

Magic Quadrant for Web Content Management

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Summary

Web content management now constitutes mission-critical software to help drive successful communications with customers. Application leaders focused on enabling effective digital experiences should use this document to help them in selecting the most appropriate vendor and solution.

Market Definition/Description

Gartner defines web content management (WCM) as the process of controlling the content to be consumed over one or more digital channels through the use of specific management tools based on a core repository. These solutions may be procured as commercial products, open-source tools or hosted service offerings. Product functionality goes beyond simply publishing web pages, to include:

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

- Repositories that organize and provide metadata about the content

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

- Content deployment functions that deliver prepackaged or on-demand content to web servers

- A high degree of interoperability with adjacent technologies such as customer relationship management (CRM), digital asset management (DAM) and web analytics

- Capabilities such as real-time personalization of visitor interactions

- The ability to integrate well with delivery platforms such as e-commerce, social media and portal software

Magic Quadrant

Figure 1. Magic Quadrant for Web Content Management



Source: Gartner (July 2017)

Vendor Strengths and Cautions

Acquia

STRENGTHS

Acquia has a very strong position in this Magic Quadrant, being the best-known provider of cloud capabilities around the highly popular Drupal open-source platform.

Acquia has done well to promote adoption of the latest version (8.x) of Drupal, which has enabled this community to compete well with the "closed-source" larger vendors that also feature in this research.

Acquia has supplemented its services around its core Drupal platform with Acquia Lift, which is very popular across multiple verticals for personalization and recommendations.

CAUTIONS

Acquia's marketing effectiveness is affected negatively by a disproportionate emphasis on its product's technological prowess and not enough emphasis on the business contexts in which it should be considered.

Acquia's pricing model needs to be streamlined to be more consistent from region to region, because it has sometimes led to confusion among prospect organizations. Decision makers should seek clarification of the anatomy of pricing proposals and ensure that the required investments scale with the ongoing success of the solution.

Gartner has received mixed feedback from multiple sources regarding the professional services recommended and supplied by Acquia. Decision makers should examine their sourcing strategy carefully – with a view to optimizing the inclusion of resources from Acquia into their overall program of work, while also ensuring the primary implementation partner has the necessary experience and reusable assets to enable a smooth and successful deployment and optimization of the solution.

Adobe

STRENGTHS

Adobe's market understanding and product vision have consistently inspired WCM customers and prospects; making what might otherwise have seemed mundane and tactical into a vehicle for business transformation, and nurturing the relationships of its customers with their target audiences. Adobe has effectively raised the expectations and aspirations for customers, compelling its competitors to follow.

The release of Adobe Experience Cloud signifies Adobe's intention to support use cases well beyond digital marketing – accommodating more of the customer life cycle use cases, including digital commerce user journeys, and opening its doors to other audiences. Adobe's expertise – gained through experience with global multibrand organizations – shows. Adobe Experience Cloud accounts for the expansive partner and agency ecosystems of internal and external content sources and destinations.

Adobe continues to improve Adobe Experience Manager's already highly esteemed user interface. Advances in low-code development of pages and dialogs, new "content fragments" and "fluid content" will provide better support for cross-channel experiences, while further empowering business users such as marketers and merchandisers.

CAUTIONS

Prospect organizations sometimes exclude Adobe from consideration because of the perceived high cost of its solutions compared to those of its direct competitors. While this impression is warranted in some cases, it is a barrier to engagement that prevents prospective customers from seeing the potential return on investment in a high-quality WCM system.

Adobe customers often underestimate the effort and complexity of an Adobe Experience Manager implementation, especially in the initial phases. Organizations considering this solution should devise a thorough sourcing strategy – selecting a partner with proven expertise, experience pertinent to the industry and use case, and a store of assets such as web components, prebuilt sites, templates, apps and connectors that can be reused and configured to hasten the time to market.

Adobe's aggressive and forward-thinking approach in articulating its "Clouds" has led to some customer disappointment. Adobe's acquired offerings have introduced various architectures and repositories under the cover of its Clouds, and customers sometimes find that product complexity is increasing and integration is difficult – far from being "seamless," as is advertised. Unifying the architecture is, of necessity, a work in progress.

Automattic

STRENGTHS

Automattic has a unique position in the world of WordPress open-source software, being the most prominent provider of WordPress-related platform services. Decision makers should include Automattic in their shortlist if they are considering an enterprise application of WordPress.

