

2024

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AVANT RESEARCH & ANALYTICS: THE DISRUPTION REPORT

Each “Disruption Report” is developed by AVANT Research & Analytics with the assistance of technical teams within AVANT. These market research reports are backed by a wealth of data secured by AVANT in our normal course of business, our own primary research of end-customers, and other reputable industry sources.

Our reports focus on today’s most disruptive technologies, those where the pace of change is rapid. Companies or technologies which – only a few years ago – may have been unknown, are now highly viable solutions that resolve the business needs that led to their creation. They have disrupted the IT landscape, a market already well known for its accelerating pace of change and innovation.

Every Avant Analytics Report gives enterprise technology leaders a contemporary and relevant overview of the featured subject. We select each topic based on the potential competitive advantages companies can realize if they adopt a given solution, depending on their particular industry, market space, or company size. All currency values in this report are expressed in U.S. dollars.

AVANT enables Trusted Advisors (agents, managed service providers, consultants, and specialized channel partners) to assist with the Technology Decision-Making Process through our specialization in disruptive technologies and solutions. We accomplish this with our:



Engineering Team of consummate professionals who study the ins-and-outs of the latest IT products from the perspective of what best meets the needs of end users.



AVANT Assessment Data collected during thousands of customer assessments and decisions.



Primary Research collected by surveying customers and Trusted Advisors to inform our decision-making process.



AVANT PATHFINDER: an IT decision making tool and repository of AVANT’s market intelligence, empowering comparative searches and intelligent queries.



AVANT analysts who conduct original research and analyze data for in-depth insights focused on, about and for Trusted Advisors, end-customers, and the surrounding ecosystem.

We also collect content in conjunction with the Trusted Advisor community, through initial assessment data and various market research tools, including surveys, interviews, focus groups, and external reports.

DIGITAL TRANSFORMATION, DISRUPTION AND GROWTH IN 2024

AVANT has released two previous State of Disruption reports in 2019 and 2021, establishing a baseline for how companies are evolving their businesses with technology. The State of Disruption Report surveys over 500 Technology CIOs and decision makers and seeks to understand the current state of disruption, including the shift from legacy technologies to the latest in “as-a-service” technologies, such as on-premises Legacy PBXs to UCaaS solutions or on-premises data centers to colocation and cloud services. The pace of change in technology is the only constant, and our research shows it’s accelerating.

In 2023, the US economy’s growth rate was 2.5%, well ahead of earlier forecasts, and the run rate for the last quarter of 2023 was 3.3%. While growth has been impacted by inflation and rising interest rates, growth is expected to pick up again in 2024 as consumer and business spending resume. Meanwhile, Gartner’s January 2024 forecast suggests worldwide IT spending is expected to total \$5 trillion in 2024, an increase of 6.8% from 2023.

Against a backdrop of uncertainty, enterprise investment in IT is likely to shift to projects that can help with cost savings or revenue protection, with a backlog of delayed investments accumulating as a result. In the past, AVANT has seen a double bump with continued growth of OPEX adoption during the economic slowdown, followed by an acceleration of technology transformation as the economy improves. The research we conducted with 501 CIO and technology decision makers supports this trend.

Just as in our last State of Disruption report, AVANT has set out to provide a tool to help make these decisions based on information from technology buyers themselves.



With our 2024 report, we aim to learn:

- How is the landscape for enterprise technology changing?
- Has the rate of digital transformation changed, and what trends are occurring across different industries?
- Are there significant differences in the rate of change at large companies compared to small- and medium-sized enterprises?

501 CXOs AND TECHNOLOGY DECISION MAKERS SURVEYED

The desire to adapt is one thing — bringing people, processes, and technology together to elicit the desired outcome is another. Are investments paying dividends?

To understand how technologies are being purchased and used, AVANT commissioned a poll of 501 U.S.-based enterprise decision makers at either the C-suite or Management/VP-level in IT, security, or finance.

To qualify for the survey, respondents had to be involved in choosing or helping their organization to implement new data network, voice, or computer infrastructure technology, including buying/ selecting new tools and services. Respondents include statistically significant subsets from the following industries:



Manufacturing



High Tech



Financial Services



Construction



Healthcare/Medical/Insurance



Consulting/Business Services



Retail/E-commerce



Questions are centered around digital transformation efforts and plans for the use of various technologies. Where questions relate growth, or growing consumption of technology, the term conveys usage reported by respondents as compared to their anticipated level of usage in the in the next 12 months. Growth isn't measured specifically in a dollar amount, but does indicate shifts in investment, interest, and attention which ultimately translates into technology uptake measured in seats, bandwidth, and the like.

KEY FINDINGS

This study revealed the following key findings:



Digital Transformation

- Most companies (even government agencies) have already embarked on digital transformation journeys. The likelihood of having a defined digital transformation plan in place moves into the mid- to high 90% range for companies larger than \$100 million. However only 28% say they have completely concluded their digital transformation journey.
- Industry segments that showed increased momentum for digital transformation initiatives and aspire to be at the forefront of IT include financial services (including insurance), legal, and high-tech businesses.



UCaaS

- Adoption of UCaaS, as measured by company revenue, has occurred nearly as rapidly at small companies as large enterprises, with over 80% of companies expected to have evaluated UCaaS solutions by the end of 2024. Adoption and full migration of legacy PBXs, however, will still take some considerable time, with the current transformation to the UCaaS around 60% completed.
- User experience needs to be a top priority when selecting a UCaaS platform. When companies choose to defer moving to UCaaS, the decision is often based on the learning curve associated with using a new system.



CCaaS

- Growth in seats migrating to CCaaS in the next 12 months is expected to be strongest in financial services and retail/e-commerce, followed closely by high tech and manufacturing.
- Companies in the \$50M to \$100M revenue range are expected to grow CCaaS seats by 11% in the next 12 months.



Trusted Advisors

- In our 2024 survey, 34% of respondents felt that their internal teams are somewhat qualified to unqualified to plan, manage, optimize, and troubleshoot the full range of their IT infrastructure. Customers continue to rely on Trusted Advisors most frequently for assistance with cloud services. With multi-cloud a reality for most enterprises, Trusted Advisors are a key resource, with 78% of respondents using them for the procurement of cloud services.



Security

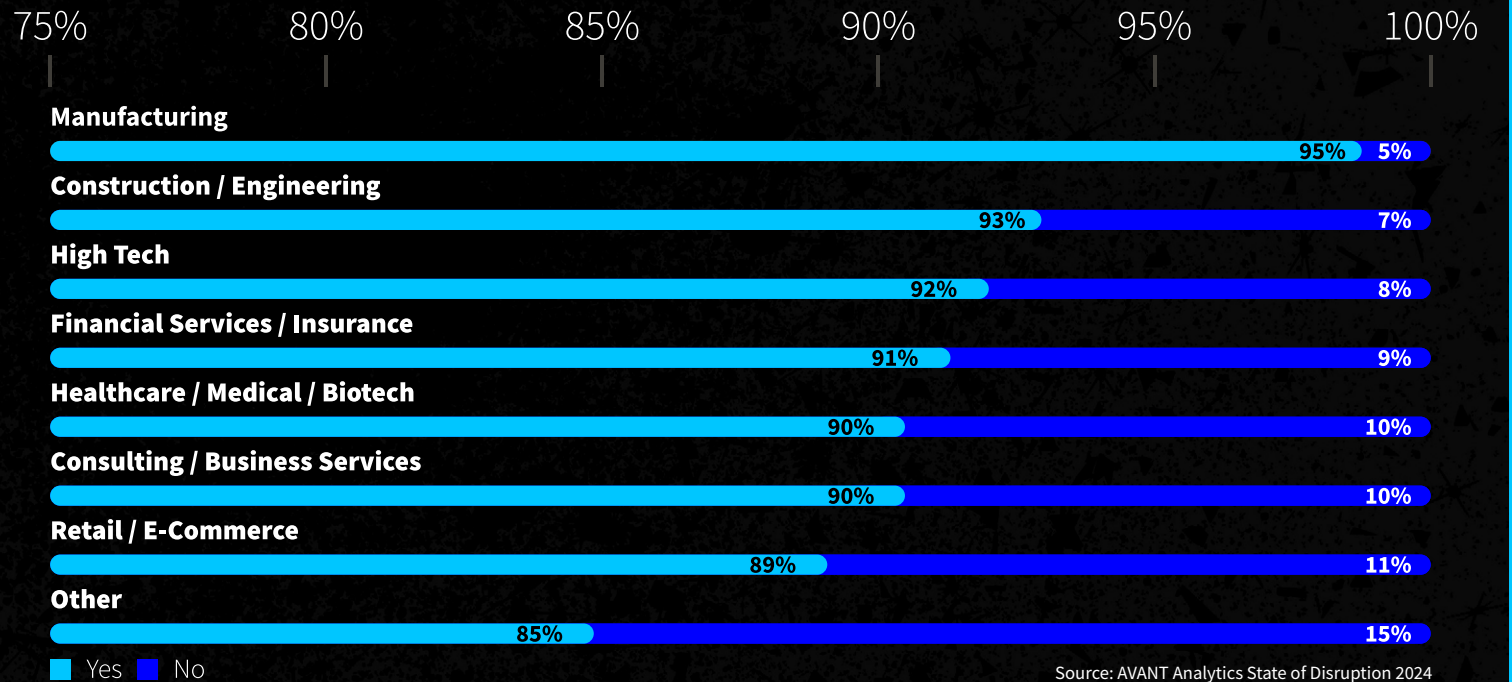
- Security solutions, including selection of managed security providers, are another area where Trusted Advisors are frequently called upon for strategic guidance.
- Only 39% of respondents felt they are well prepared for a cyber-attack; 32% of respondents already report the use of third parties in security management.
- 69% of respondents said they feared or somewhat feared that a security breach could cost them their job.



Digital Transformation

Digital transformation is the integration of technology into a business, resulting in fundamental changes in its operations and value creation for customers. This is a practice already taking place in most companies and government agencies. Few companies want to be left behind — 92% of respondents across all industries have a plan in place and have started their transformation journey.

Fig 1.1 Company plans for digital transformation, by industry

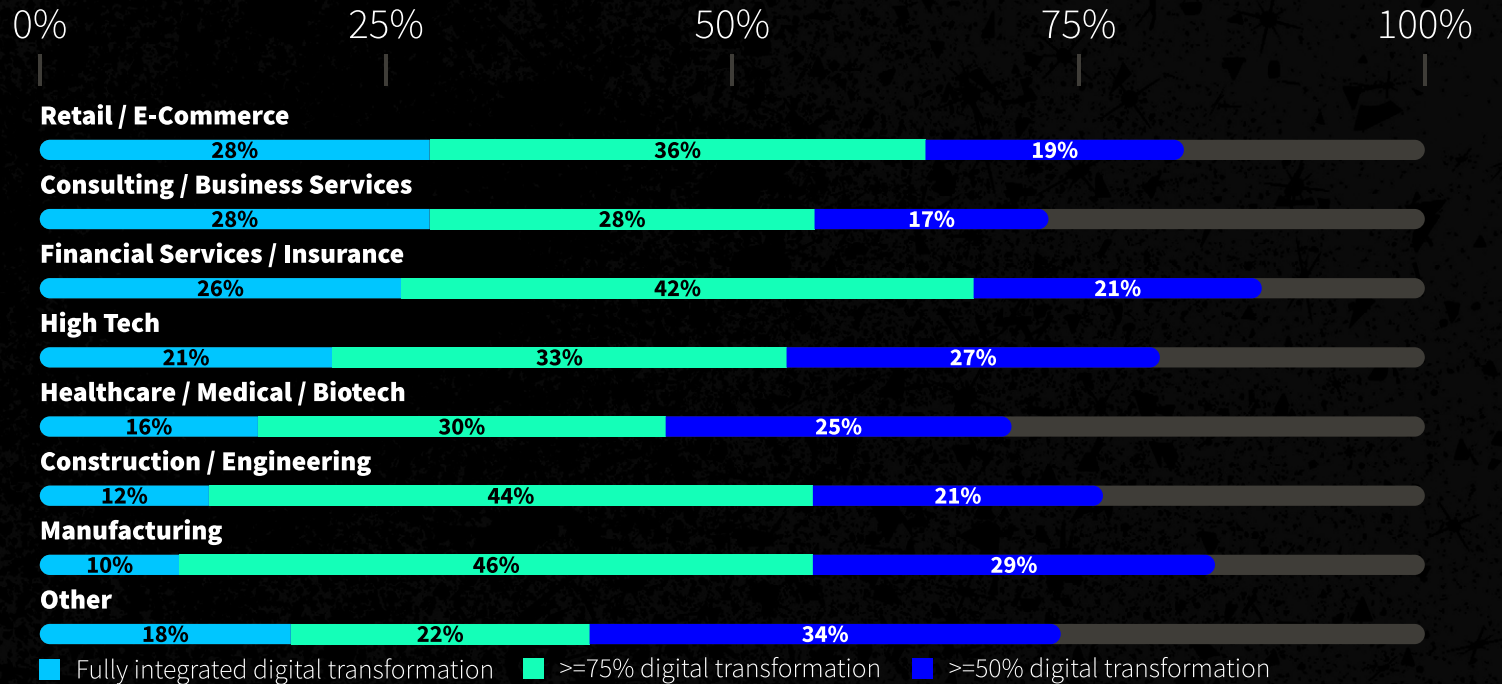


Source: AVANT Analytics State of Disruption 2024

By the same token, far fewer respondents say their companies have fully realized digital transformation plans. Retail/e-commerce and consulting/business services are furthest along, with 28% saying their companies' goals have been fully realized. Many consultants and industry experts will say that digital transformation is a journey that is never fully completed; nonetheless, completing a plan is a significant milestone.

Of the industries that are coming close to completing digital transformation plans, 46% of respondents in manufacturing say their companies have realized at least 75% of their digital transformation goals, followed by 44% in construction and engineering.

