

Cloud Computing and the Role of IT Professionals in Small- to Mid-Sized Businesses

April 2011

Overview and Methodology

Objective – Obtain a deeper view of new technology adoption patterns and IT roles within small- to mid-sized businesses.

Approach – Zoomerang distributed a survey to decision makers within small- to mid-sized businesses (SMBs).

Results – In total, 525 decision makers (i.e. founders, managers, etc.) completed the survey providing insight into the state of their technology, IT support and its role within the company, as well as perceptions of cloud computing.

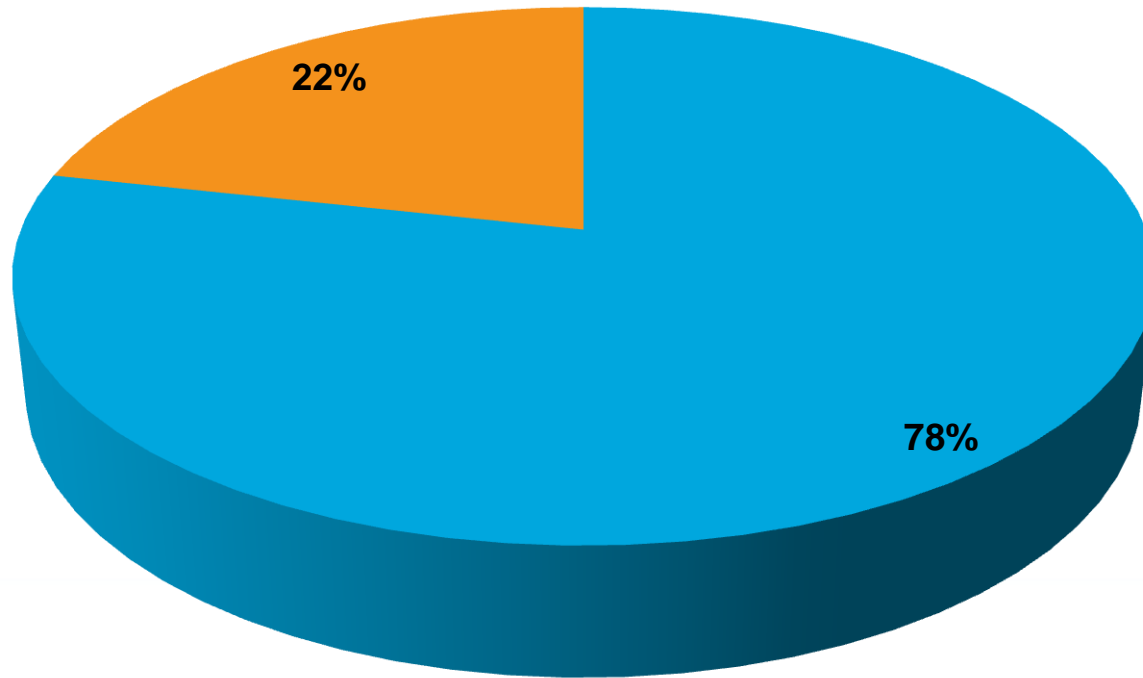
Key Takeaways –

- Of the businesses requiring IT support, 22% outsource their IT needs to vendors
- 30% of SMBs indicated that the role of their in-house IT staff has evolved in the past year to include day-to-day functions
- SMBs appear confused about cloud computing as 72% are “not sure what it is” or are “not familiar” with the technology
- Only 10% of those surveyed have deployed cloud-based technologies
- Microsoft’s Windows operating system is still dominant within SMBs with 91% using Windows XP, Windows Vista or Windows 7

SMB IT Management and Maintenance

More than 3/4 of SMBs support an internal IT role or department

How does your company support IT management and maintenance?

