

The Forrester Wave™: Digital Asset Management For Customer Experience, Q4 2019

The 14 Providers That Matter Most And How They Stack Up

by Nick Barber

November 20, 2019

Why Read This Report

In our 28-criterion evaluation of digital asset management (DAM) for customer experience providers, we identified the 14 most significant ones — Adobe, Aprimo, BrandMaker, Bynder, Canto, CELUM, Censhare, Digizuite, MediaBeacon, Northplains, Nuxeo, OpenText, Sitecore, and Widen — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery professionals select the right one for their needs.

Key Takeaways

Aprimo, Adobe, And OpenText Lead The Pack

Forrester's research uncovered a market in which Aprimo, Adobe, and OpenText are Leaders; Sitecore, Bynder, Widen, MediaBeacon, CELUM, and Nuxeo are Strong Performers; Censhare, BrandMaker, Digizuite, and Canto are Contenders; and Northplains is a Challenger.

Usability, Work In Progress, And Integrations Are Key Differentiators

As DAM gains broader adoption in more organizations, improved support for usability, work-in-progress assets, and enterprise integrations will dictate which providers will lead the pack. Vendors that provide superior capabilities in these areas position themselves to successfully deliver a differentiated experience to their customers and stand out in an increasingly crowded field.

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by [Nick Barber](#)
with [Allen Bonde](#), Sara Sjoblom, and Peter Harrison
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Related Research Documents

- [Eight Questions To Consider When Investing In Digital Asset Management](#)
- [Forrester Infographic: DAM Software Market Set To Top \\$1 Billion In 2019](#)
- [Now Tech: Digital Asset Management For Customer Experience, Q1 2019](#)



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Prioritize Usability And Ecosystem Fit When Buying Into DAM

Enterprises have reached a tipping point: They can no longer control and organize their vast libraries of content using ad hoc point solutions or simple tools like email and spreadsheets. It's just too complex: the number of people, the content mediums, the stages of approvals, the different renditions of content, and so on. With DAM expanding and permeating global organizations (alongside web content management systems [CMSes] and product information management [PIM]), it's important that it appeals to a variety of users regardless of their familiarity with enterprise software.¹ And it's critical that the technology plugs into other systems to support the upstream and downstream creation and delivery of omnichannel content and campaigns.

As a result of these trends, DAM customers should look for providers that:

- › **Deliver an elegant and intuitive user experience.** When an organization deploys DAM across the company, it's important that the technology is intuitive for nontechnical users in legal, sales, marketing, and other lines of business. One of the customer references we spoke with qualified the role of the DAM user interface: "It's good if you're used to working with enterprise software." That just won't cut it anymore in enterprises where consumer-grade expectations are the norm.²
- › **Engage content — and users — across the entire lifecycle.** DAM has grown beyond being a static asset repository. It now supports the upstream creative process for content, which includes capabilities like workflow, content review and approval, and integration with creative toolsets like Adobe Creative Cloud and Microsoft Office. This helps organizations break out of their silos, which 83% of digital retail pros cite as a challenge when executing a digital strategy.³ DAM tools also need tight integrations to enable downstream delivery of content to web CMSes (or eCommerce platforms) for consumers or to portals for partners and third-party channels.
- › **Build the foundation for atomic content and personalization.** When it comes to creating more personalized experiences, brands typically know a lot about their customers but little about their content.⁴ Leading DAM solutions can enrich content through both embedded, off-the-shelf AI for generic tagging and trainable machine learning for richer business-specific tags. Additionally, when creators break down content into smaller pieces — which we call atoms — they can combine or remix atoms to create new content or new variables of existing content. This atomization process helps drive content reuse and preps content to enable more personalized experiences.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in the [Now Tech: Digital Asset Management For Customer Experience, Q1 2019](#) Forrester report.

