Wisdom of Crowds ® Business Intelligence Market Study

Key Findings: 2013 Edition

Dresner Advisory Services, LLC

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2014 Wisdom of Crowds® Data Collection Now Underway

- *Qualified users receive complimentary findings*

- *20 – 30 minute commitment*

- ***www.wisdomsurvey.com** to complete a survey*

- *For more information visit **www.dresneradvisory.com***

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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.

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

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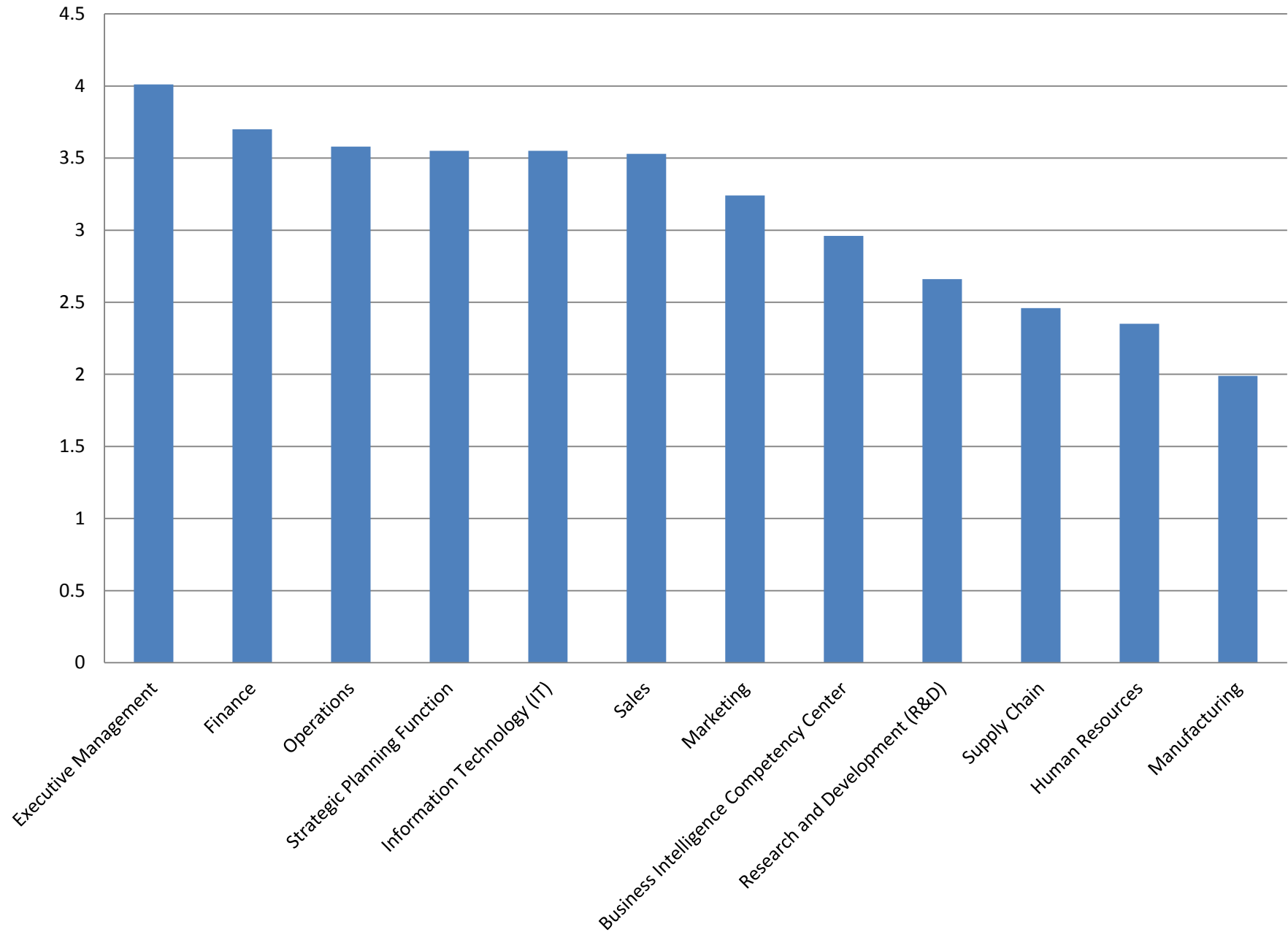
Study Demographics

- Geographies: North America - 59%, EMEA – 25%, APAC - 11%, Latin America - 5%

- Functions: IT - 36%, Executives - 19%, BI Competency Center - 17% , Sales & Marketing - 8%, Finance – 6%

- Key verticals: Healthcare, Financial Services, Manufacturing, Education, Government, Retail

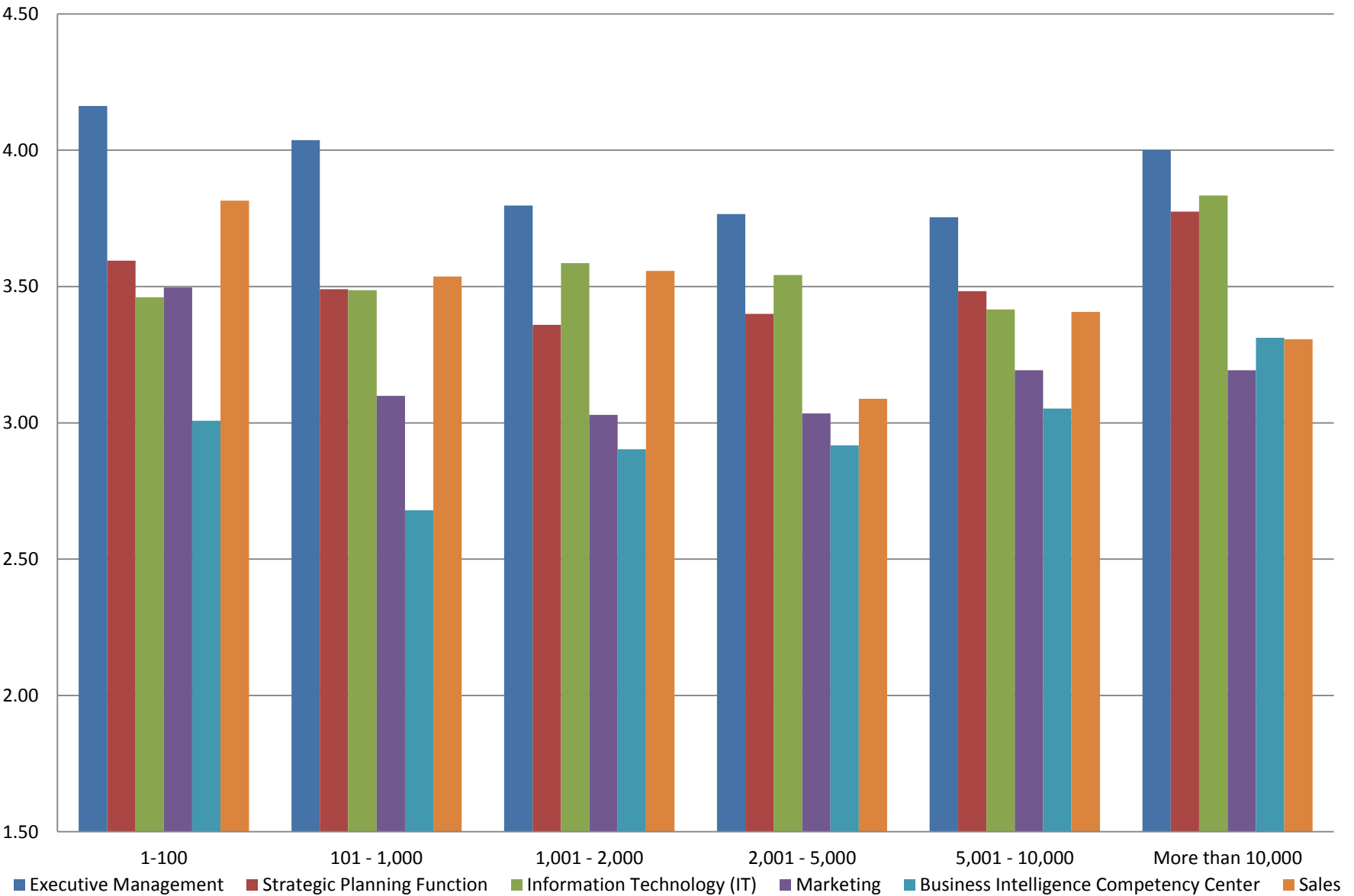- Organization size: Small - 31%, Mid-sized - 34%, Large - 35%

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User Trends

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Functions Driving Business Intelligence

Function	Value
Executive Management	4.01
Finance	3.70
Operations	3.58
Strategic Planning Function	3.55
Information Technology (IT)	3.55
Sales	3.53
Marketing	3.24
Business Intelligence Competency Center	2.96
Research and Development (R&D)	2.66
Supply Chain	2.46
Human Resources	2.35
Manufacturing	1.99

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Functions Driving Business Intelligence by Organization Size

Legend: Executive Management ■ Strategic Planning Function ■ Information Technology (IT) ■ Marketing ■ Business Intelligence Competency Center ■ Sales

Categories: 1-100, 101 - 1,000, 1,001 - 2,000, 2,001 - 5,000, 5,001 - 10,000, More than 10,000

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Targeted Business Intelligence Users

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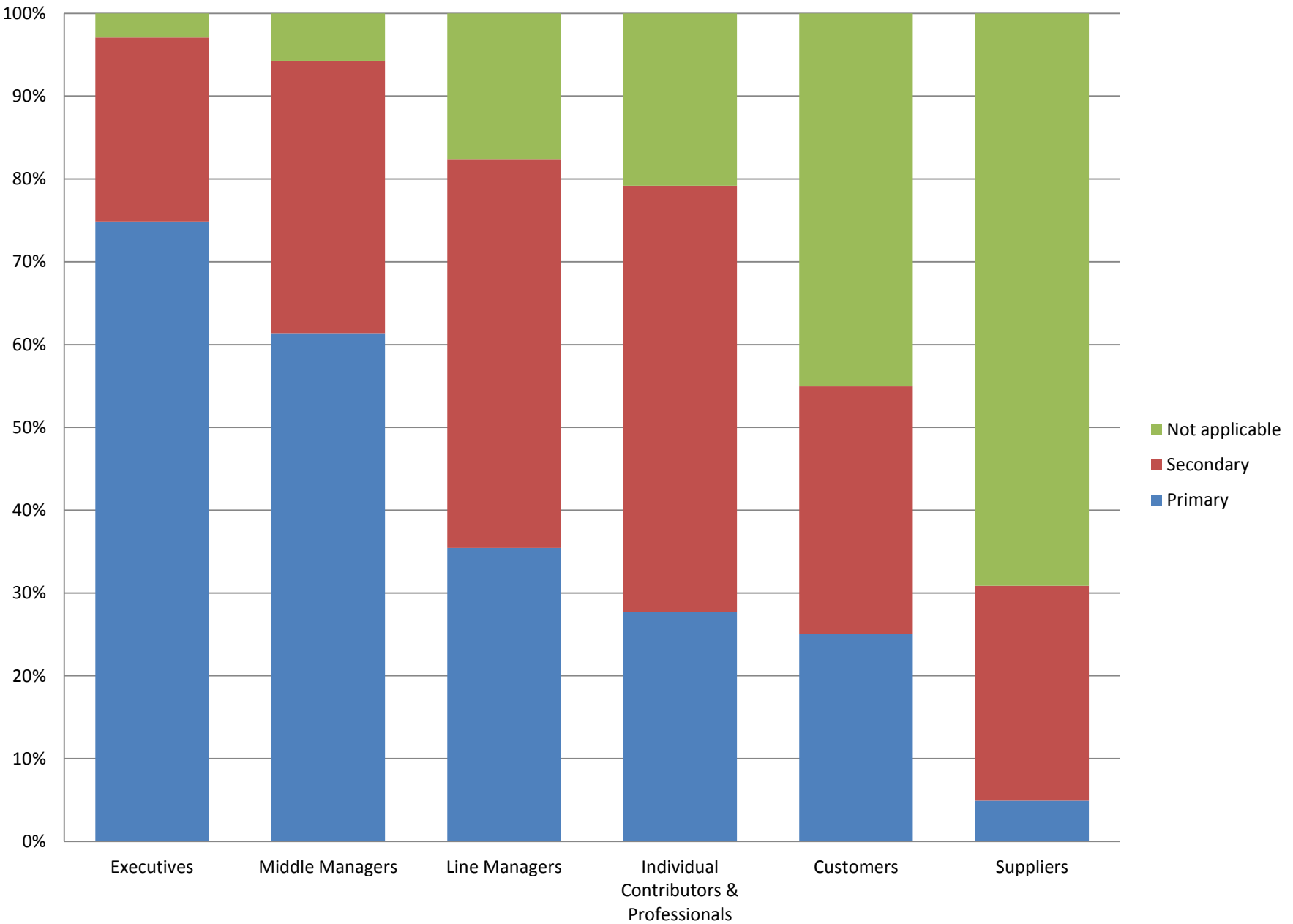
Business Intelligence Objectives
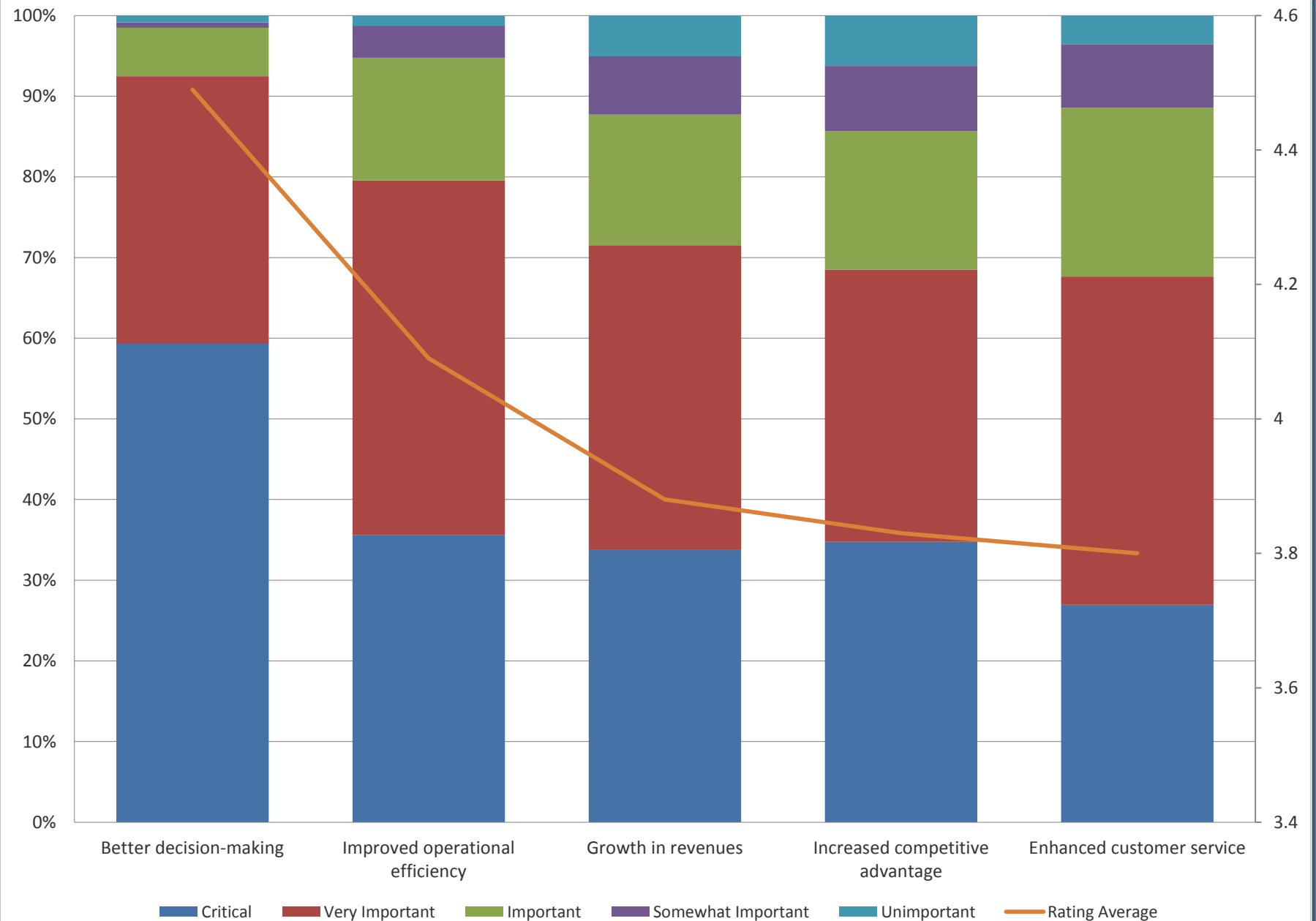
Business Intelligence Objectives by Organization Size

