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# The Forrester Wave™: B2C Commerce Solutions, Q2 2022

## The Nine Providers That Matter Most And How They Stack Up

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### Summary

In our 27-criterion evaluation of B2C commerce solutions providers, we identified the nine most significant ones — Adobe, BigCommerce, commercetools, Kibo Commerce, Optimizely, Salesforce, SAP, Shopify Plus, and VTEX — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital professionals select the right one for their needs.

## B2C Digital Businesses Are Forcing Commerce Technology Forward

Modular, cloud-native [commerce solutions](#) are no longer just for the most digitally mature companies. In fact, modern commerce tech is more adaptive and provides resilience for the digital businesses that use it. Retailers and digital direct-to-consumer businesses are [strapped for staff](#), forced to move faster than ever, and heavily reliant on technology. That reliance, coupled with lightning-fast changes to consumer expectations, drives them to seek constant technological innovation, even if their adoption of it is [frustratingly slow and incremental](#). In-store, retailers add dedicated [point-of-service store fulfillment tools](#) or look to other categories, like [order management systems \(OMS\)](#), to layer on these suddenly mandatory requirements. In the meantime, their legacy technology languishes underneath as they pile on software as a service (SaaS) components until they can make the final [leap to a full SaaS architecture](#). In commerce, this exodus to modern solutions, architecture, and delivery models rewards the vendors that have invested in tech that enables them — and their users — to innovate faster.

As a result of these trends, B2C commerce solutions customers should look for providers that:

- **Make it clear they see you as their ideal, target customer.** Identify the solution that best serves your current commerce tech gaps and requirements. The current B2C commerce market is populated by an eclectic selection of solutions with varied delivery models, cultures, and functionality. Our [2020 Forrester Wave™ on B2C commerce](#) evaluated “commerce suites” and



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interoperate with decoupled components through APIs and events, and they isolate custom code from core product. The solutions have self-service free trials that enable business teams to demonstrate how much they can deliver in just a few sprints. The solutions' externally observable characteristics are that they are versionless, auto scale, enable rapid development velocity (for both the vendor and the business), support a full slate of best-in-class capabilities (via ISV partners), and expose their customers to open market cost of talent (because their systems are programming language agnostic with no proprietary frameworks to learn).

- **Prioritize the nontechnical practitioner experience.** Digital businesses require practitioner user interfaces (UIs) that enable instant usability (without extensive training), efficient workflows (without wasted time or frustration), and unified administration of functions (to avoid using a variety of diverse interfaces). These systems should expose the full scope of functionality that the solution offers out of the box, while enabling businesses to customize the UI to their preferences. API-first systems make building and updating the UI simpler than ever, but [vendors must also provide](#) — and maintain — a fully featured, highly usable reference interface.

## 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 on [how brands and retailers are replacing legacy commerce technology](#), [the future of commerce tech](#), and the [Now Tech for B2C commerce solutions](#).

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.

