

The Forrester Wave™: Experience Optimization Platforms, Q4 2020

The 10 Providers That Matter Most And How They Stack Up

by James McCormick

November 24, 2020

Why Read This Report

In our 22-criterion evaluation of experience optimization platform (EOP) providers, we identified the 10 most significant ones — AB Tasty, Adobe, Dynamic Yield, Kameleoon, Kibo Commerce, Optimizely, Oracle, Salesforce, SAS, and SiteSpect — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights (CI) professionals select the right one for their needs.

Key Takeaways

Adobe And Salesforce Lead The Pack

Forrester's research uncovered a market in which Adobe and Salesforce are Leaders; Oracle, Kibo Commerce, Dynamic Yield, and SiteSpect are Strong Performers; AB Tasty, Optimizely, and SAS are Contenders; and Kameleoon is a Challenger.

Digital Touchpoint Support And Innovative Use Of AI Are Key Differentiators

As fragmented, rules-based experience optimization technology becomes less effective, smooth multifunctional user interfaces, support for more digital touchpoints, and the use of AI will dictate which providers lead the pack. Vendors that support easy-to-use omnichannel campaigning, provide advanced profile data management, and deliver innovative optimization techniques position themselves for success.

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EOPs Support More Experiences With AI And Improved Data

Since our 2018 Forrester Wave™ evaluation of experience optimization platforms, customers have adopted even more new devices and form factors for engaging with brands.¹ Thus, improving connected experiences has become one of customer insights leaders' most important initiatives.² To meet this challenge, the EOP vendors we evaluated have embraced AI to deliver faster and more predictive analysis as well as drive more intelligent and automated experience optimization. Since our last evaluation, the EOP suppliers have delivered notable user interface improvements, a more integrated look and feel, and easier integration into existing and new data sources and touchpoints. As a result of these trends, EOP customers should look for platforms that:

- › **Support mature execution across a wide array of digital channels and touchpoints.** Modern experience optimization must support the entire lifecycle of customer engagement. EOP buyers must consider three key channel and touchpoint elements: 1) support for client- and server-side implementations for different types of touchpoints (e.g., browser and app); 2) capabilities for managing complex cross-channel campaigns; and 3) the ability to integrate with third-party systems (such as marketing, sales, and application delivery platforms) to execute experience optimization campaigns.
- › **Provide advanced data management and data use capabilities.** Modern testing, targeting, and recommendations programs rely on an acute understanding of customers and their engagement context to be effective. Hence, when selecting your EOP provider, you should consider the types and variety of data that the platform can use; the third-party sources of data that it can easily access; its ability to create, manage, and leverage use profiles; and how fast it can collect data and make it available to enrich experiences.
- › **Innovate and extend experience optimization techniques.** CI pros with established experience optimization programs should consider taking advantage of newer capabilities that EOP players offer. For example, some of the vendors we assessed are advancing the way their platforms support and control machine learning, while others allow customers to calculate predictive scores for elements like engagement risk and experience score.

