VENDOR SELECTION MATRIX™ OBSERVABILITY PLATFORMS

The Top Global Vendors 2024

August 2024

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independent research & consulting

THE RESEARCH IN ACTION MARKET IMPACT

Members In Our Survey Panel

150,000+ IT Automation
100,000+ Marketing Automation

25+ Research Reports Published p.a.

350+ vendors evaluated
12,000+ views per report (average)

10,000+ Active Enterprise Survey Participants p.a.

all with budget responsibility

15+ Press Releases p.a.

2,000+ views per press release (average)

Vendor Selection Matrix™: The right mix makes all the difference
63% customer evaluations (typically based on 1,000 interviews per report) **+ 37% analyst's judgement = 100% success**

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vendor selection matrix®

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation, where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix™ reports so unique. This approach is one of the key differentiators of Research In Action in market research. For this report, we interviewed 1,000 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

The observability market has transformed significantly over the past year, driven by rapid technological advancements and a closer alignment with evolving business priorities. The growing complexity of cloud-native environments and the proliferation of microservices have underscored the importance of observability, prompting organizations to prioritize comprehensive observability platforms and solutions to better understand and influence business outcomes. Key trends include the integration of AI and machine learning to enhance predictive analytics and automated anomaly detection, alongside a heightened focus on user experience and real-time monitoring. Additionally, the convergence of observability with security has emerged as a critical consideration, addressing the growing need for holistic visibility across systems. These dynamics have reshaped vendor offerings, necessitating a thorough evaluation of capabilities and alignment with evolving enterprise needs. This study by Research In Action provides a to guide organizations in navigating the intricate landscape of observability platforms and solutions.

Let us know your thoughts.

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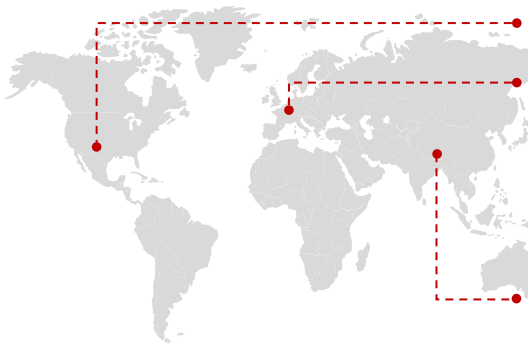
OUR SURVEY DEMOGRAPHICS:
IT AUTOMATION IN GLOBAL ENTERPRISES

Country Breakdown



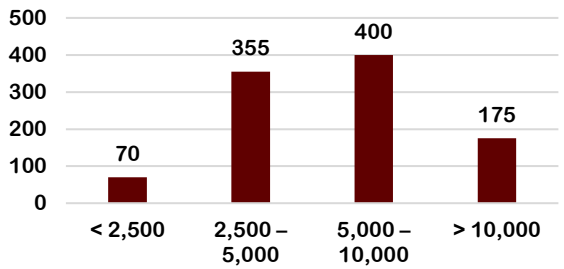
North America	450
DACH	150
United Kingdom	100
France	100
Benelux/Nordics	50
Europe (Rest)	50
Asia Pacific	100

Industry Breakdown

Energy	100
Financial Services	175
Government & Non-Profit	50
Life Sciences	100
Manufacturing	250
Technology, Media & Telecoms	125
Consumer Packaged Goods & Retail	75
Professional Services	50
Travel & Transportation	75
Total	**1,000**

Company Size Breakdown

(Enterprises with revenue > € 250 million p.a.)



Job Title Breakdown

VP IT Infrastructure	125
IT Manager	125
VP IT	100
Chief Information Officer	100
IT Operations Manager	75
VP Service Desk	75
Chief Technology Officer	50
VP Operations	50
Chief Digital Officer	50
Chief Operations Officer	50
Business Executive	35
Sourcing And Vendor Management	25
Project Management Office	25
VP IT Financial Management	25
VP Enterprise Architecture	25
Project Manager	25
VP Application Development	20
VP IT Shared Services	20
Total	**1,000**

All Research in Action surveys are gender neutral and 100% confidential.

75,000+
Data Points

1,000
Enterprise Managers

37%
Analyst's Opinion

63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.
We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.
The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.

