



AWS Market Intelligence Report 2025–2026

Strategic Insights into the Global Amazon Web Services Ecosystem

Powered by Span Global Services | January 2026

VERIFIED CONTACTS

3.1M+

COMPANIES

940K+

EMAIL ACCURACY

95.6%



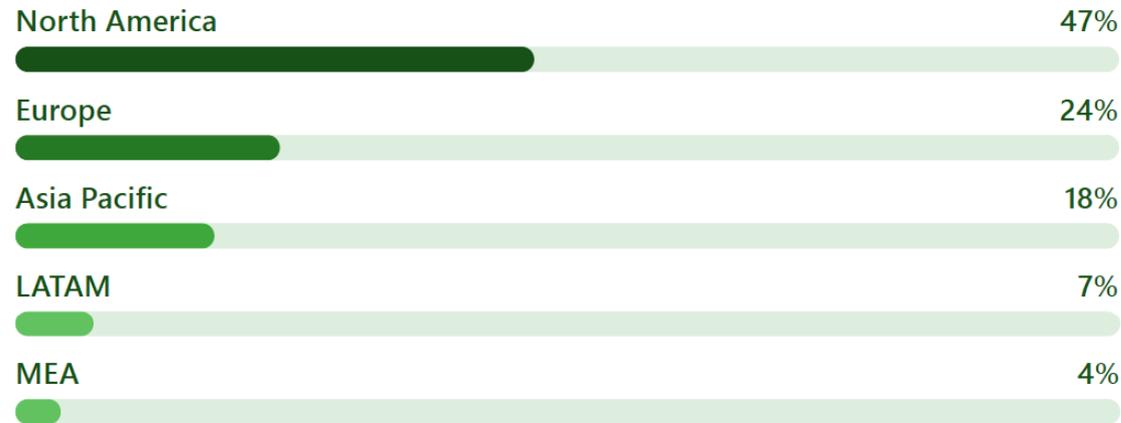
AWS at a Glance

Ecosystem overview and key platform metrics as of January 2026



TOTAL USERS GLOBALLY 11.2M+ Active cloud workload accounts	COMPANIES TRACKED 940K+ Verified business entities	MARKET COVERAGE 54+ Countries with AWS presence	DATA REFRESH CYCLE 60 Days rolling verification	GEOGRAPHIC REACH 6 Continents represented
--	--	---	---	---