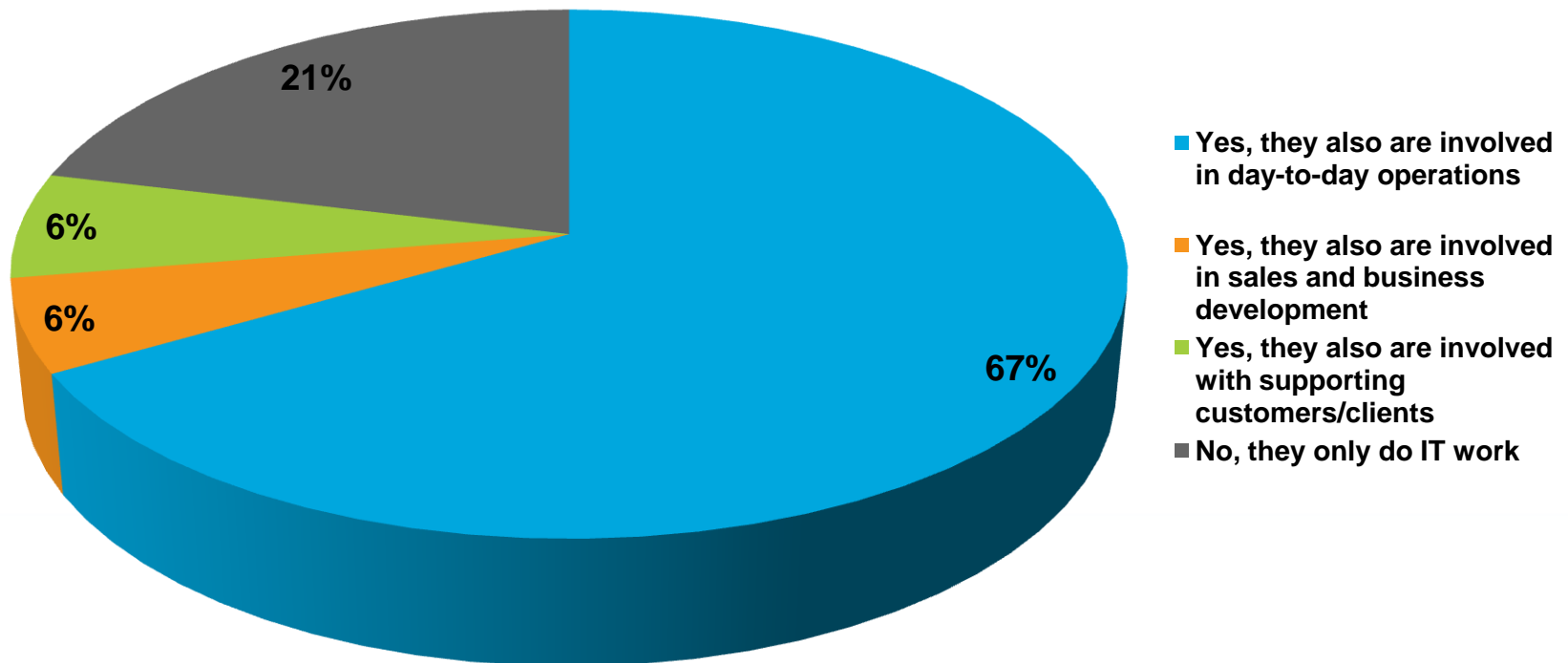


■ In-house ■ Outsource

SMB IT Management and Maintenance

Of the 78% with in-house IT support, 79% take on additional roles

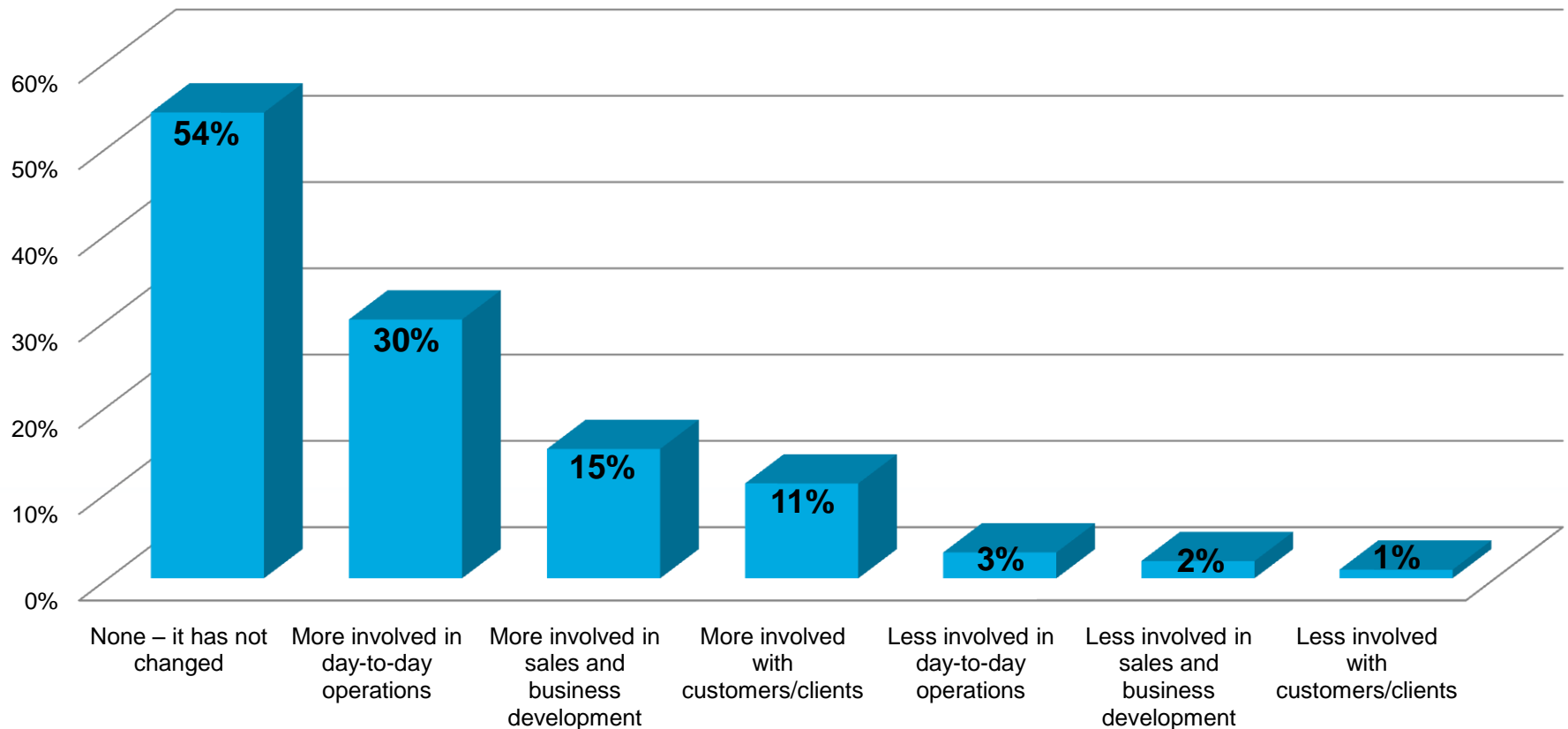
Does your in-house IT staff take on additional roles other than IT at your company?



SMB IT Management and Maintenance

IT roles continue to evolve and become ingrained with daily operations

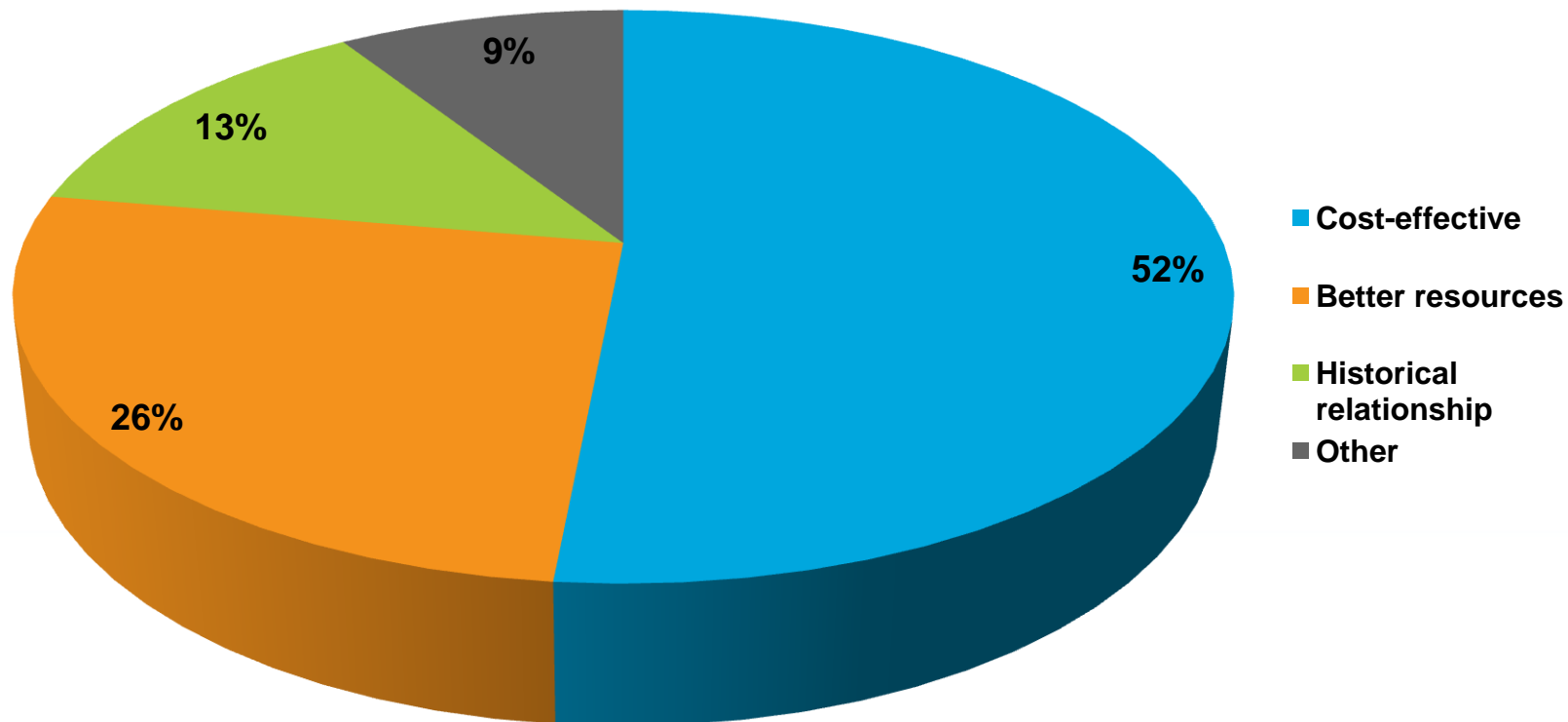
How has the role of your in-house IT support changed over the past year?
(Check all that apply)



