May 30, 2014
Dresner Advisory Services, LLC

2014 Edition

Wisdom of Crowds®
Business Intelligence Market Study

Licensed to Information Builders

Disclaimer

Business Intelligence: A Definition

Business intelligence (BI) is "knowledge gained through the access and analysis of business information.

Business intelligence tools and technologies include query and reporting, OLAP (online analytical processing), data mining and advanced analytics, end-user tools for ad hoc query and analysis, and dashboards for performance monitoring."

Howard Dresner, *The Performance Management Revolution: Business Results Through Insight and Action* (John Wiley & Sons, 2007)

Introduction

This year we celebrate the seventh anniversary of Dresner Advisory Services! Our thanks to all of you that have been with us along the way—encouraging and challenging us!

Since our founding in 2007, we have strived to offer a fresh, real-world and alternative perspective on the business intelligence (BI) market. We hope that you agree that we not only have succeeded in doing so but have continued to "raise the bar"—offering increasingly compelling research and greater value with each successive year!

To date, the Wisdom of Crowds® family of reports remains unique in that it is the only comprehensive research on BI usage and trends from the viewpoint of end users. By looking first hand at the experience of IT and business users as well as industry implementation consultants, we can better provide you, our readers, with the in-depth knowledge of the drivers of BI, where and how companies use BI, and what likely will be the next trends on the horizon.

Since we began publishing industry research reports, we have expanded from only two reports in 2010 to over 10 reports planned for 2014. This includes Location Intelligence, Cloud BI (3rd annual), Collaborative BI (3rd annual), our flagship Wisdom of Crowds® BI Market Study (5th annual), BI Competency Center, Advanced & Predictive Analytics, Healthcare, BI Emerging Technologies (2nd annual), Small & Midsized Enterprise BI Market Study (2nd annual), and Mobile Computing/Mobile BI Market Study (6th annual).

To this end, we've added more resources to Dresner Advisory Services including the addition of a new research director and a senior editor.

For this year's "flagship" Wisdom of Crowds business intelligence report, we've built on our five years of data to include a number of multi-year comparisons. This, in addition to a number of wholly new analyses, makes it a valuable tool for anyone considering investing in BI products and services.

In addition to the research reports cited above, it is our goal to publish research on a number of emerging topics, which we will announce in the latter part of 2014.

In closing, we're very excited about both the market and our ability to continue to add substantial perspective and value to it!

Thanks for your support!

Best,

Howard Dresner
Chief Research Officer
Dresner Advisory Services

Contents

Benefits of the Study

The Wisdom of Crowds® Business Intelligence Market Study provides a wealth of information and analysis – offering value to both consumers and producers of Business Intelligence technology and services.

Consumer Guide

As an objective source of industry research, consumers use the Wisdom of Crowds® Business Intelligence Market Study to understand how their peers leverage and invest in business intelligence and related technologies.

Using our trademark 33-criteria vendor performance measurement system, users glean key insights into BI software supplier performance, enabling:

- Comparisons of current vendor performance to industry norms
- Identification and selection of new vendors

Supplier Tool

Vendor Licensees use the Wisdom of Crowds® Business Intelligence Market Study in several important ways. For example, to:

External Awareness

- Build awareness for the business intelligence market and supplier brand, citing Wisdom of Crowds® business intelligence Market Study trends and vendor performance
- Create lead and demand-generation for supplier offerings through association with Wisdom of Crowds® Business Intelligence Market Study brand, findings, webinars, etc.

Internal Planning

- Refine internal product plans and align with market priorities and realities as identified in Wisdom of Crowds® Business Intelligence Market Study
- Better understand customer priorities, concerns, and issues
- Identify competitive pressures and opportunities

About Howard Dresner and Dresner Advisory Services

The Wisdom of Crowds® Business Intelligence Market Study was conceived, designed, and executed by Dresner Advisory Services, LLC, an independent advisory firm, and Howard Dresner, its president, founder and chief research officer.

Howard Dresner is one of the foremost thought leaders in business intelligence and performance management, having coined the term "Business Intelligence" in 1989. He has published two books on the subject, *The Performance Management Revolution – Business Results through Insight and Action* (John Wiley & Sons, Nov. 2007) and *Profiles in Performance – Business Intelligence Journeys and the Roadmap for Change* (John Wiley & Sons, Nov. 2009). He lectures at forums around the world and is often cited by the business and trade press.

Prior to Dresner Advisory Services, Howard served as chief strategy officer at Hyperion Solutions and was a research fellow at Gartner, where he led its business intelligence research practice for 13 years.

Howard has conducted and directed numerous in-depth primary research studies over the past two decades and is an expert in analyzing these markets.

Through the Wisdom of Crowds® Business Intelligence market research reports, we engage with a global community to redefine how research is created and shared. Landmark research reports include the:

- Wisdom of Crowds® Business Intelligence Market Study

- Wisdom of Crowds® Collaborative Business Intelligence Market Study

- Wisdom of Crowds® Cloud Business Intelligence Market Study

- Wisdom of Crowds® Location Intelligence Market Study

- Wisdom of Crowds® Small & Midsized Business Intelligence Market Study

- Wisdom of Crowds® Mobile Computing/ Mobile Business Intelligence Market Study.

Howard (www.twitter.com/howarddresner) conducts a weekly Twitter "tweetchat" on Fridays at 1:00 p.m. ET. The hashtag is #BIWisdom. During these live events the #BIWisdom "tribe" discusses a wide range of business intelligence topics.

You can find more information about Dresner Advisory Services at www.dresneradvisory.com.

About Jim Ericson

Jim Ericson is a research director with Dresner Advisory Services.

Jim has served as a consultant and journalist who studies end-user management practices and industry trending in the data and information management fields.

From 2004 to 2013 he was the editorial director at *Information Management* magazine (formerly *DM Review*), where he created architectures for user and industry coverage for hundreds of contributors across the breadth of the data and information management industry.

As lead writer he interviewed and profiled more than 100 CIOs, CTOs, and program directors in a 2010-2012 program called "25 Top Information Managers." His related feature articles earned ASBPE national bronze and multiple Mid-Atlantic region gold and silver awards for Technical Article and for Case History feature writing.

A panelist, interviewer, blogger, community liaison, conference co-chair, and speaker in the data-management community, he also sponsored and co-hosted a weekly podcast in continuous production for more than five years.

Jim's earlier background as senior morning news producer at NBC/Mutual Radio Networks and as managing editor of MSNBC's first Washington, D.C. online news bureau cemented his understanding of fact-finding, topical reporting, and serving broad audiences.

Survey Method and Data Collection

As with the original Wisdom of Crowds® Business Intelligence Market Study, we constructed a survey instrument to collect data and used social media and crowd-sourcing techniques to recruit participants.

We expanded data collection to include our own research community of roughly 2,000 organizations as well as vendors' customer communities.

Data Collection

Our respondent base grew to 1,283 for 2014, an 8.5 percent increase over 2013. In the three years since 2011 interest in the study in the form of completed surveys has more than doubled.
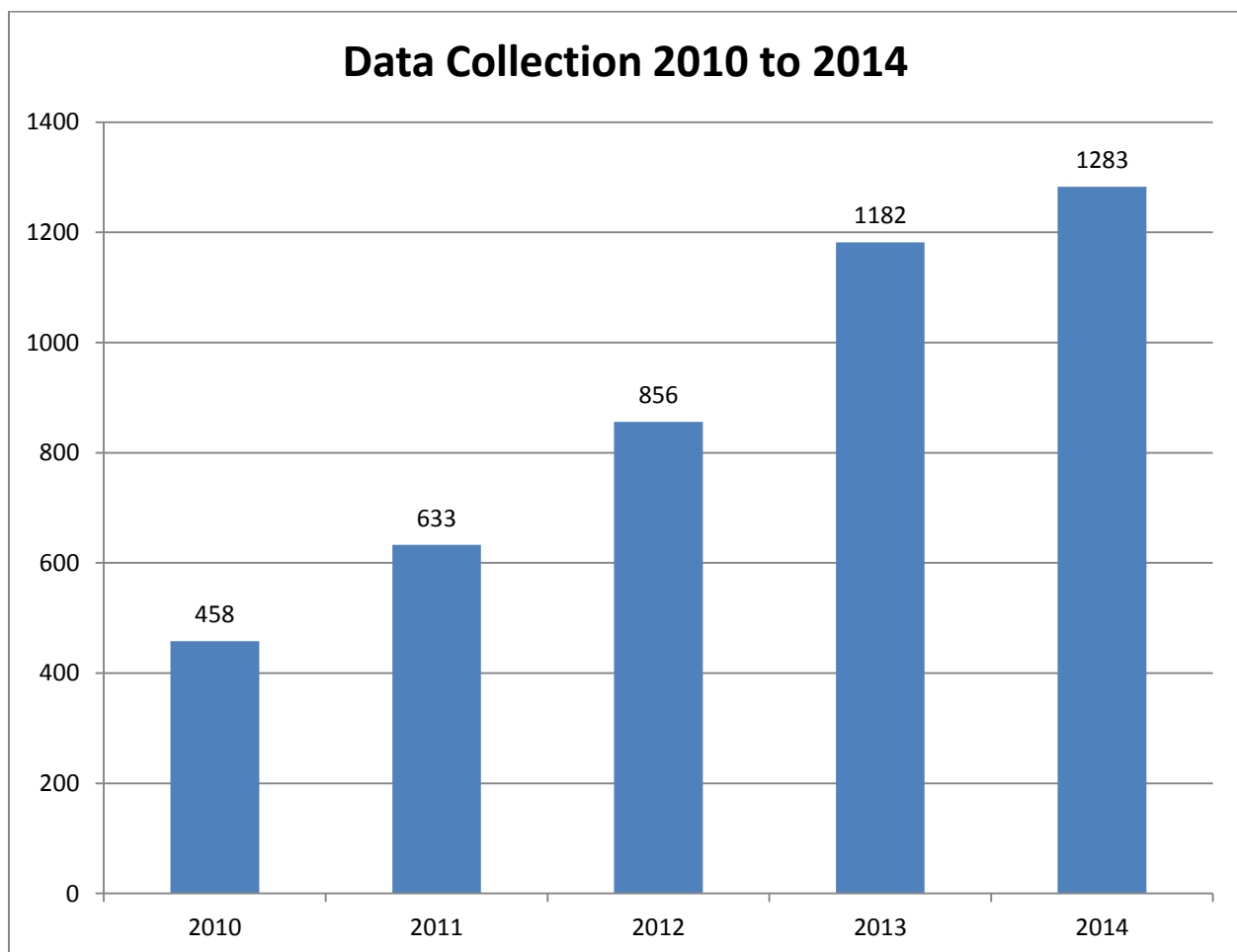
Figure 1. Numbers of survey respondents 2010 to 2014

Data Quality

We carefully scrutinized and verified all respondent entries to ensure that the study includes only qualified participants.

New for 2014

For 2014 we again expanded our research objectives substantially. As with 2013, this is particularly evident in the area of user trending. This year's study adds:

- Additional technologies and initiatives strategic to business intelligence including: location intelligence, pre-packaged applications, and end-user data "blending," for a total of 22 areas.
- Business intelligence and The State of Data, a more qualitative appraisal of business intelligence maturity and best practices.
- Action on Insight, which reflects the degree to which organizations are taking data into use beyond passive reporting/observation.

Vendor/Market Categories

For the purposes of this report, we utilize six different BI industry sub-categories in which to group vendors and analyze market behavior and direction. As in 2013 these include "Early Stage," "Emerging," "High Growth," "Large Established Pure-Play," "Specialized" and "Titan" vendors.

Early-Stage vendors are among the youngest and/or smallest BI software companies, with limited revenues and customers, and offering "concierge" style service. Vendors in this segment include Exago, Intuitive BI, and Report Miner.

Emerging BI vendors are typically younger than other categories and offer unique and often innovative business models, technologies, and/or services. This category includes: Adaptive Insights, Birst, GoodData, Jaspersoft, and Jedox.

High-Growth BI vendors have achieved critical mass in the market and are growing at an extremely high rate—well above the industry average. For 2014, vendors include Logi Analytics, Pentaho, Tableau, and TIBCO Spotfire.

Large Established Pure-Play BI vendors predominately focus upon business intelligence software and services, typically have been in business for 15 or more years, and have well-established customer bases and revenue streams. Several are publicly held concerns. These include Actuate, Information Builders, MicroStrategy, Qlik, and SAS Institute.

Specialized BI vendors are established (10+ years old), focused on a specific market segment (e.g., vertical industry), and are substantially smaller than Large Established Pure-Plays. Included in this category are Dimensional Insight, Dundas, JinfoNet, Phocus, and Targit.

Titans are the largest vendors, with extensive product and service offerings—including business intelligence. In all cases these vendors acquired business intelligence vendors. Included in this category are IBM/Cognos, Infor, Microsoft, Oracle, and SAP/BusinessObjects.

Executive Summary

Executive Summary

- In a new qualitative appraisal of organizations' "State of Data," about 70 percent of respondents report advanced to very advanced data environments and practices.
- More than 85 percent of organizations consider themselves coordinated or very coordinated in their ability to act on insight from their data activities.
- Success with business intelligence relates strongly and directly to an organization's state of data.
- Success with business intelligence corresponds strongly to an organization's ability to act on insight.
- "Better decision making" is the BI objective most strongly identified with across functions, industries and geographies
- Executive management remains the strongest functional driver of business intelligence; finance, sales, marketing and supply chain have gained a bit more influence while the BICC and R&D have ticked down.
- User groups other than managers or executives are targeted as users less than 30 percent of the time; a low emphasis on outside BI empowerment reflects a more parochial approach.
- Penetration remains modest; more than one-third of organizations report fewer than 10 percent of employees using BI; the smallest and largest organizations claim the strongest penetration.
- Despite low penetration, organizations tell us of ambitious plans for extending their user base in coming time frames.
- Dashboards, end-user self-service, data warehousing, and advanced visualization lead the list of technologies and initiatives strategic to business intelligence.
- Sentiment regarding technology priorities is consistent with 2013 with two minor exceptions: cloud BI and open source grew slightly.
- Industry scores for the sales and acquisition experience are at an all-time high with professionalism and product knowledge leading the way.
- Overall industry value is considered "very good" though integration with third- party technology and forums/training/documentation are still lacking.
- A majority feel overall industry performance is about the same as last year though less than five percent think industry performance has declined.
- BI vendor consulting is a bright spot in 2014; all measures including consulting continuity showed strong gains.

Study Demographics

Study Demographics

As with last year, we're seeing a rich cross-section of data across geographies, functions, organization size, and vertical industries. We believe that, unlike other industry research, this supports a more representative sample and better indicator of true market dynamics. We constructed cross-tab analyses using these demographics to identify and illustrate important industry trends.

Geography

As in previous years, survey respondents represent a broad span of geographies. North America, which includes the United States, Canada, and Puerto Rico, again represents the largest group with slightly more than half of all respondents. Year over year, the global sample becomes more balanced: EMEA is better represented and represents 30 percent of the total compared to 25 percent last year. The sample base in Asia Pacific also grew slightly (fig. 2).

Geographies represented

Geography	Percentage
North America	53%
Europe, Middle East, & Africa	30%
Asia Pacific	13%
Latin America	4%
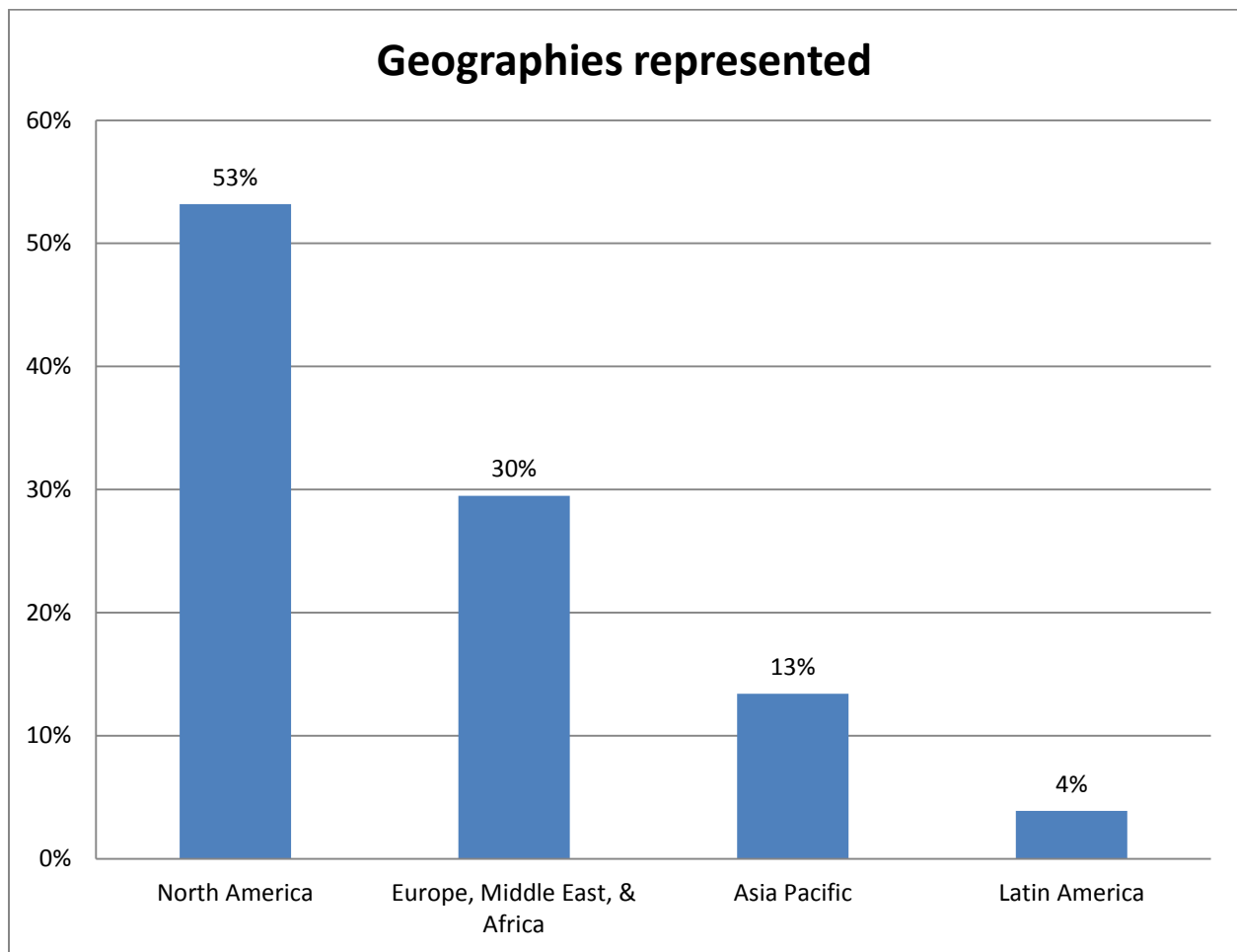
Figure 2. Geographic distribution

Functions

In 2013 we expanded the functions tracked in the study by adding the BI Competency Center (BICC) and we split sales and marketing into their respective functions where they had previously been combined. In 2014 the functional base loosely mirrors last year with the IT department representing the largest single group and 34 percent of the sample. Executive management (17 percent) and the BICC (15 percent) are again the next most represented (fig. 3). Respondents in finance grew from six percent to 10 percent of the base in 2014; sales and R&D also grew slightly from 2013.

Tabulating results across functions helps us develop analyses that reflect the differences and influence of different departments within organizations.
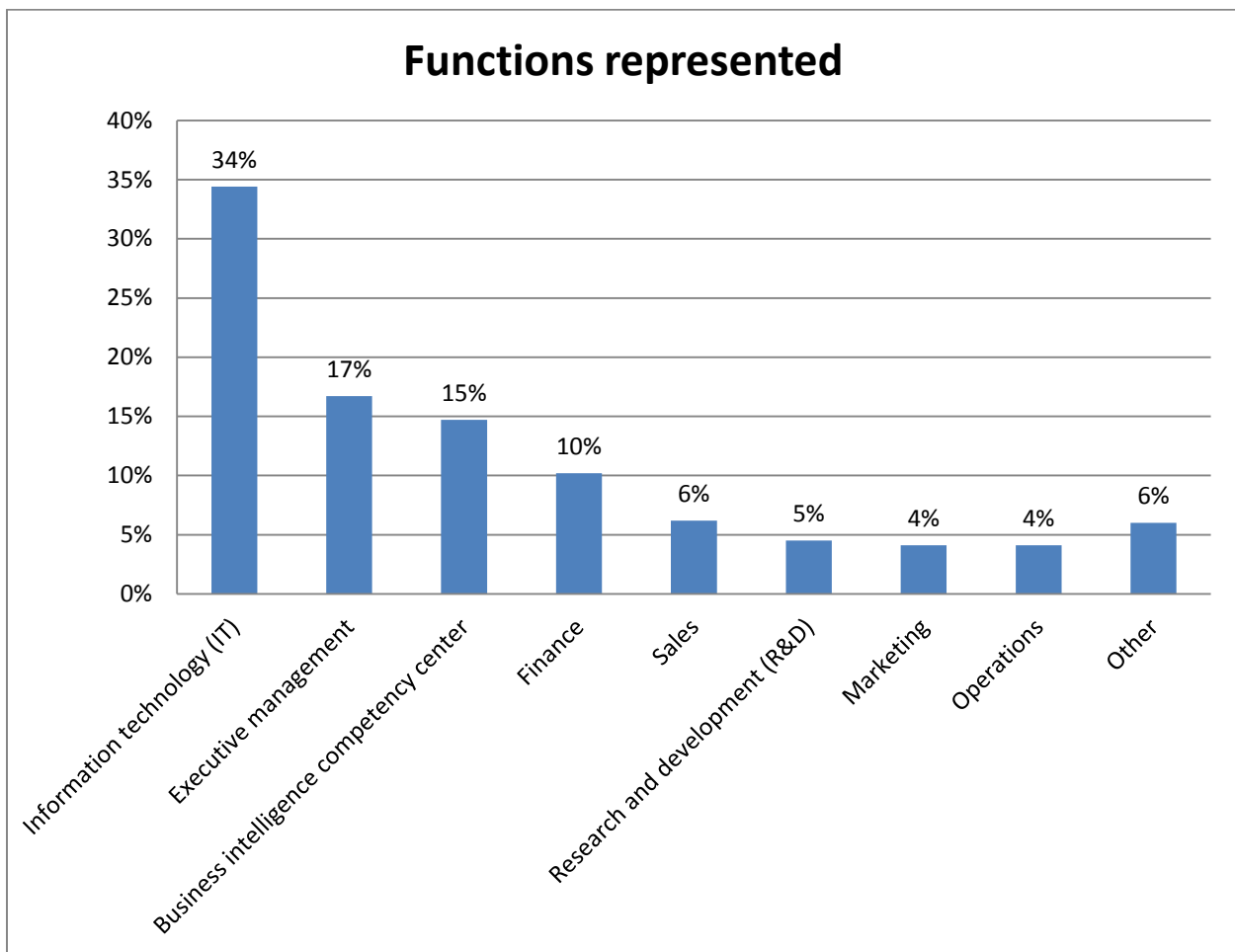
Figure 3. Functions represented

Vertical Industries

Technology and consulting are the most represented industries in 2014, though more than half of all respondents identified with other industries (fig. 4). Healthcare edged out financial services to become the third-largest industry represented in 2014. The percentage of respondents that self-identified their industry improved: in 2014, 12 percent of the base responded with "other" compared to about 24 percent in 2013.

Tabulating results across industries helps us develop analyses that reflect the maturity and direction of different business sectors.
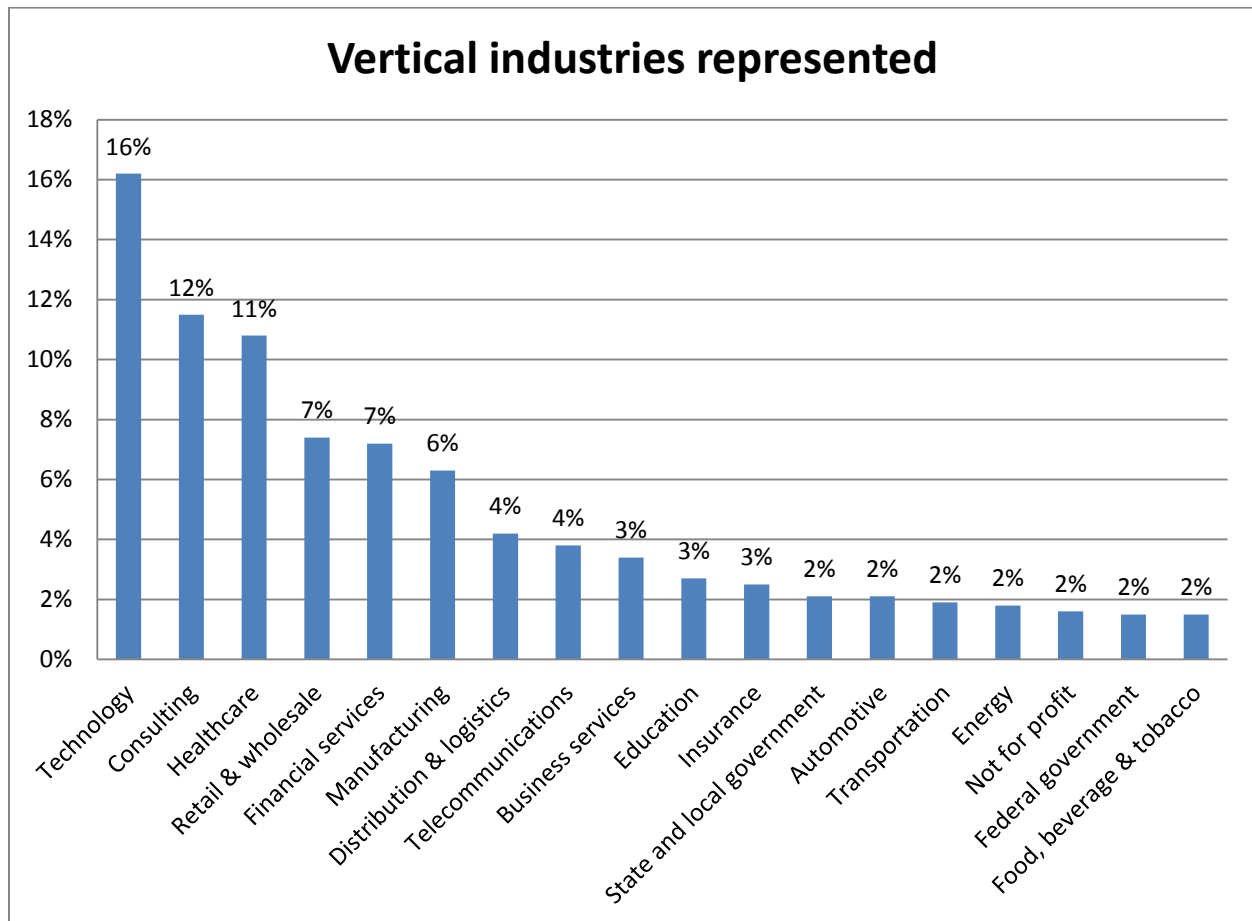
Figure 4. Vertical industries

Organization Size

The balance of participation by organization size (global employee head count) is similar to 2013. One-third of respondents come from organizations of 100 or fewer employees, about 30 percent work in organizations of 101-1,000 and more than one-third work at organizations with more than 1,001 employees (fig. 5).

Tabulated results across organizations of different size reflect important differences in planning and maturity.

Organization size

Size	Percentage
1-100	32%
101-1,000	30%
1,001-2,000	6%
2,001-5,000	9%
5,001-10,000	7%
More than 10,000	16%
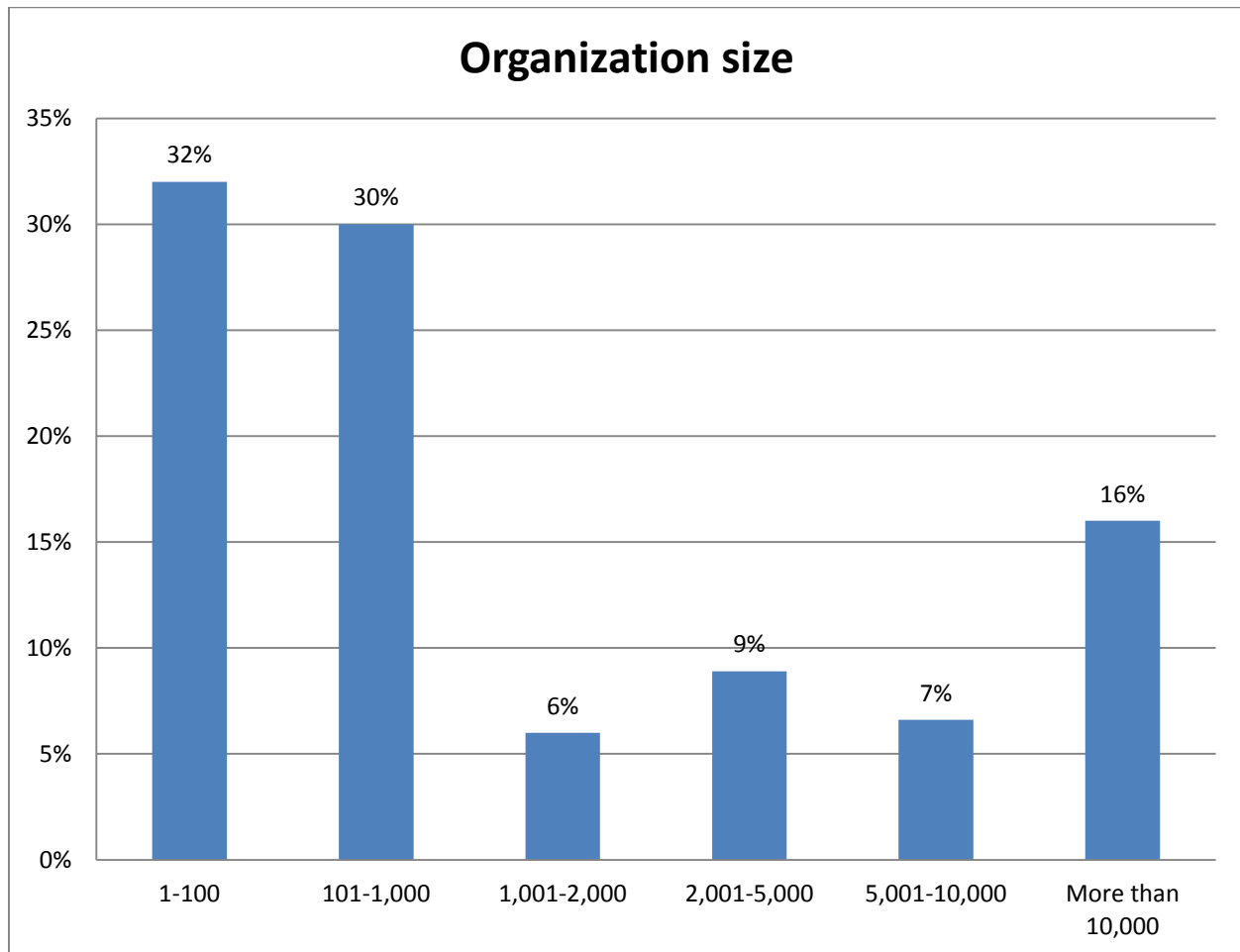
Figure 5. Size of organization

Analysis and Trends

Analysis and Trends

Departments/Functions Driving Business Intelligence

In 2013 we began to explore the discrete functions driving business intelligence initiatives within respondents' organizations, and tabulated results show a wide breadth of influence. In 2014 we again asked respondents which functional areas drive business intelligence "always," "often," "sometimes," "rarely," or "never." We used this to create a weighted average on a 5.0 scale. In 2014, executive management is again the strongest functional driver of business intelligence, and other rankings are mostly similar to 2013 (fig. 6). We see an uptick in the influence of finance, sales, marketing and supply chain, while the BICC and R&D have ticked down. In 2014 we started tracking faculty and clinical functions while understanding that a limited number of respondents will be exposed to these roles in their organizations.
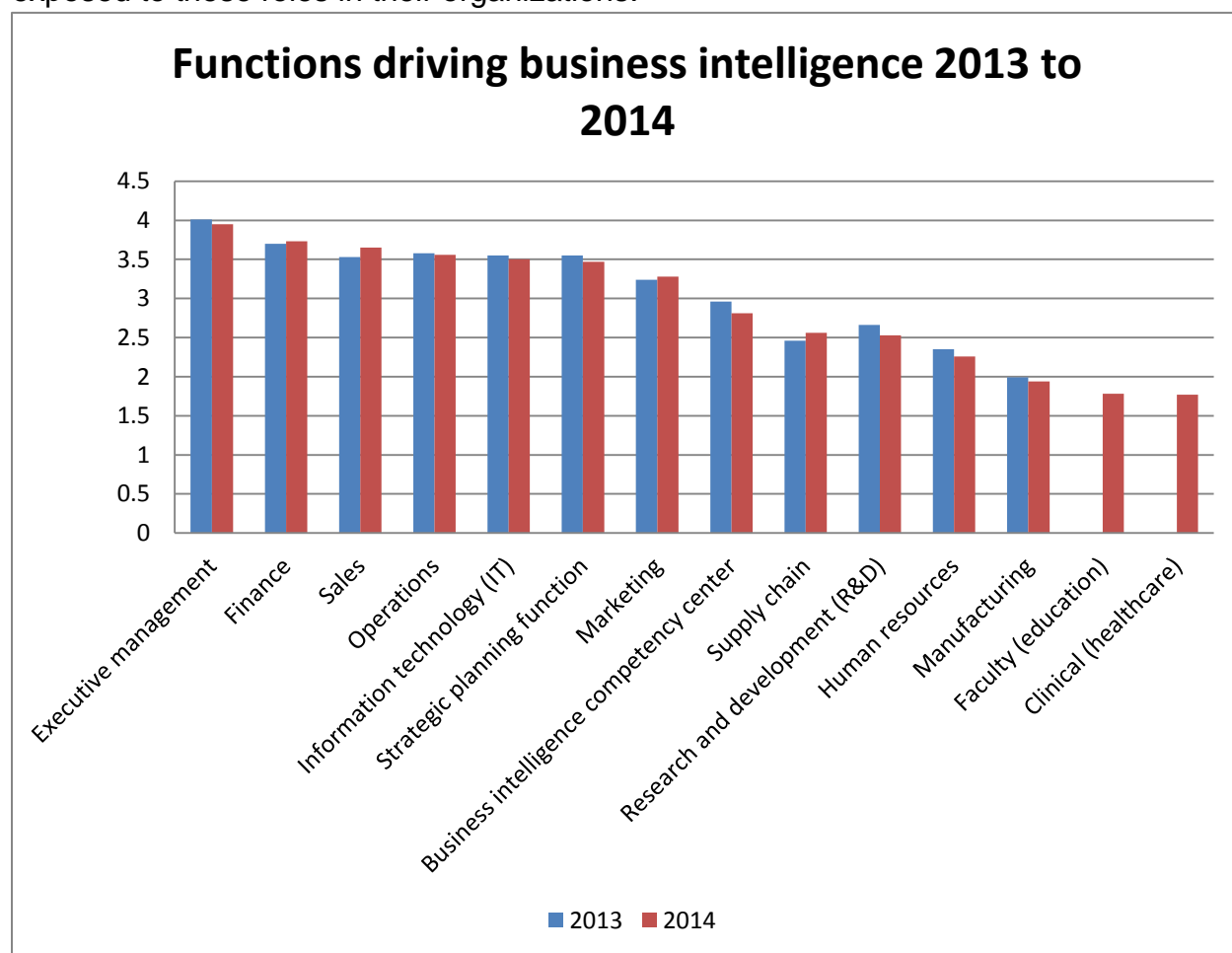
Figure 6. Functions driving business intelligence 2013 to 2014 (weighted average)

Functions Driving Business Intelligence by Major Geography

Across geographies, executive management is described as the strongest functional driver of business intelligence, though not by an outsized margin (fig. 7). There is mostly multiregional consensus that multiple functions are driving business intelligence with average sentiment ranging between "sometimes" to "often." Finance and sales (especially Latin America) are regarded as somewhat stronger drivers outside North America. The BICC is the function least likely to drive business intelligence in all geographies studied.
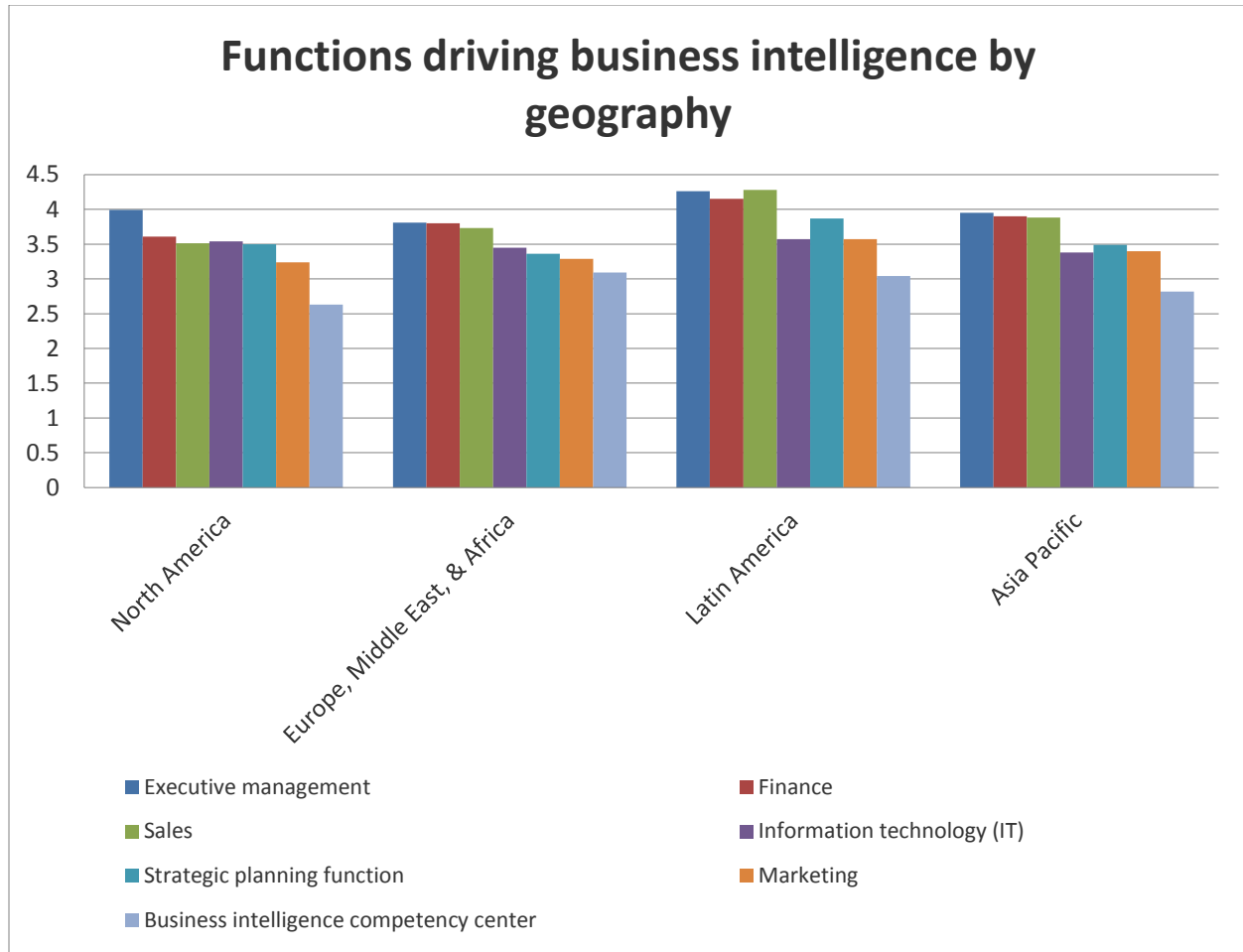
Figure 7. Functions driving business intelligence by major geography (weighted average)

Functions Driving Business Intelligence by Vertical Industry

Executive management is consistently the driving function across industries (fig. 8). As would be expected, the sales and marketing functions are less influential in healthcare, sales takes the lead role in retail/wholesale and manufacturing, and finance carries the most influence in manufacturing and financial services.
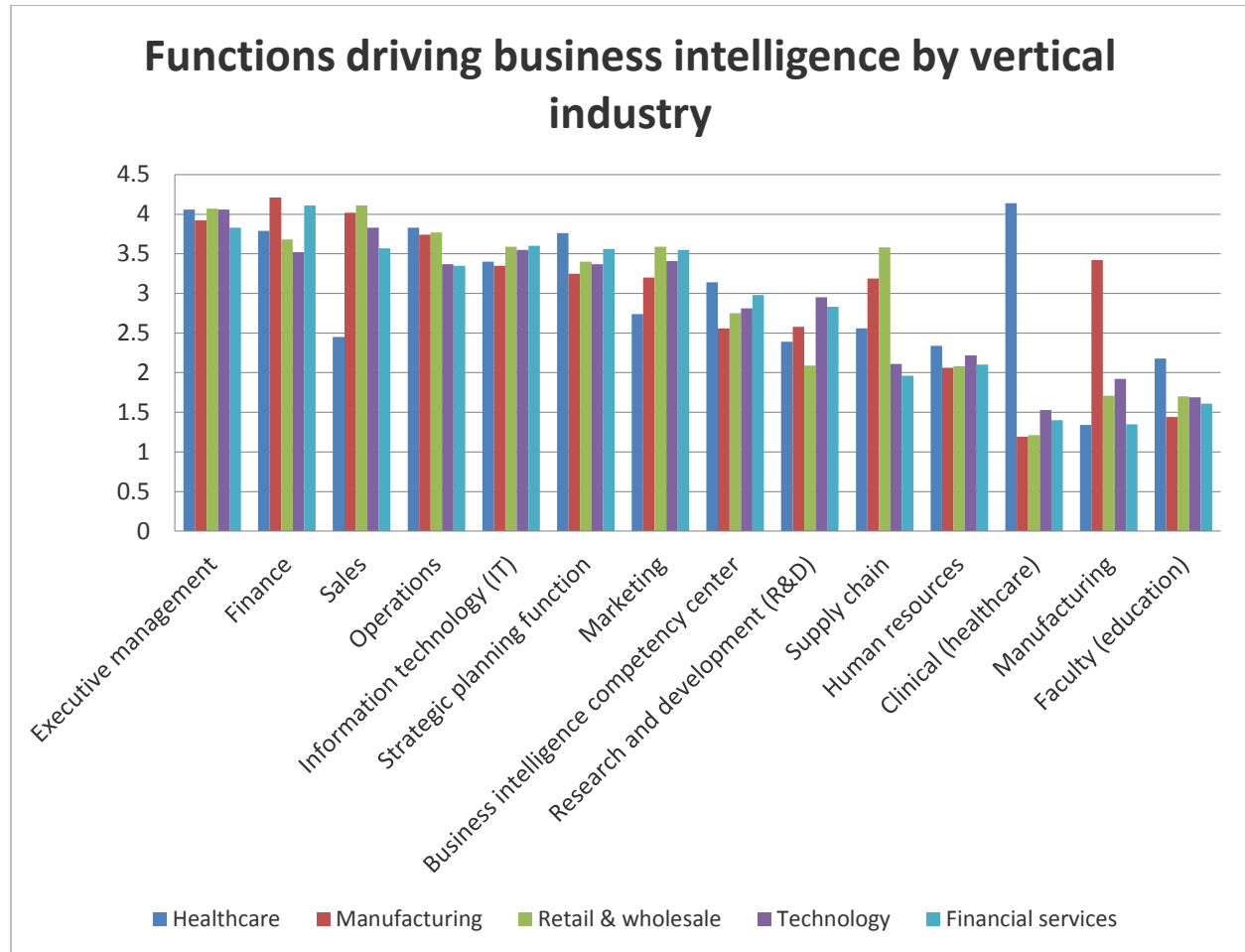
Figure 8. Functions driving business intelligence by vertical industry (weighted average)

Functions Driving Business Intelligence by Organization Size

Executive management, sales, and finance are the functions most likely to drive business intelligence in small and mid-sized organizations (fig. 9). In very large organizations of 5,000 or more, the influence of executives and sales diminishes as operations becomes more of a functional driver.
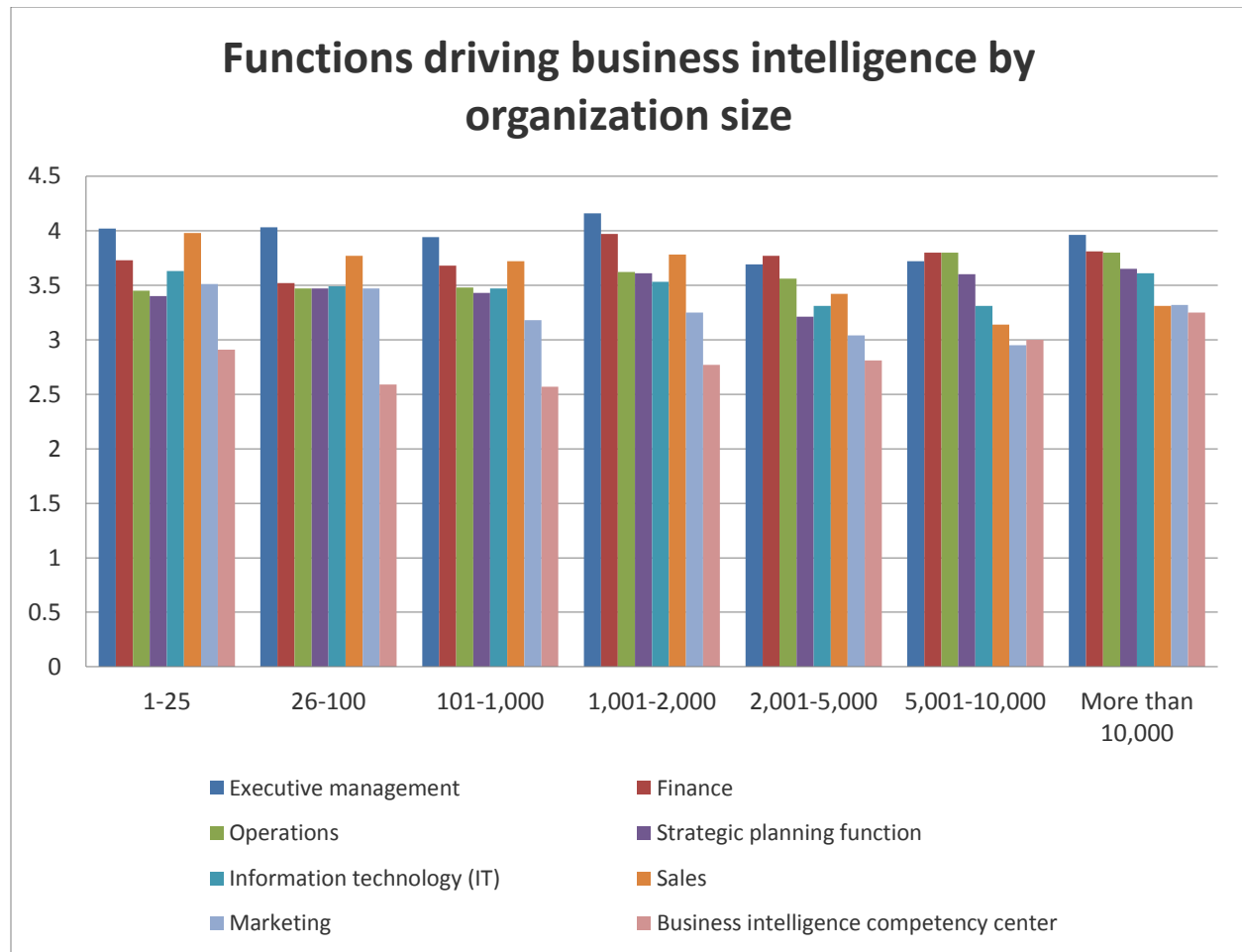
Figure 9. Functions driving business intelligence by organization size (weighted average)

