

The Forrester Wave™: Digital Intelligence Platforms, Q2 2017

The Emerging Leaders Differentiate On Optimization Capabilities

by James McCormick

April 4, 2017

Why Read This Report

In our 26-criteria evaluation of digital intelligence (DI) platform providers, we identified the 10 most significant ones — Adobe, Cxense, Evergage, Google, IBM, Localytics, Mixpanel, Optimizely, SAS, and Webtrekk — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights (CI) professionals make the right choice.

Key Takeaways

Ten Top Vendors Compete In A New And Rapidly Developing Marketing

Forrester's research uncovered a market in which Adobe leads the pack and Evergage, IBM, and SAS follow closely behind. Google, Localytics, Mixpanel, Optimizely, and Webtrekk offer competitive options, while Cxense has a developing solution that shows great promise.

CI Pros Are Looking For A Platform To Optimize All Digital Experiences

The DI platform market is growing because more CI pros see DI as a way to unify the understanding of customer digital interactions and to deliver consistent, continually improving experiences. Additionally, CI pros increasingly trust the platform providers to act as strategic partners, bringing together digital data, analytics, and customer engagement optimization technologies.

Engagement Optimization Capabilities Are Key Differentiators

Vendors differentiate themselves by their supporting services and market size as well as by their digital data management and analytics capabilities. However, we see the biggest differentiation in digital engagement optimization capabilities for behavioral targeting and online testing.

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April 4, 2017

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Related Research Documents

- [Optimize Customer Experiences With Digital Intelligence](#)
- [TechRadar™: Digital Intelligence, Q2 2016](#)
- [Vendor Landscape: Digital Intelligence Technology Providers You Should Care About](#)

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Digital Intelligence Has Started To Consolidate Around Platforms

Businesses are in a race to digitally transform. The way customers engage is rapidly and digitally changing along with their increasing expectations that they get what they want in their moment of need. To meet and exceed these expectations, CI pros need digital intelligence:

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.¹

But the habit of piecemeal purchasing of digital analytics and optimization technologies in isolation for use by different teams (e.g., marketing, product management, and customer support) stymies attempts to track and keep up with the customer at scale across all digital touchpoints. Enterprises and their vendors are now starting the move toward consolidated technology platforms as:

- › **Enterprises are taking a top-down approach to digital intelligence.** Over 90% of reference customers surveyed as part of this Forrester Wave agree that they now have executive-level support for DI, including endorsements for the investment and changes needed to scale across the enterprise (see Figure 1). In advanced practices, this support is codified within digital transformation strategies, and overall it is paying off: On average, the practices of each reference customer used about 10 DI capabilities out of the 15 we selected to compare vendors (see Figure 2).²
- › **Vendors are forming platforms through acquisitions and integration.** In Forrester's recent landscape survey of technology vendors offering some form of DI capabilities, almost three quarters of them (74%) offered two or more of the 15 DI technologies assessed in this report.³ For vendors evaluated in this Forrester Wave — with a tighter focus on DI — the average number of DI capabilities offered shoots up to 11.5. These technologies are starting to metamorphose into consolidated platforms as large incumbent vendors acquire and integrate DI technologies and as smaller vendors build multiple capabilities pre-integrated with a common customer data platform.

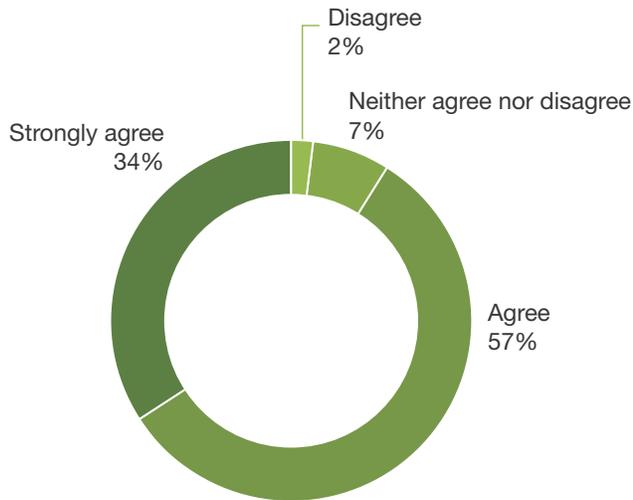
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FIGURE 1 Enterprises Now Have Executive-Level Support For Digital Intelligence

“My organization has executive-level support for digital intelligence, including endorsement for the necessary organizational, process, and technology commitments and change.”

