

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

by Bruce Eppinger and John Bruno
September 13, 2018

Why Read This Report

In our 31-criterion evaluation of B2C commerce suites providers, we identified the 11 most significant ones — commercetools, Digital River, Elastic Path Software, Episerver, IBM, Kibo Commerce, Magento, Oracle, Salesforce, SAP, and Sitecore — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital business professionals select the right provider for their needs.

Key Takeaways

Salesforce And SAP Lead The Pack

Forrester's research uncovered a market in which Salesforce and SAP are Leaders; Magento, IBM, Oracle, Kibo Commerce, and Episerver are Strong Performers; and Elastic Path Software, Sitecore, commercetools, and Digital River are Contenders.

Commerce Experience, User Interfaces, And Operational Efficiency Are Key Differentiators

As legacy technology becomes outdated and less effective, improved evaluation criteria will dictate which providers will lead the pack. Vendors that can provide a better shopping experience with efficient business user interfaces and operational excellence position themselves to successfully help their clients grow revenue, deepen customer loyalty, and expand into new markets.

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

by [Bruce Eppinger](#) and [John Bruno](#)
with [Fiona Swerdlow](#) and Sara Sjoblom
September 13, 2018

Table Of Contents

- 2 To Transform Their Business, Retailers Harness Improved Experience
 - 2 Evaluation Summary
 - 7 Vendor Offerings
 - 7 Vendor Profiles
 - Leaders
 - Strong Performers
 - Contenders
 - 13 Evaluation Overview
 - Vendor Inclusion Criteria
 - 14 Supplemental Material
-

Related Research Documents

- [Best Practices For Commerce Platform Migration](#)
- [Commerce Technology Investment Trends: 2017 To 2018](#)
- [The Forrester Wave™: B2B Commerce Suites, Q3 2018](#)



Share reports with colleagues.
Enhance your membership with
[Research Share.](#)

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

To Transform Their Business, Retailers Harness Improved Experience

Whether in-store or via digital touchpoints, retailers are fully focused on how to grow in a time of continual digital transformation. Physical stores must use their digital touchpoints to enhance the in-store experience; online stores must differentiate with a faster, more informative shopping experience; and omnichannel retailers and brands must deliver a seamless cross-channel experience.¹

Commerce suite vendors are responding to their clients' needs with investments in AI, machine learning, cloud infrastructure, analytics, and business user tooling. These investments automate merchandising, boost the impact that business teams have on the customer experience, and streamline operations. As a result of these trends, B2C commerce suite buyers should look for providers that offer:

- › **Impactful experience.** A core set of commerce experience features ultimately drives the online experience. The most important among those: search, personalization, promotions, and the AI-infused analytics that tie them all together. The ability to target content and products with shopper incentives across the shopper journey is vital to a differentiated online shopping experience.
- › **Business user empowerment.** Responding to shopper demands with agility requires a content management system (CMS) that gives business users the tools to rapidly change how they present content. Attracting and incenting customers requires an integrated 360-degree view of the customer, linked with a promotions and campaign engine that business users can control. We based our scoring for these criteria on how the suites accomplished these tasks, not just on their functional capabilities. Commerce platforms are programmable and customizable; the level of business user control is what truly differentiates the suites.
- › **Operational efficiency.** Commerce vendors have invested in several technologies to reduce the operational cost of their platforms. Most important among these are the improvements to upgrade cycles. Commerce suites providers and their clients take varied approaches to upgrades. What truly matters is that the platform lets clients easily upgrade versions with little regression testing and no recoding. Vital to an easy upgrade cycle is a containerized approach to deployment that manages versions and automates scaling, as well as an abstracted API layer to isolate the commerce runtime from store customizations.²

Evaluation Summary

Our Forrester Wave evaluation highlights that AI and machine learning capabilities are infused into experiences across the suite and are especially prevalent in search, merchandising, and product recommendations. SAP and Salesforce both demonstrated strong AI capabilities that also enjoy wide adoption among their customers. B2C vendors are expanding their focus to B2B models: Six of the vendors in this evaluation participated in both the B2B and the B2C Forrester Wave evaluations, and the rest are investing to support B2B models.³ The vendors in this Forrester Wave represent three

