

Market Demand for Enterprise Mobility: The Real Wi-Fi Story

Overview

This report synthesizes perspectives of demand for enterprise mobility solutions to support wise investment decisions for product development, on the one hand, and technology adoption, on the other. We structure the report to help you answer these key questions about enterprise mobility demand:

- **What are the demand predictions for the enterprise mobility market?**
Key finding: Positive analyst reports predict growth in sales of Wi-Fi equipment through 2007 and a rise in end user demand as well.
- **How are these predictions supported?**
Key finding: The millions of business travelers who carry laptops will likely increase usage of Wi-Fi services as supply increases.
- **How do these predictions conflict?**
Key finding: Analysts' predictions, while uniformly positive, vary widely in their timelines and rates for growth.
- **What types of users are most likely to adopt enterprise mobility solutions now?**
Key finding: Mobile professionals often provide an industry focus. CCG Group, however, identifies three sub-markets that help to vet user targets that need Wi-Fi. The three include: 1) general diffuse enterprise, 2) extended office and 3) specialized user activity.
- **What applications do enterprise mobility users need?**
Key finding: No single application currently supplies the complete solution to a user segment's needs. Opportunity abounds for technology vendors to collaborate and innovate to serve users' business needs more appropriately.
- **What technology solutions are most suitable for user segments?**
Key finding: Wi-Fi and cellular technologies do not necessarily compete in every enterprise mobility sub-market. Differences in user requirements for data transfer intensity and ubiquity of coverage uncover competitive advantages and collaboration opportunities for wireless solutions.

For each question we review the results of our analysis and discuss the CCG Group opinion. The demand appendix provides excerpts from the data sources and other supporting information we used in conducting our analysis.

Price

Individual License \$500; Company-wide license \$1500. Bundling options available. For information please contact ccggroup@ccggroup.net

Contents	
Table of Figures	1
Overview	2
Preface: Mapping Enterprise Mobility	3
What are the demand predictions for enterprise mobility?	4
How are these predictions supported?	9
How do these predictions conflict?	11
What types of users are most likely to adopt enterprise mobility solutions now?	15
What applications do enterprise mobility users need?	19
What technology solutions are most suitable for user segments?	21
Appendix	24
Demand predictions	24
User types	28
Application types	31
Vertical application overview	32
Technology for each sub-market	37
About CCG Group LLC	40
The CCG Group Enterprise Mobility Report Series	41

Table of Figures	
Figure 1: Map of Enterprise Mobility Technology Solutions	3
Figure 2: WLAN Equipment Revenues	5
Figure 3: WLAN Penetration of Broadband Subscribers	5
Figure 4: Comparison of Hotspot Location Growth Predictions	6
Figure 5: Comparison of Hotspot User Predictions	7
Figure 6: Hotspot Revenues per User	8
Figure 4: (revisited): Comparison of Hotspot Location Growth Predictions	9
Figure 4: (revisited): Comparison of Hotspot Location Growth Predictions	12
Figure 5: (revisited) Comparison of Hotspot User Predictions	12
Figure 2: (revisited) WLAN Equipment Revenues	13
Figure 3: (revisited) WLAN Penetration of Broadband Subscribers	14
Figure 8: Mobility Taxonomy	17
Figure 9: Sub-markets & User Segmentation	18
Figure 10: sub-markets with Associated Applications	20
Figure 11: Sub-markets with Associated Technology Choices	21

About CCG Group, LLC

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.

The CCG Group Enterprise Mobility Report Series

Report	Release Date	Individual Use License	Company Wide Use License	Pages
Market Environmental Analysis	August 2004	\$750	\$2250	111
Market Demand for Enterprise Mobility – the real story	October 2004	\$500	\$1500	40
Business Strategies in the Enterprise Mobility Market: how to separate the Wi-Fi wheat from the Wi-Fi chaff	October 2004	\$500	\$1500	52
Market Decision Guide for Enterprise Mobility	August 2004	\$2500	\$7500	60
Segments In the Enterprise Mobility Market: who they are, how they behave, and why they buy	October 2004	\$750	\$2250	22
How to Sell Profitably to Segments in the Enterprise Mobility Market: tailoring your offering and your message	October 2004	\$900	\$2700	29
The Value Chain for Enterprise Mobility: how to evaluate and select partners	October 2004	\$500	\$1500	19
Assessing the State of the Wi-Fi Market: venue deployment performance	October 2004	\$750	\$2250	22

Bundling options available. For information, please contact ccggroup@ccggroup.net .