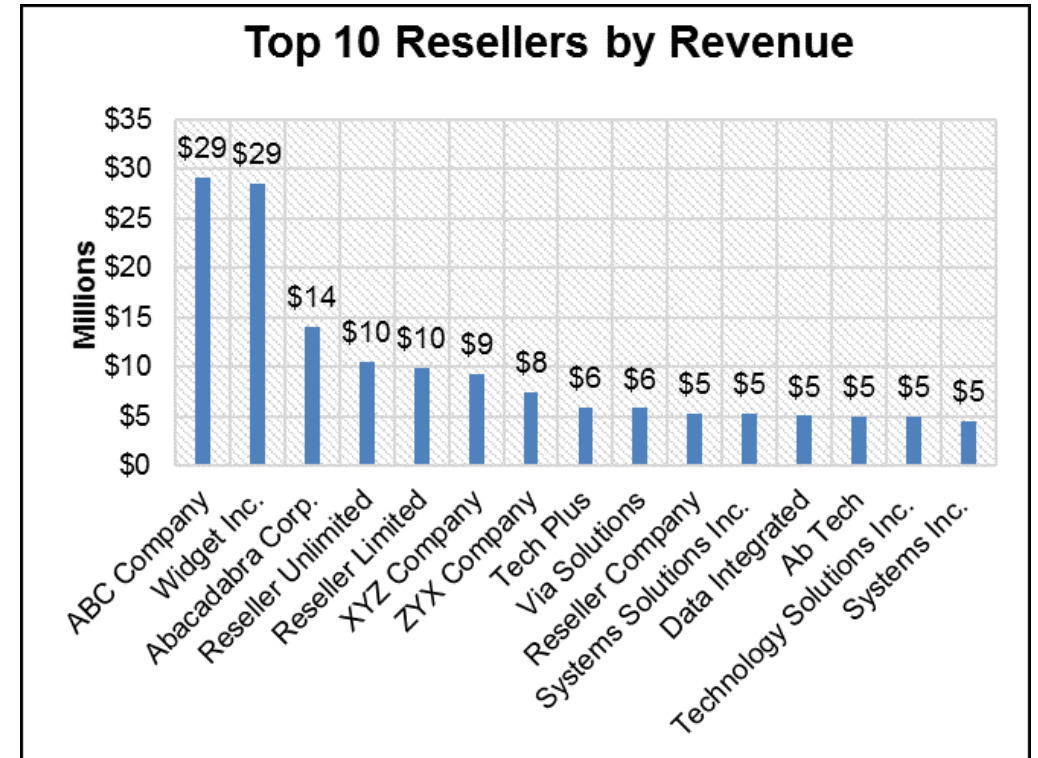


Data & Analytics: U.S. Market Trends, Challenges and Opportunities

Stephanie Meloni, Market Intelligence Consultant
9/14/2017

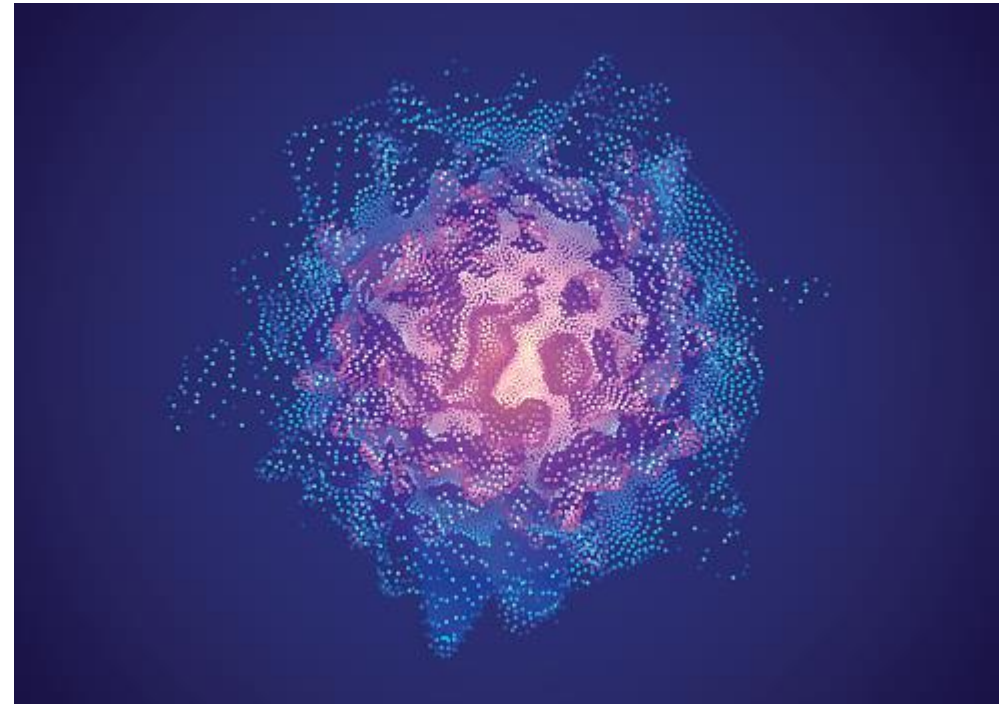
Market Intelligence Offerings

- > Streamlined Sales Pipeline Development (SSPD)
 - > Market trends, competitive intelligence, net new end user and partner targeting
- > Missed opportunity / share of wallet
- > Market basket analysis
- > Peer comparison
- > Whitespace call lists



