

Market Guide for Digital Experience Monitoring

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Initiatives: [Infrastructure](#), [Operations and Cloud Management](#)

Digital experience monitoring tools continue growing as organizations struggle to support customer experience in the remote working world. I&O leaders should leverage DEM to identify technology performance issues and align application performance to support business objectives.

Overview

Key Findings

- Remote work remains at center stage currently as organizations struggle to balance worker demands for flexibility and organizations' desire for in-person interactions. Lack of visibility into endpoints, connectivity and application performance leaves them vulnerable to issues beyond their control.
- The pandemic pushed a lot of businesses to become digital-first as customers interacted with the brand on mobile and web. Real user monitoring and synthetic transaction monitoring have helped the business optimize the customer experience and improve digital business results.
- Interest in digital experience monitoring has expanded beyond just those responsible for the endpoint to include areas such as network path information. DEM technologies have improved core capabilities, particularly on single applications. However, rather than user experience, I&O leaders generally focus on technical performance and availability.

Recommendations

I&O leaders focused on infrastructure, operations and cloud management to monitor and improve end-user digital experience should:

- Gain visibility into remote worker experience by deploying DEM technologies that provide endpoint device, network and application performance information.

- Enable users to continually engage with websites and applications by leveraging DEM tools for insights into performance and user experiences. Synthetic and real user monitoring can enhance user journeys, but endpoint monitoring can improve employee productivity.
- Use DEM for monitoring SaaS and cloud applications, as there is no access to the infrastructure or applications supporting the service. Monitoring the user experience can ensure that these applications, and the dependent network services, are performing well and available at all times.
- When evaluating DEM tools, look beyond just the endpoint to identify other areas, such as application performance monitoring and network path analysis, where the technology can provide insights into remote users' experience.

Strategic Planning Assumption

By 2026, at least 60% of I&O leaders will use DEM to measure application, services and endpoint performance from the user's viewpoint, up from less than 20% in 2021.

Market Definition

Digital experience monitoring (DEM) technologies monitor the availability, performance and quality of an end user or digital agent experiences when using a device or application. This can include employees and customers though end customers (such as patrons of a retail website) are more often covered by application performance monitoring (APM) tools. DEM technologies seek to observe and model users' behavior as a continuous flow of interactions in the form of user journeys (see [Hype Cycle for Monitoring, Observability and Cloud Operations, 2021](#)).

Market Description

DEM provides visibility into the employee and customer experience as they interact with applications and devices. These are becoming increasingly cloud-based, accessed on platforms, such as infrastructure as a service (IaaS) and software as a service (SaaS), but visibility into on-premises components is still required. DEM's purview spans endpoint devices, core infrastructure, applications and business processes to enable a comprehensive view of the end-user experience, and translate them into business outcomes.

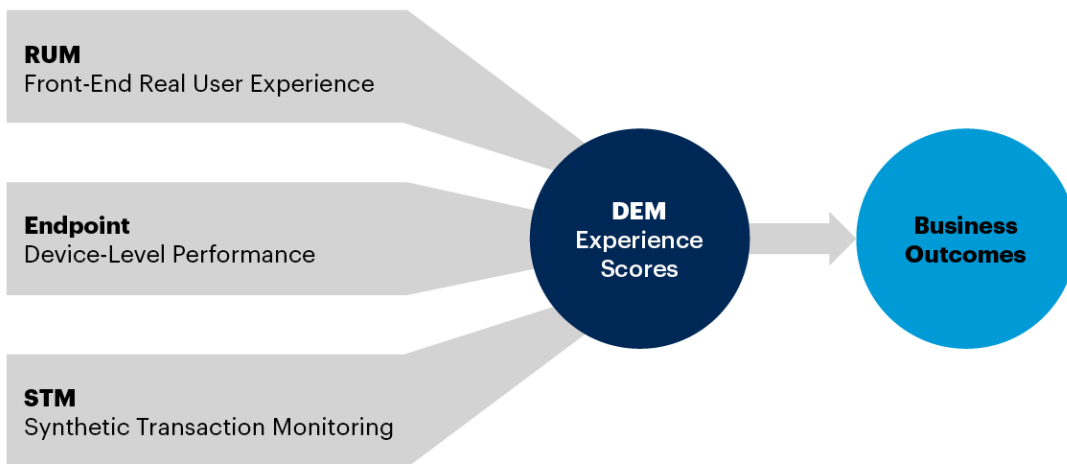
To maximize impact digital experience, DEM should include these core capabilities:

- Real user monitoring (RUM), which measures user experience from the perspective of the application (e.g., at a web application level)
- Endpoint monitoring (EP) technologies that provide visibility into end-user devices
- Synthetic transaction monitoring (STM) technologies that have been around for decades and help organizations proactively test services, such as SaaS

These capabilities contribute to the ultimate goal of answering questions related to the business (see Figure 1).

Figure 1: Digital Experience Monitoring Components

Digital Experience Monitoring Components



Source: Gartner
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Gartner

By integrating these technologies, DEM creates a comprehensive view and analysis of the employee and customer experience and, ultimately, the impact on the organization's operational efficiency and then business. This insight becomes critical as more applications and workloads move to the cloud, and I&O leaders lose visibility and control of the applications and services' infrastructure components. During the cloud migration, user experience is compared before and after migration, as it is important that the user experience remains the same or gets better than when the application was hosted on-premises.

DEM solutions shift the focus from technical availability and performance to helping organizations optimize and improve digital business outcomes by addressing three key topics (see Figure 2):

- **What they monitor.** The availability, performance and quality of applications and all of its components and endpoints that may impact the end-user experience.
- **Who they monitor.** Anyone and everything (including external customers, partners, internal employees and digital agents) that interacts with a service.
- **Why they monitor.** To identify user's experience and connect technology with business KPIs, allowing improved achievement of desired business outcomes. With continued and increasing business processes becoming digitized, monitoring how it impacts the quality of the experience and the overall business process will become an increasingly important focus area for organizations. By improving customer experience, DEM impacts what business outcomes organizations have – from revenue generation, conversion rates, customer satisfaction, brand reputation to the ability to design innovative products and services, managing relationships with partners or attracting top talent.

Improving and ensuring employee productivity is another important objective of DEM. For organizations implementing hybrid and work-from-anywhere models, measuring the employee experience has become critical to improving productivity and engagement. Employees are looking for flexibility in connecting from multiple endpoints. Agents installed on physical and virtual endpoints and SDK-based integration with apps provide much more actionable telemetry.

Market Direction

The pandemic and societal disruptions in 2020 and 2021 have highlighted the need for organizations to take more flexible approaches to engaging their users. Businesses are constantly trying to improve a fast and seamless user experience to the customers and employees. Due to the uncertainty and disruption, the user needs and situations have quickly changed. Investments in DEM technologies have gone up significantly over the last two years as they impact the business value. They have also opened up opportunities for businesses to quantify user experiences digitally.

Increasing use of externally hosted and SaaS applications and endpoints operating outside of corporate offices and networks results in IT's responsibility for services over which they have less control. Traditional monitoring technologies, such as APM or NPM, can fill some needs but leave visibility gaps, such as internet routing, DNS, CDN and edge infrastructure. DEM measures performance from the user's point of view and can uncover the impact that degraded performance has on productivity, revenue generation, brand reputation and customer loyalty.

DEM continues its growth and influence on the overall ITOM market, with an estimated size of between \$1,157 million and \$1,270 million in 2021 and a compounded annual growth rate (CAGR) of around 15% between 2020 and 2025 (see [Market Opportunity Map: IT Operations Management, Worldwide](#)). Adoption and direction are influenced by areas:

- Digital business transformation
- Improved customer experience
- Increase employee productivity and engagement

Privacy continues to be a concern for vendors, clients and regulators around digital experience monitoring – particularly in Europe. Real user monitoring and endpoint monitoring have access to sensitive personal information; tools will need to increase their ability to mask, anonymize and aggregate such data. SaaS-based solutions will need to improve understanding of where client data is held, and will likely lead to increased distributed points of presence for these vendors.

