



2026 UCaaS Feature Adoption Benchmark Report

Ranking Feature Adoption Trends by Service Provider Size

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Executive Summary

If you're a service provider, you don't want to be eliminated from a major customer contract simply because you lack UCaaS features that other vendors have made essential. This report analyzes how service providers across revenue segments are adopting critical capabilities in resiliency, security, mobility, messaging, and AI-driven productivity – and what the gaps mean for your competitive position.

Our analysis reveals three realities shaping the landscape:

The UCaaS market remains fragmented.

Even baseline capabilities such as SIP trunking, high availability (HA), voicemail transcription, and business texting are present at only 40% of providers overall – likely due to architectural constraints in BroadWorks, Metaswitch, FreeSWITCH, and NetSapiens that make it difficult to integrate new features.

A clear divide exists between smaller and larger providers. Providers with over \$100M in revenue consistently offer more advanced features, particularly in security, analytics, mobility, and compliance. For smaller providers pursuing enterprise contracts, this gap creates an immediate risk of elimination during customer evaluation.

AI, mobile integration, and automated compliance are the next battleground.

Features like AI call summaries, automatic E911 updates, and eSIM mobile integration show low adoption rates today but strong roadmap momentum across the industry.

For service providers, these trends highlight a clear imperative: expanding feature coverage is critical to remaining competitive.

Methodology

This report analyzes UCaaS service providers and related communications platforms across multiple revenue segments.

Providers were grouped into three categories:

- **Under \$10M annual revenue**
- **\$10M–\$100M annual revenue**
- **Over \$100M annual revenue**

We evaluated each provider based on whether they offer specific capabilities within their UCaaS or contact center portfolio, using information gathered from each provider's website on December 29, 2025.

Features were selected based on strategic importance, customer demand, and emerging industry trends, including:

- **Network resiliency**
- **Messaging and omnichannel communication**
- **Security and encryption**
- **Mobile integration**
- **AI-driven productivity**
- **Regulatory compliance and safety**

A provider was credited with a capability if it was available anywhere within their portfolio, including integrations or partner-delivered functionality.

Market Overview: Feature Adoption

Across the UCaaS landscape, adoption of most advanced capabilities remains below 50%. The features that stand out as the most widely adopted are:

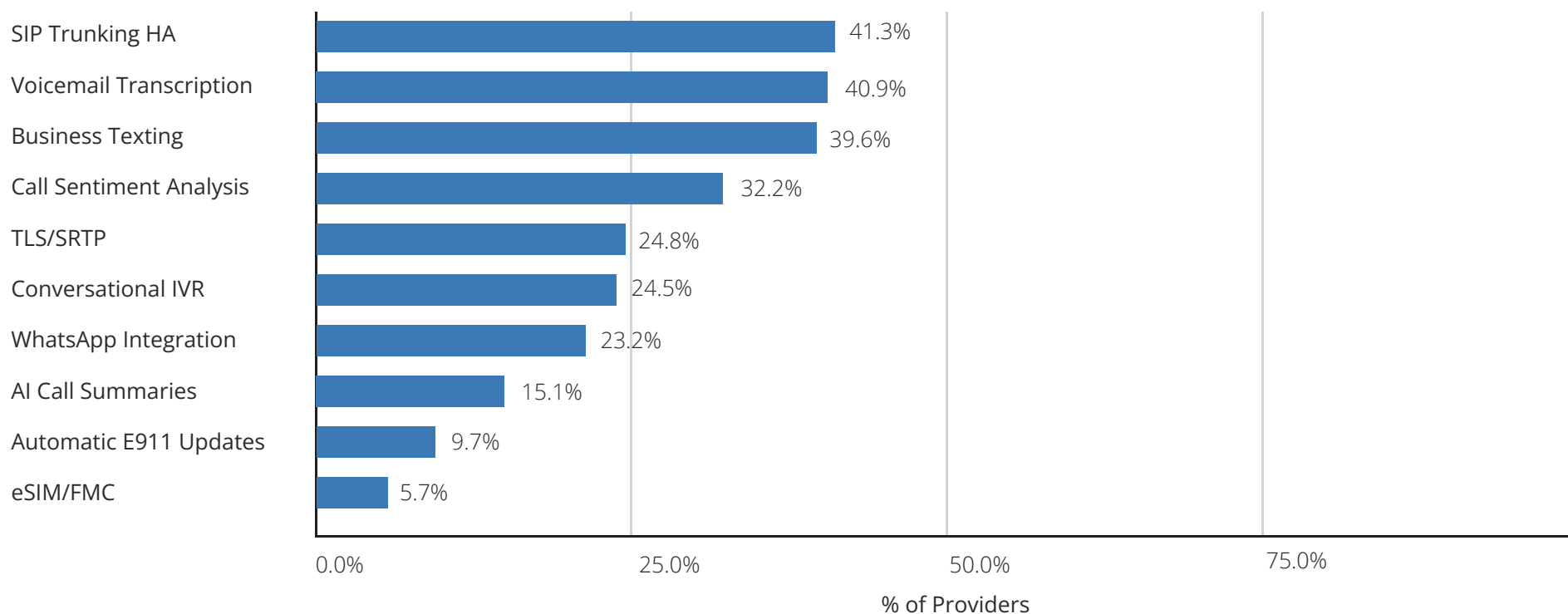
- SIP Trunking HA: 41.3%
- Voicemail transcription: 40.9%
- Business texting: 39.6%

