

The Data Management Survey 22

The voice of the data management community

The Sample, KPIs and Methodology

This document provides background information to help gain a clearer understanding of The Data Management Survey 22



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Introduction

The Data Management Survey 22 is the largest and most thorough fact-based analysis of the data management software market currently available. It is not based on anecdotal accounts or personal opinions, unlike much analyst research, neither is it intended to be a measure of market shares. Instead, it sets out to analyze market trends and produce meaningful comparisons of competing products across a wide range of critical software and vendor-related criteria. The Data Management Survey also provides a detailed quantitative analysis of why customers buy data management tools, what they are used for, what problems they experience with the tools and how successful they are.

This is the third edition of The Data Management Survey. Based on the real-world experiences of 1,101 respondents, much of its value lies in the effective analysis of such an impressive, well-distributed sample.

The Data Management Survey 22 features 20 data management products from 15 different vendors. It includes not just products from well-known global giants such as Microsoft, Oracle and SAP, but also tools from much smaller vendors that ordinarily don't get much press but which, in many cases, offer outstanding value to customers.

After data cleansing and removing responses from participants unable to answer specific questions about their use of data management products, we were left with a sample of 1,065 people who responded to the survey with 845 answering a series of detailed questions about their use of a named product. Participants from all over the world took part in The Data Management Survey 22.

The findings from The Data Management Survey 22 are presented in several documents, each focusing on a specific set of the survey results.

Document	Description
The Data Management Survey 22 – The Results	An overview and analysis of the most important findings and topical results from The Data Management Survey 22. Includes advice to buyers of data management software as well as users of existing data management solutions based on the results of our analysis.
The Data Management Survey 22 – The Sample, KPIs and Methodology	Details of the sample, the products included and an overview of our methodology. Descriptions of the KPIs used in The Data Management Survey 22 are also provided, including details of our calculation methods.
The Data Management Survey 22 – Vendor Performance Summaries	A series of executive reports on each product featured in The Data Management Survey 22. Each report contains a short vendor and product overview by BARC's analyst team plus a summary of the relevant product-related results from The Data Management Survey 22.

Making digital leaders

BARC (Business Application Research Center) is one of Europe's leading analyst firms for business software, focusing on the areas of data, business intelligence (BI) and analytics, enterprise content management (ECM), customer relationship management (CRM) and enterprise resource planning (ERP).

Our passion is to help organizations become digital companies of tomorrow. We do this by using technology to rethink the world, trusting data-based decisions and optimizing and digitalizing processes. It's about finding the right tools and using them in a way that gives your company the best possible advantage.

This unique blend of knowledge, exchange of information and independence distinguishes our services in the areas of research, events and consulting.

Research

BARC studies are based on internal market research, software tests and analyst comments, giving you the security to make the right decisions. Our independent research brings market developments into clear focus, puts software and vendors through their paces and gives users a place to express their opinions.

Events

Decision-makers and IT industry leaders come together at BARC events. BARC seminars in small groups, online webinars and conferences with more than 1,000 participants annually all offer inspiration and interactivity. Through exchange with peers and an overview of current trends and market developments, you will receive new impetus to drive your business forward.

Consulting

In confidential expert workshops, coaching and in-house consultations, we transform the needs of your company into future-proof decisions. We provide you with successful, holistic concepts that enable you to use the right information correctly. Our project support covers all stages of the successful use of software.

For further information see:

www.barc-research.com

The sample

Most surveys are conducted or sponsored by an organization based in, and focused on, one country. However, data management is a worldwide market and we wanted to capture a larger international sample.

The net result was an extraordinarily international panel. Respondents were located in 56 countries. The countries with the most respondents were Germany, Switzerland and the United States. The regions with the most respondents were Europe, North America and Asia Pacific.

The online questionnaire was published in two languages: English and German.

Sample size and make-up

Many thousands of people around the world were invited to participate in The Data Management Survey 22, using BARC's online research panel and the support of vendors and various websites. The questionnaire offered different sets of questions for vendors and users (or consultants answering on behalf of users).

The results of the online data collected are shown in the following chart, with the numbers of responses removed also displayed.

