Magic Quadrant for Digital Experience Platforms

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The digital experience platform market is still evolving and relatively immature, meaning much variation in definitions, types of offerings and vendor approaches. This Magic Quadrant will help application leaders responsible for digital and customer experiences find vendors suitable for their needs.

Strategic Planning Assumptions

Through 2021, 85% of effort and cost in a DXP program will be spent on integrations with internal and external systems, including the DXP’s own, built-in capabilities.

By 2021, 90% of global organizations will rely on system integrators (SIs), agencies and channel partners to design, build and implement their digital experience strategies.

Market Definition/Description

A digital experience platform (DXP) is an integrated set of core technologies that support the composition, management, delivery and optimization of contextualized digital experiences. DXPs entail a high degree of emphasis on interoperability and cross-channel continuity across the entire customer journey.

DXPs act as centers of gravity in a complex, extensive and interconnected technology landscape. Beyond simple websites and mobile apps, organizations need to deliver highly contextualized experiences to an increasing variety of modalities and channels across the customer journey.

“Customers” are broadly defined as consumers, partners, employees, citizens, suppliers and so on. DXPs support multiple use cases, such as business-to-business (B2B), business-to-consumer (B2C) and business-to-employee (B2E).

DXP capabilities include experience composition and orchestration, management and delivery, complemented by analytics and customer data management. Many DXPs also incorporate artificial intelligence (AI) and machine learning (ML) into their products. Multichannel support remains critical across all channels, both mainstream (web, mobile web) and emerging (IoT, VR/AR, wearables, conversational interfaces, etc.).

DXP capabilities can be broadly defined in the following three main sections of the functional criteria for this market:
1. Customer experience:
- Content interaction
- Search, navigation and discovery
- Collaboration and knowledge management
- Experience customization
- Digital commerce

2. DXP management:
- Content management
- Integration and aggregation
- Personalization and targeting
- Analytics and optimization
- Security administration
- Workflow/business process management
- Development

3. Platform/architecture:
- Multichannel delivery and presentation
- Customer data management
- Cloud enablement
- Globalization/localization/multilingual support

Many DXP offerings derive from portals and web content management (WCM) systems. The industry’s evolution is driven by the criticality of interoperability and integrations with adjacent technologies to support various parts of the customer experience (CX) strategy.

**Magic Quadrant**

*Figure 1. Magic Quadrant for Digital Experience Platforms*
Vendor Strengths and Cautions

Acquia

Strengths

- Acquia Experience Cloud offers a wide array of capabilities well-suited to support the B2C use case. Some clients also use it for B2B and B2E use cases.

- The open-source community behind Acquia, which is the main contributor to the underlying Drupal WCM system, is highly active and well-supported by the vendor.

- Acquia’s partner ecosystem continues to grow, offering choices to clients looking for expertise in specific verticals and availability in specific regions.
Cautions

- Prospects and existing customers in renewal phases find Acquia’s pricing and packaging confusing, and its contracts hard to navigate. The variety of metrics, product names and capacities can confuse some clients. Reference customers cited comparatively high pricing as reason to explore cloud hosting options outside of Acquia.

- Acquia’s DXP-related marketing strategy and execution is lagging compared to the competition, as the vendor is trying to establish its value-added differentiators from the open-source Drupal WCM foundation.

- With a broad range of add-on modules, Acquia’s product portfolio is comparatively difficult to navigate and view as a unified platform. This results in technical complexity and a need for deeper integrations.

Adobe

Strengths

- Adobe Experience Cloud provides a broad set of tools for digital experience management. These include content management, personalization, analytics, and AI and ML.

- Adobe demonstrates a focused strategy for supporting digital-experience-driven businesses, complemented by a comparatively large partner ecosystem.

- Adobe’s initiatives to standardize its own customer data have been demonstrated in its Data Science Workspace and Experience System of Record programs. The vendor also joined forces with SAP and Microsoft in the Open Data Initiative, which aims to deliver on a unified customer profile for enabling CX management.