The Forrester Wave™: B2C Commerce Suites, Q3 2018

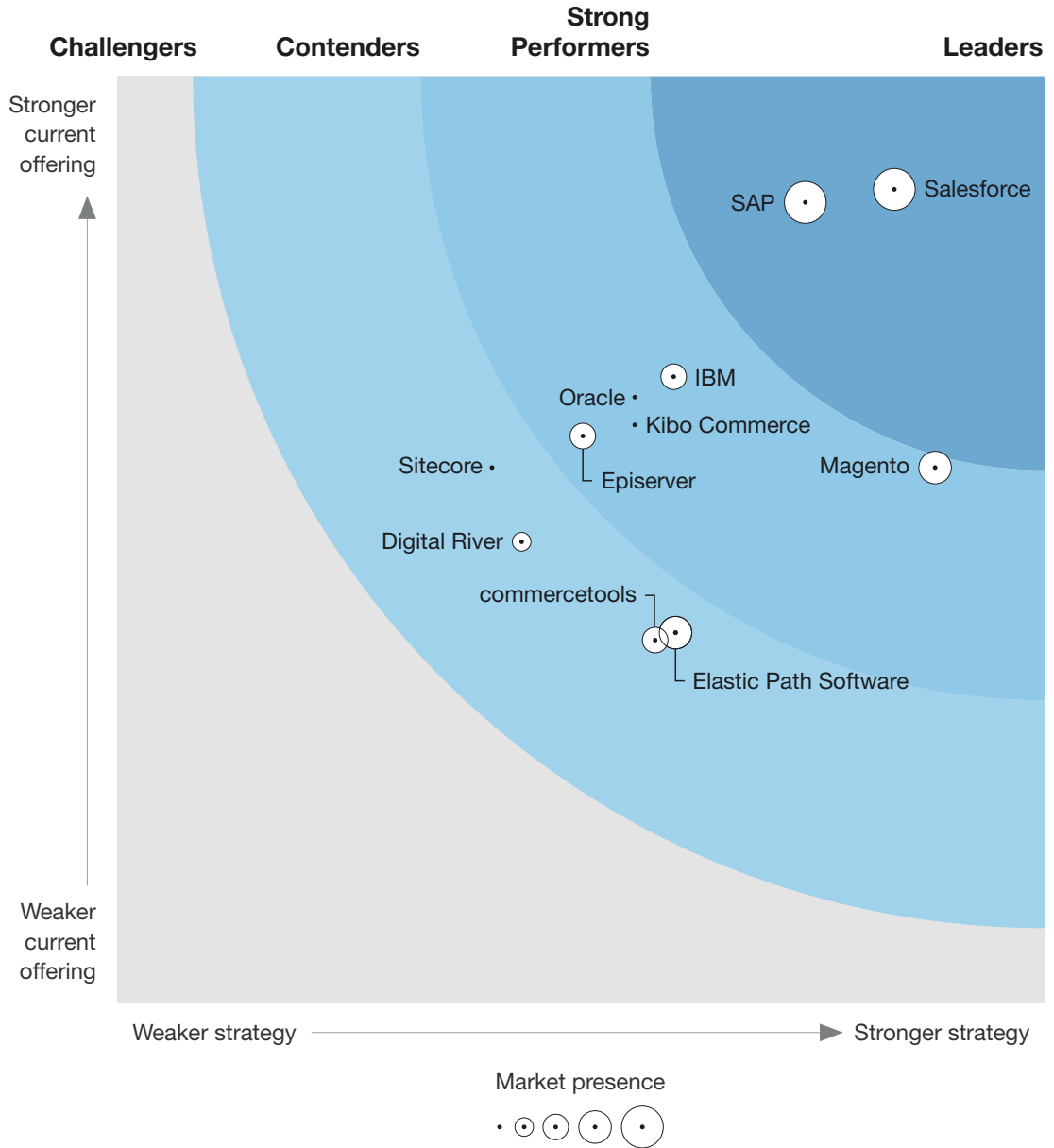
The 11 Providers That Matter Most And How They Stack Up

approaches to digital commerce. First, there are full-service suites that are building integrated, best-in-class capabilities for as many of the commerce platform components as possible. Second, we see headless commerce vendors — commercetools and Elastic Path Software — that have suite components but focus on an API-first model and integration capabilities. The third approach is commerce-as-a-service, embodied by Digital River, which offers a commerce suite wrapped in its go-to-market and payment services.

