

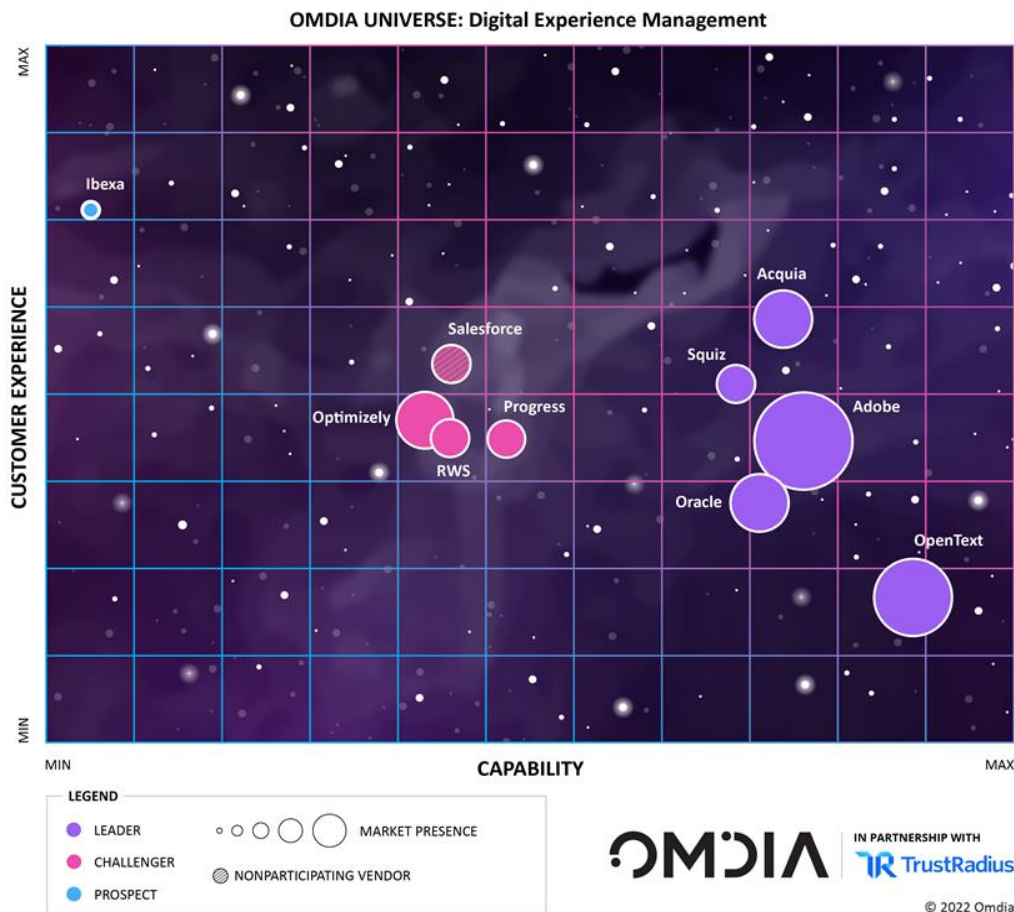
Selecting a Digital Experience Management Platform Solution, 2022–23

Summary

Catalyst

The rate of increase in online sales has accelerated as evolving work practices mean fewer employees are office based and visiting city centers. Companies need to be more creative in the way they deliver content to customers. Personalization has become more important in facilitating engaging experiences through recipients’ preferred channels to attract and retain customers. This report compares solutions from leading digital experience management (DXM) vendors to help decision makers draw up a shortlist of products to consider.

Figure 1: The Omdia Universe for Digital Experience Management Platforms



Source: Omdia

Omdia view

COVID-19 has done more to change both work and shopping habits than any other event in recent times. With more people now working from home on a regular basis and fewer workers venturing into city centers on weekdays, organizations have needed to adapt the ways in which they support remote workers and how they market goods to customers. One early impact of the pandemic was the fact that it forced enterprises to accelerate digital transformation initiatives. The drivers and technology priorities reported in recent Omdia Enterprise Insights show that 28% of respondents are very advanced with their digital transformation strategies in omnichannel customer engagement, with nearly 29% in progress and almost 15% in the early stages. At the same time, many enterprises are having to do more with less as budgets are lower due to the pandemic—more than 50% of organizations anticipating no change in budget or a decrease between 2021 and 2022.