Cautions

- Adobe’s DXP is a complex suite play, requiring multiple products from Experience Cloud to be successful. Some organizations are challenged by these complexities, which span from complex integrations to a high cost of ownership and steep learning curve.

- Adobe has been building its portfolio primarily via acquisitions. Some of the products and components within Experience Cloud are still not adequately integrated. Some customers have needed unplanned extra budget and resourcing to accomplish the integrations on their own.

- Adobe’s focus on B2C scenarios with highly sophisticated digital marketing requirements makes it an overbuy for less-complex B2C scenarios. The vendor is less-suited for B2B and B2E use cases, although its ability to support B2B may change with its recent acquisition of Marketo.

BloomReach
Strengths

- BloomReach Experience delivers a faster time to market and ease of implementation relative to the other vendors in this Magic Quadrant, especially in more straightforward B2C use cases.

- BloomReach is in the process of expanding its existing Hippo user community, active in Western Europe, with North America-based search and merchandising customers.

- BloomReach's flexible and versatile architecture allows it to respond quicker to market demands than some of its competition. Most recent examples of this include headless experience delivery via content as a service (CaaS) and single-page applications (SPAs).

Cautions

- Netherlands-based Hippo held some industry recognition when BloomReach acquired it in 2016, but overall BloomReach brand awareness is low across the globe — specifically outside Western Europe and even just the Netherlands in particular. The vendor rarely appears on shortlists in inquiries with Gartner clients.

- The already complex SaaS-based technology landscape of BloomReach products is exacerbated by legacy Hippo’s IaaS and custom-coded components. Integration between the two into a cohesive DXP is still underway, with the biggest gaps in AI/ML-driven personalization as well as cloud capability and UIs. The new PaaS-based BloomReach Cloud was released in November 2018, but its adoption and success remain to be seen.

- BloomReach suffers from a limited channel partner ecosystem. With the vendor’s professional services team being thin, customers must rely on system integrators (SIs) to implement its solution. The SI ecosystem is sparse, particularly outside of Western Europe.

CoreMedia

Strengths

- Nontechnical users appreciate the comparatively clean and intuitive UI of CoreMedia Content Cloud, which combines a variety of features spanning a wide range of B2C use cases.

- CoreMedia is in the process of strategically shifting from a classic WCM paired with commerce integrations into a more holistic DXP vision. Its shift to CoreMedia Content Cloud indicates growing product maturity and market understanding.

- CoreMedia’s Integration Hub offers a range of prebuilt connectors to common adjacent technologies. These include digital commerce systems from Salesforce, IBM and SAP.

Cautions

- CoreMedia has a relatively narrow vertical focus that may alienate some potential customers. Recently, the vendor has shifted away from its historic and proven focus on the media and...
telecom verticals to target the narrower vertical of commerce-driven luxury retailers. This may affect your ability to find customer examples and best practices for your industry.

- CoreMedia suffers from a very limited vendor presence and partner ecosystem outside of Europe. Gartner clients beyond the vicinity of the vendor’s home base in Germany rarely consider it on shortlists.

- CoreMedia’s cloud capability is comparatively nascent, with the vendor only recently introducing a cloud-subscription-based model for new customers only. Existing customers, which are mainly on-premises, still await migration and transition to the cloud.

**Crownpeak**

**Strengths**

- Crownpeak provides capabilities for governance, quality management and compliance that it added via acquisitions. The value of these capabilities is especially applicable to those in highly regulated industries.

- Crownpeak is one of the few true SaaS vendors in the DXP market. Its reference customers cited ease of onboarding and comparative ease of implementation as the benefits of its multitenant solution.

- Crownpeak’s reference customers cited comparative ease of use and usability for nontechnical, business users.

**Cautions**

- Crownpeak lacks a holistic multichannel strategy and readily available capabilities to deliver experiences to emerging channels, such as chatbots, digital assistants and in-location screens.

