Magic Quadrant for Marketing Mix Modeling Solutions

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CMOs continue to allocate large percentages of their marketing budgets to advertising, the results for which are especially difficult to measure. MMM solutions can illuminate the relationships between investments and outcomes, and help CMOs map out pathways to improved efficiency and effectiveness.

Market Definition/Description

Gartner defines marketing mix modeling (MMM) solutions as services and software that help chief marketing officers (CMOs) plan future spend and measure past investment performance. MMM applies advanced statistical techniques to aggregate time-series data to quantify the holistic impact of marketing and optimize business outcomes such as sales or lead generation. MMM solutions acquire and normalize marketing data, build advanced statistical models based on that data, measure marketing performance, and deliver recommendations to improve spending effectiveness and efficiency. Results are delivered to marketers, media planners, and marketing and financial analysts via software and presentations.

Marketing mix modeling solutions quantify the holistic impact of marketing. They account for business factors (like inventory availability or physical footprint) and external factors (like consumer perception, competitive activities or macroeconomic conditions), and attribute that impact to different channels or campaigns. CMOs use MMM solutions for three primary use cases:

- Demonstrate marketing's value by quantifying historical marketing performance while accounting for external factors.

- Enhance current marketing performance by optimizing existing media budgets, particularly for paid advertising.

- Improve long-term marketing performance by evaluating multiple scenarios for marketing budgets and external factors.

Mandatory Features

The mandatory features for MMM solutions include:

- Marketing data acquisition and normalization via API (or similar method) from the most popular sources, including digital media, offline advertising and sales history

- On-demand creation of initial predictive models from data inputs

- Presentation of model results to marketers

- Flexible scenario planning with the ability to adjust input parameters and ranges individually, without requiring code, through a web-based scenario planning tool

- Media optimization calculator to maximize revenue, profit or other outcomes for a given budget amount and set of constraints

- Ability to model both online and offline business outcomes while controlling for impacts of economic, competitive or other external factors on those desired outcomes

Common Features

Common features of MMM solutions include:

- Quarterly, monthly or weekly refreshes of predictive models using automated fine-tuning techniques

- Ability to quantify halo effects across hierarchical or related marketing budgets, including brands or lines of business, and across purchasing channels or marketing channels

- Generation of paid media plans from output of optimization calculators

Magic Quadrant

Figure 1: Magic Quadrant for Marketing Mix Modeling Solutions

CHALLENGERS | **LEADERS**

- Analytic Partners
- Ipsos MMA
- TransUnion
- Ekimetrics
- OptiMine
- Kantar
- Circana
- Fractal
- C5i
- Keen Decision Systems

ABILITY TO EXECUTE

NICHE PLAYERS | **VISIONARIES**

COMPLETENESS OF VISION → As of October 2025 © Gartner, Inc

Gartner.

Vendor Strengths and Cautions

Analytic Partners

Analytic Partners is a Leader in this Magic Quadrant. Its Commercial Analytics offering focuses on comprehensive marketing measurement and enterprise decision making. Its operations are geographically diversified, and its clients tend to be large and midsize enterprises. For 2026, its strategic roadmap focuses on delivering a more systematic approach to model building that will tailor model updates to emerging client questions. In addition, its roadmap has identified the delivery of Ask Genome 2.0 as a top priority in 2026;

this option within GPS Enterprise will reduce the time required for onboarding and training its generative AI (GenAI) models to facilitate insight generation within its platform.

Strengths

- **Comprehensive platform capabilities:** Analytic Partners' software provides a robust set of features. GPS Enterprise includes a set of capabilities not offered by many vendors within this research, such as the ability to model multiple simultaneous KPIs, scenario plan against multiple objectives, and monitor media plan adherence.

- **Enterprise enablement:** Analytic Partners delivers strong out-of-the-box capabilities that are tailored to users outside the marketing function. These include tailored dashboards, training material, and the ability to quantify impacts from inventory and footprint. Among providers in this research, it saw the highest percentage of users and buyers outside of marketing.

- **Self-service, AI-driven insights:** Analytic Partners' Ask Genome feature is a containerized generative AI capability that enables marketers to ask questions and discover insights, trends, and best practices for their marketing performance. It allows marketers to more easily derive insights from its ROI Genome and GPS Enterprise platforms, while the containerization ensures data privacy and compliance.

Cautions

- **High implementation costs:** Analytic Partners' MMM solution costs are among the highest in this research. It works with large, complex global organizations that require additional effort. Prospective clients should assess the incremental value of its differentiators and the alignment with their intended use cases.

