WAVE REPORT

The Forrester Wave™: Digital Experience Platforms, Q4 2023

The 15 Providers That Matter Most And How They Stack Up

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By Joe Cicman with Linda Ivy-Rosser, Sara Sjoblom

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Summary

In our 24-criterion evaluation of digital experience platform (DXP) providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps tech leader professionals select the right one for their needs.

Additional resources are available in the online version of this report.

Vendors Choose Packaged Composability To Build For The Intelligent Century

The generative AI (genAI) breakthrough of late 2022 sent every vendor scrambling to pivot its investments toward what enterprises will need for the intelligent century. Today, they've all tapped into services like OpenAI to generate content. Few have an architecture ready to offer layers of domain-specific models for speaking in a proprietary brand voice. Fewer still have a beachhead of customer data plus use-case and product content to power the models.

Enterprises spent the past several years patching the DXP promise of "better together" by assembling their own platforms using parts from multiple vendors. Future fit organizations do so better than their peers. Since the previous Forrester Wave™ evaluation, it's become evident that DXPs exist, but they're built by enterprises, not bought from vendors.

A New Promise Of Applications Harmonized For GenAI

Now vendors offer a new promise: DXP plus genAI equals your brand voice at cloud scale across all your touchpoints. Data is core to the intelligent century. Your platform architecture must be assembled in a way that uses data for insights, learns from customer interactions, and evolves experiences over time. Vendors in this evaluation offer a portfolio of composable applications that you can buy one at a time (on your own time) and that work better together the more you buy from them. They now offer common capabilities as shared services of their underlying platform. You won't buy the underlying platform — vendors build their applications on top of their platforms. You and your partners get to tap into it. Cloud-native architecture accelerates the rate at which vendors build new applications on top of their platforms. But beware: Not all vendors are at the same stage of cloud maturity, nor are they at the same stage of maturing their applications to take advantage of their underlying platform.

As a result of these trends, digital experience platform customers should look for providers that:

- **Have a strategy for harnessing generative AI.** Practically overnight, many of the vendors in this evaluation released a "generate content" button — leveling the playing field. Look for providers that offer you a way to generate content in your proprietary brand voice, with your differentiated expertise, and informed by your customer data. Also look for providers that offer a credible vision (and incremental releases) of reimagined interactions, like a big fat prompt box on your home page for customers to start conversing, messaging conversations with rich media and

links, or marketplaces that propose a bill of materials with assembly instructions.

- **Built a platform to harmonize their applications (old and new).** It's no secret that vendors have a spotty history of attempts to unify their DX platforms. The best approach pays dividends by accelerating the vendor's ability to create and iterate new applications. Some have spent billions of dollars acquiring products and years trying to integrate them. Others started from scratch with a cloud-native foundation, then added capabilities organically and through partnerships. The most effective approach to date has at its core high-scale data, services shared across applications, and consistent security, scaling, and mechanisms for extension. You can observe this as a user interface based on a single design system, identical customer profiles available to all applications, and practitioner workflows that step between modules without you needing to log in to different modules.

- **Offer a framework for harmonizing third-party applications.** Delivering your distinct digital strategy will most likely drive you to select at least one best-in-class capability from the hottest new breakthrough startup. You may even develop your own special sauce to plug in. A composed DXP means you buy other parts from other vendors when you need them. This is what a composable DXP means — you're the composer. Leading vendors in this evaluation have an app framework that both you and your cool new partners can use to plug in and work harmoniously with everything else on the platform. Some will call this composability, some will call it orchestration, and some will call it integration. Whatever term your vendor uses, the framework should bind applications by APIs and events, connect them through good data, and allow them to evolve independently in a decoupled manner.

- **Orient around continuous optimization.** You don't know what your customers will respond to, nor what will be the most actionable cohorts for a particular campaign or product line. Experience experimentation capabilities enable you to find out. Leading vendors use content created by genAI and propensity models that conclude what is most likely to drive engagement. They orchestrate three of the four foundational elements of modern digital experiences to work together as the flywheel of optimization to understand the customer with data, create the experience with content, and tailor that experience to fit the context with marketing technology.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in The Digital Experience Platforms Landscape, Q2 2023.

