LANDSCAPE REPORT

Now Tech: Digital Intelligence Technologies, Q2 2021

Tools And Technology: The Digital Intelligence Playbook

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Summary

Digital intelligence (DI) solutions allow firms to collect, integrate, and manage digital customer interaction data; process and analyze data to generate actional insights; and automate the continuous improvement of digital experiences. We've identified five functional segments in the DI technology provider market, each with varying capabilities: 1) engagement data hubs; 2) digital analytics; 3) experience optimization; 4) digital intelligence platforms; and 5) product intelligence. Customer insights (CI) pros should use this report to understand the value they can expect from a DI tech provider and to select one based on size and functionality.

TRANSFORM DIGITAL ENGAGEMENT AT SCALE WITH DIGITAL INTELLIGENCE

Firms have evolved beyond traditional digital channels of customer engagement and are now engaging via newly connected devices, kiosks, and physical locations. Many have also moved beyond marketing campaigns and now include the delivery of products, services, and support as reasons for digital engagement. To guide this transformation and scale intelligent engagements, they rely on digital data, analytics, and experience optimization technologies. In response, tech vendors are developing new and sophisticated data, analytics, and experience optimization products. Forrester calls this category digital intelligence (DI), which we define as:

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

Forrester's research into advanced data and analytics practices show that firms with a top-down integrated approach gain a **competitive advantage** over those with multiple isolated practices. By prioritizing and integrating their data, analytics, and experience optimization technologies, they create a digital intelligence platform on which to build and scale differentiating experiences. Specifically, these firms have shown that those who invest strategically in digital intelligence technology can expect to:

- **Create a holistic view of data for digital customer engagement.** DI data technologies can break down the customer interaction data silos between various departmental applications. Leading vendors build products that can support enterprise data platforms and sustain omnichannel data layers of digital customer interaction accessible at near-real-time velocities.

- **Understand engagement with a comprehensive set of digital analytics techniques.** The growth in digital engagement analytics methods has increased the opportunities to understand customer interactions in different ways. Vendor offerings embrace this diversity by combining analysis techniques, such as those for web, app, the internet of things, and social media.

- **Automate continuous experience improvement processes.** DI technologies use data, analytics, experimentation, and AI to guide the delivery of digital experiences in a closed-loop way that continuously improves digital customer engagements.

