

Magic Quadrant for Digital Experience Platforms

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The digital experience platform market reflects the demand for platforms to ensure engagement of customers, partners and employees. Application leaders should use this Magic Quadrant to identify vendors that meet their needs across web, mobile and emerging digital channels and modes of interaction.

Market Definition/Description

A digital experience platform (DXP) is a well-integrated and cohesive set of technologies designed to enable the composition, management, delivery and optimization of contextualized digital experiences across multiexperience customer journeys.

A DXP can provide optimal digital experiences to a variety of constituents, including consumers, partners, employees, citizens and students, and help ensure continuity across the full customer lifetime journey. It provides the presentation orchestration that binds together capabilities from multiple applications to form seamless digital experiences.

A DXP forms part of a digital business ecosystem via API-based integrations with adjacent technologies. DXPs are applicable to business-to-consumer (B2C), business-to-business (B2B) and business-to-employee (B2E) use cases.

The core capabilities – provided either natively or through an integration – of a DXP include:

- Content management
- Account services
- Personalization and context awareness
- Analytics and optimization
- Customer journey mapping
- Customer data management
- Presentation, delivery and orchestration
- Search, navigation and insight

- Collaboration and knowledge sharing
- Security and access control
- Artificial intelligence (AI)
- Cloud capabilities
- Architecture and platform design
- Integration, interoperability and extensibility
- Multiexperience support

There are also optional capabilities, which are not required by Gartner's market definition. They include but are not limited to:

- Content services
- Low-code application development platforms
- Multiexperience development platforms
- Digital commerce
- Digital asset management (DAM)
- Marketing resource management
- Product information management
- Payment gateways
- Customer service
- CRM
- Customer communications management

Magic Quadrant

Figure 1: Magic Quadrant for Digital Experience Platforms





Source: Gartner (January 2021)

Vendor Strengths and Cautions

Acquia

Acquia is a Leader in this Magic Quadrant. Its DXP is the Acquia Open Digital Experience Platform, comprising Drupal Cloud and Marketing Cloud. This platform includes capabilities for content management, personalization and customer journey management. It is available as a platform as a service (PaaS), with some components available as software as a service (SaaS). Acquia is often deployed in financial services, manufacturing, and government verticals. It has offices in North America, Europe, Australia and India. Acquia is best suited to B2C and B2B use cases.

Strengths

- Acquia demonstrates an accurate understanding of the DXP market. This is backed by a vision for an “Open DXP” and a roadmap that closely reflects buyer demands.
- The Drupal open-source community of contributors is extensive and vibrant. Acquia’s symbiotic relationship with this community has helped increase recognition of its brand worldwide.

- Acquia has invested to deliver a more comprehensive DXP offering. Its acquisitions of Mautic, AgilOne and Cohesion, which give it digital marketing capabilities, a customer data platform (CDP) and a low-code site builder, respectively, reflect market demand.

Cautions

- Overlapping capabilities between Acquia's Drupal Cloud and Marketing Cloud have caused some confusion. Prospects need to assess carefully their requirements and determine how they map to Acquia's product portfolio and pricing.
- Acquia's personalization capabilities are not as advanced as those offered by some of its primary competitors. Prospects should inspect Acquia's roadmap and compare its capabilities with their requirements.
- Acquia's emphasis on being "open" contrasts with the relatively small number of technology partners in its ecosystem for which it offers advanced or productized integrations.

Adobe

Adobe is a Leader in this Magic Quadrant. Its DXP is called Adobe Experience Cloud, an offering available on-premises and as a PaaS, although some of its components are SaaS. The platform includes capabilities such as content management, analytics, personalization, customer data management and campaign management. Adobe is headquartered in San Jose, California, U.S. with presence worldwide. Its customers are in a variety of industries and of varying sizes. Adobe's primary use case is B2C, but some organizations also use it for certain B2B purposes.

Strengths

- Adobe's technology is widely adopted across the world and has high brand recognition. It is one of the most popular options on the shortlists of Gartner clients.
- Adobe offers differentiating customer data management capabilities for profile and identity management, as well as for real-time segmentation and data enrichment for enhanced personalization.
- Adobe has an extensive ecosystem that includes design and creative agencies, system integrators, and marketing and advertising agencies. This gives customers a wide choice of implementation and strategy partners.

Cautions

- The total cost of ownership (TCO) of Adobe's DXP is among the highest. Organizations evaluating Adobe must carefully negotiate contracts that are often complex, as well as plan a multiyear renewal strategy.
- The complexity of implementing and using Adobe's DXP remains challenging for customers. This complexity results in a steep learning curve, long implementation times, a continuous reliance on either Adobe or a partner, and additional cost.