Table 1: Responses to the survey

	Responses	
Total responses	1,101	100%
Filtered during data cleansing	-36	-3%
Remaining after data cleansing (total answering questions)	1,065	97%
Non-user (did not answer questions about products)	-94	-9%
Vendor (did not answer questions about using products)	-126	-11%
Total answering product-related questions	845	77%

The number of responses is split between users, consultants, vendors and non-users. Vendors answered a different set of questions to those answered by users. This document focuses on the analysis of the user results.

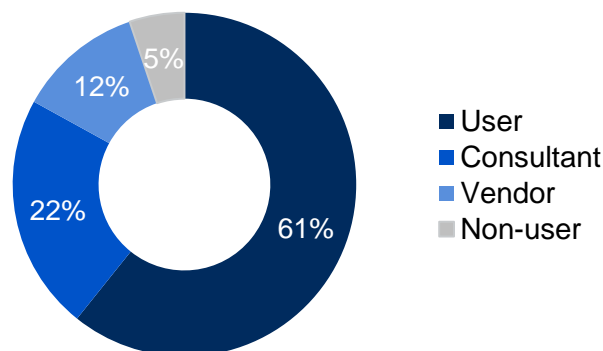


Figure 1: Does your business use data management tools? (n=1,065)

Organization sizes by headcount

Specialist data management software is most commonly found in midsize and large organizations. A high percentage of the responses we received were from medium-sized companies between 100 and 2,500 employees (see Figure 2).

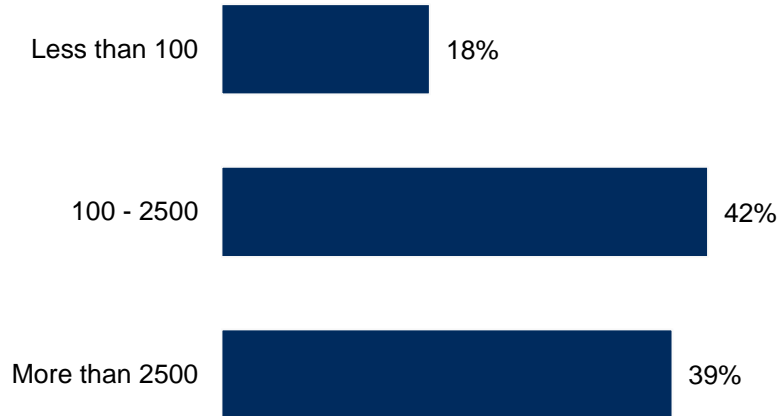


Figure 2: How many employees are there in your entire organization, including all of its branches, divisions and subsidiaries? (n=841)

Vertical markets

We asked all respondents which industry sector their company operates in. The chart below summarizes the responses to this question. Most respondents work in services, followed by manufacturing and financial services.

