

Market for Analytics och Business Intelligence-platforms (ABI-platforms) – part 2

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Main source

- This presentation is based on:
 - Howson, C., et al. (2019) Gartner Group's report "Magic Quadrant for Analytics and Business Intelligence Platforms"
 - Kronz, A., et al. (2022) Gartner Group's report "Magic Quadrant for Analytics and Business Intelligence Platforms"
 - Schlegel, K., et al. (2023) Gartner Group's report "Magic Quadrant for Analytics and Business Intelligence Platforms"
 - Schlegel, K., et al. (2024) Gartner Group's report "Magic Quadrant for Analytics and Business Intelligence Platforms"



Magic Quadrant



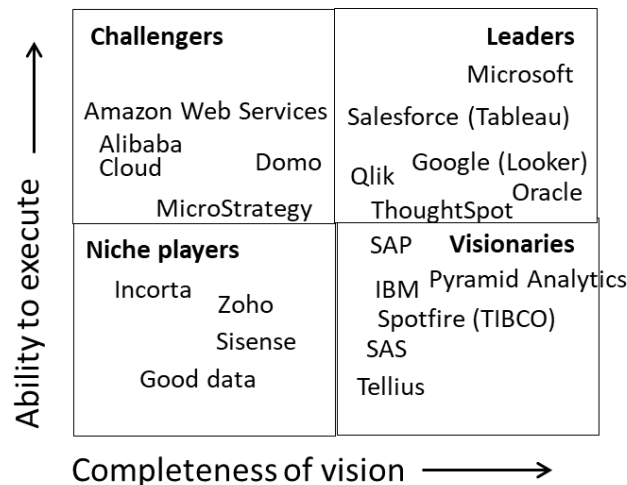
Magic Quadrant

Gartner's Sources:

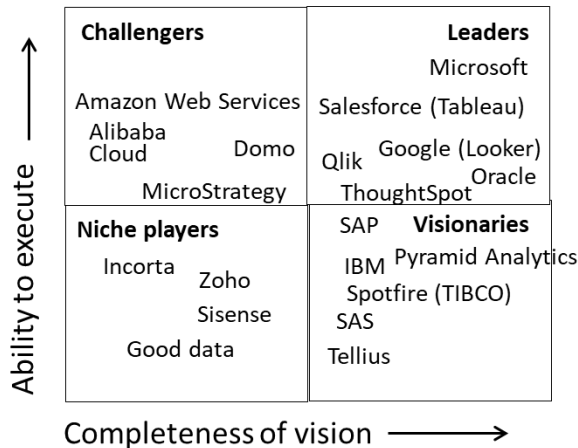
- Gartner analysts' evaluations
- Customer feedback and perceptions
- Gartner peer insights (users and professionals) data
- Vendor business questionnaires responses
- Vendor strategy and roadmap briefings
- Vendor responses on 12 critical capabilities
- Product demonstration videos
- External data on market momentum



- Ability to execute
- Completeness of vision

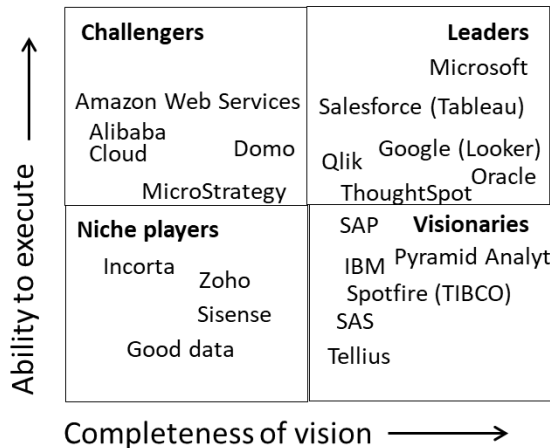


Magic Quadrant



- **Ability to execute** – vendors ability deliver on its vision through product performance, market responsiveness, financial strength, and operational efficiency.
- The criteria used for measuring ABI vendors:
 - **Product or Service** – Quality, functionality, and competitiveness of offerings.
 - **Overall Viability** – Financial stability and long-term sustainability.
 - **Sales Execution/Pricing** – Effectiveness in acquiring customers and pricing competitiveness.
 - **Market Responsiveness/Record** – Ability to adapt to market changes and demands.
 - **Marketing Execution** – Success in promoting and positioning products effectively.
 - **Customer Experience** – Satisfaction, support, and overall user engagement.
 - **Operations** – Efficiency in business processes and day-to-day execution.