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

Figure 1

Forrester Wave™: Digital Experience Platforms, Q4 2023

THE FORRESTER WAVE™
Digital Experience Platforms
Q4 2023
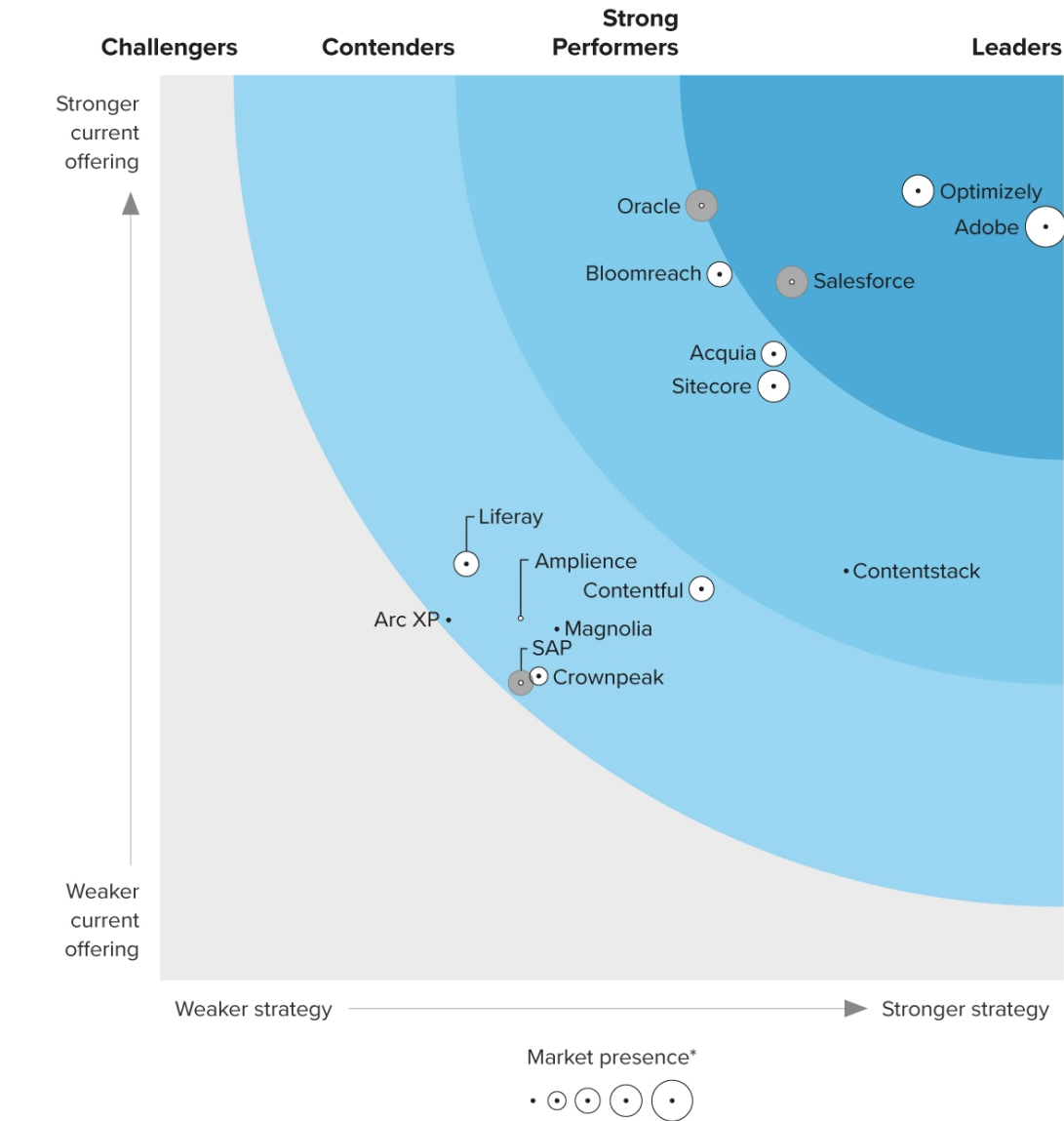
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Figure 2

