Magic Quadrant for Digital Experience Platforms

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The digital experience platform market reflects the demand to manage digital experiences of customers, partners and employees. Use this Magic Quadrant to identify vendors that meet your needs across web, mobile and other digital channels.

Strategic Planning Assumption

By 2026, at least 70% of organizations will be mandated to acquire composable digital experience platform technology, as opposed to monolithic suites, compared to 50% in 2023.

Market Definition/Description

A digital experience platform (DXP) is an integrated set of technologies designed for the composition, management, delivery and optimization of personalized digital experiences across multiple channels in the customer journey.

A DXP binds capabilities from multiple applications to allow the creation, orchestration and presentation of seamless experiences. It also forms part of a digital business ecosystem via API-based integrations with adjacent technologies. DXPs are applicable to business-to-consumer (B2C), business-to-business (B2B) and business-to-employee (B2E) use cases.

Must-Have Capabilities

The must-have capabilities for the DXP market include:

- Content management capabilities for managing various content types, including (but not limited to) textual content, graphics and other rich media, web content, mobile app content, chatbot content, and voice content.
- Support for multiexperience presentation, orchestration, delivery and assembly of digital experiences via hybrid and/or headless capabilities.
- A composable architecture for modular and API-first approaches, with a set (or sets) of discrete, task-oriented and independently deployable packaged business capabilities (PBCs).
- Cloud capabilities — each DXP has to be available for cloud deployment as PaaS (with or without managed services) and/or SaaS for deployment versatility, scalability and elasticity,

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

Standard Capabilities

The standard capabilities for the DXP market, provided either natively or through an integration/OEM, include:

- Account services for customer profile management, registration, login and password management capabilities in an authenticated, logged-in experience.
- Personalization and context awareness for relevant and individualized experiences for the customer, based on past behavior, segmentation, AI technologies and external data sources.
- Analytics and optimization for assessing and continuously improving the performance, effectiveness and utility of digital experiences.
- Customer journey mapping for platformwide, programmatic support for customer journey mapping, customer journey orchestration and customer journey analytics throughout the customer life cycle.
- Customer data management for understanding the customers, managing disparate customer data silos in a 360-degree view, and creating customer segments based on attributes from multiple data sources.
- Search, navigation and insight to locate and discover information, applications and services.
- Collaboration and knowledge sharing for users to work together in groups or communities, to achieve common business goals through conversations or information exchange.
- Security and access control for roles and permissions, and increasingly challenging security and regulatory compliance requirements.
- Applied artificial intelligence for use of machine learning, natural language processing, natural language generation, generative AI and other AI technologies to improve engagement.

Magic Quadrant

Figure 1: Magic Quadrant for Digital Experience Platforms

Source: Gartner (February 2024)

Vendor Strengths and Cautions

Acquia

Acquia is a Leader in this Magic Quadrant. Its Acquia Open DXP consists of Cloud Platform, CMS, Site Factory, CDP, DAM and Campaign Studio. Acquia is the primary commercial company behind the Drupal open-source web content management system. Acquia Open DXP offers broad capabilities, including content management, personalization, analytics and customer data management. It is available as a platform as a service (PaaS) offering, with some components available as SaaS. Acquia is headquartered in Boston, Massachusetts, U.S., with a presence in Europe, Latin America and the Asia/Pacific region. Its solution is often deployed in the government, media and services, education, financial services verticals. While Acquia most often supports B2C and B2B use cases, some organizations also use it for B2E use cases.

Strengths

- Acquia provides extensive customer journey mapping, personalization and segmentation capabilities augmented with AI in a rich and intuitive interface. This makes it a compelling option for nontechnical business users.

- Acquia is supported by a large and vibrant open-source Drupal community. This allows for additional product innovation and acts as a bridge between open-source and commercialized versions of the Drupal CMS.

- Acquia Exchange provides a strong offering as a marketplace for prebuilt integrations, connectors and modules across the entire product portfolio. This aids Acquia's customers, community and partners in decreasing complexity and increasing time to market.

Cautions

- Acquia's open-source ties continue to contribute to the market confusion between open-source Drupal and commercial Drupal Cloud as part of the vendor's DXP, and where the dependencies lie on open-source codebase, modules and security.

