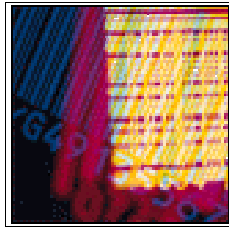


Enhancing Customer Value from Business Intelligence/Analytics Applications and Services



2005 Brand Tracking Study

The business intelligence and analytics (BIA) market is attractive—underpenetrated and growing fast. As enterprise buyers become more adept at using enterprise applications, look for efficient and effective ways to ensure regulatory compliance, and seek to gain unprecedented insight into their customers, BIA providers have gained access to a whole new market: the business user. Improving usability for these non-experienced users has become a top priority, but providers must also be sure that they are able to build awareness and credibility with this new audience without alienating the IT department.

This study investigates the changing buyer landscape for the BIA market, with a firm focus on how customers choose their BIA providers and integrators, which firms garner the highest regard, and how effectively firms are meeting customer expectations.

REPORT HIGHLIGHTS

OVERVIEW

ITSMA's *Enhancing Customer Value from Business Intelligence/Analytics Applications and Services* benchmarks the brand equity of full-suite application providers, integrators, and niche application developers. It also explores the customer decision process for buying enterprise BIA software solutions and services.

In particular, the report addresses issues such as:

- What priorities drive the decision-making process when large and midsize firms and institutions buy BIA software applications and services?

- What marketing investments will be most effective in building brand and improving competitive position?

Key topics highlighted in the report include:

How Customers Choose

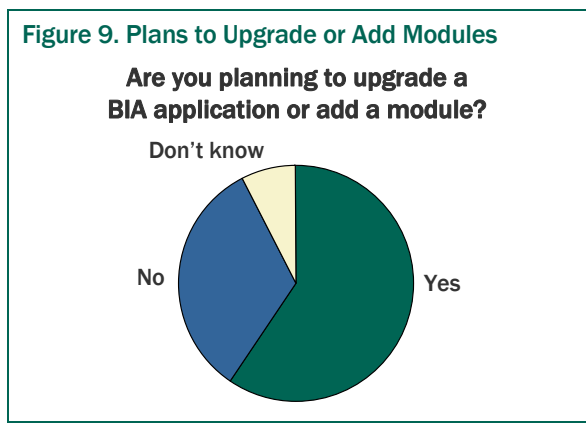
- Do buyers evaluate solutions based primarily on the features and functionality of the software or on the quality of the services provided?
- Do buyers prefer full-suite providers or application specialists?
- Do buyers want to work directly with software vendors or with third-party integrators?

(Continued)

- **Brand Equity**
 - Which BIA solutions have the highest brand equity?
 - How familiar are buyers with specific BIA firms?
 - Do niche vendors, full-suite providers, or third-party integrators score higher in terms of favorability?
- **Effective Marketing**
 - What are the most important provider attributes?
 - Which companies are meeting customer expectations?
- **Purchasing Preferences**
 - How popular is outsourcing, application hosting, and offshoring?
 - How do buyers prefer to manage their enterprise software applications?
 - Are customers seeking rapid-method implementations?

RESPONDENT DEMOGRAPHICS

Job Title	
Director	66.7%
Vice President	26.3%
General Manager/CXO	7.0%
Industries Represented	
Manufacturing	29.9%
Government	20.0%
Financial services	20.0%
Retail/distribution	6.8%
Communications	5.0%
Other	18.3%



STUDY SCOPE

ITSMA's *Enhancing Customer Value from Business Intelligence/Analytics Applications and Services* explores the impact of:

- **Job category/perspective.** IT, business.
- **Industry.** Government, financial services, manufacturing, retail/distribution, communications, other.
- **Size of company (number of employees).** Ranges are 100–999; 1,000–4,999; 5,000 or more.
- **Stage of implementation.** Pre-implementation, currently implementing, post-implementation.
- **Preferred degree of vendor specialization.** Full-suite or specialist.

When asked to evaluate brand equity, attributes, and positioning, interviewers directed respondents to focus on nine full-suite providers plus two specialist firms in the BIA application area. (Note: Data was collected prior to Oracle's recent acquisition of PeopleSoft.)

- **Full-suite providers or integrators.** Accenture, BearingPoint, Capgemini, Deloitte, IBM, Microsoft, Oracle, PeopleSoft, SAP
- **BIA specialists.** Cognos, Hyperion

STUDY METHODOLOGY

ITSMA conducted telephone-based interviews in the United States with 501 IT and business executives involved in the purchase of software applications and solutions as part of a larger study on the enterprise software applications market as a whole, *Enhancing Customer Value from Enterprise Software Applications and Services: 2005 Brand Tracking Study*. ITSMA designed the interviews, which took place from late 2004 through early 2005, to assess the brand awareness and market positioning of the major software application services providers and explore key market drivers. The survey instrument resides in the study's appendix.

ITSMA separately examined the answers of 100 respondents who were asked their opinions and experiences as they related specifically to their perceptions of BIA application suite and services providers.

Study respondents all held director, vice president, or C-level positions and represented organizations in multiple major industries with revenue or operating budgets ranging from \$300 million to over \$20 billion.

The study was sponsored by IBM, SAP, and Capgemini.

MORE INFORMATION

To learn more about the report, contact Rob Leavitt, Vice President, Marketing and Member Advocacy at +1-781-862-8500, ext. 45, or rleavitt@itsma.com.

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ILLUSTRATIVE DATA FROM ITSMA'S ENHANCING CUSTOMER VALUE FROM ENTERPRISE BUSINESS INTELLIGENCE/ANALYTICS APPLICATIONS AND SERVICES [BSS001B]

Figure 21. Mean Likelihood to Consider BIA Application Hosting or Management Services

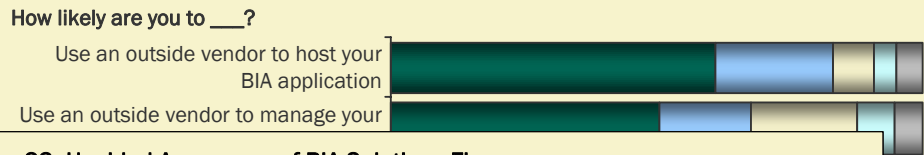


Figure 23. Unaided Awareness of BIA Solutions Firms

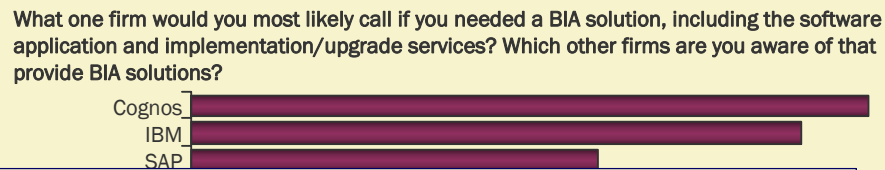
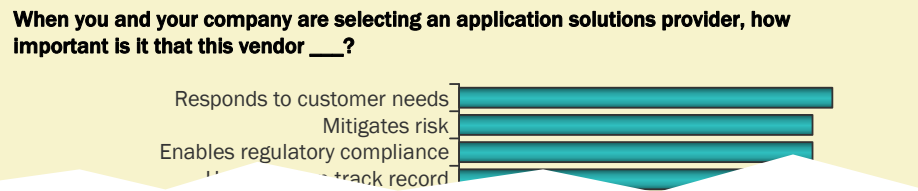


Figure 28. Mean Importance Ratings of Software Application Firms' Attributes





RESEARCH ORDER FORM

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