The Forrester Wave™: Digital Experience Platforms, Q3 2019

The 10 Providers That Matter Most And How They Stack Up

by Mark Grannan and Ted Schadler
July 8, 2019

Why Read This Report

In our 33-criterion evaluation of digital experience (DX) platform providers, we identified the 10 most significant ones — Acquia, Adobe, BloomReach, Episerver, Liferay, OpenText, Oracle, Salesforce, SAP, and Sitecore — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital experience leaders make the right choice.

Key Takeaways

Salesforce, Oracle, Adobe, And SAP Lead The Pack

Forrester's research uncovered a market in which Salesforce, Oracle, Adobe, and SAP are Leaders; Episerver and Sitecore are Strong Performers; Acquia and BloomReach are Contenders; and OpenText and Liferay are Challengers.

Customer Data, APIs, And Event-Based Integration Are Key Differentiators

As channel-centric technology becomes outdated and less effective, providers that offer improved platform services on top of scalable infrastructure supported by a strong partner ecosystem will lead the pack. Vendors that can provide experience management, platform services, and infrastructure services position themselves to successfully deliver an end-to-end digital experience platform to their customers.

The Forrester Wave™: Digital Experience Platforms, Q3 2019

The 10 Providers That Matter Most And How They Stack Up

by Mark Grannan and Ted Schadler
with Allen Bonde, Sara Sjoblom, Emma Huff, and Peter Harrison
July 8, 2019

Table Of Contents

Related Research Documents

Share reports with colleagues.
Enhance your membership with Research Share.

The Rich Get Richer As Digital Experience Platform Vendors Layer Up

Forrester has long believed that despite vendors selling increasingly large chunks of digital experience platforms, enterprises don't buy everything from one vendor. Legacy investments, limited budgets, business disruption, and fear of vendor lock-in lead most organizations to avoid going all-in on a single vendor's DX platform. Yet, today, rationalization, customer data, and automation may be increasingly powerful motivators as senior digital architects shape more of the front-office experience architecture. Vendors are racing to capitalize on this opportunity.

Seeing the DX platform market through two lenses — extensibility and automation — helps DX leaders understand the two value propositions. Small, independent platforms that adhere to architectural strengths rely on partnerships and marketplaces to be relevant and aim for faster implementation times and land-and-expand strategies to win business. By contrast, large portfolio vendors that refactor for core experience services like identity, content, and behavioral profile aim for new features driven by AI and machine learning (ML) that are trained on this recently aggregated customer data. If these features prove their worth, reducing time and driving quality, independent vendors will have a hard time catching up to provide full platforms and must embrace their roles as "add-ons" instead.

Buyers should look for vendors that support an architectural approach to building a digital experience platform stack in three layers:

› **Experience management and delivery give practitioners contextual control.** These applications provide practitioners like marketers and merchandisers with controls to weave marketing, commerce, and touchpoint services together into a digital experience within a channel, or increasingly, across channels and over time. These practitioner applications should all be linked, or linkable, by common platform services — the next layer in the stack.

› **Platform services act as a force multiplier to accelerate operational agility.** Vendors must build platform services to support differing performance needs for back-end transactional integration versus front-end customer experience scale. This "experience middleware" is where vendors are increasingly differentiating their platforms. By creating common services for content, customer data, and transactions, overlaid with AI/ML, they can provide leverage to the experience management layer as well as give practitioners insight into journeys and experiences. This also provides a common foundation for event-based triggers and routing to guide a customer through an engagement.

› **Infrastructure services anchor the operations, security, and development.** Digital experience platform vendors are responding to the requirements of scale, security, and operational support with more and better infrastructure services, including cloud and hybrid cloud support. These services are often only exposed to platform administrators and back-end developers. However, for those teams, scalability and automation make or break the platform. In some cases, the hybrid cloud management tooling will be essential for your organization to gain a clear picture of the platform performance and operations.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our report "Now Tech: Digital Experience Platforms, Q3 2019."

