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The Forrester Wave™: Email Marketing Service Providers, Q2 2020

The 13 Providers That Matter Most And How They Stack Up

by Shar VanBoskirk
May 12, 2020

Why Read This Report

In our 23-criterion evaluation of email marketing service providers, we identified the 13 most significant ones — Acoustic, Adobe, Bluecore, Braze, Cheetah Digital, Cordial, dotdigital, Epsilon, Exponea, Iterable, Oracle, Salesforce, and Zeta Global — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketers select the right one for their needs.

Key Takeaways

Zeta Global, Epsilon, Oracle, And Cheetah Digital Lead The Pack
Forrester's research uncovered a market in which Zeta Global, Epsilon, Oracle, and Cheetah Digital are Leaders; Salesforce, dotdigital, Cordial, Acoustic, Adobe, and Iterable are Strong Performers; and Braze, Bluecore, and Exponea are Contenders.

Data Integration, AI, And Professional Services Differentiate
Today's marketers care about how immediately they can segment off of myriad data types; if AI helps optimize process, not just creative; and if the vendor provides a level of professional services that suits their needs.

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by Shar VanBoskirk
with Mary Pilecki, Robert Perdoni, and Christine Turley
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Newer, Faster Technology Supports Email Marketing Today

Email marketing has always been your most vital tool for driving sales and retention. Now, in the current health and economic crisis, email is playing its most essential role yet: communicating sanitation protocols; location-specific, real-time responses to changing legislative guidance; and new products or efforts to meet urgent needs. The accessibility, reliability, and cost effectiveness of email will actually grow its investment even while budgets for other media and services constrict.[1] The stakes around selecting a vendor partner are higher now than in years past. But vendor options have upped their game. Email service provider buyers will enjoy improved selection this year as:

› **A diverse landscape drives innovation.** New, fast technology from Bluecore, Braze, Cordial, Exponea, and Iterable (all born after 2011) challenges incumbents' data management speed and scale. European natives dotdigital and Exponea set best practices for multilanguage, multicurrency support. And more choice overall allows marketers to shop for specific products, services, and pricing models. For instance, Acoustic offers licenses based on volume of customer records or messages. Bluecore works on a pay-for-performance basis. And Epsilon offers all-in pricing, including technology, data, and services.

› **Vendors specialize.** Large marketing suites and smaller providers alike present specific offerings as well as all-purpose functionality. Zeta Global provides vertical-specific customer data and models. Cheetah Digital's Cheetah Experiences includes a library of widgets to collect zero-party data. Dotdigital's Commerce Intelligence integrates retail and customer dashboards. Bluecore dynamically personalizes retail email content, offers, and layout based on user behavior and business and environmental context. Cordial offers self-service data transformations so that marketers can use non-marketing data, like inventory or supply chain status, to personalize emails.

› **Professional services models accommodate different customer types.** Vendors in this market go back and forth on how much to emphasize operational, strategy, and creative services as they manage their margins and for market demand. In this study, services offering can be an initial filter in the selection process. Cheetah Digital, Epsilon, Oracle, and Zeta Global can function as full-service email agencies, even though they also offer standalone technology. Think of Adobe and dotdigital as tech-first options that have capable services if needed. All others have limited agency services and offer templates, tutorials, workflow, or partner access instead.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on email marketing vendors.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: Email Marketing Service Providers, Q2 2020

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Email Marketing Service Providers

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FIGURE 2 Forrester Wave™: Email Marketing Service Providers Scorecard, Q2 2020