Top Regions by AWS Adoption



Source: Span Global Services database, Jan 2026

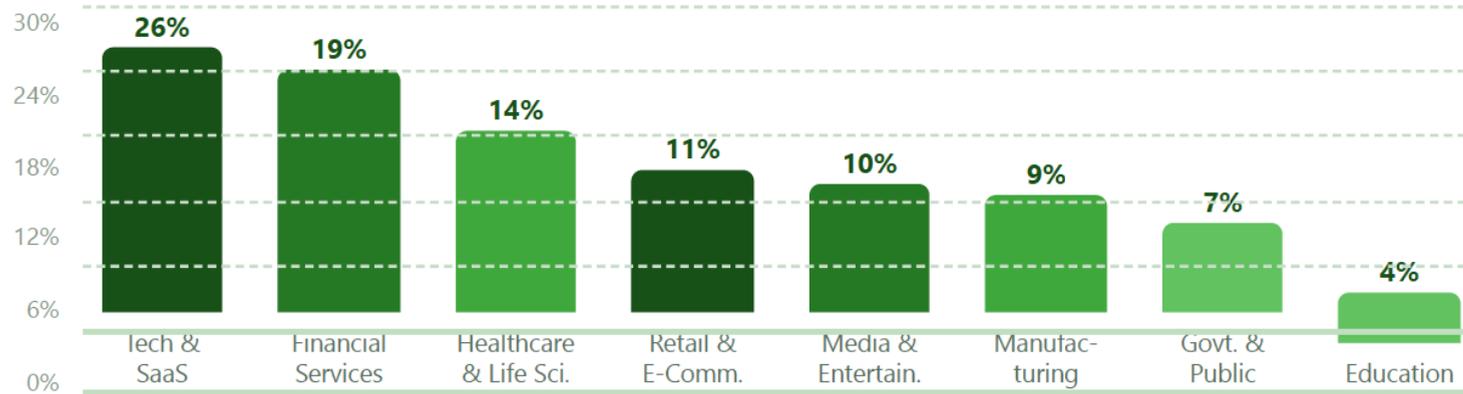
Platform Highlights

- #1 Cloud Infrastructure Platform Globally**
AWS commands over 31% of worldwide cloud infrastructure market share as of 2025.
- 240+ Cloud Services Available**
From compute and storage to AI/ML, IoT, and quantum computing services.
- AWS Marketplace: 12,000+ Listings**
Extensive third-party software catalog spanning security, data, and DevOps tooling.
- Amazon Ecosystem Depth**
Tightly integrated with Amazon Bedrock, SageMaker, QuickSight, and Rekognition.
- 33 Global Regions, 105 Availability Zones**
Industry-leading infrastructure footprint supporting enterprise-grade resilience.

Industry Distribution Analysis

Which sectors rely on AWS most heavily in 2025

Industry Breakdown by Share of AWS Users



Top 3 Industries

Technology & SaaS **26%**

Financial Services **19%**

Healthcare & Life Sciences **14%**

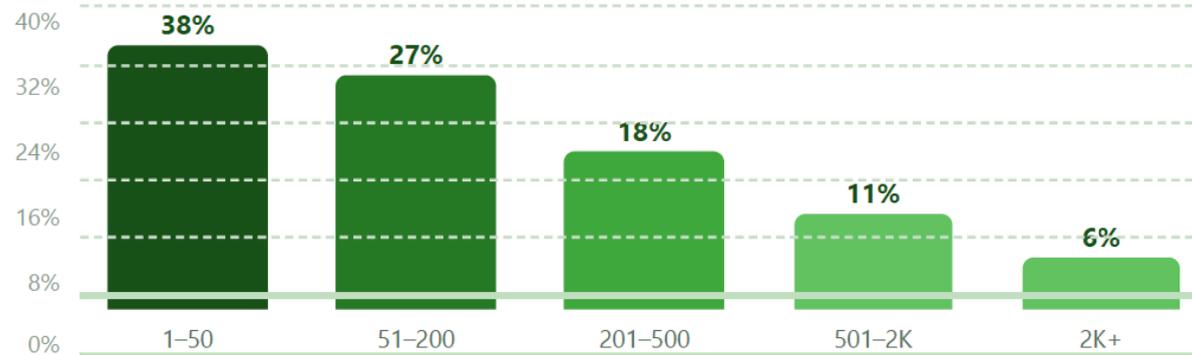
Key Insight

Tech and SaaS companies are the dominant AWS consumers, leveraging elastic compute, serverless architecture, and managed database services to scale globally without upfront infrastructure investment.

Company Segmentation

Size and spend distribution across the AWS customer base

Employee Size Distribution



SMB-DOMINANT BASE

65%

of AWS customers have fewer than 200 employees

MID-SPEND SWEET SPOT

64%

of AWS accounts spend under \$100K annually

Annual AWS Cloud Spend Distribution



Segmentation Insight

While enterprise accounts drive the majority of AWS revenue, the high-volume SMB and mid-market segment represents the broadest addressable opportunity for ISVs, consultants, and managed service providers targeting the AWS ecosystem.

Enterprise Growth Trajectory

The 501-2,000 employee segment is expanding at 18% YoY as organizations migrate legacy workloads and adopt cloud-native architectures.

+18% YoY

Market Trends 2025–2026

Key technology and adoption shifts reshaping the AWS ecosystem

Generative AI Acceleration

Amazon Bedrock now serves 2.8M+ developers. Foundation model adoption via AWS grew 74% in 2025, outpacing all competing cloud AI platforms.

+74% YoY

Multi-Cloud & Hybrid Adoption

52% of AWS enterprise customers now run hybrid architectures using AWS Outposts or EKS Anywhere to bridge on-premise and cloud environments.

52% hybrid

Security & Compliance Spend

AWS Security Hub and GuardDuty deployments rose 41% YoY as data sovereignty regulations tighten across 36 jurisdictions globally.

+41% YoY

FinOps & Cost Optimization

Cloud cost management tooling is now a board-level priority. AWS Cost Explorer usage grew 58% as organizations seek to right-size cloud spend.

