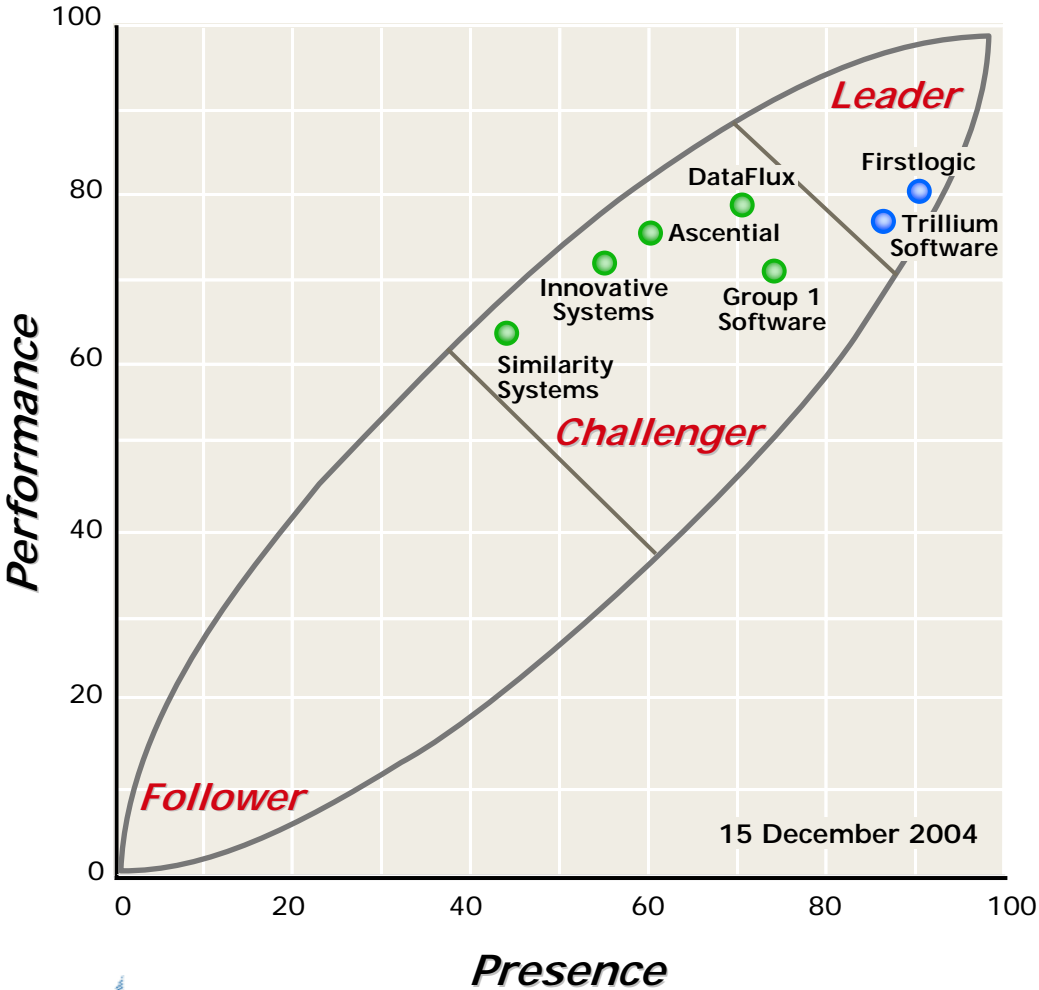




# Data Quality Tools

METAspectrum<sup>SM</sup> Evaluation



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## Market Definition

The data quality market consists of software vendors offering solutions used in the identification and remediation of problems with enterprise information assets. Specifically, data quality vendors offer various products and platforms for profiling, standardizing, matching, cleansing, and enriching data to help ensure its accuracy, completeness, and integrity. Data quality architectures must also be capable of ensuring enterprise accuracy in global/international implementations.

