



# Magic Quadrant for Digital Experience Platforms

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The digital experience platform market reflects the demand for platforms to manage digital experiences of customers, partners and employees. Use this Magic Quadrant to identify vendors that meet your needs across web, portal, mobile and other digital channels.

## 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 of a DXP — provided either natively or through an integration — 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 and adjacent markets that are out of the scope for DXP, but often come up in use cases. These include (but are not limited to):

- Content services platforms
- Low-code application development
- Form-based apps and workflow
- Multiexperience development
- Digital commerce
- Digital asset management (DAM)
- Marketing resource management
- Product information management
- Payment gateway
- Customer service and sales
- CRM
- Customer communications management

## Magic Quadrant

Figure 1: Magic Quadrant for Digital Experience Platforms





Source: Gartner (February 2022)

## Vendor Strengths and Cautions

### Acquia

Acquia is a Leader in this Magic Quadrant. Its DXP is the Open Digital Experience Platform, comprising Drupal Cloud and Marketing Cloud. Acquia is the primary commercial company behind the Drupal open-source web content management (WCM) system. Acquia DXP offers broad capabilities for content management and customer experience, including personalization, analytics, customer journey management and a customer data platform. Acquia DXP is available as a platform-as-a-service (PaaS) offering, with some components available as software as a service (SaaS). Acquia is headquartered in Boston, Massachusetts, U.S. with presence in Europe and Asia/Pacific. Its solution is often deployed in the financial services, manufacturing, retail and consumer packaged goods (CPG) verticals. Acquia is best suited to B2C and B2B use cases, but its new Employee Experience solution targets B2E.

### Strengths

- Acquia has focused on composability via its DXP, targeting enterprises that want to rebuild their core digital foundation around modular solution architectures.
- The Drupal open-source community is extensive and very active. This community constantly contributes bug fixes and new functionality, and seeds an extensive marketplace for modules.
- Acquia has invested in business technology capabilities, including data science and citizen development (via its low-/no-code experience builder, Site Studio), in order to empower digital marketers.

### ***Cautions***

- In a market where innovation is accelerating, Acquia's pace of innovation has slowed, pushing customers to seek innovative solutions in the Acquia marketplace or via custom extensions and third-party integrations.
- Acquia's customer journey capabilities are weaker, in areas like journey orchestration, optimization and analytics, than those of other Leaders in this Magic Quadrant.
- Although Acquia places an emphasis on being "open," there are relatively few 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 Adobe Experience Cloud, which includes capabilities such as content management, analytics, personalization/targeting, customer data management, customer journeys and multichannel campaign management. It is available on-premises and as PaaS, with some components provisioned as SaaS. Adobe is headquartered in San Jose, California, U.S. and has a presence worldwide. It has customers in a variety of industries and of varying sizes. Adobe Experience Cloud's primary use case is B2C, but some organizations also use it for certain B2B purposes, and occasionally for B2E.

### ***Strengths***

- Adobe's DXP is widely adopted and highly recognizable. Many buyers choose it, as it is a proven and mature solution.
- Adobe offers a highly sophisticated, innovative and broad set of functionalities for digital marketing use cases, especially for B2C.
- Adobe has an extensive ecosystem that includes design and creative agencies, system integrators, marketing and advertising agencies and creative tools. This provides customers with many options to deploy and support Adobe products.

### ***Cautions***

- Adobe has a premium-priced product portfolio. Its total cost of ownership (TCO) is very high compared to other vendors in the industry.

- Adobe has a very complex set of digital experience management tools, resulting in an extremely steep learning curve, and specialized skill set and training.
- Adobe's support for the B2E use case remains limited due to the lack of depth and breadth of employee experience (EX)-specific functionality, such as collaboration and knowledge sharing.

## **Bloomreach**

Bloomreach is a Visionary in this Magic Quadrant. Its DXP is Bloomreach Experience Cloud, which focuses on content management, personalization, search and merchandising. It is available as a SaaS solution or as a hybrid cloud solution, part PaaS and part SaaS. Bloomreach has headquarters in Mountain View, California, U.S. and Amsterdam, Netherlands, and also has a presence in Asia/Pacific. Bloomreach's primary focus is fronting digital commerce experiences. Bloomreach Experience Cloud is deployed for B2C use cases in verticals such as retail, travel and banking, and for B2B use cases in manufacturing.

