Magic Quadrant for Digital Experience Monitoring

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DEM tools monitor availability and performance to gauge end-user experience for modern and legacy applications. These tools offer the ability to monitor employee-facing and customer-facing applications. I&O leaders can use this Magic Quadrant to shortlist DEM vendors.

Market Definition/Description

This is the first version of the Magic Quadrant for Digital Experience Monitoring. It replaces the Market Guide for Digital Experience Monitoring.

Gartner defines digital experience monitoring (DEM) tools as those that measure the availability, performance and quality of the user experience (human user or digital agent) of critical applications. This can include internal users (employees and contractors), external users (customers and partners) or a digital agent connecting to an API. In addition to performance, DEM technologies enable observability of user behavior and journey based on their interaction with applications.

DEM tools allow I&O leaders to understand the availability, performance and reliability of business applications, networks and infrastructure by focusing on understanding the user experience. This is in contrast to other performance monitoring approaches, such as observability platforms, that understand the inner workings of applications.

“User” is defined broadly for DEM tools and may include internal and external users or even digital agents. Use-case examples include understanding the performance and availability of:

- Employees accessing applications critical to their role (e.g., intranet, CRM website)
- Outsourced third-party applications/services where there is no way to directly instrument the outsourced environment
- Customers accessing a commercial website (e.g., retail or online banking application)
- Digital agents connecting to important APIs, ensuring the availability and performance of critical digital components

DEM tools also:

- Help enterprises proactively identify application performance degradation from a user's point of view.
- Understand user behavior and journeys within the application.
- Help track important applications' SLAs.
- Enable benchmarking of application performance and issue identification before users are affected (e.g., before and after component upgrade).
- Provide data to help identify the best opportunities to improve website performance.

While DEM tools are useful in understanding customer behavior, they differ from customer experience analytics tools in that the primary focus is on measuring the impact of application performance on customers/users. Tools that focus primarily on customer experience are not included in this market.

DEM tools also differ from digital employee experience (DEX) tools, as DEM focuses more broadly on digital experience for end users (customers or employees) and infrastructure components. DEX focuses exclusively on the digital experience of employees through their endpoint devices. DEX incorporates organizational context and contextual employee sentiment data, and acts to resolve identified issues. Solutions offering endpoint-only monitoring are excluded from this research.

Must-Have Capabilities

The must-have capabilities for this market include:

- The ability to measure the health and performance of applications, network and infrastructure from a user point of view
- Real user monitoring (RUM) — record the interactions of real users within a web application
- Synthetic transaction monitoring (STM) — simulated user interaction through scripts, bots, network traffic simulation or API tests

Standard Capabilities

The standard capabilities for this market include:

- Multiple geographic points of presence for synthetic transaction monitoring, and the option to deploy private agents for increased visibility
- Analysis of RUM telemetry, including session replay and customer journey mapping
- SaaS application performance and availability monitoring (such as Salesforce and Microsoft 365)

- Benchmarking key performance metrics for establishing baselines and comparison and trend analysis
- Support for browser emulation and automation languages such as Selenium, Cypress, Playwright and Puppeteer

