Magic Quadrant for Multichannel Marketing Hubs

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By Audrey Brosnan, Tia Smart, **and 5 more**

In 2025, AI and unified data are fueling significant change in multichannel marketing hubs. CMOs must weigh new opportunities for impact against ongoing uncertainty and risks. Use this research to inform profitable, competitive strategies and guide martech investment decisions.

Market Definition/Description

Gartner defines multichannel marketing hubs (MMHs) as software applications, primarily delivered as SaaS, that orchestrate personalized campaigns and event-driven customer journeys across marketing channels. These applications leverage customer data, predictive models and real-time insights to optimize the timing, channel and content of interactions. MMHs apply advanced analytics, AI and prescriptive intelligence to help marketing and technical teams manage the end-to-end life cycle of customer journeys. Although MMHs overlap with customer data platforms (CDPs) and personalization engines, their primary focus is enabling marketing users to manage large-scale consumer interactions, particularly in owned media channels such as email and app push.

Multichannel marketing hubs empower marketers to deliver personalized media and orchestrate customer journeys, thus driving revenue, engagement and loyalty. These SaaS applications unify customer data, predictive insights and real-time decision making to optimize interactions across digital channels. MMHs enable multidisciplinary teams to manage campaigns and event-driven journeys via advanced analytics, artificial intelligence/machine learning (AI/ML) and prescriptive intelligence.

As AI and generative AI (GenAI) technologies evolve, MMHs are helping teams dramatically expand the number, variety and quality of customer journeys, enabling greater personalization at scale. Advanced capabilities, such as campaign ideation, allow marketers to collaborate with AI agents to quickly produce near-complete journeys, including:

- Campaign briefs

- Audience segmentation

- Multistep journey design

- Media channels

- Personalized content coded for individual channels

By automating these traditionally human-bound tasks and pairing them with prescriptive journey optimization, MMHs enable marketers to focus on strategy, creativity, efficient production, and innovative practices or experiences.

Buyers value MMHs for their ability to orchestrate multichannel experiences and accelerate time to market. Organizations increasingly favor MMHs that:

- Ease journey maintenance by optimizing underperforming journeys.

- Speed journey development by identifying audience segments or designing and coding media.

These emerging capabilities enhance agility and performance, helping marketers stay competitive and increasing the tool's value to the organization.

Mandatory Features

- **Multichannel execution and measurement:** Enables deployment and measurement of personalized messages across digital channels, such as email, mobile messaging and advertising. This feature includes integrated tools for performance tracking and reporting to optimize engagement.

- **Data integration and management:** Enables users to integrate customer data or other data objects (audiences, product catalogs, etc.). Specific functions may include APIs and packaged integrations, profile management, data transformation, advanced data (aka zero-copy) access to cloud data warehouses, and support for entities, such as product catalogs, that enable seamless data activation and personalized offers.
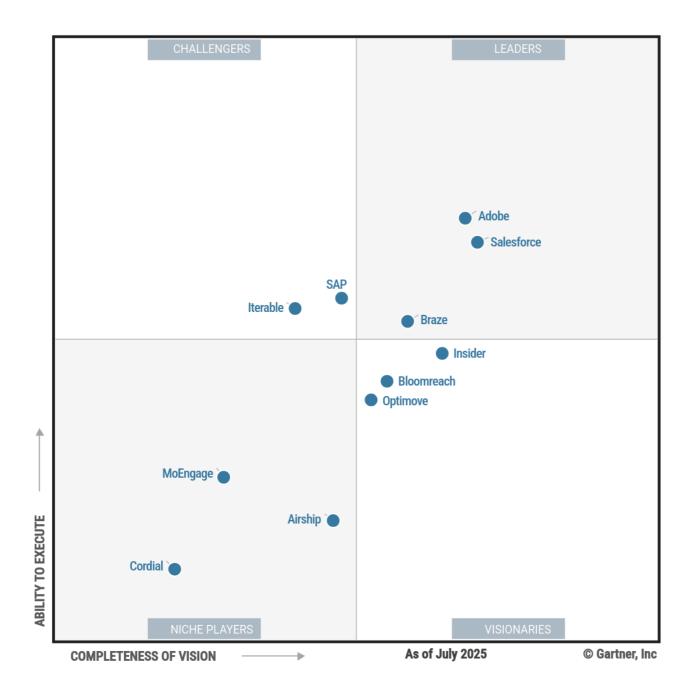
- **Campaign and journey management:** Provides user-friendly tools for campaign and journey design, testing, versioning and reporting. This feature orchestrates workflows to help marketers manage the life cycle of campaigns and journeys, from planning to archiving.

- **Analytics and reporting:** Offers capabilities such as segmentation, predictive modeling and customer journey analytics. These tools enhance targeting, personalization and overall program optimization. MMHs bundle features for reports and dashboards to help users understand and communicate campaign, channel and journey performance.

- **Consent and preference management:** Provides native or integrated tools for managing customer preferences, opt-ins, permissions and compliance audits. This feature ensures adherence to global corporate policies or regional regulations while fostering customer trust.

- **Application management:** Delivers tools for user and permission management, regulatory compliance (e.g., Service Organization Control [SOC] 2), and governance. This feature includes critical functions, such as global frequency capping and messaging policy enforcement, that ensure secure and scalable operations.

Common Features

- **Advanced multichannel execution:** Expands execution capabilities to paid and earned channels to improve the performance of journeys across first- and third-party touchpoints. Examples include integration with demand-side platforms, paid social media campaigns, retail media integration, and integration with identity resolution or data enrichment offers.

- **Campaign ideation and content generation:** Features GenAI-powered tools for producing campaign briefs, including audience segmentation, journey design and media recommendations. This feature supports content creation with tools for personalized variants, real-time assets and interactive elements, such as surveys and landing pages.

- **Prescriptive and proactive AI decision making and automation:** Combines AI-driven anomaly detection and journey prioritization with GenAI-powered automation. This feature automates life cycle tasks, such as journey maintenance and optimization, while providing actionable recommendations or taking actions to improve campaign performance.

- **Collaboration and work management:** Provides tools for project management, budgeting, resource allocation and calendar optimization. This feature enhances team collaboration and workflow efficiency for more seamless marketing operations. Tools may also provide packaged integrations and features from third-party work management applications.

- **Digital commerce and service integration:** Offers advanced integrations for commerce and service scenarios, including ERP integrations for real-time inventory and pricing, CRM case management, and two-way communication. This feature supports audience suppression for service exceptions and predictive recommendations for cross-sell or upsell opportunities.