### **Strengths**

- Bloomreach has a growing partner ecosystem that includes global, regional and boutique service providers, providing implementation and consulting support globally.
- Bloomreach has refined its product focus into three well-defined capability "pillars" of engagement, discovery and content. These pillars help clients understand what they are purchasing. Clients can purchase these capabilities individually, enabling a more modular, incremental approach to deploying a DXP.
- Bloomreach's acquisition of Exponea Customer Data Platform (CDP) in 2021 brought additional data management benefits to its customers.

### **Cautions**

- Bloomreach continues to execute a relatively narrow go-to-market strategy, with a focus on B2C and B2B commerce-driven use cases. Prospective customers should carefully evaluate Bloomreach's product strategy, product roadmap and ability to support use cases beyond digital commerce.
- Bloomreach's transition of the content management core of its DXP from PaaS to SaaS in mid-2021 is nascent, and the SaaS offering lacks broad customer adoption. Prospective customers should carefully examine the capabilities, suitability and scalability of the SaaS offering.
- Bloomreach's partner channel is mainly available in North America and parts of Europe, with little penetration in other regions. Prospective customers with global ambitions need to assess the availability and quality of Bloomreach experts for global operations.

## **CoreMedia**

CoreMedia is a Niche Player in this Magic Quadrant. Its DXP is called CoreMedia Content Cloud, and its capabilities include content management, integration and interoperability. It is available as

a vendor-managed PaaS or can be self-managed, either on-premises or in a public cloud. CoreMedia is headquartered in Hamburg, Germany, and has a presence in other parts of EMEA and North America, as well as a more limited presence in Asia/Pacific. CoreMedia is used in a wide range of verticals, including retail, telecommunications, manufacturing, financial services, healthcare, and media and entertainment. CoreMedia's clients tend to use its DXP primarily for B2C, B2B and B2B2C use cases, with a particular focus on supporting digital commerce experiences.

### **Strengths**

- CoreMedia's strengths in supporting global multisite operations provide a solid platform to ensure consistency for brands.
- CoreMedia provides a lean core but a wide set of integrations supporting complex environments. Examples of integrations include Algolia, commercetools, Dynamic Yield, Kibo Monetate, Salesforce (Salesforce Commerce Cloud, Salesforce Marketing Cloud), SAP (SAP Commerce Cloud) and SiteImprove.
- CoreMedia provides comprehensive multisite, multiregion and localization tools, as well as scaling capabilities that support complex global brand rollouts.

### **Cautions**

- CoreMedia has a narrow go-to-market strategy, with a focus on digital-commerce-driven use cases. Prospective customers should carefully evaluate CoreMedia's product strategy, product roadmap and ability to support use cases beyond commerce.
- CoreMedia's personalization capabilities are basic. Customers with more advanced requirements need to rely on its "Personalization Hub," which provides connectors for third-party product integrations.
- CoreMedia's cloud strategy continues to lag behind those of its competitors in this Magic Quadrant. Its new DXP deployments are usually cloud-based, although the product itself is not cloud-native. Self-hosted customers may have to invest in additional cloud infrastructure and support.

### **Crownpeak**

Crownpeak is a Niche Player in this Magic Quadrant. Its DXP is the Crownpeak Digital Experience Platform, and its capabilities include content management, presentation and orchestration, as well as adjacent capabilities for consent management, compliance, governance and security. It is available as SaaS, although a PaaS offering was made available to the FirstSpirit customer base upon Crownpeak's acquisition of that platform. Crownpeak is headquartered in Denver, Colorado, U.S., and has a presence in Europe primarily through the acquisition of e-Spirit, which closed in March 2021. Crownpeak is often used by organizations in manufacturing, communications and media, retail and government. It is most often deployed for B2C and B2B use cases.

## **Strengths**

- Crownpeak provides strong AI-powered personalization capabilities using its Experience Optimization Engine, which arose from the acquisition of e-Spirit via original equipment manufacturer (OEM) model with Dynamic Yield.
- Crownpeak offers a cloud-native, multitenant SaaS DXP that often appeals to midsize organizations with fewer IT resources and no requirements for major customizations.
- Business users generally regard Crownpeak DXP's UI as easy to use.

