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Tech Horizons: Evaluating Gomez's Web Experience Management Services

by Jean-Pierre Garbani
for Vendor Strategy Professionals



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It Offers Management On Demand For Web 2.0 Applications

by **Jean-Pierre Garbani**

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EXECUTIVE SUMMARY

Around 10 years ago, in the early stages of eCommerce, a number of Web monitoring solutions appeared on the market; they focused on the ability to play back a script that described user actions when interfacing with a Web application. The original driver behind the proliferation of external Web monitoring services was the belief that client loyalty was a function of site performance. Today, in the age of Web 2.0 and social networks, this fundamental driver is still present, but the Web technology and management requirements have evolved considerably: We are now at a stage where we need to assess the overall end user experience and correlate it to revenues. As a result, Web management services seem to have moved away from products based on passive agents and appliances, as Gomez's announcement of a software-as-a-service (SaaS) solution shows. This evolution in Web management services raises the question of whether SaaS solutions can match the appeal of internal resources and licensed products. Our evaluation of Gomez's ExperienceFirst solution suggests that they can.

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NOTES & RESOURCES

Forrester interviewed Gomez for this document.

Related Research Documents

["Tech Horizons: Sizing The Emerging Market For IT Process Automation Software"](#)
November 19, 2007

["The IT End User Experience Monitoring Software Market"](#)
June 8, 2007

["How To Predict Which IT Innovations Will Succeed"](#)
April 12, 2005

TECH HORIZONS: EVALUATING EMERGING TECHNOLOGIES

Vendor strategy professionals are looking for the next step in broadening and expanding their markets; enterprise growth is not an option but a necessity. However, engaging an enterprise in a new technology direction presents a risk. Forrester has defined four major criteria that signal the capability of a technology to be widely adopted by the market.¹ Based on these criteria, Forrester has developed a series of questions aimed at better understanding the fundamental technical and economic parameters of a new solution (see Figure 1). These questions help provide answers to the criteria for market adoption and also look at the viability of the innovators and vendors that are bringing this new solution to market. They aim to:

- **Better define the potential market.** Based on a market matrix using the size of the enterprise and the activity in which potential clients are engaged, these questions define the “filter” that we will apply to broadly define the target market. Hypotheses as to how many of the target enterprises will eventually adopt the technology, as well as the technology’s “sell-by date” — the time at which this new technology will itself be obsolete or transformed — help us further refine the potential market.
- **Explore Forrester’s adoption criteria.** In these questions, we examine the process that the technology will improve, its criticality in the enterprise, and the technical and economic advantages that an enterprise will gain from using this process improvement. We then look at the implementation factors, vested interests, and implementation speed.
- **Look at the enterprises bringing this technology to market.** Adopting a critical process improvement is only viable if the enterprise that develops and supports it is viable. Looking at who the innovators are, their experience, and their funding is an indicator not of the value of the technology but of the ability of the vendor to educate the market so that it knows and adopts the new process.

Based on its answers to this questionnaire, we conducted an evaluation of Gomez’s new solution for the management of Web-based applications. We have split this evaluation into two parts: The first rates the “heat factor” of the new technology, and the second comments on Gomez’s responses to our questions. We rated Gomez’s responses on a scale from 1 to 5, according to the value we think ExperienceFirst provides for each criterion: 1, poor; 2, improvement needed; 3, average; 4, excellent; and 5, outstanding value. We combined these ratings to determine the company’s “heat factor” in each category: the potential market that the product addresses; the likelihood of the product’s adoption, based on its technical and economic advantages; the obstacles to adoption; and finally, the ability of the company to execute in the potential market. We show these scores on a thermometer that provides, at a glance, the overall value of the company’s proposition — from cold to on fire.

