May 20, 2013
Dresner Advisory Services, LLC

2013 Edition

Wisdom of Crowds ®
Business Intelligence Market Study

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Disclaimer:

This report should be used for informational purposes only. Vendor and product selections should be made based on multiple information sources, face-to-face meetings, customer reference checking, product demonstrations and proof-of-concept applications.

The information contained in all Wisdom of Crowds ® Market Study Reports reflects the opinions expressed in the online responses of individuals who chose to respond to our online questionnaire, and does not represent a scientific sampling of any kind. Dresner Advisory Services, LLC shall not be liable for the content of Reports, study results, or for any damages incurred or alleged to be incurred by any of the companies included in the Reports as a result of its content.

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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 (on-line 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 sixth 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 (BI) Intelligence market. We hope that you agree that we have not only succeeded in doing so, but have continued to "raise the bar" - offering increasingly compelling research and greater value with each successive year!

We published our first Wisdom of Crowds ® Business Intelligence Market Study in 2010. At that time our primary goal was to reach out to Business Intelligence users with a focus upon evaluating BI vendors and products. Our first research report was 68 pages in length, with 47 charts, and ranking 15 vendors. We have continued to publish the Wisdom of Crowds BI Market Study each year since - expanding its scope and staying true to our goal of providing fresh perspective. Last year's study was 94 pages with 65 charts and 6 tables.

In 2010 we published our first thematic research study - Mobile Business Intelligence. Since then, we have published three more - expanding to include the broader Mobile Computing topic.

Last year we received the registered trademark designation for "Wisdom of Crowds ®". Moving forward, all research will be published under this brand. We also added two new thematic research reports to the family: Cloud BI and Collaborative BI.

For this year we have expanded the flagship Wisdom of Crowds ® Business Intelligence Market Study once again, adding significant new sections - including enhanced user trending and technology sections. We have also gone from rating 15 vendors in 2010 and four segments to 23 vendors and five segments!

We will continue to publish new versions of last year's thematic research report: Cloud BI, Collaborative BI and Mobile Computing/BI. And, in an effort to continue to address an increasingly dynamic and changing market we will add a new report for 2013 – Embedded Business Intelligence. Like our other thematic research reports, Embedded BI will explore user perceptions and intentions and will include vendor rankings and a buyers' guide.

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.

A Consumer Guide:

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

Using our trademark 33-dimension 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

A 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 globe 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 course of the past two decades and is an expert in analyzing these markets.

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

- The Wisdom of Crowds ® Business Intelligence Market Study

- The Wisdom of Crowds ® Collaborative Business Intelligence Market Study

- The Wisdom of Crowds ® Cloud Business Intelligence Market Study

- The Wisdom of Crowds ® Mobile Business Intelligence Market Study.

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

More information about Dresner Advisory Services can be found at www.dresneradvisory.com.

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

The volume of data collected continues to expand each year. For 2013, we collected 1,182 completed surveys – exceeding our goal of 1,100 with 40% growth over 2012 (Figure 1).
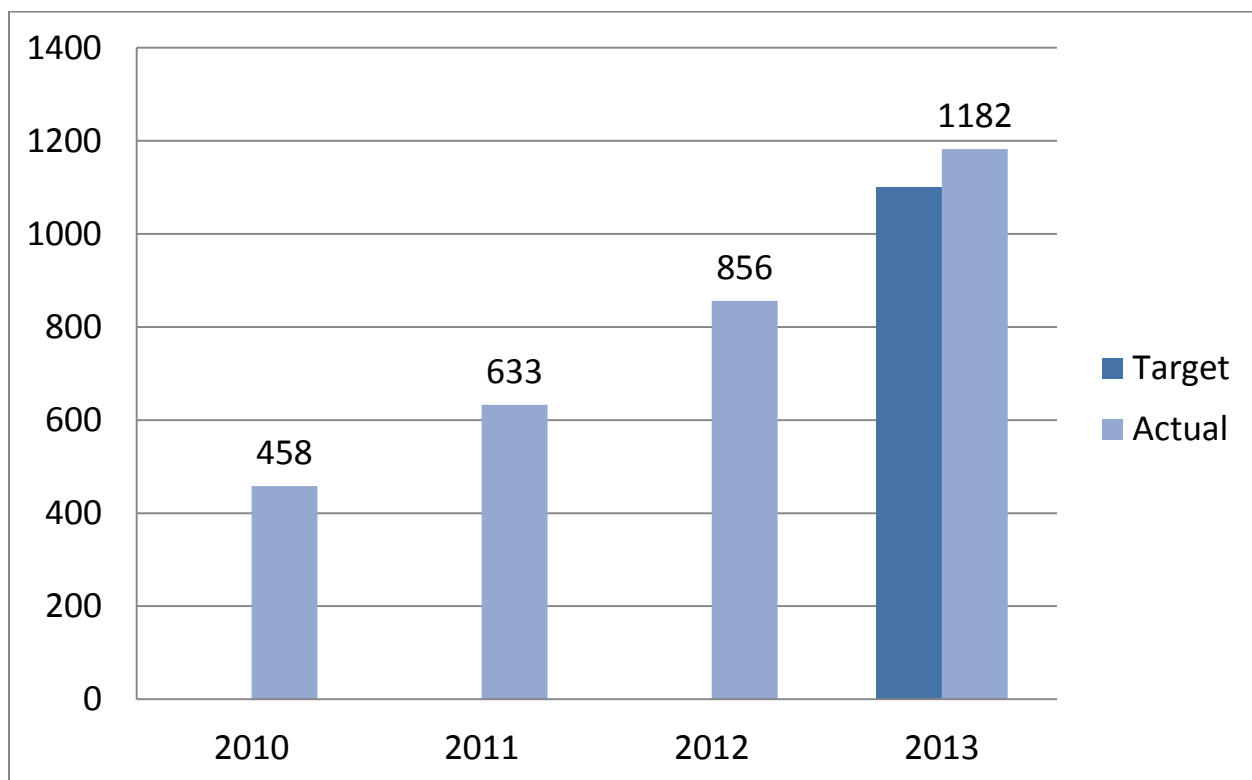

Figure 1 - Numbers of survey respondents 2010 - 2013

Data Quality:

All respondent entries were carefully scrutinized and verified to ensure that only qualified participants are included in the study.

New for 2013:

Building upon our success and momentum since 2010, we have expanded the 2013 study to address a wide range of technology and usage issues, offering more actionable insight for users and suppliers of Business Intelligence solutions:

- Our technology section has been enlarged (19 areas versus 16 in 2012) testing perceptions and intentions concerning: Search BI, Embedded BI and Data Discovery.

- For 2013 we have further developed our user trending section. In 2012 respondents were asked if their Business Intelligence initiatives have been successful. For 2013, we have added questions surrounding functions – those which drive Business Intelligence initiatives and those targeted for deployment. In addition, we have asked about aspirations/objectives for Business Intelligence and overall user penetration for Business Intelligence solutions.

- We added two new market segments for 2013: "Specialized" and "Early Stage" to the existing four market segments and have ranked 23 vendors versus 17 vendors in 2012.

- Wherever possible, we have included year-over-year comparisons and future projections to provide greater understanding and perspective.

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 2012, these include the "Titans", "Established Pure-Play", "High Growth" and "Emerging" vendors. For 2013, we added "Specialized" and "Early Stage" as new fifth and sixth categories.

Titans 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: IBM/Cognos, Microsoft, Oracle and SAP/BusinessObjects. Infor has been added to this category as a new entry for 2013.

Large Established Pure-Play BI vendors are predominately focused upon Business Intelligence software and services and have typically been in business for 15 or more years - with well-established customer bases and revenue streams. Several are publicly held concerns. These include Actuate, Information Builders, MicroStrategy and SAS Institute. For 2013, QlikTech has been moved to this category from High Growth.

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 -- and new entries: Dundas, Panopticon, and Phocus.

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 2013, vendors include: Tableau, Tibco Spotfire, Pentaho (moved from Emerging) and LogiAnalytics (new for 2013).

Emerging BI vendors are typically younger than other categories and offer unique and often innovative business models, technologies and/or services. This category includes: Jaspersoft, Jedox, and Yellowfin – with new entries: Birst and iDashboards.

Early Stage vendors are among youngest and/or smallest BI software companies – with limited revenues and customers, offering "concierge" style service. Vendors in this "segment" are not ranked, but are given "honorable mention".

Executive Summary

Executive Summary:

- Executive Management is both the chief driver behind Business Intelligence initiatives and the primary consumer/beneficiary. IT, Strategic Planning and BI Competency functions play an increasing role with size of company.

- "Better decision making" is the most popular objective for Business Intelligence solutions, across all market sectors. "Improved operational efficiency" was the second most common objective.

- User penetration of Business Intelligence solutions remains modest, with 36% of respondents reporting less than 10% of users with access to BI today. North America leads with the highest penetration worldwide, with one-third reporting greater than 40% user penetration.

- Perceived success remained largely unchanged over 2012, with a majority of respondents reporting some measure of success with Business Intelligence. Those reporting greater success were likely to have more ambitious deployment plans and fewer redundant tools.

- Success with Business Intelligence has more to do with management support and ownership, organizational stability, a focus upon critical opportunities and requisite skills - than technology. Although, once those elements are in place, excellent technology is an important enabler.

- Top technology priorities related to BI for 2013 include: Dashboards, End user "self service", Advanced visualization and Data Warehousing. The only ones to increase in priority over 2012 were Cloud BI, Dashboards and Mobile BI.

- Smaller organizations were more likely to place a priority upon Mobile BI and Cloud BI, while large organizations favored Data Warehousing and Data Mining.

- From an industry perspective respondents gave vendors higher overall scores for all categories of measurement, including: Sales, Value, Product, Technical support, Consulting, Integrity and Recommended.

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. Cross-tab analyses have been constructed using these demographics to identify and illustrate important industry trends.

Geography:

As in previous years, we've been able to attract survey respondents from a wide array of geographies – including 25% from EMEA (35 countries) and 11% from APAC (15 countries). Although North America represents the largest group, it is in itself diverse – representing five Canadian provinces, 43 US states and the Commonwealth of Puerto Rico (Figure 2).
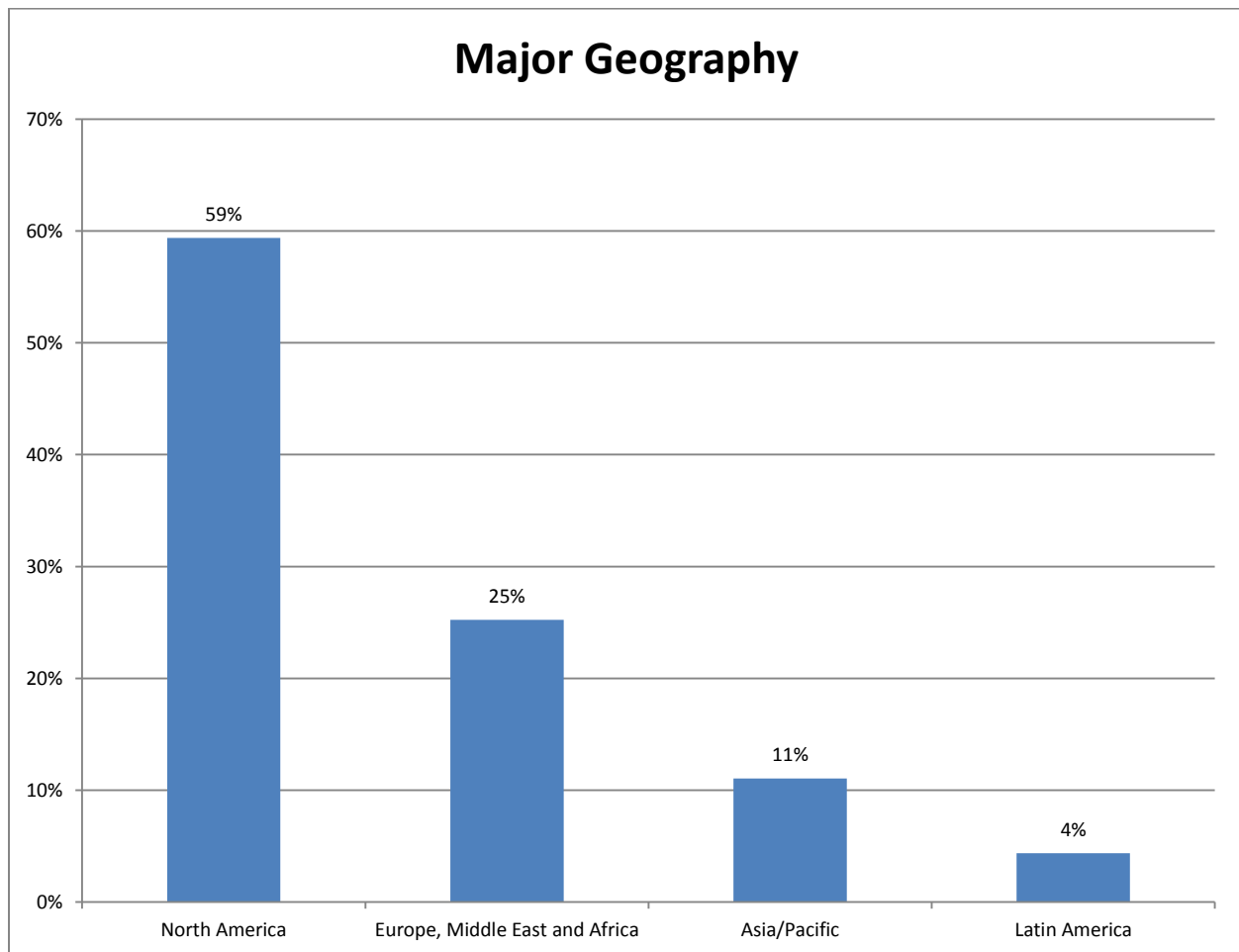

Figure 2 - Geographic Distribution

Functions:

For 2013, we expanded the functions that we track – adding the BI Competency Center (BICC) and splitting Sales and Marketing into their respective functions. While the IT Department represents the largest single group of respondents, representing 35% of the sample, executive management (18%) and the BICC (17%) are well represented (Figure 3).

This distribution across functions has enabled us to develop analyses comparing and contrasting the plans and priorities of the different departments within organizations.
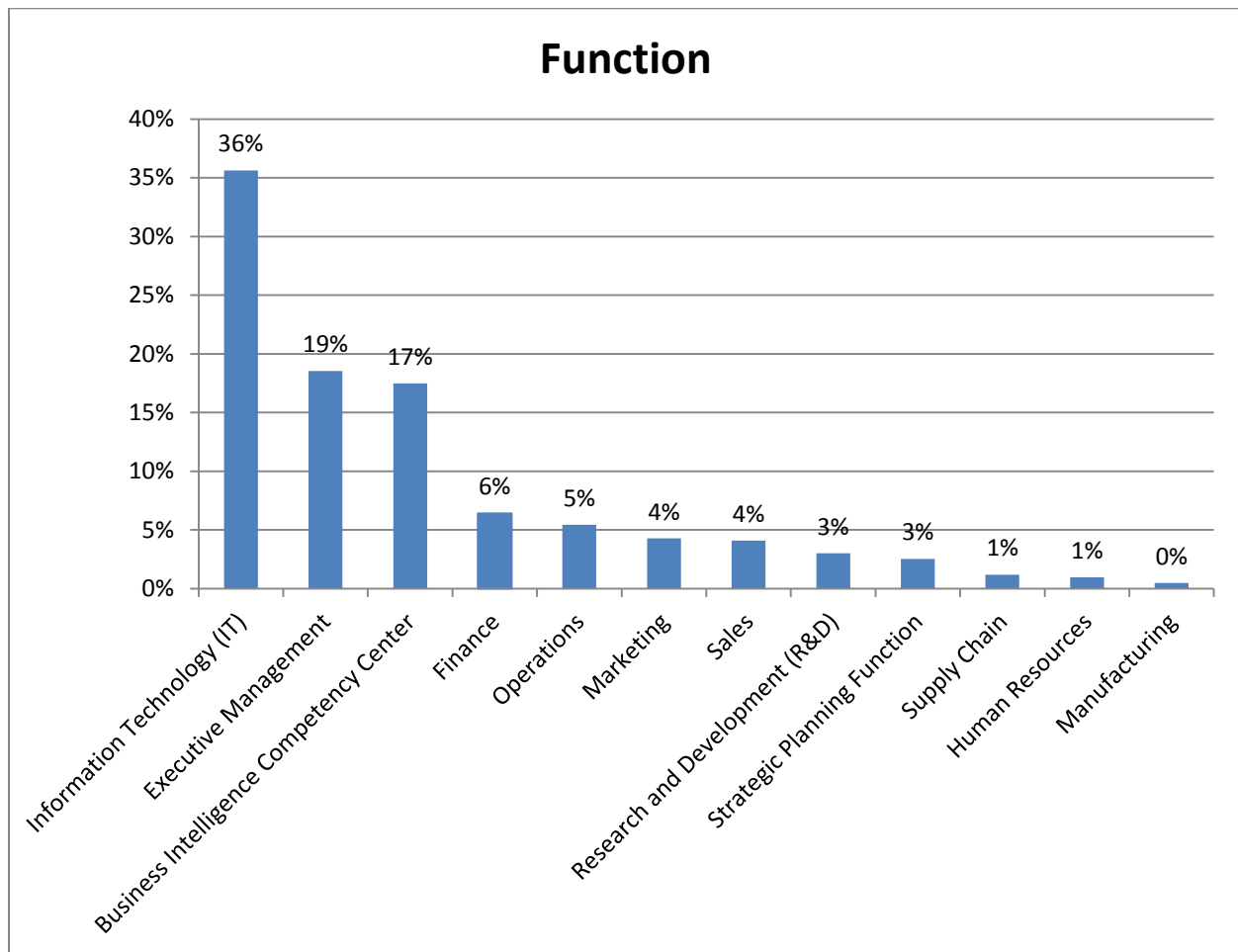

Figure 3 - Functions Represented

Vertical Industries:

For 2013, vertical industry distribution was similar to 2012– with solid participation from Technology, Consulting, Financial Services, Health Care, and Manufacturing. We encourage the participation of consultants – who oftentimes have deeper industry knowledge than their customer counterparts. This also yields insight into the partner ecosystem for BI vendors (Figure 4).
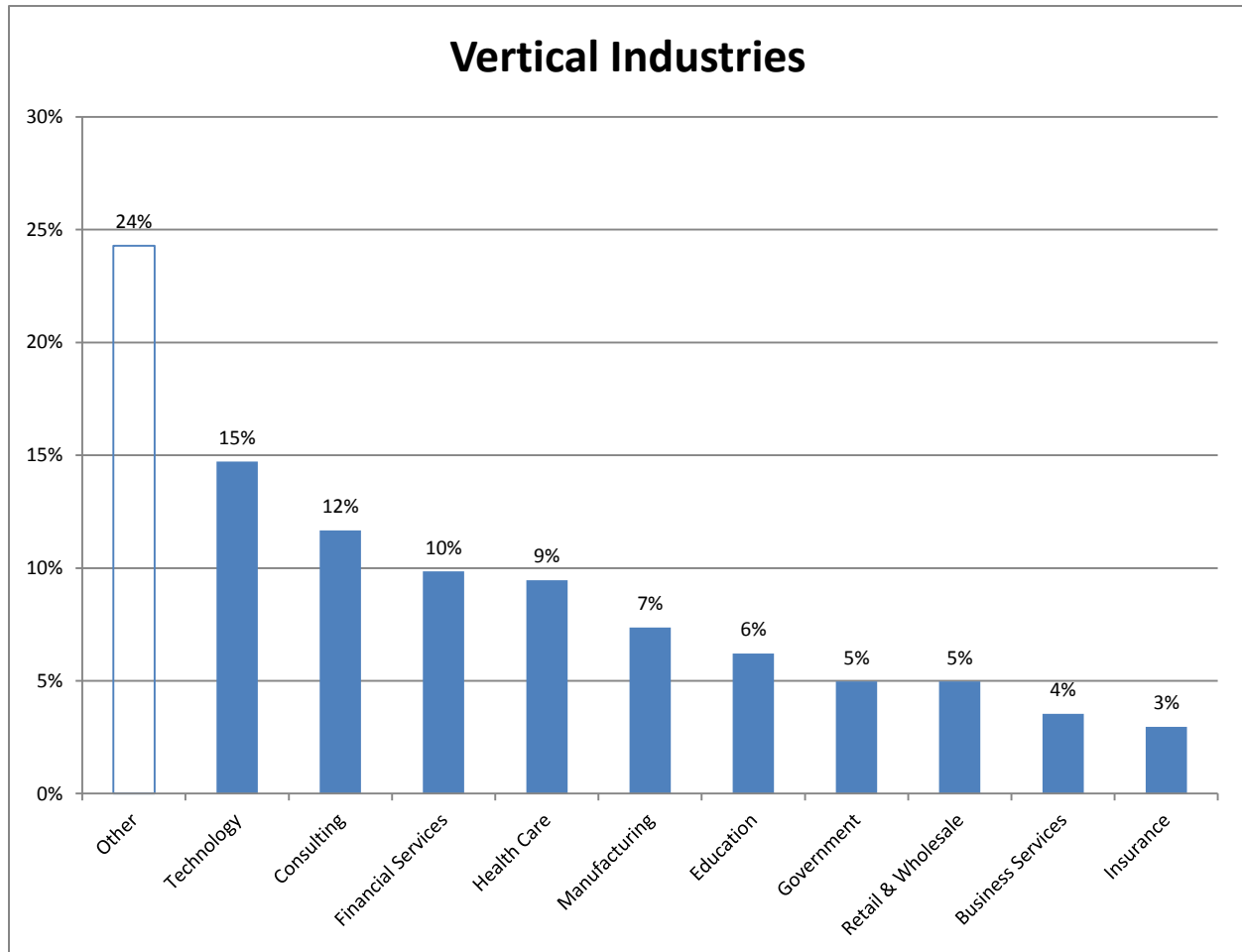
Vertical Industries

Industry	Percentage
Other	24%
Technology	15%
Consulting	12%
Financial Services	10%
Health Care	9%
Manufacturing	7%
Education	6%
Government	5%
Retail & Wholesale	5%
Business Services	4%
Insurance	3%

Figure 4 - Vertical Industries

Organization Size:

We saw strong participation from a balanced mix of small, medium and large organizations (Figure 5). Similar to 2012, this year the largest of organizations represented 24% of the sample, mid-sized organizations 45% and the smallest of organizations 31%. As with previous years, we have found important differences by organization size.
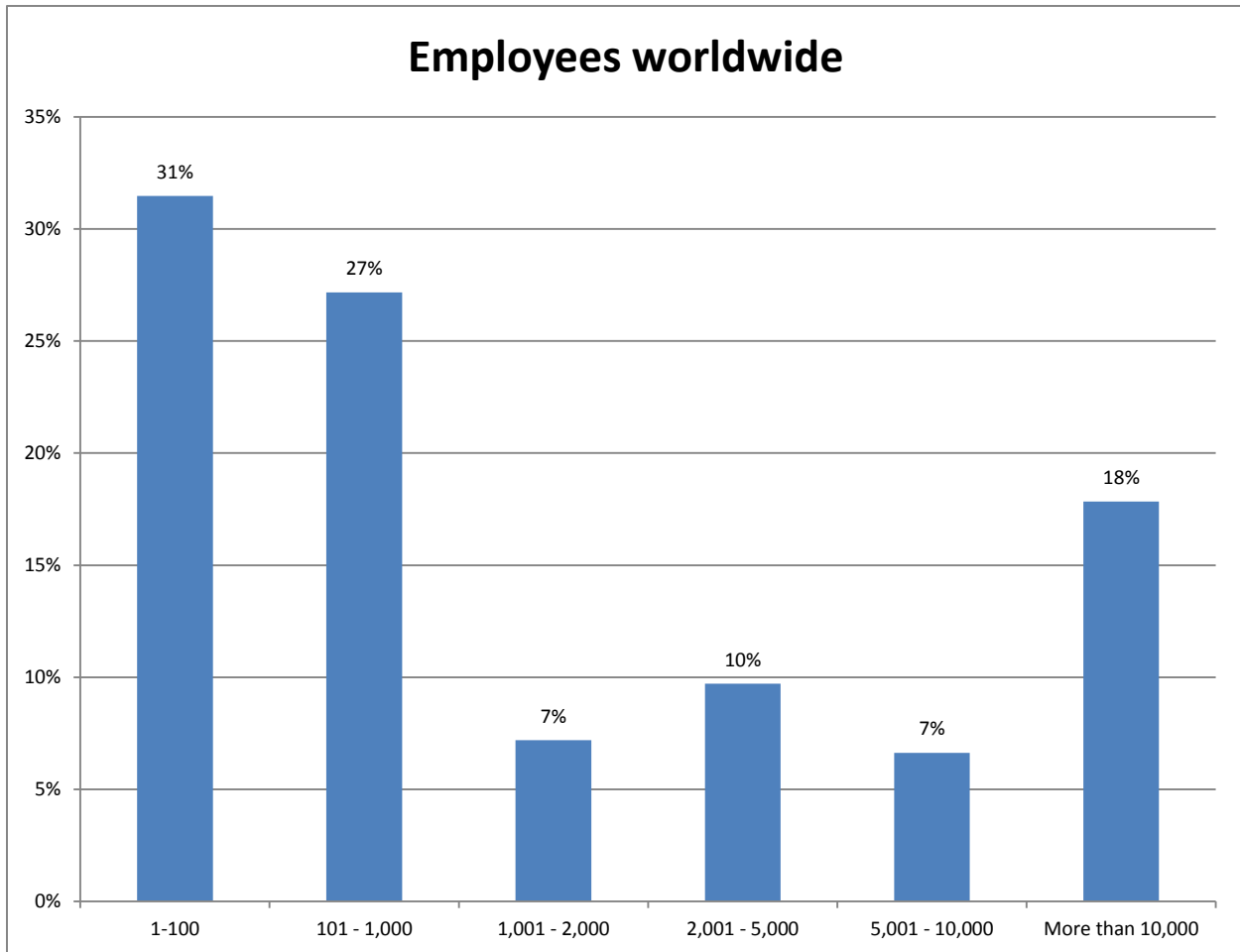

Figure 5 - Size of Organization

Analysis & Trends

Analysis & Trends

For 2013 we have expanded our research objectives substantially. This is particularly evident in the area of user trending. We have collected and analyzed data surrounding functions which are driving Business Intelligence, goals/objectives for BI, targeted user roles, current penetration and future plans for Business Intelligence deployment and organizational success with BI. Using this as an order or flow for the research, we believe it tells a more coherent story: clear drivers, objectives, and targets lead to increased penetration and (ideally) success with Business Intelligence.

Departments/Functions Driving Business Intelligence

New this year, we explore which functions are driving Business Intelligence initiatives within the organization. For each function, we asked respondents to specify whether it drives business intelligence "always", "often", "sometimes", "rarely" or "never". We used this to create a weighted average on a 5.0 scale. In the lead, Executive Management and Finance are most likely to drive BI, with Human Resources and Manufacturing functions among the least likely (Figure 6).
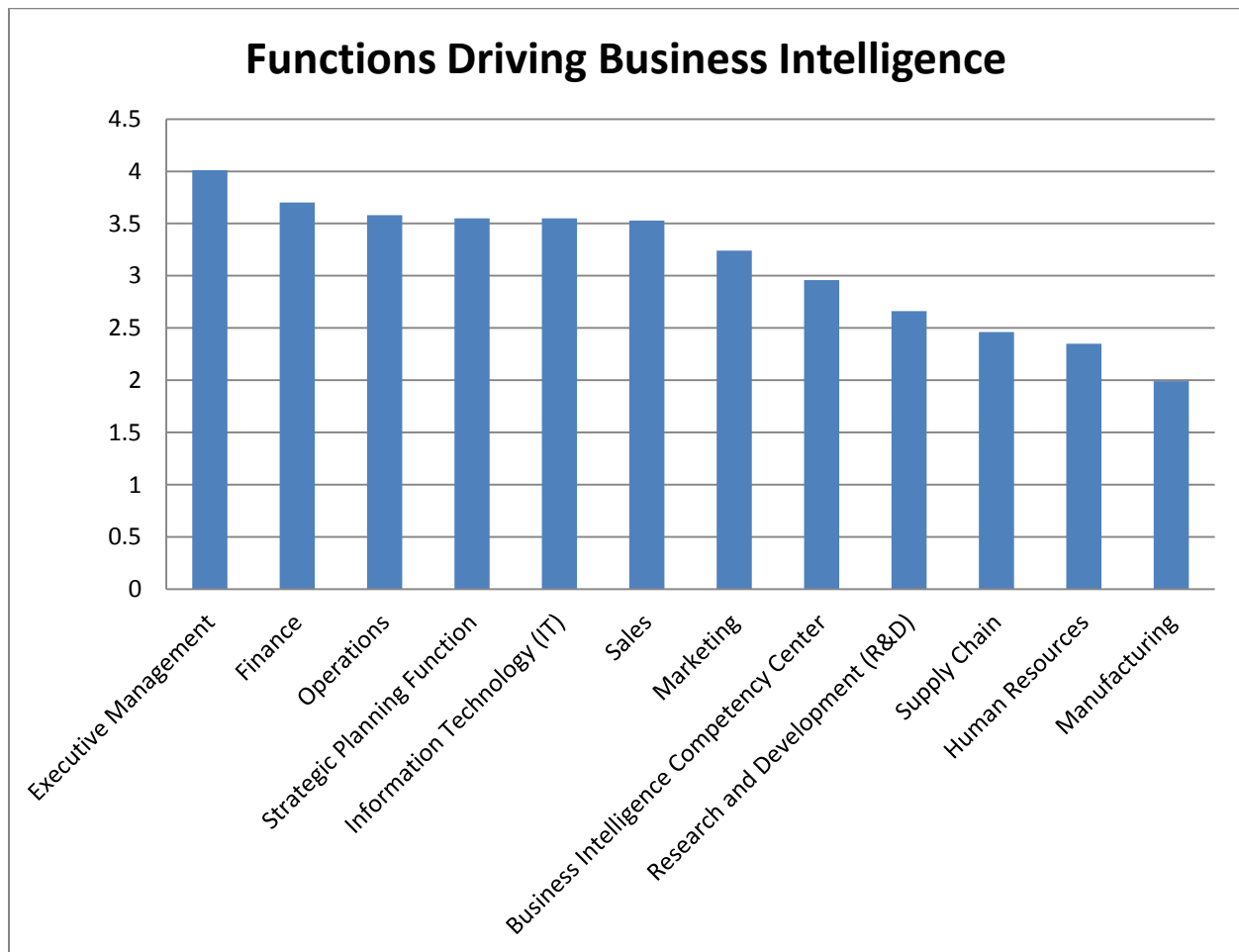
Figure 6 – Functions Driving Business Intelligence (Weighted Mean)

Departmental Drivers by Organization Size

When looking at this from the perspective of organization size, Executive Management plays the strongest role – across the board. However, the importance and influence of other functions varies by size. For example the importance of IT and BI Competency Center functions increases with size of organization while that of Sales decreases (Figure 7).
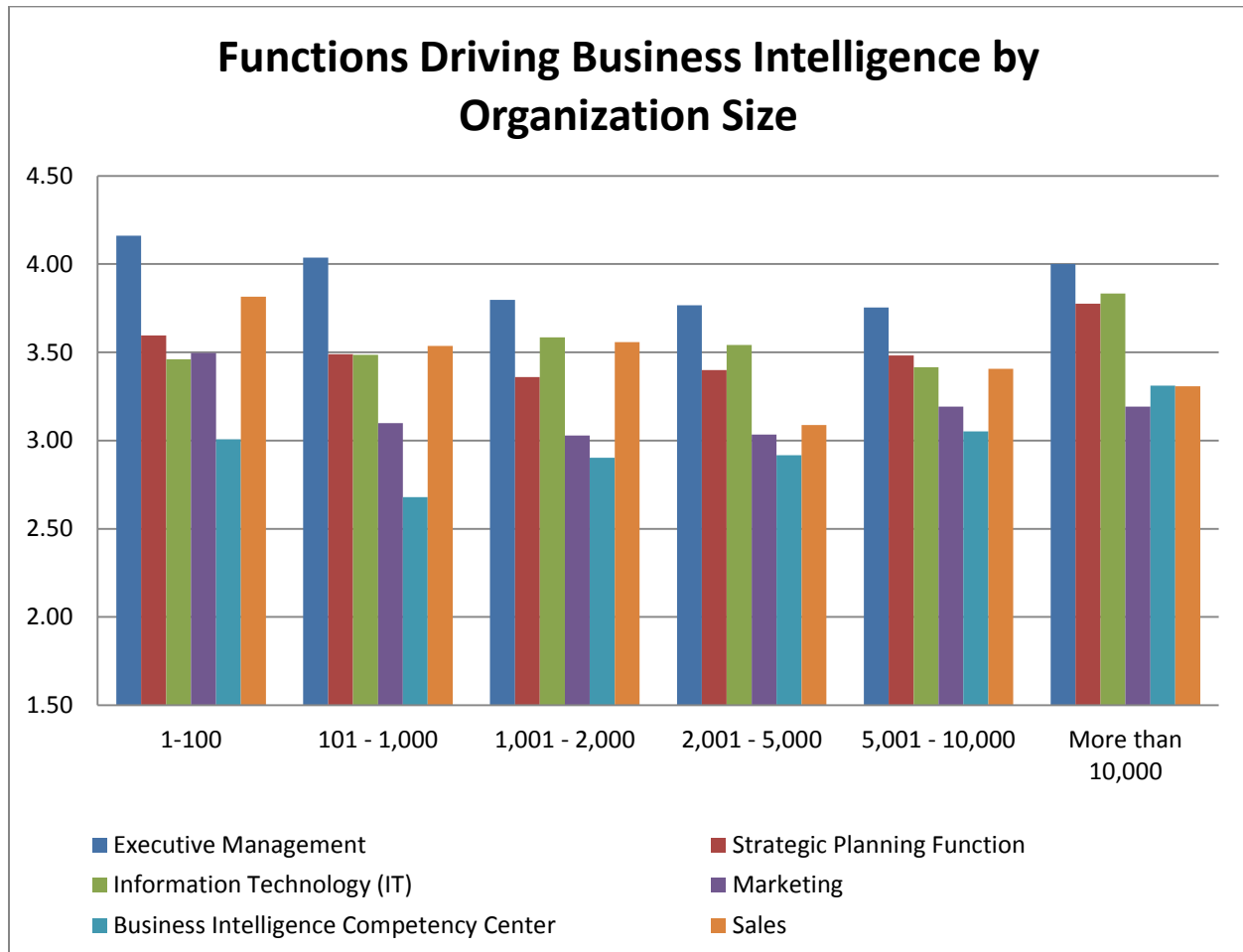

Figure 7 - Functions Driving Business Intelligence by Organization Size (Weighted Mean)

Departmental Drivers by Major Geography

Some differences can be found by geography (Figure 8). Although Executive Management is dominant as a driver across all geographies, outside of North America, the Sales, Finance, BI Competency Center and Manufacturing functions were more likely to drive BI. In contrast, the IT function appears to have a greater impact in North America than in EMEA or APAC.
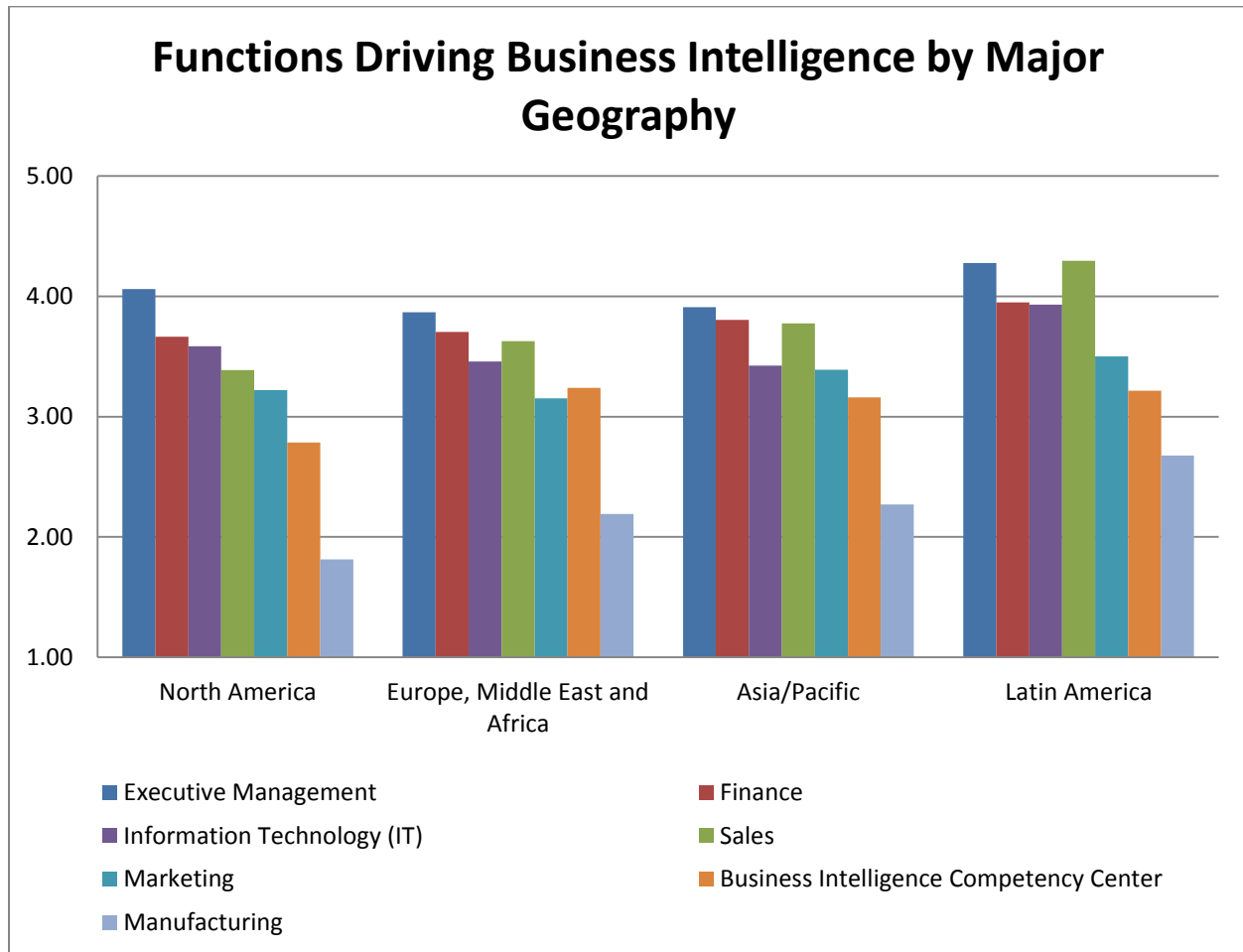
Figure 8 - Functions Driving Business Intelligence by Major Geography (Weighted Mean)

