The Forrester Wave™: Data Preparation Tools, Q1 2017
The Seven Providers That Matter Most And How They Stack Up
by Cinny Little
March 13, 2017

Key Takeaways

Paxata And Trifacta Lead The Pack
Forrester’s research uncovered a market in which Paxata and Trifacta lead the pack, with Alteryx, Datawatch, Oracle, Paxata, SAS, Trifacta, and Unifi — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights (CI) professionals and their technology partners make the right choice.

CI Pros Urgently Need Self-Service And Independence From Technology Management
The data preparation tools market is growing and evolving because CI, marketing, and operations professionals recognize the urgency of speeding up their ability to use data for actionable insights. Every vendor in this landscape is tracking toward this goal.

Ease Of Use For Business Users And Scalable Execution Architecture Are Key Differentiators
Traditional data management overhead gets in the way of analytical agility and fast insights for action with outcomes. For this reason, effective time-to-value for business users — balanced with rigorous transparency and oversight — will dictate which providers lead the pack. Vendors that provide scalable, extensible tools with strong ease of use through machine learning and collaboration capabilities position themselves to deliver faster time-to-insights to their customers.

Why Read This Report
In our 21-criteria evaluation of data preparation tool providers, we identified the seven most significant ones — Alteryx, Datawatch, Oracle, Paxata, SAS, Trifacta, and Unifi — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights (CI) professionals and their technology partners make the right choice.
The Forrester Wave™: Data Preparation Tools, Q1 2017
The Seven Providers That Matter Most And How They Stack Up

by Cinny Little
with Gene Leganza and Jun Lee
March 13, 2017

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Related Research Documents

Brief: Data Preparation Tools Accelerate Analytics

The Forrester Wave™: Native Hadoop BI Platforms, Q3 2016

Vendor Landscape: Data Preparation Tools
Data Preparation Tools Are A Must-Have Accelerator Of Time-To-Insight

To remain competitive, firms must speed up driving data to insights in all areas of the business. Doing that requires cutting overhead and inefficiencies from traditional data management timelines and, most important, driving from insights to actions that have business impact. Customer-obsessed firms align on key customer-centric metrics and take the actions that matter most on the insights they derive from data (see Figure 1). Forrester projects that insights-driven businesses — companies that embed analytics and software deeply into their customer-centric operating model — will grow revenue at least eight times faster than global GDP. Business executives clearly understand the value of data and analytics (see Figure 2). Our survey data shows us that:

› **Data and analytics pros seek low-friction access to data with fast time-to-value.** Data and analytics professionals’ top priorities include improving the complete view of the customer across channels and providing self-service data management tools for business users and analysts.

› **Marketing pros’ top priorities focus on evidence-driven insights.** Marketing pros prioritize the use of data and analytics for marketing measurement, customer insight, brand strength, and improving marketing effectiveness/ROI. In addition, the development of new products requires broad and deep understanding of customer experience through data and analytics.
FIGURE 1 Data Must Drive Insights About The Actions That Matter Most To Customer-Centric Metrics

Customer-centric metrics and key performance indicators (KPIs)

Data

Insights

Customer experiences that matter most to business outcomes
FIGURE 2 Friction-Free Access To Data Is A Top Priority For Data/Analytics And Marketing Professionals

Data and analytics pros

“What are your firm’s plans for the following data-driven initiatives?”
(Implemented/expanding)

- Improving our complete view of the customer across channels: 58%
- Recruiting more people with advanced data skills: 54%
- Implementing analytics insights in software systems to aid customers or support employee decisions: 54%
- Investing in platforms to share out data content: 52%
- Changing our management culture to rely more on quantitative decisions: 52%
- Providing data preparation tools for self-service data management: 52%
- Enabling self-service BI: 52%

Base: 3,343 global data and analytics decision makers
(multiple responses accepted; top seven responses shown)
Source: Forrester Data Global Business Technographics® Data And Analytics Survey, 2016
### Marketing pros