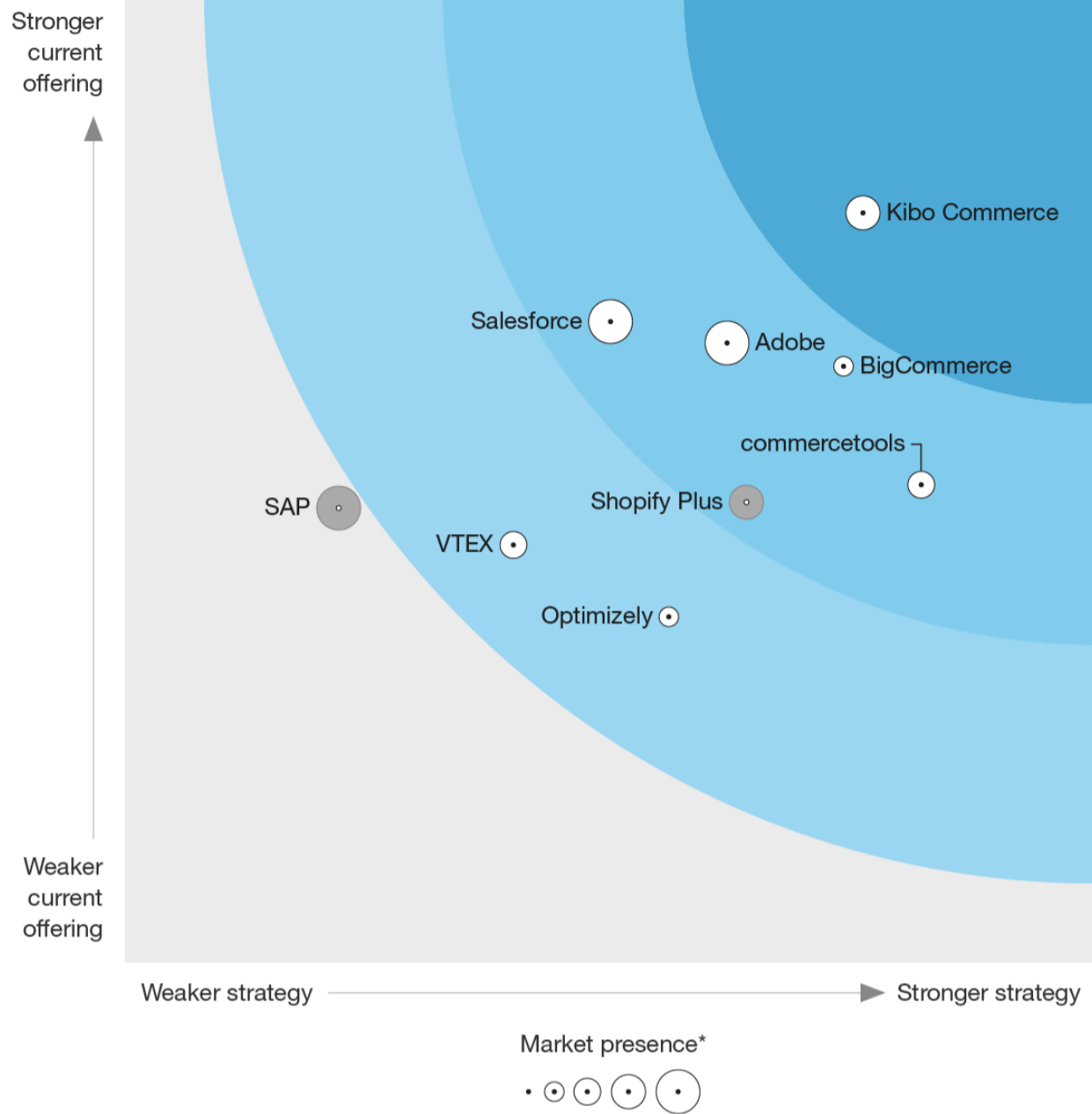
Figure 1

**Forrester Wave™: B2C Commerce Solutions, Q2 2022**



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\*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2