We intend this evaluation of the B2C commerce suites market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through 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, Q3 2018

THE FORRESTER WAVE™
B2C Commerce Suites
 Q3 2018



The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: B2C Commerce Suites Scorecard, Q3 2018

	Forrester's weighting	commercetools	Digital River	Elastic Path Software	Episerver	IBM	Kibo Commerce
Current offering	50%	1.96	2.49	2.00	3.06	3.38	3.12
Sales channel support	10%	3.80	2.20	3.80	3.00	1.40	2.20
Personalization	10%	1.00	1.60	1.00	3.80	3.00	5.00
Business intelligence and analytics	4%	1.00	3.00	3.00	1.00	3.00	1.00
Artificial intelligence and machine learning	6%	3.00	1.00	0.00	3.00	5.00	1.00
Commerce suite	25%	0.60	2.60	0.60	3.40	4.00	2.90
Commerce management	30%	2.00	3.00	2.80	3.00	3.60	3.40
Platform	15%	3.40	2.50	2.70	2.70	2.90	3.70
Strategy	50%	2.90	2.18	3.01	2.51	3.00	2.79
Product vision and road map	25%	5.00	1.00	5.00	3.00	3.00	3.00
Delivery model	5%	5.00	5.00	3.00	3.00	3.00	3.00
Support services	35%	3.00	3.80	3.00	1.60	2.40	3.00
Delivery and extensibility ecosystem	35%	1.00	1.00	1.60	3.00	3.60	2.40
Market presence	0%	3.00	2.00	4.00	3.00	3.00	1.00
Number of live enterprise customers	50%	3.00	1.00	5.00	3.00	3.00	1.00
Total gross merchandise value (GMV)	25%	3.00	3.00	3.00	3.00	3.00	1.00
Product revenue	25%	3.00	3.00	3.00	3.00	3.00	1.00

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: B2C Commerce Suites Scorecard, Q3 2018 (Cont.)

	Forrester's weighting	Magento	Oracle	Salesforce	SAP	Sitecore
Current offering	50%	2.89	3.27	4.39	4.32	2.89
Sales channel support	10%	5.00	3.00	4.20	5.00	2.20
Personalization	10%	2.40	3.00	5.00	4.40	3.60
Business intelligence and analytics	4%	5.00	3.00	5.00	3.00	3.00
Artificial intelligence and machine learning	6%	0.00	3.00	5.00	5.00	1.00
Commerce suite	25%	3.00	3.40	4.00	4.40	4.00
Commerce management	30%	2.20	3.20	4.40	4.40	2.80
Platform	15%	3.60	3.70	4.30	3.60	1.90
Strategy	50%	4.41	2.79	4.19	3.71	2.02
Product vision and road map	25%	5.00	3.00	3.00	5.00	3.00
Delivery model	5%	3.00	3.00	3.00	3.00	3.00
Support services	35%	3.60	3.00	4.40	3.00	1.60
Delivery and extensibility ecosystem	35%	5.00	2.40	5.00	3.60	1.60
Market presence	0%	4.00	1.00	5.00	5.00	1.00
Number of live enterprise customers	50%	3.00	1.00	5.00	5.00	1.00
Total gross merchandise value (GMV)	25%	5.00	1.00	5.00	5.00	1.00
Product revenue	25%	5.00	1.00	5.00	5.00	1.00

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

Vendor Offerings

Forrester included 11 vendors in this assessment: commercetools, Digital River, Elastic Path Software, Episerver, IBM, Kibo Commerce, Magento, Oracle, Salesforce, SAP, and Sitecore (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product	Version
commercetools	commercetools platform	N/A
Digital River	Digital River Global Commerce	N/A
Elastic Path Software	Elastic Path Commerce	7.3
Episerver	Episerver Digital Experience Cloud	11
IBM	IBM Watson Commerce	18.2
Kibo Commerce	Kibo eCommerce	N/A
Magento, an Adobe company	Magento Commerce	2.2.4
Oracle	Oracle Commerce Cloud	18B
Salesforce	Salesforce B2C Commerce	N/A
SAP	SAP Commerce Cloud	6.7
Sitecore	Sitecore Experience Commerce 9	9

