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Analytics for Business, Consumers and Social Insights

Bhavish SOOD

Gartner

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Business Analytics: 2020 Market Trends

Singapore Management University

22nd July 2015

Bhavish Sood

Bhavish.Sood@Gartner.com

Top Technology Spending Priorities – The Nexus Has Taken Up Residence

Top Technology Priorities 2015

ROW

BI/ANALYTICS

INFRASTRUCTURE & DATACENTER

ERP

CLOUD

MOBILE

DIGITALIZATION/DIGITAL MKTG

SECURITY

NETWORKING, VOICE AND DATA COMMS

CRM

INDUSTRY SPECIFIC APPLICATIONS

LEGACY MODERNIZATION

ENTERPRISE APPS

Top Technology Priorities 2015

Asia Pacific

BI/ANALYTICS

CLOUD

MOBILE

INFRASTRUCTURE & DATACENTER

ERP

DIGITALIZATION/DIGITAL MKTG

SECURITY

NETWORKING, VOICE AND DATA COMMS

CRM

LEGACY MODERNIZATION

IT SERVICES/ AUTOMATION

INDUSTRY SPECIFIC APPLICATIONS



CIO Survey Feedback



Passive analysis
of data



Active experimentation
informed by data

80%



Backward-looking
Reporting



Forward-looking
predictive analytics

79%



Structured
information



New types of information,
including social and multimedia

65%



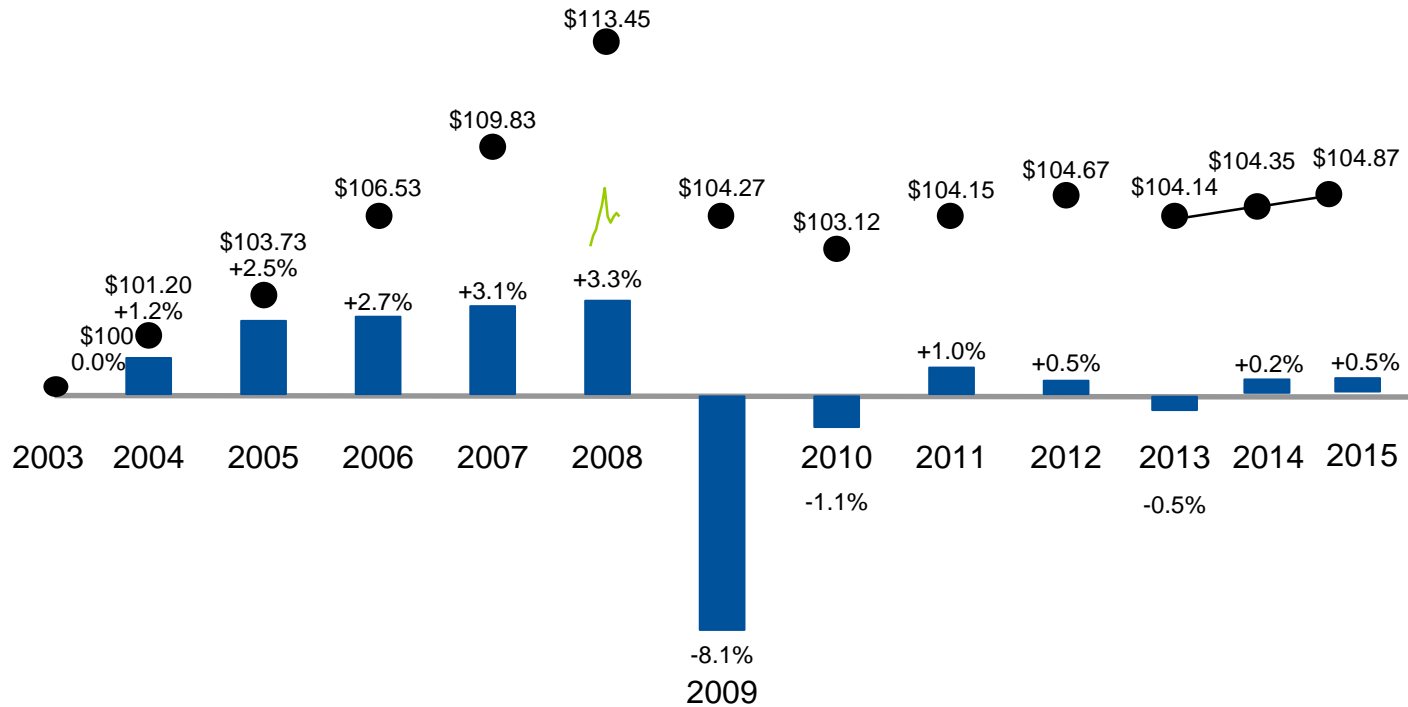
Separate analytics



Embedded analytics

63%

IT Is a Cornerstone, but Budgets Are Capped



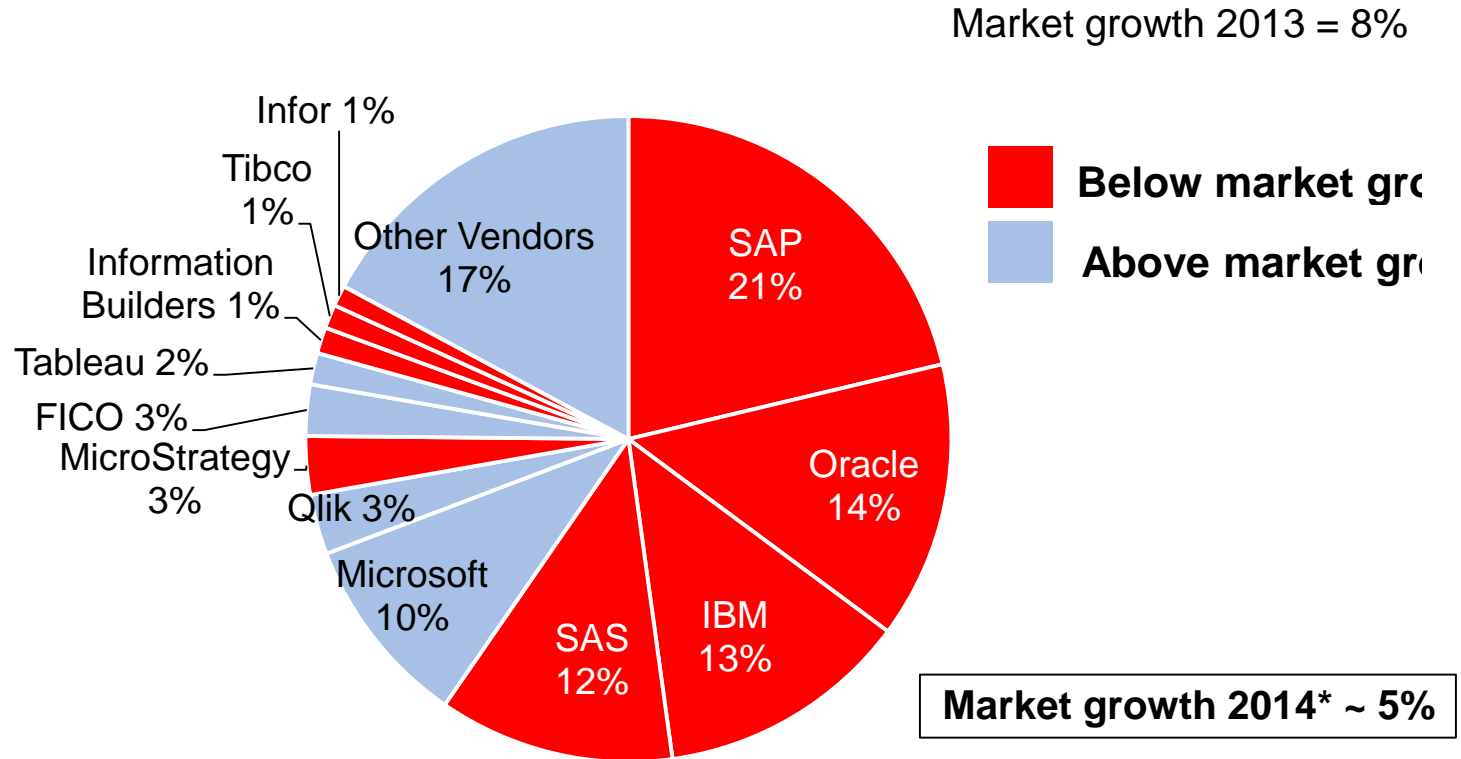
n ≥ 2,000; CIO Survey

The Continuation of M&A in BI Market

- Oracle Buys Endeca
 - Unstructured and structured content
- IBM Buys Algorithmics
 - Financial risk analytics
- IBM Buys DemandTec
 - Merchandising analytics
- IBM Buys Emptoris
 - Spend analytics
- HP Buys Vertica
- Data warehousing DBMS
- HP Buys Autonomy
 - e-discovery and content archiving
- Deloitte Buys Oco
 - Port packaged industry content
- Actuate Buys Xenos
 - CCM and BI integration
- Pitney Bowes Buys Portrait Software
 - Customer interaction analytics

