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The 2020 SEO Platform Forrester Wave Report

FEATURING RESEARCH FROM FORRESTER

The Forrester Wave™: SEO Platforms, Q3 2020

ARE YOU BEING FOUND?

Organic search has always been a key pillar in every digital marketing strategy. 2020 has been a massive catalyst for buyers and consumers to search "from home," exposing the extreme importance of your SEO strategy. In fact, 87 percent of online purchases begin with a search engine.

So the big question is— are you being found? Every search is an opportunity to gain visitors, marketshare, and most importantly, revenue.

A truly great SEO platform functions as a partner to brands to scale their Organic Marketing program— ensuring teams create valuable content, that this content can be found, and that they can measure the effectiveness of their efforts.

Conductor received the highest score in the current offering category in The Forrester Wave™: Search Engine Optimization (SEO) Platforms, Q3 2020. In addition to being rated among the top providers by industry experts, Conductor is the number one rated enterprise platform by customers on Trustradius and G2.

IN THIS DOCUMENT

- 1 The 2020 SEO Platform Forrester Wave Report
- 5 The Forrester Wave™: SEO Platforms, Q3 2020
- 20 About Conductor

SEO PLATFORMS ARE CRITICAL FOR SCALING YOUR ORGANIC MARKETING PROGRAM

Making sure your digital presence is optimized to be found by potential customers is a crossfunctional process that impacts many teams across the organization. It is for this reason that the right SEO Platform, one that aligns teams and processes, can have a meaningful impact on your results. With that in mind, here is what you should expect from a modern SEO Platform:

- Insight into customers and competitors to inform strategy. Understanding what your potential customers want is the essence of organic search. An enterprise platform should arm you with the most accurate market. Can you do on-demand research on keywords, topics, audience sentiment, demographic insights, competitive research, and more all in one spot?
- Collaboration across teams. Each of your teams within content, web and SEO has different strategies, workflows, tools, and goals, yet they all must work together. Does your enterprise platform bring in different teams across the organization to make sure SEO is a shared priority? Does it have specific tools and integrations for each of these functions?
- The ability to create results-driven processes. The currency for Organic Marketing success is agility. One of the biggest things that holds teams back is not being able to act quickly or at all on next steps. That's where an enterprise platform comes in. Does your enterprise platform flag problems and suggest solutions? Does it help implement those solutions? Can it predict the ROI of each proposed action?

- Seamless integration of your most used systems. Your teams have the tools and workflows that they already like using. A true enterprise platform doesn't want to displace those tools but rather integrates into those systems and data sources to make them even more valuable. For instance, does your technology seamlessly integrate into your web analytics? Does it connect into your team's workflow tools like Asana and Jira? Does it enable instant changes to your CMS system?
- Clear, incisive data reporting. Your reports need to deliver answers to specific questions coming from
 diverse stakeholders. Your enterprise reporting should be flexible enough to deliver both incredibly granular
 reports for the most technical users and high-level snapshots for your global executives.
- Flexible strategic services. A true enterprise platform marries technology and services together to help you achieve your goals. Waiting for a "monthly call" does not enable you to move faster. A great platform will include 24-hour support, a wide range of service offerings like site audits to migrations, and real-time workflow requests from the platform, as soon as you identify something to be done.

CONDUCTOR DELIVERS A TRUE ENTERPRISE SEO PLATFORM

Conductor is the only enterprise SEO platform to deliver across these pillars with unique capabilities.

Power Your Strategy with the Most Comprehensive & Complete Dataset

Conductor is your one-stop shop for on-demand customer intelligence and search insights. With Conductor, you get access to over 16 billion global keywords, best-in-breed social data with TalkWalker, global keyword data thanks to SEMrush and Dragon Metrics, and more— all in one platform.

Empower a Team Approach to Organic Marketing

SEO is a team sport, requiring collaboration from diverse stakeholders. That's why we've built a solution that, according to the Forrester report says, "solidly supports collaboration across the variety of stakeholders in the SEO process." From role based views to an easy-to-use Chrome extension, Conductor delivers solutions that foster collaboration.

