Now Tech: Web Content Management Systems, Q4 2018

Forrester's Overview Of 34 Web Content Management System Providers

by Mark Grannan
November 14, 2018

Why Read This Report

You can use a web content management system (web CMS) to improve content processes, maximize content reuse across multiple channels, and deliver relevant experiences at scale. But to access these benefits, you'll first have to select from a diverse set of vendors — vendors that vary by size, functionality, geography, and vertical market focus. Digital experience and strategy professionals should use Forrester's Now Tech report to understand the value they can expect from a web CMS provider and select vendors based on size and functionality.

Key Takeaways

Improve Digital Experiences And Operations With A Web CMS
Web CMS is a mature but evolving category. The best scenario today embraces breaking content back into smaller, dynamically composable elements, and web CMS offerings are enabling this across an increasingly complex set of digital touchpoints.

Select Vendors Based On Size And Functionality
Vendors in the web CMS space vary widely in revenue size. This healthy set of options across all levels comprises four categories: web CMS (independent and portfolio-based), experience CMS, and headless CMS.

Make Your Next CMS Your Last, One Way Or Another
Selecting a web CMS should be tempered because technology is often not the problem. When technology is a problem, sometimes a simpler solution can help streamline operations. Finally, digital experience (DX) architecture ambitions are shaping a new paradigm for CMS, which may avoid future replatforming pain.

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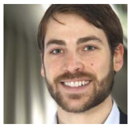

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November 14, 2018

Table Of Contents

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Improve Digital Experiences And Operations With A Web CMS

Web CMSes are a fixture in almost every enterprise's digital architecture. Why? Enabling developers and practitioners to manage branded web experiences — one of the most critical customer and partner touchpoints — is essential to scaling and maintaining digital engagement. However, in many customer and partner scenarios, social, mobile, email, and third-party marketplaces account for a dominant share of attention. Today, web CMSes' evolution to meet this new digital experience mandate signals the closure of a channel-specific mandate and the beginning of a new era. As a result, Forrester defines this final incarnation of a web CMS as:

> *A solution for creating content via authoring, development, and collaborative workflows; managing content metadata and code component libraries; and delivering contextual experiences for customer and partner engagement on websites and other digital touchpoints.*

While a myriad of adjacent technologies also allows enterprises to manage and deliver web experiences, modern web CMS offerings stand apart by bundling and delivering three core benefits to enterprise buyers. They can:

- **Enable better content and processes.** Content is (still) the soul of digital experiences.[1] Unfortunately, many organizations fail to invest in foundational content technologies, so the experience-centric solutions like a web CMS must carry the water for them.[2] Web CMSes are perpetually focused on enabling content creators, editors, and marketers to create content across touchpoints and languages and ultimately to intelligently reuse content based on insights.
- **Drive more digital touchpoints coherently.** A web CMS allows digital practitioners to deliver content and experiences into mobile apps, email campaigns, social channels, and internet-of-things experiences, and we're not sure what's coming next. Additionally, the web CMS often owns "the glass" and pulls content, data, and transactions into a unified customer experience. By orchestrating this push and pull, web CMSes play an outsized role in enterprise digital engagement and DX platform architectures.
- **Scale without the headaches.** Web CMSes met traditional scaling needs by replicating authoring or production environments as necessary. Scaling to match traffic demand and malicious attacks? Run your web CMS in the cloud.[3] Scaling across multiple brands, business units, and geographies? Web platform-as-a-service (PaaS) options alleviate much of this complexity. Scaling personalization? Web CMS automation and artificial intelligence/machine learning (AI/ML) technologies leverage cloud compute and web-scale data.

Select Vendors Based On Size And Functionality

We've based our analysis of the web CMS market on two factors: market presence and functionality.

Web CMS Market Presence Segments

We segmented the vendors in this market into three categories, based on revenue: large established players (more than $50 million in revenue), midsize players ($15 million to $50 million in revenue), and smaller players (less than $15 million in revenue) (see Figure 1). We did not include vendors that we estimated to have less than $1 million in revenue.