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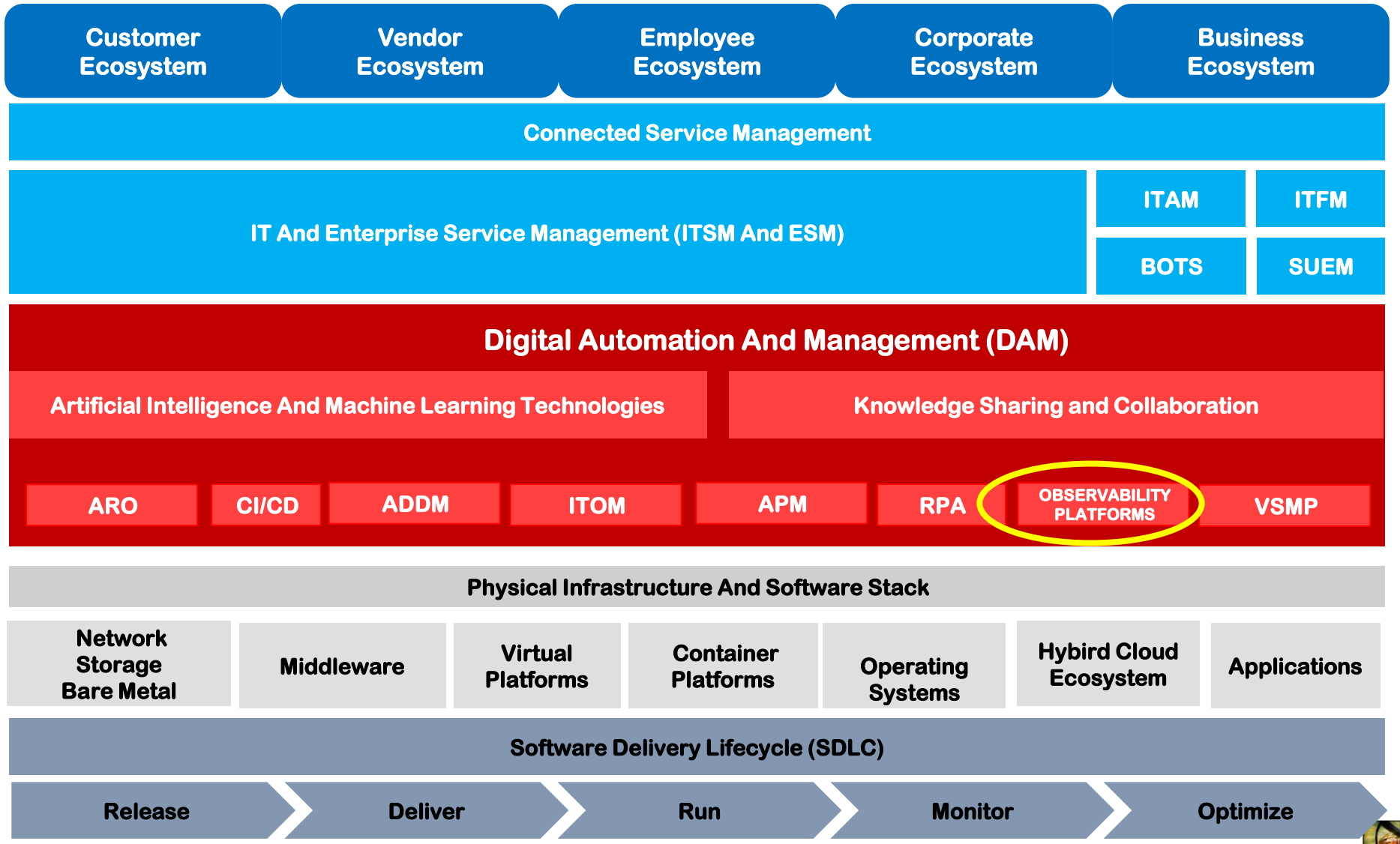
WHAT IS AN OBSERVABILITY PLATFORM?

- An Observability Platform provides real-time insights of where, what and why issues exist across the business technology estate to enhance system performance, reliability, and overall operational efficiency. An Observability Platform leverages real and historical data from across the infrastructure and applications such as metrics, traces, histograms, logs, and events. The focus of an Observability Platform is to prevent, optimize, prioritize and resolve issues before they can impact the business negatively.
- Observability enables IT professionals to explore and analyze the characteristics and patterns of a system, thereby facilitating real-time and historical analysis that interprets and infers the system's internal state.
- Observability also empowers business teams to prioritize issues from a user experience perspective by identifying which service performance have the greatest impact on experience and business metrics. It accelerates root cause determination and resolution of experience issues, thereby minimizing the impact on the business.
- NOTE: While Artificial Intelligence for IT Operations (AIOps) and observability are closely related, they serve distinct purposes:
  - AIOps is primarily concerned with using artificial intelligence and machine learning with the main goal improve efficiency, reduce downtime, and enhance the overall performance of IT operations through intelligent automation and real-time insights.
  - Observability focuses on understanding the internal states of a system by analyzing the data it produces, such as logs, metrics, and traces with the main goal to make the system's operations transparent.

