A Technology Overview Report

The Content Marketing Software Landscape:
Marketer Needs & Vendor Solutions

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Includes input from 143 ecosystem contributors

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Executive Summary

The content marketing tool landscape is crowded, rapidly changing, and highly inconsistent. Evolution and change are rapid. Marketers struggle to select the right tools not only for their own content marketing needs, but also solutions that integrate with enterprise, process, and platform concerns. This report helps marketers make informed buying choices by mapping eight needs scenarios to the existing vendor landscape.

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The Content Marketing Software Landscape: Marketer Needs & Vendor Solutions

Why Content Marketing Tool Selection Is So Hard

It used to be so simple. Content marketing consisted merely of writing content and putting it on a website. It's now evolved into a complex process involving multiple players throughout the organization, outside agencies and vendors, multimedia, and a proliferation of channels. Growing channel and media complexity, as well as increasing adoption of content marketing, has given rise to a large, complex, and highly disparate content marketing software landscape.

Understanding what tools are available and, more importantly, what tools are needed for content marketing efforts echoes the proverb of the blind men describing an elephant. There are point systems, enterprise solutions, and hybrids, yielding very few apples-to-apples comparisons in the marketplace.

Complicating an already complicated set of choices is the fact that marketers still have a scattershot approach to content. Altimeter finds 70% of marketers lack a consistent or integrated content strategy. Despite a growing awareness (and acceptance) of the fact that content is the atomic particle of all marketing — essential for fueling paid, owned, and earned media — organizations lack a cohesive, coherent, strategic approach to content.

Other trends driving the complexity of the content marketing tools decision include the following:

- **Content creation pressure:** Creating and publishing content is hard, unrelenting work. As a result, marketers tend to focus on the tactics of creation and just "getting content done." Exacerbating this is a campaign focus — if content strategy exists at all, it typically revolves around individual campaigns.

- **Lack of strategy begets tool proliferation:** One national retailer divides content and channel responsibilities between Marketing, PR, Brand, HR, Community, Social Media, and Web, with no central coordination or oversight. Ad hoc execution without goals, processes, communication, and governance inevitably leads to ad hoc tools and random platform purchasing. The result is overlapping workflows and a hodgepodge of tools that are fragmented and often redundant.

70%

Percentage of marketers who say they lack a consistent or integrated content strategy

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- **Lack of enterprise integration:** When solutions are acquired haphazardly, they often don't integrate or work with other enterprise systems. Only 10% of marketers we surveyed say their content tools are integrated into processes such as inbound marketing platforms, business intelligence, or CRM. Yet when pressed, marketers have long lists of needed integrations from their content systems. Beyond technology platform integration, digital content workflows also exist, mainly on their own, with little integration into organizational processes.

- **Misaligned buyer needs versus planned investments:** Our research finds 67% of marketers identify audience identification and targeting as a top need — pointing to the trend of content aligning with advertising and other marketing initiatives. Yet only 25% are actively investing in this area in 2014 (see Figure 1). The need to scale up content creation is a tactical distraction from deeper strategic needs.
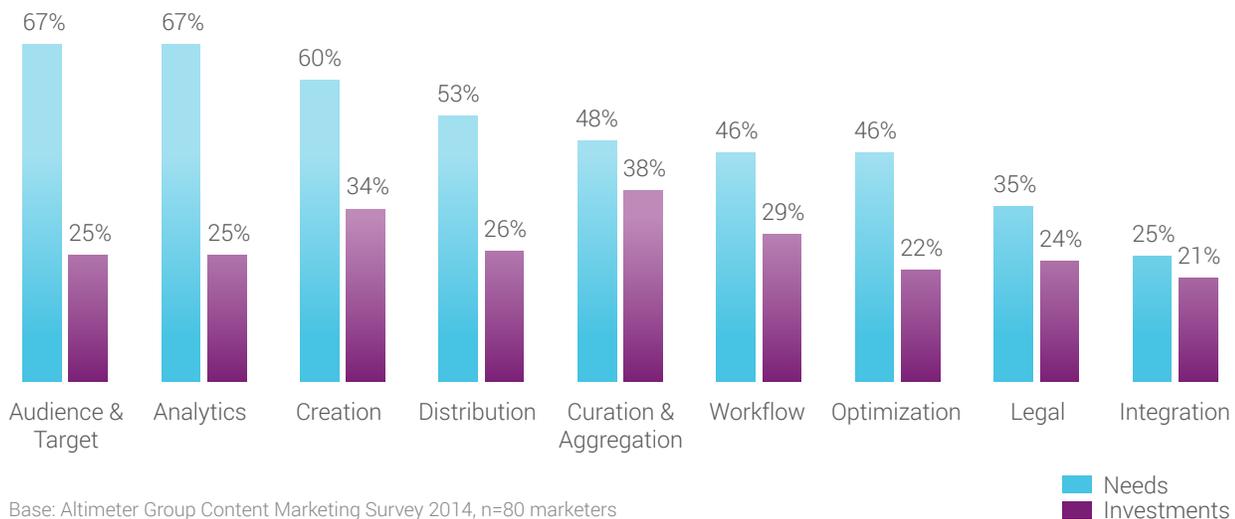
Interestingly, our research found that vendor investment in product improvements correlate and align with marketers' stated needs rather than their planned investments.