- **Lack of in-house experience:** Analytic Partners has not deployed an in-house MMM for a client. It does offer this capability, but its clients rarely consider it. Prospective clients interested in in-housing should also consider other vendors that provide this capability for comparison.

- **High learning curve:** Compared to others in this evaluation, GPS Enterprise's user interface may be intimidating for nontechnical or novice users. Prospective clients should ensure critical users become proficient in the platform prior to initial model delivery.

C5i

C5i is a Niche Player in this Magic Quadrant. Its Demand Drivers platform focuses on delivering functionality around data infrastructure, modeling, insights, media simulation, and forecasting. Its operations are geographically diversified, and its clients tend to be large and midsize enterprises across a variety of industries. Its 2026 roadmap includes delivery of robust capabilities for fine-tuning model parameters to increase the accuracy of what-if scenario planning. This will be accomplished by introducing multilevel optimization and more dimensions of marketing data to its scenario planning capabilities. It also plans to enhance the automation of its data ingestion pipelines.

Strengths

- **Flexible engagement models:** C5i allows clients to choose between one-time MMM delivery and ongoing engagement through SaaS, hybrid or full-service consulting delivery.

- **Operational strength:** C5i has the most tenured employee group among vendors in this research. It prioritizes upskilling and cross-training its employees to build out its organization and enable professional growth. This approach increases employees' ability to ground insights across a wide array of clients and industries.

- **Flexible in-housing delivery:** C5i enables clients to license their software and execute their own model using its platform. A high proportion of its clients in-house their models, and it has a strong migration and training program to ensure a successful transition.

Cautions

- **Limited support for finance:** C5i lacks dedicated onboarding and reference tools for finance users within its platform. As a result, its platform has fewer finance users relative to other Niche Players in this research. Prospective clients looking for extensive support for finance teams should work closely with C5i to design an adoption plan to ensure short- and long-term buy-in from nonmarketing users.

- **Incremental pricing for additions:** C5i's platform offers a per-year, per-user license fee, but the addition of new data sources is priced based on the complexity and hours of effort required from its team. Prospective clients should identify all specific data needs before contracting to determine any future fees that may be incurred based on foreseeable changes.

- **Training needed for nonanalysts:** C5i's Demand Drivers platform lacks clear onboarding, reference tools, and knowledge base functionality. Prospective clients should work with

the vendor to ensure proper training takes place across their organization prior to completing MMM implementation.

Circana

Circana is a Niche Player in this Magic Quadrant. Its offering enables marketers to assess their investments' impact and optimize their marketing budgets through proprietary retail datasets. Circana completed its acquisition of Nielsen's MMM business in August 2025. Its operations are globally diversified, and it has a high concentration of consumer packaged goods (CPG) clients. It plans to expand its coverage across products and geographies and roll out its Liquid Mix software during the second half of 2025 to deliver MMM results faster.

Circana declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Retail data and CPG assets:** Circana has access to store-level sales, inventory, and promotion activity data as well as thousands of benchmarks for a range of supermarkets and major CPG and general merchandise retailers. These increase the precision of models built on store-level data when calculating the impact of store-specific dynamics, such as inventory stockouts.

- **Comprehensive marketing measurement:** Circana's offering provides the capabilities of MMM, multitouch attribution, and lift studies to quantify the impact of campaigns and creative elements.

- **Global coverage:** Circana's worldwide presence enables it to support project implementation from the closest local country office and provide local expertise in 19 countries across five continents. Based on first-party data, or data secured by clients' data-sharing agreements, Circana can cover a broad range of countries and categories.

Cautions

- **Narrow market focus:** Circana focuses its offerings (including MMM) on CPG, durable goods, and retailers, supported by vertical-specific data and assets. Prospective clients in other verticals should carefully evaluate whether it can meet their needs.

- **Impact of acquisition integration:** In August 2025, Circana completed its acquisition of Nielsen's MMM business. Gartner expects that the integration work associated with

bringing together two large organizations, platforms, people, and measurement methodologies will likely require significant effort. Prospective clients should assess Circana's ability to support their use cases with current capabilities.

- **Research-centric view:** On its website, Circana refers to MMM as a "study" and recommends waiting "until a marketing period has closed" before running a study. Other vendors position MMM as an always-on decision support tool, reframing the actions for agility instead of research. Prospective clients should consider the impact of this perspective on achieving their adoption and business goals.