User Roles Targeted for Business Intelligence

For the last two years, executives and middle managers are the most targeted users of business intelligence by a considerable margin (fig. 10). A lesser priority for other users and the low emphasis on outside BI empowerment reflects a parochial approach. Year-over-year targeted user bases are flat or growing very slowly, giving lie to any immediate forecasts of "BI for the masses."
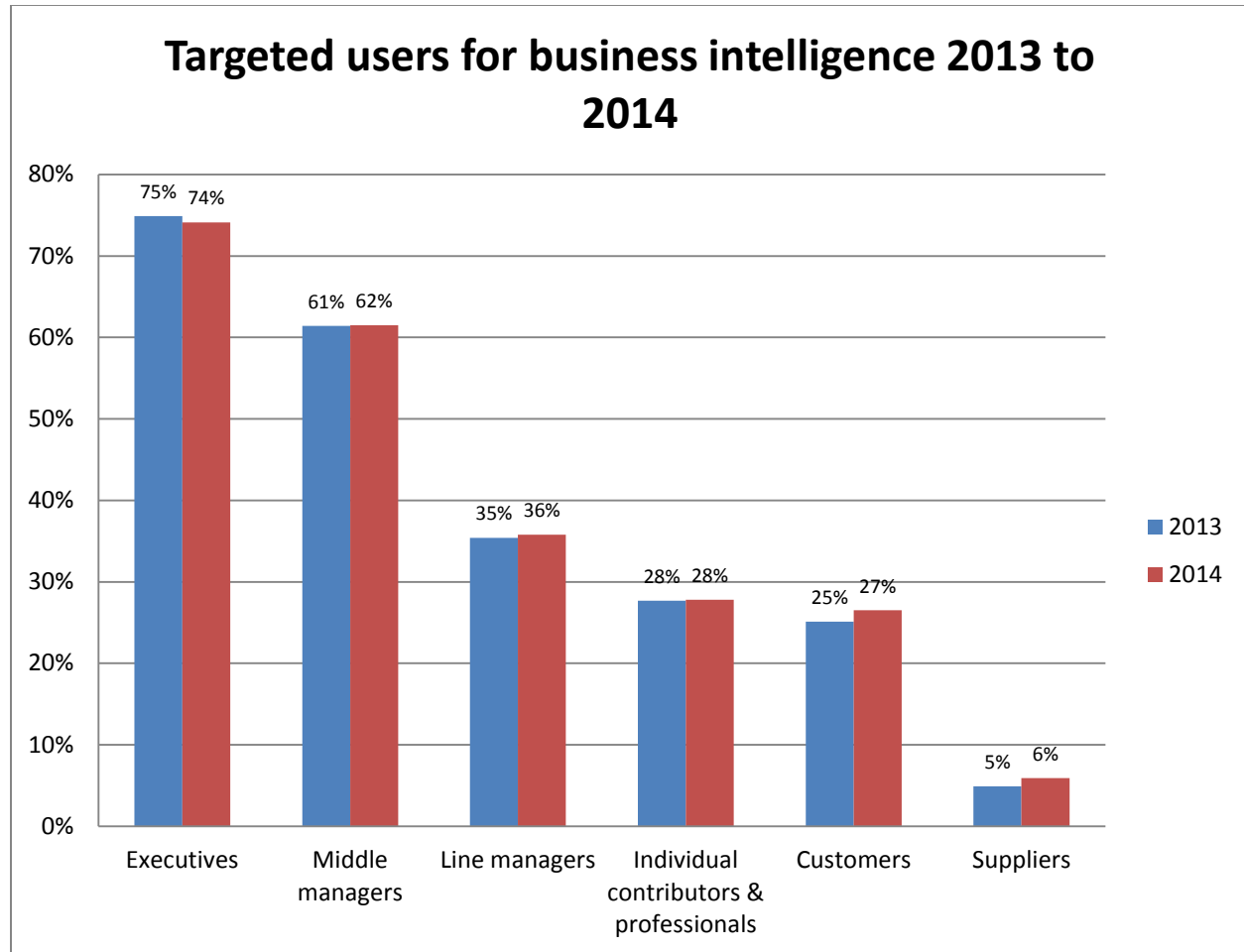
Figure 10. Targeted users for business intelligence 2013 to 2014

Targeted Users for Business Intelligence by Geography

Here we examine the importance of targeted audiences by geography (fig. 11). At least 70 percent of respondents from every major geographic region target executives as a primary audience, and at least 60 percent see middle managers as primary users. Line managers are somewhat more targeted in the United States and Latin America; Latin America is the only region that targets customers more than 30 percent of the time. Suppliers are targeted as primary users by less than 10 percent of organizations in any global region.
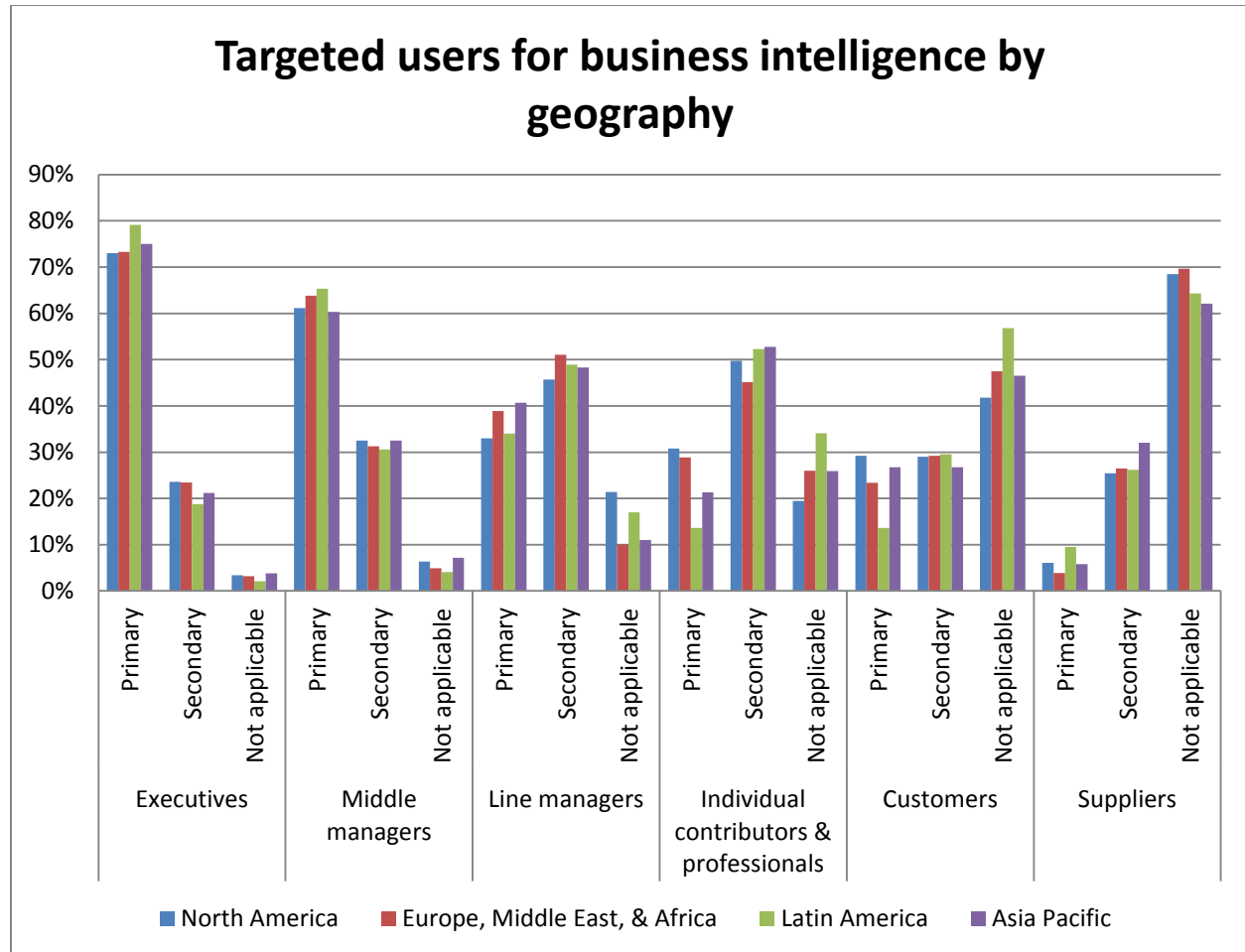
Figure 11. Targeted users for business intelligence by geography

User Targets for Business Intelligence by Organization Size

Executives and managers dominate the list of targeted users across organizations of all sizes to the tune of 70 percent or more of the base (fig. 12). Small organizations of 100 or less are more likely to target customers; mid-sized and large organizations are somewhat more likely to target individual contributors and professionals.
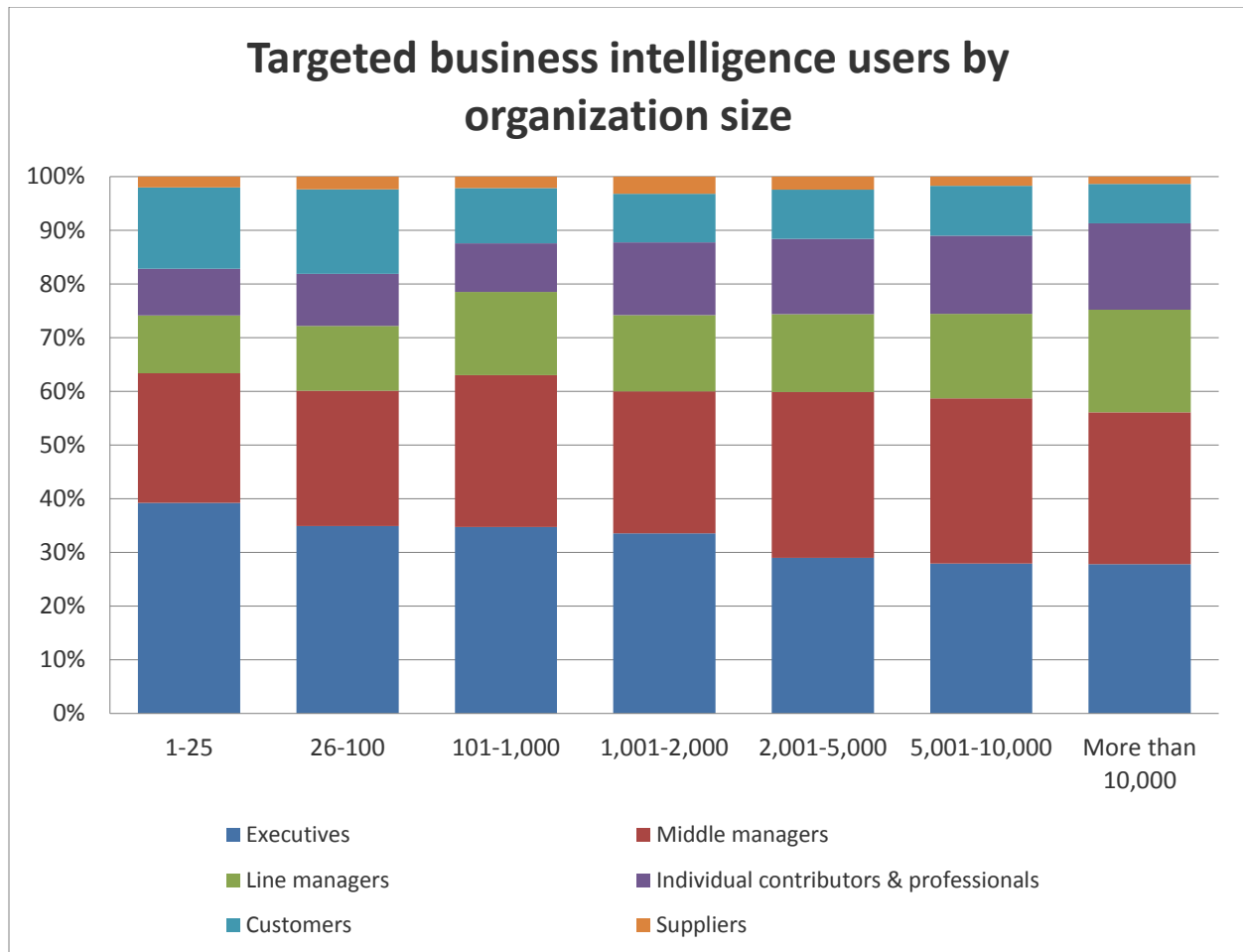
Figure 12. Targeted business intelligence users by organization size

User Targets for Business Intelligence by Vertical Industries

The industries represented in the sample have a largely internal focus on targeting executives and managers (fig. 13). This sentiment is strongest in manufacturing, where executives and managers make up 85 percent of the target audience. Technology organizations target customers more often than other industries. Financial services and to a lesser extent healthcare target the most balanced mix that extends to customer and individual contributor bases.
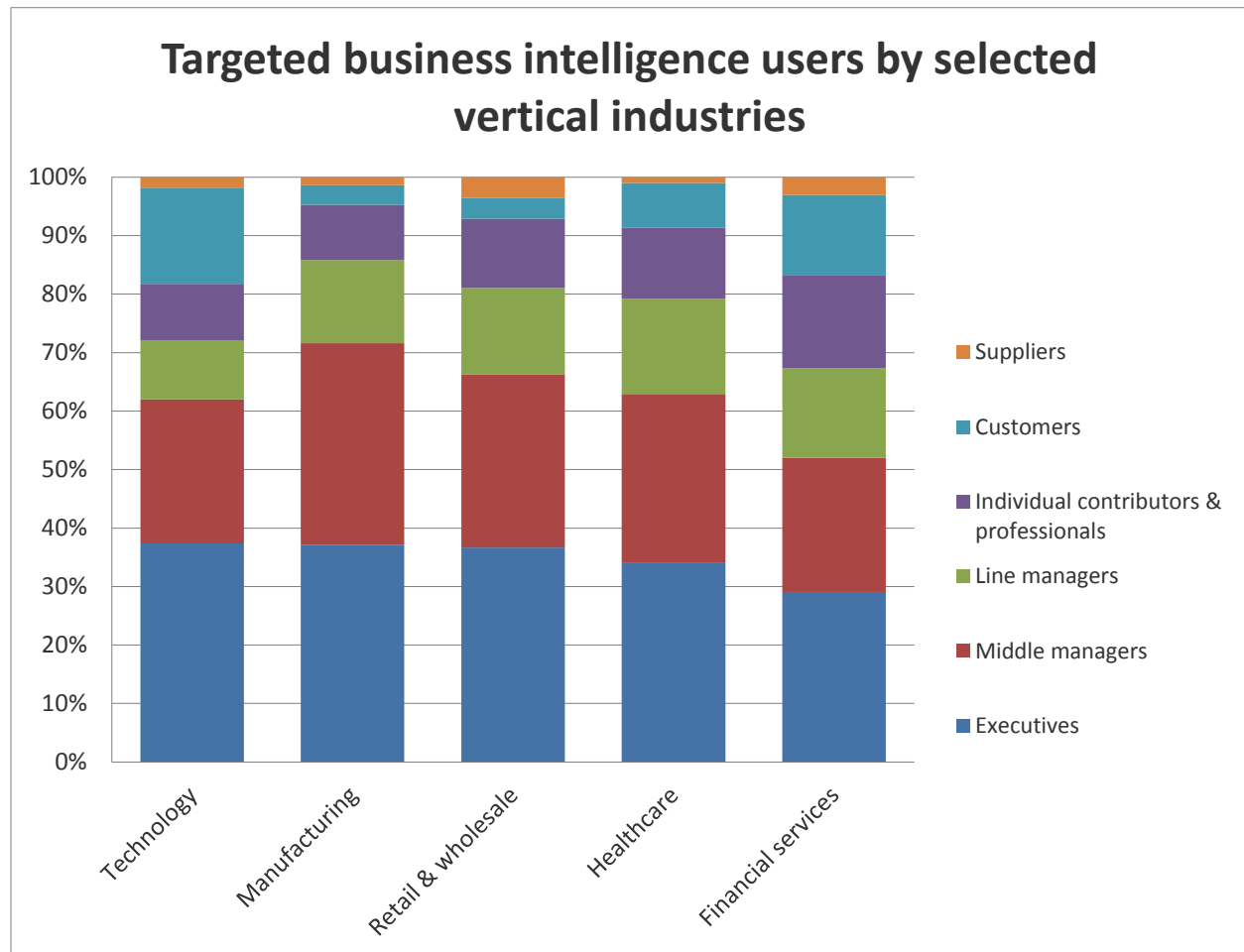
Figure 13. Targeted business intelligence users by selected vertical industries

Objectives for Business Intelligence

The anecdotal and arguably philosophical goal of "making better decisions" again topped the list of business intelligence objectives in 2014 down only slightly over the prior study (fig. 14). Business intelligence objectives are very consistent year over year, showing only slightly more emphasis on revenues and competitive advantage and slightly diminished emphasis on operational efficiency and customer service.

Business intelligence objectives 2013 to 2104
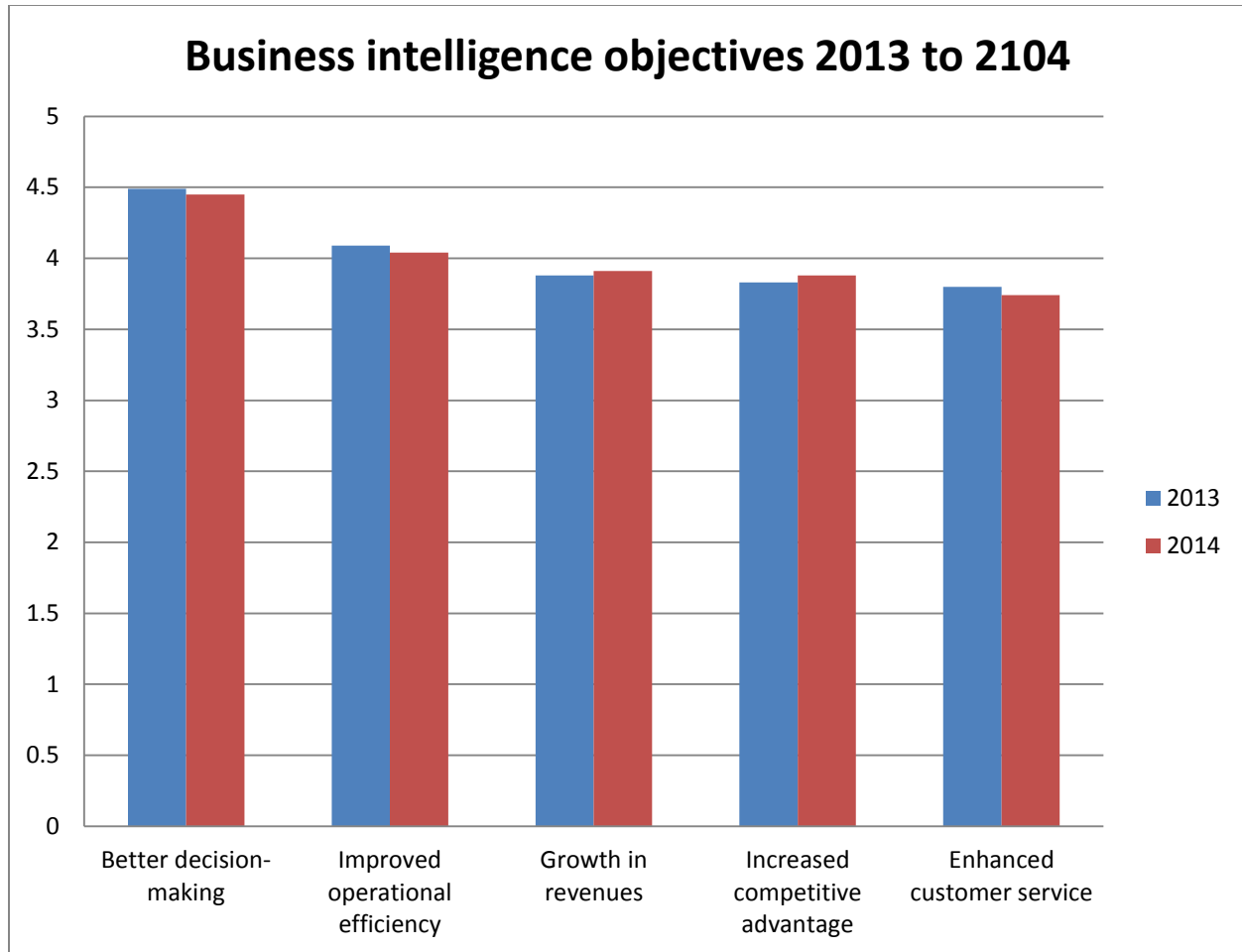
Figure 14. Business intelligence objectives 2013 to 2014 (weighted average)

Business Intelligence Objectives by Geography

"Better decision-making" remains the mantra for BI objectives across every geographical region (fig. 15). Revenue growth as an objective grew in all markets year over year except for EMEA, where operational efficiency showed the greatest gain. Enhanced customer service—and every other objective category—trends slightly higher in North America and Latin America than in other regions.
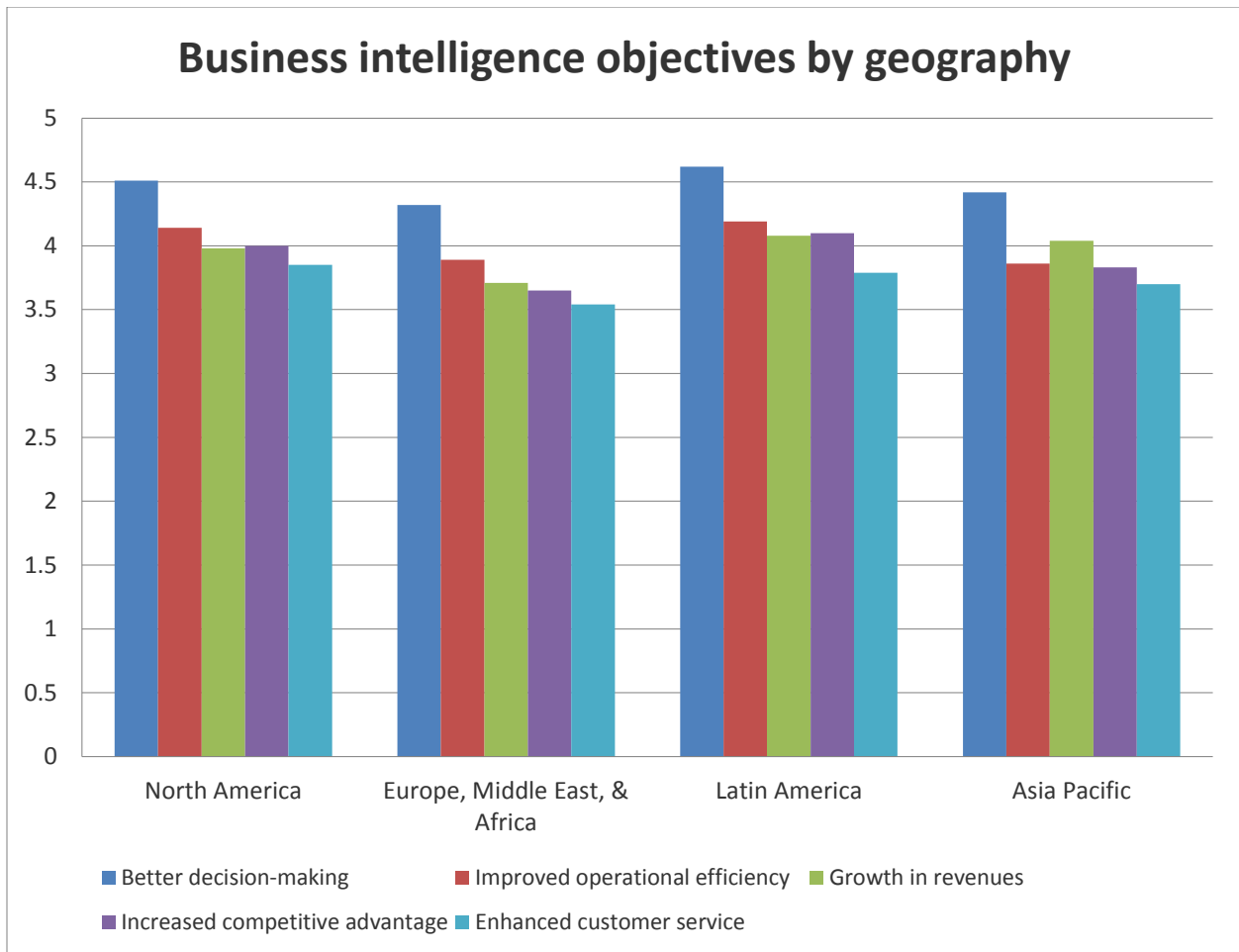
Figure 15. Business intelligence objectives by geography (weighted average)

Business Intelligence Objectives by Function

Executive Management takes the strongest view of business intelligence objectives in every category except revenue growth, where sales unsurprisingly leads the way followed by marketing (fig. 16). Generally, executive management, sales and marketing have the strongest opinion on BI objectives. Finance and information technology lag except in the category of "better decision-making" which overall has the strongest consensus view of importance as an objective.
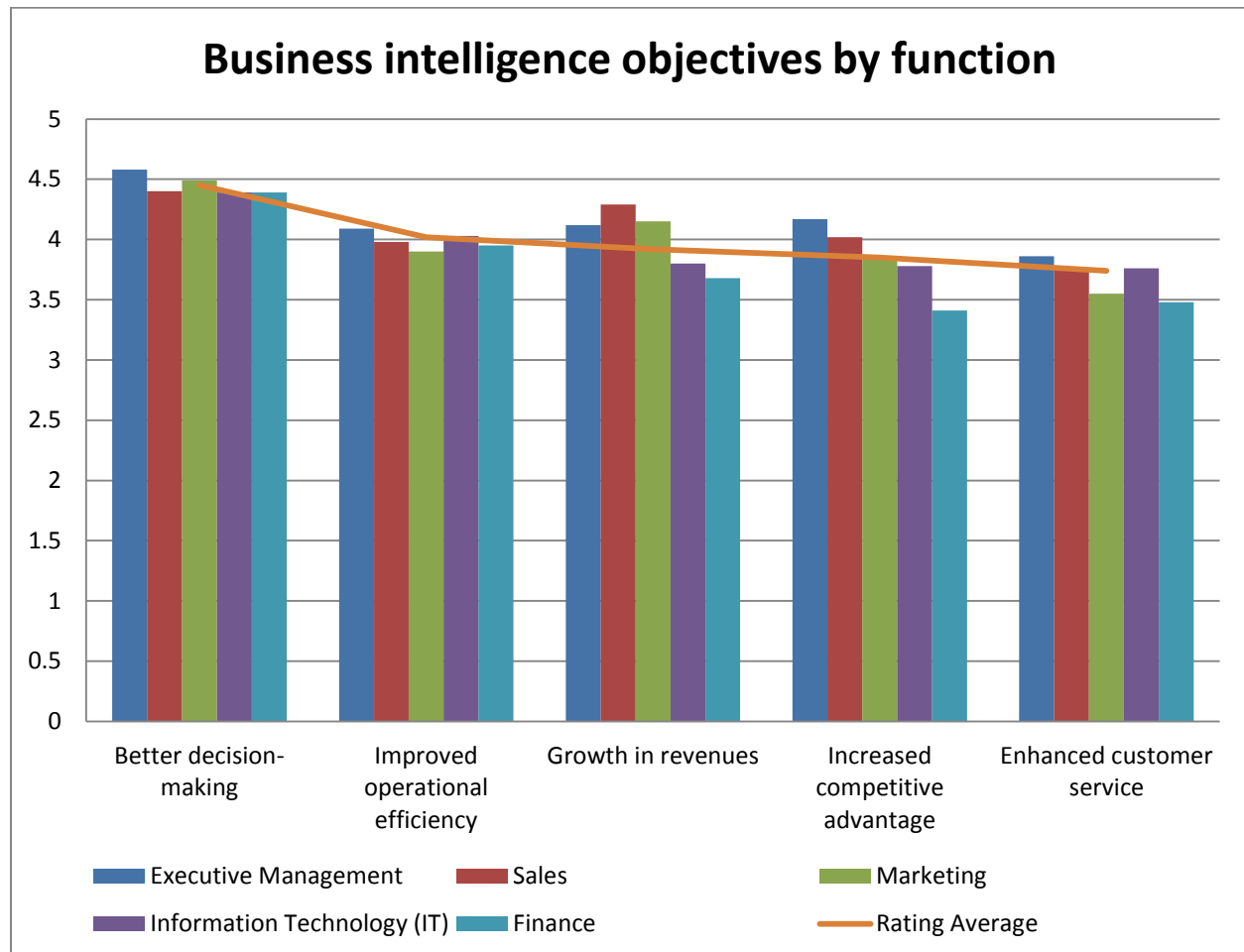
Figure 16. Business intelligence objectives by function (weighted average)

Business Intelligence Objectives by Vertical Industry

Across all industries, better decision making is the BI objective that respondents identify with most strongly (fig. 17). By a good margin, healthcare respondents are the most interested in improving operational efficiency. Retail/wholesale and technology have a slightly stronger attitude toward competitive advantage and revenue growth than other industries.
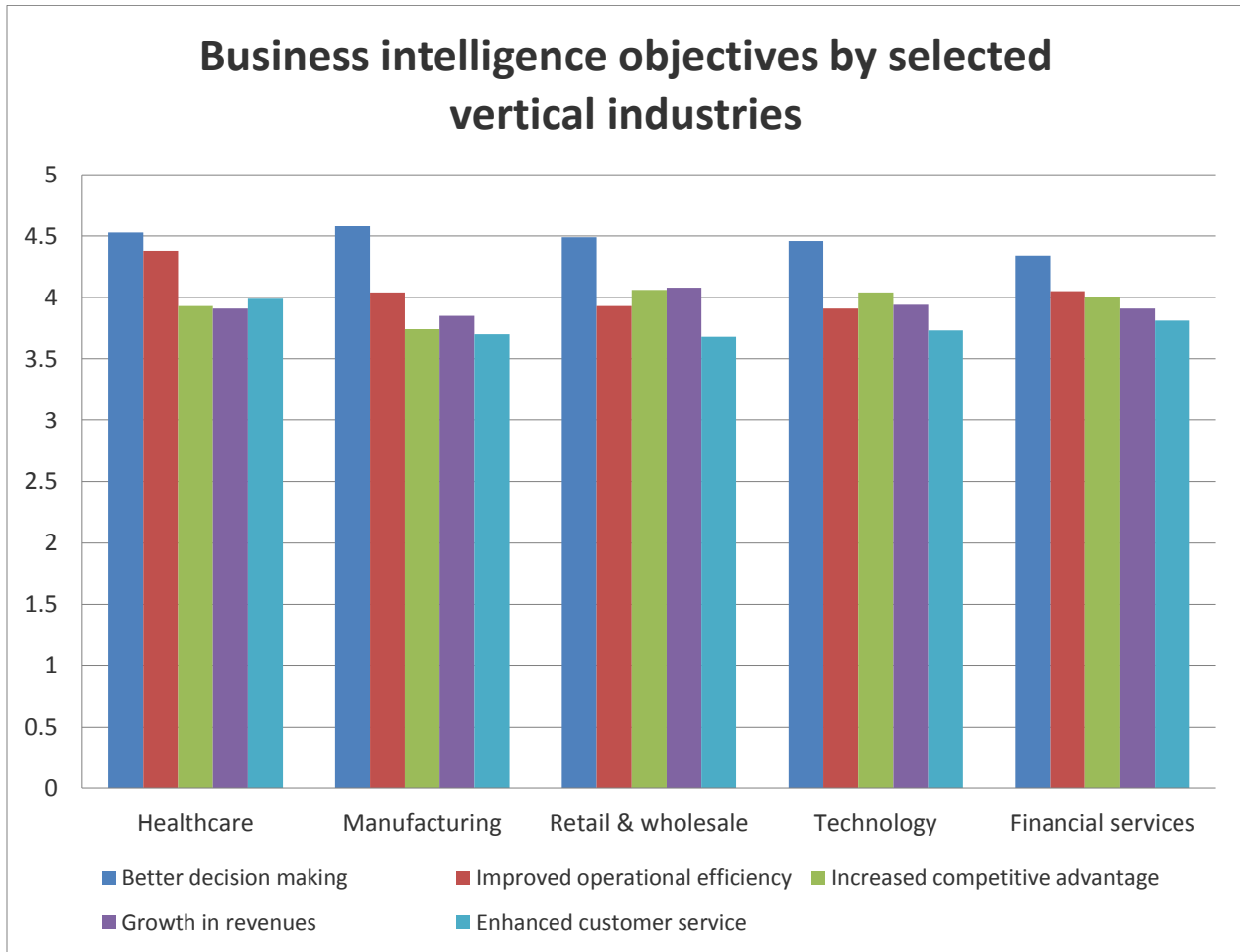
Figure 17. Business intelligence objectives by selected vertical industries (weighted average)

Business Intelligence Objectives by Organization Size

Organizations of different size have disparate attitudes toward business intelligence objectives (fig. 18). There is a consensus view toward the objective of better decision making, but attitudes vary toward other goals. The smaller an organization is, the more emphasis they place upon competitive advantage and growth in revenues. As organization size increases, there is a shift away from those goals in favor of operational efficiency.
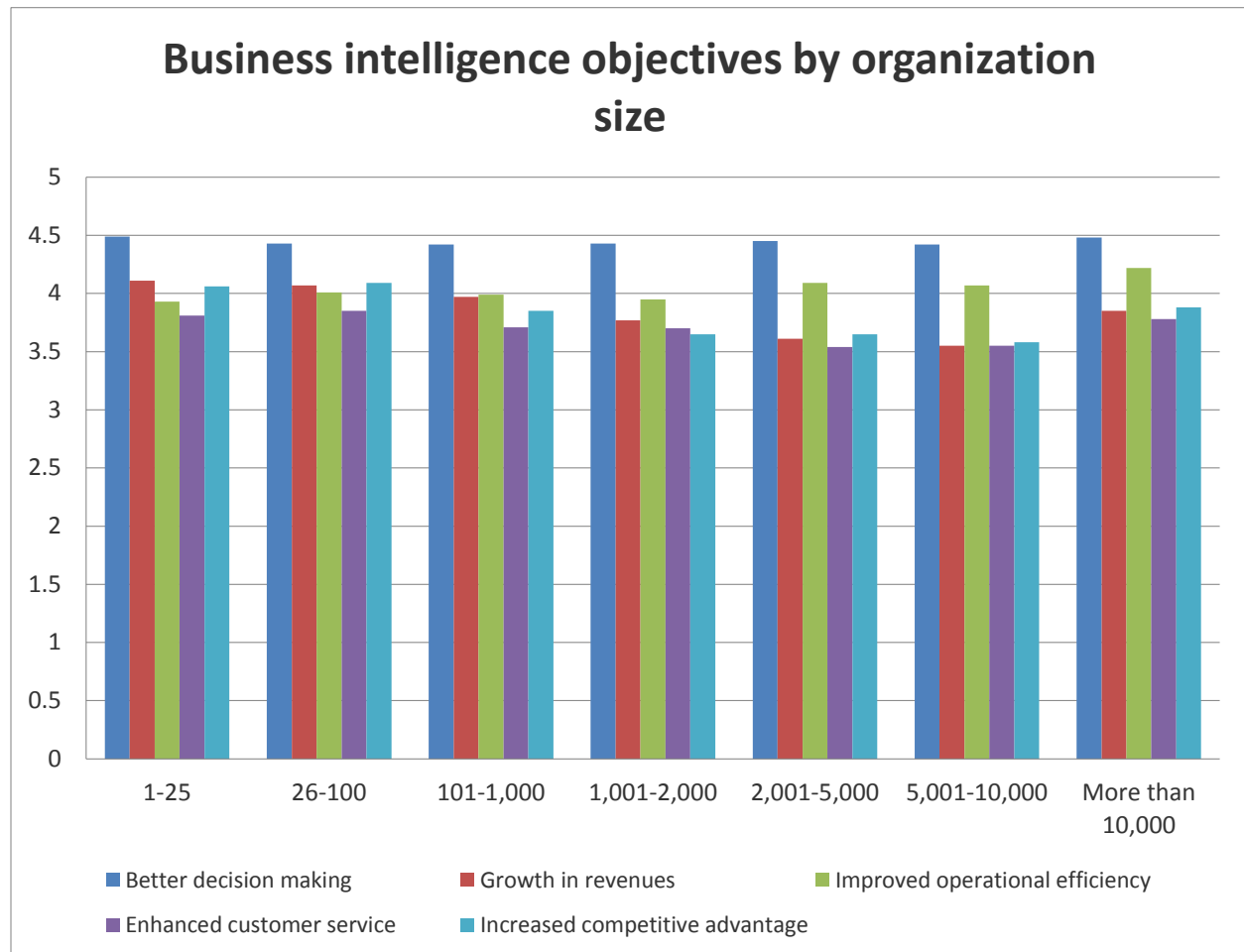
Figure 18. Business intelligence objectives by organization size (weighted average)

Penetration of Business Intelligence Solutions

Penetration of business intelligence (as a percentage of numbers of employees) remains modest (fig. 19). More than one-third of organizations report fewer than 10 percent of employees using BI; the numbers decline until they reach a select group of organizations that report 81 percent or greater user penetration. Though this appears to present a growth opportunity (reflected in the following chart "expansion plans"), 2014 numbers are almost identical to rates of penetration in 2013.

Figure 19. Penetration of business intelligence solutions today

Expansion Plans for Business Intelligence Through 2017
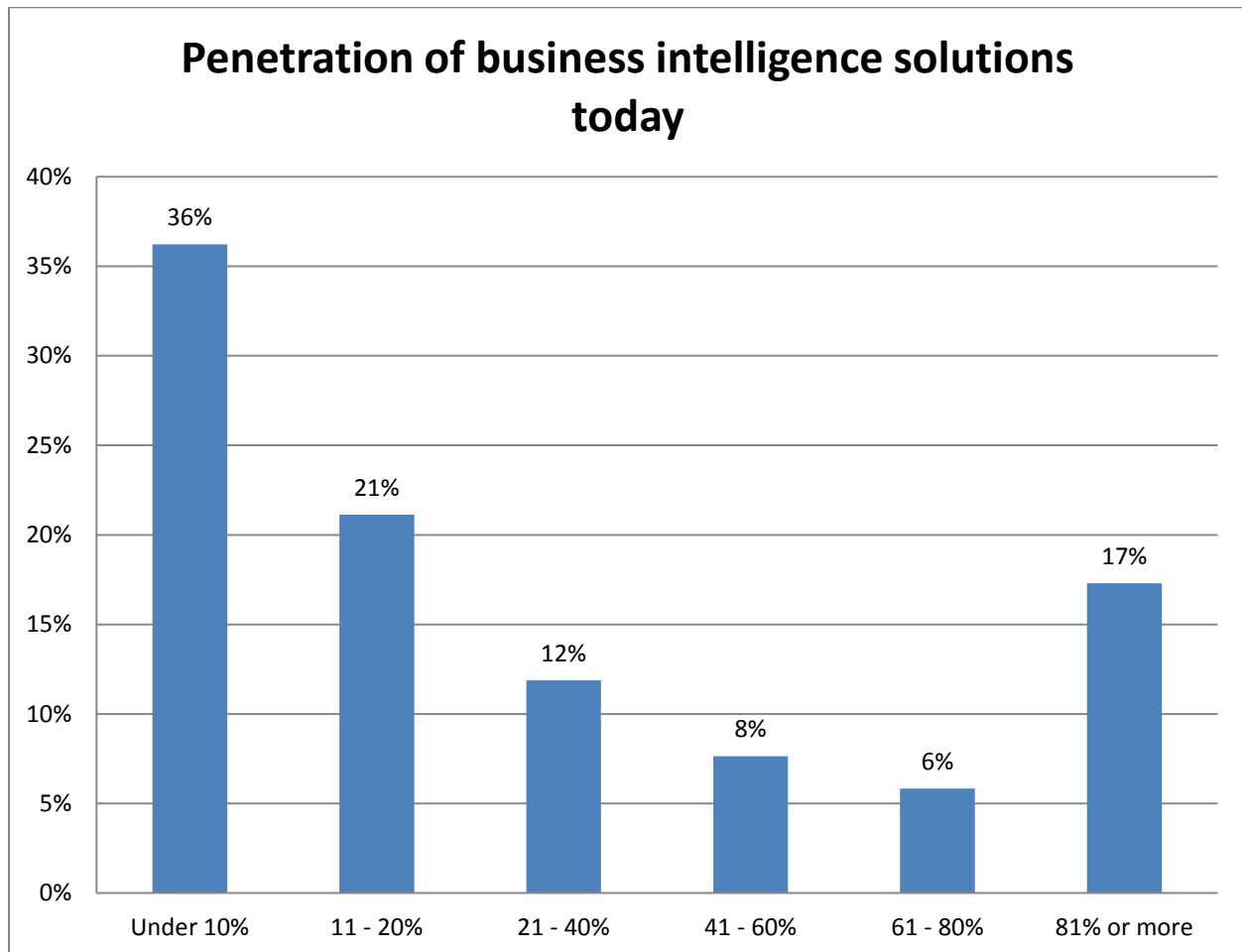
As was the case in 2013, respondents tell us of ambitious plans for extending user penetration in coming months. While 36 percent report less than 10 percent penetration today (above, fig. 19) fewer than half that number expect that will still be the case following one of the future time frames below (fig. 20). Except for those organizations with the lowest (under 10 percent penetration) expectations, higher levels of user penetration are expected to emerge over time. This was also the case in 2013; and though ambitions fell short, they reflect ongoing organizational desires to expand the user base of business intelligence.
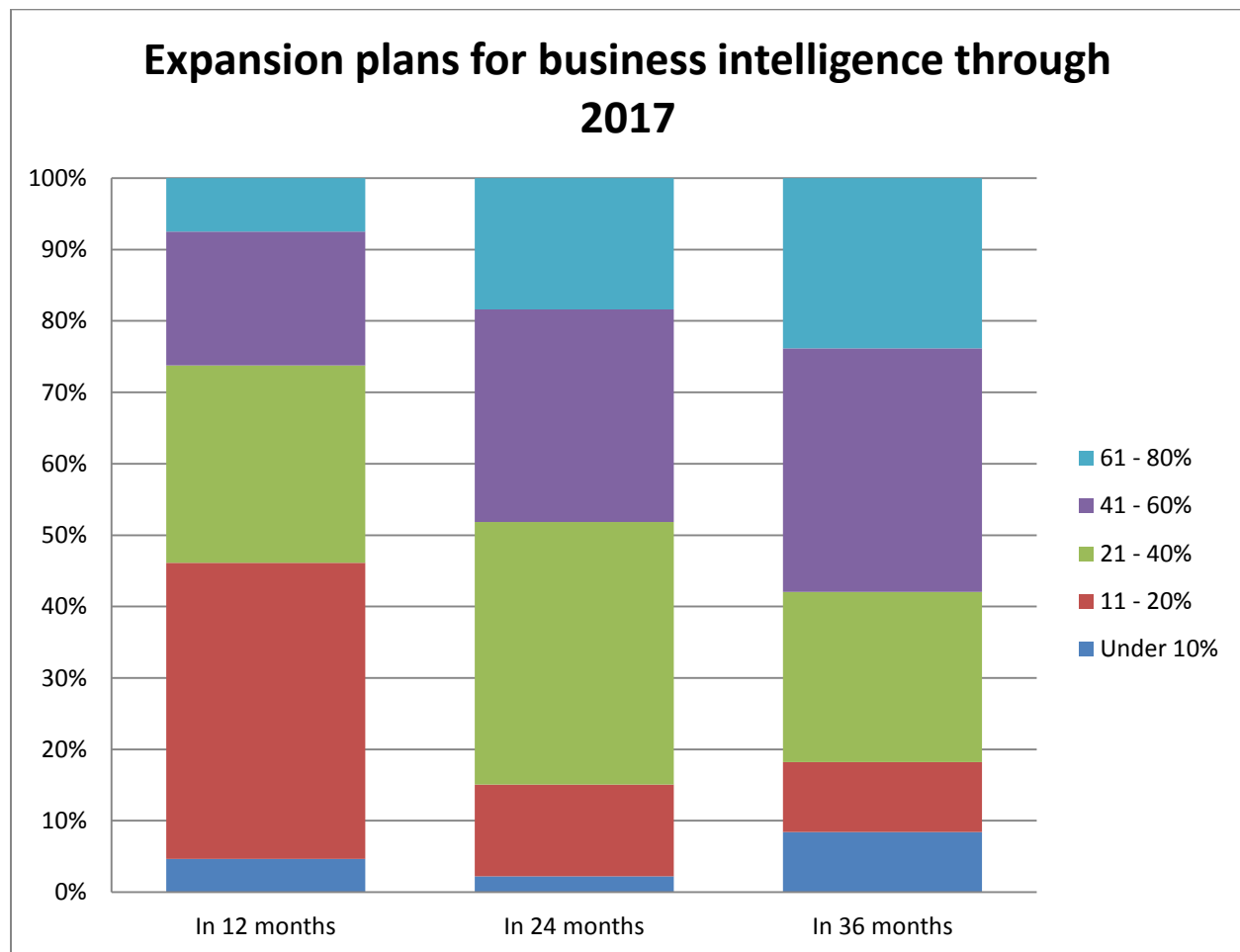
Figure 20. Expansion plans for business intelligence through 2017

Current Business Intelligence Penetration by Geography

Overall, EMEA reports slightly higher levels of organizational BI use than other regions (fig. 21). Very low penetration (<10 percent) is at or near 40 percent in all geographies except EMEA, where just under one-third report the lowest levels of use. Low-mid penetration (11-20 percent) is lower in North America than in other regions. EMEA has the greatest share of very high (>80 percent) penetration, followed by North America and Asia Pacific.
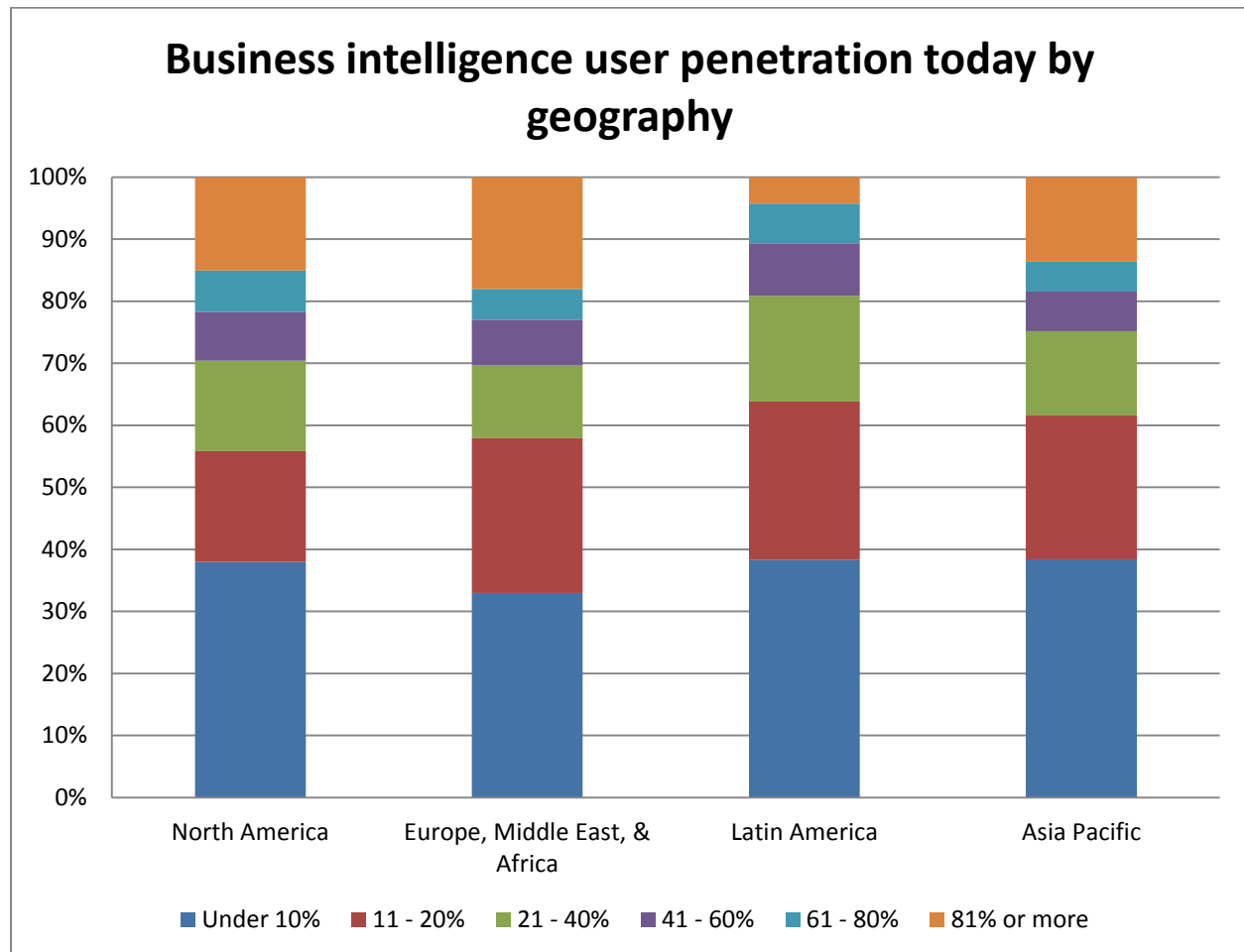
Figure 21. Business intelligence user penetration today by geography