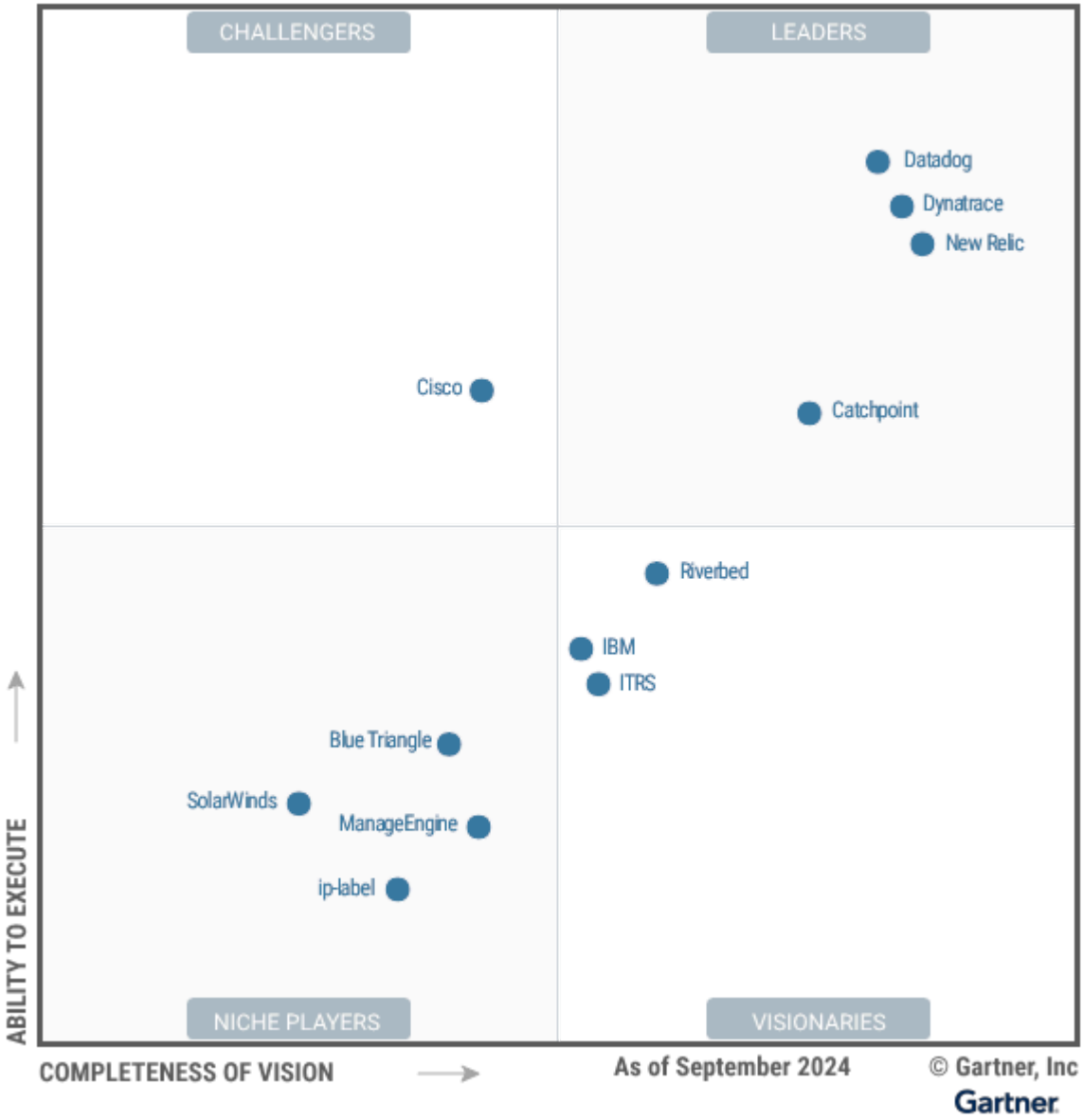
Optional Capabilities

The optional capabilities for this market include:

- Internet performance monitoring — the ability to provide insight into cloud services and the optimum paths available
- Thick client monitoring — the capability to deploy DEM to non-web-based interfaces
- Integration with adjacent domains such as security monitoring and software testing
- Mobile application monitoring via software development kits (SDKs)
- Integrations with application performance monitoring or observability platforms to see a drill-down at the transaction level that shows how the application is spending time when responding to a user request.

Magic Quadrant

Figure 1: Magic Quadrant for Digital Experience Monitoring



Vendor Strengths and Cautions

Blue Triangle

Blue Triangle is a Niche Player in this Magic Quadrant. Its product is focused on enhancing digital experience through the identification and quantification of digital friction on webpages, offering remediation guidance and measuring ROI. Its operations are mainly focused in the U.S., with additional operations in Europe. Its customers tend to be primarily in the retail sector. Other vendors, including service providers and software vendors, white-label Blue Triangle's product as part of their own solutions. Blue Triangle's planned enhancements include the auto-detection and correction of user experience issues, and increasing the use of AI in alerting, insights and reporting.

Strengths

- **Customer scale:** Blue Triangle clients include large enterprises, such as retailers, travel and healthcare companies, that have very high performance and availability demands on their customer-facing websites. Blue Triangle provides an easy-to-deploy, scalable and cost-effective solution that is able to meet these high-scale demands.

- **Software development:** Comparison and analysis of performance for different periods help DevOps/app developers check the impact of changes pre- and postdeployments, increasing agility and responsiveness in release cycles.

- **Hybrid visibility:** Blue Triangle's customer journey analysis provides insight into the common blind spot of hybrid apps that include both native apps and web apps, allowing IT operations teams visibility across these modern applications.

Cautions

- **Network insight:** Network path analysis is limited in functionality, making proactive trace analysis a challenge.

- **User interface:** Compared with leading vendors in this market, the product's UI appears dated. Customers have expressed challenges with areas such as visualization, data access and analytics.

- **Strategy:** While Blue Triangle performs well with its existing functionality, its strategy and roadmap are limited in comparison with other vendors. Clients making a strategic purchase for their DEM need to evaluate the roadmap against their future needs.

Catchpoint

Catchpoint is a Leader in this Magic Quadrant. Its Catchpoint Internet Performance Monitoring (IPM) platform is focused on providing visibility into real user experiences and the internet stack. Its portfolio of DEM solutions includes BGP monitoring, Tracing and Internet Sonar offers easy-to-understand, reliable Internet health information at a glance. Its operations are geographically diversified, and its customers tend to be large enterprises across a variety of industry sectors. Catchpoint continues to expand its node coverage, including last-mile locations, as well as further enhancements in its AI/machine learning (ML) automation and analysis capabilities.

