

Critical Capabilities for Mobile Marketing Platforms

Published 21 October 2019 - ID G00377621 - 42 min read

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Mobile marketing platforms help marketers select and engage their target customers in real time, across various mobile devices and triggered by events. Marketing leaders need to evaluate and select the right MMPs to help them acquire, engage and retain their mobile customers.

Overview

Key Findings

- The mobile marketing platform market has two distinct categories: purpose-built mobile marketing solutions, which integrate mobile capabilities into the broader marketing technology stack, and multichannel marketing hubs, which offer mobile capabilities as extensions of their core offerings.
- PBMs take a mobile-centric approach to their solutions. A diversity of analytical capabilities is core to their feature set, with a focus on features that measure behaviors and actions specific to mobile users.
- MMH vendors approach mobile marketing as an extension of multichannel experiences, and typically excel at segmentation and journey-building applications.
- As marketers seek to engage their customers on their mobile devices in real time, advanced analytics capabilities are key to making those efforts successful and compelling.

Recommendations

Marketing leaders responsible for mobile marketing should:

- Assess mobile marketing platforms' current capabilities against their requirements. Base this evaluation on each vendor's current offering and near-term plans to support initiatives critical to business growth, such as real-time and event-triggered campaigns and support for more-advanced mobile messaging options, such as Facebook Messenger.
- Identify and prioritize the capability gaps that an MMP can fill using Gartner's Marketing Maturity Assessment. Then, gauge the business value of a PBM marketing platform versus a



- Collaborate with colleagues in sales, IT and customer service to ensure cross-functional platform alignment to evaluate the time, cost and complexity of integrating MMP with internal systems. Consider the need for system integrators and mobile point solutions to support lagging MMP capabilities, such as analytics and reporting.

What You Need to Know

This Critical Capabilities research is a companion to the 2019 “Magic Quadrant for Mobile Marketing Platforms.” This evaluation reflects functional product capabilities as of February 2019.

Although marketers use an array of software solutions to support their organizations’ multichannel marketing goals, mobile marketing platforms (MMP) stand out as a keystone instrument. Fifty-nine percent of the marketers surveyed in Gartner’s “Multichannel Marketing Survey 2019: Marketers Reorient Programs Around Customer Insights” reported that they use their MMPs to support multichannel marketing objectives.

When asked how they’re using their MMP, marketers in the same survey said they use this tool to:

- Unify customer profiles (44%)
- Support prediction and decision making (41%)
- Segment audiences based on defined rules (39%)

Although most marketers understand mobile’s central role in supporting multichannel efforts, their approach doesn’t always focus on mobile as the primary channel. Gartner identifies two ends of the mobile marketing strategy spectrum (see “2 Types of Mobile Marketers: Which One Are You?”):

- **Mobile-centric:** Mobile marketers who adopt this strategy exploit the distinct capabilities of mobile devices and networks, such as the camera, accelerometer, Bluetooth radio and real-time location. This enables them to engage their customers and prospects in customized experiences that are unavailable using techniques derived from the desktop. They include a fixed allocation in their annual marketing budget to fund ongoing mobile innovation efforts.
- **Mobile-extender:** In contrast, this mobile marketing strategy’s primary mobile engagements are in the form of adapted versions of desktop interactions – via web presence, advertising and search. Mobile does not enable a unique form of connection to customers and prospects; rather, it extends their existing connections to a different form factor. Companies employing this strategy primarily allocate marketing dollars to mobile as a portion of individual campaigns.



Mobile marketing platform vendors vary in their approach, too. Each MMP helps marketers deploy mobile tactics through one of two platform-types:

- **A multichannel marketing hub (MMH) with native mobile marketing capabilities:** Offers mobile marketing as part of a broader marketing cloud. Vendors in this category, such as Adobe or Salesforce, deliver a range of engagement and analytics capabilities for mobile web and mobile applications. They offer native mobile marketing capabilities, but may also partner with third parties to support capabilities around delivery, monetization and measurement.
- **A purpose-built mobile (PBM) marketing platform:** Enables direct-marketing engagement capabilities, including SMS campaign design, delivery and reporting; push notification and in-app messaging; and mobile wallet integration. In addition, these solutions can link to existing marketing platforms, such as email and social marketing.

Mobile marketers show some overlap in the use of their MMH and PBM marketing platform to achieve mobile marketing results. According to the Multichannel Marketing Survey 2019, 33% of marketers surveyed report using the two platform types in tandem, with only 26% and 18% reporting using exclusively a PBM or an MMH solution, respectively. (See “Survey Analysis: Multichannel Marketing Hub, Mobile Marketing Platform or Both?”)

MMP Vendors Expand Their Offerings

Mobile is quickly expanding from a top-of-funnel activity to a legitimate transaction point. According to Gartner, a significant portion of U.S. consumers (38%) report that, for many categories of products, their phone is their first choice when shopping and buying (see “Retailers Must Elevate Mobile as a Priority”). MMP vendors are addressing the rapid uptick in mobile engagement demands by offering capabilities such as:

- **Triggered notifications through a variety of channels.** Event-triggered/real-time campaigns ranked among the emerging technologies that will have the greatest impact on marketing activities during the next five years. This is according to marketers surveyed in Gartner’s “Marketing Technology Survey 2018: Martech Adoption Surges as Brands Pursue Personalization, Measurement and Advertising Accountability.”

Most mobile platforms now feature the ability to trigger push, as well as send SMS notifications based on individual events, such as app downloads, user registration or subscription renewal. Channels such as SMS and push are standard; most vendors are aggressively adding new channels, such as WhatsApp, Rich Communication Services (RCS; also known as Rich Business Messaging [RBM]) and Apple Business Chat.

- **Enhanced data protection modules.** As brands rigorously scrutinize their digital ad

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customer data privacy and transparency and legal compliance. (See “Use Personification to Balance Personalized Marketing With Privacy and GDPR.”)

- **Stronger integrations and third-party partnerships.** MMP vendors are forging partnerships to help brands maximize mobile investments. Some have allied with social platforms, such as Facebook, to let marketers trigger in-app experiences from their social ads. Others are working on privacy-compliant mobile data exchanges between their platforms and third-party analytics providers, location apps and data warehouses to help marketers maintain compliance with data protection regulations.
- **AI-driven analytics capabilities.** Mobile platforms are using analytics capabilities powered by AI to give marketers insights into customer behaviors and preferences at massive scale. They serve up insights enabling more-effective audience segmentation and personalized content, and help marketers leverage behavioral data from mobile search, social media interactions and purchase histories.

