Magic Quadrant for Multichannel Marketing Hubs

23 October 2024 - ID G00803380 - 68 min read

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Digital marketing leaders use multichannel marketing hubs to deliver contextually relevant experiences on complex customer journeys. Unified customer profiles backed by predictive insights help orchestrate personalized, multichannel engagement. Use this research to identify suitable MMH solutions.

Market Definition/Description

Gartner defines multichannel marketing hubs (MMHs) as software applications that orchestrate personalized communications to individuals in common marketing channels. MMHs optimize the timing, format and content of interactions through the analysis of customer data, audience segments and offers. MMHs are foundational for multichannel marketing, customer journey orchestration and next best action programs.

MMHs enable marketers to engage customers through personalized interactions in common retention marketing channels. They are used to improve revenue, customer engagement, loyalty and lifetime value. Independent SaaS firms offer stand-alone MMH products as do larger enterprise application providers, which package them as multiproduct solutions to complement other software offerings, like adtech or CRM for sales. MMHs are similar to email platforms, mobile marketing platforms and B2B marketing automation. They are often used together with customer data platforms, content management tools and personalization engines. At a minimum, MMHs must enable marketers to use data to deploy media across channels to addressable individuals.

MMH buyers are responsible for delivering revenue and engaging experiences. Buyers are found in consumer-focused business units in financial services, media, retail and more. Marketers typically use MMHs to manage a portion, but not all, of the channels used in multichannel marketing. Buyers typically start with two or three channels, typically email and SMS along with ad network integrations. MMH users focus on four workflows:

- Profile and audience management

- Campaign and journey building

- Measurement and campaign optimization

- Analysis and program optimization (next best action)

Users typically draw from marketing, data and analytics, operations, commerce and product management teams.

Historically, MMHs prioritized critical capabilities — like analytics-driven segmentation or personalization — in support of large-scale campaigns. Buyers valued MMHs for their ability to boost customer lifetime value and revenue per message. Providers differentiated on analytical capabilities or the scale and speed of execution. As marketers turn to customer journey orchestration, users now task MMHs with engagement-focused customer experiences: multistep, event-driven journeys that stretch across channels, such as onboarding or life cycle campaigns. Buyers still look for ROI but increasingly value customization, integration and AI/ML capabilities.

Must-Have Capabilities

To support multichannel marketing programs, MMHs must provide:

- **Customer profile management**: The integration of multiple customer data feeds into unified customer profiles that enable campaign management, journey orchestration and channel execution. MMHs need persistent profiles to enable retargeting and time-based journeys. MMHs are often paired with a stand-alone CDP, while some MMHs offer robust capabilities natively.

- **Campaign and journey management**: All MMHs offer UX support for campaign and journey building workflows, including functionality supporting campaign and event-triggered journey design, testing and versioning (journey life cycle management). The UI must be suitable for nontechnical users who are responsible for planning, executing and reporting on campaign or journey performance.

- **Multichannel execution and measurement**: Providers must be able to deploy and measure the performance of personalized messages from campaigns and journeys through a mix of native channels and integrated activation points. At minimum, these include email, SMS (or other mobile) and advertising in common walled garden destinations.

Standard Capabilities

Standard MMH capabilities include:

- **Advanced data management**: Data collection and management capabilities enable multichannel marketers to collect mobile data, manage other entities (such as product catalogs for personalized offers), perform data transformation operations and support "zero copy" or virtual data access in cloud data warehouses.

- **Analytics**: Provide support for a variety of analytical methods and techniques that enable marketers to enhance targeting and personalization, as well as optimize overall program performance through segmentation, predictive models or customer journey analytics.

- **Advanced multichannel execution:** Beyond basic multichannel execution, MMHs commonly offer additional web, mobile, social, paid media and other channels for use in campaigns and journeys.

- **Application management**: Applications provide tools that enable marketers to support multidisciplinary workflows through user management, permissions, conformance with industry and regulatory standards (e.g., SOC2) and policy governance of its own capabilities, such as a global frequency cap on messaging to individuals.

Optional Capabilities

MMH providers differentiate by providing:

- **Prescriptive intelligence and decisioning**: Automated guidance helps marketers identify and maintain underperforming journeys (anomaly/opportunity detection) as well as to prioritize and optimize the overall mix of journeys and campaigns (next best action).

- **Campaign ideation**: GenAI-enabled capabilities help marketers develop new ideas for campaigns and journeys through ad hoc, text-based queries and interactive campaign briefs.

- **Campaign content and code generation**: GenAI-enabled capabilities enable users to create or manage content that is unique to multichannel marketing (beyond the ability of an MMH to ingest content from other sources, like DAMs). Capabilities may include the creation of personalized variants, real-time content as well as code-based elements, like surveys and landing pages.

- **Collaboration and work management**: These capabilities enable marketers to manage and optimize marketing planning, through native or integrated project and task management, budgeting, resource management and marketing calendar management.

- **Consent and preference management**: Provides advanced consent and preference management capabilities, either natively or integrated third-party or white-labeled service, such as consent collection, permission management, audit, and detailed preference and opt-in management.

- **Digital commerce and content**: Supplements direct marketing capabilities with richer content management (including personalized search) and digital commerce capabilities.

Magic Quadrant

Figure 1. Magic Quadrant for Multichannel Marketing Hubs

Vendor Strengths and Cautions

Acoustic

Acoustic is a Niche Player in this Magic Quadrant. It combines Acoustic Campaign and a recently launched orchestration product called Acoustic Connect, consisting of campaign management, content management, personalization and analytics modules that aim to unify the customer experience by connecting the buying experience with marketing engagements. Acoustic's operations are focused in North America and EMEA, with clients mostly in midsize and large enterprises in financial services, retail, and travel and hospitality. Acoustic has improved its Insights tool, simplifying for customers the process of duplicating and customizing their analytics dashboards. Acoustic is focused on enhancing journey orchestration with the launch of Connect, as well as improving marketing workflow automation, enabling users to add paths, interactive polls and surveys to guide customer journeys and enhance customer insights.

Acoustic did not respond to requests for supplemental information or to review the draft contents of this document. Gartner analysis is, therefore, based on other credible sources, including public information and discussions with users of its multichannel marketing hub (MMH) solution.

Strengths

- **Snowflake partnership:** Snowflake is now embedded in Acoustic Connect, enabling marketers to access enterprise data within a marketing UI. This new partnership allows Connect customers already using Snowflake to expand the number of customer attributes marketers can use to personalize multichannel campaigns.

- **Traditional campaign tool:** Acoustic has simple, straightforward packaging and Connect's core capabilities power multichannel campaigns. While clients can use Acoustic with a customer data platform (CDP), they can also use Campaign's built-in data management and analytics to forgo a CDP and still achieve sophisticated targeting and personalization. Those with advanced use cases can tap into Acoustic's partner network for a suitable CDP.

- **User onboarding and training:** The onboarding experience is simple, and its templated onboarding process allows users to quickly begin creating campaigns and journeys to execute. Acoustic provides strategic and operational support through dedicated customer success directors assigned to each customer, though technical support costs extra.

Cautions

- **Transformational risk:** After several years of incremental innovation in Acoustic Campaign, Acoustic launched Connect in March 2024. Connect's focus on real-time orchestration complements Campaign's focus on traditional campaigns. Existing Campaign clients should not expect Connect to replace Campaign in the near term, particularly for complex, batch campaigns.

- **Market momentum:** Five years on from its spinoff from IBM, Acoustic is still trying to find its foothold in this market, and the launch of Connect may increase the difficulty of retaining legacy clients. While Acoustic remains a valuable partner to its existing client base, buyers should scrutinize the company's overall viability and its ability to simultaneously resource Connect's ongoing development and its portfolio of legacy products.

- **Prescriptive intelligence:** Acoustic's roadmap focuses on integration and its investments in orchestration will primarily focus on infrastructure enhancements rather than higher-order, marketer-facing functionality. New marketing buyers should be cautious, carefully evaluating whether Acoustic's current capabilities will hinder marketers from productively scaling journey orchestration programs.

Acquia

Acquia is a Niche Player in this Magic Quadrant. Its MMH is composed of Acquia CDP, Acquia Campaign Studio, Acquia DAM, Acquia PIM and Acquia Personalization. The company's operations are focused in North America and EMEA, and it has clients in retail, professional services, healthcare, consumer goods and education. AI enhancements include asset classification and organization, with embedded AI assist to build journeys and integrate personalized content seamlessly. Acquia's reporting dashboards evaluate performance by campaign, channel or audience type, helping users optimize and adjust campaigns. Acquia's

roadmap focuses on customer profile management for identity resolution, cloud data platform integrations and consent management.

Strengths

- **Web-centric orchestration:** Acquia's MMH enables clients to build digital journeys through Campaign Studio. It also integrates deeply with Acquia Digital Experience Platform (DXP), enabling users to target or personalize ads, multichannel messages and offers based on on-site engagement history or other integrated profile insights. Campaign Studio shines brightest when organizations that are heavily dependent on web experiences use it to extend the value of Acquia DXP for web-dominant orchestration.

