

SUMMARY RESULTS FROM THE BI SURVEY 10

The BI Survey is the Most Comprehensive Independent Survey
of the On-Line Analytical Processing and Business Intelligence Market



MicroStrategy®

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For more information about The BI Survey 10, please visit:

www.bi-survey.com

OVERVIEW OF THE BI SURVEY 10

The BI Survey is the world's most comprehensive independent survey of the Business Intelligence (BI) market space and products and is conducted annually by the Business Application Research Center (BARC). The web address is www.BARC-research.com. The BI Survey 10 follows nine successful editions of The BI Survey and compiles the real-world BI experiences of 2,961 organizations across over 80 countries. The BI Survey 10 was conducted with the following geographic split: North America 23%, Europe 64%, and rest of world 13%. Survey respondents were from 32 different industries. The following four industries comprised 75% of respondents: manufacturing, services, retail and wholesale, and financial services. Regarding company size, the median employee count was 955 and the mean employee count was 10,108.

The BI Surveys provide insight into actual BI implementation experiences as well as the usage patterns and technical characteristics of the most popular BI products. The BI Surveys examine how companies choose their BI products, how they use these products, and how successful they are with them. The Survey is also notable in that it takes on challenging issues not covered by typical BI product reviews, such as barriers to wider deployments and factors leading to product discontinuance. As a result, the Survey is uniquely positioned to detail BI purchasing and deployment best practices.

While other BI product surveys and analyst product reviews exist, they are largely based on the perceptions of the reviewer and do not have the statistical rigor of The BI Survey. The BI Survey conclusions are solely based on statistical analysis of information provided by respondents. This year, statistically-significant data was collected about 26 different BI products. Each of these 26 BI products was analyzed across 33 KPIs. Products analyzed in descending order of number of customer organizations responded, QlikTech (182), BOARD (152), Phocas (147), MicroStrategy (129), Microsoft SQL Server Analysis Server (SSAS) (100), Jedox (87), Tableau (87), SAP BW BEx Suite (83), IBM Cognos BI (79), Bissantz (71), Cubeware (71), arcplan (69), Information Builders (68), TARGIT (68), SAP BO WebI (62), MIK (59), Panorama (50), Jaspersoft (47), Oracle OBIEE (47), Cyberscience (46), Microsoft SSRS (46), SAS (42), Dimensional Insight (41), Evidanza (41), IBM Cognos TM1 (39), and Oracle Hyperion (33).

The BI Survey 10 separately analyzed the platforms of the six largest BI platform vendors: MicroStrategy, SAP BusinessObjects, SAP BW / BEx, Oracle BIEE, IBM Cognos, and Microsoft SSRS to make direct comparisons within a like group of vendors typically considered for similar types of BI applications and to account for multiple product offerings within a product suite.

The BI Survey is 100% independent of any BI vendor influence and was not commissioned, funded, suggested, or sponsored by vendors in any way. Vendors had no input into the questions or into the analysis of Survey results. Therefore, business intelligence consumers can be reassured that the survey accurately reflects real-world experiences of individuals in companies like theirs and is free from vendor influence and author bias.

While The BI Survey 10 asked many of the same questions as previous years to allow for year-over-year comparisons, some KPIs have changed. These changes are indicated below as appropriate. All survey results are provided in absolute terms (based off the weighted average of the entire set of vendors) to make product

comparisons within each of the 33 KPIs more consistent. Results for each of the KPIs are normalized so that the overall product sample always has a weighted average value of 1.0. Each KPI chart runs from the lowest performing product, at the bottom, to the highest performing product at the top.

Are The The BI Survey 10 results consistent with the trends from the prior 9 years?

There are widely ranging results between vendors and most of these findings are consistent with prior year survey findings. Interestingly, the same vendors which outperformed this year have outperformed the market over the prior nine years the survey has been conducted. Similarly, the set of vendors who did not generally fare well this year have generally never fared well in the nine years of the survey.

Specifically, MicroStrategy has scored at, or very close to, the top in Business Benefit, Overall Competitiveness, Vendor Support, and across all Scalability and Performance categories for ten years running. In contrast, SAP BO has been at or near the bottom in these same categories over the same ten year timeframe.

Are the differences between the mega-vendors and an independent vendor like MicroStrategy significant?

Based on the survey results, significant differences exist between the mega-vendors and independent vendors like MicroStrategy. As an independent, or “Best-of-Breed”, vendor MicroStrategy is wholly focused on BI, optimized for open systems solutions and has grown completely organically. Conglomerate or “mega-vendors” are vendors (SAP BO, IBM Cognos, Oracle and Microsoft) that offer a full enterprise software stack, optimize their BI offerings for their software stack and grow by acquisition.

As can be seen in the following pages, the mega-vendors often score lower than independent vendors like MicroStrategy. Furthermore, MicroStrategy outperformed the conglomerate vendors in most key areas such as Business Benefit, Product Quality, Support Quality, and Query Performance among others.

How important is product response time and performance?

The BI Survey 10 looked closely at the impact of query performance and found, as in every year the survey has been conducted, the most frequently-reported product problem and the biggest deterrent to wider deployments continues to be poor query performance. If users have to wait too long every time they run a query, they become frustrated and adoption is poor. As expected, The BI Survey 10 also found that fast query performance continues to be amongst the most frequently selected selection criteria for software. According to The BI Survey 10, “sites that used query performance as a selection criterion were more successful in business terms than those that did not.”¹ Organizations should prioritize query performance as a key criterion in their vendor selection to maximize overall project success. As BARC says, “...query performance is the most important single product-related criterion for choosing a [BI] product.”²

1 BARC “The BI Survey 10 The Results” by Melanie Mack and Bernie Finucane, January, 2012

2 BARC “The BI Survey 10 Best Practices” by Melanie Mack and Bernie Finucane, January, 2012

How should organizations select products?

The BI Survey 10 looked at the impact of multi-product competitive evaluations on project success. Once again, BI projects based on a multi-product competitive evaluation and selection process achieve far more business benefits than those based on a single product selection or no formal product evaluation. All of the eleven discrete business benefits tracked (see Figure 6) improve when competitive, multi-product evaluations are performed. Vendors such as BO and Oracle, which are selected most often for corporate reasons, such as product bundling, without a multi-product competitive evaluation achieve low scores in all of the business benefit and project success areas analyzed.

What should organizations look for in a product?

The BI Survey 10 found that organizations that used product-related selection criteria had more successful projects than those that used vendor-related commercial factors. Most organizations choose a product for its capabilities rather than the vendor for its name. According to the BI Survey 10 results, business benefits from a BI tool were most affected by fast performance, functionality/product features, ease of use for end-users, integrates with other products, and ease-of-use for application builders.

The BI Survey 10 shows there is a high correlation between product selection and business benefit achieved. Customers overwhelmingly purchase MicroStrategy for product specific reasons; performance, ease-of-use and data and user scalability. In contrast, customers tend to purchase BO for corporate reasons; the SAP name and perceived integration with the SAP stack.

The BI Survey 10 Summary Results

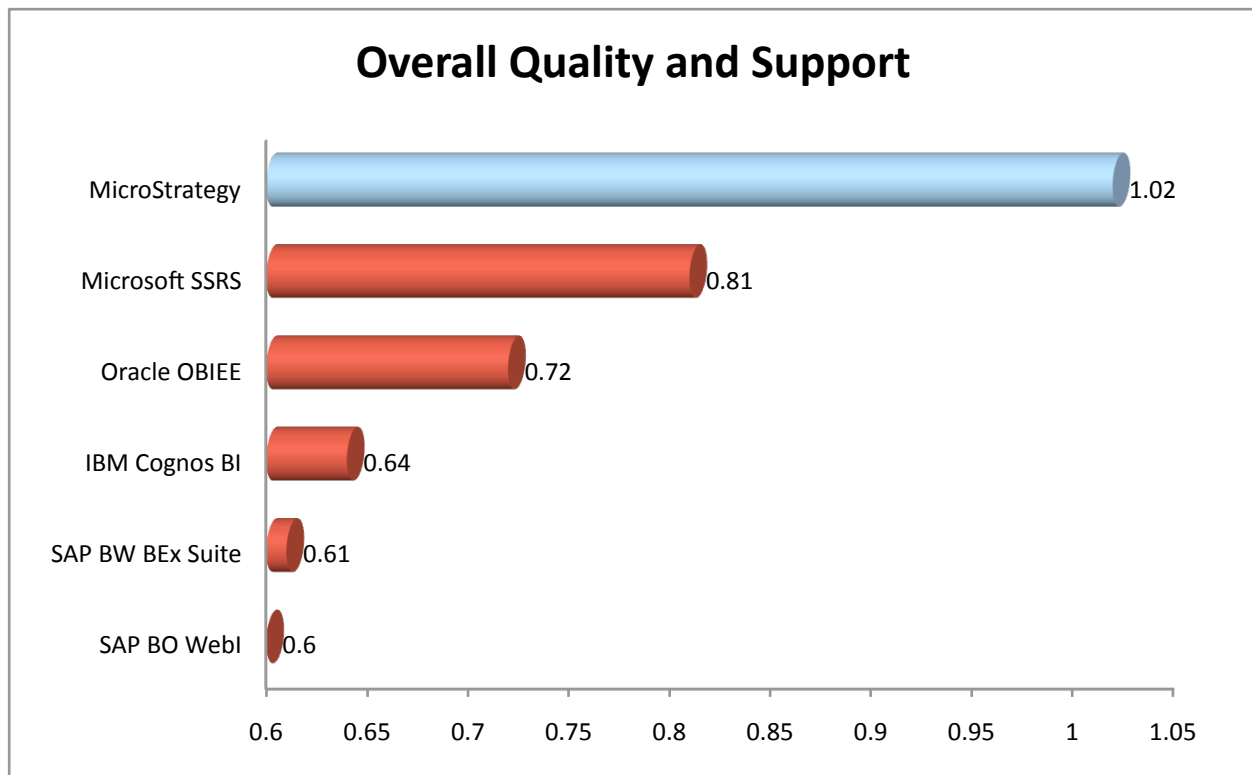
This document evaluates MicroStrategy against a select group of peers. This peer group represents the set of products that are typically considered for similar types of enterprise BI applications and consists of MicroStrategy, SAP BusinessObjects, IBM Cognos, Oracle OBIEE, Microsoft SSRS and SAP BW. The document evaluates the peer group across a number of the KPIs analyzed in The BI Survey 10. The KPIs presented here are grouped into three critical areas to allow the reader to quickly assess how the BI platform products perform in real-world deployments:

- Vendor Relationship
- Business Value
- Product Performance

VENDOR RELATIONSHIP

Overall Quality and Support

This KPI is an aggregate of product quality and vendor support. These two KPIs are clearly related since a poor quality product requires higher levels of support. MicroStrategy's high score in this KPI thus indicates a high quality product with strong support.



Source: The BI Survey 10 KPI Dashboard

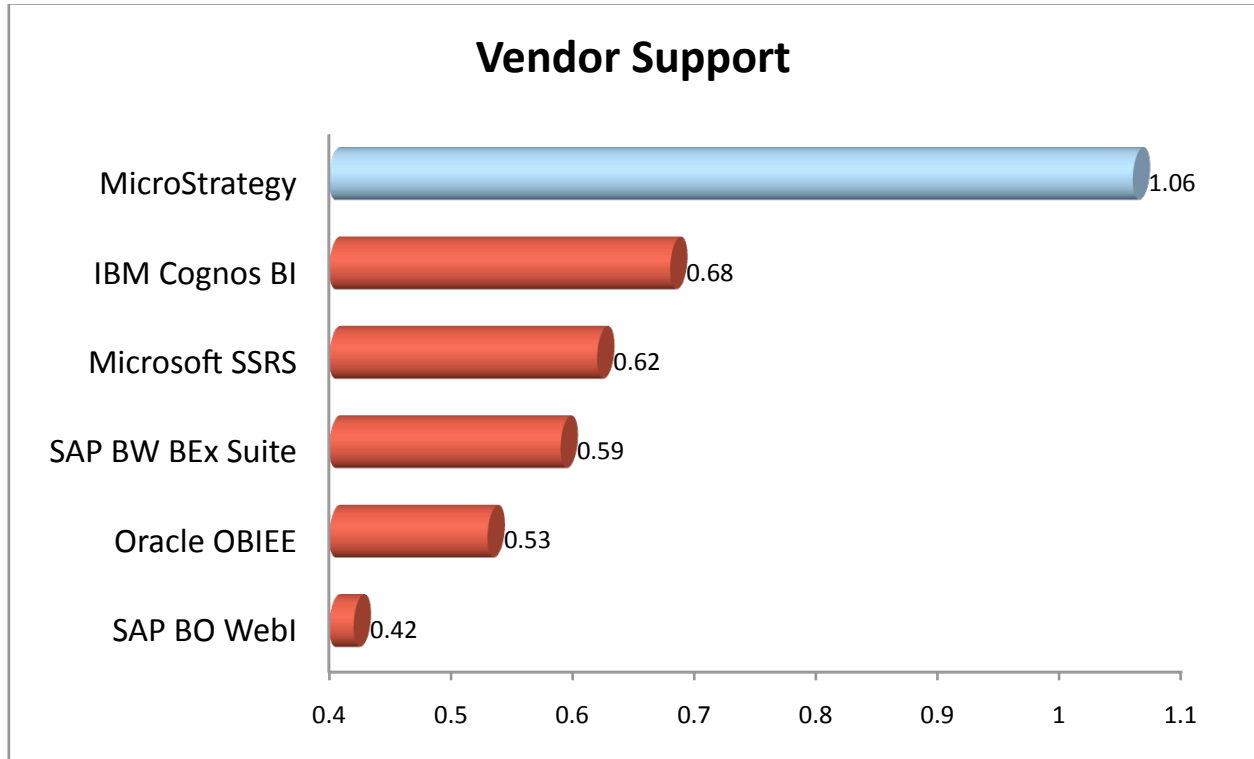
Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 1: Overall Quality and Support for the Select Peer Group

Vendor Support

The level and depth of vendor support is becoming increasingly critical as BI becomes more integrated into organizations' operations. Better product support often results in higher application success rates and helps to ensure customers get full value from their BI investments. The BI Survey 10 found that companies striving to maximize the business benefits of a BI project should prioritize customer support quality as a key evaluation criterion.

The BI Survey 10 found major differences in the accuracy and timeliness of a vendor's product support as shown in Figure 2. MicroStrategy customers rated their overall product support quality more than double what SAP BO customers did.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 2: Vendor Support for the Select Peer Group

As Figure 3 shows, MicroStrategy’s product support was rated “Excellent” more often than any other vendor in this peer group and has been for six years running. Nearly 90% of MicroStrategy customers rated vendor support as “Excellent” or “Generally acceptable”.

PRODUCT	% OF RESPONDENTS WHO RECEIVED EXCELLENT PRODUCT SUPPORT
MICROSTRATEGY	34.1
MICROSOFT SSRS	18.9
IBM COGNOS BI	15.4
ORACLE OBIEE	11.6
SAP BW BEx SUITE	4.3
SAP BO WEBI	0

Source: The BI Survey 10 KPI Dashboard

Key: Higher numbers indicate a greater % of customers citing excellent product support.

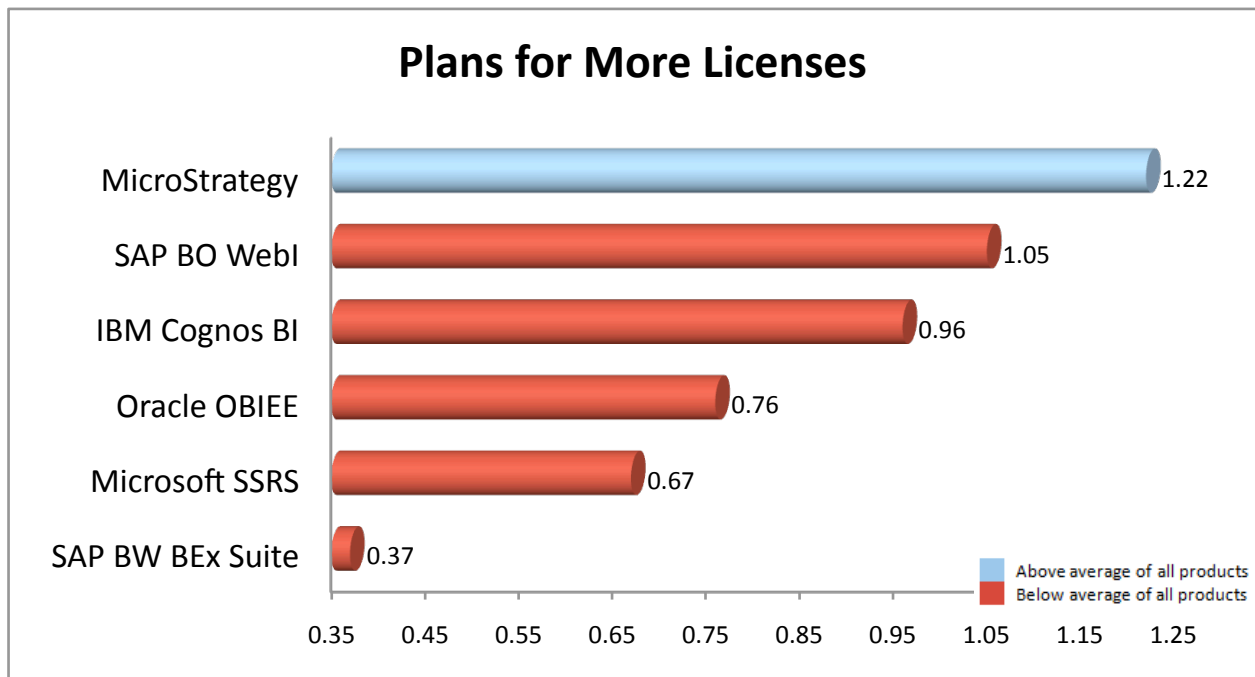
Figure 3: % of Customers Who Received Excellent Product Support for the Select Peer Group

For six years in a row, Business Objects’ customers have been the least satisfied with the quality of support that they received. MicroStrategy speculates that low overall product support quality ratings for Business Objects likely stems from its strategy to acquire rather than to build its products. Given the historic poor support of acquired technologies, it is likely that the SAP BO merger will create continued ongoing support challenges for Business Objects’ customers.

