Magic Quadrant for Web Content Management

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Web content management is a foundational technology for every digital business. This Magic Quadrant will help application leaders in charge of digital workplace applications find the most suitable WCM vendor for their needs.

Market Definition/Description

Gartner defines web content management (WCM) as the process of creating, managing and delivering content over one or more digital channels through the use of specific management solutions based on a core repository. These solutions may be procured as commercial products, open-source tools, cloud services or hosted services.

The functionality of WCM solutions goes beyond simply publishing webpages. It also includes:

- Content creation functions, such as templating, workflow and change management

- Repositories that organize and provide metadata about content

- Library services, such as check-in/check-out, version control and security

- Website management features, such as layout, menus and navigation

- Content deployment functions

- Personalization and analytics capabilities

- The ability to integrate well, via APIs, with adjacent technologies such as digital commerce platforms, social media platforms, marketing automation platforms and broader digital experience platforms (DXPs)

- Hybrid (traditional and headless) and pure headless capabilities for API-driven omnichannel content delivery

Magic Quadrant

Figure 1. Magic Quadrant for Web Content Management

Vendor Strengths and Cautions

Acquia

Strengths

- Acquia is the primary commercial vendor behind the open-source Drupal platform. Its interactions with the broader Drupal community are symbiotic and effective. Surveyed reference customers for Acquia reported a strong affiliation with this broader community and consider it to be a strong differentiator for WCM selection processes.

- Acquia has an excellent understanding of the WCM market, backed up by a product vision and roadmap that closely reflect the key market trends.

- Acquia offers a good combination of value-added capabilities for the core Drupal platform, its own Acquia Lightning distribution, its own personalization engine and the recently acquired Mautic for marketing automation. These are in addition to its customer journey mapping tool, Acquia Journey.

Cautions

- Although Acquia markets itself as an open-source company, its pricing can resemble that of other Leaders in the Magic Quadrant. Prospective customers should examine Acquia's pricing proposals carefully to ensure they subscribe only to the parts of its offering that they need.

- Despite rising demand from organizations to host Drupal in a private cloud, Acquia does not offer this deployment model. Instead, it offers virtual private network (VPN) support through its Acquia Cloud Shield product.

- Some existing and prospective customers report confusion about the value proposition of Acquia, as compared with open-source Drupal. This highlights Acquia's challenges with regard to messaging and marketing execution.

Adobe

Strengths

- Adobe Experience Manager (AEM) Sites is a highly regarded WCM offering. It is especially valued by organizations with elevated levels of digital maturity that want to design and deliver sophisticated digital experiences across multiple touchpoints in the customer journey, including the web and in-venue interactive screens.

- Adobe's continued investment in its artificial intelligence (AI) and machine learning (ML) framework — Adobe Sensei — offers tangible results and capabilities for WCM tasks such as intelligent content authoring and intelligent content delivery.

- Adobe's acquisitions of Marketo and Magento, finalized in 2018, reflect a thorough and accurate understanding of the WCM market as the company positions itself to provide capabilities that support the full customer life time journey.

Cautions

- Adobe continues to charge premium prices for AEM Sites, as well as for other parts of the Adobe Experience Cloud that are tightly bundled. Prospective buyers should examine Adobe's relatively new Digital Foundation offering. In addition, such buyers should require a breakdown of pricing proposals to ensure that any ongoing investment is aligned accurately with the evolution of the required solution.

- Some AEM customers have reported difficulties with getting the most out of the solution, due to a lack of guidance from Adobe. Decision makers should examine all the efforts that Adobe is making to remedy this situation. These include the Experience League enablement program, mandatory Launch Foundation Services attached to each contract, and more thorough interactions with reference customers in order to share best practices.

- Adobe has made tried to minimize the complexity of AEM's implementation and use by introducing additional capabilities such as Core Components and on-demand educational programs. However, most Adobe customers still rely heavily on implementation partners to navigate this complex piece of technology. This reliance can come at a hefty price, as true AEM expertise is highly sought after and the best teams are rarely available.

Automattic

Strengths

- Automattic's WordPress.com VIP is highly regarded for its user experience and ease of use, while offering a vast array of modular, extensible plug-ins. It is an attractive offering for departments within large organizations and for midsize companies.

- Automattic offers highly competitive pricing that enables organizations to begin in a small way and then expand their solution footprint when required.

- Automattic is investing in DevOps support and tools for, among other things, database optimization, autoscaling, backups, security and performance monitoring, as well as a global content delivery network. In this way, it can provide cloud self-service tools that its customers desire.