SMB IT Management and Maintenance

Of the 22% outsourcing IT, cost is the primary reason

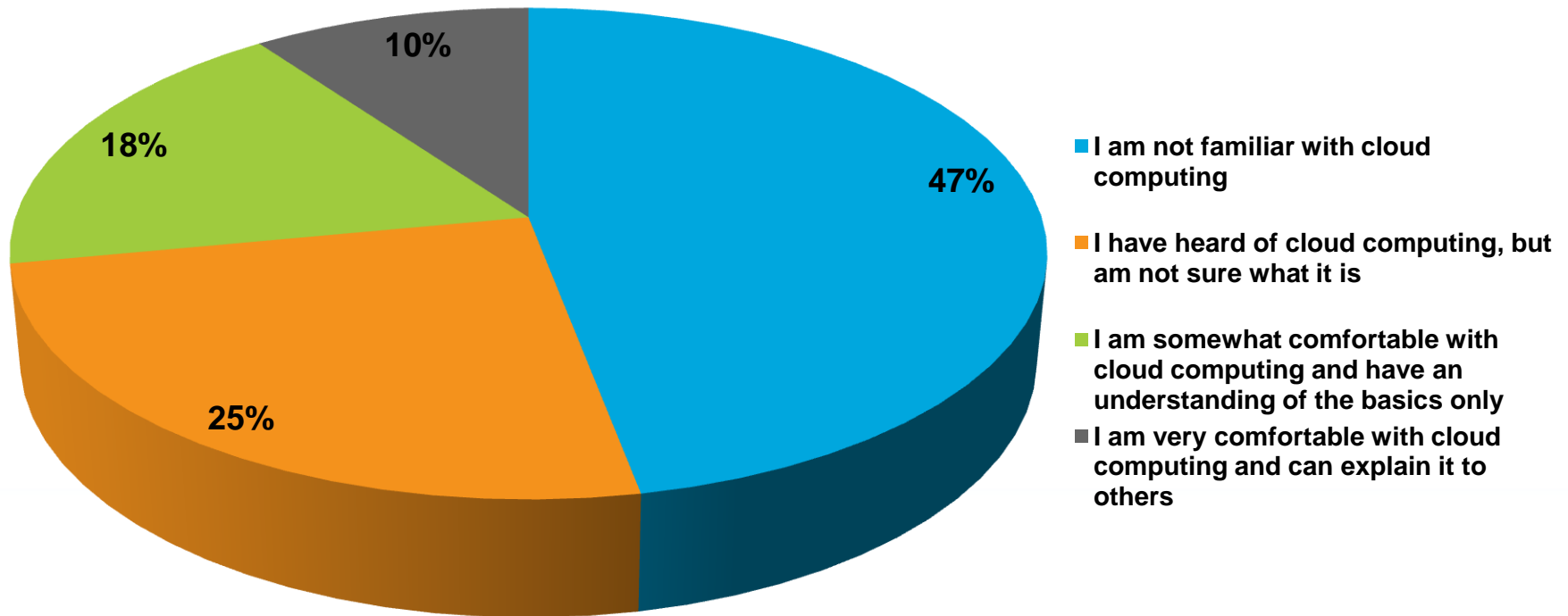
Why does your business outsource its IT management and maintenance?



