InCommon Marketing Study

CONFIDENTIAL overview for InCommon Steering
April 2017

Outline

- Process

- Executive Summary of Key Findings and Recommendations

- Insights

- Next steps

Caveats

- This project created a tremendous amount of data

- We have only begun to boil this down to actionable essences

- Key findings are not completely validated, we're sharing them here as-is

- We'll continue our analyses and have more to share, discuss at Global Summit

INTERNET2®

Process

- **Phase One**
  - Current state assessment
  - Internal interviews

- **Phase Two**
  - Market analysis
  - External interviews

- **Phase Three**
  - Broad, quantitative survey
  - Survey analysis
  - Four market segments: Commercial (28), Regionals (10), Not-for-Profit (21), Higher Education (296)

Executive Summary of Key Findings

- Two personality segments that represent 32% of InCommon's audience can effectively and more efficiently drive InCommon perceptions and value in the market;

- IAM as a Service is in high demand across all segments;

- Commercial and Non-Profits value the Federation over all else but also value cost savings and operational efficiencies from InCommon;

- Microsoft and Google are making inroads against InCommon on brand perceptions and leadership;

- Ignorance about IAM and Federations is a key issue in the market.

INTERNET2®

Executive Summary of Key Recommendations

- Focus on the two personality segments (Activists and Scholars) with special programs and opportunities that will feed their passions and hunger for IAM knowledge and professional recognition;

- Aggressively develop IAM as a Service with input from all a broad cross section of stakeholders to ensure it meets their needs;

- Refine and further develop service offerings and communications to drive further cost savings and operational efficiencies from participation in InCommon;

- Develop and secure an IAM leadership position against Google and Microsoft through the creation of third-party content and by activating Scholars and Activists in the community;

- Develop snackable content for busy and low engagement technologists specifically about IAM and Federations.

INTERNET®

Insights

(Personality Type)

We uncovered five distinct Personality segments with unique needs, attitudes, and behaviors around IAM

Minimalists
21%

Activists
15%

Scholars
18%

Functionalists
19%
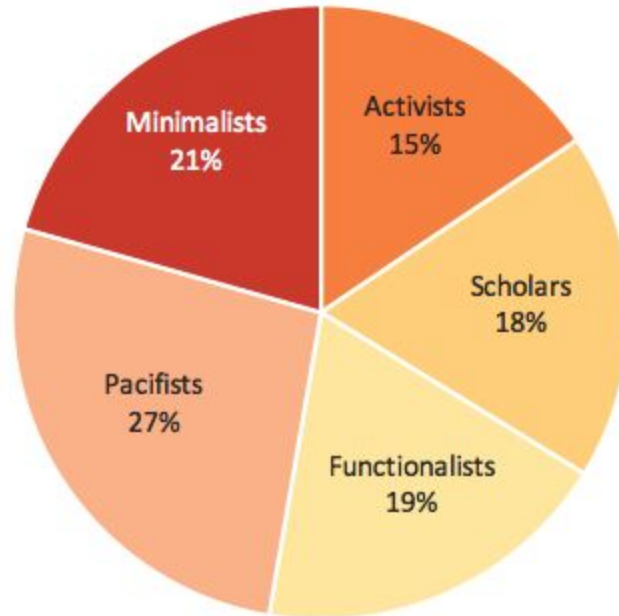
Pacifists
27%

Introducing the five distinct personality segments

Name	Activists	Scholars	Functionalists	Pacifists	Minimalists
Picture					
Descriptive Quote	"I love using, learning about, and sharing my knowledge of IAM with others""	"I am dedicated to leaning about and helping people I know with their IAM problems"	"It is most important that I can competently use and maintain IAM solutions on my job"	"IAM is something I am responsible for but it is not the primary focus of my job"	I use IAM only in so far as I have to. I just to try to get by with as little as I need to"
Incidence	15%	18%	19%	27%	21%

Higher Education Needs, Attitudes, & Behaviors
Activists

Segment Overview

Hyper active IAM enthusiast

Passionate about IAM

Extrovert – loves affirmation

Demographics

Age

25-34	35-44	45-54	55-64	65-74
9%	33%	40%	16%	2%

Gender

Male	85%
Female	7%
Other	2%

Number of People within company who support IAM Solutions

1-3 People	31%
4-6 People	24%
7-10 People	18%
Over 10 People	27%

Participation Level

Level

L4, L3, L2, L1
- 12%
- 9%
- 9%
- 70%

Support Spend ($)

$0-50M	31%
$51M-100M	18%
$101M-150M	7%
$151M-200M	9%
$201M-250M	13%
$251M-300M	16%
$301M+	7%

IAM Teaching and Learning Behavior

|	Once a Day	Once Every Few Days	Once a Week	Once a Month
Read industry & IAM publications	2%	13%	32%	53%
Speak and help online	15%	25%	18%	43%
Learn online	11%	21%	16%	51%
Speak and help peers	39%	25%	19%	16%
Learn in person	0%	33%	0%	67%

*Percentages are aggregated then averaged

IAM Training Behavior

Answer questions in-person to peers or co-workers	91%
Publish documentation/tutorials	74%
Answer questions online	74%
Host/lead training sessions	67%
Work in an IAM/InCommon/TIER working group or committee*	63%
Publish blog posts or videos*	35%

Top Job Titles

Security Execs	35%
IT Management	26%
IT Staff	24%
IT Execs	15%

IAM Roles

Technical Implementation	52%
Manage use of IAM system	46%
Supervise IT staff	41%
General Management	39%
Senior Execs	37%

Level of Input into IAM Purchase Decisions

Solely responsible	9%
Solely responsible & shares	26%
Shares responsibility	26%
Has some input	39%

Read or Study IAM Outside of Work

- More than 6 hours/week: 9%
- Never: 7%
- Less than 1 hour/week: 26%
- 1-5 hours/week: 59%