Planned Business Intelligence Penetration by Geography

Based on user penetration today, all geographic regions expect the greatest 12-month gains in user penetration to occur in the low (11-20 percent) and low mid-tier (21-40 percent) ranges (fig. 22). A majority of respondents in all regions expect more than 40 percent of users to be provisioned with business intelligence within a 36-month time frame.
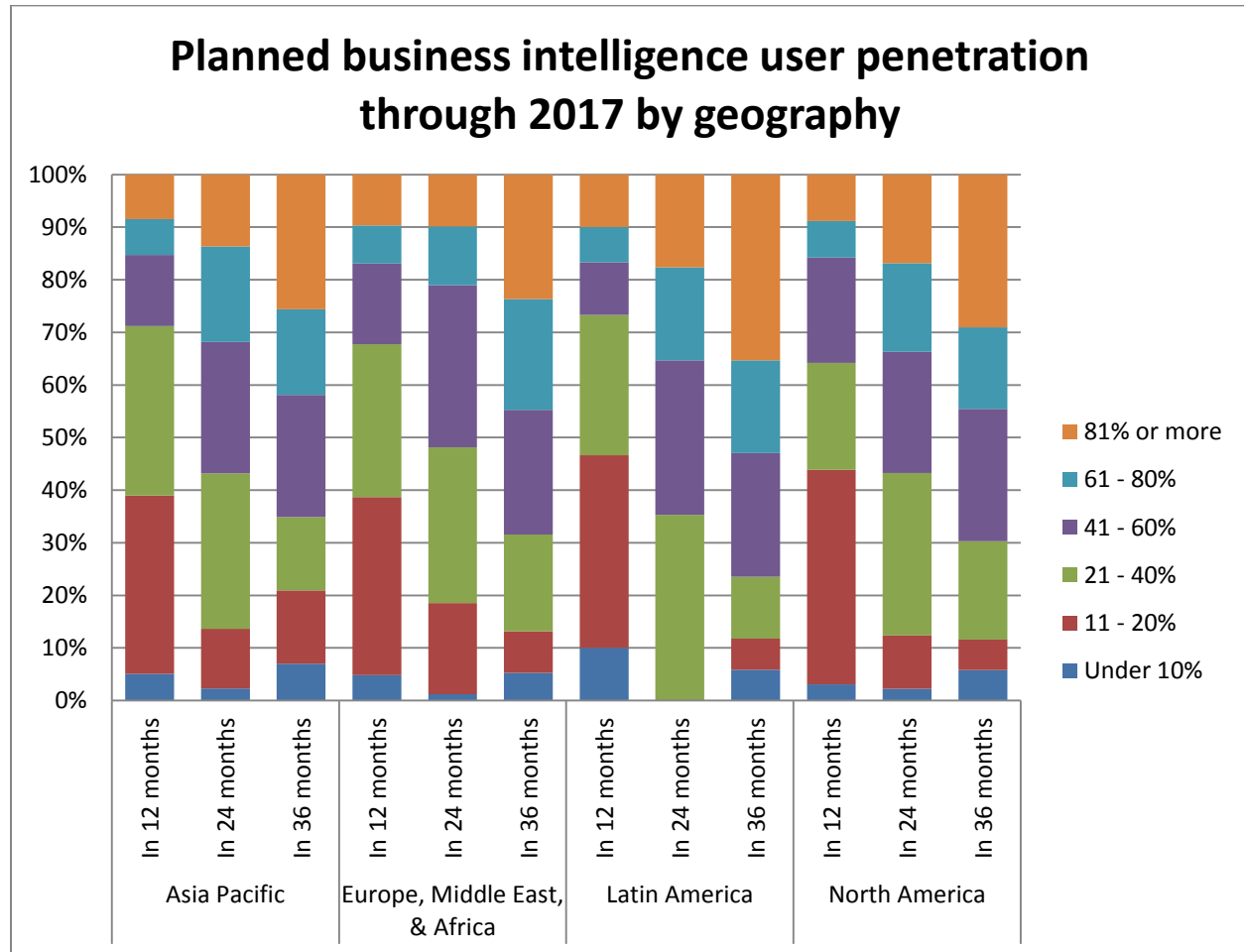
Figure 22. Planned business intelligence user penetration through 2017 by geography

Business Intelligence Penetration by Function

A large majority (> 70 percent) of executive management, finance, and information technology respondents report low user penetration of 10 percent or less today (fig. 23). All functions expect increased BI penetration in future time frames. More than 60 percent of finance and marketing expect the highest levels (> 80 percent) of BI penetration 36 months from now.
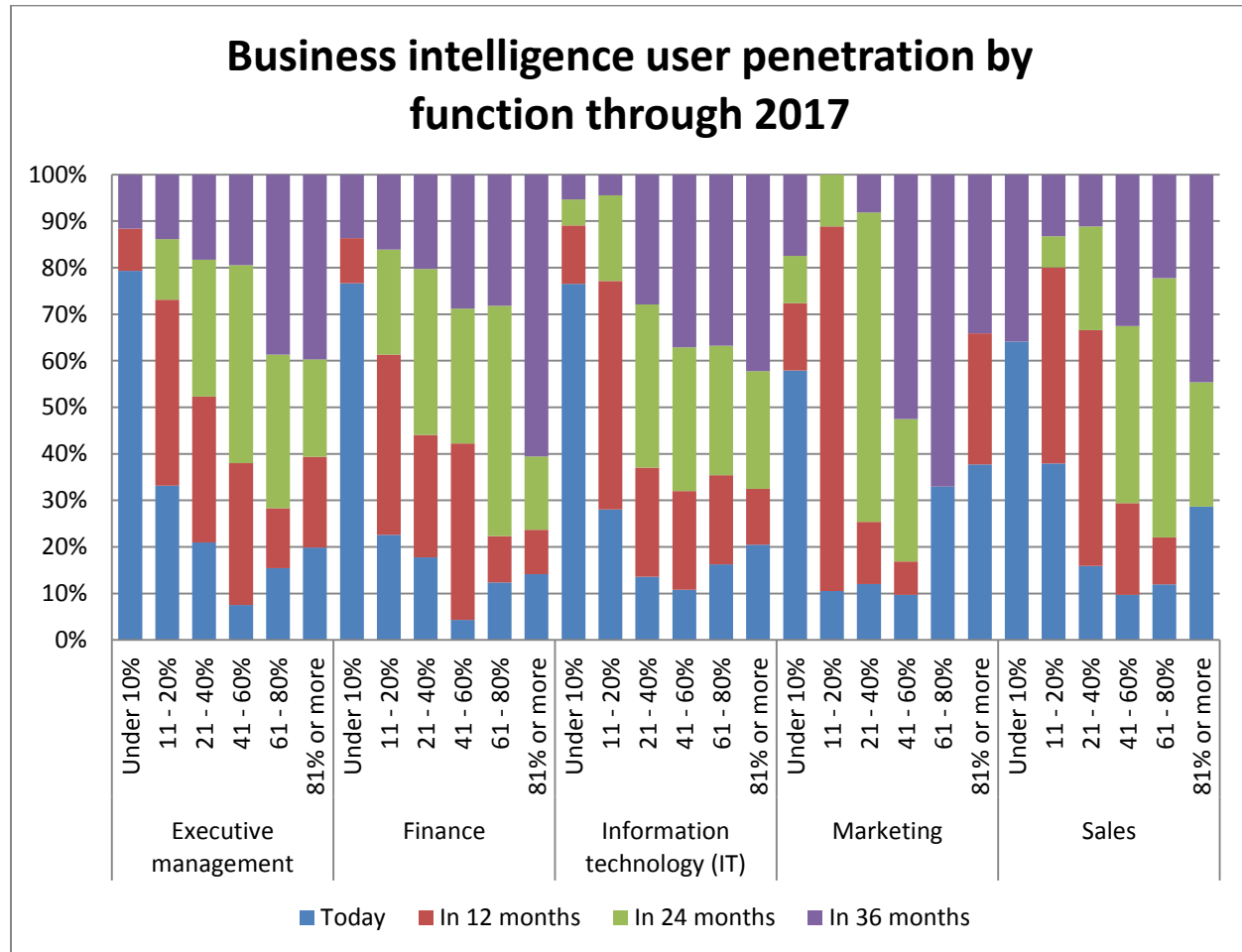

Figure 23. Business intelligence user penetration by function through 2017

Current Business Intelligence Penetration by Vertical Industry

Technology and financial services report the highest average penetration of business intelligence with 20 percent of technology (and almost as many financial services) organizations claiming the highest (> 80 percent) of audiences provisioned (fig. 24). About half of technology companies report greater than 21 percent BI penetration. Healthcare reports the lowest level of penetration (< 10 percent) but also an "elite" 10 percent with the highest (> 80 percent) levels of penetration.
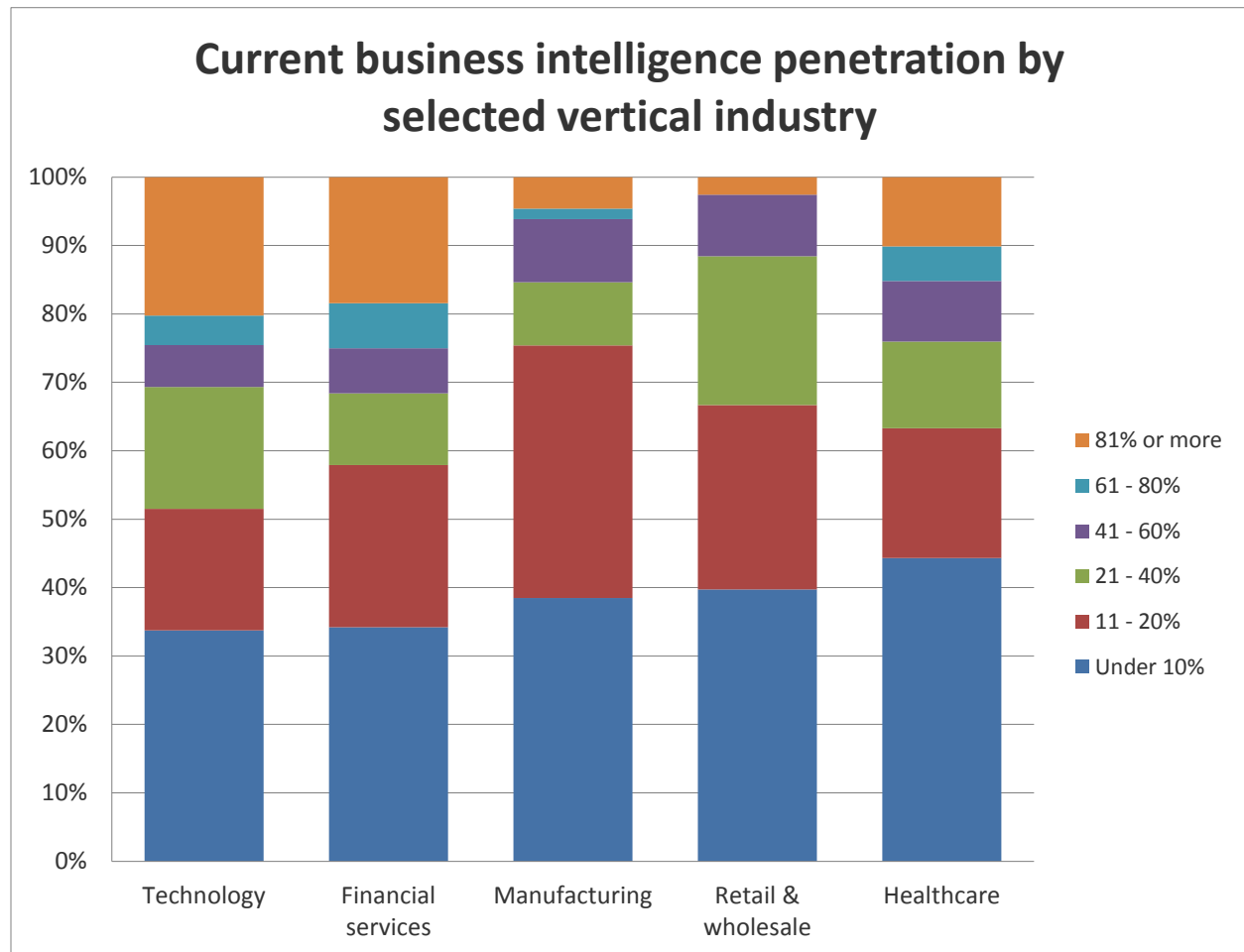

Figure 24. Current business intelligence penetration by selected vertical industry

Planned Business Intelligence Penetration by Vertical Industry

Financial services, retail/wholesale, and technology all plan to achieve the highest (> 80 percent) penetration in the next 36 months (fig. 25). Healthcare is ambitious in the near term, where 60 percent of respondents expect to boost BI penetration to the 11-20 percent range in the next 12 months and all but long-term laggards plan to exceed 20 percent within 24 months.
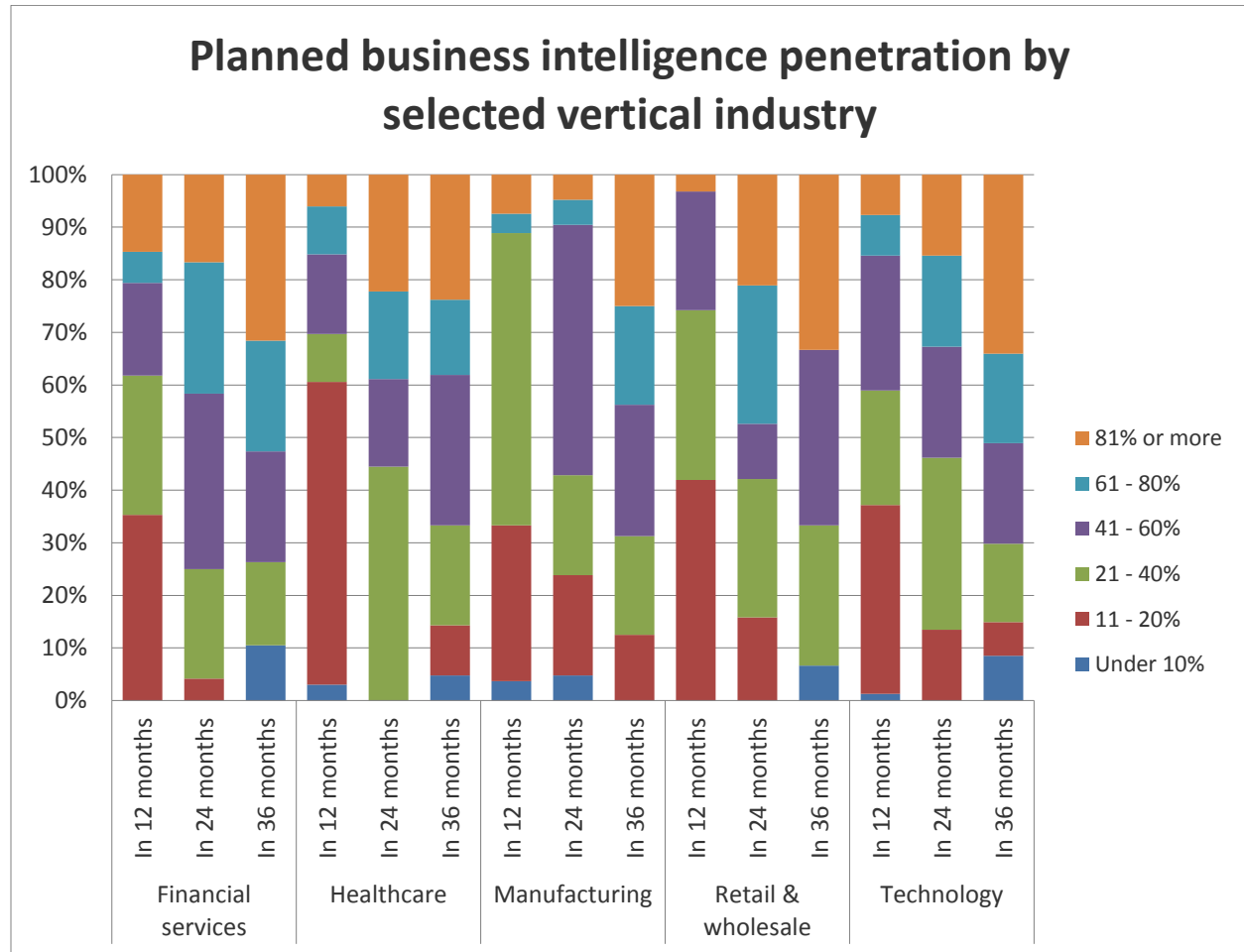

Figure 25. Planned business intelligence penetration by selected vertical industry

Current Business Intelligence Penetration by Organization Size

Very small and small organizations boast the highest average levels of BI penetration (fig. 26). Compared to very small organizations of 25 or fewer employees, twice as many (by percentage) with 100 or more employees report under 10 percent penetration. Organizations of 1 to 100 employees are two to three times more likely (by percentage) to have very high (> 80 percent) penetration compared to organizations of 101 or more. These findings are largely consistent with 2013 results.
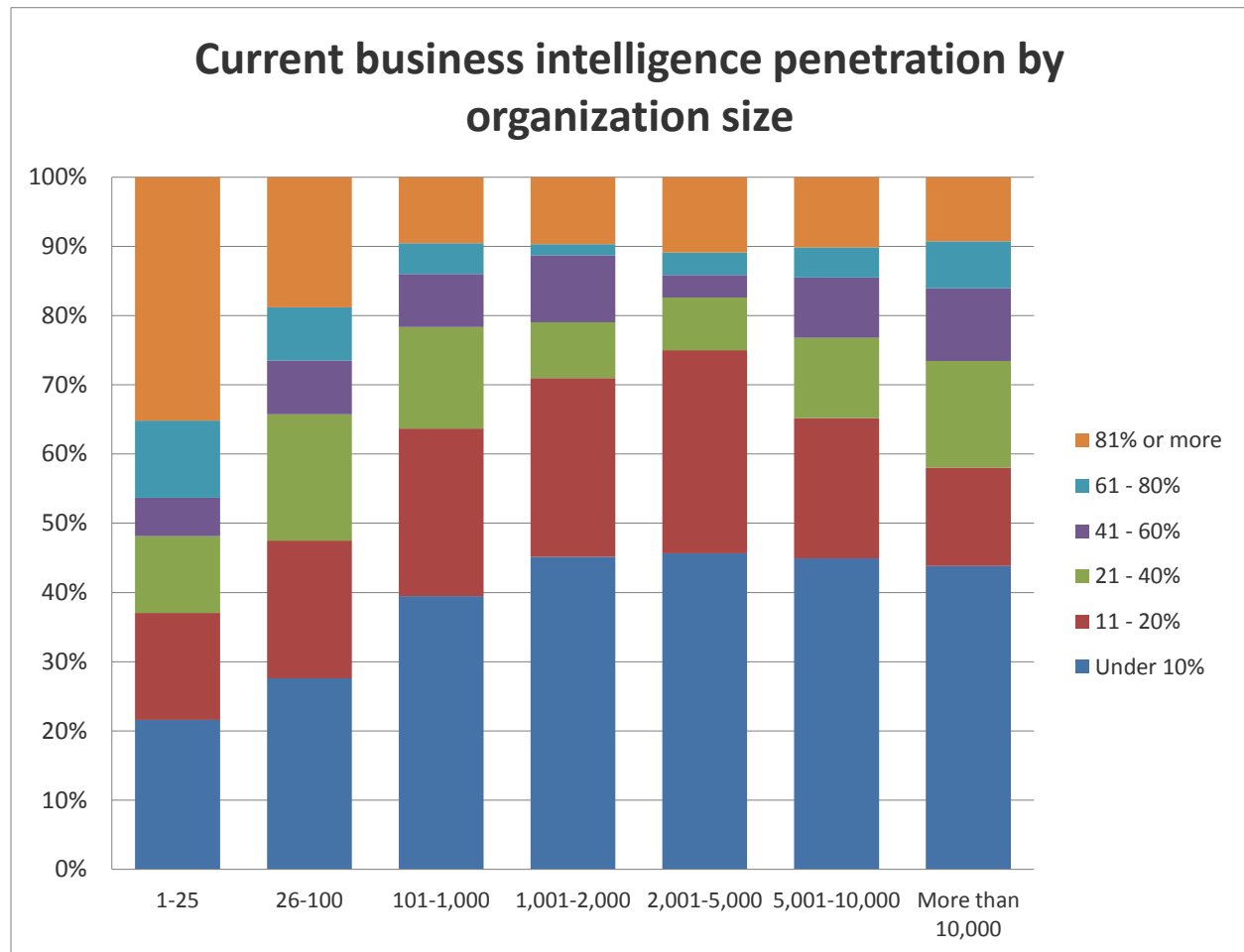

Figure 26. Current business intelligence penetration by organization size

Planned Business Intelligence Penetration by Organization Size

Future business intelligence penetration across organizations of different size is somewhat scattered and non-linear (fig. 27). The smallest (1-25) enterprises have the highest expectation of greater than 80 percent penetration within the next 12 months. Organizations of 1-1,000 employees expect the highest (> 80 percent) levels of penetration in the mid and longer time frames compared to organizations of 2,000 or more. A majority of very large (> 10,000) enterprises expect 11-20 percent penetration in the next 12 months.
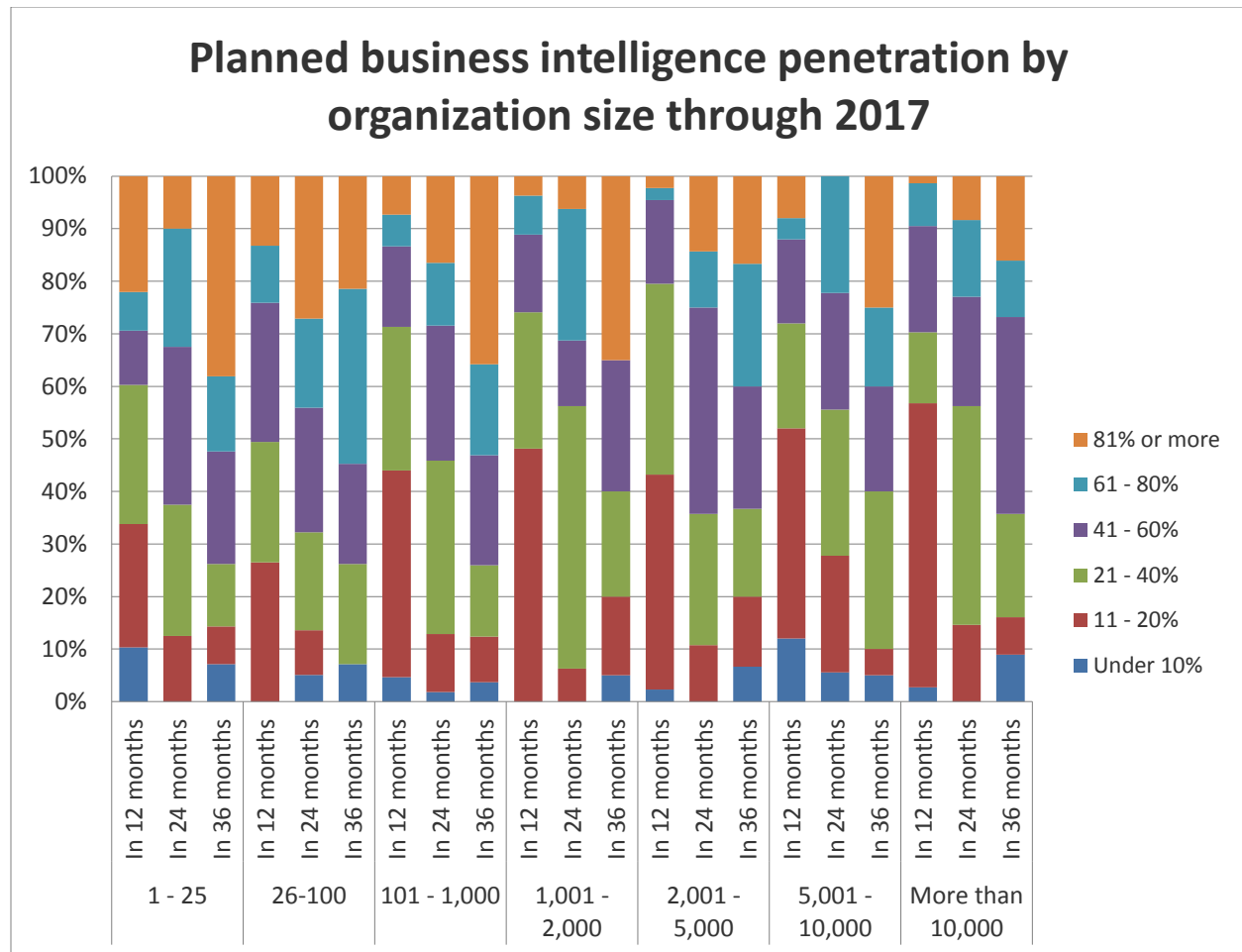

Figure 27. Planned business intelligence penetration by organization size through 2017

Number of Business Intelligence Tools in Use

Numbers of Business Intelligence Tools: Change from 2013

The use of multiple business intelligence tools in organizations continues and even profligates in some ranges (fig. 28). More than 50 percent of respondents reported the use of one or two tools. The organizations using the most tools (10 or more) grew in 2014 despite talk of consolidation; broadly, the number of BI tools used increases with organizational size.
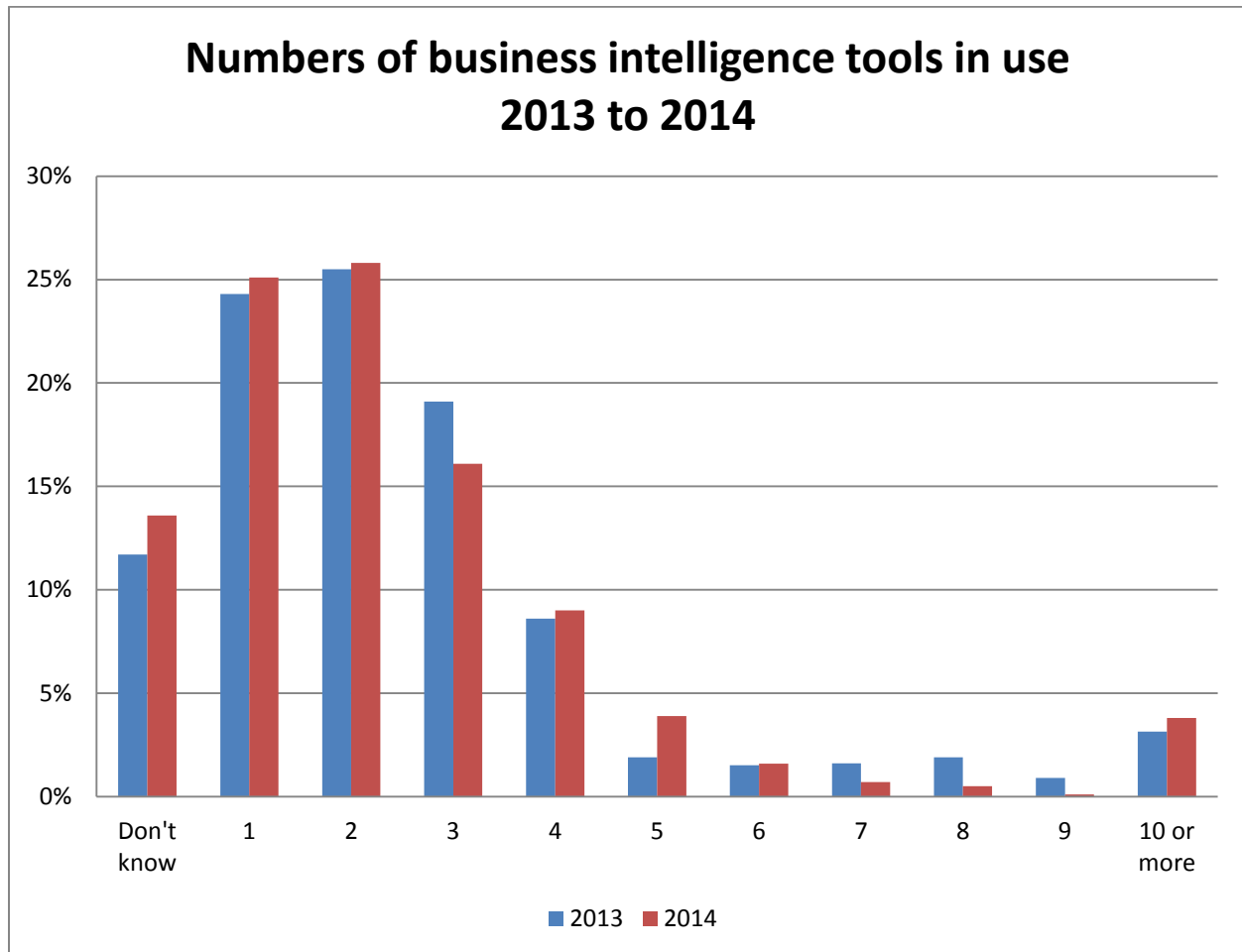

Figure 28. Numbers of business intelligence tools in use 2013 to 2014

Numbers of Business Intelligence Tools by Function

Executive management is most likely to report one to two BI tools (fig. 29). Management also has the greatest awareness of the tools in use. A majority of sales, IT, and finance report the use of one to three tools, though sales has the greatest lack of awareness. Marketing is least likely to report only one tool and is more likely to report three to many more tools in use.
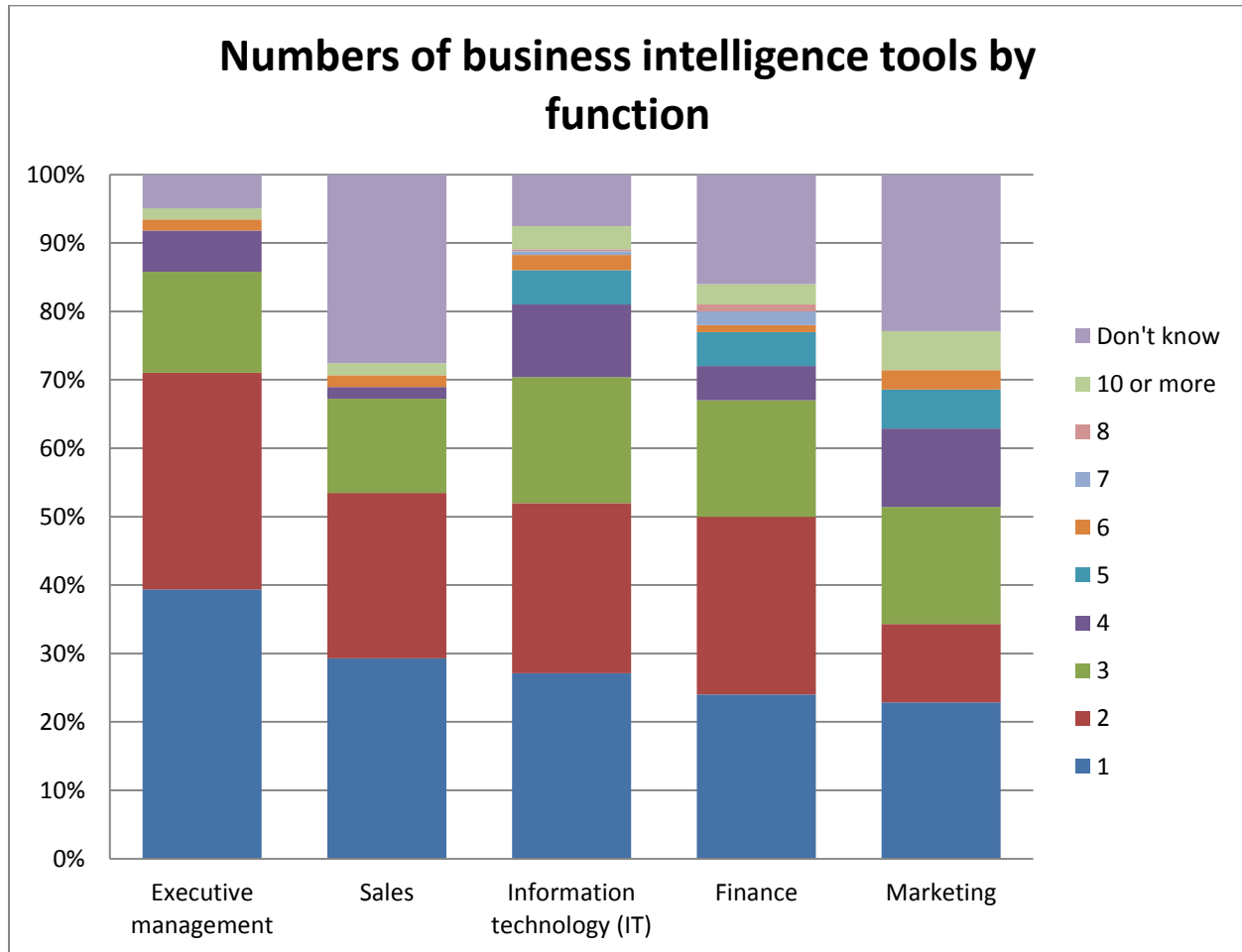

Figure 29. Numbers of business intelligence tools by function

Numbers of Business Intelligence Tools by Vertical Industry

Seventy percent or more respondents in the retail/wholesale, manufacturing, and technology industries report between one and three tools in use in their organization (fig. 30). One to three tools is also a majority (by percentage) across all industries. Almost 30 percent of healthcare respondents are unaware of the number of BI tools in use though a majority report more than one tool in use.
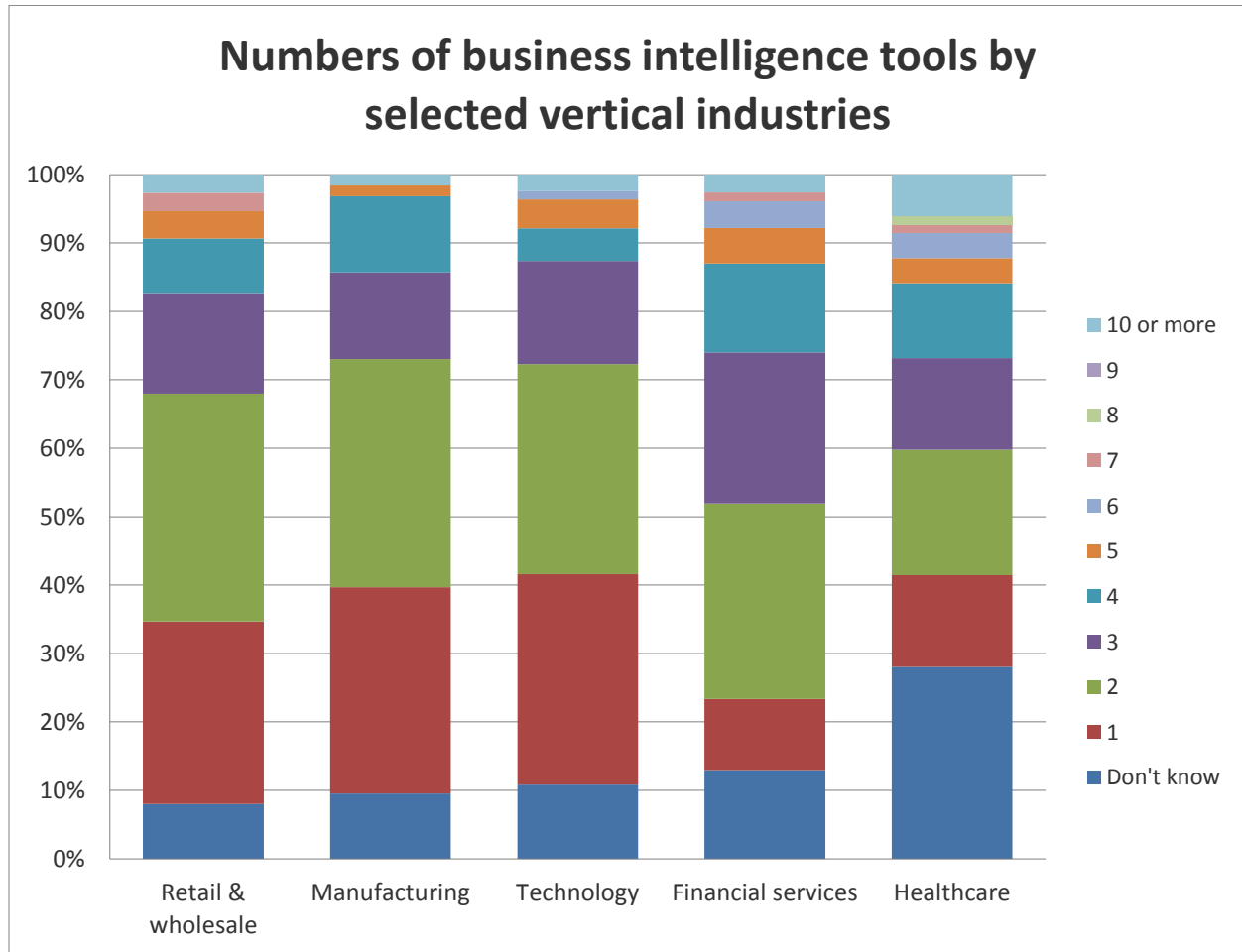

Figure 30. Numbers of business intelligence tools by selected vertical industries

Numbers of Business Intelligence Tools by Organization Size

Organizations of 1,000 or fewer employees are most likely to report one BI tool in use, though well over 70 percent report either one, two, or three tools. Larger organizations have the least awareness of the number of tools in use (fig. 31). Almost half of very large (> 10,000) organizations say four or more BI tools are in use in their organizations.
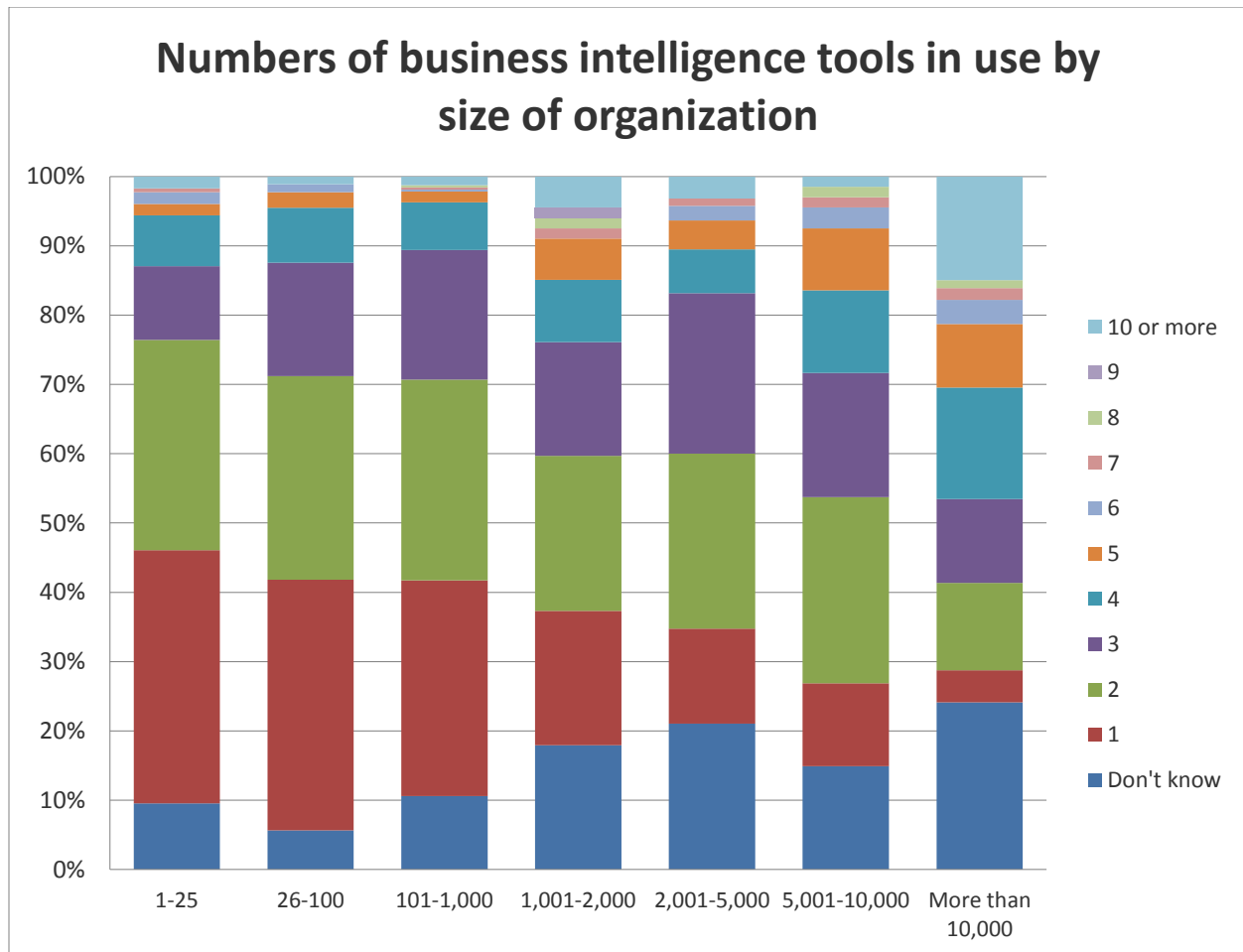

Figure 31. Numbers of business intelligence tools in use by size of organization

Technologies/Initiatives Strategic to Business Intelligence

In 2014, dashboards, end-user self-service, data warehousing and advanced visualization lead the list of technologies and initiatives strategic to business intelligence (fig. 32). These represent an ongoing emphasis on fundamental and traditional functionality. Operational integration and data discovery also represent fundamental BI focus; only after these do "newer" initiatives for mobile BI and embedded BI begin to emerge. Big data, text analytics, open source, social media and complex event processing represent the lowest ranked priorities. For 2014, we have begun tracking several additional initiatives/technologies: end-user data blending, location intelligence and pre-packaged applications.
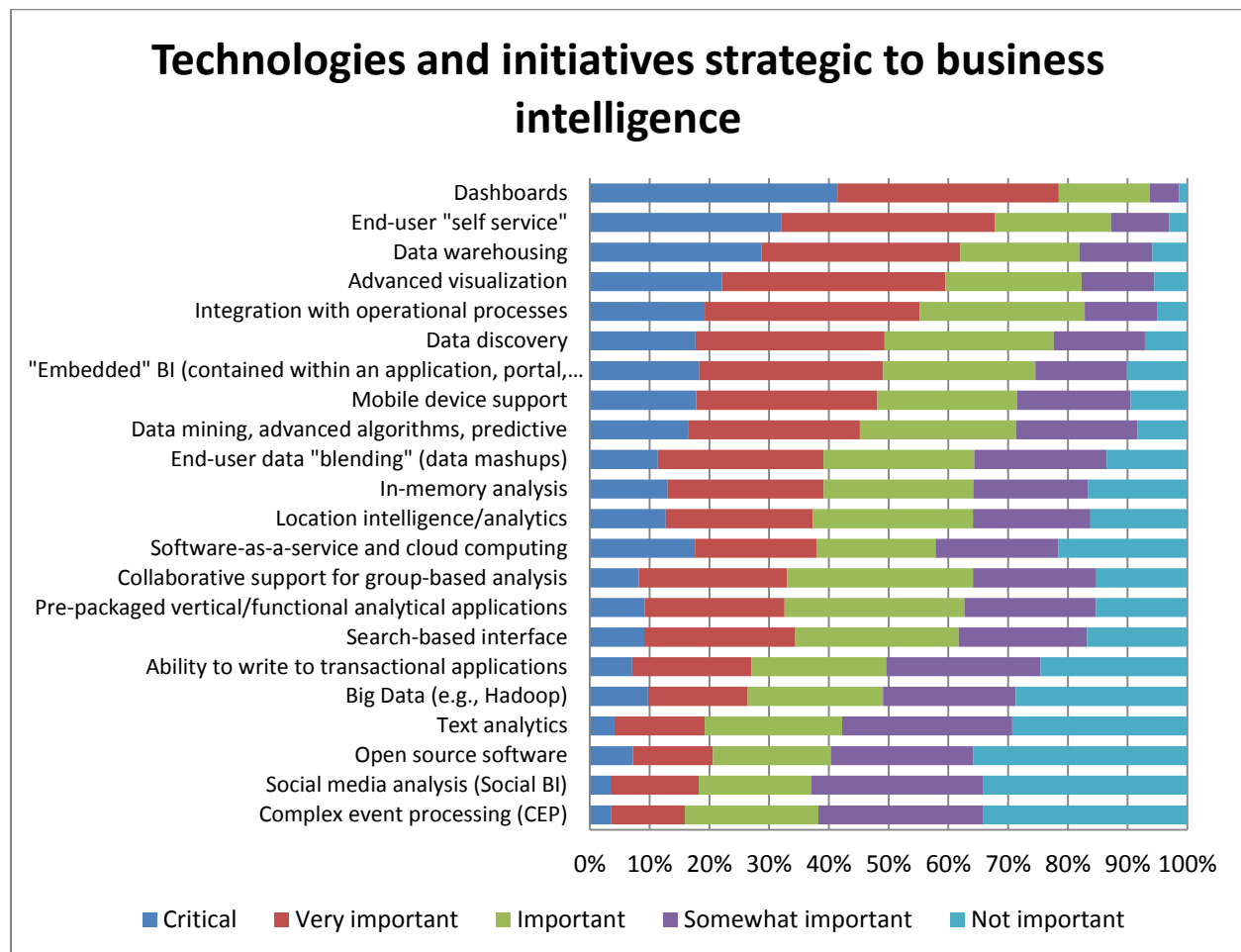

Figure 32. Related technologies and initiatives strategic to business intelligence

Technology Priority Changes from 2013

Sentiment regarding technology priorities ranks consistently with 2013 (fig. 33). While most remained constant, several changed position. In particular: cloud, embedded, and open source BI increased in standing, while data mining, social media analysis, search and CEP decreased.
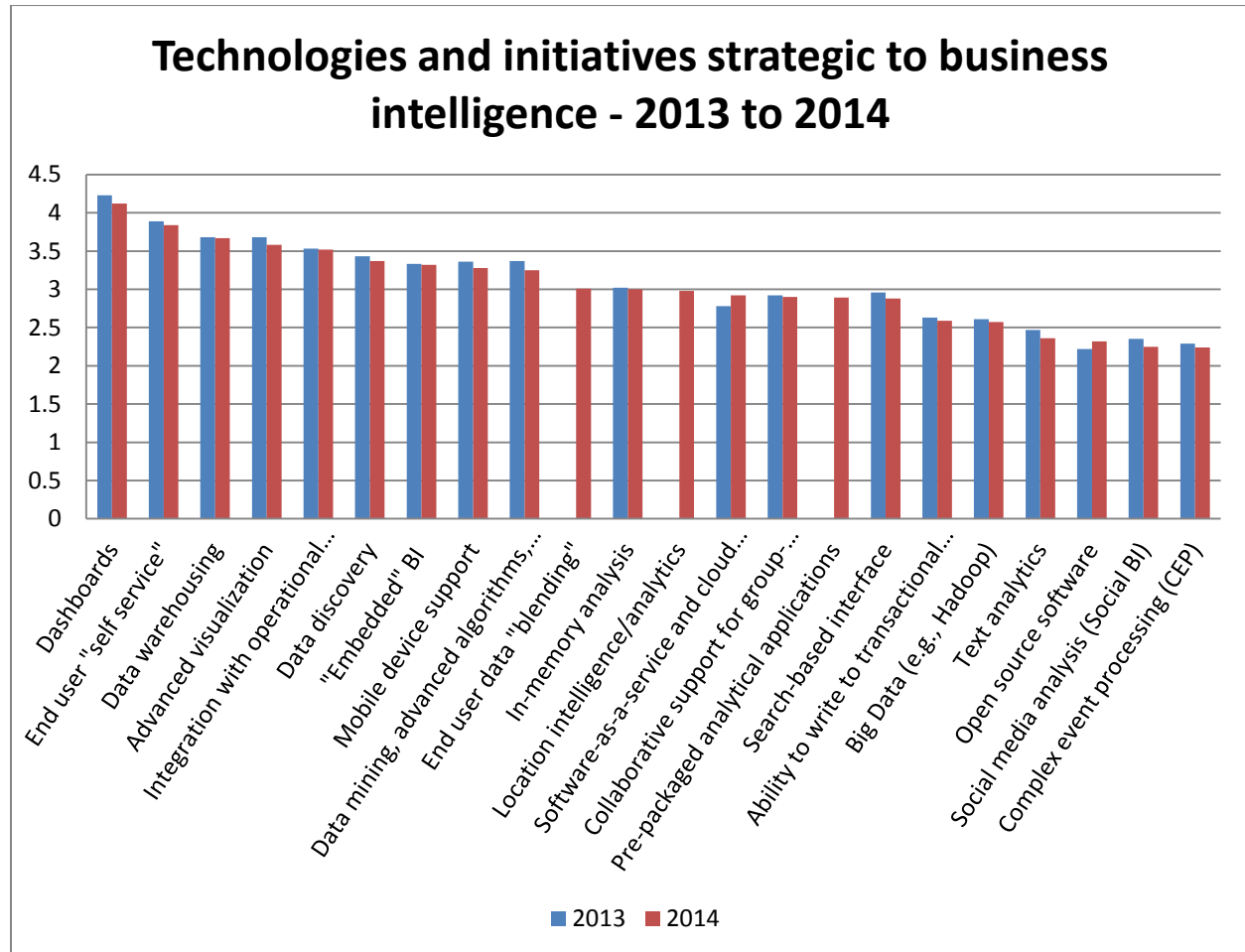

Figure 33. Technologies and initiatives strategic to business intelligence - 2013 to 2014 (weighted average)

