

**Cloud for
Business
Managers
in Midsize
Organisations:
the Good,
the Bad &
the Ugly**

**Independent Market
Research Report**

Commissioned by
ORACLE

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1. Background and introduction:

This research set out to investigate the ways in which line of-business managers in mid-sized organisations across the world with revenues of £50 million to £499 million are using cloud apps in their departments. It explores their motivations for adopting cloud apps, how easily they are able to share information generated within the apps across the company and any problems they have encountered in this respect. The findings show that the adoption of cloud apps across the world is remarkably high and in all departments, but that integration problems are endemic. The key findings are summarised below.

Key findings

Adoption of cloud applications:

- 33% of midsize organisations around the world say the cost of top-of-the range software and IT systems has prevented their company buying best-in-class business applications.
- In addition, 57% agree that cloud computing allows access to top-quality business applications.
- Indeed, 74% of midsize organisations have adopted cloud applications.
- 75% of adopters say their motivation was to get quick access to software, while 47% took on the apps to get access to more appropriate software for their department.

Reliability and functionality of cloud applications:

- However, 55% say their department has experienced staff downtime in the last 6 months due to cloud integration problems.
- 55% say project deadlines have been missed in the last 6 months due to cloud integration problems.
- 84% have been prevented from getting the best out of their departmental cloud applications - 25% blame poor integration.
- 21% complain the apps are not usable on mobile devices, which has prevented them from getting the best out of the cloud.
- 76% say their ability to innovate using their cloud apps has been hindered and the main hindrance is a lack of integration (54%).
- Indeed, 50% of companies have abandoned the use of at least 1 departmental cloud app in the last 3 years due to integration problems, and at a frequency of 4 apps dropped per year on average.

Reliability and functionality of cloud applications:

- Yet, 83% of all respondents think it is important that cloud applications are fully integrated with each other and with other software in the organisation.
- 84% think it is important for all senior managers to be able to access on their mobile devices multiple business cloud apps simultaneously where the apps can talk to each other and integrate business data and information from app to app.
- Yet only 54% of mid-sized companies have a formal cloud strategy aligned with the strategic direction of the business that has been discussed and approved at CEO / Board level.
- Surprisingly, 49% claim to have integrated cloud apps, where they are able to access cloud data in other departments directly from within the business application used by their own department, leaving roughly 1 in 2 unable to do this.
- But among this lucky 49%, integration seems to be only partial, covering some apps / processes / departments.
- Indeed, 69% of cloud adopters have attempted integration, but 87% of these encountered negatives along the way - in fact, 55% have tried and failed.
- Mid-sized companies have invested £46,555 on average on integration, but figures rise to over £2 million for one company.
- 42% of cloud users have encountered usability issues with the cloud apps in their department.
- 31% have had to rely on the IT department for help with their cloud apps.
- 42% have seen a data security breach in their department associated directly with the use of cloud apps - averaging 5 incidents per department in the last 12 months.
- 72% say having cloud data handled externally by one or more cloud vendors makes it hard for their department to be compliant.
- 81% of all respondents were not completely aware that many niche cloud application vendors contract out to other cloud vendors data management services.

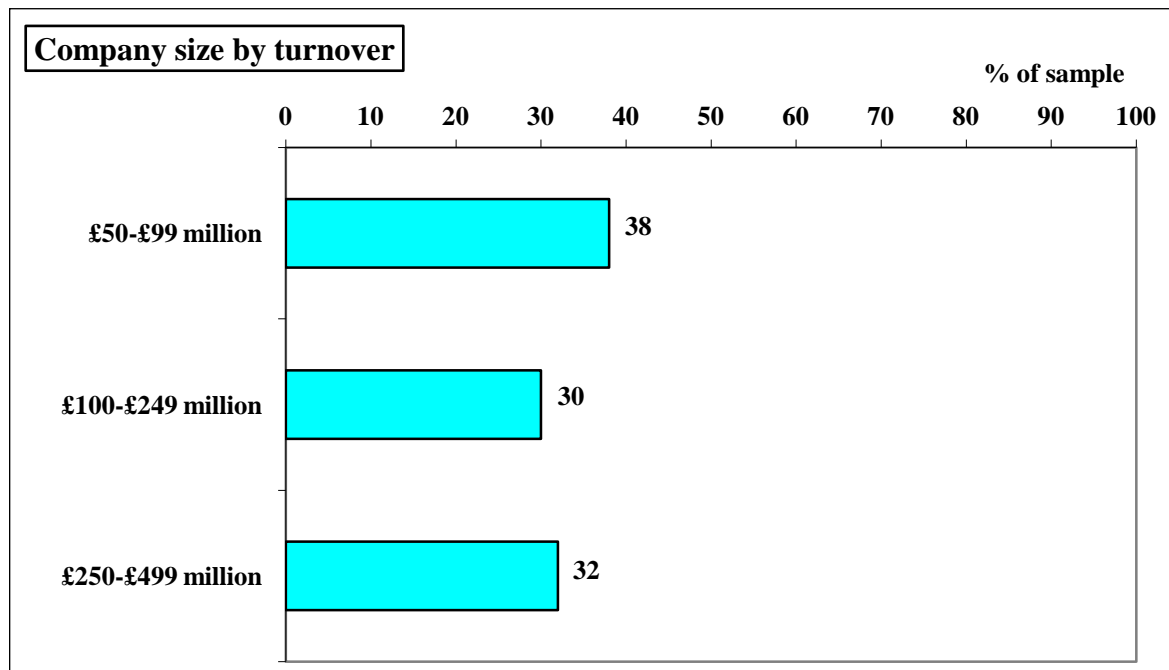
2. Research Methodology

2.1 Overview:

This report was commissioned by Oracle and details quantitative research with senior decision makers in mid-sized organisations in 17 countries across the world. This document is a sister report to one published earlier in 2013 which included this data for mid-sized companies, as well as data for larger companies. However, all the data presented in this report relates ONLY to mid-sized companies.

2.2 Quantitative Research:

For this report, total of 877 surveys was collected from companies with revenues of £50 million to £499 million. All respondents confirmed prior to interview the size of their organisation by turnover, as well as their job role / department and level of seniority within it. Countries sampled include the UK, France, Germany, the Nordics, Spain, Italy, UAE, South Africa, Russia, Turkey, Hungary, the USA, Australia, China, Singapore, India and Brazil.



The sample is made up of companies of different sizes, with 32% being larger corporations with revenues of £250-499 million. However, the sample is fairly evenly distributed across the various turnover bands.

The sample covers a wide variety of industry sectors and all the main sectors are well represented. The sample includes respondents at a variety of levels of seniority, including those at director, C- and VP level. It also includes a wide variety of line-of-business managers and all the main departments are adequately represented across this large sample. IT professionals were deliberately excluded from the sample.

2.3 Comparative Analysis:

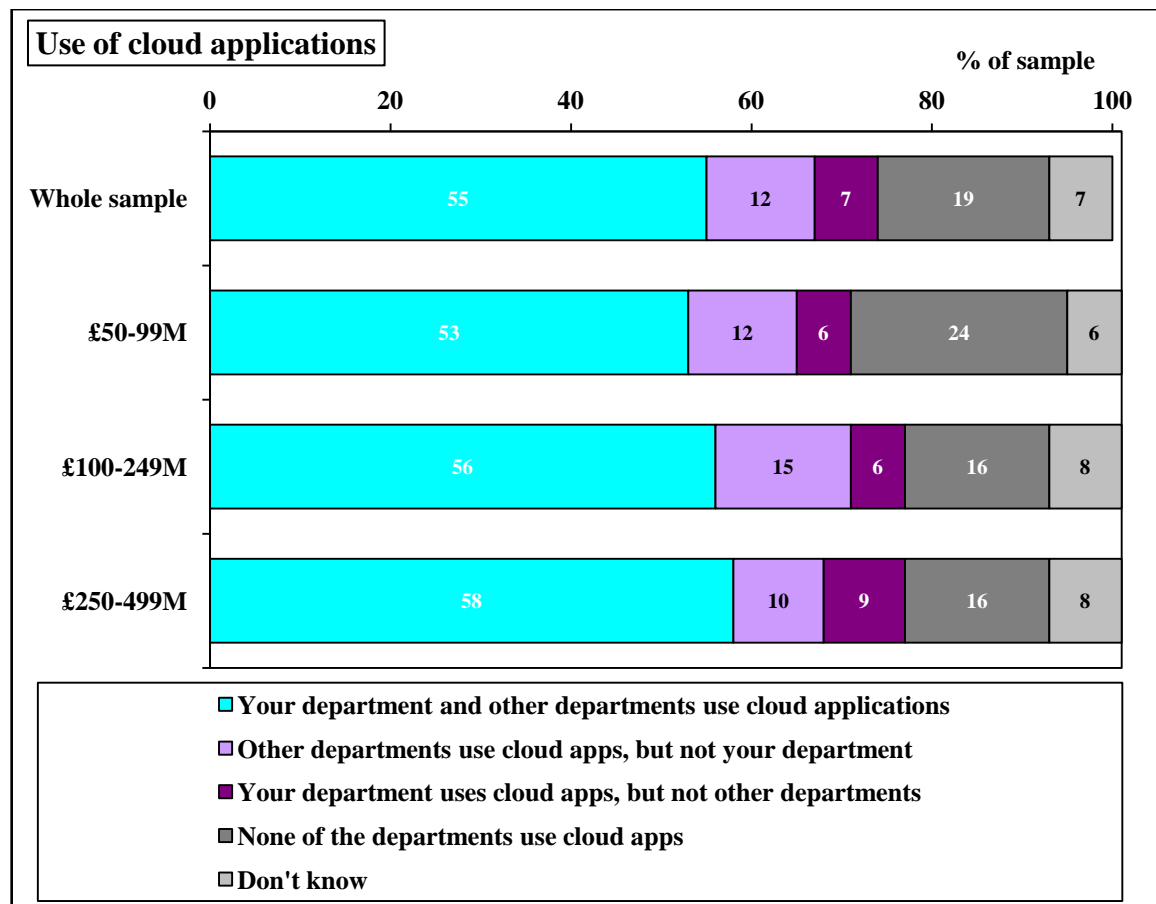
The findings of the survey have been analysed and compared according to company size. Any differences that are significant at a 95% confidence level are described accordingly in this report.

Throughout this report, where any numbers do not add up to 100%, it is either because respondents were allowed to select more than one tick-box option in the question, or because of minor rounding errors, which should be ignored.

The interviews were conducted using a global online panel between 25th March and 10th April 2013. Before and during the interviews, respondents were not aware that Oracle had commissioned the research.

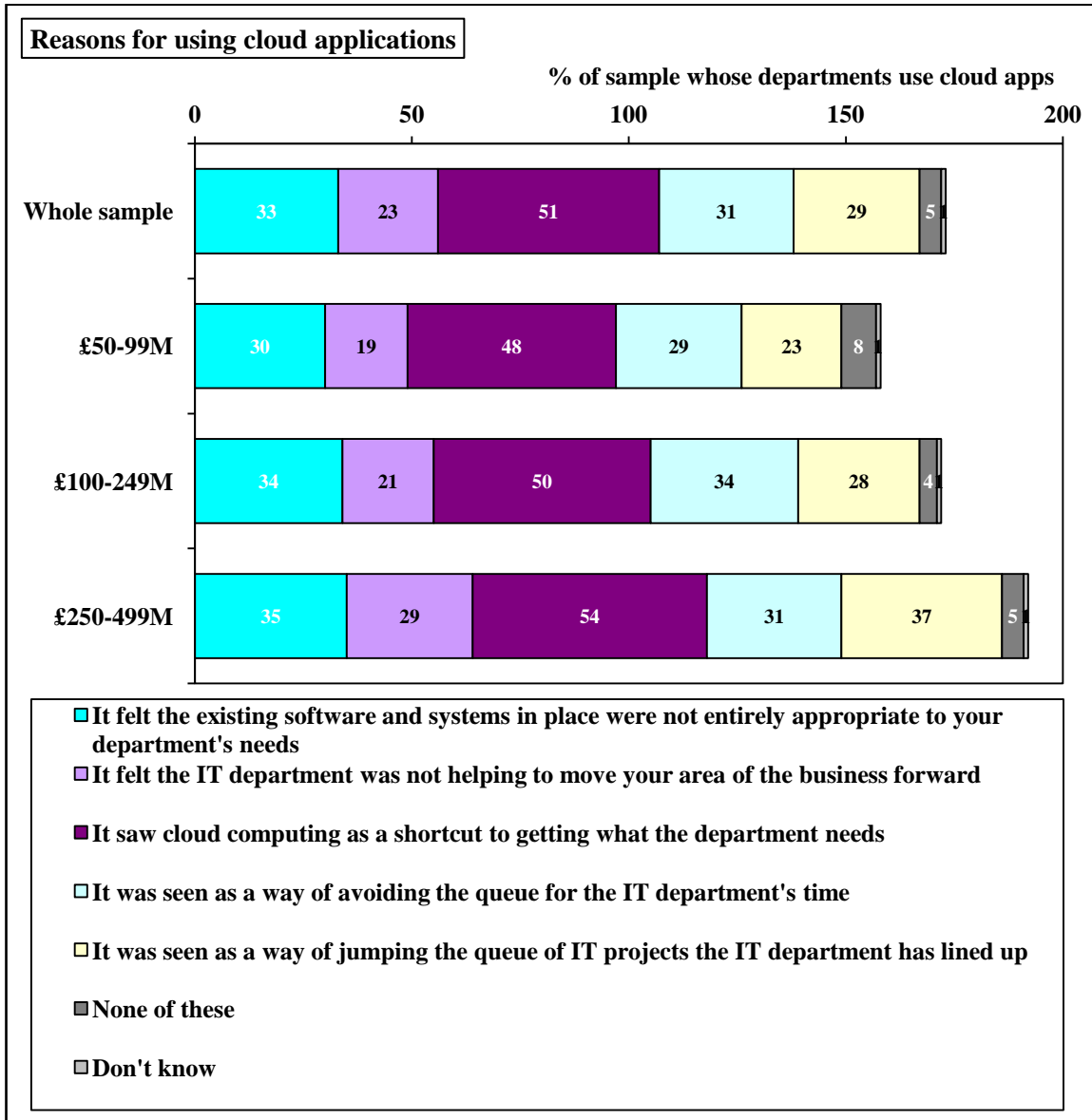
3. Research Findings

3.1. Which of the following applies to your organisation?



- Collectively, 74% of these mid-sized organisations with £50M-£499M turnover use cloud applications.
- In more detail, 55% of respondents say their department and other departments use cloud applications.
- Far fewer say other departments use cloud apps, but their department does not (12%).
- Conversely, only 7% say their department uses cloud apps, but other departments do not.
- In contrast, just 19% of organisations say none of the departments in their company uses cloud apps.
- Another 7% are unsure on this issue.
- Across the different size bands, more of those with revenues of £50-99M (24%) say none of their departments uses cloud applications, compared to the other two size bands (both 16%).
- Also, more of those with revenues of £250-499M (67%) say their department uses cloud applications, compared to those with £50-99M (59%) [not shown].

