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## Gartner Says Worldwide Business Intelligence and Analytics Software Market Grew 8 Per Cent in 2013

STAMFORD, Conn., April 29, 2014 — Worldwide business intelligence (BI) and analytics software, consisting of BI platforms, corporate performance management (CPM) suites, analytic applications and advanced analytics, totalled \$14.4 billion in 2013, an 8 per cent increase from 2012 revenue of \$13.3 billion, according to Gartner, Inc.

"Overall, just like last year, the market is shifting gears, which is keeping growth in the single digits. At the same time, paradoxically, we're at the cusp of a series of tipping points which will facilitate unprecedented interest and adoption of analytics," said Dan Sommer, research director at Gartner.

There were a number of factors slowing the market in 2013. First, challenging macro had an effect. No region in the world grew faster than 12 per cent, which breaks the strategic assumption that many of the large vendors have held for years - that emerging markets are growing at a much faster rate. Secondly, confusion still reigns around how to best leverage analytics on big data. Much big data investment happened outside traditional BI in experimental silos, infrastructure and services. Thirdly, growth in IT-budgets is flat and IT-led traditional BI tools are over-bought. Therefore, some market share leaders targeting those constituents showed sub-market growth.

In the top spot, SAP once again had significantly higher revenue than any other vendor at \$3.1 billion with 21.3 per cent of the market, up 5.3 per cent from 2012 (see Table 1). Microsoft enjoyed the highest growth of the top five vendors in 2013, with revenue rising by 15.9 per cent compared with 2012, to reach \$1.4 billion.

**Table 1**

**Top Five Business Intelligence and Analytics Software Vendors, Worldwide, 2012-2013 (Millions of Dollars)**

Company	2013 Revenue	2013 Market Share (%)	2012 Revenue	2012-2013 Growth (%)
SAP	3,057.0	21.3	2,902.0	5.3
Oracle	1,994.0	13.9	1,952.0	2.1
IBM	1,820.0	12.7	1,735.0	4.9
SAS Institute	1,696.0	11.8	1,600.0	6.0
Microsoft	1,379.0	9.6	1,190.0	15.9
Others	4,422.0	30.8	3,932.0	12.5
<b>Total</b>	<b>14,368.0</b>	<b>100.0</b>	<b>13,311.0</b>	<b>7.9</b>

“As the market shifts gear, we see a series of tipping points in 2014 that will accelerate adoption, but it may come from a different place,” said Mr Sommer. “These tipping points are that half of BI and analytics spend will be business driven, half of new license spend will be driven by data discovery requirements, and half of organisations will consider deploying BI in the cloud, at least tactically.”

“Right now we’re in a trend of proliferating information sources, applications and buying. Those vendors, mainly outside the top five, that aligned themselves with this caught disproportionately higher interest and growth relative of market share for net new buying, albeit from smaller market footprints. To counter, the big vendors are expected to dramatically improve their stories around becoming more nimble with data discovery and cloud this year and the next. Finally, analytics is also moving beyond just being a singular tool to become more omnipresent, embedded in various other applications and infrastructures. All of these trends, paradoxically to the single-digit growth, cement analytics as a top priority and will tip it to touch a much broader base, down to the personal analytics level,” said Mr Sommer.

On a segment level, data discovery requirements drove growth in BI Platforms showing a slow but steady shift in emphasis from reporting centric to analysis centric tools (see Table 2). Advanced analytics is also growing quickly, showing the increasing focus organizations give to predictive and prescriptive analytics.

**Table 2**

**Business Intelligence and Analytics Software by Segment, Worldwide, 2012-2013 (Millions of Dollars)**

Subsegment	2013 Revenue	2013 Market Share (%)	2012 Revenue	2012-2013 Growth (%)
Analytic Applications and Performance Management	2,001	13.9	1,890	5.8
BI Platforms	8,550	59.5	7,857	8.8
CPM Suites	2,735	19.0	2,602	5.1
Advanced Analytics	1,082	7.5	962	12.5
<b>Total</b>	<b>14,368</b>	<b>100.0</b>	<b>13,311</b>	<b>7.9</b>

Source: Gartner (April 2014)

More detailed analysis is available in the report "Market Share Analysis: Business Intelligence and Analytics Software, 2013". The report is available on Gartner's web site at <http://www.gartner.com/doc/2723017>.

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