These capabilities represent the baseline for competitive UCaaS offerings. Lacking any one of these creates the impression of an outdated platform during customer evaluation. For providers without these capabilities, implementation should be an immediate priority.

However, even these features are far from universal. A significant percentage of providers still lack basic resiliency, productivity, or messaging functionality.

This fragmentation is a direct reflection of the engineering effort required to integrate newer capabilities into platforms such as BroadWorks, Metaswitch, FreeSWITCH, NetSapiens, and others.

Overall Adoption of Modern Communications Features



Capability Gap by Company Size

Large providers demonstrate higher adoption across nearly every capability measured, reflecting both greater engineering resources and stronger pressure to meet enterprise requirements.

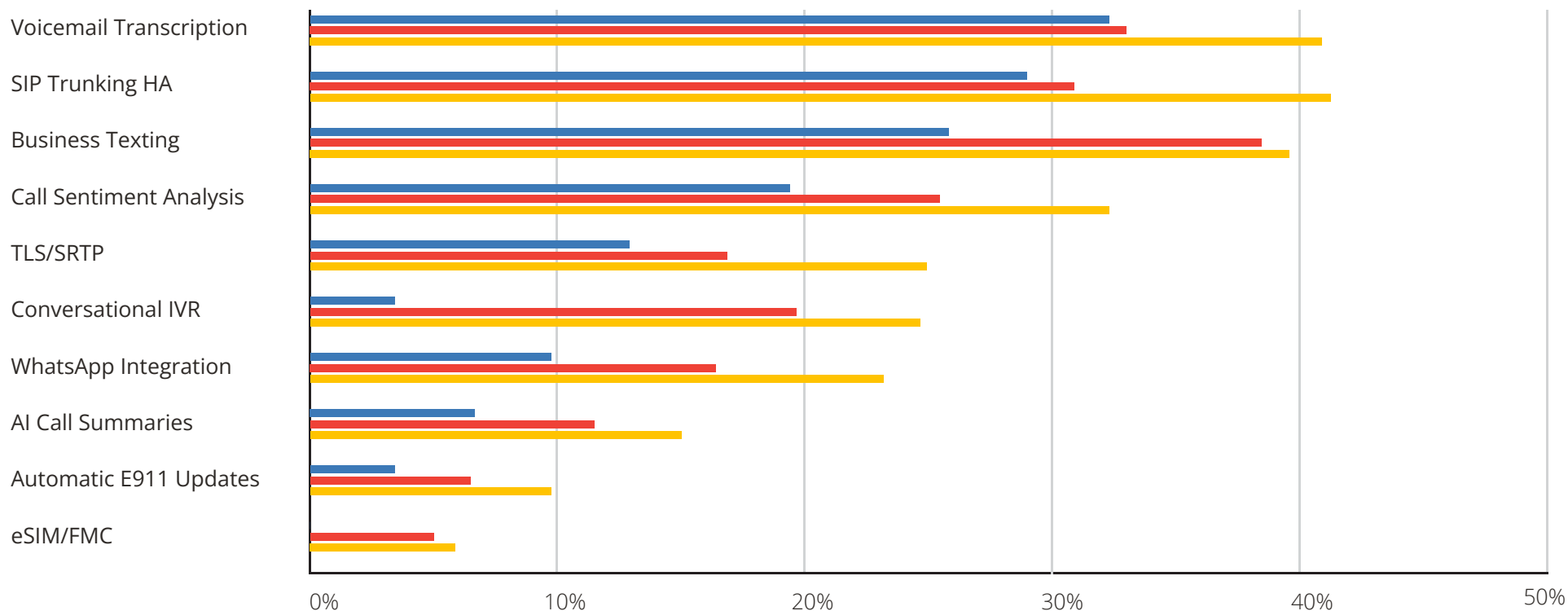
Among the baseline capabilities, providers that generate more than \$100M annually achieve substantially higher adoption than those generating less than \$10M.

