ATSCALE

2018 BIG DATA MATURITY SURVEY

Brought to you by Atscale

What you need to know

1. OVERCONFIDENCE

In 2018, **78% of respondents rank their big data maturity as "medium or high."** In reality and per our methodology, in 2018, only 12% have a high-level of maturity (up from 8% in 2016).

2. SILOED THINKING

55% of respondents still are dealing with a siloed, decentralized analytics team. Online and utilities players are leading with centers of excellence while financial services and telecommunications are lagging.

3. SELF-SERVICE CHALLENGES

59% of respondents have deployed big data in the cloud (up from 53% last year). This has disrupted their end-users' ability to access data: **self-service access is at 42%, down from 47% last year** and back to 2016 levels (41%). **Governance is big data leaders' top concern in 2018** as tools and platforms proliferate in the enterprise.

4. CLOUD IS TAKING CENTER-STAGE

77% of respondents are projecting they would use the cloud for big data, with Google BigQuery making its foray into the scene. While over 40% of respondents would consider a cloud option over on-premise, 11% of surveyed are planning on putting Google BigQuery in production while **65% of respondents are still investigating BigQuery.**

5. THE POWER OF MICROSOFT POWERBI

When asked what their BI tool of choice was for big data, respondents' top three were: Tableau, Microsoft Excel and PowerBI. **PowerBI went from 7th to 3rd place in one year.** It took BOBJ from the podium in 2017 (BOBJ had dethroned 2016's #3 MicroStrategy).
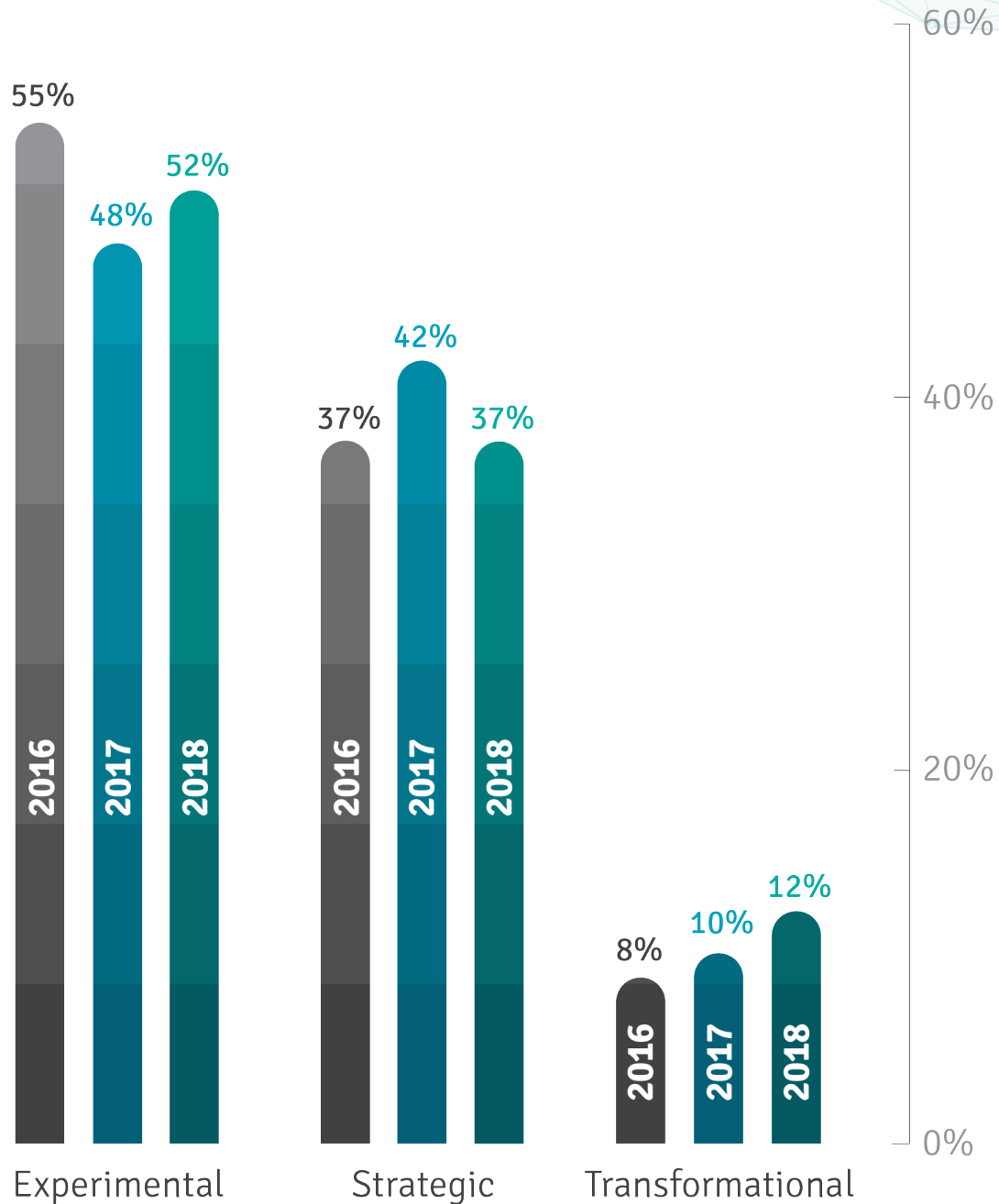
6. CONTINUED MOMENTUM