They can do this at the scales necessary to boost your firm's ability to win, retain, and grow your customers and revenue.
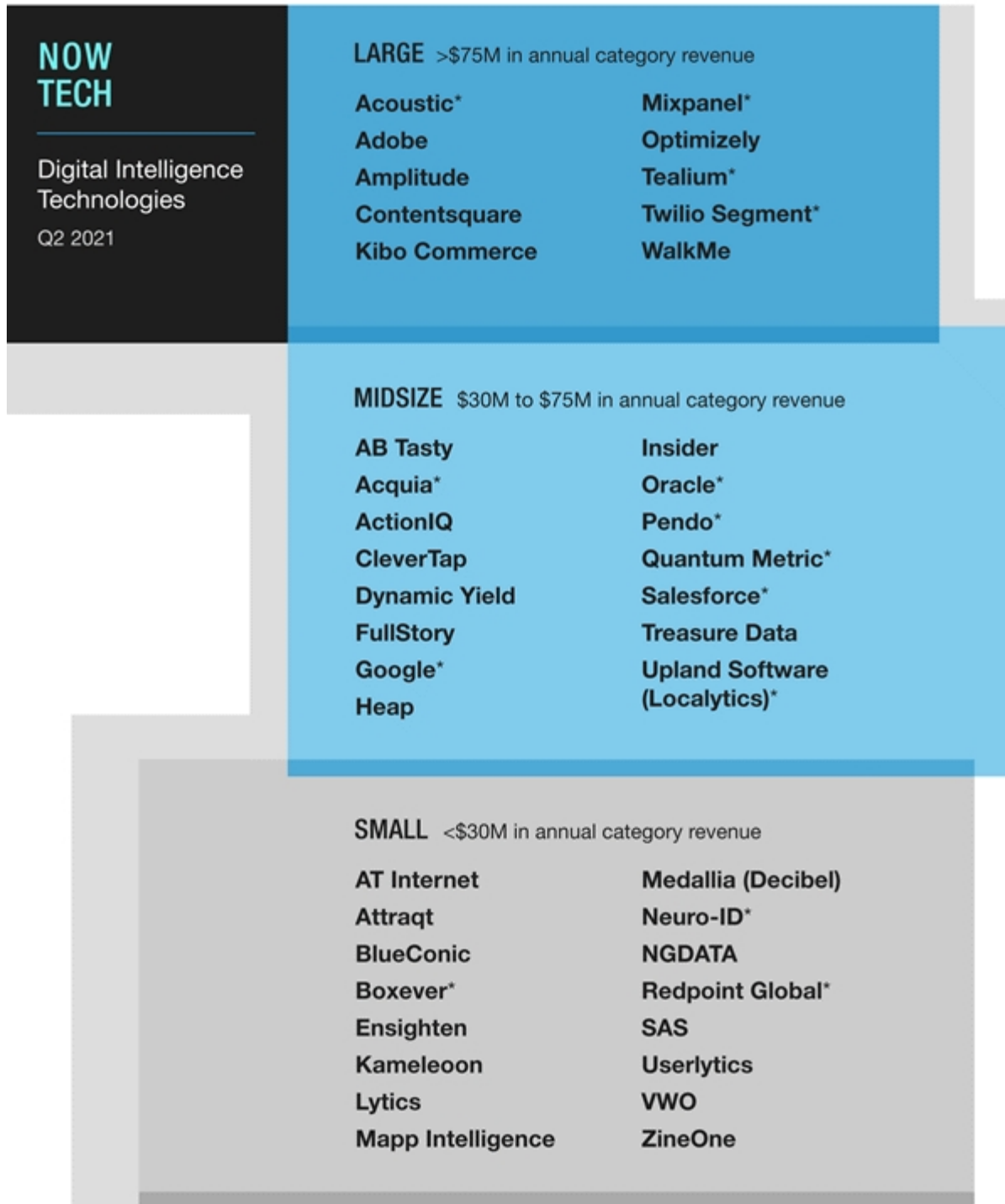
SELECT VENDORS BASED ON SIZE AND FUNCTIONALITY

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 annual digital intelligence revenue: large established players (more than $75 million in digital intelligence revenue), midsize players ($30 million to $75 million in revenue), and smaller players (less than $30 million in revenue) (see Figure 1). We did not include vendors that we estimated to have less than $3 million in annual category revenue.

Figure 1: Now Tech Market Presence Segments: Digital Intelligence
Technologies, Q2 2021

NOW TECH

Digital Intelligence Technologies

Q2 2021

LARGE >$75M in annual category revenue

Acoustic*
Adobe
Amplitude
Contentsquare
Kibo Commerce

Mixpanel*
Optimizely
Tealium*
Twilio Segment*
WalkMe

MIDSIZE $30M to $75M in annual category revenue

AB Tasty
Acquia*
ActionIQ
CleverTap
Dynamic Yield
FullStory
Google*
Heap

Insider
Oracle*
Pendo*
Quantum Metric*
Salesforce*
Treasure Data
Upland Software (Localytics)*

SMALL <$30M in annual category revenue

AT Internet
Attraqt
BlueConic
Boxever*
Ensighten
Kameleoon
Lytics
Mapp Intelligence

Medallia (Decibel)
Neuro-ID*
NGDATA
Redpoint Global*
SAS
Userlytics
VWO
ZineOne

*Forrester estimate

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Digital Intelligence Technology Product Segments

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

- **Engagement data hubs collect, manage, and distribute digital customer data.** 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 encapsulates vendors that offer other solutions, such as customer data platforms, data management platforms, data warehouses, or tag management systems.

