



May 31, 2023

Dresner Advisory Services, LLC

Wisdom of Crowds[®] Business Intelligence Market Study Excerpt

2023 Edition

Licensed to Cloud Software Group



Benefits of the Study

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

Consumer Guide

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

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

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

Executive Summary

- *Operations, executive management and finance* most often drive business intelligence practices in organizations.
- *Executives*, followed by *managers* and *individual contributors*, remain most targeted for BI; *partner/affiliate* audiences are recently more targeted; *customer* and other targeting audiences are growing in younger BI practices; *successful* BI organizations target broad audiences.
- *Better decision making* is the top *objective* for BI; *efficiency/cost* and *revenue* goals are the next most important. Younger organizations pursue the widest breadth of objectives.
- Top BI *achievements* mirror top BI goals. *Competitive advantage* and *compliance / risk management* are harder to attain.
- *Penetration* of BI within organizations improves over time; expansion plans continue to be bullish. BI success is linked to higher penetration.
- A minority identify *data leadership* in place, mostly in larger organizations. The CDO/CAO role is most common; younger organizations are most flexible with data leader titles; leadership correlates to *BI success*. CDOs / CAOs most often report to CEO and CIO and, increasingly, to CFO.
- The average *number* of BI tools in use is increasing. Company age and size relate to BI tool use.
- *Data security, data quality, and reporting* are the most important BI initiatives. *Sales planning* and *collaboration for group analysis* are gaining.
- *Success with BI* is sustained over time and most often measured via *user feedback*. *Data leadership* improves BI success. Contributors include *management support* and *BI culture*. *Lack of expert resources, culture, and alignment* are top obstacles. BI success *correlates to higher average BI penetration*.
- A majority of organizations are *increasing* BI budgets. Higher budgets correlate to BI *penetration, success, and leadership*. Most BI budget increases are *new spend*. *Internal headcount* is the top budget allocation.
- Most BI tools are in place *five years or less*, and longevity is *increasing*. Longevity increases with BI success and the number of tools in use; most new BI tools are not tool replacements. *Cost, ease of use; and standardization* most often drive BI tool replacement.

Technologies and Initiatives Strategic to Business Intelligence

Familiar BI technologies—*data quality, reporting, dashboards, and data visualization*—follow below newly -added *data security* as the top technologies and initiatives strategic to business intelligence (of 59 topics) under our study in 2023 (fig. 1).

