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Magic Quadrant pour les plateformes d'expérience numérique

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Les plateformes d'expérience numérique permettent de gérer la manière dont les clients et les partenaires commerciaux interagissent avec le marketing numérique et les expériences authentifiées. Cette étude aidera les responsables de l'expérience client à identifier les fournisseurs qui répondent à leurs besoins organisationnels sur le web, le mobile et les autres canaux numériques.

Hypothèses de planification stratégique

- D'ici 2026, au moins 70 % des organisations seront obligées d'acquérir une technologie DXP composable, par opposition aux suites DXP monolithiques, contre 50 % en 2023.

- D'ici 2027, 40 % des organisations ne parviendront pas à offrir une expérience client numérique percutante en raison d'un manque de coordination de contenu intelligent et de stratégie d'exploitation de contenu basée sur l'IA.

Définition/Description du marché

Une plateforme d'expérience numérique (DXP) est un ensemble cohérent de technologies intégrées conçues pour la composition, la gestion, la diffusion et l'optimisation d'expériences numériques personnalisées sur plusieurs canaux du parcours client.

Une DXP orchestre plusieurs applications pour permettre la création, la gestion et la présentation d'expériences numériques fluides . Elle s'intègre à un écosystème d'entreprise

numérique grâce à des intégrations API avec des technologies adjacentes. Les DXP sont adaptées aux cas d'usage B2C et B2B .

Caractéristiques obligatoires

- Prise en charge de la présentation multi-expériences , de l'orchestration, de la livraison et de l'assemblage d'expériences numériques via des capacités hybrides et/ou sans tête.

- Une architecture composable pour des approches modulaires et API-first, avec un ensemble (ou des ensembles) de capacités métier packagées (PBC) discrètes, orientées tâches et déployables indépendamment .

- Fonctionnalités cloud disponibles pour le déploiement cloud en tant que services gérés SaaS ou Platform as a Service (PaaS) pour la polyvalence du déploiement, l'évolutivité et l'élasticité, la rentabilité, l'amélioration des délais de mise sur le marché et l'innovation rapide associée au cloud computing.

- Intégration et orchestration permettant l'intégration de diverses applications, services et sources de données, avec la possibilité de prendre en charge et de gérer des processus en plusieurs étapes. Cette intégration permet également d'intégrer ces applications, services et sources de données à l'expérience numérique et à l'expérience utilisateur.

- Capacités de gestion de contenu pour gérer divers types de contenu, notamment le contenu textuel, les graphiques et autres médias riches, le contenu Web, le contenu d'applications mobiles, le contenu de chatbot et le contenu vocal.

- Services de compte pour la gestion du profil client, l'enregistrement, la connexion et les capacités de gestion des mots de passe dans une expérience authentifiée et connectée .

Caractéristiques communes

- Personnalisation et prise en compte du contexte pour des expériences pertinentes et individualisées pour le client en fonction du comportement passé, de la segmentation, des technologies d'IA et des sources de données externes.

- Analyse et optimisation pour évaluer et améliorer en continu les performances, l'efficacité et l'utilité des expériences numériques.

- Support programmatique à l'échelle de la plateforme pour la cartographie du parcours client, l'orchestration du parcours client et l'analyse du parcours client tout au long du cycle de vie du client.

- Gestion des données clients pour comprendre les clients, gérer des silos de données clients disparates dans une vue à 360 degrés et créer des segments de clientèle basés sur des attributs provenant de plusieurs sources de données.

- Recherche, navigation et analyse pour localiser et découvrir des informations, des applications et des services.

- Collaboration et partage des connaissances permettant aux utilisateurs de travailler ensemble en groupes ou en communautés pour atteindre des objectifs commerciaux communs par le biais de conversations ou d'échanges d'informations.

- Sécurité et contrôle d'accès pour les rôles et les autorisations, et exigences de sécurité et de conformité réglementaire de plus en plus exigeantes.

- Intelligence artificielle appliquée à l'utilisation de l'apprentissage automatique, du traitement du langage naturel, de la génération de langage naturel, de l'IA générative et d'autres technologies d'IA pour améliorer l'engagement.

Quadrant magique

Figure 1 : Magic Quadrant pour les plateformes d'expérience numérique

CHALLENGERS — LEADERS — NICHE PLAYERS — VISIONARIES

Optimizely
Adobe
Acquia
HCLSoftware — OpenText
Liferay
Contentstack — Sitecore
Progress
Kentico — Magnolia
CoreMedia
Builder.io — Contentful
Uniform
Squiz
Pimcore

ABILITY TO EXECUTE

COMPLETENESS OF VISION → As of November 2024 © Gartner, Inc

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Points forts et précautions du fournisseur

Acquia

Acquia est leader dans ce Magic Quadrant. Sa plateforme d'expérience numérique Acquia comprend Cloud Platform, un système de gestion de contenu (CMS) basé sur Drupal, Optimize pour l'accessibilité et l'optimisation, une plateforme de données clients (CDP), Campaign Studio pour les campagnes marketing multicanal et Convert pour la personnalisation et les tests. Elle est disponible en PaaS géré, avec certains composants disponibles en SaaS. Son siège social est situé à Boston, dans le Massachusetts, et elle est présente en Europe et en Asie-Pacifique. Ses clients sont principalement de grandes

entreprises des secteurs de la communication, des médias, de l'éducation, de l'industrie manufacturière, des services environnementaux, des administrations publiques et de la santé.

Points forts

- **Environnement de développement centralisé :** Acquia prend en charge le développement et la gouvernance d'un portefeuille de sites web et d'applications numériques sur une plateforme unique et unifiée. Cela permet une réutilisation accrue du code et des composants, optimisant ainsi les bénéfices du développement.