Many enterprises are prioritizing DXM modernization with more than 30% of Enterprise Insight respondents having strategic investment planned over the next 18 months and a further 36% with minor investment planned. In addition, 30% of organizations have strategic investment plans for digital asset management over the same period with a further 34% planning minor investment. This demonstrates the importance of having the right technologies in place to manage digital experiences with customers.

With more companies adopting digital sales models, competition has intensified, particularly for early adopters of digital marketing. Personalization has become key in ensuring that the right content is delivered to the right person at the right time through the most appropriate channel. This need to support multiple channels is driving the adoption of headless DXM platforms that separate the content from the applications that use it, theoretically future-proofing the technology against new channels that may emerge in the future.

One area that has become more important is the management of digital assets, with enterprises having to develop new ways of showcasing products when face-to-face interactions have not been possible. Features such as spin sets to provide a 360-degree view of an item as well as video, 3D, and augmented and virtual reality are all features that can help to enhance the customer experience.

COVID-19 has also had an impact on working practices because enterprises have had to adapt from predominantly office-based staff to almost all employees working from home. This means that features such as collaboration have become much more important to DXM platforms in enabling users to collaborate remotely when they cannot collaborate in person. It also means that enterprises have to carefully consider the delivery model for their DXM platforms and applications. Most vendors have adopted a cloud-native or cloud-first strategy, with some offering a variety of cloud options. Cloud can be more secure than on-premises solutions because cloud providers adhere to very high security standards that not all enterprises can manage, and, generally, updates are much more frequent than for on-premises solutions, allowing users to take advantage of new features as soon as they are released.

Analyzing the digital experience management universe

Market definition

Omdia has defined DXM as being the technologies and tools required to create engaging and highly personalized customer experiences across multiple channels and devices. The capabilities required to achieve this include a web content or core repository to house and manage the content, analytics, DAM, online forms, developer tools, portals and social capabilities, AI, cloud capabilities, integration capabilities, and security compliance and governance as follows:

- **Web content management.** This category includes the repository to store and manage content as well as core features including: development tools to create websites; capabilities for creating, editing, reviewing, and publishing content; and features to ensure website accessibility and compliance. Although the web content platform is still largely used to create and manage websites, the repository can be used in a totally headless fashion as a content repository only, and a third-party WCM system can be deployed to build and manage websites.
- **Analytics.** Metrics collected about interactions between visitors and enterprises are covered in this category and include the ability to track everything from individual customer journeys across multiple devices and channels to the effectiveness of individual pages and items of content on a website.
- **DAM.** Capabilities provided to manage digital assets such as images, video, and audio files are included in this category. It includes management of the entire lifecycle of assets from import to retirement or archival.
- **Online forms.** This category covers the important area of developing online forms, the ease with which they can be completed, and the capabilities provided for processing them.
- **Capabilities for developers.** The provision of low- and no-code tools, components and widgets, and horizontal and vertical applications that are provided for developers to create applications that interact with content is covered by this category.
- **Portals and social capabilities.** This category includes portal, community, and social site capabilities and the social features they include. It also covers the ability to run marketing campaigns on social media sites.

- **AI.** How AI and machine learning (ML) capabilities are embedded throughout the product in areas such as web content management, analytics, DAM, online forms, and portals and social capabilities are covered in this category as well as how enterprises can use the capabilities provided in the platform when building their own applications.
- **Cloud capabilities.** The various options for cloud deployment are covered in this category including: the various cloud options available; which public clouds are supported; how the services are licensed and priced; the ease, cost, and speed of migrating content to the cloud; and cloud security.
- **Integration capabilities.** The methods by which the DXM can integrate with other applications are detailed in this category including: the availability of prebuilt connectors to common third-party applications including: analytics; DAM; enterprise resource planning (ERP); customer relationship management (CRM); marketing automation; and e-commerce solutions.
- **Security, compliance, and governance.** This category incorporates features and functions that help to ensure that content is secure, compliant, and managed appropriately adhering to governance guidelines.

Market dynamics

The continuing importance of the DXM market is reflected by the large number of vendors that play in the area, including: specialist vendors such as Acquia, Ibexa, Optimizely, and Squiz; vendors that also have content services platforms, such as OpenText and Oracle; and vendors that have products in other areas including Adobe, Progress, RWS, and Salesforce. OpenText and Oracle also fall into this last category. Finally, there are new entrants to the market such as Salesforce.

