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Business Value Highlights

348% three-year ROI

23% higher productivity for digital experience teams

64% decrease in time required to make minor editorial changes

66% faster delivery of new brand or country sites

10% increase in site visits per month

$2.2 million higher revenue per year per organization over five years

The Business Value of Adobe Experience Manager Sites

EXECUTIVE SUMMARY

Improving the customer experience is a strategic imperative for most organizations today, but delivering an engaging experience across the growing number of digital customer touch points can be a daunting challenge.

Organizations must deliver responsive experiences that "play well" on smartphones, PCs, and tablets. They must publish content to installed app experiences on mobile and other connected devices, to social channels, and to email campaigns. They must manage global sites in different languages, localize the experience for different markets, and — increasingly — personalize the experience for different customer personas or segments.

A modern digital experience management platform is essential for any organization hoping to make digital experience delivery a core competency.

IDC interviewed organizations using Adobe Experience Manager Sites (AEM Sites) to understand the impact of the platform on their ability to create, manage, and deliver digital experiences. Study participants reported substantial gains in both team productivity and customer engagement — resulting in better business results.

According to IDC's analysis, AEM Sites enables organizations to realize on average annual business value of $3.92 million per organization over three years and a 348% three-year ROI by:

- Making the creation and delivery of digital experiences more consistent and streamlined and accelerating time to market for new experiences

- Empowering — and increasing the productivity of — employees responsible for digital experiences

- Improving the digital customer experiences organizations deliver, thereby increasing engagement levels and generating additional business

SITUATION OVERVIEW

The customer experience continues to move online, to digital channels, as millennials, Gen Xers, and other digital natives reach their prime as consumers. Their influence is already very evident in growth of mobile internet traffic, the use of connected location-based services, and the adoption of new social channels and messaging apps. Brands must be able to create, manage, and deliver consistent experiences across all the devices and channels their customers use if they are to fully engage them.

Most organizations have invested to make their web experiences responsive — although, as IDC research shows, this is still a work in progress for many. Most organizations need to manage experiences for multiple brands in multiple markets, requiring translation and localization; this is another area where many organizations still struggle. Marketers increasingly want to personalize the experience for particular personas or customer segments, adding to the complexity.

In addition to web (browser-based) experiences, organizations must be able to syndicate content to social channels, push content to email campaigns, and support installed app experiences on mobile devices. We are starting to see new app experiences on IoT devices such as connected cars, TVs, digital signs, smart speakers, and wearables. The popularity of messaging apps such as WeChat and Facebook Messenger offers intriguing new opportunities. We'll need to push content to chatbots, augmented reality experiences, and more. One thing is sure: We're in a time of rapid innovation, and new channels and devices will continue to emerge.

Organizations need a robust web experience management solution to address these challenges.

Content Velocity

Marketing organizations are under pressure to accelerate the delivery of new digital experiences. They need to improve content reuse and consistency. They need actionable insights to guide them as they optimize their experiences. They also need to collaborate more effectively and efficiently. A modern digital experience management solution helps here, too, by enabling cross-functional teams to automate and streamline the many workflows involved in creating, managing, and delivering digital experiences.

ADOBE EXPERIENCE MANAGER SITES

Adobe Experience Manager Sites is the web experience management component of Adobe Experience Manager. AEM Sites enables organizations to create, manage, and deliver digital experiences to web, mobile, and other channels in a unified way that improves consistency and content reuse. AEM Sites empowers marketers and other content contributors to quickly and easily publish web and mobile experiences without relying on IT or developers.

Key capabilities of AEM Sites include:

- **Multisite management.** AEM Sites gives organizations control over all their web and mobile properties, including sites, microsites, landing pages, and emails, with integrated translation management and localization capabilities. AEM Sites reduces the amount of time and effort required to tailor experiences for different brands, geographies, markets, and customer segments, improving consistency and building brand value.

- **Responsive design.** AEM Sites delivers fully responsive experiences across devices and browsers on PCs, mobile devices, tablets, digital signs, and other screens.