Technologies/ Initiatives Strategic to Business Intelligence by Geography

Across global regions, Latin America reports outsized interest in specific technologies/initiatives compared to other geographies; these include advanced visualization, mobile device support, in-memory analysis, and collaborative support (fig. 34). EMEA trails in interest across many categories (though it also considers BI to be more engrained than other regions per fig. 21), noticeably in software-as-a-service/cloud.
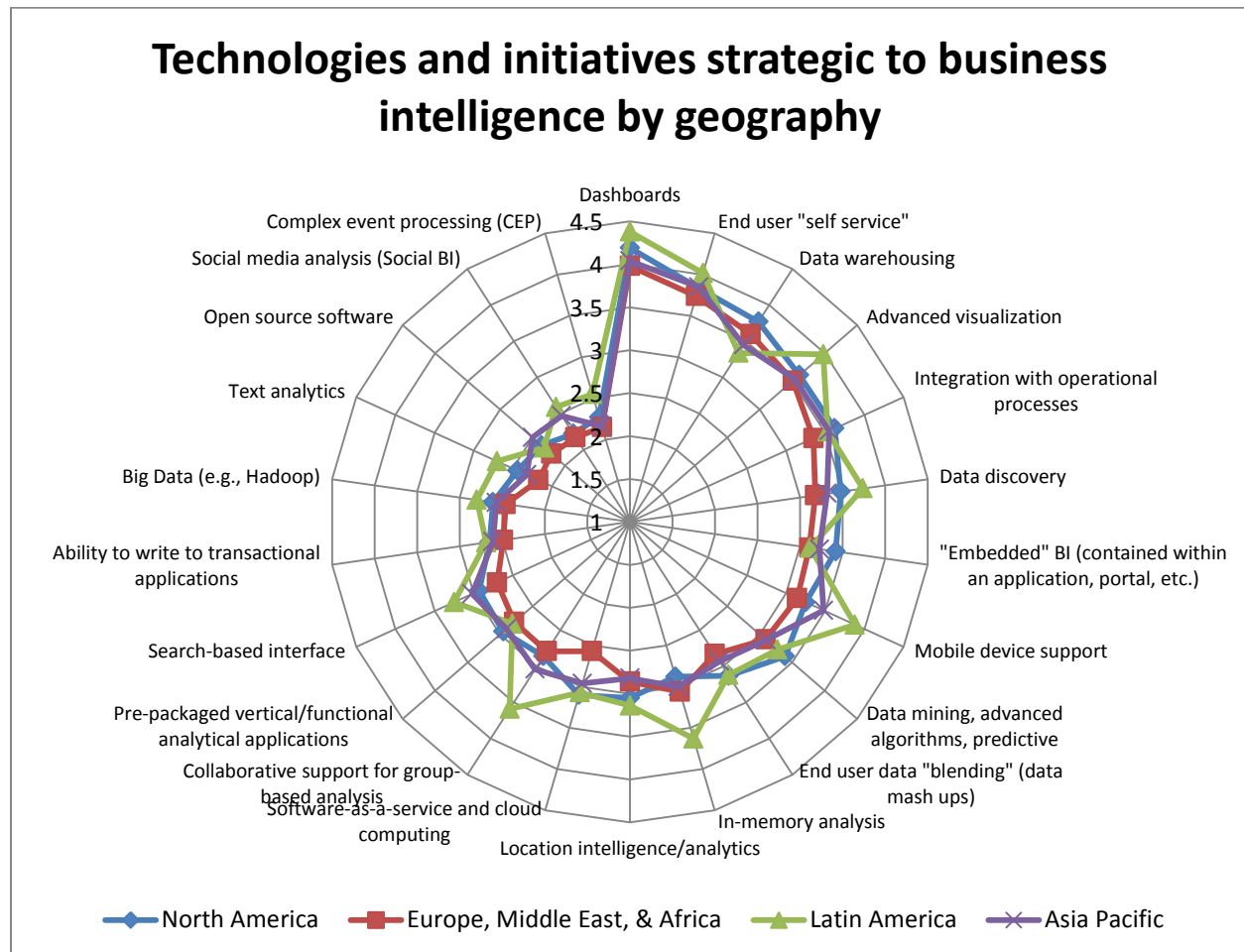

Figure 34. Technologies and initiatives strategic to business intelligence by geography (weighted average)

Technologies and Initiatives Strategic to Business Intelligence by Function

As might be expected, interest in functionality generally relates to functional responsibilities. Executive management has equal or greater interest in all areas of BI functionality, but stands out in user-friendly tools suited to their roles that include dashboards, advanced visualization, and in-memory analysis (fig. 35). Sales has high interest in mobile support while finance and marketing are less interested. Marketing's interest (compared to other functions) is highest in social media analysis, location intelligence, integration with operational processes, and advanced visualization. IT prioritizes the data warehouse more than other functions.
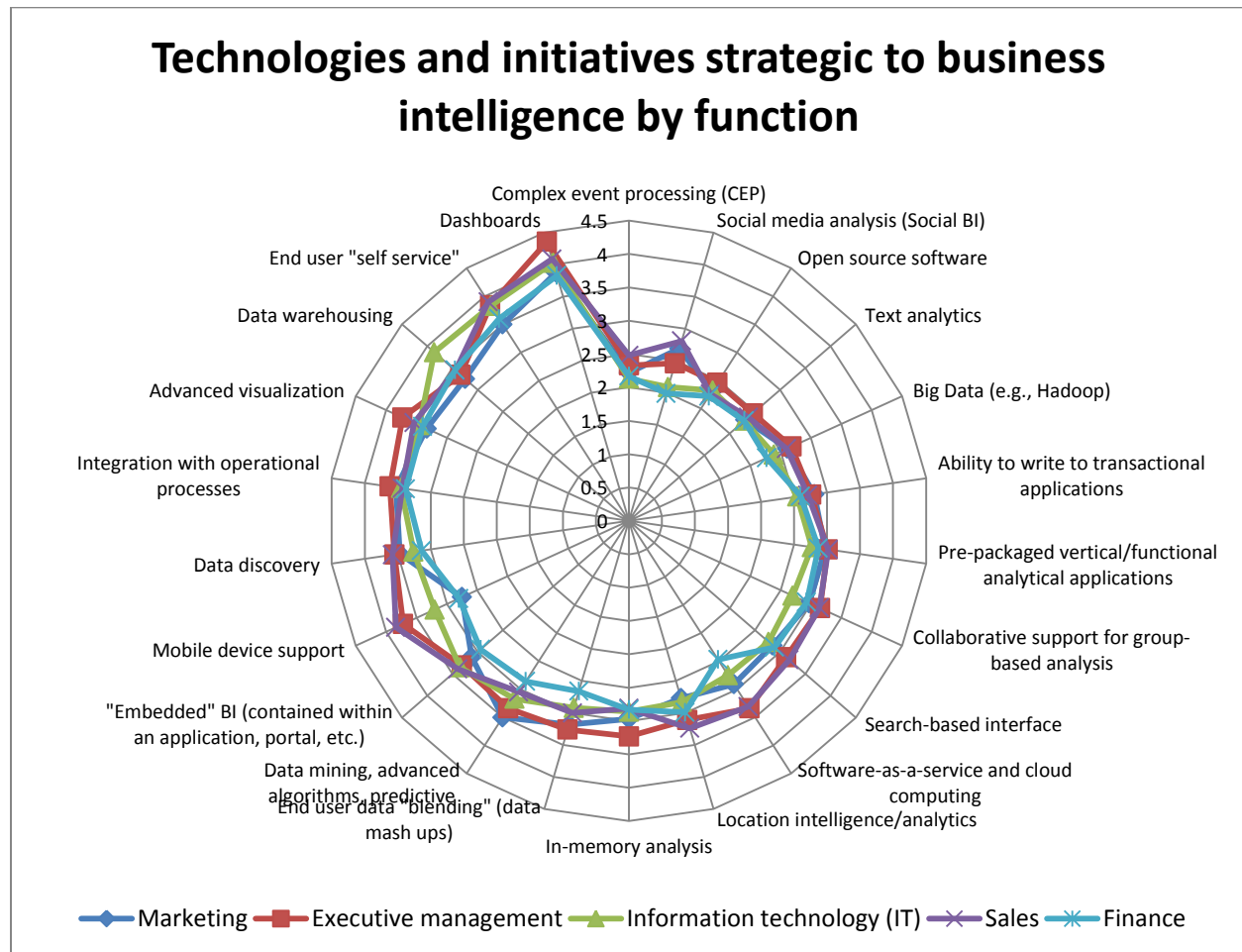

Figure 35. Technologies and initiatives strategic to business intelligence by function (weighted average)

Technologies and Initiatives Strategic to Business Intelligence by Vertical Industry
Healthcare, often described as an industry laggard in business intelligence maturity, shows outsized interest in a variety of priorities (fig. 36). These most notably include data warehousing, data mining, and location intelligence, likely in the form of asset tracking. The technology industry puts the greatest emphasis on software as a service / cloud computing. Manufacturing has the least interest in software as a service / cloud and is less enthusiastic about social media and big data.
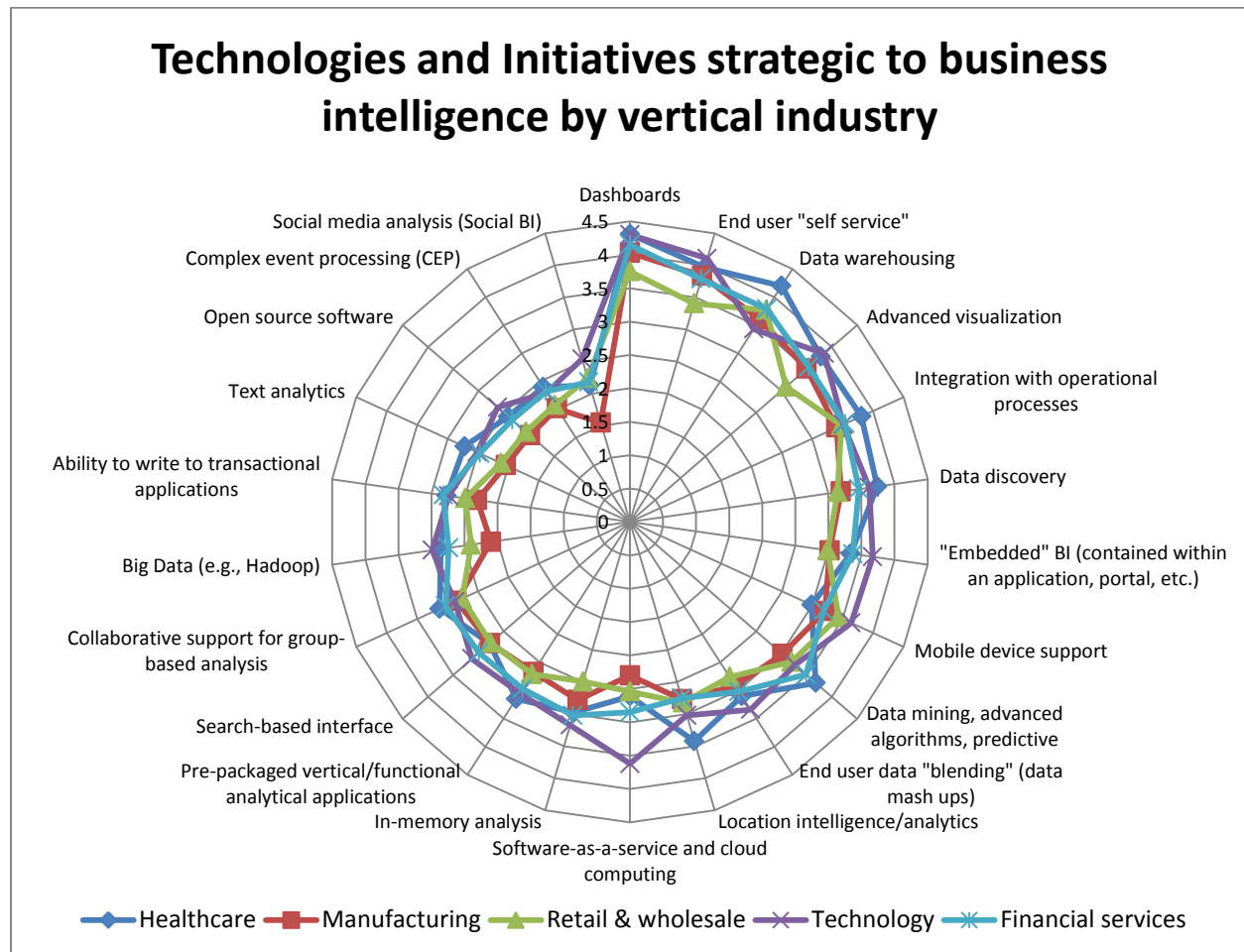

Figure 36. Technologies and initiatives strategic to business intelligence by vertical industry (weighted average)

Technologies and Initiatives Strategic to Business Intelligence by Organization Size

Priorities that vary by organizational size likely reflect both technology upgrades and exploration of new business intelligence opportunities (fig. 37). Very large organizations (> 10,000) show above-average interest in traditional and newer priorities that include data warehousing, advanced visualization, data discovery, data mining / advanced algorithms, in-memory, and big data. Small organizations of 100 or less are outliers with high interest in software-as-a-service / cloud areas (which would include options for pre-packaged software).
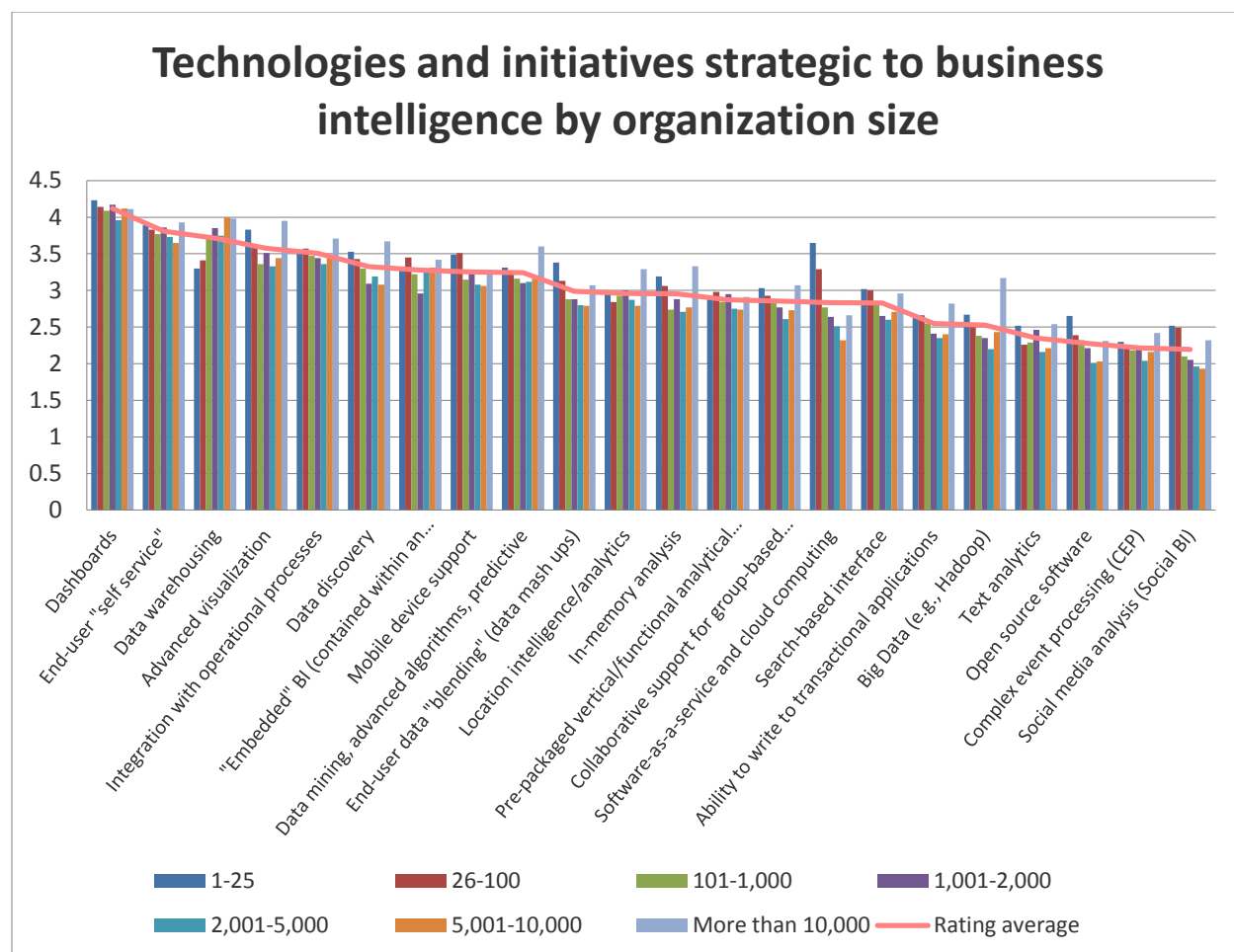

Figure 37. Technologies and initiatives strategic to business intelligence by organization size (weighted average)

Technologies and Initiatives Strategic to Business Intelligence — Small and Mid-Sized versus Large Enterprises

Technologies strategic to business intelligence track fairly consistently across small and mid-sized versus large organizations with a pair of exceptions (fig. 38). Large enterprises emphasize data warehousing more than smaller counterparts. And small to mid-sized enterprises show significantly greater interest in cloud-based BI, mobile BI and open source solutions.
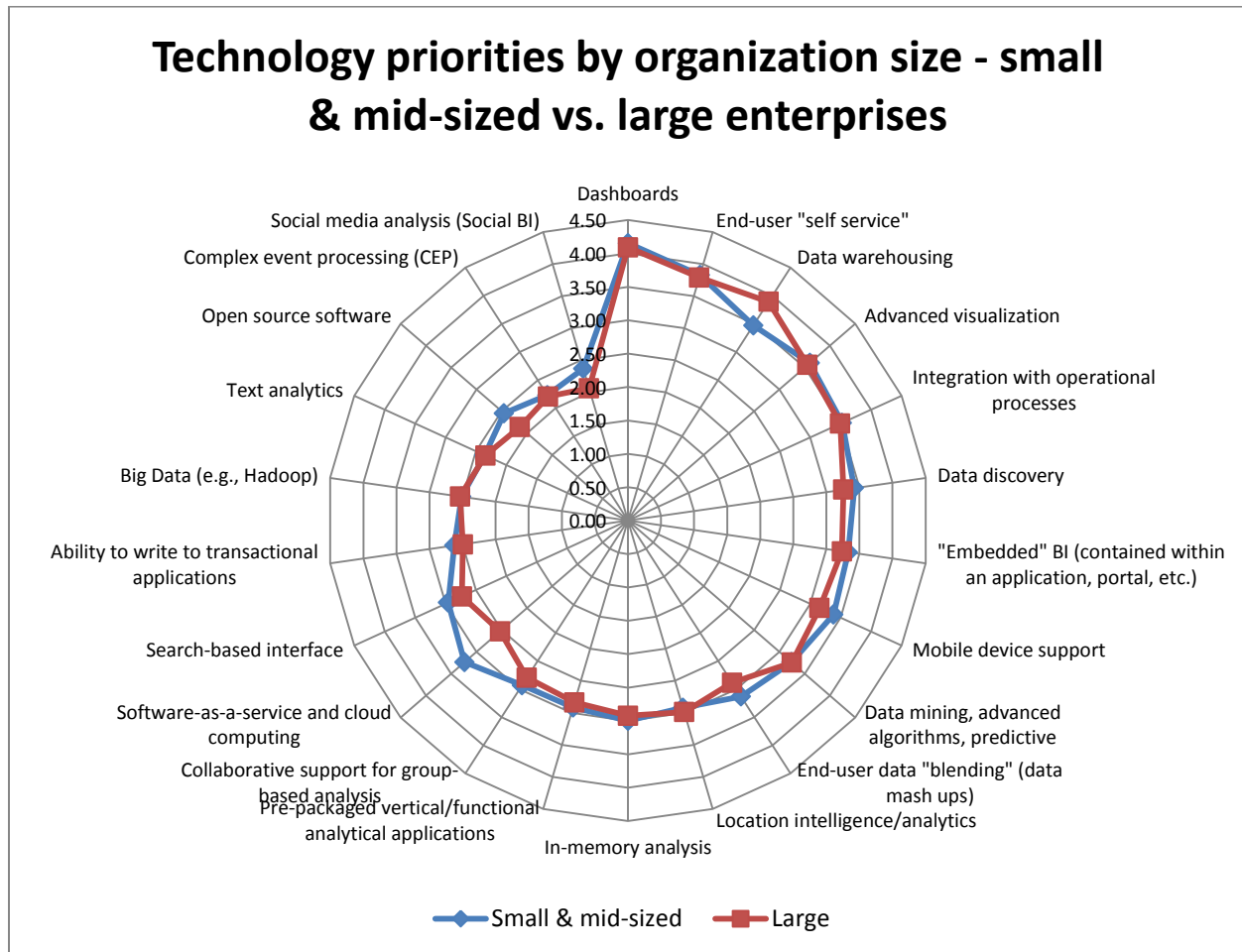

Figure 38. Technology priorities by organization size - small and mid-sized versus large enterprises (weighted average)

Business Intelligence and the State of Data

New for 2014, we polled respondents for attitudes and behaviors reflective of the "state of data" in their organizations (fig. 39). At an enterprise level, the greatest number (close to 40 percent) report availability of a common view of enterprise data with varying semantics by function and users. More than 30 percent report data as "truth" used with common filters, rules, and semantics. This means about 70 percent report advanced to very advanced data environments and practices. The remaining 30 percent describe departmental or highly fragmented data practices.
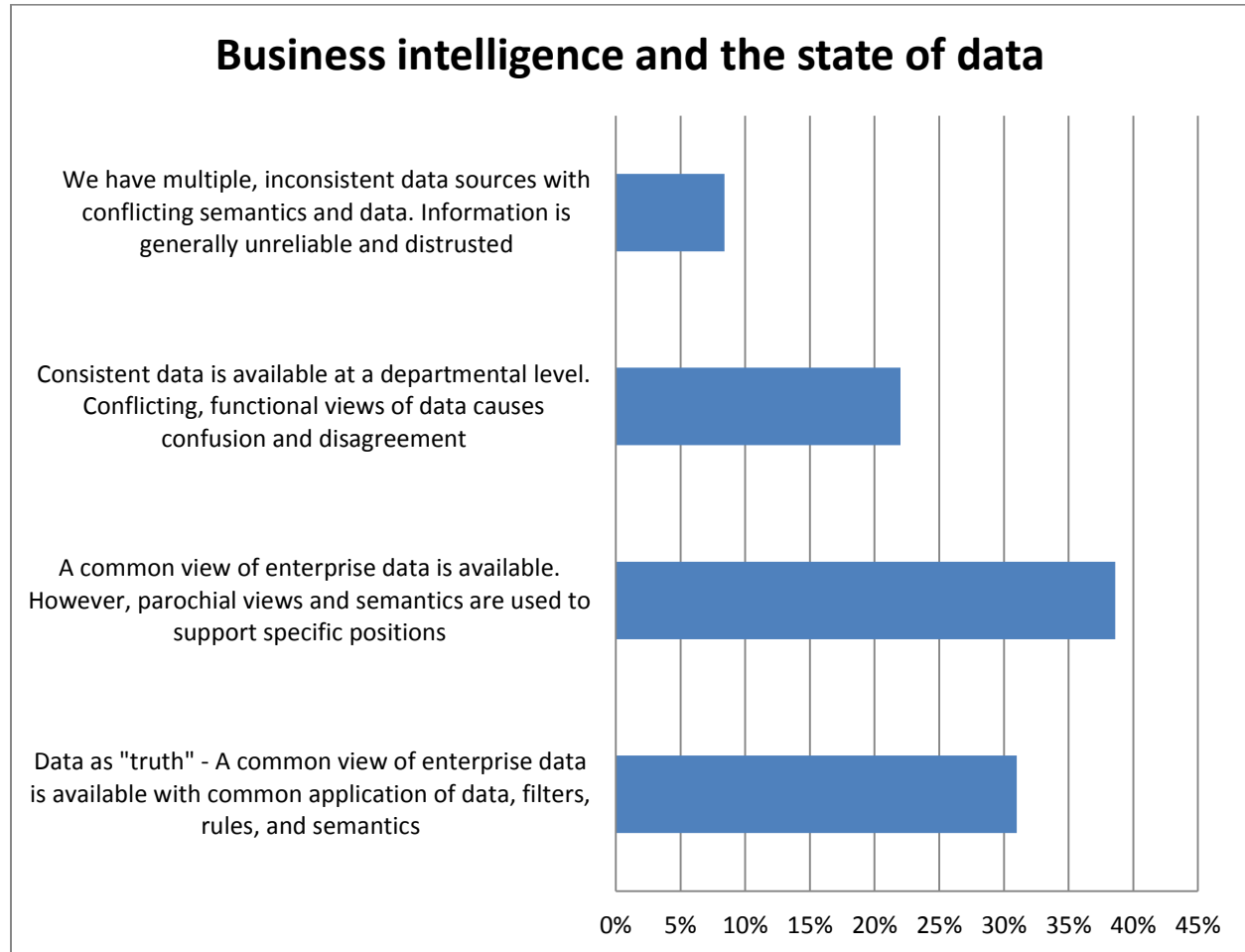
Business intelligence and the state of data

Category	Percentage
We have multiple, inconsistent data sources with conflicting semantics and data. Information is generally unreliable and distrusted	~8%
Consistent data is available at a departmental level. Conflicting, functional views of data causes confusion and disagreement	~22%
A common view of enterprise data is available. However, parochial views and semantics are used to support specific positions	~39%
Data as "truth" - A common view of enterprise data is available with common application of data, filters, rules, and semantics	~31%

Figure 39. Business intelligence and the state of data

Business Intelligence and the State of Data by Geography

Regional geographies vary in their estimations of organizational data practice maturity (fig. 40). Asia Pacific, EMEA, and North America are most likely to view their data environment as a common view, with parochial views and semantics used by different functions and departments. Latin America respondents are least likely to report multiple inconsistent data sources and almost 40 percent report the most advanced common view of data as "truth."
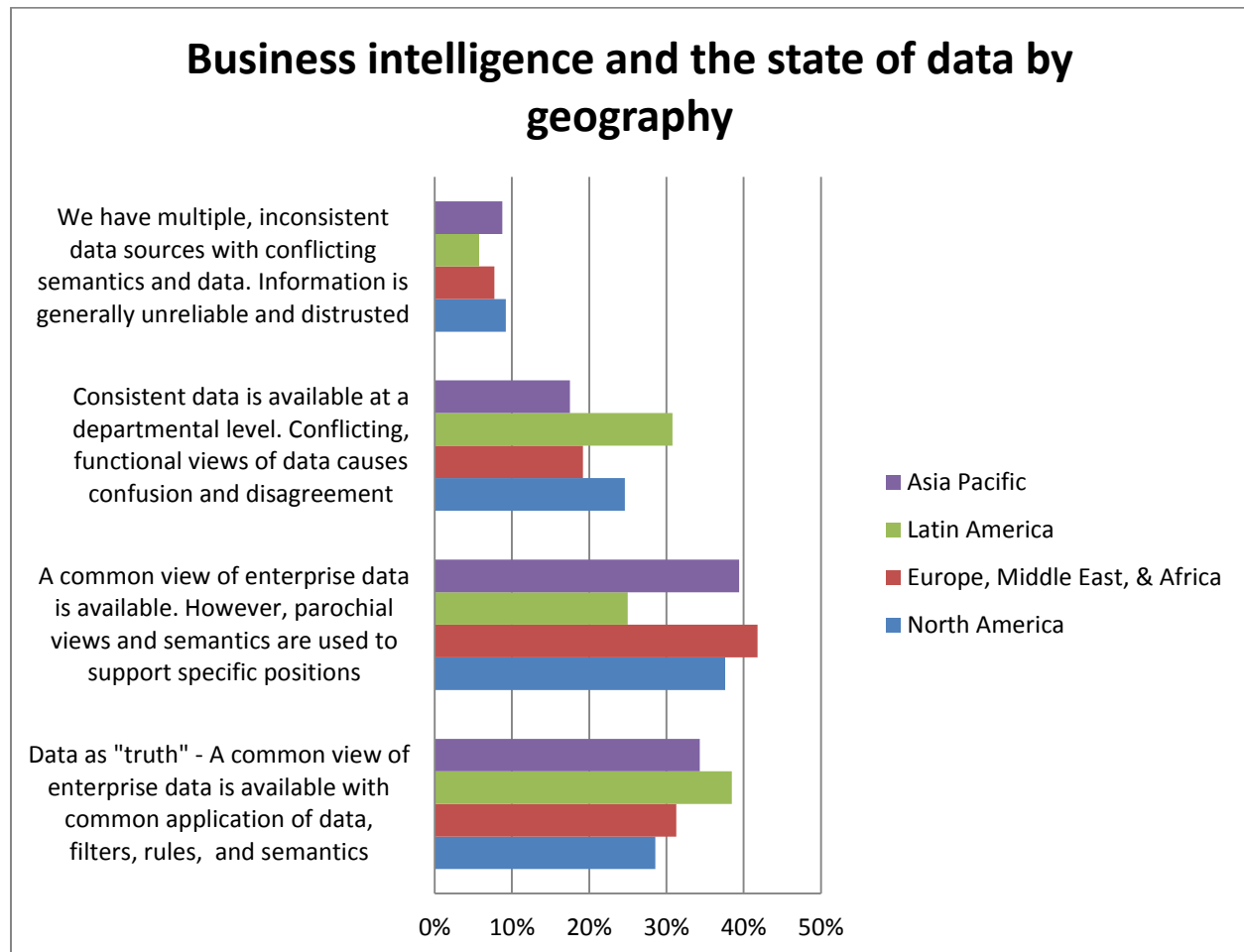

Figure 40. Business intelligence and the state of data by geography

Business Intelligence and the State of Data by Function

As would be expected, finance is most secure that assembled data reflects "truth" that is based on common rules and semantics (fig. 41). Executive management and sales appear most familiar with a common view of enterprise data that varies by parochial views. Marketing appears the most uncertain whether data is consistent by department or mostly consistent in a common view. Marketing, which most often responds to dynamic attitudinal data, is least likely to consider it "truth."
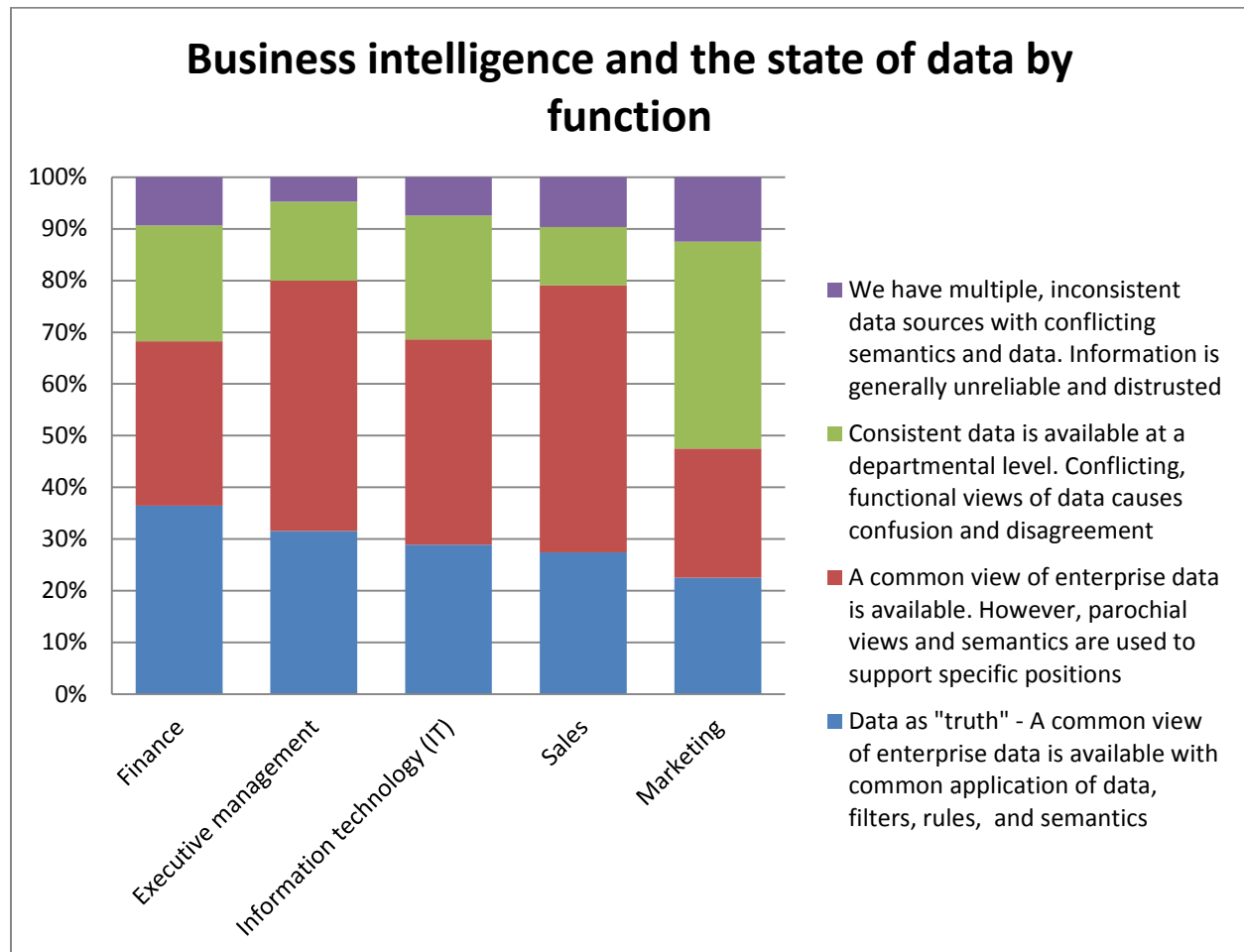
Figure 41. Business intelligence and the state of data by function

Business Intelligence and the State of Data by Vertical Industry

More than 70 percent of respondents in retail/wholesale, technology, and manufacturing report an advanced or very advanced state of data reflecting either data as "truth" or a common view of enterprise data with parochial views (fig. 42). Financial services reports the greatest percentage of multiple, inconsistent, conflicting data. Healthcare performs slightly better at maintaining consistent data at a departmental level.
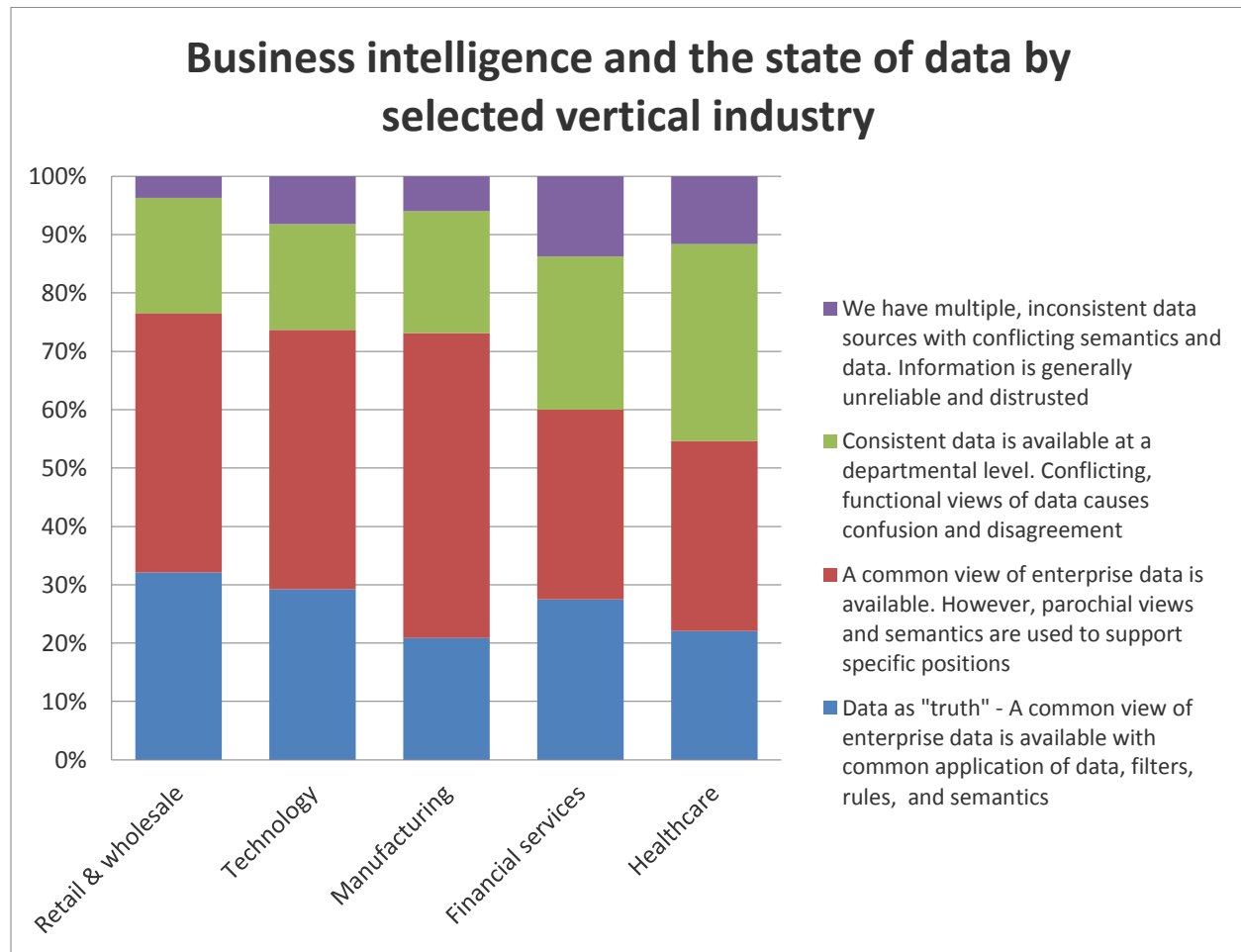

Figure 42. Business intelligence and the state of data by selected vertical industry

Business Intelligence and the State of Data by Organization Size

The state of data within the smallest of organizations is likely to be the most advanced with over 40% indicating "data as truth" (fig. 43). In contrast, the largest of organizations were more likely to indicate either "common /parochial views" or "departmental/functional views" (64%).
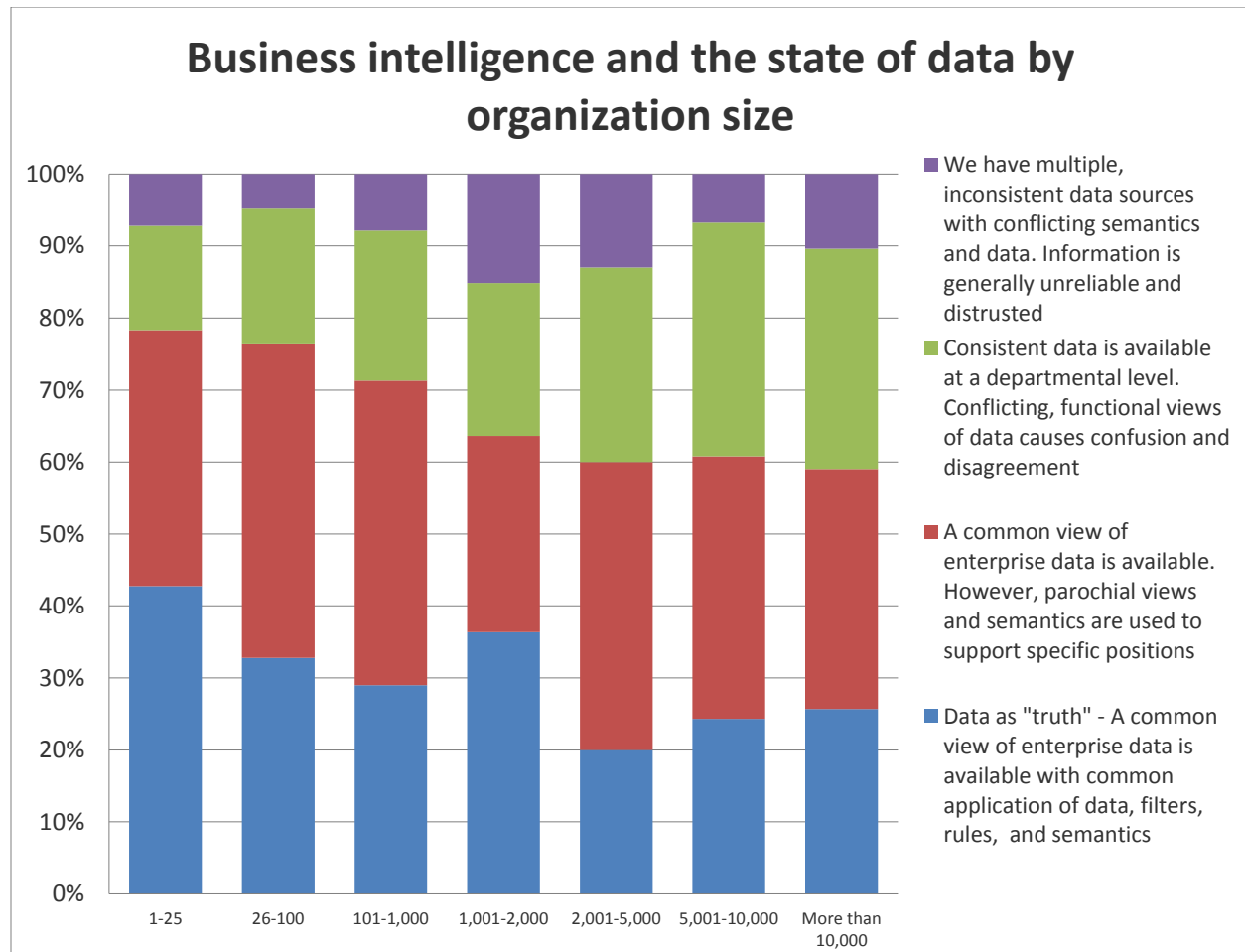

Figure 43. Business intelligence and the state of data by organization size

Business Intelligence and Action on Insight

New in 2014, action on insight reflects the degree to which organizations are taking data into use beyond passive reporting/observation (fig. 44). In this area respondents paint a very positive picture. Fewer than 15 percent report rarely leveraged or uncoordinated action. The greatest number (62 percent) leverage ad hoc or informal action on insights across functions, indicating a somewhat coordinated response to problematic issues and operational improvements. Twenty-four percent report "closed loop" processes and timely, concerted action, meaning that more than 85 percent of organizations consider themselves coordinated or very coordinated in this regard.
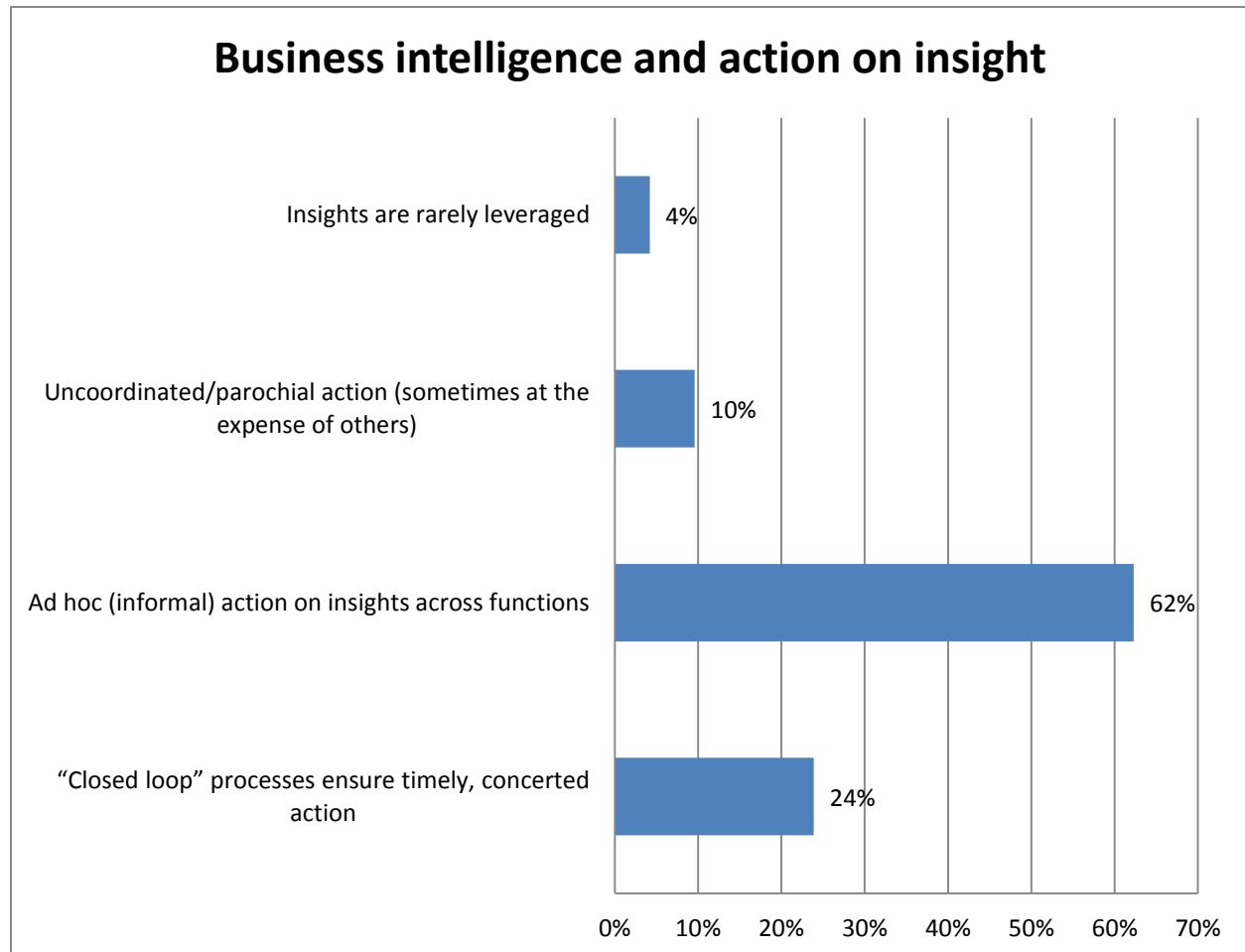
Business intelligence and action on insight

Category	Percentage
Insights are rarely leveraged	4%
Uncoordinated/parochial action (sometimes at the expense of others)	10%
Ad hoc (informal) action on insights across functions	62%
"Closed loop" processes ensure timely, concerted action	24%

Figure 44. Business Intelligence and action on insight

Business Intelligence and Action on Insight by Geography

Action on insight is mostly consistent across geographic regions (fig. 45). Slightly more respondents in Asia Pacific and North America report uncoordinated or ad hoc coordination across functions. As with the state of data, Latin America respondents are unlikely to report rarely leveraged insights and most likely to report "closed loop" well-orchestrated processes.
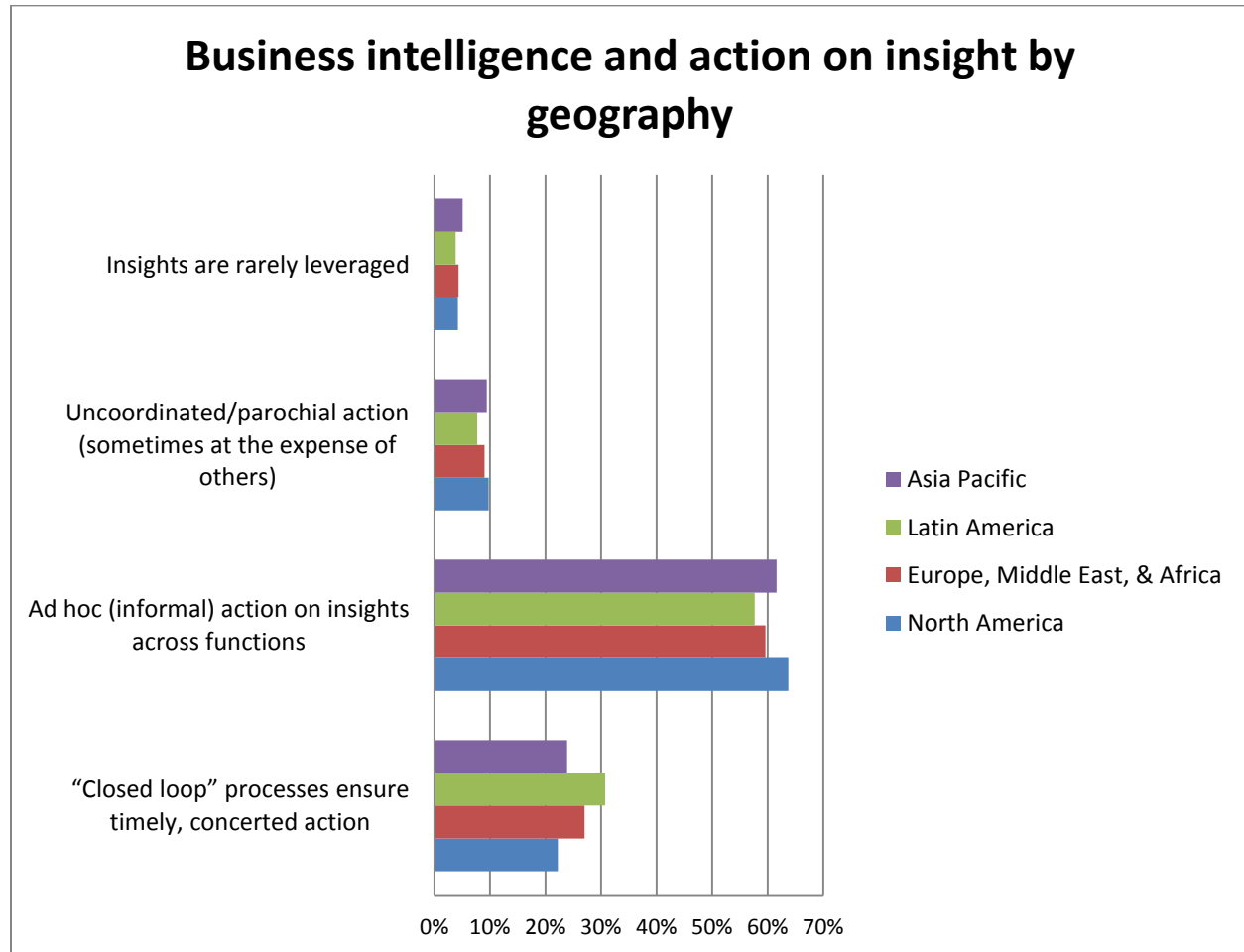