- **Two-way conversational messaging:** Enables customer engagement through voice-triggered journeys, chatbots and agent-based interfaces. This feature includes seamless transition to human agents, proactive customer engagement and omnichannel messaging support for consistent communication.

- **Utilization and efficiency metrics:** Provides reporting and tailored suggestions to help organizations increase product usage, performance and operational efficiency. This feature includes dashboards for reporting on product consumption and spend efficiency. Some providers also include features to govern bundled GenAI features and minimize biases. Others include benchmarking tools to evaluate performance against industry peers.

- **Hyperlocal- and external-event-triggered functions:** Supports real-time adjustments to campaigns based on local and dynamic conditions. This feature includes geotargeted campaigns tailored to weather or events. It also includes tools for scaling responses to major triggers, such as holidays or breaking news.

Magic Quadrant

Figure 1. Magic Quadrant for Multichannel Marketing Hubs

CHALLENGERS / LEADERS / NICHE PLAYERS / VISIONARIES quadrant chart

- Adobe
- Salesforce
- SAP
- Iterable
- Braze
- Insider
- Bloomreach
- Optimove
- MoEngage
- Airship
- Cordial

ABILITY TO EXECUTE

COMPLETENESS OF VISION

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Vendor Strengths and Cautions

Adobe

Adobe is a Leader in this Magic Quadrant. Its main MMH, Adobe Journey Optimizer, is supported by Adobe Real-Time CDP and Adobe Customer Journey Analytics. Adobe's global reach and partner network are complemented by add-ons like Healthcare Shield for HIPAA-Ready Services. Journey Optimizer's integrated data management and analytics leverage Adobe Experience Platform, providing access to broader journey building innovations such as AI Assistant and the upcoming Agent Orchestrator. The roadmap includes enhanced real-

time personalization, including the Experimentation Accelerator, which recommends high-performing experiments based on past tests and trends for faster time to value.

Strengths

- **Scalable orchestration architecture:** Journey Optimizer offers unified, real-time data management, journey orchestration and analytics. Add-ons Real-Time CDP and Customer Journey Analytics bring advanced data collaboration and longitudinal analysis. Its globally distributed architecture supports low-latency audience resolution and real-time and batch campaigns to design, adapt and scale hybrid journeys.

- **Audiences and personalization:** Marketers can compose and manage audiences from diverse data sources. Journey Optimizer Prime and Ultimate users with the add-on Federated Audience Composition can directly activate data from data warehouses. Generative AI (GenAI) enhances its segmentation engine with prompt-based creation. Blended rule-based and AI-driven decisioning in Journey Optimizer Ultimate supports next best action and real-time personalization.

- **Global ecosystem/industry engagement:** Adobe's extensive partner network and targeted industry initiatives provide engagement through vertical-specific events, webinars and collaborative workshops. Industry strategists provide benchmarking, knowledge sharing and tailored value assessments to help customers adopt best practices and maximize value.

Cautions

- **Cost and pricing complexity:** Adobe MMH buyers report concerns about costs, driven by complex, consumption-based pricing metrics that span multiple products, such as credits, addressable profiles and data rows. Opaque connections between packages, tiers and pricing metrics risks obscuring total costs and value of Adobe Journey Optimizer.

- **Platform integration and composability consideration:** Existing customers with complex batch multichannel requirements will likely need Adobe Campaign to achieve the full scope of MMH capabilities as defined by Gartner. Since March 2025, prospective buyers have had the option to forgo Campaign, but they should carefully evaluate Adobe product interdependencies to ensure that their priorities align with Adobe's solution.

- **Prescriptive optimization:** Adobe's optimization model centers on skilled users leveraging analytics to identify and act on opportunities, not automated prescriptive

recommendations. Buyers wanting scalable, prescriptive guidance may find this manual, expert-dependent approach inefficient to meeting demands at scale.

Airship

Airship is a Niche Player in this Magic Quadrant. Its Airship Experience Platform's (AXP) cross-channel customer experiences for clients focuses on app-and web-first engagement. It mostly serves North America and EMEA, with a growing partner ecosystem and recent Asia/Pacific (APAC) expansion. AXP targets midsize to large B2C enterprises across diverse industries, offering advanced mobile messaging and user-friendly tools for app and web teams. Recent innovations include AI-assisted journey creation. The roadmap prioritizes deeper AI-assisted content creation, real-time performance monitoring and data warehouse interoperability.

Strengths

- **Mobile-first multichannel execution:** AXP is purpose-built for mobile-first customer engagement, delivering native app and web experiences through a unified architecture and supporting a range of advanced channels, including Apple Live Activities and digital wallet passes. This expertise is integrated into a cross-channel framework, enabling brands to orchestrate seamless experiences across mobile, web and app environments.

- **User experience and journey building:** Airship emphasizes usability with intuitive tools for journey design and campaign management. Innovations such as AI-assisted journey generation, embedded content for dynamic in-app personalization and Web Scenes for unified content creation simplify campaign execution and accelerate time to value.

- **Ecosystem and reach:** Airship's go-to-market strategy blends direct customer engagement with a network of agency and system integration partners to extend its global reach. While this model offers clients flexibility in service delivery and access to expertise, buyers should assess potential differences in integration capabilities, service consistency and accountability between Airship's own teams and third-party providers.

Cautions

- **App-and web-centric customer base:** Airship's platform provides support for nonmobile channels. Buyers with advanced campaign management requirements for offline data integration to support complex segmentation or targeting may find these capabilities insufficient and should conduct proofs of concept (POCs) to validate AXP's performance.

- **Geographic dependencies:** Multinational organizations with complex, high-throughput delivery needs should validate Airship's regional executional performance, due to Airship's use of external fulfillment partners for some channels. Airship's customer base and support resources are concentrated in North America and EMEA, and AXP's user interface is only available in English.

- **Evolving AI and analytics features:** Many of Airship's advanced AI-driven journey orchestration and prescriptive intelligence features are newly released or planned. Buyers seeking mature, end-to-end AI capabilities, advanced analytics or robust self-service business intelligence may need to supplement AXP with other tools.

Bloomreach

Bloomreach is a Visionary in this Magic Quadrant. Its Bloomreach Engagement MMH focuses on supporting personalized experiences through website, email and other channels. Its operations are focused in North America and EMEA, serving mostly midsize and enterprise customers in retail, gaming, manufacturing, and travel and hospitality. Loomi AI offers natural-language, AI-powered audience, campaign and report creation. Recent enhancements include an agent for performance analysis, multichannel execution support and real-time personalized content creation. Its roadmap includes focus areas such as expanding marketing agents' ability to run autonomous campaign ideation and optimization.