- **Mobile content management.** AEM Sites enables marketers to push content, app updates, offers, and notifications to installed app experiences without needing to involve IT or the development team. This ensures that in-app experiences are kept up to date with web and mobile web experiences.

- **Ease of authoring for marketers and other content contributors.** AEM Sites has an intuitive user interface that makes it easy for nontechnical users to create and publish new experiences or update existing pages.

- **Robust workflow capabilities.** AEM Sites lets teams automate and streamline their workflows, improving team productivity and accelerating time to market.

- **Marketing campaign management.** Integration with Adobe Campaign improves consistency and content reuse across emails, launch sites, and other properties.

- **Personalization and optimization.** Integration with Adobe Target enables marketers to discover and define customer segments, personalize content for different segments, and test new experiences prior to launch, ensuring maximum engagement.

- **Commerce integration.** AEM Sites provides an ecommerce framework that lets merchandisers create compelling, dynamic shopping experiences. Integration with AEM Assets adds dynamic imaging and video publishing; integration with Adobe Target adds automated recommendations.

- **Actionable insights.** Integration with Adobe Analytics gives marketers the insights they need to continuously improve customer engagement, conversion, and advocacy.

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THE BUSINESS VALUE OF AEM SITES

Study Demographics

IDC interviewed six large organizations for this study. Study participants were asked a variety of quantitative and qualitative questions about the impact of deploying Adobe Experience Manager Sites on their ability to create, manage, and deliver digital experiences to customers and employees. The average number of employees in the interviewed organizations was 57,667, while the average revenue was $5.4 billion. Vertical industries represented included the healthcare, marketing, professional services, retail, software, and travel sectors.

Survey respondents described various reasons for choosing the AEM Sites platform. They identified the following key criteria for selecting AEM Sites:

- Implementing a single consolidated content management system

- Avoiding task duplication via a centralized template

- Benefiting from rich features

- Producing more optimized content efficiently

- Lessening dependency on development teams

- Creating efficiencies through integration across their Adobe Experience Manager ecosystems

Commenting on the benefit of having a single consolidated content management platform with AEM Sites, one survey respondent said: *"We initially started with AEM Sites because we had a bunch of sites that were using different technologies. We wanted to streamline the technological architecture, a lot of which was a little old and was a mishmash of different things. We just wanted to be able to stand up a platform that would allow the business to maintain their day-to-day business operations, without reaching out to the development team."* On the benefit of centralization, another said: *"The value of AEM Sites goes back to the centralized model. It has been immensely helpful because we have a publishing system that relies on master files and templates. AEM Sites has saved us a lot of oversight and avoided lots of replication — we can all just feed off the central template."*

Table 1 provides a profile of the surveyed Adobe customers using AEM Sites. These organizations are supporting their core brands with AEM Sites but are using it for a substantial number of websites — 31 on average — with an average of over 50,000 web pages. The websites generate significant activity for these organizations: 14.9 million visits on average per month from over 1.5 million unique visitors.

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Among surveyed organizations, the most common use cases for AEM Sites are:

- Supporting customer-facing websites
- Supporting extranets used by third parties
- Pushing content to social media platforms
- Communities pushing content to mobile and chat applications

Several study participants noted that they expected to increasingly use AEM Sites in the context of leveraging new technologies such as headless content management and using AI for personalization to support the creation and delivery of digital experiences. One Adobe customer commented: *"We're moving to a more personalized digital experience across the firm, which is one of the reasons that we're implementing Adobe Target, to better personalize the content to the user … . We're also moving to AEM Assets. The [full] value of AEM Sites is going to come to bear after we've integrated all these things."*

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TABLE 1 Demographics of Interviewed Organizations