- Acquia's partner channel for implementation agencies and systems integrators is less developed than some of the other vendors in this research. This may limit the availability of qualified talent for customers implementing or optimizing their Acquia technology investment.

- Based on Gartner client inquiry, Acquia's presence on shortlists has been declining. This may signal changes in its DXP go-to-market with accelerated cross-sell and upsell into the vendor's larger product portfolio that includes multichannel marketing, DAM and CDP.

Adobe

Adobe is a Leader in this Magic Quadrant. Its DXP is Adobe Experience Cloud, which includes Adobe Experience Manager (AEM), Adobe Target, Adobe Analytics and Real-Time CDP, among others. It is available both as a managed service PaaS and SaaS. Adobe is headquartered in San Jose, California, U.S., and has a presence worldwide. It has customers in a variety of industries and of varying sizes. Adobe Experience Cloud's primary use case is B2C, but some organizations also use it for certain B2B purposes, and occasionally for B2E.

Strengths

- Adobe's DXP technology is often shortlisted and adopted. Many buyers choose it as a proven and mature solution.

- Adobe is known for deep, broad and innovative product features for external-facing digital experiences. Organizations with strong digital marketing strategies find this appealing.

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

Cautions

- Adobe's offering is often more expensive than those of other vendors in this research. Prospects should budget accordingly for at least a three-year term and plan for a higher total cost of ownership (TCO).

- The vendor has a complex suite of digital experience management tools requiring considerable technical resources to deliver, with a steep learning curve, specialized skill set and training, and longer implementation timelines.
- Adobe's pace of innovation sometimes comes at the expense of integration and alignment across its product portfolio, which creates complexities for its customers.

Bloomreach

Bloomreach is a Visionary in this Magic Quadrant. Its DXP is Bloomreach Commerce Experience Cloud, comprising 10 modules within the three "pillars" of Content, Discovery and Engagement. It is available as a fully SaaS solution. Bloomreach is headquartered in Mountain View, California, U.S., with offices across Europe, the Middle East and the Asia/Pacific region, and has some partner presence in Latin America. Bloomreach traditionally targets digital commerce experiences, but it has recently widened its reach to transportation, healthcare and other verticals across B2C and B2B.

Strengths

- Bloomreach offers a SaaS-based, modular solution that is consumable in parts, thus aligning to composability. Customers and prospects also appreciate its pricing and packaging strategy, which is also modular, with a usage component for API utilization.
- Bloomreach has shown strong growth in the face of economic headwinds, expanding within EMEA and across new verticals outside of traditional digital commerce. This allows prospects beyond commerce-driven use cases to consider Bloomreach in their DXP selection processes.
- Privacy and compliance are core pillars of the vendor's strategy, underpinning its use in commerce and regulated industry verticals. Prospects looking for a vendor with a strong end-user data privacy and protection strategy should include Bloomreach in their shortlists.

Cautions

- Bloomreach chooses to focus too strongly on commerce-related use cases, as reflected in its DXP product name. Prospects outside of this use case do not often consider the vendor in their DXP selections due to a lack of execution and product strategy when it comes to nontransactional use cases.
- Most customers use only one of the three Bloomreach pillars, as opposed to the broader DXP; as such, capability integrations and gaps may not be fully tested and understood.
- The vendor's search product — Bloomreach Discovery — is mature in its space and sometimes seen as the incumbent in Gartner client inquiry. Prospects with sophisticated search requirements may want to evaluate it against other search and product discovery vendors.

CoreMedia

CoreMedia is a Niche Player in this Magic Quadrant. Its DXP CoreMedia Content Cloud's capabilities include content management, integration and interoperability. Its August 2023 acquisitions of vendors BySide and Smarkio support contact center use cases and enhance personalization, journey mapping, chatbot and live chat capability, and multichannel support. CoreMedia Content Cloud is available as a vendor-managed PaaS or as self-managed, either on-premises or in a public cloud. CoreMedia is headquartered in Hamburg, Germany, with a presence in EMEA, North America and the Asia/Pacific region. CoreMedia is used in a wide range of verticals, including retail, telecommunications, manufacturing, financial services, healthcare, and media and entertainment. Its clients tend to use its DXP primarily for B2C, B2B and B2B2C use cases, with a particular focus on supporting digital commerce experiences.

