



May 30, 2019

Dresner Advisory Services, LLC

Wisdom of Crowds[®] Business Intelligence Market Study (Excerpt)

Please see the full report available on www.microstrategy.com/dresner-woc-fa for complete findings and information on data collection and scoring methodology, demographics, and author biographies.

Tenth Anniversary Edition

Licensed to MicroStrategy



Executive Summary/ Key Findings

- Operations and Executive Management are the most influential functional drivers of business intelligence in all organizations of any size.
- Executives and managers remain the most targeted audience for BI, though attention is shifting downstream.
- Organizations are distributed in their use of one, two, three, four or more BI tools; larger organizations usually use more BI tools.
- Large majorities are increasingly confident in their "state of data" (up noticeably in 2019) but less confident in their ability to "act on insight".
- Net BI product replacement is 27 percent in 2019, most often for reasons of functionality.
- In 2019, Executives remain the most likely primary (64 percent) and overall users of business intelligence, followed by Middle Managers and Line Managers. Targeting thereafter trails toward other BI audiences. That said, Individual Contributors / Professionals are nonetheless almost as likely as line or middle managers to be primary or secondary targets (75 percent).
- As organizations' headcount rises above 100, they are considerably more likely to target Managers and Individual Contributors.
- In an ongoing (and positive) development, the penetration of business intelligence (as a percentage of total employees) continues to improve over time. Penetration of BI in the years 2015 and 2019 finds low-level penetration decreasing as higher levels climb. The top three levels of penetration (> 40 percent) now count more than one-third of potential users empowered, compared to about 27 percent in 2015. During the same time, penetration of 20 percent or less falls from 57 percent to 39 percent. If not at a dramatic pace, the trending in this finding gives us some confidence that the BI enablement and democratization continues to show improvement.
- By a small margin, chief data officers are a bit more likely to report to the CIO than are CAOs. It is worthwhile to note that Marketing, often mentioned as the "tip of the spear" of analytic activities, is by far least likely to have reporting oversight of the CAO, and even less, the CDO.

- For a sixth year, we polled respondents for attitudes and behaviors reflective of the “state of data” in their organizations. As their choices describe, a large majority (70 percent) of organizations say they either see data as “truth” or maintain "a common view of enterprise data" limited by parochial views and semantics. Nineteen percent report consistent "department-level data." Eleven percent report the worst state of data, "multiple inconsistent data sources with conflicting semantics and data." Finance is less likely than most other functions to report "data as truth".
- [Success with business intelligence correlates directly and powerfully to an organization’s state of data.](#)
- We asked organizations (regardless of success) whether they will increase, decrease, or maintain existing business intelligence budgets. In 2019, more than half (55 percent) of respondent organizations plan to increase BI investment, while just 6 percent will decrease BI budgets from 2018 levels.

