WAVE REPORT

The Forrester Wave™: Digital Intelligence Platforms, Q4 2022

The Nine Providers That Matter Most And How They Stack Up

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Summary

In our 31-criterion evaluation of digital intelligence platform providers, we identified the nine most significant ones — Acoustic, Adobe, Amplitude, Google, Insider, Optimizely, Oracle, Salesforce, and SAS — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights, digital marketing, e-commerce, digital business, data and analytics, and digital customer experience professionals select the right one for their needs.

Additional resources are available in the online version of this report.

Cross-Channel Support, AI, And Data Privacy Are The Main Differentiators

COVID-19 has accelerated consumer adoption of digital channels. According to Forrester's 2022 data, 66% of US online adults now use technology more than ever to engage with companies. In the post-pandemic world, customers expect meaningful and consistent experiences that seamlessly merge digital and physical channels. To retain customers, companies need to track, identify, and analyze customer behaviors across the different digital devices and channels, while also unifying the offline data. They must continuously understand and anticipate how customers' needs change in real time, optimizing experiences while respecting customer data privacy choices. Digital intelligence platforms can help with this and are seeing strong investment. Forrester's Future Fit Survey, 2022, reveals 65% of business and technology professionals said they were expanding their digital intelligence capabilities.

As a result of these trends, digital intelligence platform customers should look for providers that:

- **Support the understanding and optimization of experiences across digital channels.** Companies struggle to understand the human behind the digital user. In Forrester's Data And Analytics Survey, 2022, 21% of data and analytics decision-makers indicated that the lack of a single view of the customer makes it harder to execute visions for data, data management, data science, and analytics. Vendors should support companies in unifying the customers' data across devices and channels with advanced identity resolution techniques or with the ability to create a dashboard with a single view of different digital and device data. They should also help deliver consistent optimized experiences across customers' multichannel journeys.

- **Leverage AI in data management, digital analytics, and experience optimization.** To scale their digital intelligence activities, companies need to use AI/ML techniques extensively. In digital data management, this will enable them to predict behaviors based on the existing data; in digital analytics, to extract meaningful insights faster; and in digital experience optimization, to continuously select the best experience for customers. Vendors should offer basic AI/ML techniques, such as anomaly detection or manual allocation in A/B testing, alongside advanced techniques, such as automatic intelligent analysis or reinforcement learning, for optimized experiences.

- **Offer solutions to data deprecation and pay attention to privacy.** According to Forrester's 2022 data, 62% of US online adults are concerned about their online

behavior being tracked. Third-party data deprecation, the "cookieless" world, and increasing data privacy regulations like the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) aim to protect customers' privacy during their digital interactions. Regardless of their geographic location and operations, vendors should respect data privacy regulations across all geographic regions and offer alternatives to the use of third-party cookies, leveraging zero-, first-, and second-party data.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in our reports on digital intelligence technologies.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figures 1 and 2). Click the link at the beginning of this report on Forrester.com to download the tool.

