

Magic Quadrant for Digital Marketing Hubs

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[VIEW SUMMARY](#)

CMOs and digital marketing leaders are under pressure to engage individuals on increasingly fragmented and unpredictable terms, driving the need for a common pool of profile data, analytics, workflow and content resources enabled by a digital marketing hub.

Market Definition/Description

Target Audience

This Magic Quadrant is intended for chief marketing officers (CMOs), chief marketing technologists and other digital marketing leaders involved in the selection of core systems to support digital marketing business requirements.

The Need for a New Category

The need for a digital marketing hub is motivated by three fundamental developments:

Consumer empowerment: Social and mobile technologies have given consumers power to research and interact with brands and take control of the conversation from brands and mainstream media.

Channel proliferation: Along with empowerment, consumers now have an abundance of devices and channels with which to interact with brands and purchase products and services, dramatically increasing the complexity of meeting customer expectations for a personal dialogue.

Marketing's responsibilities: As these challenges have grown, organizations have turned to marketing to take charge of the task of creating a single view of customers and enabling the organization to address them as individuals and deliver the right offer to the right person at the right time and place, as corporate strategy focuses increasingly on customer experience as the key to differentiation.

In sum, these developments drive a compelling need to address customers personally and consistently as individuals in a variety of contexts and formats. This, in turn, requires software that can unify disparate marketing data and processes to drive audience acquisition, engagement, conversion and transaction across fragmented and complex decision journeys.

Definition

Against this backdrop, Gartner defines "digital marketing hub" as follows:

A digital marketing hub provides marketers and applications with standardized access to audience profile data, content, workflow elements, messaging and common analytic functions for orchestrating and optimizing multichannel campaigns, conversations, experiences, and data collection across online and offline channels, both manually and programmatically.

It typically includes a bundle of native marketing applications and capabilities, but it is extensible through published services with which certified partners can integrate.

Broadly, the digital marketing hub addresses four key areas. These areas are the most crucial aspects of digital marketing to integrate in order to eliminate barriers to interacting consistently and personally with customers across channels:

Master audience profile — Combining first- and third-party data across known and anonymous domains for precision targeting of offers and experiences. A consistent view of customers (including anonymous ones) across marketing programs and processes is the baseline for effective communication.

Workflow and collaboration — To fuel marketing programs through ideation, planning and execution, as well as the creation, curation and cultivation of content, internally and with partners. Uniform collaboration and workflow are keys to breaking down silos that result in disjointed, incoherent customer experiences.

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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

Intelligent orchestration — To drive the sequencing and coordination of engagement across channels and to harmonize channel-specific marketing programs. Specialized channel-specific execution is sometimes prudent, but consumers are engaging on their own terms, freely switching among channels and devices. Thus, multichannel marketing programs need the intelligence to account for the full context of each interaction in real time.

Unified measurement and optimization — To trace a thread between investments and outcomes and to enable marketers to optimize investments to the highest yield. Unless marketing programs are measured by a common set of rules, marketers will squander resources and lose out to more-efficient competitors.

These four areas, in sum, represent areas in which marketers are advised to deploy solutions that cut across organizational and operational boundaries. These solutions must share common resources and data, making them natural candidates to source from a single vendor, even if other providers and partners contribute valuable specialized capabilities, both creative and technical. This extensibility is central to the hub concept. For more details, see the Inclusion and Exclusion Criteria section.

Magic Quadrant

Figure 1. Magic Quadrant for Digital Marketing Hubs



Source: Gartner (December 2014)

Vendor Strengths and Cautions

Adobe

Adobe is a Leader in this Magic Quadrant, with a strategic commitment to build out a marketing hub based on a number of acquisitions and a core service layer, including a master audience profile, integrated workflow and collaboration tools. Adobe's digital marketing hub consists of six products at various stages of integration: Adobe Analytics; Adobe Experience Manager (content management); Adobe Target (website and mobile app optimization); Adobe Social; Adobe Media Optimizer; and Adobe Campaign (formerly Neolane). Users are able to share segments, workflow, and unified measurement and optimization across the products for better orchestration. Adobe reports an average of 1.5 products per client, and the company is showing increasing strength in its core constituency of enterprise digital marketing departments. Adobe Marketing Cloud revenue for 2013 was estimated at \$1.2 billion.

Strengths

Strategic vision: Adobe continues to evolve a compelling vision of a digital marketing hub as a suite of complementary solutions fueled by a set of shared services, including a master audience profile and seamless workflow.

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.

Focus on the marketer: Building on its legacy in creative tools, such as Photoshop, Adobe is a marketing-first provider with a proven grasp of marketers' needs, stressing usability and collaboration, and adding features (such as anomaly detection) based on marketers' feedback.

Agency partnerships: Adobe has been aggressive during the past year in forging both platform and sales alliances with partners such as Publicis, SAP and Accenture. These partnerships provide a platform for growth and market insights.

Cautions

Integration: While Adobe has made significant strides toward integrating its disparate collection of acquired products, there are still inconsistencies among both visible and operational aspects of different solution sets, which will require continued development to overcome.

Organizational incentives: Some customers cited Adobe's product-centric sales organization as a driver of cost and an impediment to strategic outcomes.

Conversant

Conversant, a Niche Player in this Magic Quadrant, rebranded and repositioned itself in 2014 as an end-to-end strategic and creative partner for digital performance marketers. Formerly ValueClick, Conversant has moved beyond its roots as an affiliate advertising network and offers marketers a menu of managed services, from dynamic creative optimization to multichannel attribution, wrapped in a theme of "one-to-one personalization." The company executes advertising campaigns through an ad management system and its own mobile ad network, and it is a significant participant in programmatic marketplaces. Not a do-it-yourself software provider, Conversant offers a software-plus-service model focused on digital advertising. Conversant addresses the four major components of the hub model, but largely in the context of advertising. Total revenue in 2013 was \$573 million.

