FOR B2B MARKETING PROFESSIONALS

Vendor Landscape: European Marketing Automation Vendors, 2016

Unique Requirements Drive Slower But Steady Martech Adoption

by Peter O'Neill
July 8, 2016

Why Read This Report

A wealth of new marketing automation technologies are now available to help B2C marketers manage customer engagement, B2B marketers manage leads, and all marketers manage other marketing processes, such as campaigns and digital asset management. Forrester has tracked European martech vendors based on client inquires and surveys for the past five years; this report features profiles of all the vendors new to this analysis in 2016 as well as those featured in previous reports.

Key Takeaways

Be Aware Of The Changing Landscape
Marketing automation platforms are reaching new heights, with many now capable of supporting buyer engagement. As this comes to fruition, vendors need to be mindful that adoption levels for marketing applications have significantly changed for European business-to-business (B2B) marketers.

European Vendors Offer Innovative Solutions
Forrester has been exploring and highlighting the most innovative marketing automation vendors in Europe for the past five years. Dive into this report to see our updated portfolio of the vendors best addressing specific buyer needs with innovative and unique solutions.

Focus On Your Local Needs When Automating
The European marketing landscape requires a different set of marketing automation areas and levels to be successful than in North America. Instead of striking forth with a one-size-fits-all approach, marketing vendors must be aware of these requirements, providing assurance to their buyers that they cover these differences.

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by Peter O'Neill
with Carlton A. Doty, Rusty Warner, Matthew Camuso, and Rachel Birrell
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Notes & Resources

In preparation for this report, Forrester researched and interviewed 25 leading marketing automation vendors for their insights. Forrester also used data from Forrester's Global Business Technographics® Marketing Survey, 2015.

Related Research Documents

Combine Systems Of Insight And Engagement For Contextual Marketing

European B2B Marketers Will Invest In Automation In 2013

Marketing Automation Success With European Companies

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Marketing Technology Must Now Support Marketing In Context

A wealth of new marketing automation technologies have emerged in recent years to help B2C marketers manage customer engagement, B2B marketers manage leads, and marketers of both types manage other marketing processes, such as campaigns and digital asset management (DAM). Many early marketing automation projects were standalone implementations, with little integration to back-office systems.[1] Now, as marketing automation projects become enterprise-level implementations, Forrester advises marketers to collaborate with their technology management counterparts and implement technologies that align with systems of insight and engagement to deliver contextual marketing (see Figure 1).[2]

FIGURE 1 Enterprise Marketing Technologies Support Systems Of Insight And Engagement
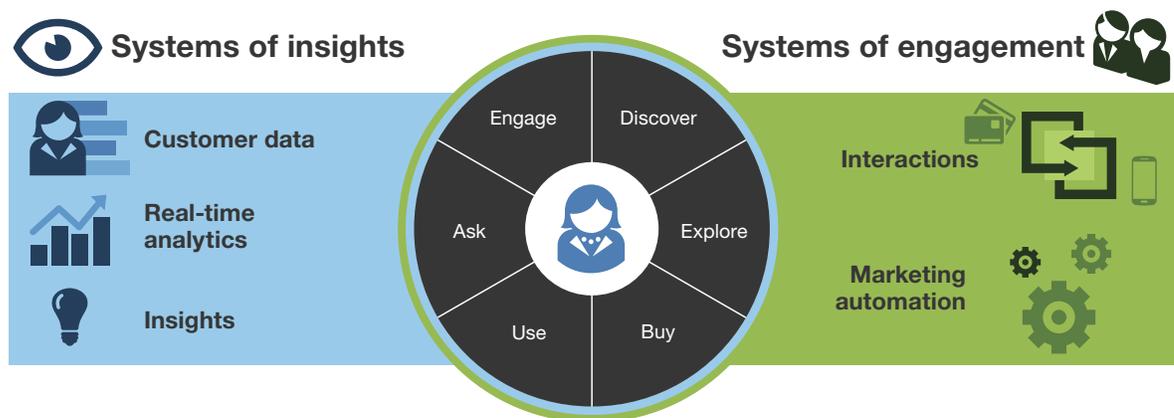
European Marketers Face Unique Challenges

European marketers are traditionally more hesitant about investing in standalone technology projects, leading to a perception that they are late adopters. This is strengthened by the fact that European businesses must also deal with a complex regulatory environment regarding how they can use consumer data, affecting investments in both systems of insight and systems of engagement.

In 2014, Forrester observed a change in European buyer behavior and a propensity to catch up on their marketing technology investments.[3] This trend has continued, with an increasing sense of urgency. When we asked marketers about their most important organizational concerns related to achieving

50% of European marketers say their most pressing issue is that they "don't have the right technology."

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their marketing priorities in Forrester's Global Business Technographics Marketing Survey, 2015, 50% of 248 European marketing professionals surveyed stated that they "don't have the right technology."[4] And European companies now have stronger plans to invest in marketing software than their North American peers for almost every category listed (see Figure 2).