- Some APIs and integrations with best-of-breed, adjacent systems are limited in scope. Crownpeak prospects need to carefully evaluate these to ensure fit for their requirements and to establish the level of effort needed.

- Crownpeak is going through a significant amount of internal organizational changes and restructuring of the executive suite across a variety of roles. This may have unpredictable impact on its product roadmap and strategy in the near future.

**Episerver**

**Strengths**

- Given that it has grown by acquisition, Episerver Digital Experience Cloud has a well-integrated, modular and comprehensive set of capabilities. It’s well-suited for more advanced digital experience scenarios in B2C — and to some degree B2B — use cases that have requirements for personalization and commerce.
- Although Episerver is most often used end to end, it can be deployed in a headless fashion, allowing flexibility in the choice of front-end frameworks. It can also act as “head-optional,” with full APIs that work with custom front ends such as SPAs and progressive web applications (PWAs).

- With its European origin, Episerver is well-suited for multiregional, multisite and multilingual implementations.

Cautions

- Lack of marketing execution and brand awareness mean that Gartner rarely sees Episerver in prospect shortlists outside of its historical midsize target audience.

- Though some Episerver customers use its technology for intranets, it lacks advanced support for employee experience scenarios that require collaboration, knowledge management and role-based access.

- Episerver is going through a transition from on-premises and cloud-based, hybrid PaaS/SaaS architecture to a full SaaS product. Customers may experience some growing pains as the vendor works through this complex architectural transition.

IBM

Strengths

- IBM’s DXP offering, which is a combination of IBM Digital Experience Manager (which includes WebSphere Portal and Web Content Manager) and Watson Content Hub, is comprehensive and innovative due to the vendor’s focus on AI, cloud capabilities, the UX/UI and multichannel deployments.

- IBM’s cloud-based components are reliable and scalable.

- IBM puts its AI/ML in Watson Content Hub to practical use for features such as content composition, automated personalization and autotagging.

Cautions

- IBM is to divest WebSphere Portal and Web Content Manager to HCL Technologies, in a deal announced after the cutoff date for this research. While not affecting this current evaluation, such a move introduces uncertainty to IBM’s digital experience strategy as well as to existing customers and prospects.

- IBM’s expansive product portfolio as well as complex architecture and infrastructure can lead to feature bloat and implementation complexity. This may result in delayed time to market as well as higher maintenance and integration costs compared to the competition.

- IBM’s migration to the cloud is still a work in progress. The existing installed base is primarily on-premises, while new customers are started directly with the cloud version. Operating in
this hybrid fashion may stretch the vendor’s product management and development resources.

Kentico Software

Strengths

- Kentico Software continues to expand geographically from its European roots. It is boosting its partner network that previously had suffered from low levels of customer satisfaction. It offers expert certifications in several global locations to ensure quality control for project implementations.

- Kentico has launched a customizable data protection app that enables compliance with data protection regulations. It can cover, for example, some requirements for GDPR and personally identifiable information, such as consent tracking and opt-out.

- Kentico Enterprise Marketing Solution (EMS), the vendor’s prepackaged solution for digital marketing, commerce and intranets, appeals to midsize organizations that focus on a shorter time to market and lower solution costs.

Cautions

- Kentico’s reference customers raised concerns about the vendor’s integration, interoperability and aggregation capabilities.

- Kentico appeals to organizations with lower levels of digital maturity that have basic expectations. Kentico EMS is less appropriate for digitally mature organizations requiring advanced AI and ML functionality, personalization or marketing automation.

- Kentico’s reference customers reported that the rigidity of and architectural changes to EMS have caused challenges in upgrades, as well as technical and functional issues in production.

Liferay

Strengths

- Liferay’s reference customers appreciate that Liferay DXP’s architectural flexibility allows them to build customized experiences by incorporating external business applications and API-driven development approaches.

