

Magic Quadrant for Digital Experience Platforms

Published 29 January 2020 - ID G00386613 - 35 min read

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Customers' growing expectations for digital experiences make DXP adoption an urgent necessity for global organizations, but the market is fragmented and still evolving. This Magic Quadrant will help application leaders responsible for digital experiences identify vendors suited to their needs.

Market Definition/Description

A digital experience platform (DXP) is an integrated and cohesive piece of technology 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 customers, including consumers, partners, employees, citizens and students.

This technology can thrive in 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.

Magic Quadrant

Figure 1. Magic Quadrant for Digital Experience Platforms



Source: Gartner (January 2020)

Vendor Strengths and Cautions

Acquia

[Acquia](#) is based in Boston, Massachusetts, U.S. Its DXP is the Acquia Open Digital Experience Platform. This platform includes capabilities for content management, personalization and customer journey management, among other things. It is available as a platform as a service (PaaS), and some elements are available as software as a service (SaaS). Acquia’s DXP is often used for B2C and B2B use cases.

Strengths

- Acquia demonstrates a solid understanding of the DXP market. This is backed by a vision for

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- The open-source community behind Acquia is broad and vibrant. It contributes to the success of the web content management (WCM) capability of Drupal, which is part of the foundation of Acquia's DXP.
- Acquia has invested in delivering a more rounded DXP offering. Its acquisitions of Mautic and Cohesion, which give it digital marketing capabilities and a low-code site builder, respectively, reflect the market's demands.

Cautions

- Analytics, commerce-related and digital asset management (DAM) capabilities remain underdeveloped in Acquia's DXP stack. They lack the depth and breadth offered by other vendors in this market.
- Acquia's market presence and brand recognition are improving, but potential customers still do not always understand the benefit of using Acquia's DXP, rather than open-source Drupal.
- Acquia's acquisition by Vista Equity Partners, a private investment firm, in September 2019 introduces uncertainty about the future state of the vendor and its product roadmap.

Adobe

[Adobe](#) is based in San Jose, California, U.S. Its DXP is the Adobe Experience Cloud, which includes analytics, personalization, artificial intelligence (AI) and other capabilities. Adobe has a global presence in terms of its internal capacity, partners and system integrator channel. Its DXP is most often used for B2C use cases, and to a lesser extent for B2B.

Strengths

- Adobe has a strong vision for how to provide solutions that support best-of-breed digital marketing and customer experiences, especially for B2C use cases. It appeals to organizations that are high on the digital business maturity curve.
- Adobe has created the Adobe Experience Cloud to unify underlying infrastructure and bring together services, applications, APIs and integration of customer data.
- Adobe's ecosystem gives it a significant advantage by encompassing design agencies, system integrators, and marketing and advertising agencies. It offers customers a wide choice of implementation and strategy partners.

Cautions

- Premium prices and complexity of implementation and usage remain challenges for Adobe's customers. Organizations evaluating Adobe must examine not just its suitability from a technology standpoint, but also the total cost of ownership over multiple years.

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with tools for sales, field, supplier, partner, reseller and customer service experiences.

- To take full advantage of Adobe's DXP, many organizations may need multiple components of the complex Adobe Experience Cloud suite. This may require additional internal resources, as well as contracting of external resources, to surmount a steep learning curve.

Bloomreach

Bloomreach is based in Mountain View, California, U.S., but also has a presence in Europe and Asia/Pacific. Its DXP is called Bloomreach Experience (brX). It is available as a hybrid cloud offering (some elements as SaaS, others as PaaS) and is most often used for B2B and B2C use cases. Bloomreach focuses on positioning its DXP as a front end for digital commerce scenarios.

Strengths

- Bloomreach has developed a technology partner channel with many best-of-breed digital commerce vendors, such as commercetools, Elastic Path and Salesforce. Integrations with these vendors offer customers flexibility through an API-first/headless approach.
- Bloomreach's technology makes pragmatic use of AI for search, personalization and product recommendation. It is well-suited to commerce-driven scenarios.
- Bloomreach is making progress in its core regions of operation by growing its channel of implementation partners. This offers more choice to customers looking for a system integrator or digital agency to help conduct an implementation.

