The Aragon Research Globe™ for Content Experience Platforms, 2023

Personalizing Journeys via Content and Conversations

Author: Jim Lundy

Video Producer: Adam Pease

Topic: Content Experience Platforms (CXP)

Issue: Who are the content experience platform providers and how will they evolve?

How will the intelligent content analytics market evolve?

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SUMMARY

Aragon Research releases its second Aragon Research Globe™ for content experience platforms. This Globe for CXP examines 18 providers and is about shifting web experiences to intelligent dynamic journeys that increasingly will even more personalized with Generative AI search and chat.

Key Predictions

Prediction: *By YE 2024, 65% of large enterprises will migrate to the dynamic experience delivered by content experience platform (CXP) (70% probability).*

Prediction: *By YE 2024, 50% of CXP providers will offer conversational search as part of their platform offering (70% probability).*

Prediction: *Through YE 2024, enterprises that are eCommerce-focused will need to deploy a CDP in order to build a data-driven customer profile to enable predictive buyer experiences (50% probability).*

Prediction: *Through YE 2024, 40% of enterprises will add generative AI-based search and virtual agents to their existing web experience (60% Probability).*

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Introduction

Websites are still one of the dominant ways to convey information and, increasingly, to sell products and services. Since we introduced content experience platforms (CXPs) in 2021, the market has taken off, and we are still in transition from the idea of a static experience to one that dynamic and personalized. The goal is to focus on buyer journeys that are interactive, individualized, connected, dynamic, and rich.

In 2023, buyers want this dynamic interaction and the ease of a personalized experience along with speed and flexibility because this is what users are attracted to.

With the ability to deliver rich content in a dynamic way, content experience platforms are already providing omnichannel content experiences. Generative AI promises to speed up the process significantly. This second Aragon Research Globe for Content Experience Platforms examines 18 providers who are making an impact in the market.

Content Experience Platforms Become the New Way Forward

In the last two years, content experience platforms (CXPs) have established this category that makes the ability to create and deliver dynamic experiences to users on any device a reality. Many industries have embraced this new form of personalized experience, and the days of static websites are winding down.

While early adopters have flocked to CXPs, there are still a majority of enterprises that have yet to make the leap. Aragon feels that enterprises that leverage CXPs gain a competitive advantage over those that only offer a static web experience.

New and upgraded offerings are harnessing content to provide integrated user experiences, moving beyond isolated content creation and delivery towards a comprehensive content development lifecycle that enables the construction of customized buyer journeys that meet the needs of users from their specific contextual perspective.

Customer experience has been the battle cry for several years, and CXPs are one of the best examples of how to improve the visitor experience and increase conversions in the process.

Prediction: *By YE 2024, 65% of large enterprises will migrate to the dynamic experience delivered by content experience platforms (CXP) (70% probability).*

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The Key Components of a Content Experience Platform

The key components that make up content experience platforms include (see Figure 1):

- Content Generation
- APIs and Integrations
- Content Management and Delivery
- Search and Content AI
- Cloud-Native
- *New!* - Generative AI
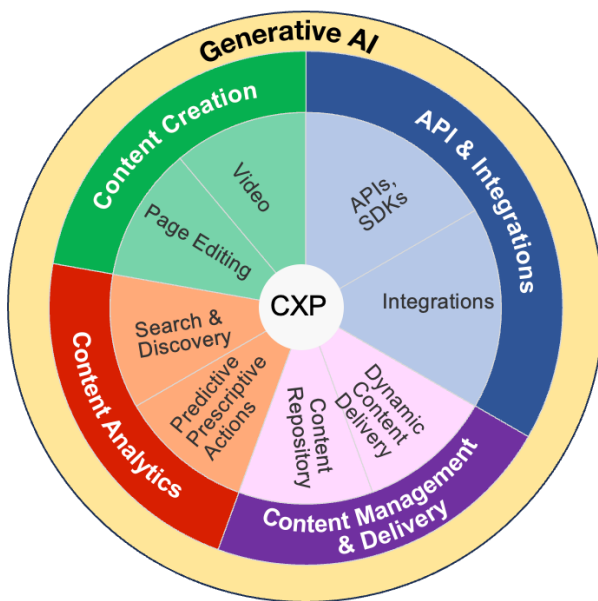
Figure 1: The architecture of a content experience platform (CXP).

Content Generation—Powered by Copilots

The way content gets generated just changed. With the rise of copilots, marketers will have assistants to help them with document, page, and image generation. Today marketers use a variety of systems to generate content, including Word documents, Google documents, translation software, digital asset managers, SEO tools, etc. CXPs are increasingly becoming the center of gravity for content generation by providing single-pane visibility and control over diverse systems and tools essential for content creation.

The way that users navigate a CXP will also change. Users have increasingly flocked to image and video-rich experiences. AR and VR remain opportunities. Many CXP

providers still partner for digital asset management offerings, but many are opening up their architectures, so video objects are part of the native content repository. For product-focused content, augmented reality is here, and while some providers support this content type, others partner to enable the rendering of the images.

While content delivery can be dynamic, there will now be a faster way to create more rich content than ever before. While CXPs were tied to developers and graphic designers just a few years ago, we have entered an age of no-code page and image generation. Aragon expects this to unleash a flurry of new product/service updates over the next eighteen months.

Content Management and Delivery—With Custom Generation

All CXPs need to store and manage content. CXPs will generate, store, and deliver custom content—in some cases, the customization is based on the user's conversational search prompt/chat. This is a fundamental change in the overall web and mobile experience. Given this change, enterprises need to ask CXP providers for product roadmaps.