Vendor Profiles

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

Leaders

- › **Salesforce Commerce Cloud AI drives online sales.** Salesforce B2C Commerce (formerly Demandware), a product of Salesforce Commerce Cloud, is the retail digital commerce behemoth, processing \$21 billion in GMV annually on its commerce cloud and supporting over half a billion unique monthly shopper visits across the globe.⁴ This all-cloud, all-vendor hosted solution provides Salesforce customer success managers (CSMs) and customers with access to collective store metrics for rich shared data insights. Salesforce B2C Commerce is sold on a revenue

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

share model as a percentage of GMV. This combination is powerful: “The [Salesforce] customer success manager calls me to suggest improvements to grow revenue for no extra fee because of the revenue share model,” one customer explained. In 2018, Salesforce acquired B2B vendor CloudCraze; these products are two separate platforms, and Salesforce B2C Commerce does not support B2B scenarios.

Salesforce B2C Commerce provides out-of-the-box digital business tuned for the retail B2C market. For those willing to adopt the Salesforce model, this architecture accelerates the speed of implementation, reduces implementation costs, and provides rapid entry to the platform’s extensive capabilities. Of note, customers tell us that coding customization is more expensive than for other platforms. Salesforce Einstein infuses experiences across all aspects of the platform, including search, product recommendations, and product content improvements. Salesforce B2C Commerce is best for retailers that are looking for an out-of-the-box cloud solution and are willing to accept a shared revenue model.

- › **SAP Commerce Cloud delivers a full-featured suite for enterprise clients.** SAP Commerce Cloud version 6.7 delivers a full-featured suite that leverages the strengths of the SAP ecosystem and integrates with the SAP S/4HANA and SAP C/4HANA applications. It has a 50/50 revenue split of B2B and B2C clients and is equally adept at both. SAP has invested heavily in its cloud strategy that now includes deployment on both the private SAP cloud and a Kubernetes-based Microsoft Azure public cloud deployment. SAP is realizing the benefits of this focus, as half of its 2017 commerce revenue came from its cloud offering.

SAP boasts outstanding enterprise customer references who reported seamless scaling and load management for billion-dollar GMV loads: As one customer stated, “We can ramp to a million transactions a day with no concerns; the platform is rock solid and enterprise ready.” It is one of the few platforms to deliver a full-service PIM, as well as an OEM version of an industry-leading DAM (OpenText) that SAP integrates, sells, and supports.⁵ The road map includes plans for deeper integration to the SAP C/4HANA suite, with specific plans to embed the SAP CPQ (configure price quote) (formerly CallidusCloud CPQ) solution. SAP has substantially improved the suite’s user tooling and integration. Its container architecture and architectural improvements have reduced the high IT load and longer-than-average implementation timelines. Even so, we agree with the user feedback that “the platform is only suitable for organizations with deep technical skills or a strong SI partnership.” SAP Commerce Cloud is a best fit for companies looking for an industrial-strength full-function commerce platform in wide use across several industry verticals.

Strong Performers

- › **Magento Commerce delivers customizable solutions by a global community.** The Magento Commerce suite consists of its paid solution or widely adopted open source commerce platform and the relatively new, but highly capable, business intelligence (BI) platform and full-service OMS.⁶ It has one of the largest commerce ecosystems, with over 3,000 extensions in the marketplace

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

and over 50% of new code coming from its open source community. After shifting to the Magento 2 code base in 2015, Magento started moving its products to the cloud. Since 2016, it has offered continuous-delivery platform-as-a-service capabilities atop AWS; OMS and BI have been SaaS since their inception.⁷ Adobe's acquisition of Magento Commerce in June 2018 fills gaps for both companies, delivering a transactional platform to the Adobe Experience Cloud and delivering world-class experience management to Magento clients.⁸

The suite's strengths are a rock-solid cart, the OMS, and the BI capabilities. The OMS covers the full range of distributed order scenarios, as well as in-store retail fulfillment tools and support for B2B fulfillment. The BI tools provide aggregated analytics across enterprise systems and come with over 100 prebuilt reports. Integration with Adobe should address the weakness of the native content management tools, which customers reported as substandard. Customers also reported native search results that lacked relevance and slow indexing. Magento is a best fit for clients that are looking to customize their solution, value the open source model and its extensive ecosystem, and want an affordable alternative to the Salesforce and SAP Commerce Clouds.

