

The Forrester Tech Tide™: Martech For B2C Marketers, Q2 2018

Twenty Technologies Underpin Modern Marketing

by Mary Pilecki, Stephanie Liu, Erna Alfred Lioukas, Tina Moffett, Ryan Skinner, Joe Stanhope, and Rusty Warner

April 5, 2018

Why Read This Report

Marketing technology (martech) is essential to delivering contextually relevant experiences to consumers. Firms are continuously evaluating and adopting a range of martech to support customer obsession, but the hundreds of technology solutions present a tangled web of options for today's marketer. This Forrester Tech Tide™ report presents an analysis of the maturity and business value of the martech categories that support modern marketing. B2C marketers should use this report to help shape their firm's investment approach to these technologies.

Key Takeaways

Technologies That Enable Channel-Agnostic Customer Experiences Are On The Rise

As consumers' expectations for omnichannel experiences grow, marketers should invest in the technologies that enable seamless brand experiences regardless of channel. Technologies such as cross-channel identity resolution will play a vital role in bringing omnichannel marketing to life.

Channel-Siloed Technologies Are On The Decline

Many channel-specific technologies, such as social media management and email services platforms, are mature and continue to deliver business value. Their long-term survival will require innovation and potential consolidation with broader platforms to grow beyond their channel-specific origins and meet marketers' omnichannel demands.

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[Predictions 2018: The Revolution That Is Customer-Obsessed Marketing Finally Begins](#)

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Leverage Martech For Seamless Customer Brand Experiences

Customers expect an unprecedented level of speed and personalization from brand interactions. These demands have marketers scrambling to adjust to privacy regulations, become customer-obsessed, and demonstrate their brand values.¹ Efforts to reach the right customer at the right time, on the right channel, and with the right content can more closely resemble an episode of *Tom and Jerry* than an orchestrated marketing campaign. That's where martech comes in. Marketers can use distinct platforms for leveraging customer data, utilizing campaign management tools, collecting intelligence, managing content, engaging customers, and measuring all these efforts. But while martech is evolving to meet consumers' demands and behaviors, the landscape of more than 5,000 solutions, with nearly 4,900 vendors and 50 categories, has left marketers with the unenviable task of filtering the available options to select and deploy the right tools.²

The Technologies That Make Up Customer-Obsessed Marketing

Forrester surveyed technology decision makers, suppliers, and other subject matter experts in our search for the most important marketing technologies. Each of the technology categories analyzed in this Forrester Tech Tide:

- › **Is an important contributor to marketing efficiency and effectiveness.** These technologies help marketers identify customers and then develop and orchestrate campaigns based on this layer of customer understanding. For this reason, we excluded artificial intelligence and machine learning as standalone technologies because we consider these to be enabling technologies that support some of the martech listed below. Similarly, while intelligent agents are growing in popularity, they aren't yet essential to marketing.
- › **Is commercially available at enterprise scale.** The vendors that offer these 20 technologies vary in size, regional focus, and market approach but can support the scale of programs and interactions required by very large brands deploying these technologies across global organizations. Most of the vendors that support these technologies either have or can support enterprisewide deployments.
- › **Has (or will have) market traction.** We frequently advise marketers to avoid "shiny object syndrome." Thus, we included only technologies that have market traction and that marketers we speak with are considering, testing, or actively using. For example, we excluded consumer data platforms (CDPs) from this report because the landscape is currently populated by a set of vendors that do very different things, and we haven't seen any real market traction with marketers or other end users.³

Select Martech That Offers High Business Value

The central 2x2 graphic offers a summary of the state of the technology categories that comprise modern marketing (see Figure 1).

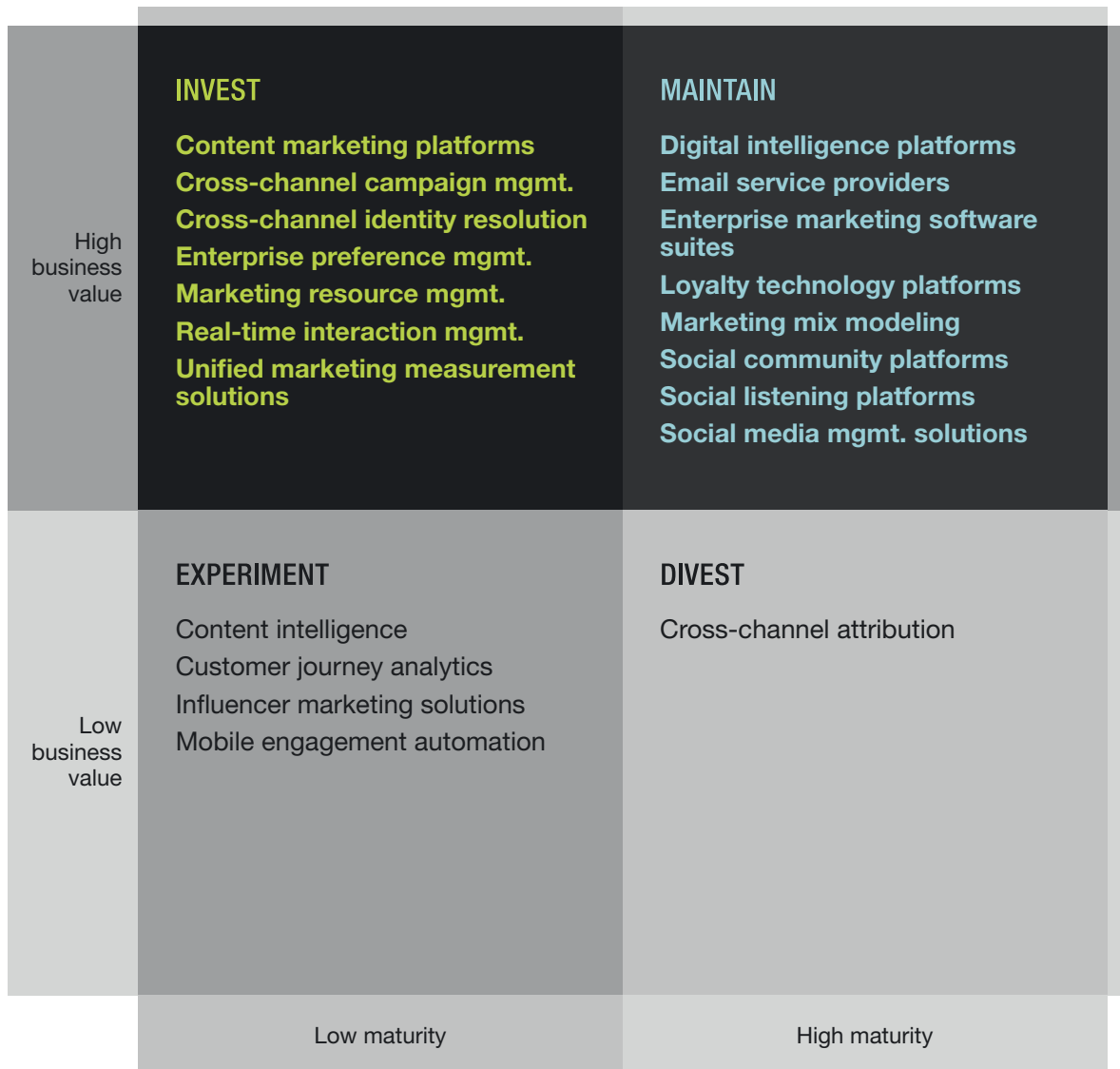
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FIGURE 1 Tech Tide™: Martech For B2C Marketers, Q2 2018