Legend:
- Better decision-making
- Growth in revenues
- Improved operational efficiency
- Enhanced customer service
- Increased competitive advantage

Categories: 1-100, 101 - 1,000, 1,001 - 2,000, 2,001 - 5,000, 5,001 - 10,000, More than 10,000

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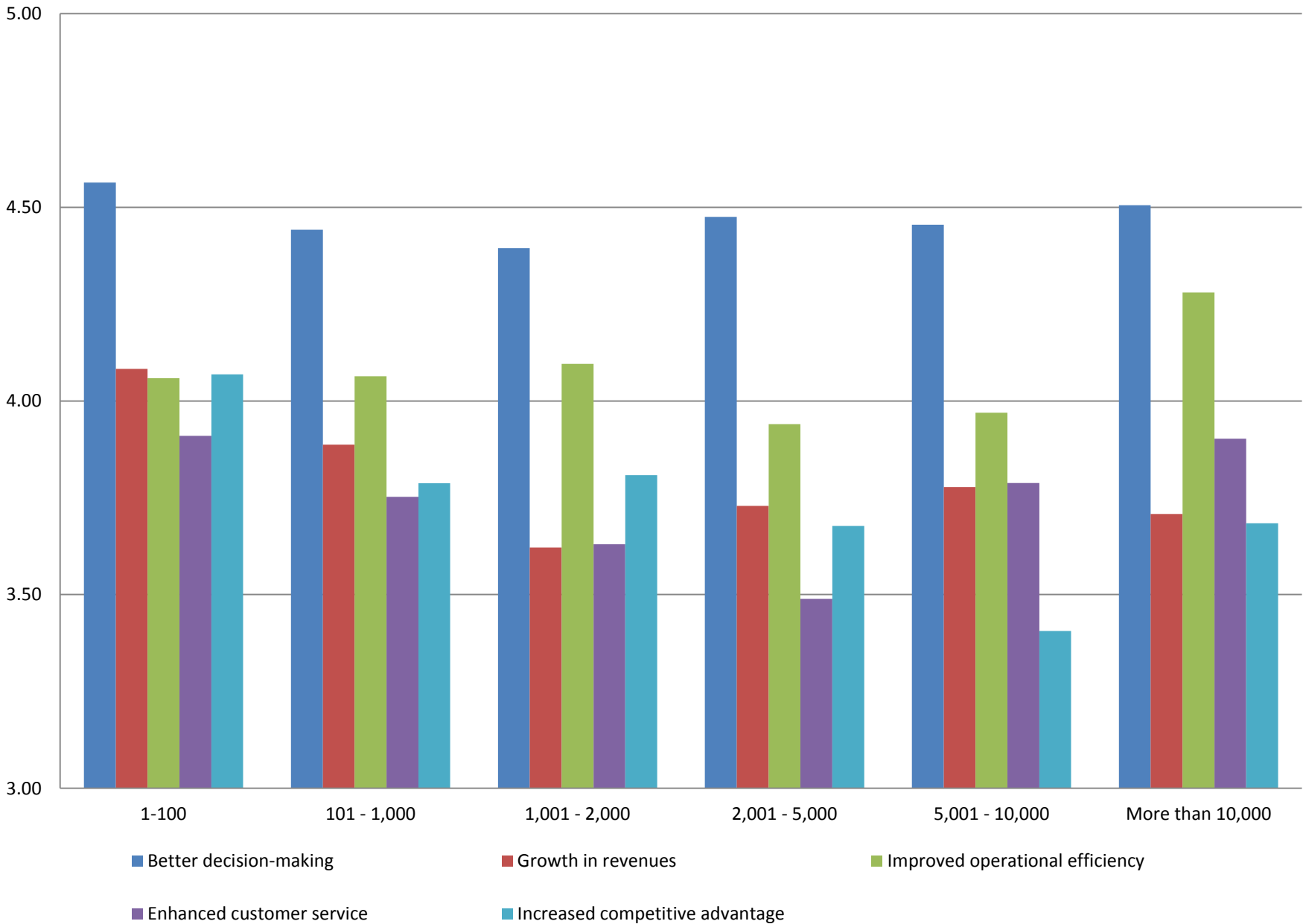
Business Intelligence Objectives by Selected Function

Legend: ■ Growth in revenues ■ Improved operational efficiency ■ Enhanced customer service ■ Increased competitive advantage

Categories: Business Intelligence Competency, Executive Management, Finance, Human Resources, Information Technology (IT), Marketing, Research and Development (R&D), Sales, Strategic Planning Function

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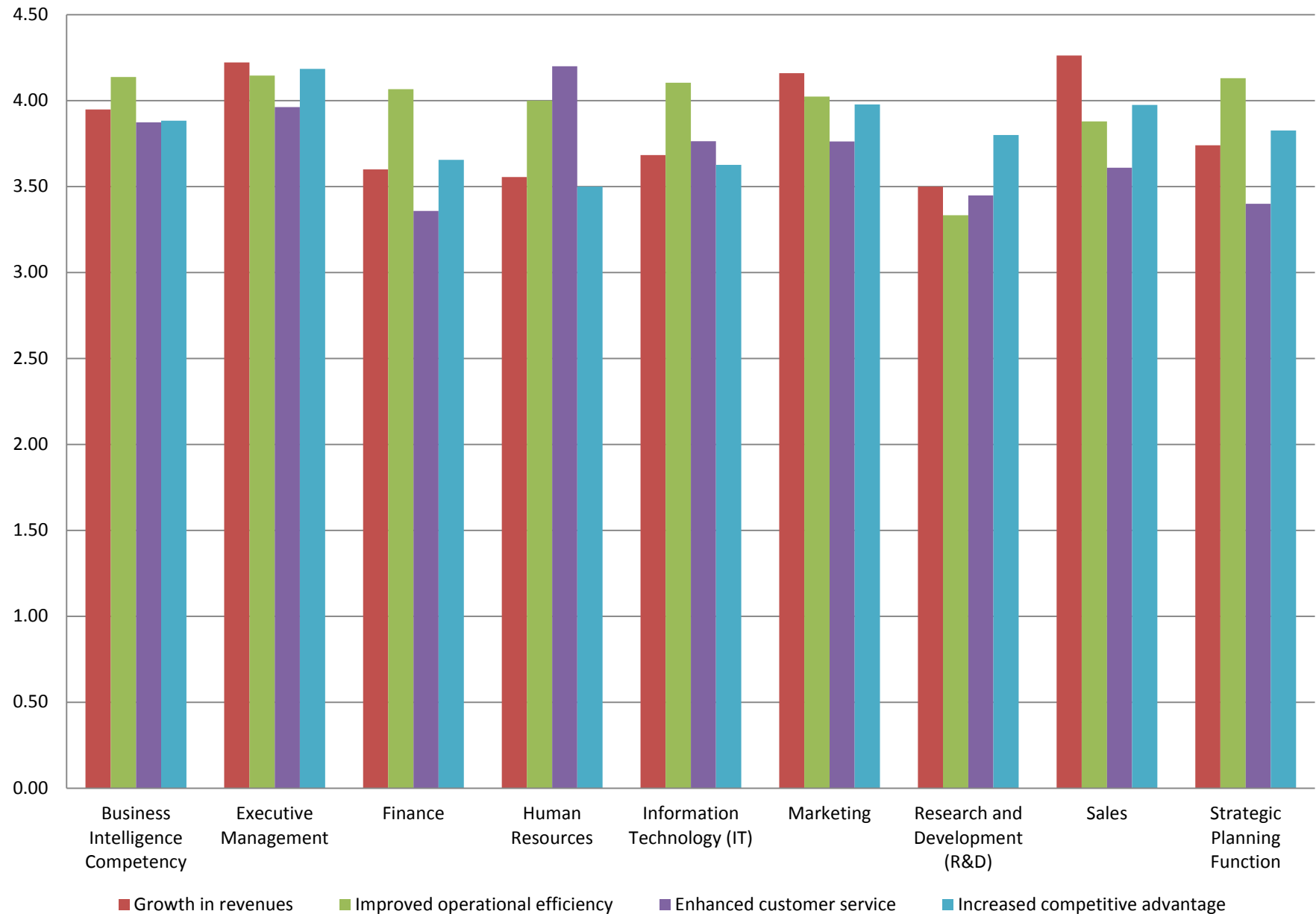
Penetration of Business Intelligence Solutions Today