Cautions

- Bloomreach's strategy focuses on commerce-driven use cases, with its AI-enabled search and merchandising solutions at the core of its DXP. Customers looking for a DXP for scenarios that are not commerce-driven should carefully examine Bloomreach's roadmap to assess its ability to align with, and support, a more horizontal digital experience strategy.
- Awareness of the Bloomreach brand remains low among Gartner clients. Bloomreach does not often appear on DXP shortlists or longlists seen by Gartner, even when it would be a good fit.
- Bloomreach's DXP is a hybrid cloud solution, with some parts being SaaS and others PaaS. This vendor's transition to a holistic, cloud-native architecture remains a work in progress, and there is comparatively little customer adoption of this product, due to its nascency.

CoreMedia

CoreMedia is based in Hamburg, Germany, and has offices in the U.K. and the U.S. Its DXP is the CoreMedia Content Cloud. CoreMedia has a strong focus on retail and consumer brands, as well as telecommunications, manufacturing and media companies. Its DXP is available as a cloud

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Strengths

- CoreMedia provides productized integration connectors to best-of-breed digital commerce, DAM, analytics and marketing automation platforms via its Hubs functionality. This makes it easier for customers to take advantage of the prebuilt connectors to common adjacent systems.
- CoreMedia has improved its multiexperience strategy with native capabilities for hybrid headless content as a service (CaaS) and digital experience delivery to digital signage and virtual-reality channels.
- CoreMedia's client base is broadening, with the addition of a range of new B2B and B2C customers.

Cautions

- CoreMedia focuses strategically on commerce-driven scenarios involving content-led, commerce-led, hybrid and headless approaches. Organizations looking for more horizontal and industry-agnostic scenarios should carefully examine CoreMedia's strategy and roadmap to ensure alignment with horizontal DXP requirements.
- CoreMedia relies heavily on partnerships with HCL, Salesforce and SAP for digital commerce capabilities, and requires tight integrations and use of their prebuilt connectors in commerce-led architectures.
- CoreMedia is known mostly in Europe. It has fewer partners outside that region, and is rarely shortlisted by Gartner clients. Its growth focus remains North America, where it has had some success, but CoreMedia's DXP remains less widely adopted around the world than many of its competitors' offerings.

Crownpeak

Crownpeak is based in Denver, Colorado, U.S., and has offices in other parts of the U.S., as well as some presence in Europe. Its DXP is the Digital Experience Management (DXM) platform, which offers experience management, as well as adjacent capabilities for consent management, compliance, governance and security. Crownpeak is often considered by organizations in financial services, consumer industries, and the pharmaceuticals and healthcare sectors.

Strengths

- Crownpeak offers transparent pricing. Its low barrier to entry enables customers to increase in terms of volume and complexity at their own pace.
- Crownpeak's multitenant SaaS model often appeals to midsize organizations that have few internal IT resources to support cloud infrastructures and complex application development.

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Cautions

- Crownpeak's focus on content publishing and data governance can deter customers looking at the larger picture of DXP scenarios and requirements.
- Crownpeak is struggling to build awareness of its brand. Even in clear-cut SaaS scenarios, where it might be a good fit, Crownpeak rarely appears on the shortlists of Gartner clients.
- Crownpeak's partner ecosystem is limited, compared with those of other vendors in this Magic Quadrant. Although Crownpeak is working to expand its partner channel, prospective customers may find that resources to support implementation are scarce, as are technological alliances.

Episerver

[Episerver](#) is headquartered in Nashua, New Hampshire, U.S., and Stockholm, Sweden, and is present across EMEA and parts of Asia/Pacific. Its DXP is the Episerver Customer-Centric Digital Experience Platform. It is available in the cloud as PaaS and SaaS. Episerver is best known for B2C use cases, but its DXP can be deployed in a variety of scenarios.

Strengths

- Episerver has a good understanding of the DXP market. This understanding is supported by its progress in delivering broader digital experience and CX capabilities for, for example, digital commerce, personalization, AI, content delivery, customer journey management and analytics.
- Episerver is increasing its mind share and growth in the DXP market, especially for B2C and B2B use cases.
- Episerver's transparent pricing and packaging readily align with business value. Its pricing strategy appeals to large enterprises and growing midsize organizations.

Cautions

- Compared with some of its competitors, Episerver lags behind in terms of market visibility and brand recognition. This is especially the case with large organizations, although we have seen some improvement.
- Given Episerver's focus on the CX, the employee experience and the B2E use case are not Episerver's strongest suit. This is despite Episerver having some B2E customers that focus on intranets and marketing and sales portals, and a connector to Microsoft Office 365.
- Although Episerver is good at web-centric experience delivery, its multiexperience and hybrid headless CaaS capabilities are still developing in terms of covering a wide variety of channels and touchpoints across customer journeys.

