Magic Quadrant for Digital Experience Platforms

Analyst(s):

Jim Murphy, Gene Phifer, Gavin Tay, Mike Lowndes

Summary

Organizations are looking to use DXPs as they move from web-centric to more pervasive, multichannel digital experiences. This Magic Quadrant will help those responsible for a range of customer-, employee- and partner-facing initiatives find the most suitable vendor for their needs.

Market Definition/Description

Gartner defines a digital experience platform (DXP) as an integrated set of technologies, based on a common platform, that provides a broad range of audiences with consistent, secure and personalized access to information and applications across many digital touchpoints. Organizations use DXPs to build, deploy and continually improve websites, portals, mobile and other digital experiences.

DXPs manage the presentation layer based on the role, security privileges and preferences of an individual. They combine and coordinate applications, including content management, search and navigation, personalization, integration and aggregation, collaboration, workflow, analytics, mobile and multichannel support, in order to:

- Provide end users, including customers, employees, partners, citizens, students and other audiences, with unified, timely and continuous access to relevant information, interactions and knowledge.
- Aggregate and coordinate disparate local and remote content, applications and web services into cohesive experiences.
- Facilitate and apply user experience design practices, such as persona modeling, journey mapping, responsive layout and data-driven design, to improve individuals' digital experiences.

Many DXP offerings derive from portal platforms, web content management (WCM) systems, or enterprise content and collaboration systems as they evolve and converge to support individualized digital experiences.

DXPs should not be confused with digital commerce platforms. DXPs are designed to serve a broader range of use cases than digital commerce. Conversely, features and functions specific to digital commerce are not required for a product to qualify as a DXP platform. Still, several DXP providers offer native or integrated commerce functionality, which adds significant breadth to their offerings. Digital commerce vendors whose products are not sold for more than the digital commerce use case are excluded from this Magic Quadrant. For more on how digital commerce

platforms can work with DXPs, see "The Three Approaches to Digital Commerce Platform Architecture and How to Choose Among Them."

Functional Components of Digital Experience Platforms

DXPs include the following capabilities as a set of rationalized, integrated services, where:

- **Core/native:** Indicates an essential capability or function of the DXP. It must be included in the core offering and owned and supported by the primary DXP vendor.
- **Core/non-native:** Indicates an essential capability or function of the DXP. It may be provided by the primary vendor or by a separate vendor or open-source organization.
- **Elective/differentiating:** Indicates a capability or function that extends or enhances the DXP's effectiveness or equips it to serve vertical requirements and specific use cases.

1. Audience experience: DXPs allow end users, such as employees, customers and partners, to interact with the following capabilities:

- **Content interaction:**
  - **Core/native:** Audiences gain personalized access to relevant information, services and business applications.
  - **Core/non-native:** Audiences can rate, recommend, create, share and tag content.
  - **Elective/differentiating:** Audiences can create content-centric applications supporting form-based processes and approval workflows.
- **Search, navigation and discovery:**
  - **Core/native:** Audiences can search and discover content and applications available through the DXP. They can navigate experiences with dynamic menus, filtering and faceted navigation.
  - **Core/non-native:** Audiences can categorize or classify content.
  - **Elective/differentiating:** Audiences can access aggregated and sorted content inside or outside the DXP environment. Search is federated, so that a single query can collate results from multiple search/query engines. Search can sort and order results based on personalization rules and contextual variables.
- **Collaboration and social computing:**
  - **Core/native:** Not required.
  - **Core/non-native:** Publish to social media channels. Aggregate, personalize and present information derived from social media channels.
  - **Elective/differentiating:**
    - Document collaboration; shared calendars; team site or team room functionality; project management; real-time collaboration using, for example, messaging and conferencing.
    - DXPs can include social profiles, activity streams and social graphs, as well as applications to support wikis, blogs, forums, ratings and reviews, and curation of external social media.
    - Knowledge management, expertise location, e-learning.
- **End-user customization:**
  - **Core/native:** Not required.
  - **Core/non-native:** Audiences can manage their own experiences with "MyPortal" or "MySite" capability. Audiences can manage subscriptions and notifications, save searches and arrange personal views.
  - **Elective/differentiating:** Audiences, including end users, can compose and share their own apps and components.

2. DXP management: DXPs provide IT and business people with the following capabilities to create, administer and improve the digital experience:

- **Content management:**
  - **Core/native:** Ability to create, organize and publish a variety of content assets (text, images and rich media) in the context of the digital experience; content creation, such as templating, workflow and change management.
  - **Core/non-native:** WCM, defined as the process of controlling content to be consumed over digital channels through the use of management tools based on a core repository; WCM repositories that organize and enhance content with metadata; library services, such as check-in/check-out, version control and security.
  - **Elective/differentiating:** Digital asset management, document management, imaging and optical character recognition (OCR), electronic/interactive forms, records management and product information management (PIM); microsite or landing page creation and management.
- **Integration and aggregation:**
  - **Core/native:**
    - Aggregate content, applications and services through web services and APIs.
    - Deliver/expose content and APIs to other websites, portals and mobile apps.
    - Integrate with third-party resources, such as CRM systems, HR systems and directory services, to manage permissions and drive personalization.
    - Interoperate with external, third-party content management systems, business applications and social networks.
  - **Core/non-native:**
    - Offer prebuilt connectors for common content management systems, business applications and social networks.
    - Aggregate content and apps without necessitating migration or loading data into a single data repository.
  - **Elective/differentiating:**
    - Enterprise service bus or integration broker to consume application content and services from back-end systems.
    - API management platform capability.
- **Personalization:** A process that creates a relevant, individualized interaction between two parties designed to enhance the experience of the recipient. It uses insight based on the recipient's personal data, as well as behavioral data about the actions of similar individuals, to deliver an experience that meets specific needs and preferences.
  - **Core/native:**
    - Direct relevant content and information to individuals, groups and roles, based on the attributes of known, logged-in users.
    - Adapt the content and behavior of page components, pages or page groups, based on the attributes of known, logged-in users.
  - **Core/non-native:**
    - Direct relevant content and information to anonymous users, based on context signals such as location, behavior and history.
    - Adapt the content and behavior of page components, pages or page groups for anonymous users, based on context signals.
  - **Elective/differentiating:**
    - Automate personalization rules with machine-learning-based algorithms.
    - Targeting, based on collaborative filtering, peer-set buying behavior, marketing analytics and similar.

- **Analytics and optimization:** Monitor the use and measure the success of digital experience initiatives.
    - **Core/native:** Integration and contextualization of web analytics provided by third parties.
    - **Core/non-native:** Performance monitoring, usage analytics and other basic web analytics.
    - **Elective/differentiating:** Path analysis, sequence analysis, social listening, sentiment analysis, marketing performance analysis, BI tool integration, split A/B testing, multivariate testing and automatic site modification based on analytics.
- **Security administration:**
    - **Core/native:** Ability to manage access rights and privileges by individual, group, role or segment; user/profile provisioning.
    - **Core/non-native:** Single sign-on (one authentication event and automatic subsequent authentication to access all DXP resources and back-end applications).
    - **Elective/differentiating:** Full identity and access management (IAM); self-service provisioning; document-level access control; ability to use social-networking ID; federated single sign-on (SSO) — standards-based SSO to applications in another security domain; machine-to-machine authentication.
- **Workflow/business process management:**
    - **Core/native:** Supports content publishing and approval workflows.
    - **Core/non-native:** Supports serial, parallel and nested workflows; supports forms and form-based workflows.
    - **Elective/differentiating:** Integrates with external BPM systems.
- **User experience management:**
    - **Core/native:** None.
    - **Core/non-native:** Provides page and content element layout capabilities; provides business users with the ability to change page and content layouts.
    - **Elective/differentiating:** Supports design methodologies by incorporating capabilities such as persona modeling and journey mapping.
- **Digital commerce:**
    - **Core/native:** None.
    - **Core/non-native:** Integrates with commerce engines and PIM systems.
    - **Elective/differentiating:** Transactions, catalog management or PIM, merchandising and promotion, shopping basket, credit validation, shipping and fulfilment connectors.
- **Development:**
    - **Core/native:**
        - Compositing: Ability to assemble and integrate application components and services for a variety of purposes and audiences.
        - Component model (using web components, portlets, widgets or similar) that serves as a building block for assembling composite applications.
    - **Core/non-native:**
        - Integrated development environment.
        - Server-side scripting.
        - Client-side scripting.
        - Component store or library.
    - **Elective/differentiating:**
        - Private or public "app store" or similar for components, apps, plug-ins, connectors, templates or themes.
        - An internal or external "app store" offering vendor-, partner- or customer-provided sanctioned components, apps, plug-ins, templates or themes.

