



InCommon
Market Segmentation Findings and Recommendations

C O VALENCE

How we got here – our approach to segmentation



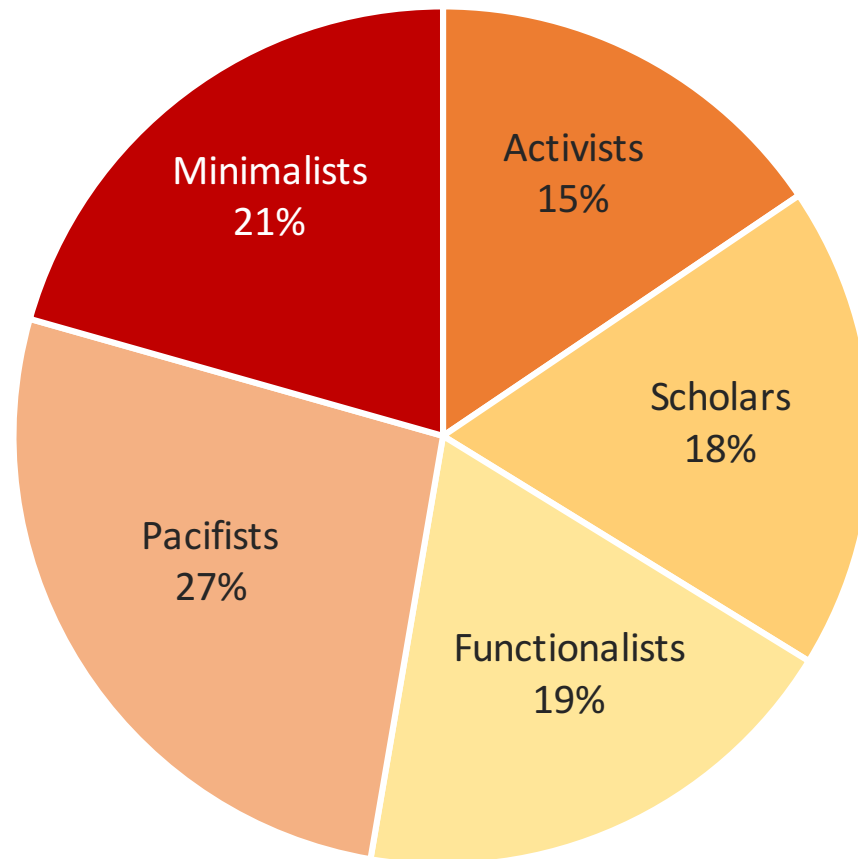
EXECUTIVE SUMMARY OF KEY FINDINGS

- 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.






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.

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



Introducing the five distinct personality segments

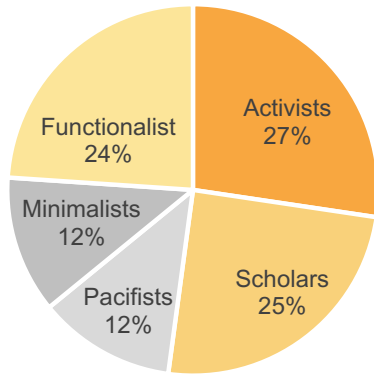
Name	Activists	Scholars	Functionalists	Pacifists	Minimalists
Picture					
Descriptive Quote	<p><i>"I love using, learning about, and sharing my knowledge of IAM with others"</i></p>	<p><i>"I am dedicated to leaning about and helping people I know with their IAM problems"</i></p>	<p><i>"It is most important that I can competently use and maintain IAM solutions on my job"</i></p>	<p><i>"IAM is something I am responsible for but it is not the primary focus of my job"</i></p>	<p><i>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"</i></p>
Incidence	15%	18%	19%	27%	21%

HIGHER EDUCATION IAM STAKEHOLDERS – 296 RESPONDENTS
PERSONALITY SEGMENTS

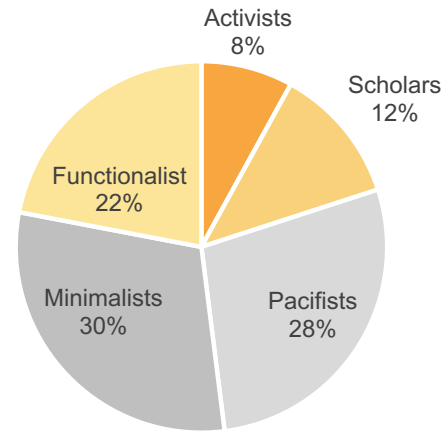
Distribution of Personality Segments Across Higher Ed Levels

Activists and Scholars are most prevalent in L1 organizations which should be no surprise since they work in large IT organizations which allows for more specialization. Surprisingly, L4 has the next largest concentration of of these top priority segments.

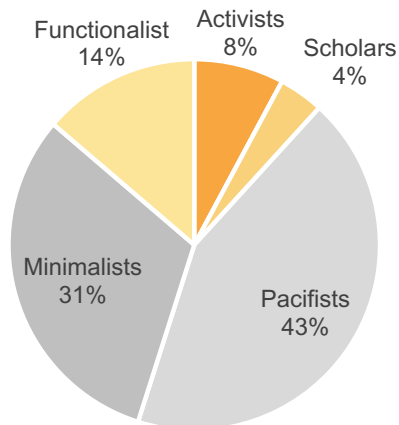
L1 Breakdown of Personality Segments



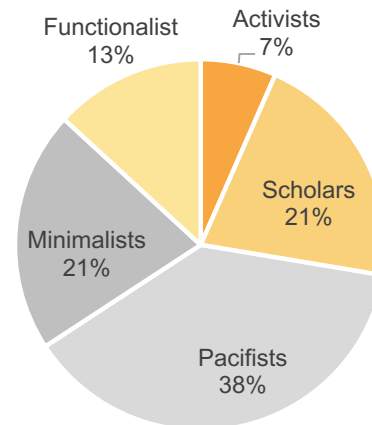
L2 Breakdown of Personality Segments



L3 Breakdown of Personality Segments



L4 Breakdown of Personality Segments



PROFILES

Activists

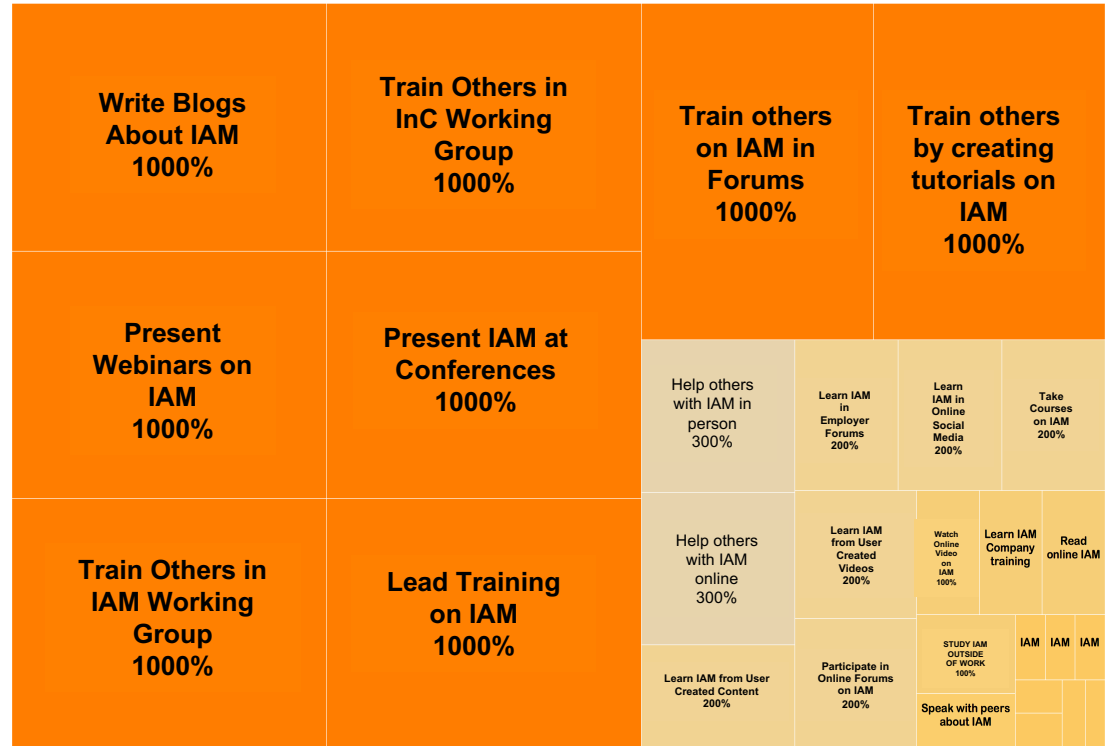


15%
incidence

“I love using, learning about, and sharing my knowledge of IAM with others online and in person”

