

Ahead of the Curve

How Mobile Tech Adoption Maturity is
Reshaping Enterprise Growth

Executive Summary

Mobile Tech Adoption Maturity

Success in the current fast-moving digital landscape often hinges upon how effective enterprises can manage their workforces transitioning from laptop and PC-dominance to mobile device-centric environments. IT leaders and decision makers navigating these challenges must settle upon a coherent strategy and cadence for mobile tech adoption relative to their competitors.

**Innovators are
worth imitating,
they report **11%**
year/year growth!**

To establish a useful metric for determining where they rank, we've partnered with VDC Research, a leading enterprise mobile technology market research authority, to create a Mobile Tech Adoption Maturity Curve based on quantitative research of IT leaders & decision makers. We classified the participants in four distinct categories based chronologically on their engagement with emerging mobile technology:

- Innovators
- Early Adopters
- Early Majority
- Late Majority and Laggards

We evaluated them across four key drivers of readiness:

1. Current mobile investment optimization strategies

2. Decision making priorities
3. Operational agility
4. Preparedness for future innovation

Among the many insights we'll explore in this paper, we determine why Innovators are successful and **grow almost 11% year over year**, substantially more than other segments. There is a clear correlation between this strategic foresight and their ability to transcend the challenges of tech-led disruption.

Read on for how you can assess your organizational readiness for tech disruption and benchmark your own tech adoption strategies.

Why Mobile Tech Adoption Maturity Curve?

Mobility Tech-led Disruption

If one were to consider a single word that epitomizes the relentless onslaught of technological evolution in the past decade, it would likely be “disruption”. Any industry that thought itself immune to the perils of digital disruption quickly found itself in turmoil. Travel agents were displaced by aggregating sites such as Travelocity and Expedia. Transportation services like Uber, Lyft and car subscriptions are changing the way millennials view car ownership entirely. The hotel industry is struggling to cope with the widespread proliferation of Airbnb. Amazon.com has disrupted established players in a number of industry verticals ranging from book publishing to grocery retailers.

Mobile technology itself was completely disrupted with the 2007 arrival of the iPhone. While Apple was infamously dismissed by

smartphone industry leaders of the time such as Palm, Blackberry and Microsoft, it now holds a commanding lead in smartphones, tablets and wearables. Meanwhile, those three leaders are

Figure 1: Desktop vs Mobile vs Tablet Market Share North America



now relative non-entities in the mobile space –in just over a decade.

The specter of seemingly stable and dominant players being consigned to the scrapheap of business history looms large over IT leaders and decision makers. In a recent [Forbes Insights/Treasure Data survey](#), **51% of executives** indicated a high level of risk to their organization over just the next five years from technology-driven disruption.

The more telling statistic from that survey is that a whopping **83% of executives** who see their organizations as market disruptors report increased revenue over the past three fiscal years. Meanwhile, just 54% of executives leading in non-disruptive enterprises report similar growth.

We set out to determine what technology IT decision makers were using and planning to use in the coming decade. More importantly, we sought to identify what had made them successful in their tech deployments and assess why those strategies make some organizations more prepared for tech-led disruption than others.

We surveyed hundreds of mobility decision makers, and what we found was not only interesting, but also very informative for decision makers assessing their current state of readiness for tech disruption.



Innovators to Laggards: Their Organizational Personalities

Mobile Tech Adoption Maturity Curve Classes

In this research we surveyed only technology decision makers already deploying mobile technologies for frontline workers in some capacity. So, in that regard the distribution of our segments are more heavily weighted toward Innovators and Early Adopters than you