Expedite Your Processes to Get More Done

What holds back progress? Lack of agility and action. Conductor helps teams unlock new agility through push-button changes to live content, directly in-platform. Want to make a content optimization in one-click? You can with Conductor.

Track Anything. Measure Everything. Share Impact.

The bottom line is always most effective when you can show the right stakeholders the right information. Enterprise reporting through Conductor's SEO platform is designed to be flexible to measure what matters most for your business across channels.

All your Systems Integrated in One Platform

Your teams never have to compromise with Conductor. We integrate with the systems and tools your team already uses like Google Analytics, Asana, Jira, Search Console, Deepcrawl, and more. We get all your systems and stakeholders working together in one platform.

Get Support with Industry-Leading Services

Conductor is more than a platform – we're a partner committed to your digital marketing success. Get expert support, strategic guidance, and help with execution from the largest, most experience team of SEO experts in the industry.

Ready to learn more about Conductor's industry-leading platform? Get in touch with our team to see our solution in action.

The Forrester Wave™: SEO Platforms, Q3 2020

The Seven Providers That Matter Most And How They Stack Up

by Collin Colburn September 9, 2020

Why Read This Report

In our 28-criterion evaluation of SEO platform providers, we identified the seven most significant ones — Botify, Conductor, Moz, Searchmetrics, SEMrush, seoClarity, and Siteimprove — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals select the right one for their needs.

Key Takeaways

SEO Platforms Aren't Currently Meeting Client Needs

Forrester's research uncovered a market in which there are no Leaders; Conductor, seoClarity, Siteimprove, and SEMrush are Strong Performers; and Botify, Searchmetrics, and Moz are Contenders.

Workflow And Process Management, Auditing, And Innovation Are Key Differentiators

As the SEO platform landscape attempts to evolve to serve client's needs, collaboration support, technical and content auditing, and the vendor's ability to innovate will dictate which providers will lead the pack. Vendors that can provide improved keyword data and auditing capabilities along with more innovative thinking will position themselves to successfully deliver a platform to unify the SEO process for their customers.

The Forrester Wave™: SEO Platforms, Q3 2020

The Seven Providers That Matter Most And How They Stack Up



by Collin Colburn with Mary Pilecki, Chahiti Asarpota, and Christine Turley September 9, 2020

Table Of Contents

Today's SEO Platforms Don't Unify The SEO Process

Evaluation Summary

Vendor Offerings

Vendor Profiles

Strong Performers

Contenders

Evaluation Overview

Vendor Inclusion Criteria

Supplemental Material

Related Research Documents

Now Tech: Search Engine Optimization (SEO) Technologies, Q1 2020

Ten SEO Best Practices That Your Site Can't Live Without

Top-Notch SEO Requires Seamless Coordination, Not Another Siloed Team



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Today's SEO Platforms Don't Unify The SEO Process

SEO is a critical performance marketing mechanism that helps companies drive quality traffic to their websites in order to drive leads, sales, and revenue. Marketers across all industries focus on improving their website experiences, seek greater visibility in organic search results, and want to build a crossfunctional SEO process. A key part of that process is the technology and automation that SEO platforms offer. But no single SEO platform currently meets most of marketers' needs, which is why we found no Leaders in this study. In fact, during our research, we heard client references often describe their platform simply as "a reporting tool," and found that on average, individual clients use three SEO platforms to accomplish their SEO strategy. We see a market that desperately needs consolidation and strategic innovation. Vendors that can support the end-to-end needs of marketers' SEO processes and move the SEO industry from a niche skill to a key performance marketing channel will emerge as Leaders. Specifically, marketers managing the SEO process need a platform that:

- Has robust keyword data to fuel content creation. Although marketers adopt an SEO platform to perform keyword research, they tell us they need multiple SEO tools to do this; they receive conflicting data because websites rank keywords differently and use volatile and inconclusive practices or sources for acquiring this data, such as scraping Google search results.² SEO platforms often lack supplemental data to strengthen keyword research. Only Conductor uses social media listening data to enrich its organic search keyword data. Marketers need a more robust keyword data set that includes multiple channels like search, social, and word-of-mouth to formulate a holistic picture for what content customers need.
- > Provides solutions for all SEO stakeholders. At SEO's core, there are two primary functions: technical SEO and content SEO.³ Within each of those functions exists many stakeholders, from web developers to content marketers, that contribute to the technical and content optimizations. But no SEO platform provides best-in-class functionality for both functional areas; technical and content stakeholders must use different tools to fit their needs, which impedes internal collaboration.
- Focuses on expanding beyond organic search. Marketing leaders need aggregated and enriched insights across channels that SEO platforms don't provide. SEO platforms should expand their use cases to paid search. A client reference noted, "There's no reason these platforms couldn't be made better to support paid search efforts." SEO platforms go unnoticed in the marketing technology (martech) landscape because of their narrow focus. Marketers need an SEO platform that works with other martech providers like CRM, web analytics, and content marketing platforms to evangelize the use of organic search insights and determine where synergies exist for future integrations and innovation.

Evaluation Summary

The Forrester Wave[™] evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on SEO technologies.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.



FIGURE 1 Forrester Wave™: SEO Platforms, Q3 2020

THE FORRESTER WAVE™

SEO Platforms

Q3 2020



*A gray bubble indicates a nonparticipating vendor.



FIGURE 2 Forrester Wave™: SEO Platforms Scorecard, Q3 2020

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	koungid!	iin ^{is} Botif	y Cou	NOŽ	Sea	S. SEM	Seo	oiteir
Current offering	50%	2.07	4.15	1.85	2.27	2.65	3.65	2.66
Workflow and process management	15%	1.00	4.34	1.00	2.34	1.00	4.34	1.66
Auditing	10%	3.10	3.30	1.30	1.60	2.50	4.10	1.60
Keyword research data	10%	3.00	5.00	1.00	1.00	1.00	1.00	3.00
Optimization and implementation	6%	3.00	4.00	2.00	3.00	3.00	4.00	2.00
Opportunity forecasting	10%	1.00	5.00	3.00	5.00	3.00	5.00	1.00
Local SEO	7%	1.00	5.00	5.00	1.00	5.00	5.00	1.00
International SEO	5%	1.80	5.00	1.30	2.70	4.20	4.10	3.40
Reporting and analytics	10%	1.80	5.00	1.00	2.20	3.00	5.00	4.20
User interface	13%	1.00	1.00	3.00	1.00	3.00	1.00	5.00
Integrations	7%	5.00	5.00	1.00	1.00	3.00	3.00	3.00
Managed services	7%	3.00	5.00	1.00	5.00	3.00	5.00	3.00
Strategy	E00/	2.10	2.00	1.00	1 70	0.50	0.00	0.00
Product vision	50%	3.10	3.00	1.80	1.70	3.50	3.00	3.80
	15%	3.00	3.00	3.00	3.00	1.00	3.00	3.00
Execution roadmap	20%	1.00	3.00	1.00	3.00	5.00	1.00	3.00
Innovation Market engreesh	25%	5.00	3.00	3.00	1.00	3.00	3.00	3.00
Market approach	20%	3.00	5.00	1.00	1.00	3.00	3.00	5.00
Past performance	20%	3.00	1.00	1.00	1.00	5.00	5.00	5.00
Market presence	0%	2.00	3.50	3.00	2.00	5.00	2.50	4.00
Revenue	25%	1.00	3.00	3.00	1.00	5.00	3.00	3.00
Number of employees	25%	1.00	3.00	3.00	3.00	5.00	1.00	3.00
Number of customers	25%	1.00	3.00	5.00	1.00	5.00	1.00	5.00
Breadth of offering	25%	5.00	5.00	1.00	3.00	5.00	5.00	5.00

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



^{*}Indicates a nonparticipating vendor.