“Once again, MicroStrategy was the top performing BI vendor among their peer group when it comes to quality and timeliness of product support,” said Dr. Carsten Bange , founder and CEO of BARC. “Among this group, MicroStrategy had more top ratings for support and the fewest customers complaining of poor support. This could be related to the stability and consistency of MicroStrategy’s products, which were all developed by one company using a single architecture, rather than being assembled from multiple origins. MicroStrategy remains fully focused on a single product line, unlike the large, general-purpose vendors who provide the least product support.”

Plans for More Licenses

Inclination to purchase more seats is a strong indication of customer satisfaction and project success. As Figure 4 indicates, MicroStrategy customers are nearly 25% more inclined to expand their use of MicroStrategy than the weighted average of all product suites.



Source: The BI Survey 10 KPI Dashboard
 Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 4: Plans to Buy More Licenses for the Select Peer Group

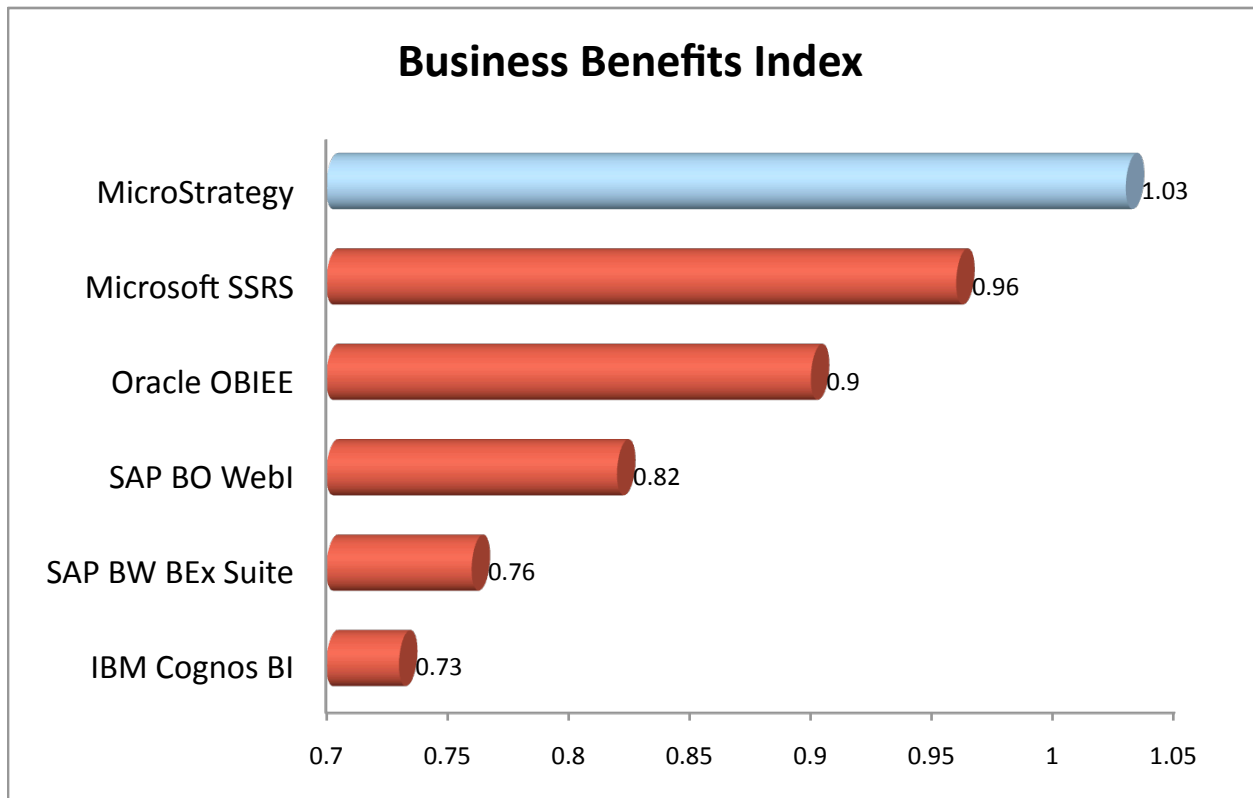
The BI Survey 10 found that nearly 46% of MicroStrategy customers expected to purchase more seats in the future vs. the other vendors. This represents the fifth year in a row that nearly 50% or more of the MicroStrategy customers surveyed have indicated a strong intention to purchase additional seats. In the ten years the survey has been conducted, MicroStrategy has scored significantly above the average of all product suites each year.

“Once again, MicroStrategy had a particularly high proportion of sites expecting to buy more seats,” reported Dr. Carsten Bange, founder and CEO of BARC. “The fact that MicroStrategy had the highest proportion of sites among their peer group expecting to buy more seats, indicates that customers are highly committed to its deployment.”

BUSINESS VALUE

Business Benefit

The BI Survey 10 measured business benefit, or overall project success, by the Business Benefit Index (BBI), which is comprised of eleven discrete revenue-generating and cost-saving benefits. Customers purchasing BI products can use this index as a guide to BI platform selection and deployment decisions in order to maximize the business benefits from their own projects. As Figure 5 illustrates, MicroStrategy customers are nearly 20% more likely to achieve business benefit than the average amongst their peers and higher business benefit as compared with users of IBM Cognos.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 5: Business Benefit Index for the Select Peer Group

The increasingly high business benefit that MicroStrategy customers experience can be attributed to the fact that MicroStrategy customers most often exhibit the following revenue-generating and cost-saving benefits:

More Efficient – MicroStrategy is shown to require less overhead and reduce costs. In the peer group, MicroStrategy had the highest scores in the following BBI components: Saved IT Headcount, Saved Business Headcount, and Saved Other Non-IT Costs.

Faster – MicroStrategy ranked first in the BBI subcomponent Faster Reporting, Analysis, and Planning. It has been shown that slow query performance hampers user adoption and sharply limits the benefits that accrue from implementing a BI tool.

Improves Business Results – Ranking first in the BBI component Increased Revenues and second in Better Business Decisions is testimony to MicroStrategy’s impact on business. Any tool that increases revenue and enables better decision making is a worthwhile investment.

Improves Satisfaction – MicroStrategy ranked a close second in both Improved Employee and Customer Satisfaction. Satisfied users lead to higher adoption rates and overall usage of the BI platform, translating to a higher ROI.

As shown in Figure 6, MicroStrategy ranked #1 in six of the eleven business benefits measured including Saved IT Headcount, Saved Business Headcount and Saved Other Non-IT Costs, Faster Reporting, Analysis, and Planning, and Increased Revenues. MicroStrategy ranked #2 in four of the eleven business benefits including Better Business Decisions and Improved Employee and Customer Satisfaction.

For the tenth consecutive year, customers of SAP Business Objects and Cognos reported far below-average Business Benefit scores, likely stemming from their dis-integrated product lines that result in poor query response times and increased end user training and deployment times. MicroStrategy scored better than SAP BO and Cognos in each of the eleven business benefit criteria.

