



# IDC Survey: SMB Communications Services Survey, 2025 — AI Adoption in SMB Communications

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# Executive summary

## AI investment is moving from exploration to structured deployment

1

Generative AI is now the top SMB technology investment priority, with agentic AI emerging as well, confirming that SMBs are moving beyond passive evaluation toward structured spending plans and operational deployment in the next 12–18 months.

## Competitive advantage is increasingly tied to customer engagement and data-driven decisioning

2

SMBs are now viewing GenAI to reshape how they engage customers and use data to inform decisions, reframing AI from an internal efficiency tool to a growth and differentiation lever embedded within communications, collaboration, and analytics-driven workflows.

## Execution readiness determines the pace of scale

3

Although interest is high, scaling AI remains difficult due to challenges like regulatory and data-governance requirements, cost control, and limited in-house expertise. This underscores the need for secure-by-design solutions and well-defined ROI models and marketing.

## AI monetization will flow through bundled, managed connectivity models

4

Broadband remains the anchor service in the SMB relationship, but strategic influence over AI/AIOps road maps is consolidating with cloud providers and integrators, pressuring telecom and cable providers to evolve toward integrated, managed, and consultative service models to protect wallet share and relevance.



# Research objectives

This IDC Survey includes data from IDC's September 2025 *U.S. SMB Communications Services Survey*, examining how AI is reshaping SMB communications priorities, networking strategies, and provider influence.

This research examines whether generative and agentic AI have transitioned from exploratory interest to structured investment within U.S. SMB communications environments. The findings confirm that AI is now a leading technology priority, with adoption concentrated in security, cloud connectivity, and managed networking domains, while governance and execution readiness determine the pace of scale.

- Data presented in this survey is not weighted
- Survey results finalized in September 2025
- Small businesses with 1–99 employees (n = 309)
- Medium-sized businesses with 100–499 employees (n = 204)
- IDC surveyed 513 United States–based decision-makers responsible for network/strategy and operations about their organization's current and future adoption and usage of AI in the SMB space



# Key analysis and findings

**IDC's SMB Communications Services Survey, September 2025: AI Adoption in SMB Communications**

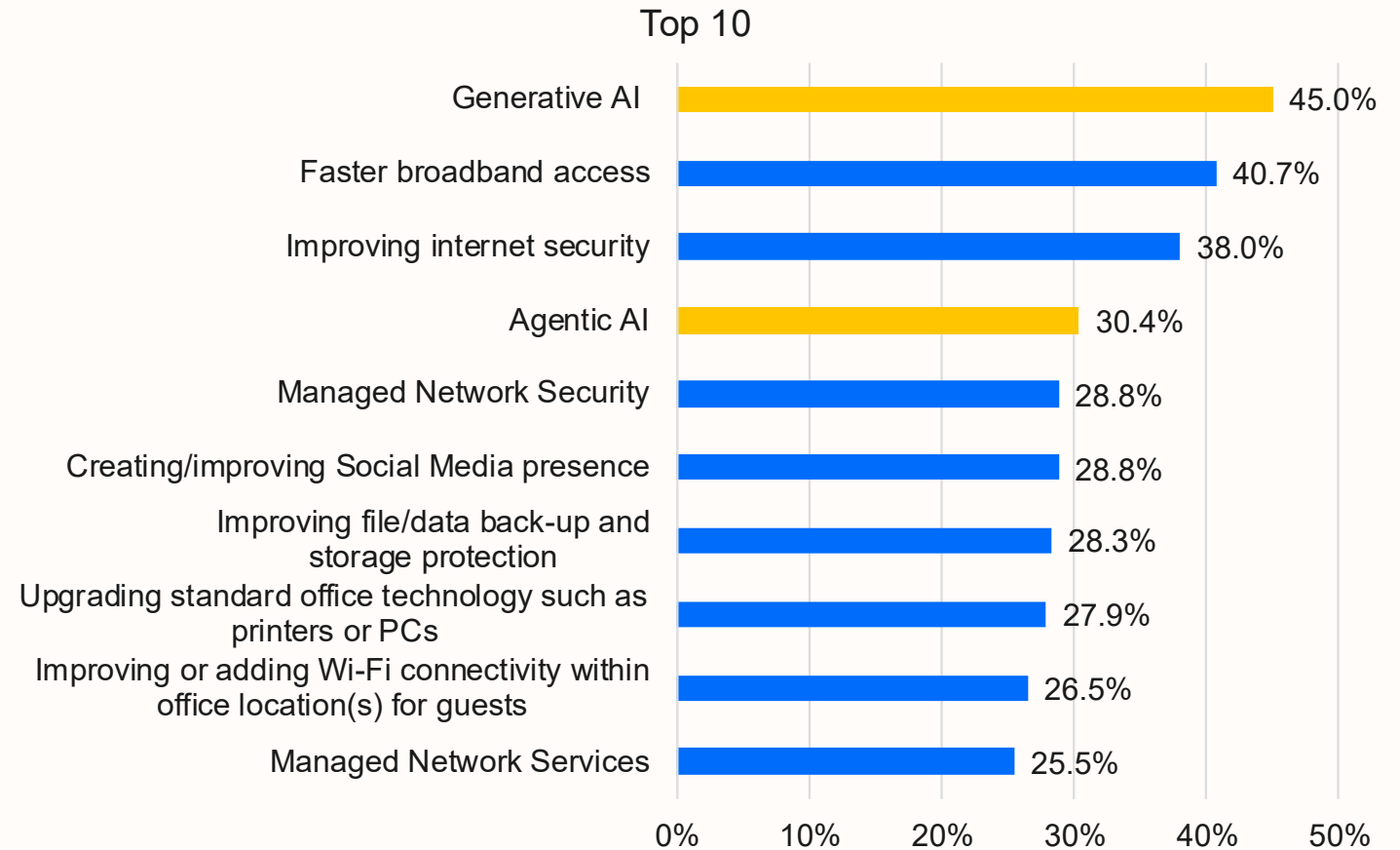


# From infrastructure to intelligence: SMBs are redirecting 2026 tech budgets toward AI-led transformation

GenAI leads SMB tech priorities (+9.6pp YoY), indicating budget reallocation rather than incremental experimentation. AI is competing directly with traditional communications upgrades for priority and funding.

- AI becomes a core attachment to broadband and security bundles, positioning communications providers to monetize managed, outcome-led AI services.

What are the top technology investment priorities for your company in the next 12 months?