There continue to be acquisitions in the DXM space as vendors expand their capabilities. For example, in 2021 Acquia acquired the specialist DAM vendor Widen, which has strengthened its capabilities in this area and has also added product information management (PIM) capabilities to its portfolio. This has expanded its overall capabilities with the result that it has moved from being a challenger in the last DXM Omdia Universe in 2020 to being a leader in this report.

Optimizely has also made an acquisition and gone through a rebrand since the last report. As Episerver, it acquired Optimizely, an AI-based experimentation and optimization vendor, in October 2020 and rebranded itself as Optimizely at the beginning of 2021. This has extended its A/B testing capabilities, and while it is still a challenger it is moving in the right direction.

SDL has also been through an acquisition having been bought by and rebranded as RWS. RWS provided translation and localization, IP support solutions, and life sciences language services. The acquisition has benefited customers of both companies, but from a DXM perspective it has expanded the translation capabilities that SDL already had.

Vendors are also investing in AI and ML capabilities to improve personalization and the customer experience, and Omdia expects to see this trend continue over the next few years. Some vendors will make acquisitions to boost their capabilities and some will develop new capabilities in-house. There is also a growing trend for vendors to use the AI capabilities of major cloud hosting vendors such as AWS, GCP, and Azure, and we expect this to continue. AI and ML are important areas to consider when selecting a DXM platform. Vendors are embedding the technology throughout their

portfolios to improve the effectiveness of customer engagements and make it easier for administrators and marketers to create, import, and use content and digital assets. Use of AI and ML in DXM platforms and complementary products will increase in the coming years as vendors find new and innovative ways of applying the technology to drive engaging customer experiences. It is the vendors that have been innovative in the way in which they have used AI and ML that have generally scored more highly in this report.

In addition, cloud continues to make inroads as the deployment model of choice for many vendors. This has been helped by vendors making their platforms cloud-native. Many vendors have adopted containerization, allowing their platforms to be run in the cloud or on-premises using the same code base, making it simpler to move on-premises to the cloud.

Figure 2: Vendor rankings in the Digital Experience Management Universe

Vendor	Product(s) evaluated
Leaders	
Acquia	Acquia Drupal Cloud, Acquia CMS, Acquia Cloud Platform, Acquia Site Studio, Acquia Site Factory, Acquia Edge, Acquia Code Studio, Acquia Content Hub, Acquia Migrate Accelerate, Acquia Marketing Cloud, Acquia CDP, Acquia Campaign Studio, Acquia Campaign Factory, Acquia Personalization, Acquia DAM, and Acquia PIM
Adobe	Adobe Experience Manager
OpenText	OpenText Experience Platform v21.4, TeamSite v21.4, Media Management v21.4, Experience CDP v21.4, Hightail v21.4, Optimost v21.4, Core Experience Insights v21.4, Magellan v21.4, Exstream v21.4, OT Notifications v21.4, Explore v21.4, LiquidOffice 21.4, and AppWorks v21.4
Oracle	Oracle Content Manager (22.3.1)
Squiz	Squiz Experience Cloud (SaaS), Squiz Connect (SaaS), Squiz Datastore (SaaS), Squiz Funnelback (v16.6), and Squiz Matrix (v6.17)
Challengers	
Optimizely	Optimizely DXP
Progress	Sitefinity DX, Sitefinity Cloud, NativeChat, Ucommerce for Sitefinity, and Corticon
RWS	Tridion
Salesforce	Salesforce Experience Cloud
Prospect	
Ibexa	Ibexa DXP v3, Ibexa Personalization, and Ibexa Cloud

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Source: Omdia

Market leaders

Acquia is a leader in this report having been a challenger in the last Omdia Universe. This is largely due to the acquisition of DAM vendor Widen, which added PIM to the portfolio as well as DAM. Acquia is well suited to enterprises that have large volumes of digital assets to manage. Strong areas for Acquia are DAM, analytics, and AI (through its CDP).