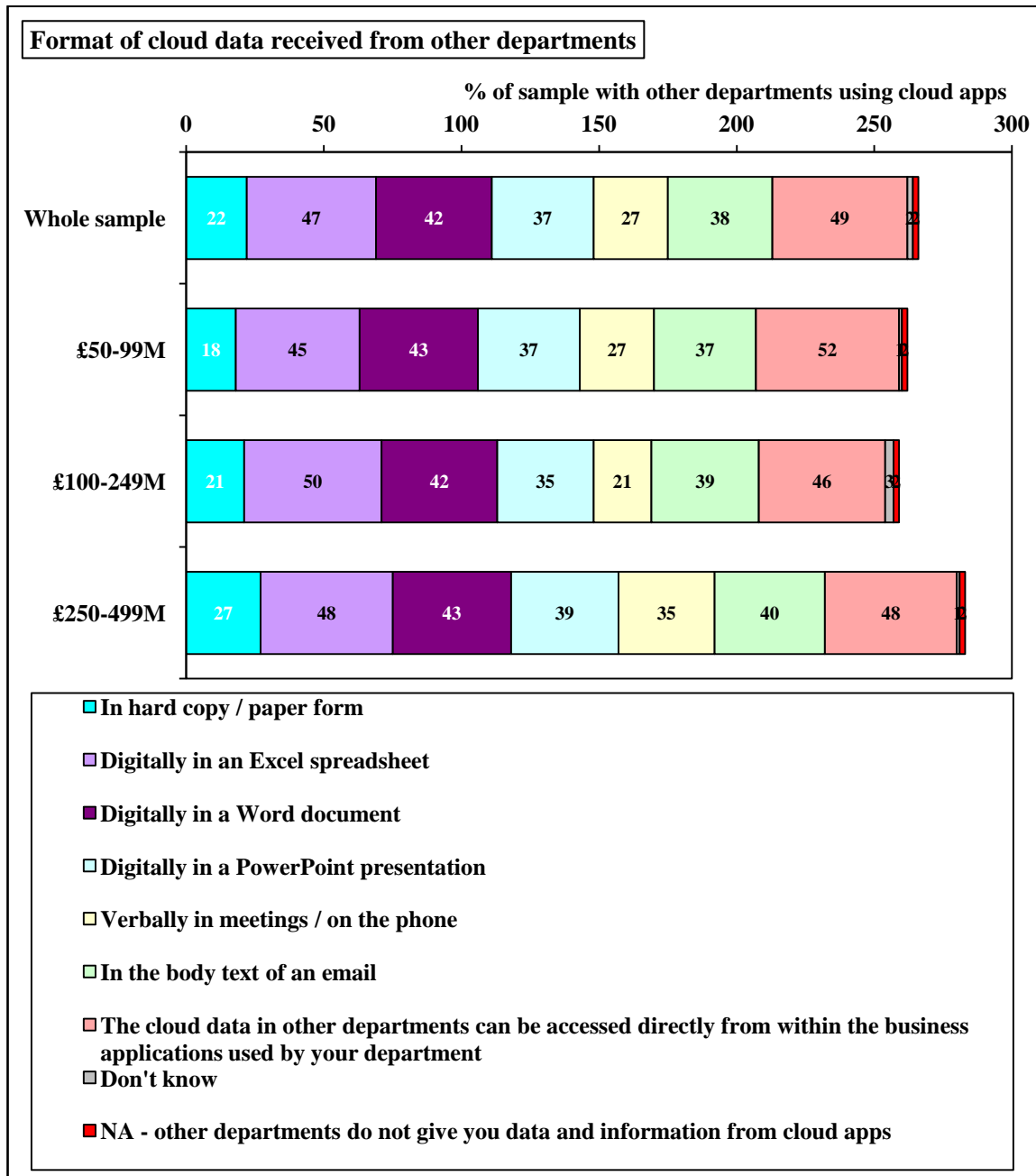
3.2. [Just to those whose departments use cloud apps] Which of the following account for why your department decided to use cloud applications?



- Among those whose departments use cloud apps, the biggest reason for using them is because the department saw cloud computing as a shortcut to getting what the department needed (51%).
- Closely related to this is the fact that 31% saw cloud computing as a way of avoiding the queue for the IT department's time and a similar proportion (29%) says it was a way of jumping the queue of IT projects the IT department had lined up.
- Indeed, collectively, 75% selected at least 1 of these three options, meaning their motivation was to have a quick way to get the software they wanted [not shown].
- This might be partially explained by the fact that 33% adopted cloud computing in their department because they felt the existing software and systems in place were not entirely appropriate to their department's needs.

- Also, 23% felt the IT department was not helping to move their area of the business forward.
- Indeed, collectively, 47% were motivated by at least one of these two options, suggesting almost 1 in 2 took on cloud apps to get access to more appropriate software [not shown].
- Across the size bands, more companies with revenues of £250-499M (29%) say they felt the IT department was not helping to move their area of the business forward, compared to those with £50-99M (19%).
- Also, more companies with revenues of £250-499M (37%) also say cloud was seen as a way of jumping the queue of IT projects the IT department had lined up, compared to those with £50-99M (23%).

3.3. [Just to those with other departments using cloud apps] When you receive data / information that originates from cloud applications used by other departments, how is it given to you?



- Where other departments use cloud apps, 98% of such companies share information derived from the cloud apps across departments.
- While 49% claim to be able to access cloud data in other departments directly from within the business application used by their own department, this means roughly 1 in 2 cannot do this.
- In fact, just 16% only access cloud data in other departments directly from within the business applications used by their own department [not shown].

- Indeed, 61% receive cloud app data / information from other departments in a wide variety of ways, with the average number of different ways being 3 [not shown].
- In more detail, 22% receive data in hard copy / paper form.
- 47% receive it digitally in an Excel spreadsheet, while 42% receive Word documents with the information in and another 37% receive the information in PowerPoint.
- Another 38% receive information and data from cloud apps in the body text of emails.
- In fact, 76% receive data in at least one of these non-automated digital forms [not shown].
- Finally, 27% receive such data verbally in meetings and / or on the phone.
- In contrast, 2% are unsure which of these apply to them and 2% say they do not receive cloud data from departments that use cloud apps.
- Across the revenue bands, more companies with revenues of £250-499M (27%) receive data in hard copy / paper form, compared to those with £50-99M (18%).
- Also, more companies with revenues of £250-499M (35%) receive information and data from cloud apps verbally in meetings and / or on the phone, compared to those with £100-249M (21%).
- However, statistically, there is no difference according to size and the proportion of companies that claim to be able to access cloud data in other departments directly from within the business application used by their own department.

Missed project deadlines

3.4. [Just to those whose organisation uses cloud apps] How many times in the last 6 months has a lack of cloud data being shared effectively across the company led to project deadlines being missed?

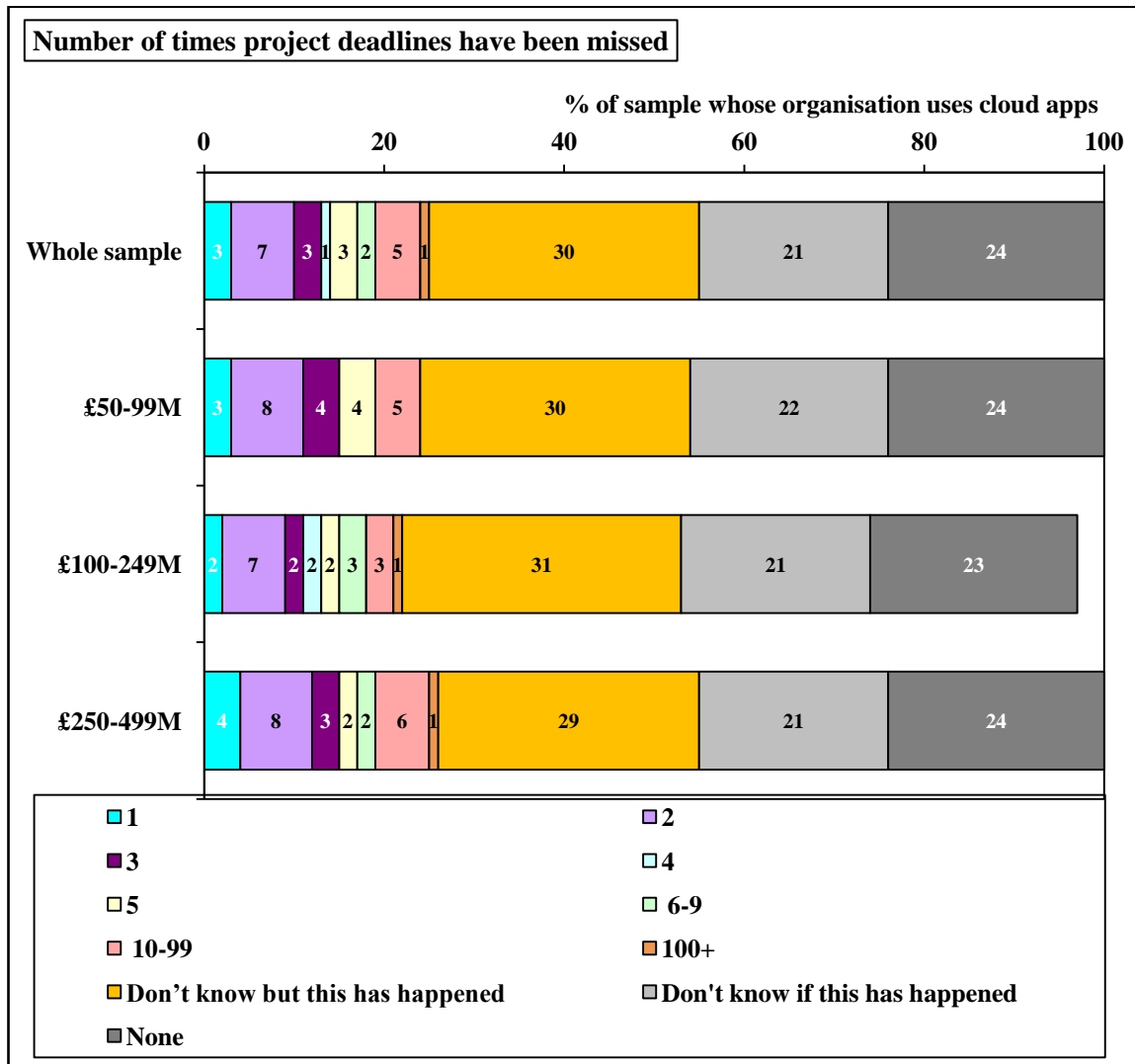


Table 3.4.1: Number of times project deadlines have been missed

Country	Average	Median	Min	Max
Whole sample	11	3	1	180
£50-99M	5	3	1	20
£100-249M	16	4	1	180
£250-499M	12	3	1	150

- Collectively, 55% of companies that use cloud apps say project deadlines have been missed in the last 6 months due to a lack of cloud data being shared effectively across the company.
- Indeed, only 24% are adamant this has not happened, whereas another 21% admit they do not know if it happened or not.
- Another 30% say it has happened, but they are not sure exactly how frequently during the last 6 months.

- Among those who cited a figure, the average number of times is 11, whereas the median is 3.
- Across the size brackets, those in companies with revenues of £100-249M have a higher average number of missed project deadlines (16), compared to those with £50-99M (5).

Staff downtime episodes

3.5. [Just to those whose organisation uses cloud apps] How many times in the last 6 months has your department experienced downtime where people were unable to perform their job properly due to problems associated with cloud applications not being integrated properly across the company?