- **AI personalization capabilities:** Acquia's AI personalization capabilities support journey building through audience segmentation, and through content creation and content recommendations. Generative AI (GenAI) capabilities also appear in Acquia's built-in AI assistant, helping marketers develop personalized journeys across channels through a simple interface.

- **Channel and content preference:** In addition to drag-and-drop features for personalization, the offering supports teams seeking to leverage analytics and AI to better engage microsegments within a campaign. Acquia DAM Insights lets users automate the selection of channel and content based on past campaign performance or customer preferences.

Cautions

- **Complex pricing model:** Acquia offers its solution in three package tiers (Standard, Premium and Enterprise), using seven distinct pricing metrics. Multichannel marketers may struggle to translate messaging volumes into data-centric operational costs. Marketing buyers are advised to partner with IT resources to help model data consumption costs at the campaign level. Acquia's higher package tiers can deliver more sophisticated experiences, but with higher data operations costs.

- **Advertising support:** Acquia's MMH solution focuses primarily on owned channels like website and email. It offers native integrations with Meta and Google, but users must turn to partners for other common social media channels, including YouTube, Instagram and TikTok. Marketing buyers who prioritize advertising integration should assess Acquia's partner ecosystem and its roadmap for native channel support.

- **Prescriptive intelligence:** Acquia has improved AI capabilities in its CDP platform for personalization, but reporting remains limited, potentially hindering users' ability to optimize sequences of journeys; or worse, to identify which journeys are most in need of maintenance. Acquia offers limited support for identifying best-performing content and journeys at scale. Its improvements in reporting will need to continue, along with enhancements to the reporting UI, to support the necessary real-time journey prioritization that larger organizations seek.

Adobe

Adobe is a Leader in this Magic Quadrant. Adobe's MMH solution is composed of Adobe Journey Optimizer, Adobe Real-Time Customer Data Platform, and Adobe Customer Journey Analytics

applications powered by Adobe Experience Platform. Adobe's extensive global reach is supported by a robust network of technology and service partners, serving enterprise clients across a variety of industries. Experience Platform can be used for integrated data management, journey orchestration and journey analysis. Many clients continue to rely on Adobe Campaign to operate sophisticated campaign-based programs. Notable roadmap enhancements include GenAI-enabled workflows and Federated Audience Composition with select cloud data warehouse platforms.

Strengths

- **Vision and reach**: Adobe's vision for multichannel marketing centers on orchestration and personalization, but it differentiates from its competitors through its long reach across marketing, creative and commerce teams. Multichannel campaigns and journeys are complex to make and depend on other teams and processes, many of which Adobe supports through its product suite. Marketing buyers should evaluate Journey Optimizer with these other tools, testing for faster production times across all supporting processes.

- **Audiences and personalization**: Adobe's MMH solution is best realized in Journey Optimizer's features for targeting and tailoring content. In the last year, marketers gained the ability to compose new audiences from old, as well as manage those audience definitions through their life cycles. Users can also create web and mobile app experiences for journeys in a no-code designer.

- **Ecosystem partners and certifications**: Adobe's MMH solution is complemented by Adobe's in-house professional services and an extensive network of consulting firms, systems integrators and agency service providers. Adobe has enhanced industry solutions through these partners and products like Healthcare Shield, which help it deliver value in regulated industries.

Cautions

- **Rising license and data costs**: In Gartner inquiries, Adobe clients often complain of high cost, citing both product licenses and data processing as drivers, but also Adobe's platform modernization strategy for its product portfolio. Many remain bound to Adobe Campaign, not only for audiences and segmentation, but also because marketers have already fine-tuned skills, team structures and marketing workflows for it. Adobe has committed to long-term support for Campaign, but clients must plan for ongoing change as older versions are retired in the years ahead.

- **Platform strategy:** Adobe's long-term product strategy for multichannel journey orchestration is its platform. As marketers adopt Journey Optimizer, they are likely to need to make corresponding investments in Real-Time CDP and Customer Journey Analytics. Journey Optimizer can be used with third-party CDPs, but some MMH critical capabilities may not function as expected. Marketing buyers seeking full support for multichannel marketing should anticipate that their preference for Journey Optimizer may be constrained by their enterprise's choice of CDP and CRM/SFA provider.

- **Prescriptive intelligence**: Rather than a guided or prompted approach that identifies issues needing marketers' attention, Adobe's anomaly detection and action recommendation features

are largely self-serve. Organizations seeking to improve performance of next best action or experience may find its decisioning capabilities insufficient. Configuration and data integration challenges may limit time to value.

Bloomreach

Bloomreach is a Visionary in this Magic Quadrant. Its Bloomreach Engagement MMH focuses on enabling marketers to support personalized, omnichannel commerce through its CDP-caliber Customer Data Engine. Bloomreach's operations are focused in North America and EMEA, and its clients tend to be midsize and enterprise customers in retail, financial services, manufacturing, and travel and hospitality. Its roadmap focuses on continued investment in Bloomreach Clarity, with conversational AI aimed at improving the chatbot's use of brand voice in digital shopping experiences. Bloomreach Engagement's AutoSegments will create new campaign or journey targets that match marketers' specific goals for a campaign.

Strengths

- **Customer profile management**: Bloomreach focuses on connecting online and offline experiences in one platform. Its data management capabilities derive from its acquisition of CDP provider Exponea, which offered a flexible architecture, allowing customers to easily develop and deploy audiences and triggers that execute across channels.

- **GenAI-enabled vision**: Bloomreach has deep strengths in AI and machine learning (ML) for commerce experiences, which adds credibility to its vision of GenAI-enabled multichannel marketing. Clarity, its AI chatbot, is a personalized shopping assistant that can provide product information and enables consumers to complete purchases or modify orders.

- **Goal-based library**: Bloomreach Engagement's out-of-the-box journey library speeds up campaign cycle time, allowing marketers to configure new journeys or import their existing journeys from legacy MMHs. Its library is organized by goal-based use cases — for example, acquisition or retention — with strongest support for digital commerce programs.

Cautions

- **Retail and digital commerce focus**: Bloomreach is a robust and rapidly developing MMH solution for retailers and marketers with a digital commerce focus. While Bloomreach Engagement can serve a variety of multichannel marketing programs, its most advanced capabilities may be less useful to marketers with broader customer relationship goals.

- **Short history of success in MMH**: Bloomreach's embrace of multichannel marketing is relatively new, and this is most evident in the below-average deal sizes and number of channels that its buyers purchase in their initial contracts with Bloomreach. A 2023 Gartner survey of multichannel marketers found large enterprises may use 11 or more channels to accomplish more marketing goals. These findings suggest that buyers with broad multichannel programs should carefully evaluate Bloomreach's ability to consolidate marketing channels.

- **Regional third-party support**: Bloomreach's operations are global, with its headquarters in the U.S. Its MMH is most commonly used by marketers in EMEA. While its product is perceived as

easy to use by marketers, the company doesn't have a broad ecosystem of partners to support enterprises that are seeking to boost growth and performance by consolidating martech and streamlining multichannel processes. Marketing buyers outside of Europe should carefully evaluate Bloomreach's regional support network.

Braze

Braze is a Leader in this Magic Quadrant, based on the strength of its Customer Engagement Platform and its growing presence in enterprises. Braze specializes in advanced multichannel execution and journey orchestration, supported by advanced data management features. Its operations are global, predominantly in North America, EMEA and Asia/Pacific, and its clients tend to be B2C marketers in retail, financial services and healthcare. Notable platform enhancements include GenAI-enabled journey building, feature flags and last-mile creative personalization with GenAI. In addition to AI features, Braze has enhanced conversational channels like WhatsApp and updated its dashboard experience. At the time of evaluation, Braze also planned to enhance its underlying data management capabilities by adding zero-copy data access for its data warehouse integrations.

Strengths

- **Scalable data architecture:** Braze builds on its batch and stream processing architecture to service both traditional campaigns and orchestrated journeys in a single solution for multichannel marketing. Braze can operate with an existing CDP but isn't dependent on one to enable multichannel marketers with advanced data features. This year, Braze plans to extend its direct integrations with cloud data platforms, strengthening users' ability to target or personalize experiences using data not directly stored within Braze.

- **Strengthening ecosystem:** Braze shows the most significant rise in market presence of all MMH providers in this evaluation, evolving into a brand that can be trusted to service large enterprises, even in regulated industries. Braze's continued flourishing is underwritten in part by its investments in its consulting and service partner ecosystem; in the past year, it has added Accenture to its burgeoning roster of global and regional partners.

- **GenAI-enabled messaging and journeys:** Braze has updated its integrated GenAI-enabled capabilities to help users produce more personalized experiences. Braze enables multichannel marketers to generate text and images for testing or personalized variations at each step of a journey, storing outputs for later reuse. Gartner Peer Insights reviewers praise Braze's personalization capabilities and the ease of using its journey builder, Canvas Flow.