SMB Usage of Cloud Computing

72% are either not familiar with or not sure what cloud computing is

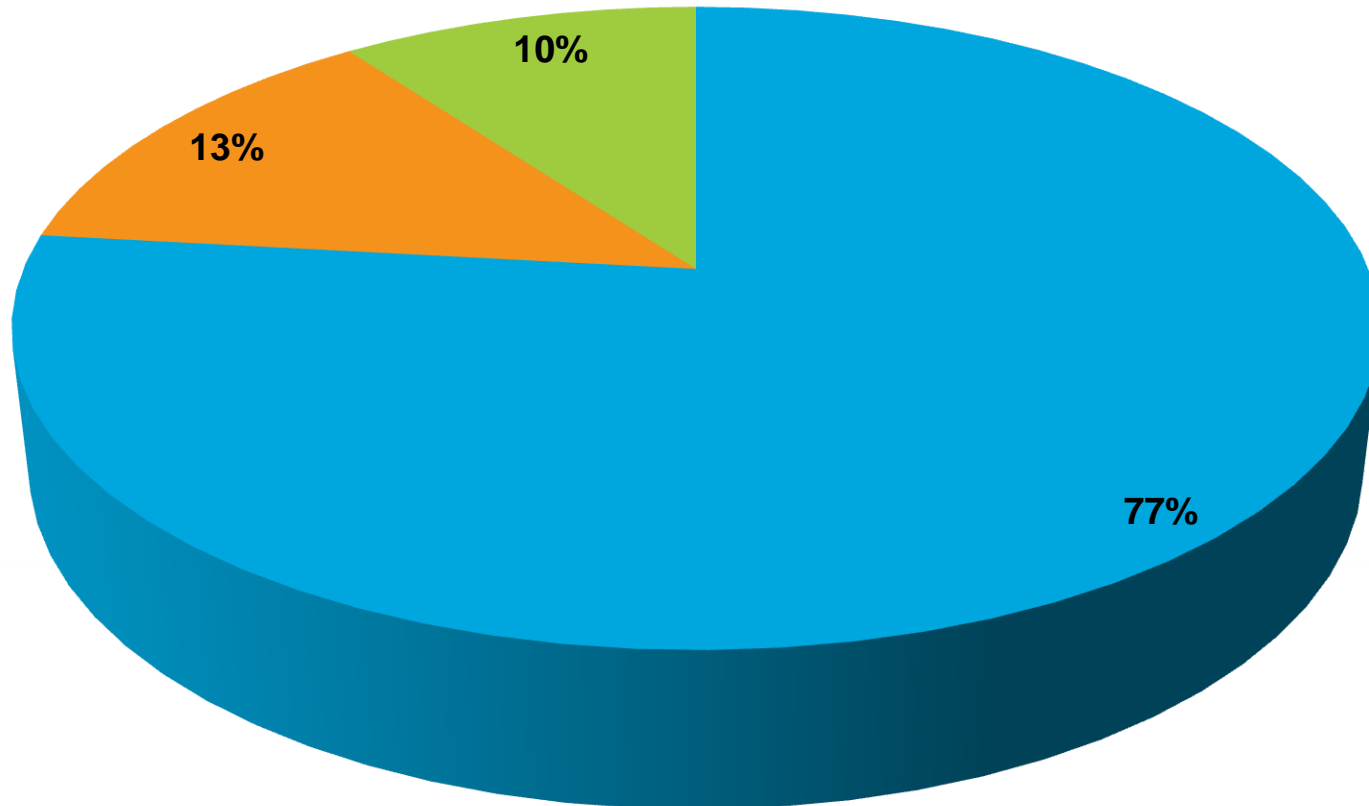
Which of the following best describes your level of familiarity with cloud computing?



SMB Usage of Cloud Computing

Only 10% of SMBs have deployed cloud computing technologies

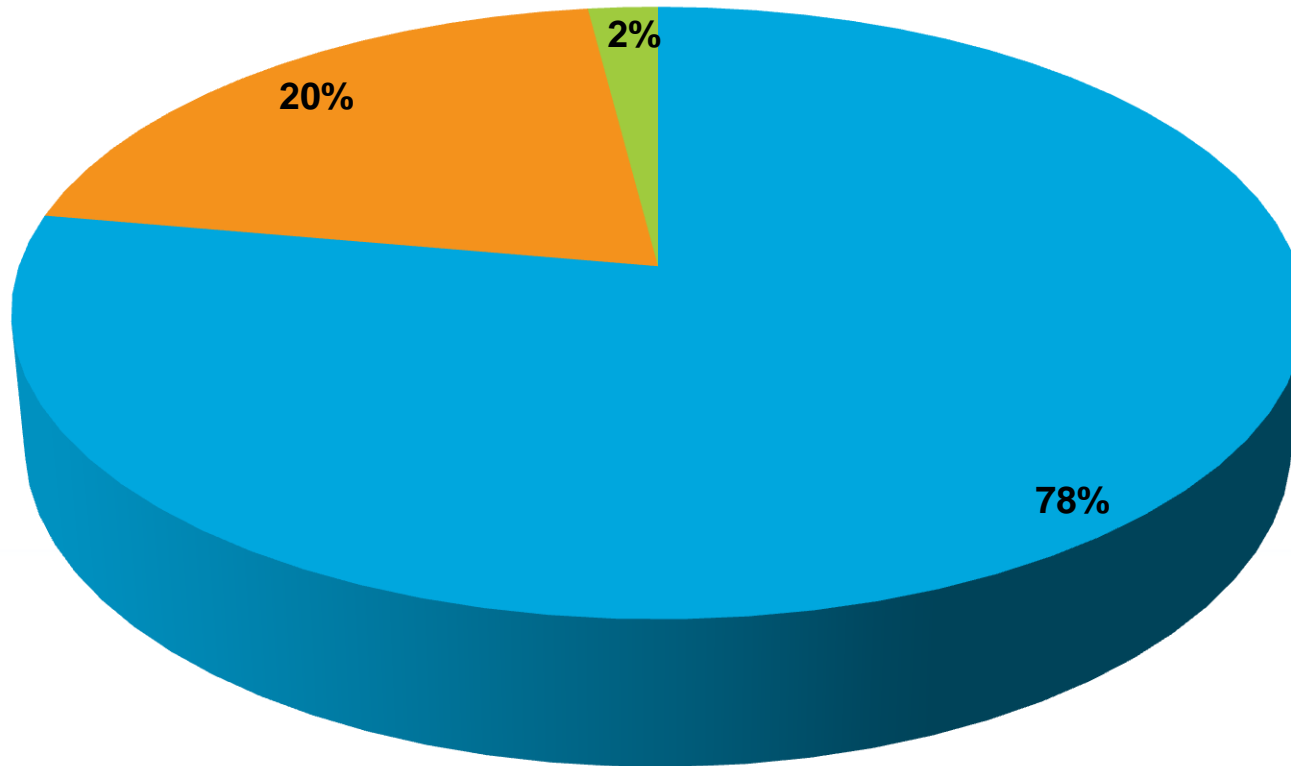
Does your business currently use cloud computing technologies?



SMB Usage of Cloud Computing

Of those yet to adopt cloud computing, 78% still do not plan to this year

Does your business plan on “taking to the cloud” this year?