Figure 45. Business Intelligence and action on insight by geography

Business Intelligence and Action on Insight by Function

Finance claims the greatest ability to act on insight based on closed-loop processes that are reflective of carefully vetted data (fig. 46). More than 80 percent of all functions claim at minimum the ability to take ad hoc action across functions. Of the functions studied, IT was the least likely to coordinate action on insight (16%).
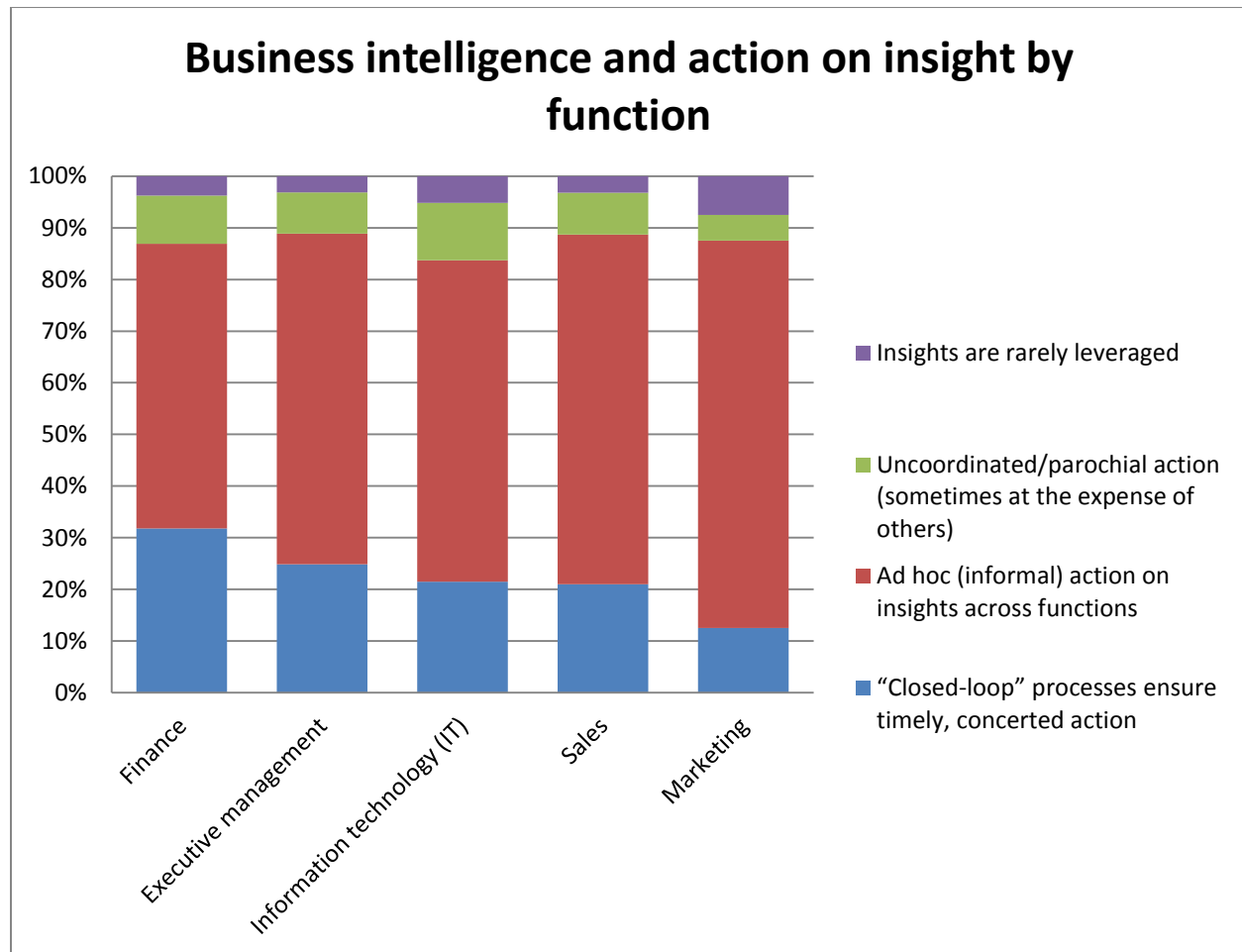
Figure 46. Business Intelligence and action on insight by function

Business Intelligence and Action on Insight by Vertical Industry

Industries generally exhibit high confidence in their ability to take action on insight and fewer than 10 percent of all respondents from any industry say insights are rarely leveraged (fig. 47). Very advanced "closed loop" processes range from almost 30 percent in financial services to more than 20 percent in manufacturing. Healthcare is the most reserved in its professed ability to execute on insight.
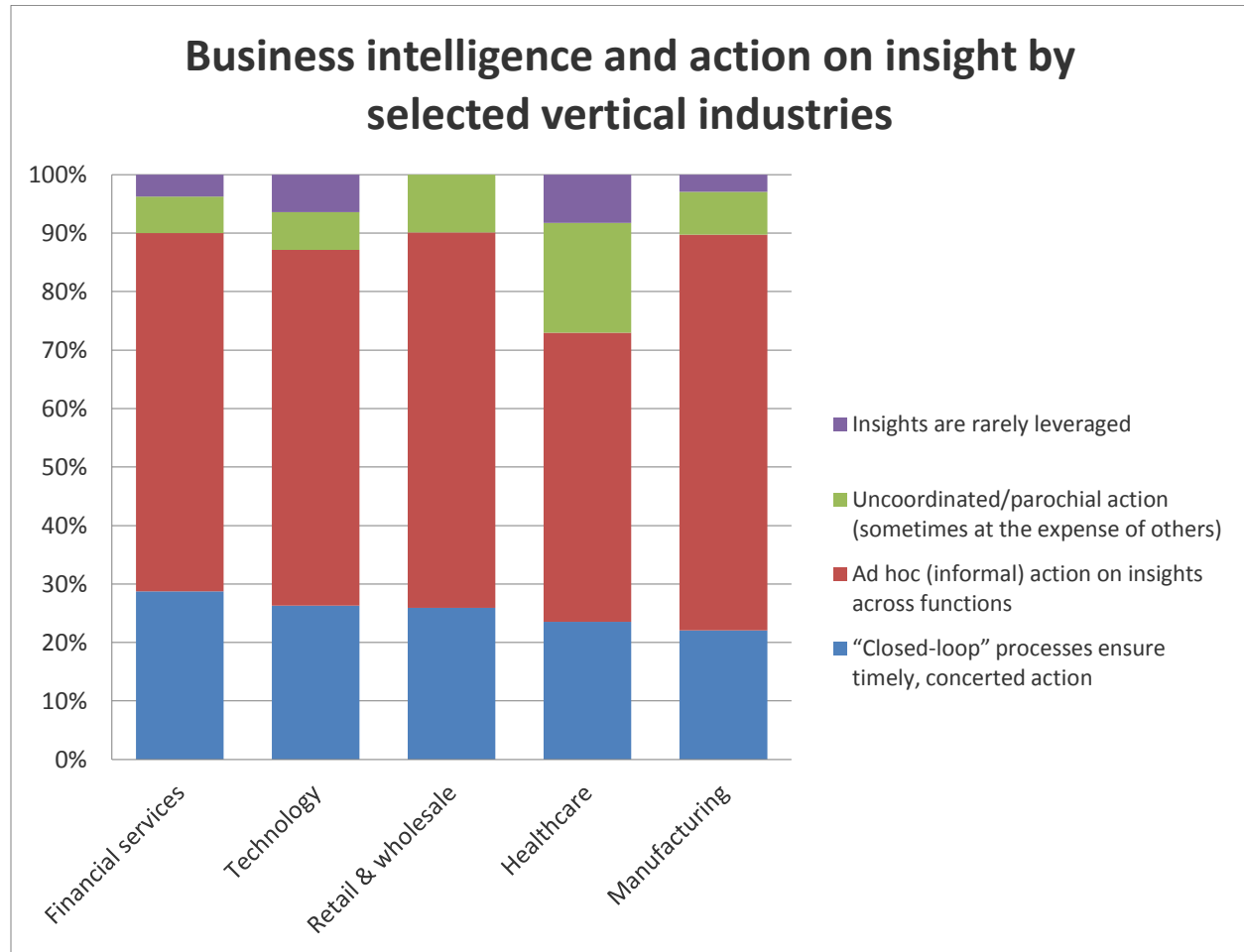
Figure 47. Business Intelligence and action on insight by selected vertical industries

Business Intelligence and Action on Insight by Organization Size

Organization size does not greatly affect the ability to take action on insight (fig. 48). Large and very large enterprises (> 2,001 employees) are more likely to report their abilities uncoordinated or parochial. Five percent or fewer of organizations of any size say insights are rarely leveraged.
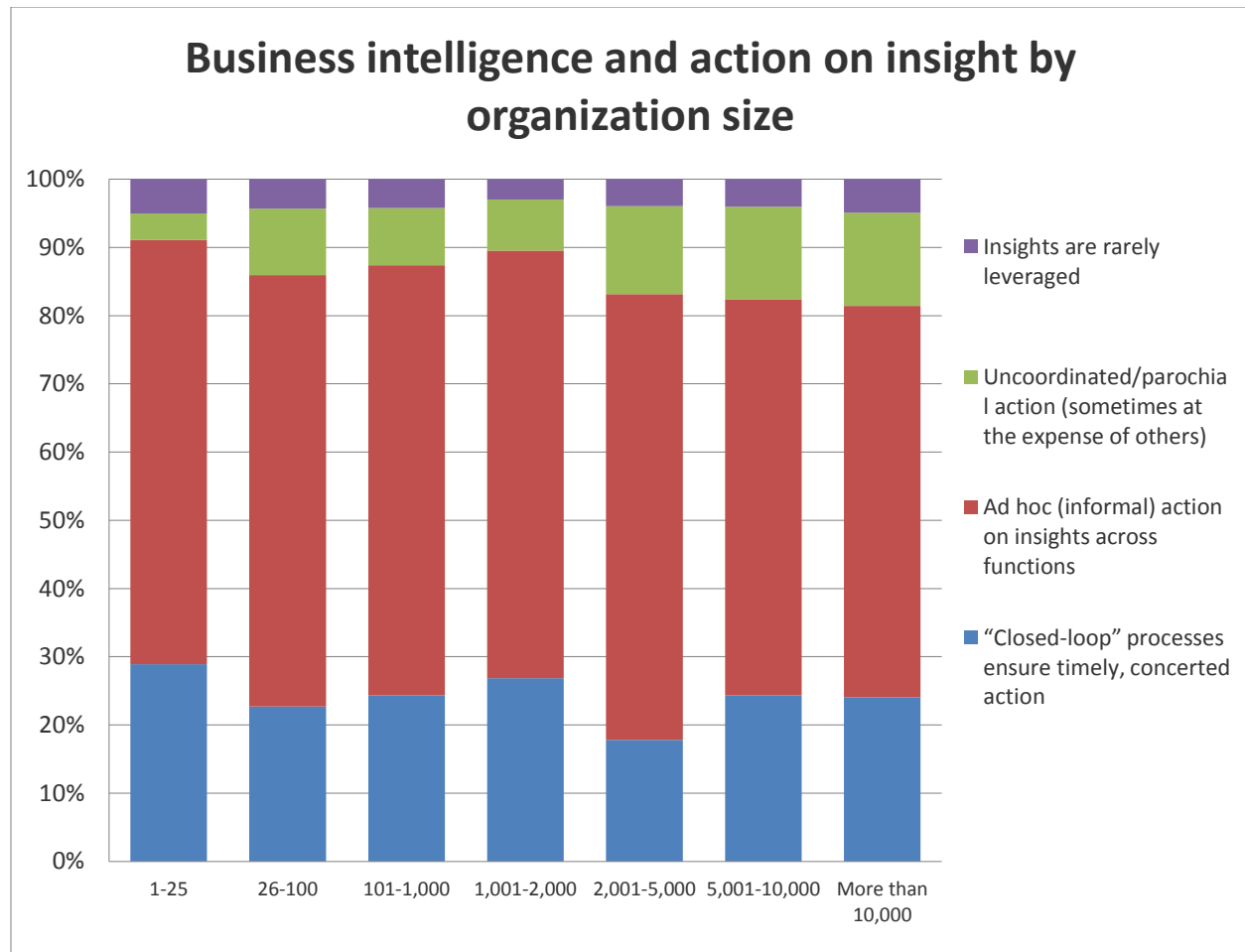
Figure 48. Business Intelligence and action on insight by organization size

Success with Business Intelligence

Though the state of data and action on insight are newly sampled this year, organizations have shown very consistent estimations of success with business intelligence over the last three-year time span (fig. 49). About half steadily "agree somewhat" and more than 40 percent "completely agree" that initiatives and programs have been successful. As our sample size has grown and we collected many more views, we see this as a stable estimation of perceived success.
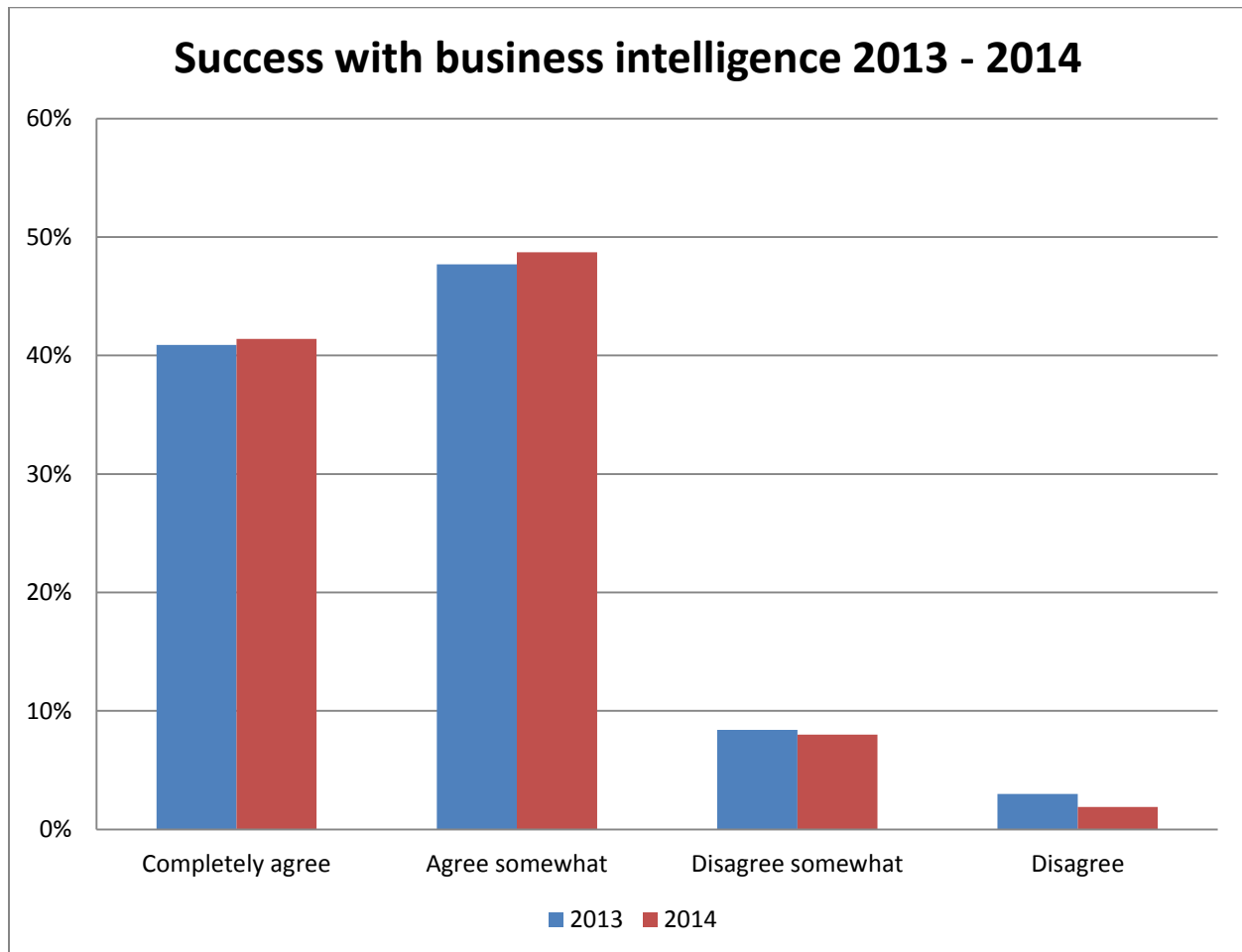
Figure 49. Success with business intelligence: 2013 - 2014

Reasons Why Business Intelligence Succeeds

Tag cloud analysis of success indicators flow from "data" and "information" through terms like "good," "tools," "reporting" "analysis," and "use" to the operative nouns "business," "business intelligence" and "successful" (fig. 50).

Primary reasons for success with BI include: senior management that view BI as strategic, a stable organization, focus on critical opportunities and the requisite skills to deliver solutions.

Figure 50. Reasons for success with business intelligence

Reasons Why Business Intelligence Fails

Asked for reasons why business intelligence fails, respondents point to shortfalls and constraints surrounding data that include "tools" and "time," but also "business," "organization" and "management" (fig. 51).

Primary reasons for failure include: a lack of management understanding or appreciation of BI, a predominant focus upon technology vs. solving business problems and a lack of skills and resources to deliver solutions.

Figure 51. Reasons why business intelligence fails

Success with Business Intelligence by Organization Size

The smallest organizations are most likely (> 60 percent) to consider themselves "completely successful" with business intelligence, which is twice the rate of some mid-sized organizations (fig. 52). As we've seen elsewhere in our survey data, reports of success tend to decline with organizational size until they rebound slightly with the very largest. Still, organizations with 2,001 or more employees are more likely to consider their efforts "somewhat unsuccessful" or "unsuccessful."
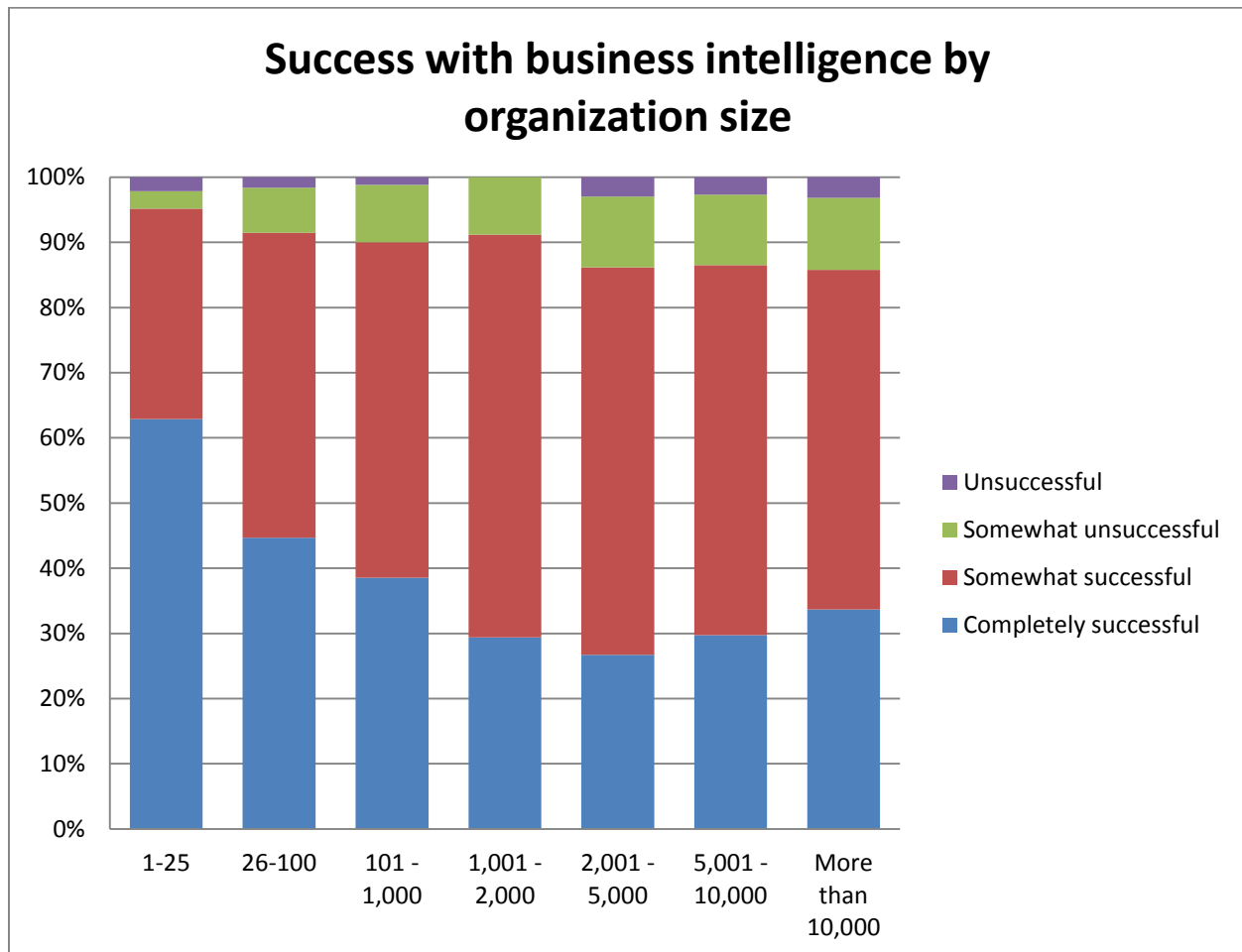
Figure 52. Success with business intelligence by organization size

Success with Business Intelligence by BI Objectives

Better decision making is the most–cited benefit to organizations regardless of their perceived success with BI initiatives (fig. 53). This reinforces a slightly more reflective focus on wins and losses than on hard benefits of revenue, cost, or market share. Organizations that consider themselves unsuccessful are somewhat less balanced across the range of BI objectives than successful ones.
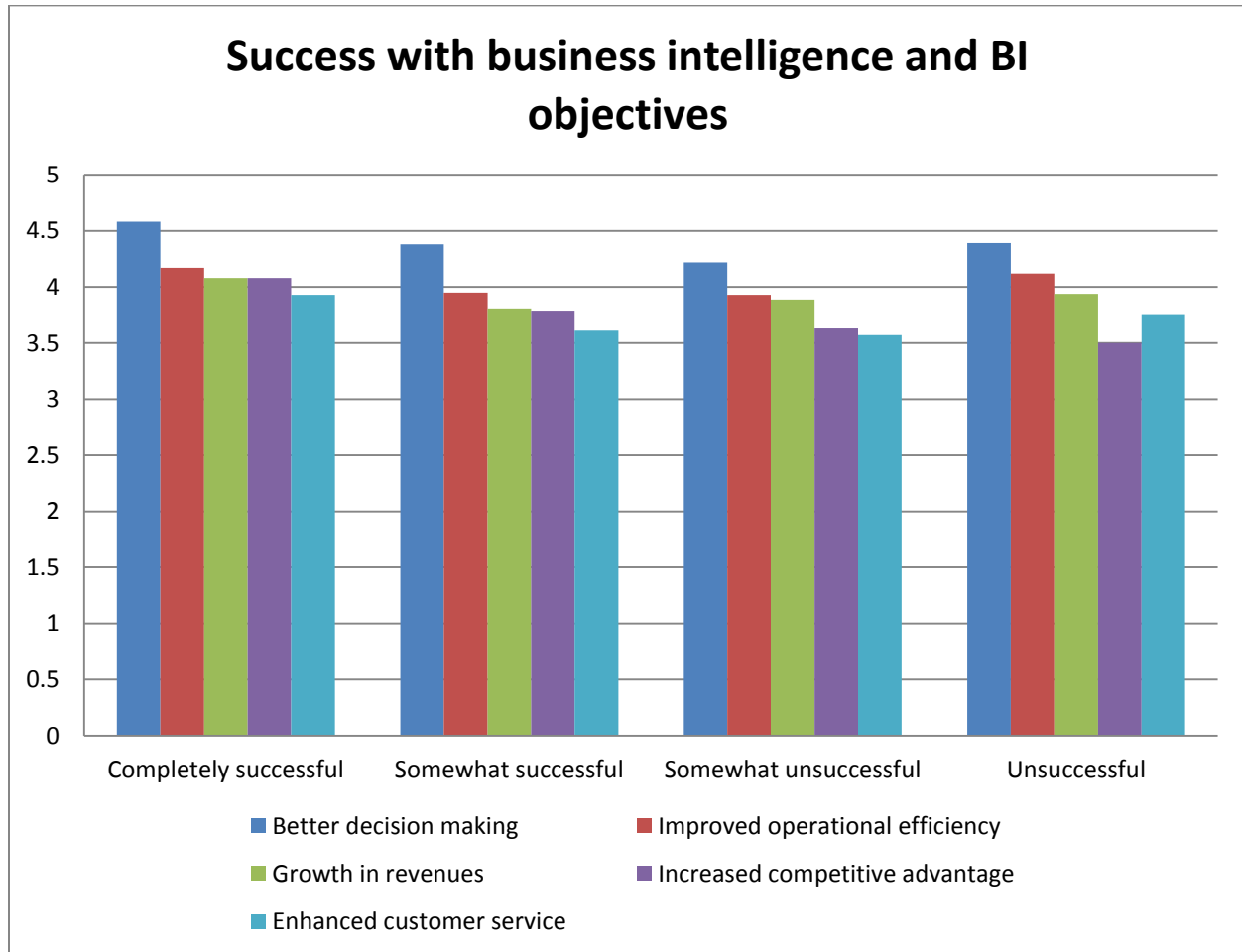
Figure 53. Success with business intelligence and BI objectives (weighted average)

Success with Business Intelligence by Targeted Users

Although cause and effect relationships are not clear, those that are successful with BI seem to focus more upon delivering capabilities to executive management as a top priority, followed by middle managers (fig. 54). In contrast, the least successful organizations focus first upon middle management. They also place greater importance on customers and less importance on line management than their more successful counterparts.
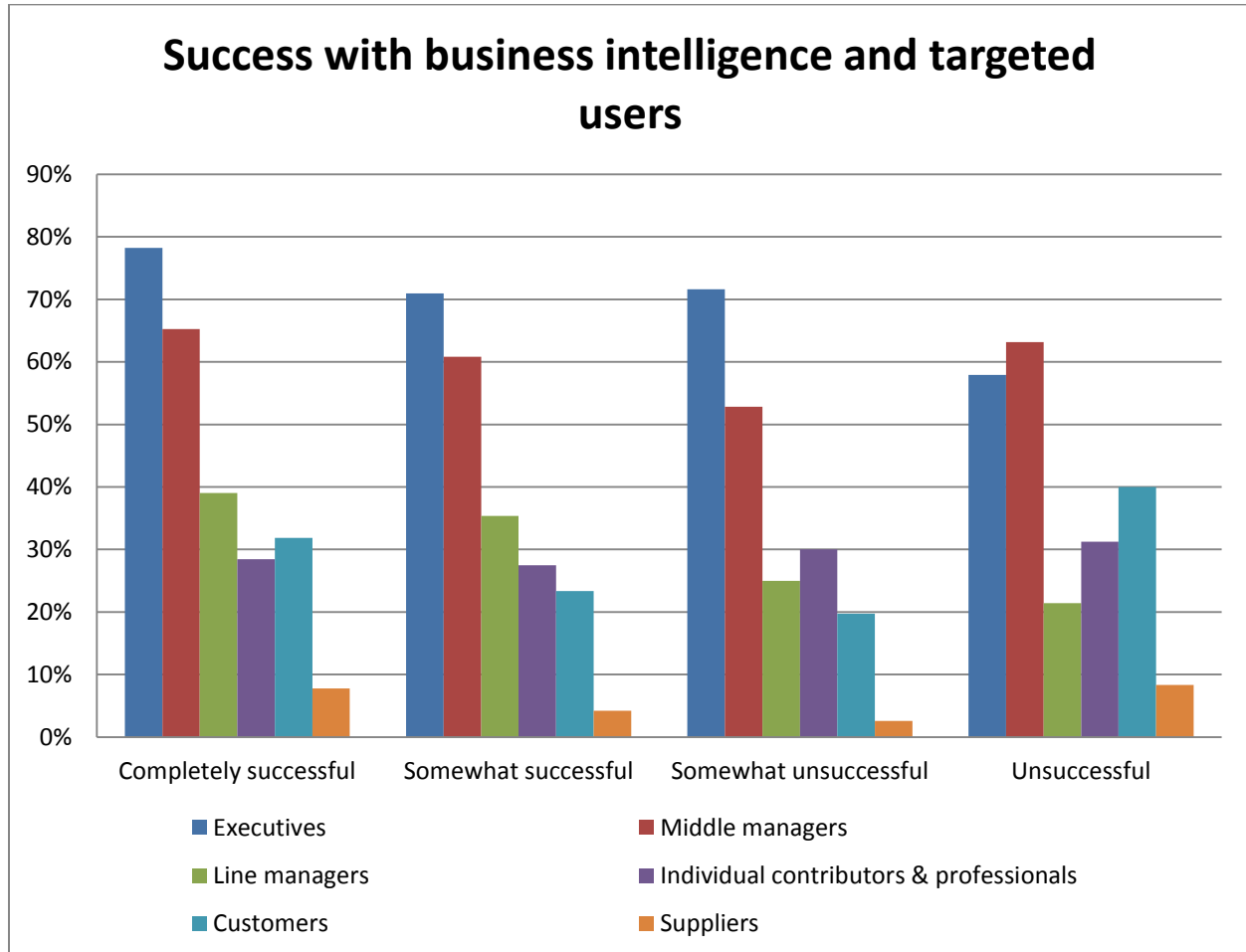
Figure 54. Success with business intelligence and targeted users

Success with Business Intelligence and Technology Priorities

With a few exceptions, reports of success with BI deviate little based on specific technology priorities (fig. 55). Those claiming success are slightly more likely to favor in-memory analysis and data mining and advanced algorithms. Those that are less successful were more likely to favor big data, analytical applications, software-as-a-service / cloud and location intelligence.
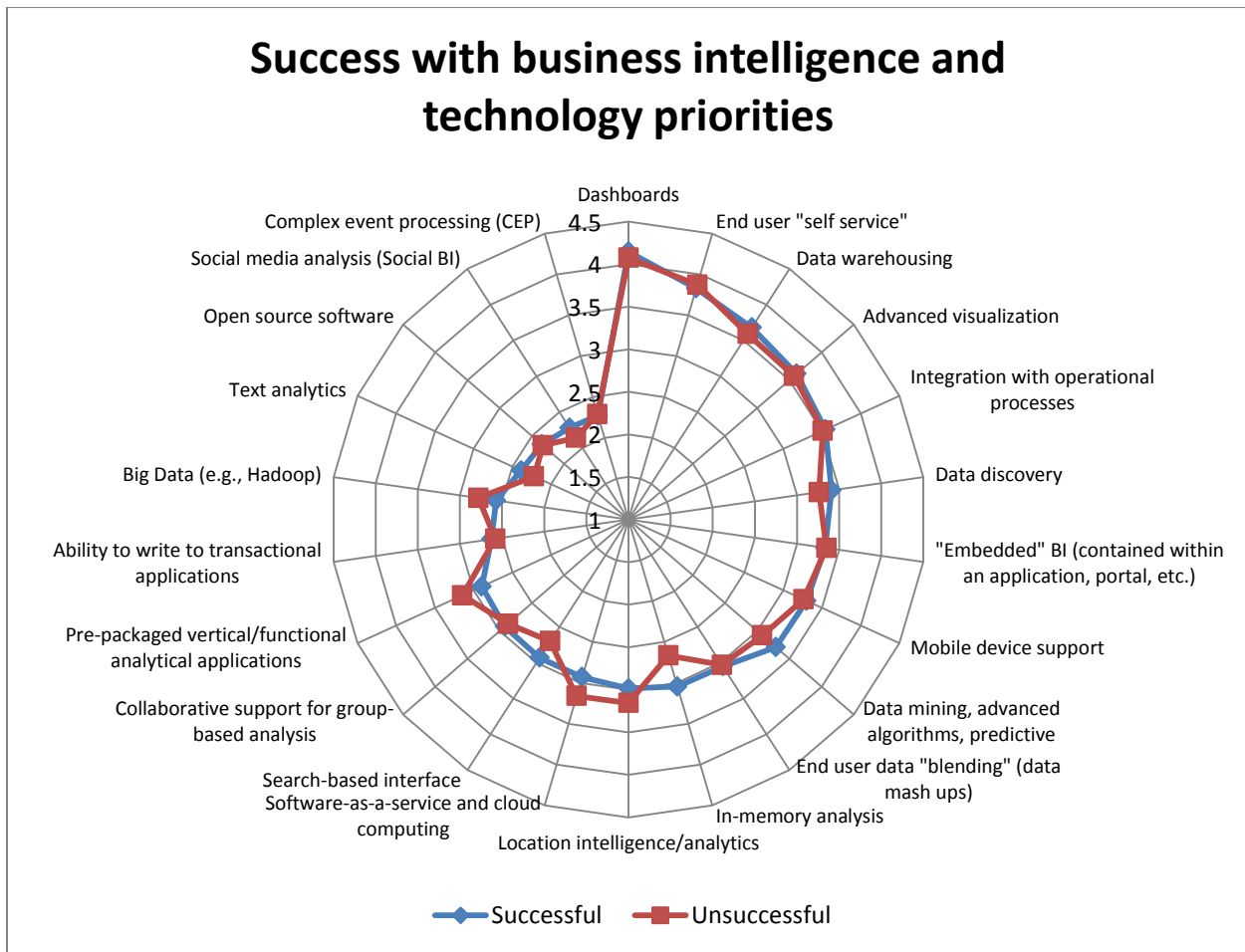
Figure 55. Success with business intelligence and technology priorities (weighted average)

Success with Business Intelligence and Numbers of BI Tools

The number of tools used in organizations bears on levels of perceived success with business intelligence, though not in linear fashion (fig. 56). About 80 percent of organizations that are completely successful use up to three BI tools, but so do less successful organizations. Awareness is part of the picture: the more respondents are unaware of the number of tools in use, the more likely they will report being unsuccessful. Organizations that use a large number of BI tools (e.g., seven or more) are slightly more likely to be unsuccessful than those using fewer.
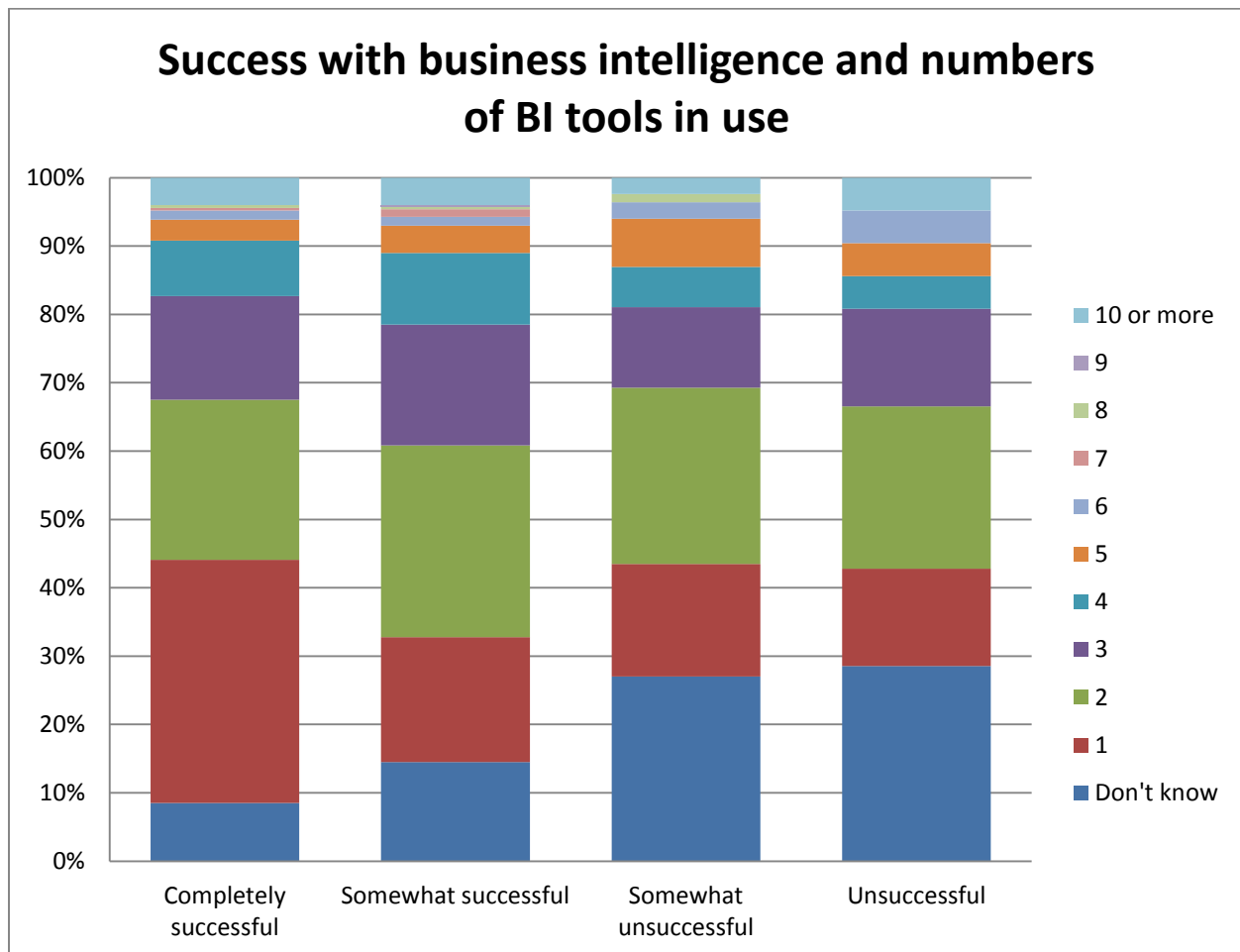
Figure 56. Success with business intelligence and numbers of BI tools in use

Success with Business Intelligence and the State of Data

Success with business intelligence relates strongly and directly to an organization's state of data (fig. 57). Respondents that say their organization views data as "truth" with common rules and semantics are completely successful at about 10 times the rate of those with multiple inconsistent sources. Even organizations with consistent data at departmental levels are somewhat or completely unsuccessful more than 60 percent of the time.
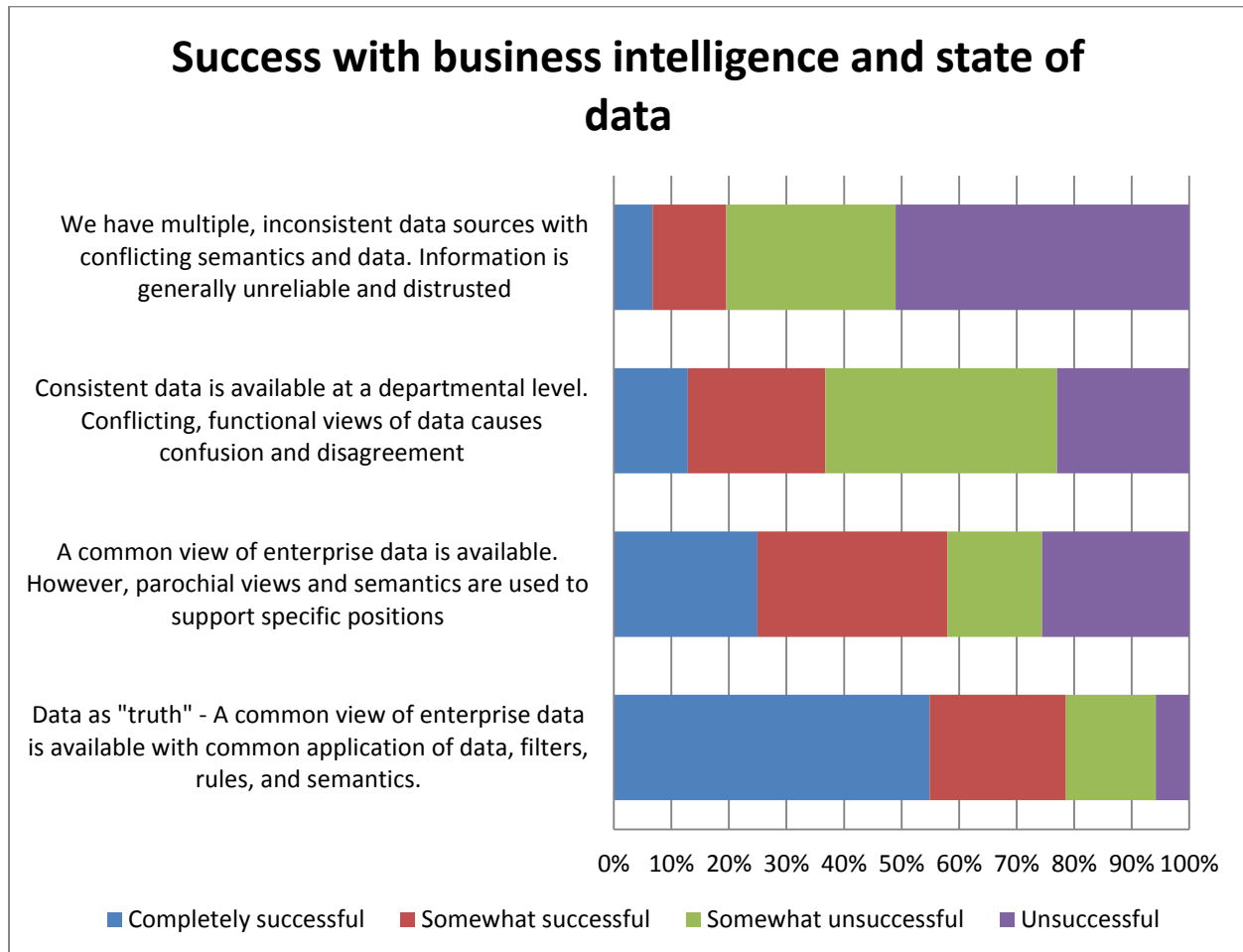
Figure 57. Success with business intelligence and state of data

Success with Business Intelligence and Action on Insight

Success with business intelligence corresponds strongly to an organization's ability to act on insight (fig. 58). At the high end of performance, organizations with "closed loop" processes are completely successful nearly 60 percent of the time and at least somewhat successful 85 percent of the time. Organizations with ad hoc or informal action on insight were only about half as successful; organizations with uncoordinated processes and unleveraged insights are much more likely to fail than to succeed.
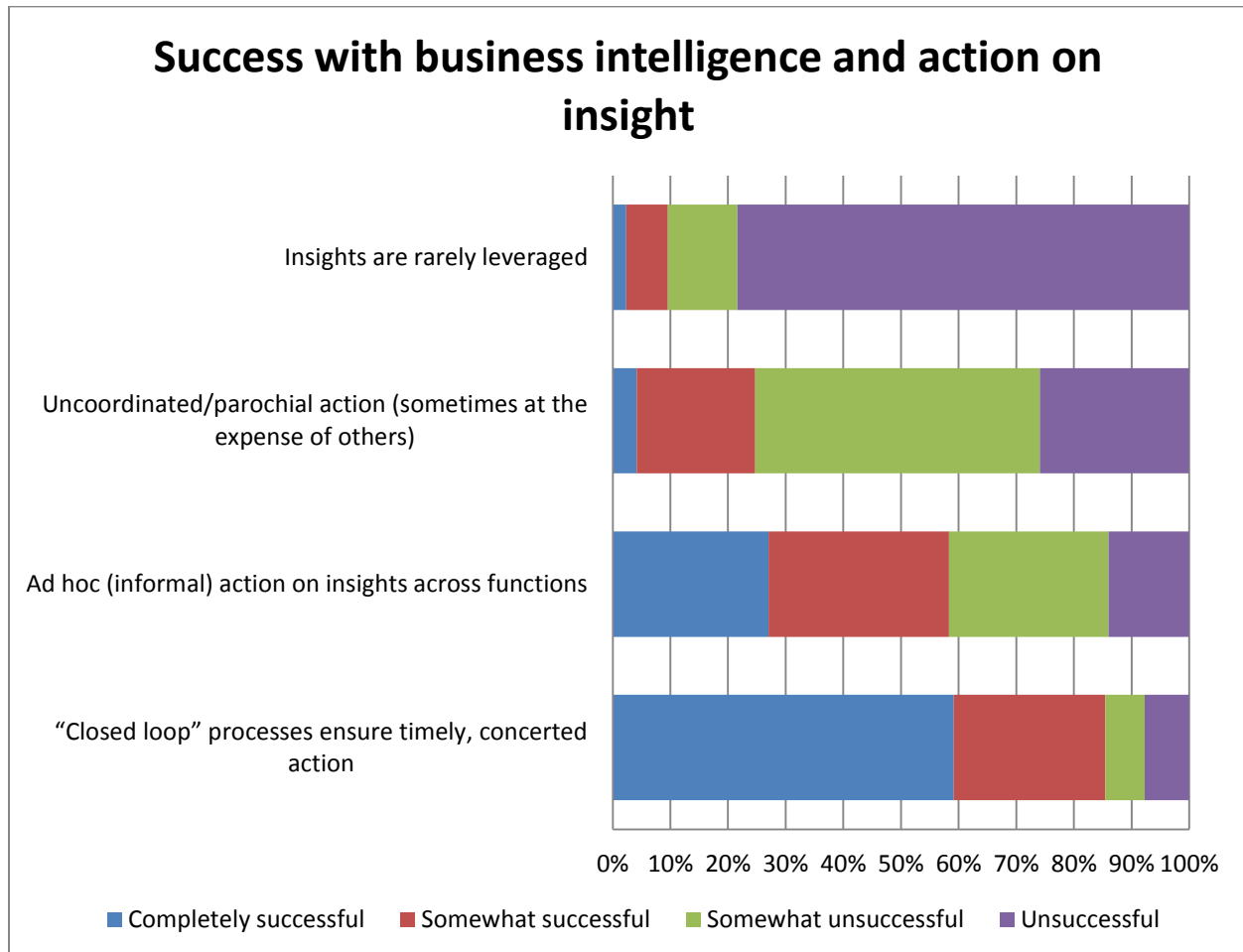
Figure 58. Success with business intelligence and action on insight

Success with Business Intelligence and Penetration of Users

Penetration of business intelligence correlates directly to the degree of success reported by respondents (fig. 59). Greater than 60 percent of somewhat successful and almost 70 percent of unsuccessful respondents report less than 10 percent BI penetration in their organizations. Conversely, organizations claiming success with business intelligence report far greater penetration – perhaps offering proof to the old adage that "success breeds success"
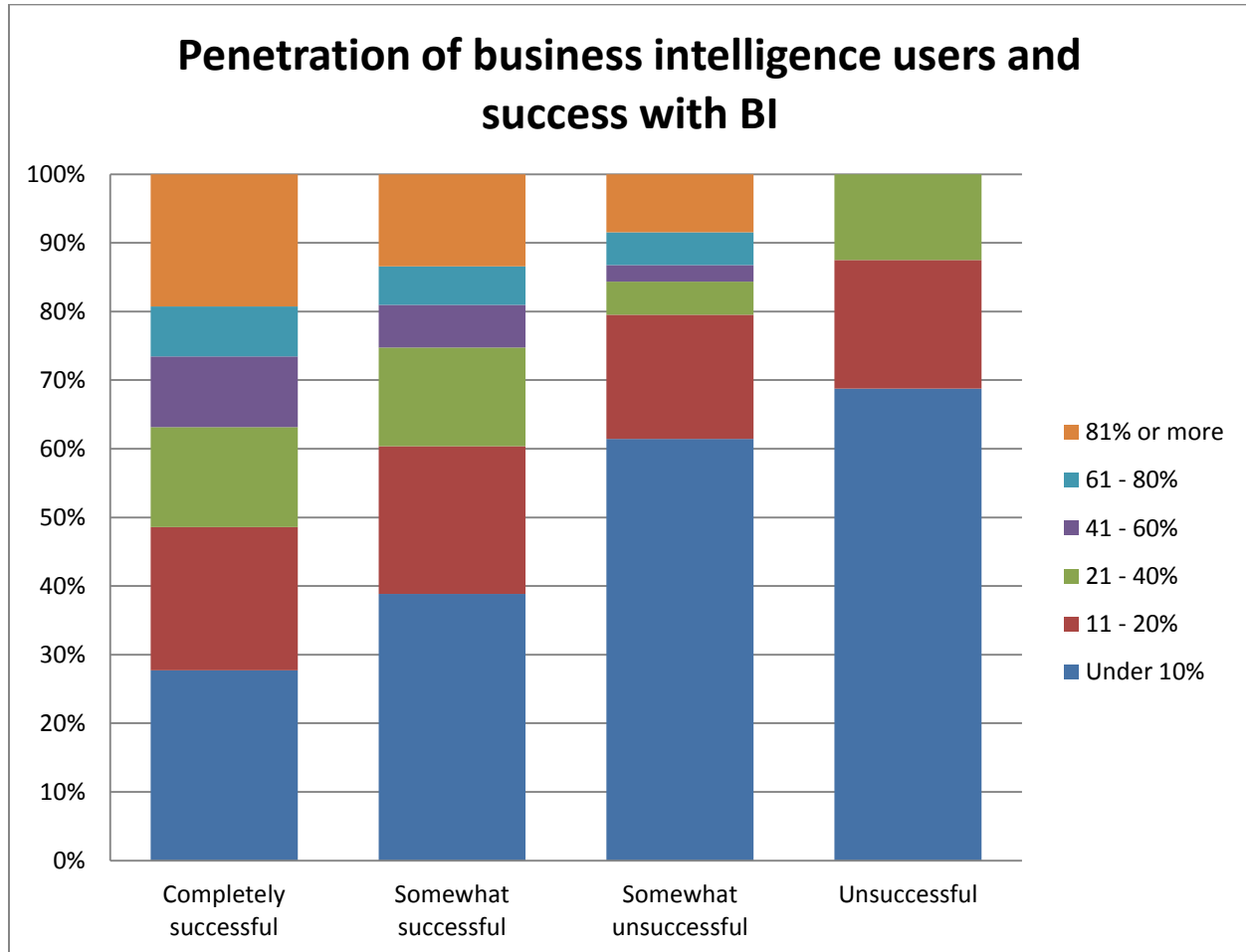
Figure 59. Penetration of business intelligence users and success with BI

Industry and Vendor Analysis

Industry and Vendor Analysis

In this section we review business intelligence vendor and market performance, using our trademark 33-criteria evaluation model.

