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The Forrester Wave™: Social Listening Platforms, Q3 2018

The 10 Providers That Matter Most And How They Stack Up

by Jessica Liu and Arleen Chien
August 21, 2018

Why Read This Report

In our 40-criteria evaluation of social listening platforms, we identified the 10 most significant ones — Brandwatch, Crimson Hexagon, Digimind, Linkfluence, NetBase, Sprinklr, Synthesio, Sysomos, Talkwalker, and Zignal Labs — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals make the right choice.

Key Takeaways

Sprinklr, NetBase, And Synthesio Lead The Pack
Forrester's research uncovered a market in which Sprinklr, NetBase, and Synthesio are Leaders; Crimson Hexagon, Digimind, Talkwalker, Sysomos, and Brandwatch are Strong Performers; Linkfluence and Zignal Labs are Contenders.

Users Across The Enterprise Want Social Insights
The social listening platforms market is growing as more companies adopt social intelligence to quickly address consumer insights challenges. B2C marketing pros and peers across the enterprise increasingly turn to social listening providers for competitive intelligence, trend tracking, and brand protection.

A Vendor's Strategy Is A Key Differentiator
As social listening technology becomes more commoditized, buyers will find differentiation in vendors' vision and strategy. Leading vendors articulate and enable a future in which their solution seamlessly integrates with and amplifies clients' existing marketing technology (martech) stacks, and their services help companies get more from their social investment.

FOR B2C MARKETING PROFESSIONALS

The Forrester Wave™: Social Listening Platforms, Q3 2018
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with Brigitte Majewski, Miriam Oesterreich, and Christine Turley
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Enterprises Are Still Not Using Social Intelligence To Its Full Potential

The future of social intelligence is in the enterprise, not just marketing.[1] Years ago, Forrester established that social intelligence's true value lies in its ability to provide consumer insights for use cases across diverse business units including marketing, customer service, market research, product development, risk and reputation management, human resources, creative development, media planning — and the list goes on.[2] Forrester defines this technology:

> *Social listening platforms manage and analyze customer data from social sources and use that data to activate, measure, and recalibrate marketing and business programs.*
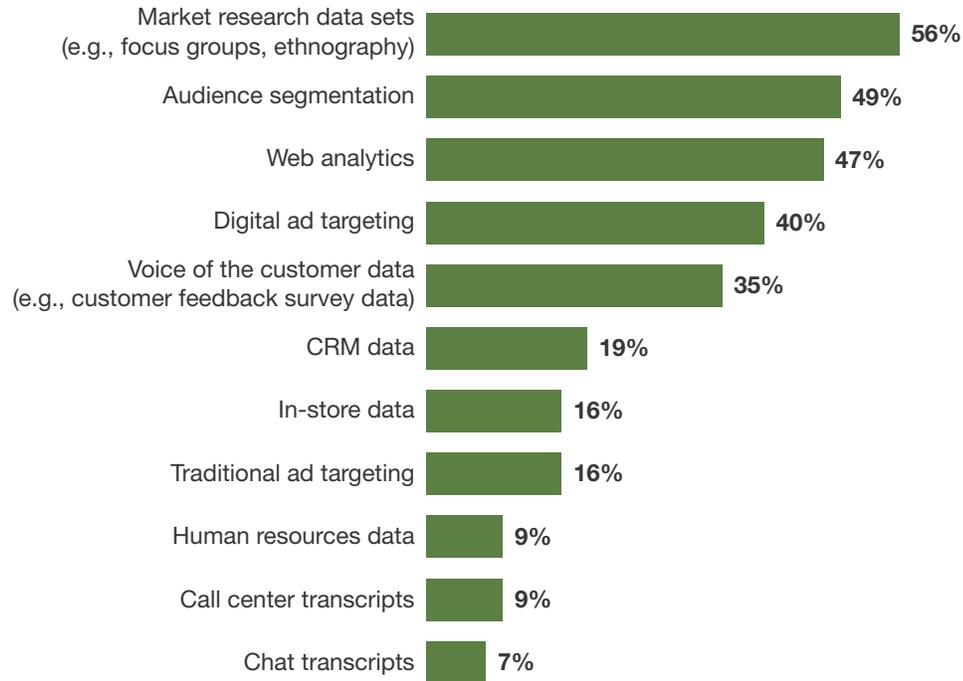
In our 2016 Forrester Wave™ evaluation of social listening platforms, we acknowledged that the technology had great potential, but its heyday was still to come.[3] We're still holding our breath in 2018. Despite companies' eagerness to combine social data with other data sources and apply it to far-reaching use cases, marketing still primarily owns and uses social data in a silo. Client references predominantly combine social listening data with other marketing data such as market research, audience segmentation, and digital ad targeting (see Figure 1). Social listening platforms are actively trying to advance the social intelligence agenda by investing in stronger analytics, deeper tech integrations, machine learning (ML), and products that facilitate cross-enterprise usage. As a result, competitive differentiation comes less from their current tech offerings and more from the ability to provide strategic guidance and drive social intelligence programs across customers' enterprises.