Likelihood to Recommend InCommon

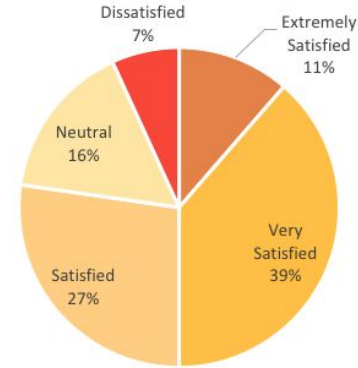|	
Extremely Likely	43%
Very Likely	35%
Likely	13%
Neutral	4%
Extremely Unlikely	4%

INTERNET2

Higher Education – Activist's Satisfaction

Activists index highest on VSAT+ with Internet2 at 50%, followed by InCommon at 46% and NET+ at 28%. However in SAT+ InCommon just edges out Internet2.
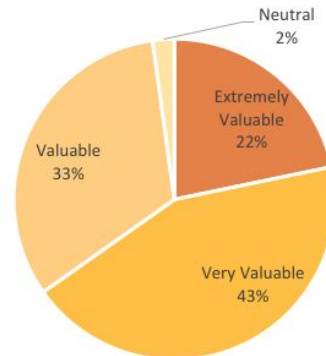

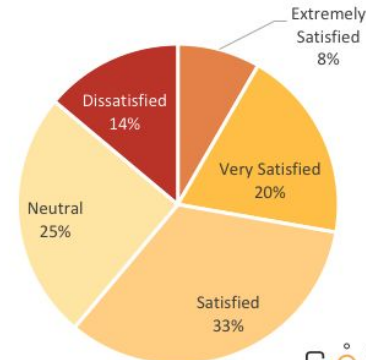InCommon Satisfaction - Activists
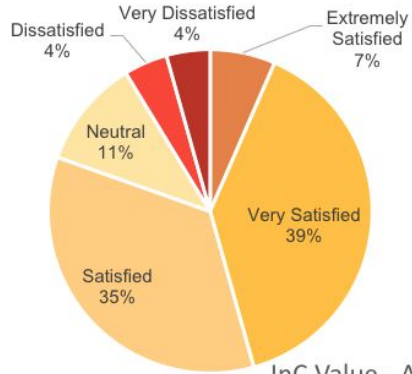
I2 Satisfaction - Activists

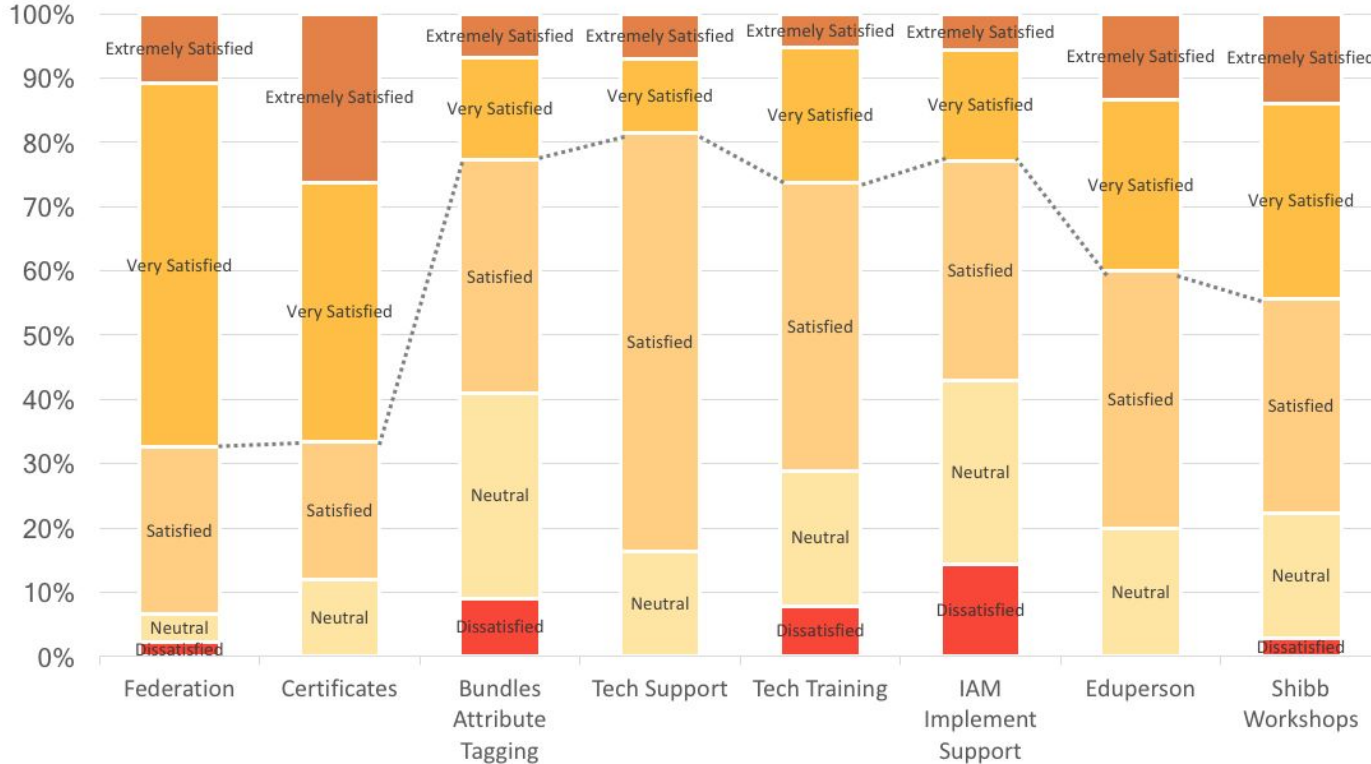

InC Value - Activists

NET+ Satisfaction - Activists

COVALENCE

Higher Education – Activist's Satisfaction

VSAT+ runs highest with the Federation and Certificates. At SAT+ Tech Support is not far behind.
Opportunities for improvement exist in Attribute Tagging and Implementation Support.