- **Intégration de l'IA :** Acquia propose un support IA pour la stratégie de contenu, notamment la rédaction d'évaluations pour l'optimisation des moteurs de recherche (SEO). Les développeurs bénéficient d'un chatbot IA faisant office d'assistant virtuel pour les tâches de configuration courantes, de studios et de modèles d'apprentissage automatique, ainsi que de la création de code enrichi par l'IA via un assistant de développement Drupal.

- **Open-source community:** Acquia's continued support of its large and innovative open-source Drupal community offers 50,000 plug-ins and 1,000 distributions. This allows for additional product innovation, connectors and recipes, and acts as a bridge between open-source and commercialized versions of the Drupal CMS.

Cautions

- **Lack of SaaS:** Acquia estimates that its SaaS deployment option will be generally available in July 2025. It is slow to respond to the demand of a SaaS deployment option for its DXPs. Clients evaluating Acquia should ensure that they understand the timeline of deliverables in the SaaS offering.

- **Pricing:** Some customers cite Acquia's prices as unpredictable with a high initial price point and additional costs required for the products and services not included under the subscription. Prospects should ensure that their proposals include clear pricing for all products and services needed to meet their organization's objectives.

- **Declining momentum:** Acquia's presence on prospects' shortlists has been declining. Based on Gartner client interactions, this raises concerns for viability and health of the ecosystem. Prospects should ensure that customer references are recent and, if relevant, implementation partners are aligned to their industry and technical requirements.

Adobe

Adobe is a Leader in this Magic Quadrant. Its DXP is part of the Adobe Experience Cloud, which includes Adobe Experience Manager (AEM) for content management, Adobe Target for personalization, Adobe Customer Journey Analytics and Adobe Real-Time Customer Data Platform (CDP) for customer data management, among others. It is available both as a managed PaaS and SaaS. Adobe is headquartered in San Jose, California, and has a presence in all regions. Adobe is often adopted by large enterprises in retail, financial services, media, healthcare, government and hospitality.

Strengths

- **Brand awareness:** Adobe's DXP offering is well-regarded in the market with high brand awareness. It is often adopted by buyers with sophisticated digital marketing strategies that are looking to adopt high-end personalization, analytics, content and customer data management.

- **Innovation:** Adobe is known for technological innovation and a unique blend of end-to-end functionality that provides broad support — from creative ideation to delivery and optimization — across a variety of different digital channels.

- **Partner support:** Adobe has one of the most developed partner channels that includes design and creative agencies, systems integrators, and marketing and advertising agencies. This provides customers with many options to deploy and support the vendor's products.

Cautions

- **Price:** Adobe continues to be one of the most expensive DXP offerings in the market. The recently launched unified pricing metric is geared at simplified and centrally managed consumption, but is only available to selected customers in certain scenarios. As a prospect, you need to investigate if the Unified Pricing Metric is available and appropriate for your organization.

- **Complex product portfolio:** Adobe struggles with an increasingly complex product portfolio, resulting in a suboptimal user experience for nontechnical users. Prospects should plan for significant change management, and user training and enablement.

- **Technical skills required:** The learning curve for Adobe's technical skill set is steep and is unique to each product under the DXP umbrella. Prospects should know that success

depends on finding the right partner, and dependence on such partners/systems integrators can add complexity and cost for both initial implementation, and enhancements and integrations.

Builder.io

Builder.io is a Niche Player in this Magic Quadrant. Its Visual Development Platform DXP consists of a headless CMS, Visual Editor for nontechnical users, and optimization, which also offer analytics such as heat maps. It is differentiated by its design-to-code functionality. It is available as a fully SaaS solution. Builder.io is headquartered in San Francisco, California, with a presence in the Asia/Pacific region. A considerable majority of its clients are midsize retail organizations.

Strengths

- **Easy design functionality:** Builder.io's design-to-code functionality reduces a major bottleneck in many projects by allowing Figma designs to be imported without the need for a specialist developer. This reduces training needs for in-house teams and the need for expensive DXP implementation partners.

- **Flexible layout:** Builder.io's layout control caters for nontechnical users. It offers guardrails and flexibility over traditional templated approaches by allowing rapid adoption of modern, performant digital experiences.

- **Price structure:** Builder.io is cost-effective, with pricing that can scale with increased adoption. This means that projects can be implemented as a proof of concept with predictable costs as adoption widens within the organization.

Cautions

- **Uncertain future:** Builder.io is a startup vendor with a future that is uncertain as some larger vendors add what is currently differentiated functionality for Builder.io to their DXPs. Prospects should closely examine the partner network and consider whether Builder.io has sufficient resources to support their requirements.

- **Retail focus:** Builder.io has a strong retail focus in its existing customer base. Prospects with content-heavy digital experiences, where the volume of content takes priority over the design of the experience, should closely examine its CMS functionality.

- **Non-native functions:** Builder.io clients must supplement and integrate with other providers for features such as customer journey analytics and customer data. Prospects should be aware of where they need to procure and integrate third-party solutions in order to meet their requirements.

Contentful

Contentful is a Niche Player in this Magic Quadrant. Its product portfolio consists of Contentful Platform for content management, Contentful Studio for visual building, Contentful Ecosystem for integrations, and Ninetailed by Contentful for personalization. It is available as a fully SaaS solution. The company is headquartered in Berlin, Germany, with a presence mainly in North America and Europe. It serves clients who are mostly midsize to large enterprises in communications, media, retail, manufacturing, banking and hospitality.

