

# The Forrester Wave™: Cross-Channel Attribution Providers, Q4 2014

by Tina Moffett, November 7, 2014

## KEY TAKEAWAYS

### **AOL/Convertro, Google, And Visual IQ Lead The Pack**

AOL/Convertro, Google, and Visual IQ lead the pack with extensive measurement, insights, and optimization experience. eBay Enterprise, Marketing Evolution, and MarketShare offer competitive options but require product investment to be on a buyers' shortlist. Abakus and Rakuten DC Storm show promise but require investment in furthering core capabilities.

### **Attribution Market Expands As CI Pros Look For Holistic Performance Measurement**

The cross-channel attribution market is growing as more CI pros see attribution as a way to accurately analyze cross-channel interactions. This market growth is in large part due to the fact that CI pros increasingly trust attribution providers to act as strategic partners, advising them on top measurement and marketing planning decisions.

### **Data Management And Insights Activation Are Key Differentiators In This Market**

Older measurement technologies are less effective as improved capabilities determine the leaders in this space. Vendors that offer holistic performance measurement, a solid approach to data management, and the capability to instantly turn insights to action are positioned to significantly change marketing and media strategy.

### **Access The Forrester Wave Model For Deeper Insight**

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.



## The Forrester Wave™: Cross-Channel Attribution Providers, Q4 2014

Tools And Technology: The Cross-Channel Attribution Playbook

by [Tina Moffett](#)

with [Mary Pilecki](#) and Rebecca McAdams

### WHY READ THIS REPORT

In Forrester's 56-criteria evaluation of cross-channel attribution vendors, we identified the eight most significant cross-channel attribution providers with advanced algorithmic-based models — Abakus, AOL/Convertro, eBay Enterprise, Google, Marketing Evolution, MarketShare, Rakuten DC Storm, and Visual IQ — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other, in order to help customer insights (CI) professionals select the right partner for their cross-channel attribution.

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Forrester conducted product and services evaluations in August 2014 and interviewed eight vendor and user companies: Abakus, AOL/Convertro, eBay Enterprise, Google, Marketing Evolution, MarketShare, Rakuten DC Storm, and Visual IQ.

### Related Research Documents

[Innovate To Become Attribution Masters](#)  
September 2, 2014

[Cross-Channel Attribution Presents A Clear Path To Marketing ROI](#)  
September 20, 2012

[The Forrester Wave™: Cross-Channel Attribution Providers, Q2 2012](#)  
April 30, 2012

## ATTRIBUTION VENDORS PROVIDE A SINGLE SOURCE OF TRUTH

Marketers want a more comprehensive measurement technique to understand how their channels, tactics, and customers are truly performing. Enter cross-channel attribution — a holistic approach for understanding marketing performance. Forrester defines cross-channel attribution as:

*The practice of using advanced statistical approaches to allocate proportional credit to marketing communications and media activity across all channels, which ultimately leads to the desired customer action.*

The cross-channel attribution market is an extremely fragmented list of players across the services and technologies space. Over the past two years, the attribution market has seen a variety of new entrants — from traditional marketing mix modeling providers to new startups and ad technologies. A broad array of vendors focuses on cross-channel measurement, and marketers turn to these firms to provide guidance on development, management, and analysis of complex marketing efforts. Specifically, these vendors help firms:

- **Turn insights into action.** The business technology (BT) agenda enables firms to use the right technologies, like attribution, to analyze behavior and interact with customers across the customer life cycle.<sup>1</sup> CI pros want technology capabilities to help them take action on insights. Best-of-breed attribution tools create budget recommendations, frequency and cadence recommendations, and can instantaneously change media buys and marketing plans by linking insights into media buying engines. One CI pro told us, “Before attribution, we didn’t know how often we needed to market to people through different touchpoints, and now we can execute frequency tests to determine the most optimal number of interactions needed for a conversion.”
- **Calculate accurate customer and channel performance metrics.** Eighty-eight percent of Forrester Wave survey respondents indicate they leverage cross-channel attribution to gain true performance of metrics and insights across channels. Why? Specific factors, such as ad viewability, cookie stuffing, and exposure to other media not tracked, influence how marketers rate the effectiveness of their campaigns. Attribution providers deliver well-defined marketing and consumer performance metrics, incorporating true attributed marketing cost and revenues. Attribution measurement fundamentally refines CI pros’ approach to measuring cross-channel impact.
- **Provide a holistic view of the customer purchase path.** Customers interact with brands 24x7, across various channels, and measuring the marketing and media impact is challenging. Attribution vendors are able to measure marketing and media exposures across channels and platforms, taking into consideration addressable and nonaddressable marketing activities. This process enables their clients to gain a full view of performance that will drive future marketing and media investment.