**TECH
TIDE**

Martech For B2C Marketers
Q2 2018



Evaluate Business Value And Maturity For Each Modern Marketing Technology

The categories are plotted on two dimensions:

- › **Business value.** This is the expected business return on technology investment over the reasonable lifetime of the technology. For marketing technologies, business value translates into: 1) automating key processes; 2) tracking and measuring key performance indicators (KPIs) and results of marketing tactics; 3) supporting the customer experience; and 4) enabling the use of customer information for more contextual interactions.
- › **Maturity.** We derived each marketing technology's maturity level by vetting survey respondents' inputs on their biggest challenges (or perceived challenges) with leveraging each technology; the nature of the vendors that respondents and clients most commonly mentioned (i.e., startups, specialty shops, or enterprise cloud providers); and our own knowledge of the technology.

Determine Strategies For Modern Marketing Based On Business Value And Maturity

The business value and maturity dimensions, in turn, position each category in one of four quadrants:

- › **Experiment.** Low maturity and low business value characterize technologies in the Experiment zone. Most enterprises should limit their exposure to these technologies to bounded experiments, waiting for the expected business value of these newer categories to improve before investing.
- › **Invest.** Low maturity and high business value characterize technologies in the Invest zone. These new technologies have ripened to the point where enterprises can confidently invest.
- › **Maintain.** High maturity and high business value characterize technologies in the Maintain zone. These are the bread-and-butter technologies that most enterprises rely on to run their business. They're generally stable, well-understood technologies that continue to have high returns to the business. Most enterprises should maintain their installations and usage of these technologies.
- › **Divest.** High maturity and low business value characterize technologies in the Divest zone. These older technology categories have reached a point where their business value has dropped. Most enterprises should be looking for newer, higher-value replacements and divesting from these categories.

Focus Martech Investments On Cross-Channel Capabilities

In today's world of channel-agnostic consumers, martech means investing in the technologies that enable you to orchestrate cross-channel messages and experiences, because your customers expect holistic experiences, regardless of channel. The channel-specific technologies we include in this report are still sold on a standalone basis, but look for some of them to be integrated into some of the larger solutions as well, such as cross-channel campaign management. In mapping the futures of the technologies and services in the modern marketing ecosystem, we found that:

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- › **Cross-channel technologies are on the rise.** Forrester defines cross-channel as anything that coordinates a subset of channels. Contrast this with omnichannel, which is the strategic coordination of *all* channels — online, offline, and paid, owned, or earned — as determined by a brand's context and channel mix. Martech continues to evolve its cross-channel capabilities and will ultimately become omnichannel. Nearly all the technologies in the Invest quadrant focus on cross-channel marketing. Whether that means consolidating content with content marketing platforms or tracking cross-channel marketing performance with unified measurement solutions, marketers must adopt the channel-agnostic mindset of their customers to deliver truly holistic experiences.
- › **Channel-specific technologies are on the decline.** Channel-specific technologies still offer business value, but we expect them to decline over the long term as channel technologies consolidate. For example, many large enterprise marketing software suites have capabilities that encompass nearly every technology listed in the Maintain quadrant, with only one or two exceptions.
- › **Identity is moving to the forefront.** As B2C marketers pursue the Holy Grail of one-to-moment marketing, personas aren't going to cut it. Instead, marketers must truly know who their customers are, using cross-channel identity resolution technology. But to avoid being creepy, they must also respect consumers' privacy and earn their trust; for example, by using enterprise preference management.⁴ The importance of identity and privacy will continue to grow as policies such as the European Union's General Data Protection Regulation (GDPR) give consumers increasing rights over their data and how it's used.⁵

Experiment With Content Intelligence, Mobile Engagement Automation, And Others

Four of the 20 modern marketing technologies fall into the Experiment quadrant of the Tech Tide, with low maturity and low current business value.

- › **Content intelligence.** Everyone has a favorite tool in the toolbox or garment in the closet that they can't quite find the perfect use for; that's content intelligence today. The potential for optimizing content that, in a remarkable way, understands itself and its own meaning is enormous, but creating applications for it is harder. Big players like Adobe and IBM are pouring developer hours and weeks into the space, and so is a growing cast of ambitious smaller vendors. Given the malleability of content and its universality in marketing activities, there's likely room for many more players. Watch this space (see Figure 2).
- › **Customer journey analytics.** Customer journey analytics provide invaluable insights by focusing on high-level journeys and zooming in on microjourneys to isolate, quantify, model, and track opportunities to improve customer experience, operational efficiency, and business results. Reaping the full benefit of customer journey analytics requires integration and collaboration with teams that traditionally fall outside of marketing, so marketers will most likely need cross-organizational buy-in to implement customer journey analytics and act on its outputs (see Figure 3).

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- › **Influencer marketing solutions.** In 2016 and 2017, it seemed as if a new influencer vendor announced itself every day. Marketers, reeling from dual shocks of challenged ad visibility and challenged organic reach, have latched onto influencers the way a drowning man grabs at a buoy. But as this is essentially just a new kind of native advertising, it'll have the same fate as its predecessors: breakout success in contexts where it works (like Google's paid search ads and Facebook's suggested posts) and invisibility or loathing where it doesn't. These technologies will accelerate influencer marketing's success or failure (see Figure 4).
- › **Mobile engagement automation (MEA).** Successful mobile engagement is highly personal and individualized. It achieves this through an advanced set of customer, behavior, location, and device data and the sheer speed of real-time interactions. Mobile marketing also requires access to a wide variety of touchpoints spanning messaging, notifications, apps, and even mobile wallets. Few legacy marketing applications are engineered for the velocity and breadth of mobile engagement. A new class of marketing automation tool — mobile engagement automation — is emerging to specifically address this opportunity. Marketers need mobile-first solutions to provide insights, execution, and delivery capabilities specifically for the mobile ecosystem (see Figure 5).