THE IT AUTOMATION MARKETEXTURE



IT Automation solutions are necessary for a modern digital operating model.

IT Automation solutions are foundational for any transformation to reduces toil and decrease manual errors.

IT Automation solutions can enforce good practices to optimize digital service quality and speed of service delivery.

OBSERVABILITY ARCHITECTURE

Traces

Metrics

Logs

Events

Software Stack

- Applications
- Frameworks, Libraries
- Middleware
- Platforms (Container, Virtualization)
- Operating System, Bare Metal

Observability Stack

- Application Observability
- Platform Observability
- Infrastructure Observability
- Analytics
- Graphic
- Storage

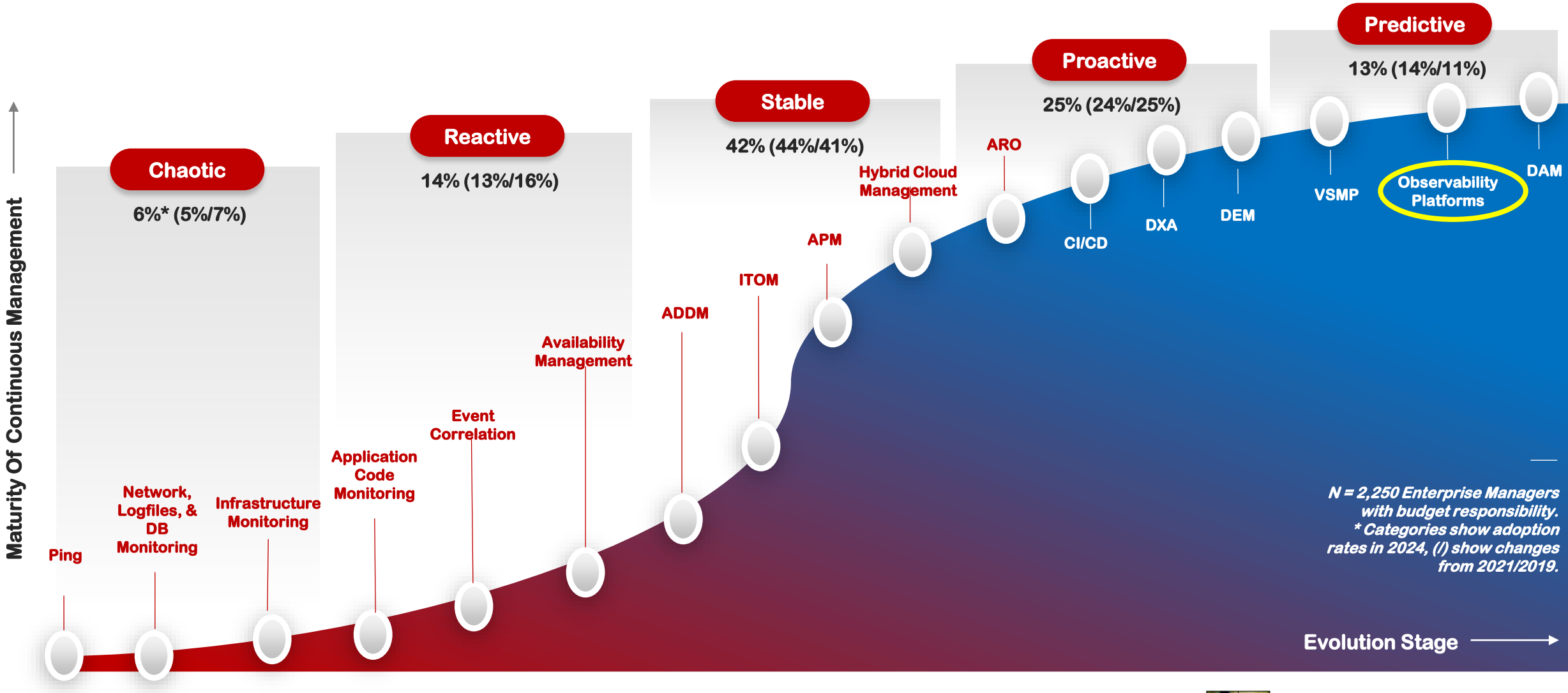
Role Based Dashboard

Insights

Instrument → Collect → Ingest → Store → Process

DIGITAL AUTOMATION AND MANAGEMENT (DAM)

