# Magic Quadrant for Digital Marketing Analytics

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CMOs and other marketing leaders are asking their analytics teams to provide unified, cross-channel insights that span a wide range of marketing and advertising activities. Digital marketing analytics providers continue to expand the scope and capabilities of their products.

## Market Definition/Description

### Target Audience

This Magic Quadrant is intended for chief marketing officers (CMOs), chief marketing technologists, other digital marketing leaders and analytics practitioners involved in the selection of systems to support digital marketing business requirements.

### Definition

Gartner defines "digital marketing analytics" platforms as:

> Digital marketing analytics platforms are specialized analytic applications used to understand and improve digital channel user experience, and prospect and customer acquisition and behavior, and to optimize marketing and advertising campaigns, with an emphasis on digital channels and techniques. They are stand-alone, end-to-end platforms, performing functions from data collection through analysis and visualization.
>
> They have demonstrated relevance to marketing through their ability to collect and ingest data from common marketing

sources, and provide tools for standard marketing analytics use cases, and have significant adoption by marketing practitioners.

As Gartner defines it, digital marketing analytics encompasses five key areas. These areas represent the crucial ways analytics practitioners and software tools are required to support marketing and advertising efforts to deliver more effective, timely and personalized cross-channel experiences.

- **Data integration:** Marketers must be able to analyze data that sits on different systems and in different locations, in a wide range of forms and formats, including structured and unstructured datasets. In addition to the ability to collect data from channels such as websites and mobile apps, and to connect to outside sources via APIs and other methods, marketers need ways to manage and filter data and metadata.

- **Exploration:** Marketing analytics is the discipline of finding useful patterns in data that can be applied to improve marketing and advertising. As such, analytics platforms must do more than report results — they must provide ways for users to explore data with visualization and other tools, and to manipulate it to provide better outcomes for marketing and advertising programs.

- **Advanced models:** Moving beyond data exploration, marketing analysts are increasingly employing advanced techniques. Predictive analytics and machine learning, in particular, are providing a rich selection of methods to improve personalization, next-best offer and content recommendations, ad targeting, and more. Text, image and graph analysis are improving customer insights, influencer marketing, measurement and other key tasks. While much advanced analysis is still done with specialized and open-source tools, commercial products continue to add more advanced features.

- **Extensibility:** Marketing is action-oriented, encompassing both strategic and tactical analytical requirements. Marketing analytics is expected to lead to action, and, for this reason, supporting tools must easily connect to common active channels. In practice, this support requires platforms to integrate with systems such as multichannel campaign management, email, web content management, social marketing and advertising technology. Integration may be native within a marketing hub or via connectors, but the automated connection of analytics outputs, such as segments and predictive scores with operational systems, is a rising imperative.

- **Measurement:** Determining the impact of marketing and advertising efforts has long been a goal of marketing leaders, and a wide range of multitouch attribution (MTA), and marketing mix modeling tools and services address this need. This category continues to be in transition, with the market-leading web analytics platforms investing in MTA to support a vision of full-funnel measurement; customer journey analytics promising to extend MTA techniques beyond paid media; and marketing technology players looking at acquisition (e.g., Neustar and MarketShare) and native development. Meanwhile, many tools are combining MTA (bottom-up) and marketing mix modeling (top-down) approaches in the same framework.

# Magic Quadrant

Figure 1. Magic Quadrant for Digital Marketing Analytics



Source: Gartner (October 2016)

## Vendor Strengths and Cautions

### Adobe

Adobe Marketing Cloud's Adobe Analytics platform is a Leader in this Magic Quadrant. Positioning analytics at the core of its marketing cloud, Adobe continues to add innovative features to Adobe Analytics, which traces its roots to Adobe's acquisition of the web analytics platform Omniture in 2009. Most recently, it has added workspace features that support more collaborative exploration and sharing of analyses, new data visualizations such as heat maps, and advanced customer segment evaluation that identifies key differences among segments. Supporting enterprise marketers within the context of its Adobe Marketing Cloud, Adobe continues to build a case for adoption of related features such as Adobe Target for testing and optimization; Adobe Audience Manager for data management and targeting; and Adobe Campaign for campaign management. Strong growth in core markets, including EMEA, underlines Adobe's commitment to maintaining a leading position in enterprise marketing analytics.

**Strengths**

- **Innovation and rich functionality:** Adobe's ongoing product development is informed by close observation of usage, and a deep understanding of the goals and needs of its users, from advanced data scientists to result-focused management. Users rate Adobe highly for its vision.

- **Marketing cloud integration:** Integration of Adobe Analytics with complementary tools such as Adobe Target, Adobe Media Optimizer and Adobe Audience Manager help coordinate activities that quickly turn insights into actions. Real-time anomaly detection and the ability to create, publish and share custom audience structures across tools, for example, deliver major operational efficiencies.

- **Segment analysis capabilities:** Adobe Analytics' segmentation capabilities stand out in the marketplace for their ability to combine deep sophistication with ease of use, actionability and intuitive reporting capabilities.

**Cautions**

- **Expertise recommended:** While Adobe Analytics offers a basic, entry-level tier with many automation features to support less sophisticated users and practices, more advanced organizations will get the most out of its relatively complex, high-cost solution.

- **Web analytics legacy:** The rise in significance of mobile and social interactions has spawned a wave of analytics solutions that seeks to minimize dependence on web tags, which are at the heart of Adobe's solution. Adobe's device co-op solution addresses the problem of integration and identity management, but it remains to be proven.

- **Some integrations still under construction:** Despite Adobe's strength in marketing cloud integration, product integration in some areas remains a work in progress, and reviewers noted many gaps between Adobe's vision and execution in marketing cloud product integration, particularly in areas such as data collection and real-time campaign orchestration.

## AgilOne

AgilOne is a Niche Player in this Magic Quadrant. It incorporates customer data from first-party enterprise systems and aims to provide marketers with customer analytics and cross-channel personalization opportunities to improve conversions. AgilOne standardizes customer data into a clean record that marketers use to target and personalize campaigns. The solution is particularly applicable for multichannel retail marketers, as it offers propensity-to-buy models and a predictive customer lifetime value model. Recently, AgilOne launched version 6 of its application, which offers an overhauled UI, performance and scale improvements, additional predictive analytics features, and the ability for the application to be adapted to custom business needs. AgilOne has improved its ability to ingest data from multiple sources by adding a self-service configuration option and prebuilt integrations with data append providers. The roadmap includes more predictive models, plans to build out engagement options by integrating with data management platforms (DMPs) and social channels, and enhanced data export capabilities.