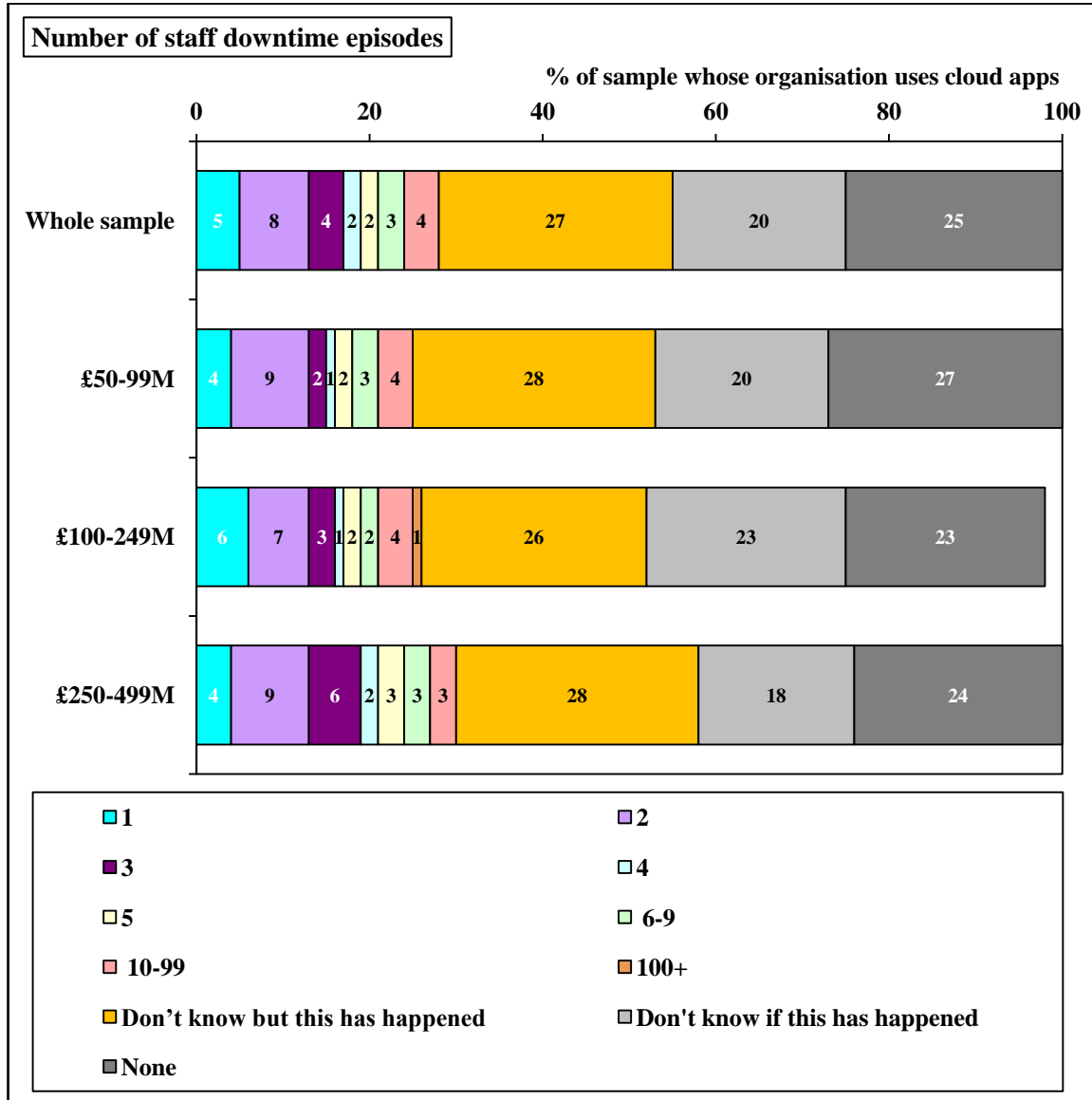


Table 3.5.1: Number of times downtime has occurred

Country	Average	Median	Min	Max
Whole sample	9	3	1	350
£50-99M	5	2	1	20
£100-249M	16	3	1	350
£250-499M	8	3	1	200

- Collectively, 55% of companies that use cloud apps say their department has experienced staff downtime in the last 6 months where people have been unable to perform their jobs properly due to problems associated with cloud applications not being integrated properly across the company.

- Indeed, only 25% are adamant this has not happened, whereas another 20% admit they do not know if it happened or not.
- Another 27% say it has happened, but they are not sure exactly how frequently during the last 6 months.
- Among those who cited a figure, the average number of downtime incidents is 9 during the last 6 months, whereas the median is 3.
- Statistically, there is no difference according to company size and the number of times their department has experienced staff downtime in the last 6 months due to problems associated with cloud applications not being integrated properly across the company.

Abandoning cloud apps

3.6. [Just to those whose organisation uses cloud apps] How many times in the last 3 years has your organisation abandoned the use of a particular cloud application due to it not being integrated?

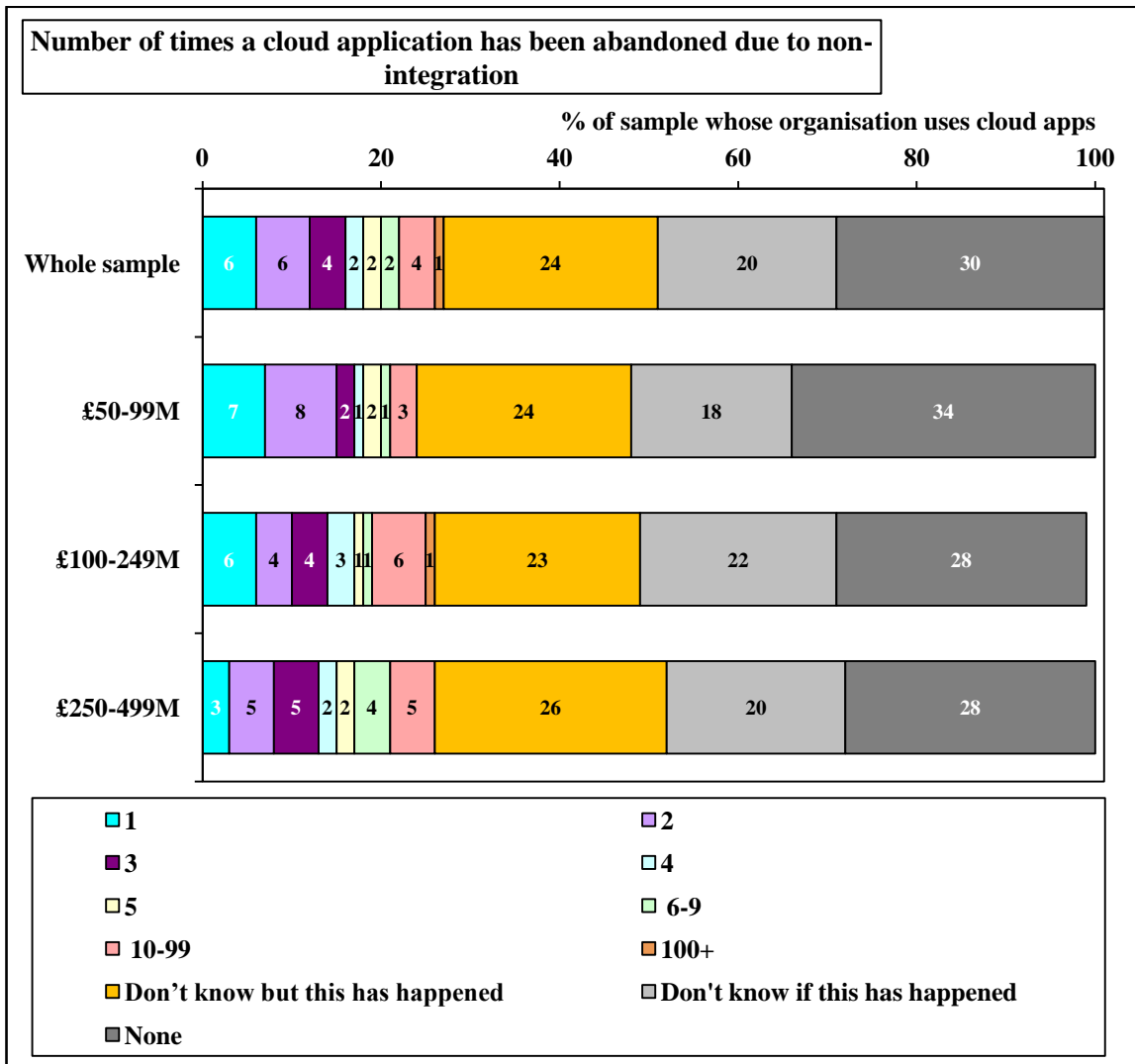


Table 3.6.1: Number of times the use of cloud applications has been abandoned

Country	Average	Median	Min	Max
Whole sample	12	3	1	550
£50-99M	6	2	1	100
£100-249M	20	3	1	550
£250-499M	10	4	1	234

- Collectively, 50% of those whose companies use cloud apps say their organisation has abandoned the use of a particular cloud app in the last 3 years due to it not being integrated.
- 24% say it has happened, but they are not sure exactly how frequently during the last 3 years.
- In contrast, 30% say this has not happened, whereas another 20% admit they do not know if it happened or not.

- Among those who cited a figure, the average number of times they have abandoned cloud apps due to integration issues is 12, whereas the median is 3.
- 5% cited a figure above 9; it is possible that they have misunderstood the question and are referring to when a manager abandons a particular task performed using a cloud app, rather than the company completely abandoning its use of the cloud application altogether (as stated in the wording of the question).
- These high figures pull the average figures up, and therefore the median figure of 3 might be more reliable in this instance.
- Statistically, there is no difference according to company size and the number of times an organisation has abandoned the use of a particular cloud app in the last 3 years due to it not being integrated.

Cost of cloud integration

3.7. [Just to those whose organisation uses cloud apps] If your organisation has attempted to integrate any cloud apps it uses with each other and / or with other software and systems in the company, roughly how much has this cost the organisation to date to perform this task?