Ekimetrics

Ekimetrics is a Visionary in this Magic Quadrant. Its One.Vision product focuses on a modular approach to MMM that offers clients a customizable mix of capabilities. Its operations are geographically diversified, and its clients tend to be luxury, consumer packaged goods (CPG), retail, financial services, and automotive companies. In the second half of 2025, Ekimetrics plans to enhance its user-centric scenario planning platform with new agentic AI capabilities and improve the quality of insights by standardizing and unifying benchmark data. In 2026, it aims to launch models that support multi-KPI optimization targets while improving and expanding creative measurement.

Strengths

- **Strong industry understanding:** Ekimetrics shows an awareness of the critical interdependencies among media agencies, AI capabilities, MMM providers, and clients utilizing these solutions. It provides solutions that maximize value across those relationships and minimize silos.

- **Platform modularity:** One.Vision offers 12 specialized modules with specific functionalities, such as a customer analytics module to assess the impact of cross-brand upsells on overall loyalty. This approach delivers financial flexibility to clients by enabling them to invest only in the module-specific capabilities that align with their unique business needs.

- **Creative marketing insights:** Ekimetrics' intuitive, end-to-end interface enables creative and brand leaders to easily understand the impact of creative on marketing investment performance.

Cautions

- **Limited R&D funding:** Ekimetrics' R&D investment, as a percentage of revenue, is low compared to that of other vendors, even as its MMM customer base grows. This may restrict the pace of its product innovation. Potential clients should audit the vendor's short-term and long-term roadmaps to verify support for their specific use cases.

- **Pricing standardization challenges:** Ekimetrics' modular and flexible solution architecture may make it difficult to understand customized pricing beyond quoted scenarios. This, in turn, makes it more difficult to understand cost drivers. Potential clients should establish multiple potential scopes and price options to determine their best path forward.

- **Lack of media plan monitoring:** Ekimetrics does not offer the ability to monitor adherence to the media plans provided by its solution or to fully capture the solution's contribution to overall MMM outcomes. Potential clients should establish alternative approaches to defend marketing and MMM investments.

Fractal

Fractal is a Niche Player in this Magic Quadrant. It develops custom MMM data infrastructure and software for each client, leveraging its MINE scenario planning tool and BLEND data science workbench product for marketing budget simulation and optimization capabilities when possible. Its operations are geographically diversified, and its clients tend to be large enterprises across sectors, with a high concentration in consumer products and IT. It plans to incorporate above-the-line, shopper marketing and all promotional activities into its optimization engine in the second half of 2025 and automate end-to-end modeling using agentic AI by 2026.

Strengths

- **Productizing custom solutions:** Fractal recently enhanced its planning and optimization platform, MINE, and launched BLEND, a self-service MMM workbench that streamlines data ingestion and automates model management. These tools give data scientists, subject matter experts and industry professionals increased control over model quality and delivery.

- **Buyer empathy:** Fractal understands the challenges buyers face, such as achieving C-suite alignment and conducting granular analysis. Its systematic development approach enables effective executive collaboration and delivers custom-made modeling solutions tailored to each client's strategic requirements.

- **In-housing centricity:** Fractal takes a custom software development approach, which lends itself well to customer in-housing. As a result, it has the shortest in-house MMM model transition period among vendors in this research. It provides upskilling, shadowing, and reverse shadowing for data scientists, subject matter experts, and executives.

Cautions

- **Reduced roadmap reach:** The items on Fractal's MMM solution roadmap benefit a fraction of its clients, due to the custom nature of its development approach. Some clients may have limited access to advanced features and ongoing MMM innovation. Prospective clients should validate the utility of Fractal's existing solutions to align their delivery expectations.

- **Slower initial model delivery:** Fractal's solution takes longer to deploy than other providers. This longer time to value is a steep trade-off against the potential for customized model outputs. Prospective clients should evaluate their readiness for a longer implementation period versus expected value delivery and financial impacts.

- **Lack of creative scoring:** Fractal's platform lacks the capability to ingest creative quality scores, quantify impact driven by creative, and simulate budget changes for different marketing creatives. Prospective clients with a focus on creative measurement should request a quote from Fractal for custom development of this capability.

Ipsos MMA

Ipsos MMA is a Leader in this Magic Quadrant. Its Activate platform and Core Data & Analytics studio manage end-to-end MMM for global enterprises. Its operations are geographically diversified, and its clients tend to be global enterprises across industries. Ipsos MMA's strategic roadmap focuses on additional API integrations, generative AI chatbot interfaces for reporting in the first half of 2026, and building agentic AI into its Activate product suite over the course of 2026. The aim is to enable clients to quickly build and assess multiple complex scenarios and make more informed decisions.