Marketing leaders looking for MMPs need to evaluate their mobile marketing strategies – mobile-centric or mobile-extender – and find a vendor that matches their needs. They should also explore the vendors’ ability to:

- Keep pace with mobile engagement innovations and advanced/emerging mobile marketing techniques. Forty-six percent of client references cited “product roadmap” and “future vision” as top reasons for selecting a vendor.
- Provide robust in-built mobile marketing analytics that reflect all the available mobile channels.
- Offer strong connectors or APIs that can feed mobile data into existing digital marketing analytics and larger data ecosystems – for example, via a customer data platform (CDP), data management platform or CRM solution.

As MMH solutions look to add mobile-centric capabilities, and as purpose-built solutions seek deeper inroads into the marketing organization, expect increased vendor consolidation. Airship’s acquisition of Accengage in 2018 exemplifies consolidation in the PBM category. As demand for strong mobile and multimodal engagement capabilities grows to keep pace with consumer expectations, so will the complexity for mobile marketers. This means choosing an MMP is more important than the average vendor selection: it’s a critical strategic decision for the entire marketing team.

Choosing an MMP is more important than the average vendor selection:

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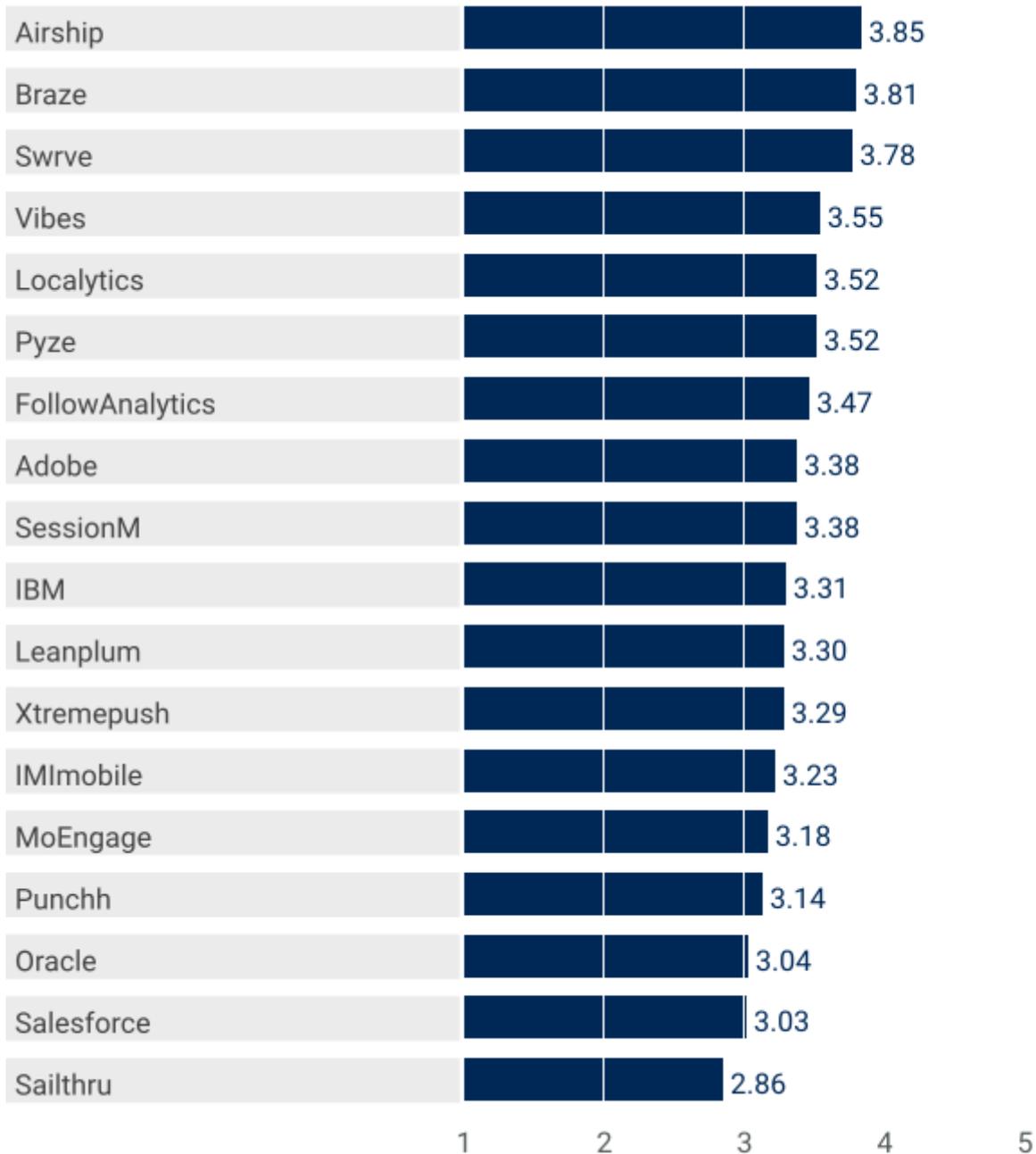