3. Platform/architecture: The technical foundation enabling the DXP:

- **Presentation:**
  - **Core/native:**
    - Supports UI technologies that deliver rich experiences, including HTML5, and related technologies (such as Cascading Style Sheets 3 [CSS3] and JavaScript).
    - A page framework, container and component model, using web components, "portlets," "widgets" or a similar construct.
    - Supports responsive web design.
  - **Core/non-native:**
    - Supports progressive web application development.
    - Supports "headless" deployment employing third-party or open presentation layers (see Note 1).
  - **Elective/differentiating:**
    - Supports progressive web apps (PWA).
    - Allows pass-through/proxying of rich content from third-party systems.
- **Customer/user data management:**
  - **Core/native:** Incorporates a user profile as a single trusted view of the "customer" or individual user.
  - **Core/non-native:** Collects, unifies and synchronizes customer data from digital and analog channels to enable modeling and drive the customer experience.
  - **Elective/differentiating:** Customer data hub; master data management; support for data management platforms.
- **Cloud enablement:**
  - **Core/native:** Support for deployment via third-party infrastructure-as-a-service providers.
  - **Core/non-native:** None.
  - **Elective/differentiating:** DXP as a service: Can run in a cloud-based environment at a platform level with multitenancy.
- **Mobility:**
  - **Core/native:** Render information, services and applications for consumption in smartphones and tablets.
  - **Core/non-native:** Notification support, offline support, mobile software development kit (SDK) or equivalent.
  - **Elective/differentiating:** Mobile SDK, mobile application development platform, mobile device management, voice interaction.
- **Globalization/localization/multilanguage support:**
  - **Core/native:** Supports multiple character sets.
  - **Core/non-native:** Supports translation and localization workflows.
  - **Elective/differentiating:** Provides automated content translation.

DXP Use Cases

DXPs are designed to support multifaceted, multichannel, multisite initiatives, rather than single, discrete websites. They are also designed to provide unified, secure and personalized access to various disparate systems, rather than serving as the front end of a single system focused on a specific process or use case.

Common use cases for DXPs include:

- Business-to-consumer (B2C) websites and portals to support corporate information, marketing, commerce, customer service initiatives.
- Business-to-business (B2B) websites, portals and extranets to support marketing, commerce, customer experience, and partner and supplier relationship management initiatives.
- Business-to-employee (B2E) intranets and portals to support corporate communications, employee service, knowledge management and collaboration.
- Websites and portals for government, public sector and educational organizations.
- Front ends for digital business platforms, including internal, private and public, as defined in "Three Styles of Digital Business Platforms."

Magic Quadrant

Figure 1. Magic Quadrant for Digital Experience Platforms
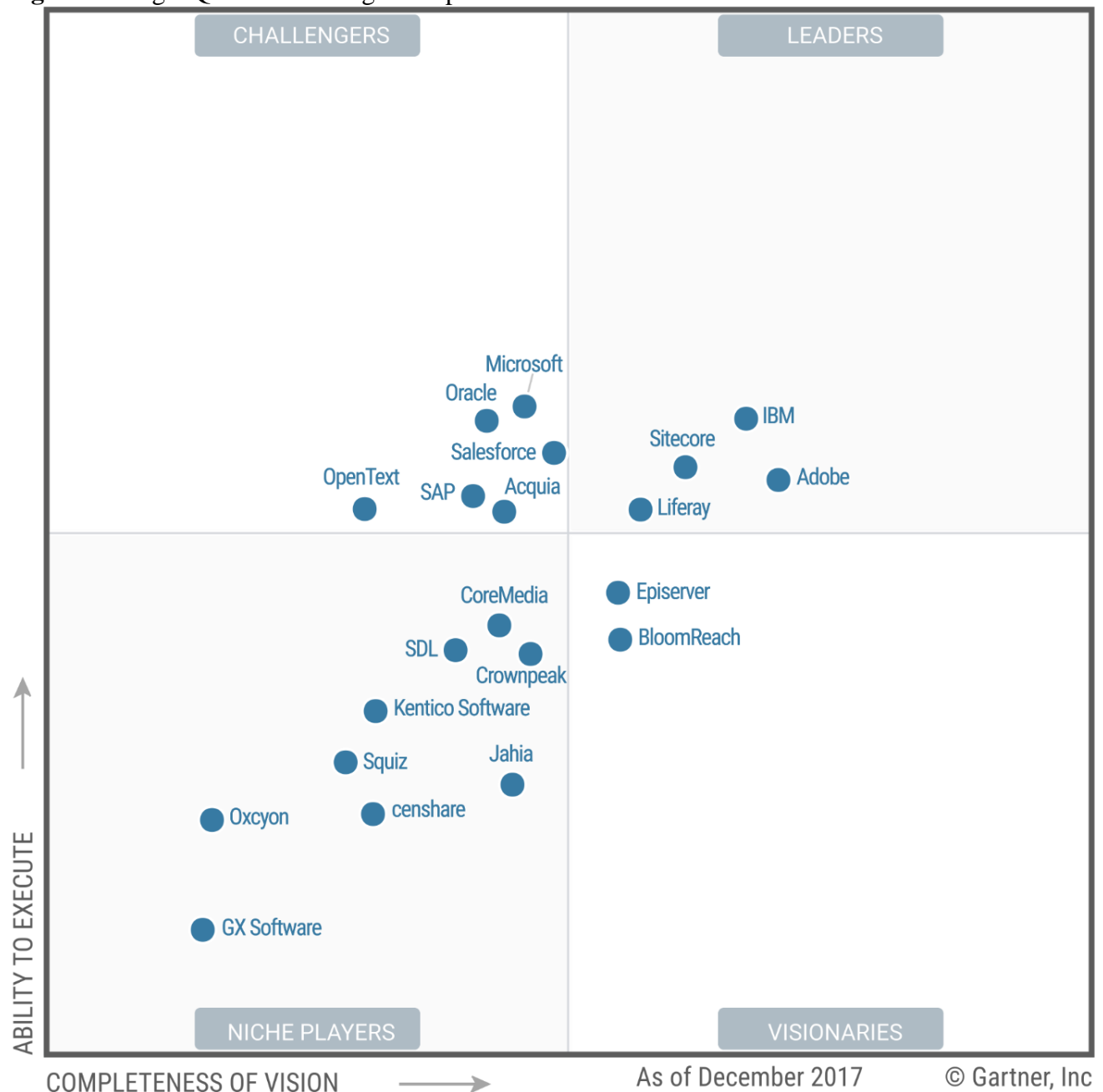
Source: Gartner (January 2018)

Vendor Strengths and Cautions

Acquia

[Acquia](#) , which is based in Boston, Massachusetts, U.S., and has offices in Europe, India and Australia, provides software and services based on the popular open-source platform Drupal. Acquia provides managed services and cloud hosting via the Acquia Cloud platform, which offers extended capabilities such as Acquia Lift, focused on personalization and analytics, and Acquia Lightning, a lightweight development framework including packaged accelerators. Drupal is used widely for public websites, extranet portals, intranets and headless content management. Early customers were largely in the government and education sectors, but Acquia has since established itself in many industries, including media and entertainment, consumer products and retail.

Strengths

- **Scalability:** Acquia is a proven expert at scaling Drupal for use in enterprise-class scenarios by creating a cloud platform as a service (PaaS) around it.
- **Versatility:** Drupal's use in a wide range of use cases around the world provides Acquia with a broad base of customers for its extended enterprise services.
- **Partner momentum:** Acquia has a large and growing set of partners globally, and is focusing their combined efforts on experience management and personalization as a means of differentiation.

Cautions

- **Application integration:** The integration and aggregation capabilities required by some DXP use cases are less developed than in offerings from some other vendors. Because Drupal was designed primarily as a WCM system, it tends to treat its own content as the "source of the truth," rather than serve as a unified front end for many content, data and application sources.
- **Complexity:** Some customers report a steep learning curve and a level of technical complexity that requires a thorough commitment of resources and can slow their speed to market.
- **Digital commerce integration:** Limited commerce integration may complicate Acquia deployments for some use cases. Acquia has connectors for Magento (an open-source commerce platform), SAP Hybris and the Drupal Commerce module. Connectors for other commerce platforms are still being developed and therefore unproven.

