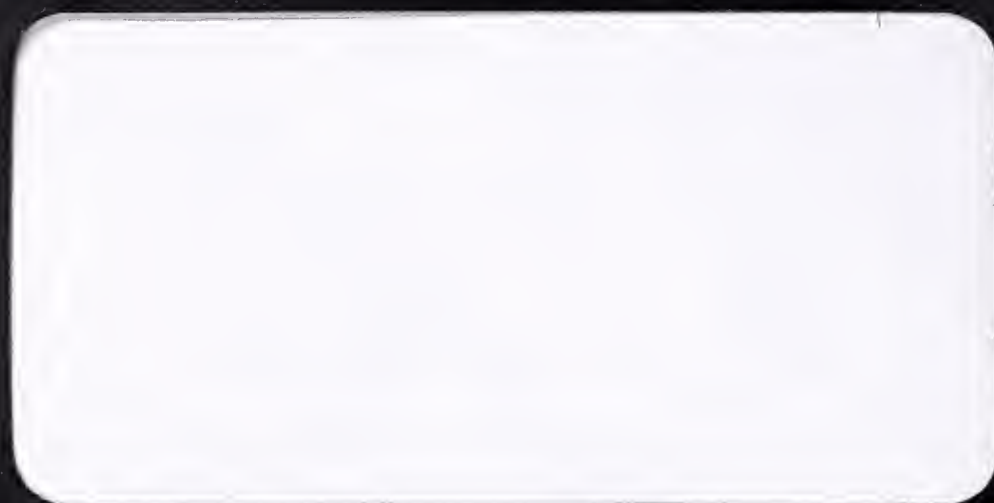




IBM Sacramento Trading Area
Regional Market Analysis,
Phase II

Local Government, Agriculture,
and Food Processing Sectors

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TRADING AREA REGIONAL
MARKET ANALYSIS PHASE II

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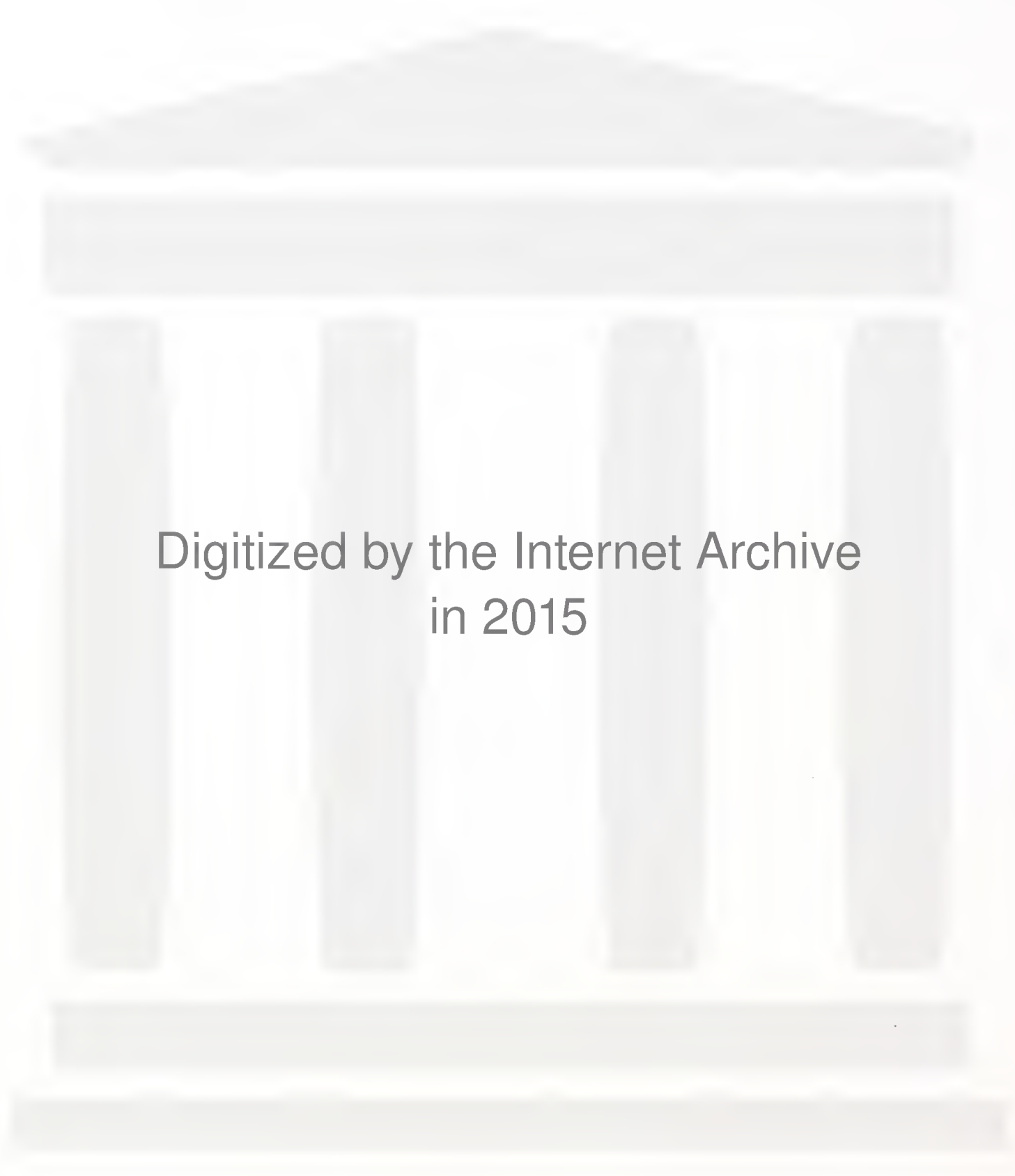
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**IBM Sacramento Trading Area
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EXECUTIVE OVERVIEW