- Customers benefit from Liferay’s active open-source community, which continuously contributes product improvements and implementation ideas for a variety of use cases to the vendor’s application marketplace.

- Technologists in organizations that truly exploit Liferay highly rate its user communities and technical support.

Cautions
Liferay DXP Cloud, a PaaS offering currently available on AWS only, is very new and unproven. Prospects should evaluate it carefully in terms of reliability, availability and scalability, as well as its upgrade path.

Liferay’s WCM capabilities are not as sophisticated as those of the competition, making Liferay less suitable for B2C-focused scenarios that typically require extensive content management capabilities. Organizations with experience of best-of-breed WCM applications expect functionality that is easier to use and designed for business users.

Liferay is lacking in some DXP capabilities, such as AI/ML, customer data management, packaged headless/hybrid and holistic multichannel support. This may decrease the vendor’s appeal for more digitally mature or innovative organizations.

Microsoft

Strengths

Microsoft SharePoint and Office 365 within Microsoft Cloud continues to be one of the most popular technology choices for digital workplace scenarios and B2E use cases.

Microsoft Teams in Office 365, along with Graph, represents a paradigm shift in collaborative workstream capabilities. The combination adds multichannel continuous presence and pervasive, contextualized employee experiences.

Microsoft customers benefit from an extensive, global ecosystem of channel partners, SIs and third-party software providers.

Cautions

Microsoft’s DXP bundle — Microsoft Cloud, SharePoint, Office 365 and Dynamics 365 portals capabilities — is not as cohesive a DXP offering as the competition. With a particular weakness in external-facing B2C use cases, its functionality gaps include content presentation flexibility, content composition, content targeting and personalization, and multichannel delivery in Dynamics 365 portals and SharePoint.

Microsoft reference customers using the legacy on-premises SharePoint Server reported apprehension at the prospect of migrating off the platform or upgrading, due to substantial customizations and suboptimal customer experience.

Microsoft Azure-based native development and experience building capabilities for external-facing scenarios, in many cases, rely on third-party technology integrations and partner/SI support. Customers seeking a unified DXP platform that supports all use cases may find themselves building and assembling capabilities required for external-facing use cases.

OpenText

Strengths
OpenText offers the functional breadth of capabilities required to address digital experiences targeted at consumers, partners, employees and process-oriented scenarios.

OpenText TeamSite, the integral and comprehensive component of the vendor’s DXP solution, is well-established in the WCM market.

OpenText’s Media Management digital asset management (DAM) product adds value to customers that have complex rich media and digital asset requirements.

Cautions

- OpenText’s many acquisitions render its product roadmap uncertain, with limited interoperability among the varying levels in the product and across the vendor’s larger product portfolio.

- OpenText is notably absent from Gartner client shortlists, except where there’s an existing strategic investment or a need for replatforming.

- OpenText reference customers stated that the vendor’s DXP technology is sophisticated but complex. Some of these customers enlisted the vendor’s professional services and/or an implementation partner to do their implementation and/or upgrade(s).

Oracle

Strengths

- Oracle’s global presence, range of products and breadth of vertical solutions appeal to organizations looking for a single-vendor investment and a “suite of products” approach.

- Oracle’s DXP strategy is becoming more coherent. Oracle Content and Experience Cloud (CEC) offers a range of “clouds” and modules for multiple facets of a DXP solution. These include workflow (Process Cloud Service), testing and optimization (Maxymiser), analytics (Infinity), identity and security management, and integrations (Integration Cloud).

- Responding to the market demands to be cloud-first, Oracle is rebuilding many of its products to be cloud-native, including WebCenter Sites and WebCenter Portal. This should provide more scalability and reliability benefits to customers.

Cautions

- Responding to customer demands to provide more front-end flexibility by means of headless/head-optional/CaaS functionality, Oracle has started building out ReactJS capabilities. This development is still new and currently requires customers to manually build their own front ends from a command line tool.