Figure 1 depicts needs and investments across the eight primary content marketing use cases we identified in our research of marketers, experts, and vendors. We assess marketer needs and vendor solutions through the lens of these eight use cases in order to facilitate proper alignment between the two.

A Tangled and Emerging Vendor Landscape Complicates the Picture

Because content marketing has so many permutations across hundreds of platforms, the content marketing tool's landscape is a mishmash of vendors, categories, and technology platforms that make it difficult, if not impossible, to make apples-to-apples comparisons between solutions. While some basic technology maps of content marketing tools exist, they support neither vendors' go-to-market

Figure 1 Buyers' Needs Don't Match Planned Investments

Use Case	Needs	Investments
Audience & Target	67%	25%
Analytics	67%	25%
Creation	60%	34%
Distribution	53%	26%
Curation & Aggregation	48%	38%
Workflow	46%	29%
Optimization	46%	22%
Legal	35%	24%
Integration	25%	21%

Base: Altimeter Group Content Marketing Survey 2014, n=80 marketers

Source: Altimeter Group

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strategy nor marketers' decision-making processes.[1] Making this even more confusing are three trends:

Trend 1. Many solutions exist.

Tools to manage, create, measure, optimize, and otherwise wrangle content marketing are rapidly proliferating. Altimeter Group identified over 110 content marketing vendors, exclusive of certain categories, including email, marketing automation, content management systems (CMS), digital asset management solutions (DAMs), and social media management software (SMMS).[2] The market is diverse and multifaceted. Mergers and acquisitions (M&A) activity is rapid. Just tracking the content vendor ecosystem is a near full-time job.

### Trend 2. The content vendor landscape is sharply bifurcated.

The majority is small — only 6% of companies we surveyed have over 100 employees and are not yet profitable. A third offer is a freemium model within which one-third of their customers pay nothing for the service. Of course, a small handful of giants — namely, Adobe, Oracle, and Salesforce.com — loom over the landscape, all rapidly acquiring and consolidating players. These giants serve the entire marketing spectrum, brand themselves as "marketing clouds," and are beginning to use terms such as "content alignment" and "converged media" in sales collateral and value propositions.

Trend 3. Content marketing evolution is driving consolidation.

We found that the movement of content marketing toward converged media — organizations are developing capabilities to make owned content more fluid so it can be used, optimized, and deployed in shared (usually social media) and paid (advertising) channels — creates pressure for vendors to match this emerging need with fuller offerings.

Figure 2 Media Convergence Drives Content Stack Evolution
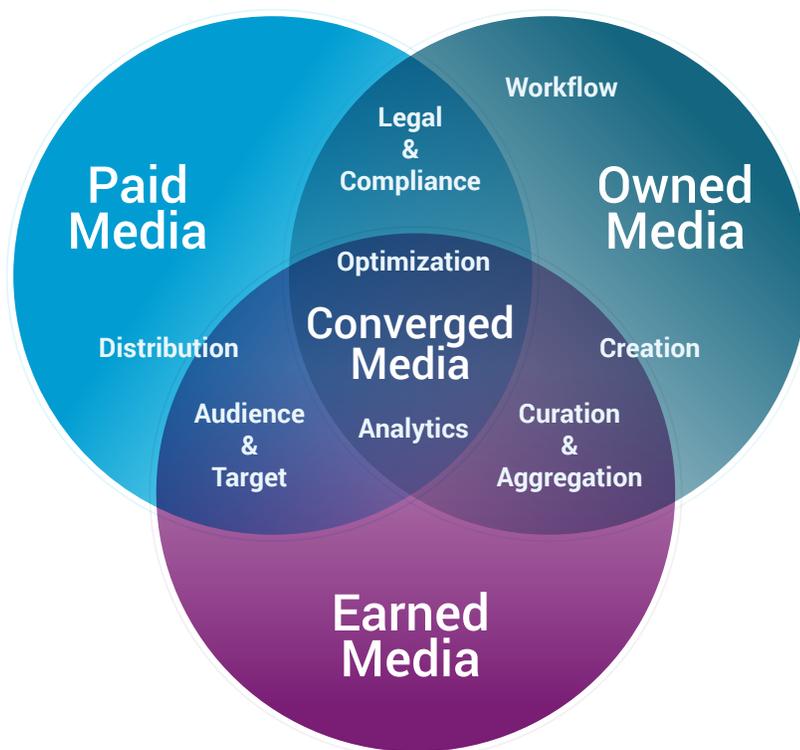
Source: Altimeter Group

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Figure 2 illustrates the relationship between converged media and content marketing use cases, which are often transmedia in nature. This convergence of media development and deployment is contributing to the evolution of the content "stack," away from disparate point solutions serving limited needs.

In some cases, point solutions are being strung end-to-end to create increasingly broader content marketing platforms. For example, Scripted, Percolate, and Contently, which all began as written-word providers, all recently added graphics capabilities into their toolsets.

