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Now Tech: Digital Intelligence Technologies, Q2 2019

Forrester's Overview Of 42 Digital Intelligence Technology Providers

by James McCormick
May 22, 2019

Why Read This Report

You can use digital intelligence technology to centralize your view of customer engagement data, understand engagement, and automate continuous improvement processes. But to access these benefits, you'll first have to select from a diverse set of vendors that vary by size, functionality, geography, and vertical market focus. Customer insights (CI) professionals should use Forrester's Now Tech report to understand the value they can expect from a digital intelligence technology provider and select vendors based on size and functionality.

Key Takeaways

Transform Customer Engagements With Digital Intelligence
Vendors offer an array of modern and sophisticated data, analytics, and experience optimization solutions to enterprises wishing to keep up with complex multifunctional and omnichannel digital intelligence requirements.

Select Vendors Based On Size And Functionality
We identified four functional segments, each with varying capabilities: 1) engagement data hubs; 2) digital analytics; 3) experience optimization; and 4) digital intelligence platforms.

Do Your Homework Before Making Further Technology Investments
Be ready to take full advantage of your next digital intelligence technology investment and 1) create a strategy to guide your road map; 2) procure technologies that work well with current and future investments; and 3) assess the current state of your practice to identify gaps and reduce redundancies.

FOR CUSTOMER INSIGHTS PROFESSIONALS

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Transform Customer Engagements With Digital Intelligence

Brands are rapidly evolving and transforming customer digital engagements beyond browsers to include apps, kiosks, connected devices, and environments such as stores and branches. They have also moved beyond marketing campaigns to include product, service, and customer support. In parallel, their desire to intelligently enhance these engagements using data, analytics, experimentation, and targeting techniques has increased. To keep up with these increasingly complex, digitally intelligent requirements, vendors are building new and more sophisticated data, analytics, and experience optimization technology products. Forrester calls this growing enterprise investment opportunity digital intelligence (DI), which we define as:

> *Technologies that capture, manage, analyze, and act on digital interaction data and leverage these capabilities to optimize business decisions, actions, and customer experiences at enterprise scale.*

Insights-driven firms are massively disruptive. Everything they do is driven by a strategic and enterprise-level approach to data, analytics, and insights, and they are gaining significant market share as a result.[1] As these firms have shown, CI pros whose firms strategically invest in digital intelligence technology can expect to:

› **Centralize their view of data for digital customer engagement.** DI data tech breaks down digital customer interaction data silos within marketing, business, and product applications. Vendors build products able to create single and omnichannel views of digital interactions for teams as well as engagement tech to synchronize at scale and at the required speed.

› **Understand engagement with a comprehensive set of digital analytics techniques.** The growth in digital engagement analytics methods is increasing opportunities to understand customer interactions. Vendor offerings reflect this diversity by merging a combination of analysis techniques, such as for web, app, the internet of things, and social media.

› **Automate continuous improvement processes.** With data, analytics, experimentation, and AI methods, DI processes deliver optimized decisioning, actions, and experiences that help you win, grow, and retain customers and revenue. Vendor DI products automate these processes at scales that make a competitive difference.

Select Vendors Based On Size And Functionality

We've based our analysis of the digital intelligence market on two factors: market presence and functionality.

Digital Intelligence Market Presence Segments

We segmented the vendors in this market into three categories, based on digital intelligence revenue: large established players (more than $50 million in annual digital intelligence revenue); midsize players ($16 million to $50 million in revenue); and smaller players (less than $16 million in revenue) (see Figure 1). We did not include vendors that we estimated to have less than $5 million in annual category revenue.

FIGURE 1 Now Tech Market Presence Segments: Digital Intelligence Technologies, Q2 2019

NOW TECH

Digital Intelligence Technologies

Q2 2019

LARGE >$50M in annual category revenue

Adobe
Google
IBM
Mixpanel
Optimizely
Oracle
Sitecore
Snowflake*
Tealium
Teradata
Verint ForeSee

MIDSIZE $16M to $50M in annual category revenue

AT Internet
Certona*
Clicktale
Cxense
Ensighten
Evergage
Heap
Leanplum
Localytics
Monetate
NGDATA
RichRelevance
SAS
Signal
SiteSpect
Webtrekk*

