



INTRICATELY'S 2021 CLOUD MARKET REPORT:  
**STATE OF THE CLOUD HOSTING MARKET**

# ABOUT INTRICATELY MARKET REPORTS

Intricate's data platform provides an unparalleled view into the cloud. Our cloud market reports provide insights into every cloud vertical, region, and market, helping cloud sellers identify new opportunities and accelerate their go-to-market programs.

As the authoritative source of cloud product adoption, usage, and spend data, Intricate gives cloud sales and marketing teams an unfair advantage in finding and acquiring new customers, building advanced scoring models, getting proactive notification of sales cycles, and spotting churn before it happens.

## Top Cloud Sellers Rely on Intricate Data



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# 2021 GLOBAL CLOUD HOSTING MARKET AT A GLANCE

Intricate's cloud data empowers go-to-market teams with a granular view into the various sectors of the cloud infrastructure market.

With this focused lens, Intricate has identified over 1.5 Million businesses that are purchasing cloud hosting services, with a total value of \$108 Billion.\* Gartner predicts IaaS spending to more than double this by 2025.

Continued increasing cloud adoption across regions - coupled with the rise of multi-cloud and personalized cloud services – will lead to sustained market growth in 2021 and beyond.

**Read on for Intricate's full analysis.**

\*\$108 Billion cloud hosting market size excludes Content Delivery, Security, Performance Management (APM), Video Platform (OVP), DNS and Traffic Management markets.

