Gartner

Magic Quadrant pour les plateformes d'analyse et de business intelligence

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Les leaders des données et de l'analyse utilisent les plateformes ABI pour répondre aux besoins de l'informatique, des analystes, des consommateurs et des data scientists. Si l'intégration aux écosystèmes cloud et aux applications métiers constitue une condition de sélection cruciale, les acheteurs ont également besoin de plateformes prenant en charge la gouvernance, l'interopérabilité et l'IA.

Définition/description du marché

Les plateformes d'analyse et de business intelligence, rendues possibles par l'informatique et renforcées par l'IA, permettent aux utilisateurs de modéliser, d'analyser et de partager des données.

Les plateformes d'analyse et de business intelligence (ABI) permettent aux organisations de comprendre leurs données. Par exemple, quelles sont les dimensions de leurs données, telles que le produit, le client, le temps et la géographie ? Les gens doivent pouvoir poser des questions sur leurs données (par exemple, quels clients sont susceptibles de se désinscrire ? Quels vendeurs n'atteignent pas leurs quotas ?). Ils doivent être capables de créer des mesures à partir de leurs données, telles que la livraison à temps, les accidents du travail et la satisfaction des clients ou des employés. Les organisations doivent mélanger les données modélisées et non modélisées pour créer de nouveaux pipelines de données qui peuvent être explorés pour détecter des anomalies et d'autres informations. Les plateformes ABI rendent tout cela possible.

Fonctionnalités obligatoires

- Visualisation des données : prise en charge de tableaux de bord hautement interactifs et exploration des données grâce à la manipulation d'images graphiques.
- Gouvernance : les capacités de gouvernance suivent l'utilisation et gèrent la manière dont les informations sont *sécurisées* , partagées et promues.
- Création de rapports : cette fonctionnalité fournit des rapports paginés au pixel près qui peuvent être planifiés et diffusés à une large communauté d'utilisateurs.

- Catalogue Analytics : affichage du contenu analytique qui facilite sa recherche et sa consommation. Le catalogue est consultable et fait des recommandations aux utilisateurs.
- Préparation des données : prise en charge par glisser-déposer, combinaison de données provenant de différentes sources, pilotée par l'utilisateur, et création de modèles analytiques (tels que des mesures, des ensembles, des groupes et des hiérarchies définis par l'utilisateur).
- Intégration de la science des données : capacités qui permettent le développement et le prototypage augmentés de modèles composables de science des données et d'apprentissage automatique (DSML) par des data scientists citoyens et des data scientists avec une intégration sophistiquée dans l'écosystème DMSL plus large.

Caractéristiques communes

- Informations automatisées : possibilité d'appliquer des techniques d'apprentissage automatique (ML) pour générer automatiquement des informations pour les utilisateurs finaux (par exemple, identifier les attributs les plus importants dans un ensemble de données).
- Metrics layer: A virtualized layer that allows users to create and define business metrics as code, govern those metrics from data warehouses, and serve the downstream analytics, data science and business applications.
- Data storytelling: Combination of data visualization with narrative techniques to package and deliver insights in a compelling, easily understood form for presentation to decision makers.
- Natural language query (NLQ): This capability enables users to ask the data questions using terms that are either typed into a search box or spoken.
- Collaboration: Application of collaboration capabilities to analytics workstreams for organizations that want to provide an environment where a broad spectrum of users can simultaneously co-produce an analytics project
- Composability: Enabling embedding analytics, action frameworks and a decision-centric user interface via low- and no-code application building blocks like APIs/software development kits (SDKs) to assemble flexible, modular, consumer-friendly multiexperience user interfaces from existing D&A assets, integrated with generative AI.

Magic Quadrant

Figure 1: Magic Quadrant for Analytics and Business Intelligence Platforms

Gartner (June 2024)

Vendor Strengths and Cautions

Alibaba Cloud

Alibaba Cloud is a Challenger in this Magic Quadrant. It competes primarily in the Asia/Pacific market. Alibaba Cloud is the largest public cloud platform provider in the region. Its product, Quick BI, offers data preparation, visual-based data discovery, interactive dashboards and reports. The platform is available as a SaaS option running on Alibaba Cloud's infrastructure. Quick BI is also available as an on-premises option on Alibaba Cloud Apsara Stack Enterprise Edition, while embedded analytics options are available with Alibaba Business Advisor and Alibaba DingTalk.

In 2023, Alibaba Cloud launched a natural language module on Quick BI — called Smart Q. Powered by large language models (LLMs) from its BI domain, Smart Q provides a conversational experience for auto insights, data storytelling and report aesthetic construction. Alibaba Cloud has enhanced its ability to apply industry-specific analytics with domain knowledge, especially in retail and automotive industries.

Strengths

- Broad sales channels and flexible pricing model: Quick BI is sold on Alibaba Cloud, Taobao app market (10 million merchants), DingTalk app market (millions of companies) and other platforms with massive customer markets. By offering customizable function packages and pricing models to suit enterprises of various sizes, Alibaba Cloud's pricing model is positioned to be competitive within the market.

- Composable analytics: Quick BI can be launched as a stand-alone tool. But it is well-known as part of the Alibaba LYDaaS portfolio, which delivers modular and reusable data and analytics (D&A) capabilities and closes the loop of analytic tasks with well-managed metadata across the whole data pipeline. Quick BI can also be embedded into scenario-based SaaS solutions provided by partners for certain use cases and industries.

- Data literacy program: Alibaba has been pushing customer success by launching systematic data literacy training to upskill its users and grant certifications. The training program is coupled with incentives that provide coupons to offset the license cost and store credits for Alibaba Cloud's e-commerce store.

Cautions

- Geographical presence and lower market momentum: The majority of Alibaba Cloud Quick BI clients are based in China. Although it has started to expand overseas, it has a minimal installed base elsewhere. As a SaaS offering, Quick BI has often been packaged into the vendor's integrated LYDaaS (Data Middle Office) solution. It has limited adoption outside of the Alibaba ecosystem.

- Limited investment: Although Alibaba Cloud is large in overall company size, Quick BI is not a strategic focus compared with the vendor's DBMS and AI product lines. Quick BI R&D has around 100 employees, which is significantly lower than the headcount for other major hyperscalers' ABI platforms.

- Complex competition environment: With Quick BI, Alibaba Cloud operates mainly in the Asia/Pacific region. Besides global vendors, it is also competing with other well-known vendors based in China, such as FanRuan Software, Yonghong Tech, Smartbi Software and GuanData.

Amazon Web Services

Amazon Web Services (AWS) is a Challenger in this Magic Quadrant. AWS' ABI offering, Amazon QuickSight, largely attracts customers of the broader AWS ecosystem. Such customers cite strength of integration with the AWS D&A stack, scalability, performance and a competitive pricing model as key reasons for adoption.

AWS has extended its natural language query (NLQ) capability — Amazon Q — to include LLMs, incorporating generative AI to enable new capabilities and enhance existing ones. Amazon Q now enables business analysts to build (and refine) dashboards and create new calculations. Analytics consumers can use NLQ on their data beyond what's in their dashboard — in particular to create executive summaries and autogenerate data stories. Data stories stay in QuickSight, allowing the

insights to remain governed. Amazon Q has various tuning and customization capabilities that allow users to optimize performance.

Beyond Amazon Q, AWS has also improved its data science integration capabilities for users to leverage forecasting and predictions.

Strengths

- Competitive pricing: Amazon QuickSight pricing starts at $3 per user/month for a Reader license, including the Q&A capability of Amazon Q. Amazon QuickSight provides pricing flexibility to help clients avoid overprovisioning by offering a combination of per-user and capacity-based pricing that scales economically.

- Integrated global cloud service: AWS is one of the world's largest cloud service providers (CSPs) by revenue and global footprint. Being part of the AWS D&A stack is a major strength for QuickSight customers. Many enterprise architects are investing in CSP stacks and prioritizing cloud integration (e.g., Amazon Redshift, Amazon Athena, Amazon EMR) over competitive differentiation of analytic features.

- Serverless architecture enables scale and performance: Amazon QuickSight's serverless cloud architecture enables high performance and can scale to high concurrency deployments based on usage, rather than fixed resources, minimizing onerous infrastructure, and capacity planning and management.

Cautions

- Limited deployment options: With Amazon QuickSight, deployment is limited to AWS cloud only. Therefore, it does not run on servers hosted on-premises or in hybrid deployments, and cannot be deployed in private cloud and multicloud environments. Readers should note that QuickSight can connect to, and integrate with, other databases running prebuilt or hosted on other clouds.

