

# Vendor Landscape: Digital Intelligence Technology Providers You Should Care About

Landscape: The Digital Intelligence Playbook

by James McCormick

February 17, 2017

## Why Read This Report

Digital intelligence practitioners use data and analytics to delight customers with optimal experiences wherever they digitally interact with their firms. The exploding volumes and variety of digital interactions have resulted in a confusing array of technologies available to build a complete digital intelligence architecture. This report helps customer insights (CI) pros make sense of the digital intelligence vendor landscape with seven different digital intelligence tech categories to help guide decision makers on the combination of technology vendors they need to partner with.

## Key Takeaways

### **Digital Intelligence Technology Is At The Heart Of The Insights-Driven Business**

Digital intelligence technology is core to the transformation of enterprises into insights-driven businesses. These firms gain true competitive advantage by leveraging data and insights at scale to enhance customer experience and business decision making.

### **Firms Must Partner With Multiple Digital Intelligence Technology Vendors**

No one technology vendor can deliver all the capabilities needed for a complete digital intelligence architecture. Decision makers must choose the right combination of third-party vendor technologies for their specific digital intelligence needs.

### **Seven Different Digital Intelligence Technology Categories Exist Today**

Forrester analyzed 15 digital intelligence capabilities, which we grouped into three technology tiers. By analyzing these tiers in combination, we identified seven digital intelligence technology vendor categories.

# Vendor Landscape: Digital Intelligence Technology Providers You Should Care About

## Landscape: The Digital Intelligence Playbook



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February 17, 2017

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Forrester conducted a digital intelligence survey with and/or interviewed 121 vendor companies, including Adobe, Brandwatch, Clarabridge, Crimson Hexagon, Drawbridge, Google, IBM, Merkle, New Relic, Oracle, Pitney Bowes, SAP, and SAS.

## Related Research Documents

[The Insights-Driven Business](#)

[TechRadar™: Digital Intelligence, Q2 2016](#)

[Transform Customer Experience With Continuous Optimization](#)

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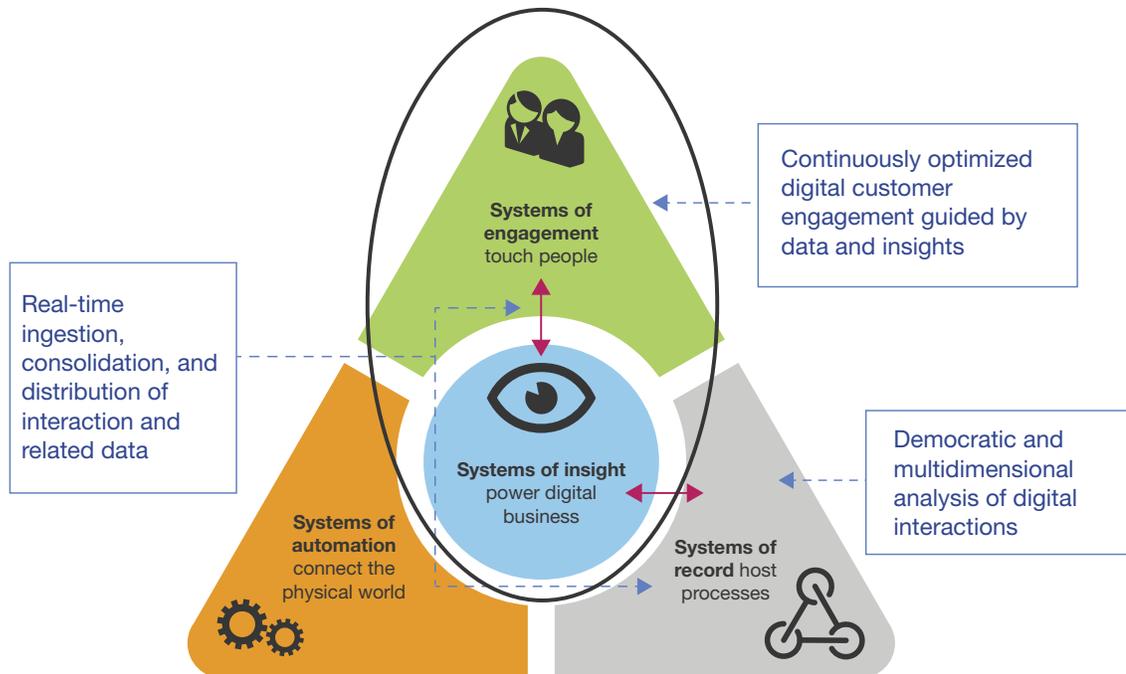
## Digital Intelligence Tech Joins Insights To Digital Engagement

Digital intelligence (DI) is the practice of capturing, managing, and analyzing customer data and insights to deliver a holistic view of customers' digital interactions for the purpose of continuously optimizing business decisions and customer experiences across the customer life cycle.<sup>1</sup> Firms achieve true competitive differentiation when they apply DI at scale — and at every opportunity within moments of digital customer engagement.<sup>2</sup> Without DI technology, CI pros would simply not be able to link systems of insight with system of engagement.<sup>3</sup> This technology is at the heart of firms' ability to keep up and intelligently engage with customers through the (see Figure 1):

- › **Real-time ingestion, consolidation, and distribution of interaction and related data.** A baseline requirement for any DI practice is the capacity to manage large volumes of interaction data from a broad range of digital sources and process it with customer data at the velocity of customer engagement. Modern digital customer data management technologies can instrument digital touchpoints for data collection, ingest other data (e.g., CRM, transaction, and sales), and meld it all to deliver an up-to-date customer profile — all at a pace that keeps up with rapid customer interactions.<sup>4</sup>
- › **Democratic and multidimensional analysis of digital interactions.** To completely understand customers during their interactive moments, firms must constantly assess the perceived value that customers — and brands — receive during moments of engagement as well as the experiences and expectations that influence these perceptions.<sup>5</sup> DI technologies can provide many different digital analytics techniques needed to understand all parts of interaction equation then deliver the analysis in a form that non-experts and systems of engagement can understand and act upon.
- › **Continuous optimization of digital customer engagement guided by data and insights.** Using up-to-the-moment customer insights, DI processes continually inform business decisions and actions that deliver experiences that best balance customer and business needs during moments of digital engagement.<sup>6</sup> DI technologies achieve this by linking the systems of engagement — technology interfaces such as websites and mobile apps — with digital analytics and data systems using techniques such as online testing and machine learning.