Adobe is a leader because it provides extensive DXM capabilities into which it has embedded Sensei, its AI solution. It also has marketing automation and e-commerce capabilities having acquired two of the leading vendors in these areas. Meanwhile, its Creative Cloud portfolio, which includes Photoshop and InDesign, makes this an ideal option for enterprises that have multiple brands to manage large creative teams. Adobe is particularly strong in DAM, analytics, and AI.

OpenText is a leader because of its comprehensive DXM capabilities and its flexible deployment options. It has a large portfolio of products many of which can be deployed as add-ons to expand its DXM capabilities. OpenText is well suited to enterprises that have complex DXM requirements and require extended capabilities such as customer communication management, extensive collaboration features, and advanced DAM functionality. Strong areas for OpenText are DAM, analytics, and online forms.

Oracle is a leader due to its large portfolio of DXM-related products and the integration it provides with its marketing automation and e-commerce applications. It has also developed its own cloud platform and has a large number of data centers globally to ensure data sovereignty. Oracle is an ideal solution for enterprises that have already deployed other Oracle products, and it would make a good starting point for enterprises wishing to become Oracle-centric. Strong areas for Oracle are DAM, cloud capabilities, and AI.

Squiz is a leader because it offers a wide range of functionality in the DXM area. It also has its own search engine, Funnelback, which it has embedded into its DXM platform to provide additional capabilities such as content analytics. Squiz is well suited to organizations that favor a flexible, fully integrated solution, particularly in the public or government sectors. Areas of strength for Squiz include analytics, developer capabilities, and portals and social features.

Market challengers

Optimizely is a challenger because it lacks a few capabilities that the leaders have particularly in the area of DAM, although it has recently made an acquisition in this area, which should strengthen its capabilities. However, it is positioned closer to the leaders here than in the last related Omdia Universe due to the wide range of capabilities it has. If it addresses weaker areas, then Omdia would expect to see it as a leader in the future. Optimizely is suited to enterprises that want a unified platform that includes content management, commerce management, campaign management, customer data management, analytics, journey orchestration, personalization, experimentation, and optimization. Optimizely is strong in the areas of developer capabilities, analytics, and AI.

Progress is a challenger because it has a wide range of capabilities across the DXM technology area but is missing a few features compared with the leaders. However, it has strengthened its capabilities since the last report and is now close to becoming a leader. Progress is well suited to enterprises that are looking for a DXM platform and want to create their own applications on top. Areas of strength for Progress are analytics, developer capabilities, and portals and social features.

RWS is a challenger because while it has extensive capabilities it is missing a few features of the leaders. However, it is moving in the right direction and is closer to the leaders than in the previous Omdia Universe. RWS is an ideal solution for enterprises that produce content in multiple languages

and want a one-stop-shop approach to DXM and translation facilities. Areas of strength are developer, DAM, and core WCM capabilities.

Being a challenger as a new entrant to the DXM space is an achievement for Salesforce. It takes time to build a platform with the same level of capabilities as more established vendors. Salesforce has the advantage of already having complementary products in the areas of CRM, marketing automation, and e-commerce as well as many existing capabilities that it has been able to incorporate into its DXM platform; it is also being entirely cloud based. This makes it an ideal solution for existing Salesforce customers. Areas of strength for Salesforce are analytics, developer capabilities, and portals and social features.

Market prospect

Ibexa is a market prospect because it targets B2B companies, and they have different requirements to the B2C companies targeted by the other vendors in this report. This does not mean that B2C enterprises should not consider Ibexa, because it does have many of the features required and it allows enterprises to adopt a best-of-breed strategy for DXM. Ibexa is therefore ideally suited to those B2B organizations that need a DXM platform optimized for their requirements. Ibexa's strongest areas are cloud capabilities, developer capabilities, and portals and social features.

Opportunities

Digital transformation is an enormous opportunity for DXM vendors as the majority of enterprises' strategies are still in progress. Cloud is an important element of digital transformation, and as most DXM vendors have now developed cloud-native platforms and many offer their own SaaS or PaaS solutions, this provides sales opportunities for enterprises looking for more efficient and cost-effective ways of running platforms and applications.

COVID-19 has also provided opportunities for vendors as it has accelerated the work-from-home paradigm, which has resulted in enterprises having to adapt the way in which they work to support remote users. This has meant vendors having to adapt their platforms to support these new working practices. Those vendors that have extensive collaboration features that support remote teams will have an advantage when enterprises are looking to procure new DXM platforms. It has also resulted in a large increase in the number of online sales, which has meant companies having to change the ways in which they engage with customers and ensure that every touchpoint is optimized. Here, the ability to personalize content at scale is key to successful online sales.

