



2030 Enterprise Mobility Outlook

Benchmarking Deployment Strategies Against Businesses Most Prepared for Disruption

Executive Summary

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Tech-led Disruption and Impact on Enterprise Growth

The lightning-quick pace of technology change in the enterprise is something that weighs heavily on decision makers across the spectrum of technological maturity—from Innovators and Early Adopters to Mainstream Adopters and Laggards.

In an effort to outline what informs their strategic outlook for both today and the years

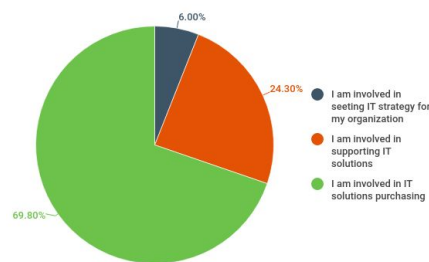
to come, VDC Research, an enterprise mobile technology market research authority, has engaged with IT decision makers across industry segments in a forward-looking discussion about tech-led disruption and its impact on enterprise growth, mobile workforces and transformation. The methodology for the research supporting this paper includes a survey of North America-based IT stakeholders as well as a series of in-

depth interviews with professionals in roles that range from the C-suite to IT manager and technician.

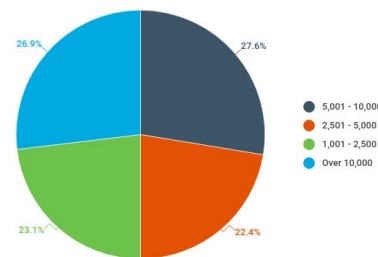
The emergent solutions discussed include Artificial Intelligence (AI), Internet of Things (IoT), cybersecurity, mobile solutions for frontline workers, Managed Mobility Services (MMS), robotic automation and more.

Figure 1: Survey Participant Demographics, North America, n=268

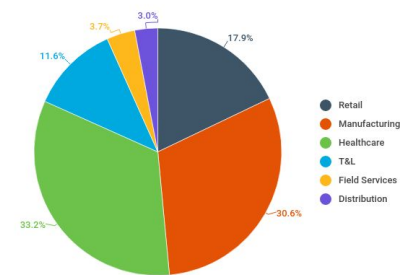
Involvement with IT Strategy/Initiatives



Number of Employees at Organization



Primary Business or Industry



Technology adoption segments definitions

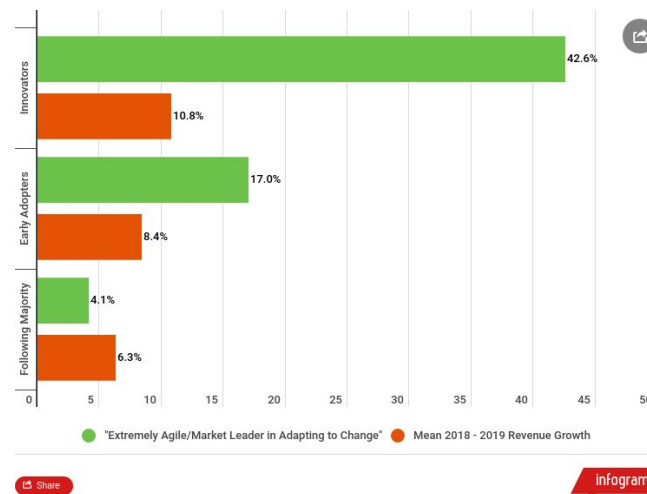
- **Innovators** – businesses that are the first to invest in new technologies, often spearheading the vertical-based applications of a given solution that is yet to have proven business cases.
- **Early Adopters** – businesses that typically deploy new technologies early on, but with a more judicious consideration of their proven use cases as defined by Innovators.
- **Mainstream Adopters** – businesses comprised of the more hesitant players that only participate in mass adoption of technologies once well-established.
- **Laggards** – these businesses often fall behind because of their inability to effectively operationalize stable, mobile-forward technologies. For the purposes of this analysis, and so as to not introduce sample size errors, we group Laggards with the Mainstream Adopters.