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**FIGURE 1** Digital Intelligence Technologies Link Systems Of Insights And Systems Of Engagement**But Piecemeal Approaches Are Ineffective And Costly**

To deliver true competitive advantage, firms must apply insights-driven strategies like DI at scale and at every opportunity.<sup>7</sup> Often, however, firms make isolated decisions about acquiring and integrating DI technology.<sup>8</sup> The lack of a coordinating strategy means that DI technology assets are sporadically distributed and isolated in teams across the enterprise within functions such as marketing, eCommerce, digital, and analytics. This piecemeal approach delivers an ineffective investment in DI technology because:

- › **Redundancy runs rife as different teams purchase similar tech.** Most large enterprises that Forrester briefs have multiple digital technologies from different vendors that serve overlapping or duplicative functionality. For example, 90% of enterprises use multiple web analytics tools.<sup>9</sup> Not only does this multiply software costs and provide differing if not conflicting views of customer interactions; it also vastly increases the human capital needed to deploy, run, and analyze these different tools.
- › **ROI is restricted because tech and skills are unevenly distributed.** In such fragmented approaches, parts of the enterprise (such as marketing) can have significant assets for tracking and optimizing customer engagement, while other parts (such as customer support, which could easily benefit from these techniques) have no investment at all. Holistic tech approaches allow,

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for example, enterprises to extend the use of A/B testing technologies from marketing, where it may be used for midfunnel conversions, to customer support, where it may be used to enhance the support portal and reduce call center calls. Wider availability can help reduce costs as well as increase revenues.

- › **Misaligned tech inhibits holistic customer understanding.** When firms make DI tech decisions in isolation, they put little thought into whether technologies owned by different teams should work together. Typically, a marketing team may purchase a behavioral targeting platform to personalize offers on the home page but then neglect to take advantage of its capabilities for sharing segments with the web analytics platform owned by the product management team. Multiple customer segmentation tactics — and therefore multiple versions of customer understanding — can occur not only across teams but within the same team as well.

## Understand Tech Vendors To Build Your Digital Intelligence Strategy

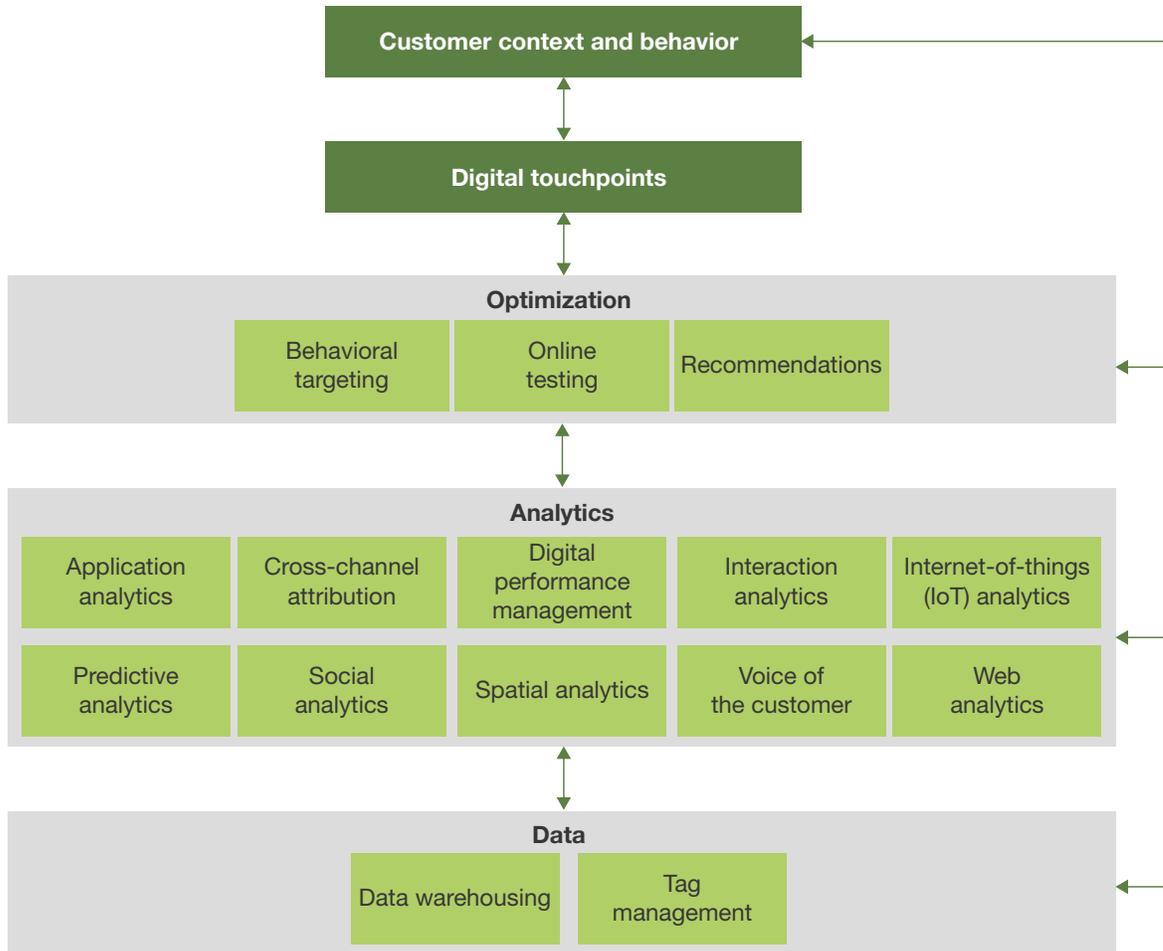
Firms must build their DI technology stack using an overarching strategy as a guide, both to avoid the pitfalls of a piecemeal approach and to deliver the competitive benefits of deploying DI at enterprise scale. Our survey of 117 vendors shows that no one vendor can support all the requirements of a DI practice. Firms must not only choose multiple technology partners to work with; they must choose the right combination of vendors to ensure compatibility and reduce redundancy. To help firms select the best tech partners for their strategy, Forrester has built a DI technology classification based on:

- › **Grouping 15 different DI capabilities into three functional tiers.** Forrester has identified 15 commonly used technologies inside the DI architecture (see Figure 2).<sup>10</sup> We categorize each technology into one of three functional tiers: digital engagement optimization, digital analytics, and digital data management (see Figure 3, see Figure 4, and see Figure 5).
- › **Assessing vendor capabilities within each functional tier.** We surveyed 117 vendors on the functionality each provided for the different technologies.<sup>11</sup> Vendors reported the level of their technology's functionality as either none (no technical capabilities), partial (incomplete technical capabilities), basic (complete but basic technical capabilities), or advanced (complete and advanced technical capabilities). While some technical capabilities were more common, not one vendor provided advanced capabilities for all technologies (see Figure 6).
- › **Classifying vendors by the functional tiers each serves with advanced functionality.** We then segmented the vendors into one of seven DI classes based on the DI technology tiers within which the vendors offered advanced capabilities (see Figure 7).

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**FIGURE 2** The Digital Intelligence Architecture And The Three Categories Of Technology



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**FIGURE 3** Digital Intelligence Technologies That Support Digital Engagement Optimization

Technology	Technology definition	Usage scenarios
Behavioral targeting	Behavioral targeting tools allow users to deliver tailored content, promotions, and functionality to visitors using rules or predictive algorithms based on visitor behavior, characteristics, and historical interactions.	Behavioral targeting technologies simplify the content discovery process for consumers. This technology appropriately identifies key traits about the visitor and categorizes that visitor based on predefined rules. Ultimately, visitors experience personalized sites, enjoy the benefit of reduced noise from irrelevant information, and see only content that meets their needs. Marketers can also use this technology to target promotions. It allows organizations to align promotions with predicted consumer needs based on browsing history and site interactions. This has the dual benefit of increasing customer satisfaction while also yielding higher conversion rates. As interaction history is cumulative, this data informs future offer relevance for the individual customer and also fuels product recommendations for consumers within the same segment.
Online testing	Online testing technologies allow organizations to create, deploy, measure, and manage A/B, multivariate, and other statistical experimentation types that compare multiple versions of an experience to identify how they perform against each other and a control group. The objective of these techniques is to statistically determine the best treatment option for a given digital customer interaction.	Online testing technologies are used to objectively inform marketers which of an available array of experiences are optimal for page designs, multistep processes (e.g., checkout and booking), landing pages, onsite promotions and/or offers, and general usability of the site. Marketers can also use online testing technologies to optimize email marketing, media buying, and segmentation. By tracking and monitoring the effect of test variants against business KPIs, online testing can boost business outcomes such as customer experience, revenue, and average cost of sale. Today, most testing is undertaken in websites, but marketers can apply testing to other digital touchpoints such as mobile apps and offsite/third-party locations.

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**FIGURE 3** Digital Intelligence Technologies That Support Digital Engagement Optimization (Cont.)

Technology	Technology definition	Usage scenarios
Recommendations	<p>Recommendation engines serve digital visitors, such as those to websites and mobile applications, with suggestions for related content based on rules and algorithms. Recommendations are traditionally associated with eCommerce merchandising — showing visitors complementary or similar products with the goal of encouraging cross-sell conversions. However, recommendations are commonly applied in other industries such as media and financial services and in other applications such as site search.</p>	<p>Recommendation engines are used to connect people to products, services, information, or other people based on user profile, preferences, past online activity (such as product purchases), and product/service availability. A typical usage scenario is when an online retailer recommends targeted product offers at checkout based on what a customer is about to buy or has bought in the past. Another includes those by internet media providers (e.g., Amazon Prime and Netflix) that suggest movies or videos based on what you have watched or are about to watch.</p>

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**FIGURE 4** Digital Intelligence Technologies That Support Digital Analytics

Technology	Technology definition	Usage scenarios
Application analytics	Application analytics technologies track and analyze visitor behavior on applications. Due to the popularity of iOS and Android smartphones, applications are commonly associated with the mobile channel. But increasingly, applications are spreading across a wide variety of hardware, including tablets, televisions, kiosks, and even refrigerators.	The use cases for application analytics are extensive and quickly evolving. They have some similarities to web analytics in that customer interactions and trends (such as screen taps, functions used, pages viewed, and responses to in-app messaging) are measured and analyzed. However, application analytics use cases also include capturing the daily active users (DAU) and the monthly active users (MAU) to track the DAU/MAU trend over time; measuring and analyzing the length of time users interact with the application; and measuring the number of app downloads and/or app users' retention rates. These use cases help firms understand the success of their mobile application. More specialist use cases include measuring against KPIs that provide a clearer indication of business success such as user lifetime value and/or average revenue per user.
Cross-channel attribution	Cross-channel attribution tools provide measurement techniques to calculate the partial value of each interactive channel in influencing a desired outcome, such as a conversion.	Cross-channel attribution technologies help marketers understand how an actual channel, campaign, or marketing tactic performs, guiding them to spend more marketing budget on tactics that are working — and divesting tactics that are failing. Cross-channel attribution tools measure the relative impact of each potential interaction a brand has with a customer, and they assign the appropriate value to each marketing interaction that leads to a desired customer action. Attribution technologies measure and compare the contribution to influencing the desired customer action across individual tactics or a combination of tactics, thereby providing cross-channel insights — such as how a remarketing email influences onsite product reviews.
Digital performance management	Digital performance management tools track the availability and responsiveness of applications and their support infrastructure (e.g., servers, network, content delivery networks, and third-party services) and the impact on customer experience and key performance indicators (KPIs), providing alerts and incident management in addition to analytics and reporting.	Customer insights (CI) professionals can use digital performance management platforms to monitor the performance that an application is delivering to real users. CI pros can then correlate performance metrics, such as page download times, to business and behavioral metrics, such as abandonment or conversions. This technology is also used to continually monitor the performance of sites using scripted robots that regularly interact with the site, detecting and/or preempting issues even when there are no users interacting with the site.

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**FIGURE 4** Digital Intelligence Technologies That Support Digital Analytics (Cont.)