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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 Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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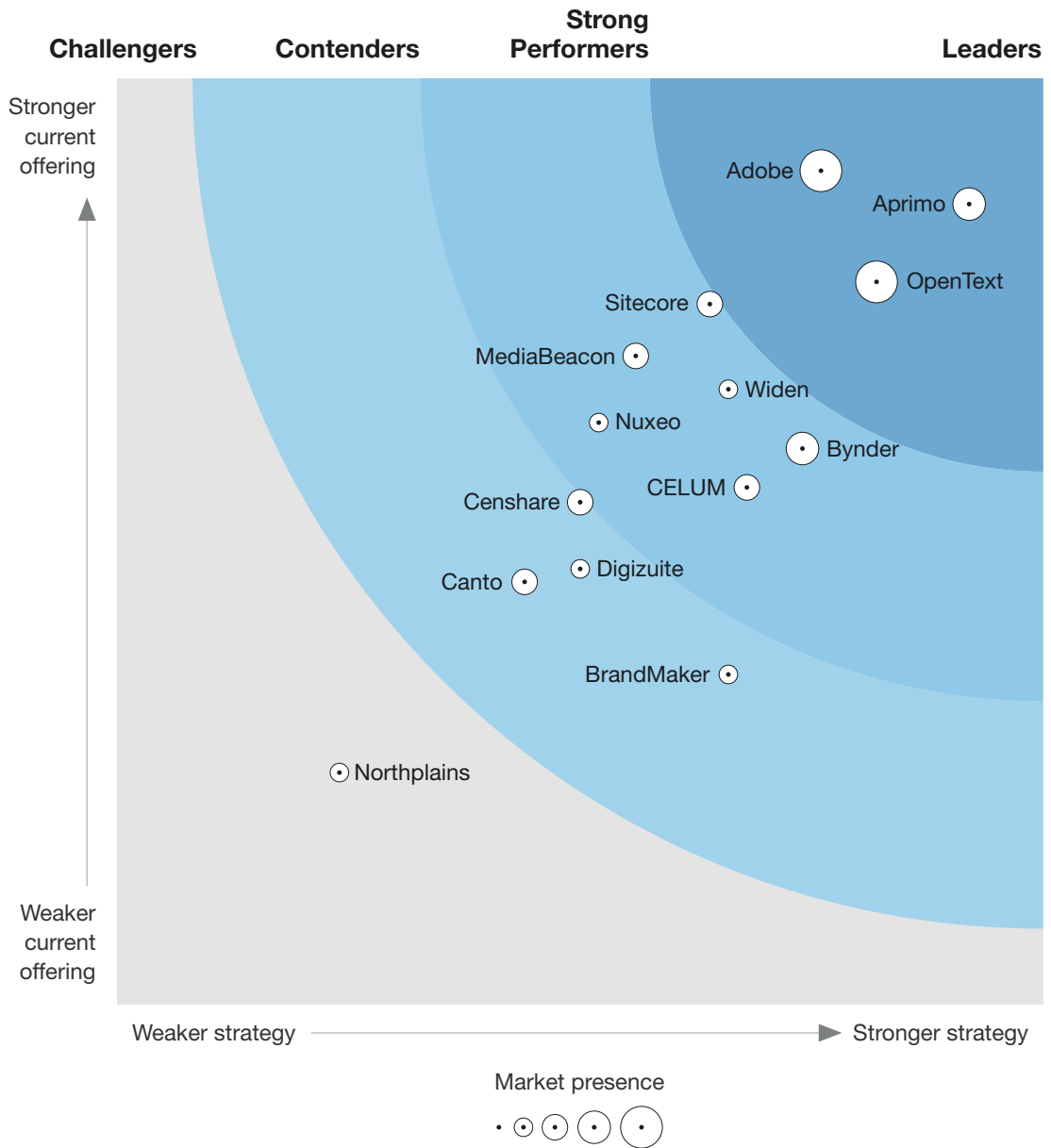
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FIGURE 1 Forrester Wave™: Digital Asset Management For Customer Experience, Q4 2019

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FIGURE 2 Forrester Wave™: Digital Asset Management For Customer Experience Scorecard, Q4 2019