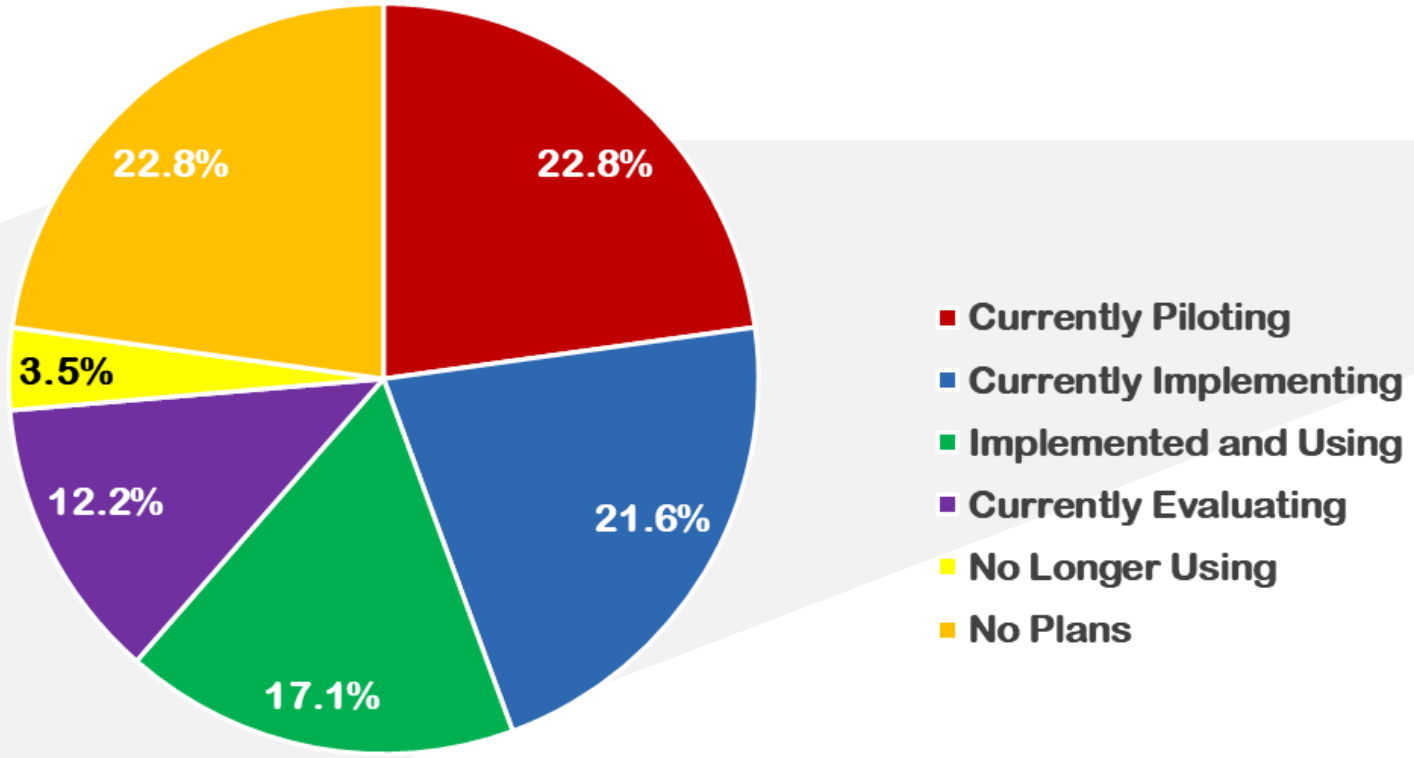
MATURITY S-CURVE



All acronyms are defined in the report Appendix

CURRENT STATE OF OBSERVABILITY

DATA SUGGESTS A DYNAMIC LANDSCAPE FOR IT OBSERVABILITY PLATFORMS IN 2024



N = 991 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your number one priority related to your current observability strategy?

A significant proportion of organizations actively engaging with Observability Platforms

22.8% are currently piloting Observability Platforms, showing a commitment to exploring the benefits before full-scale deployment.