Vendor Offerings

Forrester included seven vendors in this assessment: Botify, Conductor, Moz, Searchmetrics, SEMrush, seoClarity, and Siteimprove (see Figure 3). We invited BrightEdge to participate in this Forrester Wave, but it chose not to participate, and we could not make enough estimates about its capabilities to include it in the assessment as a nonparticipating vendor.

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated				
Botify	Botify Analytics, Botify Intelligence, Botify Activation				
Conductor	Conductor Searchlight				
Moz	Moz Pro and Moz Local				
Searchmetrics	Searchmetrics Suite and Digital Strategies Group				
SEMrush	SEMrush				
seoClarity	seoClarity				
Siteimprove	Siteimprove SEO				

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

STRONG PERFORMERS

Conductor offers a well-rounded platform with the most robust services in the study.

Conductor boasts a strong solution because of its ability to support three functions in SEO: technical, content, and reporting. The New York-based company freed itself from the crumbling WeWork in late 2019 and used much of its former parent's investment to bolster its capabilities. Conductor's platform includes a content writing assistant to support adherence to SEO best practices, a partner marketplace to help teams automate SEO tasks, and a bevy of integrations to give marketers a holistic view of their organic search programs. Conductor aims to empower brands to transform marketing into a force for helping consumers rather than focusing on algorithms.



Conductor's SEO platform is well balanced and provides an extensive list of integrations across content marketing, web analytics, paid search, and social listening. Conductor solidly supports collaboration across the variety of stakeholders in the SEO process. And clients love its customerfirst culture. In fact, one client reference told us he shared an idea for how the platform could improve and it was turned into a capability in the platform within a year. Conductor's primary weakness is its platform UI, which is aesthetically pleasing but has numerous modules and lacks simplification for the vast amount of data and insights. One client reference told us, "I want its keyword research tool to be simpler. We use another vendor for that because we can see keywords by geo, device type, and other factors all in one view." We recommend Conductor for enterprise firms that have built the business case for SEO and have an SEO center of excellence.

> seoClarity is primed for brands with an in-house SEO expert. seoClarity, based in Chicago, brings to market a platform supported by training and professional services to help SEO leads identify, automate, and manage key tasks in the SEO process. The company brings automation to the SEO process in order to implement changes identified by the platform. seoClarity works with clients that have complex SEO challenges, are hungry to act on SEO opportunities, and want to improve their website experience.

seoClarity's strength is its ability to audit a client's site for technical and content issues and to audit a client's visibility in nontraditional search engines like Amazon, YouTube, and app stores. Clients appreciate its even balance of capabilities across technical and content SEO. Two client references told us that they saved time and reduced costs by using seoClarity as their primary SEO platform instead of a variety of point solutions, seoClarity's weaknesses lie in its roadmap, which lacks specificity, and in its platform's usability. As one client reference put it, "It needs someone dedicated to UX improving the platform. It is confusing, and it's hard to know what's clickable and what's not, so I just end up clicking on everything." Marketers that have already brought SEO in-house, have a seasoned SEO lead, and are looking for a platform to shore up their process will like seoClarity.

> Siteimprove presents the strongest strategy. A Challenger in our last Forrester Wave on SEO platforms, Siteimprove has gotten serious about providing a platform that fits the needs of enterprise firms. Siteimprove used to sport a web analytics solution for midmarket and enterprise firms but has recently focused its time and investment on its SEO offering. Based in Copenhagen, Denmark, the company has clients from a variety of industries including education, financial services, retail, and nonprofits. Siteimprove sees the future of its platform as a supporting technology to improve digital experiences and improve brand visibility and awareness in search engines.