Figure 1

Forrester Wave™: Digital Intelligence Platforms, Q4 2022

THE FORRESTER WAVE™

Digital Intelligence Platforms
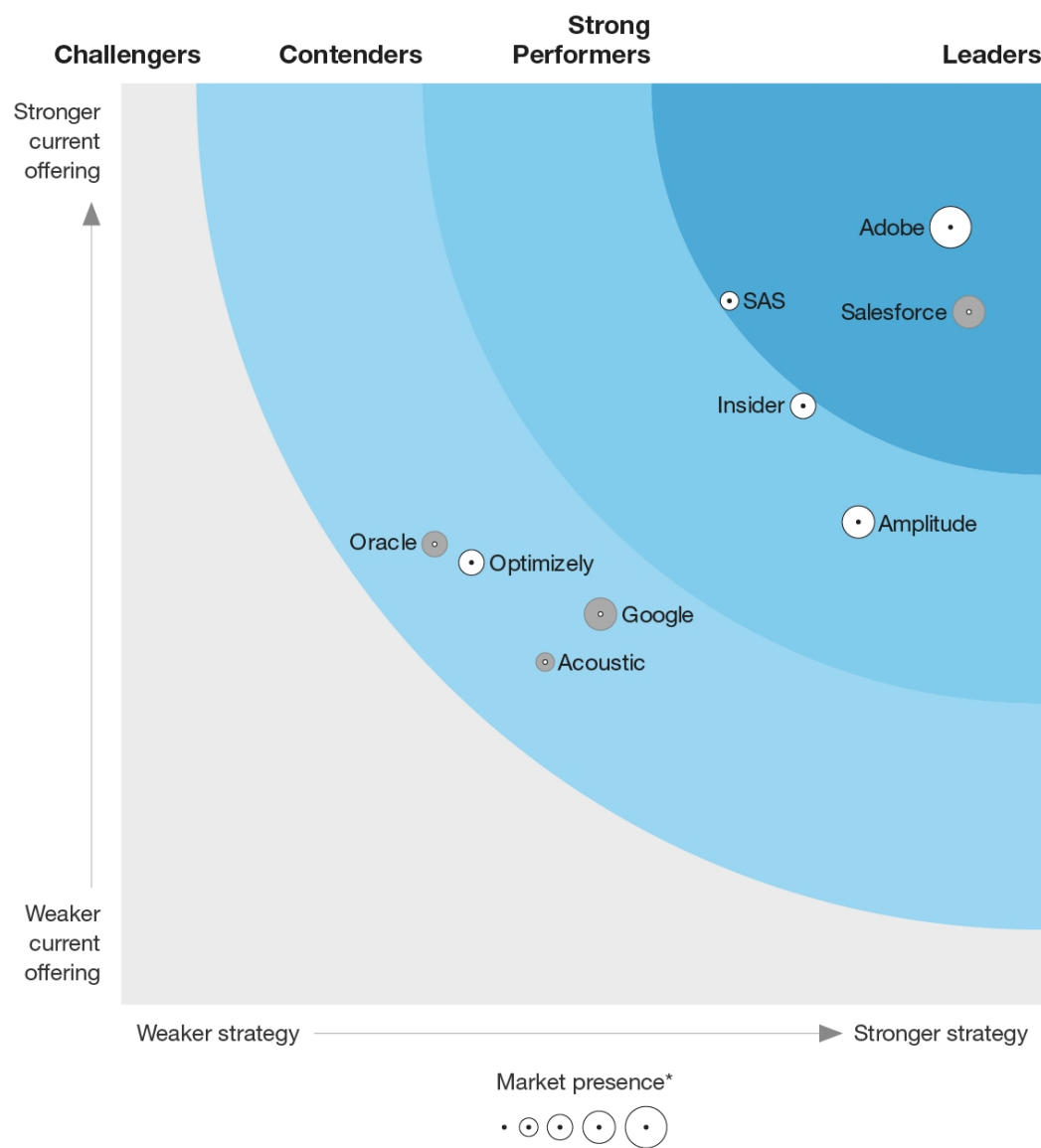
Q4 2022

*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2
Forrester Wave™: Digital Intelligence Platforms Scorecard, Q4 2022

