

Spotlighting 2018 Martech Innovators

Research, Writing and Analysis by
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Marketing and Madtech Research



**The
Relevancy
Group**

Spotlighting 2018 Martech Innovators



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Topics Covered: Identity Management, Data Matching, Email Marketing, Data Management, Personalization, Individualization, Email Deliverability, Artificial Intelligence, Real-Time Data

Coverage Areas: Marketing, Madtech

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Key Questions:

- Which martech vendors stand out as innovators in 2018?
- How do these vendors address marketer challenges and aspirations?
- Where are these vendors headed in the next 12 months?



Martech Innovators That Stood Out in 2018

Each year The Relevancy Group takes hundreds of briefings with enterprise vendors and category innovators. Our research touches on vendors across the martech and adtech (Madtech) sector, many of which whom we enjoy a client relationship. At the end of 2018, our analysts nominate vendors that they thought were particularly innovative. This year we are recognizing four vendors that stood out to us in 2018. The 2018 Martech Innovators are LiveRamp, MessageGears, OneSpot, and Return Path. We recognize these vendors for their unique and innovative approach to delivering solutions that optimize and digitally transform their client's businesses. The four martech innovator solutions complement each other as well as meet marketer challenges and aspirations. In 2018 marketers aspired to utilize more real-time data, improve their relevancy through more individual targeting, improve the integration and data management, optimize email deliverability and the customer experience. These vendors address one or more of these ambitions. Continuing to add AI/ML (Artificial Intelligence/Machine Learning) capabilities is a universal development that we expect to see from these innovators in 2019.

For more information on The Relevancy Group LLC

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Background: LiveRamp’s roots go way back to 2007, but the company as we know it today was founded in 2010 to help marketers more efficiently and effectively reach customers and prospects online. The company celebrated its emergence as a standalone company and relisted on the NYSE as RAMP on October 2nd of this year. LiveRamp is headquartered in San Francisco and maintains multiple offices throughout the US, Europe, and APAC.

About: IdentityLink and AbiliTec are the two products that comprise the LiveRamp platform. The core product, IdentityLink is an identity resolution service that ties online data back to real people and enables marketers to execute personalized messaging across online and offline channels. AbiliTec is offline PII resolution technology, which helps marketers resolve data across systems and unify them for marketing purposes.

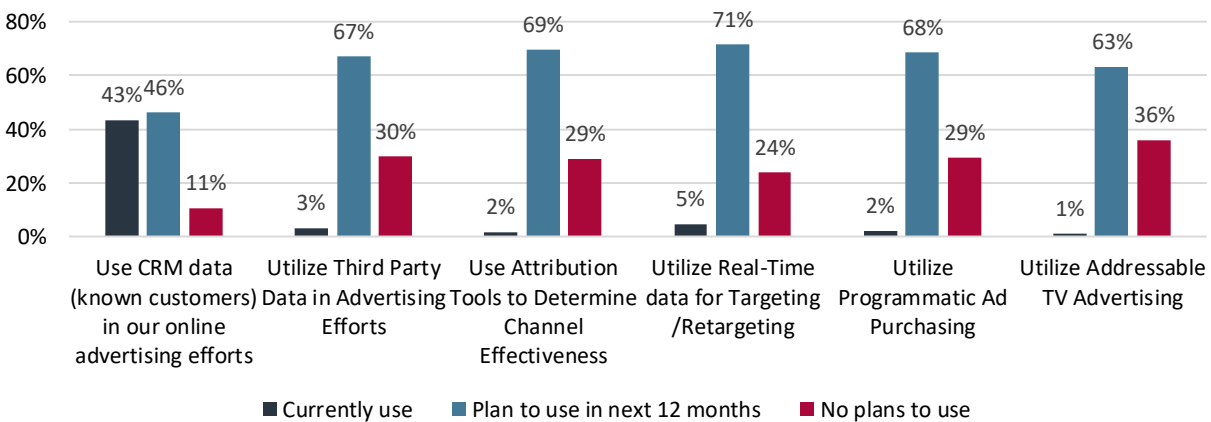
What’s innovative for the marketer? Most savvy marketers today are focused on driving valuable, cohesive, and highly relevant campaigns across channels, networks, and devices, but many struggle to accomplish this goal. By using LiveRamp’s identity management and resolution products to onboard customer data, marketers can target their customers and prospects with personalized online advertising in social networks and across the web, and begin to drive coordinated, personalized online journeys. Bridging the gaps between online and offline data also contributes to better measurement of marketing and advertising efforts and can help markets create more complete and useful customer profiles. See “Reaching Subscribers Beyond the Inbox - Bridging the Gap Between Offline and Online Data” for more detail.