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Kentico Software is based in Brno, Czech Republic. Its DXP is the Kentico Enterprise Marketing Suite (EMS). It is available both on-premises and in the cloud. Kentico's DXP is used by midsize organizations for B2C, B2B and B2E scenarios.

Strengths

- Kentico EMS is a well-rounded, midtier, prepackaged DXP. It has a variety of core capabilities, such as content management, campaign management, analytics, optimization and personalization.
- Kentico offers a low barrier to entry in terms of price. Many midsize organizations find its relatively low price appealing and manageable.
- Kentico typically presents less complexity in terms of the deployment and capabilities of its DXP than some other vendors in this Magic Quadrant. This can shorten the time to value for its customers.

Cautions

- Some reference customers for Kentico, whom Gartner surveyed for this Magic Quadrant, stated that they found the vendor's dual-product strategy confusing. In addition to Kentico EMS, the vendor also offers Kentico Kontent, a separate, cloud-based product with hybrid headless CaaS capabilities (until recently it was called Kentico Cloud). Without Kentico Kontent, Kentico EMS may prove limiting to some customers. The dual-product strategy weakens Kentico's multichannel support, as both products are required for multiexperience scenarios.
- Organizations using Kentico for complex scenarios may outgrow it and encounter limitations in terms of scalability and extensibility, due to the software's scope and features.
- Kentico EMS's customer journey mapping and customer data management capabilities are minimal. Additionally, preintegrated connectors to common best-of-breed solutions are basic and require customization.

Liferay

Liferay is based in Diamond Bar, California, U.S., but also has a presence in Latin America, EMEA and Asia/Pacific. Its DXP is the Liferay Digital Experience Platform, which has content management, analytics, digital commerce and other capabilities. Organizations use it for a broad range of B2C, B2E and B2B use cases.

Strengths

- Liferay has a good understanding of the DXP market. Its product strategy and packaging suit customer, partner and employee experience use cases.
- Customers benefit from Liferay's active open-source community, which continuously

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- Liferay offers strong capabilities for extensibility and application integration, which appeals to IT buyers.

Cautions

- Given its engineering roots, Liferay targets IT buyers, but struggles to appeal to business and marketing buyers.
- Liferay is in the process of moving from a primarily on-premises installed base and strategy to its DXP Cloud product, which is comparatively new and unproven, and, so far, lacking in adoption, compared with products from other vendors. Organizations considering Liferay DXP Cloud should carefully evaluate the vendor's cloud migration strategy, as well as its pricing.
- Although Liferay can address B2C, B2E and B2B DXP use cases, its support for B2C is the weakest of the three. Organizations with mature digital marketing requirements may find Liferay's customer-centric functionality limiting, as the vendor is lacking in terms of capabilities such as customer journey mapping, optimization, AI, customer data management and multiexperience support.

OpenText

[OpenText](#) is headquartered in Waterloo, Ontario, Canada. Its DXP is the OpenText Experience platform, which has a wide variety of capabilities, such as WCM, A/B testing, DAM and customer communications management (CCM). OpenText has a global presence and customers in a variety of vertical markets, including manufacturing, government, retail, financial services and insurance. OpenText's DXP is most often employed for B2C and some B2B use cases.

Strengths

- OpenText Experience can be deployed in a variety of public clouds, including those of Amazon, Google and Microsoft.
- OpenText's CCM and DAM capabilities, provided by integrating long-standing products into OpenText Experience, may benefit organizations looking to use a DXP to manage digital and media assets and customer communications.
- OpenText's DXP is well-suited to supporting logged-in, authenticated experiences, particularly for B2B use cases, thanks to its identity management, security, account services and integration capabilities.

Cautions

- Most of OpenText's installed base uses its technology on-premises and finds it hard to migrate to the cloud due to a lack of guidance from the vendor, as well as internal constraints on modernizing the relevant architecture. Many customers have chosen a hybrid mode — partly

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- Gartner rarely sees OpenText on DXP RFPs and shortlists, because this vendor focuses on selling to its existing customers.
- OpenText's multilayer DXP product-packaging strategy may make it difficult for customers to navigate its product portfolio and select the right capabilities to form a cohesive platform. Not all of OpenText's capabilities, such as those for contact centers, print and voice of the customer, are relevant to all DXP use cases.

