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The Forrester Wave™: B2C Commerce Suites, Q2 2020

The 10 Providers That Matter Most And How They Stack Up

by Emily Pfeiffer and Joe Cicman

May 19, 2020 | Updated: May 20, 2020

Why Read This Report

In our 31-criterion evaluation of B2C commerce suites providers, we identified the 10 most significant ones — Adobe, BigCommerce, commercetools, Elastic Path Software, Episerver, Kibo Commerce, Oracle, Salesforce, SAP, and Sitecore — and researched, analyzed, and scored them. This report shows how each provider measures up and helps eBusiness and channel strategy professionals select the right one for their needs.

Key Takeaways

Adobe, Salesforce, And Commercetools Lead The Pack
Forrester's research uncovered a market in which Adobe, Salesforce, and commercetools are Leaders; SAP, BigCommerce, Kibo Commerce, and Oracle are Strong Performers; Episerver and Elastic Path Software are Contenders; and Sitecore is a Challenger.

Business User Experience Drives Key Differentiators
As monolithic technology becomes outdated and less appealing to merchants, the providers that lead the pack will demonstrate deep integrations with both owned and competitive solutions, as well as business user tooling that unifies controls across those solutions and streamlines workflows. Vendors that deliver this value position themselves to successfully help their clients grow revenue, deepen customer loyalty, and expand into new markets.

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The 10 Providers That Matter Most And How They Stack Up

by Emily Pfeiffer and Joe Cicman
with Fiona Swerdlow, Sara Sjoblom, Emma Huff, and Brandon Shaik

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Related Research Documents

Now Tech: B2C Commerce Suites, Q1 2020

Redefining The Three Commerce Technology Models For Today's Business Requirements

The Top Strategies For Replatforming Your Commerce Solution

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Merchants Seek Simplicity, Unity, Efficiency, And Choice

Digital commerce has seen considerable changes over the past few years. As headless vendors have gained more mainstream adoption, B2C merchants have sought solutions that do more to manage a rapidly evolving market. Legacy solutions have worked to keep pace by becoming more open, more deeply integrated, and less monolithic.

The 2018 Forrester Wave™ for this category called out the investments that vendors were making to improve upgrade cycles and move to cloud. Vendors have also made widespread acquisitions to build out complete suites. They are now making the next evolutionary strides as they open their platforms to tight integration of other functions of a commerce suite — even to solutions from competitive vendors. Some merchants still value the ability to find all functions under one banner. However, more are opting to assemble a suite of best-fit solutions tailored to their needs, regardless of vendor, enabling these merchants to seek out exactly what they need to efficiently manage their digital businesses.

As a result, B2C commerce suite customers (merchants) should look for commerce solution providers that:

- **Offer prebuilt, deep integrations.** More providers today offer proprietary app stores. However, the actual implementation of these add-ons can require everything from a few plug-and-play configuration clicks to a major developer-dependent implementation project. Look for ease of integration, meaning that: 1) the integrated solution is administrable within common tooling, and 2) changes are applied in real time and do not require batch processing or manual refreshes to take effect.
- **Provide relevant, industry-leading options — first- and third-party.** Merchants expect to choose the best-fit solution for their particular needs in every critical function of a commerce suite, such as order management system (OMS), digital asset management (DAM), and product information management (PIM), as well as the adjacent functions (like personalization and specialized marketing tools). They don't want to be limited to — or forced to customize — a provider's first-party offering or the third-party options with which their provider has partnered. Merchants will combine solutions from varied, competing providers — a trend that will accelerate as more merchants transition toward microservice architecture.
- **Have built or moved to a cloud, SaaS, microservice-based offering.** It is no surprise that reference customers told us they are dissatisfied with resource-heavy upgrades. Frequent, painless upgrades via software-as-a-service (SaaS) are a meaningful differentiator in this space. Continuous deployment models have become more widespread, and some providers offer truly versionless platforms. The once-common quarterly (or even yearly) major upgrades cannot keep up with rapidly evolving merchant and end customer expectations and needs. In addition, customers should look for the ability to deploy portions of a platform without deploying an entire monolithic suite, as well as other signs of modern delivery models, including zero-downtime upgrades and websites that automatically scale during high demand.