On 11 September 2014, Alliance Data announced its intention to acquire Conversant in a deal valued at \$2.3 billion in cash and stock. It plans to merge it into Alliance's Epsilon marketing service company. The deal is expected to close by the end of 2014, and its impact on Conversant's offering is unclear.

Strengths

Reach and scale: A prolific (although somewhat under-the-radar) digital media player, Conversant processes 1 trillion events and 1 billion clicks per month.

Dynamic creative optimization: Combining its own tag management system (TMS) and a market-leading dynamic creative technology, Conversant is able to deliver highly targeted display advertising.

Full-service features: Unlike most of the other hub providers, Conversant offers creative services, such as user experience (UX) and design, which can be useful for clients lacking in-house or agency resources.

Cautions

Advertising over multichannel marketing: Conversant was mentioned relatively infrequently by our survey respondents shopping for a hub, in part due to its emphasis on delivering ad campaigns rather than on offering a suite of marketing products and services.

Missing capabilities: Conversant lacks strong support for digital commerce, social and email channels, and its mobile offering is limited to advertising. UX personalization lacks API integration for optimization of a client's owned channels, such as its website.

DataXu

DataXu is a Niche Player in this Magic Quadrant. Positioning itself as a "big data marketing cloud" for consumer brands and agencies, DataXu focuses on automating workflow and collaboration and applying unified measurement and optimization to advertising and marketing programs to improve efficiency and response rates. A pioneering digital advertising demand-side platform (DSP) provider, DataXu continues to build out its big data processing, real-time decisioning and analytics hub to support nonadvertising use cases, such as website and mobile app content optimization, and integration of CRM and other data through alliances with Datalogix and LiveRamp. It provides a master audience profile, and through additional integrations with more than 35 digital ad exchanges, DataXu can identify and target users on display, mobile, video, social advertising and programmatic TV channels. Its 2013 revenue was an estimated \$120 million.

Strengths

Programmatic advertising: Claiming to have launched the first DSP capable of real-time bidding, DataXu remains at the forefront of programmatic advertising execution.

Predictive modeling: DataXu's advanced analytical models include "precommerce analytics," a method of predicting and targeting customers who are not yet — but likely will be — in market for a particular product. This supports the hub critical capabilities of customer data analysis and digital commerce.

Technical innovation: DataXu continues to innovate in the programmatic space, expanding support for mobile, video, social advertising and programmatic TV channels.

Cautions

Softer customer satisfaction: Reference client survey respondents gave DataXu relatively weak marks outside its core area of anonymous user tracking. Furthermore, some prospective clients

reported not shortlisting it due to a limited feature set.

Missing some critical capabilities: DataXu has limited API-only support for intelligent orchestration of certain functions such as social marketing, offline integration, email, mobile messaging and search engine marketing.

HP

HP is a Niche Player in this Magic Quadrant. HP unveiled a product called the "Digital Marketing Hub" in 2014, combining HP's big data HAVEn infrastructure with a new platform focused on measurement and optimization for discovering and targeting audience segments across channels. HP's Digital Marketing Hub features workflow and collaboration features (derived from Vertica) and automated real-time master audience profiling and segment discovery based on behavioral and contextual observations (derived from Autonomy). Despite a compelling, differentiated vision, HP has had difficulty gaining traction with marketers, as evidenced by reference survey respondents' reported lack of consideration in their selection processes. HP recently separated out its digital marketing efforts within HP Software to better focus on this opportunity.

Strengths

Advanced analytics: HP demonstrates powerful capabilities for turning vast amounts of customer data and audience signals into new target segments.

Global scale: HP brings the resources and support of a large global company.

Supporting capabilities: HP has demonstrated abilities to integrate with third parties (such as Salesforce), but it also supports its Digital Marketing Hub with its own suite of related products, such as TeamSite, MediaBin, Aurasma, Qfiniti, Explore and Optimost.

Cautions

Technical orientation: HP projects a highly technical message that appeals more to IT than marketing.

Narrow focus: Product gaps in intelligent orchestration functions such as email, mobile, social and programmatic media, while available through partnerships, may dissuade some marketers looking for a more complete out-of-the-box solution.

IBM

IBM, a Challenger in this Magic Quadrant, identifies its ExperienceOne offering as a digital marketing hub in the form of what it calls an "integrated portfolio" of applications. IBM identifies 10 solution areas, each with multiple products, under the ExperienceOne banner. ExperienceOne focuses on applying customer analytics and journey maps to support collaboration and workflow, allowing marketers to visualize, measure and optimize customer behavior and orchestrate experiences and campaigns. It integrates master audience profile data across channels to forge a single identity, accessible through a central marketing database, and addressed through an interaction engine that automates personalized interactions to advance customers down a specified conversion path. Although IBM articulates a strong vision for the future of marketing software and services, our survey suggests its current offerings trail the Leaders in customer satisfaction. IBM does not break out revenue by product line.

Strengths

Vision and market understanding: IBM was among the first major software vendors to recognize the potential of software to revolutionize marketing and articulate a vision for meeting this demand, based on extensive research with marketing leaders.

Quality of acquisitions: IBM has acquired a number of top-rated digital marketing providers, such as Unica, Coremetrics, Silverpop and Xtify, which it continues to integrate into its hub.

Global presence and vertical support: The breadth and scope of IBM's marketing service businesses give it a strong knowledge base for helping organizations achieve strategic outcomes.

Cautions

Holes in marketing features: Survey respondents who did not select IBM cited lack of key features or capabilities as the No. 1 concern. Some respondents noted IBM lacks strong solutions for advertising, and some expressed concern that IBM has not kept pace with competitors in digital marketing analytics.