## CLOUD MARKET FORECAST:

**23%**

Cloud Market Growth  
In 2021

**\$692 Billion**

Cloud Market Size  
by 2025

**\$223 Billion**

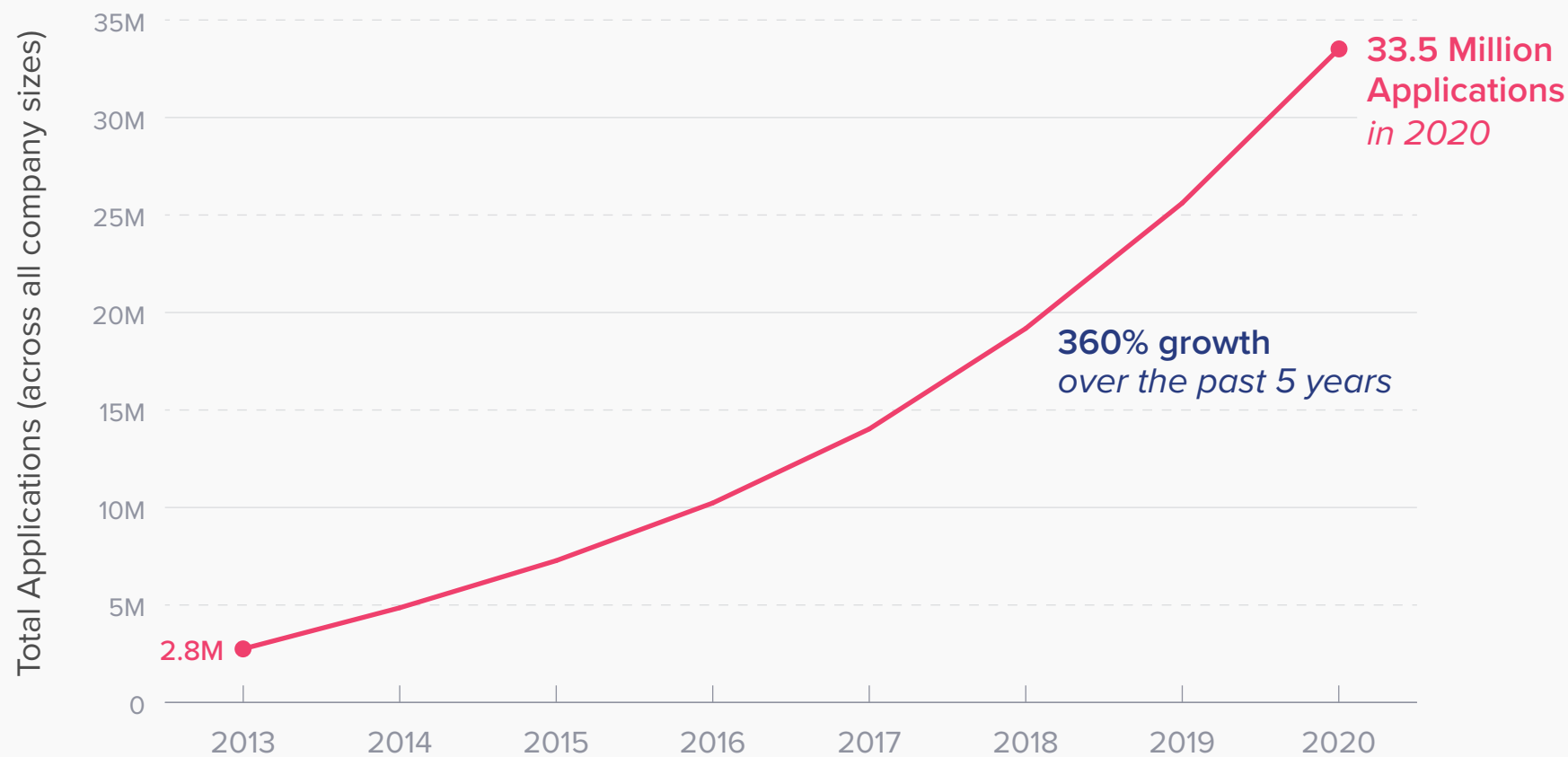
IaaS Spending  
by 2025

Source: Gartner Cloud Forecast, 1Q21

# 2021 GLOBAL CLOUD HOSTING MARKET AT A GLANCE

## Global Growth of Cloud Infrastructure Market From 2013 to 2021

Cumulative Number of Applications Worldwide



Source: Intracately data, April 2021

### INTRICATELY INSIGHT

Intracately data shows the number of cloud applications deployed worldwide grew from 25.6 Million to 33.5 Million from 2019 to 2020.

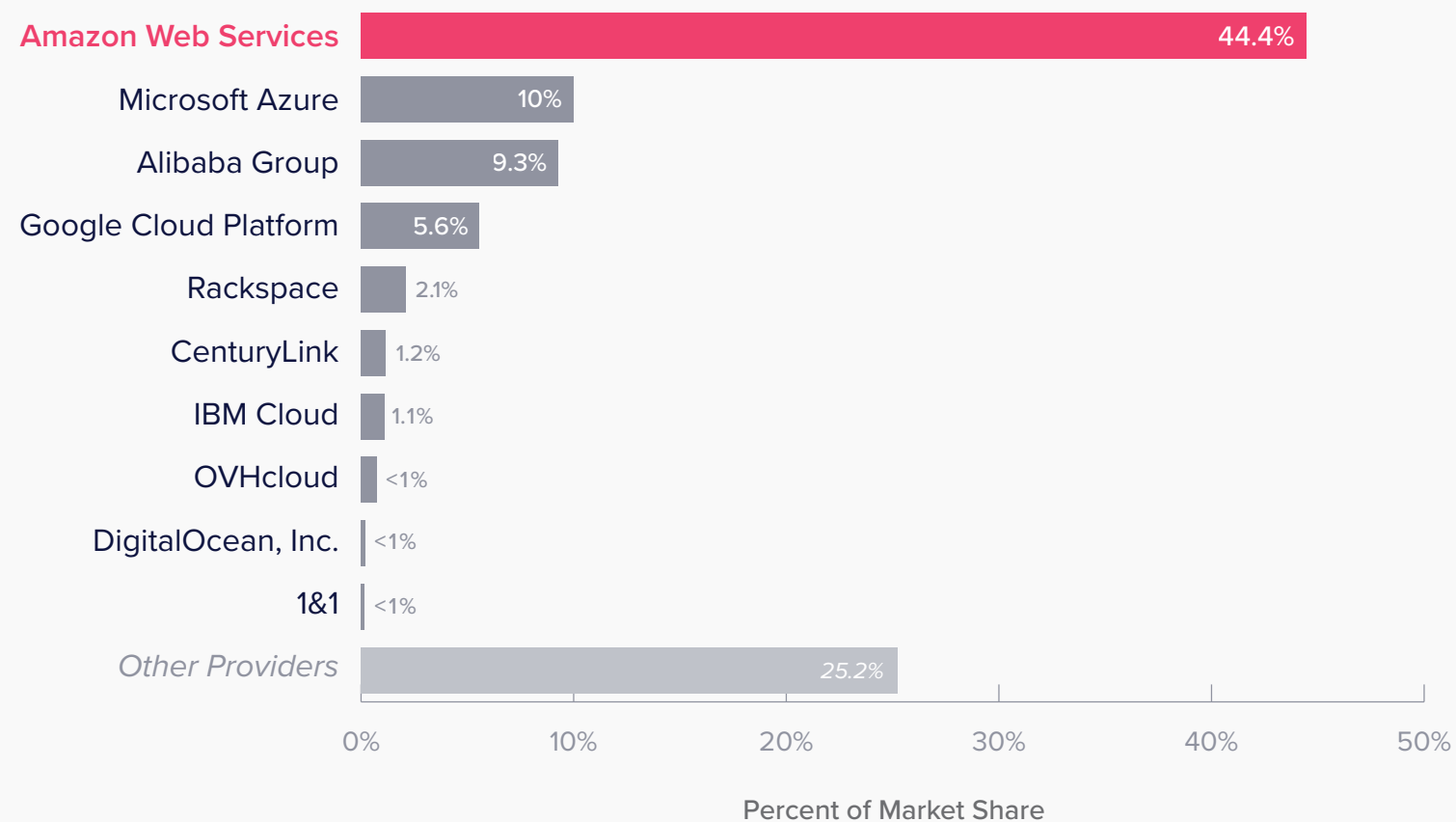
In the past five years, the growth of applications deployed in the cloud was 360%.