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 1 Forrester Wave™: Digital Experience Platforms, Q3 2019

THE FORRESTER WAVE™
Digital Experience Platforms
Q3 2019
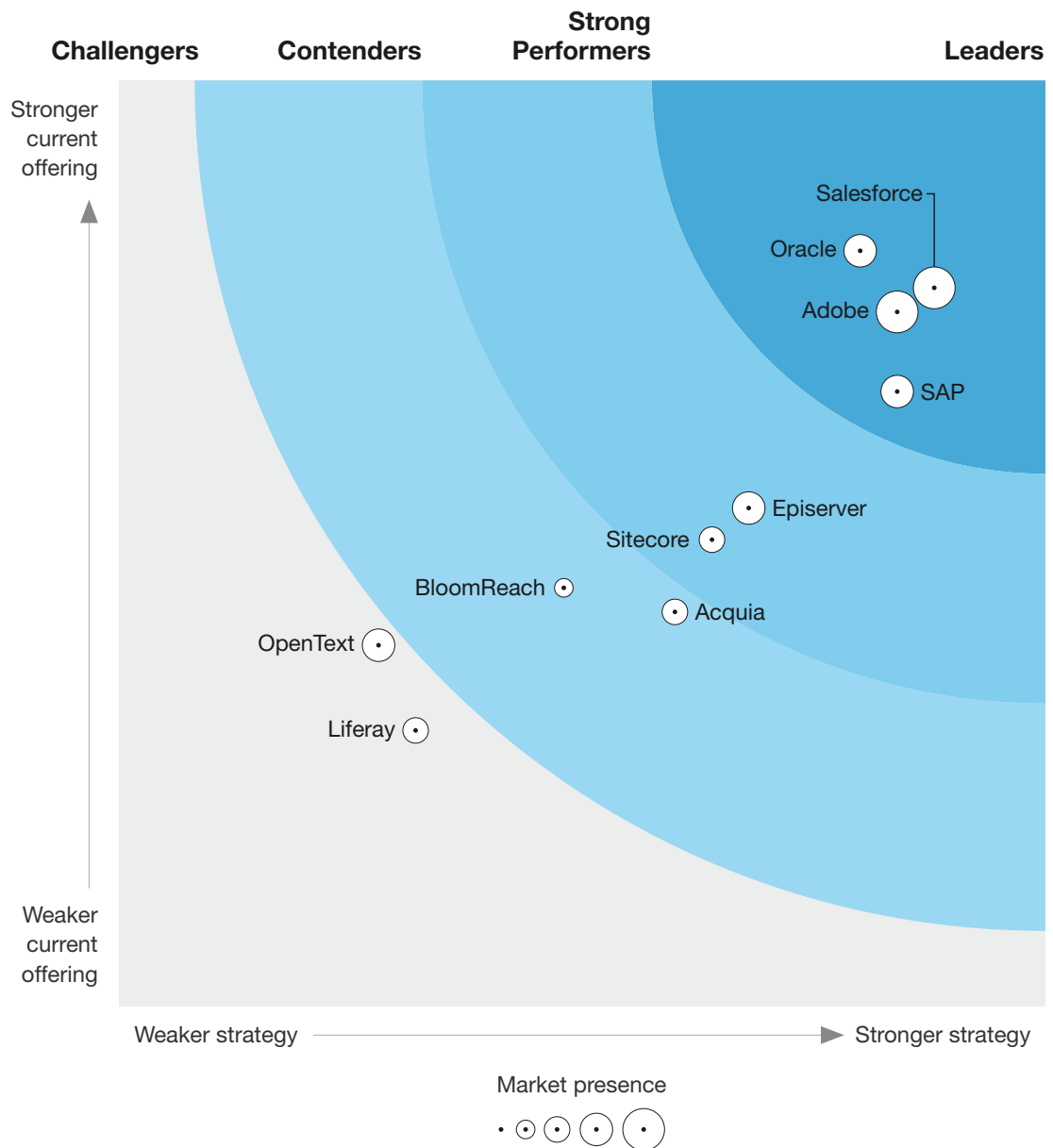
FIGURE 2 Forrester Wave™: Digital Experience Platforms Scorecard, Q3 2019

