

Magic Quadrant for Mobile Marketing Platforms

Published 26 October 2020 - ID G00441689 - 49 min read

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Initiatives: [Marketing Technology and Emerging Trends](#)

Digital marketing leaders use mobile marketing platforms to acquire, engage and retain customers through meaningful, contextually relevant interactions on their most personal devices. Use this research to assess vendors that may be best-suited to help you fulfill your mobile marketing objectives.

This Magic Quadrant is related to other research:

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Market Definition/Description

What Are Mobile Marketing Platforms?

Gartner defines mobile marketing platforms as:

Software solutions that help organizations manage, activate and optimize marketing campaigns that target consumers with multiple message types — SMS/text, push notifications and in-app messages — on their mobile device.

These platforms exploit a range of mobile-specific tactics, spanning mobile websites, mobile applications, messaging (including SMS messaging and native applications), push notifications (on mobile apps and off websites), location-triggered interactions and mobile wallet cards.

Mobile marketing platforms can operate as stand-alone solutions within a marketing organization or agency. However, they are typically integrated with or operate alongside other marketing technology components, such as a set of capabilities in a multichannel marketing hub (MMH) or within marketing automation applications. This Magic Quadrant focuses solely on stand-alone, purpose-built mobile marketing platforms (PBMs).

The core capabilities of mobile marketing platforms include the ability to:

- Derive insights via web and app analytics about customer activity on a brand's mobile website and/or its mobile application — i.e., pages visited, products reviewed, service functions utilized or modules of an app utilized — and generate useful engagements.
- Use any of the major messaging types — i.e., SMS/text, push notifications (both browser-based and on mobile apps), and in-app messages — to augment multichannel campaigns or to deliver mobile campaigns to a brand's mobile customers.
- Leverage existing customer datasets to deliver a full array of marketing engagement types to an audience that is primarily accessible on mobile devices. Mobile marketing platforms can also integrate as a mobile-specialist platform within an MMH, email service provider or other broad martech solutions.

Magic Quadrant

Figure 1: Magic Quadrant for Mobile Marketing Platforms





Source: Gartner (October 2020)

Vendor Strengths and Cautions

Airship

Airship is a Leader in this Magic Quadrant. Its customer engagement platform is particularly well-suited for mobile customer engagement and retention use cases through strong segmentation and real-time engagement capabilities. Its operations are focused in the U.S. and Europe — the acquisition of Accengage in 2019 expanded Airship’s footprint on the continent — and a growing presence in Singapore and New Delhi. Airship’s clients tend to be marketers in retail, travel and hospitality, and media and entertainment. In the past year, the company introduced “Airship

Journeys,” its customer journey building tool, and bolstered testing and experimentation by acquiring Apptimize, a multivariate and A/B testing solution, in August 2019.

Strengths

- Platform scalability: Customers who reviewed Airship in Gartner’s Peer Insights indicate that the platform can handle high volumes of mobile engagements, a particular benefit for marketing teams looking to mobile to build and maintain customer relationships.
- Customer journey building: Since the last iteration of this research, Airship introduced “Airship Journeys,” a native customer journey building visual UI that enables marketers to create and optimize cross-channel customer journeys in one view. Its “Open Profiles” API enables marketers to integrate data from multiple third-party systems to augment customer profiles, and data can be streamed from Airship in real time to other systems.
- Technology partnerships: Like many platform vendors, Airship recently enhanced partnerships with MMH vendors including Salesforce, Adobe and Acoustic to extend its enterprise customers’ vendor options. The company also partnered with Movable Ink to enhance its rich-media personalization capabilities (as have a number of other vendors in this evaluation).

Cautions

- Price: Client references in past iterations of this research have cited Airship’s platform as expensive relative to other mobile marketing platforms — this year’s evaluation is no different. Purely price-conscious marketers should carefully weigh the platform’s functionality against their short-term budget requirements.
- Analytics and reporting: Airship’s performance analytics could be more intuitive and flexible, and response query times could improve. However, company executives report marked improvements in this area during the past year.

CleverTap

CleverTap is a Niche Player in its first year of inclusion in this Magic Quadrant. Its mobile marketing platform is mainly focused on campaign execution, audience segmentation, analytics for mobile apps — and, more recently, platforms such as WhatsApp. Its operations are geographically diversified, and its clients are predominantly small and midsize (SMB) digital companies with a mix of large enterprises. Top industries in its customer base are media and entertainment, financial services, and retail. CleverTap plans to continue investments in machine learning (ML) and AI to support enhanced personalization and real-time mobile engagements.

Strengths

- Data visualizations: CleverTap offers intuitive mobile analytics dashboards and easy-to-read data visualizations to help marketers of all levels understand and communicate the impact of

their mobile campaigns. Its visualizations include customer journey maps and user groups (e.g., cohort analysis).

- Audience segmentation: CleverTap permits marketers to automate the creation of audience segments based on past or real-time user actions. Marketers can also create audience segments using psychographics, native intent-based microsegments, custom lists, out-of-the-box recency, frequency, monetary value (RFM) analysis and other variables.
- Ease of use: CleverTap features an easy-to-use UI for marketers to create mobile marketing campaigns, including channel selection and geolocation targeting.

Cautions

- Sizable share of SMB customers: CleverTap's customer base is largely made up of digital-first or digital-only small and midsize businesses. While CleverTap has enterprise customers, prospective customers in organizations with many legacy systems and processes should probe whether CleverTap can support their mobile marketing needs.
- Customer acquisition: CleverTap emphasizes customer engagement and retention over acquisition. While it has partner integrations that support customer acquisition, marketers evaluating CleverTap's platform may need to rely on other tools in their marketing technology stack for their customer acquisition efforts.

FollowAnalytics

FollowAnalytics is a Challenger in this Magic Quadrant. Its mobile marketing platform focuses on integrating with MMH platform vendors to deliver a core set of mobile messaging and real-time mobile tactics to enterprise marketing teams. Its operations are focused in France and the U.S., with plans to expand in APAC. Its clients tend to be marketers in retail, financial services and hospitality markets. FollowAnalytics recently introduced a no-code mobile application development capability (dubbed "Build") and broadened its channel partnerships via reseller and co-seller agreements with Salesforce, Microsoft and Adobe. For 2020, the company plans to extend its AI capabilities.