	Forrester's weighting	Adobe	Aprimo	BrandMaker	Bynder	Canto	CELUM	Genshare
Current offering	50%	4.50	4.32	1.78	3.00	2.28	2.79	2.71
Library services	25%	4.60	4.80	2.10	2.30	2.10	3.00	3.60
Work-in-progress assets	15%	3.00	5.00	1.80	2.50	2.20	3.70	4.20
Video and emerging content support	15%	5.00	4.40	1.00	2.40	1.60	1.60	2.20
Marketing support	10%	5.00	4.20	3.00	2.40	3.80	2.40	3.00
Usability and user interface	20%	5.00	3.00	1.00	5.00	3.00	3.00	1.00
Enterprise platform integration	15%	4.30	4.60	2.20	3.00	1.35	2.70	2.30
Strategy	50%	3.80	4.60	3.30	3.70	2.20	3.40	2.50
Product vision	35%	3.00	5.00	3.00	3.00	1.00	3.00	3.00
Past performance	20%	5.00	5.00	1.00	5.00	1.00	3.00	3.00
Market approach	20%	5.00	3.00	5.00	3.00	3.00	5.00	1.00
Supporting products and services	10%	3.00	5.00	3.00	3.00	3.00	3.00	5.00
Delivery model	15%	3.00	5.00	5.00	5.00	5.00	3.00	1.00
Market presence	0%	5.00	4.00	2.00	3.75	2.50	2.25	3.00
Product revenue	75%	5.00	4.00	2.00	4.00	3.00	2.00	3.00
Average deal size	25%	5.00	4.00	2.00	3.00	1.00	3.00	3.00

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

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FIGURE 2 Forrester Wave™: Digital Asset Management For Customer Experience Scorecard, Q4 2019 (Cont.)

	Forrester's weighting	Digitizuite	MediaBeacon	Northplains	Nuxeo	OpenText	Sitecore	Widen
Current offering	50%	2.35	3.50	1.25	3.14	3.90	3.78	3.32
Library services	25%	2.00	3.20	1.80	4.00	5.00	3.60	2.70
Work-in-progress assets	15%	2.20	3.80	1.00	3.80	4.50	3.70	3.80
Video and emerging content support	15%	2.20	3.60	0.40	2.40	5.00	3.80	1.60
Marketing support	10%	3.00	1.80	2.40	2.80	4.40	3.00	3.80
Usability and user interface	20%	3.00	5.00	1.00	3.00	1.00	5.00	5.00
Enterprise platform integration	15%	1.90	2.70	1.00	2.20	3.90	3.00	3.00
Strategy	50%	2.50	2.80	1.20	2.60	4.10	3.20	3.30
Product vision	35%	3.00	3.00	1.00	3.00	5.00	3.00	3.00
Past performance	20%	1.00	3.00	1.00	3.00	3.00	3.00	3.00
Market approach	20%	3.00	3.00	1.00	1.00	5.00	3.00	3.00
Supporting products and services	10%	5.00	1.00	3.00	3.00	3.00	5.00	3.00
Delivery model	15%	1.00	3.00	1.00	3.00	3.00	3.00	5.00
Market presence	0%	2.00	3.25	1.25	1.75	5.00	2.75	2.00
Product revenue	75%	2.00	3.00	1.00	1.00	5.00	2.00	2.00
Average deal size	25%	2.00	4.00	2.00	4.00	5.00	5.00	2.00

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

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Vendor Offerings

Forrester included 14 vendors in this assessment: Adobe, Aprimo, BrandMaker, Bynder, Canto, CELUM, Censhare, Digizuite, MediaBeacon, Northplains, Nuxeo, OpenText, Sitecore, and Widen (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Adobe	Adobe Experience Manager Assets	6.5
Aprimo	Aprimo DAM	N/A
BrandMaker	BrandMaker DAM	6.5
Bynder	Bynder Flagship	N/A
Canto	Canto	5.4
CELUM	CELUM Content Collaboration Cloud	19.8
Censhare	Censhare	2019.2.x
Digizuite	Digizuite DAM	5.1.0
MediaBeacon	MediaBeacon	2019
Northplains	Northplains Telescope	9.4.17
Nuxeo	Nuxeo Platform	N/A
OpenText	OpenText Media Management	16
Sitecore	Sitecore Content Hub	3.2
Widen	Widen Collective	15

Vendor Profiles

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

Leaders

- › **Aprimo leads with strong integrations and superior work-in-progress support.** The Chicago-based marketing technology company acquired its DAM product in early 2017 to complement its marketing resource management (MRM) capabilities. Aprimo positions its offerings to cover the

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full content lifecycle: from support for upstream planning and creation to centralized storage and management to the handoff of assets to relevant downstream delivery technologies. It targets the consumer packaged goods (CPG), financial services, retail, and life sciences verticals, and it's expanding its geographic footprint to better serve parts of Europe, Latin America, and Australia.

