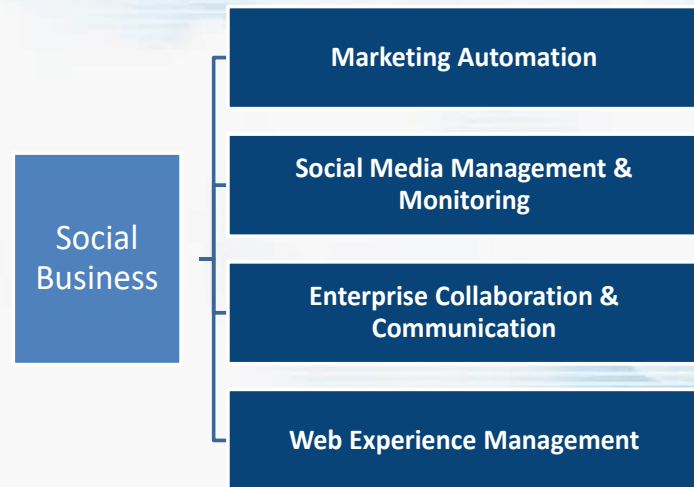




Social Business

This Market Monitor overview report on the Social Business marketplace reflects updated market and vendor estimates through Q3 2016. Using the broadest definition, the Social Business market consists of the following segments: Information Governance – Privacy & Compliance and Data Discovery, Enterprise Collaboration & Communication, EMC & File Sharing, Workforce Management, Marketing Automation, CRM & Customer Support, Social Media Monitoring & Management, Web Experience Management and Digital Commerce. This report provides a granular analysis of the Marketing Automation, Social Media Monitoring & Management, Enterprise Collaboration & Communication, and Web Experience Management segments. Going forward, we will be expanding our coverage of the market to include more of the aforementioned segments.

This report leverages 451 Research's deep knowledge of and relationships within the Social Business market, resulting in a proprietary forecast based on a bottom-up analysis of 152 vendors' current revenue and growth expectations through 2020. Included in the report is our Social Business taxonomy, market-sector revenue estimates, growth forecasts and a view of the competitive landscape for each of the sectors outlined above.



Greg Zwakman
VP, Market and
Competitive Intelligence

Kathleen Frodyma
Associate Analyst,
Quantitative Services

Sheryl Kingstone
Research Director, Business
Applications

Melissa Incera
Senior Research Associate
Business Applications

Table of Contents

[Methodology](#)

[Data Sources](#)

[Social Business Market Taxonomy](#)

[Social Business Sector Definitions](#)

[Social Business Sector Definitions](#)

[Vendor Participation by Sector \(5 Slides\)](#)

[Total Social Business Market Revenue](#)

[Social Business Segment Revenue](#)

[Social Business Segment Market Share Analysis](#)

[Vendor Revenue Distribution \(Ownership\)](#)

[Vendor Revenue Range Details](#)

[Vendor Revenue Range Details \(Cont.\)](#)

[Vendor by Total Social Business 2015E Revenue Range](#)

[Vendor by Total Social Business 2015E Revenue Range \(Cont.\)](#)

[Social Business Vendor Distribution](#)

[Social Business End-User Segment Revenue](#)

[Social Business Market Share by End-User Segment](#)

[Marketing Automation Segment Definition](#)

[Total Marketing Automation Market Revenue](#)

[Marketing Automation \(MA\) Vendors](#)

[MA Vendor Distribution \(Public/Private\)](#)

[MA Vendor Distribution by Revenue Range](#)

[MA Vendor Distribution](#)

[MA End-User Segment Revenue](#)

[MA Market Share by End-User Segment](#)

[MA Vendors by End-User Focus](#)

Table of Contents

[Social Media Management & Monitoring \(SM3\) Definition](#)

[SM3 Market Highlights](#)

[SM3 Vendors](#)

[SM3 Vendor Distribution \(Public/Private\)](#)

[SM3 Vendor Distribution by Revenue Range](#)

[SM3 Vendor Distribution Summary](#)

[SM3 End-User Segment Revenue](#)

[SM3 Market Share by End-User Segment](#)

[SM3 Vendors by End-User Focus](#)

[Enterprise Collaboration & Communication \(EC&C\) Definition](#)

