Mobile Analytics Buyers Guide

Software Provider and Product Assessment

EXECUTIVE SUMMARY

ISG Research

Mobile Analytics

The processes and technology of the mobile analytics software industry play an instrumental role in enabling an enterprise's business units and IT organization to optimize data in both tactical and strategic ways. To accomplish this, enterprises must provide technology to access the data, generate and apply insights from analytics, communicate the results and support collaboration as needed.

ISG Research defines Mobile Analytics as the ability to view and interact with data and analytics on all mobile devices, including phones and tablets. These capabilities can be delivered via native applications; responsive, web-based applications; or a combination. For many years, mobile analytics were delivered via third-party providers specializing in these applications. Today, nearly every analytics software provider offers a mobile application.

The early days of mobile analytics preceded responsive, web-based displays. This also meant that mobile analytics were developed and maintained separately from desktop or laptop analytics. The premise behind these early mobile analytics efforts was to make them available to line-of-business workers as needed in the normal course of conducting business.

Today, accessibility alone is not sufficient. Expectations for mobile applications have grown dramatically. Now, it means providing access to rich, mobile analytics for a workforce seeking to conduct business in any location at any time. Many workers need these mobile capabilities to do their jobs as they switch between desktop/laptop devices when in the office and mobile devices when outside the office or even when attending an internal meeting. Integration between these two modes is critical, and organizations must choose analytics platforms that can deliver on these needs.

Two-thirds of enterprises (67%) consider it important to access analytics from mobile devices.

This Buyers Guide assessment focuses on the challenge of delivering analytics and business intelligence on a variety of mobile devices, including smartphones and tablets. When it comes to smaller devices such as smartphones, it may not be realistic to expect full-blown analyses due to the small form factor, but screen resolution on larger devices such as tablets can support nearly any type of functionality that mobile workers require. These needs are substantial: two-thirds of enterprises (67%) consider it important to access analytics from mobile devices, and more than two-fifths (45%) of organizations report that it is important or very important to be able to address data preparation tasks on mobile devices.

Analytics providers are divided in the approach to providing mobile capabilities. Many software providers invested in developing applications that are native to the two platforms that dominate the mobile landscape: Apple's iOS and Google's Android operating system. Other providers opted to invest in an HTML5 approach, often in combination with a helper application that provides some of the native capabilities, such as participation in the store or marketplace where applications are distributed. Our research suggests that both approaches can be effective. Regardless of the approach, workers need to be able to access the same information whether they are in the office or not. Consequently, we assert that through 2026, enterprises will prioritize investment in analytics products that facilitate seamless switching between mobile and desktop devices to conduct business in any location at any time.

Software providers also differ in the approach to designing mobile applications. Some take a design once and deploy anywhere approach, where every visualization is available on all devices. This approach requires some interpretation of the best mobile layout for each analysis. For instance, a dashboard may consist of four individual visualizations, each occupying one quadrant of the display. On a small mobile device such as a smartphone, these are often presented with each visualization occupying the entire screen and vertical scrolling enabled to move through all four. Other providers offer a mobile design view that provides the opportunity to preview how the devices will display information as well as design visualizations specifically for mobile devices. The former approach makes it easier to build and manage the applications. The latter allows for more control over limited screen real estate for mobile devices.

The small form factor of these mobile devices, especially smartphones, has helped push the boundaries on ease of use. Users can't be expected to make multiple selections and accomplish complex interactions using a small display, so software providers simplified how tasks are performed. In addition, mobile devices offer capabilities such as voice interaction, location information and cameras that can enhance the user experience. Voice interaction can interact with natural language queries and natural language responses. With the advent of generative artificial intelligence, we are seeing more natural language usage, including multilingual capabilities. As support for wearables becomes more prevalent, voice interaction could make those devices much more interactive. In some cases, mobile device information can initiate queries or charts based on location information. Cameras can identify products on retail store shelves by location to help drive sales analyses and projections.

We are also seeing a growing interest in—and increasing capabilities for—collaboration in conjunction with analytics. Two-thirds of enterprises report using or planning to use collaboration with analytics. Collaboration enables organizations to derive more value from analytics by sharing results and interacting with others who use the information in business operations. Collaboration also helps make it easier for individuals to find the information or analyses they need quickly. Mobile technology is critical for successful collaboration because it reaches far into the community of potential collaborators. Users can be informed via mobile devices that a topic of interest requires input or that new information is available.

> **Mobile devices offer capabilities such as voice interaction, location information and cameras that can enhance the user experience.**

The ISG Buyers Guide™ for Mobile Analytics evaluates software providers and product capabilities in three key areas: data, analytics and communications. The richness of the data model and the variety of data sources are important to enabling a mobile workforce. The types of analytics displays and interactions, including mobile-specific capabilities, are evaluated in addition to how mobile analyses are developed and maintained. The communication of information via mobile devices is evaluated, including the types of devices supported, the types of visualizations and interactions available and whether users can collaborate via mobile devices.