Cautions

- **Rising total cost of ownership:** Braze offers a slick user experience (UX) for marketers, but it is also best suited for organizations staffed with data engineers, mobile app developers and others in technical roles who can embed Braze deeply into mobile apps and websites. Combined with Braze's increasing reliance on its ecosystem for growth, marketing buyers should assess Braze for its ability to grow strategic value commensurate with its total cost of ownership.

- **Prescriptive intelligence:** Braze's modern UX and GenAI features simplify and speed up journey building, yet Braze trails other providers in supporting optimization through prescriptive intelligence. Gartner Peer Insights reviewers cite the difficulty of monitoring and dynamically prioritizing campaigns and journeys.

- **Analytics and reporting:** Braze lags other providers in its analytics, especially in reporting marketing effectiveness to stakeholders. While Braze supports large-scale data exports to other data and analytics tools, Gartner Peer Insights reviewers' most frequent complaint is the need to supplement Braze's dashboards with third-party reporting tools.

Cordial

Cordial is a Niche Player in this Magic Quadrant. The Cordial platform helps direct-to-consumer organizations use AI to personalize multichannel customer journeys through unified profile management, predictive analytics and multichannel execution. Cordial operates primarily in North America with offices in EMEA, and serves midsize and enterprise clients in retail, media and consumer services. Its roadmap focuses on prescriptive intelligence, journey orchestration and message composition.

Strengths

- **Vertical/industry strategy:** Cordial has built a strong client base in direct-to-consumer businesses, due to its tailored product offering and high-touch service model. Cordial excels at appealing to multichannel marketers within firms who are ready to prioritize the use of advanced analytics and adapting their operations to campaign cycle times.

- **Customer profile management:** Cordial's modern data architecture enables the Cordial platform to aggregate data from multiple systems, resolve identities, and then target or personalize using an array of prebuilt models. Cordial builds on this foundation with AI-enabled audience creation and content personalization.

- **Boutique customer experience:** Cordial leverages its data and analytics capabilities to deliver insights in the first month of use, helping marketers design new campaigns while completing IP-warmup for email programs. It assigns all clients a named customer success manager, and the company offers a range of professional, deliverability, strategic and campaign production services.

Cautions

- **Market presence:** Cordial's focus on midsize retail businesses constrains its value to marketers in other industries, especially those that seek to improve coordination across multiple customer-facing business units or regions. Cordial has an ambitious roadmap, but its small size and shallow resources relative to other providers in this evaluation may deter risk-averse marketing buyers.

- **Prescriptive intelligence:** Cordial, despite its strengths in analytics and AI/ML, offers limited capabilities for identifying and optimizing underperforming journeys automatically, and recommending changes to attain performance targets. To help marketers prioritize the growing

number of journeys, at the time of evaluation, Cordial's roadmap aims to bring AI-based prescriptive intelligence features to market over the next year.

- **Service provider ecosystem:** Cordial's partner ecosystem centers on technology partners and commerce-focused agencies. It plans to build a larger network of partnerships in consulting, system integration and larger agencies. Marketing buyers who seek to leverage service providers in multichannel marketing should evaluate Cordial's in-house capabilities.

Insider

Insider is a Visionary in this Magic Quadrant. Its Insider Growth Management Platform orchestrates multichannel messaging that includes basic CDP capabilities such as customer profile management. The platform supports a unified customer profile and AI/ML-driven personalization across channels. Insider operates globally with offices in Latin America, EMEA and Asia/Pacific, and its clients tend to be B2C mid- to enterprise-scale clients in media, retail, financial services, telecommunications, and travel and hospitality. Its roadmap includes content scoring to help marketers understand a content asset's performance across a campaign. Insider will also continue to invest in its native-AI assistant and plans to enhance prescriptive intelligence features for next best actions and messaging.

Strengths

- **Time to value:** Insider offers both marketers and their customers accelerated time to value through AI. For marketers, Insider's updated Sirius AI accelerates marketing velocity through GenAI, building entire journeys and associated media that marketers can then refine. Insider can also automate some customer service and marketing interactions through GenAI-powered chatbots, owing to last year's MindBehind acquisition.

- **Prescriptive intelligence:** Insider has strengthened Sirius AI's prescriptive intelligence features in the last year, giving it the ability to suggest new audiences for marketers to target in campaigns and journeys. Marketers can also use its expanded governance features to optimize each day's overall mix of traditional campaigns and triggered journeys. Marketing buyers seeking to scale next best action programs should assess Insider for its rapid development of journey optimization features.

- **Packaging and pricing:** Insider has streamlined its packaging and pricing model to drive higher marketer adoption. Formerly sold separately, Insider has bundled its MMH, CDP and personalization engine products into a single customer engagement platform offered with three tiers of feature sophistication. For pricing, it uses only three metrics to determine costs (messages, contacts and API calls).

Cautions

- **Deployment scale:** Insider's rapid growth has come primarily from smaller MMH deployments than is typical of providers in this evaluation. Its contract lengths are predominantly weighted toward one-year terms. While some recent client wins suggest Insider can scale to enterprise deployments, marketing buyers who need to support extensive MMH deployments should speak with Insider's reference clients to mitigate risk.

- **Feature maturity:** Insider's move from Challenger (in last year's Magic Quadrant) to Visionary reflects its aggressive investment in AI-enabled features. While its rapid release of AI features impresses, its relatively small presence in large enterprises warrants caution. Marketing buyers seeking to support sophisticated next best action programs should carefully assess feature maturity.

- **Regional growth strategy:** Insider's recent growth has occurred largely in Asia/Pacific and EMEA, supporting regional subsidiaries of multinational companies. Marketing buyers in North America and Latin America should evaluate Insider's available local services and partners alongside its product features. Marketers can mitigate this risk by starting with regional deployments in Europe or Asia, then scaling to other regions as they develop internal expertise with Insider.

Iterable

Iterable is a Challenger in this Magic Quadrant. Its MMH focuses on ingesting data from multiple datasets to allow marketers with mature email and SMS strategies to implement adaptive campaigns and journey-building capabilities. Iterable's operations are primarily in North America and EMEA. Its clients tend to be midsize to large enterprises in retail, professional services, media, travel and consumer goods. Planned enhancements include enhanced AB and multifactorial test automation, journey generation, an insights dashboard with system alerts, and message prioritization recommendations to optimize daily marketing execution.

Strengths

- **Multichannel execution:** Iterable offers customer-engagement-focused marketing buyers support for scalable and personalized multichannel execution through flexible data management. Gartner Peer Insights reviewers laud its ability to support high-volume marketing programs through a combination of advanced campaign and journey management features, and its competitive pricing.

- **Boutique customer experience:** Iterable resources client onboarding with a dedicated project manager and technical consultant for help with implementation. The provider completes nearly all implementations using internal resources with the goal of helping clients manage complex data integration needs.

- **Last-mile content generation:** Marketing users can increase personalization through GenAI-enhanced message composition features. Iterable's Smart Opt-In feature promises to increase relevance by fine-tuning each message variation, tailored with Iterable's integrated data and analytics features.

Cautions

- **End-to-end journey orchestration:** Iterable's strong focus on channel execution may challenge marketers who seek to link customer activities across touchpoints and govern next best actions across multiple business units. Multichannel marketers are cautioned that some

channels, like consumer messaging platforms, require manual configuration or third-party services.

- **Collaboration and work management**: Iterable's live journey editing aims to speed optimization activities, but this capability can challenge workstream efficiency at organizations with disciplined planning and approval requirements. Large marketing teams managing multiple journey campaigns may encounter workstream efficiency challenges resulting from a need for workstream approval processes that must be built outside the tool.

- **Reporting**: Organizations moving from traditional campaigns to journey orchestration may encounter challenges with Iterable's segmented campaign dashboard. Report building may still require manual work by marketing analytics resources, especially when comparing campaign and overall marketing performance.

MessageGears

MessageGears is a Niche Player in this Magic Quadrant. It supports campaign management and advertising for organizations that seek to operate martech applications directly on data stored in an existing data warehouse. Its operations are mostly in North America and EMEA, and its clients tend to be midsize to large enterprises in retail and e-commerce, travel and hospitality, and media and entertainment. MessageGears has focused development on integrating the channel capabilities of the Swrve mobile marketing platform that it acquired in 2023, and developing AI and predictive models for campaign use. It plans continued investment in data use functionality, channel and campaign optimizations, and seamless in-app implementations.

Strengths
- **Data-platform-centric vision**: MessageGears offers a powerful approach for specialized MMH buyers who have rigid data warehouse requirements. These buyers prefer using modular components to reduce costs and time to market, while increasing autonomy from enterprise application providers. Most MMHs offer integrations with cloud data platforms, but MessageGears differentiates by not storing data outside them.

- **Classic campaign management**: Users can build audiences directly from warehouses using Message Gear's segment builder and activate them in campaigns using its native cross-channel execution features. Customers can create journeys via Engage's templates, which create targeting rules for multichannel campaigns, including segmentation, campaign prioritization and content personalization in one workflow.