Strengths

- Campaign workflow: Customers can adapt mobile campaigns based on user behaviors in relation to preset thresholds. In 2019, FollowAnalytics improved its campaign capability further by introducing an AI-enabled customer journey flow that displays how users can move from one segment to another over time. This enables marketers to identify patterns of behavior and events that can lead to conversions or churn.
- MMH integrations: FollowAnalytics extended its longtime go-to-market strategy of being pulled into deals by a customer's MMH vendors by deepening relationships with leading MMH providers, such as Salesforce, Oracle, Adobe and SAP, as well as commerce vendors such as

Magento (Adobe) and Shopify. This approach recognizes a reality that a significant percentage of aggressive, data-centric marketing teams utilize both an MMH and a stand-alone mobile marketing platform to optimize multichannel marketing strategies.

- **Predictive capabilities:** FollowAnalytics refined its send-time algorithms for targeted push messages, identifying the optimum time for conversion based on analysis of a customer set's past behaviors.

Cautions

- **Mobile app focus:** FollowAnalytics is shifting its strategic competitive focus on its "Build" no-code mobile app development capability. Mobile marketing teams that don't rely on mobile apps or already have satisfactory mobile app development capabilities may find FollowAnalytics less suitable for their needs.
- **Limited support:** With a dedicated focus on enterprise marketing teams — particularly those with aspirations of improving mobile's contribution within their multichannel marketing mix — FollowAnalytics' support teams are relatively small compared to other vendors evaluated in this research. As such, the platform may not be well-suited for teams with low levels of mobile marketing maturity.

IMImobile

IMImobile is a Challenger in this Magic Quadrant. Its mobile marketing platform focuses on helping marketers plan and orchestrate mobile campaigns across customer journeys. Its operations are geographically diversified, and its clients tend to be large enterprises in banking and financial services, retail, and telecom. IMImobile made a number of recent enhancements to its customer journey workflow capabilities, most notably adding customer journey analytics to diagnose and optimize key customer pain points.

Strengths

- **Channel offering:** IMImobile's comprehensive channel offering provides marketers with a broad range of communication formats, including Apple Business Chat, WhatsApp, Rich Communication Services (RCS) and more. Marketers can configure and personalize mobile engagements on these channels using data from unified customer profiles. Its acquisition of 3Cinteractive in 2019 has allowed IMImobile to extend this capability to enable deeply configurable mobile wallets as well.
- **Campaign workflow:** IMImobile's customer journey orchestration interface allows marketers to build multichannel campaign workflows using out-of-the-box, integrated or custom event triggers; ML-optimized orchestration; and multichannel communications. These campaign configurations and previews can be performed seamlessly within the same screens, improving workflow and providing a level of usability rivaling leading vendors.

- **Real-time engagements:** IMImobile's platform offers marketers flexible real-time engagement capabilities that can be configured via customer journey workflows. Channel trigger examples include incoming messages on SMS short/long codes, Facebook Messenger button-clicks, RCS and mobile app user interactions. Real-time engagements can also be triggered via prebuilt integrations such as customer relationship management (CRM) and digital commerce. API-driven custom events are also possible.

Cautions

- **Analytics and reporting:** Consisting of out-of-the-box summary dashboards and a report export function, the basic reporting capability within IMIcampaign may disappoint prospective clients looking for highly interactive and customizable dashboards.
- **Customer profile enrichment:** IMImobile supports core customer profile management features such as the ability to create custom profile schemas and add attributes. However, IMImobile lacks turnkey integrations for data ingestion from third-party providers, common with leaders in this market, meaning clients may need to rely on extract-transform-load ETL process or IT support for certain use cases.

Leanplum

Leanplum is a Niche Player in this Magic Quadrant. Its mobile marketing platform offers marketers the ability to manage customers' mobile experiences and orchestrate campaigns within a single, easy-to-use platform, including those extending to marketing channels beyond mobile. Its operations are geographically diversified, and its clients tend to be marketers in the retail, media and entertainment, and gaming industries. Leanplum's 2020 product roadmap calls for a significant increase in the number of native connectors to its platform, including connectors to nonuser data (e.g., product catalog) and out-of-the-box personalization modules.

Strengths

- **Simple product packaging:** Leanplum's solution consists of a single product, simplifying decision making for marketers seeking a mobile marketing platform. Pricing is standardized to two primary metrics: monthly active average users and, if applicable, number of emails delivered through its platform. The company established a limit on operational activity that accommodates 75% of its customers; anything beyond the threshold needs to be negotiated.
- **Testing and optimization:** Leanplum supports several forms of testing, especially in-app A/B testing. In addition to uncovering insights, these testing capabilities allow marketers to deliver more personalized messaging and enhanced in-app customer experiences.
- **User interface:** Leanplum provides marketers with an intuitive six-step process for creating a mobile marketing campaign. Marketers can navigate a drop-down menu of audience attributes when selecting targeting criteria, and the platform comes equipped with preconfigured templates for setting up a campaign.

Cautions

- **Basic predictive models:** Leanplum currently features predictive models for basic mobile campaign uses, such as identifying optimal message delivery time and message frequency caps. The company reports that AI-augmented audience segmentation and next best engagement are currently on its product roadmap.
- **Company at a crossroads:** Leanplum, which says it has 200 customers, reports it acquired only a few new customers from July 2019 through July 2020. Prospective customers should ask Leanplum and talk with reference customers to ascertain how the company may continue to evolve, given management changes in the past 18 months, such as the appointment of a new CEO.

MoEngage

MoEngage is a Leader in this Magic Quadrant. Its mobile marketing platform is mainly focused on mobile-centric engagement and orchestration, powered by AI and ML. MoEngage's operations are geographically diversified, and its clients tend to be marketers in retail, financial services, telecommunications and media industries. MoEngage's product roadmap remains focused on further developing its Sherpa AI functionality and improving AI-assisted features. The company also plans to launch collaboration and gamification features, and add new customer journey orchestration capabilities.

Strengths

- **AI-driven optimization:** Having embedded AI functionality into its audience segmentation and testing features, MoEngage allows marketers to test and optimize different mobile engagement combinations with predictive segments. For example, a predicted "churn" segment can feed into a randomized split of multiple journey orchestration paths, automatically optimizing a mobile engagement based on predefined goals. MoEngage also offers integrations with deeper industry-focused machine learning and recommendations tools.
- **Training and support:** MoEngage takes a diversified approach to ensuring client success. Its three-tiered customer support strategy encompasses cross-functional training resources, a "#GROWTH academy" and paid consulting services in support of the specialist approaches required in mobile marketing.
- **Push and app content customization:** MoEngage extended its native app content customization capabilities beyond the classic "inbox" to facilitate the creation of customizable "cards" that marketers can use to target customers with context-relevant content feeds. The company also developed out-of-the-box push templates to help mobile marketers quickly and easily deploy push notifications to boost customer engagement.

