

# Magic Quadrant for Personalization Engines

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Personalization remains a priority for digital marketing leaders. Relevant and timely messaging is key to educating customers, minimizing friction and building confidence in brand interactions. Use this research to assess personalization engines that enable you to deliver measurable results.

## Strategic Planning Assumptions

By 2025, 80% of marketers who have invested in personalization will abandon efforts due to lack of ROI, the perils of customer data management or both.

By 2022, 50% of personalization vendors will report lower projected revenue growth.

By 2021, 40% of marketers still employing personalization will prioritize digital commerce use cases over marketing, customer experience or both.

By 2021, one-third of marketers will reduce spending on personalization as a line item in the marketing budget.

## Market Definition/Description

### What Are Personalization Engines?

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Gartner defines personalization engines as:

Software that applies context about individual users to select, tailor and deliver messaging such as content, offers and other interactions through digital channels in support of three use cases: marketing, digital commerce and customer experience (CX).

The personalization process creates relevant, individualized interactions between a company and its audiences to enhance the recipient's experience. It uses insight based on unique recipient

behavioral data, as well as behavioral data of similar individuals, to deliver an experience to meet specific needs and preferences. Personalization capabilities can be found in stand-alone personalization engine software or embedded in applications such as web content management, content marketing, multichannel marketing hubs and digital commerce platforms (see “Magic Quadrant for Multichannel Marketing Hubs”). This Magic Quadrant focuses solely on vendors that offer personalization engines as stand-alone solutions.

Marketers typically use personalization engines in service of three primary use cases:

1. **Digital commerce** — to customize experiences across digital sales channels (such as web and mobile).
2. **Marketing** — to customize marketing campaign content, messaging and engagements across marketing and communication channels (such as web, email, paid search, advertising and mobile).
3. **Customer experience** — to customize online and offline experiences across business functions in service of increasing customer satisfaction, loyalty and advocacy (through touchpoints such as chatbots, digital kiosks and clienteling).

The core capabilities of personalization engines include:

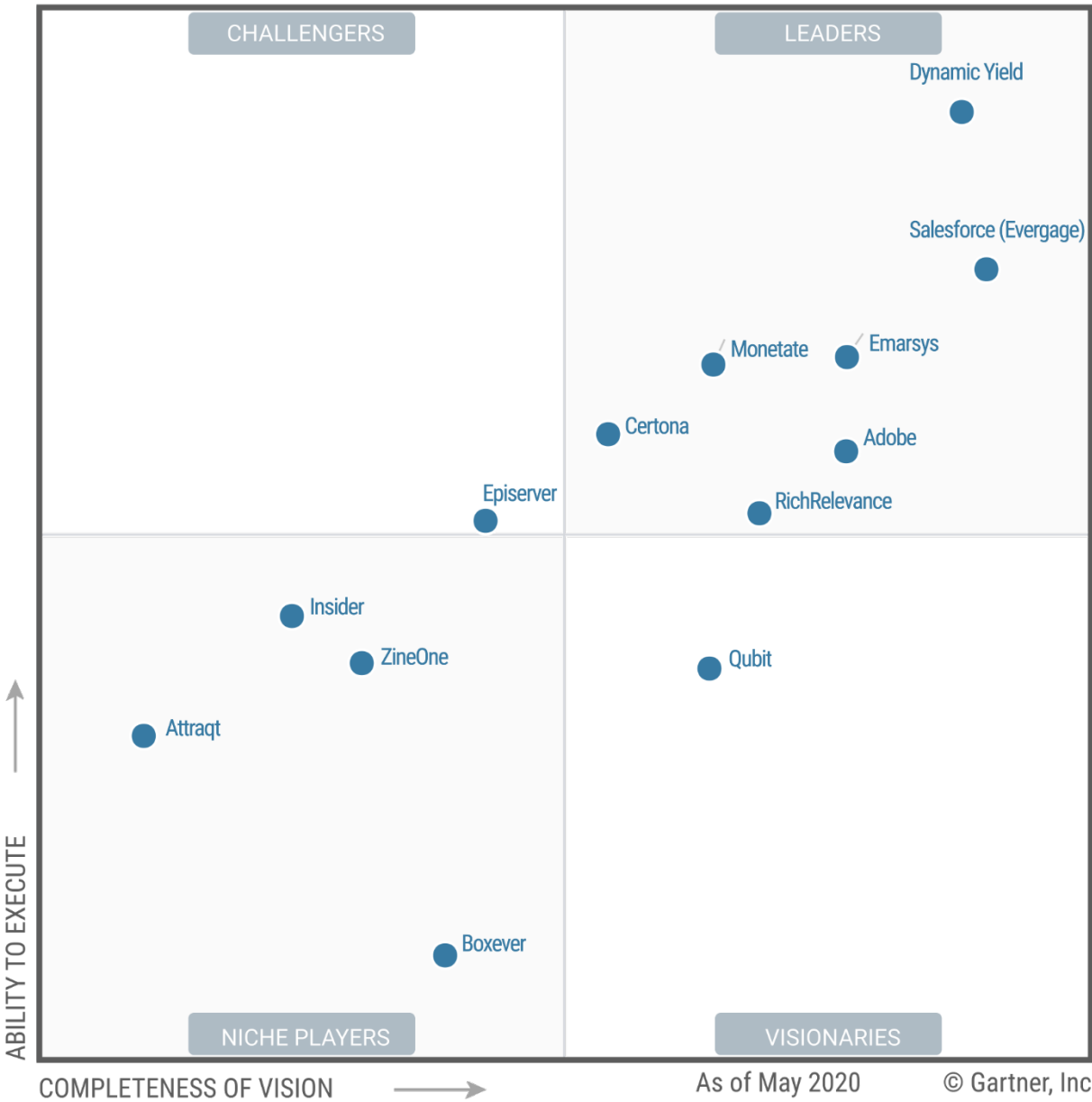
- In-session behavior tracking, data collection and ingestion
- Predictive analytics, data modeling and user segmentation
- A/B and multivariate testing, and algorithmic optimization
- Rule- and algorithm-based targeting across touchpoints
- Next best action or offer, and product and content recommendations
- Personalization performance tracking, measurement and reporting

Optional capabilities of personalization engines include:

- Account-based data structures and account-based scoring
- Recommended tests and goal-oriented optimization
- Bring your own algorithm (BYOA), bring your own model (BYOM) and custom data modeling
- Visual content editing and preview capabilities
- Customer feedback survey design and execution
- Customer feedback survey data collection and analysis

# Magic Quadrant

Figure 1. Magic Quadrant for Personalization Engines



Source: Gartner (July 2020)

## Vendor Strengths and Cautions

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### Adobe

Adobe is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Its Adobe Target product is mainly used to personalize marketing efforts, with most deployments found in North America. Clients tend to be marketers in large B2C enterprises, particularly those in retail and financial services. Adobe's product roadmap is focused on advancements in artificial intelligence (AI)/machine learning (ML), real-time decisioning, and data collection and integration. Plans are in the works to extend its "unified profile" feature to allow Adobe Target to read directly from customer profiles built in Adobe Experience Platform, reducing the time needed to integrate customer profile data.