(Respondents were asked, “To what extent do you agree with above statement regarding your organization and its digital intelligence approach and practice?”)

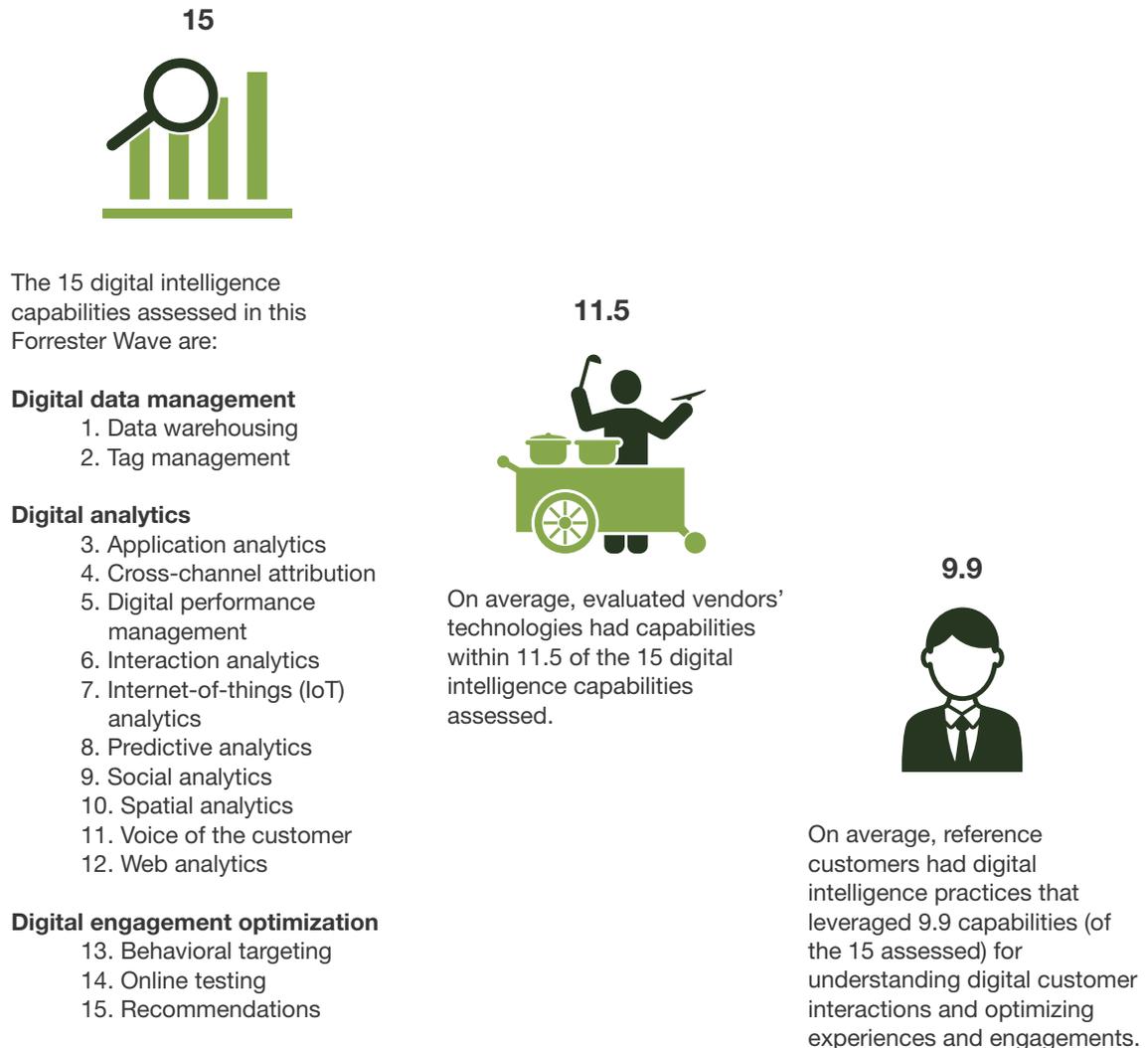


Base: 44 digital intelligence technology decision makers and users

Source: Forrester’s Q2 2017 Global Digital Intelligence Platforms Forrester Wave™ Customer Reference Online Survey

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FIGURE 2 Evaluated Vendors And Their Customers Offer And Leverage Most Digital Intelligence Capabilities

Source: Forrester's Q2 2017 Global Digital Intelligence Platforms Forrester Wave™ Customer Reference Online Survey

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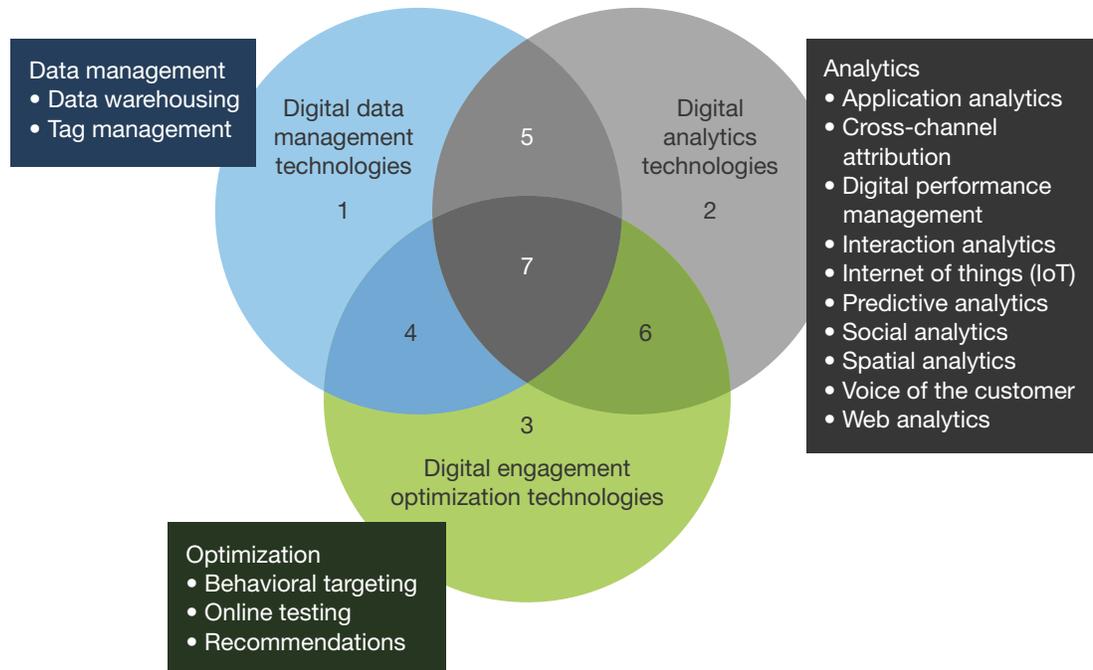
Three Numbers Plot The Digital Intelligence Landscape

Two decades ago, methods for understanding and optimizing digital interactions were restricted to reviewing weblog files and email open rates. Web analytics solutions then prevailed, allowing digital marketers and eCommerce folk to review and analyze browser behaviors for opportunities to increase website conversions. The growth of digital engagement beyond owned websites to channels such as social, mobile, and more recently the internet of things (IoT) has pressured vendors to rapidly and continually evolve these early offerings. A multitude of solutions is now proliferating to service a greater spectrum of digital data, analytics, and engagement optimization needs.⁴ Even so, large incumbent vendors have struggled to keep up with all of the market requirements, leaving gaping holes that technology startups have been happy to try to fill and innovate within. The result is a rapidly transforming DI vendor landscape that is tough to interpret. To sharpen the understanding of the DI platform landscape, Forrester reads the market in terms of three numbers (see Figure 3):⁵