- Adobe's support for the B2B use case remains limited, compared with that of other vendors in this Magic Quadrant. There are limitations to its capabilities for account services and for authenticated partner portals and experiences.

Bloomreach

Bloomreach is a Visionary in this Magic Quadrant. Its DXP is called Bloomreach Experience (brX). This platform provides capabilities such as content management, personalization, search and merchandising. It is available as a hybrid cloud solution, partly PaaS and partly SaaS. Bloomreach is headquartered in Mountain View, California, U.S., and Amsterdam, Netherlands, and also has a presence in Asia/Pacific. Bloomreach's DXP is most often used for B2C use cases in verticals such as retail and banking, but there is growing adoption for B2B use cases in manufacturing.

Strengths

- Bloomreach has advanced its "headless" support through a full GraphQL API, which reduces time to market.
- Bloomreach has a strong offering for search, product discovery and merchandising, supported by a unified data layer across the core data entities of products and customers, via an "intelligent index."
- Bloomreach has a strong focus on customer success. It offers best practices, customer enablement and thought leadership, especially for commerce-driven topics.

Cautions

- Bloomreach has a relatively narrow go-to-market strategy, with a focus on B2C and B2B commerce-driven use cases. Prospects should carefully evaluate Bloomreach's product strategy, product roadmap and ability to support use cases beyond commerce.
- Bloomreach's growth during 2020 was slower than Gartner expected, and Gartner clients' awareness of Bloomreach remains low, which indicates weak marketing execution. Prospects should carefully assess the regional availability of Bloomreach's offering.
- Bloomreach has a smaller partner ecosystem than most of the vendors in this Magic Quadrant, with few Tier 1 global service provider partners. Prospects aiming for a global rollout should check the availability of appropriate service providers for Bloomreach.

CoreMedia

CoreMedia is a Niche Player in this Magic Quadrant. Its DXP is called CoreMedia Content Cloud. It is available on-premises and as a vendor-managed PaaS that can also be self-managed or hosted by a partner. CoreMedia's clients use its DXP primarily for B2C and B2B use cases. CoreMedia is often deployed in verticals such as retail, telecommunications, manufacturing, financial services, and media and entertainment. CoreMedia is headquartered in Hamburg, Germany, and has a

presence in other parts of EMEA, as well as a more limited presence in Asia/Pacific and North America.

Strengths

- CoreMedia continues to develop its broad and deep ecosystem of technology alliances and integrations. Examples include integrations and partnerships with commercetools, Monetate, Salesforce (Salesforce Marketing Cloud), SAP (SAP Commerce Cloud) and Dynamic Yield.
- CoreMedia takes a modular approach to its DXP by offering pluggable components for content management, experience orchestration, DAM and personalization. Modularity typically offers faster time to market and architectural flexibility for buyers.
- OpenGate Capital's recent acquisition of a majority interest in CoreMedia should help CoreMedia expand its marketing efforts, partner ecosystem and product capabilities for a more well-rounded DXP.

Cautions

- CoreMedia is known mostly in Europe. It has fewer partners and system integrators outside that region, and is rarely shortlisted by Gartner clients. Prospects outside Europe should carefully assess the availability of support and access to a partner ecosystem and experienced resources.
- CoreMedia's product strategy tends to evolve relatively slowly and conservatively. This is especially the case with its approach to innovation, as compared with other vendors in this Magic Quadrant.
- CoreMedia's cloud strategy lags behind those of its competitors in this Magic Quadrant. As its DXP is not cloud-native and lacks maturity, compared with those of other vendors in this Magic Quadrant, customers may have to invest in additional cloud infrastructure and services.

Crownpeak

Crownpeak is a Niche Player in this Magic Quadrant. Its DXP is the Digital Experience Management (DXM) platform. Its capabilities include content management, presentation and orchestration, as well as adjacent capabilities for consent management, compliance, governance and security. It is most often deployed for B2C and some B2B use cases. Crownpeak is headquartered in Denver, Colorado, U.S., and has some presence in Europe. Crownpeak is often considered by organizations in financial services, consumer industries, and the pharmaceutical and healthcare sectors.

Strengths

- Crownpeak offers transparent and competitive pricing. The modular character of its pricing model attracts buyers and enables them to expand the solution at their own pace in terms of volume and complexity.