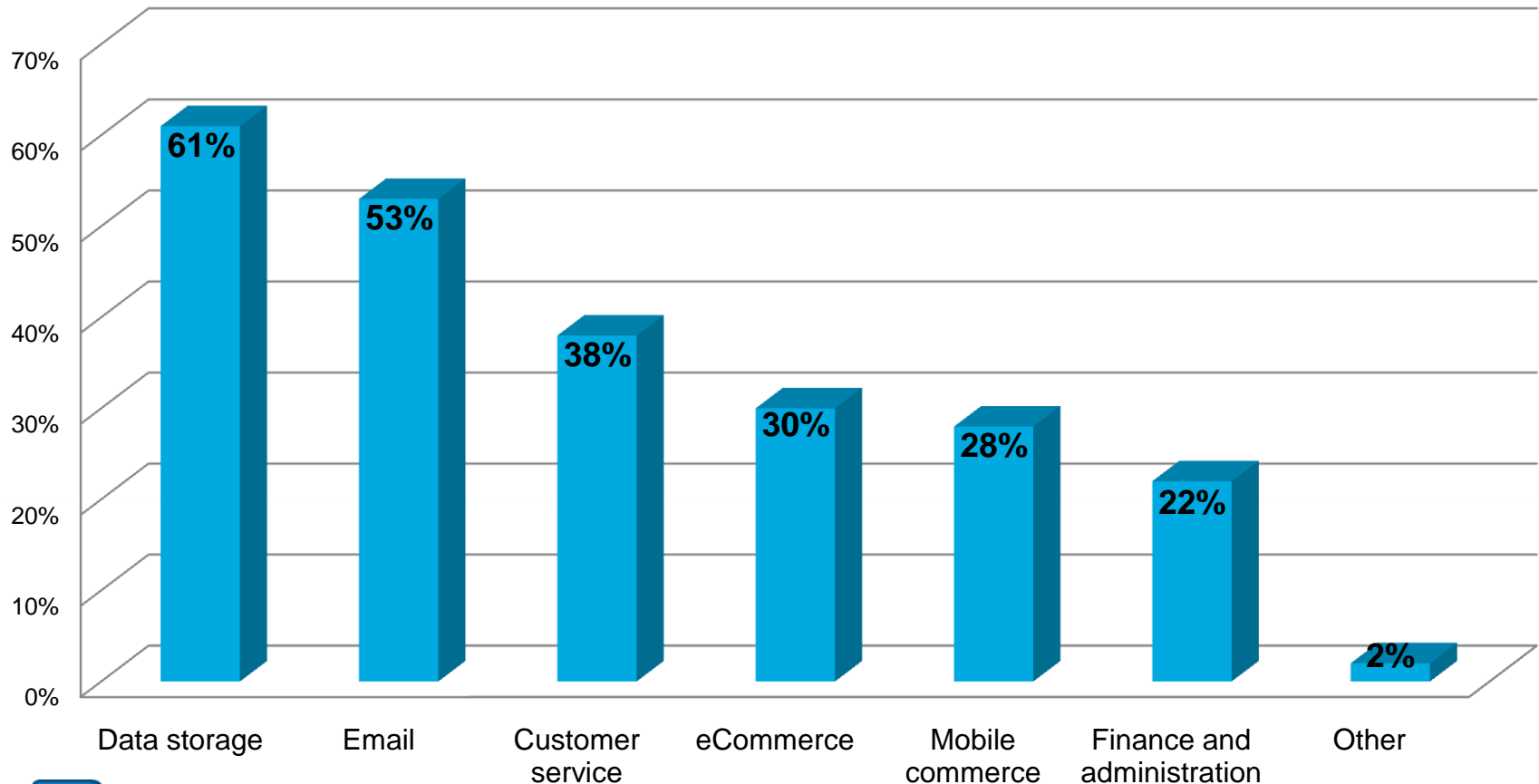


■ No ■ Still evaluating costs/benefits ■ Yes

SMB Usage of Cloud Computing

Data Storage and email are the top reasons to implement cloud technologies

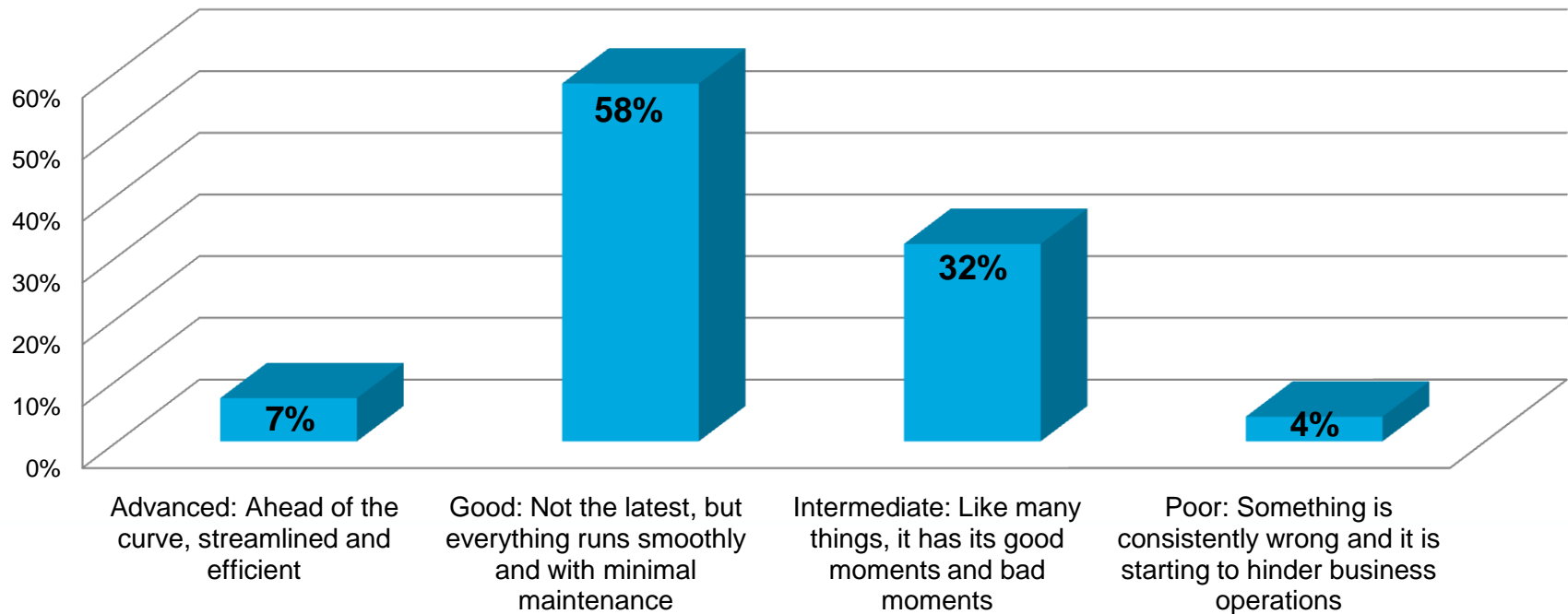
For which of the following does your business plan on employing cloud technologies this year? (Check all that apply)



SMB State of Business Technology

Over half of SMBs rate their technology situation as “good”