Strengths

- **Agentic shopping experiences:** Bloomreach's shopping assistant, Clarity AI, provides a commerce-focused agent that can address customers' requests for information and services, such as changing a shipping address. Clarity AI enables in-depth, personalized conversations — helping shoppers discover products and complete purchases — embedded in campaigns and journey orchestration.

- **Real-time activation:** The real-time customer data engine provides profile updates like page visits, email opens or purchases as they occur. This allows marketers with complex data ecosystems to rely on Bloomreach's product suite to perform real-time orchestration with the most up-to-date customer data.

- **Use Case Center:** Bloomreach Engagement's Use Case Center provides a library of recommended journeys, ranging from "abandon cart" campaigns to postpurchase triggers. These allow marketers to configure and create more complex journeys and enable more testing at scale.

Cautions

- **Vertical/industry focus:** As Bloomreach Engagement offers robust personalization and optimization, it is well-suited for buyers with the business model or the strategy to make use of product recommendations. Marketers who do not see competitive advantage in advance personalization should carefully assess Bloomreach's approach, as its most advanced capabilities likely will overserve their needs.

- **AI product strategy:** Bloomreach presents a compelling vision of an AI-enabled platform; however, many advanced capabilities are sold as add-ons. Buyers seeking advance optimization capabilities should carefully evaluate their specific use cases to ensure that they purchase the appropriate add-ons. Capabilities such as audience optimization and contextual personalization will need to be added to the final agreement.

- **Regional third-party support:** Bloomreach's growing partner ecosystem may complicate adoption for multinational organizations. Large enterprise marketing buyers outside of Europe, Bloomreach's most developed region, should assess availability of local agency and service partners.

Braze

Braze is a Leader in this Magic Quadrant. Its Customer Engagement Platform orchestrates and sends customer communications across channels, including email, SMS and mobile app notifications. Its operations are mostly in North America, EMEA and APAC, serving mostly B2C enterprises in retail, hospitality and financial services. Recent platform enhancements include more data warehouse integrations, zero-copy data access and automated identity resolution via Braze's Data Platform, as well as added support for Rich Communication Services (RCS) and LINE. Its roadmap includes AI decisioning capabilities through its OfferFit acquisition, stressing its commitment to advanced personalization.

Strengths

- **Growth-driven development:** Braze has used its recent growth to invest in new capabilities; for example, its acquisition of OfferFit, an AI-decisioning company, promises to improve Braze's own functionality in this area. To support growth in EMEA, North America and APAC, it invests in its regional capabilities, adding new data centers in Australia and Indonesia.

- **High service level:** Braze fields a robust customer support and success organization, and organizes regular executive business reviews, customer events, workshops and training. It

achieved a CSAT score of 97% in 2024, thanks in part to its internal customer success efforts.

- **Intuitive UI:** Braze has designed its platform's user interface to help marketing leaders achieve complex tasks with ease — an aspect frequently praised by Peer Insights reviewers. For example, Braze integrates its analytics suite into its native journey builder, Canvas, helping marketing leaders personalize journeys based on likely performance with just a few clicks.

Cautions

- **Lagging in AI maturity:** Braze has made notable investments in GenAI, offering AI-assisted content generation. However, it currently trails some competitors in integrated analytics and AI for campaign optimization. The OfferFit acquisition corroborates the view that Braze sees and intends to close the gap, but full integration and enterprise-scale maturity will take time. Buyers ready to adopt AI-driven optimization and analytics should closely evaluate the availability of and roadmap for these capabilities.

- **Challenging for forecasting:** While Braze provides performance dashboards, these are largely separate from consumption reports, meaning organizations may still need to undertake additional work to achieve comprehensive reporting on ROI.

- **High total cost of ownership (TCO):** Braze's average implementation times have improved in recent years, though they remain slow relative to its peers. This suggests a high degree of integration work is required, which adds to the TCO. The topic of TCO frequently arises during inquiries, due in part to technical, integration and partner costs arising from advanced orchestration use cases.

Cordial

Cordial is a Niche Player in this Magic Quadrant. It offers AI to personalize multichannel customer journeys through unified profile management, predictive analytics and multichannel execution. It operates mostly in North America, serving midsize and enterprise clients in retail, media and consumer services. Recent innovations include AI features for personalized content, data-driven message optimization and real-time decisioning across channels. Its roadmap shows a shift toward autonomous marketing orchestration through the generation of personalized content variations, reducing manual effort, accelerating campaign agility and achieving more personalized, measurable business outcomes at scale.

Strengths

- **Vertical/industry strategy:** Cordial's platform is well-suited for D2C and enterprise retail, offering tailored capabilities for high-volume, multichannel campaigns and dynamic segmentation. Its industry expertise and consultative approach appeal to brands seeking agile, personalized strategies addressing the unique and fast-moving demands of the sector.

- **Foundational AI strength:** Cordial's native AI solution, Cordial Edge, powers real-time personalization with unified profile management and predictive analytics, recently enhanced with additional models for assessing price sensitivity and purchase propensity. These capabilities enable more precise audience targeting, timely and relevant customer engagement, and improved campaign performance with less effort.

- **Time to value:** Cordial accelerates time to value by delivering actionable AI-driven insights within the first month, allowing marketers to launch campaigns while completing onboarding. Clients benefit from dedicated customer success managers and consultative services that support implementation, deliverability and campaign strategy.

Cautions

- **Market presence:** Cordial's platform is intentionally versatile and not specialized for industries or regions, which may limit suitability for buyers seeking specialized features or data models for highly regulated markets. Cordial does have a global support ecosystem, but buyers may find its local partner support outside North America lacking, potentially increasing the difficulty and time to value of customization as well as total cost for buyers.

- **Prescriptive intelligence:** Cordial offers notable AI-enabled features to marketing users, such as its recent Message Insights product. However, it currently lacks some prescriptive intelligence features, like automatically identifying anomalous journey performance, and recommending specific journey maintenance actions to marketing users. Enhancements in AI-based journey prioritization is planned for later in 2025.

- **Workflow responsiveness:** Cordial's client feedback indicates some users experience interruptions or productivity issues that may be resolved through Cordial's CX services. Prospective buyers should validate Cordial's offering through POC tests to ensure alignment with their operational requirements.