Agenda

- > State of the market
- > Buyer and technology trends
- > Challenges
- > Data lifecycle
- > Conclusion



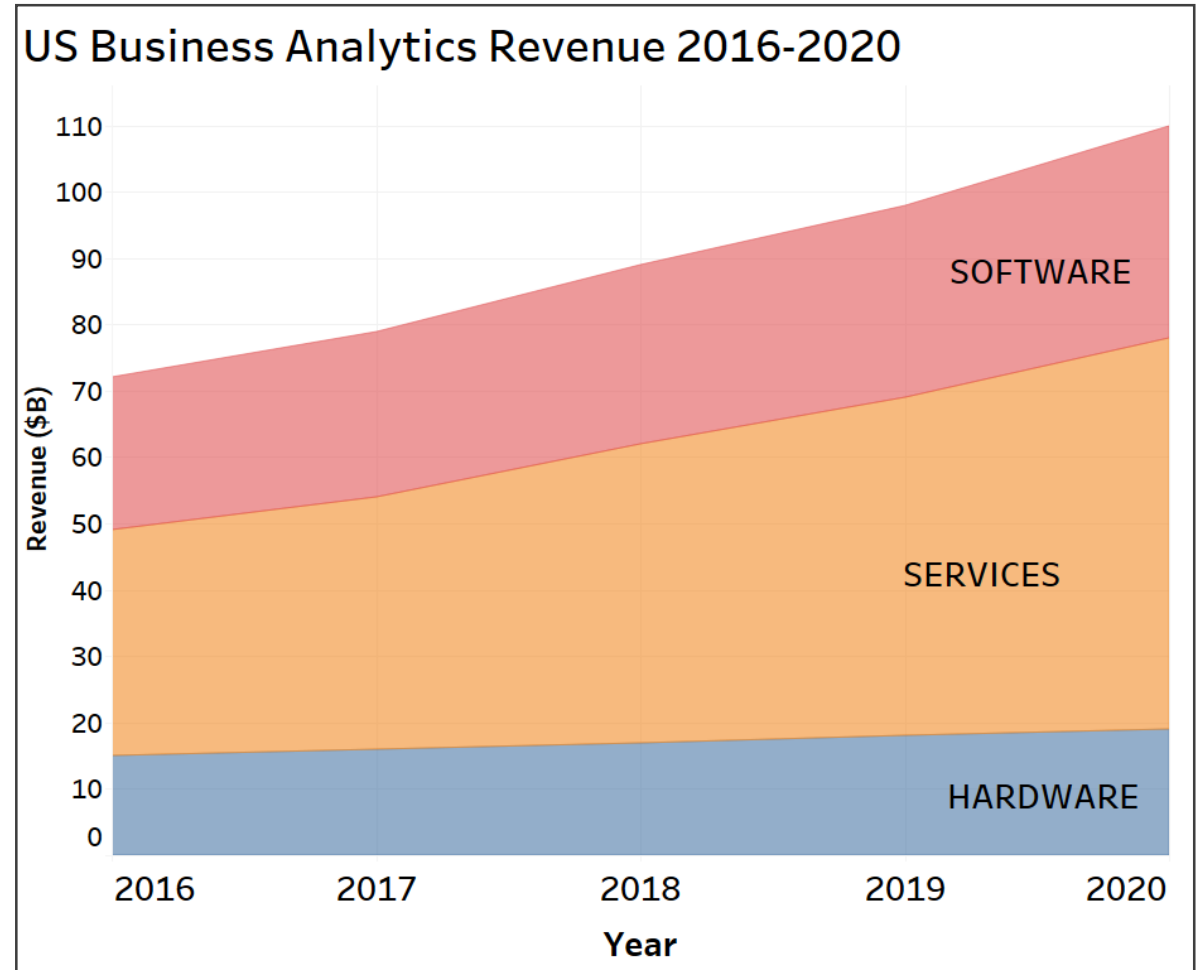
Executive Summary

- > Success breeds success
- > Demonstrate ROI early on
- > Partnering for end-to-end solutions



