

# IT Insights & Priorities Research Report



United Kingdom September 2009

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## Executive Summary

In mid 2009 CNET Direct and ZDNet UK conducted a major survey of 880 senior UK IT decision makers about their IT priorities, technology implementation plans, and the effect of the global financial crisis on their IT operations. The data analysis was conducted by market research company Connection Research.

The respondent group was widely distributed across 11 industry sectors and a full spectrum of organisational size, from SMEs to large corporations and government instrumentalities. The respondent breakdown is shown in Chapter 14 of the report.

The report examines the key IT objectives and challenges facing IT departments throughout the United Kingdom. It provides a comprehensive overview of IT considerations, strategies and technologies being implemented and planned by large and small IT-using organisations.

Overall, the picture of IT priorities in the UK in 2009 is a conservative one. There are significant areas of investment activity, such as laptop computing, but largely because of the global financial situation, the key distinguishing feature of the IT priorities of UK users in 2009 is on saving money and operating within constrained budgets.

A key distinguishing feature is the deferral of many short term projects, a reduction in IT budgets, and the referral of many IT decisions, which may have previously been made by the CIO or IT manager, to the CEO or CFO. Money is tight, and senior management is taking a greater interest in the justification of IT expenditure than was previously the case.

## About CBS Interactive

CBS Interactive is the home of a strong-performing portfolio of UK and global web destinations including ZDNet UK (business technology) [www.zdnet.co.uk](http://www.zdnet.co.uk), Silicon (technology management) [www.silicon.com](http://www.silicon.com), Tech Republic (IT resources) [www.techrepublic.com](http://www.techrepublic.com), CNET UK (consumer technology) [www.cnet.co.uk](http://www.cnet.co.uk), BNET Australia (business management) [www.bnet.com](http://www.bnet.com), GameSpot UK (video gaming) [www.gamespot.com](http://www.gamespot.com), and TV.com (TV gossip and fan discussion) [www.tv.com](http://www.tv.com). CBS Interactive is a premium international content network and global top ten internet property.



But there are some bright sides to these changing circumstances. There is a stronger emphasis on ensuring IT applications have a better fit with business processes. Improved access to information is rated very highly, with half the respondent base willing to spend up to £50 thousand on technology products and services within the next 12 months, and more than 10% willing to spend more than £10 million over the next year. The money is there, but people want to spend it wisely.

Some of the most significant intended areas of expenditure over the next 12 months are in the data centre and end user hardware. Other popular areas of expenditure are in web applications, network security, virtualisation, enterprise-wide information access, mobile working solutions and unified communications. These are investments in the future, and as such are signs of optimism.

Green IT and carbon footprint reduction, although widely discussed in the press, are not generally considered to be a high priority by a majority of UK IT departments. Initiatives to reduce power consumption and improve efficiency are often considered to be part of a long term strategy, but plans for implementation are in most cases not likely to be considered within the next 6-12 months.

When comparing the responses by small, medium and large enterprises, it is very much the smaller organisations which are more likely to focus their IT priorities on customer and partner expectations, service responsiveness and increased productivity, while it is the medium to larger organisations which are more likely to focus on internal cost saving objectives, IT logistics and decreasing IT budgets through a more formalised approach to IT best practice and efficiency. Less tangible issues, like Green IT, are also much more important to larger organisations, which tend to have more resources to concentrate on such matters.

## About CNET Direct

CNET Direct is a division of CBS Interactive International with operations in Australia, China, France, Germany, Singapore, Taiwan, and the United Kingdom. CNET Direct aggregate the audiences across CBS Interactive's media properties and via customised marketing solutions help technology marketers reach IT decision makers and other professionals in 260 countries.

CNET Direct services include database list rental, email messaging, telemarketing services, interactive productions, campaign execution, management and post-campaign analysis.  
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IT investment, like the economy and so many other aspects of human life, tends to go in cycles. This survey shows that we are perhaps at the lower end of a cycle, but also that investments are occurring that indicate optimism for the future, with many important new investments beginning to occur.