Just like last year, 95%+ of respondents will do as much or more with big data in the next three months. **Only 17% of respondents consider big data as an experiment (lowest levels in two years).**
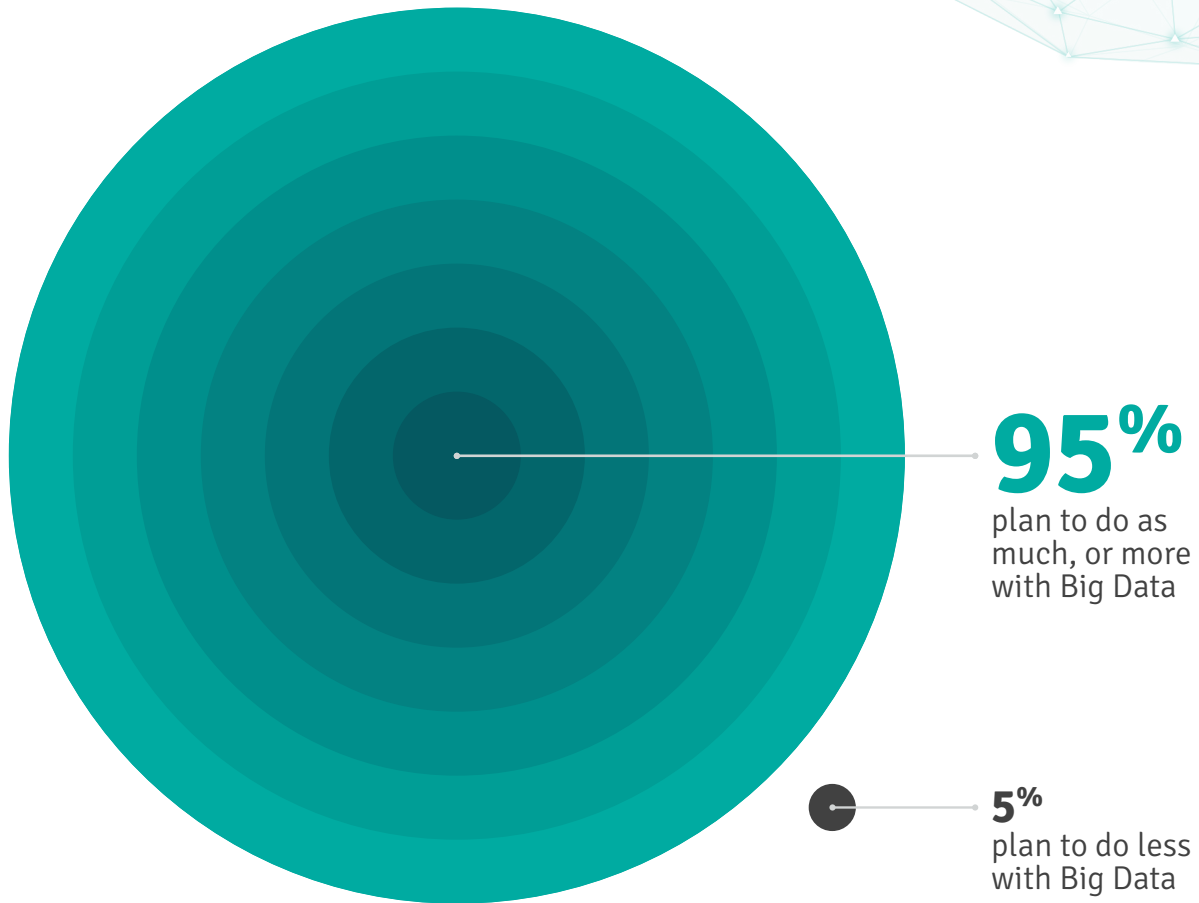
AUDIENCE METRICS
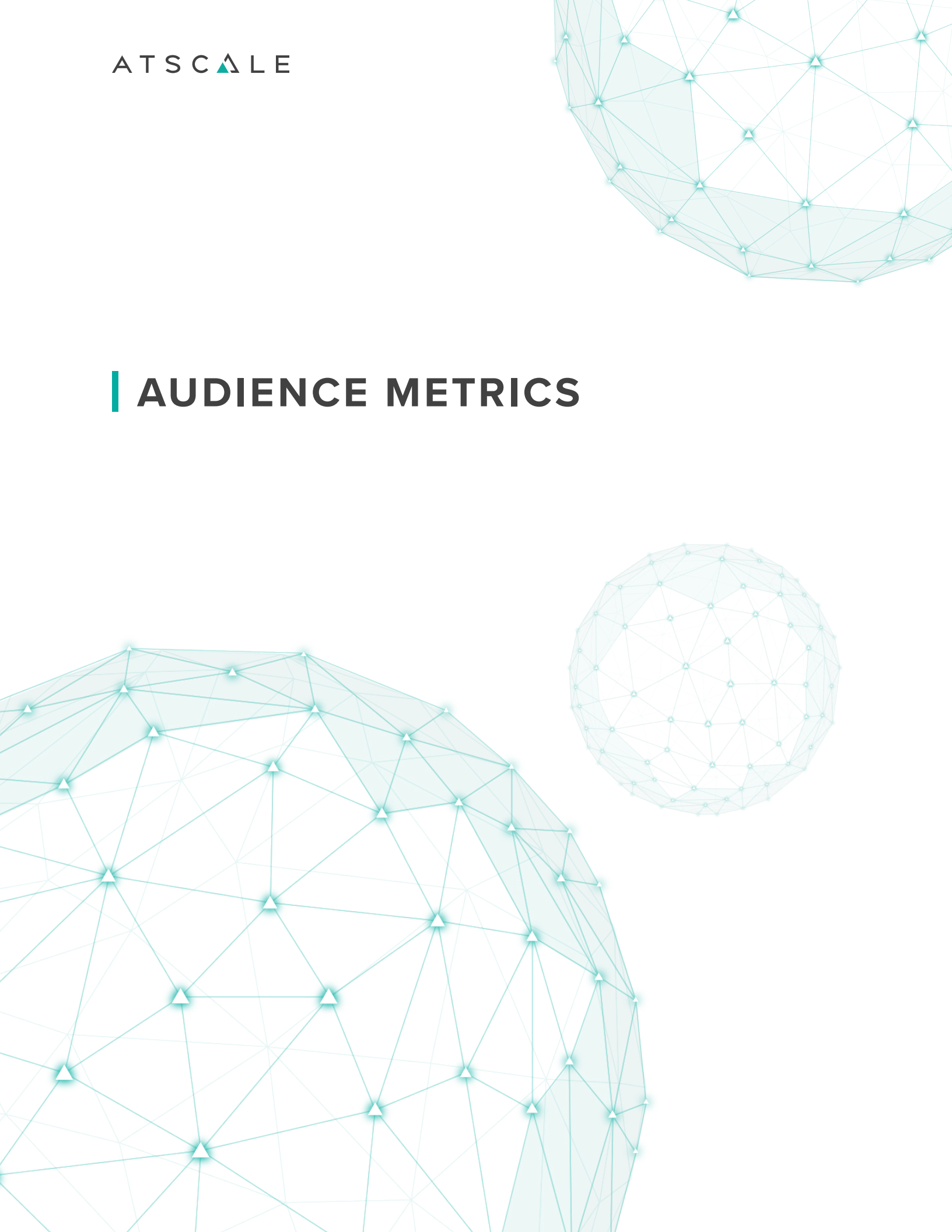
Maturity Evolution: 2016-2018

Do you think you will do more or less with big data in the next three months?

95%
plan to do as much, or more with Big Data

5%
plan to do less with Big Data

## 5,593 respondents over three years

Responses collected in collaboration with Cloudera, Hortonworks, MapR, Tableau and new in 2018: ODPi (a project of the Linux Foundation).

**All industries represented across the globe.
From financial services to utilities.
From Canada to Kenya.**

Key Insight

95% will do as much, or more, with big data **in the next three months.**

What is the role of big data in your organization?