	MicroStrategy	Microsoft SSRS	Oracle OBIEE	SAP BO Webi	SAP BW BEx Suite	IBM Cognos BI
Saved IT headcount	3.97	3.26	2.60	2.12	0.78	1.03
Saved business headcount	4.34	3.34	3.41	2.14	1.69	2.09
Reduced external IT costs	3.18	4.00	2.51	1.52	0.62	1.86
Saved other non-IT costs	3.83	3.37	3.54	2.53	2.32	2.37
Faster reporting, analysis or planning	7.48	6.74	6.85	7.08	6.45	5.97
More accurate reporting, analysis or planning	7.54	7.17	6.95	6.79	7.11	6.57
Improved customer satisfaction	5.52	5.17	5.56	4.77	4.95	4.18
Better business decisions	5.98	6.54	5.31	4.60	5.02	4.73
Increased revenues	3.63	3.11	2.72	2.20	2.61	2.60
Improved employee satisfaction	4.93	5.24	4.51	4.04	3.48	3.51
Improved data quality	5.34	4.63	5.65	4.96	6.08	4.56
Mean	5.07	4.78	4.51	3.89	3.74	3.59

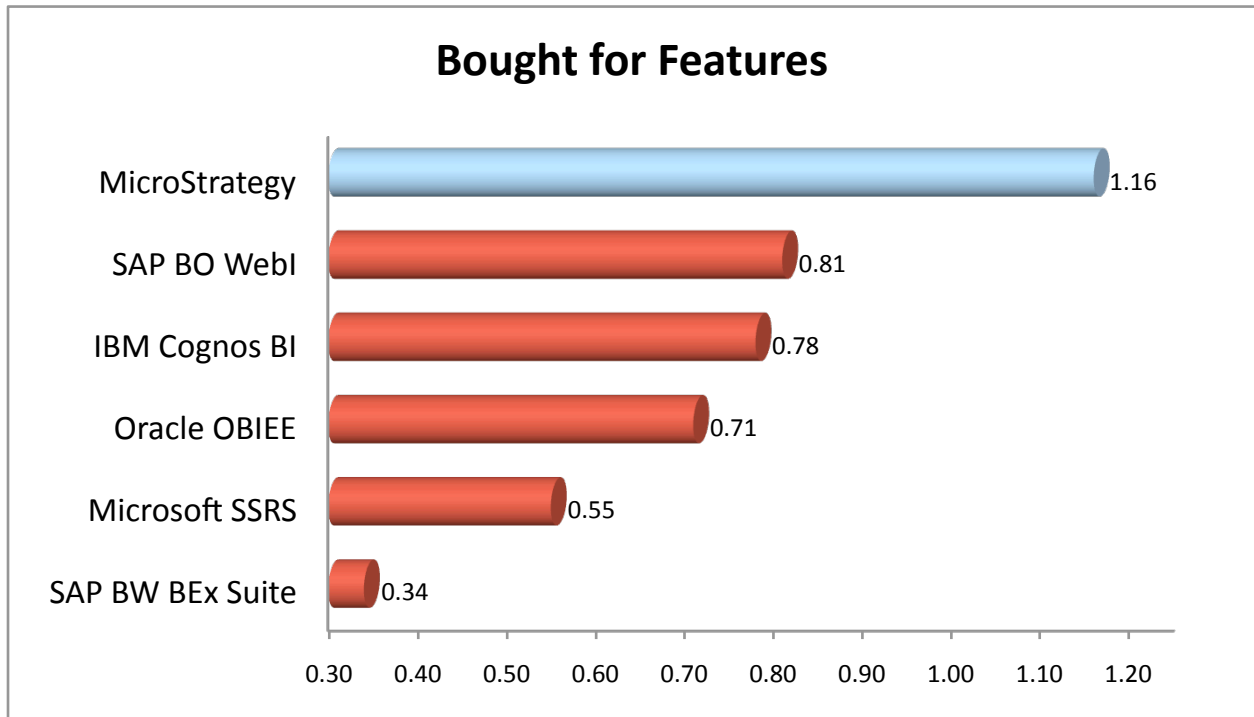
Source: Business Benefits from The BI Survey 10
 Key: Higher numbers indicate greater business benefit / success.

Figure 6: Business Benefit Index for the Select Peer Group

“For the ninth consecutive year, customers have rated MicroStrategy highly in attaining business benefits as measured across a spectrum of important revenue-generating and cost-saving criteria,” said Dr. Carsten Bange, founder and CEO of BARC . He also noted, “The fact that MicroStrategy customers have the largest and most successful BI applications, as measured by the business benefit criteria we evaluated, confirms MicroStrategy’s high functionality and strong suitability for highly scalable and highly performant Web deployments – key drivers in delivering tangible business value.”

Bought for Features

Product Features and Functionality was the number one survey response when customers were asked to list their top three selection criteria for purchasing a BI product, as opposed to price or other criteria. Once the functionality and feature set were comparable then the other criteria came into play. In fact, it was generally the lack of product functionality or features that prevented wider deployment of a BI platform. On this important KPI, MicroStrategy scored 60% higher than its peers, 43% higher than SAP BO, and 49% higher than IBM Cognos.



Source: The BI Survey 10 KPI Dashboard
 Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

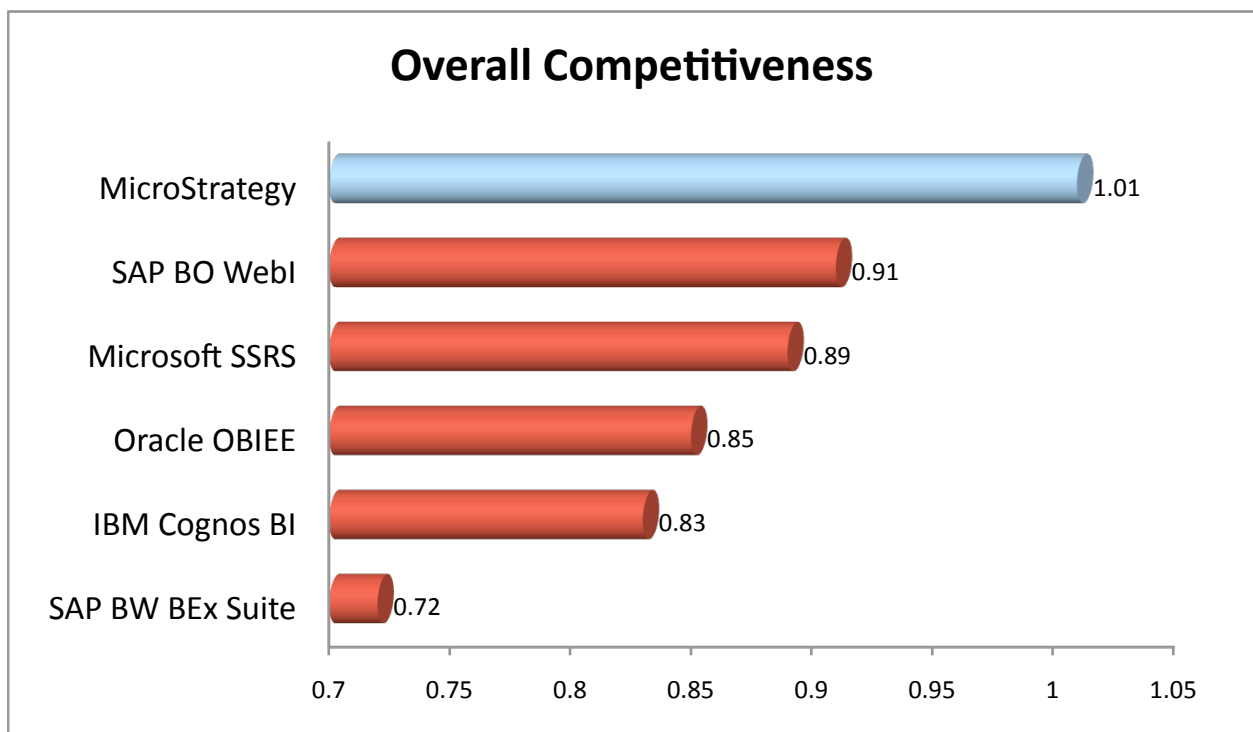
Figure 7: Bought for Features for the Select Peer Group

“MicroStrategy not only has more than the required functionality and features for a BI platform, but they continue to be on the forefront of innovation from year to year, always early to add the newest functionality.” said Dr. Carsten Bange.

Dr. Carsten Bange added, “In my view MicroStrategy’s consistent success on The BI Survey is due to their focus on continuing to broaden and improve its BI platform and the fact that MicroStrategy has resisted the temptation to build a technology portfolio through acquisitions.

Overall Competitiveness

This KPI “Overall Competitiveness” is an aggregate KPI comprised of three root KPIs: Competitive Win Rate, On-Site Competitiveness, and Bought for Features. Competitive Win Rate is how well a company does against other vendors in competitive evaluations. On-Site Competitiveness is how often the product is selected over other BI products in multi-vendor sites. Bought for Features is discussed above. As seen in Figure 8 below, MicroStrategy scored ahead of its peers on this aggregate KPI which is evidence of the strength of the product compared with other enterprise BI platforms.