Strengths

- **Product:** Catchpoint's Internet Performance Monitoring allows organizations to simulate and monitor user interactions with websites, applications and APIs from nearly 3,000 global vantage points in 300 cities across more than 90 countries. This monitoring also extends to last-mile network perspectives. Catchpoint also monitors internet outages globally that may impact customer business.

- **Global reach and scalability:** Catchpoint's network of monitoring nodes is considerably larger than competitors and is located in backbone, ISP, cloud, last-mile, BGP and mobile environments across the globe. This extensive reach allows for comprehensive monitoring of digital experiences from various geographic locations and network conditions.

- **Vision:** Catchpoint's innovation and market responsiveness demonstrate a clear understanding of client needs, particularly around modern distributed cloud-based applications.

Cautions

- **Geographic strategy:** Monitoring data is stored in data centers in the U.S., which may raise concerns for customers about compliance with local laws and regulations, privacy, legal and financial risks, and operational challenges.

- **Functionality:** Catchpoint lacks session replay and customer journey mapping, which may be important for some clients. Clients would need to install additional products from separate vendors to cover these monitoring types.

- **Pricing information:** Unlike other Leaders in this research, Catchpoint does not publish pricing information on its website. This lack of transparency is not in line with general trends in this area and hampers potential customers when estimating costs.

Cisco

Cisco is a Challenger in this Magic Quadrant. Cisco's DEM offering is Splunk Observability, which consists of AppDynamics, Splunk Platform, Splunk ITSI, and Splunk Observability Cloud. Splunk Observability focuses on providing full-stack observability, reducing mean time to detect (MTTD) and mean time to resolve (MTTR). It isolates user experience problems with user experience segmentation. Its operations are geographically diversified, and its customers tend to be large enterprises across a variety of industries. The vendor is focusing investments on providing a unified DEM experience across its product offerings and enhancing troubleshooting integration.

Strengths

- **Deployment options:** AppDynamics can be either SaaS or self-managed, allowing clients flexibility around their choice of deployment. Some industries and regions may require an on-premises offering.

- **CI/CD integration:** AppDynamics Synthetic Transaction Monitoring (STM) can be integrated with the continuous integration/continuous delivery (CI/CD) pipeline to be invoked during application rollout for testing at the time of release to determine and automate the next action, such as continuing the release or rollback.

- **Market presence:** Both Cisco and Splunk are brands with significant market presence and are frequently mentioned in Gartner client inquiries. Both have an extensive, diverse customer base that relies on these products to monitor their critical infrastructure and workloads.

Cautions

- **Portfolio complexity:** After Cisco's acquisition of Splunk in March 2024, the DEM portfolio lacks coherence, with the overall solution consisting of multiple components with integration being a work in progress. This has caused confusion among clients who are unsure which components from Cisco best serve their needs.

- **Functionality:** To gain visibility into IPM, AppDynamics Real User Monitoring (RUM) requires a token to be enabled through an out-of-the-box integration with Cisco ThousandEyes, a separate paid product that was not included as part of their DEM solution for this research.

- **Cost control:** AppDynamics DEM uses a token-based system for RUM licensing and metered durations for synthetic monitoring, which can add complexity and potentially lead to unexpected costs if not carefully managed.

Datadog

Datadog is a Leader in this Magic Quadrant. Its Synthetic Monitoring and Testing, Real User Monitoring (RUM), Product Analytics, Session Replay and Error Tracking capabilities are focused on end-to-end observability and reducing MTTD and MTTR. Datadog's DEM solution is part of its wider observability platform, offering full stack observability for modern applications.

Its operations are geographically diversified, and its clients tend to be large enterprises across a variety of industries. Planned enhancements to the product include automated investigations using root cause analysis (RCA) and the ability to generate code snippets for fixes and streamline incident management.

Strengths

- **Product features:** Datadog Mobile RUM helps monitor the quality of experience (QOE) and provides insights into the end-user experience for applications running on smartphones and tablets, as well as smart TVs powered by Apple tvOS, Android TV, and Roku — a differentiated offering in this area. Gartner clients who develop or support applications on media streaming devices will find the native support of these operating systems important.

- **Protect sensitive data:** Datadog's Sensitive Data Scanner can automatically discover, classify and redact sensitive data across logs, application performance monitoring (APM) spans and RUM events at ingestion. This, coupled with client-side controls, protects organizations against data privacy risks.

- **Real mobile device testing:** Datadog's Mobile Application Testing replays tests on real mobile devices rather than using emulation. Organizations desiring synthetic monitoring that most closely represents the end-user perspective may find using real hardware a compelling capability.

Cautions

- **SaaS-only solution:** Datadog is only available as a SaaS solution. While this is the preferred mode for most clients, some organizations might require a self-managed or self-hosted solution to comply with regulatory, compliance or data residency policies.

- **Usage-based pricing:** The vendor's usage-based pricing requires customers to manage their DEM tool expenses by adjusting sampling rates for RUM and the frequency, number of platforms, locations and retries for STM tests. Cost-related reporting and alerting are available; however, customers may incur unexpected costs without manual oversight.