Cautions

- **Complex segmentation processing speed:** MoEngage offers real-time triggers and segmentation across the majority of use cases, and customer segments are processed at the time of campaign execution to ensure real-time data. In specific cases when historical, behavioral segment checks are combined with real-time segments, there can be a 45-to-60-minute refresh interval. MoEngage has a “precompute” segment function to minimize delays for push campaigns where complex segment queries take longer to run. Marketers considering MoEngage should detail their real-time audience segmentation needs to understand how the platform supports their delivery.
- **Platform performance consistency:** Gartner Peer Insights reviews cite occasional challenges with the platform performance. MoEngage has developed its platform capability at pace and handles a significant volume of real-time messaging, so may have some growing pains. Vendor references say the company resolves bugs and discrepancies quickly.

Plexure

Plexure is a Niche Player in its first year of inclusion in this Magic Quadrant. Its mobile marketing platform is mainly focused on helping marketers personalize engagements through mobile channels. Its operations are geographically diversified, and its clients tend to be marketers in quick-service restaurants (QSR), and retail and grocery. Plexure expects to expand its AI-enabled capabilities to help marketers automate campaign management and measurement. The company’s QSR focus was boosted in 2019 when McDonald’s Corp. bought 9.9% of Plexure.

Strengths

- **Modular platform:** Plexure’s highly modular platform is designed to enable marketing teams to utilize the platform’s core elements as needed, based on the team’s level of mobile marketing maturity. The modules operate on top of an AI/ML layer that enables longitudinal and real-time updates on attributes such as propensity to churn, product recommendations, RFM and pricing options.
- **Grocery, retail and QSR focus:** Plexure is particularly well-suited for marketers in large, franchised retail and QSR organizations. The company’s investments in real-time capabilities and predictive analytics make it well-suited for high-volume, high-frequency campaigns, which are particularly valued by marketers in these verticals. According to Plexure executives, the company plans to expand into other verticals such as financial services.
- **Fraud detection:** While all vendors evaluated in this Magic Quadrant have achieved SOC 2 compliance (a baseline requirement for any SaaS platform), Plexure incorporates a number of additional anti-fraud capabilities to detect fraudulent app registrations, loyalty point acquisitions or coupon-based offer redemption. These anti-fraud capabilities, including use of AI to detect fraudulent activity, are particularly important to high-frequency mobile campaigns that are a hallmark of QSR, grocery and specialty retail marketers.

Cautions

- **Mobile channel focus:** Plexure is focused on supporting high-frequency engagements that typify the needs of QSR, grocery and specialty retail organizations (convenience stores in particular). Plexure is largely an app-centric mobile marketing platform, but supports mobile web and email via integrations. Prospective clients looking for more expansive mobile capabilities, particularly for mobile web, will need to ensure Plexure's API support will enable preferred mobile web solutions.
- **Resources to match scale ambitions:** Plexure manages a relatively large number of customers in dynamic markets (e.g., QSR and grocery). With its stated focus on enterprises with greater than \$750 million in yearly revenue, Plexure's customer success teams are small relative to other vendors evaluated in this research. Company execs noted that they are adding resources to these teams this year. Prospective enterprise clients will need to carefully examine Plexure's business roadmap to ensure appropriate resources are available to service their needs.

Punchh

Punchh is a Niche Player in this Magic Quadrant. Punchh's mobile marketing platform is designed for omnichannel retailers that seek to build and deepen customer relationships across physical locations and mobile channels. Its operations are geographically diversified, and its clients tend to be marketers in QSR, convenience stores and retail organizations. Punchh provides marketers options, such as tiered memberships, for establishing and managing loyalty programs. The company's product roadmap includes plans to expand its offering to verticals beyond retail and convert its offer management capabilities into a stand-alone platform. It also plans to launch mobile app development tools for third parties.

Strengths

- **Integration with physical retail:** Punchh's platform is designed primarily for clients with a physical retail presence, integrating with a wide variety of point of sale (POS) systems. Its curbside pickup, geolocation and contactless payment capabilities give retailers a convenient and low-contact approach to serving customers during the COVID-19 pandemic.
- **Customer lifetime value:** Marketers can leverage out-of-the-box functionality to craft programs aimed to increase customer lifetime value (LTV). For example, users can create audience segments based on LTV (e.g., super fan, lapsing and low-value customers). A recommendation engine highlights the top three offers with the highest propensity for conversion in a given segment.
- **Customer-oriented design:** Punchh's mobile marketing platform is architected around a customer database, incorporating acquisition scenarios that support the transition from an unknown purchaser to a known customer, and a known customer to a high-value loyal customer. The platform's list management tools include message throttling and the identification and removal of suspicious or fraudulent users.

Cautions

- **Deployment complexity:** While Punchh continues to add prebuilt integrations with POS solutions, integrating some legacy POS solutions may require professional services.
- **Vertical support:** Punchh is best-known for its mobile use cases in retail verticals. As it continues its expansion into financial services, hospitality and life sciences, prospective clients need to request to speak with references.

Pyze

Pyze is a Challenger in this Magic Quadrant. Its Application Success Platform is mainly focused on providing cross-platform mobile analytics capabilities, and it features AI-driven segmentation and real-time mobile-centric, cross-channel campaign orchestration. Its operations are geographically diversified, and its clients tend to be large B2B and B2C organizations across various industries. Pyze's product roadmap includes plans to further develop its recommendations capabilities by including offer catalog ingestion and AI-driven campaign and audience suggestions.

Strengths

- **Cross-platform analytics:** Pyze offers comprehensive real-time, cross-platform analytics capabilities that help marketers track users across multiple channels. Marketers can integrate various data sources — including web, mobile apps and custom-made platforms — in interactive dashboards, custom cross-app reports and automated audience segments.
- **Customer journey analytics:** Pyze features advanced customer journey analytics capabilities relative to the market, helping marketers enhance both internal and customer-facing apps, with multi-app scope. Pyze's customer journey analytics features dynamic conversion funnels and screen path analysis to help marketers diagnose problems and customer pain points.
- **App development and publisher strategy:** Pyze integrates with mobile app development and publishing platforms through its "embeddable white label services," offering app developers and publishers capabilities such as aggregate reporting, single sign-on (SSO) and seamless workflow integration via APIs.