SMALL <$16M in annual category revenue

AB Tasty*
ActionIQ*
Appsee
Boxever
Celebrus
CleverTap
Decibel
Dynamic Yield*
FullStory*
GoodData*
HiConversion
Relay42*
Userlytics*
UserReplay
Wingify*

*Forrester estimate

Digital Intelligence Technology Functionality Segments

To explore functionality at a deeper level, we broke the digital intelligence technology market into four segments, each with varying capabilities and levels of maturity (see Figure 2 and see Figure 3):

- **Engagement data hubs.** These solutions collect, process, model, and distribute data collected during digital customer engagements. They do this at the speed and scale needed to keep up with customer engagement and support the entire enterprise. Mature practices use these solutions as integration hubs that feed multiple data, analytics, and engagement technologies to understand and enhance digital customer experiences. This category is evolving from vendors that offer other solutions, such as customer data platforms, data management platforms, data warehouses, or tag management systems.

- **Digital analytics.** These solutions analyze the behaviors, context, performance, and outcomes of digital engagements. They do this within and across an increasing number of digital touchpoint types (e.g., browsers, apps, and connected devices).[2] Mature practices use them to analyze traffic sources, track campaign effectiveness, segment and predict engagements, and evaluate the customer experience. In support, vendors are developing capabilities for recording, analyzing, and reporting on digital conversions and journeys; for detailed visitor interactions; and for application and campaign performance.

- **Experience optimization.** These solutions leverage digital analytics, experimentation, and AI to automatically and dynamically evolve and deliver optimized customer experiences — within and across an increasing number of touchpoint types (e.g., browsers, apps, and connected devices).[3] Mature DI practices use these technologies and continuous learning processes to automatically deliver the best experience to the right customer at the right moment. This segment's vendors are enhancing and merging online testing, behavioral targeting, and recommendation capabilities using machine learning/AI techniques.

- **Digital intelligence platforms.** These solutions merge some of the advanced functionality found within the other three market segments within an integrated offering.[4] They have capabilities for persisting, modeling, and analyzing engagement data — as well as for optimizing decisions, actions, and experiences — across multiple digital touchpoint types. Vendors in this segment are usually either large incumbents that have built, acquired, and then sought to merge multiple components of the DI stack or smaller vendors specializing in applying DI within a marketing, mobile, or product delivery context.

FIGURE 2 Now Tech Functionality Segments: Digital Intelligence Technologies, Q2 2019, Part 1

	Engagement data hub	Digital analytics
Ingestion and management of customer engagement data sources	High	Moderate
Real-time digital data processing and availability for use	High	Low
Open data accessibility to multiple digital intelligence (DI) technologies	High	Low
Engagement data profile management	High	Moderate
Identity resolution	High	Low
Syndication of industry/competitive insights and trends	None	High
Digital engagement metrics and analytics supporting multiple channels	Low	High
Customer journey analytics	Moderate	High
Digital marketing measurement and analytics	Low	Moderate
Digital engagement/marketing reporting and alerting	Low	High
Online testing	None	Low
AI-based experimentation/experience optimization	Low	Low
Rules- and algorithmic-based behavioral targeting	None	Low
Product/content recommendations	None	Low
Breadth of DI capabilities, including data, analytics, and optimization	None	Low

Segment functionality ■■■ None ■■■ Low ■■■ Moderate ■■■ High

FIGURE 3 Now Tech Functionality Segments: Digital Intelligence Technologies, Q2 2019, Part 2

	Experience optimization	Digital intelligence platform
Ingestion and management of customer engagement data sources	Moderate	Low
Real-time digital data processing and availability for use	Low	Low
Open data accessibility to multiple digital intelligence (DI) technologies	Low	Moderate
Engagement data profile management	Low	Moderate
Identity resolution	Low	Low
Syndication of industry/competitive insights and trends	Low	Moderate
Digital engagement metrics and analytics supporting multiple channels	Moderate	High
Customer journey analytics	Moderate	High
Digital marketing measurement and analytics	Low	Moderate
Digital engagement/marketing reporting and alerting	Low	High
Online testing	High	Moderate
AI-based experimentation/experience optimization	High	Moderate
Rules- and algorithmic-based behavioral targeting	High	Moderate
Product/content recommendations	High	Moderate
Breadth of DI capabilities, including data, analytics, and optimization	Low	High

Segment functionality None Low Moderate High

Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, and vertical market focus (see Figure 4, see Figure 5, and see Figure 6).