- **No automated IPM capability:** IPM can be achieved only by manually analyzing RUM performance or STM traceroute data. Organizations wanting the ease of AI and analytics to surface internet impacts on application performance will find Datadog lacking in this area.

Dynatrace

Dynatrace is a Leader in this Magic Quadrant. Its DEM offering includes capabilities for RUM, synthetics and session replay augmented by Dynatrace's Davis AI engine. The Dynatrace platform focuses on delivering end-to-end observability that correlates back-end telemetry with user experience. Dynatrace has clients in all major geographies, including Latin America and Asia/Pacific (APAC). Its customers tend to be large enterprises and technology-centric companies. Future investments include leveraging its Davis AI and Davis CoPilot to deliver enhanced experience insights and business analytics.

Strengths

- **Unified observability platform:** The Dynatrace platform extends beyond digital experience to include full-stack observability. This enables application developers and site reliability engineering (SRE) teams to combine experience data with application and infrastructure telemetry to troubleshoot and resolve issues down to the code level.

- **Use of AI:** Dynatrace's predictive AI capabilities extend to user experience and business-oriented use cases, including probabilistic forecasting of business key performance indicators (KPIs), which can facilitate targeting customers who experience poor performance with promotional campaigns.

- **Customer-centric:** Dynatrace demonstrates a strong understanding of client needs, particularly regarding the transition of applications to modern architectures. This understanding has led to innovations such as their AI and Grail, the Dynatrace data lakehouse, which facilitates improved digital experience monitoring.

Cautions

- **Platform breadth:** For clients who are concerned only with end-user experience and not engaged in developing their own applications, Dynatrace's offering has a steeper learning curve and may be more expensive than a stand-alone solution.

- **Suitability for SMBs:** Dynatrace's target audience is large enterprises with use cases encompassing multiple personas. While alternative channels, such as public cloud marketplaces, make it more accessible, small and midsize businesses may find that cost justification limits Dynatrace's use to monitoring only the most business-critical systems.

- **Pricing caution:** Using the Dynatrace Platform Subscription (DPS) pricing model, clients draw down against a committed annual minimum spend, greatly benefiting from usage flexibility. Clients may need to implement internal controls based on Dynatrace's trending, forecasting and alerting capabilities to avoid overspend against their original estimate, which can be particularly easy to do with synthetics and real user monitoring.

IBM

IBM is a Visionary in this Magic Quadrant. Its IBM Instana offering includes capabilities for real user monitoring, synthetic monitoring, as well as IBM NS1 Connect for DNS insights. IBM's Instana observability platform is offered as both a SaaS solution and a self-hosted offering that uses a single-agent architecture. IBM Instana's clients are concentrated in North America and Western Europe, with other customers distributed globally. Its client base is midsize-to-large enterprises across a wide range of industries. Planned enhancements include further integration with IBM's AI toolset, including IBM Concert and watsonx for generative AI (GenAI) insights and automated actions.

Strengths

- **Market presence:** IBM's global reach, strong customer base and extensive product portfolio make it a strong choice for larger organizations seeking a single vendor to cover their broader observability needs.
- **Deployment models:** Instana provides a range of deployment modes, including the capability to be deployed as a managed SaaS offering on various cloud providers or as a self-hosted, on-premises solution. This flexibility provides clients with a deeper level of control over their data sovereignty to align with regulatory or national requirements.
- **Use of AI:** The additions of anomaly detection using IBM Watson technology and the "Smart Alert" function to the product functionality are rated highly by clients, as they reduce operator toil and speeds time to problem notification.

Cautions

- **Features:** IBM Instana lacks capabilities that are offered by Leaders in this area. For example, it lacks capabilities for session replay, and network path analysis is only available through other IBM products, such as SevOne. However, integration with these products remains a challenge.
- **Pricing:** Instana's core observability platform has a price-per-host metric; however, if a customer wants to execute synthetic tests from Istana-managed points of presence (PoPs), they will need to pay separately for it. This may challenge the ability of enterprises to perform accurate cost estimates.
- **Support and responsiveness:** Some customers have reported issues with the responsiveness of IBM's customer support and a slow escalation process, which can delay issue resolution.

ip-label

ip-label is a Niche Player in this Magic Quadrant. Its Ekara platform provides an integrated solution for monitoring internal and external client-facing applications, including Citrix's virtual applications and locally installed desktop apps. ip-label offers both SaaS and on-premises deployment options, and its portfolio includes Ekara Green, which analyzes website sustainability. Its clients are largely based in Europe, with others in LATAM, APAC and North America. Its clients tend to be enterprises across a range of verticals. Planned enhancements include the use of AI for security and anomaly detection.