Strengths

- **High customer retention:** Ipsos MMA has the highest gross customer retention rate and average customer tenure among providers in this research. Many clients form multiyear agreements with Ipsos MMA.

- **Time commitment transparency:** Ipsos MMA has built customer roles and activities into its governance model for MMM implementation and utilization. It sets specific expectations for customer time commitments and ramps commitments as programs transition to "run" mode.

- **Comprehensive impact analysis:** Activate enables marketers to easily balance multiple KPIs (such as profit and new customer acquisition) when optimizing media plans. Marketers can quickly understand the short-term and long-term impacts of marketing as well as halo effects across brands, geographies, and lines of business.

Cautions

- **Platform usability challenges:** Some workflows and visualizations within the Core Data & Analytics studio are challenging for marketers to use. The solutions offer multiple ways to accomplish tasks within workflows such as creating scenarios, optimizing media plans, or reviewing business results, but each workflow has different constraints.

- **Premium pricing:** Ipsos MMA's pricing is the highest among vendors in this research. Prospective clients should weigh its total costs against their needs.

- **Limited cross-functional support beyond finance:** Support for supply chain leaders is limited. Its sales process does not include specific activities for leaders outside of finance. Cross-functional onboarding and support guides sit in a separate user interface from its reporting tools. Prospective clients seeking deep enterprisewide support should actively involve their cross-functional colleagues early and often when assessing and engaging Ipsos MMA.

Kantar

Kantar is a Visionary in this Magic Quadrant. Its LIFT ROI product focuses on marketing impact across different time horizons (long- and short-term) and the impact of advertising creative. Its operations are geographically diversified, and its clients tend to be large and midsize enterprises across a variety of industries. Its roadmap through 2Q26 focuses on GenAI to answer client questions about media performance and drivers as well as revamping its media optimization, marketing and business simulation, and portfolio modeling capabilities.

Strengths

- **Roadmap delivery:** Kantar has delivered both large and small enhancements to LIFT ROI, including simulation capabilities for all business drivers, constraints for optimizations (e.g., removing "great but unbuyable" recommendations), and the ability to distinguish between direct and indirect impact. It has also added data visualizations for marketers' key decision points.

- **Feedback responsiveness:** Kantar has a consistent record of delivering customer-feedback-driven updates, including multiyear simulations, the ability to model multiple impacts of marketing, and data management streamlining. These updates are all customer-facing, cross-functional, and cross-product, and they benefit significant portions of Kantar's customer base.

- **Brand impact clarity:** LIFT ROI clearly differentiates between multiple marketing impacts, separating short-term, direct impact from indirect impact (both short- and long-term). It can diagnose declining brand health, identify the impact of publicity that clients can't control, and use a wide variety of data sources in addition to Kantar's proprietary brand health and creative scoring services.

Cautions

- **Limited R&D capacity:** As is common for Visionaries, Kantar lacks capability parity with the Leaders in this research, partially because it invests less (in both absolute dollars and number of employees) in research and development than other Visionaries and Leaders. Prospective clients should closely review its capabilities and roadmap to ensure alignment with current and near-term needs.

- **Marketing-centric engagement model:** Kantar typically engages primarily with marketing roles during model development and implementation. Prospective clients who need cross-functional engagement or to set specific time commitment expectations should proactively discuss these with Kantar to assess engagement model fit.

- **Lack of MMM in-housing:** Kantar has chosen not to offer in-housing of its MMM solution. Prospective clients considering eventually bringing their MMM in-house should evaluate its ability to deliver on their other needs as part of their trade-off assessment.

Keen Decision Systems

Keen Decision Systems is a Niche Player in this Magic Quadrant. Its SaaS MMM product allows users to optimize their full marketing budget through insights on the short- and long-

term effects of marketing investments. Its operations are focused in North America, with support for global clients primarily in consumer packaged goods (CPG). Its roadmap through 2026 focuses on increasing model robustness through models that support blending multiple KPIs, and incorporating location-specific enterprise drivers of sales (such as inventory, promotions, and pricing) into its platform.

Strengths

- **Continual innovation:** Keen consistently innovates. Recent initiatives include its AI-powered feature that drafts presentation narratives in the platform for easy usage, forecast reconciliation and always-on enhancements to its scenario-planning capability.

- **SaaS capabilities:** Keen offers a SaaS-first experience for MMM. This approach ensures all its clients have access to innovative capabilities as they roll out.