Technology	Technology definition	Usage scenarios
Interaction analytics	Interaction analysis tools provide session replay functionality (i.e., the ability to visually track visitor interactions with content and functionality). Because of the detail individual interaction analysis data collects, these tools also provide aggregated thematic maps and displays — often called heat maps — of how users are interacting with pages.	The main use cases for interaction analysis tools include identifying and troubleshooting onsite errors, investigating areas on the site where customer experience can be improved, reducing the friction and abandonment of forms, finding out which content is most influential and where to place it, and watching video-style replays of real user journeys to understand in detail why digital visitors are behaving in a certain way
Internet-of-things (IoT) analytics	IoT analytics for digital intelligence analyzes and generates customer-related insights from large volumes of data collected from sensors embedded within devices such as fridges, smartphones, and motor vehicles that customers interact with. Technology to ingest and analyze data from industrial components has been around for decades and is not covered in this research.	Use cases tend to center on mobile devices. Emerging use cases include delivering insights needed to drive smart products and services. Examples include providing insights that enable customers to find and schedule a ride from a connected car service (e.g., car2go and Zipcar) or providing customers with visibility into the status of orders and deliveries.

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**FIGURE 4** Digital Intelligence Technologies That Support Digital Analytics (Cont.)

Technology	Technology definition	Usage scenarios
Predictive analytics	Predictive analytics technologies for digital intelligence use data to find models — models that can anticipate outcomes with a significant probability of accuracy. These technologies either 1) focus on leveraging data mining techniques to develop predictive models to estimate the future behavior of customers and adopt a forward-looking perspective or 2) leverage prebuilt predictive models within marketing and optimization solutions for automatic decisioning.	Predictive analytics technologies use algorithms to find patterns in data that might predict outcomes in the future — which can then be used to build a predictive model. For example, a predictive model may indicate that there is an 81% chance that a customer will leave you for a competitor. So predictive technologies define models that express the probability of an outcome. Many digital marketing, eCommerce, and customer insights professionals use solutions driven by predictive models to predict what ad an online shopper will respond to, what offer to place in front of a customer, or when to send an email campaign to different customer segments.
Social analytics	Social analytics tools and tech provide insights about spikes in volume or analysis on the sentiment of what consumers are saying and how this relates to how they are actually behaving.	Social analytics is used to help marketing and PR teams track mentions of their brands, products, and employees and to see how the public feels about them to detect events or potential crises. Legal teams use the technology to analyze online discussions for potential copyright infringement, legal threats, product knockoffs, and other regulated needs. Other use cases include comparing the extent, scope, and context of mentions relative to competitor brands as well as researching market and consumer trends.
Spatial analytics	Spatial analytics tools and technologies collect customer location information for the purpose of analyzing for spatial insights such as distance, proximity, best route, best location, driving behavior, and so on.	Spatial analytics technologies are used to deliver contextual insights about customers across the entire life cycle as they shop, entertain, commute, work, or play. Typical use cases include tracking mobiles (and therefore customers) around stores, branches, outlets, etc. For instance, this can help retailers understand customers as they walk past and through their stores and calculate the percentage who are enticed into the store and how many purchase an item. Spatial analytics tech is also used to provide an understanding of customer movements within stores or branches to help optimize store layout, react when queue lengths are too long, or predict product interests and affinities using customer dwell times.

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**FIGURE 4** Digital Intelligence Technologies That Support Digital Analytics (Cont.)

Technology	Technology definition	Usage scenarios
Voice of the customer	Online voice-of-the-customer (VOC) for digital intelligence technologies allow online visitors to provide direct feedback to onsite questions and surveys posed by organizations. VOC analytics provides qualitative insights that provide additional context to other digital quantitative analysis techniques, such as those for web and interaction analytics. Other analytics technologies for channels including social, blog, reviews, media, and mobile analytics tools are excluded from this definition for the purpose of this research. Social analytics are discussed in a separate category.	VOC analytics technologies enable companies to collect the scores, comments, or requests from online VOC forms so that firms can analyze and act upon the insights generated. These technologies can also link customer opinions with customers by integrating VOC data with web analytics or session replay data.
Web analytics	Web analytics platforms track the behavior of website visitors to help organizations understand how activity unfolds on websites as well as to help them understand traffic sources, track campaign effectiveness, and evaluate the customer experience.	Modern web analytics technologies have come a long way in the last five years. The most important use cases now include calculating, managing, and reporting on visitor segmentation; marketing attribution; integrating visitor data with other data sets (e.g., email, mobile, and offline customer data sets); path analysis; determining the value of online content; and guiding online test initiatives such as A/B and multivariate testing.

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**FIGURE 5** Digital Intelligence Technologies That Support Digital Data Management