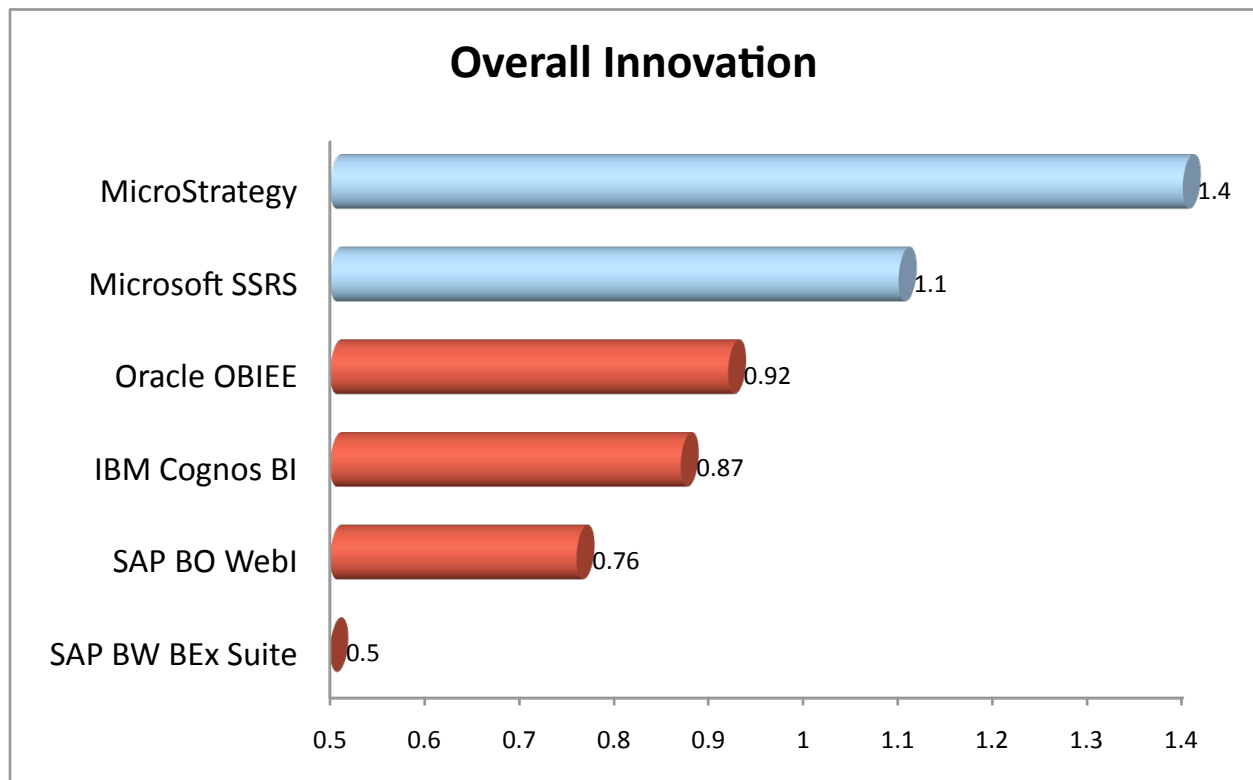
Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 8: Overall Competitiveness for the Select Peer Group

Overall Innovation

Overall Innovation is an aggregate KPI that consists of the following root KPIs: Mobile Use, Predictive Analytics, and Communication Between Users. The BI Survey 10 asks respondents whether they are using or intend to use (in the next 12 months) any of these technologies or functionality as provided by their vendors. As seen in chart Figure 9 below, users consider MicroStrategy far more innovative than its peers. MicroStrategy rated 50% more innovative than the average, 60% more innovative than Cognos, and 84% more innovative than SAP BO. MicroStrategy receives a significantly higher KPI score for Mobile (as evidenced below) and a higher than average score for Predictive Analytics.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 9: Overall Innovation for the Select Peer Group

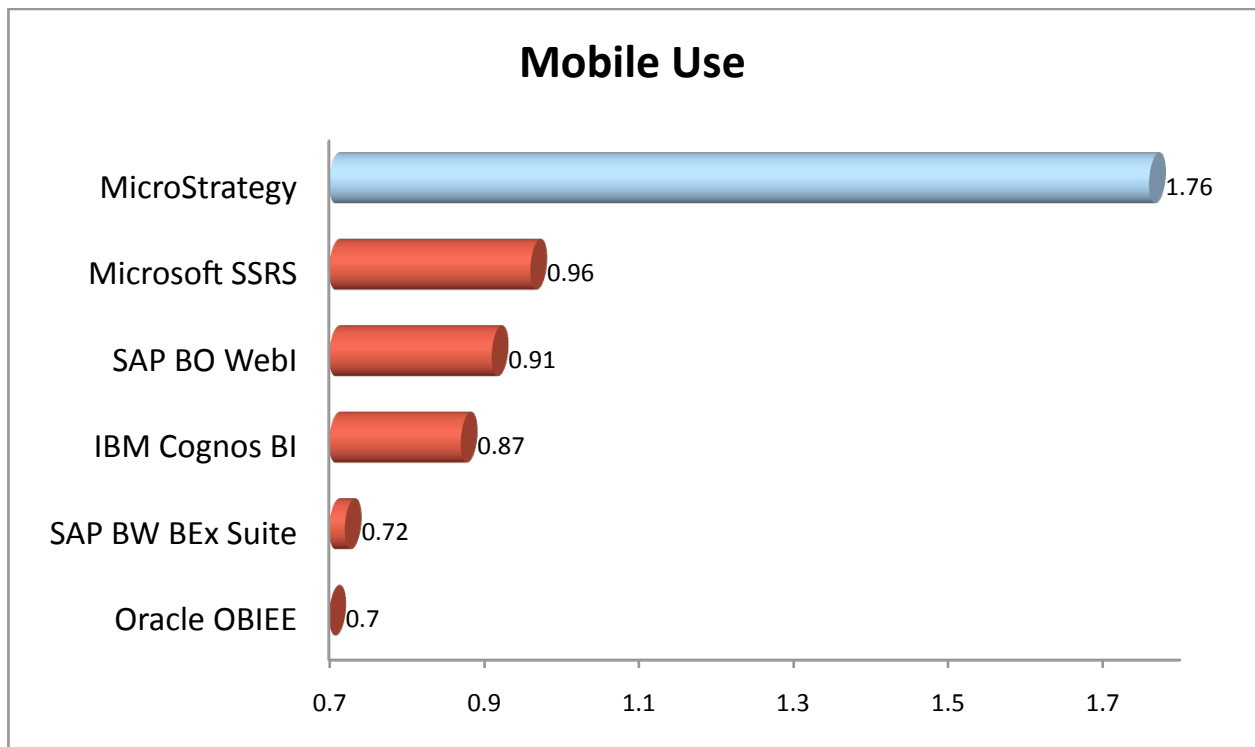
Mobile Use

Although it's included in the aggregate KPI Overall Innovation discussed above, MicroStrategy's performance in the Mobile Use KPI deserves separate mention. As can be seen in Figure 10 below, MicroStrategy scored 78% higher than the average, 91% better than SAP BO, and 102% better than IBM Cognos. Mobile use is one of the more important trends in BI as evidenced by its current and planned use within the next 12 months. In the survey, 30% of respondents either use Mobile BI now or plan to within the next 12 months. BARC acknowledges the strong demand for Mobile technology in the BI market, "Our experience in the field is that mobile BI is strongly demanded by customers, and commonly used in the early stages of a software selection process."³

3 BARC "The BI Survey 10 – The Results" by BARC, January, 2012

MicroStrategy launched into the Mobile market early and aggressively. The company was the first to have a native BI application for the iPad. MicroStrategy also has a native application for the Android OS. Native applications, as opposed to mobile browsers, deliver the full native functionality of the mobile device which creates a much richer user experience. MicroStrategy’s mobile product is a full mobile enterprise application development platform. BI is just the starting point as MicroStrategy also enables transactions and rich multimedia. Integrating transaction capabilities into mobile applications enables the user to close the loop, by immediately acting upon the BI they analyze. For example, a user seeing low inventory levels in the application can immediately click on a button and seamlessly order new inventory, all within the application. Rich multimedia enables the embedding of videos, eBooks, PDF docs (brochures, manuals), games, and other media directly into the BI app for a fully integrated experience, ensuring users never have to leave the application.

“Mobile is a clear example of MicroStrategy’s innovation and tendency to be on the forefront of offering new BI functionality based on leading edge technologies” said Dr. Carsten Bange.