FIGURE 2 Experiment: Content Intelligence


<div style="display: flex; align-items: center; margin-bottom: 10px;">  <div style="margin-left: 10px;"> <p>Strategy: EXPERIMENT</p> </div> </div> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↓ Low</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Acrolinx, Adobe, Idio, Persado, Smartlogic, Stackla</p>	<h2 style="margin: 0;">Content intelligence</h2> <p>Definition Content intelligence refers to the use of artificial intelligence (AI) technologies to understand and capture the qualities inherent in any content — its emotional appeal, style, subject matter, tone, or sentiment, for example.</p> <p>Maturity rationale Many vendors emerged from labs and academia only years ago, with groups working on different forms of natural language processing and semantic computing. Both vendors and users are feeling their way toward the best approaches to draw advantage from content intelligence.</p> <p>Business value rationale Forms of content intelligence are many, but their application to marketing problems is not always straightforward. Persado uses content intelligence to drive double-digit increases in email open rates, for example. One day these vendors will be able to realize the full value of one-to-one relationships between content and reader, but not in the next few years.</p>
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FIGURE 3 Experiment: Customer Journey Analytics



 <p>Strategy: EXPERIMENT</p> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↓ Low</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS ClickFox, IBM, KiteWheel, Kynsale, Pointillist, SAS, Thunderhead</p>	<h2 style="margin: 0;">Customer journey analytics</h2> <p>Definition Customer journey analytics combine quantitative and qualitative data to analyze customer behaviors and motivations across touchpoints and over time to optimize customer interactions and predict future behavior.</p> <p>Maturity rationale While marketers may understand the value of customer journey analytics, they may struggle with implementation. Marketers must centralize data to enable customer journey analytics. To operationalize its findings, they need proper internal organization and enough content and touchpoints to address customers' various journeys. Many marketers aren't quite ready for customer journey analytics.</p> <p>Business value rationale Analyzing macro and micro journeys allows marketers to proactively enhance existing known journeys for customers, identify where a brand needs to interject, and nudge customers along more cost-efficient paths. As of today, the business impact is unknown; therefore, marketers must experiment and run tests to improve existing journeys.</p>
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FIGURE 4 Experiment: Influencer Marketing Solutions

<div style="display: flex; align-items: center; margin-bottom: 10px;">  <div> <p>Strategy: EXPERIMENT</p> </div> </div> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↓ Low</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Cision, Collective Bias, Experticity, Famebit (Google), Launchmetrics, Linqia, Mavrck, Tap Influence, Whosay (Viacom)</p>	<h2 style="margin-top: 0;">Influencer marketing solutions</h2> <p>Definition Influencer marketing solutions are offerings that (usually) combine proprietary software and managed services to find, contact, manage, publish, and assess digital influencers for product or content placement, content creation, or media activation.</p> <p>Maturity rationale Influencer marketing solutions are still an emerging category that overlaps with social listening platforms in identifying influencers and with content marketing platforms in managing and producing content with these creators. As many as 100 vendors exist, and about a dozen have already folded or pivoted.</p> <p>Business value rationale Most vendors count engagements and extrapolate from there rather than track success against real business metrics. Vendors provide stories of transformative sales and business impact, but the value is not always tied inextricably to vendors' contribution.</p>
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FIGURE 5 Experiment: Mobile Engagement Automation

 <p>Strategy: EXPERIMENT</p> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↓ Low</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Adobe, Braze (formerly Appboy), IBM, Leanplum, Localytics, Oracle, Swrve, Urban Airship</p>	<h2>Mobile engagement automation (MEA)</h2> <p>Definition MEA uses real-time and contextual insights to proactively engage with known users in the appropriate mobile moment across the customer life cycle via a mobile device.</p> <p>Maturity rationale Today, these solutions primarily fuel engagement in the form of mobile messaging and notifications. In the future, they'll play a role in the dynamic assembly of microservices based on real-time context. Effective mobile engagement at scale requires specific purpose-built capabilities designed for the full range of mobile touchpoints and provides contextual recognition and delivery in mobile moments.</p> <p>Business value rationale As mobile devices become the default point of contact for brands to interact with consumers, firms must take a mobile-first approach to customer engagement. Brands need appropriate technology to back up a complete mobile engagement strategy to personalize customer interactions in real time across mobile touchpoints.</p>
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Invest In Content Marketing Platforms, Cross-Channel Identity Resolution, And Others

Seven of the 20 modern marketing technologies fall into the Invest quadrant of the Tech Tide, with low maturity and high current business value.

- › **Content marketing platforms (CMPs).** Darling newcomers no more, CMPs have the market wondering whether they'll become as ubiquitous as marketing automation or age into endless adolescence the way marketing resource management has. Like marketing automation, CMPs can create transformative value but demand lots of new skills from marketers; they involve large groups within the organization, which can make them even tougher to implement successfully. Expect neighboring categories such as digital asset management and web content management to continue to edge their way into this space — a boon to marketers but a challenge to today's CMPs (see Figure 6).

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- › **Cross-channel campaign management (CCCM).** Coordinating and optimizing cross-channel interactions is a critical capability for B2C marketers, and CCCM effectively supports the increasing complexity of these interactions. Prior research has identified that many brands leverage their CCCM solutions to address an average of six channels today, and more than one-third of brands currently support or plan to support 14 different digital and offline channels in the next two years (see Figure 7).⁶
- › **Cross-channel identity resolution.** Legacy approaches of storing fragmented customer identities at the channel or application level fall short in an era when marketers must orchestrate and deliver cohesive cross-channel experiences. Marketers increasingly see identity resolution as the fundamental enabler for complete measurement, accurate targeting, relevant personalization, and delivery of interactions in the right channel and device. The flurry of activity by both marketers and suppliers in the market today reflects the recognition of identity resolution as a strategic capability that requires holistic planning and investment (see Figure 8).
- › **Enterprise preference management (EPM).** EPM enables marketers to collect consent and opt-in while simultaneously capturing immensely valuable zero-party data — information that’s explicitly and intentionally shared by customers.⁷ Marketers cite low consumer adoption to explain why they tremendously underutilize this martech. But they’re missing an opportunity: Marketers can use EPM as a repository for the single source of truth as it relates to customer identity and integrate with marketing execution platforms to ensure compliance with customer preferences for frequency, channel, and content (see Figure 9).
- › **Marketing resource management (MRM).** MRM tools facilitate marketing operations, from financial planning to marketing fulfillment and overall project management. Modern MRM solutions differ from overcomplicated legacy tools in that they enable insight-driven customer engagement. As standalone on-premises legacy platforms give way to best-of-breed software-as-a-service (SaaS) point solutions, marketers profit from a new, diverse range of competitive options. But the current MRM market is fragmented, and many vendors offer overlapping functionality. Successful marketers will: 1) ensure that MRM tools integrate seamlessly into their EMT ecosystem; 2) balance processes and compliance with collaboration and empowerment; 3) define customer-focused metrics for improving marketing operations; and 4) focus on transforming the marketing organization for greater agility (see Figure 10).⁸
- › **Real-time interaction management (RTIM).** RTIM personalizes messages based on customer behavior and adjusts campaigns based on real-time contextual information. B2C marketing pros add RTIM functionality to their martech ecosystems to address core requirements for customer recognition, contextual understanding, decision arbitration, offer orchestration, and measurement and optimization.⁹ Successful RTIM implementations put the focus of marketing efforts where it belongs — on the customer.¹⁰ Successful marketers will choose RTIM vendors that understand enterprise business technology integration and vertical-specific business strategies and that offer simplified pricing structures (see Figure 11).¹¹