Cautions

- Automattic and WordPress are still falling short in terms of appeal to multidisciplinary teams. Although it is typically successful at the business user/content manager level, Automattic has yet to attract cross-functional teams concerned with digital marketing, customer service, digital commerce, DevOps, continuous Integration/continuous development (CI/CD) and other facets of the typical modern digital business.

- Automattic lacks the depth, in terms of functionality, security, extensibility, developer tools and integrations, that is often required by large enterprises with large-scale implementation plans and complex scenarios.

- Automattic is perceived as failing to adequately address existing and prospective customers' lingering concerns about security and related processes and certifications. This is despite HackerOne security initiatives aimed at improving platform security.

Bloomreach

Strengths

- Bloomreach Experience Manager (brXM) has a practical, yet powerful UI for managing complex multisite, multilingual sites, projects and campaigns. Its UI does not suffer from the complexity typical of many UIs in this market.

- The API-driven, standards-based and open architecture of brXM enables a wide array of content delivery options for multichannel digital experience scenarios.

- Bloomreach has done well to highlight the benefits — and even the necessity —- of incorporating AI into their offering. This focus on AI has resulted in strong personalization capabilities within brXM.

Cautions

- Awareness of Bloomreach's brand is relatively low in the WCM market. Consequently, brXM is absent from many customers' shortlists, even in some contexts where it would be a good choice.

- Bloomreach is struggling to expand its partner ecosystem for implementation and system integrations. Feedback from the market suggests that availability of Bloomreach's partner resources remains low, relative to those of its primary competitors. Decision makers should undertake a thorough analysis of such resources, their experience and availability, to help ensure a high-quality deployment.

- Bloomreach, which historically has concentrated rather narrowly on the retail and e-commerce sectors, has made only modest progress into other verticals. Decision makers must examine Bloomreach's ability to support their specific industry, while assessing its overall horizontal strategy for product development and partner channel growth.

CoreMedia

Strengths

- Nontechnical users appreciate the comparatively clean and intuitive UI of CoreMedia Content Cloud, which combines a variety of features spanning a wide range of external-facing use cases.

- CoreMedia has made good progress in growing its ecosystem of partners, in terms of both technological alliances and implementation.

- CoreMedia's product strategy and resulting architecture reflect a deep and accurate understanding of the most important market trends. The vendor has struck a good balance between the benefits of headless capabilities and the need to empower business users through more intuitive UIs that enable users to view various content renditions.

Cautions

- CoreMedia's penetration of North America — where most of the WCM market's revenue is generated — is limited. Although it has made some investments in this area, decision makers should ensure there is sufficient local support for implementation as part of their selection process.

- CoreMedia's marketing execution has not produced the same level of brand awareness as is enjoyed by some of its competitors. CoreMedia is often omitted from WCM shortlists shared by customers with Gartner, even in contexts in which its offering would be a good choice.

- CoreMedia is relatively late in introducing AI components to its core offering. Although it plans to speed up in this regard, prospective buyers with related requirements should ask about the progress of such plans.

Crownpeak

Strengths

- Crownpeak customers achieve a shorter time to value than those of some of the other WCM vendors in this Magic Quadrant. Customers identified Crownpeak's low-code, component-based approach, packaged integrations, decoupled, front-end-agnostic architecture and SaaS model as key to their ability to quickly derive value from the Crownpeak Digital Experience Management solution.

- Reference customers scored Crownpeak highly, compared with many other vendors, for direct services and support. They praised its quick response times and good understanding of business needs.

- Crownpeak has done well to "change the narrative" around WCM by emphasizing the quality and integrity of delivered digital experiences, in addition to catering to some aspects of digital governance, such as consent management.

Cautions

- Crownpeak's partner ecosystem is smaller than those of many of its closest competitors. Gartner rarely sees increasingly influential constituencies, such as digital agencies, recommend Crownpeak. Some reference customers stated that a shortage of third-party expertise limited Crownpeak's appeal.

- Crownpeak's marketing execution has yet to catch up with its improved marketing strategy. Crownpeak's mind share among WCM-buying audiences is relatively low, compared with other vendors in this Magic Quadrant.

- Crownpeak needs to extend its geographic presence. Its business is concentrated in the U.S., and its presence in Europe is relatively small, despite attempts to increase its investment in this region. Organizations outside the U.S. should ensure there are adequate local support resources for their needs.

Episerver

Strengths

- Episerver offers a broad product portfolio for content management, digital marketing and digital commerce, with packaging and bundling that is well aligned with typical customer use cases and maturity levels. Episerver's business-savvy packaging stands in favorable contrast to that of vendors whose offerings are technology-driven and often very confusing.