Threats

The major threat for DXM vendors comes in the form of competition from other vendors playing in this very lucrative space. There are different types of vendors that have DXM platforms. The first is the specialist DXM vendor that has a single DXM platform. It might have related products that are available as standalones, but its revenue is predominantly derived from its DXM platform. These include Acquia, Ibexa, Optimizely, and Squiz. The second type are multiple product vendors that play in a number of different areas. Some such as OpenText and Oracle also have content services platforms, while others such as Adobe, Progress, and RWS have other product lines that have capabilities that can be complementary to DXM. Salesforce is another type of vendor as it is a new entrant to the DXM space.

Another threat comes from enterprises with legacy/old WCM platforms or in-house built systems. Very often it is difficult for enterprises in this position to upgrade to a modern DXM system because of the amount of dependent code they have, which would be a mammoth task to rewrite. Vendors need ways to help enterprises determine the amount of dependent code they have and to provide

tools to help ease the migration task. This could prove to be a major competitive advantage when these companies decide to update their systems.

Market outlook

Despite being a very mature technology area with few greenfield sites, the content management space that includes DXM is still growing at a forecast AGR of 12.21% between 2020 and 2025 according to Omdia's *Software Market Forecasts: Analytics and Data Management, 2020–25*. The value of the market is expected to increase from \$26,843m in 2022 to \$37,667m in 2025. This means there are plenty of opportunities for DXM vendors. At the same time, AI and ML are regarded as very important or important to almost 64% of enterprises according to data in the Omdia Enterprise Insights collection, which demonstrates that companies are keen to use the technology and reinforces the need for DXM vendors to increase their AI/ML capabilities. In addition, 31% of companies have strategic investment plans for AI-driven workflow, augmentation, and automation, while a further 36.5% plan a minor investment. This indicates that a large proportion of the forecast increase in content management spend will be made in AI-related areas.

Cloud adoption in the content management space has traditionally been slow, although adoption for DXM is higher than for enterprise content management (ECM) or content services platforms. Omdia data shows that 13.5% of enterprises already have, or plan to deliver, applications now or within 18 months on a public cloud through PaaS. A further 18% plan to deploy on IaaS, although nearly 24% have already done so or are planning to deploy in a private cloud, and there are still 15.5% using legacy on-premises systems. Although there are signs that cloud adoption is growing, particularly in public cloud, there is still a significant number either using on-premises systems or private clouds, and these should consider whether public cloud options would be beneficial, particularly if they are using their own data centers.

Squiz (Omdia recommendation: Leader)

Squiz should appear on your shortlist if you are looking for an established, open source DXM vendor, particularly if you are a public sector, or government organization.