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- › **Unified marketing measurement solutions.** Unified measurement solutions represent the evolution of marketing performance measurement: They meld aggregate-level performance results with customer-level marketing results to capture complex insights such as cross-channel relationships and halo effects. These solutions are relatively new, but the potential impact could be enormous because it accounts for both short-term revenue impact and long-term effects like shareholder value. Barriers to adoption include complexity of insights and companywide buy-in. These solutions are costly — prices start in the high six-figure range and vary based on client data requirements, solution license, account support, and in some cases, marketing budget spend (see Figure 12).

FIGURE 6 Invest: Content Marketing Platforms


 <p>Strategy: INVEST</p> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Contently, Kapost, NewsCred, Percolate, ScribbleLive, Skyword, Sprinklr</p>	<h2 style="margin: 0;">Content marketing platforms (CMPs)</h2> <p>Definition CMPs help marketing teams collaborate on content strategy; orchestrate concurrent activity streams by content creators, curators, and distributors; and optimize downstream cross-channel distribution to key audiences.</p> <p>Maturity rationale CMPs integrate and compete with adjacent categories (e.g., digital asset management and web content management) as expected in a maturing space. Most CMPs have funding rounds of \$10 million to more than \$40 million; investors and the market ask if they will take off or fizzle.</p> <p>Business value rationale CMP users derive significant value from having all of their content planning and workflow in a single environment. As brands discover the benefits of preparing content for omnichannel contexts, the business value accretes even more quickly. The work required to get there (e.g., better metadata and content modeling) will demand more technical support and consulting than what CMPs provide today.</p>
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FIGURE 7 Invest: Cross-Channel Campaign Management

<div data-bbox="315 415 423 522"> </div> <p data-bbox="435 438 537 499">Strategy: INVEST</p> <p data-bbox="315 558 435 583">MATURITY</p> <p data-bbox="315 590 399 617">↓ Low</p> <p data-bbox="315 661 518 688">BUSINESS VALUE</p> <p data-bbox="315 695 402 722">↑ High</p> <p data-bbox="315 768 524 795">LIFE-CYCLE COST</p> <p data-bbox="315 802 363 829">\$\$\$</p> <p data-bbox="315 875 532 903">SAMPLE VENDORS</p> <p data-bbox="315 909 599 1081">Adobe, Cheetah Digital, Emarsys, IBM, Oracle, Pegasystems, Pitney Bowes, RedPoint Global, Salesforce, SAP Hybris, SAS, Selligent</p>	<h2 data-bbox="699 426 1260 527">Cross-channel campaign management (CCCM)</h2> <p data-bbox="699 564 813 590">Definition</p> <p data-bbox="699 594 1373 705">CCCM is an enterprise martech that supports customer data management, analytics, segmentation, and workflow tools for designing, executing, and measuring campaigns for digital and offline channels.</p> <p data-bbox="699 739 902 764">Maturity rationale</p> <p data-bbox="699 768 1409 940">While CCCM has been available for over a decade, it continues to evolve to accommodate new channels and campaign tactics. Vendors have made significant investments in growing capabilities — most recently to address contextually relevant customer interactions. And CCCM is currently on a path to converge with RTIM.</p> <p data-bbox="699 974 979 999">Business value rationale</p> <p data-bbox="699 1003 1406 1173">Brands have improved the efficiency and effectiveness of their cross-channel interactions via CCCM. Value will continue to grow as brands embrace contextually relevant campaigns and real-time offers, and as vendors improve predictive analytics and optimization capabilities. But data integration will limit the impact of these tools for some brands.</p>
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FIGURE 8 Invest: Cross-Channel Identity Resolution