- › **IBM's comprehensive, if unwieldy, solution needs to modernize more quickly.** A mainstay in the enterprise eCommerce market since the mid-1990s, IBM has continually improved, added, and acquired functionality to Watson Commerce. All that tinkering has created a full-featured (if also large and cumbersome) commerce suite across commerce, content, and order management.⁹ IBM has begun to rearchitect the solution to be nimbler and more modular, but the late start on this effort means it has lost its market leadership position and ground to defter competitors.

IBM delivers well in the areas of transactions, personalization, and intelligence. The company achieved early success introducing elements of Watson — IBM's suite of cognitive and AI services — into its commerce offerings. It exposes rich operational trends through Watson Commerce Insights and has plans to add more intelligent automation into administrative process (e.g., cognitive tagging for site content). IBM customers give the solution credit for its advances in AI, but they don't see the company making enough progress in its platform modernization efforts. Customers also often lament labor- and time-intensive upgrade processes. The legacy of this platform carries over to the user experience, as administration is relatively more complex than that of many of its competitors. IBM is a good fit for large enterprises with the budget, resources, and willingness to bet on the company's ability to execute on its modern platform vision. Less mature organizations will likely find this suite too cumbersome.

- › **With Commerce Cloud, Oracle breathes fresh life into its ATG and Endeca assets.** When it acquired ATG and Endeca in 2010 and 2011, respectively, Oracle became an early mover among large CRM vendors that added eCommerce solutions to their portfolios.¹⁰ Like other leading on-premises software solutions, the original ATG and Endeca solutions have largely taken a back seat to Oracle's cloud offering, Commerce Cloud. The move to the cloud has allowed Oracle to rearchitect the solutions to align with the larger Oracle CX suite strategy, data model, and services. Its closest kin are Oracle CPQ Cloud, Sales Cloud, and Marketing Cloud.

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

Oracle Commerce Cloud is a purpose-built solution with modern architecture. It is designed to complement its other applications as much as it borrows from them — it is not just an add-on to Oracle's CX Suite of front-office applications. B2C customers can leverage the broader Oracle portfolio by integrating with Oracle's Marketing and Service Clouds. The potential for Oracle Commerce Cloud is great: It has invested in rearchitecting the suite for the cloud. When linked to Oracle Data Cloud, Oracle Commerce Cloud clients can enhance personalization experiences with access to profile data for 5 billion global IDs. The new platform has only been live for two years and is still gaining adoption, reference customers, and stability. Oracle is best for companies looking for a cloud-first subscription service that can fully leverage and integrate with other Oracle assets that the customer already has in place.

- › **Kibo Commerce delivers a cost-effective cloud-based suite for the midmarket.** Dallas-based Kibo has spent the last two years integrating a collection of commerce tech acquisitions, starting with the cloud-based Mozu commerce engine.¹¹ It has since added to the suite Baynote for personalization, Shopatron for OMS, and mobile POS vendor Fiverun.¹² The Kibo cloud suite targets the lower end of the commerce market (under \$150 million in GMV). Kibo's legacy base is still running the aging MarketLive platform, but it is building momentum on its cloud-based Kibo eCommerce. This solution is one of the smaller vendors in the 2018 commerce suites Forrester Wave and is primarily focused in North America on the B2C market. It supports some limited B2B use cases but is not a dual-use vendor.