FIGURE 2 European Marketers Invest In Marketing Technology

"What are your marketing organization's plans to adopt the following software technologies or services?"
(Planned or expanding)

Category	Europe	North America
Marketing automation	77%	63%
Analytics	85%	81%
Online marketing	85%	86%
Mobile marketing	83%	74%
Ad technology	77%	65%
Voice of the customer technology	79%	61%
Sales	85%	75%
Digital experience delivery	80%	71%
Content management	84%	85%

Base: 434 North American marketing decision-makers and
248 European marketing decision-makers

Source: Forrester's Global Business Technographics® Marketing Survey, 2015

European Marketing Organizations Differ In Structure, Partnerships, And Focus

Not all international marketing automation vendors see Europe as an exciting business opportunity; the cliché of European companies being slower to innovate than North American companies continues to rule go-to-market priorities for many of these vendors.[5] "Slower" may not be the right word; a general comparison of Forrester's inquiries with North American and European clients shows that Europeans

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are more considered and detailed when planning their project investments, especially when it comes to automation. And this is not just the case for martech: Most of the tech vendors that we speak with discover that sales cycles are longer and generally more complex in Europe, with multidisciplinary buying centers. Further, marketing and sales disciplines are markedly different in Europe than in North America. Our survey results show that European businesses:

› **Have federated marketing organizations.** In our survey, 59% of marketers in Europe described their organization as federated compared with just 36% in North America. This reflects the fragmentation of the target markets that European firms sell to: They need to use many more channels, languages, and messages to be effective.

› **Rely heavily on channel partners.** Nearly one-third of the European marketers we surveyed stated that their channel partners were their primary sales channel, compared with 11% in North America; in contrast, 32% of North American marketers saw direct sales as their primary sales channel, but just 12% of their European peers did so.[6] The result? Marketing and sales enablement projects are quite different, with a stronger need for through-channel marketing in Europe.[7]

› **Focus on relationship marketing.** Our European respondents revealed a marked difference in the customer life-cycle phases that they address, which has an impact on the style, tone, and objectives of their respective marketing campaigns. North American marketers more heavily target the phases up to the buy point of the life cycle, while their European peers focus more on the relationship phases (see Figure 3).

› **Must manage complex data security and privacy regulations.** Data privacy regulations differ widely from country to country in Europe, but they are generally stricter than in North America.[8] Additionally, prospect and customer lists are usually disjointed across countries and less suitable for pan-European automation projects. All of this contributes a large degree of complexity to cross-country European marketing campaigns, making it difficult for marketers to leverage automation at scale.

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FIGURE 3 European Marketers Have Different Objectives
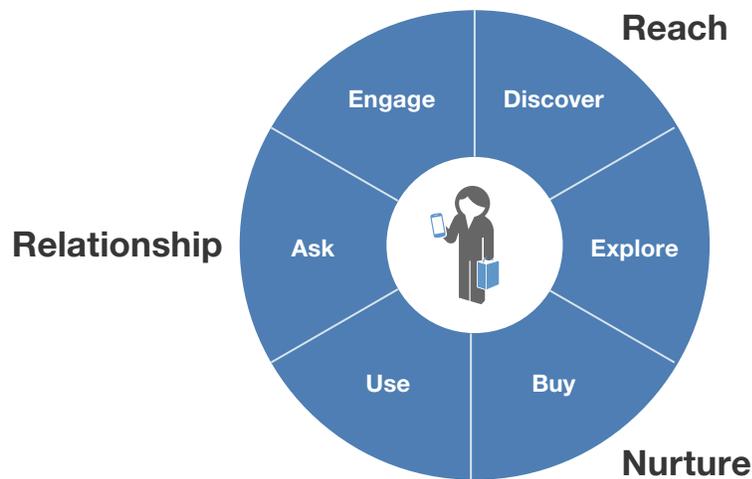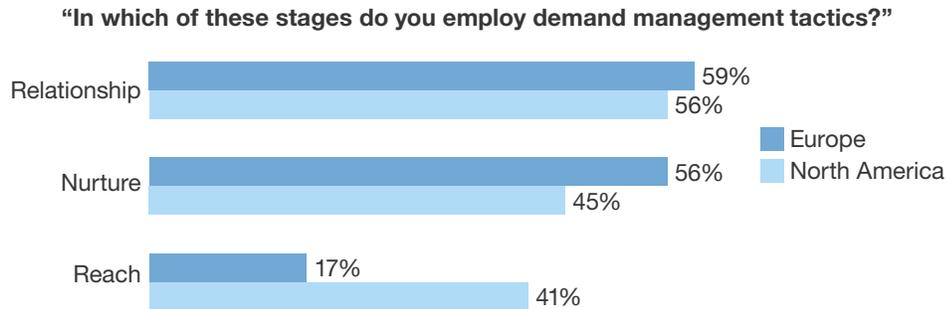
"In which of these stages do you employ demand management tactics?"

