HG Insights

INSIGHT REPORT

From "They Have It" to "They're Losing It": Reading Competitive Momentum

How install dates and adoption trend turn a static competitor list into a case you can defend

AN INSIGHT REPORT FOR VPS OF GTM STRATEGY AND OPERATIONS

The Core Finding

A competitor list tells you who owns a category today. It does not tell you who is gaining ground, who is coasting, or who is quietly being replaced. Those are different decisions, and a footprint count cannot separate them.

Three readings can: **footprint** (how many companies run the product now), **tenure** (how long they have run it), and **direction** (whether the base is growing or shrinking). When all three come from dated, sourced install records, a displacement or retention case stops being an opinion. It becomes a sequence of events someone can check.

> KEY TAKEAWAY
>
> Footprint ranks the field. Tenure shows how sticky each product is. Direction shows where the field is heading. A case built on the first reading alone will be challenged on the other two.

Context: Why a Static List Fails the Challenge Question

Most competitive reviews start with the same artifact: a list of competitor products and the accounts that run them. It answers "who has it?" and little else. The questions leadership asks next are harder.

- Is that competitor growing or shrinking in the accounts we care about?
- How long have those accounts run it, and is a renewal likely to be near?
- Did they add it recently, or have they had it for a decade?
- Is the product we are about to target actually leaving, or does it only look that way?

A list cannot answer these because a list has no time in it. Two products with the same account count can sit in opposite situations. One may be a long-tenured base that is slowly eroding. The other may be a newer base that is still expanding. The count is identical; the strategy is not.

The fix is dated evidence. When every install record carries a first-seen date and a last-seen date, a flat list becomes a sequence of events: a product was added, a product stopped being detected, a product was replaced.

Adoption trend, which HG calls Momentum, then combines the current footprint with the direction of travel. A large and declining footprint points to a product losing share. A small and growing one points to a product taking share. The same reading works at the level of a single product, a vendor's portfolio, or one account.

15+ years of install history sit behind the dated records used in this report.

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The Evidence: One Category, Read Three Ways

To show what this looks like in practice, we pulled install records for one vendor-neutral category: core enterprise resource planning (ERP) systems. It is large, mature, and familiar to nearly every GTM team. Products are labeled A through F in order of current footprint, because the point is the method, not the vendors.

Pull date: October 21, 2026. Source: HG Insights install data, deduplicated to corporate family (one count per parent company group). "Active" means the product was detected at the company within the last three months. "Recent adopters" means active companies whose install began within the last 24 months. "Lapsed" means companies where the product was last detected between 3 and 24 months ago.

PRODUCT	ACTIVE COMPANIES	AVERAGE TENURE (YEARS)	RECENT ADOPTERS (FIRST SEEN ≤24 MO.)	RECENT ADOPTERS, SHARE OF ACTIVE	LAPSED (LAST SEEN 3–24 MO. AGO)
Product A	54,936	10.5	12,748	23%	95,007
Product B	36,442	8.3	11,287	31%	64,040
Product C	26,464	7.6	8,228	31%	46,531
Product D	21,578	5.6	8,012	37%	29,733
Product E	10,343	9.7	2,924	28%	18,960
Product F	9,929	5.0	3,340	34%	14,395

Reading one: footprint

Product A is the largest by a wide margin, with about 1.5 times the active base of Product B and more than five times that of Product F. If footprint were your only reading, the story would be simple: A is the incumbent to beat.

Reading two: tenure

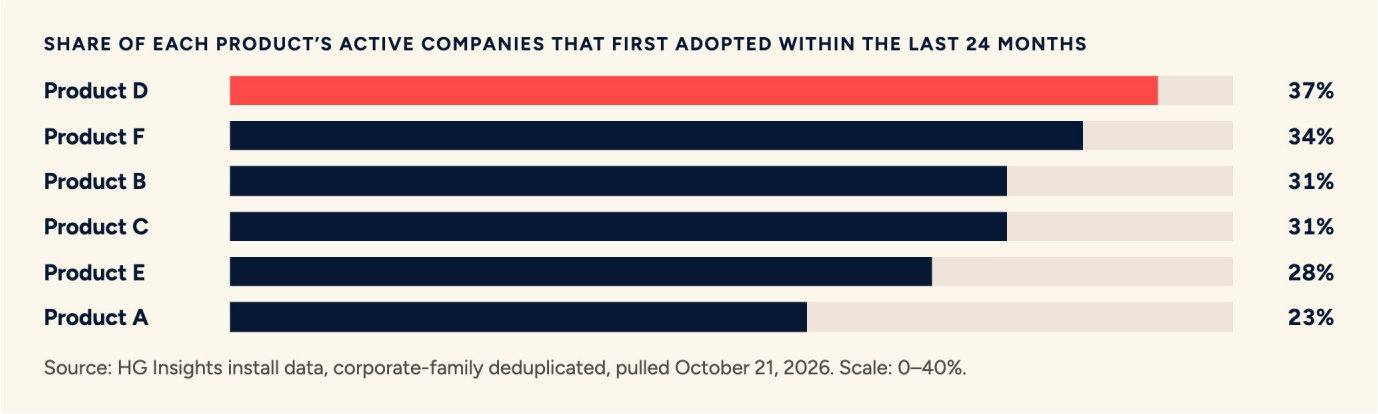
Footprint hides how different the bases are. Products A and E carry the longest average tenure, at 10.5 and 9.7 years. Those are deeply embedded installs that are expensive to move and tied to long planning cycles. Products D and F average 5.6 and 5.0 years. Those are younger bases where the buying decision is more recent.