- **Client experience and easy migration**: MessageGears offers tailored 24/7 customer service with a dedicated support manager and access to subject matter experts. Implementation requires no data migration, while still being able to ingest templates from prior platforms into the solution. The platform sends data back to the customer's data warehouse in real time.

Cautions
- **Composability**: MessageGears' approach to composable martech is further ahead than what most buyers in the market require. Its strategy promises to make MMH application capabilities

more adaptable to enterprise data architecture with functionality that integrates customer data and engagement capabilities. But in practice, this can increase the burden for IT teams to accommodate marketing's profile management needs outside the MMH. Prospective buyers should consider carefully whether this vision aligns with their team's in-house abilities.

- **Product roadmap:** MessageGears' execution against its product roadmap has been tied up with its acquisition of mobile marketing platform Swrve. The effort to integrate the two companies has limited its development of GenAI offerings, including profile management, journey building and content-generation features. Marketing buyers considering MessageGears should weigh the value of data warehouse integration against the company's more limited support for multichannel marketing tasks.

- **Partner ecosystem:** MessageGears offers relatively few service partners compared with most other providers in this evaluation. Prospective marketing buyers who will look to consultancies and agencies to help integrate and operate the product should assess MessageGears' ecosystem for support prior to selection.

Optimove

Optimove is a Visionary in this Magic Quadrant. It features a unified customer profile with AI-powered segmentation, campaign management, journey orchestration, analytics and execution. Optimove's operations are focused in EMEA, North America and Latin America, with clients in retail, gaming, media, transportation and financial services. Recent enhancements include an AI-enabled assistant that can generate audiences for targeted campaign personalization. Optimove's roadmap includes enhancements to automated journey optimization, additional GenAI features for analysis and content creation, and in-product collaboration and task management features.

Strengths

- **Customer journey orchestration:** Optimove's prescriptive intelligence features help marketers optimize sequences of individual journeys to drive both high engagement and revenue growth. Gartner Peer Insights reviewers praise these features, especially Optimove's ability to analyze customer segment migration patterns and support next-best-action programs.

- **AI-enabled campaign ideation:** Optimove augments its strengths in journey orchestration by adding features to help accelerate marketing velocity. Its AI-enabled assistant provides insights into audiences and predicts relevant offers to aid campaign planning. Marketing buyers seeking to democratize access to insights should evaluate Optimove for its ability to accelerate campaign ideation tasks, like audience identification.

- **Onboarding and customer experience:** Optimove's new learning management platform and in-product guidance features include tips, tutorials, courses, talk tracks, quizzes and questionnaires to support seamless use and adoption. Gartner Peer Insights reviewers praise the ease of onboarding, crediting its dedicated data engineers and customer success managers.

Cautions

- **Algorithmic journey orchestration:** Optimove's sophisticated approach to next best action and journey orchestration may exceed the needs of and benefits to organizations that don't require high-frequency engagement or contact. Marketing buyers should conduct proofs of concept (POCs) to assess Optimove's impact on productivity and revenue expectations for journey orchestration.

- **User experience:** Marketing buyer's should weigh Optimove's advanced AI features against an underwhelming user experience, especially for midsize organizations with fewer specialized resources. Gartner Peer Insights reviewers note challenges with certain UI elements, including Mission Control's poor responsiveness when handling many concurrent campaigns and a glitchy email template builder that may unexpectedly recode links.

- **Partner ecosystem:** Optimove has a relatively small partner network compared with other providers in this evaluation, particularly with respect to implementation and agency service providers. Optimove shares few joint clients with these agencies and performs all onboardings in-house, suggesting a lower priority on developing its network. Marketing organizations that rely on outsourcing to service providers for operations should examine Optimove's current and future plans for developing its ecosystem.

Pegasystems

Pegasystems (Pega) is a Niche Player in this Magic Quadrant. Its MMH is Pega Customer Decision Hub (CDH), which specializes in predicted customer engagements supported by real-time AI capabilities. Pega's operations are geographically diversified, with a focus in EMEA and North America. Its clients tend to be enterprise B2C marketers in financial services, healthcare and telecommunications. Pega has enhanced its Impact Analyzer to assist with size of lift and revenue impact, and improved support for operating its next best action (NBA) programs across multiple lines of business. Planned investments include email and SMS, continued investment in analytics, GenAI-enabled workflows, content creation for NBA treatments and deeper integrations with Google Cloud Platform and Snowflake.

Strengths

- **Next-best-offer approach:** Pega offers a sophisticated model and AI-enabled workflows for predicting and arbitrating customer offers or actions in real time. Engagement policy filters help marketers align this advice with their business and brand strategies. Marketing buyers seeking to optimize marketing actions across lines of business should evaluate CDH for its ability to govern the next action taken with a customer.

- **Authenticated personalization:** CDH differentiates from many MMHs by enabling server-side personalization within authenticated customer portals. It offers analysts and data scientists robust analytics, and the ability to develop and deploy AI and ML models in these channels. Pega's approach to optimization can apply to offers, placements in a portal and creative treatments.

- **Workflow management:** Pega 1:1 Operations Manager allows marketers to manage and assign work to specific individuals and brand teams. It provides a single point of control, enabling

marketing teams to triage and manage rapidly shifting assignments effectively. Pega's introduction of GenAI-enabled capabilities signals an intention to democratize the use of CDH with multichannel marketers.

Cautions

- **MMH vision:** Pega has a history of success with large, often regulated enterprises that seek to govern and prioritize actions across business units. Clients admit in Gartner inquiries that despite Pega's positioning as marketing's "brain," marketer adoption remains low, limiting its impact. Pega's growth in MMH has slowed compared with its past performance and relative to other vendors in this evaluation, suggesting a widening gap in product-market fit.

- **Onboarding and support costs:** The flip side of CDH's sophistication is its lengthy time to value and lower-than-average marketing user adoption. Pega reports onboarding times that are significantly longer than those of others in this evaluation. In Gartner inquiries, customers complain of low adoption due to CDH's steep learning curve and long training times. Marketing buyers should conduct POCs to assess their marketers' ability to use Pega's advanced feature set.

- **Product strategy:** Outbound campaign management is the backbone of the MMH market, yet Pega has a low presence in email, mobile or advertising campaign management. Pega's focus on decisioning and analytics undercuts its ability to scale NBAs and journey orchestration to more traditional marketing programs. While it successfully retains clients, they don't often expand their use of CDH within outbound channels, like email marketing.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its MMH solution is Salesforce Marketing Cloud Engagement, supplemented with Data Cloud for Marketing, Personalization, Intelligence and Loyalty Management. Salesforce aims to serve marketing teams of all sizes, and its operations are diversified and global. Its MMH clients are mainly B2C marketers in the enterprise banking, insurance and healthcare, media and retail industries. Salesforce continues to focus heavily on expanding the capabilities of its Data Cloud to unify, analyze and activate customer profiles across its sales, service, commerce and marketing clouds. Its roadmap focuses heavily on leveraging AI-enabled agents to simplify and automate data- and process-intensive operations, like campaign brief creation.

Strengths

- **Broad portfolio and deep ecosystem:** Salesforce enables complex commercial organizations to centralize and coordinate the implementation of CRM programs (marketing, sales and service) across multiple Salesforce cloud products. Salesforce Marketing Cloud Engagement equips users with a combination of robust features and broad third-party ecosystem support.

- **Data Cloud and Einstein:** Salesforce's investments in Data Cloud enables expanded storage and processing of unstructured interactions, like chat and voice calls. With Data Cloud and Einstein AI, multichannel marketers gain access to advanced analytics and the ability to better

coordinate customer-facing actions and messages across Salesforce's Sales and Service Clouds.

- **GenAI reach:** Salesforce's broad technology portfolio and large partner ecosystem offer marketing buyers the ability to disseminate GenAI innovations to many customer-facing roles across a large enterprise. Marketing leaders can enhance marketing, sales or customer service experiences through personalized content, generated through prompts and automations. Marketing buyers can turn to Salesforce's large partner ecosystem and Trailblazers community to help users adopt these new features.

Cautions

- **Marketing Cloud stagnation:** Salesforce allows marketers to better govern customer interactions across multiple business units and CRM functions, but it offers little support for next best action or prescriptive intelligence. Until Salesforce completes the migration of existing Journey Builder journeys to Flow Orchestrator flows, Marketing Cloud Engagement users must manually implement next best action programs across Salesforce's customer-facing technologies.

- **Platform strategy:** Salesforce's future multichannel and orchestration capabilities leverage Data Cloud. Both current clients and new Marketing Cloud customers should anticipate the need to utilize Data Cloud. This dependency may burden organizations with redundant data integration and profile management features, especially if their marketers already rely on other CDPs. Marketing buyers should anticipate that their choice of MMH may be constrained by their enterprise's choice of other data platforms.

- **Cost to value:** In Gartner inquiries, some Salesforce clients complain about the company's ability to deliver value relative to cost for multichannel marketers. For them, rising data management costs and complex pricing models underscore Marketing Cloud Engagement's stagnation and the company's multicloud platform strategy. Prospective marketing buyers considering Marketing Cloud Engagement should assess the platform's breadth, cost and their need for coordinated marketing, sales and service actions.