Magic Quadrant

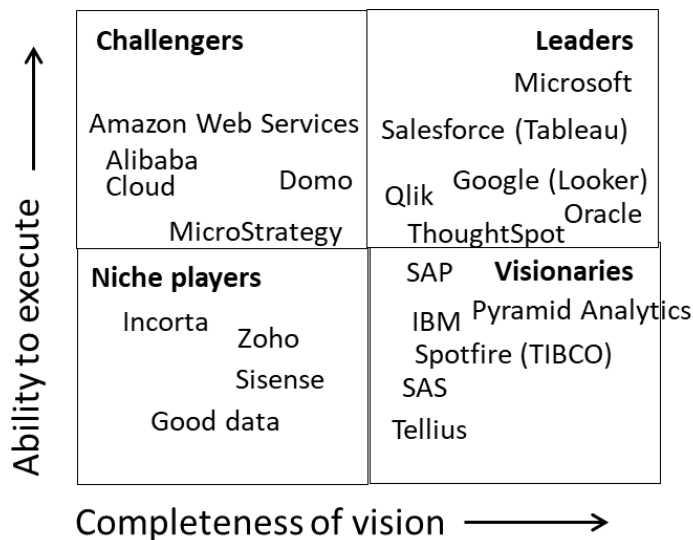


- **Completeness of vision** – ABI vendors ability to articulate a clear, forward-thinking, and innovative strategy that aligns with market trends and future demands.

• The criteria used for measuring ABI vendors:

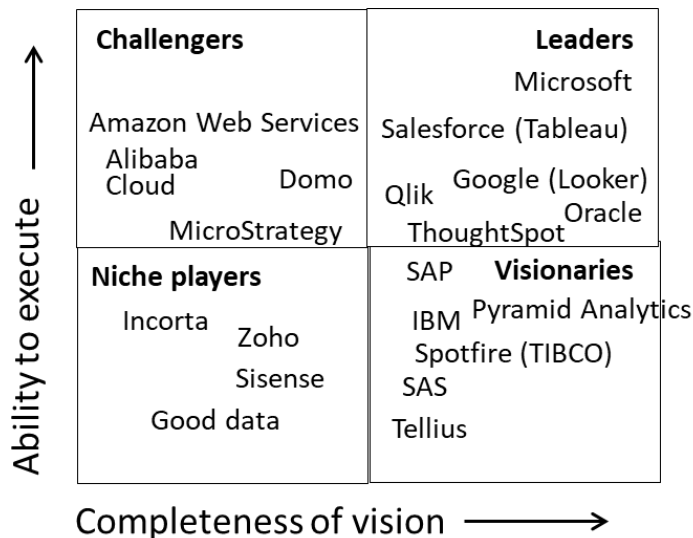
- **Market Understanding** – Ability to anticipate customer needs and trends.
- **Marketing Strategy** – Clear messaging, positioning, and communication to target markets.
- **Sales Strategy** – Effective go-to-market plan and sales channels.
- **Offering (Product) Strategy** – Innovation and alignment of product with market demands.
- **Business Model** – Viability and adaptability of the company's revenue approach.
- **Vertical/Industry Strategy** – Tailored solutions for specific industries and sectors.
- **Innovation** – Commitment to developing new and disruptive technologies.
- **Geographic Strategy** – Expansion and support across different global markets