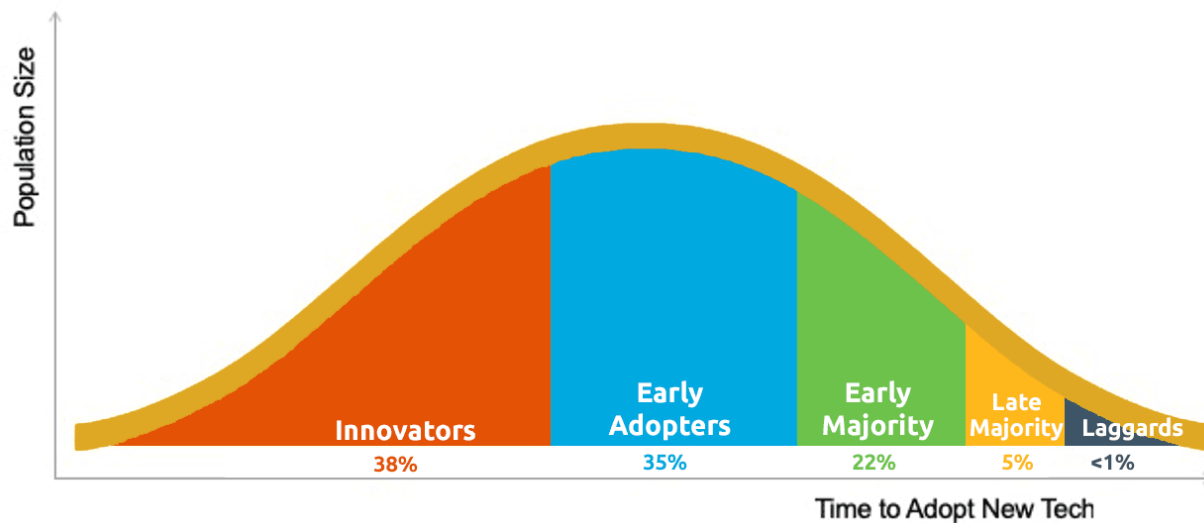
would typically expect to see. This gave us the advantage of being able to deeply explore the different approaches of Innovators and Early Adopters – and understand the strategies that set them apart in their tech adoption and growth.

Innovators

Innovators are among the first businesses to invest in new technologies with an understanding of the risk-reward factor of doing so. They have the highest rates of full optimization with their actively used tech, with their cybersecurity and cloud infrastructure deployments being the most optimized. They typically spearhead the usage of a given solution before others see the value of its application in their particular industry.

Notably, in terms of IT decision-making, Innovators have by far the greatest presence of dedicated IT strategy roles involved in IT strategies/initiatives compared to other segments. It is a more common approach to have individual roles to support and purchase technology, thus suggesting a greater leadership commitment to IT and mobility within these organizations.

Figure 2: Mobile Tech Adoption Maturity Curve



The standout point of their digital strategies is the use of partnerships to stave off disruption and enhance organizational capabilities – they are the only segment to feature this in their top three. Further, they consistently indicated their key advantage was the use & optimization of Managed Mobility Service (MMS) providers.

Early Adopters

Early Adopter businesses usually deploy technologies early on, but with a more judicious consideration of their proven use cases as defined by Innovators. Although Early Adopters have similar mobile tech stacks to Innovators', their ability to fully optimize lags far behind.

Across the board for each technology/service implemented, Innovators' level of optimization is **10 to 20 percentage points higher**.

Innovators have an advantage in being first to market with deployments, being the first to work out their flaws and optimize them, and/or their operational agility makes them better off in adapting to the changes of new deployments in general.

Another major difference between Early Adopters and Innovators, likely attributed to the divergent tech investment priorities and strategies, is in their operational agility – **only 17% of this segment** claim to be extremely agile/market leaders in responding to change compared to over **40% of Innovators**.

Early Majority

Organizations typified in the Early Majority tend to drive the first mainstream wave of a given solution's adoption and implementation once Innovators and Early Adopters have established the value of doing so.

The presence of dedicated IT strategy decision making roles drop heavily from Innovators and Early Adopters to the Early Majority. Not surprisingly, then, organizational decision making is the biggest barrier to responding to change for this segment; they simply lack the internal leadership to advocate for innovative technological investment as much as the leading tech adoption segments do. The following two barriers are:



- Lack of a culture of innovation
- Lack of executive support – all of which are very much intertwined to the same root problem.

Top selection criteria for both tech solutions and tech partners are primarily financial factors, followed by security matters. Cost trumps all; functionality and usability are second-rate concerns, which can lead to inadequate deployments. Furthermore, this fixation on cost is another barrier to responding to change, getting in the way of the imaginative investments that Innovators are more likely to make.

Late Majority and Laggards

These businesses often fall behind because of their inability to effectively operationalize stable, mobile-forward technologies.