- **Fast speed to value:** Keen delivers its first models to clients faster than the other providers in this research — from contract signature to first model delivered. And of those models, more were approved in the first iteration than for any other provider.

Cautions

- **North American CPG-centric:** A high proportion of Keen's clients are in the CPG industry and headquartered in North America, which limits the breadth of its benchmark database and meta-model. Prospective clients from other industries should assess whether Keen can successfully make recommendations for their business context.

- **Limited complex supply chain support:** Keen's mix model currently identifies the marketing and other aggregate drivers of sales, such as weather, interest rates, competitive activity, overall inventory levels, and nationwide pricing or promotions. Prospective clients that experience significant variation in store-specific enterprise drivers of sales (such as store-level SKU-level inventory, distribution, promotions, and pricing) should assess Keen's utility in this context.

- **Limited creative taxonomy:** While Keen's platform can utilize creative execution data, it displays the results either at the campaign level or as a list of every creative variant. Prospective clients looking to understand creative trends (such as differences in messages or offers, but aggregated across placements, tactics, or channels) should be prepared to use additional tools.

OptiMine

OptiMine is a Niche Player in this Magic Quadrant. Its INTENT product focuses on comprehensive scenario planning and marketing measurement done at scale and with deep granularity. Its operations are mostly focused in North America and Europe, and its clients tend to be large and midsize enterprises in a variety of industries. OptiMine's roadmap is focused on expanding measurement beyond marketing and toward the enterprise during 2026. This focus includes new customer acquisition, lifetime value, customer switching, and targeting, and is expected to account for the impacts of pricing, promotions, trade, and competitive and market conditions to maximize value across the entire enterprise.

Strengths

- **Go-to-market strategy:** OptiMine has begun verticalizing its sales efforts and scaling its operations internationally. It also continues to advance its reseller partner program with a greater variety of partners, dedicated support, and participation in joint go-to-market activities with its partners.

- **Pricing:** OptiMine's implementation costs are among the lowest of any vendor in this research. In addition, minimal price adjustments are required for changes to data sources, users or model latency, and these savings can add up when compared to some other competitors.

- **Granular insights at scale:** OptiMine supports deep granularity for the media inputs and conversion outputs produced by its model. Its platform supports media splits by DMA, campaign, audience, creative, and device. The data hierarchy supported by its platform was among the best of all the vendors evaluated in this research.

Cautions

- **Limited options for POCs:** OptiMine no longer provides proofs of concept (POCs) in categories where it has extensive deployment experience. In place of a POC, prospective clients will need to rely on case studies and customer reference calls to assess OptiMine's fit.

- **Narrow implementation completion:** OptiMine currently defines completion of an MMM implementation based on its own deliverables rather than client utilization or media plan development. Prospective clients should establish action-oriented milestones and

acceptance criteria, such as "optimized media plan from MMM sent to agency for execution," to ensure long-term support and success.

- **Benchmark update frequency:** OptiMine's benchmarking data is delivered annually by default. Prospective clients looking for more frequent updates should work with OptiMine to determine the potential cost implications of more frequent updates and set a mutually-agreed frequency.

TransUnion

TransUnion is a Leader in this Magic Quadrant. Its TruAudience Analytics Solutions product focuses on MMM and marketing attribution. Its operations are mostly focused in North America and Europe, and its clients tend to be large advertisers across industries. By June 2026, it plans to generate automated insights and visualizations using agentic AI, and to streamline data collection, processing, and validation using automated workflows. In the second half of 2026, it plans to deploy industry-level MMM models for clients that may have sparse data.

Strengths

- **Strong market understanding:** TransUnion's extensive experience helps it identify market shifts as MMM strengthens its decision capability, enabling the vendor to align its strategy with clients' future business needs.

- **Initial model delivery support:** TransUnion provides a comprehensive framework that details the client roles, responsibilities, and essential tasks necessary for initial model delivery. This ensures all new clients are fully prepared for a smooth rollout and can quickly realize the benefits of their MMM.

- **User-friendly scenario planning:** TransUnion's scenario planning tool optimizes planning for specific KPIs and goals, sets campaign constraints, and offers easily adjustable parameters — all within an intuitive interface featuring clear visuals and color-coded charts for actionable insights.

Cautions

- **Slower product innovation:** TransUnion's product innovation remains slower than that of other Leaders. Its solution lacks key features such as the ability to automatically refresh models and provide creative element insights. Prospective clients should review the product roadmap to ensure future deliverables align with their expected growth.