Strengths

- **Thick client monitoring:** ip-label was the only solution assessed that included thick client application monitoring. Many legacy applications do not have a fully functioning web interface, which can limit the usefulness of other digital experience monitoring solutions in this scenario.
- **No-code STM:** Ekara Studio is a true no-code development tool for creating STM scripts, which Ekara calls "user journeys." STM replay of user journeys is constructed using graphical blocks for simple and complex actions. ip-label uses mobile devices for synthetic user journeys using real customers' mobile applications.
- **Pop-up management:** A common problem for STM replay is unexpected window pop-ups on web applications that trigger script failures, leading to false positives. Ekara includes the option for its Magic Wand feature during replay, which leverages AI to manage unexpected pop-ups, allowing normal script replay to continue.

Cautions

- **User interface:** The Ekara interface appears dated compared to its competitors and may hamper adoption and hinder time to value during implementation.
- **Functionality:** Ekara lacks the breadth of functionality of many of its competitors, which may fail to attract customers that require a more comprehensive solution. Organizations should confirm that Ekara provides the required functionality.
- **Documentation:** Compared with other vendors in the market, the product documentation and the Ekara website are limited and difficult to navigate.

ITRS

ITRS is a Visionary in this Magic Quadrant. Its Uptrends is a SaaS product offering synthetic monitoring, real user monitoring and API monitoring. ITRS Uptrends integrates with the wider ITRS portfolio for observability, which includes application, infrastructure and cloud monitoring products. Its operations are focused in North America and Europe, with a smaller percentage in LATAM and APAC, and serve a wide range of industries.

Strengths

- **Ease of use:** ITRS Uptrends' console and interface are coherent and intuitive, allowing for quick adoption of the product. This will speed time to value with minimal impact on IT operators' time.
- **Full trial:** Uptrends also provides potential clients the ability to explore full product functionality for 30 days without commitment. This allows users to experiment with the product and build their own proof of concept to determine suitability.
- **Portfolio:** ITRS has a wide portfolio of monitoring solutions that integrate with Uptrends, offering the ability to extend observability across the enterprise while remaining functional as a stand-alone offering.

Cautions

- **Limited functionality:** ITRS' solution lacks key capabilities, such as session replay, and does not enable customer journey mapping. This limits its ability to cover common DEM use cases for IT operations teams.
- **Market visibility:** General awareness and adoption of ITRS among Gartner clients are relatively low.
- **Pricing model:** ITRS Uptrends pricing is based on a number of different metrics, including credits, minutes and an overall license fee. This makes estimation and comparison of pricing difficult for clients budgeting their costs.

ManageEngine

ManageEngine is a Niche Player in this Magic Quadrant. Its SaaS-based product, Site24x7, is the cloud platform focused on full-stack observability. Applications Manager and OpManager Plus are self-hosted offerings that provide application performance insights and full stack observability, respectively. Its operations are geographically diversified, and its customers tend to be small to midsize enterprises across a variety of industries. The vendor is investing in AI-driven root cause analysis (RCA), focusing on WAN observability for data correlation from multiple sources to provide quicker and more accurate problem resolution.

Strengths

- **Global presence:** ManageEngine can support path analysis based on multiple global locations. Customers have the option of choosing multiple global or private locations for setting up website monitoring.
- **Market presence:** ManageEngine has a significant presence in the market with its other IT operations management (ITOM) tools, and also boosts its brand awareness with multiple free tools and on-demand product training for implementations and use cases.
- **Pricing:** ManageEngine's pricing model is very competitive compared to the competition, especially when combined with the broader offerings from ManageEngine, including IT service management (ITSM) and security products.

Cautions

- **Visualization:** The volume of raw data made available as-is for visualization in some scenarios limits its usefulness.
- **Scale issues:** ManageEngine customers report complexity in configurations and management at scale, including degraded performance. They also find integrations with third-party tools challenging.
- **Functionality:** The product lacks customer journey mapping and session replay, hampering business owners' ability to make decisions based on insights.

New Relic

New Relic is a Leader in this Magic Quadrant. Its New Relic DEM is offered as a SaaS and integrates DEM with APM, AI monitoring, infrastructure monitoring, security and log management. Its operations are mainly in the U.S. and EMEA, and its customers tend to be large enterprises across a variety of industries. New Relic plans for its platform to evolve into a self-healing, autonomous system that automatically integrates and updates digital estate data, enabling automated detection, proactive root cause analysis and auto-remediation to predict and prevent issues with minimal human intervention.

Strengths

- **Integrated solution:** New Relic DEM capabilities complement the overall observability platform; a comprehensive, extensible solution that provides a deep understanding of how application performance and infrastructure health impact user experience.
- **Ease of use:** New Relic's UI provides a modern, user-friendly interface with a range of reporting options, as well as ease of configuration.
- **Vendor support:** Gartner clients report high levels of satisfaction with the vendor account and support team, noting that they are responsive and open to implementing feedback and enhancement requests.