Strengths

- **Composable, headless architecture:** Contentful is available as a pure-play cloud-native, multinentant SaaS solution in a headless architecture. Prospects looking for modernization of their cloud infrastructure and leaning toward a composable, headless architecture find this appealing.

- **Brand awareness:** Contentful has notable brand awareness and has been building out its portfolio from CMS-only toward a composable DXP. It is often included on shortlists by buyers interested in a composable approach.

- **Partner network:** Contentful has a broad network of partners and systems integrators in Europe and North America, which gives new and existing customers plenty of options for both partners and surrounding technologies.

Cautions

- **Organizational changes:** Contentful has experienced a number of growing pains, from a complete overhaul of its C-suite to declining product innovation. This has resulted in stability concerns. Prospects should examine its roadmap and deliverables to help evaluate Contentful's ongoing vision.

- **Personalization:** Contentful's native personalization features are comparatively nascent, as they're based on a recent August 2024 acquisition of Ninetailed. Prospects should be aware of potential challenges with user experience and the lack of some expected

functionality like predictive analytics. Prospects must have a clear understanding of their own requirements when assessing this newly acquired functionality.

- **Developer focus:** Contentful has historically been known for targeting the IT audience in its go-to-market and product strategy, rather than marketing and nontechnical business users. This leads to it not being considered by prospects with requirements around usability and ease of use for nontechnical users.

Contentstack

Contentstack is a Visionary in this Magic Quadrant. Its DXP product — Composable DXP — includes the following products: Headless CMS for content management, Launch for deployment and front-end hosting, and Personalize for personalization and other features. It is available as a fully SaaS solution. The company is headquartered in Austin, Texas, with a presence mainly in North America, Asia/Pacific and Europe. Its clients are mostly midsize to large enterprises and primarily in retail, manufacturing, communications, media and transportation.

Strengths

- **Front-end hosting:** Unlike similar headless and composable vendors in this market, Contentstack is differentiated through its native offering for front-end hosting. Buyers seeking an integrated and bundled approach for both back-end and front-end hosting find this appealing.

- **Personalization:** Contentstack chose to develop its own built-in personalization functions organically as opposed to acquiring a separate vendor. Its personalization features and product roadmap allow for an incremental approach for customers.

- **Customer service:** Contentstack is well-regarded for customer service and support, documentation and user education. Its customers like the unique approach of the Care Without Compromise service product, which yields high customer satisfaction and retention rates.

Cautions

- **Complexity:** Contentstack presents a comparatively steep learning curve for nontechnical users. Its product has grown organically in complexity. It can also be difficult to navigate due to its vast number of integrations. Prospects should assess usability by specifying essential use cases in the demonstration phase.

- **Pricing:** Contentstack's pricing is most suitable for large enterprises. Small and midsize businesses find the price tag high for their needs. Prospects should compare pricing for their use case and future growth with other similar vendors.

- **Partner channel:** Contentstack's partner channel is comparatively small and is primarily concentrated in North America and Europe. Buyers in South/Latin America or Middle East and Africa may experience difficulties finding an appropriate systems integrator.

CoreMedia

CoreMedia is a Niche Player in this Magic Quadrant. Its composable DXP — CoreMedia Experience Platform — includes content management, integration and interoperability, analytics, insights, personalization, experimentation, marketing automation, and customer data management. It is available as a vendor-managed PaaS, self-managed on-premises, or in a public cloud. Its headquarters are in Hamburg, Germany, and it has a presence in EMEA, North America and Asia/Pacific. CoreMedia primarily serves the retail and communications industries.

Strengths

- **Artificial intelligence:** CoreMedia's AI (KIO) and "blueprints" extend the utility of the platform, perform multistep processes, and provide in-app guidance showing a broad range of uses for AI.

- **Customer journey management:** CoreMedia's customer journey management features are differentiating. It has increased the touchpoints that can be managed, including its contact center, to provide a broad picture of customer interactions.

- **Pricing:** CoreMedia has updated its pricing to better align to the digital needs and maturity of its clients. Both composable and packaged pricing is available across its portfolio, meaning there is no need to overcommit, and that value can be aligned to each prospect's business cases.

Cautions

- **UI needs simplification:** CoreMedia Experience Platform's back-office UI is in need of an update. It provides powerful utility, but its usability falls behind other vendors in this evaluation. Prospects should assess usability for their use cases in customized demonstrations.

- **Limitations outside of Europe:** CoreMedia has limited awareness and vendor resources outside of Europe. Prospective buyers in other regions should assess whether this solution can serve their needs.

- **Platform suitability:** Some organizations that are less digitally mature, or that have less-sophisticated digital experience management requirements, are less likely to benefit from the full CoreMedia platform.

HCLSoftware

HCLSoftware is a Challenger in this Magic Quadrant. Its DXP, HCL Digital Experience, is part of the wider HCL Customer Experience and Total Experience portfolio. Core functions include content management, DAM, CDP, no-code application, form development and HCL Discover. It is available on-premises, although some newer deployments are moving to a PaaS offering. It is headquartered in Santa Clara, California, and has global operations. Its customers are primarily large and global enterprises, mostly in government, banking, healthcare and insurance verticals.

Strengths

- **Governance and compliance:** HCLSoftware focuses on security and governance, making it suitable for large organizations with strict data protection, compliance and security needs.

- **Global presence:** With a strong worldwide presence, HCLSoftware serves organizations in underserved regions. It provides strong regional support from its global network of technology partners for its geographically diverse customer base.

- **Analytics and intelligence:** HCLSoftware launched HCL Discover in 2024, featuring real-time activity monitoring, funnel analysis, root cause analysis, impact analysis, and behavioral insights. HCL Discover enhances its DXP's analytics, intelligence and dashboard features.