Insider

Insider is a Visionary in this Magic Quadrant. Its Growth Management Platform delivers multichannel messaging, unified customer profiles and AI-driven personalization for global, B2C midsize to enterprise-scale clients across diverse industries, including retail, financial services, and travel and hospitality. Insider's surging growth brings with it MindBehind, an acquisition that adds customer-facing AI agents for marketing and customer service. Recent innovations include Agent One for agentic customer engagement, expanded personalization and prescriptive intelligence. Insider's roadmap includes more autonomous AI agents, such as those for localizing messaging, and new features to help large, global conglomerates manage diverse markets.

Strengths

- **Time to value and usability:** Insider enables rapid implementation and onboarding, with an average deployment of 30 days. High-touch training, an intuitive interface and AI-driven journey building help marketers achieve measurable results quickly, supporting proof-of-concept and enterprise-scale rollouts.

- **Vision and innovation:** Insider's GenAI-powered segmentation, journey recommendations and autonomous campaign optimization enable marketers to scale personalization and next best action strategies across channels. Agent One highlights Insider's aggressive AI investment, enabling autonomous, agent-driven customer engagement across marketing, service and product experiences.

- **Product packaging/vertical offerings:** Insider's bundled platform — offered in three tiers with a transparent three-metric pricing model — reduces licensing complexity for buyers. A global direct sales and support presence, combined with recent acquisitions, enables it to serve a diverse client base across industries and geographies, with tailored enhancements for verticals such as retail, financial services and media.

Cautions

- **Complex enterprise deployments:** Insider's deployments are still concentrated in midmarket organizations and typically structured as short-term contracts. Enterprises with highly complex, multiregion requirements — particularly in the Americas, where its ecosystem is immature — should assess its ability to support large-scale, phased implementations as well as local and long-term partnership needs.

- **Agentic AI capabilities:** Many of Insider's advanced agentic and GenAI features — including Agent One and upcoming vertical solutions — are either newly released or still

on the roadmap. As Insider sells Agent One separately from its MMH, organizations should seek references and conduct POCs to assess its readiness for critical use cases.

- **Platform overlap and integration:** Insider's broad platform may create business case challenges for enterprises with significant existing martech investments, as overlapping capabilities may be found in tools like CDPs and personalization engines. Buyers should assess Insider's use cases and conduct due diligence to ensure its incremental value and avoid unnecessary impacts on martech budgets.

Iterable

Iterable is a Challenger in this Magic Quadrant. The Iterable AI-Powered Communications Platform focuses on speed to execution support with new quick-action menus, dynamic content building and Journey Assist AI features for MMH journey orchestration. Iterable's operations are primarily in North America and EMEA. Its clients tend to be midsize to large enterprises in retail, media, travel and consumer goods. Recent improvements include the introduction of Iterable Nova, which provides an AI assistant for prompt-based campaign creation. The 2026 roadmap features predictive resource optimization, expanded localization and messaging integrations.

Strengths

- **Data-driven personalization:** Iterable's schemaless data model and integrated data pipelines centralize customer information, which users can process into audiences, recommendations or event-triggered journeys. Intuitive workflow features streamline campaign management, helping marketers build, optimize and manage journeys. Dynamic content tools and robust segmentation ensure tailored experiences across channels.

- **Flexible ecosystem connectivity:** Iterable's Smart Ingest, co-developed with Hightouch, integrates enterprise customer data for marketer use. Intuitive workflow tools provide access to API-based customer data and event streams for journey orchestration. A range of prebuilt connectors enable marketers to connect with cloud data warehouses for dynamic, cross-channel engagement.

- **Content creation and experimentation:** Iterable's flexible architecture and AI-assisted user interface help marketers scale personalization by generating creative variants for testing at scale. GenAI features help marketers produce content and code-based elements, like surveys and landing pages, supporting multichannel optimization.

- **Analytics and AI maturity:** Iterable provides solid native reporting and foundational AI insights, but comprehensive multichannel performance requires routing additional data to Iterable. While Iterable offers features such as anomaly detection and automated root cause analysis, its next best action capabilities remain limited, such as using self-optimizing algorithms to increase customer lifetime value.

- **Availability of mobile channels:** Iterable is optimized for campaign management across traditional digital channels but is not a mobile-focused platform. Iterable's primary channels are email and SMS, and it has narrow support for emerging mobile messaging channels. Marketers seeking support for RCS or consumer messaging platforms like Apple Messages for Business require additional configuration with third-party services.

- **Geographic reach and support:** Iterable's customer base and support resources are concentrated in North America, with limited presence in other regions. Multinational organizations should assess the availability of local support and resources to ensure adequate service levels outside North America.

MoEngage

MoEngage is a Niche Player in this Magic Quadrant. Its customer engagement platform consists of MoEngage Core, MoEngage Inform and MoEngage Personalize. It focuses on executing and optimizing marketing campaigns across channels, including email, SMS, web and app. Its operations started in APAC, with a growing presence in North America and EMEA. It serves mostly B2C midmarket and enterprise organizations in financial services, media and retail. Enhancements include AI assistant capabilities for creative generation and prompt-based audience targeting. Its roadmap focuses on agents and insight AI to help marketers onboard, define and plan campaigns, identify anomalies, and make recommendations to drive optimization.

Strengths

- **Intuitive UI:** MoEngage offers an intuitive platform for customer engagement and multichannel campaign execution. The platform allows users to execute and optimize complex and more standard campaigns across multiple channels with a visual journey canvas (flows), drag-and-drop features, APIs and SDKs.

- **Customer segmentation:** MoEnage uses no-code segmentation creation, including predictive attributes, natural-language-prompt-based creation and real-time counts. They

also offer out-of-the-box segmentation options to set up campaigns easily, and unified identity resolution features for customer profiles.

- **Customer support:** MoEngage provides 24/7 global customer support and professional services, including standard implementation services as part of its licensing terms. Support, including a chatbot that enables the client to convert chatbot help into a service request, can be useful for streamlining onboarding and ongoing campaign build-out.

Cautions

- **Geographic focus:** MoEngage is prioritizing growth in North America and EMEA, but nearly half of its sales and service presence is in APAC. Marketing buyers should consider whether this solution meets their own geographic goals, needs and requirements for local market understanding or localized support.

- **Conversational messaging capabilities:** MoEngage offers limited conversational and chat messaging capabilities, although AI-driven conversation summarization and intent analysis are planned in its roadmap. Prospective buyers who hope to ramp up their capabilities immediately or quickly will face implementation challenges and a lack of support.