Base: 434 North American marketing decision-makers and
248 European marketing decision-makers

Source: Forrester's Global Business Technographics® Marketing Survey, 2015

The European Marketing Technology Industry Is Well Established

Local marketing automation vendors are flourishing in Europe and often provide unique solutions that successfully address the specific needs of European marketers. Forrester has tracked European martech vendors based on client inquires and surveys for the past five years.[9] We've updated our profile for each of the vendors that replied to our 2016 survey, with the exception of those companies that have been acquired (see Figure 4 and see Figure 5).[10] And during the past 18 months, Forrester clients have brought our attention to over a dozen additional European-headquartered vendors. Here, we offer profiles of all of the vendors that are new to this analysis in 2016 as well as those featured in the previous reports, organized by their country of origin.[11]

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FIGURE 4 Marketing Automation Tools Made In Europe, 2016: Relative Revenue And Customer Base

Company	Solution area	Headquarters	Relative revenue	Relative customer base size
Actito	Agile marketing automation	Belgium	€	👥
ADAM Software	Integrated content management	Belgium	€€	👥
Adestra	Email marketing automation	UK	€€	👥
Azalead Software	B2B account based marketing	France	€	👤
BrandMaker	Marketing management	Germany	€€	👥
Celum	Digital asset management	Austria	€€	👥
censhare	Digital experience platform	Germany	€€	👤
CleverTouch	Marketing automation integration	UK	€	👤
Confirmit	Customer dialogue and feedback management	Norway	Did not disclose	👥
dotmailer	Email marketing automation	UK	€€	👥👥
Elateral	Multichannel content customization and distribution	UK	€	👤
Emarsys	B2C marketing cloud	Austria	€€€	👥👥
idio	Content intelligence platform	UK	€	👤

€: less than €10 million
€€: €10 million to less than €30 million
€€€: €30 million or more

👤 = 1 to 200
👥 = 201 to 999
👥👥 = 1,000 or more

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FIGURE 4 Marketing Automation Tools Made In Europe, 2016: Relative Revenue And Customer Base (Cont.)

Company	Solution area	Headquarters	Relative revenue	Relative customer base size
Limber	Content marketing automation	France	€	👤
Optivo	Email marketing automation	Germany	Did not disclose	👥👥
SDL	Content management automation	UK	€€€	Did not disclose
SendinBlue	Email marketing automation	France	€	👥👥
Showpad	Content activation platform	Belgium	Did not disclose	👥
Sitecore	Marketing content management	Denmark	€€€	👥👥
SmartAssistant	Interactive guided selling solution	Austria	€	👤
SmartFocus	Personalization message automation	UK	€€€	👥👥
Splio	Customer experience management	France	€€	👥
Synthesio	Conversational marketing management	US	Did not disclose	👥
Teradata Marketing Applications	Digital marketing platform	Germany	€€€	👥👥
Webmecanik	Marketing automation for agencies	France	€	👤

€: less than €10 million
€€: €10 million to less than €30 million
€€€: €30 million or more

👤 = 1 to 200
👥 = 201 to 999
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FIGURE 5 Marketing Automation Tools Made In Europe, 2016: Customer Locations And Primary Market Segment

| | Customer base | | | | |
Company	North America	Europe, the Middle East, and Africa (EMEA)	Asia Pacific	Primary market segment	Non-headquarters locations
Actito	0%	100%	0%	Midmarket	France
ADAM Software	60%	40%	0%	Enterprise	US
Adestra	15%	84%	1%	Midmarket	Australia, US
Azalead Software	9%	90%	1%	Enterprise	US
BrandMaker	20%	75%	5%	Midmarket	Poland, Russia, UK, US
Celum	35%	60%	5%	Enterprise	France, Germany, Slovakia, US
censhare	18%	80%	2%	Enterprise	France, India, Switzerland, UK, US
CleverTouch	20%	80%	0%	Enterprise	None
Confirmit	43%	48%	9%	Did not disclose	Australia, Canada, China, Germany, Russia, UK, US
dotmailer	4%	95%	1%	Did not disclose	Australia, US
Elateral	66%	28%	6%	Enterprise	US
Emarsys	10%	70%	20%	Midmarket	Australia, China, France, Germany, Hong Kong, Latin America, Russia, Singapore, Switzerland, Turkey, UAE, UK, US
idio	40%	60%	0%	Enterprise	US

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FIGURE 5 Marketing Automation Tools Made In Europe, 2016: Customer Locations And Primary Market Segment (Cont.)