FIGURE 1 Brands Predominantly Combine Social Data With Other Marketing Data

"Do you integrate and apply social data from your social listening platform to any of the following?"
(Multiple responses accepted; not all responses shown) (Select all that apply)

Market research data sets (e.g., focus groups, ethnography)	**56%**
Audience segmentation	**49%**
Web analytics	**47%**
Digital ad targeting	**40%**
Voice of the customer data (e.g., customer feedback survey data)	**35%**
CRM data	**19%**
In-store data	**16%**
Traditional ad targeting	**16%**
Human resources data	**9%**
Call center transcripts	**9%**
Chat transcripts	**7%**

Base: 43 respondents
Source: Forrester's Q2 2018 Global Social Listening Platforms Forrester Wave™ Customer Reference Online Survey

Social Listening Platforms' Current Offerings All Look Alike

Each social listening platform provider emphasizes its unique applicability and use across the enterprise. But each vendor also parades a roster of features and functionalities that largely look the same from one to the next. Buyers will struggle to distinguish major differences between each vendor's current offering because social listening platforms all:

› **Rely on the same data sources as the foundation of their platforms.** While social listening platforms tout their varying levels and types of data access, they are ultimately handcuffed by what the social networks decide to make available via their APIs and "exclusive" partnerships — which are in flux as networks grapple with increasing concerns about data privacy.[4] Yes, social data coverage

has expanded since our last Forrester Wave report, but beyond social networks, most vendors in this evaluation tap into the same third-party aggregators such as webhose.io for web content, LexisNexis or Factiva for news, and TVEyes for broadcast television. Social listening platform shoppers may find the breadth of data sources an important selection factor, but the discernment of data differentiation becomes increasingly difficult when all vendors source from the same well.

› **Offer an identical family of products.** In addition to a core social listening offering, most social listening platforms go to market with a complementary quick search product, a tool for deeper audience analysis, an API to port data out of the platform, and a display command center to visualize activity. This product collection encourages usage across the enterprise. Quick search products allow non-power users to easily explore social data for diverse use cases such as a C-suite executive getting a quick read on a trending topic. Audience tools let users understand consumer demographics, behaviors, and affinities to further product innovation, creative development, media planning, and more. APIs facilitate data flow and integration across systems. And display functionalities feed social command centers and enable insights distribution on a big screen.

› **Are gunning to incorporate machine learning.** Today's tech landscape is riddled with vendors touting AI capabilities. True AI-enabled solutions aim to mimic humans' abilities to sense the world around them, reason through this information, and then take appropriate action.[5] Social listening platforms "sense" and "think" by applying machine learning — a type of AI — to text and visual data, but their ability to "act" is limited. Features such as anomaly detection and alerting begin to crack the nut and some vendors use deep learning, a form of ML, to tease out complex elements like sentiment and emotion. Brands should be wary of over-exuberant AI promises and understand that social listening platforms still require humans to train the data in a semi-supervised environment before becoming operational.