InC Service Satisfaction - Activists

Persona Summary

Activists

- 15.6% of respondents (46)
- 70% in L1 schools
- 100% InCommon participants
- 50% IT management or staff
- 78% very/extremely likely recommend InCommon

Scholars

- 18.3% of respondents (54)
- 53% L1; 30% L4
- 43% security execs
- 72% very/extremely likely recommend InCommon

Functionalists

- 19% of respondents (56)
- 50% L1; 20% L2
- 54% IT management or staff
- 73% very/extremely likely recommend InCommon

Pacifists

- 26.8% of respondents (79)
- 38% L4; 29% L3
- 48% IT execs
- 59% very/extremely likely recommend InCommon

Minimalists

- 20.3% of respondents (60)
- Evenly split among all levels
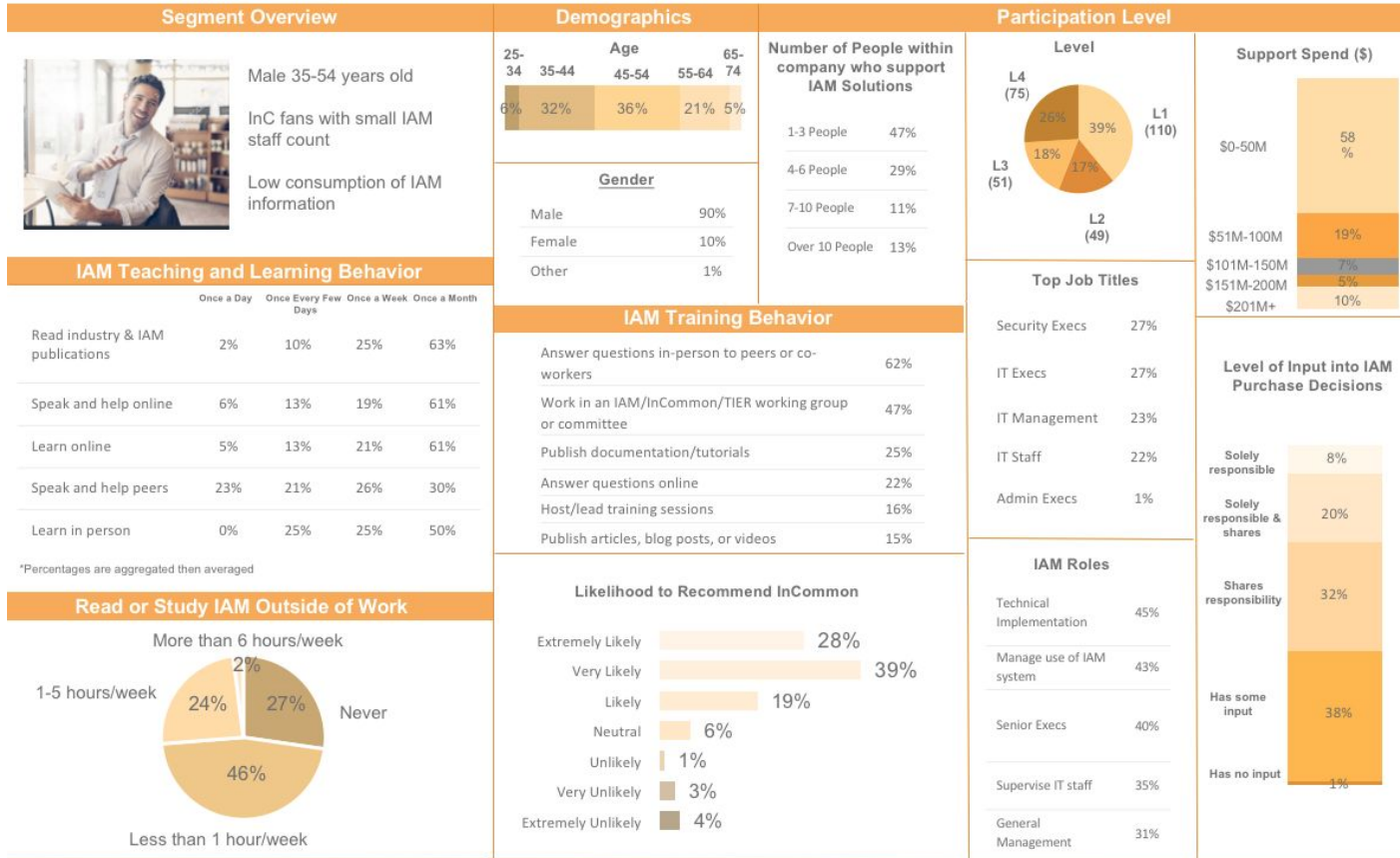- 55% very/extremely likely recommend InCommon

INTERNET2®

Insights

(Market Segment)

# Higher Education Needs, Attitudes, & Behaviors

297 Respondents

61% outside L1 with 25% committed to IAM

Segment Overview

Male 35-54 years old

InC fans with small IAM staff count

Low consumption of IAM information

Demographics

Age

25-34	35-44	45-54	55-64	65-74
6%	32%	36%	21%	5%

Gender

Male	90%
Female	10%
Other	1%

Number of People within company who support IAM Solutions

1-3 People	47%
4-6 People	29%
7-10 People	11%
Over 10 People	13%

Participation Level

Level

- L4 (75): 26%
- L1 (110): 39%
- L3 (51): 18%, 17%
- L2 (49)

Support Spend ($)

