MARKET SHARE

Worldwide Big Data and Analytics Software Market Shares, 2016: Public Cloud Drives Growth

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IN THIS EXCERPT

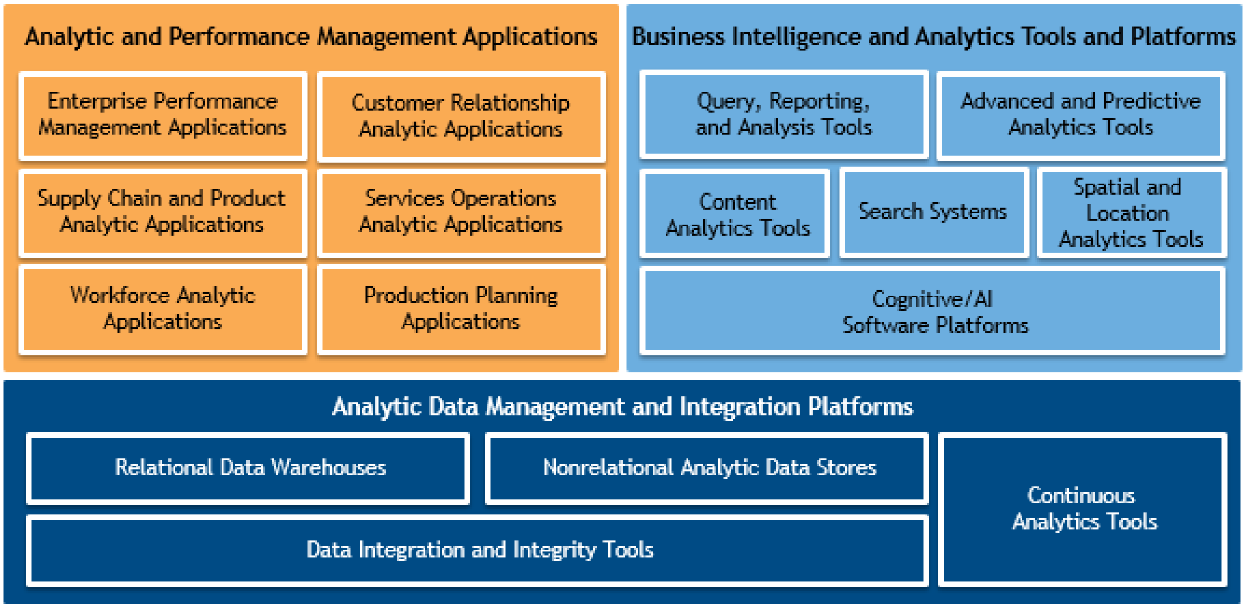
The content for this excerpt was taken directly from the IDC reports: *Worldwide Big Data and Analytics Software Market Shares, 2016: Public Cloud Drives Growth* (July 2017, IDC #US42890117); *Worldwide Business Intelligence and Analytics Tools Software Market Shares, 2016: Here Comes the Cloud* (March 2017, IDC #US42353216); *Worldwide Analytic Data Management and Integration Software Market Shares, 2016: Growth Across Market Segments* (June 2017, IDC #US42755917); *Worldwide Analytic and Performance Management Applications Software Market Shares, 2016: More Specialization and More Advanced Analytics* (June 2017, IDC #US42755917) AND *IDC's Worldwide Big Data and Analytics Software Taxonomy, 2017* (March 2017, IDC # US42353216)

DEFINITIONS

The big data and analytics (BDA) software market represents a collection of software tools and applications for data extraction, integration, governance, movement, curation, analysis, and visualization deployed to support or automate a broad range of strategic, operational, and tactical decision making. Figure 1 represents the segments of the BDA market in conceptual architecture view.