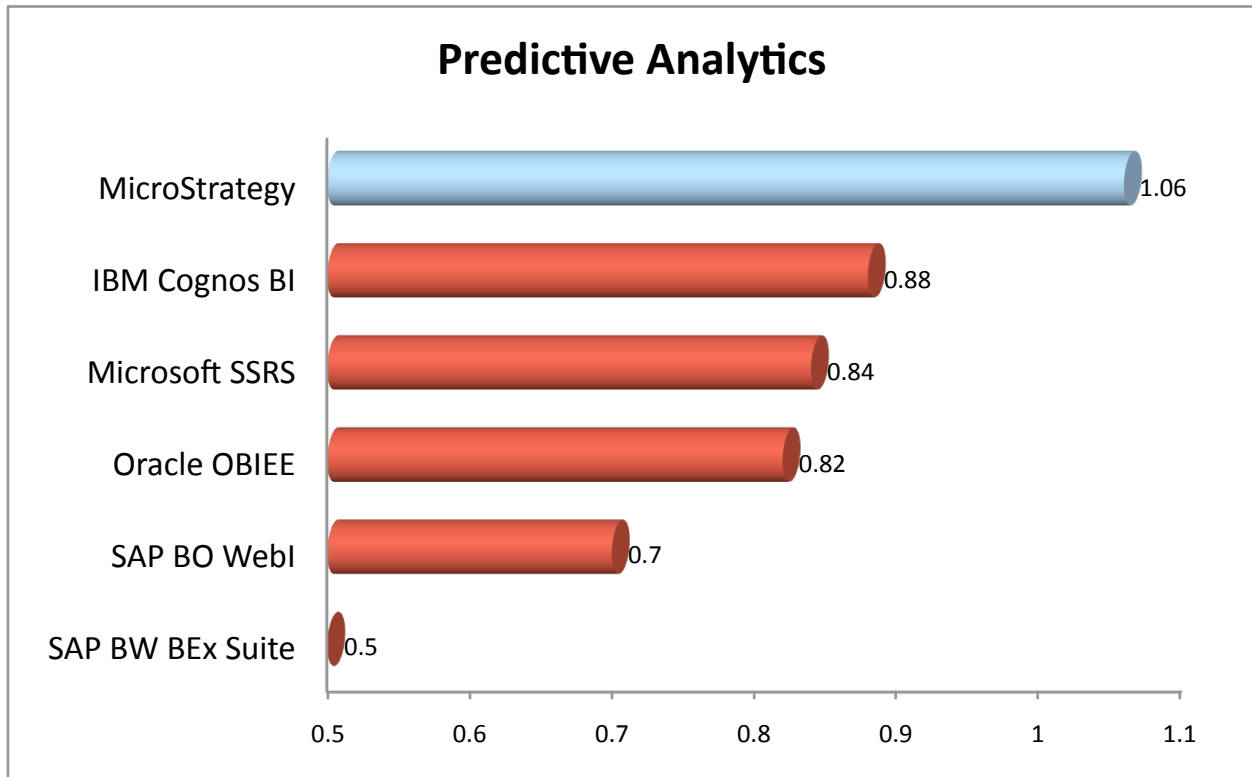
Source: The BI Survey 10 KPI Dashboard
 Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 10: Mobile Use for the Select Peer Group

Predictive Analytics

The BI Survey 10 defines Predictive Analytics as using historical data to attempt to guess what the future will bring⁴. They go on to say that “Predictive analytics is commonly used by companies who have large data volumes resulting from large numbers of transactions”. As the amount of data continues to grow and competition becomes more intense, information will become more of a weapon. That means using all information in the company to the optimal extent, which includes finding patterns in some of the lowest levels information such as transaction detail and web site click paths. Predictive analytics finds these patterns and uses them to predict future trends. The technology necessitates large amounts of detailed data so ROLAP technology, like MicroStrategy’s, tends to be much more effective than cube technology, where the data is summarized at higher levels.

And according to the survey, current and future planned use (next 12 months) of predictive analytics is high at 56% (20% currently, 36% planned). On this important trend, MicroStrategy lead with the highest score amongst its peers as can be seen in Figure 11 below. Even more impressive is that MicroStrategy scored higher than IBM Cognos, which now owns SPSS (data analytics vendor) and has integrated components of it into Cognos.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

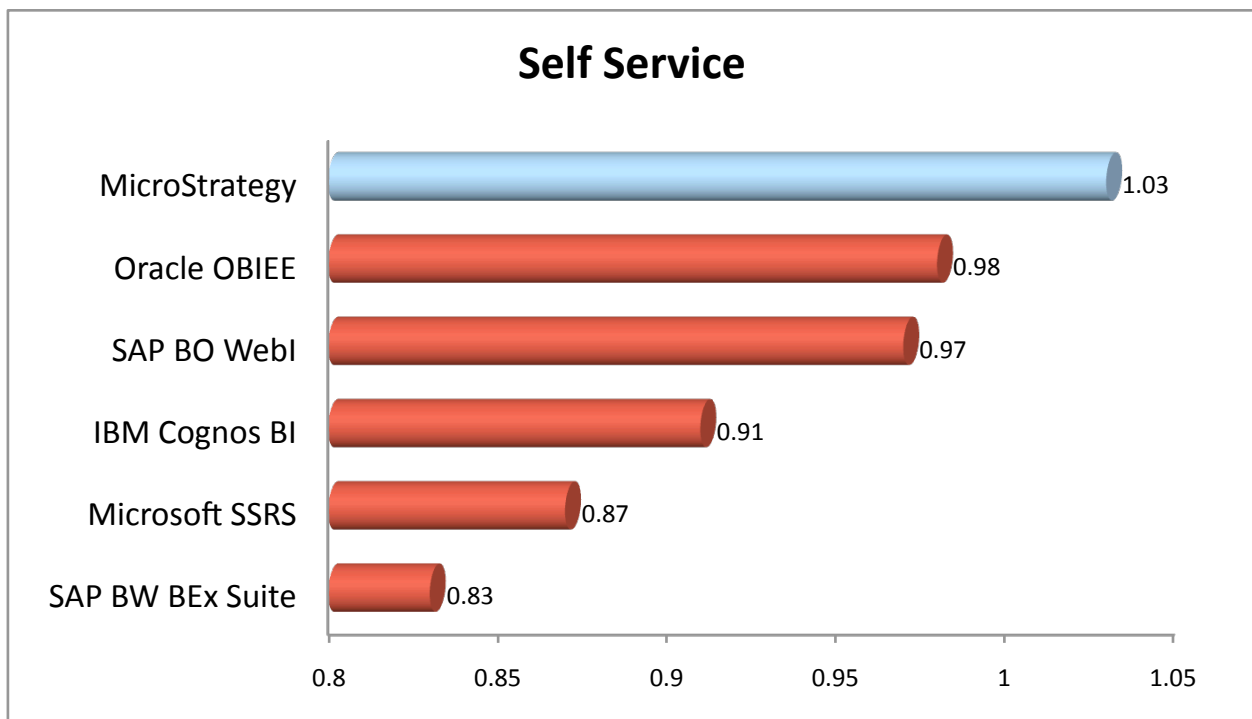
Figure 11: Predictive Analytics for the Select Peer Group

4 BARC “The BI Survey 10 – The Results” by BARC, January, 2012

Self Service

The BI Survey 10 describes Self Service as “speeding up processes and eliminating the middle man. Independence from IT processes is a commonly cited need in BI projects.” Self Service makes the end user happier as they get the information they desire and perform analysis first hand without IT intervention. It makes the process much quicker and provides them with new and additional insights as they themselves directly explore the data. With the need for less frequent IT intervention, IT costs decline. Self-service BI delivers multiple benefits as it makes the business user happier, enables them to act on the data more quickly, and saves them money.

The MicroStrategy platform has a number of important features that lend itself to high levels of self-service: (1) powerful prompting capabilities and (2) the Visual Insight module. Rich and powerful prompting capabilities mean that a single master report can be created and then accessed by larger numbers of people, who each get the particular report they desire through a prompt or series of prompts which deliver a guided workflow. Visual Insight is made for business users to utilize without IT intervention. It does not require any training and users can come to powerful insights in minutes. No peer of MicroStrategy has such capabilities. These factors earned MicroStrategy the highest score for Self Service in their peer group as can be observed below in Figure 12.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 12: Self Service KPI for the Select Peer Group

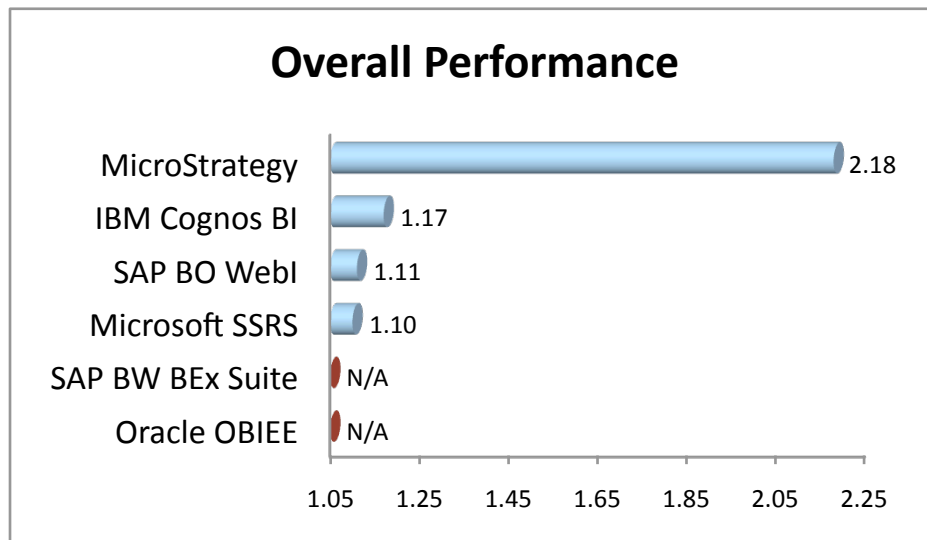
PRODUCT PERFORMANCE

Overall Performance

According to BARC, overall performance is critical to the success of a BI deployment. BARC states, “Fast performance is more important than most people realize. You can work around missing features and even bugs, but nothing can disguise an application that is painfully slow.” They then go on to call Performance the most important technical KPI.⁵

The BI Survey 10 created an “Overall Performance” KPI from three root KPIs: “Query Performance”, “Performance Satisfaction”, and “Real-Time Analysis”. The Query Performance KPI analyzes typical query response times and normalizes it by the single biggest variable impacting performance; the widely varying differences in the amount of data organizations analyze. The Performance Satisfaction KPI scores the number of query performance complaints. These two KPIs will be discussed in more detail. The Real Time Analysis KPI assesses how long it takes for data coming from feeder systems to be available in BI queries and, as such, is a proxy for data latency.

