

REPORT

The Content Management Systems Landscape, Q4 2024

Forrester's Overview Of 36 Vendors

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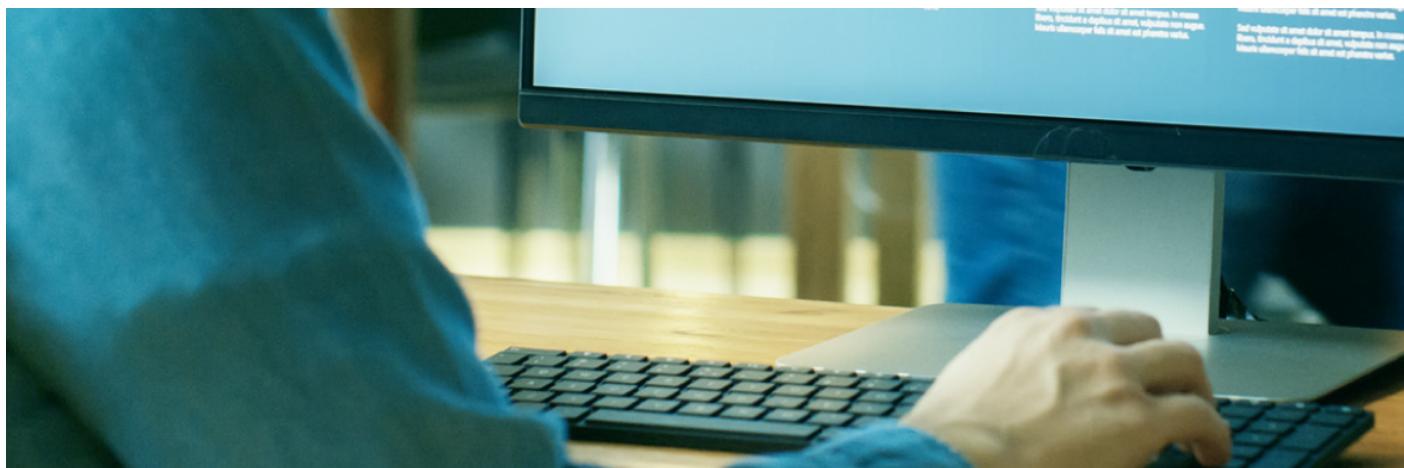
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You can use a content management system (CMS) to reduce time to market with digital experiences, drive better customer experience and brand consistency, and smooth content operations through innovations. CMSes deliver brand consistency, translated content, and streamline content operations. But to realize these benefits, you'll first have to select from a diverse set of vendors that vary by size, type of offering, geography, and use case differentiation. Digital and technology leaders should use this report to understand the value they can expect from a CMS vendor, learn how vendors differ, and investigate options based on size and market focus.