The giant providers are also jumping in. Recent major moves include Adobe's announcement of its intention to integrate its Creative and Marketing Clouds; Oracle's acquisition of Eloqua, Responsys, and Compendium; and Salesforce. com snapping up ExactTarget, Buddy Media, and Pardot. Most recently, IBM made a tentative foray into the space by buying Silverpop.
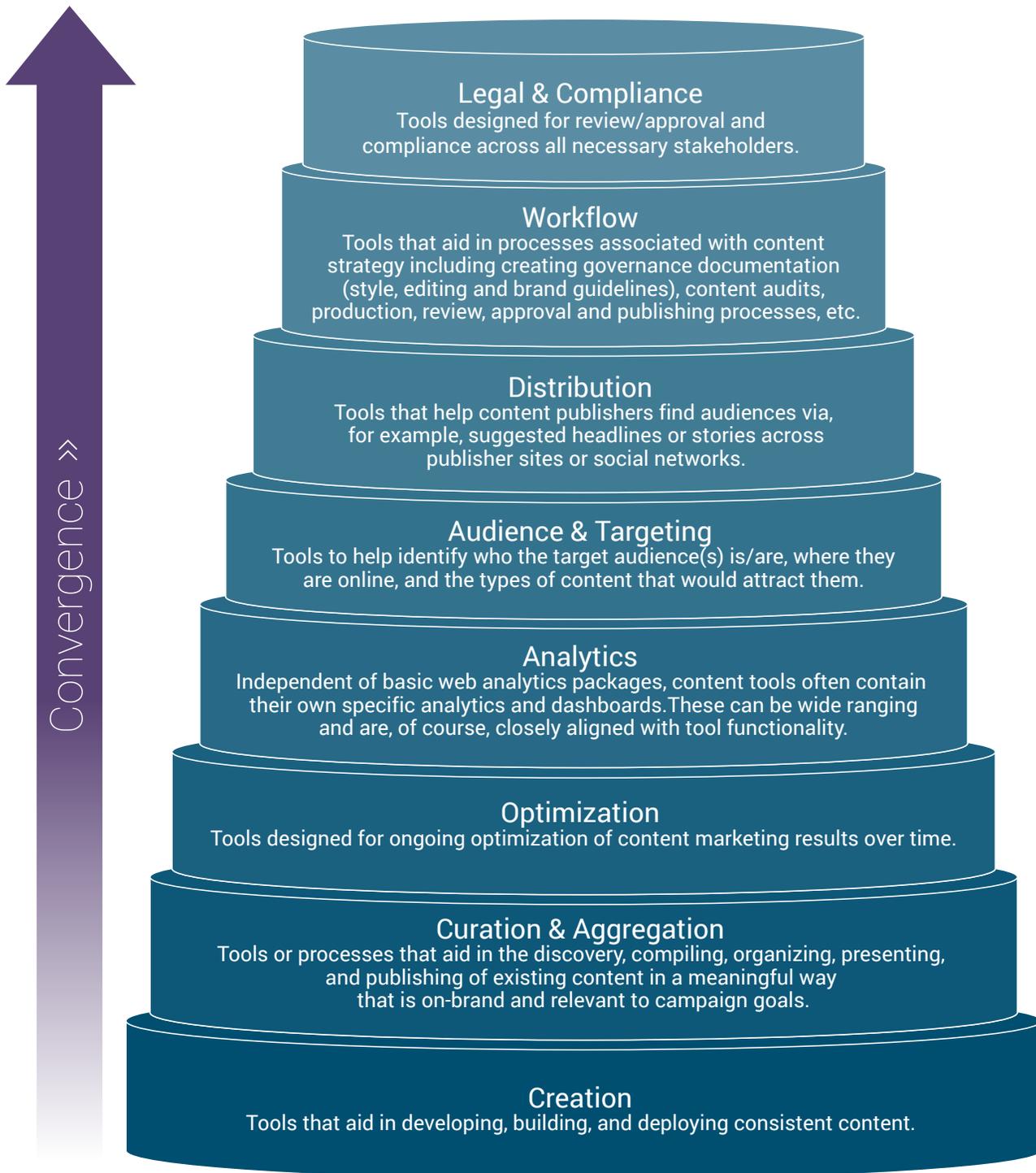
Content Stacks Will Emerge

While fragmented today, Altimeter believes that the content marketing tool landscape will begin to consolidate in earnest. By 2016, there will be "content stack" offerings in the marketplace — end-to-end solutions akin to ad stacks. Currently, no single vendor has an end-to-end solution. Eventually, a few will partner, merge, acquire, and/or collaborate to create a total solution.

Content solutions will also soon absorb other software categories. For example, the distinction between SMMS and content marketing tools is blurring and will soon vanish as marketers and vendors demand content capabilities in a growing number of platforms. Close to 85% of content marketing tools publish on social platforms, a number not statistically different than their ability to publish on websites. This will render most social-only tools redundant. "The big marketing technologies like Social Publishing and Marketing Automation don't work without content. Content is the fuel; you can't have one without the other," explains Doug Pepper, general partner of Interwest Partners.

Figure 3 is Altimeter Group's *Content Tools Stack Hierarchy*, which illustrates how primary content marketing use cases align against the three common pains content marketers face, as described in the next section.

By 2016, there will be "content stack" offerings in the marketplace — end-to-end solutions akin to ad stacks.

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Figure 3 Content Tool Stack Hierarchy

Convergence »

Legal & Compliance
Tools designed for review/approval and
compliance across all necessary stakeholders.