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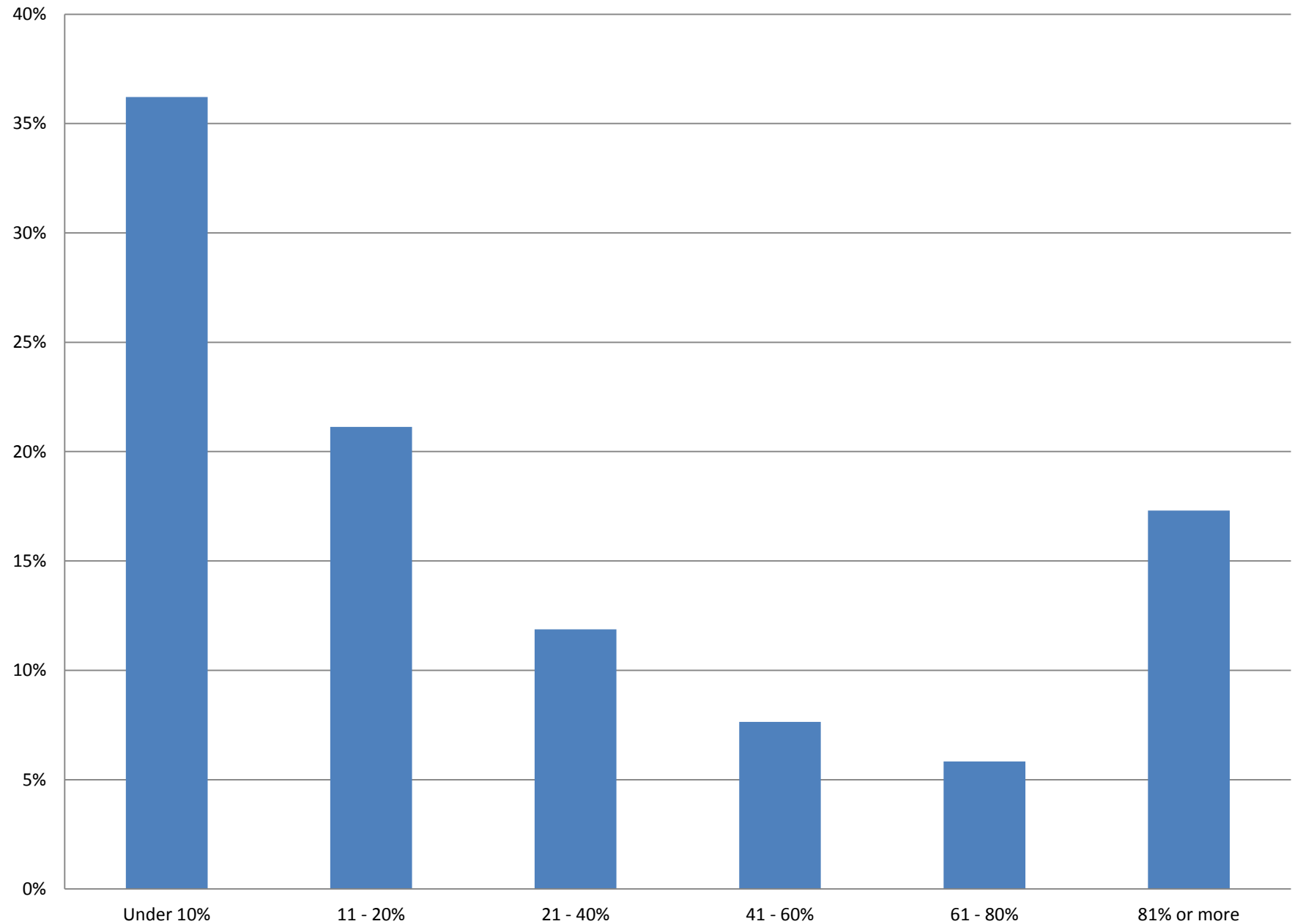
Expansion Plans for Business Intelligence Through 2016
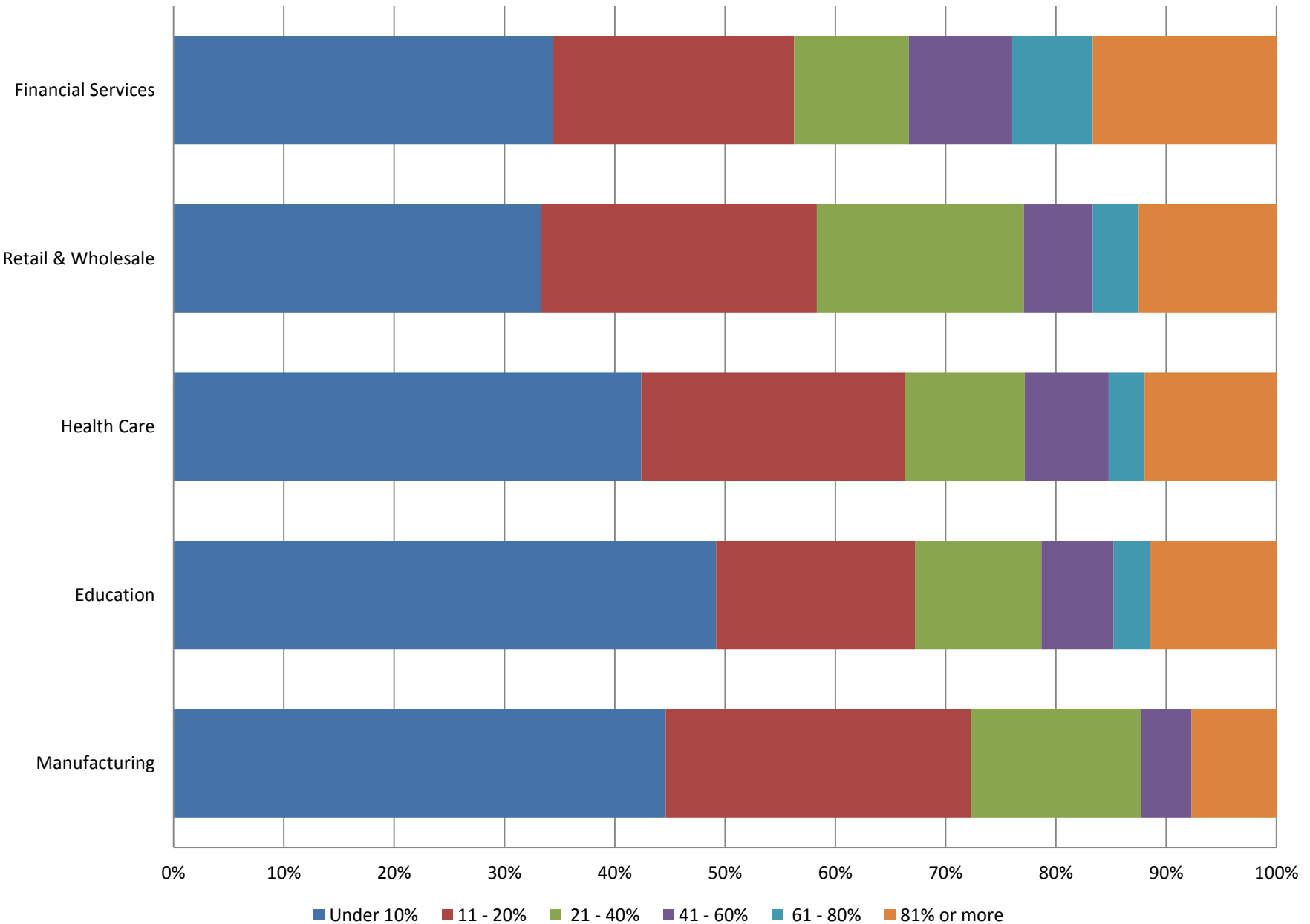

Legend:
- 81% or more
- 61 - 80%
- 41 - 60%
- 21 - 40%
- 11 - 20%
- Under 10%

Categories: In 12 months, In 24 months, In 36 months

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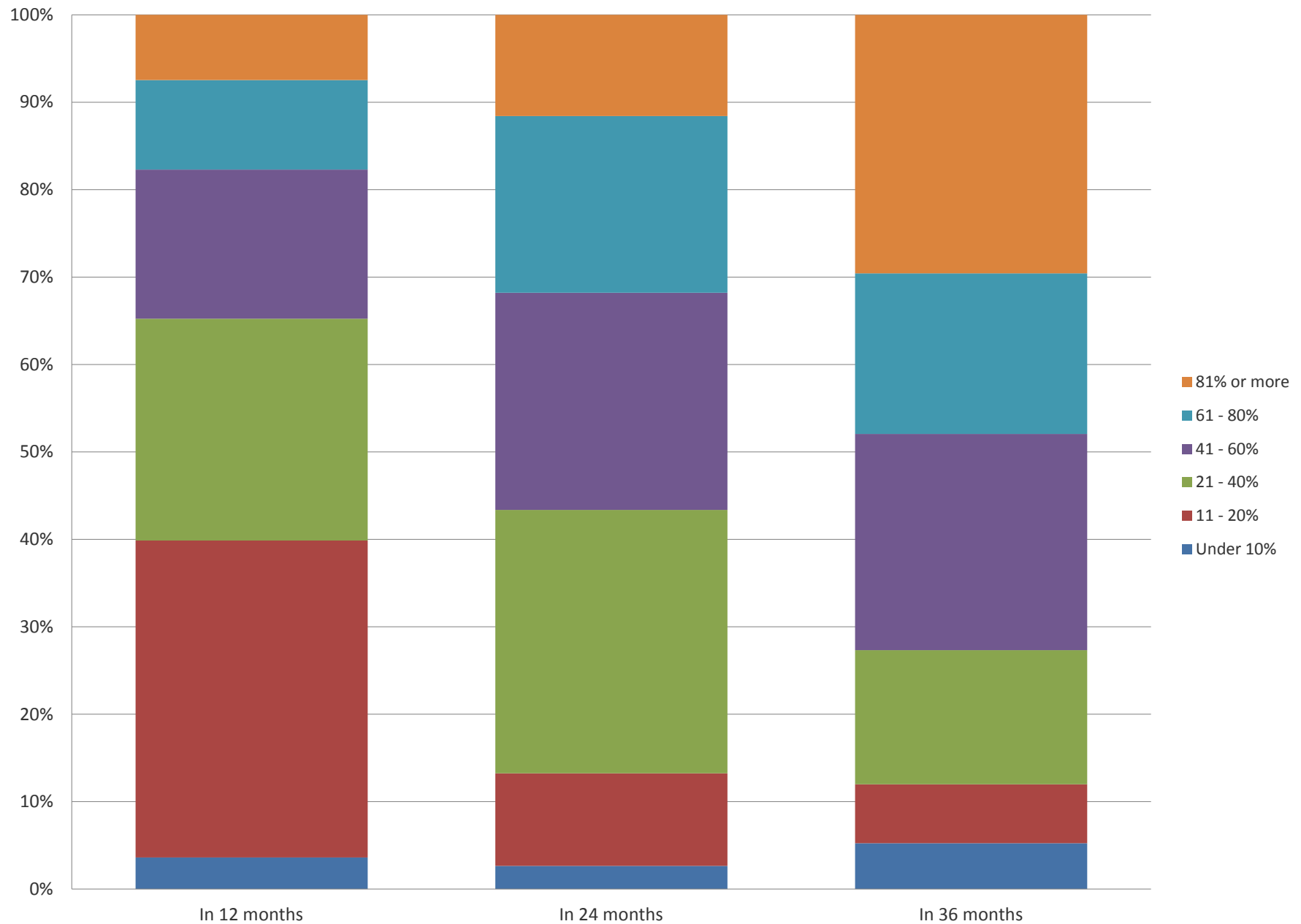
Business Intelligence Penetration by Geography
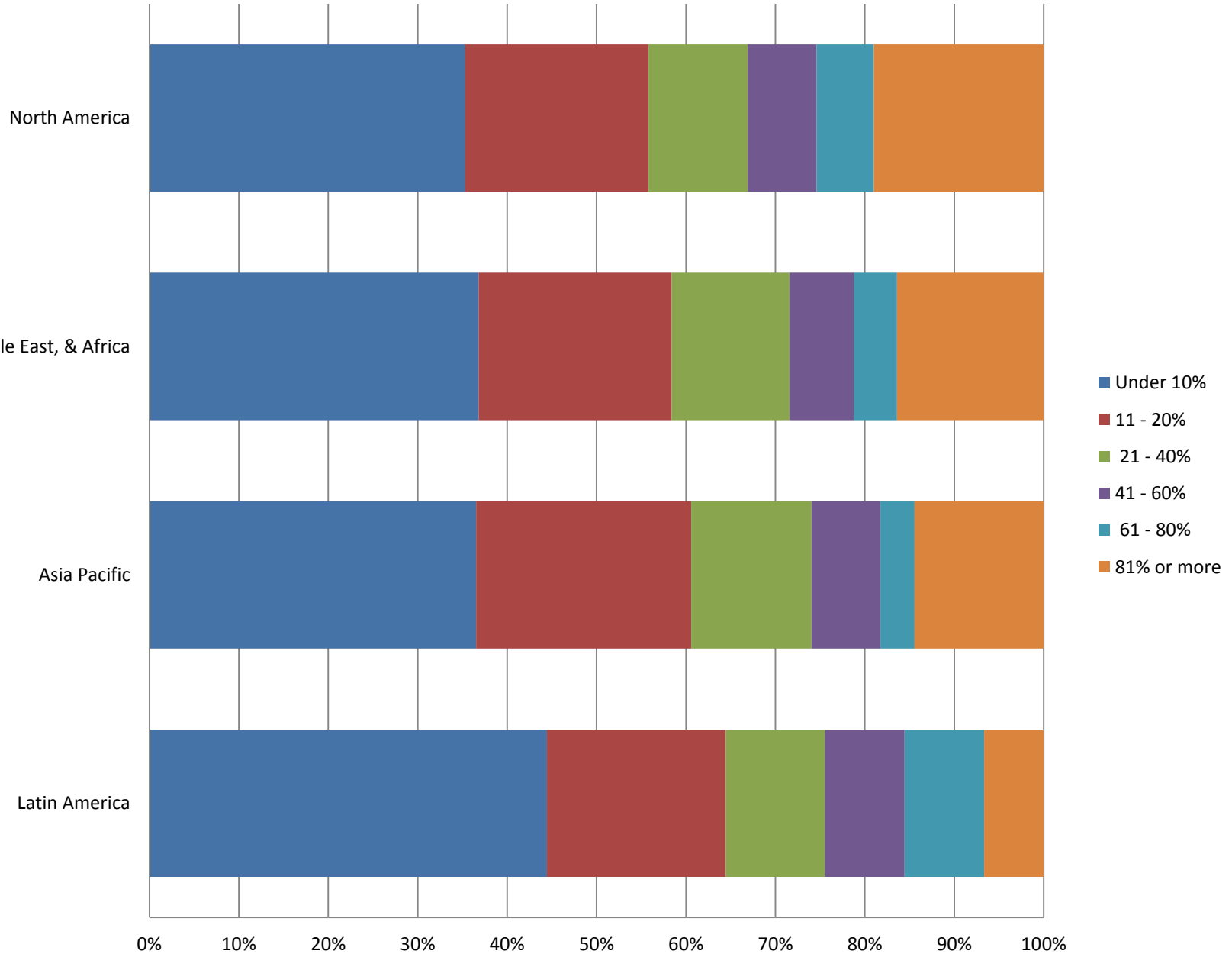
Legend:
- Under 10%
- 11 - 20%
- 21 - 40%
- 41 - 60%
- 61 - 80%
- 81% or more

Categories: North America, Europe, Middle East, & Africa, Asia Pacific, Latin America

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%

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Current Business Intelligence Penetration by Selected Industries

Legend: ■ Under 10% ■ 11 - 20% ■ 21 - 40% ■ 41 - 60% ■ 61 - 80% ■ 81% or more

Categories: Financial Services, Retail & Wholesale, Health Care, Education, Manufacturing

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2014 Planned Business Intelligence Penetration by Selected Industry

Legend: Under 10% | 11 - 20% | 21 - 40% | 41 - 60% | 61 - 80% | 81% or more

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Current Business Intelligence Penetration by Organization Size