Figure 1 Innovation Evaluation Questionnaire

Category	Criteria
A: Market factors	How critical is the process that this innovation will improve or change?
	How does it map to vertical markets (matrix columns)?
	How does it map to the enterprise size (matrix rows)?
	How does it map to market matrices per geography?
	What is the potential market size per year?
B: Adoption factors	What established process is improved or changed, and how is the process changed or improved?
	What is the typical resource consumption for the original process, and how does the new product improve the resource consumption?
	What are the technical and economic gains provided by the new product?
	Is the pricing plan in line with market expectations and absorption capabilities?
	How long will it take to reach mainstream adoption?
C: Implementation factors	What are the existing technologies, products, or skills that will no longer be necessary in case of adoption?
	What are the complementary technologies, products, or skills that will be needed for implementation?
	What are the other obstacles to implementation, and what is the cost of removing these obstacles?
	What resources are needed for implementation?
	What is the time scale for implementation?
	How long will it take to see the full value of the new process? How big is the value?
D: Company factors	How experienced is the management team?
	How well funded is the company?
	How big is the estimated monthly run rate?
	How good is the geographical coverage and partnership/channel structure?
	Is the sales and go-to-market strategy consistent?
	Is the sales and revenue plan realistic?
	How good is the marketing collateral?
	Is the USP clearly communicated?
	How many people does the company employ?
	Are there referenceable customers?

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Source: Forrester Research, Inc.

MANAGING THE CUSTOMER EXPERIENCE

The initial focus for customers' experience of Web applications was on availability and response time. In this initial stage, many customers were still using dial-up, only a few had had the opportunity to install high-speed links, and HTML 1.0 reigned supreme. There was a widely held belief that an 8-second response time was critical to customer retention.

Ten years later, we are using another breed of the HTML protocol, content is coming from diverse sources and is assembled at the client browser level, and advertising is fuelling Web applications. As the technology has become more sophisticated, so have the buyers and sellers. Managing the customer experience is now widely recognized as critical, but it isn't limited to availability and speed. Accuracy of content and Web site usability are increasingly seen as being as important as these initial parameters.

The Web Experience Management Market And Choices

Technically, managing the Web customer experience has to overcome a major hurdle: As customers are independent from the application provider, firms can't theoretically install an agent on the customer's machine to collect basic information. Vendors offer several families of solutions to enterprises concerned about the quality of the customer experience, and there was originally a clear division between collecting real end user data and collecting data from end user emulation. Solutions fell into three categories:

- **Real end user data collection via appliance-based passive agents.**² Collecting data from the network itself from the server side appears to be a way to resolve the real user issue. It offers a wealth of data about real user behavior and performances, but it requires IT operations to actually deploy and manage the solution.
- **Real end user data collection via a transient Java-based agent.**³ "Instrumenting" a Web page with a small Java-based agent that collects end user data is also a solution. This has broadened the debate over collecting data from the network and collecting data that includes a user workstation dimension.
- **Data collection from end user emulation in multiple geographies.** This has been the main staple of Web experience management services. It provides great value in understanding service levels and the influence of location on performance. It is also the only solution that provides true availability data. The immense advantage, especially from a purely business standpoint, is that it does not require any enterprises resources to deploy it; it also offers a very attractive subscription model.

This original, technology-based classification is, however, slowly giving way to one that is based on how the Web experience management service provides business value. The evolution of traditional Web experience management services into platforms like Gomez's ExperienceFirst is certainly giving us a different perspective on the choice — one that pits internal IT operation deployments against software-as-a-service (SaaS) solutions.

The end result is that the market for end user experience management — which was clearly split along technology lines between Web experience services and end user experience management

products — is now closer to being a global market. It still retains some technology differentiation but in terms of value to the business, it is moving closer to a competition between different sales models: licensed products verses SaaS.

Forrester estimates today's market to be worth about \$450 million, split equally between licensed products and services. The growth rate, however, is staggering: Forrester forecasts that this market could reach \$1.3 billion globally in 2013.⁴

Gomez's On-Demand Web Experience Management Solution

The platform that Gomez has built covers a broad range of requirements for a quality Web-based application (see Figure 2).

- **It provides broad geographic coverage.** Gomez bases this coverage on about a hundred geographically dispersed locations. This provides visibility into the “network” part of the end user experience and uses active agents to provide information on the behavior of the “transport” part. A group of 40,000 end points and “private peers,” also using active agents, provide information about the “last mile” and the differences between end user access technologies.
- **It uses these resources to “benchmark” the customer experience.** Based on this network, realistic load tests and performance measurements provide information about the quality and scalability of the architecture.
- **Virtual test beds ensure that the application is delivered on all platforms.** Gomez has built a virtual test bed that combines platforms, operating systems, browsers, and screen resolutions to actually “see” how the app behaves on more than 450 combinations of these user parameters.
- **Actual end user experience is also available.** Pages that include a “marker” can provide information about the real end user experience at the user-device level.
- **Web-based dashboards finally regroup all this information.** Dashboards are available for testing and monitoring. The testing dashboard provides data on locations, test profiles, and test descriptions. The Business Pulse XF dashboard provides all business-relevant information on a single pane of glass and links business data to performance data.