- Governance capabilities rely on separately licensed Amazon products: Amazon QuickSight is overly dependent on separately licensed products for which users must pay extra. For example, any enhanced governance capabilities require Amazon DataZone integration, which is licensed separately. In addition, AWS CloudTrail is needed to log QuickSight activities. CloudTrail is a web service that records API activity in the client's AWS account. Audit logs can be consumed through QuickSight's Athena connector, but administrators have to manually create a monitoring dashboard to visualize these logs. Alternatively, administrators view the data through Amazon CloudWatch (also separately licensed) and build a metrics dashboard there.

- Gaps in data preparation capabilities: As more end users ask for data preparation features, QuickSight currently lacks native capabilities to support data cleansing and extraction, transformation and loading (ETL). However, within AWS, these capabilities are available via AWS Glue DataBrew and AWS Glue on a pay-for-use basis.

Domo

Domo is a Challenger in this Magic Quadrant. Its use-case-driven approach has traditionally been preferred by line-of-business leaders, but product innovations over the last few years make Domo a popular option among other key stakeholders both in technical and executive teams.

Domo has carved out a strong position in the marketing analytics space and is also gaining traction with organizations that lack a robust data warehouse foundation, particularly small and midsize businesses (SMBs). Domo now offers an end-to-end architecture, from data collection and ETL to BI, analytics and app creation. Its library of over 1,000 native data and application connectors, coupled with its native integration with write-back with cloud data platforms, enables fast time to value by accelerating the data ingestion, integration and transformation process.

Strengths

- Multipersona support: Domo delivers capabilities that sufficiently address the business analyst and data scientist use cases. Domo's Magic ETL provides outstanding data preparation capabilities, allowing business users to easily connect, mash and enrich data. Domo's App framework delivers low-code capabilities that allow citizen developers to connect data insights to business process workflows and conduct "what-if" analysis.

- Bring your own AI model: Domo AI Model Management allows Domo users to deploy third-party models (e.g., OpenAI, Hugging Face, Databricks, Amazon Bedrock) or build and train their own models from Jupyter Workspaces and AutoML hosted in Domo's environment. Data scientists can use the platform to deploy models to Magic ETL, apps and workflows, empowering low-code users to easily distribute insights throughout the organization.

- New consumption model: Domo has introduced a new pricing model to drive adoption and user experimentation across the organizations. The credits-based consumption model does not limit the number of users and comprises a freemium model, where any user can fully explore the platform's capabilities.

Cautions

- Lack of broader application ecosystem channels: Domo is at a competitive disadvantage when compared with ABI platform vendors that leverage the existing installed base of their own application ecosystem and cloud platforms. Some buyers will prioritize ABI platform vendors that offer synergies with their own cloud (e.g., AWS, Microsoft or Google) and application ecosystems (e.g., Salesforce, Oracle or SAP).

- Narrow geographic presence: As a cloud-based vendor, Domo relies on virtual presence for countries beyond the U.S., Japan, the U.K. and Australia. This becomes challenging for clients that require local billing and local language support. Users should consider the suitability of cloud-based or virtual support versus an in-country presence.

- Limited augmented analytics: Despite offering good data storytelling and analytics catalog capabilities — both key to the augmented consumer persona — Domo has just started to release new AI-powered NLQ features, thus still lags some of its competitors in NLQ.

GoodData

GoodData is a Niche Player in this Magic Quadrant. GoodData has found a strong niche in use cases where customers are interested in building and integrating a metrics store as a universal semantic layer in their environment, using a headless approach tightly aligned with mature DevOps practices. GoodData's approach to "analytics as code" is differentiating. It offers robust APIs and SDKs for front-end customization and integration with third-party ABI and data science tools and other applications.

GoodData's two major offerings are: GoodData Cloud Native (with deployments available on AWS, Microsoft Azure, and Google Cloud Platform [GCP], as well as being deployable on Kubernetes, including on-premises data centers); and GoodData Cloud (its SaaS offering). Both benefited from improvements throughout 2023. GoodData has shifted market positions from primarily an embedded analytics focus to a headless BI-first platform. Moreover, in the past year it has improved its BI front end, adding an in-memory caching and materialization layer, visual data prep, an analytics catalog view, and an AI-driven assistant.

Strengths

- Headless vision: GoodData continues to focus on the market's need to have a centralized metrics store for consistency of metric definitions and mapping to the business objectives. Partnerships with data pipeline companies and integrations with other ABI vendors for metrics push and pull allow GoodData to position itself as a neutral player in the metrics layer market.

- Composability-first focus: GoodData's business model and features follow the analytics-as-code tenet and cater for the composability market through the ability to integrate and align analytics content development with the application development life cycle. This approach allows GoodData to help analytics teams to scale the data value chain operations when the need for automation and release management increase.

- Availability of third-party resources: GoodData distinguishes itself with its availability of third-party resources for implementation and its ability to integrate with third-party applications, according to Gartner Peer Insights. This integration allows GoodData to support a wider range of use cases by extending its capabilities through the partner network and effectively fitting into a technology ecosystem.

Cautions

- Limited to mature buyers: Taking an analytics-as-code approach to scaling intelligence within the organization assumes a high level of data engineering and governance maturity. Potential buyers must determine whether they are mature enough to fully leverage GoodData's offering.

- Lagging adoption of headless metrics layers: GoodData has positioned itself as a leading innovator in the metrics layer market. The caution here is that metrics layers, in general, will be a fluid concept that will continue to evolve over the short- to midterm. Several analytics vendors are starting efforts to build their own metrics stores for centralization of metrics. Buyers will

have to either choose metrics stores technologies that are “neutral,” or adopt the metrics layers provided by the larger ABI vendors and centralize their metrics definitions there.
- Traditional ABI deployments are limited: GoodData — as evaluated — excels as a composable, headless BI solution with well-rated DSML integration. However, it is relatively weak in supporting traditional ABI use cases.

Google

Google is a Leader in this Magic Quadrant. Google Cloud’s Looker is a multicloud-architected ABI platform that offers highly governed analytics, including self-service visualizations and dashboards, and a code-first semantic modeling layer based on LookML. Looker Studio (formerly Data Studio) can be used entirely on its own at no cost, or it can connect to Looker for users to utilize the semantic layer and blend governed and ungoverned data together.

In 2023, Google integrated Looker Studio with the Looker semantic layer to deliver a more comprehensive platform built for production reports and dashboards, self-service ad hoc questions, and analytic content developers. Looker’s analytics platform provides a version-controlled, collaborative framework to both build internal BI and enable customers to build applications.

Strengths

- Growing market momentum: Gartner has received a large volume of inquiries about the Looker platform in the last 12 months. Looker has a large social network following. It has also received many mentions in Gartner Peer Insights reviews in competitive evaluation by ABI platform buyers. With the integration of Looker Studio and LookML, Google now unifies self-service and centrally governed analytics.

- Excellent composability: In addition to its developer-focused, virtualized semantic modeling and metrics layer, the Looker product is differentiated as a leader in composability. Its modular architecture enables headless BI integration with other ABI platforms and open-source data technologies.

- Strong D&A stack: Looker is integrated with Google’s broader D&A and AI ecosystem, including BigQuery and Vertex AI. It is also connected to the Google Workspace ecosystem with direct integrations into Google Sheets, Chat and Slides. Looker can leverage Google’s LLMs, including Gemini.

Cautions

- Limited augmented analytics market penetration: Google has started the journey toward AI enablement of business analyst and analytics consumers, through Looker Studio and better NLQ. However, Google remains poorly aligned with the shifting needs of some analytic buyers — in particular, emerging capabilities for augmented analytics such as automated insights, analytics catalogs and data storytelling (only this year offering this last critical capability).

- Weak product execution of visual data preparation capabilities: Being code-first and not yet AI-enabled, Looker is less suitable for business users. With the inclusion of Looker Studio Pro

licenses, however, users now have self-service data prep capabilities more readily available, giving them the ability to blend modeled and unmodeled data.
- Limited native automated insights: Automated insights remain weak compared with Looker's competitors. Some capabilities in this category are only available when incorporating Google products outside Looker through Looker's extension framework. Key driver analysis, outlier detection and clustering are visualized from BigQuery ML models, but are not native and may need significant configuration.