Legend: ■ Under 10% ■ 11 - 20% ■ 21 - 40% ■ 41 - 60% ■ 61 - 80% ■ 81% or more

Categories (top to bottom): More than 10,000; 5,001 - 10,000; 2,001 - 5,000; 1,001 - 2,000; 101 - 1,000; 1-100

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2014 Planned Business Intelligence Penetration by Organization Size

Legend: ■ Under 10% ■ 11 - 20% ■ 21 - 40% ■ 41 - 60% ■ 61 - 80% ■ 81% or more

Categories (top to bottom): More than 10,000 | 5,001 - 10,000 | 2,001 - 5,000 | 1,001 - 2,000 | 101 - 1,000 | 1-100
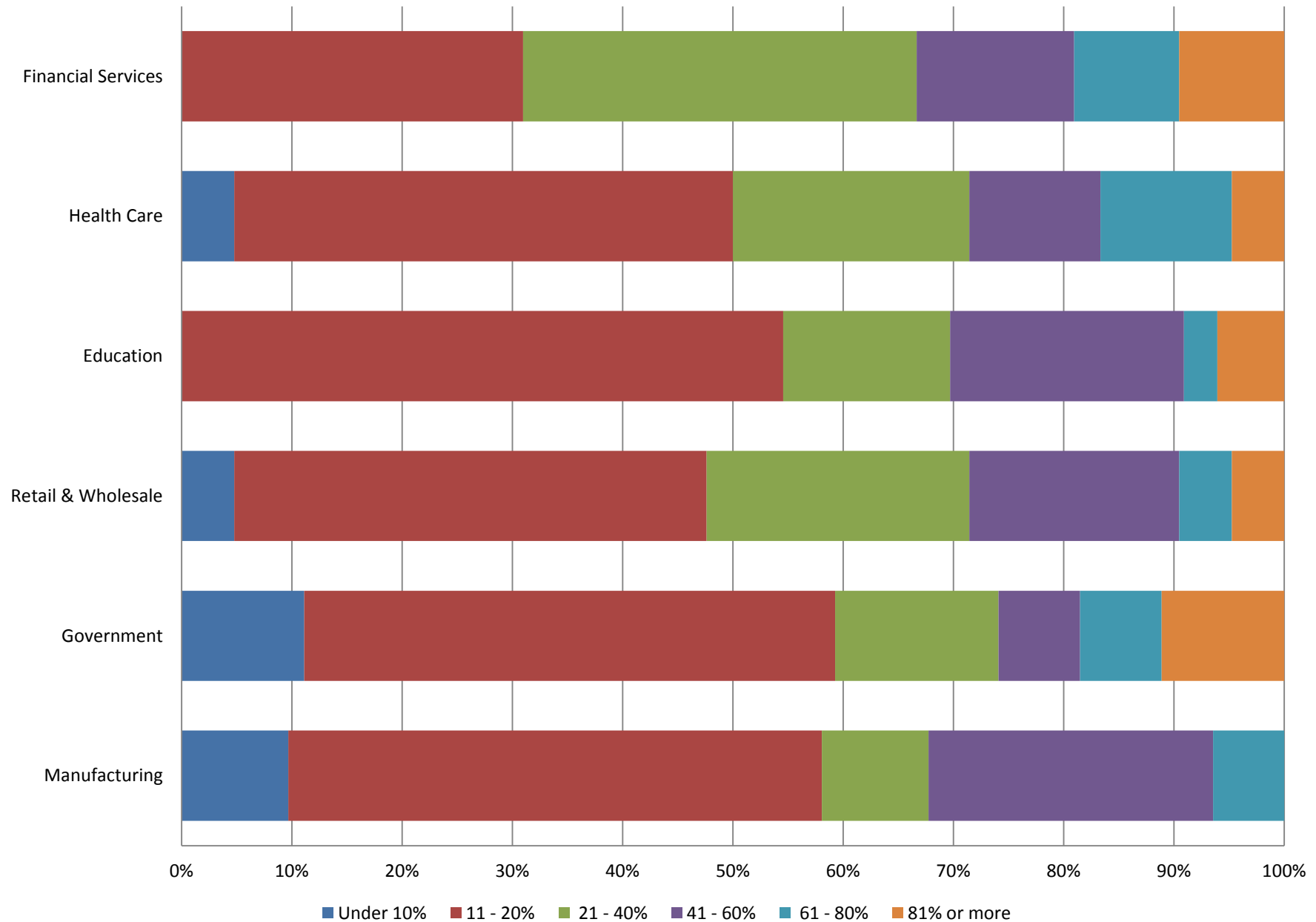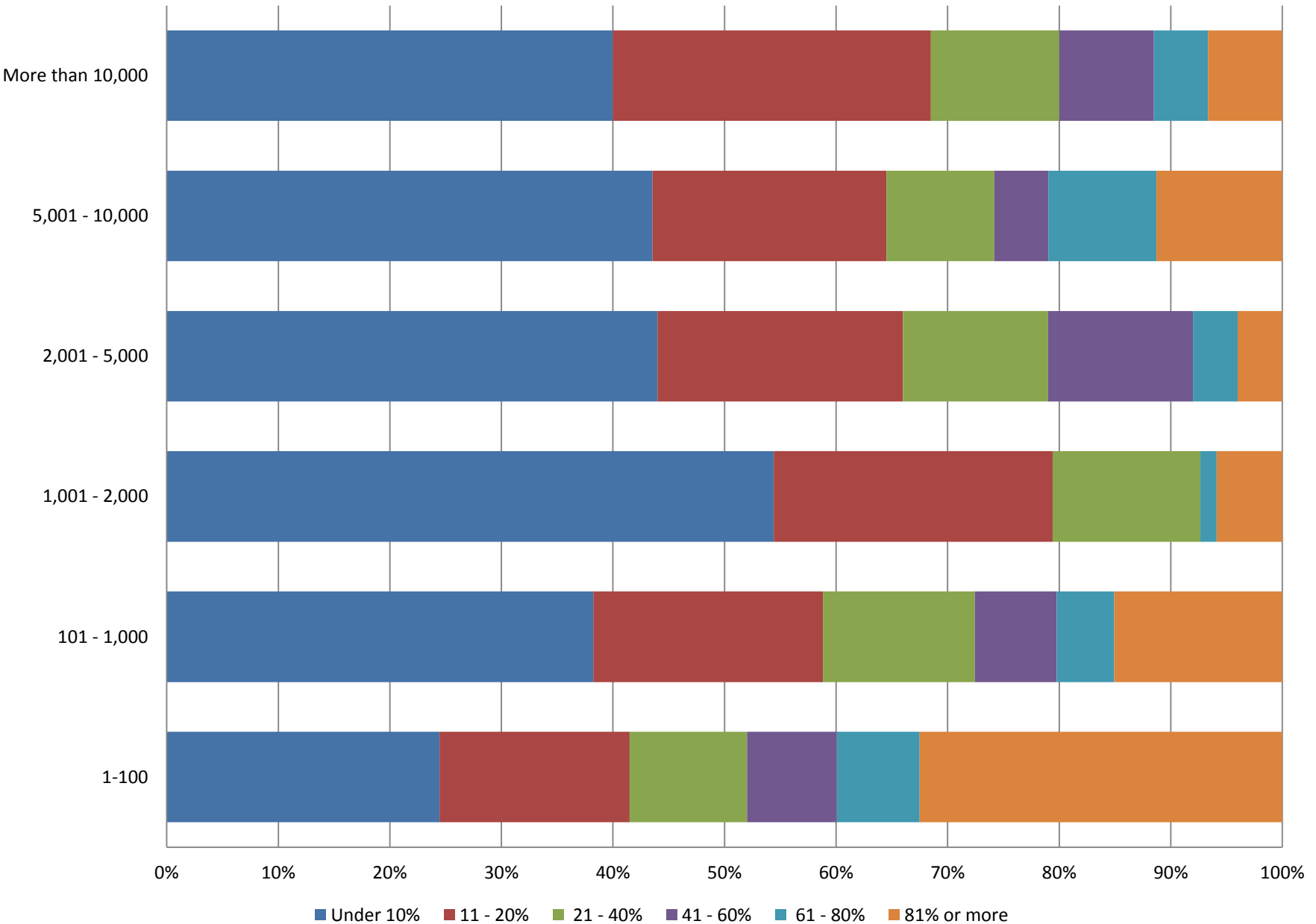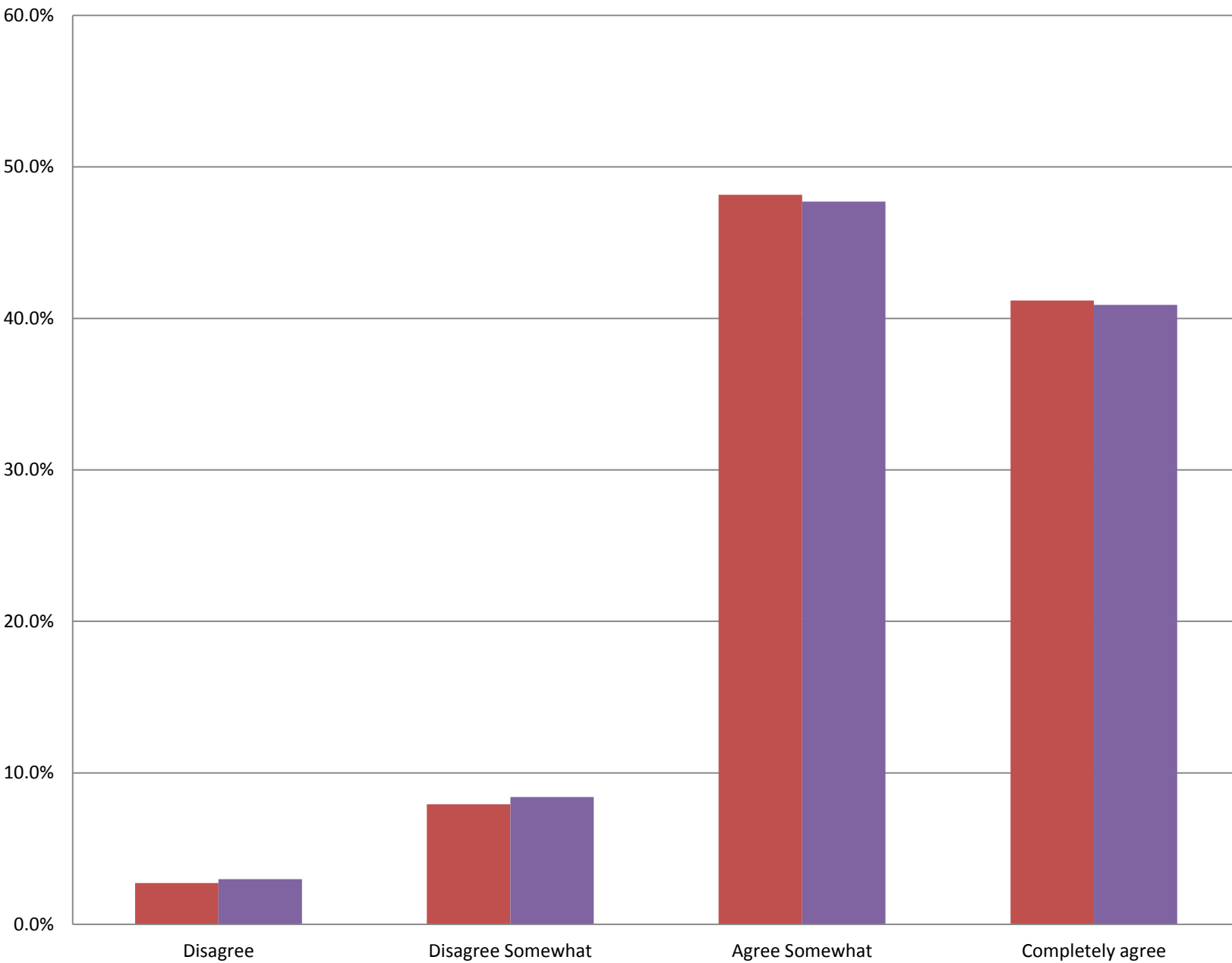
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Success with Business Intelligence 2012 - 2013

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12 Month Deployment Plans by Success with Business Intelligence

Legend: Under 10% | 11 - 20% | 21 - 40% | 41 - 60% | 61 - 80% | 81% or more

Categories (top to bottom): Completely agree, Agree Somewhat, Disagree Somewhat, Disagree

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Numbers of Business Intelligence Tools in Use

Numbers of Business Intelligence Tools - Change from 2012

Legend: ■ diff. %

X-axis categories: Don't know, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 or more

