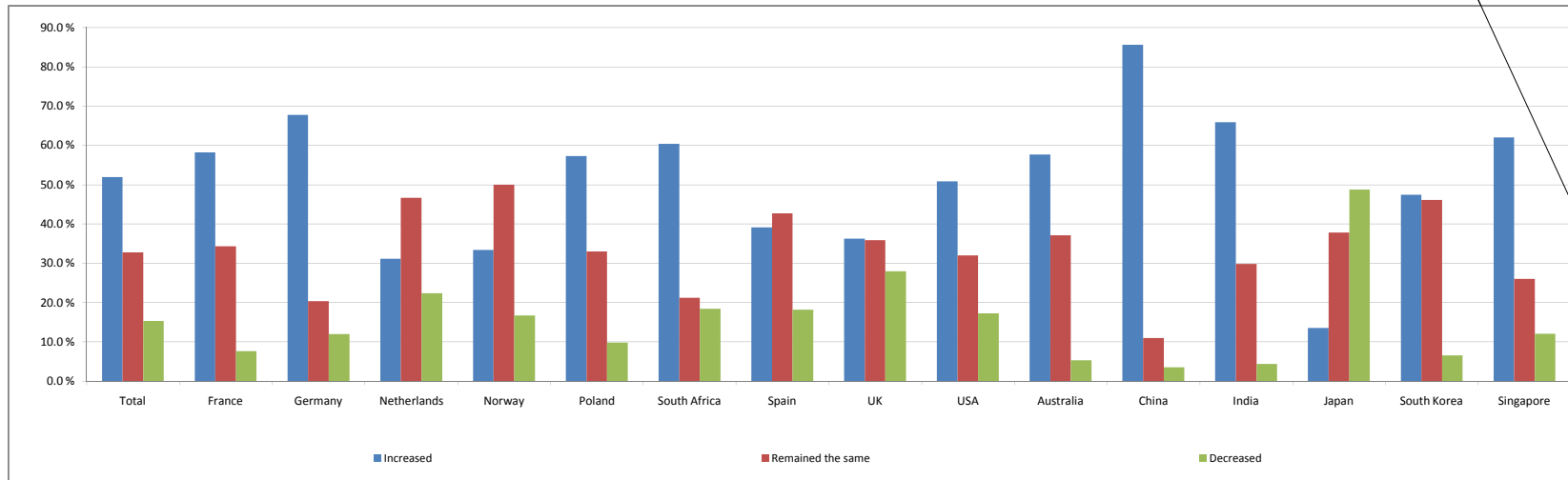
The region where IT is most often reported as being critical is EMEA.

In the last year, has your organisation's revenue:

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Increased	51.9 %	58.2 %	67.7 %	31.1 %	33.3 %	57.3 %	60.4 %	39.1 %	36.2 %	50.8 %	57.6 %	85.5 %	65.8 %	13.5 %	47.4 %	62.0 %
Remained the same	32.8 %	34.3 %	20.3 %	46.6 %	50.0 %	32.9 %	21.2 %	42.7 %	35.8 %	32.0 %	37.1 %	10.9 %	29.8 %	37.8 %	46.1 %	26.0 %
Decreased	15.3 %	7.6 %	12.0 %	22.3 %	16.7 %	9.8 %	18.4 %	18.2 %	28.0 %	17.2 %	5.3 %	3.5 %	4.3 %	48.7 %	6.5 %	12.0 %

Commentary

Just over half of these IT-reliant organisations saw their revenues increase in the last year with around one in seven suggesting their revenues had decreased. Greater examination of variance by country, region, size and sector is given below.



The countries where organisations are most likely to have increased revenues in the last year are China, India and Germany. Meanwhile, Japan is the country where the smallest proportion of organisations reported an increased revenue and almost half reported decreased revenues, followed by the UK where over a quarter reported decreased revenues.

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Increased	51.9 %	64.5 %	50.1 %	50.6 %	52.0 %	55.0 %	51.2 %	47.5 %	42.9 %	74.7 %	32.2 %
Remained the same	32.8 %	25.2 %	31.8 %	33.1 %	31.8 %	29.7 %	36.7 %	34.0 %	39.7 %	17.9 %	53.8 %
Decreased	15.3 %	10.2 %	18.1 %	16.3 %	16.2 %	15.3 %	12.1 %	18.5 %	17.3 %	7.4 %	14.0 %

The largest proportions of respondents to report an increased revenue, work in the chemical or pharmaceutical sector, and in financial services. In contrast, almost a fifth of respondents in the property, construction or mining sector reported a decreased revenue.

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Increased	51.9 %	39.8 %	51.7 %	51.8 %	50.9 %	55.8 %	56.9 %	58.3 %	66.8 %
Remained the same	32.8 %	39.2 %	34.8 %	33.6 %	31.9 %	28.9 %	29.3 %	31.1 %	24.5 %
Decreased	15.3 %	21.0 %	13.5 %	14.5 %	17.2 %	15.3 %	13.8 %	10.5 %	8.6 %

The highest proportion of respondents to report an increased revenue were in the largest of the organisations. Alternatively, the lowest proportion to do so, and the highest to report a decreased revenue were in the smallest of organisations.

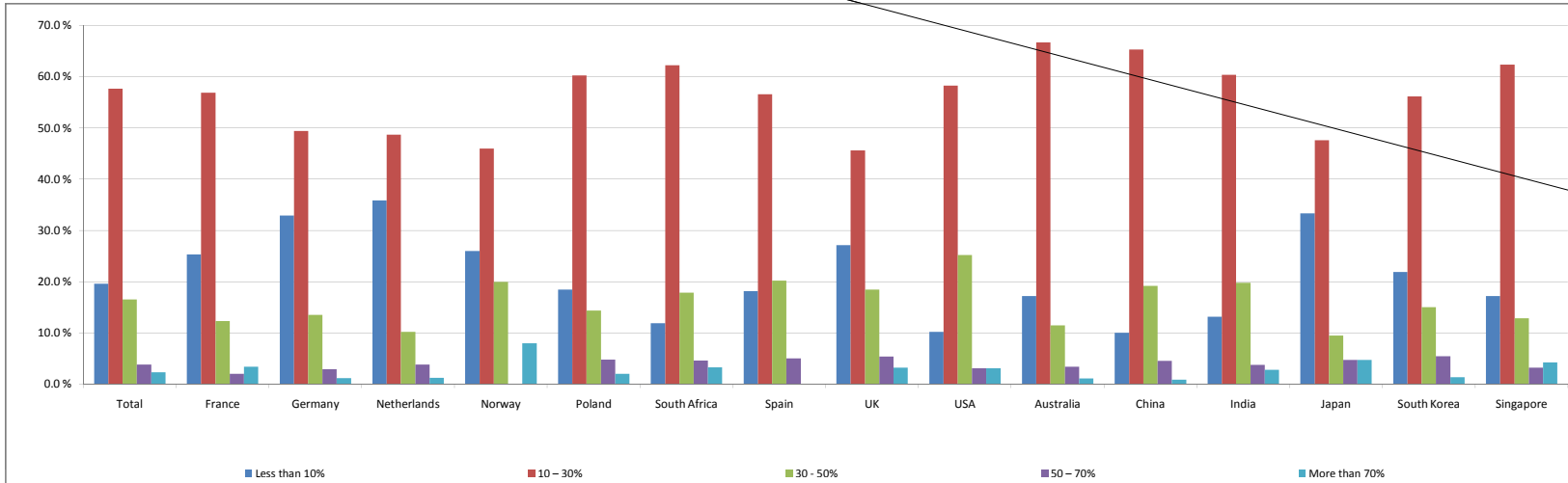
	Total	EMEA	APAC	USA
Increased	51.9 %	48.7 %	58.3 %	50.8 %
Remained the same	32.8 %	34.7 %	29.3 %	32.0 %
Decreased	15.3 %	16.6 %	12.5 %	17.2 %

Respondents in the APAC region are most likely to report an increased revenue (even with Japan's incidence of decreased revenues). USA however is the region where the largest proportion of decreased revenues was reported.

By how much, has your organisation's revenue increased?

Base: Only answered by respondents who answered that their organisation's revenue had increased

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Less than 10%	19.6 %	25.3 %	32.9 %	35.9 %	26.0 %	18.5 %	11.9 %	18.2 %	27.2 %	10.2 %	17.2 %	10.0 %	13.2 %	33.3 %	21.9 %	17.2 %
10 - 30%	57.7 %	56.8 %	49.4 %	48.7 %	46.0 %	60.3 %	62.3 %	56.6 %	45.7 %	58.9 %	66.7 %	65.3 %	60.4 %	47.6 %	56.2 %	62.4 %
30 - 50%	16.5 %	12.3 %	13.5 %	10.3 %	20.0 %	14.4 %	17.9 %	20.2 %	18.5 %	25.2 %	11.5 %	19.2 %	19.8 %	9.5 %	15.1 %	12.9 %
50 - 70%	3.9 %	2.1 %	2.9 %	3.8 %	0.0 %	4.8 %	4.6 %	5.1 %	5.4 %	3.1 %	3.4 %	4.6 %	3.8 %	4.8 %	5.5 %	3.2 %
More than 70%	2.4 %	3.4 %	1.2 %	1.3 %	8.0 %	2.1 %	3.3 %	0.0 %	3.3 %	2.1 %	1.1 %	0.9 %	2.8 %	4.8 %	1.4 %	4.3 %
Base	1658	146	170	78	50	146	151	99	92	127	87	219	106	21	73	93



**Commentary**

Over 90% of the respondents to report an increased revenue, reported it to be by less than 50%. This is consistent across all the countries, the three regions, the various sizes and all the sectors apart from chemical and pharmaceutical where the proportion is 86%.

This suggests that, as we might have anticipated, the average increase is not huge for these organisations but does perhaps suggest that for an appreciable percentage of small and medium companies, the last 12 months have not been a total disaster. Given the high proportion of IT-reliant companies in the sample, it will be interesting to examine the role IT has played in giving us such an optimistic picture.

The largest proportion of respondents to report an increase of more than 70% were in Norway.

Base: Only answered by respondents who answered that their organisation's revenue had increased

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Less than 10%	19.6 %	19.3 %	15.4 %	23.3 %	18.1 %	17.8 %	22.0 %	19.8 %	17.9 %	18.3 %	38.2 %
10 - 30%	57.7 %	54.5 %	65.1 %	56.5 %	62.3 %	55.9 %	55.9 %	52.4 %	59.7 %	57.7 %	40.0 %
30 - 50%	16.5 %	19.3 %	15.4 %	15.2 %	13.8 %	19.3 %	16.5 %	21.4 %	14.9 %	9.9 %	16.4 %
50 - 70%	3.9 %	3.5 %	2.1 %	4.0 %	3.3 %	4.1 %	4.7 %	4.0 %	4.5 %	9.9 %	3.6 %
More than 70%	2.4 %	3.5 %	2.1 %	0.9 %	2.5 %	3.0 %	0.8 %	2.4 %	3.0 %	4.2 %	1.8 %
Base	1658	202	241	223	276	270	127	126	67	71	55

Base: Only answered by respondents who answered that their organisation's revenue had increased

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Less than 10%	19.6 %	22.4 %	22.9 %	20.4 %	19.5 %	21.3 %	15.5 %	14.3 %	15.6 %
10 - 30%	57.7 %	56.7 %	58.9 %	58.2 %	61.9 %	57.0 %	56.7 %	58.6 %	51.0 %
30 - 50%	16.5 %	14.3 %	11.9 %	14.7 %	12.1 %	17.0 %	23.7 %	21.1 %	23.8 %
50 - 70%	3.9 %	3.3 %	4.0 %	4.4 %	4.8 %	3.9 %	1.0 %	3.8 %	6.1 %
More than 70%	2.4 %	3.3 %	2.4 %	2.2 %	1.7 %	3.1 %	3.1 %	2.3 %	3.4 %
Base	1658	245	253	225	231	230	194	133	147

Base: Only answered by respondents who answered that their organisation's revenue had increased

	Total	EMEA	APAC	USA
Less than 10%	19.6 %	23.8 %	15.0 %	10.2 %
10 - 30%	57.7 %	54.5 %	62.4 %	58.3 %
30 - 50%	16.5 %	15.5 %	16.4 %	25.2 %
50 - 70%	3.9 %	3.8 %	4.2 %	3.1 %
More than 70%	2.4 %	2.5 %	2.0 %	3.1 %
Base	1658	932	599	127

By how much, has your organisation's revenue decreased?

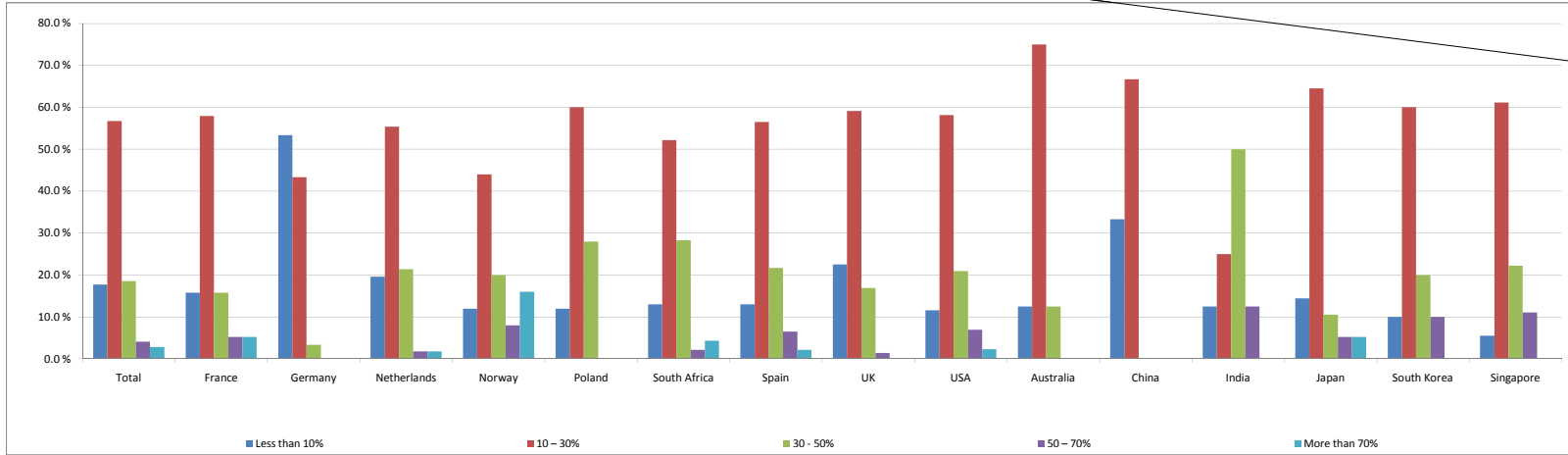
Base: Only answered by respondents who answered that their organisation's revenue had decreased

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Less than 10%	17.8%	15.8%	53.3%	19.6%	12.0%	12.0%	13.0%	13.0%	22.5%	11.6%	12.5%	33.3%	12.5%	14.5%	10.0%	5.6%
10 - 30%	56.7%	57.9%	43.3%	55.4%	44.0%	60.0%	52.2%	56.5%	59.2%	58.1%	75.0%	66.7%	25.0%	64.5%	60.0%	61.1%
30 - 50%	18.6%	15.8%	3.3%	21.4%	20.0%	28.0%	23.3%	28.3%	21.7%	20.9%	12.5%	0.0%	50.0%	10.5%	20.0%	22.2%
50 - 70%	4.1%	5.3%	0.0%	1.8%	8.0%	0.0%	2.2%	6.5%	1.4%	7.0%	0.0%	0.0%	12.5%	5.3%	10.0%	11.1%
More than 70%	2.9%	5.3%	0.0%	1.8%	16.0%	6.0%	4.3%	2.2%	0.0%	2.3%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%
Base	490	19	30	56	25	25	46	46	71	43	8	9	8	76	10	18

Commentary

Similarly to the reports of increased revenues (previous sheet), over 90% of the respondents reported their decrease to be by less than 70%.

Also, the highest proportion of respondents to report a decrease of over 70% were in Norway - indicating a large disparity in the current fortunes of organisations in this country.



Base: Only answered by respondents who answered that their organisation's revenue had decreased

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Less than 10%	17.8%	15.6%	12.6%	26.4%	15.1%	12.0%	16.7%	20.0%	18.5%	42.9%	29.2%
10 - 30%	56.7%	62.5%	57.5%	50.0%	58.1%	64.0%	60.0%	46.0%	63.0%	42.9%	54.2%
30 - 50%	18.6%	12.5%	23.0%	20.8%	17.4%	20.0%	20.0%	18.0%	14.8%	0.0%	12.5%
50 - 70%	4.1%	3.1%	4.6%	1.4%	5.8%	1.3%	3.3%	10.0%	3.7%	14.3%	0.0%
More than 70%	2.9%	6.3%	2.3%	1.4%	3.5%	2.7%	0.0%	6.0%	0.0%	0.0%	4.2%
Base	490	32	87	72	86	75	30	50	27	7	24

Base: Only answered by respondents who answered that their organisation's revenue had decreased

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Less than 10%	17.8%	11.6%	18.2%	20.8%	11.5%	25.4%	22.9%	20.8%	31.6%
10 - 30%	56.7%	58.1%	63.6%	46.0%	60.3%	61.9%	50.0%	58.3%	42.1%
30 - 50%	18.6%	22.5%	13.8%	25.4%	17.9%	7.9%	22.9%	16.7%	15.8%
50 - 70%	4.1%	3.9%	3.0%	6.3%	6.4%	1.6%	2.1%	4.2%	5.3%
More than 70%	2.9%	3.9%	1.5%	1.6%	3.8%	3.2%	2.1%	0.0%	5.3%
Base	490	129	66	63	78	63	48	24	19

Base: Only answered by respondents who answered that their organisation's revenue had decreased

	Total	EMEA	APAC	USA
Less than 10%	17.8%	20.1%	14.0%	11.6%
10 - 30%	56.7%	54.4%	62.0%	58.1%
30 - 50%	18.6%	19.8%	14.7%	20.9%
50 - 70%	4.1%	2.8%	6.2%	7.0%
More than 70%	2.9%	2.8%	3.1%	2.3%
Base	490	318	129	43

Do you think professional IT tools (such as professional website and company-branded email rather than Hotmail, or CRM tools) are important in running your company and dealing with customers?

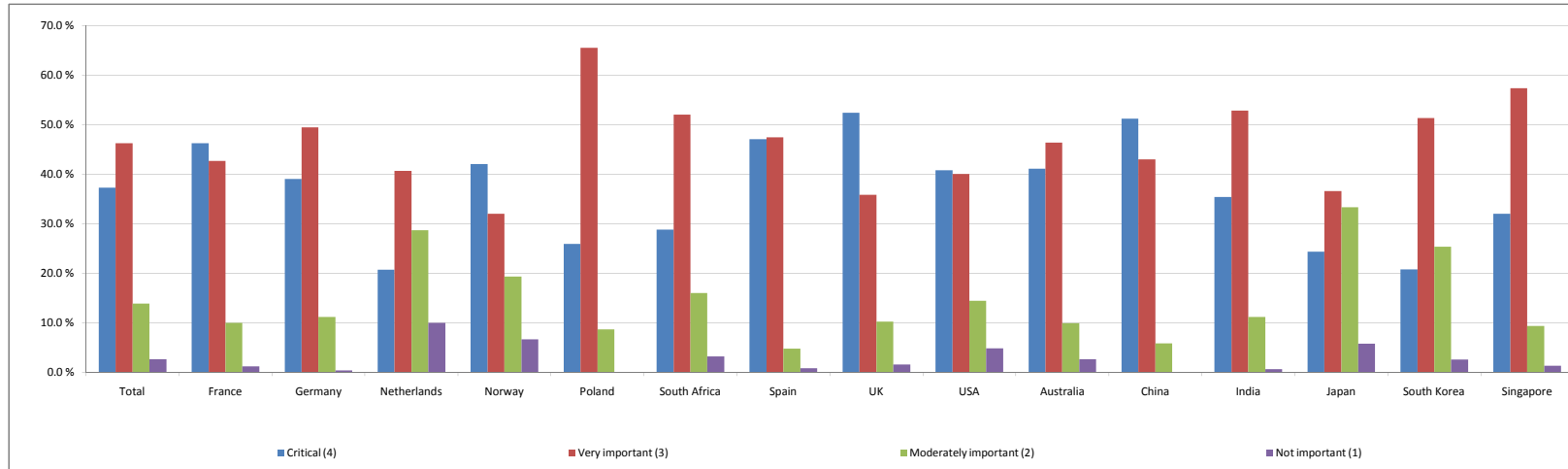
Commentary

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Critical (4)	37.2 %	46.2 %	39.0 %	20.7 %	42.0 %	25.9 %	28.8 %	47.0 %	52.4 %	40.8 %	41.1 %	51.2 %	35.4 %	24.4 %	20.8 %	32.0 %
Very important (3)	46.2 %	42.6 %	49.4 %	40.6 %	32.0 %	65.5 %	52.0 %	47.4 %	35.8 %	40.0 %	46.4 %	43.0 %	52.8 %	36.5 %	51.3 %	57.3 %
Moderately important (2)	13.9 %	10.0 %	11.2 %	28.7 %	19.3 %	8.6 %	16.0 %	4.7 %	10.2 %	14.4 %	9.9 %	5.9 %	11.2 %	33.3 %	25.3 %	9.3 %
Not important (1)	2.7 %	1.2 %	0.4 %	10.0 %	6.7 %	0.0 %	3.2 %	0.8 %	1.6 %	4.8 %	2.6 %	0.0 %	0.6 %	5.8 %	2.6 %	1.3 %
Average	3.2	3.3	3.3	2.7	3.1	3.2	3.1	3.4	3.4	3.2	3.3	3.5	3.2	2.8	2.9	3.2

Overall, less than four in ten respondents think that professional IT tools are critical, whereas more than half of the respondents in the UK and China reported this.

Conversely, only around one fifth of respondents in the Netherlands and South Africa reported this view.

From looking at the importance averages, three nations believe professional IT tools to be slightly less than very important (3), being the Netherlands, Japan and South Korea. But this is only a comparative score and even for those three countries, taking each score in isolation suggests a very high understanding of the role professional IT tools can play in the successful running of the Small organisation. This of course, is even more so in the other 12 countries under research.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Critical (4)	37.2 %	45.7 %	31.8 %	31.5 %	42.2 %	45.6 %	35.5 %	32.5 %	34.6 %	44.2 %	20.5 %
Very important (3)	46.2 %	43.8 %	52.2 %	47.8 %	44.1 %	45.4 %	50.4 %	46.0 %	44.9 %	45.3 %	35.1 %
Moderately important (2)	13.9 %	8.6 %	14.1 %	17.7 %	10.9 %	7.7 %	12.1 %	17.7 %	17.9 %	10.5 %	34.5 %
Not important (1)	2.7 %	1.9 %	1.9 %	2.9 %	2.8 %	1.2 %	2.0 %	3.8 %	2.6 %	0.0 %	9.9 %
Average	3.2	3.3	3.1	3.1	3.3	3.4	3.2	3.1	3.1	3.3	2.7

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Critical (4)	37.2 %	28.1 %	35.0 %	33.9 %	39.4 %	44.7 %	35.8 %	46.1 %	49.1 %
Very important (3)	46.2 %	43.4 %	45.6 %	50.9 %	47.8 %	45.1 %	52.8 %	43.0 %	38.2 %
Moderately important (2)	13.9 %	22.3 %	17.0 %	14.1 %	9.5 %	8.5 %	10.3 %	9.6 %	12.3 %
Not important (1)	2.7 %	6.2 %	2.5 %	1.2 %	3.3 %	1.7 %	1.2 %	1.3 %	0.5 %
Average	3.2	2.9	3.1	3.2	3.2	3.3	3.2	3.3	3.4

	Total	EMEA	APAC	USA
Critical (4)	37.2 %	37.5 %	35.8 %	40.8 %
Very important (3)	46.2 %	46.4 %	47.4 %	40.0 %
Moderately important (2)	13.9 %	13.3 %	14.9 %	14.4 %
Not important (1)	2.7 %	2.8 %	1.9 %	4.8 %
Average	3.2	3.2	3.2	3.2
Base	3193	1915	1028	250

Do you think that bigger businesses gain an advantage from having more dedicated and sophisticated IT resources?