10.5 vs. 5.0 Average tenure in years for the longest-tenured product (A), against the shortest (F).

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Reading three: direction

The share of recent adopters is the simplest directional proxy a single snapshot allows. Product A, the largest, has the lowest share (23%). Product D, a mid-sized product, has the highest (37%). The biggest base is adding new companies most slowly relative to its size, while a smaller base is refilling fastest.



Source: HG Insights install data, corporate-family deduplicated, pulled October 21, 2026. Scale: 0–40%.

"The largest base is not always the strongest position. Look at who is joining it."

What the Three Readings Do to the Case

Side by side, the picture changes.

Product A

Largest footprint, longest tenure, slowest refill.

A retention fortress for its owner and a hard, long-cycle displacement target for everyone else. The case for targeting it rests on timing and trigger events, not volume.

Product D

Mid-sized footprint, young base, fastest refill.

This is the product taking share. For a team defending against it, the urgency is highest. For a team selling alongside it, it is the easiest door.

Product E

Small footprint, long tenure, modest refill.

A stable niche base unlikely to move quickly in either direction.

37% vs. 23%

Recent-adopter share for Product D, the fastest-refilling base, against Product A, the largest. Size and momentum point in different directions.

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A note on the lapsed column

It counts companies where the product has not been detected in the most recent three months but was seen within the last two years. That mixes true removals with detection gaps, so it is not a churn rate. Treat it as a flag for where to look next: open the accounts behind the number, check the last-seen dates, and look for a replacement product that appeared in the same window. That check is where dated records earn their keep.

> KEY TAKEAWAY
>
> A snapshot gives you a proxy for direction. A true adoption trend, tracked over time at the product, vendor-portfolio, or account level, gives you the signal itself. Use the proxy to prioritize and the trend to commit.

Implications: What This Means for a GTM Strategy and Ops Leader

Your competitor list needs two more columns.

Add tenure and direction. Without them, every competitor looks equally permanent.

Prioritization changes.

Footprint-only targeting sends effort to the largest bases, which are often the most entrenched. Direction-aware targeting finds the bases that are moving.

Retention exposure shows up earlier.

The same reading applied to your own products, or to the accounts you protect, shows erosion before it reaches the renewal forecast.

The case survives scrutiny.

When a CRO or CFO asks where the number came from, the answer is a set of dated records, a stated method, and a repeatable query, not a screenshot of a spreadsheet.

What To Do About It

01 **Pick one live competitive question.** A target competitor, an account segment, or a defensive worry. Keep it to the question your next planning meeting will actually ask.

02 **Pull footprint, tenure, and recent-adopter share for the category.** Use the method on the next page. Start at the product level, then roll up to the vendor portfolio if the competitor sells more than one product.

03 **Drill into the accounts behind any surprising number.** Check first-seen and last-seen dates, and look for a replacement product appearing in the same window as a removal.

04 **Package the evidence with its method.** Attach the definitions, the pull date, and the query so a second analyst can reproduce it.

05 **Re-run it on a schedule.** Direction only helps if you keep checking it. A quarterly read suits most categories.

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Method: Reproduce This Analysis

You can run this on any technology category in an afternoon, or in a single request to an agent.

01 **Define the category.** Choose a leaf-level technology category, not a vendor. Here: core enterprise resource planning systems.

02 **Select the products.** Take the top products by current active companies. This report uses the top six.

03 **Count current footprint.** Count distinct corporate-family companies where the product was detected within the last three months. Counting at corporate-family level keeps one parent from being counted once per subsidiary.

04 **Measure tenure.** Average the install age, in months, across active installs and convert to years.

05 **Measure recent adoption.** Count active companies whose first-seen date falls within the last 24 months, then divide by active companies.

06 **Flag lapses.** Count companies where last-seen falls between 3 and 24 months ago. Treat this as a prompt for investigation, not a churn rate.

07 **Check the accounts.** For any product that stands out, open the underlying account records and read the dates.

08 **Add trend.** Where adoption-trend data is available at product, vendor-portfolio, or account level, add it to the footprint and tenure readings.

How a team's own agent retrieves this

Teams that already run an AI agent do not need to request an export to do this. HG MCP Server connects that agent to HG's install records with first-seen and last-seen dates, spend across 150+ IT spend categories, corporate hierarchies, and the evidence behind each result. A curated competitive analysis workflow runs as a single instruction inside the MCP-compatible agent the team already uses, and each result traces back to the records that produced it.

For teams waiting on IT or security approval to connect a third-party tool, a Playground is available. Teams that would rather not build their own workflows can work with HG's forward deployed engineering (professional services). Every endpoint is authenticated and logged, so each agent run leaves an audit trail.

Limitations and Sources

- Figures come from a single snapshot pulled on October 21, 2026 from HG Insights install data for one category. Results for other categories will differ.
- Recent-adopter share is a directional proxy, not an adoption trend. Lapsed counts mix removals and detection gaps.
- Products are anonymized and labeled A through F by current footprint. Counts are at corporate-family level.
- Install records carry first-seen and last-seen dates, and HG's install history spans 15+ years.

Source: HG Insights install data (current installs, corporate-family deduplicated, platform-permissible records only), queried October 21, 2026.

This analysis reflects install data as of October 21, 2026. Recommended refresh: quarterly.

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