Magic Quadrant



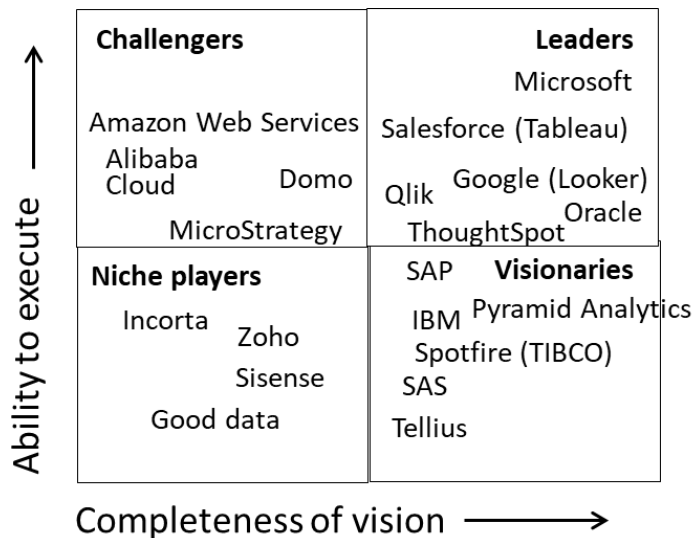
- Challengers** – are well-positioned in the market, often with strong financial backing and a broad customer base. They provide reliable solutions with robust support and implementation capabilities. However, they might lack a forward-thinking approach and focus more on refining existing solutions rather than developing new ones.

Magic Quadrant



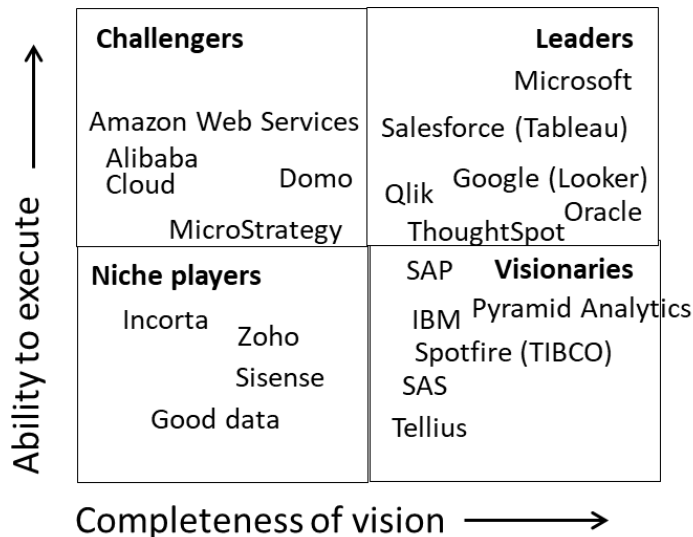
- **Visionaries** – have a strong and differentiated vision for delivering a modern ABI platform. They excel in specific areas, such as advanced analytics, AI integration, or unique visualization capabilities, but may struggle with large-scale execution, customer support, and market reach compared to Leaders and Challengers.

Magic Quadrant



- **Leaders** – have a solid understanding of the market's needs and deliver comprehensive solutions with strong execution capabilities, customer satisfaction, and a clear vision for the future.

Magic Quadrant



- **Nisch players** – focus on a specific domain, industry, or use case but may lack the broader capabilities or market reach of the larger vendors.

Magic Quadrant 2019

<p>Challengers</p> <p>MicroStrategy</p>	<p>Leaders</p> <p>Microsoft</p> <p>Tableau</p> <p>Qlik</p> <p>ThoughtSpot</p>
<p>Niche players</p> <p>Looker</p> <p>Domo</p> <p>GoodData</p> <p>Yellowfin</p> <p>Oracle</p> <p>Pyramid Analytics</p> <p>IBM</p>	<p>Visionaries</p> <p>Sisense</p> <p>Salesforce</p> <p>TIBCO</p> <p>SAS</p> <p>SAP</p>

2019

[Howson et al., 2019]



The market 2019 according to Gartner

- **Microsoft's major BI product is Power BI.** Power BI is an easy-to-use product with high levels of customer satisfaction. Power BI is low priced and have a strong global adoption.
- **Tableau's major BI product is named Tableau.** The product is popular due to its easy-to-use visual exploration and data manipulation. Tableau has a large active user community that acts like fans.
- **Qlik's major product is QlikSense,** built on Qlik Analytics Platform. However, Qlik's original product, **QlikView,** still have a large customer base. Qlik have a large and active user community.