### Strengths

- **Easy integration:** AgilOne integrates data from other tools and services to provide a unified customer record. As such, it has strong integrations with third-party data sources. Customers report this as a strength of AgilOne's solution.

- **Data reliability:** AgilOne's anomaly detection automates data validation, standardization and enrichment, making it more nimble and reliable than some other solutions.

- **Democratic data science:** In addition to manual segmentation capabilities, AgilOne offers self-learning segment discovery using patterns from user behavior and brand or product-specific attributes. Furthermore, marketers will find value in the product's predictive customer lifetime value models and propensity-to-buy models.

### Cautions

- **Media measurement:** Marketers wanting to drill down into the specifics of a media channel, such as a keyword or creative unit, would be challenged to do so.

- **Limited scope:** AgilOne's strategic focus on the retail vertical limits the appeal of its out-of-the-box capabilities to marketers in other industries.

- **Implementation speed and support:** Some reference customers were displeased with the time required to implement and configure AgilOne, and they expressed a desire for more support after the implementation was complete.

## AOL

AOL is a Visionary in this evaluation. Its analytics solution is positioned as a central component of its ONE offering, which provides an end-to-end stack that supports media planning, audience management, creative optimization, analytics, and programmatic buying for display, video, native and TV advertising. AOL's analytics tools were derived mainly from the company's 2014 acquisition

of leading multitouch attribution platform Convertro. In 2015, AOL was acquired by Verizon, which is in the process of expanding its cross-channel footprint in digital media. A central component of AOL's advertising technology suite, its Unified Marketing Activation Platform (UMAP), provides both multitouch attribution and marketing mix modeling results from a single user-level marketing system model, allowing it to include offline media, such as linear TV and in-store sales data as inputs. It also exports data to external systems, such as CRM, content management systems (CMSs) and ad servers. As a media-centric measurement and optimization solution, AOL will appeal to marketers with significant ad spending who want a comprehensive, media-focused tool that provides rapid results for in-flight campaign optimization. ONE's analytics tools operate within AOL's own alternative to media "walled gardens," based on its extensive user identity graph, including cross-device information from Verizon, AOL and, potentially, Yahoo, which Verizon intends to acquire by the end of 2016.

**Strengths**

- **Unified user view:** AOL's UMAP provides a cross-channel user identity graph that relies on strong matching methods such as email and first-party cookies to identify users across browsers, mobile devices and some TVs. Extensive log-in and device data from AOL, Yahoo and Verizon, among others, gives its identity graph superior scale and accuracy.

- **Speed and ease of use:** Like other media-focused analytics platforms, AOL has invested in a highly scalable and efficient infrastructure. Users cited the platform's ease of use and ease of integration as positives.

- **Performance optimization:** Cross-channel analytics deliver insight into how channels influence the purchase path, and give granular visibility into performance by device and geography, while supporting flexible yet intuitive tools for defining and testing segments and scenarios.

**Cautions**

- **Business environment:** Although Convertro offers a broad array of analytics that extend beyond advertising, AOL's identity as a digital media portfolio brand within a large telecommunications holding company provides a unique context for a general-purpose marketing analytics provider and raises questions about its long-term strategic priority to its proprietors.

- **Postlaunch support:** While pleased with the level of support received during onboarding, including data preparation and setup, reference customers gave lower marks to AOL for its postlaunch technical support teams.

- **Predictive modeling:** AOL's reference customers singled out predictive and advanced analytics as areas for improvement.

## Google

Google is a Leader in the digital marketing analytics space. With the launch of the Google Analytics 360 Suite, Google has placed analytics at the core of its suite of marketing tools that go beyond advertising, although integration with its DoubleClick suite of ad tech tools remains a key

differentiator. Although lacking some advanced features such as segment discovery and predictive modeling, Analytics 360 provides an intuitive and flexible platform with impressive visualization and collaboration capabilities. It offers a global user community, a built-in "analytics assistant" and support from professional services. Google has taken steps to address enterprise concerns, such as customer support, privacy and security. Google has focused intensively on mobile analytics and data collection, adding such reports as in-app purchases and app installs. Its roots in advertising and attribution give its analytics a distinct "conversion funnel" orientation focused on individual user journeys, which is most effective in digital commerce scenarios. Its wealth of data about individual behaviors across devices and channels puts it squarely in the "people-centric" trend of digital marketing analytics.

**Strengths**

- **Results-oriented ease of use:** Google's focus on shopping behavior and similar closed-loop analytics, supported by a variety of analytic methods that address the complexities of cross-device behavior, yields clear, action-oriented insights and transparent results. Users consistently pointed to ease of use and ease of adoption, which spans both novice and expert skill levels.

- **Ecosystem integration:** Google's wealth of data, including its cross-device identity management capabilities, is a key differentiator. For marketers invested in Google's suite of search, website and advertising campaign management tools, Google Analytics 360 integration can automate and optimize a variety of real-time processes, including remarketing and bidding strategies.

- **Reliability, extensibility and scalability:** Google Analytics users give Google's products high marks for reliability and support. Its underlying cloud infrastructure can handle large-scale activity streams in real or near-real time, and its APIs and integrations support programmatic access to features and functions.

**Cautions**

- **Speed issues:** Users express frustration with some of the latency times encountered in loading and processing data. They also express a desire for more real-time data processing and reporting capabilities.

- **E-commerce funnel focus:** Google's approach reveals its roots in media for customer acquisition and attribution based on e-commerce activities and is less in tune with marketers seeking a more CRM-oriented approach to analytics. The platform works best when it has direct access to all customer touchpoints and integrates with DoubleClick tools.

- **Missing features:** Some features, such as automated user segmentation, anomaly detection, predictive modeling and unstructured (that is, text) data analysis, are not yet available. Users also cite more support for non-Google product integrations as an area for improvement.

