



EXECUTIVE OVERVIEW

MARKET
MAP

Data Management and Analytics Market Map 2018

MAY 2018

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The 2018 Data Management and Analytics Market Map illustrates the evolving market landscape, including a complete re-categorization of the analytics market to address the emergence of data science platforms and tools, as well as the addition of data science management to the data management map.



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Key Findings

In 2017, the total data market had revenue of \$89.4bn, of which \$30bn was attributable to data management and analytics, according to the latest update from 451 Research's Total Data: Platforms & Analytics Market Monitor service. The market is expected to expand at a compound annual growth rate (CAGR) of 10.3% to reach total revenue of \$146.1bn in 2022, driven in part by new approaches to artificial intelligence, including machine learning (ML) and deep learning.

The results of 451 Research's inaugural Voice of the Enterprise: Digital Pulse, Budgets and Outlook survey in 2017 show that BI/analytics, ML and big data are the top three IT priorities for 2018.

Overlap is growing between data management and analytics, with analytics and data science platform products incorporating data management and workflow management functionality in addition to core analytics/data science capabilities. This trend is likely to continue in 2018 and 2019, driven by the requirement to ensure that data science runs smoothly and effectively when operationalized in a corporate setting.

Executive Summary

INTRODUCTION

The data management and analytics sectors have evolved rapidly in recent years. New data platforms and new approaches to management and analytics are key drivers to this change; for instance, the management analytics sector emphasizes the benefits of self-service discovery and exploration, and seek to bypass the potential delays inherent in relying on IT staff as the gatekeepers of data.

To address this, we have re-divided the market to reflect the realities of analytics users and use cases today, resulting in a cleaner and more clearly defined categorization that splits the market between analytics platforms and tools, data science platforms and tools, and corporate performance management. In the data management sector, a new category covering 'data science management' reflects the growing need for products and services that enable enterprises to take the results of data science experimentation into production with associated management and monitoring.

While the market continues to evolve, the fundamentals remain the same. 'Data management and analytics' includes data management and integration technologies used to prepare data for analysis, as well as analytics tools and technologies, such as advanced analytics and machine learning (ML), used to generate insight and value from data.

This segment is a subset of the wider data platforms and analytics market, which incorporates the core data platforms – predominantly operational and analytic databases, but also distributed data processing frameworks such as Hadoop and Spark, log management, data grid/cache technologies and event/stream processing.

Data management and analytics is already a large market (with revenue of approximately \$30bn in 2017, according to 451 Research's *Total Data: Platforms and Analytics Market Monitor*), and it continues to grow, due in part to the current focus on 'pervasive intelligence' – the combination of traditional and Internet of Things (IoT) data with big-data storage and processing – as well as artificial intelligence (AI) and other advanced analytics approaches.

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.

Reports such as this one represent a holistic perspective on key emerging markets in the enterprise IT space. These markets evolve quickly, though, so 451 Research offers additional services that provide critical marketplace updates. These updated reports and perspectives are presented on a daily basis via the company's core intelligence service, 451 Research Market Insight. Forward-looking M&A analysis and perspectives on strategic acquisitions and the liquidity environment for technology companies are also updated regularly via Market Insight, which is backed by the industry-leading 451 Research M&A KnowledgeBase.

Emerging technologies and markets are covered in 451 Research channels including Cloud Transformation; Customer Experience & Commerce; Data Platforms & Analytics; Datacenters & Critical Infrastructure; Development, DevOps & IT Ops; Information Security; Internet of Things; Managed Services & Hosting; Mobile Telecom; Multi-Tenant Datacenters; Networking; Storage; Systems & Software Infrastructure; and Workforce Productivity & Compliance.

Beyond that, 451 Research has a robust set of quantitative insights covered in products such as Voice of the Enterprise, Voice of the Connected User Landscape, Voice of the Service Provider, Cloud Price Index, Market Monitor, the M&A KnowledgeBase and the Datacenter KnowledgeBase.

All of these 451 Research services, which are accessible via the web, provide critical and timely analysis specifically focused on the business of enterprise IT innovation.

For more information about 451 Research, please go to: www.451research.com.

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