- **AI agents:** Although MoEngage has introduced Sherpa AI and Merlin AI for AI and AI-driven functions such as segmentation, copywriting and dynamic content, it is still building additional AI agents within its roadmap to support campaign orchestration and decisioning. Buyers seeking these features should request specifics on timelines and MVP capabilities, while monitoring MoEngage's progress in delivering these features.

Optimove

Optimove is a Visionary in this Magic Quadrant. Its MMH is Optimove Positionless Marketing Platform, which is supplemented by its DXP Opti-X. Its AI-driven, next-best-action orchestration delivers self-optimizing campaigns and journeys at scale. It can launch, prioritize and optimize thousands of personalized, real-time campaigns across channels. Its operations are mostly in EMEA and North America, serving midsize and enterprise retailers with large SKU volumes, and online gaming and financial services organizations. Improvements include acquiring Adact for loyalty and gamification features, as well as enhanced agentic workflows, AI decisioning and content generation. Its roadmap includes AI agents for tasks like onboarding and content optimization, agent analytics, and data integration.

- **Foundational AI and automation:** Optimove has been successful at differentiating by deploying scalable AI automation in a modern MMH, enabling marketers in growth markets, like fintech and gaming, to harness next best action techniques. Its AI assistant, OptiGenie, accelerates marketers with high volumes of interactions by providing automated prioritization and optimization decisions, potentially improving impact through consistent incrementality measurements.

- **Prescriptive guidance and insights:** The AI-enabled assistant allows querying for campaign and audience insights, including churn analysis and high-propensity segment discovery. AI assisted features help audience targeting by improving access to insights and allowing more frequent campaign ideation, while AI automations such as Optibot autonomously detect anomalies and provide prescriptive recommendations on campaign optimizations.

- **Customer experience/time to value:** Optimove enables campaign deployment faster than most competitors, supported by comprehensive onboarding, dedicated data engineers and customer success initiatives. It has a learning management platform and provides in-product guidance features for continuous adoption and seamless usage.

Cautions

- **Limited market focus:** Optimove's customers share high-cadence, transactional customer engagement models — such as in online gaming, fintech and retail. Marketers with high-consideration products or brand-centric engagement models should carefully assess Optimove's approach. Its strengths in AI and prescriptive intelligence rely on incremental lifetime value, a metric not accessible to many business models.

- **Autonomous AI agent availability:** Optimove's agentic capabilities are on the roadmap. Currently AI assistants and automation provide users with insights, content recommendations and journey decisioning. Buyers should assess the depth of these features against their needs for agentic AI-driven orchestration.

- **Sales and partner strategy:** Optimove's few implementation partners keep that ecosystem relatively immature, suggesting continued reliance on in-house operations for onboarding and support. Buyers relying on agency or system integrator-led deployments should assess its partner capabilities and roadmap.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its Salesforce Marketing Cloud Engagement is supplemented by Data Cloud, Marketing Cloud Personalization, Marketing Cloud Intelligence and Loyalty Management. It supports multistep customer journeys and delivers an enterprisewide platform strategy. Its North America-based global operations serve a range of clients across banking, insurance, healthcare, media and retail. It recently released AI-powered automation for two-way conversational SMS, and Marketing Cloud Next to modernize and merge multichannel marketing with Data Cloud. Its roadmap includes agentic tools through Agentforce, including agentic decisioning for customer journeys; AI-driven content creation; and enhanced website content personalization and data actions.

Strengths

- **Agent builder:** Salesforce's enhanced UI for building and managing AI agents helps marketers easily manage, modify or create topics that inform and guide how agents converse and act. Marketers can then build a new agent from scratch, or they can further customize an agent to fit their needs for creating audiences, developing marketing briefs or personalizing recommendations.

- **Advertising activations:** With Data Cloud, marketers can connect affinity audiences from third-party advertisers and review audience insights directly in the platform. Segments are activated with partners like Google and LiveRamp, or any Salesforce AppExchange partner, supporting seamless integration of third-party data for targeted campaign execution.

- **Enterprisewide ecosystem:** Salesforce helps customers see the value of connecting sales, service and marketing under one tech umbrella. Customers leveraging multiple Salesforce Cloud products can transition to a unified customer experience across business functions, benefiting from its integrated approach.

Cautions

- **Data Cloud pricing impact:** Data Cloud shifted from a supplement to a near-necessity to most enterprise customers who seek advanced capabilities, such as real-time journey optimization and prescriptive intelligence. Its tiered, consumption-based pricing can challenge operating profit and cost forecasts, making dynamic cost modeling essential for large deployments.

- **Limited marketing agents' availability:** At the time of this evaluation, Agentforce's evolution and enhancements primarily focused on service and sales use cases, with marketing-specific applications limited to audience segmentation and paid media optimization. Marketers with agentic MMH use cases should validate the ROI of Agentforce by conducting a limited pilot. Carefully evaluate marketing use cases and forecast agents' consumption of Data Services credits in Data Cloud.

- **Transition to Flow Orchestrator:** Salesforce's Flow Orchestrator replaces Journey Builder as a streamlined, Data Cloud-native integration. Existing Marketing Cloud Engagement customers have a choice, but should assess the long-term costs of adopting and managing both legacy and new journeys since existing Journey Builder journeys will run in emulation mode.

SAP

SAP is a Challenger in this Magic Quadrant. Its SAP Emarsys targets organizations seeking AI-driven personalized engagement and integration with its SAP Business Suite. Its operations are mostly in EMEA, North America and APAC, serving enterprise and upper midmarket clients in retail, e-commerce, consumer products, sports and entertainment, utilities, and travel and hospitality. Its Joule conversational AI assistant for prompt-based campaign generation expands channel support (such as TikTok and LinkedIn) and GenAI-powered content and messaging for SMS and WhatsApp. Its roadmap focuses on using AI agents to suggest actions and optimize workflows for engagement and conversational channels, including LINE, and campaign generation.

Strengths

- **Industry vertical accelerators:** SAP offers prebuilt, customizable, industry-specific marketing journeys through its Industry Accelerators, leveraging out-of-the-box data models tailored to vertical needs. AI models train on relevant datasets to support use cases including subscriber churn likelihood for utilities and CPG customers, and next best offer recommendations for retail and travel customers.

- **Marketing performance optimization:** SAP Emarsys enables marketers to monitor digital advertising performance and return on ad spend directly within the platform. Users can review KPI performance across campaigns, access predictive insights comparing treatment and control groups, and share top-performing campaigns with other business units for broader adoption.

- **Two-way communication:** SAP Joule supports two-way communication across SMS and WhatsApp. It also supports web channels for use cases like shopping recommendations and product support. All customer interactions are captured and sent to SAP Emarsys, enabling real-time updates to customer profiles and supporting more personalized engagement.