Integration, cost and complexity: Respondents also expressed concern about lack of built-in integration among complex products, as well as perceived high costs associated with deployment and maintenance.

IgnitionOne

IgnitionOne, a Visionary in this Magic Quadrant, describes its digital marketing hub as being centered on what it calls "true data management" at the intersection of marketing database, unified measurement and optimization, channel orchestration, and campaign management workflow and collaboration. Combining IgnitionOne's roots in search engine marketing with its recent acquisition of data management platform (DMP) provider Knotice, IgnitionOne excels in its ability to combine data about anonymous and known customers from across channels into a common master audience profile. Its platform integrates with traditional CRM solutions, such as from Salesforce, and campaign management tools for intelligent orchestration, such as IBM Campaign (formerly Unica Campaign), as well as third-party sources and programmatic media buying platforms whose strategies it can optimize algorithmically. IgnitionOne's total 2013 revenue was \$91.9 million.

Strengths

Customer satisfaction: IgnitionOne turned in the strongest set of customer references among this report's competitors. Customers cited its ability to develop deep understanding of vertical, segment and business needs, as well as address these needs with its technology.

Open integration and support: Leading-edge product architecture and expert support give the IgnitionOne platform flexibility to meet highly specific marketing objectives, such as refining and activating customer segmentation, and addressing critical stages of marketing funnel performance.

Results-driven vision: IgnitionOne focuses on optimizing the use and usefulness of data and scoring methods to drive multichannel marketing programs. This approach typically yields quantifiable campaign results, along with analytical insights.

Cautions

Maturity: Although IgnitionOne has made rapid strides in integrating data from its legacy search and DMP components, its overall platform is still at an early stage of development relative to its vision, and its organization, as yet, lacks the scale and scope of the Leaders.

Ad tech legacy: IgnitionOne's foundation is more focused on the ad tech side of marketing than on the customer journey, which it leaves to integrated partners that may have overlapping intentions to act as hubs for customer data. Its platform lacks depth in social marketing and digital commerce.

Infor

Infor is a Niche Player in this Magic Quadrant. Infor's Marketing Management suite provides a collaboration and workflow management workspace that enables marketers and their suppliers to coordinate and automate efforts. Although it has embraced a vision of multichannel "always on" marketing and its solutions support a wide range of digital channels, its marketing approach is notably more traditional than other aspiring digital marketing hub providers. Its toolset includes an interaction advisor and customer engagement hub for unified measurement and optimization of interactions, and a real-time multichannel decisioning engine that delivers intelligent orchestration of messages, but its principal focus is on scripted customer interactions, rather than on digital tactics like search marketing, programmatic retargeting or content marketing operations. It claims 3,261 new customers in the past year and 73,000 customers around the world, yet it lacks strong brand recognition among our panel of digital marketers. Its total revenue in 2013 was \$2.1 billion.

Strengths

Scale and momentum: Infor's global footprint gives it a surprisingly large customer base over a diverse set of products. With more than 3,000 product specialists in 194 countries offering support and training in 20 languages, it offers a truly global perspective, especially among midsize marketers.

Marketing roots: Based on direct experience, Infor is well-qualified to support the transition from conventional marketing operations to digital multichannel approaches.

Real-time analytics: Infor's framework for real-time multichannel decisioning stands out as a promising foundation on which to build data-driven marketing programs. Segmentation can be fixed or dynamic, and created by manual filtering or via advanced measurement and optimization capabilities.

Cautions

Missing digital components: Infor lacks support for intelligent orchestration capabilities, such as programmatic media and search engine marketing, and it relies on custom integration for tag management. Its approach to content supply chain and social engagement are more focused on collecting data for email targeting than on cultivating native presence.

Legacy factors: With hundreds of consolidated and re-engineered products collected from more than 35 acquisitions, Infor has a complex portfolio with many vestigial elements. Despite its large customer base, it ranked low in product consideration among survey respondents.

Marketo

Marketo is a Challenger in this Magic Quadrant. Marketo is a well-known leader in B2B marketing automation. Marketo has recently expanded its focus to business-to-consumer (B2C) marketers and has expressed digital marketing hub ambitions with its open platform strategy, centered on its master audience profile. However, it scores in the middle of the pack in terms of most digital marketing hub use cases. Marketo scores near the top in collaboration and workflow management and intelligent orchestration capabilities, particularly email and mobile marketing. With \$95.9 million in 2013 revenue, it is among the largest independent, fully marketing-focused software providers, having avoided the acquisition wave that absorbed many of its closest competitors.

Strengths

Customer satisfaction: Marketo has strong momentum, particularly with B2B marketers in the lower end of the enterprise market; Marketo scored near the top of the field in overall customer satisfaction, in large part for its ease of use and relative fast time to value.

Intelligent orchestration: Marketo scored near the top of the pack for email and mobile marketing capabilities, which are mature aspects of its multichannel automation capabilities.

Partners and app exchange: Marketo benefits from a strong partner ecosystem and a growing

app exchange.

Cautions

Performance limitations: Some survey respondents expressed concerns about scalability and extensibility in more-complex enterprise environments.

Third-party dependencies: Marketo's open platform and partnership strategy is a benefit, but it lacks strong native support for some unified measurement and optimization capabilities, including predictive modeling and tag management. Although all marketing touchpoints are tracked, captured and stored, third parties are required for advanced analytics.

MediaMath

MediaMath, a Niche Player in this Magic Quadrant, is a well-known pioneer and leader in programmatic media, but it is less familiar in general marketing circles. Its focus on algorithmic optimization appeals to science-oriented marketers. It describes its TerminalOne platform as a "Marketing Operating System," reflecting the aspirations of many programmatic ad tech providers to migrate from media into the center of the marketing suite through broader application of unified measurement and optimization. Although the MediaMath "Brain" algorithm is a formidable example of a learning machine, MediaMath is relatively early in its journey toward broader realization of a vision that unites marketing activities beyond advertising, such as content marketing, digital commerce and customer journey design, around a common hub of customer data and analytic insights. MediaMath had total revenue of \$311 million in 2013.