FIGURE 1 Now Tech Market Presence Segments: Web Content Management Systems, Q4 2018

NOW TECH

Web Content Management Systems

Q4 2018

LARGE >$50M in annual category revenue

- Acquia
- Adobe*
- Automattic
- Episerver
- SDL
- Sitecore*

MIDSIZE $15M to $50M in annual category revenue

- BloomReach
- Bridgeline Digital
- CoreMedia*
- Crownpeak*
- e-Spirit
- eZ Systems
- GX Software
- IBM (DXM)
- Kentico Software*
- Magnolia
- OpenText (TeamSite)*
- Oracle (Web Center Sites)*
- Perfect Sense Digital*
- Progress

SMALL <$15M in annual category revenue

- Amplience
- CloudCMS*
- Contentful
- ContentStack*
- Core dna
- DNN*
- dotCMS
- IBM (WCH)
- Jahia
- Oracle (Content and Experience Cloud)
- Percussion CMS*
- Prismic.io*
- Umbraco*
- Upland Software*

*Forrester estimate

Web CMS Functionality Segments

Forrester spoke with our expert analysts and interviewed external subject matter experts in our search for the most important web CMS attributes. While elements such as open source, partner go-to-market strategy, and price often shape enterprise investment priorities, we found that those elements are increasingly taking a back seat. Instead practitioner needs (e.g., developer versus marketer) and ease of integration among front-end components — the number-one DX software characteristic for the past three years — are the top factors when viewing this market.[4] Given the evolving spectrum of needs from enterprise buyers, we identified four web CMS segments in the market today:

› **Web CMS (independent).** For technology teams that need to enable nontechnical users (practitioners) to create and publish content while maintaining back-end controls, web-centric CMS solutions have fit the bill for more than a decade. Balancing web development with preexisting development skills (e.g., .NET and Java) and content and extensibility needs has led these independent solutions to try to satiate the needs of a very diverse audience. Many enterprise technology management organizations find that these solutions resonate with their needs, budget, and appetite for change.

› **Web CMS (portfolio-based).** Sharing a heritage with the independents, these web-centric CMS products have been acquired (sometimes multiple times) by larger vendors, or they've built out their own portfolio via acquisition or OEM. With adjacent product SKUs aimed at nontechnical digital professionals, (e.g., marketers, data scientists, and merchandisers), the portfolio focuses on easy cross-product adoption. Customers should ask: Do we already use an adjacent product? Could we bundle more purchases from this vendor down the road to save on cost and complexity and accelerate our DX practices?

› **Experience CMS.** Experience CMSes focus strongly on the creative and marketing aspects of experience management while potentially locking down or simply not supporting some aspects of back-end development (e.g., only offered as a full-service offering). These solutions have appealed to marketing and line-of-business buyers more so than traditional IT groups. A few vendors started out in an adjacent category such as landing page creation, but the bulk are web-centric CMS solutions vying to make claims here. Realistically, only a handful of web-centric solutions have embedded features like A/B testing, analytics, or digital asset management such that buyers can avoid having to buy standalone solutions.

› **Headless CMS.** Starting out as "'headless" or API-only, these solutions are almost exclusively cloud PaaS (subscription by volume traffic) and based on modern development technologies such as Node.js and JavaScript. However, they are expanding practitioner tooling to broaden appeal beyond developer-only scenarios and branding as API-first. Given the interest in this architecture to support emerging touchpoints or development paradigms, almost every vendor in this field will claim to be API-first. However, as full-stack solutions refactor, most should be viewed against a spectrum of API centricity.

Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, vertical market focus, and technology (see Figure 2, see Figure 3, and see Figure 4).

FIGURE 2 Now Tech Large Vendors: Web Content Management Systems, Q4 2018

LARGE >$50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Technology (code base, primary cloud platform, maximum SLA)
Acquia	Web CMS — portfolio	NA 77%; LATAM 1%; EMEA 15%; AP 7%	Manufacturing, media, public sector	PHP; Amazon Web Services; 99.95
Adobe	Web CMS — portfolio, experience CMS	NA 65%; LATAM 5%; EMEA 25%; AP 5%*	Finance, manufacturing, retail	Java; Amazon Web Services and Microsoft Azure; 99.99
Automattic	Experience CMS	NA 53%; LATAM 12%; EMEA 23%; AP 12%	Media, public sector, services*	PHP; Proprietary; 99.9
Episerver	Web CMS — portfolio, experience CMS	NA 38%; LATAM 8%; EMEA 53%; AP 1%	Retail, finance, public sector	.NET; Microsoft Azure; 99.9
SDL	Web CMS — portfolio	NA 43%; LATAM 18%; EMEA 29%; AP 10%	Manufacturing, services, finance	Java and .NET; Amazon Web Services; 99.9%
Sitecore	Web CMS — portfolio, experience CMS	NA 45%; LATAM 17%; EMEA 37%; AP 1%	Manufacturing, finance, public sector	.NET; Microsoft Azure; 99.5

Note: Vertical categorization uses seven primary categories: manufacturing, retail, services, media, utilities, finance, and public sector.

