Grid® Report for AlOps Platforms



Winter 2021

AlOps Platforms Software

Contend	ers					Leaders	
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Nicho					High Do	rformore	
Niche					High Pe	rformers	

G2 Grid® Scoring

(AIOps Platforms Software continues on next page)

Satisfaction

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AlOps Platforms Software (continued)

AIOps Platforms Software Definition

AlOps, or artificial intelligence for IT operations, describes using Al or machine learning to analyze large volumes of data across a variety of systems. AlOps platforms take advantage of this to accelerate issue identification and resolution by increasing root cause analysis (RCA) accuracy and proactive identification, which reduces time to resolution and helps improve service level agreement (SLA) adherence. All IT teams can take advantage of the benefits AlOps platforms offer.

By nature of their functions, AlOps platforms are commonly integrated with a variety of other IT-focused tools, including but not limited to a variety of monitoring, incident management, service desk, and log analysis solutions. Many AlOps platforms will integrate those functionalities directly into the platform to consolidate troubleshooting resources.

To qualify for inclusion in the AlOps category, a product must:

- Leverage Al and/or machine learning to analyze large volumes of data
- ▶ Monitor and analyze data from several types of systems
- Proactively and reactively identify issues
- ▶ Aid or guide the issue resolution process
- ▶ Integrate with a variety of IT systems

AIOps Platforms Grid® Scoring Description

Products shown on the Grid® for AlOps Platforms have received a minimum of 10 reviews/ratings in data gathered by November 24, 2020. Products are ranked by customer satisfaction (based on user reviews) and market presence (based on market share, seller size, and social impact) and placed into four categories on the Grid®:

- Products in the Leader quadrant are rated highly by G2 users and have substantial Market Presence scores. Leaders include: Dynatrace, Splunk Enterprise, PagerDuty, AppDynamics, and Datadog
- ► High Performing products have high customer Satisfaction scores and low Market Presence compared to the rest of the category. High Performers include: Instana and LogicMonitor
- Contender products have relatively low customer Satisfaction scores and high Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings.
- Niche products have relatively low Satisfaction scores and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. Niche products include: Splunk Cloud, Micro Focus Operations Bridge (OpsBridge), BigPanda, Splunk Light, Moogsoft, and Zenoss



Grid® Scores for AlOps Platforms Software

The table below shows the Satisfaction and Market Presence scores that determine seller placement on the Grid[®]. To learn more about each of the products, please see the product profile section.

Leaders

	# of Reviews	Satisfaction	Market Presence	G2 Score
Dynatrace	691	94	97	95
Splunk Enterprise	217	75	84	80
PagerDuty	297	94	61	77
AppDynamics	162	72	81	76
Datadog	64	55	70	63

High Performers

Moogsoft

Zenoss

Instana	46	71	16	44
LogicMonitor	12	68	14	41
Niche				
Splunk Cloud	11	47	49	48
Micro Focus Operations Bridge	11	25	36	30
BigPanda	10	40	10	25
Splunk Light	14	13	34	23

37

20

6

14

17

(Grid® Scores for AIOps Platforms continues on next page)

11

10

^{*} Products are ordered by G2 Score. Satisfaction score is used as a tiebreaker if two products have the same G2 Score.



Grid® Methodology

Grid® Rating Methodology

The Grid® represents the democratic voice of real software users, rather than the subjective opinion of one analyst. G2 rates products from the AlOps Platforms category algorithmically based on data sourced from product reviews shared by G2 users and data aggregated from online sources and social networks.

Technology buyers can use the Grid® to help them quickly select the best products for their businesses and to find peers with similar experiences. For sellers, media, investors, and analysts, the Grid® provides benchmarks for product comparison and market trend analysis.

Grid® Scoring Methodology

G2 rates products and sellers based on reviews gathered from our user community, as well as data aggregated from online sources and social networks. We apply a unique algorithm (v3.0) to this data to calculate the Satisfaction and Market Presence scores in real time. The Grid® Report for AlOps Platforms | Winter 2021 is based on scores calculated using the G2 algorithm v3.0 from reviews collected through November 24, 2020. To view the AlOps Platforms Grid® with the most recent data, please visit the AlOps Platforms page.