IBM

IBM is a Visionary in this Magic Quadrant. IBM Cognos Analytics offers consistent core capabilities matched with extensive data connections, query optimizations and customization options. Key features include: rich presentation layers and visuals, including nested dashboards (tabs within tabs), narrative insights and integration advancements, combined with an analytics hub with capable search and smart recommendations.

In 2023, IBM increased support for intersecting BI and predictive analytics workloads. Business analysts can readily identify trends and forecast results, better understand relevant influences and correlations, and calculate quick forecasts. Data scientists are able to do deeper data analysis before using the embedded Jupyter Notebook UX to build ML models on curated datasets.

Strengths

- Analytic catalog vision: IBM offers a wide range of solutions and capabilities aimed at personas across the enterprise reporting ecosystem. Anchored on the IBM Analytics Content Hub, easy-to-manage content is available to analysts, data scientists, app developers, consumers, executives and others, all in one place.

- Strong content distribution for the enterprise: For many years, the core of Cognos Analytics has been enterprise reports. These essential capabilities allow advanced report authors to not only customize pixel-perfect layouts for internal and external reports, but also to build complex query logic to accommodate unique business requirements.

- Decision intelligence vision: Extending beyonds its roots in enterprise reporting, IBM has assembled a broad portfolio of software applications that include planning, optimization and business rules, enabling it to provide decision intelligence capabilities for clients with prescriptive analytics aspirations. Conversation-assisted experiences exist today in Cognos Analytics. Future plans include a stand-alone watsonx BI assistant with embedded capabilities.

Cautions

- Public cloud: Although Cognos Analytics can be run on any cloud in client-managed deployments, the Cognos Analytics SaaS offering runs on IBM Cloud. IBM's company focus has been on developing and delivering industry clouds, particularly targeting financial services and the migration of core enterprise workloads. The company has had some success in financial services, and in helping migrate on-premises IBM workloads to its public cloud. But the

technical capabilities of IBM Cloud and its growth rate in public cloud services continue to lag behind the market.

- Limited sales adoption enablers: While being a large vendor with a capable D&A offering, IBM's lack of a digital workplace application "uplift" (e.g., Google Workspace, Microsoft 365, Zoho Workplace) or an enterprise application "tailwind" (e.g., Oracle, Salesforce, SAP) limits IBM Cognos Analytics' touchpoints with organizations that might invest in the platform.

- Lagging business analyst support: While IBM scores well for enterprise features such as reporting and analytics catalogs, it lags on features such as data preparation that are required for business analysts and content authors to create new data pipelines.

Incorta

Incorta is a Niche Player in this Magic Quadrant. Incorta's key value proposition is its ability to quickly model data from enterprise applications such as SAP, Oracle, Salesforce and JD Edwards. With Incorta's Direct Data Mapping technology, customers eliminate many steps in the data modeling and ETL process. Data is ingested without transformation in its original form, and joins are inferred from the metadata. On top of this data warehouse automation capability, Incorta adds data acquisition, data management and data visualization/reporting capabilities.

In 2023, Incorta expanded its partnership with Google with a joint offering for enterprise customers looking to access Oracle data using the Google Cloud Cortex Framework. Also, Incorta partnered with Workday Adaptive Planning to enable financial planning and analysis (FP&A) and finance teams with access to business and financial data.

Strengths

- Agile operational reporting: Business users can start with high-level KPIs and drill down to transaction-level detail, issue ad hoc queries, and reach across functional areas and across data sources. This is accomplished without lengthy ETL and data warehousing efforts.

- Openness across the platform: Incorta is one of the few vendors in this Magic Quadrant willing to partner with other ABI platform vendors. So customers that want to leverage Incorta's direct data mapping can also integrate with other ABI platforms as the front-end reporting and analysis layer.

- Strong appeal for low-maturity customers: Gartner client inquiry indicates that Incorta tends to be shortlisted by organizations that lack a high degree of D&A maturity and that seek a quick boost to their capabilities largely derived from automating the data warehouse creation process.

Cautions

- Lack of functionality for the augmented consumer: Incorta doesn't have as strong functionality as other ABI platforms for the augmented consumer. It is lagging other vendors in functionality such as automated insights and NLQ.

- Competition from packaged analytic applications: Most of Incorta's business comes from integration with large enterprise applications. Increasingly, enterprise application vendors will

embed fully comprehensive ABI platforms into their applications, reducing the overall demand for a data warehouse automation platform like Incorta.

- Lack of market awareness: Gartner inquiry and search data, as well as a review of job postings on third-party websites, reveal slower momentum for Incorta relative to competitors in this Magic Quadrant. Customers should be aware that Incorta's small customer size will make it harder to find skilled resources. However, most of Incorta's value proposition is based on automation of the data mapping process, which will keep the total number of administrators relatively low.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its primary ABI platform, Power BI, has massive market reach and momentum through Microsoft 365, Azure and Teams integration, flexible pricing, well-above-average functionality, and an ambitious product roadmap.

In 2023, Microsoft announced Fabric to provide a comprehensive and integrated data analytics platform. As a result, Power BI has become part of a broader suite that, in addition to ABI, also delivers data management, data science and real-time analytics. While the Power BI Premium product capabilities will not change, starting 1 July 2024, customers will no longer be able to buy the P-SKU and instead will need to buy the F-SKU for Fabric.

Strengths

- Strong combination of price, functionality and ecosystem: Over the last four years, Microsoft has become the dominant vendor in the ABI platform market due to a combination of low prices, comprehensive functionality, and integration with a widely deployed ecosystem that includes Microsoft 365, Azure and Dynamics.

- Copilot brand closely associated with generative AI: Starting with Copilot for Microsoft 365 and now moving onto Copilot for Power BI, Microsoft can leverage emerging generative AI technologies to drive adoption and accelerate the report creation process.

- Power portfolio and product ambition: Microsoft has a clear vision for cross-utilization of Power BI, Power Apps and Power Automate to drive business value. Power Apps can be embedded in Power BI dashboards, or it can access Power BI datasets. Power Automate flows can be constructed to take various actions based on the data. AI-powered services, such as text, sentiment and image analytics, are available within Power BI Premium.

Cautions

- Governance of content creation and publication: Gartner continues to receive a significant number of inquiries from Power BI customers struggling to govern the analytic content creation and publication process. These concerns will be exacerbated in the Copilot era. Customers express concerns over multiple ways to accomplish most tasks, such as modeling data or promoting content. For example, data modeling tasks can be done with datasets, data marts, dataflows and Dataverse. With the low cost and easy setup, Power BI deployments tend to proliferate, and it is difficult to enforce standard governance practices.

- Unproven interoperability: While most Power BI customers appreciate the tight integration of the Microsoft architecture, there is an increasing demand to see more interoperability with competitive platforms. Microsoft Fabric's OneLake architecture is a step in the right direction toward working with other data management platforms. However, how well OneLake will perform with other databases is yet to be seen.

- Azure as the only deployment option: Microsoft does not give customers the flexibility to choose a cloud IaaS offering. While data connectivity enables multicloud and hybrid scenarios, Microsoft's Power BI service runs only in Azure.

MicroStrategy

MicroStrategy is a Challenger in this Magic Quadrant. MicroStrategy excels at reporting, manageability and governance. It offers rich BI and reporting functionality, including HyperIntelligence, which dynamically identifies predefined insights within existing applications. MicroStrategy compensates for the lack of a surrounding application ecosystem by offering strong ecosystem interoperability capabilities, such as integration with Microsoft Teams, Excel and PowerPoint to support collaboration and personalized reporting. HyperIntelligence provides a no-code solution for injecting contextual analytics and generative AI on top of existing platforms and applications.

MicroStrategy made a significant leap forward in October 2023 with the introduction of MicroStrategy AI, a suite of generative AI tools. Similar to the impact of HyperIntelligence on insights, MicroStrategy Auto — a component of MicroStrategy AI — extends the reach of AI capabilities beyond the boundaries of the BI environment. This inclusive approach caters to a diverse user base, encompassing experts, citizen developers and consumers alike, enabling a wide range of users to benefit from AI-driven functionalities.

Strengths

- Generative AI experience: MicroStrategy Auto harnesses the power of AI to deliver significant value across user roles. With features like Auto SQL for experts, Auto Dashboard for analysts and Auto Answers for all, MicroStrategy empowers users with intelligent automation capabilities. Auto can be deployed as a stand-alone databot enabling integration into portals and applications, as well as access through HyperIntelligence and Mobile, ensuring widespread availability of bot-powered data insights, even without a traditional dashboard.