This research evaluates the following software providers that offer products to address key elements of mobile analytics as we define it: AWS, Cloud Software, Domo, Google, IBM, Idera, Incorta, Infor, insightsoftware, Microsoft, MicroStrategy, Oracle, Qlik, SAP, SAS, Sisense, Salesforce, ThoughtSpot and Zoho.

Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.**

The ISG Buyers Guide™ for Mobile Analytics is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for mobile analytics software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for mobile analytics to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of mobile analytics technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of mobile analytics software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating mobile analytics systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
   Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
   Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
   Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Oracle atop the list, followed by Microsoft and Domo. Companies that place in the top three of a category earn the designation of Leader. Oracle has done so in six categories; Microsoft and SAP in five; and AWS, Domo, Google, IBM and Qlik in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

Mobile Analytics
Overall

Providers	Grade	Performance
Oracle	A-	*Leader* 84.6%
Microsoft	A-	*Leader* 82.1%
Domo	B++	*Leader* 79.6%
SAP	B++	78.9%
IBM	B++	75.6%
Zoho	B+	73.5%
Salesforce	B+	72.3%
Qlik	B+	71.3%
ThoughtSpot	B+	69.6%
MicroStrategy	B+	69.3%
AWS	B	68.3%
Google	B	67.7%
SAS	B	63.2%
Sisense	B	62.9%
Idera	B-	60.7%
Cloud Software	B-	58.2%
Infor	B-	56.8%
Incorta	C++	54.9%
insightsoftware	C++	53.5%

Source: ISG Research
Mobile Analytics Buyers Guide
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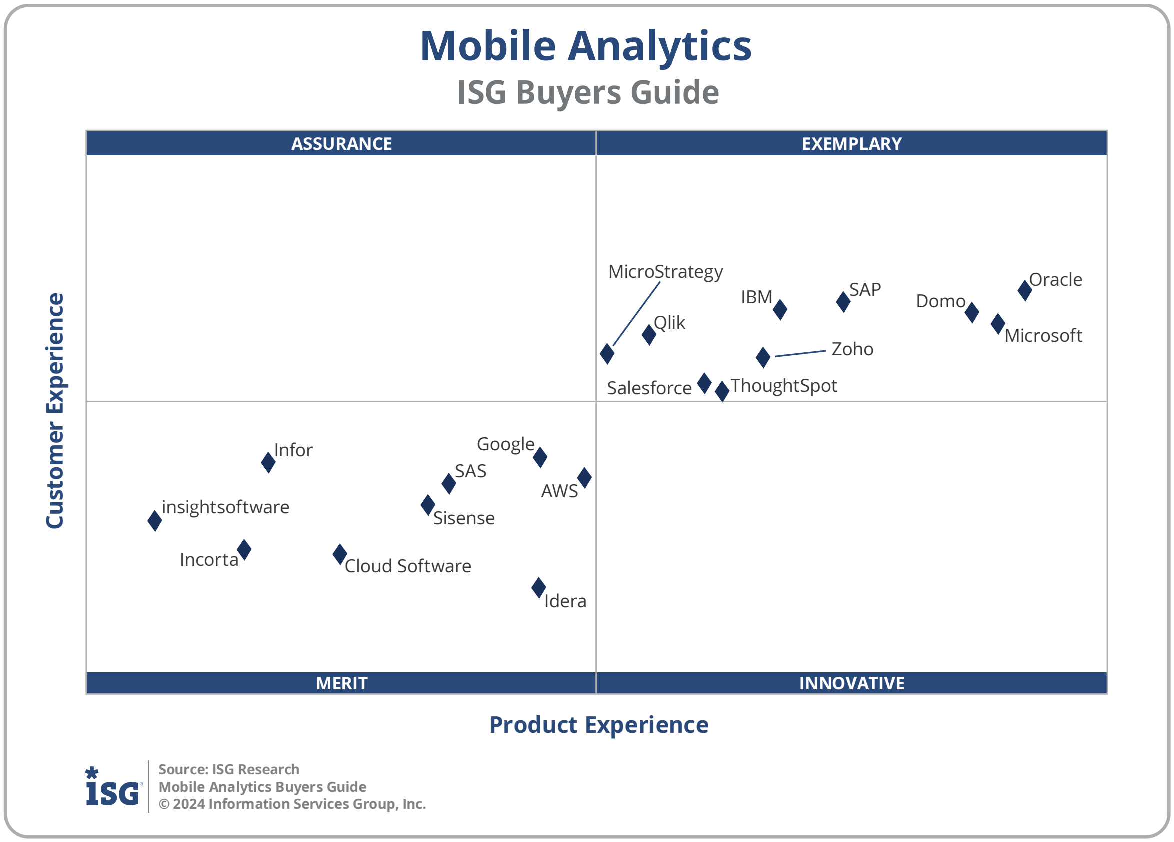

Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Domo, IBM, Microsoft, MicroStrategy, Oracle, Qlik, Salesforce, SAP, ThoughtSpot and Zoho.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. No providers placed in Innovative.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. No providers placed in Assurance.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: AWS, Cloud Software, Google, Idera, Incorta , Infor, insightsoftware, SAS and Sisense.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle mobile analytics, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (20%), Capability (40%), Reliability (5%), Adaptability (5%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Oracle, Microsoft and Domo were designated Product Experience Leaders.