Cautions

- **Implementation cycle:** Some HCLSoftware customers note longer-than-expected implementation cycles, along with delayed query resolution for both developers and business users. Prospects should ensure that any proposed implementation plans are coordinated and kept on track.

- **Outdated UI:** HCLSoftware's DXP has an outdated user interface with limited usability. Some customers also report inconsistent timelines for future releases that address these shortcomings. Prospects should be wary of any key requirements that are supposed to be met by future releases.

- **Technical bloat:** Getting to a full DXP remains a complicated proposition for some HCLSoftware customers, as some required functions are available in adjacent products (such as HCL Unica and HCL Connections). This approach can create technical bloat when organizations need certain functions without paying for the full feature sets of those products.

Kentico

Kentico is a Niche Player in this Magic Quadrant. Its "all in one" DXP, Xperience by Kentico, targets digital marketers with a broad range of features, including content management, marketing automation and digital commerce. It is available as single-tenant SaaS. Kentico is headquartered in Brno, Czech Republic, with a strong presence in EMEA and North America. Its DXP is mostly used by midsize organizations in financial services, healthcare and manufacturing.

Strengths

- **Platform vision:** Kentico has a broad range of DXP capabilities in a packaged "one-stop shop" that is easy to use. It includes forms-based workflow and consent management as well as basic CRM functionality, making it a good choice for small to midsize organizations that lack these functions.

- **Strong growth:** Kentico is growing its annual recurring revenue well above the market average, and investing in its new cloud offering, which now acts as its single go-to-market product.

- **Personalized experience management:** Kentico's new visual page builder has built-in visual rule-based personalization features and integrations to third-party optimization tools, making content personalization easy to implement for nontechnical business users.

Cautions

- **Innovation:** Kentico has focused on replatforming and migrating customers to its new product and reaching feature parity with its previous platform. As a result, in 2023 it had a

reduced focus on innovation compared with other vendors. Prospects should examine whether the current roadmap for deliverables aligns to their core business cases.

- **Market presence:** Kentico has a good customer presence across a broad range of industries in EMEA and North America, but remains a small vendor compared with others in this research, and lacks market awareness elsewhere. Prospects might struggle to find regional implementation partners outside of EMEA and North America.

- **Search:** Kentico's DXP lacks a productized site search engine. While a basic index can be implemented for customers, this requires configuration by the client. Prospects need to factor search requirements into their costs.

Liferay

Liferay is a Niche Player in this Magic Quadrant. Its DXP — Liferay Digital Experience Platform — includes experience management, content management, personalization, AI and analytics, and low-code development. It offers SaaS, PaaS and on-premises/customer cloud deployments. Based in Diamond Bar, California, the company has a presence in Latin America, EMEA and Asia/Pacific. Its customers are mostly midsize to large enterprises in banking, government, retail, education, communications, media and services.

Strengths

- **AI integration:** Liferay's DXP wraps prebuilt integrations with various GenAI and applied AI applications into useful wizards for content and layout. An extensive set of headless APIs and batch processing facilitates ease of connectivity and utility of AI platforms.

- **Low code:** Liferay's low-code development for nontechnical business users includes a new low-code API builder for intuitive control and configuration of API responses. This reduces the development resources needed for integration and configuration.

- **Composability:** Liferay has embraced composable architecture by offering native PBCs and Liferay extensions that move native functionality into its extensions architecture. This balances SaaS service convenience with customizations or integrations outside of the core services.

Cautions

- **Cloud strategy:** While SaaS has become an available option, a high percentage of Liferay customers still run Liferay DXP primarily on-premises. Customers will slowly transition,

which could impact both adoption rates and Liferay's investment in and innovation of its SaaS version.

- **Go-to-market:** Liferay has historically focused on IT buyers, and not the customer base of nontechnical users. This may result in features and functionality that prioritize IT functions and efficiencies over business functions. This may not suit prospects who require improvement in those areas.

- **Documentation:** Gartner Peer Insights reviewers report that Liferay documentation is hard to understand and often lacks the best practices required by developers. Prospects who are looking to customize this solution should carefully examine the documentation and training available.

Magnolia

Magnolia is a Visionary in this Magic Quadrant. Magnolia DXP includes content management, personalization and search. It is available on-premises or as a PaaS offering in various public or private clouds. The company is headquartered in Basel, Switzerland, and has a presence in North America and Asia/Pacific. Its clients tend to be midsize and large organizations within a broad range of verticals, with a focus on financial services, insurance, hospitality and manufacturing.

Strengths

- **AI innovation:** The latest releases of Magnolia DXP include differentiated AI functionality, such as AI assistants and AI accelerators. Customers looking for a more conservative iterative approach with AI may benefit from this functionality.

- **Composability:** The vendor embraces lean architecture and composability by offering native PBCs and providing integration frameworks for third-party tools and custom PBCs in Magnolia's marketplace.

- **Pricing structure:** Magnolia's pricing and packaging is clear and easy to understand, and is also easily able to start small and grow as and when needed. Its pricing model provides a lower barrier to entry for its customers and prospects.

Cautions

- **Limited brand awareness:** Magnolia's presence and brand awareness, as well as availability of partners and systems integrators, remain low outside of its core base in

Europe. This makes it more challenging for prospects in other geographies to consider Magnolia on their product selection shortlists.

- **Lack of SaaS:** Magnolia is yet to provide a SaaS option with feature parity to its self-hosted and PaaS DXP. Prospects with SaaS requirements should pay attention to the roadmap for feature rollouts in this area.