- Open platform: MicroStrategy excels in prioritizing both deployment and data connectivity interoperability, making it a standout vendor in the era of multicloud and diverse business application stacks. This interoperability is further strengthened by MicroStrategy's robust direct query architecture, enabling efficient and direct access to data sources. MicroStrategy is available on-premises and within AWS, Microsoft Azure and GCP, providing customers with agility and freedom of choice to support their evolving business needs.

- Enterprise reporting and governance: MicroStrategy remains highly competitive for both its governance and reporting capabilities. The combination of these two capabilities, along with its

robust analytics catalog capabilities and its reputation for scalability and security, make MicroStrategy a strong player for enterprise buyers.

Cautions

- Market awareness: Despite being a well-established, long-standing player in the ABI platform market, MicroStrategy sometimes finds itself overshadowed amid a crowded landscape with emerging players and innovative, attention-grabbing offerings.

- Absence of surrounding application ecosystem: The cloud and applications ecosystem surrounding ABI platforms continues to play a critical role in driving the growth and development of this market. Many organizations rely on technical and commercial synergies of the surrounding vendor ecosystem to choose ABI platforms. Although MicroStrategy's platform is offered as a service on all major cloud hyperscalers, and interacts well with other cloud technologies, ABI solutions owned by cloud and business application megavendors have a go-to-market advantage.

- Augmented analytics capabilities: While MicroStrategy has made notable advances with the introduction of generative AI capabilities through MicroStrategy AI, its augmented capabilities still lag most of its competitors in delivering automated insights.

Oracle

Oracle is a Leader in this Magic Quadrant. Oracle Analytics Cloud (OAC) is embedded in Oracle Fusion Apps and brings together business data, prebuilt data pipelines, analytics and AI models. OAC delivers insights and recommendations to specific roles in the process. Oracle is recognized for its leadership in database management and comprehensive cloud business applications, but is increasingly being recognized as a formidable cloud service provider (CSP) for its Oracle Cloud Infrastructure (OCI) offering. Oracle benefits from some of the same advantages open to other large CSPs, including better price performance when leveraging its products and infrastructure end to end.

In 2023, Oracle extended its AI-based data analytics into document understanding, adding to its vision, text and language capabilities. Oracle customers can now leverage generative AI to create data stories. Oracle also launched Fusion Data Intelligence, the next generation of Fusion Analytics intended to embed analytics and AI content directly into business applications and workflows, making them more actionable.

Strengths

- Decision-centric business apps: Oracle continues to progress decision workflows embedded in business applications and processes, empowering specific roles with recommendations at the point where they make the most impact.

- Enterprise cloud ecosystem: Oracle offers an end-to-end cloud solution, including infrastructure, data management, analytics and analytic applications, with recognized data centers in cloud regions globally.

- Data management and integration: Oracle has acquired global recognition for its data management and integration capabilities. Its prebuilt data pipelines and AI models accelerate business outcomes by overcoming the biggest obstacle to analytics — data integration. Clients that invest in Oracle products across the D&A pipeline will see reduced efforts in data management and integration.

Cautions

- Limited use cases outside the Oracle ecosystem: Customers that have not invested in Oracle for its cloud infrastructure, data management or Fusion Apps will find less value in the OAC product as an independent offering. The vendor does offer access to non-Oracle apps, but Gartner has not seen broad customer adoption.

- Lack of momentum for smaller businesses: SMB customers will find OAC to be expensive and difficult to use without significant enterprise investment in other Oracle products. Some SMB customers in this space report the product's complexity as a challenge.

- Lack of knowledgeable comprehensive resources: Oracle has spent significant effort in upscaling its OAC resources, but some customers report difficulties in identifying Oracle resources familiar with both OAC and OCI. We expect this problem to be alleviated as both offerings grow in popularity.

Pyramid Analytics

Pyramid Analytics is a Visionary in this Magic Quadrant. Pyramid offers an integrated suite for modern ABI across the data life cycle. Pyramid's design is underpinned by ML-based data preparation and data wrangling, as well as data discovery and sharing via business-user-generated dashboards and reports in a low-code/no-code environment. Pyramid is deployment-agnostic, allowing for hosting in AWS, Microsoft Azure, GCP, Oracle Cloud, Alibaba or on-premises.

In 2023, Pyramid added generative AI capabilities, leveraging a multi-LLM strategy for flexibility. This means that its NLP can flexibly use Pyramid's own internal portable language model or third-party LLMs. Pyramid provides an NLQ interface for text and speech input and output that supports analytics across diverse data sources, formats and structures. Pyramid's chatbot can create comprehensive storyboards with slicers, adjustments and layouts, as well as handle instructions, functions and AutoML logic. It also generates text-to-Python and text-to-image (background) elements for storyboards.

Strengths

- Multiple data prep experiences: Pyramid Analytics provides four experiences for the preparation of data for analytics: (1) Its one-click quick Smart Modeling tool for augmented model building includes data ingestion; (2) the quick Direct Model experience creates a semantic data model on top of an existing database without data manipulation; (3) the Model Lite experience includes a step-by-step wizard; and (4) an advanced ETL-like process for proficient end users comes with pipeline workflows and ML tools in Model Pro. All interfaces produce a reusable data model that can be optionally shared across multiple reports and projects.

- Data science and machine learning capabilities: Pyramid extended its Data Science Workbench this year to include support for Jupyter Notebooks, AutoML and capabilities for training, testing and deploying ML models. Alongside its other offerings, these capabilities further the collision between ABI and DSML, allowing Pyramid to support multiple analytics personas.

- Multiple embedding options: Pyramid provides multiple embedding options, including a hub that can be embedded to allow users to create their own collages from content. With Pyramid analytics, embedding is injectable and not achieved through iFrame. This helps to ensure consistent performance of content across embedding and nonembedding use cases. Pyramid now has APIs available as client SDKs in JavaScript, TypeScript, C#, Java, Python and PHP.

Cautions

- Missing metrics layer capabilities: Pyramid does not provide custom-made native connectors to other ABI platforms, though Pyramid content can be accessed via OData queries.

- Limited user community, training and resources: Some Pyramid users report that it is difficult to find help and resources when attempting to solve problems. Users have also stressed that the tool and UX can be difficult to learn and use as a beginner, and that documentation is difficult to find and understand.

- Lack of market awareness: While Pyramid has seen market improvement and increases in media coverage, it continues to experience a lack of awareness among consumers looking for low-code/no-code ABI solutions. Gartner rarely sees Pyramid shortlisted.

Qlik

Qlik is a Leader in this Magic Quadrant. Qlik Cloud Analytics is offered as a SaaS platform and includes Qlik Sense, Qlik AutoML and Qlik Application Automation. While still widely recognized for its analytics capabilities, Qlik's recent acquisition of Talend and previous acquisition of Attunity make it a formidable data integration vendor as well.

Qlik has made a significant investment in AI, launching Qlik Staige in September 2023. Staige combines a data foundation, automation and AI-based descriptive, predictive and prescriptive analytics to accelerate the delivery of decision-centric solutions. In November 2023, Qlik announced Microsoft Fabric connectors and an Insight Advisor chatbot integrated with Microsoft Teams. Qlik also released AWS Bedrock connectors. In January 2024, Qlik acquired Kyndi, an NLP, search and generative AI platform.

Strengths

- End-to-end data and analytics: Qlik continues to advance its data foundation by acquiring Talend and its formidable data integration. Add to this a significant leap forward in data science integration and first-mover advantage in LLM integration, and it is clear that Qlik has created a powerful data-to-decision workflow for enterprise developers and analysts.

- Renewed market recognition: Qlik has been able to move into the spotlight via notable strategic acquisitions, in particular the acquisition of Talend for data integration. Qlik is among the top five companies by revenue for both ABI platforms and data integration tools.

- Cloud- and application-agnostic: Qlik is offered as a service across all major clouds, including Alibaba Cloud. It also has integration with many major enterprise cloud applications. Qlik can be a comfortable choice for organizations with multicloud implementations with a diverse range of enterprise applications.

Cautions

- Lack of analytics market momentum: Qlik's progress as a popular analytics platform seems to have slowed, with the company losing market share over the past several years. It remains to be seen whether the recent acquisition of Talend and a focus on extending AI capabilities reverses this trend.

- Lacks a cloud or application ecosystem: Many buyers prefer tools that integrate well with the D&A ecosystem of their business application or cloud platform provider, over those with unique features. Despite its cloud-agnostic approach and partnering, Qlik's lack of a cloud infrastructure service or business applications (e.g., CRM/ERP) limits its sales strategy for enterprise adoption.