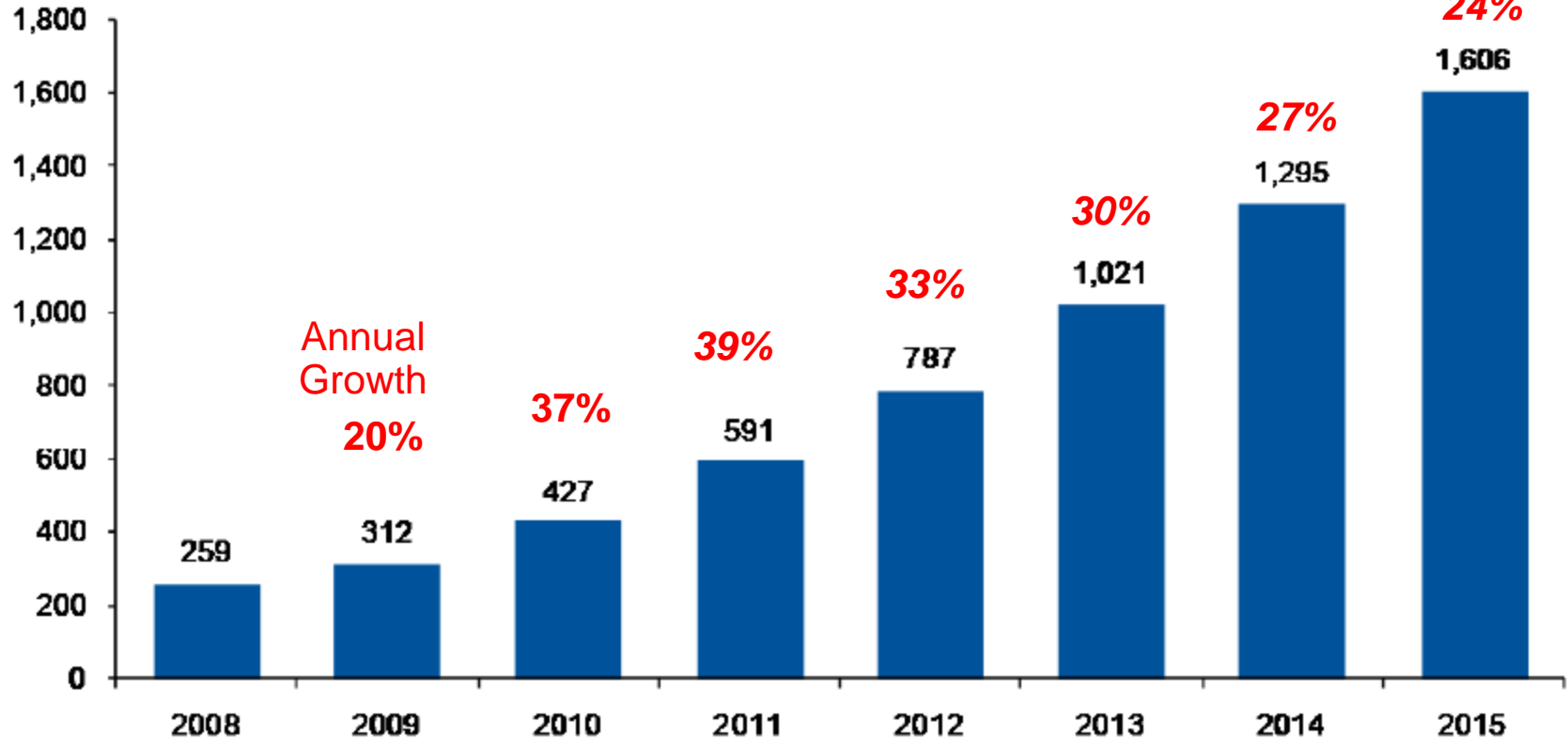


Market Share Does Not Tell an Accurate Picture of Demand



Data Discovery Segment Expected to Grow at 3X BI Market Through 2015

Millions of U.S. Dollars

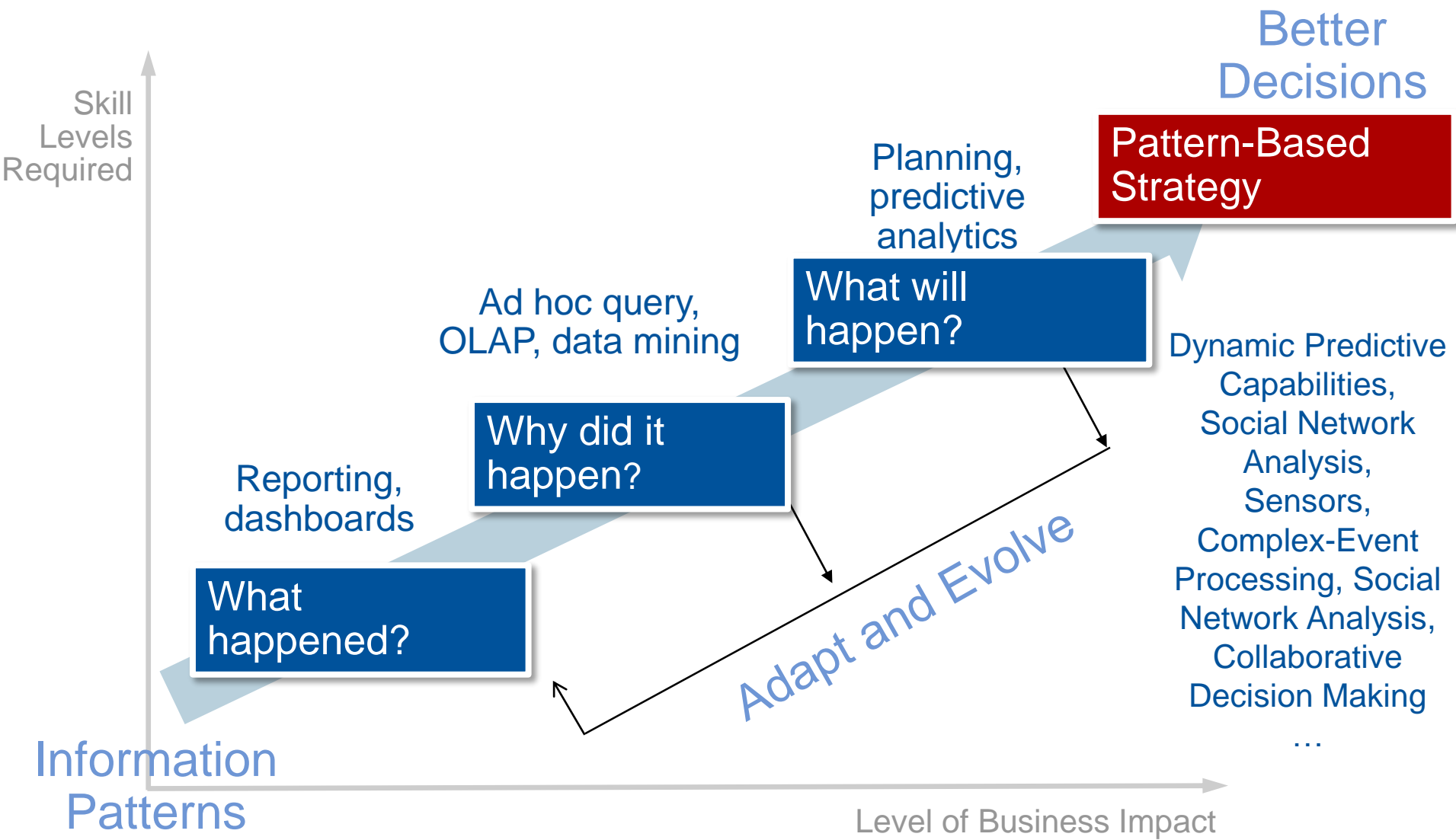


Source: Gartner (June 2011)

In a Commoditized Space — Acquisitions Focus on Open Source



Shift From Measurement to Analysis, Forecasting and Optimization



Freemium the Next Battleground

Business Unit Stack

Packaged Analytics
Data Discovery
Embedded Analytics

Integration Layer

Data-Mash Ups, Self-Service ETL
MapReduce
Self-Service Data Preparation

Storage

In-Memory
Hadoop/Spark/Data Lake
Cloud Storage

Opex vs. capex
Subscription-pricing
"Land-and-expand"

Personal Stack

Qlik Sense Desktop
Excel Power BI
MicroStrategy Analytics Desktop
IBM Watson Analytics
SAP Lumira

R/Python/MapReduce
Talend/Pentaho
Microsoft PowerQuery

Google BigQuery
AWS/Redshift

"Freemium" or Low Cost

"Suits" Versus "T-Shirts"



Traditional DW & BI

VS.



Big Data & Analytics

Performance Management
Requirements-based
Top-down design
Integration and reuse
Better decisions
Enterprise

Data Discovery
Opportunity-oriented
Bottom-up experimentation
Immediate use
Business innovation
Functional

Who Will Provide the Spreadsheet for the 21st Century?