- Oracle’s pricing is one of the most complicated in the market, with a multitude of tiers and metrics such as “active user per hour.” Oracle customers cite confusion with pricing,
challenges with lack of modularity, and limited ability to grow at their own pace without being charged overages.

- Although the brand-new cloud console is a compelling interface to unifying many Oracle DXP toolsets, it lacks some expected, productized integrations within its own suite, including digital commerce. Reference customers also cited complexity in integrations with outside technologies.

**Salesforce**

**Strengths**

- Community Cloud and Lightning Platform are the core of Salesforce’s DXP strategy. This combination is quickly becoming the primary experience technology for the vendor’s broad portfolio of “clouds,” and more multicloud Salesforce customers are starting to use it.

- Salesforce has filled its long-standing functionality gap with a brand-new WCM capability. The CMS Connect feature for integration with third-party WCM tools is still available as well.

- Salesforce offers several practical implementations of its Einstein-branded AI capabilities, including image analysis and recommendations.

**Cautions**

- Salesforce demonstrates weaker focus on a holistic DXP strategy compared to some of its competition. This includes nonexistent DXP messaging and marketing. Buyers looking to buy a DXP from Salesforce must thoroughly investigate the vendor’s commitment to DXP as opposed to traditional CRM.

- Community Cloud’s native WCM capability, which long remained a considerable feature gap for Salesforce, is brand-new and mostly unproven.

- Salesforce is primarily focused on B2B and B2C use cases, and less suitable for B2E/employee experience scenarios.

**SAP**

**Strengths**

- SAP’s strong geographical presence, extensive partner network and partner-packaged solutions in the SAP App Center are appreciated by SAP’s large installed base.

- SAP’s AI Leonardo framework offers ML capabilities that can be used in practical scenarios such as customer segmentation and the creation and delivery of compelling designs.

- SAP Cloud Platform is compatible with multiple clouds, including AWS, Microsoft Azure and Google Cloud in an IaaS fashion.
Cautions

- SAP's DXP offering, centered on SAP Cloud Platform Experience Maker, is not as cohesive as its competition. With the vendor's product strategy and marketing messaging emphasizing CX and the Intelligent Enterprise, its DXP vision is unclear to some customers and prospects.

- With many ancillary products in SAP Cloud Platform Experience Maker, SAP C/4HANA and SAP SuccessFactors, a complete solution stack may look complex. This makes SAP best-suited for existing, end-to-end customers with complex use cases.

- One of SAP's weaker capabilities in terms of digital experience composition and management is WCM. The vendor is trying to address this in some fashion with Experience Maker and third-party integrations, primarily to document management products for B2C scenarios.

SDL

Strengths

- SDL Tridion DX offers DITA-based structured content management via SDL Tridion Docs, web experience management with SDL Tridion Sites, and translation management capabilities via SDL Language Services. This combination is unique for the market, adding distinct differentiators for organizations looking for multilingual, multisite scenarios.

- SDL is making early stage investment in linguistics-driven AI based on natural language processing (NLP), generation (NLG) and understanding (NLU). This development should pair nicely with content management capabilities such as editorial support through AI prescriptive guidance.

- SDL's comparatively small but active developer community, especially in Europe, influences product roadmap and supports its partner ecosystem.

Cautions

- SDL's marketing strategy and product focus are too narrowly centered around web experience management. A more cohesive and comprehensive DXP picture would require more sophistication in personalization and multichannel capabilities beyond traditional websites.

- SDL rarely appears on DXP shortlists in Gartner inquiries. Customers often look at the vendor primarily in a WCM context, where there's a good functional fit from a multisite/multilingual perspective.

- From the implementation and partner channel perspectives, some SDL customers are experiencing increasing dependency on SIs that have rare, product-specific skills.

Sitecore

Strengths
Sitecore’s DXP is based on its heritage WCM as well as digital marketing and commerce capabilities. The vendor remains a popular option on shortlists in Gartner inquiries.