Forrester Wave™: B2C Commerce Solutions Scorecard, Q2 2022



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Search and merchandising	12%	5.00	1.00	1.00	3.00	3.00	5.00	3.00	1.00	3.00
Reporting and analytics	5%	5.00	3.00	1.00	5.00	1.00	3.00	1.00	3.00	3.00
Customer management and service	5%	5.00	3.00	1.00	5.00	1.00	3.00	1.00	3.00	1.00
Order and inventory management	5%	3.00	1.00	1.00	5.00	3.00	3.00	3.00	1.00	1.00
Role-based access management	5%	3.00	5.00	1.00	5.00	1.00	3.00	3.00	3.00	3.00
Product catalog management	12%	3.00	1.00	3.00	3.00	1.00	5.00	5.00	1.00	1.00
Promotions management	8%	3.00	5.00	3.00	3.00	1.00	1.00	3.00	3.00	1.00
Third-party channels	5%	3.00	3.00	1.00	5.00	1.00	3.00	1.00	5.00	3.00
Customer success and support	5%	1.00	5.00	3.00	1.00	5.00	3.00	1.00	3.00	1.00
Digital products and subscriptions	5%	5.00	1.00	3.00	3.00	1.00	1.00	3.00	1.00	5.00
Multisite	3%	3.00	1.00	5.00	5.00	5.00	3.00	5.00	1.00	3.00
Practitioner UX	10%	3.00	5.00	1.00	3.00	1.00	3.00	1.00	5.00	1.00
Architecture	7%	1.00	5.00	5.00	5.00	1.00	3.00	1.00	1.00	3.00
Extensibility and integration tools	8%	1.00	5.00	5.00	5.00	1.00	3.00	1.00	3.00	3.00
<b>Strategy</b>	<b>50%</b>	<b>3.10</b>	<b>3.70</b>	<b>4.10</b>	<b>3.80</b>	<b>2.80</b>	<b>2.50</b>	<b>1.10</b>	<b>3.20</b>	<b>2.00</b>
Product vision	15%	3.00	5.00	5.00	5.00	3.00	3.00	1.00	3.00	3.00
Execution roadmap	25%	3.00	3.00	5.00	3.00	3.00	3.00	1.00	3.00	1.00
Performance	10%	3.00	5.00	5.00	5.00	1.00	1.00	1.00	3.00	3.00
Innovation roadmap	20%	3.00	5.00	5.00	3.00	3.00	1.00	1.00	3.00	3.00
Supporting products and services	20%	3.00	1.00	1.00	5.00	3.00	3.00	1.00	3.00	1.00
Partner ecosystem	5%	5.00	5.00	3.00	1.00	3.00	5.00	3.00	5.00	1.00
Commercial model	5%	3.00	5.00	5.00	3.00	3.00	3.00	1.00	5.00	3.00
<b>Market presence</b>	<b>0%</b>	<b>4.50</b>	<b>2.00</b>	<b>2.50</b>	<b>3.50</b>	<b>2.00</b>	<b>5.00</b>	<b>5.00</b>	<b>3.50</b>	<b>2.50</b>
Customers	50%	5.00	1.00	2.00	4.00	2.00	5.00	5.00	2.00	1.00
Product revenue	50%	4.00	3.00	3.00	3.00	2.00	5.00	5.00	5.00	4.00

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

\*Indicates a nonparticipating vendor

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## Vendor Offerings

Forrester included nine vendors in this assessment: Adobe, BigCommerce, commercetools, Kibo Commerce, Optimizely, Salesforce, SAP, Shopify Plus, and VTEX (see Figure 3).

Figure 3

### Evaluated Vendors And Product Information



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Kibo Commerce	Kibo Headless eCommerce	
Optimizely	B2C Commerce Cloud	14.0
Salesforce	Salesforce B2C Commerce	
SAP	SAP Commerce Cloud	
Shopify Plus	Shopify Plus	
VTEX	VTEX Commerce Platform	

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## Vendor Profiles

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

### Leaders

- **Kibo continues to leverage the value of its acquisitions, but its roadmap needs clarity.** Based in Dallas, Texas, Kibo Commerce is deliberately building a unified platform of its acquired solutions. It continues to bring more functionality “under the tent” of the platform, including personalization functionality gained from its Monetate and Certona acquisitions and order management features included out of the box with commerce. Kibo has strengths in product vision and supporting products and services, as it now has unified functions from its acquisitions and shares them between products in its platform. Its partner ecosystem is weaker; it needs to catch up to others that have longer tenure with enterprise service providers. Its roadmap is high level but includes themes of continued feature expansion around order management and customer experience, as well as practitioner UX improvements. Kibo is strong in front-end management, reporting and analytics, and order and inventory management. It is weaker in customer success and support. Kibo’s reference customers tell us that while they have a strong, positive relationship with the vendor, they would appreciate a deeper investment in noncritical support and would like to see additional features added more quickly. Kibo is a best fit for digital businesses that prioritize a preintegrated platform with shared services across functional areas.