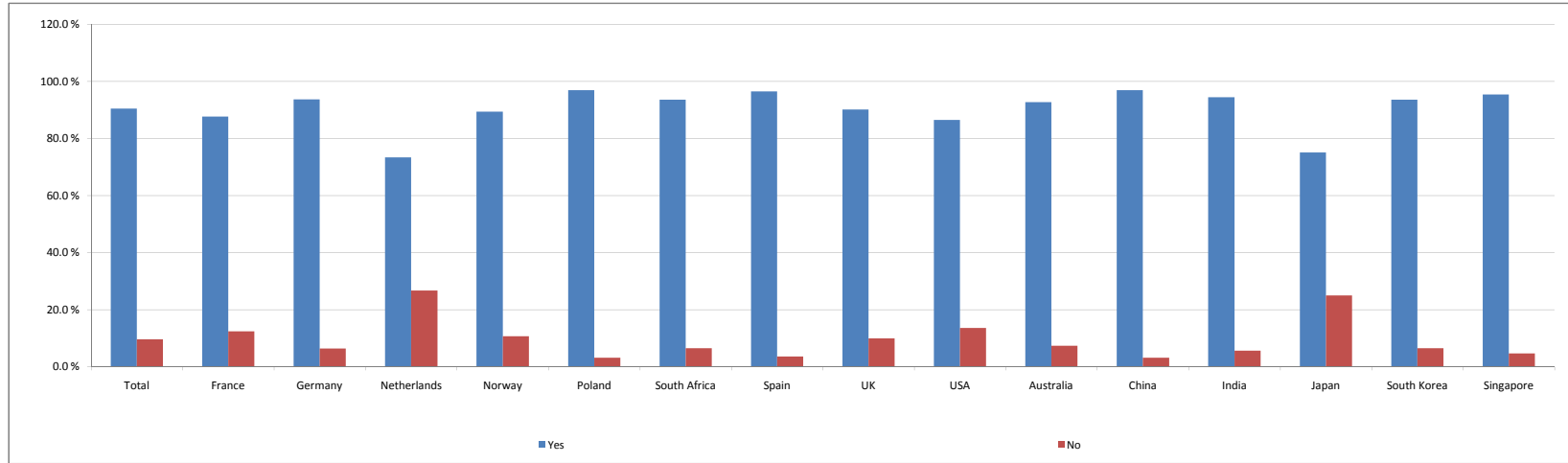
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	90.4 %	87.6 %	93.6 %	73.3 %	89.3 %	96.9 %	93.6 %	96.4 %	90.2 %	86.4 %	92.7 %	96.9 %	94.4 %	75.0 %	93.5 %	95.3 %
No	9.6 %	12.4 %	6.4 %	26.7 %	10.7 %	3.1 %	6.4 %	3.6 %	9.8 %	13.6 %	7.3 %	3.1 %	5.6 %	25.0 %	6.5 %	4.7 %

Commentary

Overall, at least 9 in 10 respondents reported that larger companies had an advantage of their smaller competitors because of their dedicated and sophisticated IT resources. Which gives us the obvious viewpoint that if such dedicated resources were available to the smallest organisations, then this differentiator would be eroded.

On a country variation, and this might be anticipated given what we have seen earlier, in Japan and the Netherlands this belief was only reported by around three quarters of the respondents.

One other variation to note, and again not unexpected, is that broadly the larger the company the greater the likelihood that this view is held.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	90.4 %	93.3 %	92.1 %	89.8 %	88.3 %	91.2 %	91.9 %	92.5 %	87.2 %	95.8 %	80.7 %
No	9.6 %	6.7 %	7.9 %	10.2 %	11.7 %	8.8 %	8.1 %	7.5 %	12.8 %	4.2 %	19.3 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Yes	90.4 %	84.6 %	91.4 %	89.4 %	92.1 %	91.3 %	91.8 %	93.9 %	95.9 %
No	9.6 %	15.4 %	8.6 %	10.6 %	7.9 %	8.7 %	8.2 %	6.1 %	4.1 %

	Total	EMEA	APAC	USA
Yes	90.4 %	90.2 %	91.8 %	86.4 %
No	9.6 %	9.8 %	8.2 %	13.6 %

Regardless of cost, would your business be better if you had more IT (mobile & 24/7 communications, online tools) available?

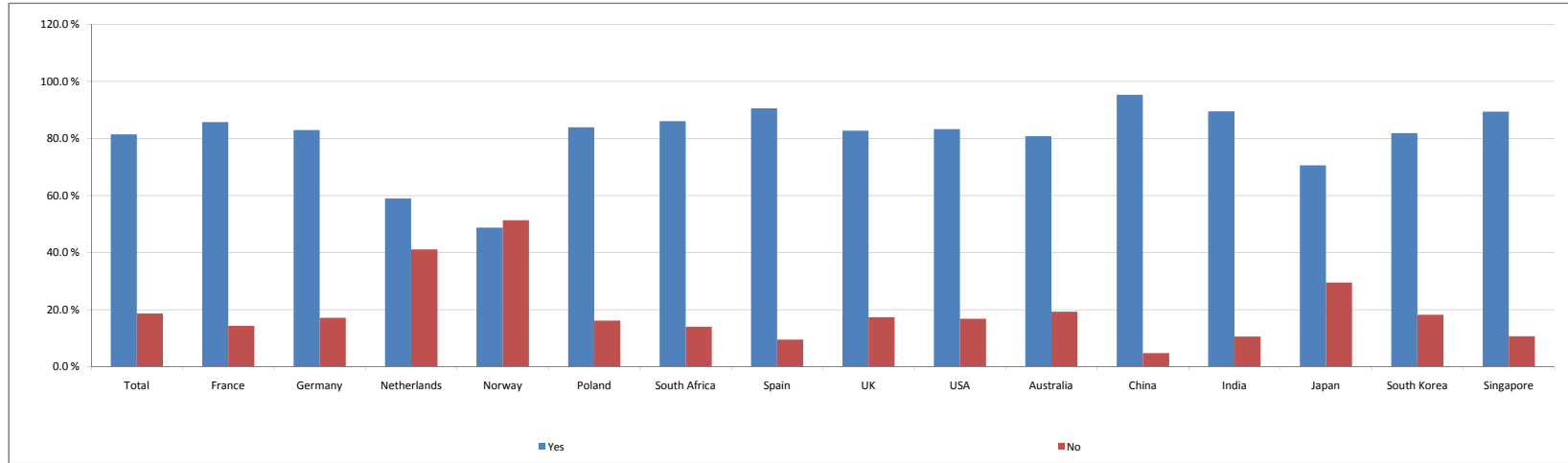
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	81.4 %	85.7 %	82.9 %	59.0 %	48.7 %	83.9 %	86.0 %	90.5 %	82.7 %	83.2 %	80.8 %	95.3 %	89.4 %	70.5 %	81.8 %	89.3 %
No	18.6 %	14.3 %	17.1 %	41.0 %	51.3 %	16.1 %	14.0 %	9.5 %	17.3 %	16.8 %	19.2 %	4.7 %	10.6 %	29.5 %	18.2 %	10.7 %

Commentary

Overall, around four-fifths of respondents thought their business would be better off if they had more IT available.

However, only around three-fifths thought this in Netherlands, and seven-tenths in Japan - where results have previously shown respondents demonstrating that they attach slightly less importance to IT than the other countries.

Norway was the only nation where more respondents answered "no" than "yes", which is somewhat surprising given their previous answers which suggest that they consider IT to be important and advantageous. We might suggest that the reason a majority of Norwegian respondents disagreed with this question could be because they are already fully 'tooled-up'.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	81.4 %	85.0 %	82.5 %	81.4 %	78.9 %	85.9 %	83.9 %	81.5 %	79.5 %	87.4 %	61.4 %
No	18.6 %	15.0 %	17.5 %	18.6 %	21.1 %	14.1 %	16.1 %	18.5 %	20.5 %	12.6 %	38.6 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Yes	81.4 %	69.1 %	79.8 %	80.0 %	85.0 %	86.4 %	85.0 %	91.7 %	89.5 %
No	18.6 %	30.9 %	20.2 %	20.0 %	15.0 %	13.6 %	15.0 %	8.3 %	10.5 %

	Total	EMEA	APAC	USA
Yes	81.4 %	79.0 %	85.6 %	83.2 %
No	18.6 %	21.0 %	14.4 %	16.8 %

Where do you get IT support for your business?																
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
I have the necessary skills to maintain the system and deal with problems	42.7%	49.8%	48.6%	38.6%	38.0%	32.9%	33.6%	37.5%	61.0%	52.0%	39.7%	49.2%	38.5%	37.8%	33.8%	36.7%
I use an IT services/support company when required	32.4%	22.7%	39.8%	20.3%	22.7%	31.0%	30.4%	30.4%	33.1%	40.4%	33.8%	39.8%	36.0%	31.4%	39.6%	35.3%
I have a contract with an IT services/support company that maintains our systems	24.4%	20.7%	20.7%	29.1%	17.3%	14.9%	16.0%	23.7%	24.8%	18.4%	23.8%	51.2%	26.1%	19.9%	27.3%	30.7%
The PC retailer provides IT support when required	19.3%	25.9%	15.1%	7.6%	8.0%	12.9%	13.6%	24.1%	6.3%	20.4%	13.9%	44.5%	35.4%	19.2%	23.4%	20.0%
I employ an IT professional(s)	19.0%	8.4%	17.5%	16.7%	12.0%	21.6%	5.2%	19.8%	35.0%	22.0%	21.9%	38.7%	12.4%	19.9%	9.1%	15.3%
A friend helps when I have a problem	15.0%	12.4%	12.0%	16.3%	15.3%	22.4%	14.4%	9.5%	5.5%	22.4%	11.9%	17.2%	24.8%	19.2%	11.0%	12.0%
Someone within my business has the IT skills required, but it's not their main job	14.2%	15.5%	15.1%	8.0%	10.7%	11.8%	10.4%	13.0%	10.2%	19.6%	20.5%	22.3%	9.9%	19.2%	13.0%	14.7%
I use an IT Hosting provider	7.7%	3.2%	4.4%	5.6%	9.3%	7.5%	4.8%	5.5%	14.6%	8.0%	4.0%	22.3%	5.2%	4.5%	5.2%	6.0%

Commentary

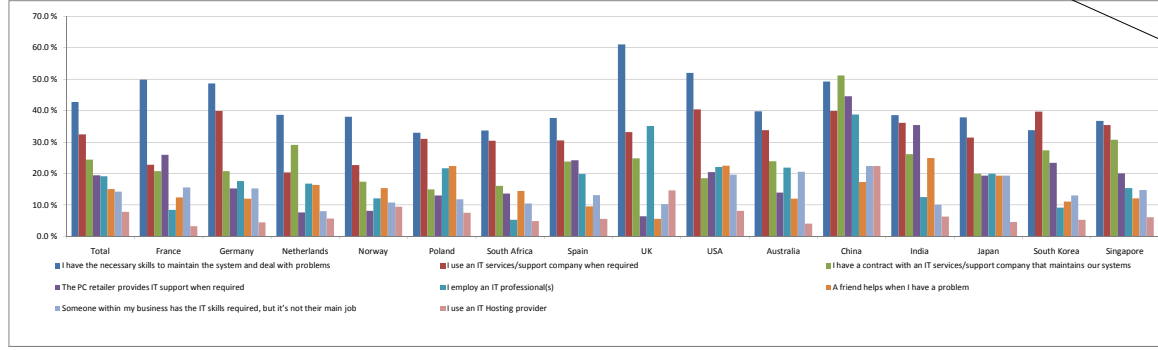
Overall, around four in ten respondents reported they have the necessary skills to handle their IT systems, but over half of the respondents in the USA and even more so in UK believed they were capable.

In contrast, the lowest proportion of respondents to report this were in Poland, South Africa and South Korea where only around a third believed they were capable.

We must consider the respondent function at this stage. Within the smallest company, this would be an owner/manager or senior decision maker whereas in the other organisations, we would be aiming for the IT decision maker. If IT is important to the smallest company, then it is likely that our respondent will have an IT familiarity at the least. Of course, when researching the IT decision-maker in the non-smallest companies, the vast majority will be IT professionals.

Over a fifth of respondents in China reported they use an IT hosting provider, making them the most likely to do so.

Whereas respondents in France are the least likely to.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
I have the necessary skills to maintain the system and deal with problems	42.7%	47.3%	43.9%	37.2%	35.4%	60.9%	38.3%	35.1%	40.4%	44.2%	34.5%
I use an IT services/support company when required	32.4%	37.7%	33.3%	32.9%	34.1%	27.5%	32.3%	32.1%	32.1%	34.7%	26.9%
I have a contract with an IT services/support company that maintains our systems	24.4%	25.6%	31.0%	24.3%	25.0%	19.8%	18.5%	22.3%	21.2%	35.8%	23.4%
The PC retailer provides IT support when required	19.3%	16.6%	22.0%	21.1%	16.6%	18.3%	20.2%	26.8%	20.5%	18.9%	9.9%
I employ an IT professional(s)	19.0%	27.5%	22.0%	11.8%	17.5%	25.3%	13.7%	15.5%	14.7%	28.4%	12.3%
A friend helps when I have a problem	15.0%	15.0%	14.8%	15.4%	16.8%	10.8%	17.7%	14.3%	16.7%	10.5%	19.3%
Someone within my business has the IT skills required, but it's not their main job	14.2%	10.9%	16.2%	13.4%	14.9%	16.5%	10.9%	12.1%	19.9%	16.8%	9.4%
I use an IT Hosting provider	7.7%	8.3%	11.2%	6.1%	7.5%	7.9%	5.2%	5.3%	7.7%	7.4%	8.2%

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
I have the necessary skills to maintain the system and deal with problems	42.7%	43.9%	39.9%	37.6%	43.0%	42.0%	40.8%	50.0%	51.8%
I use an IT services/support company when required	32.4%	24.6%	29.4%	33.6%	34.6%	35.7%	33.1%	40.4%	37.7%
I have a contract with an IT services/support company that maintains our systems	24.4%	11.4%	21.7%	23.3%	26.4%	28.2%	36.7%	32.5%	30.0%
The PC retailer provides IT support when required	19.3%	14.0%	17.4%	18.7%	21.1%	21.1%	23.8%	21.9%	23.2%
I employ an IT professional(s)	19.0%	5.9%	10.8%	15.2%	19.8%	26.7%	34.9%	27.6%	31.8%
A friend helps when I have a problem	15.0%	20.5%	13.1%	15.4%	11.7%	13.6%	13.8%	15.8%	13.6%
Someone within my business has the IT skills required, but it's not their main job	14.2%	14.3%	16.4%	15.2%	14.1%	12.4%	11.1%	11.0%	18.6%
I use an IT Hosting provider	7.7%	6.3%	5.5%	5.5%	7.7%	7.0%	14.4%	9.6%	9.5%

	Total	EMEA	APAC	USA
I have the necessary skills to maintain the system and deal with problems	42.7%	42.8%	40.3%	52.0%
I use an IT services/support company when required	32.4%	29.1%	36.4%	40.4%
I have a contract with an IT services/support company that maintains our systems	24.4%	21.1%	31.9%	18.4%
The PC retailer provides IT support when required	19.3%	14.5%	28.0%	20.4%
I employ an IT professional(s)	19.0%	17.3%	21.4%	22.0%
A friend helps when I have a problem	15.0%	13.4%	16.2%	22.4%
Someone within my business has the IT skills required, but it's not their main job	14.2%	11.9%	17.1%	19.6%
I use an IT Hosting provider	7.7%	6.7%	9.4%	8.0%

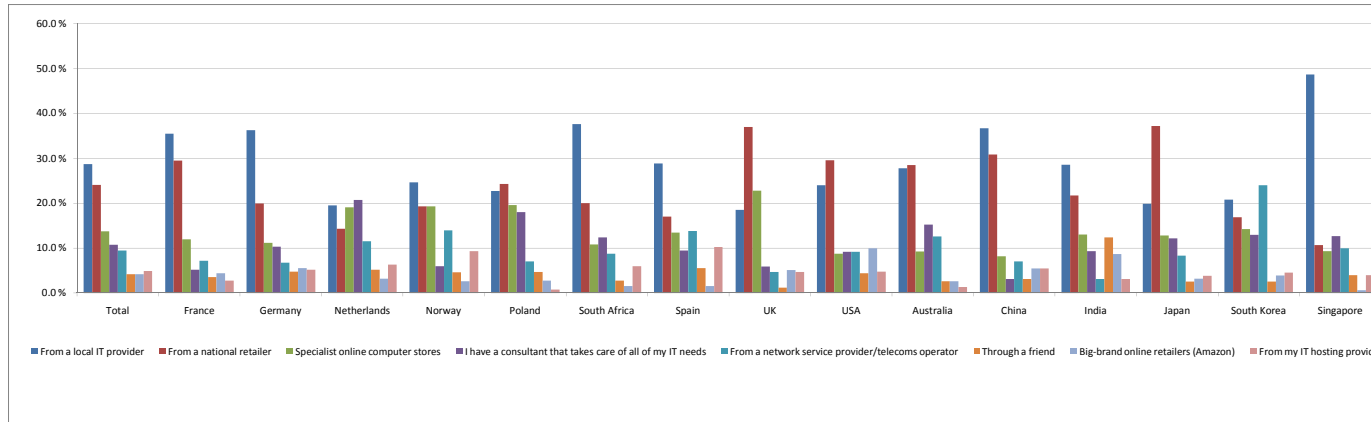
Where do you primarily buy IT software (such as email, mobile email/communications, software tools like CRM or Office)? (NB Not hardware)

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
From a local IT provider	28.7 %	35.5 %	36.3 %	19.5 %	24.7 %	22.7 %	37.6 %	28.9 %	18.5 %	24.0 %	27.8 %	36.7 %	28.6 %	19.9 %	20.8 %	48.7 %
From a national retailer	24.1 %	29.5 %	19.9 %	14.3 %	19.3 %	24.3 %	20.0 %	17.0 %	37.0 %	29.6 %	28.5 %	30.9 %	21.7 %	37.2 %	16.9 %	10.7 %
Specialist online computer stores	13.7 %	12.0 %	11.2 %	19.1 %	19.3 %	19.6 %	10.8 %	13.4 %	22.8 %	8.8 %	9.3 %	8.2 %	13.0 %	12.8 %	14.3 %	9.3 %
I have a consultant that takes care of all of my IT needs	10.7 %	5.2 %	10.4 %	20.7 %	6.0 %	18.0 %	12.4 %	9.5 %	5.9 %	9.2 %	15.2 %	3.1 %	9.3 %	12.2 %	13.0 %	12.7 %
From a network service provider/telecoms operator	9.5 %	7.2 %	6.8 %	11.6 %	14.0 %	7.1 %	8.8 %	13.8 %	4.7 %	9.2 %	12.6 %	7.0 %	3.1 %	8.3 %	24.0 %	10.0 %
Through a friend	4.2 %	3.6 %	4.8 %	5.2 %	4.7 %	4.7 %	2.8 %	5.5 %	1.2 %	4.4 %	2.6 %	3.1 %	12.4 %	2.6 %	2.6 %	4.0 %
Big-brand online retailers (Amazon)	4.2 %	4.4 %	5.6 %	3.2 %	2.7 %	2.7 %	1.6 %	1.6 %	5.1 %	10.0 %	2.6 %	5.5 %	8.7 %	3.2 %	3.9 %	0.7 %
From my IT hosting provider	4.9 %	2.8 %	5.2 %	6.4 %	9.3 %	0.8 %	6.0 %	10.3 %	4.7 %	4.8 %	1.3 %	5.5 %	3.1 %	3.8 %	4.5 %	4.0 %

Commentary

The most common source of IT software is a local IT provider, reported by almost three in ten respondents. However, this proportion is significantly greater in Singapore where almost half chose this option.

An IT hosting provider was the least reported source of IT software, where overall it was selected by one in twenty respondents. However, in Spain this proportion is one in ten, making them the most likely nation to purchase IT software through a hosting provider. In contrast, Poland is the nation least likely to, where less than one percent reported this choice.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
From a local IT provider	28.7 %	31.3 %	29.7 %	29.3 %	27.3 %	26.5 %	29.4 %	34.0 %	30.1 %	26.3 %	21.1 %
From a national retailer	24.1 %	26.8 %	29.5 %	22.9 %	20.9 %	24.6 %	20.2 %	23.4 %	26.9 %	22.1 %	20.5 %
Specialist online computer stores	13.7 %	10.5 %	9.6 %	12.9 %	16.0 %	20.2 %	16.9 %	8.7 %	9.0 %	14.7 %	14.6 %
I have a consultant that takes care of all of my IT needs	10.7 %	12.8 %	10.2 %	10.7 %	12.8 %	10.2 %	9.3 %	10.6 %	8.3 %	7.4 %	10.5 %
From a network service provider/telecoms operator	9.5 %	6.7 %	7.1 %	11.1 %	10.2 %	9.8 %	9.3 %	10.2 %	7.7 %	9.5 %	14.6 %
From my IT hosting provider	4.9 %	4.8 %	6.0 %	5.7 %	4.5 %	2.6 %	5.2 %	3.4 %	5.8 %	10.5 %	5.8 %
Through a friend	4.2 %	2.6 %	4.6 %	5.2 %	3.8 %	2.9 %	4.8 %	4.2 %	4.5 %	4.2 %	7.6 %
Big-brand online retailers (Amazon)	4.2 %	4.5 %	3.3 %	2.3 %	4.5 %	3.3 %	4.8 %	5.7 %	7.7 %	5.3 %	5.3 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
From a local IT provider	28.7 %	26.2 %	31.7 %	32.0 %	27.8 %	29.1 %	25.2 %	26.3 %	31.4 %
From a national retailer	24.1 %	20.7 %	20.2 %	19.6 %	24.7 %	26.5 %	33.1 %	29.4 %	25.9 %
Specialist online computer stores	13.7 %	19.2 %	13.7 %	17.1 %	12.3 %	10.4 %	9.4 %	10.1 %	11.4 %
I have a consultant that takes care of all of my IT needs	10.7 %	8.5 %	12.1 %	10.6 %	15.4 %	10.9 %	11.1 %	6.6 %	8.2 %
From a network service provider/telecoms operator	9.5 %	7.3 %	7.8 %	9.4 %	9.0 %	12.4 %	9.7 %	11.8 %	11.8 %
From my IT hosting provider	4.9 %	5.7 %	5.5 %	3.9 %	3.7 %	3.9 %	6.2 %	5.3 %	5.5 %
Through a friend	4.2 %	6.8 %	4.7 %	3.7 %	4.0 %	3.2 %	2.9 %	4.4 %	0.9 %
Big-brand online retailers (Amazon)	4.2 %	5.7 %	4.3 %	3.7 %	3.1 %	3.6 %	2.3 %	6.1 %	5.0 %

	Total	EMEA	APAC	USA
From a local IT provider	28.7 %	28.1 %	30.9 %	24.0 %
From a national retailer	24.1 %	22.9 %	25.0 %	29.6 %
Specialist online computer stores	13.7 %	15.9 %	10.9 %	8.8 %
I have a consultant that takes care of all of my IT needs	10.7 %	11.3 %	10.1 %	9.2 %
From a network service provider/telecoms operator	9.5 %	9.0 %	10.4 %	9.2 %
Through a friend	4.2 %	4.0 %	4.5 %	4.4 %
Big-brand online retailers (Amazon)	4.2 %	3.4 %	4.3 %	10.0 %
From my IT hosting provider	4.9 %	5.5 %	3.9 %	4.8 %

Which of the following IT tools do you have? Email

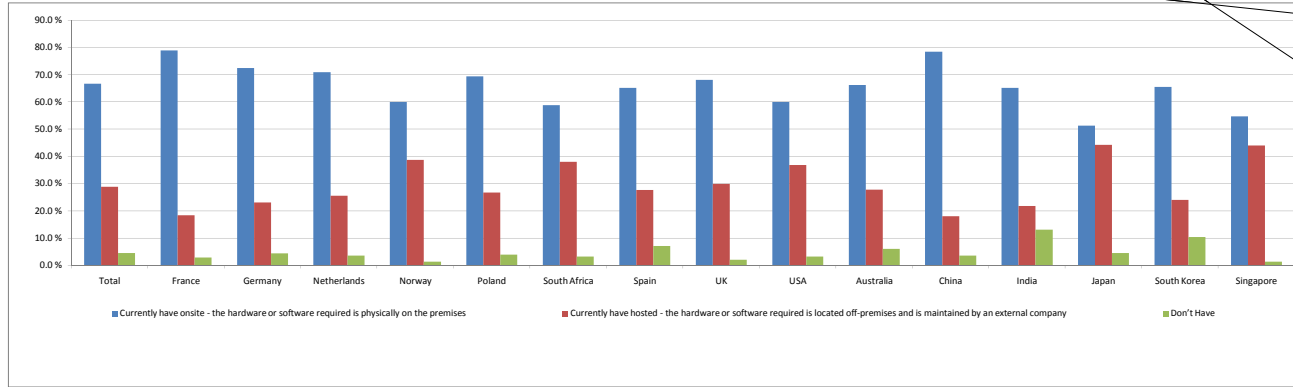
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Currently have onsite - the hardware or software required is physically on the premises	66.7 %	78.9 %	72.5 %	70.9 %	60.0 %	69.4 %	58.8 %	65.2 %	68.1 %	60.0 %	66.2 %	78.5 %	65.2 %	51.3 %	65.6 %	54.7 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	28.9 %	18.3 %	23.1 %	25.5 %	38.7 %	26.7 %	38.0 %	27.7 %	29.9 %	36.8 %	27.8 %	18.0 %	21.7 %	44.2 %	24.0 %	44.0 %
Don't Have	4.4 %	2.8 %	4.4 %	3.6 %	1.3 %	3.9 %	3.2 %	7.1 %	2.0 %	3.2 %	6.0 %	3.5 %	13.0 %	4.5 %	10.4 %	1.3 %

Commentary

Respondents reported that they are most likely to have their email onsite, this option chosen by two-thirds of them.  
France is the nation most likely to do so, whereas Japan is the nation least likely to.