	Average	Median
Number of employees	57,667	15,500
Company revenue	$5.4 billion	$725 million
Number of countries supported by AEM Sites	39	2
Number of websites supported by AEM Sites	31	38
Number of web pages supported by AEM Sites	53,425	9,350
Number of monthly page views	14.9 million	2 million
Industries	Healthcare, marketing, professional services, retail, software, and travel	

n = 6

Source: IDC, 2018

The use of AEM Sites at interviewed organizations is centered on teams responsible for creating and delivering customer-friendly digital experiences, including marketing (52), graphics and web designers (12), and developers (36). More broadly, AEM Sites is used by those responsible for creating content that provides the foundation for digital experiences, with an average of 112 casual content contributors on the AEM Sites platform at interviewed organizations. Table 2 presents data on use of AEM Sites by these teams at interviewed organizations.

TABLE 2 Use of AEM Sites by Team at Interviewed Organizations

	Average	Median
Marketing	52	10
Casual content contributors	112	70
Graphics and web designers	12	10
Developers	36	29
Customer support	1	0
IT	14	10
Total	226	165

n = 6

Note: Total median does not equal sum of team medians because it is calculated as the median of total AEM Sites used by organizations.

Source: IDC, 2018

Business Value Analysis

Adobe customers attributed more effective and efficient creation and delivery of digital experiences to their use of AEM Sites. They moved to AEM Sites from a mix of vendor and in-house solutions that failed to provide a single consistent platform for leveraging digital content to support their businesses. The result was often fragmentation that generated inefficiencies and could not support business operations increasingly reliant on the timely creation and delivery of digital experiences.

By moving to AEM Sites, study participants have made significant strides in streamlining the creation and delivery of content that drives digital experiences sought by both customers and employees. Per one study participant: *"The value of AEM Sites goes back to the centralized model; it has been immensely helpful because we have a publishing system that relies on master files and templates. AEM Sites has saved us a lot of oversight and avoids lots of replication."* Interviewed Adobe customers reported that this has resulted in enablement and higher productivity for teams whose work centers on the creation and delivery of digital content and digital experiences that better engage customers and ultimately lead to better business results.

IDC's analysis shows that study participants are achieving significant value with AEM Sites. The most significant driver of value is enabling individuals and teams responsible for creating and delivering digital content; but they are also increasing revenue, reducing staff time spent on managing their content platforms, and optimizing costs related to content development. IDC puts this combined value at an average of $3.92 million per year per organization over three years ($17,340 per AEM Sites user), as described in the sections that follow.

Supporting More Efficient Creation and Delivery of Digital Experiences

Study participants reported that AEM Sites supports more efficient creation and delivery of digital experiences through functionality compared with previous approaches, including other vendor solutions and more manual-focused efforts, that allows them to better leverage digital content. This functionality includes:

- Ability to better locate digital content
- Ease of downloading/uploading digital content to central and remote sites
- Less time spent on creating digital content/experiences
- Faster delivery of digital content
- Higher-quality digital content/experiences through personalization
- Better leveraging of external content

As one survey participant commented: *"AEM Sites has allowed us to be a lot more efficient and effective in delivering content. It also ties the digital experience together across multiple platforms, whereas before it was very fragmented. It sets us up to be able to do more around the digital experience of the future."*

Table 3 shows impacts on activities that enable these Adobe customers to deliver timely and rich digital experiences. The frequently needed but often time-consuming process of making minor editorial changes showed a 65% improvement in total staff time required. Commenting on this benefit, one survey participant said: *"It took over an hour before AEM Sites to make a minor editorial change to a form, plus all the downstream processes like reprinting, redistributing all those physical things. There are probably 100 people no longer doing that. That was really their whole job."*

With AEM Sites, the total time required for putting up a launch page is reduced by 75% and staff time by 56%. Similarly, the overall time and staff resources needed to deliver a new brand or country site have also declined with AEM Sites by 66% and 60%, respectively. Commenting on the ability to move technical staff resources to other higher-value activities, one survey respondent commented: *"AEM Sites certainly has empowered people who wouldn't otherwise have the ability to create a web page. This frees up technical people that do have that capability to develop more advanced things and disperses our workload to people who previously were just writers. Now, with AEM Sites, they are actually building pages, putting copy in place, and publishing those pages."*