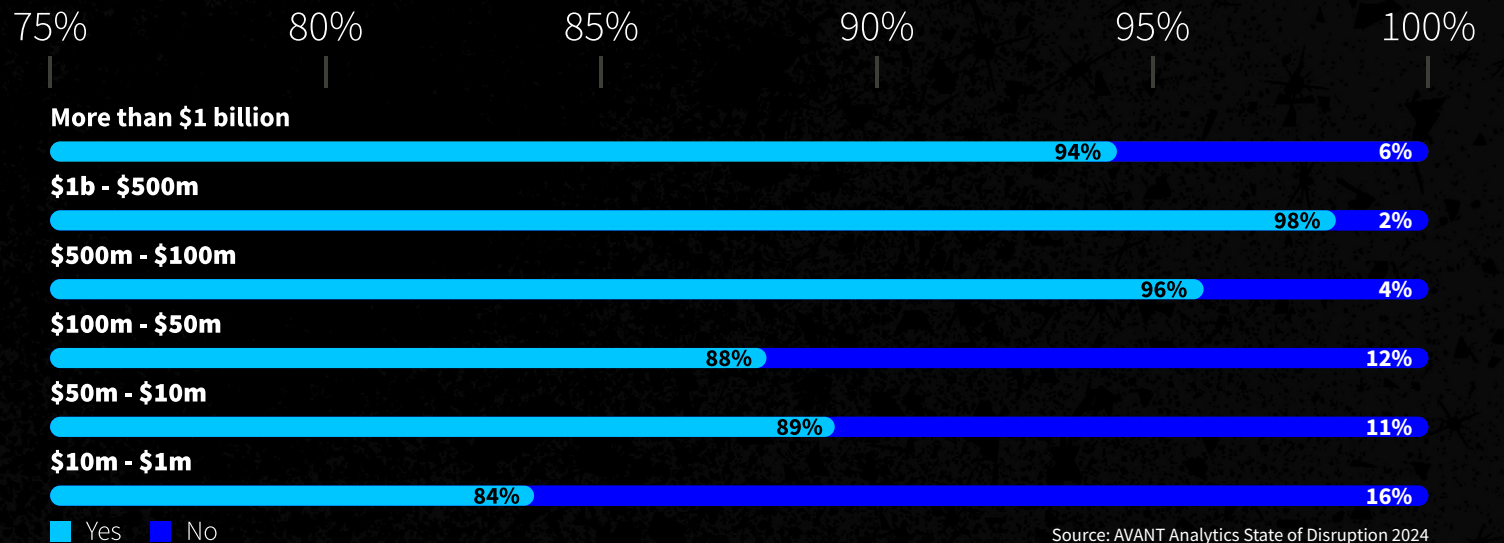
Fig 1.2 Digital transformation goals, % of plan realized



Source: AVANT Analytics State of Disruption 2024

The following figure shows the same comparison by revenue band, as opposed to vertical market. Note that the correlation between company size and the likelihood of having a defined digital transformation plan in place moves into the mid- to high- 90% range for companies larger than \$100 million, while companies under the \$100 million mark are in the 80% range.

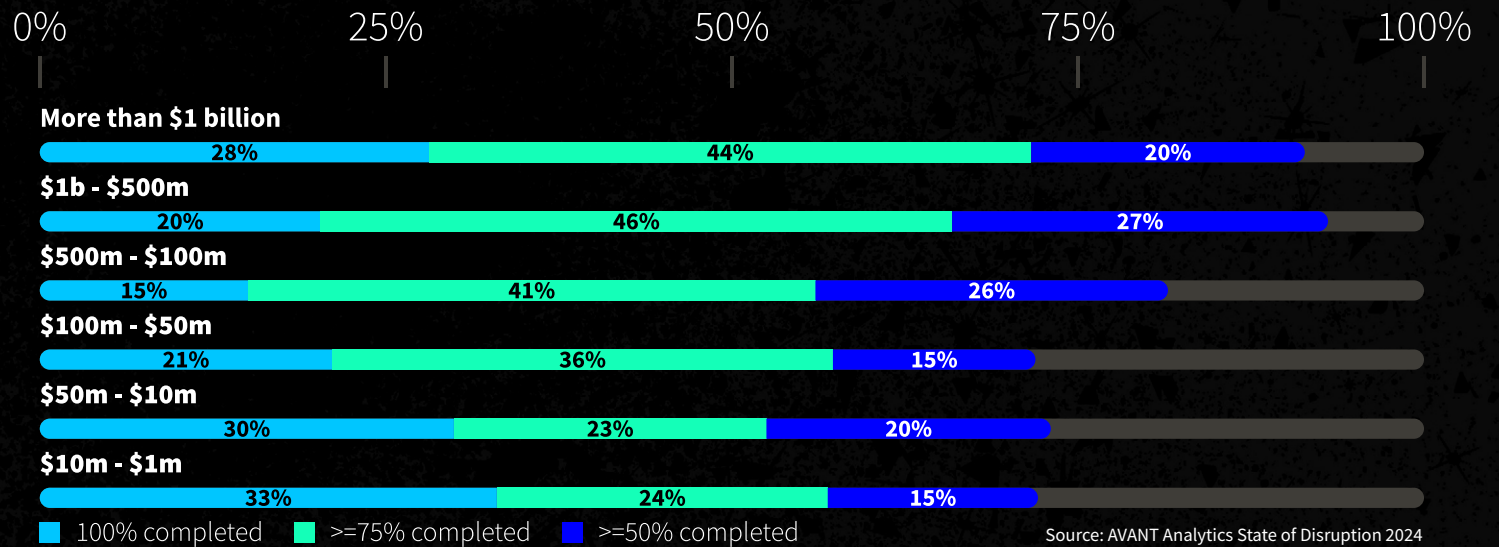
Fig. 1.3 **Digital transformation plans by revenue**



Source: AVANT Analytics State of Disruption 2024

Breaking down figures for digital transformation plans to a more granular level, we see that smaller companies (between \$1 million and \$50 million) are most likely to have set digital transformation goals and fully realized their plans. Larger companies with bigger budgets might be expected to be further along than mid-market companies, but 41% of companies in the \$100 to \$500 million annual revenue range are at least 75% along with digital transformation plans, while 36% of those in the \$50 million to \$100 million range are at the same point.

Fig 1.4 Companies that have completed 50% or more of digital transformation program





Role of the Trusted Advisor

Uncertain economic conditions. Changing workforce attitudes about work from home versus the office. Add to that the challenge of staying on top of change in the tech industry. Keeping up with digital transformation has always been hard to manage — that has become even more evident in 2024 with the explosion of interest in generative AI. Vendors are adding in ChatGPT-like functionality in an increasing number of products. It isn't easy to tell if these new features are actually useful or not. Enterprises need to ask “Do these new capabilities make sense for our business? What impact and ROI can they have? How would you handle a platform migration?”

Trusted Advisors have long played a role in mapping out strategies for using and implementing IT.

In our latest survey, 66% of respondents believe that their internal teams are highly qualified to plan, manage, optimize, and troubleshoot the full range of their IT infrastructure (Fig. 2.1). Conversely, 34% think their teams are less than highly qualified, compared to 40% in our previous survey. Trusted Advisors play a role of recommending technology solutions 84% of the time (Fig. 2.2).

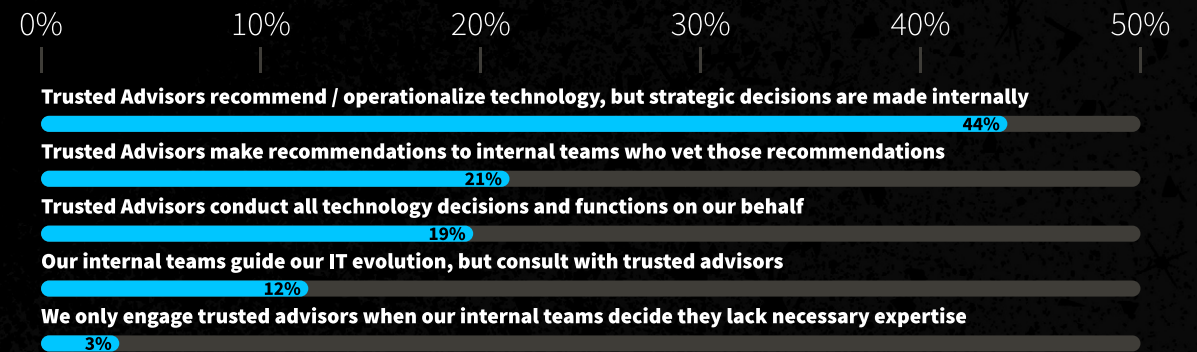
Fig 2.1 To what extent is your internal team qualified to plan, manage, optimize, and troubleshoot your entire IT infrastructure?



Source: AVANT Analytics State of Disruption 2024

The knock-on effect is a reported shift in the involvement of Trusted Advisors with IT decision makers (Fig. 2.2). Forty-four percent of survey respondents said they rely on Trusted Advisors to help recommend and operationalize technologies while strategic decisions are made internally. Interestingly, 19% of respondents said Trusted Advisors control all technology decisions and functions, up from 16% in our previous survey.

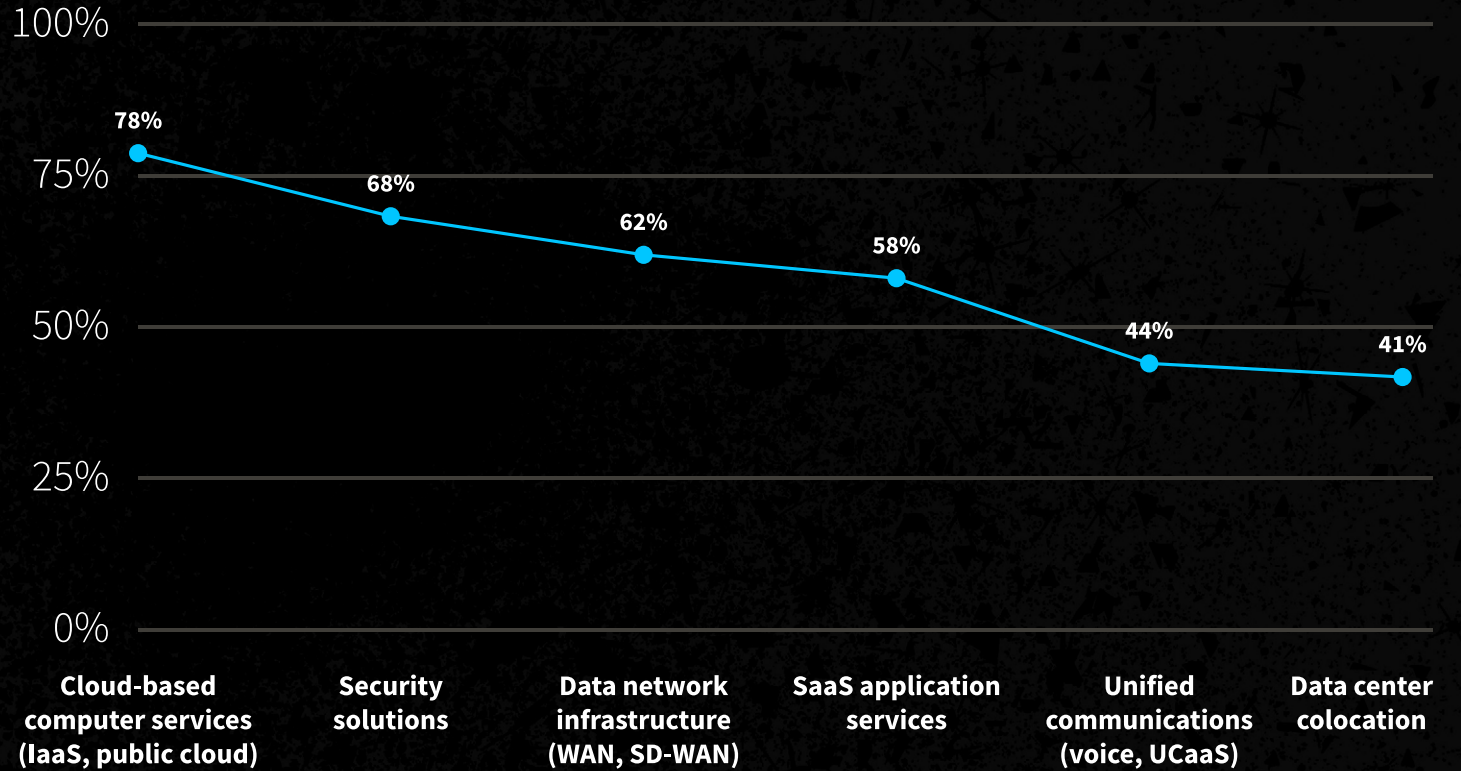
Figure 2.2 Usage: Services of Trusted Advisors



Source: AVANT Analytics State of Disruption 2024

Customers continue to rely on Trusted Advisors for assistance with cloud services. No wonder — AWS is known for its computer cloud and S3 storage services, but there are over 200 other services on offer as well. With multi-cloud and hybrid-cloud a reality for most enterprises, Trusted Advisors are a key resource with 78% of respondents using them for the procurement of cloud services. Security solutions, including selection of managed security providers, are another area where Trusted Advisors are frequently called upon for strategic guidance.

Figure 2.3 Areas of Trusted Advisor participation



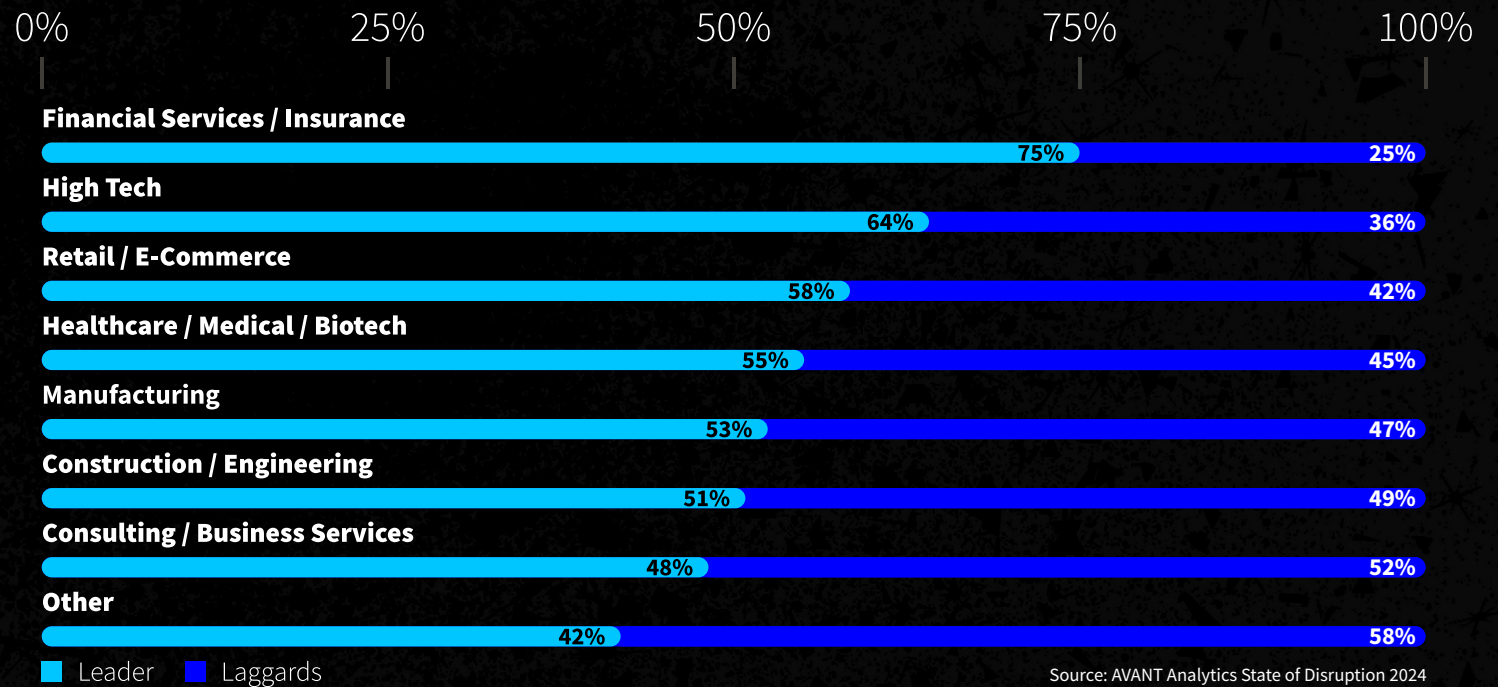
Source: AVANT Analytics State of Disruption 2024

To benchmark innovation in different market verticals, AVANT asked respondents to measure their company's appetite for technology innovation. From wanting to be at the forefront of innovation to only seeking new technology when a process is broken or too inefficient, understanding how you compare to others in your market is key to any transformation process.