Departmental Drivers by Selected Industries

Executive Management is the driving force for BI across virtually all industries – with the exception of Government, where the Strategic Planning function is stronger (Figure 9). Although prominent in Financial Services, the BI Competency Center is less of a driver in other key industries. And, the Sales function – a strong driver in Healthcare, Insurance and Financial Services – is less so in Manufacturing and Retail.
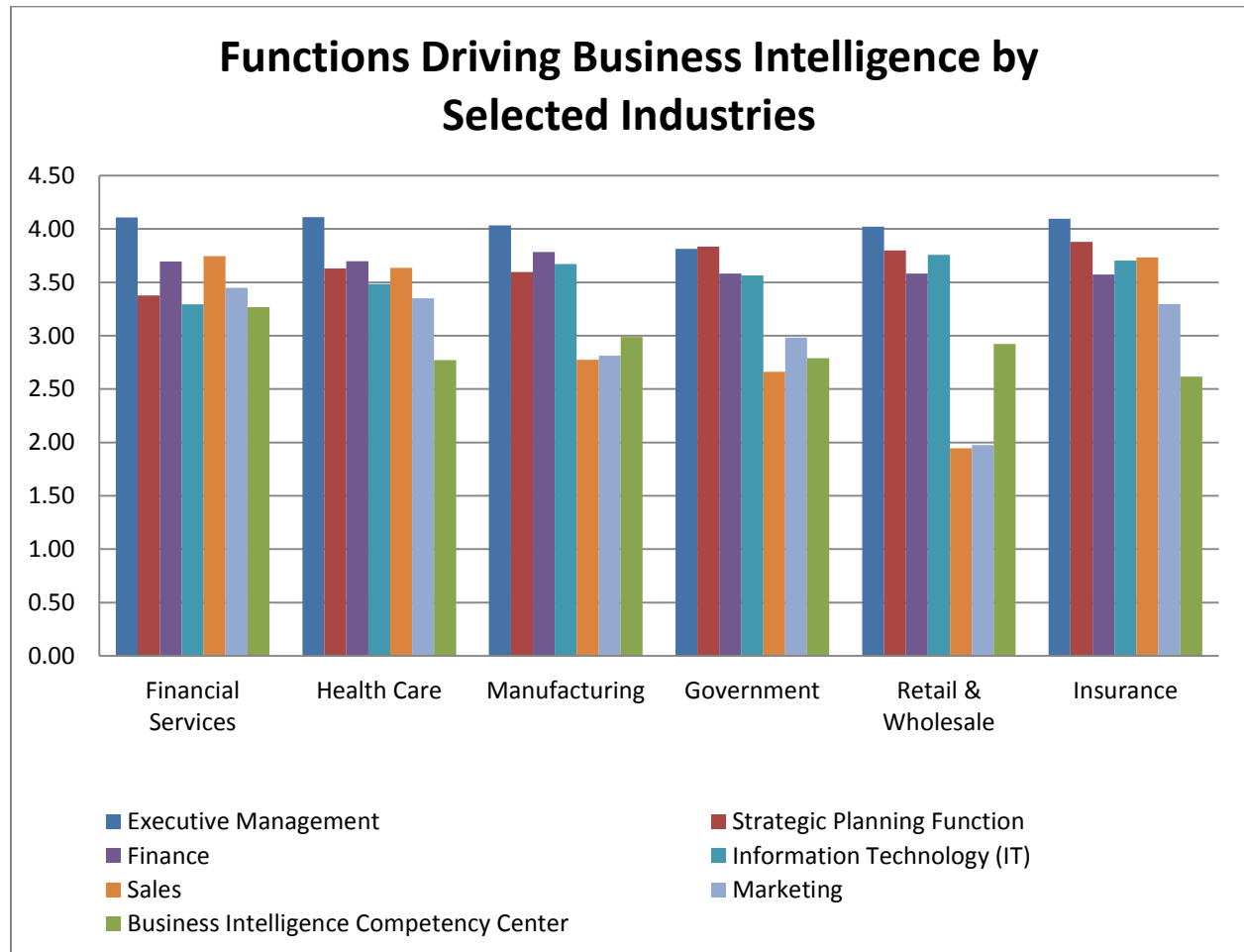

Figure 9 - Functions Driving Business Intelligence by Selected Industries (Weighted Mean)

User Roles Targeted for Business Intelligence:

This year we asked which functions/roles are being targeted for automation with Business Intelligence solutions. Respondents were able to designate roles as either "Primary", "Secondary" or "Not Applicable". What we found was not surprising: the majority prioritized them as follows: executives, middle managers, line managers, individuals, customer and then suppliers last (Figure 10).
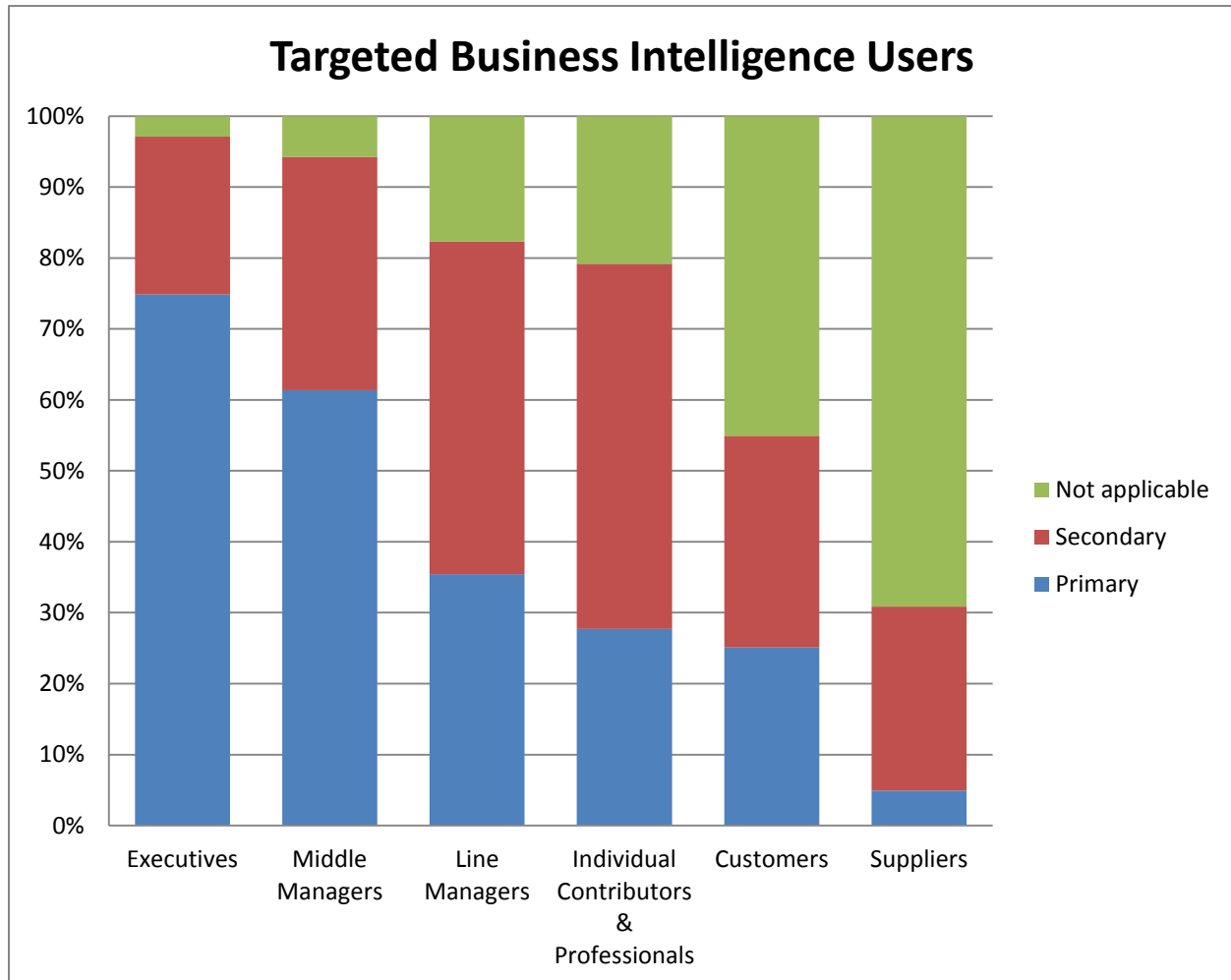

Figure 10 – Targeted Business Intelligence Users

Targeted Users by Geography

Using a weighted average approach (e.g., Primary=3, Secondary=2), we calculated the importance of automating roles by geography (Figure 11). In general, Executives and Middle Managers were a top priority for BI across all geographies. Although the differences are slight in nature, Line Managers hold greater importance in EMEA and Latin America while Individual Contributors and Customers are a higher priority in North America.
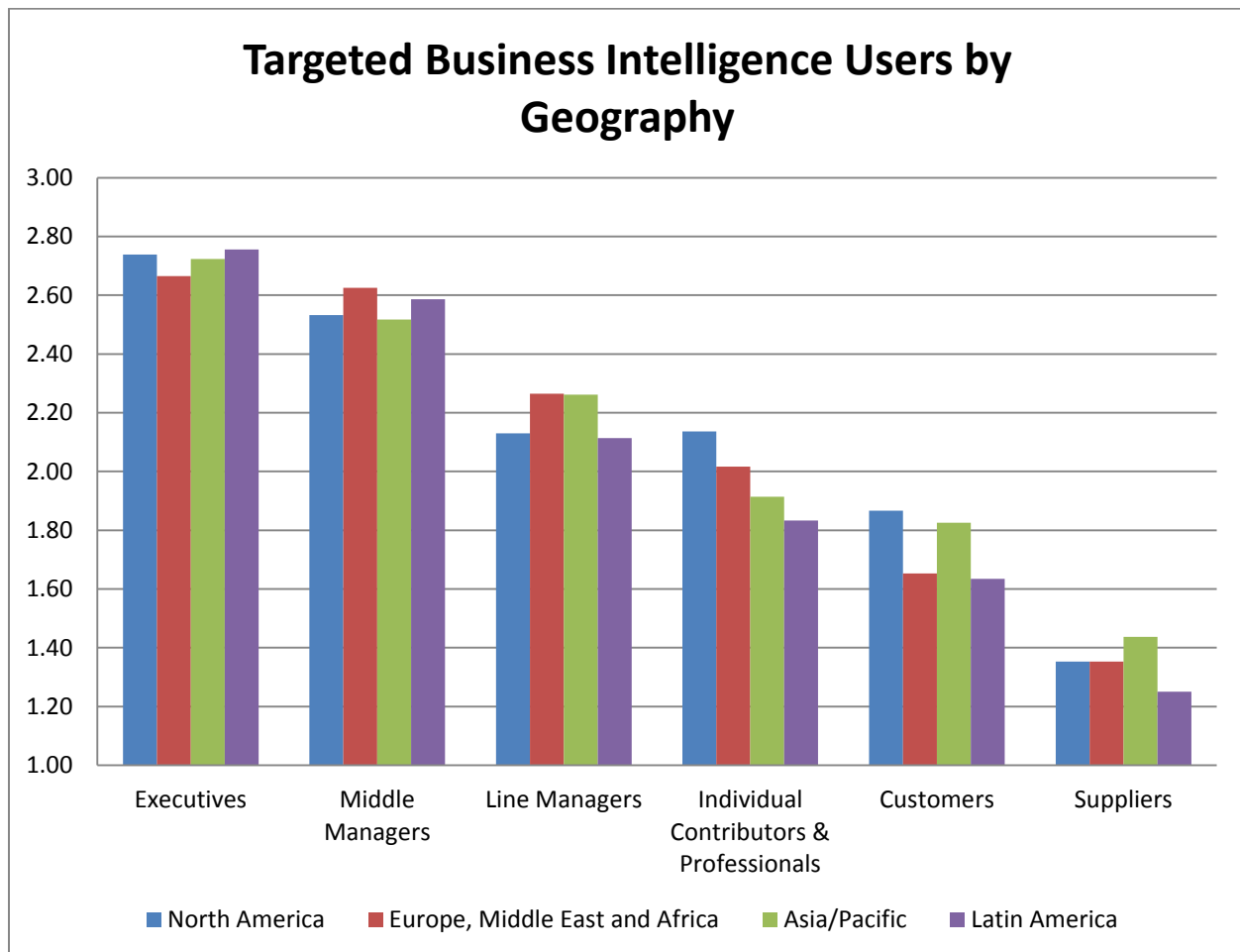
Figure 11 - Targeted Business Intelligence Users by Geography (Weighted Mean)

Targeted Users by Organization Size

When examining this trend by size of organization, we see somewhat different priorities (Figure 12). Although executives are the top priority in small and large organizations, mid-sized companies indicated a higher priority for middle management. A large span of control and oftentimes operational responsibility likely contribute to this phenomenon. The importance of line management and individual contributors took on increased importance in direct relation to the size of the organization.
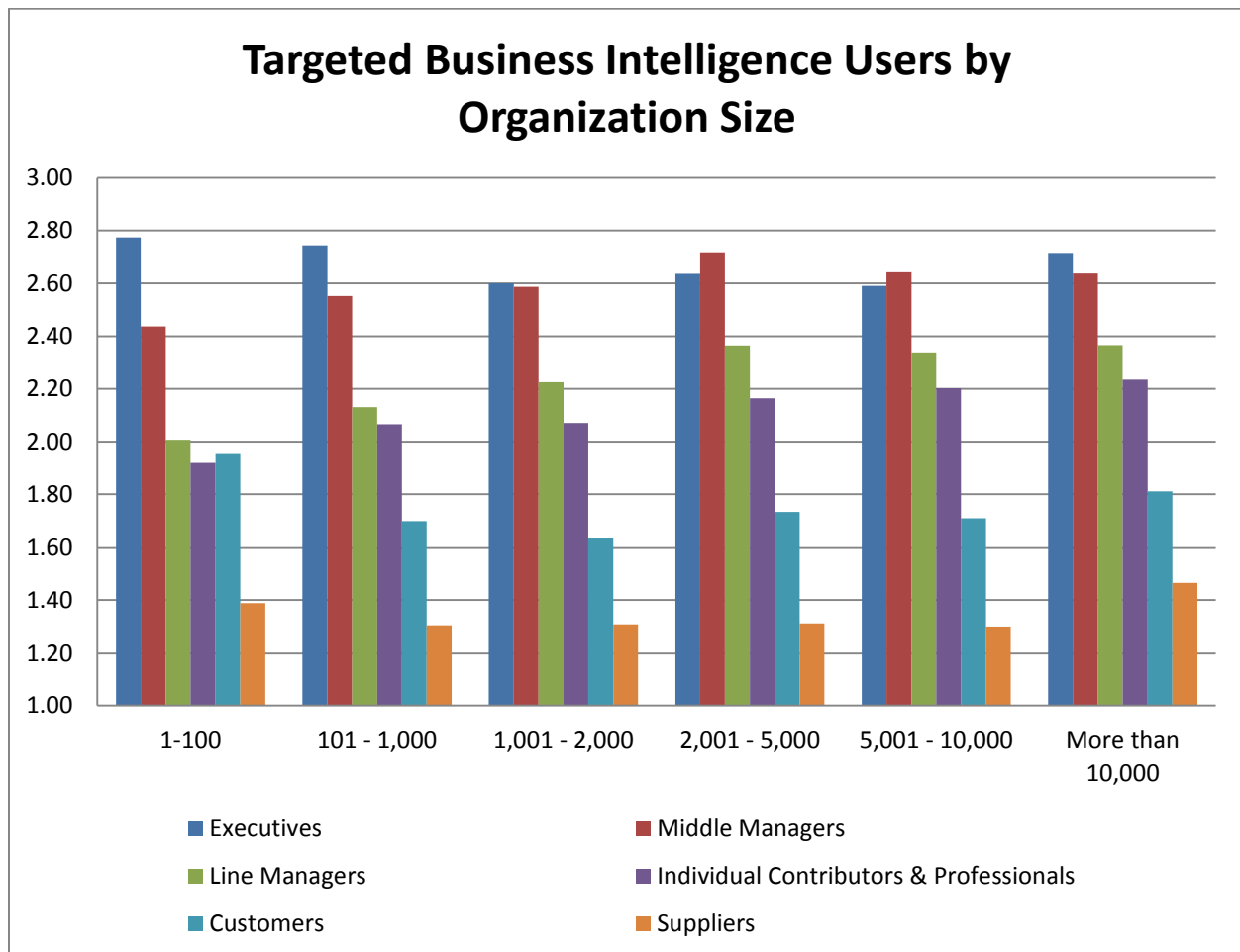
Figure 12 - Targeted Business Intelligence Users by Organization Size (Weighted Mean)

Targeted Users by Industry

Across most vertical industries, the priority for Business Intelligence follows the management hierarchy from the highest priority: senior management to the lowest: customers and suppliers (Figure 13). However, there are several notable differences. For example: in Healthcare, Individual Contributors are an above average priority – reflecting initiatives to improve outcomes by enhancing decision making by care-givers. Likewise, in Retail & Wholesale Line Management is a higher priority as decision making increasingly occurs at the store manager level. And, Insurance places a higher than average priority upon Customers.
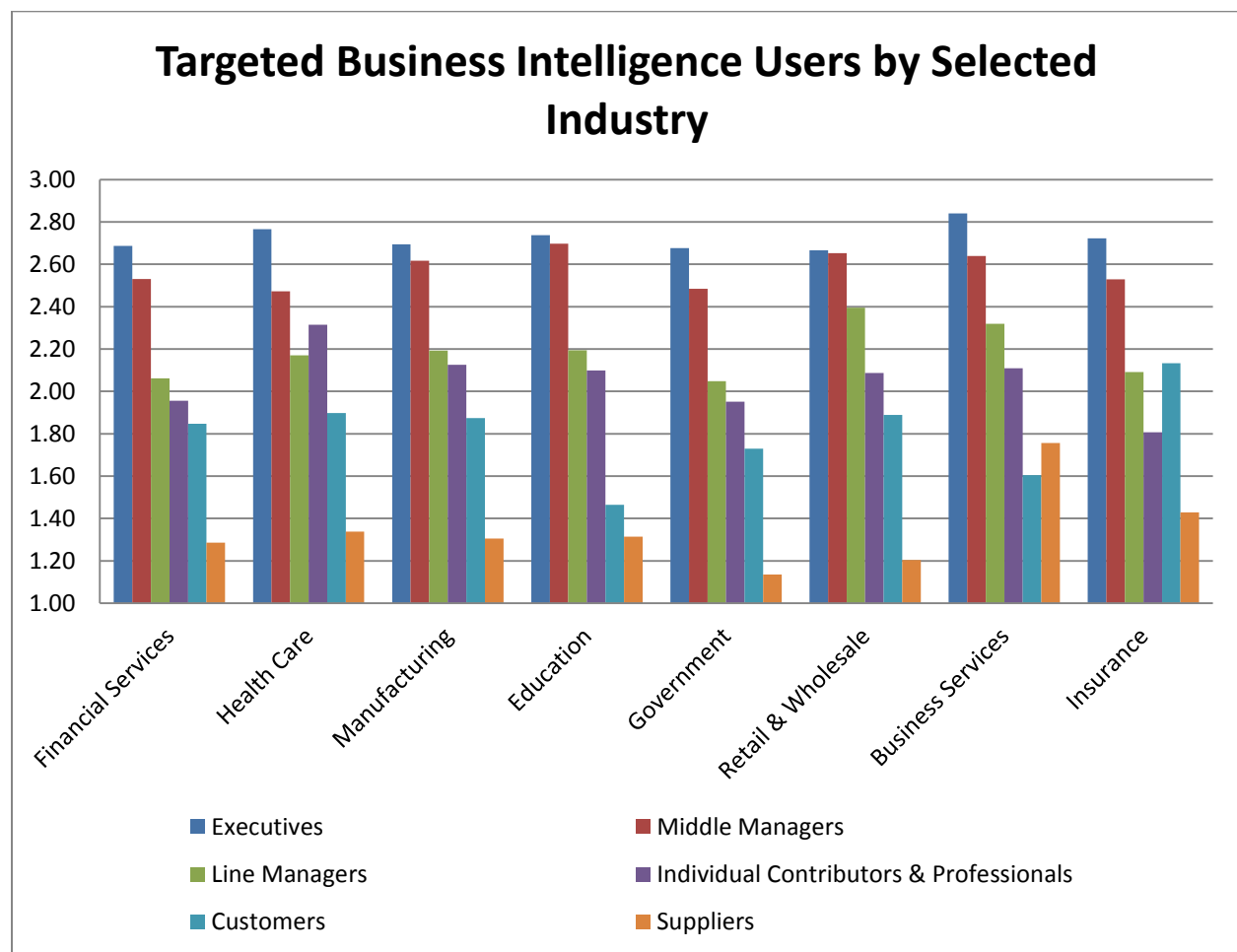
Figure 13 - Targeted Business Intelligence Users by Selected Industry (Weighted Mean)

Objectives for Business Intelligence:

Anecdotally, the goal of "making better decisions" has been at the forefront of Business Intelligence for a number of years. In our research we can see that this is still the case – with the greatest majority indicating that "better decision making" is "critical" (Figure 14). The second highest objective for BI is "improved operational efficiency" and the lowest priority objective is "enhanced customer service".
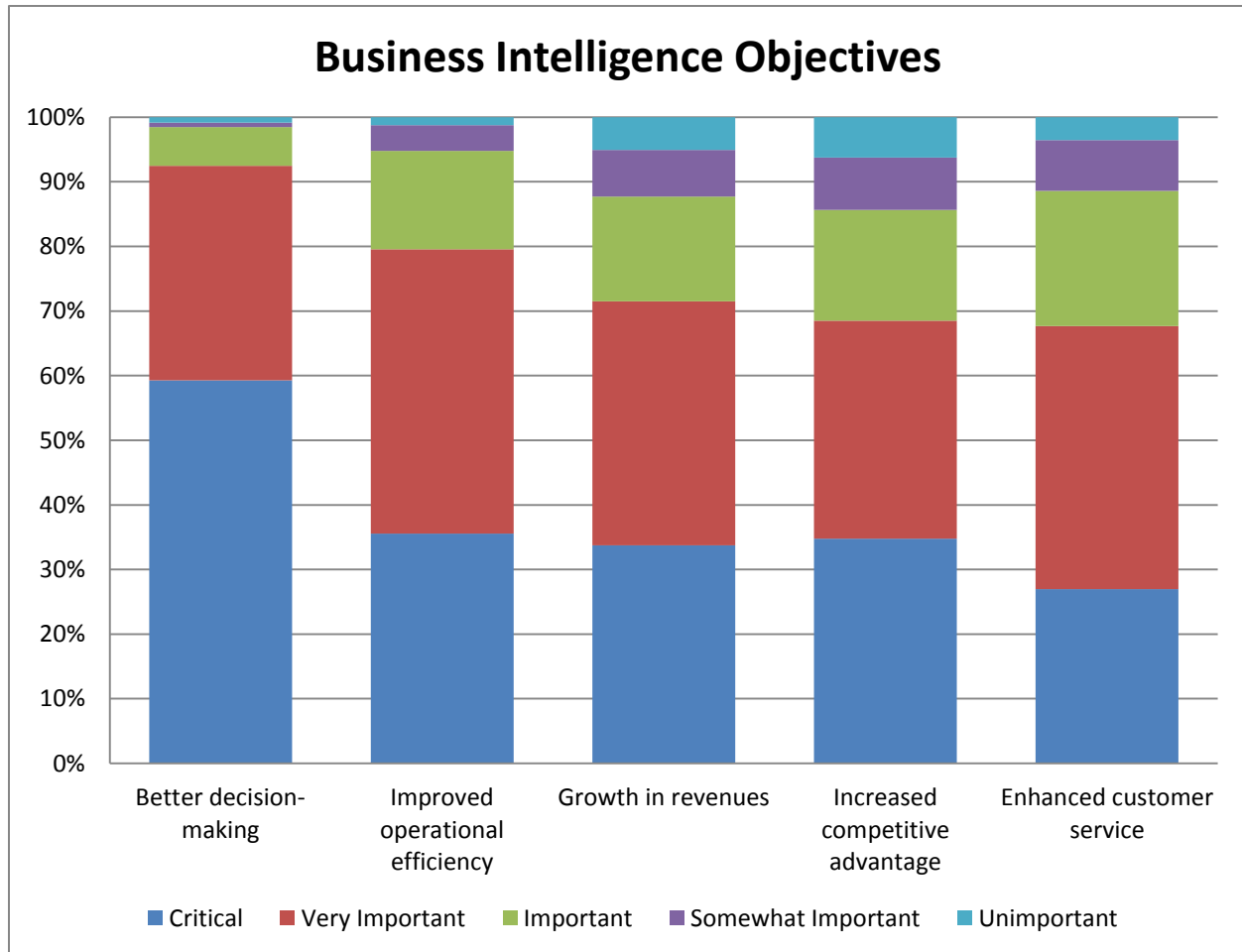

Figure 14 - Business Intelligence Objectives

Business Intelligence Objectives by Organization Size

Although "better decision making" dominates as the highest priority objective, there are some differences by size of organization. For example, the desire for "improved operational efficiency" increases in direct relationship to organization size (Figure 15). In contrast, there is an inverse relationship between organization size and the priority for "increased competitive advantage" and "growth in revenues".
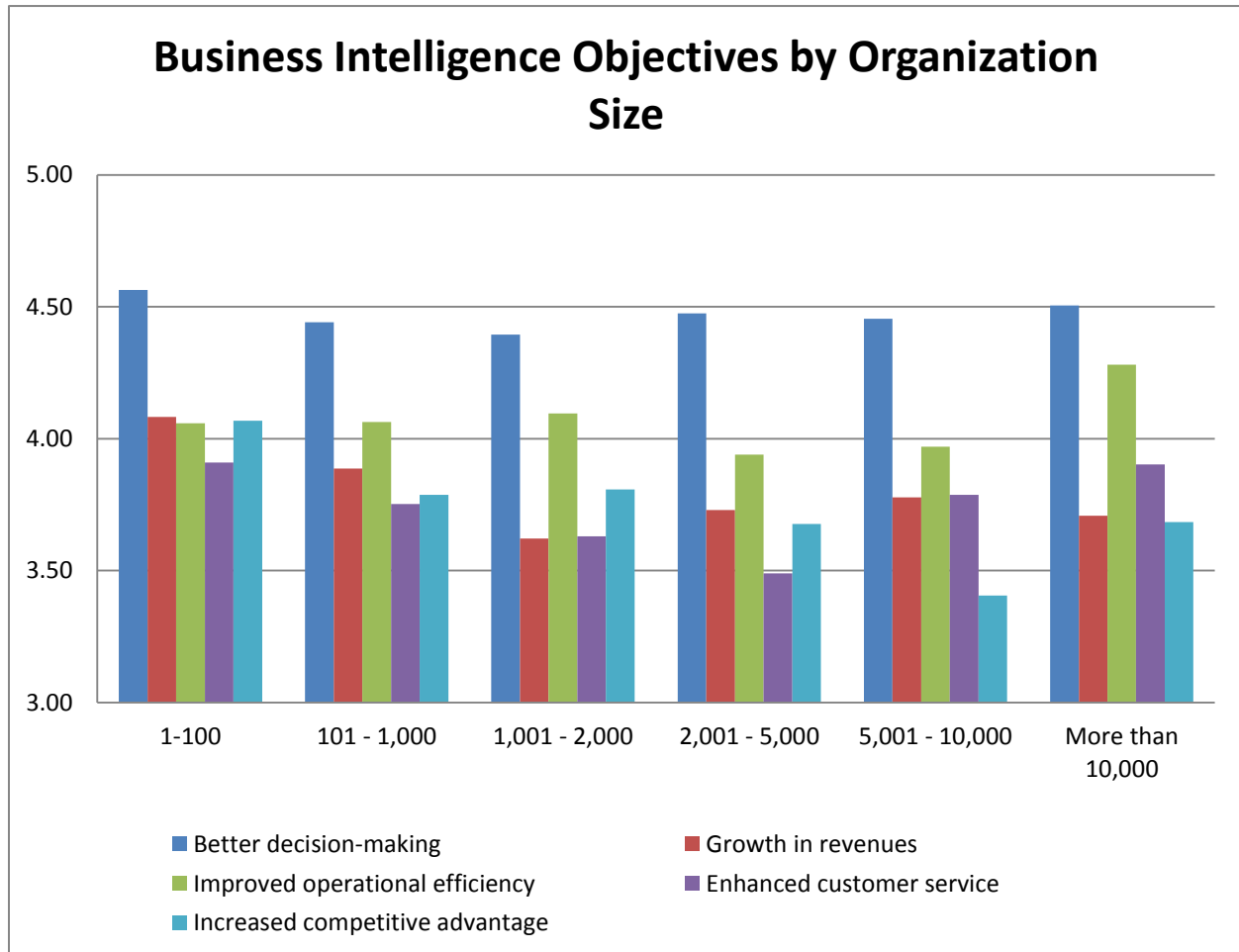
Figure 15 - Business Intelligence Objectives by Organization Size (Weighted Mean)

Business Intelligence Objectives by Geography

Geographically, "better decision making" remains paramount. However, more mature region respondents (North America, EMEA) placed a higher priority upon the tactical "improved operational efficiency" versus more strategic objectives. In contrast, emerging regions (Latin America, APAC) place a somewhat higher priority upon "growth in revenues" (Figure 16).
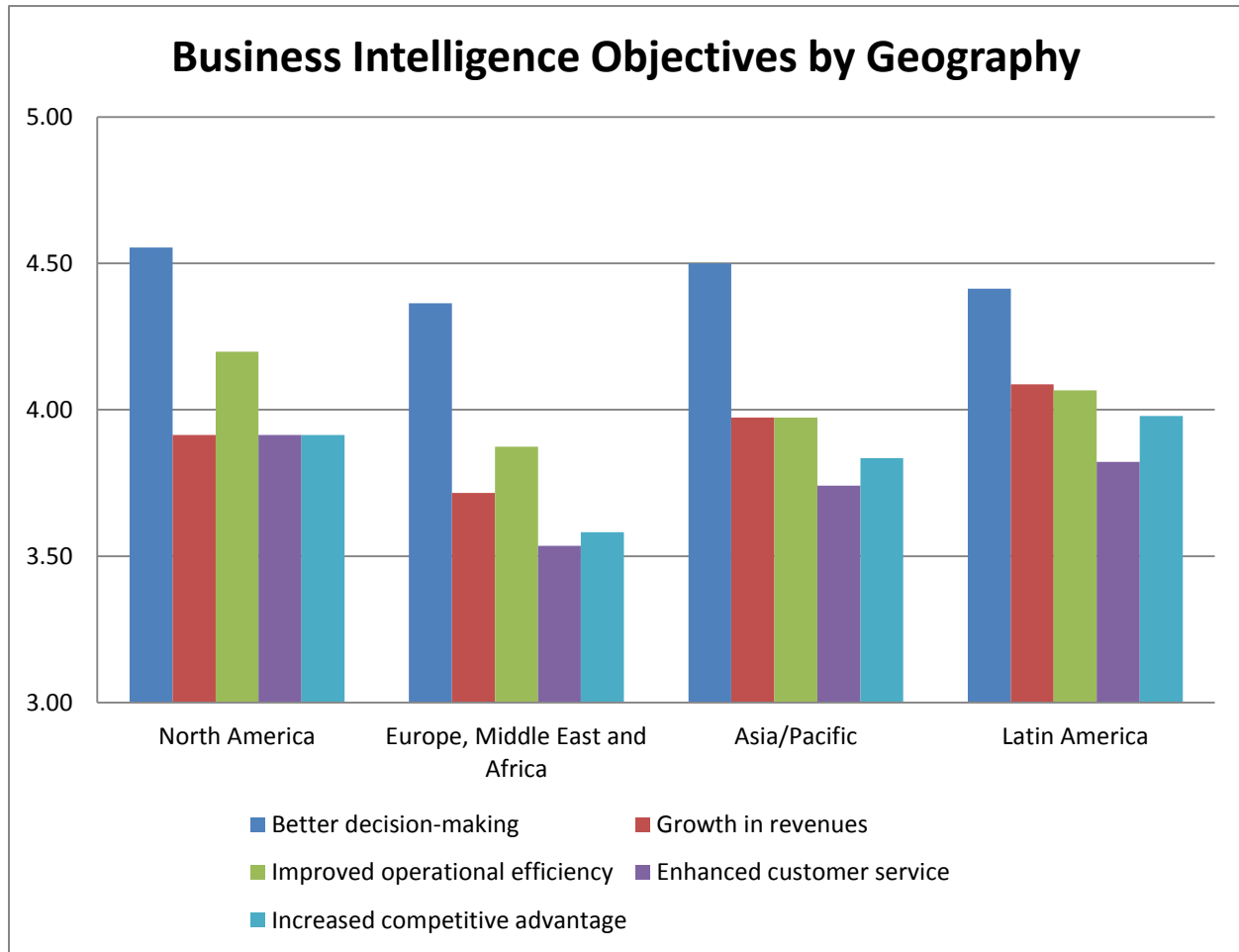
Figure 16 - Business Intelligence Objectives by Geography (Weighted Mean)

Business Intelligence Objectives by Department/Function

Generally speaking objectives for Business Intelligence aligned as expected with organizational roles (Figure 17). For instance, Executive Management, Sales and Marketing place greater importance on "growth in revenues" and "increased competitive advantage", while Finance, IT and Strategic Planning gave "improving operational efficiency" a higher priority. Interestingly, Human Resources gave "enhanced customer service" the highest priority of all other functions.
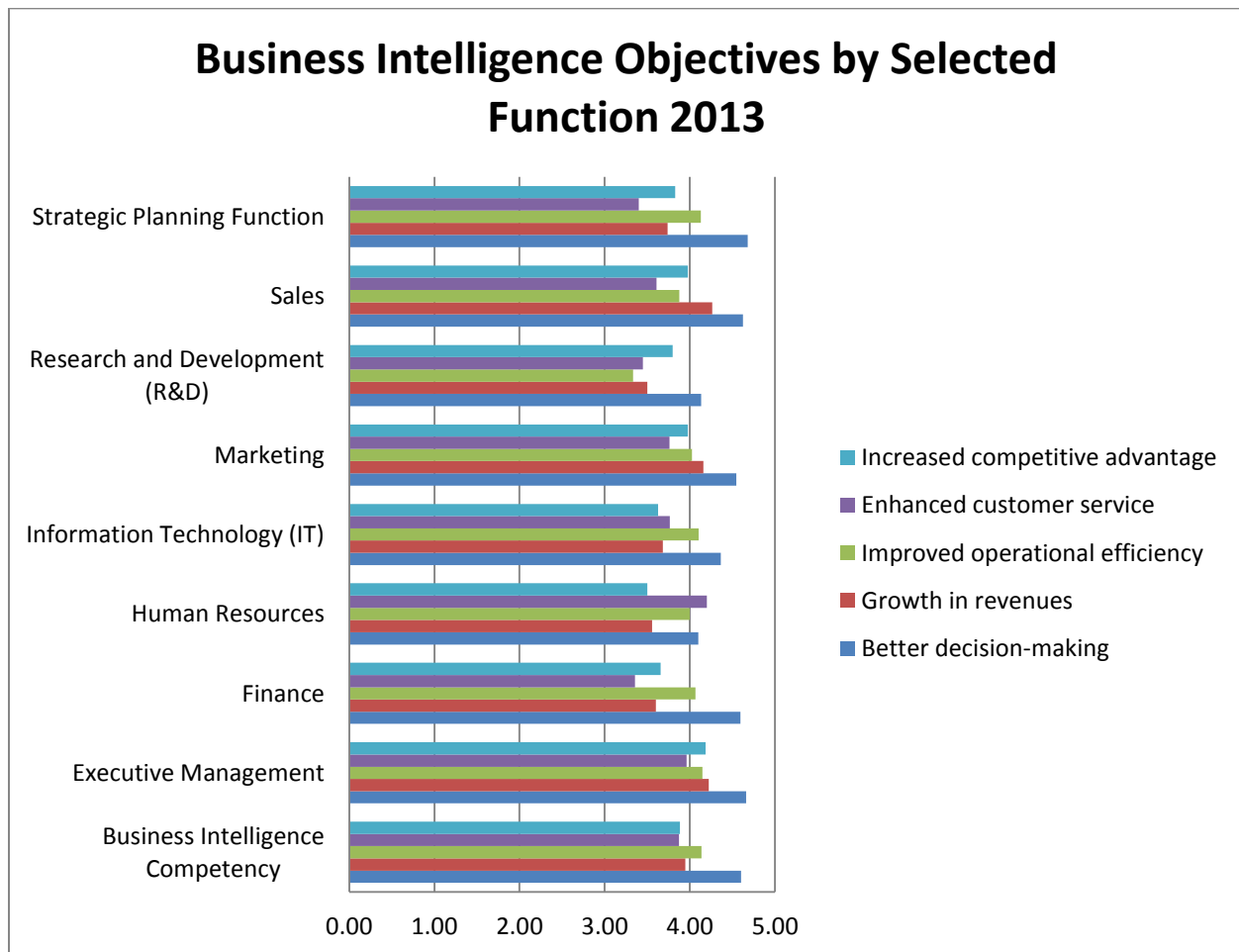
Figure 17 - Business Intelligence Objectives by Selected Function (Weighted Mean)

Business Intelligence Objectives by Industry

Priorities across vertical industry appear largely consistent, with "better decision making" as the top priority and "improved operational efficiency" as a close second (Figure 18). Industries that are especially sensitive to cost place a somewhat higher priority on the second (e.g., Retail, Manufacturing, and Government). Retail and Government placed relatively more importance upon "enhanced customer service".
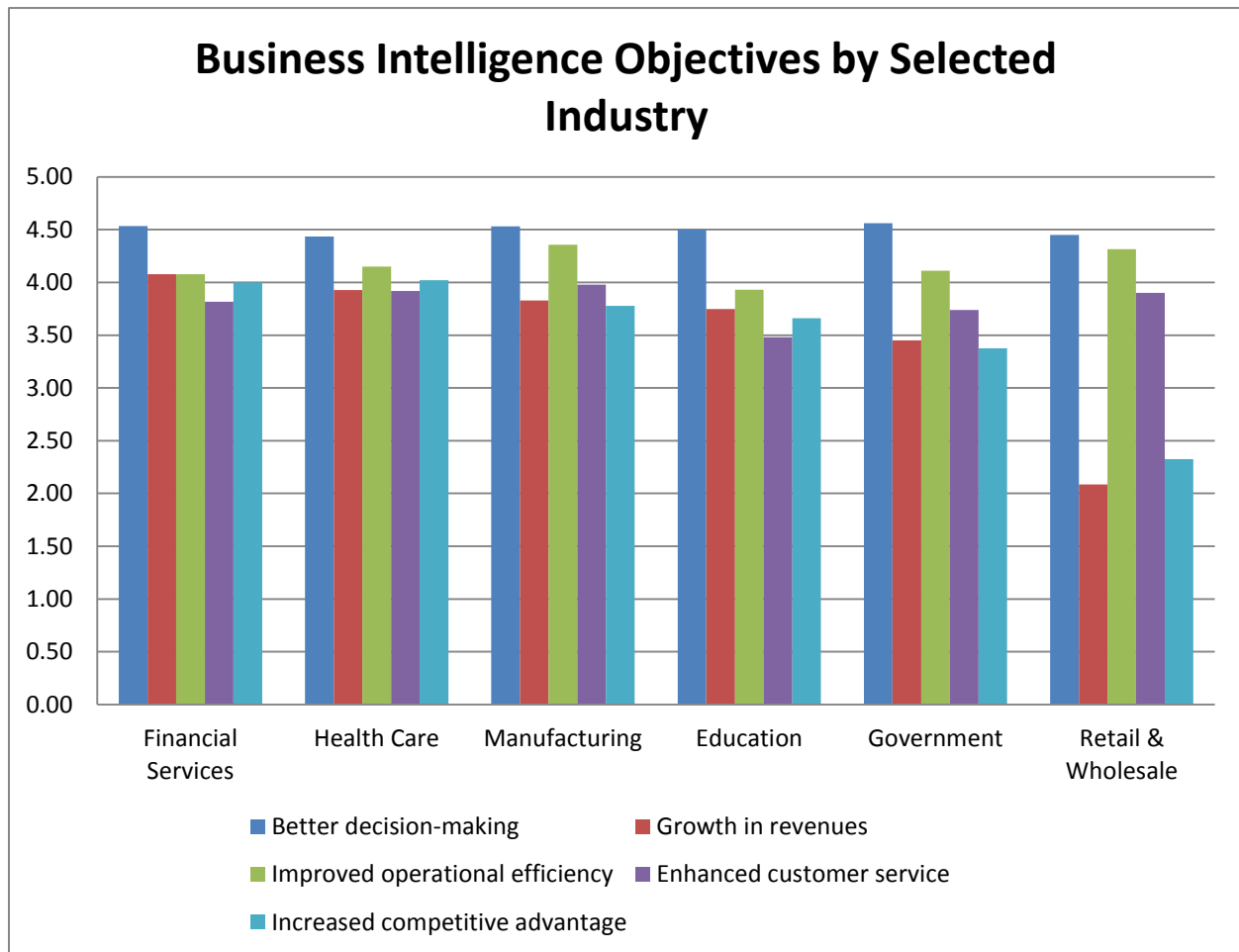
Figure 18 - Business Intelligence Objectives by Selected Industry (Weighted Mean)

Penetration of Business Intelligence:

Although penetration of Business Intelligence (as a percentage of numbers of employees) has been on the rise, progress has been modest. Our latest data suggests that, in most organizations, only a minority of employees have access to Business Intelligence (Figure 19).