Overall, less than three in ten respondents reported having their email hosted, with China least likely to and Japan most likely to.

India are the nation most likely to not have email, with more than one in ten reporting this.



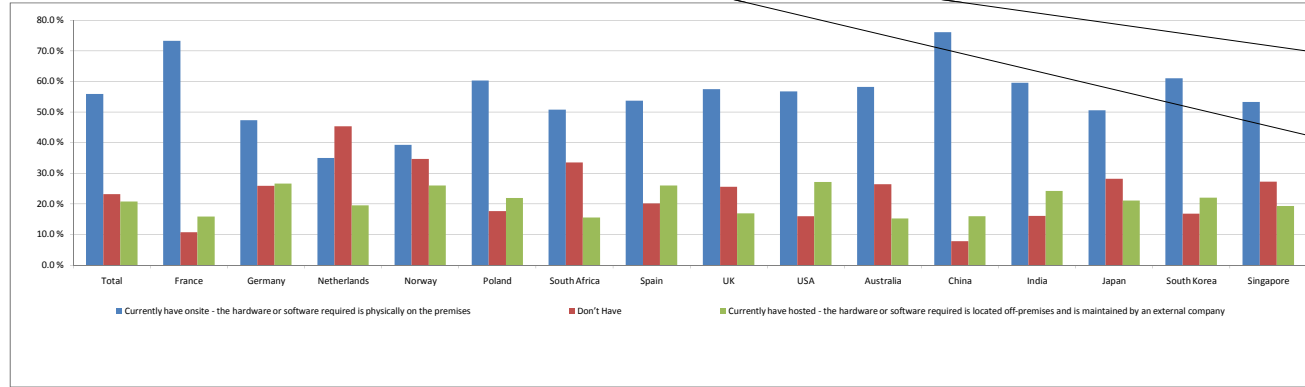
	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Currently have onsite - the hardware or software required is physically on the premises	66.7 %	66.5 %	68.4 %	68.0 %	63.8 %	67.6 %	68.1 %	67.5 %	63.5 %	66.3 %	64.3 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	28.9 %	27.8 %	26.8 %	27.7 %	33.7 %	29.9 %	24.6 %	24.9 %	31.4 %	30.5 %	31.0 %
Don't Have	4.4 %	5.8 %	4.8 %	4.3 %	2.4 %	2.4 %	7.3 %	7.5 %	5.1 %	3.2 %	4.7 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Currently have onsite - the hardware or software required is physically on the premises	66.7 %	60.2 %	64.6 %	66.1 %	67.6 %	71.8 %	72.1 %	67.5 %	69.5 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	28.9 %	36.3 %	30.1 %	28.6 %	28.2 %	24.5 %	22.9 %	28.5 %	25.5 %
Don't Have	4.4 %	3.6 %	5.3 %	5.3 %	4.2 %	3.6 %	5.0 %	3.9 %	5.0 %

	Total	EMEA	APAC	USA
Currently have onsite - the hardware or software required is physically on the premises	66.7 %	68.4 %	65.1 %	60.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	28.9 %	27.9 %	28.7 %	36.8 %
Don't Have	4.4 %	3.7 %	6.2 %	3.2 %

Which of the following IT tools do you have? File sharing/collaboration (i.e. online, real time collaboration/editing tools, i.e. Sharepoint)

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Currently have onsite - the hardware or software required is physically on the premises	56.0 %	73.3 %	47.4 %	35.1 %	39.3 %	60.4 %	50.8 %	53.8 %	57.5 %	56.8 %	58.3 %	76.2 %	59.6 %	50.6 %	61.0 %	53.3 %
Don't Have	23.2 %	10.8 %	25.9 %	45.4 %	34.7 %	17.6 %	33.6 %	20.2 %	25.6 %	16.0 %	26.5 %	7.8 %	16.1 %	28.2 %	16.9 %	27.3 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.9 %	15.9 %	26.7 %	19.5 %	26.0 %	22.0 %	15.6 %	26.1 %	16.9 %	27.2 %	15.2 %	16.0 %	24.2 %	21.2 %	22.1 %	19.3 %



Commentary

Having file sharing/collaboration tools onsite was the most popular response, chosen by over half of respondents. This is particularly true in China, where over three quarters of respondents did so. Having these tools onsite proved least popular in the Netherlands where only around a third reported this choice mainly because there's a lower incidence of use amongst the Netherlands respondents.

Overall, it is more likely that respondents don't have these tools than have them hosted, and this choice is demonstrated most in Netherlands where almost half of respondents said they don't have these tools, hosted or onsite.

However, there are six nations where the proportion to have these tools hosted is greater than that of respondents who don't have them; these nations being South Korea, India, USA, Spain, Poland and Germany.

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Currently have onsite - the hardware or software required is physically on the premises	56.0 %	62.9 %	55.9 %	51.7 %	50.7 %	66.2 %	54.4 %	59.6 %	59.0 %	63.2 %	31.0 %
Don't Have	23.2 %	16.0 %	24.7 %	27.0 %	25.0 %	11.8 %	24.2 %	24.2 %	23.1 %	14.7 %	50.9 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.9 %	21.1 %	19.3 %	21.3 %	24.3 %	22.0 %	21.4 %	16.2 %	17.9 %	22.1 %	18.1 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Currently have onsite - the hardware or software required is physically on the premises	56.0 %	41.5 %	54.8 %	54.4 %	59.5 %	65.0 %	63.0 %	60.1 %	62.7 %
Don't Have	23.2 %	41.1 %	24.3 %	23.3 %	18.9 %	15.8 %	14.7 %	13.2 %	16.4 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.9 %	17.4 %	20.9 %	22.4 %	21.6 %	19.2 %	22.3 %	26.8 %	20.9 %

	Total	EMEA	APAC	USA
Currently have onsite - the hardware or software required is physically on the premises	56.0 %	52.9 %	61.5 %	56.8 %
Don't Have	23.2 %	26.3 %	19.2 %	16.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.9 %	20.8 %	19.4 %	27.2 %

Which of the following IT tools do you have? Backup

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Currently have onsite - the hardware or software required is physically on the premises	70.9 %	75.3 %	78.5 %	67.3 %	64.7 %	74.1 %	74.4 %	66.0 %	79.9 %	66.8 %	69.5 %	77.7 %	59.0 %	60.9 %	68.8 %	66.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	23.1 %	19.9 %	23.5 %	28.7 %	16.1 %	11.6 %	27.7 %	16.1 %	27.6 %	21.9 %	18.4 %	32.3 %	20.5 %	18.2 %	22.7 %
Don't Have	7.6 %	1.6 %	1.6 %	9.2 %	6.7 %	9.8 %	14.0 %	6.3 %	3.9 %	5.6 %	8.6 %	3.9 %	8.7 %	18.6 %	13.0 %	11.3 %

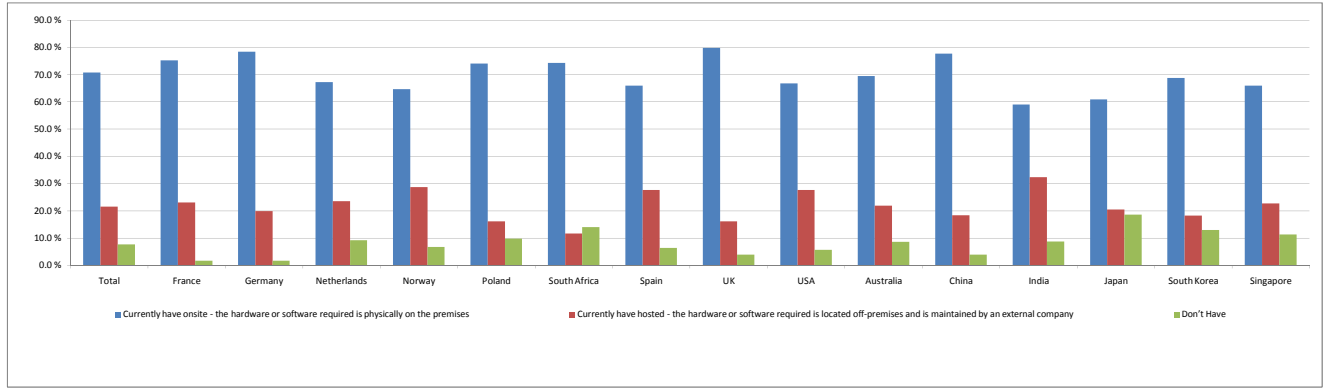
Commentary

Overall, seven in ten respondents have backup tools onsite, with Germany most likely to, and India least likely to.

Only around one in five respondents currently have their hosted backup tools, and this option is most popular in Norway, but least so in South Africa.

Almost one in five respondents in India don't have any backup tools.

Conversely, France and Germany are the nations most likely to have backup tools, with less than two percent reporting otherwise.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Currently have onsite - the hardware or software required is physically on the premises	70.9 %	69.3 %	72.1 %	73.7 %	71.6 %	75.2 %	65.3 %	69.8 %	67.9 %	69.5 %	61.4 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	23.3 %	19.8 %	18.4 %	22.0 %	20.8 %	25.4 %	20.0 %	25.0 %	27.4 %	21.6 %
Don't Have	7.6 %	7.3 %	8.1 %	7.9 %	6.4 %	4.1 %	9.3 %	10.2 %	7.1 %	3.2 %	17.0 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Currently have onsite - the hardware or software required is physically on the premises	70.9 %	71.9 %	70.8 %	68.0 %	72.5 %	73.3 %	71.3 %	66.7 %	70.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	14.8 %	21.5 %	22.6 %	22.7 %	21.1 %	24.6 %	28.9 %	23.6 %
Don't Have	7.6 %	13.3 %	7.8 %	9.4 %	4.8 %	5.6 %	4.1 %	4.4 %	6.4 %

	Total	EMEA	APAC	USA
Currently have onsite - the hardware or software required is physically on the premises	70.9 %	73.0 %	68.0 %	66.8 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	20.4 %	22.0 %	27.6 %
Don't Have	7.6 %	6.6 %	10.0 %	5.6 %

Which of the following IT tools do you have? Customer Relation Management (CRM)

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Currently have onsite - the hardware or software required is physically on the premises	52.3 %	67.3 %	52.2 %	47.4 %	43.3 %	50.6 %	38.0 %	64.4 %	50.8 %	56.0 %	49.7 %	75.0 %	55.3 %	22.4 %	51.3 %	40.0 %
Don't Have	30.4 %	13.9 %	26.3 %	39.8 %	40.0 %	31.0 %	51.2 %	15.0 %	35.4 %	24.4 %	31.8 %	9.0 %	20.5 %	62.2 %	34.2 %	43.3 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	17.3 %	18.7 %	21.5 %	12.7 %	16.7 %	18.4 %	10.8 %	20.6 %	13.8 %	19.6 %	18.5 %	16.0 %	24.2 %	15.4 %	16.9 %	16.7 %

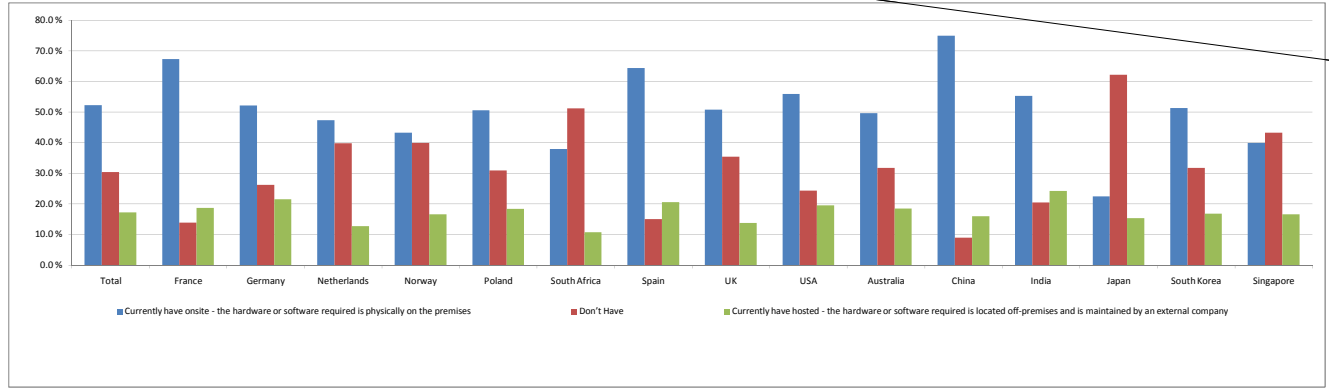
Commentary

More than half of respondents have CRM tools onsite. Respondents in China are the most likely to do so; three quarters of them reporting so.

Respondents in Japan are the least likely to have CRM tools, and of those that do, they are the least likely to have their CRM tools onsite.

Less than one in five respondents reported having hosted CRM tools. They are most popular in India, where almost a quarter of respondents reported having them, and least popular in South Africa, where only around one in ten do so.

In France, Spain, China and India, it is more likely that respondents have hosted CRM tools than don't have CRM tools - the only four nations where this is true.



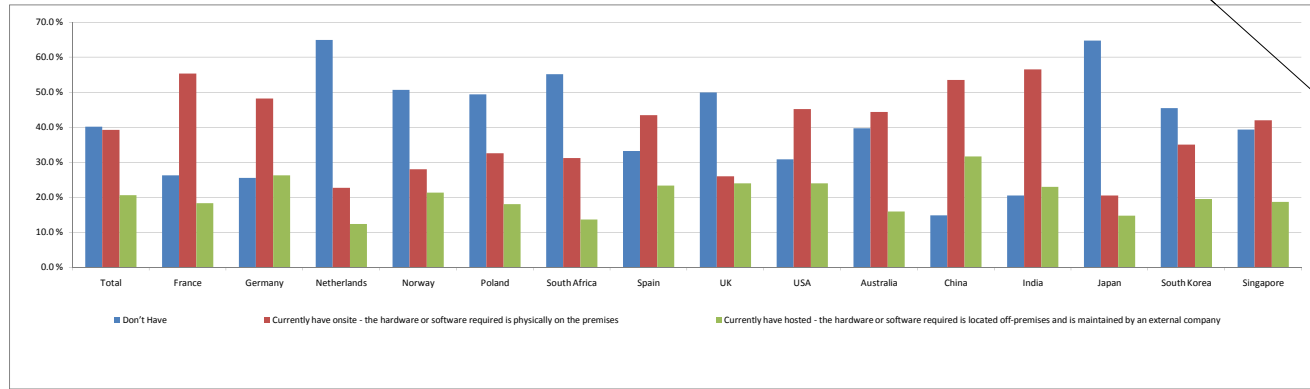
	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Currently have onsite - the hardware or software required is physically on the premises	52.3 %	60.7 %	50.3 %	51.2 %	51.0 %	61.1 %	47.6 %	50.2 %	56.4 %	46.3 %	33.3 %
Don't Have	30.4 %	20.8 %	32.8 %	33.3 %	32.6 %	20.6 %	32.3 %	34.3 %	28.2 %	21.1 %	54.4 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	17.3 %	18.5 %	16.8 %	15.4 %	16.4 %	18.3 %	20.2 %	15.5 %	15.4 %	32.6 %	12.3 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Currently have onsite - the hardware or software required is physically on the premises	52.3 %	38.2 %	50.7 %	49.3 %	53.7 %	59.0 %	58.4 %	67.5 %	60.5 %
Don't Have	30.4 %	51.2 %	35.8 %	32.7 %	24.4 %	22.1 %	20.2 %	13.2 %	17.7 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	17.3 %	10.6 %	13.5 %	18.0 %	21.8 %	18.9 %	21.4 %	19.3 %	21.8 %

	Total	EMEA	APAC	USA
Currently have onsite - the hardware or software required is physically on the premises	52.3 %	52.2 %	51.6 %	56.0 %
Don't Have	30.4 %	31.1 %	30.8 %	24.4 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	17.3 %	16.7 %	17.8 %	19.6 %

Which of the following IT tools do you use? Webconferencing (i.e. Online conference call tools Webex, LiveMeeting)

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Don't Have	40.2 %	26.3 %	25.5 %	64.9 %	60.2 %	49.4 %	55.2 %	33.2 %	50.0 %	30.8 %	39.7 %	14.8 %	20.5 %	64.7 %	45.5 %	39.3 %
Currently have onsite - the hardware or software required is physically on the premises	39.2 %	55.4 %	48.2 %	22.7 %	28.0 %	32.5 %	31.2 %	43.5 %	26.0 %	45.2 %	44.4 %	53.5 %	56.5 %	20.5 %	35.1 %	42.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.6 %	18.3 %	26.3 %	12.4 %	21.3 %	18.0 %	13.6 %	23.3 %	24.0 %	24.0 %	15.9 %	31.6 %	23.0 %	14.7 %	19.5 %	18.7 %



Commentary

More than four in ten respondents don't have webconferencing tools, and almost two-thirds don't in the Netherlands, making them the nation most likely to not have these tools.

However, there are eight nations where a greater proportion of respondents have webconferencing tools onsite, than not having them at all; France, Germany, Spain, USA, Australia, China, India and Singapore.

Although only around one in five respondents reported having hosted webconferencing tools, more than three in ten did in China, where a greater proportion reported having hosted webconferencing than did not having webconferencing - the only nation to do so.

The nation least likely to have hosted webconferencing tools is the Netherlands.

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Don't Have	40.2 %	30.7 %	39.1 %	46.9 %	39.9 %	30.5 %	43.5 %	46.8 %	42.9 %	23.2 %	63.2 %
Currently have onsite - the hardware or software required is physically on the premises	39.2 %	45.4 %	37.4 %	37.4 %	36.7 %	47.0 %	37.9 %	42.6 %	37.2 %	37.9 %	22.8 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.6 %	24.0 %	23.5 %	15.6 %	23.4 %	22.4 %	18.5 %	10.6 %	19.9 %	38.9 %	14.0 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Don't Have	40.2 %	62.9 %	46.4 %	43.3 %	30.2 %	33.3 %	26.4 %	27.6 %	24.1 %
Currently have onsite - the hardware or software required is physically on the premises	39.2 %	25.4 %	36.2 %	37.8 %	46.7 %	43.2 %	46.0 %	44.7 %	48.6 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.6 %	11.7 %	17.4 %	18.9 %	23.1 %	23.5 %	27.6 %	27.6 %	27.3 %

	Total	EMEA	APAC	USA
Don't Have	40.2 %	44.1 %	35.1 %	30.8 %
Currently have onsite - the hardware or software required is physically on the premises	39.2 %	36.3 %	43.2 %	45.2 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	20.6 %	19.6 %	21.7 %	24.0 %

Which of the following IT tools do you have? Website

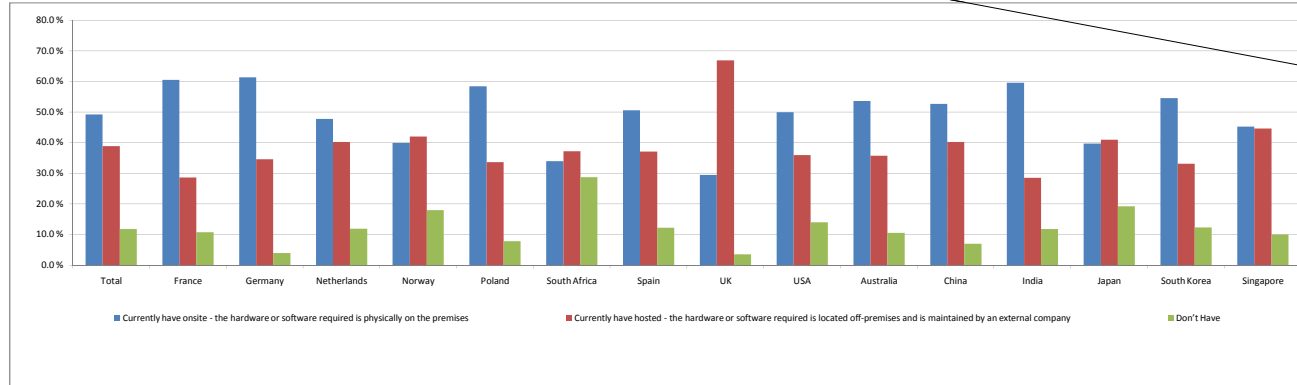
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Currently have onsite - the hardware or software required is physically on the premises	49.3 %	60.6 %	61.4 %	47.8 %	40.0 %	58.4 %	34.0 %	50.6 %	29.5 %	50.0 %	53.6 %	52.7 %	59.6 %	39.7 %	54.5 %	45.3 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	38.9 %	28.7 %	34.7 %	40.2 %	42.0 %	33.7 %	37.2 %	37.2 %	66.9 %	36.0 %	35.8 %	40.2 %	28.6 %	41.0 %	33.1 %	44.7 %
Don't Have	11.8 %	10.8 %	4.0 %	12.0 %	18.0 %	7.8 %	28.8 %	12.2 %	3.5 %	14.0 %	10.6 %	7.0 %	11.8 %	19.3 %	12.3 %	10.0 %

Commentary

Almost half of respondents reported having their website onsite, making it the most popular response. This is most evident in Germany where over six in ten respondents reported this preference.

Four nations demonstrated a preference for having their website hosted rather than onsite; Norway, South Africa, the UK and Japan. This preference is particularly true in the UK, where more than two-thirds of respondents have their website hosted.

Respondents in South Africa are the likely to have a website - almost three in ten answering so. Respondents in Germany however are most likely to, only four percent answering they don't have a website.