	Forrester's weighting	Acoustic	Adobe	Bluecore	Braze	Cheetah Digital	Cordial	dotdigital
Current offering	50%	3.04	3.09	2.50	2.45	3.96	3.10	2.65
Campaign management	15%	2.20	1.80	2.60	3.80	4.20	3.80	3.00
Dynamic content	15%	2.60	2.40	4.00	3.40	5.00	4.00	3.00
Analytics	5%	3.00	1.00	3.00	3.00	5.00	3.00	3.00
Data integration	15%	3.00	5.00	1.00	3.00	3.00	3.00	1.00
Privacy and security	15%	3.00	5.00	1.00	3.00	3.00	3.00	3.00
Distributed business model support	5%	5.00	1.00	3.00	1.00	5.00	3.00	3.00
Artificial intelligence	10%	5.00	3.00	5.00	1.00	3.00	1.00	3.00
Services	15%	1.80	3.40	1.70	0.80	4.20	3.20	2.00
Vertical capabilities	5%	5.00	1.00	3.00	1.00	5.00	3.00	5.00
Strategy	50%	3.40	2.50	2.20	2.30	3.40	3.40	3.90
Vision	30%	3.00	3.00	1.00	3.00	3.00	5.00	5.00
Innovation roadmap	20%	3.00	1.00	5.00	3.00	3.00	3.00	3.00
Past performance	30%	3.00	4.00	1.00	2.00	3.00	1.00	4.00
Commercial model	20%	5.00	1.00	3.00	1.00	5.00	5.00	3.00
Market presence	0%	3.00	4.00	1.67	1.67	4.33	1.00	2.33
Email marketing revenue	33%	3.00	3.00	2.00	2.00	4.00	1.00	2.00
Globalization	33%	3.00	5.00	1.00	1.00	5.00	1.00	3.00
Email employees	33%	3.00	4.00	2.00	2.00	4.00	1.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Email Marketing Service Providers Scorecard, Q2 2020 (Cont.)

	Forrester's weighting	Epsilon	Exponea	Iterable	Oracle	Salesforce	Zeta Global
Current offering	50%	4.28	2.89	2.56	3.10	3.06	3.85
Campaign management	15%	2.60	3.00	3.80	1.80	1.80	3.40
Dynamic content	15%	3.00	2.40	5.00	3.00	3.00	4.20
Analytics	5%	5.00	5.00	1.00	5.00	5.00	5.00
Data integration	15%	5.00	3.00	1.00	1.00	3.00	3.00
Privacy and security	15%	5.00	5.00	3.00	3.00	3.00	3.00
Distributed business model support	5%	5.00	1.00	3.00	3.00	5.00	3.00
Artificial intelligence	10%	5.00	3.00	1.00	5.00	5.00	5.00
Services	15%	4.60	1.50	0.60	4.20	2.60	4.40
Vertical capabilities	5%	5.00	1.00	5.00	5.00	1.00	5.00
Strategy	50%	3.20	1.80	2.80	4.30	3.70	3.70
Vision	30%	5.00	1.00	1.00	5.00	3.00	3.00
Innovation roadmap	20%	3.00	5.00	5.00	3.00	3.00	3.00
Past performance	30%	3.00	1.00	3.00	4.00	4.00	4.00
Commercial model	20%	1.00	1.00	3.00	5.00	5.00	5.00
Market presence	0%	3.33	1.67	1.67	4.67	5.00	3.67
Email marketing revenue	33%	3.00	1.00	2.00	5.00	5.00	4.00
Globalization	33%	3.00	3.00	1.00	5.00	5.00	3.00
Email employees	33%	4.00	1.00	2.00	4.00	5.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Offerings

Forrester included 13 vendors in this assessment: Acoustic, Adobe, Bluecore, Braze, Cheetah Digital, Cordial, dotdigital, Epsilon, Exponea, Iterable, Oracle, Salesforce, and Zeta Global (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Acoustic	Acoustic Marketing Cloud	20.01.3
Adobe	Adobe Campaign Standard	
Bluecore	Bluecore Communicate™	
Braze	Braze	
Cheetah Digital	Cheetah Customer Engagement Suite	
Cordial	Cordial	
dotdigital	Engagement Cloud	
Epsilon	Epsilon PeopleCloud Messaging	
Exponea	Exponea, CDXP	1.162
Iterable	Iterable	
Oracle	Oracle Responsys	
Salesforce	Salesforce Marketing Cloud	
Zeta Global	Zeta Marketing Platform	

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **The Zeta Marketing Platform excels because of its data foundation.** For years, Zeta Global (Zeta) presented to enterprise marketers an affordable but clunky patchwork of acquired applications. In contrast, the Zeta Marketing Platform was built from scratch — and it shows. Its usability could be better. But its schema-less data structure effectively solves much harder problems better than most competitors.