| Company | Customer base | | | Primary market segment | Non-headquarters locations |
	North America	Europe, the Middle East, and Africa (EMEA)	Asia Pacific		
Limber	0%	100%	0%	Midmarket	France
Optivo	1%	99%	0%	Midmarket	Czech Republic, Netherlands, Poland, Switzerland, Turkey
SDL		Did not disclose		Did not disclose	Australia, Belgium, Brazil, France, Germany, India, Japan, Singapore, South Korea, Spain, US, Vietnam
SendinBlue	10%	85%	5%	Small	India, US
Showpad	43%	55%	2%	Enterprise	UK, US
Sitecore	45%	35%	15%	Enterprise/ upper midmarket	Australia, Austria, Canada, China, France, Germany, Indonesia, Japan, Netherlands, New Zealand, Norway, Singapore, Sweden, Switzerland, Ukraine, UK, US
SmartAssistant	30%	70%	0%	Midmarket	Italy, Mexico, Poland, UK, US
SmartFocus	30%	60%	5%	Enterprise	Belgium, Denmark, France, Hong Kong, Spain, Sweden, US
Splio	0%	67%	16%	Midmarket	Brazil, China, Italy, Poland, Spain
Synthesio	54%	38%	8%	Enterprise	France, Singapore, UK
Teradata Marketing Applications	15%	80%	5%	Midmarket	Denmark, France, Germany, Italy, Israel, Netherlands, Spain, UK, US
Webmecanik	5%	95%	0%	Small	Germany, UK

Vendors Originating In Austria

This category includes:

› **Celum.** This company started to help marketers with their content management processes back in 1999. Keeping up with the modern, increasingly digital challenges of its customers, it now provides a DAM system to 800 companies, many of them enterprises. Its clients report that Celum's major value is its ability to easily integrate with other systems in the enterprise environment.[12]

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> **Emarsys.** This vendor's eMarketing suite automates email, mobile, and social marketing campaigns for more than 1,000 blue-chip clients. Emarsys customers can integrate their customer data; analyze it with campaign data; and create relevant, automated, and ad hoc campaigns through multiple channels to ensure that they effectively engage with customers and prospects.[13]

> **SmartAssistant.** Originally an established guided selling agency, this company created a software platform in 2012 to enable marketers to build a very detailed profile of a customer's needs and demographics, while gathering the prospect's requirements within a guided selling process. More than 50 midsize or enterprise organizations across the world now use the technology to help eCommerce visitors customize the most suitable product offering.

Vendors Originating In Belgium

This category includes:

> **Actito.** Actito has a relationship marketing software suite that offers a broad feature set in an intuitive interface, supporting email, web to print, and couponing. This software-as-a-service (SaaS) platform enables companies to create and maintain a meaningful dialogue with their prospects and clients. Actito serves primarily medium-size businesses in the automotive, financial, entertainment, and health sectors.

> **ADAM Software.** ADAM Software offers a platform to support marketing operations. Well positioned to support large-scale, multinational deployments within marketing departments, it plans to move further into the marketing execution space with a solution to support basic product catalog management needs. Forrester has already recognized ADAM Software for its comprehensive, forward-thinking vision of using DAM as the backbone for a customer experience management and marketing execution ecosystem.[14]

> **Selligent.** HGGC acquired both Selligent and StrongView in 2015; together, they operate as Selligent. The merger of Selligent's largely midmarket European cross-channel campaign management business with StrongView's mainly North American email marketing business creates a compelling alternative to so-called "marketing cloud" solutions for non-enterprise buyers. Selligent provides data management, campaign automation, personalization, and channel delivery capabilities.[15]

> **Showpad.** This company is active in a subcategory of DAM and supports the sales enablement process and especially on mobile devices. Showpad extends the process and value of lead-to-revenue management (L2RM) automation into field sales, channel partners, and service organizations. Marketers can use the system to ensure that sales staff have the latest version of content and to monitor its usage.[16]

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Vendors Originating In Denmark

This category includes:

› **Sitecore.** Copenhagen-based Sitecore takes an all-in-one approach to digital experience management with an offering that includes web content management and tools for analytics, marketing automation, email, mobile, eCommerce, and social. Sitecore specifically built its tools to be part of the same offering, so the user experience is consistent and workflows are integrated. Sitecore has a strong presence in EMEA and is gaining traction in international markets.[17]

Vendors Originating In France

This category includes:

› **Azalead Software.** Founded just two years ago, this vendor already has 80 enterprise and midsize clients in France and other countries. Azalead Software has an "all-in-one" international solution covering many account-based marketing (ABM) technologies, such as retargeting, buying signal analytics, and website personalization. It was also the first to offer a mobile ABM app to the market.

› **Limber.** French startup Limber offers a "content-centric" digital marketing platform to help marketers rapidly reuse content in other channels. A marketer can easily turn a blog article containing three images into five different tweets, three Facebook posts, and three emails, and can distribute them over time to generate quality, organic traffic for the original content. Clients of Limber tell us that they are able to improve the return on investment of their content marketing programs because of their ability to deploy the same content assets across many channels easily.