$0-50M	58%
$51M-100M	19%
$101M-150M	7%
$151M-200M	5%
$201M+	10%

Top Job Titles

Security Execs	27%
IT Execs	27%
IT Management	23%
IT Staff	22%
Admin Execs	1%

Level of Input into IAM Purchase Decisions

Solely responsible	8%
Solely responsible & shares	20%
Shares responsibility	32%
Has some input	38%
Has no input	1%

IAM Roles

Technical Implementation	45%
Manage use of IAM system	43%
Senior Execs	40%
Supervise IT staff	35%
General Management	31%

IAM Teaching and Learning Behavior

	Once a Day	Once Every Few Days	Once a Week	Once a Month
Read industry & IAM publications	2%	10%	25%	63%
Speak and help online	6%	13%	19%	61%
Learn online	5%	13%	21%	61%
Speak and help peers	23%	21%	26%	30%
Learn in person	0%	25%	25%	50%

*Percentages are aggregated then averaged

IAM Training Behavior

Answer questions in-person to peers or co-workers	62%
Work in an IAM/InCommon/TIER working group or committee	47%
Publish documentation/tutorials	25%
Answer questions online	22%
Host/lead training sessions	16%
Publish articles, blog posts, or videos	15%

Read or Study IAM Outside of Work

- More than 6 hours/week: 2%
- 1-5 hours/week: 24%
- Never: 27%
- Less than 1 hour/week: 46%

Likelihood to Recommend InCommon

Extremely Likely	28%
Very Likely	39%
Likely	19%
Neutral	6%
Unlikely	1%
Very Unlikely	3%
Extremely Unlikely	4%

INTERNET2®

COVALENCE

# Distribution of Higher Education Respondent Participation by Years

We got a good cross section of participants by the number of years they have participated in InCommon including organizations that are not participating. This data was not deduped for multiple respondents from the same institution.

Respondent Number of Years Participating in InCommon
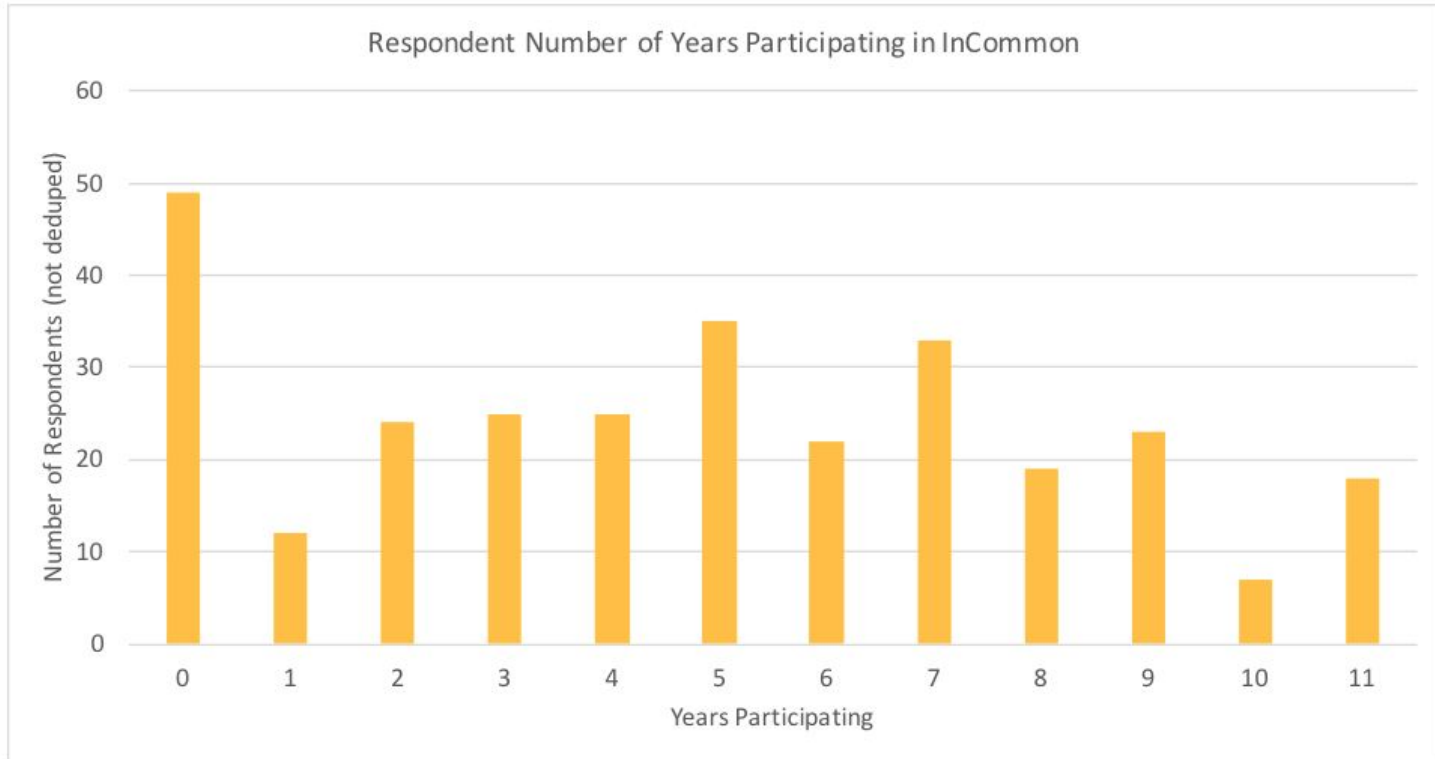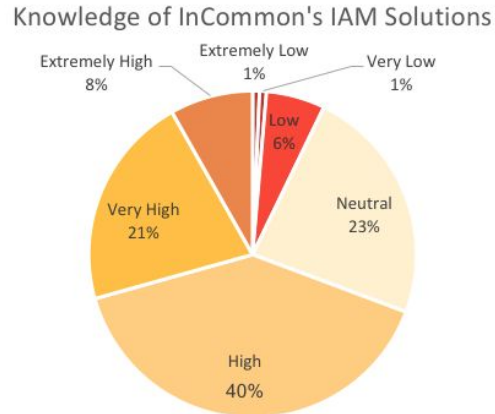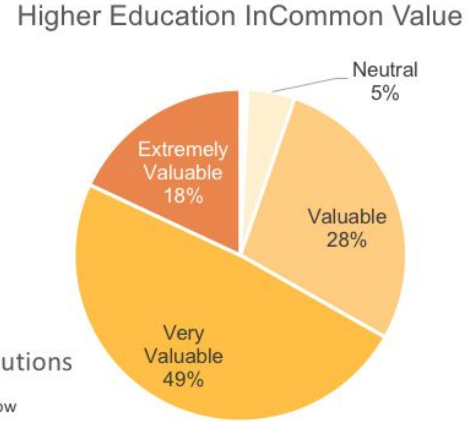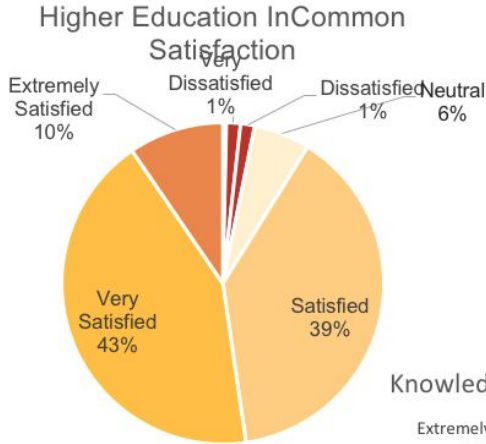
Higher Education IAM Solution Ranking