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

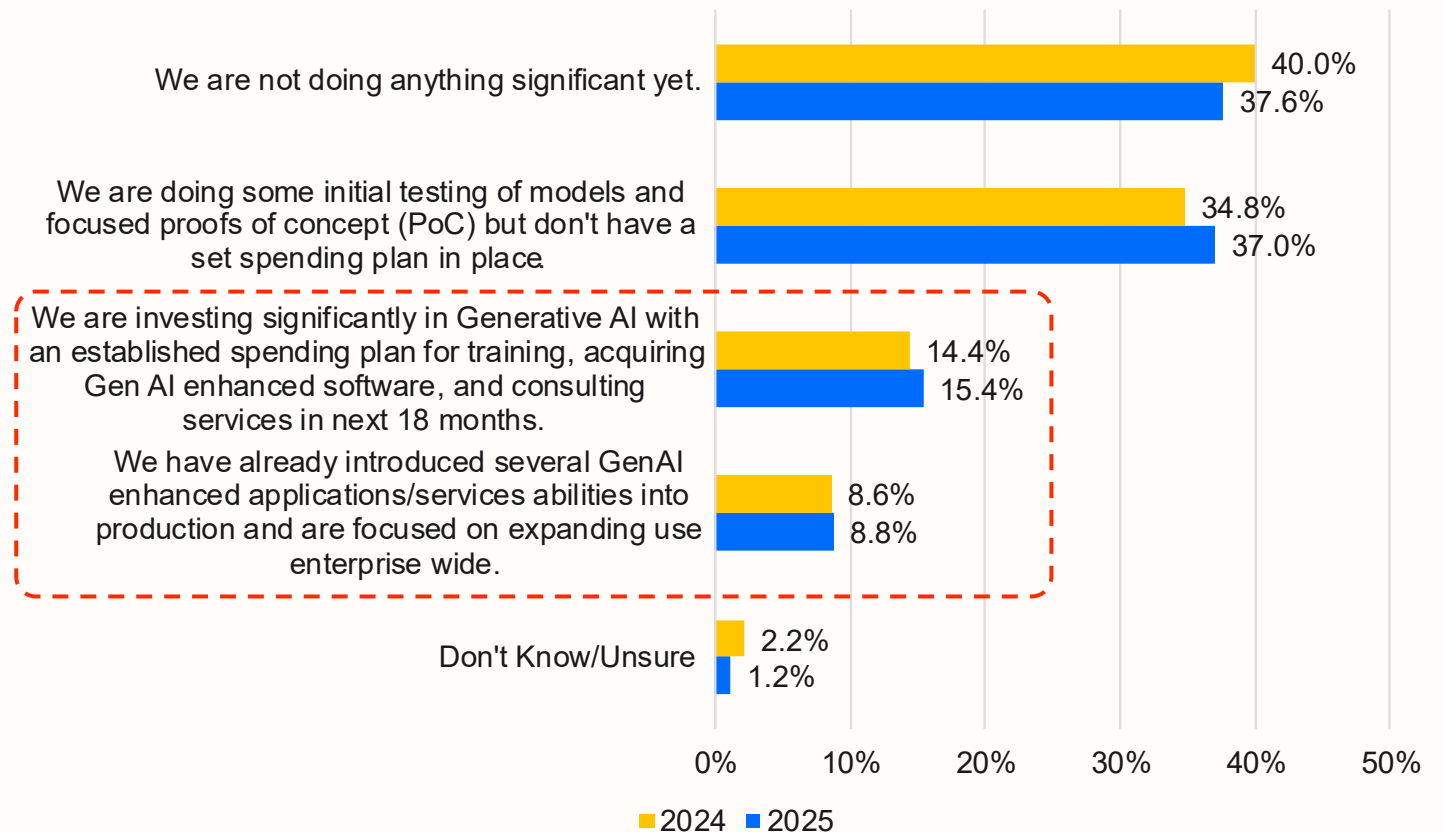


# SMBs are gradually advancing along the GenAI adoption curve, with slow but consistent movement toward structured investment

Inactivity continues to decline while testing expands and both investment and production edge upward, confirming steady but measured progression from evaluation to structured deployment.

- The conversion challenge is operational, not attitudinal, requiring clearer use case alignment and implementation support.
- Despite strong prioritization, enterprisewide production deployment remains limited, revealing a gap between strategic intent and operational scale.

Q. What is your organization's current state of evaluating or using Generative AI (GenAI)?



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

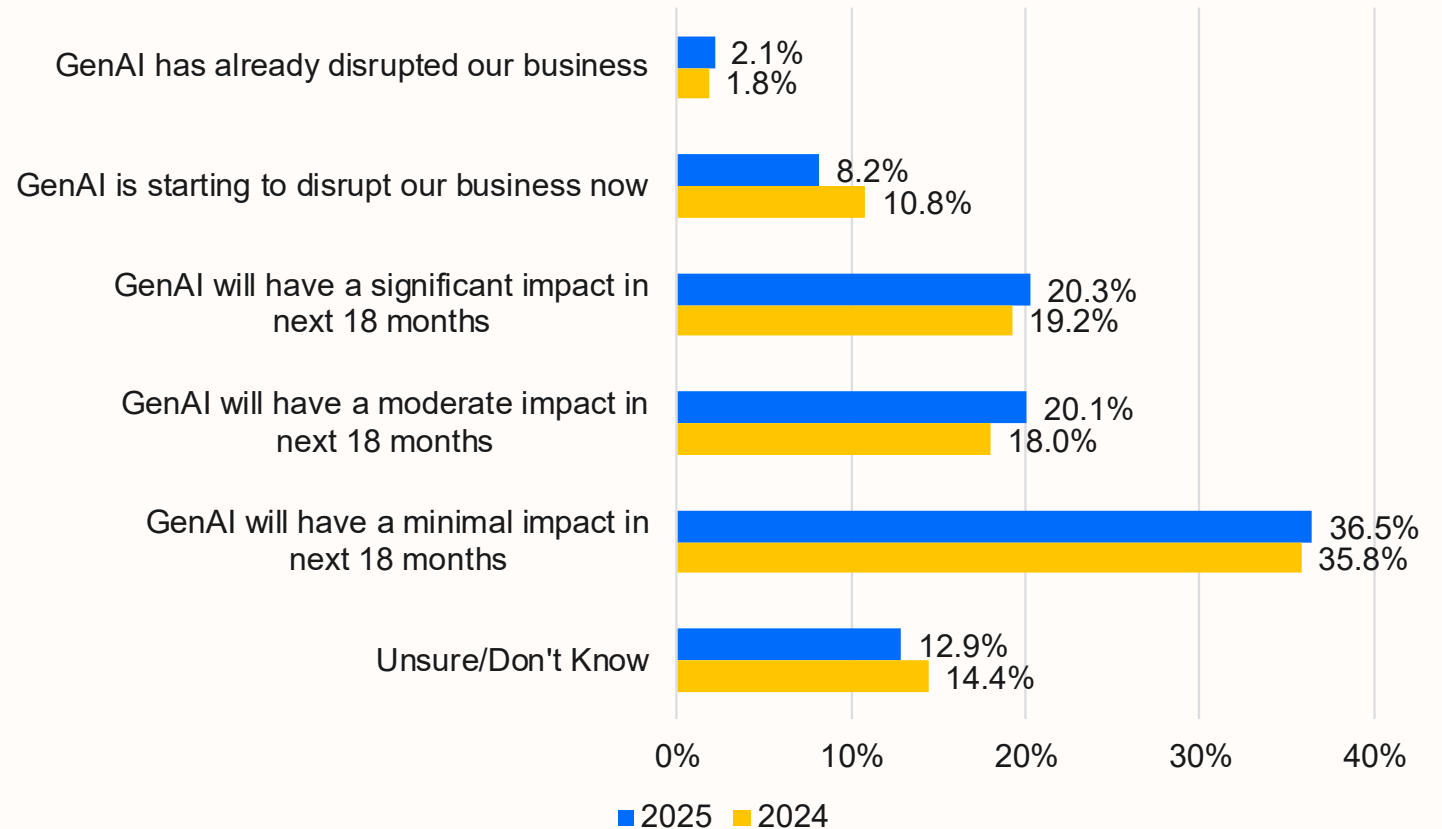


# GenAI is now a competitive market reality, with most SMBs already anticipating measurable impact

More SMBs now expect GenAI to have a moderate or significant impact on their business model, while uncertainty continues to decline, signaling growing conviction around AI's competitive relevance.

- As expectations of competitive disruption increase, decision timelines will compress for SMBs that have not formalized AI strategies.

Q. To what extent do you believe broad access to GenAI foundation models, platforms, and application technologies will disrupt your organization's competitive position or business operating model in the next 18 months?