[EC&C Market Highlights](#)

[EC&C Vendors](#)

[EC&C Vendor Distribution \(Public/Private\)](#)

[EC&C Vendor Distribution by Revenue Range](#)

[EC&C Vendor Distribution Summary](#)

[EC&C End-User Segment Revenue](#)

[EC&C Market Share by End-User Segment](#)

[EC&C Vendors by End-User Focus](#)

[Web Experience Management \(WEM\) Sector Definition](#)

[WEM Market Highlights](#)

[WEM Vendors](#)

[WEM Vendor Distribution \(Public/Private\)](#)

[WEM Vendor Distribution by Revenue Range](#)

[WEM Vendor Distribution Summary](#)

[WEM End-User Segment Revenue](#)

[WEM Market Share by End-User Segment](#)

Table of Contents

[WEM Vendors by End-User Focus](#)

[Vendor Analysis Methodology](#)

[Marketing Automation Summary Results](#)

[Marketing Automation Drill-Down Results](#)

[Enterprise Collaboration/Social Summary Results](#)

[Enterprise Collaboration/Social Drill-Down Results](#)

[Social Media Management & Marketing Summary Results](#)

[Social Media Management & Marketing Drill-Down Results](#)

[Web Experience Management Summary Results](#)

[Web Experience Management Drill-Down Results](#)

[Social Business Summary Data](#)



152

Vendors included in analysis are estimated and forecasted individually

Our Social Business database contains individual models on 152 vendors in the market. Each model contains intelligence specific to that company (i.e., customers, pricing, deal sizes and trends) with a forecast that incorporates the unique traits, strengths and weaknesses of the vendor.

100%

Of market estimate and forecast based on individual vendor estimates, no black-box ‘other’ category

A bottom-up analysis entails creating individual estimates and forecasts for each market participant in lieu of relying on historical or related data, applying broad assumptions or extrapolating market totals based on input from a handful of large vendors (a top-down approach).

8 out of 10

Vendors we have briefed directly to support our findings

This analysis leverages our deep knowledge of and relationships within the Social Business marketplace, resulting in proprietary forecast of industry revenue based on a bottom-up analysis of each vendor’s current revenue and growth expectations.

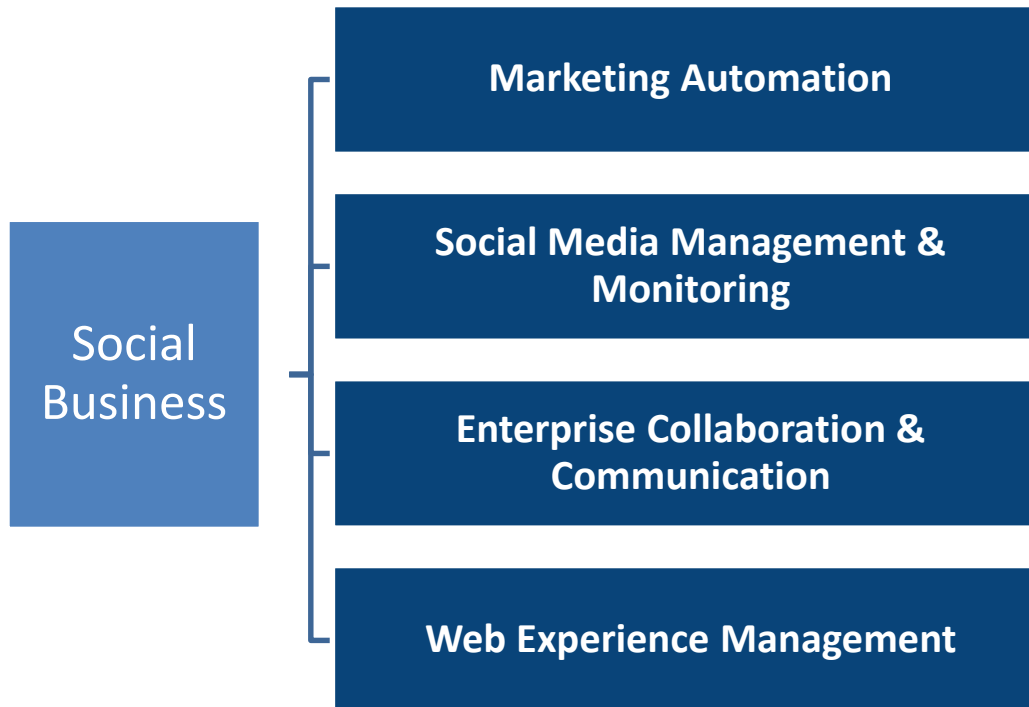


15,000	Vendor briefings as a company annually
85+	Sector analysts support estimates
12	Financial analysts contribute to MM
950+	Financial/banking clients provide insight
CXO	Executive-level access across IT landscape