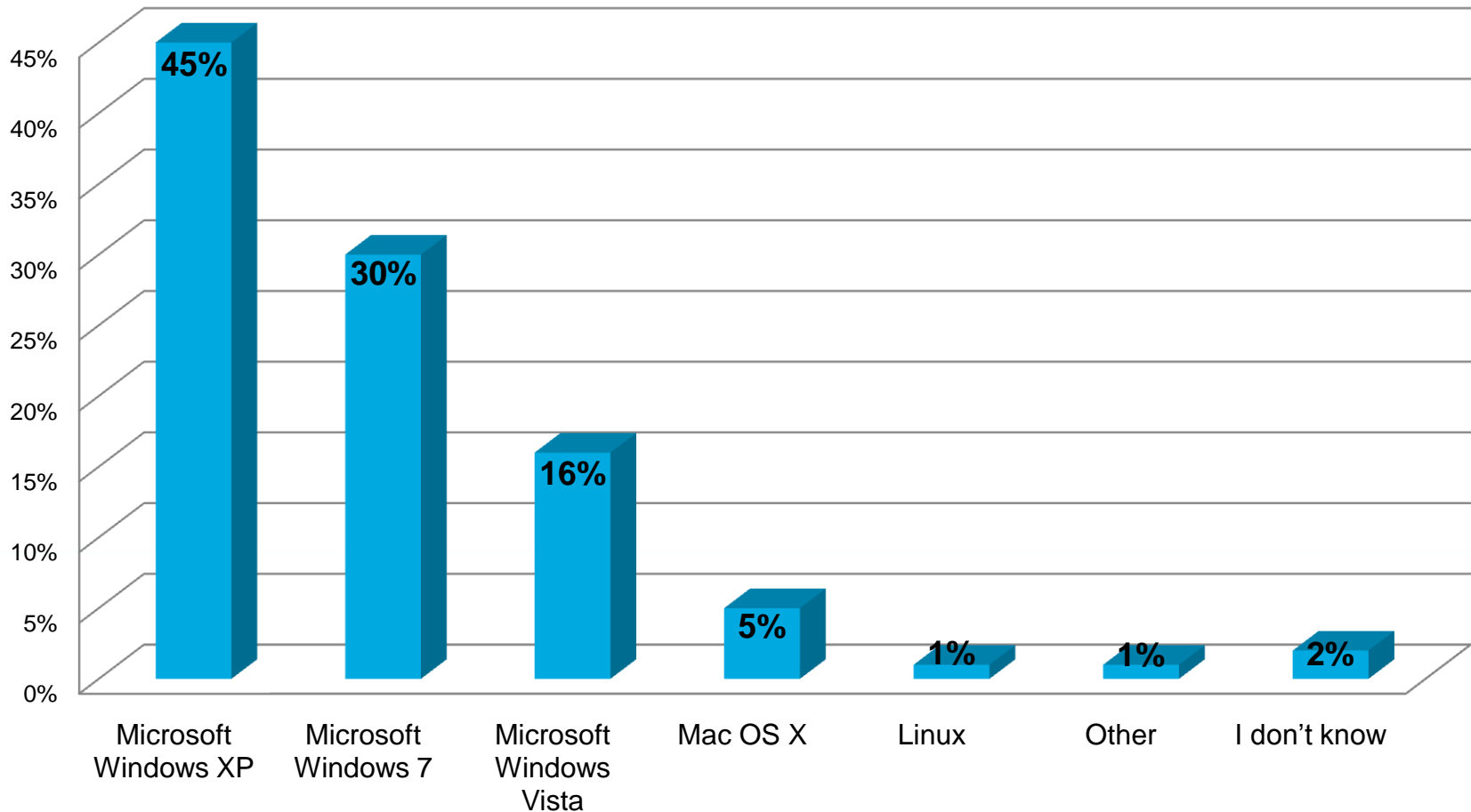
How would you assess the current state of your business' technology?



SMB State of Business Technology

Microsoft is still the dominant operating system among SMBs

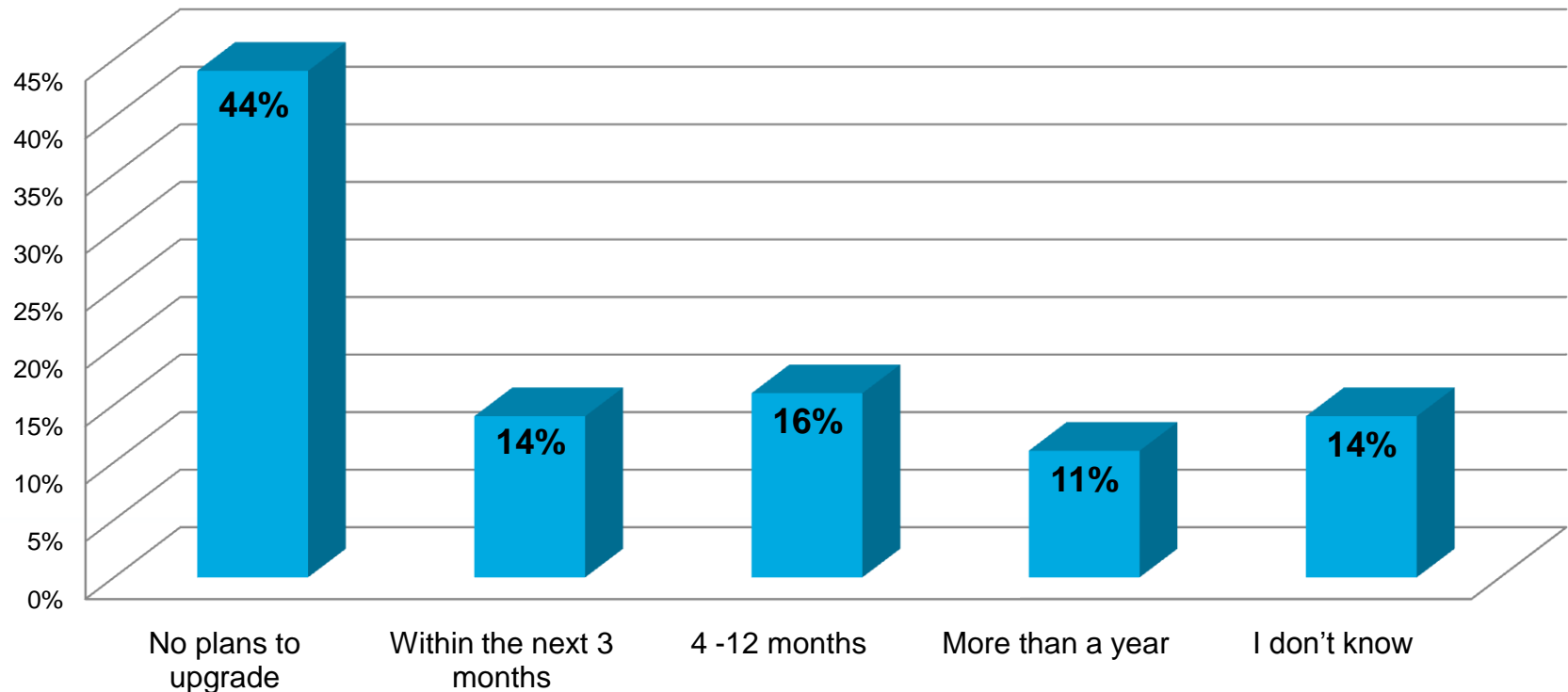
Which operating system do your business computer(s) run on?