Satisfaction

The Satisfaction rating is affected by the following (in order of importance):

- Customer satisfaction with end user-focused product attributes based on user reviews
- Popularity and statistical significance based on the number of reviews received by G2
- Quality of reviews received (reviews that are more thoroughly completed will be weighted more heavily)
- Age of reviews (more-recent reviews provide relevant and up-to-date information that is reflective of the current state of a product)
- Customers' satisfaction with administration-specific product attributes based on user reviews
- ▶ Overall customer satisfaction and Net Promoter Score® (NPS) based on ratings by G2 users

Note: The customer satisfaction score is normalized for each Grid®, meaning the scores are relative.

(Grid® Methodology continues on next page)

^{**}Net Promoter, Net Promoter System, Net Promoter Score, NPS and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.



Grid® Methodology (continued)

Market Presence

The Market Presence score is affected by the following (in order of importance):

- Market presence is a combination of 15 metrics from G2's reviews, publicly available information, and third-party sources
- ▶ Both the software sellers and the individual products are measured on various criteria. The criteria are listed in order of importance. Products metric receive greater weight than seller metrics

Criteria	Measu	red For	Metrics
	Product	Seller	
Number of Employees	✓	✓	Employee Count (based on social networks and public sources)
Reviews	✓		Review Count (weighted by recency)
Web Presence	✓	✓	
Social Presence	✓	✓	
Growth	✓	✓	Employee Growth, Web Presence Growth
Seller Age		✓	
Employee Satisfaction and Engagement		✓	

- Each input is normalized by category and segment. This means that scores are relative to other products in the category/segment and may change from segment to segment
- ▶ The scores are then scaled from 0-100

Grid® Categorization Methodology

Making G2 research relevant and easy for people to use as they evaluate and select business software products is one of our most important goals. In support of that goal, organizing products and software companies in a well-defined structure that makes capturing, evaluating, and displaying reviews and other research in an orderly manner is a critical part of the research process.

To manage the process of categorizing the software products and the related reviews in the G2 community, G2 follows a publicly available categorization methodology. All products appearing on the Grid® have passed through G2's categorization methodology and meet G2's category standards.

Many terms that appear regularly across G2 and are used to aid in product categorization warrant a definition to facilitate buyer understanding. These terms may be included within reviews from the G2 community or in executive summaries for products included on the Grid[®]. A list of standard definitions is available to G2 users to eliminate confusion and ease the buying process.

(Grid® Methodology continues on next page)



Grid® Methodology (continued)

Rating Changes and Dynamics

The ratings in this report are based on a snapshot of the user reviews and social data collected by G2 up through November 24, 2020. The ratings may change as the products are further developed, the sellers grow, and as additional opinions are shared by users. G2 updates the ratings on its website in real time as additional data is received, and this report will be updated as significant data is received. By improving their products and support and/or by having more satisfied customer voices heard, Contenders may become Leaders and Niche sellers may become High Performers.

Trust

Keeping our ratings unbiased is our top priority. We require the use of a LinkedIn account or verified business email address to validate a G2 user's identity and employer. We also validate users by partnering with sellers and organizations to securely authenticate users through select platforms. We do not allow users to review their current or former employers' products, or those of their employers' competitors. Additionally, all reviews are manually checked by our team after our algorithm filters out reviews that don't meet our submission requirements. All reviews must pass our moderation process before they are published.

Our G2 staff does not add any subjective input to the ratings, which are determined algorithmically based on data aggregated from publicly available online sources and social networks. sellers cannot influence their ratings by spending time or money with us. Only the opinion of real users and data from public sources factor into the ratings.

Grid® Inclusion Criteria

All products in a G2 category that have at least 10 reviews from real users of the product are included on the Grid[®]. Inviting other users, such as colleagues and peers, to join G2 and share authentic product reviews will accelerate this process.

If a product is not yet listed on G2 and it fits the market definition above, then users are encouraged to suggest its addition to our AlOps Platforms category.

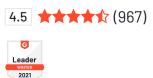
Product Profiles

Product profiles and detailed charts are included for products with 10 or more reviews.



