How to Utilize Gartner’s Market Research?

Jennifer Wu/吳瑞蓮
Research VP
March 2, 2009
Why Do You Need Gartner’s Market Research?

- 寻找商机
- 了解使用者的需求
- 观察市场的变化
- 寻求第三者的意见
- 寻找商机
- 減低風險
- 制定投资策略
- 撥雲見日
Who Are the Gartner Analysts?

650 Analysts Across 6 Continents

- More than 100 Gartner analysts based in Asia.
- More than 150 Gartner analysts based in Europe.
- Gartner analysts have an average of 12 years of experience in the IT Industry before joining Gartner.
- More than 50% of Gartner analysts have in excess of 20 years of experience in IT.
- More than 45% of Gartner analysts have a post graduate education.
- More than 40% of Gartner analysts speak 2 or more languages fluently. A total of 43 languages are spoken within Gartner Research.
- Gartner analysts cover more than 2300 Technology and Service providers in depth.
- More than 7500 specific areas of expertise or topics are covered by Gartner Analysts.
The Web of Influence: A Global Outlook

Research Teams

Research Communities

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Gartner Analysts benefit from Collaborative Research Communities
“Community：資訊多元化的分享”

- A flexible, virtual structure of global teams
- Decentralized yet connected
- Able to respond quickly to market changes
- Gartner analysts are always working:
  1. Across multiple dimensions and agendas
  2. Vertically and horizontally
  3. In collaborative “communities”
Coverage – Infrastructures：研究範圍

Vertical View: Technology

1. Applications
2. Business Intelligence & Information Management
3. Business Process Improvement
   Enterprise Architecture
4. IT Infrastructure & Operation
5. Program & Portfolio Management
7. Sourcing & Vendor Relationships
<table>
<thead>
<tr>
<th>Coverage product insight</th>
<th>研究範圍</th>
</tr>
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<tbody>
<tr>
<td><strong>Communications</strong></td>
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<td>Communications Service Providers</td>
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<td>Communications Services</td>
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<td>Enterprise Infrastructure and Applications</td>
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<tr>
<td>Mobile Devices and Phones</td>
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<tr>
<td><strong>Hardware</strong></td>
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<td>PCs and Workstations</td>
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<td>Printers and Copiers</td>
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<tr>
<td>Servers</td>
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<tr>
<td>Storage</td>
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<td>Security</td>
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<td><strong>Software</strong></td>
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<td><strong>IT Services</strong></td>
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<td>Cloud Computing</td>
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<td>Outsourcing</td>
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<td><strong>Semiconductors</strong></td>
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<tr>
<td>Semiconductor Manufacturing</td>
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</table>
Methodology: 研究方法
Gartner = 360-degree Insight

- **Market insight (demand)** (市場分析)
  We know your markets, how they work, how they will change and the critical success factors.

- **Customer insight** (客戶需求)
  We talk to business and technology clients/buyers, and know their preferences and supplier-selection criteria.

- **Competitor insight** (競爭對手的分析)
  We work with and understand your competitors and the partners you depend on within the value chain.

- **Technology insight** (技術的分析)
  Our unique breadth and depth enables us to anticipate major opportunities and threats.

- **Expert Advice** (專家的建議)
  Gartner analysts can provide tailored, timely advice to help you build and execute your growth strategy.
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Gartner = 360-degree Insight
Market Insight

Server data included: 48 countries, 6-subregions and 9 technologies quarterly

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Hewlett-Packard</th>
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<table>
<thead>
<tr>
<th>Data</th>
<th>Cpu Group</th>
<th>Max CPU</th>
<th>Sub Brand</th>
<th>OS Family</th>
<th>OS</th>
<th>Price Band</th>
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<td>x86 64</td>
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<td>ProLiant DL320</td>
<td>Linux</td>
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<td>Other</td>
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<td>NetWare</td>
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<td>NetWare Total</td>
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<td>Other Total</td>
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Market Insight – 專題報導

