Digital Experience Platform (DXP) Products PEAK Matrix® Assessment 2021

August 2021: Complimentary Abstract / Table of Contents

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Background of research

The world is becoming more digital as we speak, opening up multiple avenues for enterprises to tap in a customer's journey. This coupled with a rising digital native population that demands a seamless and innovative experience underpinned by emerging technologies is forcing enterprises to up their Digital Experience (DX) game. In this era, excelling at digital experiences is no longer a differentiator but a must-have capability for enterprises. Digital experience now forms the backbone to business continuity and has also become a key enabler for growth.

For enterprises to offer real-time comprehensive, hyper-personalized, and channel agnostic experiences, they need all the quintessential capabilities (content management, digital commerce and brand engagement) under one interoperable and integrated umbrella we call a Digital Experience Platform (DXP). In addition to this, given the importance of customer data to drive these experiences and the rising importance of first-party cookies, the definition of DXP is evolving to incorporate holistic data management capabilities in the form of a Customer Data Platform (CDP).

As the demand for DXP is increasing and the market is becoming more established, the next wave of innovation and advancement in the DXP will be driven by a composable, open, and API-first solution that has a strong community support behind it.

In this research, we present an assessment and profiles of DXP vendors that have been featured on the DXP products PEAK Matrix®. Each vendor profile provides a window into its key strengths and areas of improvements across parameters that include but are not limited to focus, platform capabilities, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading DXP vendors, client reference checks, and an ongoing analysis of the DXP market.

This report includes the profiles of the following 11 leading DXP vendors featured on the DXP PEAK Matrix:

- **Leaders:** Adobe, Acquia, HCL Software, and Sitecore
- **Major Contenders:** Liferay, Optimizely Oracle, Progress, and Salesforce
- **Aspirants:** Bloomreach and Pimcore

Scope of this report:

	Geography		DXP vendors		Product
	Global		11		Digital experience platform

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Overview and abbreviated summary of key messages

This report examines the global Digital Experience Platform (DXP) product landscape. It focuses on platform position, assessment of the platform's capabilities, and key strengths and areas of improvement of the platform

Some of the findings in this report, among others, are:
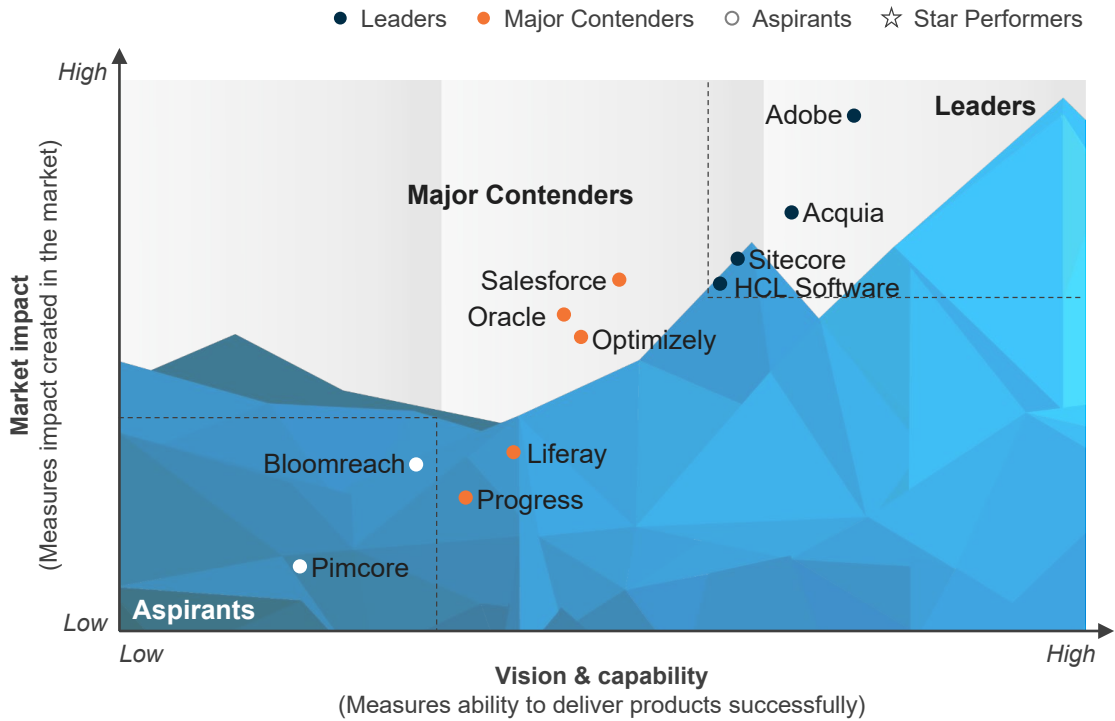
Platform capability