FIGURE 1

Big Data and Analytics Software Market



Source: IDC, 2017

EXECUTIVE SUMMARY

The worldwide big data and analytics (BDA) software market is made up of 16 segments as displayed in the Market Definition section and in the taxonomy figure (refer to Figure 7). This worldwide BDA software market was previously referred to by IDC as the business analytics software market. The change in the market name was instituted due to the addition of continuous analytics software, cognitive/AI software platforms, and search systems market segments. The data presented in this document maps to IDC's Semiannual Big Data and Analytics Software Tracker, which includes the same market segments by country.

The BDA software market encompasses horizontal tools and prepackaged analytic applications deployed for a broad range of decision support and decision automation use cases and includes software to support the full life cycle of data integration, integrity, analysis, visualization, and related decision support functionality.

In 2016, the worldwide BDA software market grew 8.5% in current currency terms. In constant currency, the market grew 9.8%. The impact of currency fluctuations was minimal in 2016, compared with the 2012–2014 period.

There was a wide degree of variation in 2016 revenue growth rates among the 14 market segments. The top 3 fastest-growing subsegments were nonrelational analytic data stores (58.0%); cognitive/AI software platforms, content analytics, and search systems (15.7%); and customer relationship analytic applications (12.0%). The two largest market subsegments were end-user query, reporting, and analysis and relational data warehouse management, with growth rates of 6.6% and 5.2%, respectively.

In 2016, the BDA software market continued the migration to the cloud. The on-premises portion of the overall market grew 4.0%, while public cloud services revenue grew 36.1%. The public cloud portion of the total market represented 17.5%. Note that public cloud revenue is significantly higher for the analytic and performance management applications segment than for other segments of the market.

In 2016, Oracle continued as the largest BDA software vendor with 14.3% share, followed by SAP, Microsoft, IBM, and SAS. Together, these top 5 vendors had 50% market share, down from 55% in 2014. Among the top 35 vendors (all with over $100 million in 2016 BDA software revenue), the fastest growth came from Anaplan, Hortonworks, and Amazon Web Services (AWS).

This IDC study highlights the shares of the largest vendors in the worldwide big data and analytics software for the calendar year 2016.

"There are three significant shifts happening in the BDA market that are reflected in the revenue performance of software vendors: first, the rapid growth of data management software based on nonrelational databases; second, the ongoing shift to public cloud; and third, growth in automation reflected in the high growth rate of cognitive/AI software," said Dan Vesset, group VP, Analytics and Information Management.

The following section presents a selection of market share tables from among the 16 segments of the BDA software market.

MARKET SHARE

Table 1 displays the B market share by vendor for 2014–2016.

TABLE 1

Worldwide Big Data and Analytics Software Revenue by Vendor, 2014-2016

	2014		2015			2016		
Vendor	Revenue ($M)	Share (%)	Revenue ($M)	Share (%)	2014–2015 Growth (%)	Revenue ($M)	Share (%)	2015–2016 Growth (%)
Oracle	7,015.2	16.0	6,826.3	15.1	-2.7	7,024.9	14.3	2.9
SAP	5,697.0	13.0	5,151.9	11.4	-9.6	5,437.3	11.1	5.5
Microsoft	3,748.5	8.6	4,180.6	9.2	11.5	4,688.1	9.5	12.1
IBM	4,851.2	11.1	4,544.1	10.0	-6.3	4,603.3	9.4	1.3
SAS	2,752.7	6.3	2,854.2	6.3	3.7	2,878.6	5.9	0.9

TABLE 1

Worldwide Big Data and Analytics Software Revenue by Vendor, 2014-2016

	2014		2015			2016		
Vendor	Revenue ($M)	Share (%)	Revenue ($M)	Share (%)	2014–2015 Growth (%)	Revenue ($M)	Share (%)	2015–2016 Growth (%)
Salesforce.com	613.3	1.4	743.5	1.6	21.2	891.8	1.8	19.9
Teradata	1,071.0	2.4	991.7	2.2	-7.4	889.6	1.8	-10.3
Tableau Software	399.3	0.9	630.6	1.4	57.9	792.4	1.6	25.7
Adobe	568.5	1.3	647.9	1.4	14.0	776.8	1.6	19.9
Amazon Web Services	156.1	0.4	413.0	0.9	164.5	653.2	1.3	58.2
Subtotal	26,872.8	61.4	26,983.8	59.5	0.4	28,636.0	58.3	6.1
Other	16,927.3	38.6	18,282.6	40.5	8.0	20,475.9	41.7	12.0
Total	43,800.1	100.0	45,266.4	100.0	3.3	49,111.9	100.0	8.5