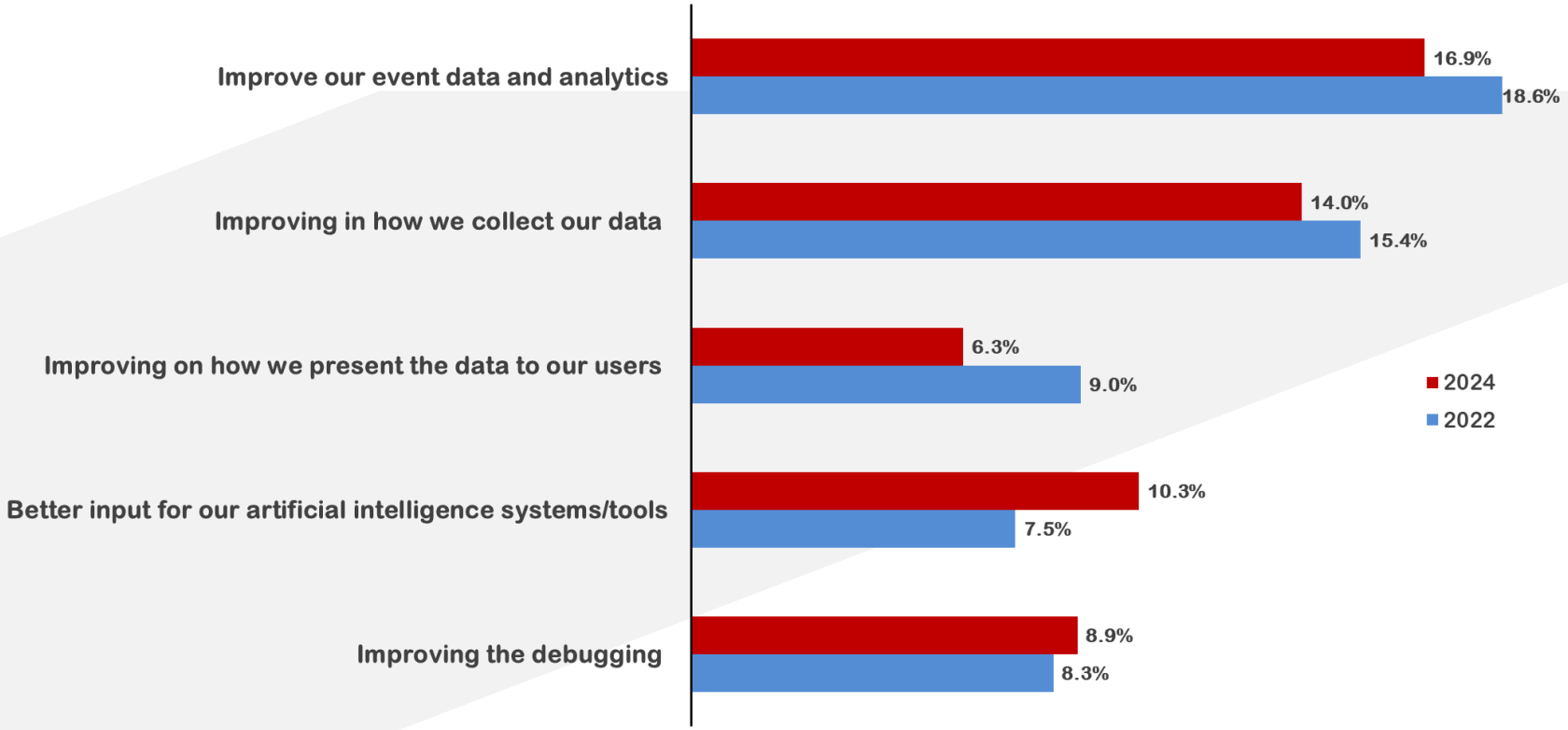
The implementation phase is also robust, with **21.6%** currently in the process of implementing and 17.1% having fully implemented and using these platforms.

A notable 12.2% are currently evaluating options, suggesting a growing interest and potential future adoption.

With **22.8%** of respondents indicating no plans to implement such a platform, there is still a significant portion of organizations either unconvinced of its necessity or facing other priorities. Meanwhile, 3.5% have stopped using these solutions, possibly reflecting dissatisfaction or a shift in strategic focus.

GLOBAL OBSERVABILITY PRIORITIES

PRIORITIES HAVE EVOLVED SINCE 2022 WITH A FOCUS ON BETTER INPUT FOR AI SYSTEMS AND TOOLS



N = 991 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your number one priority related to your current observability strategy?

Priorities within IT and business enterprise teams regarding their observability strategies are evolving.

- **Improve Event Data and Analytics:** The slight decrease in priority for improving event data and analytics suggests a maturing of these capabilities. Organizations might be shifting focus to integrating and leveraging the collected data more effectively.
- **Improving Data Collection:** A slight decrease in priority could suggest that while data collection remains crucial, other areas like AI integration and event analytics are becoming more critical.
- **Improving Data Presentation:** The decrease in priority might indicate that organizations have made progress in data presentation or are shifting their focus to other pressing needs within their observability strategies.
- **Better Input for AI Systems/Tools:** A significant increase suggests a growing emphasis on integrating observability data with AI systems and reflects on the expanding role of AI in optimizing IT operations and the need for high-quality data inputs.
- **Improving the Debugging:** A slight increase in the priority for improving debugging indicates a steady recognition of the importance of efficient problem resolution in maintaining system performance and reliability.