As shown in Figure 13, MicroStrategy scored nearly 60% better than the average, 86% than IBM Cognos, and 96% better than SAP BO (Figure 13).



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

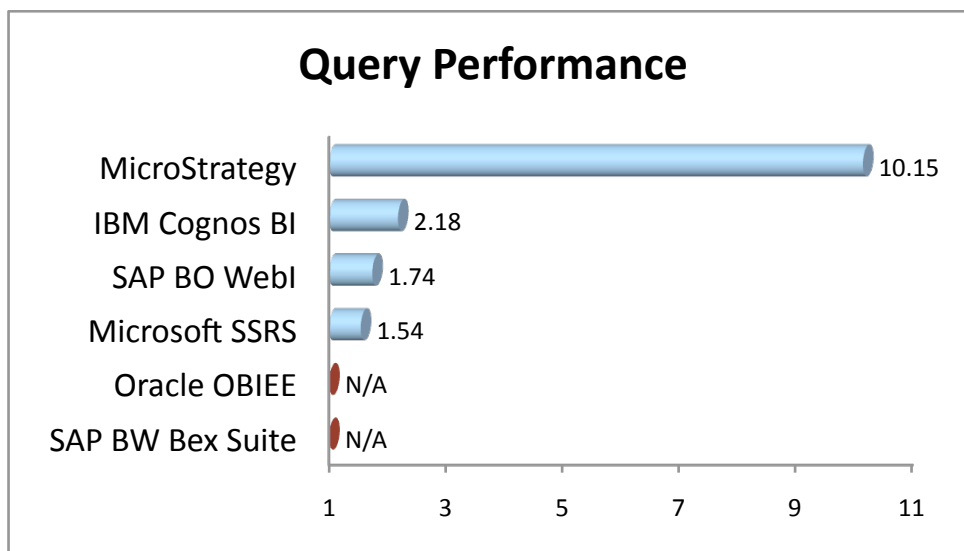
Figure 13: Overall Performance KPI for the Select Peer Group

⁵ BARC “The BI Survey 10 Best Practices” by Melanie Mack and Bernie Finucane, January, 2012

Query Performance

As in the last six years, poor query performance has been the most frequently cited BI problem and the largest deterrent to wider deployments. In this year’s survey, it was cited as “the most common problem of all”. According to BARC, query performance is the “most important single product-related criterion for choosing a product” and cites that companies that used this as a selection criterion were more successful in business terms than those that didn’t. Yet survey data shows that most organizations do not thoroughly evaluate performance during the product selection stage by benchmarking against real-world customer experiences.^{6 7}

As Figure 14 shows, when Query Performance is adjusted for data volumes, MicroStrategy has the highest performance of any product suite at over 10 times the weighted average of all products in the survey. MicroStrategy performed 365% better than IBM Cognos and 480% better than SAP BO.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score.

Figure 14: Query Performance Adjusted For Data Volumes for the Select Peer Group

“It is particularly impressive that MicroStrategy’s query performance as measured by a number of KPIs, but particularly when accounting for data volumes, has scored extremely well each year The BI Survey has been conducted,” said Dr. Carsten Bange. “Their continued focus on performance throughout their platform, such as on their In-Memory ROLAP, seems to be successful.”

MicroStrategy’s In-memory ROLAP technology uses the multi-gigabytes of memory space available in 64-bit servers as “multi-dimensional memory” in which both data and calculations can reside as multi-dimensional datasets called ROLAP cubes. MicroStrategy reports and dashboards automatically direct their queries to In-memory ROLAP cubes whenever possible to take advantage of the much faster query performance available

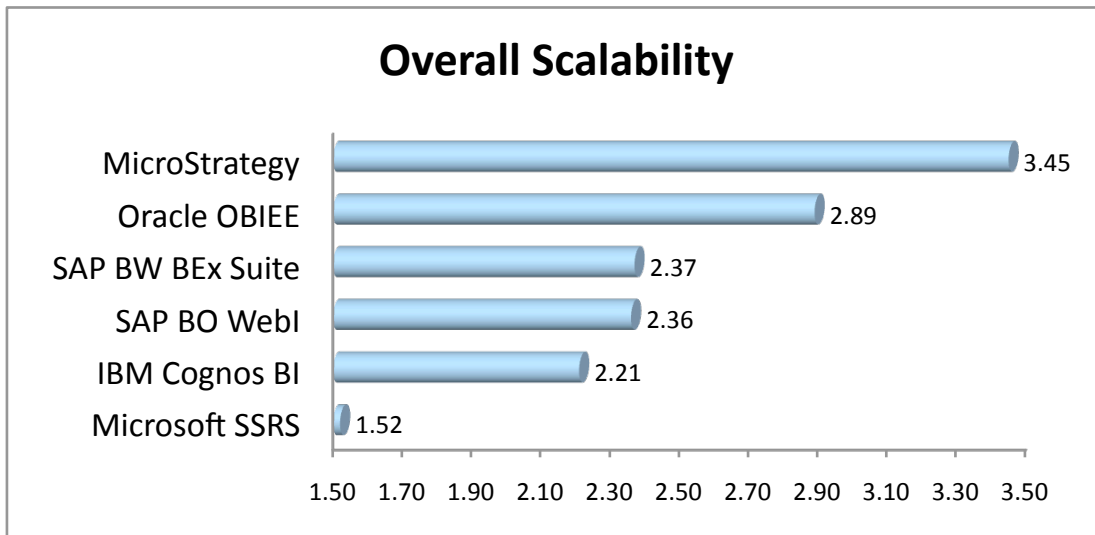
⁶ BARC “The BI Survey 10 – The Results” by BARC, January, 2012

⁷ BARC “The BI Survey 10 – Best Practice” by BARC, January, 2012

with in-memory data as compared to database-resident storage. If the analysis cannot be satisfied from an in-memory ROLAP cube, MicroStrategy’s Analytical Engine automatically and dynamically directs queries to the underlying data source using highly optimized SQL.

Overall Scalability

The aggregate Overall Scalability KPI score is comprised of 3 root KPIs: “Proportion of Employees”, “Data Volume”, and “Number of Departments”. Proportion of Employees measures the proportion of employees using the product to total number of employees. Data Volume is the median volume of data on individual projects. Number of Departments measures the average number of departments within companies using the platform. As Figure 15 shows, MicroStrategy received the highest overall Scalability score, at 40% higher than the average, 46% higher than SAP BO, and 56% higher than IBM Cognos. These scores clearly demonstrate MicroStrategy’s leadership in enterprise scalability.



Source: The BI Survey 10 KPI Dashboard

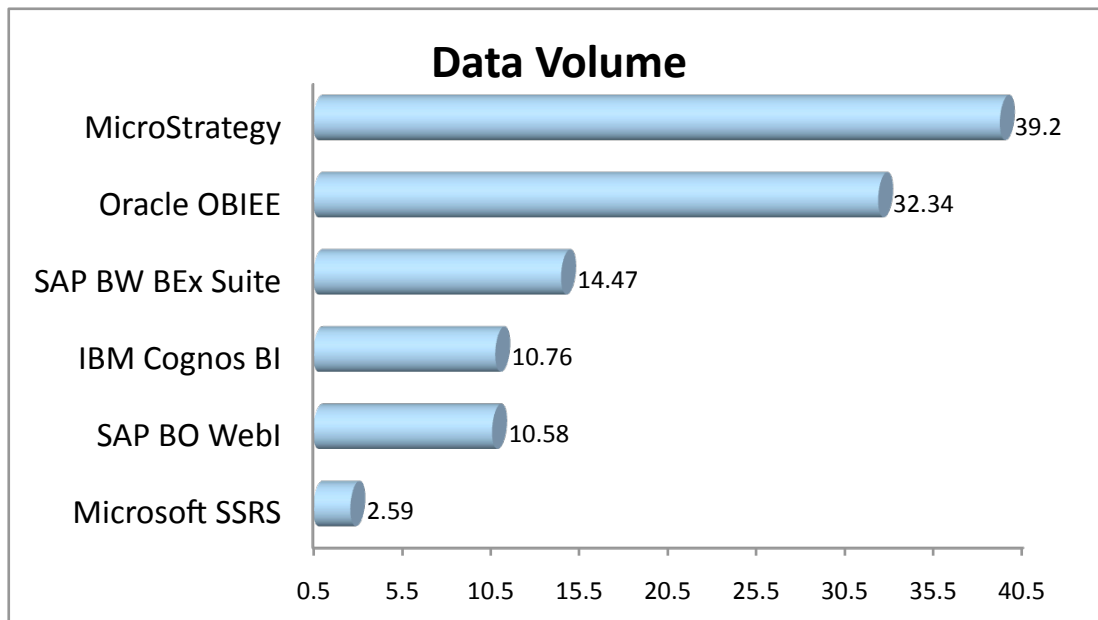
Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score

Figure 15: Overall Scalability KPI for the Select Peer Group

Data volumes

Increasing information intensity and, in particular, the desire to electronically capture and store every business transaction, has made the multi terabyte-size data warehouse more common. While analysis of summary data is often a launching point for understanding business trends, organizations need to view transaction-level detail to discover anomalies, exceptions, and trends that pre-defined aggregations can obscure. The BI Survey 9 had found that almost 10% of organizations indicated that their BI Product could not handle the data volumes.

