

# THE GLOBAL MARKET FOR ENTERPRISE TABLETS

Assessing the Opportunity for Slate Tablets and 2-in-1 Devices to Support Enterprise and Government Workflows

EXECUTIVE BRIEF



VDC|Research  
Insights for the Connected World

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# INSIDE THIS REPORT

This report covers the overall market opportunity for rugged and consumer-grade tablets and 2-in-1 devices used to support mobile enterprise line of business (LoB) applications. Specifically, this report primarily focuses on the enterprise LoB and industry-specific subset of the overall tablet and 2-in-1 opportunity. For this subset, examples of end users whose applications often rely on tablets include factory workers, warehouse workers, field service technicians, police officers, EMTs, nurses/clinicians, flight-line aircraft personnel, and many others. This report includes market sizing and forecasts for rugged and consumer-grade devices. It also breaks down market opportunity for tablets by region and industry. Additionally, this report analyzes current trends driving investments in tablets and 2-in-1 devices while providing future outlooks and insights for mobile hardware vendors.

## WHAT QUESTIONS ARE ADDRESSED?

- > What is the outlook for enterprise and government-dedicated tablets?
- > What is the relative opportunity by regional market, industry, and application environment?
- > What are the primary device functionality requirements by industry and application environment?
- > What is the opportunity for rugged and consumer-grade 2-in-1 devices?
- > Which vendors lead the market?

## WHO SHOULD READ THIS REPORT?

The target audience for this report is decision-makers within marketing, product development, and sales/business development roles at mobile hardware OEMs as well as system integrators, value-added resellers, and distributors. In addition, end users within enterprise mobility purchasing, specification, and/or support responsibilities would benefit from reading this report.

## VENDORS LISTED IN THIS REPORT

- > Apple
- > BARTEC
- > Dell
- > Durabook
- > Getac
- > Google
- > Handheld Group
- > Juniper Systems
- > Lenovo
- > Microsoft
- > MobileDemand
- > Panasonic
- > RuggON
- > Samsung
- > Zebra

# Contents

## Inside This Report

### Executive Summary

### Key Findings

### Global Market Overview

### Regional Forecasts

The Americas

Europe, the Middle East, and Africa (EMEA)

Asia-Pacific (APAC)

### Comparative Forecast by Economic Area

#### Forecasts by Sector

Retail

Professional Services

Utilities

Telecommunications/Cable

Transportation/Distribution/DSD

Industrial/Manufacturing

Government

#### Forecast by Major Deployment Environment

Manufacturing

Warehouse/DC

Retail Shop Floor

Field Service/Sales

Government - Public Safety

Government - Military

Government – Non-Military

### Device Trends

Operating System

Rugged Tablets

Consumer-Grade Tablets

WAN Connectivity

2-in-1 Devices

Ruggedness

### Vendor Shares

### Vendor Comparisons

# List of Exhibits

Exhibit 1	Global Rugged Tablet Revenue
Exhibit 2	Global Rugged Tablet Volume
Exhibit 3	Global Consumer-Grade Tablet (including slate and 2-in-1 devices) Forecast Supporting Line of Business Applications
Exhibit 4	Average Enterprise Tablet Price (Dollars)
Exhibit 5	Americas Rugged Tablet Forecast Supporting Line of Business Applications
Exhibit 6	Americas Rugged Tablet Forecast Supporting Line of Business Applications
Exhibit 7	Americas Consumer-Grade Tablet (including slate and 2-in-1 detachable devices) Forecast Supporting Line of Business Applications
Exhibit 8	Current and Forecast Total Americas Rugged Slate Tablet Shipments by Country
Exhibit 9	EMEA Rugged Tablet Forecast Supporting LoB Applications
Exhibit 10	EMEA Rugged Tablet Forecast Supporting LoB Applications
Exhibit 11	EMEA Consumer-Grade Tablet (including slate and 2-in-1 detachable devices) Forecast Supporting Line of Business Applications
Exhibit 12	Current and Forecast Total Rugged Slate Tablets for EMEA by Country
Exhibit 13	APAC Rugged Tablet Forecast Supporting LoB Applications
Exhibit 14	APAC Rugged Tablet Forecast Supporting LoB Applications
Exhibit 15	APAC Consumer-Grade Tablet (including slate and 2-in-1 detachable devices) Forecast Supporting Line of Business Applications
Exhibit 16	Current and Forecast Total Rugged Slate Tablets for APAC by Country
Exhibit 17	Current and Forecast Worldwide Fully Rugged Slate Tablet Form Factor Computer Shipments for Consumption by Industries/Sectors
Exhibit 18	Current and Forecast Worldwide Semi-Rugged Slate Tablet Form Factor Computer Shipments for Consumption by Industries/Sectors
Exhibit 19	Worldwide Enterprise and Government Tablet Shipments (CORPORATE LIABLE ONLY) by Major Industries/Sectors
Exhibit 20	Current and Forecast Global Total Rugged Slate Tablet Shipments by Operating System
Exhibit 21	Current and Forecast Global Consumer-Grade Tablet Shipments by Operating System
Exhibit 22	Rugged Slate Tablet Shipments by Display Size
Exhibit 23	Current and Forecast Consumer-Grade Slate Tablet Shipments by Display Size (Units)
Exhibit 24	Enterprise WAN Activation for Rugged Slate Tablets
Exhibit 25	Current and Forecast Rugged 2-in-1 Devices
Exhibit 26	Worldwide Vendor Shipments and Shares of Rugged Slate Tablet Computers by Ruggedness
Exhibit 27	Q2 2018 Worldwide Vendor Shipments and Shares of Rugged Slate Tablet Computers by Region

# EXECUTIVE SUMMARY

The global market for tablets has changed significantly over the past several years. While consumer demand for tablets has largely petered, the opportunity in the enterprise—in particular for ruggedized devices—remains strong. Tablet use cases are emerging across most sectors, supporting a wide variety of applications, in particular in customer or asset-facing workflows.

The competitive environment is increasingly active with new entrants and acquisitions altering the landscape. At least seven companies now offer 2-in-1 devices, with at least three providing rugged 2-in-1 devices. Zebra Technologies' Acquisition of Xplore has seen the company leverage tablets to extend Zebra's reach into non-traditional market segments. Some tablet providers such as MobileDemand have successfully pushed into retail for customer-facing use cases. The use of non-rugged "consumer" tablets in the enterprise is pervasive with Apple, Microsoft, and Samsung leading.

## KEY FINDINGS

- > The rugged slate tablet market is expected to reach \$882.3M by 2023.
- > The rugged tablet market remains very much aligned with the PC market, with Windows 10 and x86 processor architectures dominating. However, Android is making in-roads across multiple industries.
- > 10-12.9" devices are still the norm for organizations utilizing rugged tablets.  
Android is becoming far more trusted and prevalent in the enterprise.

# ABOUT THE AUTHORS



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**Spencer Gisser** is a market research and consulting professional within VDC's Enterprise Mobility and Connected Devices practice, supporting both syndicated research and custom engagements. Prior to joining VDC, Spencer conducted in-depth market analysis at cybersecurity company Covata. Spencer also founded and moderates */r/Security*, a 32,000-person online forum enabling the cybersecurity industry. Spencer holds a B.A. in Government from Harvard University.

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David Krebs

**David Krebs** has more than 10 years of experience covering the markets for enterprise and government mobility solutions, wireless data communication technologies, and automatic data-capture research and consulting. David focuses on identifying the key drivers and enablers in the adoption of mobile and wireless

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