Workflow
Tools that aid in processes associated with content
strategy including creating governance documentation
(style, editing and brand guidelines), content audits,
production, review, approval and publishing processes, etc.

Distribution
Tools that help content publishers find audiences via,
for example, suggested headlines or stories across
publisher sites or social networks.

Audience & Targeting
Tools to help identify who the target audience(s) is/are, where they
are online, and the types of content that would attract them.

Analytics
Independent of basic web analytics packages, content tools often contain
their own specific analytics and dashboards.These can be wide ranging
and are, of course, closely aligned with tool functionality.

Optimization
Tools designed for ongoing optimization of content marketing results over time.

Curation & Aggregation
Tools or processes that aid in the discovery, compiling, organizing, presenting,
and publishing of existing content in a meaningful way
that is on-brand and relevant to campaign goals.

Creation
Tools that aid in developing, building, and deploying consistent content.

Source: Altimeter Group

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Technology Decisions Must Begin With Use Cases

Altimeter Group approaches the content marketing tools problem from the perspective of marketing challenges and needs first, asking what challenges face content marketers today and how can technology help solve them? As marketer needs evolve over time, so will solutions sets. The key is not more or better point solutions but how they come together. Altimeter recommends taking the following three steps to determine your content marketing tool stack:

1) Determine your content marketing use cases.

2) Plan for integration and evolution.

3) Identify and prioritize vendors based on those use cases.

Step 1. Determine Content Marketing Use Cases

Altimeter Group has identified three content marketing scenarios, laddering up from an immature "feed-the-beast" tactical approach to a mature, process-driven, strategic stage that closely mirrors our Content Marketing Maturity Model (see Figure 2). Throughout these scenarios, we found eight overarching content marketing use cases, each with a complement of subcategories. The eight use cases fall into roughly

three phases and escalate in complexity.[3] Here's a quick overview of each of the scenarios and related use cases.

1) Feed the Beast

In this initial phase, the organization struggles to keep up with the unrelenting demands of regularly creating quality content for one or more channels. They typically lack a coherent strategy and have only a bare bones organizational structure (often stemming out of social media). They require a steady stream of ideas and inspiration, as well as the basic tools of content creation. Ultimately, this phase is characterized by the need to master the foundational use cases in content marketing: efficiently creating and collecting content at scale.

2) Refine

In this scenario, process is applied to content creation and production. This is the stage at which a team begins to take shape and roles beyond content creation form, e.g., analytics. Content is audited and assessed, often with a formal scoring or grading process. Channels, audience, and persona considerations play a greatly expanded role in creation. Content is optimized for digital and social distribution, and efforts are made to identify repeatable, sustainable content practices. The leader

Figure 4 Three Content Marketing Scenarios Drive Tool Selection

Source: Altimeter Group

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of the content group makes a more concerted effort to connect content development with the broader marketing teams. The Refinement Phase in content marketing is about getting smarter, optimizing processes, insights, targeting, and program deployment.

3) Govern

In this scenario, there is a need for the content strategy to be formalized and communicated throughout the enterprise; for example, governance and processes are firmly established to meet regulatory requirements. Focus shifts toward expanding the team and its ability to create experiential, engaging, multimedia content rather than simpler stories and informational pieces. Content is created with a view toward being reusable and/or repurposed across paid and earned, as well as owned, media channels. Legal and industry compliance rules and regulations are understood, and guardrails are in place to ensure compliance.

Gather Cross-Functional Requirements & Determine Use Cases

To help identify use cases, take a look at the more granular subcategories within each use case (Figure 5) and assess those needs that apply to your organization.

As a best practice, be certain to solicit stakeholders and end-users for requirements, input, and collaboration. Forty-one percent say those responsible for content have a voice in selecting the tools and technologies they use to execute. Marriott International's Senior Director of Digital Strategy & Distribution Meg Walsh calls this a critical part of the assessment: "We did a series of workshops with the content creators and manipulators and talked about what they needed to be able to do from a technology perspective. So much came down to workflow, particularly around transparency and the ability to understand what's happening with content at any given point."