Strengths

Advertising scale: MediaMath is among the leaders in processing high volumes of ad impressions, and it can bridge user identities across devices and channels in real time to form a unified audience profile.

Manageability: MediaMath has strong support for workflow and collaboration within the advertising domain, and it provides seamless integration with numerous partners in its certification program.

Advanced algorithms: MediaMath's machine learning uses goal-oriented feedback to optimize outcomes, delivering results that are measurably superior to basic rule-based systems.

Cautions

Narrow focus: MediaMath is currently optimized for advertising; the applicability of TerminalOne as a hub integrating marketing tools to intelligent orchestration outside the media domain, such as digital commerce or search engine marketing, remains somewhat unproven.

Growth pressure: MediaMath has raised more than \$175 million in funding and boasted triple-digit year-over-year growth in 2013, which means it risks straining its service model as a result of rapid overseas expansion.

Neustar

Neustar is a Visionary in this Magic Quadrant. Its PlatformOne offering focuses on building master audience profiles by identifying individuals across channels and devices. It will appeal to marketers seeking a personalized and measurable approach to targeted communication along chaotic decision paths. Neustar's unique roots as a congressional-mandated neutral manager of phone number portability and related telecom identity services in the U.S. shape its digital marketing hub around complete, authoritative real-time data about consumer identity. PlatformOne divides functions into customer intelligence, media intelligence and activation/targeting that supports intelligent orchestration of multichannel dialogues. It has been active in acquisitions and partnerships, and it specializes in marketing solutions for communications service providers, media and advertising, financial services, retail, Internet, and technology companies. Its brand and credibility got a boost from a prominent partnership with Facebook and Omnicom based on Facebook's "People-Based Marketing" initiative.

Strengths

Connecting identity with an eye on privacy: Neustar's strong focus on identity, security and privacy, derived from its legacy telecom orientation, attracts both companies and partners concerned about the liabilities of uncontrolled tracking.

Unified measurement and optimization: Neustar's real-time decision support, combined with predictive modeling, can produce strong results for customers.

Partnerships: Neustar has a healthy collection of integration partners.

Cautions

Organization: Neustar's corporate dependency on unrelated telecom business with contract volatility creates organizational stress.

Completeness of solution: Neustar maintains a relatively narrow focus on workflow and collaboration for data and media rather than on content and experience design aspects of marketing.

Oracle

Oracle is a Leader in this Magic Quadrant. Oracle's highly acquisitive strategy, which includes Eloqua, Responsys, BlueKai and Compendium, appears to be paying dividends. Oracle scores near the top in all

digital marketing hub capabilities across the spectrum of workflow and collaboration, master audience profile, intelligent orchestration, and unified measurement and optimization. Contrary to the belief that an acquisition-heavy strategy yields a fragmented product portfolio, Oracle scored above-average in service integration across its offerings. Its acquisition of BlueKai, a leader in DMPs, and subsequent reorientation of its capabilities into a central "data as a service" element reveal an insightful strategy for uniting its wide-ranging offerings around a data-oriented hub.

Strengths

Depth and breadth of solutions: Oracle has among the broadest and deepest range of native digital marketing hub capabilities.

Versatility: Oracle offers nearly equivalent depth for both B2B and B2C marketers, although the solutions are partitioned.

Intelligent orchestration: Oracle's DMP and content marketing capabilities are an advantage among peers.

Cautions

New market: Oracle is skilled at serving the CIO, but unproven at serving the CMO and the CMO's team.

Integration legacy: Oracle has a history of limited integration and innovation and areas of significant overlap in acquired products. While there are indications it is moving more deliberately to integrate products, Oracle will need to do a better job communicating how these products will come together over time.

Rocket Fuel ([x+1])

Rocket Fuel ([x+1]) is a Visionary in this Magic Quadrant. Originally evaluated as [x+1], after [x+1] was acquired by Rocket Fuel in September 2014, its brand was merged into Rocket Fuel. This evaluation was completed before the acquisition and applies only to [x+1].

[x+1] provides a central hub that gives marketers a way to combine their own data with third-party data in order to develop audience profiles, segments and marketing plans that can be executed via advertising networks and clients' own channels. [x+1]'s Origin Platform is supported by its Predictive Optimization Engine (POE), which not only extends users' own and third-party segments with look-alike models, but also provides intelligent orchestration, including creative messaging and personalization recommendations across channels, such as websites, mobile sites, email and call centers. POE also drives [x+1]'s demand-side platform for display and video advertising campaigns. [x+1] features real-time user-level profile updates that can trigger cross-channel messaging (for example, incorporating a discount promised for "liking" a Facebook ad immediately onto a website landing page). [x+1]'s gross revenue for 2013 was \$72 million.

Strengths

Master audience profile: [x+1]'s data hub is structured around a singular customer profile, which is available across its products and is updated in real time as attributes change. Likewise, its "keychain" capability links anonymized external and offline data to this profile.

Data management and integration: As an early DMP provider, [x+1] provides access to a wide range of data providers, and it receives high customer marks for workflow and collaboration integration.

Intelligent orchestration: [x+1] provides the ability to personalize websites and landing pages through integrations with content management or optimization tools, and it can push signals to many channels, including SMS providers and call centers.

Cautions

Limited support for digital commerce: While it provides API support for platforms such as Demandware, [x+1] is ranked lower than many providers in this Magic Quadrant in its support for digital storefront and embedded commerce.