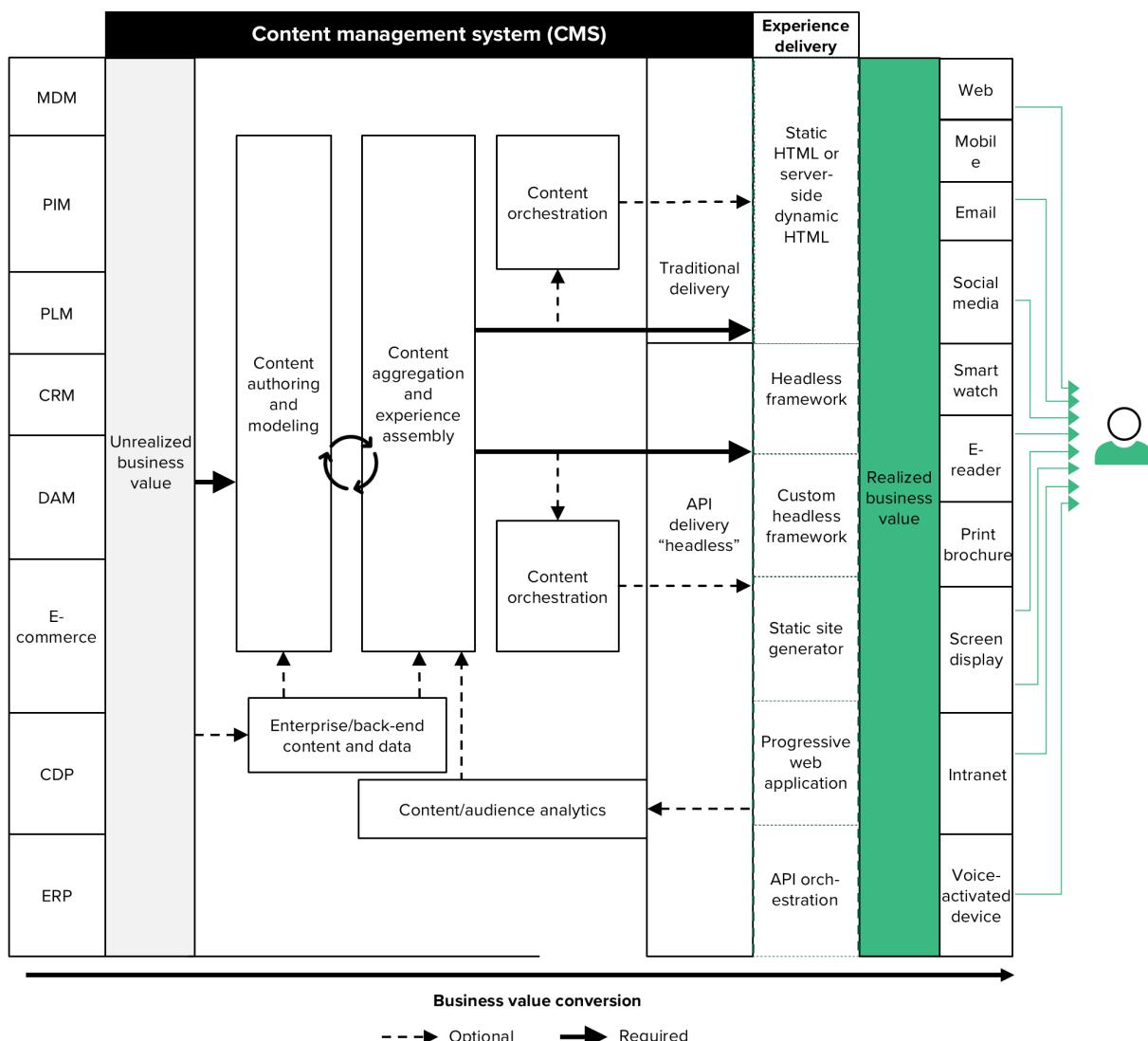
Market Definition

Content management systems play a pivotal role in determining the digital success of an organization because they enable digital leaders to orchestrate digital experiences on the glass. CMSes, largely software-as-a-service (SaaS) solutions, continue to evolve their foundational capabilities as consumer demand for personalized digital experiences, across a multitude of digital touchpoints, is driving significant investment and innovation. According to

Forrester's March 2024 Consumer Pulse Survey, 42% of US online adults like to see offers and promotions relevant to them before purchasing a brand's product or service. Forrester defines a CMS as:

A platform that allows organizations to collaboratively manage the creation, aggregation, and experience delivery of content to multiple endpoints.

A CMS allows customers to author copy, aggregate content and data (including from enterprise/back-end systems), assemble the experience using rich media assets (e.g., images, audio, video files), and orchestrate the delivery to print and digital touchpoints. CMSSes can either fully deliver the front-end experience on a digital touchpoint via templates in the CMS or expose the content via an API endpoint — “headless” API delivery (see Figure 1). Some CMS vendors provide both experience delivery capabilities in their solutions; Forrester refers to these as hybrid CMSSes.