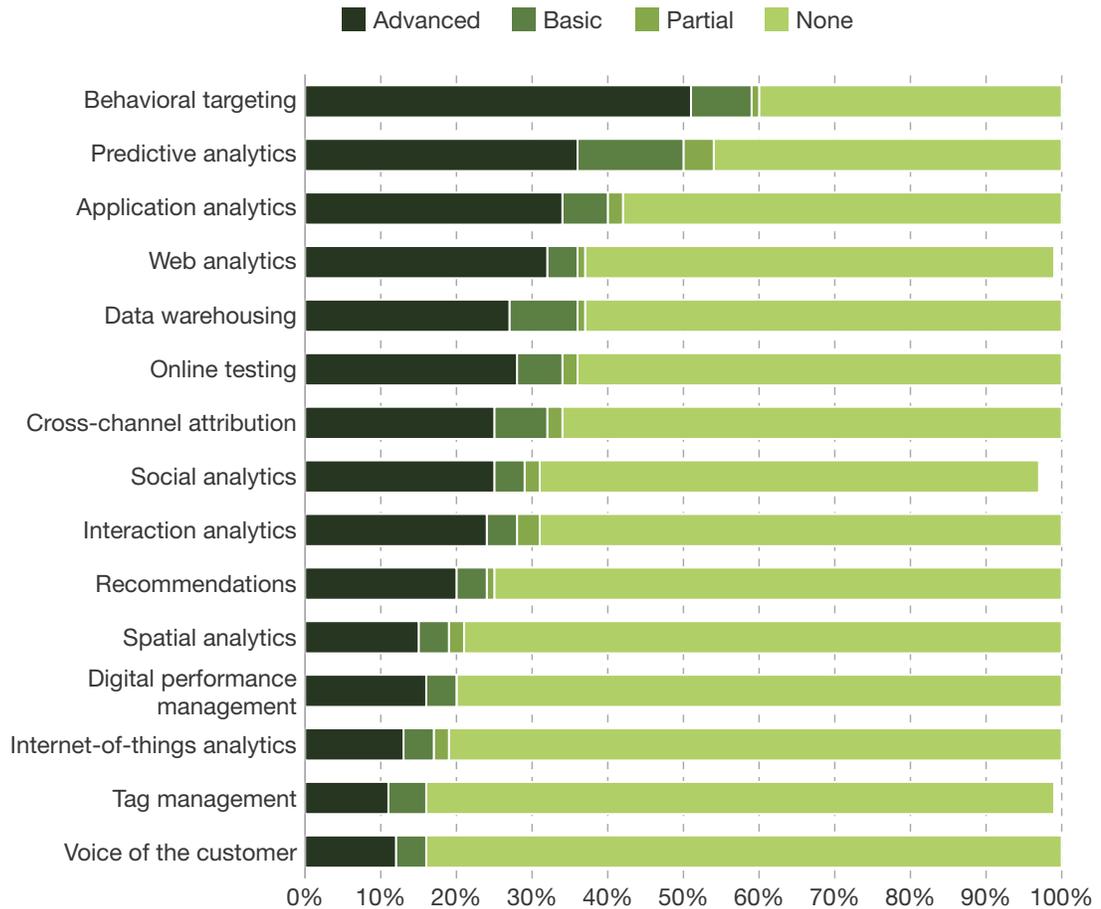
<b>Technology</b>	<b>Technology definition</b>	<b>Usage scenarios</b>
Data warehousing	A data warehouse for digital intelligence is a system that stores processed digital interaction and business data for availability to digital intelligence applications.	Within the context of digital intelligence, data warehousing technologies are used to bring data together within a common/standard digital customer data model and also to manage digital customer data profiles.
Tag management	A tag management system (TMS) ensures the efficacy of marketing and analytics efforts by consolidating individual tag execution and maintenance into a single master tag management interface. The prevalence of JavaScript and other executables as the deployment methods of choice for many digital marketing and analytics tools makes effective tag management a priority for organizations.	The usage scenarios vary by maturity stage of TMS adoption. The first stage of adoption starts when the technology is used to deploy and manage tag-based digital technology at scale across multiple digital properties (e.g., websites and mobile apps). The next phase starts when the TMS is used to manage and standardize the collection and distribution of digital visitor data to multiple third-party analytics and marketing technologies. The third stage starts when the technology is used to manage and control third-party customer engagement and marketing technologies. The final stage starts when tag management is used to optimize marketing campaigns and customer interactions by activating tags based on user behavior and context.

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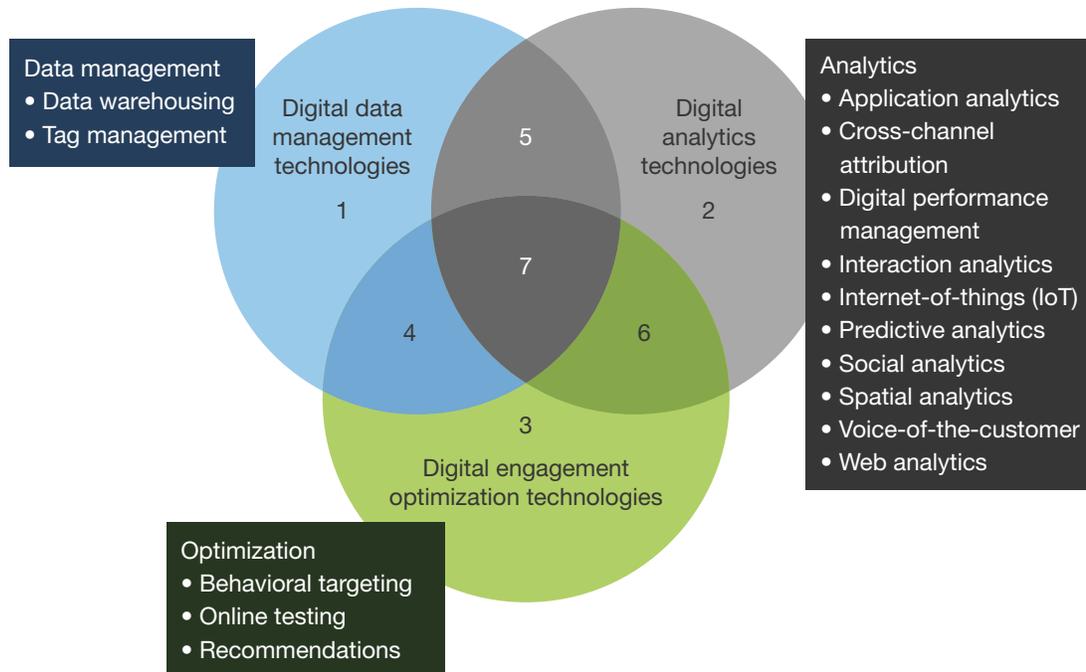
**FIGURE 6** The Extent And Level Of Functionality Differ Extensively Across The Vendor Landscape

**Level of functionality offered across vendors**



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**FIGURE 7** The Seven Digital Intelligence Vendor Categories Showing Areas Of Functional Competence**Use Digital Intelligence Categories To Help Guide Vendor Selection**

Using the results from our survey, we placed each vendor within each of seven DI market categories (see Figure 8):

- › **Category 1 vendors manage and share digital customer data.** Vendors such as Celebrus, Ensignten, and Tealium offer technologies that persist and/or manage digital customer data from multiple digital and offline sources. With their data warehousing and/or tag management capabilities, the solutions can integrate with multiple other digital analytics and optimization technologies. Doing so allows them to share holistic views of customer interactions across multiple channels and functions. The buyers and direct users of these products are digital analytics teams and a mix of business, operational, and technical teams from those within the CMO and CIO remits. As is typical of many other DI technologies, the biggest investors in digital data management technologies are retailers; financial services firms; and media, entertainment, and leisure organizations.
- › **Category 2 vendors focus on digital analytics technologies.** These vendors offer digital analytics technology either as a lead product or as a product baked into capabilities outside of the DI practice, such as that for multichannel customer experience, marketing, or product optimization. Many vendors fall into this category, including those offering application management, interaction

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management, digital performance management, or social analytics such as Appsee, Clicktale, Dynatrace, and Sprinklr. The three biggest verticals investing in these technologies — making up 50% of overall spenders in this market — are retail; financial services; and media, entertainment, and leisure. In terms of business models, there is a fairly even distribution between B2C and B2B firms. Typical buyers within the organization are those using the CMO's budget or those from focused digital analytics and CI teams.