The Next Frontier: Social Listening Platforms Differentiate With Strategy

Where social listening platforms lack differentiation on current offering, they make up for in varying strategic visions (even if the vision has not yet come to fruition in the technology) and services. Client references tell us that they won't leave their current platform because "our current provider knows our business too well," validating that intangibles like strategic guidance, strong account management, and abundant professional services keep customers "sticky."[6] To remain competitive, social listening platforms will pursue one of three paths:

› **Become the foundational social tech within a social suite.** Social listening insights inform social ad targeting, content publishing decisions, and social customer care prioritization. Uniting social capabilities into one common suite equips marketers to deliver consistently across these core social needs. Such benefits are evident among vendors such as Sprinklr and Sysomos, which address this market need.[7] More than a third of client references would consider switching social listening platform providers to consolidate their social marketing needs.[8] They tell us that their RFP process for a social listening platform oftentimes starts with a search for a tool that can deliver both listening and publishing.

› **Join forces with business intelligence platforms.** Unlocking full enterprisewide social intelligence requires that enterprises break social data out of its silo. Companies are taking initial steps to export social data into other enterprise systems to combine it with non-social data to drive new insights. A retailer we spoke with emphasized the importance of being able to consolidate social listening data with its own call center data, sales metrics, and marketing performance data for a 360-degree view of its customer and business. Vendors like Crimson Hexagon and NetBase emphasize the importance of combining social data with other data types, and all vendors in this evaluation, including Digimind, Linkfluence, and Zignal Labs, integrate with common business intelligence platforms Tableau and Domo.

› **Incorporate rigorous consulting or agency-like professional services.** Displaying social data is table stakes for social listening platforms; interpreting that data requires additional effort. As a result, vendors add on professional services from baseline reporting and analysis to sophisticated guidance on how to apply social data throughout the enterprise. A vendor's investment in robust strategic partnerships, consulting services, and people who learn and cater to customers' data objectives form a competitive edge. Almost every client reference we spoke with cited professional or strategic services as a reason for vendor customer satisfaction (or dissatisfaction). Vendors like Brandwatch and Synthesio offer staffing resources to embed into or support customers' organizations. And Talkwalker partners with notable consultancies and agencies to supplement its lighter professional services capabilities.

Social Listening Platforms Evaluation Overview

To assess the state of the social listening market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top social listening platforms. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 40 criteria, which we grouped into three high-level buckets:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include data sources, data quality, data processing, reporting, platform functionality, and integrations.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated customer strategy, product strategy, and pricing strategy.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, customer base, and customer growth rate.

Evaluated Vendors And Inclusion Criteria

Forrester included 10 vendors in the assessment: Brandwatch, Crimson Hexagon, Digimind, Linkfluence, NetBase, Sprinklr, Synthesio, Sysomos, Talkwalker, and Zignal Labs. Each of these vendors (see Figure 2):

› **Provides end-to-end social listening technology with a focus on self-service.** The vendors we included all offer end-to-end social listening technologies that allow users to collect, process, and analyze data from social sources. Though these vendors offer managed services, at least 70% of their clients utilize them in a self-service model.

› **Has a proven track record of revenue in social listening technology.** The vendors in this evaluation earned at least $15 million in revenue from their social listening technology in 2017.

› **Serves enterprise companies.** Each vendor we included in this evaluation has a customer base with more than 100 enterprise clients. Forrester defines enterprise-sized clients as those with $1 billion or more in revenue or with 1,000 or more employees.

FIGURE 2 Evaluated Vendors And Product Information

Vendor	Products evaluated
Brandwatch	Analytics Audiences Vizia
Crimson Hexagon	Crimson Hexagon Platform (HelioSight and ForSight)
Digimind	Digimind Social
Linkfluence	Radarly Search
NetBase	NetBase Pro NetBase Enterprise NetBase Instant Search
Sprinklr	Sprinklr Research Cloud
Synthesio	Social Intelligence Suite
Sysomos	Sysomos Search Sysomos Listen Sysomos Discover
Talkwalker	Talkwalker
Zignal Labs	Zignal Enterprise Platform Zignal Discover

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Vendor Profiles

We intend this evaluation of the social listening market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 3 and see Figure 4). Click the link at the beginning of this report on Forrester.com to download the tool. This evaluation represents a point-in-time assessment. Forrester clients may contact Forrester for recent market updates.