Scoring Criteria

The criteria for the various industry and vendor rankings are grouped into seven categories including sales/acquisition experience, value for price paid, quality and usefulness of product, quality of technical support, quality and value of consulting, integrity, and whether the vendor is recommended.

Industry Performance

Sales/Acquisition Experience

Following a turndown in 2012, industry scores for "sales/acquisition experience" have rebounded for the past two years. Every customer category measured is now at an all-time high, near or above a rating of "very good" (fig. 60). Professionalism and product knowledge lead the way in industry evaluations; contractual terms and follow-up after the sale lag. The industry performs less well (by comparison) in understanding business needs and flexibility/accommodation in what is stressful and in data-driven competitive environment for customers.
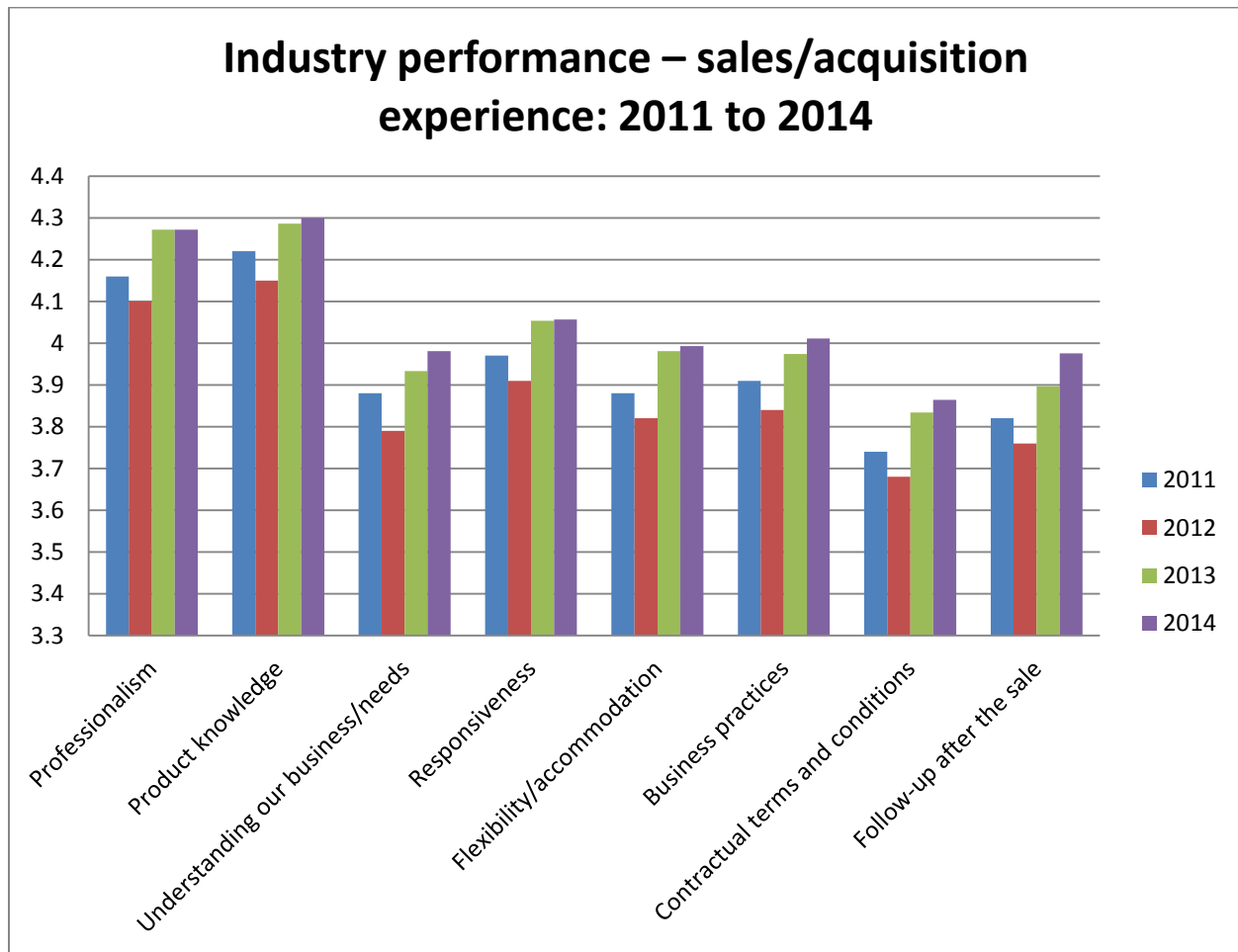
Figure 60. Industry performance—sales/acquisition experience: 2011 to 2014 (weighted average)

Value

Customer ratings of industry value dipped in 2014, but only by less than one-half of one percent compared to 2013 (fig. 61). Net value as an average held a positive trend for the last four years, and the current average of greater than 4.02 puts value slightly above the threshold of "very good."
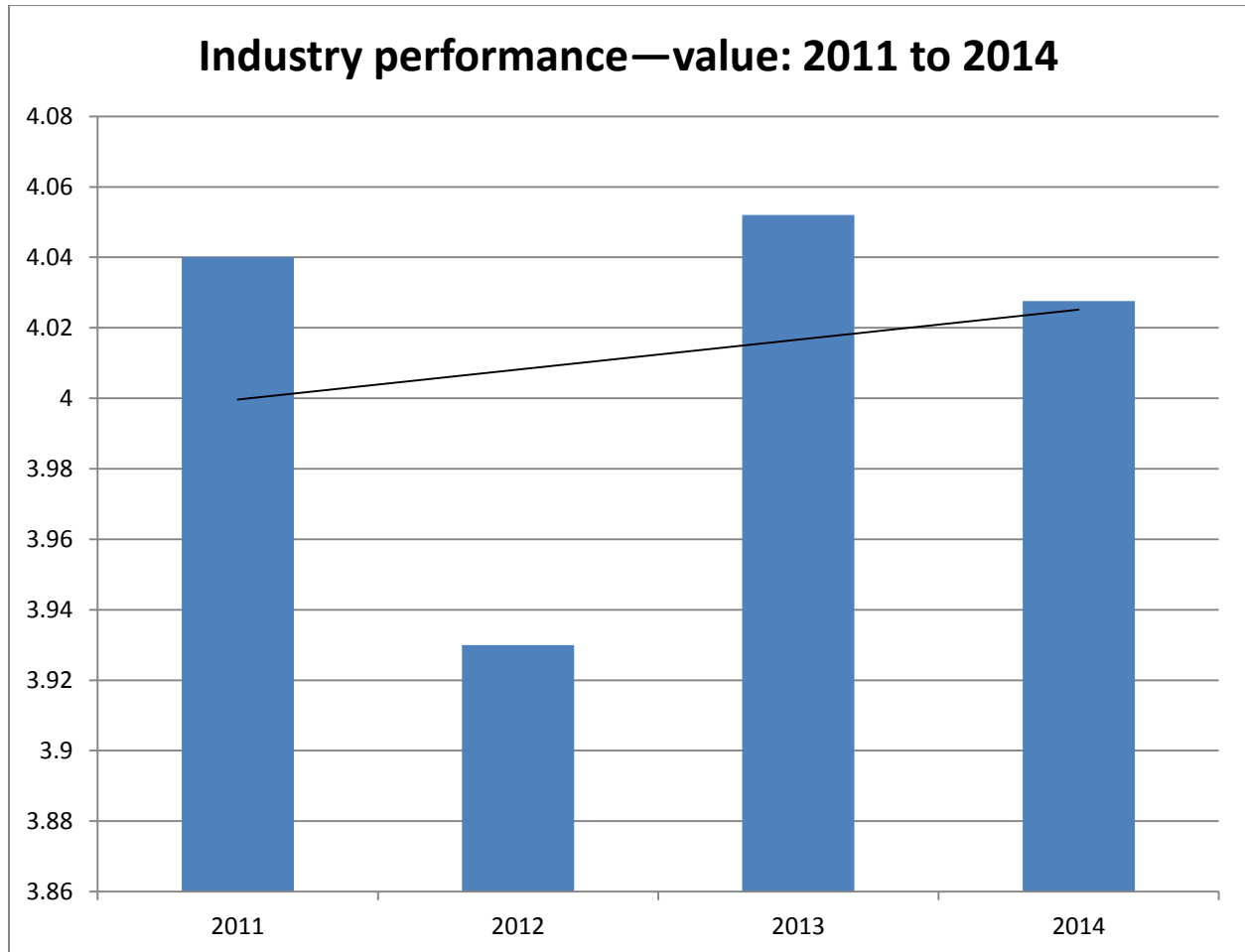
Figure 61. Industry performance—value: 2011 to 2014 (weighted average)

Quality and Usefulness of Product

In 2014 industry performance improved in areas of ease of installation and administration, customization and extensibility, and ease of upgrade (fig. 62). Customers were slightly less happy in areas of robustness/sophistication, completeness of functionality, reliability, scalability, and component integration, which may reflect experience and rising expectations. Integration with third-party technologies, a relatively sore spot with customers in past years, fared worse again in 2014 along with online training, forums, and documentation.
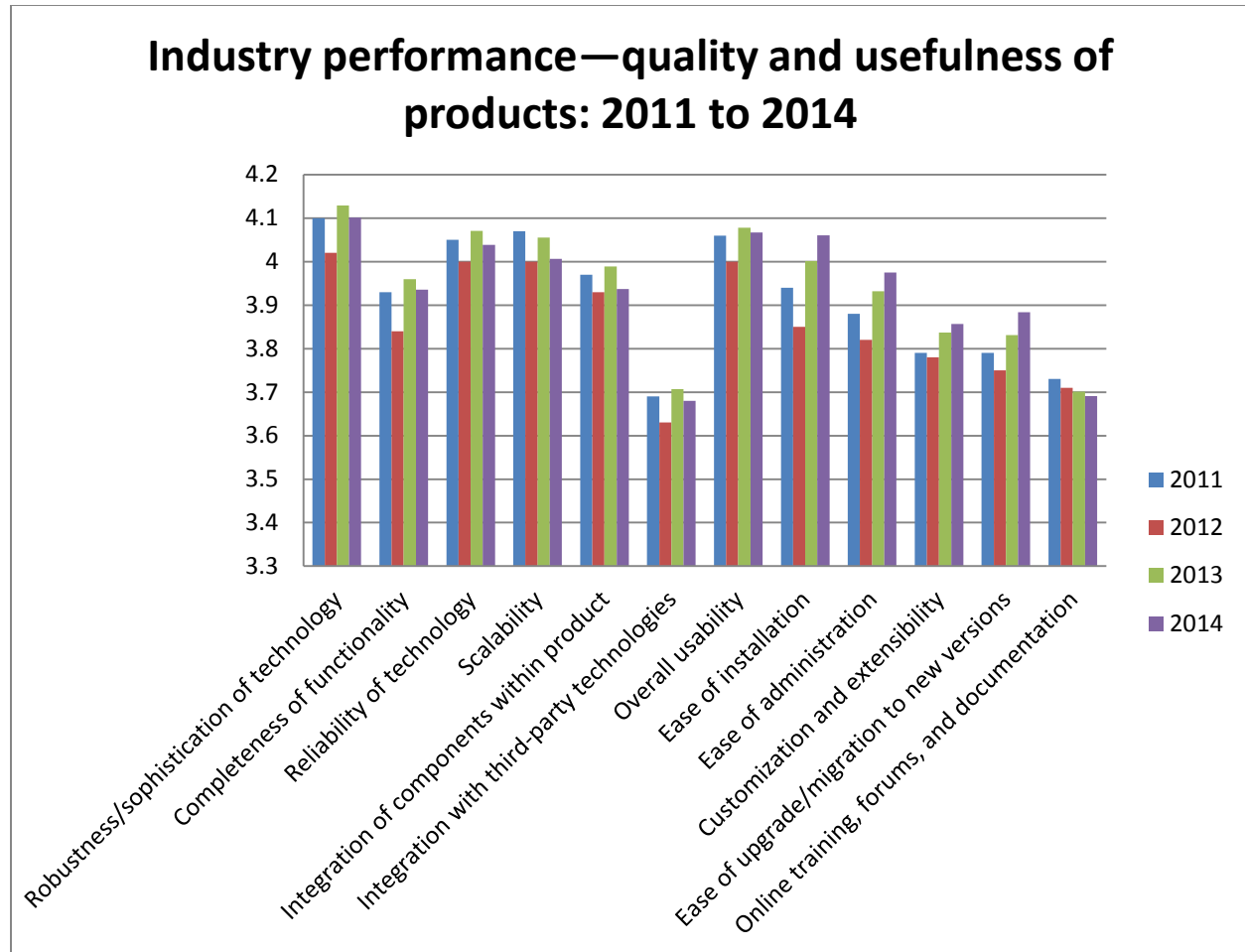
Figure 62. Industry performance—quality and usefulness of products: 2011 to 2014 (weighted average)

Technical Support

In 2014, industry technical support largely held its ground over the previous years with no appreciable gains (fig. 63). Responsiveness scored a slightly higher score in 2014 while other categories were close to flat year over year. That said, average scores were above the threshold of "very good" in all categories except time to resolve problems.
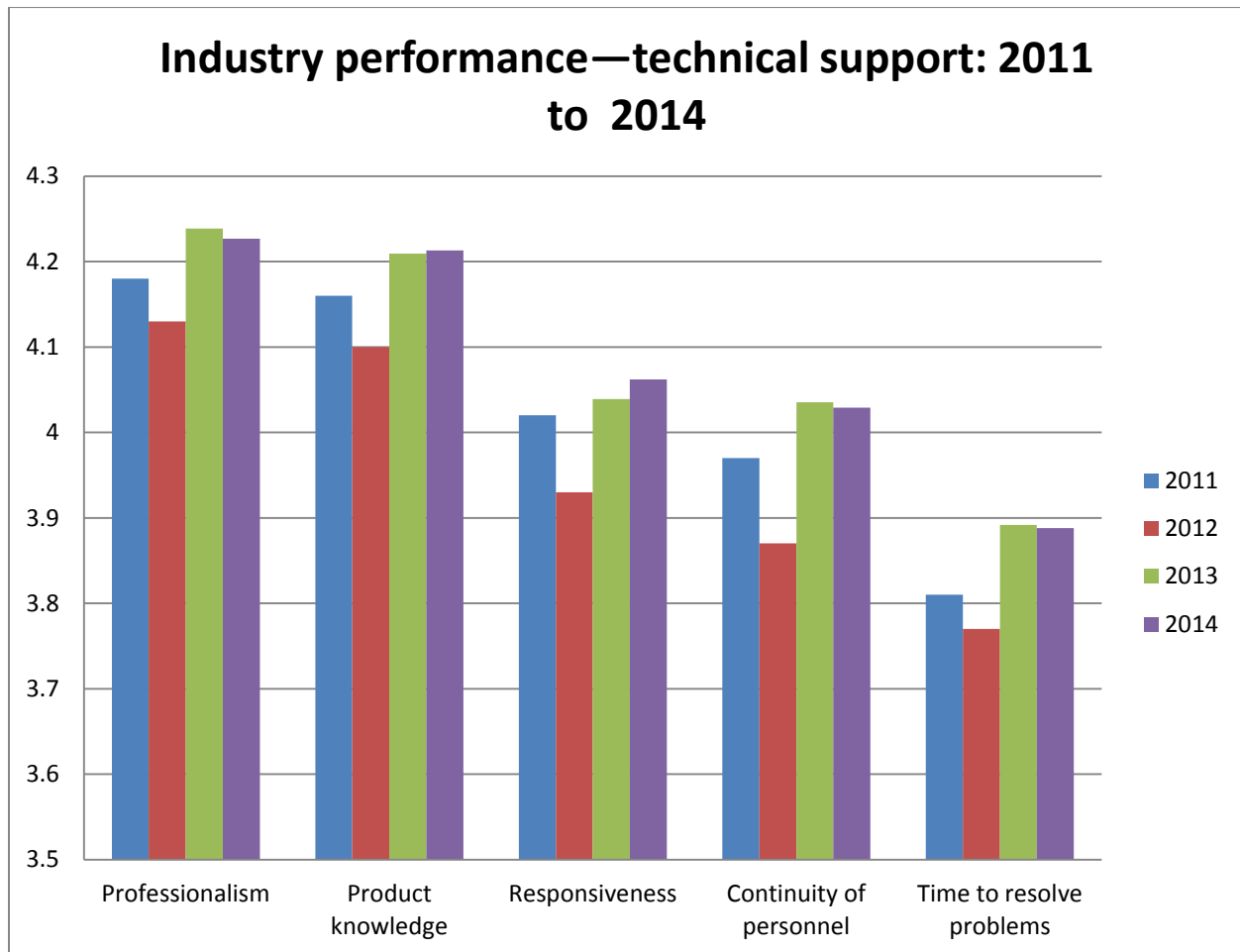
Figure 63. Industry performance—technical support: 2011 to 2014 (weighted average)

Consulting

BI vendor consulting is a bright spot in 2014 and reflects steady year-over-year industry performance gains (fig. 64). All five measures reached all-time highs, led by product knowledge, professionalism, and experience. BI consulting continuity, a traditional sore spot for customers, also scored above average. Value, the weakest measure, has been improving for the past four years.
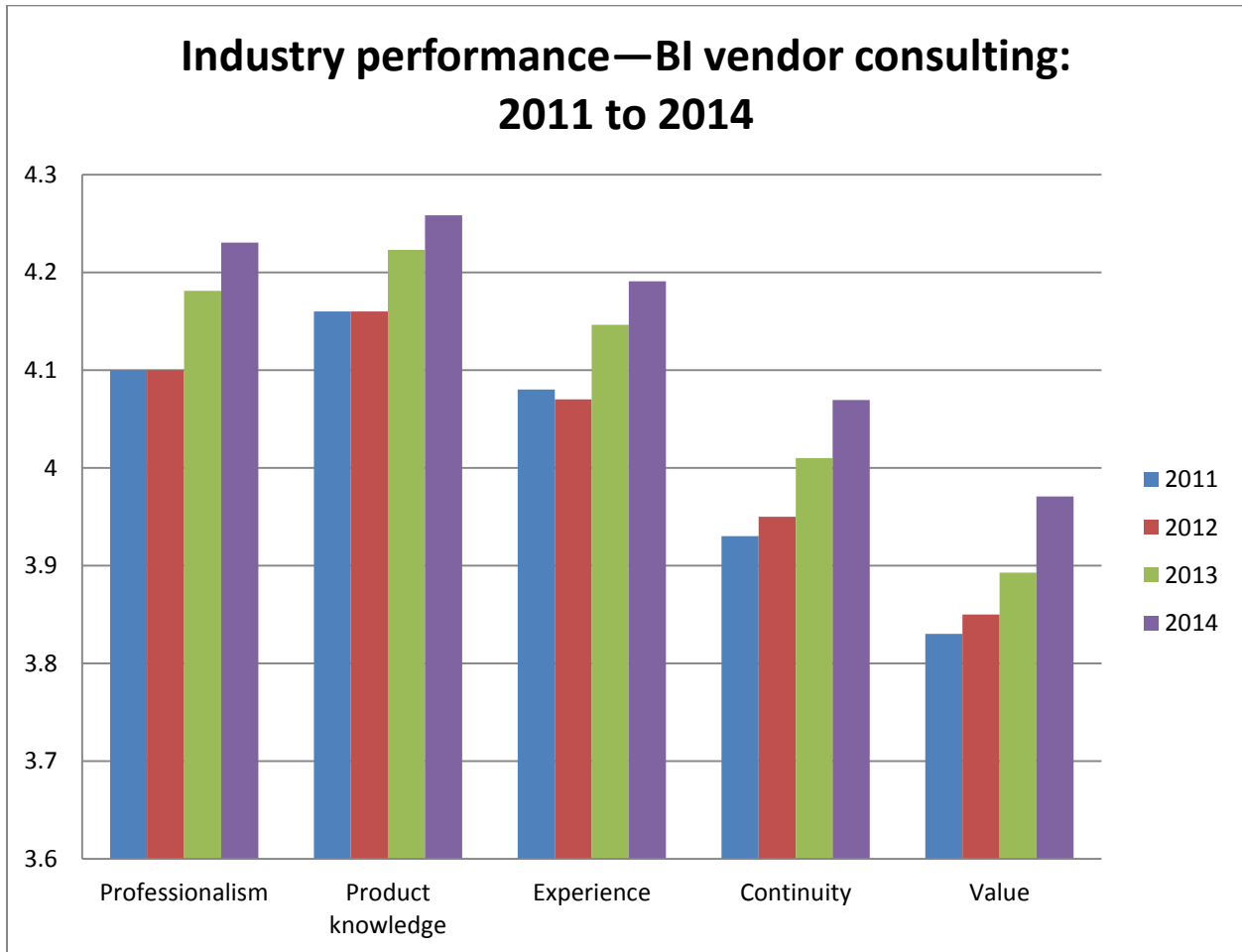
Figure 64. Industry performance—BI vendor consulting: 2011 to 2014 (weighted average)

Integrity

Vendor integrity—measured as honesty and truthfulness in all dealings—declined slightly compared to 2013 (fig. 65) but remains well above 2012 levels. Despite the modest decline, the average respondent rates industry integrity higher than the "very good" threshold.
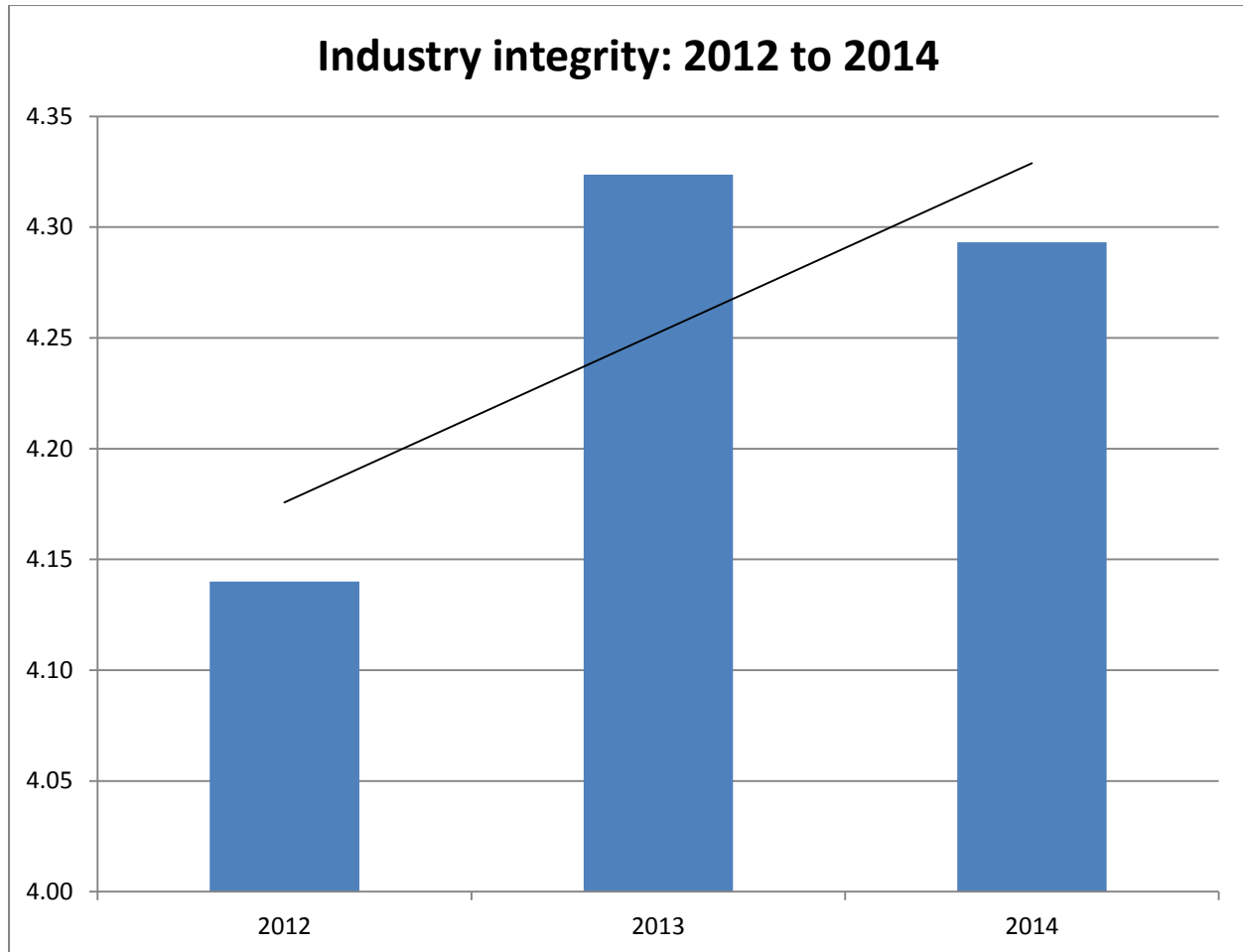
Figure 65. Industry integrity: 2012 to 2014 (weighted average)

Recommended

In 2014, respondents are slightly less likely to recommend their BI software provider than in 2013 (fig. 66). 2014 also represents a 4.5 percent reduction in likely vendor recommendations compared to 2011. While this may not reflect a decline in vendor loyalty among users, it may suggest greater experience and exposure to new and alternative BI providers.
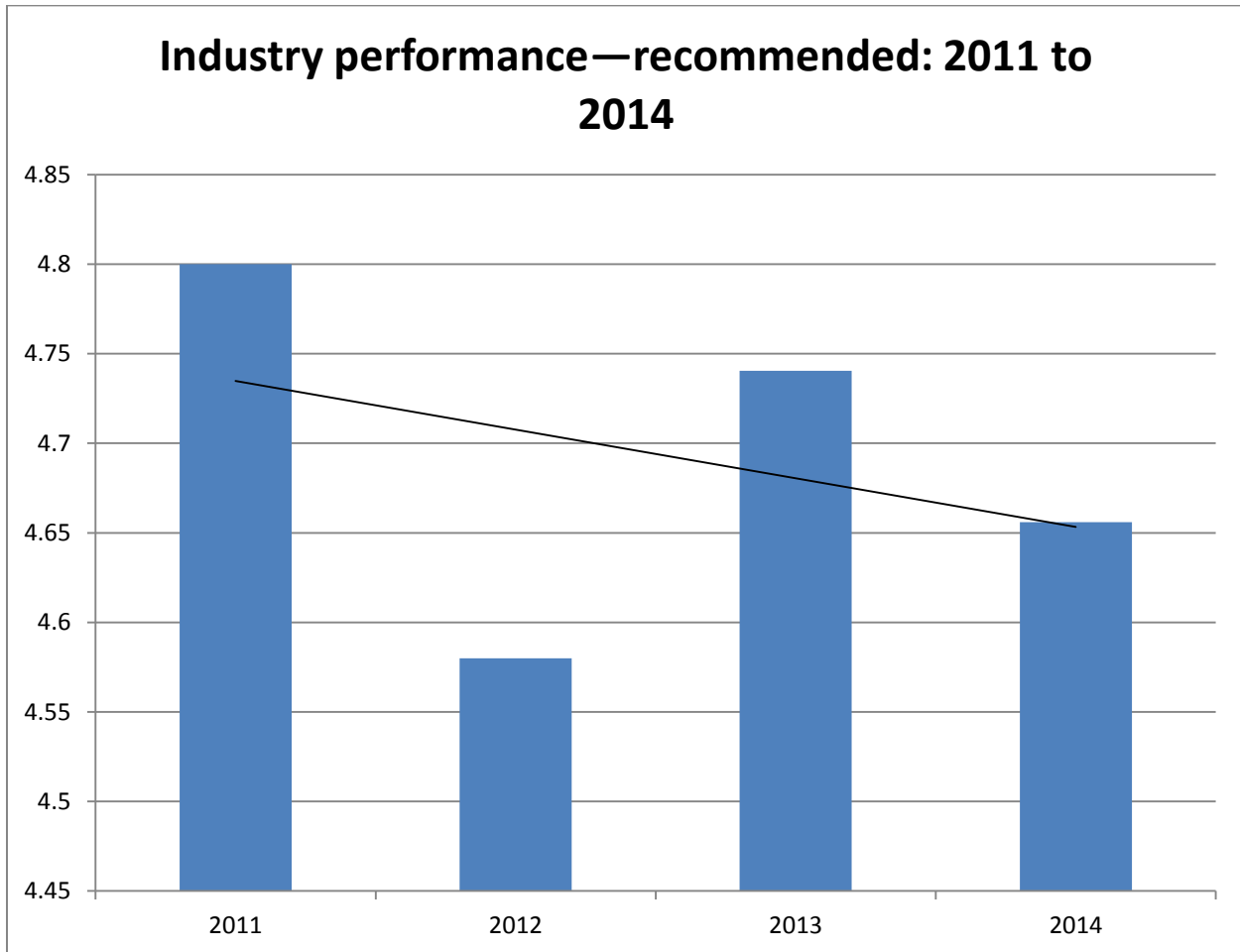
Figure 66. Industry performance—recommended: 2011 to 2014 (weighted average)

Performance Improvements

In a question new for 2014, more than half of respondents say overall industry performance is about the same compared to last year (fig. 67). That said, nearly 40 percent say they did see an improvement in overall industry performance and less than five percent report a decline.

Overall performance improvement
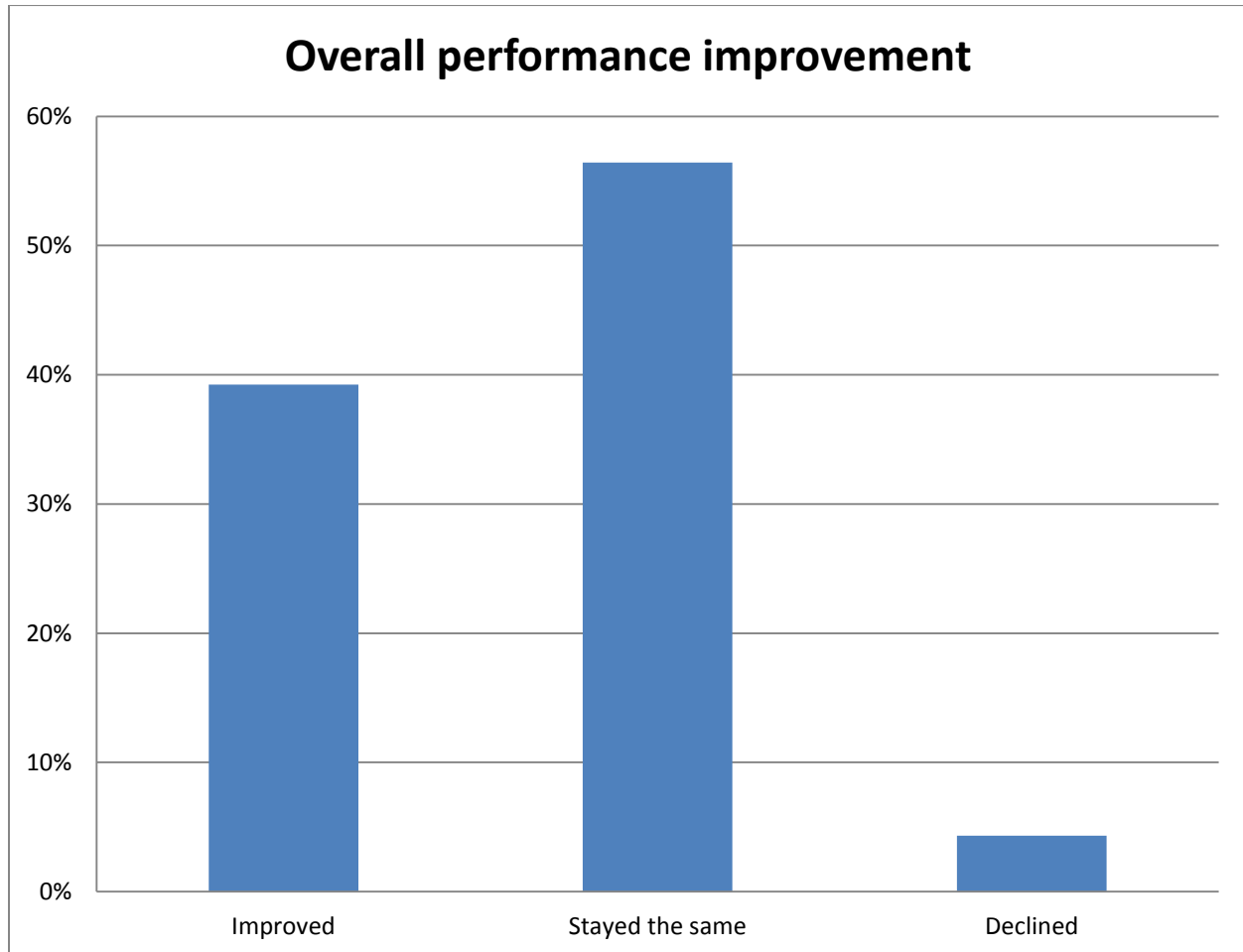
Figure 67. Overall performance improvement

Vendor Rankings

Vendor Stacked Rankings

In this section we offer stacked rankings of business intelligence software vendors. We ranked vendors using 33 different criteria, on a five-point scale for each. Criteria covered sales /acquisition experience (8 criteria), value for price paid (1), quality and usefulness of product (12), quality of technical support (5), quality and value of consulting services (5), whether the vendor is recommended (1), and integrity (1). The result is a stacked ranking with an average score for all seven categories and an overall average score for each vendor.

As we explore vendor performance in more detail, it's important to understand the scale that we used in scoring the industry and vendors:

- 5.0 = Excellent
- 4.0 = Very good
- 3.0 = Adequate
- 2.0 = Poor
- 1.0 = Very poor

Market segments include "Titans," "Established Pure-Play," "Emerging," "High-Growth," "Specialized," and "Early Stage."

Within each segment, vendors have similar traits and, as a result, similar score-average ranges. So, while comparisons can (and no doubt will) be made between these sub-segment "peer groups," it's not always a reasonable comparison.

Based on our scoring methodology, all vendors performed at a level that is considered more than "adequate" for all criteria categories.

Please note that "Average score" is the mathematical mean of all items included in vendor ratings. Each column in the chart represents a scale consisting of varying numbers of items (for example, "sales" is a scale consisting of eight items, while "value" for price is one item). As such, each column is weighted differently (based upon the number of items represented and the number of respondents rating those items) in calculating the overall Average rating. The Average Score cannot be calculated by simply averaging across the subscale scores.

Business Intelligence Titans

"Titans" (table 1) are the largest vendors with extensive product and service offerings—including business intelligence. In all cases these vendors have acquired business intelligence vendors. Included in this category are Infor, Microsoft, IBM, Oracle, and SAP.

Table 1. Business Intelligence Titans—stacked rankings

Vendor	Sales	Value	Product	Support	Consult	Integrity	Recommend	Overall
Infor	3.70	3.72	3.69	3.83	4.06	4.14	4.59	3.96
Microsoft	3.46	3.74	3.66	3.39	3.67	3.75	4.36	3.72
IBM	3.43	3.34	3.44	3.34	3.62	3.76	4.05	3.57
Oracle	3.34	3.15	3.32	3.38	3.56	3.71	3.96	3.49
SAP	3.13	3.03	3.15	3.07	3.07	3.25	3.82	3.22

Large Established Pure-Play Business Intelligence Vendors

"Large Established Pure-Play" vendors (table 2) focus primarily upon business intelligence software and services, have typically been in business for 15 + years, and have well-established customer bases and revenue streams. Several are publicly held. These include Information Builders, Actuate, Qlik, MicroStrategy, and SAS.

Table 2. Business Intelligence Established Pure-Plays—stacked rankings

Vendor	Sales	Value	Product	Support	Consult	Integrity	Recommend	Overall
Information Builders	4.52	4.21	4.25	4.48	4.41	4.62	4.90	4.49
Qlik	3.86	4.03	4.14	4.00	4.16	4.03	4.89	4.16
Actuate	3.72	3.82	3.71	4.10	3.95	4.17	4.67	4.02
MicroStrategy	3.86	3.71	3.99	3.86	3.85	4.12	4.50	3.99
SAS	3.76	3.43	3.66	3.97	4.00	3.95	4.24	3.86

High-Growth Business Intelligence Vendors

"High-Growth" vendors (table 3) are those that have achieved critical mass in the market and are growing at an extremely high rate, well above the industry average. This category includes Tableau, TIBCO, Logi Analytics, and Pentaho.

Table 3. High-Growth Business Intelligence Vendors—stacked rankings

Vendor	Sales	Value	Product	Support	Consult	Integrity	Recommend	Overall
Tableau	4.13	4.36	4.38	4.14	4.28	4.42	4.85	4.37
TIBCO	4.18	4.36	4.06	4.22	4.25	4.42	5.00	4.36
Logi Analytics	4.16	4.11	4.09	4.26	4.10	4.45	5.00	4.31
Pentaho	3.95	4.18	3.65	4.02	4.04	4.19	4.90	4.13

Specialized Business Intelligence Vendors

"Specialized" business intelligence vendors (table 4) have been in existence for a number of years, have successfully focused on a particular sub-segment of the market (e.g., vertical industry), and are modest in size. Included in this category are Dimensional Insight, Dundas, Phocas, Targit, and Jinfonet.

Table 4. Business Intelligence Specialized Vendors—stacked rankings

Vendor	Sales	Value	Product	Support	Consult	Integrity	Recommend	Overall
Dimensional Insight	4.50	4.54	4.34	4.59	4.68	4.82	5.00	4.64
Dundas	4.38	4.41	4.27	4.56	4.56	4.73	5.00	4.55
Phocas	4.19	4.16	4.03	4.12	4.33	4.58	4.94	4.34
Targit	4.05	4.00	3.96	4.33	4.25	4.38	4.70	4.24
JInfonet	3.92	3.90	3.65	3.78	3.94	4.09	4.86	4.02

Emerging Business Intelligence Vendors

"Emerging" vendors (table 5) are typically younger than the other categories and offer unique and often innovative business models, technologies, and/or services. This category includes Birst, Jaspersoft, Adaptive Insights, Jedox, and GoodData.

Table 5. Business Intelligence Emerging Vendors—stacked rankings

Vendor	Sales	Value	Product	Support	Consult	Integrity	Recommend	Overall
Birst	4.59	4.43	4.32	4.55	4.28	4.62	5.00	4.54
Jaspersoft	4.34	4.28	4.19	4.37	4.47	4.58	4.95	4.45
Adaptive Insights	4.43	4.26	4.16	4.41	4.35	4.50	5.00	4.45
Jedox	4.31	4.40	4.10	4.25	4.37	4.40	4.81	4.38
GoodData	3.84	3.86	3.77	4.52	3.93	4.33	4.53	4.11

After you have reviewed the stacked rankings of vendors, carefully examine the detailed, vendor-specific rankings for a more complete perspective and deeper understanding of individual vendors' strengths and weaknesses.

Detailed Vendor Scores

In this section, we offer detailed vendor scores. Using our 33-criteria evaluation model (table 6), we compare each vendor's performance to their direct peer group and to the average for all vendors (all records in the study population).

The detailed criteria are below. We added "clock" position information to assist in locating specific scores.

Table 6. Detailed vendor rating criteria

- **Sales/acquisition experience** *(12 - 2 o'clock)*
  o Professionalism
  o Product knowledge
  o Understanding our business/needs
  o Responsiveness
  o Flexibility/accommodation
  o Business practices
  o Contractual terms and conditions
  o Follow-up after the sale

- **Value for price** *(3 o'clock)*

- **Quality and usefulness of product** *(3 - 7 o'clock)*
  o Robustness/sophistication of technology
  o Completeness of functionality
  o Reliability of technology
  o Scalability
  o Integration of components within product
  o Integration with third-party technologies
  o Overall usability
  o Ease of installation
  o Ease of administration

- **Quality and usefulness of product (continued)**
  o Customization and extensibility
  o Ease of upgrade/migration to new versions
  o Online forums and documentation

-

- **Quality of technical support** *(8 - 9 o'clock)*
  o Professionalism
  o Product knowledge
  o Responsiveness
  o Continuity of personnel
  o Time to resolve problems

- **Quality and value of consulting services** *(9 - 10 o'clock)*
  o Professionalism
  o Product knowledge
  o Experience
  o Continuity
  o Value

- **Integrity** *(11 o'clock)*

- **Whether vendor is recommended** *(12 o'clock)*

Actuate Detailed Score

Figure 68. Actuate detailed score

A member of the "Large Established Pure-Play" category, Actuate is generally in line with peer and overall scores for many measures with the exception of several key product and sales values, which are below both averages. Its recommended score increased compared to 2013.

Adaptive Insights Detailed Score
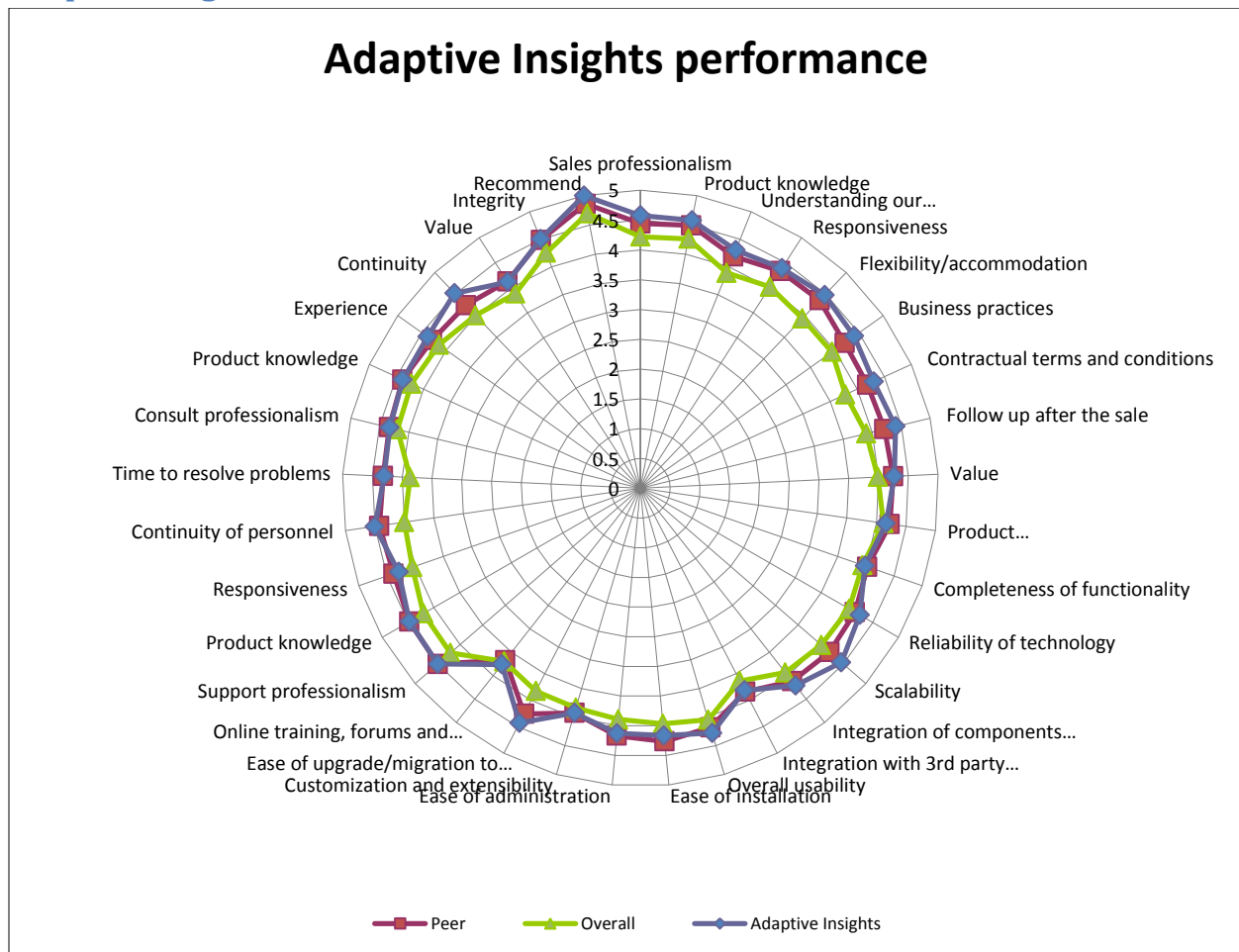
Figure 69. Adaptive insight detailed score

A new entrant in the Emerging market segment for 2014, Adaptive Insights is generally in line with or above peer averages. It is above overall averages and has a perfect recommended score.

Birst Detailed Score
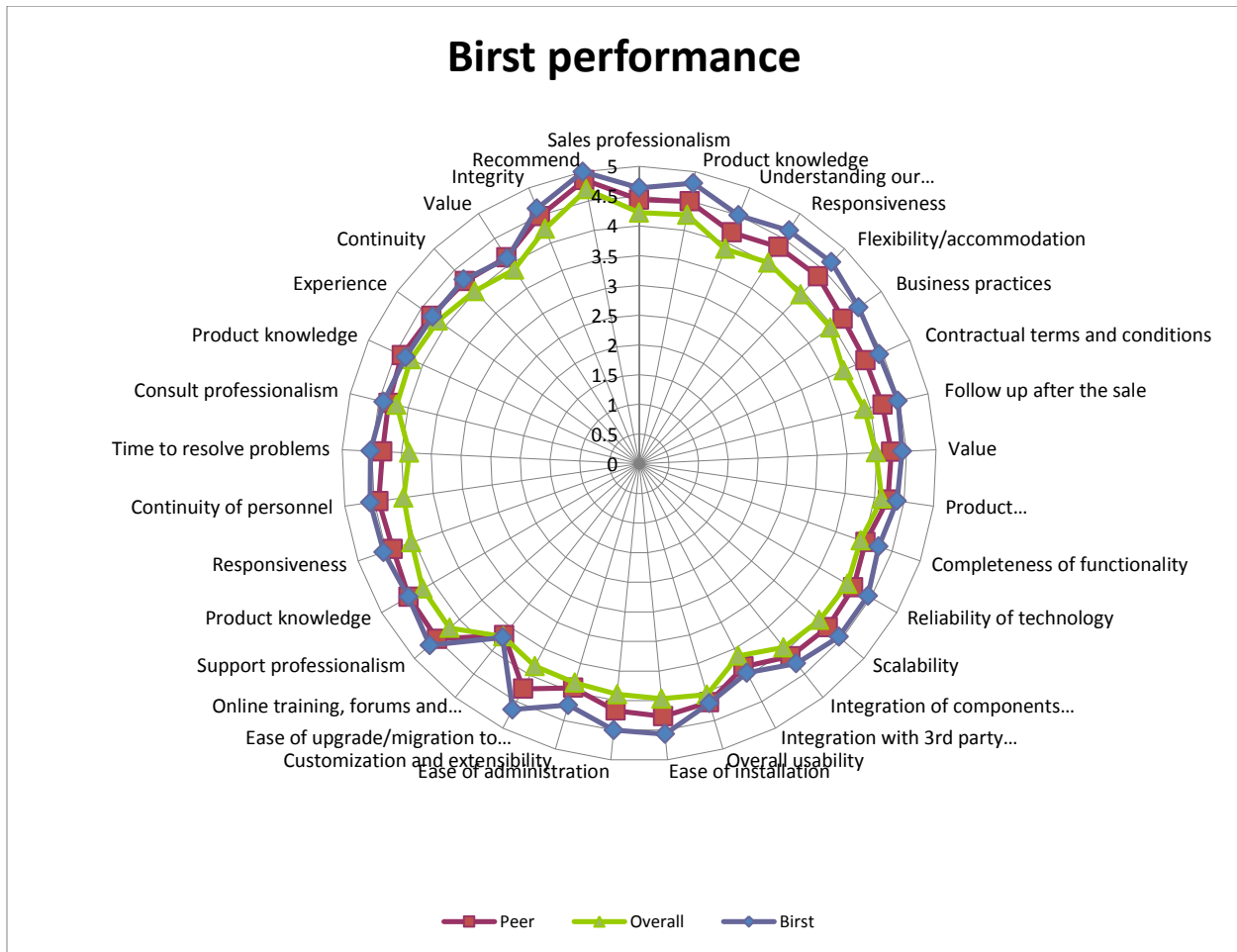
Figure 70. Birst detailed score

Birst, a member of the Emerging market segment, is its top-ranked vendor for 2014. Its scores are generally above peer and overall averages. It increased performance for virtually all measures compared to 2013 including a perfect recommended score.