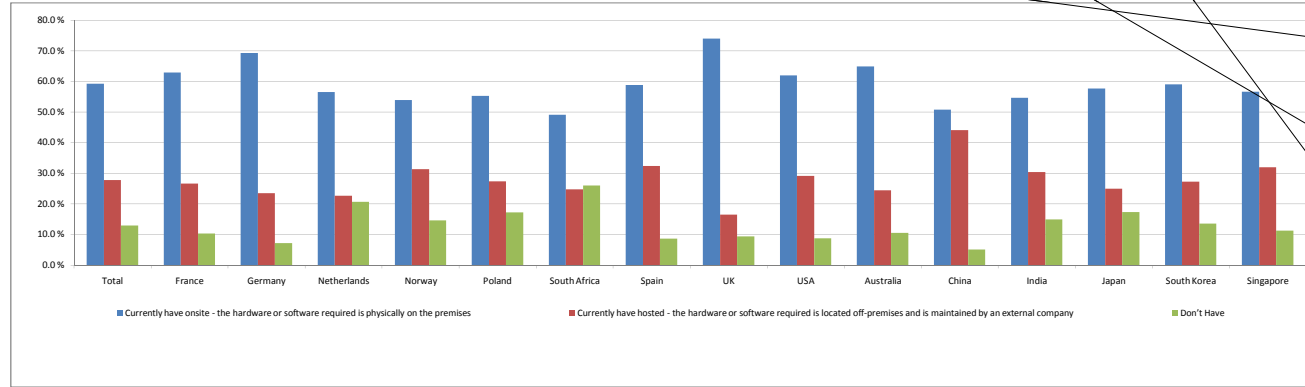
	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Currently have onsite - the hardware or software required is physically on the premises	49.3 %	50.2 %	46.8 %	49.9 %	45.8 %	56.4 %	52.4 %	49.8 %	45.5 %	51.6 %	40.4 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	38.9 %	40.3 %	41.4 %	37.4 %	42.4 %	36.7 %	39.9 %	33.6 %	36.5 %	40.0 %	36.8 %
Don't Have	11.8 %	9.6 %	11.9 %	12.7 %	11.9 %	6.9 %	7.7 %	16.6 %	17.9 %	8.4 %	22.8 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Currently have onsite - the hardware or software required is physically on the premises	49.3 %	40.2 %	48.7 %	48.8 %	52.6 %	52.9 %	54.8 %	48.7 %	55.5 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	38.9 %	38.2 %	37.4 %	37.3 %	39.0 %	39.6 %	38.4 %	46.9 %	37.7 %
Don't Have	11.8 %	21.6 %	13.9 %	13.8 %	8.4 %	7.5 %	6.7 %	4.4 %	6.8 %

	Total	EMEA	APAC	USA
Currently have onsite - the hardware or software required is physically on the premises	49.3 %	48.2 %	51.2 %	50.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	38.9 %	40.0 %	37.5 %	36.0 %
Don't Have	11.8 %	11.8 %	11.4 %	14.0 %

Which of the following IT tools do you have? Server

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Currently have onsite - the hardware or software required is physically on the premises	59.3 %	62.9 %	69.3 %	56.6 %	54.0 %	55.3 %	49.2 %	58.9 %	74.0 %	62.0 %	64.9 %	50.8 %	54.7 %	57.7 %	59.1 %	56.7 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	27.8 %	26.7 %	23.5 %	22.7 %	31.3 %	27.5 %	24.8 %	32.4 %	16.5 %	29.2 %	24.5 %	44.1 %	30.4 %	25.0 %	27.3 %	32.0 %
Don't Have	12.9 %	10.4 %	7.2 %	20.7 %	14.7 %	17.3 %	26.0 %	8.7 %	9.4 %	8.8 %	10.6 %	5.1 %	14.9 %	17.3 %	13.6 %	11.3 %



Commentary

Almost one in six respondents reported having their server onsite, making this option twice as popular as having it hosted. This preference is demonstrated most by respondents in the UK where almost three-quarters of respondents answered having their server onsite.

In contrast less than half of respondents in South Africa answered this way, making them the least likely to have their server onsite.

South Africa is also the only nation where a greater proportion of respondents answered that they don't have a server, than having one which is hosted. However, they are not the nation least likely to have hosted servers, as this option was still chosen by around a quarter of its respondents.

Unsurprisingly, given their strong preference for servers onsite, respondents in UK are the least likely to have a hosted server.

Alternatively, China is the nation most likely to have hosted servers, with over four in ten respondents reporting as such. Also, China is the nation least likely to not have a server at all.

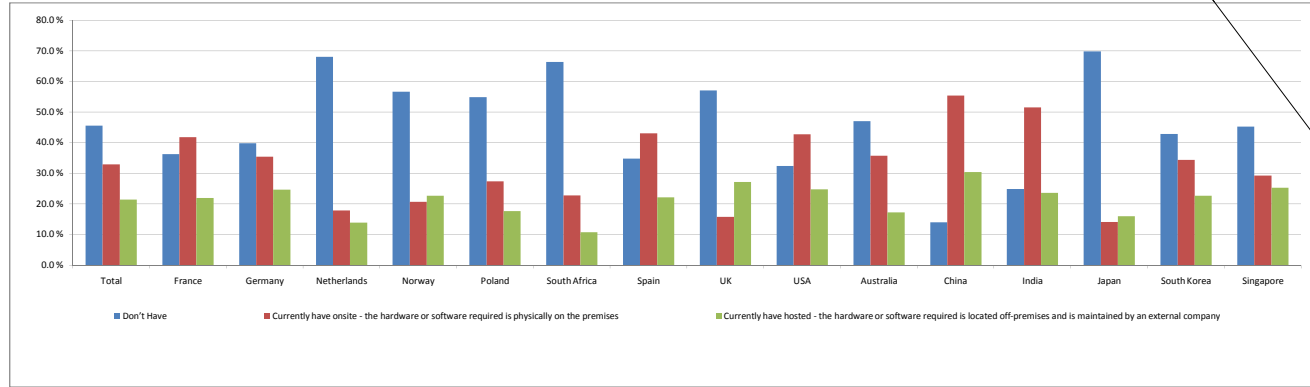
	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Currently have onsite - the hardware or software required is physically on the premises	59.3 %	59.4 %	61.1 %	59.4 %	56.7 %	69.0 %	53.2 %	57.7 %	52.6 %	54.7 %	53.2 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	27.8 %	31.3 %	26.2 %	26.5 %	30.3 %	24.4 %	31.5 %	26.4 %	28.2 %	41.1 %	19.9 %
Don't Have	12.9 %	9.3 %	12.7 %	14.1 %	13.0 %	6.5 %	15.3 %	15.8 %	19.2 %	4.2 %	26.9 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Currently have onsite - the hardware or software required is physically on the premises	59.3 %	47.6 %	60.1 %	59.4 %	65.4 %	67.5 %	63.0 %	58.3 %	56.8 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	27.8 %	25.0 %	26.6 %	27.2 %	26.7 %	25.7 %	30.8 %	34.6 %	33.6 %
Don't Have	12.9 %	27.3 %	13.3 %	13.4 %	7.9 %	6.8 %	6.2 %	7.0 %	9.5 %

	Total	EMEA	APAC	USA
Currently have onsite - the hardware or software required is physically on the premises	59.3 %	60.4 %	56.6 %	62.0 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	27.8 %	25.4 %	31.9 %	29.2 %
Don't Have	12.9 %	14.3 %	11.5 %	8.8 %

Which of the following IT tools do you have? E-commerce (Can people pay for goods/services on your website?)

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Don't Have	45.6 %	36.3 %	39.8 %	68.1 %	56.7 %	64.0 %	66.4 %	34.8 %	57.1 %	32.4 %	47.0 %	14.1 %	24.8 %	69.9 %	42.9 %	45.3 %
Currently have onsite - the hardware or software required is physically on the premises	32.9 %	41.8 %	35.5 %	17.9 %	20.7 %	27.5 %	22.8 %	43.1 %	15.7 %	42.8 %	35.8 %	55.5 %	51.3 %	14.1 %	34.4 %	29.3 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	21.9 %	24.7 %	13.9 %	22.7 %	17.6 %	10.8 %	22.1 %	27.2 %	24.8 %	17.2 %	30.5 %	23.6 %	16.0 %	22.7 %	25.3 %



Commentary

Almost half of the total respondents don't have e-commerce tools. The nation where this is most true is Japan where nearly seven in ten respondents don't have this tool.

Japan is one of six countries where the proportion of respondents to not have an e-commerce tool is greater than half, and so it is more likely that respondents in these countries don't have an e-commerce tool, than have one - be it hosted or onsite. The other five countries are: the UK, South Africa, Poland, Norway and the Netherlands.

However, Japan is also one of only two countries where the proportion of respondents to have an e-commerce tool onsite is greater than that of having onsite; the other one being UK.

France, Spain, USA, China and India are the only countries where the proportion of respondents to have an e-commerce tool onsite is greater than that of respondents who don't have one.

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Don't Have	45.6 %	36.1 %	46.2 %	43.1 %	50.7 %	39.3 %	40.7 %	51.3 %	46.8 %	35.8 %	73.1 %
Currently have onsite - the hardware or software required is physically on the premises	32.9 %	39.3 %	32.6 %	33.3 %	30.3 %	36.9 %	35.5 %	33.2 %	32.1 %	34.7 %	13.5 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	24.6 %	21.2 %	23.6 %	19.0 %	23.8 %	23.8 %	15.5 %	21.2 %	29.5 %	13.5 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Don't Have	45.6 %	66.7 %	52.6 %	48.6 %	38.8 %	39.3 %	36.1 %	25.0 %	27.7 %
Currently have onsite - the hardware or software required is physically on the premises	32.9 %	19.2 %	28.8 %	30.6 %	35.9 %	39.3 %	39.6 %	44.7 %	44.1 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	14.1 %	18.6 %	20.7 %	25.3 %	21.4 %	24.3 %	30.3 %	28.2 %

	Total	EMEA	APAC	USA
Don't Have	45.6 %	51.5 %	37.9 %	32.4 %
Currently have onsite - the hardware or software required is physically on the premises	32.9 %	28.5 %	38.7 %	42.8 %
Currently have hosted - the hardware or software required is located off-premises and is maintained by an external company	21.5 %	20.0 %	23.3 %	24.8 %

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Which of the following IT tools do you not have?

Base: Only respondents who answered they did not have at least one of the following IT tools

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
<b>E-commerce</b>	74.7 %	78.4 %	74.6 %	86.4 %	77.3 %	75.3 %	84.3 %	66.7 %	74.4 %	66.4 %	81.6 %	51.4 %	46.5 %	83.2 %	68.8 %	74.7 %
<b>Webconferencing</b>	65.7 %	56.9 %	47.8 %	82.3 %	69.1 %	67.7 %	70.1 %	63.6 %	65.1 %	63.1 %	69.0 %	54.3 %	38.4 %	77.1 %	72.9 %	64.8 %
<b>CRM</b>	49.8 %	30.2 %	49.3 %	50.5 %	54.5 %	42.5 %	65.0 %	28.8 %	46.2 %	50.0 %	55.2 %	32.9 %	38.4 %	74.0 %	51.0 %	71.4 %
<b>File sharing/collaboration</b>	37.9 %	23.3 %	48.5 %	57.6 %	47.3 %	24.2 %	42.6 %	38.6 %	33.3 %	32.8 %	46.0 %	28.6 %	30.2 %	33.6 %	27.1 %	45.1 %
<b>Server</b>	21.2 %	22.4 %	13.4 %	26.3 %	20.0 %	23.7 %	33.0 %	16.7 %	12.3 %	18.0 %	18.4 %	18.6 %	27.9 %	20.6 %	21.9 %	18.7 %
<b>Website</b>	19.4 %	23.3 %	7.5 %	15.2 %	24.5 %	10.8 %	36.5 %	23.5 %	4.6 %	28.7 %	18.4 %	25.7 %	22.1 %	22.9 %	19.8 %	16.5 %
<b>Backup</b>	12.5 %	3.4 %	9.9 %	11.6 %	9.1 %	13.4 %	17.8 %	12.1 %	5.1 %	11.5 %	14.9 %	14.3 %	16.3 %	22.1 %	20.8 %	18.7 %
<b>Email</b>	7.3 %	6.0 %	8.2 %	4.5 %	1.8 %	5.4 %	4.1 %	13.6 %	2.6 %	6.6 %	10.3 %	12.9 %	24.4 %	5.3 %	16.7 %	2.2 %
<b>Base</b>	1951	116	134	198	110	186	197	132	195	122	87	70	86	131	96	91

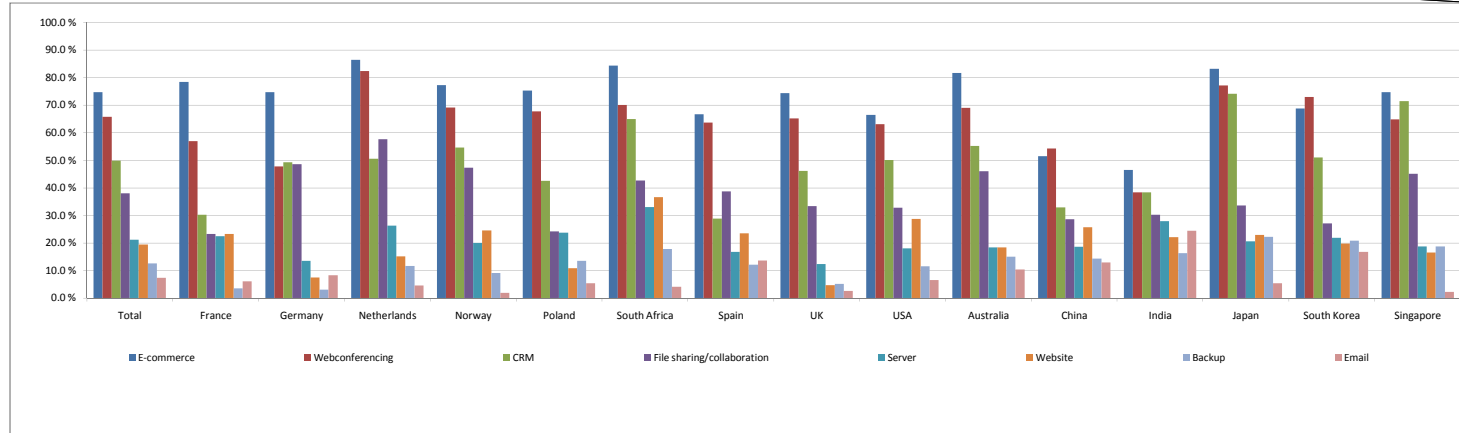
Commentary

E-commerce and webconferencing tools are the only two where more than half of the total respondents said they didn't have them.

Netherlands is the only country where more than half of the respondents do not have half of the tools available, making them the "worst-equipped" in regard to IT tools.

Only 70 Chinese respondents out of 256 reported not having at least one of the IT tools listed - making them the "best equipped".

Email and backup tools are used by the most respondents, be them hosted or onsite.



Base: Only respondents who answered they did not have at least one of the following IT tools

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
<b>E-commerce</b>	74.7 %	72.0 %	76.8 %	67.1 %	78.4 %	73.9 %	62.7 %	79.1 %	74.5 %	77.3 %	88.0 %
<b>Webconferencing</b>	65.7 %	61.1 %	65.1 %	73.1 %	61.8 %	57.5 %	67.1 %	72.1 %	68.4 %	50.0 %	76.1 %
<b>CRM</b>	49.8 %	41.4 %	54.7 %	51.9 %	50.4 %	38.2 %	49.7 %	52.9 %	44.9 %	45.5 %	65.5 %
<b>File sharing/collaboration</b>	37.9 %	31.8 %	41.2 %	42.0 %	38.8 %	22.2 %	37.3 %	37.2 %	36.7 %	31.8 %	61.3 %
<b>Server</b>	21.2 %	18.5 %	21.1 %	21.9 %	20.1 %	12.3 %	23.6 %	24.4 %	30.6 %	9.1 %	32.4 %
<b>Website</b>	19.4 %	19.1 %	19.7 %	19.8 %	18.4 %	13.0 %	11.8 %	25.6 %	28.6 %	18.2 %	27.5 %
<b>Backup</b>	12.5 %	14.6 %	13.5 %	12.4 %	9.9 %	7.7 %	14.3 %	15.7 %	11.2 %	6.8 %	20.4 %
<b>Email</b>	7.3 %	11.5 %	8.0 %	6.7 %	3.8 %	4.6 %	11.2 %	11.6 %	8.2 %	6.8 %	5.6 %
<b>Base</b>	1951	157	289	283	343	261	161	172	98	44	142

Base: Only respondents who answered they did not have at least one of the following IT tools

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
<b>E-commerce</b>	74.7 %	79.0 %	76.7 %	72.3 %	71.8 %	74.3 %	77.4 %	63.3 %	65.6 %
<b>Webconferencing</b>	65.7 %	74.6 %	67.8 %	64.4 %	55.9 %	62.8 %	56.6 %	70.0 %	67.0 %
<b>CRM</b>	49.8 %	60.7 %	52.2 %	48.6 %	45.3 %	41.7 %	43.4 %	33.3 %	41.9 %
<b>File sharing/collaboration</b>	37.9 %	48.7 %	35.5 %	34.6 %	35.1 %	29.8 %	31.4 %	33.3 %	38.7 %
<b>Server</b>	21.2 %	32.4 %	19.4 %	19.9 %	14.7 %	12.8 %	13.2 %	17.8 %	22.6 %
<b>Website</b>	19.4 %	25.6 %	20.3 %	20.5 %	15.5 %	14.2 %	14.5 %	11.1 %	16.1 %
<b>Backup</b>	12.5 %	15.8 %	11.3 %	14.0 %	9.0 %	10.6 %	8.8 %	11.1 %	15.1 %
<b>Email</b>	7.3 %	4.2 %	7.8 %	7.9 %	7.8 %	6.9 %	10.7 %	10.0 %	11.8 %
<b>Base</b>	1951	519	335	292	245	218	159	90	93

Base: Only respondents who answered they did not have at least one of the following IT tools

	Total	EMEA	APAC	USA
<b>E-commerce</b>	74.7 %	77.8 %	69.5 %	66.4 %
<b>Webconferencing</b>	65.7 %	66.6 %	64.3 %	63.1 %
<b>CRM</b>	49.8 %	47.0 %	56.1 %	50.0 %
<b>File sharing/collaboration</b>	37.9 %	39.7 %	35.1 %	32.8 %
<b>Server</b>	21.2 %	21.5 %	21.0 %	18.0 %
<b>Website</b>	19.4 %	17.8 %	20.9 %	28.7 %
<b>Backup</b>	12.5 %	10.0 %	18.4 %	11.5 %
<b>Email</b>	7.3 %	5.5 %	11.4 %	6.6 %
<b>Base</b>	1951	1268	561	122

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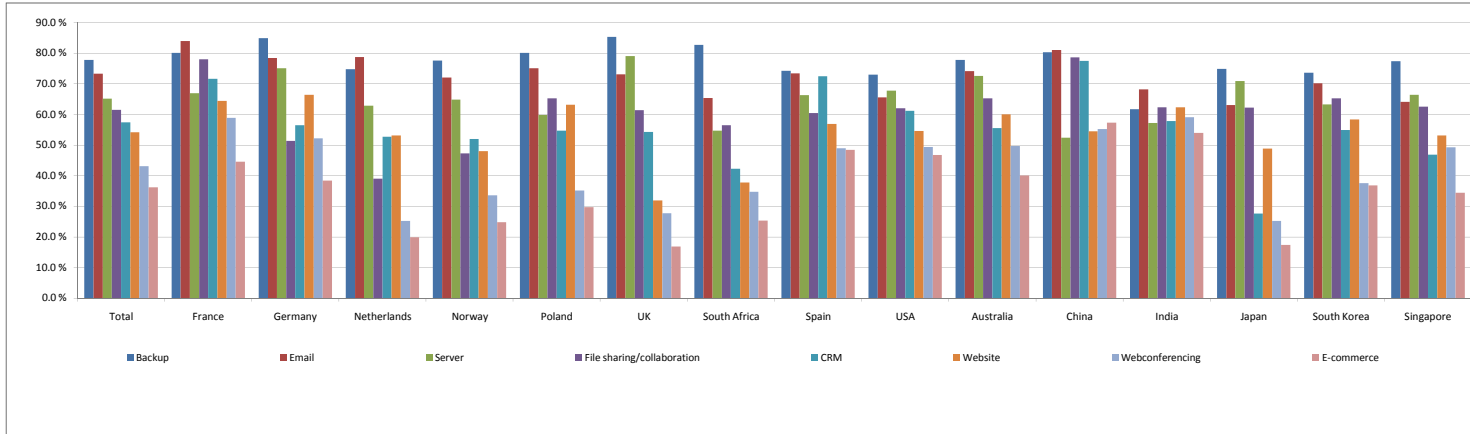
Which of the following IT tools do you have onsite?

Base: Only respondents who answered they have at least one of the following IT tools onsite

	Total	France	Germany	Netherlands	Norway	Poland	UK	South Africa	Spain	USA	Australia	China	India	Japan	South Korea	Singapore
<b>Backup</b>	77.8 %	80.1 %	84.9 %	74.8 %	77.6 %	80.1 %	85.3 %	82.7 %	74.2 %	72.9 %	77.8 %	80.2 %	61.7 %	74.8 %	73.6 %	77.3 %
<b>Email</b>	73.2 %	83.9 %	78.4 %	78.4 %	72.0 %	75.0 %	73.1 %	65.3 %	73.3 %	65.5 %	74.1 %	81.0 %	68.2 %	63.0 %	70.1 %	64.1 %
<b>Server</b>	65.1 %	66.9 %	75.0 %	62.8 %	64.8 %	59.7 %	79.0 %	54.7 %	66.2 %	67.7 %	72.6 %	52.4 %	57.1 %	70.9 %	63.2 %	66.4 %
<b>File sharing/collaboration</b>	61.5 %	78.0 %	51.3 %	38.9 %	47.2 %	65.3 %	61.3 %	56.4 %	60.4 %	62.0 %	65.2 %	78.6 %	62.3 %	62.2 %	65.3 %	62.5 %
<b>CRM</b>	57.4 %	71.6 %	56.5 %	52.7 %	52.0 %	54.7 %	54.2 %	42.2 %	72.4 %	61.1 %	55.6 %	77.4 %	57.8 %	27.6 %	54.9 %	46.9 %
<b>Website</b>	54.2 %	64.4 %	66.4 %	53.1 %	48.6 %	63.1 %	31.9 %	37.8 %	56.9 %	54.6 %	60.0 %	54.4 %	62.3 %	48.8 %	58.3 %	53.1 %
<b>Webconferencing</b>	43.1 %	58.9 %	52.2 %	25.2 %	33.2 %	35.2 %	27.7 %	34.7 %	48.9 %	49.3 %	49.6 %	55.2 %	59.1 %	25.2 %	37.5 %	49.2 %
<b>E-commerce</b>	36.1 %	44.5 %	38.4 %	19.9 %	24.8 %	29.7 %	16.8 %	25.3 %	48.4 %	46.7 %	40.0 %	57.3 %	53.9 %	17.3 %	36.8 %	34.4 %
<b>Base</b>	<b>2908</b>	<b>236</b>	<b>232</b>	<b>226</b>	<b>125</b>	<b>236</b>	<b>238</b>	<b>225</b>	<b>225</b>	<b>229</b>	<b>135</b>	<b>248</b>	<b>154</b>	<b>127</b>	<b>144</b>	<b>128</b>

Commentary

Backup and email tools are the two most likely tools to be had onsite - around three quarters of respondents answering so for both.