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 3 Now Tech Midsize Vendors: Web Content Management Systems, Q4 2018

MIDSIZE $15M to $50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Technology (code base, primary cloud platform, maximum SLA)
BloomReach	Web CMS — portfolio, experience CMS	NA 60%; LATAM 3%; EMEA 37%; AP 0%	Manufacturing, retail, finance	Java; Amazon Web Services; 99.9
Bridgeline Digital	Experience CMS	NA 85%; LATAM 0%; EMEA 15%; AP 0%	Manufacturing, retail, public sector	.NET; Amazon Web Services; 99.99
CoreMedia	Web CMS — independent, experience CMS	NA 41%; LATAM 0%; EMEA 59%; AP 0%	Retail, media, utilities	Java; Amazon Web Services; 99.95
Crownpeak	Experience CMS	NA 85%; LATAM 0%; EMEA 15%; AP 0%	Manufacturing, finance, public sector	.NET; Amazon Web Services; 99.99
e-Spirit	Web CMS — independent	NA 25%; LATAM 5%; EMEA 70%; AP 0%	Manufacturing, retail, finance	Java; Amazon Web Services; 99.5
eZ Systems	Web CMS — independent	NA 21%; LATAM 2%; EMEA 71%; AP 6%	Media, finance, public sector	PHP; Amazon Web Services and Microsoft Azure; 99.99
GX Software	Experience CMS	NA 2%; LATAM 0%; EMEA 98%; AP 0%	Finance, services, retail*	Java; Amazon Web Services; 99.8
IBM (DXM)	Web CMS — portfolio	NA 65%; LATAM 15%; EMEA 5%; AP 15%*	Retail, media, finance	Other; IBM Cloud; 99.9

Note: Vertical categorization uses seven primary categories: manufacturing, retail, services, media, utilities, finance, and public sector.

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 3 Now Tech Midsize Vendors: Web Content Management Systems, Q4 2018 (Cont.)

MIDSIZE $15M to $50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Technology (code base, primary cloud platform, maximum SLA)
Kentico Software	Web CMS — independent	NA 53%; LATAM 1%; EMEA 29%; AP 17%	Manufacturing, services, finance	.NET; Microsoft Azure; 99.95
Magnolia	Web CMS — independent	NA 22%; LATAM 4%; EMEA 72%; AP 2%	Retail, finance, public sector	Java; Amazon Web Services; 99.99
OpenText (TeamSite)	Web CMS — portfolio	NA 48%; LATAM 22%; EMEA 27%; AP 3%	Manufacturing, services, finance	Java; Amazon Web Services; 99.99
Oracle (Web Center Sites)	Web CMS — portfolio	NA 65%; LATAM 15%; EMEA 5%; AP 15%*	Finance, manufacturing, services*	Java; Oracle Cloud; vendor did not disclose
Perfect Sense Digital	Experience CMS	NA 60%; LATAM 15%; EMEA 20%; AP 5%*	Media, public sector, services*	Java; Amazon Web Services; vendor did not disclose
Progress	Web CMS — portfolio	NA 65%; LATAM 0%; EMEA 25%; AP 0%	Finance, public sector, manufacturing	.NET; Microsoft Azure; 99.99

Note: Vertical categorization uses seven primary categories: manufacturing, retail, services, media, utilities, finance, and public sector.

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 4 Now Tech Small Vendors: Web Content Management Systems, Q4 2018

SMALL <$15M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Technology (code base, primary cloud platform, maximum SLA)
Amplience	Experience CMS	NA 20%; LATAM 3%; EMEA 77%; AP 0%	Manufacturing, retail, services	Other; Amazon Web Services; 99.99
Cloud CMS	Headless CMS	NA 90%; LATAM 10%; EMEA 0%; AP 0%*	Manufacturing, retail, services*	Other; Amazon Web Services; vendor did not disclose
Contentful	Headless CMS	NA 46%; LATAM 7%; EMEA 46%; AP 1%	Retail, media, utilities	Other; Amazon Web Services; 99.9
ContentStack	Headless CMS	NA 50%; LATAM 5%; EMEA 40%; AP 5%	Retail, media, finance	Other; Amazon Web Services; 99.99
Core dna	Experience CMS	NA 30%; LATAM 0%; EMEA 10%; AP 60%	Manufacturing, retail, media	PHP; Proprietary; 99.995
DNN	Web CMS — independent	NA 90%; LATAM 10%; EMEA 0%; AP 0%*	Retail, services, manufacturing*	.NET; Microsoft Azure; vendor did not disclose
dotCMS	Web CMS — independent	NA 60%; LATAM 7%; EMEA 30%; AP 3%	Retail, finance, public sector	Java; Amazon Web Services; 99.95

Note: Vertical categorization uses seven primary categories: manufacturing, retail, services, media, utilities, finance, and public sector.