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TABLE 3 Impact on Delivery of Digital Content and Experiences Using Adobe Customers

	Before AEM Sites	With AEM Sites	Difference	Benefit (%)
Making minor editorial changes to sites				
Total time required (hours)	8.0	2.9	5.1	64
Total staff time required (hours)	4.0	1.4	2.6	65
Putting up a launch page or corner site				
Total time required (hours)	1.3	0.6	0.7	56
Total staff time required (hours)	102	25	77	75
Delivering a new brand or country site				
Total time required (hours)	15.5	5.3	10.2	66
Total staff time required (hours)	1,649	661	988	60

n = 6

Source: IDC, 2018

"AEM Sites allows us to manage images and PDF assets in conjunction with our web content, which is invaluable. We couldn't do it without AEM Sites."
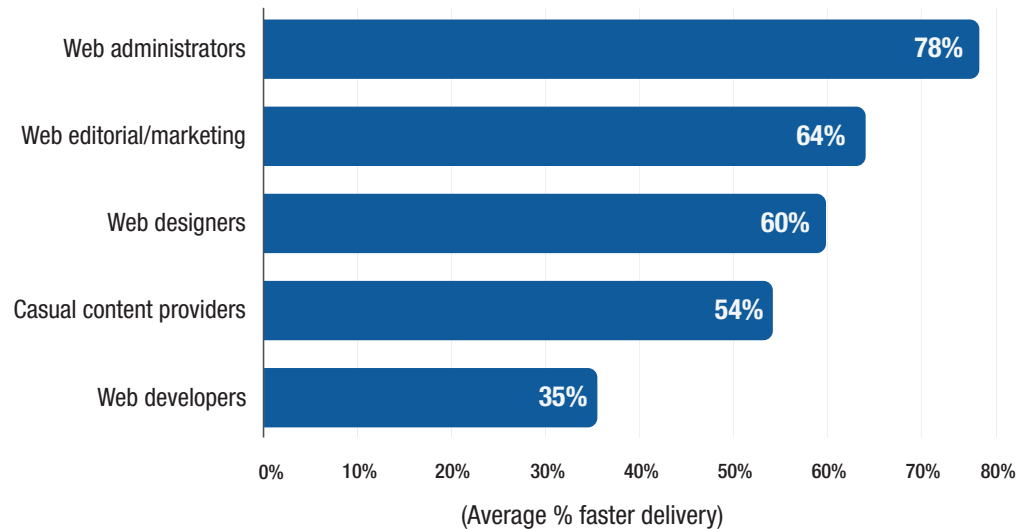
More Productive Teams Responsible for Creating Digital Experiences

Teams responsible for creating and delivering digital experiences across these organizations' websites and other content hubs have become more productive with AEM Sites. This means that they can deliver more content in support of digital experiences and work with digital content in a way that energizes and supports the business, which also frees up time for them to take on more projects. This is possible with AEM Sites because of the reduced time required to go through steps in content creation and the way updates are automatically pushed out to all other tagged web content sites and repositories. Similarly, when an image is created and put into the AEM Sites, the designer can update it, and changes will be distributed to other sites where the image is being used.

Addressing the improved manageability of digital content, including images, one survey respondent said: *"AEM Sites allows us to manage images and PDF assets in conjunction with our web content, which is invaluable. We couldn't do it without AEM Sites. For example, because our process has most of our images and downloadable assets being created outside of the web creation process, it's helpful to have those images created and put into a content management system where a web creator uses the image."*

These efficiencies free up these teams to do much more to support their businesses, especially in terms of content creation. Figure 1 shows the impact of AEM Sites on the amount of digital content delivered by teams. These are noteworthy increases for teams tasked with creating and packaging digital content that is incorporated into engaging, targeted digital experiences with these organizations' customers, partners, and employees.