## **Cautions**

- Crownpeak's acquisition of e-Spirit created confusion in the market because of the significant overlap in functionality between the two products. Prospective customers should carefully evaluate the roadmap, as well as Crownpeak's rationalization strategy, to ensure the solution fits their long-term requirements.
- Crownpeak natively covers a smaller part of the DXP technology landscape than some of the larger DXP vendors. It lags behind the competition in areas such as AI, customer data management, customer journey mapping and analytics.
- Crownpeak's partner ecosystem is small in a market that relies heavily on such ecosystems for both strategic consulting and implementation services. Prospective customers may find that resources to support implementation are scarce, as are technological alliances.

## **HCL Software**

HCL Software is a Challenger in this Magic Quadrant. HCL Software's DXP is HCL Digital Experience (DX), which is part of a wider HCL CX portfolio. Its core capabilities include content management, DAM, security and access controls and low-code application development. Existing HCL DX clients are primarily on-premises, although newer deployments are moving to the cloud. HCL is headquartered in Sunnyvale, California, U.S., and has global operations. Its DXP is deployed across government, life sciences, insurance, financial services and other verticals. It is used for B2B, B2C and B2E use cases.

## **Strengths**

- HCL DX is best suited to complex global deployments, which are usually on-premises or hybrid cloud.
- HCL has a broad range of clients across many industries and both external- and internal-facing digital experience scenarios.
- HCL has improved its cloud capabilities, providing both a self-service "solution factory," HCL SoFy and HCL Now, a managed hosting environment.

## **Cautions**

- HCL's complex set of capabilities and many options for deployment and integration can be a burden to organizations that need a more packaged approach.
- The complex nature of the product set and client requirements can result in a need for expertise in multiple HCL products and reliance on either partners or HCL's own professional services.
- For customer data management, HCL DX's built-in tooling is limited. For more advanced capabilities, customers rely on a separate product called HCL Unica, or on third-party product integrations.

## **Kentico**

Kentico is a Niche Player in this Magic Quadrant. Its DXP, Kentico Xperience, includes a wide range of functionalities, such as personalization, marketing automation and B2B commerce. It is available 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 the government, education, retail, healthcare and manufacturing verticals. It is typically used by midsize organizations for B2C, B2B and B2E use cases.

### ***Strengths***

- Kentico's simplicity appeals to midmarket and upper-midmarket organizations that consider it an attractive alternative to the more complex offerings of traditional leading DXP vendors.
- Kentico offers good value for money and an easy-to-navigate pricing model that allows for growth.
- Prospective and current customers praise Kentico for its ease of adoption and usability, as well as its relative ease of deployment, which usually takes a shorter time than its competitors' offerings.

### ***Cautions***

- Kentico Xperience's personalization, customer journey mapping and customer data management capabilities are weaker than those provided by other DXP vendors.
- Kentico's latest release was a major revamp of the legacy Enterprise Marketing Suite product, which the vendor has sold for many years. Current customers may need to start planning for a substantial upgrade. An upcoming new product, called Xperience by Kentico, may add hurdles.
- Kentico's headless capabilities are reserved purely for the Kentico Kontent product, and are not easily transferable to its DXP. Prospective customers need to understand that there is no simple upgrade path from Kentico Kontent to Kentico Xperience.

## **Liferay**

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

### **Strengths**

- Enterprise IT buyers often find Liferay appealing due to its powerful developer tooling and pure-play portal heritage.
- Liferay provides a strong offering in terms of extensibility and application development and integration, and is often used in complex scenarios that require multiple integrations and customizations.
- Liferay's open-source version offers significant contributions from a vibrant community, as well as a relatively low TCO, with enterprise licenses adding advanced features and support.

### **Cautions**

- Liferay's cloud strategy is maturing, with improvements in cloud operational and management aspects, but there are still gaps.
- Liferay's Java heritage is still visible, as core platform APIs are based on Java. This leads to a complex model for implementation and development.
- Use of Liferay DXP for some B2C use cases can be challenging due to its limited digital marketing features, including nascent personalization, customer journey and customer data management.