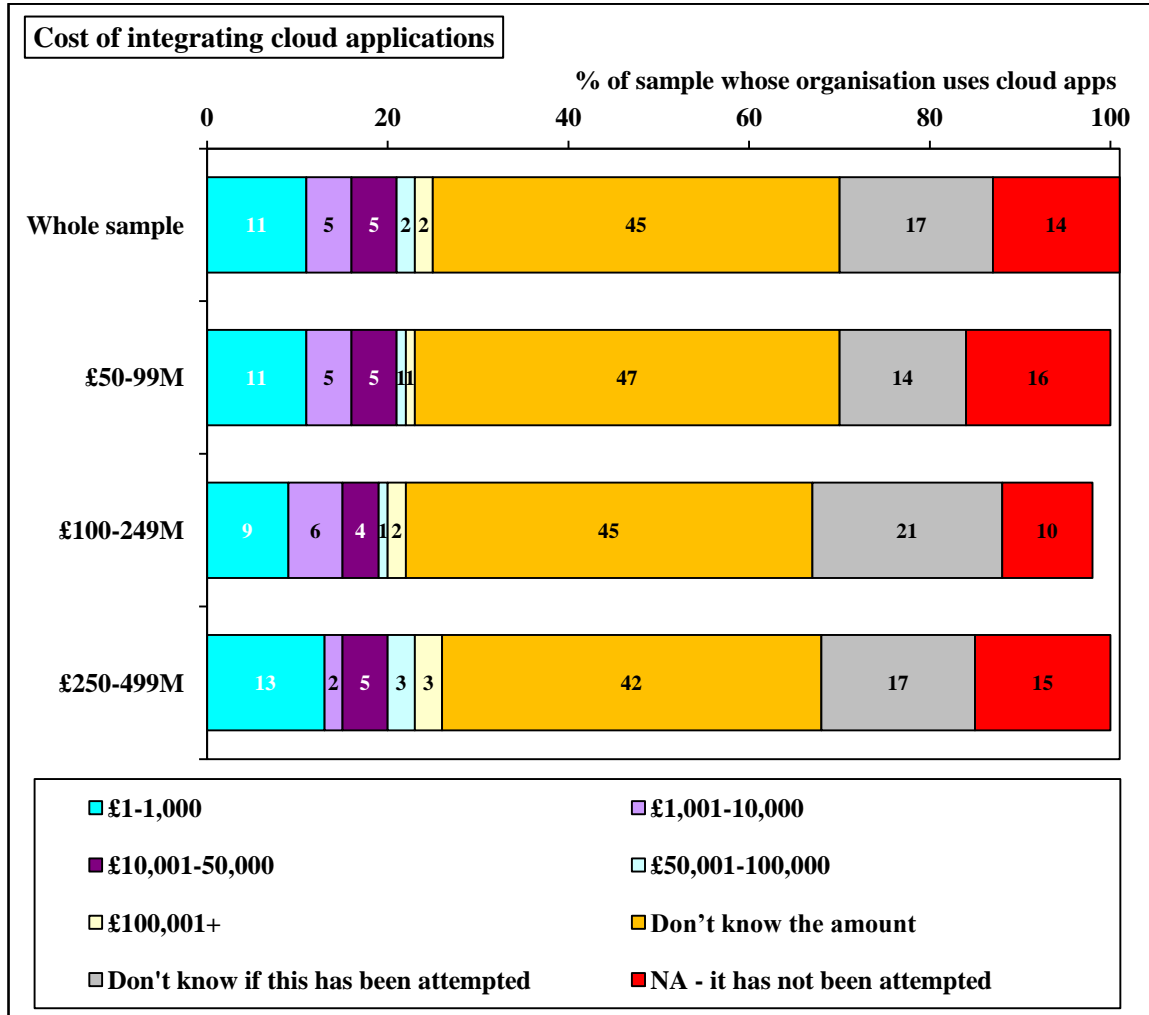


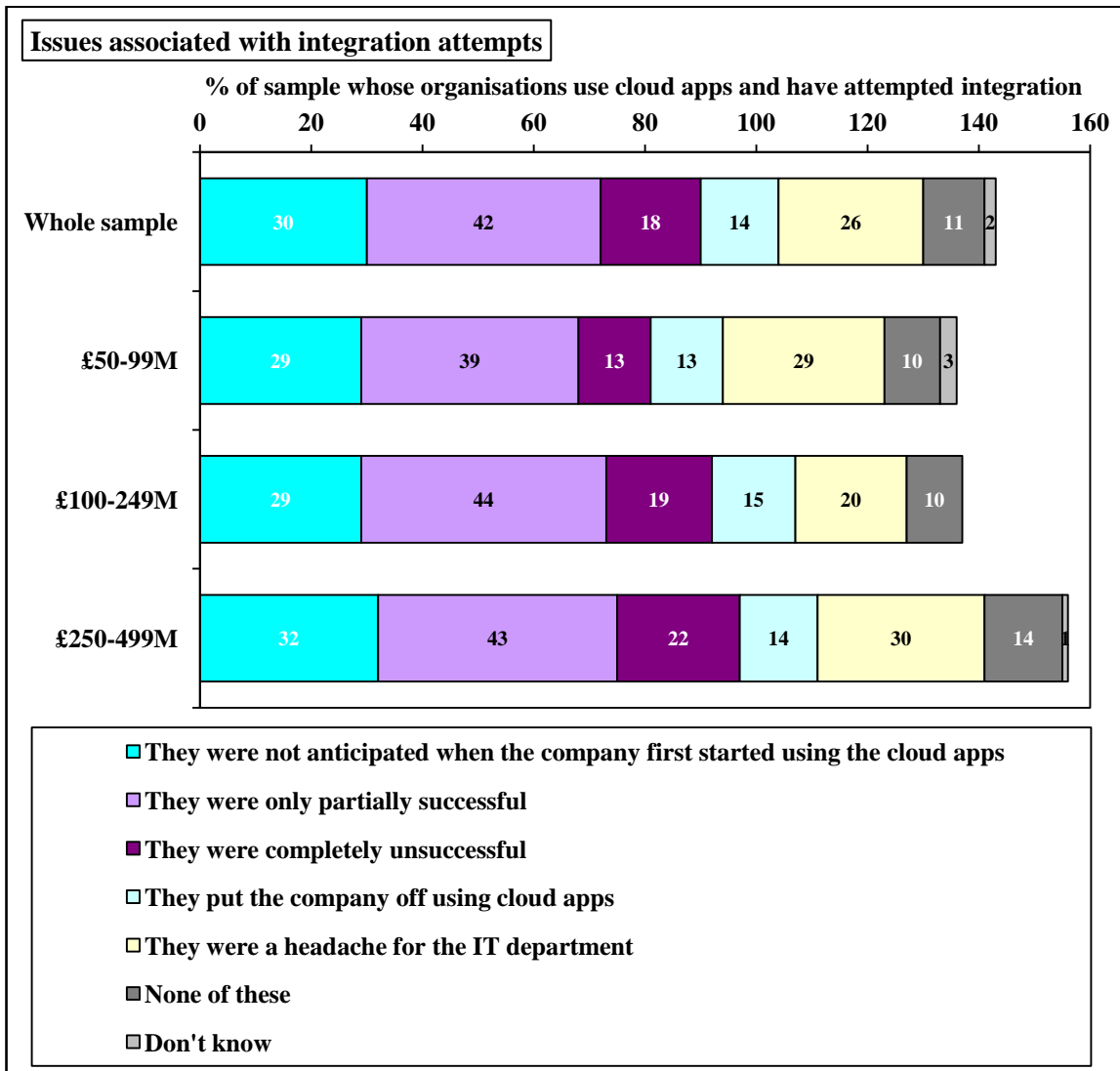
Table 3.7.1: Cost of attempted integration episodes

Country	Average (£)	Median (£)	Max (£)
Whole sample	46,555	2,000	2,098,440
£50-99M	15,502	1,634	209,844
£100-249M	47,656	2,325	524,610
£250-499M	78,342	2,549	2,098,440

- Among those with cloud apps used by the company, 69% have attempted to integrate them with other cloud apps and / or software and systems used by the company.
- While 45% say they do not know the amount of money spent on this effort, among those who were able to cite a figure, on average, companies have invested £46,555 to date on such integration attempts, but figures rise to £2.1 million for one company.

- In addition, another 17% are unsure if such integration attempts have been made, while 14% are certain they have not.
- Statistically, there is no difference according to company size and the proportion of organisations that have attempted to integrate their cloud apps with other cloud apps and / or software and systems used by the company.
- However, the amount of money invested in such integration attempts rises with increasing size of the company.

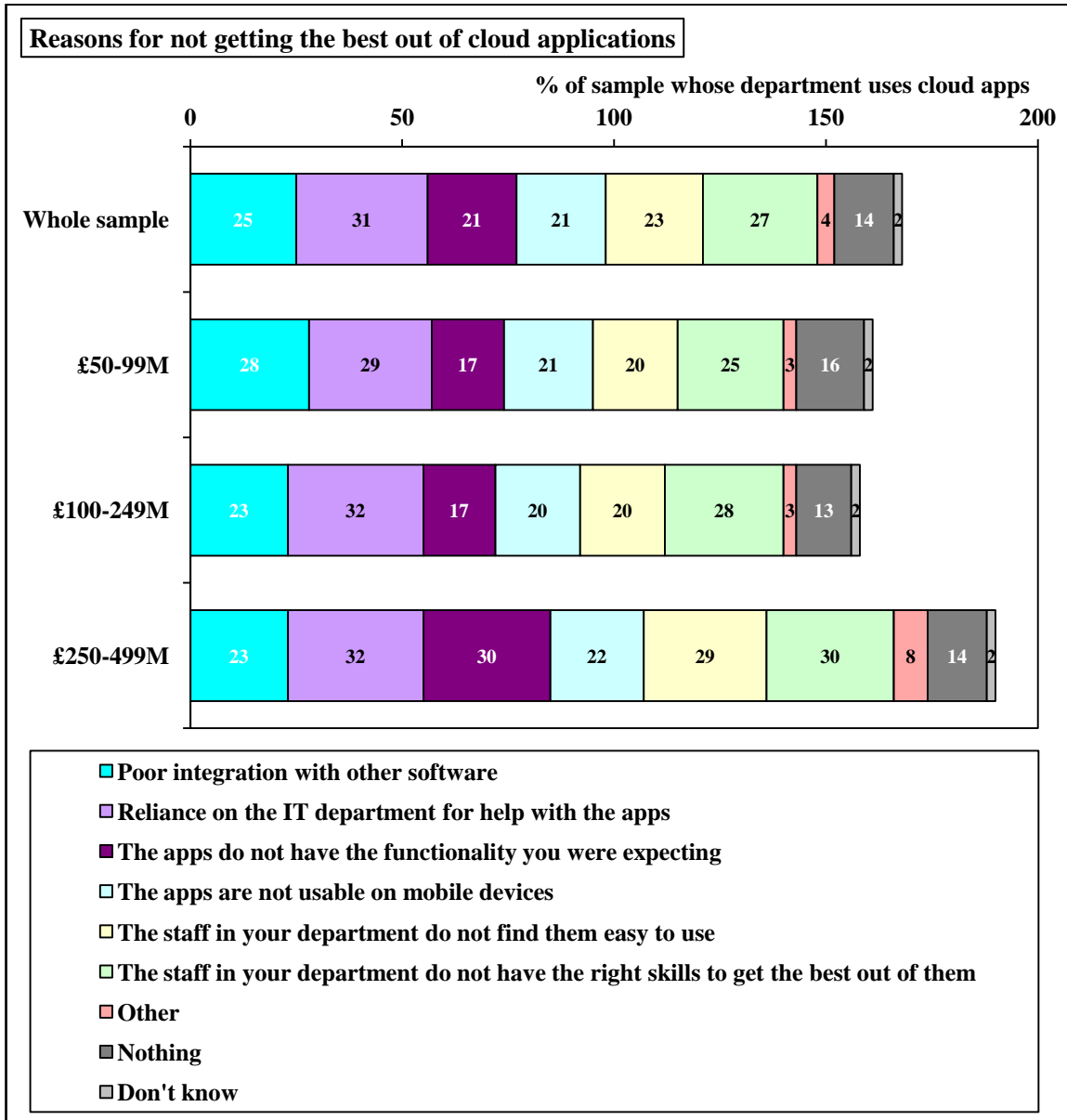
3.8. [Just to those whose organisations use cloud apps and have attempted integration] Which of the following apply to the integration attempts?



- Among those who have attempted integration, 87% encountered negatives along the way.
- 30% say integration attempts were not anticipated when the company first started using cloud apps.
- Another 26% say they became a headache for the IT department.
- But 42% say they were only partially successful and another 18% say they were completely unsuccessful.
- Together, this means 55% of these companies did not have completely successful integration attempts [not shown].
- However, only 14% say the company was put off using cloud apps due to the integration issues.

- In contrast, just 11% say none of these negative aspects applied to their integration attempts, and another 2% are unsure on the issue.
- Across the size bands, more companies with revenues of £250-499M (22%) say their integration attempts were completely unsuccessful, compared to those with £50-99M (13%).

3.9. [Just to those whose department uses cloud apps] Which of the following, if any, have prevented you from getting the best out of the cloud applications your department uses?



- Collectively, 84% of people that use cloud apps in their own department say they have been prevented from getting the best out of the cloud applications their department uses for one reason or another.
- 25% say poor integration with other software has meant they have not been able to get the best from their cloud apps, while 31% say they have had to rely on the IT department for help with the apps.
- 21% do not think their apps have the functionality they were expecting, while another 21% complain that they are not usable on mobile devices.

- 23% say staff in the department do not find it easy to use the apps, while another 27% say staff in the department do not have the right skills to get the best out of the apps they are using.
- Together, this means that 42% of those using cloud apps have encountered usability issues [not shown].
- 4% say there are other reasons why they have not been able to get the best out of their apps.
- In contrast, 14% say nothing has prevented them from getting the best out of the cloud applications their department uses and another 2% are unsure on this issue.
- Across the size bands, more companies with revenues of £250-499M (30%) say their apps do not have the functionality they were expecting, compared to those with £50-99M and £100-249M (both 17%).
- Also, more companies with revenues of £250-499M (29%) say staff in the department do not find it easy to use the apps, compared to those with £50-99M and £100-249M (both 20%).

3.10. [Just to those whose department uses cloud apps] In the last 12 months, how many times have you witnessed a data security breach in your department associated directly with the use of cloud applications?