Analysis

Critical Capabilities Use-Case Graphics

Figure 1. Vendors' Product Scores for the Acquisition Use Case

Product or Service Scores for Acquisition



As of 16 October 2019

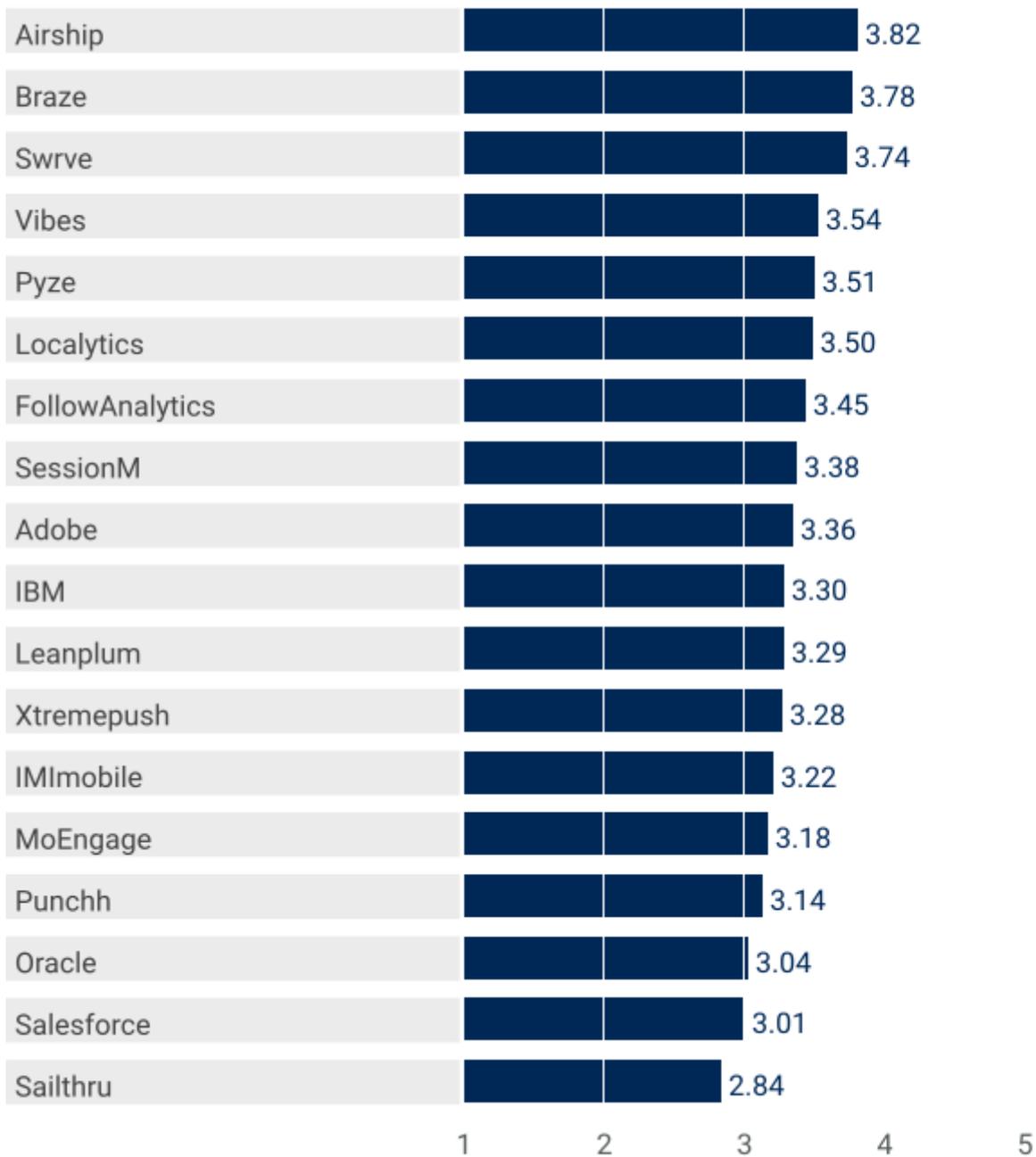
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Source: Gartner (October 2019)

Figure 2. Vendors' Product Scores for the Engagement Use Case



Product or Service Scores for Engagement



As of 16 October 2019

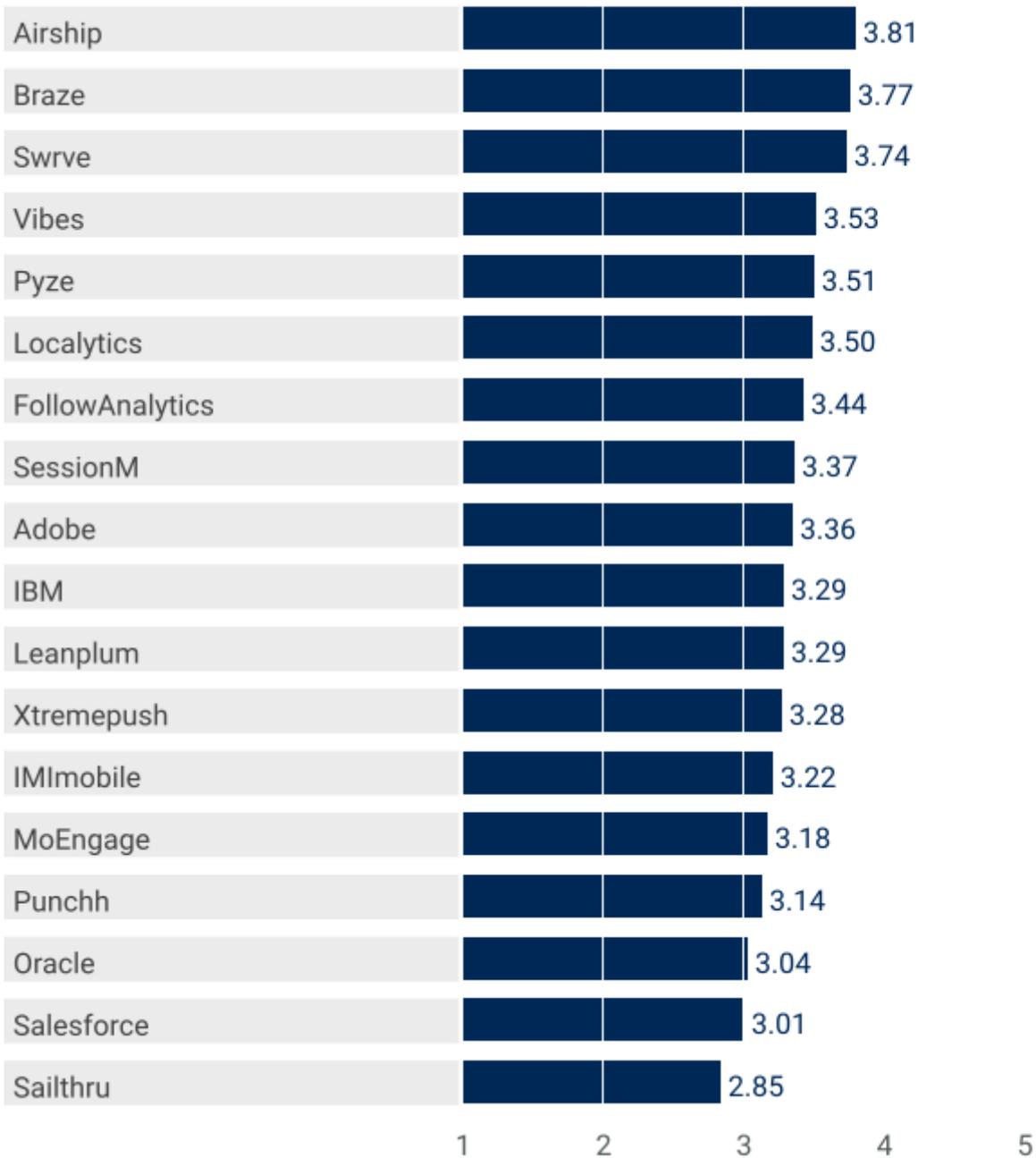
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Figure 3. Vendors' Product Scores for the Retention Use Case



Product or Service Scores for Retention



As of 16 October 2019

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Vendors

Adobe

Adobe Experience Cloud supports all mobile marketing use cases. Audience segmentation is a core strength, supported by the wide range of analytics capabilities in Adobe Analytics with Mobile Marketing Add-On.

Adobe earned Good scores across all critical capabilities, with particular strength in campaign

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Although still overall Good, clients expressed a lower level of overall satisfaction with the platform's ability to support location-based offers and engagements, in contrast with clients of competing vendors.