However, with content generation, assembly on the fly has the opportunity to offer rapid customization in many circumstances.

When evaluating CXP providers, one key element that will help to justify the investment in a particular CXP is the ability to deliver content experiences to a variety of devices—not just PCs, laptops, mobile devices, kiosks, and displays. It is important to note that, even in 2023, mobile experiences for websites are often suboptimal. This is due to the use of legacy WCM providers who still offer a fixed content delivery experience.

With new delivery flexibility comes new use cases that not only support personal devices, such as watches and cars, but also publicly viewable devices, such as kiosks in malls and airports and hotels, and other IoT-enabled devices. CXPs make it relatively easy to add new digital touchpoints to the platform. No major changes are needed to any of the existing content.

Generative Content and CXP

Generative AI will impact every market, and this is due to the rise of large language models and the ability of these algorithms to assist humans with getting work done.

Aragon expects CXP providers to add generative content capabilities to assist with page creation.

What we expect to see in terms of copilots for CXP:

- Page creation, including text and graphics
- New generative AI capabilities will allow marketers to create draft content experiences by generating text copy and associated images to make a page pop and to complete this task in seconds, not hours or days.
- Layout options
- The ability to have the copilot offer different layout options also will give marketers the ability to pick options that are visually appealing.

The New Race for Conversational Search

Conversational search refers to a way to ask a platform to assist the user with finding information on a website. The ability to generate custom responses means that the idea of just displaying a website link is no longer the preferred approach—those days are over.

Conversational search will change how users interact with websites forever, and this represents a significant opportunity for vendors and for enterprises to up their game in how users navigate a website. While there will be a cost for conversational search, the difference will be a sticky experience with much higher conversion rates.

Prediction*: By YE 2024, 50% of CXP providers will offer conversational search as part of their platform offering (70% probability).*

Today, search is still vital to content experience platforms, but over time expect search to be shifted to complete chat-based conversations, with some being a much more customized experience than others.

Content Understanding Becomes Key to a Better Customer Journey

While we discussed the rise of content AI in the past, with generative AI, the ability to understand content becomes a basic part of the offering. This includes the ability to understand what a user is looking at. The fidelity of the content understanding that the provider offers will help to generate a more custom and dynamic experience.

Aragon expects that many providers will lean in on basic generative AI capabilities and that, over time, more content understanding will be integrated into CXP offerings as prices come down.

Microservices, APIs, SDKs, and GenAI-Based Search

CXPs must deliver flexibility due to the foundationally open nature of the platform. The need for flexibility in the experience means that integrations will be key. Decoupled, composable, API-enabled CXPs will be integral to delivering content experience. APIs will enable more integrations and more flexibility when it comes to the delivery of content.

One of the significant benefits of API connectivity is the ability to have automatic connections to mission-critical applications that make a CXP more automated and more integrated with the business process. New orchestration capabilities that allow developers and now marketers to quickly connect data sources via graph technologies are here.

Examples include:

- Creative editing applications—images and documents can be updated
- IP and governance systems
- Other content management repositories
- More seamless digital commerce integration
- GenAI-based search or chat

Additionally, an API-based CXP is perfectly positioned to use microservices as a way to build and maintain different modules in a large application. It also implies the ability to connect with other services, such as communicating with a customer data platform (buyer profile), analytics tools that can inform content creation, or IoT devices that can provide real-time input, which allows for the experience to be dynamically changed.

With the shift to conversational search happening now, we expect CXP providers to offer their own out-of-the-box GenAI capabilities as well as API integration with Amazon AWS, Google Gen AI, Microsoft Azure ChatGPT services, and others.

CXPs and Video/DAM Remains an Opportunity

Video remains an area for opportunity, and even today, video is often uncoupled from the core CXP engine. More providers have been working on this, but in many cases, With TikTok and Instagram, and YouTube Shorts driving huge daily viewers, CXP providers need to respond, and today, the answer is still to partner for digital asset management. This trend will only heighten as 5G infrastructure enables the lightweight delivery of video across networks and as new visual fidelity standards like 4K are generalized across devices.

Next-generation CXPs will do this natively and be object agnostic. This is particularly true for content generation, delivery, and analytics. Careful analysis of how rich media is managed by a provider, including the speed of delivery and the ease of use of management, should be

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taken into account. Even if a provider has the capabilities in-house, it is often a separate module that is used to manage the rich media assets.

Personalization via Customer Profiles, Customer Data Platforms, and GenAI

Customer data platforms (CDPs) will be a vital part of the shift towards intelligent customer retention. Today, the discussion is around buyer profiles, and CDPs are the information that helps to build out a buyer profile. A key outcome of a CDP is a unified profile. Aragon has written about user profiles for years, but it is only now that the unified customer profile is fully coming into its own.

While the need is key for commerce-focused CXPs, all marketers want more personalization for prospect journeys. CDPs can create a master index from multiple data sources that help establish a record of individual behaviors, buyer preferences, and patterns of action based on concrete metrics.

Pricing for CDPs and Data Platforms is consumption-based. There is a risk that many CXPs and the CRM providers they partner with will price CDPs/data platforms so high that the average buyer may not decide to invest.

For many users, the personalization from a Generative AI interface may be good enough. That said, for many firms, Generative AI may do enough to satisfy the average viewer. However, for commerce-focused sites where buyer intent is critical, CDPs will be a must-have.