› **SendinBlue.** This vendor services over 17,000 small businesses across multiple European countries with a marketing automation platform covering email and SMS marketing. The company addresses European marketers' concerns about data privacy and security by marketing its offering as "data stored and managed in Europe."

› **Splio.** This vendor provides SaaS-based customer experience management solutions for multichannel campaign management, engagement and loyalty management, and in-store clienteling. It focuses on the retail sector and has customers in Europe, Asia Pacific, and South America.

› **Synthesio.** Synthesio is an enterprisewide listening platform vendor that Forrester has already recognized for its global data coverage, automated analysis built from human coding, and functional dashboard. The vendor is well suited for marketers in regulated industries like pharmaceutical or financial services.[18]

› **Webmecanik.** This vendor relaunched in 2014 and provides a digital marketing platform for over 100 small and medium-size businesses (SMBs), selling primarily through marketing agencies. Uniquely among marketing automation vendors, its tagline is "marketing automation for agencies."

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Vendors Originating In Germany

This category includes:

› **BrandMaker.** Headquartered in Karlsruhe, BrandMaker has been delivering through-channel marketing automation (TCMA) solutions to large brands and manufacturers across Europe for several years, and it is now expanding into North and South America. The company's European DNA — reflected in its multilingual, multicurrency, and multicultural product — has helped it acquire about 200 customers in over a dozen industries for its TCMA offering.[19]

› **censhare.** Founded in 2001, censhare solves European marketers' problems by deploying an extremely customizable DAM platform, including reporting and integration to other systems. With 150 active clients, including over 100 enterprises across Europe, censhare is well established in the European market landscape.

› **Optivo.** This vendor provides over 1,300 SMBs with a marketing automation platform that emphasizes ease-of-use for nontechnical people. It includes campaign management and content management functions as well as segment analysis and reporting. As with many European solutions, it offers standard interfaces to other systems, such as eCommerce, CRM, and analytics systems, that these companies also use.

› **Teradata Marketing Applications.** Formerly eCircle, Teradata Marketing Applications is part of the Teradata solutions portfolio; as such, Forrester can no longer obtain or estimate business results specific to the acquired entity. However, Forrester estimates that over 1,000 midsize companies use one or more of TMA's marketing solutions, many of them attracted by Teradata's compliance with European privacy regulations.[20]

Vendors Originating In Israel

This category includes:

› **SalesPredict.** This company provides B2B customer insights that tell marketing and sales teams all they need to know about where their customers are in the buyer journey and recommends how to move them to the next stage of the journey. SalesPredict also provides a marketing dashboard that contains information about conversion rates, broken down into the various lead segments, plus recommendations on conversion improvement.

Vendors Originating In Norway

This category includes:

› **Confirmit.** This company helps marketers collect customer feedback. Confirmit customers can distill that information and create actionable feedback from it, enabling them to provide their customers with superior products and services.[21]

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Vendors Originating In The Netherlands

This category includes:

› **BlueConic.** BlueConic provides what Forrester calls a microsuite within the digital experience landscape, with a core offering for data management testing and optimization. The company originated in the Netherlands and recently relocated to Boston, Mass.[22]

Vendors Originating In The UK

This category includes:

› **Adestra.** This company provides a SaaS-based email marketing platform that incorporates advisory services through in-app live chat, fast phone, and email response. The solution is well suited for small and medium-size businesses, but the vendor's customization features and service offering mean it is also successful with enterprise clients, especially those marketing departments that lack the skills to take full advantage of the benefits of the technology solutions available to them.[23]

› **CleverTouch Marketing.** This company provides an integration platform that reduces complexity in larger marketing automation implementations via middleware products like its integration hub and data optimization technology. Increasingly, it is also developing end user solutions to address gaps in the feature sets of existing automation solutions.

› **dotmailer.** This vendor recognized early on that most SMB marketing teams are resource-light but still desire sophisticated marketing programs. Its email marketing automation platform enables marketers to succeed with less reliance on tech management support and other services. Over 3,000 European SMBs use dotmailer's system for marketing campaigns as well as for integrations to eCommerce and CRM processes.[24]

› **Elateral.** Over 100 global brands use the Elateral platform for multichannel content generation, adaptation, and distribution. The UK-headquartered company has facilities and resources across both the US and Europe. It augments its delivery and support capabilities, capacity, and global reach via strategic partnerships with top-tier service partners.[25]

› **idio.** This vendor helps marketers run fully personalized marketing campaigns without the long setup process that many higher-level marketing automation systems require. It personalizes on the individual level — not on segments or personas. The firm has had the most success with enterprises that have lots of content and many different product propositions: financial services companies, technology vendors, and media firms.[26]

› **SDL.** This company provides a global web content management platform, translation technologies, and translation services for over 1,500 international enterprises that deploy content in multiple languages to multiple websites and devices.[27] Its product businesses account for approximately

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36% of the company's total revenues, and SDL reports that it books 56% of its revenues in EMEA, 34% in North America, and 10% in Asia Pacific. Its top four customers are Microsoft, Semcon, BlackBerry, and Dell.[28]

› **SmartFocus.** This French/UK company was originally called EmailVision.[29] Its Message Cloud solution uses natural language processing (NLP) technology to improve content delivery for over 2,000 companies. Seventy percent of its business is B2C, with 45% in retail, 15% in fast-moving consumer goods (FMCG), and 15% in travel and leisure.