Penetration of Business Intelligence Solutions Today
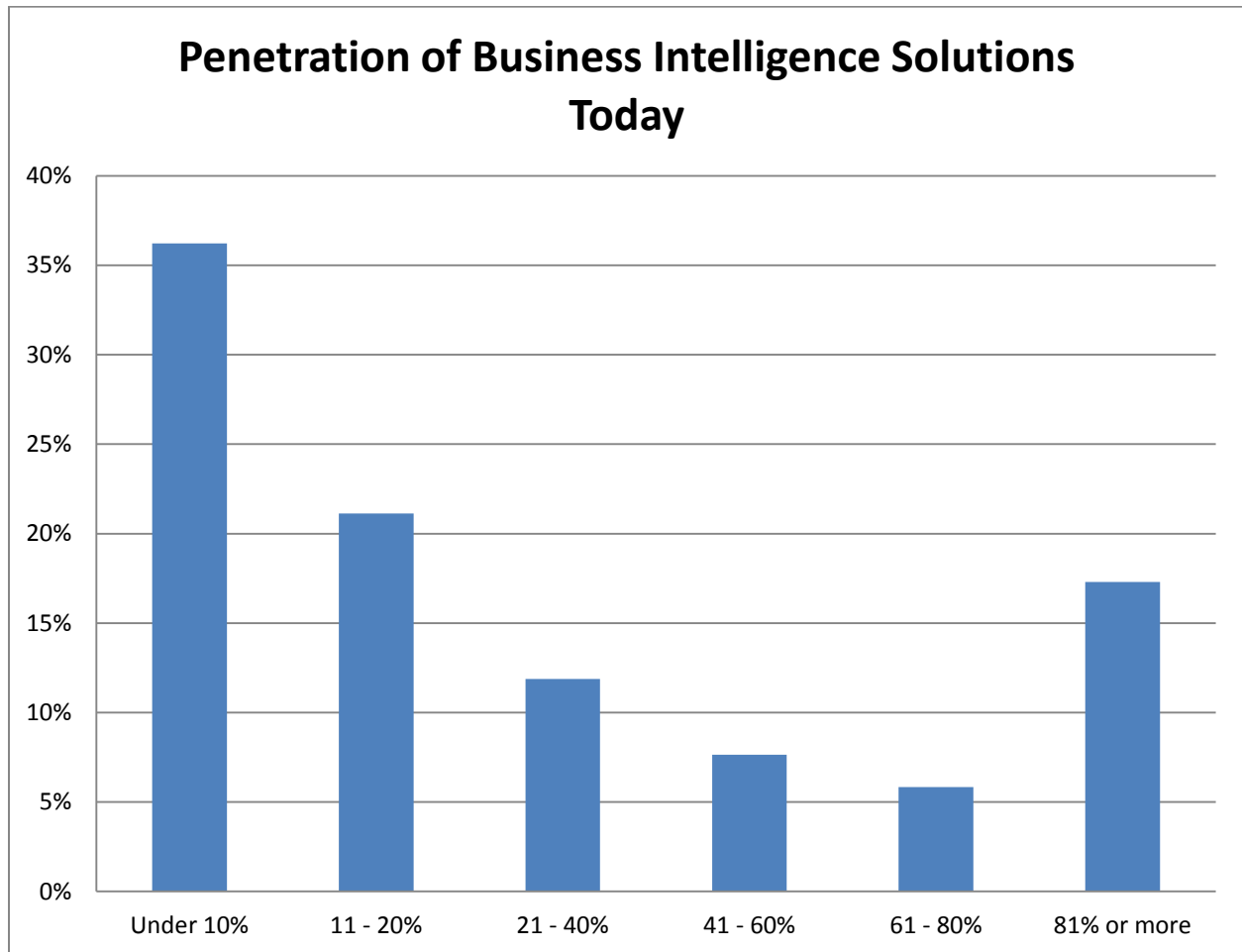
Figure 19 –Penetration of Business Intelligence Solutions Today

Expansion Plans for Business Intelligence Through 2016

Looking forward to 2014 and beyond, respondents indicate ambitious plans for the expansion of Business Intelligence to more users (Figure 20). Although actual numbers will likely be far less than these plans indicate, their intent is clear. Organizations want Business Intelligence capabilities extended to vastly more users than have access today.
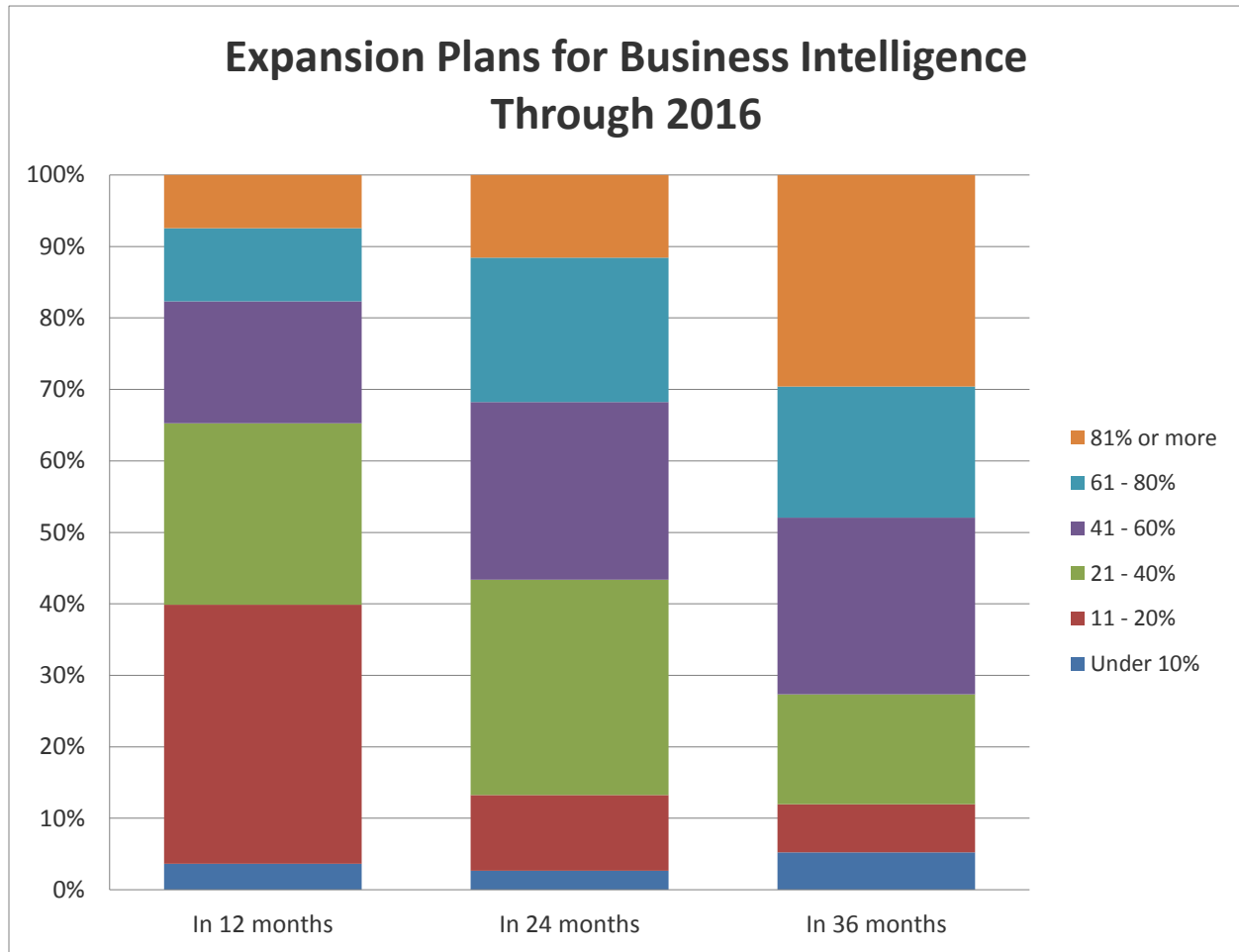
Figure 20 - Expansion Plans for Business Intelligence through 2016

Current Business Intelligence Penetration by Geography

Taking a closer look at current penetration by geography, North America appears to lead other geographies in penetration of Business Intelligence users, followed by EMEA, APAC and Latin America (Figure 21). Historically, this has been a consistent trend for Business Intelligence adoption.
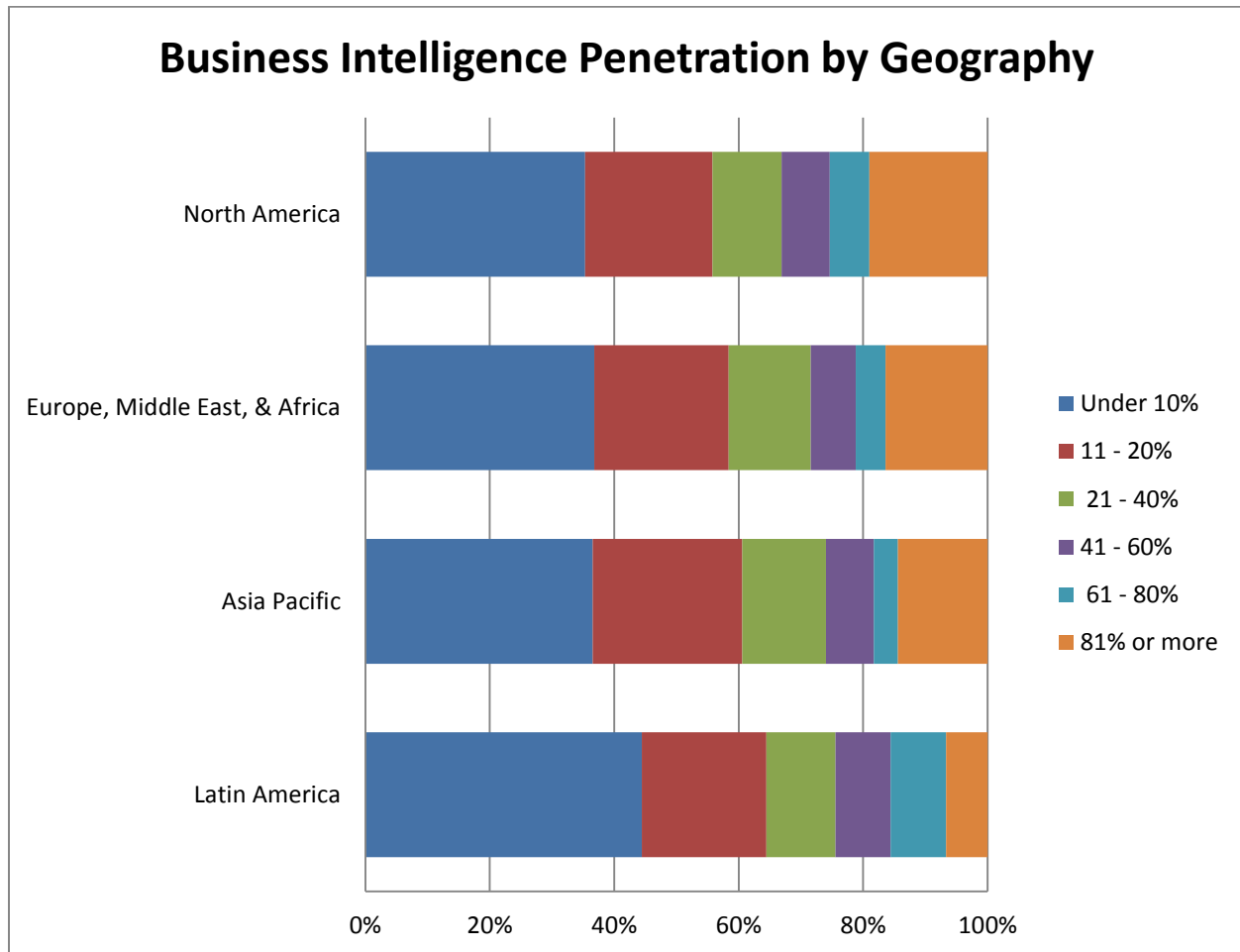
Figure 21 - Business Intelligence Penetration by Geography

2014 Planned Business Intelligence Penetration by Geography

Although North America historically has the most aggressive plans for BI, APAC appears to have the most ambitious plans of any of the four major geographies, led by New Zealand, Australia and Japan. EMEA countries with the most ambitious plans include South Africa, Belgium and the United Kingdom (Figure 22).
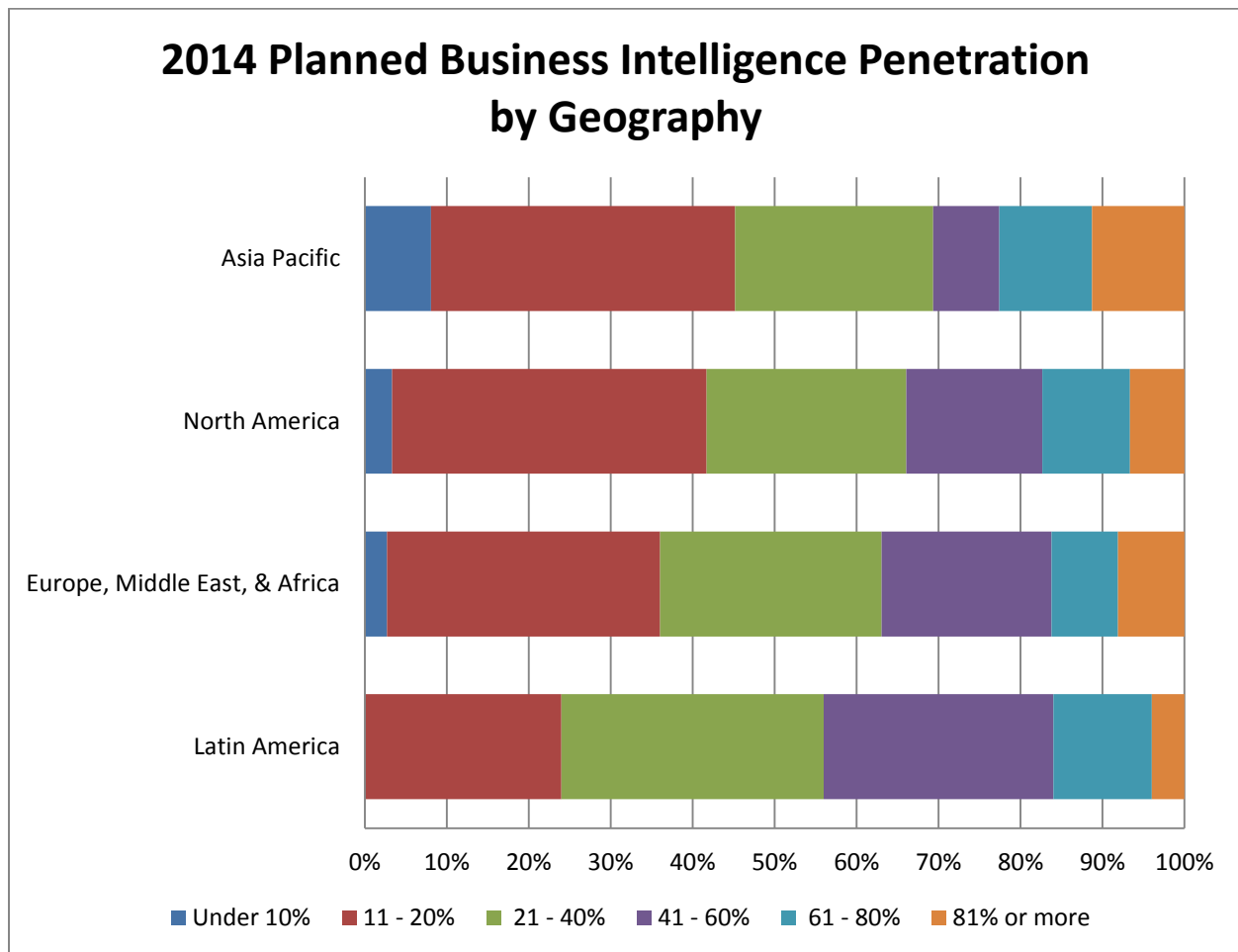
Figure 22 – 2014 Planned Business Intelligence Penetration by Geography

Current Business Intelligence Penetration by Industry

Historically, Financial Services has been amongst the most consistent investors in Business Intelligence, followed by Retail & Wholesale (Figure 23). More recently, we've seen growing adoption by Healthcare and Education.
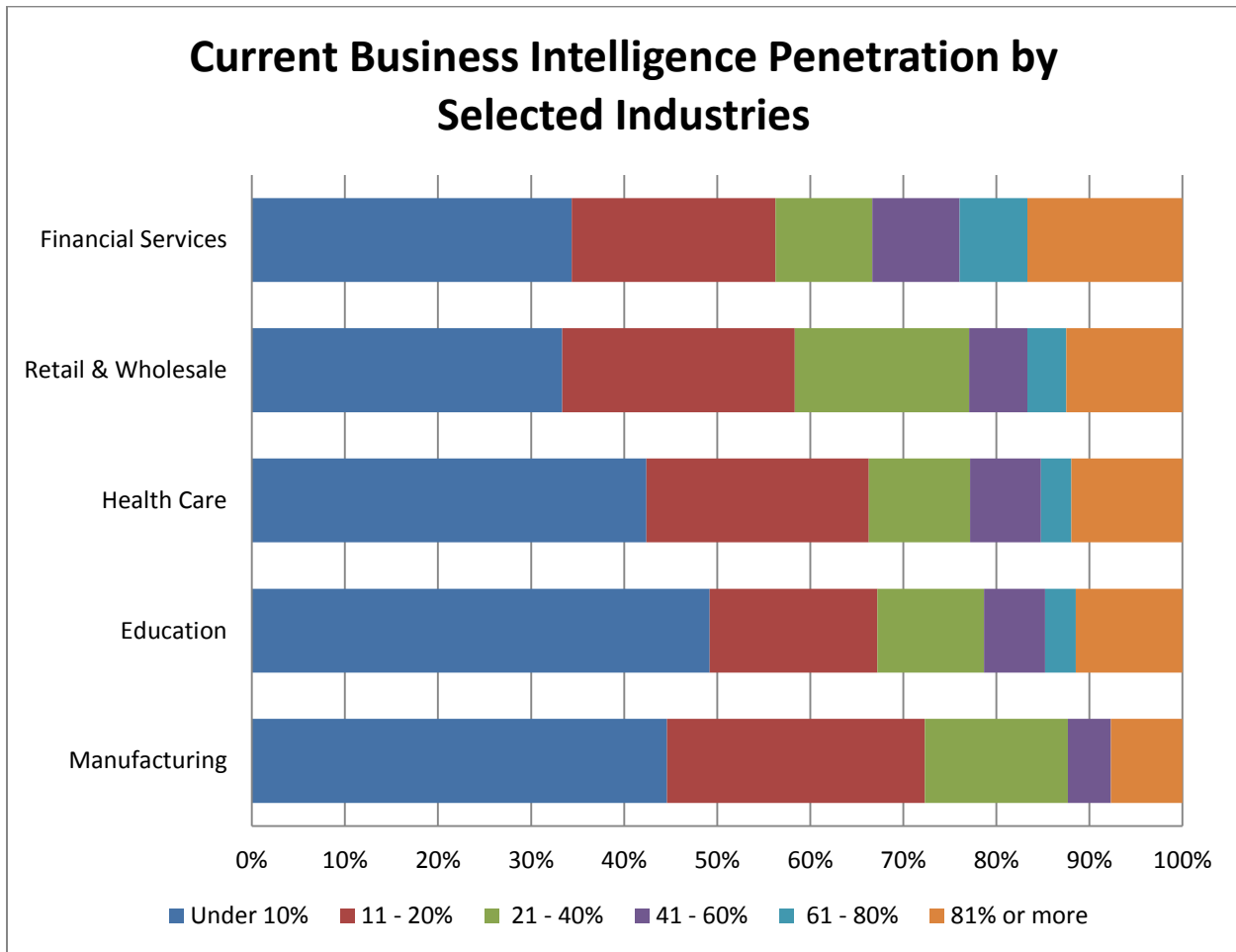
Figure 23 – Current Business Intelligence Penetration by Selected Industries

2014 Planned Business Intelligence Penetration by Industry

Moving forward to 2014, industries poised for an expansion of Business Intelligence within their user bases are Financial Service, Healthcare, Education and Retail & Wholesale. Government and Manufacturing segments have somewhat less ambitious plans (Figure 24).
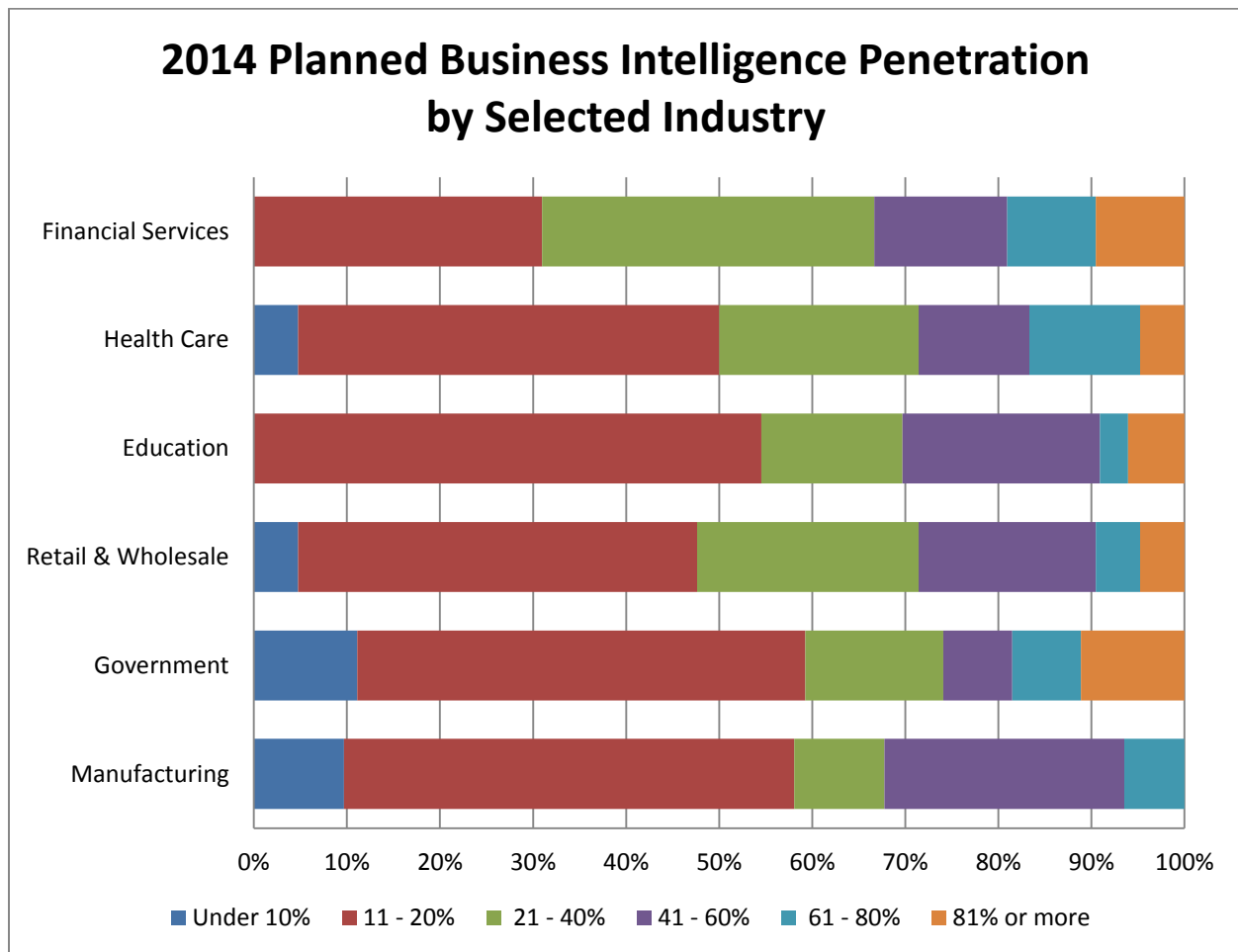
Figure 24 – 2014 Planned Business Intelligence Penetration by Selected Industry

Current Business Intelligence Penetration by Organization Size

Business Intelligence adoption continues to be strongest in the smallest of organizations and the largest (Figure 25). The smallest organizations invest in BI to level the competitive playing field. With greater agility, smaller organizations can deploy more quickly and more extensively than their larger counterparts. The largest organizations have strong intent and ample resources to deploy Business Intelligence, but are slowed by organizational complexity. In contrast, mid-sized organizations lack the agility of smaller organizations and the resources of the largest. Hence, by comparison, their deployment has been limited.
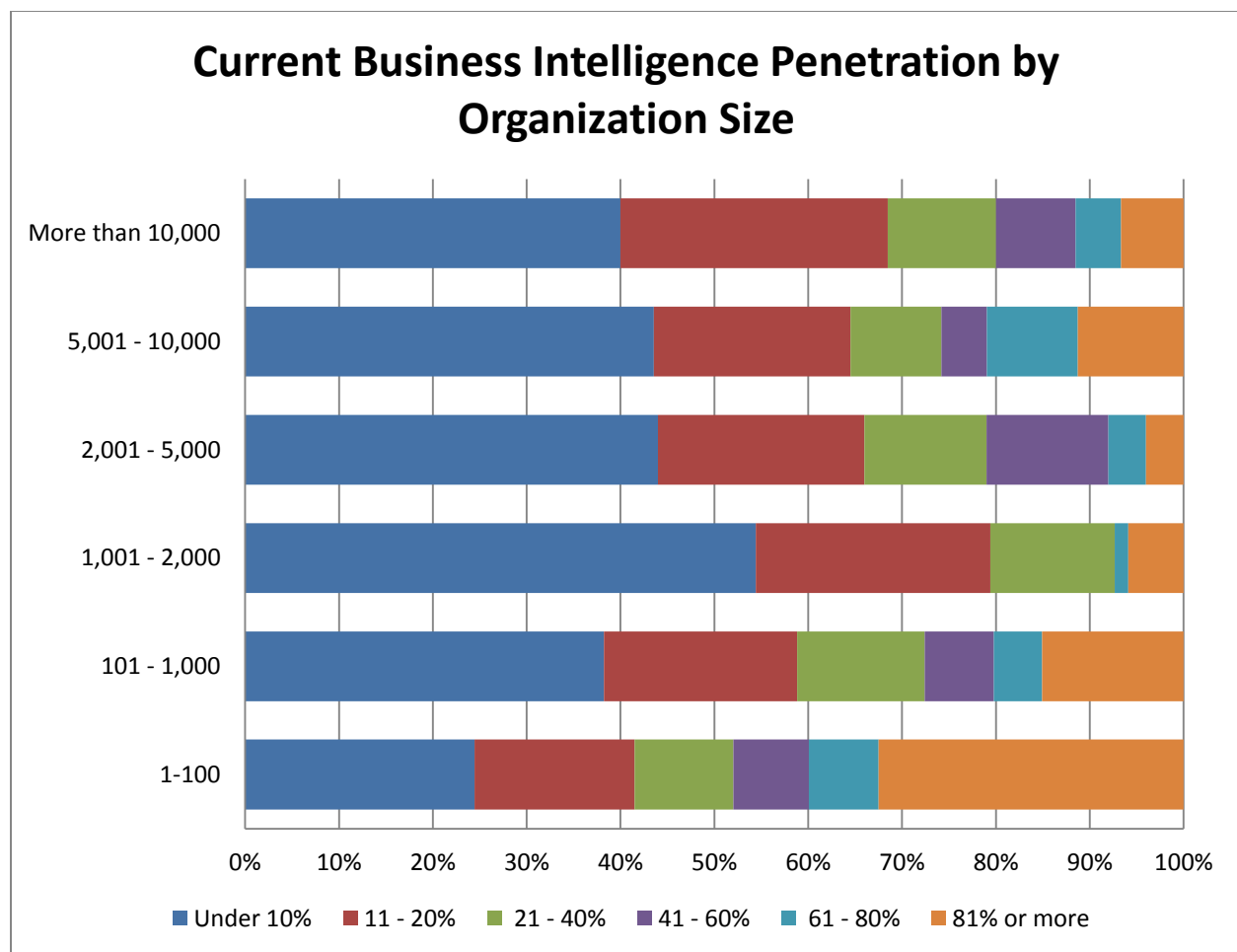
Figure 25 – Current Business Intelligence Penetration by Organization Size

2014 Planned Business Intelligence Penetration by Organization Size

All sizes of organizations appear to have ambitious plans for Business Intelligence through 2014. These plans align with current penetration with the smallest and very largest organizations maintaining their advantage over mid-sized ones (Figure 26).
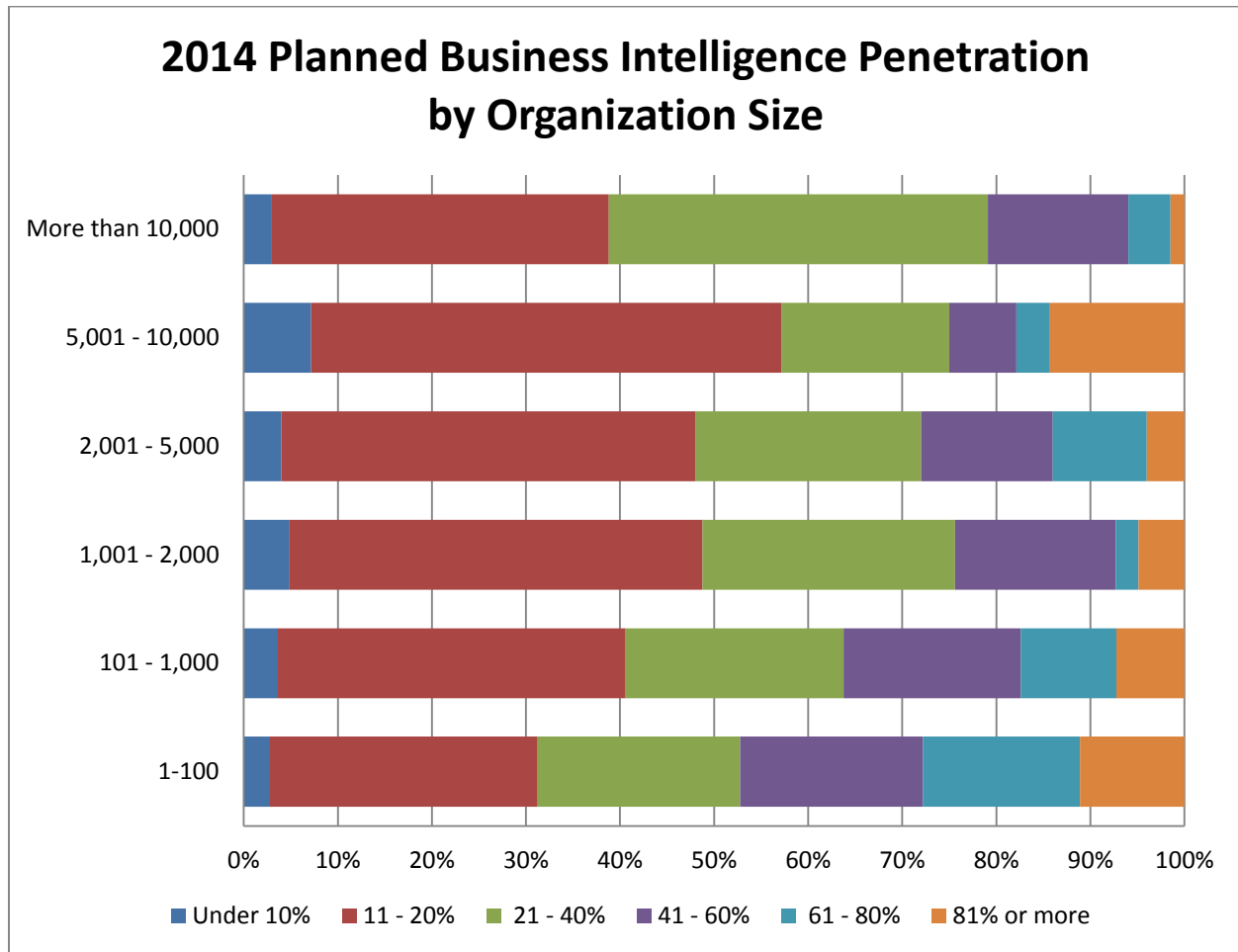
Figure 26 – 2014 Planned Business Intelligence Penetration by Organization Size