- **Tame the messiness of big data.** Big data provides rich sources of insights, so marketers can trace and analyze unique footpaths across the customer journey.<sup>2</sup> Attribution tools can help brands collate, sift through, and manage various data sources. As one campaign director said, “We needed a vendor that could scrutinize every data point and help us understand gaps in our data.”

## CROSS-CHANNEL ATTRIBUTION EVALUATION OVERVIEW

Attribution solutions are critical to the enterprise marketing solution and to the overall BT agenda. Attribution provides deep marketing performance insights to fuel marketing and media execution and orchestration of the marketing planning process. To help brands select the best attribution provider, Forrester included eight vendors in the Forrester Wave evaluation: Abakus, AOL/Convertro, eBay Enterprise, Google, Marketing Evolution, MarketShare, Rakuten DC Storm, and Visual IQ. Each of these vendors (see Figure 1):

- **Is growing aggressively.** Cross-channel attribution is in high demand, with growing interest across industries such as retail and financial services. To narrow the focus of our analysis, we selected vendors that: 1) grew their revenue over 25% annually from 2012 to 2013 from new clients and renewals and 2) are innovators within the field.
- **Has an advanced algorithmic attribution approach.** For vendors to qualify for the cross-channel attribution Forrester Wave evaluation, their primary go-to-market approach must be based on advanced algorithms. We eliminated vendors with clients that primarily use rules-based or last/first touch approaches, because these remedial approaches falsely boost campaign and channel performance and do a poor job of measuring cross-channel impact.
- **Has experience with cross-channel integration.** To narrow the scope of our evaluation to key players in the market, all vendors must have experience with integrating online, offline, and mobile marketing and media touchpoints. Additionally, all vendors must have experience with integrating various sales conversion points, including mobile, digital, in-store, call center, and direct sales representative.

The attribution vendor market is an extremely fragmented space; many vendors have different core offerings — data management platforms, marketing technology platforms, advertising technology platforms — and attribution measurement platforms usually complement the core offering. Some vendors did not meet the core requirements for this particular evaluation. Digital-savvy attribution vendors like Encore Media Metrics, C3 Metrics, and IgnitionOne/Knotice have strong measurement and optimization capabilities but did not meet the specific channel integration Forrester Wave criteria. Since we are assessing attribution technologies, we did not review traditional marketing mix modeling and analytics service providers like Analytic Partners and Marketing Management Analytics.

**Figure 1** Evaluated Vendors: Product Information And Selection Criteria

Vendor name	Product name	Quarter
Abakus	Abakus	Q3 2014
AOL/Convertro	Convertro	Q3 2014
eBay Enterprise	eBay Enterprise Attribution Engine	Q3 2014
Google	Adometry Platform	Q3 2014
Marketing Evolution	ROI Brain Platform	Q3 2014
MarketShare	360	Q3 2014
Rakuten DC Storm	Rakuten DC Storm	Q3 2014
Visual IQ	IQ Intelligence Suite	Q3 2014

**Selection criteria**

**Growth.** The vendors must exhibit over 25% growth from new and existing clients.

**Attribution approach.** The vendor’s primary approach must be algorithmic based.

**Channel integration.** The vendor must integrate at least four out of the six mobile marketing and media subchannels integrated for its clients. Vendors must also integrate a significant amount of offline marketing/media channels (three or more channels and at least one offline channel with over 10% integration in the client base).

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**The Evaluation Analyzes Three Core Aspects Of Each Vendor’s Offering**

Forrester examined past research, user need assessments, and vendor and expert interviews to develop a comprehensive set of evaluation criteria. We evaluated vendors against 56 criteria, which we grouped into three high-level buckets:

- **Current offering.** Forrester’s criteria to assess the strength of a cross-channel attribution vendor are weighted toward enterprise clients. We evaluated each vendor against nine groups of criteria: attribution offering; data management; partnerships; onboarding and engagement model; reporting and analysis; attribution technology interface; actionability outputs; vendor services and support; and cost and pricing structure.
- **Strategy.** We compared each company’s strategy with the needs of customer insights professionals, industry trends, and Forrester’s forward-looking vision of the cross-channel attribution market to assess how each vendor is positioned to enable its future success. In this context, we examined three specific criteria: corporate strategy, product strategy, and the strength of the management team.

- **Market presence.** Lastly, to determine current market presence in the cross-channel attribution market, we evaluated each vendor's financial stability, customer base, and global strategy.