FIGURE 1 Impact on Amount of Digital Content Delivered by Team Using AEM Sites

Team	Average % faster delivery
Web administrators	78%
Web editorial/marketing	64%
Web designers	60%
Casual content providers	54%
Web developers	35%

(Average % faster delivery)

Source: IDC, 2018

A variety of teams at these Adobe customers who create and deliver digital content for purposes of fueling digital experiences are more productive and efficient using AEM Sites. These teams include web designers, developers, and administrators, among others, along with significant numbers of casual content providers across teams. Survey participants said that AEM Sites enables increased productivity with capabilities such as:

- Centralized distribution of changes to content and graphics
- Minimization of duplicative efforts through reuse and streamlined processes
- Ability to better locate digital content
- Less time spent on creating digital content/experiences

In addition, content writers can build and publish pages directly, casual content contributors can participate in the content creation process much more easily, and developers can expand the scope of projects without additional hires. One interviewed organization emphasized the extent to which AEM Sites is freeing up staff time: *"The freeing up of resources with AEM Sites to focus on other things has an impact. Previously, in order to just get content published, it took so much of our resources."*

One survey respondent described the benefit of AEM Sites for productivity levels of certain teams: *"We'd need more people if we didn't have AEM Sites. For marketing, we'd have to double staff if we didn't have the platform … . And for graphic/web designers, that would be easily double."* Another participant described cross-team efficiencies of his organization's content teams, citing centralization as immensely

helpful: *"It's made our world better and is reflected in the 50% time savings for certain staff members."*

Table 4 shows significant productivity improvements for teams responsible for pushing content that underpins digital experiences that have resulted from the deployment of AEM Sites. On average, employees on these teams are almost one-quarter (23%) more efficient or productive with AEM Sites, which IDC calculates as having an annual value of $3.5 million per organization over three years ($15,482 per AEM Sites user).

TABLE 4 Impact on Teams Using AEM Sites

	Team Size with AEM Sites	Value of Increased Productivity (FTEs)	Efficiency/Productivity Benefit (%)
Web editorial/marketing	51	24	32
Web designers	12	4	23
Web developers	36	4	10
Web administrators	6	1	11
Casual content providers	114	33	22
Overall impact with AEM Sites	219	65	23

n = 6

Source: IDC, 2018

Improving Customer Engagement and Business Results

Study participants reported that the use of AEM Sites has increased customer engagement and improved business results. This is a direct result of the platform supporting the development and delivery of more robust, personalized digital experiences in less time. In this context, one survey respondent commented on the increase in traffic to its mobile sites that it attributed in large part to AEM Sites: *"In terms of the number of visitors, we've been consistently growing … . We're at about 12% mobile now. And I think that's changed as the result of AEM Sites because it's made delivery of content to mobile sites a lot easier."* The net result of these types of improvements to digital experiences is higher traffic to these organizations' sites; IDC calculates that site visits have increased by an average of 10% with AEM Sites, bringing these organizations an average of almost 1.4 million additional site visits per month (increasing traffic from 13.55 million visits per month to 14.94 million visits per month).

The business impact of AEM Sites for the companies surveyed can be traced to several factors:

- Increased traffic to websites, especially mobile sites
- Better digital experiences for customers and prospects
- More unified presentation of global and local content
- More timely, personalized, and optimized digital experiences

Commenting on the relationship between improved customer experience and business

"Everything has a ripple effect, so when you're putting out better content that's faster and more personalized, you're creating a better customer experience, which leads to an uptick in return users and new users. With AEM Sites, our customer engagement has increased by around 10% to 15% … . And we've increased our conversion rate from around 2% to 7%."

results, one survey respondent said: *"Everything has a ripple effect, so when you're putting out better content that's faster and more personalized, you're creating a better customer experience, which leads to an uptick in return users and new users. With AEM Sites, our customer engagement has increased by around 10% to 15% … . And we've increased our conversion rate from around 2% to 7%."* Table 5 presents revenue impacts of these improved experiences and interactions, with total additional revenue pegged at $1.99 million per year per organization over three years and total recognized revenue at $298,800 per year per organization over three years for purposes of the IDC model (total additional revenue of $2.24 million per year per organization and total recognized revenue of $335,300 per year per organization over five years).