Technologies and Initiatives Strategic to Business Intelligence

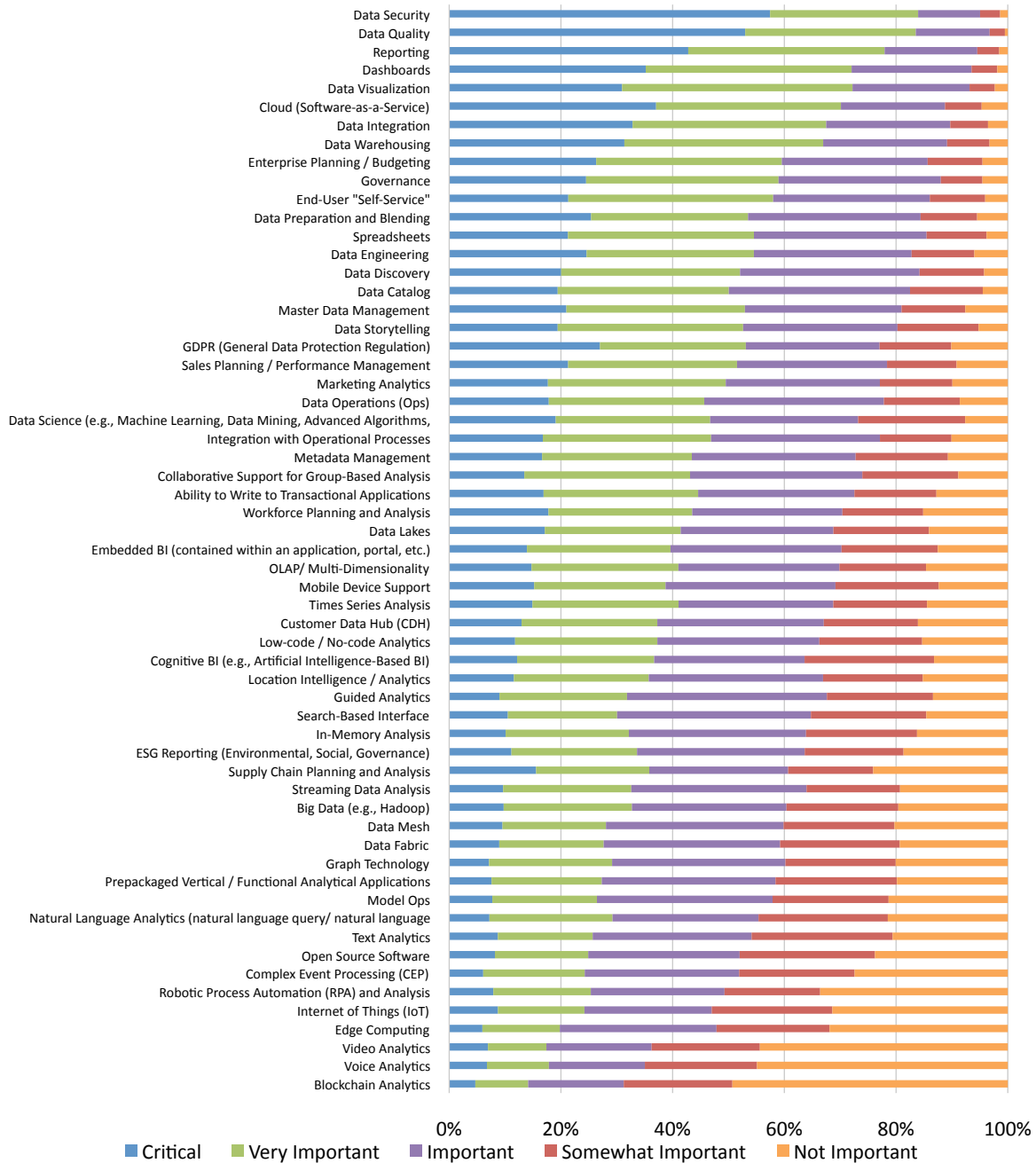


Figure 1 – Technologies and initiatives strategic to business intelligence

Vendor Ratings

In this section, we offer ratings of business intelligence software vendors. We rate vendors using 33 different criteria, on a five-point scale for each. Criteria covers sales /acquisition experience (8 criteria), value for price paid (1), quality and usefulness of product (12), quality of technical support (5), quality and value of consulting services (5), whether the vendor is recommended (1), and integrity (1).

As we explore vendor performance in more detail, it is important to understand the scale we use in scoring the industry and vendors:

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

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

Detailed Vendor Ratings

In this section, we offer detailed vendor scores. Using our 33-criteria evaluation model (table 1), we compare each vendor’s performance to its previous year’s performance and to the average for all vendors (all records in the study population).

The detailed criteria are below. We add “clock” position information to assist in locating specific scores.

Table 1 - Detailed vendor rating criteria

<ul style="list-style-type: none"> - Sales/acquisition experience (12 - 2 o'clock) <ul style="list-style-type: none"> o Professionalism o Product knowledge o Understanding our business/needs o Responsiveness o Flexibility/accommodation o Business practices o Contractual terms and conditions o Follow-up after the sale - Value for price (3 o'clock) - Quality and usefulness of product (3 - 7 o'clock) <ul style="list-style-type: none"> o Robustness/sophistication of technology o Completeness of functionality o Reliability of technology o Scalability o Integration of components within product o Integration with third-party technologies o Overall usability o Ease of installation o Ease of administration 	<ul style="list-style-type: none"> - Quality and usefulness of product (continued) <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> o Professionalism o Product knowledge o Experience o Continuity o Value - Integrity (11 o'clock) - Whether vendor is recommended (12 o'clock)
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ibi Detailed Score