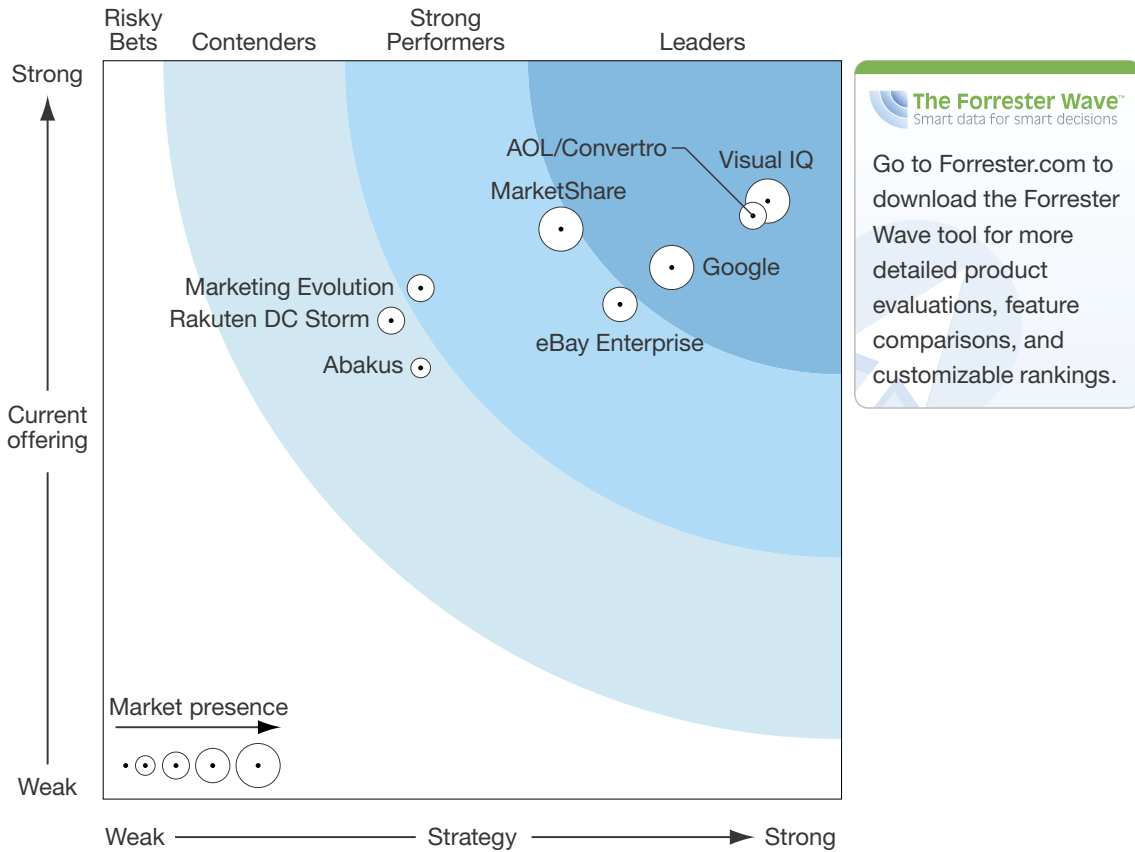
## EVALUATED VENDORS OFFER A POWERFUL MIX OF TOOLS AND INSIGHTS

This Forrester Wave evaluation focuses on cross-channel attribution and the vendor's ability to incorporate all touchpoints, marketing, and media interactions across all channels — online, mobile, and offline. Additionally, many players that we screened and incorporated into our evaluation provide a wide range of expertise and services. We specifically evaluated these cross-channel providers based on the value they deliver to marketers and customer insights professionals — assessing and weighing their data management, insights, and analytical prowess. Based on this landscape, we discovered (see Figure 2):