	Forrester's weighting	Acquia	Adobe	BloomReach	Episerver	Liferay	OpenText	Oracle	Salesforce	SAP	Sitecore
Current offering	50%	2.13	3.75	2.26	2.69	1.49	1.95	4.08	3.88	3.32	2.52
Experience management and delivery	40%	1.80	4.20	2.20	3.20	1.40	1.50	4.20	4.00	3.80	2.40
Platform services	30%	1.90	4.30	2.10	2.50	1.10	2.10	4.00	3.40	2.60	2.80
Infrastructure services	30%	2.80	2.60	2.50	2.20	2.00	2.40	4.00	4.20	3.40	2.40
Strategy	50%	3.00	4.20	2.40	3.40	1.60	1.40	4.00	4.40	4.20	3.20
Vision	20%	3.00	5.00	3.00	3.00	1.00	1.00	5.00	5.00	5.00	3.00
Execution road map	10%	3.00	5.00	1.00	5.00	1.00	3.00	3.00	3.00	3.00	3.00
Market approach	10%	3.00	3.00	1.00	1.00	1.00	3.00	3.00	5.00	3.00	1.00
Partner ecosystem	20%	3.00	5.00	1.00	3.00	1.00	1.00	3.00	5.00	5.00	5.00
Delivery model	10%	3.00	3.00	3.00	5.00	1.00	1.00	5.00	5.00	3.00	3.00
Commercial model	20%	3.00	3.00	5.00	3.00	3.00	1.00	5.00	3.00	5.00	3.00
Supporting products and services	10%	3.00	5.00	1.00	5.00	3.00	1.00	3.00	5.00	3.00	3.00
Market presence	0%	3.00	5.00	1.40	3.80	2.20	3.40	3.80	5.00	3.80	3.00
Customer count	80%	3.00	5.00	1.00	4.00	2.00	4.00	4.00	5.00	4.00	3.00
Average deal size	20%	3.00	5.00	3.00	3.00	3.00	1.00	3.00	5.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Offerings

Forrester included 10 vendors in this assessment: Acquia, Adobe, BloomReach, Episerver, Liferay, OpenText, Oracle, Salesforce, SAP, and Sitecore (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated
Acquia	Acquia Experience Platform
Adobe	Adobe Experience Cloud
BloomReach	BloomReach brX Platform
Episerver	Episerver Digital Experience Cloud
Liferay	Liferay Digital Experience Platform
OpenText	OpenText Experience Suite
Oracle	Oracle CX Cloud Suite
Salesforce	Salesforce Community Cloud Digital Experience Platform
SAP	SAP C/4HANA
Sitecore	Sitecore Experience Platform

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **Salesforce has expanded its portfolio to tackle commerce and B2B2C industries.** The vendor has long dominated the CRM market but has traditionally lacked important capabilities in content and commerce. Salesforce has plugged that commerce gap by acquiring Demandware for B2C and CloudCraze for B2B scenarios. It has also beefed up its enterprise integration chops by acquiring MuleSoft for API management since our last Forrester Wave on DX platforms.[1] The company has also seen a dramatic uptick in the adoption of Community Cloud to address more diverse use cases, including B2B2C situations. Salesforce draws on its industry clouds and developer cloud to host solutions for a large set of scenarios in enterprise and midmarket companies.

Compared with other vendors we evaluated, Salesforce is especially strong in B2C and B2B commerce, campaigns, and messaging as well as customer profile, developer tools, and API management. It is weaker in web experience management, content hub, and marketing and rich media content. Salesforce offers a strong product vision but is still rationalizing its pricing models from various acquired assets. We particularly like the vendor's commitment to enterprise integration, both through MuleSoft and via a maturing eventing architecture. Clients also like

Salesforce's capabilities for dealer portals and commerce. Salesforce is a good fit for companies looking to extend CRM out into the experience tier, with commerce capability now available in both B2C and B2B industries. Just be sure to consider whether it has hosting in your country where regulations might require it.

› **Oracle aims to be a cloud-first, one-stop shop with new data and content foundations.** Oracle's acquisitive strategy means it has products in almost every DX category, and the CX Cloud portfolio includes traditional CRM (sales and service), too. Oracle CX Cloud's primary transition has been rebuilding legacy applications in the cloud, including its commerce and content offerings. While Oracle CX Cloud consisted of siloed business units during our last evaluation, they have since realigned under new leadership; however, the platform team is still not a peer of other product organizations (e.g., marketing, commerce, or content).