FIGURE 3 Forrester Wave™: Social Listening Platforms, Q3 2018

THE FORRESTER WAVE™

Social Listening Platforms

Q3 2018

FIGURE 4 Forrester Wave™: Social Listening Platforms Scorecard, Q3 2018

	Forrester's weighting	Brandwatch	Crimson Hexagon	Digimind	Linkfluence	NetBase	Sprinklr	Synthesio	Sysomos	Talkwalker	Zignal Labs
Current offering	50%	2.64	2.75	3.31	2.81	3.54	3.78	3.56	2.71	3.72	2.43
Data sources	15%	3.60	2.70	3.80	3.25	2.70	4.00	4.30	1.25	3.30	1.70
Data quality	15%	1.00	3.00	3.00	4.00	4.00	4.00	3.00	4.00	4.00	3.00
Data processing	25%	2.10	3.50	4.10	2.20	3.40	4.60	3.50	3.20	4.20	2.50
Reporting	15%	3.80	3.00	3.40	3.80	4.60	3.00	3.80	3.00	4.60	3.80
Platform functionality	15%	2.10	1.30	3.50	2.00	2.60	3.70	3.80	2.85	3.20	1.90
Integration	15%	3.60	2.50	1.50	2.00	4.00	2.80	3.00	1.60	2.70	1.60
Strategy	50%	2.80	3.68	3.03	2.35	3.70	3.93	3.65	2.78	2.58	2.13
Customer strategy	45%	4.00	3.50	3.50	3.00	4.00	3.50	4.00	3.50	2.50	1.50
Product strategy	45%	2.00	4.00	3.00	2.00	4.00	5.00	3.00	2.00	3.00	3.00
Pricing strategy	10%	1.00	3.00	1.00	1.00	1.00	1.00	5.00	3.00	1.00	1.00
Market presence	0%	4.00	3.50	2.50	3.00	3.50	3.75	3.50	3.50	3.00	1.00
Revenue	50%	5.00	3.00	1.00	1.00	3.00	5.00	3.00	3.00	1.00	1.00
Customer base	25%	5.00	3.00	3.00	5.00	5.00	5.00	5.00	3.00	5.00	1.00
Customer growth rate	25%	1.00	5.00	5.00	5.00	3.00	0.00	3.00	5.00	5.00	1.00

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

Leaders

› **Sprinklr uses its foundational listening tool to amplify the value of its social suite.** Sprinklr believes customer experience management is the future, and social listening is the starting point. It leverages its extensive social data sources and tech integrations to deliver a core listening product that feeds into six clouds spanning 40 social-centric modules, such as publishing, customer care, and advertising, giving its listening capability wider reach within enterprises. Sprinklr recently simplified its cumbersome user interface, enabling every user action with just a few clicks. Even so, client references find mastering "the Sprinklr way" of platform navigation challenging, sharing that a steep learning curve exists to use the tool to its fullest potential. Enterprises that want full coverage across data analysis needs or those seeking to unite many departments within a single social platform should consider Sprinklr — and can anticipate needing Sprinklr's professional services to effectively implement and scale the platform across their companies.

› **NetBase delivers holistic social listening and voice-of-the-customer (VoC) analysis.** This vendor combines social data with non-social customer data (e.g., surveys, focus groups, and ratings and reviews) through its collection of NetBase Instant Search, NetBase Pro, NetBase Enterprise, and voice-of-the-customer products. Its origins in document analysis manifest in strong text and language analysis capabilities, but other areas such as social data source diversity lag. NetBase aims to empower users of all sophistication levels by enabling easy queries using only keywords, handles, or hashtags, with no Boolean operators required. A myriad of dashboard visualizations and customizations facilitate viewing social data alongside other customer data, though the over-abundance of widgets can overwhelm based on Forrester's comparative assessment. Client references praise NetBase's data quality but rate NetBase's account management lower among competitors, making NetBase better for enterprises that care more about horsepower to drive voice-of-the-customer understanding and less about extensive hand-holding.