Adobe

[Adobe](#) , which is based in San Jose, California, U.S., delivers DXP functionality through a combination of the Adobe Experience Cloud, Adobe Creative Cloud, Adobe Document Cloud and Adobe Cloud Platform, each of which encompasses many products and services. More specifically, Adobe Experience Manager (AEM), part of Adobe Experience Cloud, acts as the "center of gravity" for Adobe's DXP efforts. Adobe offers a broad collection of technologies, which are increasingly cloud-based and largely aimed at digital marketing use cases. Customers increasingly use Adobe's technologies to support other use cases, too, such as intranets and extranets.

Strengths

- **Digital marketing focus:** Adobe provides best-of-breed functionality for digital experiences focused on digital marketing. When paired with Adobe Marketing Cloud and Adobe Advertising Cloud, Adobe's DXP offering serves as a premium offering for B2C and, increasingly B2B digital marketing.
- **Packaging:** Adobe Experience Cloud is a comprehensive set of well-regarded and logically rationalized DXP components. All Adobe Experience Cloud products share a set of core services geared toward assessing and optimizing digital experiences with a common framework for content and audiences.
- **Usability:** Adobe's focus on usability by business roles improves its customers' agility and responsiveness. Reference customers report that their marketing groups are empowered to create, manage and optimize brand sites and campaigns responsibly and without the intervention of IT staff. Adobe Sensei, Adobe's artificial intelligence (AI) capability, is increasingly employed to assist users and automate tasks.

Cautions

- **Nonmarketing use cases:** Adobe's strong focus on digital marketing, from positioning and product development standpoints, may make it less appealing to organizations that want a DXP for other purposes. Service portals, for example, require security and integration characteristics to ensure personalized access to aggregated systems, rather than targeted content and campaigns.
- **Deployment complexity:** Behind the cloud packaging constructs, Adobe's DXP product components are complex, and Adobe is still working to integrate them. Customers report a need for engineering talent, some of which has proven difficult and expensive to obtain.
- **Price:** Adobe's DXP solutions are typically priced at a premium. Adobe has recently introduced lower-priced options, including AEM Sites Basic, AEM Assets Basic and Adobe Analytics foundation, for midmarket organizations, but large organizations will still find Adobe's pricing relatively high.

BloomReach

BloomReach is based in Mountain View, California, U.S., and has offices in Europe, India and Australia. It acquired Hippo, a Netherlands-based company, in 2016 to combine Hippo's DXP capabilities with its own search and personalization offerings. Hippo CMS, a commercially supported open-source platform based on the Apache Jackrabbit repository, is available in a commercial enterprise edition called BloomReach Experience, which is mainly sold as a cloud PaaS. BloomReach Experience is used by a wide range of organizations, from major brands to organizations in the government and healthcare sectors, most often for public-facing websites.

Strengths

- **Machine learning:** BloomReach Experience extends Hippo CMS with AI-powered personalization and content-marketing capabilities for midmarket and large organizations that want highly differentiated digital experiences.
- **Flexibility:** BloomReach Experience provides a good balance of content management, portal and personalization functionality, while using APIs widely to fuel custom development, integration and multichannel support.
- **Architecture:** BloomReach Experience demonstrates architectural discipline with loose coupling of content, logic and presentation. Its architectural strength facilitates interoperability and ensures the integrity of content across channels, touchpoints and devices.

- **Product integration:** Integration of BloomReach Personalization with BloomReach Experience is a work in progress. Some customers report unmet expectations regarding combined features and functions.
- **Scalability:** Some BloomReach customers report limitations with complex security and authentication scenarios when its platform is used in intranet and extranet scenarios.
- **Access to expertise:** Some BloomReach Experience customers have reported a steep learning curve at the start of their efforts, along with some difficulty finding expertise for implementation.

censhare

Censhare , which is based in Munich, Germany, offers a "universal, smart content management" platform. Censhare's product encompasses WCM, digital asset management (DAM), PIM, marketing resource management and brand management. The company focuses on manufacturing, retail and media organizations. Most of censhare's customers use its platform primarily for B2C use cases, but a substantial number also use it for B2E efforts.

Strengths

- **Data model:** Censhare's unified in-memory graph-based data model supports a centralized and authoritative content source that works across content types, channels, audiences and media. In addition to content management, it applies readily to business cases requiring DAM, PIM, collaboration and process management, marketing resource management and brand management, among other things.
- **Flexibility and implementation speed:** Customers value censhare's flexibility and versatility, and rate it highly for time to implementation, relative to competing systems.
- **Content integrity:** Customers report that censhare's centralized approach enables them to gain more accurate and timely insight into content usage and reporting.

Cautions

- **Aggregation:** A unified and structured system like censhare's may not be practicable for organizations that have many necessarily disparate systems of record for products, customers and processes.
- **Usability and training:** Customers report that employees require significant training to adapt to the task of managing content in a structured way. They recommend that other censhare customers appoint a person responsible for introducing and promoting the product and for training people in how to use it.
- **Geographic presence:** Although censhare is investing in sales and support resources in the U.S. and is gaining early traction in Asia/Pacific, customers may find it difficult to locate expertise and community support outside Germany and surrounding countries.

CoreMedia

CoreMedia is based in Hamburg, Germany, and has offices in the U.S., U.K. and Singapore. The CoreMedia Content Experience Platform has three primary components: CoreMedia CMS, CoreMedia DAM and LiveContext, a set of productized digital commerce integrations. CoreMedia also provides platform modules for social interactions and personalization. CoreMedia focuses on selling to enterprises with complex requirements. It has a wide range of large customers across several industries. Its technology is used for intranets, extranets and public-facing channels.

Strengths

- **Usability:** CoreMedia's digital experience portfolio is user-friendly, with flexible modes of delivery for both internal and public-facing digital experiences.
- **Speed to market:** CoreMedia customers report that they get up and running relatively quickly and at low cost, even when undertaking relatively complex DXP initiatives.
- **Digital commerce integration:** CoreMedia has a good track record of integrating with leading digital commerce platforms, including those of IBM, Salesforce and SAP. It offers flexible digital experience integration for digital commerce use cases.

Cautions

- **Track record:** CoreMedia's technology serves as the "center of gravity" for DXP initiatives less often than the technologies of Leaders. Organizations often use LiveContext to add content and experience management capabilities to a separate DXP foundation focused on digital commerce or portals.
- **Multilanguage and multisite support:** Some customers report inefficiency in relation to multilanguage and multisite taxonomies, which requires them to replicate content across sites.
- **Geographical presence:** A large proportion of CoreMedia's customers are based in EMEA, predominantly Germany. Although CoreMedia has begun to expand into North America and other regions, potential customers should ensure that there are adequate implementation support services in their region.

Crownpeak

Crownpeak is based in Denver, Colorado, U.S., and has offices in London, U.K., as well as New York and Sandy, U.S. It provides its Digital Experience Management (DXM) suite as a hybrid multitenant SaaS platform, together with its Digital Quality Management (DQM) product (a result of Crownpeak's merger with ActiveStandards in 2016) that addresses digital compliance across an enterprise. Crownpeak acquired Evidon, an organization addressing digital governance for Consent, Privacy and GDPR compliance and digital transparency, in August 2017. Crownpeak sells mainly to large enterprises that manage diverse digital products, most often public-facing.

Strengths

- **Product flexibility:** Architectural advances have improved the flexibility and interoperability of Crownpeak DXM. Crownpeak's Digital Experience Layer (DXL) enables its technology to be deployed in multiple scenarios across the "customer journey," and can form the heart of an API-oriented architecture.
- **SaaS delivery:** Crownpeak's native SaaS cloud deployment model is rare in the DXP sector. It remains a differentiator for organizations making aggressive investments in the cloud.
- **Digital quality management:** The inclusion of the DQM product in Crownpeak's portfolio caters to enterprise customers' desire to manage brand integrity and compliance, while ensuring a consistent experience across many digital properties.

Cautions

- **Portal capability:** The Crownpeak DXM suite focuses on WCM services and lacks the portal capabilities and track record of some competitors' offerings.

- **Marketing execution:** Crownpeak is less well known to Gartner clients than leading DXP competitors that have spent as much, or less, time in the market. It must improve its marketing execution to give customers' confidence in its long-term growth prospects.
- **Geographic presence:** Crownpeak's installed base is concentrated in the U.S., with only approximately one-quarter of its customers based elsewhere, primarily in Europe. Prospective customers outside the U.S. should check for support in their region.