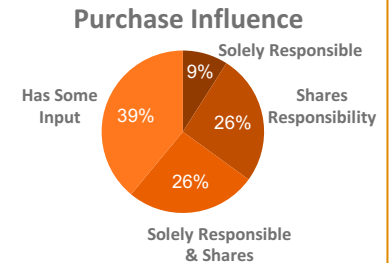
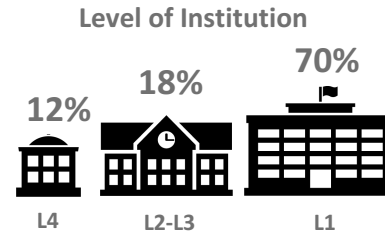
- Actively studies IAM outside of work
- Views themselves as an average adopter of new technology and staying up to date - modest
- Vocal participant in all channels about IAM
- Indexes highest on Training others and Learning about IAM
- Has responsibility in the IAM purchase process
- In an IAM management role & position

ACTIVISTS



InCommon Share
100%

InCommon Federation Share
98%



Scholars

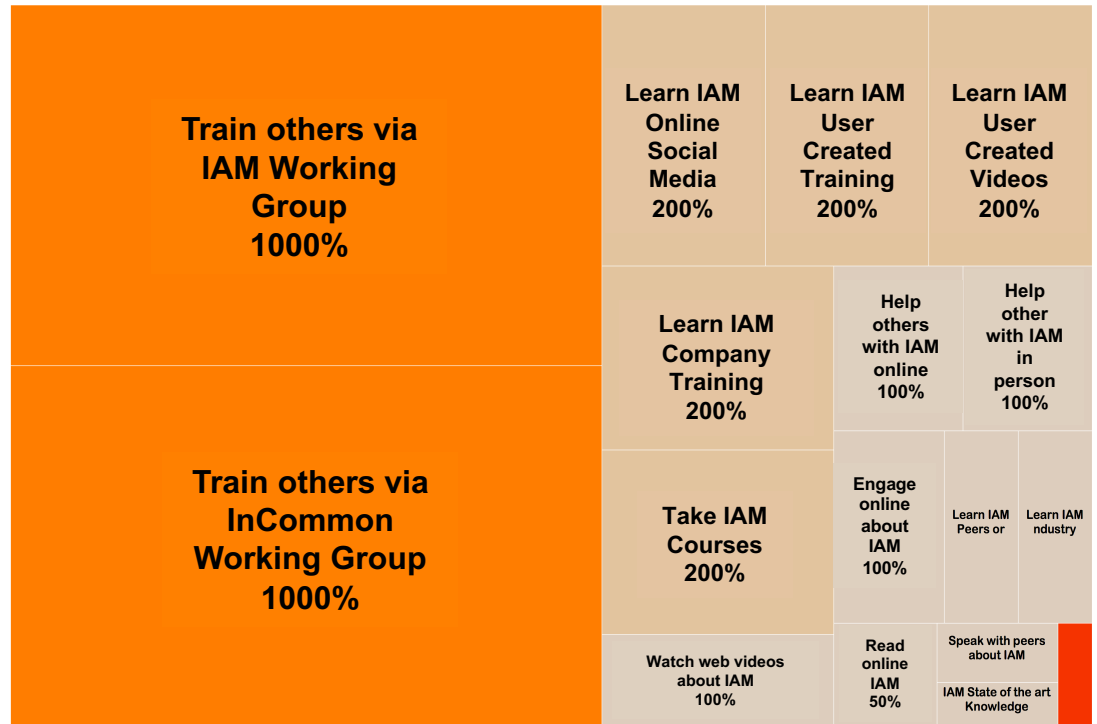


18%
incidence

“I am a valued IAM manager and expert in my organization and love to train people in small groups or one on one.”

- Somewhat cautious in adopting new technologies.
- Actively studies IAM and moderate involvement in the IAM community
- Helps peers that they know directly
- Feels moderately involved in the software purchase process at their company

SCHOLARS



InCommon Share

98%

InCommon Federation Share

89%

Level of Institution

30%



L4

15%



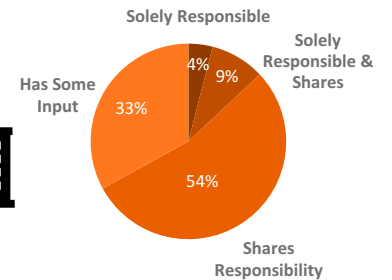
L2-L3

55%



L1

Purchase Influence



Functionalists

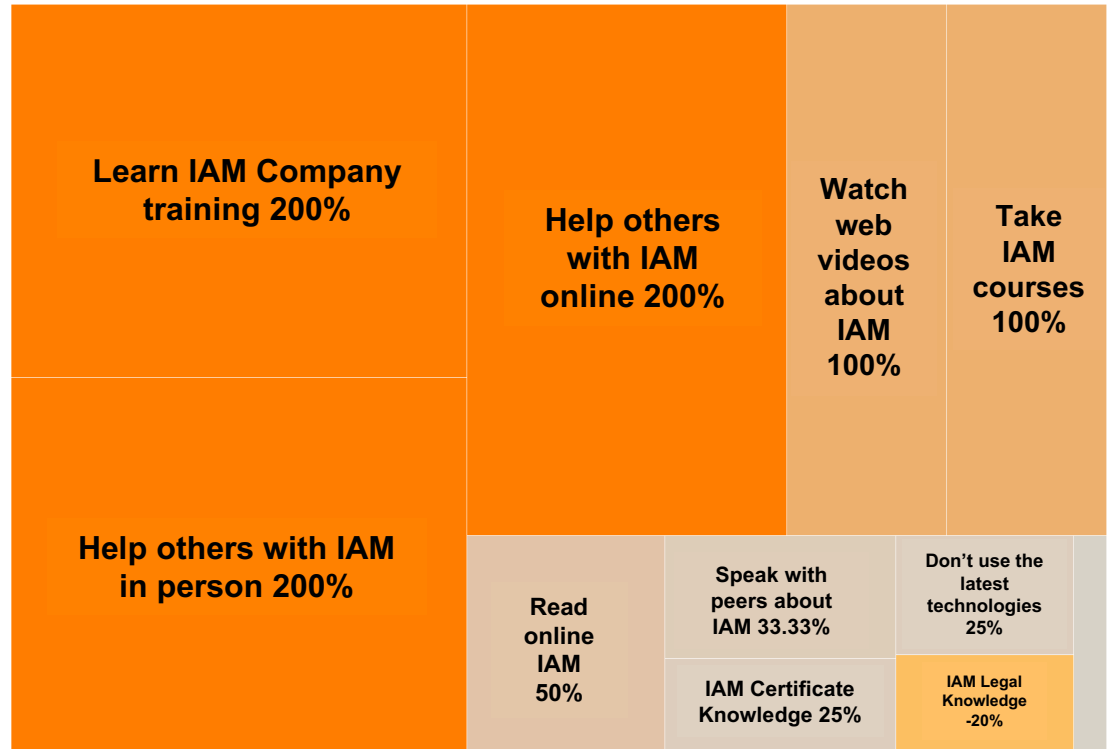


19%
incidence

“It is most important that I can competently use and maintain IAM solutions on my job”

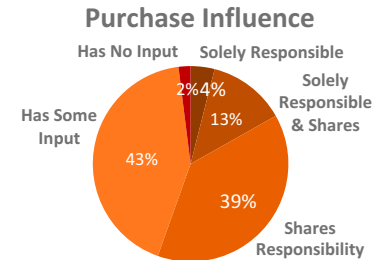
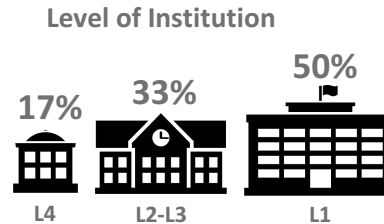
- Somewhat engaged with IAM information but mostly learns on the job
- Capable of using IAM solutions, moderate to low involvement in the IAM community
- Operationally focused
- Feels moderately involved in the software purchase process