Using the broadest definition, the Social Business market consists of following segments: Information Governance – Privacy & Compliance and Data Discovery, Enterprise Collaboration & Communication, EMC & File Sharing, Workforce Management, Marketing Automation, CRM & Customer Support, Social Media Management & Monitoring, Web Experience Management, and Digital Commerce. This report provides a granular analysis of the Marketing Automation, Social Media Monitoring & Management, Enterprise Collaboration & Communication, and Web Experience Management segments. Going forward, we will be expanding our coverage of the market to include more of the aforementioned segments.



* Additional sectors will be added to the analysis in future iterations



Marketing Automation

Technology to create and manage multi-channel, data-driven marketing workflows that analyze and segment customer interactions to meet business goals. Specifically, a Marketing Automation offering will have the ability to create, manage and execute workflows designed to attract, identify and begin the qualification of sales leads, or help segment existing or new customers and direct them toward specified campaign goals.

Social Media Management & Monitoring

As social media has become a more mature part of the overall digital marketing mix, the tools to manage such presences for organizations have become more established in the CMO's office. There are broadly four predominant sets of use cases that surround social media tools: monitoring, measurement, management and marketing. There is naturally a fair degree of crossover between them. Monitoring is centered on trying to understand the discussions that might be taking place on a set of subjects across a defined set of social media channels. For example, what mentions – explicitly or otherwise – has a brand had on Twitter in the last 24 hours? Are these mentions increasing or decreasing in volume or tonality? Measurement starts with much the same tooling. Rather than looking for tactical approaches to what is occurring right now, it instead aims to understand the longer-running effects of a set of circumstances, perhaps around a campaign. Social media marketing tools allow users across time zones to manage the wide variety of accounts a large enterprise might require, with a single platform to record and manage, bringing some real information governance practices to social media.



Enterprise Collaboration & Communication

The marketplace for enterprise collaboration tools is crowded and populated by a range of vendors that on the surface may look dissimilar, but they all bring a human dimension to business applications. The marketplace includes tools that support multiple people working on the same process, task or file – tools that can also allow project teams that are physically remote from one another to be monitored and managed. Some vendors provide access to corporate files anywhere, anytime; others provide real-time video, voice or text discussion. What differentiates these technologies from earlier ‘unified communication’ tools is that they are linked to specific work tasks and processes. However, the marketplace is going through considerable consolidation and reinvention, and we continue to see new entrants emerge with novel and potentially disruptive approaches to traditional collaborative working methods.

Web Experience Management

Web Experience Management (WEM) is the name for a set of technologies designed to build and manage web publishing channels. These tools allow people to construct websites, write content and manage the flow and publishing of content to multiple channels such as mobile, social and web locations, as well as administrate and manage access and navigation across content and data. Over the past couple of years, many vendors have rebranded their wares under the term Web Experience Management (or variations thereof), emphasizing the personalization and monitoring of web and mobile interactions. Although there are many stand-alone WEM systems available, many digital marketing products also provide some form of WEM capability as standard.

Greg Zwakman

greg.zwakman@the451group.com
415-989-1555 x326

Tim Miller

tim.miller@the451group.com
415-989-1555 x333

Yulitza Peraza

yulitza.peraza@the451group.com
415-989-1555 x317

Kathleen Frodyma

kathleen.frodyma@451research.com
415-989-1555 x331

Andrew Waetzig

andrew.waetzig@451research.com
415-989-1555 x334

Or sales@the451group.com

The 451 Group

NEW YORK · BOSTON · SAN FRANCISCO · WASHINGTON DC · SEATTLE · DENVER
LONDON · MOSCOW · DUBAI · SÃO PAULO · SINGAPORE · TAIPEI