- › **Category 3 vendors are optimization specialists.** All vendors in this group offer some level of behavioral targeting, with most (71%) offering advanced capabilities. Vendors such as Selligent and Unbounce also offer advanced online testing functionality. Some, such as Accengage and SiteSpect, provide specific functionality for optimizing messages or content that is commonly applied to use cases beyond marketing, such as digital product or customer support optimization. The biggest users of this technology are retailers, consumer packaged goods (CPG), and financial services firms. Within the enterprise, the CMO, eCommerce, and dedicated digital optimization teams are the ones spending the most on this category. While B2C represent the biggest set of use cases that these vendors support, firms also apply these optimization techniques to many B2B engagement scenarios.
- › **Category 4 vendors track and optimize digital customer interactions.** These vendors measure and track engagements within specific digital channels or parts of the customer life cycle for the purpose of delivering value to the business and the customer. Vendors like MobileRQ focus on mobile app measurement, while firms such as Relay42 use their data management platform technology to measure and track responses to digital advertising. The likes of Monetate focus on measuring eCommerce interactions. All of these vendors analyze interactions to inform, optimize, or personalize customer engagements using techniques such as targeting (behavioral targeting, recommendations) and testing (such as A/B/n testing or multivariate testing). Direct-to-consumer teams such as digital business and eCommerce functions within transportation, financial services, and retail firms are the biggest buyers of this type of technology.
- › **Category 5 vendors link data management to specific digital analytics.** Vendors in this category all claim to offer advanced digital data warehousing capabilities. For most, their purpose is to warehouse and manage data for specific analytics purposes, such as application, cross-channel, or web analytics. Vendors such as Rakuten Marketing (formerly DC Storm) and TagCommander possess advanced tag management technology that facilitates data collection and integration on websites during moments of engagement. Others, such as Chartbeat, specialize in providing visualization and reporting of web and/or mobile app visitor behaviors. Unlike for many of the categories, customers use a fairly even mix of budgets from many teams, including that of the chief digital officer (CDO), CMO, CIO, digital analytics lead, and eCommerce lead. The biggest users of this technology by market vertical are media, entertainment, and leisure (making up a fifth of all buyers), followed closely by retailers.

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**› Category 6 vendors provide advanced digital analytics and optimization technology.**

Two types of vendors dominate this category: 1) those that offer mobile-focused optimization capabilities for advertising and apps, such as Abakus, Localytics, and Urban Airship; and 2) those that lead with optimization capabilities that are applied across multiple channels and use cases, such as Amplero, OpenText (Optimost), and Optimizely. Most of the firms offer behavioral targeting, while just over half offer some form of online testing. Less than a quarter of firms in this category offer an advanced recommendations capability; these include Cxense, NGDATA, and SAS. Typical buyers of these technologies are CMOs and vertically aligned roles such as CDO and customer analytics from the retail, media, entertainment, and leisure sectors.

- › Category 7 vendors offer technologies across the entire DI stack.** Vendors in this category have typically built out multilayered DI offerings starting from one of two positions: Either they started from a digital data and/or analytics perspective and then built out capabilities that could support the optimization of number of engagement types across the customer life cycle (as did SAP Hybris and Webtrends), or they started by delivering specific types of optimization, such as those for customer experience, ad delivery, and marketing, and then developed more advanced digital data and analytics capabilities through acquisition, product development, or both (as did Adobe, BlueConic, and Google). A large majority of these vendors have advanced data warehousing technology and include some form of behavioral targeting. Typically, they also offer web and app analytics as well as cross-channel attribution analytics.

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**FIGURE 8** Vendors' Technologies Deliver Functionality Across Different Combinations Of The Three Tiers

Vendor category	Vendors in category	Digital intelligence tech categories for which the vendors' products deliver advanced functionality and which the vendors build and own themselves:				
		Digital data management	Digital analytics	Digital engagement optimization		
7	Adobe AdTheorent BlueConic Cooladata Evergage Google IBM	Leanplum MapR Technologies Marketing Evolution Nielsen (Nielsen Marketing Cloud, formerly eXelate) SAP Hybris	Sitecore Swrve Webtrends	Yes	Yes	Yes
6	AB Tasty Abakus Amplero Applied Predictive Technologies (APT) Apptimize Certona CleverTap comScore Custora Cxense Drawbridge FollowAnalytics Get Smart Content Hi Conversion Kahuna	Localytics Mixpanel NGDATA OnyxBeacon OpenText (HP) Optimost Optimizely Oracle (Maxymiser) Pitney Bowes Placed PlaceIQ Resonate Salesforce SAS Splunk Squirro	Thinknear (Telenav) Urban Airship Visual IQ Walkbase Webtrekk (Divolution) Wingify (Visual Web Optimizer) Woopra Zaius Zoomph	No	Yes	Yes
5	Apsalar Awarepoint Chartbeat	Rakuten Marketing (formerly DC Storm) Janrain Keen IO	ListenFirst Media New Relic Tag-Commander	Yes	Yes	No
4	MobileRQ Monetate Relay42			Yes	No	Yes

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**FIGURE 8** Vendors’ Technologies Deliver Functionality Across Different Combinations Of The Three Tiers (Cont.)

