

Selecting a Digital Experience Management Platform Solution, 2022–23

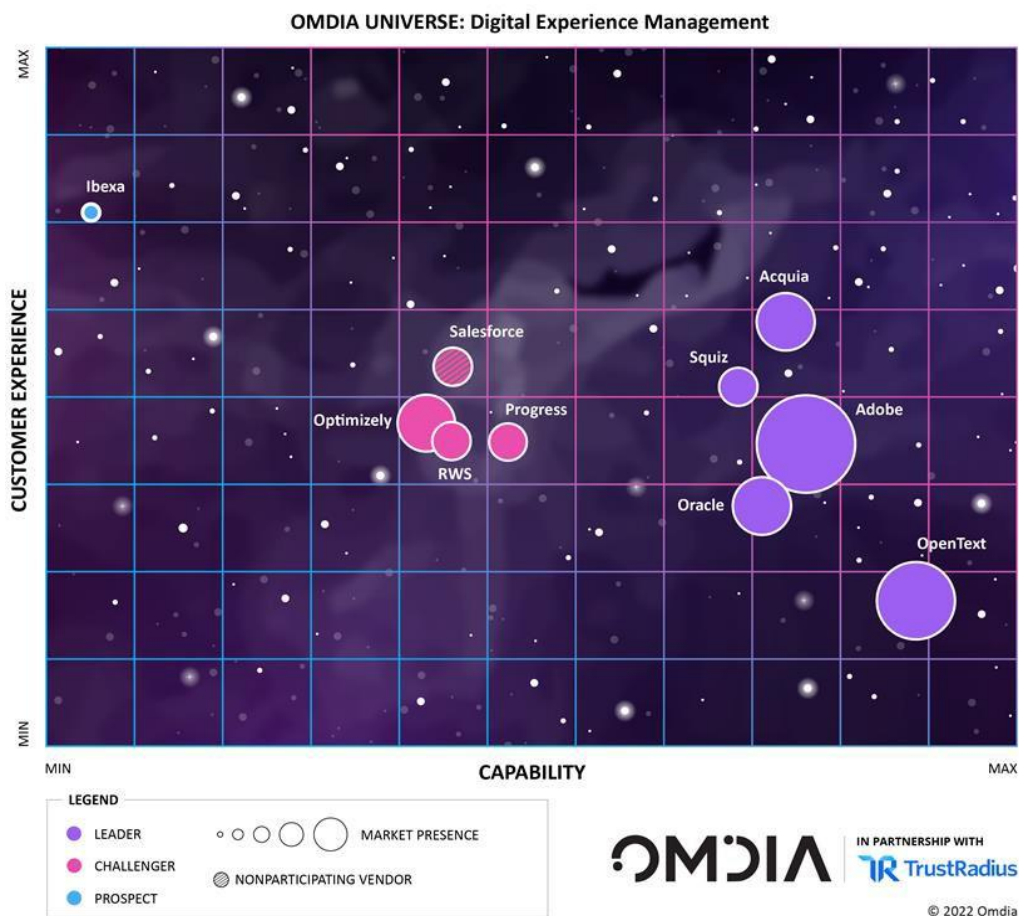
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Summary

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.

Vendor analysis

Oracle (Omdia recommendation: Leader)

Oracle should appear on your shortlist if you have other Oracle products and want extensive DXM capabilities with a DAM system that can handle vast quantities of assets.

Overview

In terms of revenue, Oracle is a very large vendor with a huge portfolio of products that includes software such as DXM, e-commerce, marketing automation, CRM, and ERP, as well as the Oracle Cloud, for deploying its software. However, revenue for its DXM portfolio is much smaller, and in this regards Oracle is a medium-sized vendor. The Oracle Cloud Infrastructure provides a set of complementary cloud services including analytics, an API gateway, application migration, and archive storage. In addition, the content services platform can be deployed in Oracle's Cloud@Customer, which allows customers to run all Oracle Cloud Infrastructure public cloud services and Oracle Fusion SaaS applications in their own data centers. Included are all the tools required to run Oracle and third-party applications without the need to move to the public cloud. Traditionally enterprises have been slower to move content management applications to the cloud than applications in other technology areas, and this option allows enterprises to run cloud-native applications in a cloud environment in their own data centers. It also makes it easier to migrate to the public cloud at a later date.