FUNCTIONALISTS



InCommon Share
98%

InCommon Federation Share
89%



Pacifists

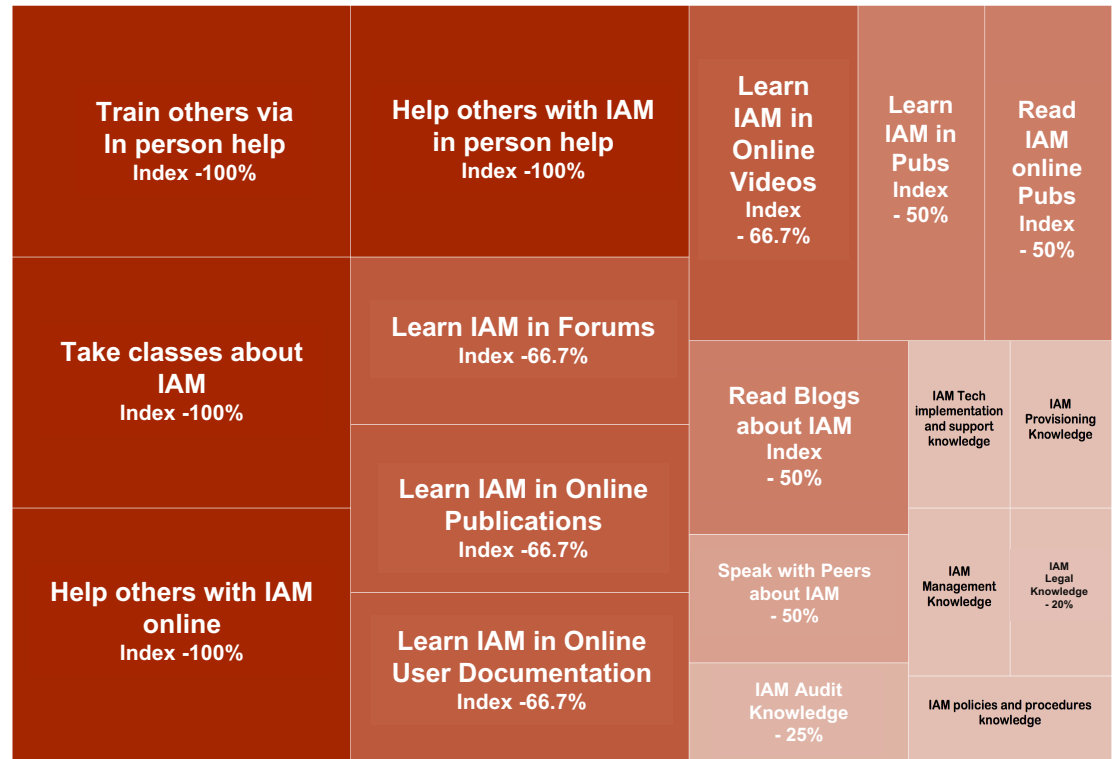


27%
incidence

“IAM is something I am responsible for but it is not the primary focus of my job”

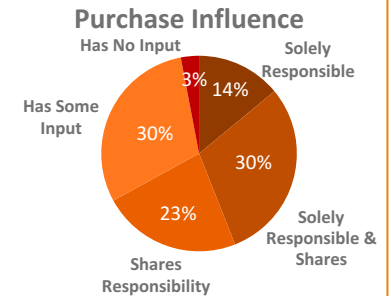
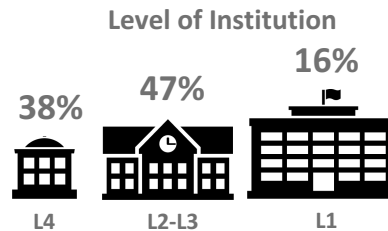
- Lowest level of IAM engagement of all NAB segments
- Works at L2-L4 predominantly
- 50% have an Executive IT or Executive Security position
- Views InCommon very favorably
- Has the lowest on average support spend of all segments
- Highest responsibility for purchase decisions of all behavioral segments

PASSIVISTS



InCommon Share
93%

InCommon Federation Share
61%



Minimalists

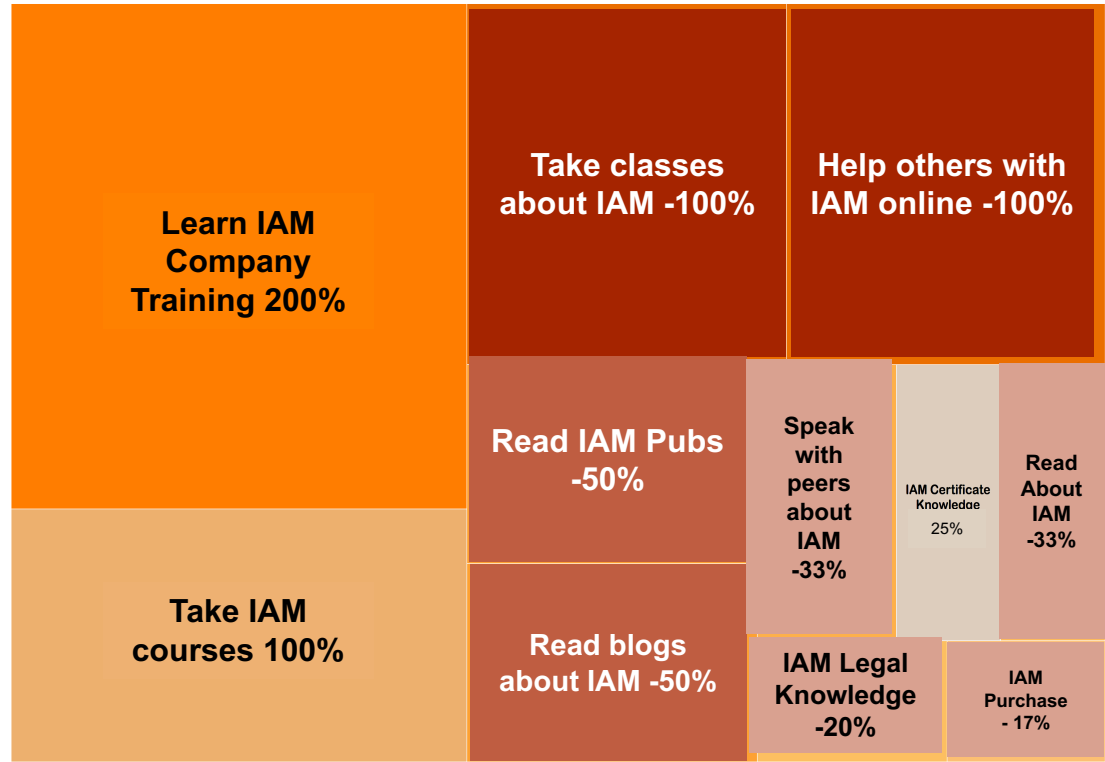


21%
incidence

“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”

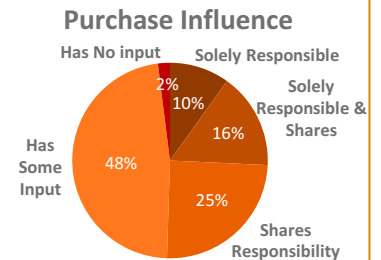
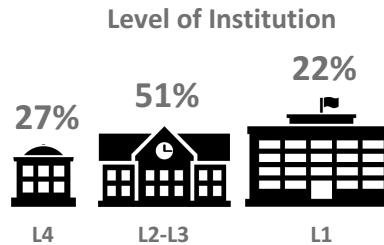
- Learns IAM through on site organization training when offered
- Does not go out of the way to learn about IAM
- Does not help others and support them as often as peers
- Knowledge about IAM is less than peers
- Has some influence on purchase decision

MINIMALISTS



InCommon Share
98%

InCommon Federation Share
80%



DEMOGRAPHICS

Higher Education Needs, Attitudes, & Behaviors

Activists

I love using, learning about, and sharing my knowledge of IAM with others online and in person

Segment Overview

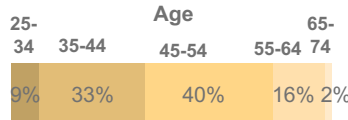


Hyper active IAM enthusiast

Passionate about IAM

Extrovert – loves affirmation

Demographics



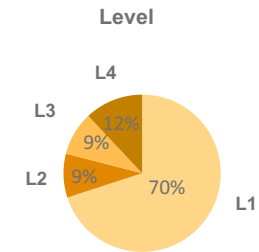
Gender

Male	85%
Female	7%
Other	2%

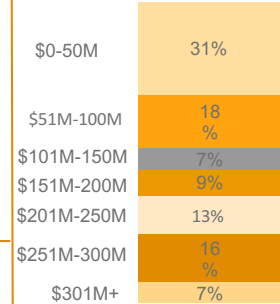
Number of People within company who support IAM Solutions

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

Participation Level



Support Spend (\$)

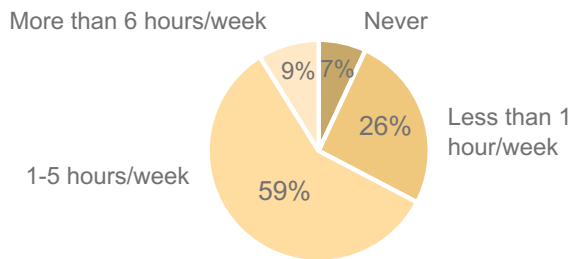


IAM Teaching and Learning Behavior

	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

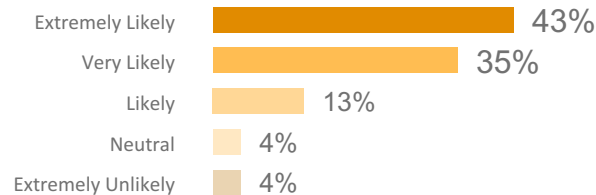
Read or Study IAM Outside of Work



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%

Likelihood to Recommend InCommon



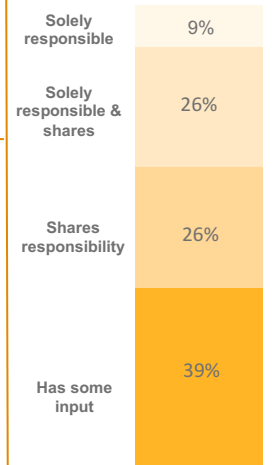
Top Job Titles

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



Higher Education Needs, Attitudes, & Behaviors Scholars

“I am a valued IAM manager and expert in my organization and love to train people in small groups or one on one.”