Introduction

A. Background

In order to expand its penetration in the information services market, the Sacramento Services and Customer Solutions Branch of IBM has sought specific information on services markets and business opportunities in its area of operation.

- A *Phase I* study focusing on market sizes and growth rates for key industries was conducted in August, 1991.
- This *Phase II* study was designed to further refine data on key markets identified in *Phase I*, and, using field research techniques, to identify target product/service opportunities.

B. Objectives

Phase II objectives are as follows:

- Identify specific product/service opportunities in the Local Government, Agriculture, and Food Processing markets
- Validate market sizes and growth rates through specific sampling of high potential prospects
- Verify buying points for significant potential buyers in the trading area

Scope

The geographic scope of the study was limited to the Sacramento Trading Area, defined in *Phase I* as the following twelve counties:

- Sacramento, Placer, Stanislaus, Tulare, Kern, Merced, San Joaquin, Yolo, Shasta, Sutter, Fresno, and El Dorado counties

The product/service offerings examined included:

- Professional services, systems integration, systems operations, network services, processing services, applications software, and turnkey systems

Vertical markets covered were those identified in

Field Research - Interview Totals

Local Government	16
Agriculture	5
Food Processing	<u>5</u>
	26

- **Analysis** - Interview findings were tabulated and analyzed to further refine market growth trends and identify product/service opportunities.

Conclusions - Demographics

A. Sites, Revenues, and Headcount

All three industry groups were found to be quite similar in terms of number of sites, revenues, and employee headcount:

- Number of sites (of 100 or more employees): approximately 50 each
- Revenues/operating budgets: clustered in the \$10-50 million range
- Employee headcount: clustered in the range of 100-500

B. Trading Area Characteristics

Observations are as follows:

- A few medium-to-large organizations; lots of small IS shops; family businesses (especially agriculture)
- Agriculture/food subject to seasonal business cycles; large number of temporary workers
- Hardware platforms dominated by minis; PC/LAN environments high (approximately 45%) in agriculture
- Low number of mainframes, except in larger local governments, especially counties
- Heterogeneous hardware environments in larger IS operations

<

F. Significant

Focus on key vertical applications:

- Geographic information systems (GIS)
- Criminal justice/public safety
- Financial systems
- Process manufacturing

Focus on key technologies:

- Imaging (e.g., GIS applications)
- Client/server
- Heterogeneous computing environments
- Downsizing

Introduction/