- **Visual IQ, AOL/Convertro, and Google are clear Leaders in this space.** These vendors have strong core attribution methodology, reporting and analytics capabilities, and actionability on insights. Visual IQ demonstrated a clear understanding of how to use attribution measurement to better inform future interaction strategies. Convertro, recently acquired by AOL, made substantial investments over the past few years, including integrating television insights data across the entire customer purchase path to measure cross-channel impact. Google, having recently acquired Adometry, now brings the ability to easily bridge the mobile and digital world.
- **eBay Enterprise, Marketing Evolution, and MarketShare offer competitive options.** eBay Enterprise makes another appearance as a Strong Performer, with an impressive vision for attribution to be more integrated in the greater marketer enterprise offering. Newcomers MarketShare and Marketing Evolution could disrupt the attribution space with their innovative approaches. MarketShare, named a Leader in “The Forrester Wave: Marketing Mix Modeling, Q2 2013,” shows significant promise in providing a true holistic performance measurement approach, using one algorithm to uncover the impact of traditional marketing mix with user-level attribution measurement.<sup>3</sup> Marketing Evolution provides a unique approach to attribution, using panel survey data and matching it with marketing/media data at the individual level.
- **Abakus and Rakuten DC Storm show promise.** Abakus and Rakuten DC Storm debut as Contenders, showing solid core measurement capabilities. Abakus has a strong onboarding process, and clients are extremely satisfied with the vendor's ability to help them plan future media and marketing strategy. However, Abakus must focus on developing more campaign-level dashboards and customer analysis, while creating an approach for top-down measurement. Rakuten DC Storm has an exceptional training program and a long-term vision for its attribution product to be more tightly integrated with ad technologies. It must develop its scenario planning capabilities to give users the power to shift marketing budgets and estimate impact.

This evaluation of the cross-channel attribution market is intended to be a starting point only. We encourage clients to view the detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

**Figure 2** Forrester Wave™: Cross-Channel Attribution, Q4 '14



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**Figure 2** Forrester Wave™: Cross-Channel Attribution, Q4 '14 (Cont.)

	Forrester's Weighting	Abakus	AOL/Converto	Rakuten DC Storm	eBay Enterprise	Google	Marketing Evolution	MarketShare	Visual IQ
<b>CURRENT OFFERING</b>	50%	2.92	3.95	3.24	3.35	3.60	3.46	3.86	4.05
Product(s) evaluated	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Attribution offering: general information	15%	2.92	3.76	3.24	1.60	3.44	4.84	4.40	4.56
Data management	30%	2.69	3.60	3.31	3.18	3.69	3.79	3.31	3.30
Partnerships	10%	2.20	5.00	3.80	4.20	4.20	1.00	4.20	5.00
Onboarding and engagement model	5%	4.20	4.20	5.00	5.00	3.00	4.20	5.00	3.80
Reporting and analysis	5%	2.60	3.80	3.30	3.90	4.00	3.80	2.50	4.40
Attribution technology interface	10%	2.90	4.20	3.10	3.60	3.30	2.30	3.80	3.70
Actionability outputs	15%	3.50	4.00	2.50	3.50	3.50	4.00	4.00	4.50
Vendor services and support	10%	3.00	3.90	2.80	4.10	3.50	2.70	4.30	4.20
Cost and pricing structure	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>STRATEGY</b>	50%	2.15	4.40	1.95	3.50	3.85	2.15	3.10	4.50
Corporate strategy	40%	2.00	4.00	2.00	3.00	4.00	2.00	3.00	4.00
Product strategy	55%	2.00	5.00	2.00	4.00	4.00	2.00	3.00	5.00
Strength of management team	5%	5.00	1.00	1.00	2.00	1.00	5.00	5.00	3.00
<b>MARKET PRESENCE</b>	0%	1.48	2.74	2.32	3.08	4.06	2.72	4.02	4.03
Financials	45%	1.00	1.80	1.80	3.40	3.40	2.60	4.60	4.40
Customers	50%	1.80	3.40	2.60	2.60	4.60	3.00	3.40	3.80
Employees	5%	2.60	4.60	4.20	5.00	4.60	1.00	5.00	3.00

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

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## VENDOR PROFILES

Below are high-level snapshots of what capabilities placed each vendor in its current position in this Forrester Wave evaluation. Detailed scorecards are available in the Forrester Wave Excel-based vendor comparison tool.

### Leaders

- Visual IQ.** Visual IQ is a Leader in the cross-channel attribution space, with the most experience in incorporating all marketing channels into its attribution model, including call center, mobile, and point-of-sale (POS) data. Visual IQ scored very well on the actionability output criteria, with its ability to build dynamic scenarios and push out recommended media



buys. Its overall vision is to use attribution as a springboard to more dynamic customer interaction decisions, like informing real-time interactions. However, it must continually invest in additional analytics research and development to achieve this vision.