The benefits of following in the footsteps of Innovators regarding tech adoption and strategy are significant. As shown in Figure 2,

these businesses expect a higher mean revenue growth and are much more agile in adapting to change than both Early Adopters and Mainstream Adopters. These leaders have the most confidence in, and operational readiness for, the evolving technology landscape.

One thing is clear, Innovators are leading the way — most importantly, in overall revenue

Figure 2: Revenue Growth and Transformation Agility by Tech Adoption Segment



growth. With that truth serving as the foundation, this paper presents the data and insights revealed through our research upon the following four pillars.

Key Findings

1. Technologically-mature organizations highlight the importance of partnerships for disruption readiness.
2. Frontline mobility and MMS provide a foundation for continued tech success.
3. IT support capacity and ease-of-use are critical aspects of optimizing deployment.
4. Data-driven solutions are a pillar of innovation and disruption, but optimization will not come easy.

Tech Adoption Strategies for Disruption Preparedness

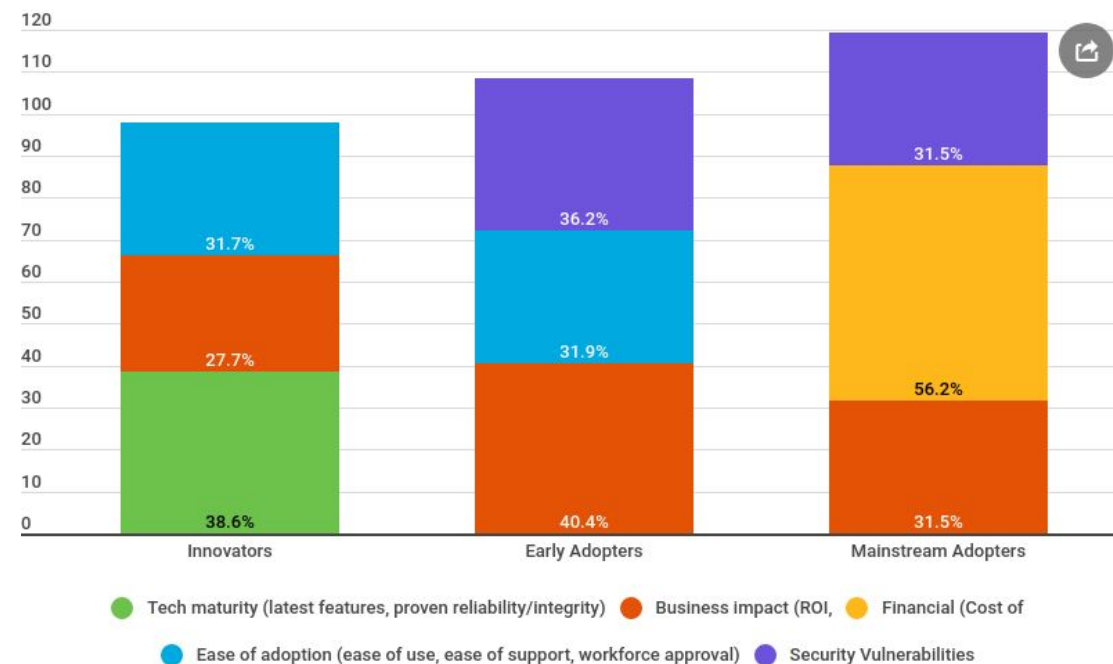


Tech Adoption Innovators Highlight the Importance of Partnerships for Disruption Preparedness

So, how do Innovators achieve such an effective strategic execution of their forward-thinking mindset? It begins with their singular focus on the immediate impact and benefits provided to their organizations as they evaluate solutions. As such, they are the only ones to name a technology's maturity – including its availability of the latest features and proven reliability – as their single most important technology selection criterion while other organizations are overly focused on the cost of technology adoption or potential issues such as exposure to security vulnerabilities (Figure 3).