Strengths

- CoreMedia's BySide and Smarkio acquisitions make it the only DXP that integrates a cloud contact center to blend sales, marketing and customer-service-driven digital experiences with human interaction. It may be a good fit for organizations aiming for a total experience approach.

- CoreMedia uses prefabricated solutions to bridge the gap between composability and the monolithic single-vendor DXP with fragmented digital experience composition (DXC). The trajectory should appeal to organizations struggling with the trade-offs between monolithic DXPs and complex multivendor assemble-and-integrate strategies.

- CoreMedia provides packaged integrations with a widening range of strategic and emerging technology providers, including Salesforce, SAP, Algolia and Dynamic Yield by Mastercard. Its customers are able to leverage CoreMedia Marketplace to select and deploy these packaged integrations.

Cautions

- CoreMedia's acquisitions could drive it further into a marketing, commerce, contact center niche, rendering it less appealing to the broader DXP market. Prospective customers may find added capabilities inapplicable to their use cases and aspirations.

- In Gartner client inquiries, some customers report that CoreMedia is difficult to set up and use. The UI is functionally rich, but difficult to master, especially for occasional content managers and contributors. Prospective customers should request a hands-on demonstration or proof of concept.

- Global market awareness of CoreMedia is low compared to other vendors in this research, which can have a negative impact on the support ecosystem and ability to respond to evolving market demands.

Crownpeak

Crownpeak is a Niche Player in this Magic Quadrant. Its DXP is the Crownpeak Digital Experience Platform, and its capabilities include content management, presentation and orchestration, as well as adjacent capabilities for consent management, compliance, governance and security. It is available as SaaS, with the acquired Attraqt technology integrated into its cloud as Product Discovery, enabled as part of the DXP solution. Crownpeak is headquartered in Denver, Colorado, U.S., and has a presence in Europe. Crownpeak is often used by organizations in retail, manufacturing, banking and securities, insurance, and healthcare providers. It is most often deployed for B2B and B2C use cases.

Strengths

- Crownpeak provides a unique option to combine GenAI content and image generation with its Digital Quality Management solution. This could help organizations struggling with concerns about using machine-generated content.

- The vendor is a good choice for midsize enterprises. Its customers appreciate the effort with rightsized solutions, clear pricing and SaaS infrastructure.

- Crownpeak has been expanding its product portfolio with acquisitions. This gives customers access to a more feature-rich stack.

Cautions

- Crownpeak has a limited geographic presence outside of Europe and North America. Prospective customers should closely examine the partner network in other regions.

- Crownpeak lags behind other vendors in this research in terms of product portfolio expansion in customer data management, customer journey mapping and analytics. Prospects looking for these specific capabilities should either consider other vendors or plan for integrations outside of Crownpeak.

- Crownpeak appears to be focused on commerce use cases, with headless SaaS CMS delivering content to front-end applications rather than powering the experience directly. This may limit delivery and orchestration options for broader or distinct use cases.

HCLSoftware

HCLSoftware is a Challenger in this Magic Quadrant. Its DXP is HCL Digital Experience (DX), part of a wider HCL Customer Experience (CX) product portfolio. Core capabilities include content management, DAM, CDP and low-code application development. HCL DX clients remain largely on-premises, although some newer deployments are moving to a PaaS offering. HCLSoftware is headquartered in Santa Clara, California, U.S., and has global operations. Its DXP is deployed across government, life sciences, insurance, financial services and other verticals. It is used mainly in large and very large enterprises for B2B, B2C and B2E use cases.

Strengths

- HCLSoftware’s DXP focuses on industry expertise, security and privacy. Customers often choose HCL DX for use cases with requirements for integration, extensibility and connectivity in fairly complex scenarios.

- The vendor has a strong global presence, and is able to serve organizations located in regions underserved by some other vendors in this research. Its customers may benefit from the recently introduced fractal/regional structure, which allows for support from technology partners geographically closest to the customer.