- **Digital analytics technology tracks, analyzes, and reports on digital engagements.** This technology does so within and across an increasing number of digital touchpoint types (e.g., browsers, apps, and connected devices). 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 describing visitor interactions; and for optimizing application and campaign performance.

- **Experience optimization uses experimentation, rules, and AI to optimize experiences.** With these capabilities, users can dynamically evolve and deliver optimized experiences to their customers at scales that significantly improve the value firms give to and receive from their online customers. 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 offer a full stack of integrated functionality.** As well as being able to persist, model, and analyze engagement data, these platforms have capabilities such as A/B/n testing and personalization functionality that can be applied to multiple digital touchpoint types (e.g., browser and apps). Vendors in this segment are usually either large incumbents that have built, acquired, and then merged multiple components of the DI stack or smaller vendors that specialize in applying DI to marketing, mobile, or product delivery.

- **Product intelligence platforms support the needs of digital product delivery teams.** These platform offerings have full-stack data, analytics, and experience optimization capabilities similar to those of digital intelligence platforms. However, Forrester calls them out separately for their specialized support for a large and growing cohort of teams with specific product intelligence needs, such as in-product guidance, feature rollout and targeting, and product engagement KPIs. Many of these capabilities are different from those expected by the marketing and commerce teams that have been the traditional users of digital intelligence platforms.

Figure 2: Now Tech Functionality Segments: Digital Intelligence Technologies, Q2 2021, Part 1

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

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

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Figure 3: Now Tech Functionality Segments: Digital Intelligence Technologies, Q2 2021, Part 2

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

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

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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 2021

LARGE >$75M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Acoustic	Digital intelligence platform	NA 75%; LATAM 4%; EMEA 15%; APAC 6%	Retail; financial services; travel	PayPal; Roots; Sprint
Adobe	Digital analytics; digital intelligence platform; experience optimization	NA 56%; LATAM 2%; EMEA 26%; APAC 16%	Media, entertainment, and leisure; retail and wholesale; financial services and insurance	The Home Depot; Sprint; TUI
Amplitude	Digital analytics; digital intelligence platform; product intelligence	NA 68%; LATAM 3%; EMEA 21%; APAC 8%	Consumer tech; e-commerce and marketplaces; B2B	Cisco; NBCUniversal; PayPal
Contentsquare	Digital analytics	NA 50%; LATAM 2%; EMEA 45%; APAC 3%	Retail and e-commerce; financial services; travel and telecom	Dell; IKEA; T-Mobile
Kibo Commerce	Experience optimization	NA 70%; LATAM 1%; EMEA 25%; APAC 4%	B2C retail; travel and hospitality; B2B retail	Adidas; Dunkin'; Office Depot
Mixpanel	Digital analytics; digital intelligence platform; product intelligence	NA 60%; LATAM 5%; EMEA 25%; APAC 10%*	Consumer technology; retail and e-commerce; financial services and insurance*	DocuSign; Expedia; Uber
Optimizely (Episerver)	Experience optimization	NA 43%; EMEA 50%; APAC 5%; other 2%	Retail; financial services; high-tech	Atlassian; IBM; Visa
Tealium	Engagement data hub	NA 50%; LATAM 2%; EMEA 35%; APAC 13%	Retail; financial services; healthcare	Facebook; The Gap; Visa
Twilio Segment	Engagement data hub	NA 50%; LATAM 5%; EMEA 35%; APAC 10%*	Retail; software; financial services	FOX; IBM; Instacart
WalkMe	Product intelligence	NA 73%; EMEA 19%; APAC 8%	Professional services; information; financial	IBM; Sprinklr; Walgreens

			services	

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

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Figure 5: Now Tech Midsize Vendors: Digital Intelligence