Figure 5 Content Marketing Use Cases
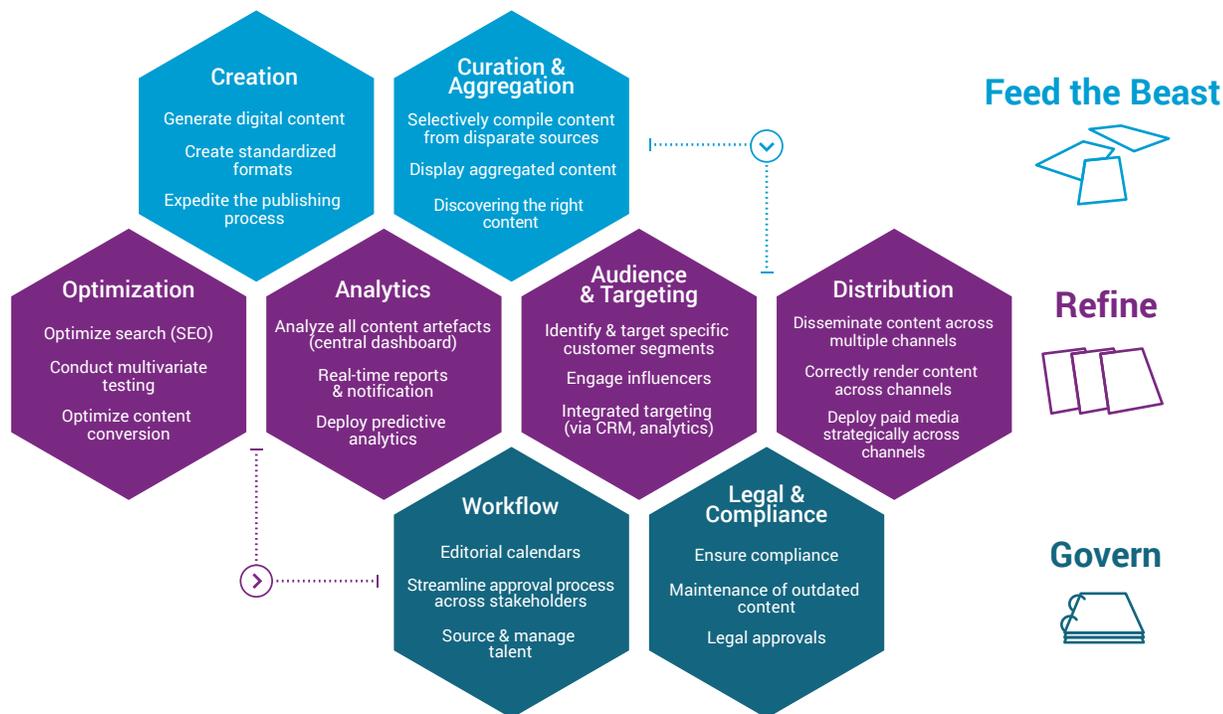
Source: Altimeter Group

Step 2. Plan for Integration and Evolution

Integration considerations are essential because of the pending consolidation driven by converged media, as well as the evolution of content stacks. Each of the eight content marketing use cases come with a host of potential integration issues, yet only 10% of marketers say their content marketing technologies are "fully integrated across people, processes, and platforms." Identifying essential integrations can help refine a final list of prospective vendors. Content marketing software integration is tripartite:

1. **Integration with systems.**

   This includes legacy and often future platforms, such as data and analytics, CRM, and inbound marketing. Petco's Chief Content Officer Greg Seremetis emphasizes his group's voice is one of many at the table when new tools are discussed and vetted inside the company.

2. **Integration with the organization, such as internal communications, corporate intelligence and internal networks.**

   "Why shouldn't our call center agents have access to same information that guests have?" asks Walsh at Marriott International.

3. **Integration with processes, including workflow and organizational structure.**

   This may include taking outside partners and/or agencies into account. "You can't retrofit activities to the tool; you have to align the tool with your activities," according to Kristina Halvorson, CEO & founder of Braintraffic.

   Our research found that there are common integration points marketers leverage across each use case (see Figure 6). While not universal to all marketers' scenarios, these integrations fall into eight primary categories. The figure below charts how these common points of integration typically map against use cases.

> "You can't retrofit activities to the tool; you have to align the tool with your activities."
>
> Kristina Halvorsen
> Founder & CEO, Braintraffic

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Figure 6 Content Marketing Integration Needs

	Ad Exchange	Data & Analytics	Digital Media	Marketing Cloud	Search Engines	Sharing Platforms	Storage Platforms	Syndication Tools
	Display Inventory Sources; Mobile Ad Servers; Desktop Ad Servers	Web Analytics; Business Intelligence; CRM; Mobile Data; E-Commerce Platforms; A/B Testing Tools	Publisher/News Outlets; Blogs; Video Platforms; Audio Platforms; Image Platform	Other CM Tools; Marketing Automation; SMMS; Publishing & Embedding Tools; E-Mail Marketing Tools; Influencer ID Tools	Search Engine Optimization	Social Networks; Community Platforms; Enterprise Collaboration Tools	Cloud Storage; CMS; DAM; Web Server	RSS Feeds; Syndication Widgets
Creation		⊗	⊗	⊗		⊗	⊗	
Curation & Aggregation			⊗	⊗	⊗	⊗	⊗	⊗
Optimization	⊗	⊗		⊗	⊗	⊗	⊗	
Audience & Target	⊗	⊗		⊗		⊗	⊗	
Analytics		⊗		⊗		⊗	⊗	
Distribution	⊗	⊗	⊗	⊗	⊗	⊗	⊗	⊗
Workflow				⊗		⊗	⊗	
Legal & Compliance	⊗		⊗	⊗				⊗

Source: Altimeter Group

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Step 3. Identify and Prioritize Vendors

Once a solid understanding of use cases and integration needs is reached, marketers can employ the following checklist to help prioritize those needs for vendor selection. Rank use cases in order of priority, maintaining focus on the top three to five most important use cases (see Figure 7).