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

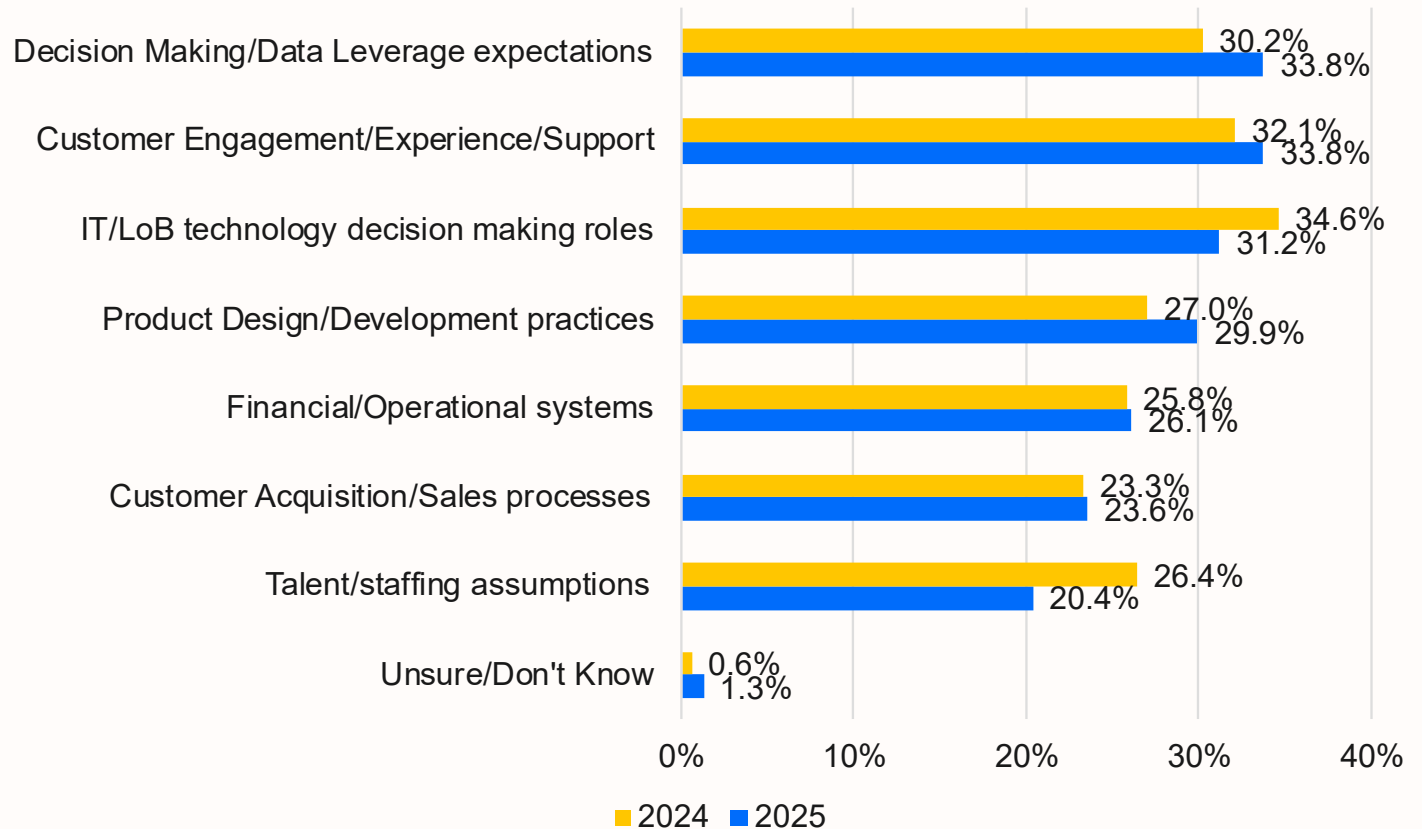


# GenAI's perceived disruption is shifting from internal roles to business performance and customer value

Customer engagement/experience and decision-making/data leverage now rank as the most affected areas, while IT/LOB role disruption and staffing impacts decline, indicating a shift from internal restructuring concerns toward externally oriented growth and competitive positioning.

- The relative decline in staffing concerns, alongside increased emphasis on customer engagement and decision leverage, suggests SMBs are increasingly viewing AI through a growth-oriented lens.
- AI-enabled unified communications and contact center solutions become strategic services to support customer engagement/experience/support functions.
- Providers that attach analytics and decision-support capabilities to connectivity bundles can strengthen strategic relevance and wallet share.

Q. What are the top 2 business areas where you believe the disruptions associated with GenAI technologies are affecting your competitive position or business model?

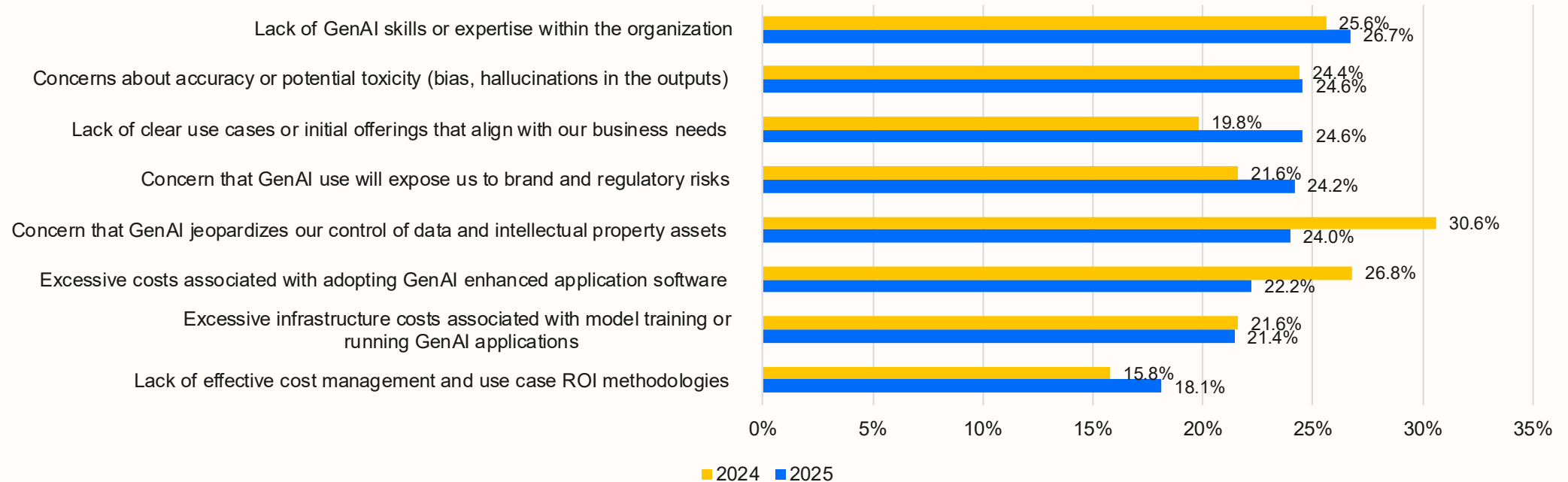


Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 157)



# GenAI barriers are evolving, but SMBs continue to have concerns about their internal capabilities to properly manage AI services, as well as the use cases and ROI to drive investments

Q. What two factors are most significantly limiting further evaluation or expanded use of GenAI in your organization?



Internal resource constraints are the most limiting factor for the expansion of AI in the SMB environment. SMBs are also struggling to understand the relevant use cases and ROI behind AI that will drive increased scale of adoption in this market.