Cautions

- **Ease of use:** Gartner clients reported challenges in mastering the vendor's proprietary query language, New Relic Query Language (NRQL, based on SQL). New Relic has introduced a natural language interface that automatically creates NRQL queries, allowing nontechnical and business users access to observability insights.
- **Geographic footprint:** New Relic's service delivery platforms are located in the U.S. and EU (Germany). Organizations outside of their core regions, particularly those in APAC, may need to confirm that the company's offering meets any region-specific performance or sovereignty requirements. Note that synthetic tests can be executed from private locations globally.
- **Pricing:** New Relic's observability platform pricing model is based on the number of users and the volume of telemetry ingested, but pricing for synthetics does not follow this model. Users obtain a set amount of synthetic tests based on the type of license (pro or enterprise), and this does not increase with the number of users. Exceeding the allocated quantity requires customers to purchase extra synthetic tests, creating cost management complexity.

Riverbed

Riverbed is a Visionary in this Magic Quadrant. Its Riverbed Aternity product, sold primarily as a SaaS and also available as a self-hosted solution, is focused on digital experience monitoring across endpoints, applications, infrastructure, network and DEX, with mobile-based application synthetics and customer service management. Its operations are focused mainly in the U.S. and EMEA, and its customers tend to be large enterprises across a variety of industries. Future

enhancements include further investments in ML and GenAI technologies to enable more sophisticated data analysis, predictive insights and automated responses to performance issues.

Strengths

- **Ease of use:** Customers report positive sentiment regarding the intuitive interface, which gives an integrated view across devices, networks and applications, reducing operator load for onboarding and management.
- **Portfolio:** Riverbed's Riverbed IQ product is an interesting differentiator for Riverbed. It ingests telemetry from the Aternity products and allows for cross-domain analysis and correlation, which may help improve mean time to resolution.
- **Product:** Riverbed Aternity's network path analysis functionality allows for easy visualization of the performance of the underlying network infrastructure, enabling IT operations teams to quickly identify performance issues at different layers in the ecosystem.

Cautions

- **Pricing transparency:** Unlike leaders in this area, Riverbed's pricing is not available on the vendor's website. This makes it challenging for customers wishing to compare the cost of the solution with that of other DEM vendors.
- **No session replay:** Not having session replay may result in reduced user insight and problem diagnosis, hindering the potential for optimization opportunities.
- **Dependencies:** The Aternity User Journey Intelligence tool is an OEM rebadging of Blue Triangle (another vendor in this research). OEM software may be subject to changes based on contractual relationships between vendors, which can cause uncertainty long term for clients.

SolarWinds

SolarWinds is a Niche Player in this Magic Quadrant. SolarWinds products, including Pingdom for DEM, are primarily focused on using STM to track the availability and performance of websites and URI endpoints. These products monitor real user activity and experiences based on page views, load times and location, among other factors. Its operations are geographically diversified, and its customers tend to be small, midmarket and emerging enterprises. The vendor plans to evolve and broaden its GenAI capabilities for incident intelligence and to improve root cause analysis.

Strengths

- **Detailed analysis:** SolarWinds' products enable a proactive approach to network path analysis by using existing probes or creating new ones, providing a hop-by-hop analysis between the probe and the application.
- **Dashboards:** Customers have expressed positive sentiments regarding SolarWinds' dashboarding capabilities, highlighting the simple onboarding experience and fast time to value.

- **Partners:** SolarWinds has a diverse partner program that helps with the promotion, distribution and support of the vendor's products across different regions to a wider audience.

Cautions

- **Portfolio complexity:** SolarWinds' extensive range of products supports various observability use cases, including APM, database and infrastructure; however, this also contributes to the complexity of the monitoring tool landscape, which can be confusing for users.
- **Integration:** Although SolarWinds has a wide array of integrations, some customers frequently cite challenges in integrating with third-party tools, which limits the potential use cases and extensibility.
- **No mobile monitoring:** Mobile app monitoring, an optional capability for this research, is a gap in SolarWinds' latest version; however, it is on the vendor's roadmap.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

As this is a new Magic Quadrant, no vendors were added.

Dropped

As this is a new Magic Quadrant, no vendors were dropped.

Inclusion and Exclusion Criteria

For Gartner clients, Magic Quadrant research identifies and then analyzes the most relevant providers and their products in a market. By default, Gartner uses an upper limit of 20 providers to support the identification of the most relevant providers in a market. In specific instances where the intended research value to our clients might otherwise be diminished, the upper limit may be extended by Methodologies.

The inclusion criteria represent the specific attributes that analysts believe are necessary for inclusion in this research.

In addition, the vendor must rank among the top organizations using the Customer Interest Indicator (CII) defined by Gartner for this Magic Quadrant. CII is calculated using a weighted mix of internal and external inputs that reflect Gartner client interest, vendor customer engagement and sentiment.