INSIGHTS: TOP MARKET TRENDS 2024

Integration with Artificial Intelligence (AI) and Machine Learning (AI).

This integration significantly enhances predictive analytics, enabling systems to anticipate potential issues before they become critical. AI and ML automate anomaly detection and root cause analysis, reducing the time and effort required to identify and resolve problems.

What this means: The integration of AI and ML with observability tools enhances predictive analytics and automates anomaly detection and root cause analysis. This trend is driven by the growing complexity of IT and business technology environments, which demand more efficient and intelligent tools to manage vast amounts of data and ensure optimal performance.

Unified Observability Platforms.

Unified observability platforms integrate monitoring, logging, and tracing into a single cohesive solution, providing a comprehensive and centralized view of the entire IT and business technology ecosystem. This unification simplifies management by reducing the need for multiple disparate tools, thus enhancing efficiency and reducing operational overhead. Unified platforms offer end-to-end visibility across applications, infrastructure, and networks, enabling quicker identification and resolution of issues.

What this means: This holistic approach is essential for managing complex IT environments, ensuring seamless operations, and driving informed decision-making. By consolidating observability functions, these platforms improve data correlation and context, leading to more accurate insights and streamlined workflows.

Focus on User Experience…for IT and Business User.

Including experiential insights within observability's remit and improve how all insights are presented to both IT and business users is crucial for prioritizing and acting on insights. Enhanced dashboards and visualization tools providing end-to-end insights help IT and business teams quickly interpret data and make informed decisions that prioritize high impact resolutions.

What this means: A focus on including experiential data and UX translates to more efficient workflows, reduction in cognitive load and a stronger alignment between IT and business. When observability tools are designed with business outcome and user in mind, IT professionals can quickly navigate and interpret complex data, leading to faster incident resolution that best meets business needs.

INSIGHTS: TOP MARKET TRENDS 2024 (CONT.)

Observability platforms are no longer just for IT teams.

Observability platforms consolidate monitoring, logging, and tracing into a single solution, providing a comprehensive view of the IT and business technology ecosystem. This integration simplifies management, reduces operational overhead, and enhances data correlation, leading to more accurate insights and streamlined workflows.

What this means: For IT teams, this means quicker identification and resolution of issues, while business teams benefit from a clearer understanding of system performance and its impact on business outcomes.

Enhance data collection and analysis.

With the rise of microservices and distributed architectures, there is a greater need for robust data collection and analytics capabilities. This ensures that all relevant metrics and logs are captured and analyzed in real-time.

What this means: These capabilities together enable organizations to effectively manage complex IT environments and leverage data for their strategic advantage. For IT teams, this means improved system management, faster issue resolution, and optimized resource utilization. For business teams, it translates into enhanced customer experiences, data-driven decision-making, alignment with business goals, and increased agility.

Cloud-native Observability.

With the widespread adoption of cloud services, there is a need for observability solutions designed specifically for cloud-native environments. These tools are optimized for monitoring dynamic and ephemeral cloud resources..

What it means: Cloud-native observability platforms provide real-time insights and automated analytics that help manage the complexity of modern cloud architectures, ensuring performance, reliability, and security. They enable IT teams to track and analyze data across distributed systems, swiftly detect and resolve issues, and maintain seamless operations. For businesses, this translates to improved agility, enhanced user experiences, and the ability to leverage cloud capabilities fully for strategic growth .

INSIGHTS: TOP MARKET TRENDS 2024 (CONT.)

Security integrations.

Observability platforms are increasingly integrating security features to provide visibility into potential security threats and vulnerabilities. This trend is driven by the need for comprehensive IT management that includes security monitoring.

What this means: This trend enhances the ability to detect and respond to potential threats and vulnerabilities in real-time, thereby reducing the risk of breaches and improving overall system resilience. For enterprises, this means streamlined operations, improved compliance, and a proactive stance in managing IT security, ultimately leading to a more robust and secure IT infrastructure.

Scalability and Flexibility.

As businesses scale their operations, observability solutions must be able to handle increased data volumes and complexity. Flexible and scalable observability platforms ensure that organizations can adapt to changing demands.

What this means: Enterprises will prioritize solutions that offer high scalability to manage large and complex data sets. And to handle increased data volumes and complexity, many Observability Platforms have already integrated advanced technologies such as artificial intelligence, machine learning, and big data analytics. These technologies will help in processing and deriving insights from vast amounts of data.