› **Synthesio consistently delivers the essentials for a social listening platform.** Synthesio anticipates a convergence among marketing, communication, and customer experience disciplines. While that vision isn't the most groundbreaking, Synthesio offers a platform that solidly checks the boxes for key functional requirements, with FlashDash for instant search, Profiler for audience analysis, Page Karma for benchmarks, and Bunkr for presentations. Synthesio incorporates rich data sources across social media, other media, and business data. However, users still must filter and actively train that data given Synthesio's machine learning immaturity — its data processing is reliant on rules-based engines. Clients across the social intelligence sophistication spectrum will appreciate Synthesio's straightforward pricing by number of dashboards with unlimited seats, data, and queries. Synthesio is a sound choice for brands that need a social listening platform that solidly delivers on core functionality, without distracting and superfluous bells and whistles.

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Strong Performers

› **Crimson Hexagon pursues broader consumer insights beyond social.** Crimson Hexagon intends to unify social, enterprise-held, and consumer data for clients. Few client references are importing their first-party data into Crimson Hexagon yet, though. Its HelioSight product for limited quick search and core ForSight product both center on social media. With a sizable investment in ML and computer vision, this vendor has strong text, topic/theme, and image analysis, dissecting images beyond logo, object, and scene detection. Audience and influencer analysis lag despite premium Twitter data access. Crimson Hexagon has a leading approach to client success; client references rate it highly as a strategic partner. This vendor is an option for insights teams that want automated analysis and business intelligence integration but don't need non-mainstream social network data, extensive language coverage, or robust user management and workflow capabilities.

› **Digimind is the platform for heavy data manipulation and visualization.** With a feature-heavy platform, Digimind plans to evolve from emerging player to trusted business partner for global clients by offering prebuilt dashboards upon set up that address specific use cases, such as campaign analysis, product launch, and event marketing. A what/when/where/who/how dashboard heuristic guides users through social insights, making the platform easy to navigate. Client references confirm Digimind's pivot table-like ability to filter, cut, compare, and manipulate any data. But its open-ended data array hinders surfacing insights, and automated capabilities that intend to solve for that, such as its "What's New" tool, are works in progress. Additionally, a unique Google search feature to assess brand reputation alongside social listening is lost in a platform that is overwhelmingly focused on social data. Advanced analysts who want to dictate their own data dashboards will be able to harness the full potential of Digimind's offering.

› **Talkwalker enters the market promoting versatile platform customization.** Relative newcomer Talkwalker has been gaining traction with a "protect, measure, promote" go-to-market framework, reflecting its corporate communications heritage. Its road map aligns with its vision to create a highly technical and flexible product with broad data access, a sophisticated data engine, and advanced analytics for its Quick Search feature and core social listening platform. This flexibility theoretically allows the platform to deliver on any client social intelligence need. Given its origins in brand protection, Talkwalker primarily helps clients with a handful of standard, brand-centric use cases like reputation management, influencer management, and crisis management. It offers abundant prebuilt and custom filtering that lets clients surface data quickly and easily, but client references feel lukewarm about the interface's look and feel. Those looking to understand social media's impact on their brands should consider Talkwalker.

› **Sysomos leads with social listening in its recently unified social suite.** One of the first social listening stalwarts, Sysomos peppered its history with acquisitions to build out its social suite. Its recent merging of search, listen, discover, publish, engage, and analyze modules into one integrated platform was long overdue, resulting in cleaned-up product packaging, naming, and interface. But its April 2018 acquisition by Meltwater, a media monitoring company, ensures more

Sysomos platform changes to come. While Meltwater's media roster will beef up Sysomos' data sources, client references tell us they're still waiting for articulation on how the latest acquisition will affect everyday use. Sysomos' listening road map aims to bring the solution up to par with market table stakes such as automating insights and reports. Client references share their appreciation for the solution's rules-based alerts and ability to bring together earned, owned, and paid social media into a single view. Companies looking for a single platform to help them research, plan, execute, and monitor social programs should consider Sysomos.