- **Technical skills required:** Because Magnolia DXP carries a steeper learning curve, it is less suited to smaller organizations with low technical skills, or those without the technical resources to make the most out of the platform and its integration.

OpenText

OpenText is a Challenger in this Magic Quadrant. Its OpenText Experience Cloud DXP includes content management, web and mobile experiences, DAM, analytics, personalization and optimization. It is available on-premises or hosted on a public cloud through Amazon Web Services, Google Cloud Platform or Microsoft Azure; on a private cloud through its OpenText Private Cloud services; or as a fully managed service. The company is based in Ontario, Canada, and has a global presence. Its customers are mostly large enterprises, primarily in manufacturing, government, retail, financial services and insurance.

Strengths

- **Authenticated experience:** OpenText's expertise at serving organizations in highly regulated industries makes it suitable for buyers needing governance, security, account management and auditability in authenticated experiences.

- **Product development:** The vendor launched OpenText Core Journey in April 2024, with customer journey mapping, insight generation, and action orchestration features in a SaaS-based application. OpenText Experience Aviator provides GenAI, image AI and content analysis for improved user experience.

- **Beyond DXP:** OpenText extends beyond DXP to support broader IT strategy areas, including content services, customer communications management, analytics and business intelligence. Its 2023 acquisition of Micro Focus added observability and IT operations management. This serves organizations seeking a single-vendor relationship.

Cautions

- **Complex UI:** OpenText's DXP UI is complex, inconsistent and outdated compared with others in this evaluation. When issues are addressed in new releases, some customers cite lengthy upgrade cycles with inconsistent timelines. Prospects must define scenarios for the demonstration stage that allow them to assess suitability for their business needs.

- **Postacquisition focus:** OpenText's DXP caters for postacquisition use cases like customer service and may not be as well-suited for prospects that focus on the preacquisition marketing use cases that drive most DXP investments.

- **Platform complexity:** OpenText's perception as broad and complex results in many buyers not considering the DXP on shortlists unless they have made substantial investments in its other information management products.

Optimizely

Optimizely is a Leader in this Magic Quadrant. Its DXP, Optimizely One, includes content management, personalization, customer data management and analytics functions with embedded AI tools via Optimizely Opal assistive AI. The Optimizely Graph and Optimizely Connect Platform (OCP) modules enable flexible integrations. It is available as SaaS or as a hybrid SaaS/PaaS solution. Optimizely is based in New York, and also has a presence across EMEA and parts of Asia/Pacific. It mostly serves midsize to large enterprises in retail, financial services, communications, media, insurance and hospitality.

Strengths

- **Platform breadth and modularity:** Optimizely has the broadest set of features in this research, with aligned UIs making modules easy to move between and consume. Customers can replace native with third-party capabilities for best-of-breed technologies for those who desire more composability.

- **Pricing and packaging:** Optimizely pricing is simple, scalable, modular and transparent. This lowers the barrier to entry and enables customers to use an iterative approach over time.

- **Global momentum and growth:** Optimizely is growing faster than the industry average in this space, is established in all regions, and is successful in targeting the marketing function.

Cautions

- **Marketing focus:** Optimizely's current focus on the marketing function means that other buyers — such as B2B sales or digital commerce leaders — are less targeted. Its approach to the market and its customer base is weighted toward B2C operations, which may reduce its relevance to other use cases over time.

- **Core SaaS immaturity:** Optimizely's core SaaS CMS/DXC products were less than a year old during this research. The features and functionality of the new deployment type is not broadly adopted and lacks real-world testing. Prospects should ask for proofs of concept and assurances, or demonstrations of performance and other nonfunctional requirements.

- **Customer interactions:** Optimizely's purchase process can be difficult for some customers, while implementation is a challenge for others. Gartner Peer Insights reviewers have given the company lower scores for evaluation, contracting, integration and deployment.

Pimcore

Pimcore is a Niche Player in this Magic Quadrant. Its DXP, Pimcore Enterprise Edition, consists of content management, personalization, a CDP and product information management that specializes in data management. It is available on-premises, as self-hosted, or as a fully managed PaaS. It is headquartered in Salzburg, Austria, with a limited presence outside of EMEA. Its open-source heritage provides an active international community. Pimcore Enterprise Edition is typically aimed at midsize organizations in retail and manufacturing.

Strengths

- **Experience orchestration:** Pimcore exposes data and interfaces from multiple applications and provides a single location in which to manage the delivered experience.

- **Developer flexibility:** Pimcore appeals to builders rather than buyers as a highly extensible, open-source solution, providing a foundation on which developers build a solution suited to the customer's needs.

- **Data management:** Pimcore's ability to manage content, digital assets, product information and master data — along with integrating, augmenting and transforming other sources of data — make it well-suited to retail and manufacturing clients that need to combine multiple sources to power their digital experiences.

Cautions

- **Complex UI:** Pimcore's appeal to developers comes at the expense of out-of-the-box user-friendly features. Its UI is at times complex. Prospective buyers should assess whether they have the necessary developer resources for this product.

- **Lack of brand awareness:** Pimcore, which has historically provided an open-source solution, is now beginning to introduce commercial products and services that are intended to reach a global audience. Prospective buyers should conduct due diligence to resolve any concerns about its future market direction.

- **Limited geographic reach:** Pimcore is relatively small in this market. It has limited geographic reach, and is reliant on its open-source roots. With a limited presence outside of EMEA, prospective buyers should consider whether they can access regional implementation partners.