Episerver

Episerver , which has U.S. headquarters in Nashua, New Hampshire, and European headquarters in Stockholm, Sweden, launched its Digital Experience Cloud in 2015. This offering includes Episerver CMS, Commerce, Campaign, Find and the AI-based Personalization (for content and product recommendations). It also includes the Digital Experience Hub to enable interoperability with other systems. The offerings work together to form a hybrid platform of single and multitenant components that can be deployed on Microsoft Azure PaaS. Episerver's technology is most often used for public-facing websites, often with commerce capability, across B2B and B2C use cases.

Strengths

- **Integrated platform:** Digital Experience Cloud has a broad set of capabilities for a wide range of use cases, from portals to brand sites and digital commerce. It is a well-integrated and rationalized package.
- **Usability:** Customers hold Episerver in high regard for usability. They value its focus on tools for collaborative content development by content contributors, designers and developers.
- **Scalability:** Reference customers appreciate Episerver's scalability and performance. Some indicated that Episerver's dependability enables them to focus on innovation and differentiation, rather than maintenance and upkeep.

Cautions

- **Partner ecosystem:** Episerver has fewer technology and ecosystem partners than the Leaders in this market. Organizations may have difficulty finding qualified partners or skills.
- **Customization:** Some Episerver clients report that implementation for complex use cases requires more customization than they anticipated.
- **B2E use cases:** Though capable of enabling some internal use, Episerver lacks support for employee-facing solutions that require general-purpose collaboration, knowledge management and role-based access. Episerver focuses on public-facing content management, digital marketing and commerce in a packaged solution.

GX Software

GX Software , which is based in Nijmegen, Netherlands, delivers a DXP through its XperienCentral offering — essentially a WCM capability focused on customer experience management and customer communications. GX Software supplements its DXP capability via a partnership with BlueConic, a GX Software spinoff that offers a customer data platform and digital marketing hub. GX Software also provides interactive forms and connectors. Its installed base spans various industries, but the company is particularly strong in the European financial services industry.

Strengths

- **Connectors:** GX Software provides an expansive range of prebuilt connectors to a range of solutions, including those of some of its competitors.
- **Ease of use for authoring and editing:** GX Software customers report strong usability, especially for content creation and editorial tasks.
- **Industry focus:** GX Software has a proven track record of serving organizations in the financial services, insurance and government sectors.

Cautions

- **Business process integration:** Although GX Software serves content management requirements sufficiently, customers have expressed dissatisfaction with the ability to integrate business processes and systems — a key requirement for DXP initiatives.
- **Geographic presence:** GX Software has a small geographical footprint, compared with most providers. Organizations outside Europe may find the availability of support lacking.
- **Support documentation:** Some GX Software customers report shortcomings in product documentation for developers, administrators and business users. The company has taken steps to improve this situation with an ExperienCentral Documentation wiki.

IBM

IBM , which is based in Armonk, New York, U.S., delivers DXP functionality through IBM Digital Experience Manager, in conjunction with IBM Watson Content Hub. IBM offers its DXP functions in two packages aligned with the most popular use cases: IBM Customer Experience Suite and IBM Employee Experience Suite. With a rich portal history based on IBM WebSphere Portal, IBM delivers a broad set of DXP functions supporting a wide range of industries and use cases.

Strengths

- **Market understanding:** IBM anticipated DXP demands better than most competitors, having espoused the virtues of the platform over five years ago. IBM's vision remains strong, with logical product packages and a keen eye for technological innovation.
- **AI:** IBM was an early and aggressive adopter of AI to improve user engagement and the user experience. Increasingly, customers will be able to invoke IBM Watson services to support automation and improve relevance, guidance and the overall experience.
- **Functional breadth:** Few DXP vendors can match IBM's list of capabilities, features and functions. These have been generated over a long (and continuing) history of supporting large enterprises with complex digital experience needs.

Cautions

- **Cloud transition:** IBM's push for cloud computing has introduced some redundancy and overlap to its DXP portfolio. For example, IBM now offers the Watson Content Hub as an alternative to its Web Content Manager. For any given workload or initiative, prospective customers must choose either an innovative but fledgling offering, or an established, proven offering that might receive less investment from IBM in the future.
- **Complexity:** Existing and prospective customers often view IBM's DXP offerings as overly complex and feature-laden, compared with some competing offerings.
- **"Legacy" reputation:** Many customers regard IBM's digital experience offerings as traditional, "legacy" systems. Some favor newer solutions from newer vendors for next-generation digital experiences.

Jahia

[Jahia](#) , which is based in Geneva, Switzerland, includes various products in its DXP portfolio: Digital Experience Manager, Marketing Factory, Form Factory and separately licensed connectors. Jahia offers a strong Java framework and Open Service Gateway Initiative (OSGi) support. It focuses on selling to customers with a range of needs centered on content, applications and customer data. It has had early success in the financial services, travel and hospitality, and automotive industries.

Strengths

- **Digital marketing:** Jahia's complementary digital marketing capabilities, including customer data management, A/B and multivariate testing, and audience segmentation, make it a strong contender for customer-facing use cases.
- **Architecture:** Jahia's architecture supports access to, and delivery of, both content and applications, unlike many DXPs that grew from the combination of acquired portal and WCM capabilities. In this way, it avoids the compromises and conflicts that many Java-centric competitors have to make.
- **Service and support:** Jahia's customers report that it offers excellent support, both during and after deployment.

Cautions

- **Marketing execution:** Jahia remains a relative unknown in the DXP market, especially among business influencers, and is seldom mentioned by users of Gartner's client inquiry service. Organizations looking for DXPs might want to opt for a better-known and more popular platform to ensure the availability of skills and ecosystem.
- **B2E use cases:** Jahia's track record and continued development to support predominantly customer-facing use cases leave it less equipped for other use cases, especially employee-facing initiatives.
- **Growth:** Jahia generates relatively little revenue, compared with many other DXP providers. This may deter some potential customers from using Jahia for the strategic initiatives that DXPs are intended to support.

Kentico Software

[Kentico Software](#) is based in Brno, Czech Republic, and has its U.S. headquarters in Bedford, New Hampshire. It offers an all-in-one solution aimed at WCM, digital commerce, online marketing, intranets and collaboration. Kentico emphasizes its extensive out-of-the-box functionality and rich customization features, which it aims at the midsize business market.

Strengths

- **Growth:** Kentico, an emerging European vendor in the DXP market, has expanded rapidly into other regions, including North America and Australia. It is quickly growing in popularity, which may increase the availability of skills and expertise.
- **Midmarket focus:** Kentico differentiates itself through its appeal to midsize businesses, especially those looking for packaged capabilities to shorten their time to market and lower implementation costs.
- **Price:** Kentico offers a clear and predictable licensing model with a low starting price point. Customers can increase their investment incrementally as their digital experience ambition grows.

Cautions

- **Interoperability:** Kentico is valued most for an out-of-the-box solution for marketing, commerce and intranet use cases, but customers report difficulty integrating its technology with the third-party offerings they require to fulfill DXP requirements.
- **Limited support for B2E use cases:** Kentico CMS Intranet does not focus on the general-purpose collaboration and knowledge management often required for intranets that support digital workplace initiatives. Rather, Kentico's intranet solution is best placed to meet the needs of a traditional corporate communications intranet.
- **Partner ecosystem:** Kentico's customers report relatively low satisfaction with the quality, effectiveness and availability of professional services in the Kentico ecosystem.

Liferay

[Liferay](), which is based in Diamond Bar, California, U.S., offers a Java-based, open-source DXP platform in two editions. The commercially supported Liferay Digital Experience Platform (formerly Liferay Portal Enterprise Edition), is available on subscription, and is most often adopted by large enterprises. Smaller organizations, and those pursuing project-based DXP initiatives, often use the free, open-source Liferay Portal 7 Community Edition. Liferay targets all DXP use cases, across industries, but shows particular strength — in line with demand — in the financial services, high tech, government and business service sectors.

Strengths

- **Flexibility and agility:** Liferay shines when its technology is used to build highly customized experiences that incorporate external business applications. Liferay's customers consider its platform's ability to support flexible architectures and development approaches, such as agile, to be outstanding.
- **Market responsiveness:** Customers value Liferay's organic innovation, which contrasts with the "innovation through acquisition" approach taken by many competitors. Liferay has a good track record for converting customers' demands and ideas into new product features and enhancements.
- **Service and support:** Liferay customers who have licenses for the Liferay Digital Experience Platform (or Liferay Portal Enterprise Edition) report that they receive excellent customer support and an excellent overall customer experience.