Kibo's strengths include its content management and personalization. The WYSIWYG content editor provides an easy-to-use business user interface. Plus, the integrated solution of Baynote and Mozu allows for excellent control of merchandising throughout the shopper journey. Customers who selected Kibo told us they liked working with a responsive, small vendor, and they consistently told us that price was a significant factor in selecting Kibo. The analytics capabilities of the suite are rudimentary, and customers also noted this limitation. The Kibo platform is maturing, but customers also raised stability concerns in comparison to their experience with other more mature suite leaders. Kibo is a best fit for small to midsize enterprises that want to work with an evolving cloud-based vendor.

- › **Episerver is a commerce suite anchored by a leading content management system.** Episerver has added transactional commerce and strong marketing campaign capabilities to what is already a leading web content management platform.¹³ The suite is deeply rooted in the .NET ecosystem and delivers a cloud-based agile platform with a continuous release deployment cycle. The company sources 50% of its deals from the partner network, which also delivers the majority of the implementations. Episerver has been growing its presence beyond Europe and into North America while serving both B2B and B2C markets.

Episerver's strengths include a leading CMS, a natively integrated customer data management platform, and a full-service marketing campaign management system. Put together, these capabilities allow Episerver customers to customize experience delivery by segment, user behavior,

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

and even the device that the customer is using. Episerver customers we spoke with all chose the product because of their desire to marry web CMS and their overall digital experience, with the ability to transact digitally. Customers rave about the integrations of web content and commerce, but the company needs to fill some gaps. For example, its A/B testing capabilities are lightweight compared to those of competitors, and customers cited recurring issues with indexing and performance with Find, Episerver's site search tool. As the company grows, its customers have expressed that they want better documentation and insight into the product road map. Episerver is a best fit for brands or customers that want to lead with experience-driven commerce and that need a commerce platform that has a great CMS and is extremely cost-competitive.

Contenders

- › **“Commerce anywhere” is Elastic Path's strength.** Elastic Path offers a headless commerce solution, relying on partners to deliver the front-end experience. As the headless market evolves, so does Elastic Path, with a new focus to push the boundaries of commerce to a constellation of nontraditional and emerging touchpoints. What differentiates Elastic Path from all other headless and API-first vendors is its Cortex orchestration layer. This commerce choreography layer simplifies the process of integrating new marketing and sales touchpoints. With Cortex, the flow logic of a shopping or purchase experience lives in Elastic Path and not in the interface device. This pattern vastly reduces the implementation time required to extend commerce to POS, internet of things (IoT), or other devices, as most coding stays in Elastic Path and not in the device.

The platform has a strong promotions engine with an administrative UI that allows customers to create and manage complex promotions and couponing. As a headless commerce platform, it lacks a content manager, it has a basic PIM, and order management is limited to a single source of inventory for a single store. Given that it is a headless commerce vendor, we expected a stronger cloud model. Its cloud offering closely resembles containerized on-premises software that can be hosted in any public cloud or deployed on-premises. Clients love the extension model, telling us that they have executed several upgrades without compatibility issues or recoding. However, they also told us that the upgrade cycle still requires an install and regression test cycle. Elastic Path is best for customers looking to build commerce experiences into embedded systems, such as cars, POS devices, and wearables.

- › **Sitecore is a transactional customer experience platform.** Founded in Copenhagen and now based in San Francisco, Sitecore has a strong reputation in the web CMS space and has adjacent capabilities around digital marketing and customer analytics.¹⁴ In 2013, the firm expanded into commerce with its acquisition of Commercserver.net. With version 9, the company rebuilt the commerce engine and integrated it with the Sitecore Experience Database, marketing campaign engine, and content management system. Version 9 is .NET-based and hosted on the Azure cloud. Sitecore has introduced support for both B2C and B2B models and has outlined expanding support for B2B in its road map.

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

Sitecore delivers strong brand and experience management capabilities, but it lags in commerce-specific functionality around product content and product merchandising. In addition to the content management capabilities, Sitecore's customer experience platform provides extensive journey mapping and customer analytics built on the Sitecore Experience Database (xDB). Customers report that it can be hard to find Sitecore partners for commerce. Sitecore is a best fit for firms that want to manage a brand site and content in a suite that bundles marketing campaign management and a customer experience database.