- SIP Trunking HA: 41.3% vs. 29.0%
- Voicemail transcription: 40.9% vs. 32.3%
- Business texting: 39.6% vs. 25.8%

These numbers tell us that smaller providers are systematically missing baseline expectations. A mid-market customer evaluating providers will encounter larger competitors offering these features as standard, while their absence at a smaller competitor signals operational immaturity.

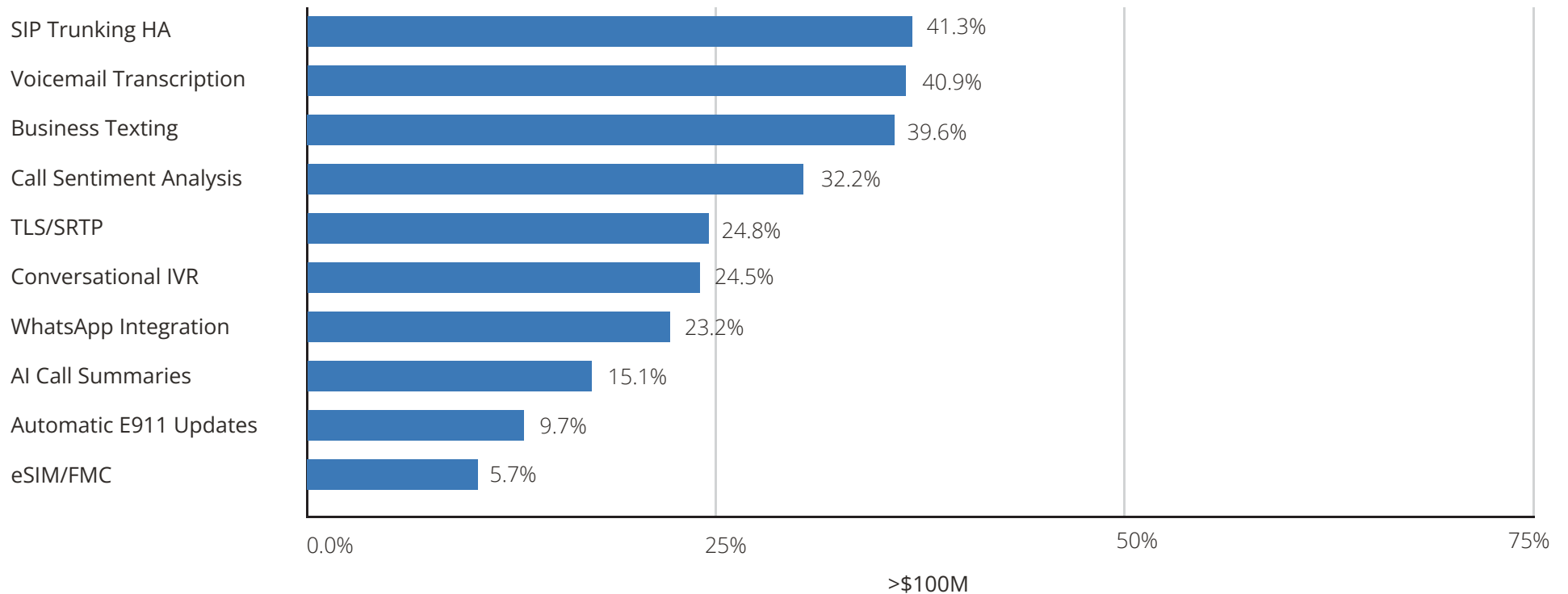
Feature Adoption by Company Size

■ <\$10M ■ \$10M - \$100M ■ >\$100M



Capability Gap by Company Size: >\$100M

Feature Adoption of Companies > \$100M



Larger providers have achieved broad adoption across both baseline and advanced capabilities that define enterprise-grade offerings, including:

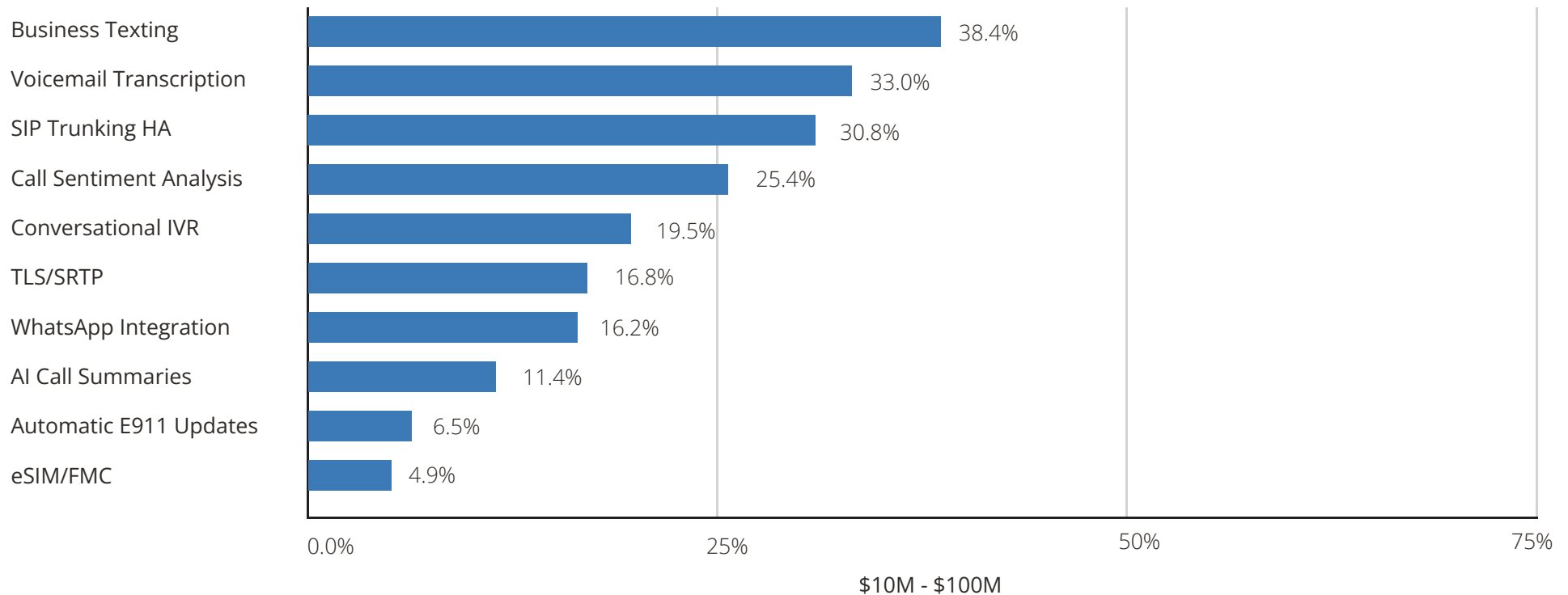
- Call sentiment analysis: 32.2%
- Conversational IVR: 24.5%
- TLS/SRTP encryption: 24.8%
- AI call summaries: 15.1%

Enterprise customers expect this breadth, and larger providers deliver it. They have the engineering resources to build integrations and the customer base to justify the investment.

Major providers have real advantages: they're often pre-approved vendors because they've cleared approval bars, like SOC 2 Type II, ISO 27001, PCI. So when they add new features, the barrier to revenue is lower to add to their existing customer base.

Capability Gap by Company Size: \$10M–\$100M

Feature Adoption of Companies \$10M - \$100M



Mid-market providers show variable progress. On baseline capabilities, they lag behind large providers but remain competitive. Their advanced capabilities show selective strength, particularly in conversational IVR.