## Respondent Base

CBS Interactive’s IT Insights and Priorities 2009 research is based on an online survey of 880 UK IT decision makers across a wide spectrum of IT job functions from CIOs, IT Directors and IT Managers to Network, Infrastructure, Security, Database, Software, Applications, Web and Support specialists.

Respondents to the 15 question online survey were generated through email marketing activity to CNET Directs permission email database of 210,000 UK Business IT Professionals plus online advertising across CBS Interactive online business IT properties; ZDNet UK, Silicon and Tech Republic.

Respondents come from many different sizes of organisations (respondents representing one-person organisations were excluded from the analysis). The largest single group (24.9%) were from organisations with 2 to 9 employees, but nearly one third (14.8% plus 14.9%) were from organisations with more than 1,000 employees.

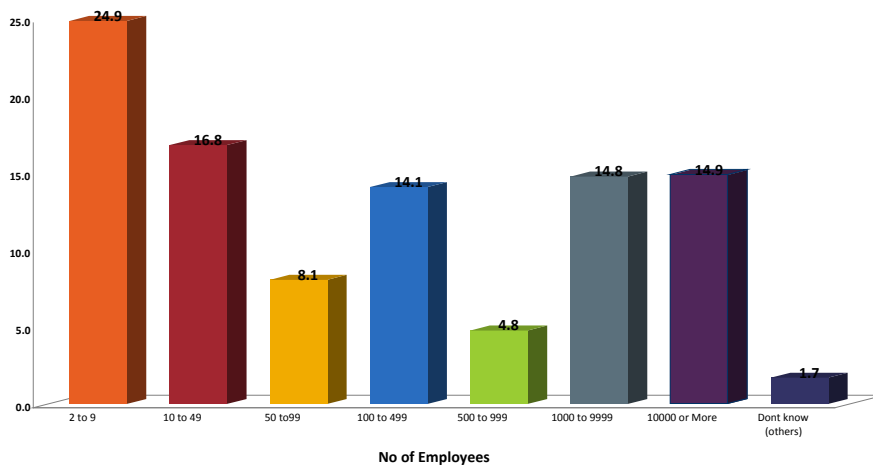
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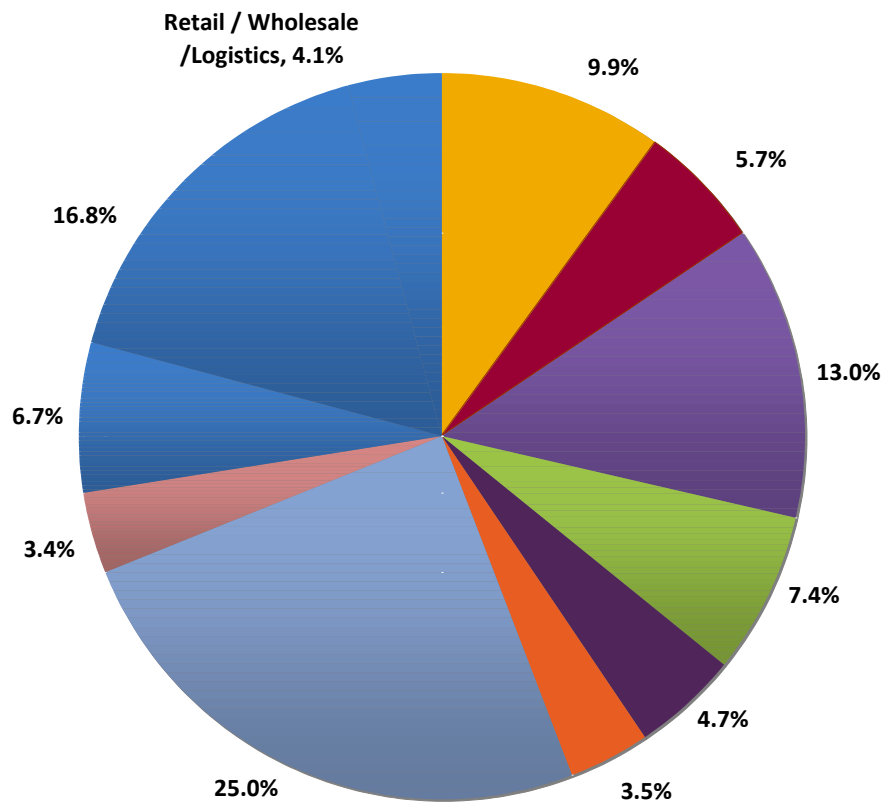
## Data analysis by Connection Research