Oracle

Oracle is based in Redwood Shores, California, U.S. and has a global presence. Its DXP is called Oracle CX Cloud, which, with Oracle Content and Experience Cloud at its core, has capabilities such as content and experience management, AI, analytics, optimization and security. Oracle's DXP is often deployed in the financial services, education, retail, manufacturing and travel sectors, mainly for B2C and B2B use cases.

Strengths

- Oracle offers guidance to customers to help them pick the right set of products and services from its DXP. Partners are helped in a similar way.
- Oracle continues to invest in the content-centric features of its DXP. Recent developments involve the use of machine learning and natural language generation for content creation, image recognition and tagging.
- In response to market feedback, Oracle has simplified its pricing and packaging with the aim of reducing its licensing complexity and dispelling customers' confusion.

Cautions

- Feedback from surveyed Oracle reference customers indicates that its DXP's native personalization capabilities may be limiting. Personalization requires integration with other Oracle applications, including Oracle Maxymiser, plus segmentation tools such as Oracle BlueKai and Oracle CX Audience, at extra cost.
- Oracle's omnichannel delivery capabilities are evolving, but Oracle is not on a par with other vendors in this Magic Quadrant when it comes to providing efficient hybrid headless CaaS capabilities for an API-first approach.
- Oracle's transition to the cloud is lagging behind those of other vendors in this market. It continues to support legacy on-premises Oracle WebCenter Sites and Portal customers, and is improving the content management experience by layering parts of a customer engagement hub onto its on-premises solution. Reference customers, especially those that have invested heavily in Oracle products, indicated that clear guidance about Oracle's hybrid cloud migration strategy was lacking as they struggled to move directly from on-premises deployments to

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Salesforce

Salesforce is based in San Francisco, California, U.S. It has a global presence and serves vertical markets such as retail, manufacturing, healthcare and financial services. Its DXP is called the Salesforce Community Cloud, a SaaS product deployed primarily for B2B and B2C use cases.

Strengths

- Salesforce's vision and emerging initiative to augment its digital experience capabilities with its Customer 360 product line are compelling. Its goal is to connect customer data and customer profiles across a variety of data points via MuleSoft, both within and outside the Salesforce ecosystem.
- Salesforce's AI strategy with Salesforce Einstein is pragmatic and applicable to a variety of digital experience areas, such as personalization and optimization.
- Salesforce's partner ecosystem is one of the largest in the market. Coupled with a strong Trailblazer community of developers, it offers customers a varied choice of technology and system integrators.

Cautions

- Salesforce Community Cloud is best suited to customers with substantial existing investments in Salesforce technologies, because of packaging and cost concerns.
- Salesforce's DXP strategy lacks cohesion, as the vendor places significantly less focus on its DXP product than its competitors do on theirs. Its offering is spread across Salesforce Community Cloud, Content Management System (CMS), Lightning Platform and Einstein products, as well as adjacent Marketing and Sales Clouds, which leads to ambiguity and uncertainty about the vendor's DXP vision.
- Salesforce CMS, a service within its DXP for content management, entered beta more than a year ago and took approximately a year to reach general availability. Some Salesforce customers were confused by pressure from Salesforce's sales representatives to adopt this product as a fully-featured, enterprise-ready content management solution when it was still in beta and lacking a feature set equal to those of other vendors.

SAP

SAP is based in Walldorf, Germany. It has a global presence and serves multiple industries, such as life sciences, manufacturing, healthcare, retail and financial services. Its DXP is the SAP Cloud Platform, which has the SAP Cloud Platform Portal at its core. SAP's DXP can be used for B2E and some B2B and B2C use cases.

Strengths

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and mostly used by, organizations that already have multiple SAP business applications. Large organizations with complex use cases and large IT teams may find SAP's approach appealing.

- The SAP Cloud Platform has a broad range of digital experience capabilities, especially for B2E use cases. Differentiating features include mobile software development kits, machine learning capabilities and SAP Conversational AI.
- SAP Cloud Platform and the digital experience capabilities within it are cloud-agnostic, so they can be deployed on various public cloud infrastructures.

Cautions

- SAP rarely appears in Gartner clients' RFPs and shortlists for a DXP provider.
- SAP has very limited native content management capabilities, suitable for the creation of basic content and pages. For more advanced content management functionality (which costs extra), SAP relies on third-party WCM vendors via the SAP App Center.
- Organizations with enhanced digital marketing requirements for B2C use cases will likely require an integration between SAP Cloud Platform and C/4HANA (or third-party best-of-breed tools) for capabilities like analytics, personalization, customer journey mapping and customer data management.