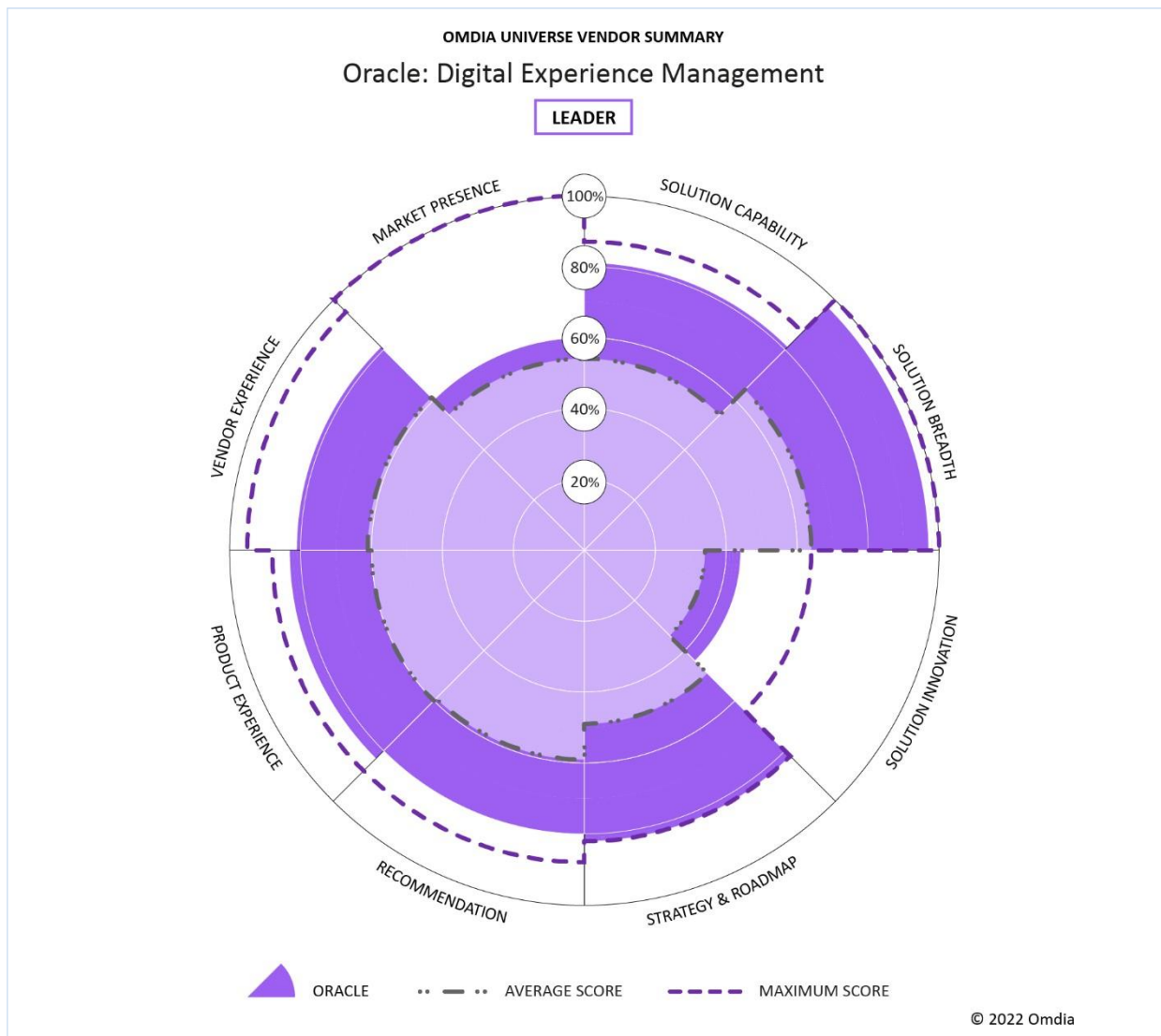
Strengths

Areas of particular strength for Oracle are DAM, cloud capabilities, and AI. Oracle is a newcomer to the DAM market and the fact that it is one of its strongest areas is testimony to the amount of work its R&D team has put into developing its capabilities. There are areas that will be enhanced over time, but there are already some strong features. Oracle takes a different approach to most other vendors as it has a single repository for any type of content or asset called Asset Repositories. Within a repository, the asset types, categories, and taxonomies are defined along with the channels in which they will be published or delivered and the workflow processes that will be applied to the assets. There can be multiple asset repositories, which can be configured differently, and assets can be copied or moved between repositories. Assets can be added to one or more collections within a repository, and a single asset can belong to more than one collection and/or taxonomy. Assets are automatically tagged by the Oracle Content Management's AI/ML platform when they are added to a repository, although additional tags can be applied either individually or in bulk. Images and videos can be edited through the web UI or using Adobe Creative Cloud via an add-on extension. Meanwhile, Oracle Sauce Video provides a video creation and curation platform that works with internal and external contributors. It allows video content to be ingested or created, and content can also be edited or assembled. Once complete the videos are added to an Oracle Content repository.

Oracle has its own cloud technology, Oracle Cloud Infrastructure, which provides hosting and data

centers with its SaaS solutions sitting on its IaaS and PaaS offerings. Oracle Content Management is available as a multi-tenant solution in the Oracle Public Cloud. Oracle has a large and growing number of databases with 37 cloud regions currently available, data centers in 20 countries, and seven more regions planned by end-2022. Customers can deploy instances of the service in any of Oracle’s global data centers. The software can also be deployed in a private cloud via Cloud@Customer. Oracle IaaS provides a complete selection of servers, storage, networking fabric, virtualization software, operating systems, and management software to support diverse private cloud operations. Integration with external systems including Adobe Creative Cloud, Oracle CX Apps, Box, Microsoft Products, Salesforce, and commerce applications are supported. In addition, the SDKs and REST APIs can be used to build custom integrations. Support is available 24/7 through a self-service portal, by phone, as well as named resources. Pricing is based on the number of seats sold in 5,000 asset bundles.