Vendor category	Vendors in category			Digital intelligence tech categories for which the vendors’ products deliver advanced functionality and which the vendors build and own themselves:		
				No	Yes	No
3	Accengage Baynote Convert Insights Mosis	Selligent SiteSpect SmarterHQ Unbounce		No	No	Yes
2	Answers (ForeSee) AppDynamics Appsee AT Internet Audiense BMC Software Brandwatch Clarabridge Clicktale Crimson Hexagon Decibel Insight Digimind Ditto Labs Dynatrace	Franz Ghostery ListenFirst Media Lucky Orange Mouseflow NetBase Solutions Networked Insights Neustar (MarketShare) Observepoint OpinionLab Piwik PRIME Research Pulsar	SessionCam SOASTA Splunk Sprinklr Synthesio Talkwalker ThinkVine Union Metrics Unmetric UserReplay	No	Yes	No
1	Celebrus Enlighten HexagonAB	Tealium		Yes	No	No

## Competing Demands Challenge And Diversify Vendor Approaches

While category 7 vendors provide strong capabilities within all three of the DI tiers, no one technology vendor — or even a specific constellation of vendors — is able to service all the needs of all mature enterprisewide DI practices (see Figure 9). When selecting vendors to partner with, CI pros must consider the balance of competing vendor strength and DI practice demands:

- › **Functional specialists versus broader platform capabilities.** Large vendors such as Adobe, Google, and IBM have built up and/or acquired conglomerations of technologies with capabilities across all three tiers of the DI architecture. Specialist vendors such as AppDynamics, Celebrus, and Enlighten have technologies that provide horizontal capabilities emphasizing interoperability with third-party technologies. Other specialists, like Baynote, Mosis, and OpinionLab, offer out-of-the-box solutions that directly solve specific marketing or business problems.

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› **Tightly integrated first-party capabilities — architected for third-party tech integration.**

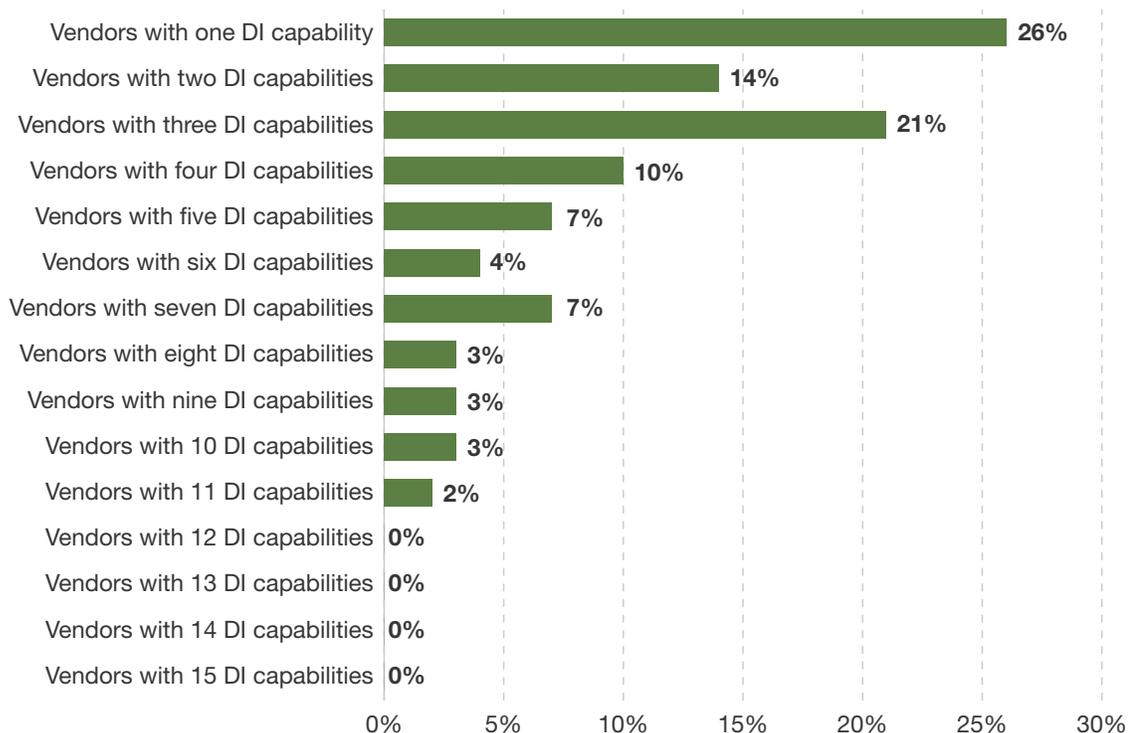
Firms need to balance opposing forces: They want to minimize the number of vendor technologies they manage, by selecting vendors that offer multiple capabilities in a tightly integrated platform. But — because no one DI technology vendor does it all — they need to bring in multiple third-party technologies that can easily integrate with one another to complete their DI technology stack.

- › **Limited use-case applicability or relevance across the customer life cycle.** Many DI tech vendors have built platforms biased toward solving particular problem areas where there is immediate need and ROI (for example, Google focuses on marketing, Localytics on mobile, and Sitecore on content). As insights-driven business approaches mature, CI pros are reaching out to vendors such as CoolaData, Mixpanel, and SAS that service larger portions of the enterprise, many different digital touchpoints, and many different use cases. These vendors support the optimization of customer interactions across a broader swath of the customer life cycle.

**FIGURE 9** No Vendor Is Able To Directly Deliver Advanced Capabilities For All 15 Digital Intelligence Technologies

**Proportion of vendors by number of digital intelligence (DI) tech capabilities**

(Proportion of vendors)



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**What It Means**

## DI Landscape Complexities Preoccupy Execs And External Partners

Currently, CI pros must integrate multiple vendors' technologies to complete a DI technology stack that can service all the needs of an insights-driven firm. This requirement for a tech solution jigsaw puzzle is a symptom of a transitional period in which customers' digital interactions are constantly shifting, enterprises are digitally transforming, and vendors are constantly evolving their products and services. At least until 2020, new and existing stakeholders across the entire DI ecosystem will continue to come under pressure to be nimble and innovative, as:

- › **Tech vendors will race to complete the DI stack but will fail.** The underlying disruptions of the digital transition period we are in mean that, for the foreseeable future, vendors will continue to scramble to fill in the gaps in their technology products' digital data, digital analytics, and digital engagement optimization capabilities. They will invest in developing and acquiring technology — but as soon as one hole is filled, two others will open up elsewhere, keeping a complete stack out of reach.
- › **Executives will take more interest in DI technology decision making.** DI is core to an enterprise's transformation toward being insights driven. Business execs must now ensure that they invest time and resources to building out a clear strategy and road map for DI. The good news is that execs are starting to show signs of elevating the priority of, and investment in, strategic insights initiatives such as DI.<sup>12</sup> Forrester's research shows that enterprises are now investing in chief data officers and enterprisewide customer data management projects, and they are actively driving business transformation with customer insights.
- › **The demand for DI services will continue to grow.** Over half of firms want to manage key DI functions such as web analytics and online testing without the help of external services partners.<sup>13</sup> However, firms simply don't have the resources to do it themselves. The urgency to generate and leverage digital customer insights is increasing in line with the complexity of digital customer engagement. More firms are now seeking external help. Many services vendors such as Accenture, Capgemini, and Cognizant are continuing to grow their businesses in response to the demand for implementation, managed, and strategic services for DI.