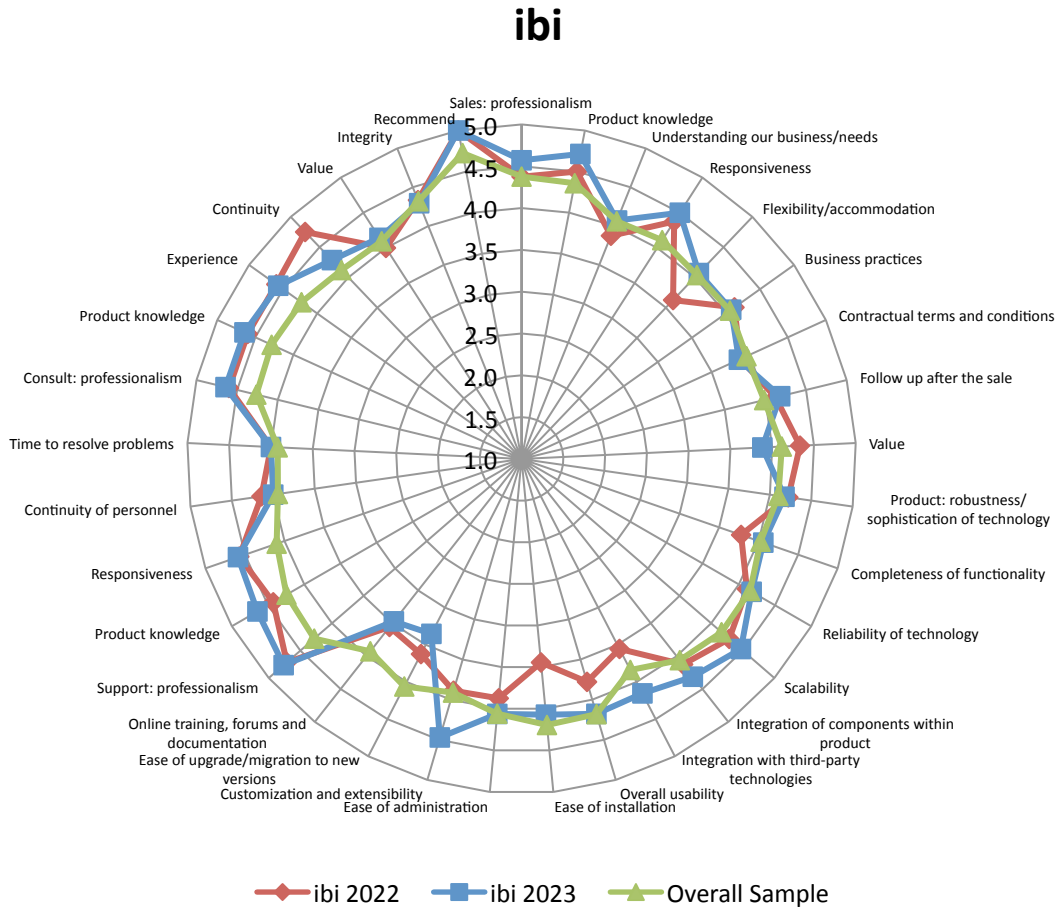


Figure 2 – ibi Software detailed score

In 2023, TIBCO spun Information Builders (ibi) out as a separate operating entity and brand. Compared to 2022, ibi’s performance is generally above the overall sample for most measures, with key improvements for most product measures and a number of sales, technical support, and consulting measures. It is an Overall Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. It maintains a perfect recommend score.

Customer Experience Model

The customer experience model considers the real-world experience of customers working with BI products on a daily basis (fig. 3). For the x axis, we combine all vendor touch points—including the sales and acquisition process (8 measures), technical support (5 measures), and consulting services (5 measures)—into a single “sales and service” dimension. On the y axis, we plot customer sentiment surrounding product, derived from the 12 product and technology measures used to rank vendors. On the resulting four quadrants, we plot vendors based on these measures.

The upper-right quadrant contains the highest-scoring vendors and is named Overall Experience Leaders. Technology Leaders (upper-left quadrant) identifies vendors with strong product offerings but relatively lower services scores. Contenders (lower-left quadrant) would benefit from varying degrees of improvement to product, services, or both.

User sentiment surrounding Outliers (outside of the four quadrants) suggests that significant improvements are required to product and services.