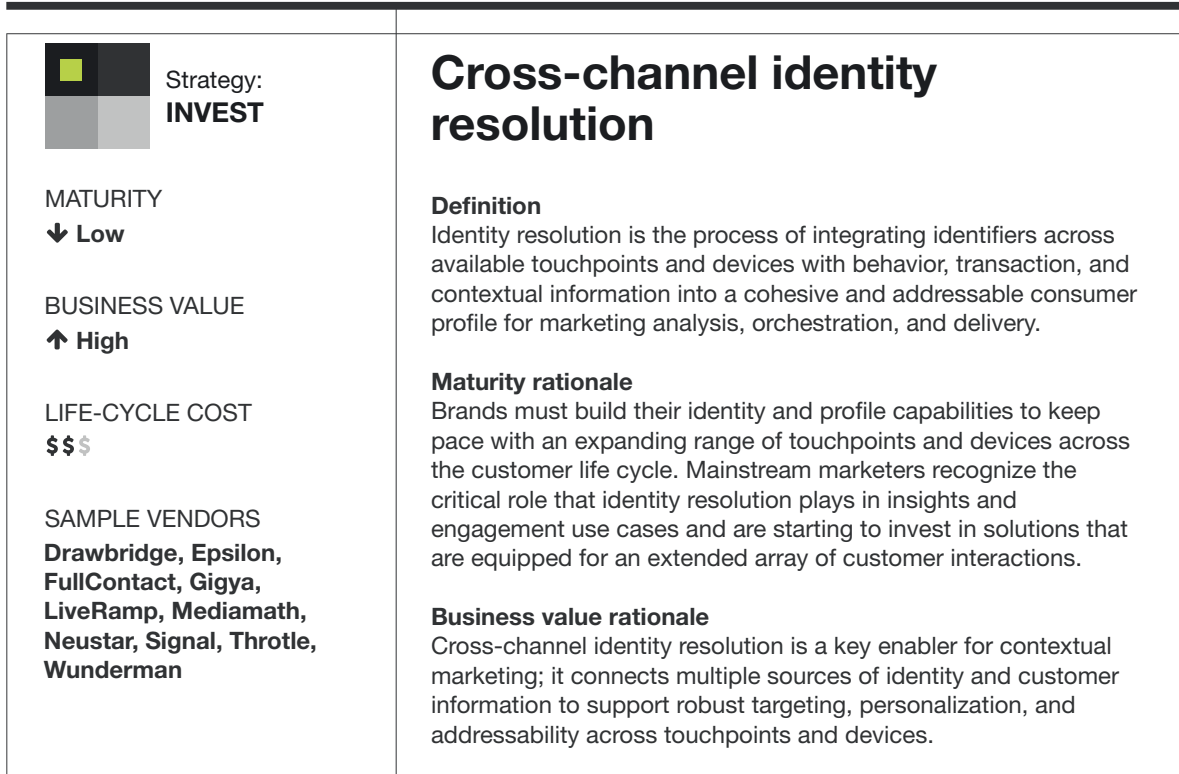


FIGURE 9 Invest: Enterprise Preference Management

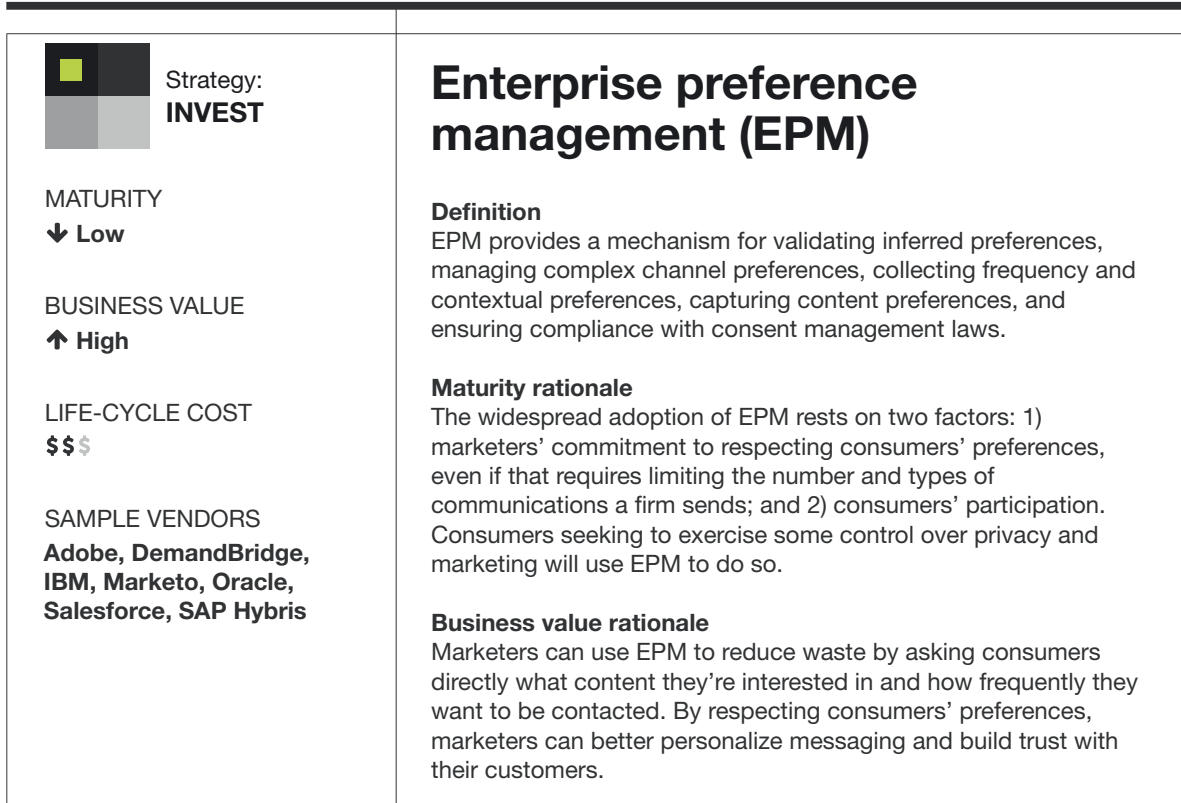


FIGURE 10 Invest: Marketing Resource Management



 <p>Strategy: INVEST</p> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Allocadia, Ansira, Aprimo, BrandMaker, BrandMuscle, censhare, Code Worldwide, IBM, Infor, Percolate, SAP Hybris, SAS, Stylelabs, Wedia, Workfront</p>	<h2 style="margin: 0;">Marketing resource management (MRM)</h2> <p>Definition MRM helps marketers with financial planning, performance measurement, collaboration and calendaring, project management, content production, asset management, brand compliance, and marketing fulfilment.</p> <p>Maturity rationale MRM platforms have come a long way since they began evolving in 2011 to support contextual marketing requirements. Today, a tranche of new marketer-friendly tools replaces legacy MRM solutions with agile alternatives, and vendors continue to invest in advancements.</p> <p>Business value rationale Marketers can't afford to ignore MRM because it can help them balance operational control with user flexibility to manage four workstreams: money, people, content, and brand, as well as provide insights to align marketing investments with business performance. Successful marketers will use their operational requirements to drive MRM's value.</p>
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FIGURE 11 Invest: Real-Time Interaction Management

<div data-bbox="315 415 423 525"> </div> <p data-bbox="435 436 537 499">Strategy: INVEST</p> <p data-bbox="315 558 435 583">MATURITY</p> <p data-bbox="315 590 399 617">↓ Low</p> <p data-bbox="315 661 518 688">BUSINESS VALUE</p> <p data-bbox="315 695 402 722">↑ High</p> <p data-bbox="315 766 526 793">LIFE-CYCLE COST</p> <p data-bbox="315 800 367 827">\$\$\$</p> <p data-bbox="315 871 534 898">SAMPLE VENDORS</p> <p data-bbox="315 905 613 1052">Adobe, Emarsys, FICO, IBM, IgnitionOne, Infor, Pegasystems, Pitney Bowes, Rocket Fuel, Salesforce, SAS, Teradata</p>	<h2 data-bbox="699 422 1170 520">Real-time interaction management (RTIM)</h2> <p data-bbox="699 562 813 590">Definition</p> <p data-bbox="699 596 1409 680">RTIM is enterprise marketing technology that delivers contextually relevant experiences, value, and utility at the appropriate moment in the customer life cycle via preferred customer touchpoints.</p> <p data-bbox="699 709 906 737">Maturity rationale</p> <p data-bbox="699 743 1382 890">RTIM is a relatively new tool that requires the evolution of marketing technologies as well as collaborative business processes to fully mature. Current RTIM implementations vary widely in maturity levels, and customers we interviewed in 2017 universally agreed that it is an evolutionary process.</p> <p data-bbox="699 919 980 947">Business value rationale</p> <p data-bbox="699 953 1414 1121">Forrester views RTIM as a critical enterprise marketing technology (EMT) component, with significant potential to disrupt the way firms engage with their customers over the next three years. Successful RTIM implementations support B2C marketing's efforts to assemble a unique EMT ecosystem to deliver contextually relevant customer experiences.</p>
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FIGURE 12 Invest: Unified Marketing Measurement Solutions

 <p>Strategy: INVEST</p> <p>MATURITY ↓ Low</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Analytic Partners, Data2Decisions, IRI, Marketing Evolution, Neustar MarketShare</p>	<h2>Unified marketing measurement solutions</h2> <p>Definition Unified marketing measurement solutions blend statistical techniques that assign business value to each element of the marketing mix at both a strategic and tactical level. The results allow marketers to build optimization models and determine marketing investment strategy.</p> <p>Maturity rationale Unified marketing measurement solutions empower marketers to make better day-to-day campaign planning decisions. But to do so, marketers must first understand the shortcomings of attribution or marketing mix modeling, and then integrate data and identify all marketing channels.</p> <p>Business value rationale Unified measurement attracts marketers with its potential impact on short-term revenue while projecting marketing's effectiveness on long-term brand goals. Solutions can help marketers optimize keywords and creative, as well as closely track how marketing drives conversion rates.</p>
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Maintain Enterprise Marketing Software Suites, Social Listening Platforms, And Others

Eight of the 20 modern marketing technologies fall into the Maintain quadrant of the Tech Tide, with high maturity and high current business value.