**“Which of the following are likely to be your organization’s top initiatives over the next 12 months?”**

(High or critical priority)

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh or strengthen our company’s brand</td>
<td>73%</td>
</tr>
<tr>
<td>Improve the ROI/effectiveness of marketing</td>
<td>72%</td>
</tr>
<tr>
<td>Align brand promise with customer experience</td>
<td>71%</td>
</tr>
<tr>
<td>Increase our use of data and analytics (including marketing measurement and customer insight)</td>
<td>70%</td>
</tr>
<tr>
<td>Drive customer centricity</td>
<td>69%</td>
</tr>
<tr>
<td>Develop new products or services</td>
<td>68%</td>
</tr>
<tr>
<td>Improve our content marketing capabilities</td>
<td>68%</td>
</tr>
</tbody>
</table>

Base: 1,072 global marketing decision makers  
(multiple responses accepted; top seven responses shown)  

### Data/Analytics And Marketing Pros' Top Priorities Require Friction-Free Access To Data

To accelerate time-to-insights and time-to-actions, business end users and analysts who today wrangle data in spreadsheets or other traditional tools need direct access to data and a significant power assist. Data preparation tools can provide this power, but they must balance features and functions to support different roles and use cases and enable appropriate manageability, security, and governance in today’s enterprises — while at the same time delivering speed-to-value. There are relatively few products that meet those requirements, despite claims by many. Some true data preparation players are large, established players in the business intelligence (BI) and analytics space that have chosen to market and sell their data prep tool as a standalone offering, while others are pure-play offerings and, within that, emphasize different features and functions.²
Data Preparation Tools Evaluation Overview

To assess the state of the data preparation tools market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top data prep vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of 21 evaluation criteria, which we grouped into three high-level buckets:

› **Current offering.** Our evaluation focused on functional capabilities in seven core areas: discovery and blending, standardization and enrichment, transformation, delivery (pipelines, analytics, security and governance), sharing and collaboration, deployment, and customer experience. The evaluation of customer experience (including usability, time-to-value, and vendor relationships) incorporated a consideration of vendors’ customer reference feedback through a survey and interviews.

› **Strategy.** We evaluated each vendor’s product road map to assess how it will affect the vendor’s competitive position compared with the other vendors in this evaluation. We also evaluated each vendor’s partner strategy, including both technology and services providers. Finally, we evaluated each vendor’s market strategy to assess their ability to compete and grow in the evolving data preparation tools market.

› **Market presence.** The market presence criteria, which determine the size of the bubble on the Forrester Wave graphic but have no weight in terms of overall scoring, include customer base, global breadth, and product revenue (not counting services).

**Evaluated Vendors And Inclusion Criteria**

Forrester included seven vendors in the assessment: Alteryx, Datawatch, Oracle, Paxata, SAS, Trifacta, and Unifi. Each of these vendors has (see Figure 3):

› A comprehensive standalone data preparation tool they actively market and sell.

› More than 50 paying customers for their data preparation tool, of which at least half are enterprises with $500 million or more in annual revenue.

› At least 15% of paid licenses that cover more than 25 users as well as over $1 million in revenue in the 12 months prior to the end of 2016 for their data preparation tool.

› Forrester clients who show interest in these products in the context of inquiry, advisory, and consulting.
### FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

<table>
<thead>
<tr>
<th>Vendor name</th>
<th>Product evaluated</th>
<th>Product version evaluated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alteryx</td>
<td>Alteryx Analytics</td>
<td>10.6</td>
</tr>
<tr>
<td>Datawatch</td>
<td>Monarch</td>
<td>14</td>
</tr>
<tr>
<td>Oracle</td>
<td>Oracle Big Data Preparation Cloud Service</td>
<td>16.4.5</td>
</tr>
<tr>
<td>Paxata</td>
<td>Paxata Adaptive Platform</td>
<td>Winter 2016</td>
</tr>
<tr>
<td>SAS</td>
<td>SAS Data Loader For Hadoop</td>
<td>3.1</td>
</tr>
<tr>
<td>Trifacta</td>
<td>Trifacta Wrangler Enterprise</td>
<td>4.0</td>
</tr>
<tr>
<td>Unifi</td>
<td>Unifi</td>
<td>1.16</td>
</tr>
</tbody>
</table>