Collaboration and Integration into DevOps Journeys.

Integrating Observability Platforms with DevOps journeys enhances collaboration between development and operations teams (and others involved in the DevOps journey).

What it means: Observability Platforms provide shared visibility into application performance and system health, and therefore enables teams to work more cohesively towards common goals, quickly identify, diagnose, and resolve issues. This leads to reduced downtime and more efficient problem-solving processes and improving overall system reliability.

VENDOR SELECTION MATRIX™
OBSERVABILITY PLATFORMS

These are the Top 19 vendors as selected by 1,000 users from buyer companies based upon product, company and service quality.

VENDOR NAME	SOLUTION
BIG PANDA	BigPanda
BMC SOFTWARE[1]	BMC Helix ITOM, AIOps and observability solution
DATADOG	Datadog Observability Platform
DYNATRACE	Dynatrace
ELASTIC OBSERVABILITY	Elastic Stack
GRAFANA LABS	Grafana Cloud, Grafana Enterprise
HONEYCOMB	Honeycomb
HPE OPSRAMP	OpsRamp
IBM	IBM Instana Observability (and additional IBM Products)
LOGICMONITOR	LogicMonitor
NEW RELIC	New Relic One
RIVERBED	Riverbed Observability
SCIENCE LOGIC	Science Logic
SENTRY	Sentry APM
SIGNOZ.IO	Signoz
SOLARWINDS	SolarWinds Observability
SPLUNK A CISCO COMPANY[2]	AppDynamics, Splunk Observability Cloud, Splunk Platform
SUMO LOGIC	Sumo Logic Observability Suite
SUSE[3]	StackState Observability

This list is alphabetical and includes all relevant Enterprise Service Management vendors named by the survey respondents.

For this report we interviewed 1,000 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Additional vendors that were cited but did not list in the Top 20, or had less than 15 ratings:

- AMAZON CLOUD WATCH
- CATCHPOINT
- JAEGER
- LIGHTSTEP
- PALO ALTO NETWORKS
- PROMETHEUS
- ZENOSS

[1] BMC SOFTWARE announced the Netero acquisition in April 2024.

[2] CISCO announced the Splunk acquisition in September 2023.

[3] SUSE announced the StackState acquisition in June 2024.

NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.

VENDOR SELECTION MATRIX™
EVALUATION CRITERIA

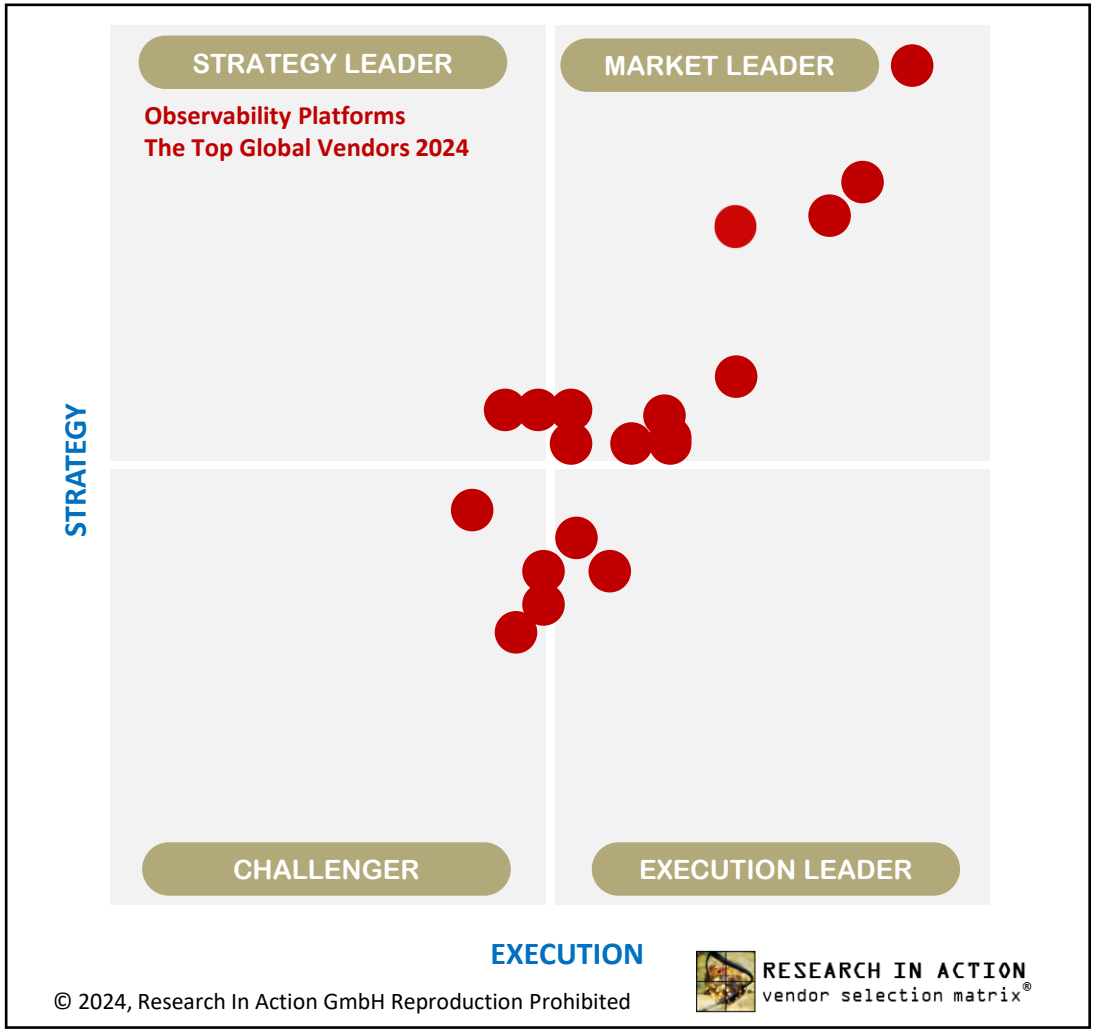
STRATEGY		
Vision And Go-To-Market	30%	› Does the company have a coherent vision in line with the most probable future market scenarios? › Does the go-to-market and sales strategy fit the target market and customers?
Innovation And Differentiation	30%	› How innovative is the company in this market? › Does the solution have a unique selling proposition and clear market differentiators?
Viability And Execution Capabilities	15%	› How likely is the long-term survival of the company in this market? › Does the company have the necessary resources to execute the strategy?
Recommendation Index	25%	› Would customers recommend this vendor in this market to their peers?