Base: Only respondents who answered they have at least one of the following IT tools onsite

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
<b>Backup</b>	77.8 %	76.7 %	78.2 %	79.3 %	77.9 %	79.9 %	72.6 %	79.1 %	78.5 %	75.9 %	74.5 %
<b>Email</b>	73.2 %	73.5 %	74.1 %	73.2 %	69.5 %	72.1 %	75.8 %	76.5 %	73.3 %	72.4 %	78.0 %
<b>Server</b>	65.1 %	65.7 %	66.2 %	63.9 %	61.7 %	73.4 %	59.2 %	65.4 %	60.7 %	59.8 %	64.5 %
<b>File sharing/collaboration</b>	61.5 %	69.6 %	60.6 %	55.6 %	55.1 %	70.3 %	60.5 %	67.5 %	68.1 %	69.0 %	37.6 %
<b>CRM</b>	57.4 %	67.1 %	54.5 %	55.1 %	55.5 %	64.9 %	52.9 %	56.8 %	65.2 %	50.6 %	40.4 %
<b>Website</b>	54.2 %	55.5 %	50.7 %	53.7 %	49.8 %	60.2 %	58.3 %	56.4 %	52.6 %	56.3 %	48.9 %
<b>Webconferencing</b>	43.1 %	50.2 %	40.5 %	40.2 %	40.0 %	50.0 %	42.2 %	48.3 %	43.0 %	41.4 %	27.7 %
<b>E-commerce</b>	36.1 %	43.5 %	35.4 %	35.9 %	33.0 %	39.2 %	39.5 %	37.6 %	37.0 %	37.9 %	16.3 %
<b>Base</b>	<b>2908</b>	<b>283</b>	<b>444</b>	<b>410</b>	<b>488</b>	<b>462</b>	<b>223</b>	<b>234</b>	<b>135</b>	<b>87</b>	<b>141</b>

Base: Only respondents who answered they have at least one of the following IT tools onsite

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
<b>Backup</b>	77.8 %	80.1 %	78.3 %	73.9 %	78.5 %	80.5 %	77.9 %	73.8 %	75.9 %
<b>Email</b>	73.2 %	67.2 %	71.5 %	71.9 %	73.3 %	78.9 %	78.8 %	74.8 %	75.4 %
<b>Server</b>	65.1 %	53.1 %	66.5 %	64.7 %	70.9 %	74.1 %	68.9 %	64.6 %	61.6 %
<b>File sharing/collaboration</b>	61.5 %	46.2 %	60.6 %	59.1 %	64.4 %	71.5 %	68.9 %	66.5 %	68.0 %
<b>CRM</b>	57.4 %	42.6 %	56.1 %	53.6 %	58.2 %	64.8 %	63.8 %	74.8 %	65.5 %
<b>Website</b>	54.2 %	44.9 %	53.8 %	53.1 %	57.0 %	58.1 %	59.9 %	53.9 %	60.1 %
<b>Webconferencing</b>	43.1 %	28.3 %	40.0 %	41.1 %	50.6 %	47.5 %	50.3 %	49.5 %	52.7 %
<b>E-commerce</b>	36.1 %	21.4 %	31.9 %	33.3 %	38.8 %	43.2 %	43.3 %	49.5 %	47.8 %
<b>Base</b>	<b>2908</b>	<b>552</b>	<b>442</b>	<b>399</b>	<b>419</b>	<b>375</b>	<b>312</b>	<b>206</b>	<b>203</b>

Base: Only respondents who answered they have at least one of the following IT tools onsite

	Total	EMEA	APAC	USA
<b>Backup</b>	77.8 %	80.1 %	74.7 %	72.9 %
<b>Email</b>	73.2 %	75.2 %	71.5 %	65.5 %
<b>Server</b>	65.1 %	66.3 %	62.2 %	67.7 %
<b>File sharing/collaboration</b>	61.5 %	58.1 %	67.5 %	62.0 %
<b>CRM</b>	57.4 %	57.4 %	56.6 %	61.1 %
<b>Website</b>	54.2 %	53.0 %	56.2 %	54.6 %
<b>Webconferencing</b>	43.1 %	39.9 %	47.4 %	49.3 %
<b>E-commerce</b>	36.1 %	31.3 %	42.5 %	46.7 %
<b>Base</b>	<b>2908</b>	<b>1743</b>	<b>936</b>	<b>229</b>

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Which of the following IT tools do you have hosted?

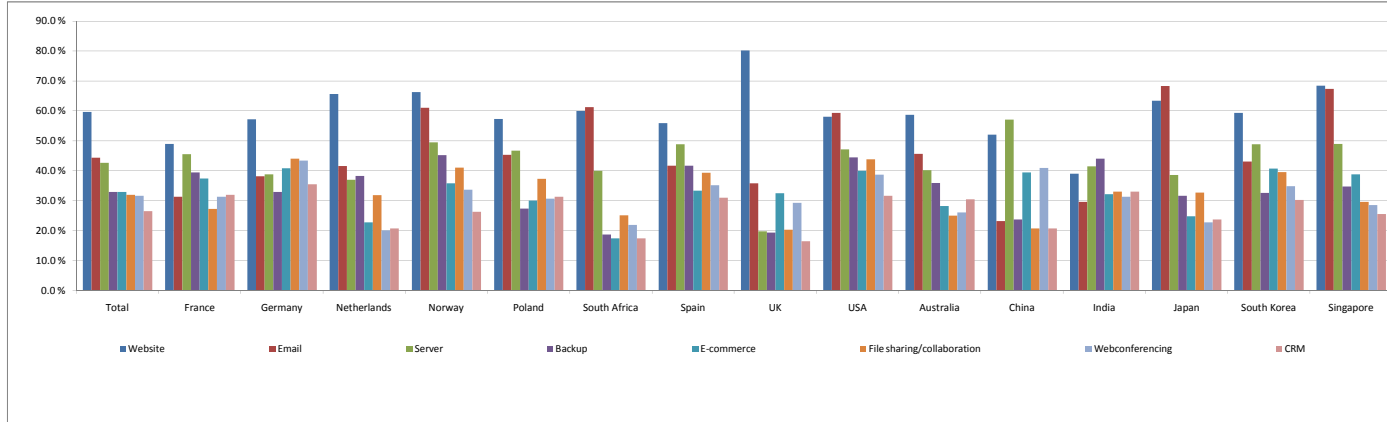
Base: Only respondents who answered they have at least one of the following IT tools hosted

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
<b>Website</b>	59.6 %	49.0 %	57.2 %	65.6 %	66.3 %	57.3 %	60.0 %	56.0 %	80.2 %	58.1 %	58.7 %	52.0 %	39.0 %	63.4 %	59.3 %	68.4 %
<b>Email</b>	44.3 %	31.3 %	38.2 %	41.6 %	61.1 %	45.3 %	61.3 %	41.7 %	35.8 %	59.4 %	45.7 %	23.2 %	29.7 %	68.3 %	43.0 %	67.3 %
<b>Server</b>	42.6 %	45.6 %	38.8 %	37.0 %	49.3 %	46.7 %	40.0 %	48.8 %	19.8 %	47.1 %	40.2 %	57.1 %	41.5 %	38.6 %	48.8 %	49.0 %
<b>Backup</b>	33.0 %	39.5 %	32.9 %	38.3 %	45.3 %	27.3 %	18.7 %	41.7 %	19.3 %	44.5 %	35.9 %	23.7 %	44.1 %	31.7 %	32.6 %	34.7 %
<b>E-commerce</b>	32.9 %	37.4 %	40.8 %	22.7 %	35.8 %	30.0 %	17.4 %	33.3 %	32.5 %	40.0 %	28.3 %	39.4 %	32.2 %	24.8 %	40.7 %	38.8 %
<b>File sharing/collaboration</b>	32.0 %	27.2 %	44.1 %	31.8 %	41.1 %	37.3 %	25.2 %	39.3 %	20.3 %	43.9 %	25.0 %	20.7 %	33.1 %	32.7 %	39.5 %	29.6 %
<b>Webconferencing</b>	31.7 %	31.3 %	43.4 %	20.1 %	33.7 %	30.7 %	21.9 %	35.1 %	29.2 %	38.7 %	26.1 %	40.9 %	31.4 %	22.8 %	34.9 %	28.6 %
<b>CRM</b>	26.5 %	32.0 %	35.5 %	20.8 %	26.3 %	31.3 %	17.4 %	31.0 %	16.5 %	31.6 %	30.4 %	20.7 %	33.1 %	30.2 %	30.2 %	25.5 %
<b>Base</b>	<b>2081</b>	<b>147</b>	<b>152</b>	<b>154</b>	<b>95</b>	<b>150</b>	<b>155</b>	<b>168</b>	<b>212</b>	<b>155</b>	<b>92</b>	<b>198</b>	<b>118</b>	<b>101</b>	<b>86</b>	<b>98</b>

Commentary

Of the respondents using at least one hosted service, over half have a website hosted.

Only just over a quarter of respondents using hosted services, have a hosted CRM tool, making it the least used hosted tool.



Base: Only respondents who answered they have at least one of the following IT tools hosted

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
<b>Website</b>	59.6 %	58.9 %	62.0 %	60.7 %	60.2 %	56.1 %	62.3 %	57.4 %	60.6 %	49.4 %	67.7 %
<b>Email</b>	44.3 %	40.7 %	40.2 %	44.9 %	47.9 %	45.8 %	38.4 %	42.6 %	52.1 %	37.7 %	57.0 %
<b>Server</b>	42.6 %	45.8 %	39.3 %	43.0 %	43.0 %	37.4 %	49.1 %	45.2 %	46.8 %	50.8 %	36.6 %
<b>Backup</b>	33.0 %	34.1 %	29.6 %	29.8 %	31.3 %	31.8 %	39.6 %	34.2 %	41.5 %	33.8 %	39.8 %
<b>E-commerce</b>	32.9 %	36.0 %	31.8 %	38.2 %	27.0 %	36.4 %	37.1 %	26.5 %	35.1 %	36.4 %	24.7 %
<b>File sharing/collaboration</b>	32.0 %	30.8 %	29.0 %	34.6 %	34.5 %	33.6 %	33.3 %	27.7 %	29.8 %	27.3 %	33.3 %
<b>Webconferencing</b>	31.7 %	35.0 %	35.2 %	25.4 %	33.2 %	34.6 %	28.9 %	18.1 %	33.0 %	48.1 %	25.8 %
<b>CRM</b>	26.5 %	27.1 %	25.2 %	25.0 %	23.3 %	28.0 %	31.4 %	26.5 %	25.5 %	40.3 %	22.6 %
<b>Base</b>	<b>2081</b>	<b>214</b>	<b>321</b>	<b>272</b>	<b>374</b>	<b>321</b>	<b>159</b>	<b>155</b>	<b>94</b>	<b>77</b>	<b>93</b>

Base: Only respondents who answered they have at least one of the following IT tools hosted

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
<b>Website</b>	59.6 %	65.3 %	58.8 %	56.6 %	55.0 %	63.7 %	57.5 %	63.7 %	55.3 %
<b>Email</b>	44.3 %	61.9 %	47.3 %	43.4 %	39.8 %	39.5 %	34.2 %	38.7 %	37.3 %
<b>Server</b>	42.6 %	42.8 %	41.8 %	41.3 %	37.6 %	41.4 %	48.1 %	47.0 %	49.3 %
<b>Backup</b>	33.0 %	25.3 %	33.8 %	34.3 %	32.0 %	34.0 %	36.8 %	39.3 %	34.7 %
<b>E-commerce</b>	32.9 %	24.2 %	29.3 %	31.5 %	35.7 %	34.4 %	36.4 %	41.1 %	41.3 %
<b>File sharing/collaboration</b>	32.0 %	29.7 %	32.8 %	33.9 %	30.4 %	30.9 %	33.3 %	36.3 %	30.7 %
<b>Webconferencing</b>	31.7 %	20.3 %	27.3 %	28.7 %	32.6 %	37.9 %	41.2 %	37.5 %	40.0 %
<b>CRM</b>	26.5 %	18.1 %	21.2 %	27.3 %	30.7 %	30.5 %	32.0 %	26.2 %	32.0 %
<b>Base</b>	<b>2081</b>	<b>360</b>	<b>311</b>	<b>286</b>	<b>322</b>	<b>256</b>	<b>228</b>	<b>168</b>	<b>150</b>

Base: Only respondents who answered they have at least one of the following IT tools hosted

	Total	EMEA	APAC	USA
<b>Website</b>	59.6 %	62.1 %	55.6 %	58.1 %
<b>Email</b>	44.3 %	43.4 %	42.6 %	59.4 %
<b>Server</b>	42.6 %	39.4 %	47.3 %	47.1 %
<b>Backup</b>	33.0 %	31.7 %	32.6 %	44.5 %
<b>E-commerce</b>	32.9 %	31.1 %	34.6 %	40.0 %
<b>File sharing/collaboration</b>	32.0 %	32.4 %	28.7 %	43.9 %
<b>Webconferencing</b>	31.7 %	30.5 %	32.2 %	38.7 %
<b>CRM</b>	26.5 %	25.9 %	26.4 %	31.6 %
<b>Base</b>	<b>2081</b>	<b>1233</b>	<b>693</b>	<b>155</b>

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Have you considered using hosted IT services for any of the following IT tools?

Base: Only asked of respondents who do not have at least one of the following IT tools hosted

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
<b>Email</b>	31.7 %	38.5 %	36.9 %	15.8 %	20.3 %	32.3 %	30.5 %	26.8 %	30.0 %	35.4 %	24.3 %	40.9 %	44.9 %	24.8 %	40.4 %	31.0 %
<b>Backup</b>	30.4 %	33.9 %	33.1 %	17.4 %	12.3 %	25.4 %	29.7 %	28.9 %	37.6 %	39.7 %	26.4 %	44.5 %	27.2 %	28.2 %	33.1 %	26.9 %
<b>Website</b>	25.1 %	31.4 %	28.7 %	10.4 %	14.5 %	26.2 %	31.7 %	16.7 %	14.4 %	33.8 %	25.7 %	39.4 %	31.6 %	16.8 %	28.5 %	24.8 %
<b>File sharing/collaboration</b>	23.7 %	31.4 %	17.4 %	11.2 %	12.3 %	23.8 %	16.5 %	21.3 %	17.6 %	30.8 %	17.4 %	40.9 %	29.1 %	18.8 %	35.8 %	31.7 %
<b>Server</b>	22.8 %	21.3 %	33.1 %	11.2 %	11.8 %	20.6 %	18.9 %	20.9 %	20.8 %	27.8 %	18.4 %	35.0 %	22.8 %	18.8 %	29.8 %	25.5 %
<b>E-commerce</b>	21.5 %	23.4 %	17.4 %	10.8 %	13.0 %	17.3 %	25.3 %	23.0 %	21.8 %	27.0 %	20.1 %	42.9 %	22.4 %	6.0 %	17.9 %	22.8 %
<b>Webconferencing</b>	19.6 %	28.0 %	17.8 %	5.4 %	8.7 %	22.2 %	16.8 %	18.4 %	18.0 %	26.2 %	18.1 %	37.8 %	20.9 %	8.7 %	13.9 %	22.1 %
<b>CRM</b>	18.7 %	18.4 %	14.8 %	9.1 %	6.5 %	15.3 %	12.4 %	12.1 %	20.0 %	21.5 %	11.8 %	51.6 %	32.9 %	8.7 %	17.9 %	17.9 %
<b>None of these</b>	24.3 %	14.2 %	20.3 %	58.5 %	61.4 %	29.4 %	28.5 %	18.4 %	21.2 %	18.1 %	38.2 %	2.0 %	7.0 %	38.9 %	15.9 %	22.1 %
<b>Base</b>	3193	251	251	251	150	255	250	253	254	250	151	256	161	156	154	150

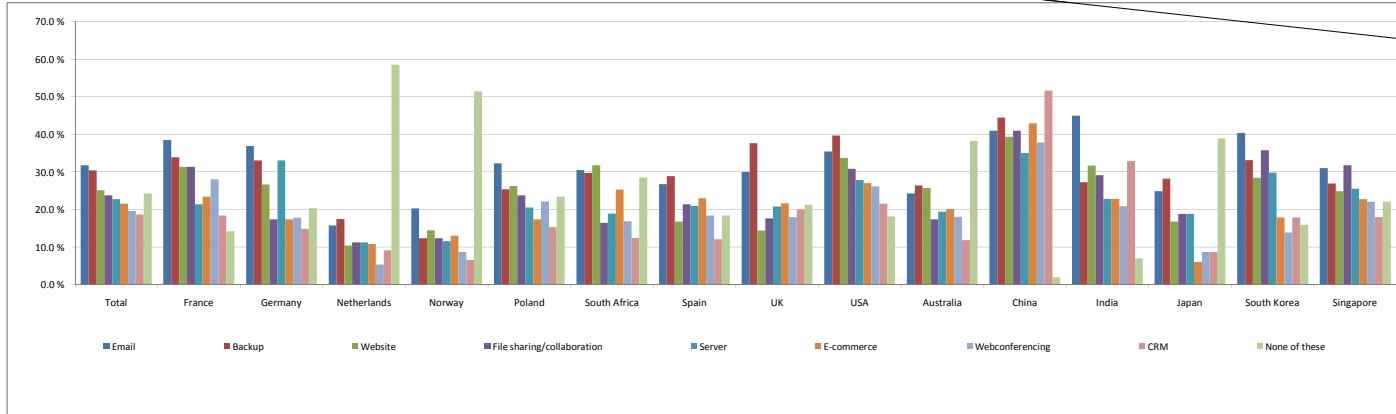
Commentary

Almost a third of the respondents who don't currently use a hosted email tool, have considered doing so, making it the most considered hosted tool, followed closely by backup tools.

Almost half of respondents in India have considered using a hosted email tool, the highest proportion to have done so, whereas the Netherlands has the lowest proportion of respondents to have done so.

Respondents in China are the most likely to have considered using hosted services for four different IT tools: backup, filesharing/collaboration, e-commerce and CRM.

More than half of the respondents in the Netherlands and Norway have not considered using hosted services for any of the tools which they do not currently have hosted.



Base: Only asked of respondents who do not have at least one of the following IT tools hosted

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
<b>Email</b>	31.7 %	33.8 %	35.3 %	30.4 %	28.7 %	31.7 %	35.6 %	32.8 %	29.1 %	38.2 %	22.6 %
<b>Backup</b>	30.4 %	31.8 %	33.8 %	27.5 %	33.5 %	26.7 %	29.3 %	34.4 %	29.7 %	43.8 %	15.9 %
<b>Website</b>	25.1 %	25.1 %	24.1 %	25.9 %	27.5 %	24.8 %	24.7 %	26.3 %	23.6 %	32.6 %	15.9 %
<b>File sharing/collaboration</b>	23.7 %	24.1 %	28.6 %	20.0 %	25.0 %	23.3 %	25.5 %	23.6 %	20.3 %	36.0 %	10.4 %
<b>Server</b>	22.8 %	21.4 %	23.7 %	23.8 %	23.8 %	23.1 %	23.4 %	23.2 %	27.7 %	22.5 %	9.8 %
<b>E-commerce</b>	21.5 %	19.7 %	24.9 %	22.1 %	20.3 %	22.5 %	20.5 %	22.4 %	20.3 %	29.2 %	11.6 %
<b>Webconferencing</b>	19.6 %	24.7 %	22.2 %	17.9 %	19.7 %	18.3 %	18.0 %	22.4 %	12.2 %	25.8 %	12.2 %
<b>CRM</b>	18.7 %	27.8 %	19.6 %	17.4 %	18.7 %	20.6 %	18.0 %	15.4 %	11.5 %	24.7 %	6.1 %
<b>None of these</b>	24.3 %	17.7 %	20.6 %	28.2 %	23.2 %	24.4 %	21.8 %	22.0 %	23.8 %	11.2 %	54.9 %
<b>Base</b>	3193	313	481	441	531	491	248	265	156	95	171

Base: Only asked of respondents who do not have at least one of the following IT tools hosted

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
<b>Email</b>	31.7 %	22.5 %	29.0 %	32.1 %	35.3 %	32.2 %	38.3 %	35.6 %	41.4 %
<b>Backup</b>	30.4 %	26.0 %	24.7 %	29.5 %	32.8 %	32.0 %	32.1 %	37.0 %	41.0 %
<b>Website</b>	25.1 %	22.5 %	20.1 %	28.5 %	29.1 %	23.1 %	24.7 %	28.2 %	30.5 %
<b>File sharing/collaboration</b>	23.7 %	15.4 %	20.1 %	24.7 %	25.0 %	25.9 %	29.6 %	28.7 %	33.3 %
<b>Server</b>	22.8 %	14.2 %	19.5 %	25.2 %	24.5 %	24.5 %	25.9 %	32.4 %	27.1 %
<b>E-commerce</b>	21.5 %	20.0 %	17.1 %	20.0 %	20.6 %	25.4 %	23.1 %	26.9 %	25.7 %
<b>Webconferencing</b>	19.6 %	11.8 %	18.6 %	18.8 %	20.9 %	24.6 %	19.1 %	29.2 %	24.8 %
<b>CRM</b>	18.7 %	9.8 %	15.9 %	18.8 %	15.8 %	21.6 %	22.2 %	34.3 %	29.5 %
<b>None of these</b>	24.3 %	36.3 %	29.2 %	23.3 %	20.9 %	18.8 %	19.4 %	15.3 %	15.2 %
<b>Base</b>	3193	615	489	434	454	412	341	228	220

Base: Only asked of respondents who do not have at least one of the following IT tools hosted

	Total	EMEA	APAC	USA
<b>Email</b>	31.7 %	29.3 %	35.3 %	35.4 %
<b>Backup</b>	30.4 %	28.2 %	32.5 %	39.7 %
<b>Website</b>	25.1 %	21.9 %	29.1 %	33.8 %
<b>File sharing/collaboration</b>	23.7 %	19.3 %	30.3 %	30.8 %
<b>Server</b>	22.8 %	20.2 %	26.3 %	27.8 %
<b>E-commerce</b>	21.5 %	19.3 %	24.3 %	27.0 %
<b>Webconferencing</b>	19.6 %	17.4 %	22.1 %	26.2 %
<b>CRM</b>	18.7 %	14.0 %	26.6 %	21.5 %
<b>None of these</b>	24.3 %	28.3 %	18.5 %	18.1 %
<b>Base</b>	3193	1915	1028	250

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Have you considered having any of the following IT tools onsite?

Base: Only asked of respondents who do not have at least one of the following IT tools onsite

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Website	23.8%	17.1%	23.3%	13.8%	10.0%	18.6%	38.1%	26.5%	27.9%	29.5%	23.8%	36.8%	20.4%	11.5%	25.7%	24.0%
E-commerce	18.6%	23.4%	17.5%	8.2%	15.0%	7.8%	23.4%	24.6%	19.8%	18.4%	13.9%	33.2%	15.5%	14.2%	18.4%	22.5%
Email	17.6%	12.7%	19.3%	4.3%	2.1%	19.9%	22.1%	22.7%	12.6%	33.2%	17.2%	15.7%	22.5%	13.5%	19.1%	27.9%
Webconferencing	16.7%	18.5%	21.5%	3.9%	9.3%	5.6%	15.2%	19.9%	17.8%	23.0%	21.3%	35.0%	14.1%	10.1%	16.2%	17.1%
Server	16.2%	21.0%	15.2%	6.0%	4.3%	12.6%	15.2%	19.0%	9.7%	19.4%	14.8%	39.9%	19.0%	8.8%	16.9%	17.1%
File sharing/collaboration	15.3%	13.2%	17.0%	4.7%	8.6%	11.7%	16.9%	19.9%	16.6%	20.7%	17.2%	17.9%	18.3%	7.4%	21.3%	18.6%
Backup	15.0%	19.0%	14.8%	6.0%	5.0%	10.8%	14.9%	24.2%	11.3%	25.3%	14.8%	18.8%	13.4%	12.2%	16.2%	17.8%
CRM	11.6%	7.8%	12.6%	6.0%	7.9%	4.8%	12.6%	12.3%	14.6%	9.7%	15.6%	16.6%	23.9%	6.8%	14.0%	14.0%
None of these	31.1%	20.5%	25.6%	66.4%	57.9%	46.9%	25.5%	18.0%	33.6%	20.3%	33.6%	3.6%	12.0%	50.7%	26.5%	26.4%
Base	2837	205	223	232	140	231	231	211	247	217	122	223	142	148	136	129

Commentary

Almost a quarter of the respondents who don't have their website onsite, have considered doing so, making this the tool most considered as an onsite tool.

CRM is the tool considered for onsite use, as it was for hosted use, indicating that respondents who don't have currently have it, have not considered doing so - whatever the form of the tool.

As with the consideration of hosted services, more than half of the respondents in the Netherlands and Norway have not considered onsite tools for any which they do not currently have, making them the two countries least likely to consider change. In regard to considering onsite tools, these two countries are joined by Japan.