- › **Digital intelligence (DI) platforms.** Digital intelligence platforms merge and manage multiple data sources describing customer digital interactions, synchronize different digital analytics techniques, and enhance digital customer experiences and business decisions with experience optimization techniques (e.g., testing, targeting, and recommendations). These platforms leverage many of the 15 commonly used digital data, analytics, and optimization technologies to connect customer data and analytics techniques across formerly siloed product lines. They also connect customer, behavioral, engagement, and context data and insights across channels. The individual technologies are metamorphosing into consolidated platforms as large incumbent vendors acquire and integrate DI technologies and as smaller vendors build multiple capabilities preintegrated with a common customer data platform (see Figure 13).¹²

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- › **Email service providers.** Email marketing is entering its next chapter — one where smart marketers maintain its value as a promotions vehicle while also leveraging it for higher-level objectives like innovation and customer identification.¹³ Specialist vendors like Coherent Path and Cordial bring new capabilities to the email medium, while incumbent email service providers like Salesforce streamline the integration of email with the broader martech stack (see Figure 14).
- › **Enterprise marketing software suites (EMSSes).** B2C marketers increasingly turn to EMSS offerings to address the broad and complex feature set of analytical and orchestration tools they need for modern customer engagement.¹⁴ Buyers are becoming more practical in their expectations, emphasizing integrations both within EMSS product sets and with the marketing ecosystem. And EMSS vendors are working overtime to extend their solutions to match marketers' sophisticated requirements. EMSS vendors are making significant investments in data management, services, and identity resolution and adding functionality for analytics and digital advertising. They're also adding critical core services supporting integration and artificial intelligence (AI)-based features (see Figure 15).
- › **Loyalty technology platforms.** Loyalty and rewards programs still dominate the landscape when it comes to identifying, retaining, and growing relationships with loyal customers. Marketers lean on loyalty platforms to manage their programs end to end and, increasingly, are looking for vendors to help them prove the value of their programs and deliver more insight into what makes their customers loyal. The value of first-party loyalty program data is on the rise, but as companies consider loyalty strategies that go beyond points and discounts, the vendors in this space need to show that they can do more than issue points and deliver rules-based offers (see Figure 16).
- › **Marketing mix modeling.** This popular marketing measurement solution has been the most comprehensive tool available for many years, but unified marketing measurement solutions will usurp it. While marketers like the aggregation of offline and online channels into marketing mix modeling, they complain about the lack of tactical recommendations. Marketing mix modeling is a satisfactory tool for many, and we recommend maintaining these solutions as you begin testing unified marketing measurement solutions (see Figure 17).
- › **Social community platforms.** Today, social community platforms connect customers with brands and likeminded customers. While full community platforms aren't necessary for every brand anymore because some capabilities are now available in social media management solutions, they're valuable for marketers who look to their customers for ideation or specific feedback. Vendors in this space offer full-scale support, self-service, or hybrid models to accommodate a variety of brand use cases and needs. With usage on the decline, though, vendors should empower marketers with tools that help them translate the business value of community activities (see Figure 18).
- › **Social listening platforms.** Social listening tools are the backbone of not just social marketing practices but marketing in general, informing marketing, product, and overall business strategy. While the primary two uses cases for these platforms are market research and monitoring and messaging optimization, marketers are finding new opportunities every day.¹⁵ As a result, vendors

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in this space actively seek to integrate with other marketing and business tools; surface insights that can help the entire enterprise; measure intangibles like brand health; and inspire new ideas for product, R&D, and operations teams (see Figure 19).

- › **Social media management solutions (SMMSes).** Today’s SMMS is more than a publishing tool; it’s a brand orchestration vehicle. Workflow, auditing, permissioning, and collaboration capabilities are available in numerous configurations, helping brands execute campaigns while mitigating risk. As social media’s footprint grows across the enterprise, vendors are improving their ability to seamlessly integrate with other martech such as ratings and reviews, social advertising, and social listening (see Figure 20).