### Strengths

- **Testing and optimization:** Adobe offers a breadth of testing types. The product provides users with ease of use and scalability through a "what you see is what you get" (WYSIWYG) editor, and features such as A/B testing with sequential hypothesis testing, user-defined goals and the ability to define conversion activities.
- **Measurement and reporting:** Adobe has improved its measurement and reporting capabilities. Specifically, Adobe has enabled users to set a baseline for reporting of Sensei AI-driven activities against "marketer-led" decisions as a control.
- **Targeting and triggering:** Adobe enhanced its targeting capability by providing users with greater flexibility in audience building, shared audiences via Adobe Experience Platform and a "Recommended for you" algorithm that uses category affinity and contextual data to target individualized product recommendations. In 2020, the company plans to add the ability for users to publish custom models built on Adobe Experience Platform into Adobe Target.

### Cautions

- **CX personalization:** Adobe Target lacks the native ability to collect user feedback, requiring custom partner integrations for customer survey design, execution and data collection. Client references also rated the company below average for its ability to drive CX personalization through its personalization engine.
- **Price and value:** Client references rated Adobe below average for pricing, value for money spent and contract negotiations. References cited issues with billing for use of product, especially at integration points with other Adobe products like Adobe Audience Manager.
- **Platform approach:** A large percentage of Adobe's growth comes from existing clients using other Adobe products. Client references noted that Adobe's personalization engine is stronger when combined with other parts of Adobe Experience Cloud such as Adobe Analytics. Marketers evaluating Adobe Target should consider this solution in the context of their existing martech stack.

## Attraqt

Attraqt is a Niche Player in its first year of inclusion in this Magic Quadrant. Its Experience Orchestration platform is broadly focused on algorithms optimized for specific industry verticals. Its operations are focused in Europe, with offices in the U.S. and Australia, and its clients tend to be marketers in midsize-to-large organizations in retail, manufacturing and media. Attraqt's acquisition of French personalization company "Early Birds" in 2019 has helped it expand its algorithmic learning and personalization capabilities beyond search and merchandising to include customer-intent-driven recommendations and offers to support conversion and marketing goals.

### Strengths

- **Digital commerce:** Attraqt's Experience Orchestration platform offers users strong merchandising capabilities and recommendation tools across categories, product detail pages and cart pages to ensure relevance across customer touchpoints. The platform's experience benchmarking feature supports team engagement and helps users get more out of the platform's features and capabilities.
- **Targeting and triggering:** Experience Orchestration's vertical-specific algorithms offer users a combination of rule-based and machine learning decisioning, with fallback options to optimize coverage for visitors. Customers can combine their own algorithms with those found in Attraqt's platform to support custom objectives.
- **Site performance:** Attraqt helps clients reduce website response latency due to personalization decisions with millisecond-level controls and metrics to help users ensure algorithm response times are within an acceptable range.

### Cautions

- **Marketing personalization:** While marketing personalization is the predominant use case for which client references chose Attraqt, it is most commonly used by client references for web personalization. Client references most often relied on custom implementations with another vendor to personalize retargeting and paid search.
- **Customer experience support:** Like Attraqt's marketing channel support, the platform's customer experience functionality is reliant on published APIs for all customer touchpoints. The platform supports survey design, but data collection and analysis require partner integrations.
- **Measurement and reporting:** Attraqt's native reporting capabilities are limited, with some visualization types and customized reporting dependent on partner integrations with other services, such as BigQuery and CSV exports to support dashboards. Client references reported low satisfaction levels with Experience Orchestration's native reporting capabilities.

## Boxever

Boxever is a Niche Player in this Magic Quadrant; in the last iteration of this research, it was also a Niche Player. Boxever's Omnichannel Personalization platform combines the company's customer

data platform (CDP), decisioning and experimentation products to support a broad set of personalization use cases. Its operations are geographically diversified, and its clients tend to be marketers in industries with elaborate customer journeys, such as travel, financial services and online gaming. In 2019, Boxever simplified the user experience for its customers by providing users with both “easy” and “expert” modes.

## Strengths

- **Rule management:** Boxever helps users easily manage numerous or complex personalization real-time rules through both a rule matrix and a decision canvas interface. The latter is a graphical decision process tool that helps users visualize complex decisioning workflows and facilitate user collaboration around personalization rules.
- **CX use cases:** Boxever supports a wide variety of customer experience use cases. The platform provides tailored help features, such as personalized in-app notifications, as well as call center containment, such as personalized updates on the status of a lost credit card. The platform has native customer survey capabilities, including several insertion templates to support a wider variety of survey notifications.
- **Solution flexibility:** Boxever’s open architecture provides users with flexibility in platform use, resulting in client references selecting the platform for a broader set of reasons than any other vendor in this research. In addition to common personalization use cases, this flexibility helped some references improve operational efficiencies, enhance decision making and bolster customer service.

## Cautions

- **Deployment:** Client references reported longer-than-average deployment times for Boxever, with most deployments taking three to six months. References also reported below-average satisfaction with the platform’s ease of deployment and the overall deployment and integration process.
- **B2B support:** Boxever is exclusively focused on B2C customers, and its personalization engine lacks several capabilities often useful for B2B-specific personalization, such as support for account-based data structures, account scoring and role-based targeting.
- **Digital commerce support:** Boxever does not currently support personalized visual search for digital commerce channels and comes with few out-of-the-box commerce-centered reporting templates compared to other vendors evaluated in this research. However, users can create their own reports via the integrated Looker dashboards provided with the platform.

## Certona

Certona is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Its personalization engine is mainly focused on digital commerce use cases through robust product recommendations and merchandising capabilities. Its operations are mostly focused in North America, with some clients in Europe and Asia. Certona’s clients tend to be marketers in midsize-to-large retail and wholesale organizations. As part of Kibo’s Personalized Commerce Cloud suite,

Certona is focusing future investments on strengthening its omnichannel digital commerce personalization capabilities.