Progress

Progress is a Niche Player in this Magic Quadrant. Its DXP is called Progress Digital Experience and consists of Sitefinity (content management); Sitefinity Insight (CDP); Telerik and Kendo UI (app UI/user experience development); and NativeChat (conversational interfaces). It is available on-premises as self-hosted, or as a fully managed PaaS, or as SaaS. It is headquartered in Burlington, Massachusetts, and has a global presence. Its customers tend to be midsize organizations primarily in consumer electronics, banking, communications, media, government and manufacturing.

Strengths

- **Technology stack:** Progress offers a solid technology stack for midcomplexity scenarios that combine out-of-the-box features with customization requirements that are well-addressed by deep and broad developer tooling. Midsize organizations find this balance particularly appealing.

- **Customer data management:** Progress has advanced in its expansion of its customer data management feature set, with real-time predictions and conversion probability aimed specifically at business and marketing users.

- **Authenticated experiences:** Progress is a good fit for authenticated portal-like experiences. B2B and B2C organizations with a strong emphasis on logged-in

experiences, or B2C organizations with security and customization requirements, find this appealing.

Cautions

- **Cloud strategy:** Progress' cloud strategy can be confusing to both existing customers and prospects due to multiple hosting options, from on-premises to self-hosted to PaaS to SaaS. Client adoption of its newest SaaS with Next.js release is lagging compared with other vendors in this market, and the majority of its customers prefer the Microsoft PaaS stack.

- **Brand awareness:** Progress has low brand awareness. Many prospects do not consider it in their DXP selections and shortlists, even when there is a good fit. Where it meets their core use cases, prospects should carry out due diligence.

- **Developer-focused legacy:** Progress' history is as a developer-centric DXP. Although it has added many marketing-related features in recent years, it doesn't offer the same breadth of marketing-focused features and solutions as some of the larger marketing-focused DXP vendors featured here.

Sitecore

Sitecore is a Visionary in this Magic Quadrant. Its DXP is called Sitecore Digital Experience Platform and includes features across content management, search, personalization and customer data management, among others. Parts of its technologies are available as managed service PaaS, while other products are available as SaaS. It is headquartered in San Francisco, California, with a presence in EMEA and Asia/Pacific. Its clients tend to be midsize to large enterprises primarily in banking, healthcare, manufacturing and technology services.

Strengths

- **Innovation:** Sitecore has made strides in innovation and Completeness of Vision due to recent product developments, including a visual builder, AI for marketer intelligence, a new analytics dashboard and a visual forms workflow tool.

- **Composable DXP:** Sitecore has advanced in its composable DXP vision. It offers composability at product level and at PBC level where these are available as stand-alone components, and plans to expand its marketplace.

- **B2B appeal:** Sitecore has experienced growth and traction in B2B and authenticated experience scenarios. It offers security and compliance, as well as deep integration and customization features that B2B customers find appealing.

Cautions

- **XM Cloud SaaS transition:** Some existing Sitecore customers have reported high efforts in transitioning to its newer SaaS offering, Sitecore XM Cloud. Customers also cite higher costs compared to PaaS or self-hosted licensing, and significant effort required to migrate existing legacy Sitecore XP and XM implementations.

- **Complex product portfolio:** Sitecore is navigating a complex product portfolio, following multiple product acquisitions and continuous integration efforts, which can see some feature overlap in content creation tools. Prospects should ensure that they are clear on which content creation features they need between Sitecore Content Hub and XM Cloud for their use cases.

- **Expert skills required:** Sitecore's learning curve can be steep, requiring specialized expertise. This can lead to continued reliance on the partner channel for initial implementation, enhancements and integrations if organizations don't have enough on-staff development resources.

Squiz

Squiz is a Niche Player in this Magic Quadrant. Its DXP platform is Squiz Digital Experience Platform, which includes content management, search, personalization, customer data management and integration with accelerators for the core verticals served. It is available in a SaaS or on-premises deployment model. It is headquartered in Sydney, Australia, and has a small presence in North America and EMEA. Squiz DXP is most often deployed by midsize organizations in government, energy and utilities, and education.

Strengths

- **Sector expertise:** Squiz has a good understanding of the needs and system integration requirements of higher education, local government and energy and utilities clients among other verticals, with accelerators available to decrease time to value.

- **Licensing flexibility:** Squiz DXP licensing is flexible and does not preclude clients from accessing any of the more advanced features of the platform, enabling a "try before you buy" approach as customer demands and priorities change.

- **AI innovation:** Squiz provides AI tools that help with migration from other systems, including analysis of HTML for common traits for components. This provides potential savings on a significant area of work for most DXP implementations.

Cautions

- **Innovation:** While improved, Squiz's innovation pace remains behind some others in this report. Prospects that are looking to differentiate their digital experiences may need to integrate with other solutions for more advanced functionality.

- **Complex functionality:** Some functional areas in Squiz DXP are more co-dependent than the majority of vendors in this report. Prospects must examine the dependencies and the functionality needed to meet their use cases.

- **Limited market visibility:** Squiz DXP is rarely a candidate in DXP selections outside of the regions in which it has offices. Prospects must examine Squiz's ability to serve them in their region.

Uniform

Uniform is a Visionary in this Magic Quadrant. Its DXP, called Uniform, includes content management, personalization, analytics and optimization, and integration. Its differentiated approach, with Mesh API integration, puts assembly and configuration ahead of coding for interchangeable no-code integrations. It is available as SaaS. It is headquartered in San Francisco, California, with a small presence in North America and EMEA and serving mostly enterprise organizations in retail, and communications, media, and services.

Strengths

- **Composable flexibility:** Uniform allows the gradual transition to a composable approach as multiple CMS or DAM instances can be the source of content. It provides reusable components that are not reliant on back-end systems or the front-end language — ideal for clients that are transitioning from monolithic solutions and that must reskill their development teams.