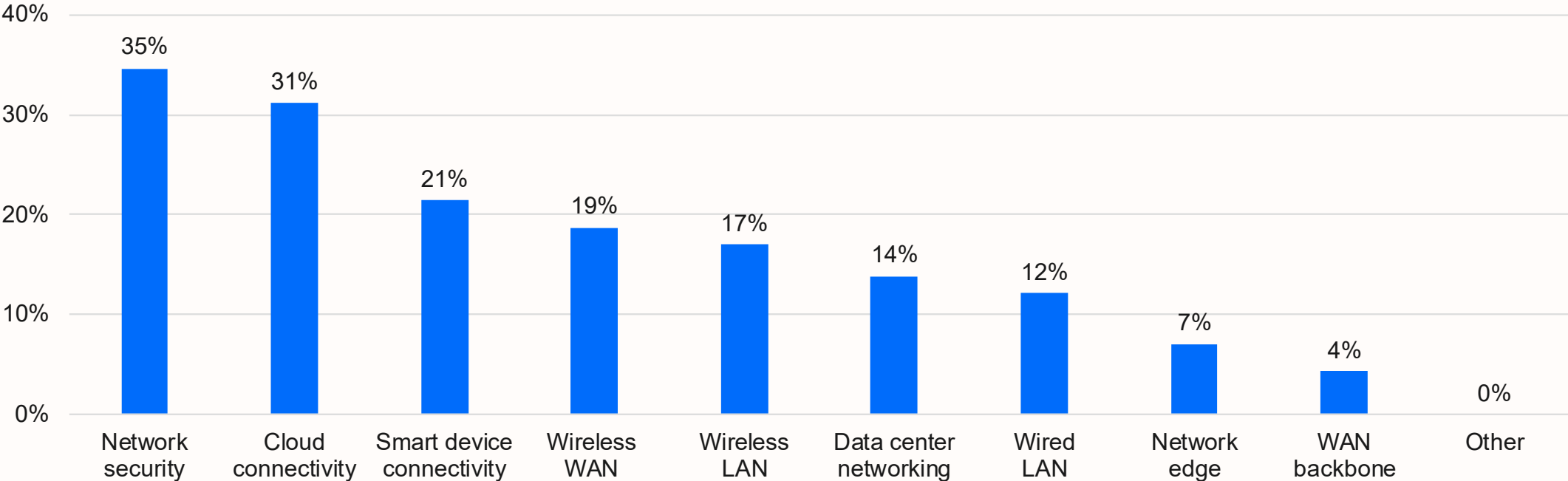
→ Vendors that simplify governance, provide packaged implementation support, and articulate clear ROI frameworks will accelerate movement from testing to scaled deployment.

Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)



# AI-powered networking investments are concentrating where operational risk and cloud reliance are highest, rather than signaling broad infrastructure transformation

Q. Which network domains is your organization currently prioritizing for evaluation and investment in AI-powered networking systems and services?



The concentration in security and cloud connectivity reflects selective risk mitigation and performance optimization rather than broad infrastructure redesign.

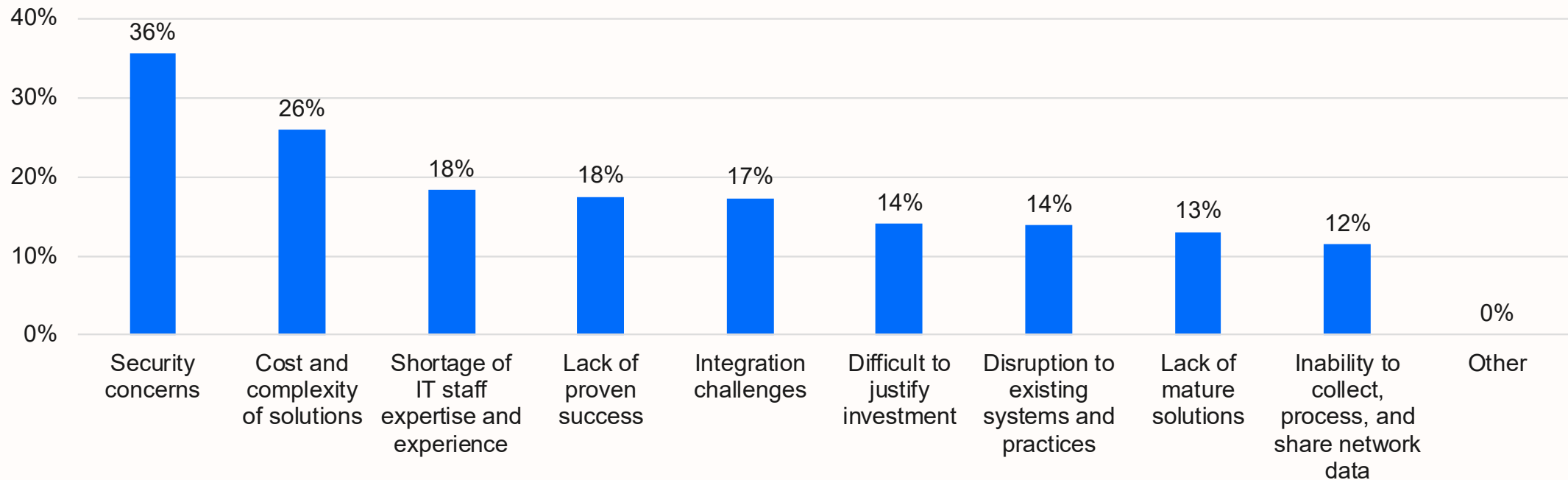
→ The near-term AIOps opportunity centers on secure, cloud-aligned connectivity services, creating monetization potential for providers that bundle AI-driven monitoring, protection, and performance management.

Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)



# Security is both the catalyst and the constraint shaping AI adoption within SMB networks

Q. What are the biggest barriers to success relating to AI support and use across your organization's network infrastructure?



These barriers reflect operational integration complexity within existing network architectures rather than broader governance hesitation.

- AI in networking will scale primarily through managed service models, as SMBs lack the internal expertise to operationalize AIOps independently.
- Vendor selection will increasingly hinge on the ability to embed governance, compliance alignment, and cost predictability into AI-enabled connectivity offerings.

Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

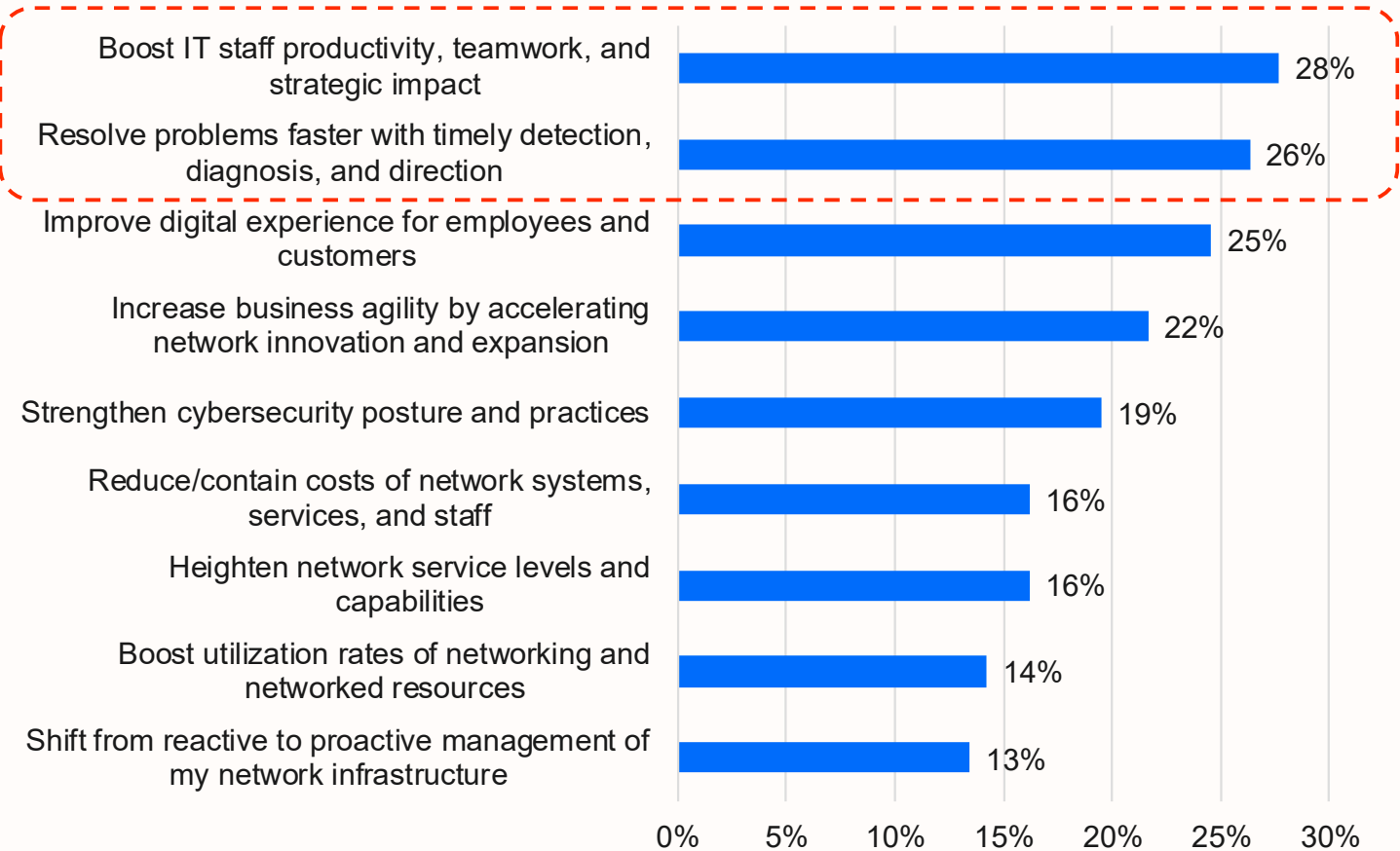


# SMBs expect AI-powered network management to deliver productivity and performance gains more than cost reduction

SMBs are prioritizing productivity gains, faster problem resolution, and improved digital experiences when evaluating AI-powered network management tools, while cost reduction is a secondary consideration rather than a primary objective.

- The prioritization of productivity and performance gains over cost reduction signals a resilience-driven investment mindset rather than a cost-cutting agenda.
- AI-driven network management becomes a strategic enabler of business continuity and employee/customer satisfaction, not merely an IT optimization tool.

Q. What are your organization's expected top 2 benefits of using network management tools that are powered by AI capabilities?



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

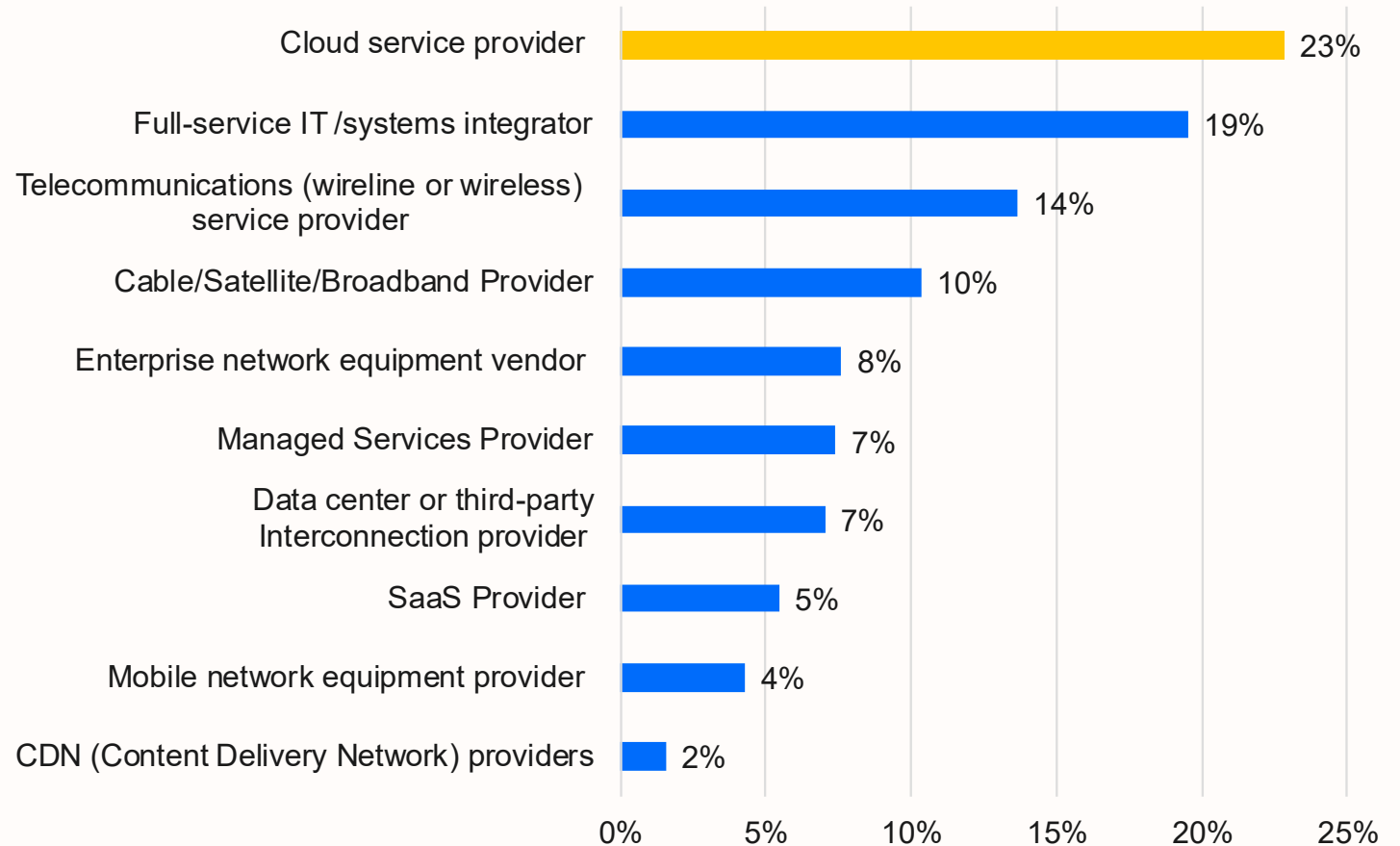


# Cloud providers and integrators are emerging as the primary strategic authorities in SMB AI road maps

Cloud providers and full-service IT/systems integrators lead as the preferred strategic partners for AI/AIOps and connectivity road maps, ahead of traditional telecom and broadband providers.

- Strategic guidance influences architectural standards, which determine long-term service attachment and revenue capture, reinforcing the ecosystem shift toward cloud and integration partners.
- Connectivity providers must expand beyond access services into bundled, managed, and consultative models to remain central to SMB digital transformation decisions.
- Partnerships and co-delivery models will become critical, as no single provider can independently own the full AI, cloud, security, and connectivity stack.

Q. Who do you see as your top partner for providing strategic guidance and input for your road map around AI/AIOps and your connectivity initiatives?



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)





# Analyst insights

AI is emerging as the strategic influence layer within SMB communications services, accelerating demand for secure, managed, cloud-aligned connectivity while shifting road map authority toward ecosystem players that combine AI, integration, and advisory capabilities.

**AI becomes the monetization layer for connectivity:** As core voice revenues decline and data growth remains modest, AI-enabled services represent a structural revenue expansion opportunity within broadband-anchored relationships.

**Managed AI Ops is the near-term execution path:** Given governance constraints and internal skills gaps, SMB adoption is more likely to favor provider-delivered, bundled AI networking and governance models over fully self-managed deployments.

**Ecosystem power is consolidating:** Cloud providers and systems integrators are increasingly guiding AI road maps, influencing architectural standards, and creating disintermediation risk for access-only telecom providers.