Figure 8: Omdia Universe ratings – Oracle



Source: Omdia

AI/ML capabilities are embedded throughout the platform and are a core capability. The technology is used in autotagging images, NLP-based authoring recommendations of images, based on the content being authored, and NLP-based classification recommendations for content and documents within customer-created taxonomies. Computer vision–based visual search is also available; the search capability supports the creation of content apps on top of the platform with AI/ML functionality helping content creators locate the required asset. Oracle Infinity Behavior Intelligence captures real-time behavior and applies intelligence to that data to offer recommended actions to enhance the customer experience. Probability scores are applied to predict the likelihood that a conversion will occur or a customer will reach a specific objective. VBCS is integrated with Oracle Integration Cloud to provide a workflow service that can be called directly from a form. A set of outgoing webhooks can be used to send event notifications to external applications. These are provided for content publishing, content lifecycle, site publishing, and prerendering events, and can be used to incorporate AI features into the DXM solution. The current AI capabilities are included in the subscription pricing for Oracle Content.

Limitations

Although AI and DAM are already strong areas for Oracle, there are areas in which the capabilities would benefit from enhancements, particularly AI, and where Oracle has plans to add voice to text capabilities out of the box for video-to-text transcriptions that will enable closed captioning of videos and searchable videos in DAM. Other current limitations that will be addressed are video tagging based on the objects in a video as well as using AI to classify digital documents and extract key data for forms recognition. Some vendors already have these capabilities, and the addition of these features to its platform will greatly enhance it.

Oracle does not include dedicated social media monitoring—it requires a third-party product. Oracle integrates with many applications in its portfolio such as CRM and ERP products, but it does not have as many integrations with third-party products as some of its competitors. Oracle also does not have its own IRM capability and enterprises will need to use the out-of-the-box webhooks to integrate with third-party IRM systems such as FADEL.

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)

Author

Sue Clarke, Associate Senior Analyst, Enterprise IT

askananalyst@omdia.com

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Contact us

omdia.com

askananalyst@omdia.com