**Vendors invited to participate in this evaluation meet the following criteria:**

- They actively market and sell a comprehensive standalone data preparation tool.
- They have more than 50 paying customers for their data preparation tool, of which at least half are enterprises with at least $500 million in annual revenue.
- At least 15% of paid licenses cover more than 25 users, and the vendors had greater than $1 million in revenue in the 12 months prior to the end of 2016 for their data preparation tool.
- They have Forrester clients that show interest in these products in the context of inquiry, advisory, and consulting.
Vendor Profiles

This evaluation of the data preparation tools market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4).

FIGURE 4 Forrester Wave™: Data Preparation Tools, Q1 '17

Challengers Contenders Strong Performers Leaders

Current offering

Market presence

Full vendor participation
Incomplete vendor participation

Strong
Weak

SAS
Unifi
Paxata
Trifacta
Alteryx
Oracle
Datawatch

Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.
### FIGURE 4 Forrester Wave™: Data Preparation Tools, Q1 ’17 (Cont.)

<table>
<thead>
<tr>
<th>Current Offering</th>
<th>Forrester's weighting</th>
<th>Alteryx</th>
<th>Datawatch</th>
<th>Paxata</th>
<th>SAS</th>
<th>Trifacta</th>
<th>Unifi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discover and blend</td>
<td>50%</td>
<td>2.71</td>
<td>2.29</td>
<td>4.90</td>
<td>2.72</td>
<td>4.62</td>
<td>3.47</td>
</tr>
<tr>
<td>Standardize and enrich</td>
<td>20%</td>
<td>1.60</td>
<td>1.60</td>
<td>5.00</td>
<td>1.60</td>
<td>5.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Transform</td>
<td>15%</td>
<td>2.20</td>
<td>1.40</td>
<td>5.00</td>
<td>3.00</td>
<td>5.00</td>
<td>3.80</td>
</tr>
<tr>
<td>Deliver</td>
<td>15%</td>
<td>1.70</td>
<td>1.35</td>
<td>4.30</td>
<td>2.30</td>
<td>5.00</td>
<td>3.70</td>
</tr>
<tr>
<td>Sharing</td>
<td>10%</td>
<td>3.00</td>
<td>2.00</td>
<td>5.00</td>
<td>4.00</td>
<td>4.40</td>
<td>2.40</td>
</tr>
<tr>
<td>Deployment</td>
<td>10%</td>
<td>1.00</td>
<td>1.00</td>
<td>3.00</td>
<td>5.00</td>
<td>5.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Customer experience</td>
<td>15%</td>
<td>5.00</td>
<td>3.80</td>
<td>5.00</td>
<td>3.00</td>
<td>3.40</td>
<td>1.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Forrester's weighting</th>
<th>Alteryx</th>
<th>Datawatch</th>
<th>Paxata</th>
<th>SAS</th>
<th>Trifacta</th>
<th>Unifi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product strategy</td>
<td>50%</td>
<td>4.40</td>
<td>4.10</td>
<td>3.30</td>
<td>3.00</td>
<td>4.40</td>
<td>1.90</td>
</tr>
<tr>
<td>Partner strategy</td>
<td>30%</td>
<td>3.00</td>
<td>4.00</td>
<td>4.00</td>
<td>3.00</td>
<td>5.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Market strategy</td>
<td>30%</td>
<td>5.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Market Presence</th>
<th>Forrester's weighting</th>
<th>Alteryx</th>
<th>Datawatch</th>
<th>Paxata</th>
<th>SAS</th>
<th>Trifacta</th>
<th>Unifi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer base</td>
<td>40%</td>
<td>3.80</td>
<td>4.10</td>
<td>3.90</td>
<td>3.90</td>
<td>3.60</td>
<td>1.70</td>
</tr>
<tr>
<td>Global breadth</td>
<td>30%</td>
<td>5.00</td>
<td>5.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>2.00</td>
</tr>
<tr>
<td>Product revenue</td>
<td>30%</td>
<td>1.00</td>
<td>1.00</td>
<td>5.00</td>
<td>5.00</td>
<td>5.00</td>
<td>1.00</td>
</tr>
</tbody>
</table>