SAP (Emarsys)

SAP Emarsys is a Challenger in this Magic Quadrant. Its solution for multichannel marketing is SAP Emarsys Customer Engagement Platform. SAP's operations are global and serve clients in retail, consumer goods, media and entertainment, and travel and hospitality. It has recently expanded channel support, including TikTok and LinkedIn ads, enhanced audience analytics, and released a basic GenAI-enabled content creation feature. SAP plans additional GenAI-enabled features and an AI-based product finder. It also plans to improve reporting for multibrand businesses to help marketers analyze metrics across regions or brands.

Strengths

- **Provider stability:** SAP continues to invest in multichannel marketing features, enhancing Emarsys to support clients' migration from the soon-to-be retired SAP Marketing Cloud. Risk-averse customers seeking to optimize current SAP investments can adopt Emarsys for

multichannel marketing while minimizing disruptions to processes that depend on other SAP products, like SAP S/4HANA.

- **Digital- and e-commerce-oriented**: SAP Emarsys directly integrates with a variety of well-known digital commerce platforms and offers a suite of e-commerce solutions tailored to e-commerce-dependent businesses. Users benefit from native connectivity to other customer-facing technologies, which facilitates a cross-functional approach to customer engagement.

- **GenAI content creator**: SAP Emarsys' in-platform GenAI content creator interface allows marketers to generate tailored content in the platform, enhancing personalization directly in email and other marketing experiences. Marketing buyers should assess SAP Emarsys for its ability to improve marketing performance through personalized content in campaigns and journeys.

Cautions

- **Multichannel marketing vision**: SAP acquired Emarsys in 2020 and announced in 2022 that it would be ending support for SAP Marketing Cloud in 2026; but for some customers, the end-of-life date is already being felt as contracts expire. Emarsys offers solid, if commonplace, multichannel marketing features, but its roadmap focuses heavily on integration with SAP's portfolio. Prospective customers seeking innovative multichannel solutions should evaluate SAP's roadmap for innovations beyond integration.

- **Platform strategy**: SAP's target buyer for Emarsys is its installed base of SAP Marketing Cloud users already invested in other offerings, like SAP S4/HANA and SAP Commerce Cloud. Marketing buyers seeking a best-of-breed MMH, rather than a larger integrated suite strategy, should evaluate Emarsys' plans independently of other SAP products to ensure its fit without SAP's enterprisewide platform strategy.

- **Prescriptive intelligence**: SAP Emarsys' prescriptive and GenAI recommendations trail other providers in this evaluation, and constrain its ability to help users maintain and optimize large numbers of journeys. Prospective buyers seeking advanced AI-enabled algorithmic capabilities should evaluate its roadmap to support always-on journeys and help teams scale customer journey orchestration.

Zeta Global

Zeta Global is a Challenger in this Magic Quadrant. Its Zeta Marketing Platform comprises Zeta Email Service Provider (ESP), Zeta Demand-Side Platform (DSP) and Zeta Customer Data Platform (CDP), offering multichannel execution across paid and owned channels. Zeta Global operates worldwide, and its typical clients include B2C marketers in retail, financial services and media. Notable platform enhancements include its AI assistant Zeta Opportunity Engine (ZOE), as well as the ability to target audiences using weather forecasts and a low-code tool for mapping external data sources. Zeta's roadmap focuses on GenAI-enabled agents for workflows, reporting and model-building enhancements.

Strengths

- **Multichannel acquisition and retention:** Zeta Marketing Platform offers marketing buyers the ability to support both acquisition and retention marketing programs in a single platform. Marketing buyers have the option to extend the platform's original strengths in email marketing to power programmatic advertising, social media marketing and some retail media networks, enhanced by its integration with digital commerce tools and point-of-sale terminals.

- **AI-enhanced customer profiles:** Zeta Global's CDP coordinates first-party marketing programs and packages multiple analytical models, such as multitouch attribution. ZOE, its AI assistant, accelerates marketing velocity by helping marketers build audiences through an interactive interface that reduces the need for analytical skills.

- **Service offerings:** Zeta Global is expanding its network of regional and global service providers, including Accenture and Merkle. In inquiries, prospective marketing buyers often look to Zeta for its own professional and agency services, including data quality and mastering, preference center design, and journey design and development. Marketing buyers seeking strategic and operational assistance can onboard as a full-services client, then transition to self-service or a mix of Zeta's and outside providers.

Cautions

- **Campaign management focus:** Zeta Global's historic focus on email marketing and programmatic advertising may prove challenging for organizations seeking to attain more strategic value from a customer journey orchestration strategy. Prescriptive intelligence features are limited and its roadmap is focused on targeting and activation.

- **Technical user adoption:** Zeta Global's email and demand-side platform are extended by its CDP, which it promotes as built with extensive AI and ML features. Zeta's users, however, are predominantly found in marketing, not analytics, data science or data engineering. Marketing buyers who seek to more deeply link marketing with enterprise IT should evaluate Zeta Marketing Platform's ability to support cross-functional AI initiatives.

- **Time to value:** Zeta Global's longer-than-average sales cycles and reliance on services suggest that marketing buyers should carefully assess projected time to value for their business cases. Zeta's foothold in large enterprises may constrain its fit for smaller, fast-moving marketers.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

Four vendors were added to this Magic Quadrant:

- Bloomreach

- Cordial

- MessageGears

- Zeta Global

Dropped

- HCLSoftware was dropped after not meeting the inclusion criterion requiring a rank among the top 30 organizations in a Customer Interest Indicator (CII) defined by Gartner for this Magic Quadrant.

- Cheetah Digital by Marigold was dropped because Gartner was unable to validate inclusion criteria for this year's Magic Quadrant.

- Redpoint Global was dropped after not meeting the inclusion criterion requiring the addition of at least 30 paying net new customers compared to 2023.

- SAS was dropped because Gartner was unable to validate inclusion criteria for this year's Magic Quadrant.

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need to meet all of the following thresholds:

Business/Financial Performance

- The vendor is required to meet one of the following (reported as constant currency):

  - At least $500 million in software license revenue from the MMH product and 1,500 customers (logos) in 2023, or

  - At least $150 million in software license revenue from the MMH product and

    - At least 350 customers (logos) in 2023 and

    - The vendor added at least 25 paying net new customers compared to 2022, or

  - At least $30 million in software license revenue in 2023 and

    - The vendor added at least 30 paying net new customers compared to 2022,

    - The vendor's combined revenue growth rate and profit margin meet or exceed 40%.

- The vendor must meet or exceed an average MMH client annual contract value (ACV) for software of $90,000.

- At least 70% of 2023 revenue for MMH is attributable to software, either SaaS/Subscription revenue or new license sales (on-premises).

Market Presence

- Show relevance to Gartner's enterprise client base with at least 60% of MMH enterprise customers under active contract and headquartered in North America or EMEA (combined). Revenue recognition must be assigned to the geographic region in which the account's contracts or purchase orders are signed. Do not reassign revenue from child accounts to a parent account, such as from a regional account in APAC to a controlling entity in NA.

- Rank among the top 30 organizations in a Customer Interest Indicator (CII) defined by Gartner for this Magic Quadrant. Noninclusion due to the CII should not reflect negatively on vendors. Gartner methodology limits the number of vendors that can appear in the Magic Quadrant to 20. Data inputs used in the CII include the following measures, among others:

  - Gartner customer inquiry and search volume and trend data.

  - Google search volume and website traffic analysis.

  - Frequency of mentions as a competitor to other cloud MMH vendors in reviews on Gartner's Peer Insights forum during the year ending December 2023.

  - Providers must also have met a minimum threshold of being mentioned by end users in at least one client inquiry in 2023 to be included in the CII ranking for this Magic Quadrant.

- Demonstrated sales and customer support presence in a minimum of two of the following four regions: North America, Latin America, EMEA, Asia/Pacific. "Presence" is defined as regional coverage for a minimum of three of the seven following industries:

  - Banking, financial services and insurance

  - Healthcare (including providers, pharma, and life sciences)

  - Manufacturing

  - Media

  - Retail

  - Services

  - Transportation

- An ecosystem of partners that can provide technology extensions or services such as system integration services, third-party applications, digital agency services, or consulting and implementation services serving the above geographic areas.

MMH Product or Solution Functionality

Providers must show proven ability to deliver multichannel marketing hub capabilities as defined below:

Essential Functionality

All vendors must provide:

- **Customer profile management**: MMHs need persistent, unified customer profiles that integrate multiple customer data sources and enable marketing users to execute multichannel campaigns and event-based journeys across channels for first-party marketing, customer engagement and sales. MMH products may offer native profile management or a solution delivered with a stand-alone CDP. Products should enable marketers to activate their own first-party data and utilize customer data from second and third-party sources. This functionality includes:

  - **Data model management** — Included solutions must offer a configurable data model that can be managed via UX by nontechnical marketing users, supporting the integration of customer, behavioral and/or transactional data from a variety of data sources. Providers can offer advanced customization through professional services support or partnerships.