Prediction: *Through YE 2024, enterprises that are eCommerce-focused will need to deploy a CDP in order to build a data-driven customer profile to enable predictive buyer experiences (50% probability).*

Prediction: *Through YE 2024, 40% of enterprises will add generative AI-based search and virtual agents to their existing web experience (60% Probability).*

Delivery and Personalization—The Need for Both

The need to deliver a great content experience to any device needs to be balanced with the need for personalization. The ability to author and structure content for publishing to any device is part of what makes CXPs unique. Likewise, the need to deliver a personalized experience is crucial.

Delivery to multiple devices isn't optional; it is an out-of-the-box set of capabilities. The ability of a CXP to recognize user profiles and behaviors will allow for a customized

dynamic experience. Aragon expects more enterprises to adapt customer data platforms and enable direct connections to the CDP to leverage the enhanced user profile.

Putting Third-Party Integrations to Work

The need for integrations goes without saying. APIs help to power the integrations and, with them, open up new possibilities for an even more contextual experience. Enterprises need to look carefully at this area and look at the possibilities of third-party integrations.

Some of the key integrations that should not be overlooked:

- Digital Asset Management (DAM)
- Blogging and Community tools
- Conversational AI (Chatbots)
- Digital Commerce
- eCDN
- Customer Data Platform (CDP)
- Customer Relationship Management (CRM)
- Marketing Automation Platform
- Digital Experience Analytics

Enterprises should look for signs of integration with real app stores and the ease of integration being the watchwords.

Optimizing Customer Journeys with Digital Experience Analytics (DEA)

The race is still on for the perfect customer experience. This CXM-based approach has been shown to drive revenue by cultivating a unique connection between users and platforms, which feel less like indifferent storefronts and more like carefully curated selections.

While many enterprises feel that when they buy a CXP platform, they are done, the reality is that analytics play a vital role in understanding what is happening with the site and with user journeys through the site. While Google Analytics was the answer for the last 15 years, there is a new way forward called digital experience analytics. It includes a growing number of providers that do things such as session replay heat maps and optimization of journeys based on actual usage.

Many CXP providers are increasingly partnering with DEA providers. However, in many cases, this is a procurement that happens soon after the CXP acquisition decision has been made. See Note 1 for a list of DAP providers.

Speeding Up Content Generation and No-Code Development

The opportunity that enterprises have with the next generation of CXPs is strong. The days of manually creating text and images for pages are winding down. In particular, the opportunity to create custom graphics that attract viewers represents a tremendous opportunity.

All basic page and image generation will be offered by digital work hub providers such as Google and Microsoft. Aragon feels that the opportunity for CXP providers to allow for more page customization and the development of no code journey orchestration is real.

One of the biggest challenges for marketing teams is building journeys that are also personalized. With advanced CXP platforms that offer generative AI capabilities, we feel that journey orchestration can be part of these new offerings. So, besides today's capabilities of dynamic delivery of content to different types of devices, we also see dynamic generation of new content based on what users ask the system for.

Figure 2 below summarizes how content generation and other layers of the CXP tech stack contribute to more personalized experiences.

Note 1: Digital Experience Analytics

The need to constantly understand user journeys via websites has meant a need for analytics. A new set of providers are making their mark in enabling an optimized experience. See the list of providers below:

Amplitude
Contentsquare
Fullstory
Glassbox
Heap
Mouseflow
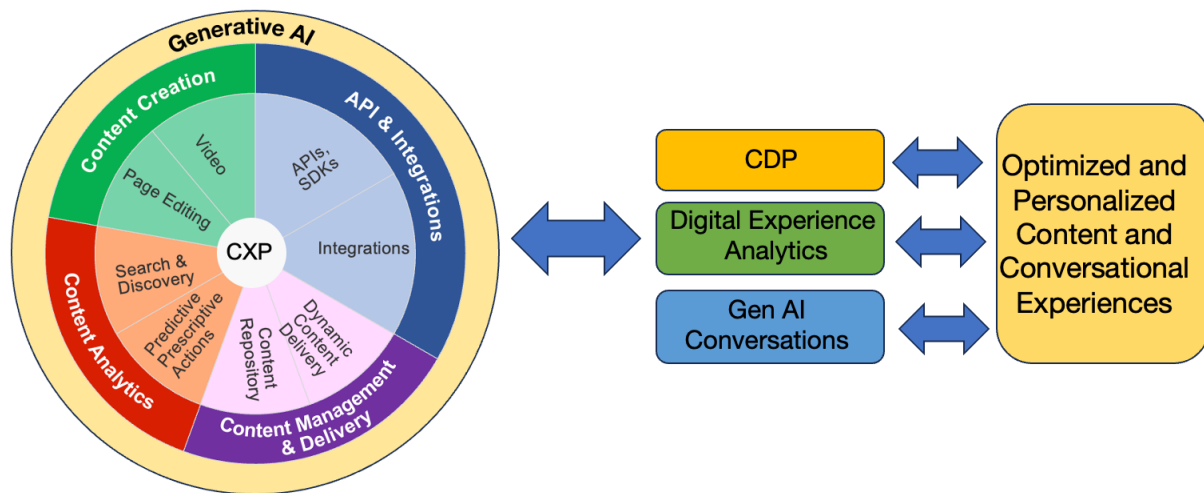**QuantumMetric**
Smartlook
Sprig

Figure 2: CXPs combined with CDPs, Digital Experience Analytics, and Gen AI means even more personalized experiences.

The Aragon Research Globe™ for Content Experience Platforms, 2023
(As of July 20, 2023)

Figure 3: The Aragon Research Globe™ for Content Experience Platforms, 2023.