## IBM

IBM continues to be a Challenger in this evaluation. IBM currently takes a portfolio approach to its marketing analytics product, which offers a broad range of capabilities through tools compiled via acquisitions and some internal development. IBM has shifted its marketing analytics product architecture and naming this year. Its core offering, now branded IBM Customer Experience Analytics (formerly IBM Digital Analytics), combines Coremetrics and Tealeaf functionality under a new unified interface for web and mobile analytics, session replay (which it calls behavior analytics), and customer journey analytics. While IBM is taking steps to infuse predictive analytics across its product suite, most advanced analytics capabilities, such as network analysis, customer value segmentation, propensity modeling and next-best-offer recommendations, currently sit within the separate IBM Predictive Customer Intelligence product, based on the widely used SPSS statistical modeling package. Social Media Analytics, business intelligence (BI) and data discovery activities are supported in Watson Analytics, which IBM says will play a role in its marketing offering in the future. While not exclusive to its marketing analytics offering, IBM Universal Behavior Exchange improves integration across its own product suite and demonstrates the commitment to extensibility through a growing partner ecosystem.

**Strengths**

- **Global reach:** IBM's digital marketing analytic solutions have users in over 160 countries, delivering web analytics and predictive analytics to enterprises. IBM's sales and service organization is a particular advantage in global and emerging markets.

- **Financial viability:** IBM is seen by many organizations as a safe bet, compared with smaller players, and not biased by advertising, like other larger players.

- **Journey analytics:** IBM's early emphasis on journey analytics and its continued prioritization on the company's roadmap show prescience for the expanding role of the marketing analyst across media, marketing and loyalty efforts.

**Cautions**

- **Pricing:** Despite IBM's efforts to create a modular, accessible pricing structure that allows clients to pay for only what they need, reference clients highlight this as an area in need of improvement, pointing to unforeseen costs for additional modules, imports and exports.

- **Usability:** As noted last year, reference customers call out product user interfaces (even with a recent overhaul), tooling and data integration as pain points.

- **Ability to execute:** Current customers see promise in IBM's roadmap, particularly noting Journey Analytics, but cite frustrations with the timeline, as other players in the market outpace IBM with functional and UI updates, and sales promises fail to materialize.

## Neustar

Neustar is a Visionary in this evaluation. MarketShare, featured in last year's Magic Quadrant as an independent player, was acquired by Neustar in December 2015. The offering continues to be

centered on strategic and tactical media budget allocation, planning, and measurement, enhanced by Neustar's identity and profile management strengths. The MarketShare DecisionCloud solution is the centerpiece of Neustar's offering, which features various connected apps for media buyers and planners, as well as strategic cross-channel marketers. The solution's modules include Strategy (media planning), Action (measurement and attribution modeling), TV (cross-channel TV attribution), Benchmark (comparative performance benchmarks) and Price (pricing optimization). The applications support analysis, modeling and scenario planning for media, as well as provide inputs to tactical channel, mix and consumer-level optimizations. Neustar's PlatformOne data onboarding and cross-device graph are included in the marketing analytics solution and provide a robust customer profile for advanced segmentation and uplift modeling via ElementOne. Since its inception, MarketShare has been known for advanced, customized, enterprise-level marketing mix modeling services.

**Strengths**

- **Online-to-offline:** The combination of Neustar's authoritative identity layer and built-in onboarding capabilities with MarketShare's marketing mix modeling and attribution expertise go beyond digital to help marketers understand ROI across channels.

- **Enterprise expertise and influence:** MarketShare brings a decade of experience with large brands and is well-known by CMOs for its consultative approach and influence on budgets and media plans.

- **Customer data modeling:** Neustar brings to the offering a focus on robust customer profile and identity data that can be used for segmentation, modeling and closed-loop attribution. Profile data is enhanced by Neustar's data onboarding solution, which lets marketers match customer data from different sources.

**Cautions**

- **Cost:** With typical contracts lasting three years and averaging in the high six figures, Neustar's media analytics product is priced for larger enterprises, especially those managing large, complex media budgets.

- **Narrow focus:** Best known for MarketShare's media mix modeling pedigree, Neustar's marketing analytics capabilities still center on media planning and measurement. The vendor does not support a number of nonmedia analytics use cases, such as website and mobile app tracking.

- **Transparency:** Customers commend Neustar's (MarketShare's) robust methodology but also note that the tool could benefit from greater transparency, particularly as it relates to the impact of assumptions and constraints on forecasting.

## OptiMine Software

OptiMine Software is a Niche Player in this evaluation. It provides an integrated, cloud-based platform for measuring the impact of media investments and a set of tools to forecast alternative

scenarios and to execute some elements of digital media buying. Describing itself as an "agile measurement" solution, OptiMine provides a way for marketers to rapidly onboard, analyze and provide what-if scenarios and forecasts for both online and offline campaigns. Started eight years ago as a search engine marketing bid optimization tool, OptiMine now incorporates media data from other channels. It collects data from log files, imports and server-to-server connections, and does not use tags or cookies. OptiMine currently offers two products: Insight, which provides a view of the "true" value of channels, campaigns and tactics on a success metric, such as sales; and Impact for bid optimization and management. A third product, called Intent, is set to be released in late 2016. It will deliver detailed recommended media plans based on a marketer-defined goal, such as total budget or return on ad spend (ROAS) thresholds. While it does not support user-level analyses seen in attribution vendors, OptiMine stresses its detailed reporting, rapid ramp-up and superior data fidelity as benefits.

**Strengths**

- **Accessible trials:** While still targeting the enterprise buyer, OptiMine makes it relatively easy for a prospect to "try before you buy" via features such as the Digital Fast Ramp and its free Google data connector.

- **Intuitive interface:** OptiMine is praised by customers for its responsive dashboards and exploration tools, which allow easy drill-downs on most chart views, as well as for its cross-platform visualizations.

- **Onboarding and support:** For the second year, reference customers gave OptiMine high marks for its onboarding process, pricing and postlaunch technical support.

**Cautions**

- **Limited scope:** Essentially an automated media mix modeling and planning platform, OptiMine lacks support for nonmedia marketing use cases such as traditional web analytics.

- **Detail threshold:** Although OptiMine can deliver insight in more detail than traditional channel-level marketing mix models, it does not produce the fine-grained output of some user-level attribution tools.