Figure 2: Evolution of Digital Experience Monitoring Tools

Evolution of Digital Experience Monitoring Tools



Source: Gartner
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Market Analysis

Digital experience monitoring technologies are enjoying strong demand accelerated by remote work, as well as digital workplace and digital transformation initiatives. In particular, organizations’ demand for endpoint technologies has surged in 2021 (see [Employee Enablement Is Key to Digital Workplace Services Leaders’ Survival](#) and [Deliver Peak Digital Employee Experience Excellence in 4 Steps](#)).

This is not to say that synthetic monitoring technologies are not in demand, as they also play a key role (e.g., in helping organizations detect performance problems with SaaS applications).

The move toward cloud and mobile-based applications continues to challenge how I&O monitors applications and user experience. Gartner sees the following additional key drivers that should drive the focus of I&O teams toward DEM:

- Historically, DEM has focused on externally facing, revenue-generating applications, but the number of people working remotely due to the pandemic has put immense pressure on IT to improve the digital employee experience (DEX). Measuring DEX should not be the end goal, but rather a way to continuously improve how technology performance and experience supports an organization’s ability to achieve its desired business outcomes. DEM technologies offer a unique way to help both employee and customer experience.

- SaaS providers' monitoring of their own services fails to provide granular visibility of performance or experience, such as from the user's perspective. This leaves customers in the dark and puts the customer organization's business performance at risk. They are often late in acknowledging an incident that has already caused user impact. As a result, enterprises must leverage a DEM tool with STM and RUM capabilities, which can offer proactive insights about SaaS applications' performance from on-premises or diverse cloud locations.

While today's efforts at end-user experience monitoring are in the early stages, end-user experience monitoring in most enterprises is carried out on an application-by-application basis – often with different data ingestion technologies used for different applications. There is little effort to triangulate observation and understanding across multiple data ingestion technologies and no cross-channel measurement of user experience. To improve this, I&O leaders must initiate projects where – using the end-user experience monitoring technologies already in place – attempts are made to identify individual end users and monitor their experience as they access multiple applications, services and locations.

An approach must be developed that will “add up” the measurements from multiple application and service interactions to provide a user- or agent-centered portrait of digital business quality. For example, a user may have consistent, positive response times when accessing a commercial loan system. However, when accessing the retail banking application, the user's response times may experience a drop from the “satisfied” range calculated by an Apdex algorithm to the category of “frustrated.” Apdex is an open standard for measuring the user experience. The user may also have interacted with a digital agent when accessing the service desk. This interaction may not have gone well, leaving the user dissatisfied. An AIOps tool (see [Market Guide for AIOps Platforms](#)) can ingest data from a wide variety of sources, calculate a composite view of the users' current level of satisfaction and ideally provide prescriptive advice on how to improve the situation.

Often depending on the vendor's primary market focus, packaging and pricing of DEM varies significantly. Whereas STM is generally priced by the number of synthetic checks – normally in bundles of millions of checks – RUM is priced by the number of applications or user sessions being monitored, although sometimes both are priced similarly. Endpoint monitoring, on the other hand, is typically priced by the number of devices being monitored – regardless of the frequency or the amount of data being produced and analyzed.

Given that DEM technologies are increasingly deployed together, some providers offer DEM units that give customers flexibility in product usage, based on their specific needs and use cases. Additionally, there are new pricing models that bundle many of the monitoring technologies, and are offered as a seat license.

DEM technologies alone cannot analyze full business outcomes and impact – but they help organizations identify specific services or user journeys that you should focus on. How, then, do you get business outcomes from DEM? DEM technologies provide deep visibility into end-user experience by linking technology with business outcomes. Consider the following examples:

- **Remote worker experience:** DEM technologies can show how users experience specific applications through endpoint monitoring (see [How to Monitor and Troubleshoot Remote Workers' Application Performance](#)). This enables I&O to see detailed performance data on that endpoint and, by extension, the digital employee experience. Data, such as system performance (including CPU, memory, disk and network metrics), along with specific application performance information, not only provides a detailed view of what users are experiencing, but also facilitates troubleshooting by giving the service desk visibility into what the employee experiences. By leveraging the endpoint performance data, it may be possible to understand potential stability and performance issues, and enable rapid or automated resolution.
- **Employee productivity:** Increased remote work or hybrid work has increased the need to ensure that employees can be productive and satisfied with their technology's performance. The influence of employee experience and productivity can provide evidence into what inhibits employee productivity, so they can be analyzed and resolved. It can be seen through organizations' efforts to build the digital workplace. However, the digital workplace is predicated on workforce digital dexterity – the ambition and ability to apply technology to improve business outcomes. Robust digital dexterity delivers an engaging, intuitive work environment akin to today's customer experience. Conversely, poor workforce digital dexterity will also have a profound and negative impact on customer experience