Clients Include: Uber, GM, Comcast, TiVo, United Airlines, 20th Century Fox

Primary and Ideal Industries: Travel, Media & Publishing, Financial, Retail & Ecommerce, CPG

What we expect to see in 2019: We expect the marriage of martech and adtech to deepen in 2019 and expect to see more stewards of first-party data engaging with LiveRamp to help them better target, personalize, measure, and scale their data-driven marketing efforts.

Figure 1. LiveRamp Positioned to Address Key Online Tactics Employed by Email Marketers



Question: From the following list please indicate which tactics you currently use, plan to use, or have no plans to use in the next 12 months.
 Source: The Relevancy Group Executive Survey n=406, 6/18, U.S. Only.

Background: Founded in 2010 and based out of Atlanta Georgia, MessageGears is an aggressive fast-growing ESP (Email/Everychannel Service Provider). In 2016 Roger Barnette joined as CEO. Since that time MessageGears has taken a series B round of funding, moved to a new office, signed significant clients and made key hires in all facets of the business.

About: MessageGears is an ESP hybrid solution that works off real-time live data. This hybrid solution allows clients to keep their data behind a firewall and under their control simply by connecting the on-premises application to a cloud solution. Data and campaign creation lives where the marketer’s data lives. There is no syncing or moving data, which makes MessageGears different than traditional ESPs.

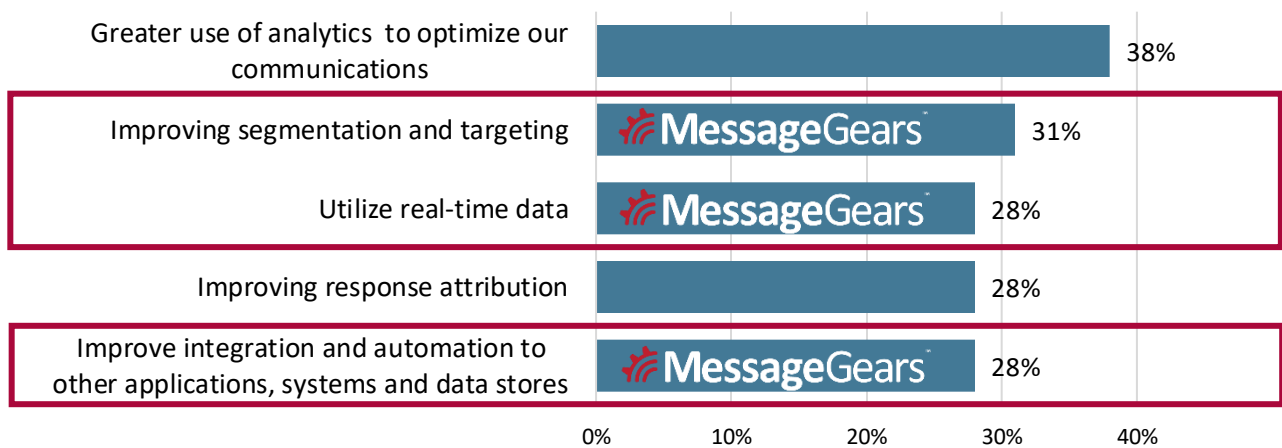
What’s innovative for the marketer? Their ability to not replicate data offers tremendous cost savings and as such MessageGears offers unique, fair pricing packages. The marketer is working off live data in their own data repository, which provides limitless real-time data marketing opportunities. This innovative data management approach makes MessageGears unique and aligns well with email marketer aspirations. In our 2018 ESP Enterprise Buyer’s Guide, MessageGears earned the highest client satisfaction scores in the areas of Product Innovation, Infrastructure/Stability, Account Management, Technical Services, Integration, Technical, and Customer Support. See [“The Relevancy Ring, ESP Buyer’s Guide 2018 – Enterprise Edition”](#)

Primary and Ideal Industries: Travel, Financial, Retail, Marketing Automation.

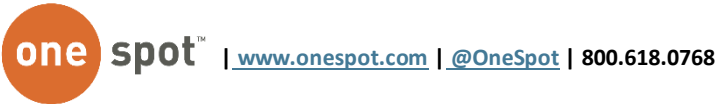
Clients Include: AmTrust Financial, Asics, Chick-fil-A, Expedia, Orbitz Worldwide, Shopstyle

What we expect to see in 2019: We expect to see MessageGears tap into external AI/ML (Artificial Intelligence and Machine Learning) personalization tools and add everychannel execution capabilities.

Figure 2: MessageGears is Well Equipped to Address Three Out of The Top Five Email Marketing Priorities



Question: What are your top five priorities for improving the ROI of your email marketing programs in 2018? (Select one)
 Source: The Relevancy Group Executive Survey n=215 2/18 U.S. Only.



Background: Founded in 2013 and based out of Austin Texas, OneSpot is a leading firm that utilizes AI/ML to drive the advancement of individualized experiences. Led by CEO Steve Sachs, OneSpot continues to drive their latest capital investment to support their fast-growing business.