Base: Only asked of respondents who do not have at least one of the following IT tools onsite

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Website	23.8%	23.7%	26.8%	24.6%	24.6%	22.4%	19.0%	22.9%	31.7%	21.3%	18.0%
E-commerce	18.6%	17.4%	21.7%	21.0%	15.6%	18.2%	16.8%	23.4%	13.0%	25.8%	8.1%
Email	17.6%	23.0%	18.2%	16.7%	15.6%	19.2%	14.6%	17.7%	20.4%	21.3%	11.2%
Webconferencing	16.7%	22.2%	21.0%	13.1%	17.0%	15.6%	15.0%	15.6%	16.9%	23.6%	6.8%
Server	16.2%	19.6%	17.2%	15.9%	15.2%	14.6%	18.1%	17.3%	16.2%	25.8%	5.6%
File sharing/collaboration	15.3%	13.3%	19.1%	14.9%	17.9%	13.9%	15.5%	14.7%	12.7%	14.6%	8.1%
Backup	15.0%	17.8%	16.1%	12.3%	15.0%	13.1%	18.1%	16.5%	19.7%	16.9%	7.5%
CRM	11.6%	14.4%	12.6%	9.5%	11.5%	11.4%	14.6%	10.8%	7.7%	23.6%	3.7%
None of these	31.1%	25.9%	25.4%	34.9%	31.2%	30.7%	32.3%	24.7%	31.0%	22.5%	59.0%
Base	2837	270	429	390	487	411	226	231	142	89	161

Base: Only asked of respondents who do not have at least one of the following IT tools onsite

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Website	23.8%	23.3%	23.0%	22.6%	24.9%	20.0%	25.5%	28.6%	27.2%
E-commerce	18.6%	16.0%	17.3%	19.9%	17.0%	19.4%	20.7%	21.4%	22.5%
Email	17.6%	16.0%	15.7%	16.9%	20.6%	16.8%	20.7%	19.9%	16.8%
Webconferencing	16.7%	9.1%	10.5%	15.9%	17.0%	21.4%	25.5%	25.5%	24.6%
Server	16.2%	10.5%	17.1%	14.4%	16.5%	14.5%	19.3%	24.0%	24.6%
File sharing/collaboration	15.3%	11.7%	14.1%	16.4%	18.3%	16.2%	16.9%	17.9%	13.1%
Backup	15.0%	11.0%	13.0%	14.4%	15.5%	15.1%	19.0%	22.4%	16.3%
CRM	11.6%	7.4%	8.7%	10.9%	15.0%	14.8%	13.8%	12.2%	15.7%
None of these	31.1%	43.3%	35.5%	29.6%	26.6%	29.3%	24.1%	19.9%	21.5%
Base	2837	580	439	402	394	345	290	196	191

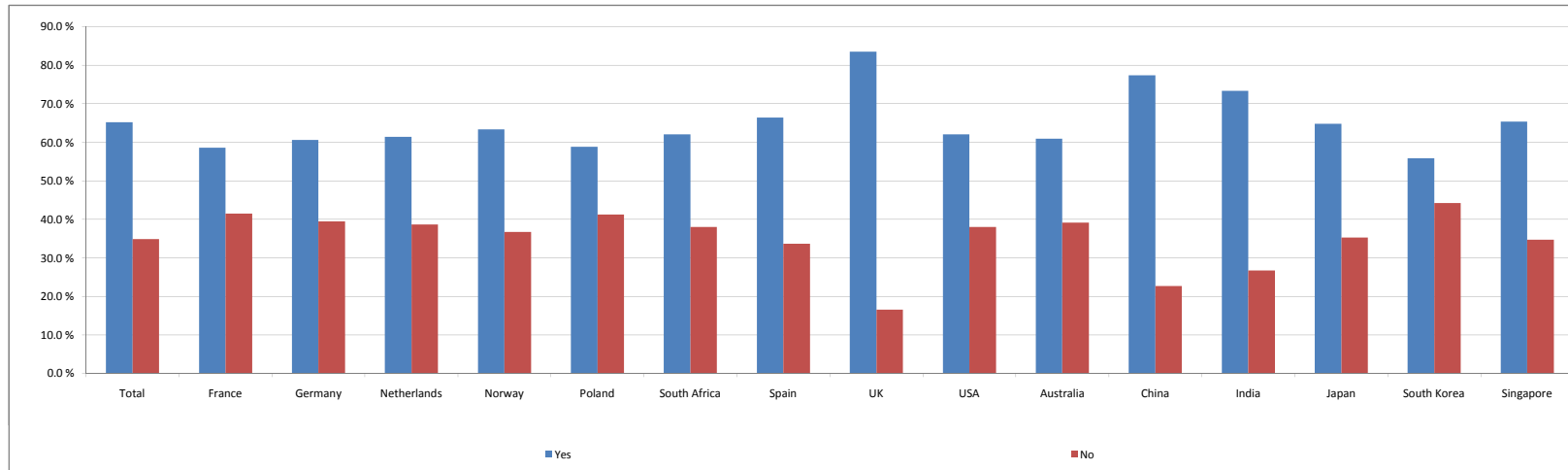
Base: Only asked of respondents who do not have at least one of the following IT tools onsite

	Total	EMEA	APAC	USA
Website	23.8%	22.6%	24.8%	29.5%
E-commerce	18.6%	17.4%	20.9%	18.4%
Email	17.6%	15.0%	18.9%	33.2%
Webconferencing	16.7%	14.1%	20.3%	23.0%
Server	16.2%	13.1%	21.3%	19.4%
File sharing/collaboration	15.3%	13.8%	16.8%	20.7%
Backup	15.0%	13.3%	15.8%	25.3%
CRM	11.6%	9.9%	15.2%	9.7%
None of these	31.1%	36.5%	23.4%	20.3%
Base	2837	1720	900	217

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Do you use hosted IT services?

Base: Asked to all respondents	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	65.2 %	58.6 %	60.6 %	61.4 %	63.3 %	58.8 %	62.0 %	66.4 %	83.5 %	62.0 %	60.9 %	77.3 %	73.3 %	64.7 %	55.8 %	65.3 %
No	34.8 %	41.4 %	39.4 %	38.6 %	36.7 %	41.2 %	38.0 %	33.6 %	16.5 %	38.0 %	39.1 %	22.7 %	26.7 %	35.3 %	44.2 %	34.7 %
Base	3193	251	251	251	150	255	250	253	254	250	151	256	161	156	154	150



Commentary

Almost two thirds of respondents are using hosted IT services. Respondents in the UK are most likely to be doing so, whilst those in South Korea are least likely to.

There are however no countries where are less respondents using hosted services than not.

Base: Asked to all respondents	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	65.2 %	68.4 %	66.7 %	61.7 %	70.4 %	65.4 %	64.1 %	58.5 %	60.3 %	81.1 %	54.4 %
No	34.8 %	31.6 %	33.3 %	38.3 %	29.6 %	34.6 %	35.9 %	41.5 %	39.7 %	18.9 %	45.6 %
Base	3193	313	481	441	531	491	248	265	156	95	171

Base: Asked to all respondents	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Yes	65.2 %	58.5 %	63.6 %	65.9 %	70.9 %	62.1 %	66.9 %	73.7 %	68.2 %
No	34.8 %	41.5 %	36.4 %	34.1 %	29.1 %	37.9 %	33.1 %	26.3 %	31.8 %
Base	3193	615	489	434	454	412	341	228	220

Base: Asked to all respondents	Total	EMEA	APAC	USA
Yes	65.2 %	64.4 %	67.4 %	62.0 %
No	34.8 %	35.6 %	32.6 %	38.0 %
Base	3193	1915	1028	250

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Have you considered using hosted IT services?

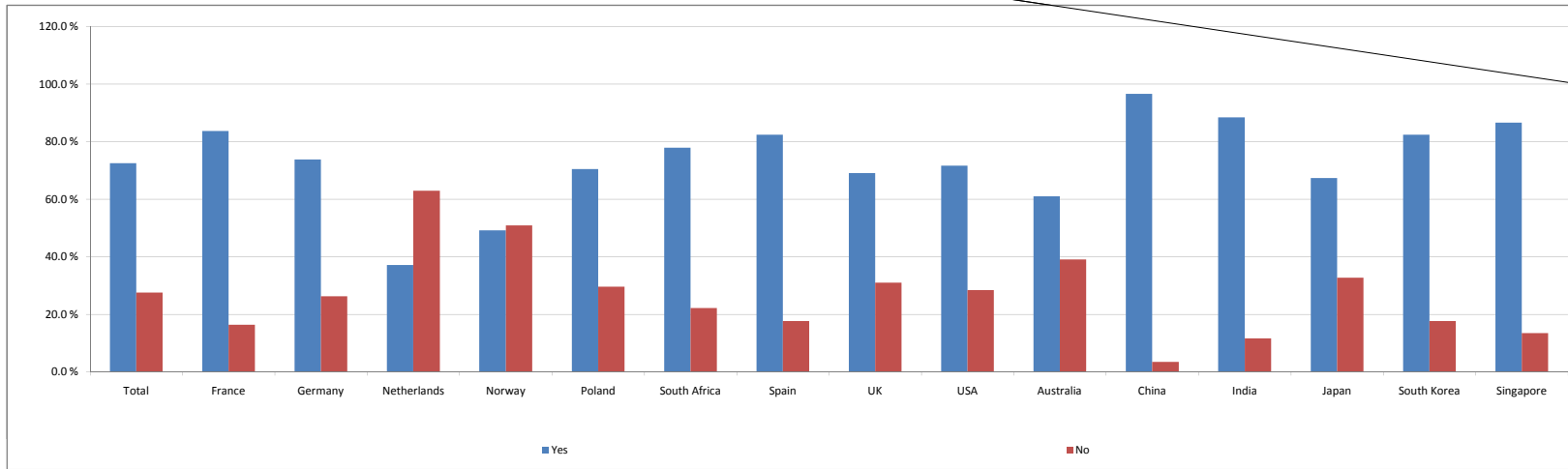
Base: Only asked of respondents who currently don't use hosted IT services

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	72.5 %	83.7 %	73.7 %	37.1 %	49.1 %	70.5 %	77.9 %	82.4 %	69.0 %	71.6 %	61.0 %	96.6 %	88.4 %	67.3 %	82.4 %	86.5 %
No	27.5 %	16.3 %	26.3 %	62.9 %	50.9 %	29.5 %	22.1 %	17.6 %	31.0 %	28.4 %	39.0 %	3.4 %	11.6 %	32.7 %	17.6 %	13.5 %
Base	1112	104	99	97	55	105	95	85	42	95	59	58	43	55	68	52

Commentary

Almost three quarters of respondents not currently using hosted services have considered doing so, with respondents in China the most likely to have done so, where over 95% of them have done.

As discussed on previous sheets (23 & 24), respondents in Netherlands and Norway are the least likely to have considered hosted services.



Base: Only asked of respondents who currently don't use hosted IT services

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	72.5 %	76.8 %	78.8 %	66.9 %	74.5 %	71.2 %	74.2 %	80.0 %	71.0 %	100.0 %	47.4 %
No	27.5 %	23.2 %	21.3 %	33.1 %	25.5 %	28.8 %	25.8 %	20.0 %	29.0 %	0.0 %	52.6 %
Base	1112	99	160	169	157	170	89	110	62	18	78

Base: Only asked of respondents who currently don't use hosted IT services

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Yes	72.5 %	63.5 %	68.5 %	70.9 %	79.5 %	79.5 %	77.9 %	81.7 %	72.9 %
No	27.5 %	36.5 %	31.5 %	29.1 %	20.5 %	20.5 %	22.1 %	18.3 %	27.1 %
Base	1112	255	178	148	132	156	113	60	70

Base: Only asked of respondents who currently don't use hosted IT services

	Total	EMEA	APAC	USA
Yes	72.5 %	68.9 %	80.0 %	71.6 %
No	27.5 %	31.1 %	20.0 %	28.4 %
Base	1112	682	335	95

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What interested you in hosted services?

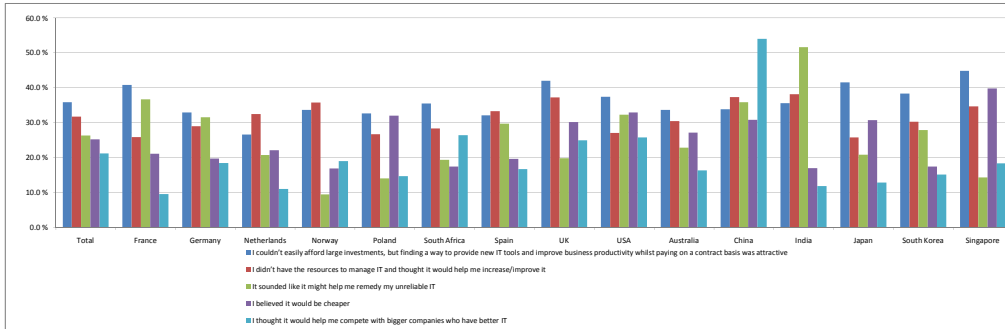
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
I couldn't easily afford large investments, but finding a way to provide new IT tools and improve business productivity whilst paying on a contract basis was attractive	35.9%	40.8%	32.9%	26.6%	33.7%	32.7%	35.5%	32.1%	42.0%	37.4%	33.7%	33.8%	35.6%	41.6%	38.4%	44.9%
I didn't have the resources to manage IT and thought it would help me increase/improve it	31.7%	25.9%	28.9%	32.5%	35.8%	26.7%	28.4%	33.3%	37.3%	27.1%	30.4%	37.4%	38.1%	25.7%	30.2%	34.7%
It sounded like it might help me remedy my unreliable IT	26.3%	36.7%	31.6%	20.8%	8.5%	14.0%	19.4%	29.8%	19.8%	32.3%	22.8%	35.9%	51.7%	20.8%	27.5%	14.3%
I believed it would be cheaper	25.2%	21.1%	19.7%	22.1%	16.8%	32.0%	17.4%	19.6%	39.2%	32.9%	27.2%	30.8%	16.9%	30.7%	17.4%	39.8%
I thought it would help me compete with bigger companies who have better IT	21.2%	9.5%	18.4%	11.0%	18.9%	14.7%	26.5%	16.7%	25.0%	25.8%	16.3%	54.0%	11.9%	12.9%	15.1%	18.4%
Base	2081	147	152	154	95	150	155	168	212	155	92	198	118	101	89	88

Commentary

Over a third of respondents made this the most selected answer, and this proportion rises to almost half in Singapore.

More than half of the respondents in India thought hosted services would remedy their unreliable IT.

More than half of the Chinese respondents thought hosted services would help them compete with bigger companies who have better IT, a proportion more than double that of the total respondents.



	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
I couldn't easily afford large investments, but finding a way to provide new IT tools and improve business productivity whilst paying on a contract basis was attractive	35.9%	35.5%	30.5%	29.8%	43.0%	40.5%	34.6%	32.9%	34.0%	40.3%	34.4%
I didn't have the resources to manage IT and thought it would help me increase/improve it	31.7%	31.8%	29.6%	32.4%	32.9%	30.2%	27.0%	34.2%	35.1%	40.3%	31.2%
It sounded like it might help me remedy my unreliable IT	26.3%	25.2%	29.3%	23.9%	25.7%	23.7%	34.6%	21.9%	31.9%	33.8%	18.3%
I believed it would be cheaper	25.2%	25.7%	29.6%	26.1%	22.5%	28.3%	20.8%	24.5%	22.3%	20.9%	22.6%
I thought it would help me compete with bigger companies who have better IT	21.2%	25.2%	28.3%	20.2%	18.7%	20.6%	13.2%	23.9%	18.1%	26.0%	10.8%
Base	2081	214	321	272	374	321	159	155	84	77	93

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
I couldn't easily afford large investments, but finding a way to provide new IT tools and improve business productivity whilst paying on a contract basis was attractive	35.9%	39.4%	38.6%	32.5%	33.2%	34.4%	31.1%	37.5%	42.0%
I didn't have the resources to manage IT and thought it would help me increase/improve it	31.7%	29.4%	36.3%	30.4%	31.7%	28.5%	32.5%	34.5%	31.3%
It sounded like it might help me remedy my unreliable IT	26.3%	17.8%	20.6%	29.0%	28.6%	25.8%	31.1%	31.0%	37.3%
I believed it would be cheaper	25.2%	23.1%	23.8%	25.9%	26.4%	25.0%	24.6%	25.0%	31.3%
I thought it would help me compete with bigger companies who have better IT	21.2%	17.2%	16.1%	20.6%	19.6%	20.7%	28.1%	25.6%	31.3%
Base	2081	390	311	296	322	256	228	168	150

	Total	EMEA	APAC	USA
I couldn't easily afford large investments, but finding a way to provide new IT tools and improve business productivity whilst paying on a contract basis was attractive	35.9%	34.9%	37.4%	37.4%
I didn't have the resources to manage IT and thought it would help me increase/improve it	31.7%	31.2%	33.6%	27.1%
It sounded like it might help me remedy my unreliable IT	26.3%	23.2%	30.6%	32.3%
I believed it would be cheaper	25.2%	23.0%	27.6%	32.9%
I thought it would help me compete with bigger companies who have better IT	21.2%	17.9%	26.0%	25.8%
Base	2081	1233	693	155

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Which of these factors have prevented the complete implementation of hosted services across your organisation?

Base: Only asked of respondents currently using hosted services

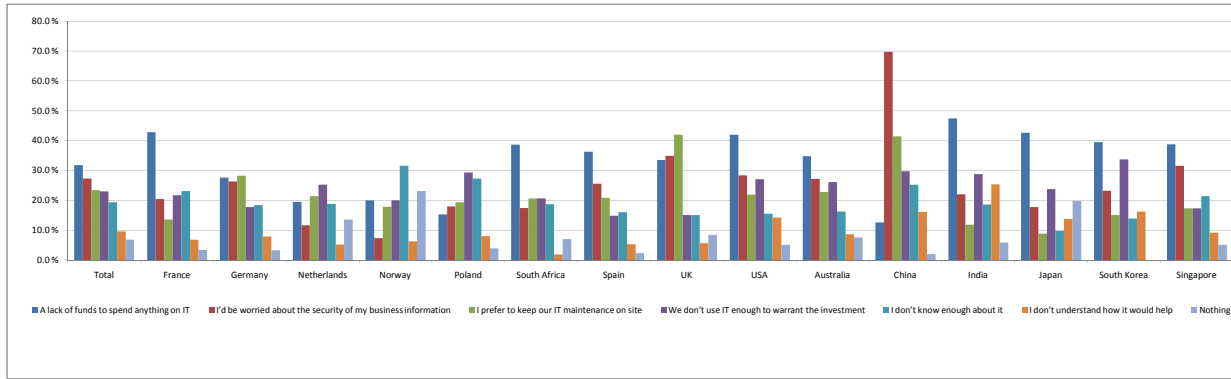
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
A lack of funds to spend anything on IT	31.8 %	42.9 %	27.6 %	19.5 %	20.0 %	15.3 %	38.7 %	36.3 %	33.5 %	41.9 %	34.8 %	12.6 %	47.5 %	42.6 %	39.5 %	38.8 %
I'd be worried about the security of my business information	27.3 %	20.4 %	26.3 %	11.7 %	7.4 %	18.0 %	17.4 %	25.6 %	34.9 %	28.4 %	27.2 %	69.7 %	22.0 %	17.8 %	23.3 %	31.6 %
I prefer to keep our IT maintenance on site	23.5 %	13.6 %	28.3 %	21.4 %	17.9 %	19.3 %	20.6 %	20.8 %	42.0 %	21.9 %	22.8 %	41.4 %	11.9 %	8.9 %	15.1 %	17.3 %
We don't use IT enough to warrant the investment	23.0 %	21.8 %	17.8 %	25.3 %	20.0 %	29.3 %	20.6 %	14.9 %	15.1 %	27.1 %	26.1 %	29.8 %	28.8 %	23.8 %	33.7 %	17.3 %
I don't know enough about it	19.4 %	23.1 %	18.4 %	18.8 %	31.6 %	27.3 %	18.7 %	16.1 %	15.1 %	15.5 %	16.3 %	25.3 %	18.6 %	9.9 %	14.0 %	21.4 %
I don't understand how it would help	9.7 %	6.8 %	7.9 %	5.2 %	6.3 %	8.0 %	1.9 %	5.4 %	5.7 %	14.2 %	8.7 %	16.2 %	25.4 %	13.9 %	16.3 %	9.2 %
Nothing	6.9 %	3.4 %	3.3 %	13.6 %	23.2 %	4.0 %	7.1 %	2.4 %	8.5 %	5.2 %	7.6 %	2.0 %	5.9 %	19.8 %	0.0 %	5.1 %
Base	2081	147	152	154	95	150	155	168	212	155	92	198	118	101	86	88

Commentary

The most likely factor in preventing complete implementation of hosted services was "a lack of funds to spend anything on IT", reported by almost a third of the total respondents. In India, almost half of respondents cited this as a factor.

In China, the most cited factor was security worries, reported by almost seven in ten respondents. In comparison only just over one in ten respondents cited the lack of funds that the third of total respondents had.

There were no South Koreans currently using hosted services who said nothing would prevent them completely implementing hosted services, in contrast to almost one fifth of Japanese respondents.



Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prog. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
A lack of funds to spend anything on IT	31.8 %	30.8 %	32.1 %	29.4 %	30.5 %	33.3 %	38.4 %	29.7 %	38.3 %	31.2 %	26.9 %
I'd be worried about the security of my business information	27.3 %	36.9 %	31.5 %	16.9 %	28.6 %	29.0 %	20.1 %	29.0 %	30.9 %	35.1 %	9.7 %
I prefer to keep our IT maintenance on site	23.5 %	24.8 %	29.0 %	21.3 %	20.1 %	31.2 %	19.5 %	20.6 %	13.8 %	23.4 %	15.1 %
We don't use IT enough to warrant the investment	23.0 %	22.4 %	23.4 %	22.1 %	23.0 %	19.6 %	22.0 %	25.8 %	31.9 %	26.0 %	23.7 %
I don't know enough about it	19.4 %	17.8 %	18.1 %	23.9 %	18.4 %	14.0 %	22.0 %	22.6 %	17.0 %	26.0 %	24.7 %
I don't understand how it would help	9.7 %	8.9 %	12.8 %	7.7 %	10.2 %	8.7 %	10.1 %	7.1 %	10.6 %	16.9 %	4.3 %
Nothing	6.9 %	4.7 %	4.4 %	5.9 %	8.0 %	8.7 %	6.9 %	6.5 %	3.2 %	6.5 %	17.2 %
Base	2081	214	321	272	374	321	159	155	94	77	93

Base: Only asked of respondents currently using hosted services

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
A lack of funds to spend anything on IT	31.8 %	35.3 %	33.4 %	32.5 %	31.4 %	31.3 %	30.7 %	26.8 %	28.0 %
I'd be worried about the security of my business information	27.3 %	13.3 %	24.4 %	25.9 %	27.0 %	30.1 %	34.6 %	35.1 %	45.3 %
I prefer to keep our IT maintenance on site	23.5 %	14.4 %	23.8 %	22.4 %	24.8 %	25.8 %	28.5 %	25.6 %	29.3 %
We don't use IT enough to warrant the investment	23.0 %	24.7 %	24.1 %	24.8 %	23.9 %	21.5 %	18.9 %	20.2 %	23.3 %
I don't know enough about it	19.4 %	25.0 %	21.5 %	20.3 %	14.0 %	14.1 %	15.8 %	25.6 %	19.3 %
I don't understand how it would help	9.7 %	7.2 %	9.6 %	10.1 %	8.4 %	10.5 %	11.4 %	9.5 %	13.3 %
Nothing	6.9 %	8.9 %	8.0 %	6.6 %	6.8 %	5.9 %	4.4 %	6.0 %	6.7 %
Base	2081	360	311	286	322	256	228	168	150

Base: Only asked of respondents currently using hosted services

	Total	EMEA	APAC	USA
A lack of funds to spend anything on IT	31.8 %	29.9 %	32.9 %	41.9 %
I'd be worried about the security of my business information	27.3 %	21.6 %	37.2 %	28.4 %
I prefer to keep our IT maintenance on site	23.5 %	24.2 %	22.5 %	21.9 %
We don't use IT enough to warrant the investment	23.0 %	20.3 %	27.0 %	27.1 %
I don't know enough about it	19.4 %	20.3 %	18.8 %	15.5 %
I don't understand how it would help	9.7 %	5.8 %	15.4 %	14.2 %
Nothing	6.9 %	7.5 %	6.2 %	5.2 %
Base	2081	1233	693	155

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What interests you in hosted services?