Social support limited to advertising: [x+1]'s social and content marketing support is generally limited to the execution of advertising campaigns using programmatic markets and more targeted methods, such as Twitter's "tailored audiences."

Salesforce

Salesforce is a Leader in the digital marketing hub space. Salesforce continues to advance its vision and product strategy around the digital marketing hub, with its Journey Builder product playing an increasingly prominent role as a key control point in its product line. By virtue of its strength in master audience profile management, Salesforce has an advantage in realizing the vision of a digital marketing hub. Although its marketing strength is primarily in intelligent orchestration of email marketing and lead management, its hub strategy remains somewhat aspirational in areas of unified measurement and optimization and intelligent orchestration of content and media. Salesforce revenue was \$4.07 billion in 2013.

Strengths

Base functionality and momentum: Salesforce's acquisition of ExactTarget, together with its market leadership in overall CRM, gives its digital marketing offering credibility and momentum.

Market vision: Salesforce shows strong vision, operational leadership and thought leadership in

the digital marketing space.

Workflow and collaboration: Salesforce's tools provide an intuitive UX and ongoing product innovation.

Cautions

Legacy focus: Salesforce's push messaging orientation is a vestige of ExactTarget's email marketing heritage. Its advertising scope is limited to social channels, and it relies on custom integration for functions such as search engine marketing, digital commerce and multichannel attribution.

Customization and data integration: Some customers complain that Salesforce's UX customization and data integration are cumbersome.

Sitecore

Sitecore, a Visionary in this Magic Quadrant, has clear ambitions to break out of the content management box, which it has validated with its expanded focus on collaboration and workflow, intelligent multichannel orchestration, and its recent repositioning around experience management. This expanded strategy is a decisive step in the direction of the digital marketing hub, and it scored at or slightly above average on most digital marketing hub capabilities. Sitecore has notable strength in the intelligent orchestration of content and UX, as well as digital commerce. Sitecore did not report its revenue.

Strengths

Content edge: Sitecore delivers market-leading content management and content marketing capabilities.

Personalization: Sitecore provides intelligent orchestration of targeted website experiences, based on master audience profiles.

Reach and momentum: Sitecore has demonstrated market momentum and geographic reach.

Cautions

Limited range: Content management remains Sitecore's "center of gravity," making Sitecore somewhat narrow relative to its field of competitors.

Transitional pressures: Sitecore is innovating and growing rapidly, which could mean growing pains that put pressure on existing customers and service levels.

Teradata

Teradata is a Niche Player in this Magic Quadrant. A global analytics and application provider with \$2.7 billion in revenue in 2013, Teradata continues to expand its offering to marketers with its Integrated Marketing Cloud. It offers solutions for marketing operations, campaign management, digital messaging, marketing analytics and customer data management. The Customer Interaction Manager provides a central workbench, or "whiteboard," for workflow and collaboration, allowing marketers to define audience segments and business rules, which can be enhanced by Teradata's predictive algorithms for intelligent orchestration of email, mobile messaging (via a partner), offer optimization (via APIs), and some social channel support (in beta). Teradata's revenue from marketing applications in 2013 was an estimated \$250 million.

Strengths

Multichannel campaign management: Teradata's campaign management solution, which is the core of its hub, regularly appears on prospective clients' shortlists of leaders in the campaign management category.

Offline data integration: Data from external sources, including point-of-sale retail systems and CRM platforms, is enabled via APIs and a strong alliance with LiveRamp, which supports 80 common data sources.

Data governance and marketing data management: Building on its enterprise data management expertise, Teradata provides a customer data management framework built on its master data management schema, including data quality and deduplication features.

Cautions

Integrations in progress: Reference survey respondents who considered Teradata but did not select it most often cited a lack of both features and complete solution integration. For example, digital assets, dashboards, and embedded and predictive analytics are not available for all channels.

Limited support for intelligent orchestration: Teradata's support for digital advertising, search marketing and commerce is limited, although it does offer integration support for external data management platforms.

Turn

Turn, a Visionary in this Magic Quadrant, offers an integrated data management, programmatic buying and analytics hub that is used by many global brands and major advertising agencies. Although primarily a tool for intelligent orchestration of digital advertising, Turn supports many hub critical capabilities and use cases via prebuilt integrations with dozens of partners — from data sources to website personalization, search engine marketing and email providers. Turn's modules include Audience

Suite, Campaign Suite and DataMine Analytics. Audience Suite can ingest and anonymize master audience profiles based on first-party client data, segment and enrich them with information from data partners such as Nielsen and eXelate, and extend them via look-alike models. Campaign Suite is its demand-side platform. DataMine Analytics is a report suite and structured data store that supports unified measurement and optimization. Turn offers audience identification across devices and channels (including mobile, social, display and video), as well as an integrated workflow and collaboration suite for digital media research, planning and syndication. Turn's revenue for 2013 was an estimated \$90 million.

Strengths

Self-serve media planning tools: Turn has succeeded in bringing powerful media planning and buying tools, including profile building and syndication, to users outside traditional media agencies.

Third-party integrations: A prolific integration partner with a transparent data model and open APIs, Turn supports orchestration capabilities through access to all major data providers, data onboarding partners (such as Datalogix), and performance partners (such as Kenshoo and Rentrak).

Measurement and optimization: Turn's forecasting models are expansive, incorporating a full set of impression attributes that increase accuracy, rather than relying on the commonly used limited sample set.

Cautions

Less adept outside programmatic media: Reference clients indicated lower satisfaction with Turn's support for its nonprogrammatic features, such as social marketing, email and search.

Uneven sales and support and ease-of-use challenges: Turn was also rated lower for its sales process, perhaps as a result of fast growth, with some users reporting a lack of follow-through on support requests. This situation is likely exacerbated by Turn's design, which leans toward expert users rather than novice users.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope 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

This is a new Magic Quadrant.