- › **Commercetools is the platform for the post-web era.** As a true multitenant platform of more than 300 consumable microservices, commercetools rejects the monolith approach to commerce. This Germany-based company provides an open API platform where potential customers can self-service provision themselves with a commerce environment. The company's openness is exemplified by its public status page that reports current platform status and the historical log of operational issues.¹⁵ The platform offers a usage-based à la carte price model for customers to consume its microservices. Commercetools markets itself to companies that are looking for a headless solution and to those that deliver commerce beyond traditional use cases.

Commercetools' strengths are found in its platform, architecture, and cloud delivery model. The continuous DevOps model eliminates the painful upgrade cycle that drives most platform users to undertake expensive replatforming projects. To be clear, this solution is not a suite: It is designed as a headless platform that provides APIs for product information management services, while offering no CMS and only limited order management capabilities. But flexibility makes up for what it lacks in functionality. The platform is ideal for those planning to take a "strangle and replace" approach to migrating off a legacy platform.¹⁶ Its true value is to those who want to deliver the next generation of commerce experiences. As one customer told us, "We are stitching and knitting experiences using their microservices." Commercetools is best for IT-centric organizations that need cloud-based microservices to support their commerce road map.

- › **Digital River delivers the global commerce-as-a-service outsourcing solution.** Digital River is a combination commerce suite, payment provider, and reseller. It provides brands with global transactional capabilities on its commerce-as-a-services solution. Furthermore, the solution focuses on brands that want to extend their reach globally and that depend on the expertise of their suite provider to teach them the ropes of global online retail. Digital River provides myriad services, unlike any other commerce suite in this Forrester Wave, including owning the payment fraud risk, providing international sales tax calculation and remittance, and integrating with a network of 85 distribution centers around the world.

As one customer explained, "We own getting the customer to click 'add to cart,' and Digital River owns the cart and transaction." The Digital River cart handles cross-selling and payments for an impressive 190 countries and 64 local currencies. These transactional capabilities are its strong suit. It also excels at handling subscription billing and delivery of digital products and services.¹⁷ Digital River customers love the service provider model and tell us they are delighted

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

with the partnership, but they also tell us that Digital River is slow to innovate and bring online new capabilities. Digital River is best for those looking to expand globally and to outsource the transactional overhead of international.

Evaluation Overview

The Forrester Wave follows a publicly available methodology that involves screening vendors, detailed questionnaires, and customer reference checks. In our scoring, Forrester uses a relative rating system to differentiate the vendor's capabilities. Vendor scores do not reflect a checklist of functionality; they are a comparison of the strengths and weaknesses of the offerings we analyzed. Find more information about the methodology in the Supplemental Material section of this report.

We evaluated vendors against 31 criteria, which we grouped into three high-level buckets:

- › **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 the support for various sales channels, personalization, analytics, AI and machine learning, commerce suite components (CMS, OMS, DAM, PIM, and campaign management), commerce management (search, price, promotions, etc.), and platform capabilities.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each vendor's product vision and road map, software delivery model, enablement and support services, delivery partners, and technology partners.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of enterprise customers in a production environment, the total amount of GMV processed on its platform, and its product revenue.

Vendor Inclusion Criteria

Forrester included 11 vendors in the assessment: commercetools, Digital River, Elastic Path Software, Episerver, IBM, Kibo Commerce, Magento, Oracle, Salesforce, SAP, and Sitecore. Each of these vendors has:

- › A strong focus on B2C commerce.
- › All critical components of a B2C commerce suite.
- › At least \$30 million in product revenue.
- › An existing customer base of enterprise global clients and a focus on more than one region.
- › Mindshare among Forrester clients and is frequently mentioned in the context of inquiry, briefings, and consulting engagements.

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

[Learn more.](#)

Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

[Learn more.](#)

Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

[Learn more.](#)



Forrester's research apps for iOS and Android.

Stay ahead of your competition no matter where you are.

Supplemental Material

Online Resource

We publish all of our scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; access this tool by clicking the link the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point, and we 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™: B2C Commerce Suites, Q3 2018

The 11 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 a small number of 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. In accordance with the [Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave document. We evaluated the vendors participating in this Forrester Wave using materials that they provided to us by June 2018 and did not allow additional information after that point. We encourage readers to consider how the market and vendor offerings change over time.