- **AOL/Convertro.** Acquired by AOL in May 2014, AOL/Convertro makes a big leap forward as a Leader in the cross-channel attribution space, with investments in its algorithmic approach, interface, and scenario planning capabilities.<sup>4</sup> One client said: “Convertro’s tool provides flexibility. It allows me to analyze data across different dimensions, and we have the ability to measure and analyze in real-time.” The vendor has a clear vision: to improve the speed of insights to action, giving marketers the ability to instantly correct course. However, AOL/Convertro must provide deeper customer-driven analysis, like contextual insights, to help its clients understand affinity and motivation.
- **Google.** Google acquired Adometry in May 2014 to further enhance its cross-channel measurement capabilities.<sup>5</sup> That acquisition paid off, as Google emerged as a Leader in the attribution measurement space, with its strong approach to data import and linkage across multiple platforms using a universal ID framework. Like AOL/Convertro, Google will face strong challenges from its clients and prospects regarding its ability to provide unbiased insights. It claims to have a “Chinese wall” between its measurement and advertising technology platforms, to ensure no comingling between insights and media buying.

### Strong Performers

- **MarketShare.** MarketShare, a traditional marketing mix modeling firm, has exploded into the cross-channel attribution space as a Strong Performer. It receives high marks for its onboarding and engagement model capabilities, as well as its data collection and integration approach. The vendor has an impressive list of dynamic cross-marketing reports, including performance down to the placement level and cross-channel impact reports. MarketShare’s strategy is to develop an integrated performance measurement model; however, its road map is unclear on how specific developments are clearly aligned with its overall corporate vision.
- **eBay Enterprise.** eBay Enterprise Marketing Solutions acquired attribution pure play ClearSaleing in January 2011 to bolster its performance measurement capabilities. This year’s evaluation puts eBay Enterprise squarely in the Strong Performer space — again. The vendor has robust attribution supporting services and extensive tool and methodology training programs. Its new partnership with FICO brings world-class performance analytics across multiple platforms. eBay’s biggest hurdle is to develop a clear road map to acquire more clients — beyond its core retail client base. Since eBay Enterprise acquired ClearSaleing, the eCommerce giant remained relatively quiet regarding its attribution capabilities until September 2014, when it announced its Commerce Marketing Platform. This long silence raised red flags on its focus to provide a stellar advanced attribution measurement platform, and we will follow eBay’s progress.

- **Marketing Evolution.** Marketing Evolution, another newcomer to the attribution Forrester Wave, earned a Strong Performer status with its unconventional methodology for measuring marketing and media efficiency and effectiveness. Client references are extremely happy with its attribution approach, leveraging panel data and marketing performance data to determine the true performance of each channel. However, its product road map focuses on developing capabilities that competitors already have, such as delivering granular-level insights into buying systems and expanding digital partnerships.

## Contenders

- **Rakuten DC Storm.** DC Storm, acquired in 2014 by Rakuten, an eCommerce and Internet company, has surfaced as a Contender with its extensive experience in integrating different sales conversion points beyond digital — including mobile, call center, and mail order. Its Storm Professional training for its attribution interface extends not only to end users, but to agencies as well, consisting of a series of video modules with examinations to assess progress and knowledge. The vendor must develop specific capabilities, including scenario planning and optimization functionalities for users to manipulate and run different scenarios.
- **Abakus.** A newcomer to the cross-channel attribution Forrester Wave, Abakus is a small, but impressive, performance measurement vendor with core strengths in offline marketing and media integration, attribution approach, and onboarding services, making it a Contender in this market. Clients also give it high satisfaction scores for its data management and data update approach. But its product road map is focused on basic capability upgrades, including developments in reporting, and traditional marketing mix modeling approach.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Client survey.** To understand overall product usage and satisfaction, Forrester conducted online surveys of existing clients of participating vendors.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

### The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

### Integrity Policy

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

## ENDNOTES

- <sup>1</sup> The BT agenda will help your firm obsess about and interact with your customers throughout the life cycle. They include life-cycle solutions and engagement platform technologies. Combined, they will help deliver seamless and compelling customer experiences. See the July 29, 2014, “[Top Technologies For Your BT Agenda](#)” report.
- <sup>2</sup> The explosion of big data has changed the course of business. Firms are turning vast amounts of data into insights. See the May 28, 2014, “[Big Data’s Big Meaning For Marketing](#)” report.
- <sup>3</sup> To learn more about the best-in-class marketing mix modeling providers, see the May 21, 2013, “[The Forrester Wave™: Marketing Mix Modeling, Q2 2013](#)” report.
- <sup>4</sup> To learn more about the AOL acquisition of Convertro, see the May 9, 2014, “[Quick Take: AOL Acquires Convertro, Adding Attribution To Its Ad Tech Stack](#)” report.
- <sup>5</sup> To learn more about Google’s acquisition of Adometry, see the May 8, 2014, “[Quick Take: Google Acquires Adometry](#)” report.

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« CHARLES IBRAHIM, client persona representing Customer Insights Professionals