Sitecore’s multichannel strategy is supported by ongoing innovation in headless/head-optional approaches for experience delivery. Customers can utilize capabilities for ReactJS- and JavaScript-based front-end frameworks.

Sitecore has been investing in exploiting Microsoft-based, ML-driven personalization at scale. This is in addition to existing personalization capabilities in Sitecore Experience Database (xDB).

**Cautions**

- Some Sitecore customers have reported an accumulation of technical debt from each version upgrade. This requires additional investments in professional services or a partner.

- Sitecore’s belated cloud capability is still in active development and refinement stages. The vendor focuses solely on Microsoft Azure deployments, whereas many existing customers are operating their instances on AWS. This is driven by the vendor’s lack of cloud expertise and by inflexibility for cloud interoperability.

- Casual business users have cited difficulty in using Sitecore’s UI. They require more training than expected, which adds to the cost of the already premium-priced DXP offering.

**Squiz**

**Strengths**

- Squiz offers productized solutions for its target verticals, including government, utilities, publishing and higher education. Customers in these verticals benefit from well-rounded solutions for use cases such as digital workplaces and citizen/student portals.

- Squiz shows evidence of an advancing roadmap. Its latest product developments include Perspective aPaaS, graph search, a marketing dashboard and an internal marketplace for apps.

- Squiz reference customers reported lower total cost of ownership (TCO) and praised the agility and flexibility of the vendor. These are due to the low investment required (at least at entry levels), product modularity and new “drop-in apps” for third-party integrations.

**Cautions**

- The target industries of Squiz are limited to specific verticals, primarily government and education, meaning that prospects outside those verticals may need to look elsewhere or be prepared for unchartered waters.

- Squiz has a relatively limited global presence, operating primarily in Australia (from its HQ), with approximately a quarter of its staff in Europe and some presence in the U.S. The vendor
typically manages customer projects in Australia and Europe, but delegates that task to SIs and partners elsewhere.

- Squiz has a technical focus (e.g., on headless, PWAs), meaning that digital marketing, CX and digital experience are not its first priorities. Its rivals in the DXP space, especially for B2C and B2B, are likely to provide a better balance between IT and business-user priorities for most prospects.

Vendors Added and Dropped

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

Added
None

Dropped

censhare
GX Software
Jahia
Oxxyon

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 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 Criteria

Revenue and Market Criteria
- The DXP offering must have generated revenue of at least $10 million (U.S. dollars) in annual license and/or subscriptions in the four quarters to 30 June 2018. Revenue includes licenses and/or subscription services and maintenance. Professional service and infrastructure/hosting revenue is excluded.

- The vendor must have acquired at least five new customers over the four quarters to 30 June 2018.

- 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 must derive 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, and real estate.

- The vendor’s DXP marketing must target customers across at least three of the industries listed above.

**Ecosystem Activity and Market Interest**

- The vendor must have an active ecosystem, as evidenced by an assessment of the market, including factors such as community forums, books and seminars, as well as client, partner and channel activity (IT services firms, SIs, distributors, web interactive agencies and advisory firms).

- Market interest in the vendor is also considered, as evidenced by the level of interest shown by Gartner end-user clients (based on the number of inquiries to analysts via the Gartner call center or at Gartner conferences via one-on-ones, etc.).

**Customer Experience**

- We evaluate functions or services within production environments, including:
Marketing Execution

We evaluate the clarity, quality, creativity and efficacy of the vendor’s efforts to market its DXP offerings. We examine aspects such as thought leadership, word of mouth and sales activities.