FIGURE 13 Maintain: Digital Intelligence Platforms

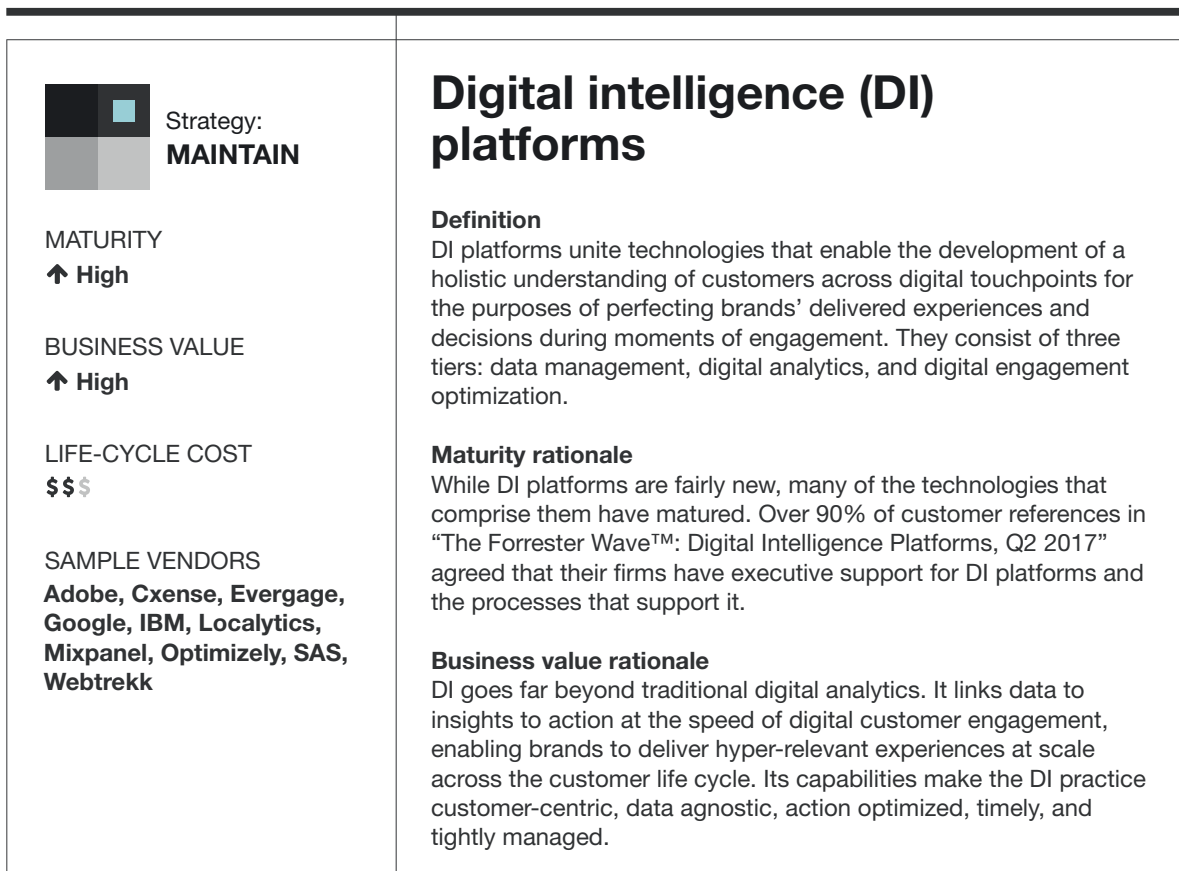


FIGURE 14 Maintain: Email Service Providers


 <p>Strategy: MAINTAIN</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Epsilon, Yes Lifecycle Marketing, Zeta Global</p>	<h2>Email service providers (ESPs)</h2> <p>Definition ESPs offer a first-party platform for the creation and deployment of marketing emails. Most ESPs provide hosted rather than installed solutions.</p> <p>Maturity rationale Email marketing is the workhorse of the digital marketing toolkit because of its long tenure and cost effectiveness. Most marketers will grow their existing email budgets moderately in order to invest in optimizing the medium to create more customized messages and to leverage email for goals outside of direct sales.</p> <p>Business value rationale Email response rates have held consistent even while its costs decline. This makes it an extremely low-cost way for regular, targeted, customer interaction. With emphasis on customer relationships rising, the value of email marketing will only increase.</p>
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FIGURE 15 Maintain: Enterprise Marketing Software Suites


 <p>Strategy: MAINTAIN</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Adobe, IBM, Marketo, Oracle, Salesforce, SAP Hybris, SAS</p>	<h2 style="margin: 0;">Enterprise marketing software suites (EMSSes)</h2> <p>Definition EMSS offers an integrated portfolio of marketing technology products that provide analytics, orchestration, and execution of insight-driven customer interactions to support inbound and outbound marketing.</p> <p>Maturity rationale EMSS is a well-established category currently utilized by a substantial proportion of enterprise marketing organizations. The category has already experienced light consolidation but continues to evolve and extend its relevance as EMSS vendors advance their data management, digital advertising, and integration capabilities.</p> <p>Business value rationale EMSS acts as the core of a brand’s martech stack, coordinating data flows, insights, and engagement across a variety of touchpoints. Coordinating functions within a single EMSS promises to reduce the complexity of deploying, managing, and using marketing technology.</p>
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FIGURE 16 Maintain: Loyalty Technology Platforms



FIGURE 17 Maintain: Marketing Mix Modeling


 <p>Strategy: MAINTAIN</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Fractal Analytics, Hudson River Group, mPHASIZE, OptiMine, Periscope By McKinsey</p>	<h2>Marketing mix modeling</h2> <p>Definition Marketing mix modeling is a marketing measurement methodology that takes a top-down approach: It measures channel performance at an aggregate level but doesn't measure tactical marketing program performance.</p> <p>Maturity rationale Marketing mix modeling has been a staple measurement tool since the 1990s, especially in industries such as consumer packaged goods, auto, and financial services. Its well-understood methodology and the diverse set of vendors offering it make it widely available, though its cost limits use to brands that spend in the tens of millions of dollars on non-addressable advertising (such as print and outdoor).</p> <p>Business value rationale Campaign and message communication metrics such as gross rating points and brand lift are no longer sufficient to justify large advertising budgets. Users typically find they can improve the efficiency marketing budgets by 10% to 30% using marketing mix model insights on initial deployment and use it on an ongoing basis to build a data-driven ROI rationale for future planning and budget allocation decisions.</p>
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FIGURE 18 Maintain: Social Community Platforms



 <p>Strategy: MAINTAIN</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS FuelCycle, Higher Logic, Lithium, Salesforce, Vanilla Forums, Verint</p>	<h2>Social community platforms</h2> <p>Definition Community platforms are purpose-built environments that connect customers with brands and other customers. These platforms provide a wide range of features for customers, including user profiles, discussion boards, polls, and knowledge bases. Brands facilitate community interactions with moderation, content publishing tools, and analytics.</p> <p>Maturity rationale Most marketers are familiar with community platforms due to their long and successful legacy in the customer service space. But community impacts customer acquisition, understanding, and product ideation. As the number of social media options increases, marketers should lead brand discussions, revisiting community as a tactic providing direct access to customers without algorithm complexities.</p> <p>Business value rationale Maintaining a community is a people- and time-intensive tactic. However, both the time and resources it requires are worth the value it brings brands through thoughtful, insights-rich, and, many times, unprompted customer-driven interactions.</p>
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FIGURE 19 Maintain: Social Listening Platforms

 <p>Strategy: MAINTAIN</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Brandwatch, Cision, Clarabridge, Crimson Hexagon, NetBase, Networked Insights, Salesforce, Sprinklr, Synthesio</p>	<h2 style="margin-top: 0;">Social listening platforms</h2> <p>Definition Social listening platforms manage and analyze customer data from social sources and use that data to activate, measure, and recalibrate marketing and business programs.</p> <p>Maturity rationale Social listening platforms may have started with simple brand monitoring, but they now embrace analytics and surface insights that can be used across the enterprise. Marketers have increased their social strategy sophistication and thus the complexity of their social listening platforms' use cases. This makes social listening platforms one of the more mature technology categories in the burgeoning social media landscape — but with room to grow.</p> <p>Business value rationale Social intelligence can fill in the gaps across the enterprise. Social listening platforms help by informing cross-channel campaigns, identifying influencers, providing customer service, measuring brand health, and driving product innovation. Their applicability across the enterprise makes them an in-demand technology with high business value.</p>
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FIGURE 20 Maintain: Social Media Management Solutions


 <p>Strategy: MAINTAIN</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↑ High</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS Facelift, Falcon.io, Hootsuite, Lithium, Percolate, Salesforce, Spredfast, Sprinklr, Sprout Social</p>	<h2>Social media management solutions (SMMSes)</h2> <p>Definition SMMSes help marketers publish, monitor, and respond to customer posts on social networks. SMMS capabilities consist of traditional publishing tools and may include or integrate with: social listening, social advertising, measurement, and rating and review functionalities.</p> <p>Maturity rationale SMMSes are among the most mature social media technologies available. Powerful workflow and collaboration tools facilitate the expansion of social media across the enterprise. SMMSes have been consolidating social tech by acquiring smaller companies to add capabilities such as listening and paid social.</p> <p>Business value rationale SMMS capabilities reinforce approval processes, ensuring posts meet brand and compliance guidelines. This benefit becomes more valuable as compliance needs shift and regulations such as the GDPR are implemented. SMMSes enable collaboration between global and local teams, creating consistency and efficiency.</p>
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Divest From Cross-Channel Attribution

One of the 20 modern marketing technologies falls into the Divest quadrant of the Tech Tide, with high maturity and low current business value.