- HCLSoftware's new user session licensing represents progress from its once complicated on-premises-oriented approach to pricing and packaging. Customers and prospects may benefit from more predictable and simplified consumption-based pricing.

Cautions

- Getting to a full DXP remains a complicated proposition for some customers, as some required capabilities are available in adjacent products such as Unica and Connections. This approach can create technical bloat when organizations need certain capabilities without the full feature sets or costs of those products.

- While HCL DX manages some sophisticated, challenging and unique digital experience initiatives, in Gartner client inquiries, some customers report longer-than-expected time to implement and a poor user experience for both developers and business users.

- Much of the vendor's development effort appears devoted to transitioning its products and customers from outmoded architectures and models derived from the IBM WebSphere legacy, as opposed to proactive, organic innovation.

Kentico

Kentico is a Niche Player in this Magic Quadrant. It offers two DXP options. Kentico Xperience 13, launched in 2020, is available as PaaS frequently managed by partners or in a private cloud. The new Xperience by Kentico, launched in July 2022 as the successor to Kentico Xperience 13, is available as self-managed SaaS. Kentico's offerings target digital marketers with a broad range of capabilities, including content management, marketing automation and digital commerce. Kentico is headquartered in Brno, Czech Republic, and has a strong presence in North America. Its DXP is often deployed by organizations in the financial services, healthcare and manufacturing verticals. It is typically used by midsize organizations across various B2B, B2C and B2E use cases.

Strengths

- Kentico Xperience 13 provides simple, low-cost pricing clarity. Customers and prospects appreciate predictable costs and the ability to be prepared to source hosting separately.

- The vendor is highly regarded for ease of use with a cohesive product that has been organically developed. Customers in midsize organizations value its all-in-one operational simplicity.

- Kentico's focus on partners means it is well-represented around the world with good partner presence in most regions, relative to the organization's size. This allows for plenty of choice of agencies and systems integrators for implementation of the software.

Cautions

- Kentico's primary go-to-market is Xperience by Kentico, which still lacks feature parity with Kentico Xperience 13 and is absorbing a lot of development effort by the company. Prospective clients should carefully consider which solution is most aligned with their business objectives.

- Kentico Xperience 13 is architecturally outmoded; with increased client interest in composability, this all-in-one solution may not align to a majority of prospects.

- Kentico is relatively small compared to many other DXP providers evaluated in this Magic Quadrant. It has invested in the partner channel to improve scale, which is slowly improving growth; however, with a lower license cost, the effort required to grow is greater.

Liferay

Liferay is a Niche Player in this Magic Quadrant. Liferay DXP is offered via SaaS, PaaS and on-premises/customer cloud deployments. All offerings include capabilities for experience management, content management, personalization and analytics. Liferay is headquartered in Diamond Bar, California, U.S., with a presence in Latin America, EMEA and the Asia/Pacific region. Its DXP is often deployed by organizations in the manufacturing, telecommunications, government and financial services verticals, and in B2B, B2C and B2E use cases.

Strengths

- Liferay DXP exhibits differentiated expertise in enabling portal experiences. It's a good fit for organizations looking to deploy authenticated experiences involving aggregation and orchestration of content, services and applications from disparate internal and external sources.

- While reducing technical complexity for its key IT audience, Liferay has made strides in addressing nontechnical stakeholders. Business users may benefit from improved editorial usability, as well as being able to utilize AI and analytics in an integrated and orchestrated fashion, as opposed to having to do native development.

- Liferay's strong partnership approach has increased its geographical and vertical industry presence and expertise. This allows more choice for organizations seeking architecture, design and implementation services for Liferay.

Cautions

- Liferay has been relatively slow in advancing its cloud strategy and increasing adoption of its SaaS version. While SaaS has become an option, a large majority of Liferay customers still run DXP primarily on-premises and will take some time to transition.

- Composability is a work in progress, with the core DXP remaining monolithic. Liferay's all-in-one pricing model also runs counter to the concept of composability. Customers must pay for the whole monolith even if they're planning to use Liferay in conjunction with overlapping functionality from other vendors/services.

- Liferay's go-to-market strategy has historically focused on IT buyers. This may result in business leaders, who have become increasingly influential in DXP decisions, not considering Liferay on their shortlists.