What fuels this focus? Ultimately, the Innovators' circle of informative technology partners allows them to keep a finger on the pulse of the latest and greatest solutions. They are able to perceive a solution's maturity and readiness for useful deployment ahead of the market because of their closeness to key players

Figure 3: Top 3 Tech Selection Criteria by Tech Adoption Segment



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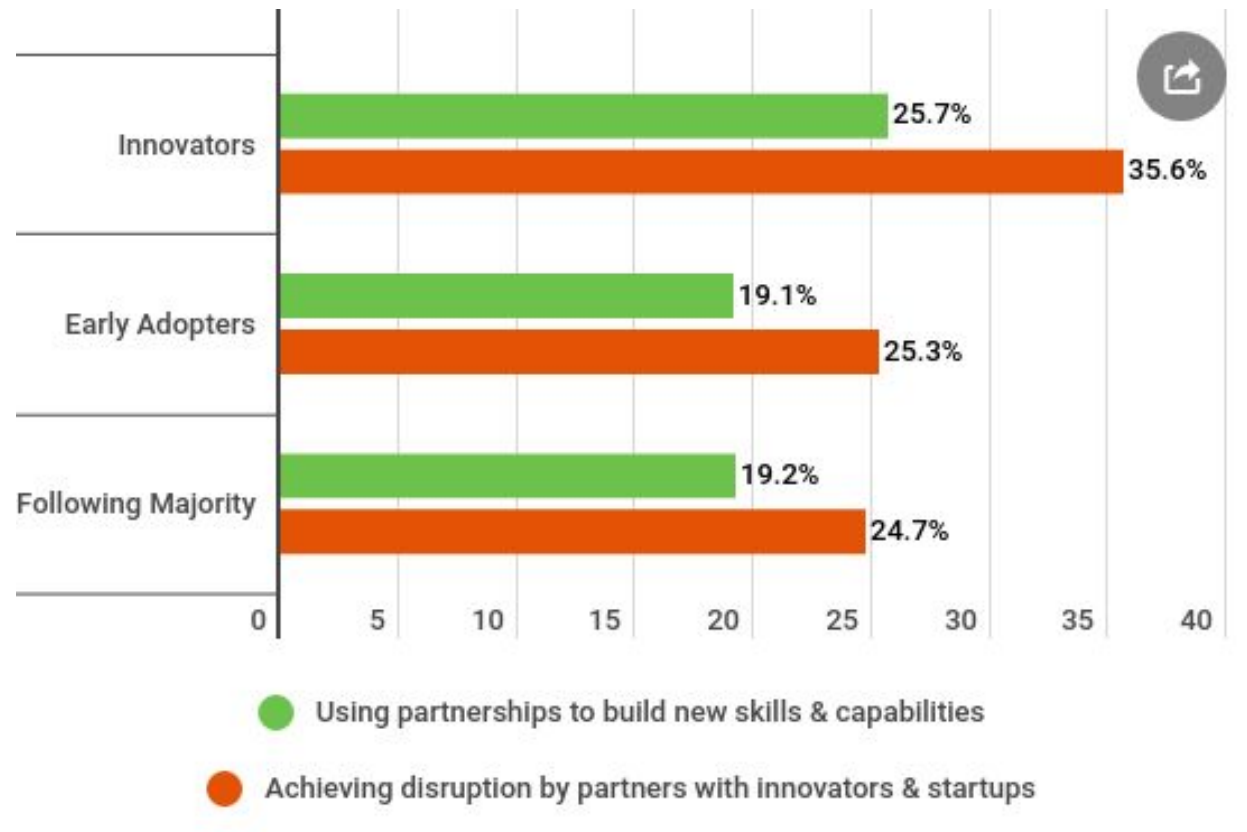
and opinion leaders. Prioritization of these technological partnerships is a key distinguishing characteristic of this group. In terms of tech-based relationships (Figure 4), Innovators:

- Have the highest rate of using partnerships to build new skills and capabilities.
- Have the highest rate of partnering with nascent tech innovators and startups as a top means of achieving disruption; are the only group to include this in their top three disruption strategies.