**Security and financial governance will shape the next phase:** Embedded security, compliance readiness, and cost predictability will increasingly differentiate vendors and influence long-term AI scaling decisions.



# Related research

Document title	Document number	Publication date
<i>IDC Survey: SMB Communications Services Survey, 2025: Bundled Services</i>	US53066025	January 2026
<i>SMB Communications Services Survey, 2025: Mobility</i>	US53969825	December 2025
<i>SMB Communications Services Survey, 2025: Voice Migration</i>	US53941325	December 2025
<i>Telecommunications for Worldwide SMBs: Key Priorities and Challenges, 2025</i>	US54033325	December 2025
<i>IDC FutureScape: Worldwide Small and Medium-Sized Business 2026 Predictions</i>	US53859525	October 2025
<i>Market Analysis Perspective: U.S. Small and Medium-Sized Business Communications Services, 2025</i>	US53066125	October 2025
<i>U.S. SMB Communications Services Forecast, 2025–2029</i>	US52240425	June 2025



# Primary analyst



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# Appendix

## Methodology

- Field time: September 2025
- Survey sample:

Country	1-99 employees	100-499 employees	Total
United States	309	204	513

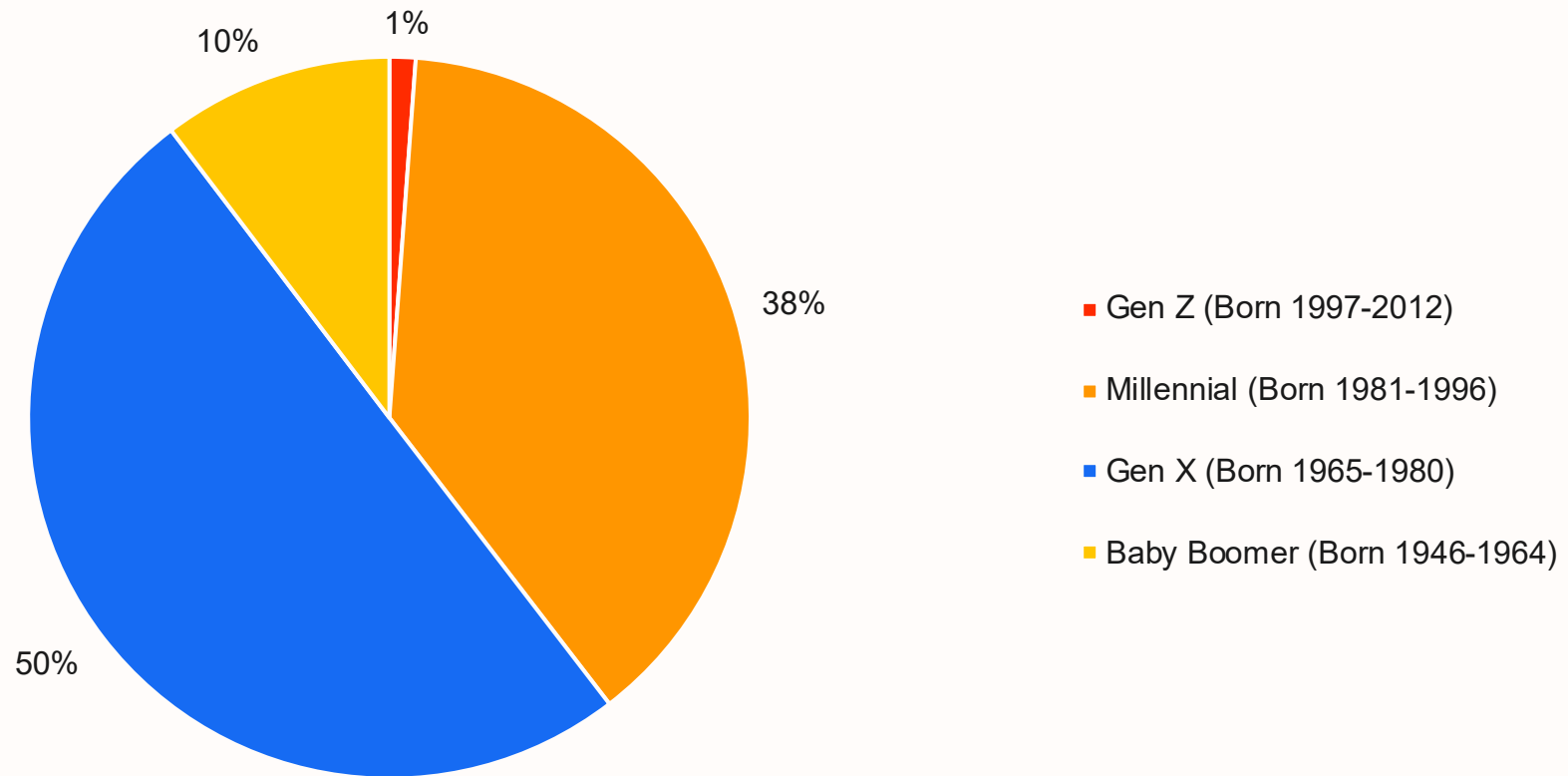
- Method: Web
- Screener requirements
  - Involved in IT and telecom decisions
  - Subscribe to internet services
  - Subscribe to telephony services
  - SMB = 1-499 employees



# Appendix

## Demographics or firmographics

Q. Which of the following best describes the approximate age of the individual that makes most of your communications and/or IT purchasing decisions?



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)



# Appendix

## Demographics or firmographics

Q. Please describe your involvement with your company's IT and Telecommunications decisions.



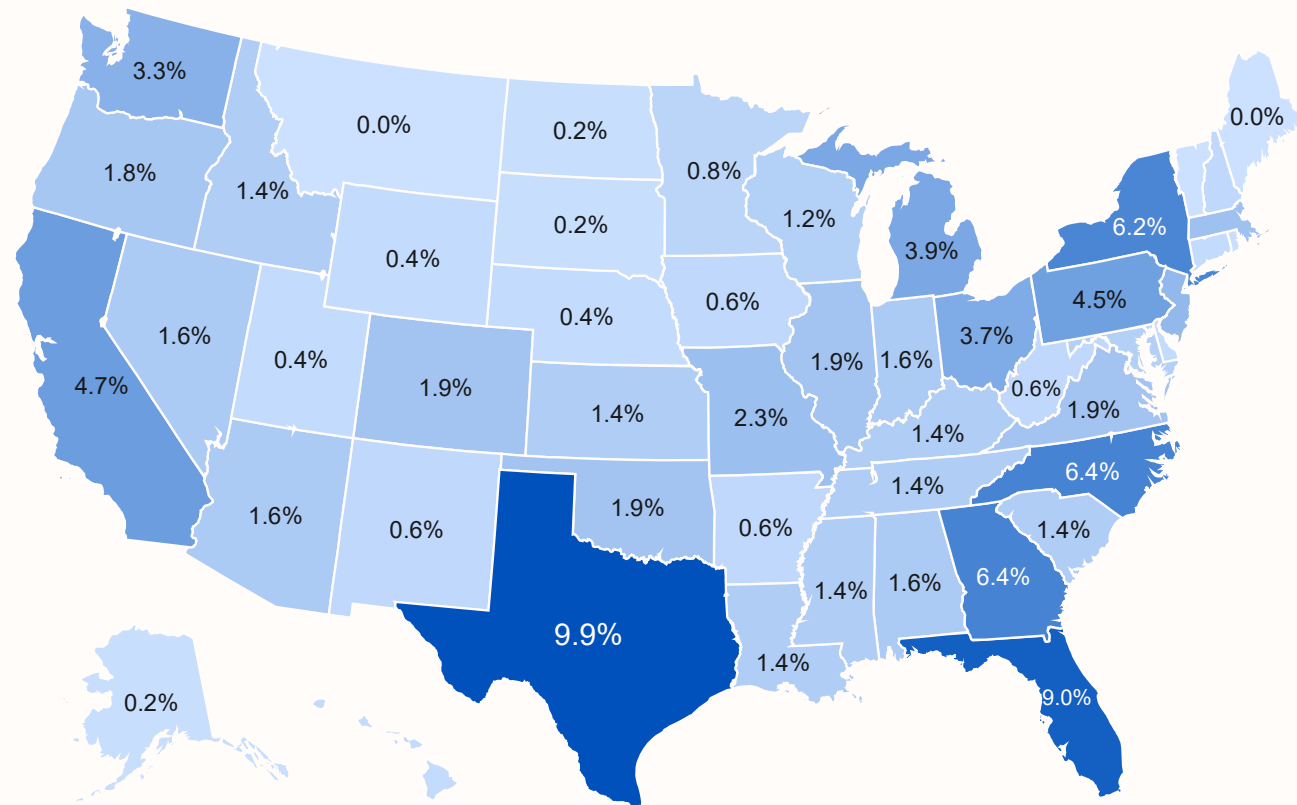
Source: IDC's *SMB Communication Services Survey 2025*, September 2025 (n = 513)