Automattic gains from the fact that WordPress has, arguably, the most-recognized brand in the broader area of WCM and website management software. Currently, around 28% of all websites are based on some form of the WordPress platform.

WordPress is very popular with designers, who value its customizability and flexibility. Influence coming from this audience is growing stronger, as organizations' appreciation for its user-experience design increases, putting Automattic in a strong position.

CAUTIONS

While it's used widely by enterprises for distributed sites, landing pages, microsites and social sites, Automattic is used as a central strategic WCM system for relatively few large enterprises across verticals when compared with the leaders in this year's Magic Quadrant.

Automattic continues to maintain a marketing focus on WordPress users and has not been very effective in competing against some of the other WCM vendors featured in this report. Prospect organizations may need to invest more effort in order to find relevant case studies and customer references when considering Automattic for "longlists" or shortlists.

Automattic emphasizes a strong subset of more than 40,000 plug-ins available for the WordPress platform. However, it needs to be more prescriptive when advising users on how to approach their programs of work and what modules should be invoked when. Decision makers should insist on such guidance, *and* real-world examples, before making their final selection in favor of its WordPress.com VIP cloud hosting service.

BloomReach

STRENGTHS

Since its acquisition of Hippo in October 2016, BloomReach now offers an experience platform in addition to the capabilities it already had on offer around digital commerce search and digital personalization.

BloomReach has an excellent reputation around the application of machine learning to drive effective commercial interactions. The combination of these existing capabilities with those of Hippo resonates highly with selection scenarios for WCM in the current market, and will continue to be strong. It is, in part, these synergies that have enabled BloomReach's inclusion in the Leaders quadrant this year.

BloomReach Experience provides versatility in its supported deployment models and enables high levels of interoperability with multiple systems. Capabilities such as partial page rendering allow it to work smoothly with other digital platforms and applications.

CAUTIONS

BloomReach is a newcomer to the WCM market, and less known in Europe and Asia/Pacific, while Hippo is not very well known in either North America or Asia/Pacific. Decision makers should therefore examine carefully the rate at which BloomReach is executing on its vision — to combine its success in digital commerce with the potential of BloomReach Experience — in other regional *and* vertical areas of focus.

The acquisition by BloomReach, a closed-source company, of one such as Hippo — with a business model based on open-source software (OSS) and subscription-based revenue — will inevitably introduce complexities and inconsistencies with regard to pricing. Decision makers should therefore request details of pricing for individual components, in addition to projections of the required multiyear investment, in order to achieve full transparency and optimize the required investment over time.

BloomReach still needs to build out its partner ecosystem quite aggressively in order to compete with the other Leaders featured in this research. Decision makers should scrutinize carefully the type and availability of suitable partners as part of their core selection process.

CoreMedia

STRENGTHS

CoreMedia's offering has excellent, well-proven interoperability with digital commerce and portal vendors such as IBM, SAP Hybris, Magento and Salesforce Commerce Cloud (previously Demandware). As a result, it can offer multiple architectural possibilities, including headless, commerce-led and content-led.

CoreMedia has great examples of capabilities that promote ease of installation, migration, implementation and an overall better time to solution. These capabilities include accelerators that embody best practice methods and enable organizations to adopt a highly agile approach to their solution's development.

CoreMedia CMS has a highly usable, well-designed interface for different business personas, including content authors, marketers and merchandisers.

CAUTIONS

CoreMedia's presence in the North American market remains modest compared with the other European vendors featured in this report. Decision makers in North America should therefore assess the available local partners and service-level agreements as part of their selection process.

CoreMedia appears in the longlists and shortlists shared with Gartner much less frequently than its primary competitors. This could affect its ability to execute well in the longer term.

The pace of product development at CoreMedia lags behind that of some of the Leaders in this year's Magic Quadrant. Decision makers should inquire into its ongoing roadmap, with a view to comparing expected progress at CoreMedia with that required for their ongoing solution's development.

Crownpeak

STRENGTHS

Crownpeak has extensive experience in the cloud, being one of the first software as a service (SaaS) providers worldwide in the WCM space (as far back as 2005). This experience is particularly important for those prospects that may be risk-averse with respect to taking their WCM solution off-premises.