Current Business Intelligence Penetration by Function

From a functional perspective Executives reported the highest penetration of Business Intelligence within their organizations, followed by Marketing and the BI Competency Center (Figure 27). In contrast, the Finance and IT functions reported somewhat lower penetration. We believe that this reflects the relative importance of Business Intelligence and related investment by function.
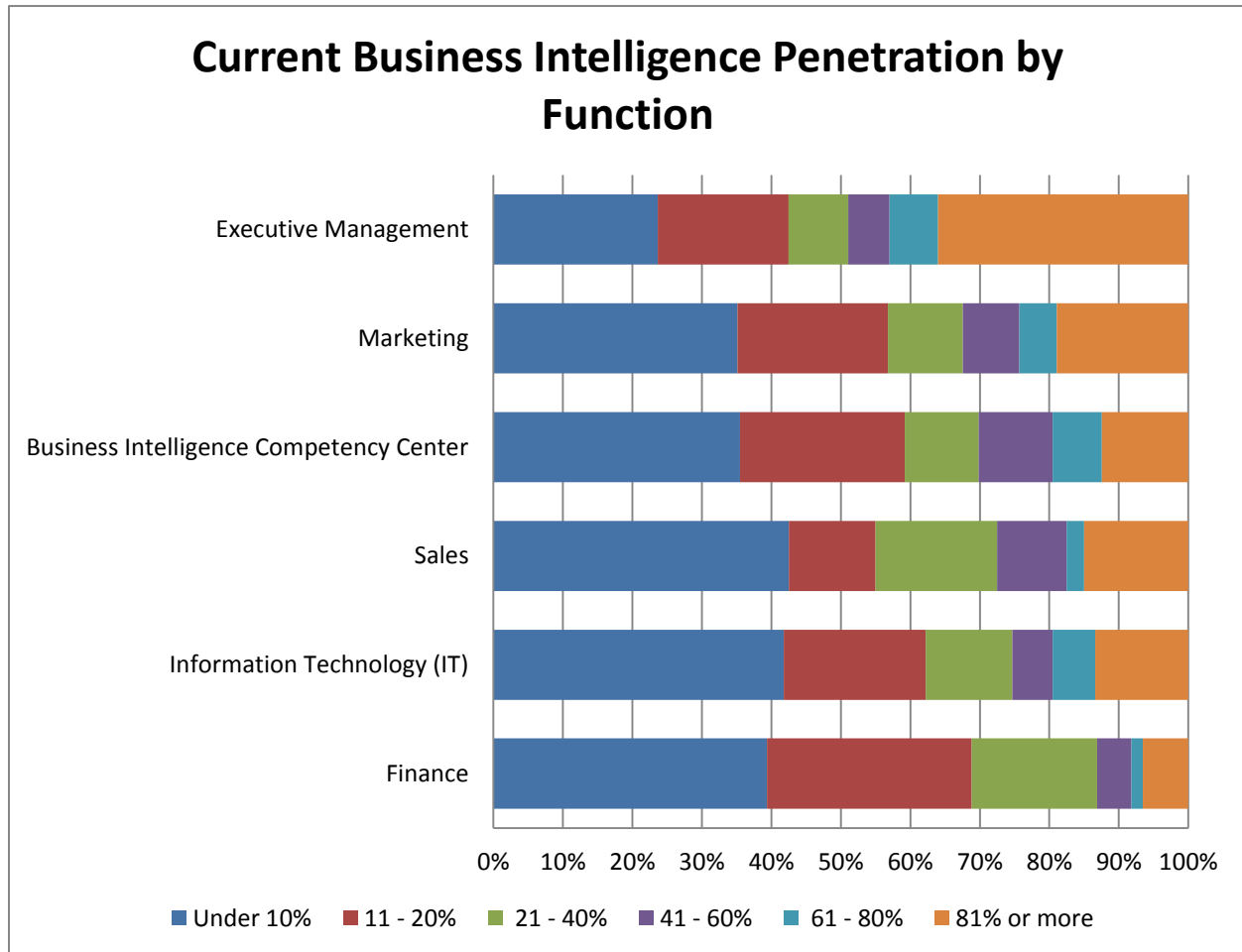
Figure 27 – Current Business Intelligence Penetration by Function

2014 Planned Business Intelligence Penetration by Function

Looking forward to 2014 and beyond, all functions indicated increased plans for investment in Business Intelligence. Executive Management appear to have amongst the strongest intent, followed by the BI Competency Center and Marketing (Figure 28). Finance, Sales and IT functions have lesser investment plans.
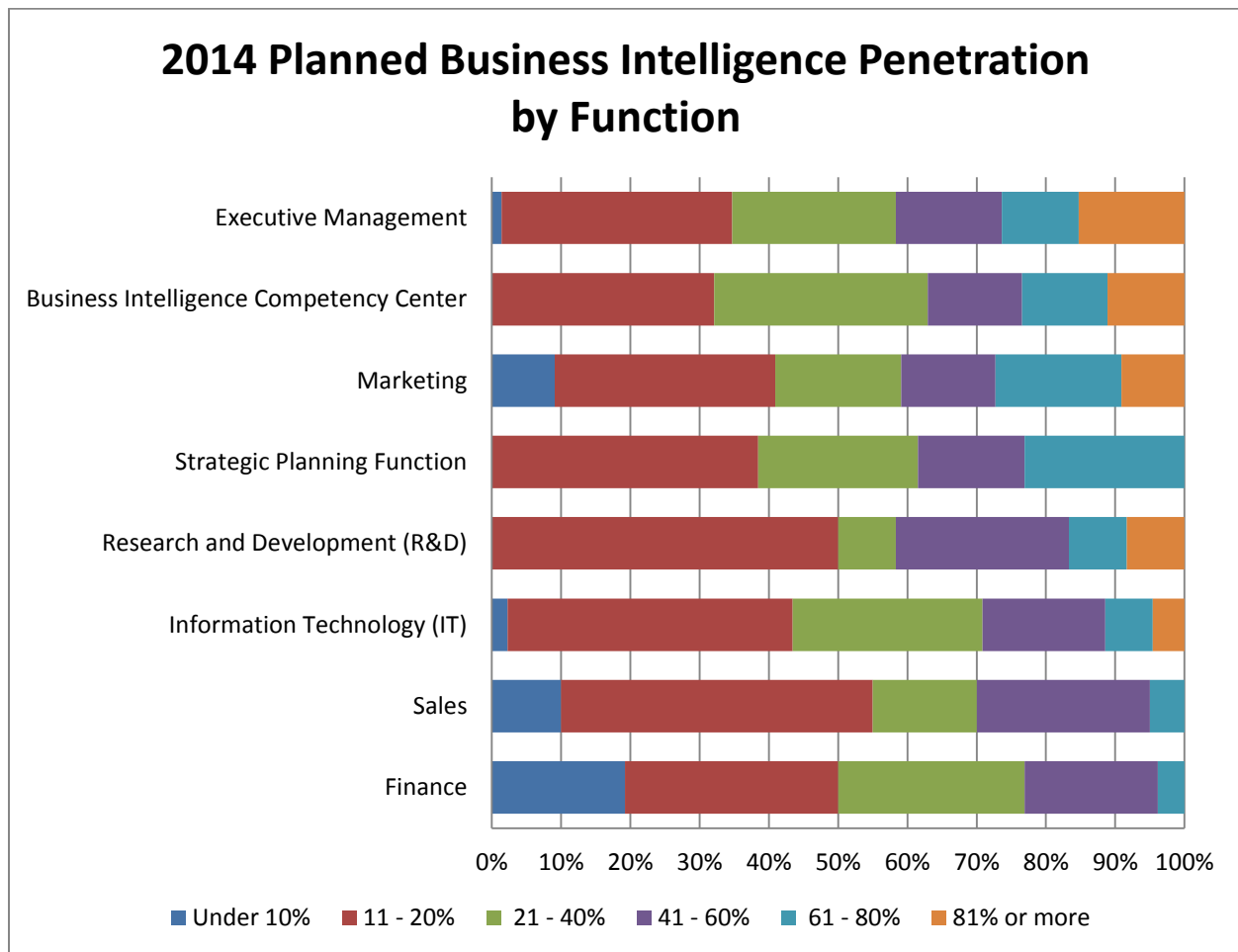
Figure 28 – 2014 Planned Business Intelligence Penetration by Function

Success with Business Intelligence:

Last year we began asking whether organizations agreed with the statement that their Business Intelligence initiatives have been a success. A majority either completely agree or somewhat agree with that statement (Figure 29). This sentiment was relatively stable from 2012 to 2013. That said, a majority do not completely agree, suggesting room for improvement.
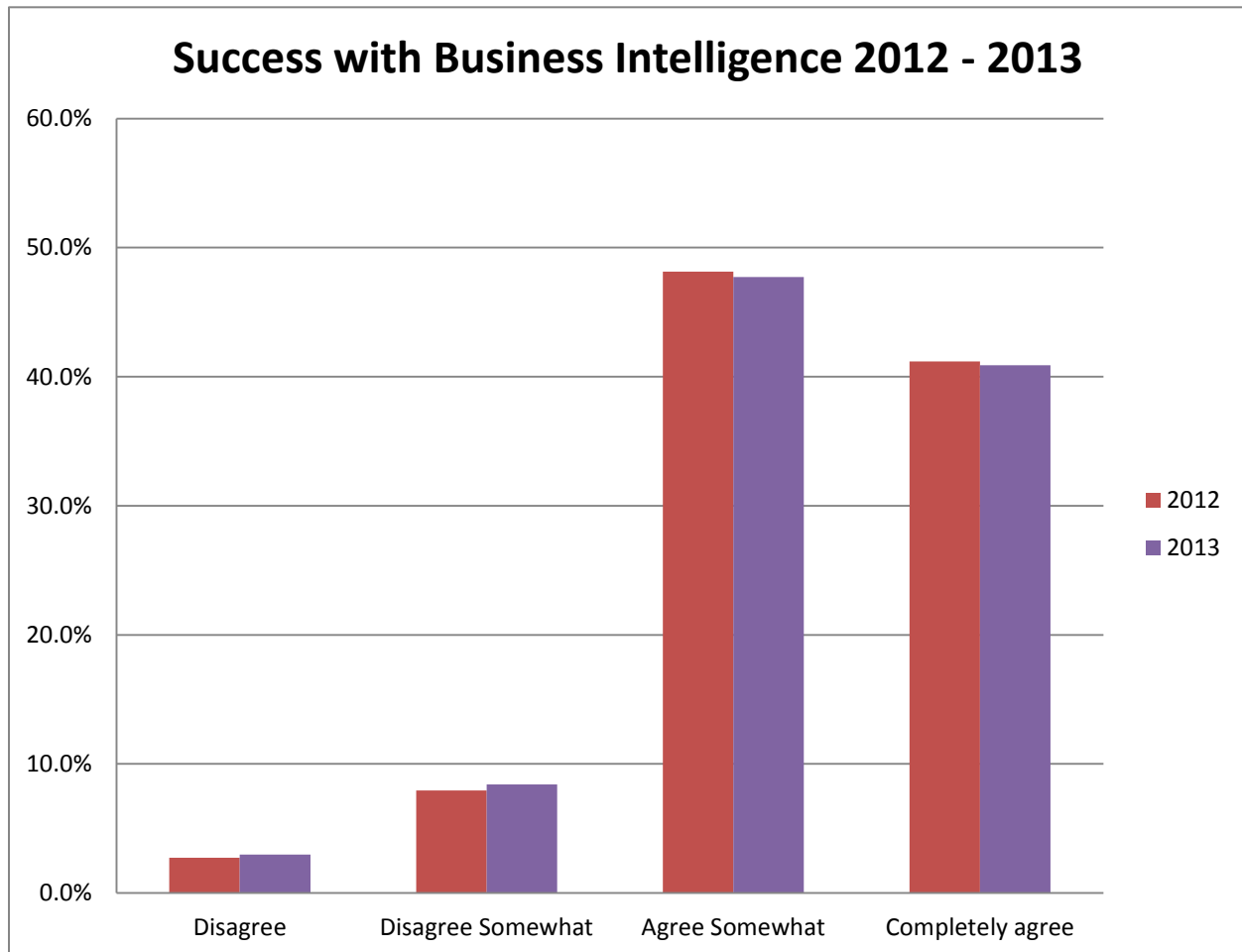
Figure 29 - Success with Business Intelligence: 2012 - 2013

Reasons Why Business Intelligence Succeeds

As with last year, we asked respondents to share why they have (or have not) been successful with Business Intelligence. 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 30 - Reasons for Success with Business Intelligence

Reasons Why Business Intelligence Fails

Conversely, Business Intelligence fails when there is 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 31 - Why Business Intelligence Fails

Success with Business Intelligence by Organization Size

As we have found in previous years, smaller organizations report greater success with Business Intelligence than their larger counterparts (Figure 32). In discussing this with small business leaders, we find two important reasons for this success: 1) executive management "ownership" of the BI initiative and 2) relative ease/speed of deployment and associated realization of business value.
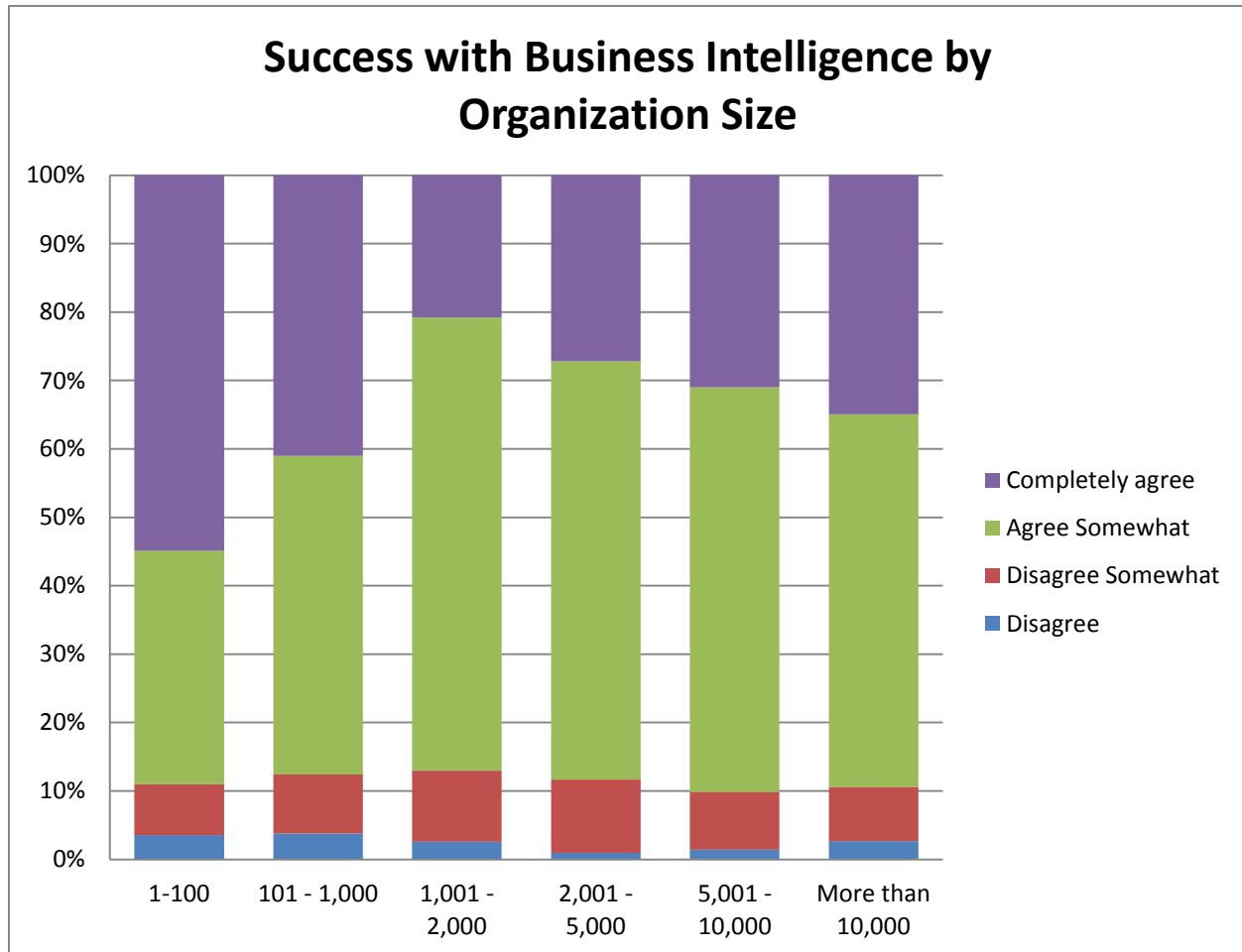
Figure 32 - Success with Business Intelligence by Organization Size

Success with Business Intelligence by Industry

Although all vertical industries claim a measure of success with Business Intelligence, Retail & Wholesale, Healthcare and Government indicate the greatest success (Figure 33). This supports our view, having conducted case studies in Retail & Wholesale and Healthcare. In both industries we've seen significant benefits core to their missions – better patient access/outcomes in healthcare and increased sales and margin in retail.

Success with Business Intelligence by Industry
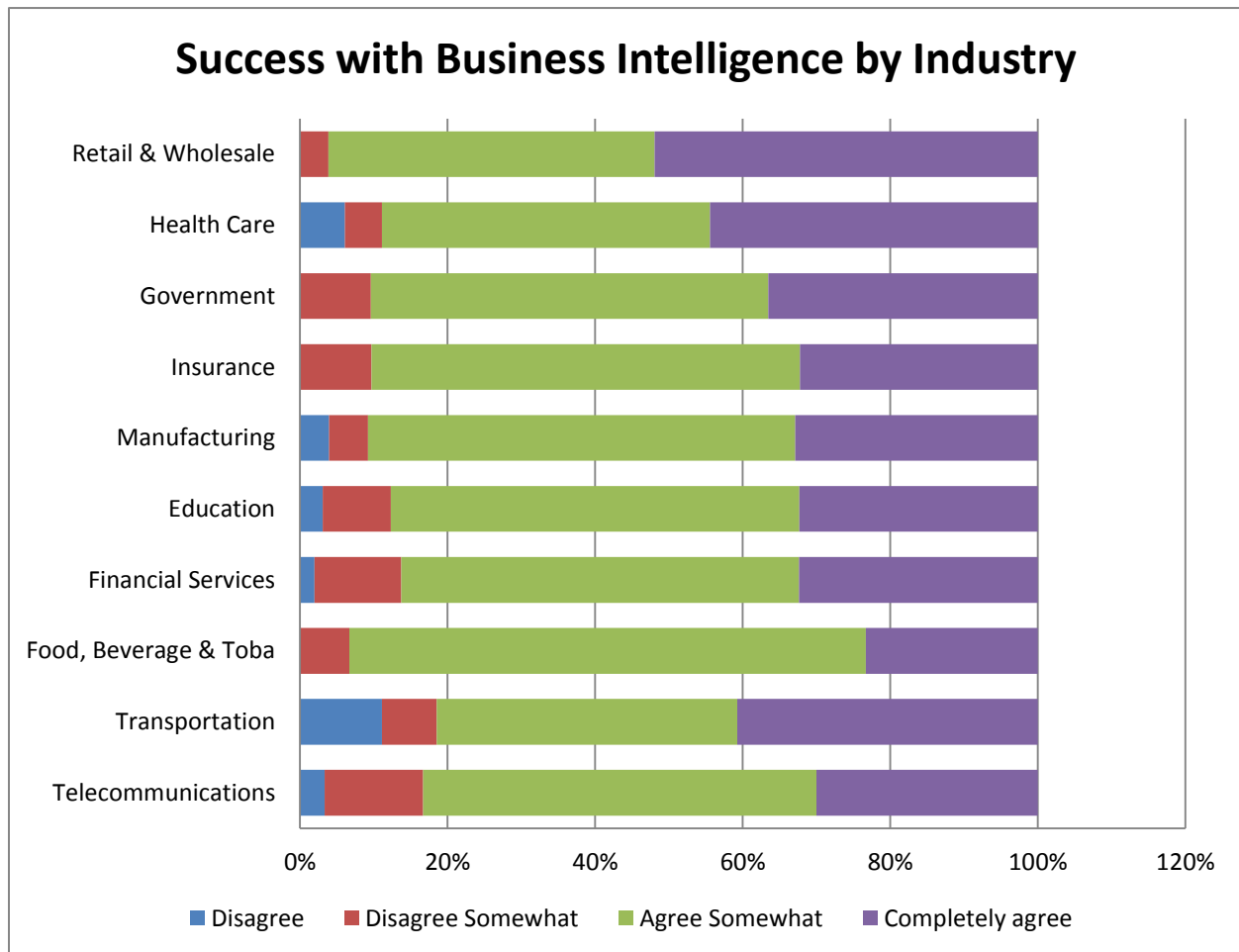
Figure 33 – Success with Business Intelligence by Industry

12 Month Deployment Plans and Success with Business Intelligence

Although seemingly obvious, success tends to lead to even greater success with Business Intelligence. In this case we see that organizations which have been successful with BI have far more substantial deployment plans for the next 12 months (Figure 34). This suggests that organizations should have a well-formed plan for user success in the earliest stages of deployment if they hope to become broadly successful in the future.
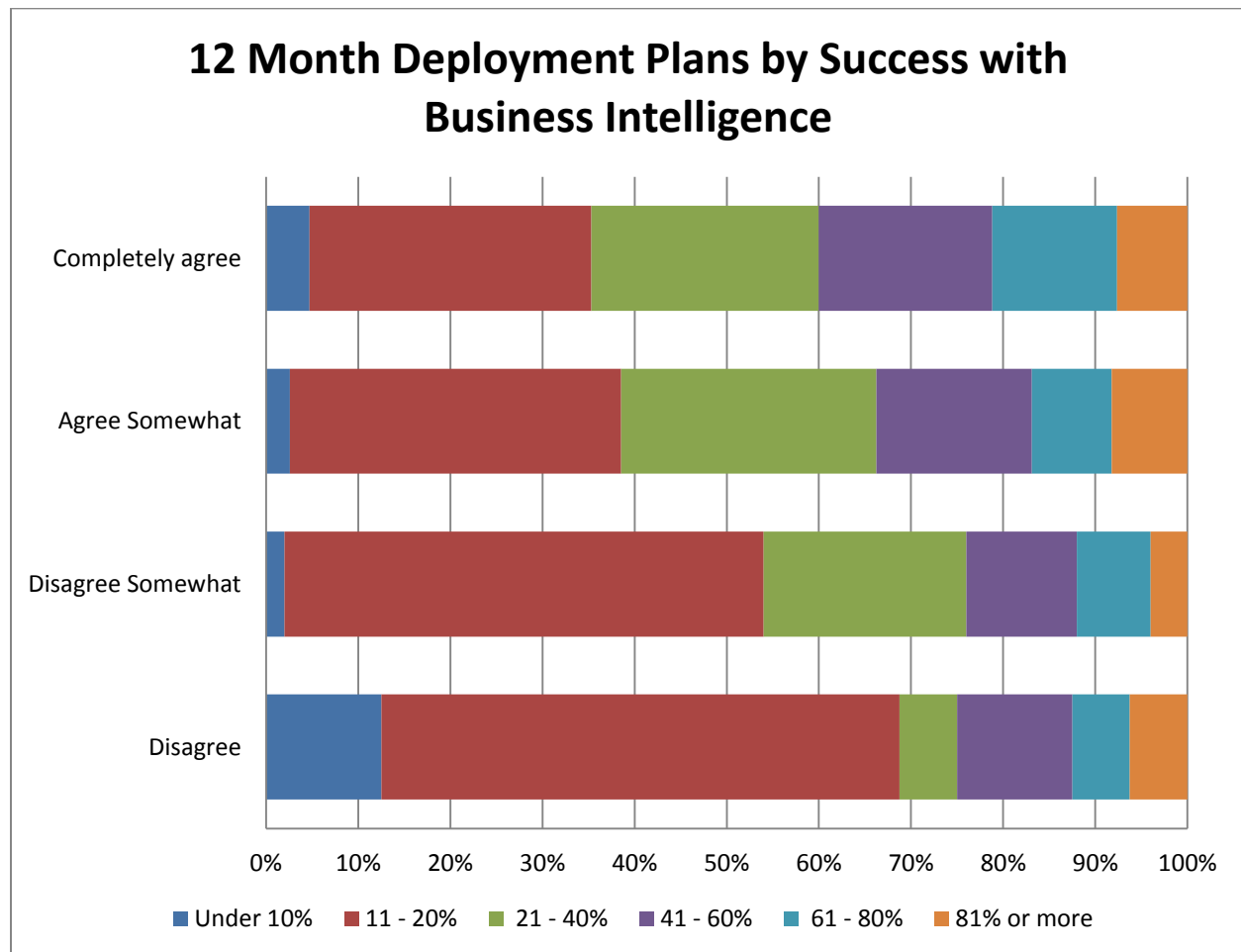
Figure 34 – 12 Month Deployment Plans by Success with Business Intelligence

Numbers of Business Intelligence Tools in Use:

Multiple (oftentimes redundant) Business Intelligence tools within organizations is quite common – with 2 to 3 tools typical (Figure 35). As the size of an organization increases, so do the number of tools in use.
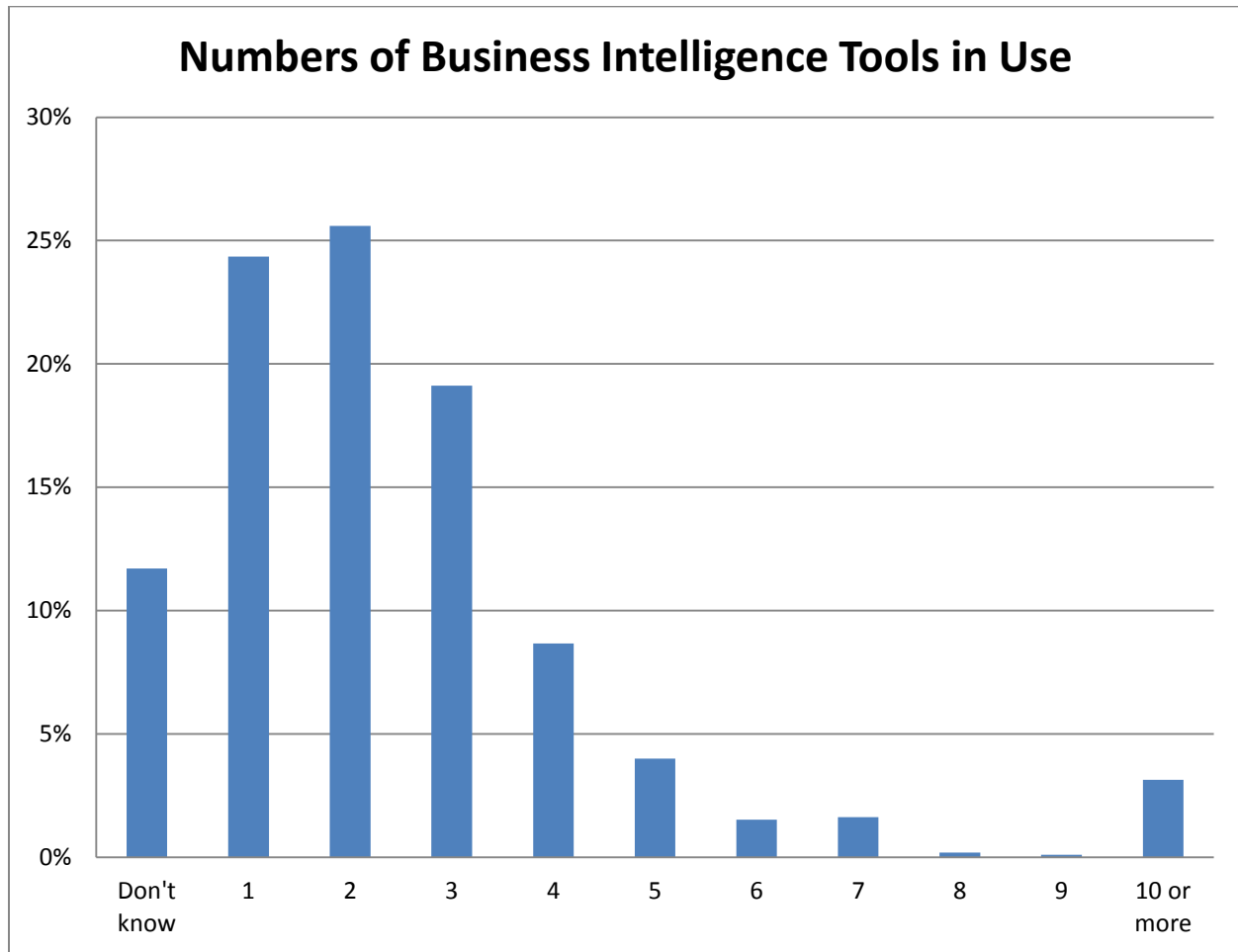
Figure 35 – Numbers of Business Intelligence Tools in Use

Numbers of Business Intelligence Tools: Change from 2012

Compared to 2012, the numbers of tools appear to have increased overall (Figure 36). With so many products now targeted at business users, it is likely that these statistics understate the issue, as users are unaware of all the tools being used within their organizations.

Anecdotally, budgets continue to shift away from IT and towards end user departments. As line-of-business unilaterally invests in tools, numbers of tools will continue to rise.
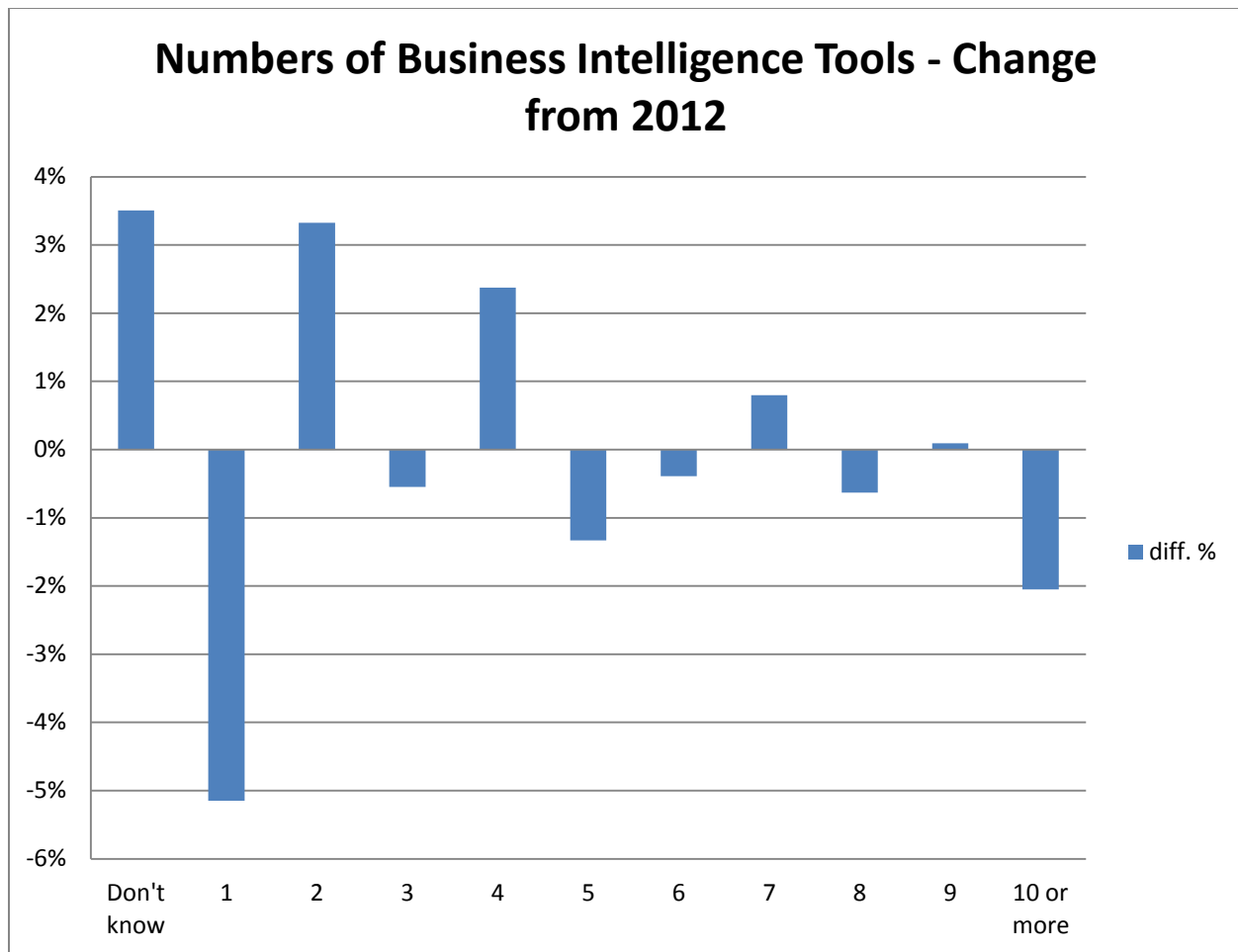
Figure 36 – Numbers of Business Intelligence Tools – Change from 2012

Success with Business Intelligence and Numbers of Tools

This business investment in tools may cause a lack of enterprise coordination surrounding metadata and semantics and presents an ongoing problem to organizations seeking information consistency. From our research, those with fewer tools tended to report greater success with Business Intelligence (Figure 37). In addition, those that were less successful with BI were more likely to not know how many tools were present in the organization – suggesting a lack of coordination across the enterprise with respect to BI.
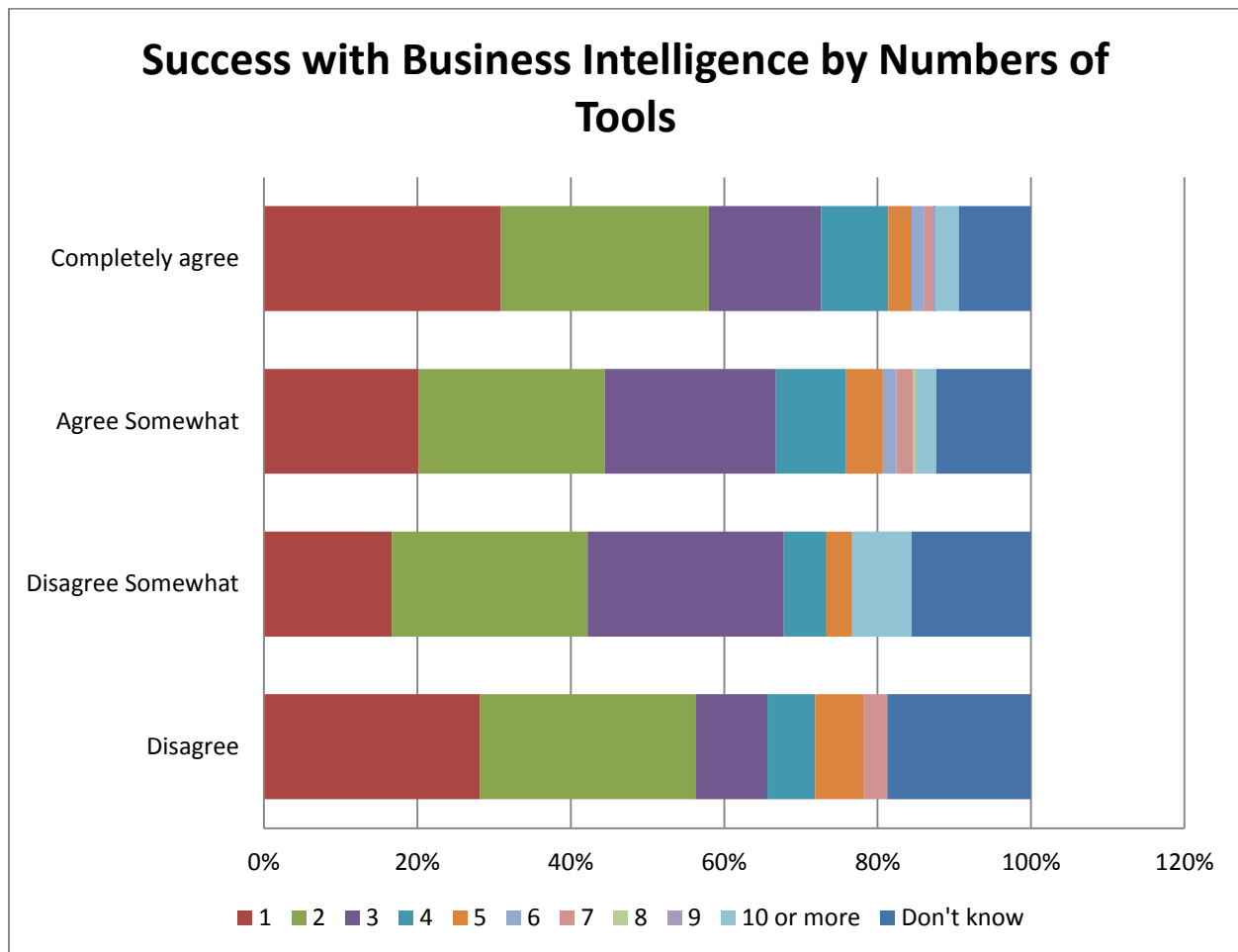
Figure 37 – Success with Business Intelligence by Numbers of Tools

Key Related Technologies / Initiatives

This year we opted to expand our study to include more technologies and initiatives deemed strategic to respondents' Business Intelligence efforts. In all, we asked about 19 areas (versus 16 in 2012), as noted in Figure 38. This year we added Embedded BI, Search-based interface, and Data Discovery. For 2013, top technologies related to BI included: Dashboards, End user "self-service", Advanced visualization and Data Warehousing.
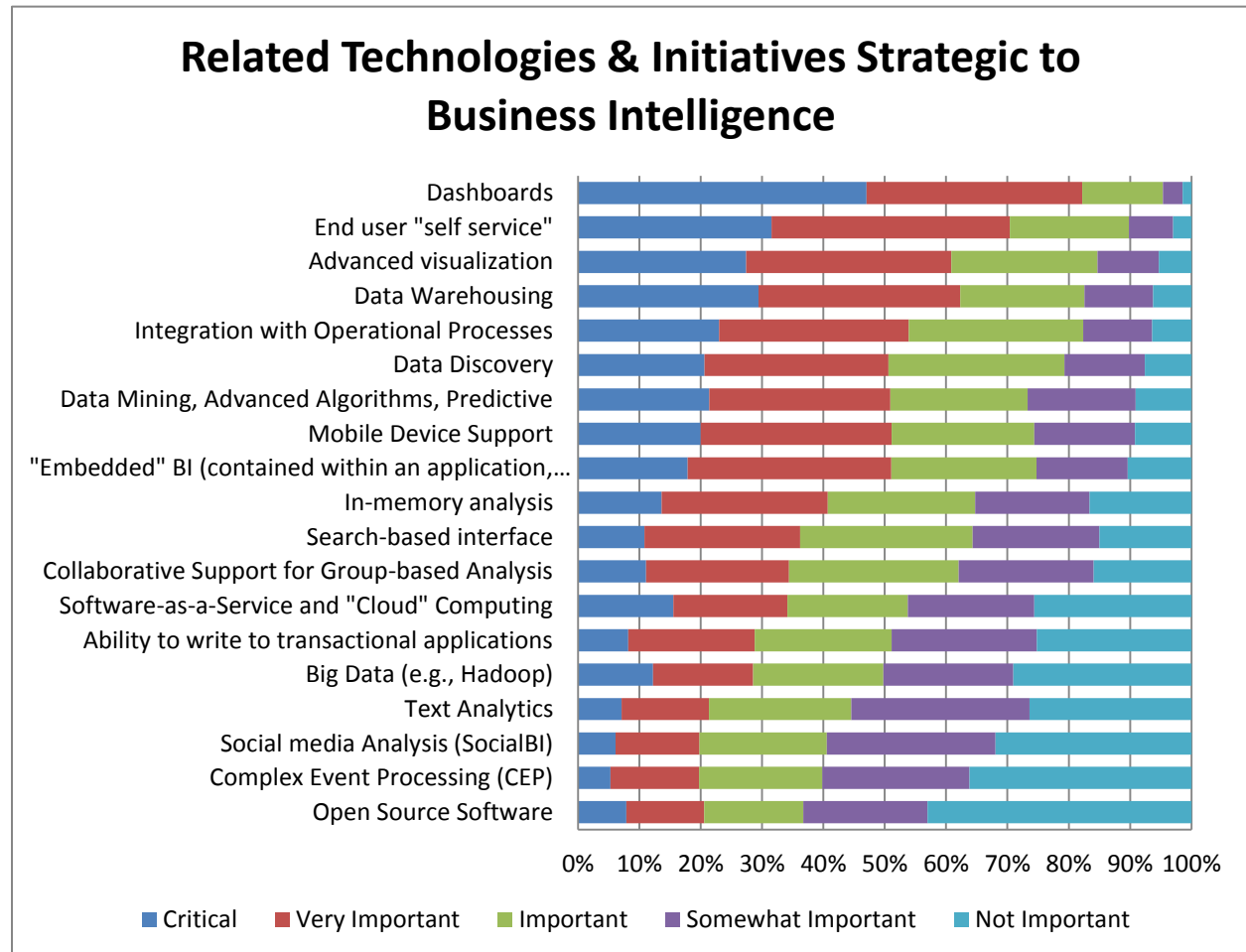
Figure 38 – Related Technologies & Initiatives Strategic to Business Intelligence