In many cases, industry segments in the survey showed increased momentum for digital transformation initiatives. Financial services (including insurance) swung from 45% of respondents reporting that they “Always want to be at the forefront of IT” in our 2021 study, to 75% in this year’s survey, while 64% of legal and high-tech businesses reported the same. Amid the pandemic, retail was near the top of the 2021 survey with 56% of respondents classifying themselves as leaders. This increased to 58% in 2024, as many companies continued efforts around customer support and online or hybrid shopping experiences.

At the other end of the scale, a slowing real estate market, rising interest rates, and layoffs at tech-oriented real estate platforms like Zillow and Redfin revealed an industry less invested in transformation, with 80% falling under the “laggards” category. Of that majority, 67% are taking a more cautious approach of monitoring new tech and making decisions after seeing the experiences of other competitors; another 7% only engage new tech when the status quo has proven ineffective. Education, hospitality, food/beverage, and government (reported in the ‘other’ category) joined the energy industry at the “laggards” end of the transformation pool.

Figure 3.1 **Distribution of leaders & laggards within each industry**



Source: AVANT Analytics State of Disruption 2024



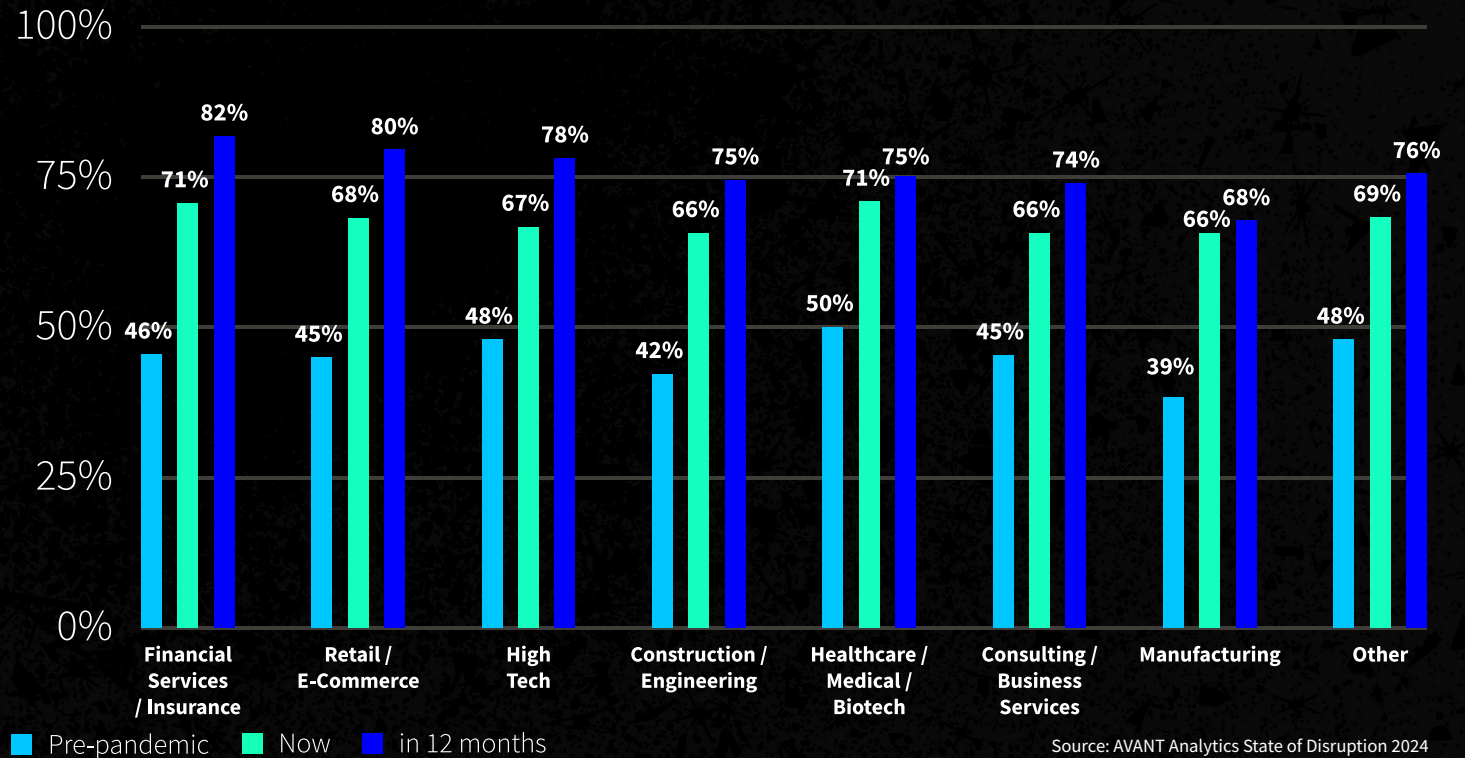
UCaaS

AVANT asked survey respondents to characterize the use of cloud-based Unified Communications as a service (UCaaS), as opposed to premises-based systems during the specified time frames: pre-pandemic, time survey was taken, and in 12 months.

The data shows that the migration from premises-based systems to UCaaS systems continues, with an average of 58% of phones across all industries surveyed being cloud-based now compared to 47% before the pandemic. That number is expected to rise to an average of 77% by Q2 2024, based on survey results. Is that expectation realistic? Reality could certainly diverge from respondents' predictions, especially if IT budgets suddenly shrink as companies evaluate plans at the end of 2023. Still, IDC's forecast for the unified communications and collaboration market is 8.2% revenue growth Year over Year to \$64.2 billion. In terms of seat and license volume, the latest figures show that the worldwide UC&C market grew 7.7% Year over Year in Q1 2023 to \$587.6 million, according to IDC.

Companies in the financial services and insurance industry — not always the fastest adopter of new technologies because of regulatory constraints — have the largest gap between pre-pandemic adoption (46%) and expected adoption in the 12 months after the survey was taken (82.4%).

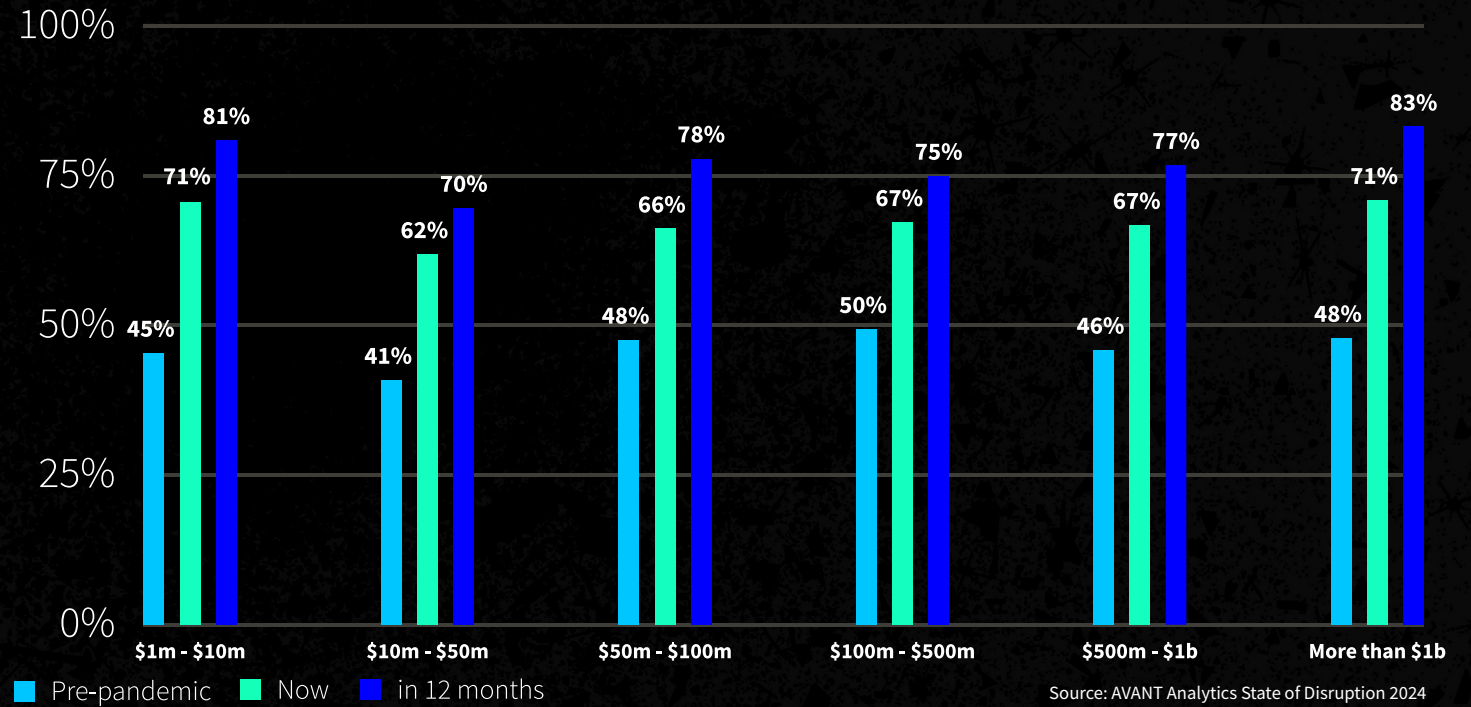
Figure 4.1 UCaaS growth (number of seats, by vertical)



Retail, high tech, and construction are also set to see adoption increase another 9% to 11% in the next 12 months.

Adoption of UCaaS, as measured by company revenue, has occurred nearly as rapidly at small companies (\$1 million to \$10 million) as large enterprises (over \$1 billion), with over 80% of phones expected to migrate to UCaaS by 2024 in both segments.

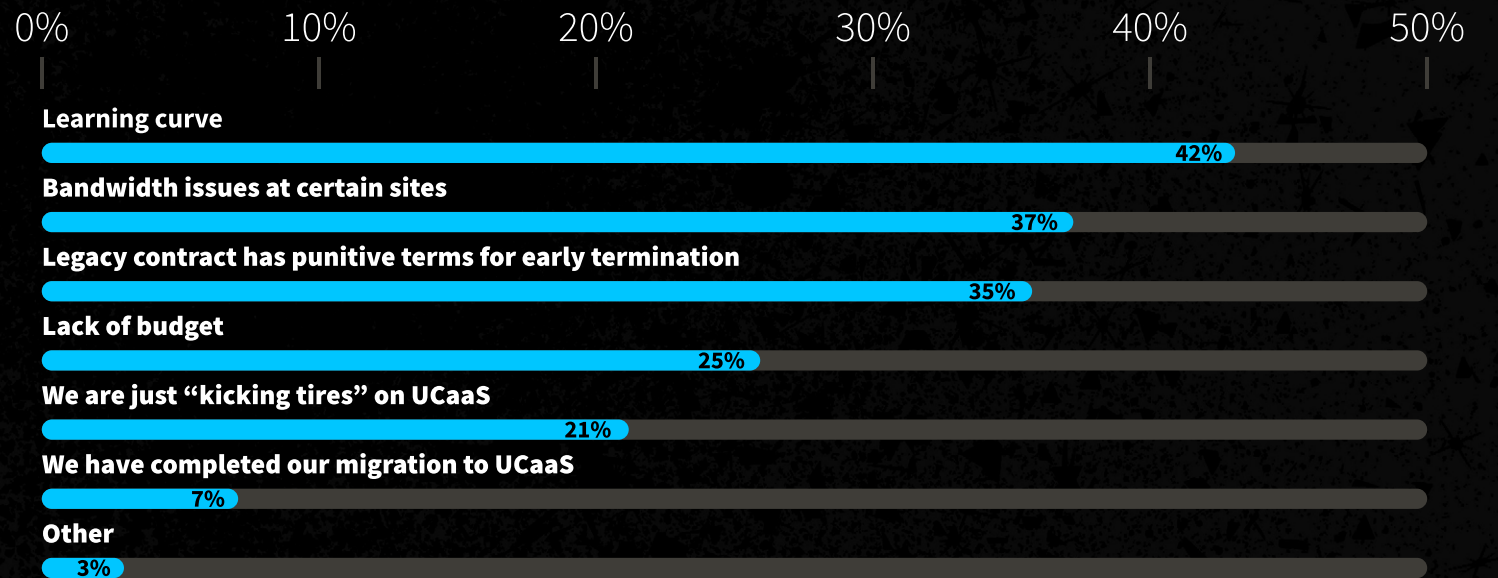
Figure 4.2 UCaaS growth by company revenue



Companies in the \$50 million to \$100 million range will be another strong segment, growing adoption of UCaaS in the next 12 months, moving from 68.8% to 78.4% of seats.

Figure 4.3 shows that when companies choose to defer moving to UCaaS, that decision is most often based on the learning curve associated with using a new system as opposed to a rejection of UCaaS.

