Market Guide for Social Analytics Applications

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Initiatives: Analytics, BI and Data Science Solutions

Data and analytics leaders need to find the right social analytics solution for their organizations, due to the maturity and lack of differentiation among vendors. Use this research to evaluate tools that provide market research, detect customer service issues and gain competitive intelligence.

Overview

Key Findings

- There are two primary types of vendors serving the social analytics market today: social analytics specialists and social marketing management suites.
- Data and analytics leaders may be unaware of the social analytics strategies that have been largely driven by marketing organizations and therefore look to their analytics and BI providers for basic support of social media channels.
- Data sources are not critical differentiators in application selection. Most vendors have access to the APIs for Facebook, Twitter and Instagram, and other popular blogs and forums that function in a similar way to social media.
- Increased privacy regulations globally have challenged social media networks, which have begun limiting some access to their social media data.
- Social analytics vendors are advancing their offerings by leveraging artificial intelligence (AI), and image and some video analysis.

Recommendations

Data and analytics leaders modernizing analytics and BI strategies and solutions:

- Collect use cases by deciding which category of application you need and what information sources are important.
Market Definition

Gartner defines social analytics as the process of collecting, measuring, analyzing and interpreting the results of interactions and associations among people, topics and ideas from social media sources.

This Market Guide examines social analytics applications covering but not limited to:

- Social monitoring and listening — The near-real-time identification of relevant social posts through keywords, brand or product names and topics including changes, trends or anomalies.
- Text analytics — Deriving business insight or automation from structured and unstructured text.
- Sentiment analysis — Understanding whether a post reflects a positive, negative or neutral view of a topic (see Note 1).
- Image analysis — The analysis of still images to identify a setting, such as a beach or a restaurant.
- Video analytics — The analysis of video content to identify key subject matter, like a logo.
- Emojis — The analysis of how emojis add emotional emphasis to a sentence in text.
The vendors mentioned in this guide are largely (although not exclusively) point solutions focused on social data collection and analysis. These solutions are different from social marketing management tools that may include social analytics capabilities as part of a broader platform, including content publishing, distribution, and engagement and customer service capabilities. For more on those tools, see our Market Guide for Social Marketing Management.

**Market Description**

Facebook is the most widely used of the major social media platforms, and its user base is most broadly representative of the population as a whole. Facebook currently sits at more than 2.6 billion monthly active users. The company also owns four of the biggest social media platforms, all with over 1 billion monthly active users each: Facebook (core platform), WhatsApp, Facebook Messenger and Instagram. Most top-ranked social networks with more than 100 million users originated in the United States, but European services like VK, the Japanese platform LINE, or the Chinese social networks WeChat, QQ or video sharing app Douyin have also garnered mainstream appeal in their respective regions due to local context and content. Douyin's popularity has led to the platform releasing an international version of its network: an app called TikTok.

While Facebook has the most active users, its data is very restricted and therefore is a small slice of data available to social analytics tools to analyze (see Figure 1).
Social analytics addresses a wide breadth of use cases across regions and industries, which allows for hundreds of specialty vendors to emerge in this low-barrier-to-entry space. There has also been consolidation and other changes in the market:

- NetBase acquired Quid in January 2020.
- Khoros acquired Topbox and Flow.ai in January 2021 expanding its reach into adjacent categories such as voice of the customer and chatbots.
- Hootsuite acquired Sparkcentral.

![Social Media Market Share - January 2021](image)
Data and analytics leaders may be unaware of the social analytics strategies that have been largely driven by marketing organizations, and therefore look to their primary analytics and BI providers for basic support of social media channels. In such cases, the social analysis being processed is often superficial and cites metrics such as the number of followers or number of impressions, which often have limited intrinsic business value.

As a result, there have been plenty of business opportunities for specialists — both stand-alone and even partners of suites of social marketing management vendors. We expect some of these providers to continue to be acquired over the course of the next two years, continuing the trend of vendor consolidation.

Despite the dominance of these players, many clients use more than one social analytics provider to support specific use cases in specific regions. Different tools analyze different types of data, including text, image (proprietary and via partner), emojis, video (image/pixels), topic (graph), and profile or user graph.

While most tools have access to the same data, not all social analytics tools analyze the same data. D&A leaders should review the types of data potential vendors collect via public or commercial APIs to measure and analyze social media sources to identify the best partner for their future channel and content needs.

Use Cases

Most data and analytics leaders will be aware of the marketing, sales and customer service use cases. However, as data and analytics leaders work across the organization to identify best-fit solutions, capabilities in areas like risk management may also be relevant.