Oracle has broad strength in commerce, marketing, AI/ML automation, and API management versus peers but underperforms in content marketing, practitioner tooling and support, and search. Clients specifically would like to see better process and workflow support across the applications, and they would welcome more vibrant developer and practitioner communities to grow their own talent pools. Oracle's recent pivot to shared common services, like eventing, customer data (CX Unity), and content (Content and Experience Cloud), is focused on where the functionality is missing, not necessarily where it overlaps. For example, behavioral targeting in Commerce Cloud bears no relation to the Marketing Cloud capabilities from its Maxymiser acquisition. Oracle is a good fit for organizations looking for a suite of cloud products in almost every category but that don't need outsized support from top-tier developer and practitioner programs.

› **Adobe continues to expand and integrate its portfolio to serve premium brands.** Adobe has long carried the premium lineup for marketers, particularly in B2C. It continues to acquire missing parts, recently purchasing Magento for commerce and Marketo for B2B marketing. As with other vendors growing through acquisition, Adobe has invested to pull the parts together, but that remains a work in progress in many customer accounts. Adobe has the most digital experience agency partners of any vendor we track, but it also competes with those partners for strategy, architecture, and hosting services. Adobe's recent enthusiasm for the Experience League training and support organization signals its focus on adoption and renewals.

Compared with other vendors we evaluated, Adobe stands out in experience management and platform services, including content, marketing, and analytics. It is weaker in infrastructure services, including API management and low-code development. We like Adobe's continued investment in customer data models as well as its new "Experience Platform," which focuses on enterprise-scale dynamic customer profiles and event-based integration and workflow. Clients like Adobe's capabilities for integration and AI, but they crave simpler pricing. Adobe is a good fit for B2C companies looking for strong marketing and commerce and for B2B companies looking to bring consumer-style strategy to B2B scenarios. But Adobe is too much machine for smaller firms or those that need more basic experience tooling.

› **SAP has unified its experience portfolio to tie the front and back offices together.** SAP's recently formed C/4HANA platform brings the firm's commerce, customer data, marketing, sales, and service clouds together under a single leader and organization. While the vendor views C/4HANA as a broader CRM suite, the self-service experience portion is built from a range of parts and is coming together as an enterprise suite — though based on its recent conference, the company risks confusing customers by emphasizing its Qualtrics survey business and "experience management" theme, rather than the larger SAP C/4HANA business.[2] SAP and its ecosystem partners have prioritized industries like manufacturing, utilities, and financial services, where SAP also has a robust enterprise resource planning presence, as well as retail and hospitality.

SAP is especially strong in B2C and B2B commerce, customer identity and access management, and API management versus its peers. It is weaker in customer process automation, developer tools, and marketing and rich media content. SAP's strategy resonates, especially when it articulates its "X plus O" vision, and the company continues to have a world-class partner network. Yet, SAP has work to do to rationalize pricing across its acquired assets and tell a unified cloud story. We like SAP's commitment to building industry data models as well as its Cloud Platform Extension Factory eventing middleware, based on the Kyma open source project. Clients like these expanding capabilities and the ability to run in the cloud, but they (as always) would like better integration among the products. SAP is a good fit for both existing clients looking to extend the experience tier as well as new customers with complex commerce and customer data needs.

Strong Performers

› **Episerver has expanded its cloud capability to better serve midmarket companies.** Episerver is all in on Microsoft Azure. The bulk of its new customers run on this globally expanding cloud, and the company works side by side with Microsoft engineers on the hosting and operations tooling to operate multisite scenarios. We like Episerver's focus on the building blocks for experience management, platform services, and an infrastructure built on Azure — as well as its surprisingly robust AI capability.

Overall, Episerver rates well in B2C commerce, search, and web experience management versus other vendors we evaluated. It is weaker in digital asset management and in infrastructure services, including API management and platform certifications. Episerver gets high marks on several strategy factors, including delivery model and execution road map. Yet, despite its momentum, it still trails Leaders in its partner ecosystem and market approach. Clients like Episerver's capabilities for loose coupling to the content management system and the ease of deployment and operations. They would welcome improvements in training and partner availability in-market. Episerver is a good fit for European companies, where the bulk of its partners operate, as well as midmarket companies in North America making a bet on Microsoft Azure.