Aprimo's strengths include strong support for core DAM capabilities like search, digital rights, and rendition management. Given its heritage in the MRM space, it has best-in-class support for work-in-progress assets as well. Reference customers offered resounding praise for the strength of Aprimo's implementation services. One reported that, "It was a very seamless process; they come onsite and get everything set up." Weaknesses include an on-par user interface, which client references criticized. Its portal offering — which we see as critical to driving broad DAM adoption, especially among business users — is also just on par with others in our evaluation. Aprimo is a good fit for companies in North America and Europe that need a strong core repository augmented by workflow capabilities to support the entire content lifecycle.

- › **Adobe leads with a broad ecosystem of services and supporting products.** Adobe, the San Jose, California-based software juggernaut, offers a suite of creative and experience products. Adobe Experience Manager Assets gets a boost from adjacent products in the vendor's digital experience stack, like its web CMS, analytics, and commerce platforms. Adobe targets large enterprise deployments across multiple consumer-facing verticals in North America, EMEA, and Asia Pacific. As it shifts to become cloud native, it's also turning an eye toward lucrative midmarket deals that require a lighter touch from professional services. Adobe has made a big bet on its smart capabilities like trainable AI and autocropping that help deal with content scale.

Adobe's strengths include solid support for core DAM capabilities under the library services umbrella, highly differentiated support for video and 3D content that's relevant for retailers and manufacturers, and a clean user interface that requires minimal training. Reference customers told us that the DAM solution can scale to support millions of assets, and Adobe's clients were some of the only ones we spoke with who used the product to house both work-in-progress and finalized assets. But while Adobe's AI-based capabilities show promise, in practice, they underwhelmed the users we interviewed. And even though Adobe owns the creative toolsets that most practitioners use, full integration between its Creative Cloud and DAM is still emerging. Adobe is a good fit for companies in verticals like retail, manufacturing, and travel that need strong enterprise platform integrations and extensive support for video and 3D content.

- › **OpenText leads with best-in-class library services and video capabilities.** OpenText is a Waterloo, Ontario-based software company that has been in the DAM space for two decades. Its Media Management product is part of the company's customer experience management portfolio and targets large enterprise deployments in manufacturing, media and entertainment, retail, and financial services. OpenText is one of the few vendors in this evaluation that still offers an on-premises deployment option as it refactors its service to focus more on cloud. Its deal sizes are among the largest in this evaluation, which speaks to both the functionality of the platform as well as the scale and cost of certain implementations.

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OpenText's strengths are in core library services and video capabilities, which are both best in class. It also offers strong marketing support in areas like portal creation and management capabilities. Customer references were pleased with the search functionality that allowed them to quickly comb through huge libraries. The company also stands out with video, where it goes beyond basic video management to include integration — aimed at marketers, not production houses — with video editing tools like Adobe Premiere. Product weaknesses include the user interface, which has come a long way but still isn't as modern as those of some competitors. And despite having large-scale deployments, some client references were only lukewarm on the product's scalability. OpenText is a good fit for large, global enterprises that are looking for strong core DAM capabilities in addition to superior video support.

Strong Performers

- › **Sitecore offers a highly scalable product with an intuitive user interface.** Sitecore is a San Francisco-based digital experience company known mostly for its web CMS. Since our last evaluation, it bought Belgium-based Stylelabs — a previous DAM Forrester Wave participant — and integrated the company into its portfolio as Sitecore Content Hub.⁵ Sitecore targets midmarket to enterprise deployments in the CPG, retail, and fashion verticals, mostly in the Americas, EMEA, and Japan. Sitecore also offers a suite of content management capabilities beyond DAM, including a web content management system, a content marketing platform, marketing resource management, and lightweight PIM capabilities.

Sitecore's strengths are in its scalability and user interface. Customer references had hundreds of thousands of assets deployed across multiple regions with no impact on availability. They also praised the "intuitiveness and consistency" of the user interface and noted that it was one of the platform's key selling points. Product weaknesses include on-par capabilities in areas like version control and campaign and collection management and limited adoption of enterprise integrations. Sitecore is a good fit for companies looking for a midmarket or enterprise DAM solution in verticals that would benefit from a product that is closely aligned with adjacent digital experience (DX) software apps.