34%
Experimental & Tactical

66%
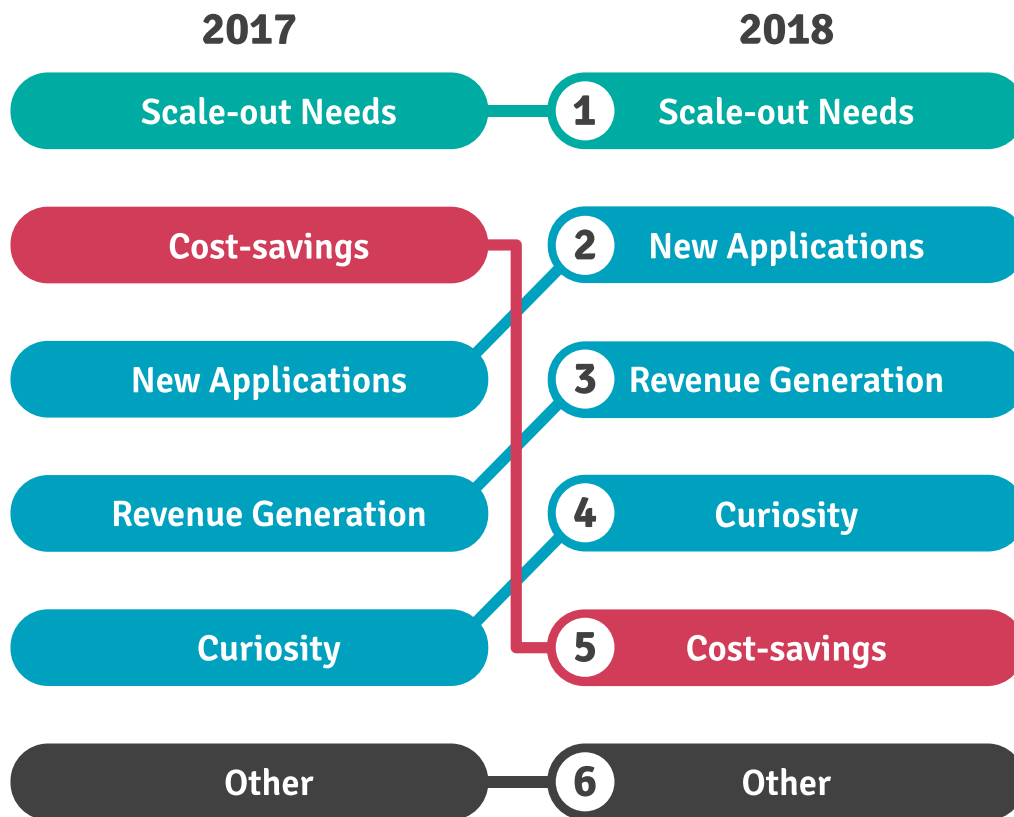Strategic & Game-changing
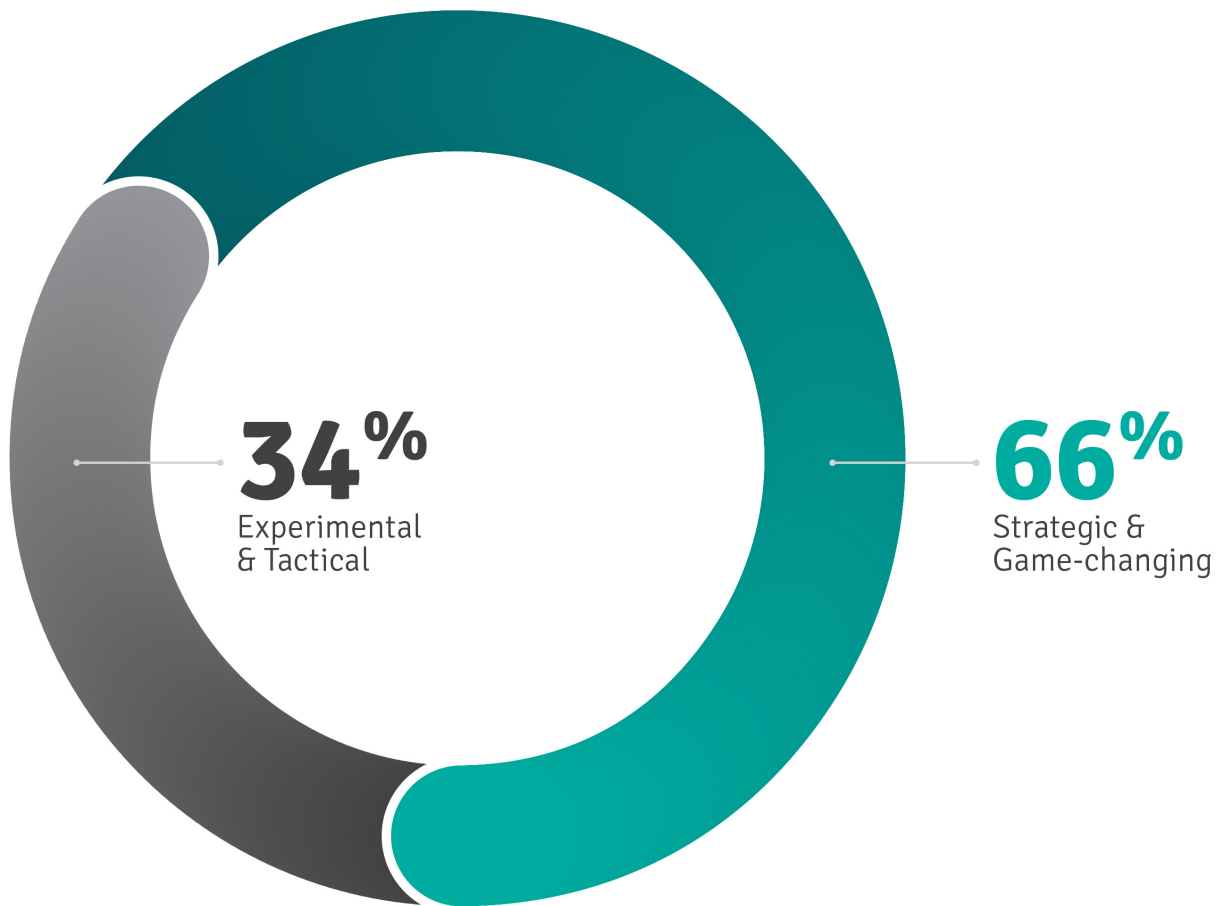
Key Insights

66% consider big data "strategic" or "game-changing."

Only 17% of respondents consider big data as an experiment (lowest levels in 2 years).

What is the primary reason that would lead your organization to adopt Hadoop?