For the tenth consecutive year, MicroStrategy customers indicated that they, by far, analyzed the largest volumes of data – a median of 556 GB in this latest Survey compared to a median of 9.5 GB overall. At the high end 42 % of MicroStrategy customers analyze over 1 Terabyte versus an average of 11% for all other customers. As Figure 18 shows, MicroStrategy customers analyze median data volumes that are 20% larger than Oracle BIEE customers, 260% larger than IBM Cognos customers, and 1400% larger than Microsoft customers.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score

Figure 16: Data Volume KPI for the Select Peer Group

“For the tenth consecutive year, MicroStrategy sites have reported the largest data volumes of all, with a substantial gap between MicroStrategy and the second-place product,” said Dr. Carsten Bange He added “Many of MicroStrategy’s customers are implementing transaction-level BI databases resulting in extremely large data warehouses. MicroStrategy continues to be the clear leader in handling large data volumes in the enterprise-scale BI segment.”

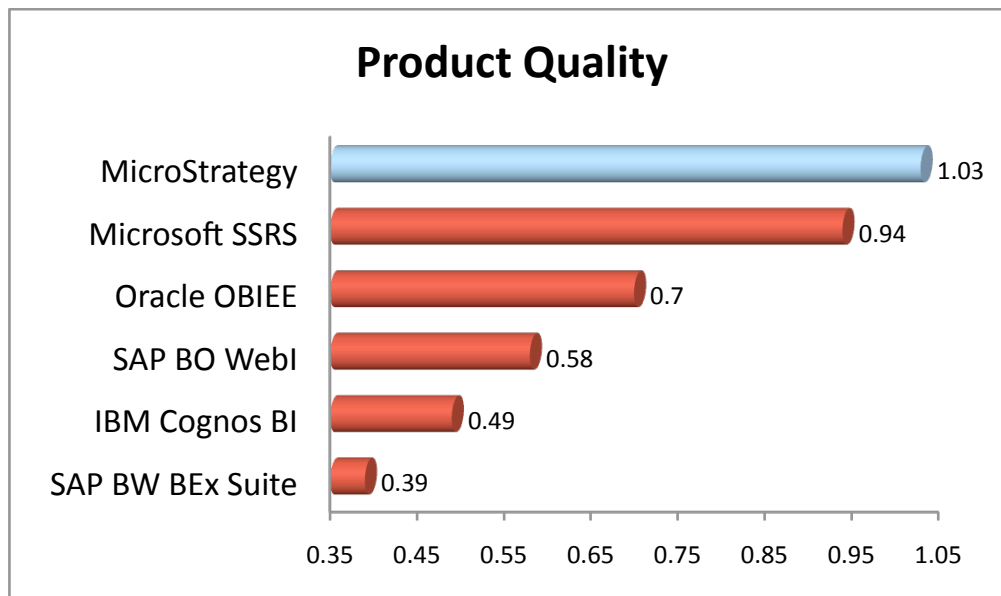
Cube-based OLAP products, such as those employed by some of the Microsoft and Cognos products, inherently limit the data that can be analyzed. These products are optimized for analysis of summary-level or small volumes

of data, but are not suitable for the more valuable, transaction-level BI applications. In contrast, MicroStrategy's proprietary Relational OLAP (ROLAP) technology allows interactive analysis of multiple terabyte-sized data warehouses, including hundreds of TB.

Product Quality

The Product Quality KPI measures product problems. As this is a negative measure, the KPI is lower with a larger number of problems and increases as the number of problems decreases. MicroStrategy's lead in product quality is clear from Figure 17. MicroStrategy's Product Quality score is roughly double to the Product Quality scores of both SAP BO and IBM Cognos. These vendors accrue double the number of product related complaints compared to MicroStrategy.

The MicroStrategy platform has been organically designed and built from the ground up with no part of it having been acquired externally. It's one of the most unified and organic BI platforms in the market. The result is a higher level of quality. In contrast, mega-vendor BI platforms like Oracle OBIEE, IBM Cognos, and SAP BO have been cobbled together from numerous acquisitions. Users see substantial differences in quality between products organically designed and developed by a single company and products that are the result of numerous acquisitions, some of which cause redundancy and others that just add complexity.



Source: The BI Survey 10 KPI Dashboard

Key: Normalized score relative to the weighted average of 1.0 for all products; higher numbers indicate greater overall score

Figure 17: Product Quality KPI for the Select Peer Group

CONCLUSION

The BI Survey 10, the leading independent survey of real-world BI implementations, provides unique, statistically significant insight into actual BI implementations and customer experiences with various BI products. The results of the Survey provide an important guide to the product capabilities and support that users can expect from the various vendors. Survey respondents are both critical and candid in their assessments. Since the choice of a BI product has a significant impact on overall BI project success, it is recommended that meaningful product evaluations, starting with a close review of the product benchmarks in The BI Survey 10, should be conducted when embarking on new BI projects.

Notable in The BI Survey 10 results are the widely varying customer experiences and product results among the BI products. Some of the many categories in which clear vendor trends have emerged over the past ten years include:

- Business Benefit
- Features (Bought for Features)
- Overall Competitiveness
- Mobile Use
- Overall Innovations
- Predictive Analytics
- Self Service
- Plans for More Licenses
- Vendor Support
- Suitability
- Overall Quality & Support
- Overall Performance
- Performance Satisfaction
- Product Quality
- Query Performance
- Data Volume
- Overall Scalability

In the above categories, for the select peer group, MicroStrategy has consistently been a leader, sometimes by a wide margin, in the ten years The BI Survey has been conducted. Furthermore, in categories such as Query Performance, Mobile Use, and Features (Bought for Features), the gap between MicroStrategy's leadership position and the positions of the other vendors continues to grow at an increasing rate.

“MicroStrategy's consistently strong performance in The BI Survey is indicative of their focus on continuing to broaden and improve its BI platform and the fact that MicroStrategy has resisted the temptation to build a technology portfolio through acquisitions. Vendors with less focus on their core BI offering who have branched out to ancillary BI areas, such as ETL, data quality, and financial applications, are increasingly finding that their customer base is deterred from broader deployments because of the complexity of the resulting portfolio.”

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This product is patented. One or more of the following patents may apply to the product sold herein: U.S. Patent Nos. 6,154,766, 6,173,310, 6,260,050, 6,263,051, 6,269,393, 6,279,033, 6,567,796, 6,587,547, 6,606,596, 6,658,093, 6,658,432, 6,662,195, 6,671,715, 6,691,100, 6,694,316, 6,697,808, 6,704,723, 6,741,980, 6,765,997, 6,768,788, 6,772,137, 6,788,768, 6,798,867, 6,801,910, 6,820,073, 6,829,334, 6,836,537, 6,850,603, 6,859,798, 6,873,693, 6,885,734, 6,940,953, 6,964,012, 6,977,992, 6,996,568, 6,996,569, 7,003,512, 7,010,518, 7,016,480, 7,020,251, 7,039,165, 7,082,422, 7,113,993, 7,127,403, 7,174,349, 7,181,417, 7,194,457, 7,197,461, 7,228,303, 7,260,577, 7,266,181, 7,272,212, 7,302,639, 7,324,942, 7,330,847, 7,340,040, 7,356,758, 7,356,840, 7,415,438, 7,428,302, 7,430,562, 7,440,898, 7,486,780, 7,509,671, 7,516,181, 7,559,048, 7,574,376, 7,617,201, 7,725,811, 7,801,967, 7,836,178, 7,861,161, 7,861,253, 7,881,443, 7,925,616, 7,945,584, 7,970,782 and 8,005,870. Other patent applications are pending.