- **Challenging market:** Media measurement is an increasingly competitive space. OptiMine's ability to thrive as a relatively small stand-alone player in such an environment is an open question.

## Pitney Bowes

Pitney Bowes is a Niche Player in the digital marketing analytics space. Separate from the company's core shipping business, Pitney Bowes' marketing analytics offering consists of Spectrum Miner (formerly Portrait Miner) for advanced model building. It is integrated with the company's Spectrum Technology Platform, which provides enterprise data mining and data discovery tools aimed at sophisticated users inside and outside marketing. The Pitney Bowes' marketing analytics offerings are complemented by its Portrait Suite (for inbound and outbound campaign and offer execution) and its EngageOne Communication Suite (with an add-on feature for

real-time interactive personalized video). In addition to its uplift modeling tool for multichannel campaign optimization, Spectrum Miner provides support for a wide range of analytical methods, including rule-based and automated segmentation, time series analysis, regression, decision trees, and predictive and propensity models. Like other, more traditional business intelligence platforms, Pitney Bowes' marketing analytics capabilities are primarily used on-premises by skilled analysts, although a hosted (cloud) version of Portrait Explorer is available and more accessible to business users.

**Strengths**

- **Uplift modeling:** Emerging from the University of Edinburgh, Pitney Bowes' uplift modeling capability remains a powerful way to predict performance of marketing to known customers.

- **Spectrum Technology Platform:** Spectrum is a toolset of analytic capabilities, including data quality, data governance, data integration and workflow, and data enrichment. Its developing capabilities seek to ingest multiple forms of structured and unstructured data to help marketers understand behaviors and context.

- **Advanced modeling support:** Spectrum Miner provides support for a wide range of advanced analytics functions and methods, and reference customers gave it high marks for segmentation, visualization and execution speed.

**Cautions**

- **Limited industry breadth:** Pitney Bowes' analytic offerings, although conceptually broad in use cases, are focused on telecom, insurance and finance. Within those industries, its marketing core capabilities are primarily for customer data modeling purposes.

- **Evolving development cycle:** Some of Pitney Bowes' features are still in development. Its vision to simplify offerings, user roles and use cases is still a work in progress.

- **Additional models:** A number of references mentioned that they would like to see more advanced analytics models and the ability to incorporate the marketer's own R code.

## SAS

SAS is a Leader in this Magic Quadrant. SAS offers a suite of tools to support a wide range of analytics use cases, including text analytics, optimization, statistics, forecasting, machine learning and data mining. The solution, mostly on-premises, contains products geared toward various roles within marketing analytics, from IT staff and data scientists to marketers and analysts. In addition to its core analytics solutions, SAS offers automatic updates to segmentation, anomaly detection, and unstructured data processing using text analytics and natural language processing. Its predictive analytics offering is role-specific and supports advanced and general users. SAS includes R modeling integration for data scientists. SAS score code created in any application can be reused in other SAS applications, as well as Hadoop and database systems. SAS also offers a business-user-friendly point-and-click interface with Enterprise Miner and a plug-in for Microsoft Office. It pitches its Visual Statistics product at intermediate users. This year, SAS launched Customer Intelligence

360, a digital marketing "hub" that includes a data hub, central decision engine, RESTful APIs and a marketing decision support framework to unify customer interactions. New products within it include SAS 360 Discover, a cross-channel customer analytics tool, and SAS 360 Engage, which helps marketers optimize customer interactions across digital channels. Within the next year, SAS hopes to add a data management platform (DMP) to this framework, as well as unstructured data analysis for image assets.

**Strengths**

- **Governance:** SAS is a transparent and well-governed system. Whether the role is that of a data scientist, marketing analyst or IT professional, each role can have its needs met and not worry about unhygienic data.

- **Flexibility:** SAS offers solutions that can adapt to roles. The solutions offer automated data preparation, "factory" model creation and visualization. It also allows for more manual analysis from relational databases and data warehouses, big data storage, and semistructured and unstructured data.

- **Predictive modeling:** Marketers looking for a predictive analytics solution would be well-equipped with SAS. Customers cite this as a strength of the platform.

**Cautions**

- **Complexity:** With multiple roles involved across the organization, SAS solutions require compliance across departments for implementation, maintenance and usage. Customers cite a complicated interface and poor documentation as areas for improvement.

- **Cost:** Not only is there a high cost of entry for SAS solutions evaluated in this Magic Quadrant, but the skilled resource requirement for enterprises using it can be higher than other analytics solutions.

- **Horizontal solution:** SAS is a $3.16 billion company that sells to many different industries and government agencies, as well as many lines of business. About half of its regular client end users sit within marketing. Given the company's mixed client base and relatively slow release cycles, its ability to serve fast-moving marketing analytics users in the future remains an open question.

## Visual IQ

Visual IQ is a Visionary in the marketing analytics space. A pure-play media measurement vendor, Visual IQ is a leading solution for SaaS-based marketing mix modeling, forecasting, attribution and what-if simulation. It also has capabilities in customer journey analytics enhanced by cross-device, cross-channel identification. The solution is vendor-agnostic and has preconfigured integrations with most major platforms. However, customers will need to use other tools for traditional web analytics, mobile tracking and social listening. Visual IQ's flagship product, IQ Envoy, calculates marketing performance across multiple channels. Audience IQ uses behavioral and demographic data to measure marketing impact by segment. IQ Sage supports scenario planning for media teams, while IQ Deploy uses prebuilt connectors to push media plans to trading desks, DSPs,

search engines and campaign management tools. The platform's approach uses top-down mix modeling planning with bottom-up, user-level data for day-to-day activation and optimization. In the past 12 months, Visual IQ released IQ Envoy for Branding to track effectiveness of branding media on engagement and TV Attribution to show how TV ads impact digital activity. Together, the four products of Visual IQ's suite comprise tools to support measurement, optimization and planning across a wide range of media.

**Strengths**

- **Media planning:** Recommendations are provided by setting incremental budgets by region, segment or constraints at different taxonomy levels. The top-down scenario planner generates recommendations by channel, subchannel and region. The bottom-up planner generates recommendations at placement/keyword/creative levels. Scenario plans can be created across channels or a subset, allowing both interchannel and intrachannel optimization.