  - **Packaged integration with other applications** — These capabilities support bidirectional integration with adjacent technologies that support multichannel marketing, including CRM/sales force automation (SFA) applications, call/contact center applications and digital commerce platforms. The functionality supports integration with digital asset management (DAM), product information management (PIM), and content management for tailoring and optimizing customer and prospect interactions.

- Vendors must support integration with adjacent solutions in a minimum of five of the following categories as a standard, documented capability:

  - Cloud data platforms

  - CRM/sales force automation

  - CRM/customer experience management

  - Digital commerce

  - Personalization engines

  - Marketing analytics and BI dashboards

  - Content management

  - Digital asset management, product information management or content marketing platforms

  - Identity resolution services

- **Identity resolution and matching:** Solution must support deterministic, multikey identity resolution capabilities to connect the activities of an individual customer or prospect across touchpoints, devices and data sources. Keys and device identifiers can be explicitly supplied (deterministic) or inferred statistically from observable characteristics (probabilistic).

- **Data enrichment:** Solutions must offer the ability to onboard and match first-party data with second- and third-party audience insights. Data enrichment capabilities may come through tags as well as preconfigured integrations with common marketing technologies, data partners and analytics tools.

- **Consent management:** Solutions must provide native functionality for consent management and auditing capabilities, such as consent collection, permission/preference tracking and opt-in management.

- **Journey and campaign management:** These capabilities support workflows that enable multidisciplinary teams to plan, design and iterate/version both event-based journeys and targeted multichannel campaigns. These workflows should enable users to create targets and triggers, personalize messages, create next-best-action logic or decisions, conduct experiments, and run audit or approval processes as well as customized performance reports.

- **Multichannel execution and measurement:** Multichannel marketing is the ability to implement a single strategy across multiple channels, thus maximizing opportunities to interact with and engage prospective or existing customers. Vendors must be able to orchestrate all basic channels and five advanced channels within the same campaign. Emphasis is given to native channel support over direct connections with third-party applications, except where noted. Basic channels/endpoints include:

  - Email marketing (creation, send and response tracking)

  - Carrier-based mobile messaging (SMS or MMS)

  - Walled garden destinations for advertising (Google and Meta)

Advanced channels/endpoints include:

- Advanced mobile, including push notifications, in-app messaging, Rich Communication Services (RCS) or other app-based experience (e.g., Instagram/TikTok-like stories)

- Web landing pages, website personalization, web push or personalized search

- Organic social media (Facebook, YouTube, Instagram, TikTok, etc.)

- Direct mail (incorporation and management of direct mail campaigns; native fulfillment not required)

- Paid media, including open programmatic advertising (e.g., DSP/DMP integration), retargeting, paid social (Facebook, YouTube, Instagram, TikTok, etc.) and retail media networks (Amazon

Ads, Walmart Connect, Target Roundel)

- Consumer messaging platforms (Facebook Messenger, WhatsApp, Apple Messages for Business, WeChat, etc.)

- Other services (chatbots, webhooks/APIs, digital signage, kiosks or point-of-sale terminals)

- **Advanced data management**: Beyond essential profile management, products or solutions should:

  - Enable one or more advanced data capabilities (such as enabling multichannel marketers to collect and integrate web or mobile data).

  - Manage other data entities (such as product catalogs for personalized offers).

  - Perform data transformation operations.

  - Support virtual data access (zero copy integration) in multiple cloud data platforms.

- **Analytics and AI/ML**: MMHs should support a variety of native analytical capabilities — using rules, AI or ML techniques — that help marketers enhance targeting and personalization as well as optimize overall program performance through segmentation, predictive models, customer journey analytics or other analysis types.

- **Application management**: MMHs should enable administrators or other management roles with an appropriate UX to manage, govern or customize multidisciplinary workflows through user management, permissions and process control. These include policy and compliance management (data activation governance, contact frequency policies, SOC 2, HIPAA, etc.), organizational (distinct business units) and AI/ML governance capabilities (generative model and prompt management).

Advanced Functionality

In addition, vendors should support at least two advanced multichannel marketing capabilities. There is increasing market expectation that vendors will offer AI-enabled functionality, such as prescriptive intelligence, or advanced collaboration capabilities to deliver better results from strategic martech investments.

Advanced MMH capabilities include:

- **Prescriptive intelligence and decisioning**: These capabilities provide automated guidance to help marketers both (a) identify and maintain underperforming journeys and journey assets (triggers, branches, experiments, offers, etc.) as well as, (b) prioritize and optimize the overall mix of journeys and campaigns to attain key objectives (next best actions).

- **Campaign ideation**: These GenAI-enabled capabilities help marketers and marketing leaders interactively identify and develop new ideas for campaigns and journeys through ad hoc, text-

based queries. Use cases include campaign brief generation, audience exploration, journey ideation, design of experiments and design-related recommendations.

- **Campaign content and code generation:** These capabilities leverage GenAI to help multichannel marketing users create or manage content that is unique to multichannel marketing (use cases other than integration with DAMs or PIMs). Examples could include personalized creative variants within a campaign or journey, real-time/contextual content, and code-based elements (like surveys and landing pages).

- **Collaboration and work management:** These capabilities enable multidisciplinary teams of marketers and other roles (IT, analytics, data, product managers, etc.) to manage and optimize the activities and work of multichannel marketing, using collaboration platforms, through capabilities like native or integrated project and task management, budget, resource management and marketing calendar management.

- **Consent and preference management:** These advanced consent management capabilities enable the MMH to act as an enterprisewide consent and preference solution — either natively or via integrated third-party or white-labeled service — for various use cases. These could include consent collection, multidimensional preference management and synchronization across integrated systems.

- **Digital commerce and content:** These capabilities enable retail, D2C and other commerce-focused marketers with richer recommendation and promotion algorithms, customer review management, loyalty program management, and user-generated content tools.

Evaluation Criteria

Ability to Execute

We evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable a marketing team's performance to be competitive, efficient and effective, and positively impact revenue, retention and reputation within Gartner's view of the market. With wide-ranging functional, support and service requirements, these are the important aspects of a vendor's Ability to Execute:

- **Product or service** — We evaluate a vendor's Ability to Execute on the essential and advanced functionalities listed earlier in the Inclusion and Exclusion Criteria section, as well as evidence of a consistent product release/update cadence indicating the overall health of the vendor's MMH solution.

- **Overall viability** — We evaluate the health of the vendor's line of business that offers the multichannel marketing solution(s). We also assess the vendor's history of success and development of world-class MMHs and its continued commitment to advancing the state of the art in the company's product portfolio.

- **Sales execution/pricing** — We evaluate a vendor's responsiveness to customer or prospect requests for information, RFI/RFP activities and presales technical support. We also evaluate a vendor's execution during contract negotiation, RFP or quote responses, pricing and negotiation

activities, and the overall effectiveness of the direct and indirect sales and sales management organization. We assess the vendor's cost and pricing competitiveness as they relate to competitors with comparable capabilities. This includes the published list price of the vendor's product (licensed or SaaS) and any optional modules needed to meet the minimum product requirements defined above. Also included are annual maintenance fees (if any) and any required services, training, implementation fees, customization or related services.

- **Market responsiveness/record** — We evaluate a vendor's success in creating and meeting a consistent demand for its product, measured in continuing client wins and use among its installed base. We also assess a vendor's strategy for directing resources, skills and offerings to meet the specific needs of geographic regions outside the vendor's "home" region — directly or through partners, channels and subsidiaries as appropriate for that geography and market. Finally, we look for a vendor's demonstrated investment of resources in product development in new areas directly related or adjacent to multichannel marketing in response to market demand or need, along with continued agility in responding to a disruptive business climate.

- **Marketing execution** — We evaluate a vendor's Ability to Execute tactical and strategic marketing campaigns that support a growing customer base, as well as the ability to create and extend its brand as an MMH vendor and visionary in the space. We also look for evidence of a vendor's overall momentum and perceived multichannel marketing focus and presence in the market, as well as continued agility in responding to a business climate characterized by continued disruption.

- **Customer experience** — We evaluate the availability and viability of a vendor's internal customer service and support capabilities, including support resources, systems, policy and global scope. We also assess the accessibility of a vendor's external resources. This includes partnerships with global systems integrators, consulting organizations and technology partnerships, and related internal or external resources such as third-party tools or consulting methodologies. Also included are customer-led social networking initiatives, the availability of user groups and SLAs. Finally, we evaluate the perceived ease of use of a vendor's MMH solution.

- **Operations** — Our measurement of operations focuses on the provider's ability to meet contracted goals and service level commitment for their clients. We evaluate the quality of a vendor's organizational structure, average turnover rate of employees, the breadth and depth of internal resources as well as any reductions in force or layoffs in the last 18 months. We also assess providers' readiness to scale planned strategic initiatives.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High

Evaluation Criteria ↓	Weighting ↓
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	Medium
Operations	Low

Source: Gartner (October 2024)

Completeness of Vision

We evaluate vendors on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs, and competitive forces and how well they map to Gartner's view of the market. Vendors that do the following exhibit good Completeness of Vision:

- Demonstrate a clear understanding of marketing organizations' needs.