- **Limited leadership engagement:** TransUnion reports a typical C-suite engagement frequency that is lower than that of other Leaders in the MMM market. Prospective clients looking to further engage their C-suite should ensure TransUnion prepares a suitable engagement plan.

- **Restricted creative measurement:** TransUnion's self-service capabilities for integrating creative scores and/or brand perception into clients' models lag behind those of many vendors. Its platform has minimal ability to compare creative and brand-level drivers of business outcomes. Prospective clients focused on creative effectiveness measurement should ensure additional tools are in place to support this.

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

C5i

Dropped

Nielsen: Nielsen was dropped because it exited the MMM market, selling its business to Circana. (The sale was completed in August 2025.)

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need to have offered their MMM solutions in general availability no later than 20 June 2022. In addition, a provider must meet criteria 1 and 2, plus any of 3, 4, or 5 in this list:

1. Have at least 10 paying clients for its MMM solution in each of the years 2022, 2023 and 2024.

2. Receive at least 55% of its calendar year 2024 MMM solution revenue from clients located in North America and/or Europe.

3. Have calendar year 2024 MMM solutions and service revenue of at least $20 million.

4. 2024 MMM solutions and service revenue of at least $15 million and at least 15 new customers (logos) in 2024 compared to 2023.

5. 2024 MMM solutions and service revenue of at least $10 million and at least 20 new customers (logos) in 2024 compared to 2023.

Providers that meet any of the following criteria have been excluded from this research:

- Owned by an advertising-supported publisher or digital platform.

- Owned by an organization that sells media planning services or media buying software or services.

- Offer media planning and/or buying services as a component of their offerings.

Evaluation Criteria

The evaluation criteria and weights describe the specific characteristics and their relative importance that support Gartner's view of the market. In this research, these criteria are used to comparatively evaluate marketing mix modeling solution providers.

Ability to Execute

Product/Service: The capabilities, features and overall quality of the core goods and services that compete in and or serve the defined market.

We specifically looked for speed to value, marketer adoption enablement, cross-functional adoption enablement, complex analytics and data management, in-housing business model and program, self-service data and modeling workbench, creative evaluation, brand tracking, and creative data taxonomy.

Overall Viability: The organization's overall financial health, as well as the financial and practical success of the relevant business unit. This includes the likelihood that the organization can continue to offer and invest in the product, as well as the product's position in the organization's portfolio.

We specifically looked for company viability, MMM practice viability, and MMM practice growth.

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

We specifically looked for sales success, sales staffing, and pricing.

Market Responsiveness and Track Record: The ability to respond, change direction, be flexible, and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This includes the provider's history of responsiveness to changing market demands.

We specifically looked for feedback mechanisms, closed-loop feedback, and effectiveness of feedback response.

Marketing Execution: The ability to deliver clear, high-quality, creative, and effective messaging via publicity, promotional activity, thought leadership, social media, referrals, and sales activities. This includes the organization's ability to influence the market, promote the brand, increase awareness of products, and establish a positive reputation among customers.

We specifically looked for investment, events, and thought leadership.

Customer Experience: The degree to which a vendor's products, services, and programs enable customers to achieve their desired results. This includes the quality of supplier/buyer interactions, technical support or account support, as well as ancillary tools, customer support programs, availability of user groups, and service-level agreements.

We specifically looked for support for clients, needs from clients for model development, and needs from clients for model finalization.

Operations: The ability of the organization to meet its goals and commitments. This includes the quality of its organizational structure, skills, experiences, programs, and systems that enable the organization to operate effectively and efficiently.

We specifically looked for staffing, employee growth, and data protection.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	Medium
As of 15 October 2025	

Source: Gartner (November 2025)

Completeness of Vision

Market Understanding: The ability to understand customer needs and translate that understanding into products and services. Vendors with a clear vision of the market listen to and understand customer demands, and they can shape or enhance market changes with their vision.

We specifically looked for understanding of the current market, clarity around the market direction, and buyer misperceptions of MMM.

Marketing Strategy: The ability to clearly communicate differentiated messaging, both internally and externally, through social media, advertising, customer programs, and positioning statements.

We specifically looked for self-awareness of differentiators, how vendors communicate their differentiators, and visibility.

Sales Strategy: The ability to create a sound strategy for selling that uses the appropriate networks including direct and indirect sales, marketing, service, and communication. This includes partnerships that extend the scope and depth of a provider's market reach, expertise, technologies, services, and their customer base.