- **Proactive network path analysis.** DEM technologies can be leveraged to track the path that data takes from endpoints connected to local networks, remote office connections, VPN, home office or cellular connections to on-premises and cloud-based services. By leveraging STM to simulate specific users' transactions and gain full path insight into the performance of each interaction, I&O and other business leaders can understand both what is occurring at each step throughout a service, as well as the impact of changes through continuous, real-time scripted interactions. Leveraging STM data allows I&O teams to identify the specific area in a service that may experience problems, as well as identify time- or location-based issues that occur – allowing for improved uptime and an overall better user experience.
- **Omnichannel operations.** ¹ DEM technologies allow business and product owners deep visibility into exactly how users interact with a brand through the use of RUM technologies – ideally across platforms, mobile and web. RUM provides not just an overview of how the user interacted with a service, but also everything from what links were clicked, to how long someone hovered their mouse over a specific image, to the ability to replay the interaction after the fact. These abilities allow companies to understand why people are or are not buying products, and how the website design impacts user choices. DEM can pull back metrics, such as conversion and bounce rates, time spent on the site, the number of clicks to an order, and the impact these metrics and others have on a digital marketing campaign. For example, RUM can track how users navigate through a website before placing an order. The analysis may uncover that certain screen sequences result in more orders. This enables the web designer to optimize the website and campaign to lead users to the path that produces more orders.

I&O leaders often struggle with quantifying user experience, often falling back on technology metrics (e.g., CPU and memory utilization). Instead, they should use business KPIs, such as customer satisfaction, quality of experience and employee engagement (see [Deliver Peak Digital Employee Experience Excellence in 4 Steps](#)). While metrics are critical to tracking system performance and doing root cause analysis, a KPI tells I&O leaders whether they support business objectives.

Table 1 highlights the most common use cases for DEM. Naturally, there are use cases that require a combination of technologies and approaches and, while some vendors have multiple DEM capabilities, other cases feature a use case that would require the deployment of multivendor solutions.

Table 1: DEM Technologies and Most Common Use Cases

(Enlarged table in Appendix)

DEM Technology	Use Cases
Real User Monitoring	<ul style="list-style-type: none"> ■ Monitoring performance and quality of user experience for external-facing applications (browser and native mobile app) ■ Service-level agreement compliance ■ Root cause analysis of front-end application performance problems ■ User experience analysis through session replay ■ Omnichannel user journey and customer experience analysis ■ Business outcome analysis
Endpoint Monitoring	<ul style="list-style-type: none"> ■ Application performance monitoring ■ Endpoint performance and configuration monitoring ■ Digital employee experience monitoring ■ Network connectivity monitoring ■ Application usage and (technology adoption and employee engagement) ■ Root cause analysis of technology performance issues
Synthetic Transaction Monitoring	<ul style="list-style-type: none"> ■ Monitoring software as a service (SaaS) applications by simulating multiple step transactions and monitoring the performance at each step. ■ Identifying problems across endpoint, local network, internet, application servers ■ Testing from remote locations such as last-mile, cloud providers, or Tier 1 providers ■ Monitoring quality of unified communications and collaboration technologies such as Cisco Webex, Microsoft Teams, Slack and Zoom ■ Benchmarking website availability and performance ■ API monitoring ■ Monitoring wireless access points ■ Monitoring network and internet user traffic ■ Testing performance in preproduction

Source: Gartner (March 2022)

The Relationship Between DEM and Other Markets

Digital experience monitoring is adjacent or overlaps with two other markets that Gartner researches.