## Strengths

- **Product recommendations:** Certona's personalization engine offers users enhanced product recommendation and search capabilities. The platform supports artificial intelligence models, enabling predictive visual search that recommends visually similar products based on a customer's browsing behavior. The engine also comes with slotting capabilities to support merchandising objectives, like space utilization and pick efficiency.
- **Data and analytics:** Kibo's acquisition of Monetate in 2019 — another vendor evaluated in this research — added new analytics capabilities to Certona's product; notably, the audience builder tool to support personalized experiences for defined segments. Overall, client references gave high scores for Certona's analytics capabilities.
- **Testing and optimization:** Client references consistently score Certona's testing and optimization capabilities above average. In addition to existing A/B and multivariate testing, the company's plans for enhancements include testing image-based variables and controls over testing timing and variable weighting.

## Cautions

- **Operations and support:** Client references reported longer-than-average deployment times for Certona's solution. References and Gartner Peer Insights reviews indicate challenges in communication and issue resolution, resulting in lower-than-average service and support scores.
- **Customer experience:** While the full breadth of CX personalization capabilities is native to Certona's platform, the company's lack of ongoing focus in this area may present concerns for marketers prioritizing personalization in CX.
- **Marketing channel support:** Certona's emphasis is on digital commerce personalization, not marketing personalization. Additional Kibo products are required to support marketing channels such as mobile messaging and digital advertising.

## Dynamic Yield

Dynamic Yield is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Its platform is focused on offering robust digital commerce personalization capabilities. While its deployments are mainly split between the Americas and Europe, the company expanded operations into Barcelona and Japan in 2019. Most of its clients are midsize and large corporations in retail, transportation, media and financial services. Dynamic Yield's roadmap is focused on providing users more robust analytics capabilities through self-service data and segmentation capabilities.

## Strengths

- **Targeting and triggering:** Dynamic Yield's AI-based "predictive audiences" feature allows users to automatically create audiences based on ad hoc conditions or predictive behavior, like exit intent. The platform triggers personalized content based on in-page behaviors, like hovering over a specific element. In 2020, the company plans to enhance its triggered email functionality with the ability to trigger email messaging based on behavioral algorithms.
- **User-friendly testing:** Dynamic Yield is praised for its ability to run complex tests while offering its users a simple user interface without having to rely on developers. It recently improved its preview testing while enhancing flexibility and user control. The company also added a library of content templates for users to choose from to accelerate test design and setup.
- **Personalized recommendations:** Dynamic Yield earned among the highest client reference scores of any vendor in this evaluation for its digital commerce personalization. It allows users to automatically adjust the site experience by using customer behavior and deep learning algorithms to predict product interest, reorder category pages and personalize search results. It also offers 17 out-of-the-box product recommendation strategies, including strategies based on context and offline transactions.

## Cautions

- **Marketing personalization:** Although Dynamic Yield supports marketing personalization, client references rated it slightly below average in this area. Aside from improvements to triggered emails, most of Dynamic Yield's recent and planned improvements reside outside of marketing use cases.
- **Measurement and reporting:** While Dynamic Yield made improvements to measurement and reporting — especially for advanced users through a performance dashboard — client references cited issues with data transparency, particularly with visibility into how data is used and with verifying specific recommendations. They also reported bugs and difficulties with data queries for reporting across multiple campaigns.
- **Ownership structure:** Since Dynamic Yield is owned by the McDonald's Corp., members of the McDonald's Corp. board of directors review all Dynamic Yield deals. Its ownership by McDonald's Corp. prevents Dynamic Yield from selling to other quick-service restaurants.

## Emarsys

Emarsys is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Emarsys' Personalization Platform leverages a broad suite of customizable templates to meet the needs of both nontechnical and technical users and accelerate time to value for its clients. Its operations are geographically diversified, and its clients tend to be marketers in the retail, travel and media industries. In 2019, Emarsys continued investments in verticalizing data schema, reporting and personalization templates to accelerate new client onboarding in retail, digital commerce and travel.



## Strengths

- **AI capabilities:** A wide variety of prebuilt machine learning models helps marketers trigger and optimize marketing campaigns, which likely contributed to above-average client reference scores for targeting and triggering, as well as testing and optimization. The platform's recently added "visual affinity" feature allows users to add unstructured data (i.e., images) to typical structured data to improve product recommendations.
- **Reporting:** Multiple, well-designed reports allow users to view platform performance from an overall campaign or customer level. Client references rated Emarsys' reporting capabilities above average across vendors evaluated in this research, with vertical-specific reporting tiles reducing the need for brands to customize out-of-the-box reports.
- **Rapid time to value:** Client references gave Emarsys high scores for ease of deployment and overall value received. Several references cited the platform's intuitive workflow, ease of creating automated campaigns and existing templates as contributing factors to their high scores.

## Cautions

- **Native CX support:** While Emarsys' platform can natively support clienteling and customer service applications, it does not support native survey creation capabilities. CX touchpoints such as chatbots and digital kiosks are supported via APIs.
- **Lack of enterprise focus:** The majority of Emarsys' customers are small and midsize businesses, resulting in Emarsys having among the highest proportion of small deals (under \$50,000 annually) of all vendors evaluated in this research. Marketers in large enterprises with complex organizational structures considering Emarsys should ensure the platform's client success teams can meet their needs.
- **Horizontal technology requirements:** With Emarsys offering several deeply integrated modules as part of its personalization platform, marketers may face integration challenges when connecting the core decisioning platform into their existing martech stack. For example, marketers considering Emarsys' solution should carefully evaluate how the solution might impact current martech deployments, such as an existing CDP.

## Episerver

Episerver is a Challenger in this Magic Quadrant; in the last iteration of this research, it was also a Challenger. Episerver's personalization suite sits in the stand-alone Intelligence Cloud and is most often used to personalize marketing content, promotions and campaigns, with deployments focused in Europe and the Americas. Its clients tend to be upper-middle-market manufacturing, high tech and retail marketers. Episerver is focusing investments in data and analytics, including enabling users to transform unstructured content into a format readable by its natural language processing (NLP) engine and expanding third-party data integration and enrichment.

## Strengths

- **Data and analytics:** Episerver's native NLP-based data enrichment enables enhanced segmentation and targeting. The platform includes native identity resolution and automated profile matching and clustering based on journeys, dynamic segmentation and behavioral analysis. The platform offers users with models based on customer interest and intent to automatically trigger personalized content and product recommendations.
- **Content personalization:** Bolstered by its recent acquisition of content personalization and analytics platform, Idio, Episerver allows users to automate content tagging and personalize content recommendations. The company plans to enhance content recommendations by providing users the ability to predict the performance of edits before publishing based on machine learning content analytics.
- **B2B personalization:** Episerver stands out for its ability to manage and analyze account-based data structures common among B2B companies, including clustering based on account characteristics. It also offers customers the ability to target anonymous users based on real-time behavior or data enrichment, including organizational hierarchy or reverse-IP look-up for B2B buyers.