Siteimprove's offering is noteworthy for its content SEO auditing and implementation capabilities paired with its unique focus on website accessibility. All three client references we spoke with for Siteimprove mentioned its strength in helping their websites improve accessibility for diverse visitors. We like its product roadmap for its focus on user experience and using search engines as brand channels. Siteimprove does have some shortcomings, though. The platform is weaker than competitors' on technical SEO auditing, opportunity forecasting, and local SEO. And its attempts at gamifying parts of the platform — like its activity plans where you can use "credits" to track more keywords or competitors — ends up being confusing. We recommend Siteimprove for companies that need an SEO platform to support their content marketing and website accessibility efforts.

> SEMrush remains steadfast in gauging a brand's online visibility. SEMrush provides one of the most widely used SEO tools in the market because of its large keyword database. The Bostonbased company partners with and supplies keyword data for many performance marketing agencies and SEO tools. SEMrush has built its unique position in the market through exclusive partnerships with keyword scraping firms and its large engineering team — three times the size of every other vendor's engineering team in this study - to maintain its database and technology. Its vision for its platform is to provide a fully comprehensive marketing platform to help brands understand their visibility across digital platforms like social media, organic search, paid search, and PR.

SEMrush is a must-have for keyword research and competitive intelligence. As one client reference said, "We have a big SEO toolbox — we use five vendors — but SEMrush is our dedicated keyword and market intelligence tool to understand how we stack up against competitors." But marketers should know that SEMrush would not disclose where and how it gets its keyword data. SEMrush is great for small and midsize businesses that need an insights-driven tool to fuel their content efforts across digital channels, but it isn't yet an enterprise-level SEO platform for all requirements. It lacks some workflow and process management capabilities, automation of technical fixes, and robust managed services. Enterprise marketers that are using a multipoint solution approach to SEO and need a rock-solid keyword and competitive research tool should consider SEMrush.

CONTENDERS

> Botify provides best-in-class technical SEO capabilities. A newcomer to the Forrester Wave, Botify's heritage and expertise is in the technical side of SEO — crawling, log file analysis, and site structure. The New York City-based company has rapidly grown over the past three years and evolved from a crawling point solution to a more comprehensive SEO platform. Its most unique feature is direct integration to make changes to a website's organic link straight from the Botify platform into Bing search results. Botify's vision is to automate the SEO process through its platform and to disrupt the market with a performance-based pricing model.

Botify is an established tool for marketers focused on technical site optimization. In fact, five client references from other vendors in this study mentioned they use Botify for technical SEO, specifically. The platform bests competitors in technical SEO auditing and implementation and innovation. But Botify isn't ready for brands seeking an all-in-one SEO platform. Its solution is missing workflow and process management capabilities to support various stakeholders and competitive intelligence data, and its ability to forecast keyword opportunities is weaker than others. The platform has a steep learning curve for stakeholders that aren't technically savvy. One client reference told us, "It goes after the nitty-gritty SEO person that gets into the weeds of its site. It isn't for generalists. If you don't have that hardcore technical SEO person, Botify is not for you." For now, Botify is indispensable for large e-commerce companies that need a technical platform to help clean up and optimize their sites.

> Searchmetrics focuses on content optimization. With headquarters in Berlin, Searchmetrics has the largest percentage of clients based outside of the US, and its client base heavily skews toward e-commerce companies. The platform centers on keyword research and content ideation and creation. Searchmetrics has gone through a substantial reevaluation of its platform and offering to fit the needs of its evolving customers, exhibited in its vision to simplify SEO for any digital marketer and to make search data integral to customer experience (CX) and product professional's decision-making process.

Searchmetrics' product vision is centered around simplification, but the platform has multiple modules that focus on content research, lack differentiation, and are difficult to use. And while the vendor would like to see CX or product professionals using the platform as a core input to decisions, it has no research to indicate this is a need. Searchmetrics trails competitors in technical SEO auditing, local SEO, and reporting and analytics, and it lacks comprehensive integrations with other marketing platforms. The platform does a good job using organic search data to help influence marketing decisions. One client reference told us, "They've been extremely helpful in uncovering areas for us to divest branded paid search terms and recognize cost savings." We also like it for its ability to assist content marketers with keyword research and content editing capabilities. E-commerce marketers, particularly those focused on Europe or partnering closely with CX and product, will find Searchmetrics to be a reliable partner for content optimization and strategic resources.