About: OneSpot is an AI-based email and website individualization platform and analytics solution. OneSpot’s system is self-contained from a data perspective. The platform collects the bulk of the data it uses from the customer’s website.

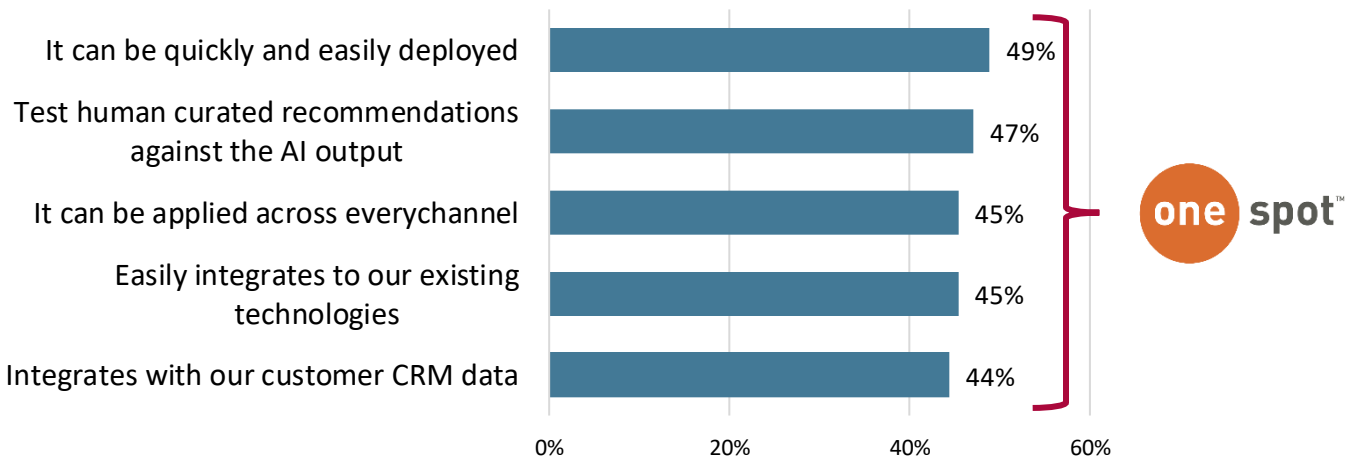
What’s innovative for the marketer? Their only integration requirement is a script tag that is placed on the website. Using only this tag, content is ingested into the OneSpot system. Content engagement is tracked and for web individualization, content is served back into the site in an intelligent way based on the data. For email individualization, content is injected into the email message via the customer’s ESP. The OneSpot platform is built to select the most relevant piece or set of content and/or products for a user at a specific point in time. Instead of selecting content for one big list, several broad segments or detailed micro segments, the system selects content for each recipient individually based on all available data, as well as any contextual signal or topic provided by the campaign manager or other platforms. We love how easy OneSpot is to use and the results that they are returning are fantastic. For more information see [“AI Market Spotlight Guide 2018”](#).

Primary and Ideal Industries: Health and Fitness; CPG – Food, Beauty; Financial Services.

Clients Include: Ally, Campbell’s, Delta, Nestle, Norton, Quicken Loans, Santander, Unilever

What we expect to see in 2019: We expect to see OneSpot continue to advance and perfect their AI/ML (Artificial Intelligence and Machine Learning) algorithms and roll out additional dashboards.

Figure 3: OneSpot Addresses All of The Top Five Considerations in The Selection of Personalization Technology



Question: From the following questions, select how important these items are in your selection of personalization and recommendation technologies? Selected “Extremely Important” Source: The Relevancy Group Executive Survey n=401, 2/18 U.S. Only

Return Path | www.returnpath.com | [@OneSpot](https://twitter.com/OneSpot) | 866.362.4577

Background: Founded in 1999 and based out of New York, NY, Return Path are experts in deliverability and driving results for email marketing. Led by CEO Matt Blumberg, Return Path has been making significant AI-based product investments for the last 10 years.

About: EmailDNA is in the foundation of all Return Path solutions. Using the industry’s most comprehensive set of email data, along with their advanced analytics capabilities, Return Path employs deeper learning to solve marketing problems in unique, innovative ways, whether it’s for delivery personalization, efficiency gains or analyzing data for insights.