Overview

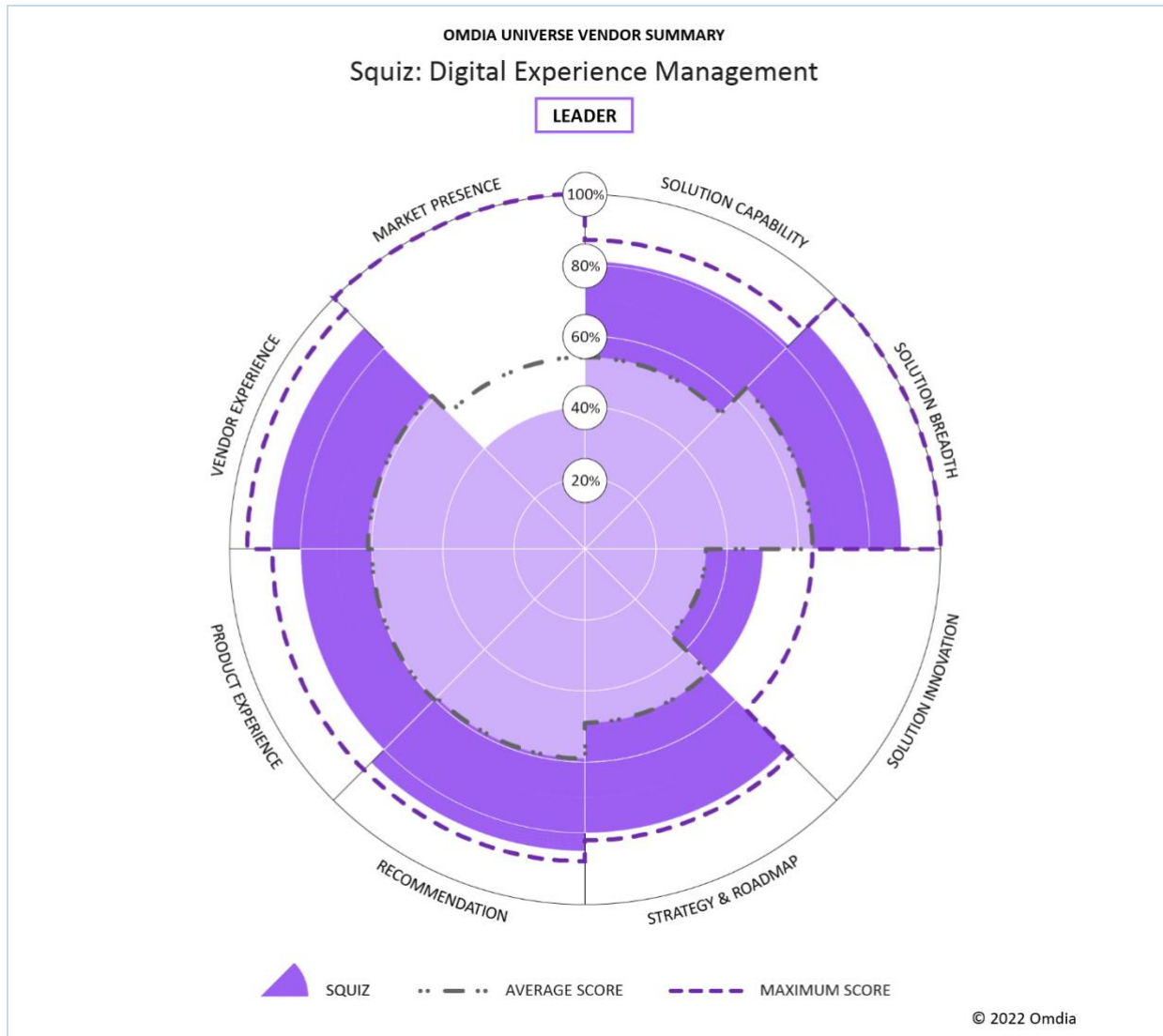
In terms of revenue, Squiz is one of the smaller vendors in this Omdia Universe report. It is headquartered in Australia but is creating a global presence. Active in the UK for many years and with a well-established customer base, Squiz has now expanded into the US and already has a number of customers there, which should enable it to grow at a quicker pace. Squiz is open source with both DXM, which includes Matrix, its WCM system, and Funnelback, its search capability. Although it is a horizontal product, it does target government and public-sector organizations, and has built applications focused on these verticals. Squiz has introduced a new cloud option with its enterprise SaaS model, built on the public cloud, which provides a more cost-effective and easier deployment option, which will particularly benefit organizations that do not have the resources internally to manage the complexities of the IT infrastructure. In addition to the strengths listed below, another area of strength for Squiz is content management and publishing.

Strengths

Some of Squiz's strongest areas are analytics, developer capabilities, and portals and social features. Its analytics capabilities include the ability to store metrics for progressive user profiling. Metrics that can be tracked include page visit history, entry page, search term usage, online purchase history, and personal user profile settings. Custom metrics can also be specified. A recent addition is Squiz Datastore, which enables the platform to unify organizational data and combine it with tracked user attributes and behavioral activity for reuse across multiple sites and channels. In addition, Squiz supports integration with customer engagement, analytics, and journey-mapping tools. These capabilities allow Squiz to track users from anonymous to known users using the same tools for data collection, segmentation, content targeting, and personalization. Content stored in external data sources can be analyzed as well as that stored in the Squiz DXP. Integration with third-party analytics tools such as Google Analytics, provides organizations with the flexibility to choose the most appropriate tools for their use case and budget. The inclusion of SEO Auditor means that the search ranking of content can be optimized through an autogenerated step-by-step guide to enhance the page's ranking. Built-in tools provide A/B or multivariate testing with configuration via the Variations and Personas feature, which creates multiple versions of the same page. Split and multivariate testing is also supported through integration with third-party solutions including Google Optimize and Optimizely. Metrics can be stored against a persona to create segmentations using a range of dynamic session metrics, such as page visit history, entry page, search term usage, online purchase history, and personal user profile settings.