Crownpeak has successfully augmented its core WCM offering with both additional security capabilities for cloud deployments and its Digital Quality Management platform, which helps ensure multichannel compliance with quality and compliance requirements and rules.

Crownpeak's vertical strategy, which places a high focus on those contexts where regulatory compliance has a higher priority – such as financial services and healthcare – brings security strengths and data quality management to bear on these industries.

CAUTIONS

Crownpeak's marketing effectiveness still lags behind that of some of the other vendors featured in this research. Its messaging needs to be better tailored in order to resonate more effectively with the different target audiences for that messaging.

Its partner ecosystem is modest compared with those of other vendors featured in this report. Gartner rarely sees Crownpeak being recommended by independent services vendors. Organizations considering Crownpeak should assess their own sourcing strategy for implementation prior to final selection.

Functionally, Crownpeak lags behind some of the leaders in this report in some areas sought after by more leading-edge prospect organizations. These areas include, for example, the incorporation of machine learning for advanced personalization and multivariate testing.

Episerver

STRENGTHS

Episerver has strengthened its overall Digital Experience Cloud platform, including its full digital commerce capability, and timely and well-executed acquisitions. For example, the Peerius acquisition of August 2016, which surfaced as Episerver Personalization, brings machine learning to the entire portfolio: It enhances site search in Episerver Find; product recommendations in Episerver Perform; event triggering in Episerver Reach; and continues to inform and accelerate enhancements in visitor intelligence, dynamic segmenting and customer journey analysis.

Episerver has done well in retaining the substantial Ektron installed base and converting it to the Episerver Digital Experience Cloud. High levels of attrition often accompany mergers in enterprise software, especially in a crowded and competitive space such as WCM. Episerver has effectively marketed well to its strategic customers, instilling in customers a confidence about its direction. It also provides customers and partners with prepackaged expert services to facilitate product conversion. The Ektron conversion is partly responsible for Episerver's greatly increased regional presence.

Episerver is doing more than most WCM providers to equip, encourage and enable customers to exploit the cloud. Episerver Digital Experience Cloud is a platform as a service (PaaS) solution, and includes environments for integration, preproduction and production. All environments are fully managed by Episerver, obviating the need in many cases for separate relationships with content delivery networks or other complementary providers. Episerver also offers prepackaged services to customers and partners, for migration to the cloud, which have proven to accelerate on-premises to cloud transitions.

CAUTIONS

Some Episerver customers report an unanticipated complexity of implementation, coupled with a lack of responsiveness directly from Episerver. Organizations considering Digital Experience Cloud should carefully assess their sourcing strategy in advance of final selection and also ensure the right level of attention and involvement from Episerver throughout the program of work.

Episerver requires considerable product-specific and .NET expertise, requiring organizations to hire or train an in-house expert or be dependent on an experienced system integrator. Organizations report that customization and configuration requires technical expertise.

Those considering Episerver Find to drive search-driven experiences and merchandising should inquire thoroughly about the existing and planned capabilities for these scenarios, together with ample reference cases where these capabilities are so applied. Insight engines represent an innovative and rapidly evolving space requiring dedicated attention and support.

e-Spirit

STRENGTHS

e-Spirit's FirstSpirit is a well-architected product that has a high level of interoperability with adjacent technologies and a rich set of easy-to-use functionality for business users in a well-designed user interface.

e-Spirit has strong capabilities across multiple verticals with good references in manufacturing, branded sites and retail.

Improvements in e-Spirit's go-to-market strategy, including establishing relationships with partners and a more aggressive partner strategy in North America, have contributed to the steady growth of its business.

CAUTIONS

While e-Spirit has made strides in North America, largely via partnerships, market awareness among its end customers remains low relative to other providers and its penetration of this important market is less than for some of the other Europe-based vendors featured in this research.

Whereas much of the WCM market has found its growth among marketers and customer experience initiatives, e-Spirit's remains with IT. This could be regarded as a strength, considering broader initiatives and the need to integrate with multiple established systems. However, it may also reduce e-Spirit's potential for continuous improvement in the areas of usability and advanced features for marketing and content managers focused on customer experience.