- Episerver is well regarded for its usability by both IT and business teams. Advanced experience management capabilities, such as event triggering, AI-based personalization and customer journey analytics, are incorporated into typical WCM processes and roles, rather than requiring specialized, dedicated processes and expertise.

- Episerver's simple, transparent and predictable subscription pricing readily aligns with business metrics (for example, page views and SKUs). Its pricing strategy appeals to large enterprises and to growing midsize organizations.

Cautions

- Episerver lags behind its closest competitors in terms of brand awareness and presence. Despite a strong business and sales pipeline, Episerver appears less frequently on the longlists and shortlists that Gartner reviews than do other Leaders, even when Episerver appears a suitable choice.

- Episerver's partner ecosystem is less comprehensive and less diverse than those of its closest competitors, with fewer large and well-known consulting firms and digital agencies than large enterprises would like. Decision makers for WCM efforts should ask Episerver to recommend suitable partners in the context of the required solution.

- Some customers have concerns about Episerver's sales and service, including a relative lack of localized support in some regions and of training resources for end users. Decision makers for WCM initiatives should examine Episerver's global learning management system with a view to addressing this issue. In addition, they should discuss with similar customers how best to maintain interaction with the right support personnel in Episerver's organization.

e-Spirit

Strengths

- e-Spirit has done well to advance its architecture for rapid deployment and faster development. Additionally, it now supports content as a service for hybrid/headless content delivery.

- e-Spirit has made good progress by offering more capabilities to appeal to business buyers, with functionality geared especially for marketers (for example, personalization, campaign management and journey mapping).

- e-Spirit's flagship product, FirstSpirit, offers a high level of interoperability with adjacent technologies. The company's FirstSpirit Intelligent Content Engine (ICE) product is based on an OEM agreement with Dynamic Yield.

Cautions

- Although e-Spirit has made progress in North America, largely via partnerships, the market's awareness of this vendor remains low, relative to other providers. Also, e-Spirit's penetration of this important regional market is less than has been achieved by some of the other European vendors featured in this Magic Quadrant.

- Whereas much of the WCM market has grown by appealing to marketers and leaders of customer experience initiatives, e-Spirit's growth depends largely on attracting IT departments. This may reduce e-Spirit's potential for continuous improvement in the areas of usability and advanced features for marketing and content managers focused on the customer experience.

- e-Spirit's cloud maturity is lower than that of other vendors in this Magic Quadrant. Decision makers interested in cloud WCM should carefully examine e-Spirit's cloud capabilities as they relate to scalability, SLAs and functionality.

eZ

Strengths

- eZ's pricing strategy is clear, intuitive, predictable, reasonable and flexible, compared with those of other vendors in this Magic Quadrant. The steps this vendor is taking to increase its investment in its product and corporate strategy are sensible and well defined, given demand from midsize and large enterprises.

- eZ possesses broad experience and deep expertise in the digital publishing and digital media domain.

- eZ's business model, which combines an established open-source software platform with commercial backing for support and hosting, is in high demand in the WCM market. This demand is likely to continue to grow.

Cautions

- Most of eZ's revenue originates from Europe, the company's presence in North America being small in comparison to its competitors. Organizations considering eZ should inquire about the availability of local and domain-relevant expertise and the timely availability of support.

- eZ's open-source community is not as large or active as those of other vendors with open-source offerings in this Magic Quadrant. This community offers limited involvement and support to its customers, which are mainly small and midsize businesses that, often lacking internal development resources, want to rely on eZ's community for advice and guidance.

- eZ's overall market presence remains low, as does awareness of its brand. This could limit its Ability to Execute in the long term.

Kentico Software

Strengths

- Kentico Software's flagship product is the Enterprise Marketing Solution (EMS). It offers native, built-in digital experience management functionality, including support for basic digital asset management (DAM), workflows, online communities, analytics, digital commerce and digital marketing, as a complement to its core WCM functionality.

- Kentico's attractive, clearly defined pricing appeals to midsize organizations, as well as to large enterprises wishing to start with small investments. Kentico's reference customers rated the EMS and Kentico Cloud offerings highly for value for money, compared with other providers' offerings.

- A combination of factors, including comparatively low entry-level pricing, comprehensive native capability, and ease of use for business and IT professionals, makes Kentico particularly successful at selling to midsize organizations.