Read on to see the cloud market segments in which cloud hosting leaders are seeing the most growth.

# LEADING PROVIDERS IN THE GLOBAL CLOUD HOSTING MARKET

## Market Share Of Leading Cloud Hosting Providers

Top 10 Providers by Total 2020 Market Share



Source: Intricately data, April 2021

### INTRICATELY INSIGHT

Intricately data reveals that the four leading cloud hosting providers account for nearly 70% of the market.

The rise of multi-cloud is a contributing growth factor, with buyers investing in multiple cloud hosting providers - which we'll discuss later in the report.

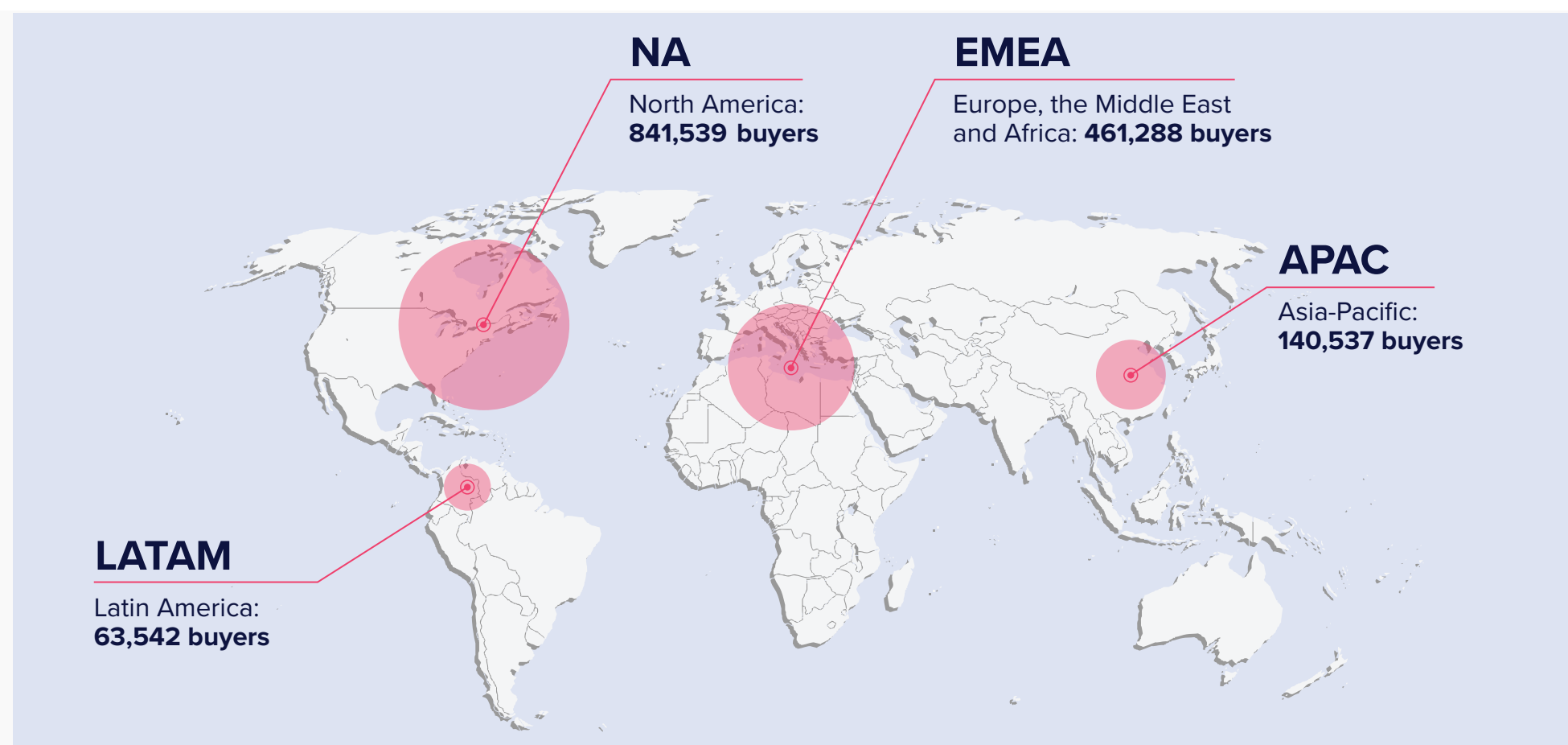
Just over 25% of cloud hosting demand is not being met by the leading 10 providers.