Segment Overview



Student of IAM

Helps people they know

Possibly introverted but seeks respect

Demographics

Age	
25-34	35-44
2%	35%
45-54	55-64
39%	18%
6%	74%

Gender

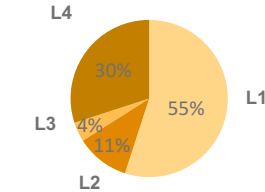
Male	80%
Female	20%

Number of People within company who support IAM Solutions

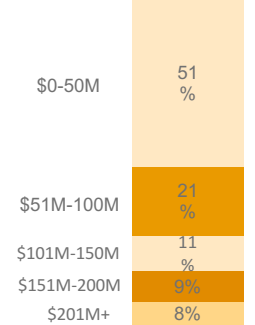
1-3 People	26%
4-6 People	30%
7-10 People	13%
Over 10 People	31%

Participation Level

Level



Support Spend (\$)



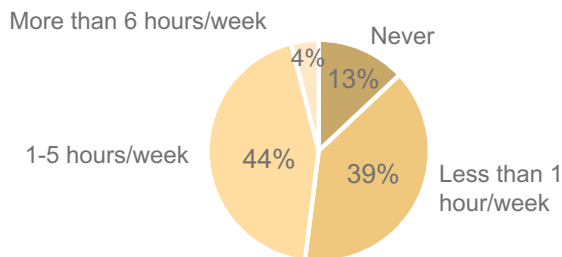
IAM Teaching and Learning Behavior

Once a Day Once Every Few Days Once a Week Once a Month

Read industry & IAM publications	5%	5%	14%	75%
Speak and help online	6%	11%	26%	57%
Learn online	9%	11%	20%	60%
Speak and help peers	21%	33%	29%	17%
Learn in person	0%	0%	50%	50%

*Percentages are aggregated then averaged

Read or Study IAM Outside of Work



IAM Training Behavior

Answer questions in-person to peers or co-workers	74%
Work in an IAM/InCommon/TIER working group or committee*	57%
Answer questions online	26%
Publish documentation/tutorials	19%
Host/lead training sessions	17%
Publish blog posts or videos	2%

Likelihood to Recommend InCommon

Extremely Likely	33%
Very Likely	39%
Likely	15%
Neutral	2%
Very Unlikely	7%
Extremely Unlikely	4%

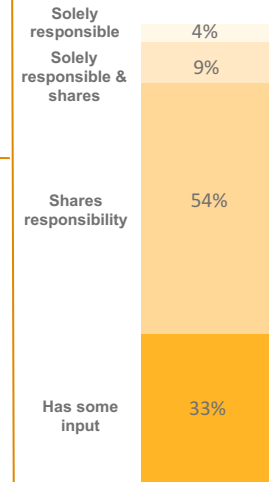
Top Job Titles

IT Management	13%
Security Execs	43%
IT Execs	30%
IT Staff	4%

IAM Roles

Manage use of IAM system	54%
Supervise IT staff	50%
Technical Implementation	48%
General Management	46%
Senior Execs	37%


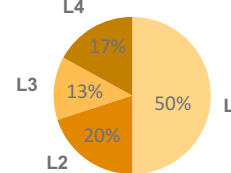
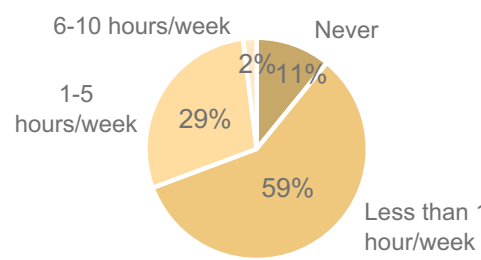
Level of Input into IAM Purchase Decisions



Higher Education Needs, Attitudes, & Behaviors

Functionalists

"It is most important that I can competently use and maintain IAM solutions on my job"

Segment Overview	Demographics	Participation Level																																																															
 <p>Moderate to low intake of IAM information</p> <p>Moderately Active in publishing</p> <p>In-person support</p>	<p>Age</p> <table border="1"> <tr> <td>25-34</td> <td>35-44</td> <td>45-54</td> <td>55-64</td> <td>65-74</td> </tr> <tr> <td>13%</td> <td>39%</td> <td>28%</td> <td>19%</td> <td>2%</td> </tr> </table> <p>Gender</p> <table border="1"> <tr> <td>Male</td> <td>96%</td> </tr> <tr> <td>Female</td> <td>6%</td> </tr> </table>	25-34	35-44	45-54	55-64	65-74	13%	39%	28%	19%	2%	Male	96%	Female	6%	<p>Number of People within company who support IAM Solutions</p> <table border="1"> <tr> <td>1-3 People</td> <td>48%</td> </tr> <tr> <td>4-6 People</td> <td>27%</td> </tr> <tr> <td>7-10 People</td> <td>14%</td> </tr> <tr> <td>Over 10 People</td> <td>11%</td> </tr> </table> <p>Level</p>  <p>Support Spend (\$)</p> <table border="1"> <tr> <td>\$0-50M</td> <td>48%</td> </tr> <tr> <td>\$51M-100M</td> <td>23%</td> </tr> <tr> <td>\$101M-150M</td> <td>11%</td> </tr> <tr> <td>\$151M-200M</td> <td>7%</td> </tr> <tr> <td>\$201M-250M</td> <td>7%</td> </tr> <tr> <td>\$251M-300M</td> <td>4%</td> </tr> </table>		1-3 People	48%	4-6 People	27%	7-10 People	14%	Over 10 People	11%	\$0-50M	48%	\$51M-100M	23%	\$101M-150M	11%	\$151M-200M	7%	\$201M-250M	7%	\$251M-300M	4%																												
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Higher Education Needs, Attitudes, & Behaviors Pacifists

"IAM is something I am responsible for but it is not the primary focus of my job"

Segment Overview



Very low IAM info engagement

No support activity

High IAM responsibility

Demographics

Age				
18-34	35-44	45-54	55-64	65-74
3%	28%	37%	21%	11%

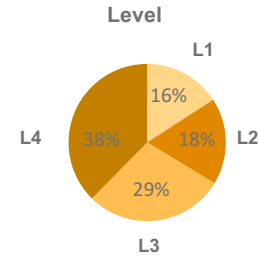
Gender

Male	86%
Female	14%

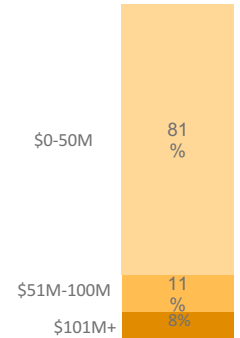
Number of People within company who support IAM Solutions

1-3 People	64%
4-6 People	27%
7-10 People	6%
Over 10 People	3%

Participation Level



Support Spend (\$)

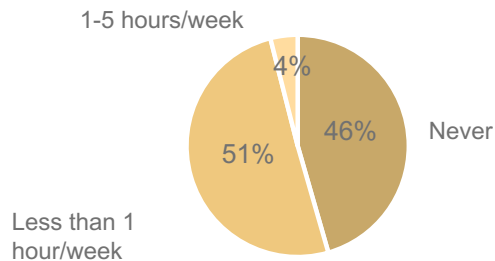


IAM Teaching and Learning Behavior

	Once a Day	Once Every Few	Once a Week	Once a Month
Read industry & IAM publications	0%	6%	6%	87%
Speak and help online	0%	0%	14%	86%
Learn online	0%	3%	11%	86%
Speak and help peers	4%	11%	33%	52%
Learn in person	0%	50%	0%	50%

*Percentages are aggregated then averaged

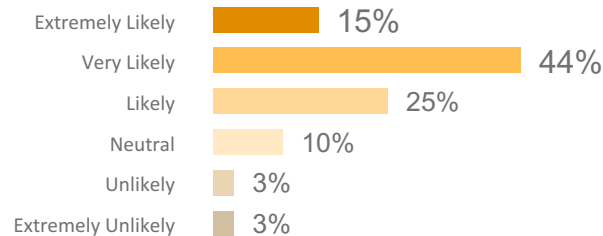
Read or Study IAM Outside of Work



IAM Training Behavior

Work in an IAM/InCommon/TIER working group or committee	0%
Answer questions in-person to peers or co-workers	0%
Answer questions online	0%
Host/lead training sessions	0%
Publish articles, blog posts, or videos	0%