- Lack of robust vertical solutions: Qlik offers few vertical solutions. Instead, it relies on partners to create vertical solutions. Vertical focus only represents a small portion of its go-to-market strategy.

Salesforce (Tableau)

Tableau, a Salesforce company, is a Leader in this Magic Quadrant. Its products are mainly focused on visual-based exploration that enables business users to access, prepare, analyze and present findings in their data. Tableau has global operations and serves clients of all sizes.

In 2023, Tableau introduced Tableau Pulse, an augmented analytics experience designed for business users in day-to-day workflows. Pulse is built on a new metrics layer that improves governance and trust. Tableau has enhanced its embedded analytics capabilities by including an embedded playground that automatically generates code snippets to interact with Tableau "vizzes." It also has introduced usage-based pricing to scale embedded analytics for use cases with high numbers of users who interact with analytics infrequently.

Strengths

- From monolithic to composable analytics: Tableau is improving both its technology and commercial flexibility. It has reengineered its architecture to become more composable for agility, including the newly released VizQL data service for developers, a new Tableau Pulse metrics layer on top of data sources for generative analytics experience, and a new consumption-based pricing model in its Embedded Analytics offering. This progressive vision toward composability will allow users to extract insights from Tableau more easily.

- Dedicated leadership: Despite being acquired by Salesforce, Tableau now operates under its own dedicated leadership team, inclusive of a CEO, CPO and CMO. This structure underscores Tableau's strategic significance within the Salesforce portfolio and reaffirms the commitment to its D&A business.

- Strong corporate viability: Tableau reported a robust 16% growth rate in FY23, outperforming many vendors in this Gartner Magic Quadrant, some of which reported business contraction.

Cautions

- Pricing structure: Tableau primarily employs a role-based pricing model. Tableau Embedded Analytics, with its consumption-based pricing model, brings a new layer of complexity to the calculation.

- Complexity of product portfolio: Tableau has significantly expanded its product suite, adding Tableau Pulse capabilities under its Tableau AI umbrella. This extensive product packaging, while demonstrating the company's innovative capabilities, may pose a challenge for clients in comprehending the distinct functionalities and variations across different versions.

- Changing competitive dynamics: Most of the large cloud and business application vendors are repackaging their products in a comprehensive data and analytics suite. In order to effectively compete in the areas of large-scale enterprise reporting and advanced analytics use cases, Tableau needs to strategically refine its market position within Salesforce Data Cloud.

SAP

SAP is a Visionary in this Magic Quadrant. SAP Analytics Cloud is a cloud-native multitenant platform with a broad set of capabilities across data visualization, reporting and augmented analytics. It unifies analytics and enterprise planning to build end-to-end processes, from insights to business actions. With the announcement of SAP Datasphere in the last year, SAP Analytics Cloud significantly increased its market momentum, as measured by Gartner client inquiry, searches and Gartner Peer Insights.

In 2023, the launch of SAP Datasphere (for business data fabric) further unified SAP's D&A in the cloud. SAP also extended planning and analytics capabilities to its ERP customers through its RISE with SAP (for large enterprises) and GROW with SAP (for midmarket customers) programs. SAP Analytics Cloud has been reinforced as the consolidated analytics and FP&A offering for context-enriched decision making with SAP data.

Strengths

- SAP data and ecosystem integration: SAP Analytics Cloud offers seamless integration with SAP enterprise applications such as SAP S/4HANA, SAP SuccessFactors and SAP Ariba. With predefined data integration and data models, the product understands SAP business processes and retains the meaning and complete context of SAP data. Together with SAP Datasphere, SAP Analytics Cloud harmonizes and analyzes both SAP and non-SAP data into enriched semantic models.

- Decision-centric focus: SAP Analytics Cloud enables key influencer analysis, what-if modeling, simulation and predictive forecasting. It covers the closed-loop workflows and augmented planning process to finalize business decisions and actions. SAP Analytics Cloud's new compass module, planned for release this year, will add Monte Carlo simulation.

- Analytics accelerators for SAP business apps: SAP Analytics Cloud is part of a wider D&A portfolio that includes SAP Datasphere and offers prebuilt business content for various industries and lines of business online. It includes data models, data stories and visualizations, templates for SAP Digital Boardroom agendas, and guidance on using SAP data sources.

Cautions

- Average product capabilities: SAP Analytics Cloud is evaluated as average among all vendors for its product critical capabilities. While it is consistent from use case to use case, it doesn't really stand out in any one use case. Customers should evaluate SAP's product capabilities carefully to ensure functional fulfillment.

- Limited adoption outside of SAP ecosystem: SAP Analytics Cloud sells predominantly into its existing business application customers and legacy BI installed base. Customers without a SAP-centric application or data ecosystem rarely shortlist SAP Analytics Cloud, based on conversations with clients via the Gartner inquiry service.

- Cloud-only deployments: SAP Analytics Cloud is a public cloud-native platform (although it can query on-premises data and offer private tenants). Customers seeking an on-premises or private cloud deployment would need to leverage SAP BusinessObjects BI and support SAP Analytics Cloud and its analytics catalog functionality and Universe connector for a complete hybrid deployment experience. SAP Analytics Cloud and SAP BusinessObjects BI have different roadmaps, support and maintenance schedules.

SAS

SAS is a Visionary in this Magic Quadrant. Its visual analytics solution, SAS Visual Analytics, is one component of an end-to-end portfolio, SAS Viya, offering visual and augmented data preparation, ABI, DSML and AI solutions.

In 2023, SAS made significant improvements to SAS Viya's visual analytics capabilities. SAS made investments in Viya's cloud-enabled analytics engine, targeting improvements in user performance, productivity and increased trust in analytics. Strategic focus included enriching user workflows, so enabling collaboration across the D&A ecosystem. SAS Viya continues to embrace open architectures and open standards, empowering personas across the D&A ecosystem, with AI at the core.

Strengths

- AI core to the approach: In SAS Viya, SAS has placed AI capabilities at the core of its approach to analytics. AI and ML anchor automation in data preparation and analytics creation, improving user experience and time to solution for the analytics creator and consumer. These seamless improvements span the entire D&A life cycle, increasing productivity and accelerating time to value.

- Collaboration in a unified platform: SAS Viya offers prioritized collaboration in a unified platform, creating shared spaces where all personas (e.g., data scientists, analysts, engineers and consumers) can work together. SAS Viya also offers an individualized content hub with

cataloging of assets from a variety of different vendors and a clean low-/no-code user experience.

- Flexible open architecture: Foundational to SAS Viya's innovation strategy is "openness," enabling multiple language interfaces like SAS, Python, Lua, Java and R to be used on top of the same Viya computational engine. This strategy is core to not only enabling the collaboration mentioned above, but also to ensuring consistency and governance. SAS's continued investment in the capability to manage and deploy open-source models is unique and enables managing the entire model life cycle across multiple languages.

Cautions

- Pricing structure: SAS continues to struggle with providing transparency on its pricing structures, driven by bundling of analytics with other SAS products. Customers continue to raise concerns about lack of control over surprise incurred costs, and an inability to plan fully for future expected costs. SAS has worked to simplify pricing structures, but this hasn't necessarily made consumer decision making easier.

- Limited interoperability: SAS Viya has strong integration across Microsoft 365, but has an opportunity to expand interoperability to other competitor platforms. Many data integration options are available, but this is much less so for other BI platform content. Analytics catalogs of D&A assets from a variety of vendors' (including competitors') tools with automation and easy integration are becoming more and more sought after.

- Non-native cloud solution: Cloud is at the heart of SAS Viya's current strategy. SAS Viya has presented its share of challenges, particularly concerning the timing of SAS's transition in relation to market trends. As other cloud-native competitors like AWS, Microsoft Azure and GCP have gained traction, some leading-edge customers view their migrations to the cloud as opportune moments to explore alternative platforms. This shift has introduced complexities and, at times, contentious relationships as organizations weigh their options and evaluate the best path forward.

Sisense

Sisense is a Niche Player in this Magic Quadrant. Sisense supports both self-service augmented analytics and embedded use cases in a hybrid cloud environment. Its continued product investments support the increased demand for composable embedded analytics.

The current platform includes Fusion - Analytics as a Platform (APaaS). Sisense has continued to drive the composable analytics development experience by releasing Compose SDK, decoupling query composition, data exploration and visualization. Sisense has also included AI experiences throughout development and user consumption layers, leveraging LLMs and their metrics store for consistency across use cases.