DEM vs. APM

APM focuses on performance problems from a technology point of view, while DEM focuses on application problems from a user's perspective. DEM also includes device-level performance. Organizations often use the DEM capabilities of their chosen APM solutions rather than evaluate and procure an additional product. APM-based DEM primarily includes RUM and STM – to date, it is unusual that endpoint monitoring is available as part of APM. When cost and logistics allow, Gartner recommends that organizations make use of their existing APM-based RUM and STM rather than purchase additional DEM products and services. This leverages existing skills and broadens the footprint of what are often fairly costly software tools. Instances where this is likely not possible include:

- Endpoint-based use cases such as DEX
- Applications of DEM outside of health and performance, such as marketing

DEM vs. DEX

DEM focuses more broadly on digital experience for any end user (customers or employees). DEX has evolved from DEM and focuses on the digital experience of employees (no customer/consumer perspective). In addition to performance monitoring, it also incorporates organizational context data (location, roles, employee type, etc.) and gathers contextual employee sentiment (about the use and performance of technology). This data is used by analytics/ML engines to produce actionable insights. DEX tools can take action in the form of a script or change to the endpoint, or a communication/nudge to the employee if the issue is related to their actions rather than a technology glitch.

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

There are many providers of DEM, each offering capabilities that often depend on its core or primary focus in the market (see Tables 2, 3 and 4). Some may offer point solutions focused on synthetic transactions, and others may offer DEM as part of an APM suite. We grouped the vendors into three categories – real user monitoring, endpoint monitoring and synthetic transaction monitoring. Vendors may appear in multiple categories depending on their product offering.

Table 2: Representative Vendors With Real User Monitoring Technologies

(Enlarged table in Appendix)

Vendor	Product
Aternity	Aternity Digital Experience Management platform.
Broadcom	DX App Experience Analytics
Catchpoint	Real User Monitoring (RUM)
Cisco (AppDynamics)	Browser Real User Monitoring (Browser RUM). Mobile Real User Monitoring (Mobile RUM)
Datadog	Real User Monitoring (RUM)
Dynatrace	Real User Monitoring (RUM)
eG Innovations	Real User Monitoring
ENow Software	Office 365 End User Experience Monitoring
IBM	Cloud Application Performance Management
Lakeside Software	SysTrack
ManageEngine	Applications Manager's Real User Monitoring (RUM)
New Relic	New Relic One
SolarWinds	Pingdom

Source: Gartner (March 2022)

Table 3: DEM Vendors With Endpoint Monitoring Technologies

(Enlarged table in Appendix)

Vendor	Product
1E	1E Tachyon
7SIGNAL	Mobile Eye
Aternity	Aternity Digital Experience Management Platform
Broadcom	AppNeta Performance Manager
Catchpoint	Endpoint Monitoring
Cisco (ThousandEyes)	End User Monitoring
Citrix	Unified Endpoint Management (UEM)
ControllUp	Edge DX, Real-Time DX, Remote DX
Fortinet	FortiMonitor
HCL Technologies	DRYICE AEX
Hive	Hive Insights
Ivanti	Ivanti Neurons for Healing
Lakeside Software	SysTrack
Liquidware	Stratusphere UX
Microsoft	Endpoint Analytics
NetMotion	Digital Experience Monitoring
Nextthink	Nextthink Experience
Palo Alto Networks	Autonomous DEM
Tanium	Tanium Performance
VMware	Workspace ONE Intelligence Digital Employee Experience Management (DEEM)
Zscaler	Zscaler Digital Experience (ZDX)

Source: Gartner (March 2022)

Table 4: DEM Vendors With Synthetic Transaction Monitoring Technologies

(Enlarged table in Appendix)

Vendor	Product
Apica	Apica Synthetic
Aternity	Aternity Digital Experience Management Platform
Broadcom	Synthetic Monitoring
Catchpoint	Synthetic Monitoring
Cisco (AppDynamics) Cisco (ThousandEyes)	Browser Synthetic Monitoring Browser Synthetics
ControlUp	ControlUp Scoutbees
Datadog	Synthetic Monitoring
Dynatrace	Synthetic Monitoring
eG Innovations	Synthetic Monitoring
ENow Software	Office 365 End User Experience Monitoring, Office 365 Monitoring and Reporting
Fortinet	FortiMonitor
ITRS Group	Synthetic Monitoring
Kentik	Synthetic Monitoring
Lakeside Software	SysTrack
ManageEngine	Site24x7
Martello Technologies	Martello Vantage DX
New Relic	New Relic One
SolarWinds	Pingdom, Web Performance Monitor
Zscaler	Zscaler Digital Experience (ZDX)