To review a 2021 cloud hosting market data sample, **contact us.**

# CLOUD MARKET IS GROWING ACROSS ALL GLOBAL REGIONS

## Size of Regional Cloud Infrastructure Markets

Number of 2021 Cloud Buyers by Region



Source: Intracately data, April 2021

### INTRICATELY INSIGHT

Intracately's 2021 regional cloud market snapshots examined the growth of the cloud market by buyer count and by wallet share. In these regional snapshots Intracately uncovered massive opportunity for cloud infrastructure growth, notably in untapped opportunities in LATAM and APAC.

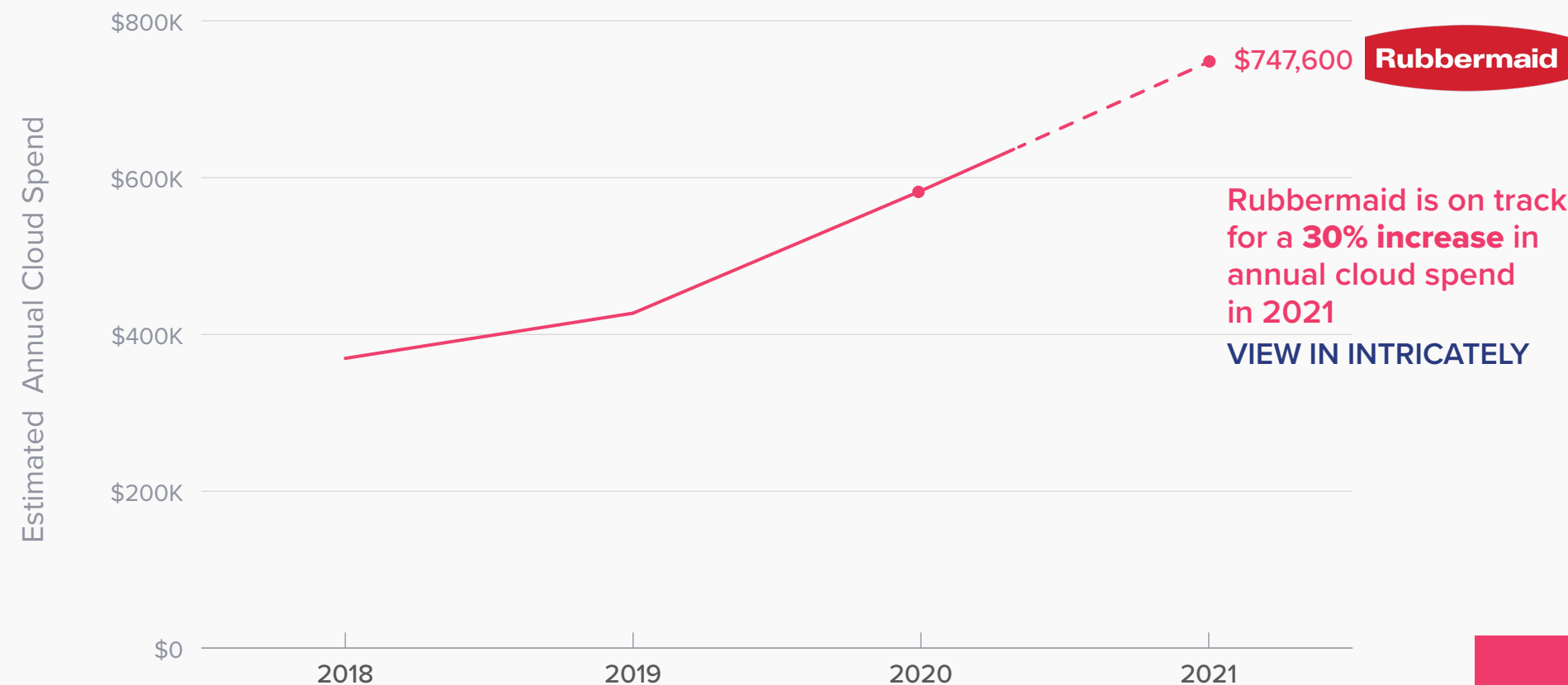
The map on the left summarizes the quantity of cloud buyers in each region. For a deeper dive into exactly who these buyers are, you can download our regional reports.