Magnolia

Magnolia is a Visionary in this Magic Quadrant. Its DXP is Magnolia DX Core, and its capabilities include content management, personalization and search. It is available on-premises or as a PaaS offering in a public or private cloud with multiple options for cloud platform. A SaaS option was released in an early access program in 2023. Magnolia is headquartered in Basel, Switzerland, and has some presence across North America and the Asia/Pacific region. Magnolia is deployed by midsize and large organizations in a broad range of verticals, with a focus on banking, travel and hospitality, and manufacturing. It is most often used for B2C and B2B use cases.

Strengths

- Magnolia DX Core is highly regarded by its clients for customer satisfaction. They appreciate the vendor's commitment to high-touch customer relationships and customer support.

- The vendor embraces composability by integrating adjacent technologies through no-code connector packs for multiple capabilities and low-code microframeworks for others. Prospects and customers find the integration of these third-party capabilities natively within the Magnolia DX Core UI compelling.

- Magnolia's integration of and vision for GenAI differentiates it from the other vendors in this research, as shown in how its composable architecture allows the flexibility to respond to technology shifts.

Cautions

- Magnolia's brand awareness remains low outside of geographies with an established footprint, such as Europe. Its private ownership leads it to make lower investments in sales and marketing strategies. This approach leaves prospects hesitant to evaluate Magnolia in their DXP selections.

- The vendor has resisted the general trend of providing native customer data management capabilities in the platform; this is deliberately considered as external, with personalization rules and segments that integrate into third-party CDPs. Prospective clients with customer data requirements will need an additional solution.

- Magnolia DX Core is less well-suited to smaller organizations or those without the technical resources to make the most out of the platform and its integration capabilities.

OpenText

OpenText is a Challenger in this Magic Quadrant. Its DXP is OpenText Experience Cloud, and its capabilities include content management, analytics, personalization, optimization and DAM. It is available on-premises or can be hosted on a public cloud through Microsoft Azure, Amazon Web

Services or Google Cloud Platform; on a private cloud through OpenText Private Cloud Services; or as a fully managed service. OpenText is headquartered in Waterloo, Ontario, Canada, and has a global presence. OpenText is used in a variety of verticals, including manufacturing, government, retail, financial services and insurance. It is most often deployed for B2C use cases, but is also applicable to some B2B use cases.

Strengths

- OpenText is strong in governance, security, account management and auditability in authenticated experiences. This makes it a good choice for buyers in highly regulated industries.

- OpenText's technology is extensible and customizable, and supported by APIs for integration, documentation, partner channel and developer community. This makes it a good fit for more complex digital experience use cases.

- OpenText provides the capabilities to support a broader information management strategy beyond the scope of the DXP, including customer communications management, content services and content collaboration. This may be beneficial to organizations looking to create a single vendor relationship.

Cautions

- Based on Gartner client inquiry, DXP buyers don't often consider OpenText Experience Cloud on shortlists unless they have already made substantial investments in its other information management products, as it is perceived as legacy and outdated.

- While OpenText has multiple cloud-based options for its DXP, it primarily targets PaaS, managed services and on-premises scenarios, with little progress toward modern cloud-native SaaS infrastructures.

- OpenText's lightweight CDP continues to offer a minimal set of capabilities. Customers with deeper requirements for customer data management should either consider other providers or investigate OpenText's integration with Google Cloud Platform and Google Marketing Platform.

Optimizely

Optimizely is a Leader in this Magic Quadrant. Its DXP is called Optimizely One and includes content management, personalization, customer data management and analytics capabilities. It is available on a subscription basis as a hybrid cloud solution, employing some SaaS components with management UIs, orchestrated around a single-tenant PaaS. Optimizely is headquartered in New York, New York, U.S., with a presence across EMEA and in parts of the Asia/Pacific region. Its DXP is most often used at midsize to large enterprises in retail, manufacturing and distribution, high tech, healthcare, commercial services, and financial services. It is most often used for B2C and B2B use cases.

Strengths

- The new addition of Optimizely Graph provides a GraphQL API unifying data across multiple Optimizely capabilities. It allows for more robust performance in AI-powered semantic search and support for external data sources, cached at the edge.