- **Neutrality and reliability:** Reference customers generally say they would recommend Visual IQ, citing its publisher-agnostic approach and the trustworthiness of its attributed metrics and recommendations. Visual IQ boasts high reliability of its predictive models, and customers give it credit for providing measurable business value.

- **Service and attribution:** Visual IQ has a relatively long track record in the attribution category. Customers report that the service team is skilled and solution-oriented. Visual IQ's applications receive high marks for the ability to work with multiple media buying agencies and the ability to standardize data for attribution and analysis.

**Cautions**

- **Paid channel focus:** Visual IQ serves a subset of the digital marketing analytics space focusing on attribution and marketing mix modeling for paid media channels. Some reference customers expressed a desire to be able to analyze owned channels (e.g., website personalization) and earned channels (e.g., social shares) alongside paid media.

- **Data latency:** Visual IQ launched daily algorithmic attribution capability with refreshed model updates on a daily basis but they currently are not available hourly (most customers refresh daily). Tighter integration with predictive applications and programmatic platforms will require faster update times in the future.

- **Cost and implementation:** Some customers report that Visual IQ's cost is high relative to some competitors, and can exceed seven figures for large accounts. Implementation is complex, often requiring support from the company's professional services team.

## Webtrends

Webtrends is a Niche Player in this Magic Quadrant. The company offers its SaaS solution for more than 1,500 customers, many of whom have been using the product for a number of years. An early entrant and pioneer in the web analytics market, Webtrends continues to maintain its presence, despite strong headwinds from Google's free product and Adobe's enterprise cloud suite. With the

release of its Infinity Analytics and Infinity Data Connector modules, Webtrends is adapting its offering to meet the big data demands of enterprise organizations. These modules represent a replatforming of the product's technical architecture, with the immediate benefits of improved speed and usability. Over the next two years, Webtrends plans to integrate the workflow and user interface of its Infinity products across all its solutions. It also plans to roll out Infinity Optimize, its next-generation segmentation, targeting and automated optimization product, as well as Journey Mapping, which aims to unify customer data across devices and the path to conversion. Finally, Webtrends anticipates the Internet of Things, as its Infinity data architecture is designed to handle the large volume of unstructured data that devices and sensors generate.

**Strengths**

- **Data storage:** The technical backbone behind its Infinity Big Data Platform is Hadoop, which supports the storage of massive amounts of both structured and unstructured data. This gives enterprises the opportunity to nest marketing analytics data within their existing data science capabilities.

- **Processing:** Webtrends performs near-real-time processing across all of its data and reports by default that can be immediately provided to third-party applications. The Webtrends API is cited as a strength by customers.

- **Integrations:** Webtrends has a number of options for prebuilt integrations, as well as the Infinity Data Connector module to integrate its data with outside platforms. Customers report that Webtrends offers satisfactory support around data collection, preparation and processing.

**Cautions**

- **User interfaces:** Webtrends Infinity promises usability improvements, but some reference customers report that out-of-the-box interfaces are difficult to use for ad hoc queries, requiring training and thus greater time to value than comparable tools.

- **Transition requirements:** Although the Infinity platform is backward-compatible with the marketers' existing Webtrends tags, the full potential of the new infrastructure as well as future modules, such as Infinity Optimize, require a new tag redeployment.

- **Advanced analytics:** While Webtrends has invested a great deal in updating its data infrastructure, it still only meets expectations compared with the advanced analytics capabilities of its competitors. Furthermore, reference customers remain ambivalent about these offerings.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

## Added

No vendors were added to this Magic Quadrant.

## Dropped

**comScore** was dropped from this Magic Quadrant because its relevant digital marketing analytics assets were acquired by Adobe. comScore no longer offers a stand-alone end-to-end digital marketing analytics product, although it does provide products and services related to its media data and measurement offering.

## Vendors to Watch

Several vendors demonstrated many of the qualities we associate with digital marketing analytics, but they didn't meet all of the inclusion criteria we established (see the Inclusion and Exclusion Criteria section below). However, given the volatility of the marketplace, they are worth watching as the market evolves.

### Eulerian Technologies

Eulerian Technologies is a web analytics, tag management and data management platform focused on performance marketers with significant advertising requirements. Built on its own technology stack, Eulerian provides a number of analytical tools useful for media measurement and optimization, including rule-based attribution reports; marketing frequency reports, which quantify the number of touchpoints prior to a sale; and path analyses, which identify common paths to purchase. Designed to work alongside first-party data systems, Eulerian can ingest data from CRM and tag management systems, as well as other marketing and ad tech platforms via APIs. It provides prebuilt and customizable dashboards while offering some drill-down capabilities as well as connectors to BI tools such as Tableau and QlikView. While limited in its advanced analytics and providing no onboard predictive analytics, Eulerian has built a data management, segmentation and rules execution engine designed to support high-volume campaigns, particularly for e-commerce marketers.

### SAP

Building on the foundation of Hybris, the e-commerce platform it acquired three years ago, SAP has been developing and rolling out the SAP Hybris Marketing solution. This solution intends to provide end-to-end support for digital marketers from acquisition to conversion and loyalty. Core to SAP's vision is a set of analytics products and services, including segmentation, visualization and ad hoc exploration, and predictive product recommendations. They are built on top of a customer data management platform providing a master marketing record. SAP has incorporated a real-time complex event processing engine providing personalization and trigger-based messaging on the fly, based on an analysis of actions such as website or email engagement. Unlike other enterprise systems providers, SAP has shown an interest in supporting advertising, and it announced partnerships with a number of advertising and social marketing platforms including Sprinklr and Turn.

### Splunk

The Splunk Platform currently complements existing marketing analytics tools by allowing marketing analysts to visualize and explore data from different sources within a single interface. Splunk supports digital marketing, product analytics and customer experience analytics. It is particularly useful for advanced analysts and data scientists who wish to perform custom analysis on marketing information in real time. For example, Splunk can collect any time-series machine data. Data sources such as clickstreams and mobile, along with application and network performance data, can be ingested by the Splunk Platform. Connectivity with relational sources enable enrichment of clickstream and mobile data with data from outside databases, without the need to move or upload data. It also connects to big data stores such as Hadoop, and supports flexible ad hoc query, native visualizations and dashboards. Splunk provides web analytics metrics in real time, as well as customer product analytics, including product adoption, feature use, customer behavior, purchases and churn. For more advanced analytics, the Splunk Platform provides predictive, clustering and forecasting capabilities.