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Semiannual Big Data and Analytics Software Tracker, May 2017

Table 2 displays 2014–2016 market shares for the overall business intelligence and analytics tools market.

Table 3 displays 2014–2016 market shares for the advanced and predictive analytics tools market.

TABLE 2

Worldwide Business Intelligence and Analytics Tools Software Revenue by Vendor, 2014-2016 ($M)

	Revenue			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
Microsoft	1,679.8	1,828.7	1,972.5	9.5	10.0	9.9	8.9	7.9
SAP	2,339.3	1,871.2	1,899.3	13.2	10.2	9.5	-20.0	1.5
IBM	1,642.6	1,518.8	1,603.0	9.3	8.3	8.0	-7.5	5.5

TABLE 2

Worldwide Business Intelligence and Analytics Tools Software Revenue by Vendor, 2014–2016 ($M)

	Revenue			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
SAS	1,300.1	1,378.0	1,427.1	7.3	7.5	7.1	6.0	3.6
Oracle	1,152.7	1,130.7	1,109.9	6.5	6.2	5.6	-1.9	-1.8
Tableau Software	399.3	630.6	792.4	2.3	3.4	4.0	57.9	25.7
Qlik	503.0	556.5	636.0	2.8	3.0	3.2	10.6	14.3
Palantir	483.9	589.2	592.9	2.7	3.2	3.0	21.8	0.6
Nuance Communications	481.2	489.0	488.2	2.7	2.7	2.4	1.6	-0.2
MicroStrategy	444.0	428.7	429.2	2.5	2.3	2.1	-3.4	0.1
Subtotal	10,425.9	10,421.4	10,950.5	58.8	56.8	54.8	0.0	5.1
Other	7,264.3	7,875.4	9,019.6	41.2	43.2	45.2	8.4	14.5
Total	17,690.2	18,296.8	19,970.1	100.0	100.0	100.0	3.4	9.1

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Worldwide Semiannual Big Data and Analytics Software Tracker, May 2017

TABLE 3

Worldwide Advanced and Predictive Analytics Software Revenue by Vendor, 2014–2016 ($M)

	Revenue			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
SAS	807.8	873.9	917.6	31.5	31.6	30.5	8.2	5.0
IBM	383.3	349.8	361.1	14.9	12.6	12.0	-8.7	3.2
MathWorks	280.8	300.5	321.9	11.0	10.9	10.7	7.0	7.1

TABLE 3

Worldwide Advanced and Predictive Analytics Software Revenue by Vendor, 2014–2016 ($M)

	Revenue			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
Microsoft	72.5	82.7	88.9	2.8	3.0	3.0	14.1	7.5
FICO	43.7	62.2	72.9	1.7	2.2	2.4	42.5	17.2
Alteryx	20.9	28.6	45.1	0.8	1.0	1.5	37.0	57.6
RapidMiner	6.2	20.2	28.0	0.2	0.7	0.9	227.3	38.4
Dell	22.7	25.7	27.9	0.9	0.9	0.9	13.2	8.9
SAP	23.6	24.2	26.6	0.9	0.9	0.9	2.3	9.9
Oracle	14.7	13.9	15.0	0.6	0.5	0.5	-5.7	8.2
Pitney Bowes	15.2	13.9	12.4	0.6	0.5	0.4	-9.0	-10.4
Amazon Web Services	–	3.3	10.9	–	0.1	0.4	NA	230.3
Teradata	11.1	7.0	10.2	0.4	0.3	0.3	-37.0	46.0
Ayasdi	2.5	6.2	10.1	0.1	0.2	0.3	150.0	63.3
Subtotal	1,705.0	1,812.1	1,948.8	66.5	65.5	64.7	6.3	7.5
Other	858.8	955.0	1,063.6	33.5	34.5	35.3	11.2	11.4
Total	2,563.8	2,767.2	3,012.5	100.0	100.0	100.0	7.9	8.9

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Worldwide Semiannual Big Data and Analytics Software Tracker, May 2017

Table 4 displays 2014–2016 market shares for the analytic data integration software market.