Dropped

This is a new Magic Quadrant.

Vendors to Watch

Several vendors demonstrated many of the qualities we associate with digital marketing hubs, but they didn't meet all of the inclusion criteria we established (see the Inclusion and Exclusion Criteria section, below). However, given the volatility of the marketplace, they are worth watching as the market evolves.

Acxiom

Announced in 2013, Acxiom's Audience Operating System (AOS) aspires to provide neutral data infrastructure and secure profile connectivity to the ecosystem of digital marketing hubs by partnering with the hubs rather than becoming a hub itself. Acxiom's experience handling personally identifiable data on behalf of direct marketing clients — resulting in its proprietary Abilitec identification technology — lends credibility to its AOS ambitions, and partnerships with hub providers MediaMath and Marketo suggest some early traction, but the jury is still out on whether Acxiom can enlist a critical mass of hub providers as partners in its AOS venture.

Cake

Founded in 2010, Cake is emerging into the digital marketing hub space from its roots as a "white label" analytics and execution platform provider for digital marketing affiliate networks. Its goal is to provide data integration, analytics and optimization, as well as enable execution of cross-channel marketing programs across display, mobile, retail, lead generation and affiliates. The company appeals to enterprise performance marketers that desire strong accountability and publishers offering a pay-for-performance pricing model. Preferring to build instead of buy, Cake provides a native ad server, open APIs, a CRM data onboarding capability, and an attribution model. In line with its affiliate roots, Cake emphasizes the tracking of media spending directly to sales.

eBay Enterprise

In 2014, eBay Enterprise announced its Commerce Marketing Platform, a new offering with digital marketing hub attributes. With this new platform, eBay Enterprise has clear ambitions to establish leadership in the commerce-focused segment of the digital marketing ecosystem. By combining the

capabilities from GSI Commerce, which eBay Inc. acquired in 2011, with an alliance with FICO for advanced analytics and eBay Inc.'s commerce expertise, this offering has the potential to resonate with commerce-driven companies. As the Commerce Marketing Platform relates to digital marketing hubs, eBay Enterprise's bet is that commerce-driven companies, in particular, will prefer purpose-built to general purpose.

HubSpot

As a pioneer in the design of an all-in-one digital marketing offering, HubSpot deserves honorable mention as a digital marketing hub provider to watch. Its primary focus is on small or midsize businesses; however, its successful initial public offering in the fourth quarter of 2014 and its strong momentum in the market should put it on the radar of enterprise marketers — if not as a shortlist digital marketing hub candidate, than as an innovative vendor that understands how, as it relates to digital marketing hubs, the integrated whole often yields something greater than the sum of its parts. Whether HubSpot will take decisive steps to move upmarket remains to be seen.

Kenshoo

A pioneering paid search bid optimization platform provider, Kenshoo has expanded its purview to include local and social advertising and, more recently, predictive analytics and multichannel attribution for marketers. It takes a portfolio-based approach to improving return on marketing investment, and its September 2014 acquisition of mobile app and in-game advertising platform provider Adquant, as well as its new reporting and analytics capabilities, further expand its scope. Innovative offerings such as Demand-Driven Campaigns, which uses insights from search activity to build dynamic ads targeted at similar audiences on Facebook, indicate a strong commitment to performance marketing. Kenshoo will need to continue to build out its support for channels and capabilities beyond search and social advertising to compete as a digital marketing hub provider.

Marin Software

Marin Software's origins are in search and social bid management and pay per click (PPC) advertising, but it has recently expanded its multichannel push with its third quarter of 2014 acquisition of retargeting vendor Perfect Audience and its repositioning around what it describes as "audience marketing." Building on its strong roots — providing capabilities to performance marketers with a focus on search and social channels — Marin will need to integrate its display targeting capabilities and expand its capabilities and vision beyond advertising to make a credible play as a digital marketing hub provider.

RedPoint

The RedPoint Convergent Marketing Platform, an emerging digital marketing hub, aligns closely with the product vision presented in this report. With roots in marketing automation, RedPoint has taken a deeply data-driven architectural approach to multichannel campaign management, while maintaining the flexibility to integrate with any relational or nonrelational data source and a wide variety of channel-focused marketing tools. RedPoint is an active innovator in big data, with a focus on data quality and master data management. It has a clear and practical vision of how to apply data to optimize customer engagement, and how to present complex capabilities in an intuitive user interface. With a growing international presence, we expect RedPoint's marketing hub solution to gain more prominence in the marketplace.

SAP

SAP has taken a largely ecosystem-based approach to the digital marketing hub. SAP extends its business systems of record with SAP Hana for real-time analytics to drive targeted engagement with customers on the decision journey and with Hybris for digital commerce, to turn engagement into transactions. To fill conspicuous gaps in the broader digital marketing fabric, SAP resells the Adobe Marketing Cloud and partners closely with Accenture for delivery. While this ecosystem-centric approach may be a departure from other vendors participating in this market, its goal remains similarly focused on delivering a converged enterprise OS for digital marketing.

SAS

Business intelligence standout SAS is one to watch for its digital marketing hub potential at the intersection of its advanced analytics, multichannel campaign management and marketing resource management capabilities. While SAS still needs to integrate, simplify, package and market these capabilities to compete effectively and win over the average marketer against more mature digital marketing hub offerings, its strength in advanced analytics, marketing resource management and long-standing relationships with enterprise marketing organizations make it one to watch.

Tealium

Building on its strength as a leading TMS provider, Tealium is positioning itself as a neutral data layer that can function as essential "middleware" in a vendor-agnostic marketing cloud. It touts its open architecture and prebuilt integrations with hundreds of commonly used marketing applications, including analytics and automation solutions, as well as its real-time event processing engine (called AudienceStream). Tealium's strategic goal is to organize and enrich the data layer that lies between applications and the customer experience. In this way, it aims to provide a set of core services essential to the hub — namely, data collection, normalization and a master audience profile.