- › **Three tiers of DI technologies that complete the platform.** A complete DI platform consists of three broad DI technology capabilities.⁶ At the base is the digital data management tier for collecting, standardizing, and managing digital customer interaction data and merging it with other relevant data for consumption by the other DI tiers. Digital analytics tech makes up the middle tier. This is where many different types of insights are generated that drive the decisioning and automation found in the top tier. The digital engagement optimization tier is where technologies for continuously optimizing customer experiences, business decisions, and actions for digital customer engagement reside.
- › **Fifteen DI technologies that firms commonly use.** Forrester has identified and defined commonly used DI technologies that this report uses to assess and compare vendors.⁷ These technologies include digital data management technologies, such as those for data warehousing and tag management; digital analytics technologies, such as those for application analytics, cross-channel attribution, digital performance management, interaction analytics, IoT analytics, predictive analytics, social analytics, spatial analytics, voice-of-the-customer, and web analytics; and digital engagement optimization technologies, such as those for behavioral targeting, online testing, and recommendations.
- › **Seven categories of DI vendors that service the market.** Forrester classifies DI vendors based on the level of capability offered within one or more of the three DI technology tiers. Technology vendors that offer advanced capabilities within only one of the DI tiers fall within categories 1, 2, or 3. Those that offer the same level of capabilities but within two tiers fall within categories 4, 5, or 6. And we deem those that offer advanced capabilities across all three tiers category 7 vendors.

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FIGURE 3 Three Digital Intelligence Tiers Made Of 15 Capabilities Define Seven Vendor Categories



The Digital Intelligence Platform Evaluation Overview

To assess the state of the DI platform market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of 10 top vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of 26 evaluation criteria, which we grouped into three high-level buckets:

- › **Current offering.** The vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current DI platform offering. Within a category of digital data management, we evaluated criteria for data warehousing and tag management. Within a category of digital analytics, we evaluated criteria for application analytics, cross-channel attribution, digital performance management, interaction analytics, IoT analytics, predictive analytics, social analytics, spatial analytics, voice of the customer, and web analytics. Within the category of digital engagement optimization, we evaluated criteria for behavioral targeting, online testing, and recommendations. We also evaluated criteria for DI user experience (UX) and third-party DI integrations.
- › **Strategy.** A vendor's position on the horizontal axis indicates the strength of its strategy. Criteria we evaluated included the vendor's product vision, business technology (BT) vision, execution road map, performance, supporting services, and partner ecosystem.

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- › **Market presence.** The size of a vendor's bubble on the chart indicates its market presence. Criteria we evaluated included the vendor's DI revenue, number of enterprise customers, and average deal size.

Evaluated Vendors And Inclusion Criteria

Forrester included 10 vendors in the assessment: Adobe, Cxense, Evergage, Google, IBM, Localytics, Mixpanel, Optimizely, SAS, and Webtrekk. Each of these vendors has (see Figure 4):

- › **Sizable DI enterprise businesses.** Participating vendors clearly demonstrated a growing DI software business, with current annual revenues from enterprise customers at \$10 million or more.
- › **Advanced core DI capabilities.** Participating vendors directly own and develop their own software for at least one of either mobile or web analytics, and they provide advanced capabilities in the respective area.
- › **Advanced DI optimization capabilities.** We considered only vendors that directly own and develop their own software for at least one of the following: online testing, behavioral targeting, or recommendations. Furthermore, the vendor's software must deliver advanced capabilities in the respective area.