Evaluation Summary

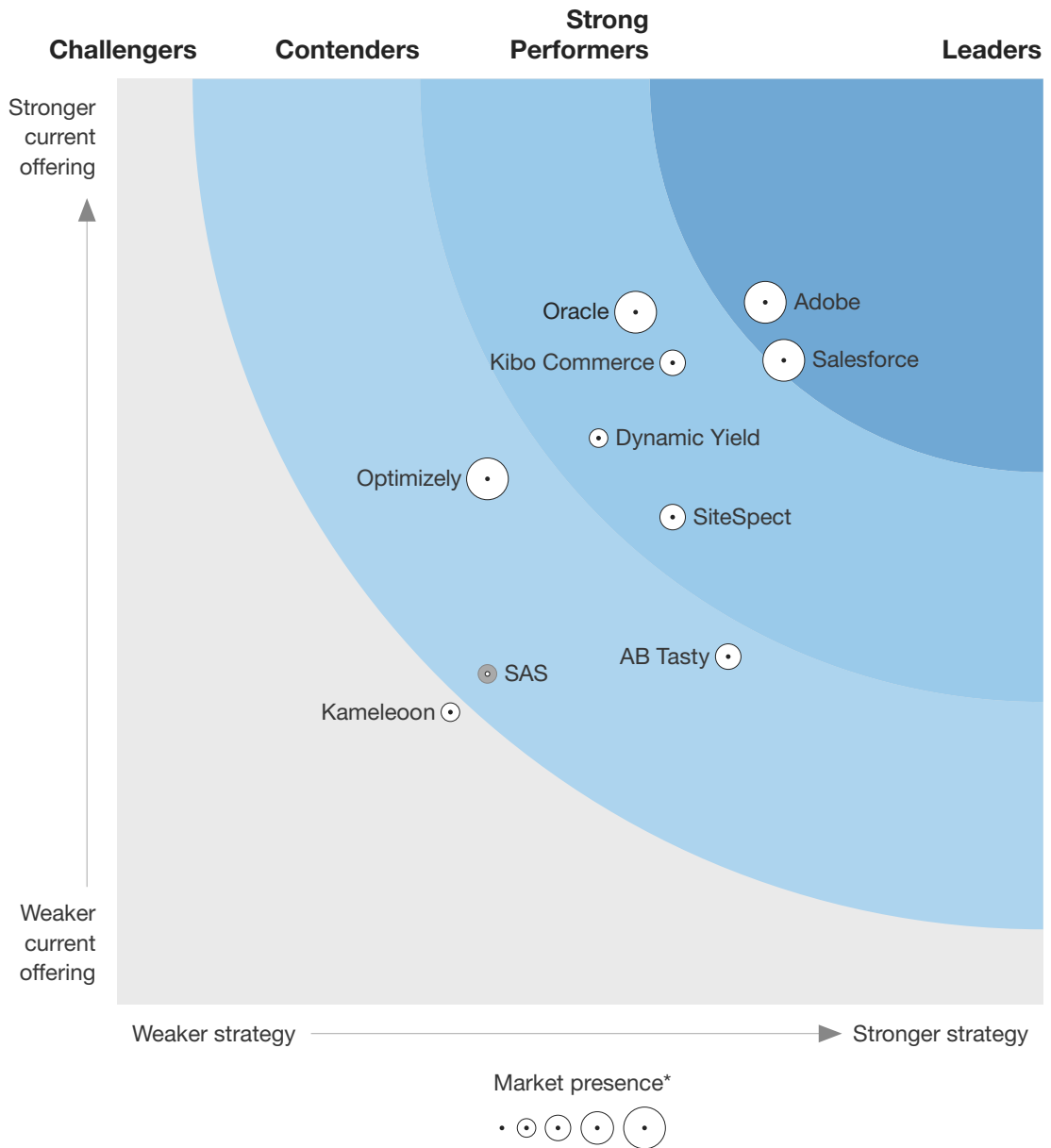
The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on [digital intelligence technologies](#).

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™: Experience Optimization Platforms, Q4 2020

THE FORRESTER WAVE™
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*A gray bubble indicates a nonparticipating vendor.

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FIGURE 2 Forrester Wave™: Experience Optimization Platforms Scorecard, Q4 2020