Cautions

- **Broad development:** Pyze has a unique approach to the market, spanning white labeling, multi-app development platforms and enterprise deployments. Due to this broad, multilayered technology focus, its feature prioritization is spread widely. Prospective clients should scrutinize Pyze's feature coverage and future roadmap to ensure the platform can fulfill short- and long-term mobile marketing needs.
- **Enterprise focus:** Pyze focuses on tailoring solutions for enterprises managing large-scale mobile applications alongside nonmobile platforms. Marketers in small to midsize organizations may not find Pyze a suitable fit for their mobile marketing needs.

Swrve

Swrve is a Leader in this Magic Quadrant. Its mobile CX engagement platform is focused on delivering real-time responses/offers based on user input and behavior. Its operations are geographically diversified, and its clients tend to be marketers in streaming media services, travel and hospitality, and financial services. Swrve is focusing investments on supporting large enterprise marketing teams and enabling an easier integration with customers' existing martech stacks. The company plans to introduce fully automated messaging in 2020, as well as a "universal API" that will enable marketers to deliver a synchronized set of mobile messages across a user's devices.

Strengths

- Real-time support: Swrve's heritage in mobile gaming — a sector that relies on frequent, real-time messaging to drive engagement and reengagement — helped evolve its real-time mobile capabilities. The company also expanded support for virtually all major over-the-top (OTT) platforms and streaming media publishers.
- Investments in AI and ML: Swrve has made recent investments in AI and ML to standardize its propensity to churn models, which it now runs at scale. It also delivered a propensity to convert model that uses past user behavior and purchases, for example, to calculate when a prospect or customer is likely to convert within a specified timespan.
- Automation, dashboard and reporting: The company's analytics and reporting capabilities were enhanced since the last iteration of this research, with improvements in out-of-the-box campaign templates, as well as refined user interfaces for lifetime value profiles "at a glance" and reporting via expanded data integrations.

Cautions

- Service and support: As Swrve shifts its focus to enterprise customers, marketers considering the platform should press the company to ensure it can scale its service and support operations and professional services — areas where it has historically trailed other Leaders (and some Niche Players). This is particularly important for enterprises with less mature mobile marketing capabilities.
- Enterprise and B2C focus: Marketers in small to midsize organizations, particularly those operating within B2B business models, may not find Swrve a suitable fit for their mobile marketing needs.

Upland (Localytics)

Upland Software (Localytics) is a Challenger in this Magic Quadrant. In February 2020, Localytics was acquired by Upland Software. The Upland Localytics mobile marketing platform is primarily focused on delivering mobile-centric capabilities to extend the value of customers' existing MMH investments. Its operations are focused in the U.S. and Europe, and its clients tend to be marketers

in retail, media and entertainment, financial services, nonprofit, and government verticals. Upland Localytics expanded its mobile web options in 2019 with the introduction of browser-based push notifications. The company plans to introduce enhanced channel optimization and product recommendations in 2020.

Strengths

- **Mobile analytics:** Customers have historically valued Upland Localytics' robust analytics capabilities. The company recently expanded the size of control groups for any hypothesis testing and data exploration from a cap of 5% of a customer base to virtually unlimited.
- **Ease of use:** Upland Localytics maintains its reputation for ease of use. The company augmented this reputation by upgrading its Workflows customer journey creation capabilities, increasing the number of out-of-the-box templates available to users.
- **Personalization:** Upland Localytics improved its personalization capabilities by adapting predictive analytics capabilities for send-time optimization, as well as a "push throttling" capability that fixes several browser-based push and mobile app pushes per minute to reduce strain on marketers' servers. The company refined its personalization efforts further via a partnership with Movable Ink (as have a number of vendors in this evaluation).

Cautions

- **Platform capabilities-by-acquisition strategy:** Upland Localytics' strategic growth strategy of acquiring key platform capabilities needs to be taken into consideration. as prospective customers need to see alignment between their specific mobile marketing needs and Upland Localytics' strategic development plans.
- **Lagging feature sets:** Upland Localytics made a number of feature enhancements to its mobile marketing platform in the past year, such as the adoption of web push notifications. Yet these additions have lagged behind those of its competitors. Prospective clients looking to fully exploit mobile web capabilities will need to press the company to ensure its roadmap will keep pace with their marketing requirements.

Vibes

Vibes is a Leader in this Magic Quadrant. Its Vibes Mobile Engagement Platform is mainly focused on helping marketers develop cohesive customer experiences between a company's physical locations and its mobile channels. Its operations are focused in the U.S. and the U.K., and its clients tend to be marketers in retail, restaurants and financial services. Vibes has funneled recent investments in strengthening its data visualization capabilities and integrations with large MMH vendors.

Strengths

- **Mobile messaging:** With deep roots in mobile messaging and direct connections to the largest mobile operators' messaging networks, Vibes excels at helping marketers natively exploit a diversity of mobile messaging options, including SMS, mobile wallet, Facebook Messenger, chatbots and more.
- **Support for complex integrations:** Vibes enables transactions via point-of-sale systems — such as NCR and Oracle MICROS — and loyalty programs. Its data sharing initiative with cloud data platform Snowflake makes it easier and more secure for client companies to access their data, especially those with legacy systems.
- **Analytics and data visualizations:** Vibes offers the ability to feature geomaps, heat maps and network mapping in addition to charts and graphs in easy-to-navigate visualizations. It also permits users to develop customizable views and filters.

Cautions

- **Market fit:** Marketers for small and midsize organizations that don't sell direct to consumers may not find Vibes an appropriate fit. The platform is designed for midsize to enterprise marketing teams with a mature mobile marketing strategy.
- **User interface:** Elements of the platform's overall user interface — though functional — lack certain user-friendly features found in some other mobile marketing platforms, such as drag-and-drop functionality. The platform does, however, include a configurable template editor to easily create and visualize mobile websites and mobile wallets.