## Cautions

- **Marketing personalization:** Episerver's personalization suite earned below-average scores from client references for marketing personalization. While it natively supports web, email and retargeting personalization, client references reported having to rely on other Episerver solutions to personalize additional marketing efforts, such as digital advertising and paid search.
- **Partner dependencies:** While Episerver's personalization engine offers data integration via its CDP and extensibility into third-party CDPs, it relies on partner integration for data modeling templates.
- **Market understanding and awareness:** Client references rated Episerver below average for its ability to understand their needs, and it is in the bottom-third of customers' consideration set among vendors evaluated in this research. While Episerver met 2019 revenue projections, annual revenue growth for its personalization engine is below the average growth of vendors in this research.

## Insider

Insider is a Niche Player in its first year of inclusion in this Magic Quadrant. Its Growth Management Platform allows less-technical users to leverage the platform's AI-driven capabilities through industry-specific templates, such as itinerary abandonment versus coupon management. Insider's operations are mostly focused in Europe and APAC, and its clients tend to be marketers within retail, travel and telecommunications. In 2019, Insider expanded its template library with several advanced templates that help users bolster product discovery through mobile web and apps.

## Strengths

- **Templates accelerate adoption:** Insider's Growth Management Platform contains a broad set of templates and prebuilt functionality across the personalization engine. For example, the platform comes with prebuilt opt-in templates, a mobile template store and a diverse set of prebuilt triggers by channel. These templates contribute to Insider's above-average scores for ease of deployment compared to other vendors evaluated in this research.
- **Product discovery:** Insider's platform offers multiple ways to support product discovery, including easy-to-use product badging and visual search personalization. Specific to mobile, Insider recently added advanced templates to promote browsing behavior on smaller screens.
- **Point-and-click predictions:** In addition to providing users prebuilt machine learning models for common use cases — such as likelihood to purchase, sensitivity to discounts and product interest groups — Insider offers a “custom action model.” This feature allows users to define any action through a WYSIWYG editor, while the platform automatically builds a user-level propensity model for that action.

## Cautions

- **Limited North American coverage:** In contrast to its localized support in other markets, Insider only has a handful of clients and no offices in the United States. U.S. marketers considering Insider should ensure that the company's client success teams have enough availability and relevant experience to meet their needs.
- **Limited native CX capabilities:** While Insider offers well-integrated survey features, it does not have native capabilities for customer service or clienteling applications, digital kiosks, or chatbots — all of which Insider supports through APIs.
- **Lack of advanced testing features:** While the platform offers users complete A/B testing capabilities, including the ability to test different recommendations strategies, it lacks other advanced testing features such as contextual or multiarm bandit algorithms or automated results segmentation.

## Monetate

Monetate is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Its personalization engine is broadly focused on helping users personalize experiences based on customer intent across critical customer touchpoints. Monetate's operations are focused in North America and Europe, and its clients tend to be marketers in midmarket and enterprise B2C and B2B organizations. In 2019, Monetate was acquired by Kibo. This acquisition has allowed Monetate to integrate recommendation capabilities from Certona — another personalization vendor evaluated in this research and owned by Kibo — into its personalization engine.

## Strengths

- **Targeting and triggering:** Monetate achieved consistently high scores from client references for its targeting and triggering capabilities. Multiarm and contextual bandit algorithms support recommendations based on the top-performing variables for the majority of visitors as well as individual contextual considerations. Its “audience discovery” feature helps users easily identify relevant audiences and determine next best actions.
- **Testing and optimization:** Client references praised Monetate’s user-friendly testing and optimization capabilities, which include templates, previews and an HTML editor. The platform’s machine learning capabilities help users personalize content, website layout and navigation, and offer and product recommendations. Monetate’s “Audience Explorer” functionality helps users detect and filter segments and estimate the impact of personalization on specific audiences.
- **Digital commerce recommendations:** Monetate received above-average scores from client references for its digital commerce capabilities. Kibo’s acquisitions allow Monetate users to leverage Certona’s search and recommendation capabilities. Monetate recently integrated a recommendation slotting feature previously available in Certona and plans to add predictive slotting this year.

## Cautions

- **Customer understanding and responsiveness:** Client references expressed frustration with Monetate’s ability to understand their needs, contributing to a below-average score in this area. While the platform’s overall level of service and support is above average compared to other vendors evaluated in this research, references reported slow or incomplete responses to questions.
- **Data and analytics:** Client references rated Monetate’s data and analytics capabilities below average, with some references citing a desire for additional depth of analysis. Currently, the personalization engine requires additional partnerships to allow for deeper analytics capabilities.
- **Limited geographic reach:** Monetate’s deployments are heavily concentrated in North America and Europe. Marketers in other regions considering Monetate should ensure the company can support and effectively meet their needs, especially considering the company’s below-average client reference scores for market responsiveness.

## Qubit

Qubit is a Visionary in this Magic Quadrant; in the last iteration of this research, it was also a Visionary. Its three-tiered personalization products are mainly focused on offering tailored personalization capabilities based on the customer’s level of maturity. Its operations are mostly focused in Europe and the U.S., and its clients tend to be marketers in B2C retail, travel and financial organizations. Qubit’s future roadmap prioritizes actionable insights, a more automated personalization experience for marketers and zero-party user privacy.

## Strengths

- **Digital commerce recommendations:** Qubit's strength lies in its robust digital commerce capabilities, which are offered across all three product tiers. Users can use visual editing tools in the platform's UI to control rule-based and algorithmic recommendations, enabling merchandisers to control product placements.
- **Customer understanding:** Qubit demonstrates a clear understanding of both the potential in sophisticated, automated personalization and the challenges in driving adoption across different business-user segments. That understanding is apparent in Qubit's commitment enabling nontechnical users to take full advantage of the product and reference clients' evaluation of Qubit's market responsiveness.
- **Testing and optimization:** Qubit's personalization engine supports both technical and nontechnical users with native and custom testing capabilities. Technical users can test their own models via a data science workbench, while business users can test within guardrails to protect the end-user experience.

## Cautions

- **Customer experience personalization:** Qubit's personalization engine ranks below average for the customer experience personalization use case. While the platform natively supports survey design and data collection, chatbots and voice assistants require partner integrations.
- **Data and analytics:** While Qubit invested in improving its data and analytics capabilities with the addition of predictive modeling, client reference scores in this area were below average compared to other vendors evaluated in this research. Despite the platform offering additional consumer privacy controls, users must manually maintain General Data Protection Regulation (GDPR) compliance tools to search for subjects, data exports and deletions.
- **Measurement and reporting:** Despite Qubit's roadmap demonstrating a commitment to improving insights-based decision making for all users across use cases, Qubit's scores for measurement and reporting were slightly below average compared to other vendors evaluated in this research.