- Optimizely's pricing and packaging is simple, scalable, modular and transparent compared to many other vendors in this research. This gives prospects a lower barrier to entry and a crawl-walk-run approach as they digitally mature.

- Optimizely has integrated its acquisitions well, but most notable is its approach to taking elements of the acquired technologies and infusing them into other areas of the DXP, without requiring clients' full adoption of the original acquisition.

Cautions

- With Optimizely announcing its roadmap to a SaaS version of its remaining PaaS CMS offering, this transition may provide a period of uncertainty for prospects and clients.

- Optimizely's DXP has a complex landscape of products, including content management and content marketing, forms, and experimentation and optimization. This makes the learning curve steep and customers need to plan for rolled-out adoption.

- Optimizely continues to overfocus on content marketing and optimization and experimentation capabilities, thus diluting its overall DXP product strategy. Prospects and customers with a more holistic view on DXP should carefully examine the vendor's roadmap and product strategy to ensure alignment.

Progress

Progress is a Niche Player in this Magic Quadrant. Its DXP is called Progress DX and consists of Sitefinity for content management; Sitefinity Insight for CDP; Telerik and Kendo UI for app UI/user experience development; and NativeChat for conversational interfaces, among other capabilities.

The offering is available on-premises, as self-hosted, or as a fully managed PaaS or as SaaS. Progress is headquartered in Burlington, Massachusetts, U.S., and has a significant global presence, both through its own efforts and via partners. Progress DX is typically aimed at midsize organizations and is most frequently deployed for B2C use cases.

Strengths

- Progress offers native AI-assisted conversational interface capabilities that support both transactional and informational conversations in more than 60 languages. This is a differentiating capability that can benefit customers due to the breadth of features as well as prebuilt integrations with other products within the Progress DX portfolio, such as Sitefinity Insight.

- The vendor has made progress toward authenticated portal-like experiences via expanded capabilities and native integration with its UI components products. B2B and B2C organizations with strong emphasis on logged-in experiences or B2C organizations striving to offer interactive experiences might benefit from this.

- In Gartner client inquiries, customers report that the product's interface is intuitive and easy to use for nontechnical users, even for relatively complex tasks such as form creation and content targeting.

Cautions

- The vendor's cloud strategy can be confusing to both existing customers and new prospects due to several hosting options, from self-hosted to PaaS to SaaS. Many of the vendors in this research are making faster progress toward centralizing on modernized, truly cloud-native and multitenant SaaS infrastructure that provides benefits such as consumption-based pricing and no need to manually run upgrades.

- Progress has low brand awareness in the DXP market. Many prospects do not consider it in their DXP selections and shortlists, even when there is a good fit.

- With continued investment in UI components and DevOps tooling, Progress continues to be developer-centric, which may deter business users that are looking for less dependency on IT and more marketing tooling.

Sitecore

Sitecore is a Visionary in this Magic Quadrant. Its DXP suite comprises 11 products bundled into Content Cloud, Engagement Cloud and Commerce Cloud. Only the former two are included in this research. Sitecore continues to go to market with its legacy Experience Platform (XP), an all-in-one DXP, available on-premises or as a PaaS in Sitecore Managed Cloud. Sitecore Content Cloud comprises Search, XM Cloud (SaaS CMS), Content Hub Operations (CMP), Content Hub (DAM) and Content Hub ONE (a lightweight CMS). Sitecore Engagement Cloud comprises Sitecore CDP, Personalize, Connect (an integration marketplace for third-party systems) and Sitecore Send (for multichannel marketing). Sitecore is headquartered in San Francisco, California, U.S., and has a presence in EMEA and the Asia/Pacific region. Sitecore's DXP is used across many verticals — most often financial services, manufacturing and automotive. Sitecore is most frequently deployed in B2C and, increasingly, B2B use cases.

Strengths

- Sitecore has developed and productized a broad application marketplace that has over 1,000 integrations to external applications, with visual, no-code integration tools. This provides the benefits of accelerated, simplified and higher-quality integrations into the new SaaS-based DXP product suite.

- Sitecore's newer products (XM Cloud, Discover and Personalize) have become fully cloud-native SaaS with a broad and strong modular vision. This allows both existing customers and new prospects to consume benefits such as no need to run manual upgrades, and greater stability and scalability.