> Moz is woven into the fabric of the SEO industry. Moz is headquartered out of Seattle and has had a fundamental influence on the growth of SEO as a key marketing channel. The company is prominently known for its insightful blog posts and influential SEO thought leaders. Its platform is used by companies like Alaska Airlines, Zillow, and Trivago to perform site audits, track rankings, analyze backlinks, and research keywords and topics.

Moz's strengths are in the intuitive nature of its platform, which helps educate and guide marketers on necessary optimizations to their websites, and in its local SEO capabilities. And the company is also known for the community building it has done among clients and nonclients alike with events like MozCon. But Moz has struggled to gain significant traction in the enterprise market and has suffered some hiccups along the way. It falls short of enterprise marketer's needs for process management and collaboration support, correlating SEO activity to other channels, meaningful professional services, and global support. As one former client described, "I'm not sure what happened to Moz, but it sort of became obsolete in comparison, and it was only focused on the US." We recommend Moz to midsize national brands with a physical footprint that need a platform to support their content and SEO efforts. Moz declined to participate in the full Forrester Wave evaluation process.



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Evaluation Overview

We evaluated vendors against 28 criteria, which we grouped into three high-level categories:

- > Current offering. Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include workflow and process management, auditing, keyword research data, and reporting and analytics.
- > Strategy. Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, innovation, market approach, and past performance.
- Market presence. Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, number of employees, numbers of customers, and breadth of offering.



VENDOR INCLUSION CRITERIA

Forrester included seven vendors in the assessment: Botify, Conductor, Moz, Searchmetrics, SEMrush, seoClarity, and Siteimprove. Each of these vendors has:

- At least \$5 million in revenue from SEO software services in FY 2019.
- At least 60% of SEO software revenue that comes from marketers directly.
- > The capabilities to crawl a site for technical issues, conduct keyword research, track and report on organic web traffic, and provide workflow management.
- Significant presence in the SEO market as measured by Forrester clients inquiring about the vendor in the past 18 months and other providers citing the vendor as a top competitor.

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Supplemental Material

ONLINE RESOURCE

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

THE FORRESTER WAVE METHODOLOGY

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by July 1, 2020 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester WaveTM Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester WaveTM And The Forrester New WaveTM Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

INTEGRITY POLICY

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



Endnotes

- ¹ See the Forrester report "Top-Notch SEO Requires Seamless Coordination, Not Another Siloed Team."
- ² Jumpshot, a major source of keyword data, was shut down by Avast in January 2020 due to questionable data practices. Source: Ingrid Lunden, "Avast shuts down marketing analytics subsidiary Jumpshot amid controversy over selling user data," TechCrunch, January 30, 2020 (https://techcrunch.com/2020/01/30/avast-shuts-down-marketing-analytics-subsidiary-jumpshot-amid-controversy-over-selling-user-data/).
- ³ See the Forrester report "Ten SEO Best Practices That Your Site Can't Live Without."
- ⁴ We spoke with a client reference from another vendor in the study who had recently transitioned off of Moz.



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conductor

ABOUT CONDUCTOR

Conductor is the leading enterprise Organic Marketing platform with a mission to empower brands to transform their wisdom into marketing that helps people. Marketers use Conductor's software and services to drive high quality traffic to their site by creating and optimizing content so that it gets found online. Conductor also offers a suite of services and support, including site audits, site migrations, content strategy, and more. Conductor is rated #1 on TrustRadius and G2Crowd by enterprise marketers. Their forward-thinking customers include global and emerging enterprise brands such as Citibank, Visa, and Casper. For more information, visit Conductor.com.