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FIGURE 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Adobe	Adobe Analytics Standard Adobe Analytics Standard — Mobile Apps Adobe Analytics Standard — Video Adobe Analytics Premium — Customer 360 Adobe Analytics Premium — Predictive Intelligence Adobe Analytics Premium — Attribution Adobe Analytics Premium — Complete Adobe Target Premium Adobe Activation Core Service Adobe Mobile Core Service Adobe Places Core Service		Fall 2016 release
Cxense	Cxense DMP Cxense Content Cxense Insight Cxense Maxifier Cxense Video		Current
Evergage	Evergage Core Evergage for Mobile Apps Evergage 1		
Google	Google Analytics 360 Google Tag Manager 360 Google Optimize 360 Google Attribution 360 Google Surveys 360 Google Data Studio 360 (in beta) DoubleClick Bid Manager Google BigQuery		
IBM	IBM Watson Customer Experience Analytics IBM Application Performance Management IBM Watson IoT Platform IBM Predictive Customer Intelligence IBM Watson Analytics for Social Media IBM Marketing Cloud IBM Interact IBM Digital Recommendations	8.1.3.1 1.1.1 16.4 10	
Localytics	Localytics mobile engagement platform Localytics Predictions	SDK 4.1 2.0	
Mixpanel	Mixpanel		

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FIGURE 4 Evaluated Vendors: Product Information And Selection Criteria (Cont.)

Vendor	Product evaluated	Product version evaluated	Version release date
Optimizely	Optimizely X Web Experimentation Optimizely X Personalization Optimizely X Recommendations Optimizely X Full Stack Optimizely X Mobile Optimizely X OTT (Over-The-Top) Optimizely Classic		
SAS	SAS Customer Intelligence 360 SAS Analytics for IoT SAS Text Analytics SAS Enterprise Miner SAS Visual Analytics SAS Real-time Decision Manager SAS Model Manager	4.2 14.2 14.2 7.3 6.5 14.2	
Webtrekk	Webtrekk Suite Webtrekk Analytics Webtrekk DMP Webtrekk Marketing Automation Webtrekk App Analytics		

Vendor inclusion criteria

The size and growth of the digital intelligence business (in terms of annual revenue) for enterprise customers. We considered only vendors clearly demonstrating a growing digital intelligence software business of \$10 million or greater.

The level of functionality provided via the core digital intelligence technologies of mobile and web analytics technology. We considered only vendors that directly own and develop their own software for at least one of these digital intelligence technologies. Furthermore, the vendor's software must deliver advanced capabilities within the respective area.

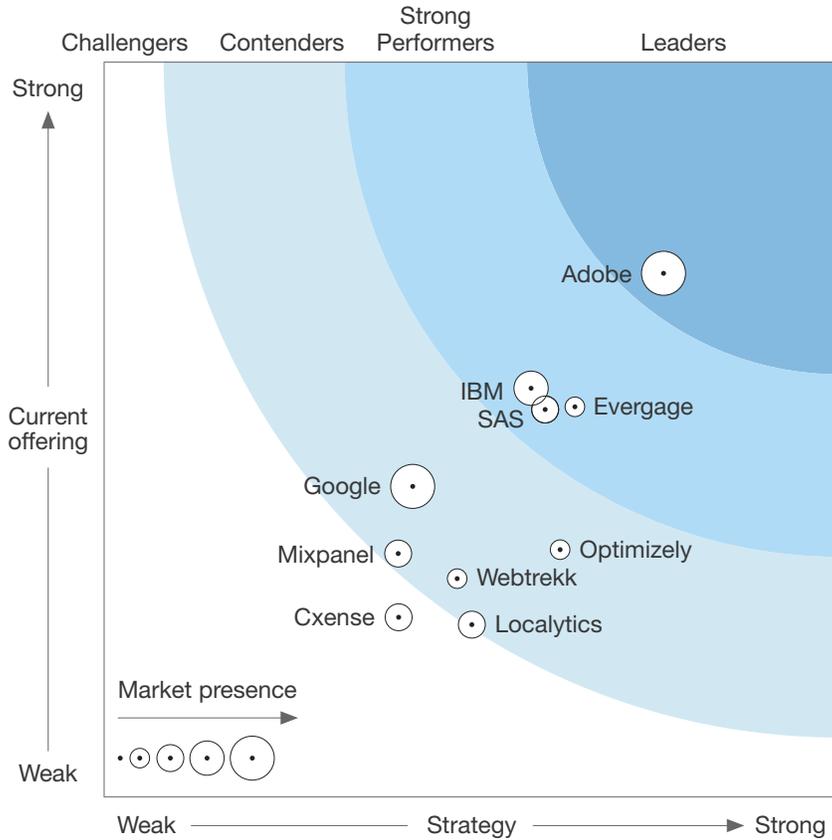
The level of functionality provided via online testing, behavioral targeting, and/or recommendation software. These are digital intelligence technologies that Forrester's research has shown currently deliver significant business value to enterprise firms. Only vendors that directly own and develop their own software for at least one of these digital intelligence technologies were considered. Furthermore, the vendor's software must deliver advanced capabilities within the respective area.