It is interesting that the Late Majority and Laggards, and even the Early Majority, select technology on factors that are not usually evident until after a deployment – such as financial benefit and business impact – while

Innovators have a more imaginative tech investment approach. They consider the functionality and usability of a given solution to envision the financial/business impact it may have for them specifically rather than adopting solely based on the on-paper record of the solution's history of benefiting other organizations.

The result of such a cautious mindset is a lessened ability to respond to change, with barriers of “lacking executive support” and “slow organizational decision making” reflecting this approach and preventing agility.

Key Tech Adoption Indices

Technology and Operational Savvy Indicators

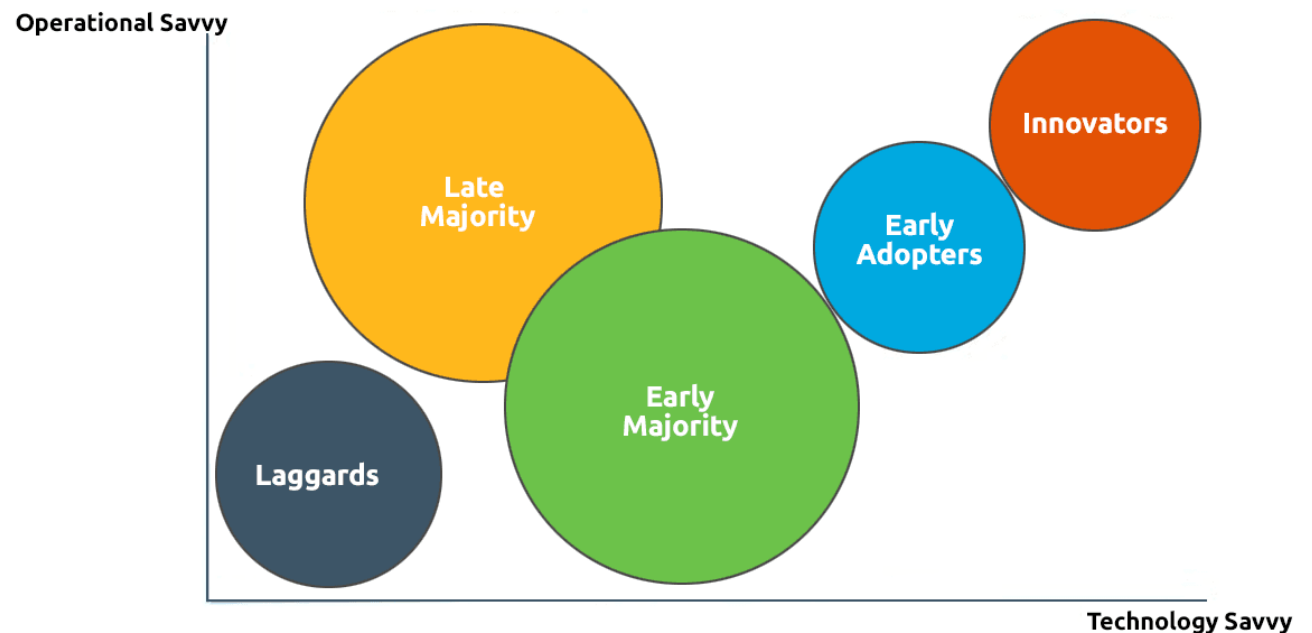
In figure 3, there are two axes that we look at to determine mobile maturity on an organizational level:

- **Operational Savvy** – how do they make decisions, their business agility and role involvements of the organization.
- **Technology Savvy** – which includes the capabilities and skills of the organization in deploying and optimizing technology and their forward-projecting strategies.

What we found in the research is there are four underlying indicators of technology and operational savvy:

1. Current mobile investment optimization strategies
2. Decision making priorities
3. Operational agility
4. Preparedness for future innovation.