- Crownpeak offers a cloud-native multitenant SaaS DXP that often appeals to midsize organizations with few IT resources.
- Market feedback suggests that Crownpeak DXP's UI is generally regarded as intuitive and easy to use by business users.

Cautions

- Crownpeak natively covers a smaller part of the DXP technology landscape than some of the larger DXP vendors. This is particularly the case in areas such as AI, CDPs, customer journey mapping and analytics.
- Crownpeak's marketing effectiveness is relatively limited, compared with that of its main competitors in this Magic Quadrant. This could result in slower growth and a comparatively low level of investment in, and a relatively slow pace of development of, its DXP.
- Crownpeak's partner ecosystem is small in a market that relies heavily on such ecosystems for both business development and solution deployment. Prospects may find that resources to support implementation are scarce, as are technological alliances.

Episerver (Optimizely)

Episerver (Optimizely) is a Leader in this Magic Quadrant. Its DXP is the Episerver Customer-Centric Digital Experience Platform. Its capabilities include content management, personalization, customer data management and analytics. It is available in the cloud as PaaS primarily, although many of its components are SaaS. It is most often used in B2C and B2B use cases. Episerver (Optimizely) is headquartered in Nashua, New Hampshire, U.S. It also has presence across EMEA and parts of Asia/Pacific. Its DXP is often deployed in such verticals as retail, manufacturing and distribution, technology and financial services.

Episerver acquired Optimizely in October 2020. In early 2021, the vendor announced plans to rebrand from Episerver to Optimizely.

Strengths

- Episerver (Optimizely) has a good understanding of the DXP market. This understanding is supported by its product vision and acquisitions. Examples of its acquisitions are Idio for advanced personalization (now part of Episerver Intelligence Cloud) and Optimizely for targeting and multivariate testing.
- Episerver (Optimizely) has improved its overall marketing effectiveness with messaging and prescriptive guidance that resonates with the aspirations of its target audiences.
- Pricing and packaging are modular and highly transparent. This vendor's pricing strategy appeals to large enterprises and growing midsize organizations.

Cautions

- Episerver (Optimizely) is not often considered for B2B use cases, even when it could be a good choice. This is due to confusing product marketing and messaging.
- Employee experience and B2E use-case support are not this vendor's strongest areas. Prospects considering Episerver (Optimizely) for B2E context should examine carefully the additional capabilities they would require.
- Episerver (Optimizely) has changed ownership and leadership in the past few years. Prospects should carefully examine the vendor's long-term product direction and corporate strategy to allay any related concerns.

e-Spirit

e-Spirit is a new entrant to the Magic Quadrant, as a Niche Player. Its DXP is the FirstSpirit Digital Experience Platform. Its capabilities include content management, search, personalization and analytics. It is available as a cloud PaaS and on-premises. e-Spirit is headquartered in Dortmund, Germany and has offices in the U.S., the U.K. and Asia/Pacific. e-Spirit's DXP is used in B2C and B2B scenarios. It is often deployed in retail, manufacturing, banking and insurance verticals.

Strengths

- e-Spirit has a sound product strategy that is aligned accurately with the developments Gartner sees in the DXP market, such as strong cross-channel continuity and personalization.
- e-Spirit is regarded as offering an agile, architecturally flexible platform with shorter time to value and strong interoperability with adjacent technologies.
- e-Spirit's hybrid headless toolkit for building progressive web applications features content preview and WYSIWYG capabilities that improve usability for nontechnical business users.

Cautions

- e-Spirit has low brand recognition outside Europe. Gartner rarely sees it on clients' shortlists. Prospects should carefully assess the availability of support, a partner ecosystem and experienced resources in their regions.
- e-Spirit's focus on hybrid headless scenarios means that its front end and its presentation and orchestration layer may be less well-supported than those of other vendors in this Magic Quadrant. Additional investment is required.
- e-Spirit's execution of a cloud strategy has been slower than that of its competitors in this Magic Quadrant. Its PaaS-based offering has comparatively limited functionality and lacks maturity and customer adoption, with the majority of e-Spirit's customers still being on-premises or in a private cloud.