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Zeta Marketing Platform can activate an unlimited number of events, with unlimited metadata, without any database configuration or data definition. And it runs models continuously off of this data to create optimization opportunities. Zeta has a proprietary real-time data repository for identity resolution and profile building. It also supports large professional services teams for creative, strategy, and the setup and execution of campaigns. Zeta is particularly well-suited for enterprises that want full-service support for acquisition and retention efforts. And we expect it to woo eCommerce buyers, too, as it builds a brand around its data tools and makes them easier to use.

› **Epsilon stays strong as an email agency.** A longtime powerhouse in this study, Epsilon continues a model that many email service providers have eschewed: It balances good email technology with the strongest professional services in the study. Forrester finds Epsilon's email business stable one year into its acquisition by Publicis.

Epsilon does miss the alacrity of some of the newer vendors we evaluated. Its data structure doesn't create new attributes automatically as data is collected. And typically, implementation takes three to four months from the time a contract is signed. But client references value this vendor as an extension of their teams and don't notice many shortfalls. Epsilon's PeopleCloud Messaging provides critical data to supplement user profiles. It applies multilayered security controls and offers turnkey access to data permissions and audit trails. Complicated enterprises — especially those with full-service demands — will find Epsilon could be their email marketing soulmate.

› **Oracle delivers renewed email marketing energy.** In this year's evaluation of Oracle Responsys, we felt something that has been missing from our recent past reviews: chemistry. Product leadership syncs with client services directors to plan customer-oriented developments. Oracle data assets and analytics modules extend the utility of Responsys. Client references get more than what they pay for. They and their staff all seem excited by the vendor's vision to "drive revenue growth by delivering a relevant, timely, and connected experience wherever and whenever a customer chooses."

Oracle consistently delivers scale. It has a significant global footprint, industry-specific data schemas, and AI that runs off of email and non-email data, rivaling personalization-specialist competitors. Of course, this vendor still comes with some gotchas. Onboarding data into the platform needs improvement. And it does some things through services that other vendors automate, like create interactive email content. Still, complex enterprises — that are patient enough to take on the longest implementation time in the study — should be pleased with the results.

› **Cheetah Digital solves data, automation, and services needs comprehensively.** Today's Cheetah Digital combines several solutions from recent acquisitions brought to market as the Customer Engagement Suite. It consists of Cheetah Messaging for email and cross-channel marketing, Engagement Data Platform for data management and analytics, Cheetah Experiences for customer acquisition, and Cheetah Loyalty for customer retention. Forrester finds this vendor's data collection, interface navigability, and reporting much improved from our 2018 evaluation of the same functionality.

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The 25% of topline revenue that Cheetah Digital allocates to R&D is well spent. It offers an analytics environment for data exploration and scenario modeling. Cheetah Experiences works in concert with email programs to enable templatized interactive experiences for collecting zero-party data. The Customer Engagement Suite has continuously running AI models to proactively identify optimizations. Cheetah provides one of the largest and most capable professional services teams in the category. The largest, most demanding enterprises should confidently consider Cheetah Digital as either a self-service, hybrid service or agency partner; it can take on most any circumstance.

Strong Performers

› **Salesforce appeals to a mass audience.** Salesforce is consistently a strong option for marketers of any type and sophistication level. It combines the usability of a small business application with resources and infrastructure only possible from a $17 billion firm. This evaluation found Salesforce (expectedly) focused on groundbreaking innovations, while (unexpectedly) average in several key current capabilities.

Salesforce's investment of 15% of global revenue into R&D will add further predictive capabilities and interactivity to its Leader-level embedded AI, data exploration environment, and module for distributed businesses. And it will help create more flexible data integration, storage, and activation — all areas where Salesforce currently lags newer email service providers. Some advanced direct marketers will find that this vendor's dynamic content capabilities don't support their needs for individualization. Even so, Salesforce is a steady way for marketers in any industry to manage their newsletters or promotional messages.