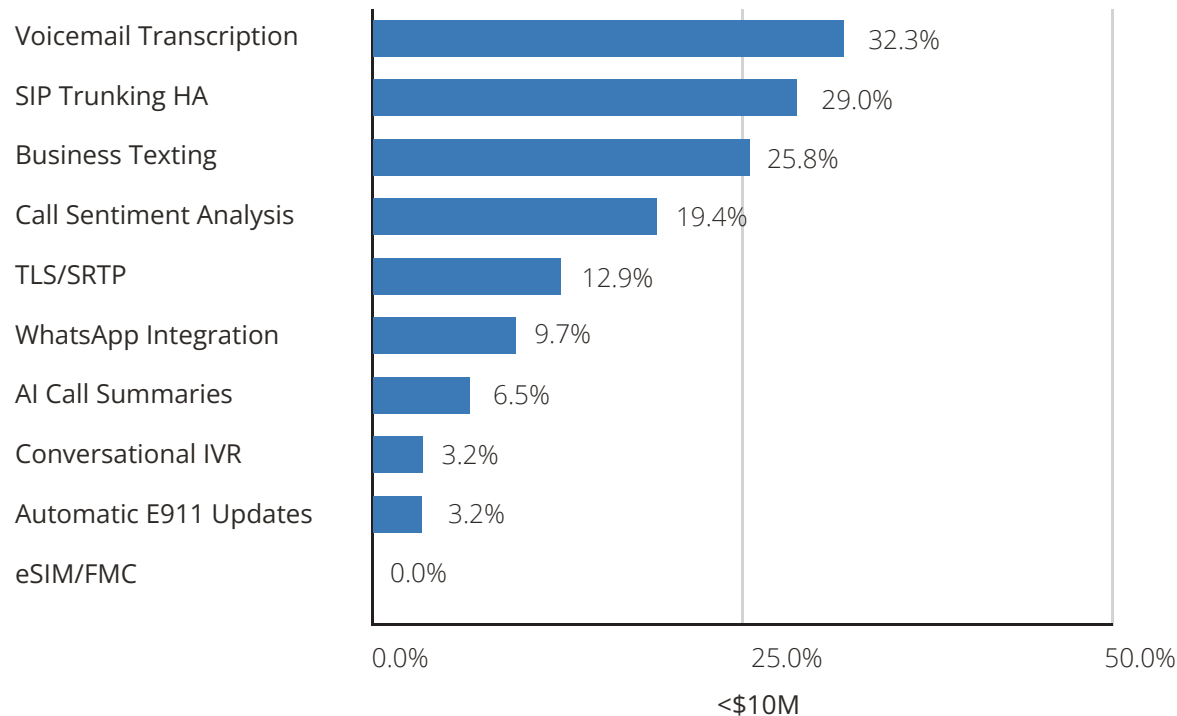
The mid-market tier faces different challenges than either large or small firms. They may have hundreds of employees and resellers and a large installed base generating consistent recurring revenue — but that scale creates a coordination tax. Rolling out new features requires far more cross-team alignment than it did at smaller scale. These providers are often the product of multiple acquisitions, so they lack both the unified single platform that smaller providers benefit from

and the wholly-owned proprietary voice stack that the largest providers operate.

Mid-sized providers also have to work through the technical debt accumulated when they were small. A Perl script for processing billing worked at \$5M; at \$50M, it's a serious liability that demands real engineering investment to replace. Adding features now requires coordination across multiple vendors and formal project management, but is necessary to win the deals and respond to RFPs in a competitive way.

Capability Gap by Company Size: <\$10M

Feature Adoption of Companies <\$10M



Smaller cloud communication providers, often with 20,000 subscribers or fewer, are substantially different than the major providers. Some features, like eSIM/FMC support, seem to be nonexistent in the smallest providers. Others, like conversational IVR, are vastly underrepresented.

Small providers often take a strategy of “we’ll build it for you.” With a nimble and knowledgeable staff they can get a customer request on Tuesday and start testing Friday. They often bring a vertical depth, such as deep integration with enterprise software their clients use. But they may struggle to productize new features - like those listed here - meaning they can respond better to custom Individual-Case-Basis One-Offs than they can build a nationally-competitive product offering that services all client types.

Feature Adoption Maturity Model

UCaaS capabilities can be grouped into three tiers:

- **Tier 1: Table Stakes**
- **Tier 2: Enterprise Readiness**
- **Tier 3: Emerging Differentiators**

Providers at all revenue levels have clear opportunities to strengthen competitive positioning, but must ensure Tier 1 coverage before focusing on differentiation.

Features Breakdown: Table Stakes

Table Stakes

These capabilities form the foundation of modern UCaaS offerings. Providers lacking these features may struggle to compete effectively.



SIP Trunking High Availability

Network failures are expensive: research shows outages can cost at least \$137 per minute.¹ SIP trunking HA enables redundancy across network paths or customer locations, so that businesses – particularly SMBs – using SIP can develop a disaster recovery plan. Most large service providers already offer this capability, so buyers may view providers that don't have it as unable to meet enterprise reliability expectations.