HCL Software

HCL Software, the software division of HCL Technologies, is a new entrant to this Magic Quadrant, as a Challenger. HCL's DXP is called HCL Digital Experience. HCL entered this market with the June 2019 acquisition of IBM's DXP business unit and its legacy on-premises DXP products called WebSphere Portal and Web Content Manager (earlier, in 2017, it had acquired IBM's Forms Experience Builder). These products comprised IBM Digital Experience Manager, IBM's DXP, at the time of acquisition. (IBM Watson Content Hub, which was also part of IBM's DXP portfolio, was acquired by Centerbridge Partners.) HCL focuses on content management, security and access controls, low-code application development and DAM capabilities. HCL offers its DXP primarily on-premises, although it is investing in moving it to the cloud. HCL is headquartered in Noida, India, and has global operations. Its DXP is deployed in government, life sciences, insurance, financial services and other verticals for B2C, B2E and B2B use cases.

Strengths

- HCL's historical strength in a wide range of consulting and professional services can be beneficial to its DXP customers. HCL can also rely on IBM's partner channel, which includes DXP specialists.
- HCL is equally good at addressing B2B, B2E and B2C use cases, given its capabilities for both external-facing and internal-facing digital experience scenarios.
- HCL has a good reputation when it comes to integration and extensibility, ability to customize its platform, and application development.

Cautions

- HCL inherited some technical debt from the 2019 IBM acquisition. It needs to make a substantial investment to modernize its DXP's codebase and features that have a "legacy" reputation.
- HCL's product direction focuses on only a subset of DXP capabilities, namely content management. It is struggling to execute a cloud strategy for a DXP that has a strongly on-premises background.
- Market feedback suggests that some business and marketing users regard HCL's user interface as difficult to use, unintuitive and less modern than the UIs of competitive products.

Kentico

Kentico is a Niche Player in this Magic Quadrant. Its DXP, called Kentico Xperience, includes nontypical functionality, such as for email marketing and digital commerce. It is available both on-premises and as PaaS in the cloud. Kentico is headquartered in Brno, Czech Republic and has a strong presence in North America. Its DXP is often deployed by organizations in government, education, retail, healthcare and manufacturing verticals. It is typically used by midsize organizations for B2C, B2B and B2E use cases.

Strengths

- Kentico has a strong brand in this market. Prospects, particularly in the midmarket, consider it an attractive alternative to the traditional DXP front-runners. Its messaging is pragmatic and resonates well with business decision makers.
- Kentico offers good value for money and a high degree of transparency about its overall pricing model.
- Deployment of Kentico Xperience is typically less complex than is the case with competitors' offerings. This can shorten the time to value for customers.

Cautions

- Kentico Xperience is an incremental evolution of Kentico's Enterprise Marketing Suite product, which the vendor has sold for many years. Kentico Xperience's capabilities therefore lag behind those of other vendors featured in this Magic Quadrant.
- Kentico's dual-product strategy includes a separate headless web content management (WCM) system, Kentico Kontent, that is not part of its DXP. Prospects need to understand that there is no simple upgrade path from Kentico Kontent to Kentico Xperience.
- Kentico Xperience's customer journey mapping and customer data management capabilities are minimal. Additionally, preintegrated connectors to common best-of-breed solutions are basic and require customization.

Liferay

Liferay is a Leader in this Magic Quadrant. Its DXP is Liferay DXP, which includes capabilities for experience management, content management, personalization and analytics. It is available on-premises and as a PaaS (Liferay DXP Cloud). Liferay is headquartered in Diamond Bar, California, U.S., and also has presence in Latin America, EMEA and Asia/Pacific. Its DXP is often deployed by organizations in the manufacturing, utilities and financial services sectors for B2B, B2C and B2E use cases.

Strengths

- Liferay has an extensive global user base of large and midsize organizations that rely on its platform for authenticated customer and partner portal use cases.
- Liferay targets enterprise IT buyers successfully. It provides a strong offering in terms of extensibility and application integration, as well as decoupled and headless presentation.
- Liferay's open-source basis offers value for money for a relatively low TCO, with enterprise licenses adding advanced features and support.

Cautions

- Liferay's cloud strategy largely stems from the customization paradigm for on-premises customers. Its DXP lacks a mature extensibility model to support optimal flexibility and

elasticity in cloud-based deployments.

- Market feedback suggests that Liferay's pricing and packaging is complex, monolithic and primarily aligned with the model of on-premises deployments. Prospects will need to carefully size their environments to understand the required number of instances.
- Liferay DXP is primarily used for authenticated B2B experiences. It lacks the sophisticated content management, personalization and digital marketing features required for advanced B2C scenarios.