- › **Bynder offers ease of use with global appeal for brand-forward companies.** Bynder is an Amsterdam-based DAM company founded in 2013. It acquired Webdam — a previous Forrester Wave participant — in 2018 and has leveraged it to target midmarket deals; the Flagship product that we included in this evaluation goes after enterprise deals. Bynder offers a native software-as-a-service (SaaS) DAM solution and is one of the only vendors in this evaluation that targets both small and medium-size business and full enterprise-scale deals. The company has a broad client base but also focuses on consumer and industrial brands, and fintech is another upcoming focus.

Bynder's strengths include an intuitive user interface, its enterprise platform integrations, and name recognition in the market. It's one of the most frequently mentioned companies by both competitors and Forrester clients, and if it bolstered some of its capabilities, it would likely be a

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player in more deals. Customer references noted the ease of use of the platform; one said that, “It takes 5 minutes to learn it.” Weaknesses include search, content localization, and support for work-in-progress assets. Some customer references were particularly frustrated with search, which didn’t perform well on large libraries of content, and were even further confused by AI metadata, which in some cases added inaccurate tags to assets. Bynder is a good fit for brand-forward companies that want an easy-to-use DAM solution that they can deploy quickly.

- › **Widen offers good workflow capabilities and solid usability with basic video support.** Widen is a Madison, Wisconsin-based technology company with a colorful history: It was founded in 1948 as a plate-engraving business. Its flagship software product, Widen Collective, is a standalone DAM solution, although the company is building a PIM product as well. It targets a range of verticals but sees the most traction in CPG, retail, and manufacturing — mostly in North America, but it’s building out its presence in Europe. Widen is one of the few vendors in this evaluation that is the sole implementer for the DAM solution. Beyond the implementation services, it offers unique features like “DAM-manager-as-a-service” to serve as a librarian in the absence of a full-time one at the client’s company.

Widen’s strengths include strong brand portal creation capabilities and solid overall platform usability. These are key capabilities that democratize the DAM solution beyond traditional power users or creatives and make it a more meaningful system for business users. Customer references noted that the UI was “great and intuitive.” The product’s weaknesses are in content localization, video, and 3D content, where it lags behind the rest of the market. It also offers just on-par enterprise integrations, which are key to cementing DAM at the center of any company’s DX ecosystem. Widen is a good fit for companies in North America that want a full-service provider but don’t need advanced video capabilities.

- › **MediaBeacon offers strong 3D content support and scalability for CPG brands.** MediaBeacon is a Minneapolis-based DAM firm; it’s part of the packaging company Esko, which rolls up to the global conglomerate Danaher. The company has gone through several rounds of leadership changes following its acquisition by Esko in 2015. MediaBeacon targets enterprises in the CPG, retail, and apparel verticals in North America and Europe that often use its suite of capabilities for packaging and merchandising.

MediaBeacon’s strengths include scalability, version control, and support for 3D assets. The 3D content support is particularly notable because MediaBeacon caters to CPG companies with 3D packshot models that the DAM solution can render. Customer references used the DAM in robust enterprise scenarios — hundreds of thousands to millions of assets and thousands of users — and noted good scalability based on the componentization of the different elements of the system. Product weaknesses are in security, marketing support, and MRM integration, which lag others we evaluated. Customer references also noted that they felt some pain around resources and support models from the company. MediaBeacon is a good fit for product companies that need a highly scalable DAM solution that supports 3D assets.

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- › **CELUM focuses on the European market with strong multilingual support.** CELUM is a Linz, Austria-based DAM firm founded in 1999 that's still led by its founder. The company targets enterprise and midmarket deals in manufacturing, retail, and CPG verticals, largely in EMEA, with specific focus on the multilingual DACH region (Germany, Austria, and Switzerland). CELUM is transitioning from a private cloud offering to a multitenant platform by 2021. The company has a professional services unit but relies mostly on partners for product implementations.

CELUM's strengths include its workflow capabilities, particularly around its content collaboration support, and it offers on-par enterprise integrations. Its customer references were some of the few who used the DAM solution for both work-in-progress and finalized assets, and they noted that the native workflow capabilities were solid. They also used the DAM solution integrated with PIM products and said that, for the most part, these implementations went well. Weaknesses include support for video capabilities and marketing support, specifically around content performance analytics and portal capability. CELUM is a good fit for DACH-region luxury goods or manufacturing companies that need, for example, support for work-in-progress assets but not heavy-duty video capabilities.