	Forrester's weighting	Acoustic*	Adobe	Amplitude	Google*	Insider	Optimizely	Oracle*	Salesforce*	SAS
Current offering	0%	1.86	4.22	2.62	2.12	3.25	2.40	2.50	3.76	3.82
Data management technology	20%	0.60	3.00	2.10	1.50	2.50	1.70	2.10	3.40	3.50
Digital analytics technology	20%	2.20	4.10	3.00	3.10	1.75	1.30	2.40	2.40	4.10
Experience optimization technology	25%	3.00	5.00	1.80	1.80	4.20	4.20	3.80	5.00	3.80
AI/ML	10%	1.00	5.00	3.00	1.00	5.00	1.00	3.00	5.00	5.00
Digital intelligence platform overall experience	10%	1.00	5.00	3.00	3.00	5.00	1.00	1.00	5.00	3.00
Technology integrations	5%	3.00	5.00	3.00	1.00	1.00	3.00	1.00	3.00	5.00
Collaboration and management	5%	1.00	3.00	3.00	1.00	3.00	5.00	1.00	1.00	3.00
Data governance and security	5%	3.00	3.00	5.00	5.00	3.00	3.00	3.00	3.00	3.00
Strategy	50%	2.30	4.50	4.00	2.60	3.70	1.90	1.70	4.60	3.30
Product vision	15%	3.00	5.00	3.00	3.00	3.00	1.00	1.00	5.00	3.00
Execution roadmap	10%	3.00	3.00	3.00	1.00	5.00	3.00	1.00	5.00	3.00
Market approach	10%	3.00	5.00	5.00	3.00	5.00	1.00	1.00	5.00	1.00
Performance	10%	1.00	5.00	5.00	1.00	5.00	3.00	3.00	5.00	3.00
Planned enhancements	10%	1.00	5.00	5.00	1.00	3.00	3.00	1.00	5.00	3.00
Innovation roadmap	15%	1.00	5.00	3.00	5.00	3.00	1.00	1.00	5.00	5.00
Supporting products and services	10%	3.00	3.00	5.00	1.00	5.00	3.00	3.00	3.00	3.00
Partner ecosystem	5%	5.00	5.00	1.00	3.00	1.00	3.00	3.00	3.00	3.00
Delivery model	10%	3.00	5.00	5.00	5.00	3.00	1.00	3.00	5.00	5.00
Commercial model	5%	1.00	3.00	5.00	1.00	3.00	1.00	1.00	3.00	3.00

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

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	Forrester's weighting	Acoustic*	Adobe	Amplitude	Google*	Insider	Optimizely	Oracle*	Salesforce*	SAS
Market presence	0%	2.00	5.00	3.40	3.20	2.80	2.40	2.20	3.60	1.40
Revenue	40%	2.00	5.00	3.00	2.00	2.00	3.00	2.00	2.00	1.00
Number of customers	40%	2.00	5.00	4.00	5.00	3.00	2.00	2.00	5.00	1.00
Average deal size	20%	2.00	5.00	3.00	2.00	4.00	2.00	3.00	4.00	3.00

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

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Vendor Offerings

Forrester included nine vendors in this assessment: Acoustic, Adobe, Amplitude, Google, Insider, Optimizely, Oracle, Salesforce, and SAS (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

Vendor	Products evaluated
Acoustic	Acoustic Personalization, Acoustic Tealeaf
Adobe	Adobe Experience Cloud, Adobe Analytics, Adobe Customer Journey Analytics, Adobe Target, Adobe Real-Time CDP
Amplitude	Amplitude Analytics, Amplitude Audiences, Amplitude Experiment, Amplitude CDP
Google	Google Analytics 360, Google Optimize 360, Google Tag Manager 360, Google Data Studio, Google BigQuery
Insider	Insider Growth Management Platform
Optimizely	Optimizely Web Experimentation, Optimizely Full Stack, Optimizely Content Recommendations, Optimizely Product Recommendations, Optimizely Data Platform
Oracle	Oracle Maxymiser, Oracle Infinity, CX Unity
Salesforce	Salesforce Marketing Cloud Personalization, Salesforce Customer Data Platform
SAS	SAS Customer Intelligence 360, SAS Viya

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **Adobe boasts a differentiated, highly integrated platform.** Adobe has increased its customer base exponentially since launching the Adobe Experience Platform in 2019. Powered by a layer of shared services including AI/ML, privacy and governance, and real-time profiling, it's the foundation that natively connects all Adobe Experience Cloud applications. The company is customer-centric, involving prospects and customers in the prioritization of new products and features. Adobe's 40-year history shows tangible commitment to innovation, with R&D in data, content, AI/ML, human-computer interaction, NLP, and more. To integrate Adobe with other systems, customers can leverage its extensive partnership network, which isn't comparable with competitor offerings. However, Adobe does need to improve its support across all the phases of customer use case development.