Although e-Spirit does currently offer delivery capabilities such as "production" website management capability and presentation layer as part of its overall offering, these areas require improvement in order to serve as positive differentiators in today's market.

eZ Systems

STRENGTHS

eZ Systems' business model – combining an established OSS platform with commercial backing for support and hosting – is in high demand in the current WCM market and this is likely to continue to grow.

eZ Systems' pricing strategy is very clear, intuitive, predictable, reasonable and flexible compared with other offerings in this Magic Quadrant. Prices start at less than \$20,000 per year and allow organizations to scale at a pace that suits them. Progressive steps for increased investment are well-defined and make sense, given related demand in both the midmarket and at the enterprise level.

eZ Systems possess broad experience and deep expertise in the publishing domain, but also has good references in e-commerce integration.

CAUTIONS

The majority of eZ Systems' revenue originates from Europe, while its presence in North America is small in contrast to the competition. Organizations considering its products should inquire about both the availability of local- and domain-relevant expertise and the timely availability of support.

eZ Systems' partner ecosystem continues to be very small, in contrast to other vendors featured in this research. Decision makers should therefore assess the suitability and availability of certified implementation partners as part of the core selection process.

eZ Systems' overall market presence and brand recognition remains very small and this could affect its ability to execute well in the longer term.

GX Software

STRENGTHS

GX Software has strong messaging around the "Customer For Life" that will resonate strongly with decision makers keen to enhance their cross-channel continuity across the marketing, buying and customer service phases of the customer journey.

GX Software has a good, verticalized strategy with strong reference customers in financial services, telecommunications and fan-based organizations (sports).

GX Software's XperienCentral works well with BlueConic, an engagement analytics product previously spun off from the company.

CAUTIONS

Despite some improvement to the user interface of XperienCentral, its user friendliness and the level of capability provided for business users are still modest compared with that provided in many of the competing offerings featured in this report.

GX Software's penetration of the North American market is far lower than that of some of its Europe-based competitors.

GX Software's partner ecosystem is much smaller than that of most of its competitors. While it does have a positive reputation for its own professional services, decision makers should include the identification and availability of partner resources as part of their selection process.

IBM

STRENGTHS

IBM has been effective in demonstrating the potential of artificial intelligence to transform web content management processes. Watson Content Hub can automatically classify and tag images and rich media, continually learning from successful patterns. IBM is also using machine learning in both of its WCM offerings, to enable real-time personalization, apply sentiment analysis to content targeting, and automatically identify and aggregate relevant content from disparate sources.

IBM Watson Content Hub eliminates the friction of a once cumbersome and hard to access sales, acquisition and deployment process for prospects and customers. Watson Content Hub is readily accessible online to be tested. Clear descriptions and low starting prices allow organizations to start small and grow incrementally as they realize benefits.

IBM has broad and deep industry expertise. Few other providers are as adept at understanding and delivering to the sophisticated requirements and aspirations at the intersection of IT and the business as is IBM.

CAUTIONS

IBM is promoting Watson Content Hub aggressively, but IBM Web Content Manager is more mature and functionally complete. Organizations seeking WCM to support digital strategies must carry out selection processes with a view toward future as well as immediate needs. IBM has taken steps to integrate Watson

Content Hub into Web Content Manager to make this decision easier, and we expect it to continue with this hybrid approach.

The IBM Web Content Manager's user interfaces lag behind those of other WCM leaders. Other providers have advanced further in empowering business users to easily and effectively manage more of the user experience.

IBM's marketing has been relatively ineffective in raising its mind share as an expert in the WCM space. IBM is notably absent from organizations' shortlists, except where the organization already has a strategic investment in IBM technology — especially WebSphere Portal and WebSphere Commerce.

Kentico Software

STRENGTHS

Kentico exhibits excellent market presence and global reach for a provider focused on WCM. For a European company, Kentico has done particularly well to penetrate the North American market. Kentico continues to nurture a strong partner ecosystem in multiple geographies.

Kentico is particularly attractive for midmarket organizations. Customers regard it highly for ease of use and deployment, especially for relatively simple sites. In addition to WCM, Kentico incorporates complementary capability scoping into digital commerce, campaigns and analytics.

Kentico's pricing is transparent and low relative to most other vendors featured in this report. It is highly appealing to those organizations wishing to start small and grow at a pace of their own choosing.