Likelihood to Recommend InCommon



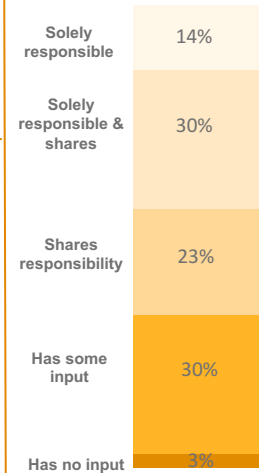
Top Job Titles

IT Execs	48%
IT Staff	24%
IT Management	18%
Security Execs	8%
Admin Execs	3%

IAM Roles

Senior Execs	52%
Technical Implementation	32%
Manage use of IAM system	29%
Supervise IT staff	25%
General Management	18%

Level of Input into IAM Purchase Decisions



Higher Education Needs, Attitudes, & Behaviors

Minimalists

"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"

Segment Overview

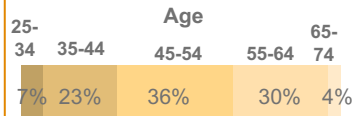


Low IAM Info Consumption

Low community engagement

Has some input to purchases of IAM

Demographics



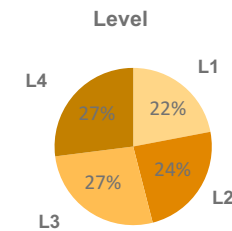
Gender

Male	96%
Female	4%

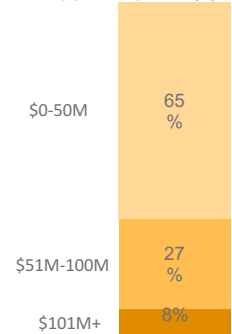
Number of People within company who support IAM Solutions

1-3 People	54%
4-6 People	34%
7-10 People	8%
Over 10 People	3%

Participation Level



Support Spend (\$)



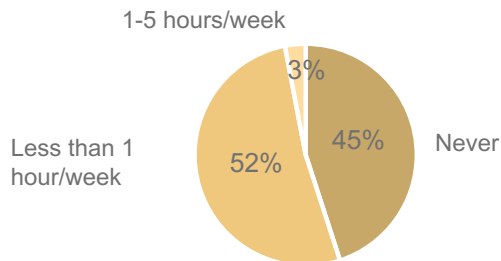
IAM Teaching and Learning Behavior

Once a Day Once Every Few Days Once a Week Once a Month

Read industry & IAM publications	0%	5%	19%	77%
Speak and help online	0%	0%	17%	83%
Learn online	5%	5%	27%	62%
Speak and help peers	8%	8%	22%	64%
Learn in person	0%	0%	0%	100%

*Percentages are aggregated then averaged

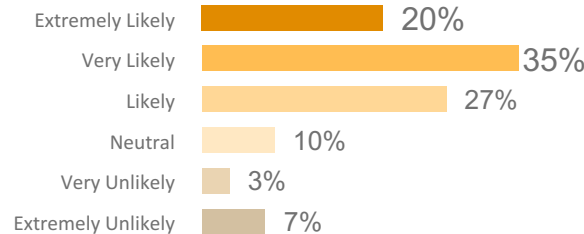
Read or Study IAM Outside of Work



IAM Training Behavior

Answer questions in-person to peers or co-workers	90%
Publish documentation/tutorials	17%
Work in an IAM/InCommon/TIER working group or committee	12%
Answer questions online	10%
Publish blog posts or videos	8%
Host/lead training sessions	3%

Likelihood to Recommend InCommon



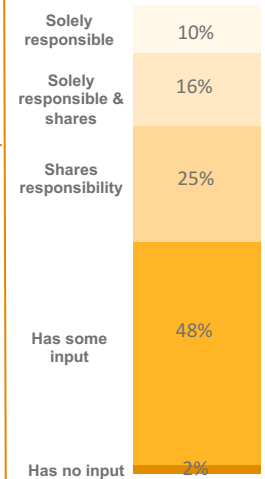
Top Job Titles

IT Staff	30%
Security Execs	28%
IT Management	21%
IT Execs	18%
Admin Execs	3%

IAM Roles

Technical Implementation	41%
Senior Execs	36%
Manage use of IAM system	33%
Supervise IT staff	30%
General Management	25%

Level of Input into IAM Purchase Decisions

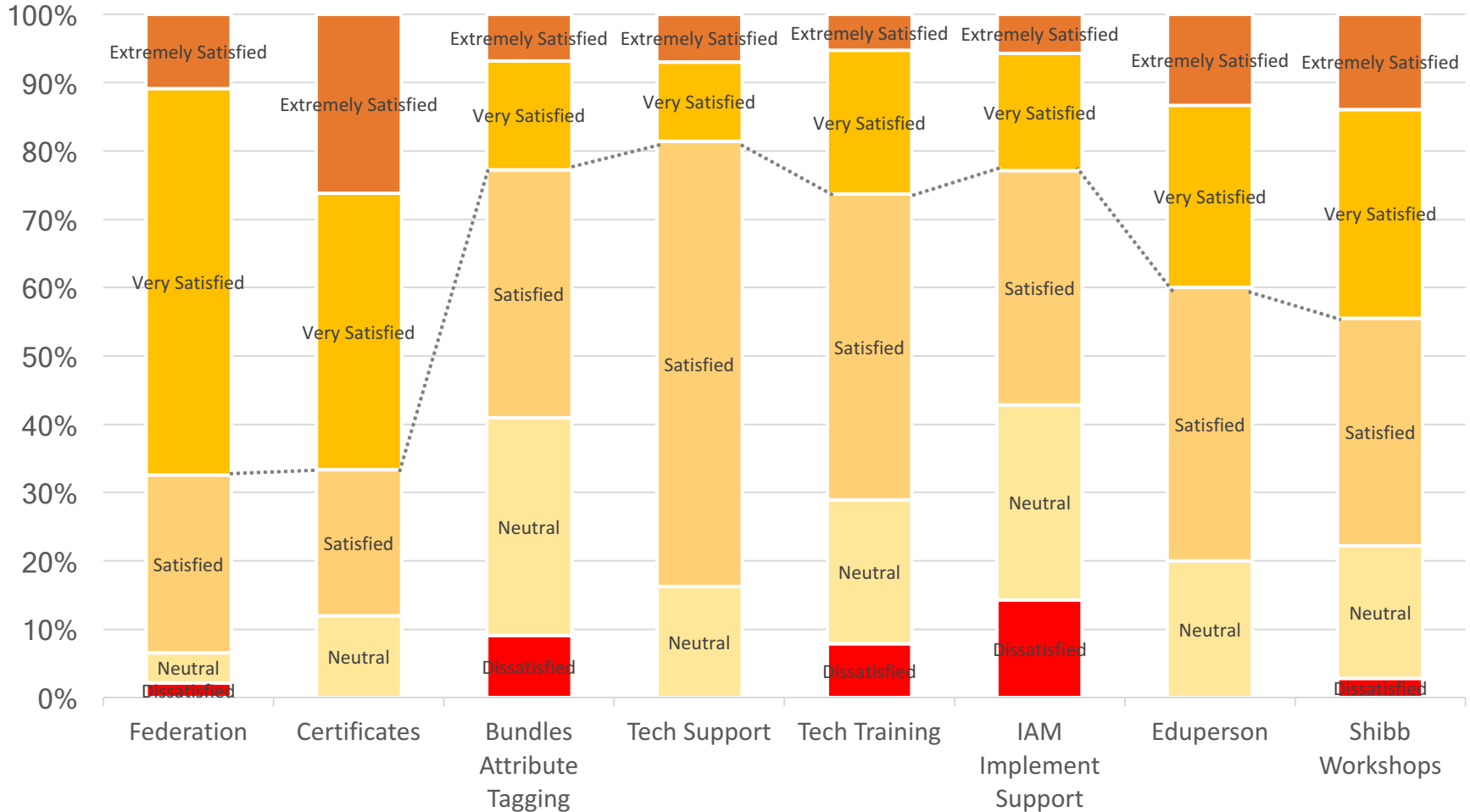


SATISFACTION, NEEDS

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.