  The recent Adobe Real-Time CDP and Adobe Target integration elevates experience optimization, with advanced digital analytics supported by flexible metric and segments calculation. Adobe continues to innovate in AI with, for example, Attribution IQ and Segment IQ to help digital analysis, or automated personalization that automatically selects the best content/offering for customers and builds a model for each option. A single welcome page to access all the products, and a coherent UX/UI across them, ensures a good platform experience. One area for improvement would be for Adobe to expand its identity resolution techniques in its CDP beyond a deterministic approach. Customer references praised Adobe's scalability and power to help them achieve goals across complex use cases. It best suits large, insights-driven enterprises with a well-defined enterprise architecture around digital intelligence, which they'll leverage extensively to achieve their business goals.

- **Salesforce powers AI personalization with strong customer data management.** Salesforce started from powerful customer data management capabilities. It has evolved in line with trends to offer real-time personalization through strong digital and offline data integration. Its quick growth is also due to its M&A strategy, including the personalization module powered by its Interaction Studio. The product roadmap is detailed, and recent innovations like Genie, the real-time data platform that powers Salesforce Customer 360, prove the vendor's ability to execute. Salesforce boasts a wide partner ecosystem, both for service and

technology.

Salesforce's leading AI engine, Einstein, helps marketers extract automatic insights and discover highly qualified audiences by leveraging ML, deep learning, predictive analytics, and NLP. Innovative techniques like reinforcement learning support the delivery of powerful next best experiences. The historically strong Salesforce CDP offers a wide breadth of data that enables advanced segmentations and multiple identity resolution techniques, including a custom one. The combination of the CDP with Interaction Studio, the personalization tool, created the foundation for a strong platform experience. The platform's UX/UI is modern, user friendly, and intuitive for business users. One area for improvement is the collection and management of digital data, with only basic tag management available. Salesforce is the best fit for digital marketers and e-commerce teams that require intuitive and advanced personalization capabilities, with the ability to scale across the organization. Salesforce declined to participate in the full Forrester Wave evaluation process.

- **SAS excels in data management and analytics with advanced AI techniques.**
  SAS's 46-year history in advanced analytics and business intelligence shows its strong commitment to innovation, with continuous development of advanced AI/ML techniques, such as reinforcement learning and deep learning. The vendor's extensive human and technological resources enable its mostly organic growth. It also offers the widest choice of delivery models in this evaluation, including SaaS, on-premises, PaaS, and RaaS. SAS has built a good partner ecosystem; partnerships with service partners are vital due to the highly complex deployment and integration of its products. However, this does mean that the vendor's own learning and support services need improvement. The vision is clearly focused on providing a high level of intelligence but lacks references to experience optimization.

  SAS differentiates with a high level of automation and customization in data management, modeling, and data visualization. Customer Intelligence 360, combined with SAS Viya data science capabilities, delivers powerful predictive analytics with advanced ML (e.g., un-/semi-supervised reinforcement learning or synthetic data generation) and advanced DIFM and DIY visualization capabilities with autogenerated visualization. SAS CDP offers the probabilistic identity technique in addition to the classic deterministic one. It needs to expand its experience optimization capabilities, especially when it comes to digital asset customization. SAS will best suit large enterprises — in particular in financial services, retail, or communications — that boast data science skills and want to develop custom solutions.

Strong Performers

- **Insider has strong core capabilities but needs to evolve digital analytics.**
  Insider's personalization engine is best of breed. The vendor is growing fast,
  thanks partly to senior executive support; its CEOs stay close to the customers and
  draw on their different skills, from technical to business ones, to support the
  platform's evolution. Insider's customer-centricity is reflected in its strong local
  customer success capabilities. However, its product roadmap is less exhaustive
  compared with others in this evaluation, and its partner ecosystem lags behind.