Technology Priority Changes from 2012

Only three technologies related to Business Intelligence increased in importance over 2012. These include Software-as-a-Service (Cloud BI), Dashboards and Mobile Device Support (Figure 39). The importance of the majority of related technologies decreased over 2012. In particular, Complex Event Processing, Big Data and Open Source declined the most.
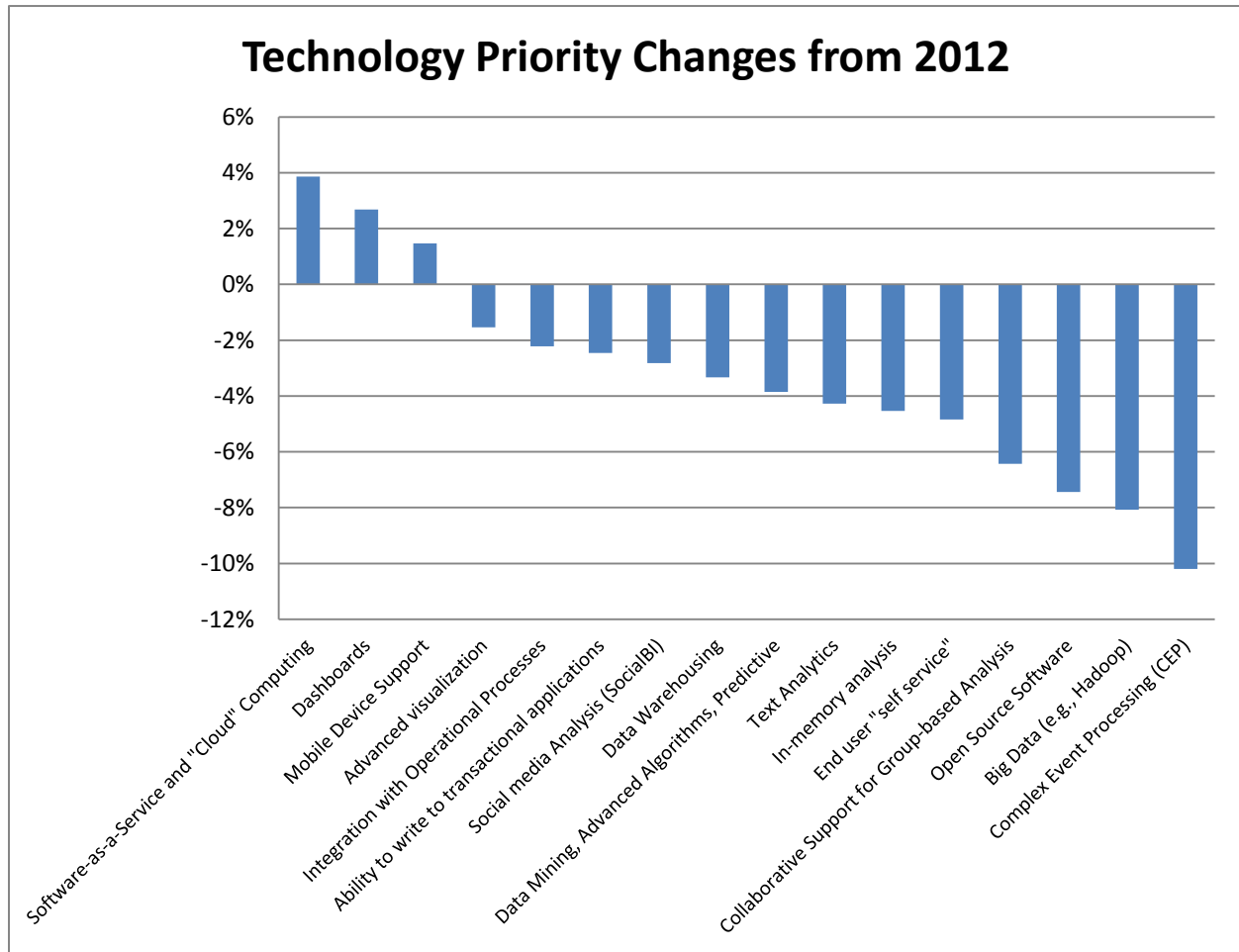
Figure 39 - Technology Priority Changes from 2012

Technology Priorities by Industry

Priorities for a majority of technologies related to BI were consistent across all verticals. However, there were certain technologies and verticals where we identified significant differences (Figure 40). For example, Healthcare and Government gave a higher than average priority to Data Mining and Data Discovery while Financial Services gave a higher relative priority to Software-as-a-Service (Cloud BI).
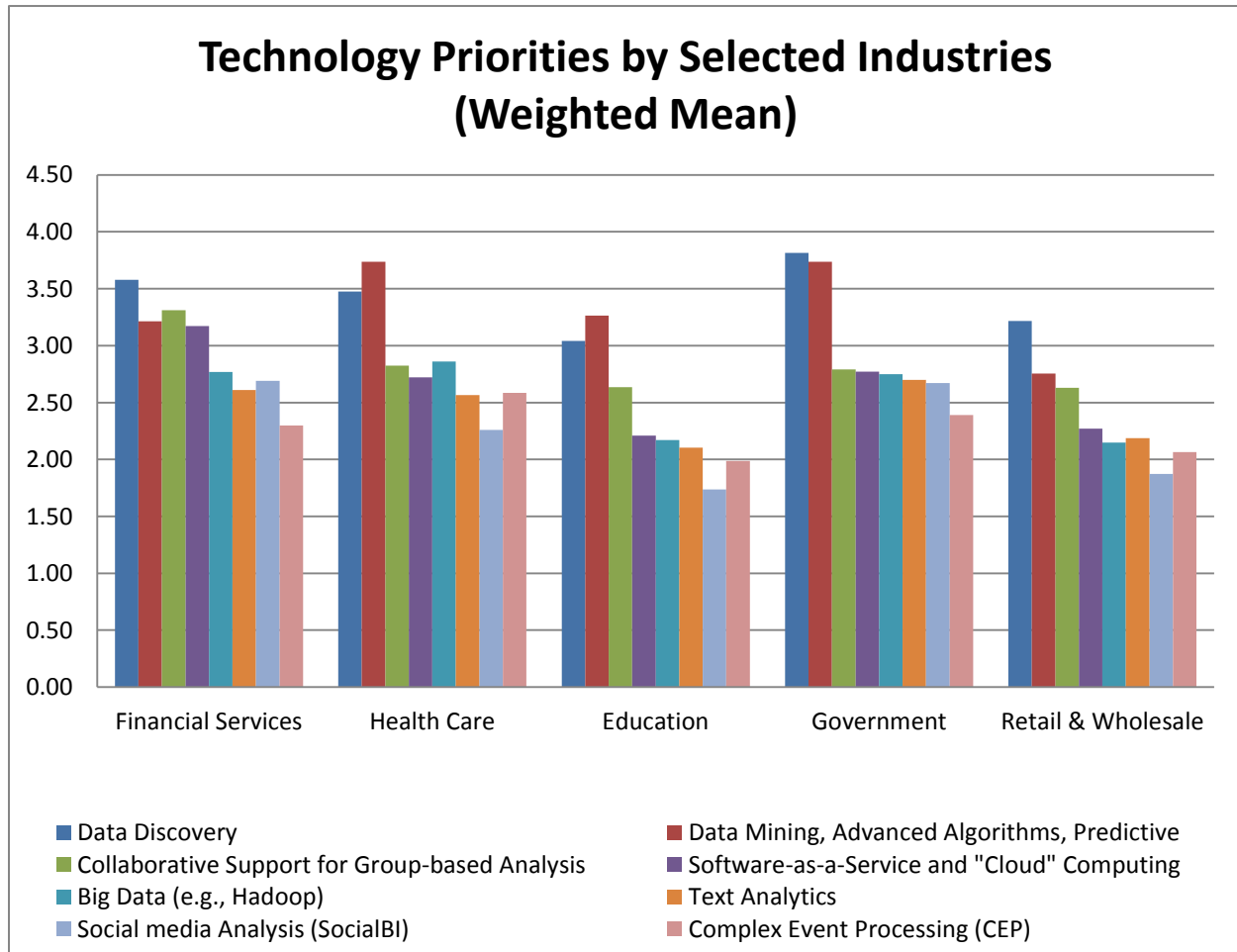
Figure 40 - Technology Priorities by Selected Industries (Weighted Mean)

Technology Priorities by Organization Size

Size of organization has a significant affect upon technology priority. To illustrate this point, we selected seven out of nineteen related technology areas, which resonated with either small or large organizations (Figure 41).
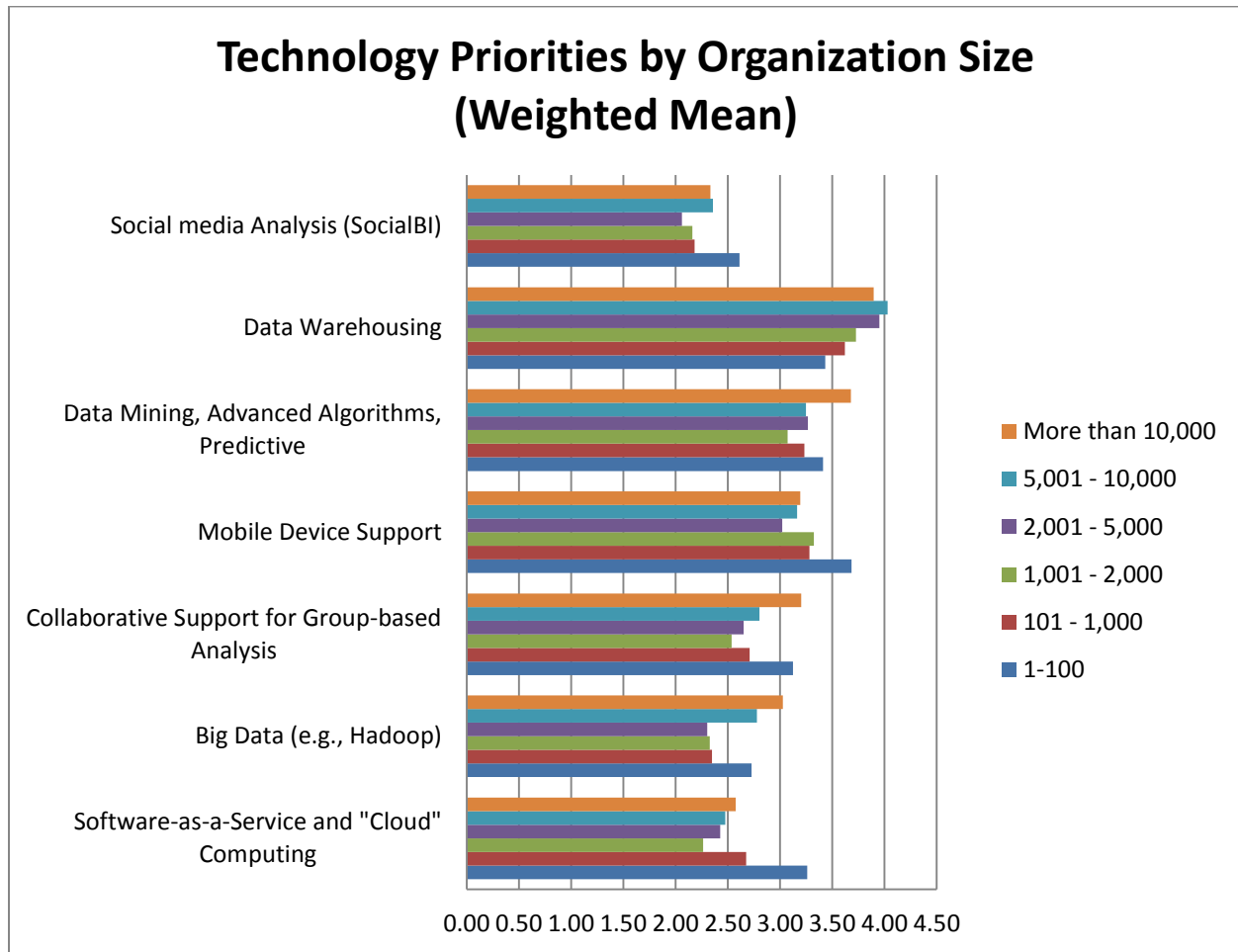
Figure 41 - Technology Priorities by Organization Size (Weighted Mean)

Technology Priorities of Smaller Organizations

Oftentimes smaller organizations will embrace new technologies faster than their larger counterparts. To this point, smaller organizations gave Mobile Device Support, Cloud BI and Social Media Analysis a substantially higher priority than larger organizations (Figure 42).
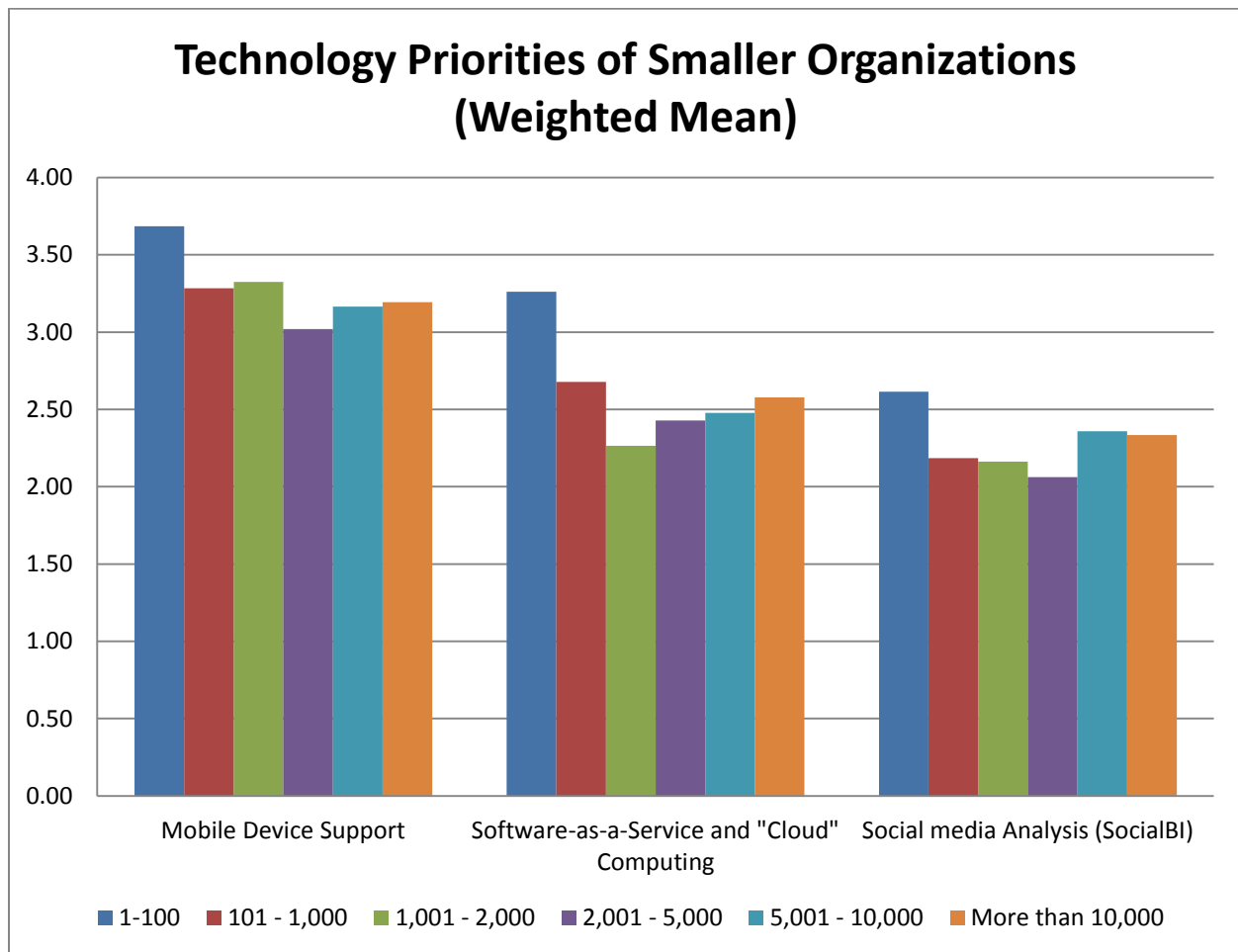
Figure 42 - Technology Priorities of Smaller Organizations (Weighted Mean)

Technology Priorities of Larger Organizations

Larger organizations, coping with tremendous organizational and technological complexity, favor technologies that help compensate. Hence, Data Warehousing, Data Mining, Big Data and CEP resonated with the largest organizations (Figure 43).

Both the largest and smallest organizations gave Collaborative Support for Group-based Analysis a high priority – but for different reasons. Large organizations use collaborative support to help improve internal collaboration whereas small organizations use it to extend BI to external constituents.
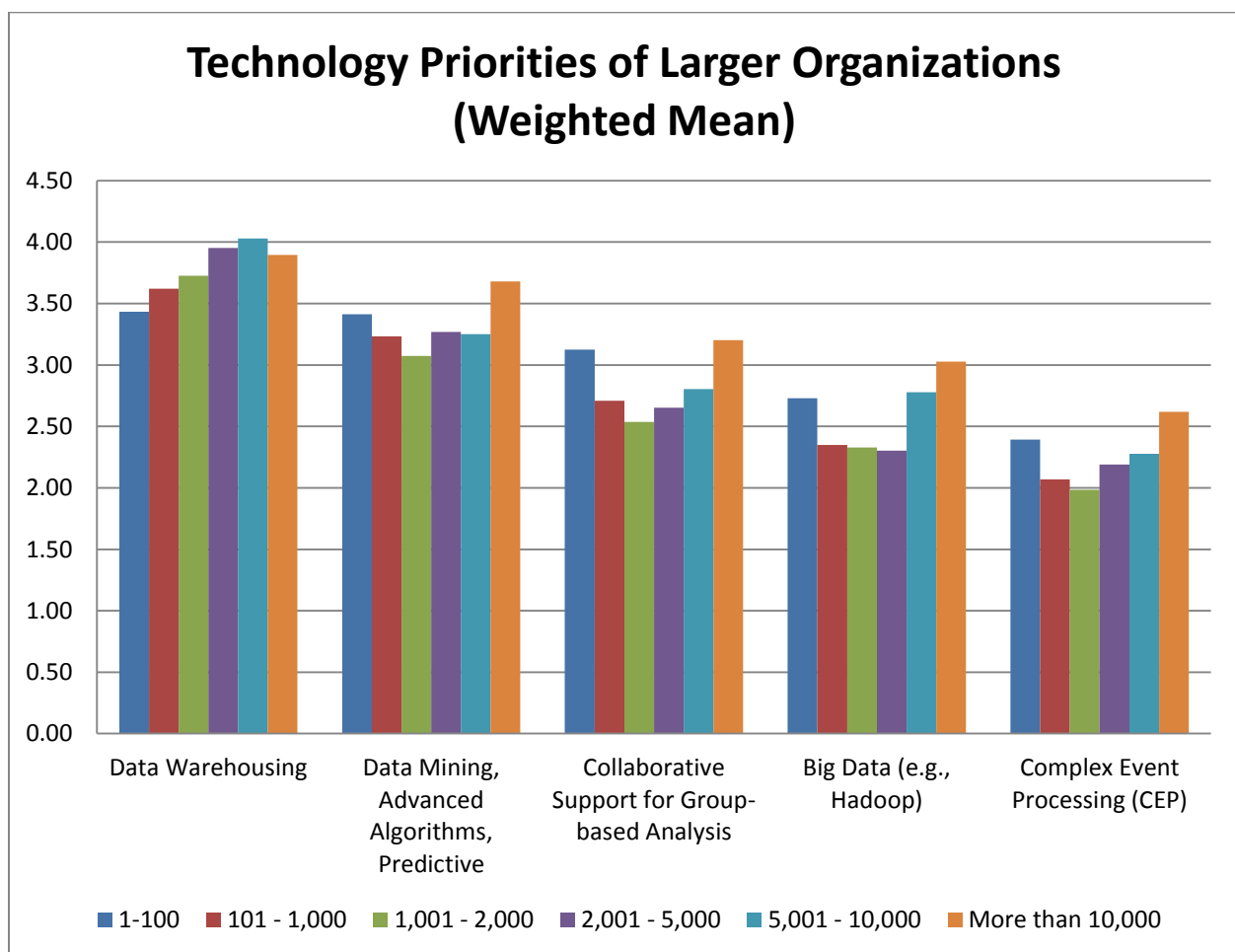
Figure 43 - Technology Priorities of Larger Organizations (Weighted Mean)

Technology Priorities by Function

With some exceptions organizational functions prioritize technologies in the same way. However, there were some interesting differences for six out of the nineteen addressed (Figure 44). For instance, Data Warehousing was a high priority for IT and the BI

Competency Center (many of whom work under IT). Data Discovery appealed broadly – with the exception of Finance. Executive Management and Sales place a very high value on Mobile BI. And, business and support functions are polarized when it comes to Cloud BI – with business in favor and support opposed.
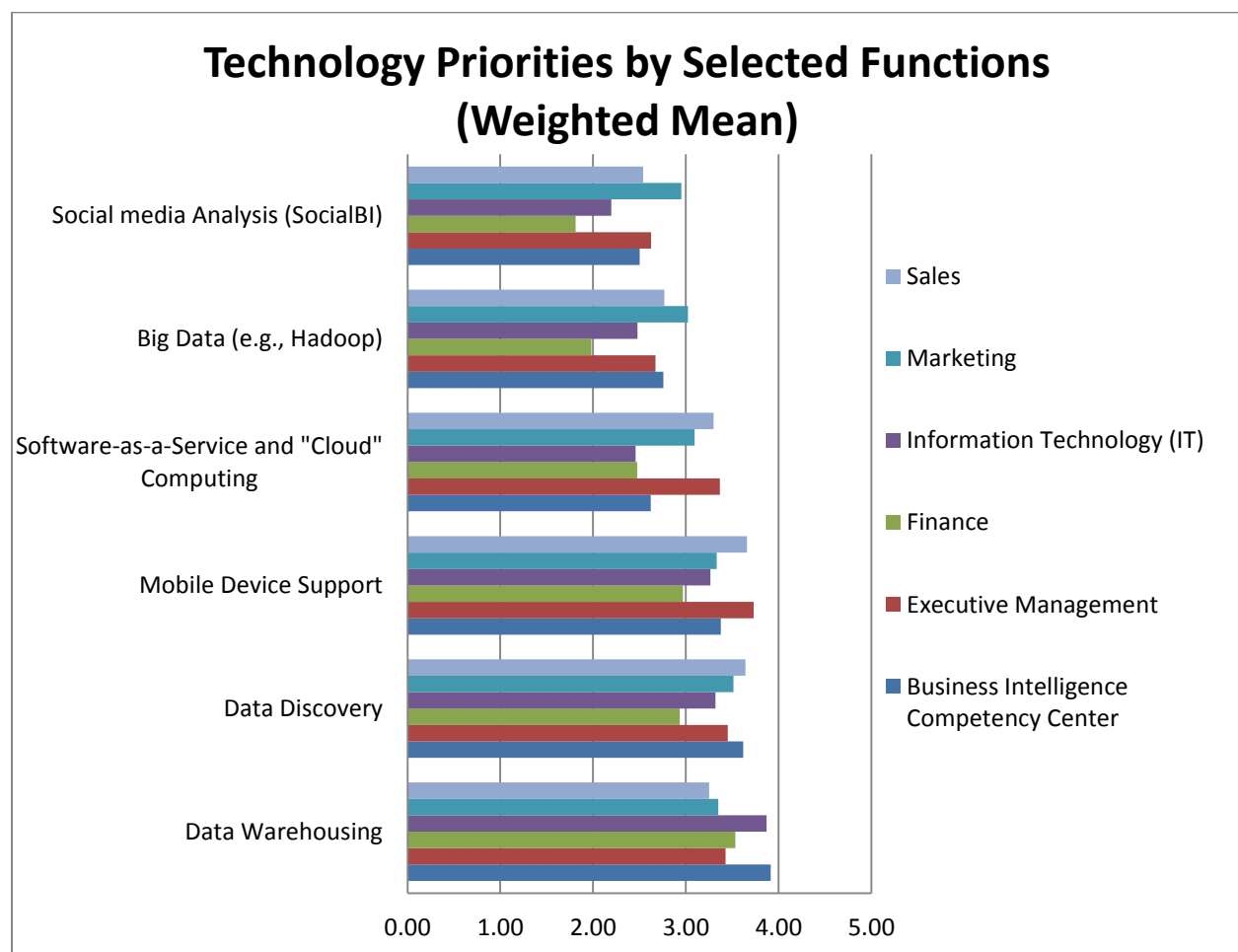
Figure 44 - Technology Priorities by Selected Functions (Weighted Mean)

Industry and Vendor Analysis

Industry and Vendor Analysis:

In this section we will 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 six 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 vendor is Recommended.

Industry Performance

Sales/Acquisition Experience

Last year industry scores for "Sales/Acquisition Experience" declined (Figure 45). We attributed this to an influx of new sales personnel and as expected there has been improvement in 2013.
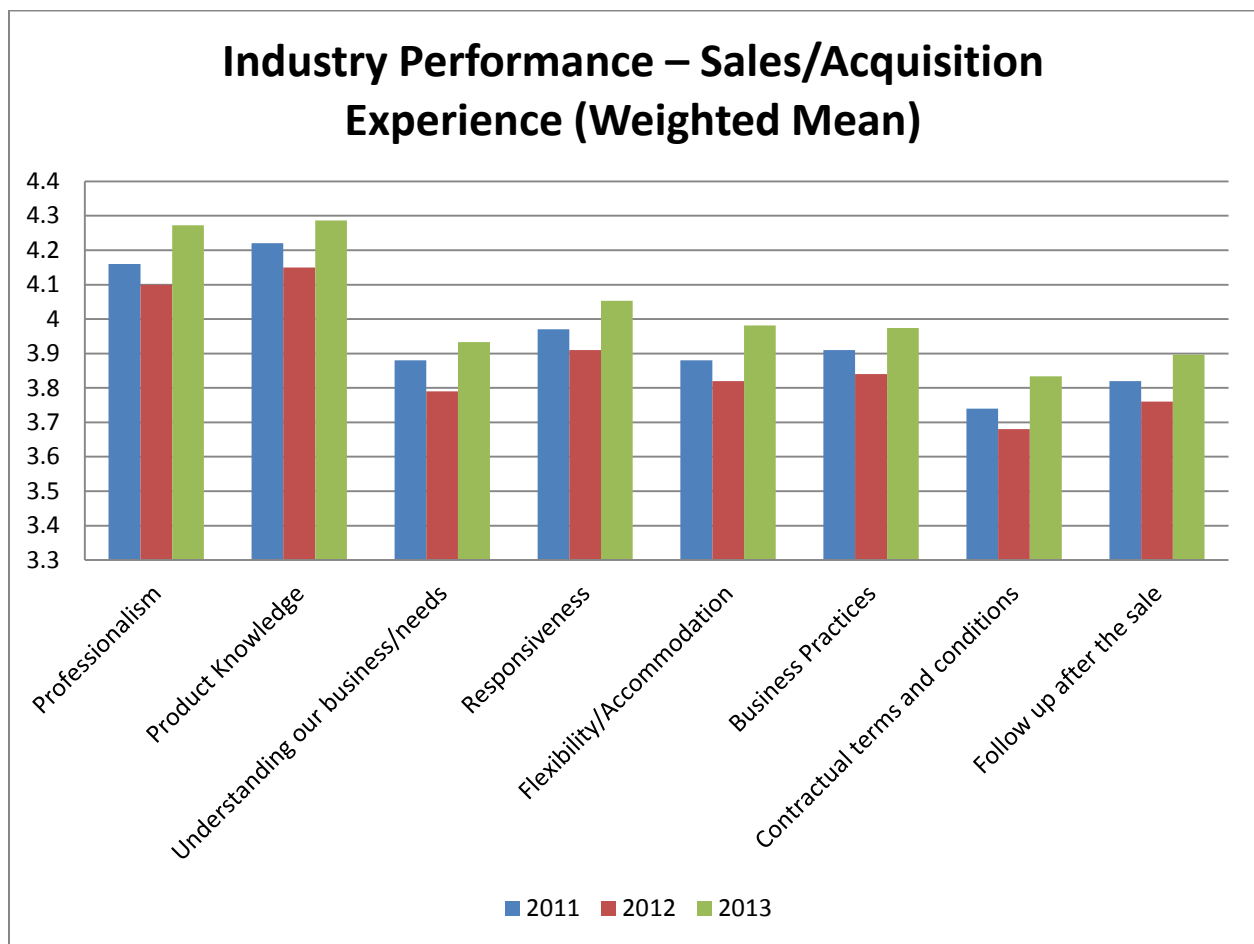
Figure 45 – Industry Performance – Sales/Acquisition Experience (Weighted Mean)

Value

For the Value dimension, we compared current user responses with those from 2011 and 2012. Already a relatively high score, it has remained fairly stable for the past three years (Figure 46).
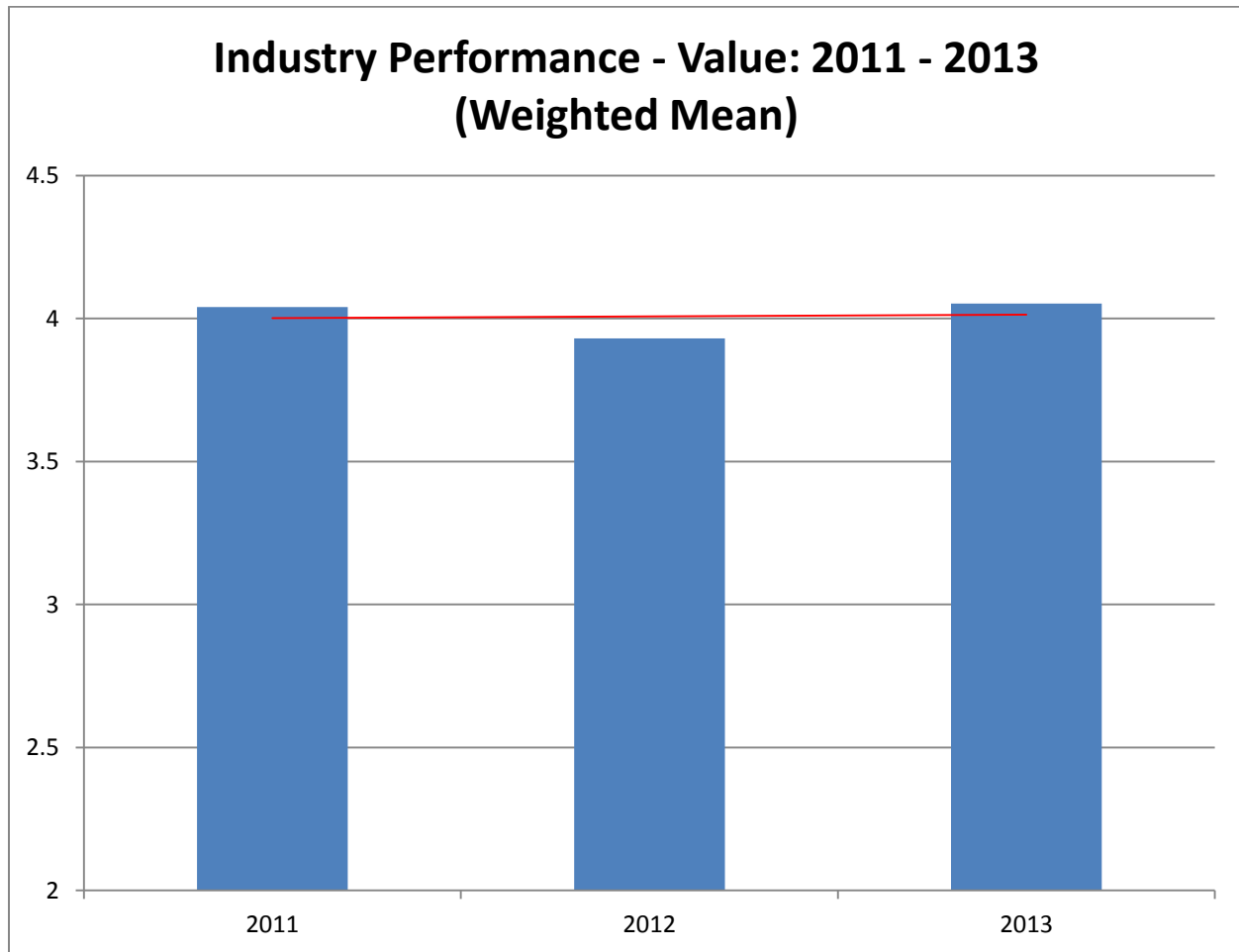
Figure 46 - Industry Performance - Value: 2011 - 2013 (Weighted Mean)

Quality and Usefulness of Product

Taking a look at industry performance related to product (Figure 47), we saw improvements in the key areas of: Robustness, Completeness, Ease of Installation and Ease of Administration over 2012. Integration with 3rd party technologies continues to be an issue, consistently receiving a low score since 2010. Online training, forums and documentation declined from 2012. We believe that this is largely due to heightened expectations not a decrease in capability.
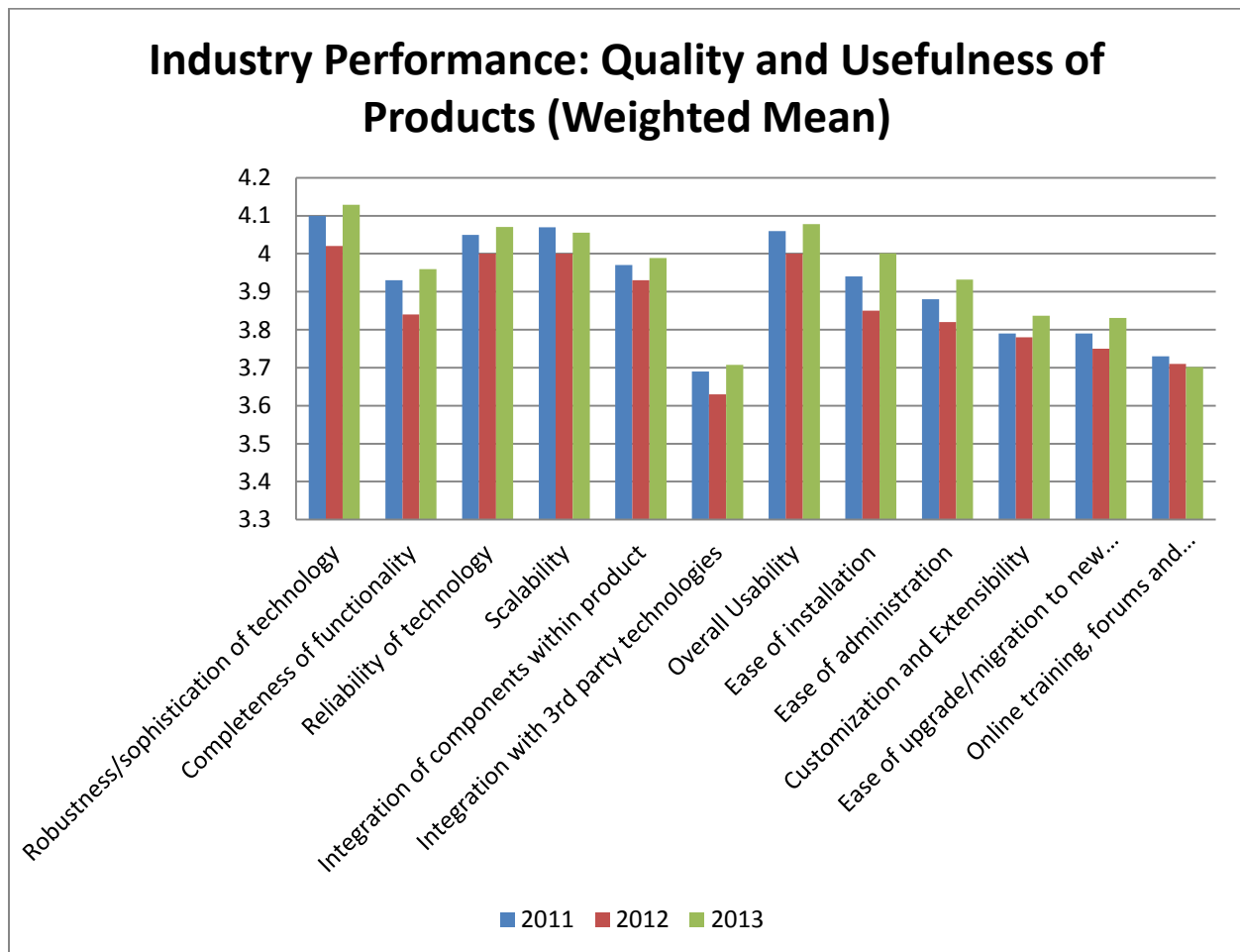
Figure 47 - Industry Performance: Quality and Usefulness of Products (Weighted Mean)