› **Brandwatch provides a clean user interface backed by strong client services.** Fast out of the gate in the social listening market, Brandwatch has innovated more slowly than competitors in recent years, allowing others to catch up and surpass it — especially in data processing. It articulates a clear social intelligence vision and strives to "make the complex simple" via a clean user interface across its product family: Analytics, Audiences, Vizia, and Buzz Sumo. Its product road map anticipates features that other vendors already offer, including instant search, life stage classifiers, and emotion analysis. Brandwatch has vast data partnerships (including premium access to Twitter), deeper audience segmentation, easy to digest data visualizations, and numerous technical integration options. Client references share that its account management is "like family" and "brings their A game," making Brandwatch ideal for marketers and analysts who want formidable data and analysis support from a well-equipped service team.

Contenders

› **Linkfluence's no-frills solution helps its largest clients make inroads into Asia Pacific.** With heavy business in the luxury retail, fashion, and beauty categories and a direct partnership with Sina Weibo in China, Linkfluence continues to invest in luxury vertical expertise and solidify its Asia Pacific footprint. The vendor is well-positioned to help clients research consumer and industry social insights but unfortunately stops there. Beyond Linkfluence's core Radarly product, its new search feature and beta audiences tool for influencer research are already standard offerings from most social listening platforms. Client references praise Linkfluence for its competitive benchmarking, earned media coverage, and user management capabilities for multibrand and multiregion teams. At the same time, clients crave more proactive account management to encourage maturity and sophistication in how they use the platform. Global holding companies with multiple brands that desire straightforward research and insights should consider Linkfluence.

› **Zignal Labs is heavy on brand protection to meet niche communications' needs.** Though this vendor endeavors to expand social listening use cases beyond its core communications and marketing buyers, Zignal Labs still has deep roots in risk detection and reputation management. This focus has enabled it to develop specialized capabilities like its breadth and depth of news and broadcast media sources, influencer analysis, a proprietary bot intelligence algorithm to detect fake conversations and how/why they spread, and splashy data visualizations to illustrate that conversation dispersion among connected users' networks (including in display command centers). While client references praise its account management specifically for helping them address

communications needs today, they hope Zignal Labs will continue investing in data sources, improve analysis capabilities within the platform, and add flexible pricing options. Zignal Labs is a strong consideration for clients, including government and public affairs, that want to build and protect their brands.

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Supplemental Material

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by May 21st, 2018.

› **Executive briefings.** Each vendor presented its product, customer, and pricing strategy as part of a three-hour, in-person meeting with Forrester.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality in both live and prepared scenarios. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls and survey.** To validate product and vendor qualifications, Forrester also conducted reference calls with at least three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

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

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. For more information on the methodology that every Forrester Wave follows, please visit The Forrester Wave™ Methodology Guide on our website.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] See the Forrester report "The Future Of Social Intelligence Is In The Enterprise, Not Marketing."

[2] See the Forrester report "Defining Social Intelligence."

[3] See the Forrester report "The Forrester Wave™: Enterprise Social Listening Platforms, Q1 2016."

[4] Increased scrutiny of user privacy is causing social networks to alter data feed parameters to improve user data protection. As a result, social listening platforms and other social technologies relying on this data are experiencing access disruptions as social networks alter their APIs on short notice. For example, Facebook temporarily suspended its data feed to vendor Crimson Hexagon. Clients assessing vendors' data sources may reach out to Forrester for up-to-date assessments. Source: Anna Hensel, "Analytics firm Crimson Hexagon regains Facebook access following scrutiny over government contracts," VentureBeat, August 16, 2018 (https://venturebeat.com/2018/08/16/analytics-firm-crimson-hexagon-regains-facebook-access-following-scrutiny-over-government-contracts/).

[5] See the Forrester report "TechRadar™: Artificial Intelligence Technologies And Solutions, Q1 2017."

[6] Source: Forrester's Q2 2018 Global Social Listening Platforms Forrester Wave™ Customer Reference Online Survey.

[7] Other social suites exist, such as Salesforce Social Studio, however vendors either did not meet Forrester Wave inclusion criteria or primarily deliver value based on integrated social capabilities versus standalone social listening capabilities. See the Forrester report "Vendor Landscape: Social Marketing Technology."

[8] Source: Forrester's Q2 2018 Global Social Listening Platforms Forrester Wave™ Customer Reference Online Survey.

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