Xtremepush

Xtremepush is a Challenger in this Magic Quadrant. Its mobile marketing platform revolves around customer engagement, as well as AI- and ML-driven campaign orchestration and personalization. Its operations are mainly focused in Europe and North America, with a growing global presence. Its clients tend to be midmarket enterprises across gaming, publishing, financial services and digital commerce. Xtremepush's 2020 roadmap includes plans to enhance its prediction and decisioning capabilities, data collection, profile unification, ad fraud detection, and campaign workflow features.

Strengths

- **Native messaging and workflows:** The platform offers intuitive and exhaustive workflows for mobile campaign types and customer journey configurations. Xtremepush helps marketers automate mobile marketing decisions through a robust conditional logic feature for audience segmentation, the ability to configure event triggers (with the option of using ML model thresholds in multistep orchestration) and the use of data collected from extensive sources.
- **Advanced chat:** Xtremepush comes equipped with advanced chat functionalities. The platform supports natural language processing (NLP) and ML-driven chatbot features, as well as live

chat. Its live chat feature dovetails seamlessly with its chatbot feature for both clients and chat agents. The platform comes with chat management and queuing features, as well as augmented chat features that allow real-time knowledge-based suggestions for the agent.

- **ML- and AI-driven capabilities:** Xtremepush allows all mobile marketers to create dynamic decision points in campaign orchestration, driven by either imported or out-of-the-box (such as intelligent delivery) ML models. Its recommendation engines can be incorporated into mobile messaging via dynamic or static feeds, with A/B testing available. The company plans to continue its focus on supporting ML model creation, optimization and management.

Cautions

- **OTT messaging:** Xtremepush does not offer native messaging for OTT devices, such as smart TVs, game consoles and other streaming devices. Prospective clients requiring coverage in these areas should scrutinize the platform's integration capabilities for allowing mobile messaging and measurement across OTT devices.
- **Dashboard customization:** Although Xtremepush offers satisfactory levels of reporting across mobile campaigns, event triggers, A/B testing and more, its dashboard capability is more limited. Out-of-the-box dashboards lack advanced visualizations or customization.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- CleverTap
- Plexure

Dropped

- **Adobe:** Adobe's mobile marketing capabilities are covered in Gartner's Magic Quadrant for Multichannel Marketing Hubs. As the company does not sell its mobile marketing technology as a stand-alone platform (as is the case with most MMH vendors), it is not included in this evaluation.
- **Braze:** Braze was named a Leader in the 2019 Magic Quadrant for Mobile Marketing Platforms. Over the years, Braze's capabilities have evolved and expanded beyond mobile marketing, and we now see it as a player in the multichannel marketing hub market. The mobile-centric

approach to multichannel marketing is an example of one evolutionary path for the MMH market. As such, Braze is now included in Gartner's Magic Quadrant for Multichannel Marketing Hubs.

- **Acoustic:** Acoustic's mobile capabilities are evaluated in Gartner's Magic Quadrant for Multichannel Marketing Hubs. The company's mobile marketing offering is a core component of its multichannel platform but is not sold as a stand-alone platform. As a result, it is not included in this evaluation.
- **Oracle:** Oracle's mobile marketing capabilities are evaluated in Gartner's Magic Quadrant for Multichannel Marketing Hubs. Because they are not sold as stand-alone purpose-built mobile solutions, the company was not included in this evaluation.
- **Sailthru:** As an MMH, Sailthru's mobile capabilities were evaluated in Gartner's Magic Quadrant for Multichannel Marketing Hubs. Because these capabilities are sold as part of the MMH, and not as a stand-alone mobile solution, it is not included in this evaluation.
- **Salesforce:** Salesforce's mobile marketing capabilities are covered in Gartner's Magic Quadrant for Multichannel Marketing Hubs. Its capabilities are not sold as a stand-alone mobile marketing solution. As a result, the company is not included in this evaluation.
- **SessionM:** Mastercard acquired SessionM in October 2019, integrating its mobile and loyalty capabilities into Mastercard's proprietary platforms. SessionM's mobile capabilities are not sold as a stand-alone solution.

Inclusion and Exclusion Criteria

To qualify for inclusion in the 2020 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:

- Ability to create, execute and manage mobile marketing interactions
- Campaign planning, tracking and reporting with role/approval capability
- A 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 such as:**

- Create, deliver and measure “core messaging” capabilities — i.e., SMS/text, push notifications (for mobile apps) and in-app messaging campaigns
- Create, deliver and measure “advanced messaging” capabilities via at least one of the following consumer messaging apps:
 - Facebook Messenger
 - LINE
 - WhatsApp
 - Apple Business Chat
 - WeChat
 - KaKao Talk
 - Android’s rich business messaging (RBM)
- Deliver mobile-optimized personalized content, e.g., to apps and mobile web engagements
- Create, deliver and measure mobile-wallet-based marketing offers and engagements
- Deliver location-triggered messaging campaigns or offers
- Create, deliver and measure mobile promotion
- **Mobile marketing campaign optimization:**
 - The ability to balance/coordinate multiple constraints to maximize value from single or multiple campaigns or engagements. The platform’s functionality should enable marketers to make trade-offs among different campaign options based on which best delivers on established KPIs and objectives.
- **Mobile marketing analytics:**
 - Conversion metrics: Orders, app downloads, form completions, offer redemptions (for mobile web and mobile app)
 - Engagement dimensions and metrics: Daily/weekly/monthly (D/W/M) mobile website visits, app usage, video views, comments, social media shares and/or “likes” for mobile web and mobile app
 - Segmentation: The ability to leverage behavioral and conversion data to create segments available for reporting, targeting and activation

- Location: Utilizing a mobile device's native location function to identify a customer's physical position – the platform can utilize device-generated data or a third-party location data provider.
- A/B testing capabilities for messaging, timing of messages/push notifications and content
- Predictive analytics for mobile message delivery (SMS, in-app or push notifications), e.g., optimal time-to-send, optimal message type
- The ability to capture, record and maintain a customer's consent preferences for all marketing messaging, email communications, use of location data in messages or other marketing engagements. This includes the ability to integrate with data protection and privacy preference management platforms (e.g., consent and preference management platforms [CPMPs]) that enable customers to access and manage what personal data is being collected about them, as required by regulations such as the EU's General Data Protection Regulation (GDPR) or the California Consumer Privacy Act (CCPA).