### **Magnolia**

Magnolia is a Visionary in this Magic Quadrant. Its DXP is Magnolia DX Core, with capabilities that include content management, personalization, search and campaign management. It is available on-premises, or as a PaaS in a public or private cloud. Magnolia is headquartered in Basel, Switzerland, and has some presence across North America, EMEA and Asia/Pacific. It is deployed by midsize and large organizations in a broad range of verticals, with some focus on banking, media and communications, and travel and hospitality. It is most often used for B2C and B2B use cases.

### **Strengths**

- Magnolia focuses on offering an extensible DXP built from best-of-breed components from different vendors, to the point of enabling customers to replace native content management system (CMS) capabilities.

- Magnolia's DXP is a PaaS, but it has been containerized and made "portable" across multiple cloud infrastructures, allowing its customers more flexibility.
- Magnolia's user interface is regarded as user-friendly and intuitive for nontechnical users.

### **Cautions**

- Magnolia's modular and "lean" DXP approach, centered in integrations, may not be attractive to prospective customers looking for a more packaged DXP.
- Awareness of Magnolia's brand outside Europe and parts of Asia/Pacific remains low. Gartner rarely sees it on client shortlists. Prospective customers should carefully evaluate the availability of experienced resources and implementation partners in their geography.
- Magnolia focuses on B2C and B2B use cases. Prospective customers should carefully evaluate its functionality to determine its applicability to B2E use cases.

### **OpenText**

OpenText is a Challenger in this Magic Quadrant. Its DXP is the OpenText Experience Platform, and its capabilities include content management, analytics, personalization, optimization and DAM. It is available on-premises, or can be hosted on a public cloud through Microsoft Azure, Amazon Web Services or Google Cloud, on a private cloud through OpenText Private Cloud, or as a fully managed service. OpenText is headquartered in Waterloo, Ontario, Canada, and has a global presence. OpenText is used in a variety of verticals, including manufacturing, government, retail, financial services and insurance. It is most often deployed for B2C use cases, but is also applicable to some B2B use cases.

### **Strengths**

- OpenText's expertise in serving organizations in highly regulated industries makes it a good choice for buyers needing governance, security, account management and auditability in authenticated experiences.
- OpenText's Media Widget as "micro UX" is a good example of meaningful early-stage composability. It makes media access and search readily available to any application, with assets tracked and managed in OpenText's DAM.
- Organizations looking to create a single information management strategy encompassing DXP, customer communications management, document management, content services and content collaboration may benefit from a single vendor.

### **Cautions**

- Potential DXP customers don't often consider the OpenText Experience Platform unless they have already made substantial investments in OpenText's other information management offerings, as the vendor isn't as experienced as its competitors in terms of addressing cutting-edge requirements.

- While OpenText has expanded its cloud options, they remain largely unproven in the market, with few success stories.
- OpenText's CDP story, a crucial factor in the immediate and long-term effectiveness of a DXP, is a work in progress and relies on an integration with Google Marketing Cloud.

## Optimizely

Optimizely is a Leader in this Magic Quadrant. Its DXP is Optimizely Digital Experience Platform, which includes content management, personalization, customer data management and analytics. It is available on a subscription basis as a hybrid cloud solution, employing some SaaS components with management UIs, orchestrated around a single-tenant PaaS. Optimizely is headquartered in New York, U.S., with presence across EMEA and parts of Asia/Pacific. Its DXP is most often used at midsize-to-large enterprises in specialty retail, manufacturing and distribution, high tech, healthcare, commercial services and financial services. It is most often used for B2C and B2B use cases.

### Strengths

- Optimizely's acquisition of Zaius' CDP should bring new customer journey mapping capabilities, improved personalization and targeting, and actionable insights to its customers.
- Optimizely's pricing and packaging is simple, scalable, modular and transparent compared to competing offerings. This enables customers to start small and grow in line with their digital experience evolution.
- Optimizely provides rich capabilities in digital experience optimization and multivariate testing.

### Cautions

- Optimizely's DXP may not be as versatile across use cases as some other DXP offerings. Traction and experience in B2B use cases is limited, despite its technical suitability for those purposes.
- Limited security and access control, as well as narrowly applied collaboration and knowledge sharing capabilities, make Optimizely's DXP a difficult fit for many B2E use cases. Prospective customers considering Optimizely for employee experience scenarios should examine carefully the additional capabilities they would require.
- Optimizely has recently made a substantial number of acquisitions. Prospective and existing customers should plan for potential volatility in its roadmap, including evolving integrations of acquired technologies and disruption to sales and customer service.