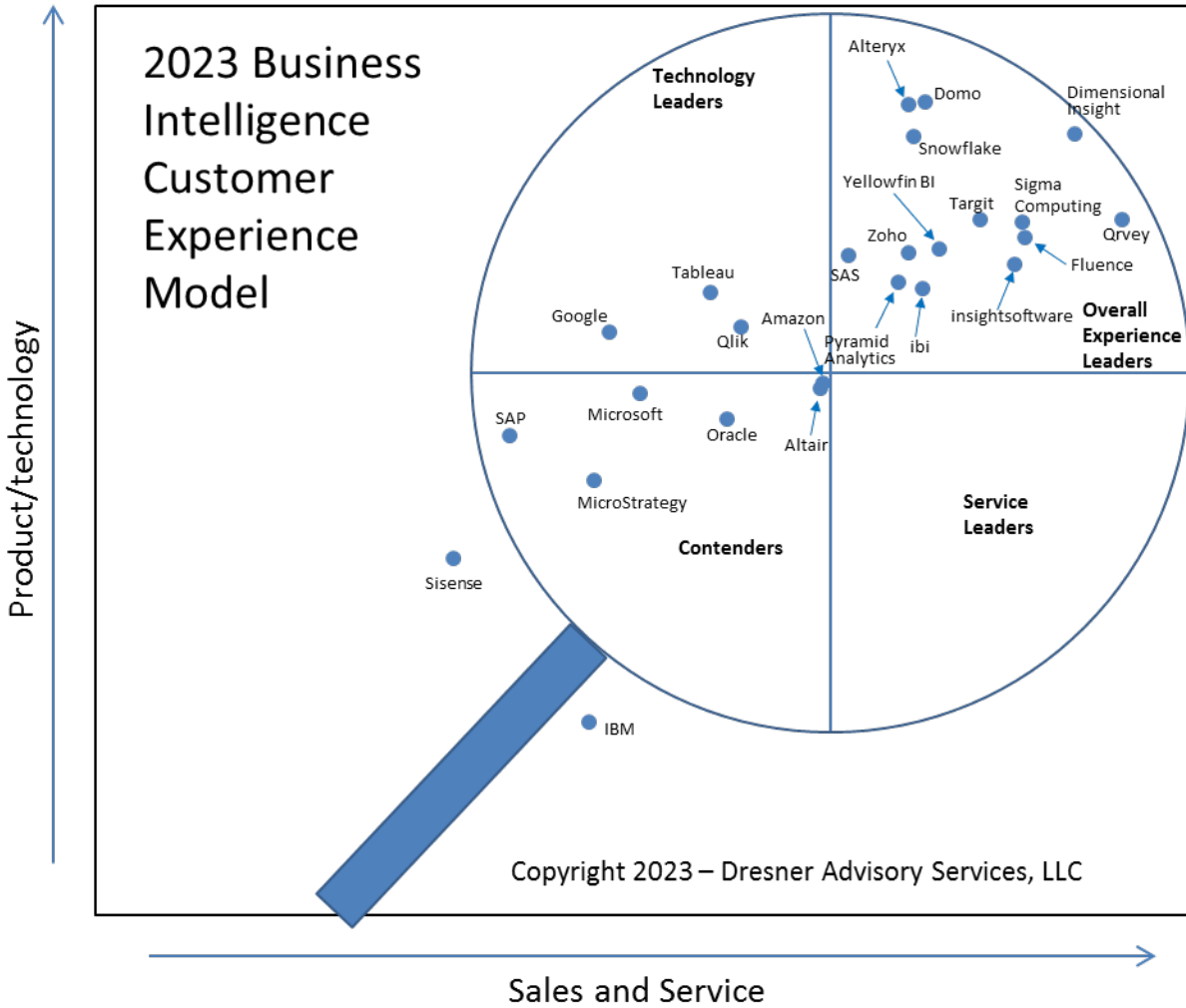


Figure 1 – Customer experience model

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



published two books on the subject, *The Performance Management Revolution – Business Results through Insight and Action* (John Wiley & Sons, Nov. 2007) and *Profiles in Performance – Business Intelligence Journeys and the Roadmap for Change* (John Wiley & Sons, Nov. 2009). He lectures at forums around the world and is often cited by the business and trade press.

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

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

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

Other research reports include:

- Analytical Platforms
- Cloud Computing and BI
- Data Catalog
- Data Engineering
- Embedded BI
- Guided Analytics
- ModelOps
- Self-Service BI

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

About Jim Ericson

Jim Ericson is a Research Director with Dresner Advisory Services.

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

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



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

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

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