2017 **2018**

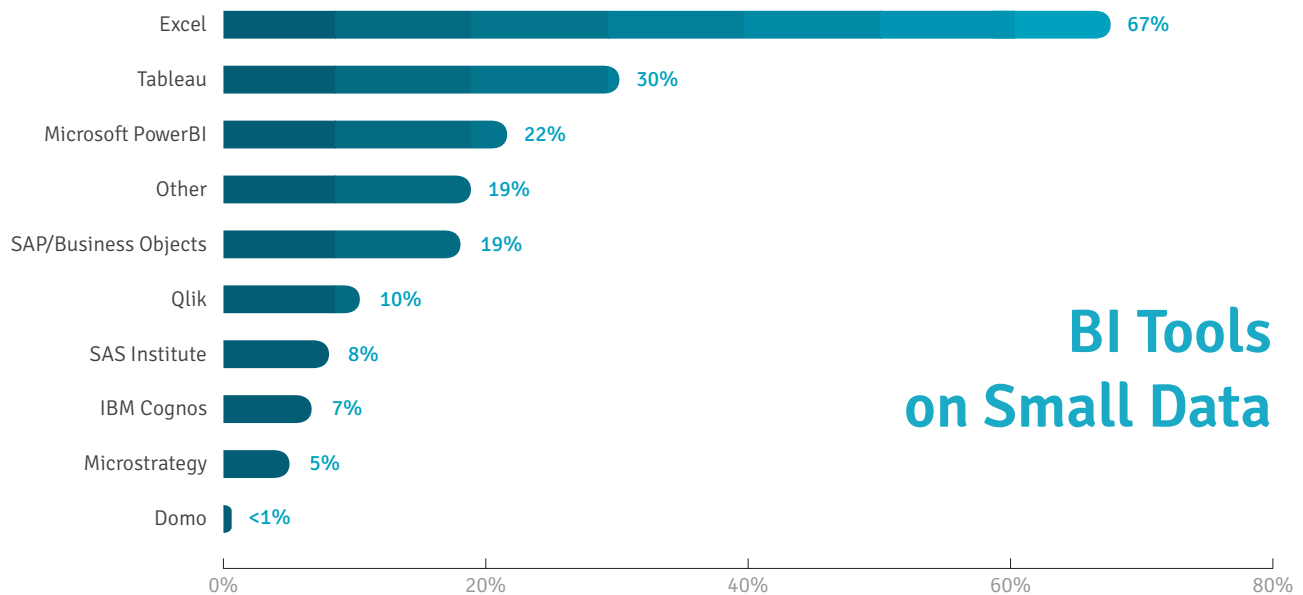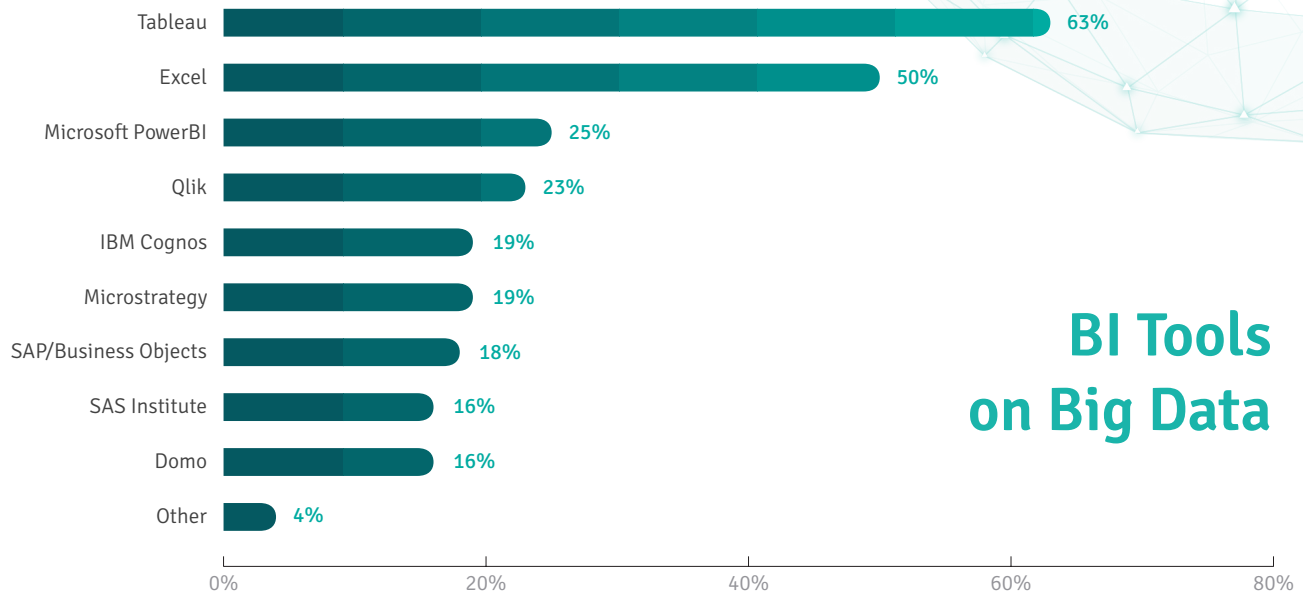| 2017		2018
Scale-out Needs	1	Scale-out Needs
Cost-savings	2	New Applications
New Applications	3	Revenue Generation
Revenue Generation	4	Curiosity
Curiosity	5	Cost-savings
Other	6	Other

Key Insights

Cost Savings **drops to position #5.**

Revenue generation and curiosity **moved up by one.**

BUSINESS INTELLIGENCE TOOLS
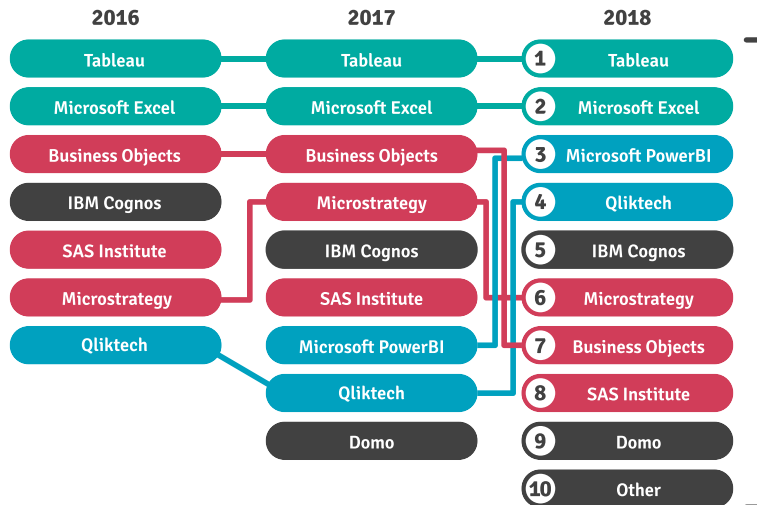
The Power of Microsoft BI

BI Tools on Big Data

Tool	%
Tableau	63%
Excel	50%
Microsoft PowerBI	25%
Qlik	23%
IBM Cognos	19%
Microstrategy	19%
SAP/Business Objects	18%
SAS Institute	16%
Domo	16%
Other	4%

BI Tools on Small Data

Tool	%
Excel	67%
Tableau	30%
Microsoft PowerBI	22%
Other	19%
SAP/Business Objects	19%
Qlik	10%
SAS Institute	8%
IBM Cognos	7%
Microstrategy	5%
Domo	<1%