Leaders

Adobe

Adobe, based in San Jose, CA, and led by CEO Shantanu Narayen, has continued to be one of the go-to platforms for content experience. Adobe Experience Manager (AEM) is one of the go-to offerings for Content Experience. AEM brings together AEM Sites for omnichannel experience creation and delivery, AEM Assets for digital asset management (DAM), AEM Screens for digital signage, and AEM Forms for responsive forms and customer communication. More recently, Adobe has continued its storytelling around leveraging AEM with Adobe Workfront and Adobe Creative Cloud to streamline what Adobe refers to as the Content Supply Chain.

In 2023 Adobe made a series of enhancements to AEM, including the ability to do native content authoring using either Google Docs or Microsoft Word and a performance-first delivery engine for optimizing the performance of experiences out-of-the-box. Adobe also announced Adobe Express for Enterprise, integrating Adobe Express and Adobe Firefly directly into Experience Manager Assets, enabling the generation of content variations by changing components such as colors, objects, and scenery that are ready for multiple channels—web, mobile, and email. Adobe Firefly brings Generative AI capabilities, including text-to-image and text effects.

Adobe Sensei, which is Adobe's AI/ML framework, enables the auto-tagging of media assets, such as colors and smart tags for text. Adobe Sensei is evolving to offer more understanding of content usage on sites than other offerings that leverage third parties. Adobe AEM now includes expanded headless CMS capabilities. It also offers quick site creation capabilities and AEM Assets Essentials, a lightweight DAM solution. Adobe continues to enable dynamic content delivery by allowing developers to leverage GraphQL.

Adobe AEM offers an automated forms conversion feature that supports batch conversion of PDF or XDP forms into mobile-friendly adaptive forms at scale. With its continued updates of AEM and its growing integration of the Adobe stack with AEM, Adobe is positioning itself for the growing demand for more personalized content experiences.

Strengths	Challenges
• Brand and financial stability	• Customers report high prices
• Install base	
• Marketing automation	
• AI-tagging of media assets	
• Partner network	
• Broad set of digitization components	

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Acquia

Acquia, based in Boston, announced new leadership, including President and Chief Executive Officer (CEO) Stephen Reny and Chief Market Officer (CMO) Jennifer Griffin Smith. Acquia offers a full enterprise-grade CXP platform that encapsulates and extends the capabilities of the open-source Drupal CMS. Acquia has significantly expanded its CXP product portfolio over the last two years and has now realized synergies across its content management, customer data management, and digital experience creation and personalization solutions. These include Acquia Site Factory for multisite and brand management, Acquia Site Studio for low-code experience creation, Acquia CDP, Acquia Personalization, Acquia Campaign Studio for marketing automation and customer journey management, and Acquia DAM and Acquia PIM offerings.

In September 2021, Acquia acquired and began offering its digital asset management (DAM) and product information management (PIM) products as part of Acquia DXP or standalone. Acquia DAM (formerly Widen DAM) is offered in a workgroup package for departments and small businesses and an enterprise package. A bonus for Acquia is that Acquia DAM works with products from many other CXP providers. This offers a way into new accounts, particularly those that need rich media, which is one of the biggest needs for most marketers today.

In April 2023, Acquia announced a partnership with KPMG to help enterprises accelerate their overall content experiences and customer data platform needs. The KPMG Customer Advisory team will leverage Acquia DXP to meet customers' marketing communication needs.

With its CDP, Acquia can enable customers to discover the predictive variables that are important for current and future campaigns. It also offers new compliance capabilities to assist with CCPA and GDPR regulations. Acquia focuses on consumer brands, retail, media, and entertainment, and is expanding its B2B market presence.

<table>
<tr><td align="center">**Strengths**</td><td align="center">**Challenges**</td></tr>
<tr><td>

- Install base
- Open-source heritage
- Marketing focus
- Digital Asset Management (DAM)
- Customer data platform (CDP)
- APIs

</td><td>

- Market awareness outside of North America

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Amplience

Amplience, headquartered in London, announced a management transition in January 2023 which now features a shared leadership team of CTO John Williams, CRO Rob Walter, and CMO David Rich. Amplience announced its $100M Series D raise in March 2022, which was led by Farview Equity Partners, Sixth Street, and Octopus. The Amplience offering now includes Dynamic Content, Content Hub for Digital Asset Management, Dynamic Media, a Content Delivery Network, and the Amplience Marketplace for integrations and extensions. The company also partners with Algolia for search and merchandising use cases. retail, branded manufacturers, and B2B commerce.

The Amplience Content Hub and Dynamic Media capabilities supplement the Dynamic Content headless CMS with full support for image and video management and delivery as part of the architecture, eliminating the need for a separate DAM. Amplience also features ease of use for Marketers, along with the under-the-hood connectivity that developers and Sis require.

In November 2022, Amplience announced an expanded focus with Systems Integrators, such as 64Labs, around prebuilt Amplience integration with the Salesforce Commerce Cloud and its Composable Storefront Starter Kit. Amplience also has Commerce partnerships with commercetools, BigCommerce, and SAP Hybris.

Amplience has a growing marketplace with partner plugins for Analytics, Commerce, Localization, Personalization, Search, and Workflow, Amplience is set apart by the combination of its market focus, CXP offering, and its ability to deliver any form of content, including video. Dynamic Content enables agile content planning, production, and delivery. Because Amplience can deliver a complete digital customer journey, from discovery to purchase, they are one to watch.