Forrester Wave™: Digital Experience Platforms Scorecard, Q4 2023

	Forrester's weighting	Acquia	Adobe	Amplience*	Arc XP	Bloomreach	Contentful	Contentstack	Crownpeak
Current offering	50%	3.46	4.16	2.00	1.99	3.90	2.16	2.26	1.68
Practitioner tools	5%	5.00	5.00	1.00	3.00	3.00	3.00	3.00	3.00
Experience front end	5%	5.00	5.00	1.00	3.00	3.00	1.00	3.00	1.00
Search	2%	3.00	5.00	0.00	1.00	5.00	3.00	3.00	3.00
Experience experimentation	10%	3.00	5.00	0.00	1.00	3.00	0.00	0.00	3.00
Campaign management	2%	3.00	5.00	0.00	0.00	5.00	0.00	0.00	0.00
Digital commerce	2%	1.00	3.00	0.00	1.00	0.00	0.00	0.00	0.00
Content	5%	5.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Customer data	10%	3.00	5.00	0.00	1.00	5.00	0.00	0.00	1.00
Customer analytics	2%	3.00	5.00	0.00	0.00	5.00	0.00	0.00	1.00
Journey orchestration	2%	3.00	5.00	0.00	0.00	5.00	0.00	0.00	0.00
AI/ML	15%	3.00	5.00	3.00	0.00	5.00	3.00	3.00	3.00
Developer tools	10%	5.00	3.00	1.00	1.00	3.00	1.00	1.00	1.00
Extensibility and integration	15%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00
Application architecture	15%	3.00	3.00	5.00	5.00	5.00	5.00	5.00	1.00

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

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

	Forrester's weighting	Acquia	Adobe	Amplience*	Arc XP	Bloomreach	Contentful	Contentstack	Crownpeak
Strategy	50%	3.40	4.90	2.00	1.60	3.10	3.00	3.80	2.10
Vision	20%	3.00	5.00	1.00	1.00	3.00	3.00	5.00	3.00
Innovation	20%	3.00	5.00	1.00	1.00	3.00	3.00	5.00	3.00
Roadmap	15%	3.00	5.00	3.00	3.00	3.00	3.00	3.00	1.00
Partner ecosystem	20%	3.00	5.00	3.00	1.00	3.00	3.00	3.00	1.00
Adoption	10%	5.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Pricing flexibility and transparency	5%	3.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00
Community	5%	5.00	5.00	1.00	1.00	3.00	3.00	3.00	1.00
Supporting services and offerings	5%	5.00	5.00	1.00	1.00	3.00	3.00	3.00	1.00
Market presence	0%	3.00	5.00	1.00	1.00	2.50	3.00	1.00	2.00
Revenue	50%	3.00	5.00	1.00	1.00	3.00	3.00	1.00	2.00
Number of customers	50%	3.00	5.00	1.00	1.00	2.00	3.00	1.00	2.00

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

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	Forrester's weighting	Liferay	Magnolia	Optimizely	Oracle*	Salesforce*	SAP*	Sitecore
Current offering	50%	2.30	1.94	4.36	4.28	3.86	1.64	3.28
Practitioner tools	5%	3.00	3.00	5.00	3.00	5.00	1.00	3.00
Experience front end	5%	3.00	3.00	5.00	3.00	3.00	1.00	5.00
Search	2%	3.00	1.00	5.00	3.00	5.00	1.00	5.00
Experience experimentation	10%	1.00	1.00	5.00	5.00	5.00	1.00	3.00
Campaign management	2%	0.00	0.00	5.00	5.00	5.00	5.00	3.00
Digital commerce	2%	3.00	0.00	3.00	3.00	3.00	3.00	5.00
Content	5%	3.00	3.00	5.00	3.00	1.00	1.00	5.00
Customer data	10%	3.00	0.00	5.00	5.00	5.00	3.00	3.00
Customer analytics	2%	3.00	0.00	5.00	5.00	5.00	3.00	3.00
Journey orchestration	2%	1.00	1.00	5.00	3.00	5.00	5.00	3.00
AI/ML	15%	1.00	3.00	5.00	5.00	5.00	1.00	3.00
Developer tools	10%	5.00	3.00	5.00	5.00	3.00	3.00	3.00
Extensibility and integration	15%	3.00	3.00	3.00	3.00	3.00	1.00	3.00
Application architecture	15%	1.00	1.00	3.00	5.00	3.00	1.00	3.00