InCommon, Shibboleth, eduroam, Duo, Microsoft, and Google score High+. Shibboleth, InCommon and Duo dominate ratings above Very High.

Higher Education Ranking of IAM Solutions
(296 respondents)
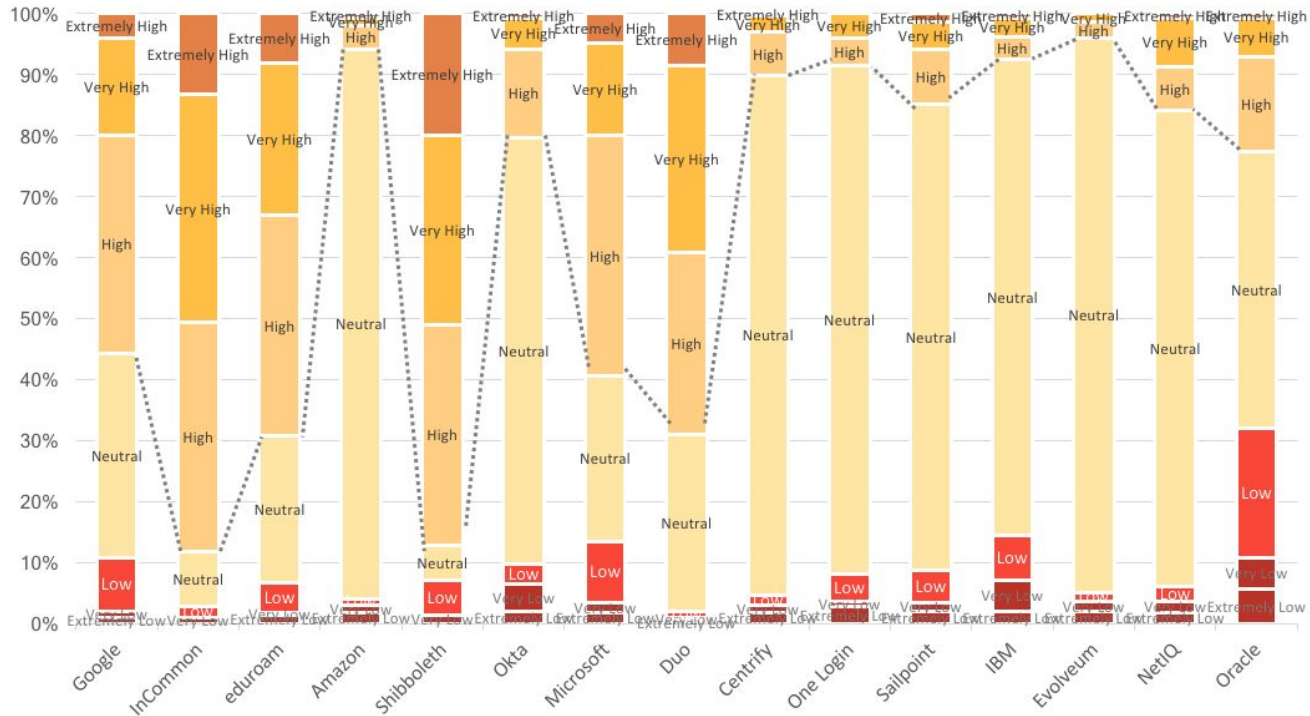
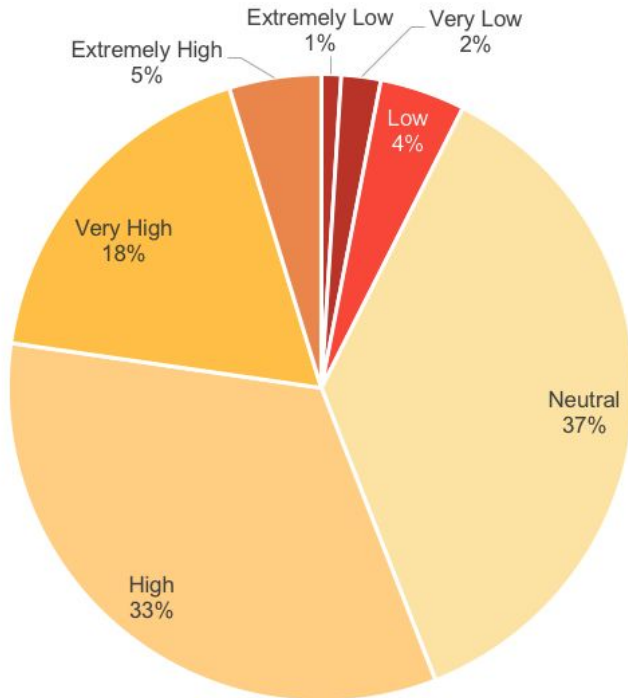# Higher Education InCommon Satisfaction and Value