Figure 7 Content Marketing Needs Checklist

Marketer Needs	Use Case	Priority Integration(s)
☐ Generate digital content ☐ Create standardized content formats ☐ Expedite the publishing process	Creation	☐ Sharing Platforms ☐ Data & Analytics ☐ Digital Media ☐ Marketing Cloud ☐ Storage Platforms
☐ Compile content from disparate sources ☐ Display aggregated content ☐ Discover the right content (for ideas, for sharing)	Curation & Aggregation	☐ Sharing Platforms ☐ Search ☐ Digital Media ☐ Marketing Cloud ☐ Storage Platforms ☐ Syndication Platforms
☐ Optimize search (SEO) ☐ Conduct multivariate testing ☐ Optimize content conversion	Optimization	☐ Sharing Platforms ☐ Ad Exchanges ☐ Search ☐ Data & Analytics ☐ Marketing Cloud ☐ Storage Platforms
☐ Identify & target specific customer segments ☐ Engage influencers ☐ Integrated targeting (via CRM, email marketing, analytics, etc)	Audience & Targeting	☐ Sharing Platforms ☐ Ad Exchanges ☐ Data & Analytics ☐ Marketing Cloud ☐ Storage Platforms
☐ Analyze all content artifacts (central dashboard) ☐ Real-time reporting & notification ☐ Deploy predictive analytics to drive content marketing	Analytics	☐ Sharing Platforms ☐ Data & Analytics ☐ Marketing Cloud ☐ Storage Platforms
☐ Disseminate content across multiple channels ☐ Display content correctly across channels (incl. device types) ☐ Deploy paid media strategically across channels	Distribution	☐ Sharing Platforms ☐ Ad Exchanges ☐ Search ☐ Data & Analytics ☐ Digital Media ☐ Marketing Cloud ☐ Storage Platforms ☐ Syndication Platforms
☐ Organize content cadence ☐ Streamline approval process across necessary stakeholders ☐ Talent sourcing & management	Workflow	☐ Sharing Platforms ☐ Marketing Cloud ☐ Storage Platforms
☐ Profile content for compliance ☐ Store & disposal of historical content ☐ Legal approvals	Legal & Compliance	☐ Ad Exchanges ☐ Digital Media ☐ Marketing Cloud ☐ Syndication Platforms

Source: Altimeter Group

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Having prioritized use cases and integration requirements, the next step is to figure out which vendors can satisfy the requirements of those use cases. Altimeter requested information from 110 content marketing vendors, and 53 provided responses to our extensive survey. Each vendor was not only asked which use cases they supported, but also asked to force rank which use cases they supported best.

The results are summarized in the appendix. Take a look at your own prioritized use cases developed in Step 1 above, and see which vendors should be on your short list because their priorities match your own. You may also consider working with multiple small vendors who provide point solutions, because they concentrate on key use cases that are important to your content marketing organization.

Content Tool Best Practices

Regardless of an organization's specific software needs or level of content marketing sophistication, there are best practices around assessing, buying and introducing new content marketing software that are universally applicable.

- **Train staff** to use tools (and on content marketing/strategy in general). Only 24% of the marketers we surveyed say employees are formally trained and empowered to publish on behalf of the brand.

- **Avoid redundancies.** There is considerable overlap in content marketing software functionality, e.g., nearly all tools have some sort of built-in analytics dashboard. Yet, marketers often invest in a tool for its primary feature without realizing that there are secondary or tertiary features that they then buy elsewhere. Related to this is integration driving "one version of the truth" vs. "multiple realities that don't align when viewed in aggregate." This is an important consideration for cost efficiencies as well: 40% of the content marketers we surveyed report that the lack of inter-departmental coordination is leading to disparate tools being used.

- **Build for speed.** How quickly and efficiently teams can implement, set up, train, and use new tools is paramount, as is how quickly tools can "deliver

relevant content in a timely fashion," as Andrew Milburn at American Express puts it. Foremost among marketers' planned investment in content marketing software are tools to aid in the rapid creation and deployment of content, particularly for those utilizing various forms of real-time marketing.[4] Rapid personalization, delivery, and the ability to build content based on buzz is a primary consideration.

- **Consider IT support (or lack thereof).** Whether a solution requires initial or ongoing support from IT is a consideration for many marketing organizations, particularly with an ever-increasing "need for speed." A growing trend is solutions that enable marketing to bypass IT for day-to-day publishing needs on owned media, such as design changes to a website.

- **Scale toward the future.** Channels and tactics that marketers may not be using today — e.g., mobile, real-time marketing, native advertising, future enterprise technology investments, or localization for international markets — can rapidly become urgent realities that will require urgent integration. "Can it scale?" is a difficult, yet essential question when considering content marketing software investments. Internationalization and localization are often overlooked when global enterprises invest in tools. Language, local channels and platforms, and other region/country specific considerations can be critical criteria. Both LinkedIn's Jason Miller and Petco's Greg Seremetis adopt an experimental test-and-learn approach, trialing new solutions prior to investing in them.

The Present and Future Vendor Landscape

The content marketing vendor landscape is in a period of hyper-growth and hyper-consolidation. The dust won't settle for several years. Some of the overarching trends we're seeing in the tumult include the following:

Bigger doesn't mean better — and vice versa. Zoomforth, a two-year-old startup with three employees, serves

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enterprise clients, such as Deloitte, AT&T, and Adidas. The largest content enterprise players (Adobe, Oracle, Salesforce.com) service small and medium-size businesses alike, which they are striving to buy and integrate their way into the sector, and their intentions and long-term visions are far from realized.