Figure 2 Gomez’s ExperienceFirst Platform Overview

	Synthetic transaction			Real
	Network	Last mile	Virtual test bed	End user
Reality view Does the Web site look right for all customers?			●	
Reality check Does the Web site function correctly across all customer platforms?			●	
Reality load Will all users have a quality customer experience under load?	●	●		
Active monitoring Is my Web site working right now, everywhere my customers are?	●	●		
Actual experience What are real customers actually seeing?				●

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Source: Forrester Research, Inc.

GOMEZ’S EXPERIENCEFIRST SOLUTION EVALUATION

The unique value proposition of Gomez’s ExperienceFirst is the combination of advanced technology, a suite of solutions that covers the entire life cycle of a Web-based application, a flexible “à la carte” subscription model, and a set of management dashboards targeted at management users from developers to business owners.

Gomez’s competition comes from another important player, Keynote, and from a myriad of small operators that are often limited to a single country or region: Searching the Net for “Web monitoring services” yields a very large number of qualified service providers. However, most of these vendors are still using relatively outdated technology or covering only part of the application life cycle. What makes Gomez the market leader today is the value of the parts as well as the sum of the parts. For example, Gomez’s solution resolves the debate between active agents and passive agents by using both types of agent in the ExperienceFirst platform.⁵

Along with Keynote, Gomez is also one of the rare vendors to provide complete geographic coverage in terms of both testing location and sales representation. Where Gomez again differentiates itself from the competition is in recruiting real users to conduct its performance testing and monitoring; they complement static workstations co-located in data centers instead of using only the latter option.

Gomez's ExperienceFirst Solution Is On Fire

Our overall evaluation of Gomez's ExperienceFirst solution placed it in the "on fire" category; it is definitely a service provider to consider (see Figure 3 and see Figure 4):

- **Market heat factor.** ExperienceFirst is a unique combination of elements that should appeal to all businesses using the Web channel. It does not, however, address all the needs of all groups within a company. ExperienceFirst works well for development and quality control, as well as business marketing and service-level management. However, it does not address all of the needs of the pure IT operations side of the house. ExperienceFirst is not a solution for alerts and incident/problem resolution: Active agents are not really usable for real-time alerts, and the passive agent is geared more toward providing statistical information than real-time alerts. Our ranking reflects these comments.
- **Adoption heat factor.** ExperienceFirst offers a clear improvement on existing processes: The validation of content on a number of platform combinations, understanding the app's behavior on different types of access and under load, the use of real users, and the three types of performance monitoring offered are of great value to the business user. Our ranking again reflects the fact that pure IT operations incident and problem management processes may require an additional type of probe to get a complete picture.
- **Implementation heat factor.** This is the part where ExperienceFirst definitely shines. It is easy to subscribe to, easy to use, flexible enough to adapt to changing requirements, and does not require installation nor the use of internal IT resources. In short, it accurately targets users who want to see value today rather than tomorrow.
- **Company heat factor.** Gomez has made spectacular progress in the past 18 months, leapfrogging Keynote to become the leader in Web experience management. The company appears to be on a solid footing, with an impressive growth rate and an eye for innovation. Our ranking reflects this.