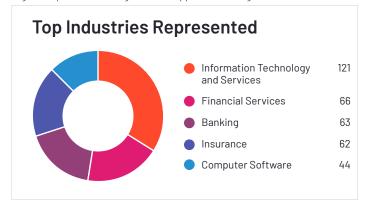


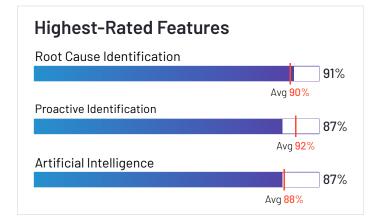
Dynatrace

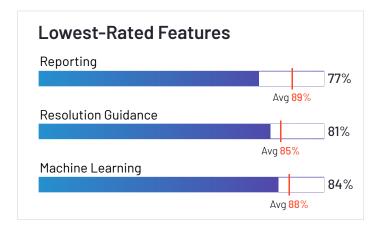


having a large Market Presence. Dynatrace has the largest Market Presence among products in AlOps Platforms. 98% of users rated it 4 or 5 stars, 93% of users believe it is headed in the right direction, and users said they would be likely to recommend Dynatrace at a rate of 89%. Dynatrace is also in the Database Monitoring, IT Alerting, Network Monitoring, Website Monitoring, Application Performance Monitoring (APM), Incident Response, Log Analysis, Container Monitoring, Session Replay, ServiceNow Store Apps, Cloud Infrastructure Monitoring, Digital Experience Monitoring (DEM), Log Monitoring, Enterprise Monitoring, and SAP App Center categories.



















Dynatrace

HQ Location Waltham, MA

Year Founded 2005

Employees (Listed On Linkedin™) 2507

Company Website www.dynatrace.com

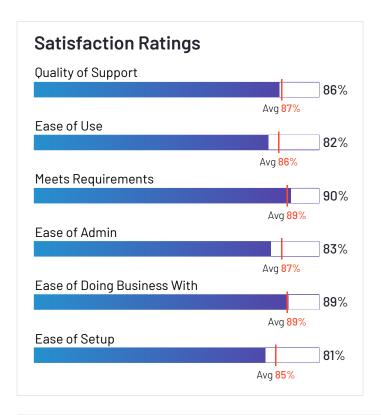


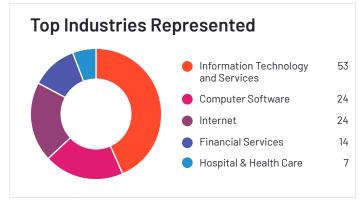


Splunk Enterprise



Splunk Enterprise has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 92% of users rated it 4 or 5 stars, 78% of users believe it is headed in the right direction, and users said they would be likely to recommend Splunk Enterprise at a rate of 85%. Splunk Enterprise is also in the Hardware Monitoring, Application Performance Monitoring (APM), Log Analysis, ServiceNow Store Apps, and Enterprise Monitoring categories.







Ownership Splunk



HQ Location San Francisco, CA



Year Founded 2003



Total Revenue \$2,359 (USD MM)



Employees (Listed On Linkedin™)
6777



Company Website www.splunk.com



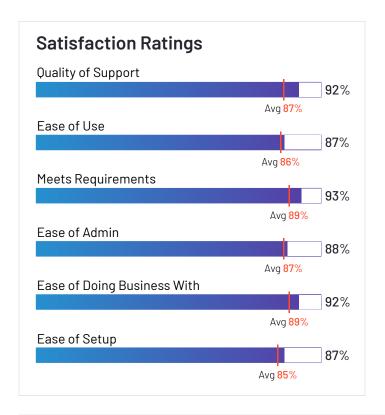


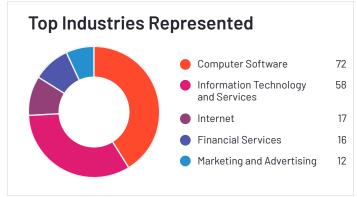
PagerDuty





PagerDuty has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. PagerDuty received the highest Satisfaction score among products in AlOps Platforms. 97% of users rated it 4 or 5 stars, 82% of users believe it is headed in the right direction, and users said they would be likely to recommend PagerDuty at a rate of 90%. PagerDuty is also in the Incident Management, IT Alerting, and ServiceNow Store Apps categories.