Of the Goliaths, it's Adobe's battle to lose given its robust and well-established Creative Cloud. However, that family of products is geared more toward publishing than marketing, and many essential use cases reside in the company's Marketing Cloud. While Adobe recently announced its intention to integrate the clouds, that's easier — and much more quickly — said than done. Adobe has also aligned with start-ups, such as Thismoment, that offer needed capabilities around legal, compliance, and UGC.

The above reasons account for the fact that when vendors are questioned about their competitors, Adobe's name trails after more marketing-oriented solutions. The other Goliaths, Oracle and Salesforce. com are aggressively acquiring capabilities, while IBM is a laggard.

Investment and acquisition have not yet peaked. New vendors continue to emerge; existing ones are adding capabilities (and enjoying significant new rounds of funding). The marketing clouds are still on an acquisitive tear. These are all signs of growth rather than maturity. It will be a couple of years or more before the market shakes out and normalizes and a few content stacks begin to emerge. Content stacks will be similar in structure

and function to ad stacks, with which they will integrate. Eventually, this will become the true meaning of the term "marketing cloud." Again, Adobe holds the most pieces of this puzzle, but assembling them won't be fast, or easy.

Vendors are listening to customers and integrating according to their needs. Vendors are prioritizing analytics and attributable cross-channel marketing by employing a wide range of integrations. And while not a primary use case today, one out of three vendors will be deploying Audience & Targeting capabilities in the next 12 months, matching marketers biggest "want" in content capabilities.

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Appendix: Individual Vendor Capabilities

The following table was compiled based on the research Altimeter conducted across content marketing vendors we surveyed. Vendors were able to self-select which of the top eight use cases they supported and then rank the top three they best support. This information is self-reported by the surveyed vendors who were asked to rank, in order, the top three use cases they support (1-3), as well as to indicate which other use cases their solution addresses with a solid circle (●). If a vendor does not report supporting a use case, it is designated with a hollow circle (o).

Company	Workflow	Curation/ Aggregation	Creation	Distribution	Audience & Targeting	Analytics	Optimization	Legal & Compliance
Adobe	●	●	1	●	●	2	3	●
Ahalogy	3	1	o	o	o	●	2	●
BloomReach	o	1	o	o	o	3	2	o
Brandle, Inc.	3	o	●	o	●	1	o	2
BrightInfo	o	o	o	o	1	3	2	o
Contently	2	●	1	o	o	●	o	3
Curata	o	1	●	3	●	●	2	●
DivvyHQ	2	o	1	o	o	o	o	3
Ebyline	2	o	1	o	o	●	o	3
Expion LLC.	2	●	●	1	o	●	3	●
Flite Inc.	●	1	o	●	o	3	2	o
idio	o	●	o	o	1	2	3	o
InboundWriter	o	o	1	o	●	3	2	o
inPowered	o	1	o	●	●	3	2	o
Kapost	1	●	3	●	●	2	●	●
Kentico Software	2	●	1	o	3	●	●	o
Kontera	o	●	o	3	2	1	●	o
Linqia, inc	2	o	●	3	1	●	●	o
Livefyre	o	2	1	●	o	o	3	o
LookBookHQ	o	1	2	o	o	3	o	o
Mass Relevance	o	1	●	●	o	3	2	●
MovableMedia	o	o	3	2	1	●	o	o
NewsCred	1	3	2	●	●	●	●	●
nRelate	o	●	o	1	3	●	2	o
OneSpot	X	o	o	1	3	●	2	o
Oracle	3	●	1	●	2	●	●	●
Outbrain	o	●	o	1	o	2	3	o
PaperShare Inc	o	o	●	1	●	3	2	o
Percolate	1	●	2	●	3	●	●	●
Percussion Software	2	o	1	o	o	o	3	●
Pixlee		1	3	o	o	2	●	
Rallyverse	3	1	2	●	o	●	●	o
ReadyPulse	●	2	●	●	1	●	●	3
RebelMouse	●	1	2	3	o	●	●	●
Repost	o	1	o	2	●	3	●	o
Salesforce.com	3	●	1	●	2	o	o	o
Scoop.it	o	1	o	2	o	3	o	o
Scripted.com	2	o	1	3	o	o	o	o
SimpleReach	o	●	●	2	●	1	3	o
Skyword	2	o	1	●	o	●	3	●
SnapApp	●	o	1	2	o	3	●	o
SocialFlow	3	●	●	2	●	●	1	o
SocialWhirled	2	●	1	o	●	3	●	o
Springpad	o	1	2	3	o	o	o	o
SqueezeCMM				o	3	1	2	●
Stipple	o	1	2	o	3	●	●	●
Storify (by Livefyre)	●	1	2	o	o	o	3	o
Studio One	o	●	2	1	3	●	●	o
TapInfluence	●	●	1	2	●	3	●	●
Thismoment	3	1	o	o	o	2	o	●
Trapit, Inc.	3	1	o	o	o	2		o
TripleLift	o	1	●	3	●	●	2	o
Visually	3	o	1	2	o	●	o	o

Source: Altimeter Group

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Endnotes

[1] For example, the Content Lumascape, which can be found at http://www.slideshare.net/tkawaja/content-marketing-31091520.