	Forrester's weighting	AB Tasty	Adobe	Dynamic Yield	Kameleoon	Kibo Commerce	Optimizely	Oracle	Salesforce	SAS*	SiteSpect
Current offering	50%	1.88	3.79	3.06	1.58	3.47	2.84	3.74	3.48	1.79	2.63
Online testing	40%	2.60	3.00	3.80	1.80	3.80	4.20	4.20	3.40	1.40	3.40
Behavioral targeting	20%	1.00	3.67	3.00	1.00	4.33	1.00	3.00	5.00	2.33	1.67
Recommendations	15%	1.00	4.60	3.00	1.00	3.80	1.00	3.00	4.20	2.20	1.40
Experience optimization technique innovation	5%	1.00	5.00	1.00	3.00	3.00	1.00	5.00	1.00	3.00	1.00
Platform experience	20%	2.20	4.60	2.20	1.80	1.80	3.80	3.80	2.20	1.40	3.40
Strategy	50%	3.30	3.50	2.60	1.80	3.00	2.00	2.80	3.60	2.00	3.00
Product vision	10%	1.00	3.00	3.00	1.00	3.00	1.00	5.00	5.00	1.00	3.00
Execution roadmap	20%	3.00	3.00	1.00	3.00	3.00	1.00	3.00	5.00	1.00	3.00
Performance	20%	3.00	3.00	3.00	3.00	3.00	1.00	1.00	3.00	1.00	3.00
Supporting services	25%	3.00	5.00	3.00	1.00	3.00	3.00	5.00	3.00	3.00	3.00
Partner ecosystem	25%	5.00	3.00	3.00	1.00	3.00	3.00	1.00	3.00	3.00	3.00
Market presence	0%	2.50	4.70	1.40	1.20	2.50	4.60	4.10	4.20	1.40	2.60
Annual revenue	30%	2.00	5.00	2.00	1.00	3.00	4.00	3.00	3.00	2.00	2.00
Number of enterprise customers	60%	3.00	5.00	1.00	1.00	2.00	5.00	5.00	5.00	1.00	3.00
Average deal size	10%	1.00	2.00	2.00	3.00	4.00	4.00	2.00	3.00	2.00	2.00

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

*Indicates a nonparticipating vendor

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Vendor Offerings

Forrester included 10 vendors in this assessment: AB Tasty, Adobe, Dynamic Yield, Kameleoon, Kibo Commerce, Optimizely, Oracle, Salesforce, SAS, and SiteSpect (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated
AB Tasty	AB Tasty Speedsail (client side), AB Tasty Flagship (server side)
Adobe	Adobe Target Premium
Dynamic Yield	Dynamic Yield
Kameleoon	Kameleoon Experiment Web, Kameleoon Experiment Full Stack, Kameleoon Segment, Kameleoon Recommend, Kameleoon Predict (AI personalization and behavioral targeting), Kameleoon Mail Personalization, Kameleoon Ad Personalization, Kameleoon Insights
Kibo Commerce	Monetate Personalization
Optimizely	Optimizely Web, Optimizely Personalization, Optimizely Recommendations, Optimizely Full Stack
Oracle	Oracle Maxymiser, Oracle Infinity Streams, Oracle Marketing Recommendations
Salesforce	Interaction Studio
SAS	Customer Intelligence 360
SiteSpect	SiteSpect A/B Testing and Optimization, SiteSpect Origin Experiments (server side), SiteSpect Personalization, SiteSpect Product Recommendations

Vendor Profiles

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

Leaders

- › **Adobe's full-stack capabilities show strength throughout, but others are catching up.** Adobe's Target Premium product delivers its strongest experience optimization capabilities.³ The Adobe Target Standard package lacks some of the autotargeting, internet-of-things (IoT) connectivity,

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recommendations, and enterprise governance capabilities of the premium version. The product is part of Adobe's Marketing Cloud, which in turn sits in Adobe's Experience Cloud portfolio. The vendor's vision for the product is to help marketers, developers, and data scientists jointly deliver true omnichannel experience optimization. Recent product innovations include integrations via platform services to make it easier to use the product with other Adobe experience offerings; increased use of AI for decisioning; and improved omnichannel capabilities. The SaaS-only deployment option includes all experience optimization capabilities.⁴

Adobe remains a dominant player in the experience optimization field. Target Premium offers consistently strong experience optimization features across the board, and its cross-technique and cross-channel workflow experience when creating campaigns is a standout. However, reference customer satisfaction in areas such as behavioral targeting and recommendations is not as high as in the past. Also, customers feel that Adobe should continue its product integration efforts. Customers looking for rich profiling capabilities should consider Target Premium, as should marketing and e-commerce business, operational, and developer teams from firms that already use many other Adobe Experience Cloud products.