Technical Support

2013 continues the important trend towards improved technical support (Figure 48). All five metrics have increased – at an industry level – over 2012 and 2011. In particular, we were pleased to see a sharp improvement in Continuity of personnel and Time to resolve problems!
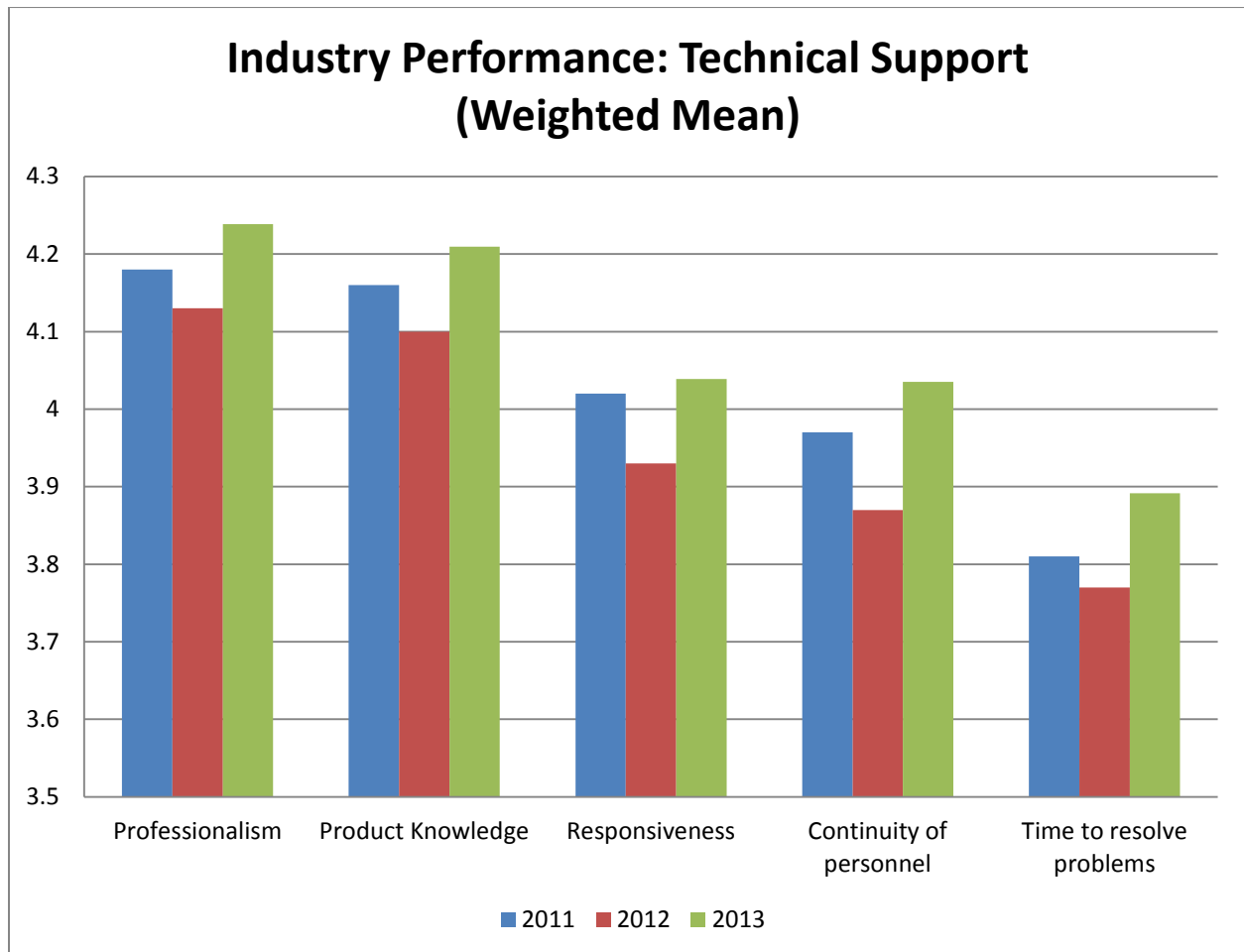
Figure 48 - Industry Performance: Technical Support (Weighted Mean)

Consulting

Industry perception for BI software vendor consulting services improved substantially over 2012 and 2011, with all measures showing increased performance – including Value (Figure 49). This is an important and positive shift as vendors work to better ensure customer success – which will lead to greater customer satisfaction, value and - ultimately- increased penetration.
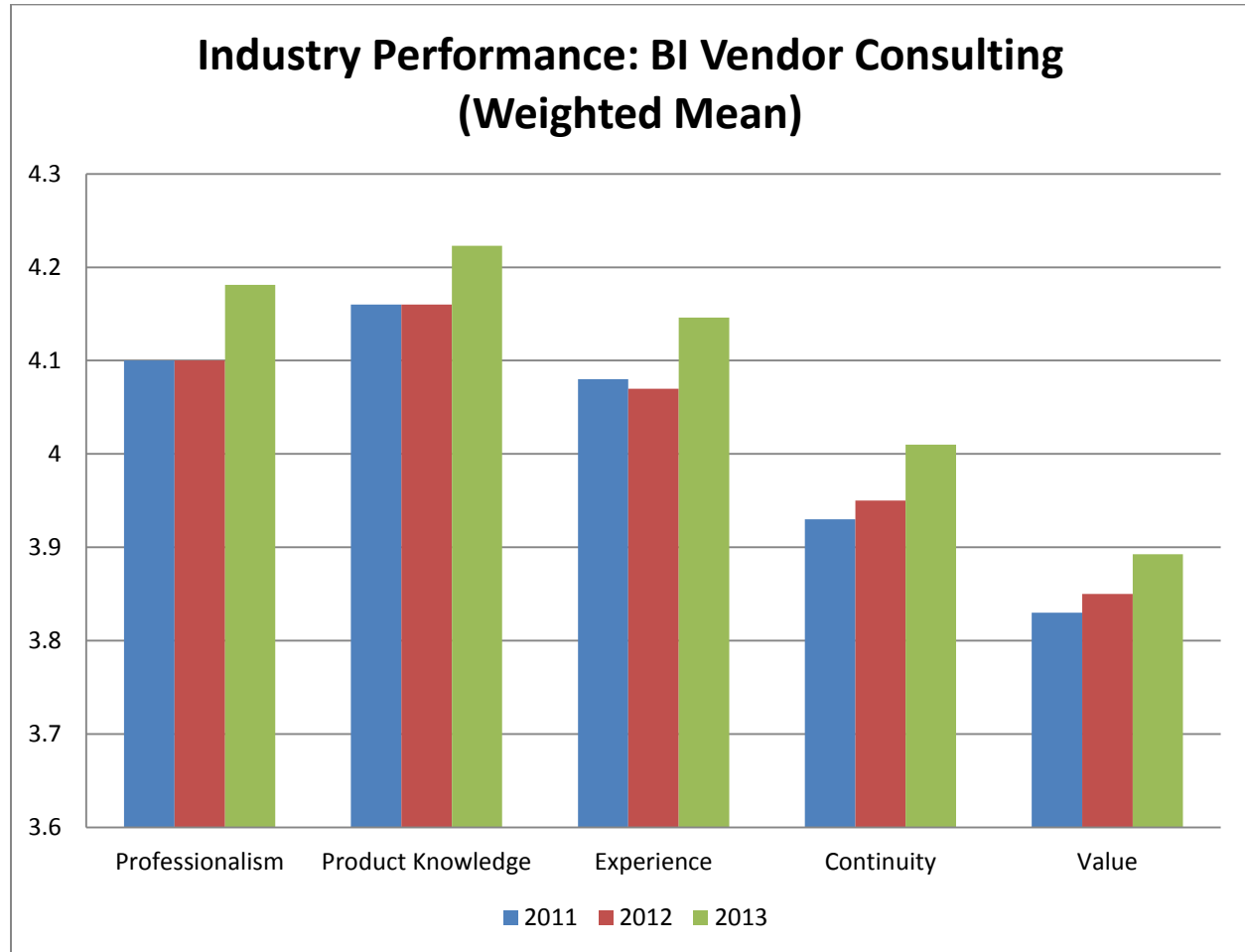
Figure 49 - Industry Performance: BI Vendor Consulting (Weighted Mean)

Recommended

For 2013, respondents were somewhat more likely to recommend their BI software vendor than in 2012 (Figure 50). For 2013, 95% said that they would recommend their vendor versus 92% in 2012.
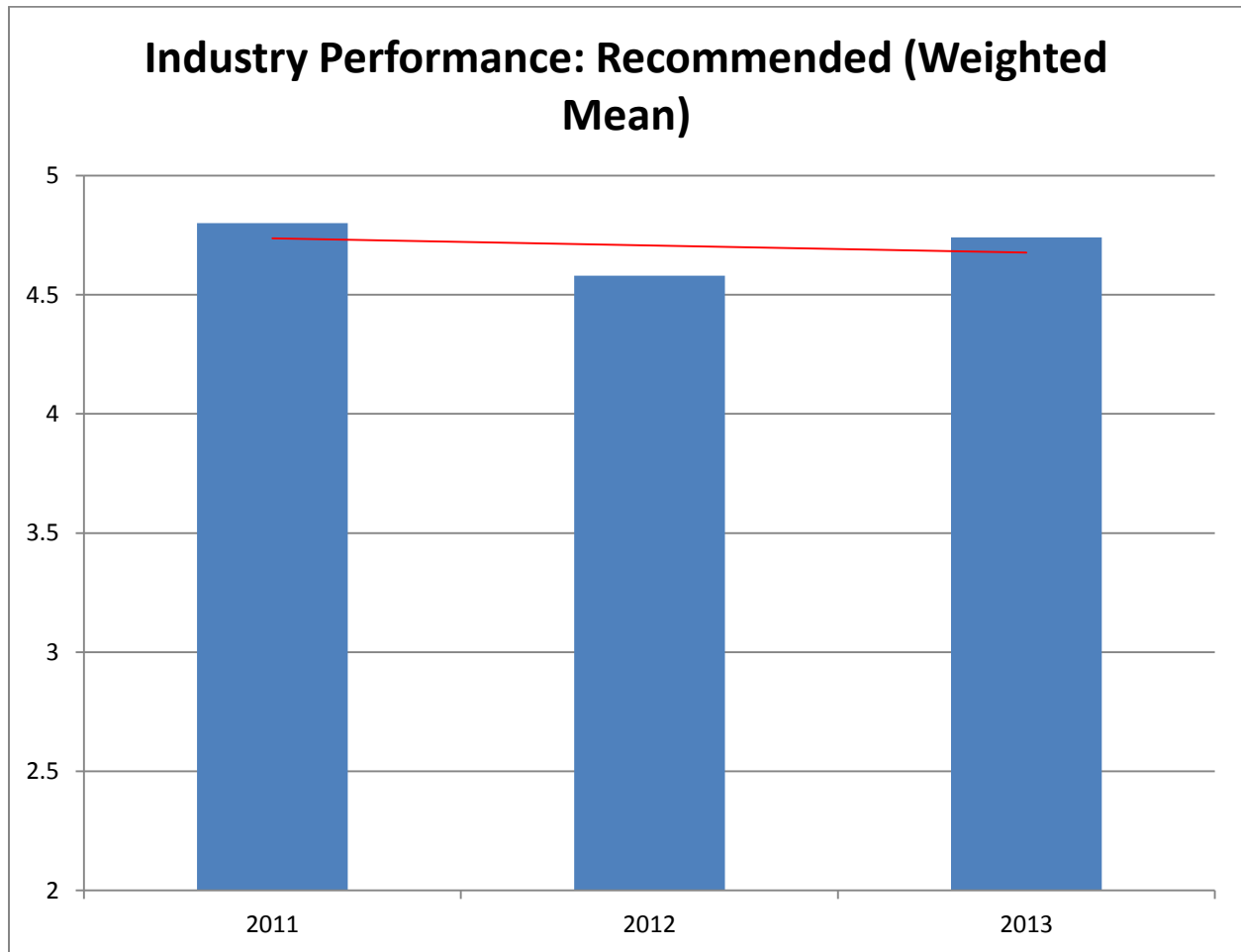
Figure 50 - Industry Performance: Recommended (Weighted Mean)

Integrity

In 2012 we began asking whether respondents believe their vendor demonstrates integrity – honesty and truthfulness – in all their dealings. In 2012, 25% of respondents felt that vendor integrity was "average" or worse. Since then, this has improved to 16% (Figure 51).
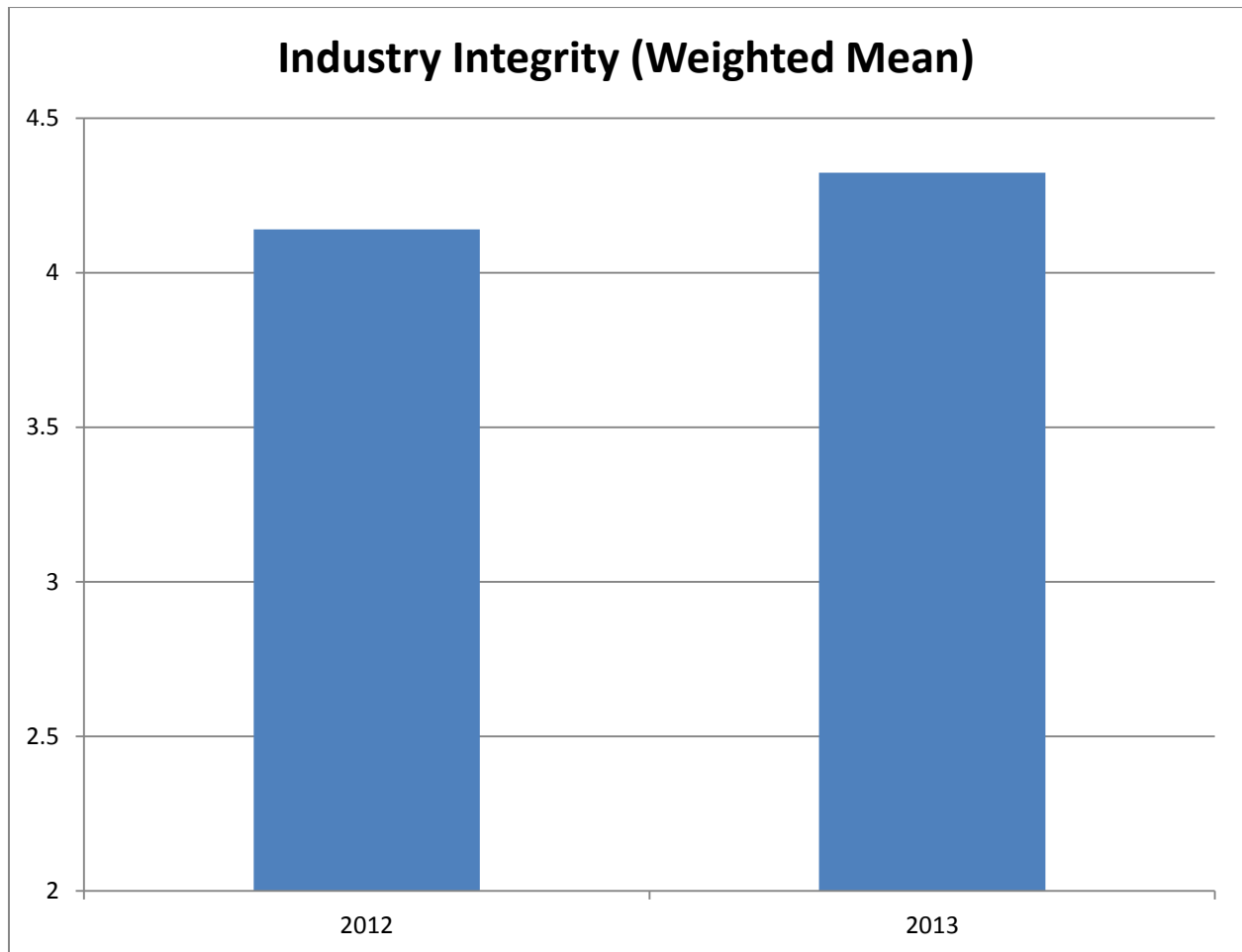
Figure 51 - Industry Integrity (Weighted Mean)

Vendor Rankings

Vendor Stacked Rankings:

In this section we offer stacked rankings of Business Intelligence software vendors. Vendors were ranked using 33 different criteria, on a 5-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 vendor is recommended (1) and Integrity (1). The result is a stacked ranking with an average score for every one of the seven categories and an overall average score for each vendor.

As we begin to 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

As in 2012, market segments include the "Titans", "Established Pure-Play", "Emerging" and "High Growth" vendors. For 2013 we have added a "Specialized" category and have also examined what we are calling an "Early Stage" category.

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 categories of criteria.

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 8 items, while "Value" for price is 1 single 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: IBM/Cognos, Microsoft, Oracle and SAP/BusinessObjects. And, for 2013, we have added Infor.

Table 1 - Business Intelligence Titans - Stacked Rankings

Vendor	Sales Avg	Value	Product	Support	Consult	Integrity	Recommend	Final Score
Infor	3.64	3.67	3.46	3.72	3.89	4.00	4.76	3.88
Microsoft	3.52	3.72	3.72	3.64	3.65	3.90	4.65	3.83
IBM	3.52	3.33	3.61	3.52	3.63	3.82	4.08	3.64
Oracle	3.42	3.26	3.45	3.48	3.45	3.61	4.12	3.54
SAP/ BusinessObjects	3.25	3.15	3.23	3.25	3.35	3.59	4.12	3.42

Large Established Pure-Play Business Intelligence Vendors

 "Large Established Pure-Play" vendors (Table 2) are focused primarily upon Business Intelligence software and services and have typically been in business for 15 + years - with well-established customer bases and revenue streams. Several are publicly held. These include Information Builders, Actuate, The SAS Institute and MicroStrategy. For 2013, we have moved QlikTech to this category from High Growth.

Table 2 - Business Intelligence Established Pure-Play - Stacked Rankings

Vendor	Sales Avg	Value	Product	Support	Consult	Integrity	Recommend	Final Score
Information Builders	4.48	4.35	4.26	4.51	4.60	4.74	5.00	4.56
Actuate	3.94	4.11	4.05	4.28	4.20	4.18	4.62	4.20
QlikTech	3.89	4.22	4.18	3.92	3.98	4.27	4.90	4.19
SAS Institute	3.93	3.95	3.74	4.02	3.78	4.30	4.40	4.02
MicroStrategy	3.60	3.61	3.78	3.71	3.68	3.91	4.56	3.83

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 includes Tableau and Tibco Spotfire. And for 2013, we have moved Pentaho (from Emerging) and have added Logi Analytics to this category.

Table 3 - High Growth Business Intelligence Vendors – Stacked Rankings

	Sales	Value	Product	Support	Consult	Integrity	Recommend	Final Score
Tableau	4.14	4.40	4.32	4.21	4.21	4.59	4.90	4.40
Tibco Spotfire	4.22	4.20	4.10	4.20	4.22	4.45	5.00	4.34
Pentaho	4.12	4.39	3.68	4.25	4.24	4.32	4.86	4.26
Logi Analytics	4.03	4.00	3.96	4.06	3.96	4.23	4.73	4.14

Specialized Business Intelligence Vendors

"Specialized" Business Intelligence vendors (Table 4) are those 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. Dimensional Insight is included in this segment as are newcomers Phocas, Dundas and Panopticon.

Table 4 - Business Intelligence Specialized Vendors – Stacked Rankings

Vendor	Sales	Value	Product	Support	Consult	Integrity	Recommend	Final Score
Dimensional Insight	4.59	4.52	4.29	4.61	4.71	4.83	4.90	4.64
Phocas	4.20	4.37	3.97	4.08	4.40	4.63	5.00	4.38
Dundas	4.28	4.21	4.10	4.39	4.31	4.56	4.76	4.37
Panopticon	4.30	3.95	4.16	4.21	4.09	4.60	5.00	4.33

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: Yellowfin, Birst (new for 2013), iDashboards (new for 2013), Jedox and Jaspersoft.

Table 5 - Business Intelligence Emerging Vendors – Stacked Rankings

Vendor	Sales Avg	Value	Product	Support	Consult	Integrity	Recommend	Final Score
Yellowfin	4.63	4.78	4.44	4.71	4.70	4.90	5.00	4.74
Birst	4.41	4.26	4.09	4.43	4.40	4.57	4.85	4.43
iDashboards	4.29	3.98	3.91	4.32	4.24	4.42	4.92	4.30
Jedox	4.07	4.21	4.03	4.28	4.04	4.38	4.86	4.27
Jaspersoft	3.78	4.15	3.84	3.79	3.99	4.23	4.74	4.07

Early Stage Business Intelligence Vendors

This year we reached out to include a wide array of vendors in an attempt to recognize the growing number of suppliers in the market – many of them very young and small and still somewhat embryonic in nature. Although not ranked in this report, we will continue to watch them for progress over the course of the next year. Included on this watch list are: Advizor Solutions, Klipfolio, SpagoBI and Yurbi.

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, 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 have adding "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 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 3rd 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 52 – Actuate/BIRT Detailed Score

A member of the "Large Established Pure-Play" category, Actuate increased performance across virtually all measures compared to 2012. It exceeded Peer and Overall scores for most measures across Sales, Value, Product, Technical Support, and Consulting.

Actuate was also "best in class" for Product: Reliability of technology and Customization and Extensibility.

Birst Detailed Score
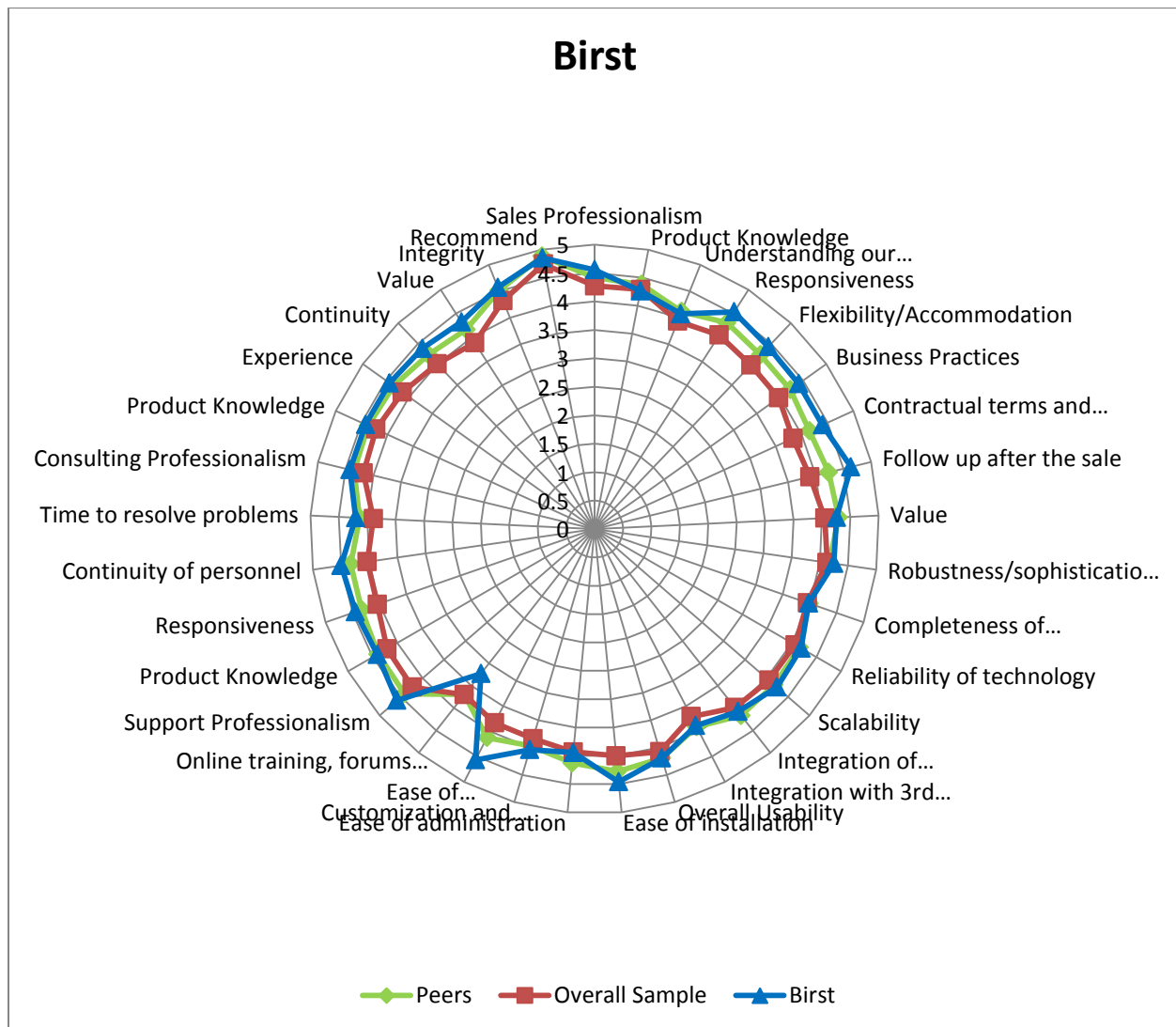
Figure 53 – Birst Detailed Score

A first time entry in the "Emerging" segment, Birst was generally above peer and overall sample averages for most measures. It was "best in class" for Sales: Responsiveness and Follow up after the sale, and Product: Ease of upgrade/migration to new versions.

Dimensional Insight Detailed Score
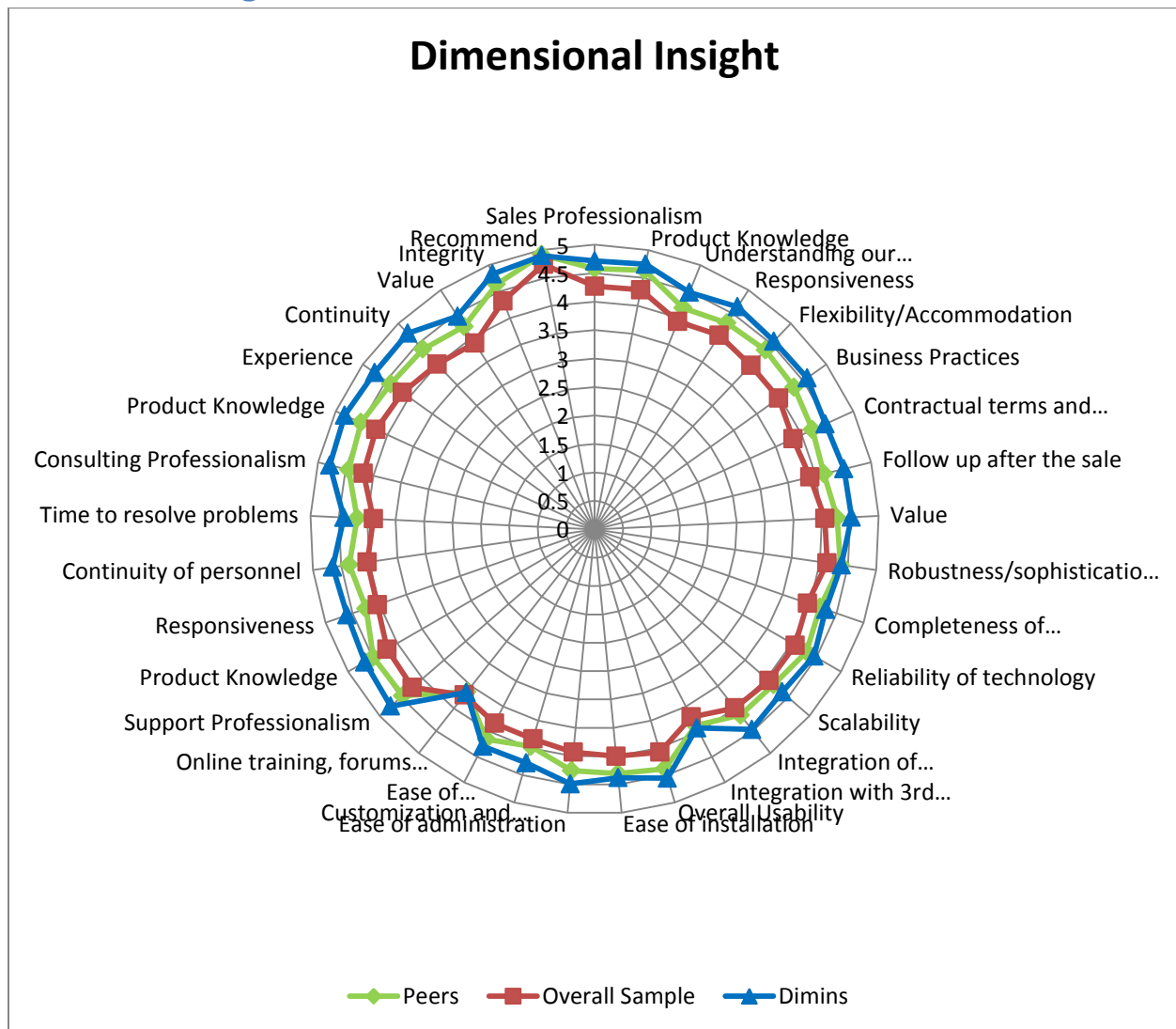
Figure 54 – Dimensional Insight Detailed Score

A member of the "Specialized" market segment, Dimensional Insight is its leader. It improved its performance in virtually every category versus 2012 and was "best in class" for virtually all measures in all categories including: Sales, Value, Product, Technical Support, Consulting and Integrity.

Dundas Detailed Score
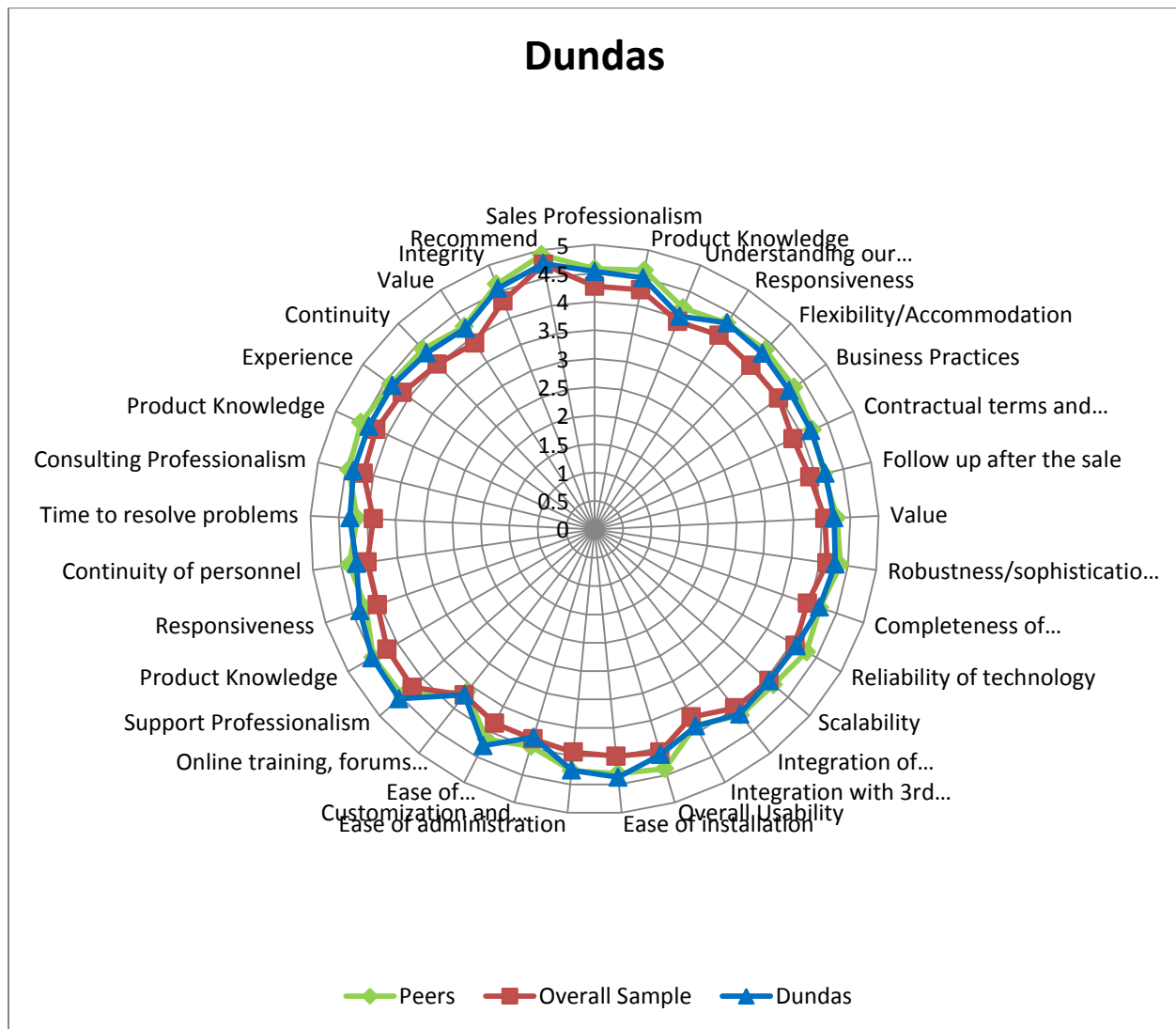
Figure 55 – Dundas Detailed Score

Dundas is a new entrant into the "Specialized" market segment. It was generally in line with peer averages and above overall averages.

IBM Detailed Score
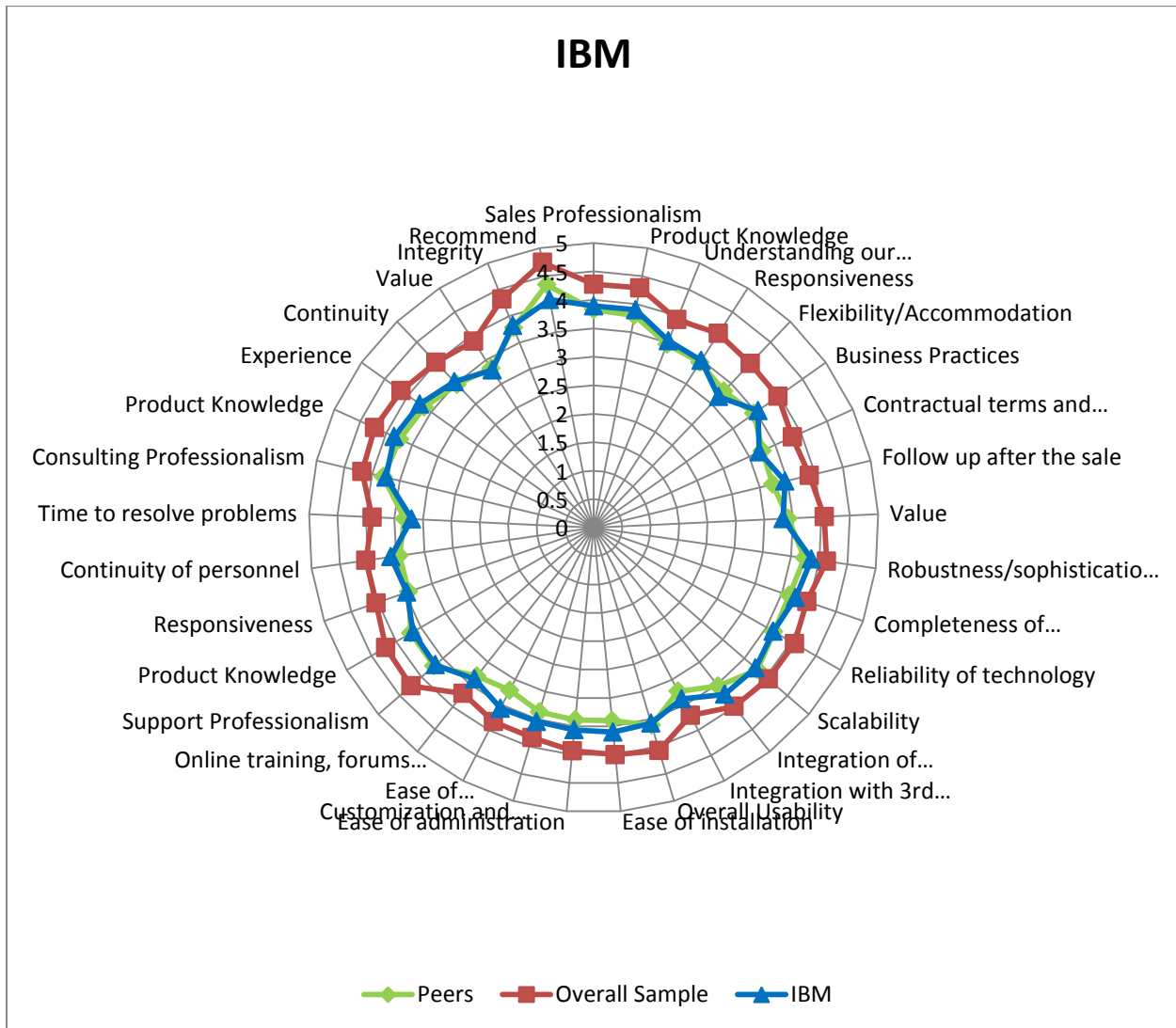
Figure 56 – IBM/Cognos Detailed Ranking

A member of the "Titan" market segment, IBM improved performance across most categories of measurement vs. 2012. It was "best in class" for Follow up after the sale, Product: Robustness/sophistication of technology, Completeness of functionality, and Ease of upgrade/migration to new versions.

iDashboards Detailed Score
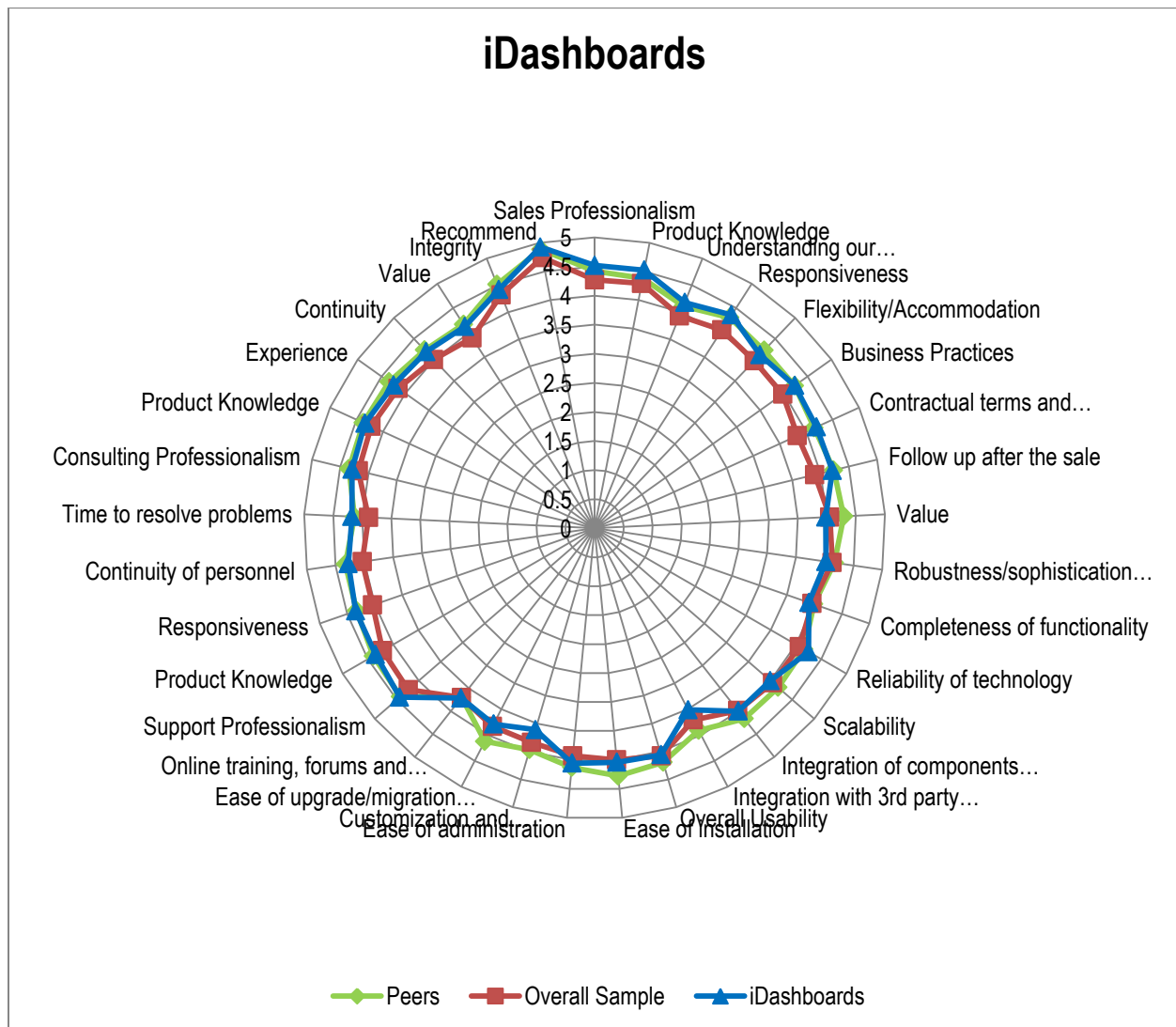
Figure 57 – iDashboards Detailed Score

A new entry in the "Emerging" market segment, iDashboards was generally in line with peers and the overall sample for most measures.