+58% YoY

Trend Momentum Indicators

SERVERLESS ADOPTION

68%

Of new workloads use Lambda or Fargate

AI/ML FEATURE UPTAKE

44%

Active Bedrock or SageMaker users

CONTAINER USAGE

71%

Run EKS, ECS, or containerised workloads

MARKETPLACE PURCHASES

59%

Procure 3rd-party software via AWS Marketplace

Convergence Signal: The simultaneous rise of generative AI, tightening compliance mandates, and FinOps discipline is reshaping how AWS buyers evaluate vendors. Timely, verified contact intelligence targeting these decision-makers is critical for capturing market share in 2026.

Strategic Opportunities

High-value market segments within the AWS user ecosystem

Tier 1 Segments

Highest ROI targeting potential

ISVs & SaaS Builders

Software vendors building and distributing products natively on AWS infrastructure

Financial Services & Fintech

Banks, insurers, and fintechs migrating core systems and data pipelines to AWS

Healthcare & Life Sciences

Providers and pharma firms adopting AWS HealthLake and genomics services

Combined addressable: 2.3M contacts

Tier 2 Segments

Strong growth and engagement signals

Manufacturing & Supply Chain

Industrial IoT, digital twin, and predictive maintenance deployments on AWS

Media & Entertainment

Streaming, content delivery, and AI-driven content personalisation workloads

Government & Public Sector

GovCloud deployments supporting FedRAMP-compliant workloads and citizen services

Combined addressable: 1.1M contacts

Opportunity Scorecard

Segment attractiveness rating



Total Opportunity Size

3.4M

Verified, reachable contacts across all segments

Data Quality & The Span Advantage

How Span Global Services delivers superior AWS contact accuracy and depth

Multi-Stage Verification Process

- 1 Technographic Source Aggregation**
Data collected from 250+ verified B2B, cloud intelligence, and AWS Partner Network sources
- 2 AI-Powered Deduplication**
Machine learning identifies and merges duplicate company and contact records across sources
- 3 Human Analyst Verification**
350+ data specialists validate AWS usage signals via direct phone and email outreach
- 4 Real-Time Email Validation**
SMTP-level checks and bounce suppression performed before every data delivery

✓ **Result: 95.6% email deliverability guaranteed**

Compliance & Privacy

✓ **GDPR Compliant**

✓ **CAN-SPAM Certified**

✓ **CCPA Ready**

✓ **CASL Ready**

Email Accuracy Comparison



Hyper-Segmentation

45+ AWS-Specific Data Attributes

Filter by AWS service tier, Marketplace activity, certification level, solution architect seniority, industry vertical, company revenue, and technographic stack.

45+ segmentation filters

Recommendations & Next Steps

Strategic priorities for targeting the AWS ecosystem in 2026

Priority 1 — Lead with ISV & SaaS Builder Outreach

Independent software vendors building on AWS are high-intent buyers of dev tools, security solutions, and cloud management platforms.

Priority 2 — Target Generative AI Adopters

Companies actively using Amazon Bedrock or SageMaker represent a fast-moving, budget-allocated audience for AI-adjacent products and services.

Priority 3 — Engage FinOps & Cloud Finance Teams

Rising cloud spend scrutiny has elevated FinOps practitioners as key decision-makers. Target them with cost optimisation and governance messaging.

Priority 4 — Deploy Account-Based Multi-Channel Campaigns

Combine Span's verified AWS contact data with email, LinkedIn, and intent data signals for precise, high-conversion account-based marketing.

Ready to Access the Full AWS Database?

Contact Span Global Services for a free sample dataset and custom segment consultation tailored to your campaign goals.

www.spanglobalservices.com | info@spanglobalservices.com

Why Span Global Services?

- ✓ 3.1M+ verified AWS contacts
- ✓ 95.6% email deliverability rate
- ✓ 60-day rolling data refresh
- ✓ 45+ hyper-segmentation filters
- ✓ GDPR, CCPA and CAN-SPAM compliant
- ✓ Dedicated account manager support

Trusted by 5,000+ B2B marketers across 60+ countries since 2007

© 2026 Span Global Services. All rights reserved.
Data sourced from proprietary B2B intelligence platform.



2710, Media Center Dr, Bldg#6, Suite 120, Los Angeles, CA 90065

 877) 755-0023

 info@spanglobalservices.com

 www.spanglobalservices.com