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

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	Forrester's weighting	Liferay	Magnolia	Optimizely	Oracle*	Salesforce*	SAP*	Sitecore
Strategy	50%	1.70	2.20	4.20	3.00	3.50	2.00	3.40
Vision	20%	1.00	3.00	5.00	3.00	3.00	1.00	3.00
Innovation	20%	1.00	1.00	5.00	3.00	3.00	1.00	3.00
Roadmap	15%	3.00	1.00	5.00	3.00	3.00	3.00	3.00
Partner ecosystem	20%	1.00	3.00	3.00	3.00	5.00	3.00	5.00
Adoption	10%	3.00	3.00	3.00	3.00	3.00	1.00	3.00
Pricing flexibility and transparency	5%	1.00	3.00	3.00	3.00	3.00	3.00	3.00
Community	5%	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Supporting services and offerings	5%	3.00	1.00	5.00	3.00	5.00	3.00	3.00
Market presence	0%	2.50	1.00	3.50	4.00	3.50	3.00	4.00
Revenue	50%	2.00	1.00	3.00	4.00	2.00	2.00	4.00
Number of customers	50%	3.00	1.00	4.00	4.00	5.00	4.00	4.00

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

Forrester evaluated the offerings listed below (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

Vendor	Product evaluated
Acquia	Acquia Open DXP
Adobe	Adobe Experience Cloud
Amplience	Amplience Digital Experience Platform
Arc XP	Arc XP Digital Experience Platform
Bloomreach	Bloomreach Experience Cloud
Contentful	Contentful Composable Content Platform
Contentstack	Contentstack
Crownpeak	Crowpeak Digital Experience Platform
Liferay	Liferay Digital Experience Platform (DXP)
Magnolia	Magnolia
Optimizely	Optimizely Digital Experience Platform
Oracle	Oracle Digital Experience for Communications
Salesforce	Salesforce Digital Experience Platform
SAP	SAP Customer Experience Platform
Sitecore	Sitecore Digital Experience Platform

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Vendor Profiles

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

Leaders

- **Adobe has strong customer data and analytics that power journeys at cloud scale.** Headquartered in San Jose, California, Adobe is known for powering some of the largest enterprise digital transformations. Adobe has a strong vision of empowering marketers with cloud-scale data that drives experience-driven growth. Its differentiated roadmap features the continued use of Workfront as the connective tissue across the applications in Experience Cloud to realize the vision

of the content supply chain. Adobe innovates by supporting use cases like the campaign planning record, which can use personalized content variations created by Sensei genAI, optimized with a new Content Performance application and a new Mix Modeler for optimized budget and planning activities.

Adobe has strength in most current-offering criteria, notably in AI/ML, customer data, and journey orchestration. Reference customers note that with great flexibility comes great responsibility, and they want Adobe to offer guardrails to keep them on the right track. In the past two years, Adobe has released three new applications built on top of Adobe Experience Platform (AEP), with two more coming by the end of 2023. All of its products built on AEP are designed to help brands thrive using first-party data in light of the already-underway cookiepocalypse. Adobe is best fit for large enterprises with a complex customer data strategy and that are engaging prospects and customers with content and interactive experiences across many industries.

- **Optimizely offers a portfolio of integrated SaaS apps built around a PaaS core.** Headquartered in New York City, Optimizely is known for its ambitious rollup and rebrand under the ownership of Insight Venture Partners. It has built a new foundation from the best parts of its acquisitions. Optimizely has strong supporting services and offerings that enable digital businesses to source multiple parts for their composed DXP that work straight out of the gate thanks to a (mutable) architectural opinion. Optimizely's roadmap for AI is expressed as initiatives to be delivered on monthly in a test-and-learn fashion. That means it will head in the direction that its customers determine. It focuses on content creation workflows, augmented by AI in strategic partnership with Azure and Google Cloud.

  Optimizely has strength in experience experimentation, AI/ML, and content. Clients praise the ability of the content marketing platform (formerly Welcome) to orchestrate work across applications. That allows Optimizely to build persona- and task-specific interfaces while allowing clients to rearrange those tasks to fit their particular content operations workflows. It's an ideal solution that balances the prioritizing of the practitioner experience while catering to the needs of a broad swath of businesses. Reference customers remark on the identity crisis that has emerged after the acquisitions, as not all clients are capturing the value of the platform investments. Optimizely is best fit for upper-midsized enterprises that are content-focused, experiment-driven, and looking for marketer productivity and developer flexibility that doesn't start from scratch.