[Browse Intracately's 2021 Regional Market Snapshots](#)

# GLOBAL INDUSTRIES INCREASING THEIR CLOUD SPEND

## Sample Cloud Vertical Spotlight: Manufacturing

### Growth of Rubbermaid's Cloud Spend Over Time



Source: Intricate data, April 2021

### INTRICATELY INSIGHT

Intricate data has seen significant cloud adoption and spend growth across industries previously considered cloud laggards.

Manufacturers, for example, are rapidly adopting hybrid cloud solutions as a long-term investment in infrastructure. The chart on the left shows Intricate's view into the cloud growth of Rubbermaid. The company more than doubled its monthly cloud infrastructure spend since 2019.

Intricate can show you the cloud hosting spend of any company in any industry. **Get in touch with us.**



# GLOBAL CLOUD GROWTH ACCELERATED BY COVID-19

## Increase in Cloud Spend Among Multiple Verticals

The global demand for secure remote technology driven by the global pandemic led to a massive acceleration of cloud adoption.

As the global economy emerges from the pandemic, this location-agnostic flexibility of technology has become the new normal. This shift is fueling the growth of **edge computing** and standardizing the move to the cloud across all industries.

*Intricately can see the cloud adoption, usage and spend data of any specific company or industry. Let's examine the cloud footprint of four companies who saw significant growth due to the global pandemic.*



### ETSY

Est. monthly cloud spend: **\$10M**

Cloud hosting providers:

[VIEW IN INTRICATELY](#)



### LOWE'S

Est. monthly cloud spend:

[VIEW IN INTRICATELY](#)

Cloud hosting providers:

**Rackspace, Amazon EC2, & more**



### MODERNA

Est. monthly cloud spend: **\$58K**

Cloud hosting providers:

[VIEW IN INTRICATELY](#)



### INSTACART

Est. monthly cloud spend:

[VIEW IN INTRICATELY](#)

Cloud hosting providers:

**Amazon EC2, Google, & more**

# MARKET COMMODITIZATION IS INCREASING

## Buyer Demand for Personalized Cloud Solutions Is On The Rise

The cloud infrastructure market is quickly becoming commoditized. As quality standards increase, so do buyer expectations for ease-of-use and flexibility. This has led to providers offering - and many buyers demanding - personalized solutions.



Intricately customer **Snowflake** specialized their cloud computing product, creating a new high-margin data cloud that better served the demand of the market.



**Amazon Web Services** is another leader in the personalization of cloud services, providing specialized solutions by use-case, organization type or industry.

There are a multitude of benefits of these specialized cloud solutions for buyers:

- ▶ **RESOURCING:** Companies no longer need the same internal resources (i.e., data scientist team)
- ▶ **AUTOMATION:** The burden of running and operating their solutions is lessened for companies
- ▶ **RELEVANCY:** Solutions are custom-built for their needs and easier to use

Intricately can map individual use cases of cloud infrastructure for the entire cloud. **Contact us today to find your ideal targets.**

# MULTI-CLOUD IMPLEMENTATIONS ARE ON THE RISE

Accelerated By Containerization, this Increases Market Opportunity

Containerization has taken complexity out of the implementation of cloud services. Multiple cloud applications are able to be run in containers, using a shared operating system. By the end of 2021, **Forrester** predicts that 60% of companies will leverage containers on public cloud platforms.

This shift has increased flexibility and scalability, and is one of the key drivers empowering buyers to leverage multi-cloud implementations.

**Intricately data shows that multi-cloud adoption among Enterprise businesses has been steadily increasing since 2016.**

## FOR CLOUD BUYERS:

This trend is a huge win. The rise of multi-cloud means more flexibility and lower prices.