› **Sitecore embraces content creation, focusing on end-to-end experience flows.** Sitecore has offerings in web content management systems (CMSes) with some marketing and customer data capabilities and a standalone, but connected, B2C eCommerce solution. At the end of

2018, Sitecore acquired Stylelabs for its software-as-a-service-based solution for rich media and marketing content creation and management. This addition pits the vendor more firmly in the creative end of the DX landscape and builds stronger inroads to marketers. However, it's early days on the journey to integrate Stylelabs, and we wouldn't be surprised to see additional acquisitions and/or partnerships as Sitecore solidifies its story for the midmarket and beyond.

Compared with other vendors we evaluated, Sitecore shines for its rich media and marketing content and web experience management, but it falls behind in customer data, analytics, marketing automation, eventing, role-based access, and platform operations. Sitecore's partner ecosystem is relatively strong given the size of its portfolio; however, during this evaluation, Sitecore acquired a small digital agency, Hedgehog, to increase support and enablement, which could cause conflicts with smaller partners. Clients told us that they like the ability to progress rapidly toward their personalization strategy, but they would also like improvements in the vendor's practitioner training and tooling. Sitecore is a good fit for companies that want strong web experience management with lighter-weight, but baked in, marketing and commerce tools — and increasingly want content connected from creation all the way through delivery.

Contenders

› **Acquia strengthens APIs and features for simpler web experiences.** Acquia is known for Drupal — hosted and managed on public cloud infrastructure — but it expanded its product portfolio by adding DAM and Journey solutions via OEM relationships in 2018. It has also revamped Cloud Site Factory to be more fluid with Acquia Cloud, including headless/decoupled deployments. Acquia Lift remains the home for most marketing, data, and analytics features, and adoption is growing within the Acquia client base. Acquia also acquired Mautic for marketing automation during this Forrester Wave process; we did not formally include that capability in the evaluation.

Given its history, it's not surprising that Acquia's strengths lie in its content hub, web experience management, development tooling, and platform operations. But despite recent moves, the company continues to lag in customer data, commerce, and AI/ML automation capabilities. Acquia's strategy is making progress, especially in pricing transparency, since our last evaluation. This strategic pivot still needs to overcome the fact that most Acquia buyers are trying to solve web problems, not higher-level digital customer journey issues. Overall, Acquia clients would welcome more maturity in marketing and developer automation tools so they can use them at enterprise scale. Acquia remains a good fit for web-centric digital experience management organizations, especially those with an affinity for open source or Drupal.

› **BloomReach's CMS and search stand out, but the firm is (still) unifying its platform.** BloomReach's products for web CMS and site search for eCommerce are converging around omnichannel scenarios for brands and manufacturers, and the vendor is expanding eCommerce partnerships to drive this. An open source heritage has helped fuel these relationships. Meanwhile,

the unification of two geographically and culturally disparate teams continues more than two years after the acquisition of Hippo. The BloomReach team anticipates hitting a significant milestone — a unified UI and set of permissions — later in 2019.

Compared with other vendors we evaluated, BloomReach excels in web experience management, search, and platform operations. While BloomReach's search has AI/ML capabilities baked in, and its CMS offering has strong APIs and developer tools, neither are universal across its platform as of this evaluation. BloomReach is largely missing marketing, customer data, and analytics capabilities. The company's vision is solid, if somewhat narrow, and its commercial model stands out due to recently streamlined utility pricing against page views. However, clients felt that the road map, market approach, and supporting programs have all fallen behind. Others said that the partner program is rapidly maturing under new leadership, but that it's not yet on par with competitors. BloomReach remains a solid solution for branded manufacturers looking to establish direct channels, and it will gain relevance for retailers and pure-play eCommerce as the platform unification efforts bear fruit.

Challengers

› **OpenText has rationalized its product set to remain focused on content scenarios.** OpenText has popular offerings in web content management, digital asset management, and customer communications management (which is not part of our experience research). It primarily focuses on content and formal communication use cases, with bridges to commerce and broader experience scenarios via its relationship with SAP, for example. However, OpenText has still made significant progress simplifying its content-centric product lineup and moving it to the cloud. But we weren't able to connect with a client that uses OpenText as a building block in a full digital experience.