Vendor Profiles

This evaluation of the DI platform market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 5).

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FIGURE 5 Forrester Wave™: Digital Intelligence Platforms, Q2 '17



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 The Forrester Wave™
 Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

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FIGURE 5 Forrester Wave™: Digital Intelligence Platforms, Q2 '17 (Cont.)

	Forrester's weighting	Adobe	Cxense	Evergage	Google	IBM	Localytics	Mixpanel	Optimizely	SAS	Webtrekk
Current Offering	50%	3.56	1.22	2.65	2.11	2.78	1.17	1.65	1.68	2.63	1.48
Digital data management	15%	3.00	0.50	0.50	3.00	2.00	0.50	0.50	0.50	1.50	0.50
Digital analytics	30%	3.40	0.65	1.60	2.05	3.15	1.25	0.85	0.70	2.50	1.25
Digital engagement optimization	15%	4.60	1.00	4.60	1.60	2.20	0.80	0.80	2.60	3.00	0.20
Digital intelligence user experience	20%	3.00	1.00	4.00	2.00	2.00	1.00	3.00	3.00	2.00	3.00
Third-party digital intelligence integrations	20%	4.00	3.00	3.00	2.00	4.00	2.00	3.00	2.00	4.00	2.00
Strategy	50%	3.80	2.00	3.20	2.10	2.90	2.50	2.00	3.10	3.00	2.40
Product vision	20%	4.00	2.00	3.00	2.00	4.00	2.00	2.00	2.00	3.00	2.00
Business technology (BT) vision	10%	3.00	2.00	3.00	2.00	3.00	3.00	2.00	3.00	3.00	2.00
Execution road map	10%	3.00	2.00	3.00	3.00	2.00	2.00	2.00	2.00	3.00	2.00
Performance	20%	3.00	1.00	3.00	3.00	1.00	3.00	1.00	3.00	3.00	3.00
Supporting services	20%	4.00	2.00	4.00	1.00	3.00	2.00	2.00	4.00	2.00	2.00
Partner ecosystem	20%	5.00	3.00	3.00	2.00	4.00	3.00	3.00	4.00	4.00	3.00
Market Presence	0%	4.60	2.70	1.80	4.60	3.70	2.40	2.60	2.00	3.00	1.70
Digital intelligence revenue	30%	5.00	2.00	1.00	5.00	4.00	2.00	3.00	3.00	3.00	1.00
Number of enterprise customers	30%	5.00	3.00	1.00	5.00	3.00	2.00	3.00	1.00	3.00	2.00
Average deal size	40%	4.00	3.00	3.00	4.00	4.00	3.00	2.00	2.00	3.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Adobe Is A Leader

- › **Adobe consolidates a broad set of capabilities around core platform services.** Adobe continues to have strength and depth in digital intelligence, primarily for optimizing customer experiences and engagement, all within the framework of its marketing cloud platform in a marketing and eCommerce context. Adobe must try not to be a victim of its own success and make sure that much of its customer base is not left behind on legacy systems as it modernizes

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its DI stack. Looking forward, the vendor aims to continue to entice and extend its customer base through partnerships with Microsoft Azure (to strengthen its appeal to enterprise sales teams) and Adobe Sensei (to focus its AI efforts on scaling customer experiences).