Infor Detailed Score
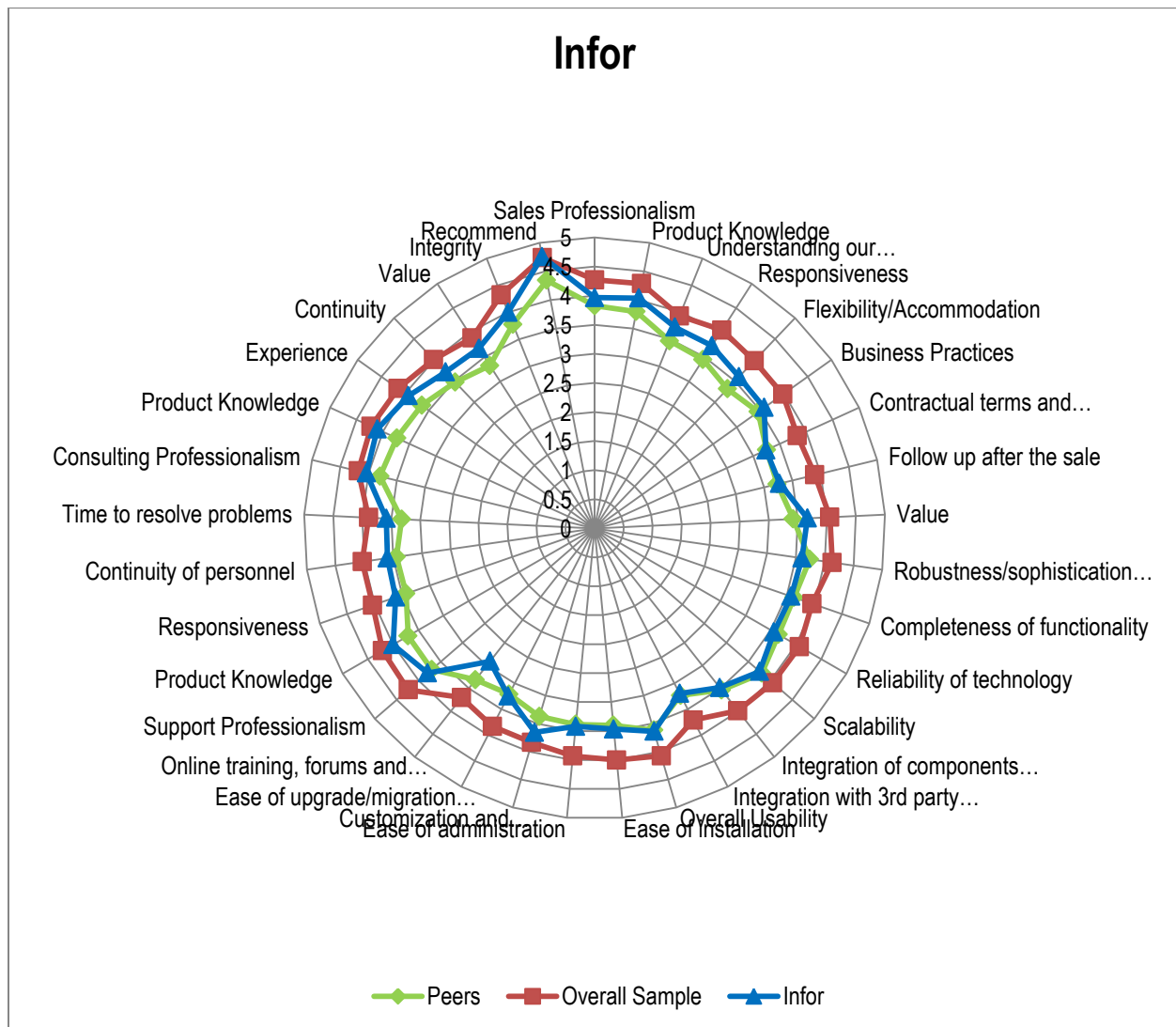
Infor

Figure 58 – Infor Detailed Score

A first time entry in the "Titan" market segment, Infor is positioned as its leader, exceeding peer averages for virtually all measures. It was "best in class" in Sales, Technical Support, Consulting, Integrity, and Recommended categories.

Information Builders Detailed Score
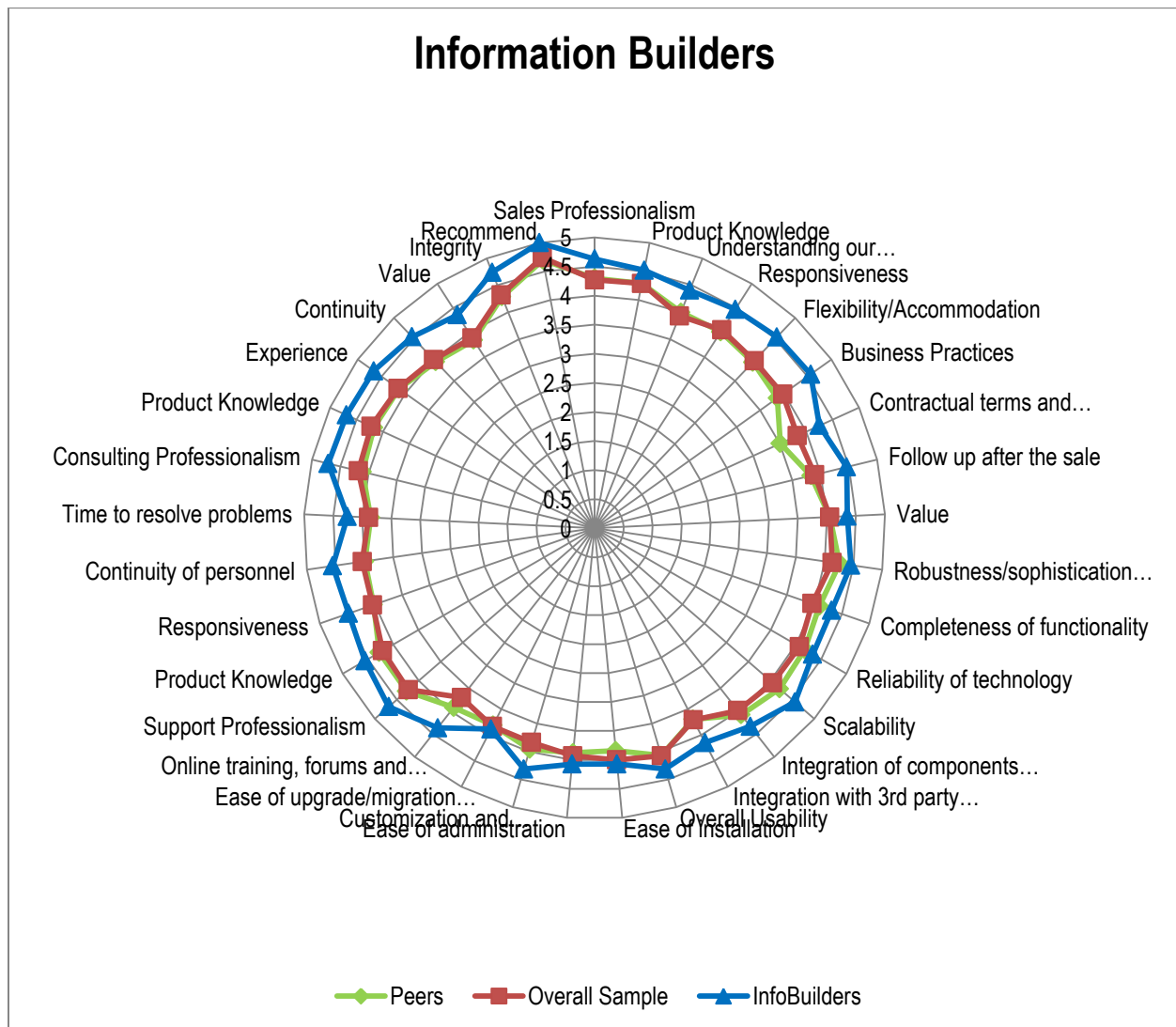
Figure 59 – Information Builders Detailed Score

A member of the "Large Established Pure-Play" market segment, Information Builders leads the segment for a fourth year in a row. It increased performance across all measures vs. 2012 and was "best in class" exceeding peer and overall averages for virtually every measures. It had a perfect Recommend score.

Jaspersoft Detailed Score
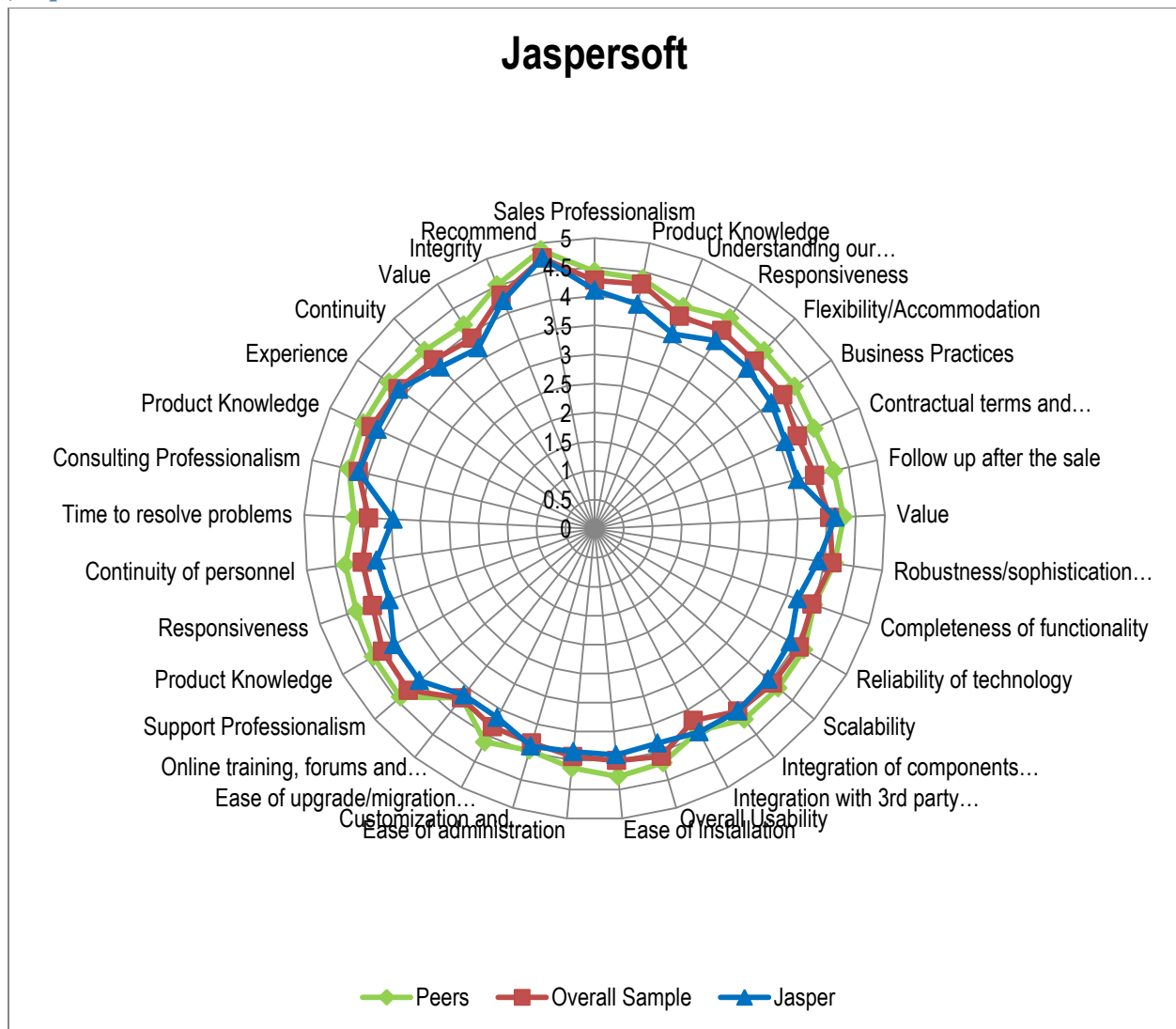
Figure 60 – Jaspersoft Detailed Score

A member of the "Emerging" market segment, Jaspersoft increased performance across virtually all categories vs. 2012. This includes Sales, Product, Technical Support, Consulting, Integrity and Recommended.

Jedox Detailed Score
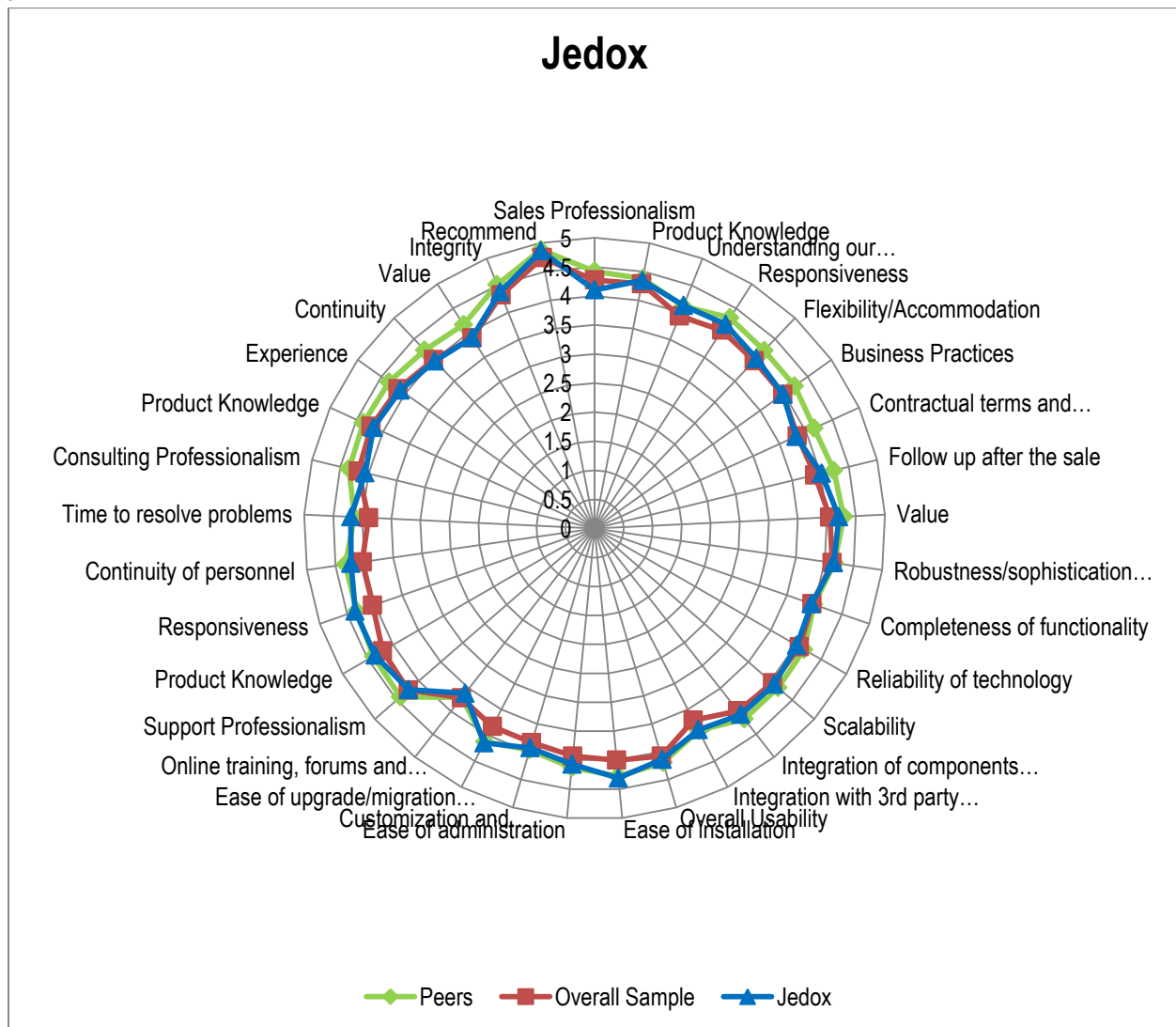
Jedox

Figure 61 – Jedox/Palo Detailed Score

A member of the "Emerging" market segment, Jedox was generally in line with or below peer averages.

Logi Analytics Detailed Score
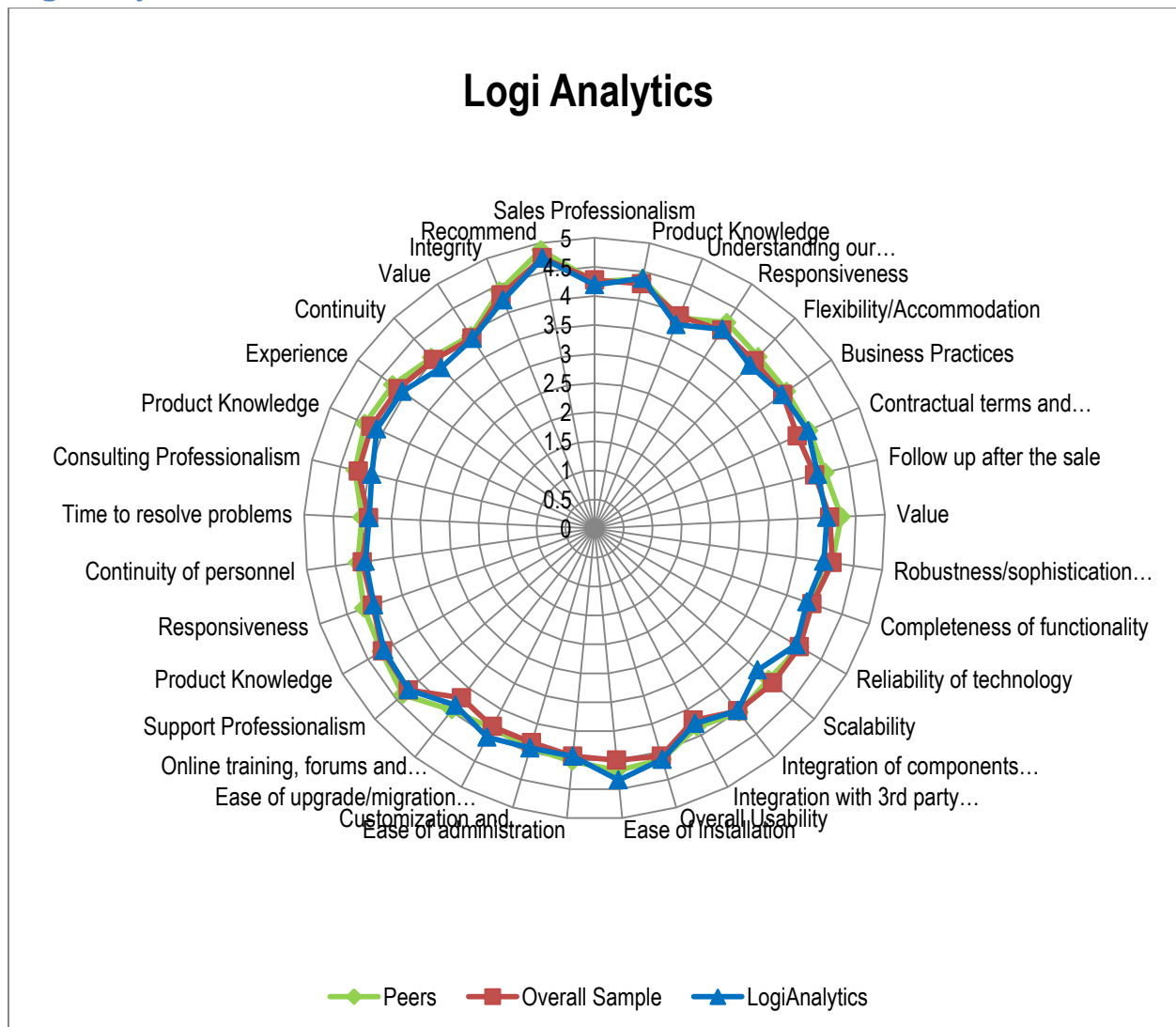
Figure 62 – Logi Analytics Detailed Score

A new entry in the "High Growth" market segment, Logi Analytics was generally in line with peer and overall averages for most measures.

Microsoft Detailed Score
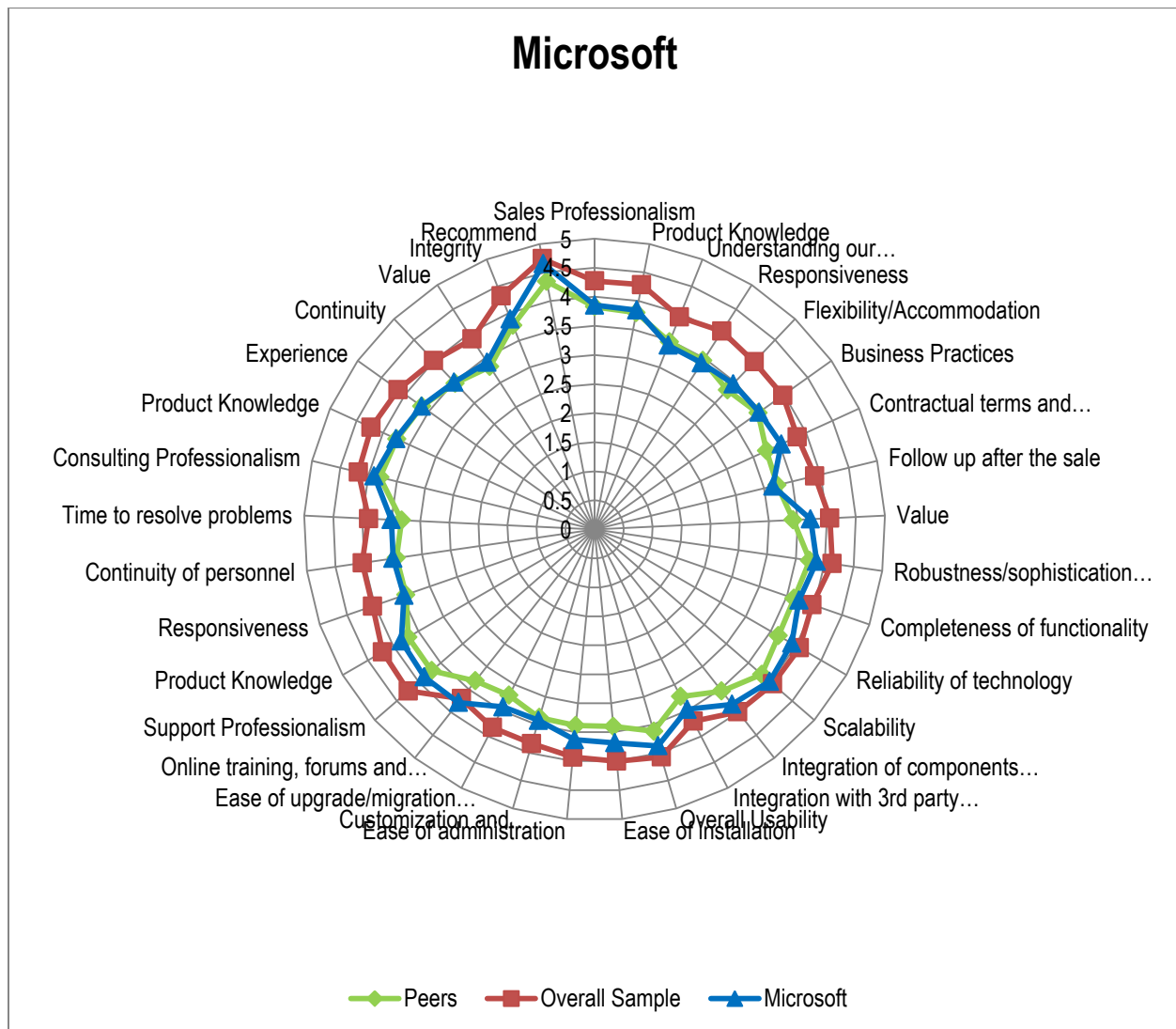
Figure 63 – Microsoft Detailed Score

A member of the "Titan" market segment, Microsoft improved its scores for most measures vs. 2012. It was in line with or above its peer group for most measures.

MicroStrategy Detailed Score
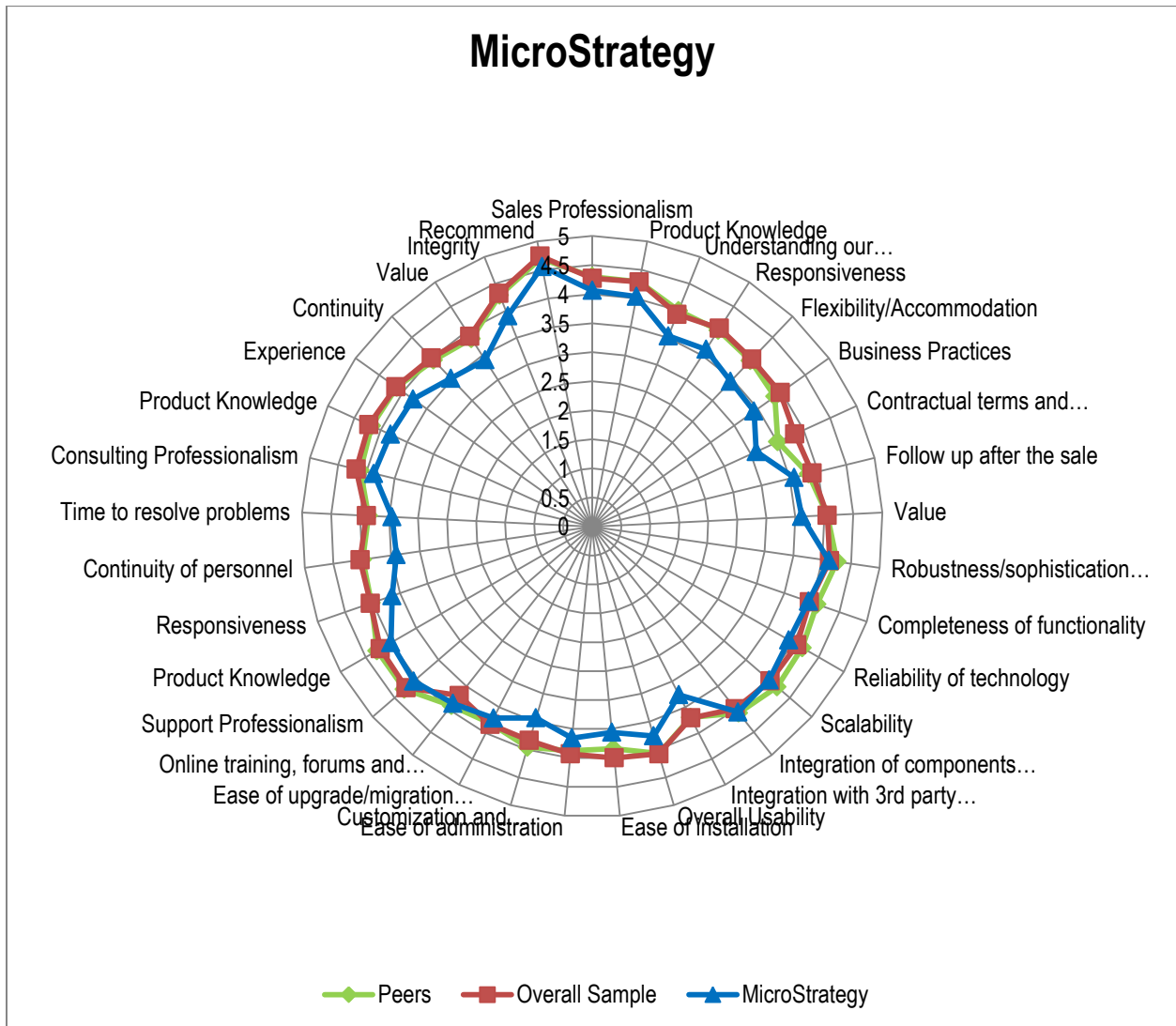
Figure 64 – MicroStrategy Detailed Score

A member of the "Large Established Pure-Play" market segment, MicroStrategy scored below its peer group for most measures. It exceeded overall sample averages for Product: Integration of components within product and Online training, forums and documentation.

Oracle Detailed Score
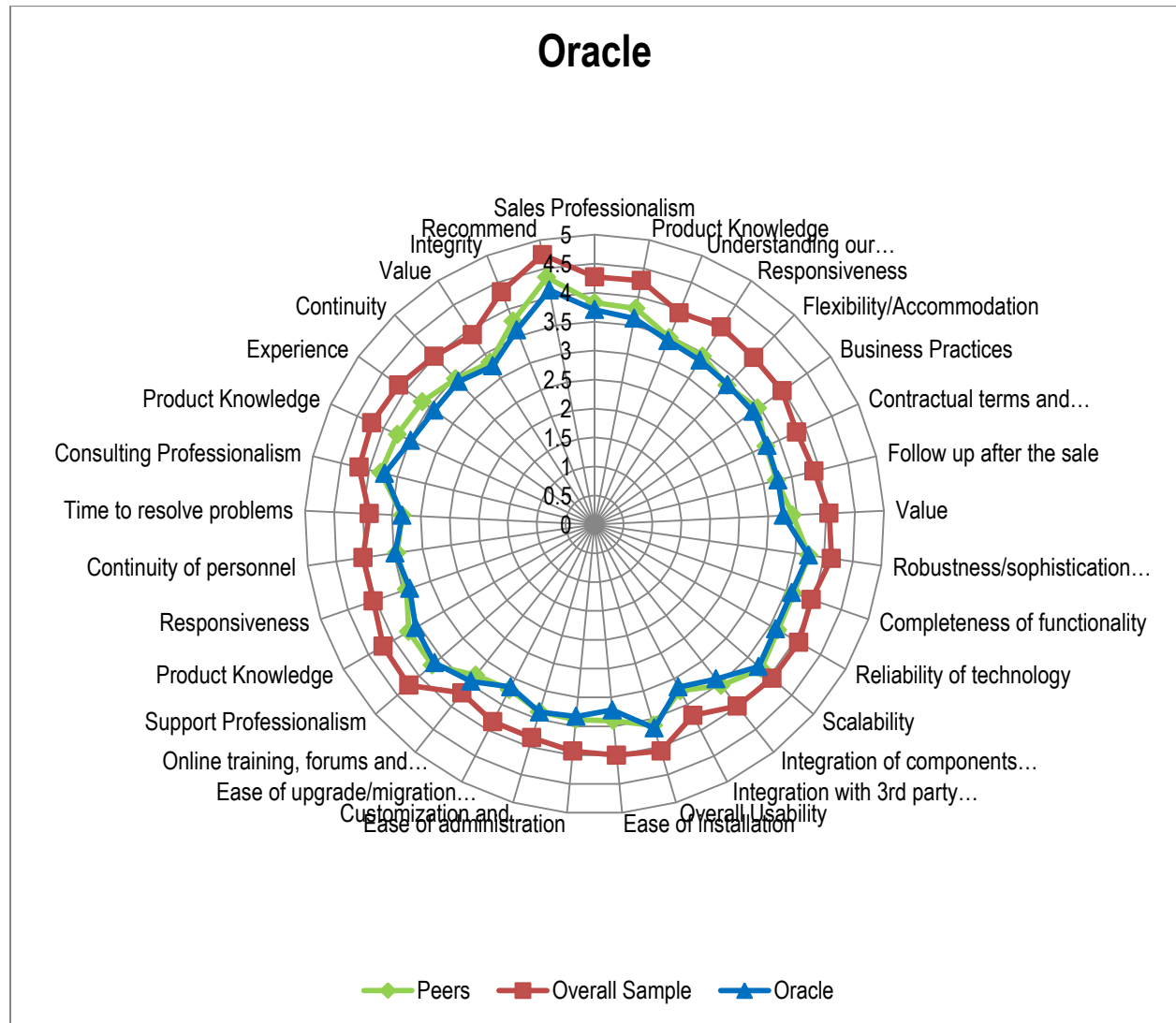
Figure 65 – Oracle Detailed Score

A member of the "Titan" market segment, Oracle was generally in line with its peer group. It increased performance in most measurement categories vs. 2012 – including Sales, Value, Product, Technical Support, Integrity and Recommended.