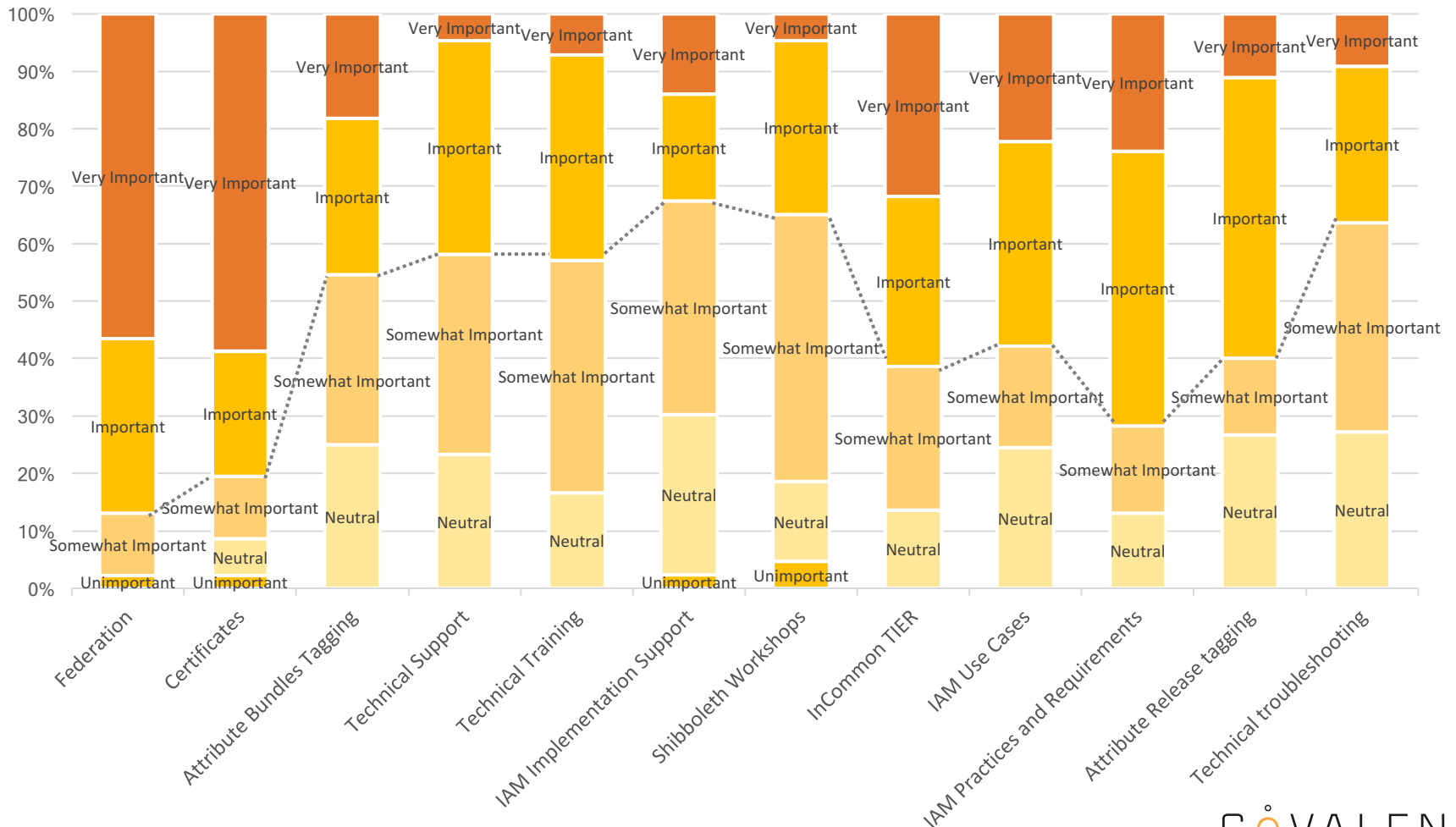
InC Service Satisfaction - Activists



Higher Education – Activist’s Needs

By far the Federation and Certificates were top priorities for Activists followed by IAM Practices and Requirements, TIER, and Attribute Tagging. Of note is how low Tech Support, Training, and Support is with this group. This may be an indicator of their level of knowledge.

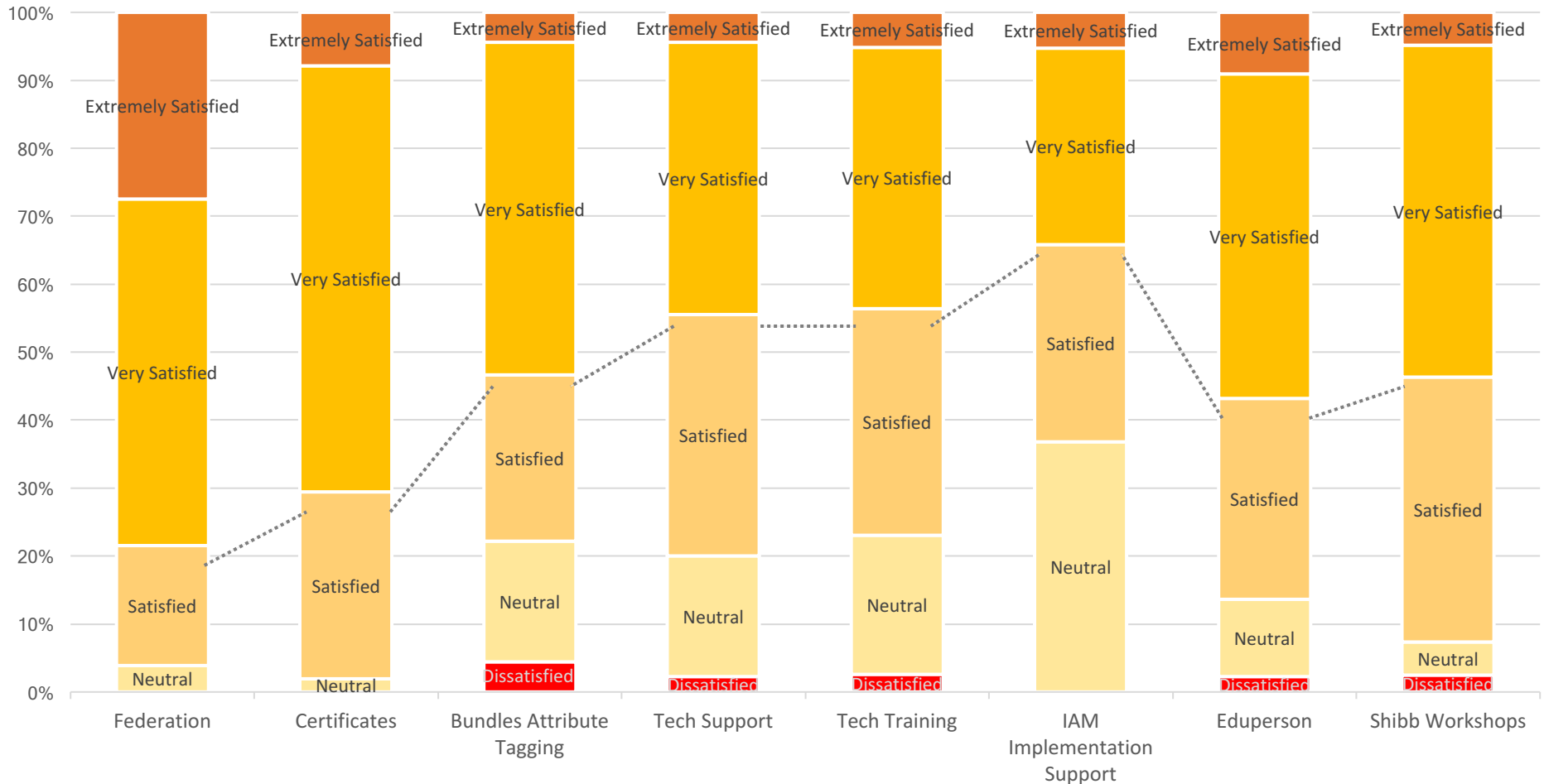
InC Priorities - Activists



Higher Education – Scholar's Satisfaction

VSAT+ runs highest with the Federation and Certificates. At SAT+ and VSAT, Eduperson and Shibb Workshops are in good shape. Implementation support indicates an opportunity in conjunction to a lesser extent Tech support and training.