Identify first and secondary priority use cases to help you evaluate tools based on your unique needs. Social analytics tools are used for a variety of purposes beyond marketing, including customer support, human resources, product development, risk management, sales and supply chain. Leading marketing use cases that dominant vendors address include:

- Keyword monitoring
- Measuring campaign success
- Competitive analysis
In this research, we focus on 15 vendors that address the most frequently mentioned use cases for social analytics in this market guide (see Figure 2 for representative use cases).

**Figure 2. Representative Use Cases**

- Competitor Analysis: 44%
- Trend Analytics: 44%
- Audience Analytics (e.g., demographics): 36%
- Brand Perception: 32%
- Brand Management: 28%
- Campaign Measurement: 28%
- Influencer Analytics: 28%
- Market Research: 20%
- Community Engagement: 20%
- Hot Topics by Audience: 16%
- Crisis Management: 16%
- Sentiment Analysis: 12%
- Other (Loyalty, Strategy and Viral Marketing): 12%
- Campaign Execution and Management: 12%
- Reputation Management: 12%
- Risk Identification: 8%
- R&D/Product Innovation: 8%
- Conversation Analysis: 4%

Source: Gartner
Identify first and secondary priority use cases to help you evaluate tools based on your unique needs.

**Market Direction**

Social analytics applications fall into one of two general categories:

1. **Specialist** — An application provider specializing in one or two functional areas supporting social CRM. Examples include Black Swan Data, Brandwatch (by Cision), Clarabridge, Conversion.Ai, Digimind, Linkfluence, ListenFirst, NetBase Quid, Synthesio, Talkwalker and Zignal Labs.

2. **Social marketing management suites** — A suite of social applications for publishing, engagement, analytics and (sometimes) communities. Ideally, suites create a single, shared, social-only customer record. Examples include Khoros, Meltwater, Sprinklr and Sprout Social.

Almost all social analytics applications are SaaS-based rather than on-premises; hence, this is no longer a differentiator.

To date, the specialists have largely been seen as leaders in the space among our clients, but depending on how social analytics is managed within an organization, we do see interest in social marketing management suites from marketing stakeholders.

Many organizations are looking to have everything social-related encompassed in a single tool. In these scenarios, clients are looking for suites such as Sprinklr or Khoros for all social marketing and service, including listening. Often, clients seeking more complex social analysis (including identifying new market opportunities or entity-level sentiment analysis) end up with additional contracts for specialist social analytics tools.

**Market Analysis**

An uptick of interest in social analytics peaked in mid-2020 as brands were looking to understand the impact of COVID-19 and social unrest. Gartner sees the following business, technology and societal trends across social analytics. These trends will increase the business impact of the insights and advance the technology, while changing the dynamics of the market:

- Adoption of social analytics across the enterprise.
- Increased adoption of advanced analytics, including AI technologies.
Adoption of Social Analytics Across the Enterprise

The use of social analytics applications in marketing or market research is well-established. Social analytics applications supporting broader use cases (in customer support, for example) are less common but readily available from a technology perspective. The main obstacle for the realization of the potential of social analytics is that it is typically handled in isolation by a social media team rather than a broader data and analytics team that can support marketing, product development, sales, CRM or HR.

Social analytics may be minimized if it is viewed as a one-off report, rather than information critical to impacting business change and part of a cross-functional strategy. Conversely, some organizations place too much emphasis on social data if it’s viewed in isolation. For example, negative sentiment identified in a small data sample of tweets may get outsized attention when it’s not viewed along with more robust customer data like customer satisfaction (CSAT) surveys, call center transcriptions or brand perception surveys.

For optimal results, social analytics should enable cross-functional teams by integrating with other analytics and business intelligence (BI) platforms, including:

- Broader BI platforms such as Microsoft, Tableau and Qlik
- Digital marketing analytics such as Google and Adobe Analytics
- Voice of the customer (VoC) solutions such as Qualtrics and Medallia
- Customer journey analytics such as Kitewheel and BryterCX

This trend will lead to the following outcome:

- We expect that CX analytics vendors will build or buy pieces of social analytics functionality.
- Social media marketing suites will be most important by providing multichannel analytics and publishing capabilities.

Increased Adoption of Advanced Analytics, Including AI Technologies
Many vendors have advanced their offerings from basic rule-based keyword searches to apply natural language processing (NLP), AI and ML to enhance sentiment analysis, analyze patterns across the buying and owning journey, and predict outcomes.

This trend will lead to the following outcomes:

- **AI will be a big differentiator.** Potential buyers should conduct due diligence to determine which vendors are truly deploying AI versus doing “AI washing” (see [What Is Artificial Intelligence? Seeing Through the Hype and Focusing on Business Value](https://www.gartner.com/it-glossary/what-is-artificial-intelligence)).