- Align product development to current and future marketer requirements.

- Set an update cadence that can consistently deliver differentiated functionality against those evolving requirements.

- Support a wide range of use cases.

- Exhibit technological innovation in their products.

Specifically, Gartner assesses vendors' Completeness of Vision in the MMH market by using the following criteria:

- **Market understanding** — We evaluate a vendor's value proposition in the market, as well as how effective its solution is at reaching the marketing buying center for companies purchasing multichannel marketing solutions. We also assess the vendor's comprehensive vision of external market forces (e.g., consumer trends, the changing regulatory landscape).

- **Marketing strategy** — We evaluate a vendor's effectiveness in accentuating any unique functionality or value proposition, as well as a vendor's ability to effectively convey differentiation and vision via market event presence, including webinars and thought leadership programs and overall visibility. We also assess how well a vendor articulates continued multichannel marketing leadership in the context of ongoing business disruption due to COVID-19 and other factors.

- **Sales strategy** — We evaluate a vendor's overall strategy in using direct and indirect sales channels to sell its MMH solution. We also look at a vendor's marketing, customer support and service, or communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies and services of the customer base. Finally, we assess a vendor's depth of demonstrated system integration, technology, application, strategy consulting and distribution partnerships.

- **Offering (product) strategy** — We evaluate a vendor's approach to the essential and advanced functionalities essential and advanced functionalities noted earlier in the Inclusion and Exclusion Criteria section, as well as a vendor's consistent product release/update cadence indicating the overall health of the MMH solution.

- **Business model** — We evaluate the alignment of a vendor's go-to-market and sales strategies for particular industries, geographies and delivery models. We also look at a vendor's product strategy that supports the business model, as well as its product license model (such as SaaS versus a one-time license fee) that effectively supports the targeted market.

- **Vertical/industry strategy** — We evaluate a vendor's effectiveness in targeting the current market, as well as its ability to direct resources, skills and investment to meet the specific needs of new market segments, users or vertical industry groups. We also assess the degree to which a vendor's global strategy affects the company's ability to meet the needs of a global customer base.

- **Innovation** — We look for a vendor's investment of financial, management technology resources, expertise or capital in the following areas intended to expand the scope, capabilities or global presence of the company and its products for its customers:

  - Product development in new areas directly related or adjacent to multichannel marketing

  - Sales and support infrastructure

  - Third-party and partner relationships

  - Mergers and acquisitions

- **Geographic strategy —** We assess providers' ability to sell and service multichannel marketing clients in regional markets. We evaluate providers' regional growth rates as well as their strategy for direct and indirect sales through local service providers. Given the importance of regional consumer privacy and data management regulations, we also evaluate providers' strategies and features for privacy-related innovations.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	High

Source: Gartner (October 2024)

Quadrant Descriptions

Leaders

Leaders demonstrate broad support for all MMH functional capabilities and consistently meet customer needs across the four core multichannel marketing use cases (implementation and maintenance, journey building and execution, multichannel optimization and prioritization,

customer journey analysis). They have high market visibility; high market penetration; strong market momentum; and a clear, long-term strategic vision and roadmap for growing their MMH business. Leaders have also demonstrated success in selling to a range of new customers across industries and geographies.

Challengers

Challengers have a developing understanding of the MMH market and basic and emerging functions. They have strengths in one or more critical use cases, such as their ability to orchestrate campaign workflows with sophisticated event triggers and the strength of their predictive decision-making support of campaign creation and optimization. They focus on established clients' needs for multichannel marketing functions and strategic direction, rather than on setting a visionary pace with potential requirements. Vendors in this quadrant distinguish themselves for the level of support and partnership they provide to customers as complements to their MMH solutions.

Visionaries

Visionaries excel in offering emerging functionality desired by marketers — such as customer profile management, personalization or real-time decisioning — that enhances digital marketing leaders' ability to execute complex multichannel marketing programs. Visionaries may set a strategic direction or demonstrate specific innovative capabilities in one or more functional areas (such as advanced multichannel marketing or advanced analytics functionality) that the market will eventually adopt. Although Visionaries show promise in multichannel marketing, they may be lacking in some aspects of their offerings, service and support resources, and/or business and partner ecosystems, which impairs their execution. These gaps similarly limit their market presence and growth potential.

Niche Players

Niche Players serve specific needs in the MMH space. They may be focused on a particular function, process (for example, campaign orchestration), geography or industry. MMH vendors in this quadrant may lack a broader set of multichannel marketing capabilities (such as advanced analytics). Similarly, their customers may adopt MMH solutions for a subset of their total capabilities (such as email marketing). Niche Players may also lack execution potential (such as sufficient resources or a fully developed market strategy), resulting in more limited market visibility and market presence relative to vendors in other quadrants.

Context

MMHs hold wide appeal to marketers because they enable critical digital marketing capabilities, like campaign management and customer journey orchestration. Marketers invest in MMHs to improve outcomes like revenue, customer engagement, loyalty and lifetime value. MMHs are similar to email platforms, mobile marketing platforms and B2B marketing automation platforms. They are often used together with CDPs, cloud data platforms, asset or content management tools and personalization engines, and complement other software offerings, such as adtech or sales, service or commerce CRM solutions. At a minimum, MMHs must enable marketers to use data to deploy personalized media across addressable channels to known individuals.

MMHs are foundational technologies for multichannel marketing and journey orchestration, adopted by 69% of marketing organizations, as measured in the 2023 Gartner Marketing Technology Survey. Yet only 17% of marketers use most or all of their multichannel marketing hub's features and functions. Worse, the 2023 Gartner Multichannel Marketing Survey showed only 20% of organizations have added emerging channels to their programs, while the rest may take as long as two years to do so. Marketers' limited use of their MMHs and their scant impact on channel expansion undermines many business cases premised on tech-centric ROI models. MMH providers should address this utilization-to-value gap, or else the intense pressure on chief marketing officers' martech budgets could loosen this application's long-held place in martech stacks.

Transitioning from campaigns to journey orchestration remains a top priority for many organizations with 47% of marketing leaders saying they will increase martech investments to support it. Today precise targeting and offer selection drive multichannel success; in the future, competitive advantage may come from the ability to generate and prioritize the best individual journeys through rich and engaging content deployed throughout the customer's end-to-end journey.

To help marketing leaders identify solutions most suited to solving their own transitions to orchestration, this research identifies providers for their ability to manage the transition. In evaluating each provider's current ability to deliver value, we gave high weight to profile management, campaign management, and multichannel execution. To evaluate providers' visions and future value, we gave high weight to prescriptive intelligence, GenAI-enabled journey building, and GenAI-enabled content and creative personalization. Providers that can help marketers attain current and future results through realistic roadmaps, effective go-to-market organizations, broad partner ecosystems and clear organizational viability received more favorable evaluations.

Readers should carefully factor in Gartner's point of view on current and future value of MMH solutions and develop their own evaluation criteria for providers' vision or execution abilities. The Magic Quadrant methodology factors in a range of criteria in determining position, as shown by the extensive Evaluation Criteria section.

As you build your business case, use cases and RFPs, factor your current needs for multichannel campaign management and your estimate of providers' ability to resolve challenges that hamper marketers' adoption and use of advanced orchestration capabilities in campaigns and journeys. Ensure your organization develops a comprehensive and agile change management plan that addresses both the implementation and adoption of your MMH's features as well as the ongoing education and enablement of its end users. Assess your MMH solution not only on key functionality, but also its ability to increase marketing velocity and time to value. Consider how each providers' product development, customer success organizations and ecosystem of technology, agency and service providers can help you implement, develop and optimize your ability to attain results from your ongoing MMH investment.

Market Overview

Technology markets have long been characterized by cyclic patterns of growth, consolidation and disruption. In recent years, the MMH market has looked increasingly settled, if a little staid. In the 2023 Gartner Marketing Technology survey, MMH solutions had become so deeply established that only 6% of marketers say they would not consider one. As the market saturated, net new deployments fell and a handful of providers dominated the enterprise market.

In 2024, the market feels more dynamic than in many years. Customer data platforms, which are often used to supplement MMHs, have transformed the market, with two strong cohorts emerging: enterprise CRM platforms and emerging customer engagement specialists. GenAI increasingly differentiates providers, helping users generate even more personalized experiences at the moment of interaction. Some also added the ability to generate entire multistep journeys, complete with generated media. More providers have added prescriptive intelligence to help marketers manage the growing maintenance burden of always-on journeys, but only a few offer truly advanced and easy-to-use features. Finally, composability entered the MMH market, with a growing number of providers offering integration with the data sharing and federated compute capabilities found in data platforms like Snowflake.