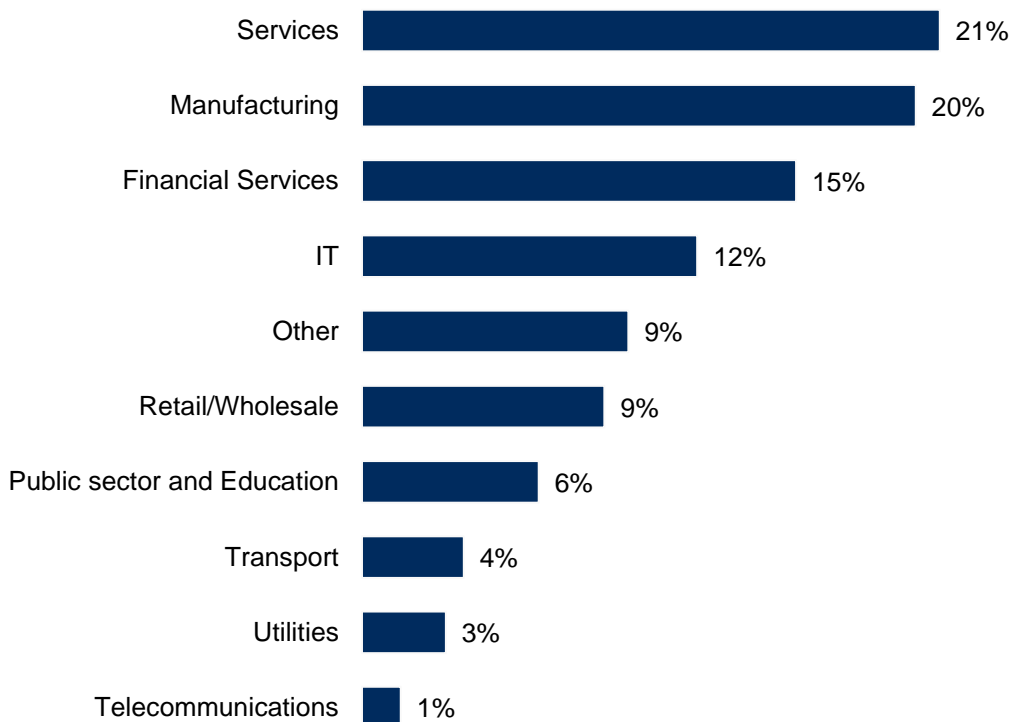


Figure 3: Which of the following best describes your organization's industry sector? (n=939)

Featured products

When grouping and describing the products featured in The Data Management Survey, we did not strictly follow the naming conventions the vendors use. Note that the names we use in this document are our own and are not always the official product names used by the vendors.

One of the key reasons for this is that the products we analyze are not necessarily the latest version of the tool. Vendors often change the product name between versions, making it difficult to have a single official name for several versions of the same product. The point is not to challenge the naming conventions of the vendor, but simply to reduce the complexity of the survey findings for the convenience of the reader. In some cases, we also shorten the names of the products to improve the formatting of the charts.

We asked respondents explicitly about their experiences with products from a predefined list, with the option to nominate other products. Our predefined list can be found at the end of this document. In cases where respondents said they were using an 'other' product, but from the context it was clear that they were actually using one of the listed products, we reclassified their data accordingly.

The following table shows the products included in the detailed analysis. In this edition of The Data Management Survey, a minimum of 20 responses is required for a product to be included in the detailed analysis. The number of responses about 'other' products is not included in the following table.

Table 2: Products included in the sample

Vendor	Product name	Respondents
2150	Datavault Builder	30
Alation	Alation Data Catalog	30
Amazon	Amazon Redshift	32
AnalyticsCreator	AnalyticsCreator	31
Collibra	Collibra Data Catalog	32
Dataspot	Dataspot	48
Exasol	Exasol Database	30
Google	Google Big Query	31
Informatica	Informatica EDC	30
Microsoft	Microsoft Azure Data Factory	31
Microsoft	Microsoft SQL Server	78
Microsoft	Microsoft SSIS	32
Oracle	Oracle Data Integrator	32
Oracle	Oracle Database	33
SAP	SAP BW on HANA	31
SAP	SAP BW/4HANA	30
SAP	SAP HANA	30
Snowflake	Snowflake CDP	26
Synabi	Synabi D-QUANTUM	32
TimeXtender	TimeXtender	31

20 products (or bundles of products) are featured in The Data Management Survey 22. The products in the sample vary in their market focus and origin.

Peer groups

The Data Management Survey 22 features a wide range of data management tools. Therefore, we use peer groups to help readers identify and compare competing products. The peer groups are defined using the criteria outlined in Figure 3: Which of the following best describes your organization's industry sector? (n=939).

The peer groups are designed to help readers compare similar tools in terms of the scenarios the products are used in. See Table 4 for an overview of the products in each peer group. These functional peer groups are mainly data-driven and based on how customers say they use the product.

Table 3: Peer group descriptions

Peer group	Description
Data Warehouse Technologies	Data warehouse technologies prepare, store and provide data for data warehousing purposes
Products to Support DW Automation	Products in this peer group support data-driven or requirements-driven data warehouse design and implementation. They mainly focus on the simplification and automation of data integration and data modeling tasks.
Data Pipelining Products	Data pipelining products take a modern approach to data integration and support more than one data integration pattern. A pattern can be data interaction, data integration, data preparation or even data orchestration in order to get data connected and to make it usable for any kind of business purpose.
Business Software Generalists	Business software generalists have a broad product portfolio including most (or all) types of enterprise software for a variety of business requirements (e.g., ERP, BI, DM).
Analytical Database Products	Analytical database products prepare, store and provide data for analytical purposes.
Data Governance Products	Data governance products help to control, develop, monitor and secure data to make it usable for business needs. They do not manipulate data. Instead, they focus on managing and leveraging metadata such as data catalogs.