- **Sentiment analysis will become more sophisticated,** moving beyond linguistics and leveraging AI techniques in text analytics as a source of differentiation.

### Growing Diversity of Data Sources Analyzed Beyond Text, Including Image, Call Center Audio and Video

Social media analytics started with, and continues to be based on, text analytics. But, image analytics is becoming increasingly important. When applied to social media analytics, image analysis is an extension of text analytics features applied to visual context.

Increasingly, vendors are moving from basic logo recognition and analytics text captions to recognizing multiple elements within an image. Their ability to go beyond logos to include faces, activities, objects and scenes, and video analysis means they can analyze the “why” behind a behavior, not just “what” behavior occurred.

Video analytics is currently supported by very few vendors, as it is not yet proven. However, the broader and more diverse the data analyzed, the more potential value in the insights. Given the onslaught of images and video, especially their roles in recent high-profile events, the capability to quickly analyze, report on and remediate potentially unacceptable content is becoming a strategic priority for social networking providers and social analytics vendors alike.

This trend will lead to the following outcomes:

- **Audio and advanced image recognition will become standard in two or three years.**

- **Concerns about violent, politically charged, extremely misleading or other kinds of content that attracts the scrutiny of citizens, law enforcement and governments.**
Due to the recent focus on user data misuse, Facebook (which also owns Instagram) is further limiting how much data vendors can collect from its API. Various nations and transnational entities have drafted legislation attempting to make the corporation legally responsible for user content on their platform.

Although these early attempts are being described as “vague” and “unenforceable,” they will doubtless continue and become more precise and effective. In a way, this is an opportunity for social analytics vendors, who may be able to help identify unacceptable content that Facebook will need to block or remove. It will take time to see how other platforms have emerged and how this impacts social analytics tools.

Which will lead to:

- Facebook and other leading social networks will use real-time social analytics filtering to prevent content from being uploaded in the first place.
- Determining the thresholds of what is allowable also becomes complicated.

**Representative Vendors**

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

**Market Introduction**

The following table provides information on the representative vendors in the social analytics market. Table 1 provides basic information including vendor name, product name and product category (see Note 2).
**Market Recommendations**

**End-User Recommendations**

Create your business case around qualified leads, revenue generated, cost savings or even risk reduction. For example, how can social media analytics anticipate or curtail brand or reputational risk?

What acquisitions will they make, if any? Will you be able to integrate your VoC or CRM applications to make the data even more valuable?

At this point, text analytics are simply “table stakes” and not a source of vendor differentiation. Consider image, video, audio and sentiment analysis in addition to text analytics, and evaluate vendors accordingly. Think about AI enhancements to your social media analytics program or how social data can be used in AI-driven processes and decisions.

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**Table 1: Representative Vendors for Social Analytics**

(Enlarged table in Appendix)

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product Name</th>
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<tr>
<td>Black Swan Data</td>
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<td>Digimind</td>
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<td>Khoros</td>
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<td>Linkfluence</td>
<td>Radarly, Linkfluence Search</td>
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Source: Gartner (June 2021)
Conduct POCs by providing five to 10 phrases to vendors to see how they would interpret them. Choose sentences that are somewhat ambiguous:

1. “Better than I expected.”

2. “Agent was very helpful. Not.”

3. <<Something in Spanish>>

4. <<Something in Chinese>>

**Vendor Recommendations**

AI-driven predictive and prescriptive decision making on social media content will become a priority for the big platform vendors, as well as a wide variety of other companies. Incorporating video, audio, image and sentiment analysis into existing offerings will drive market adoption and company success.

Be prepared to articulate your AI strategy to partners (anyone whose content you interface with) and end users alike.

**Evidence**

1. Most Popular Social Networks Worldwide as of January 2021, Ranked by Number of Active Users.

**Note 1 Sentiment Analysis**

Sentiment analysis assesses the tone of emotion and, in some cases, its intensity (displeasure or disgust). For years, organizations have captured sentiment in a direct form – by asking customers how satisfied they were with their last purchase, for example. In the era of social media, firms are now exploring unstructured sentiments expressed in billions of Twitter messages and in millions of blogs and product reviews. (Source: Gartner Research)

**Note 2 Representative Vendor Selection**

The vendors in this Market Guide were selected based on the following criteria:

- Research from publicly available sources on most mentioned vendors.
Vendor is one of the following: specialist or social marketing management suite.

Hundreds of Gartner inquiry references.

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**Recommended by the Authors**

Some documents may not be available as part of your current Gartner subscription.

Demystifying Social Analytics

Market Guide for Social Marketing Management

How to Measure Social Marketing in 3 Steps

Use Social Media to Improve the Customer Journey Experience

Top Trends in Data and Analytics for 2021: From Big to Small and Wide Data

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