Sitecore

[Sitecore](#) is based in San Francisco, California, U.S., and has a presence in Europe, the Middle East and Asia/Pacific as well. Its DXP product is the Sitecore Experience Platform, which has capabilities such as content management, personalization and optimization. Sitecore's DXP is most often deployed for B2C, and some B2B, use cases in the healthcare, retail, manufacturing and hospitality sectors.

Strengths

- Sitecore's DXP offers a broad set of digital experience capabilities for CX-centric scenarios and B2C use cases in particular. Organizations with sophisticated digital marketing requirements and a solid CX strategy often find it appealing.
- Sitecore's hybrid headless capability, enabled by Sitecore JavaScript Services (JSS), is maturing. It gives users the ability to deliver digital experiences to a variety of channels in a more agile fashion.
- Sitecore continues to expand its AI and machine learning capabilities, including its processing engine, Sitecore Cortex, which has automated optimization, content tagging and other features.

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about the different packages and their respective value propositions. Gartner has also received feedback from multiple sources that Sitecore is aggressively trying to move its on-premises customers to cloud subscriptions.

- Sitecore lags behind its competitors in terms of cloud strategy. Its transition to the cloud is ongoing, with its managed services being only on version 1, and many capabilities that customers want are lacking. Many of Sitecore's on-premises customers identify multiple difficulties – ranging from technical problems to price – about moving to the cloud.
- Some Sitecore customers struggle with product complexities and have limited ability to use its product to the full. Some reference customers for Sitecore expressed concerns about a lack of customer success support and guidance. Others indicated that Sitecore's high degree of extensibility and customization may make it harder to manage over time.

Squiz

Squiz is based in Sydney, Australia, and has a smaller presence in parts of Europe and the U.S. The Squiz Digital Experience Platform includes cloud, content management, search, digital marketing, employee and citizen experience capabilities. It is used primarily for B2C and B2E use cases, and to a lesser extent for B2B.

Strengths

- Squiz has transitioned from individual product lines to a unified single DXP complemented by a unified roadmap and product team. Its focus is on the CX and digital government, student and employee experiences.
- Squiz is at an early but promising stage with its DXP Datastore (a content delivery platform integrated into the DXP), and with its Content API for hybrid headless experience delivery.
- Along with application and marketplace layers, Squiz's DXP has a digital integration platform as a service (iPaaS) layer for integrations via APIs, with "drag and drop" integration flows.

Cautions

- Squiz focuses strongly on student and citizen digital experiences, developments for which dominate its roadmap. Organizations evaluating Squiz outside the higher education and government sectors should carefully examine how well its roadmap aligns with, and supports, a more horizontal DXP strategy.
- Squiz's brand recognition outside Australia remains limited. Consequently, potential customers outside Australia often do not include Squiz on their shortlists of DXP vendors.
- Squiz has invested less heavily than other DXP vendors in a global ecosystem of implementation, technology and agency partners. Decision makers should therefore ensure

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Vendors Added and Dropped

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

Added

None

Dropped

- IBM
- Microsoft
- SDL

Inclusion and Exclusion Criteria

Business Criteria

- **Revenue:** Each vendor's DXP offering must have generated revenue of at least \$15 million (U.S. dollars) in the vendor's financial year (FY) 2018. Revenue included licenses and/or cloud subscription and maintenance revenue. Professional services, training and infrastructure/hosting revenue was excluded. The vendor must have acquired at least 10 net new customers in its FY 2018.
- **Market presence:** Each vendor had to have been marketing and selling its DXP product for at least two years.
- **Geographic coverage:** Each vendor had to have a market presence in at least three of the following regions: North America, Latin America, Europe, Middle East and Africa, Asia/Pacific and Japan. Regional market presence was represented by dedicated offices and employees and/or partners in a region. At least 20% of a vendor's revenue had to derive from customers based in at least two of these regions.
- **Partner ecosystem:** Each vendor had to demonstrate the ability to deliver implementation support for customers via an extensive and experienced partner ecosystem containing at least 10 implementation agencies and system integrators.
- **Vertical market coverage:** At least 20% of each vendor's revenue had to derive from organizations in at least three of the following vertical markets: manufacturing, government, retail, financial services, insurance, healthcare, consumer goods, education, energy and utilities,