[Howson et al., 2019]



Magic Quadrant 2019 and 2022

<p>Challengers</p> <p>MicroStrategy</p>	<p>Leaders</p> <p>Microsoft</p> <p>Tableau</p> <p>Qlik</p> <p>ThoughtSpot</p>
<p>Niche players</p> <p>Looker</p> <p>Domo</p> <p>GoodData</p> <p>Yellowfin</p> <p>Oracle</p> <p>IBM</p> <p>Pyramid Analytics</p>	<p>Visionaries</p> <p>Sisense</p> <p>Salesforce</p> <p>TIBCO</p> <p>SAS</p> <p>SAP</p>

2019

[Howson et al., 2019]

<p>Challengers</p> <p>Google (Looker)</p> <p>Domo</p>	<p>Leaders</p> <p>Microsoft</p> <p>Salesforce (Tableau)</p> <p>Qlik</p>
<p>Niche players</p> <p>MicroStrategy</p> <p>Alibaba Cloud</p> <p>Pyramid Analytics</p> <p>Incorta</p> <p>Amazon Web Services</p> <p>Zoho</p>	<p>Visionaries</p> <p>ThoughtSpot</p> <p>TIBCO</p> <p>Sisense</p> <p>SAP</p> <p>Oracle</p> <p>IBM</p> <p>SAS</p> <p>Yellowfin</p> <p>Tellius</p>

2022

[Kronz et al., 2022]



The market 2022 according to Gartner

- **Microsoft** is still the market leader with its Power BI tool, which has now been aligned with MS Office 365 and Teams
- **The CRM giant Salesforce has acquired Tableau** and have started to integrate their solutions. Salesforce has also acquired Narrative Science, a data storytelling vendor. The result: Salesforce (Tableau) has now become a market leader as well.
- **Qlik** is still a leader

[Kronz et al., 2022]



The market 2022 according to Gartner

- **Google's entrance.** Google acquired Looker and has made an "impressive entrance" into the ABI market, according to the Gartner report. The Looker ABI platform has been integrated into the Google Cloud Platform ecosystem
- **Domo.** Domo has gone from a nisch player to a challenger by, for example, made use of the low-code/no-code solution
- **Oracle and SAP** have momentum.



Magic Quadrant 2022 and 2023

<p>Challengers</p> <p>Google (Looker)</p> <p>Domo</p>	<p>Leaders</p> <p>Microsoft</p> <p>Salesforce (Tableau)</p> <p>Qlik</p>
<p>Niche players</p> <p>MicroStrategy</p> <p>Alibaba Amazon</p> <p>Cloud Web</p> <p>Pyramid Services</p> <p>Analytics Zoho</p> <p>Incorta</p>	<p>Visionaries</p> <p>ThoughtSpot</p> <p>TIBCO Sisense</p> <p>SAP Oracle</p> <p>IBM SAS</p> <p>Yellowfin</p> <p>Tellius</p>

2022

[Kronz et al., 2023]