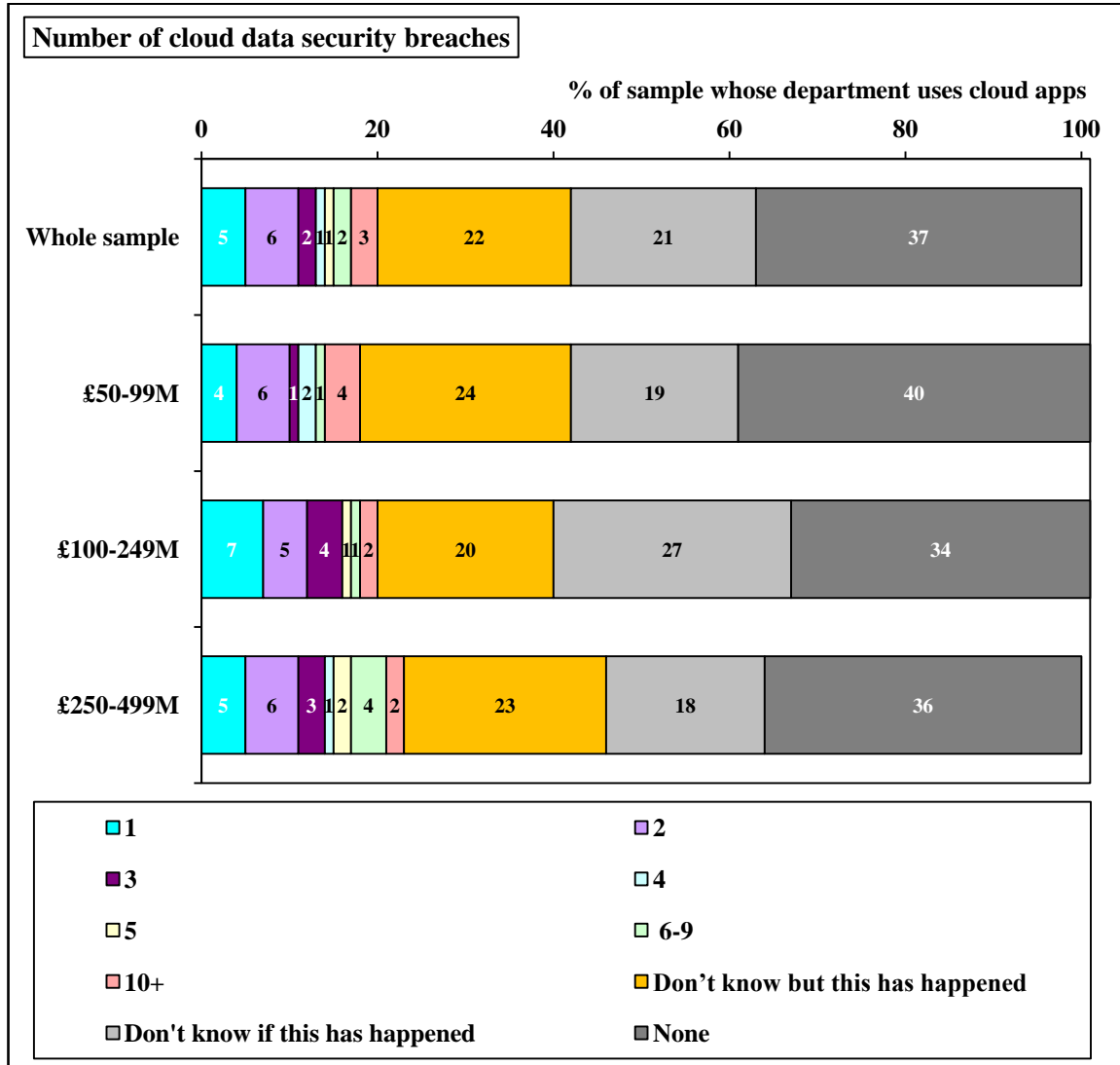


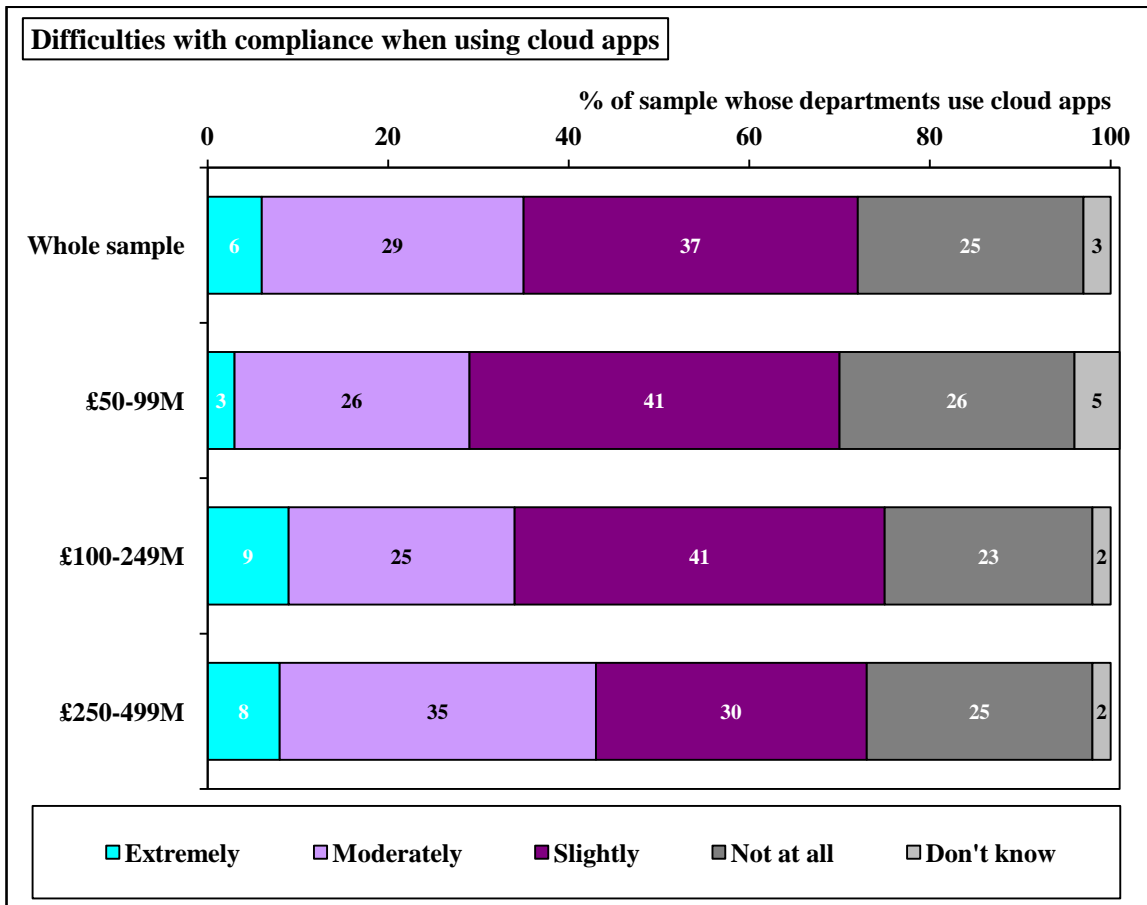
Table 3.10.1: Number of times a data security breach has been witnessed

Country	Average	Median	Min	Max
Whole sample	5	2	1	89
£50-99M	5	2	1	20
£100-249M	4	2	1	44
£250-499M	6	2	1	89

- In the last 12 months, 42% of respondents whose departments use cloud apps have seen a data security breach in their department associated directly with the use of cloud applications.
- 22% say this has happened, but they are not sure of the frequency.

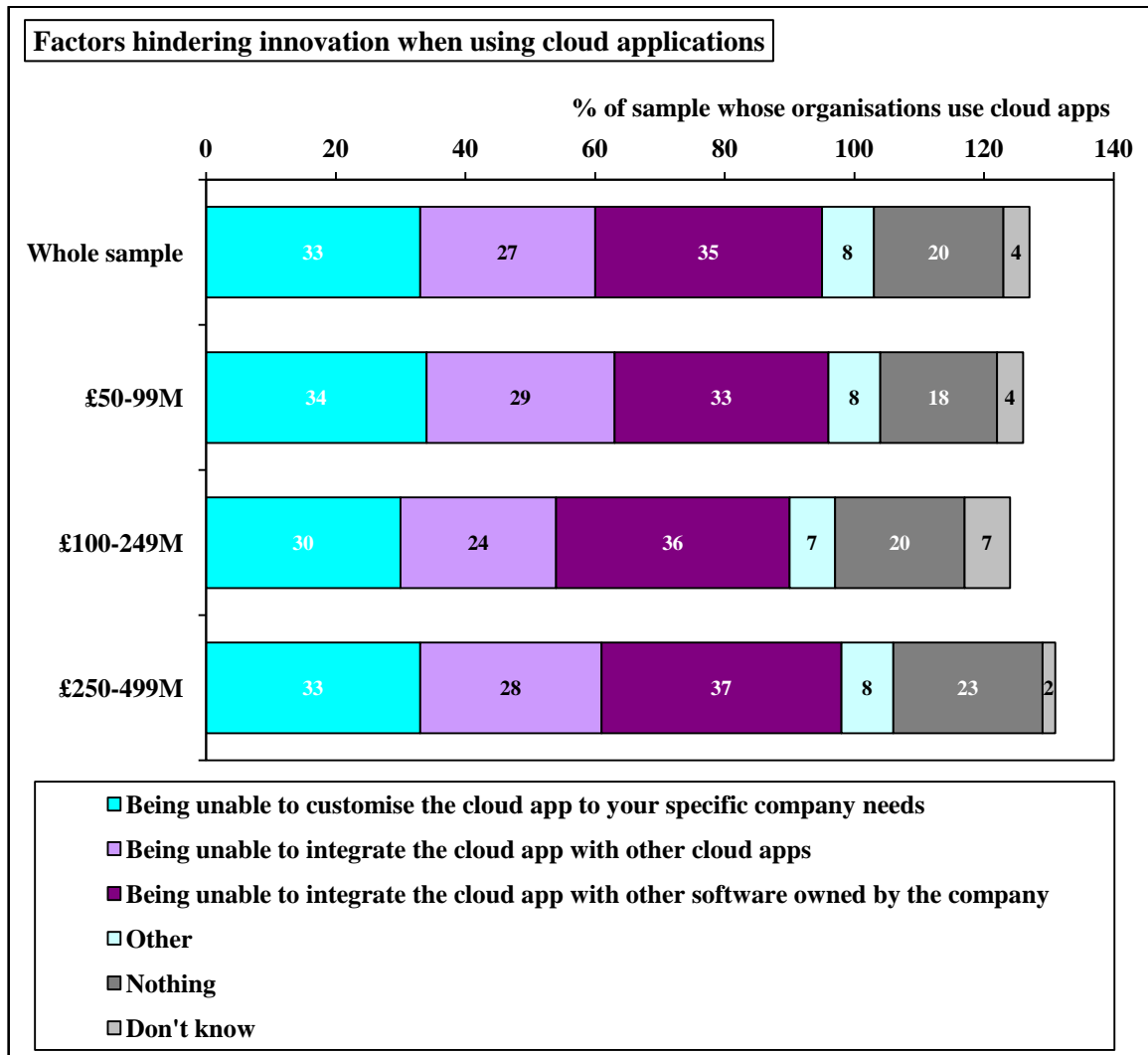
- In contrast, 37% are definite that this has not happened, whereas another 21% admit they do not know if it happened or not.
- Among those who cited a figure, the average number of individual security breaches per department is 5 in a 12-month period, whereas the median is 2.
- Statistically, there is no difference according to company size and the proportion of those who have experienced a data security breach in their department associated directly with the use of cloud applications.
- Similarly, statistically, there is no difference according to company size and the number of data security breaches in the last 12 months.

3.11. [Just to those whose departments use cloud apps] To what degree does having cloud data handled externally by one or more cloud vendors make it hard for your department to be compliant?



- Collectively, among those whose departments use cloud applications, 72% say having cloud data handled externally by one or more cloud vendors makes it hard for their department to be compliant.
- In more detail, 6% say it makes it extremely hard, while 29% say it makes it moderately hard and 37% say it makes it slightly harder.
- In contrast, 25% say it does not make it any harder, while another 3% are unsure on this issue.
- Across the size bands, more of those with revenues of £100-249M (9%) and £250-499M (8%) say having cloud data handled externally by one or more cloud vendors makes it extremely hard for their department to be compliant, compared to those with revenues of £50-99M (3%).

3.12. [Just to those whose organisations use cloud apps] Which of the following, if any, have hindered your company's ability to innovate using its cloud applications?

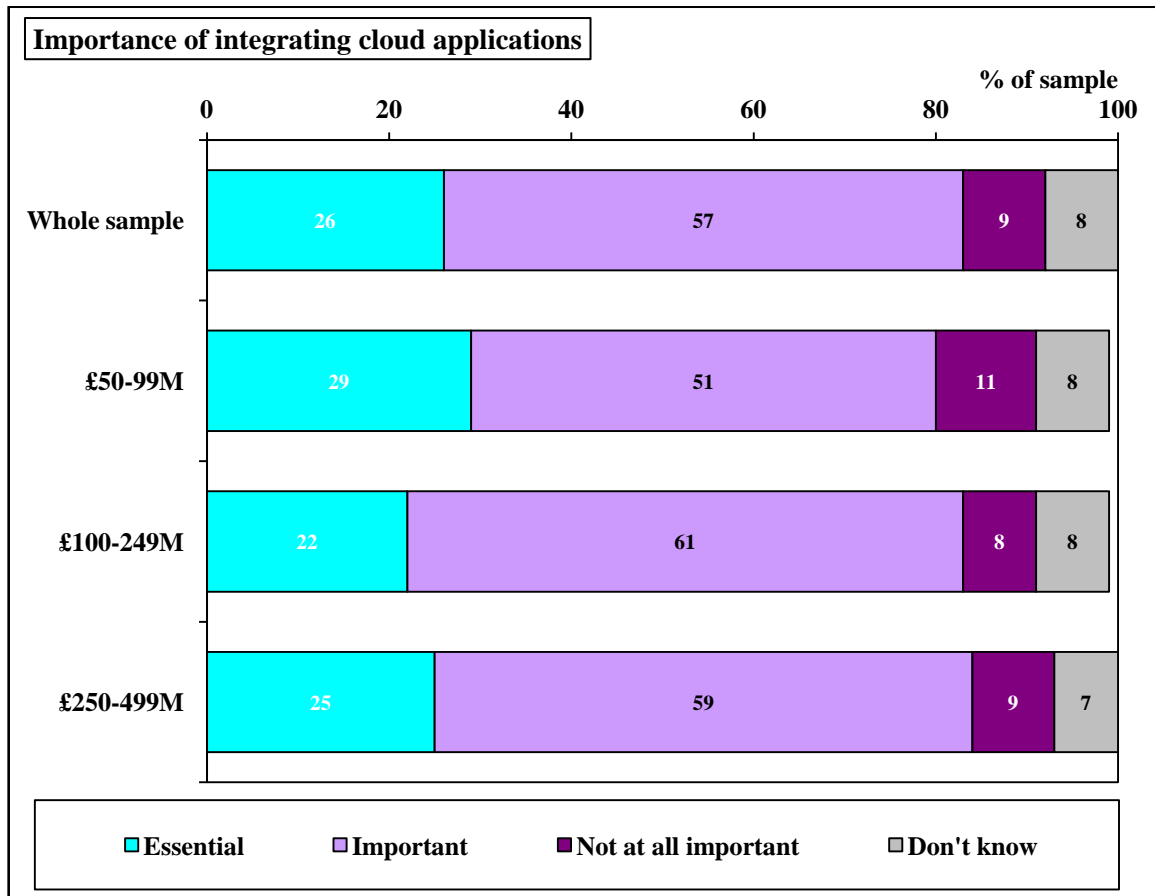


- Collectively, 76% of companies that use cloud applications say their ability to innovate using their cloud applications has been hindered in some way.
- The main issue is that of being unable to integrate the cloud app with other software owned by the company (35%).
- Similarly, 27% say being unable to integrate the cloud app with other cloud apps has hindered their ability to innovate using the cloud.
- Together, this means 54% have been hindered by integration issues [not shown].
- In addition, 33% say being unable to customise the cloud app to their specific company needs has hindered their ability to innovate.
- 8% think other issues apply.
- In contrast, just 20% do not think their ability to innovate using their cloud applications has been hindered in any way.