Panopticon Detailed Score
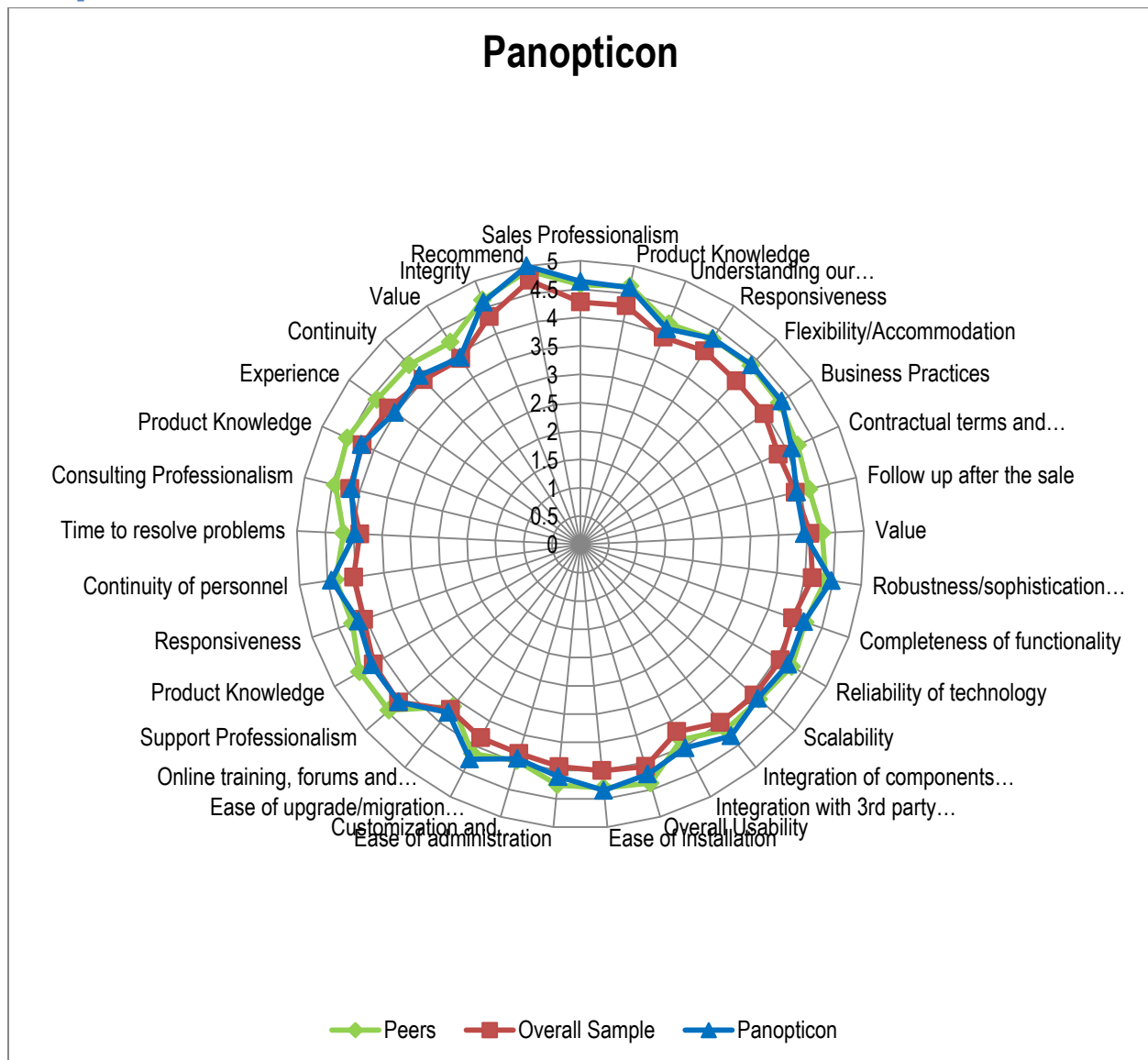
Figure 66 – Panopticon Detailed Score

A new entry in the "Specialized" market segment, Panopticon was generally in line with or below peer averages. It was "best in class" for Product: Robustness/sophistication of technology, Integration with 3rd party technologies, Online training, forums and documentation, and had a perfect Recommend score

Pentaho Detailed Score
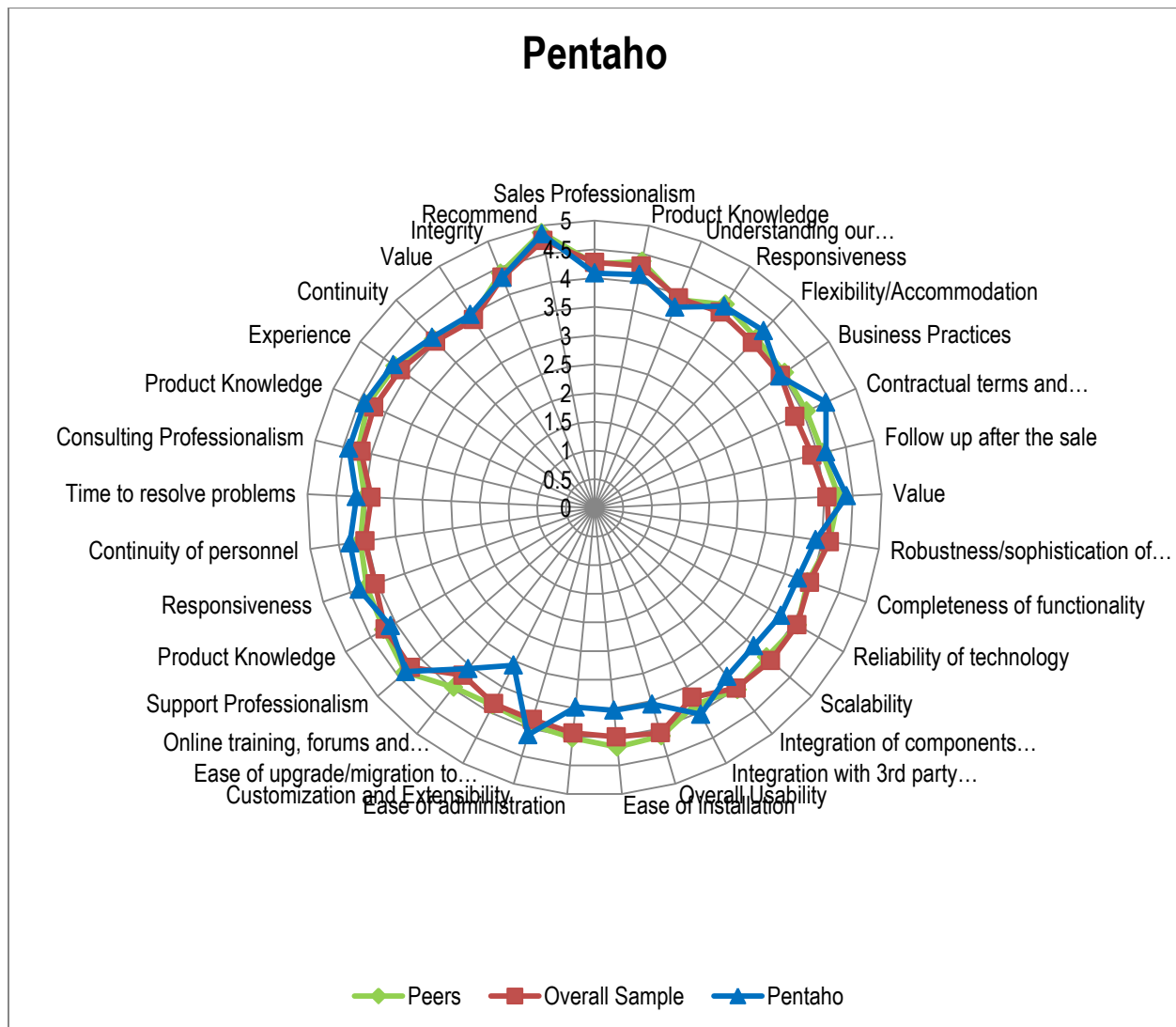
Figure 67 – Pentaho Detailed Score

Moving from the "Emerging" market segment, to the High Growth segment for 2013, Pentaho increased performance across all measures vs. 2012 and was "best in class" for Sales: Flexibility/Accommodation, Contractual terms and conditions and Follow up after the sale; Product: Integration with 3rd party technologies, Customization and Extensibility; Technical support: Continuity of personnel and Time to resolve problems; and Consulting: Continuity of personnel and Value.

Phocas Detailed Score
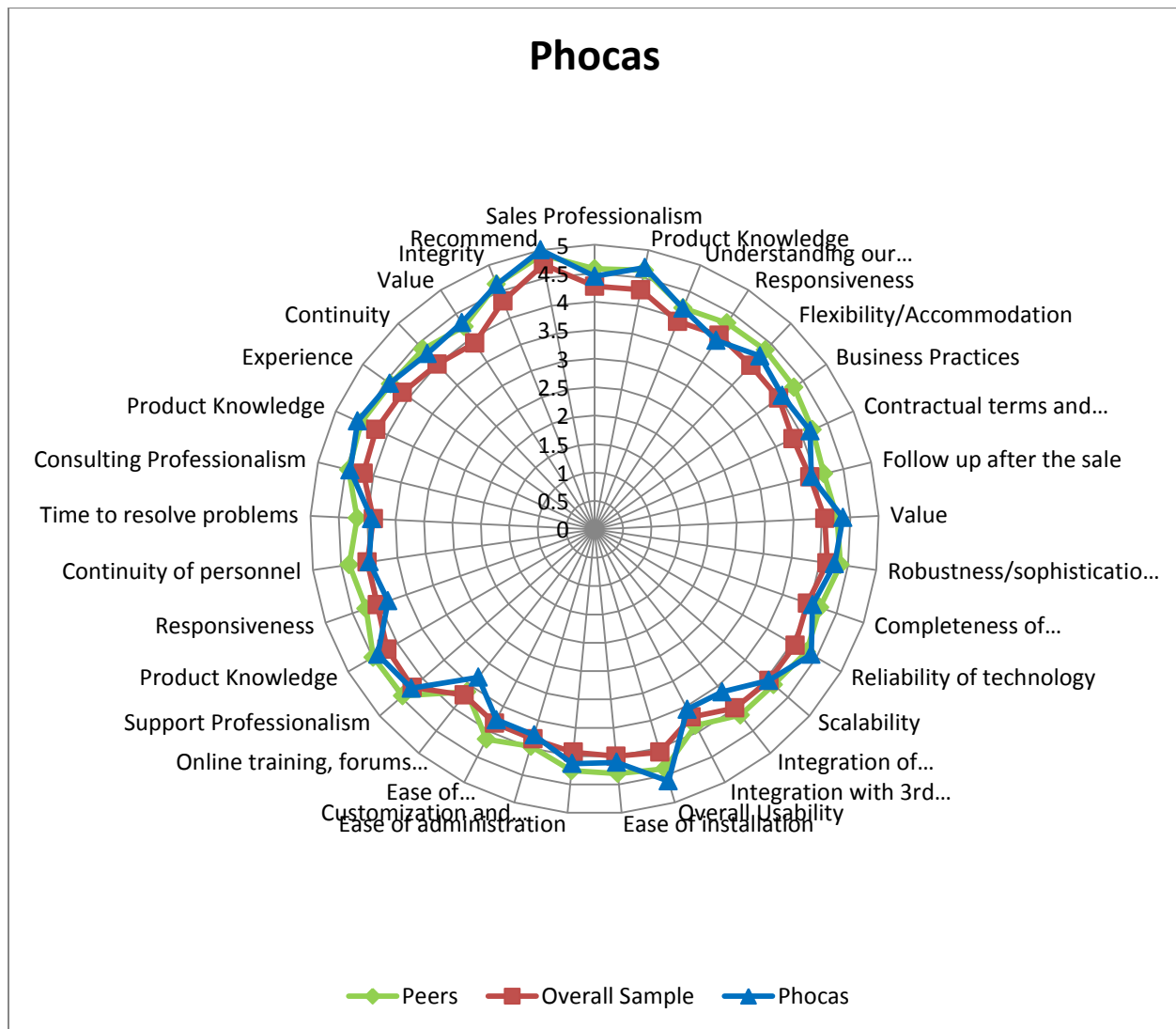
Figure 68 – Phocas Detailed Score

Phocas is a new entry in the "Specialized" market segment for 2013 and was generally in line with or below peer and overall averages. It was "best in class" for Product: Overall Usability and had a perfect Recommended score.

QlikTech Detailed Score
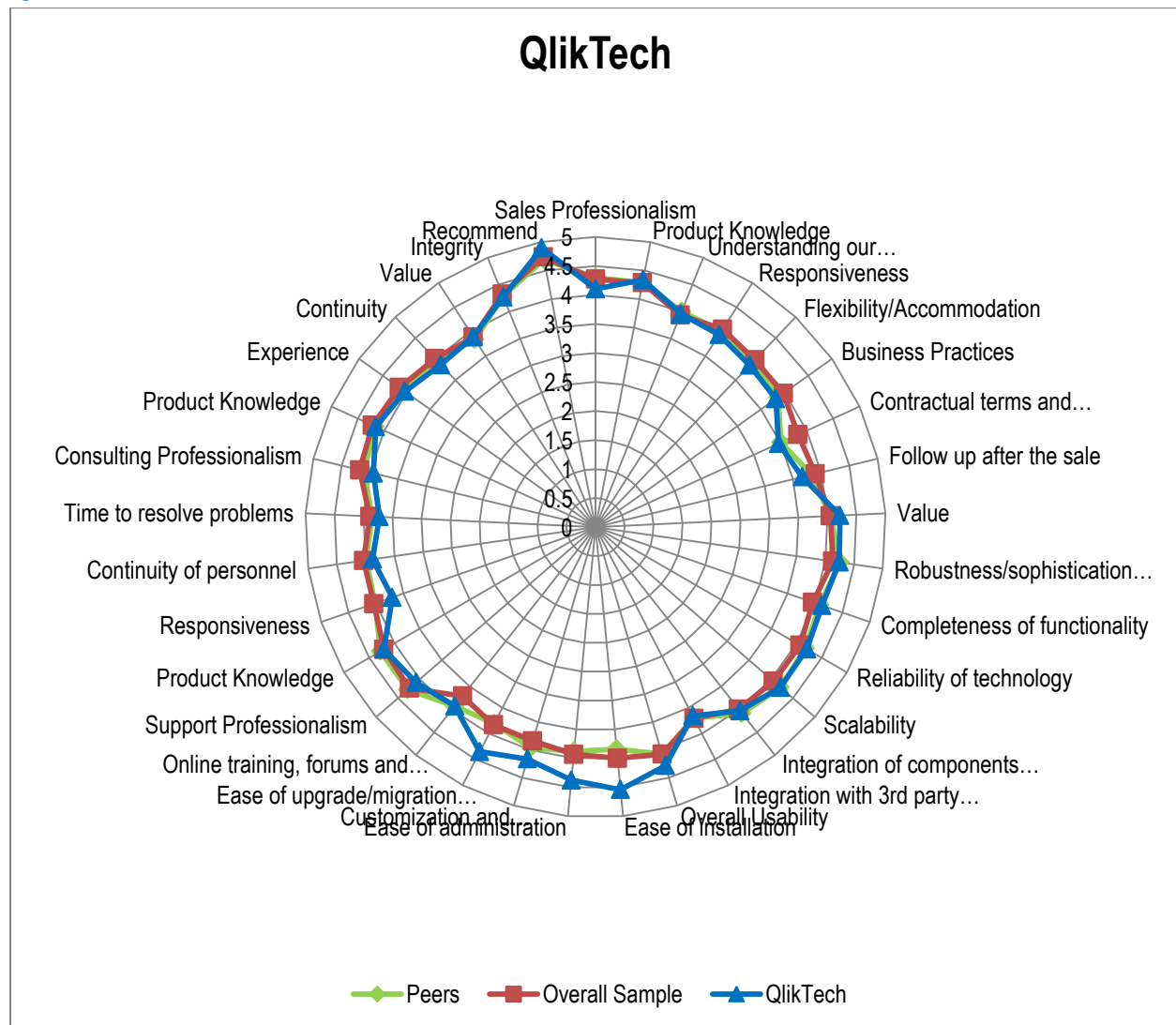
Figure 69 – QlikTech Detailed Score

A member of the "Large Established Pure Play" market segment QlikTech increased its performance in most categories vs. 2012 including: Product, Support, Consulting, Integrity, and Recommended. It was "best in class" for Product: Ease of installation, Ease of administration and Ease of upgrade.

SAP/BusinessObjects Detailed Score
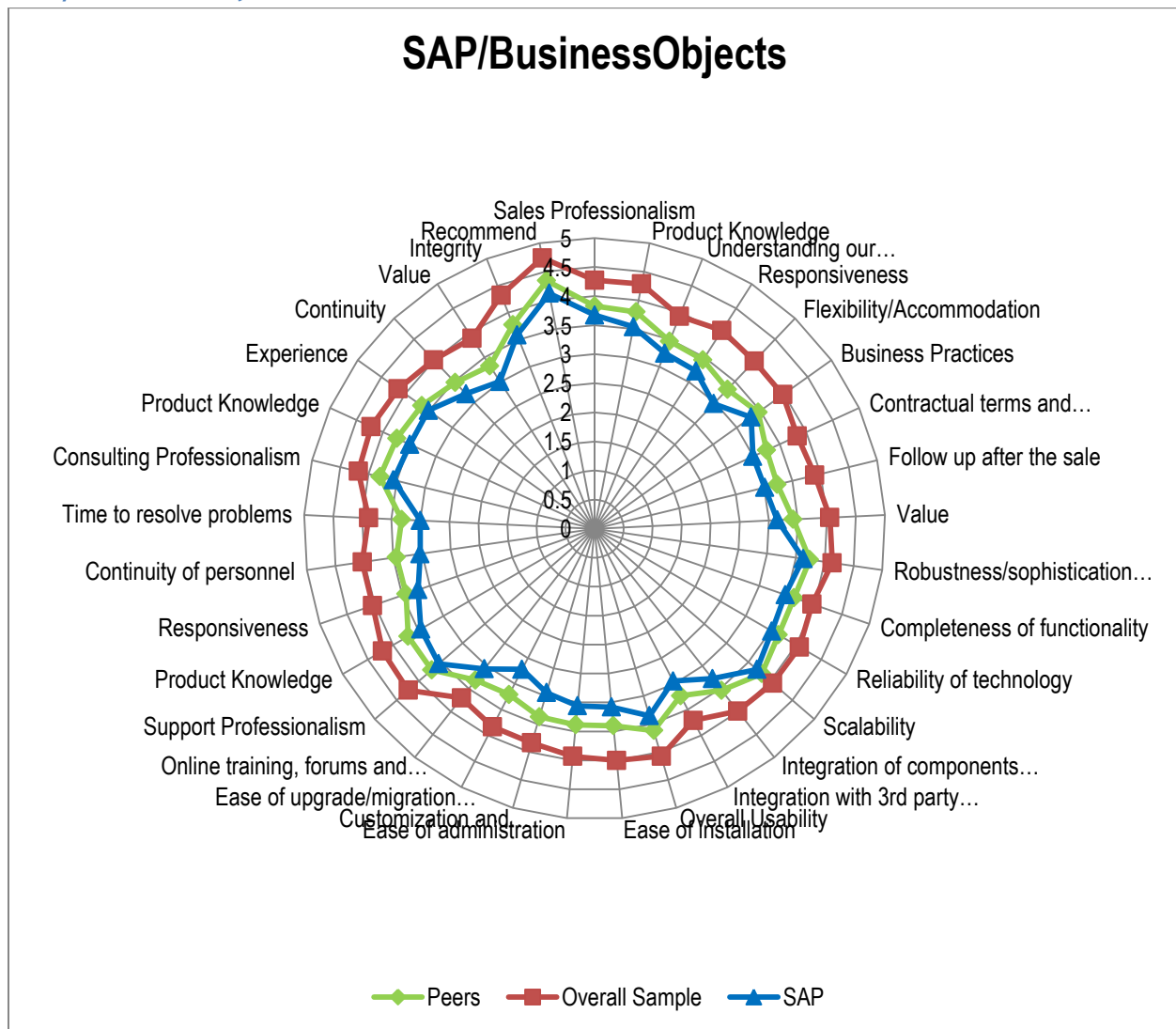
Figure 70 – SAP BusinessObjects Detailed Score

A member of the "Titan" market segment, for 2013, SAP/BusinessObjects increased performance across most categories of measurement and Overall vs. 2012 – including Sales, Technical Support, Integrity and Recommended. It was generally in line with or below peer averages.

SAS Institute Detailed Score
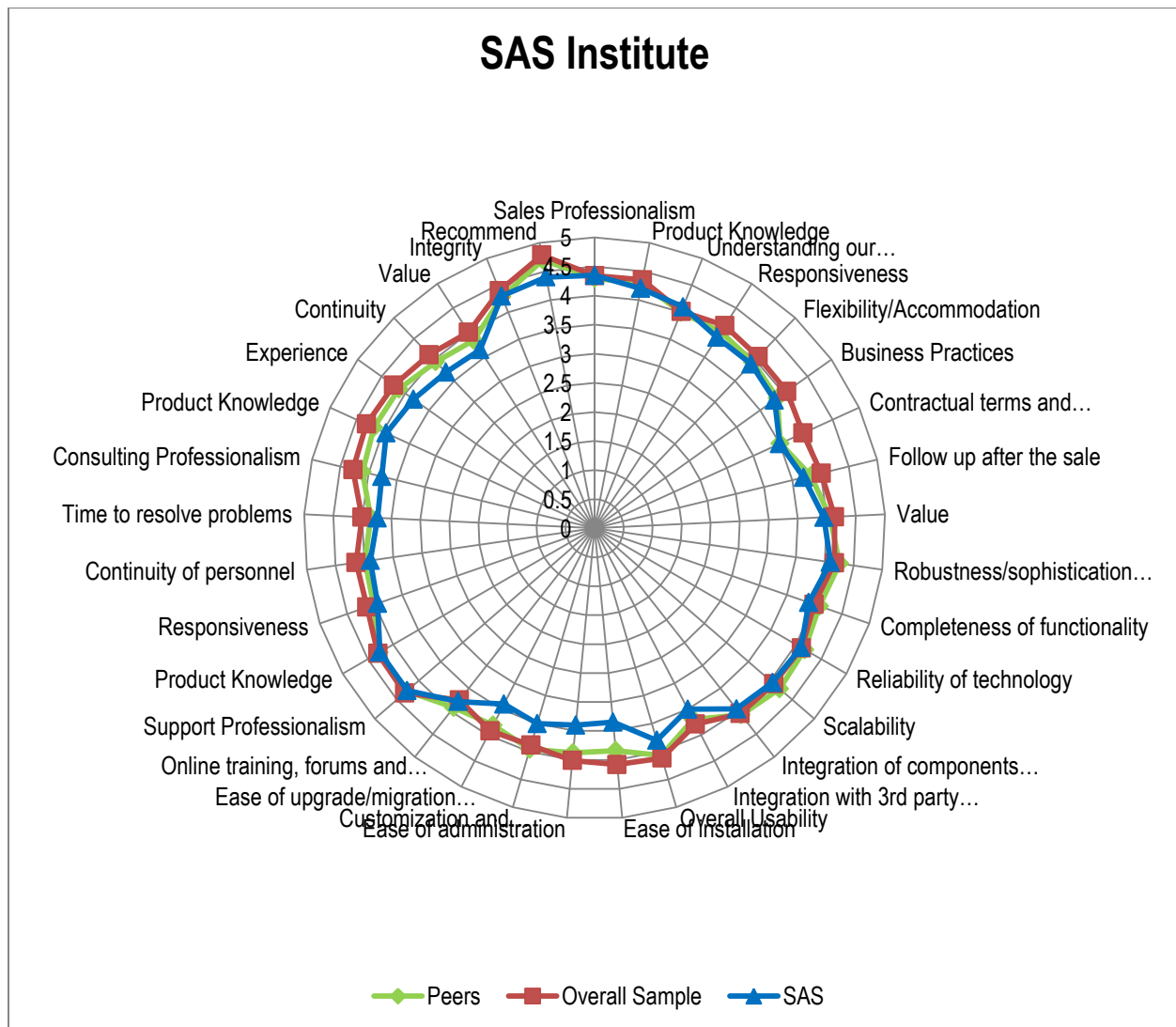
Figure 71 – SAS Institute Detailed Score

A member of the "Large Established Pure-Play" market segment, The SAS Institute showed improved performance in most measurement categories vs. 2012 – including: Sales, Value, Product, Tech Support, Integrity and Recommended. However, for most measures, it was in line with or below peer averages.

Tableau Detailed Score
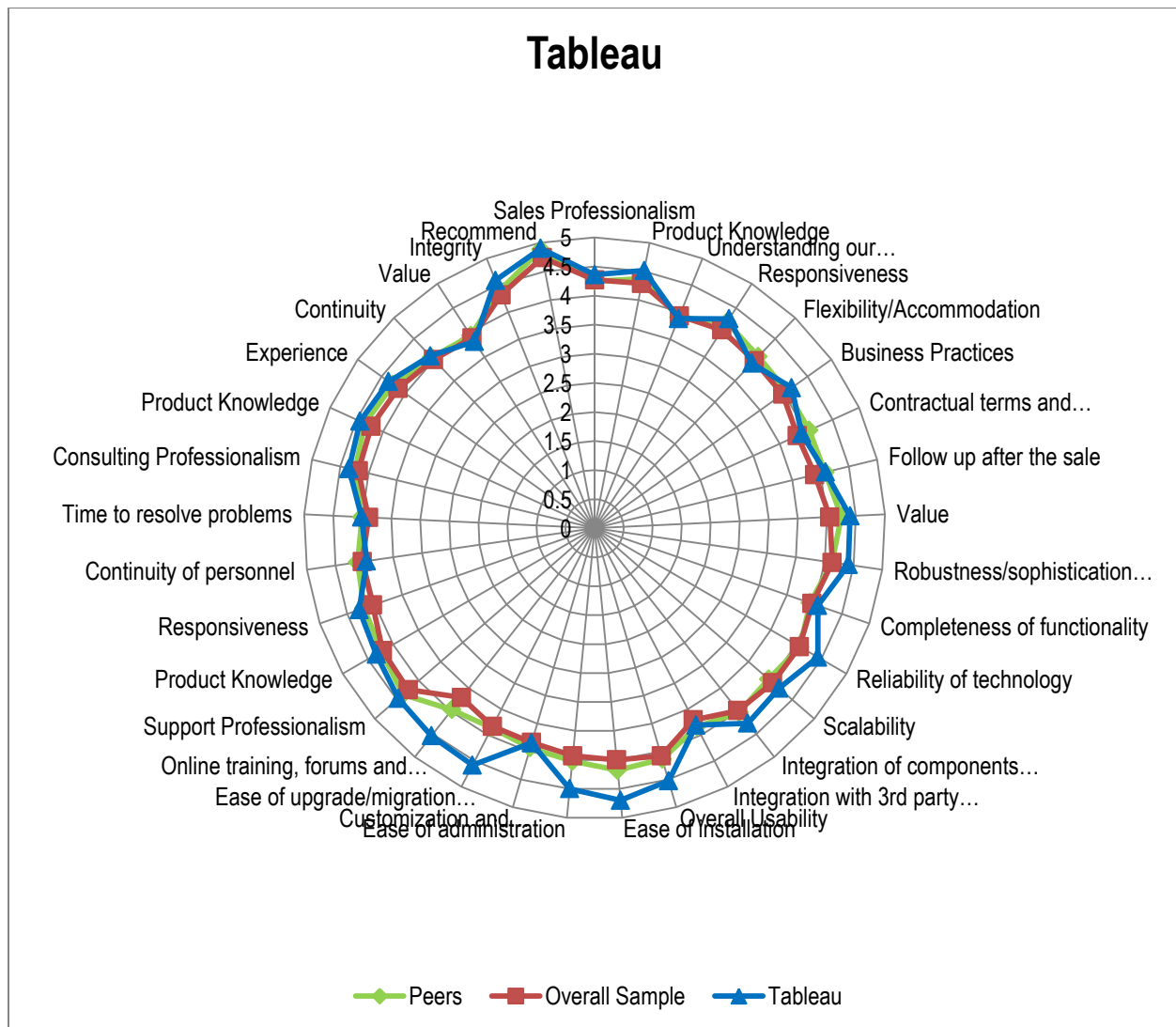
Figure 72 – Tableau Detailed Score

A member of the "High Growth" market segment, Tableau was again ranked as its leader. It was "best in class" across almost all categories of measurement – including Sales, Value, Technology/Product, Technical support and Integrity.

Tibco Spotfire Detailed Score
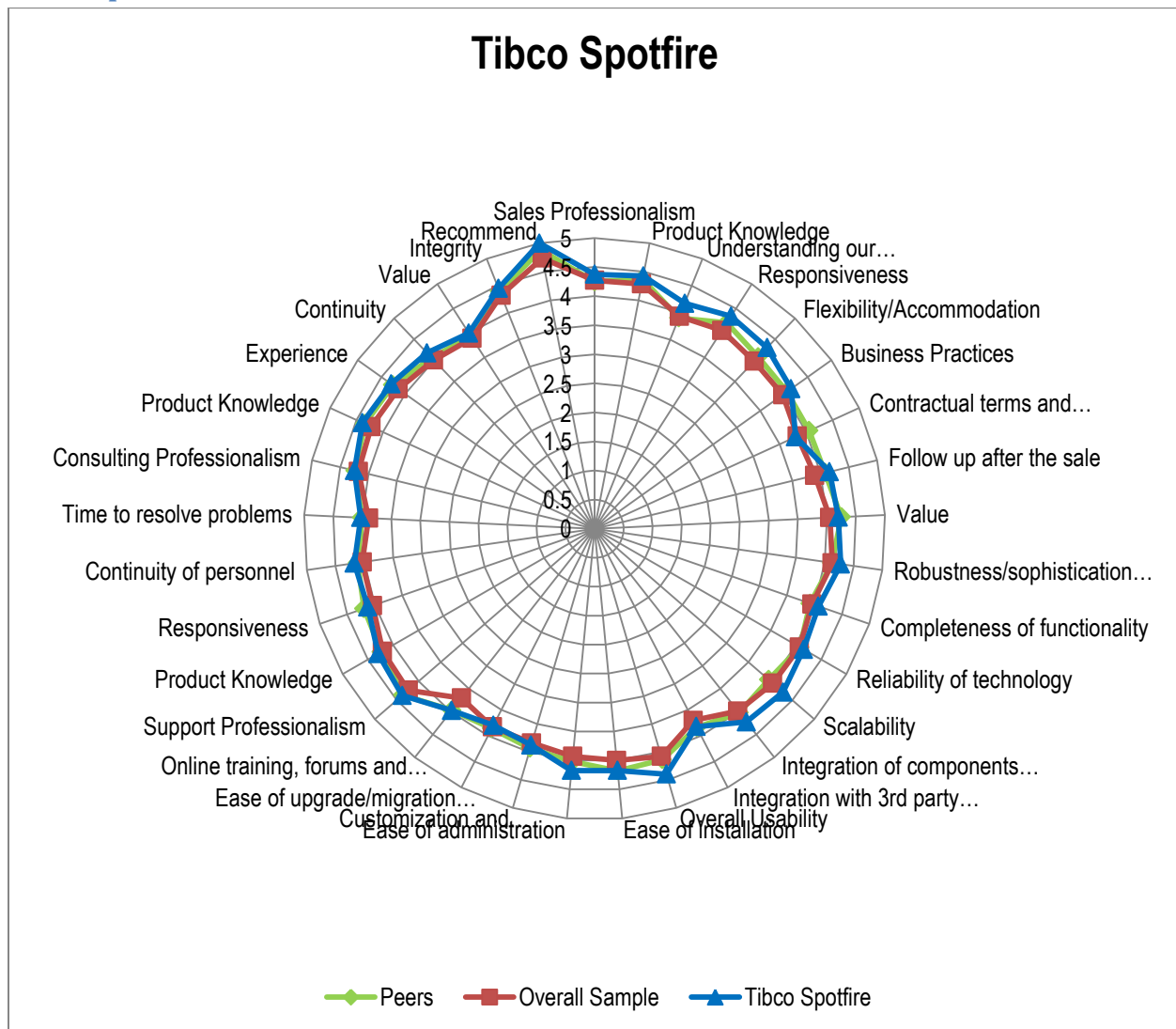
Figure 73 – Tibco Spotfire Detailed Score

A member of the "High Growth" market segment, Tibco Spotfire was "best in class" for several Sales, Product and Consulting measures, as well as overall Value. It had a perfect Recommend score.

Yellowfin Detailed Score
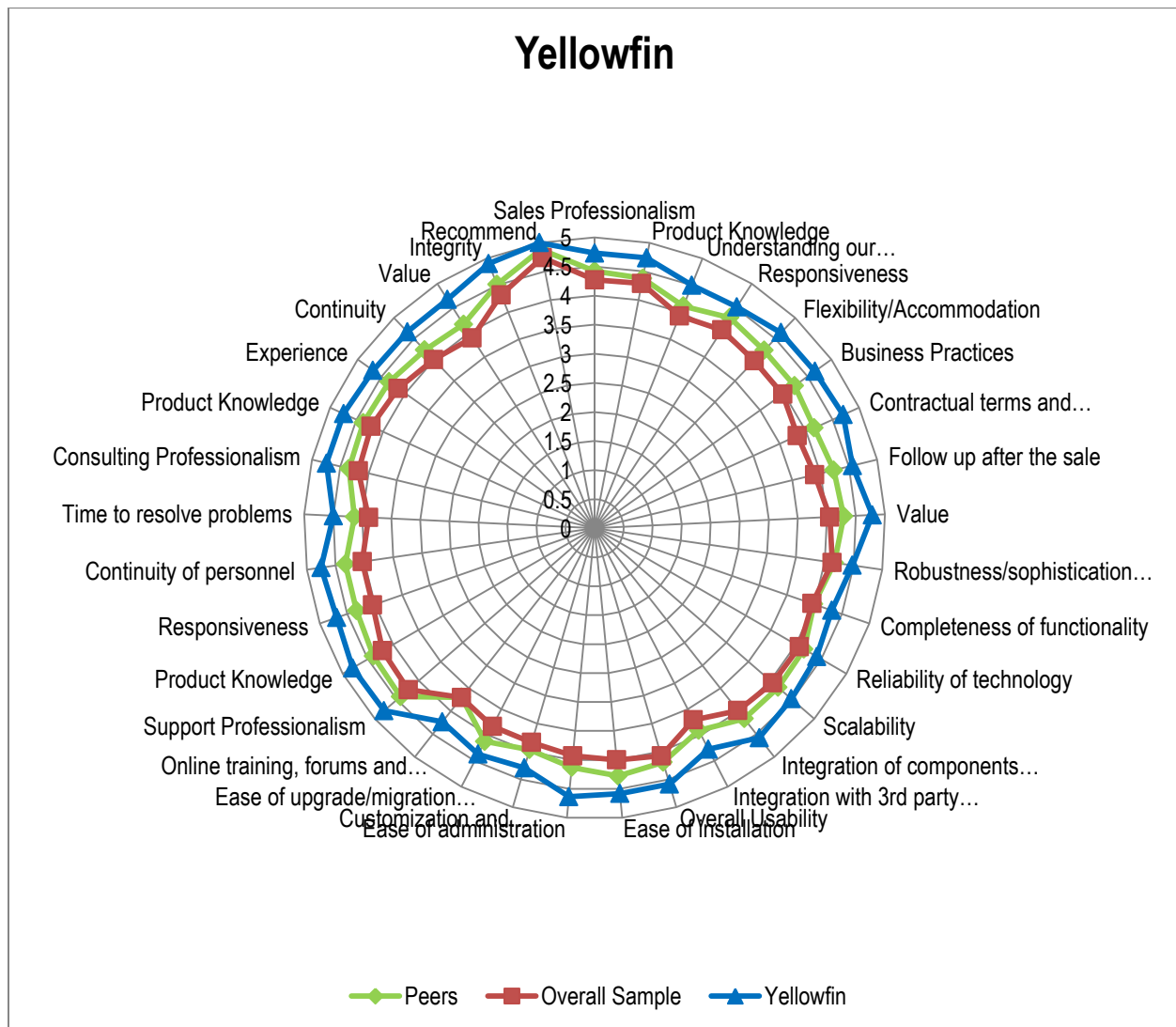
Yellowfin

Figure 74 – Yellowfin Detailed Score

A member of the "Emerging" market segment, Yellowfin was its leader again for 2013, improving scores in virtually all categories vs. 2012. It was "best in class" for all measures in all categories and had a perfect Recommend score.

Appendix - The 2013 Wisdom of Crowds ® Business Intelligence Market Survey Instrument

Welcome to the Wisdom of Crowds ® Business Intelligence Market Study - 2013 Edition.

Qualified users that complete the survey will get a complimentary copy of the 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):

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

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

3. What is your current title?

4. What function are you primarily a part of?

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

○ Executive Management　　　○ Manufacturing　　　○ Sales

○ Finance　　　○ Marketing　　　○ Strategic Planning Function

○ Human Resources　　　○ Operations　　　○ Supply Chain

Other (please specify)

5. Please identify your primary industry

○ Advertising	○ Education	○ Motion Picture & Video
○ Aerospace	○ Energy	○ Not for profit
○ Agriculture	○ Entertainment & Leisure	○ Pharmaceuticals
○ Apparel & Accessories	○ Executive Search	○ Publishing
○ Automotive	○ Financial Services	○ Real Estate
○ Biotechnology	○ Food, Beverage & Tobacco	○ Retail & Wholesale
○ Broadcasting	○ Government	○ Sports
○ Business Services	○ Health Care	○ Technology
○ Chemical	○ Hospitality	○ Telecommunications
○ Consulting	○ Insurance	○ Transportation
○ Consumer Products	○ Legal	○ Utilities
○ Defense	○ Manufacturing	

Other (please specify)

6. How many employees does your company employ worldwide?

○ 1 - 100

○ 101 - 1,000

○ 1,001 - 2,000

○ 2,001 - 5,000

○ 5,001 - 10,000

○ More than 10,000

7. 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?

8. Which function drives your Business Intelligence initiatives?

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

9. 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)

10. 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)

11. 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)

＊12. 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 Mining, Advanced Algorithms, Predictive	○	○	○	○	○
End user "self service"	○	○	○	○	○
Big Data (e.g., Hadoop)	○	○	○	○	○
Mobile Device Support	○	○	○	○	○
Data Discovery	○	○	○	○	○
Open Source Software	○	○	○	○	○
"Embedded" BI (contained within an application, portal, etc.)	○	○	○	○	○
Social media Analysis (SocialBI)	○	○	○	○	○
Ability to write to transactional applications	○	○	○	○	○
Complex Event Processing (CEP)	○	○	○	○	○
Collaborative Support for Group-based Analysis	○	○	○	○	○
Integration with Operational Processes	○	○	○	○	○
Data Warehousing	○	○	○	○	○
Advanced visualization	○	○	○	○	○
Text Analytics	○	○	○	○	○
Search-based Interface	○	○	○	○	○
In-memory analysis	○	○	○	○	○
Dashboards	○	○	○	○	○
Software-as-a-Service and "Cloud" Computing	○	○	○	○	○

Other (please specify)

13. 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	

＊14. Please specify your primary Business Intelligence tool Vendor

○ 1010data	○ Entrinsik	○ Microstrategy
○ Actian	○ eThority	○ Narrative Science
○ Actuate (including Quiterian)	○ Exago	○ NeutrinoBI
○ Adaptive Planning/MyDials	○ Extended Results	○ Oracle
○ Advizor Solutions	○ Foresight Intelligence	○ Panopticon
○ Alpine Data Labs	○ Good Data	○ Panorama
○ Alteryx	○ Grapecity	○ Pentaho
○ Altosoft	○ HiCube/Altair	○ Phocas
○ Andara	○ IBM/Cognos/SPSS	○ PivotLink
○ Angoss Software	○ iDashboards	○ Portus
○ Apesoft	○ Indicee	○ Predixion
○ Arcplan	○ Inetsoft	○ Qliktech
○ Armanta	○ Infor	○ Quest
○ Bime	○ Information Builders (IBI)	○ Rapid Insight
○ Birst	○ Insight Squared	○ Revolution Analytics
○ Bitam	○ IntuitiveBI	○ Roambi (MeLLmo)
○ Board	○ IQ for Business	○ Salient
○ Connexica	○ Jackbe	○ SAP/Business Objects
○ Cubeware	○ Jaspersoft	○ SAS Institute
○ Datameer	○ Jedox/Palo	○ Si Sense
○ Datawatch	○ Jinfonet/JReport	○ SpagoBI
○ Decisioniens	○ Klipfolio	○ Tableau
○ Decisyon	○ Kognitio	○ Targit
○ Dimensional Insight	○ KXEN	○ Tibco/Spotfire
○ Domo (Corda)	○ Lavastorm	○ Visual Intelligence
○ Dundas	○ LogiXML	○ Yellowfin
○ EdgeSpring	○ Lyzasoft	○ Yurbi/5000Fish

○ Emanio   ○ Microsoft

○ Other (please specify)

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

16. 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

17. 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

✱18. 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

✱19. 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	○	○	○	○	○

✱20. 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

✱21. 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)

✱22. 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:

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

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

✱24. Final ranking 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:

[text box]

✱25.

Do you wish to provide ratings for a second vendor?

○ YES

○ NO