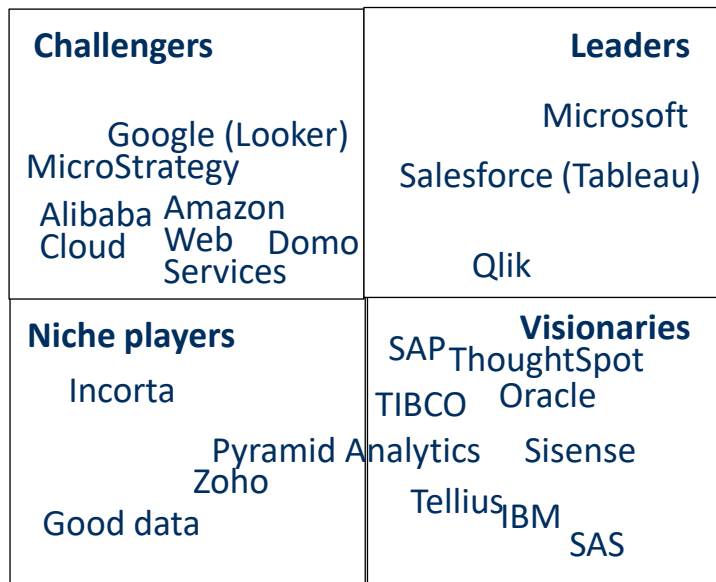
<p>Challengers</p> <p>Google (Looker)</p> <p>MicroStrategy</p> <p>Alibaba Amazon</p> <p>Cloud Web Domo</p> <p>Services</p>	<p>Leaders</p> <p>Microsoft</p> <p>Salesforce (Tableau)</p> <p>Qlik</p>
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2023

[Schlegel et al., 2024]

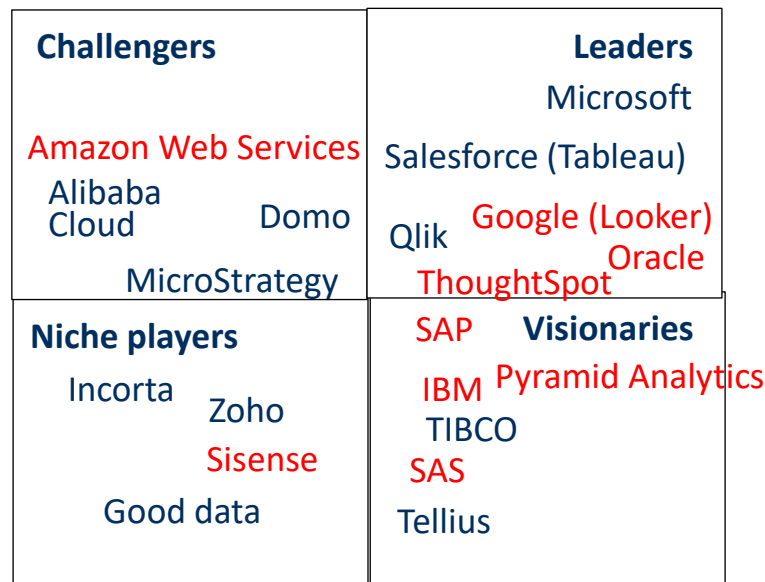


Magic Quadrant 2023 and 2024



2023

[Schlegel et al., 2023]



2024

[Schlegel et al., 2024]



The market 2024 according to Gartner

- **Microsofts product Power BI continues to dominate the market**, and sales is still growing strongly. A major reason for that is the bundling of Power BI with Microsofts 365, which is provided with a reduced price. Microsoft has also integrate Power BI with Microsoft Teams.

[Schlegel et al., 2024]



Trends 2024

- **Major cloud ERP and CRM providers also provide ABI solutions.**

There is a risk of lock-in using these cloud solutions. However, several cloud service providers have open up their software stacks so that customer organizations can run applications across multiple cloud offerings (multicloud):

- Microsoft – Offers Power BI as part of its ecosystem, alongside ERP (Dynamics 365) and CRM solutions.
- Salesforce – Provides Tableau for analytics along with its CRM solutions.
- Oracle – Offers Oracle Analytics Cloud, integrated with Oracle ERP and CRM systems.
- SAP – Provides SAP Analytics Cloud, which integrates with SAP's ERP and CRM products.
- Google (Looker) – Integrates with Google Cloud Services, including data warehousing and business applications.
- Amazon Web Services (AWS QuickSight) – Offers cloud-based BI solutions that integrate with AWS services.