Source: Gartner (March 2022)

Market Recommendations

Infrastructure and operations leaders should deploy DEM technologies to create holistic views of a user's digital experience using a combination of data sources:

- **Real user monitoring:** JavaScript that is automatically injected into web applications to collect data, such as application response time, latency, errors, geolocation, browser and versions. Alternatively, plug-ins can be deployed when HTML is not accessible (e.g., in the case of SaaS applications). Session recording and replay shows what the user experienced during an application session, which the IT monitoring teams can correlate with other application performance metrics for root cause analysis.
- **Endpoints:** Agent-based monitoring of the device and application performance from the user's perspective to help identify problems that impact endpoint performance and user experience.
- **Synthetic transaction monitoring (STM):** Simulating application transactions to simulate user interactions with applications leveraging RUM data to create the most natural and realistic conditions.

Organizations should also complement data analysis from the above sources with social media analytics, NPS and ITSM data to correlate user-derived tickets to system performance and user experience – as well as the analysis of API performance as applications interact with each other.

Acronym Key and Glossary Terms

APDEX	Application Performance Index
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Evidence

The global pandemic increased demand from organizations for endpoint monitoring tools. These technologies are instrumental in helping I&O leaders enable the massive shift in remote working. We have seen a steady rise in demand for information about DEM topics, including STM, RUM, endpoint monitoring, and how such tools and technologies form part of APM and other monitoring suites.

Gartner's 3Q21 update forecast for worldwide performance analysis software (APM, NPMD and AIOps/ITIM/other monitoring tools) spend in 2021 is \$14.3 billion, representing a conservative estimated increase of 7.5% in constant currency from 2020 as organizations undertake increased remote work initiatives and start coming out under the shadow of the COVID-19 pandemic. While organizations' IT budgets come under significant pressure – and at the same time must continue to support remote work and digital transformation initiatives – monitoring tools are also being impacted by the challenging macroeconomic environment. Having said this, we believe that spending on DEM technologies will continue through 2024 at an ever increasing rate.

¹ Gartner distinguishes “omnichannel retail operations”-focused DEM tools from tools such as Adobe (Adobe Analytics) and Google (Google Analytics) through the fact that Adobe and Google tools are focused on providing data useful for improving the marketing of products – whereas DEM tools provide data focused on technical analysis of site and end-user performance. While there may be overlap between the different tool types and data collected, the way the data is presented and organized is different due to the different use cases involved.

Note 1 Representative Vendor Selection

The vendors listed in this report are representative of DEM providers that have one or several capabilities, as outlined in the Market Description section of the report. This is not meant to be a complete list of providers in this space.

Note 2 DEM Technologies

Organizations that implement DEM tools will experience more successful digital transformation projects as a result of achieving better application performance, user experience and business outcomes. I&O leaders must consider nonhuman digital agents, such as bots that do purchasing, issue trades, respond to user inquiries in a customer service role and more, in their analysis of interactions among customers, suppliers, partners and observers that may exhibit different behaviors and operate on different time scales.

Document Revision History

[Market Guide for Digital Experience Monitoring - 25 August 2020](#)

[Market Guide for Digital Experience Monitoring - 5 September 2019](#)

Recommended by the Authors

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

[Magic Quadrant for Application Performance Monitoring](#)

[Critical Capabilities for Application Performance Monitoring](#)

[Getting Value From Employee Productivity Monitoring Technologies for Remote and Office-Based Workers](#)

[Market Guide for AIOps Platforms](#)

[Deliver Peak Digital Employee Experience Excellence in 4 Steps](#)

[Innovation Insight for the Digital Employee Experience](#)

[How to Manage Customer Experience Metrics](#)

[Magic Quadrant for Unified Endpoint Management Tools](#)

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Fortinet	FortiMonitor
HCL Technologies	DRYICE AEX
Hive	Hive Insights
Ivanti	Ivanti Neurons for Healing
Lakeside Software	SysTrack
Liquidware	Stratusphere UX
Microsoft	Endpoint Analytics

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