Figure 3: Mobile Tech Adoption Matrix



Current Mobile Investment Optimization Strategies

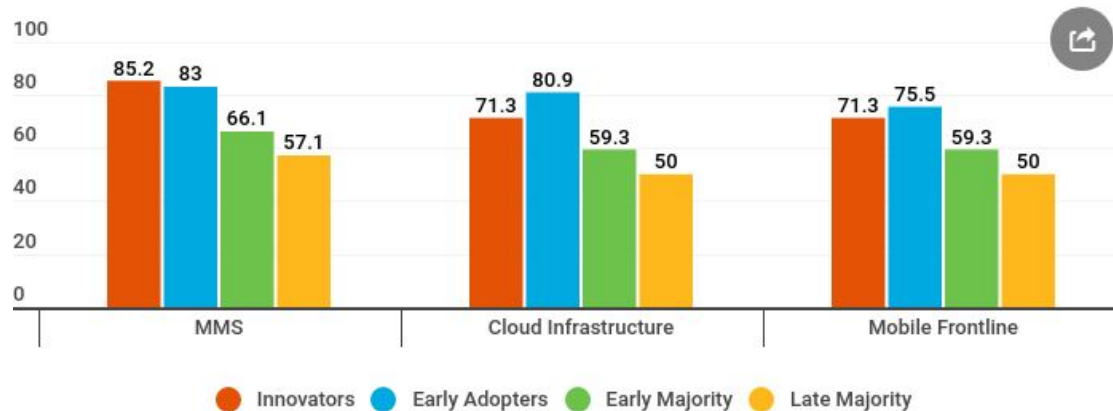
The acid test for differentiating today between Innovators, Early Adopters and the other segments really plays out in where they focus their efforts and capabilities to deploy, optimize and maximize return.

1. **Actively used tech services** – Innovators and Early Adopters focus on getting the framework

for the support of their technology in place – with Managed Mobility Services (MMS) providers being a priority. (Figure 4 represents the percentage of each class)

2. **Technology optimization** – Innovators are best at squeezing out the most from the technologies they deploy - by almost **50% more** than any other segment. While the technologies themselves matter, they gain a clear advantage

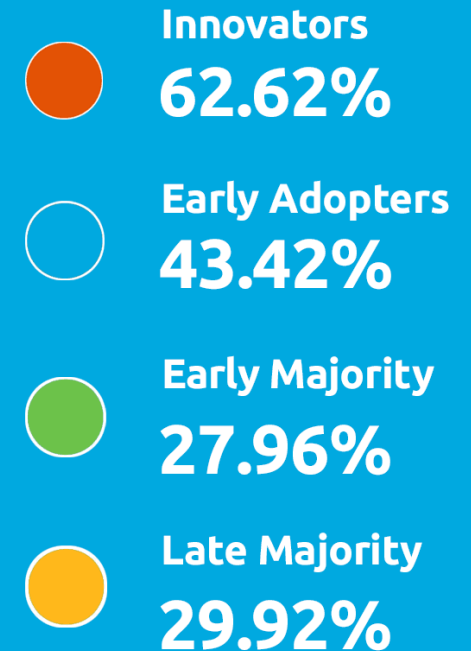
Figure 4: Actively Used Tech Services



Share

infogram

Average Optimization of Current Technologies



by getting the most return on investment from their mobile tech.

3. **Technology implementation success factors** –

Innovators and Early Adopters look to “The How” in terms of integrating new technology efficiently and effectively, whereas the Majorities look at “The Why” in terms of justification of decision making.

These insights collectively reveal that while Innovators look to build the supporting frameworks for technology adoption, the other classes are focused upon the cost/financial implication and justification of deploying technology. This hesitancy involves more groups in the decision-making process, thereby delaying and diluting the efficacy of the solution. Their focus is centered upon the technology cost rather than overall impact on business growth.

Decision Making Priorities

Dedicated strategic roles are important. As we previously mentioned, Innovators have, by far,

Technology Implementation Success Factors

Consider How:

- Innovators are the only ones to prioritize Technology Maturity (strong ecosystem of partners) in their decision making.
- Only Innovators and Early Adopters indicated that the ability of IT teams to support the deployment was important (58.4% and 46.8%).
- Innovators also look at deployments differently – rating very highly the importance of both mobile logistics services and a comprehensive pilot.