- **Developer-friendly:** Uniform provides front-end developers with the tools they need to enable their nontechnical business users, which decreases the reliance on developers for simple tasks, and increases their autonomy. This avoids gaps in some composable implementations where marketing requires developers, and developers must focus on differentiating applications, not daily marketing updates.

- **AI innovation:** Uniform features powerful AI agents that can help users create content and experiences — for example, the webpage layout. It can also understand performance and suggest improvements without discovering trends in reports and hypothesize next actions.

Cautions

- **CMS maturity:** Uniform's CMS is relatively new and does not have the maturity or customer usage of others in this report. Prospects with complex content management needs, such as defining rules and relationships between content, should consider integrating a different CMS.

- **Non-native capabilities:** Uniform's clients must supplement with other providers for capabilities that are not provided natively (such as customer journey analytics and customer data).

- **Uncertain future:** Uniform Systems is a startup vendor with an uncertain future as larger vendors add similar capabilities that differentiate Uniform Systems to their DXPs. Prospective buyers should perform due diligence to assess how it serves their organizations' implementation needs if a partner is required.

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

- Builder.io

- Contentful

- Contentstack

- Pimcore

- Uniform Systems

Dropped

- **Bloomreach:** Dropped because it no longer goes to market as a DXP and does not fulfill this requirement.

- **Crownpeak:** Dropped because it failed to meet the revenue growth criteria this year.

Inclusion and Exclusion Criteria

Business criteria:

- **Revenue:** Each vendor's DXP offering must have generated revenue of at least $20 million, with at least 3% year-over-year revenue growth in the 12 months leading up to June 2024, or revenue of less than $20 million, with at least a 20% year-over-year revenue growth in the 12 months leading up to June 2024. Revenue includes cloud subscription revenue. Perpetual licensing, professional services, training, onboarding and infrastructure/hosting revenue are excluded. The vendor must have acquired at least 10 net new customers in the 12 months leading up to June 2024.

- **Market presence:** Each vendor had to have been marketing and selling its DXP product since at least June 2021.

- **Geographic coverage:** Each vendor must have a market presence in at least two of the following regions: North America, Latin America, Europe, Middle East and Africa, Asia/Pacific and Japan. Regional market presence is represented by dedicated offices and employees and/or partners in a region. At least 20% of a vendor's total revenue must come from at least two of these regions.

- **Partner ecosystem:** Each vendor must demonstrate the ability to deliver implementation support for customers via a certified partner ecosystem containing at least 20 implementation agencies and systems integrators.

- **Vertical market coverage:** At least 20% of vendor revenue must derive from at least three of the following verticals: banking and securities, communications, media and services, education, government, healthcare, insurance, manufacturing and natural resources, retail, transportation, utilities and wholesale trade.

- **Ecosystem activity and market interest:** Each vendor must have an active ecosystem around its DXP, as evidenced by Gartner's assessment of the market. This ecosystem may include aspects such as community forums, books and seminars, as well as client, partner and channel activity (by IT services firms, systems integrators, design agencies and advisory firms). Gartner also considers the degree of market interest in each vendor's DXP, as measured by the number of end-user client inquiries to Gartner analysts made via a Gartner call center or at Gartner events.

- **Go-to-market approach:** Each vendor's go-to-market approach must demonstrate explicit mentions of its DXP in its go-to-market activities, such as positioning, marketing, messaging, pricing and packaging for its DXP. We examine aspects such as thought leadership, product marketing and product management, public presentations, events, customer experience, digital presence, social media presence and sentiment, partner channel, word of mouth, and sales strategy.

Product criteria:

- **Product packaging:** Each DXP's native product capabilities must be available as an integrated product, under one product name.

- **Use-case support:** Each DXP must be able to support, as a cohesive and integrated product, both digital marketing and authenticated experience use cases.

- **Product capabilities:** The DXP must have:

Natively:

- Content management 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.

- Composable architecture for a modular and API-first approach, allowing for a set (or sets) of packaged business capabilities (PBCs) that are discrete, task-oriented and independently deployable.

- Support for multiexperience presentation, delivery and assembly of digital experiences via hybrid and/or headless capabilities.

- Cloud capabilities: Each DXP must be available for cloud deployment as SaaS or PaaS managed services for deployment versatility, scalability and elasticity, cost-efficiency,

improved time to market, and rapid innovation associated with cloud computing.

Either natively or via integrations (including with OEMs):

- Account service, including registration, login and password management with authentication and access control.

- Analytics and optimization.

- Customer data management.

- Customer journey mapping.

- Navigation and search.

- Personalization and context awareness.

- Practical applied AI.

- Security and access controls.

Evaluation Criteria

Ability to Execute

Organizations evaluating DXPs have wide-ranging requirements, as they often need to support multiple audiences. Broad functionality supporting different DXP deployment scenarios, long-term viability, a demonstrated track record of meeting customer needs, and an expanding market presence are important aspects of Ability to Execute in this market.

Product or service: This criterion concerns core products that compete in the DXP market. Included for consideration are current products, quality, feature sets, skills, etc. Products can be offered natively or through OEM agreements and partnerships. Product assessments focus on essential DXP functionality, integration, scalability, manageability, security and ease of deployment. Special consideration is given to product integrity, given the tendency of some to provide a collection of disconnected products and features, rather than a cohesive platform.

Overall viability: This criterion includes an assessment of a vendor's financial health, overall success and product vision, together with the likelihood that it will continue to invest in its

product. The assessment concerns both a vendor's overall financial health and the financial and practical success of the relevant business unit. During the assessment, the organization's cash and equity position, growth in the market, management, and financial strategy are evaluated.