Strengths

- Strong embedded offering: In 2023, Sisense continued the momentum of investment in embedded capabilities, releasing its code-first development kit, Compose SDK. Composability

has become an increasingly important factor of analytics delivery to connect consuming personas with analytics through multimodal channels.

- DevOps-first principles: To meet the needs of the developer persona and to integrate intelligence in applications, Sisense-native Git integration for DevOps bridges data engineering, analytics development tasks and application development in a consistent release management workflow, with granular file-level access possible through the Git server capabilities.

- Analytics discoverability: As analytics continue to be delivered by self-service and professional developers alike, solutions must provide analytics catalog capabilities to further enable business users making data-driven decisions. Sisense answers this need with robust UX capabilities, along with integrations into third-party data cataloging platforms.

Cautions

- Metrics layer accessibility: To realize the value of governed metrics environments, metrics must be accessible to a broad range of consuming endpoints. Sisense has invested in a common metrics layer in Fusion. However, it lacks accessibility outside the Sisense ecosystem.

- Lacks a surrounding data or application ecosystem: Momentum in the ABI platform market continues to shift toward cloud ecosystems, as well as to cloud-based business applications. Although Sisense is offered as a service, and interacts well with other cloud technologies, the platform lacks the competitive advantage that cloud and business application megavendors have in terms of market penetration.

- Community support: Based on Gartner Peer Insights aggregated scores, Sisense is below average in overall rating, willingness to recommend, and community support compared with its peers.

Spotfire

Spotfire is a Visionary in this Magic Quadrant. In last year's Magic Quadrant, Spotfire was referred to as TIBCO Spotfire. Spotfire combines visual analytics, data science and in-line data wrangling for analyzing at-rest and streaming data. Spotfire specializes in providing data scientists, engineers and analysts with a "point and click" UX to build and interact with visual data science applications rapidly.

In 2023, Spotfire introduced its own generative AI chatbot to offer product help, proprietary customer document context, code generation, autovisualization, report generation and data interrogation — all in natural language. In addition, Spotfire also published just under 200 Python functions as open source to enable fast creation of Spotfire data functions, cover time series and general ML pipeline functions, and to target specific vertical use cases.

Strengths

- Flexible deployment: The Spotfire platform can be deployed anywhere on-premises or in the cloud. Spotfire is designed to be fully cloud-agnostic, including both hybrid and multicloud options. Across all deployment options, it offers the same set of features and capabilities.

- Domain-specific applications: Spotfire supports prebuilt solution “accelerators” for specific industry use cases, like dynamic pricing accelerator, healthcare interoperability accelerator and continuous supply chain accelerator. In 2023, Spotfire continued creation of over 25 new custom visualizations enabled by the Spotfire Mods framework to allow building of process-/domain-specific applications or completely new products.

- Multipersona-centric platform: For business analysts, Spotfire provides interactive data visualization capabilities, including time series animation, geocoding and live animated maps with streaming data. It also offers robust data preparation features, such as visual representation of a data model as a pipeline and statistics on data distribution. For data scientists and citizen data scientists, Spotfire offers over 60 prebuilt interpreters for R and Python, along with prebuilt functions and guided model-building features.

Cautions

- Narrow vertical focus: While most of the vendors covered in this Magic Quadrant are widely deployed in many industries, Gartner typically sees Spotfire primarily in three verticals: life sciences and pharma, energy, and high tech manufacturing. The platform is broadly applicable to any industry, but customers in other industries should expect most of the user community to be focused on vertically specific use cases.

- High license cost: ABI buying decisions are now significantly influenced by price, due to downward pricing pressure led by large cloud providers. Gartner Peer Insights and customer inquiry reveal that some Spotfire customers cite high pricing and licensing inflexibility as inhibitors to large-scale deployments.

- Steep learning curve: Due to its focus on deep scientific use cases from a few industry verticals (e.g., life sciences, energy), taking advantage of the Spotfire platform often requires knowledge of statistics or other technical fields.

Tellius

Tellius is a Visionary in this Magic Quadrant. Tellius delivers insights using its “What?,” “Why?” and “How?” interfaces. “What?” insights are derived using an NLQ search interface. The “Why?” interface automatically surfaces hidden key drivers and trends. The “How?” interface identifies underlying segments and allows decision makers to act.

In 2023, Tellius introduced its own generative AI chatbot, allowing users to automate code creation and validation, generate metadata, visualizations, summaries and explanations. Furthermore, it increased its marketing focus in several industries and use cases, such as life science/pharma, consumer packaged goods (CPG), and supply chain.

Strengths

- Strong NLQ and automated insights: Tellius provides best-in-class automated insights features like key driver analysis, automated clustering, and personalized insights to enable self-service analytics and ad hoc exploration across large-scale data for different user personas. Tellius automated insights are designed to augment business and data analyst teams by leveraging

ML algorithms that employ ARIMA time regression, random forest, decision trees, variance analyses and other statistical techniques to highlight top drivers ranked in order of their statistical impact. Tellius is also an NLQ-first platform, with strong functionality in Q&A, suggestions, type ahead and synonyms. This year, Tellius has also improved its NLQ capabilities to work with semistructured data (like JSON or XML).

- Specific industry focus: In a crowded market, Tellius has managed to carve out its niche by doubling down on specific verticals such as pharma, retail, CPG, as well as horizontal functions like finance, HR, supply chain, marketing and sales. It provides starter templates and specific domain applications for quicker onboarding. This year, Tellius has also increased its industry-specific partnerships.

- Performance and scalability: Tellius can run both NLQ and automated insights in a direct query architecture. It supports multimodal data processing (live, in-memory, data lake) and autoscales to manage workload and consumption. It can handle ad hoc queries and AI/ML workloads. Tellius leverages Apache Spark for data processing of billions of rows of enterprise data. Tellius is built on microservices-based architecture, wherein each service can be scaled independently.

Cautions

- Reduced market momentum: Gartner Peer Insights, Gartner inquiries and search reveal slower market momentum for Tellius compared with other evaluated vendors. One major reason could be that this market is dominated by large cloud providers and ecosystem-centric vendors. Furthermore, Tellius lacks developer communities in community forums like Reddit and Stack Overflow.

- Product gaps: Tellius prioritizes augmented analytics features like NLQ and automated insights. However, it is significantly lacking in other capabilities like reporting, data storytelling and data visualization. It lacks support for formatted reports and also does not allow users to create infographics or connected slides.

- Emerging geographic strategy: Tellius is headquartered in the U.S., with three support centers in the U.S, one in Asia and one in Europe. While Tellius has customers distributed across the Americas, Europe and Asia, prospects should carefully evaluate the vendor’s ability to provide global support.

ThoughtSpot

ThoughtSpot is a Leader in this Magic Quadrant. Customers cite successful deployments, excellence in augmented analytics and composability for the modern data stack as reasons they selected ThoughtSpot. In addition, the acquisition of Mode Analytics has extended the vendor’s reach beyond the analytic content consumer to include more technical data analysts. ThoughtSpot has also significantly expanded the size of its customer base and provided an upselling opportunity.

Customers frequently cite ThoughtSpot’s consumer-friendly UX focus on a search experience for data storytelling, its ability to handle complex analysis and its scalability to analyze large datasets as reasons for purchase. ThoughtSpot offers ThoughtSpot Analytics as a vendor-managed SaaS,

customer-managed cloud and/or on-premises software, ThoughtSpot Embedded's embedded analytics software, and its Mode (acquisition) for SQL code-first analytics developers.

In 2023, ThoughtSpot launched Sage, a GenAI-enabled conversational analytics interface that enables native NLQ with human-in-the-loop feedback for accuracy. ThoughtSpot SpotIQ for automated insights has been revamped with a Monitor function for KPIs. Both Sage and SpotIQ run workloads via direct queries of databases to minimize data movement.

Strengths

- Visionary GenAI product strategy and NLQ capabilities: ThoughtSpot's vision is leading with a generative analytics experience for augmented analytics, SpotIQ for automated insights and data storytelling. ThoughtSpot's new Q&A experience and reasoning capabilities provide relevant and personalized suggestions/type-ahead, where users can crowd source synonyms. The AI is self-learning, enabled by Microsoft OpenAI GPT-4 model and Google Gemini.