› **Prioritize the business user experience.** Business leaders tell us that they're relying on technology to improve their efficiency. Vendors are responding by simplifying workflows for business users and administrators. The best vendors continually improve users' experience without major upgrades or disruption to muscle memory of learned processes. Some features have become commoditized, such as retail promotions, for which most providers offer strong functionality. Now merchants will look for the game-changing providers that amplify their deep integrations and join administration of first- and third-party tools — all within a single, unified experience for ultimate efficiency.

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 our reports, "Now Tech: B2C Commerce Suites, Q1 2020" and "Now Tech: B2B Commerce Suites, Q1 2020."

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.

FIGURE 1 Forrester Wave™: B2C Commerce Suites, Q2 2020

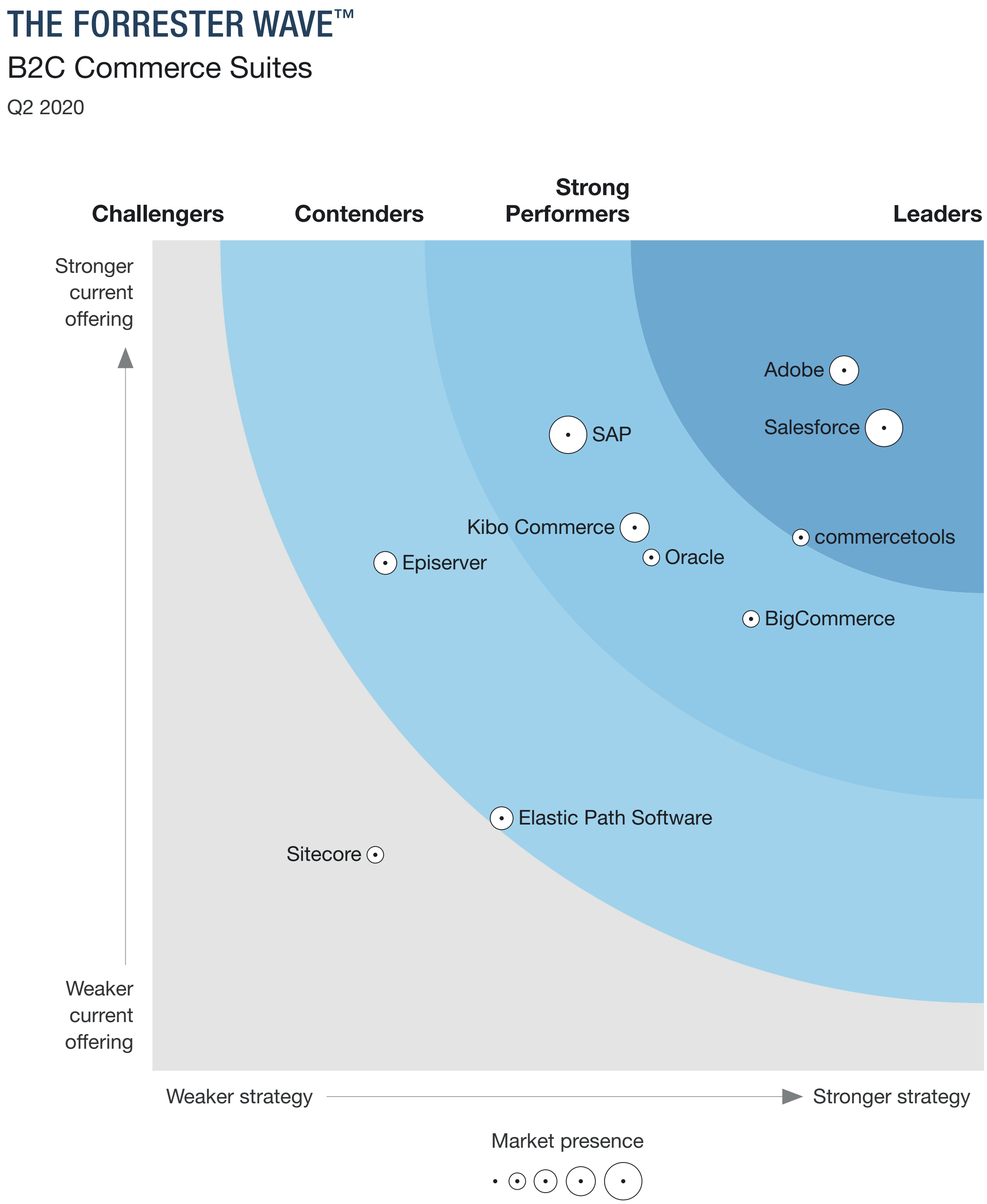

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FIGURE 2 Forrester Wave™: B2C Commerce Suites Scorecard, Q2, 2020

	Forrester's weighting	Adobe	BigCommerce	commercetools	Elastic Path Software	Episerver	Kibo Commerce	Oracle	Salesforce	SAP	Sitecore
Current offering	50%	4.22	2.72	3.21	1.52	3.06	3.27	3.09	3.87	3.84	1.30
Sales channel support	10%	5.00	3.60	2.20	1.00	3.20	3.20	1.60	4.40	3.60	1.60
Personalization	10%	5.00	3.60	3.00	1.00	3.00	3.60	4.40	4.40	4.40	1.00
Business intelligence and analytics	5%	3.00	3.00	1.00	1.00	3.00	3.00	3.00	3.00	3.00	1.00
AI and machine learning	5%	3.00	1.00	3.00	1.00	5.00	5.00	3.00	5.00	3.00	1.00