HQ LocationSan Francisco, CA



Year Founded 2009



Employees (Listed On Linkedin™)

798



Company Website www.pagerduty.com

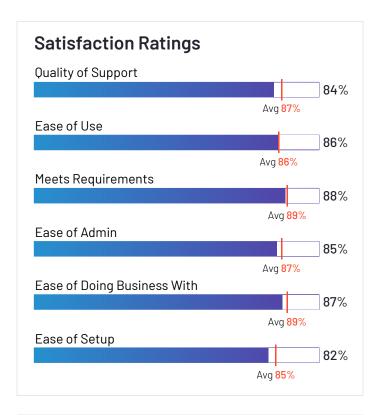


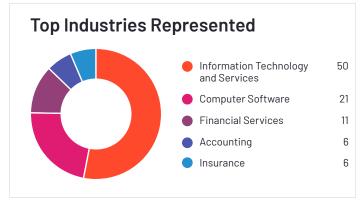


AppDynamics

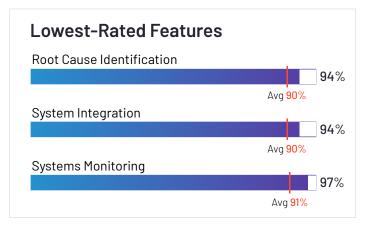


AppDynamics has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 95% of users rated it 4 or 5 stars, 86% of users believe it is headed in the right direction, and users said they would be likely to recommend AppDynamics at a rate of 84%. AppDynamics is also in the SAP App Center, Application Performance Monitoring (APM), Container Monitoring, and ServiceNow Store Apps categories.













HQ LocationSan Francisco, CA



Year Founded 2008



Employees (Listed On Linkedin™)
2037



Company Website www.appdynamics.com



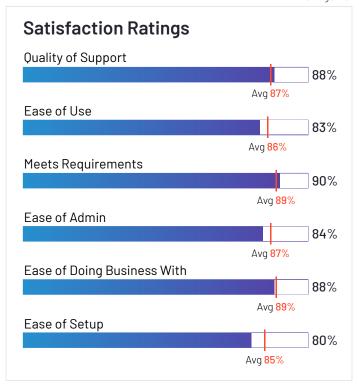


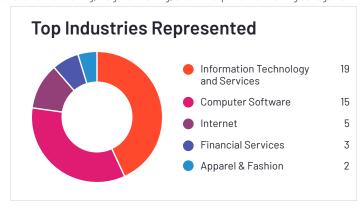
Datadog



2021

Datadog has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 95% of users rated it 4 or 5 stars, 87% of users believe it is headed in the right direction, and users said they would be likely to recommend Datadog at a rate of 86%. Datadog is also in the Network Traffic Analysis (NTA), Security Information and Event Management (SIEM), Incident Response, Network Monitoring, Application Performance Monitoring (APM), API Marketplace, Log Analysis, Container Monitoring, IT Alerting, Cloud Infrastructure Monitoring , Website Monitoring, IoT Analytics, IoT Device Management, Database Monitoring, Log Monitoring, and Enterprise Monitoring categories.







OwnershipDatadog



HQ Location New York, NY



Year Founded 2010



Employees (Listed On Linkedin™)
2174



Company Website www.datadoghq.com



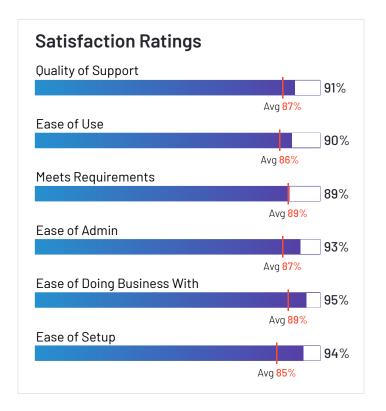


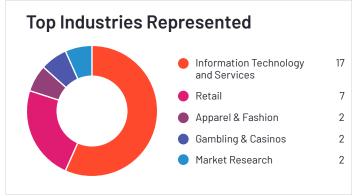
Instana





Instana has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 98% of users rated it 4 or 5 stars, 86% of users believe it is headed in the right direction, and users said they would be likely to recommend Instana at a rate of 90%. Instana is also in the Container Monitoring, Log Analysis, Cloud Infrastructure Monitoring, and Application Performance Monitoring (APM) categories.