- DXP vendors can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Adobe, Acquia, HCL Software, and Sitecore are the current Leaders in the global DXP product market. However, several vendors are emerging as Major Contenders

Platform characteristics

- Leaders have showcased end-to-end fully-integrated DXP solutions with advanced capabilities across the three main modules of CMS, digital commence, and brand engagement to activate all the elements across a customer's journey. These players also have the highest brand recall and recognition among clients
- Leading players offer comprehensive data management and governance capabilities such as data migration, solutions to implement first-party cookies and an integrated CDP
- Few Major Contenders showcase an integrated end-to-end platform offering. The rest have developed specialization in one or two modules of a standard DXP and are currently ramping up their capabilities across the third module
- Major Contenders offer a relatively higher number of third-party integrations with complementary technology products of other vendors, making it easier for clients to integrate products of their choosing increasing the extendibility of the platform
- Aspirants have relatively nascent offerings around one or more modules of the DXP. In addition to this, they have a relatively smaller number of implementation and consulting partnerships that hinder their adoption on a truly global scale
- These players offer a competitive price point to the market and are known to have higher commercial flexibility that appeals to the clients

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This study offers a deep dive into key aspects of DXP products market; below are three charts to illustrate the depth of the report

Digital Experience Platform (DXP) Products PEAK Matrix® Assessment 2021[1,2]

Illustrative example

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers

Leaders

Adobe ●

Major Contenders

● Acquia

● Sitecore
HCL Software

Salesforce ●
Oracle ●
● Optimizely

● Liferay
Bloomreach ○
● Progress

Aspirants
○ Pimcore

Market impact
(Measures impact created in the market)

High — Low

Vision & capability
(Measures ability to deliver products successfully)

Low — High

1. Assessment for Adobe, Oracle, and Salesforce is based on partial inputs from the vendor and is based on Everest Group's estimates that leverage its proprietary data assets, vendor public disclosures, and interactions with DXP buyers
2. Assessment for Acquia, Bloomreach, Liferay, Optimizely, and Sitecore excludes vendor inputs on this particular study and is based on Everest Group's estimates

Source: Everest Group (2021)

Capability assessment

Illustrative example

Measure of capability: ◔ Low ● High

Platform vendor	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility & ease of deployment	Engagement and commercial model	Support	Overall
Service Provider 1										
Service Provider 2										
Service Provider 3										
Service Provider 4										
Service Provider 5										
Service Provider 6										
Service Provider 7										
Service Provider 8										

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility & ease of deployment	Engagement and commercial model	Support	Overall

Strengths
- Service Provider 1 is leveraging its Adobe Sensei capabilities to embed AI across its DXP modules such as content recommendations, RoI tracking for initiatives, and predictive account scoring and lead qualification
- IAs a part of its DXP offering, Adobe has launched a real-time Customer Data Platform (CDP) that operates on first party data

Areas of improvement
- Service Provider 2 suffers from limited capabilities and support for integration with complementary technology products of other vendors, which can act as a deterrent for clients looking for quick integration with their existing business applications
- Service Provider 3 operates at a premium pricing point in the market, which proves to be a high entrance plank for smaller enterprises

Research calendar
Digital services

Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2021 – Service Provider Compendium	December 2020
Artificial Intelligence (AI) Services – State of the Market Report 2021	Scale the AI Summit Through Democratization	January 2021
Digital Interactive Experience (IX) Services State of the Market Report 2021 – Moving from Persuasive to Purpose Driven Experiences	February 2021
Digital Services – Market Report 2021: Digital Transformation – Fostering value through rearchitecting Change Management	April 2021
Digital Experience Platform (DXP) Products PEAK Matrix® Assessment 2021	**August 2021**
Digital Experience Platform (DXP) Product PEAK Matrix® Assessment 2021 – Technology Vendor Compendium	Q3 2021
Blockchain Services PEAK Matrix® Assessment 2021	Q3 2021
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2021	Q4 2021

Thematic digital services reports

Experience Design: Rearchitecting the Trust Equation Through a Human-centered Design Approach	June 2020
Customer Data Platform Trailblazers: Top 15 Startups Redefining Hyper-personalization	March 2021
Operationalising Machine Learning at scale (MLOps)	April 2021
Federated Learning: Privacy by Design for Machine Learning	May 2021
Industry Report on Deconstructing AI governance for a scaled adoption	Q3 2021
Smart spaces solutions	Q3 2021
Trailblazers on commerce solutions	Q3 2021

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