[Schlegel et al., 2024]



Leaders

Vendor	Main Product	Strengths	Weaknesses
Microsoft	Power BI	Massive market reach, integration with MS 365, Azure and Teams, cloud and application ecosystem, Copilot, pricing	Governance challenges (difficulties in managing and securing content across a large organization due to decentralized deployment), Azure-only
Salesforce	Tableau	Visual exploration, dedicated leadership, strong growth rate and large user base	Complex pricing, complex product portfolio
Qlik	Qlik Cloud Analytics	End-to-end analytics, AI investments, cloud- and application- agnostic	Lack of own cloud or application ecosystem, declining market momentum
Google	Looker	Market momentum, strong composability (provide flexible integration), multicloud-architecture (can make use of multiple cloud system)	Limited augmented analytic market penetration (e.g., limited automated insights and data storytelling), weak visual data preparation
Oracle	Oracle Analytics Cloud (OAC)	Enterprise cloud ecosystem, data management, integration capabilities	Limited value of OAC as an independent offering outside the Oracle ecosystem, expensive and difficult to use for SMEs
Thought-Spot	Thought-Spot Analytics	AI-driven insights, augmented analytics, composability, provide NLQ	Lack of own cloud or application ecosystem

Visionaries

Vendor	Main Product	Strengths	Weaknesses
SAP	SAP Analytics Cloud	End-to-end processes, integration with SAP ecosystem, decision-centric focus	Cloud-only, limited use outside SAP, average product capabilities
Pyramid Analytics	Decision Intelligence	Strong data prep (advanced capabilities to clean and transform data), deployment agnostic, generative AI chatbot, NLQ interface for text and speech	Market awareness, limited user community and support
IBM	Cognos Analytics	Strong reporting, decision analysis vision for predictive analytics	IBM cloud limitations, limited data preparation
TIBCO	Spotfire (TIBCO Spotfire)	Point and click UX to interact with visual data science applications, flexible deployment, cloud agnostic	High cost, steep learning curve
SAS	SAS Viya	End-to-end portfolio, AI capabilities, user collaboration in a unified platform	Pricing, limited interoperability, cloud transition lag (delays in adapting to cloud infrastructure)
Tellius	Tellius Insight Platform	Why, what and how interface, strong NLQ and automated insights, AI chatbot	Reduced market momentum, product gaps (lack of data reporting, storytelling, visualisation)

Challengers

Vendor	Main Product	Strengths	Weaknesses
Amazon Web Services (AWS)	QuickSight	Enable scaling (due to serverless architecture), cloud integration, AWS ecosystem, competitive pricing	AWS cloud-only deployment, weak data preparation
Domo	Domo Business Cloud	Use-case-driven approach, strong in marketing analytics, suitable for SME, strong in data preparation, AI flexibility No code/low code solutions.	Lack own cloud and/or application ecosystem, limited presence in several countries, weak AI powered NLQ
Alibaba Cloud	Quick BI	Broad sales channels, flexible pricing, composable (can be launched as a stand-alone system)	Limited outside China, competition (intense rivalry within Asia), rather limited investments in the ABI platform
MicroStrategy	MicroStrategy	Governance (strong security and compliance), strong reporting, open platform (interoperability capabilities), suite of generative AI tools	Market awareness, lack of strong surrounding application ecosystem, lack of augmented analytics capabilities

Niche Players

Vendor	Main Product	Strengths	Weaknesses
Incorta	Incorta Analytics	Strong data modelling and integration (automated data mapping), open and willing to partner to other platforms	Limited global market awareness, lack of functionality
Zoho	Zoho Analytics	Zoho ecosystem, integration with OpenAI, composable analytics (support third party ABI platforms)	Limited enterprise scalability, fewer advanced AI features, product capability gaps
Sisense	Sisense Fusion	Self-service augmented analytics, strong embedded offering (integrate analysis services within the users' applications), AI-driven insights	Lack of own data or application ecosystem, rather weak community support
GoodData	GoodData Cloud Native, GoodData Cloud	Cloud-native, ability to integrate with third-party application, (offer robust APIs), central metrics store (with metrics definitions), analytics as code (using code instead of drag-and-drop BI tools which include flexibility)	Assume customers with high level of engineering skills (due to analytics as code)