Consider Why:

- Cost of the technology was NOT important to Innovators – but it is for Early Adopters and Early Majority.
- Executive sponsorship was important for Early Majority
- Collaboration with IT and business decision makers and the inclusion of end users in the decision making are factors exclusive to the Late Majority.

the greatest presence of dedicated IT strategy roles involved in planning IT initiatives compared to other segments. The breakdown of their decision-making rationale concerns the following:

- *Technology selection* - All groups rate Business Impact and Ease of Adoption as significant. Innovators, however, are the only segment to indicate that Technology Maturity is important – and it’s actually their most important criterion. It’s fascinating to note that these organizations are first to adopt, yet they still value maturity. Why? Because maturity doesn’t mean the tech’s lifespan for this segment – it means it’s ‘readiness’ to be deployed, is it supported, well documented and readily available? And, because Innovators partner extensively – they are well equipped to assess the ‘maturity’ of the technology. Innovators follow technology closely, work with providers to understand it definitively, and position their organizational capabilities to pounce exactly when the technology is stable. This is the essence of their competitive advantage.

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%

- As expected, Early Majority and Late Majority rate total cost as the most important feature (54.2% and 64.3%, respectively). This datum again points to the approach of prioritizing the technology – and the price of the technology – more so than potential beneficial business impact.

Innovators really stand out alone in the category of Extremely Important Tech Partner Criteria, and it may be their organizational knowledge and willingness to create and sustain partnerships that drives this behavior.

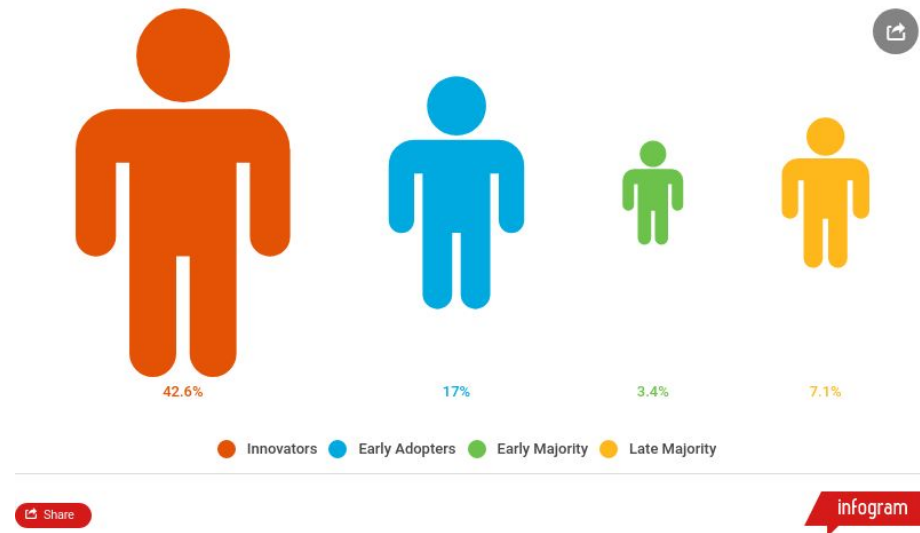
In addition to Innovators being far more partner-oriented, there are two interesting differences in Innovators approach to partnering that stand out:

1. Innovators rank experience in their specific industry or vertical market – understanding their particular customer – as their most important criterion at **71.3%** while the only other segments to mention that were almost **50%** lower in importance.
2. Innovators don't rank cost of the MMS provider's solution as important at all – they're focused on the features and benefits. All other segments rated cost the first or second-most important criteria.

Operational Agility

How well-equipped are businesses to adapt to shifts and change? We asked respondents how well their organizations adapted to change, and they indicated their operational agility in Figure 6.

Figure 6: How Well Equipped are Businesses to Adapt to Shifts and Changes



Barriers to Change – Innovators and Early Adopters indicated that organizational capabilities (Internal IT team, IT Service partners) were the biggest barriers to tech adoption. Early and Late Majority classes focused on intrinsic attributes around organizational readiness & decision-making (e.g. lack of support, lack culture of innovation, organizational decision making).