Table 4: Products by peer group matrix

	Data Warehouse Technologies	Products to Support DW Automation	Data Pipelining Products	Business Software Generalists	Analytical Database Products	Data Governance Products
2150 Datavault Builder		x				
Alation Data Catalog						x
Amazon Redshift	x			x	x	
AnalyticsCreator		x				
Collibra Data Catalog						x
Dataspot						x
Exasol Database	x				x	
Google Big Query	x			x	x	
Informatica EDC						x
MS Azure Data Factory		x	x	x		
MS SQL Server	x			x	x	
MS SSIS		x	x			
Oracle Data Integrator		x	x	x		
Oracle Database	x			x	x	
SAP BW on HANA	x		x	x		
SAP BW/4HANA	x	x	x	x		
SAP HANA	x			x	x	
Snowflake CDP	x				x	
Synabi D-QUANTUM						x
TimeXtender		x				

Overview of the key calculations in The Data Management Survey 22

Means and medians

This survey makes frequent references to different forms of averages: means and medians. Just in case your statistical knowledge is a little rusty, here's a quick reminder of the definition of the terms:

The mean is the usual arithmetic average. Its value is affected by every value in the sample, so a single large outlier can materially affect the mean, particularly with small samples.

The median is the value in the middle of the sample; that is, half of the sample is larger than the median, and the other half is smaller. It could be regarded as the 'typical value', and is affected by the number, but not the value, of outliers. One or two large or small outliers therefore do not affect the median.

Understanding multiple response questions

Several questions in The Data Management Survey 22 allow the user to make multiple responses. For example, we asked users what problems (if any) they encountered in their projects. Because many users had more than one problem, the number of responses is larger than the number of respondents.

This means that there are two ways to calculate the percentage of a given response: based on the total number of responses or based on the total number of respondents. We present The Data Management Survey results based on the number of respondents.

Calculating percentages based on the number of respondents tells us how likely a given respondent is to have the problem but results in percentages higher than 100 percent when all the problems are added together (e.g., 47 percent of all respondents reported that they have no significant problems). Conversely, calculating percentages based on the total number of responses would result in a total of 100 percent.

Survey data collection

The survey was conducted by BARC, with data captured from January to May 2021. All data was captured online from a total of 1,101 respondents.

Respondents were solicited individually via BARC's own research panel and from dozens of vendor and independent lists, as well as websites from many different countries, with emailed invitations being sent to the lists in a staggered fashion.

At our request, most of the vendors notified their customers about The Data Management Survey using either their regular newsletters or websites. We also asked some bloggers to promote it. Each list and website had a different survey URL though in all cases the same questionnaire (in English or German) was used.

Understanding the KPIs

The goal of this section is to help the reader spot winners and losers in The Data Management Survey 22 using well-designed dashboards packed with concise information. The survey includes a set of 17 KPIs for each of the 20 products.

We have calculated a set of KPIs for each of the six peer groups. The values are normalized on the whole sample. Peer groups are used to enable fair and useful comparisons of products that are likely to compete.

The KPIs all follow these simple rules:

- Only measures that have a clear good/bad trend are used as the basis for KPIs.
- KPIs may be based on one or more measures from The Data Management Survey.
- Only products with samples of at least 15-30 (depending on the KPI) for each of the questions that feed into the KPI are included.
- For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best). A linear min-max transformation is applied, which preserves the order of, and the relative distance between, products' scores.

KPIs are only calculated if the samples have at least 15-30 data points (this varies from KPI to KPI) and if the KPI in question is applicable to a product. Therefore, some products do not have a full set of KPIs. It is important to exclude KPIs based on small (and therefore not representative) samples to ensure that the graph scales are not distorted by outlier KPIs. In such cases, the product is still shown in the tables, but with a blank KPI value and no bar in the bullet graph or bar chart.

Table 5: The KPIs

Aggregated KPIs	KPIs
Customer Satisfaction	Price to Value
	Time to Market
	Recommendation
	Product Satisfaction
	Support Quality
Customer Experience	Performance
	Platform Reliability
	Developer Efficiency
	Usability
Innovation	Innovation Power
	Automation
Technical Capability	Connectivity
	Functionality

Reading the KPI charts

We provide two different types of dashboards for viewing the KPIs. The first type is the Product Dashboard. A Product Dashboard displays all the KPIs for a single product. The second type is the KPI Dashboard, which displays the KPI values for each product in a peer group using simple bar charts. The products are sorted by value in descending order.