- **Salesforce goes all in on an AI vision but leaves enterprise content to partners.** Headquartered in San Francisco, Salesforce is known as a (gentle) giant tech company with a human touch, democratizing all things to do with managing customer relationships. It's also known for pivoting the entire company to AI in 2023. Salesforce has a strong partner ecosystem that offers clients a wide range of industry expertise and best-in-class software from the AppExchange. Salesforce's full-company roadmap is squarely focused on genAI, allowing its customers to use their own troves of CRM data to deliver safe, proprietary brand experiences. The entire company is the platform. Its roadmap vision spans its entire portfolio, beyond just the Experience Cloud, unifying everything behind Slack as the UX. "AI is the UI," as the mantra goes.

  Salesforce has strength in AI/ML, campaign management, and practitioner tools. It continues to struggle with enterprise content support and has pivoted more intently to partners to shore up this gap in its portfolio. That doesn't seem to matter much, because content management systems (CMSes) are plentiful, but AI is hard. Salesforce Experience Cloud is best fit for existing Salesforce CRM customers that have bought into its full portfolio vision. Salesforce declined to participate in the full Forrester Wave evaluation process.

Strong Performers

- **Oracle has strong customer data and analytics, but its five-year roadmap is secretive.** Headquartered in Austin, Texas, Oracle is known for its bombastic presence in enterprise cloud applications, providing the full stack from cloud infrastructure to industry apps. It took a step backward in late 2022 as the news-making layoffs in its customer experience (CX) business revealed evidence of its struggles to gain traction in the market. Oracle's strategy is good across the board but not particularly differentiated in the DXP category right now. Its roadmap has been shared with clients and analysts under NDA as a statement of direction. That living document will serve as its North Star over the next five years as it repositions itself for differentiated growth in the intelligent century as one end-to-end, single-vendor application suite with DX capabilities.

  Oracle has strength in customer data, customer analytics, and developer tools. It has built a cloud-native platform of shared capabilities that it uses to build its individual applications and industry solutions. Oracle spent years refactoring its acquisitions into modular components that now provide features across its Fusion application suite. Those components use Oracle Cloud Infrastructure (OCI) and all

the underlying services that OCI provides. This gives Oracle a huge advantage for its business, while simultaneously offering its partners the opportunity to build IP to extend Oracle applications. Oracle's main weakness? Clients benefit most when they're Oracle shops, and that doesn't play well in a market that embraces a best-of-breed approach. Oracle is best fit for high-scale, high-complexity industry applications for engaging business customers. Oracle declined to participate in the full Forrester Wave evaluation process.

- **Bloomreach has strong search and journey orchestration but lacks core commerce.** Headquartered in Mountain View, California, Bloomreach is known for its singular focus on enterprise digital content and commerce experiences. It intentionally avoids investing in a commerce platform of its own, preferring instead to provide the experience layer to any commerce platform. That's because long ago most commerce platforms threw in the towel on world-class experience, handing over industry stewardship to players like Bloomreach. Bloomreach has a strong vision of a portfolio of MACH-certified applications connected through customer and product data that feeds a feature set beefed up by AI. On its roadmap, Bloomreach plans to use its trove of customer and product data to create an AI-powered interactive shopping assistant, named Clarity, to enable brands to provide much of the expertise that customers rely on in-store brand associates to provide today.

  Bloomreach has strength in journey orchestration, search, and AI/ML. Its acquisition and integration of Exponea positions it to engage shoppers across channels with highly relevant content and offers that lead to the buy button. Reference clients are delighted by a good blend of capabilities that work together to drive online revenue. They appreciate the ease of use and applaud the unified workflows that cohesively bind the products. Bloomreach is best fit for e-commerce sites with large catalogs.

- **Acquia treats marketers and devs as first-class citizens but lacks native commerce.** Headquartered in Boston, Acquia is still run by Dries Buytaert, the founder of the Drupal project who parlayed the open-source ethos into a full portfolio of digital experience applications for mid- to large-sized enterprises. Acquia has a strong community of agencies that build solutions with its expanding portfolio and with plugins to its apps. Acquia's roadmap includes a software-as-a-service (SaaS) version of Drupal with support for any flavor of JavaScript front end. It also plans more content creation tools powered by genAI — including a chat UX that will drive further integration across all the applications in its portfolio.

Acquia has strength in content, practitioner tools, and developer tools. It has no enterprise-class digital commerce, opting to rely exclusively on partners like commercetools and Shopify to plug in transactional capabilities. Fitting of the commercial branch of an open-source project, reference customers tell Forrester that Acquia's people make the difference for their clients, even more so than the technology. That includes the star power of its founder and CTO. References also tell Forrester they're hungry for more learning resources and a perspective on genAI. Acquia is best fit for regulated industries with massive volumes of content that need governance.