Cloud hindering innovation

- Another 4% are unsure on this issue.
- Statistically, there is no difference according to company size and how their use of cloud applications has been hindered.
- However, more of those with revenues of £250-499M (26%) say two or more of these issues have affected their ability to innovate using the cloud, compared to those with revenues of £50-99M (18%) [not shown].

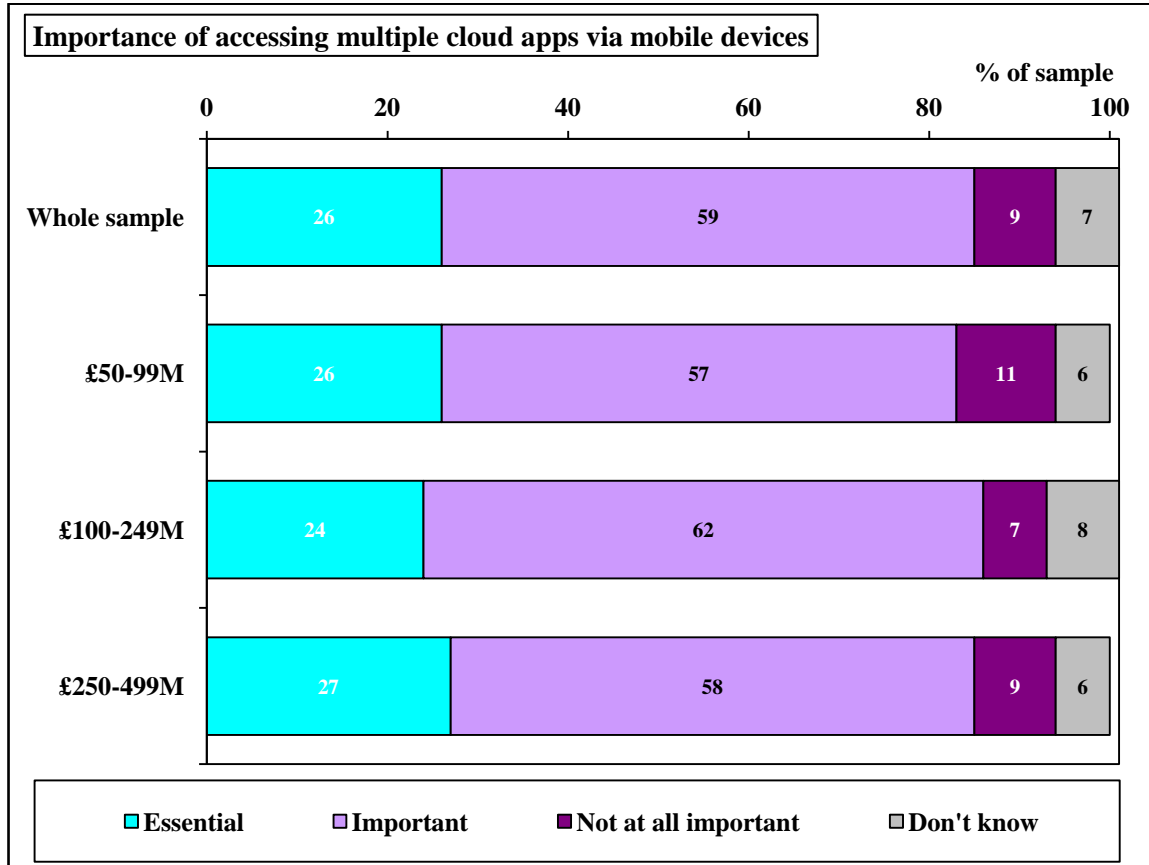
3.13. How important do you think it is that cloud applications are fully integrated with each other and with other software in the organisation to be able to reap the full benefits of cloud computing?



- Collectively, 83% of all respondents think it is important to some degree that cloud applications are fully integrated with each other and with other software in the organisation to be able to reap the full benefits of cloud computing.
- In more detail, 26% describe this as essential, while 57% describe it as important.
- In contrast, 9% do not think it is important.
- Quite a high proportion of these business managers do not know how important this issue is (8%).
- Across the size bands, more of those with revenues of £50-99M (29%) describe it as essential that cloud applications are fully integrated to reap the full benefits of cloud computing, compared to those with revenues of £100-249M (22%).

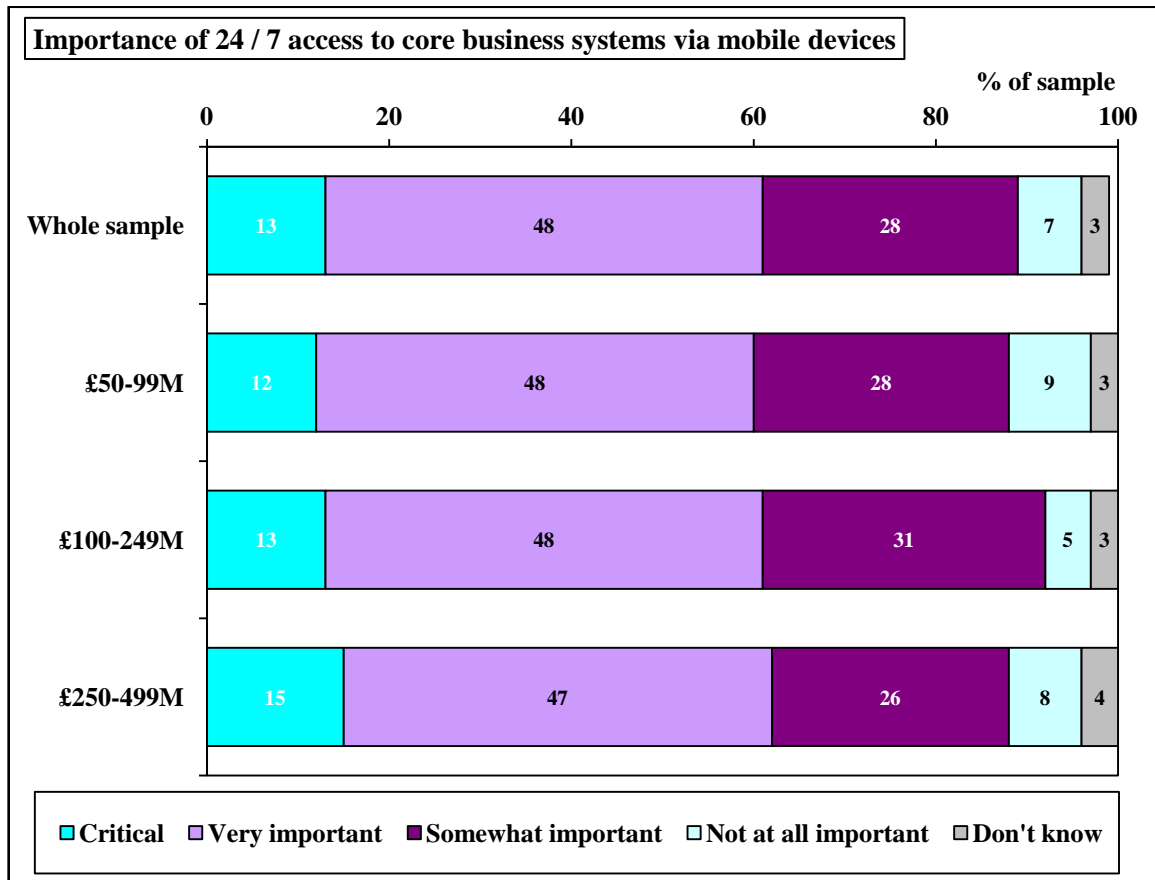
Importance of mobile cloud integration

3.14. How important do you think it is for senior decision makers in your company to be able to access multiple business cloud apps on their mobile devices simultaneously where the apps can talk to each other and integrate business data and information from app to app?



- Collectively, 84% of respondents think it is important to some degree to be able to access multiple business cloud apps on their mobile devices simultaneously where the apps can talk to each other and integrate business data and information from app to app.
- In more detail, 26% think this is essential, while another 59% describe it as important.
- In contrast, 9% do not think this is important, and another 7% are unsure on the issue.
- Statistically, there is no difference according to company size and how important respondents think it is to be able to access multiple business cloud apps simultaneously on their mobile devices.

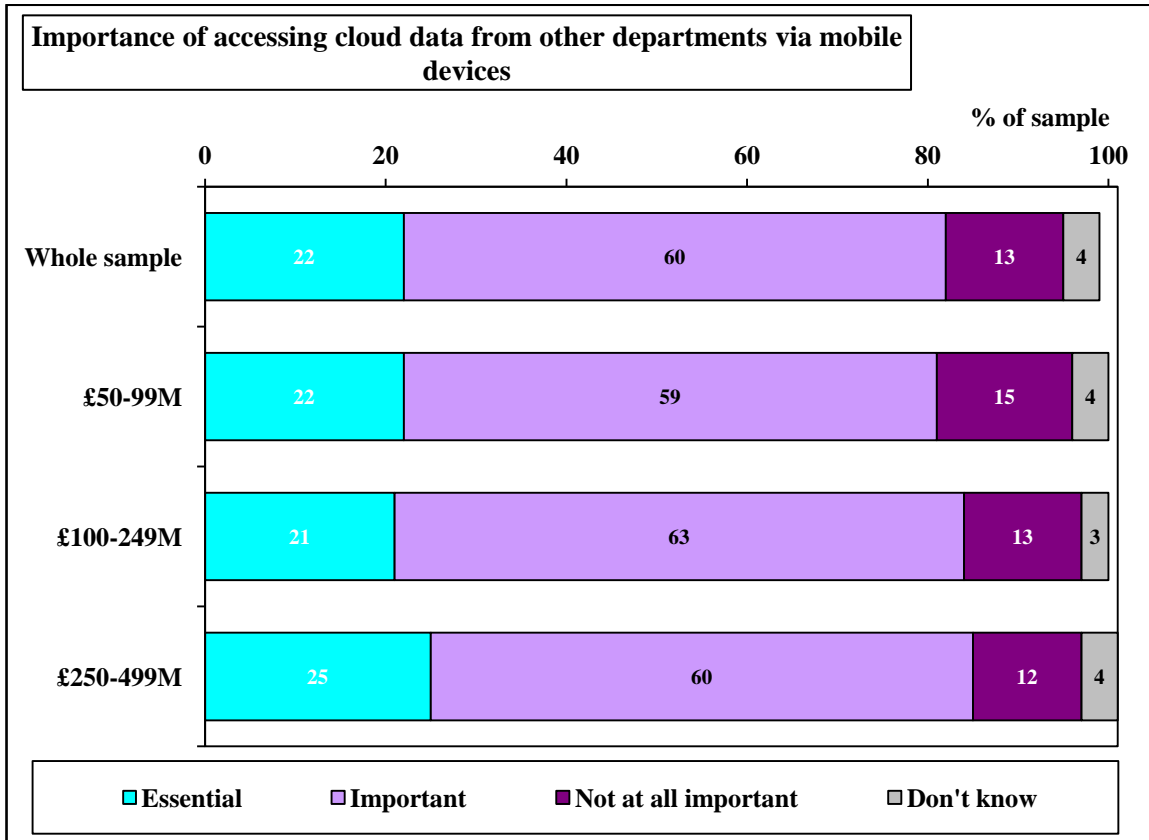
3.15. How important is it to your overall business strategy to be able to provide 24 / 7 access to core business systems to employees via their mobile devices?



- Collectively, 90% of respondents think it is important to some degree to their overall business strategy to be able to provide 24 / 7 access to core business systems to employees via their mobile devices.
- In more detail, 13% go as far as saying this is critical, while 48% describe it as very important, and another 28% describe it as somewhat important.
- In contrast, 7% do not think this is important, and another 3% are unsure on the issue.
- Statistically, there is no difference according to company size and how important respondents think being able to provide 24 / 7 access to core business systems via mobile devices is to their overall business strategy.