### Thunderhead

Thunderhead positions its One Engagement Hub (One) as a real-time engagement optimization platform, a key component of which is customer journey analytics. One is a SaaS platform and represents an evolution of Thunderhead's successful communication-customization solution. For marketing analysts, One offers a tool to integrate and analyze first- and second-party data from systems such as CRM, web analytics and email. First-party data is integrated using a common customer key or identifier, and a taxonomy of characteristics is associated with that identifier, building out a broader portrait of each customer. In addition, a separate taxonomy of interaction events is defined and collected from any relevant device or touchpoint, along with time stamps. Combining identifiers and events, One is able to analyze and categorize a user-level marketing journey. Analytics and visualization allow the marketer to build a better understanding of common paths to purchase, events and user characteristics that drive transitions through the journey, and to use such insights to increase customer engagement and value.

## Inclusion and Exclusion Criteria

Providers needed to meet the following criteria to be included in this Magic Quadrant:

### Revenue and New Customers

Providers in this evaluation must have had global revenue of at least $15 million or 1,000 installations in 2015, with at least 20% of installed base being users with at least two years' tenure. In addition, providers must have acquired at least 10 new customers of their analytics product(s) in 2015. Competition among providers in this segment is high, and the ability to acquire new customers and grow is a signal of strength.

## Marketing Focus

The intended audience for this Magic Quadrant includes marketing leaders, marketing analysts and technologists within the marketing function. Therefore, we require demonstrated, significant adoption by marketing practitioners. In addition, our audience includes business-to-business-focused and business-to-consumer-focused users, and so providers should have relevance to, and adoption by, both types.

## Software as a Service

Providers' digital marketing analytics product(s) must be available as a software-as-a-service (SaaS) deployment, although on-premises versions may also be supported. Professional services may be available, but the majority of revenue should derive from software products.

## Basic Capabilities

Providers in this evaluation should support application capabilities in all of the following domains:

- **Extensibility —** Supports analytics across multiple platforms, including web and mobile, multiple channels, and multiple data formats. For example, providers that support only social analytics or only text analytics do not qualify.

- **Data collection and onboarding —** Supports the marketers' collection of data for analysis from channels, such as websites, email systems and mobile apps, through tags, onboarding, feeds or other methods.

- **Data access —** Enables users to access other common marketing data sources through custom integrations and/or published APIs.

- **Visualization and exploration —** Provides prebuilt and customizable dashboards and data visualization tools for marketers, as well as the ability to perform ad hoc data exploration.

- **Filtering and manipulation —** Allows analysts to prepare data such that it becomes available for subsequent analysis, including the ability to filter, apply custom mappings and preprocessing rules, and define metadata.

- **Batch and real-time processing —** Recognizing that marketing analysts must support near-real-time business needs, providers should enable some near-real-time capabilities in addition to traditional batch data processing.

- **Management and deployment —** Facilitates data, metadata and model management, integration and deployment to other applications; includes defining user roles and permissions for workflow.

- **Usability and interface —** Has intuitive user experience design, including integration of different platform components.

## Advanced Analytic Capabilities

In addition to the above basic capabilities, providers in this evaluation should have native support for at least three of the following advanced analytic capabilities:

- **Segmentation —** Including rule-based segmentation and automated segment discovery (clustering).

- **Prediction —** Applying predictive models to provide product and content recommendations, propensity models, and scoring.

- **Anomaly detection —** Using automated statistical methods to identify and analyze the components of events or metrics that are outside an expected range of values.

- **Unstructured data analysis —** Applying analytical methods to unstructured data, such as text and images, including sentiment analysis, other text analytics and image classification.

- **Customer journey analytics —** Understanding how individuals and segments interact across channels over time, using approaches such as pathing analysis, game theory and Markov chains.

- **Media measurement —** Estimating the impact of marketing and advertising efforts using multitouch algorithmic attribution and/or top-down marketing mix modeling.

# Evaluation Criteria

## Ability to Execute

We elected to weight Ability to Execute toward existing product features and the reported experience of reference customers. As part of a rapidly changing category, digital marketing analytics providers will be rewarded for product and service excellence, more than the ability to sell and market that so often spells success in a more mature or commoditized market.

Table 1. Ability to Execute Evaluation Criteria

| Evaluation Criteria | Weighting |
|---|---|
| Product or Service | High |
| Overall Viability | Medium |
| Sales Execution/Pricing | Not rated |
| Market Responsiveness/Record | Not rated |
| Marketing Execution | Not rated |
| Customer Experience | Medium |
| Operations | Low |

Source: Gartner (October 2016)

## Completeness of Vision

We elected to weight Completeness of Vision largely toward the vendor's market understanding, particularly how such understanding is expressed in terms of product innovation and strategy. While factors such as business model and vertical go-to-market tactics are important, we believe category volatility, rapidly shifting user requirements and advances in underlying technologies mean that providers will survive and thrive based largely on the clarity of their vision.

Table 2. Completeness of Vision Evaluation Criteria

| Evaluation Criteria | Weighting |
|---|---|
| Market Understanding | High |
| Marketing Strategy | High |
| Sales Strategy | Not rated |
| Offering (Product) Strategy | Medium |
| Business Model | Not rated |
| Vertical/Industry Strategy | Not rated |
| Innovation | Medium |
| Geographic Strategy | Not rated |

Source: Gartner (October 2016)

## Quadrant Descriptions

### Leaders

The Leaders quadrant continues to be occupied by Adobe, SAS and Google. All have shown an ability to innovate ahead of the market, adding capabilities through internal investment and strategic acquisitions. Although they continue to evolve in directions required by marketing customers, none of the Leaders yet offers a complete package for the digital marketing analyst or business user. However, they are each pursuing a vision of a converged analytics offering that supports cross-channel and cross-device identity graphs, marketing channel engagement analytics, and paid media measurement. In addition, they are all adding features requested by more advanced users, who represent a growing proportion of customers. All three can position analytics at the core of a digital marketing hub, with the ability to extend data and insights into multichannel campaign execution and workflows. New channels and techniques will no doubt emerge that challenge the Leaders' ability to stay current. Likewise, their increasing scope makes demands on marketing leaders' budgets and teams, which could make the Leaders vulnerable to cheaper and simpler (if less complete) point solutions, as well as analytics embedded within more operational systems such as multichannel campaign management and marketing automation platforms.