CAUTIONS

Kentico's pursuit of a dual product strategy — one for Kentico on-premises (currently Kentico 10) and one for Kentico Cloud — is not consistent with the strategic demands of the WCM market. The new headless, cloud-based system is initially targeted for digital agencies and their clients, but as an emerging development it may represent a dilemma rather than a useful alternative to current customers and prospects. Decision makers should therefore analyze their options carefully, require detailed roadmaps of the respective products and choose in accordance with their longer-term goals.

Kentico's vision is focused primarily on marketing and commerce. Organizations seeking to enhance digital engagement across additional phases of the customer lifetime journey (for example, early nurturing, customer service and support, and advocacy) should ensure good interoperability with the established technologies used for those phases.

Some customers report problems with upgrades, with customizations limiting their ability to take advantage of new features.

OpenText

STRENGTHS

OpenText enjoys global brand recognition in the broader area of content and information management. An enormous customer base among large organizations gives OpenText ample opportunity to grow. OpenText's track record for vertical solutions further solidifies its appeal.

OpenText has amassed numerous organically developed and acquired assets, including WCM, document management, business process management and customer communications management, to support the entire customer journey. Many WCM providers focus only on single points in the journey, most frequently customer acquisition through marketing. OpenText's offerings support customer service and support.

OpenText TeamSite is a mature cloud offering that incorporates adjacent technologies such as DAM, customer communications management, content marketing, experience analytics, and surveys and forms; capabilities that organizations commonly wish to couple with WCM.

CAUTIONS

OpenText's acquisitive business practices have resulted in a portfolio of overlapping products. In WCM alone, the company has acquired capabilities and customers from HP (now OpenText TeamSite), Vignette (now OpenText Web Experience Management) and Hummingbird (now OpenText Web Site Management).

OpenText worked to rationalize the offerings and provide a direction – OpenText TeamSite will be the strategic focus moving forward – but organizations must ensure that a product's direction is aligned with their goals.

OpenText TeamSite customers report unanticipated complexity, which requires product expertise that is increasingly hard to find. Organizations should pay careful attention to sourcing when undertaking WCM initiatives using TeamSite.

OpenText and its WCM products have lost momentum among its customers. Considering OpenText's breadth, global presence and WCM heritage, Gartner rarely sees OpenText on shortlists for new WCM and digital experience initiatives. Influential digital agencies and system integrators are less likely to promote or develop expertise on OpenText's WCM systems than on the systems of some of the Leaders in this year's report.

Oracle

STRENGTHS

Oracle's Content and Experience Cloud Strategy, with "content enriched data," is geared to transcend outmoded boundaries between content and data. It promises the versatility and comprehensiveness to support a broad range of initiatives, including marketing, commerce, service and partner relationship management, plus employee experience and supply chain management.

Oracle has made great progress with rationalizing its extensive product portfolio while positioning Content and Experience Cloud as a common service that helps leverage, coordinate and unify experience across applications and channels.

A powerful aspect of Oracle's strategy moves beyond the typical role of content management. Whereas most WCM systems start with the relatively simple proposition of putting content into the hands of content owners, Oracle is also looking toward methods for low-code application building that exploit a service catalog of data connections.

CAUTIONS

Oracle must regain the confidence of customers who have experienced shifts in its WCM strategy through various acquisitions and product developments. Oracle Content and Experience Cloud is a step in the right direction, but it may appear to be a shift in strategy and therefore represent additional complexity for some customers.

Some customers and prospects express frustration when, seeking what they regard as a complementary "feature" of WCM, they are pointed to an entirely separate product, sometimes with a different Oracle sales team. Organizations should build capabilities models to ensure an accurate understanding of how Oracle's product portfolio, or any vendor's product portfolio, meets their technical and business requirements.

Oracle WebCenter Sites is conspicuously absent from selection processes when prospect organizations favor offerings characterized as best-of-breed and highly interoperable.

Progress

STRENGTHS

Progress has a good reputation among its customers for ease of deployment and usability across developer, administrator, content manager and marketing roles. Sitefinity makes some normally complicated capabilities – such as multilanguage sites, mobile sites, personalization and actionable analytics – accessible and straightforward.

Progress' expertise and heritage as a provider of development tools and platforms puts it in an ideal position to help with WCM in the context of overall digital solution development.

Progress' Digital Experience Cloud is a compelling option for organizations with a focus on application development enriched by web content and advanced analytics.