### Strong Performers

- **BigCommerce grows with a differentiated strategy but is still fighting its way upmarket.** Based in Austin, Texas, BigCommerce filed for its IPO in 2020 and has continued its strong growth as a public company. The solution provides native capabilities for low-complexity business models and flexible APIs for more complex business models. BigCommerce has a strong partner ecosystem and good performance against its product vision by unifying and simplifying administration of both first- and third-party functions. It needs more breadth and depth in its supporting products and services. Its roadmap is one of the strongest in this evaluation and includes plans for deeper integration of third-party apps and additional native integrations with complementary solutions, such as customer data platforms. BigCommerce has strengths in practitioner UX, architecture, and extensibility and integration. It has weaknesses in front-end management and order and inventory management. Reference customers are enthusiastic about BigCommerce as a trusted partner, and it garnered the highest marks from references in this evaluation. Reference customers want improvements



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commerce solution. Its new corporate strategy promises a series of acquisitions of similarly architected solutions. In Q4 2021, it acquired Frontastic, making commercetools the headless commerce company with a leading front end. The two solutions are preintegrated but still function as two solutions with isolated user interfaces. Currently, commercetools has strengths in its product vision, performance against that vision, and execution roadmap, as it paves a new road with strong headless commerce to support both B2B and B2C use cases that is gaining mainstream market traction. It's weaker in its range of supporting products and services, as its portfolio is limited to commerce — and now experience. Its two-pronged roadmap will break down its existing platform into a handful of smaller components that can be bought separately and will also expand its capabilities both inorganically and organically. Commercetools has strengths in architecture, front-end management, and extensibility and integration. It has weaknesses in its practitioner UX, order and inventory management, and search and merchandising. There are some functions, such as editing orders after they are placed, that are possible only via development to access the functionality or expose it in a user interface. Reference customers wished for more proactive innovation from the vendor. Commercetools is a best fit for businesses with a complex digital strategy and a modern, well-resourced development team that prefer cloud-native, API-first technology.

- **Adobe's commerce product evolves but is not united with its strong experience portfolio.**

Based in San Jose, California, Adobe is known for its creative tools and Experience Cloud for enterprises. Its commerce product has continued to grow, both in terms of revenue and customers. However, the vendor's commerce and experience products are not unified under a single platform and do not share most functions between them. Adobe focuses on functional value-adds that leverage additional services, such as integrating Adobe Sign and adding payment service for Adobe Commerce. Adobe is on par with others in most of the strategy criteria but is stronger in its partner ecosystem. It is one of the few enterprise commerce solutions going to market with a unified B2B and B2C solution in the core product, and it plans to bring more AI-powered innovation to the product through Adobe Sensei. Adobe Commerce has strengths in front-end management, search and merchandising, and digital products and subscriptions. It provides industry-standard functionality across most criteria that we evaluated. Adobe Commerce is weaker in customer success and support, architecture, and extensibility and integration tools. Reference customers told us they are happy with their relationship overall, but they also felt they were not informed of the roadmap and did not feel confident that Adobe brings innovation to them proactively. Adobe is a best fit for brands that are serious about their direct-to-consumer strategy.

- **Salesforce is still a brand favorite, but its focus isn't on its B2C Commerce Cloud.**

Based in San Francisco, California, Salesforce is known for its Customer 360 strategy that unifies its vast portfolio around a single mission. For this report, we evaluated the B2C Cloud Commerce solution. We observed a focus on integrations and acquisitions over B2C commerce innovation, and occasionally a high price tag. Salesforce's biggest strategic strength is in its partner ecosystem. It is weaker in its performance and innovation roadmap, where its B2C solution has not enjoyed the same treatment as its B2B sibling. B2C Commerce Cloud is not on the Lightning experience and is not as tightly tied to the vendor's new order management system. Its roadmap features further decoupling of its solution into microservices, a focus on AI-led personalization and other experiences, and a new marketplace capability from the



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want a long-tenured, well-established solution.