Cautions

- **Suite-centric strategy:** SAP Emarsys remains positioned primarily for existing SAP customers, but the solution is overshadowed by the broader SAP portfolio. The integration of SAP's customer experience brands is progressing slowly, which may prolong the realization of a unified SAP CX offering.

- **Data integration strategy:** Many large enterprises in this market have implemented their own CDPs to address advanced data integration needs across their vast product portfolios. While SAP Emarsys offers adequate profile management and analytics, SAP's suite-first product strategy focuses on driving customers to purchase SAP Customer Data Platform (CDP) and Business Data Cloud to enable enterprise-level data aggregation and third-party data unification.

- **AI-generated marketing campaigns:** SAP Joule enables marketers to create and deploy customer segments using natural language queries. But current AI-generated marketing campaign capabilities are limited to campaign drafting and creating campaign analytics reports. Users seeking more advanced AI-driven campaign execution and orchestration should monitor SAP's roadmap for enhancements.

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

Two vendors were added to this Magic Quadrant:

- Airship

- MoEngage

Dropped

- Acoustic was dropped after not meeting the inclusion criteria for business/financial performance.

- Acquia was dropped after not meeting the inclusion criteria for MMH supporting consumables.

- MessageGears was dropped after not meeting the inclusion criteria for business/financial performance.

- Pega was dropped after not meeting the inclusion criteria for business/financial performance.

- Zeta Global was dropped after not meeting the inclusion criteria for software license revenue contribution and mobile messaging adoption.

Inclusion and Exclusion Criteria

Changes to our 2025 inclusion criteria include the addition of granular licensing terms; an increase in the minimum business/financial performance requirements; as well as new requirements for minimum channel adoption by a provider's customer base. To qualify for inclusion, providers need to meet all of the following thresholds:

Licensing:

- The vendor must offer its primary MMH product as a stand-alone or base configuration (lowest edition tier) license that does not require the purchase of other independent product SKUs (excludes consumable product SKUs, see below).

Business/Financial Performance:

- **MMH software revenue and customers:** The vendor is required to meet one of the following (reported as constant currency):

- At least $500 million in 2024 MMH software revenue and 1,500 MMH customers (logos) in 2024, or

- At least $150 million in 2024 MMH software revenue, and:

  - at least 350 MMH customers (logos) in 2024, and

  - the vendor added at least 25 paying net new MMH customers compared to 2023, or

- At least $50 million in 2024 MMH software revenue, and:

  - at least 150 MMH customers (logos) in 2024, and

  - the vendor added at least 40 paying net new MMH customers compared to 2023.

- **MMH supporting consumables:** The vendor is required to meet both of the following:

  - At least 50% of a vendor's MMH customers must also purchase a volume of email messages with the primary MMH product.

  - At least 15% of a vendor's MMH customers must also purchase a volume of SMS, MMS, RCS, mobile push or in-app messages along with the primary MMH product.

- **MMH customer contract value:** The vendor must meet or exceed an average annual contract value (ACV) of $90,000 for all MMH customers.

- **Total business revenue:** At least 70% of 2024 total company revenue is attributable to software license sales (MMH or otherwise), either SaaS/subscription revenue or new perpetual license sales.

Market Presence

- Rank among the top 25 organizations in the 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 2024.

- 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 with a minimum of 20 current customers in at least three of the seven following industries:

1. Banking, financial services and insurance

2. Healthcare (including providers, pharma and life sciences)

3. Manufacturing

4. Media

5. Retail

6. Services

7. 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 Functionality

- The vendor's primary MMH product — for edition-based licenses, the base configuration — must provide all of the required MMH functionality as native features in the primary MMH product (see the market definition above).

- Vendors must provide packaged integrations with other commercially available martech and enterprise systems in a minimum of five of the following categories:

  - Adtech platforms (DSP, DMP, etc.)

  - Cloud data platforms

  - CRM/salesforce automation

  - CRM/customer experience management

- Digital commerce platforms

- Personalization engines

- Marketing analytics, reporting and BI dashboard products

- Content management, digital asset management, product information management or content marketing platforms

- Identity resolution services (deterministic or probabilistic)
- Vendors must offer channel SKUs for:

  - Email

  - Carrier-based channels (SMS, MMS or RCS)

  - Walled garden advertising destinations (Google and Meta)

- Vendors must offer five (5) advanced channel SKUs, such as:

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

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

  - 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

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 system 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.

Ability to Execute Evaluation Criteria

Evaluation Criteria	*Weighting*
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High

Evaluation Criteria	Weighting
Marketing Execution	Low
Customer Experience	Medium
Operations	Low

Source: Gartner (September 2025)

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 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.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2025)

Quadrant Descriptions

Leaders

Leaders demonstrate comprehensive support for all MMH critical capabilities and consistently meet customer needs across core use cases, including implementation, journey

building, multichannel optimization and customer journey analysis. They exhibit high market visibility, strong penetration, sustained momentum and a well-articulated strategic vision for future MMH growth. Leaders are also successful in attracting and retaining a diverse customer base across industries and geographies.

Challengers

Challengers possess strengths in one or more critical MMH use cases, such as journey and campaign orchestration or workflow innovation, and focus primarily on meeting the needs of established clients. While they excel in execution for selected functions, their strategic direction tends to follow market trends rather than set them. Challengers are recognized for the quality of support and partnership they offer, but may lack the breadth of vision or innovation seen in Leaders or Visionaries.

Visionaries

Visionaries excel in delivering emerging MMH functionalities — such as AI agents, prescriptive intelligence, or two-way, conversational engagement — that enable marketers to execute leading-edge, multichannel programs. They often set strategic direction or introduce innovations that shape future market standards, but may face gaps in execution, service or ecosystem maturity that limit their scale and market impact. Visionaries show strong potential but may not yet deliver comprehensive solutions across all MMH requirements.

Niche Players

Niche Players address specific needs within the MMH market, often focusing on particular functions, industries or geographies. They may lack a full suite of multichannel capabilities or advanced analytics, and their solutions are typically adopted for a subset of use cases, such as email marketing or campaign orchestration. Niche Players may also have limited resources or market strategy, resulting in lower visibility and presence compared to other quadrants.