Technologies, Q2 2021

MIDSIZE $30M to $75M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
AB Tasty	Experience optimization	NA 20%; LATAM 1%; EMEA 75%; APAC 4%	Fashion and cosmetics; financial services and insurance; high-tech and telecom	Ashley HomeStore; Care.com; Sephora
Acquia	Engagement data hub; experience optimization	NA 64%; LATAM 1%; EMEA 23%; APAC 12%	Retail; travel and hospitality; media and entertainment	Georgia Pacific; lululemon; Panasonic
ActionIQ	Engagement data hub	NA 90%; EMEA 5%; APAC 5%	Retail; media; financial services	Albertsons; Morgan Stanley; The New York Times
CleverTap	Digital intelligence platform	NA 25%; LATAM 15%; EMEA 15%; APAC 45%	Financial technology; e-commerce; media and entertainment	Disney+ Hotstar; The Meet Group; SonyLIV
Dynamic Yield	Experience optimization	NA 42%; LATAM 2%; EMEA 44%; APAC 12%	Retail; finance; iGaming	Build.com; e.l.f. Cosmetics; Sports Direct
FullStory	Digital analytics	NA 86%; LATAM 5%; EMEA 8%; APAC 1%	Retail; software as a service (SaaS); financial services	Lowe's; Peloton; Segment
Google (Google Analytics 360)	Digital analytics; digital intelligence platform; experience optimization	NA 40%; LATAM 10%; EMEA 30%; APAC 20%*	Retail; travel and hospitality; financial services and insurance*	Moncler; Progressive; Transavia
Heap	Digital analytics; product intelligence	NA 85%; LATAM 1%; EMEA 9%; APAC 5%	B2B SaaS; e-commerce; financial services	Casper; Northwestern Mutual; Splunk
Insider	Digital analytics; experience optimization	EMEA 58%; APAC 42%	Retail; travel and airlines; media	Avon; Estée Lauder; Singapore Airlines
Oracle	Digital intelligence	NA 65%; LATAM 3%, EMEA 25%; APAC	Retail; financial services; travel	Kaunet; National

	intelligence platform; experience optimization	EMEA 20%; APAC 7%	services; travel	National Express
Pendo	Product intelligence	NA 87%; EMEA 12%; APAC 1%	Financial services; software; education	Cisco; Coursera; IHS Markit
Quantum Metric	Digital analytics; product intelligence	NA 85%; EMEA 10%; APAC 5%	Retail; travel; telecom	AT&T; The Home Depot; United Airlines
Salesforce	Digital intelligence platform; experience optimization	NA 71%; EMEA 19%; APAC 10%	Retail; financial services; high-tech	Autodesk; Carhartt; Publisher's Clearing House
Treasure Data	Engagement data hub	NA 30%; LATAM 1%; EMEA 9%; APAC 60%	Communications and media; retail and e-commerce; consumer goods	Anheuser- Busch InBev; Subaru; Wish
Upland Software (Localytics)	Digital intelligence platform	NA 70%; LATAM 5%; EMEA 22%; APAC 3%	Nonprofit and government; media, entertainment, and publishing; retail	Cost Plus World Market; HSN; Oxfam

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

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Figure 6: Now Tech Small Vendors: Digital Intelligence
Technologies, Q2 2021

SMALL <$30M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
AT Internet	Digital analytics	NA 10%; EMEA 80%; APAC 10%	Media; e-commerce and classified; banking and insurance	BBC; Crédit Agricole; Deutsche Telekom
Attraqt	Experience optimization	NA 1%; EMEA 94%; APAC 5%	Retail; telecom; media	Auchan; Screwfix; Superdry
BlueConic	Engagement data hub	NA 60%; EMEA 40%	Media and publishing; retail; hospitality and entertainment	Hearst; Heineken USA; VF
Boxever	Digital intelligence platform; experience optimization	NA 10%; LATAM 20%; EMEA 40%; APAC 30%	Travel; financial services; gambling	Allied Irish Banks (AIB); Emirates; Hive
Ensighten	Engagement data hub	NA 63%; EMEA 31%; APAC 6%	Financial services; retail and e-commerce; high-tech	Benenden Health; Japan Airlines; Lacoste
Kameleoon	Experience optimization	NA 10%; EMEA 85%; APAC 5%	Retail and e-commerce; financial services and insurance; healthcare	The Coca-Cola Company; L'Oréal Paris; Toyota
Lytics	Engagement data hub	NA 85%; EMEA 10%; APAC 5%	Consumer packaged goods and retail; media; B2B tech	General Mills; Nestlé; Yamaha
Mapp Intelligence	Digital analytics	NA 3%; EMEA 95%; APAC 2%	Retail and e-commerce; direct-to-consumer; financial services	The Entertainer; Italiaonline; OBI
Medallia (Decibel)	Digital analytics	NA 42%; EMEA 58%	Financial service and insurance; travel and hospitality; retail and e-commerce	Adidas; British Airways; Fidelity
Neuro-ID	Product	NA 80%; EMEA	Financial services	Affirm; Intuit;