Y-axis: 4%, 3%, 2%, 1%, 0%, -1%, -2%, -3%, -4%, -5%, -6%
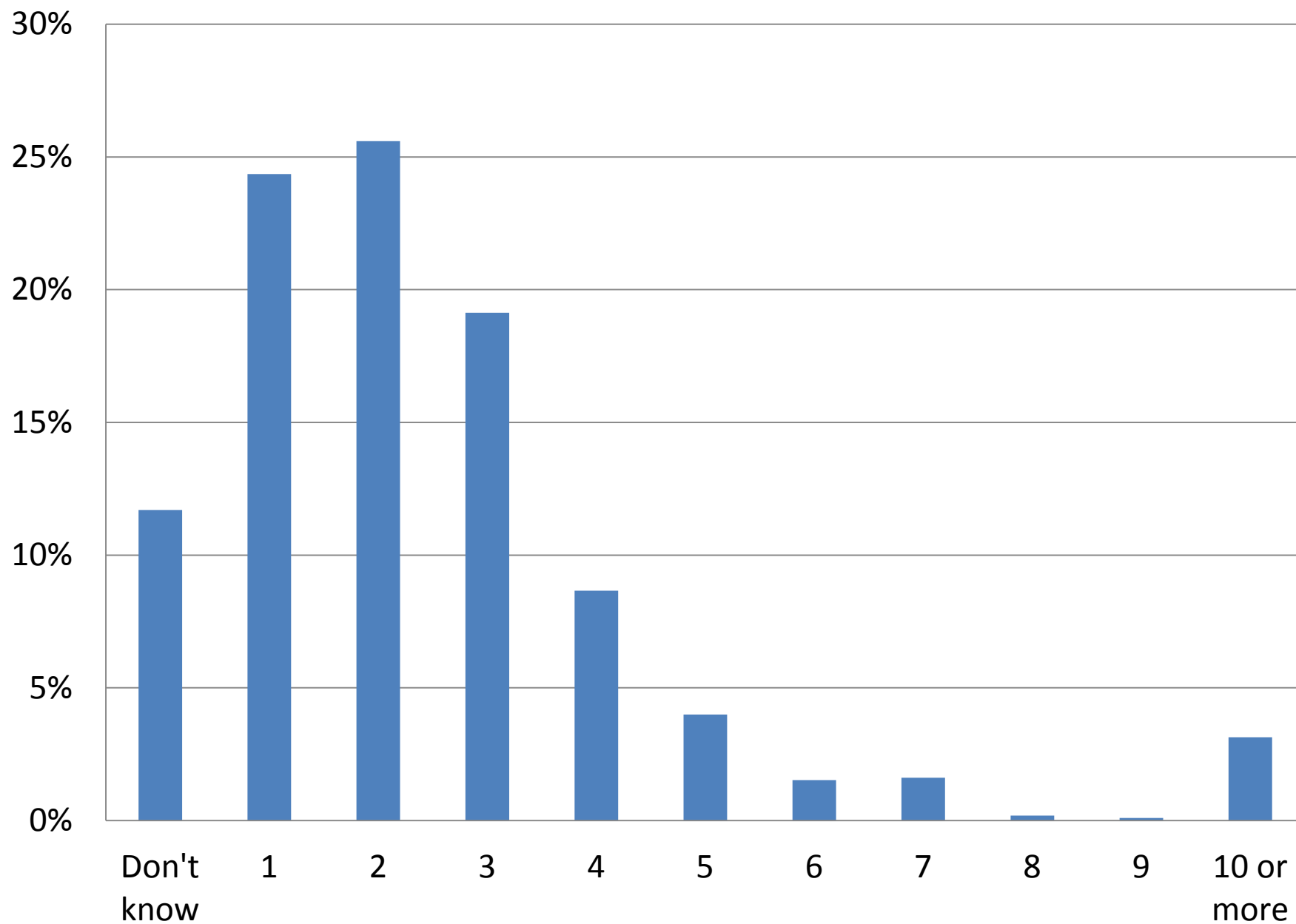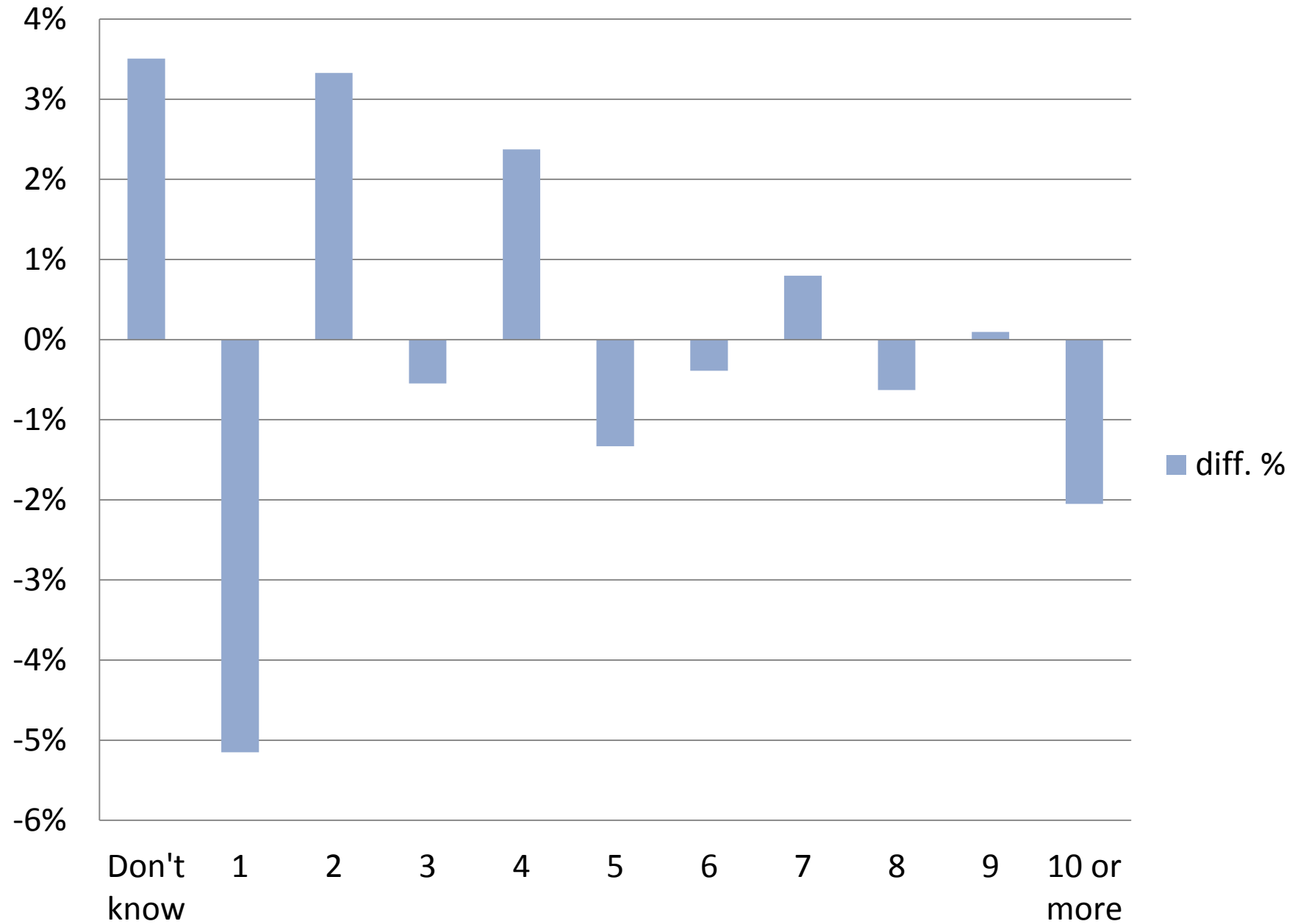
Success with Business Intelligence by Numbers of Tools

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

Categories: Completely agree, Agree Somewhat, Disagree Somewhat, Disagree

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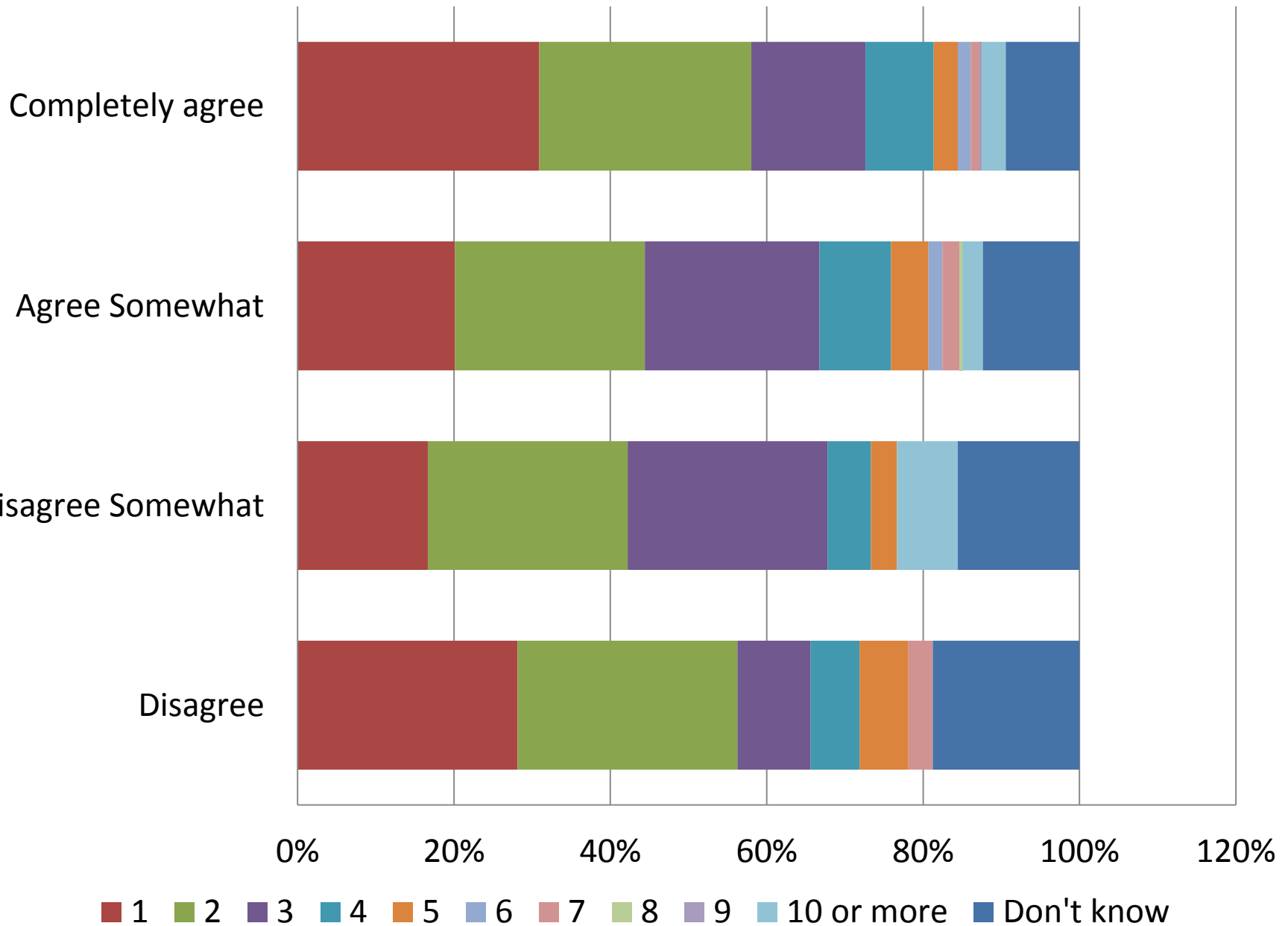
Related Technologies & Initiatives Strategic to Business Intelligence

Legend: ■ Critical ■ Very Important ■ Important ■ Somewhat Important ■ Not Important

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

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Technology Priority Changes from 2012

Chart showing technology priority changes from 2012 (percentage):
- Software-as-a-Service and "Cloud" Computing: ~3.8%
- Dashboards: ~2.7%
- Mobile Device Support: ~1.5%
- Advanced visualization: ~-1.5%
- Integration with Operational Processes: ~-2.2%
- Ability to write to transactional applications: ~-2.5%
- Social media Analysis (SocialBI): ~-2.8%
- Data Warehousing: ~-3.3%
- Data Mining, Advanced Algorithms, Predictive: ~-3.9%
- Text Analytics: ~-4.3%
- In-memory analysis: ~-4.5%
- End user "self service": ~-4.8%
- Collaborative Support for Group-based Analysis: ~-6.4%
- Open Source Software: ~-7.5%
- Big Data (e.g., Hadoop): ~-8.1%
- Complex Event Processing (CEP): ~-10.2%

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Technology Priorities of Smaller Organizations (Weighted Mean)

Legend:
- ■ 1-100
- ■ 101 - 1,000
- ■ 1,001 - 2,000
- ■ 2,001 - 5,000
- ■ 5,001 - 10,000
- ■ More than 10,000