### Challengers

The Challengers quadrant includes only one vendor: IBM. The paucity of Challengers speaks to the fragmented nature of the ecosystem, which has a large number of point solutions that are fighting to grow and define a path forward in a market dominated by a handful of large companies. As a Challenger, IBM has assembled (largely through strategic acquisitions) a set of respected analytics tools that give it a breadth of capabilities greater than most of the vendors in this Magic Quadrant. However, while IBM claims a vision around its customer journey analytics framework, from session replay to high-level campaign analysis, it continues to ask customers and prospects to look forward to future releases that have a tendency toward delays. Such message-versus-reality confusion makes it a particularly difficult vendor to assess. However, there is little doubt that IBM's scale and resources make it a credible threat to Leaders in the future. In particular, its artificial intelligence capabilities, exemplified by its Watson platform, could offer marketers a compelling range of decision support and automated insight services that competitors would envy.

### Visionaries

The Visionaries quadrant is occupied by AOL, Visual IQ and Neustar. They share a vision centered on the accurate measurement and optimization of paid media within the context of a larger marketing investment. Lacking the breadth of capabilities found in the Leaders and the Challenger, the Visionaries, in part, make up for gaps in their capabilities with a clear-eyed focus on an important subset of marketing requirements: answering the question of how to accurately (and in detail) determine the impact of media and marketing efforts. They provide proven utility and combine SaaS with strong professional services. In addition, they have built out a particularly robust data storage and processing infrastructure due to the requirements of the media marketplace, which operates at big data scale. As forward-looking vendors, Visionaries are particularly attractive to innovative acquirers, as both AOL and Neustar (which acquired MarketShare in 2015)

demonstrate. Further product reconfigurations and ownership shuffles are possible. AOL and Neustar's analytics offerings may also be affected by shifts in their parent companies' strategic agendas.

### Niche Players

The providers in the Niche Players quadrant come from a variety of backgrounds, and many are leaders in their respective areas. These players face the common challenge of migrating their offerings and brand images toward a broader scope in a shifting marketplace. In the current Magic Quadrant, the Niche providers are AgilOne, OptiMine Software, Pitney Bowes and Webtrends. Each has undoubted strengths in particular analytics areas, but as a group, they lack the broad scope of the Challenger and the integrated vision of the Leaders and Visionaries. All are themselves attempting to grow significantly, providing only a piece of the marketing analysts' requirements, yet they have either not articulated or not yet demonstrated to the market how they can migrate their product toward market-leading growth. Given market volatility and potential acquisition activity, any of the Niche Players could credibly move to the Challengers or Visionaries quadrant next year. In addition, Magic Quadrant capabilities and related weights are re-evaluated each year to reflect changes in market priorities, and this can affect the relative scoring of any vendor.

# Context

The past several years have brought a dramatic acceleration in the application of technology and real-time data to marketing. At the same time, the growth of programmatic platforms has increased the complexity and data volume associated with media. As more money flows into digital channels and the underlying delivery technology improves, analytics teams and tools are being asked to track, measure, optimize, personalize and improve a wide variety of channels, devices, campaigns, formats and experiments. Marketing leaders have stepped up with higher analytics budgets and a commitment to hiring teams and retaining experts.

## Market Convergence

Digital marketing analytics solutions emerged two decades ago when the first web analytics platforms were launched to analyze server logs. While web analytics continues to function as a mature market, the broader digital marketing analytics ecosystem is undergoing rapid and significant change. This second Magic Quadrant for digital marketing analytics continues to be motivated by four ongoing transformative developments:

- **Channel convergence:** Consumers have an abundance of channels and devices with which to interact with brands and purchase products and services. Marketers must understand and analyze customer journeys that cross multiple channels and devices, as experience becomes the new battleground for competitive differentiation.

- **More advanced requirements:** Improving customer experience and the impact of marketing and advertising increasingly require the application of advanced analytical techniques that were previously reserved for custom projects. Predictive analytics, network graph analysis, machine

learning and other techniques are being adopted rapidly by marketing teams. Improved artificial intelligence (AI) and related methods such as image processing hold great promise for smarter decision support and more flexible query tools.

- **Better media measurement:** Rising complexity and greater investment have led marketing leaders to demand more rigor in measuring the impact of tactics, and better return on investment. To meet these demands, digital marketers turn to sophisticated media and marketing attribution and modeling tools, which use various approaches to improve measurement accuracy and make optimization recommendations.

- **Usability imperative:** As the demands on internal analytics teams grow, marketers are asking vendors to provide new features more rapidly and improve the usability of their user interface, setup and maintenance. Better usability increases efficiency and makes the tools more relevant to a wider group of users who may have nontraditional analytics backgrounds. To this end, leading platforms are investing in easier natural-language queries and developing virtual assistants to aid analysts.

## The Need for Integration

Improvements in data processing speeds, big data storage and frameworks, and active and well-funded research all have created an environment in which it is possible to combine insights across channels. Multichannel and full-funnel analytics at the user level was always desired but impossible. It becomes more possible each year. At the same time, consumers expect an integrated experience across channels and devices and are less tolerant of irrelevant marketing. Both demand and supply forces drive marketers to seek a single view of the customer, holistic analytics and insights, and techniques advanced enough to make a difference. For these reasons, we continue to believe that vendors in the space will have to provide more integrated solutions. These solutions ideally will transcend recent point categories — up to, and including, the combination of customer analytics with media measurement and operational systems, such as comprehensive marketing hubs.

## Category Volatility

This report reflects information collected in the second and third quarters of 2016. Marketers should consider this snapshot a baseline, but also weigh more recent and ongoing developments, as they research solutions. They should also be wary of vendor promises regarding future features or release dates — in this category, particularly, many vendors overpromise or are overoptimistic. Always ask what is currently in production, what is in beta and what is not. Meanwhile, demand explicit assurances regarding data ownership and reuse (including benchmarking), and privacy and security policies.