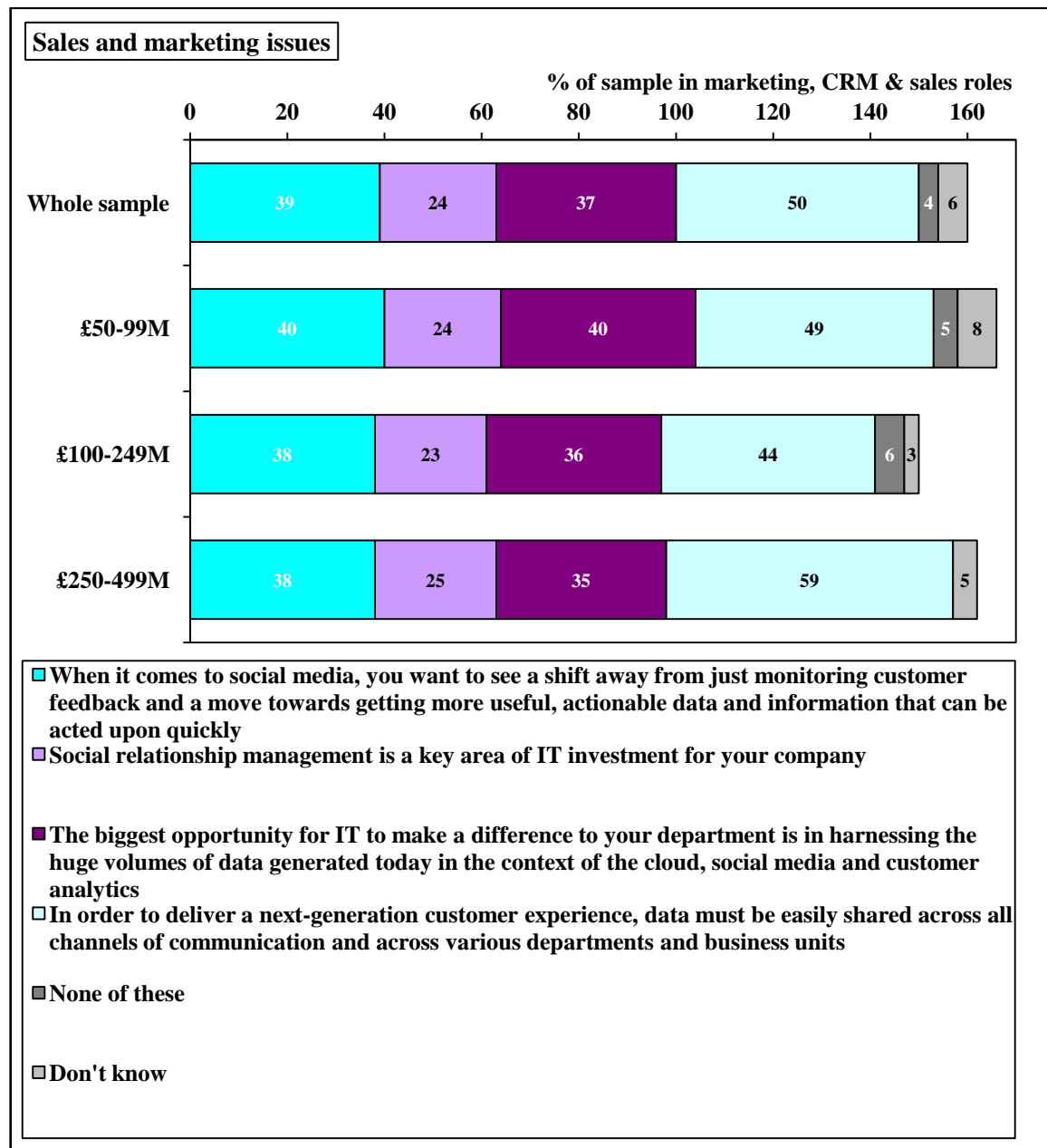
Importance of personal mobile cloud access

3.16. For you personally, how important is it or would it be to be able to access on your mobile devices cloud app data created by other departments?



- Collectively, 83% of respondents think it is important to some degree to them personally to be able to access on their mobile devices cloud app data created by other departments.
- In more detail, 22% go as far as saying this is essential, while 60% describe it as important.
- In contrast, 13% do not think this is important for them personally, and another 4% are unsure on the issue.
- Statistically, there is no difference according to company size and how important it is for them personally to be able to access on their mobile devices cloud app data created by other departments.

3.17. [Just to those in marketing, CRM & sales roles] Which of the following statements do you agree with?

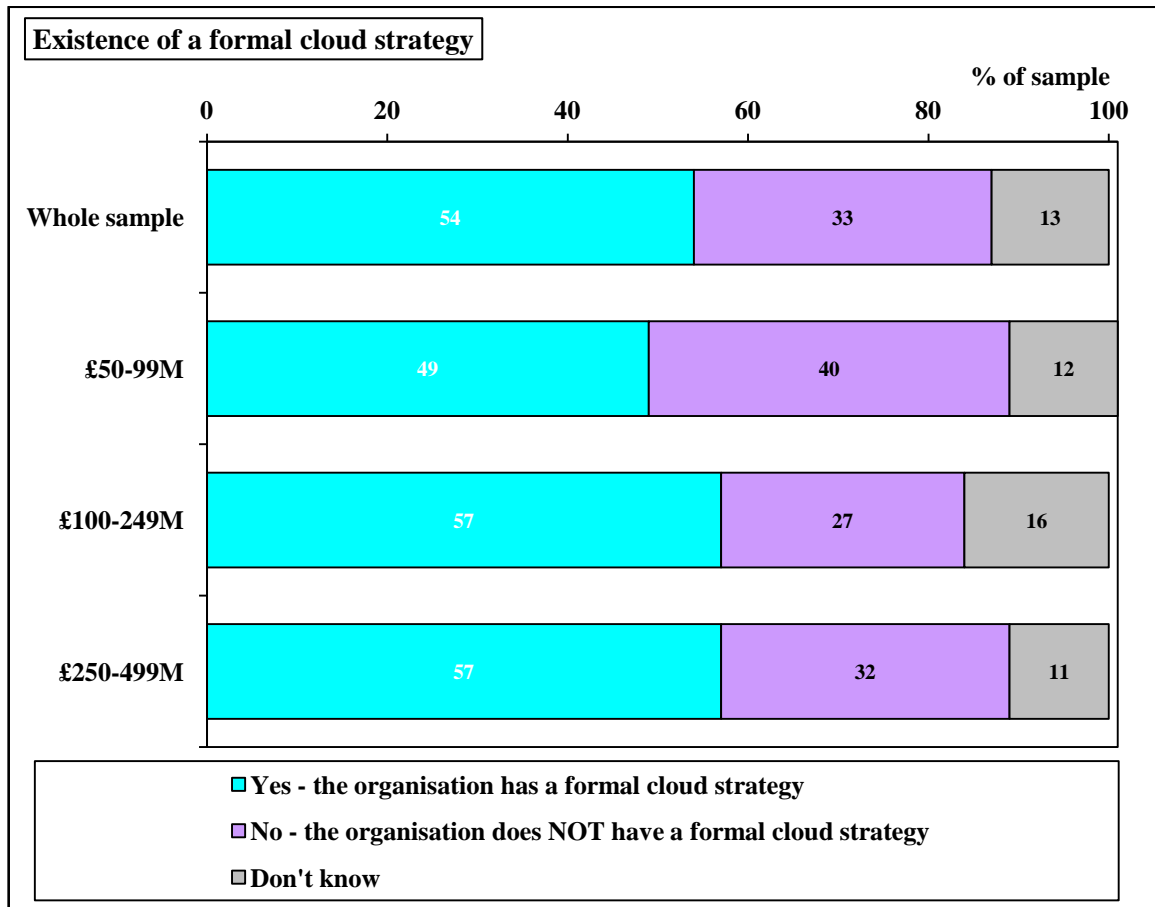


- Among those in sales, marketing & customer services / CRM roles, 50% think, in order to deliver a next-generation customer experience, data must be easily shared across all channels of communication and across various departments and business units.
- Also, 39% think when it comes to social media, they want to see a shift away from just monitoring customer feedback and a move towards getting more useful, actionable data and information that can be acted upon quickly.
- 37% agree that the biggest opportunity for IT to make a difference to their department is in harnessing the huge volumes of data generated today in the context of the cloud, social media and customer analytics.

Sales & marketing issues

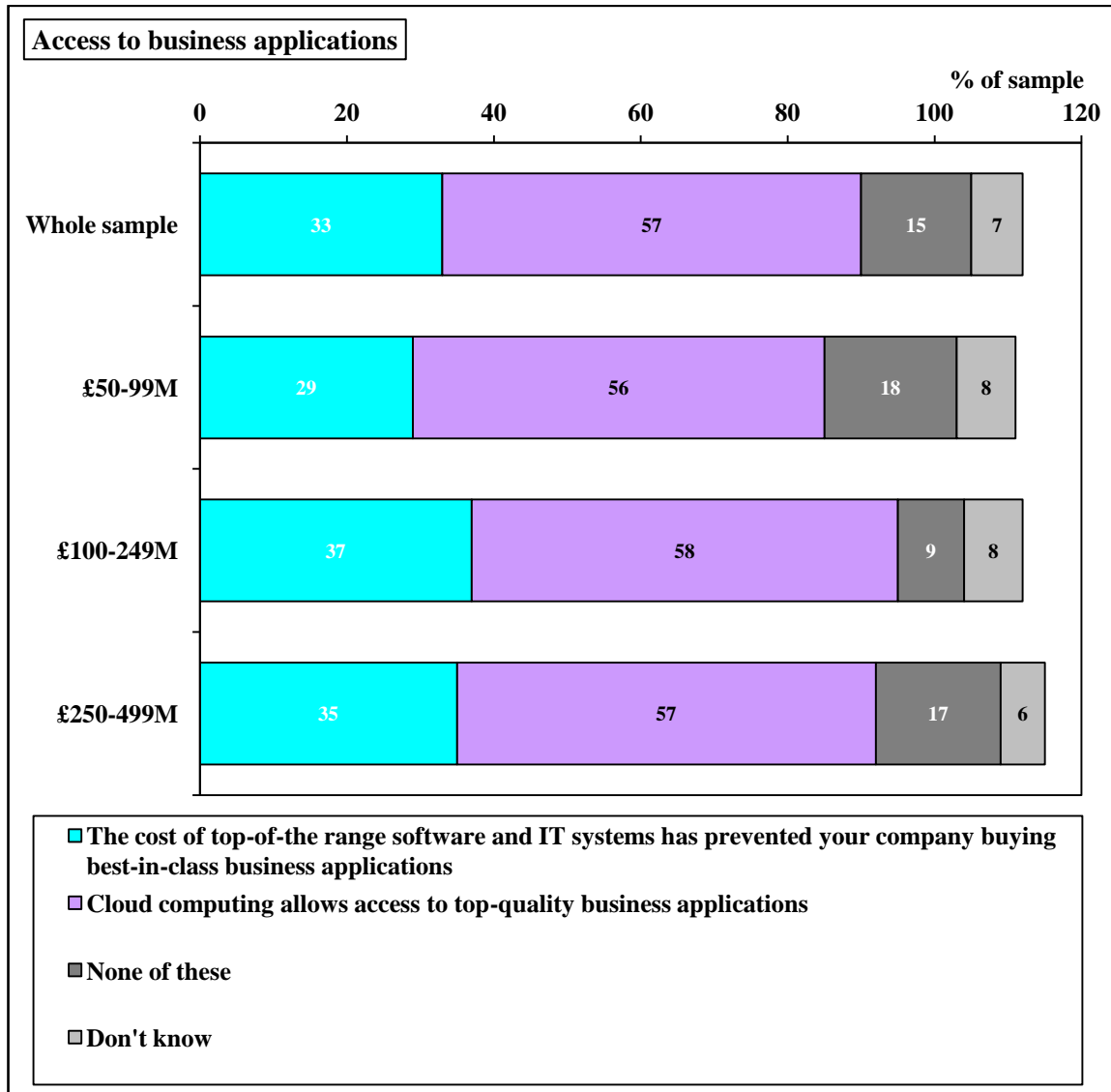
- Finally, 1 in 4 (24%) thinks social relationship management is a key area of IT investment for their company.
- Only 4% do not agree with any of these statements, while another 6% are unsure on these issues.
- Statistically, there is no difference according to company size and which of these statements respondents agree with.

3.18. Does your organisation have an overall cloud strategy aligned with the strategic direction of the business that has been discussed and approved at CEO / Board level?