FIGURE 4 Now Tech Large Vendors: Digital Intelligence Technologies, Q2 2019

LARGE >$50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
Adobe	Digital intelligence platform	NA 60%; LATAM 1%; EMEA 30%; AP 9%	Media; retail; financial services	Home Depot; NVIDIA; RBS
Google	Digital intelligence platform	NA 40%; LATAM 10%; EMEA 30%; AP 20%*	Retail; travel*	Vendor did not disclose
IBM	Digital analytics	NA 50%; LATAM 10%; EMEA 35%; AP 5%*	Retail; financial services; media, entertainment, and leisure	Vendor did not disclose
Mixpanel	Digital intelligence platform	NA 59%; rest of world 41%	Technology; media and entertainment; financial services and insurance	Expedia; Microsoft; Samsung; Starz; U.S. Bank
Optimizely	Experience optimization	NA 70%; EMEA 27%; AP 3%	Retail; media; B2B	Alaska Airlines; Crate & Barrel; IBM; Visa
Oracle	Digital intelligence platform	NA 65%; EMEA 25%; AP 10%*	Financial services; technology; media*	Vendor did not disclose
Sitecore	Digital intelligence platform	NA 49%; EMEA 35%; AP 16%	Financial services; manufacturing; healthcare	L'Oréal; Proctor & Gamble; Volvo Cars

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 4 Now Tech Large Vendors: Digital Intelligence Technologies, Q2 2019 (Cont.)

LARGE >$50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
Snowflake	Engagement data hub	NA 70%; EMEA 20%; AP 10%*	Financial services; retail; healthcare*	Vendor did not disclose
Tealium	Engagement data hub	NA 63%; LATAM 2%; EMEA 26%; AP 9%	Media and entertainment; retail; travel and hospitality	3M; Domino's; Providence St. Joseph Health
Teradata	Engagement data hub	NA 45%; LATAM 5%; EMEA 45%; AP 5%	Financial services; retail; telecommunications	Standard Charter; Ticketmaster; Verizon
Verint ForeSee	Digital analytics	NA 83%; LATAM 1%; EMEA 15%; AP 1%	Retail; public sector; financial services	AAA; AMD; T-Mobile

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 5 Now Tech Midsize Vendors: Digital Intelligence Technologies, Q2 2019

MIDSIZE $16M to $50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
AT Internet	Digital analytics	NA 10%; LATAM 5%; EMEA 75%; AP 10%	Media, entertainment, and leisure; financial services; retail	AXA; BBC; Deutsche Telekom; France Television; Total
Certona	Experience optimization	NA 60%; LATAM 5%; EMEA 10%; AP 25%*	Retail; industrial products; consumer products*	Vendor did not disclose
Clicktale	Digital analytics	NA 71%; LATAM 1%; EMEA 22%; AP 6%	Retail; financial services; technology	Adobe; RBS; TechStyle Fashion Group
Cxense	Digital intelligence platform	NA 28%; LATAM 8%; EMEA 31%; AP 33%	eCommerce; publishing; retail	Mainichi; Mediahuis; Wall Street Journal
Ensighten	Engagement data hub	NA 75%; EMEA 25%	Financial services; retail; travel*	Vendor did not disclose
Evergage	Digital intelligence platform	NA 75%; LATAM 5%; EMEA 10%; AP 10%	Financial services; retail; technology	Endurance International Group; Lenovo; Publishers Clearing House
Heap	Digital analytics	NA 75%; EMEA 25%	eCommerce; financial services; technology	Admiral Group; Casper; Cloudflare
Leanplum	Experience optimization	NA 65%; LATAM 2%; EMEA 15%; AP 18%	Media; retail; travel	AMC; Grab; Tinder
Localytics	Digital intelligence platform	NA 68%; LATAM 9%; EMEA 20%; AP 3%	Lifestyle; media and entertainment; retail	Albertson's; Bloomberg; GoPro; Macy's; The Weather Channel
Monetate	Experience optimization	NA 60%; EMEA 40%	Retail; travel and hospitality; insurance	Brooks Brothers; Eurostar; National Geographic

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 5 Now Tech Midsize Vendors: Digital Intelligence Technologies, Q2 2019 (Cont.)