- › **Nuxeo offers highly flexible data models but weaker portals and integrations.** Nuxeo is a Brooklyn, New York-based technology company founded in 2000. In addition to DAM functionality, the company also sells its Content Platform to the enterprise content management market. The company is beginning to look beyond traditional marketing DAM use cases in favor of what it calls "product creative lifecycle management," which includes product design and packaging, for example. It targets enterprise buyers in the CPG, retail, and media and entertainment verticals, mainly in North America but with some activity in Europe.

Nuxeo's strengths include search, scalability, and metadata and taxonomy. Customer references said they're quite satisfied with search and scale against their large libraries of content. One customer reference noted that they appreciated the highly flexible data model, and that the platform felt like a "custom app in a low-code environment," which was a top selling point. Weaknesses include rendition management, portal, and PIM integration capabilities. One client noted some challenges working with Nuxeo's technical team on more complex problems, and they were also critical of the artificial intelligence capabilities for metadata extraction. Nuxeo is a good fit for media and product companies with large content libraries that need a flexible platform but not advanced portal capabilities.

Contenders

- › **Censhare offers strong search and scalability but has a steep learning curve.** Censhare is a Munich-based software company founded in 2001 that sells DAM alongside a complementary suite of web CMS and PIM. This is the first time the company has been evaluated in a DAM Forrester Wave. The company targets medium-size midmarket to medium-size enterprise deals with

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manufacturing, retail, and media companies, mainly in EMEA. The company saw the departure of both its CEO and CFO in 2018, and in 2019, German publisher DuMont took a controlling stake in the company.

Censhare's strengths include above-average core library services capabilities like search and scalability as well as good support for work-in-progress assets with strong workflow and approvals capabilities. Customer references validated search and scale capabilities with some of the largest content repositories in this evaluation. One client said that the search capabilities are among "the best we have for internal systems." Weaknesses include enterprise platform integrations for PIM and creative toolsets as well as below-par usability compared with other companies in this evaluation — references noted that the Java client interface has a "steep learning curve" and "isn't designed for lightweight users." Censhare is a good fit for European companies with large content libraries and sophisticated users who prioritize scale over ease of use.

- › **BrandMaker offers DAM alongside an MRM product for smaller deployments.** BrandMaker is a Karlsruhe, Germany-based marketing technology company founded in 2008 and still run by its two cofounders. This is the first time that the company has been evaluated in a DAM Forrester Wave. In addition to DAM, it also competes in the MRM space with another standalone product as a component of its marketing operations solution. The company focuses on marketing department and enterprise deals in manufacturing, retail, and financial services in Europe with a growing footprint in and emphasis on North America.

BrandMaker has on-par capabilities for metadata and taxonomy and marketing support. Customer references were not using the DAM solution in robust scenarios and reported fewer than 70,000 assets in their repositories. At this low level, they didn't note any issues with scalability. Customer references also said that price was one of the deciding factors for picking the product. Weaknesses include rendition management, video and emerging content support, and overall usability. References noted that the company could also better prioritize its development roadmap, offer better global support, and embrace an Agile methodology. BrandMaker is a good fit for companies that want an affordable MRM and DAM combination and don't have large asset libraries.

- › **Digizuite focuses on content performance but lags in scalability and integrations.** Digizuite is a Denmark-based DAM company founded in 2000. It focuses solely on the DAM market, and its target verticals include manufacturing, retail, and energy — spanning midsize to large enterprises. This is the first time that the company has been evaluated in a DAM Forrester Wave. It has historically focused on the EMEA market but is seeing traction in North America, and with its continued expansion plans, it recently hired a global CMO.

Digizuite's strengths include differentiated support for content performance analytics: The platform offers a connector to Microsoft Power BI, a top visualization and business intelligence tool. Customer references weren't using the DAM solution in robust scenarios (they had fewer than 50,000 assets) but did like the product's workflow capabilities. One client noted that the product has "a lot of custom workflows, and Digizuite sits with you and builds workflows for your

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processes.” Weaknesses include product scalability, version control, and enterprise platform integrations. Digizuite is a good fit for companies that don’t have large libraries of content but want reliable and customizable support for work-in-progress assets.

- › **Canto rallies behind a single DAM solution with solid portals, but integrations lag.** Canto is a San Francisco-based DAM company founded in 1990. In our last DAM Forrester Wave, we evaluated the vendor’s on-premises enterprise solution Cumulus, but it’s no longer actively selling that product. The company now rallies behind its SaaS product (formerly called Flight), now called Canto. It targets midmarket to small enterprise deals in the retail, manufacturing, and education spaces, mostly in North America with some traction in EMEA.