Context

MMHs hold wide appeal to marketers because they enable essential digital marketing capabilities, like campaign management and journey orchestration. Marketers invest in

MMHs to improve outcomes like revenue, customer engagement, loyalty and lifetime value. MMHs share functional similarities with email platforms, mobile marketing platforms and B2B marketing automation platforms, but are distinguished by their ability to coordinate interactions across multiple channels and touchpoints. They are often used together with CDPs, asset or content management tools, and personalization engines, and serve to complement other software offerings, such as adtech or sales, service or commerce CRM solutions. At a minimum, MMHs must enable marketers to leverage data to deliver personalized content and experiences across addressable channels to known individuals.

MMHs are foundational and heavily used technologies, but users don't frequently make use of their most advanced features for multichannel marketing and journey orchestration. Underutilization alone isn't problematic, unless stakeholders also expect a high return on investment, as in MMH. Underadoption undercuts the MMH's strategic value, because it suggests marketers aren't actually using — or able to use — its advanced, and expensive, features. With increasing budget scrutiny, CMOs may need to reexamine the MMH's business case, acknowledging constraints on their organization's capacity to operate it efficiently and effectively. Absent clear and transformative productivity gains, MMHs risk being perceived as costly and underperforming: the juice of orchestration simply not worth the budgetary squeeze.

In the last year, MMH providers have embraced agentic AI as the most promising pathway to transformation, potentially fully automating the end-to-end life cycle of journeys — from initial brief to build, optimization, maintenance and deprecation. In theory, agentic capabilities will help shift multichannel marketing from episodic, hand-crafted campaigns to always-on, adaptive experiences designed, built and optimized autonomously. AI agents in 2025, however, are largely aspirational, with most offerings anchored in automation — such as send-time optimization — or through push-button assistants that speed workflows, but don't replace marketers' role in them. As of mid-2025, agentic orchestration is a product strategy, not a proof point or validated business case, and doesn't yet have a claim to solve MMH's cost-to-value conundrum.

Reflecting the rapid shifts in MMH, Gartner's 2025 evaluation methodology placed greater scrutiny on the real-world value and maturity of AI innovation — sometimes in the form of true agentic capabilities or, more commonly, assistants and automation. We also elevated the importance of two-way conversational engagement, driven by the rise of shopping assistants and interactive channels such as SMS and chat. This year, we introduced new criteria to assess utilization and cost forecasting — capabilities that help users understand,

plan and govern the use of data credits, media volumes and other consumables. As consumption-based pricing models proliferate and agentic AI emerges, marketing leaders must look beyond the speculative returns and seek out tools that make transparent the budget impact of agentic AI.

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. When building business cases, start by estimating your organization's productivity growth needs for multichannel campaign management. Rigorously assess — and ideally use POCs to test — a provider's ability to drive measurable and cost-efficient productivity gains through AI. Develop a comprehensive, agile change management plan that supports both the implementation and sustained adoption of MMH features, including ongoing education and enablement. Evaluate solutions not only for core functionality, but also for their impact on marketing velocity, time to value and total cost of operations (tech, labor and AI). Finally, consider how each provider's product development, customer success and partner ecosystem can accelerate your ability to realize results and maximize the return on your MMH investment.

Market Overview

The cyclic patterns of growth, consolidation and disruption have long characterized technology markets. In recent years, the MMH market seemed ripe for the latter, as its role in martech stacks 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 said they would not consider one. [1] But despite widespread deployment, mounting frustration among MMH buyers over persistently low adoption rates and underutilized capabilities has intensified skepticism about the technology's ROI, creating urgent pressure for providers to deliver tangible value and justify continued investment.

In 2025, the MMH market stands at a crossroads between its campaign-centered legacy and a future defined by journey orchestration. After years of ambiguous overlap with customer data platforms (CDPs), 2025 brings renewed clarity to MMH's role. Advances in AI and the adoption of warehouse-native integrations are positioning MMHs to finally achieve high-scale, personalized engagement. However, intensifying buyer demand for measurable ROI and operational simplicity has exposed a critical vulnerability for most providers: the inability

to accurately forecast and govern costs, particularly as consumption-based pricing models introduce greater variability and unpredictability.

While MMHs remain foundational to digital marketing, persistent underutilization and growing complexity have widened the gap between platform capabilities and realized business value. As martech budgets face heightened scrutiny, both providers and buyers are reexamining what constitutes meaningful innovation and sustainable differentiation in the MMH market.

Enterprise Providers Embrace Agentic Orchestration

Enterprise application providers (EAPs) such as Adobe, Salesforce and SAP have positioned themselves as the primary enablers for large organizations that seek high-scale personalization and journey orchestration. By integrating MMH, CDP and advanced AI — including emerging agentic capabilities — in unified platforms, EAPs promise to empower enterprises to automate, personalize and optimize engagement at unprecedented scale. These providers are championing agentic AI as the pathway to close MMH's utilization-to-value gap through AI-driven conversational engagement with customers.

However, the reality in 2025 is more nuanced. Most large organizations remain in the midst of multiyear migrations from their providers' fragmented, legacy suites to modern, CDP-enabled platforms. This transition is resource-intensive and often marked by operational disruption as teams adapt to new architectures and workflows. While EAPs have accelerated their embrace of AI and agentic features, these innovations are not yet fully realized in production environments, with most deployments still limited to automation and assistant-driven enhancements rather than true autonomous orchestration.

Compounding these challenges, the adoption of consumption-based pricing models brings new layers of cost complexity. While providers' new platforms unified architecture, features common to multichannel marketing are often locked to other product modules, forcing marketers to add on or forgo features common in best-of-breed competitor MMHs. Marketing leaders report difficulty in forecasting and controlling spend, especially with the rise of consumption pricing, resulting in unanticipated overages and growing concern over budgetary risk. As a result, even as EAPs offer the promise of scalable, AI-driven orchestration, buyers face heightened pressure to ensure that large, enterprisewide investments in orchestration deliver measurable value.

Independents Strengthened Through Acquisitions and Foundational Investments

Independent MMHs have largely adopted platform architectures, positioning themselves as customer engagement platforms (CEPs) to compete with EAPs. These tools embed CDP-like features to orchestrate real-time, cross-channel engagement and deliver personalized experiences. CEPs in our 2025 evaluation include Airship, Bloomreach, Braze, Cordial, Insider, Iterable and MoEngage. Insider and Bloomreach stand out for innovation in prescriptive intelligence and AI agents, notably Insider's acquisition of MindBehind. Both providers have invested in agentic capabilities that move beyond traditional automation, aiming to deliver more autonomous, consumer-facing, agent-driven experiences such as shopping assistants and service agents.