Categories: Mobile Device Support, Software-as-a-Service and "Cloud" Computing, Social media Analysis (SocialBI)
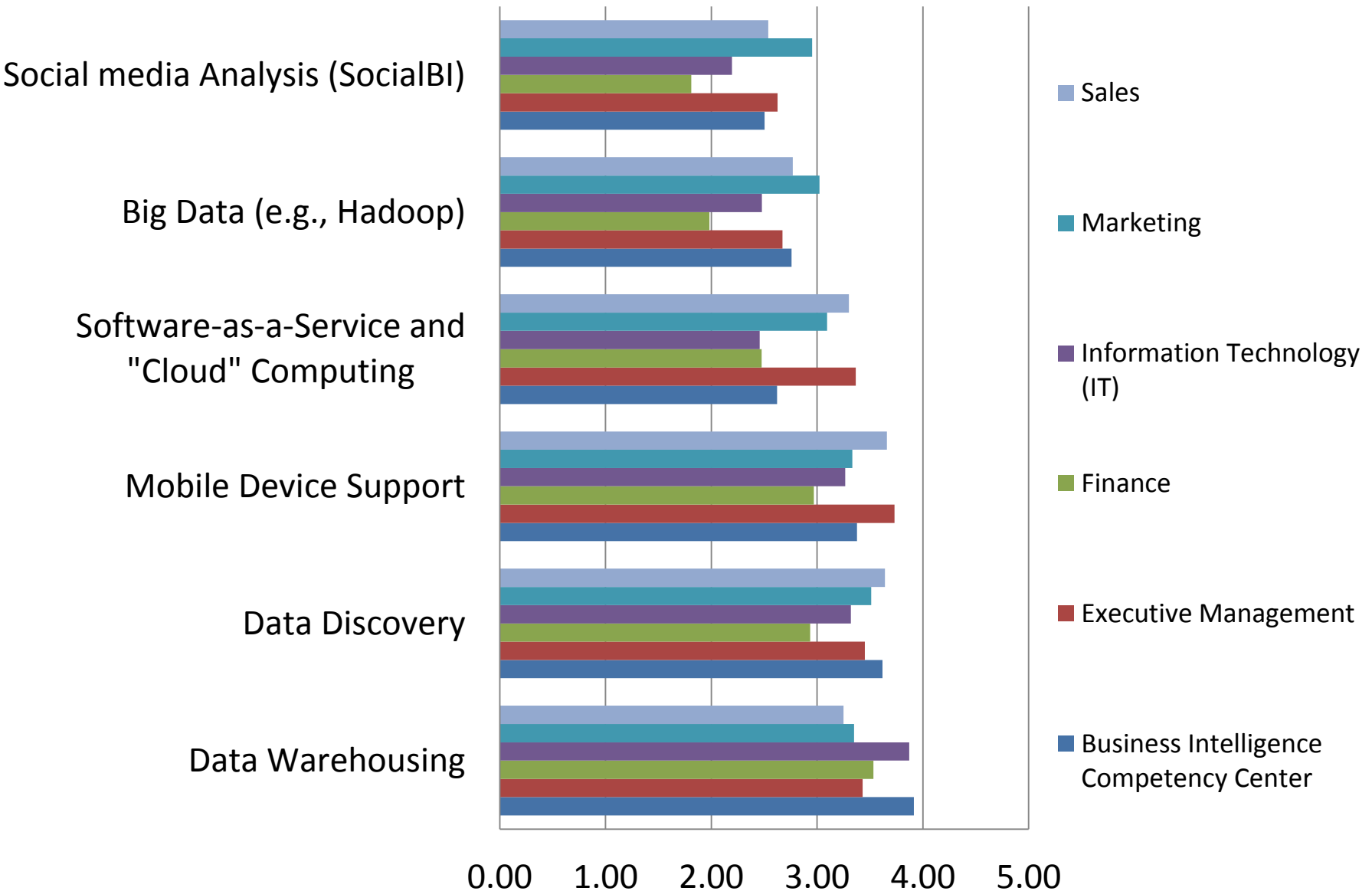
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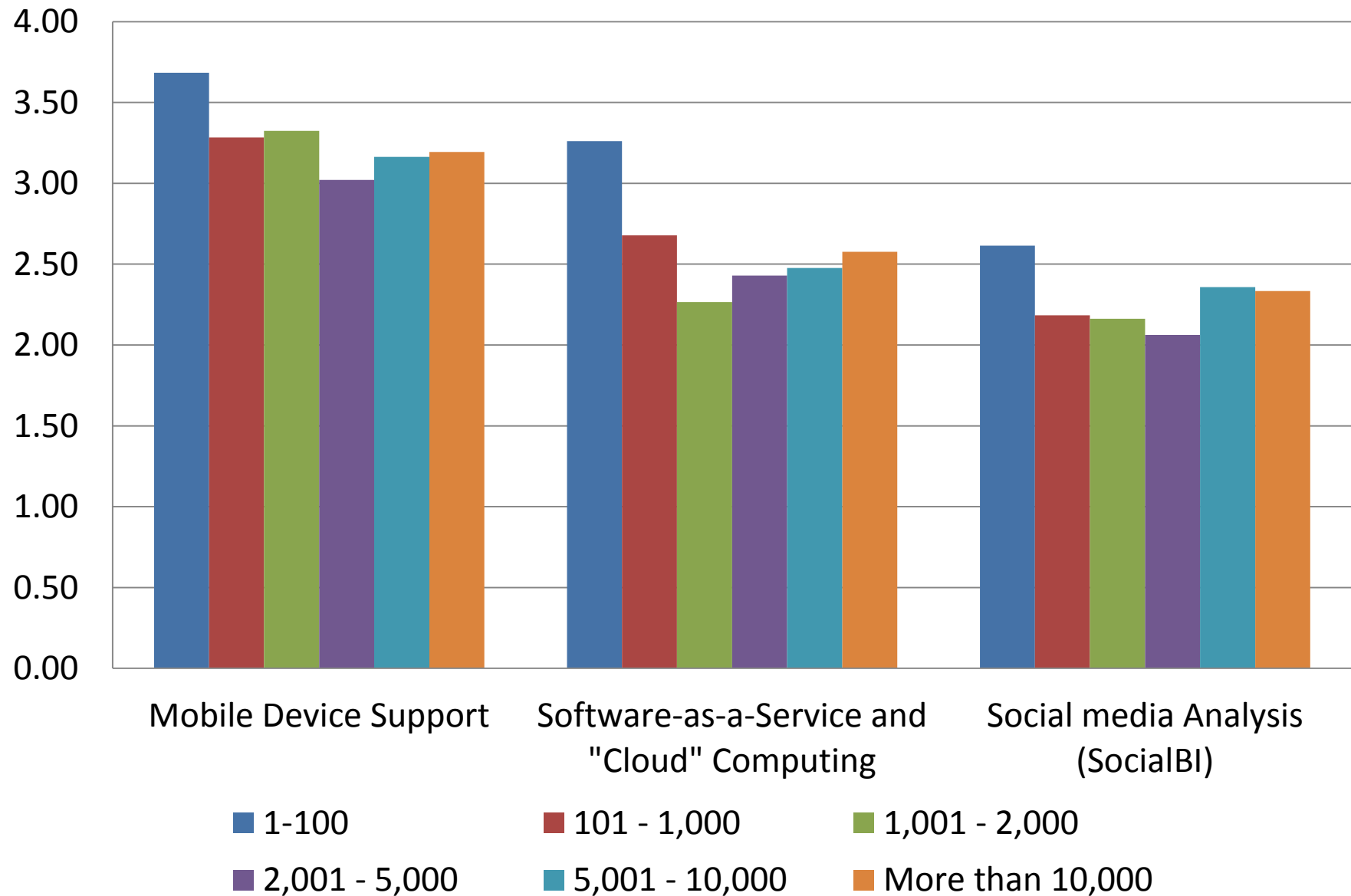
Technology Priorities of Larger Organizations (Weighted Mean)
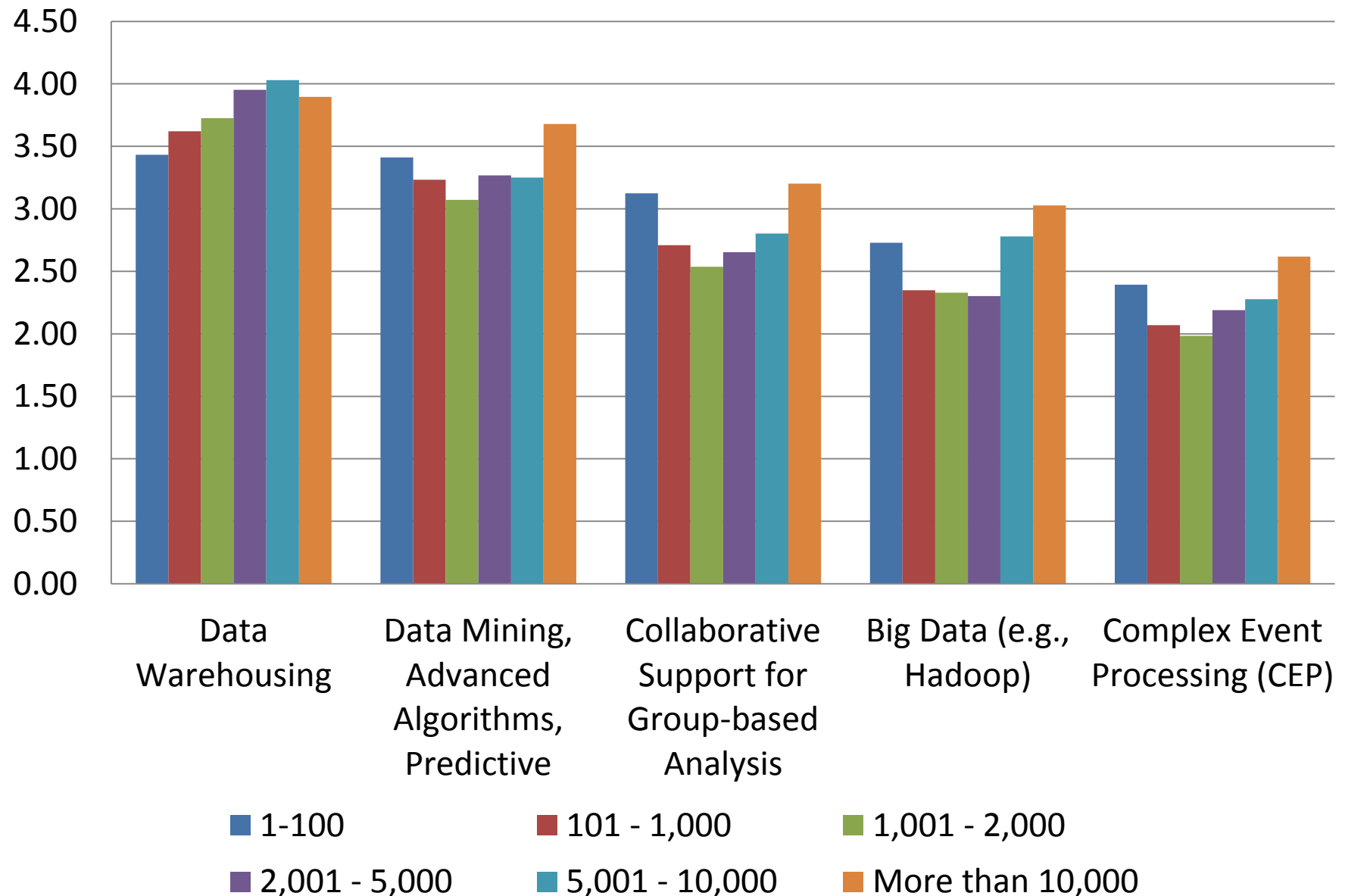
Technology Priorities by Selected Functions (Weighted Mean)

Legend:
- Sales
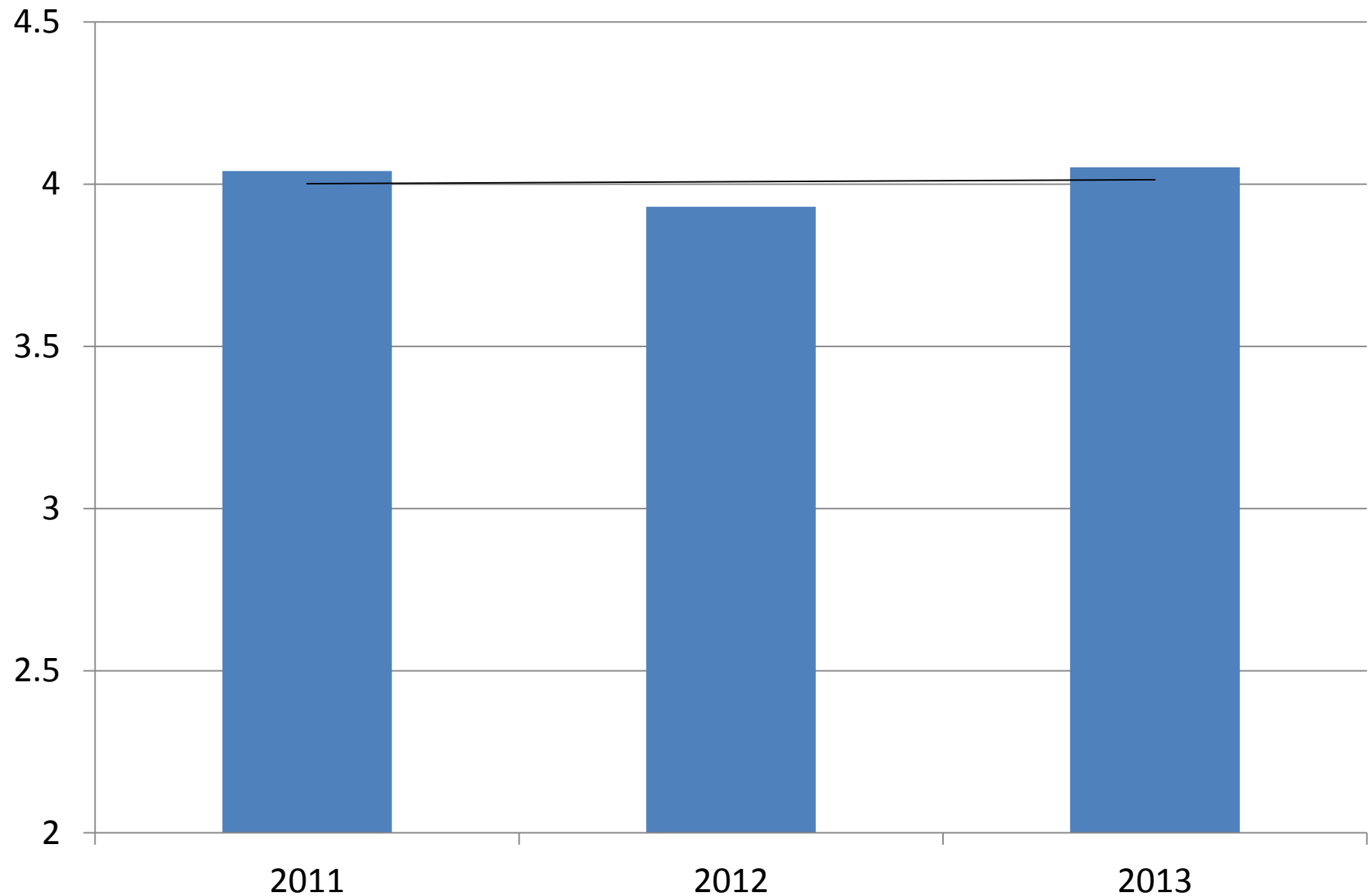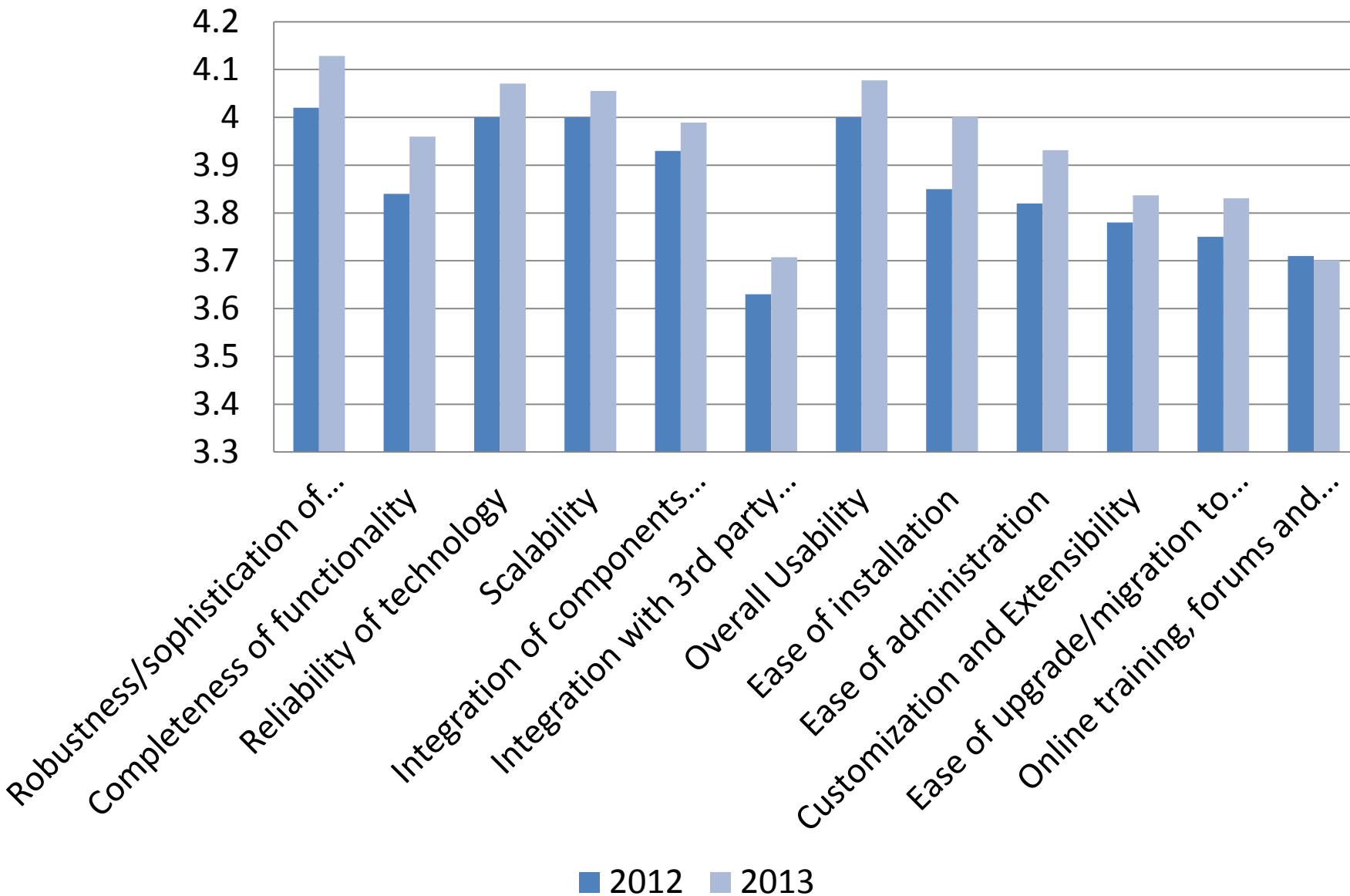- Marketing
- Information Technology (IT)
- Finance
- Executive Management
- Business Intelligence Competency Center