TABLE 5 Business Operations and User Impact with AEM Sites

	Per Organization	Per AEM Sites User
Impact on site traffic		
Percentage increase in visits to sites per month	10% increase in visits	
Revenue impact and better addressing business opportunities		
Total additional revenue per year over three years	$1.99 million	$8,810
Total recognized revenue per year over three years*	$298,800	$1,321

* IDC applies an assumption that organizations recognize 15% of additional revenue for purposes of the model developed to express the value of AEM Sites.

Source: IDC, 2018

Efficient and Cost-Effective Digital Content Platform

In addition to the business and operational advantages described previously, AEM Sites is efficient to manage, requiring 61% less staff time. IDC puts the value of staff time efficiencies for deploying, managing, and maintaining the platform at an annual average of $80,300 per organization over three years ($355 per AEM Sites user).

AEM Sites also offers functionality that can reduce operational costs such as the ability to cost effectively use content across multiple geographical market sites, which is especially beneficial as organizations expand across markets. Commenting on this benefit, one survey respondent said: *"The Live Copy function of AEM Sites is useful. We can create a site and then roll it out to all of our countries because any given country is almost identical to another with the exception of a few pages here and there that get modified for local content. That's been a huge benefit. We've recently implemented the translation engine within AEM Sites and that's also been huge."* Study participants also mentioned the benefit of lower translation costs with AEM Sites as a driver of cost efficiencies. IDC puts the value of these types of digital experience-related cost savings at average of $40,900 per year per organization over three years ($181 per AEM Sites user).

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ROI Analysis

IDC based its ROI analysis on interviews with organizations that are using AEM Sites to create and deliver digital experiences. Based on these interviews, IDC has calculated the benefits and costs to these organizations of using AEM Sites. IDC used the following three-step method for conducting the ROI analysis:

1. **Gathered quantitative benefit information during the interviews using a before-and-after assessment of the impact of AEM Sites.** In this study, the benefits included staff efficiency and productivity related to the creation, management, and delivery of digital experiences, increased revenue, and cost reductions.

2. **Created a complete investment (three- and five-year total cost analyses) profile based on the interviews.** Investments go beyond the initial and annual costs of using AEM Sites and can include additional costs related to planning, consulting, migrations, and staff or user training.

3. **Calculated the ROI and payback period.** IDC conducted a depreciated cash flow analysis of the benefits and investments for these organizations' use of AEM Sites over three- and five-year periods. ROI is the ratio of the net present value (NPV) to the discounted investment. The payback period is the point at which cumulative benefits equal the initial investment.

Table 6 presents IDC's analysis of the benefits and investment costs for study participants in using AEM Sites. IDC calculates that these Adobe customers will invest a discounted average of $2.03 million per organization over three years ($8,796 per AEM Sites user) or $2.55 million per organization over five years ($11,265 per AEM Sites user) and can expect to achieve benefits in return worth a discounted average of $9.09 million per organization over three years ($40,183 per AEM Sites user) or $15.24 million per organization over five years ($67,407 per AEM Sites user). These levels of benefits and investment costs would result in a three-year ROI of 348% and a five-year ROI of 498%, with breakeven occurring in 12 months on average.