Top Technology/Platform Inquiry Subject Drivers

- Future of BI/trends, BI Market
- Data discovery, Search and the world of BI, Mashups
- Mobile BI
- Real time BI
- Data Mining and predictive analytics
- Cloud Computing

Top People/Process Inquiry Drivers

- BI Roadmap and strategy review, staffing, sponsorship
- Tool consolidation
- Best practices for BI/BICC, Organizational models for BI
- BI and Information Governance
- Analytics architecture
- Performance Metrics
- Build versus buy applications

Mobile BI Applications Extend Consumer Experience



Functionality Evaluation Criteria (Example)	
Reporting	Yes
Dashboards	Yes
Information Navigation	Yes
Information Subscription	No
Offline Mode Exploration	No
Collaboration	Yes
Alerts	Yes
Mapping	Yes
Context Awareness	No
Write-back	Yes

Vendor Background	Example Vendors	Products
Information Aggregators	Transpara, Enterprise Art, Mellmo, Exxova	Visual KPI, Surf BI, Roam BI
BI Platform Vendor	IBM, SAP, MicroStrategy	IBM Cognos Go Mobile, SAP Business Objects Mobile, MicroStrategy Mobile

Gold Rush: Independents Increase Focus on Asian Markets

Vendor*	Asia GTM
Actuate	Strong push through BIRT Developer conferences.
arcplan	Strong presence in China and South Korea. Started new office in India.
Board MIT	Good Australia presence. Focus on selling PM to SMB customers.
MicroStrategy	China and Australia growing fastest. Increasing focus on Singapore and India.
QlikView	Selling to business paying off with strong growth in Singapore, India and Australia.
SAS	Focused on solving business problems through product framework that combines data management, analytics and model development capability and industry IP
Tibco Spotfire	Selling into its installed base of middleware and BPM customers. Embedding Spotfire in loyalty and BPM solutions.



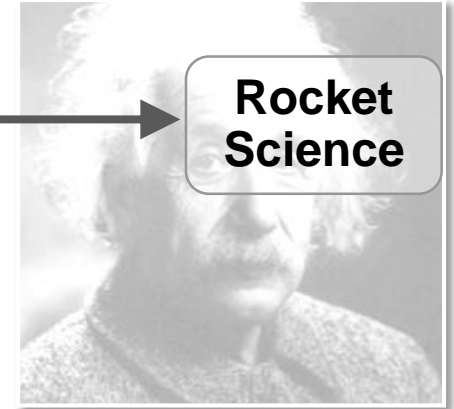
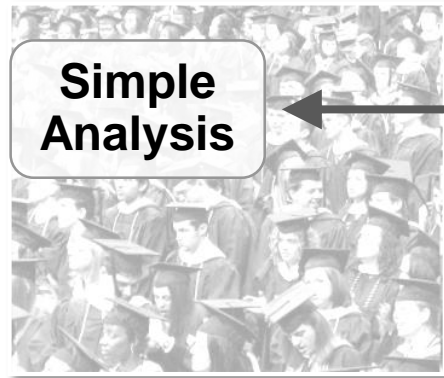
*In alphabetical order

Innovation is happening right here in Asia

Vendor/HQ Location	Solution Focus
Zycus/Mumbai, India	Spend Analytics
Subex/Bangalore, India	Telecom Analytics
Manthan/Bangalore, India	Retail Analytics
TechnologyOne/Brisbane, Australia	BI Platform and CPM
BIRetail/Bangalore, India	Retail Analytics
Ramco/Chennai, India	Banking Analytics
Yellowfin/Melbourne, Australia	BI Platform
iCreate/Bangalore, India	Banking BI and Analytics
eMite/Sydney, Australia	Service Intelligence (ITSM)
CAMMS/Adelaide, Australia	CPM
CSS/Chennai, India	Product Support Analytics



India and China Emerge Leaders in Outsourced Data-Mining Capabilities



Consider a Partner When:

Unstable Demand

Rapid Growth

Resource Constrained

Clear Problem

Example Vendors

KIE Square

Fractal Analytics

Brainmatics

Salorix

Genpact

Infosys

Mu Sigma

WNS

Consider a Partner When:

Infrequent Demand

Scarce Expertise

Unique Application

Unusual Data

Conclusions/Summary

- BI has surpassed the \$10 billion milestone and will continue to grow because it is a crucial component of gaining the information advantage.
- IT continues to prioritize BI and will need to do more with flat budgets/diminished buying mandates. Focus continues to be on rationalization. Business units big buyers now.
- Data discovery and packaged analytics momentum in business accentuates the need for a portfolio approach for users.
- BI has a role to play in all four major forces that will impact IT in the next 20 years.