## Oracle

Oracle is a Challenger in this Magic Quadrant. Oracle offers a DXP through its Oracle Advertising and Customer Experience (CX) product, which includes content management, AI, analytics, security, advertising, marketing, service and sales, among other capabilities. Oracle Advertising

and 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. It is mainly used for B2C and B2B use cases.

*Oracle did not respond to requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources, including public information.*

### **Strengths**

- Oracle has a global presence and an extensive partner ecosystem that provides choice for customers from both a strategic and an implementation perspective. It has technology alliances with independent software vendors.
- Oracle's offering is differentiated by content and digital asset management, file management and collaboration, B2B/B2C experience orchestration and personalization capabilities.
- Oracle's pricing and packaging model enables customers to start small and grow incrementally as business demands increase or digital strategy matures.

### **Cautions**

- Oracle's increased focus on the Advertising and CX suite has resulted in decreased focus on its DXP roadmap, go-to-market and digital experience management.
- DXP buyers often do not shortlist Oracle as a DXP vendor unless they have already bought several other Oracle products.
- Oracle's monolithic suite may not appeal to organizations that are pursuing a composable DXP strategy that is modular and interchangeable.

### **Progress**

Progress is a Niche Player in this Magic Quadrant and a new entrant this year. The core of its DXP, known as Sitefinity DX, is a WCM product, which is complemented by Sitefinity Insight for personalization and optimization and by Corticon for decisioning, forms and business process management. The portfolio also includes differentiating capabilities such as NativeChat, a configurable conversational interface, and MOVEit for secure file transfer. The offering is available on-premises or as a fully managed PaaS in the form of Sitefinity Cloud. Progress is headquartered in Bedford, Massachusetts, U.S., and has a significant global presence, both through its own efforts and via partners. Sitefinity DX is typically aimed at midsize organizations looking to grow, and is most frequently deployed for B2C marketing use cases.

### **Strengths**

- Sitefinity DXP is regarded as good value for money. Its pricing is clear and predictable, and it enables customers to start small and grow incrementally.

- Sitefinity is relatively easy to use, with low-code and drag-and-drop features for form creation and intuitive personalization and content targeting.
- Unlike most other DXP providers, Progress provides its own integrated components for conversational interfaces (NativeChat). Therefore, organizations do not have to seek out and integrate with third parties for multiexperience innovations.

### **Cautions**

- Progress' DXP messaging and go-to-market approach are not as forward-looking, crisp or convincing as those of its competitors, a shortcoming that results in buyer confusion and low brand recognition.
- Progress is more limited in regard to integrations, extensibility and customizations than other vendors in this Magic Quadrant. Prospective customers should carefully evaluate the required levels of effort to implement both Progress' overall product portfolio and third-party integrations.
- Progress struggles to strike a balance between offering a flexible platform and a ready-to-go DXP application. Prospective customers should be prepared to invest in custom development and integration.

### **Salesforce**

Salesforce is a Challenger in this Magic Quadrant. Salesforce's DXP is Salesforce Experience Cloud, which offers capabilities for content management, personalization, AI, customer journeys, CDPs and integrations. Salesforce Experience Cloud is offered as SaaS. 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, although some customers use it for B2E.

### **Strengths**

- Salesforce's market penetration and breadth of functionality provide a significant competitive differentiator in B2B and B2C use cases.
- Salesforce positions Experience Cloud as the "connective tissue" across its portfolio. This may be especially useful for existing customers that have already invested in Sales Cloud, Marketing Cloud, Service Cloud, Commerce Cloud and other products.
- Salesforce's 100% SaaS model, coupled with its extensive partner ecosystem, App Exchange marketplace and developer community (Trailhead), help to ensure rapid deployment and reduced time to value.

### **Cautions**

- Salesforce's vision for Experience Cloud in areas like personalization, optimization and multiexperience support lags behind that of the leading vendors.