Value leads satisfaction. VSAT+ is at 53% and Very Valuable+ is at 67%. Of note is that knowledge of InCommon's solutions lags satisfaction and perceived value, proof positive of the value of marketing.

Higher Education InCommon Satisfaction

Extremely Satisfied 10%
Very Dissatisfied 1%
Dissatisfied 1%
Neutral 6%
Very Satisfied 43%
Satisfied 39%

Higher Education InCommon Value

Neutral 5%
Extremely Valuable 18%
Valuable 28%
Very Valuable 49%

Knowledge of InCommon's IAM Solutions

Extremely High 8%
Extremely Low 1%
Very Low 1%
Low 6%
Very High 21%
Neutral 23%
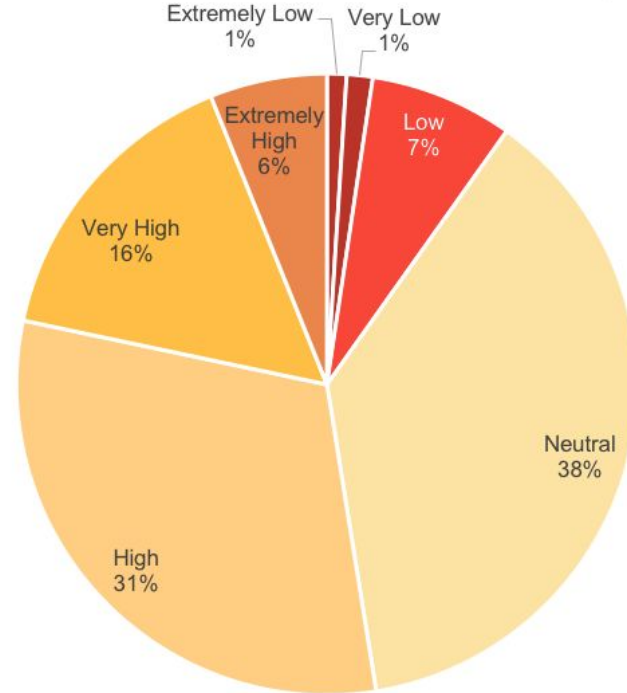High 40%

INTERNET2®

C°VALENCE

Higher Education Leadership in IAM

InCommon's leadership position is essentially the same for Google and Microsoft.
However, in both cases >40% or respondents rated InCommon neutral or less.

InCommon's Leadership in IAM compared to Microsoft

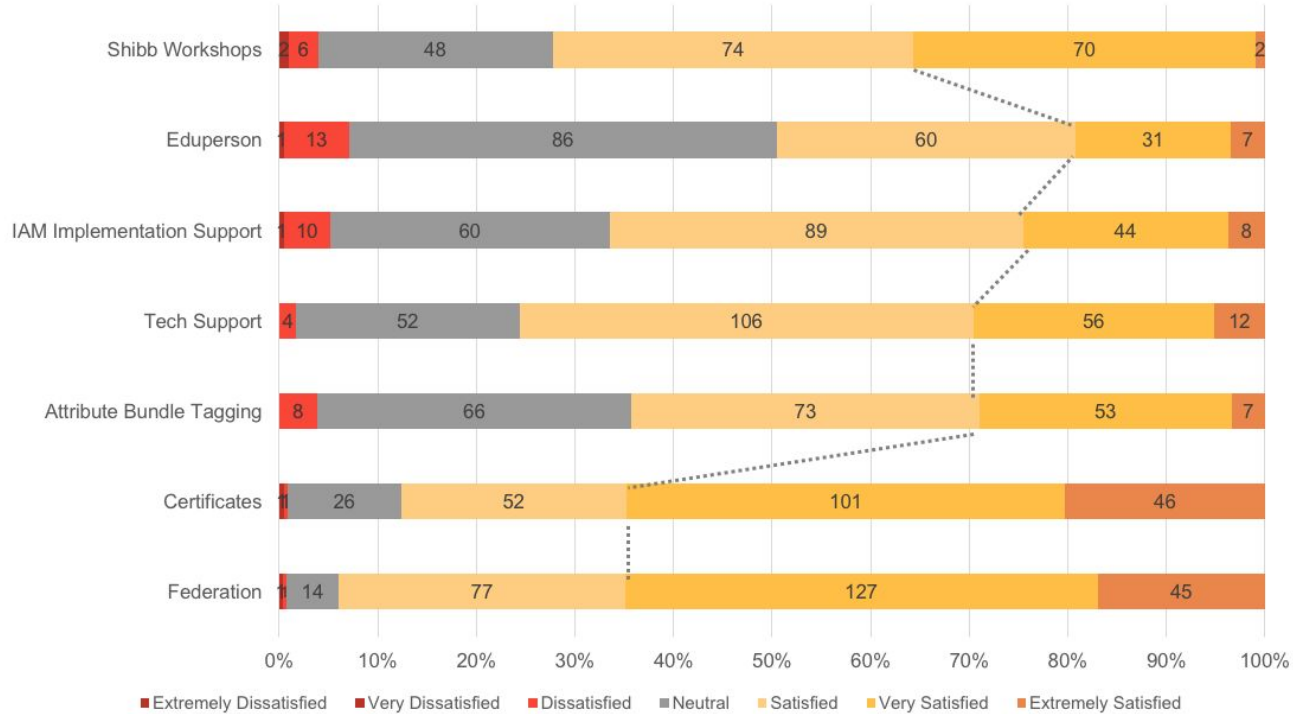- Extremely Low 1%
- Very Low 2%
- Extremely High 5%
- Low 4%
- Very High 18%
- Neutral 37%
- High 33%