Market Trends: International Data Services, Asia/Pacific, 2008
Market Trends: International Data Services, North America, 2008
Market Trends: IT Solutions in Discrete Manufacturing, 2009
Market Trends: PCs, Asia/Pacific, 3Q08
Market Trends: PCs, EMEA, 3Q08
Market Trends: Printers, Copiers and MFPs, Asia/Pacific, 2Q08
Market Trends: Servers, Japan, 1H08
Forecast: Broadband Access Systems, Asia/Pacific (Excluding Japan), 2006-2012 (4Q08 Update)
Forecast: Broadband Access Systems, Western Europe, 2006-2012, (4Q08 Update)
Forecast: Carrier Network Infrastructure, Worldwide, 2003-2012 (4Q08 Update)
Forecast: DRAM Supply and Demand, Worldwide, 1Q07-4Q09 (4Q08 Update)
Forecast: IT Services, Worldwide, 2008-2012 Update and Worst-Case Scenario
Forecast: Mobile Network Infrastructure, Worldwide, 2006-2012 (4Q08 Update)
Forecast: NAND Flash Supply and Demand, Worldwide, 1Q07-4Q09 (4Q08 Update)
Forecast: Optical Transport Systems, Asia/Pacific and Japan, 2003-2012 (4Q08 Update)
Forecast: PC Market By Operating System, Worldwide, November 2008 Update
Forecast: Semiconductor Capacity, Worldwide, 4Q08 Update
Forecast: USB Flash Drives, Worldwide, 2002-2012
Forecast: Voice Switching, Control and Applications, Latin America, 2007-2012
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Which of the following are reasons why your organization has already deployed or plans to deploy virtualization in the future?

- Improving thermal management
- Reducing datacenter space used by x86 servers
- Improving the speed of application deployment
- Reducing physical x86 server sprawl through consolidation
- Lowering energy consumption
- Reducing overall total cost of ownership for x86 servers
- Reducing server hardware capital expenditure
- Enhancing application availability

Why no plans to virtualize servers

- Not enough servers to justify the investment
- Cost of adding staff/expertise to manage and administer virtualization
- Lack of technical support either from vendors or channels
- Using blade servers without virtualization to get some of the same benefits
- Increased risk of running multiple applications on a single physical server
- Fears it could negatively impact application or server performance
- Not familiar with this technology
- Too early. Waiting for technology to mature

N = 37
N = 46
Methodology: 研究方法
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Customer Insight—専題報導

User Survey Analysis: Mobile Consumers, China, 2008
User Survey Analysis: ESPs Must Help Build Business Cases and Transfer Knowledge to Win SOA Projects
User Survey Analysis: Storage Management Software Usage Driven by Virtualization, Deduplication and Replication, September 2008
User Survey Analysis: Retail Spending Trends, North America, 2008
User Survey Analysis: What Providers Need to Know About Midmarket Storage Plans
User Survey Analysis: Adoption of Security as a Service and Open-Source Security Is Increasing in Asia/Pacific in 2008
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Methodology: 研究方法
Gartner = 360-degree Insight- Competitor Insight
Magic Quadrant – Server vendor