Advanced Capabilities

Vendors must support at least four of the following:

- Multivariate testing capabilities for message delivery (timing/frequency) and message/engagement content
- Deep-linking and deferred deep-linking for standard mobile marketing use cases, e.g., web-to-app linking, app-to-app linking and SMS-to-app linking
- Attribution capabilities that enable marketers to track events that lead to conversion, e.g., purchase, download of an app and video view
- Mobile wallet support, including live content and push notification to a wallet
- Advanced personalization capabilities, e.g., the use of rich media such as video in push and in-app messaging triggered by a customer's behavior or profile
- Browser-based push messaging (aka "web push")

Market Presence and Momentum

For inclusion in the 2020 Magic Quadrant for Mobile Marketing Platforms, vendors must meet at least two of the following revenue or customer criteria:

- Vendors need to have generated at least \$20 million in revenue in 2019.
- Vendors must have at least 20 paying customers currently using the mobile marketing platform.

- Vendors must have added at least 15 paying customers in 2019, all of whom must have had at least three months of live operating experience as of January 2020.

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.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable mobile marketing provider performance to be competitive, efficient and effective. They look at a vendor's ability to positively impact revenue, retention and reputation within Gartner's view of the market.

- **Product/Service:** Includes core goods and services that compete in and or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills, etc. These goods and services can be offered natively or through OEM agreements/partnerships. Vendors must have demonstrated how their messaging capabilities support dominant mobile devices as well as emerging device types (e.g., wearables or linkage to OTT devices). Vendors must have also demonstrated campaign orchestration capabilities, workflows that are specific to mobile marketing and rich analytics capabilities for measuring and optimizing campaigns. Vendors should demonstrate these product capabilities against the three critical capabilities use cases of acquisition, engagement and retention.
- **Overall Viability:** Includes an assessment of the vendor's overall financial health, as well as the financial and practical success of the business unit. It also assesses the likelihood of the vendor to continue to offer and invest in the product as well as the product position in the current portfolio. Vendors must have demonstrated operational and financial skills to persevere in stable economic times, as well as demonstrated their resilience, and how their platform enables their end customers to maintain resilience in challenging times.
- **Sales Execution:** Includes the vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.
- **Market Responsiveness and Track Record:** Includes the ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness to changing market demands. Vendors must have demonstrated a focus on their ability to develop and implement customer-driven enhancements or features, as well as demonstrated how they are helping their clients respond to abnormal market events.

- **Marketing Execution:** Includes the clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message in order to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This awareness can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities.
- **Customer Experience (CX):** Vendors must have demonstrated how their platform directly enables their customers to develop and deliver on their CX strategies and tactics, as well as shown how their platform has specifically aided their customers in identifying and fixing CX problems.
- **Operations:** Includes the ability of the vendor to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (October 2020)

Completeness of Vision

Gartner analysts evaluate vendors on their understanding of how to exploit market forces to create value for customers and capture opportunities for themselves. This includes current and future

market direction, innovation, customer needs, and competitive forces and how well they map to Gartner's view of the market.

- **Market Understanding:** Includes the ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market — those that listen, understand customer demands and can shape or enhance their product's capabilities — enable their marketing customers to deliver compelling interactions.
- **Marketing Strategy:** Includes a clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements. Vendors must have demonstrated a distinct approach to positioning their platform and support capabilities.
- **Sales Strategy:** Includes a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, and communication. These vendors partner with customers to extend the scope and depth of market reach, expertise, mobile technologies, services and their customer base.
- **Offering (Product) Strategy:** Includes an approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements. Vendors must have demonstrated a comprehensive set of mobile messaging, email and consumer messaging app capabilities — native or via partner — that support the three major critical capabilities use cases of acquisition, engagement and retention.
- **Business Model:** Includes the design, logic and execution of the vendor's business proposition to achieve continued success.
- **Vertical/Industry Strategy:** Includes the strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. Vendors must have shown an ability to operate in at least three vertical industries and articulate specific problems in those verticals that their platforms can solve for marketers.
- **Innovation:** Vendors must have demonstrated that they can innovate with existing mobile marketing messaging and communications tactics. They must have also demonstrated in-house capabilities to apply advances in AI and ML to specific mobile marketing capabilities. Vendors must have also shown they have specific resources and capital for investment in technology, business model enhancement, services capabilities, and vertical or geographic market expertise.
- **Geographic Strategy:** Includes the vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (October 2020)

Quadrant Descriptions

Leaders

Leaders possess the resources and acumen to deliver extensive mobile marketing capabilities guided by a clear, comprehensive view of mobile marketing's crucial role as the dominant engagement point for customers and prospects. Leaders have executed a substantial number of implementations across a variety of industries. They push their customers toward more advanced states of mobile marketing capabilities. Leaders primarily support B2C marketing scenarios, but can also support B2B scenarios.

Challengers

Challengers have strong core mobile marketing product functionality, but their incomplete vision of mobile marketing's role in marketing and how mobile evolves makes it difficult for them to push their customers outside of their "mobile comfort zone." Their solutions may be limited to specific use cases, technical environments or application domains. Their vision may be hampered by the lack of a coordinated strategy across the various products in their platform portfolios. Alternatively,

they may lack the marketing efforts, sales channels, geographic presence, industry-specific content and awareness of the vendors in the Leaders quadrant.

Visionaries

Visionaries have a strong and unique vision for delivering mobile marketing capabilities. They offer depth of functionality in the areas they address; however, they may have gaps relating to broader functionality requirements or lower scores on customer experience, operations and sales execution. Visionaries are thought leaders and innovators, but they may be lacking in scale, or there may be concerns about their ability to grow and still provide consistent execution.

Niche Players

Niche Players do well in a specific segment of the mobile marketing platform market. In addition to basic offerings, they may offer a few specialized capabilities that target a narrow client set — for example, by industry or business model — that typically utilizes a handful of mobile marketing techniques. They may have a limited capability to out-innovate or outperform other vendors, but likely lack depth of functionality elsewhere. They may also have gaps relating to broader platform functionality or lower-than-average customer ratings. Alternatively, Niche Players may have a reasonably broad mobile marketing platform, but limited implementation and support capabilities, or a relatively limited customer base (such as by geography or industry). In addition, they may not yet have achieved the necessary scale to solidify their market position.

Context

This research is Gartner's third Magic Quadrant for Mobile Marketing Platforms. It reflects not only the significant growth of this product category, but also marketing leaders' increasing reliance on mobile marketing techniques for business advantage. While the last iteration of this Magic Quadrant included both stand-alone mobile marketing platforms and multichannel marketing hubs with native mobile marketing capabilities, this year's iteration focuses exclusively on stand-alone mobile marketing solutions. As such, our new assessment of this year's mobile-specific vendors resulted in some shifts in vendors' positioning along our Magic Quadrant.