Ownership Instana



HQ Location Chicago, IL



Year Founded 2015



Employees (Listed On Linkedin™)

162



Company Website www.instana.com

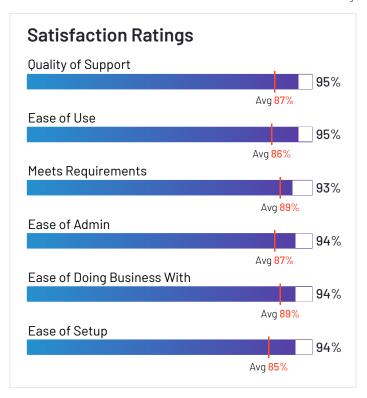


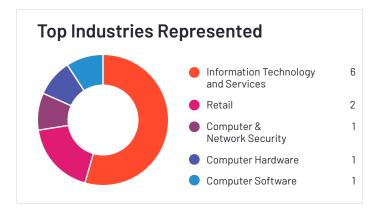


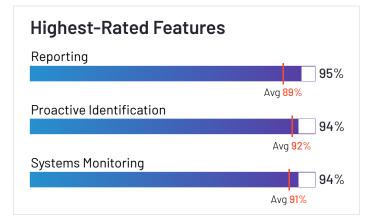
LogicMonitor

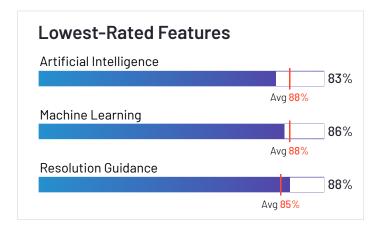


Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend LogicMonitor at a rate of 99%. LogicMonitor is also in the Log Monitoring, Network Monitoring, Application Performance Monitoring (APM), Log Analysis, Container Monitoring, ServiceNow Store Apps, Cloud Infrastructure Monitoring, Website Monitoring, and Enterprise Monitoring categories.











LogicMonitor



HQ Location

Santa Barbara, CA



Year Founded 2007



Employees (Listed On Linkedin™) 657



Company Website www.logicmonitor.com

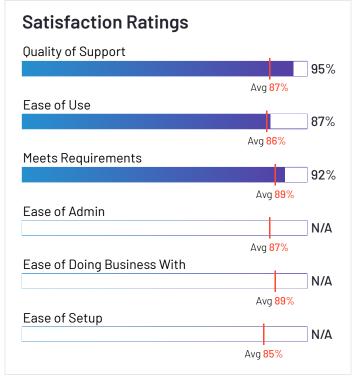


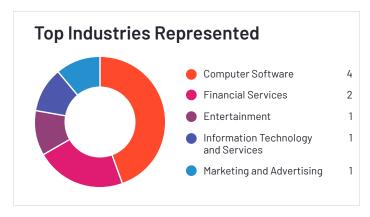


Splunk Cloud

4.4 ★★★★ (17)

Splunk Cloud has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 91% of users rated it 4 or 5 stars, 88% of users believe it is headed in the right direction, and users said they would be likely to recommend Splunk Cloud at a rate of 87%. Splunk Cloud is also in the Application Performance Monitoring (APM) category.





*N/A is displayed when fewer than five responses were received for the question.



Ownership Splunk



HQ Location San Francisco, CA



Year Founded 2003



Total Revenue \$2,359 (USD MM)



Employees (Listed On Linkedin™)
6777



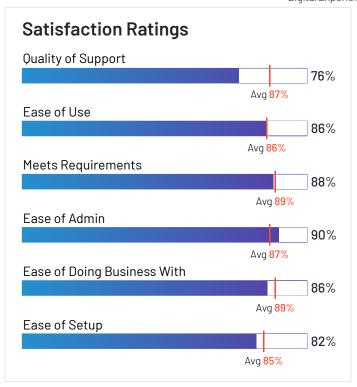
Company Website www.splunk.com





Micro Focus Operations Bridge (OpsBridge)

4.2 ★★★★☆ (33) Micro Focus Operations Bridge (OpsBridge) has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 86% of users believe it is headed in the right direction, and users said they would be likely to recommend Micro Focus Operations Bridge at a rate of 86%. Micro Focus Operations Bridge is also in the Application Performance Monitoring (APM), Incident Management, Log Analysis, Container Monitoring, IT Alerting, Cloud Infrastructure Monitoring, Digital Experience Monitoring (DEM), Database Monitoring, and Enterprise Monitoring categories.