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 to the best of our ability according to our [Forrester Wave™ Incomplete Vendor Participation Policy](#) and publish their positioning along with 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 "[Mastering The Art Of Omnichannel Retailing.](#)"
- ² See the Forrester report "[Container Platforms Accelerate Digital Transformation.](#)"
- ³ Episerver, IBM, Magento, Oracle, Salesforce, and SAP are all participants in the companion B2B commerce suites evaluation. See the Forrester report "[The Forrester Wave™: B2B Commerce Suites, Q3 2018.](#)"
- ⁴ GMV: gross merchandise volume.
- ⁵ PIM: product information manager; DAM: digital asset manager. See the Forrester report "[The Forrester Wave™: Digital Asset Management For Customer Experience, Q2 2018.](#)"
- ⁶ Source: "Magento Commerce Acquires RJMetrics," Magento press release, August 1, 2016 (<https://magento.com/news-room/press-releases/magento-commerce-acquires-rjmetrics>).
- ⁷ AWS: Amazon Web Services; OMS: order management service; SaaS: software-as-a-service.
- ⁸ Source: Mark Grannan and John Bruno, "The Magento Acquisition Finally Moves Adobe 'Beyond Marketing,' But It's Just The First Step," Forrester Blogs, May 22, 2018 (<https://go.forrester.com/blogs/magento-acquisition-finally-moves-adobe-beyond-marketing-but-its-just-the-first-step/>).
- ⁹ Source: "IBM Agrees to Acquire Sterling Commerce from AT&T for \$1.4 Billion," IBM press release, May 24, 2010 (<https://www-03.ibm.com/press/us/en/pressrelease/31742.wss>).
- ¹⁰ Source: "Oracle Buys ATG," Oracle press release, November 2, 2010 (<http://www.oracle.com/us/corporate/press/184062>) and "Oracle Buys Endeca," Oracle press release, October 18, 2011 (<http://www.oracle.com/us/corporate/press/517791>).

The Forrester Wave™: B2C Commerce Suites, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

¹¹ Source: “Kibo Accelerates Omnichannel Commerce Platform Capabilities With Acquisition Of Mozu,” Kibo press release, October 18, 2016 (<https://kibocommerce.com/press-events/kibo-acquires-mozu/>).

¹² POS: point of sale.

Source: “Kibo Empowers Retailers To Individualize Consumer Experiences With Baynote Acquisition,” Kibo press release, September 27, 2016 (<https://kibocommerce.com/press-events/kibo-acquires-baynote/>), “Vista Equity Partners Signs Definitive Agreements To Acquire MarketLive And Shopatron,” Kibo press release, November 25, 2015 (<https://kibocommerce.com/press-events/vista-equity-partners-maketlive-shopatron/>), and “Vista Equity Partners Announces Launch Of Kibo, A Unified Omnichannel Commerce Solution,” Kibo press release, January 14, 2016 (<https://kibocommerce.com/press-events/vista-acquires-fiverun-launches-kibo/>).

¹³ See the Forrester report “[The Forrester Wave™: Web Content Management Systems, Q1 2017.](#)”

¹⁴ Sitecore was rated a Strong Performer in the 2017 web CMS Forrester Wave. See the Forrester report “[The Forrester Wave™: Web Content Management Systems, Q1 2017.](#)”

¹⁵ Source: [commercetools](http://status.commercetools.com/) (<http://status.commercetools.com/>).

¹⁶ See the Forrester report “[Best Practices For Agile-Plus-Architecture.](#)”

¹⁷ See the Forrester report “[The Forrester Wave™: Recurring Customer And Billing Management, Q3 2017.](#)”

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

- › Core research and tools
- › Data and analytics
- › Peer collaboration
- › Analyst engagement
- › Consulting
- › Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals

CMO

B2B Marketing

B2C Marketing

Customer Experience

Customer Insights

› **eBusiness & Channel Strategy**

Technology Management Professionals

CIO

Application Development & Delivery

Enterprise Architecture

Infrastructure & Operations

Security & Risk

Sourcing & Vendor

Management

Technology Industry Professionals

Analyst Relations

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.