Functional Criteria

Qualifying DXP offerings must be able to perform or support the following functions:

1. Customer experience:
   - Content interaction
   - Search, navigation and discovery
   - Collaboration and knowledge management
   - Experience customization
   - Digital commerce

2. DXP management:
   - Content management
   - Integration and aggregation
   - Personalization and targeting
   - Analytics and optimization

- Ease of deployment
- Operation
- Administration
- Stability
- Scalability
- Vendor support

We assess this criterion, where possible, through qualitative interviews with vendor-provided reference customers. We also use feedback from Gartner clients and others that use — or have completed competitive evaluations of — the DXP offering.
3. Platform/architecture:

- Multichannel delivery and presentation
- Customer data management
- Cloud enablement
- Globalization/localization/multilingual support

**Evaluation Criteria**

**Ability to Execute**

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

A vendor that may not be rated highly in terms of Ability to Execute in the 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. We also assess 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.

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. We consider the vendor’s history of responsiveness to changing market demands. We also assess the range and level of success among enterprise customers using the vendor’s DXP offering.

Marketing Execution

This criterion concerns 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 concerns 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

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product or Service</td>
<td>High</td>
</tr>
</tbody>
</table>
Source: Gartner (February 2019)

Completeness of Vision

Vendors that understand their customers’ evolving needs, incorporate new customer demands into their product strategies and exhibit technological innovation exhibit Completeness of Vision.

Market Understanding

This criterion concerns the vendor’s ability to understand and anticipate customer needs and to 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. They anticipate emerging needs and respond with an understanding of business demands, the ecosystem and the competitive landscape.

Marketing Strategy

As part of this criterion, we look for clear, differentiated messaging that is communicated consistently internally and 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

As part of this criterion, we look for a sound strategy for selling that uses appropriate networks, including direct and indirect sales, marketing, and service and communication networks. We
also assess 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

For this criterion, we look 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 concerns 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 concerns 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

As part of this criterion, we look 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, ML, knowledge graphs, context awareness and multichannel delivery.

Geographic Strategy

This criterion concerns the vendor’s strategy to direct resources, skills and offerings to meet the specific needs of geographies other than its “home” or native geography. We assess it either directly or through partners, channels and subsidiaries, as appropriate for the geography and market.

Table 2: Completeness of Vision Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Understanding</td>
<td>High</td>
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</table>
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 as well as 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 are forward-thinking, demonstrating a firm grasp of emerging customer needs and the potential impact of new technology. But they lack in some aspects of their offerings, service and support, and/or business and partner ecosystems, which affects their Ability to Execute.

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.

Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
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<tbody>
<tr>
<td>Marketing Strategy</td>
<td>High</td>
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<tr>
<td>Sales Strategy</td>
<td>Medium</td>
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<tr>
<td>Offering (Product) Strategy</td>
<td>High</td>
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<tr>
<td>Business Model</td>
<td>Medium</td>
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<tr>
<td>Vertical/Industry Strategy</td>
<td>Medium</td>
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<tr>
<td>Innovation</td>
<td>High</td>
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<tr>
<td>Geographic Strategy</td>
<td>Medium</td>
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Source: Gartner (February 2019)
IT leaders in charge of customer experience initiatives should:

■ Study the vendor evaluation criteria by which we determined each vendor’s Ability to Execute and Completeness of Vision.

■ Evaluate the vendors’ associated strengths and cautions.

■ Consider vendors in any of the four quadrants, focusing on those that align with their requirements and goals.

**Market Overview**

A digital experience platform (DXP) is an integrated set of core technologies that support the composition, management, delivery and optimization of contextualized digital experiences. DXPs entail a high degree of emphasis on interoperability and cross-channel continuity across the entire customer journey.

DXP capabilities include experience composition and orchestration, management and delivery, complemented by analytics and customer data management. Many DXPs also incorporate artificial intelligence (AI) and machine learning (ML) into their products. Multichannel support remains critical across all channels, both mainstream (web, mobile web) and emerging (IoT, VR/AR, wearables, conversational interfaces, etc.).