Categories (top to bottom):
- Social media Analysis (SocialBI)
- Big Data (e.g., Hadoop)
- Software-as-a-Service and "Cloud" Computing
- Mobile Device Support
- Data Discovery
- Data Warehousing

X-axis: 0.00, 1.00, 2.00, 3.00, 4.00, 5.00

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Industry Performance – Sales/Acquisition Experience (Weighted Mean)

Legend: 2012, 2013

Categories: Professionalism, Product Knowledge, Understanding our business/needs, Responsiveness, Flexibility/Accommodation, Business Practices, Contractual terms and conditions, Follow up after the sale

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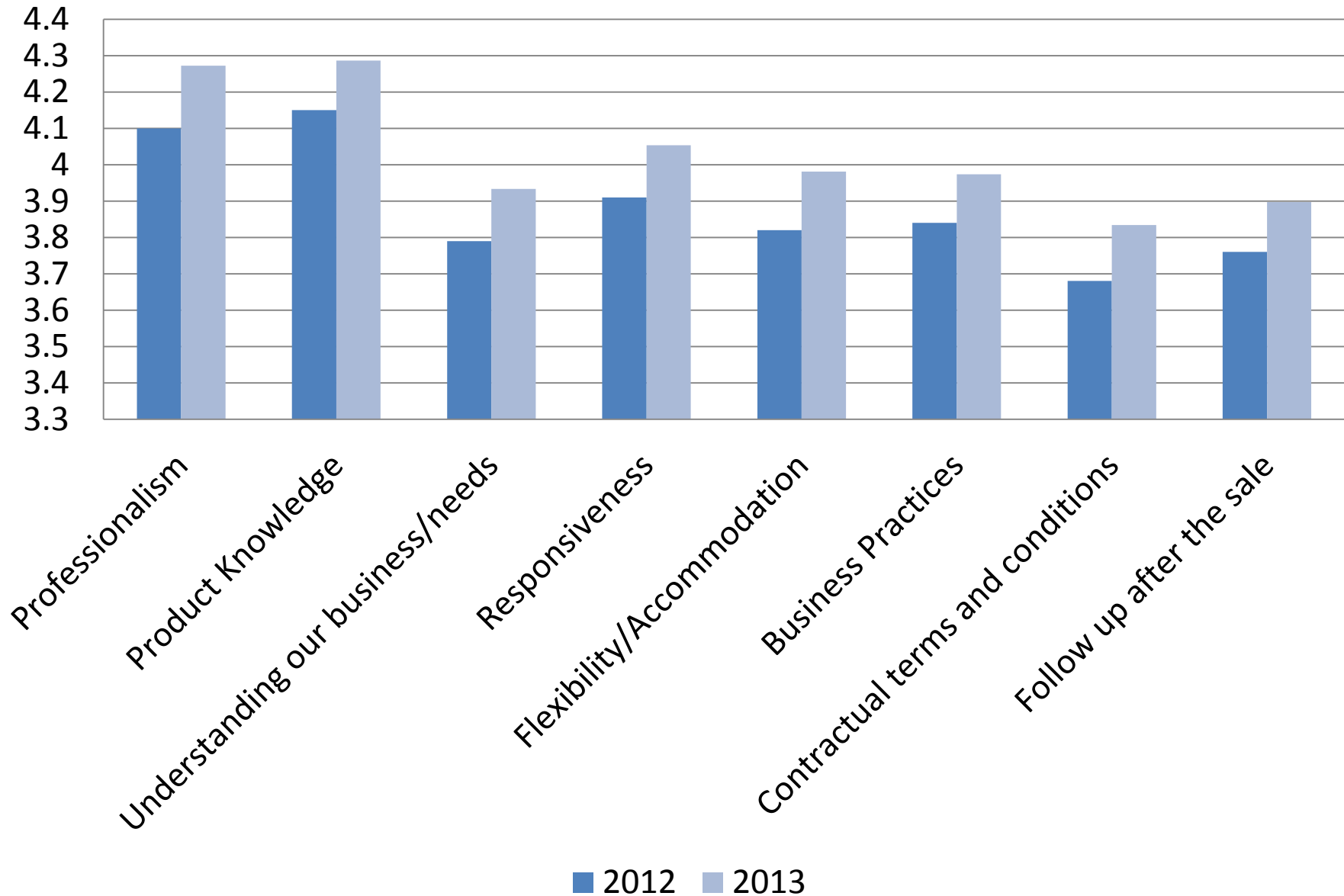
Industry Performance - Value: 2011 - 2013 (Weighted Mean)

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Industry Performance: Quality and Usefulness of Products (Weighted Mean)

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Industry Performance: Technical Support (Weighted Mean)

Legend: ■ 2012 ■ 2013

Categories: Professionalism, Product Knowledge, Responsiveness, Continuity of personnel, Time to resolve problems

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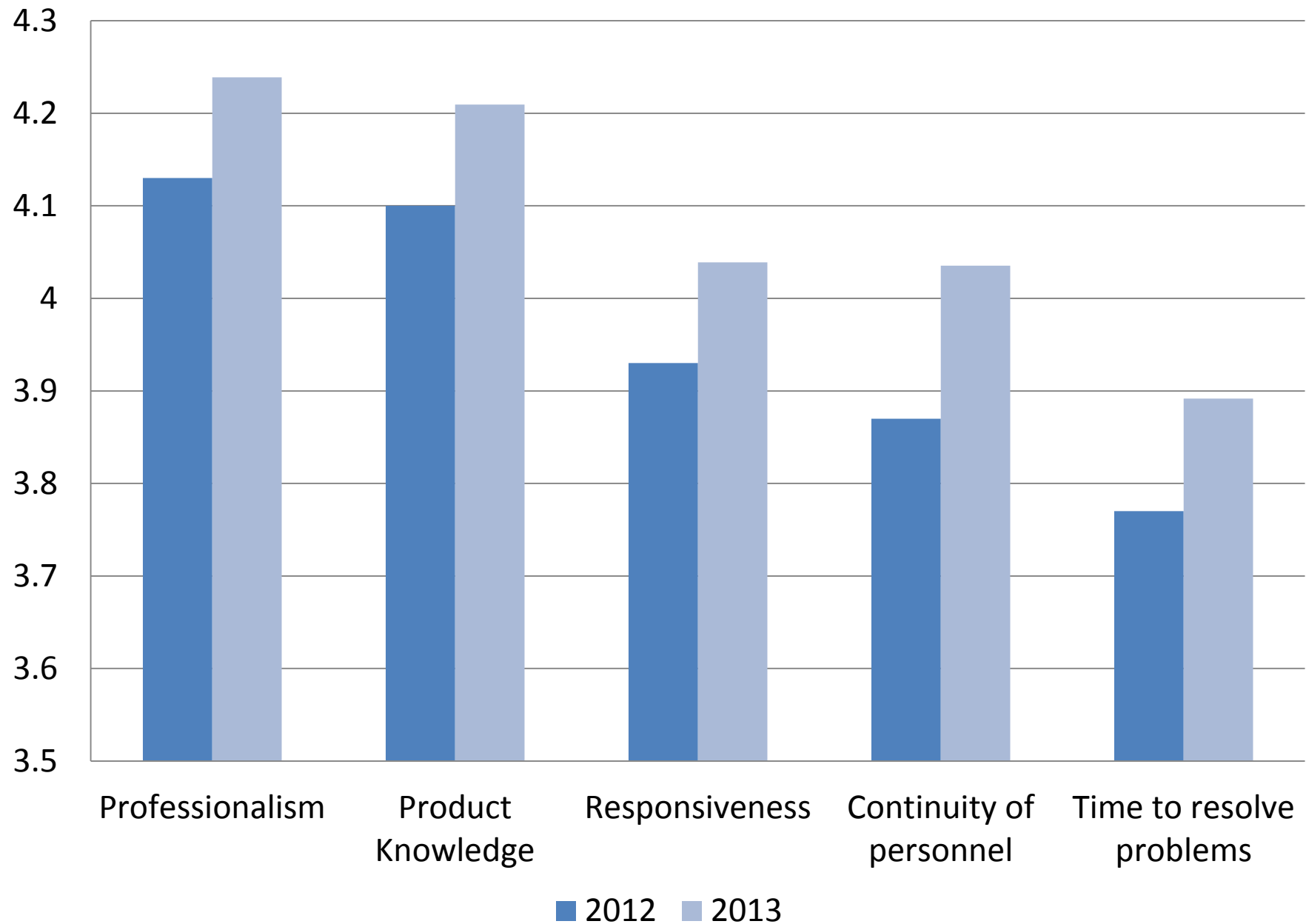
Industry Performance: BI Vendor Consulting (Weighted Mean)

Legend: 2011 (blue), 2012 (red), 2013 (green)