In 2018, Adobe added mobile-specific enhancements to its Experience Cloud, including testing and campaign optimization, which enabled the company to meet the criteria for Gartner's Magic Quadrant for Mobile Marketing Platforms. The company also added GDPR support and improved the performance of its push notification service in Adobe Campaign. Its 2019 focus rests on its artificial intelligence (AI) and machine learning (ML) foundation to enhance its send time optimization and incorporate macro- and micro-location data.

Marketers with investments in Adobe solutions seeking strong analytics capabilities and a breadth of mobile marketing functionalities should consider Adobe.

Airship

Airship's Customer Engagement Platform supports all mobile marketing use cases, exhibiting particular strengths in the engagement and retention use cases.

The platform scored Excellent in audience segmentation, event-triggered engagements and real-time offers, ranking highest in these three capabilities among all vendors in this research. Airship also scored Good for its campaign workflow and location-based offers/engagements capabilities.

Airship's analytics capability scored Good, trailing only a few other vendors. Client references cited primarily using Airship's analytics for mobile apps and location-based marketing, while turning to mobile web analytics from other providers. Airship has prebuilt connectors for a variety of analytics, attribution and CDP vendors.

In 2018, Airship acquired Accengage, a Paris-based mobile marketing platform with experience in developing algorithms for determining the optimal balance of message frequency and relevant content – areas that help with engagement and retention. As of February 2019, the company plans to extend Accengage's integrations with consumer messaging apps such as WhatsApp and Facebook Messenger. Airship also plans to refine its analytics console to enable nontechnical marketers to more easily access cross-channel engagement data.

B2C marketers looking to activate cross-channel messaging, especially in retail, media, financial services, and travel and hospitality, should consider Airship.

Braze

Braze supports all mobile marketing use cases. Campaign workflow is a core strength, as is a foundational data architecture designed to support real-time marketing.

Braze scored Excellent for its audience segmentation and campaign workflow capabilities, with

Clients rated Braze's support for the acquisition use case slightly below the average across all participating vendors. Clients expressed a higher level of satisfaction for retention and engagement use cases.

In 2018, Braze strengthened its leading campaign orchestration capabilities, making it easier for marketers to reuse content across a range of channels, including email, web and new proprietary channels, such as cards sent to inboxes across web and mobile platforms. The company also launched its Braze Alloys partner program, which includes several analytics partnerships and bidirectional data sync with companies such as Mixpanel and Snowflake. In February 2019, the company reported that it is focused on expanding its range of channels to include WhatsApp and mobile wallets. Braze is also leveraging investments in ML to bring automation to efforts such as segment creation and channel optimization.

B2C marketers looking for an MMP focused on optimizing real-time experiences should consider Braze.

FollowAnalytics

FollowAnalytics supports all mobile marketing use cases, exemplifying particular strength in its ability to enable marketers to create event-triggered engagements.

The platform scored Good across all mobile marketing capabilities, with location-based engagements scoring above average, compared with other vendors included in this research.

FollowAnalytics scored Good for its analytics capability, and its audience segmentation capability scored at just about the average across all other vendors.

In 2018, the company extended its AI/ML capabilities throughout the platform. In early 2019, it introduced a native-app development capability to the platform, with the strategic intent to deliver an end-to-end mobile marketing solution. FollowAnalytics reported in February 2019 that its development plan would focus on refining its use of AI and ML to deliver "explainable AI." Gartner defines this as a set of capabilities that describes a model, highlights its strengths and weaknesses, predicts its likely behavior, and identifies any potential biases.

Marketers looking for an MMP that integrates mobile capabilities with AI functionality should consider FollowAnalytics.

IBM

IBM's Watson Campaign Automation platform supports all mobile marketing use cases and is known for its core messaging functionality.

The company earned a Good score for campaign workflow, and customer references called out the platform's ease of use for its mobile marketing capabilities as an extension of its core Watson Campaign Automation MMH.

Critical Capabilities research.

Since 2018, IBM made a number of improvements to its mobile app software development kit (SDK), including better push-notification performance measures and improved content-creation for in-app messaging. IBM's plans for 2019, as reported in February, includes improving content creation capabilities for all messaging channels, delivering support for web push notifications and expanding support for deep linking. The company also plans to improve on its Device Location Awareness capabilities, including a location streaming service with location and contact personalization.

Marketers that have already invested in Watson for Marketing platforms should consider IBM.

In April 2019, IBM announced the sale of its marketing technologies to private equity firm Centerbridge Partners to create a new company named Acoustic. This evaluation was based on the mobile marketing capabilities of the IBM Watson Campaign Automation platform, as of February 2019.

IMImobile

IMIcampaign, which is IMImobile's MMP, supports all mobile marketing use cases. The platform stands out for its strong audience segmentation functionality.

IMIcampaign scored Good in campaign workflow, event-triggered engagements and real-time offers. However, these scores came out slightly below average across vendors in this research.

Analytics, which scored Good, ranked as the platform's lowest-scoring capability. Although IMImobile's critical capability scores improved across the board since 2018's assessment, customer references labeled the platform's overall performance, scalability and/or throughput as below average, when compared with other vendors included in this research.

In 2018, IMImobile added and deployed RCS/RBM capabilities to IMIcampaign and added to its RCS/RBM skills with the acquisition of 3CInteractive in mid-2019. It also added mobile wallet support, and it has expanded its API set to deepen integration capabilities. The company improved IMIcampaign's native email capabilities by purchasing two email service providers. As the company reported in February 2019, IMImobile plans to refine the platform's ability to deliver closed-loop marketing offers by enabling the delivery of personalized offers with a higher degree of automation.

Marketers focused on retention and upselling large consumer audiences that frequently access and engage with their brands should consider IMImobile.

Leanplum

Leanplum supports all mobile marketing use cases. The Leanplum platform is known for its A/B and multivariate testing, which remain core strengths.



for those focused on acquisition or retention.

Leanplum scored Good in analytics, just slightly above the average among all vendors. Although the platform includes native support for predictive and mobile web analytics, no client references reported that they made use of these capabilities.

In 2018, Leanplum enhanced its Campaign Composer to support complex user flows by incorporating campaign journey analytics and new orchestration capabilities. The company invested in increasing its scale in support of large enterprise clients. Leanplum plans to maintain this focus through 2019 as its large clients demand greater volume of interactions with customers. Leanplum is also focused on integrating ML into its platform to further automate message delivery and audience creation (e.g., crafting segments based on predicted lifetime customer value).

Marketers looking to prioritize mobile experiences in their native and expanded partnership integrations should consider Leanplum.

Localytics

Localytics supports all mobile marketing use cases. The company has a core strength in enabling real-time, event-based engagement campaigns.

Localytics received Good scores on all critical capabilities. The company ranked above average for event-triggered engagements and real-time offers.

Client references reported a significantly lower level of satisfaction with Localytics' support for location-based offers and engagements than did clients of other vendors. Although Localytics supports SMS and browser-based push messaging, no client references reported using these capabilities.