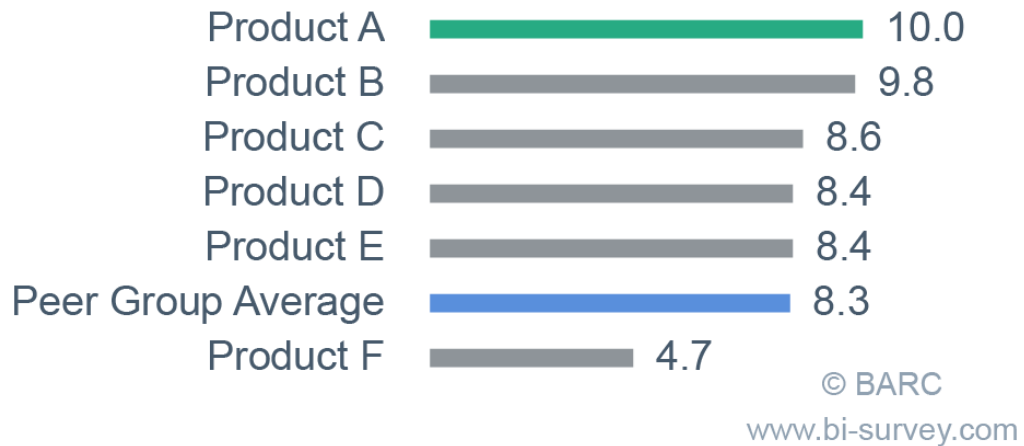


Figure 4: KPI dashboard used for displaying KPIs

In the KPI Dashboards (see Figure 4), the peer group average is indicated by a blue bar.



Figure 5: Product dashboard used for displaying all KPIs for a product in a specific peer group

In Figure 5, the first column shows the KPI name and the second column indicates the product rank in the specific peer group. As previously mentioned, not every product is represented by the complete set of KPIs. The gray squares show how many products in the peer group have an adequate sample to be classified in each KPI. The next column shows the KPI values for the product in question in each KPI and the blue bars in the final column represent those KPI values against the peer group average, which is indicated by a vertical gray line.

The KPIs (overview)

The following section provides a list of the KPIs calculated for The Data Management Survey 22, as well as a description of the calculations.

KPIs are only calculated if the samples have at least 15-30 data points (depending on the KPI), so some of the products do not have a full set of KPIs. It is important to exclude KPIs based on small (and therefore unreliable) samples to ensure that the graph scales are not distorted by outlier KPIs based on small data samples. In such cases, the product is still shown in the tables but with a blank KPI value in the bar chart.

Different readers will have their own views on which of these KPIs are important to them. For example, some people will regard *Price to Value* as vital, while others may consider *Recommendation* or *Performance* to be more important.

The KPIs below provide a good selection from which readers can choose those that best fit their own organization's requirements.

Customer Satisfaction

We combine the *Price to Value*, *Time to Market*, *Recommendation*, *Product Satisfaction* and *Support Quality* root KPIs to calculate this aggregated KPI. These five factors are clearly related: If one is lacking, then the importance of the others is accentuated.

Price to Value

What we measure

This KPI is based on how users rate their tool in terms of its price-to-value ratio.

Why it is important

Price-to-value is an important metric in today's cost-conscious age. As many a data management tool user has found, the costs of buying and supporting software quickly add up, especially when attempting to cost-justify adding new users. As more capabilities are pushed out to the business, this perception of value becomes even more critical.

How we measure

We ask participants to rate the price-to-value ratio of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Time to Market

What we measure

This KPI is based on how users rate their tool in terms of adaptability.

Why it is important

This gives an indication of the extent to which the tool supports the ability to react quickly and adequately to changes or to create new applications as efficiently and quickly as possible.

How we measure

We ask participants to rate the adaptability (agility to adapt to new requirements) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Recommendation

What we measure

This KPI is based on the proportion of users that say they would recommend the product to others.

Why it is important

No one knows more about how a product performs in the real world than the customers already using it. All too often, they find that products don't live up to expectations, or that the vendor does not support the product properly. Therefore, if existing users say they would recommend the product, we regard this as a positive indicator of its value.

How we measure

Users are asked whether they would recommend the product they are most familiar with. This measure is based on the proportion of positive responses and the degree of certainty with which respondents say they would (or would not) recommend the product.