Commerce suite	15%	4.20	2.60	3.40	1.20	3.00	2.60	3.00	3.40	4.20	1.80
Commerce management	30%	4.30	1.70	3.60	1.80	2.80	3.90	3.30	3.10	4.20	1.40
Platform	25%	4.00	3.60	3.60	2.00	3.00	2.50	3.00	4.60	3.40	1.00
Strategy	50%	4.16	3.60	3.90	2.10	1.40	2.90	3.00	4.40	2.50	1.34
Product vision and roadmap	30%	5.00	3.00	5.00	3.00	1.00	3.00	3.00	5.00	3.00	1.00
Delivery model	30%	3.00	5.00	5.00	1.00	1.00	3.00	3.00	3.00	1.00	1.00
Supporting services	20%	3.80	3.00	3.00	3.00	1.00	3.00	3.00	5.00	3.00	2.20
Delivery and extensibility ecosystem	20%	5.00	3.00	1.50	1.50	3.00	2.50	3.00	5.00	3.50	1.50
Market presence	0%	4.00	1.75	1.25	2.75	2.50	3.50	1.75	4.50	5.00	1.75
Customers and customer acquisition	50%	4.00	1.00	1.00	3.00	3.00	4.00	1.00	5.00	5.00	2.00
Total gross merchandise value (GMV)	25%	4.00	1.00	1.00	3.00	1.00	3.00	1.00	3.00	5.00	1.00
Product revenue	25%	4.00	4.00	2.00	2.00	3.00	3.00	4.00	5.00	5.00	2.00

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

Vendor Offerings

Forrester included 10 vendors in this assessment: Adobe, BigCommerce, commercetools, Elastic Path Software, Episerver, Kibo Commerce, Oracle, Salesforce, SAP, and Sitecore (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Adobe	Magento Commerce, Magento Order Management, Magento Business Intelligence, Adobe Analytics, Adobe Target	2.3.4
BigCommerce	BigCommerce Platform	N/A
commercetools	commercetools B2C Platform	N/A
Elastic Path Software	Elastic Path Commerce Cloud	7.6
Episerver	Episerver Commerce Cloud	N/A
Kibo Commerce	Kibo Personalized Commerce Cloud	N/A
Oracle	Oracle CX Commerce	19.5.8
Salesforce	Salesforce B2C Commerce	N/A
SAP	SAP Commerce Cloud	1905
Sitecore	Sitecore Experience Commerce (XC)	9.2