Ownership Micro Focus



HQ Location Newbury, Berkshire



Year Founded 1976



Total Revenue \$4,754 (USD MM)



Employees (Listed On Linkedin™)



Company Website www.microfocus.com

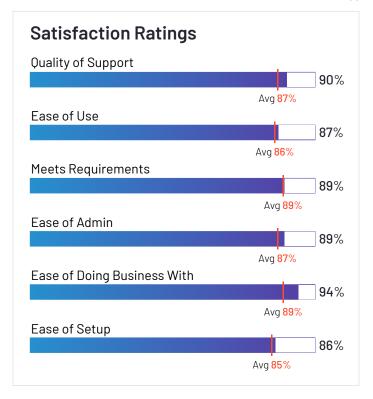
9513

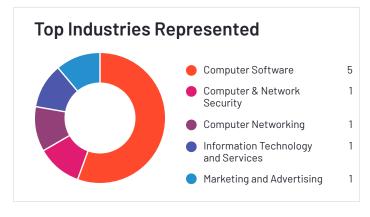






BigPanda has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 90% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend BigPanda at a rate of 84%. BigPanda is also in the Incident Management, IT Alerting, and ServiceNow Store Apps categories.







Ownership BigPanda



HQ LocationMountain View, CA



Year Founded 2012



Employees (Listed On Linkedin™) 171



Company Website bigpanda.io

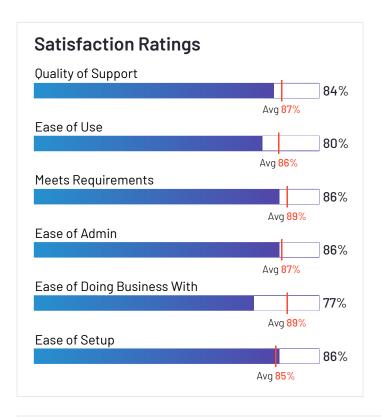


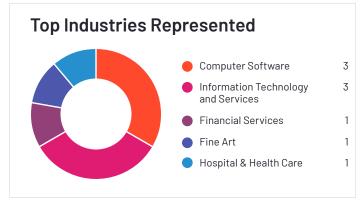


Splunk Light

4.3 ★★★★ (17)

Splunk Light has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 92% of users believe it is headed in the right direction, and users said they would be likely to recommend Splunk Light at a rate of 84%. Splunk Light is also in the Log Analysis category.







Ownership Splunk



HQ Location San Francisco, CA



Year Founded 2003



Total Revenue \$2,359 (USD MM)



Employees (Listed On Linkedin™)
6777



Company Website www.splunk.com

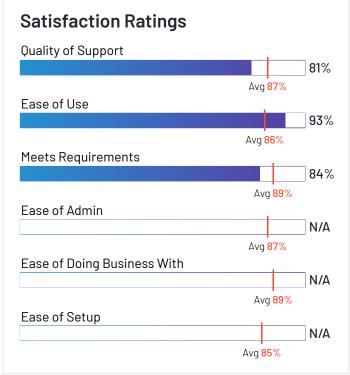


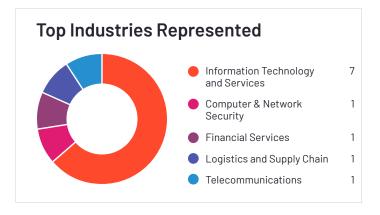


Moogsoft

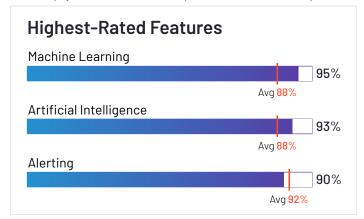


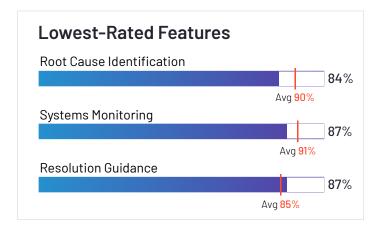
Moogsoft has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 90% of users believe it is headed in the right direction, and users said they would be likely to recommend Moogsoft at a rate of 89%. Moogsoft is also in the IT Alerting, Incident Management, and ServiceNow Store Apps categories.