Figure 3 ExperienceFirst's Evaluation

A: Market heat factor

Question	Comments
How critical is the process that this innovation will improve or change?	Gomez's ExperienceFirst platform of services helps customers improve the quality of the Web experience in order to increase their revenues from Web applications, reduce their operating costs, and extend their brand reputations. According to Forrester, in 2008, 84% of companies plan on improving Web site usability and 80% plan on improving the enjoyability of online experiences. Gomez addresses these challenges across the entire Web application life cycle by enabling customers to test their Web applications while in development and to monitor them after deployment.
How does it map to vertical markets (matrix rows)?	At March 31, 2008, Gomez had more than 2,000 customers worldwide across a wide range of industries, including communications, media, financial services, retail, social media, technology, and travel and hospitality. Customers include 13 of the 20 companies with the most-visited US Web sites in March 2008, as reported by comScore. Additionally, Gomez provides benchmarking information about the Web experience of similar applications of leading companies in selected industries, including airlines, banking, brokerage, credit cards, hotels, media, and retail.
How does it map to the enterprise size (matrix columns)?	Customers are companies that use the Internet to: conduct commerce; convey and receive content; and communicate with customers, partners, employees, and vendors. As the Web environment becomes more complex and Web applications become increasingly significant, companies' requirements for Web application experience management services are evolving. As of March 31, 2008, Gomez had more than 2,000 customers worldwide: 900 of these are enterprises, the remainder are nonenterprise customers. Gomez delivers services entirely through an on-demand, hosted model, which makes it quick, easy, and economical for customers of all sizes to deploy and use their services.
How does it map to market matrices per geography?	As of March 31, 2008, 84% of Gomez's revenues come from the US and 16% from international markets.
What is the potential market size per year?	According to Forrester, more than \$2.5 billion is spent annually on developing, testing, and monitoring "Web experience."

B: Adoption heat factor

Question	Comments
What established process is improved or changed, and how is the process changed or improved?	When business activities are conducted on the Web, the quality of the Web experience becomes critical to the success of a company's relationships with its customers and other constituencies. The quality of a user's experience is driven by a Web application's performance — its functionality, availability, speed, consistency, and ease of use. A user's unsatisfactory experience with a company's Web application can lead to lost revenues, increased operating costs, and diminished brand reputation for the company. The growing complexity of Web applications and the proliferation of access alternatives make the testing and monitoring of the applications more challenging. Traditional tools for testing and monitoring Web applications within a corporate firewall are unable to address the challenges of today's Web applications. Gomez's ExperienceFirst platform enables the testing of today's complex Web application designs before deployment and the monitoring of applications after deployment, providing a realistic representation of what users experience, regardless of their browser, operating system, device, location, or connection type. Gomez's ExperienceFirst platform is quick, easy, and economical to deploy and use, allowing a company to keep pace with the rapidly changing Web environment.

Figure 3 ExperienceFirst's Evaluation (Cont.)

B: Adoption heat factor

Question	Comments
What is the typical resource consumption for the original process, and how does the new product improve the resource consumption?	Building and maintaining Web applications consumes time and resources; it relies heavily on personnel to identify problems that degrade the Web experience. (Aberdeen Group recently reported that 58% of the organizations it surveyed are unsatisfied with the performance of applications that they currently use.) Gomez's ExperienceFirst platform is a comprehensive set of integrated services that enable a customer to measure the Web experience from outside its firewall, providing a realistic representation of what a user experiences. Gomez's services help companies increase revenues, reduce operating costs, and extend brand reputations by improving the quality of user Web experiences.
What are the technical and economical gains provided by the new product?	Gomez's ExperienceFirst platform allows companies to start testing experience much earlier in the application life cycle, putting the testing as close as possible to the customer so as to: catch design and development issues early, allow developers and operations to tune application performance, and minimize risk and problems during application launches and change management procedures. For business managers, Gomez provides a way to: measure customer experience; understand how performance problems impact the business; and align designers, developers, QA teams, operations, and business management on a set of customer-based metrics focused on delivering better Web experiences for end users. For operations, QA, and development personnel, using Gomez reduces operational costs and improves productivity and communication during incident management activities. Gomez also reduces the time to identification and repair of production problems when they occur and provides a way to monitor service-level compliance across multiple third-party providers.
Is the pricing plan in line with market expectations and abortion capabilities?	Gomez provides services on an annual subscription basis, principally through tiered usage plans that contain committed testing measurement levels based on the number of Web page measurements performed. The pricing plan spans the needs and budgets of both SMBs and enterprise companies: Products can be purchased individually, with entry points for every product starting at \$4,400 per year and enterprise packages of more than \$1 million.
How long will it take to reach mainstream adoption?	Gomez's ExperienceFirst services have gained mainstream adoption across the application life cycle. Visual and functional Web application testing are currently key parts of quality assurance and user acceptance testing. External load testing is core to most application deployment and capacity planning readiness processes, and end user Web application monitoring is crucial to problem and service-level management activities for operations personnel.