To qualify for inclusion, providers must meet the following inclusion criteria:

Market Participation Inclusion Criteria:

- Provide generally available capabilities as of 1 August 2024. General availability means the product or service is widely available to all customers for purchase through normal sales channels.
- Sell the DEM tool directly to paying customers without requiring them to engage professional services help. The vendor must provide at least first-line support for these capabilities, including any bundled open-source software. This includes but is not limited to comprehensive product documentation, installation guidance and reference examples.
- Demonstrate an active product roadmap, go-to-market and selling strategy for their DEM solution.
- Have phone, email and/or web customer support. They must offer contract, console/portal, technical documentation and customer support in English (either as the product's default language or as an optional localization).

Capabilities Inclusion Criteria:

- The DEM tool must offer all must-have capabilities and three of the five standard capabilities described in Gartner's market definition.
- The DEM tool must be delivered via SaaS. Vendors may also provide self-hosted alternatives for clients that require them, but the self-hosted options are outside the scope of this research.

Performance Threshold Achievement:

- The DEM tool must have at least 50 paying, production (non-beta-test) customers in at least two geographic regions (Asia/Pacific, EMEA, Latin America or North America) excluding sales to managed service providers (MSPs), or
- The DEM tool must have generated at least $5 million in annual generally accepted accounting principles (GAAP) revenue during the 12 calendar months prior to the vendor's receipt of Gartner's Magic Quadrant welcome packet.

Honorable Mentions

Gartner tracks more than 30 vendors in the DEM space. Although this research identifies 12 vendors that have met our inclusion criteria, the exclusion of a vendor does not mean that the vendor and its products lack viability. Described below are several noteworthy vendors that did not meet all of our inclusion criteria, but could be appropriate for clients, contingent on requirements:

- **Broadcom:** Broadcom acquired AppNeta in 2022. AppNeta provides synthetic monitoring for network and application performance. Broadcom did not meet the technical requirements for real user monitoring for inclusion in this research.

- **Checkly:** Checkly provides Synthetic Monitoring and tracing using the "monitoring as code" paradigm, ideal for integrating into CI/CD pipelines and DevOps workflows. Checkly did not meet the technical criteria for inclusion in this Magic Quadrant.

Evaluation Criteria

Ability to Execute

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria	*Weighting*
Product or Service	High
Overall Viability	Low
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	Medium
Operations	NotRated

Source: Gartner (October 2024)

Completeness of Vision

Gartner analysts evaluate vendors on their ability to understand current market opportunities to create and articulate their vision for future market direction, innovation, customer requirements and competitive forces. Ultimately, vendors are rated on their vision for the future and how well that maps to Gartner's position.

General evaluation criteria are available at the end of this research. For this market, assessments were primarily based on:

- **Market Understanding:** This criterion considers a vendor's ability to understand customer needs and translate them into products. Vendors that show a clear vision of their market listen, understand customer demands, and can shape or enhance market changes with their added vision. Consideration is given to understanding the rapidly evolving landscape around service performance.

- **Marketing Strategy:** This criterion looks for clear, differentiated messaging consistently communicated internally and externalized through social media, advertising, customer programs and positioning statements. Consideration is given to new market outreach, innovative marketing initiatives and true differentiation.

- **Sales Strategy:** This criterion considers whether the vendor has a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, communication and partners that extend the scope and depth of market reach, expertise, technologies, and the vendor's customer base. Consideration is given to channel strategy and understanding the buyers and influencers involved in selection of observability platform products.

- **Offering (Product) Strategy:** This criterion evaluates whether a vendor's approach to product development and delivery emphasizes market differentiation, functionality, methodology and features that cover current and future requirements. Consideration is given to quality and cadence of vendors' product roadmap and investment priorities into adjacent market segments.

- **Business Model:** This criterion looks at the design, logic and execution of the vendor's business proposition to achieve continued success. Consideration is given to vendors' business, value proposition, ability to anticipate shifts in licensing/pricing models and relationships with open-source communities.

- **Vertical/Industry Strategy:** As observability platforms tend not to be industry-specific, evaluating these in detail is not a key element of this research. Where vertical or industry differentiation is relevant, questions are included in other criteria categories.

- **Innovation:** This criterion looks at direct, related, complementary and synergistic layouts of resources, and expertise or capital for investment, consolidation, defensive or preemptive purposes. Consideration is given to the level of investment in product development in new areas related or adjacent to observability, third-party and partner relationships and integrations, and the use of AI/ML and other novel capabilities.

- **Geographic Strategy:** This criterion evaluates the provider's strategy to allocate resources, skills, and offerings to meet the needs of geographies outside its native region, either directly or through partners, channels, and subsidiaries. Additional consideration is given to employee distribution, SaaS platform locations, tailored go-to-market strategies, and the depth of regional partners for existing and new customers.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	NotRated
Innovation	High
Geographic Strategy	Low

Source: Gartner (October 2024)

Quadrant Descriptions

Leaders

Leaders exhibit strong execution and vision scores and exemplify the functionality required for IT organizations to continuously evaluate and improve DEM. Leaders have the broadest set of capabilities, strongest roadmaps, a larger installed base, and cover the most geographic regions and industries.