222



Ownership Moogsoft

HQ LocationSan Francisco, CA

Year Founded 2012

Employees (Listed On Linkedin™) 157 Company Website www.moogsoft.com

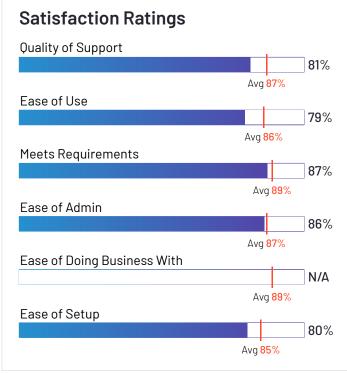


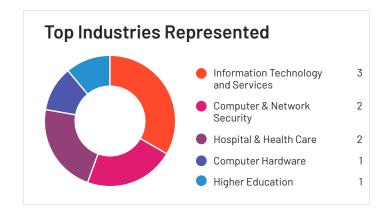


Zenoss



Zenoss has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 80% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Zenoss at a rate of 80%. Zenoss is also in the Network Monitoring and Cloud Infrastructure Monitoring categories.





*N/A is displayed when fewer than five responses were received for the question.



Ownership Zenoss



HQ LocationAustin, TX



Year Founded 2005



Employees (Listed On Linkedin™) 119

Company Website www.zenoss.com



Satisfaction Ratings for AlOps Platforms

G2 reviewers rated software sellers' ability to satisfy their needs as shown in the table below.

	Satisfaction			Satis	faction by C	ategory			Net Promoter Score (NPS)	
	Likely to Recommend	Product Going in Right Direction?	Meets Requirements	Ease of Admin	Ease of Doing Business	Quality of Support	Ease of Setup	Ease of Use	Net Promoter Score (NPS) (Range from -100 to +100)	
Dynatrace	89%	93%	90%	85%	89%	89%	87%	85%	66	
Splunk Enterprise	85%	78%	90%	83%	89%	86%	81%	82%	43	
PagerDuty	90%	82%	93%	88%	92%	92%	87%	87%	66	
AppDynamics	84%	86%	88%	85%	87%	84%	82%	86%	45	
Datadog	86%	87%	90%	84%	88%	88%	80%	83%	50	
Instana	90%	86%	89%	93%	95%	91%	94%	90%	73	
LogicMonitor	99%	100%	93%	94%	94%	95%	94%	95%	100	
Splunk Cloud	87%	88%	92%	N/A	N/A	95%	N/A	87%	63	
Micro Focus Operations Bridge	86%	86%	88%	90%	86%	76%	82%	86%	63	
BigPanda	84%	100%	89%	89%	94%	90%	86%	87%	40	
Splunk Light	84%	92%	86%	86%	77%	84%	86%	80%	42	
Moogsoft	89%	90%	84%	N/A	N/A	81%	N/A	93%	72	
Zenoss	80%	100%	87%	86%	N/A	81%	80%	79%	20	
Average	87%	90%	89%	87%	89%	87%	85%	86%	57	

^{*}N/A is displayed when fewer than five responses were received for the question.

^{**}Net Promoter Score ranges from -100 to +100



Additional Data for AlOps Platforms

The table below includes a breakdown of the customer segments for each product, as represented by G2 reviewers.

Customers by Size

	Small Business (50 or fewer emp.)	Mid-Market (51-1000 emp.)	Enterprise (>1000 emp.)
Dynatrace	5%	19%	75%
Splunk Enterprise	4%	32%	64%
PagerDuty	18%	44%	38%
AppDynamics	17%	33%	50%
Datadog	13%	59%	28%
Instana	7%	33%	61%
LogicMonitor	17%	42%	42%
Splunk Cloud	9%	27%	64%
Micro Focus Operations Bridge	0%	0%	100%
BigPanda	0%	30%	70%
Splunk Light	50%	36%	14%
Moogsoft	0%	18%	82%
Zenoss	10%	20%	70%
Average	11%	30%	58%

(Additional Data for AIOps Platforms continues on next page)

^{*}N/A is displayed when fewer than five responses were received for the question or when data is not publicly available.