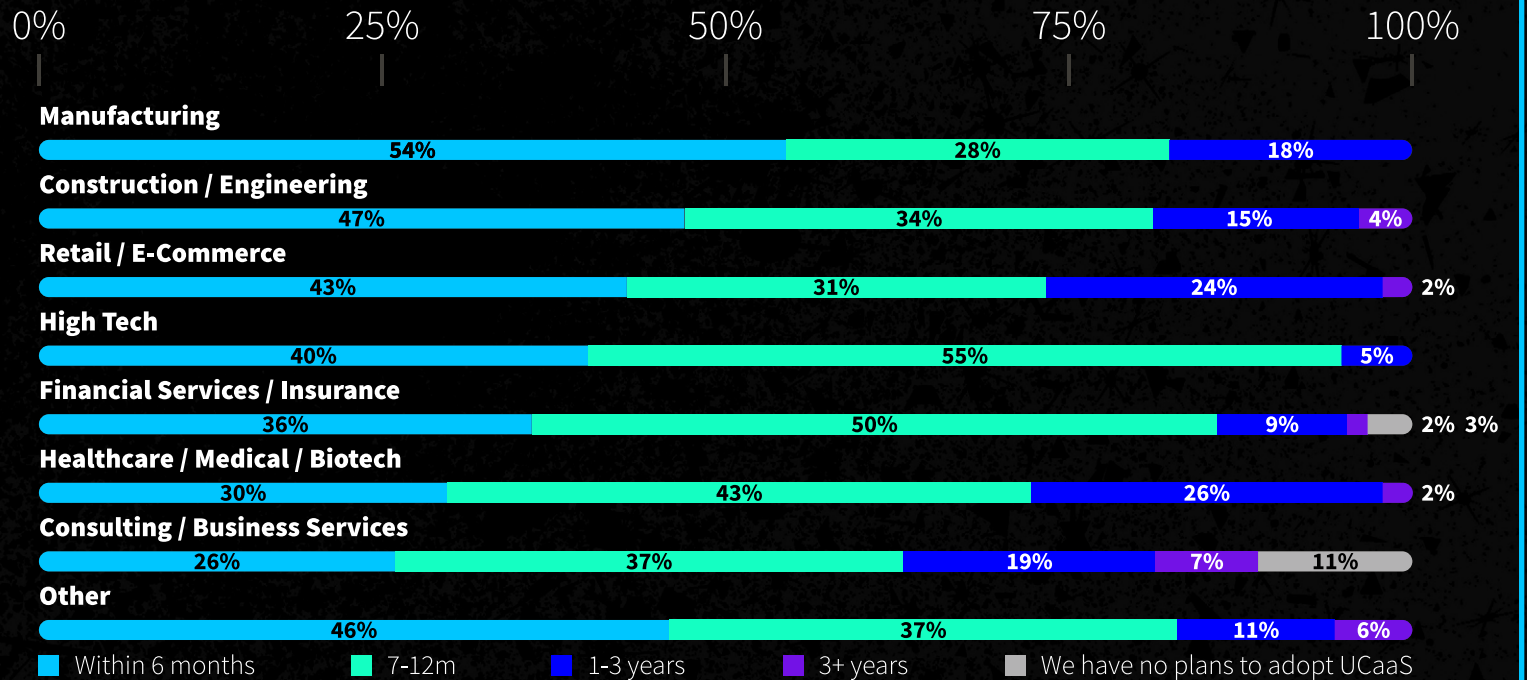
Fig. 4.3 Reason some companies still use legacy telephone systems



Source: AVANT Analytics State of Disruption 2024

In fact, on average, 41% of companies plan to move to UCaaS within the next 6 months, and another 40% will do so within one year. Fifty-four percent of respondents in manufacturing expect to adopt UCaaS in the next six months. In the next seven to 12 months, expect high tech companies (55%), financial services/insurance (50%), and legal firms (50%) to get the ball rolling on UCaaS adoption.

Fig. 4.4 Time frame for UCaaS adoption



Source: AVANT Analytics State of Disruption 2024

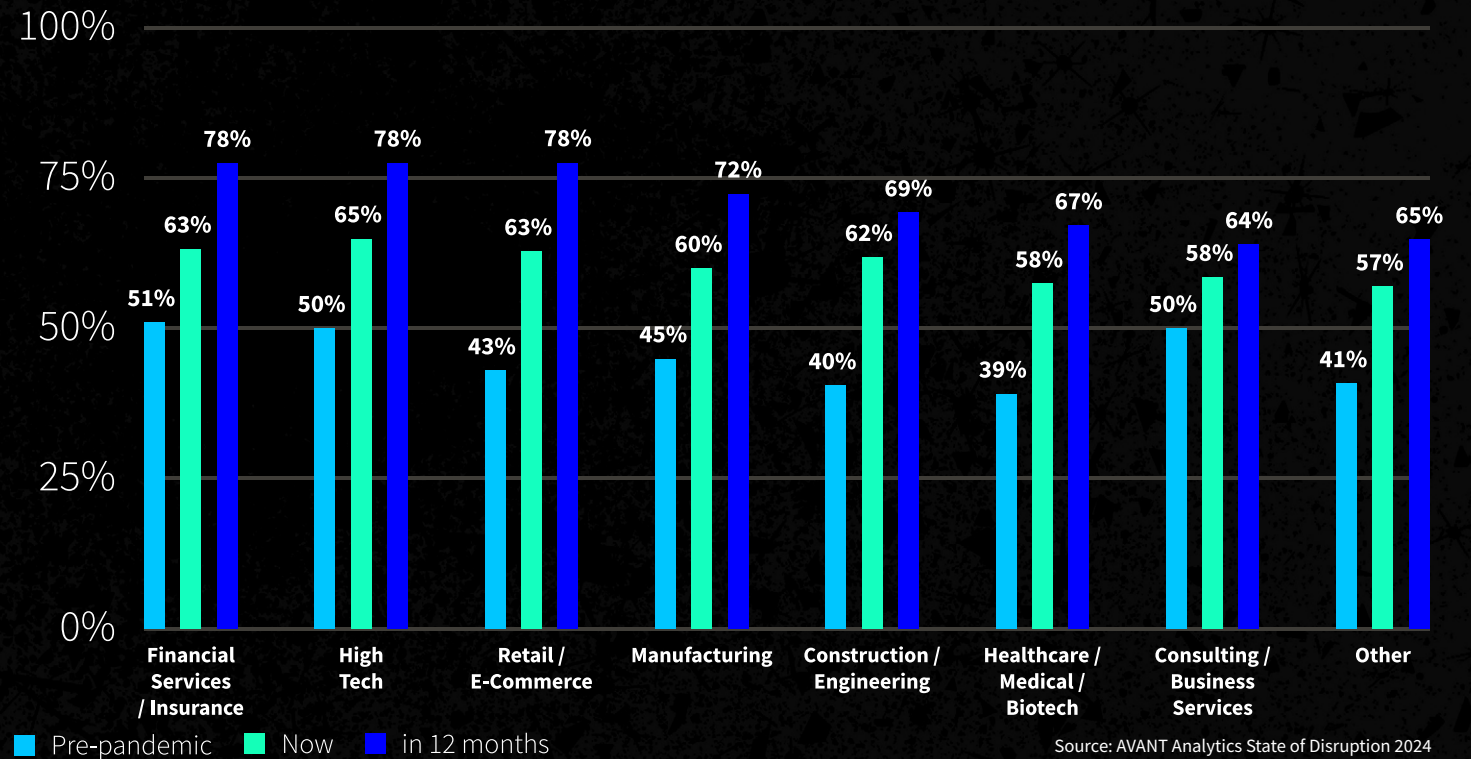


CCaaS

CCaaS (Contact Center as a Service) solutions are cloud-based platforms that enable businesses to deliver customer service and support through a range of channels, including phone, email, chat, social media, and now, video. The rapid development of conversational and generative AI technologies such as ChatGPT has impacted the development of customer service chatbots.

Growth in seats migrating to CCaaS in the next 12 months is expected to be strongest in financial services and retail/e-commerce, followed closely by high tech and manufacturing.

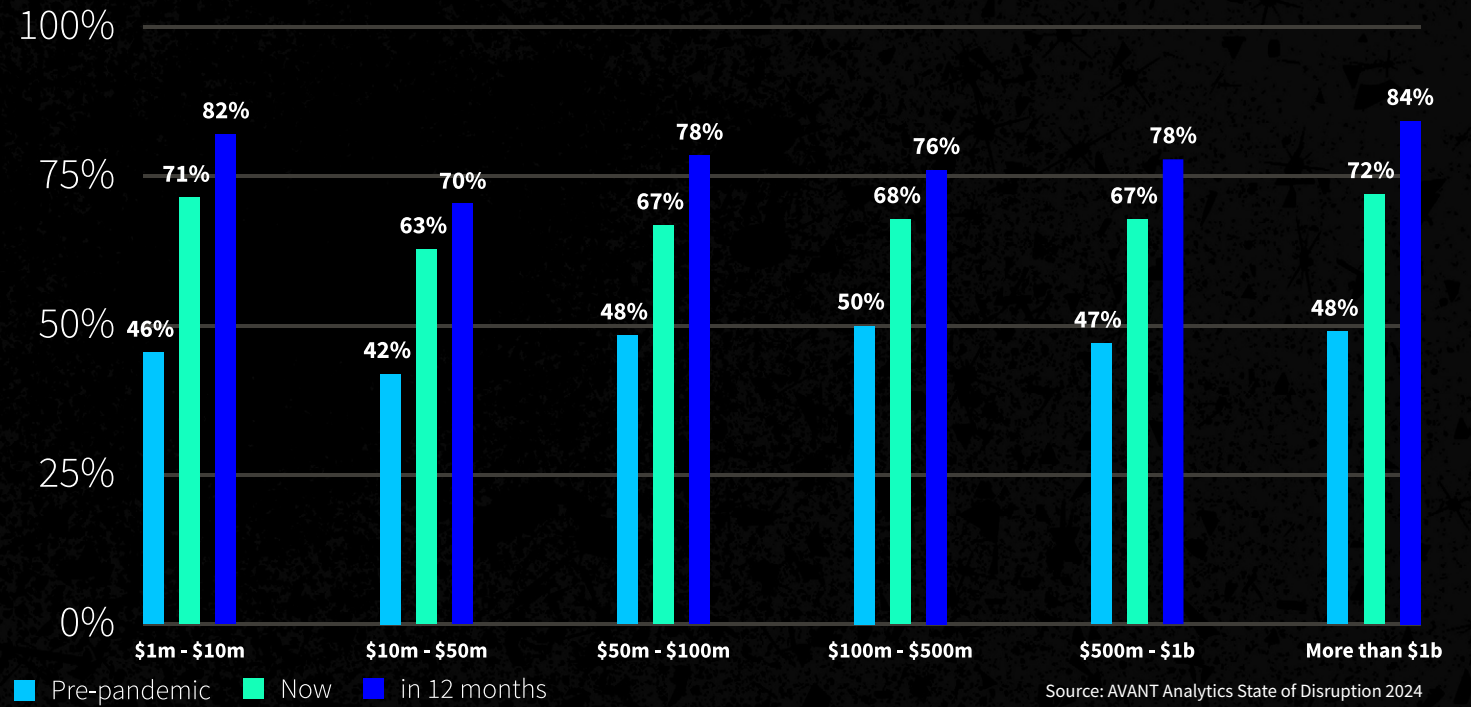
Fig. 5.1 CCaaS seat growth, by vertical



Source: AVANT Analytics State of Disruption 2024

Based on survey responses, AVANT expects strong growth in seats across all sizes of businesses, with companies in the \$50M to \$100M revenue range growing CCaaS seats from 67% to 78% of total seats, while large companies (over \$1B) will grow from 72% to 84%.

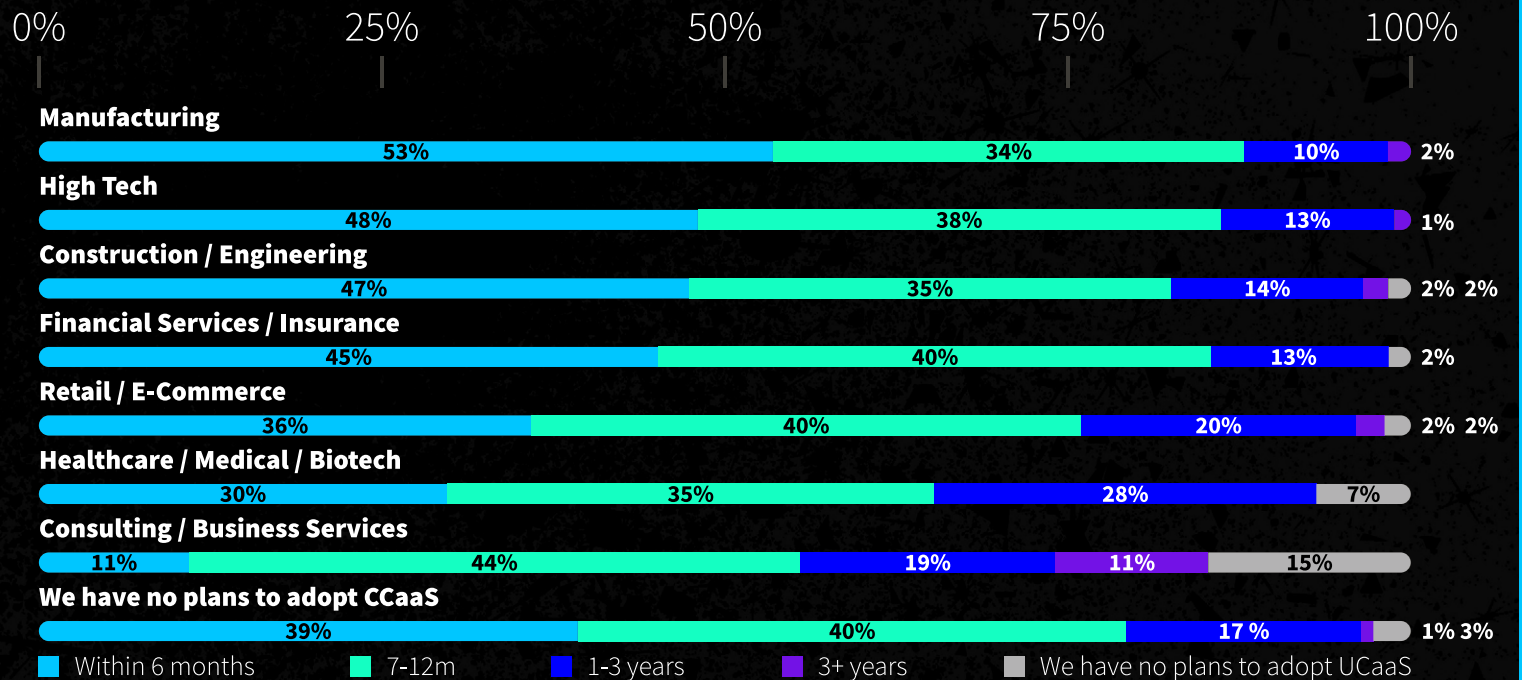
Fig 5.2 CCaaS seat growth, by company revenue



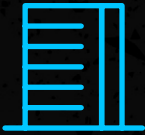
Time frame for CCaaS Adoption

Industries most focused on transitioning remaining legacy contact center systems to CCaaS in the next six months are manufacturing at 53%, followed by high tech at 48%. While retail/e-commerce is the industry that perhaps uses CCaaS most for customer service and support, the industry went through a major upgrade cycle in 2021; this was reflected in data from AVANT's 2021 State of Disruption report showing that 74% of companies were planning their CCaaS upgrade by 2022.