Globally, consumers spend more of their digital time on smartphones than on desktops, laptops or tablets — with particular emphasis on apps. ¹ The impacts of COVID-19 have further catalyzed consumers' ongoing shift to digital and mobile solutions as consumers readjust the way they navigate their daily lives amid a new normal. ² This broad and rapid consumer adoption of smartphones breeds a dependency few technologies have ever enjoyed. As such, mobile marketing capabilities increasingly determine brand marketing success.

This Magic Quadrant is an assessment of vendor capabilities based on past execution in 2019 and future development plans over the next 12 months. However, it may only be valid at a particular point in time as vendors and the market continue to evolve. To that end, readers should not use this Magic Quadrant in isolation as a tool for vendor selection. When making specific tool selection decisions, use it in combination with our companion Critical Capabilities for Mobile Marketing

Platforms research, other Gartner research related to mobile marketing best practices and our analyst inquiry service.

Moreover, readers should be careful not to ascribe their own definitions of Completeness of Vision or Ability to Execute to this Magic Quadrant, which they often incorrectly map narrowly to product vision and market share, respectively. The Magic Quadrant methodology factors in a range of criteria in determining position, as shown by the extensive Evaluation Criteria section.

Three Trends Influence the Market for Stand-Alone Mobile Marketing Platforms

The market for stand-alone mobile marketing platforms, as well as vendors' current and planned capabilities, are being influenced by three key trends.

Trend 1: COVID-19 Creates Urgency for Advancing Mobile Marketing Maturity

Marketers are experiencing great urgency in developing advanced mobile marketing capabilities in 2020. The COVID-19 pandemic disrupted all aspects of modern life, but certain vertical markets historically dependent on physical locations and in-person interactions — such as retail, personal care services, travel and hospitality, and the restaurant industry — have been especially affected. Purpose-built mobile marketing platforms in the hands of mature marketing teams provided businesses and brands with the resiliency to adapt to the pandemic's evolving nature.

Many marketers leveraged mobile apps, SMS messaging and other mobile techniques to remain connected with their customers during this time. For many organizations in retail and QSR/fast-casual dining markets, mobile apps and mobile-optimized sites enabled marketing teams to continually drive customer demand, create opportunity for sales and provide flexible fulfillment options by adopting buy online, pickup in store (BOPIS) or curbside pickup. Teams are also deploying mobile messaging techniques that properly enable customers ordering through a mobile app or website to opt in to message threads that provide status updates on delivery or pickup times, reducing stress and costs on call centers. A number of vendors cited examples where they were able to help clients develop simple campaigns using push notifications or SMS messaging ranging from reminders about basic hygiene to sending time-critical messages to mobile users (i.e., employees working in stores or restaurants). Vendors such as Vibes and Plexure were able to provide mobile solutions for BOPIS.

However, it should be noted that those marketing teams that were able to use mobile to maintain operations were likely at a reasonably advanced marketing maturity level and were businesses that progressed reasonably far in (if not completed) their digital transformation. Gartner believes that those marketing teams that have attained at least an intermediate mobile marketing maturity are in a better position to handle marketing amid continued economic uncertainty.

Marketing teams with fairly low marketing maturity levels are a challenge for PBM vendors. Results from Gartner's interactive maturity assessment tool — which allows marketers to assess their overall digital marketing and/or individual channel maturity — noted a decided lack of mobile

marketing maturity in 2019 (see [Marketing Maturity Assessment: Marketers Lag in Multichannel and Operations Capabilities](#)).

Trend 2: Purpose-Built Mobile Marketing Platforms Extend Value of Multichannel Marketing Hubs

In the past year, Gartner has seen mobile marketing platform functionality evolve along two paths. Platforms following the first path aim to evolve their platform toward more of a mobile-centric version of an MMH, believing that digital marketing platforms, in general, and MMH platforms, in particular, need to rapidly mature their mobile capabilities. Vendors such as Braze have followed this path; its data- and analytics-centric mobile marketing platforms added a broader set of channel capabilities and integrations, ultimately arriving at a set of tools that maps to MMH capabilities (see their evaluations in Gartner's [Magic Quadrant for Multichannel Marketing Hubs](#)).

The second path is followed by vendors that have staked their business on a purely mobile-focused product and feature set. It's this group we focused on in this evaluation. The mobile capabilities of MMH vendors are evaluated in the Magic Quadrant for Multichannel Marketing Hubs. The PBM category underscores that rapid pace of change — 5G networks are ready to enable significant refinements to many smartphone experiences, particularly those associated with marketing tactics and strategies (see [2 Critical Areas of Focus for Marketers to Address Consumer Preferences for 5G](#)). MMH vendors have established mobile marketing capabilities, but, given their broader remit, they often don't lead in terms of specific mobile capabilities. Meanwhile, PBMs do lead in those core mobile marketing capabilities; for example, PBMs lead MMHs in the evolution of RCS protocols that enable richer SMS text messaging.

Marketing teams in the past two to three years have prioritized mobile, as noted in its position in marketing expense budgets in the 2020 CMO Spend Survey cited previously. Yet, many marketers still consider their mobile marketing capabilities immature. PBM vendors are in a position to elevate their clients' maturity, starting with helping marketing teams look at features and functionality as characteristics of a type of marketing strategy.

For most organizations, mobile marketing strategies fall within one of two types. Defining the mobile marketing type not only helps vendors and prospects prioritize mobile goals, but also helps determine the right mobile marketing platform for your needs (see [2 Types of Mobile Marketers: Which One Are You?](#)).

The two ways organizations can approach mobile marketing are “mobile-centric” and “mobile-extender.”

- **Mobile-centric** marketing organizations take advantage of the distinct capabilities of mobile devices and networks, such as cameras, GPS radios and microphones, to engage customers and prospects in compelling ways not possible using desktop techniques.
- **Mobile-extender** marketing organizations extend and adapt existing prospect and customer connections from the desktop to a mobile device. For example, a mobile-friendly version of the desktop website gets created, and mobile lead-generation tactics mirror those on the web.