Voicemail Transcription

Voicemail transcription converts voice messages into readable text, improving productivity and accessibility. This feature is now a key driver of UC adoption, and new buyers expect it. Its absence signals operational friction that competitors have already eliminated.



Business Texting

Business texting is a powerful customer engagement tool, with **44% of small businesses reporting sales improvements when connecting with clients through texting.²** It's a relatively easy feature to implement via integrations with third-party messaging providers, so adoption rates are relatively high across providers of all sizes.

1. <https://wifitalents.com/disaster-recovery-industry-statistics>

2. <https://d7networks.com/blog/whatsapp-business-statistics>

Features Breakdown: Enterprise Readiness

Enterprise Readiness

These features impact a provider's ability to compete for enterprise customers, separating table stakes from real differentiation.



TLS and SRTP Encryption

Transport Layer Security (TLS) and Secure Real-time Transport Protocol (SRTP) encrypt call signaling and audio across the internet. Voice network attacks are most commonly directed at companies without encryption, but **companies see a 35% drop in successful attacks when they prioritize security tools.**³ As a result, organizations in regulated verticals like healthcare, finance, and government contracting cannot buy from providers lacking comprehensive encryption.



Call Sentiment Analysis

Call sentiment analysis uses AI to evaluate whether conversations were positive, negative, or neutral. It's commonly associated with contact center platforms but is increasingly appearing in broader UCaaS environments, signalling a shift toward analytics-driven communications. Providers offering sentiment analysis demonstrate a higher level of platform maturity.



Conversational IVR

Conversational IVR uses AI voice agents to automate customer interactions. Unlike core network capabilities, conversational IVR can often be added through integrations without requiring major infrastructure changes. This makes it an accessible way for providers to expand functionality and improve automation.

3. <https://www.cellcrypt.com/post/voip-voip-security-2025-definitive-guide>

Features Breakdown: Emerging Differentiators

Emerging Differentiators

These capabilities show lower adoption today but strong long-term importance – and clear pathways for implementation.



AI Call Summaries

AI call summaries automatically generate notes from conversations, improving productivity by allowing users to quickly review key points from calls. Solutions like ECG's Wingman bring AI summaries to regular UCaaS calls with CRM integration, support ticketing, and team workflows – turning conversations into actionable insights rather than passive transcripts.



Automatic E911 Updates

Automatic E911 updates ensure accurate emergency location information when users move between locations. The easiest path to implementation is eSIM integration, which allows voice providers to exit emergency calling management while the wireless provider (MNO) provides GPS and tower-assist location sensing.



eSIM and Mobile Integration

UC is rapidly moving away from desk phones – **New York Life's CTO, Kevin Glynn, said in 2025 that he expects physical phones to be on the way out.**⁴ eSIM-attached Fixed-Mobile Convergence (FMC) allows providers to offer phone service through mobile carrier infrastructure, so users can access UCaaS capabilities without relying on desk phones. Adoption at smaller providers is still low, but those who fail to provide eSIM risk being displaced entirely.



WhatsApp Integration

WhatsApp integration enables messaging and calling through one of the world's most widely used communication platforms. Some providers enable SIP-to-WhatsApp calling connectivity, supporting omnichannel communication and international connectivity. Currently, adoption is relatively low but is expected to grow significantly.

4. <https://www.wsj.com/articles/why-the-business-world-cant-let-go-of-landline-phones-9dde6306>



Next Steps

While fragmentation across the UCaaS market remains, the path forward is clear: service providers that proactively expand their feature portfolios will be positioned to compete for larger customers and emerging opportunities.

For small and mid-market providers, the barrier to entry is lower than it appears. Many high-impact improvements can be achieved through integration partnerships rather than by rebuilding the platform from scratch. Providers who act now still have a chance to differentiate themselves before feature parity becomes the standard.

See How Your Platform Compares

ECG offers custom benchmarking assessments to help service providers understand their competitive position and identify the highest-impact opportunities for improvement.

Request a benchmark assessment today to get a detailed analysis of your feature portfolio relative to providers in your segment and revenue category.

BOOK YOUR ASSESSMENT

About ECG

ECG helps service providers, government agencies, and large enterprises build and optimize global voice and data networks. With over two decades of proven expertise in network engineering, ECG combines technical consulting with industry-leading software like Wingman, Alpaca, and CallReporter to identify competitive gaps and accelerate feature adoption.

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