Categories: Professionalism, Product Knowledge, Experience, Continuity, Value

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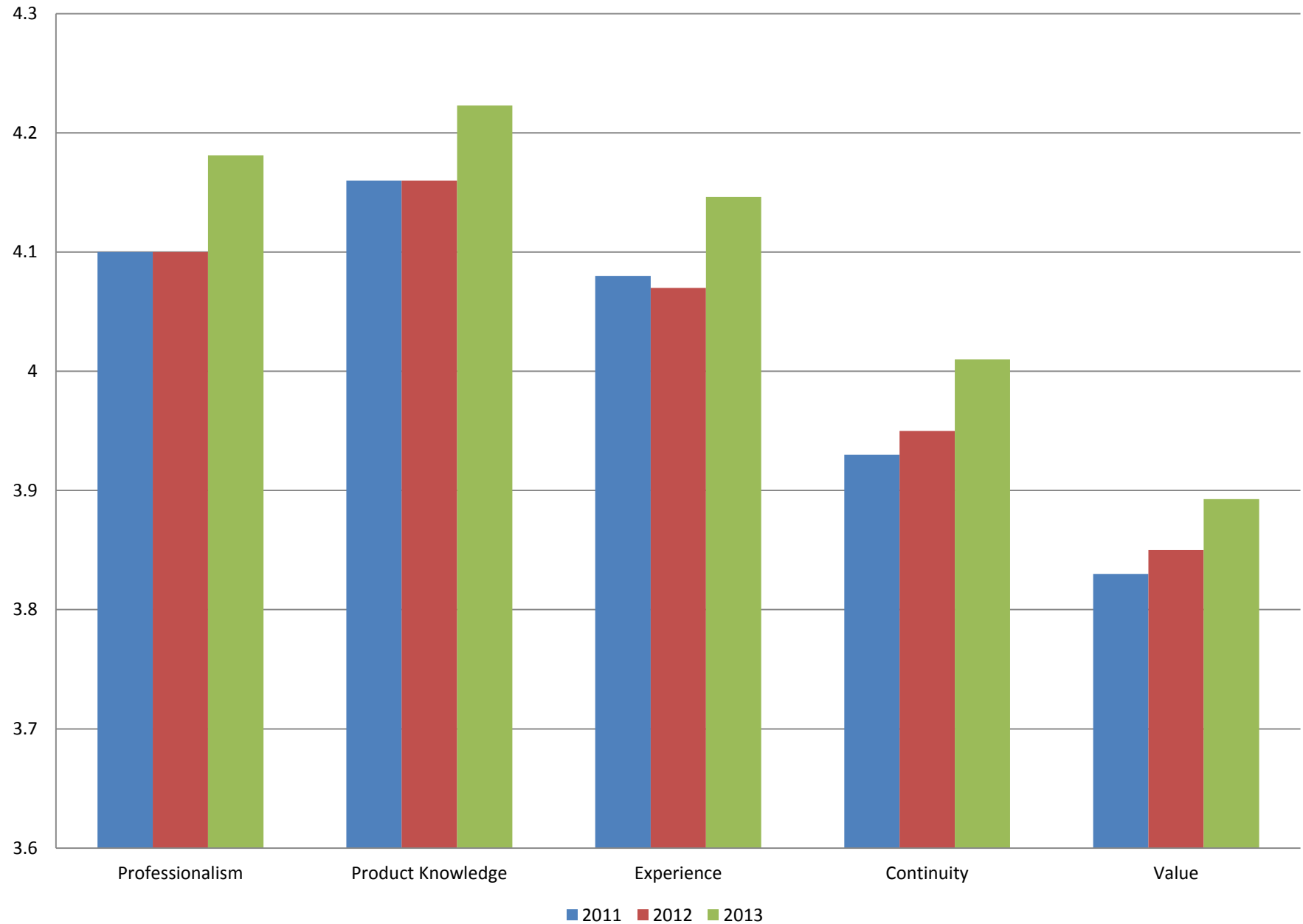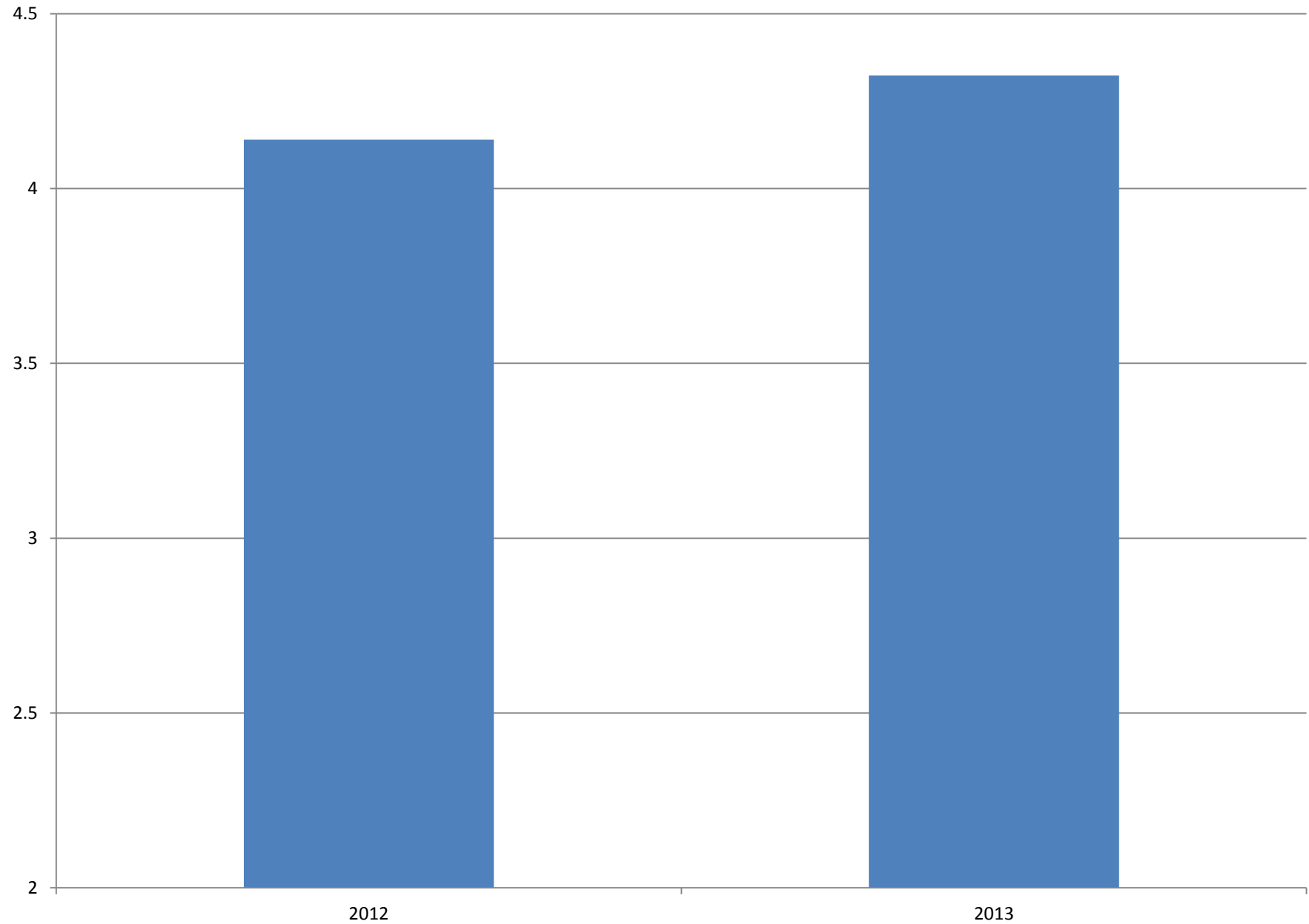
Industry Performance: Recommended (Weighted Mean)

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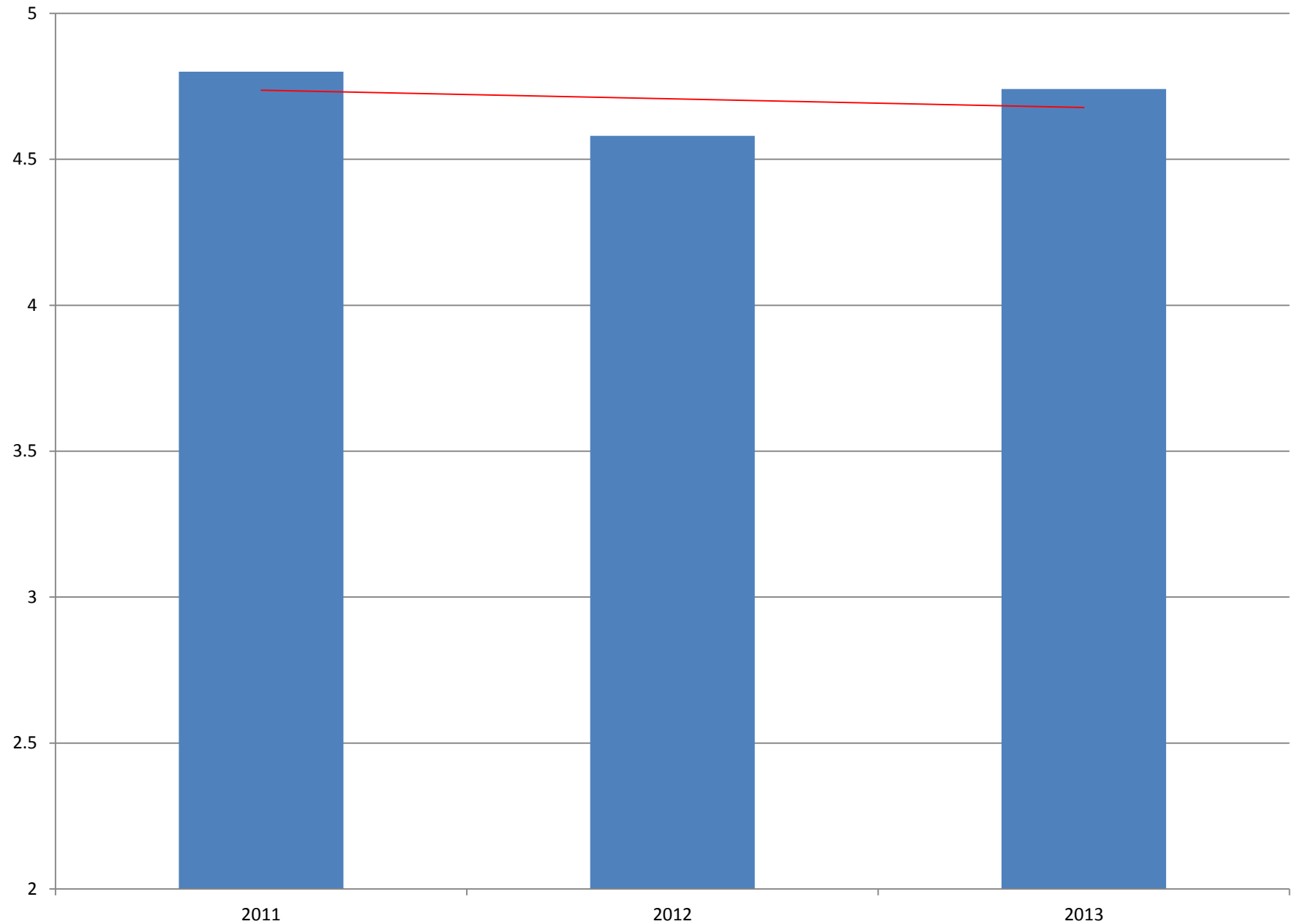
Industry Integrity (Weighted Mean)

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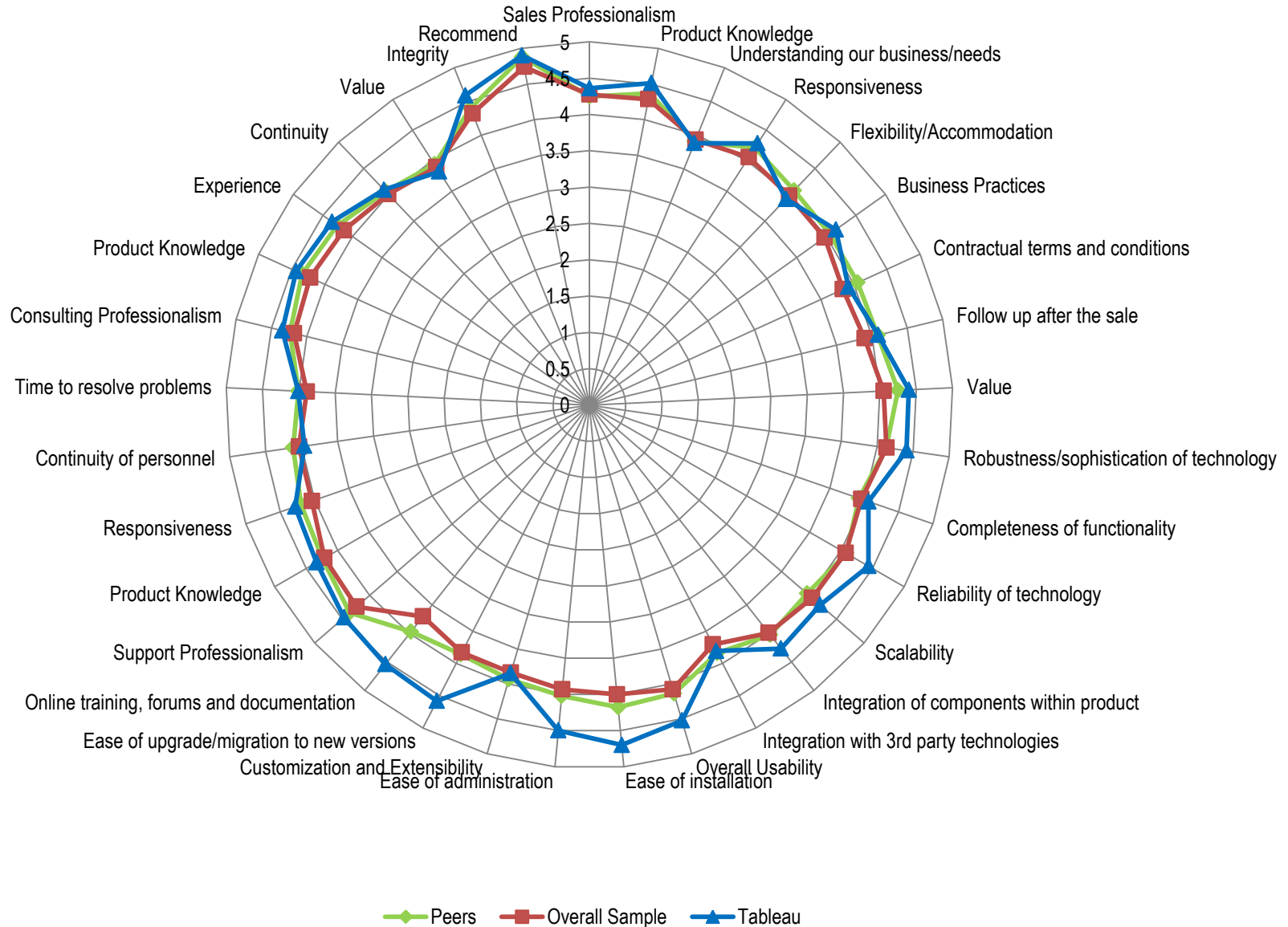
Vendor Stacked Rankings

Stacked Rankings: Growth

Vendor	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

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Detailed Vendor Ratings

Tableau

Peers — Overall Sample — Tableau

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