Additional Data for AlOps Platforms (continued)

The table below highlights implementation and deployment data as indicated in real user reviews on G2.

Implementation

	Deployment		Implementation Time	Imp	ementation Me	thod	Number of Users Purchased	Contract Term
	Cloud	On- Premise	Avg. Months to Go Live	In-House Team	Seller Services Team	Third-Party Consultant	Median Number of Users Bought	Avg. Contract Term (Months)
Dynatrace	52%	48%	3.1	74%	21%	2%	37	20
Splunk Enterprise	33%	67%	2.5	78%	18%	4%	175	17
PagerDuty	78%	22%	1.4	96%	4%	0%	17	9
AppDynamics	58%	42%	2.8	81%	15%	2%	37	18
Datadog	89%	11%	1.8	81%	19%	0%	37	8
Instana	91%	9%	2.8	90%	5%	0%	56	20
LogicMonitor	86%	14%	2.6	71%	29%	0%	56	26
Splunk Cloud	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Micro Focus Operations Bridge	14%	86%	2.5	100%	0%	0%	17	19
BigPanda	80%	20%	N/A	63%	25%	0%	N/A	N/A
Splunk Light	60%	40%	N/A	N/A	N/A	N/A	N/A	N/A
Moogsoft	40%	60%	N/A	70%	20%	10%	N/A	N/A
Zenoss	0%	100%	N/A	100%	0%	0%	N/A	N/A

(Additional Data for AIOps Platforms continues on next page)

^{*}N/A is displayed when fewer than five responses were received for the question or when data is not publicly available.



Additional Data for AlOps Platforms (continued)

The table below highlights the average user adoption of each product as indicated in real user reviews on G2.

User Adoption and Return on Investment (ROI)

	User Adoption	Payback Period
	Average User Adoption	Estimated ROI (payback period in months)
Dynatrace	47%	21
Splunk Enterprise	61%	20
PagerDuty	71%	10
AppDynamics	50%	19
Datadog	51%	14
Instana	66%	15
LogicMonitor	79%	10
Splunk Cloud	N/A	N/A
Micro Focus Operations Bridge	24%	N/A
BigPanda	N/A	N/A
Splunk Light	N/A	N/A
Moogsoft	N/A	N/A
Zenoss	N/A	N/A
Average	56%	16

(Additional Data for AIOps Platforms continues on next page)

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Additional Data for AlOps Platforms (continued)

The table below highlights third-party market presence data used to inform the G2's Market Presence Score that highlights each product's impact and influence in the category.

Market Presence

	Seller Name	Year Founded	Revenue (\$MM)	Employees on LinkedIn (Seller)	LinkedIn Followers	Twitter Followers (Seller)	Glassdoor Rating	Alexa Web Traffic Rank
Dynatrace	Dynatrace	2005	N/A	2,507	58,497	17,007	4.5	21,330
Splunk Enterprise	Splunk	2003	\$2,359	6,777	304,368	69,079	4.1	11,164
PagerDuty	PagerDuty	2009	N/A	798	20,472	25,907	4.6	17,084
AppDynamics	AppDynamics	2008	N/A	2,037	72,223	22,905	4.4	23,376
Datadog	Datadog	2010	N/A	2,174	60,488	30,163	3.7	4,631
Instana	Instana	2015	N/A	162	3,634	3,833	4.8	247,793
LogicMonitor	LogicMonitor	2007	N/A	657	11,248	3,856	4.5	69,268
Splunk Cloud	Splunk	2003	\$2,359	6,777	304,368	69,079	4.1	11,164
Micro Focus Operations Bridge	Micro Focus	1976	\$4,754	9,513	90,387	40,182	3.1	14,900
BigPanda	BigPanda	2012	N/A	171	7,157	3,052	4.6	103,537
Splunk Light	Splunk	2003	\$2,359	6,777	304,368	69,079	4.1	11,164
Moogsoft	Moogsoft	2012	N/A	157	7,977	2,198	3.9	270,249
Zenoss	Zenoss	2005	N/A	119	5,787	16,950	3.8	754,103

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