Magnolia

Magnolia is a new entrant to this Magic Quadrant, as a Niche Player. Its DXP is Magnolia DX Core. Its capabilities include content management, personalization, search, campaign management and DAM. It is available on-premises (which includes deployment in a private cloud) or in the cloud as PaaS. Magnolia is headquartered in Basel, Switzerland, and has presence across North America, EMEA and parts of Asia/Pacific. It is often deployed by organizations in banking, manufacturing, communications, and travel and hospitality verticals for B2C, B2B and B2E use cases.

Strengths

- Magnolia provides a connector-rich framework and modular architecture. This enables incremental delivery and the ability to build digital experiences from best-of-breed components.
- Market feedback suggests that Magnolia typically presents a lower barrier to entry, especially with its open-source community edition as a starting point, and lower TCO.
- Magnolia's momentum is growing. This enables DXP buyers in new regions, such as Asia/Pacific, to consider it for their shortlists.

Cautions

- Magnolia enables its customers to build a DXP from first- and third-party capabilities (from analytics to personalization). This approach may be less attractive to prospects looking for a more packaged DXP solution.
- Magnolia's brand awareness outside Europe and parts of Asia/Pacific is low. Gartner rarely sees it on client shortlists. The availability of implementation partners mirrors this, and prospects might struggle to find a partner outside its core regions.
- Magnolia focuses on B2C and B2B use cases. Prospects should carefully evaluate its applicability to B2E use cases.

OpenText

OpenText is a Challenger in this Magic Quadrant. Its DXP is the OpenText Experience Platform, which is a broad suite with capabilities including content management, analytics, personalization and optimization, and DAM. It is available on-premises, and can be cloud-hosted (private or

public) as PaaS. OpenText is headquartered in Waterloo, Ontario, Canada, and has a global presence. OpenText is most often used for B2C and some B2B use cases in a variety of vertical markets, including manufacturing, government, retail, financial services and insurance.

Strengths

- OpenText Experience Platform is part of a wide customer experience portfolio of 32 OpenText products. These products can provide broad, flexible and deep functionality.
- OpenText supports integration via connectors with a very wide set of third-party applications. This is suited to complex organizations with complex content-oriented scenarios.
- OpenText's DXP portfolio includes strong capabilities for analytics and business intelligence, as well as AI via OpenText Magellan.

Cautions

- OpenText focuses on use cases with complex requirements in financial services, insurance, life sciences, utilities and the public sector. Prospects with less complexity or in other verticals should carefully evaluate its applicability to their scenarios.
- Many products in the OpenText Experience Platform portfolio are of precloud origin and vary in age and architecture. OpenText's cloud offering is young and growing. The TCO can be higher for services that may not yet be offered as standardized cloud packages.
- OpenText's DXP has grown by acquisition and can feel like a loosely integrated DXP framework of separate products. Considerable development and configuration are required to create a solution, making it more suitable for large IT teams or partners.

Oracle

Oracle is a Challenger in this Magic Quadrant. Its DXP is called Oracle Customer Experience (CX), which includes Oracle Content and Experience, Oracle CX Marketing and Oracle CX Service, among other products. It has capabilities such as content management, AI, analytics and security. Oracle CX is offered as a SaaS subscription that includes native PaaS services. Oracle is headquartered in Austin, Texas, U.S., and has a worldwide presence. Oracle's DXP is often deployed in financial services, retail, manufacturing and travel verticals, mainly for B2C and B2B use cases.

Strengths

- Oracle has a global presence and extensive partner ecosystem that should benefit its DXP customers from both a strategic and an implementation perspective.
- Oracle's DXP is differentiated by "pageless experiences." These are achieved by a combination of headless, hybrid-headless and native presentation layers.
- Oracle DXP's user interface for nontechnical users has improved to provide a user-friendly experience with easier access to a wide range of functionality.

Cautions

- Oracle's product portfolio is extensive and complex, with a focus on the end-to-end CX. Customers may need to invest in multiple components on top of the foundation of Content and Experience Cloud to address their DXP requirements. This could potentially result in an expensive investment.
- The general level of market awareness of Oracle's DXP is lower than that for most vendors in this Magic Quadrant. Gartner usually sees Oracle on DXP shortlists in Oracle-centric organizations.
- Market feedback suggests that Oracle's technical support can be hard to engage with and that its documentation is insufficient and difficult to navigate. This can result in poor customer experiences and a steep learning curve, as well as increased reliance on system integrators.

Salesforce

Salesforce is a Challenger in this Magic Quadrant. Salesforce's DXP is called Salesforce Experience Cloud (formerly known as Community Cloud), a SaaS product. It provides capabilities for content management, personalization, AI, CDPs and integrations. Salesforce is headquartered in San Francisco, California, U.S., and has a global presence. Salesforce serves multiple verticals, such as retail, manufacturing, healthcare and financial services. Salesforce's DXP is deployed primarily for B2B and B2C use cases.