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Magic Quadrant –專題報導

SWOT: Redback Networks, Service Provider Edge Routers and Switches, Worldwide
SWOT: Verizon Business' Enterprise Network Services, Worldwide
SWOT: Freescale Semiconductor, Worldwide
SWOT: Seagate Technology, Worldwide
SWOT: Microsoft, Business Intelligence Platforms, Worldwide
SWOT: Accenture, BPO, Worldwide
SWOT: First Solar, Worldwide
SWOT: Foxconn Technology Group, Worldwide
SWOT: Lenovo, Worldwide
SWOT: Lexmark International, Worldwide
SWOT: HTC, Worldwide
SWOT: Dell, Servers, Worldwide
SWOT: Marvell Technology Group, Worldwide
SWOT Analysis: ASUSTeK's PC Business
SWOT Analysis: IBM, Business Process Outsourcing, Worldwide
SWOT Analysis: ADP, Business Process Outsourcing, Worldwide
SWOT: LG, Mobile Communications, Worldwide
SWOT: Samsung Mobile Devices, Worldwide
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<table>
<thead>
<tr>
<th>Technology Profiles</th>
<th>Benefit Rating</th>
<th>Market Penetration</th>
<th>Maturity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ultra-mobiles Devices</td>
<td>Low</td>
<td>Less than 1% of target audience</td>
<td>Emerging</td>
</tr>
<tr>
<td>Hosted Virtual Desktops</td>
<td>High</td>
<td>Less than 1% of target audience</td>
<td>Adolescent</td>
</tr>
<tr>
<td>PC Application Virtualization</td>
<td>High</td>
<td>5% to 20% of target audience</td>
<td>Early Mainstream</td>
</tr>
<tr>
<td>Mini-notebooks</td>
<td>Transformational</td>
<td>Less than 1% of target audience</td>
<td>Emerging</td>
</tr>
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</table>
### Methodology: 研究方法
**Gartner = 360-degree Insight - Technology Insight**
**Hype Cycle PC Technologies 2008**

<table>
<thead>
<tr>
<th>Total Hype Cycle documents: 102</th>
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</thead>
<tbody>
<tr>
<td>Auto Electronics</td>
</tr>
<tr>
<td>Biometric Technologies</td>
</tr>
<tr>
<td>China, Emerging Technologies</td>
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<tr>
<td>Consumer Goods</td>
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<tr>
<td>Consumer Technologies</td>
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<tr>
<td>CRM Marketing Applications</td>
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<td>Discrete Manufacturing</td>
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<tr>
<td>Emerging Technologies</td>
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<tr>
<td>Enterprise Speech Technologies</td>
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<tr>
<td>ICT in China</td>
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<td>Media Industry</td>
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<tr>
<td>Networking and Communications</td>
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<tr>
<td>PC Technologies</td>
</tr>
<tr>
<td>Wireless Hardware</td>
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</table>
Methodology: 研究方法
Gartner = 360-degree Insight- Technology Insight

Dataquest Insight: A Quick Test Reveals Whether You Are Marketing-Oriented
Dataquest Insight: Applied Materials' Solar Strategy
Dataquest Insight: How to Incorporate Guarantee Programs Into Your Storage Marketing Strategy
Dataquest Insight: Large-Scale Installations Drive Growth of the Thin-Film Solar Cell Industry
Dataquest Insight: List of Semiconductor Contents for Asus' Eee PC 901
Dataquest Insight: Market Share for Mobile Devices, 3Q08
Dataquest Insight: Mobile PC Segmentation and Forecast by Screen Size, Worldwide
Dataquest Insight: OSS Market Overview and Strategic Scorecard for Vendors, 2008
Dataquest Insight: Storage Vendor Strategies for Surviving in a Tough Economy
Dataquest Insight: Teardown and Semiconductor Cost Analysis of Asus' Eee PC 901
Dataquest Insight: Telecom Operators Need to Increase IT Spending Ratios to Support New Digital Services
Dataquest Insight: The Future of Residential Broadband Internet Access Speeds
Dataquest Insight: The Market Battlefield for LCD and PDP TV, Worldwide
Dataquest Insight: The Outlook for Mobile Music
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- **Server market**
  - Vendors need to be aware that, because of a downturn in the market, users may defer purchases and extend life cycles. However, vendors can be assured that purchases can be deferred for only so long. Thus, to attract end users, vendors could opt to offer virtualization as an area of opportunity for short-term ROI.

- **Virtualization Market in China**
  - Technology providers have to expand their education and training efforts beyond the Beijing, Shanghai, and Guangzhou triangle and use their channels to take the message to second-tier cities and beyond.

- **Mini-notebooks**
  - PC vendors offering mini-notebooks should reduce number of low-end mobile PC models to reduce conflicts with mini-notebooks and improve their margins.