- Modularity for the modern data stack: Composability has emerged this year as a differentiating capability for analytics-as-code developers. Key strengths for building custom analytics applications include: ThoughtSpot Embedded's embedded analytics software with APIs/SDKs/playground; CodeSpot samples and ThoughtSpot modeling language (TML); bring-your-own-model options; ThoughtSpot Sync action framework; and cloud-agnostic deployment flexibility, at scale.

- Successfully executing customer deployments: ThoughtSpot's strengths lie in delivering customer service, support and operations and experiences, according to Gartner Peer Insights reviewers.

Cautions

- Lacks a cloud or application ecosystem: In the fast-evolving SaaS landscape, many buyers prefer tools that integrate well with the D&A ecosystem of their business application or cloud platform provider, over those with unique features. Despite its cloud-agnostic approach and partnering — for example, with dbt Labs as a metrics layer, and Google Sheets, Excel and Slack integrations — ThoughtSpot's lack of an office suite, cloud infrastructure services, business applications (e.g., CRM/ERP) and other D&A products limits its sales strategy for enterprise adoption.

- Lacks data science integration and advanced data visualization: While ThoughtSpot is generally viewed as a best-of-breed ABI platform with strong differentiation, it still lags many vendors in certain capabilities, such as data science integration and advanced data visualization. These capabilities are present in Mode Analytics, but have yet to be integrated into the rest of the ThoughtSpot products.

- Sustaining product uniqueness in a post-GenAI landscape: ThoughtSpot is now near the top of the market for AI enablement across capabilities, while reestablishing excellence in NLQ and strength in reporting features. However, this differentiation will be tough to sustain as virtually all

ABI platform vendors are now focused on adding NLQ capabilities through the integration of LLMs.

Zoho

Zoho is a Niche Player in this Magic Quadrant. Zoho Analytics is mainly focused on data preparation, data visualization and its marketplace of prebuilt analytical apps for business analysts. Zoho's operations are geographically diversified and its clients tend to be small to midsize companies.

In 2023, Zoho expanded its capabilities by integrating with OpenAI to introduce GenAI functionalities, further enhancing its service offerings. Additionally, Zoho launched Code Studio, a platform designed to foster a professional coding environment tailored for developers. In an effort to streamline user experience, Zoho has also upgraded its analytics catalog. This enhanced platform now supports third-party ABI platforms, providing users with a unified interface for a more seamless interaction.

Strengths

- Line-of-business (LOB) analytics: Zoho Analytics provides users with the ability to amalgamate data from a diverse array of LOB applications. It boasts a substantial library of preconstructed reports and dashboards, each tailored to specific industry domains. Leveraging its intelligent data blending functionality, users can seamlessly integrate data across various LOB applications, thereby delivering comprehensive business insights with augmented analytics from end to end.

- Composable analytics: Zoho Analytics features a flexible microservices architecture that supports deployment on preferred cloud providers like AWS, Microsoft Azure and GCP, as well as on-premises. Its marketplace approach allows users with minimal to no coding experience to utilize prebuilt content, such as Shopify for e-commerce analytics.

- Ecosystem opportunities: Zoho's 100 million SaaS users, with more than 50 business applications, facilitate rapid adoption of Zoho Analytics. The platform's seamless integration with other Zoho apps enhances its position in enabling decision intelligence. This is amplified by its integration with business applications and its strength in collaboration, a key capability to achieve collaborative intelligence.

Cautions

- Zoho ABI focus: Compared with other established vendors in the market, Zoho demonstrates relatively subdued market momentum with Zoho Analytics. As a substantial enterprise, Zoho maintains a limited sales force dedicated to Zoho Analytics, indicating a less pronounced strategic positioning of its ABI offering.

- Lack of advanced analytics deployments: While it has added data science integration features, including a coding environment — Code Studio — where users can build ML models, data integrations and data transformations in Python, our research indicates that Zoho is mainly used for self-service business analysis.

- Product capability gap: The product capabilities of Zoho Analytics continue to lag those of the majority of vendors evaluated in this Magic Quadrant assessment.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors were added to the 2024 Magic Quadrant.

Dropped

No vendors were dropped from the 2024 Magic Quadrant.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, vendors had to meet both of the following criteria:

- Offer a generally available software product that met Gartner’s definition of an ABI platform:

- Analytics and business intelligence platforms enable less-technical users — including business people — to model, analyze, explore, share and manage data, and collaborate and share findings, enabled by IT and augmented by AI. The platforms may optionally include the ability to create, modify or enrich a semantic model, including business rules.

- Rank among the top 20 organizations in the Customer Interest Indicator defined by Gartner for this Magic Quadrant. Data inputs used to calculate ABI platform market momentum included a balanced set of measures:
  - Gartner customer search and inquiry volume and trend data.
  - Volume of job listings specifying the ABI platform on TalentNeuron and on a range of employment websites in the U.S., Europe and China.
  - Frequency of mentions as a competitor to other ABI platform vendors in reviews on Gartner’s Peer Insights.
  - Social media communities and overall trends.

In line with Gartner’s Magic Quadrant methodology, the number of vendors covered is limited to 20. There are many more ABI platform vendors that are not covered in this research.

Honorable Mentions

Here are some other vendors to consider. Some are tangential to the ABI platform market. Others are comprehensive ABI platforms but did make the top 20 of the customer interest index, which is an inclusion requirement for this Magic Quadrant.

- Aible. Aible offers several products, including Sense, Explore and Optimize, to use AI to automate data engineering, data analytics and data science tasks. Aible ensures data is of sufficient quality to generate insights, discover patterns in the data and make recommendations.
- AnswerRocket. AnswerRocket offers an augmented analytics platform for data exploration, analysis and insights discovery. It allows users to monitor key metrics, identify performance drivers and detect critical issues within seconds. AnswerRocket's latest release harnesses OpenAI's ChatGPT technology to enable conversational analytics on proprietary data.
- AtScale. AtScale provides a semantic layer platform that connects data consumers using common BI tools with data assets managed in cloud data platforms. AtScale also provides a data modeling utility that lets data teams build semantic models, design metrics and conformed dimensions that are published within a metrics store accessible from BI platforms.
- Board. Board differentiates itself by providing an intelligent planning platform (analytics and FP&A) that supports business processes more fully than vendors of competing ABI products aim to.
- Dbt. Dbt provides a consistent, governed metrics layer that works with a variety of ABI platforms. Its offering goes beyond the metrics layer to enable analytic developers to build data models, track changes and deploy models across a distributed environment.
- FanRuan Software. FanRuan is one of the largest ABI vendors in China, where its traditional, report-centric BI product, FineReport, is widely used. FanRuan's new FineBI product offers self-service, visually driven BI via an on-premises deployment model.
- iGenius. iGenius is an AI-based analytics company, also covered in the Gartner Market Guide for Augmented Analytics. iGenius uses AI to automate much of the analysis and presentation of data, making it easier to consume.
- Yellowfin. Yellowfin is one of the leading data storytelling vendors. Yellowfin's collaboration tools enable stories and presentations to be co-created by multiple contributors. Yellowfin has also added augmented and NLG capabilities to automate the process of creating data stories.

Evaluation Criteria

The Ability to Execute criteria used in this Magic Quadrant are as follows (for the sources of information that informed Gartner's evaluations using these criteria, see the Evidence section):

- Product or Service: This criterion assesses how competitive and successful a vendor's ABI platform product is with regard to the critical capability areas, in light of the vendor's RFP response and video submission.

- Overall Viability: This criterion concerns the organization's financial status and model as it relates to ABI. It also takes account of existing and prospective customers' views about the vendor's likely future relevance.
- Sales Execution/Pricing: This criterion covers the vendor's capabilities in sales activities. It includes the overall evaluation and contract negotiation/flexibility with a vendor as well as the value the customer receives.
- Market Responsiveness/Record: This criterion addresses the extent to which a vendor has momentum and success in the worldwide market using a balanced set of measures.
- Customer Experience: This criterion concerns customers' experience of working with a vendor after a purchase. Factors include the availability of quality third-party resources (such as integrators and service providers), the quality and availability of end-user training, and the quality of the peer user community.
- Operations: This criterion concerns how well a vendor supports its customers, and how trouble-free its software is.