Strengths

- The breadth of Salesforce's CRM capabilities is a competitive differentiator and adds value to its DXP.
- Salesforce has a strong focus on industry-specific solutions through its Vlocity acquisition, as well as specialized offerings for verticals such as financial services, manufacturing, and health and life sciences. They are available as Lightning Bolts built by partners.
- A single view of the customer available via integration with Salesforce's CDP (Customer 360 Audiences) provides sophisticated capabilities for segmentation and activation of customer data, and account services.

Cautions

- Salesforce's DXP is most often used in combination with other products from Salesforce's vast portfolio. This increases overall complexity and cost for the buyer.
- Salesforce CMS – the underlying content management layer in the DXP – continues to lack feature parity and maturity, in comparison with offerings from other vendors in this Magic Quadrant. It is not suited for use as a stand-alone CMS, but rather mostly as a CMS specifically built to work across the Salesforce portfolio.
- Salesforce's DXP is priced at the upper end of the market. This limits its appeal mainly to organizations that have already invested in other parts of the extensive Salesforce product

portfolio.

Sitecore

Sitecore is a Leader in this Magic Quadrant. Its DXP product is the Sitecore Experience Platform, which has capabilities such as content management, personalization and optimization. Sitecore's DXP is available as a PaaS, with a transition to SaaS planned for the next three to five years. Sitecore is headquartered in San Francisco, California, U.S. and has presence in EMEA and Asia/Pacific. Sitecore's DXP is most often deployed for B2C and some B2B use cases in the healthcare, retail, manufacturing and travel verticals.

Strengths

- Sitecore's DXP offers a broad set of digital experience capabilities for customer-experience-centric scenarios and B2C use cases. Organizations with sophisticated digital marketing requirements and a solid CX strategy often find it appealing.
- Sitecore has consistently proven its ability to understand market demands accurately. As a result, its messaging resonates strongly with business decision makers.
- Sitecore continues to expand its AI and machine learning capabilities, including those of Sitecore AI for autoperpersonalization and its processing engine, Sitecore Cortex, which includes automated optimization and content-tagging features.

Cautions

- Some Sitecore prospects and existing customers continue to voice concerns about its "monolithic" pricing proposals lacking the necessary granular detail. When prospects have requested such detail, the vendor has not always been forthcoming.
- Gartner has noticed a decrease in the frequency with which Sitecore has been included in selection shortlists. In some cases, the reason had to do with a lack of differentiated capabilities in more commoditized areas (such as WCM), compared with less expensive alternatives.
- Some Sitecore customers struggle with product complexities and have described multiple challenges in realizing the full potential of the software.

Squiz

Squiz is a Niche Player in this Magic Quadrant. Squiz DXP is available on-premises and as PaaS. It includes capabilities for content management, search, personalization and integration. The product is most often used by midsize organizations in the government and higher education verticals. Squiz is headquartered in Sydney, Australia, and has a smaller presence in North America and EMEA. It is used for all three use cases: B2C, B2E and B2B.

Strengths

- Squiz's DXP is a highly modular platform with distinct modules for content management, search and data management, among other things. This gives customers the flexibility to buy only relevant components.
- Squiz is investing in customer success by ensuring direct communication with customers and helping them derive value from the product, as well as allowing their input into the roadmap.
- Squiz's affordable and transparent pricing model presents a relatively low barrier to entry, along with a typically lower TCO.

Cautions

- Squiz is most often deployed by midsize organizations, specifically in the higher education and government sectors. Prospects in other verticals and large enterprises should carefully examine Squiz's roadmap to ensure alignment with their requirements and strategic objectives.
- Squiz's channel of implementation, technology and agency partners remains relatively thin outside Asia/Pacific. Prospects should ensure that skilled resources are available in their regions.
- The new Squiz Experience Cloud – a toolset for managing cloud infrastructure as SaaS – lacks customer adoption, maturity and global availability.

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.