Vendor Profiles

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

Leaders

› **Adobe leads with flexibility, supported by a strong global partner ecosystem.** San Jose, California-based Adobe offers Magento Commerce as both on-premise and single-tenant hosted solutions. The latter, released in late 2017, scales and provides guardrails that simplify upgradeability — demonstrating a successful cloud migration of the solution. Magento Commerce has an above-par, large, loyal, and highly capable delivery ecosystem that Adobe engineering is harnessing to increase its development velocity. The PWA Studio is positioned to lower the cost and complexity of adopting Progressive Web App experiences. Adobe's go-to-market (GTM) is focused on selling both to Adobe's enterprise client base and the midmarket that is Magento's heritage. Adobe is well positioned for broad reach with the combined forces of its sales teams and partner ecosystem.

The solution shines in its simple business user tooling to support critical functions like promotions and personalization. It is above par in harder-to-find functionality like subscription billing and is strong in fundamentals like order management. Adobe is actively marrying its renowned creativity tools with Magento Commerce, which creates a unique benefit to digital business users. Customers' partnerships with Magento have remained positive despite the transition, but they would appreciate some of the more personal touches of pre-acquisition service and events. Customers would like more training on and integration with the full Adobe suite to further take advantage of the greater offering. Adobe is best for brand-centric companies with rapidly evolving business models that differentiate on experience.

› **Salesforce Commerce Cloud is strong on functionality, but integrations are complex.** San Francisco-based Salesforce is a powerhouse for end-to-end customer engagement solutions centered around its CRM. In the past four years, it acquired separate B2B (Cloud Craze) and B2C (Demandware) commerce platforms. Both solutions now are part of the Salesforce Commerce Cloud but remain two distinct products. Salesforce is above par in its approach to the market, setting strategies that speak to customer needs and delivering (as promised) with reliable technical and support resources. Salesforce should now bring its B2C Commerce Cloud solution more in line with the greater Salesforce model, including unifying plug-ins into the AppExchange and letting classic Salesforce CRM strengths shine through, like powerful, customizable reporting.

  Salesforce B2C Commerce leads in its support for retailers and brands selling into multiple digital channels. Its personalization and automation are ahead of the curve, providing options for a relevant customer experience across touchpoints and local markets. It is below par in product and service configuration and has some work to do on multiple digital storefronts. Customers told us they appreciate the support and educational resources that Salesforce offers but would welcome more options for simplified integration of other suite components. Salesforce B2C Commerce is a best fit for brands looking for a personalized front-end experience.

› **Commercetools is new-school commerce tech, but only for the digitally mature.** In Q4 2019, Berlin-based commercetools was spun out from its parent, REWE, and acquired by Insight Partners in a move to boost growth for this truly cloud-native vendor. It offers cloud-native eCommerce APIs for large enterprises as an alternative to a custom build. First launched in 2013, commercetools was built from the ground up to provide developer-friendly APIs backed by cloud-native microservices in a multitenant architecture. This setup gives it the distinct advantage of being versionless and highly elastic at unprecedented cost-efficiency. Its product strategy and roadmap are above par compared with others in this evaluation. It gives its customers a commerce platform for building visionary commerce experiences at a fraction of the cost and time it would take to build in-house.

The vendor delivers above-par platform architecture and promotions but lags in business intelligence and workflow. This solution intentionally avoids investment in areas like workflow, instead deferring to a client's enterprise business process management system. This means commercetools isn't right for clients who need an all-in-one packaged offering. Customers told us they like not having scaling restrictions and not being on an upgrade cycle but would welcome improvements in the availability of out-of-the-box integrations. Commercetools is best for digitally advanced companies with an API-first approach to digital and a strong, modern, agile developer culture.

Strong Performers

- **SAP innovates around core eCommerce, but upgrades are behind the times.** Germany-based SAP released its Commerce Cloud on Public Cloud (Azure) in June 2018 with enhanced DevOps tooling to simplify technical implementation. It has surrounded the core with a new CMS, a serverless and microservices extension service, a personalization engine, and a chatbot. In the midst of a multiyear modernization of its Hybris asset, SAP is making incremental strides by building around that core to integrate with the broader SAP Customer Experience suite. SAP is building out this suite to offer a portfolio of engagement technologies to its large enterprise ERP clients across multiple verticals. Overall, SAP's product vision and roadmap are on par with others in this evaluation. SAP needs to continue to make strategic investments in its underlying platform architecture so that clients can easily stay on current versions and consume new innovation.