## FOR CLOUD SELLERS:

There are pros and cons. Multi-cloud increases the number of potential customers. But streamlined implementation capabilities can also increase potential for churn.

## Multi-Cloud Strategy Spotlight:



### PELOTON INTERACTIVE

Est. monthly cloud spend: **\$342K/ mo.**  
Cloud Hosting Providers: **Amazon EC2, Google, IBM Softlayer, +9 more**

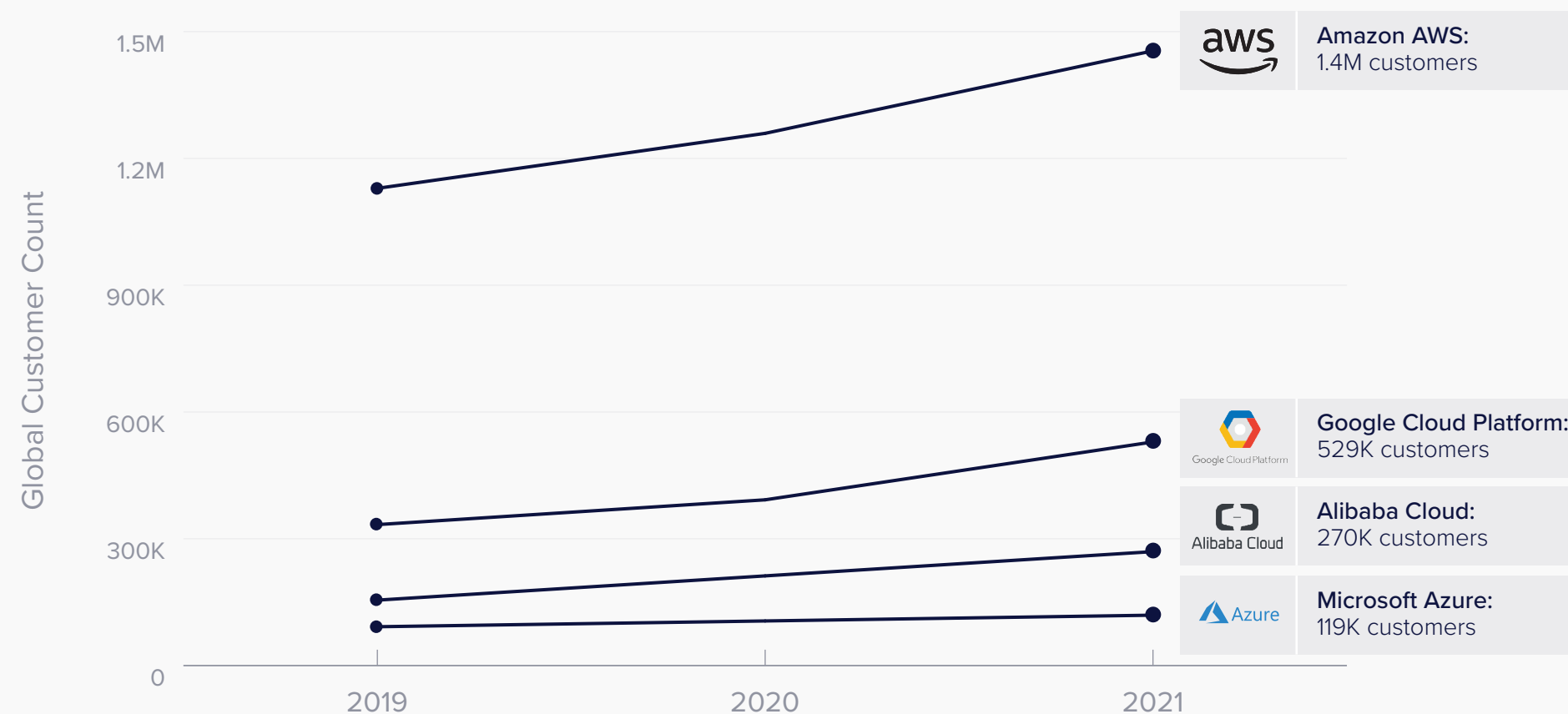
[VIEW IN INTRICATELY](#)

# GROWTH OF LEADING CLOUD HOSTING PROVIDERS

## Top Providers Increasing Customer Base Across Market Segments

### Customer Growth of Leading Cloud Hosting Providers

Global Customer Count from 2019 to 2021



Source: Intricately data, April 2021

### INTRICATELY INSIGHTS

- ▶ **AWS** remains the global market leader with over 1.3 Million global customers.
- ▶ **Google Cloud Platform** grew 131% among startups since 2019.
- ▶ **Alibaba Cloud** is expanding globally with over 80% year over year growth in North America and EMEA.
- ▶ **Microsoft Azure** saw year over year growth of 237% in the SMB space.