Although Innovators are the best equipped to respond to market changes and effectively tackle disruption, they implement new technologies first and effectively due to their extensive partnerships. Innovators know what they are good at – leveraging their internal resources for strategic direction and business transformation – while outsourcing the day-to-day implementation and management to experts.

Tech adoption leaders also stand out in terms of

Figure 4: Partnerships by Tech Adoption Segment



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their top selection criteria for evaluating solution providers – experience in their specific industry or vertical market is most important to them by a significant difference (Figure 5). This industry-specific experience provides an edge in the efficacy of a deployment; mobility decision makers commonly describe under-optimized implementations as a result of a solution provider’s lack of understanding of the needs and problems that are unique to a given deployment environment or vertical market. Also of note, they rated mobile logistics services as very important when no other segment did.

Other groups of businesses most commonly evaluate their partners based on financial impact and security services. Interestingly, early and Mainstream adopters both rated Cost of the Solution as the second most important evaluation criteria, a somewhat limiting criteria as it does not relate to issue resolution. Unsurprisingly, security services are important across the board.

Figure 5: Top 3 Tech Partner Evaluation Criteria by Tech Adoption Segment

Innovators	Early Adopters	Mainstream Adopters
Experience in our specific industry or vertical market 71.3%	Security Services 54.3%	Financial impact (benefit) to my business 55.6%
Security Services 54.5%	Cost of the solution 43.6%	Cost of the solution 46.6%
Mobile logistics services 53.5%	Support Services 41.5%	Security Services 37.5%

A woman is shown in profile, looking towards the right. She is wearing a dark blazer over a light-colored collared shirt. A complex, glowing blue network of lines and nodes is overlaid on her face and extends into the background. A hand from the left is pointing towards the network, with a bright light emanating from the point of contact. The background is dark on the left and transitions to a bright white on the right.

Foundation of Tech Success

Frontline Mobility and MMS Provide a Foundation for Continued Tech Success

In terms of the specific types of solutions and services used across tech adoption segments, there is a similar spread of those most actively used today:

- cybersecurity
- Managed Mobility Services (MMS)
- mobile solutions for frontline workers
- cloud infrastructure supporting them

The key difference is that all of these solutions are deployed at much higher rates among Innovators and Early Adopters compared to the Mainstream Adopters (Figure 6).

The use of solutions that optimize frontline employees – both the mobile devices and apps that they use and the cloud infrastructure supporting them – drops significantly from Innovators and Early Adopters to the more

Figure 6: Top 3 Most Actively Used Solutions by Tech Adoption Segment

Innovators	Early Adopters	Mainstream Adopters
Managed Mobility Services 85.2%	Cybersecurity 83.0%	Cybersecurity 74.0%
Cybersecurity 75.3%	Managed Mobility Services 83.0%	Managed Mobility Services 64.4%
Cloud infrastructure for mobile solutions / Mobile solutions for frontline workforce 71.3%	Cloud infrastructure supporting mobile solutions 80.9%	Mobile solutions for frontline workforce 61.6%

hesitant players, much like expected revenue growth and transformational agility decline in that order. This suggests that the stronger a business's investment in and strategic focus on workforce mobility are, the more successful its business model is; with the proper tools and services in hand, its employees are enabled to perform operations at the edge, support real-time decision making at scale and make transactions frictionless. Mobile devices and applications are increasingly crucial for business operations, so companies with the infrastructure, processes and support for end-user adoption and familiarity in place have a significant advantages in adapting to a new technological landscape.

Most interesting was the distribution in results with Innovators and Early Adopters using significantly more solutions than Mainstream Adopters overall. MMS represents the largest gap here; Innovators' use of MMS is over 20 percentage points higher than Mainstream Adopter's. An MMS partner can help navigate and simplify the ever-evolving scale and scope of technologies that are increasingly difficult to

manage internally. As evident by their breadth and depth in implementation of such services, Innovators and Early Adopters are poised to

continue widening the growth gaps between themselves and Mainstream Adopters.