Connection Research is an Australian market research and analysis company with a focus on the consumer usage of digital technology. Its primary methodology is demand-side research, surveying consumers of technology about usage patterns, attitudes and plans.

[www.connectionresearch.com.au](http://www.connectionresearch.com.au)



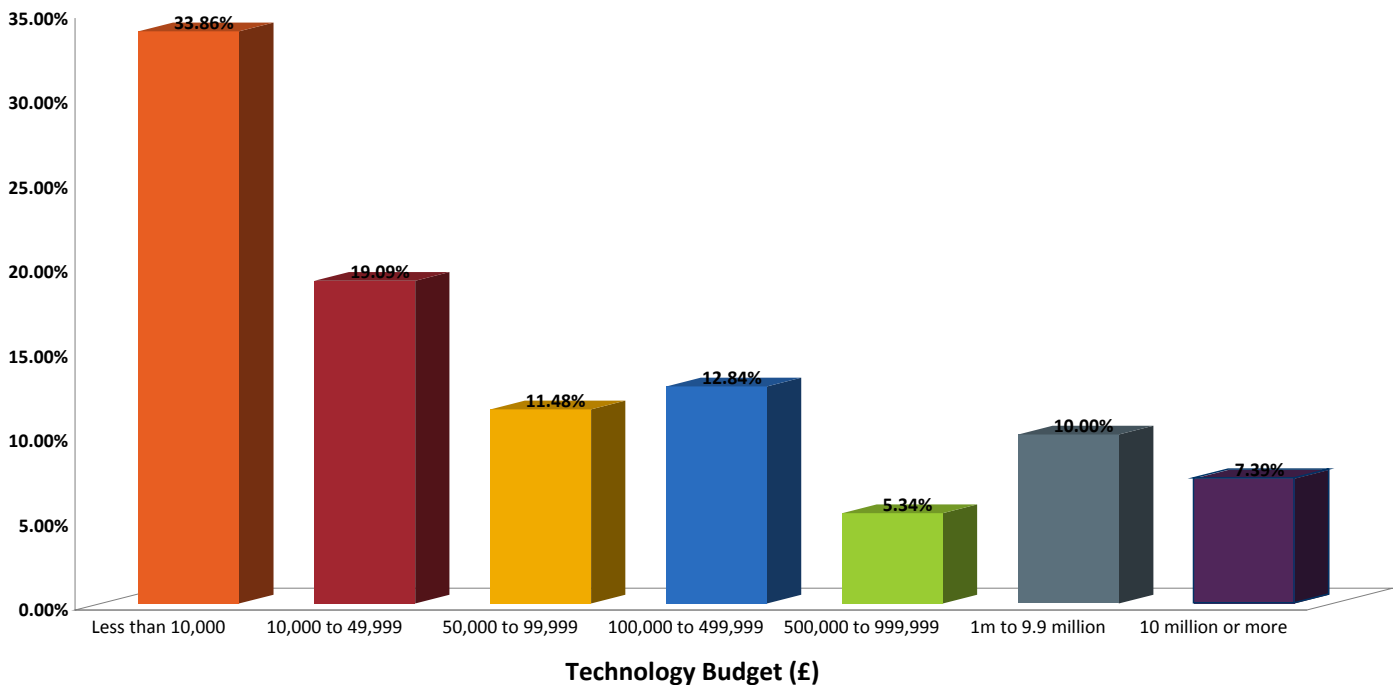
Respondents come from a wide range of different industry sectors. One quarter (25.0%) come from IT related industries and one in ten respondents work in education and R&D related industries (13.0%), business services (9.9%), retail/ banking/ insurance (7.4%).