Platforms Emerge From Enterprise Application Providers' CRM Portfolios

For more than a decade, marketers have turned to CDPs to enhance their MMHs, extending MMHs' ability to leverage data of different types (e.g., streaming data from mobile devices or customer service data). Large enterprise application providers (EAP), like Adobe and Salesforce, initially offered CDPs to marketing buyers as a way to extend the older data structures and analytics of their MMHs. More recently, EAPs are positioning CDPs as the foundation of their platform strategies, vertically integrating data management, enterprise applications and AI offerings in a unified solution architecture. This repositioning is significant for its downstream impact on multichannel marketing buyers. In the 2023 Marketing Technology Survey, 78% of respondents said they must select their solutions from preapproved vendors and platforms. Multichannel marketers should anticipate that choice of MMH provider will be constrained by their enterprise's choice of strategic technology partner. MarOps leaders should also expect those constraints to spread to other customer data-intensive martech tools, like personalization engines and marketing automation platforms.

This "platformization" of martech is not without benefit. On a much larger scale, EAPs increasingly resemble the fast-growing segment of customer engagement platforms, which bundle advanced data management features that rival those found in CDPs. EAPs' platform strategies could improve MMH workflows, as CEP's have been shown to do, by streamlining the work of campaign management and journey orchestration, blending multiple workstreams in a holistic offering. Adobe and Salesforce stand out for their aggressive embrace of this new architecture. Multichannel marketers on these tools stand to benefit from simplification just as the CEPs' customers have.

Platform modernization, however, comes at a price, and not only in contracted costs. Longtime marketing users have struggled with EAPs' fluctuating roadmaps for older martech products. In client inquiries, marketing buyers complain they feel forced to adopt these new architectures and

compelled to navigate the rapids of provider-induced organizational transformation. For them, the pain of platformization isn't only the sunk costs of the old or the spiraling cost of the new. They fear the second-order impacts their providers' transformations foist on their change-weary organizations. Marketers need reskilling or upskilling on the new tools. Organizational structures and their interdependent workflows will need to evolve. The scale of transformation required, the surging cost of the platforms and their waning value to marketers have shaken loose formerly steadfast customers. Should the trend continue, its impact may fully arrive in two to three years, when multiyear contracts expire.

Customer Engagement Platforms Strengthen as an Alternative to EAP's Platforms

CEP providers include Bloomreach, Braze, Cordial, Insider, Iterable and Optimove. Customer engagement platform providers showed remarkable growth in the last year, particularly in North America and Europe. These tools embed CDP-like capabilities within their MMH offerings, including the ability to stream and process data needed for cross-channel journeys or mobile experiences. Providers offer buyers the ability to simplify martech stacks and accelerate go-to-market operations through high-frequency cadence and event-triggered engagement. CEP providers also aim to offer much stronger benefits than older MMHs, such as organizational agility, streamlined martech governance and greater cross-functional collaboration.

GenAI Capabilities Strengthen

MMH providers further strengthened GenAI capabilities in the last year, primarily in generating content for messaging. Providers showed the ability to use GenAI as a creative assistant, helping users create variations of text and imagery for experiments or to personalize multichannel messaging. In the last year, providers also added the ability for GenAI to generate target segments or design and assemble journeys. Marketers who seek to accelerate journey operations should investigate GenAI capabilities for their impact on MMH performance and productivity. GenAI enhancements could not only help build deeper customer relationships through tailored experiences but also potentially accelerate campaign production times, enabling businesses to gain competitive advantage from agile marketing. Marketing buyers often incorporate POC tests to help make the business case when adding or replacing a martech. This is even more important when assessing the value of GenAI in MMH. In POC tests, marketing buyers should use measures like campaign cycle time — how much time is required to bring a new journey to market — along with products' impact on marketing performance to select providers for generative journey building.

Prescriptive Intelligence Streamlines Journey Orchestration

Journey orchestration requires a shift in what multichannel marketers value and how they work. Journeys differ from campaigns by their persistence: Journeys are "always on," waiting for the right signal, whereas campaigns expire once executed. More providers have enhanced opportunity detection and prescriptive AI, helping stretched multichannel marketing teams maintain existing journeys and prioritize the right new journeys for development.

Prescriptive intelligence benefited greatly from GenAI capabilities in the last year. Providers added enhanced opportunity detection by adding natural language, AI assistants, which enable marketers to refine the recommendations. Providers also added the ability to generate new messages or whole journeys in response to detected opportunities, which could dramatically shorten production times for any new journeys created from the opportunities. Prospects are advised to review providers' prescriptive AI capabilities to see how this emerging capability can help teams scale journey operations.

Composability Comes to MMH

Composability is a term most commonly discussed among enterprise architects, referring to design characteristics needed to help govern and orchestrate thousands of enterprise "modules" or applications. Marketing buyers have of late asked about composable CDPs, which break apart CDP features into modules that can be purchased individually, like data collection and reverse extract, transform and load (ETL). Marketing buyers are keenly interested in their potential cost savings over packaged CDPs, since they leverage a client's existing cloud data platform for storage and some data processing.

In 2024, we observed some providers using composability as a differentiator in MMH product positioning. For example, large EAPs have and continue to invest heavily in integrating cloud data providers' data-sharing features to support audience creation and personalization without moving data to their CDPs. Customer engagement platforms report rising numbers of technical users, like data engineers, who do compose new processes or applications around those platforms. While we see evidence that buyers are trending toward composable architectures, some providers' claims of composability aren't new. For example, APIs and integrations with enterprise data systems were long ago commonplace features in MMHs sought by marketing buyers. At this stage, it's unclear if composability means much more to marketing buyers than a way to signify the importance of advanced data management as a critical capability. However, marketing buyers would still be wise to consider composability. IT organizations are increasingly centralizing customer data management and helping build journeys. These roles frequently ask about composability in client inquiries.

If buyers do come to view composability in MMH as valuable, it may arise more from economics than pure technical appeal. Providers could use composability to position their products against legacy MMHs in two ways: by offering disruptive pricing or by arbitraging, packaging advanced features at lower price points.

First, providers could significantly lower prices by outsourcing analytics and storage to the underlying data platform, like the composable CDPs do. Frustrated at steeply rising data management costs, marketers might turn to a composable MMH to both reduce martech spend and deliver a step change in MMH ROI.

Second, providers may instead attempt MMH disruption through arbitrage: Providers could maintain current price points, trading the cost savings of composability to bundle expensive new AI features, like prescriptive intelligence and GenAI-enabled journey orchestration. Journey

building today is slow, personalized content is expensive to produce, and the resource burden of sustaining orchestration snowballs as the number of journeys rises. Marketing leaders continue to prioritize orchestration, but its operational complexity drags on its feasible application. For them, composability's value might center elsewhere, say, by unlocking GenAI's potential to accelerate marketing velocity — more personalized journeys, produced more quickly, leading to higher return on engagement. For providers, value would lie where it always has in the MMH market — more multichannel execution.

Buzzword or breakthrough, composability's present day benefit to multichannel marketing is nascent, and marketing buyers should proceed cautiously when evaluating providers' claims of business value from it. Partner closely with IT to assess technical advantages and conduct POCs to measure its value to the business in specific use cases.

Evidence

2023 Gartner Multichannel Marketing Survey. This survey was conducted to determine best practices for maximizing multichannel marketing investments in response to evolving customer journeys in a fluid marketing environment. It was conducted online from November through December 2022. In total, 397 respondents were surveyed in their native languages across North America (n = 201), Western Europe (n = 161) and the Nordics (n = 35). Qualifying organizations reported enterprisewide annual revenue for FY21 of at least $100 million, with 83% of the respondents coming from organizations with $1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 61), manufacturing (n = 58), consumer products (n = 46), retail (n = 45), travel and hospitality (n = 45), healthcare (n = 44), pharmaceuticals (n = 35), media (n = 33), and IT and business services (n = 30). All respondents were senior leaders who manage multiple marketing channels or were responsible for the execution of their organizations' multichannel marketing strategies. Eighty-five percent of respondents were aligned with the marketing function, 9% to brand management, and 7% to sales or other business units.

Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

2023 Gartner Marketing Technology Survey. This survey aimed to investigate the state of technology acquisition, adoption and use, including best practices for managing the technology stack, specific technologies in use and the degree of their adoption. It was conducted online from the end of May through June 2023. In total, 405 respondents were surveyed in their native languages across North America (n = 200), Western Europe (n = 173) and the Nordics (n = 32). Qualifying organizations reported enterprisewide annual revenue for FY22 of at least $100 million, with 80% of the respondents coming from organizations with $1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 39), insurance (n = 39), manufacturing (n = 41), consumer products (n = 38), retail (n = 39), travel and hospitality (n = 34), healthcare (n = 38), pharmaceuticals (n = 31), media (n = 34), tech products (n = 34), and IT and business services (n = 38). The respondents were required to be senior decision makers, where the majority of their daily responsibilities mostly aligned with either business- or IT-focused marketing. Sixty-two percent of respondents were aligned with the marketing function, 18% with

brand management, 11% with product marketing and management, 9% with customer experience, and 2% with IT or other functions. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Gartner Peer Insights reviews for multichannel marketing hubs: We considered reviews posted from 1 January 2023 through 14 August 2024.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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