InCommon's Leadership in IAM compared to Google

- Extremely Low 1%
- Very Low 1%
- Extremely High 6%
- Low 7%
- Very High 16%
- Neutral 38%
- High 31%

Higher Education Satisfaction with InCommon Services

Clearly the Federation and Certificates are the primary dimensions of VSAT+.

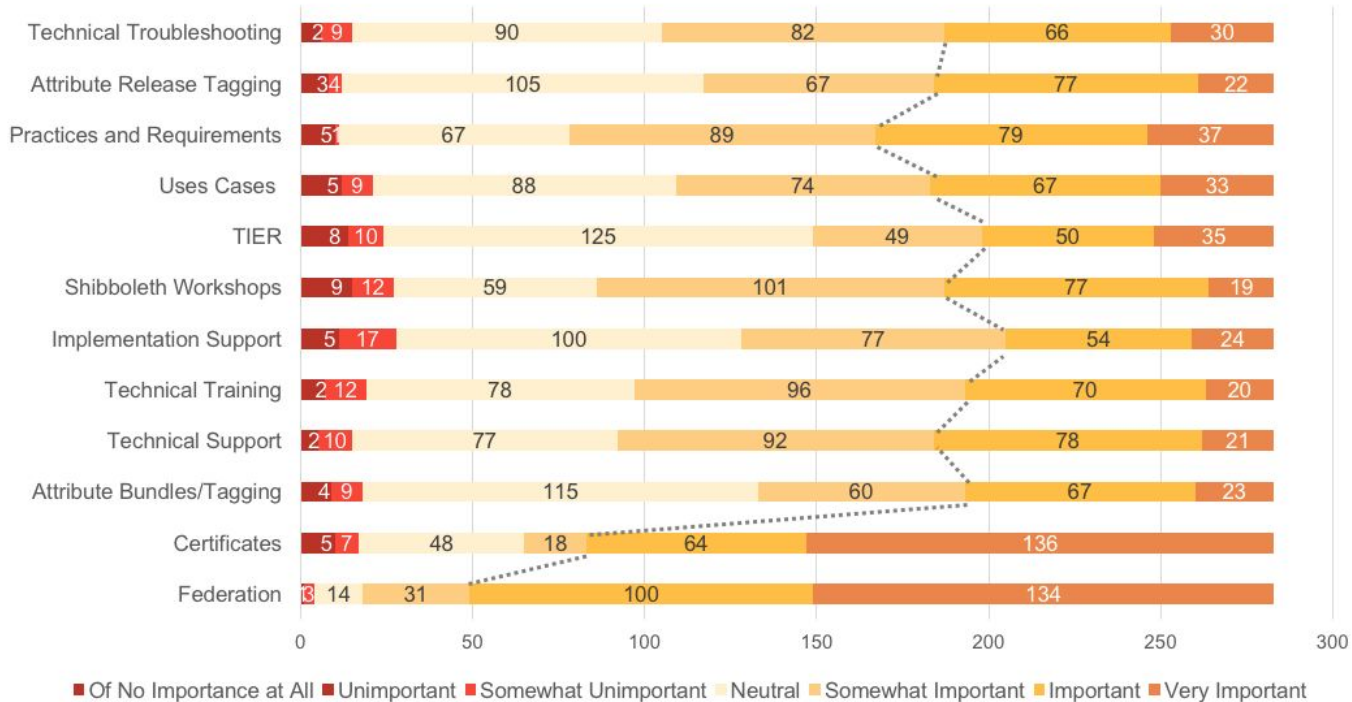## Higher Education Satisfaction with InCommon Services

Service	Values
Shibb Workshops	2, 6, 48, 74, 70, 2
Eduperson	1, 13, 86, 60, 31, 7
IAM Implementation Support	1, 10, 60, 89, 44, 8
Tech Support	4, 52, 106, 56, 12
Attribute Bundle Tagging	8, 66, 73, 53, 7
Certificates	1, 1, 26, 52, 101, 46
Federation	1, 1, 14, 77, 127, 45

Legend: ■ Extremely Dissatisfied ■ Very Dissatisfied ■ Dissatisfied ■ Neutral Satisfied Very Satisfied ■ Extremely Satisfied

INTERNET2

20

Higher Education InCommon Priorities

The federation and certificates hands down were the most important priority for respondents. Secondary priorities were all roughly even in priority with Practices and Requirements with a slight edge.