- **Sitecore has strong commerce and front-end as it pivots to composability.** Headquartered in San Francisco, Sitecore is known for acquiring a modern portfolio from Reflektion, Four51, and Boxever in 2021 to empower digital teams in the cloud era. But now that it can compete again, it faces powerhouse competition. To soothe the growing pains, Sitecore's leadership is heavily engaged in helping clients through their transition to the composable portfolio — particularly as clients add Sitecore's new products to its legacy Sitecore 10 footprint. Although the acquired technology is a stark contrast to the legacy Sitecore 10, the company mission remains intact. Same mission, new method. Sitecore has good innovation from its acquisitions, which are yielding "1 + 1 = 3" gains. Its bold four-stage roadmap sets a course for Sitecore Autopilot, powered by genAI, promising to run and optimize digital experiences with human oversight of business outcomes. You'll manage the ends; machines will manage the means.

  Sitecore has strength in digital commerce and experience front end. Its digital commerce capability is top-rated in this evaluation due to its ability to adapt to a wide variety of business models, from simple retail to franchise operations to B2B marketplaces. It has invested heavily to provide a wide variety of capabilities for building modern, component-oriented, decoupled front-end content apps. Reference customers indicate that Sitecore still appears to be in the early stages of integrating its portfolio and finding product-market fit. Composability is a pivot for Sitecore and its clients alike. Sitecore is best fit for financial services and industrial manufacturing firms with complex content and commerce experiences.

- **Contentstack has a strong vision of a composed platform but a small portfolio of parts.** Headquartered in Austin, Texas, Contentstack is known for being one of the three cofounders of The MACH Alliance. It has a strong vision of what "the new spine" of a composed digital experience platform needs to contain and what it should not contain. Its vision acknowledges that an enterprise's digital strategy will evolve over time, driving demand for new apps. Providing the "spine" means

that Contentstack retains its spot in your stack despite you churning digital appendages. Contentstack's roadmap features layered genAI for brand intelligence, a personalization engine, and a visual builder. That's a course far more ambitious than its humble start as a cloud-native, headless CMS.

Contentstack has strength in AI/ML and relatively good content support. It relies on partners to provide customer data, journey orchestration, and many other parts that make up an enterprise's DXP. Those parts plug into but don't compose the spine. Reference customers tell Forrester that Contentstack sometimes delivers updates too fast (imagine that!) and that its documentation isn't optimized for nontechnical users. References also told Forrester that they're seeking more prebuilt connectors. This can quickly become a slippery slope, however (e.g., give me freedom and prescription!). Contentstack is best fit for enterprises committed to architecting their DXP for their differentiated digital strategy.

Contenders

- **Contentful offers cloud content and extensibility but favors developers over marketers.** Headquartered in Berlin, Contentful is known as a popular cloud-native, headless content player. And it's built for builders; its marquee supports a variety of use cases, notably enterprise digital products. More than a few high-flying tech companies have Contentful managing the content for their cloud applications. Contentful's roadmap features a single content graph to unify disparate content sources behind one API. The goal is to enable marketers to compose pages in an upcoming no-code layout editor, regardless of where the content is managed. All that will be powered by new native personalization that uses multiple large language models (LLMs) to generate segment-specific variants.

  Contentful has good content support and AI/ML. It relies on partners to supply its customers with many other parts of an enterprise DXP — parts like digital commerce, campaign management, and customer analytics. Its robust application framework allows its partners to build connectors that blend side by side with the native interface used by marketing personas. Like with its other MACH Alliance compatriots, this allows Contentful to focus its investments on being world-class at a few things while letting others do the same. Authoring and editorial workflows need improvement, and reference customers confirm this. References describe Contentful as "a developer's dream," but they also want to see marketplace apps that require less (or no) development. Contentful is best fit for enterprises that build digital products.

- **Magnolia has a vision of composing but lacks a cloud-native architecture.**
  Headquartered in Basel, Switzerland, Magnolia is known for its long-held strategy of being the core of an enterprise's composed digital experience platform. Magnolia has a good systems integrator (SI) partner ecosystem that has built industry applications on its core for years, using its Connector Framework. Magnolia has weaker innovation compared to others in this evaluation. It remains focused on its mission of pragmatic, incremental advancements that play to its well-established client profile. Magnolia's roadmap will release genAI features for editors, like creating content variants for specific segments, but this is basic relative to others in this evaluation. Its AI strategy relies strictly on third-party services, shielding its customers from any risk of it betting on the wrong horse.