Key Insights

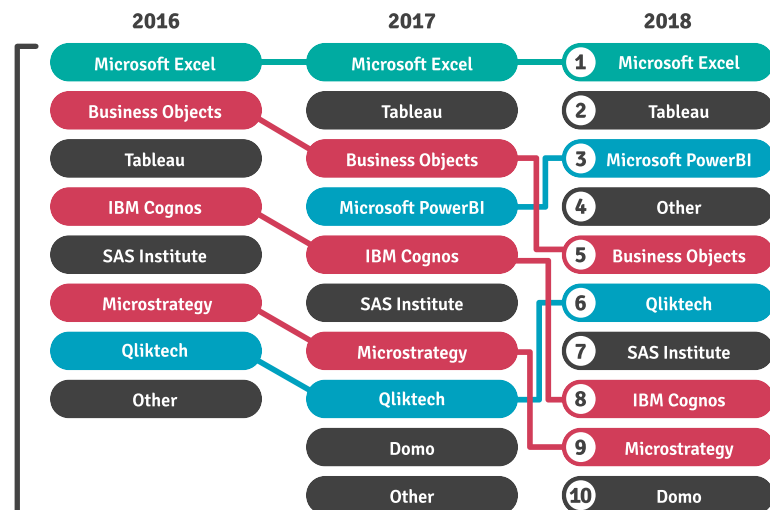**Microsoft Business Intelligence** (PowerBI and Excel) are having the most impact in this market.

Tableau is maintaining a strong position on big data but companies like **MicroStrategy, IBM Cognos and SAP BOBJ seem to decline both on small and big data.**

When things change, do they stay the same?

Have big data

2016	2017	2018
Tableau	Tableau	1 Tableau
Microsoft Excel	Microsoft Excel	2 Microsoft Excel
Business Objects	Business Objects	3 Microsoft PowerBI
IBM Cognos	Microstrategy	4 Qliktech
SAS Institute	IBM Cognos	5 IBM Cognos
Microstrategy	SAS Institute	6 Microstrategy
Qliktech	Microsoft PowerBI	7 Business Objects
	Qliktech	8 SAS Institute
	Domo	9 Domo
		10 Other

Don't have big data

2016	2017	2018
Microsoft Excel	Microsoft Excel	1 Microsoft Excel
Business Objects	Tableau	2 Tableau
Tableau	Business Objects	3 Microsoft PowerBI
IBM Cognos	Microsoft PowerBI	4 Other
SAS Institute	IBM Cognos	5 Business Objects
Microstrategy	SAS Institute	6 Qliktech
Qliktech	Microstrategy	7 SAS Institute
Other	Qliktech	8 IBM Cognos
	Domo	9 Microstrategy
	Other	10 Domo

Key Insights

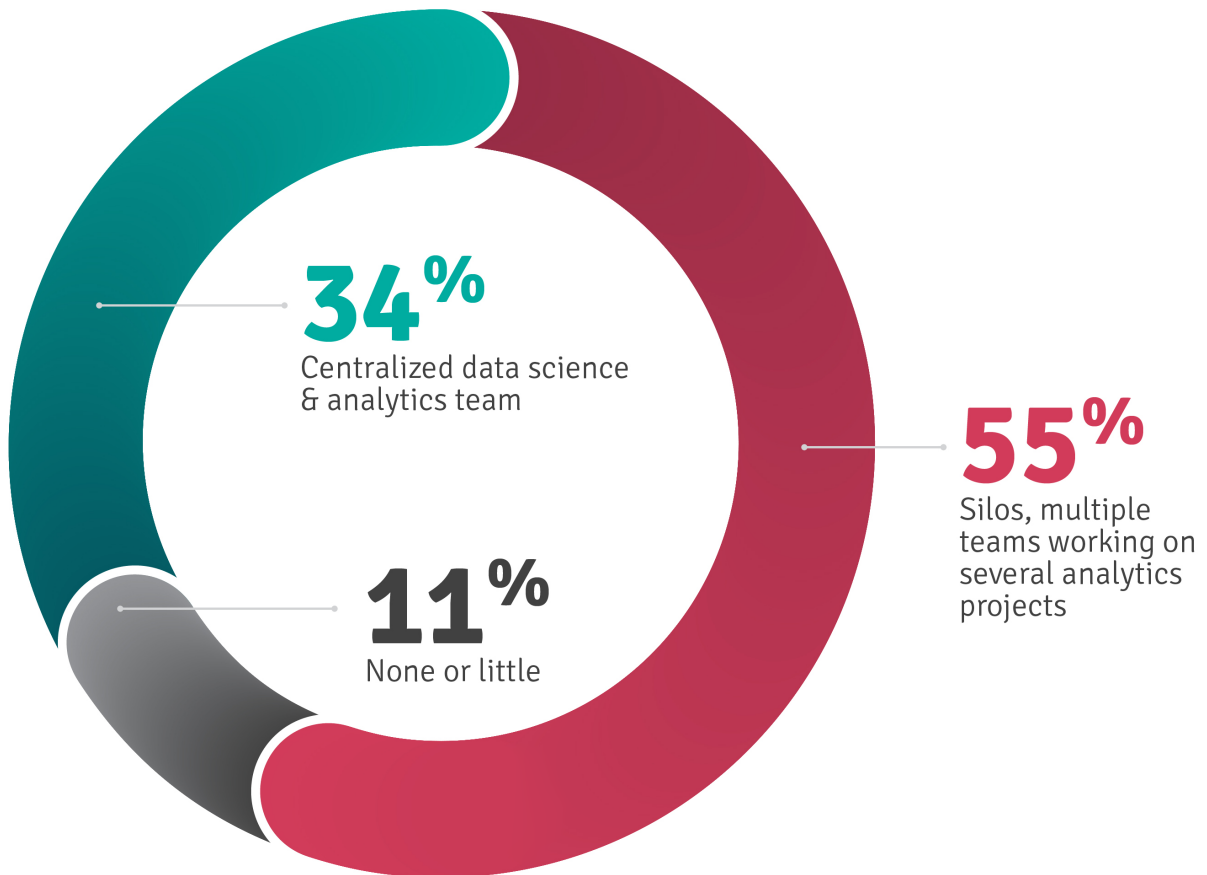**Tableau** maintains the #1 spot on big data. **Microsoft Excel** maintains the #1 spot on small data.

Biggest gainer is **Microsoft PowerBI** across both dimensions (+4 on big data, +1 on small data).

Biggest recovery is **Qliktech** (+4 on big data, +2 on small data).

BusinessObjects/SAP loses the most ground, along with **MicroStrategy** and **IBM Cognos.**

SILOED ANALYTICS EFFORTS

ATSCALE

How do you approach your data strategy?