In 2018, Localytics shifted its platform's orientation from its historical app-centric view of the customer to a user-oriented view, easing clients' ability to engage with customers across channels and across apps. The company also introduced a multistep campaign creation capability that increases marketers' ability to personalize their campaigns based on user behavior. As the company reported in February 2019, Localytics plans to provide better tools to optimize campaign execution. This will include the ability to optimize engagement based on send time, frequency of interaction and channel preference.

B2C marketers looking to enhance the mobile engagement capabilities of their existing marketing technology stack should consider Localytics.

MoEngage

MoEngage supports all mobile marketing use cases. The company has made significant strides in broadening its feature set to support mobile engagement beyond its app-centric origins.



messaging – in particular, push, in-app and SMS.

Scores for MoEngage’s event-triggered, real-time and location-based support average lower, compared with other vendors in this research. Client references report a higher level of satisfaction with the platform’s ability to support engagement and retention oriented campaigns, versus those focused on acquisition.

In 2018, MoEngage focused on helping transform analytics insights into direct engagement via its Actionable Insights add-on product. Based on market feedback on challenges with push messaging to certain Android devices, the company launched its Push Amplification product, which claims to improve deliverability by as much as 30%. MoEngage’s roadmap, reported in February 2019, includes plans to exploit machine learning to reduce the time from analytics insights to targeted execution and monitor campaign performance to improve efficacy.

B2C marketers looking for an MMP as a complete marketing automation solution should consider MoEngage.

Oracle

Oracle Marketing Cloud supports B2B (via Oracle Eloqua) and B2C (via Oracle Responsys) mobile marketing use cases. Oracle’s audience segmentation is its best-scoring critical capability; however, it came in below average for all vendors included in this research.

Oracle’s mobile marketing capabilities are strictly extensions of its Oracle Marketing Cloud MMH. The company scored Good in campaign workflow, real-time and event-triggered capabilities, but came in slightly below the average for all vendors in these capabilities.

Location-based offers/engagements – the company’s lowest scoring critical capability—achieved a Fair rating, slightly below the average for all other vendors.

In 2018, Oracle made a pair of key enhancements to its mobile marketing offering. First, the company improved its customer self-service options by introducing SMS Public Aggregator Network (SPAN). This capability enables mobile marketers to select SMS aggregators based on such variables as the region of the world a campaign will be run, routing type (inbound or outbound messages), and pricing. Second, the company delivered send-time optimization for push notifications, enabling marketers to target push messages based on the time of day that the user’s history indicates they are most likely to respond.

Marketers with heavy investments in Oracle marketing and technology infrastructure looking for a solid MMP to extend their capabilities should consider Oracle.

Oracle did not respond to requests for supplemental information. Therefore, Gartner analysis is based on other credible sources, including public information and discussions with Gartner clients that use Oracle products/solutions.



Punchh supports all mobile marketing use cases. The company's ability to integrate with a wide variety of point of sale (POS) solutions provides brands with physical retail outlets the ability to craft mobile experiences that bridge the physical and digital.

Punchh received Good scores on nearly all critical capabilities. Clients reported a high level of satisfaction with the platform's capacity to integrate mobile wallet offerings into their marketing programs.

Punchh's analytics capabilities are Good, but scored at the lower end of this range. The platform offers analytics; however, only a small percentage of clients reported that they use this feature. Overall satisfaction with the platform's support for retention-oriented campaigns was below the average across vendors in this evaluation.

In 2018, Punchh introduced Punchh Mobile Wallet, which allows brands to deliver loyalty rewards and redemption to Apple Pay users in a single tap. In its February 2019 roadmap, the company reported plans to introduce an AI-powered suite aimed at improving and automating marketers' ability to personalize campaigns based on such attributes, such as lifetime customer value and product affinity. Punchh also plans to improve its out-of-the-box analytics by extending the breadth of its dashboard to aid strategic planning, what-if analysis, monitoring and alerts.

B2C marketers in need of enhanced loyalty management capabilities that are looking for an MMP focused on customer growth should consider Punchh.

Pyze

Pyze's Growth Intelligence Platform supports all mobile marketing use cases, with audience segmentation a particular strength.

Campaign workflow scored Good, and its real-time offers and event-triggered capabilities ranked around the average across all vendors in this research. Customer references were particularly pleased with the platform's ability to drive cross-channel engagements.

Although Pyze's lowest-scored capability was analytics, it still managed a Good rating, coming in behind a couple of peers.

Since 2018, Pyze has containerized its platform, enabling mobile marketing teams to purchase separate components of the platform, and deploy these components within complex multitouch environments. The company also added an AI-enhanced visual journey builder for creating multichannel, multistep journeys with automated recommendations for a user's preferred channel. Pyze's future plans as stated in February 2019 include adding its Next Generation Data platform to improve marketers' ability to import and export data from any customer data from any source.

Marketers with multiple apps and websites, as well as those with data aggregated from

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Sailthru

Sailthru's Mobile Manager – the mobile marketing module of the company's Customer Retention Cloud – supports all mobile marketing use cases. Sailthru's MMH is predominantly focused on email and web engagement channels, with mobile playing more of a supporting role.

Although audience segmentation – which scored Good – was the platform's highest ranked capability, it scored the lowest among all other vendors in this research.

Mobile Manager earned Fair scores across all other critical capabilities, significantly trailing most vendors in nearly every capability. Sailthru's customer references praised the platform's ease of use, but noted its lack of more-sophisticated A/B testing capabilities.

Since 2018, the company bolstered Mobile Manager's rich push notification capabilities and integrated deep-linking support to its Lifecycle Optimizer, the company's customer journey messaging-flow tool. Sailthru also enhanced user-behavior tracking to strengthen its message optimization capability. As the company stated in February 2019, Sailthru plans to enhance a number of its mobile analytics capabilities, particularly in exposing mobile metrics in Lifecycle Optimizer and refining its push-messaging analytics. Sailthru also seeks improvements in its ability to port mobile data gathered by the platform to a customer's owned data warehouses.

Marketers looking for an MMH focused on refining and extending email marketing and website conversions strategies – and looking for solid mobile extensions for those channels – should consider Sailthru.

Salesforce

Salesforce Marketing Cloud Mobile Studio, which comes with Journey Builder for orchestration, supports all mobile marketing use cases. Salesforce has well-defined integration points in its Marketing Cloud product. This allows marketers to rely on purpose-built MMPs as extensions that deliver advanced capabilities beyond those of Mobile Studio.

Salesforce earned Good scores for the majority of critical capabilities. Its greatest strength resides in enabling marketers to segment and create audiences.

Salesforce's analytics and support for location-based engagements scored Fair. Client reference satisfaction with the platform's ability to support acquisition-based campaigns was among the lowest across all vendors.