Dimensional Insight Detailed Score
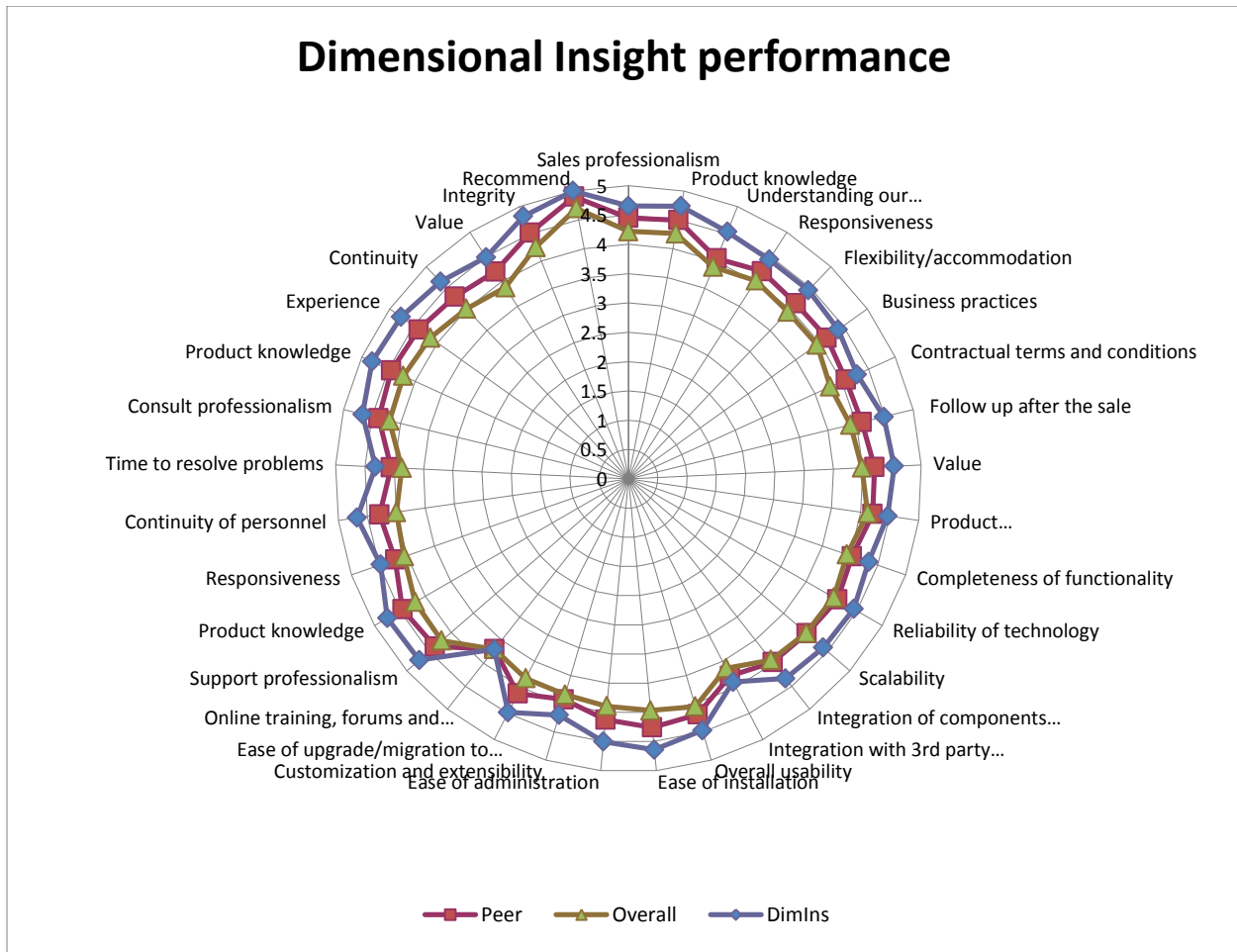
Figure 71. Dimensional insight detailed score

A member of the "Specialized" market segment, Dimensional Insight is its leader again for 2014. It is "best in class" for most measures across all categories including sales, value, product, technical support, consulting, and integrity and has a perfect recommended score.

Dundas Detailed Score
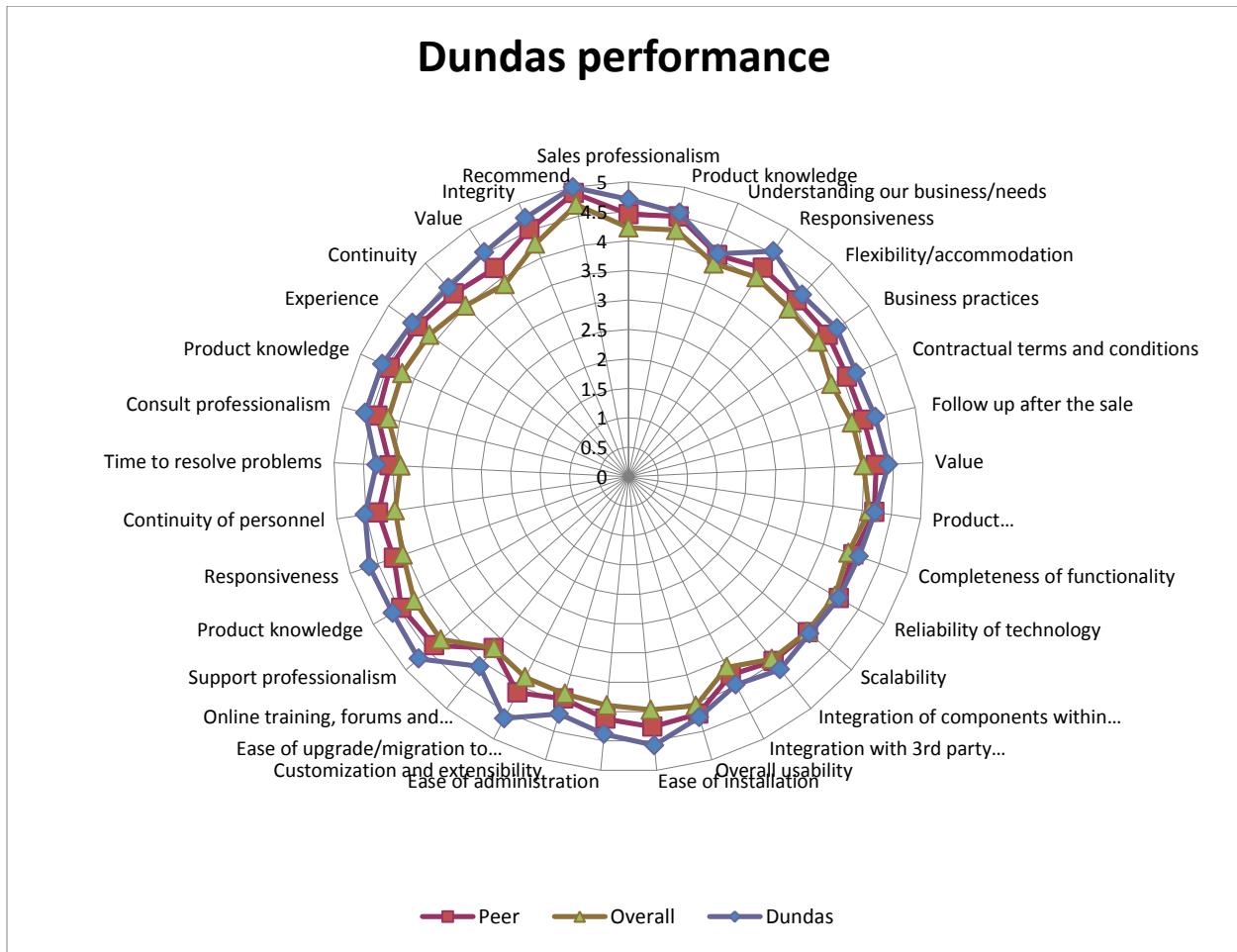
Figure 72. Dundas detailed score

Dundas, a member of the "Specialized" market segment, shows improved performance for all categories of measurement since 2013 including sales, value, product, support, consulting, and integrity. It is generally above peer and overall averages and has a perfect recommended score.

GoodData Detailed Score

GoodData performance
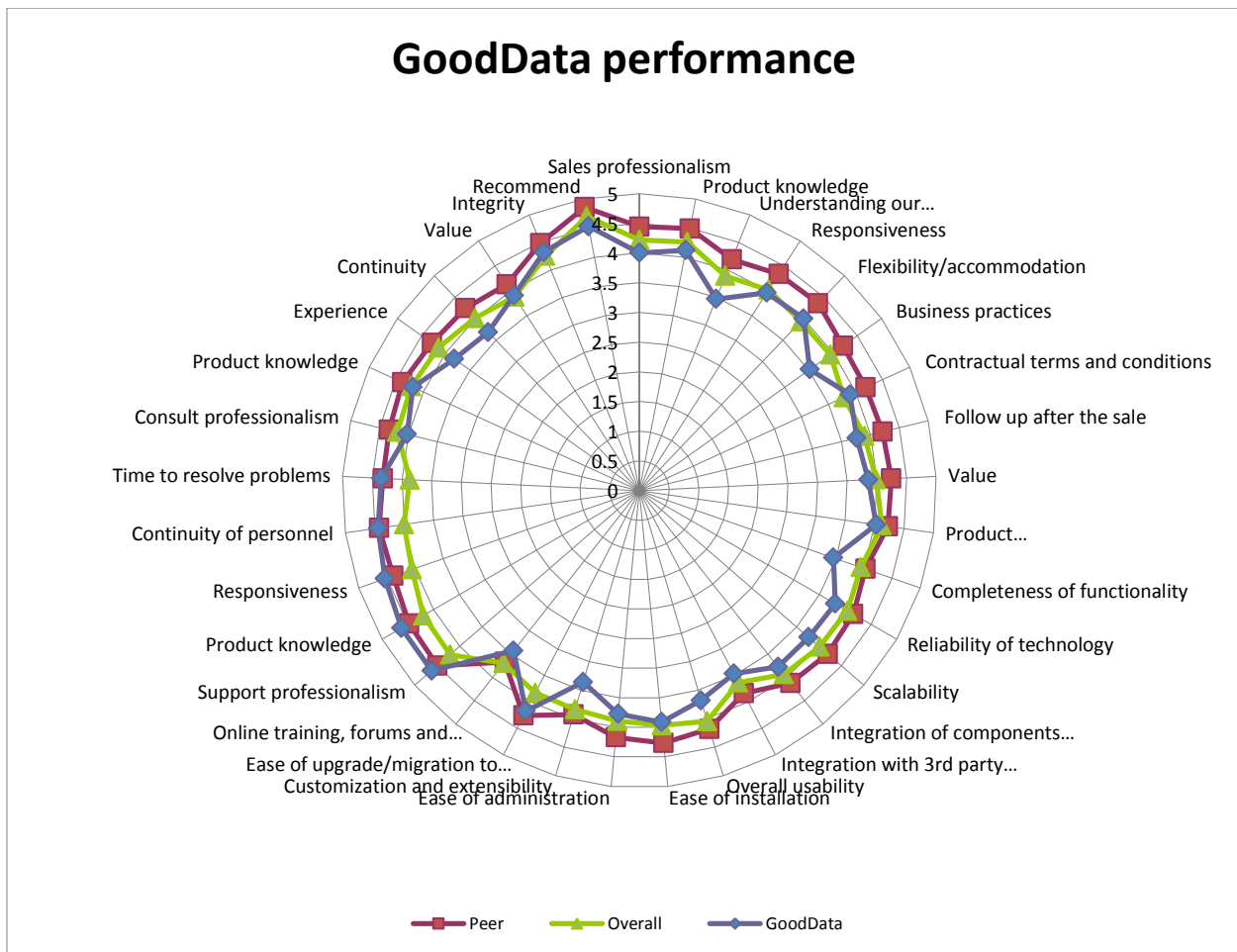
Figure 73. GoodData detailed score

GoodData, a new entrant in the Emerging market segment, is generally in line with peer averages for technical support, integrity, and several product attributes. Other measures are generally below both averages.

IBM Detailed Score

IBM performance
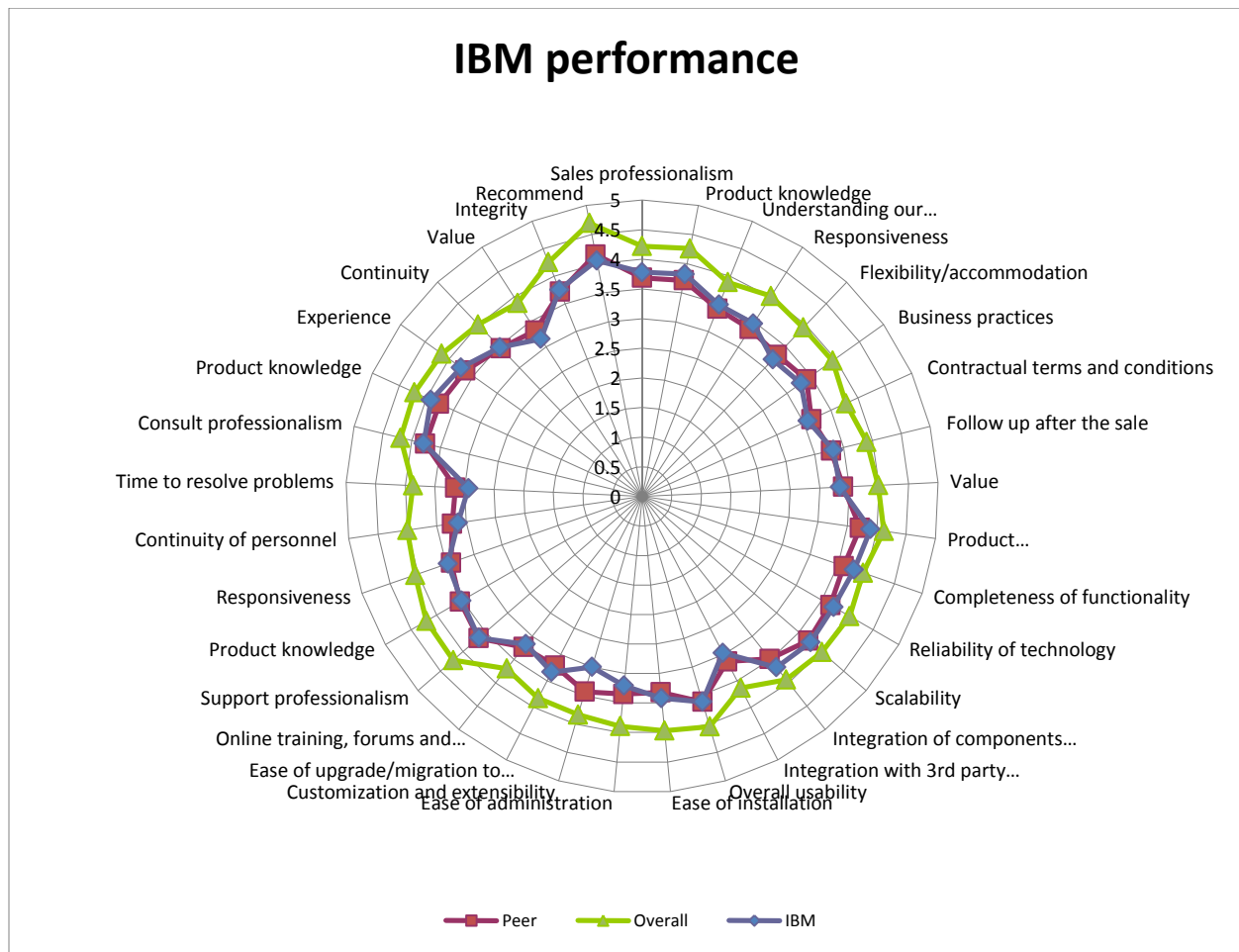
Figure 74. IBM detailed ranking

A member of the "Titan" market segment, IBM is generally in line with or slightly above peer averages. It is best in class for product robustness/sophistication, and its value score increased since 2013.

Infor Detailed Score
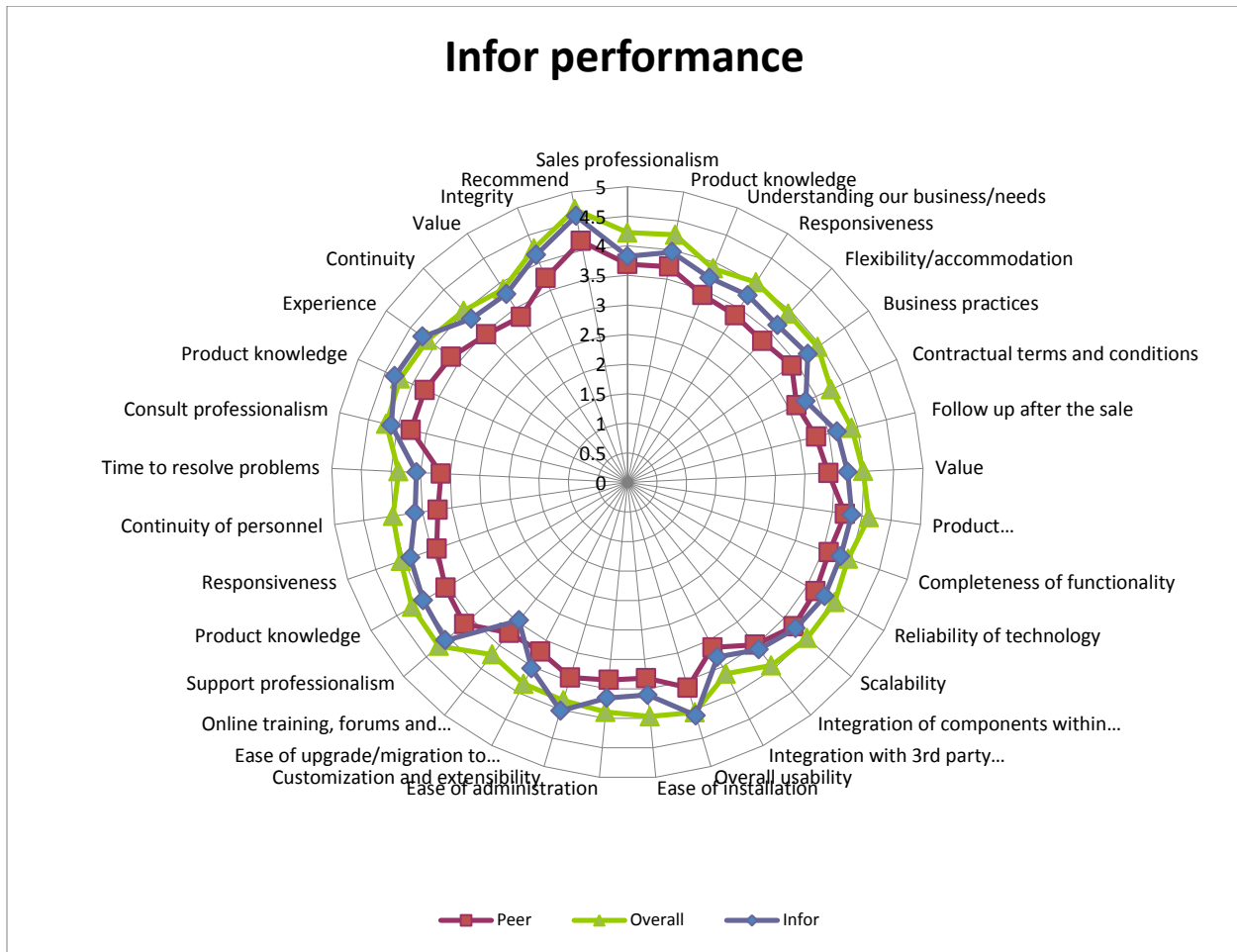
Figure 75. Infor detailed score

A member of the "Titan" market segment, Infor is positioned as its leader again for 2014. It exceeds peer averages for virtually all measures and improved its performance since 2013 in sales, value, technical support, consulting, and integrity.

Information Builders Detailed Score
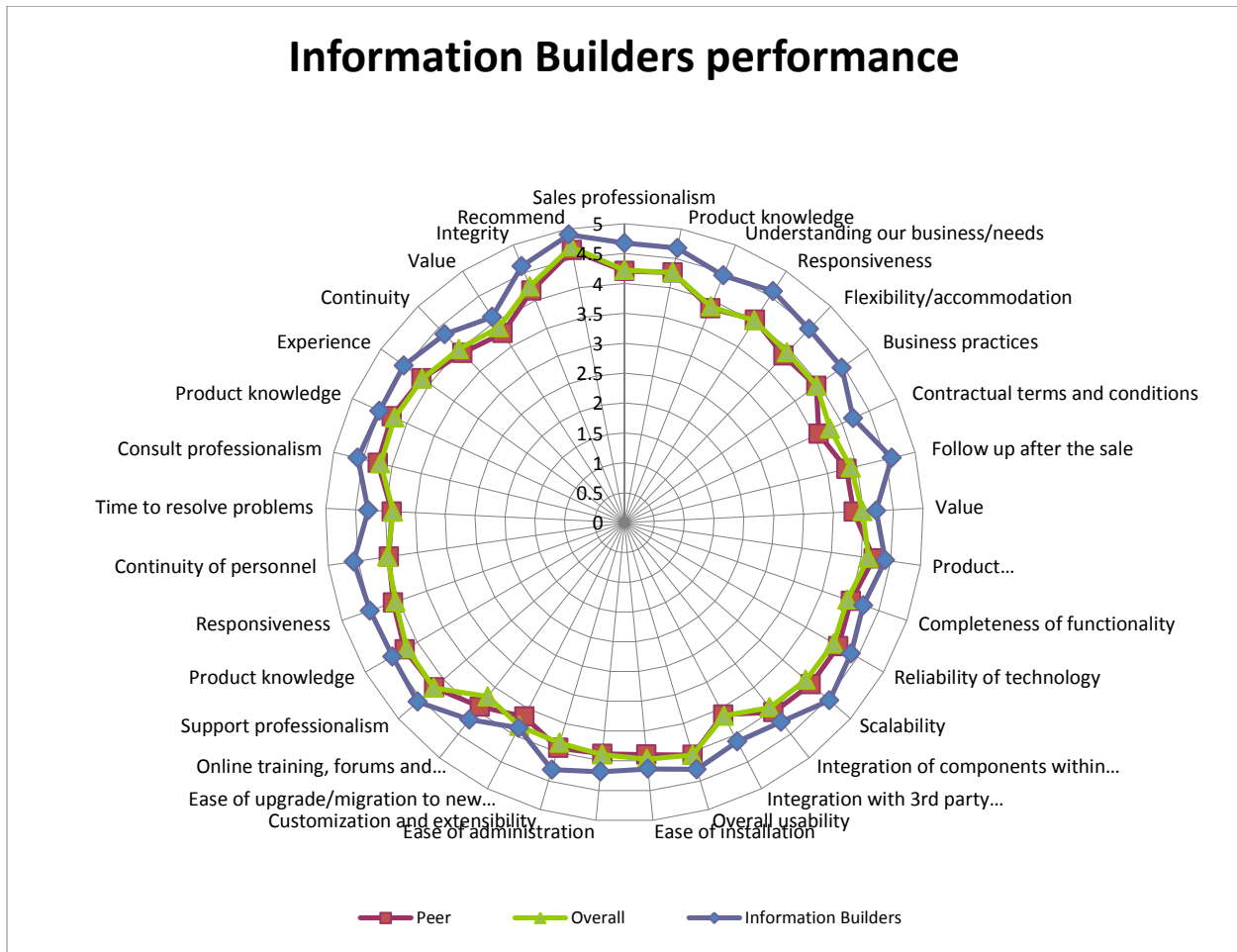
Figure 76. Information Builders detailed score

A member of the "Large Established Pure-Play" market segment, Information Builders leads the segment for a fifth year in a row. It scores above peer and overall averages and is best in class for most measures.

Jaspersoft Detailed Score
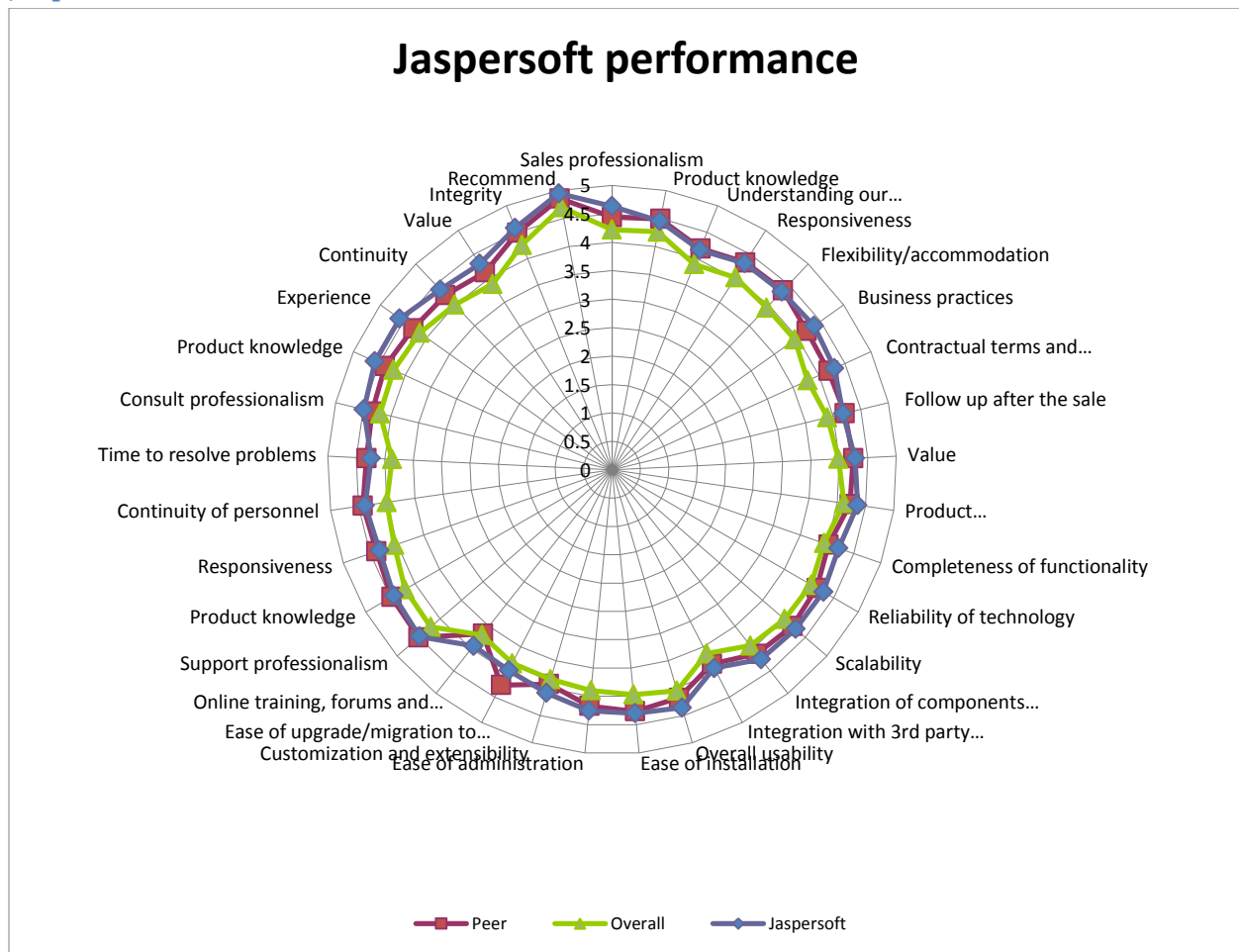
Figure 77. Jaspersoft detailed score

A member of the "Emerging" market segment, Jaspersoft substantially increased performance across virtually all categories compared to 2013. This includes sales, product, technical support, consulting, integrity, and recommend. It is best in class for online training, forums, and documentation and several consulting measures.

Jedox Detailed Score
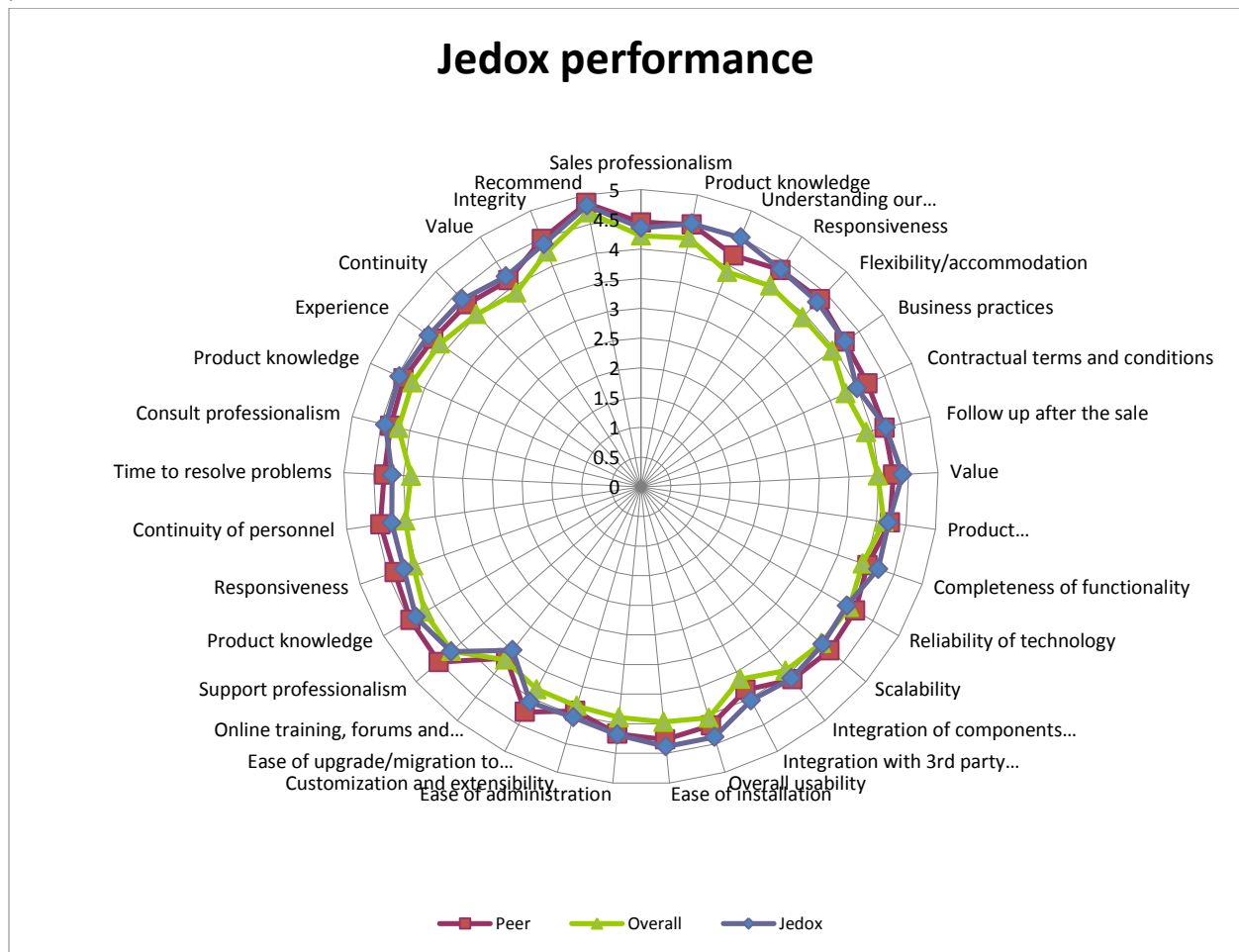
Figure 78. Jedox detailed score

A member of the "Emerging" market segment, Jedox is generally in line with peer averages. It has shown improvements in sales, value, product, consulting, and integrity since 2013.

JinfoNet (JReports) Detailed Score
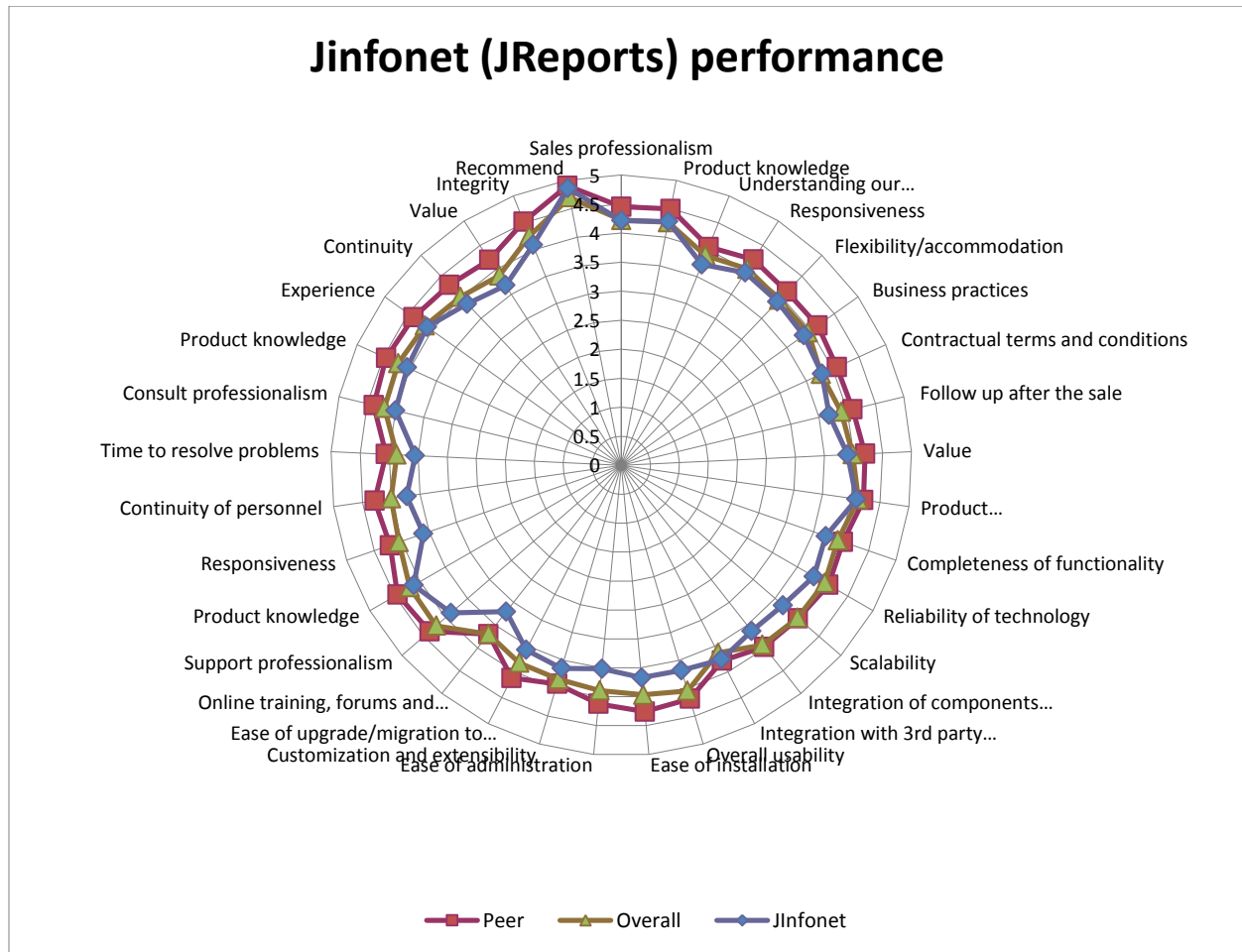
Figure 79. Jinfonet detailed score

A first-time entrant in the Specialized segment, Jinfonet is generally below peer and overall scores for most measures.

Logi Analytics Detailed Score
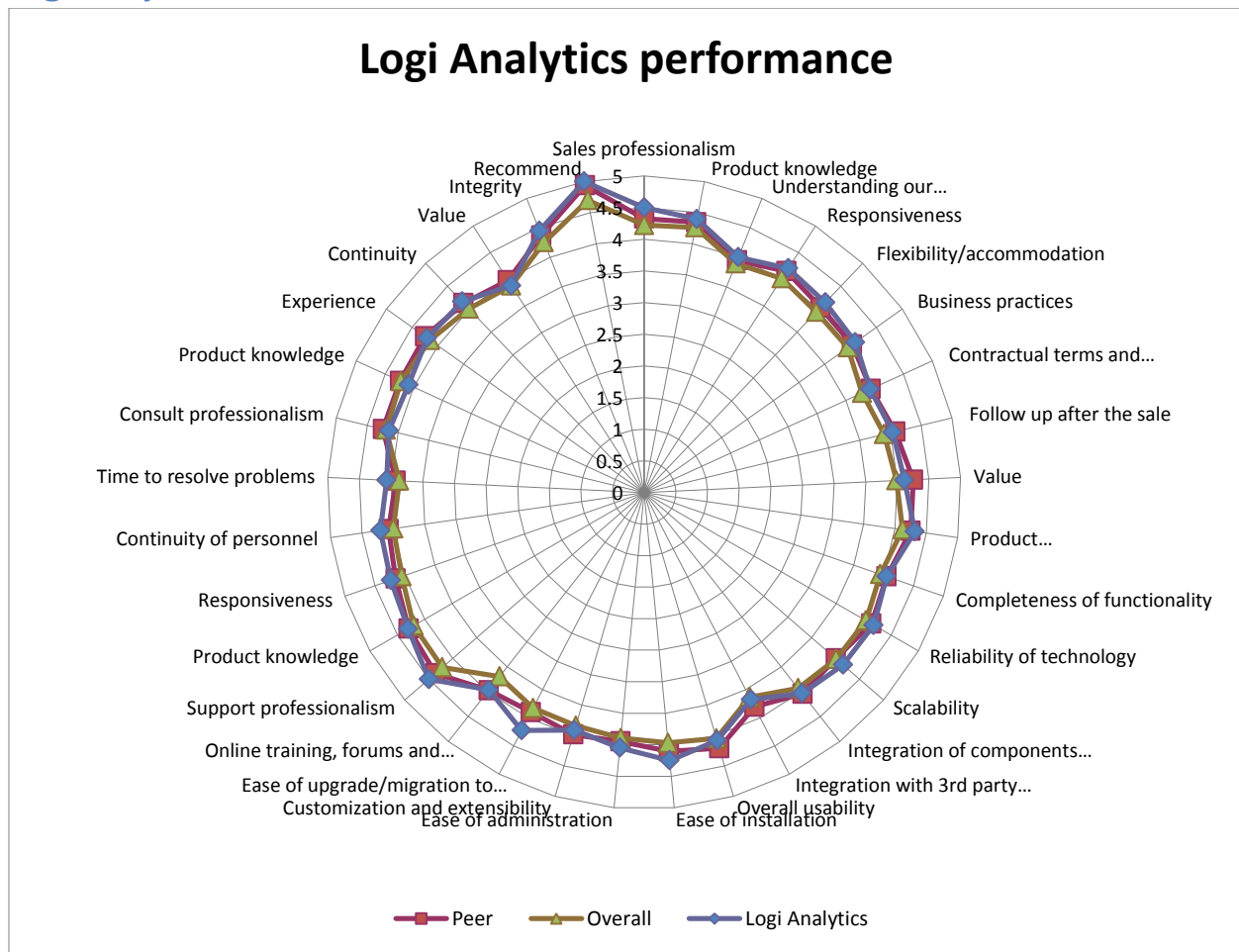
Figure 80. Logi Analytics detailed score

A member of the "High-Growth" market segment, Logi Analytics shows an improvement for all categories of measurement since 2013 including sales, value, product, support, consulting, recommended, and integrity. It is generally in line with peer and overall averages.

Microsoft Detailed Score
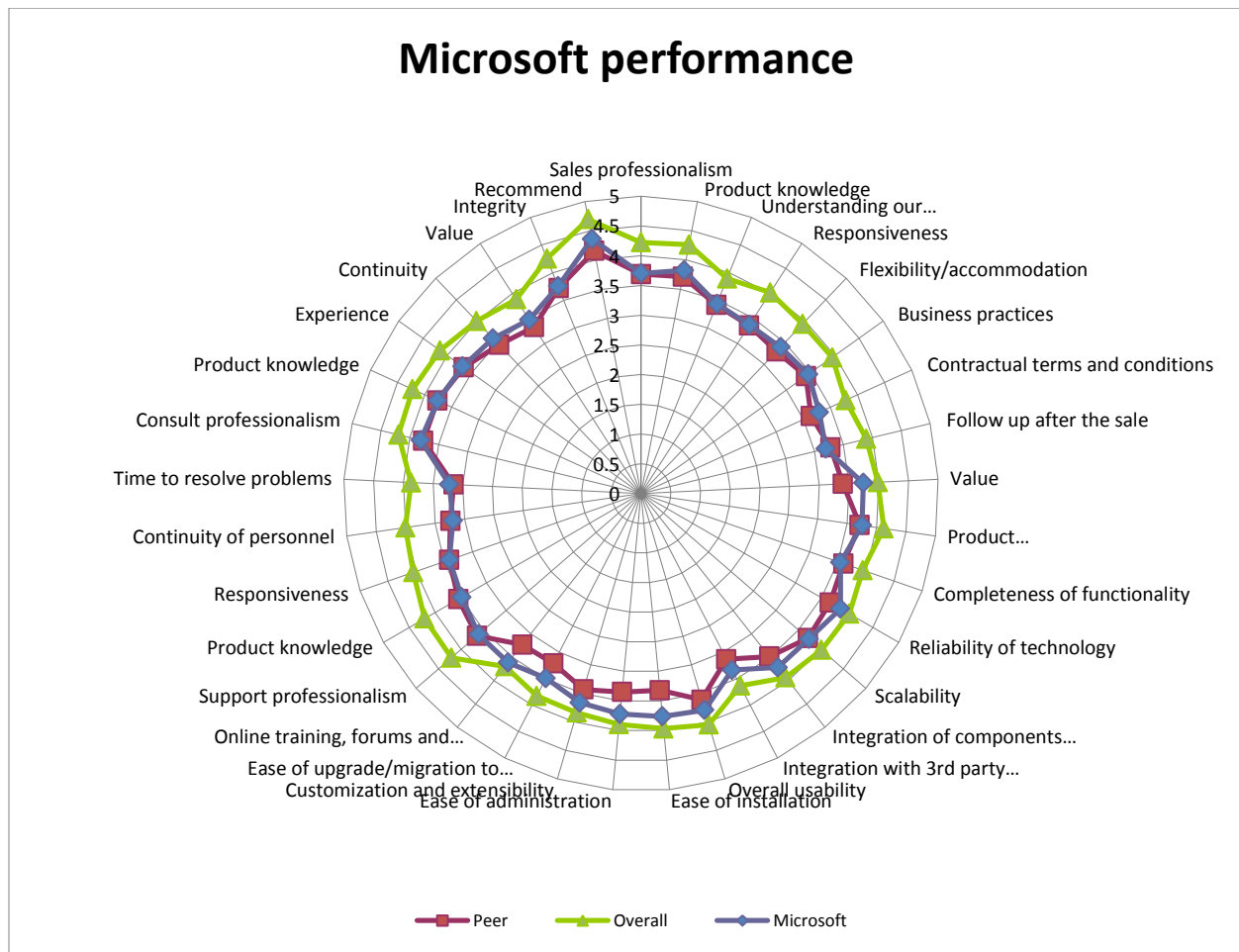
Figure 81. Microsoft detailed score

A member of the "Titan" market segment, Microsoft is in line with or above its peer group for most measures. It is best in class for value and a number of product measures.

MicroStrategy Detailed Score

MicroStrategy performance
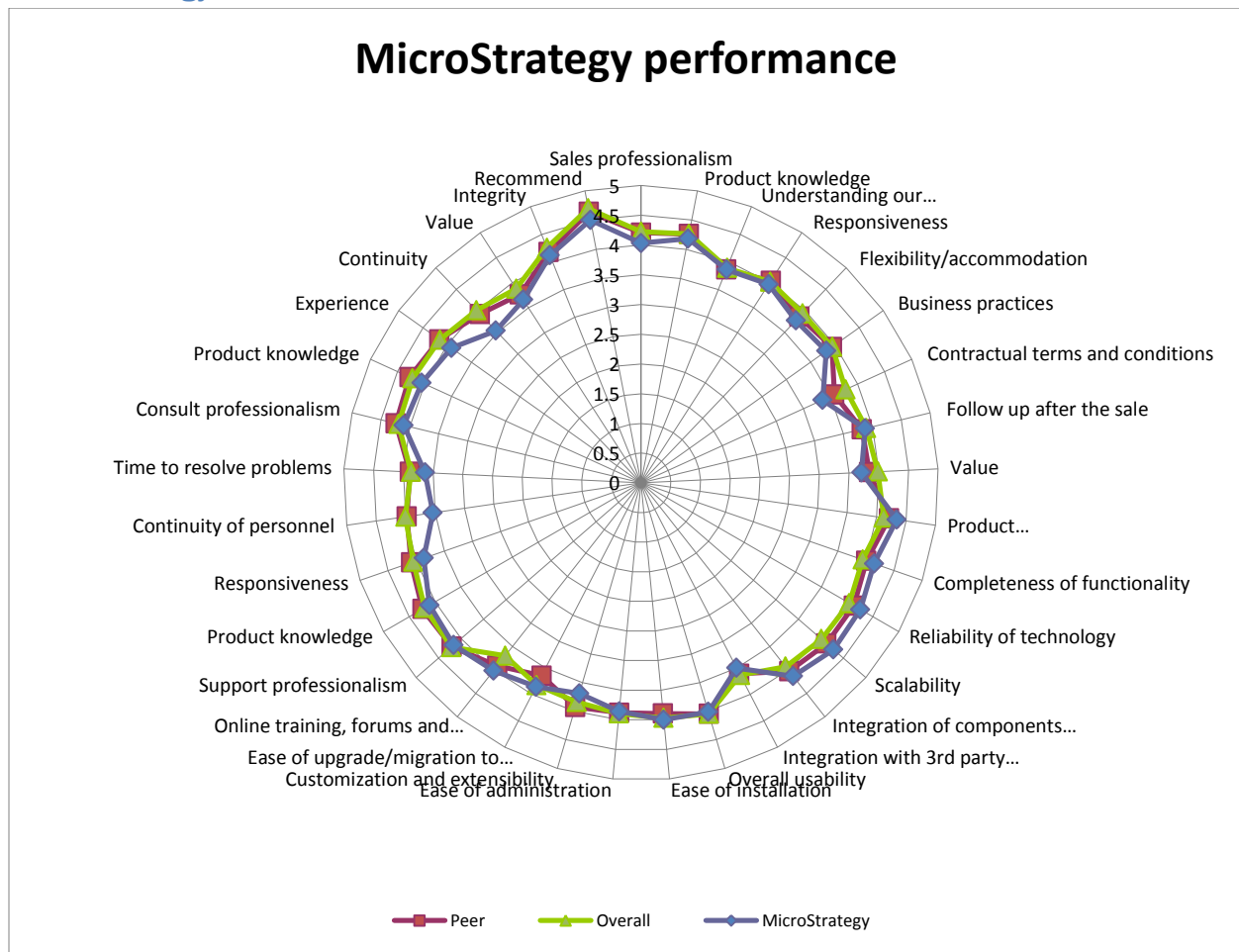
Figure 82. MicroStrategy detailed score

A member of the "Large Established Pure-Play" market segment, MicroStrategy shows improved performance across all categories of measurement compared to 2013 including sales, value, product, support, consulting, integrity, and recommend. It is generally in line with peer and overall averages.

Oracle Detailed Score
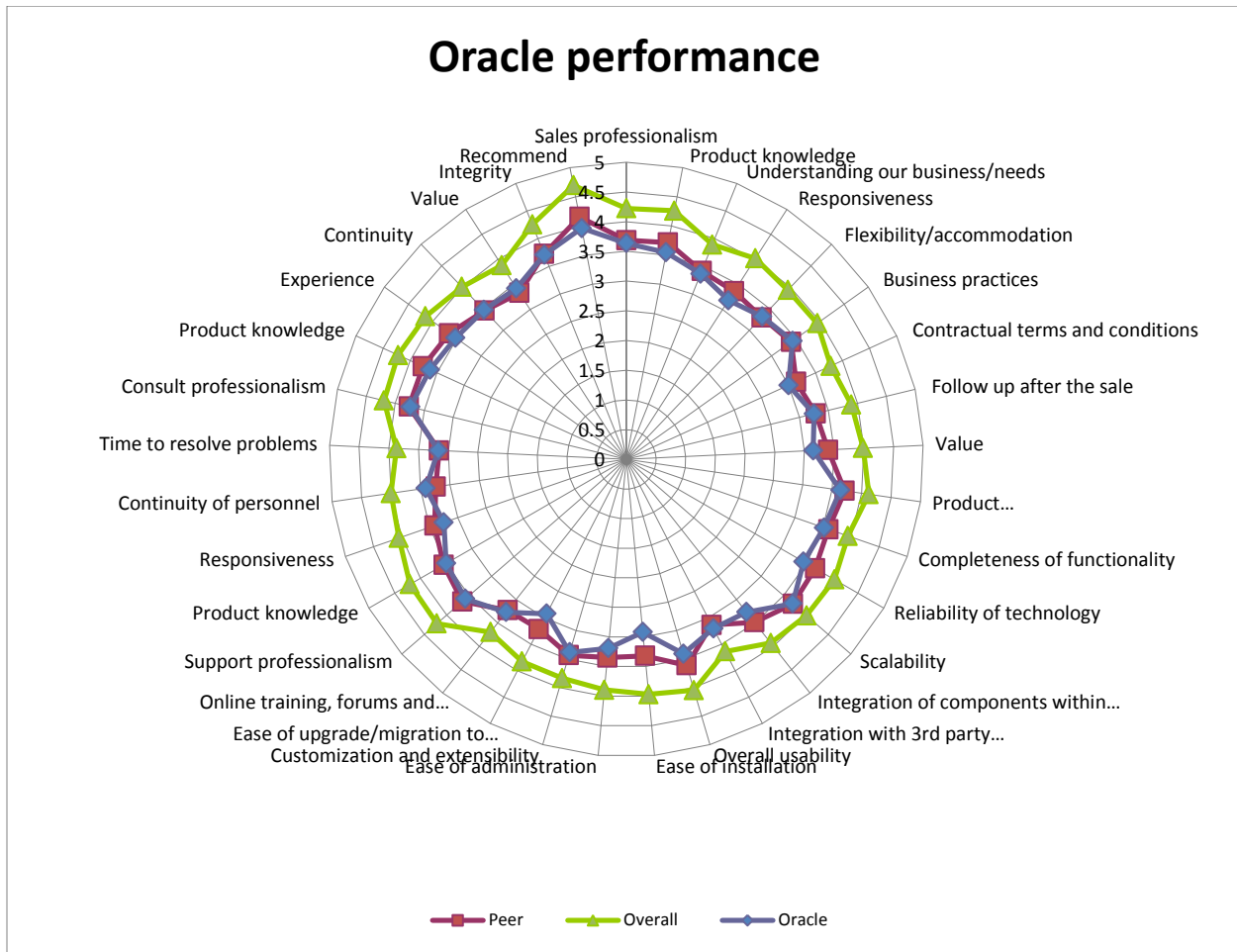
Figure 83. Oracle detailed score

A member of the "Titan" market segment, Oracle is generally in line with or slightly below its peer group. It shows a slight improvement since 2013 for integrity and consulting.