Strengths	**Challenges**
• Cloud offering	• Market awareness
• Ease of Use	
• DAM capabilities	
• eCommerce	
• Marketplace	
• Microservices and APIs	
• SI Partnerships	

Contentful

Contentful, led by CEO Steve Sloan, made a number of key executive appointments in 2022 as it continues to fast growth, powered in part by its $175M Series F funding round in 2021. Jason Holmes was named as President of Revenue and Field Operations, and Amy Kilpatrick as Chief Marketing Officer. Contentful offers a full CXP that focuses on ease of use to support content creators. It offers this along with a modern microservices-based content platform.

In October 2022, Contentful announced its Composable Content Platform, which features content orchestration, a new Content Studio for composition, and the Contentful App framework and ecosystem, which allows for unique user interfaces and the creation of new apps that leverage the Contentful App Marketplace.

In May 2023, Contentful launched new prebuilt connectors, including the Shopify Connector, the Contentful SAP Commerce Cloud Connector, and the Google Analytics 4 App. It also announced Contentful Collaborate, which allows teams to work together on projects, including a new Live Preview capability and personalization that leverages integration with Ninetails.

Finally, Contentful announced Scale, its new AI Content generator that allows for faster content creation and automated translation. Contentful offers an app marketplace that enables third-party apps to be pre-integrated with the platform. With its new capabilities and focus on customers, Contentful is well-positioned for the growing demand for CXPs.

Strengths	Challenges
• CXP	• Balancing multiple product SKUs
• APIs	
• Focus on content AI	
• Advanced caching	
• Growing partner apps	
• Mobile optimized	

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Contentstack

Contentstack, led by Co-Founder and CEO Neha Sampat, announced a new funding round in November 2022, of $80M lead by Georgian, Insight Partners and Illuminate Ventures. This brings total funding to $169 Million. Contentstack offers a CXP with a full composable headless platform that includes full hosting, low code automation and a growing partner marketplace. Contentstack helped to pioneer the shift to headless content experiences. Contentstack has a heritage in mobile apps, it offers SDKs for iOS, Android, JavaScript, Ruby, PHP Node.js and React Native.

In a significant move, in March 2023 Contentstack was one of the first CXP providers to announce support and integration of ChatGPT with the Contentstack platform. The new Contentstack Digital Assistant is in the process of being made available to customers. We expect more will follow this move.

In May 2023, Contentstack announced Contentstack Launch, which offers the ability to create and launch a Contentstack hosted site in just a few clicks—demonstrating the shift to low code implementations. Contentstack also announced a new Contentstack Academy for offering training and certification to its growing customer base and partner network.

Contentstack continues to expand globally and just added a new General Manager to its growing presence in India. Contentstack also announced a partnership with Deloitte, in which it will recommend Contentstack to its clients. With its funding round and focus on both product and growth, Contentstack has made a statement to the market with its Generative AI announcement.

Strengths	**Challenges**
• Content-neutral publishing approach • Ease-of-use • Low-code approach • iOS and Android SDKs • Growing partner ecosystem	• Awareness outside of North America and Europe

Optimizely

Optimizely continues to focus on Content Experience and Content Marketing. The firm is led by CEO Alex Atzberger, who announced a new CMO, Shafqat Islam, and Chief Sales Officer, Sebastian de Jong, in February 2023. Optimizely offers a full CXP platform that is segmented into three segments: Orchestrate, Experiment, and Monetize. It also offers a full Customer Data Platform based on its 2021 acquisition of Zaius.

Orchestrate is its core CMS and Content Marketing offering. Part of its heritage is from the Episerver days. It includes a full Digital Asset Management (DAM) offering and content recommendations. Monetize is all about commerce and is based on its 2019 acquisition of Insite Software. Experimentation offers enterprises the opportunity to experiment with features and run tests to help refine customer experiences.

In June 2023, Optimizely announced the Content Graph, which is powered by GraphQL. Optimizely Content Graph will allow enterprises to quickly repurpose content and offer a more highly personalized search experience. This is all in support of 'headless' dynamic experiences that have the goal of a better experience for users.

In November 2022, Optimizely announced that it was now offering its experience platform on the Microsoft Azure marketplace. Optimizely is built on Microsoft .NET 5/6, which means it will run natively on the Azure cloud.

Optimizely continues to partner with Google and others, such as Contentsquare, for digital experience analytics. With a refined set of product offerings and a new management team, Optimizely is well-positioned for the future.

Strengths	**Challenges**
- CXP Platform - eCommerce - AI capabilities - Customer Data Platform - Marketing automation	Balancing the old and new offerings from Episerver and Optimizely

Contenders

Automattic

Automattic, based in San Francisco and led by CEO Matt Mullenweg continues to have the largest install base of all CXP providers. This is based on its WordPress platform, which is offered both as Open Source and as a managed service, wordpress.com, and as a premium enterprise service WordPress VIP. WordPress is currently the number one provider of websites in the world. Automattic has over $900M in investments, and its latest round of $288M was in 2021 and led by Alta Park Capital and Blackrock.

WordPress VIP offers its robust CMS, built-in eCommerce, content analytics, and the ability to leverage the entire WordPress ecosystem of partner plug-ins. The 6.2 release of WordPress continues to focus on ease of use for editors. It features enhancements to its Block Editor and easier ways to manage menus.

The growth of WordPress VIP has attracted a growing list of agency partners, such as Cognizant and HCL, that do deployments. Managed Services such as WPEngine have allowed WordPress to be used by larger entities, given the overall ease of managing the service. With the continued push into medium and large enterprises, Automattic remains one of the providers to watch.