Product Satisfaction

What we measure

This KPI is based on the proportion of users that say they are satisfied with their product.

Why it is important

The interaction of several architectural and technical factors, the concept of application use and the fulfillment of set expectations form the foundation of product satisfaction. This KPI provides an indication of whether – and in what quality – the performance promise has been fulfilled and how conveniently the tool can be used. The KPI goes beyond specific functionality and evaluates the product as a whole.

How we measure

Users are asked whether they are satisfied with the product they are most familiar with. This measure is based on the degree of satisfaction reported and the proportion of positive responses.

Support Quality

What we measure

This KPI is based on how users rate their tool in terms of support quality.

Why it is important

Product support from the vendor is a key determinant of project success. There can be a big difference between the level of support services offered and the quality of the actual support provided. This KPI helps buyers to understand how helpful the software vendor's customer support really is.

How we measure

We ask participants to rate the support quality (i.e., availability, geographic coverage, support channels, effectiveness, efficiency, reaction time) provided for their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Customer Experience

Delivering a superior customer and user experience is more important than ever. Data management professionals do not want to have to spend a lot of time developing, implementing and monitoring data processes. As a result, they are looking for easy-to-use interfaces and good support in their workflows based on a performant and reliable software platform.

With the current vogue for agility and self-service capabilities and the increasing need for business users to be able to access a variety of data sources, the user experience with a data management product is an important consideration for many organizations.

To calculate the quality of customer experience of a data management tool, we combine the *Performance, Platform Reliability, Developer Efficiency* and *Usability* KPIs.

Performance

What we measure

This KPI is based on how users rate their tool in terms of performance.

Why it is important

Performance satisfaction is crucial when loading or querying (large) datasets or when calculating data. In some ways, complaints about performance are more important than performance measured in seconds, because acceptable delays can vary depending upon how the system is used.

How we measure

We ask participants to rate the performance (query performance, load performance, processing performance) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Platform Reliability

What we measure

This KPI is based on how users rate their tool in terms of platform reliability.

Why it is important

A tool brings benefits if it works reliably and is always available. Tool failures are not only annoying, but they can also lead to time-consuming troubleshooting or even threats to the business. This KPI indicates how robust and stable the tool is in everyday use, and therefore how reliable it is.

How we measure

We ask participants to rate the platform reliability (i.e., stability, functional reliability, monitoring capabilities) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Developer Efficiency

What we measure

This KPI is based on how users rate their tool in terms of developer efficiency.

Why it is important

80 percent of development effort is spent on preparing data before users can get their hands on it. The data preparation process is complex and time-consuming. In order to make this process as efficient as possible, experts should be able to concentrate on the task at hand. Therefore, the extent to which a tool can support experts with development and testing functions or relieve them of administrative tasks is of vital importance.

How we measure

We ask participants to rate the developer efficiency (e.g., for testing, deployment, reusability, ease of coding and use of metadata) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Usability

What we measure

This KPI is based on how users rate their tool in terms of usability.

Why it is important

A tool must be easily usable for both technical and business users to be efficient. An increasing number of business users are taking charge of data management tasks and must be able to use data management software (e.g., to access or provide data). Therefore, tools must be simple and easy to use so they are accepted by business users. In addition, technical users are more efficient when they have a well-thought-out workflow in an organized interface with functions that can be easily applied or artifacts that can be reused.

How we measure

We ask participants to rate the usability (i.e., ease of use, GUI design, transparency and documentation) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Innovation

New ideas and technologies are the lifeblood of the software industry. However, some vendors prefer to rest on their laurels, relying on existing technologies and lucrative maintenance contracts with loyal customers. If a data management tool cannot keep up with recent developments, it becomes outdated very quickly and cannot deliver the same level of benefits as rival tools.

The *Innovation* KPI combines the *Innovation Power* and *Automation* KPIs to measure a product's level of innovation.

Innovation Power

What we measure

This KPI is based on how users rate their tool in terms of innovative strength.

Why it is important

Efficiency in data management can be significantly improved by using innovative technologies such as AI. The development and user adoption of new, useful features as well as a robust, well-thought-out and transparent vendor roadmap are important indicators for companies wanting to leverage the tool in the best and most efficient way in the medium to long term.

How we measure

We ask participants to rate the innovative strength (i.e., amount of innovative functionality in the tool, market trend adoption time and rate) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Automation

What we measure

This KPI is based on how users rate their tool in terms of its support for the automation of recurring processes.