Webtrends

Founded in 1993 and a pioneer in the Web analytics space, Webtrends is expanding its offering in Web and mobile analytics beyond its traditional competitive set (that is, Google Analytics and Adobe

Analytics) through an emphasis on open APIs, real-time event processing, content personalization and advanced analytics. In addition to its enterprise Web and mobile app analytics solution, Webtrends offers a content testing and targeting tool, ad hoc data exploration and mining for the power user, and a complex-event processing layer that allows for contextual, trigger-based messages. It has built-in integrations with marketing automation systems, such as Salesforce Marketing Cloud and IBM Silverpop, and it is adding a wider portfolio of activation partners, such as content management and social marketing systems.

Inclusion and Exclusion Criteria

Providers needed to meet the following criteria to be included in this Magic Quadrant:

Critical Capabilities

Providers needed to support a set of critical capabilities developed to support the four key areas described in the Definition section above. While we neither required nor expected participants to offer native applications covering all capabilities, we did require evidence that capabilities are substantially supported either natively or through an active first- or third-party integration that was operational at the time of our evaluation. The capabilities are as follows:

Master audience profile

Customer data analysis and modeling — The consolidation of user profiles to support discovery and identification of audience segments.

Anonymous user tracking — The ability to create and manage a unique identifier and profile for tracking and responding to audience behavior across channels.

Third-party data matching — Enriching first-party audience profiles with third-party data to enhance personalization and targeting efforts. Marketers often must enrich the data they have with data from external sources as they seek to better understand, segment and communicate with audiences.

Workflow and collaboration

Entity and workflow management — Create, retrieve, update, and delete users, data and content sources, workflow, and custom configurations. To allow collaboration and nimble campaign design, marketing managers must be able to quickly and easily form teams of internal and external personnel, grant them secure access to resources, and establish workflow procedures without technical bottlenecks.

Data collection and cleansing — Ability to source and manage distributed data, to enrich customer profiles, personalize experiences across devices and improve tactics. The value of data-driven marketing programs is only as good as the quality of the data that feeds them, so marketers need assurances that these programs have access to data that is relevant and reliable.

Content supply chain — Creation, curation and cultivation of content assets to fuel audience engagement efforts.

Services integration — Assimilating services into a common structure that shares data and resources, access and user interface conventions for streamlined workflow and ease of adoption.

Intelligent orchestration

Social media marketing — Social listening and publishing for engagement with communities.

User experience (UX) personalization — Using first- and third-party data to deliver personalized experiences on websites and apps to improve engagement and conversion.

Programmatic media — Automation of bidding and trafficking of advertising in real-time markets. Marketers spend a significant share of their budgets on advertising, and they must ensure that these investments are getting their messages in front of the right people at the right time, in the right context, as economically as possible. Programmatic media can improve targeting and ROI.

Email and mobile messaging and offers — Push messaging campaigns for email and mobile channels.

Digital commerce — Shopping experience with presentation and execution of commercial transactions across Web and mobile channels, including integration with offline experiences.

Search engine marketing — Manage search engine optimization and paid search advertising. It also includes search retargeting, which incorporates recent search activity into targeting of ads and landing pages.

Integration with offline channels — Sharing user profile, behavior and sales data, and triggering coordinated actions, such as product offers between online and offline channels. This means incorporating data from offline sales and other nondigital interactions, and applying digital insights and actions to offline situations where feasible (for example, by coordinating direct mail or outbound telemarketing activities with digital marketing operations).

Unified measurement and optimization

Multichannel attribution and predictive modeling — Collection and analysis of data for assigning credit to marketing touchpoints along the purchase path, and use of statistical techniques to assess expected outcomes of marketing activities.

Revenue

Providers in this evaluation must have had global revenue of at least \$50 million in 2013.

Integration and Extensibility

Providers must provide published APIs that support customer and third-party integration with shared services. We looked for consistency regarding single sign-on, interface behaviors and compatibility with standards, where applicable.

Global Reach and Staffing

Providers in this evaluation needed to have a global reach, in which they have helped customers launch solutions in at least two global regions.

New Customers

Providers in this evaluation must have acquired at least five new customers in 2013 (including new engagements within a different business unit of an existing client). Client acquisition costs in this sector are high, and the ability to grow business in an existing account is a bellwether of success.

Evaluation Criteria

Ability to Execute

We elected to weigh Ability to Execute criteria equally, given the relative nascence of the category and consequent lack of evidence for any preferential factors.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (December 2014)

Completeness of Vision

As with Ability to Execute, we elected to weigh Completeness of Vision criteria equally.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (December 2014)

Quadrant Descriptions

Leaders

The Leaders quadrant is currently occupied by Adobe, Oracle and Salesforce — three large software vendors that have both the vision to invest in digital marketing applications ahead of an explosion in

market demand and the executional capacity to assemble and deliver enterprise-class solutions in a short time frame, predominantly through strategic acquisitions. Collectively, they still resemble collections of disparate applications more closely than true hubs, but they share a vision and story of eventual integration and openness. Their cloud solutions are among the costliest and most complex to integrate, which creates opportunities for more focused competitors that can't yet match their breadth of scope.

Challengers

IBM and Marketo share the Challengers quadrant. Both have articulated far-reaching visions, but they have not yet matched the Leaders in deploying visionary solutions, and in particular, they lack a strong response to the growing phenomenon of programmatic media and its real-time multichannel data management implications. The Challengers both enjoy a loyal customer base and are moving quickly to close gaps in a rapidly evolving nascent market.