C: Implementation heat factor

Question	Comments
What are the existing technologies, products, or skill that will be no longer necessary in case of adoption?	In the past, IT organizations have purchased hardware and software tools to test and monitor Web applications. Because Gomez uses an on-demand delivery model, services require no installation in customers' data centers and limited training, facilitating quick and easy deployments.

Figure 3 ExperienceFirst's Evaluation (Cont.)**C: Implementation heat factor**

Question	Comments
What are the complementary technologies, products, or skills that will be needed for implementation?	Gomez's ExperienceFirst platform of services requires no additional ancillary technologies other than a Web browser to access the service.
What are the other obstacles to implementation, and what is the cost of removing these obstacles?	N/A
What are the resources needed to implement?	As Gomez's services are offered on a self-service basis, customers can use them on their own, without consulting with it or other third parties. Gomez provides complementary online training programs via Gomez University.
What is the implementation time scale?	New customers are typically provisioned to begin using services in only a few days, and existing customers can quickly deploy add-on services. Customers benefit from upgrades quickly and efficiently, as the on-demand platform can be used to deploy new upgrades to all existing customers simultaneously.
What is the time to see full value of the new process, and how big is the value?	Value is realized quickly with Gomez's ExperienceFirst platform. Upon the initial review of the data, many customers find ways to immediately improve their Web experience. The value delivered is dependent on the value of the Web application to a specific organization. An online business that generates \$10,000 in revenues for an hour could improve its bottom line by more than \$400,000 annually by using the Gomez tool to increase its availability by 0.5%.

D: Company heat factor

Question	Comments
How experienced is the management team?	The six members of the leadership team have an average of 20 years of technology experience. All come from successful startups or public companies. The second level of senior management has between 10 and 15 years of technology experience.
How well funded is the company?	The company has increased its positive cash annually since 2005.
How big is the estimated monthly run rate?	Gomez reported revenues of \$10 million for Q1 2008 (January through March).
How good is the geographical coverage and partnership/channel structure?	Gomez, with the help of partners, has sales coverage in the US, Canada, the UK, France, Germany, Spain, Italy, Austria, Argentina, China, Japan, Australia, and South Korea.

Figure 3 ExperienceFirst's Evaluation (Cont.)

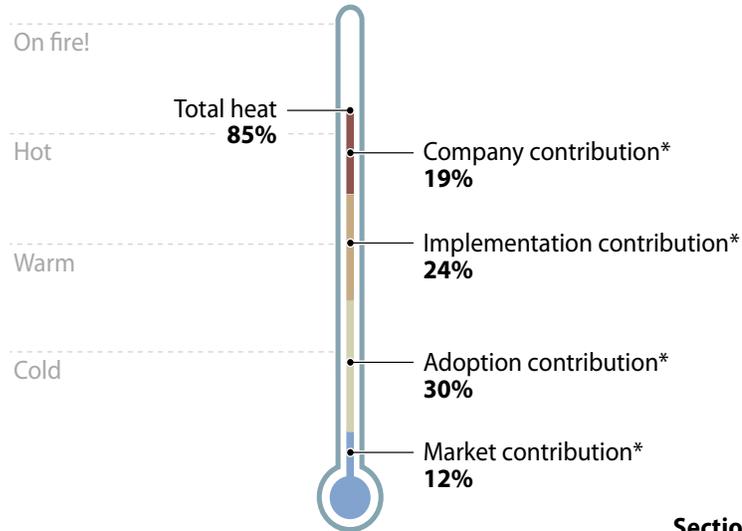
D: Company heat factor

Question	Comments
Is the sales and go-to-market strategy consistent?	The sales strategy has evolved in parallel with the go-to-market strategy. Gomez can now go to market with an inside sales force and a self-service eCommerce model, in addition to an enterprise-style direct sales team and channel partners.
Is the sales and revenue plan realistic?	Gomez has grown its revenues by more than 45% for each of the past two years.
How good is the marketing collateral?	The Gomez Web site receives 250,000 page views per month and serves as the primary marketing information channel. The Web site provides Flash-based demonstrations of its key products, as well as white papers. In addition, every product is fully detailed on data sheets for customer download. Case studies and testimonials serve to illustrate how customers are applying and deriving business value from solutions.
Is the USP clearly communicated?	In 2007, Gomez increased the number of enterprise customers from approximately 600 to 900. Thirty percent of enterprise customers as of January 1, 2007, entered into new contractual commitments. At March 31, 2008, Gomez had more than 2,000 customers worldwide.
How many people are employed by the company?	Since January 2007, Gomez has hired 100 new employees. Gomez currently employs 237 staff.
Are there referenceable customers or beta?	The Gomez Web site provides public testimonials from major clients.