Strengths	Challenges
• Brand recognition	• Reconciling number of product offerings
• Install base	
• Ease of use	
• Content analytics	
• Growing Partner ecosystem	
• WordPress ecosystem	

Bloomreach

Bloomreach, led by CEO Raj Datta, continues to focus on its CXP with a focus on commerce and personalization. The company announced Nino Sarkis as CFO in May 2022. Its core offerings include content, its headless CMS, engagement for personalized marketing, and discovery for eCommerce search and merchandising. It also offers a Customer Data Platform based on its acquisition of Exponea in 2021.

The Bloomreach headless CXP, which is available on the Google Cloud Marketplace, makes it easy to design page and product layouts as well as to schedule campaigns. Bloomreach can automatically offer dynamic content experiences based on behavior.

The Bloomreach eCommerce platform enables a more customized product discovery experience. In June 2023, Bloomreach added new merchandising features, including product cards, editing that includes data, easier cloning rules and configuration across sites, and enabled the curation of product placement on pages. Bloomreach has also established partnerships with experience analytics provider Contentsquare.

Its Commerce partnerships include BigCommerce, Magento, and Shopify. Bloomreach has over 200 partners across three tiers (Silver, Gold, Platinum) for design and implementation services. With its continued focus on commerce and personalization, Bloomreach is well-suited for enterprises focusing on web storefronts and buying experiences.

Strengths	**Challenges**
- Ease-of-use - Install base - Personalization - Content analytics - CDP	Balancing focus on CXP and eCommerce

CoreMedia

CoreMedia is based in Hamburg, Germany, and Arlington, VA, and led by Managing Director and Co-Founder Soren Stamer. In May 2022, CoreMedia announced Barbara Eiger as CMO and Royce Smeets as its product and CTO in December 2022. CoreMedia offers its Smart Content Management, that at its core is its Digital Experience Platform that offers headless capabilities. It also offers Personalized Experiences via its content marketing offering.

In March 2023 CoreMedia announced a new integration with OpenAI that can be leveraged in the CoreMedia content cloud. New capabilities include extracting SEO keywords, text summarization, content and copy generation, and image generation.

With a strong focus on integration, CoreMedia's Hub architecture supports over 150 integrations. CoreMedia offers integrations with personalization platforms, including Salesforce Interaction Studio, Dynamic Yield, and Monetate. CoreMedia also supports integrations with major eCommerce providers, including Salesforce Commerce Cloud, Sap Commerce Cloud, HCL Commerce Cloud, commercetools, elasticpath, and Spryker Commerce OS.

CoreMedia focuses on Healthcare, Retail, and Travel & Leisure industries. Most of its success continues to be in the highly competitive retail markets that include luxury brands, financial services, media and entertainment, and telecommunications.

Strengths	Challenges
• Cloud native	• Market awareness in North America
• DAM capabilities	
• eCommerce integrations	
• Content analytics	
• Focus on Retail	

Crownpeak

Crownpeak based in Denver and London and led by CEO Jonah Pransky, continues to focus on content experience platforms. Crownpeak continues to offer its DXP to the market. It also leverages the install base of e-Spirit, which it acquired in 2021.

Crownpeak's Services include hybrid headless CMS, digital accessibility, personalization content-driven commerce privacy and content management, and tag monitoring and management. Crownpeak also can now deliver AI-based personalization via the FirstSpirit Intelligent Content Engine. Personalization can be based on clicks, subscriptions, or purchases. This enables AI-based product recommendations.

In October 2022, Crownpeak announced that it was acquiring Illumino, which offers digital accessibility capabilities that includes automated accessibility scanning. In December 2022, Crownpeak announced that it had acquired Attraqt to add product discovery capabilities to its portfolio.

In commerce, Crownpeak partners with IBM web sphere commerce, Salesforce Commerce Cloud and SAP Commerce Cloud. Crownpeak industry focus includes Financial Services, Manufacturing, Public Sector, and Retail.

Strengths	**Challenges**
• Cloud native	• Integrating growing number of acquisitions
• Multisite management	
• eCommerce integrations	
• AI based personalization and recommendations	

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Kentico

Kentico, led by CEO Dominik Pinter, continues to offer its experience platform. In February 2023, it added a new CFO, Lucas Pollack, and in June 2023, the company announced Petr Svihlik as VP of Engineering. Kentico Xperience is cloud-based and offers 3 editions: Business offers CMS and commerce tools, Enterprise ads, and digital marketing abilities.

Kentico Kontent features an easy-to-use user interface. It also allows for simultaneous editing of documents. Kentico Xperience focuses on the marketer with built-in marketing automation and features like dynamic routing and reusable content. Kentico partners with Microsoft and leverages Azure Text Sentiment analysis and offers content personalization via its partnership with Recombee AI.

In June 2023, Kentico announced new capabilities of its built-in DAM offering Kentico Media Library. New capabilities include responsive image display, broader support of media types, AI-based image recognition, advanced search, unused files that can be deleted, and workflow and access restrictions.

Kentico supports a growing number of partners and integrations. Integrations include Google (Looker Studio), Microsoft (Azure Cognitive Services and Dynamics 365), Salesforce, Recombee, Siteimprove, Zapier, Zoho, and more.