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- **Ecosystem activity and market interest:** Each vendor had to have an active ecosystem around its DXP, as evidenced by Gartner's assessment of the market, including factors such as community forums, books and seminars, as well as client, partner and channel activity (by IT services firms, system integrators, design agencies and advisory firms). Gartner also considered the degree of market interest in each vendor's DXP, as measured by the number of end-user clients' inquiries to Gartner analysts made via a Gartner call center or at Gartner conferences.
- **Go-to-market approach:** Each vendor's go-to-market approach had to demonstrate clarity, quality, creativity and efficacy in relation to the positioning of, and marketing, messaging, pricing and packaging for, its DXP(s). We examined aspects such as thought leadership, product marketing and product management public presentations, events, customer experience, digital presence, social media presence and sentiment, partner channels, word of mouth and sales strategy.

Product Criteria

- **Product packaging:** Each DXP's core had to be available as a cohesive, unified, integrated product, under one product name.
- **Use-case support:** Each DXP had to be able to deliver, as a cohesive, unified product, at least two of the three primary use cases, namely B2C, B2B and B2E.
- **Cloud support:** Each DXP had to be available for cloud deployment as PaaS or SaaS or as some form of cloud managed service.
- **Product capabilities:** Each DXP had to:
 - Have native 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.
 - Natively provide rich, extensible, interoperable and well-documented production/consumption APIs.
 - Natively support multichannel presentation orchestration and experience delivery via hybrid and/or headless capabilities.
 - Natively provide account service capabilities, including registration, login and password management with authentication and access control, via a native or integrated tool.
 - Provide customer data management capabilities via a native or integrated customer data platform.

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- Provide personalization, analytics and optimization capabilities via a native or integrated tool.
- Provide practical, applied AI via a native or integrated tool.

Evaluation Criteria

Ability to Execute

Enterprises evaluating DXPs have wide-ranging requirements for various 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 goods and services that compete in and/or serve the defined market. Included for consideration are current product and service capabilities, quality, feature sets, skills and so on. Goods and services 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: For this criterion, Gartner assesses a vendor's overall financial health, as well as the financial and practical success of the relevant business unit. Gartner also considers the vendor's likelihood of advancing the state of the art for DXPs within its product portfolio. Assessments are made of the organization's cash and equity position, management and financial strategy.

Sales execution/pricing: This criterion relates to a vendor's capabilities in all presale activities and the structure that supports them. Included are deal management, pricing and negotiation, presale 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 the clarity, quality, creativity and efficacy of programs designed to convey a vendor's message 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.

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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. Gartner's assessment covers the quality of supplier-buyer interactions, technical support and account support. Other aspects assessed include ancillary tools, documentation, customer support programs, availability of support communities, and service-level agreements.

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

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	High
Customer Experience	High
Operations	Medium

Source: Gartner (January 2020)

Completeness of Vision

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

Market understanding: This criterion assesses a vendor's 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 highest degree of DXP vision listen and respond to buyers'

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Marketing strategy: This criterion looks for clear, differentiated messaging that is communicated consistently internally and externalized through social media, advertising, customer programs and positioning statements. An effective marketing strategy is crucial to articulate the distinction between 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 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 are comprehensive, integrated and rationalized, yet interoperable. Product and solution packaging are important considerations.

Business model: This criterion assesses the design, logic and execution of a vendor's business proposition. Its business model should be aligned strategically with the motivations and initiatives of existing and prospective DXP customers.

Vertical/industry strategy: This criterion assesses a vendor's strategy for directing resources (for sales, products and development), skills and products to meet the specific needs of individual market segments, including industries. Vendors must demonstrate versatility by means of capabilities and expertise in various industries.

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, machine learning, knowledge graphs, context awareness, the Internet of Things and user experience design to offer differentiated, continuous and engaging digital experiences.

Geographic strategy: This criterion assesses a vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies other than its "home" geography, either directly or through partners, channels and subsidiaries, as appropriate for the geography and market.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High

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Evaluation Criteria ↓	Weighting ↓
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (January 2020)

Quadrant Descriptions

Leaders

Leaders have ample ability to support a variety of DXP use cases and consistently meet customers' needs over substantial periods. Leaders have delivered significant product innovation in pursuit of DXP requirements, and have been successful in selling to new customers across industries.