- › **Salesforce's targeting and data use features shine, but its deployment options lag.** Salesforce's experience optimization platform, Interaction Studio, is an evolved version of the technology from its acquisition of Evergage. Interaction Studio is part of the Salesforce Marketing Cloud portfolio of products. The key elements of its experience optimization platform include a unified customer profile, behavioral tracking, AI/machine learning, and real-time experience delivery. New experience optimization innovations that Salesforce is proud of include the use of contextual bandit for continuous learning and the ability for users to create custom dimensions. The product comes with a SaaS-only deployment option, but all capabilities cannot be deployed independently.

Salesforce excels in behavioral targeting, and it delivers strong capabilities for managing and using data for all of the experience optimization techniques we reviewed. It also has strong recommendations capabilities and shows a convincing plan to execute on its product roadmap. However, the integration and flow of the user interface were less smooth than that provided by other vendors we assessed. Also, the extent of administrative and deployment options was not as impressive. Salesforce's Interaction Studio is a good fit for digital marketers, e-commerce professionals, and customer support teams.

Strong Performers

- › **Oracle impresses with AI but must accelerate the delivery of new features.** Oracle's experience optimization solution comprises three products: Oracle Maxymiser, Oracle Infinity Streams, and Oracle Marketing Recommendations. The vendor's vision for the platform is to help firms optimize engagement across the experience lifecycle by delivering real-time digital behaviors and automated decisioning. Oracle shines with real-time, high-fidelity, cross-channel data collection; the application

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of AI and machine learning to real-time data streams; and the ability to optimize experiences on the fly. The product can only be deployed via a SaaS option. Customers have the option of deploying its testing, targeting, and recommendations modules separately from each other.

Oracle is at its best in online testing, and it also has strong behavioral targeting and recommendations capabilities. Its innovative use of machine learning for creating predictive models, segment discovery, and other capabilities to help users make smarter optimization decisions is impressive. However, Oracle must improve its partner strategy and ecosystem. Also, many customers feel Oracle should be bolder and faster at rolling out new features. The product has a wide enterprise appeal and is a great fit for many types of users, including marketers, e-commerce professionals, product teams, and developers.

- › **Kibo Commerce has strong capabilities for e-commerce.** While Kibo has acquired several personalization technology assets, our evaluation focused on the Monetate Personalization product from its recent acquisition of Monetate. The vendor's vision for the product is to enable commerce professionals to design and launch hyperpersonalized experiences, tests, and recommendations in real time using a cross-channel data view of customer engagement. Kibo Monetate now offers innovations like predictive slotting audience discovery and an "AdLink" capability that enables targeted experiences for visitors arriving from paid media campaigns. Monetate Personalization deploys the solution via a SaaS option only, with all clients on the same shared platform.

Monetate Personalization has made significant progress since our last Forrester Wave evaluation; its testing, targeting, and recommendations are now on par with — or better than — its competitors' offerings. However, Kibo lags some of the top vendors in the product's ability to appeal beyond traditional e-commerce and marketing use cases as well as its campaign management capabilities. E-commerce pros — especially those from retail firms — will benefit from the product's audience exploration, segment discovery, and real-time contextual targeting capabilities.

- › **Dynamic Yield impresses with self-serviceability but lacks platform management.** The vendor delivers experience optimization capabilities via eight products: Dynamic Yield Customer Data Management, Dynamic Yield Personalization & Targeting, Dynamic Yield Content and Product Recommendations, Dynamic Yield Testing & Optimization, Dynamic Yield Behavioral Messaging, Dynamic Yield Triggering Engine, Dynamic Yield Rankings, and Dynamic Yield eXperience APIs. The vendor aims to help brands quickly deliver and test personalized, optimized, and synchronized digital customer experiences. Dynamic Yield's standout innovations include its APIs to enable testing across all channels, its application of deep learning techniques for product ranking, and its specialization in optimization analytics. SaaS is the product's only deployment option, but there are options to host scripts and assets on the customer's content delivery network (CDN). All experience optimization functionality is available via a single integrated platform and is accessible to all customers.