# Appendix

## Demographics or firmographics

Q. What state is your business located in?



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Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

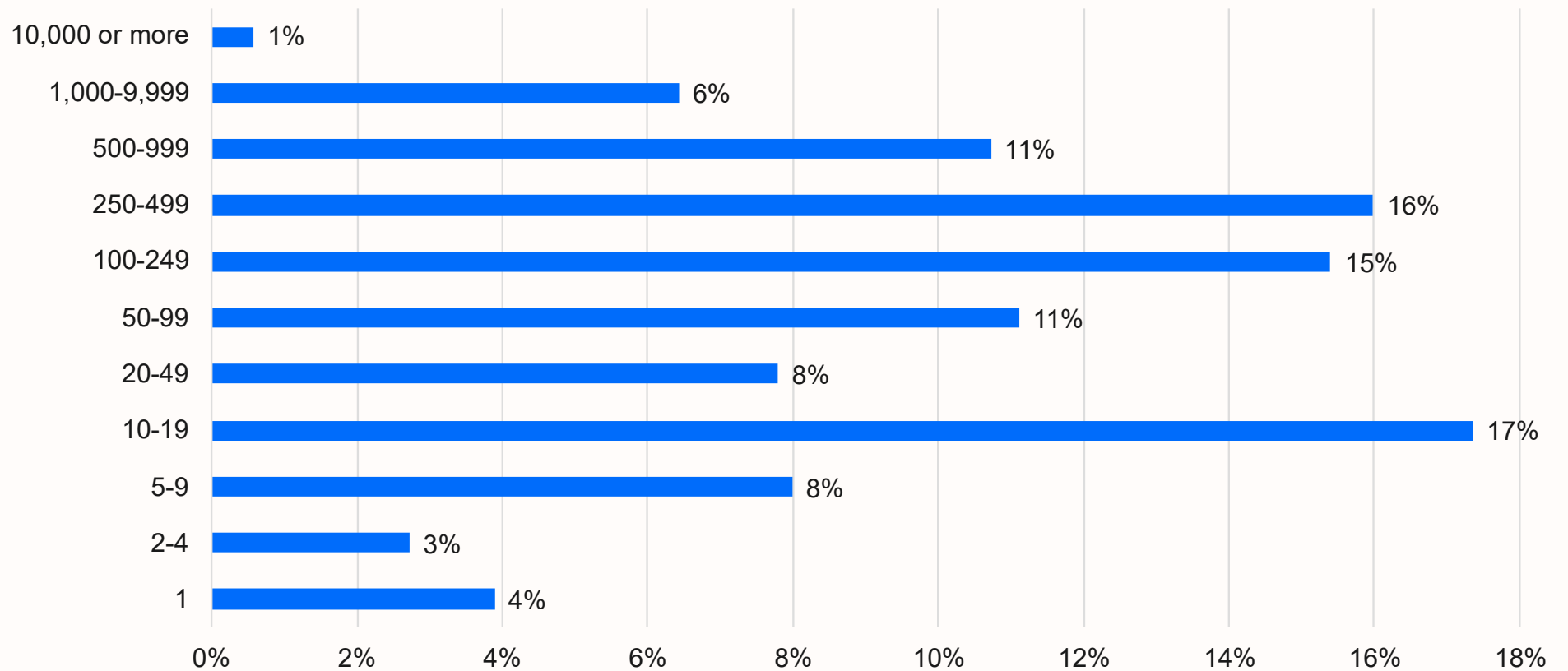
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# Appendix

## Demographics or firmographics

Q. Please estimate the total number of employees in all your company's U.S. locations.



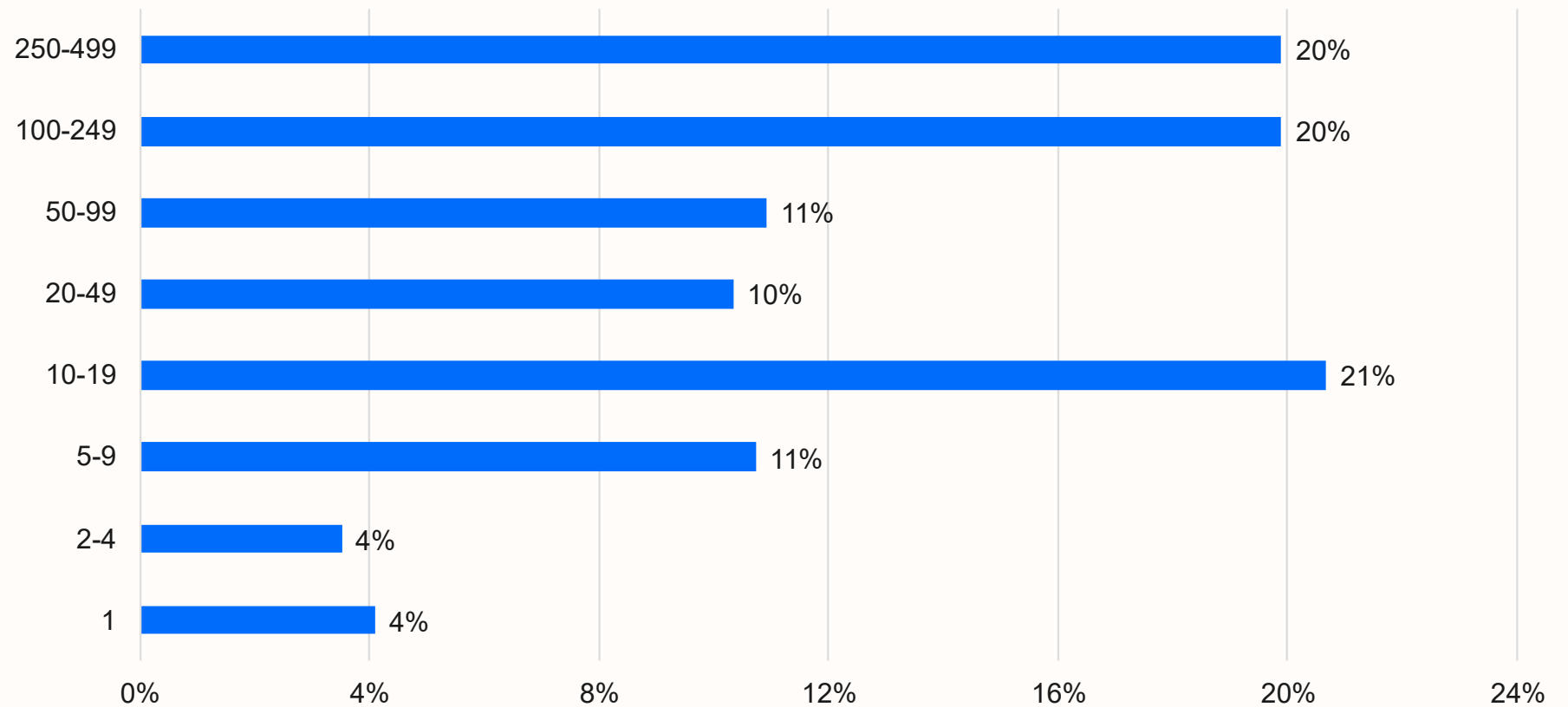
Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)