CAUTIONS

Contrary to most of the market, Progress has shifted its messaging away from business influences and toward technology influences. Its DigitalFactory messaging (in early 2016) has now given way to application development, together with forward-thinking yet tactical considerations around mobile, APIs and cognitive computing. While this positioning is differentiated and plays to the Progress base, it won't be as likely to resonate with business leaders driving digital strategies.

Progress' partner ecosystem for WCM-related scenarios is far less extensive and developed than those of many of its immediate competitors. Decision makers should include in their selection process detailed questions concerning the availability of appropriate partners to help with the planning, building and running of their solution.

Some Progress customers report a less-than-satisfactory response from the company at various points in the sales and support cycle.

SDL

STRENGTHS

SDL's extensive experience, customer track record and complementary services make it a premier provider of WCM for organizations requiring language translation and localization at scale. The architecture required to support this use case also equips it well for complex multichannel initiatives and contextualized digital experiences.

SDL is poised to apply its machine translation and associated machine-learning expertise to a wider range of content requirements – as web experiences progress toward digital – including human-to-machine interactions, conversational interfaces and the intelligent generation of content.

SDL has demonstrated strength in enabling collaboration between creative agencies, designers, integrators, developers and end customers, offering the ability to provide in-context editing features in single-page-sites and apps.

CAUTIONS

SDL's tendency to emphasize the language and translation capabilities of SDL Web, along with associated products and services adjacent but not directly involved in WCM, has diminished its marketing effectiveness. SDL is noticeably absent from many customer shortlists, even when the product appears to be an ideal fit.

In early 2016, SDL executed leadership changes. A strategic decision to renew its focus, and the consequent divestiture of some acquired technology have raised uncertainty among customers and slowed down SDL's momentum in the WCM market. Current and prospective SDL Web customers should ensure that SDL's new focus and roadmap in the WCM space is in line with their goals and preferences.

Prior to the restructuring and personnel changes, some SDL Web customers reported interruptions in customer support and service. Prospect organizations should request evidence to support SDL's claims that these issues are now firmly behind them.

Sitecore

STRENGTHS

Sitecore enjoys unparalleled WCM market presence, ranging across industry, regional and size segments. It appears on Gartner client shortlists more frequently than any other provider. This is a testament to its marketing execution, its go-to-market strategy and its consistent focus on WCM demands.

Sitecore expertly balances the seamless experience of its own features – as it extends further into marketing and digital commerce roles – with interoperability with third-party software and services. Sitecore's Data Exchange Framework provides a bridge for exchanging content with any external source, and even allows for exchange of data among third-party systems. Also, Sitecore's emerging cloud-versatile microservice architecture is designed to eliminate the need for custom-coded integration.

Sitecore does more than most other providers to ensure customer success. Its Sitecore Business Optimization Strategies (SBOS) – a set of best practices on processes, methodologies and tactics embedded into the partner ecosystem – guides organizations on how to exploit Sitecore's WCM capability

based on their maturity and their level of aspiration. The Sitecore Experience Accelerator (SXA) provides templated layouts and components to get sites up and running quickly.

CAUTIONS

Some customer feedback reflects unexpected complexity and difficulty in exploiting some of the capabilities of the Sitecore Experience Platform in combination with Experience Database (xDB).

Some customers, partners and prospects report a lack of responsiveness when attempting to work with Sitecore directly. Application leaders wishing to interact directly with Sitecore should first establish a reliable point of contact.

Sitecore is in the process of architectural adjustments on the path toward improved interoperability and support for cloud deployment. Any changes are most likely to impact organizations with complex and heavily customized sites.

Squiz

STRENGTHS

Squiz's offering is a combination of its OSS Customer Experience Platform (CXP) and sound support and commercial backing – which amounts to a business model popular with decision makers. This combination is becoming even more important as the complexity of solutions increases, along with the need for interoperability.

Squiz displays a good understanding of the market's current and likely future dynamics, as shown by its independent software vendor partnership strategy. Its partners include Marketo and SugarCRM.

Customer feedback is complimentary about the ease of use of Squiz's CXP, its low total cost of ownership, high extensibility and strong product qualities.

CAUTIONS

Squiz's presence in North America is less than it needs to be in order to represent serious competition to other vendors in this Magic Quadrant that are making significant advances in this region and in the overall market.

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.