Scoring Criteria

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

Vendor Ratings

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

MicroStrategy Detailed Score

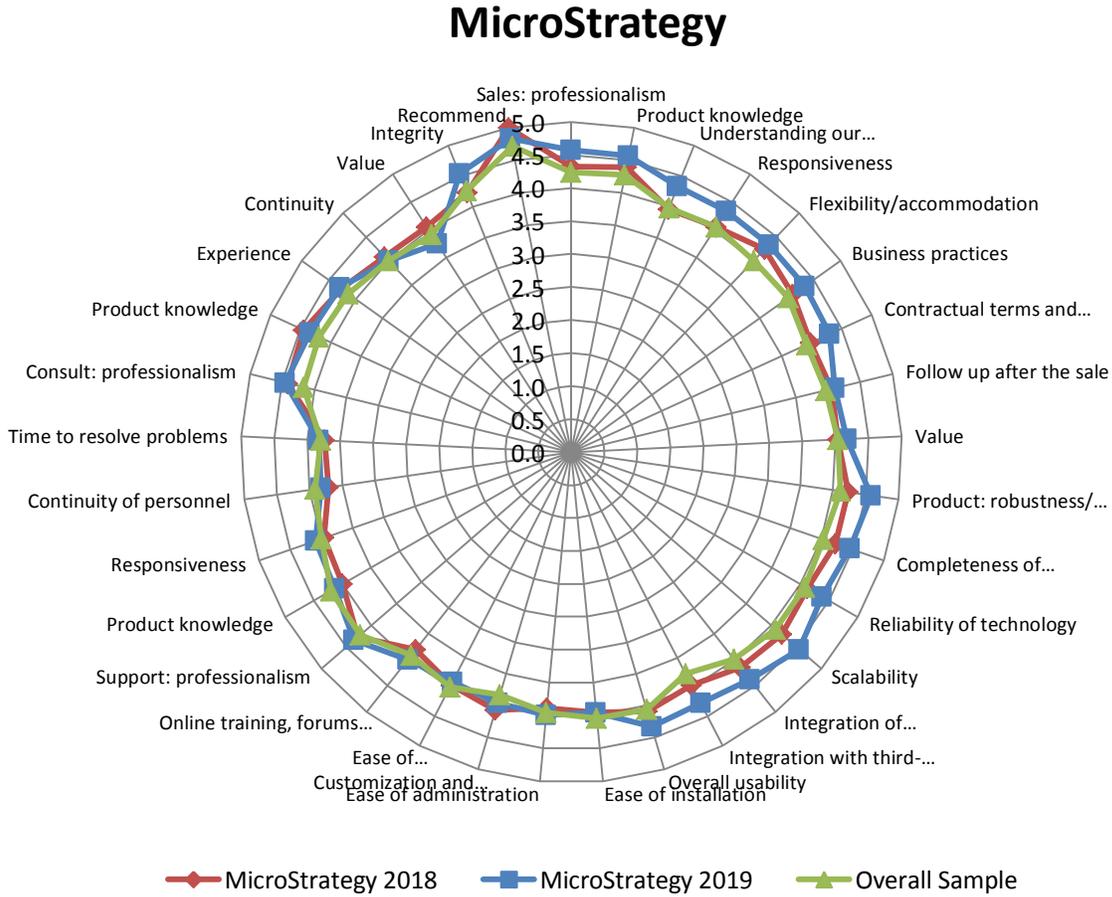


Figure 1 – MicroStrategy detailed score

In 2019, MicroStrategy shows continued performance improvements across sales, product, value, and technical support categories. Its scores are generally above or in line with the overall sample and is considered an overall leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model.

Business Intelligence Market Models

Customer Experience Model

The customer experience model considers the real-world experience of customers working with BI products on a daily basis (fig. 1). 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.