  Online testing supports self-service design and the launch of recommendation
  activities that come with many innovative templates, such as Instagram-like stories
  or mobile app stores. This enables business users to deliver simultaneous
  optimized experiences quickly. The CDP is strong thanks to identity resolution
  techniques that go beyond a deterministic approach: The Smart ID resolution
  leverages social IDs and links in different channels, such as emails and WhatsApp,
  for cross-device ID resolution. Insider offers strong predictive capabilities for
  things like discount affinity, uninstalling mobile apps, and enabling BYO solutions.
  The vendor's strong mobile app analytics is of particular value to APAC customers,
  who are predominantly mobile first. However, Insider will need to expand its web
  analytics capabilities to achieve its growth strategy in other markets. Insider best
  suits companies that want to have high speed-to-value for experience optimization
  activities and that can leverage external digital analytics tools to better target
  them.

- **Amplitude offers strong insights capabilities but must improve experience
  optimization.** Amplitude's core capability is product intelligence. Its strong product
  vision aligns with customer needs, outlining, for example, the combination of
  qualitative and quantitative insights, and the continuous loop innovation concept:
  iteration of data, insights, and action. Amplitude's growth is accelerating, thanks
  partly to its innovative delivery model, with customers able to buy subscriptions
  fully online, and an innovative commercial model aimed at startups. The product
  roadmap is highly detailed, with plans for the short term (six to 12 months), midterm
  (one and five years), and long term (10 years). Amplitude's challenge is to stay
  focused and not get lost in its wide offering of capabilities. It also needs to grow its
  partner ecosystem, with a comparatively low number of partners.

  Amplitude offers users access to prebuilt complex analysis, such as retention and
  revenue lifetime value. Users can also summarize insights and graphics in the
  Notebook, Amplitude's storytelling tool. The platform offers evolved predictive
  analytics with its root cause analysis and predictive retention. It has strong digital

data management, powered by the behavioral graph that joins the columnar and relational databases' features, ensuring speed and flexibility of queries. Amplitude needs to integrate its capabilities better, especially the recent CDP and experimentation features. Customer references love Amplitude's fast time to value thanks to easy deployment, self-service, and modern UX/UI. Amplitude is the best fit for product management departments in enterprises that need to run deep digital analysis and want to implement basic experience optimization use cases.

Contenders

- **Google offers strong digital analytics, but only basic experience optimization.** Google has consolidated its ever-evolving digital analytics capabilities, powered by solid database (BigQuery), tag management (Tag Manager), and data visualization (Data Studio) tools. Google's recent attention to data privacy follows the latest trends and is differentiating. The latest version of Google Analytics (GA) — Google Analytics 4 (GA4) — is designed to work with or without cookies and uses ML and predictive modeling to fill in the gaps where data is incomplete. The solution also reflects the customers' need to have a cross-channel and cross-device overview, thanks to the integration of both web and app digital data into a single property. However, Google needs to improve the level of supporting services, with many companies asking for external help to migrate from GA to GA4.

  Google is historically known for its strong web analytics tool, with an intuitive platform that's straightforward for business users, and offers a sufficient level of prebuilt reporting. This lets users get a good, quick overview of customer behaviors — from acquisition to conversion — and some level of demographic data. The included access to the BigQuery data warehouse is a plus that helps in merging digital data with offline data. There's a good level of dashboard customization in terms of layout and data storytelling thanks to Data Studio. With Google Optimize, Google also covers the activation side of digital intelligence, but capabilities are limited to online testing and experience personalization, without recommendations. Google is best for enterprises that are Google-centric in their digital intelligence. Google declined to participate in the full Forrester Wave evaluation process.

- **Optimizely is strong in online testing but needs to improve the platform experience.** Optimizely has a well-defined M&A strategy, including the most recent acquisition of Zaius for CDP and Welcome for workflow. These acquisitions and the planned evolution of the platform reflect digital intelligence trends, such as cross-channel empowerment. The product vision aims to solve the "5Ws" of

customers' needs (who, what, why, where, and when), but Optimizely needs to integrate and create a more coherent experience between the different products.