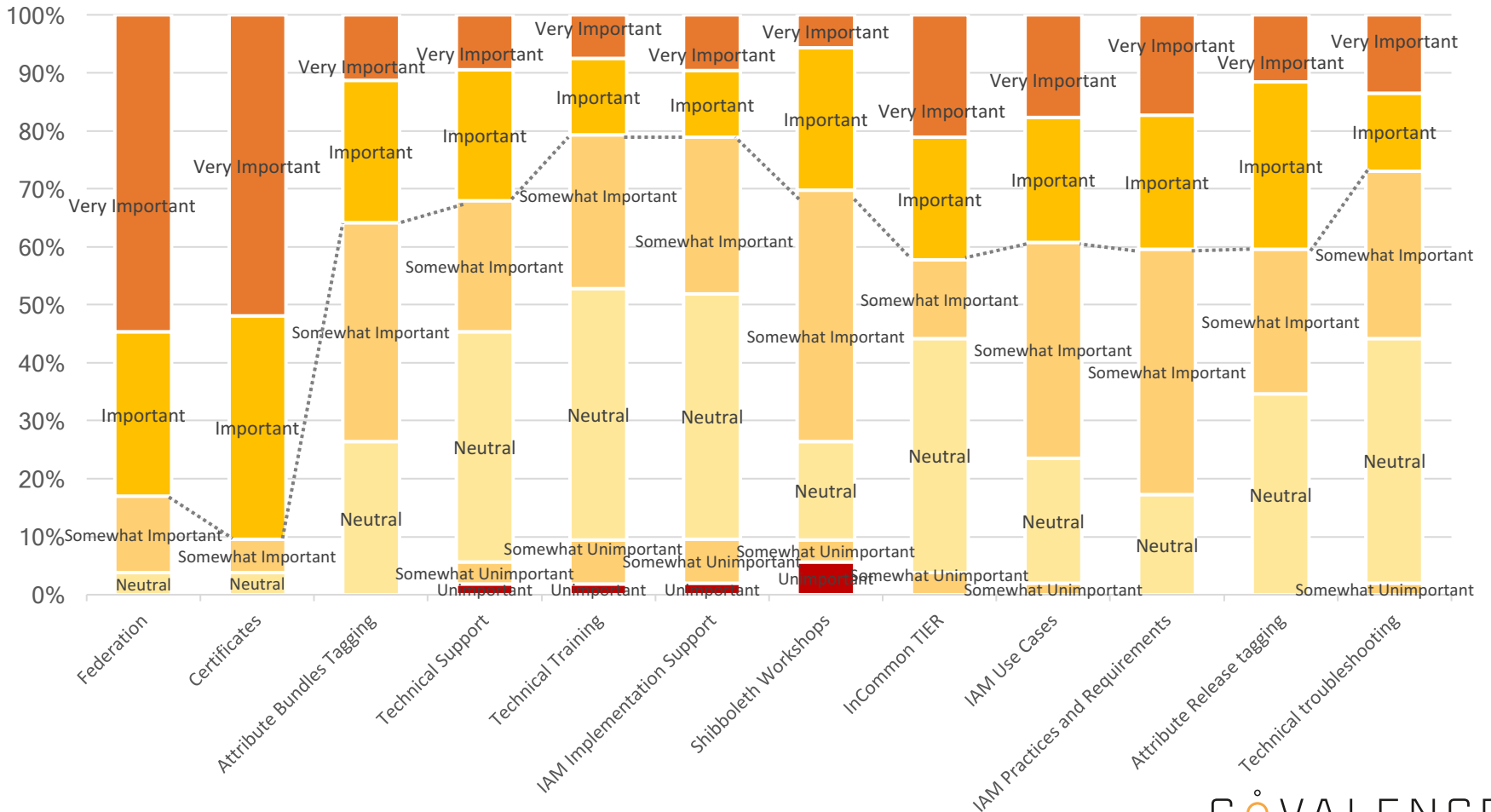
InC Service Satisfaction - Scholars



Higher Education – Scholar’s Needs

By far the Federation and Certificates were top priorities for Scholars. However after that, things fall off significantly. Of note is how low Tech Support and IAM Implementation Support is with this group with training and support in general not far behind. This may be an indicator of their level of knowledge.

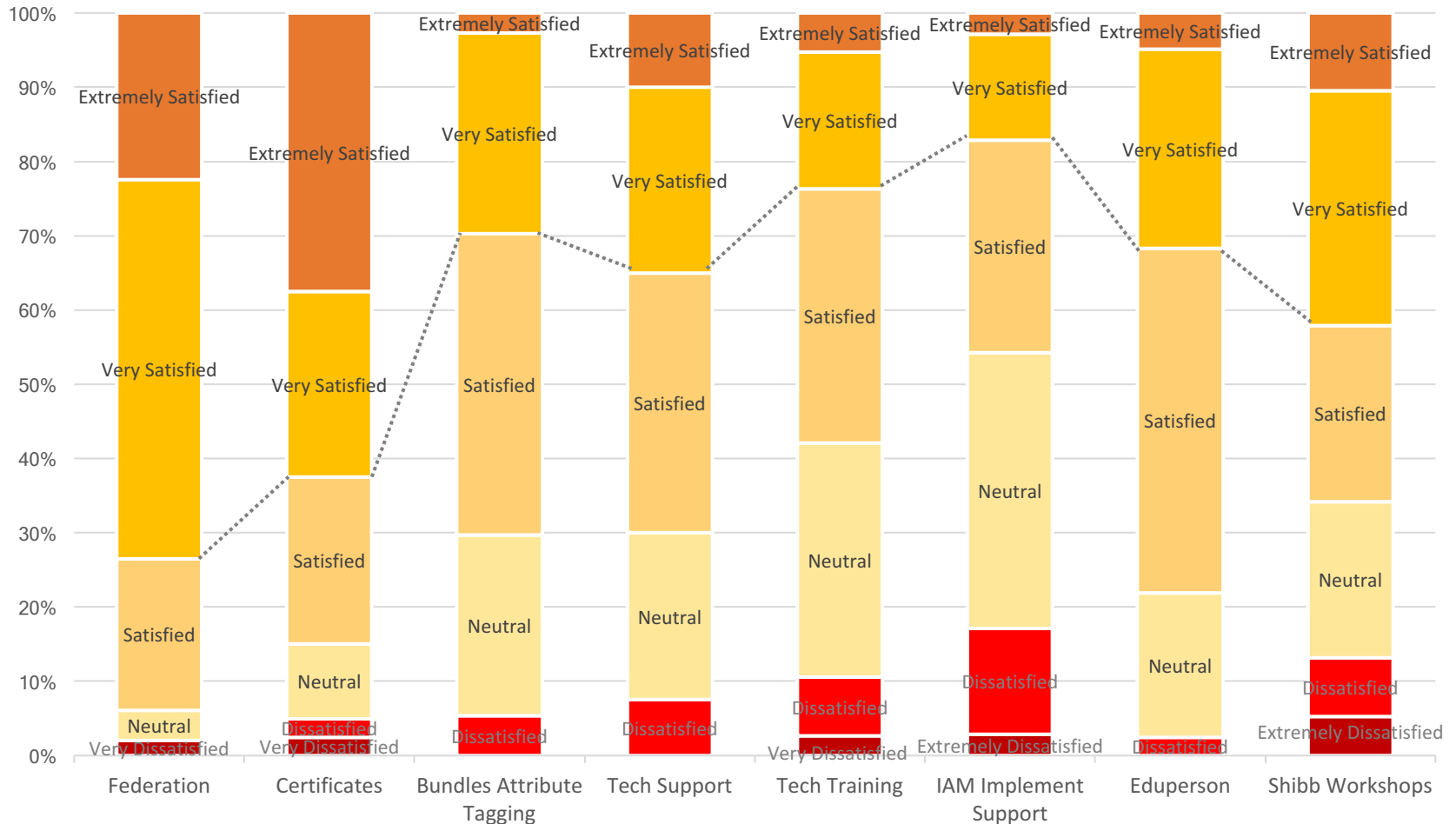
InC Priorities - Scholars



Higher Education – Functionalist's Satisfaction

VSAT+ runs highest with the Federation and Certificates. IAM implementation support and Shibboleth workshops are areas for improvement with this segment.

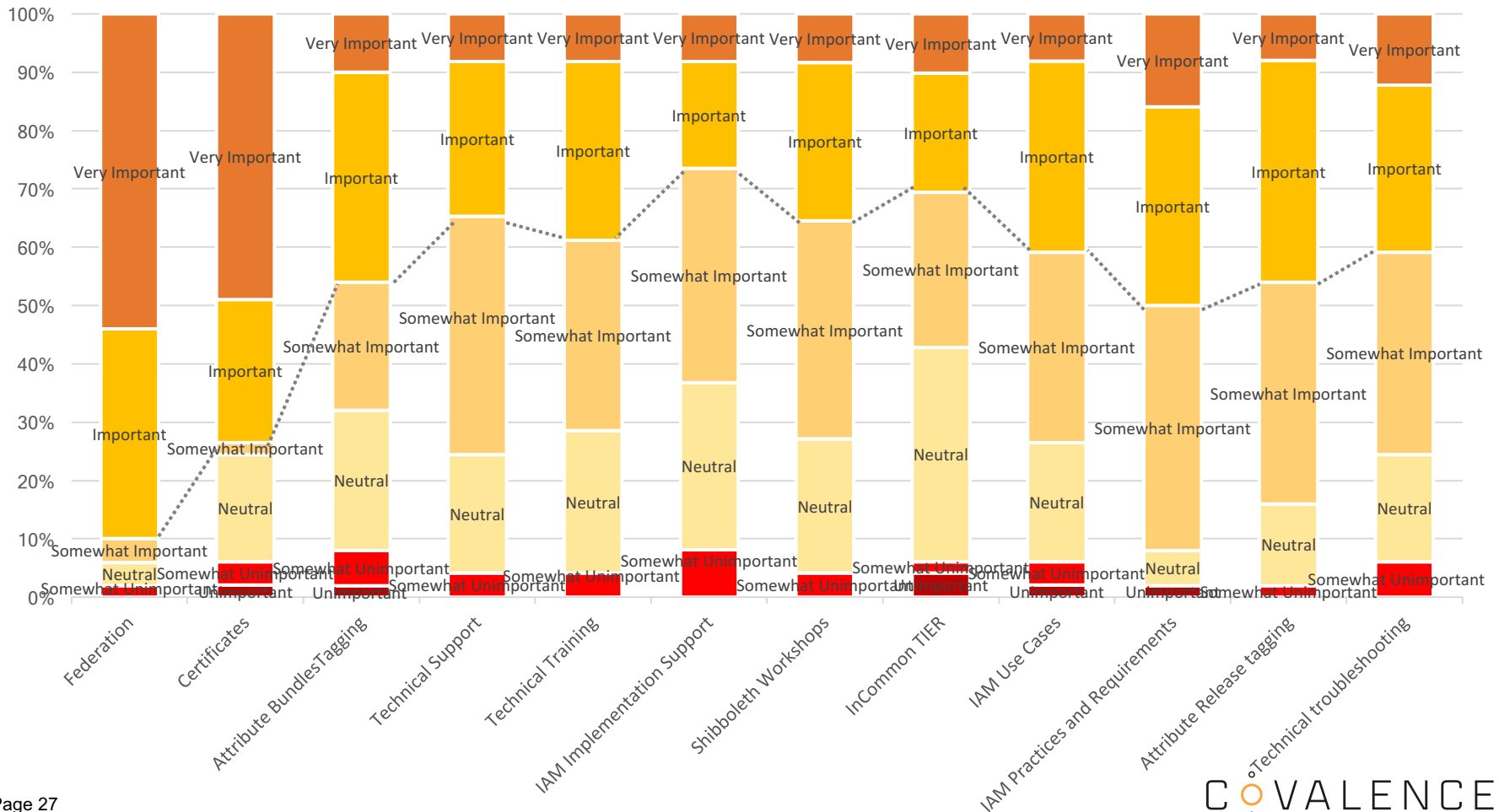
InC Service Satisfaction - Functionalists