Cautions

- **Lack of own SaaS or PaaS:** Some Liferay customers regret the absence of a Liferay-provided DXP SaaS or PaaS offering to reduce the requirement for internal or third-party technical skills. Some Liferay partners provide cloud hosting, but many potential customers look for a more strategic commitment to the cloud as a means to scale, exploit big data analytics and innovate rapidly.
- **WCM capability:** Organizations looking for a comprehensive DXP may find that Liferay's WCM capability lags behind that of some competing offerings. Organizations with experience of best-of-breed WCM applications expect functionality that is easier to use and designed for business users.
- **Analytics:** Liferay customers may need to invest separately in best-of-breed analytics. Surveyed Liferay reference customers scored Liferay's analytics capability relatively low.

Microsoft

[Microsoft](), which is based in Redmond, Washington, U.S., offers a broad and growing range of capabilities, across Azure, Dynamics Business Solutions and Office 365, that can be used to address DXP requirements. As part of Office 365, SharePoint Online is the focus of most DXP efforts by Microsoft customers; it provides content services and a front end for building and managing sites and portals. SharePoint Server, currently in its 2016 iteration, remains a customizable platform for portals and sites deployed on-premises or by third-party hosting providers. Microsoft SharePoint and Office 365 focus on digital workplace, intranet and extranet use cases. Microsoft provides Azure e-commerce solutions and Dynamics 365 portal capabilities for internet use cases.

Strengths

- **Market presence:** Microsoft has established itself as the foundation for the digital workplace in far more organizations than any other DXP provider. As such, Microsoft and its SharePoint and Office 365 offerings have unmatched influence on the employee experience aspect of DXPs.
- **Continuous innovation:** Microsoft is putting power into the hands of end users faster than other providers. It is doing so in a variety of ways — from employing machine learning to create dynamic personalized home pages to democratizing the creation of experiences and workflows with tools like PowerApps and Flow.
- **Partner ecosystem:** Microsoft SharePoint marshals an unmatched ecosystem of customers, partners and third-party software providers to enhance, build and deploy DXPs for numerous industries and use cases.

Cautions

- **Public-facing use cases:** Customers should avoid SharePoint for public-facing use cases, primarily because Microsoft has retired the public-facing licensing option. In addition, most organizations require more design flexibility, better content targeting, and external facing security features for which SharePoint is not readily equipped.
- **B2E focus:** Microsoft offers deep and readily deployable capability for B2E DXP scenarios, but less fully developed and competitive offerings for B2C commerce and customer service. Customers seeking a unified DXP platform that supports efforts across employee, customer, partner, citizen and student use cases may find themselves building and assembling capabilities required for external-facing use cases.
- **Change management:** Microsoft's continuous innovation frustrates some organizations. They complain of unfinished feature introductions and difficulty both explaining new features and controlling their use by employees. To its credit, Microsoft has moved more effectively than most vendors to address such issues, with services like FastTrack and customer success manager expertise to help organizations plan and manage change.

OpenText

[OpenText](), which is based in Waterloo, Ontario, Canada, provides the OpenText Experience Suite. This suite includes DAM, WCM, customer communications management and workforce optimization capabilities. OpenText's broader portfolio includes suites and platforms supporting enterprise information management, with content management, business process management, business networks, analytics and discovery capabilities. The recent acquisition of Covisint adds identity and access management and Internet of Things (IoT) capabilities to its portfolio. With its Experience Suite, OpenText targets various audiences, including employees, partners and suppliers, as well as customers, with the common goal of supporting a continuous customer journey.

Strengths

- **Functional breadth:** OpenText offers a great breadth of functionality, including business process management, customer communications management and campaign management, in combinations rarely matched by other DXP providers.
- **Customization:** Customers with sophisticated requirements report that OpenText's TeamSite WCM offering, an integral part of its DXP solution, is highly customizable, integrates well with their existing content services and security infrastructure, and supports agile environments with dynamic deployment requirements.
- **Marketing strategy:** OpenText's focus on the common goal of the "continuous connected customer journey" — even when initiatives are partner-, supplier- and employee-facing — suits the aspirations of leading-edge organizations pursuing DXP initiatives.

Cautions

- **Product rationalization:** OpenText's functional breadth derives from many acquired products, integrated to varying degrees. The Experience Suite itself is a work in progress as OpenText strives to integrate and rearchitect various products to work on a common, cloud-capable platform.
- **DXP market presence:** Organizations undertaking new DXP initiatives include OpenText products in their plans less often than those of DXP market leaders, judging from interactions with users of Gartner's client inquiry service. Gartner customers seeking DXP capability may already own OpenText products, but they often regard them as "legacy" systems that need replacement or enhancement.
- **Innovation:** Some OpenText customers perceive a lack of innovation and stagnant development in relation to OpenText's older acquired offerings. OpenText customers with offerings like Web Experience Management, StreamServe and MediaBin will be urged to move to OpenText TeamSite, Exstream and Media Management, respectively, to reap the benefits of innovation.

Oracle

Oracle , which is based in Redwood City, California, U.S., identifies its DXP as Oracle CX Cloud Suite, a collection of SaaS business applications based on a common PaaS. The PaaS includes data and AI, workflow, analytics and optimization, identity management, experience management, integration and security, and content services. Oracle Content and Experience Cloud (CEC), the content core of the CX Cloud Suite, provides content services to all touchpoints, including websites, marketing, commerce and service applications, as well as mobile apps, chatbots, IoT devices and custom apps. Existing customers pursuing DXP initiatives with Oracle software have often used WebCenter Suite Plus, which includes WebCenter Portal, WebCenter Sites and WebCenter Content. WebCenter Suite Plus remains an option for on-premises and hybrid deployments. Oracle plans to deploy CEC to serve as the content hub for Oracle WebCenter Plus in order to facilitate the transition to CX Cloud Suite.

Strengths

- **Functional breadth:** Oracle offers a broad array of digital experience functionality, and a wealth of complementary technologies via its PaaS offering.
- **Industry expertise:** Oracle offers differentiated vertical solutions with off-the-shelf data models, processes, policies, user experience, analytics, integration and partners, for over 20 industries.
- **B2C use cases:** Oracle's CX Cloud Suite represents an appealing vision for organizations looking for comprehensive, preintegrated solutions that serve the entire customer journey, from preacquisition to marketing, sales, service, social community and re-engagement.

Cautions

- **Product strategy:** Oracle's product strategy for the digital experience is somewhat misaligned with customer demand. CX Cloud Suite, with its broad application-level functionality, exceeds most organizations' DXP needs. While the PaaS-backed CX Cloud Suite, including CEC, shows promise as the basis of a lean, modern DXP, Oracle's offering of a broad CRM suite is a significant superset of Gartner's DXP vision.
- **Deployment complexity:** Some of Oracle's DXP customers report that deployment is an unexpectedly complex task, with a steep learning curve and longer-than-average implementation times.
- **Ease of doing business:** Some existing and potential Oracle customers report that Oracle is difficult to do business with, and that its DXP offerings are hard to find and try out without a significant commitment. Oracle is moving to offer modern pricing models to help alleviate this concern.

Oxcyon

Oxcyon , which is based in Middleburg Heights, Ohio, U.S., offers the Centralpoint DXP. Centralpoint is fundamentally a single-source, structured content management system that serves as the unified foundation for various solutions that support public-facing sites, intranets and extranets, single-source publishing, DAM, learning management and email, among other things. Oxcyon also provides 220 modules to extend its functionality and integrate with third-party applications. It has demonstrated strength in the healthcare, manufacturing and publishing sectors, while also serving clients in many other industries. Centralpoint is used for both internal and external DXP use cases.

Strengths

- **Content management versatility:** Oxcyon offers document management capabilities, along with highly centralized, structured and granular content management (employing the Darwin Information Typing Architecture), to ensure coordination and reuse across digital experiences. Its organizational model is uniquely flexible and adaptable as organizations, their roles and their content change.
- **Customer responsiveness:** Longtime customers report that Oxcyon is extremely responsive to, and accommodating of, their function-related requests. It often implements requested changes without charge when it is beneficial for the community at large.
- **Speed of deployment:** Oxcyon has been effective in competitive sales situations. It has demonstrated fast time to market by creating high-fidelity prototypes before receiving any commitment from the customer.