Fig. 5.3 Time frame for CCaaS adoption



Source: AVANT Analytics State of Disruption 2024

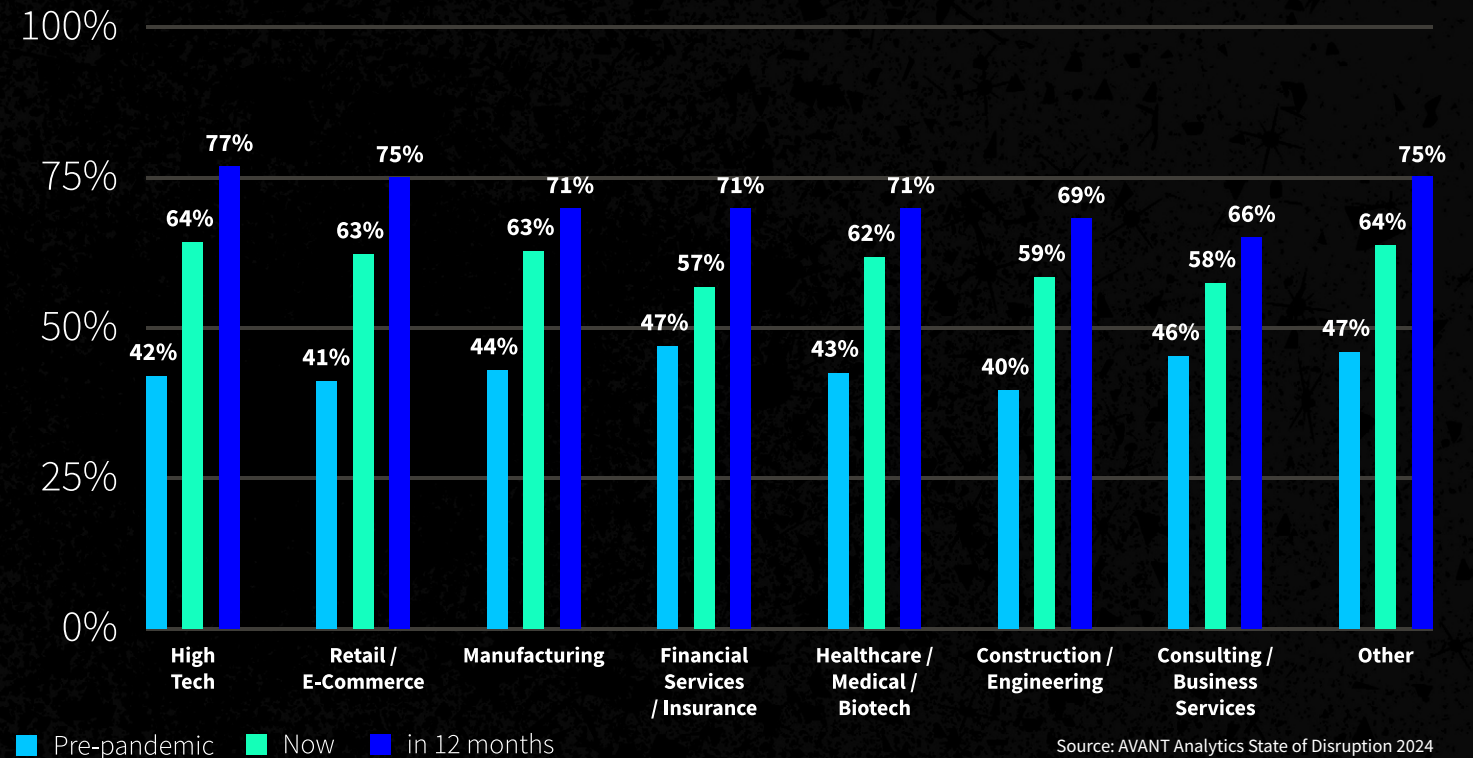


IaaS

Enterprise IT buyers looking at Infrastructure-as-a-service (IaaS) offerings are familiar with the benefits of using virtualized servers in cloud provider data centers: the ability to scale up or scale down based on the current business requirements, with billing on a pay-as-you-go basis; having a cloud service provider manage assets; and the potential to reduce costs and complexity associated with managing a legacy data center.

Today's buyers might be dealing with questions about strategies for hybrid cloud and multi-cloud. Hybrid cloud refers to the use of a combination of public and private clouds, while multi-cloud typically refers to the use of multiple public cloud providers. In a hybrid cloud environment, companies can leverage the benefits of both private and public clouds, such as increased security and scalability. In contrast, multi-cloud environments allow companies to avoid vendor lock-in and achieve greater flexibility by using multiple cloud providers.

Fig 6.1 IaaS growth (measured in seats/employees served), by vertical

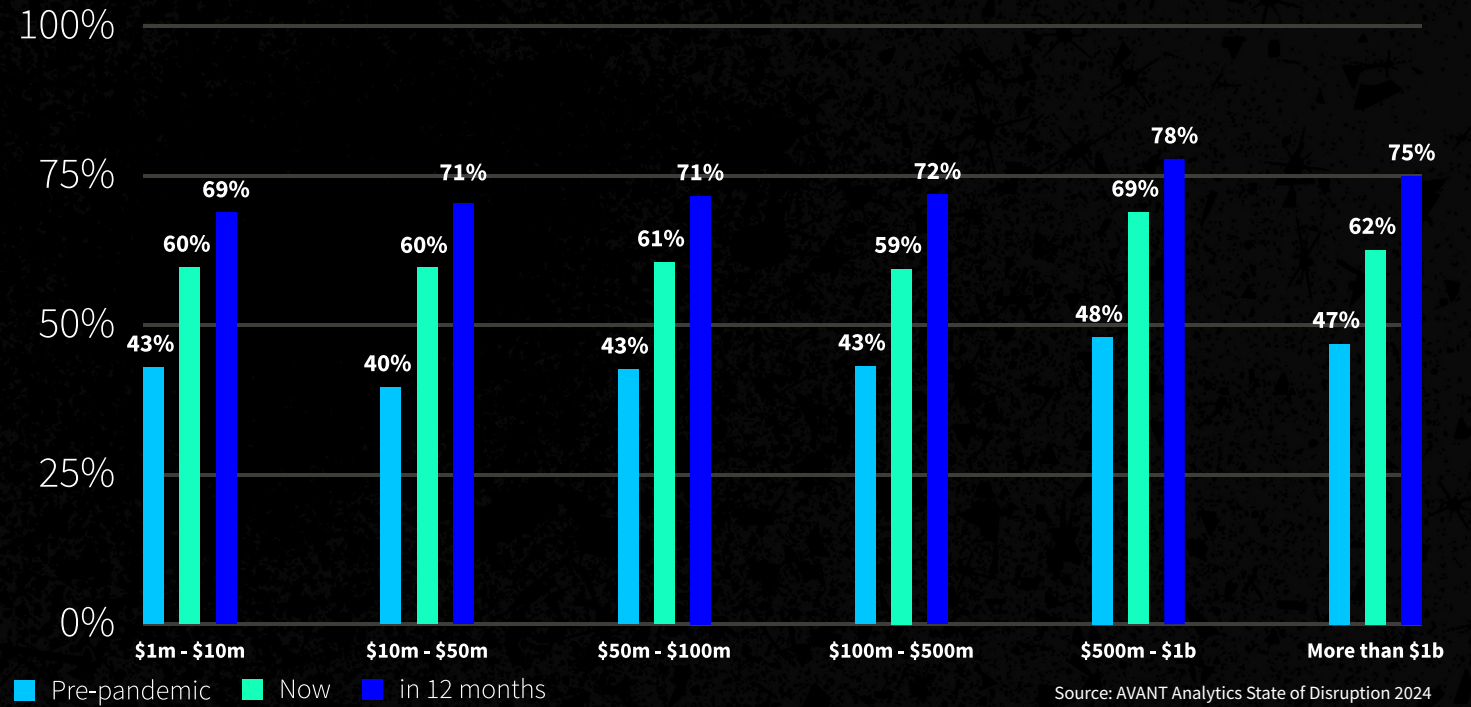


Whatever flavor of cloud architecture is being deployed, adoption has increased significantly compared to pre-pandemic levels according to survey respondents. Note that respondents were asked to estimate the growth in terms of seats, or the number of employees served by IaaS, not by revenue or number of applications.

As seen in Figure 6.1, the top sectors for adoption in the next 12 months are financial services (an increase of 14%) and high tech (an increase of 13%).

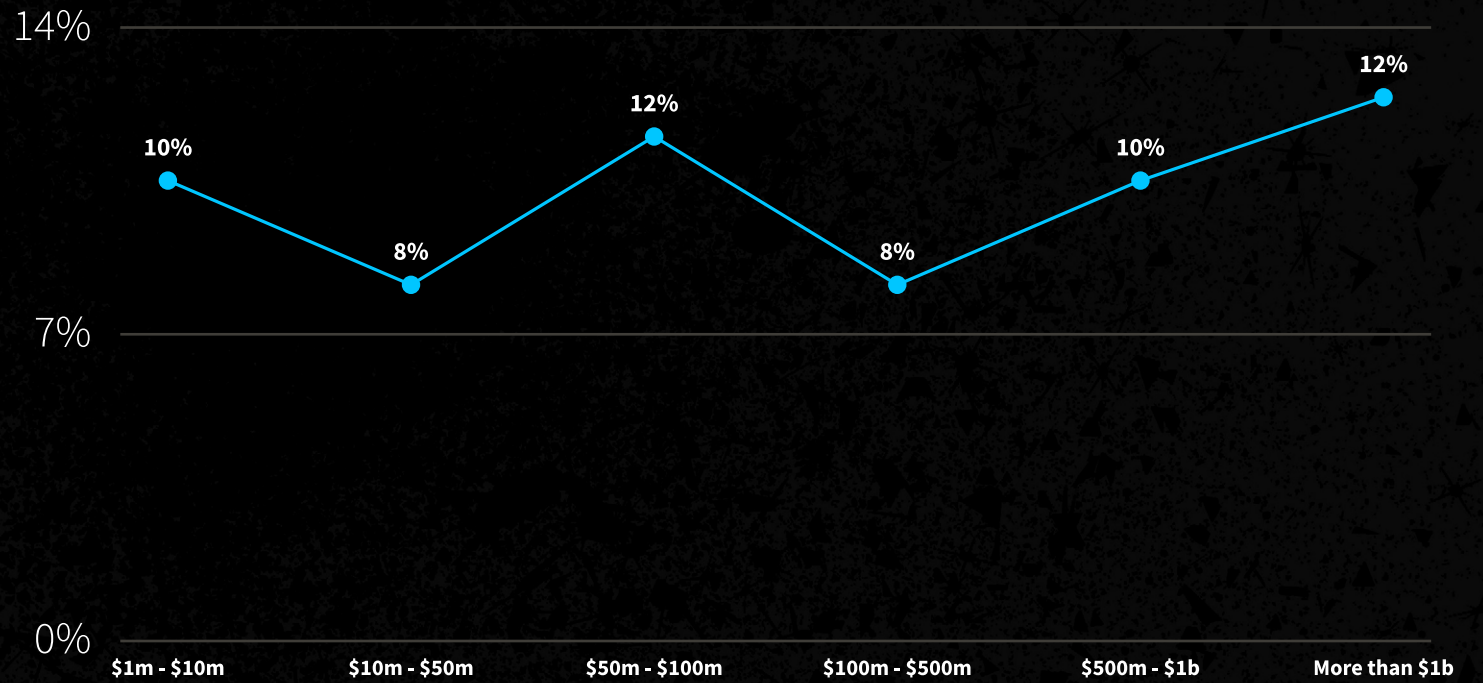
Looking at IaaS adoption in the next 12 months by company size (Fig. 6.2), growth is fairly even across different companies, with those in the \$100 million to \$500 million and the \$1 billion plus club expecting to increase adoption the most over current levels.

Fig. 6.2 IaaS growth by company revenue



Companies in the \$50-\$100 million range are expected to grow IaaS use by 12%, as are companies over \$1 billion in revenue.

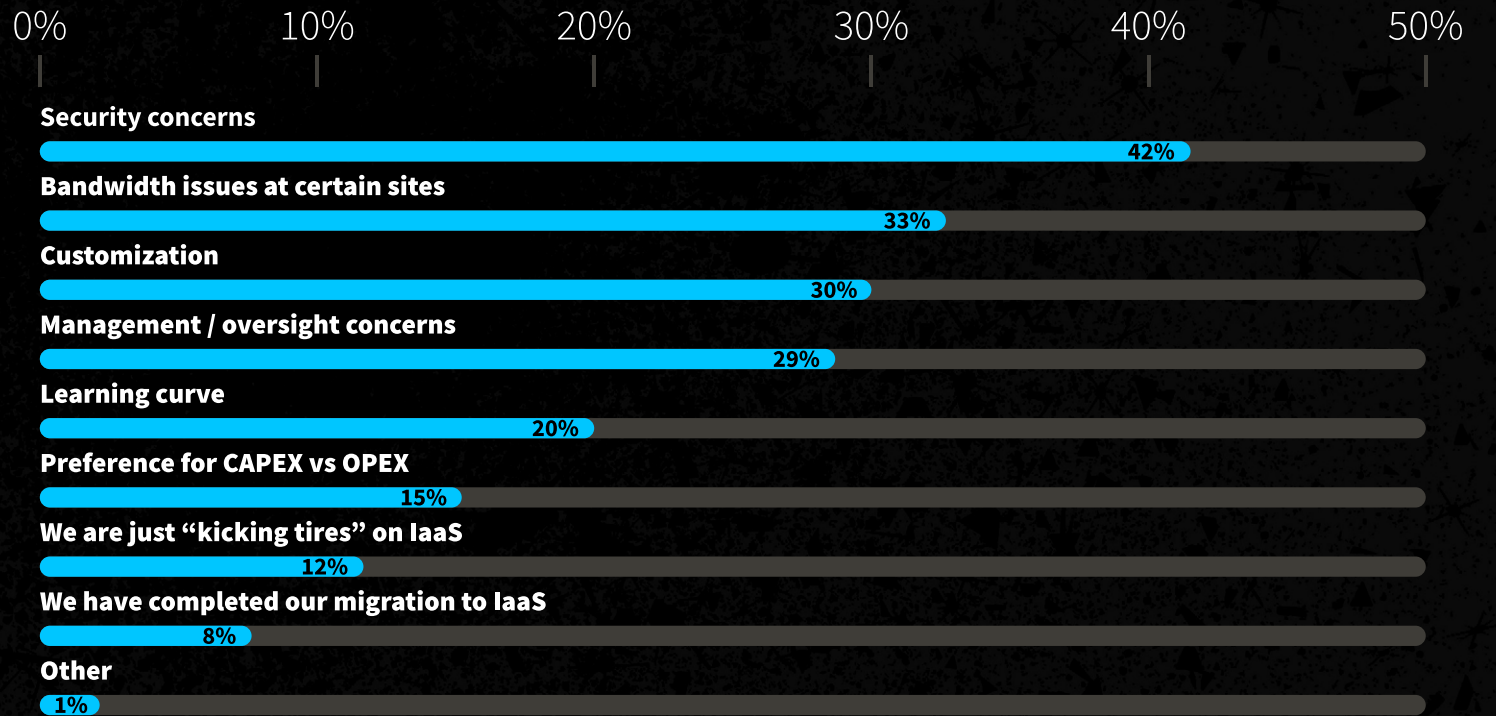
Fig. 6.3 Percentage increase of IaaS in 12 months



Source: AVANT Analytics State of Disruption 2024

When asked why legacy on-premises solutions would still be in use, respondents unsurprisingly listed security as their top concern. That's the same position as our previous survey, though fewer cited it (42%) in 2024 compared to 56% in 2020. Bandwidth issues slightly outpaced customization as secondary and tertiary concerns. Few companies have yet to fully migrate to IaaS, with only 8% indicating they have done so, compared to 6% in our previous report.