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## Supplemental Material

### Survey Methodology

Forrester's Q3 2016 Global Digital Intelligence Vendor Landscape Online Survey was fielded in July and August 2016. This online survey included 117 respondents globally. Digital intelligence was defined to respondents as the practice that seeks to optimize customer digital interactions at every opportunity using customer data and analytics. Forrester surveyed digital intelligence technology vendors about their business and product capabilities for each of the 15 different technology categories (i.e., application analytics, behavioral targeting, cross-channel attribution, data warehousing, digital performance management, interaction analytics, internet-of-things analytics, online testing, predictive analytics, recommendations, social analytics, spatial analytics, tag management, voice of the customer, and web analytics). This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where vendors are today and where the industry is headed.

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**Companies Surveyed Or Briefed For This Report**

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

AB Tasty	Clicktale
Abakus	Cloudera
Accengage	Cognizant
Accenture	comScore
Adobe	Convert Insights
AdTheorent	CoolaData
Amplero	Crimson Hexagon
Answers Corporation (ForeSee)	Custora
AppDynamics	Cxense
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Appsee	Deloitte Touche Tohmatsu
Apptimize	Digimind
Apsalar	Ditto Labs
AT Internet	Drawbridge
Audiense	Dynatrace
Awarepoint	Enlighten
Baynote	Evergage
BlueConic	FollowAnalytics
BMC Software	Franz
Brandwatch	Get Smart Content
Celebrus	Ghostery
Certona	Google
Chartbeat	Hexagon AB
Clarabridge	HiConversion
CleverTap	IBM

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Insightpool	Optimizely
Janrain	Oracle (Maxymiser)
Kahuna	Pitney Bowes
Keen IO	Piwik
Leanplum	Placed
ListenFirst Media	PlacelQ
Localytics	PRIME Research
Lucky Orange	Pulsar
MapR Technologies	Rakuten Marketing (formerly DC Storm)
Marketing Evolution	Relay42
Merkle	Resonate
Mixpanel	Salesforce
Moasis	SAP
MobileRQ	SAS
Monetate	Selligent
Mouseflow	SessionCam
NetBase Solutions	Sitecore
Networked Insights	SiteSpect
Neustar (MarketShare)	SmarterHQ
New Relic	SOASTA
NGDATA	Splunk
Nielsen (Nielsen Marketing Cloud, formerly eXelate)	Sprinklr
ObservePoint	Squirro
Olapic	Swrve
OnyxBeacon	Synthesio
OpenText	TagCommander
OpinionLab	Talkwalker
	Tealium

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Telenav (Thinknear)	Walkbase
ThinkVine	Webtrekk (Divolution)
Unbounce	Webtrends
Union Metrics	Wingify
Unmetric	Woopra
Urban Airship	Zaius
UserReplay	Zoomph
Visual IQ	

## Endnotes

- <sup>1</sup> Forrester has formalized the definition of digital intelligence in the vision report of the digital intelligence playbook. We define it as the capture, management, and analysis of data to provide a holistic view of the digital customer experience that drives customer engagement optimization and the execution of marketing tactics and business strategies. See the Forrester report “[Optimize Customer Experiences With Digital Intelligence.](#)”
- <sup>2</sup> Forrester defines insights-driven businesses as those that harness and apply data and analytics at every opportunity to differentiate its products and customer experiences. Firms that are good at doing this will leapfrog their competitors that don’t and together will generate roughly \$1.2 trillion in revenue by 2020. See the Forrester report “[The Insights-Driven Business.](#)”
- <sup>3</sup> Enterprises have systems that engage customers. Systems generate insights from data and those that then automate both to scale and keep up with the level of intelligent decision making needed for modern digital customer engagement. See the Forrester report “[Transform Customer Experiences With Systems Of Insight.](#)”
- <sup>4</sup> CRM: customer relationship management.
- <sup>5</sup> See the Forrester report “[Your Digital Intelligence Strategy Must Match The Speed Of Your Customers.](#)”
- <sup>6</sup> Forrester defines this approach of constantly informing — with data and analytics — the best possible decision and action during moments of digital customer interaction as continuous optimization. See the Forrester report “[Transform Customer Experience With Continuous Optimization.](#)”
- <sup>7</sup> Digital intelligence can and does deliver competitive advantage if applied at scale at every opportunity. See the Forrester report “[Transform Customer Experience With Continuous Optimization.](#)”
- <sup>8</sup> For core digital intelligence optimization practices, such as online testing, 68% of technology decisions are made by individual contributors or departmental managers; 30% are made by functional leads such as the CMO or VPs of marketing and ecommerce; and only 2% are made by the senior-most decision makers in the company that own the corporate strategy. See the Forrester report “[Optimize Customer Experiences With Online Testing And Continuous Optimization.](#)”
- <sup>9</sup> Nine out of 10 firms use multiple web analytics tools according to Forrester’s Q1 2014 Global Web Analytics Forrester Wave™ Customer Online Survey. See the Forrester report “[Gauging Web Analytics Practices In The Age Of The Customer.](#)”
- <sup>10</sup> In previous research, Forrester has identified and assessed 15 digital intelligence technologies relative to the business value each provides and the technology life-cycle stage each currently exists within. See the Forrester report “[TechRadar™: Digital Intelligence, Q2 2016.](#)”

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<sup>11</sup> Source: Forrester's Q3 2016 Global Digital Intelligence Vendor Landscape Online Survey.

<sup>12</sup> See the Forrester report "[Predictions 2017: Artificial Intelligence Will Drive The Insights Revolution.](#)"

<sup>13</sup> See the Forrester report "[Gauging Web Analytics Practices In The Age Of The Customer.](#)"

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