MIDSIZE $16M to $50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
NGDATA	Engagement data hub	NA 40%; EMEA 45%; AP 15%	Financial services; hospitality; utilities	Belfius; Bouygues; Essent; Liberty Global; Wells Fargo
RichRelevance	Experience optimization	NA 40%; LATAM 10%; EMEA 40%; AP 10%	Retail; consumer packaged goods; B2B	B2W; CDW; Jet.com; L'Oréal; Spiraledge
SAS	Digital intelligence platform	NA 37%; LATAM 10%; EMEA 43%; AP 10%	Financial services; retail; telecommunications	Chicos; Drogerie Markt; Telecom Italia
Signal	Engagement data hub	NA 45%; LATAM 3%; EMEA 7%; AP 45%*	Technology; gaming and gambling; retail and eCommerce	ASOS.com; Electronic Arts; Sky Betting & Gaming
SiteSpect	Experience optimization	NA 50%; EMEA 50%	Financial services; insurance; retail	Eddie Bauer; Esurance; Staples
Webtrekk	Digital analytics	NA 20%; EMEA 30%; AP 50%*	Consumer products; financial services; media, entertainment, and leisure*	Vendor did not disclose

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 6 Now Tech Small Vendors: Digital Intelligence Technologies, Q2 2019

SMALL <$16M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
AB Tasty	Experience optimization	NA 15%; LATAM 1%; EMEA 80%; AP 4%	eCommerce; travel; retail	Ashley HomeStore; Best Western; Sephora
ActionIQ	Engagement data hub	NA 100%*	Retail; hospitality; telecommunications*	Vendor did not disclose
Appsee	Digital analytics	NA 40%; LATAM 10%; EMEA 30%; AP 20%	eCommerce; financial services; travel	AIG; eBay; Verizon
Boxever	Digital intelligence platform	LATAM 20%; EMEA 40%; AP 40%	Financial services; travel	Aer Lingus; AIB; Emirates; Jetstar
Celebrus	Engagement data hub	NA 40%; EMEA 40%; AP 20%	Retail; banking; travel and hospitality	Bank of America; BNP Paribas; Delta Air Lines; HSBC; Toyota
CleverTap	Digital intelligence platform	NA 21%; LATAM 7%; EMEA 5%; AP 67%	Media and entertainment; food delivery; ride sharing	Domino's; Fandango LATAM; Go-Jek; Sony; Vodafone
Decibel	Digital analytics	NA 35%; EMEA 65%	Financial services; retail; travel	Allstate Insurance; British Airways; LEGO
Dynamic Yield	Experience optimization	NA 42%; LATAM 1%; EMEA 46%; AP 10%	Retail; financial services; consumer services	HelloFresh; Sephora; Urban Outfitters
FullStory	Digital analytics	NA 85%; LATAM 5%; EMEA 5%; AP 5%*	Retail; travel*	Vendor did not disclose
GoodData	Digital analytics	NA 78%; LATAM 5%; EMEA 15%; AP 2%	FSI; ISV; technology	Broadbridge; Zalando; Zendesk

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 6 Now Tech Small Vendors: Digital Intelligence Technologies, Q2 2019 (Cont.)

SMALL <$16M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
HiConversion	Experience optimization	NA 69%; EMEA 28%; AP 3%	eCommerce	Auto Nation; Rockport; Timex
Relay42	Engagement data hub	NA 5%; EMEA 85%; AP 10%*	Retail; travel*	Vendor did not disclose
Userlytics	Experience optimization	NA 80%; EMEA 20%*	Retail; technology*	Vendor did not disclose
UserReplay	Digital analytics	NA 75%; EMEA 25%	Financial services; retail; travel	Comcast; Papa Johns; Target
Wingify	Digital intelligence platform	NA 30%; EMEA 20%; AP 50%*	Media, entertainment, and leisure; retail; transportation*	Vendor did not disclose

*The vendor did not provide information for this cell; this is Forrester's estimate.