# Appendix

## Demographics or firmographics

Q. How many employees work at your business location?



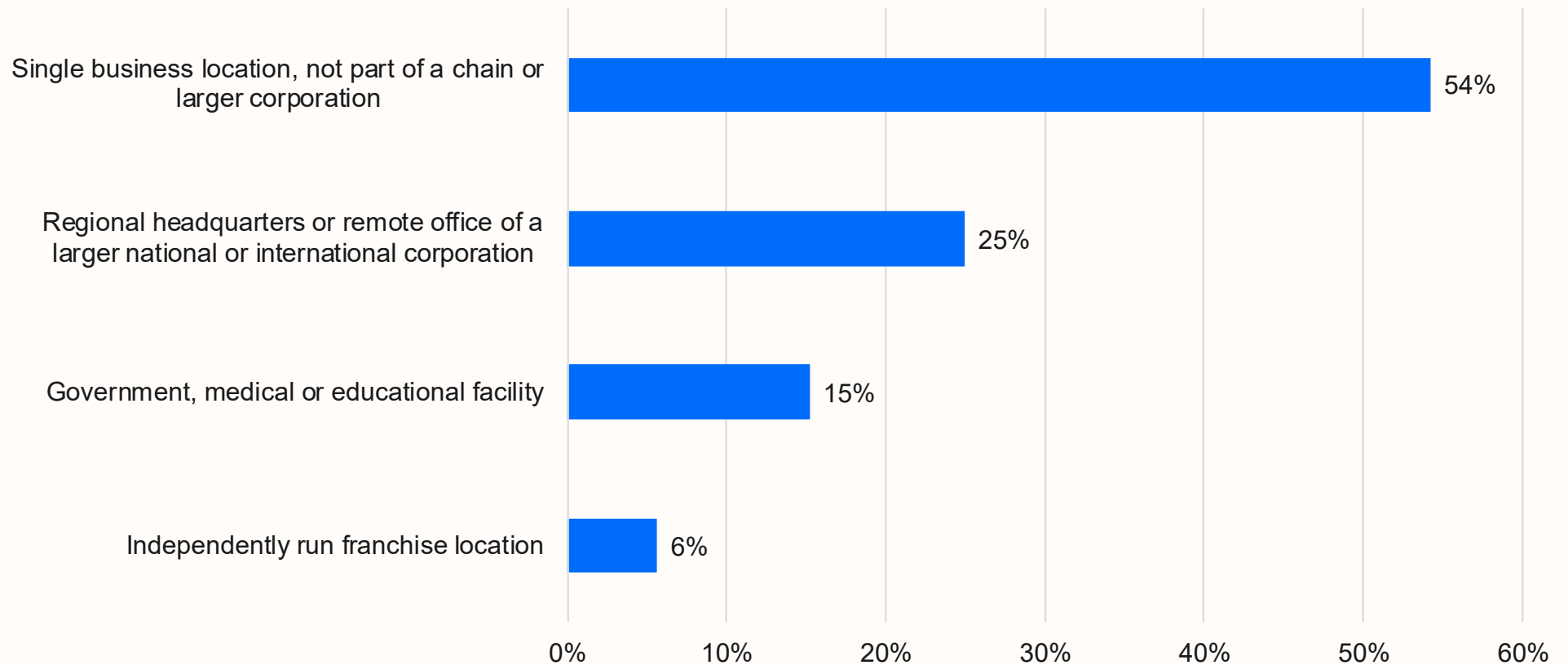
Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)



# Appendix

## Demographics or firmographics

Q. Please identify the type of establishment that best describes your company.



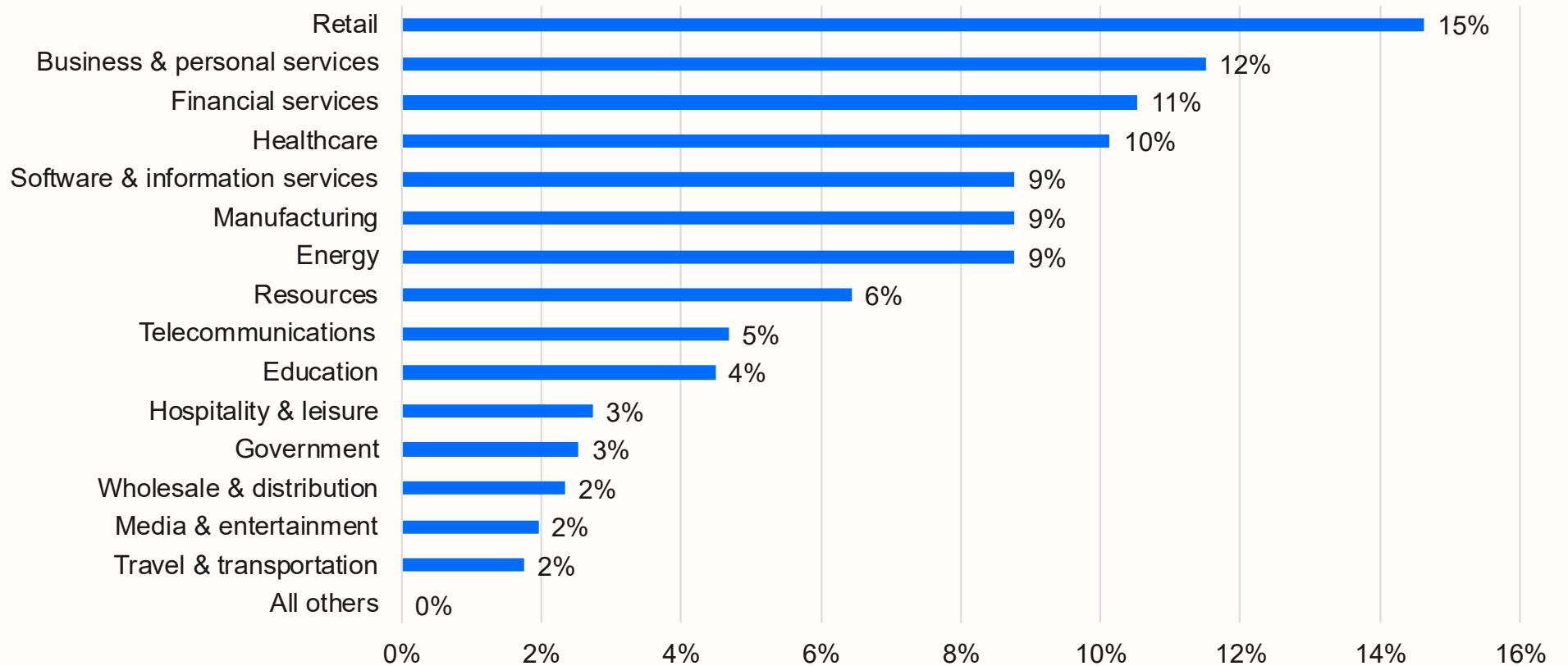
Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)



# Appendix

## Demographics or firmographics

Q. Which of the following industry classifications best represents the principal business activity of your organization? In the case of multiple activities, choose the one that generates the highest revenue.



Source: IDC's *SMB Communication Services Survey*, September 2025 (n = 513)