Cautions

- Kentico's dual-product strategy — with Kentico EMS available on-premises and hosted on IaaS, and Kentico Cloud available as SaaS — creates a disjointed product landscape that confuses some customers and complicates their buying or usage decisions.

- The downside of Kentico's packaged, "all in one" approach is that some organizations fairly quickly find it restricting when it comes to scaling and extending beyond relatively simple midmarket scenarios.

- As organizations increasingly rely on the partner channel and system integrators to implement Kentico's software, some customers are experiencing difficulty finding reliable and relevant partners in Kentico's comparatively small ecosystem.

Magnolia

Strengths

- Magnolia's relatively simple and flexible pricing makes its Java-based WCM solution a good choice for organizations looking to start small and increase their WCM investment as their requirements mature.

- Strong content modeling and multisite management capabilities make Magnolia suitable for organizations with multilingual, multisite, multiproduct scenarios involving delivery to multiple regions.

- Magnolia's headless, hybrid and omnichannel content delivery approach is comparatively strong. In addition, its offering is typically lighter to deploy, resulting in faster time to value.

Cautions

- Large enterprises typically don't perceive Magnolia as a good fit for scenarios with highly sophisticated digital marketing, digital business or CX requirements, especially in cloud-first scenarios. Market feedback suggests that Magnolia is more commonly chosen for midsize or enterprise departmental requirements.

- Magnolia rarely appears on the shortlists of Gartner clients, even — given its open-source roots — when it would be a good choice for open-source requirements.

- Outside Magnolia's home country of Switzerland and some parts of Europe, this vendor's geographical presence is limited, as is the market's awareness of its brand. Together with a relatively small partner ecosystem outside Europe, this makes Magnolia one of the weaker options for fulfilling global WCM requirements.

OpenText

Strengths

- OpenText has a broad information management portfolio to complement and extend the value of its TeamSite WCM solution. Its portfolio includes a content services platform and offerings for A/B and multivariate testing, DAM, identity and access management, and customer communications management.

- OpenText TeamSite is better equipped for authenticated experiences than most other vendors' products. Whereas much of the WCM market has focused on marketing functionality to attract anonymous users, OpenText's security and integration capabilities equip it better to support customers throughout their life cycle.

- OpenText TeamSite is well suited to complex B2B and business-to-business-to-consumer (B2B2C) scenarios. Recent developments bolstering the product's B2C value, such as intelligent asset tagging driven by ML and single page application (SPA) editing for React and Angular apps, should add value for customers.

Cautions

- OpenText's WCM market presence and reputation have declined, relative to other WCM providers. TeamSite is often perceived as a "legacy" system, and OpenText has done less than other vendors to capture the mind share of prospective WCM customers outside its installed base.

- Feedback from the market suggests that TeamSite migrations from on-premises to the cloud can be more complicated than is the case with other WCM systems. This is despite OpenText's November 2018 announcement of a "run anywhere," best-of-breed public cloud strategy, in addition to the OpenText OT2 cloud strategy.

- OpenText TeamSite's partner channel (including implementation, design and system integrators) has been progressively shrinking. This has resulted in some customers having to use the vendor's professional services organization.

Oracle

Strengths

- Oracle Content and Experience (OCE) represents an architecturally powerful rethinking of WCM in the context of the customer experience. Building on channel-agnostic content modeling and an API-first foundation, Oracle continues to innovate with a move to a pageless, dynamic experience assembly paradigm and AI-assisted content authoring.

- Oracle offers a broader set of capabilities to augment WCM than many other vendors. Oracle is well suited to organizations wishing to use as few vendors as possible to achieve a digital presence encompassing an entire customer journey.

- Oracle customers hold its offering in high regard for putting certain features, such as personalization, optimization and search capabilities, into the hands of business users.

Cautions

- Oracle's main focus is on the positioning of its larger Customer Experience (CX) product umbrella, rather than its WCM offerings. OCE is one element of the much larger Oracle Cloud Platform, which may not appeal to a typical WCM buyers.

- Oracle is moving its WCM customers from the on-premises WebCenter Sites (and broader WebCenter Suite) offering to the SaaS-based OCE. Although the number of cloud-only Oracle WCM customers is increasing, OCE is still maturing. Decision makers should take this into account as they plan their move to the cloud.

- The combination of multiple WCM products (such as WebCenter offerings) and the transition to OCE as a shared content service for the CX Cloud Suite limits Oracle's appeal as a WCM provider. It is likely to attract primarily organizations that treat Oracle as their dominant technology provider across many aspects of their IT landscape.