SMB Technology Upgrade Plans

44% of SMBs have no plans to upgrade their technology

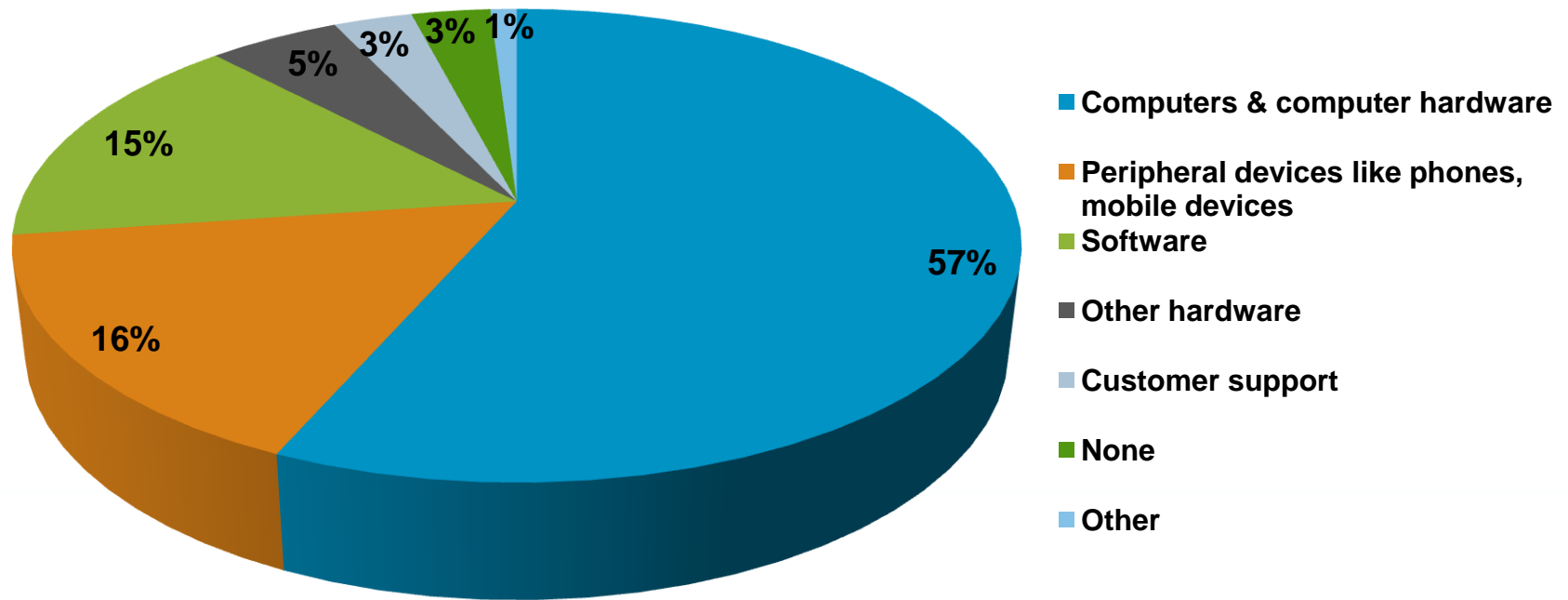
When does your business plan to upgrade its technology?
(Technology including, but not limited to computers, printers, and phones)



SMB Technology Upgrade Plans

Computers and hardware most common areas of planned investment

Which area of technology will be your primary focus of investment?



Appendix

Age vs. Familiarity with the 'Cloud'

Breakdown of the familiarity with cloud computing by age range

Which of the following best describes your level of familiarity with cloud computing?

	Total*	Please specify your age range					
		25 or younger	26 - 35	36 - 45	46 - 55	56 - 65	Over 65
	525	3	39	83	161	175	64
I am very comfortable with cloud computing and can explain it to others	55 10.5%	1 33.3%	12 30.8%	19 22.9%	10 6.2%	12 6.9%	1 1.6%
I am somewhat comfortable with cloud computing and have an understanding of the basics only	93 17.7%	0 0.0%	11 28.2%	14 16.9%	23 14.3%	33 18.9%	12 18.8%
I have heard of cloud computing, but am not sure what it is	132 25.1%	2 66.7%	4 10.3%	22 26.5%	44 27.3%	42 24.0%	18 28.1%
I am not familiar with cloud computing	245 46.7%	0 0.0%	12 30.8%	28 33.7%	84 52.2%	88 50.3%	33 51.6%

*Total = The number of respondents for the entire survey who answered the Row question and, if a filter is applied, meet the filter criteria.

In-House vs. Outsourced IT Management

Breakdown of the number employees how IT is managed

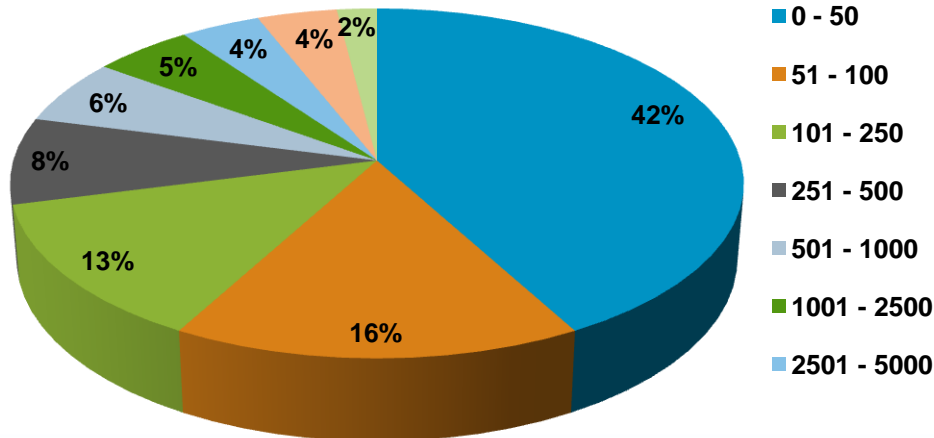
How does your company support IT management and maintenance?									
	Total*	Including yourself, how many people does your company employ?							
		1 - 5	6 - 10	11 - 20	21 - 50	51 - 100	101 - 250	251 - 500	501 - 1000
	348	174	27	29	24	23	31	23	17
In-house	273 78.4%	143 82.2%	16 59.3%	13 44.8%	18 75.0%	19 82.6%	27 87.1%	21 91.3%	16 94.1%
Outsource	75 21.6%	31 17.8%	11 40.7%	16 55.2%	6 25.0%	4 17.4%	4 12.9%	2 8.7%	1 5.9%

*Total = The number of respondents for the entire survey who answered the Row question and, if a filter is applied, meet the filter criteria.