  Magnolia has good content support and extensibility and integration. Like other composable DXP vendors in this evaluation, it relies on partners to provide many other parts of an enterprise DXP, such as customer data, customer analytics, and digital commerce. It lags in more sophisticated capabilities like experience experimentation and journey orchestration, having no visual tooling to design flows with multichannel interactions. Magnolia has spent years gaining experience to make the "some assembly required" stance easier, more prescriptive, and more reliable. Reference customers appreciate that it goes the extra mile, but they report that Magnolia's interface is a bit old. Magnolia is best fit for conventional enterprises building content experiences across a variety of industries with a preference for platform as a service (PaaS).

- **Amplience has good content but is still early in its pivot to genAI for retail.**
  Headquartered in London, Amplience is known for its focus on enabling digital teams at consumer apparel brands. It has a good partner ecosystem, which it built out as part of the MACH Alliance, and which includes independent software vendor (ISV) and SI partners as well as ambassadors from enterprises that embrace the ethos of the cloud-native, compose-your-own platform. Amplience has weakness in vision and innovation; its new product strategy (announced earlier in 2023) has not yet delivered the full first year of what it promises. The new strategy pivots the company toward being oriented around genAI for optimal consumer shopping experiences. Amplience has a roadmap to build a generative content platform, with layers of foundation models for shopping that underpin models for specific categories (e.g., electronics, home goods, fashion), which then underpin a client's brand model. All this will be integrated into editing tools for creating discrete product descriptions and images to pages and even complete campaigns.

Amplience has good content and strong application architecture. It was built as a cloud-native, headless CMS with ambitions of orchestrating more and more elements of the complete digital experience. Amplience relies on partners to provide many other parts of an enterprise DXP. It is best fit for consumer product brands with flagship e-commerce sites. Amplience declined to participate in the full Forrester Wave evaluation process.

- **Liferay has good analytics and front end, but it's late with its cloud-native architecture.** Headquartered in Diamond Bar, California, Liferay is known for its long history as a Java portal server, and more recently for taking steps to embrace modern cloud application architecture. It has maintained its momentum even as it competes with more-modern peers. Liferay has a good community due to its long heritage in this space, its open-source edition, and its partner-first go-to-market approach. It has weakness in its vision, which lacks first-mover or fast-mover perspective. Liferay's roadmap focuses on adoption of its new SaaS extensibility model by providing a "solution concierge" to help partners build client projects under the new extensibility paradigm. The new cloud-centric extensibility lets it play in both PaaS and SaaS worlds, which expands its range of potential clients without shutting out its current client profile.

  Liferay has solid content and customer analytics. Its new design system decouples content from presentation. Clients can use the design system as is, or they can style and extend it to fit their brand. Liferay uses this design system to unify its newly rebundled applications. New all-in-one packaging allows customers to use what they need when they need it without going through additional procurement cycles. Liferay lags in experience experimentation, customer data, and AI/ML, which today provide basic capabilities for relatively simple use cases. Reference customers applaud the efficiencies that come from being in the cloud, but they also note that scaling isn't entirely solved under load when accessing large volumes of data. Liferay is best fit for midsized enterprises or divisions of large enterprises with a diverse set of use cases across B2C, B2B, and business-to-employee (B2E) looking for a single vendor to provide most of their digital capabilities.

- **Crownpeak has good commerce search in the cloud, but its AI is still compartmentalized.** Headquartered in Denver, Crownpeak is known for releasing the first SaaS CMS and, years later, for being on an acquisition spree. It has lost some momentum as it harmonizes those acquisitions. Refactoring acquired applications to use services from an underlying platform doesn't happen

overnight, and it's extremely rare to happen on day one. Crownpeak established a good track record by harmonizing its flagship CMS with its e-Spirit acquisition over the past two years. It has a solid vision of building a platform that provides shared capabilities to its current and soon-to-be-acquired applications. Crownpeak currently has weak supporting services and offerings, as it's still in the early chapters of its M&A playbook, with relatively few applications. Its roadmap puts significant emphasis on building a foundational layer of genAI that will uniformly serve all applications in its portfolio, but that's an aspiration we've heard from many others and doesn't go far enough to differentiate. Along the way, it will continue making acquisitions and harmonizing them with AI-powered features (driven by the team from Attraqt).