› **Dotdigital holds its own with enterprise marketing cloud competitors.** Publicly traded dotdigital presented itself for the first time in this study as earnest, honest, and winning clients at a rate unmatched by all of its larger competitors. The London-based firm still does most of its business in Europe, but its products and services are offered globally. Landing as a Strong Performer for its consistency across most criteria, dotdigital's current offering scores fall principally in the middle of the road.

Dotdigital offers an expected visual interface for query creation, message design, and multichannel orchestration. Like other vendors, it can integrate some data formats on a batch-based basis or in real time via API or custom integrations. And it has a capable AI for predicting customer tendencies or recommending products. Integrations with commerce platforms like Magento and Shopify, plus its native commerce intelligence functionality, help retailers drive profitable repeat purchases. Marketers who sell direct in their emails should consider this marketing cloud alternative.

› **Cordial brings a personal touch to retail and media marketers.** Cordial's emotionally intelligent approach to marketing technology delivers against its name and brand promise to "send a better message." A newcomer to this study, this vendor's empathy, authenticity, customer obsession, and ownership mentality bring a fresh take into a vendor landscape weary of commoditized feature sets.

Cordial's campaign orchestration is better than firms 100 times its size. It auto-orchestrates content, layout, and channel based on performance against a preset business goal. It also ingests and stores an unlimited amount of any type of data and returns queries off of hundreds of millions of attributes in subseconds. And customers use insights from its continuously running models to improve margins and inventory management, not just campaign performance. Cordial does lack international scale, support for interactive email formats, and has limited creative and operations services. But client references value Cordial's depth over breadth. Retail and media firms with huge product or content catalogues will, too.

› **Acoustic's independence boosts its confidence.** The acquisition of IBM's marketing and commerce assets by private equity firm Centerbridge Partners in July 2019 created the new company Acoustic.[2] It continues the toolset and people that you knew at IBM, but Acoustic's tagline — "Unleash the brilliance of marketers" — demonstrates refreshing aplomb. Acoustic leaders presented us with the assurance of a firm that is well funded and beholden only to making technology to help marketers rather than to a large parent with myriad priorities.

Currently, Acoustic doesn't support in-email interactivity out of the box. Its optimization efforts focus on email content, not higher-level business questions like customer value or inventory management. And its data processing is slower than other vendors in our study. But client references don't require this level of sophistication. And an improved visual UI, open-time personalization, and journey analytics will launch later in 2020. For now, the firm is still best suited for large midmarket emailers with the campaign management savvy to navigate its legacy user interface.

› **Adobe's scale appeals to big, basic buyers.** Adobe Campaign Standard (ACS) represents an entirely hosted application, focused on automating personalized, omnichannel communications for B2C marketers. It's an obvious "yes" for current Adobe Experience Cloud users as Adobe's analytics, content management, and real-time offer management products all extend the functionality of ACS. But ACS also integrates well with partners; the broader Adobe Experience Cloud Platform that underlies ACS enables data onboarding, customization of Adobe applications, and the ingestion of third-party algorithms.

In fact, Adobe's broad resources including abundant developers and services support, staunch privacy and compliance practices, and a global footprint in addition to its tech platform are a stronger draw than its email-specific functionality for enterprise buyers. Some of Adobe's planned developments include capabilities currently live with competitors — like support for Google AMP (a way to script interactivity into emails), guidance and anomaly detection within the campaign orchestration interface, and predictive churn management. Cutting-edge buyers should look elsewhere or wait for ACS to catch up, which is what Adobe's very satisfied client references intend.

› **Buy Iterable for data integration and personalization.** In 2013, Iterable debuted a platform to individualize marketing experiences faster by colocating first-party data and execution. The solution hit a nerve: It now has more than 500 clients, ingests 1 billion events daily, and grew 100%

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in 2019. This venture-backed multichannel optimization firm wins business from more established email marketing service providers because of its NoSQL data model, limitless data storage, and automated segmentation module.