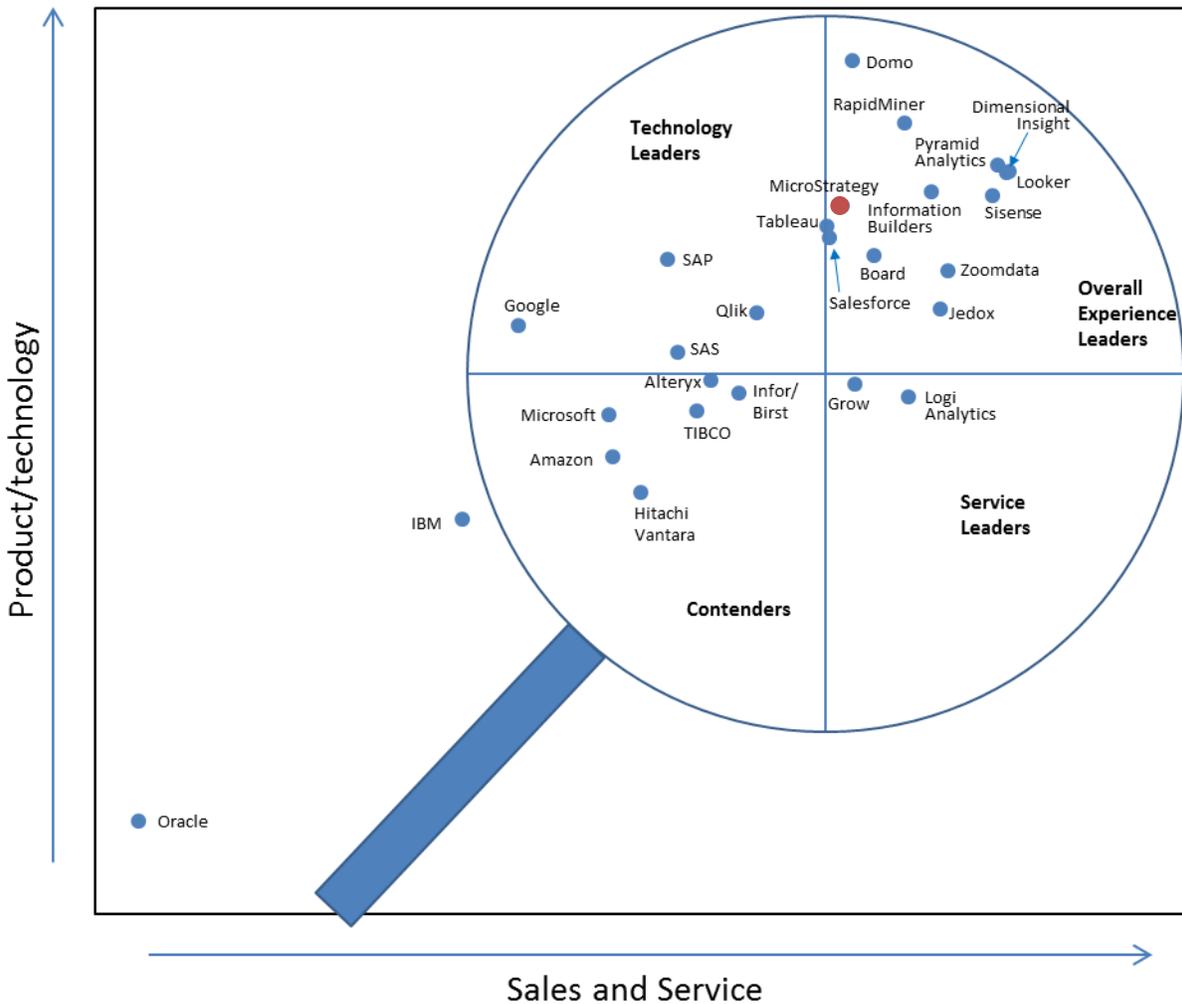


Figure 2 – Customer experience model

Vendor Credibility Model

The vendor credibility model considers how customers “feel” about their vendor (fig. 2). The x axis plots perceived value for the price paid. The y axis combines the integrity and recommend measures, creating a “confidence” dimension. The resulting four quadrants position vendors based on these dimensions.

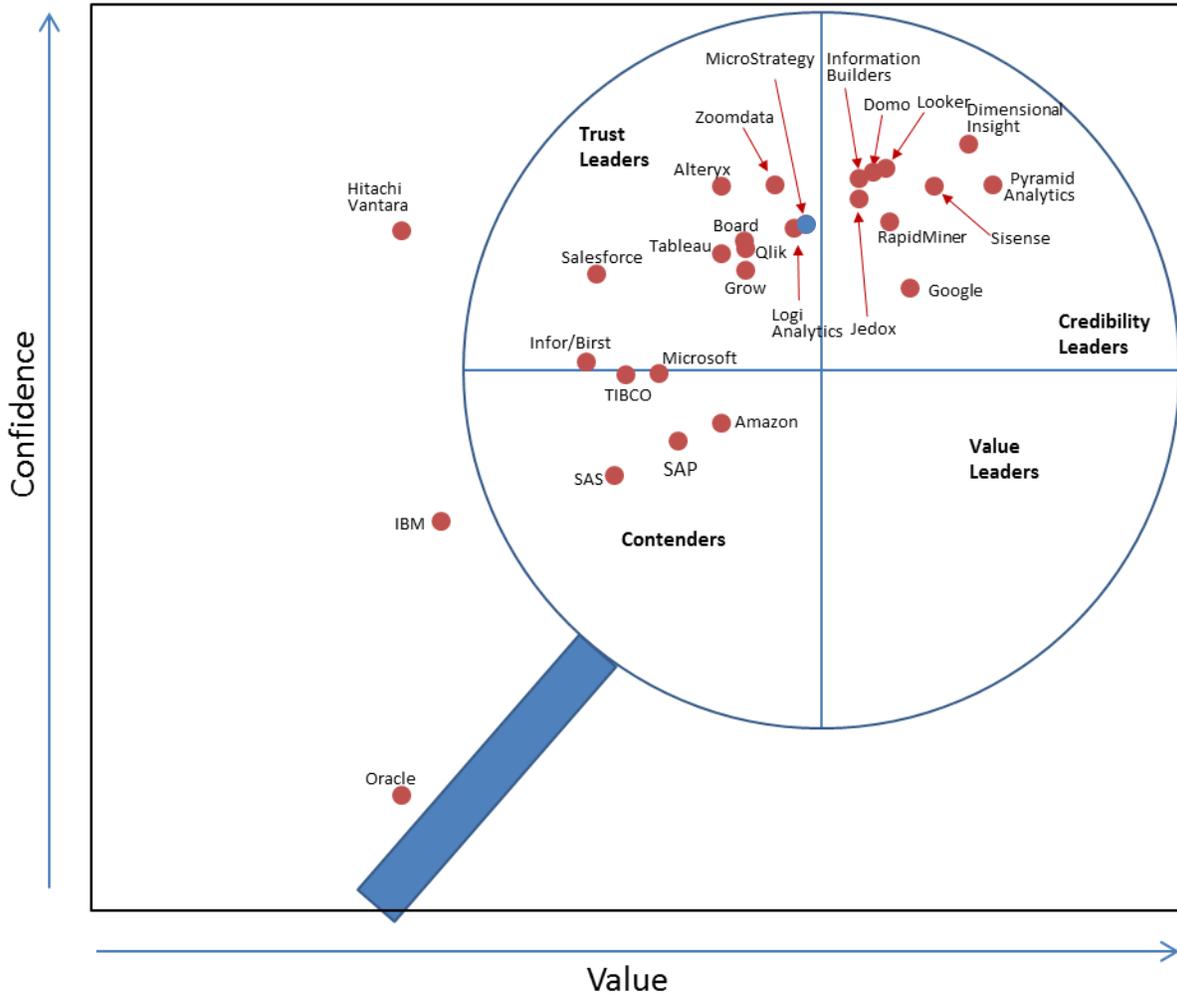


Figure 3 – Vendor credibility model