Progress

Strengths

- Progress has a good reputation among its customers for ease of deployment and usability across developer, administrator, content manager and marketing roles. Progress Sitefinity makes some normally complicated capabilities — such as those required for multilingual sites, integrations, personalization and actionable analytics —comparatively accessible and straightforward.

- Progress' expertise and background as a provider of development and data connectivity tools put it in a good position to help with WCM in the context of overall digital solution development.

- Progress Sitefinity is a compelling option for organizations with a focus on application development enriched by web content, personalization and advanced analytics.

Cautions

- Progress is a late adopter of WCM-related cloud options, having launched its Sitefinity Cloud WCM solution as a PaaS on Microsoft Azure as recently as the first half of 2019. Decision makers should carefully examine this solution's performance, scalability and roadmap to ensure it fits meets their requirements.

- Progress has made good progress in demonstrating its market understanding in a way that resonates with decision makers for WCM. However, in many cases, its overall higher-level positioning toward data connectivity, digital solution and application development is hard to reconcile with the demands of buyers with more traditional WCM requirements.

- Progress is not often shortlisted by Gartner clients, even when it would be a good choice from a Microsoft-centric technology perspective. A lack of awareness of its brand, together with the company's considerable focus on midsize scenarios, limits Progress' appeal to a wide audience.

SDL

Strengths

- SDL is making progress with the pragmatic application of AI and ML to content management and content translation tasks, such as content variation, summarization and classification, through the use of linguistic AI.

- Content APIs and GraphQL-based content delivery capabilities enable the use of SDL Tridion Sites in a headless manner (in addition to its traditional use as a classic decoupled architecture). This enables customers to access and deliver content from multiple repositories to multiple channels via APIs.

- With its BluePrint model, SDL Tridion Sites is well suited to organizations requiring global content creation, translation and delivery across many sites and regions.

Cautions

- SDL has largely focused on its translation software and services business, and therefore has been losing momentum in the WCM market. SDL rarely appears on Gartner clients' shortlists, even when the client's primary requirement is a multisite/multilingual use case.

- SDL's partner channel and ecosystem are weakening. Some SDL customers are finding it more difficult to locate an appropriate partner and increasingly depend on system integrators with rare, product-specific skills.

- Some SDL Tridion Sites reference customers report a lack of usability, multiple extra steps and clicks, and an outdated UI as major impediments to the adoption and usage of this offering.

Sitecore

Strengths

- Sitecore's platform has strong appeal to organizations across multiple industries and of various sizes. Sitecore is a popular inclusion in WCM shortlists and the recent release of its low- to mid-market offering, Sitecore KickStart, should help broaden this appeal even further.

- Sitecore's architecture and JavaScript Services (JSS) help organizations that need headless capabilities for multichannel delivery and general content agility. At the same time, Sitecore retains business-logic-level capabilities, such as advanced personalization, contextualization and content preview.

- Sitecore offers training and best-practice programs to ensure clients can put new features to effective use, in part through its Stepstone program and acquisition of Hedgehog, a consulting firm.

Cautions

- Sitecore's reputation for offering good customer experiences has been compromised significantly. Feedback from multiple market sources consistently indicates poor support for prospective buyers, partners and existing customers. Multiple sources also indicate challenges relating to below-average support resources, as well as product complexity.

- Sitecore's pricing has been an ongoing topic of concern, and Gartner regularly hears complaints about pricing complexity and a lack of transparency from buyers considering its software for first-time or continued use. Gartner has also received feedback from multiple sources that Sitecore is aggressively trying to drive adoption of its subscription-based pricing. In the process, the vendor has used questionable tactics and applied pressure that has upset some customers who currently have perpetual licenses for its software.

- Sitecore was slower to offer a full complement of cloud offerings than its direct competitors, and although it is doing well to catch up, the company's cloud transition is still underway. Many existing on-premises customers identify multiple difficulties — ranging from technical problems to the price — in moving to the cloud.

Squiz

Strengths

- Squiz's product vision accurately reflects organizations' priorities for WCM. It includes a focus on low-code development and API-driven interoperability to fit into more complex ecosystems.

- Squiz often appears on the shortlists of organizations in the government and higher education sectors, due to its low entry price and comparatively fast time to market.

- Squiz's Matrix content management system offering is evolving from a pure WCM system into a more feature-rich DXP with a focus on digital services across multiple channels.

Cautions

- Squiz's global presence is relatively limited, making it less of a viable choice for organizations located outside the vendor's key geographies, which include Australia and the U.K.

- Squiz has invested less heavily than its main competitors in an ecosystem of implementation partners. Decision makers should therefore ensure that sufficient program resources are available in all required regions.