DXPs combine and coordinate applications, including content management, search and navigation, personalization, integration and aggregation, collaboration, workflow, analytics, and mobile and multichannel support, to:

■ Provide various types of customers with seamless, timely and continuous access to relevant information, interactions and applications.

■ Aggregate and coordinate disparate local and remote content, applications, and web, mobile, IoT and other 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.

This market is still immature, meaning considerable variation in definition ranges, types of offerings and vendor approaches to DXPs.

**Market Trends**

■ **High-velocity market dynamics.** Although growing rapidly, the DXP market is still emerging and far from maturity. This is reflected in varying levels of how the core technologies are integrated. It is also reflected in the different definitions vendors are using for the term “digital experience platform.” Another indicator is how coherently vendors present and execute on their product and marketing strategies.
The range of definitions used by vendors as to what they regard as critically important is a moving target, reflective of their respective strengths. Not all vendors fall in the range of what Gartner defines as a DXP. The offering from each vendor should be regarded in the context of the market definition described above.

Vendors’ footprints vary, and no vendor has every capability for every use case to the extent of buyers’ needs and expectations. But the best vendors can establish their systems as foundations. Organizations can extend those foundations and integrate other systems to accomplish their DX strategy and goals.

- **Disjointed buying behavior.** In DXP buying dynamics, we often see overlapping and conflicting priorities. It’s often not the same person buying a DXP and overseeing the overall CX strategy. Buying dynamics are often characterized by multiple departments buying DXPs concurrently or in succession.

DXPs are the key technological driver behind CX initiatives. Application leaders responsible for digital experience and CX are under pressure to provide an agile and scalable infrastructure. They also must empower their business partners to innovate faster.

A cloud-first and API-led approach prevails because it gives organizations the advantage of a faster pace of innovation, greater scalability and agility.

Buyers in this space need to maintain an incremental, iterative and experimental approach to their overall solution development. Some adopt the spirit and philosophy of agile continuous integration/continuous development (CI/CD). But first, buyers must have a clear “true north” perspective of what their solution landscape will eventually look like. That perspective must be organizationwide and centralized.

- **Divide between central platform versus suite of products.** There’s a definitive divide in the industry between a central platform and a suite of products approach:
  - **Platform vendors** — Try to offer a bundled vision supported by an integrated central platform. That sometimes means that the platform is stitched from many distinct “clouds.”
  - **Suite of products vendors** — Attempt to provide the best-of-breed approach. It can be based on multiple suites, clouds or products in a less-centralized and integrated fashion. In this case, there’s a core DXP but it requires external components to fulfill many use cases.

There’s a plethora of technologies adjacent to DXPs, including CRM, ERP, DAM, CCM, PIM and marketing automation. The emphasis should remain on interoperability and API-led integrations.

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 the demand and supply perspectives.
AI/ML is slowly making inroads. Despite AI/ML innovation, personalization, for example, is still too hard to do. Many organizations are still struggling with simpler, rule-based targeting. The current main applications of AI center around personalization or asset autotagging and metadata classification — especially for dynamic digital assets and rich media.

Application leaders responsible for digital experience and CX should expect and plan to include AI capabilities in organizational roadmaps. However, it’s wise to start with practical scenarios — those that can yield business results quickly and pose a low barrier to entry (see “Applying AI to WCM and DXP — Key Use Cases”).

**Acronym Key and Glossary Terms**

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<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
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<tbody>
<tr>
<td>AI</td>
<td>artificial intelligence</td>
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<td>B2E</td>
<td>business-to-employee</td>
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<td>CaaS</td>
<td>content as a service</td>
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<td>CCM</td>
<td>customer communications management</td>
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<td>CRM</td>
<td>customer relationship management</td>
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<td>DAM</td>
<td>digital asset management</td>
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<td>ERP</td>
<td>enterprise resource planning</td>
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<td>ML</td>
<td>machine learning</td>
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<td>PIM</td>
<td>product information management</td>
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<td>WCM</td>
<td>web content management</td>
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**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.