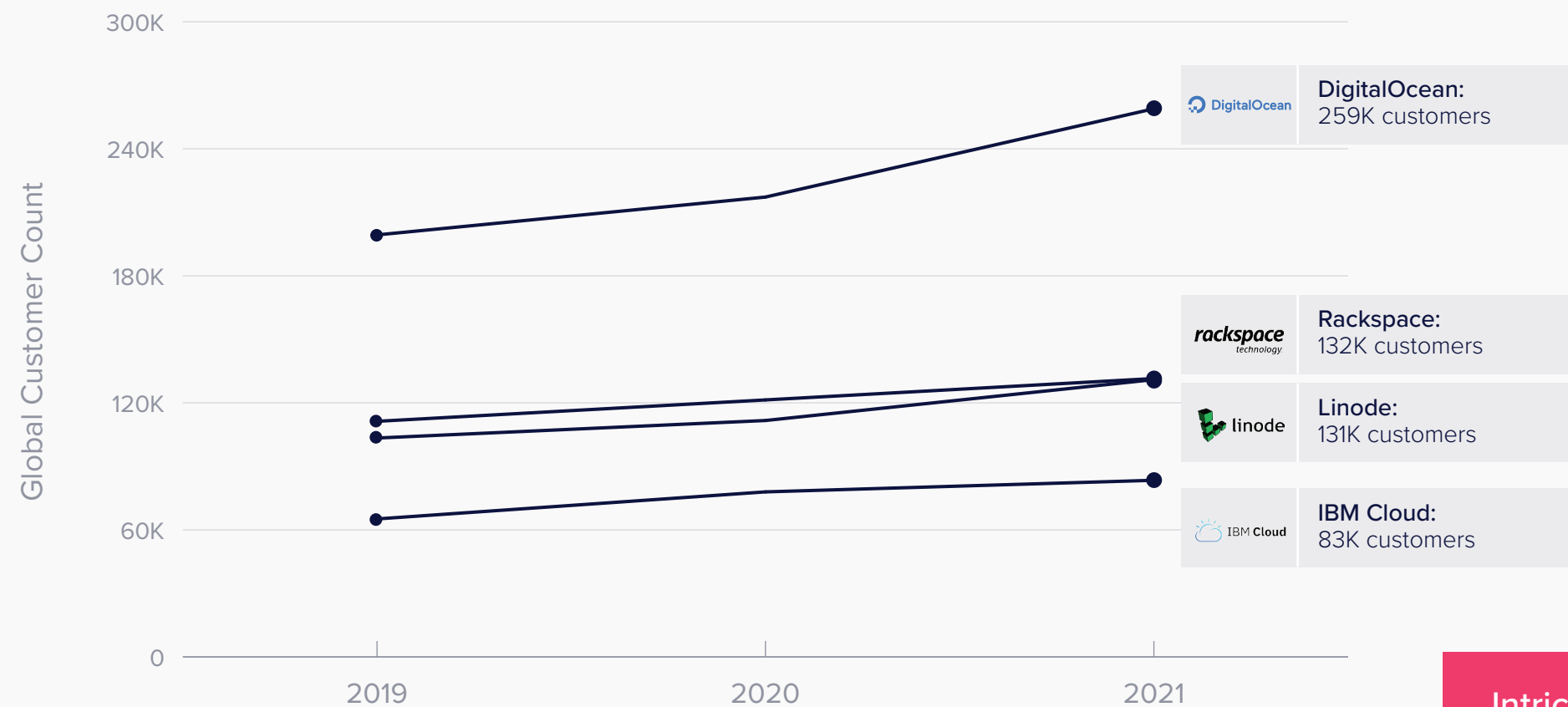
To review a 2021 cloud hosting market data sample, [contact us](#).

# SELECTED FAST-GROWING CLOUD HOSTING PROVIDERS

Sellers Across the Market Are Expanding Their Customer Base

## Cloud Hosting Providers To Watch

Global Customer Count from 2019 to 2021



Source: Intracately data, April 2021

## INTRICATELY INSIGHTS

### DigitalOcean, Inc.

- ▶ Number of customers spending \$20K+ monthly: **18K**

### Rackspace

- ▶ Number of customers spending \$20K+ monthly: **17K**

### Linode

- ▶ Number of customers spending \$20K+ monthly: **8K**

### IBM Cloud

- ▶ Number of customers spending \$20k+ monthly: **2K**

These four providers all have the largest regional presence in North America.