- Squiz's marketing execution is relatively weak and awareness of its brand is relatively low. This results in Squiz sometimes not being considered for WCM when it would have been a good choice in terms of functional and technical suitability.

WP Engine

Strengths

- As an alternative to the purely open-source WordPress, WP Engine's WordPress Digital Experience Platform is growing strongly, with widening customer adoption in many regions, such as EMEA, North America and Asia/Pacific.

- WP Engine offers a comprehensive set of easy-to-use capabilities for business users, as well as developer tools and scalable infrastructure for IT professionals.

- WP Engine prioritizes security through a partnership with Cloudflare that provides security checks at four levels: web application firewall, content delivery network, distributed denial of service (DDoS) mitigation and Secure Sockets Layer/Transport Layer Security (SSL/TLS) encryption.

Cautions

- WP Engine's business strategy has used its grassroots connections with the WordPress community to expand its customer base. As a result, WP Engine remains significantly less well known than the leading WCM providers to the typical target audiences.

- Although WP Engine regards its offering as a DXP, it lacks many of the advanced capabilities required of a DXP. WCM buyers should carefully examine the functionality it offers, especially if they are considering WP Engine from a broader digital business perspective.

- WP Engine has many loyal reference customers, but upper-midsize and larger enterprises considering its offering should carefully examine its suitability for complex, global solution contexts.

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

- Magnolia.

Dropped

- IBM. IBM Web Content Manager is now owned by HCL Technologies; also, at the time of writing, IBM Watson Content Hub is scheduled for divestiture to Centerbridge in mid-2019.

Inclusion and Exclusion Criteria

The inclusion criteria that each vendor had to meet in order to appear in this Magic Quadrant were as follows:

- **Total WCM software revenue:** The vendor's WCM revenue had to exceed $17 million in 2018.

    - Total WCM software revenue includes revenue generated from sales of WCM software and software maintenance and support services. More specifically, it comprises:

        - License revenue: Revenue from selling the right to use the software (on perpetual or term license contract).

        - Cloud revenue: Revenue from cloud services, including business process as a service (BPaaS), infrastructure as a service (IaaS), platform as a service (PaaS) and software as a service (SaaS).

        - Subscription revenue (excluding cloud): Annual fees for licensed, on-premises software, as well as license revenue for single-tenant managed services (such as hosting).

        - Technical support and maintenance revenue: Contract fees for support services (not including training), new versions, updates and upgrades.

    - Total WCM software revenue excludes revenue from professional services and the sale of products manufactured by other vendors. Additionally, revenue arising from customer requests for software changes is not considered, even if such changes are subsequently incorporated into the core WCM offering. Increases in software license charges as a result of such changes are, however, considered.

- **Geographic presence:** The vendor must have been in the WCM business for more than five years, with a presence in more than one geography for at least a year and a strategy that supports further geographic expansion. It had to actively market its WCM offering in at least two of the following three regions: North America; Europe, the Middle East and Africa (EMEA); and Asia/Pacific.

- **Vertical and horizontal capabilities:** The vendor had to actively market its products in more than two major vertical markets, and in more than one horizontal application category (such as e-commerce or customer self-service).

- **Ecosystem activity and market interest:** We gauged each vendor's ecosystem activity and market interest on the basis of an assessment of the market, including factors such as community forums, books and seminars, and client, partner and channel activity (IT services firms, system integrators, distributors, web interactive agencies and advisory firms). The level of interest shown by Gartner end-user clients, based on the number of inquiries received by analysts via the Gartner call center or at Gartner conferences in one-to-one meetings, was also taken into account.

- **Commercial availability:** The vendor had to have WCM software commercially available and reference customers that actively used the product in production scenarios. Some of these reference customers had to be of enterprise scale, with the number of contributing authors

exceeding 50 and the average monthly number of page views comfortably exceeding 500,000. Deployments supporting even larger numbers of users were deemed preferable.

From a functionality perspective, each vendor had to offer the following, at minimum:

- A WCM offering available as a stand-alone product or a suite of products.

- A content repository with basic library services, such as check-in/check-out and versioning.

- Authentication of users (authors, editors and reviewers) and assignment of permissions.

- Content authoring, through browser-based templates or via conversion from a word-processing application.

- Workflow sufficient for content review and approval.

- Conversion to HTML or XML and support of templates for web rendering.

- Support for Web Content Accessibility Guidelines (WCAG).

- Managed delivery of content to web servers or site management systems; this can include a native or built-in runtime environment or web application.