Fig. 6.4 Reason some companies still use legacy systems



Source: AVANT Analytics State of Disruption 2024

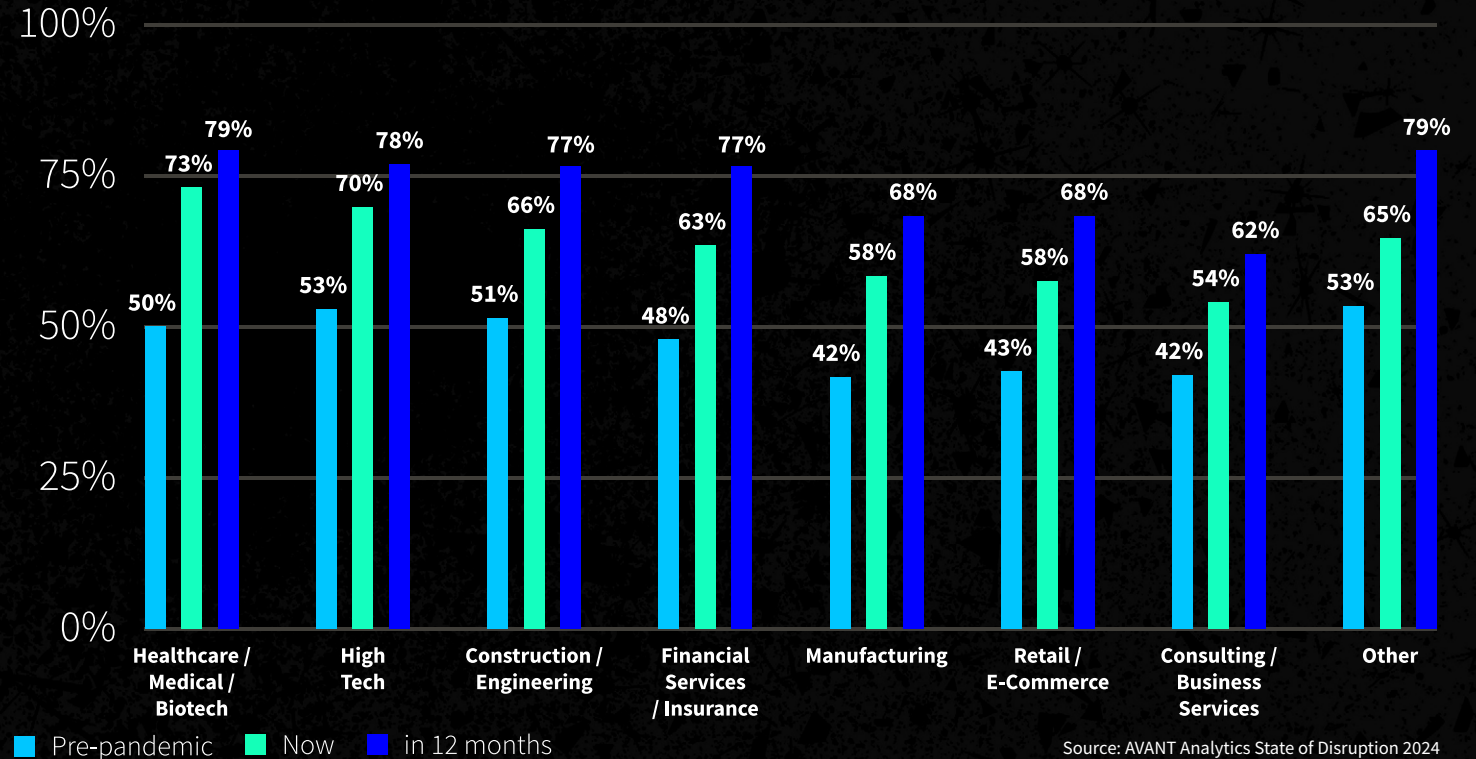


Colocation

Colocation service providers offer power, bandwidth, cooling, and physical security in a data center facility, giving businesses the ability to rent space for their servers and other computing hardware. Because of the high cost of building new data center space, enterprises are increasingly turning to colocation providers in a trend that has parallels to the move to IaaS.

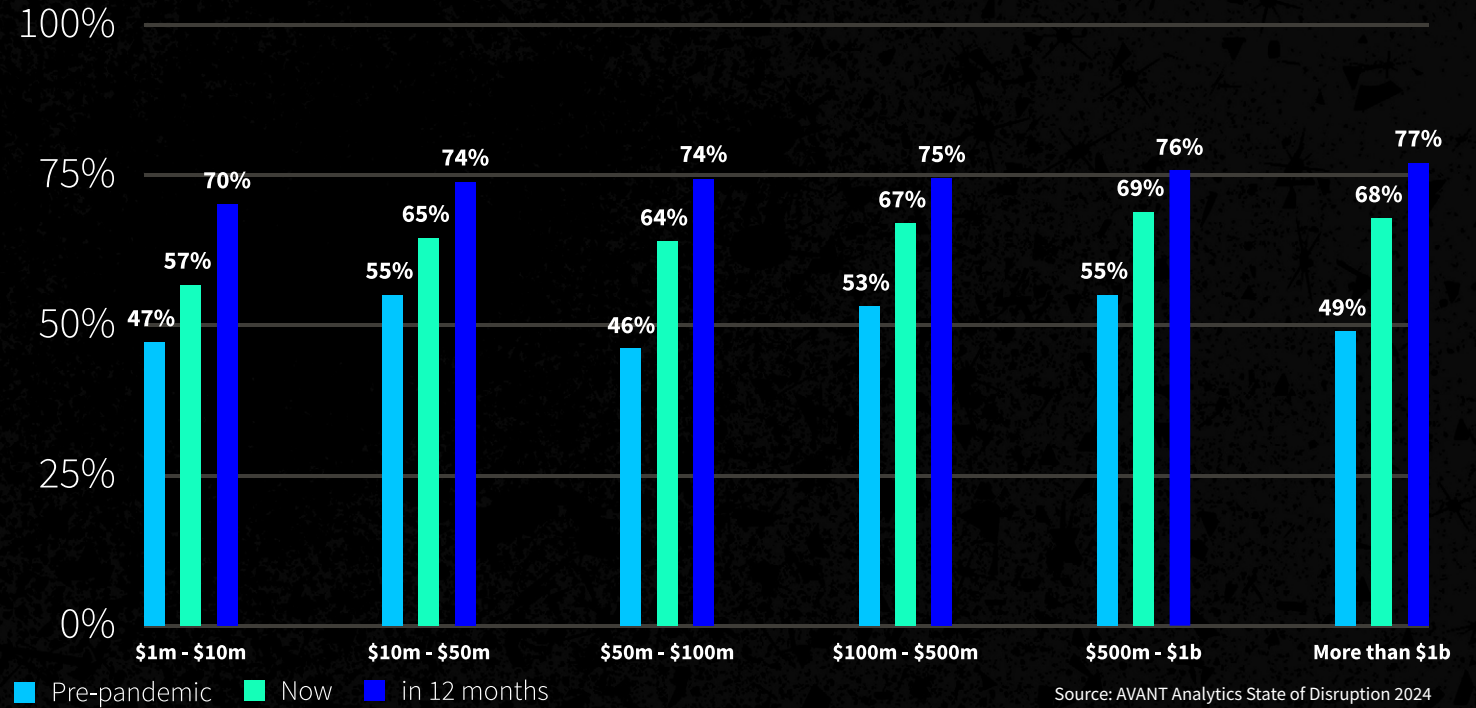
Respondents were asked about the percentage of equipment that has been/will be migrated to colocation services, as opposed to premises-based systems. The top three industries that are expected to grow their use of colocation services in the next 12 months are energy, healthcare/medical (including biotech), and legal services, according to survey respondents. Data privacy and regulatory concerns are helping to drive growth for colocation services, as companies still own and manage their own equipment.

Fig. 7.1 Percentage of legacy equipment in Colocation vs remaining on premises, by vertical



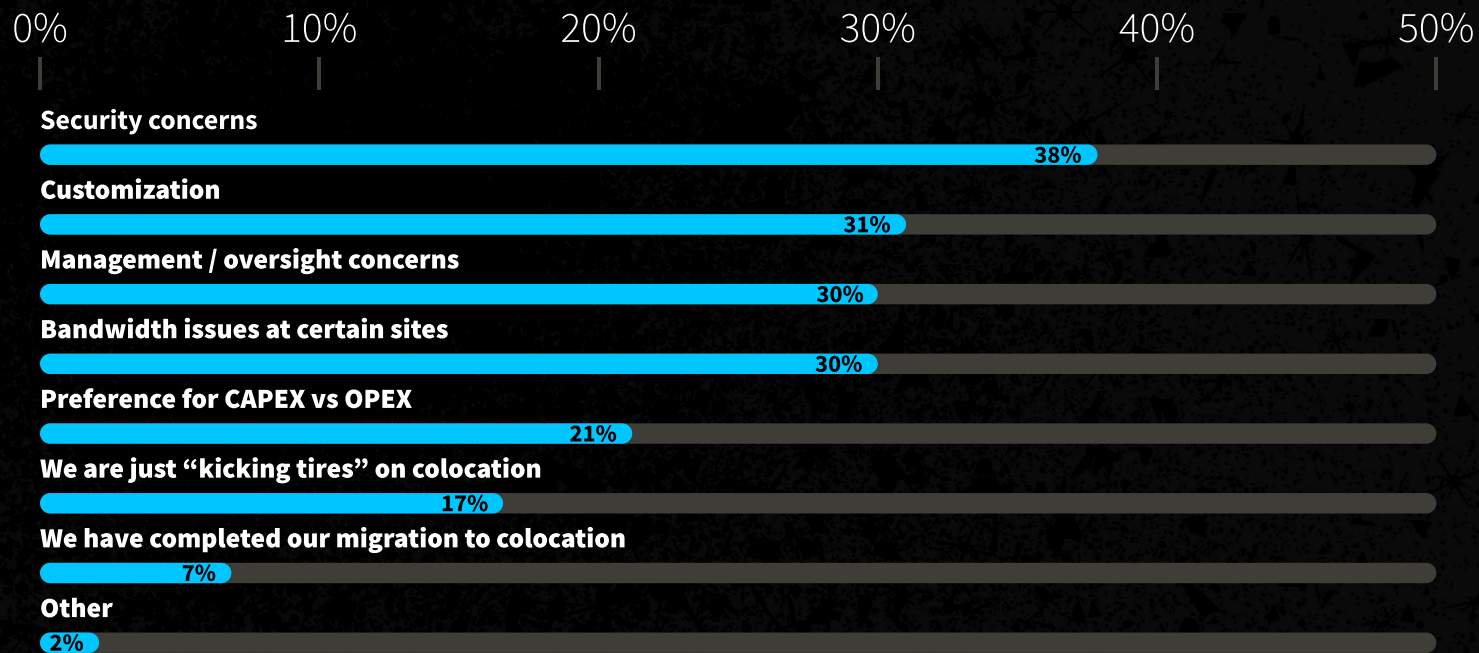
Medium and large enterprises have already moved a significant amount of IT infrastructure into colocation facilities, but companies under \$100M in size are also close behind in their adoption of colo services; growth in adoption is highest among companies between \$1 million and \$10 million (13% increase in the next 12 months) and those that are between \$50 million to \$100 million (10%), according to AVANT's survey results.

Fig. 7.2 Percentage of equipment in colocation by company revenue



Survey respondents who are less inclined to adopt colocation most frequently cite security concerns as their primary reasons. Security was the top concern in both AVANT State of Disruption surveys but appears to be less of a factor for respondents in 2024 (33%) compared to the previous study (55%). Other issues also factor into the equation, as shown on the following chart.

Fig. 7.3 Reason some companies have not migrated to colocation services



Source: AVANT Analytics State of Disruption 2024

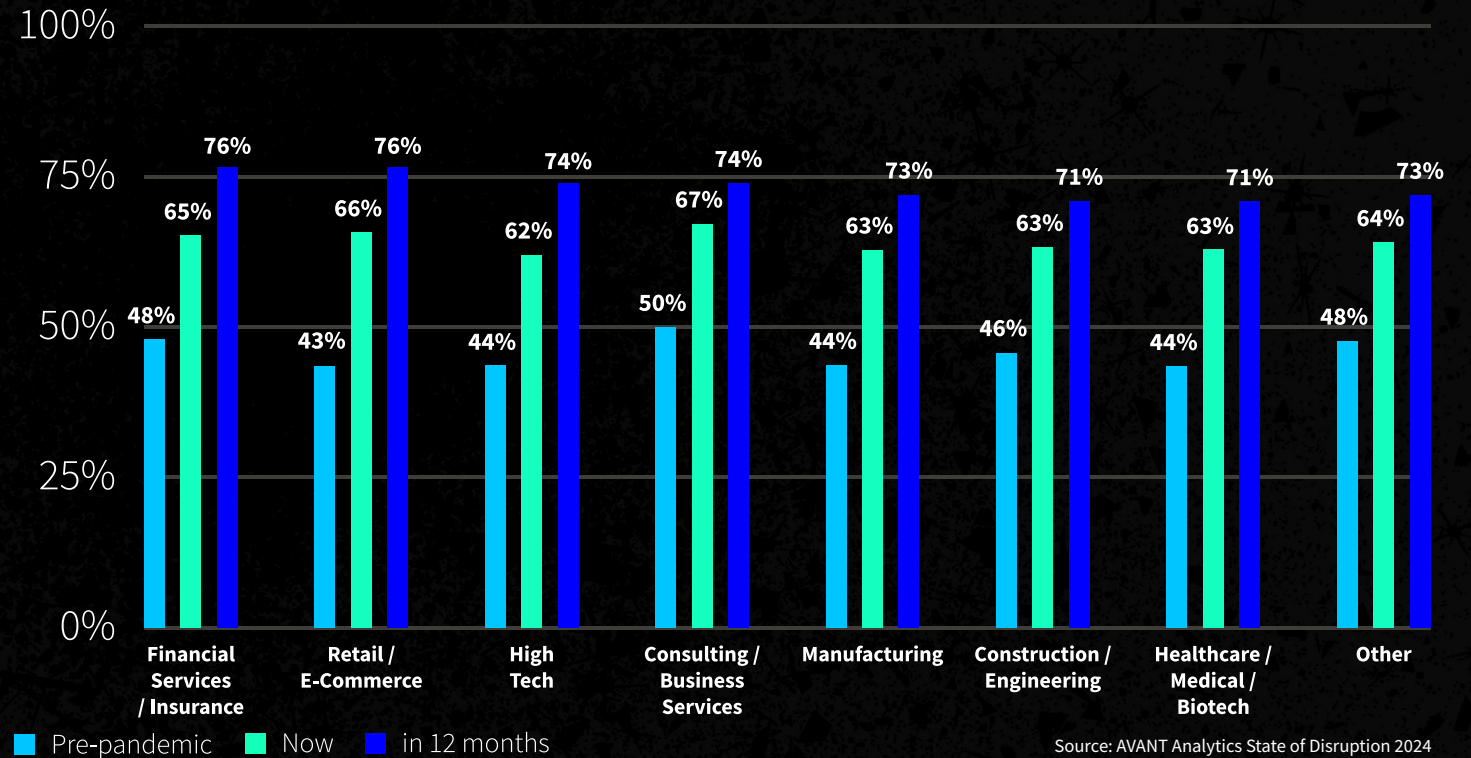


Cloud-based Applications

The cloud software as a service market (SaaS) grew 12% in 2022 and is expected to grow 14% in 2023 to \$195 billion, according to Gartner. These figures include everything from basic office-style tools to advanced ERP, CRM, and more.

