

REPORT REPRINT

Total Data market projected to reach \$146bn by 2022

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The Total Data market, which consists of data platforms and analytics, will grow at a compound annual growth rate of 10.3% from the end of 2017 to 2022, according to the latest market sizing and forecasting update from 451 Research.

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The Total Data market is expected to grow from \$89.4bn in revenue in 2017 to \$146.1bn in 2022, according to the latest update from 451 Research's Total Data: Data Platforms & Analytics Market Monitor service. The service presents data generated via a bottom-up analysis of 332 vendors that participate across the eight Total Data segments tracked.

THE 451 TAKE

The Total Data market is expected to grow at a compound annual growth rate (CAGR) of 10.3% to reach total revenue of \$146.1bn in 2022, according to the latest update from 451 Research's Total Data: Data Platforms & Analytics Market Monitor service. The fastest-growing subsegments illustrate the shift toward distributed data processing and advanced analytics. The greatest growth is expected to come from distributed data-processing frameworks (Apache Hadoop and Apache Spark), as well as NoSQL and NewSQL databases, followed by distributed data grid/cache, along with approaches to artificial intelligence, including machine learning and deep learning.

REPORT OVERVIEW

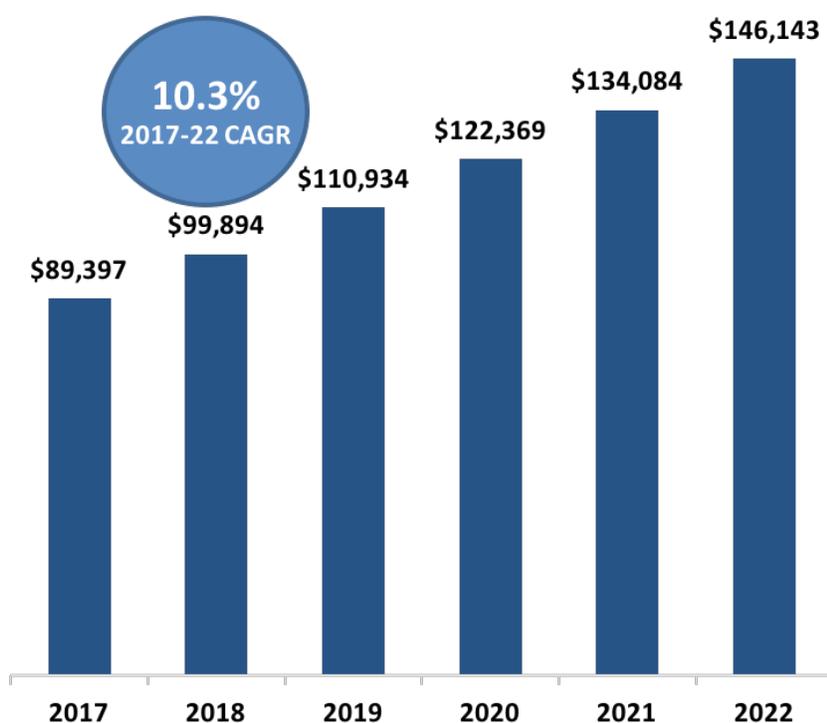
The Total Data: Data Platforms & Analytics Market Monitor service examines revenue generated by 332 vendors and segments the aggregate market into eight sectors. At the core of the Market Monitor service is a database that incorporates individual models on each of the 332 participating vendors and highlights revenue generated by the specific product or service included in the analysis. Therefore, our forecast is an aggregation of the growth trends, challenges and opportunities facing each vendor.

This pure bottom-up approach allows for a greater level of visibility into our figures and the assumptions behind our forecasts, which are backed up by recent end-user survey results from 451 Research's Voice of the Connected User Landscape and Voice of the Enterprise, and enables deep-dive analytics to be performed that go beyond topline market revenue forecasts.

For example, in 2017 we explored the potential rise of hybrid operational and analytic processing workloads, as well as the likely impact of multiple execution venues (public, private, on-premises, hosted and cloud) on database revenue.

The latest figures, providing updated market and vendor estimates through the fourth quarter of 2017, indicate that the market is expected to grow at a CAGR of 10.3% from \$89.4bn in 2017 to reach total revenue of \$146.1bn in 2022.

TOTAL DATA MARKET REVENUE (\$M)



Our Total Data: Data Platforms & Analytics Market Monitor service covers eight sectors: operational databases, analytic data platforms, reporting and analytics, data management, corporate performance management, event/stream processing, distributed data grid/cache, and search-based data platforms and analytics.