All scores are based on a scale of 0 (weak) to 5 (strong).
Leaders

› **Trifacta delivers a strong balance for self-service by analysts and business users.** Trifacta leverages machine learning algorithms to automate and simplify the interaction with data, making data wrangling self-service for analysts and business users. A key element of its strategy is encouraging trials via its free Wrangler product. This approach serves double duty, as it also enables Trifacta to leverage a large corpus of data from the thousands of users of this free version to inform its machine learning models. The vendor has a strong focus on providing customer programs and resources including a curriculum, certification program, and extensive knowledge base. Trifacta has the most sophisticated approaches of evaluated vendors for sampling and automatic transformation processing options. Customer references gave high marks to Trifacta’s ease of use. However, customers also said that search and collaboration through commenting and annotating needed improvement.

› **Paxata focuses on usability and fast time-to-insights for business analysts.** Paxata is powered by a unified set of technologies designed to support and balance data integration, quality, governance, collaboration, and enrichment. The vendor combines a user experience that’s intuitive for business analysts, along with machine learning plus text and semantic analytics so analysts can connect data quickly and get to insights faster. Its differentiators include a ClicktoPrep feature that enables bidirectional contextual integration with BI tools, the use of Spark for large-scale data prep, and a multitenant architecture purpose-built for the cloud. Paxata’s strategy focuses on growing its partner ecosystem for market expansion and delivery of certified integration and interoperability with third-party products. Customer references gave top scores across all usability and time-to-value features. But they also indicated that Paxata’s search capability needed improvement and that connection to some legacy data sources was not optimized.

Strong Performers

› **Alteryx provides deeper data insights from in-tool advanced analytics.** Alteryx is known for empowering business users with data preparation and advanced analytics. On the business model side, Alteryx’s success in building its partner and technology ecosystem is a key competitive strength, providing value-added flexibility to customers as well as a growth engine for the company — partners account for a significant portion of its new business and revenue growth in emerging markets. Customer references had a very positive view of the ability to get up and running quickly with Alteryx. While its drag-and-drop “workflow” user interface seems unintuitive at first look, customer references gave top scores to its ease of use. Customer references would like stronger search capabilities and pointed to two areas that highlight Alteryx’s weaker machine learning compared with other vendors evaluated: 1) a strong desire for more relevant suggestions for actions they can take in working with the data and 2) automation in pointing out outliers or unlikely data values.
› **Datawatch excels when semi- or unstructured data sources are priorities.** Datawatch has been in the “big data” business since long before that term existed, and its large customer base reflects that. For data preparation, customers depend on Datawatch Monarch’s legacy strength in extracting and processing data from reports and documents. While other evaluated tools are stronger in critical attributes like analytics, customer references gave good scores for Monarch’s ease of use and gave top scores on its ability to quickly automate time-consuming or repeated manual tasks. Compared with other evaluated vendors, Datawatch’s machine learning capabilities are an area for improvement, and customer references concurred — for example, pointing out a desire to “get more suggestions and help” in data preparation. The company’s land-and-expand market strategy incorporates a free trial version of Monarch.

› **SAS Data Loader For Hadoop is purpose-built to manage big data on Hadoop.** An established leader in analytics, big data, data integration, and data quality, SAS built this data preparation tool for the benefit of its customer base as a response to the democratization of data and the popularity of Hadoop. The vendor cited the product as one of its most successful recent launches. Customer references, all users of broader SAS offerings, gave top scores to the tool’s abilities to connect to more data sources than they were accustomed to and its ability to turn data prep steps into repeatable pipelines. However, references gave low scores to highly valued features available in other tools we evaluated, such as machine learning, search, and the ability to collaborate in the tool. While SAS has had a cadence of releases of the tool every six months for the past two years, customer feedback indicated low responsiveness “when problems arise” with using the tool.