Recognition of Squiz's brand is relatively low when compared with its main competitors. As a result, it is often omitted from selection processes in situations where it would be a good fit.

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

BloomReach

Dropped

Hippo – it has now been acquired by BloomReach

Inclusion and Exclusion Criteria

The inclusion criteria for this Magic Quadrant are:

Total WCM software revenue: The total WCM software revenue for 2016 must exceed \$17 million.

- Total WCM software revenue includes the revenue that is generated by sales of WCM software and software maintenance and support services. Total WCM software revenue is aligned with:

License – The right to use the software based upon contract type (perpetual or term license)

Cloud – Revenue for cloud services including business process as a service (BPaaS), infrastructure as a service (IaaS), platform as a service (PaaS) and SaaS

Subscription (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 – Contract fees for support services (not including training) and new versions, updates and upgrades

- Total WCM software revenue excludes revenue from professional services and the sale of products manufactured by other vendors. 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 business for more than five years, with a multigeographic presence for at least a year and a strategy that supports further geographic expansion. It must actively market its WCM offering in at least two of the following major regions: North America, Europe, the Middle East and Africa (EMEA) and Asia/Pacific.

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

Ecosystem activity and market interest: As evidenced by 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 to analysts via the Gartner call center or at Gartner conferences via one-on-ones, is also taken into account.

Commercial availability: The vendor must have WCM software commercially available and active references that use the product in production scenarios. Some of these references should be of enterprise scale, with the number of contributing authors exceeding 50 and the average monthly number of page views comfortably exceeding 500,000 – though deployments supporting even larger numbers of users are preferable.

From a functionality perspective, the included vendors must offer the following at a minimum:

The WCM offering must be available as a stand-alone product or 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 independent of content

Support for multiple roles including, for example, developer, administrator, editor, marketer and author roles 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, such as tablets, smartphones and smart TV, over multiple channels such as Facebook, twitter and LinkedIn

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

Web analytics and reporting

Design

Content modeling

Metadata management

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

Sales execution/pricing: Evaluates the 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 the WCM offering matches buyers' requirements at the time of purchase. We assess the vendor's track record in delivering new functions when the market needs them. We also consider how the vendor differentiates its offerings from those of its major competitors.

Marketing execution: Evaluates the clarity, quality, creativity and efficacy of the 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, including:

Ease of deployment

Operation

Administration

Stability

Scalability

Vendor support

- We assess this criterion, where possible, through qualitative interviews with vendor-provided 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	
Product or Service	
Weighting	High
Overall Viability	
Weighting	Medium
Sales Execution/Pricing	
Weighting	High
Market Responsiveness/Record	
Weighting	High
Marketing Execution	
Weighting	Medium
Customer Experience	
Weighting	High
Operations	
Weighting	Medium

Source: Gartner (July 2017)

Completeness of Vision

Completeness of Vision focuses on the vendor's potential and points to its future chances of success. A vendor can succeed financially in the short term, but won't become a Leader without vision and a strategic plan. A vendor with average vision will 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 it integrates its vision into a range of areas – and capitalizes on product and service development. We used the following criteria to assess Completeness of Vision:

Market understanding: Evaluates the vendor's ability to understand buyers' needs and translate those needs 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 customer requirements in areas such as SaaS, dynamic contextualized delivery and ease of use by nontechnical staff.

Marketing strategy: Evaluates the extent to which the 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 the 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 the vendor's development plans for the next 12 to 18 months.

Business model: Evaluates the soundness and logic of the 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 the 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 the vendor's development and delivery of differentiated WCM technology that addresses 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/multichannel
- Content delivery
- Personalization
- Architecture
- Cloud capabilities

These product areas are referred to in more depth in "Critical Capabilities for Web Content Management," which is cited in the Recommended Reading section.