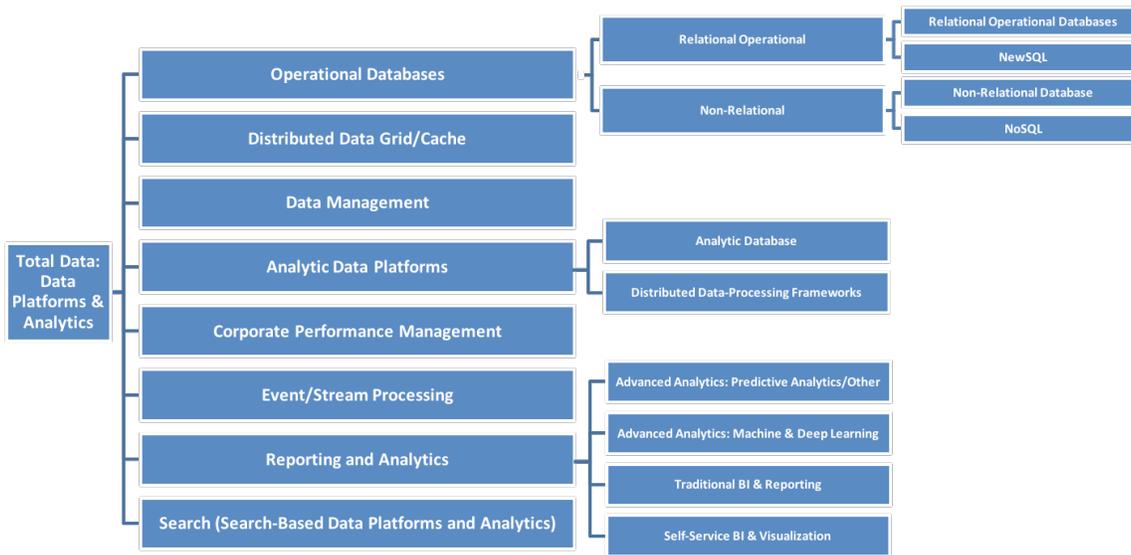
As illustrated below, our Total Data market-sizing contains several subsectors that are broken out in the overview report and examined closely in our quarterly reports published as part of the Market Monitor service.

The analytic data platforms sector is subsegmented into analytic databases and distributed data-processing frameworks, while operational database subsegments include relational databases (itself segmented into traditional relational and NewSQL) and non-relational databases (both traditional non-relational and NoSQL).

Additionally, the reporting and analytics sector is made up of four subsegments: Traditional BI & Reporting, Self-Service BI & Visualization, Advanced Analytics: Machine & Deep Learning, and Advanced Analytics: Predictive Analytics/Other.

Specifically, our Total Data: Data Platforms & Analytics Market Monitor service tracks 33 relational operational database participants, 52 non-relational database vendors, 57 in the analytic data platforms market, 125 in the reporting and analytics segment, 85 data management providers, 17 corporate performance management firms, 23 event/stream-processing vendors, 16 distributed data grid/cache providers, and 27 search-based data platform and analytic vendors.

TOTAL DATA TAXONOMY



SUBSECTOR HIGHLIGHTS

Some high-level takeaways from our most recent Total Data: Data Platforms & Analytics update include:

- The 33 relational operational database vendors generated the largest proportion of total market revenue, followed by the 125 reporting and analytics providers and the 57 participants in the analytic data platforms segments. These three segments account for the majority of total market revenue.
- While significantly smaller than the big three highlighted above, data management represents the fourth-largest Total Data market segment in terms of revenue, and the second-largest in terms of participants, with 85.
- In terms of segment growth, the latest update indicates a three-way tie between NoSQL and NewSQL databases and distributed data-processing frameworks (all with a 29% CAGR from 2017-2022).
- Other high-growth subsectors include Distributed Data Grid/Cache (26.5%), Advanced Analytics: Machine & Deep Learning (24%), Search-Based Data Platforms and Analytics (23.2%), and Event/Stream Processing (19.7%).
- The greatest value creation is expected to come from the combined Reporting and Analytics sector, however, which will generate \$15.1bn in new revenue between 2017 and 2022.
- In addition to the topline market and subsector revenue, our Total Data: Data Platforms & Analytics Market Monitor service examines market revenue generation by geographic segment. Unsurprisingly, North America accounts for the vast majority of revenue, followed by EMEA, APAC and LATAM. However, LATAM is showing the fastest growth, followed by APAC and EMEA.
- As highlighted above, given the bottom-up nature of our market analysis, we can provide granular detail at the vendor level. For example, market revenue generated by publicly traded firms accounted for 84% of the total in 2017, with private firms representing the remaining 16%. In terms of the number of vendors, however, public companies represent just 7% of the total.
- The market revenue distribution shows that the vast majority of vendors are still below the \$25m threshold (74% of total). After examining the market revenue segmented by the 332 providers included, we have determined that only nine vendors accounted for more than \$1bn each in the aggregate revenue for 2017, with 85% of all vendors generating less than \$100m in annual revenue.

451 Research’s Data Platforms and Analytics practice contributes to our Total Data: Data Platforms & Analytics Market Monitor service, and will be using the data to contribute to Market Insight and Technology & Business Insight reports. Subscribers of the Total Data Market Monitor service may request a custom cut of any data provided in this report, or can schedule a briefing for further insight.