**Contenders**

› **Unifi combines both self-service data discovery and preparation on one platform.** Unifi’s user experience for data discovery and preparation is a six-step process on all jobs: connect, discover, cleanse/enrich, transform, and format for viewing. As the cloud-optimized tool learns from others’ actions in an organization, its machine learning makes recommendations to the user at each step. Unifi’s go-to-market approach includes a series of common use-case solutions for data preparation. For example, Moxi is Unifi’s microtargeting optimization platform for B2B sales. It enables combining first- and third-party data to deliver a precise, stack-ranked sales hunt list to an individual sales rep via a web and mobile interface. Additional use-case solutions include a marketing campaign optimization platform, a market intelligence tool that can search online digital files, and a solution for supply chain operations. Unifi’s tool has the strongest natural language search among evaluated vendors.

› **Oracle’s Big Data Preparation Cloud Service provides self-service for business users.** Available in the Oracle Cloud and powered by Apache Spark and Hadoop, Big Data Preparation Cloud Service (BDP) provides strong capabilities for data ingestion, preparation, enrichment and governance, and balancing business end user and technology management data steward requirements. As with the other evaluated vendors’ solutions, BDP provides independence
and speed-to-insight to business users for data preparation. The UI is interactive and provides recommendations guided by machine learning. Statistical profiling identifies issues with data, and a monitoring dashboard provides strong governance. BDP launched in Q4 2015 along with Oracle’s Big Data Discovery (BDD) platform. Our Q3 2016 Forrester Wave evaluation of native Hadoop BI platforms named Oracle a Strong Performer, recommending Oracle BDD’s advanced data prep and data visualization within a single seamlessly integrated platform. Oracle declined to participate in this evaluation.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of six data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by March 1, 2017.

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Executive strategy briefings.** Forrester asked participants to describe the company’s background, positioning, value proposition, customer base, and strategic services vision.

- **Product demos.** We asked vendors to conduct demonstrations of their products’ functionality. We used findings from these product demos to validate details of each vendor’s product capabilities.

- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls or conducted surveys with at least one of each vendor’s current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on 1) product fit, 2) customer success, and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don’t fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and
market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

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Survey Methodology

The Forrester Data Global Business Technographics® Marketing Survey, 2016 was fielded in May and June 2016. This online survey included 1,072 respondents in Brazil, Canada, China, France, Germany, India, the UK, and the US from companies with either 500 or more employees (the US, Canada, Germany, France, the UK, India, and China) or 100 or more employees (Brazil).

The Forrester Data Global Business Technographics Data And Analytics Survey, 2016 was fielded in March 2016. This online survey included 3,343 respondents in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with 100 or more employees.

Forrester Data’s Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Research Now fielded these surveys on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in these surveys should not be used to measure market share. The purpose of Forrester Data’s Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

1 Using conservative estimates, we forecast that these insights-driven public companies will grow 27% annually and the startups will grow 40% — at least eight times faster than the projected global 3.5% GDP growth. Why? Because they harness digital insights to optimize their products, services, and operations. See the Forrester report “The Insights-Driven Business.”

2 See the Forrester report “Vendor Landscape: Data Preparation Tools.”

3 Forrester recommends Oracle BDD to clients who want to combine advanced data prep and data visualization in a single seamlessly integrated platform. Clients who already use OBI 12c but need to look beyond schema-on-write-based analytics, or who need more advanced data prep capabilities than the Oracle Data Visualization tool provides, have another choice: They should consider BDD as a powerful data exploration tool. See the Forrester report “The Forrester Wave™: Native Hadoop BI Platforms, Q3 2016.”
We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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