Canto’s strengths are solid portal capabilities that allow users to access content through both authenticated and nonauthenticated options. Portals are important because they enable companies to expose or curate a set of assets for business users, which increases adoption of the DAM solution. The platform also offers on-par usability. Customer references noted that the UI is “in between clunky and easy to use” and “moderately intuitive.” Weaknesses include subpar support for digital rights management, content localization, and enterprise platform integrations. It offers no capabilities for PIM and MRM and only has on-par integrations with web CMSes and creative toolsets. Canto is a good fit for companies in verticals like retail and nonprofits that need an easy way to curate and present assets to a wide range of users but don’t need a lot of bells and whistles.

Challengers

- › **Northplains was acquired by Aclate, which hasn’t (yet) invested in its capabilities.** Toronto-based Northplains was acquired by Aclate, an Austin, Texas-based holding company of software products, at the end of 2018 (Aclate also acquired some other marketing technology assets). In this Forrester Wave, we specifically evaluated the Telescope DAM product. Northplains is in a transition period as it works to serve and retain its current customers while brushing up its value proposition for net-new customers.

Telescope has on-par capabilities for search, scalability, and portal creation. Customer references were mixed: One said, “It’s very easy to find what you’re looking for”; another noted, “We’ve had some hiccups in the search indexing and found things get missed.” Customer references also said that the acquisition has given them cause for concern and noted that there’s now little transparency with the company when it comes to bug fixes and other updates. Weaknesses also include a lack of video delivery and 3D content capabilities and generally below-par usability and enterprise platform integrations. Companies with modest DAM needs, that don’t require enterprise integrations or video support, should consider Northplains.

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Evaluation Overview

We evaluated vendors against 28 criteria, which we grouped 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 products include library services, work-in-progress assets, video and emerging content support, marketing support, usability and user interface, and enterprise platform integrations.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, past performance, market approach, supporting products and services, and delivery model.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's product revenue and average deal size.

Vendor Inclusion Criteria

Forrester included 14 vendors in the assessment: Adobe, Aprimo, BrandMaker, Bynder, Canto, CELUM, Censhare, Digizuite, MediaBeacon, Northplains, Nuxeo, OpenText, Sitecore, and Widen. Each of these vendors has:

- › **Product revenue totaling at least \$10 million annually.** The vendors we included generate at least \$10 million in product revenue annually from DAM. We kept the revenue cutoff at this level to be able to feature some of the smaller players and their impact on the richness and growth of the DAM market.
- › **A best-of-breed product available for purchase.** The vendors we evaluated have a best-of-breed or standalone product actively available for purchase. We did not include vendors that have embedded, lightweight DAM functionality inside another solution in categories like product information management, content marketing platforms, or other systems.
- › **Enterprise market traction.** The vendors we evaluated actively pursue enterprise deals and have enterprise customers using their products. In this evaluation, we define an enterprise deployment as one where a single product is used across an entire company on a regional or global scale.
- › **Forrester client interest.** The vendors we evaluated are frequently mentioned in Forrester client inquiries, shortlists, consulting projects, and case studies. We see this demand-side interest as an important measure of market traction as well as the firms' brand-building efforts.

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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 Guide](#) to evaluate participating vendors.

The Forrester Wave™: Digital Asset Management For Customer Experience, Q4 2019

The 14 Providers That Matter Most And How They Stack Up

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 September 2019 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 [The Forrester Wave™ 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 [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor 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.

Endnotes

- ¹ See the Forrester report "[Forrester Infographic: DAM Software Market Set To Top \\$1 Billion In 2019.](#)"
- ² See the Forrester report "[The Future Of The Enterprise Software Industry.](#)"
- ³ Source: Forrester's Q1 2019 Global Top Retail Tech Survey.
- ⁴ See the Forrester report "[There's No Personalization Without Content Intelligence.](#)"
- ⁵ Source: Nick Barber and Mark Grannan, "Sitecore's Purchase Of Stylelabs Fits a Trend — But Is Not A Game Changer," Forrester Blogs, October 10, 2018 (<https://go.forrester.com/blogs/sitecore-buys-dam-vendor-stylelabs-not-a-game-changer/>).

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