Base: Only asked of respondents not currently using hosted services, but have considered it

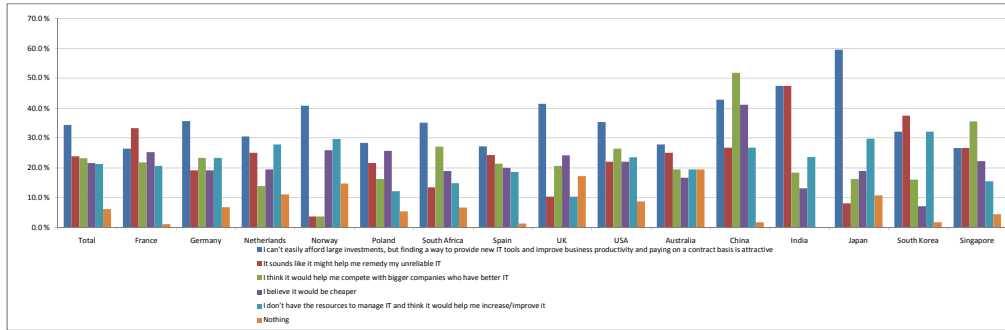
	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
I can't easily afford large investments, but finding a way to provide new IT tools and improve business productivity and paying on a contract basis is attractive	34.4%	26.4%	35.6%	30.6%	40.7%	28.4%	35.1%	27.1%	41.4%	35.3%	27.8%	42.9%	47.4%	59.5%	32.1%	26.7%
It sounds like it might help me remedy my unreliable IT	23.8%	33.3%	19.2%	25.0%	3.7%	21.6%	13.5%	24.3%	10.3%	22.1%	25.0%	26.8%	47.4%	8.1%	37.5%	26.7%
I think it would help me compete with bigger companies who have better IT	23.2%	21.8%	23.3%	13.9%	3.7%	16.2%	27.0%	21.4%	20.7%	26.5%	19.4%	51.8%	18.4%	16.2%	16.1%	35.6%
I believe it would be cheaper	21.6%	25.3%	19.2%	19.4%	25.9%	25.7%	18.9%	20.0%	24.1%	22.1%	16.7%	41.1%	13.2%	18.9%	7.1%	22.2%
I don't have the resources to manage IT and think it would help me increase/improve it	21.3%	20.7%	23.3%	27.8%	29.6%	12.2%	14.9%	18.6%	10.3%	29.6%	18.4%	20.3%	23.7%	29.7%	32.1%	15.8%
Nothing	6.2%	1.1%	6.8%	11.1%	14.8%	5.4%	6.8%	1.4%	17.2%	8.8%	19.4%	13.9%	10.0%	10.8%	1.8%	4.4%
<b>Base</b>	<b>806</b>	<b>87</b>	<b>73</b>	<b>36</b>	<b>27</b>	<b>74</b>	<b>74</b>	<b>70</b>	<b>29</b>	<b>68</b>	<b>36</b>	<b>56</b>	<b>38</b>	<b>31</b>	<b>56</b>	<b>45</b>

Commentary

As with respondents using hosted services, more than a third of these respondents made this the most popular answer.

Only around one in twenty respondents who have considered hosted services, couldn't find anything to interest them about hosted services.

Hosted services are not as appealing in Australia where almost one in five respondents found nothing to interest them.



Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
I can't easily afford large investments, but finding a way to provide new IT tools and improve business productivity and paying on a contract basis is attractive	34.4%	32.9%	32.5%	38.9%	39.3%	33.9%	33.3%	28.4%	31.8%	38.9%	32.4%
It sounds like it might help me remedy my unreliable IT	23.8%	28.9%	27.8%	25.7%	23.1%	28.1%	15.2%	18.2%	15.9%	27.8%	18.9%
I think it would help me compete with bigger companies who have better IT	23.2%	23.7%	29.4%	25.2%	23.9%	19.8%	18.7%	27.3%	13.8%	27.8%	2.7%
I believe it would be cheaper	21.6%	27.6%	21.4%	15.9%	23.9%	23.1%	16.7%	13.6%	29.5%	16.7%	35.1%
I don't have the resources to manage IT and think it would help me increase/improve it	21.3%	22.4%	19.8%	19.5%	20.5%	17.4%	36.4%	23.9%	15.9%	16.7%	21.6%
Nothing	6.2%	5.3%	7.9%	3.5%	6.8%	9.1%	9.1%	2.3%	2.3%	0.0%	10.8%
<b>Base</b>	<b>806</b>	<b>76</b>	<b>128</b>	<b>113</b>	<b>117</b>	<b>121</b>	<b>66</b>	<b>88</b>	<b>44</b>	<b>18</b>	<b>37</b>

Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
I can't easily afford large investments, but finding a way to provide new IT tools and improve business productivity and paying on a contract basis is attractive	34.4%	35.8%	36.1%	38.1%	38.1%	29.8%	30.7%	28.6%	33.3%
It sounds like it might help me remedy my unreliable IT	23.8%	12.9%	26.2%	33.3%	19.0%	29.8%	26.1%	26.5%	23.5%
I think it would help me compete with bigger companies who have better IT	23.2%	24.7%	18.9%	18.1%	22.9%	25.0%	21.6%	28.6%	33.3%
I believe it would be cheaper	21.6%	16.0%	18.0%	24.8%	21.0%	24.2%	27.3%	22.4%	25.5%
I don't have the resources to manage IT and think it would help me increase/improve it	21.3%	18.1%	22.1%	19.0%	18.1%	25.8%	23.9%	28.6%	16.7%
Nothing	6.2%	9.9%	4.9%	6.7%	4.6%	4.8%	5.7%	6.1%	3.9%
<b>Base</b>	<b>806</b>	<b>162</b>	<b>122</b>	<b>105</b>	<b>105</b>	<b>124</b>	<b>88</b>	<b>49</b>	<b>51</b>

Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	EMEA	APAC	USA
I can't easily afford large investments, but finding a way to provide new IT tools and improve business productivity and paying on a contract basis is attractive	34.4%	31.7%	38.8%	35.3%
It sounds like it might help me remedy my unreliable IT	23.8%	21.1%	29.1%	22.1%
I think it would help me compete with bigger companies who have better IT	23.2%	20.2%	27.6%	26.5%
I believe it would be cheaper	21.6%	22.1%	20.5%	22.1%
I don't have the resources to manage IT and think it would help me increase/improve it	21.3%	18.9%	25.0%	23.5%
Nothing	6.2%	6.2%	5.6%	8.8%
<b>Base</b>	<b>806</b>	<b>470</b>	<b>268</b>	<b>68</b>

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Which of these factors prevent you from the complete implementation of hosted services across your organisation?

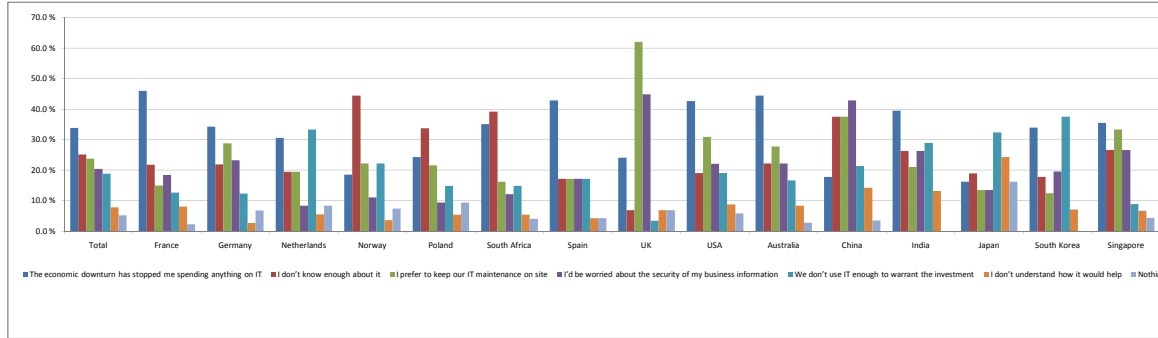
Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
The economic downturn has stopped me spending anything on IT	33.9%	46.0%	34.2%	30.6%	18.5%	24.3%	35.1%	42.9%	24.1%	42.6%	44.4%	17.9%	39.5%	16.2%	33.9%	35.6%
I don't know enough about it	25.2%	21.8%	24.0%	19.4%	44.4%	33.8%	39.2%	17.1%	6.9%	19.1%	22.2%	37.5%	26.3%	18.9%	17.9%	26.7%
I prefer to keep our IT maintenance on site	23.8%	14.9%	28.8%	19.4%	22.2%	21.6%	16.9%	17.1%	62.1%	30.9%	27.8%	37.5%	21.1%	13.5%	12.5%	33.3%
I'd be worried about the security of my business information	20.5%	18.4%	23.3%	8.3%	11.1%	9.5%	12.2%	17.1%	44.8%	22.1%	22.2%	42.0%	26.3%	13.5%	19.6%	26.7%
We don't use IT enough to warrant the investment	18.9%	12.6%	12.3%	33.3%	22.2%	14.9%	14.9%	17.1%	3.4%	19.1%	16.7%	21.4%	28.9%	32.4%	37.5%	8.9%
I don't understand how it would help	7.8%	8.0%	2.7%	5.6%	3.7%	5.4%	5.4%	4.3%	6.9%	8.8%	8.3%	14.3%	13.2%	24.3%	7.1%	6.7%
Nothing	5.2%	2.3%	6.8%	8.3%	7.4%	9.5%	4.1%	4.3%	6.9%	2.8%	3.6%	0.0%	16.2%	0.0%	4.4%	
Base	806	87	73	38	27	74	74	70	29	68	36	56	38	37	58	45

Commentary

Financial factors were the most reported factor by respondents to have considered hosted services, just like those using hosted services.

A lack of knowledge was more widely reported by these respondents than those currently using hosted services which is understandable given that these respondents have only considered using hosted services.



Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
The economic downturn has stopped me spending anything on IT	33.9%	32.9%	34.9%	31.9%	35.0%	38.8%	27.3%	36.4%	38.6%	27.8%	21.6%
I don't know enough about it	25.2%	28.9%	22.2%	29.2%	26.5%	14.9%	30.3%	27.3%	20.5%	16.7%	40.5%
I prefer to keep our IT maintenance on site	23.8%	26.3%	24.6%	23.9%	23.1%	33.1%	27.3%	17.0%	13.6%	16.7%	13.5%
I'd be worried about the security of my business information	20.5%	25.0%	24.6%	15.0%	22.2%	24.0%	16.7%	17.0%	13.6%	44.4%	8.1%
We don't use IT enough to warrant the investment	18.9%	21.1%	23.8%	18.6%	18.8%	16.5%	18.2%	17.0%	9.1%	22.2%	21.6%
I don't understand how it would help	7.8%	10.5%	5.6%	9.7%	10.3%	3.3%	7.6%	10.2%	4.5%	0.0%	13.5%
Nothing	5.2%	3.9%	4.8%	4.4%	3.4%	5.0%	10.6%	4.5%	6.8%	0.0%	10.8%
Base	806	76	126	113	117	121	66	88	44	18	37

Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
The economic downturn has stopped me spending anything on IT	33.9%	31.5%	30.3%	37.1%	37.1%	40.3%	35.2%	22.4%	29.4%
I don't know enough about it	25.2%	37.0%	34.4%	30.5%	13.3%	16.9%	15.9%	20.4%	19.6%
I prefer to keep our IT maintenance on site	23.8%	21.6%	16.4%	21.0%	23.8%	32.3%	27.3%	24.5%	27.5%
I'd be worried about the security of my business information	20.5%	14.8%	13.9%	23.8%	19.0%	25.8%	21.6%	28.6%	27.5%
We don't use IT enough to warrant the investment	18.9%	21.0%	20.5%	20.0%	14.3%	22.6%	11.4%	20.4%	17.6%
I don't understand how it would help	7.8%	4.3%	12.3%	7.6%	8.6%	7.3%	6.8%	16.3%	2.0%
Nothing	5.2%	6.2%	4.1%	2.9%	7.6%	3.2%	8.0%	6.1%	3.9%
Base	806	162	122	105	105	124	88	49	51

Base: Only asked of respondents not currently using hosted services, but have considered it

	Total	EMEA	APAC	USA
The economic downturn has stopped me spending anything on IT	33.9%	34.5%	30.6%	42.6%
I don't know enough about it	25.2%	26.0%	25.4%	19.1%
I prefer to keep our IT maintenance on site	23.8%	22.3%	24.6%	30.9%
I'd be worried about the security of my business information	20.5%	17.0%	26.1%	22.1%
We don't use IT enough to warrant the investment	18.9%	15.5%	24.6%	19.1%
I don't understand how it would help	7.8%	5.3%	11.9%	8.8%
Nothing	5.2%	5.7%	4.1%	5.9%
Base	806	470	268	68

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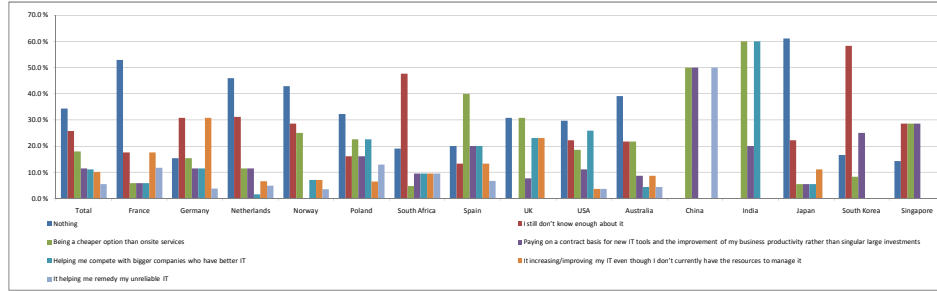
What might interest you in hosted services?

Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Nothing	34.3%	52.9%	15.4%	45.9%	42.9%	32.3%	19.0%	20.0%	30.8%	29.6%	39.1%	6.0%	0.0%	61.1%	16.7%	14.3%
I still don't know enough about it	25.8%	17.6%	30.8%	31.1%	28.6%	16.1%	47.6%	13.3%	0.0%	22.2%	21.7%	0.0%	0.0%	22.2%	59.3%	28.6%
Being a cheaper option than onsite services	18.0%	5.9%	15.4%	11.5%	25.0%	22.6%	4.8%	40.0%	30.8%	18.5%	21.7%	50.0%	60.0%	5.6%	8.3%	28.6%
Paying on a contract basis for new IT tools and the improvement of my business productivity rather than singular large investments	11.4%	5.9%	11.5%	11.5%	0.0%	16.1%	9.5%	20.0%	7.7%	11.1%	8.7%	50.0%	20.0%	5.6%	25.0%	28.6%
Helping me compete with bigger companies who have better IT	11.1%	5.9%	11.5%	1.6%	7.1%	22.6%	9.5%	20.0%	23.1%	25.9%	4.3%	0.0%	60.0%	5.6%	0.0%	0.0%
Increasing/improving my IT even though I don't currently have the resources to manage it	10.1%	17.6%	30.8%	6.6%	7.1%	6.5%	9.5%	13.3%	23.1%	3.7%	8.7%	0.0%	0.0%	11.1%	0.0%	0.0%
Helping me remedy my unreliable IT	5.6%	11.8%	3.8%	4.9%	3.6%	12.9%	9.5%	6.7%	0.0%	3.7%	4.3%	50.0%	0.0%	0.0%	0.0%	0.0%
Base	306	17	26	61	28	31	21	15	13	27	23	2	5	18	12	7

Commentary

The fact that "nothing" about hosted services could interest over a third of the total respondents indicates that they are not willing to consider hosted services, or that they don't know enough about it (as a quarter reported) to make that consideration.



Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	Financial services	Man. & eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma	Other Commercial
Nothing	34.3%	34.8%	17.6%	36.7%	30.0%	42.9%	30.4%	27.3%	11.1%	0.0%	56.1%
I still don't know enough about it	25.8%	26.1%	32.4%	33.9%	20.0%	14.3%	21.7%	22.7%	27.8%	0.0%	31.7%
Being a cheaper option than onsite services	18.0%	17.4%	23.5%	7.1%	30.0%	20.4%	13.0%	27.3%	33.3%	0.0%	4.9%
Paying on a contract basis for new IT tools and the improvement of my business productivity rather than singular large investments	11.4%	13.0%	8.8%	12.5%	14.3%	13.0%	13.6%	5.6%	0.0%	0.0%	7.3%
Helping me compete with bigger companies who have better IT	11.1%	4.3%	14.7%	7.1%	20.0%	18.4%	4.3%	9.1%	16.7%	0.0%	2.4%
Increasing/improving my IT even though I don't currently have the resources to manage it	10.1%	8.7%	11.8%	5.4%	12.5%	10.2%	13.0%	18.2%	22.2%	0.0%	2.4%
Helping me remedy my unreliable IT	5.6%	13.0%	8.8%	1.8%	5.0%	2.0%	17.4%	4.5%	5.6%	0.0%	2.4%
Base	306	23	34	56	40	49	23	22	18	0	41

Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Nothing	34.3%	37.6%	34.9%	23.3%	37.0%	31.3%	40.0%	36.4%	36.8%
I still don't know enough about it	25.8%	29.0%	23.2%	32.6%	29.6%	18.8%	4.0%	27.3%	36.8%
Being a cheaper option than onsite services	18.0%	17.2%	17.9%	14.0%	7.4%	28.1%	32.0%	0.0%	21.1%
Paying on a contract basis for new IT tools and the improvement of my business productivity rather than singular large investments	11.4%	6.6%	17.9%	7.0%	11.1%	12.5%	24.0%	9.1%	0.0%
Helping me compete with bigger companies who have better IT	11.1%	14.0%	14.3%	11.6%	0.0%	9.4%	4.0%	27.3%	5.3%
Increasing/improving my IT even though I don't currently have the resources to manage it	10.1%	7.5%	8.9%	14.0%	11.1%	18.8%	16.0%	0.0%	0.0%
Helping me remedy my unreliable IT	5.6%	3.2%	7.1%	7.0%	14.8%	9.4%	0.0%	0.0%	0.0%
Base	306	93	56	43	27	32	25	11	19

Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	EMEA	APAC	USA
Nothing	34.3%	34.3%	34.3%	20.6%
I still don't know enough about it	25.8%	25.9%	26.9%	22.2%
Being a cheaper option than onsite services	18.0%	17.5%	19.4%	18.5%
Paying on a contract basis for new IT tools and the improvement of my business productivity rather than singular large investments	11.4%	10.4%	14.9%	11.1%
Helping me compete with bigger companies who have better IT	11.1%	10.4%	7.5%	25.9%
Increasing/improving my IT even though I don't currently have the resources to manage it	10.1%	12.3%	6.0%	3.7%
Helping me remedy my unreliable IT	5.6%	6.6%	3.0%	3.7%
Base	306	212	67	27

Of these factors, which do you think would prevent the complete implementation of hosted services across your organisation?

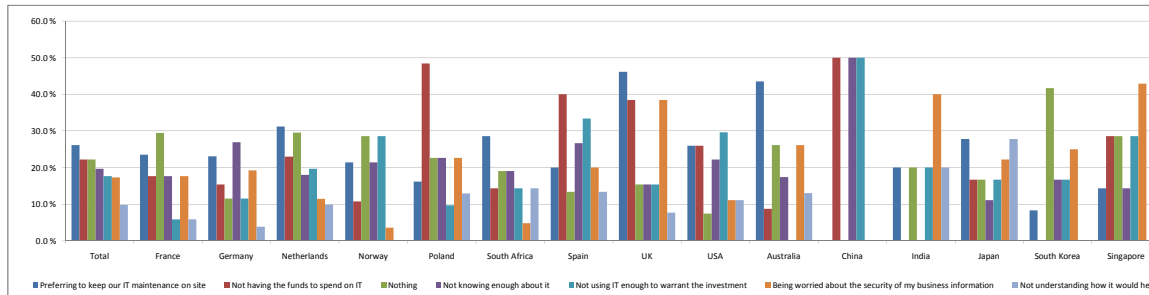
Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
<b>Preferring to keep our IT maintenance on site</b>	<b>26.1%</b>	23.5%	23.1%	31.1%	21.4%	16.1%	28.6%	20.0%	46.2%	25.9%	43.5%	0.0%	20.0%	27.8%	8.3%	14.3%
<b>Not having the funds to spend on IT</b>	<b>22.2%</b>	17.6%	15.4%	23.0%	10.7%	48.4%	14.3%	40.0%	38.5%	25.9%	8.7%	50.0%	0.0%	16.7%	0.0%	28.6%
<b>Nothing</b>	<b>22.2%</b>	29.4%	11.9%	20.4%	28.6%	22.6%	19.0%	13.3%	15.4%	7.4%	26.1%	0.0%	20.0%	16.7%	41.7%	28.6%
<b>Not knowing enough about it</b>	<b>19.6%</b>	17.6%	26.9%	18.0%	21.4%	22.6%	19.0%	26.7%	15.4%	22.2%	17.4%	50.0%	0.0%	11.1%	16.7%	14.3%
<b>Not using IT enough to warrant the investment</b>	<b>17.6%</b>	5.9%	11.5%	19.7%	28.6%	9.7%	14.3%	33.3%	15.4%	29.6%	0.0%	50.0%	20.0%	16.7%	16.7%	28.6%
<b>Being worried about the security of my business information</b>	<b>17.3%</b>	17.6%	19.2%	11.5%	3.6%	22.6%	4.8%	20.0%	38.5%	11.1%	26.1%	0.0%	40.0%	22.2%	25.0%	42.9%
<b>Not understanding how it would help</b>	<b>9.8%</b>	5.9%	3.8%	9.8%	0.0%	12.9%	14.3%	13.3%	7.7%	11.1%	13.0%	0.0%	20.0%	27.8%	0.0%	0.0%

Commentary

The proportions of respondents selecting these top two answers are similar to those of respondents using, and having previously considered hosted services - indicating that there are genuine concerns about IT which all users currently have.

One-fifth of the respondents answering "nothing", indicates that having considered hosted services through answering these questions, they have formed an extremely positive opinion of it.



Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
<b>Preferring to keep our IT maintenance on site</b>	<b>26.1%</b>	43.5%	32.4%	17.9%	27.5%	38.8%	8.7%	18.2%	22.2%	0.0%	22.0%
<b>Not having the funds to spend on IT</b>	<b>22.2%</b>	21.7%	23.5%	25.0%	15.0%	16.3%	34.8%	27.3%	27.8%	0.0%	19.5%
<b>Nothing</b>	<b>22.2%</b>	26.1%	17.6%	23.2%	25.0%	16.3%	8.7%	13.6%	22.2%	0.0%	39.0%
<b>Not knowing enough about it</b>	<b>19.6%</b>	8.7%	14.7%	19.6%	10.0%	18.4%	34.8%	31.8%	33.3%	0.0%	19.5%
<b>Not using IT enough to warrant the investment</b>	<b>17.6%</b>	17.4%	17.6%	19.6%	20.0%	12.2%	13.0%	18.2%	16.7%	0.0%	22.0%
<b>Being worried about the security of my business information</b>	<b>17.3%</b>	4.3%	20.6%	19.6%	17.5%	32.7%	21.7%	9.1%	11.1%	0.0%	4.9%
<b>Not understanding how it would help</b>	<b>9.8%</b>	0.0%	11.8%	10.7%	12.5%	14.3%	13.0%	4.5%	5.6%	0.0%	7.3%

Base

Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
<b>Preferring to keep our IT maintenance on site</b>	<b>26.1%</b>	21.5%	16.1%	30.2%	33.3%	34.4%	44.0%	27.3%	21.1%
<b>Not having the funds to spend on IT</b>	<b>22.2%</b>	28.0%	26.8%	14.0%	22.2%	18.8%	12.0%	36.4%	10.5%
<b>Nothing</b>	<b>22.2%</b>	28.0%	19.8%	16.3%	18.5%	25.0%	20.0%	18.2%	21.1%
<b>Not knowing enough about it</b>	<b>19.6%</b>	19.4%	33.9%	14.0%	18.5%	9.4%	8.0%	27.3%	21.1%
<b>Not using IT enough to warrant the investment</b>	<b>17.6%</b>	19.4%	17.9%	16.3%	22.2%	12.5%	24.0%	0.0%	15.8%
<b>Being worried about the security of my business information</b>	<b>17.3%</b>	19.4%	14.3%	11.6%	14.8%	25.0%	16.0%	9.1%	26.3%
<b>Not understanding how it would help</b>	<b>9.8%</b>	12.9%	7.1%	9.3%	3.7%	9.4%	12.0%	9.1%	10.5%

Base

Base: Only asked of respondents who are not currently using hosted services and have not considered doing so

	Total	EMEA	APAC	USA
<b>Preferring to keep our IT maintenance on site</b>	<b>26.1%</b>	25.9%	26.9%	25.9%
<b>Not having the funds to spend on IT</b>	<b>22.2%</b>	25.0%	11.9%	25.9%
<b>Nothing</b>	<b>22.2%</b>	23.1%	25.4%	7.4%
<b>Not knowing enough about it</b>	<b>19.6%</b>	20.8%	14.9%	22.2%
<b>Not using IT enough to warrant the investment</b>	<b>17.6%</b>	17.5%	13.4%	29.6%
<b>Being worried about the security of my business information</b>	<b>17.3%</b>	15.1%	26.9%	11.1%
<b>Not understanding how it would help</b>	<b>9.8%</b>	8.5%	13.4%	11.1%

Base

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Do you currently use Cloud Computing?