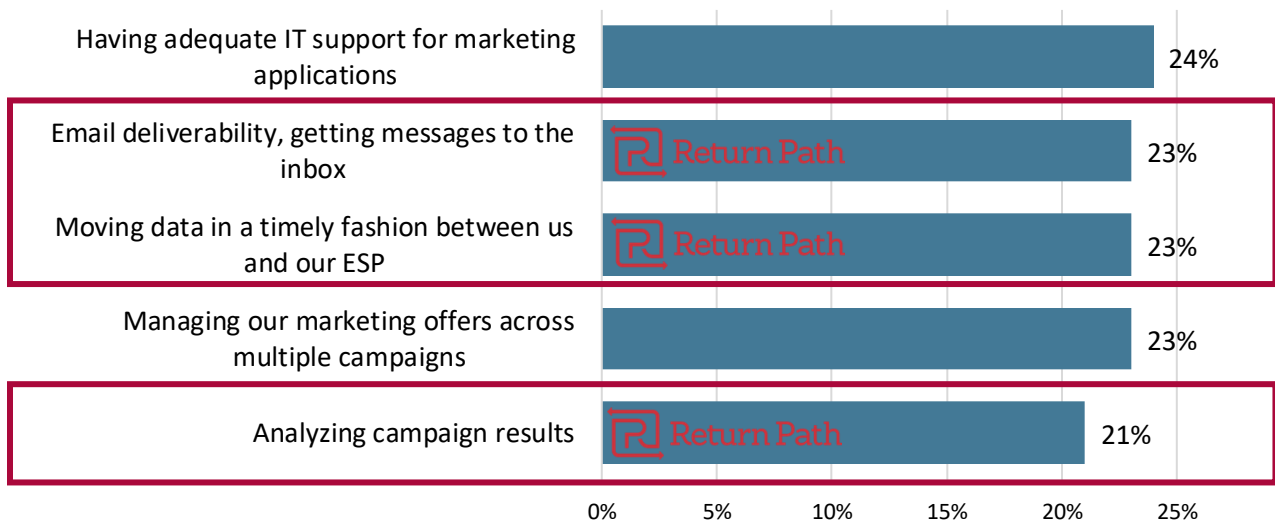
What’s innovative for the marketer? Return Path has a robust set of predictive models that manage message anomaly and phishing detection, as well as classify messages, where results are available in the Return Path platform. We were impressed in the way that they utilize AI in their Inbox Insight competitive intelligence offering when they process email creative to redact PII personalized data. Return Path is delivering innovation in the form of their engagement models that build ISP-specific deliverability models and have returned tremendous optimization gains, particularly for Gmail. We are impressed Return Path’s commitment to embrace AI, test its many applications, and deliver real innovation for their clients. For more information see [“AI Market Spotlight Guide 2018”](#).

Primary and Ideal Industries: Anyone that sends marketing emails. Retailers account for most of their clients.

Partner Clients Include: Cheetah Digital, Epsilon, Emarsys, Salesforce, Selligent, Zeta Global

What we expect to see in 2019: We expect to see ReturnPath continue to advance and perfect their AI/ML (Artificial Intelligence and Machine Learning) algorithms to improve insights and marketer efficiencies.

Figure 4: Return Path Is Well-Equipped to Address Three of The Top Five Email Marketing Challenges



Question: What are your greatest challenges when developing email marketing campaigns? (Select all)

Source: The Relevancy Group Executive Survey n=401 2/18, n=215 2/18 U.S. Only.

About The Methodology:

In 2018 The Relevancy Group conducted briefings with these vendors and some participated in our buyer's or market landscape spotlight guides that contained questionnaires and in some instance's client reference interviews. Survey data referenced came from a February 2018 executive survey that resulted in 401 completed and qualified U.S. marketers. We qualified respondents based their familiarity with their marketing program, their email sending volume and customer database size. Respondents self-identified their company size, title and additional attributes such as industry,

About The Relevancy Group: www.relevancygroup.com | (877) 972-6886 | info@therelevancygroup.com

Founded in 2010 and led by tenured industry analyst and marketer David Daniels, The Relevancy Group (TRG) provides market research and advisory services. Measuring consumer and executive behaviors, TRG combines original and thought-provoking market research with unrivaled advisory services to help buyers and sellers alike to compete more effectively and navigate digital transformation. We are a trusted advisor to leading technology vendors and familiar brands. TRG delivers a series of original research, custom research, lead generation and advisory services. Our Relevancy Ring Buyer's guides are highly sought after and have been proven to help marketers and vendors alike.

We also publish the digital magazine for marketers by marketers, [The Marketer Quarterly](#). Free with registration online, and through the [MQ apps](#) on iTunes, Google Play and Amazon. Follow [@TMQ_Magazine](#)

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As CEO of The Relevancy Group, David directs market research and advisory services essential to digital marketing. Direct Magazine said David is "one of the most influential experts in email marketing, if not the most influential." In 2017 David was named Email Marketing Thought Leader of The Year by the DMA's email experience council. Co-author of the book '*Email Marketing An Hour A Day*', David has held senior level positions at Forrester, JupiterResearch, Apple, Anthropologie and other top brands. David is also the President and Publisher of [The Marketer Quarterly](#) a digital magazine and app for marketers by marketers available for free with registration online and the MQ App via the [app stores](#).