Challengers

Challengers demonstrate significant Ability to Execute, with strong businesses and customer bases, as well as products that suit current demands. However, they lack the vision of Leaders and Visionaries, and may therefore struggle to fully satisfy future demands from a technology or business perspective.

Visionaries

Visionaries are forward-thinking vendors that demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. But they are lacking in terms of some aspects of their offerings, service and support, and/or business and partner ecosystems, which impairs their Ability to Execute.

Niche Players

Niche Players focus on limited DXP deployment scenarios, have limited geographic presence outside their home market, and/or focus on a narrow set of industries.

Context

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This Magic Quadrant evaluates vendors that met Gartner's inclusion criteria for the DXP market. It is intended to aid selection decisions about vendors and products. Application leaders in charge of digital workplace applications focused on digital experience and CX initiatives should:

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

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

Market Overview

DXPs act as "centers of gravity" in a complex, extensive and interconnected technology landscape. Organizations need to deliver highly contextualized experiences – not just simple websites and mobile apps – for an increasing variety of modalities and channels across customer journeys.

Many DXP offerings derive from portals and WCM systems. The criticality of interoperability and integrations with adjacent technologies to support various parts of a CX strategy is what drives this market's evolution.

Market Trends

Development of a chasm between product- and platform-oriented vendors

Many DXP offerings derive from WCM systems. Some WCM vendors are developing DXPs, and may offer DXPs alongside separate WCM products (see "[Magic Quadrant for Web Content Management](#)"). However, some traditional WCM vendors are not keeping pace with developments in the DXP market and are therefore falling behind the market's demands with their more product-oriented solutions. At the same time, vendors with more platform-oriented solutions are innovating rapidly and increasing their Ability to Execute. These market dynamics are creating a "chasm," in terms of Ability to Execute and Completeness of Vision, between the more platform-oriented vendors in the Challengers and Leaders quadrants and the more product-oriented vendors in the Visionaries and Niche Players quadrants.

Evolution of hybrid headless CaaS to support multiexperience strategies, increase agility and shorten time to market

The concept of headless content management is fundamental to digital experiences. However, to address growing customer demands for better experiences, hybrid headless CaaS is more

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headless mode or in traditional front-end/content delivery mode, based on the same back-end/content repository. Content can be accessed as a service, exposed via APIs and delivered to any channel or device throughout a customer journey. The differentiating feature is that the content is almost always componentized, granular and atomic-based.

Growing requirements for digital optimization and/or digital transformation drive DXP selection

Global organizations are looking to buy DXPs because they need to become digital businesses and provide better customer experiences, whoever their customers may be – consumers, citizens, students, partners, resellers or employees. Some young organizations on the path toward digital optimization are looking for simpler, leaner DXPs that can grow with them; in other cases, they may choose WCM products as entry points to the larger field of digital experience management. Organizations that are highly mature in their CX strategies are looking for DXPs that can serve as “connective tissue” throughout their CX technology stack.

Evolution of cloud DXPs beyond infrastructure requirements

Cloud-based DXPs are now commonplace. Leading organizations are withdrawing from basic IaaS/hosted-service-related discussions about whether a DXP resides in a particular cloud, or constitutes SaaS or PaaS, because the driving force behind developments is now innovation, rather than infrastructure. DXP buyers are increasingly looking for more cloud-native DXP technologies that are built on mesh app and service architecture (MASA), microservices, and serverless and containerized architectures. They want to invest in cloud-native solutions to deliver digital experiences faster, enable developer agility, application scalability and resilience, reduce technical debt, and benefit from highly scalable predictive analytics, advanced personalization, machine learning and other forms of AI. However, given the relative immaturity of microservice-oriented DXP, buyers should know that inappropriate use of microservices architecture leads to unnecessary application complexity, which can negate desired benefits.

Growing importance of API-driven integrations

As DXPs are designed to be woven into existing enterprise architecture, organizations are increasingly focusing on API design, management and mediation capabilities, either within DXPs or outside them (in the latter case by evaluating which best-of-breed API management tools DXPs can best be paired with). Application leaders should evaluate the different types of integrations required for their business and weigh the pros and cons in relation to the capabilities they want to enable. Different types of integration will support different DXP requirements, and will require different levels of effort to implement. Some DXPs come with capabilities for DevOps and continuous integration/continuous delivery (CI/CD) pipeline management to assist integration and deployment.

Evaluation Criteria Definitions

Ability to Execute

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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

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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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