- Shopify Plus has a massive customer base but struggles with enterprise buy-in.** Based in Ottawa, Canada, Shopify is known for its meteoric rise to prominence and its exceptional ease of use for nontechnical practitioners. Shopify has strengths in its partner ecosystem and commercial model, with a massive app store and worldwide network of independent developers, plus predictable and transparent pricing for the commerce solution. Its payment processing costs may be less competitive, but to sweeten the deal, it offers the benefits of Shop Pay and saved personal data across Shopify stores. It has some weakness in its supporting products and services, though it has announced a point of service (POS) solution as part of its portfolio. Shopify's roadmap promises feature enhancements to functions such as search and deeper multichannel support. Shopify Plus has strengths in practitioner UX, third-party channels, and extensibility and integration tools. It has weaknesses in architecture, product catalog management, content management, and search and merchandising. The enterprise customers we speak with that experiment with Shopify Plus do so to test new brands or markets without the commitment, cost, or heavy lift of a typical enterprise solution. However, we do not see enterprise digital businesses replacing their primary commerce solution with Shopify Plus. Shopify is a best fit for digital businesses that need a quick, light, and extremely usable solution, with an extensive app store but significant functional limitations versus its enterprise peers. Shopify declined to participate in the full Forrester Wave evaluation process; this assessment is based on publicly available information.

## Contenders

- Optimizely has appealing plans, but the jury is still out on executing against those plans.** Based in New York City, Optimizely is known for being a roll-up that started as Episerver and continues to grow by acquisition into a commerce portfolio company. For this report, we evaluated its B2C commerce solution. Optimizely was on par with others in most of the strategy criteria but is weaker in performance. The company is focused on harmonizing more of the products across its portfolio while maintaining some acquired functionality as a separate solution (e.g., Optimizely Web, formerly the standalone A/B testing solution). Its roadmap features tough-to-execute behind-the-scenes work to harmonize the data its products act on, while updating and unifying the administrative experience. It also has plans for a promotions overhaul and architectural modernization. Optimizely is strong in multisite and customer success and support. It has weaknesses in practitioner UX, promotions management, and architecture. Overall, reference customers feel they have very positive relationships with the vendor. They would like to see more proactive innovation, as well as stronger AI and personalization tools. Optimizely is a best fit for businesses at low to intermediate digital maturity that value a tight relationship with their vendor.
- VTEX is expanding into new markets but faces some growing pains.** Based in London, UK, VTEX folds in marketplace management with commerce. It went public in July 2021 and has recently begun to succeed in its mission to gain a foothold in markets outside Latin America. VTEX is on par with others in many strategy criteria but has weaknesses in its partner ecosystem and supporting products and services, as its reach and portfolio are still somewhat limited. Its roadmap includes enhancements to personalization across many functions and a focus on promotions, B2B, and conversational commerce. VTEX is strong in digital products



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## Challengers

- SAP has a broad set of well-established features in a monolithic architecture.** Based in Walldorf, Germany, SAP is known for its pervasive installed base with some of the largest global B2C businesses. SAP is below par compared with others in most of the strategy criteria but was on par in its partner ecosystem. The solution's biggest strength is the loyalty of its implementation and service providers. SAP's roadmap features continued promises of breaking the monolith to get to a modern SaaS architecture. Until that time, SAP's architects plan and execute manual upgrades of customer environments annually. SAP has strengths in multisite and product catalog management. It has weaknesses in architecture, extensibility and integration, and customer success and support. Customers we speak with often struggle with an exit strategy from their legacy SAP commerce solution due to the complexity and cost of upgrading or replacement. SAP is a best fit for highly complex B2C enterprises that have a significant investment in SAP CRM and ERP and have not yet adopted modern architecture. SAP declined to participate in the full Forrester Wave evaluation process; this assessment is based on publicly available information.

## Evaluation Overview

We evaluated vendors against 27 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 experience layer, search and merchandising, reporting and analytics, customer management, order and inventory management, product catalog management, price management, promotions management, third-party channels, customer success and support, practitioner UX, architecture, and extensibility and integration tools.
- Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, innovation roadmap, performance, supporting products and services, partner ecosystem, and commercial model.
- Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of customers and product revenue.

### Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: Adobe, BigCommerce, commercetools, Kibo Commerce, Optimizely, Salesforce, SAP, Shopify Plus, and VTEX. Each of these vendors has:

- Substantial B2C product revenue.** Each vendor has at least \$20 million in B2C product revenue.
- Strong support for B2C commerce.** These vendors natively provide all core functions of a B2C commerce solution and have recent and ongoing adoption among large manufacturers and distributors with direct and indirect routes to market.
- 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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## 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 February 8, 2022 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™ And New 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.