Recommendations

Do Your Homework Before Making Further Technology Investments

CI pros can achieve maximum value from their next DI investment only if it is synchronized with their firm's overall objectives and existing infrastructure for digital customer understanding and engagement. To do this:

› **Direct your technology investment with a DI strategy.** You must apply DI continuously, across all touchpoints and customer engagement functions — at high degrees of coordination and speeds necessary to achieve the scale of application needed for competitive differentiation. This demands an enterprisewide practice that can only occur when all teams leverage a common set of DI technologies around which they can coordinate a single view of customer engagement.

› **Consider ecosystem and integration capabilities when choosing DI tech.** No one product or vendor provides all of the digital intelligence capabilities needed to build a world-class DI tech stack. Prioritize vendor products that work well with third-party DI components as well as those supported by agencies and partners that you'll need to accelerate the adoption, implementation, and ROI of your investment.

- **Assess the state of your DI practice before making further investments.** Tactical buying has led to a siloed and redundant technology profile for many firms. Before your next investment in DI, review and adjust for success factors that have an impact on ROI. Assess your firm's digital strategy, its supporting organizational structure and people investment, your measurement and experience optimization plan, and your awareness of existing technology investments. Forrester's DI maturity measurement methodology can help.[5]

Supplemental Material

Market Presence Methodology

We defined market presence in Figure 1 based on annual revenues generated from vendors' digital intelligence technology products.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

Companies Interviewed 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
ActionIQ
Adobe
AdTheorent
Appsee
AT Internet
BlueConic
BMC Software
Boxever
Celebrus
Certona
CleverTap
Clicktale
Convert
Cxense
Decibel
Dynamic Yield
Ensighten
Evergage
FullStory
GoodData
Google
Heap
HiConversion
IBM
InnoCraft
Leanplum
Lemnisk
ListenFirst
Localytics
Marketing Evolution
Mixpanel
Monetate
NetBase
NGDATA
OpinionLab
Optimizely
Oracle
Placed
PlaceIQ
Quantum Metric
Relay42

RichRelevance

SAP

SAS

Signal

Singular

Sitecore

SiteSpect

Snowflake

Sprinklr

Squirro

SwiftIQ

Swrve

Tealium

Teradata

Thinknear by Telenav

Urban Airship

Userlytics

UserReplay

Verint ForeSee

Wingify

Webtrekk

Woopra

Endnotes

[1] Insights-driven businesses apply data and analytics to decisions, actions, and experiences at scale that make a real and sustained difference. They are growing at an average of more than 30% annually and are on track to earn $1.8 trillion by 2021. See the Forrester report "Insights-Driven Businesses Set The Pace For Global Growth."

[2] The recent Forrester Wave™ report on leading web analytics products noted that web analytics remains the single most dominate digital analytics technique. In fact, many web analytics products have evolved functionality beyond traditional browser measurement and reporting and can be considered to be complete digital analytics solutions. See the Forrester report "The Forrester Wave™: Web Analytics, Q4 2017."

[3] The recent Forrester Wave report on leading web analytics products defined experience optimization practices as "an analytics-driven approach that seeks to leverage every customer interaction to evolve the understanding of the customer, which is in turn used to evolve and optimize current and future customer experiences." The report identifies and evaluates the eight most significant vendors offering experience optimization solutions: Adobe, Dynamic Yield, Evergage, Monetate, Optimizely, Oracle, SAS, and SiteSpect. See the Forrester report "The Forrester Wave™: Experience Optimization Platforms, Q2 2018."

[4] The recent Forrester Wave report on leading digital intelligence platform providers defined digital intelligence as "the practice of developing a holistic understanding of customers across digital touchpoints for the purposes of optimizing and perfecting the experiences delivered and decisions made by brands during moments of engagement." The report identifies and evaluates the 10 most significant vendors offering digital intelligence platforms: Adobe, Cxense, Evergage, Google, IBM, Localytics, Mixpanel, Optimizely, SAS, and Webtrekk. See the Forrester report "The Forrester Wave™: Digital Intelligence Platforms, Q2 2017."

[5] Forrester provides CI pros with a self-assessment and scoring model that complements and feeds Forrester's digital intelligence road map report. See the Forrester report "Measure Your Digital Intelligence Maturity" and see the Forrester report "Optimize Customer Experience With A Digital Intelligence Road Map."

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