Sales execution/pricing: This criterion relates to a vendor's capabilities in all sales activities and the structure that supports them. Included are deal management, pricing and negotiation, presales support, and the sales channel's overall effectiveness. Assessments are also made of the quality of the vendor's sales force, the sales force's alignment with the DXP strategy, market share, and the simplicity and predictability of pricing schemes.

Market responsiveness/record: This criterion concerns a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. It also considers the vendor's history of responsiveness to changing market demands. In addition, it considers the range and level of success of enterprise customers that use the vendor's DXP.

Marketing execution: This criterion assesses general awareness of the vendor in the market, as well as any negative or positive perceptions of the vendor. It examines the clarity and efficacy of the vendor's programs designed to convey DXP messaging in order to influence the market, promote a brand, increase awareness of products and establish a positive identification in the minds of customers. This mind share can be created by a combination of publicity, promotional activity, thought leadership, social media use, referrals and sales activities. A clear understanding by existing and prospective customers of the vendor's offerings and their development trajectory indicates successful marketing execution.

Customer experience: This criterion concerns products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. It assesses customer satisfaction, the quality of supplier-buyer interactions, technical support and account support. Other aspects examined include ancillary tools, documentation, customer support programs, customer success programs, availability of support communities and SLAs.

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

Table 1: Ability to Execute Evaluation Criteria

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 2025)

Completeness of Vision

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

Market understanding: This criterion assesses a vendor's demonstrated ability to understand and anticipate customer needs and to translate them into products and services. Vendors with a clear vision for the market listen, understand customer demands, and shape or enhance market changes using their vision. Vendors with the clearest DXP vision articulate their ambition while also listening and responding to buyer demands, anticipating emerging needs, and reacting with an understanding of business demands, ecosystems and the competitive landscape.

Marketing strategy: This criterion looks for clear, differentiated messaging that is consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements. An effective marketing strategy is crucial to articulate differentiation from other DXP offerings and outmoded approaches to building and managing experiences specific to web and mobile presences.

Sales strategy: This criterion looks for a sound sales strategy based on a demonstrated sales methodology that uses appropriate networks, including direct and indirect sales, marketing, service, and communication networks. It also assesses partners that extend the scope and depth of a vendor's market reach, expertise, technologies, services and customer base. In situations where a vendor offers multiple products geared toward DXP initiatives, it is essential to avoid channel conflict.

Offering (product) strategy: This criterion looks for an approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements. The DXP market favors offerings that meet our core platform criteria and those that are integrated and rationalized, yet provide easy integration and extension capabilities, thus are interoperable. Product and solution packaging are also important considerations.

Business model: This criterion examines product revenue growth and the ease of doing business with customers. We also look for a strong partner ecosystem that amplifies the vendor's go-to-market strategy. We examine how the business model is aligned with the business objectives and requirements of existing and prospective DXP customers.

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

Innovation: This criterion looks for direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, and defensive or preemptive purposes. DXPs enable and exploit innovation in modern architecture, analytics, AI, knowledge graphs, context awareness, the Internet of Things and user experience design to offer differentiated, continuous and engaging digital experiences.

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

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	NotRated
Vertical/Industry Strategy	Medium
Innovation	Medium
Geographic Strategy	High

Source: Gartner (January 2025)

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 a range of 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 technologies. However, they are lacking in terms of some aspects of their offerings, service and support, and/or business and partner ecosystems, which impairs their Ability to Execute.

Niche Players

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

Context

This Magic Quadrant evaluates vendors that meet Gartner's inclusion criteria for the DXP market. It is intended to aid selection decisions about vendors and products. Application leaders focused on digital experience and customer experience initiatives should:

- Study the evaluation criteria by which we have determined each vendor's Ability to Execute and Completeness of Vision.

- Evaluate the vendors' strengths and cautions.

- Assess vendors in any of the four quadrants, with a focus on those that align with their requirements and goals.

The companion **Critical Capabilities for Digital Experience Platforms** aids vendor selection from a use-case and capability perspective. It should be used in conjunction with this Magic Quadrant.

Market Overview

Organizations increasingly require flexibility in the solutions they deploy to support the variety of modalities and channels across customer journeys. Most buyers require a DXP to manage and coordinate digital experiences, even if there are multiple solutions that power that experience. The market dynamics for clients procuring and deploying a DXP have changed, prioritizing cloud, interoperability and integration, and usability.

In 2024, the DXP market was influenced by these trends:

- **SaaS:** There has been a notable shift toward software as a service with managed PaaS as a minimum as this can achieve the same objective and provides flexibility of customization. This reflects a growing preference among clients to avoid the complexities, operational demands and expense of self-hosting and performing software upgrades.

- **Composable architecture**: Accelerated growth has been driven by two primary factors. First, established DXP vendors have focused on decomposing monolithic architectures into modular, independent components. Second, headless CMS vendors have rapidly expanded their functionality to compete and integrate, not only with the broader ecosystem, but with their own independently developed, or acquired, PBCs.

- **Integration and orchestration:** Integration efforts, including those at the UI level, have further increased the adoption of composable architecture. By enabling cohesive experiences across disparate modules, services and sources, these integrations ensure that nontechnical users benefit from a unified interface, while organizations maintain a modular back end by using orchestration tools to automate many of the tasks.

Acronym Key and Glossary Terms

CDP	Customer data platform
CMS	content management system
CX	customer experience
DAM	digital asset management

DXP	digital experience platform
PBC	packaged business capability

⊕ Evaluation Criteria Definitions

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