Visionaries

The Visionaries quadrant is occupied by companies that have parlayed success in areas adjacent to the digital marketing hub to seize the new opportunities that hub orientation represents. Four of them — Rocket Fuel ([x+1]), IgnitionOne, Turn and Neustar — have approached from the programmatic ad tech direction, while the fifth, Sitecore, comes from the content management space. While the Visionaries are generally much smaller and, in most cases, younger than the Leaders and Challengers, they boast high customer satisfaction, a laser focus on measurable value, and the talent and resources of entrepreneurs and early-stage investors. In this volatile market, any could breach the Leaders quadrant within a year.

Niche Players

The six providers in the Niche Players quadrant come from a variety of backgrounds, and many are leaders in their respective areas. These players face a common challenge of migrating their offerings and their brand images toward a broader scope in a volatile marketplace. Even since our evaluation, a large number of acquisitions has taken place, expanding the scope of several of these providers. The good news for many is that we don't see the digital marketing hub space as a winner-take-all competition, unlike certain predecessor categories, such as ERP. Marketing hub buyers value openness and seek integration with best-of-breed solutions, which leaves room for Niche Players. But it's still early in the competition, so, as with the Visionaries, any of these providers could change quadrants in a relatively short time frame.

Context

The past several years have brought a dramatic acceleration in the application of technology and real-time data to marketing. As marketing technology budgets increase (see "Digital Marketing Budgets Increase, Reflecting Focus on Customer Experience"), leading marketing service and software providers are investing heavily in assembling collections of marketing applications and services — mostly through acquisitions but also through organic development. Naming conventions for these new areas are often confusing and misleading (for example, "marketing cloud" and "marketing hub"). The acquisitions have rewarded investors and entrepreneurs that continue to feed the growing demand for innovation in digital marketing.

The Need for a Holistic Approach

The pace of these developments and acquisitions, combined with the diversity of the application and marketing approaches they reflect, creates acute integration challenges for marketers. A marketer's tendency to embrace point solutions and agencies in the name of expedience is giving way to a conviction that finding, winning and keeping the best customers requires a holistic approach to profiling and communication. This strategy requires marketing processes and data to work together in an orchestrated way across paid, earned and owned channels. This is accomplished by acquiring an integrated digital marketing hub; integrating a variety of applications and components to create a hub; or by working with digital marketing agencies and other service providers that deliver these capabilities as a hosted managed service.

Category Volatility

This report reflects information collected in the second and third quarters of 2014. Since that time, many of the vendors we reviewed have either enhanced their offerings through acquisitions or have been acquired themselves. Marketers should consider this snapshot a baseline, but also weigh late-breaking developments as they research new solutions. Marketers should also expect some significant shifts in the positions of vendors during the coming years. There is still time for providers to migrate across quadrants before market positions start to stabilize. Therefore, marketers should carefully consider the openness and adaptability of solutions as they move to adopt new hub solutions.

Market Overview

The market for digital marketing hubs is still nascent and is characterized by customer confusion (sometimes bordering on frustration). It features a fragmented and heterogeneous collection of competitors from different backgrounds that approach the problem and its solution in different ways, only adding to the confusion. The past two years have seen a great deal of consolidation, with the largest software vendors spending heavily to acquire some very young companies at high valuations. This road has been traveled before and is characteristic of many fast-growing markets. Digital marketing investments are among the highest priority for CEOs (see "Digital Marketing Takes Top Billing

in CEO Survey" and "Presentation of Key Findings From Digital Marketing Spending Survey, 2014"). At the same time, we've seen a proliferation of aggressive new startups driven by the conviction that science and technology can deliver better marketing results and create new fortunes.

We segment the competitive landscape into three broad categories: diversified software providers, programmatic ad tech providers, and analytics and marketing operations providers.

Diversified Software Providers

These include Adobe, HP, IBM, Infor, Oracle, Salesforce and Teradata, all of which have used acquisition strategies to accelerate their entry into the market. These companies are shaped by their experiences with historical IT revolutions — from PCs and desktop publishing to ERP and cloud services — so they've learned the importance of speed to market in fast-growing markets. Historical audiences for the majority of these vendors are IT organizations, with marketing being a relatively new constituent. Their size, ability to acquire and potential for broad market reach puts them in an attractive position. While these vendors generally claim and often deliver integration with other environments, they are often designed to work best with native capabilities, and integration can be difficult for less-technical marketers.

Programmatic Ad Tech Providers

These include Conversant, DataXu, IgnitionOne, MediaMath, Neustar, Rocket Fuel ([x+1]) and Turn, which have collectively focused on the problem of how to best target and deliver digital ads in real time. These vendors have a long history of serving the needs of marketers and agencies as their primary constituent, but their historical focus has been relatively narrow. Many now aspire to apply these skills to the bigger problem of how to effectively use data to optimize all digital marketing operations in real time across channels and devices. Their experience with intelligent algorithms and very high volumes of data and transactions qualifies them to assume a more strategic role at the core of digital marketing operations.

Analytics and Marketing Operations Providers

These include Marketo, Sitecore, Webtrends and many others. These vendors have also focused on the needs of the marketer, but they have taken a broader, more operational view than ad tech vendors. Driven in part by shifts in market demand, these companies have been able to leverage their roles as strategic partners to their marketing clients to assess new needs and extend their offerings toward broader scope. Their integration with key client systems and visibility into long-range marketing results give them a privileged position from which to sell.

In this category, we also find TMS providers, such as Ensign and Tealium, which appear poised to make a bid for hub positioning, although their efforts were deemed too premature to be evaluated in this report. Many other analytics-oriented contenders have seen slower growth than their ad tech counterparts, perhaps owing in part to the larger share of digital marketing budgets allocated to digital advertising (12.6% versus 11.5% for analytics, according to "Presentation for CMO Spend Survey 2015: Eye on the Buyer"); see the Vendors to Watch section.

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