Pentaho Detailed Score
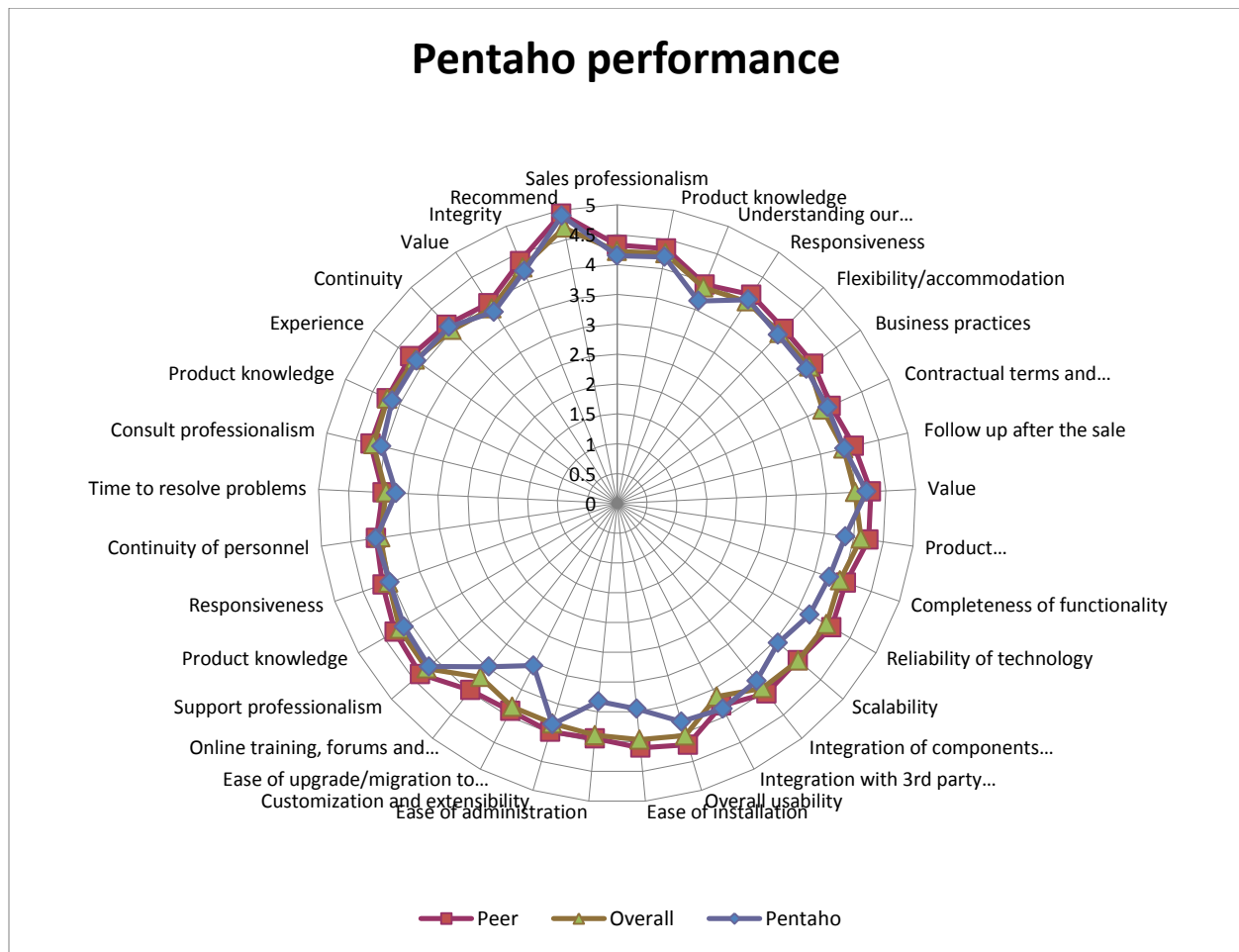
Figure 84. Pentaho detailed score

Pentaho is a member of the High-Growth segment. It is generally in line with peer and overall averages with the exception of a number of key product measures where it is below both averages.

Phocas Detailed Score

Phocas performance
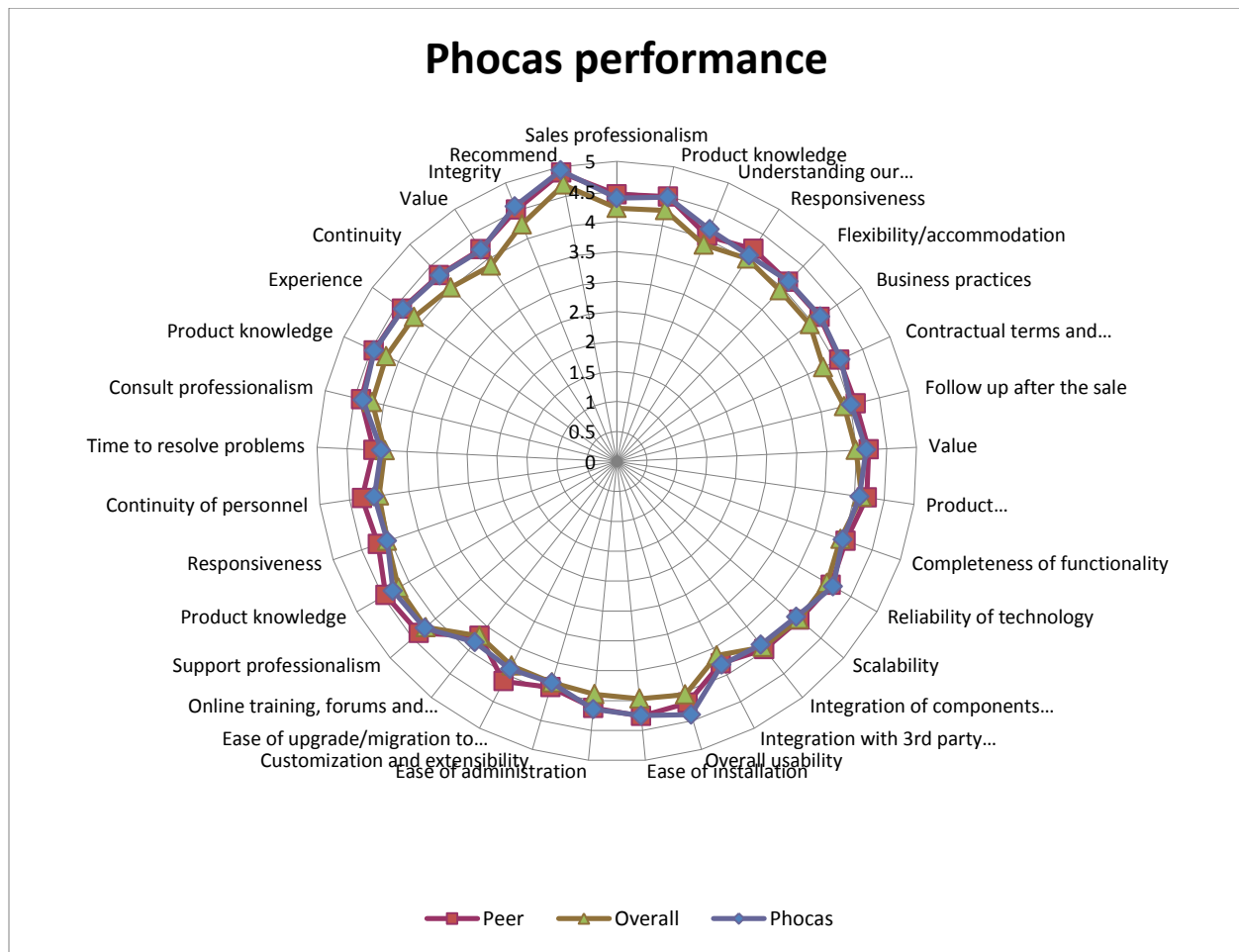
Figure 85. Phocas detailed score

Phocas is a member of the "Specialized" market segment and is generally in line with peer and above overall averages. It improved since 2013 in both product and support categories of measurement.

Qlik Detailed Score
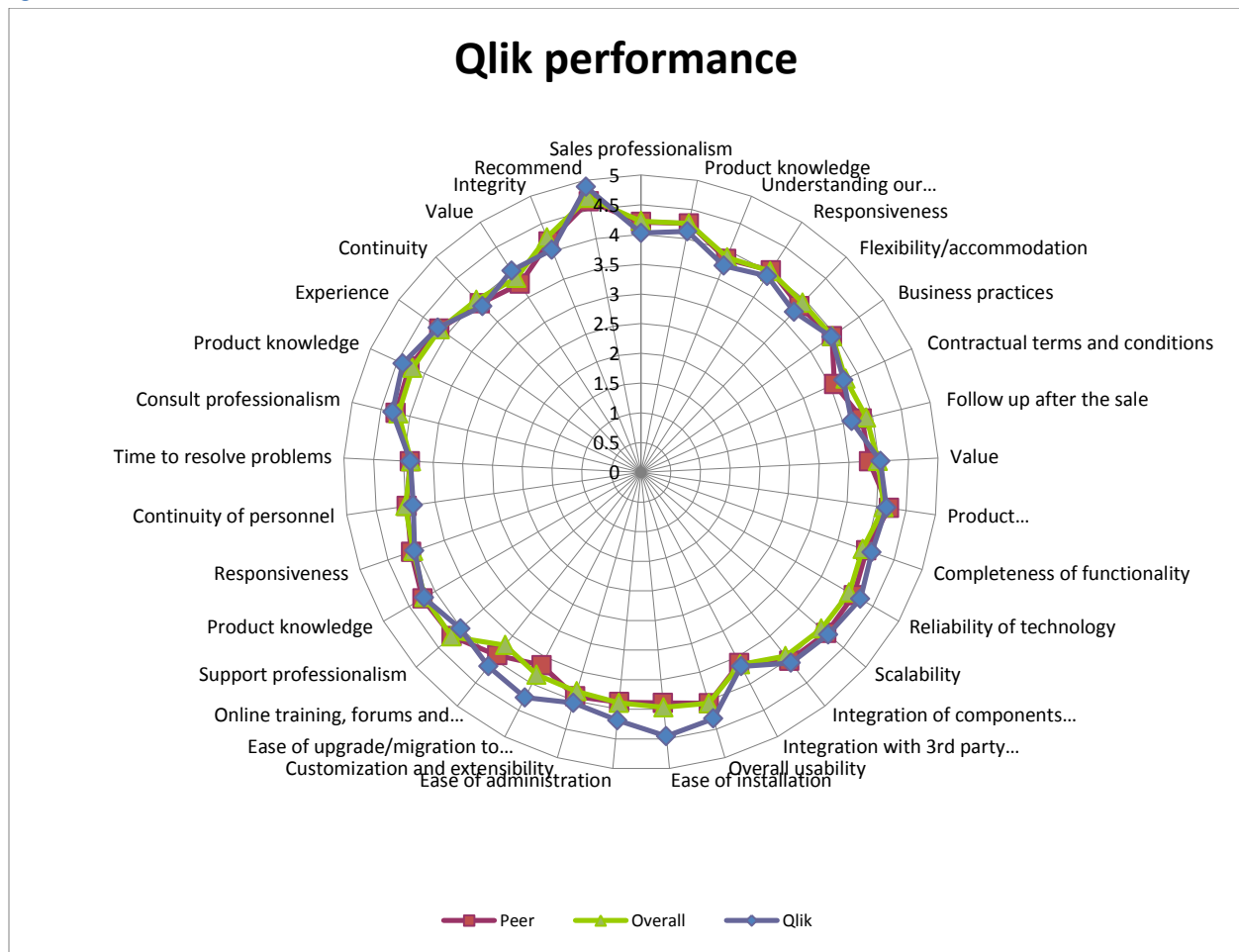
Figure 86. Qlik detailed score

A member of the "Large Established Pure-Play" market segment, Qlik increased its performance compared to 2013 for support and consulting. It is best in class for overall product usability, ease of installation, ease of administration, and ease of upgrade.

SAP Detailed Score
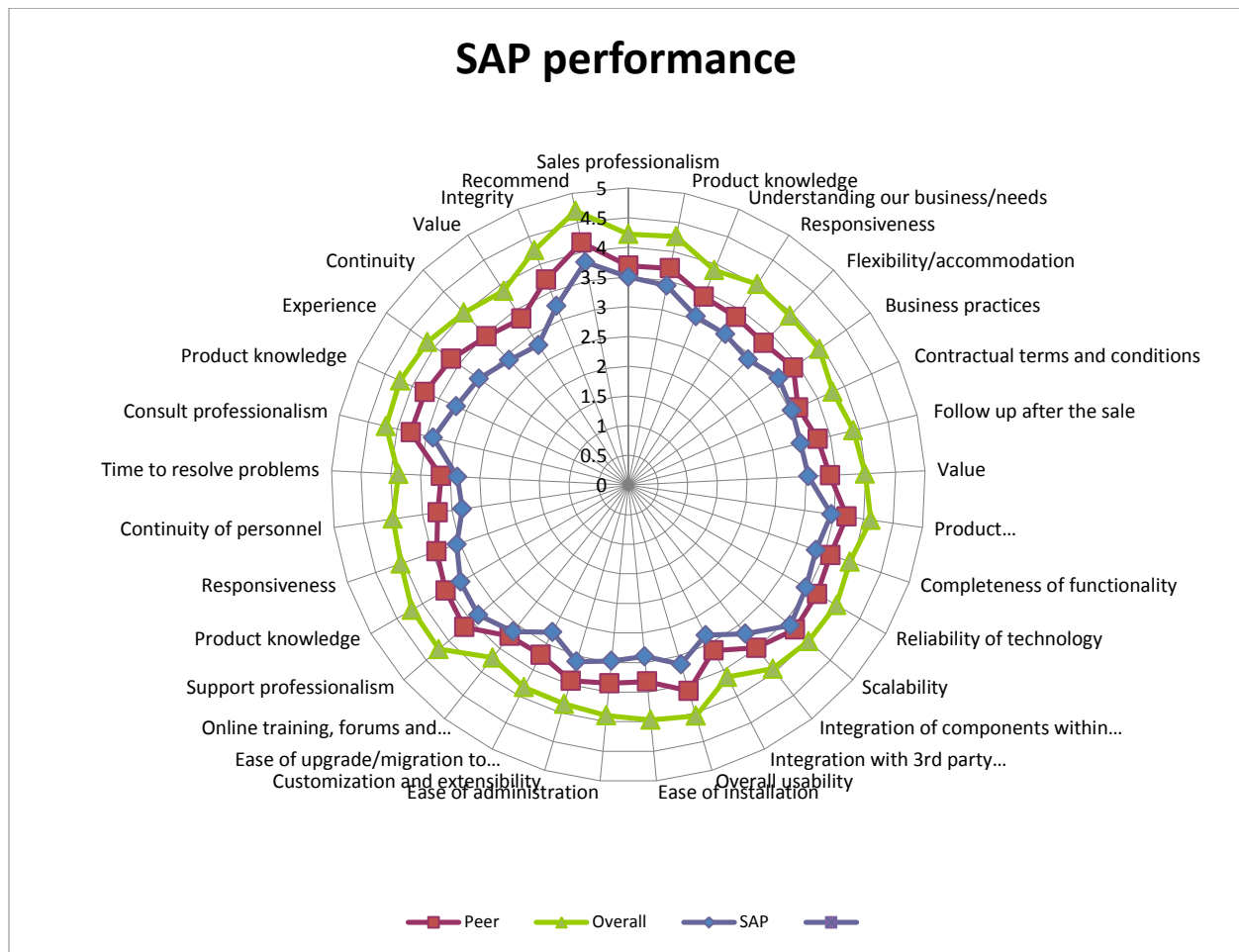
Figure 87. SAP detailed score

A member of the "Titan" market segment, SAP is generally below peer averages for all measures.

SAS Detailed Score
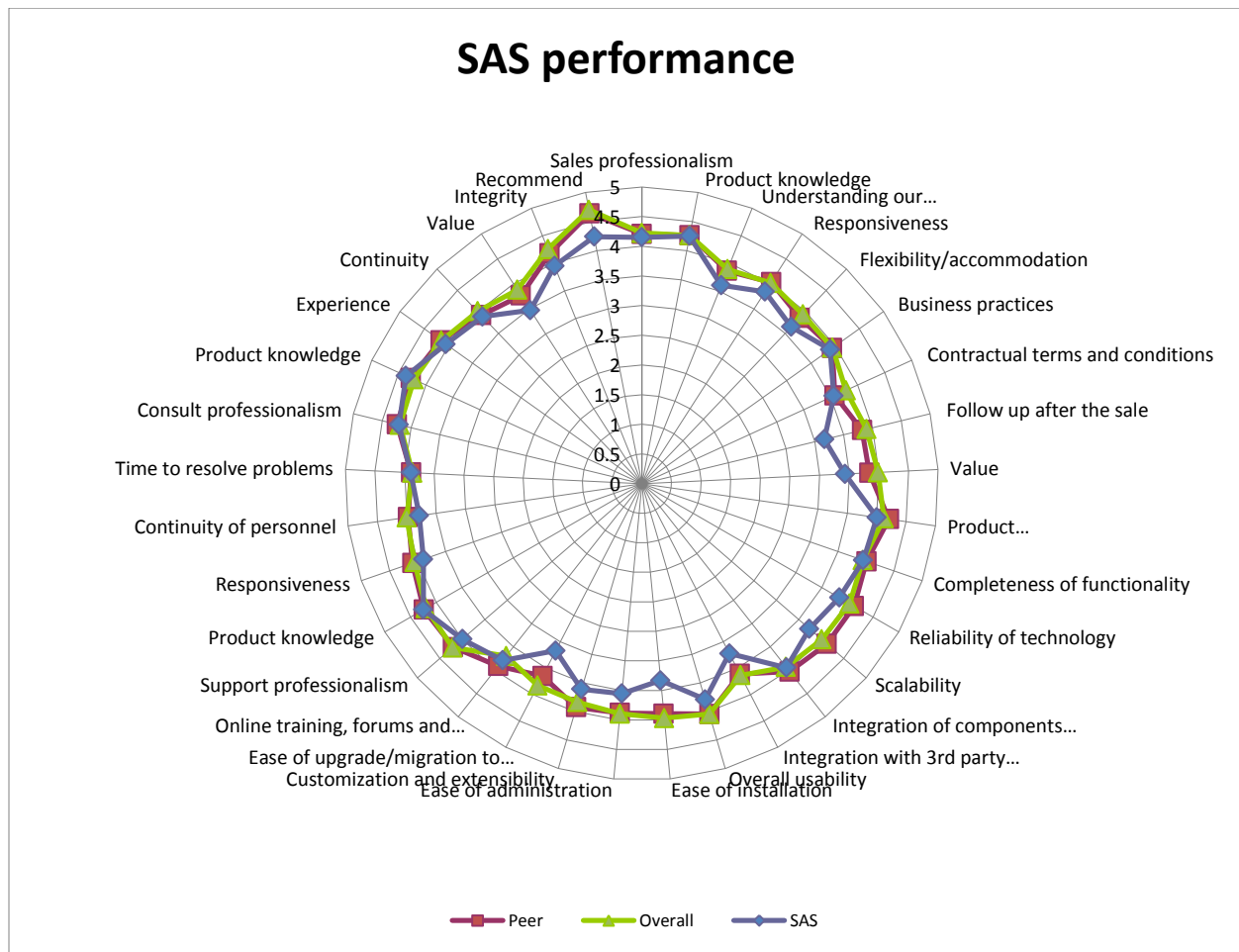
Figure 88. SAS detailed score

A member of the "Large Established Pure-Play" market segment, SAS is generally in line with or below peer averages. It shows improved performance since 2013 for consulting.

Tableau Detailed Score
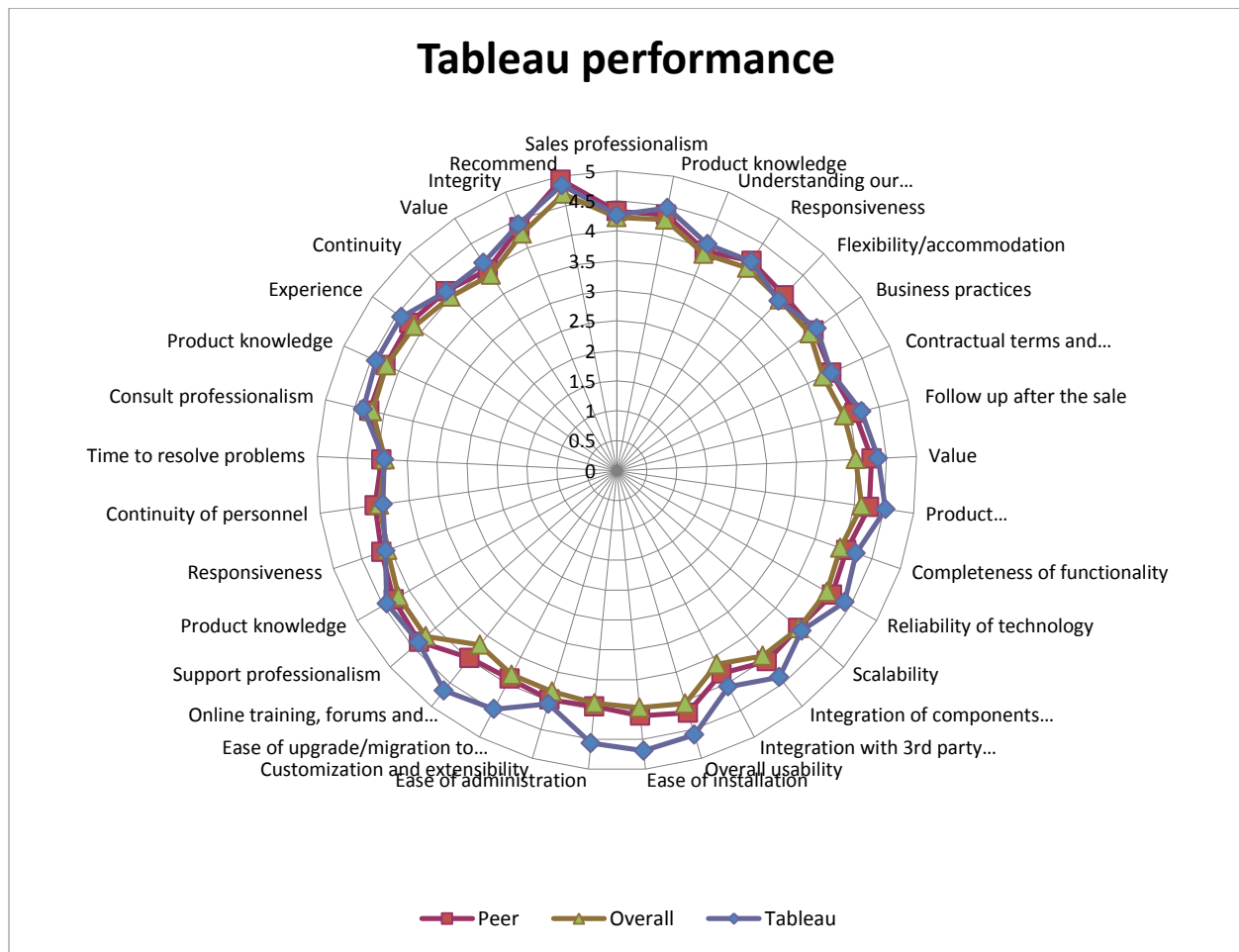
Figure 89. – Tableau detailed score

A member of the "High-Growth" market segment, Tableau is again ranked as its leader. It is best in class across almost all categories of measurement including sales, value, technology/product, technical support, and integrity.

Targit Detailed Score
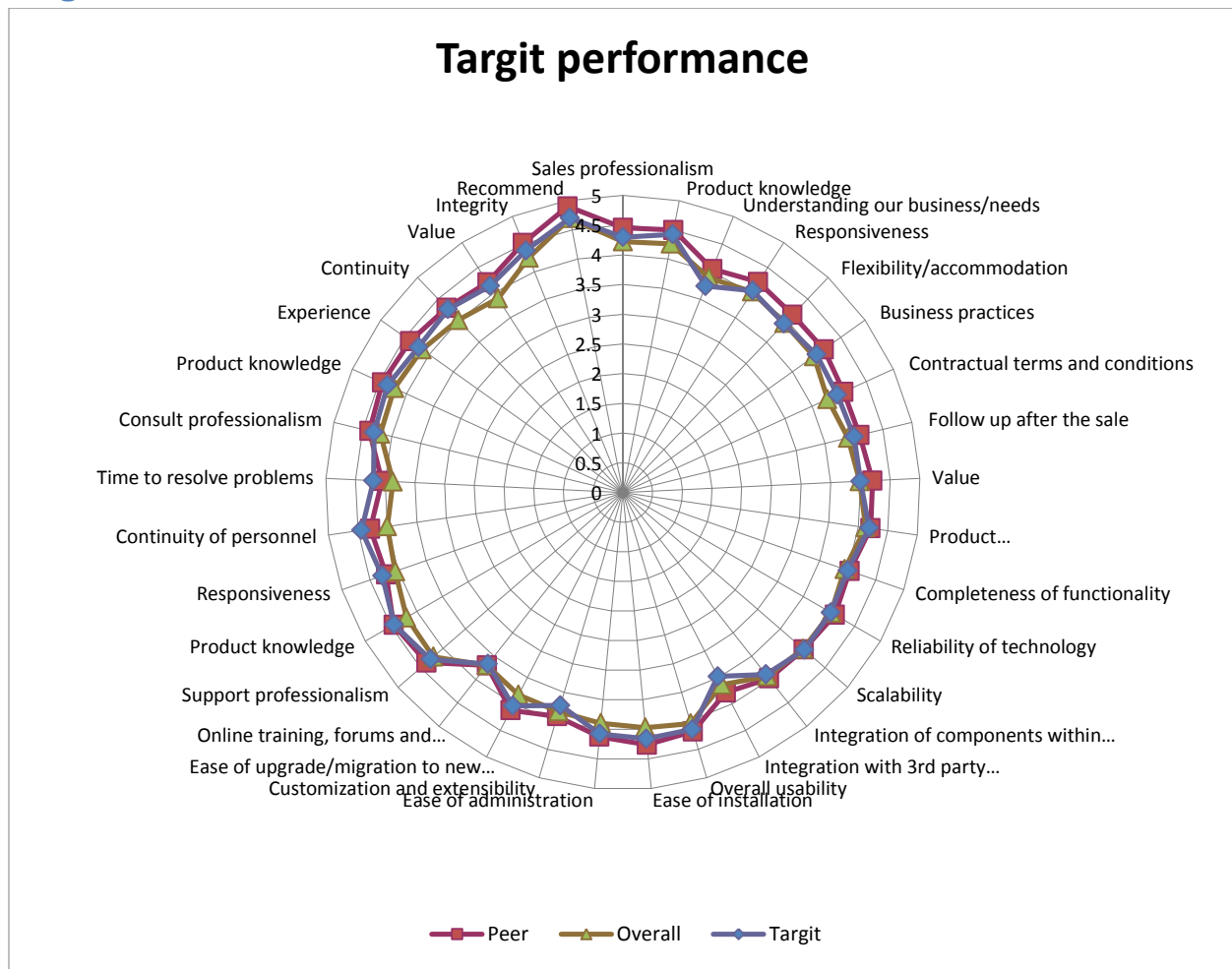
Figure 90. Targit detailed score

A new entrant in the Specialized segment, Targit is generally in line with or slightly below peer averages and above the overall sample.

TIBCO Spotfire Detailed Score
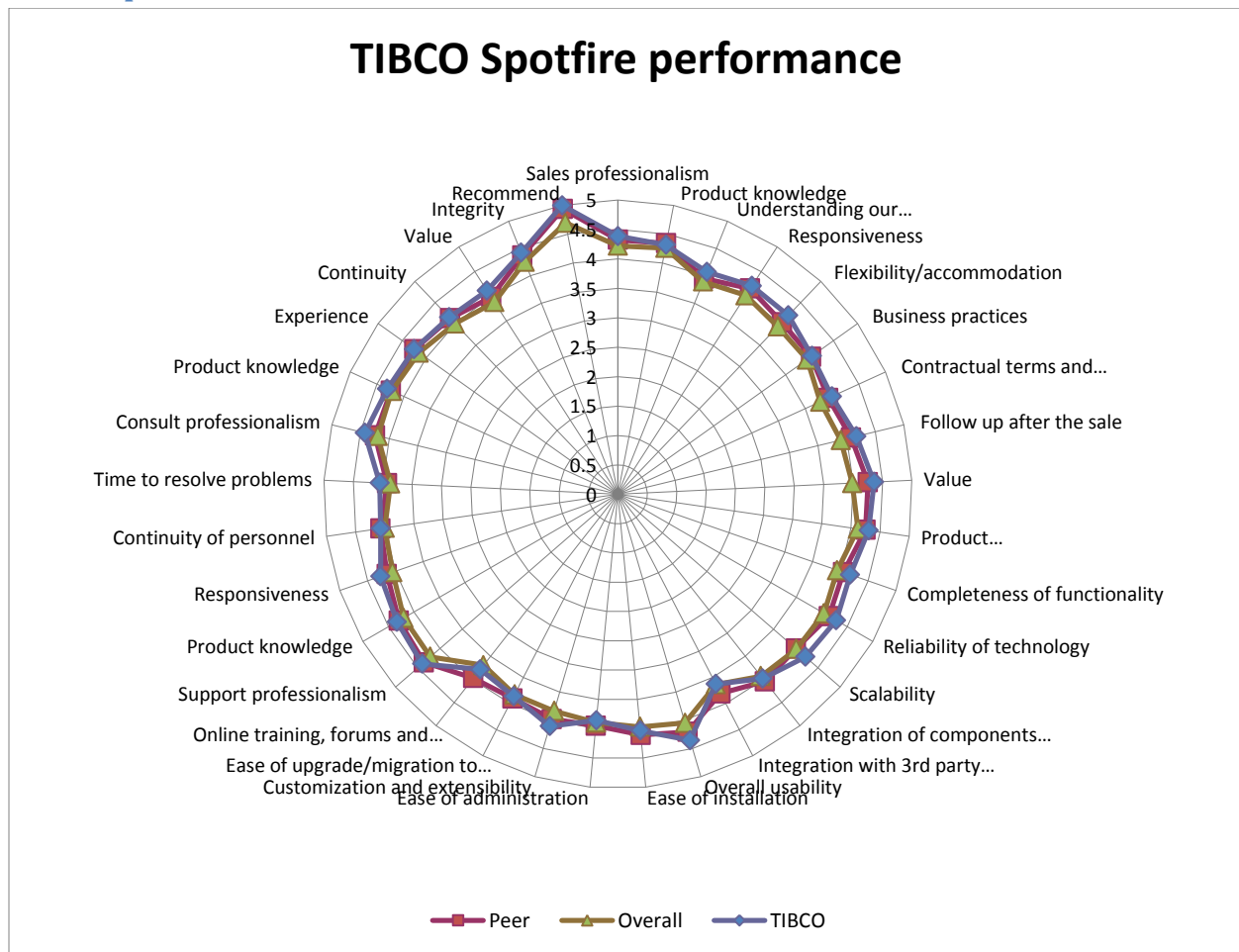
Figure 91. TIBCO Spotfire detailed score

A member of the "High-Growth" market segment, TIBCO Spotfire shows improvement since 2013 for value, support, and consulting and is best in class for several sales, product, support, and consulting measures as well as overall value. It has a perfect recommend score.

Early-Stage Vendors

In this section, we examine several smaller vendors that are very young (embryonic), with a limited number of customers, yet show potential. Their scores tend to be quite high as they offer concierge-style service to a relatively small community of users. They tend to offer innovation but with greater risk than larger, better established vendors.

Early-stage vendors that sufficiently mature and grow may be considered for inclusion in our core market segments and rankings in the future.

Early-stage vendors included this year are Rapid Miner, Intuitive BI, and Exago.
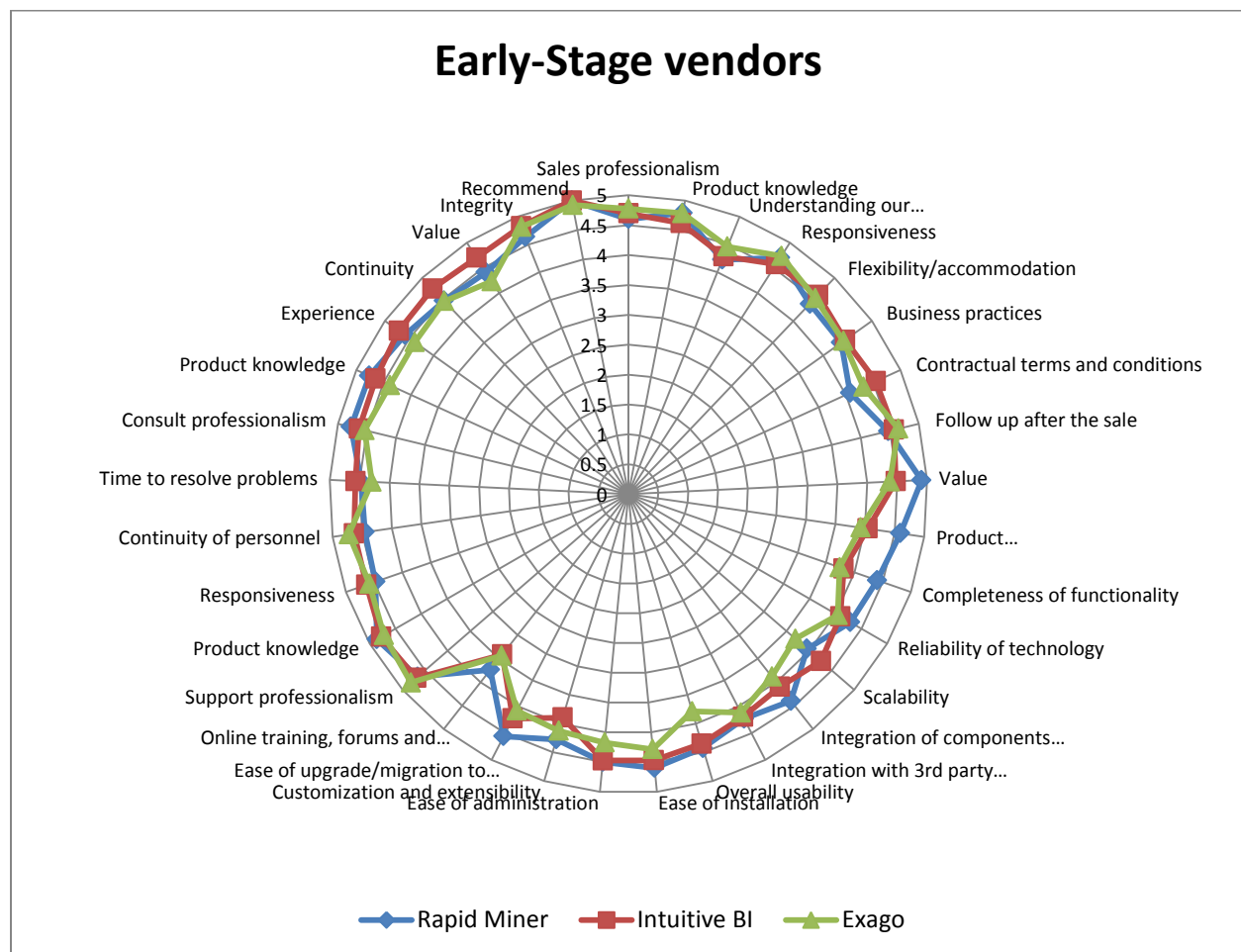
Figure 92. Early-stage vendor scores

Appendix - The 2014 Wisdom of Crowds® Business Intelligence Market Survey Instrument

Welcome to the Wisdom of Crowds ® Business Intelligence Market Study - 2014 Edition.

Qualified users that complete the survey will get a complimentary copy of findings for their personal use.

The objective of this study is to collect data on trends, vendors and products in the Business Intelligence marketplace. As a result we will be able examine the realities, plans and perceptions surrounding this important market. We will also rank vendors and products - creating an important tool for those seeking to invest in Business Intelligence Solutions.

The underlying principle is this: the more data we collect, the more accurate the results.

This study is NOT sponsored by vendors (or anyone else) and none of your detailed data will be shared with the outside world. So, we respectfully request that you provide us with complete and accurate information - including your name, company, title and business email address.

Incomplete survey entrees cannot be accepted.

Thank you for participating. I am confident that this will provide an important and fresh perspective into the marketplace for all!

Sincerely,

Howard Dresner
Chief Research Officer
Dresner Advisory Services, LLC

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✱1. To receive a copy of the analysis, please provide your contact information below:. This information will be kept confidential:

Name (Required):

Company (Required):

Address 1:

City/Town:

State:

ZIP/Postal Code:

Country:

Company Email Address (Required):

Phone Number:

2. May we contact you to discuss your responses and for additional information?

○ Yes

○ No

✱3. What major geography do you reside in? (Required)

○ North America ○ Europe, Middle East, & Africa ○ Latin America ○ Asia Pacific

4. What is your current title?

5. What function are you primarily a part of?

○ Business Intelligence Competency Center   ○ Information Technology (IT)   ○ Research and Development (R&D)

○ Executive Management   ○ Manufacturing   ○ Sales

○ Faculty (Education)   ○ Marketing   ○ Strategic Planning Function

○ Finance   ○ Medical Staff (Healthcare)   ○ Supply Chain

○ Human Resources   ○ Operations

Other (please specify)

1. Please identify your primary industry

○ Advertising	○ Distribution & Logistics	○ Mining
○ Aerospace	○ Education (Higher Ed)	○ Motion Picture & Video
○ Agriculture	○ Education (K-12)	○ Not for profit
○ Apparel & Accessories	○ Energy	○ Pharmaceuticals
○ Automotive	○ Entertainment & Leisure	○ Publishing
○ Aviation	○ Executive Search	○ Real Estate
○ Biotechnology	○ Federal Government	○ Retail & Wholesale
○ Broadcasting	○ Financial Services	○ Sports
○ Business Services	○ Food, Beverage & Tobacco	○ State and Local Government
○ Chemical	○ Health Care	○ Technology
○ Construction	○ Hospitality	○ Telecommunications
○ Consulting	○ Insurance	○ Transportation
○ Consumer Products	○ Legal	○ Utilities
○ Defense	○ Manufacturing	

Other (please specify)

_____

1. How many employees does your company employ worldwide?

- ○ 1 - 25
- ○ 26-100
- ○ 101 - 1,000
- ○ 1,001 - 2,000
- ○ 2,001 - 5,000
- ○ 5,001 - 10,000
- ○ More than 10,000

2. Please respond to the following statement:

"My organization considers our Business Intelligence initiatives a success."

- ○ Completely agree
- ○ Agree Somewhat
- ○ Disagree Somewhat
- ○ Disagree

Why have they been successful or unsuccessful?

3. Which function drives your Business Intelligence initiatives?

	Always	Often	Sometimes	Rarely	Never
Operations	○	○	○	○	○
Executive Management	○	○	○	○	○
Business Intelligence Competency Center	○	○	○	○	○
Research and Development (R&D)	○	○	○	○	○
Sales	○	○	○	○	○
Finance	○	○	○	○	○
Marketing	○	○	○	○	○
Strategic Planning Function	○	○	○	○	○
Information Technology (IT)	○	○	○	○	○
Manufacturing	○	○	○	○	○
Supply Chain	○	○	○	○	○
Faculty (Education)	○	○	○	○	○
Human Resources	○	○	○	○	○

4. What does your organization expect to achieve with Business Intelligence?

	Critical	Very Important	Important	Somewhat Important	Unimportant
Better decision-making	○	○	○	○	○
Growth in revenues	○	○	○	○	○
Improved operational efficiency	○	○	○	○	○
Enhanced customer service	○	○	○	○	○
Increased competitive advantage	○	○	○	○	○

Other (please specify)

5. Who are the targeted consumers of Business Intelligence within your organization?

	Primary	Secondary	Not applicable
Executives	○	○	○
Middle Managers	○	○	○
Line Managers	○	○	○
Individual Contributors & Professionals	○	○	○
Customers	○	○	○
Suppliers	○	○	○

Other (please specify)

6. What percentage of all employees have access to Business Intelligence solutions?

	Today	In 12 months	In 24 months	In 36 months
Under 10%	○	○	○	○
11 - 20%	○	○	○	○
21 - 40%	○	○	○	○
41 - 60%	○	○	○	○
61 - 80%	○	○	○	○
81% or more	○	○	○	○

Other (please specify)

7. Please choose one of the following to describe the state of data governance in your organization.

○ Data as "truth" - A common view of enterprise data is available with common application of data, filters, rules, and semantics.

○ A common view of enterprise data is available. However, parochial views and semantics are used to support specific positions

○ Consistent data is available at a departmental level. Conflicting, functional views of data causes confusion and disagreement

○ We have multiple, inconsistent data sources with conflicting semantics and data. Information is generally unreliable and distrusted

8. How do people in your organization take advantage of insights learned from Business Intelligence solutions?

- ○ "Closed loop" processes ensure timely, concerted action
- ○ Ad hoc (informal) action on insights across functions
- ○ Uncoordinated/ parochial action (sometimes at the expense of others)
- ○ Insights are rarely leveraged

*9. Please indicate the importance of the following technologies to your Business Intelligence strategy and plans. (Required)

	Critical	Very Important	Important	Somewhat Important	Not Important
Data Discovery	○	○	○	○	○
Location Intelligence/Analytics	○	○	○	○	○
Mobile Device Support	○	○	○	○	○
Text Analytics	○	○	○	○	○
Complex Event Processing (CEP)	○	○	○	○	○
Integration with Operational Processes	○	○	○	○	○
Ability to write to transactional applications	○	○	○	○	○
In-memory analysis	○	○	○	○	○
Big Data (e.g., Hadoop)	○	○	○	○	○
Search-based interface	○	○	○	○	○
End user "self service"	○	○	○	○	○
Open Source Software	○	○	○	○	○
Collaborative Support for Group-based Analysis	○	○	○	○	○
Dashboards	○	○	○	○	○
Advanced visualization	○	○	○	○	○
Data Warehousing	○	○	○	○	○
Social media Analysis (SocialBI)	○	○	○	○	○
"Embedded" BI (contained within an application, portal, etc.)	○	○	○	○	○
End user data "blending" (data mash ups)	○	○	○	○	○
Software-as-a-Service and "Cloud" Computing	○	○	○	○	○
Data Mining, Advanced Algorithms, Predictive	○	○	○	○	○
Pre-packaged vertical/functional analytical applications	○	○	○	○	○

Other (please specify)

10. How many Business Intelligence products are currently being used in your organization today?

○ Don't know	○ 4	○ 8
○ 1	○ 5	○ 9
○ 2	○ 6	○ 10 or more
○ 3	○ 7	

*11. Please specify your primary Business Intelligence tool Vendor.

Healthcare-specific vendors are highlighted in BLUE. Higher Education-specific vendors are highlighted in GREEN

○ 1010 Data	○ IntuitiveBI	○ Yellowfin
○ Actian	○ Jaspersoft	○ Yurbi/5000Fish
○ Actuate	○ Jedox	○ ZAP BI
○ Adaptive Planning	○ Jinfonet/JReport	○ AthenaHealth
○ Advizor Solutions	○ Klipfolio	○ Advisory Board
○ Alpine Data Labs	○ Lavastorm	○ Allscripts
○ Alteryx	○ LogiAnalytics	○ Anceta
○ Altosoft	○ Microsoft	○ AthenaHealth
○ Arcplan	○ MicroStrategy	○ Cerner
○ Birne	○ Neudesic	○ eClinical Works
○ Birst	○ NeutrinoBI	○ EPIC
○ Bitam	○ Oracle	○ Explorys
○ Board	○ Panorama	○ GE
○ Clear Story	○ Pentaho	○ Health Care DataWorks
○ Cubeware	○ Phocas	○ Health Catalyst
○ Datameer	○ Platfora	○ McKesson
○ Datawatch (inc. Panopticon)	○ Predixion	○ MedeAnalytics
○ Decisyon	○ Prognoz	○ Medisolv
○ Dimensional Insight	○ Pyramid Analytics	○ Meditech
○ Domo	○ QlikView	○ MedSeek
○ Dundas	○ Quest (Dell)	○ MedVentive
○ Entrinsik	○ Rapid Miner	○ NextGen
○ Exago	○ Roambi (MeLLmo)	○ Optum

○ Good Data	○ Salient	○ Premier
○ Halo BI (IQ4BIS)	○ SAP/Business Objects	○ Siemens
○ IBM/Cognos/SPSS	○ SAS Institute	○ Blackboard
○ IDashboards	○ SiSense	○ Desire2Learn
○ Indicee	○ SpagoBI	○ Ellucian
○ Inetsoft	○ Tableau	○ eThority
○ Infor/Lawson	○ Targit	○ Jenzabar
○ Information Builders (IBI)	○ Tibco/Spotfire	○ Workday
○ Other (please specify)		

12. Please specify product name and version for vendor selected in Q14

13. How long has this product been in use?

○ Less than 1 year	○ 3 - 5 years	○ More than 10 years
○ 1 - 2 years	○ 6 - 10 years	

14. How many users currently use this product?

○ 1-5	○ 21-50	○ 201-500
○ 6-10	○ 51-100	○ 501 - 1,000
○ 11-20	○ 101-200	○ More than 1,000

✱15. How would you characterize the sales/acquisition experience with this vendor:

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Professionalism	○	○	○	○	○	○
Product Knowledge	○	○	○	○	○	○
Understanding our business/needs	○	○	○	○	○	○
Responsiveness	○	○	○	○	○	○
Flexibility/Accommodation	○	○	○	○	○	○
Business Practices	○	○	○	○	○	○
Contractual terms and conditions	○	○	○	○	○	○
Follow up after the sale	○	○	○	○	○	○

Additional Comments

*16. How would you characterize the value for the price paid?

	Great value (Well exceeded expectations)	Good Value (Somewhat exceeded expectations)	Average Value (Met expectations)	Poor Value (Fell short of expectations)	Very Poor Value (Fell far short of expectations)
Value	○	○	○	○	○

*17. How would you characterize the quality and usefulness of the product

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Robustness/sophistication of technology	○	○	○	○	○	○
Completeness of functionality	○	○	○	○	○	○
Reliability of technology	○	○	○	○	○	○
Scalability	○	○	○	○	○	○
Integration of components within product	○	○	○	○	○	○
Integration with 3rd party technologies	○	○	○	○	○	○
Overall Usability	○	○	○	○	○	○
Ease of Installation	○	○	○	○	○	○
Ease of administration	○	○	○	○	○	○
Customization and Extensibility	○	○	○	○	○	○
Ease of upgrade/migration to new versions	○	○	○	○	○	○
Online training, forums and documentation	○	○	○	○	○	○

Other comments

*18. How would you characterize the vendor's technical support

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Professionalism	○	○	○	○	○	○
Product Knowledge	○	○	○	○	○	○
Responsiveness	○	○	○	○	○	○
Continuity of personnel	○	○	○	○	○	○
Time to resolve problems	○	○	○	○	○	○

Other (please specify)

✱19. How would you characterize the vendor's consulting services

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Professionalism	○	○	○	○	○	○
Product Knowledge	○	○	○	○	○	○
Experience	○	○	○	○	○	○
Continuity	○	○	○	○	○	○
Value	○	○	○	○	○	○

Other comments:

✱20. How would you rate the "integrity" (i.e., truthfulness, honesty) of this BI vendor?

	Excellent	Very Good	Average	Poor	Very Poor	N/A
Integrity	○	○	○	○	○	○

21. Did this vendor's overall performance improve, remains the same or decline from last year?

○ Improved

○ Stayed the same

○ Declined

✱22. Recommendation of vendor, product and services

	I would recommend this vendor/product	I would NOT recommend this vendor/product
Would you recommend this vendor/product?	○	○

Any additional comments:

✱23.

Do you wish to provide ratings for a second vendor?

○ YES

○ NO