- Sitecore made strides in its product vision and made investments in its XM Cloud product by adding new capabilities, including an integrated form builder and a new decoupled experience studio. Organizations looking for a more bundled solution should explore the most recent release of XM Cloud Plus, which binds together CMS, personalization, search and analytics.

Cautions

- As reported by Bloomberg and others, Sitecore's owner EQT is considering options including a potential sale of this privately owned vendor. Sitecore's clients and prospects should seek clarification about the investment strategy and future product roadmap.

- Most of Sitecore's customers are on-premises, in managed cloud or self-hosting. In Gartner client inquiries, many express reservations about adopting the new XM Cloud SaaS offering, citing higher costs and significant effort required for migrating existing implementations. This often spurs discussions about replatforming and concerns about the level of vendor support during SaaS migration.

- Sitecore has been rationalizing its postacquisition product portfolio, initially released in 2022, but confusion around the overlapping product suite remains. For prospects, this means navigating a complicated cost-benefit and feature/function analysis of multiple business user UIs and products that identify as a CMS. Clients may find it difficult to know what product serves which use case.

Squiz

Squiz is a Niche Player in this Magic Quadrant. Its DXP platform is Squiz DXP, which includes capabilities for content management, search, personalization, customer data management and integration. It is available in a SaaS or on-premises deployment model. Squiz is headquartered in Sydney, Australia, and has a small presence in North America and EMEA. Squiz DXP is most often deployed by midsize organizations in the government, utilities and higher education verticals. It is used for B2C, B2E and B2B use cases.

Strengths

- Squiz DXP has improved composability and deployability through architectural advancements along with the Squiz Marketplace, a repository for content and integration components, complex miniapps, and design templates shared among customers.

- User experience has been positive. In Gartner client inquiries, many customers describe the product as easy to deploy and use when it matches their industry and use case.

- Unlike the greater mass of DXP providers that focus only on B2B and B2C use cases, Squiz provides prebuilt collaboration and knowledge sharing capabilities suitable for intranets and employee portals.

Cautions

- While it has satisfied many of its customers with its simplicity, Squiz has lagged behind other DXP providers in innovation across personalization, customer journey management, optimization and AI, along with, lately, generative AI.

- Squiz's customer base remains concentrated in verticals including higher education, government and utilities. Prospective customers in other areas must ensure adequate experience and support in their industries.

- Squiz's market presence and growth is comparatively lower than many other vendors in this research. This often precludes it from being viewed as a candidate in DXP selections outside of the Asia/Pacific region or in use cases that must show vendor investment in leading edge capabilities.

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

- No vendors were added to this Magic Quadrant.

Dropped

- No vendors were dropped from this Magic Quadrant.

Inclusion and Exclusion Criteria

Business Criteria:

- **Revenue:** Each vendor's DXP offering must have generated revenue of at least $17 million, with at least 5% year-over-year revenue growth in the 12 months leading up to June 2023. Revenue includes perpetual licenses and/or cloud subscription and support/maintenance revenue. Professional services, training, onboarding and infrastructure/hosting revenue were excluded. The vendor must have acquired at least 10 net new customers in the 12 months leading up to June 2023.

- **Market presence:** Each vendor had to have been marketing and selling its DXP product since at least June 2020.

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

- **Partner ecosystem:** Each vendor had to demonstrate the ability to deliver implementation support for customers via a certified partner ecosystem containing at least 10 implementation agencies and systems integrators.

- **Vertical market coverage:** At least 20% of vendor revenue had to derive from at least three of the following verticals: banking and securities, communications, media and services, education, government, healthcare provision, insurance, manufacturing and natural resources, retail, transportation, utilities, and wholesale trade. The vendor's DXP marketing had to target customers in at least three of these sectors.

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

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

Product Criteria

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

- **Use-case support:** Each DXP had to be able to support, as a cohesive and integrated product, at least two of the three use cases — namely B2C, B2B and B2E.