Evergage, IBM, And SAS Are Strong Performers

- › **Evergage offers an integrated platform of DI capabilities.** Evergage's strengths in customer profile management, analytics, and optimization help customers personalize experiences across digital touchpoints. Its analytics and reporting features provide good support for tracking customer web and mobile engagement and for managing optimization efforts (testing and targeting). Marketing and eCommerce teams are the predominate buyers, yet the vendor is keen to appeal to other enterprise functions. Doing so requires Evergage to broaden its DI capabilities. The firm intends to make its personalization functionality relevant across more digital touchpoint types. Going forward, it will concentrate efforts on machine learning, predictive analytics, and IoT initiatives.
- › **IBM embeds analytics within its customer engagement platform.** Data and analytics capabilities sit within a services layer supporting optimization within marketing, commerce, and supply chain functional verticals, and they are also available as a standalone offering. IBM has strength and technical depth as well as breadth in analytics capabilities. However, these are dispersed across digital analytics, journey analytics, and behavior analytics modules. To build on its strength, IBM must solidify its product marketing strategy and implement plans to consolidate its analytics capabilities. It must make optimization capabilities (e.g., testing and targeting) a core service that supports multiple enterprise functions. Going forward, IBM will also continue to embed Watson cognitive (AI) functions with those of the customer engagement platform.
- › **SAS pivots digital intelligence around its customer analytics module.** At the heart of its DI offering lies a customer analytics module — SAS Customer Intelligence 360. SAS rounds off its DI capabilities by the addition of separate bolt-on-modules for real-time decisioning, text analysis, data mining, data visualization, and IoT analytics. Together, these provide some functionality in most of the DI capabilities we assessed. The offering will appeal to SAS's tradition analytics customers; however, the company must package the DI solution to appeal to buyers who don't want to integrate multiple applications from one vendor. SAS's DI product road map focuses on increasing the sophistication of its customer analytics solutions.

Optimizely, Google, Webtrekk, Localytics, And Mixpanel Are Contenders

- › **Optimizely extends and consolidates DI optimization approaches.** The launch of the Optimizely X platform expands the vendor's capabilities beyond website testing to include personalization and recommendations across email, apps, and connected devices. The platform provides an integrated UX that business users across the enterprise will find empowering. As the vendor's current efforts and future vision are hyperfocused on optimization, it must continue to maintain an

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open architecture and work closely with key third-party DI vendors to ensure easy integration to maintain its relevance with DI buyers. Notable road map features include continuous optimization automation, enterprise program management, and compliance and privacy.

- › **Google consolidates capabilities to support ad and search marketing.** 2016 saw the launch of Google's Analytics 360 Suite, which integrated, built on, and extended the company's analytics, attribution, tag management, and online testing capabilities. The suite is compelling for optimizing ad and search marketing, given its native integrations with Google's AdWords and DoubleClick. For more advanced data management, native integrations exist between the suite and Google BigQuery. The lack of advanced user management capacities and Google's approach to customer support are two areas that the company must improve to elevate its relevance among DI enterprise buyers. Road map items currently in beta are a data management platform (DMP) and business intelligence models.
- › **Webtrekk's DI suite optimizes marketing efforts.** The suite is made up of different modules, including those for DMP, web analytics, app analytics, and marketing automation. This combination allows customers to bring together offline and online data to track and analyze customer interactions, target ads and content, and measure the performance of marketing campaigns in websites, apps, and social platforms. On top of that, the suite allows customers to have full ownership and control of their data. While at least some functionality exists for over half of the DI capabilities assessed, the suite's appeal will be limited to digital marketing use cases. Looking ahead, expect Webtrekk to continue work on enhancing the user interface.
- › **Localytics provides advanced analytics for mobile optimization.** The vendor's mobile predictions module, combined with its mobile engagement platform, allows businesses to optimize mobile apps and messaging and measure the impact of targeting and mobile marketing campaigns. While it has clear strengths in mobile intelligence, Localytics must broaden its data, analytics, and optimization capabilities for the other digital channel types in order to be more attractive to DI budgets. In the short term, the vendor will focus on enhancing its current mobile functionality and building enterprise-relevant extensibility and security. The company's road map also includes plans for marketing automation and expanded support for other channels.
- › **Mixpanel's platform combines insights, predictive analytics, and experimentation.** The solution is driven by a customer-centric data model, and it is designed for scalability and speedy data processing for user journey and customer experience analytics and optimization. Although the solution is touchpoint-agnostic, its strengths will appeal to mobile-first businesses. It also has cross-functional relevance for product managers and marketers. Mixpanel has at least some coverage for most of the DI capabilities we assessed. To increase its DI platform credentials, the vendor must develop some of these capabilities to best-of-breed status. The road map shows that Mixpanel is doubling down on support for enterprise buyers, greater investment in reporting, and functionality for nonmobile touchpoints.