Across the CEP cohort, there is broad investment in foundational data infrastructure and AI/analytics, with Braze notably advancing its capabilities through the acquisition of OfferFit to enhance AI-driven experimentation and optimization. Iterable has also made significant investments in analytics, strengthening its ability to support data-driven engagement strategies. All providers added AI assistants to accelerate workflows and boost the production of personalized content, offer or message variants. However, true AI maturity, especially in the form of autonomous agents and advanced prescriptive intelligence, remains limited. Many have yet to deliver production-ready agentic AI. Prescriptive intelligence continues to distinguish Optimove, despite advances from Bloomreach and Insider.

While consumption-based pricing is less prevalent among CEPs, providers still face a growing imperative to equip marketers with better forecasting and scenario-planning tools. As journey creation becomes faster and more accessible, marketers need clear, actionable feedback on potential costs, resource consumption (such as budget and channel volumes), anticipated outcomes and the opportunity costs associated with each new campaign or journey.

GenAI Capabilities: Assistants Aspire to Be Agents

In 2025, all MMH providers expanded their GenAI capabilities, though the majority of innovation remains concentrated in content generation and workflow acceleration. Most vendors now offer GenAI-powered assistants that help marketers create and personalize messaging, generate campaign assets and experiment with variations at scale. Many also

released other productivity-enhancing features, like chatbots that produce segments or generate entire multistep journeys, signaling a shift toward a far more dynamic and adaptive process for turning customer engagement to revenue through thousands of journeys.

However, the market's most ambitious vision is even larger: fully agentic orchestration. Like a dark factory, an agentic orchestration platform would continuously identify, build and optimize a huge portfolio of always-on, microtargeted experiences. This vision remains aspirational, confined to product roadmaps rather than live deployments. Every marketing leader should plan for a future of transformative productivity gains in MMH. Faster, cheaper and tailored experiences could open longstanding brands to competitive disruption, enabling small teams to outpace and outperform large marketing orgs, delivering conciergelike customer experiences at cut-rate costs.

For buyers, evaluating GenAI's real impact requires careful scrutiny. POC testing should focus on measurable outcomes such as campaign cycle time, resource efficiency and impact on marketing performance. As GenAI and AI agents mature, their ability to drive competitive advantage will depend not only on push-button assistants, but also on the depth of automation, full-agent orchestration and governance capabilities along with a sustained upswing in MMH's ratio of total cost to strategic value created.

Prescriptive Intelligence: Incremental Gains, Increasing Expectations

Prescriptive intelligence has become a focal point for MMH differentiation in 2025, with providers racing to help marketers manage the complexity of always-on, cross-channel journeys. All platforms offer users the ability to comb through deep reporting and analysis of campaign performance. Many now offer users GenAI assistants that can analyze and diagnose campaign underperformance. Some offer push-button assistants that can build audience targets or whole journeys from users' exploratory analysis. These advances can improve efficiency, reducing the time or skills needed to produce highly targeted and optimized marketing, but they fall short of the market's growing risk: resources to maintain ever-snowballing portfolios of always-on journeys, especially those generated quickly with AI's help.

A handful of providers — most notably Optimove, Insider and Bloomreach — have made tangible progress in developing prescriptive intelligence features to help marketers manage and prioritize tens of thousands of trigger-based journeys. Their platforms are beginning to

surface actionable insights, automate opportunity detection, and even generate new journeys or content in response to real-time signals. However, the majority of MMH solutions still lack deeply integrated, production-ready prescriptive features capable of reliably advising marketers on the optimal mix of journeys and campaigns that will drive the highest return.

As marketers accelerate journey creation and experimentation with the help of AI, the need for robust, predictive prescriptive intelligence is intensifying. Buyers should prioritize platforms that not only offer recommendations, but also provide transparency into how those insights are generated and their likely impact, and have the ability to govern and refine automated actions. Ultimately, the true value of prescriptive intelligence will be measured by how effectively it can help marketing scale up agile marketing, improving enterprisewide outcomes through next best action guidance.

MMHs' Composability and Cost Transparency Mandate

Composability has emerged as a key differentiator in the MMH market, with both EAPs and CEPs promoting modular architectures that integrate with cloud data warehouses through zero-copy-style integrations. While composable solutions offer the potential for disruptive pricing and more agile marketing operations, their real-world benefits remain nascent for most buyers. At this stage, it's unclear whether composability means much more to marketing buyers than a way to signify the importance of data warehouse access as a critical capability. Many providers' claims amount to incremental enhancements of APIs and integrations, rather than truly interoperable, plug-and-play architectures. As a result, the anticipated gains in agility and cost efficiency have yet to be fully realized at scale, because composable integrations can make for complex workflows, where end-user marketers pay the price of technical progress in their productivity.

At the same time, the proliferation of consumption-based pricing models, particularly among EAPs, has introduced even more layers of financial complexity and risk for marketing organizations. As composable integrations become more prevalent, a significant share of operational costs will shift downstream to the data warehouse, placing new demands on IT teams and potentially obscuring the true total cost of ownership for marketing initiatives. This redistribution of costs heightens the need for cross-functional governance and shared scenario planning between marketing and IT.

Across the market, all providers still have a considerable distance to go in empowering marketers with real-time forecasting, granular cost controls and actionable insights into the financial implications of their campaigns. Notably, Salesforce has invested in tools like Digital Wallet to help marketers better manage and visualize spend, but even these efforts represent only an initial step toward true financial transparency. As the industry moves toward agentic orchestration — where AI-driven systems autonomously generate, optimize and scale personalized experiences — transparency becomes even more critical. Marketers and IT leaders must find their equivalent to Carson's speed — the speed at which an airplane minimizes time to destination and maximizes fuel efficiency. For agentic journey orchestration, this balance between speed and efficiency is attained by controlling frequency and intensity — how often data is cached from the data warehouse and how frequently agents generate new journeys, or the degree to which they tailor customer experiences.

To confidently adopt emerging agentic AI, marketers need transparent reporting and scenario planning to ensure profitable interactions within predictable budgets. Providers have an opportunity to differentiate by introducing better systemwide controls for governing the volume and velocity of agentic orchestration and data manipulation. Without safeguards and governance controls, unexpected overages and diminishing returns can quickly erode trust in both the technology and its original business case. Marketing leaders should look beyond the basic, backward-looking consumption or credit-use reporting in most MMHs. Seek tools with clear cost-forecasting features, as well as governance features for speeding or slowing credit consumption. Complement your MMH with a martech operating model that delivers both operational agility and efficiency. Challenge your marketers with a new mandate: right message, right channel, right time and at the right cost.

⊕ Evidence

⊕ Evaluation Criteria Definitions