In 2018, Salesforce improved marketers' ability to measure customer interactions across channels by linking to Google Analytics 360. In its February 2019 roadmap, the company reported plans to further leverage its Einstein AI to provide bolstered capabilities, such as providing engagement scoring as an input and optimizing message send time in Journey Builder. Salesforce also plans to enhance its A/B and multivariate testing capabilities.

Salesforce.

SessionM

SessionM supports all mobile marketing use cases. The platform is particularly adept at supporting audience segmentation, a strength that is well suited for incentive-driven mobile messaging techniques, as part of SessionM's historically loyalty-focused platform.

The platform received Good scores across all critical capabilities, with above-average ratings for event-triggered engagements and real-time offers.

SessionM's lowest-ranked capability was analytics, where it garnered a Good rating. Its campaign workflow slightly trailed the average for all vendors.

Since 2018, SessionM has improved the platform's ability to continually monitor mobile key performance indicators (KPIs). Further improvements in the platform's product recommendation, based on a customer's historical purchase information, redemptions and other user event data, give marketers a standing snapshot of customers' behaviors and habits. As of February 2019, SessionM reported plans to upgrade the platform in two specific areas, starting with updates to its offer and campaign user management capabilities. Second, the company plans to deploy ML capabilities designed to track all mobile marketing activities and continually test and optimize campaigns.

Marketers responsible for mobile marketing with companies that place a heavy emphasis on loyalty programs and strategies, as well as those who want to extend their engagements to core mobile marketing channels, should consider SessionM.

Swrve

Swrve supports all mobile marketing use cases. Since last year's Critical Capabilities research, the company has significantly increased its ability to help marketers understand customers' behavior across touchpoints, including emerging channels, such as over-the-top (OTT) set-top boxes.

Swrve scored Excellent for its audience segmentation and campaign workflow capabilities, with clients praising the platform's support for engagement campaigns across app and web. Swrve earned Good scores across all other categories.

As with other vendors, client references report relying on Swrve primarily to support engagement- and retention-oriented campaigns. Their overall satisfaction with these use cases, as well as with acquisition, was slightly below the average across all vendors.

In 2018, Swrve refined its cross-channel capabilities by adding cross-channel and cross-device identity aliasing. The company also extended its use of AI to enhance the platform's segmentation and personalization capabilities. In Swrve's February 2019 roadmap, the



improving marketers' ability to automate campaign creation and execution, using predictive models.

Marketers looking to optimize their real-time mobile performance should consider Swrve.

Vibes

Vibes supports all mobile marketing use cases. With its deep roots in mobile messaging, the company excels at enabling its customers to natively exploit the rich diversity of mobile messaging options, from SMS and mobile wallet to mobile messaging apps, such as Facebook Messenger.

Vibes scored Excellent for its event-triggered engagement capability, with client references reporting that they were completely satisfied with this aspect of the platform's solution. Vibes earned Good scores across all other categories.

Vibes lags in analytics, scoring Good, although at the lower end of this range. No client references reported using the platform's predictive or location-based analytics capabilities, although it's possible that these clients had not upgraded to the company's Advanced Analytics product.

In 2018, the company introduced Vibes Advanced Analytics, improving the platform's native analytics capability and giving customers greater flexibility and customization in reporting. Vibes also released a data integration framework that facilitates the exchange of data between the Vibes platform and other client systems. As of its February 2019 roadmap, the company plans to add support for new messaging channels, including Apple Business Chat and WhatsApp. Vibes also plans to introduce a Conversational Builder, which uses AI and natural language processing to help marketers craft more-organic, automated conversational exchanges with customers.

B2C marketers seeking to deliver real-time mobile engagement or improve the mobile performance of their existing MMH should consider Vibes.

Xtremepush

Xtremepush's Core Platform, a purpose-built mobile marketing platform, supports all mobile marketing use cases. The platform stands out for its robust audience segmentation functionality.

Xtremepush earned Good scores for its campaign workflow and audience segmentation capabilities, along with its ability to drive event-triggered engagements.

The platform scored Good for its analytics capability, and while its real-time offers capability also scored Good, the company's rating trailed the leaders in this research.

In 2018, Xtremepush enhanced its real-time capability by enabling the platform to take in event



programmatically) to provide their end-user customers access to the data collected about them. Customers can then use this access to rectify incorrect information, restrict collection of some data and preserve their so-called “right to be forgotten.” Through two acquisitions in 2018, the company also added native email support to the platform. In its February 2019 roadmap, the company reported plans to improve its support for real-time engagements including the ability for customers to track and make every event in their marketing ecosystem available in real-time with one simple integration.

Marketers with the internal technical resources to manage digital marketing automation who are looking to advance their automation capabilities in the consumer products and financial services industries should consider Xtremepush.

Context

This research is Gartner’s second Critical Capabilities for Mobile Marketing Platforms. It reflects the rapid maturation and growth of this product category, as well as marketing leaders’ increasing reliance on mobile marketing techniques for business advantage.

With the smartphone now taking the lion’s share of global consumers’ time spent on digital devices, ¹ marketers’ draw toward mobile as a marketing channel is driven by consumers’ increasing reliance on mobile devices.

Smartphones now act as hubs for navigating their daily personal, work and social lives. Gartner found that consumers with a strong mobile preference (18%) are twice as likely to have at least a six-figure income than those who opt for a nonmobile retail experience (9%). ²

As younger generations continue to lead the way in mobile adoption and use, ³ brands are tuning their marketing investments toward mobile accordingly. Gartner’s “CMO Spend Survey 2018-2019: Marketers Proceed Into Uncharted Waters With Confidence” found that a full 77% of CMOs surveyed reported plans to increase their mobile marketing budgets through 2020, ranking highest among 15 marketing capabilities measured. According to the Interactive Advertisement Bureau (IAB), advertising revenue delivered on mobile devices reached nearly \$70 billion in FY18, representing a 40% jump year-over-year from 2017’s revenue of \$50 billion. This market reality places a premium on MMPs that allow marketers to deliver a compelling offer or engagement, because it’s at the right time and relevant to the user’s context.

This Critical Capabilities research assesses mobile marketing vendor platform capabilities based on each vendor’s product feature set as of February 2019 and future development plans. Because the market continually evolves, clients should supplement the insights presented here with other resources designed to inform vendor identification and selection. When making specific tool selection decisions, use it in combination with our companion Magic Quadrant

to the product capabilities described in this research. The Critical Capabilities methodology factors in a range of criteria in determining product scores, as shown by the extensive Evaluation Criteria section.

Product/Service Class Definition

MMPs facilitate direct marketing on mobile devices by enabling mobile campaign management and activation. These platforms can operate as stand-alone solutions, but they typically integrate with, or operate alongside, CRM, location/data management, and MMH or email marketing platforms. Regardless of how a mobile marketing platform gets deployed, the native or third-party analytics supporting its audience targeting, campaign sequencing, personalization and performance measurement capabilities form its foundation.