34% Centralized data science & analytics team

55% Silos, multiple teams working on several analytics projects
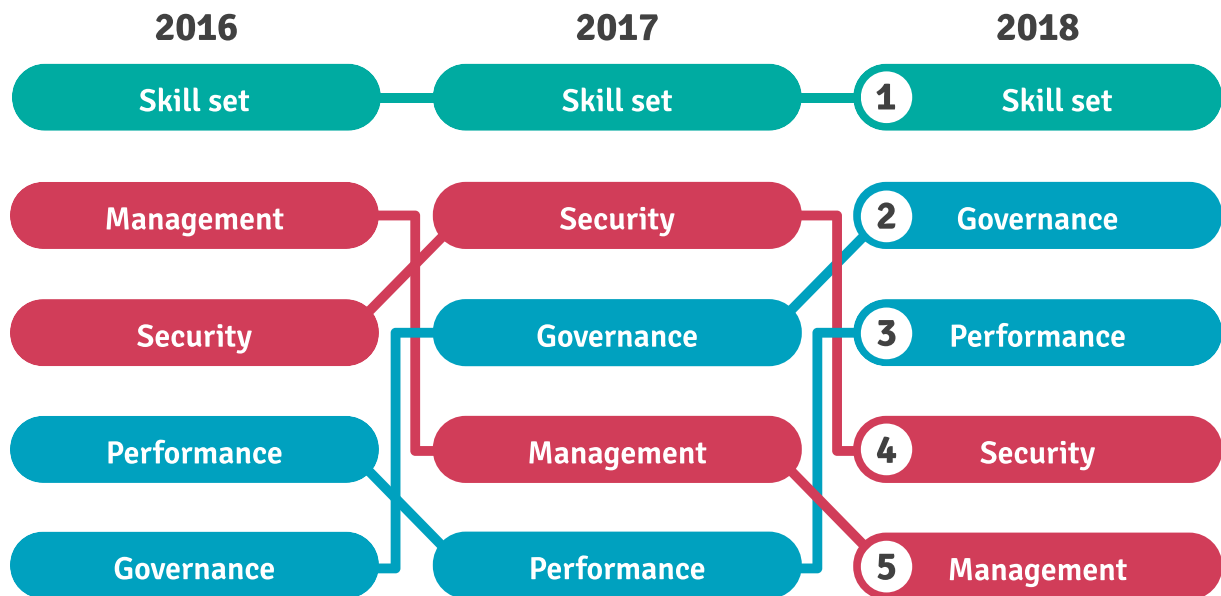
11% None or little

Key Insights

The most decentralized industries are **telecommunication and financial services.**

The most centralized industries are **utilities and online.**

What challenges are you experiencing with big data?

2016	2017	2018
Skill set	Skill set	1 Skill set
Management	Security	2 Governance
Security	Governance	3 Performance
Performance	Management	4 Security
Governance	Performance	5 Management

Key Insights

Although security seems to decline as a top concern for big data, **governance jumped to #2 from #5 in two years.**

Enterprises thought performance was handled, but in 2018, **cloud platforms introduced new challenges causing them to pay closer attention to performance.**

Management seems to have been put to the background **as cloud platforms take away some of big data management issues.**
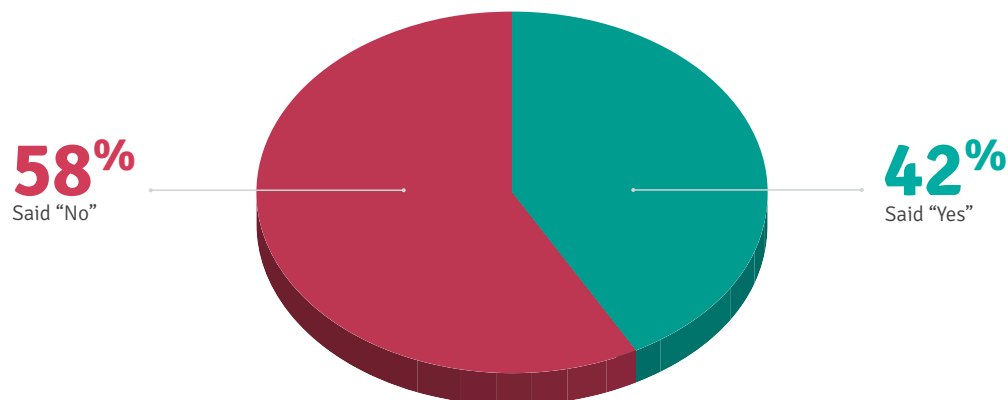
THE CLOUD

How much of your current big data deployment is in the cloud?
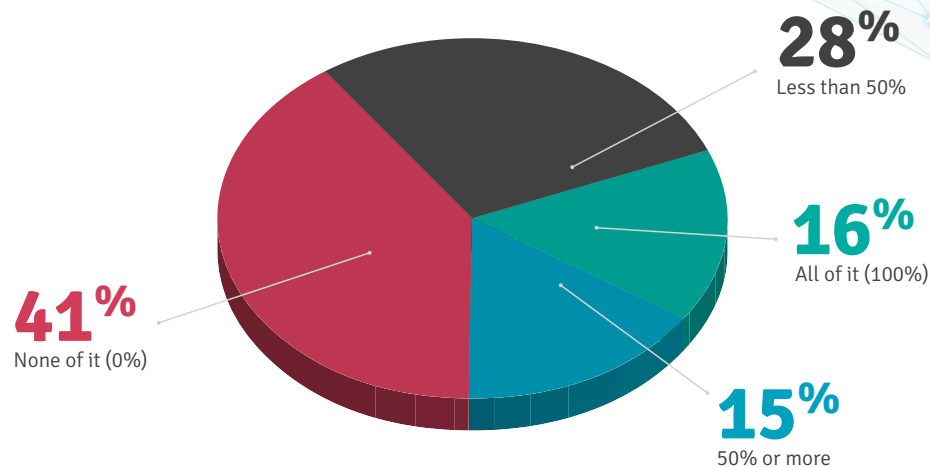
28%
Less than 50%

16%
All of it (100%)

41%
None of it (0%)