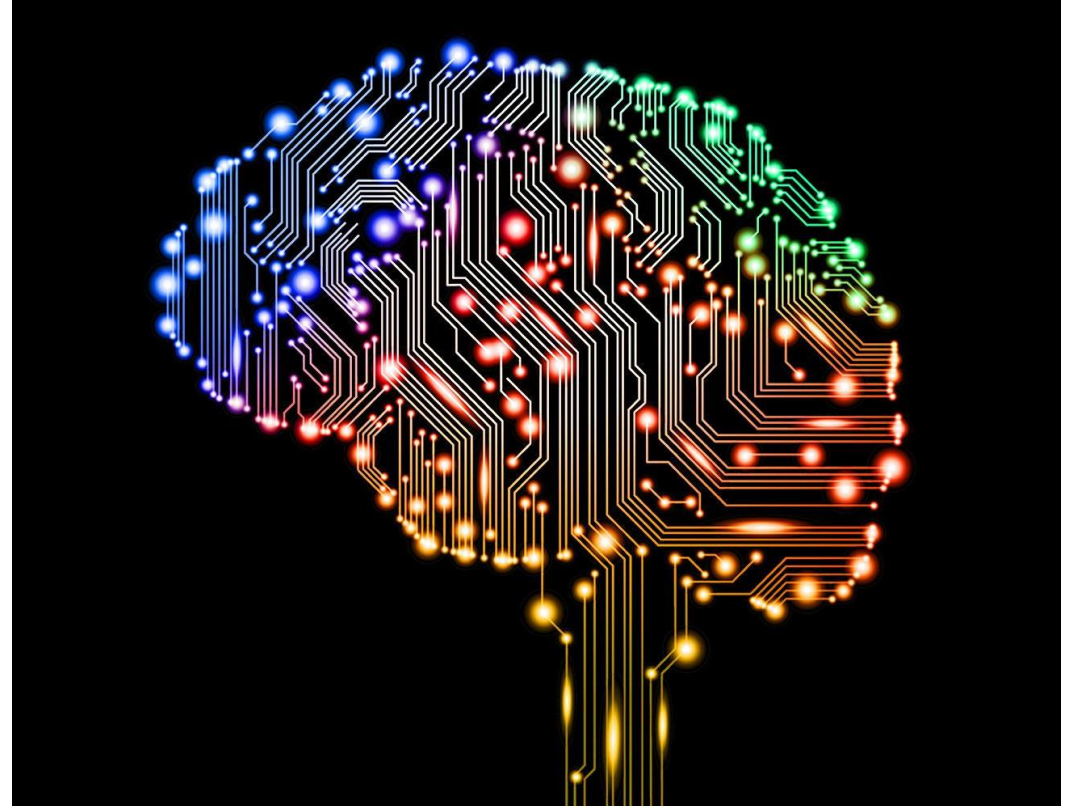
State of Data and Analytics Market

- > \$80B spending forecast in US 2017
 - > 12% CAGR through 2020
- > Everything digital
- > Data monetization
- > “Big Data” is the new normal



Technology Trends

- > AI / cognitive computing
- > Ease of use with analytics tools
- > Smart data discovery
- > Prescriptive analytics
- > Enhanced customer experience



Internet of Things

- > Speed of data driving real-time analytics
- > Cloud at core
- > \$420B IoT spending in US by 2021
- > No “one size fits all” approach