Strengths	**Challenges**
• Pivot to headless	• Dependence on partners for analytics
• DXP capabilities	
• Workflow and integration with business applications	
• Growing number of partnerships	
• Content analytics	

OpenText

OpenText, based in Ontario, Canada, and led by CEO Mark Barrenechea, has continued to focus on enhancing its core content offerings as well as continuing to offer the large number of content management brands it has acquired over the years. OpenText now offers the OpenText Content Cloud, The Business Network Cloud, the OpenText Experience Cloud, the Cybersecurity Cloud, and the OpenText Developer Cloud.

OpenText positions itself as the information company, and its core focus is enterprise content. For OpenText Experience Cloud, OpenText offers OpenText TeamSite for personalized experiences, OpenText Experience CDP, OpenText Media Management, its DAM offering, and OpenText Experience DXM, its overall platform. DXM offers Content Management, DAM, workflow, and personalization.

OpenText Digital Experiences is cloud-ready and offers adaptive content that can be designed by marketing teams for personalization. The total number of brands is now over 32, and due to the growth of its brands, it now has a senior executive to manage its brand portfolio. That said, the OpenText Experience Cloud is more of what enterprises want regarding Content Experience.

Strengths	Challenges
• Brand recognition • Install base • Social Media integration • Content analytics • Overall focus on content management	• Migrating from legacy offerings to its new Experience Cloud

Sitecore

Sitecore continues to round out its product offerings. CEO Steve Tzikakis, has expanded the management team, including a new CFO, industry veteran Peter David and a new Chief Customer Success Officer Lee Miles. Sitecore also continues to leverage its 2021 investment of $1.2 Billion, which was led by unnamed private investors.

Sitecore has reorganized its offerings to Content Cloud (XM), Commerce Cloud, and Engagement Cloud. While late to headless, it now offers Content Hub One, which it announced in October 2022, along with enhanced Search capabilities, XM Cloud, Content Hub Operations, and Content Hub DAM, which make up the Content Cloud. These new offerings were based on previous acquisitions of Fore51 (Commerce), Moosend (Marketing), and Reflektion (AI-powered Search).

The Engagement Cloud offers a Customer Data Platform (CDP), which was based on its Boxever acquisition in 2021, Personalization, Send, and their Connect tool. In April 2023, Sitecore announced new Cloud component capabilities that are part of its XM Cloud. The new capabilities allow brands to compose dynamic page components. It also announced Generative AI capabilities, which will be powered by the Microsoft Azure OpenAI Service.

Sitecore has a growing list of partners, including Systems Integrators, including Accenture, Avanade, Deloitte Digital, Dentsu, EPAM, Infosyste Publicis Groupe, and WPP. Its core technology partners continue to be Microsoft and Salesforce. With a new management team and a growing focus on dynamic experiences, Sitecore is well-positioned for the future.

Strengths	**Challenges**
• CXP Platform • Multisite experience • Analytics • Marketing automation • AI based personalization • JavaScript services	• Migrating legacy installations to new product and service offerings

Innovators

Brightspot

Brightspot, based in Reston, Virginia, announced that Raleigh McClayton has been named CEO. Founder David Gang will remain as President and Chief Customer Officer. Brightspot is a content experience platform provider that provides a suite of solutions that enable the construction of dynamic digital experiences. The core of its solution is the Brightspot CMS, which provides a platform for developing front-end enterprise applications.

Brightspot supports enterprises with an intuitive collaboration environment that allows users to define workflows to establish a custom publishing process for content, enabling a permission structure that allows users to track and reject editorial decisions. This workflow tracking is augmented by Brightspot Media Desk, which enables the contextual search of digital assets, automatic tagging of metadata, and other utilities that make the process of locating critical digital assets more streamlined and unified.

Brightspot GO contains a series of prepackaged digital experiences for specific out-of-the-box use cases ranging from enterprise Intranets to eCommerce storefronts. Brightspot also utilizes APIs to serve content to all necessary endpoints in a speedy and scalable way and equips enterprises with the tools to push quick updates to their digital experiences without requiring complex data modeling.

Brightspot announced a new partner program in 2022 to help accelerate customer deployments and overall service delivery. Some of the partners include Aitheras LLC, Bannockburn, Deveire, Digital Prism Advisors, eThinking, material, SNO, Thinkware, WayPath, and Wizeline. Brightspot use cases include developers, modular content, brand storytelling, digital newsrooms, digital-to-print publishing, global deployments, and video management.

Strengths	Challenges
• Brand recognition	• Awareness outside of North America
• Install base	
• Content management and scheduling	
• Integrations	
• Preconfigured experiences	

Aragon Research

Magnolia CMS

Magnolia, based in Basel, Switzerland, and led by CEO Tim Brown, announced in July 2022 that GENUI acquired a majority stake in Magnolia. As a result, GENUI is expected to make a significant investment in the firm, Magnolia offers both a headless CMS as well as a digital experience platform. The offerings now include its Digital Experience Platform, Headless CMS, Content Driven Commerce, Magnolia PaaS, and its new Headless Accelerator.

Magnolia offers pre-built templates called Microframeworks that include automation, analytics, commerce, DAM, and marketing. To augment its Digital Asset Management, Magnolia offers a complete set of creation and editing capabilities for text and images. It also offers automatic translation. Magnolia supports both short and stories (longform content).

Magnolia also offers an app marketplace that has several partner integrations with over 200 content partners, Magnolia can ensure that clients can get deployment support around the world. The industries it focuses on include Financial Services, Insurance, Media & Entertainment, Real Estate, and Travel and Tourism.