Mobile marketing platforms exploit a range of mobile-specific techniques, including mobile websites, mobile applications, messaging (from bare-bones SMS to rich applications such as WeChat), push notifications (in-app and from websites) and mobile wallet cards. Given the variety of available touchpoints, many marketers and technology providers see MMPs as bundlers of individual tactics, such as push notifications or in-app messages.

Marketing organizations can deploy these tactics by using one of two platform types, as outlined earlier in the What You Need to Know section of this report:

- **An MMH with native mobile marketing capabilities:** Offers mobile marketing as part of a broader marketing cloud. These vendors deliver a range of engagement and analytics capabilities for mobile web and mobile applications. They offer native mobile marketing capabilities, but may also partner with third parties to support capabilities around delivery, monetization and measurement.
- **A purpose-built MMP.** Enables direct-marketing engagement capabilities, including SMS campaign design, delivery and reporting, push notification and in-app messaging, and mobile wallet integration. In addition, these solutions can link to existing marketing platforms, such as email and social marketing.

Critical Capabilities Definition

Audience Segmentation

This capability enables marketers to assemble groups of customers based on their demographic attributes and behaviors. Segment attributes can include product and mobile preferences, potential profitability and customer life cycle stage informed by search and other data.

Campaign Workflow

This capability choreographs the work required to design and execute mobile marketing

This capability enables the creation of models to forecast optimal mobile campaign performance, with the ability to adjust parameters as needed. Multiple scenarios or A/B tests can predict the success of a campaign or offer.

Event-Triggered Engagements

This capability enables marketers to trigger mobile engagements based on information such as user location information or having a birthday, as well as a user's behavior – for example, when a user downloads an app or abandons a mobile shopping cart.

Real-Time Offers

This capability enables marketers to deliver real-time mobile offers via channels such as email, SMS or push notification, based on customer or segment insights (prior to an engagement) combined with information gleaned during an engagement, such as native location data.

Location-Based Offers/Engagements

Using a customer's current and historical location information (as permitted), this capability allows marketers to leverage real-time location information on a customer's mobile device to trigger relevant offers or engagements.

Use Cases

Acquisition

This use case involves the design, execution and optimization of campaigns to acquire new customers via their mobile devices.

This scenario includes goal setting, audience segmentation and content (including offers) that drives registration in settings such as an app or on a mobile site.

Engagement

This includes the design, execution and optimization of campaigns to cross-sell, upsell, motivate or inform existing customers on their mobile devices.

This scenario includes specific campaigns to grow revenue per customer, and to drive more-consistent customer engagement.

Retention

This is the design, execution and optimization of campaigns to persuade customers to engage via mobile devices, reengage lapsed customers and drive loyalty program sign-ups.

This scenario includes goal setting, identifying segments for retention campaigns and offers.

Vendors Added and Dropped

Added

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- Punchh
- Xtremepush

Dropped

No vendors have been dropped.

Inclusion Criteria

To be included in this Critical Capabilities research, vendors and products had to meet the same inclusion criteria used for the 2019 “Magic Quadrant for Mobile Marketing Platforms.”

Gartner focused on vendors that offer the most relevant and compelling mobile marketing solutions, and evaluated them against the following criteria.

Functionality

Vendors must support all of the following:

- The ability to create, execute and manage mobile marketing interactions
- Campaign planning, tracking and reporting with role/approval capability
- A user interface (UI) designed for marketing users who create, execute and report on mobile marketing interactions
- User/audience data collection, segmentation, campaign workflow and campaign execution
- Mobile engagement techniques that:
 - Create, generate, deliver and measure SMS/text, push notifications (for mobile web and mobile apps) and in-app messaging campaigns
 - Deliver mobile-optimized personalized content (e.g., to apps and mobile web engagements)
 - Deliver location-triggered messaging campaigns or offers
 - Create, deliver and measure mobile promotion
- Mobile marketing campaign optimization that provides:
 - The ability to balance/coordinate multiple constraints to maximize the value from a single campaign, or from multiple campaigns or engagements
 - Functionality that enables marketers to make trade-offs among different campaign options



- Message automation
- Message optimization
- Data onboarding and integration of data from customer's systems of record (e.g., CRM or CDP)

- Mobile marketing analytics involve:
 - Action metrics: Clicks leading to conversion (mobile web and mobile app)
 - Engagement metrics: Daily/weekly/monthly (D/W/M) mobile website visits, D/W/M app usage, video views, comments, social-media shares and/or "likes" for mobile web and mobile app
 - Location: Using a mobile device's native location function to identify a customer's physical position – the platform can use device-generated data or a third-party location data provider
 - A/B testing capabilities for content, communication channels and the timing of message/notification delivery

Advanced Capabilities

Vendors must support at least two of the following:

- Predictive analytics on message (SMS or push notifications) delivery (e.g., optimal time to send)
- Multivariate testing capabilities for message delivery (timing/frequency) and message/engagement content
- Attribution capabilities that enable marketers to track events that lead to conversion (e.g., purchase, download of an app and video view)
- Mobile wallet card support, including live content and push notification to the wallet card(s)
- Support for rich-messaging interactions – e.g., via RCS/RBM, Facebook Messenger, Apple Business Chat and WhatsApp

Market Presence and Momentum

For inclusion in the 2019 Magic Quadrant for Mobile Marketing Platforms (and, hence, this Critical Capabilities research report), vendors must meet at least one of the following revenue or customer criteria:

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- Vendors need to have generated at least \$15 million in 2018 and to have at least 10 paying customers using the MMP.
- Vendors must have at least 10 paying customers, of which at least five began paying for the product/service during the past 12 months.

Vendor Viability

All vendors need to have at least one year's worth of operating cash to fund operations at the current rate of cash depletion.

Product Criteria

Ability to ideate, create, distribute, execute and measure major mobile marketing campaign types:

- **Core messaging:** SMS/text, push notifications for apps, mobile/desktop web push notifications and in-app messaging
- **Orchestration (must have all):** Ability to design, deliver and measure all mobile marketing (e.g., push notifications, SMS and email) campaigns from customer's marketing system of record:
 - **Personalization:** Ability to apply context, including knowledge about users and their circumstances, to tailor relevant messaging, content, offers and interactions, e.g., rule-based personalization across web, mail, push- and in-app.
 - **Advanced capabilities (vendors must have at least one):**
 - Real-time offers based on user behavior, location triggers (e.g., public Wi-Fi or geofences) or profile information, such as birthdays, past purchases, abandoned shopping carts, transaction history or anniversaries
 - Predictive content – e.g., the ability to serve mobile engagements or offers aimed at moving the customer to the next phase of the purchase process or step in a relationship ahead of the customer-explicit request
- **Analytics basic action and behavior analytics (must have all):** Mobile website visits/actions; mobile app action/behavior analytics; and A/B offer testing, segment building and basic personalization:
 - **Advanced capabilities (vendors must have at least two):**
 - Multivariate offer/campaign testing



Honorable Mentions

Two additional vendors demonstrated many of the qualities we associate with MMPs, but they didn't meet all of our inclusion criteria. However, given the growth rates and the volatility of this marketplace, they are worth watching and evaluating for your own business needs.