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Source: Forrester Research, Inc.

Figure 4 ExperienceFirst’s Evaluation Summary



	Criteria components	Rating	Section score	Section weight
Company heat factor	Management team combined experience	4	80%	15%
	Company funding/expense run rate	4		
	Geographical coverage	4		
	Sales and marketing strategies	4		
	Marketing collateral value	4		
	Reference customers	4		
Implementation heat factor	Importance of the technologies, skills, or processes to be replaced or abandoned	5	100%	30%
	Importance and value of the complementary technologies, skills, or processes to be acquired to support the new solution	5		
	Other obstacles to overcome	5		
	Cost of implementation	5		
	Time-to-value	5		
Adoption heat factor	Value of process improvement	4	80%	30%
	Technical gains provided by the solution	4		
	Economic gains provided by the solution	4		
Market heat factor	Criticality of the process improved by the solution	3	76%	25%
	Vertical market potential	3		
	Enterprise size potential	5		
	Geography market potential	5		
	Potential market size	3		

*Weighted contribution

ENDNOTES

- ¹ Forrester has defined four fundamental criteria that a given technology must satisfy in order to see market adoption: The technology must present a technical advantage over existing technologies, it must present an economic advantage for the client of the new technology, it must satisfy the vested interests in the technology that will be replaced, and it must show these advantages in the shortest possible time frame. See the April 12, 2005, "[How To Predict Which IT Innovations Will Succeed](#)" report.
- ² Adlex (acquired by Compuware), NetQoS, BeatBox (acquired by Mercury Interactive and then HP), Coradiant, and Tealeaf Technology introduced a new approach for end user experience monitoring; this is based on bundling software and hardware in an "appliance" connected on the server side, usually through either a network "tap" or the span port of a switch. This type of connection is termed "passive" because it does not interfere with the normal operation of the network, unlike "active" ones that emulate a virtual end user. See the June 21, 2007, "[The Forrester Wave™: Appliance-Based End User Experience Monitoring](#)" report.
- ³ Symphoniq is a company that was evaluated in the Forrester Wave on desktop-based passive agent monitoring. The company specializes in end user monitoring software. Its TrueView suite solution is geared for incident and problem resolution for Web-based applications, and the passive client is consequently a client-side script executed through the user Web browser. See the September 27, 2007, "[The Forrester Wave™: Passive Agent End User Experience Monitoring, Q3 2007](#)" report.
- ⁴ In 2013, disciplines like network management, server management, storage management, event management, application management, DBMS performance management, and end user experience management monitor services and their quality. They share the same type of data and the same service models derived from the CMDB dependencies. Because IT management is service-oriented, all these disciplines provide data to the SLM/BSM and decision support dashboard functions, which group the data into service-oriented information. Analytics or pattern recognition play an important role in supporting the decision support functions that role/process-based dashboards represent. The growth in application management, SLM/BSM, end user experience management, and analytics applied to event management will compensate for the decline of network management, server management, and DBMS management. See the May 2, 2008, "[Tech Horizons: The IT Management Software Market In 2013](#)" report.
- ⁵ Active agents are relatively easy to use when emulating Web-based transactions. The main advantage of these solutions is that they provide: 1) alerts on performance deviation; 2) a consistent statistical sample of response times for a specific transaction; and 3) a measure of availability. The downside is that: 1) a "dummy" transaction is executed, which imposes a periodic cleaning; 2) there may be difficulties in defining the exact transaction to execute; and 3) intervals have to be pretty long — 5 to 15 seconds — not to impose a load on the target systems that would skew the results. Passive agents, on the other hand, may require configuration to specify the type of activity monitored, but they could potentially record all activities and do not tax the systems or corrupt the database. They would only provide good statistics through filtering, and they cannot, by their nature, measure any performance when the specific application is not used and cannot provide effective availability data. A combination of both types of agent seems to be the ideal solution. See the November 5, 2004, "[Managing Performance From The End User Perspective](#)" report.

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