We specifically looked for solution-market fit, segment-specific sales approach, cross-functional sales approach, approach to POCs, and approach to sales partner networks.

Offering (Product) Strategy: The ability to approach product development and delivery in a way that meets current and future requirements, with an emphasis on market differentiation, functionality, methodology, and features.

We specifically looked for delivery on roadmap, roadmap follow-through, and solution roadmap.

Business Model: The design, logic, and execution of the organization's business proposition.

We specifically looked for business model, customer tenure, and understanding of MMM market business models.

Vertical/Industry Strategy: The ability to strategically direct resources (sales, product, development), skills, and products to meet the specific needs of verticals and market segments.

We specifically looked for industry execution, industry partnerships, and business model execution.

Innovation: Marshaling of resources, expertise, or capital for competitive advantage, investment, consolidation, or defense against acquisition.

We specifically looked for product innovation, R&D, and reach of innovation.

Geographic Strategy: The ability to direct resources, skills, and offerings to meet the specific needs of regions outside the providers' home region, either directly or through partners, channels, and subsidiaries.

We specifically looked for regional availability, differences between regions, and region-specific client support.

Table 2: 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	Medium
Geographic Strategy	Low
As of 15 October 2025	

Source: Gartner (November 2025)

Quadrant Descriptions

Leaders

Leaders possess capabilities that enable them to provide deep support across nearly all aspects of MMM, particularly cross-functional adoption, complex analytics, and brand and creative support. They demonstrate the ability to address the needs of large enterprise clients, in part due to their capabilities to support MMM adoption throughout the enterprise. Leaders' roadmaps balance continued investments in software capabilities for mix models with advanced AI (generative and agentic) methods supporting self-guided user engagement with knowledge bases and reporting tools.

Challengers

Challengers offer functionalities across all of the assessed MMM solution capabilities, but may lack the depth of Leaders in certain places, particularly in terms of their support for complex global enterprises in which gaining the buy-in of nonmarketing stakeholders is critical for success. While they may show signals of innovation, they have not demonstrated commitment to adapting their product roadmap to align with emerging market needs, including in-platform support for complex marketing analytics, on par with Leaders. This situation may, in part, be a reflection of a desire to maintain ease of use.

Visionaries

Visionaries pursue emerging functionality for delivering MMM solution capabilities. These characteristics include modular platforms and flexible engagement models, which can help shape the direction for how this market enables clients to adapt mix models to their unique situations. These vendors' ability to execute may be hampered due to limited investment in R&D — which restricts how quickly they can deliver on features that catch up to those of Leaders.

Niche Players

Niche Players satisfy the foundational requirements of MMM solutions, meaning they offer basic scenario planning tools and recommendations for optimizing marketing investments focused on marketers, and generally to a narrower market segment in comparison to other vendors. Niche Players may excel in supporting clients with specific go-to-market models, unique needs, or midsize businesses. They typically lack the operations, product capabilities, or vision to expand their reach. Their limited functional capabilities' depth, in comparison to Leaders, could have its benefits in that clients may enjoy a more simplified product experience or a more individualized development experience.

Context

CMOs face mounting pressures:

- A tremendous increase in **macroeconomic and business volatility** affects both marketing results and planning. This increases the value of high-quality MMM scenario planning and other solutions that address enterprisewide challenges.

- **An enterprise focus on short-term priorities,** in reaction to macro volatility, challenges marketers focused on brand and other longer-term (or intangible) impacts. This increases the importance of demonstrable and explainable marketing investment benefits.

- **An "Era of Less"** persists, as postpandemic marketing budgets are less than three-quarters of prepandemic levels. As budgets stayed flat in 2025, CMOs have chosen to allocate more of their budgets to paid media, increasing the need to show returns.

MMM helps CMOs with all three of these pressures:

- **Planning for volatility —** Scenario planning capabilities make volatility *something to plan for* instead of *something to be impacted by*. MMM helps CMOs explore the changes in macroeconomic policy, weather variability, advertising creative, competitive tactics and marketing strategy, media plans, and distribution management needed to maximize sales or profits in each scenario. Sophisticated tools can identify the most likely scenarios based on trends. And vendors with extensive benchmark databases can estimate the impact of factors the business hasn't encountered before.

- **Counteracting a short-term focus —** The ability to distinguish between the short- and long-term effects of marketing helps CMOs mitigate the risks of a short-term focus. While there are multiple ways to calculate impact, CMOs should ensure their MMM vendor's software clearly distinguishes between the two, and that the vendor executes a collaborative and comprehensive model development plan (see **Case Study: Gain Buy-In for MMM Adoption Using Model Co-Creation** for a successful approach).