AVANT asked executives what percentage of applications were cloud-based before the pandemic compared to 2023, then what they expect that percentage to be in 2024. Adoption is roughly similar across industries. The average predicted growth of adoption across all categories over the next 12 months is 9%.

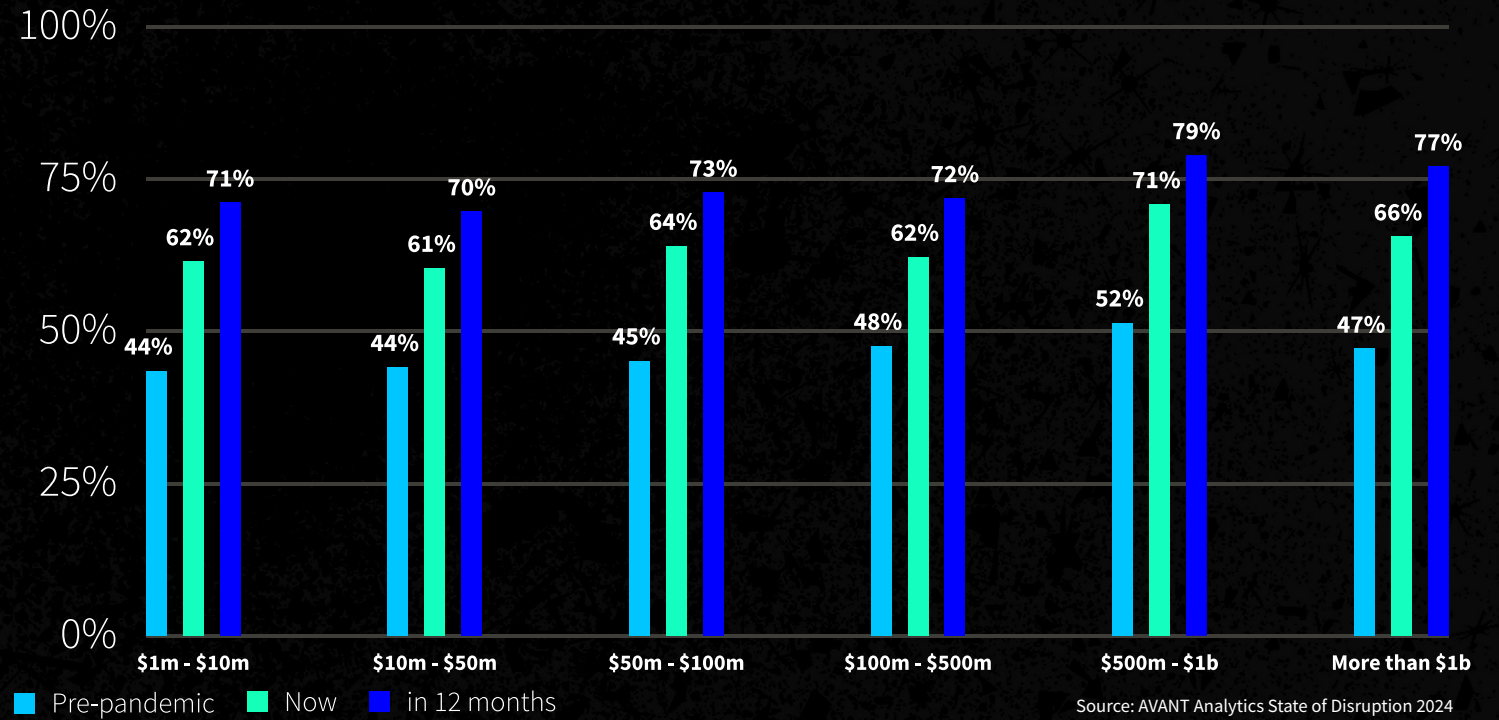
Fig. 8.1 **Cloud-based application (SaaS) growth by vertical**



Source: AVANT Analytics State of Disruption 2024

SaaS as a percentage of all enterprise applications is expected to top 70% across all industries in the next 12 months, according to AVANT's survey data. Companies in the \$500 million to \$1 billion segment expect to approach the 80% adoption mark during the same period.

Fig. 8.2 **Cloud-based application (SaaS) growth by company revenue**



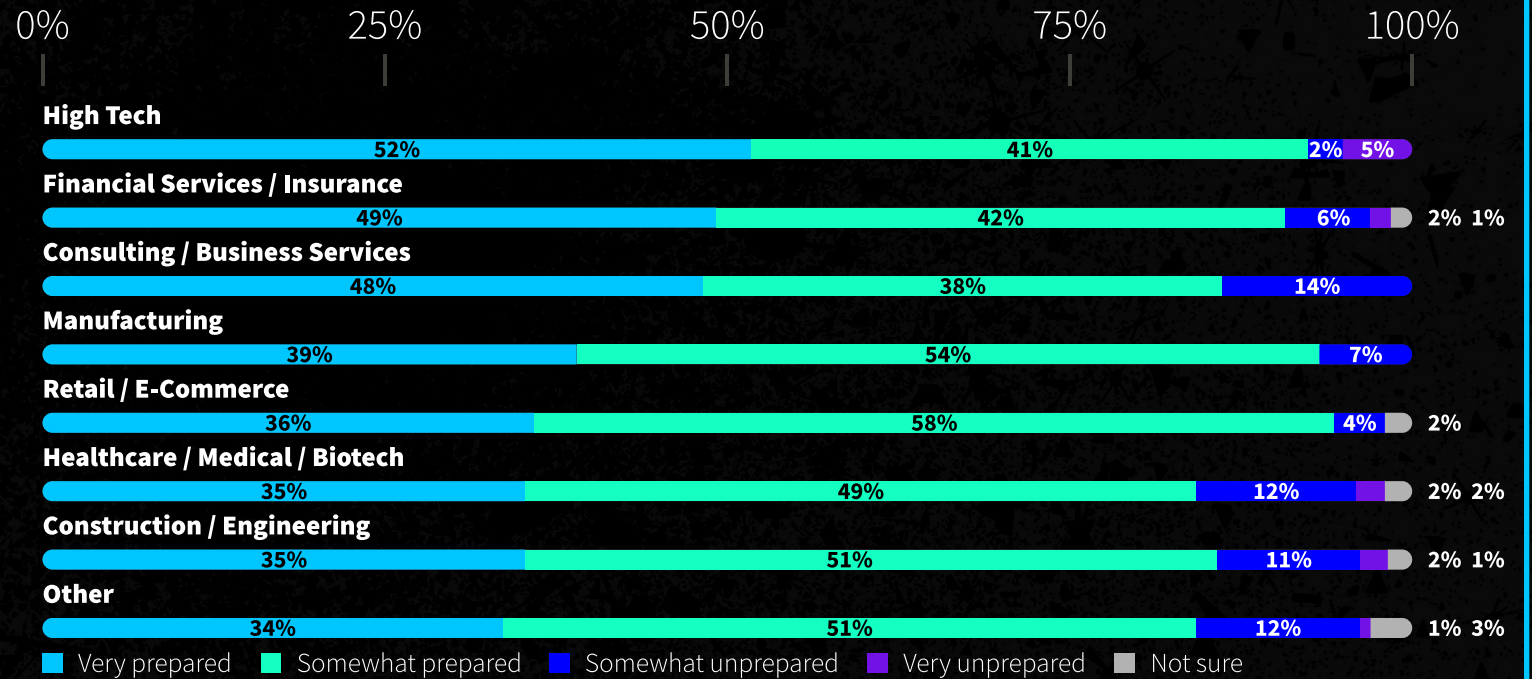


Security

Cybersecurity concerns are omnipresent; ransomware attacks on almost every industry keep the topic top of mind. On the positive side, only two percent of survey respondents feel their companies are very unprepared to respond to a cyber attack.

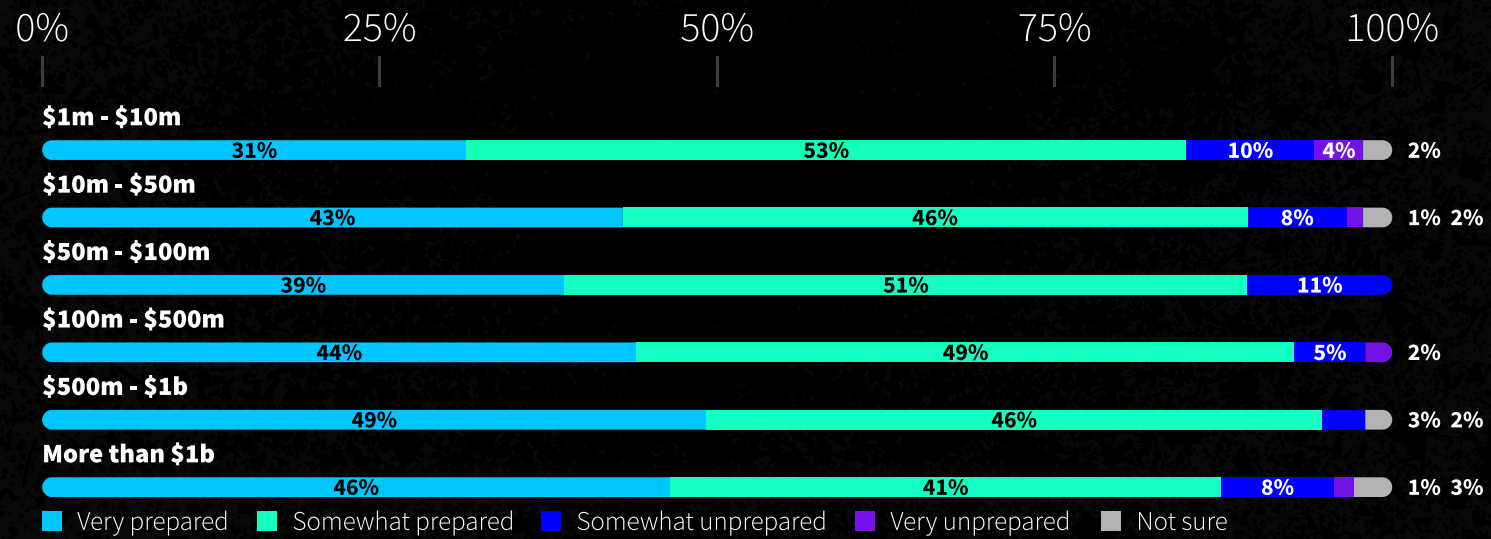
On the other hand, 39% say they are very prepared. High tech companies are the most confident, with 52% of respondents saying they are very prepared for attacks.

Fig. 9.1 Preparedness for cyber attack by vertical



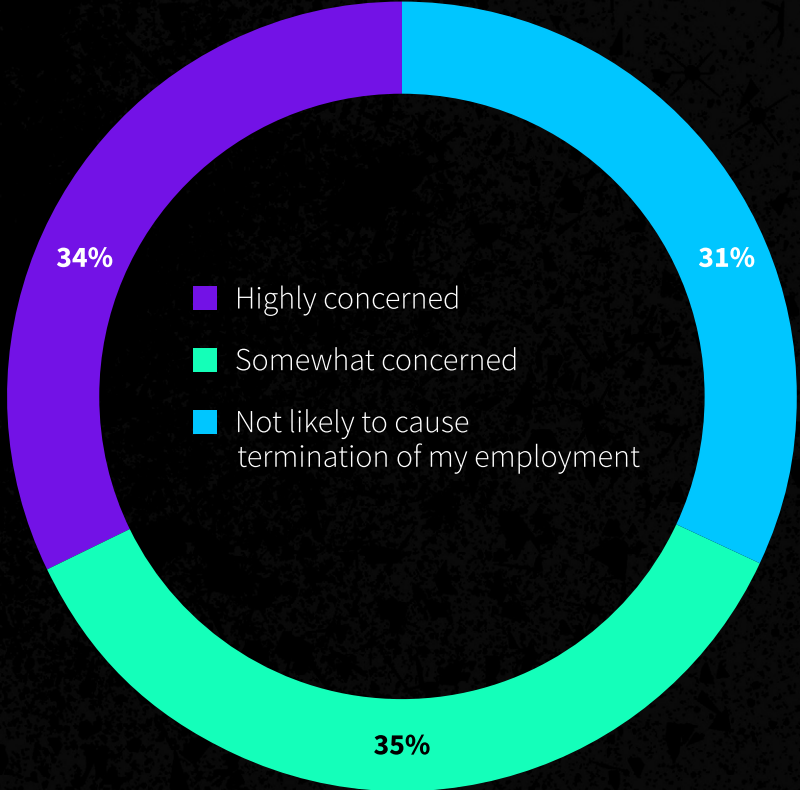
Source: AVANT Analytics State of Disruption 2024

Fig. 9.2 Preparedness for cyber attack, by revenue



Source: AVANT Analytics State of Disruption 2024

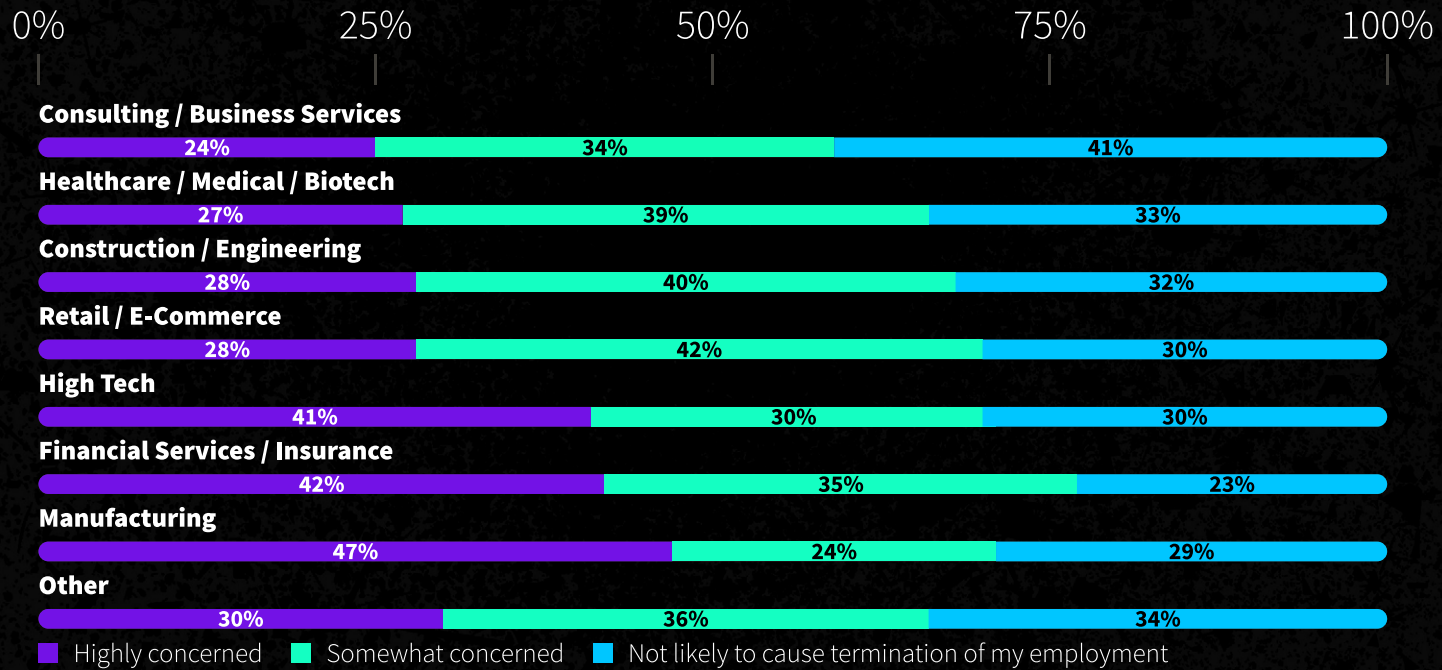
Fig. 9.3 Breaches: perceived risk to employment



In terms of how a breach would impact their employment, 69% of survey respondents expressed concern that a data breach could bring about termination of their employment compared to 71% in AVANT's 2021 report. Topping the list of most concerned: high tech workers were highly concerned about a data breach resulting in getting fired, followed by employees in manufacturing and financial services.