- Capabilities for multisite and multilanguage management.

- Web analytics and reporting capabilities.

- "What you see is what you get" (WYSIWYG) design capabilities, with the ability to modify and customize look, feel and behavior, independently of content.

- Support for multiple roles, including, for example, developer, administrator, editor, marketer and author in a distributed contribution environment.

- Support for content aggregation and syndication (via APIs, REST interfaces, RSS or similar).

- Ability to manage rich media in the context of web efforts; ability to support interaction with target audiences using various devices, channels and modalities in a headless fashion.

Evaluation Criteria

Ability to Execute

Ability to Execute measures how well a vendor sells and supports its WCM products and services globally.

We used the following criteria to assess Ability to Execute:

- **Product or service:** Evaluates product functions in areas such as:

  - Multisite and multilanguage management

- Analytics and reporting

- Design

- Content modeling

- Metadata management

- **Overall viability:** Includes an assessment of a vendor's financial health and overall success, together with the likelihood that it will continue to invest in its product.

- **Sales execution/pricing:** Evaluates a vendor's success in the WCM market, including:

  - WCM revenue and the installed base

  - Pricing

  - Presales support

  - Effectiveness of the sales channel

  - Level of interest from Gartner clients

- **Market responsiveness/record:** Evaluates how well a vendor's WCM offering matches buyers' requirements at the time of purchase. We assess each vendor's track record in delivering new functions when the market needs them. We also consider how a vendor differentiates its offerings from those of its major competitors.

- **Marketing execution:** Evaluates the clarity, quality, creativity and efficacy of a vendor's efforts to market its WCM offerings. We examine aspects such as thought leadership, word-of-mouth and sales activities.

- **Customer experience:** Evaluates functions or services within production environments, with regard to:

  - Ease of deployment

  - Operation

  - Administration

  - Stability

  - Scalability

  - Vendor support

  We assess this criterion, where possible, through qualitative interviews with vendor-identified reference customers. We also use feedback from Gartner clients and others that use — or have completed competitive evaluations of — the WCM offering.

- **Operations:** Evaluates the vendor's service, support and sales.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (July 2019)

Completeness of Vision

Completeness of Vision focuses on a vendor's potential and points to its future chances of success. A vendor may succeed financially in the short term without vision and a strategic plan, but it won't become a Leader. A vendor with average vision will both anticipate and respond to changes by noticing market trends and exploiting technology. A vendor with superior vision anticipates, directs and initiates market trends — particularly when its vision spans a range of areas — and capitalizes on product and service development.

We use the following criteria to assess Completeness of Vision:

- **Market understanding:** Evaluates a vendor's ability to understand buyers' needs and to turn that understanding into vertical and horizontal WCM products and services. Vendors that show the highest degree of vision listen to buyers, understand their wants and needs, and can shape or enhance those wants and needs. WCM vendors that show the highest degree of market understanding adapt to customers' requirements in areas such as SaaS, dynamic contextualized delivery and ease of use by nontechnical staff.

- **Marketing strategy:** Evaluates the extent to which a vendor articulates a differentiated message and communicates it consistently. We look for consistent communication throughout the organization and through its website, advertising, customer programs and positioning statements, as well as statements of direction and product roadmaps.

- **Sales strategy:** Evaluates the vendor's use of direct and indirect sales, marketing, service and communications to extend the scope and depth of its market reach.

- **Offering (product) strategy:** Evaluates a vendor's approach to product development and delivery, and how it emphasizes functions and features as they map to requirements for WCM. We also evaluate each vendor's development plans for the next 12 to 18 months.

- **Business model:** Evaluates the soundness and logic of a vendor's underlying business proposition. It also assesses whether the vendor offers synergies with other components required to drive a successful digital business strategy.

- **Vertical/industry strategy:** Evaluates how a WCM vendor uses its direct resources, skills and offerings to meet the specific needs of individual market segments, such as the media industry.

- **Innovation:** Evaluates a vendor's development and delivery of differentiated WCM technology to address critical customer requirements. We evaluate development in all areas of product capability, but particularly in areas of primary and secondary differentiation, such as:

  - Usability

  - Interoperability

  - Engagement analytics

  - Mobility and multichannel capabilities

  - Content delivery

  - Personalization

  - Architecture

  - Cloud capabilities

- **Geographic strategy:** Evaluates how a vendor meets the specific needs of geographic regions outside its home territory. We assess whether the vendor's partners, channels and subsidiaries are appropriate for those regions.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2019)

Quadrant Descriptions

Leaders

Leaders should drive market transformation. They have the highest combined scores for Ability to Execute and Completeness of Vision. They are doing well and are prepared for the future with a clear vision and a thorough appreciation of the broader context of digital business. They have strong channel partners, a presence in multiple regions, consistent financial performance, broad platform support and good customer support. In addition, they dominate in one or more technologies or vertical markets. Leaders are aware of the ecosystem in which their offerings need to fit. Leaders can:

- Demonstrate enterprise deployments.