Recommendations

Plan For The Inevitable Systems Integration

Despite the promise of enterprise marketing suites, marketers aren't going to buy everything they need from one vendor, whether that vendor is international or country-specific.[30] To get the most out of their technology capabilities and investment, marketers should:

› **Ensure coverage across systems of insight and engagement.**[31] Marketers often have overlapping or redundant capabilities provided by different vendors, thanks to siloed purchases. This makes it difficult to streamline and coordinate customer interactions — which means inconsistent or disruptive experiences for customers. Align your marketing technology tools with Forrester's systems of insight and engagement categories, then identify where you can either eliminate or integrate functionality. From there, you can begin to manage your contextual marketing capabilities much more effectively.

› **Create a shortlist of vendors for strategic partnerships.** Although the vast majority of vendors profess to offer strategic consulting, only a select few are the right match for your organization as you make contextual marketing a priority. This is of particular importance when North American vendors are marketing in Europe; they often fail to prepare their local partnerships. Make a list of the top traits you want from partners — from cultural fit to technical capabilities — and evaluate your current roster against that list. Narrow the options down to those that fit the bill, then bring your team and each firm together to plan the approach and align roles.

› **Collaborate with tech management now — or regret it later.** If marketing is not already working with the CIO's organization, everyone is at a disadvantage. Tension between these two groups historically runs high in many companies, but the requirements to deliver contextual marketing will quickly go beyond what marketers can manage alone. Your CMO must convince your CIO to jointly develop a BT agenda. Leverage this agenda to involve your tech management colleagues in the process of choosing, implementing, and integrating enterprise marketing technology components that outpace ever-increasing customer expectations.

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Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

Ask a question related to our research; a Forrester analyst will help you put it into practice and take the next step. Schedule a 30-minute phone session with the analyst or opt for a response via email.

Learn more about inquiry, including tips for getting the most out of your discussion.

Analyst Advisory

Put research into practice with in-depth analysis of your specific business and technology challenges. Engagements include custom advisory calls, strategy days, workshops, speeches, and webinars.

Learn about interactive advisory sessions and how we can support your initiatives.

Supplemental Material

Forrester's Global Business Technographics Marketing Survey, 2015, was fielded to 1,039 marketing decision-makers located in Brazil, Canada, China, France, Germany, India, the UK, and the US from small and medium-size businesses (SMBs) and enterprise companies with 100 or more employees (in Brazil, China, India) or 500 or more employees (in Canada, France, Germany, the UK, and the US). This survey is part of Forrester's Business Technographics and was fielded from May 2015 to August 2015. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Forrester's Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Forrester's Q2 2016 EMEA Marketing Automation Market Overview Questionnaire Survey was fielded to 25 European martech vendors during Q2 2016. We explored perceptions of the competitive landscape, the challenges that respondents have faced and anticipate, as well as opportunities for growth. Participants were also asked to categorize their primary production solutions within the general

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category of marketing automation. Forrester has tracked European martech vendors based on client inquires and surveys for the past five years; this survey gathered information to provide a vendor landscape for marketing automation in Europe.

Companies Interviewed For This Report

Actito	Limber
ADAM Software	Optivo
Adestra	SDL
Azalead Software	SendinBlue
BrandMaker	Showpad
Celum	Sitecore
censhare	SmartAssistant
CleverTouch Marketing	SmartFocus
Confirmit	Splio
dotmailer	Synthesio
Elateral	Teradata Marketing Applications
Emarsys	Webmecanik
idio	

Endnotes

[1] In 2012, Forrester's original taxonomy for enterprise marketing software had four categories: marketing management, brand management, relationship marketing, and online marketing.

[2] Systems of insight and systems of engagement are broad classes of business technology software; enterprise marketing technologies are a subset of these capabilities. See the "Combine Systems Of Insight And Engagement For Contextual Marketing" Forrester report.

[3] As the marketing automation market matures, more North American vendors will enter Europe and compete, but they may be too late. As in any market, the most important key to success for technology vendors and service providers — now accentuated in the age of the customer — will be learning to market and sell locally. See the "Marketing Automation Success With European Companies" Forrester report.