Key for Technology Deployments



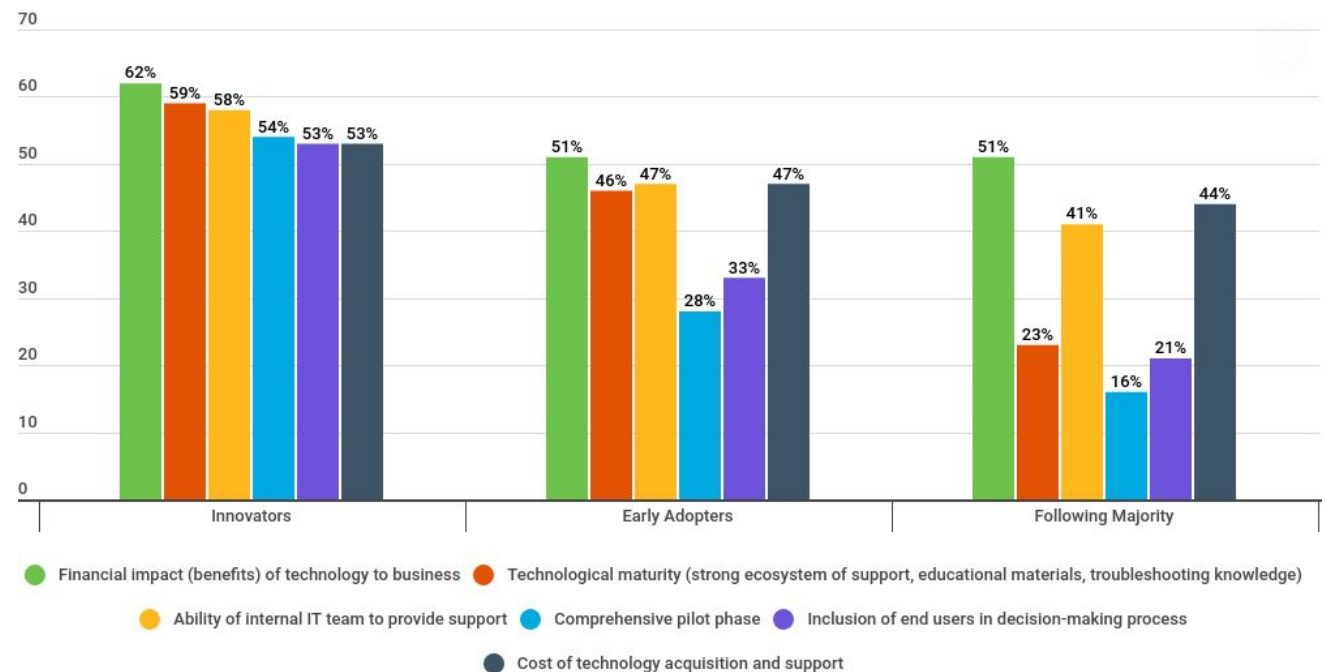
IT Support Capacity and Ease-of-Use are Key for Deployment Optimization

Attempting to follow in the strategic footsteps of Innovators does not necessarily entail an abandonment of existing priorities. Their elevated tech success and disruption readiness is due to a focus on implementation optimization and the technology support ecosystem rather than the technology prioritization itself.

In line with all segments, Innovators rank the financial impact that past technology deployments have had on their organization as the single most critical factor to its success (Figure 7).

This is not surprising – financial gain is a universal priority and measure of success for any enterprise project, tech-based or otherwise. What is noteworthy is the disparity between segments on the importance of technological maturity, the ability of internal IT teams to

Figure 7: Ranking of Past Deployment Success Factors by Tech Adoption Segment



provide support and the importance of a comprehensive pilot phase.