Cautions

- **Messaging and positioning:** Oxcyon must improve its marketing strategy and execution to attract and engage the customers that can benefit most from its unique strengths as a unified foundation for DXP efforts. Its messaging and positioning requires refinement and focus in order to attract more customers.
- **Partner ecosystem:** Oxcyon's hands-on support model and limited number of implementation partners could impede its growth. Oxcyon has relatively few formal relationships with design agencies, which are enormous influencers of digital experience initiatives.
- **Usability for some audiences:** Although content developers and information architects favor Centralpoint for its usability, content managers report that it is difficult to learn and use.

Salesforce

Salesforce , which is based in San Francisco, California, U.S., makes the Community Cloud offering the centerpiece of its DXP strategy. Community Cloud inherits core CRM features such as Sales Cloud, Service Cloud, Chatter (social collaboration) and Force.com custom applications, as well as core capabilities from the Salesforce Customer Success Platform (such as search, identity, workflow, Lightning and APIs). Salesforce Lightning Bolt provides system integrators and ISVs with a means to create and distribute industry solutions on the Salesforce AppExchange store. Community Cloud aims to serve many purposes, with an emphasis on enabling customers to extend Salesforce apps and data to their own customers, partners and employees. Customers in many industries use Community Cloud, but it shows particularly strength in the manufacturing, financial services, healthcare, retail and high-tech sectors.

Strengths

- **Cloud enablement:** Salesforce Community Cloud fully embraces the advantages of a cloud architecture, such as reduced time to market, continuous innovation, improved security, high scalability, built-in mobile support and big data analytics.
- **B2B and B2C use cases:** Salesforce has significant strengths in, and adoption for, partner and customer-facing use cases. It offers rich, responsive, personalized experiences for business and partner communities and individual customers.
- **Customer satisfaction:** Salesforce Community Cloud customers report overall high levels of satisfaction. Those with experience of using traditional on-premises portal platforms and WCM systems as the basis of their DXPs often indicate that Community Cloud "just works."

Cautions

- **Customization:** Although Salesforce Community Cloud is a broadly capable platform, for which out-of-the-box deployments are fairly standardized, some customers report that building compelling and differentiated digital experiences for customer-facing scenarios requires specialized expertise and tools. Salesforce and its partners offer an increasing number of frameworks designed to facilitate customization.
- **WCM functionality:** Salesforce Community Cloud lacks sufficient WCM functionality for some DXP use cases. Customers that need ample WCM capability must supplement it with third-party products. Salesforce now offers the CMS Connect tool to facilitate and enrich integration with third-party WCM offerings, but the need for a separate WCM system still adds cost, complexity and the potential for conflict with overlapping systems.
- **Price:** Salesforce Community Cloud is a premium-priced solution. Although customers report relatively high levels of satisfaction in terms of value for money, the high price often deters potential customers from including Community Cloud on DXP shortlists. Salesforce is moving to address this with new packaging and pricing models.

SAP

SAP , which is based in Walldorf, Germany, identifies its DXP as SAP Cloud Platform Experience Maker. The offering includes a set of bundled services: SAP Fiori Cloud, SAP Cloud Platform Portal, SAP Cloud Platform Build, SAP Cloud Platform Web IDE, SAP Cloud Platform Mobile Services, SAP Cloud Platform Integration, SAP Cloud Platform Workflow, SAP Jam, SAP Cloud Platform Document service, SAP CoPilot, and SAP Cloud Platform API Management. SAP Enterprise Portal, a long-established horizontal portal offering, remains the on-premises counterpart

serving SAP Business Suite and the on-premises edition of SAP S/4HANA. SAP targets all DXP use cases, but most of its customers focus on B2E and B2B use cases.

Strengths

- **User-centric design:** SAP has gone further than most vendors to incorporate and scale user-centric design practices in its products and services. SAP Fiori supports simplification of business processes by role, as well as a general shift from monolithic solutions to activity-based apps. In addition, SAP's DXP offering adds integrated prototyping and end-user feedback tools.
- **SAP family integration:** Customers heavily invested in SAP business applications value SAP Cloud Platform Experience Maker's ability to simplify business processes while working as an extension of SAP's many business applications.
- **Industry expertise:** SAP's deep vertical-market strategy, strong geographical presence, and stable and expanding role as a foundation for vital enterprise business processes make it a safe choice for SAP customers in a relatively volatile market.

Cautions

- **Non-SAP customers:** Generally, it is organizations with significant investments in SAP business software that derive substantial benefit from SAP's DXP offering. SAP's DXP is of little interest to non-SAP application customers.
- **Content management:** SAP lacks a unified vision for WCM, which is a typical starting point for many DXP efforts. Options abound. They range from SAP Jam Collaboration, which can provide a content feed, to SAP Hybris, which can provide product information and limited WCM capabilities, to various partner-provided solutions for WCM and ECM, to a headless content management system in some situations. However, SAP offers little guidance or sense of direction to customers.
- **Learning curve:** Some SAP Cloud Platform Experience Maker customers, especially those employing traditional SAP developers, report a steep learning curve for development and customization, and advise preparation. Modern web and user experience developers expressed more favorable opinions.

SDL

[SDL](#), a language translation and content management company based in Maidenhead, U.K., offers SDL Tridion DX, comprising SDL Tridion Sites and SDL Tridion Docs. SDL aims to help companies bridge the gaps between marketing, commerce and support content, while using the technologies of their choice. SDL Tridion DX constitutes the vendor's common content foundation, which is made extensible and interoperable with integration frameworks and connectors to relevant third-party solutions. SDL has a strong global presence, aided by significant growth in northern Asia through implementation partners.

Strengths

- **Architecture:** SDL's microservices architecture, along with its low-code data integration framework, enables the flexibility and interoperability required of a resilient DXP.
- **Internationalization:** The overarching SDL business focuses on providing software and services for internationalization, localization and language translation. SDL Tridion DX is therefore particularly well-suited — from its architecture to its functions — to organizations with these needs.

- **Product innovation:** SDL's expertise in language processing gives it significant potential for innovation in the DXP market. This is particularly the case for AI-driven content authoring and delivery and conversational user experiences.

Cautions

- **Strategic direction:** SDL's strategic divestment of some marketing-related offerings appears to run counter to a comprehensive DXP strategy. Some organizations may therefore decide to use SDL Tridion primarily for WCM, while assembling other components.
- **Customization complexity:** Some SDL customers have found custom development and integration problematic. In particular, customers on older versions of SDL's software report that it is complex and hampers upgrades. Customers with newer versions of Tridion appear to have a better experience. Customers are advised to stay abreast of product updates.
- **Partner ecosystem:** SDL's implementation partner community is relatively small and lacks the global presence of some of the Leaders' communities.

Sitecore

[Sitecore](), which is based in Copenhagen, Denmark, offers the Sitecore Experience Platform — a collection of capabilities built around Sitecore Web Experience Manager, a WCM offering, and Sitecore Experience Database (xDB), a single marketing repository for customer interaction data. In addition to WCM and customer data, the platform offers analytics, testing and optimization, journey mapping, cross-channel delivery and commerce tools. Sitecore supports a wide range of DXP use cases, and offers management capabilities for content, digital assets and product information. Sitecore's local presence and large partner ecosystem have enabled global penetration of many vertical markets.

Strengths

- **Functional breadth:** Sitecore, with its WCM heritage, has established itself as a vendor with both a strategy to address various industries and a substantial array of horizontal DXP capabilities, including personalization, context awareness and analytics.
- **Applied analytics:** In addition to appreciating Sitecore's fundamental strength in content management, customers have high regard for the Sitecore Experience Platform's ability to exploit web analytics. Sitecore customers value the platform's insights, which are geared toward IT and business users alike.
- **Interoperability:** Sitecore's revamped, API-oriented architecture (in version 8), along with an increasing array of connectors, reportedly benefits organizations that previously spent a considerable time working on custom integrations.

Cautions

- **Usability for business users:** Some customers report that casual contributors find the Sitecore Experience Platform hard to use and require more training than expected. The recently released Sitecore 9 seeks to address these issues with various user experience enhancements.
- **Service and support:** Some Sitecore customers report dissatisfaction with the quality and effectiveness of the vendor's customer support and professional services. Sitecore depends entirely on partners for implementation services, and customer satisfaction for such services has been inconsistent, although generally improving.
- **Total cost of ownership:** Several Sitecore customers reported higher-than-expected total cost of ownership because of unforeseen complexity in implementation.