- Business Services
- Construction / Utilities / Mining
- Education / R&D
- Finance / Banking / Insurance
- Government
- Healthcare
- Media / Telecoms / Entertainment
- Other
- Retail / Wholesale / Logistics

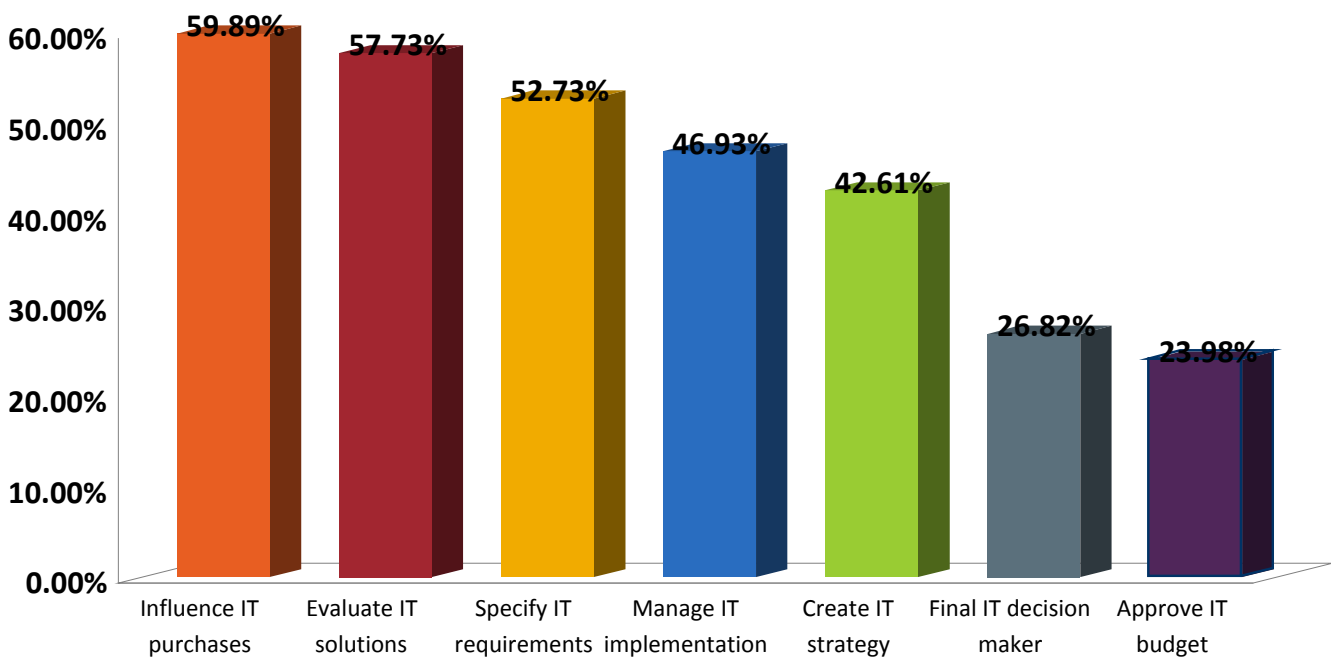
Half of the respondents (53.0%) are willing to spend up to £50,000 (GBP) on technology products and services within the next 12 months.

One in ten (7.4%) are prepared to spend more than £10 million. Nearly one third (33.9%) will spend less than £10,000.



Two thirds (59.9%) of the respondents influence IT purchases and nearly as many are involved with evaluation of their organisation's IT solutions (57.7%). More than half specify IT requirements (52.7%).

More than one in ten (13.3%) are not involved in any IT strategy or implementation at all.



### Involvement in IT strategy