

Segments in the Enterprise Mobility Market: Who they are, how they behave, and why they buy

Executive Summary

This report shows the reader how to segment the market for enterprise mobility. We define enterprise mobility in the context of the way that people in enterprises accomplish or would like to accomplish their work. The exploitation of communications and information technologies are rendering the office for many contemporary workers to be a logical concept as opposed to a physical site.

The segmentation approach that we apply is benefit segmentation. This method of organizing disparate groups of users and potential users in the enterprise market begins by asking: what are the distinct reasons why a user would select an alternative from a pool of technology alternative product technologies?

We have built our benefit segmentation scheme of the enterprise mobility market from analysis of data we have collected from over 300 observations of real users and decision-makers in the enterprise environment. There are nine distinct benefit segments—or stereotypical users—in three sub-markets: the general diffuse market, the extended office market, and the specialized processes market. These sub-markets vary in terms of richness of information demands, the importance and urgency of access to data, and comfort of the transactional session. The segments illustrate distinctive trade-offs that different users make in their desires to exploit data remotely. The segments satisfy the necessary conditions of any good segmentation scheme: they are identifiable, reachable, and sizeable.

We have described the segments to help product technology vendors fine-tune their offerings to the target markets they seek to satisfy. Such fine-tuning is significant in blunting the tendency of technology developers to over-engineer offerings and, thereby, impose avoidable development and marketing costs on their companies.

Who should read this report

This report has been prepared especially for the product development, marketing, and sales managers of vendors of product technologies that purport to enable the worker to become more mobile. Such technologies may be equipment, services, or software for application by end users, by IT staff within enterprise infrastructure, or by public networks that serve enterprise customers. The report also serves the interests of investment analysts who track developments in wireless, mobile computing, and information technology industries. In strikingly clear terms, the benefit segmentation that we describe in this report assists executives in companies that bring product technologies to market and to the analysts who must critique the prospects for future cash flows of these firms.

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CCG Group was founded in 2003 by Melissa Cantrelle, Dr. Mary Ellen Cremer, and Dr. David Gautschi. The group includes over 35 affiliate members from industry and academe in the United States and Europe.

Known for exceptionally rigorous analyses of markets of emergent technologies and trenchant interpretations of management imperatives, we pursue our mission passionately:

**To improve radically how enterprise technology
is marketed, selected, and used.**

CCG Group blends primary and secondary data collection and analysis to inform perspectives on emerging markets. Through use of an expansive expert affiliate network, CCG Group primary data response rates have exceeded 90%, a level previously unheard of in the market research industry.

CCG Group clients include carriers, equipment manufacturers, software providers, adopting enterprises, executive education programs, and systems integrators.

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