Optimizely's online testing is best of breed with a proprietary statistical algorithm that enables good performance in short timeframes thanks to, for example, real-time segmentation updates. Its recent acquisition of the CDP is a solid start to expanding recommendation and segmentation activities. The CDP capabilities offer a breadth of data types that go beyond the classic behaviors and customer data. Optimizely scores well on collaboration enablement because of its recent acquisition of Welcome, which allows users to easily manage, share, and annotate experience optimization activities. To fully serve digital intelligence needs, Optimizely needs to improve digital analytics — they're currently limited to experience optimization activity reporting. Customer references report that they've achieved good results in a short period of time, emphasizing the self-service capabilities and fast learning tool. Optimizely will best suit e-commerce teams with limited developer resources that need to scale their online testing activity and are happy to supplement Optimizely with other digital analytics tools.

- **Oracle has good CDP and optimization, but lags on platform experience.** Oracle's vision is to help brands personalize experiences in real time while supporting automation in decision-making. It offers a connected marketing suite, composed of separate modules for the different capabilities. This grants users flexibility in building their martech stack but also causes a disjointed platform experience and an unclear digital intelligence strategy overall.

  Thanks to Infinity IQ, Oracle offers strong experience optimization capabilities, with an intuitive platform and a good level of flexibility for segmentation and targeting. Digital behaviors and offline data are joined in the consolidated CDP, CX Unity, that's able to ingest and activate data in real time. This supports users in unifying the brand experience across the whole customer lifecycle. However, digital analytics are basic, with simple prebuilt dashboards and an interface that could be more modern. Oracle is the best fit for enterprises with more than one Oracle product. Oracle declined to participate in the full Forrester Wave evaluation process.

- **Acoustic is solid in digital analytics but needs to improve data management.** Acoustic is known for strong digital analytics, with its digital and experience analytics solutions furnishing quantitative and qualitative insights respectively. Its strategy of supporting marketers to enable, accelerate, and optimize digital journeys, and of activating omnichannel experiences, is in line with customers' needs. The marketing cloud offering contains a good breadth of capabilities that support companies from insights elaboration to experience activation. However,

the product roadmap and pricing need to be more transparent.

Acoustic offers strong integration of qualitative and quantitative data, combining classical web analytics with the recording of session replays, anomalies detection, and visitors' struggles. This makes data drill-down and the identification of root causes easy and allows users to better target personalization activities. However, the vendor should improve data management and expand tag management capabilities to include oversight of the data collected by the tags. Acoustic is best for SMEs where marketers want: 1) a clear understanding of customers' digital behaviors from a qualitative and a quantitative point of view and 2) to begin the journey of experience optimization with a good level of automation. Acoustic declined to participate in the full Forrester Wave evaluation process.

Evaluation Overview

We evaluated vendors against 31 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include data management capabilities, digital analytics capabilities, experience optimization capabilities, AI/ML techniques, overall platform experience, technology integrations, collaboration and management, and data governance and security.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated the product vision, the execution roadmap, the market approach, the performance, the planned enhancements, the innovation roadmap, the supporting products and services, the partner ecosystem, the delivery model, and the commercial model.

- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, number of customers, and average deal size.

Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: Acoustic, Adobe, Amplitude, Google, Insider, Optimizely, Oracle, Salesforce, and SAS. Each of these vendors has:

- **Functional segments.** Each vendor has at least one functional segment in one of the three technology categories that make up the digital intelligence stack (data management, digital analytics, and experience optimization). You'll find more information about functional segments and the digital intelligence stack in Now

Tech: Digital Intelligence Technologies, Q2 2021.

- **Digital touchpoints.** Each vendor offers more than one digital touchpoint for collecting digital data, analyzing, and optimizing the digital experience.

- **Revenues.** Each vendor has at least $30 million annual revenues from digital intelligence products.

- **Relevance to Forrester clients.** Forrester clients often discuss the vendors and products through inquiries; alternatively, the vendor may, in Forrester's judgment, warrant inclusion because of technology, market presence, or client interest.

Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 24, 2022 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ And New Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our

defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

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