## RichRelevance

RichRelevance is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Its Personalization Cloud product focuses on personalizing retail experiences across touchpoints in the customer journey. RichRelevance's operations are geographically diversified, and its clients tend to be marketers in midsize and enterprise retail organizations. RichRelevance's joint go-to-market strategy with Manthan Software is expected to enable ongoing predictive customer journey optimization and allow the platform to expand into new personalization use cases and verticals.

## Strengths

- **Data and analytics:** RichRelevance's real-time data streaming architecture incorporates probabilistic householding as well as individual customer profiles, offering additional context for customer decision making. Users can test their own strategies and models using the platform's native data science workbench.
- **Digital commerce recommendations:** In 2019, RichRelevance introduced new digital commerce capabilities, including enhanced controls for cross-selling strategies. RichRelevance also invested in a refreshed UI and reporting enhancements within the platform's experience browser tool.
- **Targeting and triggering:** Decisioning is supported by combined real-time behavioral and offline data to interpret customer context and determine next best actions. RichRelevance's roadmap includes AI features for predictive journey optimization and neural networks to support better understanding of consumer preferences in visual content.

## Cautions

- **Customer experience:** Because users typically rely on RichRelevance for its marketing and digital commerce capabilities, customer experience is not a significant area of focus for the company. As a result, CX touchpoints are largely reliant on integrations and APIs.
- **Measurement and reporting:** While RichRelevance offers robust key performance indicator (KPI) and retail-centric reporting capabilities and contextual insights, client references rated the platform's measurement and reporting capabilities below average. References cited limitations with exporting data to other systems. This may be addressed through the recent merger of RichRelevance and Manthan, which expands data sources and enhances data exports, making them more configurable.
- **Steep learning curve:** Client references gave RichRelevance low ratings for ease of deployment and integration, though references reported that initial hurdles were often attributed to a steep learning curve.

## Salesforce (Evergage)

Evergage is a Leader in this Magic Quadrant; in the last iteration of this research, it was also a Leader. Its Evergage 1 platform focuses on delivering personalization use cases by collecting user data in real time and employing machine learning algorithms. Its operations are focused in North America, and its clients tend to be in retail, software and financial services verticals. Evergage was acquired by Salesforce in February 2020, but still sells its platform as both a stand-alone solution and as part of the Salesforce Marketing Cloud. In 2020, Evergage plans to invest in building deeper integrations with the Salesforce ecosystem.

## Strengths

- **Granular optimization:** The Evergage 1 platform boasts well-integrated, customizable contextual bandit algorithms that generate finer-grained optimizations for smaller audience

groups over time automatically. In addition, the platform includes an alerting system that highlights segment-level personalization opportunities across all active campaigns.

- **Data science support:** In addition to a new data science workbench and expanded analytics schemas, the Evergage 1 platform includes features to support citizen data scientists. For example, Evergage 1 includes a graphical interface to help citizen data scientists create and test unique algorithmic recipes that include a mixture of prebuilt and imported algorithms, along with business rules.
- **Real-time decisioning:** Evergage combines clicks, scroll depth, dwell time and cursor behavior to create a more complete real-time user profile that can be used for triggering and personalizing actions. Several client references praised the real-time analytics capabilities supported by this data stream.

## Cautions

- **Declining customer experience:** Evergage's overall service and support ratings from client references dropped year over year, and the company is now rated below average across vendors evaluated in this research. Associated scores in technical support and response times are also below average.
- **Salesforce-focused roadmap:** Evergage's roadmap details over the next year focus on developing connectors within the Salesforce ecosystem. While a potential benefit for existing Salesforce Marketing Cloud clients, users requiring third-party connectors should ensure they understand the level of continuing support that Evergage will provide.
- **Native marketing support:** Evergage supports digital advertising and paid search through proprietary integrations with named partners, whereas most other Leaders in this research provide these capabilities natively. Marketers considering Evergage that wish to personalize either channel should carefully evaluate the company's related capabilities and future roadmap to ensure the platform will meet their demands.

## ZineOne

ZineOne is a Niche Player in its first year of inclusion in this Magic Quadrant. Its Intelligent Customer Engagement (ICE) platform, often used for digital commerce personalization use cases, focuses on helping users leverage in-session behavior and machine learning to optimize key moments in a customer's purchase experience. Its operations are predominantly in North America, and its clients tend to be midmarket and large corporations in retail, telecommunications and financial services.

## Strengths

- **Data processing and analytics:** ZineOne allows users to ingest and process large amounts of real-time and batch data, integrate that data into customer profiles, and use it for predictive analytics and predictive models. Users can, for example, use ZineOne for behavioral modeling while also predicting the impact of customer behavior on retail store traffic and inventory levels.



- **Targeting and triggering:** Client references rated ZineOne above average for its ability to target and trigger offers and next best actions. ICE helps users target content, products, offers, notifications and reminders based on weather, location and in-store signals. Real-time data capabilities include detecting complex event patterns, updating machine learning scores and algorithmic decisioning that combines individual context with aggregate data trends.
- **Market responsiveness and innovation:** Client references rated ZineOne above average for its ability to understand their needs and praised the platform's customer development capabilities and rapid platform evolution. The company's future plans include offering prebuilt experience templates to enable users to trigger personalized, in-session actions for consumers across digital channels.

## Cautions

- **Gaps in testing functionality:** Compared to other vendors evaluated in this research, ZineOne's client references rated the platform below average for testing and optimization. ZineOne lacks native support for automated, recommended and AI-based testing, as well as goal-oriented optimization, and depends on custom integrations with other vendors for advanced testing.
- **Limited CX personalization:** ZineOne has limited native support for personalizing customer experience interactions outside of marketing and digital commerce channels. The company lacks support for survey design, execution and data analysis.
- **Lack of B2B support:** ZineOne is predominantly focused on B2C use cases with no dedicated B2B personalization capabilities, such as account-based data structures or account-based scoring. The company's roadmap does not indicate plans to expand support for B2B personalization or a future focus on this part of the market.

## 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

The following vendors were added to this Magic Quadrant based on the relevance of their offerings to the personalization engine market and the frequency with which Gartner clients have raised questions about their capabilities in the past year:

- Attraqt
- Insider
- ZineOne



## Dropped

The following vendors were dropped from this Magic Quadrant based on a combination of factors, including changes to vendor focus or strategy, deprecation of product features and shifts in our understanding of vendor capabilities that made them less relevant to the market for personalization engines:

- Acquia
- IgnitionOne
- Oracle
- Reflektion

## Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that analysts believe are necessary for inclusion in this research.