Higher Education Importance of InCommon IAM Services and Initiatives

Category	Of No Importance at All	Unimportant	Somewhat Unimportant	Neutral	Somewhat Important	Important	Very Important
Technical Troubleshooting	2	9		90	82	66	30
Attribute Release Tagging	3	4		105	67	77	22
Practices and Requirements	5	1		67	89	79	37
Uses Cases	5	9		88	74	67	33
TIER	8	10		125	49	50	35
Shibboleth Workshops	9	12		59	101	77	19
Implementation Support	5	17		100	77	54	24
Technical Training	2	12		78	96	70	20
Technical Support	2	10		77	92	78	21
Attribute Bundles/Tagging	4	9		115	60	67	23
Certificates	5	7		48	18	64	136
Federation	3	14		31	100	134	

Legend: ■ Of No Importance at All ■ Unimportant ■ Somewhat Unimportant ■ Neutral ■ Somewhat Important ■ Important ■ Very Important

Commercial ratings of IAM solutions

Shibboleth takes top honors with Commercial respondents followed closely by InCommon and to a lesser extent Google.
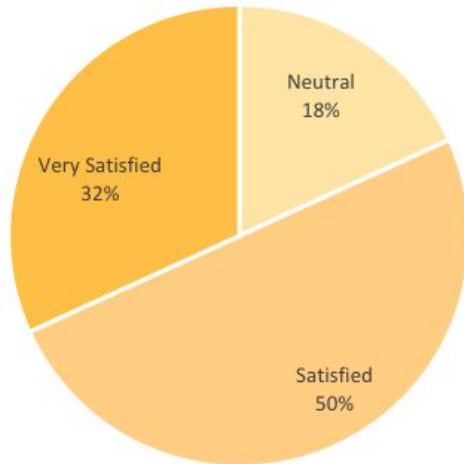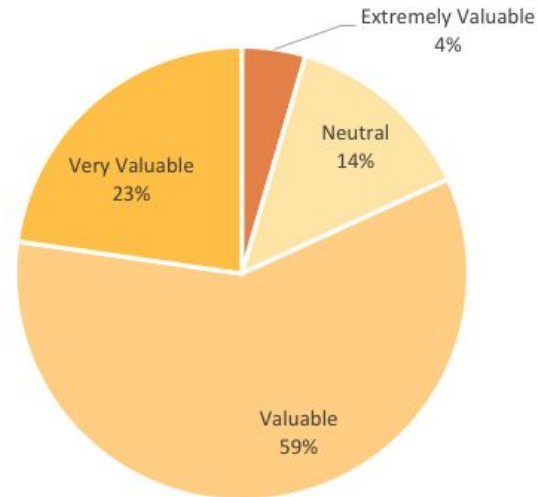

IAM Solution Ratings - Commercial
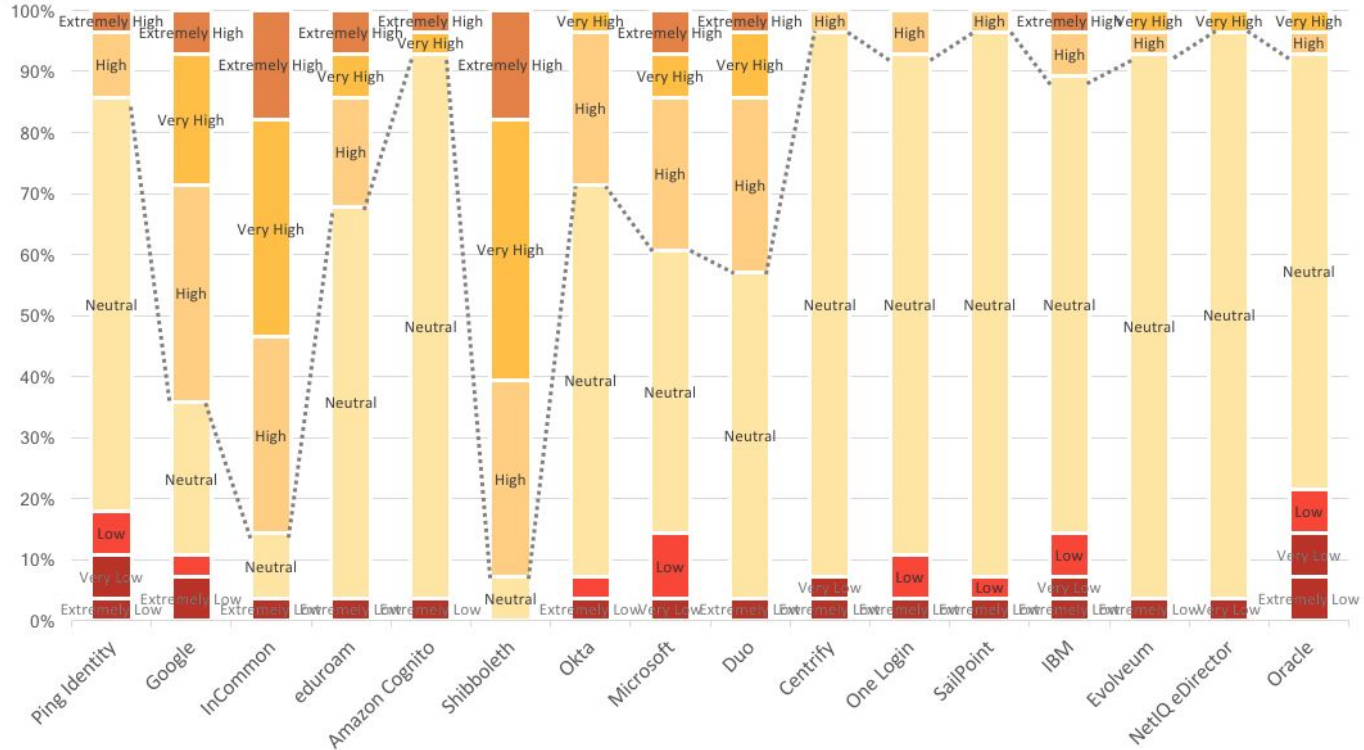
Commercial – General Satisfaction

Value leads satisfaction. A review of current research on this topic for the telecommunications sector indicates that value is often driven primarily by satisfaction.

InCommon Satisfaction - Commercial

Neutral
18%

Very Satisfied
32%

Satisfied
50%

InCommon Value - Commercial

Extremely Valuable
4%

Neutral
14%

Very Valuable
23%

Valuable
59%

INTERNET2®

Next steps

- Continue the analysis

- Extend the conversation/analysis with PAG/Steering/TCIC/TAC etc.

- Develop strategy and action plan

INTERNET2®