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Added

- e-Spirit
- HCL Software
- Magnolia

Dropped

- SAP

Inclusion and Exclusion Criteria

Business Criteria

- **Revenue:** Each vendor's DXP offering must have generated revenue of at least \$17 million (U.S. dollars) with at least 5% year-over-year revenue growth in the rolling 12 months leading up to June 2020. Revenue included perpetual licenses and/or cloud subscription and maintenance revenue. Professional services, training, onboarding and infrastructure/hosting revenue was excluded. The vendor must have acquired at least 10 net new customers in the rolling 12 months leading up to June 2020.
- **Market presence:** Each vendor had to have been marketing and selling its DXP product since at least June 2019.
- **Geographic coverage:** Each vendor had to have a market presence in at least two of the following regions: North America, Latin America, Europe, Middle East and Africa, Asia/Pacific and Japan. Regional market presence is represented by dedicated offices and employees and/or partners in a region. At least 20% of a vendor's total revenue had to come from at least two of these regions.
- **Partner ecosystem:** Each vendor had to demonstrate the ability to deliver implementation support for customers via a certified partner ecosystem containing at least 10 implementation agencies and system integrators.
- **Vertical market coverage:** At least 20% of the vendor's revenue had to derive from organizations in at least three of the following vertical markets: banking and securities, communications, media and services, education, government, healthcare provision, insurance, manufacturing and natural resources, retail, transportation, utilities, wholesale trade. The vendor's DXP marketing had to target customers in at least three of these sectors.
- **Ecosystem activity and market interest:** Each vendor had to have an active ecosystem around its DXP, as evidenced by Gartner's assessment of the market, including factors such as community forums, books and seminars, as well as client, partner and channel activity (by IT services firms, system integrators, design agencies and advisory firms). Gartner also considered the degree of market interest in each vendor's DXP, as measured by the number of end-user clients' inquiries to Gartner analysts made via a Gartner call center or at Gartner events.
- **Go-to-market approach:** Each vendor's go-to-market approach had to demonstrate explicit mention of its DXP(s) in its go-to-market activities, such as positioning, marketing, messaging, and pricing and packaging for its DXP(s). We examined aspects such as thought leadership, product marketing and product management, public presentations, events, customer experience, digital presence, social media presence and sentiment, partner channel, word of mouth and sales strategy.

Product Criteria

- **Product packaging:** Each DXP's native product capabilities had to be available as a cohesive and integrated product, under one product name.
- **Use-case support:** Each DXP had to be able to support, as a cohesive and integrated product, at least two of the three use cases – namely B2C, B2B and B2E.
- **Product capabilities:** The DXP must have:

Natively:

- Content management capabilities for managing various content types, including (but not limited to) textual content, graphics and other rich media, web content, mobile app content, chatbot content and voice content.
- Rich, extensible, interoperable and well-documented production/consumption APIs.
- Support for multiexperience presentation, orchestration, and delivery and assembly of digital experiences via hybrid and/or headless capabilities.
- Cloud capabilities: Each DXP had to be available for cloud deployment as PaaS (with or without managed services) and/or SaaS.

Either natively or via integrations (including with OEMs):

- Account service capabilities, including registration, login and password management with authentication and access control.
- Customer data management capabilities.
- Customer journey mapping capabilities.
- Personalization, analytics and optimization capabilities.
- Practical applied AI capabilities.

Evaluation Criteria

Ability to Execute

Organizations evaluating DXPs have wide-ranging requirements, typically for multiple audiences. Broad functionality supporting different DXP deployment scenarios, long-term viability, a demonstrated track record of meeting customers' needs, and an expanding market presence are important aspects of Ability to Execute in this market.

Product or service: This criterion concerns core products that compete in the defined market. Included for consideration are current products, quality, feature sets, skills and so on. Products can be offered natively or through OEM agreements and partnerships. Product assessments

focus on essential DXP functionality, integration, 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 an assessment of a vendor's financial health and overall success, and product vision, together with the likelihood that it will continue to invest in its product. This criterion assesses a vendor's overall financial health, as well as the financial and practical success of the relevant business unit. Assessments are made of the organization's cash and equity position, growth in the market, management and financial strategy.

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

Market responsiveness/record: This criterion concerns a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customers' 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 of enterprise customers that use the vendor's DXP.

Marketing execution: This criterion assesses general awareness of the vendor in the market, and any negative or positive perceptions of the vendor. It examines the clarity and efficacy of the vendor's programs designed to convey DXP messaging in order to influence the market, promote a 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 the vendor's offerings and their development trajectory indicates successful marketing execution.

Customer experience: This criterion concerns products, services and/or programs that enable customers to achieve anticipated results with the product(s) evaluated. This criterion assesses customer satisfaction, the quality of supplier-buyer interactions, technical support and account support. Other aspects assessed include ancillary tools, documentation, customer support programs, customer success programs, availability of support communities and service-level agreements.