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Figure 1 - Converting Business Value Through A CMS's Capabilities

Business Value

Through emerging features that enhance the core capabilities of content authoring and management, CMSes continue to offer businesses more benefits in terms of growth and operational efficiency. CMSes were traditionally sought out for information dissemination, and then subsequently for demand-gen marketing. Now the growing list of generative AI (genAI)-enabled features and API capabilities are evolving CMSes' role for a third time: as the orchestrators of personalized digital experiences. Forrester's Strategic Technology Selection Guide for CMSes outlines the drivers for a CMS. Digital and technology leaders implement CMSes to:

1. **Reduce time to market with efficient digital experiences, accelerating growth.** Consumers expect optimized digital experiences, and businesses are using robust edge architectures bundled with CMSes to deliver digital performance at a global scale. Digital leaders are also using genAI capabilities in CMSes (e.g., copy generation in a brand's tone and voice, content variant generation for experimentation, content localization). These increase performance and operational efficiencies while reducing time to market for experiences, enabling teams to boost their impact on customer engagement, acquisition, and share of wallet growth.
2. **Drive better customer experience and brand consistency, reducing costs.** Modern enterprises simultaneously manage multiple websites, apps, and digital marketing campaigns. By consolidating onto a single CMS, digital leaders centrally manage omnichannel experiences using a brand-optimized front-end framework, reusable components, a global taxonomy, and content items governed through a content lifecycle. This enables consistent digital experiences, as well as continuous

calibration of storage costs associated with outdated sites, landing pages, and apps, while adhering to global compliance, regulatory, and sustainability standards.

3. **Smooth content operations through innovations, increasing team velocities.** From content ideation to experience launches, content moves through many teams, departments, and systems before it is input into a CMS for digital delivery. CMSSes significantly reduce development time to bring new digital experiences to life via features like content planning tools, visual builders, live experience previews, and self-learning experimentation. These tools enable tech, marketing, and business leaders to break down silos, collaborate, and reduce rework as they begin to centralize on the CMS for the last mile of content delivery: on the glass.

Market Maturity

CMSSes now routinely offer API-based experience delivery on the edge along with a long list of integrations to help marketing leaders convert, engage, and retain more customers. CMS is the largest technology category in the web content management software market, whose growth is forecasted to outpace the larger software market with a 13.5% CAGR; CMSSes are projected to grow 15.2% in 2024. Additionally, in Forrester's Marketing Survey, 2024, 69% of global B2C marketing decision-makers said that they plan to increase their investment in content management technology. CMSSes continue to evolve as a mature market that sees steady innovation as well as:

1. **A stable quantity of vendors with a few dominant leaders.**

Several CMS vendors have been in the market with foundational CMS capabilities for the past two decades. In that time, they

have acquired several startups to capture market share and enhance their CMS capabilities' impact on digital experiences. Simultaneously, startups continue to enter the market, leading with singular capabilities (e.g., visual builders) to introduce new innovations.

2. **Mostly production implementations and upgrading**

capabilities. Most organizations evaluating CMS solutions seek to replace a previously implemented solution. Nearly all customers seek enhanced core capabilities from these replacement initiatives: content authoring and modeling, content aggregation, content orchestration, or experience delivery. Very few are first-time implementations.

3. **Pivots that happen cyclically as disruptive threats occur.**

“Headless” — the last major categorywide pivot — was an emerging feature that initially enhanced the experience delivery capability of a shortlist of CMSSes. The market, however, ended up forcing vendors in the category to include API-based delivery in their product offering; most of the CMS vendor landscape now offers this capability at varying levels of fidelity.

Market Dynamics

CMS is a mature market that is facing three major headwinds. Digital and technology leaders have a plethora of vendor options and should pay attention to the following market dynamics (see Figure 2):

1. **Main trend.** Leaders face pressure to demonstrate business impact due to genAI innovations in digital experience technologies. This requires executives to present roadmaps to company boards, showcasing business value generation. GenAI capabilities have already impacted content pipelines by writing