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Dynamic Yield has significantly strengthened its online testing capabilities since the last Forrester Wave evaluation, and its reference customers lauded its self-service capabilities. The vendor must improve its campaign management, platform administration, and technique innovation, however. Marketing, commerce, and product teams that wish to optimize and enhance e-commerce engagements should shortlist Dynamic Yield.

- › **SiteSpect delivers for DevOps teams, but it lags in data and recommendations.** SiteSpect delivers its experience optimization capabilities via four products: SiteSpect A/B Testing and Optimization, SiteSpect Origin Experiments, SiteSpect Personalization, and SiteSpect Product Recommendations. The vendor plans to develop this set of products into a purpose-built platform for testing, personalization, recommendations, and product optimization. SiteSpect's key innovations include its capabilities for real user monitoring and release rollouts. Deployment options include the cloud via SiteSpect's data centers, via a CDN, on-premises, and hybrid combinations of these options. Once the platform is deployed, all customers have access to all of its components.

SiteSpect wants to support best-of-breed experience optimization for business, operations, and technical enterprise functions, and its strong online testing capabilities reflect progress toward that ambition. Its many deployment options will impress technical and operations teams. But the platform's recommendations techniques and some of its data capabilities aren't as advanced as reference customers hoped for. SiteSpect is a good match for product developers and DevOps teams responsible for release testing, rollouts, and platform and infrastructure optimization, as well as for marketers and products teams with significant technical support.⁵

Contenders

- › **AB Tasty's client- and server-side options appeal, but it needs stronger targeting.** The AB Tasty Speedsail product is designed for marketing teams and provides client-side capabilities, while the server-side product, AB Tasty Flagship, is aimed at product and developer teams. With its products, AB Tasty aims to help its clients deliver an "Amazon-like" experience. The vendor started off providing testing, then invested in targeting and recommendation capabilities, and it has recently added server-side capabilities that feature management. AB Tasty offers SaaS deployment, and all experience capabilities are available to all customers once activated.

AB Tasty sets itself apart with its ability to execute tests across multiple types of touchpoints and the range of techniques it can employ. Further, the platform appeals to both business and technical users with its campaign management capabilities and by offering client-side and server-side versions. In contrast, AB Tasty's behavioral targeting and recommendations are weaker than its competitors' offerings. If you're interested in image optimization, built-in session recording, and feature optimization capabilities (all available in both the client- and server-side offerings), AB Tasty is a strong option.

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- › **Optimizely excels at enterprise-scale testing but not at personalization and data use.** Optimizely provides its experience optimization capabilities via four product offerings: Optimizely Web, Optimizely Personalization, Optimizely Recommendations, and Optimizely Full Stack. The vendor's ambition is to deliver experience optimization through experimentation and progressive delivery of digital products and thus help business and technical teams move faster.⁶ Recently, it has focused on building out feature optimization capabilities for developer teams. Optimizely's products boast analytics capabilities specializing in providing insights on experimentation. The only deployment option is SaaS. Customers can choose to implement testing as a standalone option. However, to use the targeting or recommendations modules, the testing module must also be deployed.

Optimizely's platform integration makes it appealing for large enterprise deployments, and it provides strong capabilities for executing testing across different channels and using different testing techniques. On the downside, Optimizely's targeting, recommendations, and data capabilities lag behind those of the other solutions we evaluated. Enterprises looking to implement large, cross-functional, high-volume experimentation programs will find the platform's enterprise-grade testing capabilities attractive.

- › **SAS's capabilities are enterprise grade, but its new vision has a marketing-only focus.** SAS's experience optimization platform is its SAS Customer Intelligence 360 offering, which consists of seven components: SAS 360 Plan; SAS 360 Discover; SAS 360 Engage: Digital (this module contains the bulk of SAS's experience optimization capabilities); SAS 360 Engage: Direct; SAS 360 Engage: Email; SAS 360 Engage: Optimize; and SAS 360 Match. The vendor embeds SAS Customer Intelligence 360 in marketing analytics and marketing optimization practices. SAS is most proud of its customer journey optimization capabilities that use reinforcement learning, and it offers them via a SaaS deployment only.