For inclusion in the 2020 Magic Quadrant for Personalization Engines, Gartner focused on vendors that offer personalization software, as described in the Market Definition/Description section, available and sold as stand-alone solutions. Vendors needed to affirm that their personalization product capabilities were generally available in the market as of **1 January 2020**.

To qualify for inclusion, vendors must support all the following:

- **Stand-alone Personalization Engine Product:**
  - Marketers can and do purchase and use the personalization engine product offered by the vendor without requirement to purchase or implement additional products sold by the vendor (e.g., content management system, multichannel marketing hub, digital commerce platform, analytics solution).
  - A marketer can integrate and use the company's personalization engine product with other products sold by other vendors (e.g., content management system, multichannel marketing hub, digital commerce platform, analytics solution).
- **Data and Analytics:**
  - Native ability to track user behavior; collect and/or ingest and match user-level data from multiple sources; capture or ingest opt-in/opt-out.
  - Native ability to conduct basic and advanced data analysis.
- **Testing and Optimization:**
  - Native ability to design and conduct basic and advanced testing, such as A/B and multivariate testing, and optimization based on algorithms.

- **Targeting and Triggering:**
  - Native decision engine capable of performing rule-based and algorithm-based segmentation for targeting; determining next best action or offer; and delivering product and/or content recommendations based on rules and algorithms.
- **Marketing Channel Support:**
  - Native ability to trigger and render personalized content, offers, messaging and/or experiences:
    - To both anonymous and known users.
    - Via web, email marketing and at least three additional marketing channels, including but not limited to mobile app engagement, mobile messaging (i.e., SMS, MMS), digital advertising, retargeting and paid search.
- **Digital Commerce Support:**
  - Native ability to trigger and render personalized content, offers, messaging and/or experiences:
    - To both anonymous and known users.
    - Via a native visual design interface or visual editor.
    - Through elements of digital commerce sites, mobile commerce sites, mobile commerce applications and point of sale (POS) including but not limited to homepage(s), category landing page(s), product detail page(s), on-site search and navigation, and product recommendations.
- **Customer Experience Support:**
  - Native or non-native ability to execute customer surveys, gather and incorporate user feedback, collect and/or ingest and analyze customer survey data.
  - Native ability to trigger and render personalized experiences beyond sales and marketing, online and/or offline:
    - To both anonymous and known users.
    - Across touchpoints, including but not limited to chatbots, voice assistants, digital kiosks, clienteling applications and call centers (including interactive voice response [IVR]).
- **Measurement and Reporting:**
  - Native ability to track, measure and report performance and performance improvements; native ability to provide standard and custom reporting, dashboards and data visualization.

## Market Presence and Momentum

For inclusion in the 2020 Magic Quadrant for Personalization Engines, vendors must have achieved annual software revenue from the sale or license of the personalization engine product of \$10 million or greater based on 2019 or most recent fiscal year end, not including services. In addition, qualifying vendors must have demonstrated growth as measured by either:

- A minimum of 25 net new customer deployments of the personalization engine product in 2019 (not including pilots)
- A minimum of 20% year-over-year growth in annual software revenue when compared to 2018

## Evaluation Criteria

### Ability to Execute

Vendors are judged on Gartner's view of their ability and success in making their vision a market reality that customers believe is differentiated and are prepared to buy into. Delivering a positive customer experience — including sales experience, support, product quality, user enablement, availability of skills and ease of upgrade/migration — also determines a vendor's Ability to Execute.

In addition to the opinions of Gartner's analysts, the evaluations and commentary in this report are based on several sources:

- Customers' perceptions of each vendor's strengths and challenges, as gleaned from their analytics and personalization-related inquiries with Gartner
- An online survey of vendors' customer references
- A questionnaire completed by the vendors
- Vendor briefings, including product demonstrations, strategy and operations
- Secondary research into market trends and vendors

### Ability to Execute Criteria

#### Product or Service

These are core goods and services that compete in and/or serve the defined market. They include current product and service capabilities, quality, feature sets, and skills. These should be offered natively, except where detailed in the subcriteria.

We look for native capabilities in the following areas:

- **Data and Analytics**

- Breadth of data sources, including but not limited to collect and/or ingest session or browsing data, geolocation data, behavioral and transaction data; support for data onboarding, matching, transformation and bidirectional data flow; support for identity resolution, including deterministic and probabilistic identification and device matching; profile and preference (e.g., opt-in/opt-out) management; support for GDPR compliance (e.g., right to data access, right to erasure, double opt-in to communications).
- Native analytical capabilities, including but not limited to statistical and predictive analysis, customer analytics and customer journey analytics; AI-driven analysis; ability to modify, upload or import algorithms; support for B2B (e.g., account-based data structures, account-based scoring, support for customers with insufficient datasets).
- **Testing and Optimization**
  - Breadth of native testing and optimization capabilities, including but not limited to recommended tests, support for test setup, goal-oriented optimization; modeling; availability of data modeling templates; custom data modeling capabilities; ability to modify, upload or import models.
- **Targeting and Triggering**
  - Native decision engine capable of performing rule-based and algorithm-based segmentation for targeting; determining next best action or offer; and delivering product and/or content recommendations based on rules and algorithms; role-based targeting to support B2B personalization.
- **Marketing Channel Support**
  - Breadth of marketing channel support, including but not limited to native ability to trigger, render and preview personalized content, offers, messaging and/or experiences to both anonymous and known users via web, email marketing and at least three channels. These channels include, but are not limited to, mobile application engagement, mobile messaging, digital advertising, retargeting and paid search.
- **Digital Commerce Support**
  - Breadth and sophistication of digital commerce support, including but not limited to native ability to trigger, render and preview personalized content, offers, messaging and/or experiences to both anonymous and known users via a native visual design interface or visual editor. It includes the ability to trigger personalization of elements of digital commerce sites, mobile commerce sites, mobile commerce applications and POS including, but not limited to, homepage(s), category landing page(s), product detail page(s), on-site search and navigation, and product recommendations.
- **Customer Experience Support**
  - Ability to design, target, tailor and present customer surveys; ability to collect and/or ingest, store, analyze and report survey response data, including customer experience metrics; support for integrating survey responses into customer profiles and using response data for CX optimization and personalization.

- Breadth and sophistication of customer experience support, including, but not limited to, native ability to trigger, render and preview personalized experiences beyond sales and marketing, online and/or offline to both anonymous and known users across touchpoints. These include chatbots, voice assistants, digital kiosks, clienteling applications and call centers (including IVR).
- **Measurement and Reporting**
  - Breadth of native tracking, measurement and out-of-the-box and custom reporting capabilities; availability of dashboards and data visualization capabilities, including, but not limited to, journey mapping or visualization.