The Digital Box

The Digital Box is a purpose-built MMP. The company's ADA platform combines robust, direct messaging campaign capability with AI-based techniques that retailers and other companies can use to personalize and measure messaging engagements through mobile and social channels. The Digital Box – through the digital marketing agencies that make up the bulk of the company's customer base – focuses on services in several industries. Target companies are, for the most part, smaller enterprises, with few technology experts in-house and less-digital-savvy marketers.

The Digital Box failed to meet several qualifying criteria for this Critical Capabilities. The current iteration of the platform does not support in-app messaging nor the two criteria for "location-triggered messaging campaigns" – that is, ability to generate location-based or geofence-triggered engagements to a customer's mobile app.

Mobivity

Mobivity is a purpose-built MMP with a strong focus on companies with a physical retail presence that seek to increase customer lifetime value by developing greater loyalty and accelerating purchase frequency. The platform relies primarily on a combination of messaging and customized web experiences. It can integrate with a variety of POS systems, allowing retailers to exploit printed receipts as an engagement and promotion mechanism. Mobivity has been an early leader in the use of RCS as an engagement mechanism. In 2018, Mobivity enhanced its loyalty offering through its acquisition of Belly.

Mobivity failed to meet several qualifying criteria for this Critical Capabilities. The company's solution does not currently support push notifications (neither on the web nor app), in-app messaging, or the ability to generate location-based or geofence-triggered engagements to a customer's mobile app. In addition, the company did not satisfy the above-specified "market presence and momentum" criteria.

Table 1: Weighting for Critical Capabilities in Use Cases

Critical Capabilities ↓	Acquisition ↓	Engagement ↓	Retention ↓
Audience Segmentation	20%	20%	20%
Campaign Workflow	25%	20%	20%



Critical Capabilities ↓	Acquisition ↓	Engagement ↓	Retention ↓
Event-Triggered Engagements	15%	15%	15%
Real-Time Offers	15%	15%	15%
Location-Based Offers/Engagements	10%	12%	10%
Total	100%	100%	100%

Source: Gartner (October 2019)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighed in terms of its relative importance for specific product/service use cases.

Critical Capabilities Rating

Each of the products/services has been evaluated on the critical capabilities on a scale of 1 to 5; a score of 1 = Poor (most or all defined requirements are not achieved), while 5 = Outstanding (significantly exceeds requirements).

Table 2: Product/Service Rating on Critical Capabilities

Critical Capabilities ↓	Adobe ↓	Airship ↓	Braze ↓	FollowAnalytics ↓
Audience Segmentation	3.7	4.1	4.0	3.5
Campaign Workflow	3.6	3.9	4.0	3.6
Analytics	3.2	3.1	3.2	3.0
Event-Triggered Engagements	3.2	4.1	3.9	3.6
Real-Time Offers	3.2	4.1	3.9	3.6
Location-Based Offers/Engagements	3.0	3.6	3.6	3.4

Source: Gartner (October 2019)

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Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

Use Cases ↓	Adobe ↓	Airship ↓	Braze ↓	FollowAnalytics ↓	IBM ↓
Acquisition	3.38	3.85	3.81	3.47	3.3
Engagement	3.36	3.82	3.78	3.45	3.3
Retention	3.36	3.81	3.77	3.44	3.2

Source: Gartner (October 2019)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Evidence

¹ “Global Digital Future in Focus 2018” (<https://www.comscore.com/Insights/Presentations-and-Whitepapers/2018/Global-Digital-Future-in-Focus-2018>)

² “Survey Analysis: Retailers Must Elevate Mobile as a Priority”

³ “Consumer Insight: Gen Z in 2019”

Gartner’s 2019 Multichannel Marketing Survey: This survey explored how companies use insights-driven approaches to deliver relevant, personalized conversations. It also delved into how companies leverage technology, techniques and timing to make customer data action-oriented, attributable and privacy-compliant in the context of broader business goals.

The survey was conducted online by an external partner between November 2018 and January 2019 among 381 respondents, which included the U.S. (n = 218), Canada (n = 66) and the U.K. (n = 97). Respondents were required to be involved in decisions pertaining to their company’s multichannel management strategy and execution. Respondents were also required to have direct responsibility over at least three digital channels. Seventy-nine percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries (number of respondents in parentheses): financial services (82), high tech (88), manufacturing (44), consumer products (32), media (13), retail (61), healthcare providers (31), and travel and hospitality (30).

Gartner’s 2018 Marketing Technology Survey: Results presented are based on a Gartner study

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telephone interviewing [CATI]) from April through June 2018 among 504 marketers in North America (60%) and the U.K. (40%). Eighty-six percent of respondents came from organizations with \$1 billion or more in annual revenue.

Respondents came from a variety of industries (number of respondents in parentheses): financial services (88), high tech (128), manufacturing (83), consumer products (33), media (31), retail (47), healthcare (51), and travel and hospitality (43). Respondents were required to have a primary role in involvement in decisions pertaining to their company's marketing technology strategy. Respondents were also required to provide direct support to marketing. A team of Gartner analysts who follow marketing developed the survey, and Gartner's Research Data and Analytics team reviewed, tested and administered it.

Gartner's 2019-2020 CMO Spend Survey: The purpose of this survey was to understand the marketing priorities and budget allocations of marketers to help companies benchmark, allocate spend and prioritize. The research was conducted using a mixed methodology (online/CATI) from June 2019 through August 2019 among 430 respondents in the U.S. (47%), Canada (7%), France (10%), Germany (11%) and the U.K (25%).

Respondents were required to have involvement in decisions pertaining setting or influencing marketing strategy and planning, as well as have involvement in aligning marketing budget/resources. Eighty-three percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (67 respondents), high tech (40 respondents), manufacturing (65 respondents), consumer products (36 respondents), media (39 respondents), retail (69 respondents), healthcare providers (36 respondents), IT and business services (37 respondents), and travel (41 respondents).

The three aforementioned surveys were all developed collaboratively by a team of Gartner analysts who follow marketing, and were reviewed, tested and administered by Gartner's Research Data and Analytics team.

Note: The results of all three studies do not represent global findings or the market as a whole, but are a simple average of results for the targeted countries, industries and company size segments covered in each.

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of



In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

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