  SAP delivers above-par PIM, DAM, and OMS capabilities but is on par in platform integration. Customers told us they credit SAP with improved client relationships but would welcome deeper integration and prebuilt connectors to other SAP Customer Experience and third-party components. SAP Commerce Cloud is a best fit for companies that have already bought into SAP S/4HANA and SAP Customer Experience.

- **BigCommerce supports various growth stages but is still making enterprise inroads.** Austin, Texas-based BigCommerce provides a cloud-native, multitenant SaaS with a curated app store and full API coverage. The company targets growth-minded brands that differentiate on customer experience. BigCommerce made a smart play in creating a business user interface that is simple to use and extend while also being flexible. Its product vision and roadmap are above par compared with others in this evaluation. Furthermore, its curated app store provides beginner, intermediate, and advanced capabilities that clients can swap out as their needs evolve over time.

  BigCommerce delivers strong A/B testing and platform integration but is below par in order and price management. Its core technology and ISV partnerships are powerful, but its generalist approach means that agencies need to provide industry-specific expertise to support digital transformations. Customers appreciate how BigCommerce integrates partner-provided services to unify them within the business user interface but felt limited by the lack of available integrations in some areas. BigCommerce is a best fit for companies that value streamlined operations across related functions, with mainstream needs around adjacent technologies so that the currently available preintegrated options are most likely to suit their requirements.

› **Kibo Commerce signals smart strategy with recent assets; integration still to come.** Dallas-based Kibo Commerce consists of solutions acquired over the past five years by Vista Equity Partners, which has continued to add to the solution with more recent additions of Certona and Monetate for personalization and testing. The strategy: Unify a collection of solutions under the Kibo Commerce banner to create a complementary offering. Customers are not yet seeing the benefits of these acquisitions, as many are only months old. They told us they wish for more deeply integrated solutions across the greater solution with simpler, unified administration, which would create a powerful combined value of selling, optimization, and merchandising capabilities.

  Kibo Commerce is above par in testing, search, and promotions, including thoughtful attention to usability in the admin tools. It has opportunities to improve content and campaign management, as well as localization features. Kibo customers would welcome stronger reporting and remain at disparate levels of functionality and integration, as multiple commerce solutions are still working toward a united state. Kibo is a best fit for merchants that are looking for ease of use and are willing to bet on the full-service potential of what's to come as the provider executes on deeper integrations and unification.

› **Oracle marries commerce to experience but doesn't significantly differentiate.** In recent years, Redwood Shores, California-based Oracle has shifted its focus away from accumulating acquisitions that rounded out its owned commerce offerings and toward more deeply incorporating commerce into its broader customer experience (CX) suite. Oracle CX Commerce is positioned as a strategic onramp to cloud commerce for enterprise customers, though current adoption is still mainly among midmarket organizations. It has on-par delivery model upgrades on the roadmap that will bolster the stability of its cloud offering, and customers cite improvements in this area. Its Sales, Marketing, and Configure, Price, Quote (CPQ) clouds provide for a full spectrum solution set that is on par with offerings from other major vendors.

  With the development of Oracle CX Commerce, the company has rearchitected its commerce offering from the ground up. The solution provides on-par foundational functionality in several commerce-adjacent areas, such as customer account management, personalization, and product information management. Depending on the customer's needs, these features may be adequate to delay or avoid integrating additional providers for these functions. The platform is still young and is gaining adoption and reference customers. Current customers tell us they look forward to deeper out-of-the-box integrations across the greater Oracle portfolio. Oracle Commerce Cloud is best for companies that are already using other solutions from Oracle, as they are easiest to integrate, and for those companies that want a cloud-first provider with an all-in-one approach to commerce.