The following vendors/products were evaluated:

- Ascential QualityStage 7.5 and ProfileStage 7.5
- DataFlux dfPower Studio 6.2
- Firstlogic IQ8 Integration Studio
- Group I Software DataSight 3.7
- Innovative Systems i/Lytics 1.9
- Similarity Systems Athanor 2.8
- Trillium Software System and Discovery 4

## Market Forecast

We expect the data quality market to expand 20%-30% annually through 2007, with services growing at a commensurate pace. Although the market is crowded, there is room for growth and new entries. Some vendors are still determining viable market strategies to take advantage of recent technological trends (e.g., data profiling, Web services architectures, compliance support), which could also reshape the market in the years ahead. New entrants to the market will find it crowded with established vendors and solutions, many of which already boast impressive customer bases. Without long-term vision and substantial backing, it will be difficult for new players to develop solutions from scratch that are capable of competing with current-generation technology. Existing vendors may find it attractive to partner with established data integration vendors. However, leading data quality vendors will continue to expand technology and functionality alongside emerging data integration and analysis technologies.

## Key Findings

The data quality market is primarily composed of medium-sized software vendors that are exclusively dedicated to data quality and/or data integration technologies. In addition, there are a few smaller, up-and-coming players that choose to focus on specialty markets or technologies in light of their more modest market share. Most vendors evaluated in this METASpectrum, however, offer comprehensive data quality functionality in the standard technology areas: data cleansing, correction, profiling, matching, enrichment, analysis, and standardization. Recent market trends include the adoption, development, or integration of new data profiling solutions (e.g., Trillium Software, Innovative Systems); the implementation of new data quality product architectures (e.g., Firstlogic, Group I); incorporated or planned support of Web services architectures; and expanded support for compliance and non-name/address data. International features and global data quality support have become key considerations in the market.

Market presence criteria are important factors in the vendor selection process, since not all vendors possess the same vision or marketing strategy. In many cases, partner programs are required to assist in implementation and are key in driving international revenues. Business drivers vary with history and experience, as some vendors have deep roots in data cleansing (e.g., Innovative Systems) while others are still learning how to distinguish their solutions from those of competitors with larger market shares (e.g., Firstlogic, Trillium). Performance criteria are heavily weighted toward technology and product functionality, though potential buyers should also pay close attention to services/support, execution (in keeping with market trends and customer demands), and financial viability.

## Leaders

Leaders in this market have mature products that are based on proven technology and excel in nearly all aspects of data quality functionality. Moreover, leaders in the data quality space have large market shares relative to other players in the market. In some cases, technical capabilities and overall functionality are not overwhelmingly superior to those of challenging vendors, though currently only Firstlogic and Trillium excel in both presence and performance. Leaders are also characterized by industry leadership and awareness, geographic coverage and international support, technological investments, and commitment to quality implementation and support services.

## Challengers

Challengers in this market come in different varieties, and some are close to breaking into the leader category. The gap between leaders and challengers is significant but not insurmountable. For example, DataFlux and Ascential are close in terms of technology and product functionality, but they have not yet gained the market share necessary to be classified as leaders. Group I has the market share to rival the leaders and is beginning to gain technologically. All challengers are committed to data quality (and/or data integration) technologies and offer functionally sufficient data quality solutions. In some cases, challengers present unique or highly differentiated solutions that are not always addressed by the leaders (e.g., advanced compliance support, international features). Challengers do not yet have the resources or customer bases to drive market share or dominate other areas of presence and performance criteria.

## Followers

No vendors that can accurately be described as followers were evaluated in this METAspectrum. Instead, the focus was on evaluating the established market leaders, their most consistent competitors, and emerging vendors gaining success in the market. This is not an exhaustive list of software providers in the data quality market. Lesser challengers and followers do exist, but there is little value in comparing them to the established performers at this time.

## Bottom Line

Data quality vendors continue to intersect with other, related technology markets (data integration and ETL, compliance, business applications, e-commerce, etc.) without being absorbed into them. Rather, leading data quality solutions mature independently, improving integration with other markets as technologies develop and market trends evolve. Potential buyers should not become fixated on cleansing performance or accuracy as much as other key capabilities, such as data enrichment, data profiling, compliance, non-name/address logic, international data quality support, and long-term viability.

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**Business Impact:** Accurate information should be considered a key enterprise asset, and data quality solutions are a means to ensure the value of that asset, in addition to reducing business risk and identifying business opportunities with confirmed information.