Ability to Execute

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	***Weighting*** ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	NotRated
Customer Experience	High
Operations	High

Evaluation Criteria ↓	Weighting ↓

Source: Gartner (June 2024)

The Completeness of Vision criteria used in this Magic Quadrant are as follows (for the sources of information that informed Gartner's evaluations using these criteria, see the Evidence section):

- Market Understanding: This criterion concerns how closely aligned a vendor is with the shifting needs of analytic buyers and how widely its customers use recent and emerging capabilities.
- Marketing Strategy: This criterion considers whether a vendor has a clear set of messages that communicate its value and differentiation in the ABI platform market, and whether that vendor is generating awareness of its differentiation.
- Sales Strategy: This criterion concerns the extent to which a vendor's sales approach benefits from a range of options and drivers that encourage customers to evaluate its ABI platform.
- Offering (Product) Strategy: Gartner evaluates a vendor's ability to support key trends that will create business value in future. Existing and planned products and functions that contribute to these trends are factored into each vendor's score for this criterion, based on its presented roadmap.
- Vertical/Industry Strategy: This criterion assesses how well a vendor can meet the needs of various industries through templates or packaged data and analytics content.
- Innovation: This criterion gauges the extent to which a vendor is investing in, and delivering, unique capabilities. It considers whether a vendor is setting standards for innovation that others are emulating.
- Geographic Strategy: This criterion considers how well-represented a vendor is around the world.

Completeness of Vision

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	High

Evaluation Criteria ↓	*Weighting* ↓
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	NotRated
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Medium

Source: Gartner (June 2024)

Quadrant Descriptions

Leaders

Leaders demonstrate a solid understanding of the key product capabilities and the commitment to customer success that buyers in this market demand. They couple this understanding and commitment with an easily comprehensible and attractive pricing model that supports proof of value, incremental purchases and enterprise scale. Buying decisions are made, or at least heavily influenced, by business users who demand products that are easy to buy and use. Business users require these products to deliver clear business value and enable the use of powerful analytics by those with limited technical expertise and without upfront involvement from the IT department or technical experts. In a rapidly evolving market featuring constant innovation, Leaders do not focus solely on current execution. Leaders ensure they have a robust roadmap to solidify their market position and thus help protect buyers' investments.

Challengers

Challengers are well-positioned to succeed in this market. However, they may be limited to specific use cases, technical environments or application domains. Their vision may be hampered by the lack of a coordinated strategy across various products in their portfolio. Alternatively, they

may fall short of the Leaders in terms of effective marketing, sales channels, geographic presence, industry-specific content and innovation.

Visionaries

Visionaries have a strong or differentiated vision for delivering a modern ABI platform. They offer deep functionality in the areas they address. However, they may have gaps when it comes to fulfilling broader functionality requirements or they may have lower scores for customer experience, operations and sales execution. Visionaries are thought leaders and innovators, but they may be lacking in scale, or there may be concerns about their ability to grow and still execute consistently.

Niche Players

Niche Players do well in a specific domain (industry, vertical or use case), or they are good at meeting the ABI needs of organizations using a particular cloud stack. But they may have limited ability to surpass other vendors in terms of innovation or performance. They may focus on a specific domain or aspect of the ABI platform market, but lack deep functionality elsewhere. Alternatively, they may have a reasonably broad ABI platform, but limited implementation and support capabilities or relatively limited customer bases (in only a specific region or industry, for example).

Context

This Magic Quadrant assesses vendors' capabilities on the basis of their execution in 2023 and future development plans. As vendors and the market are evolving, the assessments may be valid for only one point in time.

Readers should not use this Magic Quadrant in isolation as a tool for selecting vendors and products. They should treat it as one reference point among the many required to identify the most suitable vendor and product. When selecting a platform, they should use this Magic Quadrant in combination with

Critical Capabilities for Analytics and Business Intelligence Platforms. We also recommend using Gartner's client inquiry service.

Readers should not ascribe their own definitions of Completeness of Vision or Ability to Execute to this Magic Quadrant (they often incorrectly equate these with product vision and market share, respectively). The Magic Quadrant methodology uses a range of criteria to determine a vendor's position, as shown by the Evaluation Criteria section above.

Market Overview

There was a major change in focus this year. Analytics and BI platforms traditionally have a visual drag-and-drop design interface. While this is still true, most vendors are now building a more conversational, text-based design interface where users simply type what type of reports they would like to see. These requests are still integrated with the ABI platform's query language and semantic layer, but with a more natural language interface based on generative AI and large language models to deliver a new report, data pipeline or query result.

The presence of the major cloud ERP and CRM application providers is also an influencer of ABI platform selection considerations. On one hand, cloud-led sourcing creates inevitable concerns about lock-in and unforeseen costs of the data and analytics portfolio. On the other, the cloud service providers accept the importance of openness in their software stacks and the growing importance of “multicloud” approaches, whereby organizations run applications in, and across, multiple cloud offerings.

Currently, one vendor — Microsoft — dominates the market in terms of user adoption. The massive growth of the Microsoft Power BI cloud service has continued, fueled largely by the bundling of this product with Microsoft 365 (at E5 license level) at a greatly reduced price. The increasing integration of Power BI with Microsoft Teams fuels further growth, given the importance of remote working.

The dedicated, specialist analytics vendors in the ABI platform market are using their independence from the big cloud providers as competitive differentiators, playing on customers’ lock-in concerns. These vendors tend to focus on finding specific market segments and matching offerings to their needs.

The market is continuously evolving, with many platforms adding capabilities for citizen analysts/developers to easily compose low-code or no-code automation workflows and applications. This blend of capabilities is helping to expand the vision for analytics beyond simply delivering datasets and presenting dashboards, to delivering enriched contextualized insights. This has refocused attention on the decision-making processes and, ultimately, on taking actions that deliver business value.

Evidence

Gartner’s analysis in this Magic Quadrant is based on sources that include:

- Gartner analysts’ opinions of vendors.
- Customers’ perceptions of vendors’ strengths and challenges, drawn from ABI-related inquiries received by Gartner.
- Gartner Peer Insights data (see below).
- A questionnaire completed by vendors about their business.
- Vendor briefings covering differentiation, customer use cases and product roadmaps.
- An extensive RFP questionnaire inquiring how each vendor delivers the specific features that make up the 12 critical capabilities defined for this market.
- Video demonstrations of how vendors’ ABI platform products address the 12 critical capabilities profiled in the companion Critical Capabilities for Analytics and Business Intelligence Platforms.
- Externally sourced data on market momentum (e.g., job postings, videos on the web).

Gartner Peer Insights

Gartner Peer Insights reviews were considered for metrics relating to operations (service and support, and quality of technical support), customer experience (availability of third-party resources, quality/availability of end-user training, and overall experience), sales experience (pricing and contract negotiation), market responsiveness (value received) and market understanding (understanding customer needs).

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Expérience client : relations, produits et services/programmes qui permettent aux clients de réussir avec les produits évalués. Plus précisément, cela inclut la manière dont les clients reçoivent une assistance technique ou une assistance pour leur compte. Cela peut également inclure des outils auxiliaires, des programmes de support client (et leur qualité), la disponibilité des groupes d'utilisateurs, des accords de niveau de service, etc.

Opérations : capacité de l'organisation à atteindre ses objectifs et ses engagements. Les facteurs comprennent la qualité de la structure organisationnelle, y compris les compétences, les expériences, les programmes, les systèmes et autres véhicules qui permettent à l'organisation de fonctionner de manière efficace et efficiente sur une base continue.

Intégralité de la vision

Compréhension du marché : capacité du vendeur à comprendre les désirs et les besoins des acheteurs et à les traduire en produits et services. Les fournisseurs qui font preuve du plus haut degré de vision écoutent et comprennent les désirs et les besoins des acheteurs, et peuvent les façonner ou les améliorer grâce à leur vision supplémentaire.

Stratégie marketing : un ensemble de messages clairs et différenciés, communiqués de manière cohérente dans toute l'organisation et externalisés via le site Web, la publicité, les programmes clients et les déclarations de positionnement.

Stratégie de vente : stratégie de vente de produits qui utilise le réseau approprié de filiales de vente directe et indirecte, de marketing, de service et de communication qui étendent la portée et la profondeur de la portée du marché, des compétences, de l'expertise, des technologies, des services et de la clientèle.

Stratégie d'offre (produit) : approche du fournisseur en matière de développement et de livraison de produits qui met l'accent sur la différenciation, les fonctionnalités, la méthodologie et les ensembles de fonctionnalités en fonction des exigences actuelles et futures.

Modèle commercial : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

Stratégie verticale/industrielle : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques de segments de marché individuels, y compris les marchés verticaux.

Innovation : Agencements directs, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, défensives ou préventives.

Stratégie géographique : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques en dehors du « domicile » ou de la zone géographique d'origine, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, en fonction de cette zone géographique et de ce marché.

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