Contenders

- **Episerver pairs commerce and content well but must improve client communication.** Nashua, New Hampshire- and Stockholm-based Episerver began with strong CMS roots and a Microsoft .NET framework and has successfully added commerce to its core functionality. It has solidified itself in the market as a commerce vendor with a strong focus on digital experience. With its recent acquisition of Insite Commerce, Episerver's current strategy is heavily B2B focused. The company demonstrates customer centricity efforts through its app marketplace and as evidenced by its positive growth trajectory. Its product vision and strategy are below par compared with others in this evaluation. Its retail focus is still a young, albeit growing, portion of its business.

  Episerver is above par in content management, omnichannel functionality, and AI-powered personalization. It is below par in product and order management, as well as pricing and promotions. Customers tell us they would like better visibility into and influence over the roadmap, as well as more communication from the vendor in general about changes to features and functionality. Episerver is a good fit for brands seeking to launch a simplified direct-to-consumer digital business because they can leverage the integrated experience layer of this solution.

- **Elastic Path Software tackles complex scenarios, with hefty developer effort.** Vancouver-based Elastic Path was one of the early proponents of headless commerce. Cortex, its hypermedia REST API, gives developers the flexibility to build out just about any commerce experience, without limiting options for complementary partner solutions. To accelerate its move to microservices architecture, Elastic Path acquired Moltin in Q4 2019 — the success of which relies on a plan for its as-yet largely on-premise clients to easily adopt Moltin's capabilities. With great execution, the moves Elastic Path is making now will position it strongly for the future. Its product strategy and vision are on par with others in this evaluation. A reboot of its business user tooling will further help Elastic Path catch up to industry expectations.

  Elastic Path is on par with other vendors on price, account, and order management functionality, but it lags in promotions and product configuration. Compared to other vendors in this evaluation, Elastic Path lacks modern, intuitive business user tooling and workflows. While the design of the business user tooling is familiar to coders, it's foreign to merchandisers and marketers who need to work with agility to respond to shifts in market tastes. This is especially relevant for promotions. Customers with a strong developer culture told us they like the customization framework but would welcome improvements in promotions, subscription management, and partnerships. Elastic Path is best for companies with specialized business models that have a strong development culture to build differentiated commerce experiences.

Challengers

- **Sitecore leverages its winning CMS/DAM to bolster its nascent commerce offering.** As a leader in digital content management (CMS and DAM), Sitecore added commerce to its solution to enable current customers to leverage selling tools without adding another provider. Sitecore has opportunities to improve its delivery model and technology enablement, which are below par compared to other vendors in this evaluation. As a result, customers fall behind by multiple versions and miss the benefits of the most recent releases. Sitecore leverages its content and DAM prowess to tie in a commerce solution but needs to move toward a more modernized experience that minimizes the impact of upgrades. The product vision and roadmap are below par compared with other vendors in this evaluation.

Sitecore offers powerful solutions under its banner for digital content and asset management, which are well integrated with the commerce solution. However, it is limited in terms of commerce features, usability of the interface, and availability of prebuilt integrations to other providers of these critical components of a commerce suite. Customers generally feel well supported and see Sitecore's customer service as attentive. They would enjoy more seamless upgrades, as well as increased flexibility around functionality and customization. Sitecore is a best fit for merchants already using its content and asset management systems and looking for the simplest path forward to add commerce.

Evaluation Overview

We evaluated vendors against 31 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 solutions include content and offer personalization, artificial intelligence and machine learning, campaign management, promotions management, and platform integration.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision and roadmap, delivery model, and technology partners and marketplace.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customers and customer acquisition, total gross merchandise value (GMV), and product revenue.

Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: Adobe, BigCommerce, commercetools, Elastic Path Software, Episerver, Kibo Commerce, Oracle, Salesforce, SAP, and Sitecore. Each of these vendors has:

› **A strong focus on B2C commerce.** These vendors have all critical components of a B2C commerce suite, with solutions for PIM, DAM, CMS, OMS, and personalization included natively, within the family suite, through their app store, or via preintegrated partnerships.

› **Substantial B2C product revenue.** Each vendor has at least $25 million in B2C product revenue.

› **A broad customer base.** The vendors have an existing customer base of enterprise global clients and a focus on more than one region, with current evidence of mindshare and adoption among Forrester clients.

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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.

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 January 2020 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.

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