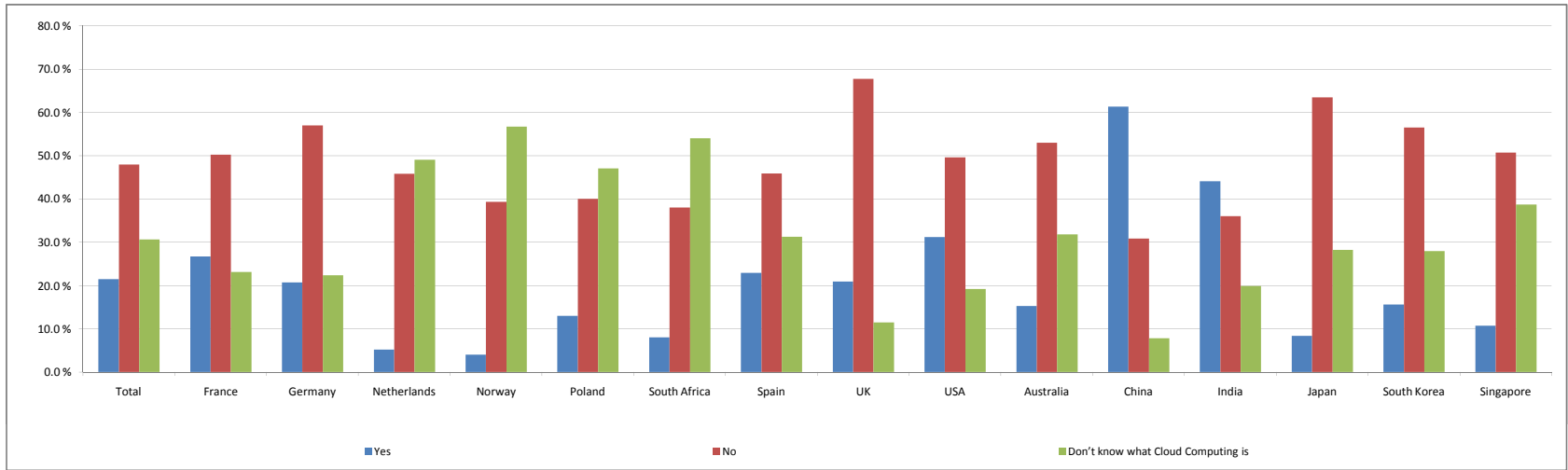
Base: Asked to all respondents	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	21.4 %	26.7 %	20.7 %	5.2 %	4.0 %	12.9 %	8.0 %	22.9 %	20.9 %	31.2 %	15.2 %	61.3 %	44.1 %	8.3 %	15.6 %	10.7 %
No	47.9 %	50.2 %	57.0 %	45.8 %	39.3 %	40.0 %	38.0 %	45.8 %	67.7 %	49.6 %	53.0 %	30.9 %	36.0 %	63.5 %	56.5 %	50.7 %
Don't know what Cloud Computing is	30.6 %	23.1 %	22.3 %	49.0 %	56.7 %	47.1 %	54.0 %	31.2 %	11.4 %	19.2 %	31.8 %	7.8 %	19.9 %	28.2 %	27.9 %	38.7 %
Base	3193	251	251	251	150	255	250	253	254	250	151	256	161	156	154	150

Commentary

Only a fifth of the total respondents are using cloud computing.

Cloud computing is most prevalent in China, where more than six in ten respondents are currently using it, and less than one in ten don't know what it is.

Given their previously discussed attitudes toward hosted services, it is not surprising that respondents in the Netherlands and Norway are the least likely to be using cloud computing.



Base: Asked to all respondents	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	21.4 %	33.5 %	25.6 %	16.3 %	19.0 %	26.3 %	19.4 %	17.4 %	16.0 %	27.4 %	5.3 %
No	47.9 %	39.3 %	50.1 %	46.7 %	47.5 %	57.4 %	44.4 %	45.7 %	47.4 %	52.6 %	41.5 %
Don't know what Cloud Computing is	30.6 %	27.2 %	24.3 %	37.0 %	33.5 %	16.3 %	36.3 %	37.0 %	36.5 %	20.0 %	53.2 %
Base	3193	313	481	441	531	491	248	265	156	95	171

Base: Asked to all respondents	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Yes	21.4 %	4.7 %	14.5 %	17.3 %	22.2 %	26.9 %	35.5 %	39.5 %	39.1 %
No	47.9 %	44.1 %	48.3 %	49.3 %	52.9 %	50.0 %	46.9 %	45.2 %	45.9 %
Don't know what Cloud Computing is	30.6 %	51.2 %	37.2 %	33.4 %	24.9 %	23.1 %	17.6 %	15.4 %	15.0 %
Base	3193	615	489	434	454	412	341	228	220

Base: Asked to all respondents	Total	EMEA	APAC	USA
Yes	21.4 %	15.8 %	29.6 %	31.2 %
No	47.9 %	48.5 %	46.6 %	49.6 %
Don't know what Cloud Computing is	30.6 %	35.8 %	23.8 %	19.2 %
Base	3193	1915	1028	250

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Do you think your business would benefit from Cloud Computing?

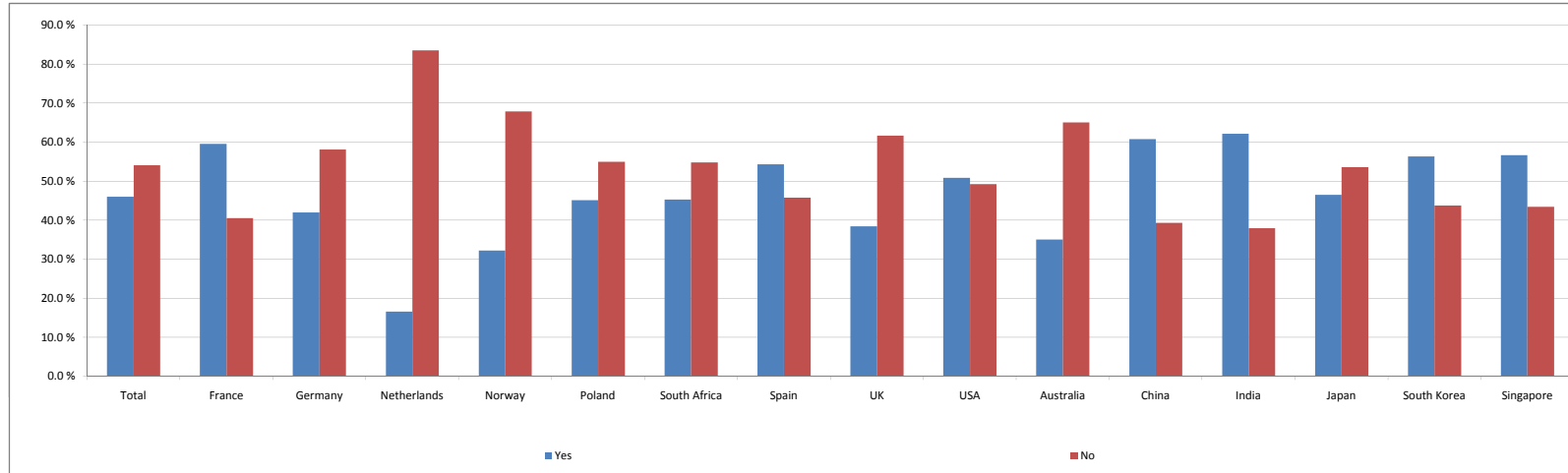
Base: Only asked of respondents who answered they do not use cloud computing

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	46.0 %	59.5 %	42.0 %	16.5 %	32.2 %	45.1 %	45.3 %	54.3 %	38.4 %	50.8 %	35.0 %	60.8 %	62.1 %	46.5 %	56.3 %	56.6 %
No	54.0 %	40.5 %	58.0 %	83.5 %	67.8 %	54.9 %	54.7 %	45.7 %	61.6 %	49.2 %	65.0 %	39.2 %	37.9 %	53.5 %	43.7 %	43.4 %
Base	1531	126	143	115	59	102	95	116	172	124	80	79	58	99	87	76

Commentary

Similarly, respondents from these countries are the least likely to see a benefit to cloud computing.

More than half of the total respondents could not see a benefit to cloud computing.



Base: Only asked of respondents who answered they do not use cloud computing

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	46.0 %	52.0 %	41.1 %	47.6 %	47.6 %	52.1 %	40.0 %	46.3 %	39.2 %	66.0 %	18.3 %
No	54.0 %	48.0 %	58.9 %	52.4 %	52.4 %	47.9 %	60.0 %	53.7 %	60.8 %	34.0 %	81.7 %
Base	1531	123	241	206	252	282	110	121	74	50	71

Base: Only asked of respondents who answered they do not use cloud computing

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
No	54.0 %	66.1 %	60.2 %	56.1 %	50.0 %	48.1 %	47.5 %	42.7 %	46.5 %
Yes	46.0 %	33.9 %	39.8 %	43.9 %	50.0 %	51.9 %	52.5 %	57.3 %	53.5 %
Base	1531	271	236	214	240	206	160	103	101

Base: Only asked of respondents who answered they do not use cloud computing

	Total	EMEA	APAC	USA
Yes	46.0 %	42.1 %	52.2 %	50.8 %
No	54.0 %	57.9 %	47.8 %	49.2 %
Base	1531	928	479	124

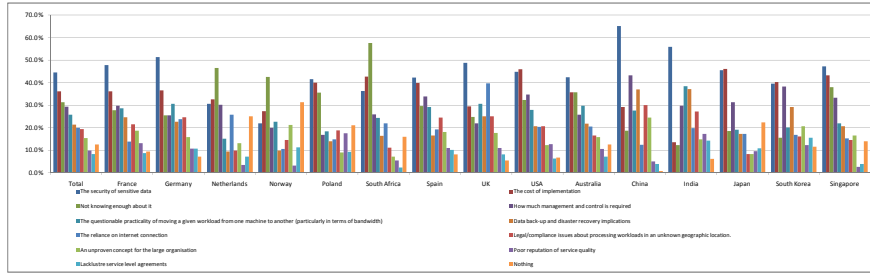
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What is stopping your business from fully embracing Cloud Computing across your organisation?

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Base: Asked to all respondents	44.6%	47.8%	51.4%	30.7%	22.0%	41.8%	38.4%	42.3%	48.8%	44.8%	42.4%	68.2%	55.9%	45.5%	38.6%	47.3%
The security of sensitive data	38.2%	36.3%	28.7%	32.7%	27.3%	40.0%	42.8%	38.9%	29.5%	48.0%	38.8%	28.3%	13.7%	46.2%	40.3%	43.3%
The cost of implementation	31.3%	27.5%	25.5%	26.9%	22.7%	29.4%	44.4%	28.6%	41.8%	32.5%	38.5%	13.8%	12.4%	18.5%	15.5%	38.0%
Not knowing enough about it	29.4%	29.8%	25.5%	30.3%	20.0%	16.9%	26.0%	34.0%	22.0%	34.8%	25.8%	43.4%	29.8%	31.4%	38.3%	33.3%
How much management and control is required	25.8%	28.7%	30.7%	15.1%	22.7%	18.4%	24.4%	29.2%	30.7%	28.0%	29.8%	27.7%	35.5%	19.2%	20.1%	22.0%
The questionable practicality of moving a given workload from one machine to another (particularly in terms of bandwidth)	21.4%	24.7%	22.7%	9.6%	10.0%	14.1%	16.4%	16.6%	25.2%	20.8%	21.9%	37.1%	37.3%	17.3%	29.2%	20.7%
Data back-up and disaster recovery implications	20.1%	13.9%	23.9%	25.9%	10.7%	14.9%	22.0%	19.4%	39.8%	20.4%	20.5%	12.5%	19.9%	17.3%	16.9%	15.3%
The reliance on internet connection	19.5%	21.5%	24.7%	10.0%	14.7%	18.8%	11.2%	24.5%	25.2%	20.8%	16.6%	30.1%	27.3%	8.3%	16.2%	14.7%
Legal/compliance issues about processing workloads in an unknown geographic location	15.5%	18.7%	15.9%	13.1%	21.3%	9.0%	7.2%	18.2%	17.7%	12.4%	15.9%	24.6%	14.9%	8.3%	20.8%	16.7%
An unproven concept for the large organisation	8.9%	13.1%	10.8%	3.6%	3.3%	17.6%	5.6%	11.1%	11.0%	12.8%	10.6%	5.1%	17.4%	9.6%	12.3%	2.7%
Poor reputation of service quality	8.4%	8.8%	10.8%	7.2%	11.3%	9.4%	2.4%	10.3%	8.3%	6.4%	7.3%	3.9%	14.3%	10.9%	15.6%	4.0%
Lacklustre service level agreements	12.6%	9.6%	7.2%	25.1%	31.3%	21.2%	16.0%	8.3%	5.5%	6.8%	12.6%	0.8%	6.2%	22.4%	11.7%	14.0%
Nothing																
Base	3193	251	251	251	150	255	250	253	254	250	191	256	161	156	154	150

Commentary

Amount half of the total respondents reported data security to be a concern they have with cloud computing.  
 It is not surprising that around a third of respondents had lack of knowledge to be a factor, considering a similar proportion said they don't know what it is about SD.



	Total	Financial services	Man. or eng.	ROT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prog. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Base: Asked to all respondents	44.6%	51.4%	36.3%	40.1%	49.3%	45.0%	32.9%	43.0%	51.3%	58.9%	29.2%
The security of sensitive data	38.2%	28.1%	37.4%	41.7%	35.6%	30.1%	33.9%	41.9%	48.1%	32.6%	38.0%
The cost of implementation	31.3%	23.0%	28.9%	36.3%	34.1%	20.8%	33.5%	34.7%	38.7%	25.3%	49.7%
Not knowing enough about it	29.4%	31.3%	32.6%	27.4%	28.8%	30.3%	30.6%	30.6%	25.6%	26.3%	22.2%
How much management and control is required	25.8%	35.8%	23.5%	21.5%	26.0%	27.7%	26.6%	27.5%	19.2%	29.5%	18.7%
The questionable practicality of moving a given workload from one machine to another (particularly in terms of bandwidth)	21.4%	24.6%	22.2%	19.5%	20.5%	24.2%	21.0%	21.9%	21.8%	24.2%	11.1%
Data back-up and disaster recovery implications	20.1%	16.3%	25.4%	19.3%	20.3%	21.6%	20.4%	17.9%	17.9%	16.8%	16.4%
The reliance on internet connection	19.5%	21.1%	19.5%	19.5%	22.4%	19.3%	20.6%	16.6%	16.0%	32.6%	7.0%
Legal/compliance issues about processing workloads in an unknown geographic location	15.5%	18.5%	15.4%	15.0%	14.5%	16.9%	13.3%	13.6%	14.7%	20.0%	15.8%
An unproven concept for the large organisation	8.9%	12.1%	8.1%	11.6%	8.9%	9.8%	13.7%	7.9%	11.5%	11.6%	5.3%
Poor reputation of service quality	8.4%	9.6%	6.7%	8.6%	9.0%	12.6%	5.2%	4.5%	7.1%	12.6%	5.8%
Lacklustre service level agreements	12.6%	9.3%	17.4%	12.2%	12.8%	13.8%	17.3%	12.5%	9.0%	2.8%	26.9%
Nothing											
Base	3193	313	481	441	531	491	248	265	156	95	171

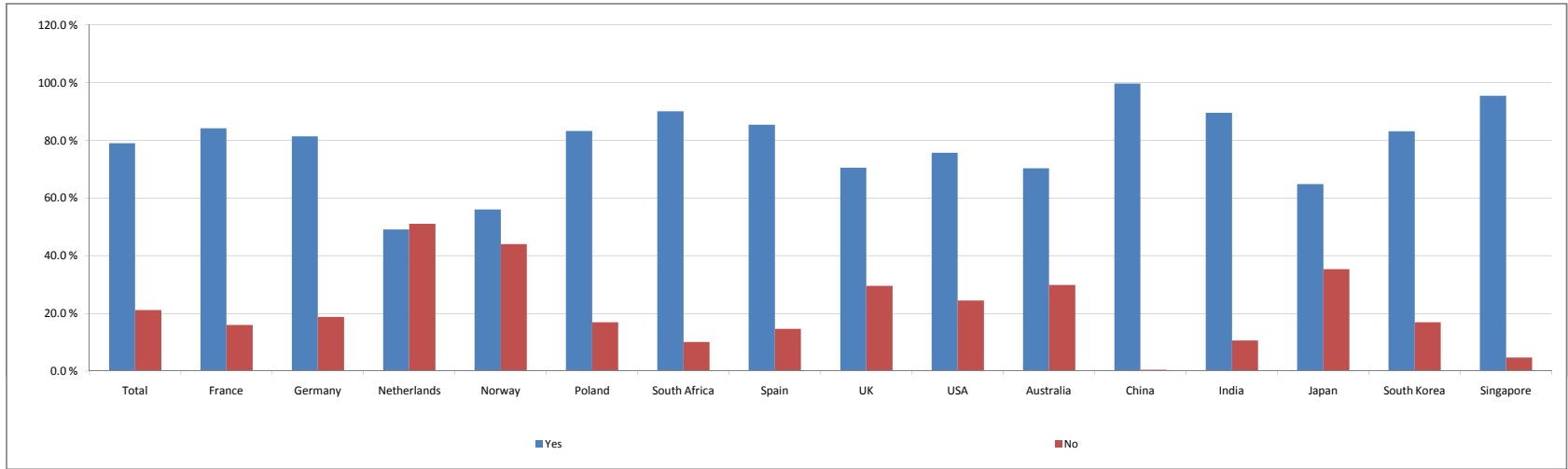
	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Base: Asked to all respondents	44.6%	33.0%	42.9%	46.4%	46.5%	53.9%	40.0%	46.2%	48.6%
The security of sensitive data	38.2%	41.1%	38.9%	37.3%	34.8%	29.8%	35.2%	31.6%	29.1%
The cost of implementation	31.3%	46.5%	38.9%	33.2%	27.5%	18.8%	18.4%	18.4%	22.3%
Not knowing enough about it	29.4%	22.0%	29.2%	28.6%	31.1%	31.3%	34.0%	28.5%	35.5%
How much management and control is required	25.8%	20.8%	21.7%	25.3%	26.7%	30.3%	22.6%	37.3%	32.3%
The questionable practicality of moving a given workload from one machine to another (particularly in terms of bandwidth)	21.4%	15.4%	18.6%	21.7%	19.4%	25.5%	27.3%	28.9%	23.6%
Data back-up and disaster recovery implications	20.1%	22.1%	21.7%	18.0%	22.5%	20.1%	15.5%	18.9%	18.2%
The reliance on internet connection	19.5%	11.7%	17.2%	17.5%	22.0%	24.3%	23.8%	25.9%	23.2%
Legal/compliance issues about processing workloads in an unknown geographic location	15.5%	9.8%	9.2%	14.7%	19.8%	17.5%	19.6%	21.5%	22.3%
An unproven concept for the large organisation	8.9%	6.7%	9.2%	11.3%	9.5%	11.9%	12.3%	10.1%	10.9%
Poor reputation of service quality	8.4%	6.0%	7.8%	9.4%	9.3%	11.9%	12.0%	10.1%	8.8%
Lacklustre service level agreements	12.6%	20.5%	14.7%	12.4%	10.4%	7.8%	10.0%	7.9%	9.1%
Nothing									
Base	3193	615	489	434	454	412	341	228	220

	Total	EMEA	APAC	USA
Base: Asked to all respondents	44.6%	41.1%	51.0%	44.8%
The security of sensitive data	38.2%	36.1%	34.0%	46.0%
The cost of implementation	31.3%	35.9%	22.6%	32.4%
Not knowing enough about it	29.4%	25.8%	34.6%	34.8%
How much management and control is required	25.8%	25.1%	26.5%	28.0%
The questionable practicality of moving a given workload from one machine to another (particularly in terms of bandwidth)	21.4%	17.8%	28.3%	20.8%
Data back-up and disaster recovery implications	20.1%	21.9%	16.6%	20.4%
The reliance on internet connection	19.5%	19.1%	20.0%	20.8%
Legal/compliance issues about processing workloads in an unknown geographic location	15.5%	14.8%	17.6%	12.4%
An unproven concept for the large organisation	8.9%	9.9%	9.2%	12.8%
Poor reputation of service quality	8.4%	8.4%	8.9%	6.4%
Lacklustre service level agreements	12.6%	14.2%	10.2%	6.8%
Nothing				
Base	3193	1915	1028	250

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A business has many communications channels (email, Instant Messenger, fixed phone, mobile phone, fax, mobile email), would you benefit from a way to unify all these communications channels to make them easier to budget?

	Total	France	Germany	Netherlands	Norway	Poland	South Africa	Spain	UK	USA	Australia	China	India	Japan	South Korea	Singapore
Yes	78.9 %	84.1 %	81.3 %	49.0 %	56.0 %	83.1 %	90.0 %	85.4 %	70.5 %	75.6 %	70.2 %	99.6 %	89.4 %	64.7 %	83.1 %	95.3 %
No	21.1 %	15.9 %	18.7 %	51.0 %	44.0 %	16.9 %	10.0 %	14.6 %	29.5 %	24.4 %	29.8 %	0.4 %	10.6 %	35.3 %	16.9 %	4.7 %



**Commentary**

Almost four in every five respondents said they would benefit from a way to unify all communication channels. The country where this idea was greeted most warmly was China, where over 99% said "yes". Only one country had more respondents answer "no", than "yes", with just over half of respondents in the Netherlands answering that they would not benefit.

	Total	Financial services	Man. or eng.	RDT	Bus. & prof. services	Computer services or telecoms	Travel, leisure or entertainment	Prop. construction or mining	Consumer services	Chemical or pharma.	Other Commercial
Yes	78.9 %	81.5 %	81.1 %	80.0 %	80.8 %	77.6 %	77.8 %	81.5 %	79.5 %	90.5 %	53.8 %
No	21.1 %	18.5 %	18.9 %	20.0 %	19.2 %	22.4 %	22.2 %	18.5 %	20.5 %	9.5 %	46.2 %

	Total	2 to 10	11 to 25	26 to 50	50 to 100	101 to 200	201 to 300	301 to 400	401 to 500
Yes	78.9 %	68.9 %	76.9 %	77.2 %	83.5 %	81.3 %	84.5 %	85.1 %	85.9 %
No	21.1 %	31.1 %	23.1 %	22.8 %	16.5 %	18.7 %	15.5 %	14.9 %	14.1 %

	Total	EMEA	APAC	USA
Yes	78.9 %	75.9 %	85.3 %	75.6 %
No	21.1 %	24.1 %	14.7 %	24.4 %