Why it is important

Automation saves resources by pushing workloads to machines, speeds up time-to-market by using intelligent algorithms and can also be seen as an enabler for data management (e.g., by supporting users to manage data or enabling them to access data). This becomes critical, particularly where data landscapes are growing and becoming increasingly spread across different systems and locations (e.g., on-premises, cloud, edge) and business users continue to become more involved in data management tasks.

How we measure

We ask participants to rate their chosen product's support for the automation of recurring processes (e.g., by utilizing ML). To obtain the final KPI, we calculate an average weighted score per product.

Technical Capability

The aggregated *Technical Capability* KPI combines the *Connectivity* and *Functionality* KPIs.

Connectivity

What we measure

This KPI is based on how users rate their tool in terms of its connectivity to data sources/targets and interfaces to integrate in ecosystems.

Why it is important

Connectivity is one of the most important criteria when selecting software. Tools must be able to be integrated into existing processes and system landscapes. Openness is an indicator of how easily a tool can be integrated (e.g., by supporting standards). This KPI is an indicator of the effort required to integrate the product with other applications and how robust the interfaces are in handling changes in the environment (e.g., to the source system's model or front-end applications). This KPI also considers the amount and quality of connectors available to connect to source and target systems. It is always helpful to have the logic in place (and maintained) that enables users to extract and load data or metadata.

How we measure

We ask participants to rate their chosen software's connectivity to data sources/targets and interfaces to integrate into ecosystems. To obtain the final KPI, we calculate an average weighted score per product.

Functionality

What we measure

This KPI is based on how users rate their tool in terms of functionality.

Why it is important

In order to perform various data management tasks, the requisite functionality must be available to users. This KPI is an indicator of the efficiency and effort with which tasks can be implemented, based on the scope and completeness of the functionality offered with the product.

How we measure

We ask participants to rate the functionality (i.e., capabilities and functional scope) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Product picklist used in The Data Management Survey 22

Ab Initio Co>Operating System

Action DataConnect

Amazon Redshift

Data Virtuality Platform

Denodo Platform

Google BigQuery

Google Cloud Dataflow

IBM Db2

IBM Cloud Pak for Data

IBM InfoSphere Information Server

Informatica iPaaS

Microsoft Analytics Platform System

Microsoft Azure Analysis Services

Microsoft Azure Data Factory

Microsoft SQL Server

Microsoft SQL Server Integration Services

Oracle Autonomous Data Warehouse Cloud

Oracle Data Integrator

Oracle Database

Hitachi Vantara Lumada

SAP BW on HANA

SAP BW/4HANA

SAP Data Intelligence

SAP Data Services

SAP HANA

SAS Data Integration Server

SAS Viya

Snowflake

Talend Data Fabric

Teradata Database

TimeXtender Discovery Hub

Wherescape RED

Ataccama ONE Platform

AnalyticsCreator

IBM Watson Knowledge Catalog

Ab Initio Metadata Hub

Action X

Adaptive Metadata Manager

Alation Data Catalog

Alex Solutions Alex

Amazon Glue

ASG Enterprise Data Intelligence Solution

Cloudera Data Platform

Collibra Data Governance Center

Collibra Data Catalog

Conweaver Linksphere

Datameer Spectrum

Dell Boomi AtomSphere Platform

eccenca Corporate Memory

Erwin Data Intelligence Suite

Exasol

Google Cloud Data Catalog

Vertica Analytics Platform

Infogix Data360

Informatica PowerCenter

Informatica Enterprise Data Catalog
Informatica Data Quality and Governance
Information Builders Platform
Jitterbit Harmony
MariaDB Platform
MarkLogic Server
Microsoft Azure Data Catalog
MongoDB Server
MuleSoft Anypoint Platform
Oracle Enterprise Metadata Management
Synabi D-QUANTUM
Talend Data Catalog
Talend Data Integration
Teradata Vantage
bluetelligence Enterprise Glossary
Dremio
Fivetran Platform
HPE Ezmeral Data Fabric
MariaDB SkySQL
Matillion ETL
Precisely Connect
Precisely Spectrum
Precisely Trillium
SAP Data Warehouse Cloud
SAS Data Governance
Zeenea Data Catalog
Raw Labs NoDB
Dataspot

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