These implementation attributes rank much more strongly for Innovators and reaffirm their advantageous approach to tech adoption shown earlier in [Figure 3](#), which outlines their top tech selection criteria including:

- The availability of the latest features Proven reliability
- Ease of use
- Ease of support
- Workforce approval

Early and Mainstream Adopters instead select their solutions based primarily on business impact, cost and security vulnerabilities. These are all immensely important factors, but they cease to matter if a technology investment is poorly deployed, optimized and supported — if it is not usable. Moreover, this mindset drives organizational behavior that initially attempts to disprove the value of a potential investment (e.g. Is it too expensive? Is it not secure?). Additionally, as evident in [Figure 7](#), Innovators

put emphasis on testing end user adoption, IT support capabilities and a technology's maturity through the implementation of comprehensive pilot programs. This correlates to Innovators' heavier use of partnerships, as a thorough pilot phase is typical of a deployment launched with the guidance of an effective tech partner.

To successfully introduce new technologies into

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"The most successful new tech implementations have involved a solution provider that really knows their product, has a good training program and understands the [healthcare] side of things – we have had bad deployments because even if the tech was great, nobody would use it or know how to use it.

IT Operations & Services Manager, Healthcare"

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a business, both adequate IT capacity and end user ease-of-use are of critical importance, and both are becoming increasingly difficult to achieve. In an interview for this research, an IT Network Infrastructure & Operations Manager for a building materials manufacturer admits that, presently, "a lack of internal expertise is the main barrier that prevents full optimization" of their organization's deployments. This is a crucial point regarding the growing importance of outsourced partnerships that can help manage the burden of expanding mobile fleets as well as ensure the intuitiveness of advancing solutions.

Data-driven Solutions a Pillar of Innovation

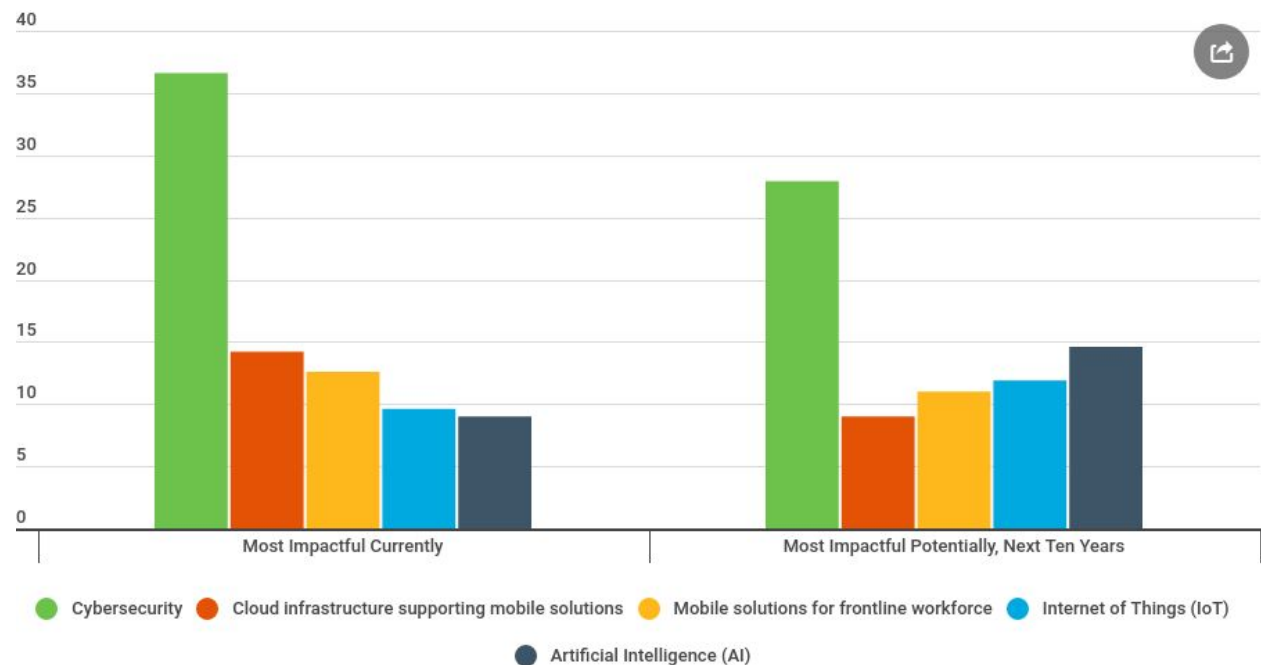
Data-driven Solutions are a Pillar of Innovation and Disruption, but Optimization Will Not be Easy

Overall, IT decision makers expect cybersecurity and AI (artificial intelligence) to be the most potentially impactful technologies through 2030. Similarly, leveraging data or software as value-add products or services and data analytics are expected to be the drivers for achieving innovation in that outlook period.