- **Managing budget and expectations —** The Era of Less demands that CMOs (1) set clear expectations with the C-suite about the limits of marketing's effectiveness in a volatile environment, and (2) maximize the impact of their budget, including media dollars. MMM can help CMOs do both. For example, if macroeconomic conditions cause sales to decline, even as marketing performance improves, CMOs can use MMM driver analysis to explain why. They might also use MMM scenario planning to predict depressed sales in 2Q but not 3Q, allowing them to manage C-suite expectations and perhaps shift marketing budget from 2Q to 3Q. MMM optimization calculators can also recommend media budget allocations to achieve a specific goal (e.g., a revenue target) in the context of unique constraints (e.g., a media contract that requires 30 days' notice and a fee to cancel).

To get started with selecting a first (or new) MMM provider, CMOs must first assemble a cross-functional team, then define their use cases and design their POCs (see **Quick Answer: Six Mistakes CMOs Make When Selecting a Marketing Mix Modeling Provider**).

Use this Magic Quadrant and the Critical Capabilities to shortlist two to four candidate providers. This evaluation focuses on how vendors service marketing effectiveness, enterprise mix modeling, in-housing, and brand impact estimation use cases for business users primarily in North America and Western Europe.

Market Overview

Marketing mix modeling's popularity is growing. Every vendor in this research reported healthy year-over-year increases in the size of their MMM businesses. Organizations have largely abandoned universal multitouch attribution solutions, as the largest ad platforms have made granular, person-level ad exposure data inaccessible beyond their proprietary data environments.

Three major trends are shaping the MMM solutions market for 2026:

Trend 1: New Entrants on Both Sides of the Market

On the supply side, the number of vendors offering MMM solutions continues to grow, with advertising agencies, professional services analytics firms, and many SaaS firms all entering the fray. This dramatic increase creates uncertainty for buyers trying to understand the differences between providers, so Gartner has set specific inclusion and exclusion criteria to help buyers separate the signal from the noise.

On the demand side, an influx of buyers new to MMM are trying to get started relatively simply and inexpensively. This highlights the need for broad market education about MMM and other methodologies, and solutions that meet the needs of this newcomer group.

Trend 2: Mix Modeling Isn't Just About Marketing Anymore

As marketers grapple with volatility and uncertainty, they struggle to separate cause and effect, and to prove the value of marketing to the C-suite. They increasingly need solutions that support them in volatile conditions and explain commercial results using marketing, enterprise nonmarketing, and external factors.

In response to marketers' growing need, MMM vendors are:

- **Including external business drivers —** By including external drivers, MMM solutions help CMOs deftly handle scenarios where marketing performance improves but business results decline. These drivers include changes in tariff rates, the spokespeople that competitors use in their advertising, distribution policies, inventory levels, and stockouts of individual SKUs in specific locations.

- **Simulating what hasn't happened before —** MMM offerings include simulation tools for what-if scenarios for the drivers mentioned above, plus other scenarios like the collapse of a competitor or a consumer boycott.

- **Measuring the impact of brand and creative —** MMM can separate the short-term impact of advertising from the long-term impact of brand. It can also distinguish between the effects of different types of creative (e.g., different messages, subjects, calls to action).

Vendors in this research provide such support at different levels. Some have extensive benchmark databases and clients in comparable situations, so they provide real-world-grounded estimates of impact for external factors. Some explicitly show short-term and long-term brand impact separately, and some can separate out the impact of different creatives.

Trend 3: Generative and Agentic AI Are Arriving

Vendors have incorporated both types of AI to support capabilities such as:

- Individualized onboarding guidance that directs new users to relevant reference resources

- Agentic AI data pipeline implementations to handle data ingestion and management

- Customized charts that can be exported to PowerPoint with AI-drafted performance narratives

- Natural-language interfaces for surfacing business results and key drivers

However, integration of these capabilities is still nascent, with some vendors focusing on data pipeline automation, while others have started with onboarding or customized charts.

Of these capabilities, the natural-language interfaces for surfacing business results have the broadest appeal because marketers prefer natural language explanation of data to charts or

tables. They're also the most challenging to get right. Prospective buyers must extensively validate this capability before purchase, to ensure that it succeeds in two ways:

- Avoids hallucinations with mission-critical data about business results

- Doesn't misinterpret the individual client's data by referring to other clients' data

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⊕ Evidence

⊕ Evaluation Criteria Definitions

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