Higher Education – Functionalist’s Needs

By far the Federation and Certificates were top priorities for Functionalists followed at a distance by IAM Practices and Requirements and Attribute Tagging. Of note is how low Implementation Support is as a need but its attribute as a source of pain on the previous slide.

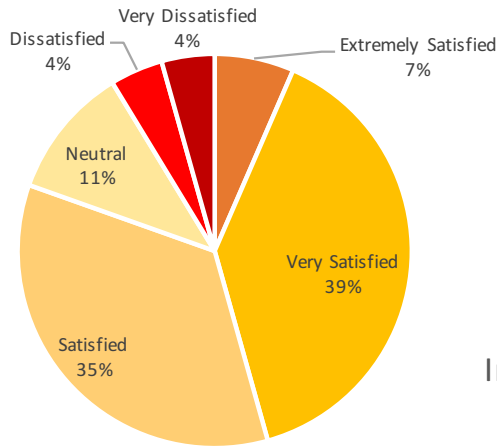
InC Priorities - Functionalists



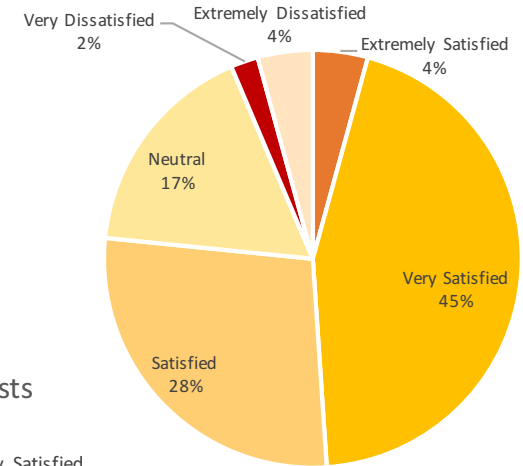
Higher Education – Pacifist’s Satisfaction

Pacifists index highest on satisfaction with InCommon by far, followed by Internet2 and then by NET+. This group skews more to L3 and L4. InCommon value exceeds its satisfaction.

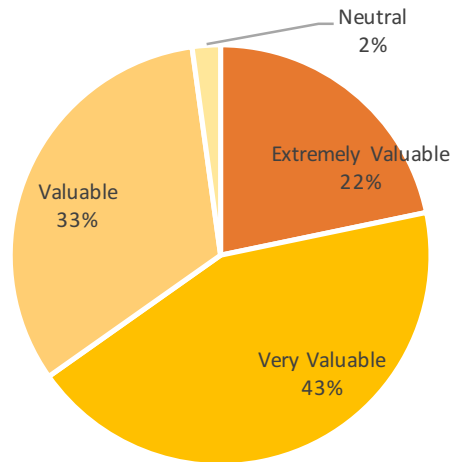
InCommon Satisfaction - Pacifists



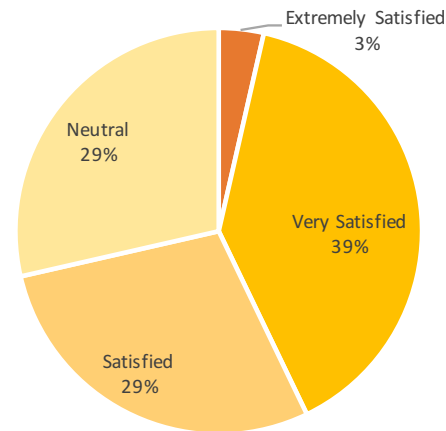
I2 Satisfaction - Pacifists



InC Value - Pacifists



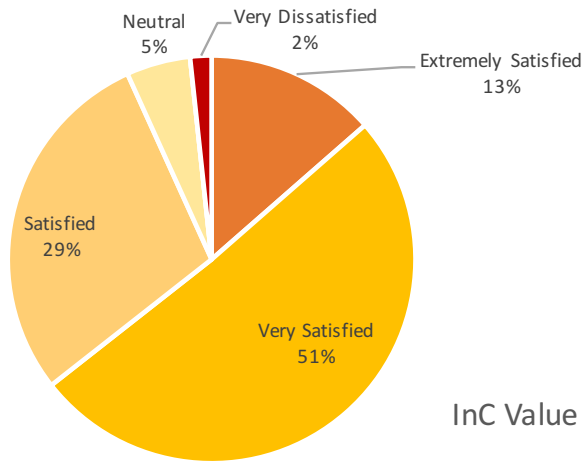
NET+ Satisfaction - Pacifists



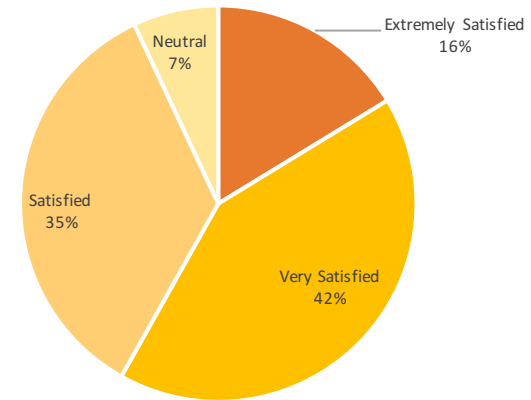
Higher Education – Minimalist’s Satisfaction

Minimalists index higher on satisfaction with Internet2, followed closely by InCommon and then by NET+. InCommon Value tracks satisfaction with this segment.

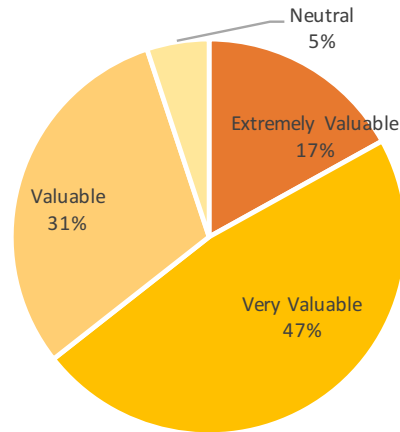
InCommon Satisfaction - Minimalists



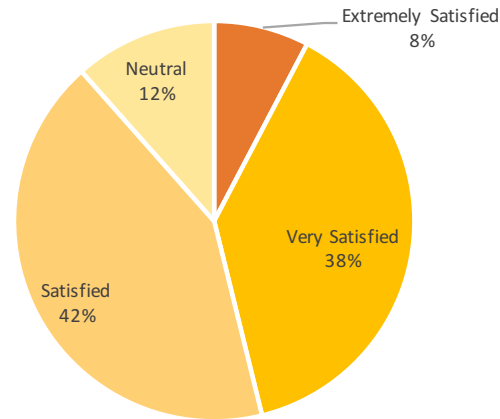
I2 Satisfaction - Minimalists



InC Value - Minimalists



NET+ Satisfaction - Minimalists



Food for thought

- The combination of activists and scholars are important for the current and future success of InCommon activities.
- Can activists and scholars be differently engaged/leveraged to close knowledge and action gaps among functionalists and minimalists?
 - ▶ Is there an opportunity for Internet2 to partner with EDUCAUSE to develop a supporting community for functionalists and minimalist?
- How can we get a keen sense of what is meant by “Identity as Service” ?
- Are Google and Microsoft threats? Or an opportunity to leverage “commodity” or general purpose IAM capabilities for the purposes of serving the challenges specific to supporting education and research?
- Value leading satisfaction – challenges to be overcome with prioritization, speed of execution, scope of services, and expectations management