- Salesforce CMS — the underlying content management layer in the DXP — lacks feature and function parity with the more established CMS components of other DXP offerings. It is not well-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 a premium-priced product. 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 Digital Experience Platform, which offers capabilities for content management, personalization, optimization and customer data management. Sitecore Digital Experience Platform is currently transitioning to SaaS, as the vendor has adopted a new vision based on several acquisitions supporting customer data management, personalization, marketing resource management and search. Sitecore is headquartered in San Francisco, California, U.S., and has a presence in EMEA and Asia/Pacific. Sitecore's DXP is most often deployed in the healthcare, retail, manufacturing and travel verticals. It is mostly used for B2C use cases, as well as some B2B use cases.

### **Strengths**

- Sitecore is undertaking a journey toward composability and the cloud, converting its applications into SaaS components and acquiring SaaS vendors with complementary capabilities in AI, CDP and search, among others.
- Sitecore offers a broad set of capabilities for CX-centric scenarios and B2C use cases. Organizations with sophisticated digital marketing requirements and a solid CX strategy often find it appealing.
- Sitecore has an expansive global network of partners and technology alliances, offering its customers plenty of choice in terms of technical implementation or digital strategy support.

### **Cautions**

- Sitecore's shift to SaaS is a multiyear program of work that has the potential to disrupt Sitecore's installed base, which primarily operates in self-hosted IaaS and vendor-managed PaaS cloud environments.
- Sitecore has been behind the market pace in acquiring products to improve its customer data management, personalization and other capabilities. Current and prospective customers should carefully evaluate the ongoing rationalization and integration strategy.
- Sitecore's support for the B2E use case remains limited compared with that of other vendors in this Magic Quadrant. Prospective customers should carefully evaluate its functionality to determine its suitability to employee-experience-focused use cases.

## **Squiz**

Squiz is a Niche Player in this Magic Quadrant. Its DXP platform is Squiz DXP, which includes capabilities for content management, search, personalization, data management and integration. It is available on-premises and as SaaS. Squiz is headquartered in Sydney, Australia, and has a small presence outside Asia/Pacific in geographies such as North America and EMEA. Squiz DXP is most often deployed by midsize organizations in the government, utilities and higher education verticals. It is used for B2C, B2E and B2B use cases.

### **Strengths**

- Squiz's DXP allows for a comparatively short time to value, low TCO and shallow learning curve for both technical and business users.
- Squiz's DXP is modular, consisting of distinct products: Matrix (for content management), Funnelback (for search), Datastore (for data services) and Connect (for integrations). This gives customers the flexibility to buy only the components they need.
- Squiz has completed its transition from on-premises and PaaS to SaaS. Although most of its installed base is either self-hosted or on-premises, Squiz goes to market with a multitenant SaaS cloud-first approach, with only Matrix and Funnelback still available for self-hosting.

### **Cautions**

- Squiz focuses primarily on midsize organizations in the higher education, utilities and government verticals. Prospective customers in other verticals and larger enterprises need to carefully examine Squiz's roadmap to ensure alignment with their requirements and strategic objectives.
- Squiz's implementation, technology and agency partners remain relatively few outside Asia/Pacific. Prospective customers should ensure that skilled resources are available in their regions.
- Squiz lags behind its competitors in feature sophistication across multiple areas, such as personalization, customer journey mapping, customer data management and analytics and optimization. Customers with these requirements should plan to complement Squiz with third-party best-of-breed products.

### **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

- Progress

## Dropped

- e-Spirit, due to its acquisition by Crownpeak

# Inclusion and Exclusion Criteria

## Business Criteria

- **Revenue:** Each vendor's DXP offering must have generated revenue of at least \$17 million with at least 5% year-over-year revenue growth in the 12 months leading up to June 2021. Revenue includes perpetual licenses and/or cloud subscription and maintenance revenue. Professional services, training, onboarding and infrastructure/hosting revenue were excluded. The vendor must have acquired at least 10 net new customers in the 12 months leading up to June 2021.
- **Market presence:** Each vendor had to have been marketing and selling its DXP product since at least June 2020.
- **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 at least three of the following verticals: banking and securities, communications, media and services, education, government, healthcare provision, insurance, manufacturing and natural resources, retail, transportation, utilities and 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. This ecosystem may include aspects 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 in its go-to-market activities, such as positioning, marketing, messaging, pricing and packaging for its DXP. 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, 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, as they often need to support 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, overall success and product vision, together with the likelihood that it will continue to invest in its product. The assessment concerns both a vendor's overall financial health and the financial and practical success of the relevant business unit. During the assessment, the organization's cash and equity position, growth in the market, management and financial strategy are evaluated.