### **Overall Viability**

Viability includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. It helps determine the likelihood of the organization to continue to offer and invest in the product, as well as the product position in the current portfolio.

### **Sales Execution/Pricing**

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

### **Market Responsiveness and Track Record**

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

### **Marketing Execution**

The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This awareness can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities.

### **Customer Experience**

Products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, availability of user groups and service-level agreements.

## Operations

The ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	Medium
Operations	Medium

Source: Gartner (July 2020)

## Completeness of Vision

Vendors are rated on Gartner's view of their understanding of how market forces can be exploited to create value for customers and opportunity for themselves. The Completeness of Vision assessments and commentary in this report are based on the same sources described in the Ability to Execute section.

When determining Completeness of Vision for the Offering (Product) Strategy criterion, Gartner evaluated vendors' ability to support the key use cases that will drive business value in 2020 and beyond. Existing and planned products and functions that contribute to these use cases were factored into each vendor's score for the Offering (Product) Strategy criterion (listed below for Completeness of Vision). These key themes (by category) are described below.

### Market Understanding

Ability to understand customer needs and translate them into products and services. Vendors show a clear vision of their market. These vendors listen, understand customer demands, and can shape or enhance market changes with their added vision.

### Marketing Strategy

A clear, differentiated messaging consistently communicated internally and externalized through social media, advertising, customer programs and positioning statements.

### Sales Strategy

A sound strategy for selling that uses appropriate networks, including direct and indirect sales, marketing, service, and communication. These vendors partner with customers to extend the scope and depth of their market reach, expertise, technologies, services and their customer base.

### Offering (Product) Strategy

An approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements.

### Business Model

The design, logic and execution of the organization's business proposition to achieve continued success.

### Vertical/Industry Strategy

A vendor's strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. We look for a strategy that:

- Extends beyond the retail vertical
- Extends across client revenue models (i.e., B2B, B2C, both, B2B2C)

### Innovation

Direct, related, complementary and synergistic allocations of resources, expertise or capital for investment, consolidation, and defensive or preemptive purposes.

### Geographic Strategy

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

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2020)

## Quadrant Descriptions

### Leaders

Leaders are vendors that demonstrate a solid understanding of the product capabilities and commitment to customer success that buyers demand in the current market. This is coupled with an easily understandable and attractive pricing model that supports proof of value, incremental purchases and enterprise scale. In the modern personalization engine market, purchase decision makers demand easy-to-use and easy-to-buy products. They require that these products deliver clear business value and deliver results with limited technical expertise and without the requirement for upfront involvement from IT. In a rapidly evolving market with constant innovation, a Leader must also demonstrate that it is not focused only on current execution. It must have a robust roadmap for solidifying its position as a future market leader, thus protecting the investment of today's buyers.

### Challengers

Challengers are well-positioned to succeed in the market. However, they may be limited to specific use cases, technical environments or application domains. Their vision may be hampered by the lack of a coordinated strategy across the various products in their platform portfolios. Alternatively, they may lack the marketing efforts, sales channel, geographic presence, industry-specific content or awareness of the vendors in the Leaders quadrant.

### Visionaries

Visionaries have a strong and unique vision for delivering marketing personalization capabilities. They offer depth of functionality in the areas they address. However, they may have gaps relating to



broader functionality requirements, or lower scores on customer experiences, operations and sales execution. Visionaries are thought leaders and innovators, but they may be lacking in scale, or there may be concerns about their ability to grow and still provide consistent execution.

## Niche Players

Niche Players do well in a specific segment of the personalization engine market — such as breadth of channels served, measurement and reporting, or user-profile management — or have a limited capability to out-innovate or outperform other vendors. They may focus on a specific domain or aspect of personalization but are likely to lack depth of functionality elsewhere. They may also have gaps relating to broader platform functionality or have less-than-stellar customer feedback. Alternatively, Niche Players may have a reasonably broad personalization engine offering, but limited implementation and support capabilities or relatively limited customer bases (such as in a specific geography or industry). In addition, they may not yet have achieved the necessary scale to solidify their market positions.

## Context

This research highlights digital marketing leaders' increasing reliance on personalization technology for business advantage. It is an assessment of vendor capabilities based on past execution in 2019 and future development plans; however, it may only be valid at a point in time, as vendors and the market continue to evolve.

To that end, readers should not use this Magic Quadrant in isolation as a tool for vendor selection. When making specific tool selection decisions, use it with our companion “Critical Capabilities for Personalization Engines” research, analysis publications related to personalization best practices and our analyst inquiry service. Readers should be careful not to ascribe their own definitions of Completeness of Vision or Ability to Execute to this Magic Quadrant, which they often incorrectly map narrowly to product vision and market share, respectively. The Magic Quadrant methodology factors in a range of criteria in determining position, as shown by the extensive Evaluation Criteria section.

## Market Overview

According to Gartner's 2019 Marketing Technology Survey, 64% of marketers surveyed have deployed or are deploying a personalization platform, with only 3% of respondents planning to abandon usage of their personalization platform.<sup>1</sup> These findings illustrate not only the continued growth in the installed base of personalization engines, but also the longevity of these investments.

Nevertheless, Gartner's 2020 CMO Spend Survey finds that only 14% of respondents rank personalization among the top capabilities most vital to the delivery of their marketing strategy over the next 18 months.<sup>2</sup> This finding suggests that marketers, while committed to their investments in

personalization tools, lack commitment to building the capabilities needed to use personalization tools to their full effect.

In response, personalization engine vendors are focusing on helping their clients achieve greater success. This includes:

- Helping digital marketing leaders make the business case for personalization
- Designing their platforms for ease of use by nondeveloper teams
- Enhancing training to increase adoption and utilization

Despite vendors' focus on client success, executive sponsors and project managers leading personalization efforts have the greatest influence over business outcomes. Gartner predicts that by 2025, 80% of marketers who have invested in personalization will abandon their efforts due, at least in part, to lack of ROI (see "Predicts 2020: Marketers, They're Just Not That Into You"). Platform providers are attempting to mitigate this risk through improved measurement and reporting capabilities.

Yet, digital marketing leaders remain fragmented in their use cases for personalization engines and their measures of personalization impact. According to the client reference survey for this research, more than half of personalization engine users identify digital commerce as their primary use case. This suggests users are focusing on near-term results; however, a look at top success metrics belies that assumption.

The top success metric client references use, regardless of use case, remains conversion. Client references focused on personalizing digital commerce also consider total revenue and average order value (AOV) among their top-three performance metrics, demonstrating the potential for personalization to yield financial outcomes. However, those focused on marketing and CX use cases prioritize campaign performance as one of their top-three success metrics. While improved campaign performance is a worthwhile endeavor — particularly if it leads to more effective targeting and audience engagement — digital marketing leaders commonly struggle to link engagement to revenue. That link is critical to sustaining investments in personalization.