Squiz

[Squiz](#) is a global company based in Sydney, Australia, with offices in the U.K., Europe, New Zealand and the U.S. The Squiz Customer Experience Platform is based on the open-source Squiz Matrix WCM system, together with the Squiz-owned Funnelback search and insight engine, and Squiz Analytics. It includes capabilities for content testing and marketing automation. Squiz's customers are largely in the government, education and financial services sectors, but the company also targets the media and publishing, healthcare and utility sectors. Squiz's technology is used for both public-facing websites and intranets and custom web applications.

Strengths

- **Ease of use:** Customers report that Squiz Matrix, the WCM system at the core of its DXP offering, is easy to use throughout the process of creating and managing content.
- **Total cost of ownership:** Squiz's commercial open-source model entails a lower initial cost than most other DXP providers. In addition, many customers report a relatively low total cost of ownership, compared with other providers.
- **Technology partner ecosystem:** Squiz has begun expanding its technology partner ecosystem by integrating with products from vendors such as Ikabo, Marketo, Verint and SugarCRM.

Cautions

- **Customer support:** Some clients report difficulty maintaining and extending Squiz's offerings, as well as a shortage of available technical skills from the vendor, its partners and peer communities.
- **Commerce integration:** Limited packaged commerce integration may complicate Squiz deployments for some DXP use cases. Although Squiz includes a range of custom integration capabilities and connectors for certain marketing systems and payment gateways, digital commerce connectors are still in development.
- **Market presence:** Recognition of Squiz's brand is relatively poor, in comparison with those of leading DXP providers, especially in North America.

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.

The transition from the Magic Quadrant for Horizontal Portals to the Magic Quadrant for Digital Experience Platforms entailed substantial changes to the market definition and inclusion criteria, resulting in many changes to the list of vendors included.

Added

Vendors in this Magic Quadrant that did not meet the inclusion criteria for 2016's "Magic Quadrant for Horizontal Portals" are:

- Acquia

- BloomReach (having acquired Hippo)
- censhare
- CoreMedia
- Crownpeak
- GX Software
- Oxcyon
- SDL

Dropped

- Backbase, because it did not fulfill a new criterion intended to ensure applicability and use across many industries. Backbase markets and sells primarily to banking and financial services organizations.
- Drupal, because it did not meet the revised inclusion criteria for this report. As an open-source organization, not a commercial vendor, Drupal did not fulfill the $7 million annual revenue requirement.
- Hippo, because it has been acquired by BloomReach.

Inclusion and Exclusion Criteria

Product Packaging Criteria

- The functions described below (under "Functional Criteria") must be identifiable as one cohesive, integrated product or suite.
- The vendor must provide support for any third-party software or services required for the functions described below. For example, if a customer has a technical issue with any of the functionality listed below, they should be able to contact the named vendor for support.
- Any open-source or third-party software required for the functional inclusion criteria must be integrated in the vendor's DXP.
- Customers must not be required to have contracts with multiple vendors to perform the functions described below.

Business Inclusion Criteria

- **Revenue and market criteria:**
  - The DXP offering must have generated revenue of at least $7 million (U.S. dollars) in annual license and/or subscriptions in the calendar year 2016. Revenue includes licenses, subscription services and maintenance. It excludes professional services.
  - The vendor must have acquired at least five new customers over the past four quarters (as of 1 July 2017).
  - The vendor must demonstrate support for a broad digital experience ecosystem through development, acquisition or partnership with pertinent providers.
- **Geographic coverage:**
  - The vendor must provide sales and support for its DXP product(s) in at least two of the following five regions: North America; Latin America; Europe, the Middle East and Africa; Japan; and Asia/Pacific.
  - At least 10% of the vendor's revenue must derive from customers based in at least two of these regions.
- **Cross-industry coverage:**

- At least 10% of the vendor's revenue derives from organizations in at least three of the following industries: manufacturing, government, retail, financial services, insurance, healthcare, consumer goods, education, energy and utilities, telecommunications, aerospace, transportation, life sciences, hospitality and travel, real estate.
- The vendor's DXP marketing must target customers across at least three of the industries listed above.

Functional Inclusion Criteria

- The vendor's DXP(s) must include capabilities listed in all three main sections of the aforementioned "Functional Components of Digital Experience Platforms" (see under "Market Definition/Description").
- Qualifying DXP offerings must be able to perform or support the following functions:
  - **Content management:**
    - The ability to create, organize and publish content assets, including text, images and rich media, in the context of the digital experience.
    - The ability to configure workflow for content review, approval, scheduling and publishing.
  - **Search and navigation:**
    - The ability to index content and data to enable search, navigation, discovery, recommendation and insight for end users (such as customers and employees).
  - **Collaboration:**
    - The ability to allow IT developers, designers and contributors to collaborate on the creation, maintenance and continual improvement of the digital experience.
    - The ability to allow audiences to participate in social forms of interaction, like forums, wikis, blogs, activity streams and social communities.
  - **Presentation:**
    - The ability to create and configure presentation via page templates and components.
  - **Personalization:**
    - The ability to enable content administrators and business users to direct relevant content and information to anonymous (non-logged-in) audiences, based on context cues such as location awareness, type of device and browser history.
    - The ability to enable personalization through a variety of static user-centric attributes, dynamic session-centric attributes, collaborative filtering or social relationships.
  - **End-user customization:**
    - The ability to enable end users to customize their own experience by subscribing to, configuring and manipulating components and views.
  - **Analytics and optimization:**
    - The ability to provide analytics geared to monitoring, measuring and improving the business outcomes of DXP efforts.
    - The ability to provide or support optimization techniques such as split A/B testing and multivariate testing.
  - **Security administration:**
    - The ability to manage access rights and privileges by individual, group or role.

- The ability to provide single sign-on for access to aggregated and/or linked applications, resources and services.
  - **Integration and aggregation:**
    - The ability to aggregate (via API), present, and personalize content and data from a wide variety of sources without necessitating migration or import into a central repository.
    - The ability to integrate with various third-party systems of record, such as CRM systems, HR systems and directory services, to drive personalization.
  - **Development:**
    - The ability to create apps and dashboards employing aggregated data and services from various integrated or aggregated applications.
    - The ability to enable customers, partners, or independent ISVs to build components or apps based on the DXP. Such components or apps should be deployable on many instances of the DXP.

Evaluation Criteria

Ability to Execute

Enterprises evaluating DXPs have wide-ranging requirements for various audiences. A breadth of functionality supporting different DXP deployment scenarios, long-term vendor viability, a demonstrated track record of meeting customer needs, and an expanding market presence are all important for Ability to Execute in this market.

A vendor that may not be rated highly in terms of Ability to Execute in the general DXP market may still provide compelling or leading-edge functionality for a particular portal deployment scenario or for companies in a particular industry.

Product or Service

This criterion concerns core goods and services that compete in and/or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills and so on. These goods and services can be offered natively or through OEM agreements and partnerships as defined in the market definition and detailed in the subcriteria.

Product assessments focus on essential DXP functionality, integration, usability, scalability, manageability, security and ease of deployment. Special consideration is given to product integrity, given some vendors' tendency to provide a collection of disconnected products and features, rather than a cohesive platform.

Overall Viability

This criterion includes assessment of the organization's overall financial health as well as the financial and practical success of the relevant business unit. Gartner also considers the vendor's likelihood of advancing the state of the art for DXPs within the organization's product portfolio. Assessments of the organization's cash and equity position, management, and financial strategy are made.

Sales Execution/Pricing

This criterion relates to the organization's capabilities in all presales activities and the structure that supports them. Included are deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. Assessments of the quality of the vendor's sales force, the sales force's alignment with the DXP strategy, demonstrated market share, and the simplicity and predictability of pricing schemes are also included.

Market Responsiveness and Track Record

This criterion concerns the vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. It also considers the vendor's history of responsiveness to changing market demands. In addition, it considers the range and level of success among enterprise customers using the vendor's DXP offering.

Marketing Execution

This criterion assesses the clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand, increase awareness of products, and establish a positive identification in the minds of customers. This "mind share" can be created by a combination of publicity, promotional activity, thought leadership, social media use, referrals and sales activities. A clear understanding by existing and prospective customers of existing offerings and their development trajectory signifies successful marketing execution.