Mobile Analytics

Product Experience

Providers	Grade	Performance
Oracle	A-	*Leader* 65.9%
Microsoft	B++	*Leader* 64.9%
Domo	B++	*Leader* 64.1%
SAP	B+	60.0%
IBM	B+	57.9%
Zoho	B+	57.5%
ThoughtSpot	B+	55.4%
Salesforce	B+	55.1%
Qlik	B	53.9%
MicroStrategy	B	52.5%
AWS	B	52.3%
Google	B	51.0%
Idera	B	51.0%
SAS	B-	48.1%
Sisense	B-	47.5%
Cloud Software	C++	44.6%
Infor	C++	42.3%
Incorta	C++	41.4%
insightsoftware	C+	39.1%

Source: ISG Research
Mobile Analytics Buyers Guide

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

Mobile Analytics

Customer Experience

Providers	Grade	Performance
Oracle	A-	Leader 17.3%
SAP	A-	Leader 17.1%
IBM	A-	Leader 17.0%
Domo	A-	16.6%
Microsoft	A-	16.4%
Qlik	B++	16.2%
MicroStrategy	B++	15.7%
Zoho	B++	15.5%
Salesforce	B++	15.2%
ThoughtSpot	B++	15.0%
Infor	B	13.5%
Google	B	13.4%
AWS	B	13.1%
SAS	B	12.9%
Sisense	B-	12.3%
insightsoftware	B-	11.6%
Incorta	C++	11.2%
Cloud Software	C++	11.0%
Idera	C++	10.2%

Source: ISG Research
Mobile Analytics Buyers Guide

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Oracle, SAP and IBM. These category Leaders best communicate commitment and dedication to customer needs. While not Leaders, Domo and Microsoft were also found to meet a broad range of enterprise customer experience requirements.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Mobile Analytics in 2024, a software provider must be in good standing financially and ethically, have more than 50 dedicated workers and at least $50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 100 customers. The provider must make sufficient information available for an accurate evaluation. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months. The product must be actively marketed as an analytics product that supports mobile devices and is capable of accessing data from a variety of sources, analyzing the data using a variety of techniques, communicating the results in a variety of ways and supporting the data and analytics processes within an organization.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant mobile analytics products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
AWS	Amazon QuickSight Amazon QuickSight (Android) Amazon QuickSight (iOS)	October 4 2.1.25	October 2024 August 2024 September 2024
Cloud Software	Spotfire Spotfire for Android Spotfire for iOS	14.4 1.4.7 2.14.0	June 2024 October 2024 December 2023
Domo	Domo Domo (iOS)	October 4.17.1	October 2024
Google	Looker / Looker Studio Pro Looker Mobile	24.18 / October 31 1.3.3	October 2024 December 2023
IBM	IBM Cognos Analytics IBM Cognos Analytics Mobile IBM Cognos Analytics Reports	12.0.4 1.1.2.0 11.7.62	October 2024
Idera	Yellowfin Yellowfin Mobile	9.13.0.1 1.1.1	October 2024
Incorta	Incorta Data Direct Platform; Incorta Cloud Incorta (iOS)	2024.7.2 2024.7.2 5.4.1	July 2024 July 2024 November 2023
Infor	Infor Birst	2024.x	October 2024
insightsoftware	Logi Symphony	24.3	October 2024
Microsoft	Power BI	October 2024 Update (2.137.751.0)	October 2024
MicroStrategy	MicroStrategy ONE MicroStrategy Mobile MicroStrategy Library Mobile MicroStrategy HyperMobile	11.4.9	September 2024
Oracle	Oracle Analytics Cloud; Oracle Analytics Server	2024 F24230-25	September 2024
Qlik	Qlik Cloud; Qlik Sense	1.174.9 May Release	October 2024 May 2024
Salesforce	Tableau Cloud, Tableau Server, Tableau Embedded Analytics, Tableau Data Management, Tableau Advanced Management, Tableau Desktop, Tableau Prep, Tableau Mobile	2024.3	October 2024

SAP	SAP Analytics Cloud	Q3 2024 (2024.15)	August 2024
SAS	SAS Viya	2024.10	October 2024
Sisense	Sisense Fusion Sisense Mobile BI	L2024.3 3.0.2	October 2024
ThoughtSpot	ThoughtSpot Analytics	10.3.0.cl / 9.8.0sw	October 2024
Zoho	Zoho Analytics	6.0	September 2024

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	$50M Revenue	50 Workers	100 Customers	Available Information
Kyvos	Kyvos Insights	No	Yes	Yes	Yes
OpenText	Magellan	Yes	Yes	Yes	No
Pyramid Analytics	Pyramid	No	Yes	Yes	Yes
Sigma Computing	Sigma	No	Yes	Yes	Yes

About ISG Software Research

ISG Software Research provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through our community, and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premier service, ISG Software Research On-Demand, provides structured education and advisory support with subject-matter expertise and experience in the software industry. ISG Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored Assessment Services and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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