- Offer integration with other business applications and content repositories.

- Support multiple vertical and horizontal contexts.

Challengers

Challengers are solid vendors that can perform well for many enterprises, but they may lack the vision to guide customers in future. A Challenger may have a strong WCM product but a product strategy that does not fully reflect market trends. It might, for instance, place insufficient emphasis on the increasing importance of the user's context, multichannel output and interoperability with adjacent technologies (such as those for CRM, DAM and multichannel campaign management).

Visionaries

Visionaries are forward-thinking and technically focused. Their products may, for example, incorporate ML to optimize design. Alternatively, Visionaries may generally set the market's direction through innovation and product development. To become Leaders, they must improve some of the core aspects of their offerings and business ecosystems to increase their Ability to Execute. They may also need to build up their financial strength, functional breadth, service and support, geographical coverage, and sales and distribution channels. Their evolution may hinge on the acceptance of a new technology or on the development of partnerships that complement their strengths.

Niche Players

Niche Players focus on a particular segment of the market, as defined by characteristics such as customer size, industry and project complexity. This narrowness of focus can be of benefit to organizations aligned with their niche, but may adversely affect their ability to innovate or expand their business. Niche Players often support only those applications that apply to the segments on which they focus.

Context

Study this Magic Quadrant to understand the WCM market and how Gartner assesses the main vendors and their packaged products. It will help you evaluate vendors based on a customized set of objective criteria. Don't simply select vendors from the Leaders quadrant. Consider how our evaluations match your particular needs. A Challenger, a Niche Player or a Visionary could be the best choice for your organization.

Market Overview

The WCM industry continues to evolve according to the imperatives of customer experience, digital transformation and digital business. After over 20 years of development, this market is now mature and starting to enter the new, much broader era of digital experience management, as warranted by buyers' demands. However, many organizations on the demand side still see WCM as the core technology driving their digital business.

Market trends:

- **WCM systems are evolving into DXPs:** Many vendors in the WCM market now offer WCM alongside a separate DXP product (see "Magic Quadrant for Digital Experience Platforms"). While WCM remains at the heart of the technology stacks that support customer experience initiatives, native WCM capabilities are expanding beyond their traditional boundaries. The "omniexperience" mandate and integrations with adjacent technologies are driving expansion into the area of DXPs.

- **The cloud extends beyond infrastructure:** Demand for continued innovation leads organizations to remove themselves from basic IaaS/hosted-service-related discussions about whether an WCM offering resides in a particular cloud. The driving force is now innovation, rather than customization. Customers are increasingly looking for more modern WCM technologies that are built on mesh app and service architecture MASA, microservices, serverless and containerized architectures.

- **Hybrid is the new headless:** Although "headless content management" has become something of a buzzword, global organizations are increasingly seeking systems that are not only purely headless but that can also provide head-on and head-optional capabilities from the same platform.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

"Critical Capabilities for Web Content Management"

"Magic Quadrant for Digital Experience Platforms"

"How to Shortlist WCM Vendors for Your Digital Business Strategy"

"Toolkit: How to Shortlist Web Content Management Vendors for Your Digital Business Strategy"

"Toolkit: RFP Template for a Web Content Management Software Solution"

"Applying AI to WCM and DXP — Key Use Cases"

Evidence

The analysis in this Magic Quadrant is based on information from a number of sources, including:

- Extensive data on functional capabilities, customer base demographics, financial status, pricing and other quantitative attributes gained via an RFI process that engaged with vendors in this market.

- Interactive briefings in which vendors provided Gartner with updates on their strategy, market positioning, recent key developments and product roadmaps.

- A web-based survey of reference customers identified by each vendor. This captured data on usage patterns, levels of satisfaction with major product functionality categories, various non-technology-related vendor attributes (such as pricing, product support and overall service delivery), and more. In total, 385 organizations across all major regions provided input about their experiences with the vendors and their tools.

- Feedback about tools and vendors captured during conversations with users of Gartner's client inquiry service.

- Market share and revenue growth estimates developed by Gartner's technology and service provider research unit.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.