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Cxense Is A Challenger

- › **Cxense's technology delivers actionable audience data management and analysis.** The vendor's platform ingests interaction data, builds users profiles, and allocates customers to segments in subsecond time. Its purpose is for targeting ads and content within digital channels such as email, web, and apps. The strength of Cxense's solution is its ability to marry offline data with digital interaction data to help marketers track and segment customers and measure marketing activities. The vendor's platform offers good coverage, providing functionality for 10 of the 15 DI capabilities we assessed. Going forward, customers can expect to see increased maturity across many of these capabilities. Specifically the vendor's product road map promises functionality such as out-of-the-box website and app personalization.

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Supplemental Material

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by January 6, 2017.

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria.
- › **Executive briefings.** An executive backed by a product team from each vendor presented and answered questions on the vendor's product strategy and market sizing.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality and to answer clarification questions posed to them. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer surveys and reference calls.** To validate product and vendor qualifications, Forrester also surveyed and conducted phone interviews with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and

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market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Survey Methodology

Forrester fielded its Q2 2017 Global Digital Intelligence Platforms Forrester Wave™ Customer Reference Online Survey to 44 individuals who were current clients of the vendors included in “The Forrester Wave™: Digital Intelligence Platforms, Q2 2017.” We asked each vendor to supply at least three customers. For quality assurance, we required all respondents to provide contact information and answer basic questions about their firms’ revenues and budgets. Forrester fielded the survey between January and February 2017.

Exact sample sizes are provided in this report on a question-by-question basis. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. During this research, Forrester questioned end users about the features and state of their DI practices. We also asked about the value that DI approaches are currently providing and their intentions to mature such approaches to attain greater value in their respective firms. This research was intended to generate a qualitative understanding of the state of continuous optimization.

Endnotes

- ¹ Forrester formally defines the term digital intelligence within the vision report of the digital intelligence playbook. See the Forrester report “[Optimize Customer Experiences With Digital Intelligence](#).”
- ² Forrester has been tracking digital analytics and optimization technologies closely for a number of years and has identified and defined the 15 commonly used digital intelligence technologies referenced in this report. See the Forrester report “[TechRadar™: Digital Intelligence, Q2 2016](#).”
- ³ See the Forrester report “[Vendor Landscape: Digital Intelligence Technology Providers You Should Care About](#).”
- ⁴ Forrester has identified over 200 vendors that offer some form of DI solutions, 117 of which Forrester has placed within one of seven DI categories. See the Forrester report “[Vendor Landscape: Digital Intelligence Technology Providers You Should Care About](#).”
- ⁵ See the Forrester report “[Vendor Landscape: Digital Intelligence Technology Providers You Should Care About](#).”
- ⁶ For more information on the DI three-tier architecture, see the Forrester report “[TechRadar™: Digital Intelligence, Q2 2016](#).”
- ⁷ Forrester describes and defines 15 DI technologies in its digital intelligence TechRadar report. See the Forrester report “[TechRadar™: Digital Intelligence, Q2 2016](#).”

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