Given its focus, OpenText gets top marks for marketing and rich media content, as well as content hub, versus other vendors we evaluated. Clients especially like OpenText's capabilities for archival assets and content sharing. But the vendor trails the pack in other core areas including B2C and B2B commerce, B2C and B2B campaigns and messaging, and developer tools and support. OpenText scores better in strategy factors, including execution road map and market approach, with its extensive partner-led engagements in complex content scenarios, but it has fewer partners and a more complex commercial model compared with Leaders. OpenText is a good fit for content-rich scenarios, particularly with complex digital asset management needs. But it is not a full digital experience platform for firms that need significant marketing or commerce support.

› **Liferay's new solutions broaden its appeal, but mostly for early-stage DX firms.** Liferay's heritage in portal server technology has transformed into a headless development and runtime platform that includes lightweight CMS and web experience management features. In 2018, it added a cloud-native offering as well as B2B commerce and customer analytics add-on solutions, although none of the customer references we spoke with had experience with these. Triblio, the B2B marketing solution that the company acquired in 2018, was not part of this evaluation because it continues to run as a standalone business with no direct integration efforts to unify the products.

Compared with other vendors we evaluated, Liferay is strongest in platform support, developer tools, and platform operations but trails the competition in marketing, customer data, analytics, and AI/ML automation. Liferay's strategy, relative to this field of competitors, is rather muted. Its subdued go-to-market approach is born from being privately owned with a strong sense of corporate social responsibility. While clients liked Liferay's extensibility, distributed geographic presence, and growing support programs (e.g., Liferay University), the vendor has yet to create a meaningful ecosystem. Liferay is and will continue to be a good fit for complex enterprises with an affinity for Java and open source but that need to rightsize their investment to fit their early-stage DX maturity.

Evaluation Overview

We evaluated vendors against 33 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include three categories of services: experience management to enable practitioners, platform capabilities to standardize assets for reuse, and infrastructure that drives scale performance and enables developers.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, execution road map, market approach, partner ecosystem, delivery model, commercial model, and supporting products and services.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customer count and average deal size.

Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: Acquia, Adobe, BloomReach, Episerver, Liferay, OpenText, Oracle, Salesforce, SAP, and Sitecore. Each of these vendors has:

› **An architectural approach to experience delivery.** With extensibility baked into the platform for standards-based integration, these vendors provide integration-ready APIs and middleware. This integration strategy increasingly provides event listening hooks with a modern event-driven architecture.

› **Software that enables practitioners to build, manage, and optimize digital experiences.** By providing a critical mass of capabilities comprising content, customer data, transactions, integration, infrastructure, analytics, and automation, these software solutions allow enterprise practitioners to actively manage "owned" digital channels (e.g., web and mobile), support customer messaging (e.g., email and PUSH), and support third-party experiences (e.g., retail marketplaces and social media).

› **Enterprise relevance and track record.** Customers and partners confirm that the vendor's product(s) acts as a core anchor tenant within the enterprise architecture, and there are reference customers with at least $500 million in revenue.

› **Mindshare among Forrester's enterprise customers.** The vendors we evaluated are frequently mentioned in Forrester client inquiries, shortlists, consulting projects, and case studies.

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

Learn more.

Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

Learn more.

Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

Learn more.

Forrester's research apps for iOS and Android.
Stay ahead of your competition no matter where you are.

Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by April 2019 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] See the Forrester report "Now Tech: API Management Solutions, Q4 2018."

[2] Source: Susan Galer, "SAP CEO Bill McDermott at SAPPHIRE NOW: Seize Our Destiny to Win in the Experience Economy," SAP, May 8, 2019 (https://news.sap.com/2019/05/keynote-ceo-bill-mcdermott-at-sapphire-now-destiny-experience-economy/).

FORRESTER®

CHALLENGE THINKING. LEAD CHANGE.

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

› Core research and tools
› Data and analytics
› Peer collaboration
› Analyst engagement
› Consulting
› Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals	**Technology Management Professionals**	**Technology Industry Professionals**
CMO	CIO	Analyst Relations
B2B Marketing	› Application Development & Delivery	
B2C Marketing	Enterprise Architecture	
Customer Experience	Infrastructure & Operations	
Customer Insights	Security & Risk	
eBusiness & Channel Strategy	Sourcing & Vendor Management	

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.

144413