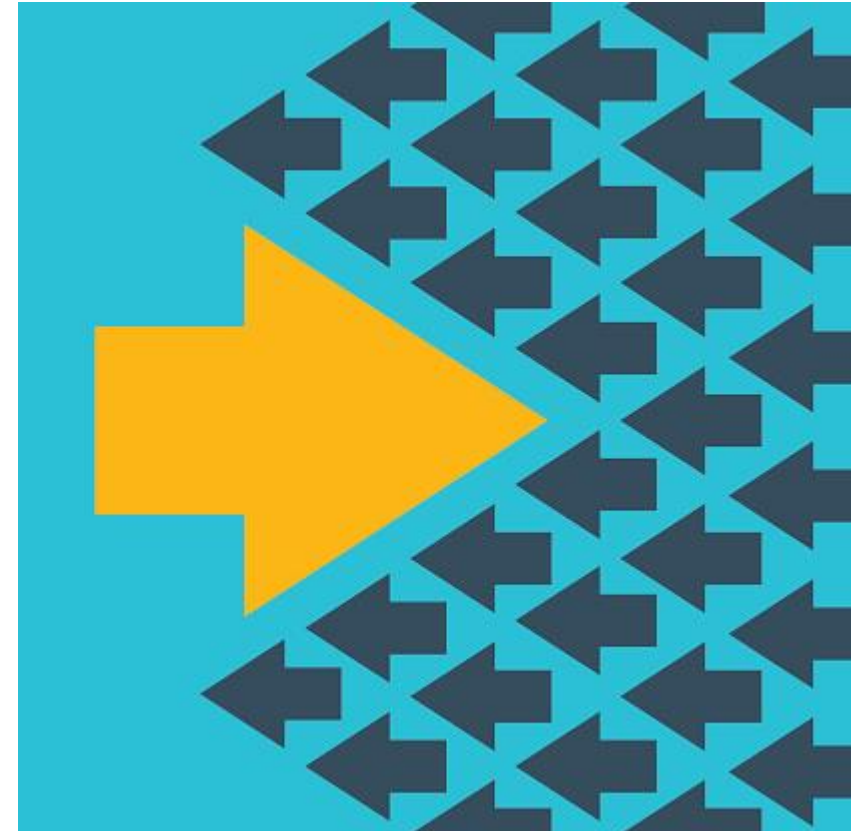
Buyer Trends

- > Reduce time to insight
- > Target ease of use
- > Offer BI solutions in cloud
- > Best-fit engineering / partnerships



Challenges

- > Provide more value to compete with open source technologies
- > Embed data science solutions to stand out from competition
- > Build long-term strategy around AI / IoT; focus on augmented analytics near-term
- > Create data-driven culture by focusing on customer pain points



Data Framework

Data Management & Analytics Framework



Data Integration / Management



> 7% CAGR through 2021

> Seeking cohesive data management solutions for diverse information infrastructure

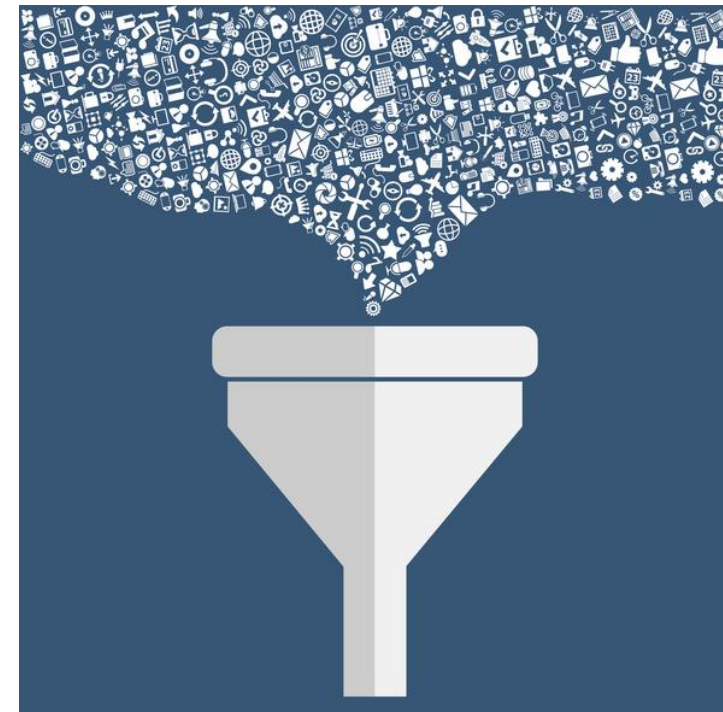
- > Hybrid / cloud deployment
- > Multimodel

> Take broad approach to support distributed data



Storage

- > Shrinking demand for traditional storage
 - > <2% CAGR through 2021
- > Add disruptive technologies to portfolio to better support next generation workloads
 - > 12% CAGR through 2021
- > Take solutions-centric approach as new tech outpaces traditional systems

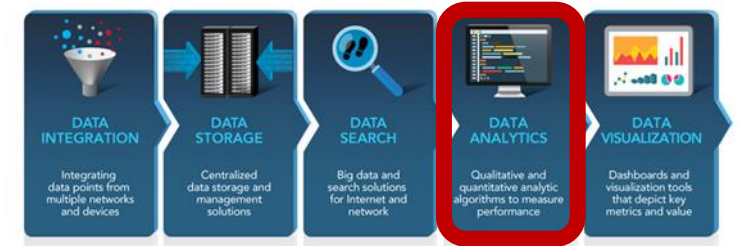


Data Search / Mining

- > 20% CAGR through 2021
- > Map use cases to real-time analytics decision makers
- > Natural-language query (NLP) can help classify data and identify patterns
- > Best used in combination with other BI tools



Business Intelligence & Analytics



- > 8% CAGR through 2021
- > Understand customer level of analytics maturity
- > Provide augmented analytics for more advanced users
- > Build customer analytics capabilities incrementally



Visualization / Outcomes



> 16% CAGR through 2021

> Combine w / smart data discovery tools to remove user bias concerns

> Target self-service / ease of use

> Recommend interactive visualizations for advanced users



Conclusion

- > Understand what decisions end users need to make
- > Speed of success; demonstrate ROI
- > Partner up for end-to-end data management and analytics solutions



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