Squiz Matrix includes a number of developer-focused tools including Git integration to enable local development, code branching, and publishing. Performance mode and performance logging are both

Figure 12: Omdia Universe ratings – Squiz



Source: Omdia

supported, and there is a built-in debug mode to bypass Server Side JavaScript execution. Server logging UI and switchable UI for monitoring PHP warnings and errors in page, enhance the capabilities as do a cache bypass and refresh handles that can be accepted on any page. In addition, create, read, update, and delete CRUD APIs are available to programmatically read and write data from external applications or scripts. Squiz provides best practice and coding standards using boilerplate code to help build websites quickly. The Squiz boilerplate provides a modular, scalable starting point for creating design elements and frontend JavaScript applications. A number of sample website templates, prepackaged search stencils, data blueprints, and integration recipes are available on the Squiz marketplace. Users can create or reuse composable fragments of content using component templates in the DXP, which provide a flexible means to express a content model, configuration model, editing experiences, and rendering outputs. Squiz has a number of prebuilt applications including Squiz Workplace, a prebuilt horizontal digital workplace application; Citizen Experience: Citizen Portal, a prebuilt application that provides a rapid to implement solution for

local government agencies, and its student experience solution, Edify , which is a prebuilt experience application that is targeted at student success.

The portals and social features capabilities include support for a number of social content types, including news articles, blogs, team pages, wiki pages, resource libraries, polls, FAQs, and events, which are supported by social and collaboration tools including social commenting and activity streams. Passthrough authentication is available through security assertion markup language (SAML), open authorization (oAuth), and LDAP facilities. Squiz has demonstrated the suitability of its tools for creating portals by building and making available portal applications comprising Squiz Workplace, Citizen Portal, and Squiz Edify. Nontechnical users are able to create page content and develop websites with little or no coding. Content editors have the choice of the advanced administration interface or an easy-to-use editor interface that provides a no-code page builder capability and on-page editing of web content. Targeted news, content, and alerts can be delivered using personalization features that can be at the granular level using the persona feature or at the general level using the @ handle to target groups. The Squiz Workplace is a digital workplace application that can be used as a social community portal with wikis, knowledge articles, and news. Social commenting and community features are also available, and users can use @mentions, #tags, likes, comments, ask questions, and replies to collaborate around knowledge articles. Interest groups can be formed using the social communities feature. In addition, communities can be created around functional teams, cross-functional project teams, and like-minded individuals across the organization, and built-in support allows integrations with external knowledge-base systems, document collaboration platforms, instant messaging systems, and other collaboration platforms.

Limitations

The use of AI in Squiz DXP is not spread as widely through the platform as some of its competitors. For example, Squiz is not using AI in its DAM capabilities, which means it is unable to deliver some capabilities such as auto tagging for assets. It is also not using AI in its online forms features, although it is possible to integrate with AI platforms such as AWS or Google.

Squiz does not include IRM capabilities, which means that organizations that require IRM will need to use a third-party solution. Squiz also does not specifically store content on mobile devices. All data and content for mobile is stored in the DXP and accessed via an API over a secure, authorized connection, which could be an issue if employees want to work on or approve content when they are offline.

Appendix

Omdia Universe

The process for writing a Universe is long and time consuming; it involves the following:

- Omdia analysts perform an in-depth review of the market using Omdia’s market forecasting data and Omdia’s enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

The criteria for inclusion of a vendor solution in the *Omdia Universe: Selecting a Digital Experience Management Solution 2021–22* are as follows:

- The solution can be used as a headless solution.
- The solution provides integration capabilities to a wide range of applications.
- The vendor has adopted a cloud-first architecture that allows the solution to be easily migrated to the cloud.
- The solution has a significant level of recognition among enterprises, covers a range of verticals, and has a presence in multiple geographies.

Further reading

[2022 IT Enterprise Insights: Key Findings and Content Guide](#) (October 2022)

[Analytics & Data Management Forecast Report – 2021 Database](#) (October 2021)

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