	Product intelligence	NA 80%; EMEA 20%*	Financial services and insurance; e-commerce; payments	Affirm; Intuit; Square
NGDATA	Engagement data hub	NA 20%; EMEA 50%; APAC 30%	Financial services and insurance; telecom and media; utilities	Belfius Bank; Standard Chartered Bank; Telenet (Liberty Global)
Redpoint Global	Engagement data hub	NA 70%; LATAM 5%; EMEA 20%; APAC 5%	Retail; healthcare; financial services	1-800 Contacts; The Gap; Kingfisher
SAS	Digital intelligence platform	NA 37%; LATAM 10%; EMEA 43%; APAC 10%	Financial services; telecom; retail	Drogerie Markt; ICA Banken; Telecom Italia
Userlytics	Experience optimization	NA 55%; LATAM 2%; EMEA 33%; APAC 10%	E-commerce; financial services; healthcare	L'Oréal; McKinsey & Company; U.S. Department of Homeland Security
VWO	Digital intelligence platform; experience optimization	NA 55%; LATAM 5%; EMEA 30%; APAC 10%	Online retail and fashion; travel; SaaS and tech	Encyclopedia Britannica; Hilton; Warner Music Group
ZineOne	Experience optimization	NA 80%; APAC 20%	Retail; financial services; telecom	HDFC Bank; Tailored Brands; Wynn Resorts

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

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TAKE A STRATEGIC APPROACH TO YOUR DIGITAL INTELLIGENCE TECHNOLOGY INVESTMENT

Customer insights teams 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.** To achieve the scale and breadth you need to deliver competitive differentiation, you must apply digital

intelligence continuously, across all touchpoints and customer engagement functions, and at high levels of coordination and at the speed necessary to keep up with engaging customers. This requires a top-down strategy that synchronizes teams with a common set of best practices, processes, and integrated DI technologies.

- **Consider ecosystem and integration capabilities when choosing DI tech.** No one product or vendor provides all 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 of, implementation of, and return on 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 digital intelligence, identify strengths and gaps in your current DI technology portfolio relative to your business's digital measurement, analytics, and experience optimization priorities. Your assessment should also include a review of your firm's digital strategy and its supporting organizational structure and people investment. Forrester's DI maturity **measurementmethodology** can help.

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 We 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

- Acoustic

- Acquia

- ActionIQ

- Adobe

- AdTheorent

- Aislelabs

- Algonomy

- Amelia, an IPsoft Company

- Amplitude

- antuit.ai

- AppDynamics

- AT Internet

- Attraqt

- Audiense

- BlueConic

- Brandwatch

- Cadent

- Contentsquare

- Dynamic Yield

- Dynatrace

- Evolv Technologies

- Exponea

- Glassbox

- Hexagon

- Insider

- Kameleoon

- Kibo Commerce

- Lemnisk

- Lytics

- Matomo

- Medallia

- Nabler

- NGDATA

- Optimizely

- Oracle

- Piano

- Quantum Metric

- Qubit

- Redpoint Global

- Reflektion

- Salesforce

- SAS

- Simon Data

- SiteSpect

- Squirro

- Talkwalker

- Tealium

- TransUnion

- Treasure Data

- Upland Software

- VWO

- ZineOne

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