TABLE 4

Worldwide Analytic Data Integration Software Revenue by Vendor, 2014-2016

	Revenue ($M)			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
SAS	579.5	590.4	585.2	23.4	23.1	21.9	1.9	-0.9
IBM	415.2	455.0	476.3	16.8	17.8	17.8	9.6	4.7
Informatica	450.1	453.7	462.0	18.2	17.8	17.3	0.8	1.8
Microsoft	249.5	276.5	304.3	10.1	10.8	11.4	10.9	10.0
Syncsort	81.9	88.7	94.9	3.3	3.5	3.6	8.2	7.0
SAP	78.0	79.5	87.3	3.1	3.1	3.3	2.0	9.8
Oracle	77.5	74.4	73.7	3.1	2.9	2.8	-4.0	-1.0
Talend	23.6	29.6	42.8	1.0	1.2	1.6	25.7	44.3
Alteryx	17.1	23.4	39.4	0.7	0.9	1.5	36.7	68.5
Pitney Bowes	39.4	35.8	33.0	1.6	1.4	1.2	-9.2	-7.9
Information Builders	20.1	20.5	20.7	0.8	0.8	0.8	2.0	1.4
Subtotal	2,031.9	2,127.5	2,219.6	82.1	83.3	83.1	4.7	4.3
Other	444.5	426.6	450.0	17.9	16.7	16.9	-4.0	5.5
Total	2,476.3	2,554.1	2,669.6	100.0	100.0	100.0	3.1	4.5

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Worldwide Semiannual Big Data and Analytics Software Tracker, May 2017

Table 5 displays 2014-2016 market share for the overall analytic and performance management applications market.

Table 6 displays 2014-2016 market share for the customer relationship analytic applications market.

Table 7 displays 2014-2016 market share for the services operations analytic applications market.

TABLE 5

Worldwide Analytic and Performance Management Applications Software Revenue by Vendor, 2014–2016

	Revenue ($M)			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
SAP	2,467.4	2,334.2	2,485.1	18.9	17.5	17.4	-5.4	6.5
Oracle	2,106.5	2,057.7	2,177.7	16.1	15.4	15.2	-2.3	5.8
Salesforce.com	613.3	743.5	891.8	4.7	5.6	6.2	21.2	19.9
IBM	906.2	843.0	791.3	6.9	6.3	5.5	-7.0	-6.1
SAS	776.5	794.5	780.4	5.9	5.9	5.5	2.3	-1.8
Adobe	568.5	647.9	776.8	4.4	4.9	5.4	14.0	19.9
Infor	335.3	346.7	350.3	2.6	2.6	2.5	3.4	1.0
FICO	309.9	322.1	328.9	2.4	2.4	2.3	3.9	2.1
JDA Software	188.6	197.1	217.2	1.4	1.5	1.5	4.5	10.2
Webtrends	129.7	150.5	170.1	1.0	1.1	1.2	16.1	13.0
Epicor Software	142.3	147.8	152.3	1.1	1.1	1.1	3.8	3.0
Aspen Technology	124.8	142.4	147.9	1.0	1.1	1.0	14.1	3.9
Marketo	66.8	94.1	122.0	0.5	0.7	0.9	41.0	29.6
Anaplan	34.0	62.0	108.0	0.3	0.5	0.8	82.4	74.2
Unicom Systems	32.8	98.3	106.5	0.3	0.7	0.7	200.0	8.3
Subtotal	8,802.6	8,981.8	9,606.4	67.4	67.3	67.3	2.0	7.0
Other	4,263.4	4,370.7	4,678.1	32.6	32.7	32.7	2.5	7.0
Total	13,066.0	13,352.5	14,284.4	100.0	100.0	100.0	2.2	7.0

