

Sales Performance Management Market by Component (Solutions (Incentive Compensation Management, Territory Management), Services), Organization Size, Deployment Mode, Vertical (BFSI, Telecommunications, & Manufacturing) and Region - Global Forecast to 2028

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Abstracts

The SPM market size is expected to grow from USD 2.3 billion in 2023 to USD 4.4 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 13.6% during the forecast period. The increasing emphasis on sales performance and regulatory compliance requirements drives the SPM market's growth.

As per organization size, the SMEs segment holds the highest CAGR during the forecast period.

The SPM market by organization size is divided into large enterprises and SMEs. The SMEs segment is estimated to hold the highest CAGR during the forecasted period of the SPM market. Due to the lack of awareness and budget constraints, SMEs have been majorly dependent on manual processes to manage their SPM processes. However, the competitive market has encouraged SMEs to invest in automated solutions to achieve high business efficiency. Being constrained by limited budgets, small IT infrastructure, and little staff, SMEs look for flexible, scalable, and cost-effective solutions. Hence, SMEs are increasingly adopting cloud-based SPM solutions, as these solutions eliminate data management hassle and maintenance issues. SMEs are incorporating innovative SPM solutions to manage better quotas and territories and sales employee performance and incentives based on global accounting standards, thereby accelerating employee engagement and enhancing their experience.

As per vertical, consumer goods & retail vertical holds the highest CAGR during the forecast period.

The verticals are segmented into BFSI, consumer goods & retail, telecommunications, manufacturing, IT & ITeS, energy & utilities, travel & hospitality, healthcare & pharmaceuticals, and others (education, real estate & construction, and media & entertainment). The retail & consumer goods vertical is expected to hold the highest CAGR of 16.0% during the forecast period. The consumer goods and retail vertical is highly customer-centric, and companies across this vertical are adopting different penetration strategies and leveraging various industry-ready technologies to enhance customer experience and improve customer retention. Owing to the presence of several players in this vertical, IT budgets are also usually huge as consumer goods and retail companies try to maintain a certain brand image in terms of both employee and customer retention, which is critical to higher revenues. Several retailers and consumer goods companies are leveraging SPM solutions to improve incentive compensation accuracies, eliminate manual management of sales administration tasks, and unify commission data with POS and CRM systems for better visibility.

As per region, Europe holds the second-largest market share during the forecast period.

The SPM market is segmented into five regions: North America, Europe, Asia Pacific, Middle East & Africa, and Latin America. Regarding global SPM market share, Europe holds the second largest market share in 2023 and is expected to have similar dominance over the forecast period. Europe has diverse business needs, as several large retailers and manufacturing companies demand robust and scalable IT infrastructure solutions. The region has always been a challenging market for cloud providers due to the stringent regulations and security standards regarding user data privacy. Europe also has strict rules and regulations for data privacy and security, so various SPM providers have improved their solutions to address companies' data localization needs and comply with consumer privacy regulations in the region. The proliferation of cloud-based sales applications has further stimulated organizations to adopt SaaS-based SPM solutions. The presence of various small and large players in Europe, including Beqom and SAP, is another significant factor for adopting SPM solutions across Europe. In this report, the primary growing economies considered for the analysis are the UK and the rest of Europe.

The breakup of the profiles of the primary participants is given below:

By Company: Tier I: 33%, Tier II: 27%, and Tier III: 40%

By Designation: C-Level Executives: 46%, Director Level: 22%, and Others: 32%

By Region: North America: 40%, Asia Pacific: 27%, Europe: 28%, Rest of World: 5%

Note: Others include sales managers, marketing managers, and product managers

Note: Rest of the World includes the Middle East & Africa, and Latin America

Note: Tier 1 companies have revenues of more than USD 100 million; tier 2 companies' revenue ranges from USD 10 million to USD 100 million; and tier 3 companies' revenue is less than 10 million

Source: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

Some of the major vendors offering SPM solutions and services across the globe are SAP (Germany), Oracle (US), NICE (Israel), Anaplan (US), Xactly (US), Salesforce (US), Varicent (Canada), Optymyze (UK), beqom (Switzerland), Performio (US), Incentives Solutions (Israel), Axtria (US), Iconixx (US), Gryphon Networks (US), ZS (US), CellarStone (US), Board (Switzerland), Zoho (India), InsideSales (US), Accent Technologies (US), Silvon Software (US), CaptivateIQ (US), Spiff (US), Ascent Cloud (Switzerland), Adventace (US), Plecto (Denmark), Spotio (US), SalesScreen (Norway), Central (US), Spinify (US), Ambition (US), Everstage (India), and InnoVyne (US).

Research coverage:

The market study covers the SPM market across segments. It aims at estimating the market size and the growth potential of this market across different segments, such as component (solutions, services), organization size, deployment mode, vertical, and region. It includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall SPM market and the subsegments. This report will help stakeholders understand the competitive landscape

and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (growing automation to improve visibility and avoid calculation inaccuracies, rising demand for metric-driven sales tools, increasing enterprise mobility to increase agent engagement and performance, increasing emphasis on sales performance, regulatory compliance requirements), restraints (skepticism among small and medium-sized enterprises to avoid additional costs or altering of organizational structure, regulatory compliance issues, implementation challenges, data privacy and security concerns), opportunities (integration of audio-video conferencing application programming interfaces to increase personalization and productivity, machine learning and natural language processing innovations to leverage data-driven recommendations, data-driven decision making enables organizations to assess and evaluate the performance of individual sales representatives, sales teams, and territories), and challenges (prevailing apprehensions related to levels of intrusion, complexity associated with Compensation Plans) influencing the growth of the SPM market.

Product Development/Innovation: Detailed insights on upcoming technologies in the SPM market.

Market Development: Comprehensive information about lucrative markets – the report analyses the SPM market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the SPM market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like SAP (Germany), Oracle (US), NICE (Israel), Anaplan (US), and Xactly (US), among others, in the SPM market.

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