Conclusion

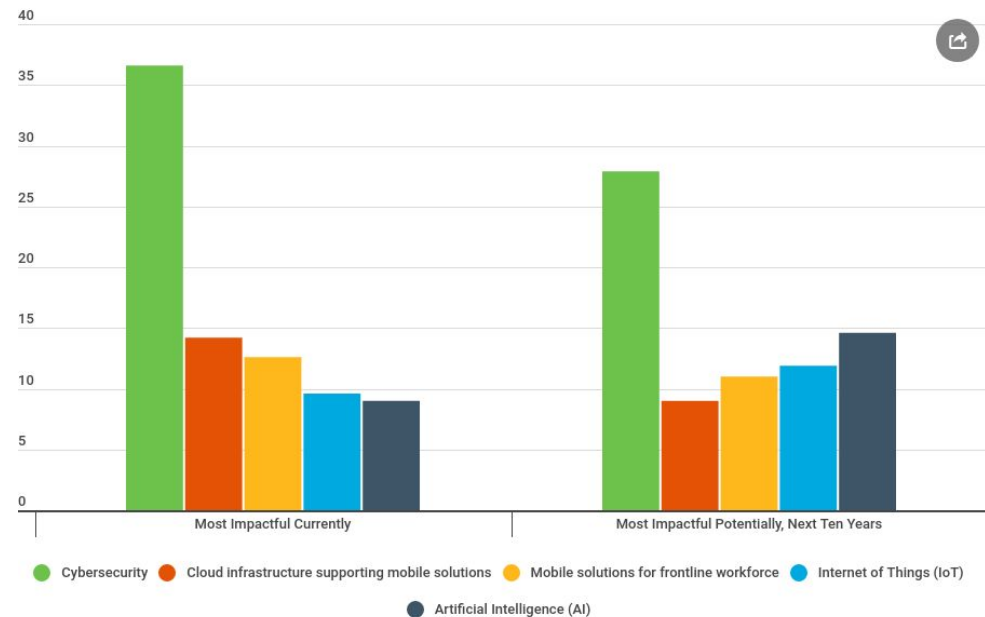
Preparedness for Tech-led Disruption

Preparedness for Future Innovation

Finally, we broke out what each segment anticipated will be most impactful technologies in the next decade. We learned the following:

1. All segments believe that mobile solutions for frontline workers will be among the most impactful disrupters over the next decade. Clearly, effective managed mobility for enterprise will be a major differentiator across the spectrum.
2. Innovators and Early Adopters believe the Internet of Things (IoT) will be among the most impactful technologies in 10 years. The Late Majority, conversely, rank IoT as something they have not used or have plans or considerations for. As networked objects (and the data they provide) become increasingly prevalent in the years to come, the gulf between these groups will only grow.

Figure 7: Top 5 Most Impactful Technology, Today vs 10 Years



3. **36.4% of the Late Majority** believes the most impactful technology in the next ten years will be Automation, or robots replacing humans for repetitive tasks. Yet, Innovators

and Early Adopters place that same Automation as chief among the emerging technologies that they have no plans to use.

Looking Ahead

Getting a clear assessment of your organization's mobile maturity status is critical in laying out your disruption readiness strategies for the next decade. While day-to-day operations and immediate business objectives may occupy the majority of your organizational focus, it's beneficial to remember how quickly technology-led disruption can transform your particular industry. Innovators lead the pack with strong technology outlooks through 2030 backed by ample operational agility and focus on the organizational impact of technology.

Their openness to technology partnerships is another key differentiator. By seeking like-minded Innovators, including both managed services providers to acquire needed capabilities and scale and startups to partner with, they ensure that the Innovator mindset powers a unified strategic focus that allows them to benefit most from well executed and

fully optimized mobile technology deployments.

Most importantly, Innovators have their mindset validated by a key performance indicator: they lead all respondents in estimated revenue growth for the past 12 months. The takeaway here is clear: Simply surviving the rapid pace of mobile technological advancement for the next decade isn't enough. Enterprises must meet organizational obstacles with a proactive growth mindset that weighs the risk of tech adoption against the myriad of rewards that await the Innovators of today and tomorrow.



Contributing Partners:

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You want to put your mobile transformation strategy into practice... But how do you determine if your organization is ready? What are the characteristics behind those that rise to the top? And where do you stand?

The first step – take this two-minute assessment to see if your organization is equipped for successful mobile transformation.

[Take Assessment](#)

Find out where your organization stands in the :

Mobile Maturity Matrix Curve

Fill out the form to speak with a Mobility Specialist