The market for stand-alone personalization engines, as well as vendors' current and planned capabilities, are being influenced by three key trends.

### **Trend No. 1: Doubling Down on Digital Commerce**

Digital commerce continues its reign as the predominant personalization use case among client references surveyed in this research. Fifty-one percent of client references report leveraging their personalization engine primarily for digital commerce, while only 37% and 10% report using them to satisfy marketing and CX use cases, respectively. Most references report using their personalization engine to personalize website pages (e.g., home, category and product pages) and product recommendations — both of which are standard capabilities. Fewer are taking full advantage of other common personalization capabilities native to most vendors in this research, such as personalizing search results, navigation and offers.

Digital commerce remains a key focus for vendors, too, given its more direct connection to sales and ROI. Much of the recent and ongoing innovation from personalization vendors is in support of digital commerce objectives. Recent improvements in product recommendation capabilities reflect vendors' understanding of natural consumer behaviors; for example, they are providing image-based recommendations based on visual machine learning rather than on keywords (one black dress is not necessarily like another, for example). Vendors are also investing more in advanced merchandising capabilities. Vendors like Attraqt and Certona provide retail merchandisers the ability to boost and bury capabilities, while vendors such as RichRelevance and Monetate enable intelligent slotting to help users prioritize slotting where merchandise or content is placed most effectively. These improvements are all in service of helping marketers create better and more lucrative customer shopping experiences.

### **Trend No. 2: Vendors Continue to Prioritize Client Success**

Continuing the theme from last year's "Magic Quadrant for Personalization Engines," client success remains a top priority for personalization vendors. This year, vendors made new strides in helping clients identify account-specific behaviors, tactics and use cases to improve the impact of their investments in personalization engines. This includes tracking the use of more advanced platform features, tracking the desired depth of personalization and benchmarking use cases against industry standards.

This focus on client success is likely in response to organizations' overall low levels of personalization maturity. On average, client references surveyed in this research rated their organization's personalization maturity as "intermediate" (3.17 out of 5.00). At this stage of maturity, organizations typically struggle with integrating their personalization efforts. This indicates that most marketers are missing opportunities in using a broader set of customer data to improve personalization efforts. In addition, these same teams struggle to deliver consistent personalized experiences across channels and measure the overall results of their personalization initiatives. Client references focused on a CX use case in particular noted lower personalization maturity on average, categorizing themselves as "developing" (2.80 out of 5.00). This level of maturity often indicates that personalization occurs in only one channel — often web or email — based on observable data (see "What Multichannel Marketers Need From Customer Data Platforms").

To encourage and accelerate adoption of their platforms, vendors are building proprietary benchmarking tools to help clients seize opportunities and take specific actions to get more from their personalization capabilities. Multiple vendors, like Adobe, Emarsys and Evergage, are also providing marketers with a diverse set of training resources to help users navigate efforts across campaign planning, content creation, experience design and measurement. All of these capabilities are necessary to realize larger returns on personalization engine investments.

### **Trend No. 3: Accelerating Personalization Through Templates**

Most personalization engine vendors evaluated in this research come equipped with native data modeling templates and reporting templates. However, many are now beginning to offer templates that help marketing teams personalize content and experiences across channels and touchpoints,

too. These templates have the added effect of alleviating potential bottlenecks caused by having to rely on developers and designers to build out similar, custom templates.

For example, vendors like Insider, Dynamic Yield and Episerver offer libraries of content templates marketing teams can use to personalize engagements on channels like web, email, mobile applications and more. In some cases, they allow users to customize and save them for reuse later. Meanwhile, a handful of other vendors such as Emarsys, Boxever and Adobe have launched use-case or industry-specific personalization templates to help marketing teams galvanize their personalization efforts in more specific areas, such as business case documentation or workflow management.

Vendors will likely continue to expand their template libraries as marketing teams across maturity levels attempt to scale their personalization efforts through accelerated test setup and experimentation, content creation, and variation.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

“How Markets and Vendors Are Evaluated in Gartner Magic Quadrants”

“Critical Capabilities for Personalization Engines”

“Use a Personalization Engine to Deliver Consistent Digital Experiences”

“Crawl, Walk, Run: Define Your Vision, Strategy and Roadmap for Personalization”

“Making Personalization Pay: Building New Capabilities for Successful Marketing Communications Personalization”

“Tailored Help Personalization Showcase for Marketing Leaders”

“Key Consumer Trends for Website and Email Personalization”

## Evidence

<sup>1</sup> **Gartner’s 2019 Marketing Technology Survey:** Results presented are based on a Gartner study to understand how marketers are investing in, deploying and getting value out of technology. The primary research was conducted online from August 2019 through September 2019 among 418 respondents in United States (45%), Canada (7%), France (11%), Germany (12%) and the United Kingdom (25%). Eighty-three percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (56 respondents), high tech (30 respondents), manufacturing (102 respondents), consumer products (38 respondents), media (31 respondents), retail (47 respondents), healthcare providers (37 respondents), IT and business services (40 respondents), and travel (37 respondents). Respondents were required to have involvement in decisions pertaining to setting or influencing marketing technology strategy. The survey was developed collaboratively by a team of Gartner analysts who

follow marketing and was reviewed, tested and administered by Gartner's Research Data and Analytics team.

Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.

<sup>2</sup> **Gartner's 2020 CMO Spend Survey:** The purpose of this survey is to understand the marketing priorities and budget allocations of marketers to help clients benchmark, allocate spend and prioritize. The research was conducted online from March 2020 through May 2020 among 432 respondents in the United States (44%), Canada (8%), France (12%), Germany (11%) and the United Kingdom (25%). Respondents were required to have involvement in decisions pertaining to setting or influencing marketing strategy and planning, as well as have involvement in aligning marketing budget/resources. Eighty-four percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (55 respondents), high tech (49 respondents), manufacturing (68 respondents), consumer products (44 respondents), media (50 respondents), retail (55 respondents), healthcare providers (38 respondents), IT and business services (27 respondents), and travel and hospitality (46 respondents).

The survey was developed collaboratively by a team of Gartner analysts who follow marketing and was reviewed, tested and administered by Gartner's Research Data and Analytics team.

Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.

**Gartner Peer Insights reviews** for "Personalization Engines." We considered reviews for Gartner Peer Insights "Personalization Engines" posted from June 2019 to June 2020.

## Evaluation Criteria Definitions

### Ability to Execute

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

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

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

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

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

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

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

#### Completeness of Vision

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

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

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

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

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

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

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

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

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