By and large, both mobile-centric and mobile-extender organizations are underinvesting in their mobile marketing initiatives. It's not that digital marketing executives don't understand the value of mobile. It's that they don't start with identifying their mobile marketing type and devising a mobile strategy that meets the needs of all of their mobile-centric customers and prospects.

Trend 3: Analytics Drive Long-Term Value and Security Requirements as New Formats Expand MMPs' Remit

As with the past two iterations of this Magic Quadrant, mobile analytics and data exploration capabilities, which inform automated campaign orchestration and testing of major elements of a mobile campaign (i.e., offers, content, send-time logistics) are cornerstone differentiators for PBMs. In their role as stand-alone platforms or as an integrated solution within an MMH, customers value ease of use and appropriate levels of data granularity.

With the advent of customer data platforms (CDPs) as key first-party data repositories, marketing teams are increasingly looking for PBM vendors to have integrations with a wide array of CDP vendors, as well as incumbent CRM vendors. Beyond those core capabilities, PBM vendors need to ensure their unique analytics capabilities can seamlessly feed data into CDPs and other data sources to ensure customer profiles are as up to date as possible.

This year's evaluation noted that all vendors are either at or in the process of achieving SOC 2 Type 2 compliance. These standards describe how a company or technology platform safeguards customer data and how well those controls are operating. This type of certification is particularly important in terms of ensuring platforms do not put marketing teams at risk, since PBMs are generally considered to be data processors in terms of regional and U.S. state privacy regulations (e.g., GDPR and CCPA).

In addition to analytics and data security and privacy, this Magic Quadrant noted vendors addressing several capabilities that marketers are prioritizing. Among the most important are:

- **Industry and unique business requirements:** Vendors are developing specific capabilities and insights into their prospects' industry verticals and individual requirements. In the past year, end-user marketers have placed a premium on platform functionality, but also prize a vendor that understands both the industry vertical they are in and the specific issues facing the prospect's business. In response, some vendors have developed product-success teams and/or strategic partners. These customer success teams are platform support personnel; they typically work with clients to ensure they are fully leveraging the platform's capabilities.
- **Cross-channel engagement and personalization:** Mobile marketing platform vendors are demanding a lot of attention from marketers lately for their ability to extend these cross-channel and mobile personalization capabilities, which are either on all vendor roadmaps or in early stages of deployment.
- **New channels and formats:** With RCS, marketers can deliver a more "branded" experience for their SMS/text messaging campaigns. While rollouts by wireless carriers are somewhat uneven,

most mobile marketing platform vendors are supporting or bringing to market solutions to enable marketers to leverage the emerging RCS standard (backed by Google and wireless carriers). Most PBM vendors are also jockeying to support mobile marketing techniques for apps running on over-the-top set-top boxes (OTT/STBs). This extension is motivated by marketers seeking to extend their reach of mobile messaging techniques to the smartphone apps consumers use with their OTT devices.

Market Overview

Consumer demand for mobile engagements creates new, identifiable and predictable moments of opportunity, and sophisticated marketers are capitalizing on them. Marketing leaders surveyed in Gartner's 2020 CMO Spend Survey allocate, on average, 9.8% of total marketing expense budgets to mobile marketing, with 70% of CMOs expecting to increase this investment in 2021 (see [2020 CMO Spend Survey, Part 2: CMOs Protect Digital Channels and Martech \(for Now\)](#)). Previous Gartner research reveals that mature multichannel marketers spend more on mobile marketing than their less mature peers.³ Additionally, Gartner's 2019 Marketing Technology Survey revealed that 68% of marketing respondents have or are currently in the process of deploying a mobile marketing platform (see [Marketing Technology Survey 2019: Marketers Boost Martech Efficacy Through Disciplined Planning and Collaboration With IT](#)).

Evidence

Gartner's 2020 CMO Spend Survey: The purpose of this survey is to understand the marketing priorities and budget allocations of marketers to help clients benchmark, allocate spend and prioritize. The research was conducted online from March 2020 through May 2020 among 432 respondents in the United States (44%), Canada (8%), France (12%), Germany (11%) and the United Kingdom (25%). Respondents were required to have involvement in decisions pertaining to setting or influencing marketing strategy and planning, as well as have involvement in aligning marketing budget/resources. Eighty-four 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 (55 respondents), high tech (49 respondents), manufacturing (68 respondents), consumer products (44 respondents), media (50 respondents), retail (55 respondents), healthcare providers (38 respondents), IT and business services (27 respondents), and travel and hospitality (46 respondents).

The survey was developed collaboratively by a team of Gartner analysts who follow marketing and was reviewed, tested and administered by Gartner's Research Data and Analytics team.

Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.

Gartner's 2019 Marketing Technology Survey: Results presented are based on a Gartner study to understand how marketers are investing in, deploying and getting value out of technology. The primary research was conducted online from August 2019 through September 2019 among 418

respondents in the United States (45%), Canada (7%), France (11%), Germany (12%) and the United Kingdom (25%). 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 (56 respondents), high tech (30 respondents), manufacturing (102 respondents), consumer products (38 respondents), media (31 respondents), retail (47 respondents), healthcare providers (37 respondents), IT and business services (40 respondents), and travel (37 respondents). Respondents were required to have involvement in decisions pertaining to setting or influencing marketing technology strategy.

The survey was developed collaboratively by a team of Gartner analysts who follow marketing and was reviewed, tested and administered by Gartner's Research Data and Analytics team.

Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.

Gartner Peer Insights reviews for "Mobile Marketing Platforms." We considered reviews for Gartner Peer Insights "Mobile Marketing Platforms" posted from July 2019 through July 2020.

¹ [Global State of Mobile](#), Comscore (download required).

² [Increased Media Device Usage Due to the Coronavirus Outbreak Among Internet Users Worldwide as of March 2020, by Country](#), Statista.

³ [Survey Analysis: Mature Multichannel Marketers Prioritize Mobile Investment, Activation and Data](#), Gartner.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market

dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Document Revision History

[Magic Quadrant for Mobile Marketing Platforms - 15 July 2019](#)

[Magic Quadrant for Mobile Marketing Platforms - 12 July 2018](#)

Recommended by the Authors

[How Markets and Vendors Are Evaluated in Gartner Magic Quadrants](#)

[Survey Analysis: Multichannel Marketing Hub, Mobile Marketing Platform or Both?](#)

[Magic Quadrant for Multichannel Marketing Hubs](#)

[Mobile Marketing Maturity: Moving From the Developing Level to the Advanced Level](#)

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