Customer Experience

This criterion concerns products, services and/or programs that enable customers to achieve anticipated results with the products evaluated. The assessment covers the quality of supplier/buyer interactions, technical support and account support. Other aspects assessed include ancillary tools, documentation, customer support programs, availability of support communities, and service-level agreements.

Operations

This criterion assesses the ability of the organization to meet its goals and commitments, as gauged by the quality of its organizational structure, skills, experiences, programs, systems and other vehicles that enable it to operate effectively and efficiently.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (January 2018)

Completeness of Vision

Vendors that understand their customers' evolving needs, incorporate new customer demands into their product strategies and exhibit technological innovation in their products exhibit Completeness of Vision in the DXP market.

Market Understanding

This criterion assesses the vendor's ability to understand and anticipate customer needs and translate them into products and services. Vendors with a clear vision for the market listen, understand customers' demands, and can shape or enhance market changes with their vision.

Vendors with the highest degree of DXP vision listen and respond to buyers' demands, anticipate emerging needs, and respond with an understanding of business demands, ecosystem and competitive landscape.

Marketing Strategy

This criterion looks for clear, differentiated messaging that is communicated consistently internally, externalized through social media, advertising, customer programs and positioning statements.

An effective marketing strategy is crucial to articulate the distinction between DXP offerings and outmoded legacy approaches to building and managing experiences specific to web and mobile presences.

Sales Strategy

This criterion looks for a sound strategy for selling that uses appropriate networks, including direct and indirect sales, marketing, service and communication networks. It also assesses partners that extend the scope and depth of the vendor's market reach, expertise, technologies, services and customer base.

In situations where the vendor offers multiple products geared toward DXP initiatives, it is essential to avoid channel conflict.

Offering (Product) Strategy

This criterion looks for an approach to product development and delivery that emphasizes market differentiation, functionality, methodology, and features as they map to current and future requirements.

The DXP market favors offerings that are comprehensive, integrated and rationalized, yet interoperable. Product and solution packaging are important considerations.

Business Model

This criterion assesses the design, logic and execution of the organization's business proposition. The business model should be strategically aligned with the motivations and initiatives of existing and prospective DXP customers.

Vertical/Industry Strategy

This criterion assesses the vendor's strategy for directing resources (sales, product and development), skills and products to meet the specific needs of individual market segments, including industries. Vendors must demonstrate versatility by means of capabilities and expertise in various industries.

Innovation

This criterion looks for direct, related, complementary, and synergistic layouts of resources, expertise or capital for investment, consolidation and defensive or pre-emptive purposes.

DXPs enable and exploit innovation in modern architecture, analytics, machine learning, knowledge graphs, context awareness, the IoT and user experience design to offer differentiated, continuous and engaging digital experiences.

Geographic Strategy

This criterion assesses the vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies other than its "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for the geography and market.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (January 2018)

Quadrant Descriptions

Leaders

Leaders have ample ability to support a variety of DXP use cases and consistently meet customers' needs over substantial periods. Leaders have delivered significant product innovation in pursuit of DXP requirements, and have been successful in selling to new customers across industries.

Challengers

Challengers demonstrate significant Ability to Execute, with strong businesses and customer bases and products that suit current demands. However, they lack the vision of Leaders and Visionaries, and may therefore struggle to fully satisfy future demands from a technology or business perspective.

Visionaries

Visionaries demonstrate a firm grasp of emerging customer needs and the potential impact of new technology.

Niche Players

Niche Players focus on limited DXP deployment scenarios, have limited geographic presence outside their home market, and/or focus on a narrow set of industries.

Context

This Magic Quadrant evaluates vendors that met Gartner's inclusion criteria for the DXP market. It is intended to facilitate selection decisions about vendors and products. Leaders of digital experience projects and initiatives should study the vendor evaluation criteria for Ability to Execute and Completeness of Vision, and weigh the associated Strengths and Cautions. They should consider vendors in any of the four quadrants, depending on vendors' alignment with their requirements and goals.

DXPs are emerging as centers of gravity in a complex, extensive and interconnected software landscape. They have a common goal: to improve user engagement across digital channels.

DXP vendors are responding to customer demand for systems that address digital business initiatives, rather than just one-off tactical websites and portals.

DXP capability is critical for ensuring secure, contextualized access and interaction across digital channels.

Vendors' footprints vary, and no vendor has everything. But the best vendors are able to establish their systems as centers on which organizations can extend, build or integrate other systems, as necessary, to accomplish their DXP goals.

Product integrity is a differentiator in the DXP market. Vendors are at various stages in the assembly, rationalization and unification of DXP offerings as the market matures from a demand perspective.

Recommendations:

- Exploit the full complement of DXP capabilities, including context awareness, personalization, content management, analytics and optimization, to improve user engagement and satisfaction across digital channels.
- DXPs are designed to support complex, multifaceted digital presences. Therefore, avoid using them for simple initiatives (such as a single website for a single audience), unless these form the initial phase of a long-term multichannel, multiaudience strategy.
- Use DXPs to empower business users, such as digital marketers, customer service leaders and corporate communications personnel, to assemble and manage digital experiences in their business's interests. IT organizations that fail to "hand over the keys" will be unable to meet business demand.
- Expand teams with content, design, analytics, records management and other expertise. A DXP's broad functional range calls for a broad range of skills.
- Anticipate vendor innovations to link DXPs with the IoT. In this highly competitive arena, look for vendors willing to engage with your organization to craft scalable solutions.

Market Overview

The DXP market has arisen as a result of the progress of digital business transformation and growing frustration with the confusing array of products required to create, manage and improve a strategically important digital presence.

On a technical level, DXPs stem from the evolution of established web foundations, primarily portal platforms and WCM systems, as they converge to address the "digital experience," wherein:

- *Digital* signifies a transformation from systems dedicated to the traditional web to systems that support many points of interaction, including mobile experiences, conversational interfaces and embedded interactions enabled by the IoT.
- *Experience* signifies a transformation from systems that deliver only content and information to those that also deliver actions, timely intelligence, advice and connections with other people, along with a design that promises to serve, delight and influence users.

Creating, managing and optimizing digital experiences requires platforms that combine and rationalize horizontal portal capabilities, WCM, and an array of complementary integration, analytics, social, search, and other functions. But a DXP must be more than the sum of its parts.

Some key trends in the DXP market:

- Demand for engaging and productive digital experiences will increase end-user spending on DXPs at a compound annual rate of 14% over the period 2016 to 2021, to reach $18.4 billion in 2021.
- Most organizations focus their initial DXP investments on marketing-centric customer experience efforts. This is because of the clear benefits of customer engagement, the increased influence of digital marketing leaders in digital business, the highly competitive nature of customer-facing initiatives, and a relatively straightforward value proposition.
- DXP vendors with WCM roots have asserted early leadership by winning many deals in competition with vendors with backgrounds in portal, commerce and other platforms. WCM leaders have successfully appealed to business influencers by applying emerging technology relatively quickly. The role of more complex foundations, such as horizontal portals, is often only well-understood by IT departments.
- The DXP market's focus is already shifting to the broader customer, partner and employee experience. DXP vendors that attempt to establish their offerings as the sole source of content and interaction struggle to support the interoperability and personalized access requirements of broader DXP initiatives.
- The digital workplace is a growing "hot spot" for DXP investment as organizations look to redefine the employee experience and renovate internal portals and intranets. Many organizations are adapting technologies, practices and skills from their customer-facing efforts to serve employees as if they were customers, which is leading many organizations toward a common platform.
- As in other markets, AI and machine learning are sources of innovation and inspiration. Organizations will increasingly use AI to address problems with established portal and WCM platforms, such as with the generation of content. AI will enable the creation of personalized contextual experiences without manual rules, offer recommendations and guidance, and enable new means of interaction, such as via chat bots.
- Voice interfaces, chat bots and personal digital assistants represent new ways to engage and support DXP audiences. In addition, organizations are increasingly employing IoT technologies and devices to provide embedded, ambient and continuous experiences.

Note 1
Definition of Headless Content Management

Headless content management (also known as "content as a service") focuses on the content management back end. It provides fundamental repository and library services to ensure the quality and integrity of content. This leaves content delivery and rendering to other mechanisms, such as a smart client using a JavaScript framework running in a browser. A headless content management system provides content services via APIs (often using JSON or REST), and the JavaScript framework does the "heavy lifting" of the digital experience. This decoupling of content services from the experience layer enables developers to build unique user experiences across digital channels and devices.

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.