15%
50% or more

Do business units have self-service access to big data?
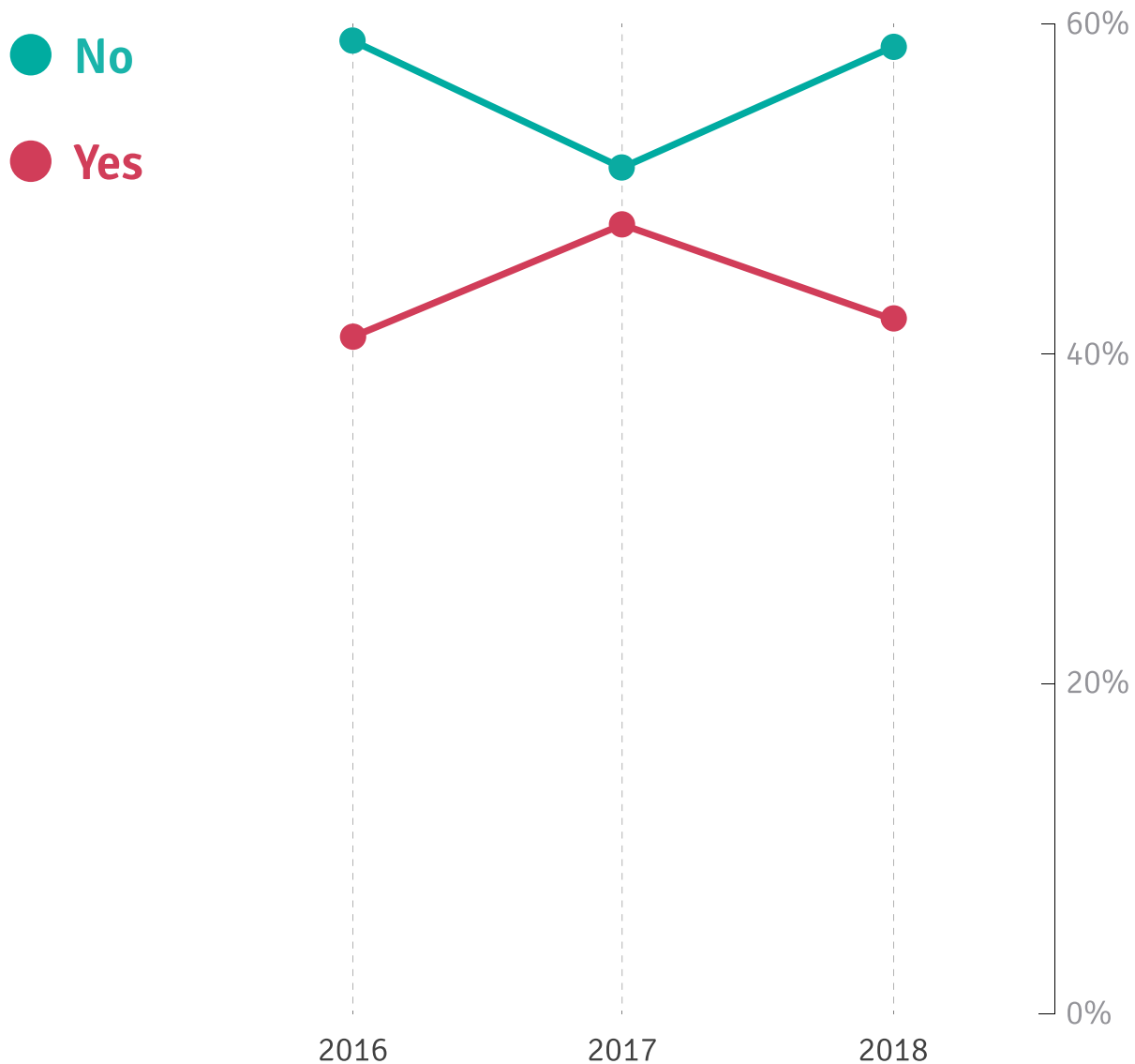
58%
Said "No"

42%
Said "Yes"

Key Insights

59% have deployed big data in the cloud, up from 53% last year, but...

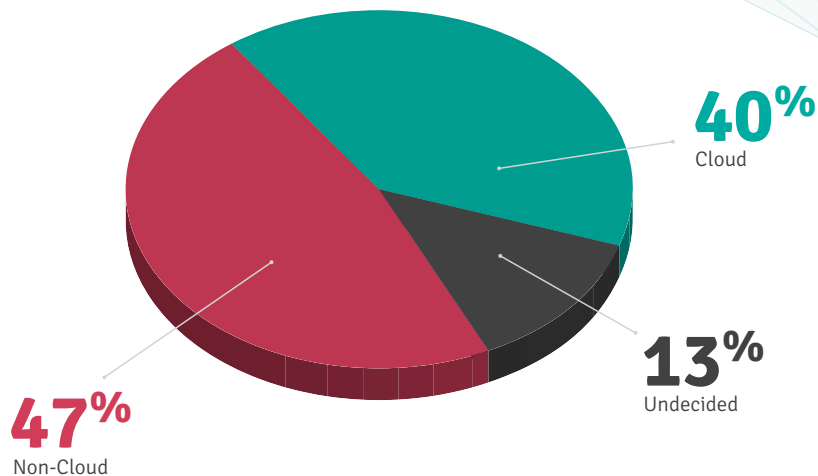**42% have self-service access,** down from 47% last year (2016: 41%)

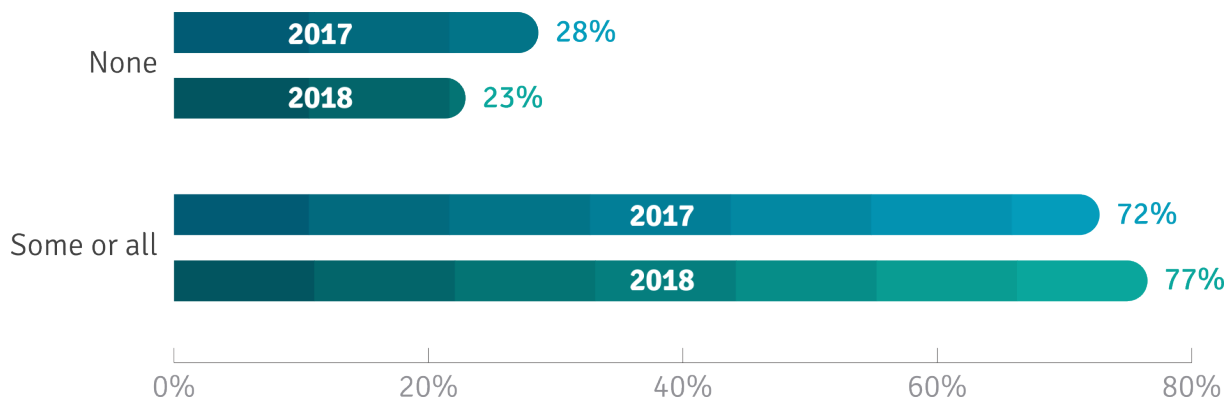# Do business units have self-service access to big data?

No

Yes

60%

40%

20%

0%

2016   2017   2018

Question Posed

Is cloud migration distracting from self-service?

ATSCALE

Which deployment type would you choose for big data?

40%
Cloud

47%
Non-Cloud

13%
Undecided

How much of your big data deployment will be in the cloud?

None
2017 — 28%
2018 — 23%

Some or all
2017 — 72%
2018 — 77%

0%   20%   40%   60%   80%

Key Insights

59% have deployed big data in the cloud, up from 53% last year, but...

