



EXECUTIVE OVERVIEW

MARKET
MAP

Application and Infrastructure Performance Market Map 2018

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The application and infrastructure performance market has developed into both a big-data problem and a new opportunity. Vendors' embrace of software-as-a-service delivery models, machine learning and big-data back ends clearly demonstrates a response to the growing volume of operations data. Opportunity is emerging as providers explore ways to introduce the business world to the value in the data collected by monitoring tools.



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Key Findings

The adoption of containers and microservices presents new challenges to businesses and vendors alike, with approaches such as distributed tracing emerging as common tools for delivering insight about the performance of these constantly changing environments.

Despite the hype, machine learning is opening doors to new possibilities, including IT operations analytics 2.0, where businesses can better leverage the volume of operations (and other) data they collect in order to make smarter decisions and deliver more reliable applications.

Where once vendors debated whether they needed to add a SaaS option, it's now a foregone conclusion: 68 of the 119 vendors we researched for this report have SaaS offerings.

The march toward consolidation – primarily in terms of functions, with or without M&A activity – goes on. Infrastructure and application monitoring continue to be combined; newer trends also include harnessing logs and metrics in single tools as well as the incursion of network performance monitoring into application performance monitoring.

Executive Summary

INTRODUCTION

Big data and related topics like machine learning and SaaS delivery models are front and center in many discussions about application and infrastructure performance management today. The prevalence of complex application environments that feature containers, multiple clouds and microservices is driving these discussions, as enterprises struggle with the ensuing data overload that such environments produce. Performance monitoring tools are adapting, harnessing new technologies that can better collect, store and analyze this deluge of data.

As we did last year, we've divided the application and infrastructure performance market map in two, partly in an effort to reduce the complexity around a visualization that features many connections. We've made one notable change, which is that we're now including network performance monitoring (NPM). We've grouped it along with application performance monitoring (APM), real-user monitoring (RUM), synthetic monitoring and performance testing, since we continue to see NPM tools positioned for their utility in application monitoring. The second grouping we feature covers infrastructure monitoring, database monitoring, log management, alerting and event correlation. Neither grouping is exhaustive, but they represent the most influential players we track.

Vendors in both groups are expanding horizontally into sectors traditionally seen as separate. In addition to the intersection of NPM and APM, we're seeing a new trend toward combining logs with infrastructure monitoring, a movement that should continue to affect vendors participating in these sectors.

METHODOLOGY

451 Research Market Maps™ are designed to provide a view of the vendor landscape by major segment. The map highlights companies competing in multiple segments by connecting them through a circuit line. Identification and placement of companies into these segments is based on analysis, both published and unpublished, performed by 451 Research. This analysis includes interviews, reports and advisory work with several thousand enterprises, vendors, service providers and investors annually. 451 Research Market Maps™ are not intended to represent a comprehensive list of every vendor operating in this market. Inclusion on 451 Research Market Maps™ does not imply that a given vendor will be specifically featured in one or more 451 Research reports.

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