# Market Overview

The market for digital marketing analytics continues to thrive. It is characterized by consolidation in mature categories, such as web analytics, and ongoing fragmentation in others, such as mobile app and social analytics. Gartner's 2015 data-driven marketing survey found that analytics' share of marketing budgets rose more than 50% between 2013 and 2015. More recent signs point to slower

growth, but analytics' role in marketing remains critical. Sixty-two percent of marketers said they expect to beef up their analytics team this year and next, and two-thirds planned to have a center of excellence in place by 2017.

Demands on marketing analytics software and service providers are significant. Requirements are becoming more advanced and encompass both owned marketing channels, such as websites and email, and a variety of paid media channels. Among marketing leaders surveyed by Gartner, 68% said that web analytics was "essential" to their marketing efforts, 61% said the same of media analytics and 43% said advanced predictive methods were essential (see "How Leaders Manage Data-Driven Marketing"). Providers are rising to the challenge, rolling out new features and providing support for greater scale and speed, real-time streaming data processing, and more rapid queries.

In the traditional web analytics — now called digital analytics — category, a handful of vendors led by Adobe and Google dominate enterprise and midmarket users. The free Google Analytics product is nearly ubiquitous, and the launch of Google Analytics 360 Suite and expanded professional services signals Google's intention to provide a full-funnel marketing and advertising measurement and personalization solution, and gain more share of the enterprise marketing analytics budget. Meanwhile, mainstays of those same enterprises such as Adobe and SAS continue to compete successfully on advanced features, integration with related systems and support. In addition to such horizontal tools, a number of platforms are building scale serving specific markets, particularly retail.

A large number of point solutions exist for specific advanced analytics use cases, most notably lead scoring for business to business marketers; machine learning for propensity models and recommendations, primarily for digital commerce and media users; and testing and personalization platforms for websites and mobile apps. These were too narrowly scoped for inclusion. Media measurement — including MTA, marketing mix modeling and combined solutions — encompasses large platforms such as AOL's, and many relatively small stand-alone product and service providers. Also, many operational systems such as email, social marketing, content management and digital asset management platforms embed basic dashboards and some analytics capabilities.

We segment the competitive landscape of vendors who qualified for this Magic Quadrant into three broad categories: diversified software providers, media measurement providers and customer analytics providers.

## Diversified Software Providers

These include Adobe, Google, IBM, SAS and Webtrends. With the exception of SAS, they emerged from the website analytics space. These companies have added new capabilities as the market evolved. While Webtrends remains a stand-alone offering, the other providers embed digital analytics within a larger stack that includes related technologies, such as campaign management or search marketing platforms. These related technologies can receive output such as segment assignments from analytical systems, as well as provide input to these systems for reporting and analysis. In addition to targeting the enterprise, providers in this category are investing more heavily in serving the advanced or power user, improving decision support and upgrading user experience. They have all added — or will soon add — predictive capabilities to their tools. Some have begun experimenting with natural language queries, digital "assistant" avatars and nascent artificial

intelligence. Their challenge remains in adding features fast enough to serve the market while integrating these within already complex and costly product sets. Both SAS and parts of IBM's suite face the additional challenge of broadening their user base beyond a core of skilled users and providing tools that can meet the growing imperative to democratize data science in the marketing organization.

## Media Measurement Providers

These include AOL, Neustar, Visual IQ and OptiMine Software. These companies focus on providing marketers and advertisers with ways to measure the true impact of their efforts and improve their return on investment. They are typically employed by marketers with significant media spend who want to measure and improve the impact of their paid programs, such as display, video, mobile and search advertising, as well as marketing tactics such as email. They generally combine measurement approaches, including user-level multitouch attribution and aggregate-level marketing mix models, and their implementation, interpretation and maintenance can be difficult for less technical marketers. Their cost, complexity and focus on advertising make them most attractive to large enterprise business-to-consumer advertisers, which limits their reach in the broader market. However, their high penetration within the enterprise base, focus on service delivery models, and expertise with high data volumes and advanced modeling techniques qualify them to pursue a broader role closer to the core of digital marketing analytics.

## Customer Analytics Providers

These include AgilOne and Pitney Bowes. These companies focus on providing a single view of the customer based on first-party sources. They differentiate themselves by stressing data quality and hygiene, as well as accurate metadata, and their maintenance of a master customer record that captures key attributes, which in turn forms the basis of the analytics engine. These are practical solutions designed to improve the performance of specific marketing campaigns. Their utility makes them attractive to performance- and retention-focused marketers, and their emphasis on customer data maintenance aligns them with the "user-centric" movement of most marketers. They have the potential to expand their offerings with a focus on predictive analytics for a wider set of users, and advanced measurement and data exploration. Gartner inquiry volume indicates that many marketers have an interest in improving so-called customer journey analytics, which, today, is more prevalent within customer relationship marketing (CRM) and customer service functions. We expect the application of user-level time-series analysis to first-party customer data to become a marketing analytics mainstay in the future.

Finally, digital marketing analytics continues to attract attention from marketing hub vendors such as Oracle, Salesforce, Experian and Nielsen, who do not offer stand-alone analytics platforms that meet our Magic Quadrant requirements but continue to expand the analytics embedded in their product and service suite. As integrated marketing hubs and ecosystems evolve, they will offer more comprehensive marketing analytics support. In addition, a significant number of BI and advanced analytics vendors see marketing as a logical source of new users. A few such platforms — such as Tableau, GoodData and Qlik Sense — are already widely used by marketing teams for specific requirements, such as visualization or data exploration. These platforms lack some capabilities required for inclusion in this Magic Quadrant, but they are positioned to develop or

acquire what is needed to make them credible competitors for more of the marketing analytics budget.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Data-Driven Marketing Techniques Fuel Investments in Talent and Centers of Excellence"

"How Leaders Manage Data-Driven Marketing"

"Presentation of Key Recommendations From Gartner's Data-Driven Marketing Survey, 2015"

"Magic Quadrant for Digital Marketing Hubs"

"Critical Capabilities for Digital Marketing Hubs"

"Market Guide for Mobile Marketing Analytics"

"Market Guide for Social Analytics"

"How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

### Evaluation Criteria Definitions

#### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

## Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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