Challengers

Challengers exhibit a strong set of technologies, marketing and sales execution, and intellectual property — as also exhibited by Leaders — but do not have the requisite strategic support, vision, innovation or roadmap to compete in the Leaders quadrant. Many Challengers tailor solutions to specific market segments or use cases.

Visionaries

Visionaries exhibit strong strategic support, vision, innovation and a robust roadmap but have not yet amassed the requisite size, installed base, platform breadth or integration points to compete in the Leaders quadrant.

Niche Players

Niche Players exhibit a consistent ability to address specific use cases, geographic regions, market segments or verticals. Their offerings, however, generally fail to provide a breadth of features and cannot scale to be relevant to all buyers.

Context

The goal of any Magic Quadrant is to provide a level view of comparable products (size, capability and corporate structure) to address the demands of a wide variety of buyers. Not every company's requirements are identical. We encourage clients to review the accompanying Critical Capabilities research to assess use case and functionality requirements, and this research to align industry expertise, vision, technology and cost requirements with the right vendor, regardless of the vendor's quadrant.

DEM is becoming an increasingly important part of monitoring as IT organizations seek to improve the digital experience and align with the business. For many organizations looking to understand application performance, a broad observability platform may not fit their needs, budget or skill set, and DEM can provide critical insight while meeting these constraints.

Vendors in this market come from a variety of markets and infrastructure and application monitoring specialties. For example, some focus on pure-play RUM or front-end performance, others on network impact, or full observability, or specific use cases of thick client monitoring.

DEM technologies of synthetic monitoring and real user monitoring have existed for many years, both as stand-alone solutions and as components of application performance monitoring tools. They have been widely deployed in production environments monitoring business-critical applications in a range of industries. Therefore, the DEM marketplace exhibits behavior consistent with a more mature market.

Market Overview

Customers access modern applications in a number of ways, such as browsers, mobile applications and APIs, as well as via traditional desktop applications. The ability to monitor and optimize the end-user experience across digital platforms is a critical aspect of modern IT operations. Organizations seeking to learn about not only their customers' activity and habits but also the performance of their own web applications can use the insights DEM provides to optimize the customer experience, improve satisfaction and boost conversion rates.

However, this insight raises challenges of its own. As organizations seek to gain insight into their customers' activity and habits, privacy continues to be a concern for vendors, clients and regulators. Real user monitoring has access to sensitive personal information. IT leaders in charge of such sensitive data must ensure that any DEM offering includes the ability to mask,

anonymize and aggregate as core functionalities. Innovations in this area include using AI for pattern recognition to identify sensitive data, rather than relying solely on human operator identification.

The DEM market has grown by 14.5% over the last two years (see Market Share Analysis: ITOM, Health and Performance Analysis Software, Worldwide, 2023).

Growth in this market is driven by digital business transformation, the importance of user experience, and the widespread use of externally hosted and SaaS-based applications, which limit IT's insight and control. DEM measures performance from the user's point of view, helping ensure that these applications and their dependent services are always available and performing well.

AI and machine learning will play a key role in the future of DEM. These technologies are being leveraged to automate the process of monitoring and analyzing the user experiences, thus enhancing efficiency. AI and ML are used to predict user behavior, identify potential issues before they impact users, and provide actionable insights to improve user experiences.

Evidence

Market Share Analysis: ITOM, Delivery Automation Software, Worldwide, 2023

Gartner New Customer Survey (NCS): A survey based on DEM references was conducted as part of data-gathering efforts to help Gartner build existing knowledge of the selected vendors in this market for the Magic Quadrant for Digital Experience Monitoring. As part of the process all 12 selected vendors were asked to submit a minimum of 10 references that had not been provided previously and represented DEM implementations. The vendors provided reference contact information, which we used to invite the references to complete a 10-minute survey. A total of 76 references completed the survey from 8 August 2024 through 23 August 2024. Vendor reference data is different from primary research and is not a representative knowledge base of the DEM market. The 76 references do not represent customers in the overall DEM market, in an exhaustive manner. Rather, they represent select customers that the participating vendors chose to share with Gartner and that elected to participate as reference checks.

Customer Interest Index (CII): Gartner's CII used for this Magic Quadrant calculates and ranks included vendors using a balanced set of measures that include, but are not limited to:

- Gartner client interaction and Gartner.com search volume and trend data.
- Customer interest and engagement as represented by various social media and other platform engagement measurements.

Social media analytics: Gartner conducts social listening analysis leveraging third-party data tools to complement or supplement the other fact bases presented in this document. Due to its qualitative and organic nature, the results should not be used separately from the rest of this research. No conclusions should be drawn from this data alone. Social media data in reference is from 1 January 2021 through 31 May 2024 in all geographies (except China) and recognized languages. *Social media analytics study results do not represent global findings or the market as a*

whole but reflect the aggregate crowdsourced opinion of the respondents commenting about the topic on social media.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "**Guiding Principles on Independence and Objectivity**." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.