Strengths	Challenges
• Ease-of-use	• Market awareness in the Americas
• API-based approach	
• Short and long form content	
• eCommerce partnership	
• Strength in financial services	

Storyblok

Storyblok, based in Linz and led by CEO Dominik Angerer, has continued to grow, partially due to their $47M B round that was led by Mubadala Capital and HV Capital. Their platform offers a full Headless CMS, Digital Asset Management, all enabled by an easy-to-use visual editor.

Storyblok offers its self-hosted Community Edition, Self-Hosted Enterprise Edition, and a Cloud SaaS version for its primary offering. The dual approach of offering both developer-focused capabilities with an easy-to-use visual editor increases Storyblok's overall appeal.

Storyblok continues to build its partner integrations, which are at 30 and counting. For commerce, Storyblok integrates with BigCommerce, Commercetools, Shopify, Shopware, and Sylius. It has a growing API platform that includes Content Delivery, Management, and GraphQL.

Storyblok does support multiple device delivery types. Besides Web and Mobile, Storyblok supports IOT, including AR/VR headsets. It touts is ability to support easy localization, which is often the most expensive part of a global web presence.

Strengths	Challenges
• Content management	• Market awareness in North America
• Commitment to open source	
• Growing Marketplace	
• Mobile app support	
• Headless architecture	
• Ease of enabling localization	

Strapi

Strapi, based in Paris and led by Pierre Burgy, offers both an enterprise-grade CXP and an open-source version that has grown in popularity. In June 2022, it announced its $31M Series B round, led by Flex Capital, Index Ventures, and angel investors. This brings its total funding to $45M.

Strapi is a headless architecture with a heavy emphasis on APIs and integration. The updated Strapi Market place now has over 143 different plug-ins that enterprises can use. Some of these offer basic functionality, such as a Preview button. Others include integration into Google Maps. Strapi also allows enterprises to create their own plugins.

Leveraging its recent investments, in March 2023, Strapi announced its Strapi Cloud offering. This allows enterprises to deal directly with Strapi for hosting instead of its alternative hosting methods via Heroku, DigitalOcean App Platform, or Platform.sh.

Use cases that Strapi excels at include corporate websites, editorial sites, and mobile applications. Strapi focuses on Financial Services, Business and Tech Services, and Telco, Media, and Gaming.

<u>**Strengths**</u>	<u>**Challenges**</u>
• Content management	• Balancing focus on developers vs. marketers
• Commitment to open source	
• Growing Marketplace	
• Mobile app support	
• Headless architecture	

Specialists

Kaon

Kaon Interactive, based in Maynard, Massachusetts, and led by CEO Gavin Finn, focuses on developing interactive sales and marketing applications that simplify complex product and solution stories in a visually engaging way anywhere, anytime, to turn prospects into customers. Through its platform, Kaon empowers B2B organizations with immersive 3D digital experiences that engage and educate buyers, resulting in improved sales effectiveness and customer engagement.

Kaon's interactive applications include immersive storytelling, value calculators, 3D product tours, spatial configuration tools, persona-based messaging, AR, VR, and more to help companies articulate their competitive differentiation. In June 2023, Kaon announced the addition of an AI-based recommendation engine to its platform to amplify buyer personalization. With CEOs looking to digital as a way to transform their buying experiences and stay competitive, Kaon is one to watch.

Strengths	Challenges
• Immersive 3D experiences	• Market awareness
• Sales and Marketing product journeys	
• Mobile app customization	
• Ease-of-use	
• Device flexibility	

Aragon Advisory

- The battle cry to modernize websites is here, and enterprises should make plans to shift away from legacy tools.

- The age of AI is here, and with it, an imperative to improve search and generate answers leveraging Gen AI. Enterprises should ask providers for product roadmaps.

- Given the need for fast migration, enterprises should evaluate new designs vs. just porting an aging site and the associated content and look for integration partners who are up to the task.

Bottom Line

To support the demand for more personalized experiences, content experience platforms are becoming smarter through a combination of CDPs and Generative AI. Enterprises need to evaluate providers, including the ones mentioned in this globe, carefully. Investments in AI, rich media, dynamic delivery, and personalization are key things to understand. Experiences will become more two-way over the next three years in this fast-changing market.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We provide a rigorous analysis of each vendor using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Aragon Research Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness**: Market awareness of the firm and its product
- **Customer experience**: Feedback on the product, installs, upgrades, and overall satisfaction
- **Viability**: Financial viability of the provider as measured by financial statements

Aragon
Research

- **Pricing and Packaging**: Is the offering priced and packaged competitively?

- **Product**: The mix of features tied to the frequency and quality of releases and updates

- **R&D**: Investment in research and development as evidenced by overall architecture

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international,* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)

- **EMEA** (Europe, Middle East, and Africa)

- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide

- Time zone and location of support centers

- Support for languages

- References in respective hemispheres

- Data center locations

The Four Corners of the Globe

The Aragon Research Globe is segmented into four sectors, representing high and low on both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators,* or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and perform effectively against those strategies.

- **Contenders** have strong performance, but with more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of their strategy.

- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

The inclusion criteria for this Aragon Research Globe are:

- *Revenue:* A minimum of $4 million in primary revenue for enterprise content platform software, or $8 million in a related market (ECM, cloud content management, portal, or collaboration).

- *Shipping product:* Product must be announced and available.

- *Customer references:* Vendor must produce a minimum of three customer references in each region that the vendor is a participant.

Vendors Included:

- Storyblok

Vendors Excluded:

Notable vendors who excluded are listed here:

- Liferay
- Oracle
- SAP
- Squiz