Crownpeak has good experience experimentation (white-labeled from Dynamic Yield) and search (from its Attraqt acquisition). It lags in customer data and customer analytics. Those capabilities currently exist in individual applications, not at the platform layer. Reference customers note that one site administration tool must still be run locally — and has issues connecting to the cloud — a remnant of e-Spirit. Crownpeak is best fit for quick time to value for business units of large enterprises that engage business customers in regulated industries.

- **SAP has a few good apps, but the jury's out on the fate of its content and commerce.** Headquartered in Walldorf, Germany, SAP is known for providing solutions for end-to-end workflows — from customer engagement to operations to fulfillment. It has lost momentum in this market as it struggles to both modernize and innovate. SAP has good supporting services and offerings that it continues to tactically integrate across its portfolio. But its innovation is weak; the vendor seemingly prefers to cross-sell to its current customer base than to refactor for new growth opportunities. SAP's roadmap targets its applications as parts of industry solutions that integrate with other SAP applications to automate complex business processes. It also plans new digital assistants for each application to help practitioners with their day-to-day tasks. Emarsys plans to support real-time personalization, support additional channels for social and conversations, and store and create content blocks for those channels. Content blocks in the engagement platform may be an attempt to refresh the content story for the broader suite.

  SAP has strength in journey orchestration and campaign management. It lags in practitioner tools. It also has weakness in experience front end, as well as content, which today are provided by its Commerce Cloud. SAP's capabilities are spread

across acquired applications, each of which is at a different stage of cloud maturity. It's still a mixed bag of technology, with harmonization not yet in sight. SAP is best fit for enterprises using S/4HANA to run end-to-end workflows between customer engagement and operations. SAP declined to participate in the full Forrester Wave evaluation process.

- **Arc XP has the content and architecture to help newsrooms scale, but it lacks AI.** Headquartered in Washington, DC, Arc XP is known for being spawned from The Washington Post under the ownership of Amazon founder Jeff Bezos. It has good pricing flexibility and transparency because it's been optimized for its narrow and very well-understood market — something other vendors in the space lack. It is laser-focused on the needs of news publishers and broadcasters in the era of vast and fast-moving news cycles. Arc XP's partner ecosystem lags due to its infancy and narrow industry focus. Its roadmap includes major improvements to its paywall capabilities, making those paywalls personalized and experiment-driven to give clients more options to bundle subscriptions across multiple sites.

  Arc XP has strong application architecture. It's built entirely on Amazon Web Services (AWS) architecture, taking advantage of everything a cloud-native application architecture can offer. It lags in customer data and digital commerce (which is narrowly built out for supporting paywalls). Arc XP defers to clients to use their own customer data platform for more advanced use cases. One reference customer was quite happy to migrate off a homegrown solution because it went from taking hours to publish to 2 minutes to publish. References also applaud having analytics on readership that helps them understand what content is resonating with what audiences. Arc XP is best fit for high-scale news publishers with large writing and editorial staffs.

Evaluation Overview

We grouped our evaluation criteria into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include experience experimentation, customer data, AI/ML, developer tools, extensibility and integration, and application architecture.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, innovation, roadmap, partner ecosystem, and adoption.

- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue and number of customers.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has:

- **An architectural approach to experience delivery.** With extensibility and interoperability being core to the platform, these vendors provide APIs and integration frameworks. This integration strategy is supported by a marketplace of third-party connectors, apps, and add-ons.

- **Software that enables the creation, orchestration, and optimization of digital experiences.** By providing a critical mass of well-integrated capabilities (first or third party) comprising content, customer data, transactions, analytics, and automation, these platforms allow practitioners to actively manage customer engagement across owned and third-party digital channels.

- **Enterprise relevance and a track record.** Customers and partners confirm that the vendors' products act as a core anchor tenant within the enterprise architecture, and there are enterprise-scale reference customers.

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

Supplemental Material

Online Resource

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

The Forrester Wave Methodology

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

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the

inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 15, 2023, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with our vendor review policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with our vendor participation policy and publish their positioning along with those of the participating vendors.

Integrity Policy

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

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Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA
Tel: +1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com