- › **Cross-channel attribution.** Cross-channel attribution is a well-established, digital-heavy marketing measurement approach that provides marketing directors and media planners with guidance on where and when to optimize digital media. But attribution vendors are consolidating, with large marketing analytics vendors or data providers gobbling up attribution-specific companies; for example, Nielsen's acquisition of Visual IQ.¹⁶ These consolidations indicate that attribution as a standalone solution must evolve and fit into a greater marketing analytics solution set, such as unified marketing measurement (see Figure 21).

FIGURE 21 Divest: Cross-Channel Attribution

 <p>Strategy: DIVEST</p> <p>MATURITY ↑ High</p> <p>BUSINESS VALUE ↓ Low</p> <p>LIFE-CYCLE COST \$\$\$</p> <p>SAMPLE VENDORS C3 Metrics, Flashtalking, Impact Radius, Lityx, Manthan, Neural.ONE, SAP Hybris</p>	<h2>Cross-channel attribution</h2> <p>Definition Cross-channel attribution is a marketing measurement methodology that tracks user interactions across digital and some direct response programs, fractionally allocating credit across different marketing touchpoints. It enables marketers to optimize day-to-day campaign decisions based on the true performance of their initiatives.</p> <p>Maturity rationale Digital-focused marketers turned to attribution to fine-tune marketing measurement approaches and guide keyword bidding parameters or digital media ad placement. Attribution adoption is high as digital marketers can leverage this approach in conjunction with their existing advertising or marketing technology stack.</p> <p>Business value rationale Marketers only using attribution often fail to prove its value on business measures because these solutions cannot measure traditional media or factor in the impact of branding or market forces data (e.g., product price changes or competitive advertising activity). Marketers who rely solely on attribution lack a complete picture; for a more effective solution, use unified marketing measurement.</p>
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Supplemental Material

Survey Methodology

Forrester's Q1 2018 Global Adtech And Martech For B2C Marketers Tech Tide™ Online Survey was fielded to 204 Forrester contacts with knowledge of B2C marketing. For quality assurance, we screened respondents to ensure they met minimum standards in terms of content knowledge.

Forrester fielded the survey from February to March, 2018. Respondent incentives included a complimentary copy of the resulting reports. Exact sample sizes are provided in this report on a question-by-question basis.

This survey used a self-selected group of respondents with knowledge of B2C marketing and is therefore not random. 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 not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

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Companies Surveyed 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.

[24]7.ai	Ketchup Loyalty
3Q Digital	Kimberly-Clark
4C	Klear
AdRoll	LeadsRx
Allant Group	MediaMath
Amobee	mParticle
Ansira	Numberly
Baylor Scott & White Health	Ometria
BlueVenn	Optimove
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Contently	PricewaterhouseCoopers
Criteo	RedPoint Global
CX Disruptors	Samsung
DemandBridge	SAP
EDC Gruppen	SapientRazorfish
Genpact	SAS
Georgia State University	SendGrid
Idio	Social Media Link
Influitive	TIBCO Software
IRI	Treasure Data
Janrain	Wedea

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Endnotes

- ¹ See the Forrester report "[The Rise Of The Empowered Customer.](#)"
- ² Source: Scott Brinker, "Marketing Technology Landscape Supergraphic (2017): Martech 5000," Chief Marketing Technologist Blog, May 10, 2017 (<http://chiefmartec.com/2017/05/marketing-technology-landscape-supergraphic-2017/>).
- ³ Source: Joe Stanhope, "The CDP Paradox: A Chaotic Category Aspires To Address A Chaotic Challenge," Forrester Blogs, March 8, 2018 (<https://go.forrester.com/blogs/thecdpparadox/>).
- ⁴ See the Forrester report "[Brief: Be Cool, Not Creepy.](#)"
- ⁵ See the Forrester report "[Q&A: What Global Marketers Need To Know About European Privacy Laws.](#)"
- ⁶ Across 32 customer references that Forrester surveyed for "The Forrester Wave™: Cross-Channel Campaign Management, Q1 2018," the average number of channels these customers address with their CCCM solution was 6.5. When asked to indicate how they currently use or plan to use their CCCM solution to support delivery of customer experiences, messages, offers, or content via the listed channels, over 40% indicated they currently support, or plan to support within 24 months, 14 different digital and offline channels. See the Forrester report "[The Forrester Wave™: Cross-Channel Campaign Management, Q1 2018](#)" and Forrester's Q4 2017 Global Cross-Channel Campaign Management Forrester Wave™ Customer Reference Online Survey.
- ⁷ See the Forrester report "[Consumer Data: Beyond First And Third Party.](#)"
- ⁸ See the Forrester report "[Vendor Landscape: Marketing Resource Management.](#)"
- ⁹ See the Forrester report "[The Forrester Wave™: Real-Time Interaction Management, Q2 2017.](#)"
- ¹⁰ See the Forrester report "[The Power Of Customer Context.](#)"
- ¹¹ See the Forrester report "[Accelerate Modern Marketing With Real-Time Interaction Management.](#)"
- ¹² See the Forrester report "[The Forrester Wave™: Digital Intelligence Platforms, Q2 2017](#)" and Forrester's Q2 2017 Global Digital Intelligence Platforms Forrester Wave™ Customer Reference Online Survey.
- ¹³ See the Forrester report "[The Next Chapter For Email Marketing.](#)"
- ¹⁴ This broad and complex feature set includes the ability to manage customer data; perform customer analytics; orchestrate and deliver campaigns, advertising, and interactions; manage marketing resources and content; and measure marketing performance for ongoing optimization.
- ¹⁵ See the Forrester report "[Vendor Landscape: Social Marketing Technology.](#)"
- ¹⁶ Source: "Nielsen Agrees to Acquire Visual IQ," Nielsen press release, September 27, 2017 (<http://www.nielsen.com/us/en/press-room/2017/nielsen-agrees-to-acquire-visual-iq.html>).

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