Source: AVANT Analytics State of Disruption 2024

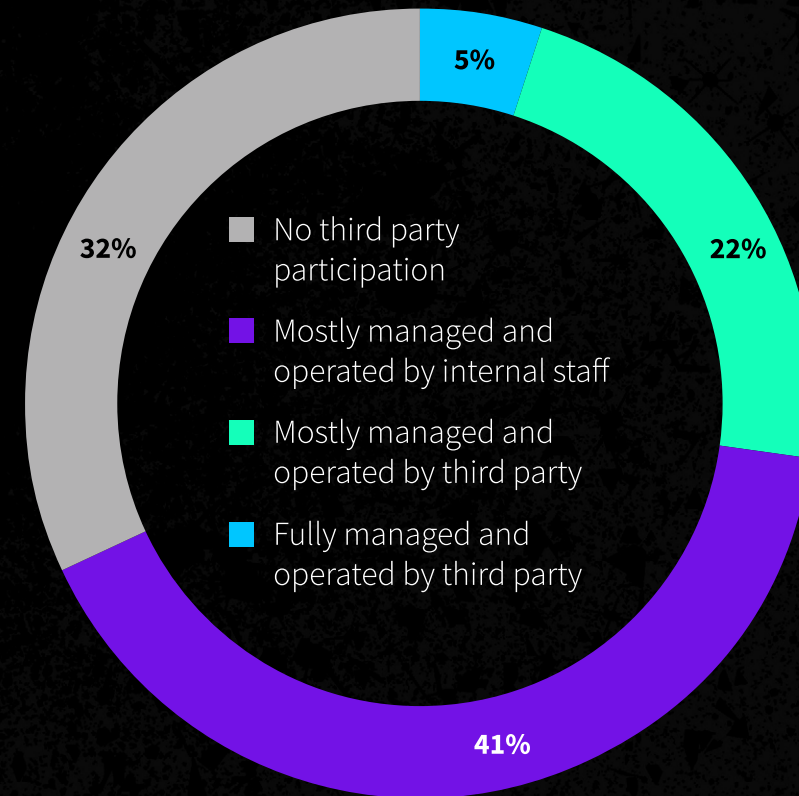
Fig 9.4 Breaches: Perceived risk to employment, by industry



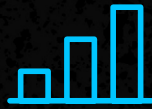
Source: AVANT Analytics State of Disruption 2024

Forty-one percent of survey respondents reported that their security management is mostly managed by internal staff, while 32% said there was no third-party participation. The latter was an increase over 2021 results of 19%.

Fig. 10.1 Security: internal vs. outsourced



Source: AVANT Analytics State of Disruption 2024

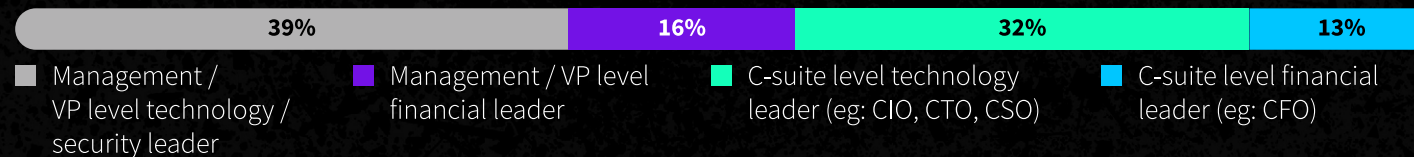


Survey Methodology and Demographics

AVANT polled 501 U.S.-based enterprise decision makers at either the C-suite or Management/VP-level in IT, security, or finance. To qualify for the survey, respondents had to be involved in choosing or helping their organization to implement new data network, voice or computer infrastructure technology including buying and/or selecting new tools and services.

Respondents include statistically significant subsets from the following five industries: Manufacturing, Financial Services, Healthcare/Medical, Ecommerce and Consulting/Business Services. Additionally, in order to ensure that the results of the survey are representative of the distribution of establishments in the U.S., a weighting scheme was applied based on number of employees in the respondent company.

Fig. 10.2 Job level

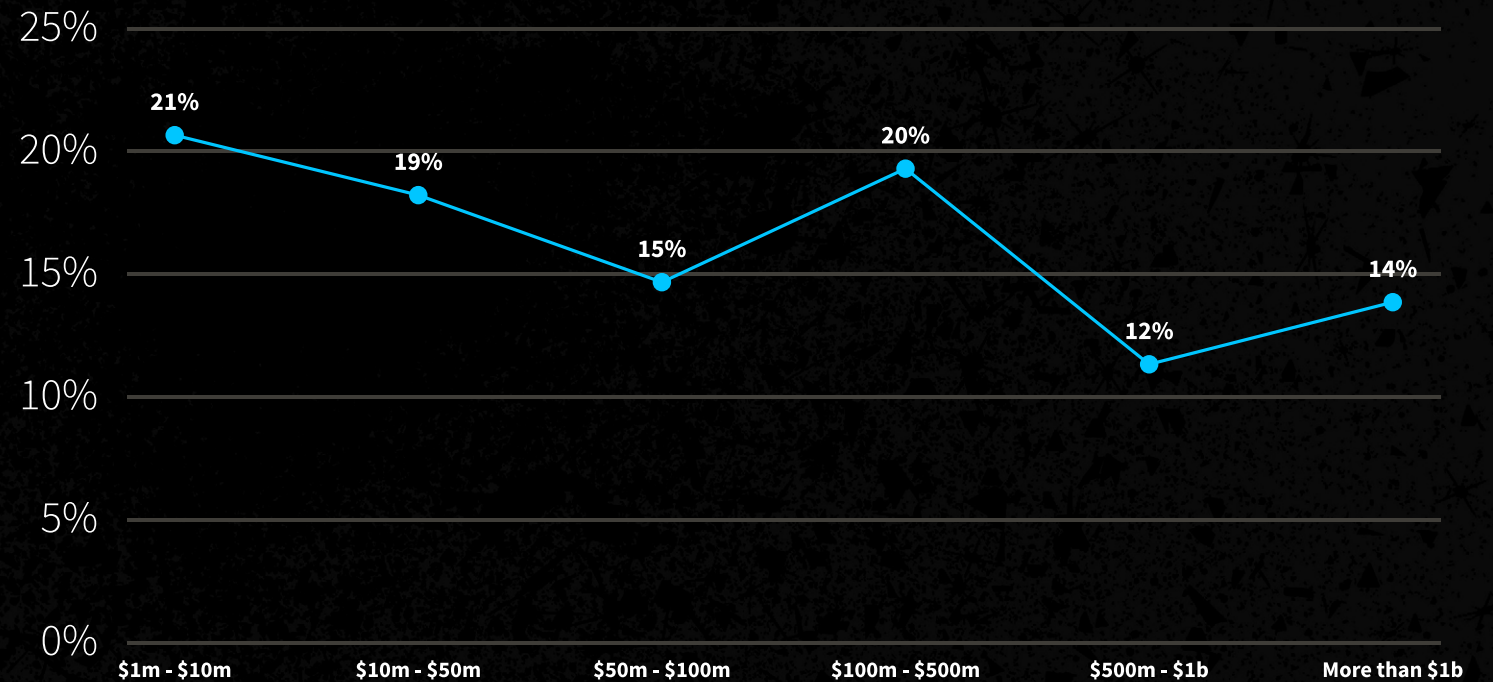


Source: AVANT Analytics State of Disruption 2024

Of the respondents, 32% were technology leaders in the C-Suite (including CIO, CTO, CSO). Another 39% of respondents were management of VP-level technology or security leaders.

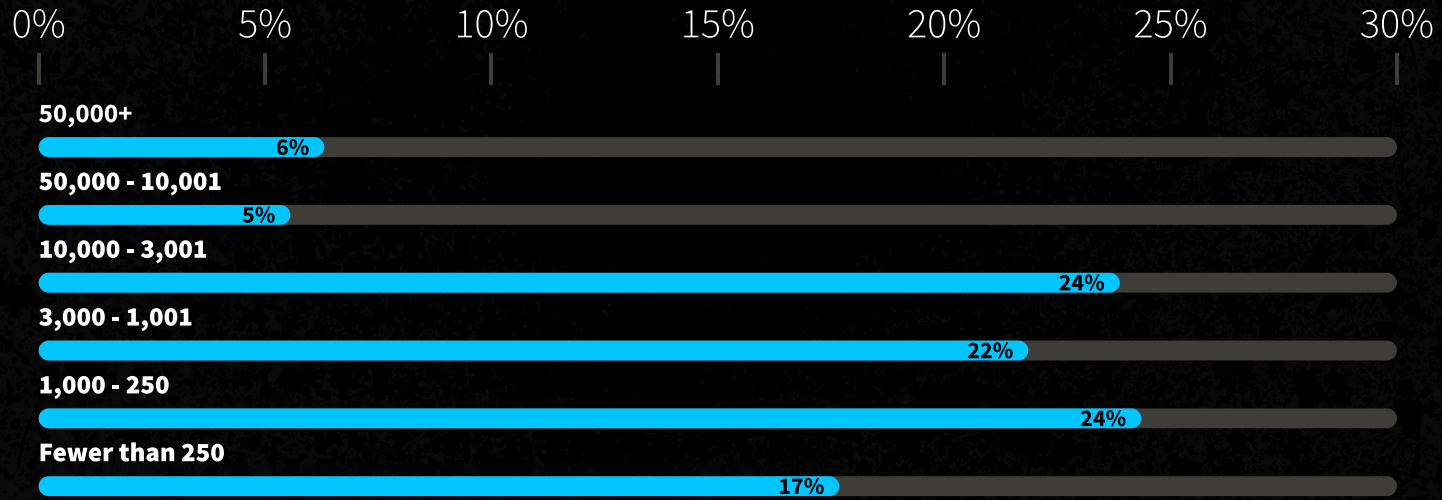
In terms of company size by revenue, 21% of respondents reported their company's revenue was between \$1 to \$10 million; 20% were at companies with between \$100 to \$500 million in revenue; and another 19% at companies with revenue between \$10 to \$50 million.

Fig. 10.3 **Company size, by revenue**



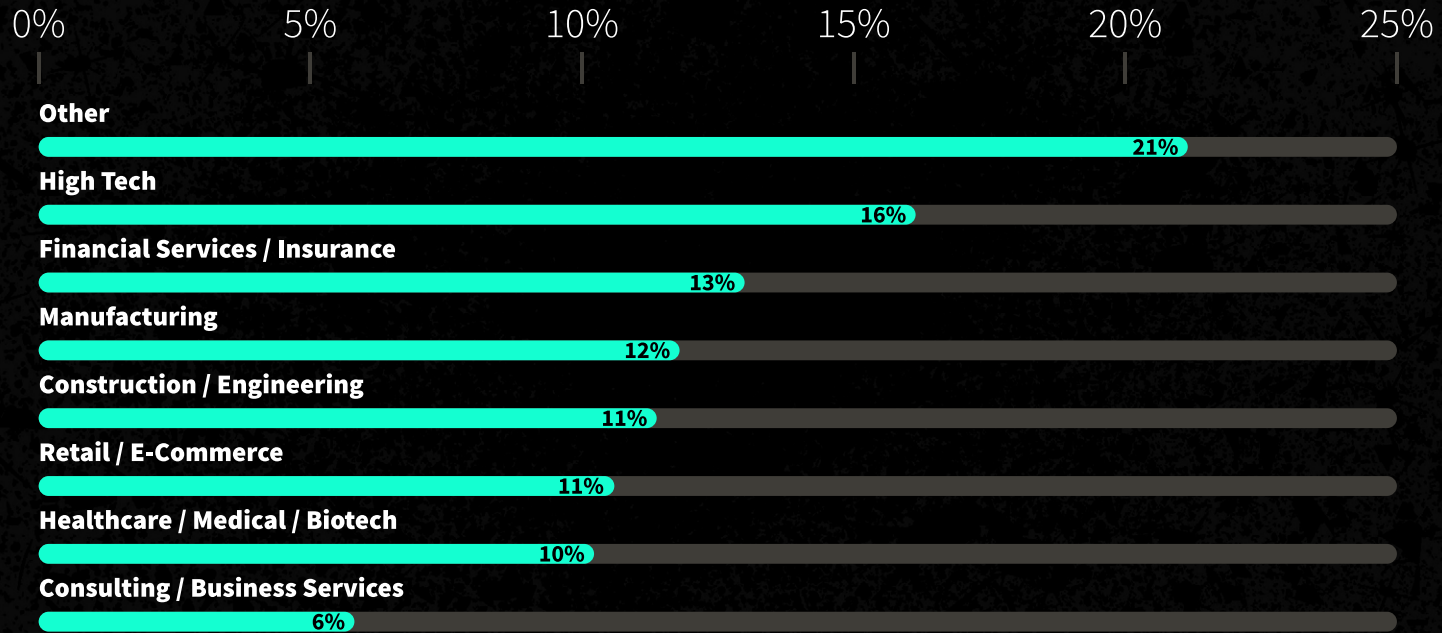
Source: AVANT Analytics State of Disruption 2024

Fig. 10.4 Number of employees



Source: AVANT Analytics State of Disruption 2024

Fig. 10.5 Industries surveyed included the following



Source: AVANT Analytics State of Disruption 2024

Where the number of responses was not statistically significant, responses were included in the “Other” category. Industries in this category include government, media, hospitality, food/beverage and education.

References

¹ <https://www.conference-board.org/research/us-forecast>

² <https://www.gartner.com/en/newsroom/press-releases/2023-04-06-gartner-forecasts-worldwide-it-spending-to-grow-5-percent-in-2023>

³ <https://www.idc.com/getdoc.jsp?containerId=prUS50985423>



Acknowledgements

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