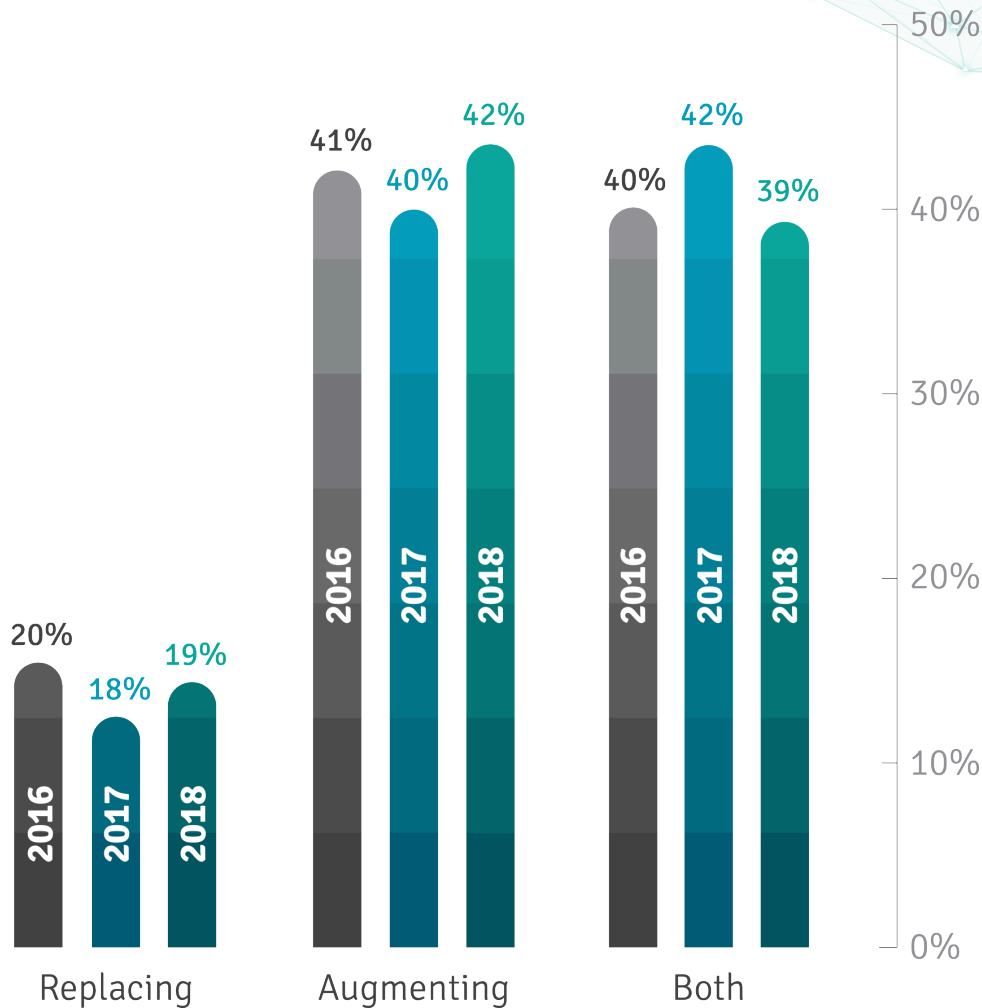**42% have self-service access,** down from 47% last year (2016: 41%)

Are you planning on going into production using Google's BigQuery?

24%
No

65%
Unsure

11%
Yes
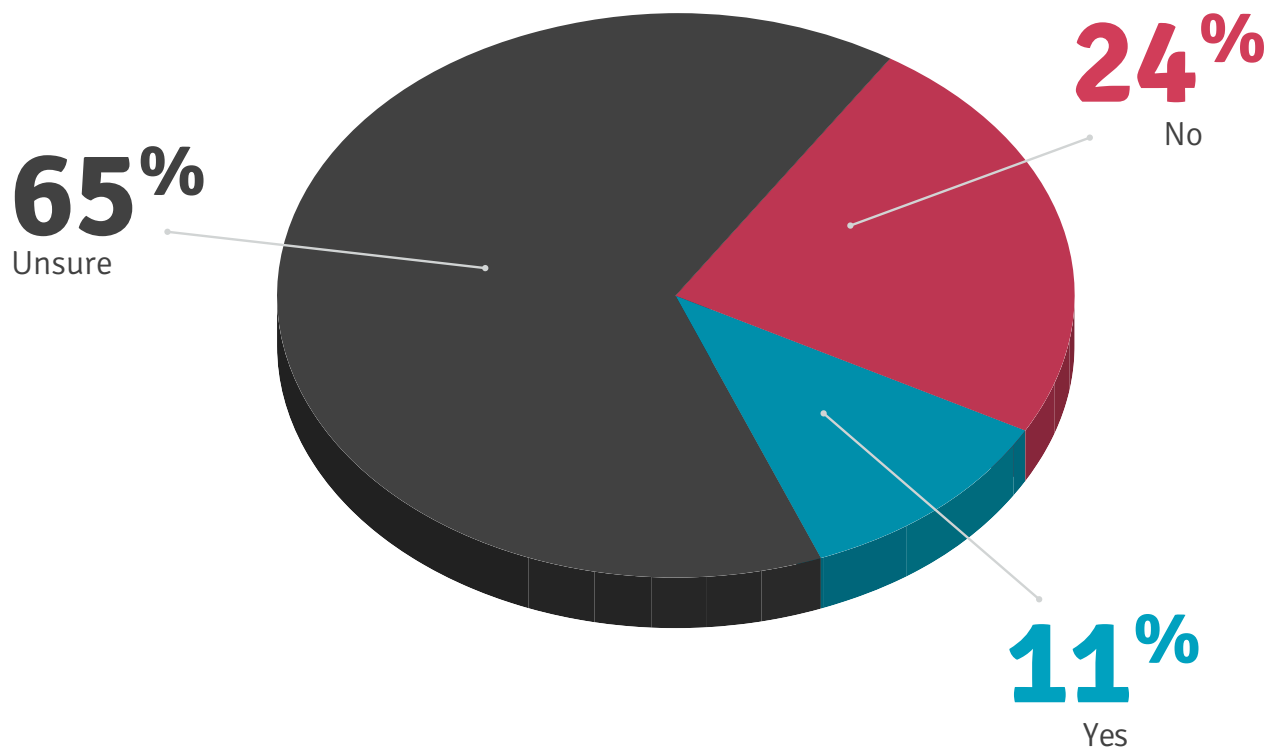
Key Insight

Although Amazon is the second most popular choice for big data in the cloud, **Google is making an impressive entrance in this year's survey.** 11% of respondents are planning on deploying Google BigQuery in production, while 65% are still investigating.

Or will hybrid deployments be the "new normal"?

Replacing
- 2016: 20%
- 2017: 18%
- 2018: 19%

Augmenting
- 2016: 41%
- 2017: 40%
- 2018: 42%

Both
- 2016: 40%
- 2017: 42%
- 2018: 39%

Key Insight

The typical Enterprise Data Portfolio continues to combine traditional data warehousing solutions (e.g. Teradata), contemporary data platforms (e.g. Hadoop) and Big Data services (e.g. Google BigQuery, Amazon Redshift and Microsoft Azure). Over the last 3 years, the same trend persists: **only 20% of respondents say they look at Big Data as a replacement strategy for earlier data platforms.**

ATSCALE