[4] We asked respondents to Forrester's Global Business Technographics Marketing Survey, 2015, to rate various organizational concerns related to achieving their marketing priorities. Some 50% of Europeans rated "don't have the right technology" as 4 or 5 on a scale from 1 (not a challenge at all) to 5 (a major challenge). In terms of responses by country, 44% of UK marketers rated this 4 or 5, as did 49% in France and 59% in Germany — compared with 25% in North America. Source: Forrester's Global Business Technographics Marketing Survey, 2015.

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5   Many North American marketing automation vendors have not yet entered the European theater or have opened just one European office, staffed with multilingual employees, to support their telemarketing efforts (albeit unsuccessfully).

6   B2B marketers were more likely to state that their channel partners were their primary sales channel: 29% did so, compared with 13% of B2C marketers. Curiously, the percent of marketers feeding leads to their direct sales force was higher in B2C than in B2B — at 28% and 22%, respectively.

7   In response to strategic channel marketing initiatives, the through-channel marketing automation (TCMA) market has exploded in terms of number of vendors. This report evaluates the top TCMA vendors' solutions on such criteria as architectural federation, C3 (command, control, and communications), user experience, business intelligence/ analytics, integration, and pricing and distribution models. See the "The Forrester Wave™: Through-Channel Marketing Automation Platforms, Q3 2015" Forrester report.

8   The European Union continues to set the global data privacy standard. Unsurprisingly, the countries that best protect personal data are predominantly members of the EU. Non-European countries are slowly adopting the EU's approach to data privacy. See the "Forrester's 2015 Data Privacy Heat Map" Forrester report.

9   As the marketing automation market matures, more North American vendors will enter Europe and compete, but they may be too late. As in any market, the most important key to success for technology vendors and service providers — now accentuated in the age of the customer — will be learning to market and sell locally. See the "Marketing Automation Success With European Companies" Forrester report.

10   Curiously, once a European company is acquired, it is quickly absorbed into the parent company. Even if it does not disappear as a separate brand, it is no longer possible for Forrester to obtain or estimate business results specific to the acquired entity. The corporate response is often, "We do not break down our business to that level." One exception is Teradata, which returned the questionnaire about the German company Teradata Marketing Applications (formerly eCircle), which it acquired in 2012.

11   Some US-headquartered companies have overly heavy European business due to their acquisitions of European vendors. This includes Adobe, which acquired Neolane, and PitneyBowes, which acquired Portrait. These were not included in the survey, as the subsidiaries do not provide separate information.

12   Customer insights (CI) professionals use marketing resource management (MRM) tools to manage marketing operations, such as planning, budgeting, content production, and process workflows. Historically, direct marketers purchased enterprise MRM with cross-channel campaign management, while digital marketers leveraged channel-specific capabilities. But real-time contextual marketing demands a more agile approach to MRM that supports insight-driven engagement strategies. This brief answers five common questions that CI pros have about MRM. See the "Q&A: Top Five Marketing Resource Management Questions Answered" Forrester report.

13   In our 26-criteria evaluation of cross-channel campaign management providers, we identified the 15 most significant ones — Adobe, Emarsys, Experian Marketing Services, IBM, Oracle, Pegasystems, Pitney Bowes, RedPoint Global, Salesforce, SAS, SDL, Selligent, SmartFocus, Teradata, and Teradata Marketing Applications — and researched, analyzed, and scored them. See the "The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016" Forrester report.

14   In Forrester's 38-criteria evaluation of digital asset management (DAM) vendors, we identified the 10 most significant software providers — ADAM Software, Adobe, Canto, Celum, HP, MediaBeacon, NorthPlains On Brand, North Plains Telescope, OpenText, and Widen — in the category and researched, analyzed, and scored them. See the "The Forrester Wave™: Digital Asset Management For Customer Experience, Q4 2014" Forrester report.

15   Selligent declined to participate in Forrester's Q2 2016 EMEA Marketing Automation Market Overview Questionnaire Survey for this report. For greater insight into Selligent's product and position, see the "The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016" Forrester report.

FOR B2B MARKETING PROFESSIONALS

Vendor Landscape: European Marketing Automation Vendors, 2016
Unique Requirements Drive Slower But Steady Martech Adoption

July 8, 2016

[16] B2B marketing content fuels both effective demand creation and successful sales conversations. This report describes how B2B marketers can help sales become an effective content concierge by investing in delivery systems that: 1) enable sales to become content experts, 2) make it straightforward to find the content reps want and need, and 3) track usage and feedback to incorporate into future content planning and execution. See the "Make Sales Conversations An Integral Part Of Your Content Marketing Plans" Forrester report.

[17] In Forrester's 40-criteria evaluation of digital experience platform vendors, we identified the 10 most significant software providers — Acquia, Adobe, Demandware, EPiServer, IBM, Oracle, SAP hybris, Salesforce, SDL, and Sitecore — in the category and researched, analyzed, and scored them. See the "The Forrester Wave™: Digital Experience Platforms, Q4 2015" Forrester report.