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 4 Now Tech Small Vendors: Web Content Management Systems, Q4 2018 (Cont.)

SMALL <$15M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Technology (code base, primary cloud platform, maximum SLA)
IBM (Watson Content Hub)	Headless CMS	NA 65%; LATAM 15%; EMEA 5%; AP 15%*	Retail, finance, public sector	Other; IBM Cloud; 99.9
Jahia	Web CMS — independent	NA 20%; LATAM 0%; EMEA 80%; AP 0%	Manufacturing, finance, public sector	Java; Microsoft Azure; 99.9
Oracle (Content and Experience Cloud)	Headless CMS	NA 65%; LATAM 15%; EMEA 5%; AP 15%*	Manufacturing, retail, services*	Other; Oracle Cloud; vendor did not disclose
Percussion CMS	Web CMS — independent	NA 90%; LATAM 10%; EMEA 0%; AP 0%*	Public sector, finance, services*	Java; Amazon Web Services; vendor did not disclose
Prismic.io	Headless CMS	NA 10%; LATAM 5%; EMEA 80%; AP 5%*	Manufacturing, retail, services*	Other; Amazon Web Services; 99.9
Umbraco	Web CMS — independent	NA 26%; LATAM 4%; EMEA 70%; AP 0%	Services, manufacturing, public sector	.NET; Microsoft Azure; 99.9
Upland Software	Web CMS — independent	NA 90%; LATAM 10%; EMEA 0%; AP 0%*	Finance, media, public sector*	Java; Amazon Web Services; vendor did not disclose

Note: Vertical categorization uses seven primary categories: manufacturing, retail, services, media, utilities, finance, and public sector.

*The vendor did not provide information for this cell; this is Forrester's estimate.

Recommendations

Make Your Next CMS Your Last, One Way Or Another

Every vendor in this field will continue to brand and sell ahead of the curve, but the best will have a track record of co-developing the solution with lighthouse customers and strategic partners and of meeting their road map commitments. As the vendors establish their road maps to meet emerging digital priorities, digital experience and strategy pros at current and would-be enterprise clients should ask key questions to find reasons to stay or change course:

› **Decide if your technology is really the problem.** As one director of IT architecture at a global pharmaceutical company told us, "Our biggest problem is probably not [the CMS], as we have huge governance challenges. Each region wants to use their own agency, and the agency will build it from scratch. Some of these experiences have so much render-blocking JavaScript that we can't load on mobile in less than 10 seconds." This director is building up his governance team to better educate his colleagues and incent global adoption.

› **Ask if a simpler flavor of web CMS can streamline web operations.** Oftentimes digital ambitions were set based upon a vision of personalized experiences, but when those visions fail to translate into reality, many enterprise organizations are left with complex, expensive shelfware. Digital leaders should ask themselves, "What is this vendor known for?" and "Are we using that capability to its full potential?" There is a strong possibility that you can either downshift to a lower-cost, less complex solution to streamline and accelerate your web operations or demand skills transfer within your vendor and/or service partner renewal.

› **Evaluate your vendor's road map versus its ability to transcend digital epochs.** We're approaching a tipping point over the next two years: Channel-centric technologies will become legacy technology that drags down digital transformation efforts rather than enables them. As your business' operational siloes come down, study the vendor's road map to see how this solution can serve teams in customer service, sales, and beyond. We believe the next era in digital experience architecture will require Agile content operations, and a limited number of web CMSes will make the pivot to this new Agile CMS mandate.[5]

Supplemental Material

Market Presence Methodology

We defined market presence in Figure 1 based on annual category revenue.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

Endnotes

1. See the Forrester report "Vendor Landscape: Web Content Management Systems, 2016."
2. See the Forrester report "The State Of DX 2018: Priorities Thwarted By Legacy Foundations."
3. See the Forrester report "Should Your Web Content Management System Run In The Cloud?"
4. See the Forrester report "The State Of DX 2018: Priorities Thwarted By Legacy Foundations."
5. See the upcoming Forrester report "Coming Soon: Agile Content Curation And Orchestration Will Redefine CMS."

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