**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, as well as 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. It assesses customer satisfaction, the quality of supplier-buyer interactions, technical support and account support. Other aspects examined include ancillary tools, documentation, customer support programs,

customer success programs, availability of support communities and service-level agreements (SLAs).

**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**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
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 (February 2022)

## 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 consistently communicated 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 examine how the business model is aligned with the 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 through their 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**

<b><i>Evaluation Criteria</i></b> ↓	<b><i>Weighting</i></b> ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (February 2022)

## 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. However, 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 meet 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 have 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 in conjunction with this Magic Quadrant.

## Market Overview

When organizations need to deliver highly contextualized digital experiences — beyond simple websites and mobile webpages — they turn to a DXP for breadth of functionality and the ability to cover an increasing variety of modalities and channels across customer journeys. DXPs are often deployed at the center of content operations ecosystems. In 2021, the DXP market was influenced by these trends:

- **Content operations:** Despite the commoditization of content management features and the WCM roots of most DXP vendors, many organizations are struggling to elevate their content management to the levels needed to provide highly personalized digital experiences (see [Gartner Retires 'Magic Quadrant for Web Content Management' as Commoditization Fuels Digital Experience Management Opportunity](#)). Content operations ecosystems are on the rise, with a DXP often at the center of them, given that content management remains a big priority for the majority of global organizations. DXP providers have been expanding the breadth and depth of content types they can cover by offering, for example, DAM for rich media and product information management (PIM) for product-related data.

- **Headless CMS:** Headless architectures, including CMS, continue to disrupt the DXP market. Drivers include a facility for multiexperience delivery, a desire among organizations to assemble their own DXP as part of a composable strategy, and a move toward cloud-native architectures and consumption-based pricing.
- **Composable DXP.** Currently, the proportion of organizations opting to assemble a DXP from multiple composable components is roughly equal to that choosing to purchase a monolithic solution from a single vendor. However, there are indications that the market is moving more toward composable DXPs, so this ratio will soon start to change. Composable DXPs are becoming more desirable as organizations are seeking flexibility, modularity and, ultimately, business agility. For now, however, most DXPs remain monolithic software (not SaaS) solutions at their core.
- **Content plus commerce:** Owing to the COVID-19 pandemic and resulting surge in digital commerce, self-service and service delivery, the content-plus-commerce model has seen a dramatic rise in popularity. Many DXP vendors have been either bolstering their own commerce solutions or expanding integrations with best-of-breed digital commerce, search and merchandising vendors. This applies not only to B2C, but also increasingly to B2B use cases. In B2B, the convergence of DXP, digital commerce and digital sales enablement tools is enabling a combination of self-service and assisted digital selling, with ongoing interactions between buyers and sellers.
- **Employee experience:** Historically, very few DXP vendors have had a strong feature set and/or strategy to support B2E use cases. However, the landscape of employee-experience-related strategies and technologies is rapidly changing, as is reflected in Gartner's updated definition of the DXP B2E use case, as defined in the companion Critical Capabilities report. As organizations move toward the "total experience," which links the employee experience and the customer experience and renders them interdependent, some are choosing either to deploy existing DXPs for B2E use cases or seek out packaged intranet apps.
- **The rise of CDPs:** Gartner observes an increase in the adoption of CDPs to provide a 360-degree view of the customer that can be used to enhance digital experiences. This has resulted in many DXP vendors acquiring such solutions or bolstering their customer data management capabilities organically. At the same time, the vast majority of organizations deploying CDP functionality are struggling to make good use of integrated customer data.
- **Push for low-code:** "Low-code" tools support scripting for capabilities that go beyond the limits of a "no-code" approach. The low-code/no-code development market has seen dramatic growth. DXP buyers are pushing for low-code tools within a DXP in order to accelerate innovation and decrease time to value. These tools also enable organizations to create customizations by writing just a small amount of code. Compared with no-code, low-code requires a higher level of developer buy-in and skills alignment.

## 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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