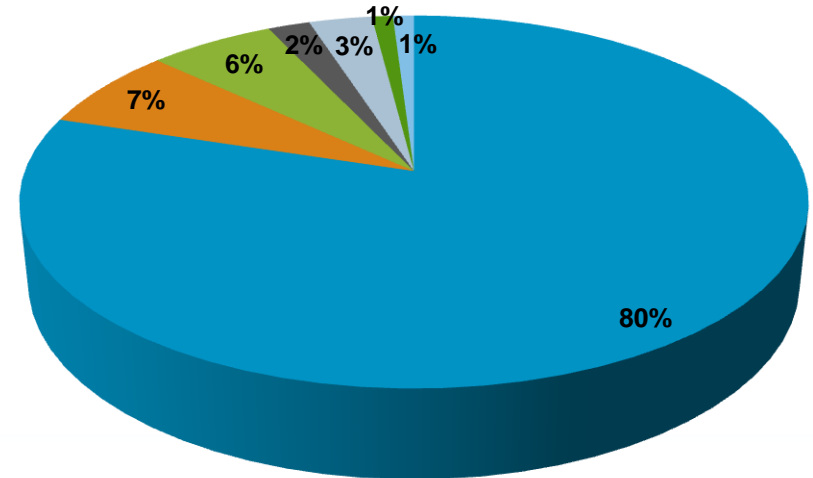
SMB Email Communication

80% have up to 50 unread emails in their inbox

How many total emails (read & unread) are currently in your inbox?



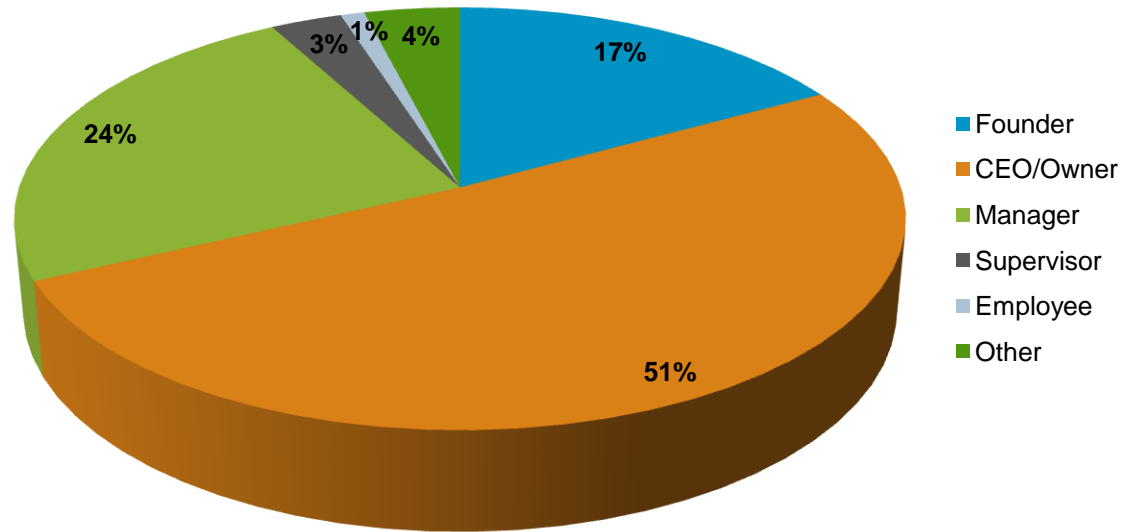
How many unread emails are currently in your inbox?



Demographics

Respondent's Role within the Business

More than half of the respondents are CEOs or business owners



Role	Percentage
Founder	17%
CEO/Owner	51%
Manager	24%
Supervisor	3%
Employee	1%
Other	4%

Top 10: Business Locations

Breakdown of the top 10 states represented among respondents

State	Percentage
California	10%
Florida	7%
New York	7%
Illinois	6%
Texas	6%
Michigan	4%
New Jersey	4%
Missouri	3%
North Carolina	3%
Ohio	3%

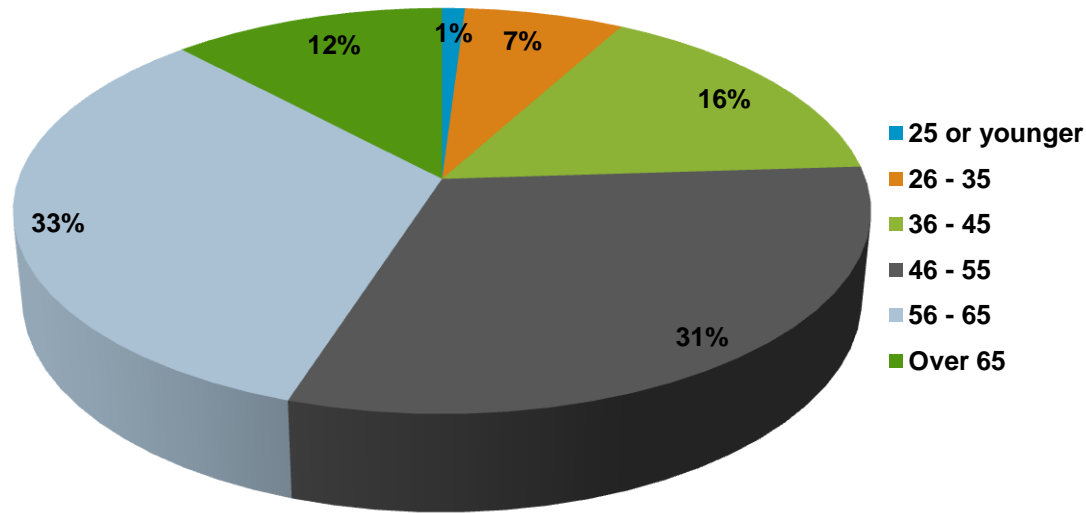
Business Size

Over 70% of SMBs have 10 employees or fewer

Employees	Percentage
1 - 5	64%
6 - 10	7%
11 - 20	7%
21 - 50	5%
51 - 100	4%
101 - 250	6%
251 - 500	4%
501 - 1000	3%

Respondent Age Range

The majority range from mid-40's to mid-60's



Age Range	Percentage
25 or younger	1%
26 - 35	7%
36 - 45	16%
46 - 55	31%
56 - 65	33%
Over 65	12%