The growing weight placed on AI, which jumps to the second most impactful tech by 2030, is concerning for a couple of reasons:

- Interviewed decision makers' most frequent comment on realized AI potential was that their organizations are just starting to 'scratch the surface' of optimization.
- Respondents that believe AI will be the single most impactful solution through 2030 are significantly less likely to be Innovators.

Figure 8: Top 5 Most Impactful Technology, Today vs 10 Years



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Thesesame respondents are also more likely to believe they are at a high risk of tech-led disruption. This indicates that the promise of AI solutions will be inhibited by an inability to execute effective implementations of them.

Even though these stakeholders acknowledge the transformative impact of AI-based solutions, their companies are not quite equipped to leverage such solutions currently. If artificial intelligence and data-driven technologies are to live up to their transformational potential, then organizations will have to take the appropriate steps to enable optimization by learning from Innovators' technology approaches.



"A lot of our clients are recognizing that the volume of data is not the important piece. The amount and scope of data has become unwieldy, so now it is more so important to be able to present and actualize that data – to recognize when a turn in business operations pops up. "

Founder & CEO, Systems Integrator/Enterprise Solutions Vendor

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Conclusion



| The Bottom Line

Looking ahead, disruption readiness may have less to do with the specific technology types invested in and more to do with the mindsets of enterprise decision makers. IT and mobility decision makers that have the most confident and prepared technology outlooks through 2030 offer several advantageous points of guidance with their deployment strategies. An openness to technology partnerships is unquestionably a major operational advantage; IT teams are spread too thin already, and the size of mobile fleets, cybersecurity threats and data analytics touchpoints will continue to outpace their ability to monitor and manage them.

Early Adopters and the Mainstream Adopters are moving forward with initiatives to achieve disruption ahead of making foundational strategic investments in infrastructure, support and processes. It is recommended that organizations shift their disruption strategies to reprioritize their ability to support new

technologies ahead of their eagerness to deploy the solutions themselves. This requires engaging tech partners – specifically the use of Managed Mobility Services as an outsourced hub to secure, procure, deploy and manage an organization's mobile fleet – but also more generously deploying user-friendly mobile solutions to support frontline workers. This will help develop satisfaction among mobile workers and achieve the productivity and revenue gains boasted by Innovators.

As you look to future-proof your organizations, be sure to identify partners with a proven track-record providing industry and client-specific solutions harnessing the value of technology that directly impact your organization's operations today while providing a foundation for benefitting from emerging solutions as they mature.

About the Authors



ABOUT THE AUTHORS



Pat Nolan supports a range of syndicated research programs and custom consulting projects within VDC's Enterprise Mobility practice. His previous market research and consulting coverage includes enterprise communications and the MarTech space. Before that, he supported the marketing and communications efforts of a mobile healthcare solutions developer. Pat graduated from Syracuse University with a B.S. in Advertising and a minor in Information Management & Technology.

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About VDC Research

Founded in 1971, VDC Research provides in-depth insights to technology vendors, end users, and investors across the globe. As a market research and consulting firm, VDC's coverage of AutoID, enterprise mobility, industrial automation, and IoT and embedded technologies is among the most advanced in the industry, helping our clients make critical decisions with confidence. Offering syndicated reports and custom consultation, our methodologies consistently provide accurate forecasts and unmatched thought leadership for deeply technical markets. Located in Natick, Massachusetts, VDC prides itself on its close personal relationships with clients, delivering an attention to detail and a unique perspective that is second to none.



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