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Worldwide Semiannual Big Data and Analytics Software Tracker, May 2017

TABLE 6

Worldwide Customer Relationship Analytic Applications Software Revenue by Vendor, 2014-2016

	Revenue ($M)			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
Salesforce.com	613.3	743.5	891.8	16.1	18.1	19.4	21.2	19.9
Adobe	568.5	647.9	776.8	14.9	15.8	16.9	14.0	19.9
Oracle	630.8	614.3	734.0	16.6	15.0	16.0	-2.6	19.5
SAS	411.3	422.6	423.9	10.8	10.3	9.2	2.8	0.3
IBM	324.6	321.0	297.4	8.5	7.8	6.5	-1.1	-7.3
SAP	173.7	187.0	206.0	4.6	4.6	4.5	7.7	10.2
Webtrends	129.7	150.5	170.1	3.4	3.7	3.7	16.1	13.0
Marketo	66.8	94.1	122.0	1.8	2.3	2.7	41.0	29.6
PROS Pricing Solutions	90.3	88.5	88.0	2.4	2.2	1.9	-2.0	-0.5
Genesys Telecommunications Laboratories	48.2	58.1	65.7	1.3	1.4	1.4	20.7	13.1
Verint Systems	34.7	36.6	36.7	0.9	0.9	0.8	5.5	0.3
NICE SYSTEMS	27.7	30.0	35.8	0.7	0.7	0.8	8.3	19.3
Infor	34.9	36.1	34.6	0.9	0.9	0.8	3.2	-4.1
Comscore	25.4	26.5	26.3	0.7	0.6	0.6	4.0	-0.5
Teradata	25.0	22.4	21.0	0.7	0.5	0.5	-10.4	-6.3
Subtotal	3,204.9	3,479.1	3,930.2	84.2	84.9	85.6	8.6	13.0
Other	600.3	617.8	659.4	15.8	15.1	14.4	2.9	6.7
Total	3,805.2	4,096.9	4,589.6	100.0	100.0	100.0	7.7	12.0

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Worldwide Semiannual Big Data and Analytics Software Tracker, May 2017

TABLE 7

Worldwide Services Operations Analytic Applications Software Revenue by Vendor, 2014-2016

	Revenue ($M)			Share (%)			Growth (%)	
	2014	2015	2016	2014	2015	2016	2014–2015	2015–2016
FICO	299.0	309.6	315.6	18.2	18.5	18.2	3.6	1.9
SAS	245.2	252.1	248.0	14.9	15.0	14.3	2.8	-1.6
IBM	145.7	140.7	140.0	8.9	8.4	8.1	-3.4	-0.5
FIS	106.2	98.4	98.5	6.5	5.9	5.7	-7.3	0.1
Fiserv	62.4	65.1	68.7	3.8	3.9	4.0	4.2	5.5
SAP	50.1	46.5	48.0	3.1	2.8	2.8	-7.3	3.3
Oracle	51.0	45.4	46.3	3.1	2.7	2.7	-10.8	2.0
Misys	37.0	39.1	39.7	2.3	2.3	2.3	5.9	1.5
McKesson	29.1	27.5	27.1	1.8	1.6	1.6	-5.3	-1.7
Subtotal	1,025.5	1,024.5	1,031.9	62.4	61.1	59.6	-0.1	0.7
Other	616.9	652.1	700.3	37.6	38.9	40.4	5.7	7.4
Total	1,642.4	1,676.6	1,732.2	100.0	100.0	100.0	2.1	3.3

Note: This table does not include any mergers and acquisitions that closed after December 31, 2016.

Source: IDC's Worldwide Semiannual Big Data and Analytics Software Tracker, May 2017

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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