[2] Altimeter Group decided to exclude Content Management Systems (CMS), Digital Asset Managements Systems (DAMs), and Social Media Monitoring Solutions (SMMS) from our vendor assessment in order to focus primarily on those vendors specializing in the marketing of content assets.

[3] Common content marketing scenarios align with content maturity mapping developed in Altimeter Group Report *Content: The New Marketing Equation*. This report is available at http://www.slideshare.net/Altimeter/content-the-new-marketing-equation.

[4] Marketers are prioritizing agile deployment to drive real-time marketing capabilities. The Altimeter Group Report *Real-Time Marketing: The Agility to Leverage Now* is available at http://www.slideshare.net/Altimeter/report-realtime-marketing-the-agility-to-leverage-now-by-rebecca-lieb-jessica-groopman.

[5] Altimeter Group published a report on the Social Media Monitoring Solutions landscape in January 2012. That report can be found at http://www.slideshare.net/jeremiah_owyang/smms-report-010412finaldraft.

Methodology

Altimeter Group emailed a survey to 110 content marketing software vendors. Roughly half the vendors (53) responded. To qualify to receive the survey, each vendor was required to fit with at least one of the eight use case criteria. Several vendor categories were deemed ineligible for this survey, despite having strong content capabilities. Additionally, we surveyed 80 marketers and interviewed 10 experts from brands, agencies, and VC firms.

Excluded categories include social media marketing software (SMMS[5]), Marketing Automation, CMS, and Digital Asset Management. Clearly, integration of these types of tools into content solutions can, dependent on infrastructure and goals, be essential to success (as referenced in Figure 7).

It should be obvious, but it's equally essential to point out, that not every qualified software vendor is represented in this survey. The market is rapidly changing, new players emerge constantly, and we continue to regularly conduct briefings with vendors. Altimeter Group is working to develop an online database of content vendors that we can keep current. We hope to announce that component of this research soon. Vendors are encouraged to request briefings via this form: http://www.altimetergroup.com/research/briefings.

Ecosystem Input

This report includes input from market influencers and solution vendors who were interviewed or briefed by Altimeter Group during the course of this research. Input into this document does not represent an endorsement of the report by the individuals or companies listed below.

Altimeter fielded our content marketing vendor survey to 110 content marketing software vendors. The following 53 content marketing vendors completed our survey and were included in our research and analysis of the content marketing software landscape.

Software Providers (51)

Adobe	PaperShare
Ahalogy	Percolate
Bloomreach	Percussion Software
Brandle, Inc.	Pixlee
BrightInfo	Rallyverse
Contently	RebelMouse
DivvyHQ	Repost
Ebyline	Salesforce.com
Expion	Scoop.it
Flite, Inc.	Scripted.com
idio	SimpleReach
InboundWriter	Skyword
inPowered	SnapApp
Kapost	SocialFlow
Kentico	SocialWhirled
Kontera	Springpad
Linquia, Inc.	SqueezeCMM
Livefyre	Stipple
LookBookHQ	Storify (by Livefyre)
Mass Relevance	Studio One
Moveable Media	TapInfluence
NewsCred	Thismoment
nRelate	Trapit, Inc.
OneSpot	TripleLift
Oracle	Visually
Outbrain	

Brands & Agencies (6)

3M, Carlos Abler, Manager, Online Content Strategy

Brain Traffic, Kristina Halvorson, CEO & Founder

American Express, Andrew Milburn, Director Digital Content Orchestration

Edelman, Steve Rubel, Chief Content Strategist

Petco, Greg Seremetis, VP/Chief Content Officer

Marriott International, Meg Walsh, Senior Director of Digital Strategy & Distribution

Industry Experts (4)

HubSpot, Joe Chernov, VP Content

LinkedIn, Jason Miller, Sr. Content Marketing Manager

Emergence Capital, Santiago Subotovsky, Venture Capitalist

Interwest Partners, Doug West, General Partner

Altimeter Group also fielded a survey to Content Marketing practitioners (end users), which received 80 responses from content marketers across diverse company types.

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Acknowledgements

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Authors

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Charlene Li (@charleneli) is Founder of Altimeter Group and author of the *New York Times* bestseller, *Open Leadership.* She is also the co-author of the critically acclaimed bestselling book, *Groundswell,* which was named one of the best business books in 2008. She is one of the foremost experts on social media and technologies and a consultant and independent thought leader on leadership, strategies, social technology, interactive media, and marketing.

How to Work with Us

Content strategy *establishes strategic, business-oriented goals for content* and also enables repeatable processes for the planning, creation, delivery, and governance of digital content that are both useful to and useable by an organization's constituencies. In conjunction with content marketing software research, there are several ways Altimeter can help with your content strategy:

- Content strategy roadmap: Development of benchmarks for your organization's content marketing maturity and a roadmap for moving forward.
- Content audit: A qualitative and quantitative assessment of your organization's content marketing effectiveness, capabilities, and governance
- Content vendor selection: Based on existing capabilities, content strategy, and stated needs and requirements, Altimeter Group will suggest a short list of vendors/solutions.

To learn more about Altimeter's content offerings, contact Leslie Candy at leslie@altimetergroup.com or 617.448.4769.

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