Geographic strategy: Evaluates how the 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	
Market Understanding	
Weighting	Medium
Marketing Strategy	
Weighting	Medium
Sales Strategy	
Weighting	High

Offering (Product) Strategy	
Weighting	High
Business Model	
Weighting	Medium
Vertical/Industry Strategy	
Weighting	Medium
Innovation	
Weighting	High
Geographic Strategy	
Weighting	Medium

Source: Gartner (July 2017)

Quadrant Descriptions

Leaders

Leaders should drive market transformation. Leaders 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 as well as horizontal contexts

Challengers

Challengers are solid vendors that can perform well for many enterprises, but may lack the vision to guide customers through the future. A Challenger may have a strong WCM product, but a product strategy that does not fully reflect market trends. It might, for instance, put 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 machine learning to optimize design or they may generally set the market's direction through innovation and product development. To become Leaders, they need to improve some of the core aspects of their offerings and business ecosystems to increase their Ability to Execute. They may also need to build financial strength, functional breadth, service and support, geographical coverage, or 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 size, industry and project complexity. This narrowness of focus can be of benefit to organizations aligned with their niche, but can 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. Use it to help 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 market isn't what it used to be. While once application leaders could devise concrete requirements and compare them against the market's offerings, WCM's more strategic impact in the context of digital business raises the stakes and broadens decision factors across the business. Successful selection necessitates cross-departmental collaboration, rich insights into the direction of the organization, the identification of strategic objectives necessary to support that direction, and the individual business outcomes that help map progress, success and quality along the resultant path.

Three forces have driven recent developments and paved the path for the future. These forces arise from the increased aspiration of buying organizations, their broadened perspectives with regard to the context in which WCM provides its value and, contrastively, a deepening frustration arising from the ongoing confusion and difficulties in achieving both.

Increased Aspirations

It has taken almost 20 years for WCM to become the overnight success it now is. The promises of the late 1990s became the disappointments of the early 2000s, and are now the realistic possibilities in the sights of application leaders across all verticals, both in the midmarket and in larger organizations. WCM now constitutes mission-critical software, particularly for those organizations wishing to advance their digital marketing strategy and improve customer communications. Time to first value is getting shorter and the ability to derive greater value agilely from the WCM is increasing. Both IT and lines of business are finding ways of combining WCM with adjacent technologies to democratize insights from analytics and to render transparency into progress toward the strategic goals laid out at its inception. Intelligent delivery, rich analytics and visualizations, cross-channel continuity and advanced personalization are just some of the strongest contributors to these increased aspirations.

Broadened Perspectives

WCM is breaking out of its marketing confines. The pursuit of superior customer experience has forced organizations to broaden the scope beyond customer acquisition to all phases of the customer life cycle, and beyond the traditional destination website, to the growing multitude of digital channels. Early adopters are now looking to leverage traditional CRM technologies with a wider set of customer-facing technologies – such as portals, content services, business process management, self-service, video and social interaction tools – for competitive differentiation. These solutions leverage the information integrated in the customer information base. This has forced organizations to acquire and recruit new skills in design, user experience and in new forms of analytics. In essence, the value of the solution to which the WCM software contributes will be based on far more than just "seamless integrations" on the back end; the bar of expectation will also be raised – to include the continuity of engaging communication across multiple phases of the customer lifetime journey, including from marketing to transactional commerce to customer service and support.

Deepened Frustration

It's not, however, all sweetness and light in this market, and for many their current situation represents a burning platform. WCM software for those appears to have taken on the mind of a misanthrope and has become the bringer of chaos, distracting and stifling efforts to ensure customer engagement rather than facilitating such efforts. For these organizations, the choice is very often either to figure things out themselves or to invest heavily in external consulting to get things back on track. WCM vendors typically choose not to step up to the challenge of facilitating, at least in part, the digital transformations required by their customers in order to realize their aspirations across the full breadth of possibility. Most WCM vendors still expect the partner community to fill this void – and this represents a caution to all buyers planning, or already engaged in, a selection process. All too often, prospect organizations place the necessary focus on technology, but underprioritize the role of people and processes. They underestimate the importance of these factors in building the success of the solution in which the WCM software plays a central role.

The evolution of the WCM market will be determined in part by vendors that both fuel and support this new world of WCM. Leaders in this year's Magic Quadrant have all made contributions in this regard. The true winners in this market, however, will be not only the vendors who raise such expectations; they will be those who can inspire organizations with a clear and compelling vision, guide customers forward with demonstrable and repeatable best practices, and enable them to execute incrementally, iteratively and effectively on that vision.

Acronym Key and Glossary Terms

DAM	
OSS	
digital asset management	open-source software
TCO	
digital asset management	total cost of ownership
WCM	
digital asset management	web content management

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 the 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 the reference customers provided 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 on 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.

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.

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