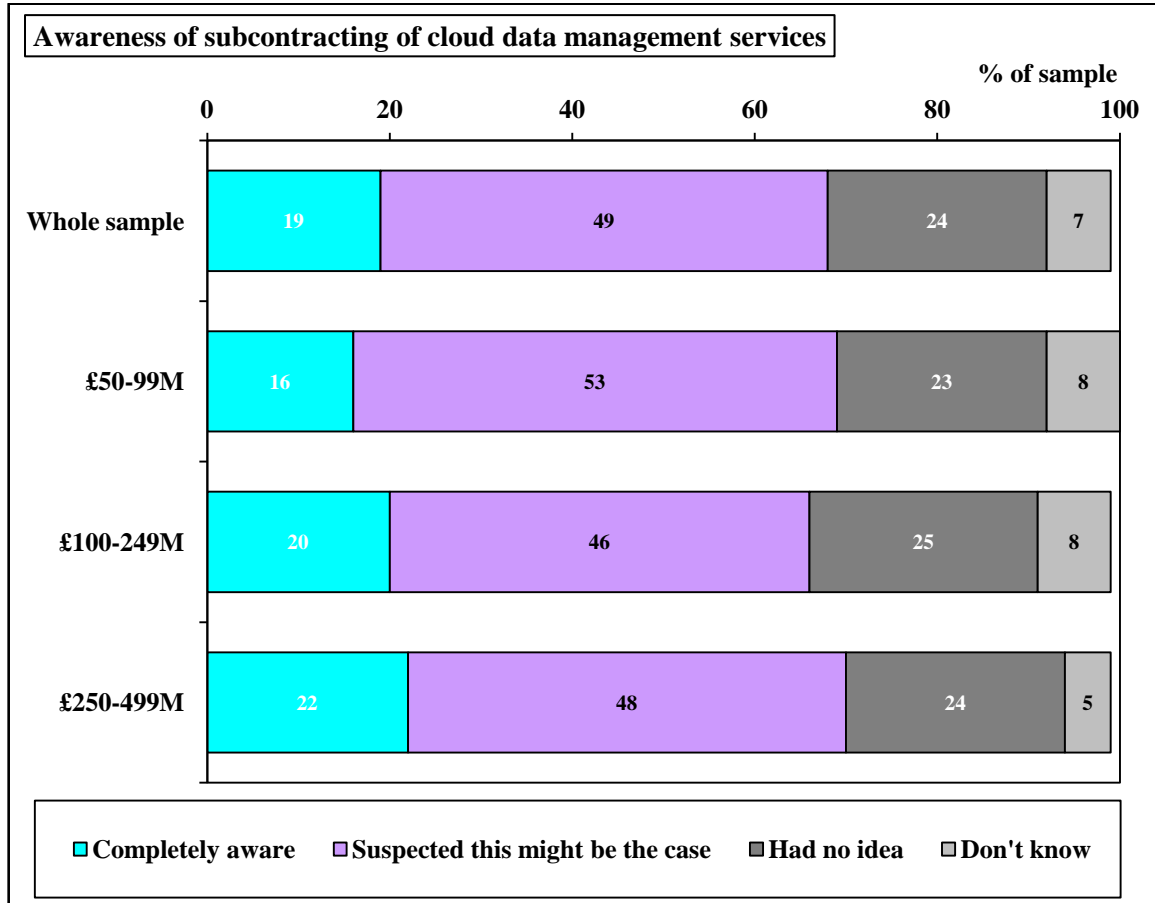
- 54% of organisations have an overall cloud strategy aligned with the strategic direction of the business that has been discussed and approved at CEO / Board level.
- In contrast, 33% are definite that they do not.
- Another 13% are unsure on this issue.
- Across the size bands, more of those with revenues of £100-249M and £250-499M (both 57%) say their organisations have such a formal cloud strategy, compared to those with revenues of £50-99M (49%).

3.19. Which of the following do you agree with?



- On the one hand, 33% of respondents agree that the cost of top-of-the range software and IT systems has prevented their company buying best-in-class business applications.
- However, 57% of respondents agree that cloud computing allows access to top-quality business applications.
- Just 15% do not agree with either of these statements and another 7% are unsure on the issue.
- Across the size bands, more of those with revenues of £100-249M (37%) agree that the cost of top-of-the range software and IT systems has prevented their company buying best-in-class business applications, compared to those with revenues of £50-99M (29%).

3.20. To what degree are you aware that many niche cloud application vendors contract out to other cloud vendors data management services, meaning your data is not looked after by the cloud vendor you have a contract with?



- Collectively, 81% of respondents were not completely aware that many niche cloud application vendors contract out to other cloud vendors data management services, meaning their company data is not looked after by the cloud vendor they might have a contract with.
- In detail, 24% had no idea this might be the case, while 49% only suspected this might be the case.
- Just 19% were completely aware of this fact.
- Another 7% are unsure on this issue.
- Statistically, there is no difference in opinion on this issue according to company size.

Appendix A: Quantitative Questionnaire

Qualifying questions

- A. At which of the following levels of seniority do you operate? [Select only 1]**
- C-level / vice president level or above
 - Director level
 - Senior manager level
 - Less senior than this [Terminate]
- B. Which one of the following areas of the business do you work within? [Sequentially rotate (a-j); Select only 1]**
- MD, CEO, owner
 - Research & development (R&D)
 - Sales / commerce / e-commerce
 - Marketing, PR or communications
 - Customer services, CRM
 - Finance
 - Human resources
 - Supply chain management
 - Risk / compliance
 - Production / operations / logistics
 - IT [Terminate]
 - Don't know [Terminate]
- C. What is the approximate annual turnover / revenue for your whole organisation, including all branches, offices and sites? [Convert to local currencies during translations and back during DP: Select only 1]**
- <£50 million [Terminate]
 - £50-£99 million
 - £100-£249 million
 - £250-£499 million
 - £500 million -£1 billion [Data excluded from this report]
 - Over £1 billion [Data excluded from this report]
 - Don't know [Terminate]
 - Refused [Terminate]

Main questions

[Compulsory definition] In this research, we will refer to cloud computing; this is where computer software or applications are owned and run by a third-party company and your company pays to use the software, rather than owns it.

[CLOUD ADOPTION QUESTION]

- 1. Which of the following applies to your organisation? [Select only 1]**
- Your department and other departments use cloud applications
 - Other departments use cloud apps, but not your department
 - Your department uses cloud apps, but not other departments
 - None of the departments use cloud apps [Go to qu 13]
 - Don't know [Go to qu 13]
- 2. [Just to those whose departments use cloud apps (a & c from qu 1)] Which of the following account for why your department decided to use cloud applications? [Sequentially rotate (a-e); Select all that apply]**
- It felt the existing software and systems in place were not entirely appropriate to your department's needs
 - It felt the IT department was not helping to move your area of the business forward
 - It saw cloud computing as a shortcut to getting what the department needs

Appendix A

- d) It was seen as a way of avoiding the queue for the IT department's time
 - e) It was seen as a way of jumping the queue of IT projects the IT department has lined up
 - f) None of these
 - g) Don't know
3. **[Just to those with other departments using cloud apps (a & b from qu 1)] When you receive data / information that originates from cloud applications used by other departments, how is it given to you? [Sequentially rotate (a-g); Select all that apply]**
- a) In hard copy / paper form
 - b) Digitally in an Excel spreadsheet
 - c) Digitally in a Word document
 - d) Digitally in a PowerPoint presentation
 - e) Verbally in meetings / on the phone
 - f) In the body text of an email
 - g) **The cloud data in other departments can be accessed directly from within the business applications used by your department**
 - h) Don't know
 - i) NA - other departments do not give you data and information from cloud apps
4. **[Just to those whose organisation uses cloud apps (a, b & c from qu 1)] How many times in the last 6 months has a lack of cloud data being shared effectively across the company led to project deadlines being missed? [Record an numeric answer]**
- a) Number of times _____ [Allow 1+]
 - b) Don't know but this has happened
 - c) Don't know if this has happened
 - d) None
5. **[Just to those whose organisation uses cloud apps (a, b & c from qu 1)] How many times in the last 6 months has your department experienced downtime where people were unable to perform their job properly due to problems associated with cloud applications not being integrated [Same hover over] properly across the company? [Record an numeric answer]**
- a) Number of times _____ [Allow 1+]
 - b) Don't know but this has happened
 - c) Don't know if this has happened
 - d) None
6. **[Just to those whose organisation uses cloud apps (a, b & c from qu 1)] How many times in the last 3 years has your organisation abandoned the use of a particular cloud application due to it not being integrated [hover over on 'integrated' - By integrated, we mean the different software systems are linked and data and information can be accessed and exchanged automatically] properly across the company? [Record an numeric answer]**
- a) Number of times _____ [Allow 1+]
 - b) Don't know but this has happened
 - c) Don't know if this has happened
 - d) None
7. **[Just to those whose organisation uses cloud apps (a, b & c from qu 1)] If your organisation has attempted to integrate any cloud apps it uses with each other and / or with other software and systems in the company, roughly how much has this cost the organisation to date to perform this task? [Record an answer in [local currency]]**
- a) Cost _____ [Allow 1+] [Ask next]
 - b) Don't know the amount [Ask next]
 - c) Don't know if this has been attempted [Skip 8]
 - d) NA - it has not been attempted [Skip 8]
8. **[Just to those whose organisations use cloud apps (a, b & c from qu 1) and have attempted integration] Which of the following apply to the integration attempts? [Sequentially rotate (a-e); Select all that apply]**
- a) They were not anticipated when the company first started using the cloud apps
 - b) They were only partially successful

- c) They were completely unsuccessful
 - d) They put the company off using cloud apps
 - e) They were a headache for the IT department
 - f) None of these
 - g) Don't know
- 9. [Just to those whose department uses cloud apps (a & c from qu 1)] Which of the following, if any, have prevented you from getting the best out of the cloud applications your department uses? [Sequentially rotate (a-f); Select all that apply]**
- a) Poor integration with other software
 - b) Reliance on the IT department for help with the apps
 - c) The apps do not have the functionality you were expecting
 - d) The apps are not usable on mobile devices
 - e) The staff in your department do not find them easy to use
 - f) The staff in your department do not have the right skills to get the best out of them
 - g) Other
 - h) Nothing
 - i) Don't know
- 10. [Just to those whose departments use cloud apps (a & c from qu 1)] In the last 12 months, how many times have you witnessed a data security breach in your department associated directly with the use of cloud applications? [Record an numeric answer]**
- a) Number of times _____ [Allow 1+]
 - b) Don't know but this has happened
 - c) Don't know if this has happened
 - d) None
- 11. [Just to those whose departments use cloud apps (a & c from qu 1)] To what degree does having cloud data handled externally by one or more cloud vendors make it hard for your department to be compliant? [Select only 1]**
- a) Extremely
 - b) Moderately
 - c) Slightly
 - d) Not at all
 - e) Don't know
- 12. [Just to those whose organisations use cloud apps (a, b & c from qu 1)] Which of the following, if any, have hindered your company's ability to innovate using its cloud applications? [Sequentially rotate (a-c); Select all that apply]**
- a) Being unable to customise the cloud app to your specific company needs
 - b) Being unable to integrate the cloud app with other cloud apps
 - c) Being unable to integrate the cloud app with other software owned by the company
 - d) Other
 - e) Nothing
 - f) Don't know
- 13. How important do you think it is that cloud applications are fully integrated with each other and with other software in the organisation to be able to reap the full benefits of cloud computing? [Select only 1]**
- a) Essential
 - b) Important
 - c) Not at all important
 - d) Don't know
- 14. How important do you think it is for senior decision makers in your company to be able to access multiple business cloud apps on their mobile devices simultaneously where the apps can talk to each other and integrate business data and information from app to app? [Select only 1]**
- a) Essential
 - b) Important
 - c) Not at all important

Appendix A

- d) Don't know
- 15. How important is it to your overall business strategy to be able to provide 24 / 7 access to core business systems to employees via their mobile devices? [Select only 1]**
- a) Critical
 - b) Very important
 - c) Somewhat important
 - d) Not at all important
 - e) Don't know
- 16. For you personally, how important is it or would it be to be able to access on your mobile devices cloud app data created by other departments? [Select only 1]**
- a) Essential
 - b) Important
 - c) Not at all important
 - d) Don't know
- 17. [Just to those in marketing, CRM & sales roles (c-e in qu B)] Which of the following statements do you agree with? [Sequentially rotate (a-d); Select all that apply]**
- a) When it comes to social media, you want to see a shift away from just monitoring customer feedback and a move towards getting more useful, actionable data and information that can be acted upon quickly
 - b) Social relationship management is a key area of IT investment for your company
 - c) The biggest opportunity for IT to make a difference to your department is in harnessing the huge volumes of data generated today in the context of the cloud, social media and customer analytics
 - d) In order to deliver a next-generation customer experience, data must be easily shared across all channels of communication and across various departments and business units
 - e) None of these
 - f) Don't know
- 18. Does your organisation have an overall cloud strategy aligned with the strategic direction of the business that has been discussed and approved at CEO / Board level? [Select only 1]**
- a) Yes
 - b) No
 - c) Don't know
- 19. Which of the following do you agree with? [Sequentially rotate (a-b); Select all that apply]**
- a) The cost of top-of-the range software and IT systems has prevented your company buying best-in-class business applications
 - b) Cloud computing allows access to top-quality business applications
 - c) None of these
 - d) Don't know
- 20. To what degree are you aware that many niche cloud application vendors contract out to other cloud vendors data management services, meaning your data is not looked after by the cloud vendor you have a contract with? [Select only 1]**
- a) Completely aware
 - b) Suspected this might be the case
 - c) Had no idea
 - d) Don't know

Demographic questions

- i. As part of your job, which of the following do you deal with on a regular basis? [Select all that apply]**
- a) Suppliers
 - b) Customers
 - c) Neither

- ii. In which one of the following broad industry sectors does your organisation mainly operate? [Select only 1]**
- a) Manufacturing & engineering (including construction, agriculture, aerospace and defence, and automotive)
 - b) Transport & travel
 - c) Retail
 - d) Financial services (including insurance)
 - e) Other services (including professional services)
 - f) Utilities
 - g) Natural resources, oil & gas
 - h) Healthcare, pharmaceutical, medical and medical devices
 - i) Telecoms, high tech & communications
 - j) Public sector & not-for-profit organisations
 - k) Other (Specify _____)
 - l) Don't know
- iii. For your company, which of the following have an international element where they are located in countries other than your own? [Sequentially rotate (a-b); Select all that apply]**
- a) Customers
 - b) Other offices / sites belonging to your company
 - c) None of these
 - d) Don't know
- iv. In total, around the world and across all your organisation's sites and offices, approximately how many employees work for your organisation? [Select only 1]**
- a) 1-249
 - b) 250-499
 - c) 500-999
 - d) 1,000–4,999
 - e) 5,000 +
 - f) Don't know

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