[18] In our 30-criteria evaluation of enterprise social listening platform providers, we identified the 12 most significant ones — Brandwatch, Cision, Clarabridge, Crimson Hexagon, NetBase, Networked Insights, Oracle, Prime Research, Salesforce, Sprinklr, Synthesio, and Sysomos — and researched, analyzed, and scored them. See the "The Forrester Wave™: Enterprise Social Listening Platforms, Q1 2016" Forrester report.

[19] BrandMaker has a diverse customer set comprising B2B2B and B2B2C marketers. Flexible decentralized operations are enabled via a digital marketing center for email, retargeting, performance display, and social media. The product also supports vehicles for the offline world (e.g., print advertisements, trade-show booths, posters, and printed collateral). See the "The Forrester Wave™: Through-Channel Marketing Automation Platforms, Q3 2015" Forrester report.

[20] Despite concerns about the planned divestiture, customers said they were willing to "wait and see" how things go. One reference, who had purchased eCircle prior to its acquisition, told us that "things slowed down" with Teradata, and he is "hoping the new buyer puts in some investment." (Marlin Equity Partners purchased Teradata Marketing Applications for $90 million in April 2016.) See the "The Forrester Wave™: Cross-Channel Campaign Management, Q2 2016" Forrester report.

[21] In the past year, the already-dynamic customer feedback management (CFM) market has further evolved, requiring customer experience (CX) professionals to navigate a changed vendor landscape. This report gives CX pros the crucial insights they need to understand their CFM options. See the "What's New With Customer Feedback Management Vendors" Forrester report.

[22] We didn't interview this company for this report, but it receives this "honorable mention" as it originated in Nijmegen, Netherlands. See the "Vendor Landscape: Digital Experience Platforms" Forrester report.

[23] The CCCM market is diverse and continues to attract innovation and specialization. "The Forrester Wave™: Cross-Channel Campaign Management, Q3 2014" features an in-depth evaluation of nine of the top vendors. However, a host of other vendors offer compelling solutions that address various buyer requirements. See the "Brief: Three Reasons To Consider Alternatives For Cross-Channel Campaign Management" Forrester report.

[24] There's no doubt about it: Contextual marketing will reorient the role that email plays in your digital marketing toolkit. But marketing leaders need not abandon existing email campaigns in the name of adopting a contextual approach. The climate is ideal for innovating to improve your existing campaign performance while also laying the groundwork for more advanced approaches. This report identifies the key email innovations you should prioritize to get the most out of email marketing in the future. See the "The Time Is Right For Email Innovation" Forrester report.

[25] Historically, direct marketers purchased enterprise MRM with cross-channel campaign management, while digital marketers leveraged channel-specific capabilities. But real-time contextual marketing demands a more agile approach to MRM that supports insight-driven engagement strategies. This brief answers five common questions that CI pros have about MRM. See the "Q&A: Top Five Marketing Resource Management Questions Answered" Forrester report.

[26] How is content influencing audiences? Is your brand forging the basis of better long-term and more efficient relationships with existing and future customers? And how is all of this activity contributing to the business' success? These hard questions demand both analytical acumen and sound strategic judgment from marketers. Read this report

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to determine the value of your content, including how to measure if it changes customers' attitudes toward your brand and ultimately drives positive business outcomes. See the "Measurement Powers Content Marketing Success" Forrester report.

[27] Source: "About," SDL (http://www.sdl.com/about/).

[28] In Forrester's 40-criteria evaluation of digital experience platform vendors, we identified the 10 most significant software providers — Acquia, Adobe, Demandware, EPiServer, IBM, Oracle, SAP hybris, Salesforce, SDL, and Sitecore — in the category and researched, analyzed, and scored them. See the "The Forrester Wave™: Digital Experience Platforms, Q4 2015" Forrester report.

[29] EmailVision acquired SmartFocus, kept the name, and sold the IP to Blue Sheep, which operates it as Blue Venn. It also moved the HQ from France to the UK, secured additional funding from Francisco Partners, and has made multiple acquisitions for machine learning, big data analytics, natural language processing, social media listening, and virtual beacon technology, among others. For more information, see the "The Forrester Wave™: Real-Time Interaction Management, Q3 2015" Forrester report.

[30] During Forrester's 2014 evaluation of the EMSS market, 70% of survey respondents told us, "The majority of the functionality should come from one vendor," but only 55% supported the statement, "A single vendor can provide all of the capabilities we need." Source: Forrester's Q2 2014 Global Enterprise Marketing Software Suite Customer Reference Online Survey.

[31] The marketing technology landscape has changed dramatically since Forrester first charted it in 2007. What's new in 2016? Marketers' sophistication, ever-changing customer expectations, and continued vendor consolidation are driving the need to assemble contextual marketing engines based on systems of insight and engagement. See the "Combine Systems Of Insight And Engagement For Contextual Marketing" Forrester report.

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