Intracately data reveals the best opportunities in the cloud infrastructure landscape. **Contact us to learn more.**

# USE INTRICATELY DATA TO UNDERSTAND THE OPPORTUNITIES IN THE CLOUD HOSTING MARKET

Intricate.ly's analysis of the 2021 cloud infrastructure market shows the following insights for cloud providers:



## GROW GLOBALLY

Capitalize on rapid regional growth in APAC and LATAM.



## IDENTIFY NEW INDUSTRY DEMAND

Invest resources in sectors where the pandemic accelerated cloud growth.



## CUSTOMIZE YOUR POSITIONING

Develop personalized marketing messages based on use-case data.



## UNDERSTAND MULTI-CLOUD

Adjust selling strategies for buyers embracing multi-cloud.

Intricate.ly partners with cloud sales and marketing teams to develop the most impactful go-to-market strategies for their business. **Contact us to schedule a demo and discover your best opportunities for revenue growth.**

# GET CUSTOMIZED CLOUD MARKET INSIGHTS

Intracately gives cloud sales and marketing teams an unfair advantage in finding and acquiring new customers, building advanced scoring models, getting proactive notification of sales cycles, and spotting churn before it happens.

Our customers use the Intracately data platform to:

- Identify their ideal customer profile
- Define their total addressable market
- Implement territories and account plans for global sales teams
- Execute sophisticated marketing programs to drive growth
- Assess performance against competitors
- Prioritize your account-based marketing and sales efforts

Schedule a demo to learn how to use Intracately's detailed product adoption, usage, and spend data to focus your prospecting and prioritization efforts.

**CONTACT US AT:**

650-600-1834

[learnmore@intracately.com](mailto:learnmore@intracately.com)

**TOP CLOUD SELLERS RELY ON INTRICATELY DATA**

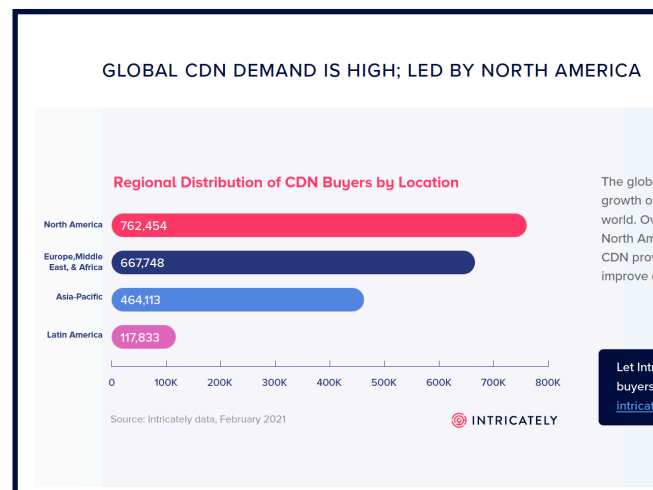


# LOOKING FOR MORE DATA?

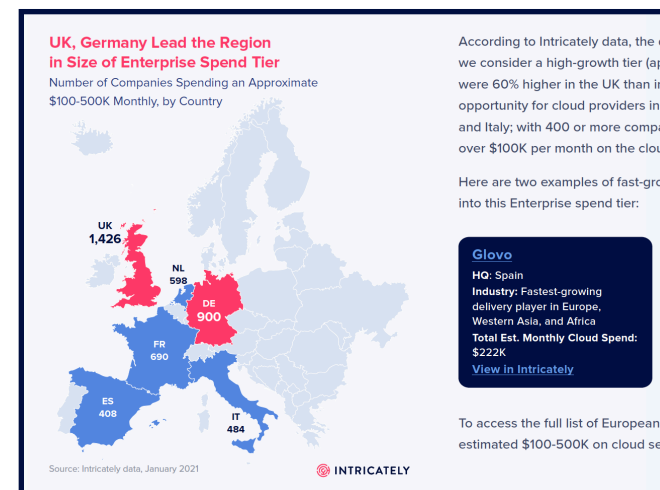
Read Intricate's Full Library of Cloud Market Reports, Including:

## 2021 INTRICATELY CLOUD MARKET REPORTS:

### State of the Edge Computing Market



### Cloud Market Regional Snapshot: EMEA



### Cloud Market Regional Snapshot: LATAM