EXECUTION		
Breadth And Depth Of Solution Offering	30%	› Does the solution cover all necessary capabilities expected by customers?
Market Share And Growth	15%	› How big is the company's market share and is it growing above the market rate?
Customer Satisfaction	25%	› How satisfied are customers with the solution and the vendor today?
Price Versus Value Ratio	30%	› How do customers rate the relationship between the price and perceived value of the solution?

NOTES:
- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
- 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
- 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
- 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.

The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

VENDOR SELECTION MATRIX™
OBSERVABILITY PLATFORMS



THE MARKET LEADERS

BMC SOFTWARE
SPLUNK A CISCO COMPANY
DATADOG
DYNATRACE
HPE OPSRAMP
IBM
NEW RELIC
RIVERBED
SCIENCE LOGIC
SUMO LOGIC
SUSE

THE OTHERS

BIG PANDA
ELASTIC OBSERVABILITY
GRAVANA LABS
HONEYCOMB
LOGICMONITOR
SENTRY
SIGNOZ.IO
SOLARWINDS

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THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.

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APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.
- **Application Performance Management (APM)** solutions manage the performance and health of applications within a IT enterprise.
- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).
- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.
- **Connected Service Management (CSM)** platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.
- **Continuous Integration/Continuous Delivery (CI/CD)** is software development practice that automates the integration and delivery of code changes. Continuous Integration involves regularly merging code changes into a shared repository, followed by automated testing to detect issues early. Continuous Deployment/Delivery ensures that these tested changes are automatically deployed to production (in the case of CD) or delivered to staging environments for further testing and review (in the case of Continuous Delivery).
- **Digital Automation and Management (DAM)** refers to the comprehensive strategies, tools, and processes utilized to streamline, automate, and optimize various aspects of business and IT digital operations and business processes.
- **Digital Experience Analytics (DXA)** is software that provide advanced insights into digital customer experiences and intentions within and across web, app and other types of digital pages.
- **Digital Experience Monitoring (DEM)** is software that optimizes app performance, proactively prevent interruptions in digital experiences, and ensure seamless user interactions across all digital touchpoints..
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.

APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **Hybrid Cloud Management (HCM) solutions manage the Cloud infrastructures and applications from an end-to-end perspective.**
- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.
- **IT Operations Management (ITOM)** solutions monitor and control IT Services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT Services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Observability Platforms** enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications. Artificial Intelligence and Machine Learning capabilities are part of this which are reflected through the additional add on of AIOps in the name of this market.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **IT Financial Management or Technology Business Management (TBM)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management Platform (VSMP)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.

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