SAS's experience optimization platform shines in data management and the use of data for testing, targeting, and recommendations. The offering appeals to different user types across the enterprise and is relevant to many different verticals and use cases. However, SAS recently shifted its focus away from supporting a broad set of enterprise users and use cases. Instead, the vendor touts its roadmap to becoming an "application purpose built for hybrid marketing" (meaning digital and traditional direct marketing). Given this shift, the product will appeal mostly to digital marketers from all types of industries. SAS declined to participate in the full Forrester Wave evaluation process.

Challengers

- › **Kameleoon's deployment options impress, but it lags the Leaders in most areas.** Kameleoon's experience optimization capabilities are spread across eight products: Kameleoon Experiment Web, Kameleoon Experiment Full Stack, Kameleoon Segment, Kameleoon Recommend, Kameleoon Predict, Kameleoon Mail Personalization, Kameleoon Ad Personalization, and Kameleoon Insights. The vendor employs this multiple-product strategy to serve the experience optimization needs of clients at many maturity levels. Kameleoon has focused its product

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innovation efforts on providing real-time propensity scoring of visitors, flicker-free performance, and flexible consent management. The vendor offers an impressive array of deployment options, including SaaS and full on-premises. Customers have the flexibility to deploy some or all of the individual components for testing, targeting, and recommendations.

Kameleoon's ability to execute on its ambitious product roadmap and the strong performance of its experience optimization business are noteworthy for a new entrant into our EOP evaluation. And the products' multiple deployment options are a boon for enterprise customers. However, Kameleoon must continue to invest in strengthening and building out its testing, targeting, recommendations, and data capabilities. With its real-time browser-based predictions and performance- and scalability- oriented architecture, Kameleoon's solution is a good fit for the healthcare, finance, and e-commerce industries.

Evaluation Overview

We evaluated vendors against 22 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 are online testing, behavioral targeting, recommendations, experience optimization technique innovation, and platform experience.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, performance, supporting services, and partner ecosystem.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's annual revenue, number of enterprise customers, and average deal size.

Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: AB Tasty, Adobe, Dynamic Yield, Kameleoon, Kibo Commerce, Optimizely, Oracle, Salesforce, SAS, and SiteSpect. Each of these vendors has:

- › **A mature EOP product strategy.** The vendor offers a software technology platform with best-of-breed online testing capabilities as well as advanced capabilities for behavioral targeting and product/content recommendations.
- › **A successful EOP business.** The vendor's annual revenues from its EOP business are at least \$15 million. Also, the vendor has shown steady growth of adoption of its experience optimization products and associated revenues.

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- › **Market visibility in the experience optimization space.** Forrester clients often discuss the vendor's experience optimization products through inquiries; alternatively, the vendor may, in Forrester's judgment, warrant inclusion or exclusion in this evaluation because of specific approaches the vendor has taken relative to experience optimization market trends.

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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.

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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.

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 August 28, 2020, 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 Forrester Wave™: Experience Optimization Platforms, Q2 2018](#)."
- ² Source: Forrester Analytics Business Technographics® Priorities And Journey Survey, 2020.
- ³ Adobe packages a premium version called Adobe Target Premium, and a standard version called Adobe Target Standard. This evaluation evaluated the premium version only.
- ⁴ SaaS: software as a service.
- ⁵ DevOps: development plus operations.
- ⁶ On October 21, 2020, Episerver completed its acquisition of Optimizely. To ensure a fair and efficient evaluation process, Forrester presents each company (or product) as it is publicly represented at the time of the Forrester Wave kickoff (the official start of the evaluation period), so this acquisition was not factored into the evaluation. Source: "Episerver Completes Acquisition of Optimizely, Creating the Industry's Most Advanced Digital Experience Platform," Optimizely press release, October 21, 2020 (<https://www.optimizely.com/optimizely-acquisition-by-episerver-complete/>).

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