TABLE 6 Three- and Five-Year ROI Analysis

	Three-Year per Organization	Three-Year per AEM Sites User	Five-Year per Organization	Five-Year per AEM Sites User
Benefit (discounted)	$9.09 million	$40,183	$15.24 million	$67,407
Investment (discounted)	$2.03 million	$8,796	$2.55 million	$11,265
Net present value (NPV)	$7.06 million	$31,207	$12.70 million	$56,141
Return on investment (ROI)	348%	348%	498%	498%
Payback period	12 months	12 months	12 months	12 months
Discount rate	12%	12%	12%	12%

Source: IDC, 2018

CHALLENGES AND OPPORTUNITIES

Digital experience management is a hotly contested market today, and Adobe continues to face competition from vendors both large and small. In favor of Adobe is its market share leadership in web content management, AEM Sites' large installed base, and the company's global sales and support organization and extensive partner network of agencies and systems integrators.

Adobe markets AEM Sites both as a component of Adobe Marketing Cloud and as a standalone offering (with or without AEM Assets). In opportunities where Adobe's competition is one of the large marketing cloud vendors, AEM Sites is an important differentiator as most of these vendors lack a web content management solution. In competitive situations focused specifically on experience delivery, Adobe must compete with pure-play web content/experience management vendors, most of them are repositioning their growing portfolios as digital experience platforms. Here, Adobe can leverage its market dominance in website analytics and its integrations between AEM Sites and other Adobe Marketing Cloud offerings, especially Adobe Target for personalization and optimization and Adobe Campaign.

We can expect to see digital experience platforms continue to evolve as new requirements emerge. Headless content management (and content as a service) is a hot topic today among developers writing custom apps using popular JavaScript frameworks. The integration of content and commerce is another area of opportunity. Similarly, we can expect to see growing use of AI, machine learning, and predictive analytics to optimize the digital experience and transform the customer journey. Adobe must continue to invest and innovate in these areas to remain competitive.

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CONCLUSION

A great customer experience increasingly depends on the organization's ability to deliver engaging digital experiences across the many connected devices and channels through which today's customers wish to interact and transact. Delivering an omni-channel experience that is localized, contextualized, and — increasingly — personalized is a tremendous challenge. Organizations need a modern digital experience platform to meet both current and future requirements.

IDC's research demonstrates the impact that Adobe Experience Manager Sites is having on a sample of Adobe customers using it to create, manage, and deliver digital experiences. These organizations are leveraging AEM Sites to make their digital experience teams significantly more productive, meet growing demands in a cost-effective and cost-efficient manner, and improve customer engagement by delivering high-quality, engaging, and increasingly personalized digital experiences.

APPENDIX

IDC's standard ROI methodology was utilized for this white paper. This methodology is based on gathering data from organizations currently using AEM Sites as the foundation for the model. Based on interviews with these study participants, IDC performs a three-step process to calculate the ROI and payback period:

- Measure the savings associated with using AEM Sites in terms of staff efficiency and productivity benefits related to digital content creation, use, and management; increased revenue; and cost reductions.

- Ascertain the investment made in deploying and using AEM Sites.

- Project the costs and savings over three- and five-year periods and calculate the ROI and payback for the deployed solution.

IDC bases the payback period and ROI calculations on a number of assumptions, which are summarized as follows:

- Time values are multiplied by burdened salary (salary + 28% for benefits and overhead) to quantify efficiency and manager productivity savings. For purposes of this analysis, IDC has used its standard Business Value study assumptions of an average fully loaded $100,000 per year salary for IT staff members and an average fully loaded salary of $70,000 for non-IT staff members. IDC assumes that employees work 1,880 hours per year (47 weeks x 40 hours).

- The net present value of the five-year savings is calculated by subtracting the amount that would have been realized by investing the original sum in an instrument yielding a 12% return to allow for the missed opportunity cost. This accounts for both the assumed cost of money and the assumed rate of return.

These organizations are leveraging AEM Sites to make their digital experience teams significantly more productive, meet growing demands in a cost-effective and cost-efficient manner, and improve customer engagement by delivering high-quality, engaging, and increasingly personalized digital experiences.

Further, because IT solutions require a deployment period, the full benefits of the solution are not available during deployment. To capture this reality, IDC prorates the benefits on a monthly basis and then subtracts the deployment time from the first-year savings.

Note: All numbers in this document may not be exact due to rounding.

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