Operations: This criterion assesses a vendor's ability to meet its goals and commitments, as gauged by the quality of its organizational structure, skills, experiences, programs, systems, SLAs for cloud-based services and other vehicles that enable it to operate effectively and efficiently.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
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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 2021)

Completeness of Vision

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

Market understanding: This criterion assesses a vendor's demonstrated ability to understand and anticipate customers' needs and to translate them into products and services. Vendors with a clear vision for the market listen, understand customers' demands, and shape or enhance market changes using their vision. Vendors with the clearest DXP vision articulate their ambition, while also listening and responding to buyers' demands, anticipating emerging needs, and reacting with an understanding of business demands, ecosystems and the competitive landscape.

Marketing strategy: This criterion looks 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 differentiation from other DXP offerings and outmoded approaches to building and managing experiences specific to web and mobile presences.

Sales strategy: This criterion looks for a sound sales strategy based on a demonstrated sales methodology 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 a vendor's market reach, expertise, technologies, services and customer base. In situations

where a 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 meet our core platform criteria, are integrated and rationalized, yet provide easy integration and extension capabilities, and are thus interoperable. Product and solution packaging are important considerations.

Business model: This criterion examines product revenue growth and the ease of doing business with customers. We also look for a strong partner ecosystem that amplifies the vendor's go-to-market strategy. We also look at how the business model is aligned with business objectives and requirements of existing and prospective DXP customers.

Vertical/industry strategy: This criterion assesses a vendor's strategy for directing resources (for sales, products 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, as demonstrated via vertical strategies.

Innovation: This criterion looks for direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation and defensive or preemptive purposes. DXPs enable and exploit innovation in modern architecture, analytics, AI, knowledge graphs, context awareness, the Internet of Things, and user experience design to offer differentiated, continuous and engaging digital experiences.

Geographic strategy: This criterion assesses a vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies other than its "home" 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	High
Sales Strategy	Medium
Offering (Product) Strategy	High

Evaluation Criteria ↓	Weighting ↓
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (January 2021)

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 vendors that demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. But they are lacking in terms of some aspects of their offerings, service and support, and/or business and partner ecosystems, which impairs 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 aid selection decisions about vendors and products. Application leaders in charge

of digital workplace applications focused on digital experience and customer experience initiatives should:

- Study the evaluation criteria by which we determined each vendor's Ability to Execute and Completeness of Vision.
- Evaluate the vendors' Strengths and Cautions.
- Assess vendors in any of the four quadrants, with a focus on those that align with their requirements and goals.

The associated [Critical Capabilities for Digital Experience Platforms](#) aids vendor selection from a use-case and capability perspective. It should be used with this Magic Quadrant.

Market Overview

DXPs act as “centers of gravity” in complex, extensive and interconnected technology stacks to increase the impact of a digital presence. Organizations need a DXP to deliver highly contextualized experiences – not just simple websites and mobile apps – for an increasing variety of modalities and channels across customer journeys. In 2020, the market was influenced by these trends:

- **Pandemic-fueled rush to digital:** The COVID-19 pandemic elevated the importance and urgency of digital experience management and delivery, and reignited the importance of digital transformation. Application leaders in charge of digital experiences found themselves struggling with the usability, scalability and uptime of their DXP systems, given the spikes in traffic and growing demand for the digital channel.
- **Composable DXP.** Application leaders must modernize their technology stack approach in order to meet market demands. This means abandoning monolithic technologies that cannot meet market demands. To future-proof the stack, a composable DXP (see [Adopt a Composable DXP Strategy to Future-Proof Your Tech Stack](#)) must be adopted as a way to deliver composable user experiences front end as a service (FEaaS) and composable content. Many technology stacks currently in place were composed by organizations from a set of heavyweight monolithic applications covering a wide set of business needs, with low rates of change. Gartner expects that pressure from buying behaviors in this market will force vendors to increase the modularity of their offerings and the corresponding pricing, based on consumption-based models.
- **Continued divide between suite and platform approaches:** The market continues to see a substantial divide between all-in-suite and platform-oriented DXPs. This, in turn, results in a 50:50 split between “buy” decisions (for procurement of an entire DXP from one vendor) and “build” decisions (for procurement of best-of-breed DXP components from multiple vendors). The demand side is reluctant to buy the whole DXP set of capabilities at once, from one vendor,

in one suite. There is increasing pressure against the suite approach, in favor of a more incremental, best-of-breed approach with a focus on excelling in integrations.

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.

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