Like the other newcomers to this study, Iterable's differentiation is in its data structure, not its professional services or deployment volume. The vendor's processing power — it can slice 500 million users against 10 custom attributes in under one minute and ingest 10,000 data points per second — makes complex segmentation possible without separate technology. And Iterable codes and stores html "snippets," which can be autoassembled into any channel or layout based on user behavior. Client references do want more sophisticated reporting, and the UI is less slick than more experienced competitors. (Note: Iterable's 2020 roadmap includes work to improve in both of these areas.) High-volume email and mobile messaging senders who can handle some growing pains will find this vendor a worthwhile departure from the mainstream.

Contenders

› **Braze has a good multichannel story but tells it awkwardly.** Originally Appboy, Braze specializes in customizing mobile and email transactional and marketing messages at the content block level. That is, marketers can create, tag, and store html fragments for assembly into mobile or email communications based on real-time customer context. This auto-orchestration of message content, layout, and channel is one of several Leader-level features that Braze demonstrates.

It's modern technology — built 10 years more recently than many competitors — leverages a GUI interface that client references love, is certified ISO 27001 compliant, already has AMP built into its email editor, and can be implemented in just one month. But Braze is less mature than competitors, and it shows. Braze works in English only and has a limited international footprint. It doesn't archive data permissions or audit trails in perpetuity. And its corporate positioning has more braggadocio than clarity. Message-heavy businesses in nonregulated industries should be prepared to help Braze cocreate its product and company destiny.

› **Bluecore drives repeat purchases for retailers (only).** This isn't your typical email service provider. Bluecore is a personalization engine that can send emails. It processes the pantheon of retail data, including online and offline user data, supply chain status, commerce activity, and product information in real time to: 1) trigger contextual messages; 2) customize the content, layout, and frequency of ongoing communications; and 3) create audiences and communications specific to an immediate business circumstance.

Bluecore works exclusively with retailers. Since its focus is on automating the assembly of content at precise moments over batch deployment, it lacks some standard email service provider functionality. Buyers who need a global partner, control over personalization algorithms, or creative services should look elsewhere. But retailers who need to up their repeat purchases and can abide pay-for-performance pricing will find that Bluecore can have them up and running in 45 days.

> › **Introducing Exponea: a little-known email engine with big potential.** This small, independent, European vendor calls itself a CDXP — a customer data experience platform. Exponea launched globally in 2015, specifically to centralize high volumes of data in multiple formats, from myriad sources. The vendor's current strengths and planned developments prioritize data integration, analysis, and security.
>
> Exponea offers self-service tools for data transformation. Clients use its reporting environment for scenario modeling. And its data protection officer is helping to craft European consumer privacy legislation. It does, however, lack the scale and experience of other firms we evaluated. It offers no in-email interactivity, limited support for distributed or franchised businesses, and thin professional services. We'd love for Exponea's data integration and multichannel personalization plans to stimulate innovation from competition. And we hope that its limited size won't handicap its plans to win eCommerce merchants from larger, American marketing clouds.

Evaluation Overview

We evaluated vendors against 23 criteria, which we grouped into three high-level categories:

> › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include campaign management, dynamic content, analytics, data integration, privacy and security, distributed business model support, artificial intelligence, services, and vertical capabilities.

> › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, innovation roadmap, past performance, and commercial model.

> › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's email marketing revenue, globalization, and email employees.

Vendor Inclusion Criteria

Forrester included 13 vendors in the assessment: Acoustic, Adobe, Bluecore, Braze, Cheetah Digital, Cordial, dotdigital, Epsilon, Exponea, Iterable, Oracle, Salesforce, and Zeta Global. Each of these vendors has:

> › A primary functionality segment of email service provider or data integrator from Forrester's Now Tech completed before year-end 2019.

> › Email marketing revenues from September 2018 to September 2019 that are greater than $100 million or revenues that are greater than $10 million and grew 40% or more at the same time.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by February 19th and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] See the Forrester report "The 2020 COVID-19 Crisis Will Stun US Marketing."

[2] Source: "Introducing Acoustic: A New Marketing Cloud Bringing Humanity to AI-Powered Marketing," Business Wire, July 15, 2019 (https://www.businesswire.com/news/home/20190715005462/en/Introducing-Acoustic-New-Marketing-Cloud-Bringing-Humanity).

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