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

Natively:

- Content management capabilities for managing various content types, including (but not limited to) textual content, graphics and other rich media, web content, mobile app content, chatbot content, and voice content

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

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

- Cloud capabilities; each DXP had to be available for cloud deployment as PaaS (with or without managed services) and/or SaaS for deployment versatility, scalability and elasticity, cost-efficiency, improved time to market, and rapid innovation associated with cloud computing

Either natively or via integrations (including with OEMs):

- Account service capabilities, including registration, login and password management with authentication and access control
- Customer data management capabilities
- Customer journey mapping capabilities
- Personalization and context awareness capabilities
- Analytics and optimization capabilities
- Practical applied AI capabilities
- Navigation and search capabilities
- Collaboration and knowledge sharing capabilities
- Security and access controls capabilities

Evaluation Criteria

Ability to Execute

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

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

Overall Viability: This criterion includes an assessment of a vendor's financial health, overall success and product vision, together with the likelihood that it will continue to invest in its product. The assessment concerns both a vendor's overall financial health and the financial and practical success of the relevant business unit. During the assessment, the organization's cash and equity position, growth in the market, management, and financial strategy are evaluated.

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

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

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

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

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

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria	***Weighting***
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High

Evaluation Criteria	Weighting
Marketing Execution	High
Customer Experience	High
Operations	Medium

Source: Gartner (February 2024)

Completeness of Vision

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

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

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

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

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

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

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

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

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

Table 2: Completeness of Vision Evaluation Criteria

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

Evaluation Criteria	***Weighting***
Innovation	High
Geographic Strategy	Medium

Source: Gartner (February 2024)

Quadrant Descriptions

Leaders

Leaders have ample ability to support a variety of DXP use cases and consistently meet customers' needs over substantial periods. Leaders have delivered significant product innovation in pursuit of DXP requirements, and have been successful in selling to new customers across industries.

Challengers

Challengers demonstrate significant Ability to Execute, with strong businesses and customer bases, as well as products that suit current demands. However, they lack the vision of Leaders and Visionaries, and may therefore struggle to fully satisfy future demands from a technology or business perspective.

Visionaries

Visionaries are forward-thinking vendors that demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. However, they are lacking in terms of some aspects of their offerings, service and support, and/or business and partner ecosystems, which impairs their Ability to Execute.

Niche Players

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

Context

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

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

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

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

Market Overview

When organizations need to deliver highly contextualized digital experiences — beyond simple websites and mobile-friendly webpages — they require a DXP for breadth of functionality and the ability to cover an increasing variety of modalities and channels across customer journeys. DXPs are often deployed at the center of content operations ecosystems.

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

- **GenAI ticks off the RFP checkbox:** Despite the hype around generative AI, many DXP buyers are struggling with understanding the technology, its benefits and what value they can realize from it. Most, if not all, DXP vendors have implemented an AI button in their solutions, but the use cases and their practical applications to realize true value vary widely (see **How to Realize Value From AI in Key WCM and DXP Use Cases**). At the same time, most buyers do pursue AI requirements and questions in their RFPs as a way to evaluate the shortlisted DXP vendors' roadmap and innovation.
- **Composability drives demand for granular pricing and packaging:** As the paradigms of composable business, composable thinking and composable technologies mature in the DXP market, there has been an increasing demand for more granular, consumption-based pricing and packaging that is not confined to strict tiers. Composability may become an existential threat to traditional DXP vendors. However, composability remains nascent as most DXP vendors are still in the early stages of their composability journeys, and there's still not enough advancement in regard to established marketplaces/catalogs of PBCs and associated pricing and packaging.
- **Headless CMS takes the forefront in "buy, compose and build":** Traditional DXP vendors are making steady but slow progress toward composability. Pure-play headless CMS vendors have emerged as steppingstones in composable DXP product selections. They address circumstances where the focus is not on buying a suite from one vendor, but on composing one's "own" DXP vision by following the buy, compose and build approach (as opposed to the traditional build versus buy). Thus, solutions are formed out of multiple best-of-breed curated components that usually constitute a typical DXP, with digital experience composition (DXC) providing the front-end integration of these components. Many DXC vendors are also advancing their capabilities in integration and orchestration, becoming good citizens of the build approach. Both market categories are creating competitive pressures for DXP vendors.

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.

Completeness of Vision

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.