

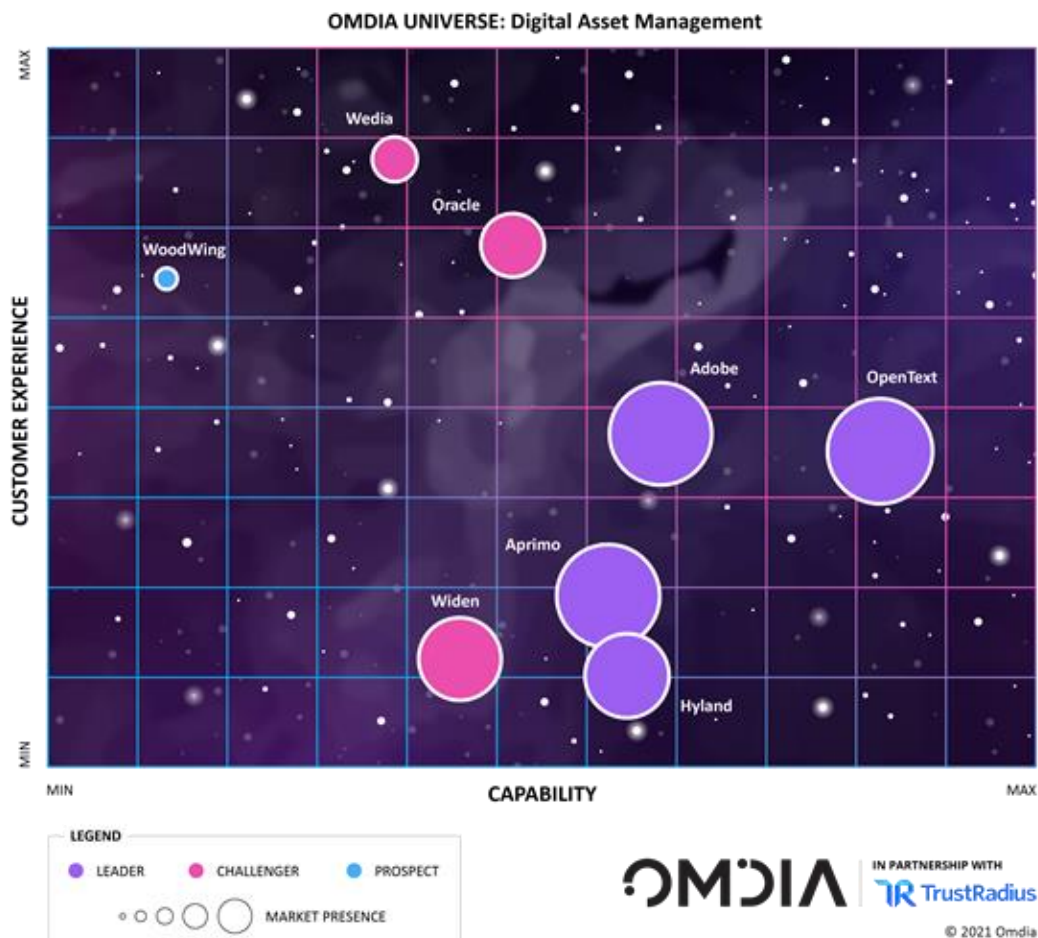
Selecting a Digital Asset Management Solution, 2021–22

Summary

Catalyst

Due to the COVID-19 pandemic, enterprises have been forced to significantly change the way in which they interact with customers. Many businesses have had to move from being predominantly bricks-and-mortar-based, to trading largely online—an area that was already hugely competitive. For retailers, this has resulted in real challenges in creating engaging, highly personalized experiences delivered through multiple channels.

Figure 1: The Omdia Universe for digital asset management



Source: Omdia

Omdia view

Enterprises have needed to become much more creative in how they use digital assets, particularly when viewing products in person is not possible. This has resulted in many enterprises accelerating digital transformation initiatives to modernize legacy systems to become much more agile and adapt to changing circumstances much faster. Digital asset management (DAM), as a dedicated system for storing digital assets, is an important element of digital transformation, particularly as many enterprises are facing exponential growth in the number of assets they need to manage. This Omdia Universe will help the CMO, CIO, and business managers select the DAM platform that provides the capabilities they require to help them fulfill their digital transformation strategy.

Enterprises face a number of challenges as they adapt to conducting a higher proportion of their businesses through digital channels. Many have legacy systems with digital assets stored in multiple, siloed systems, with disparate teams unable to share assets, often resulting in different branding being used by each team with no standardized brand guidelines, and an inability to share and reuse assets. This results in poor content that takes too long to create, requires extensive input from creative teams, and is out of date almost as soon as it is published. This is occurring at the same time that digital assets are playing a much more important role in selling products with face-to-face interactions more difficult. It is no longer sufficient to use a simple photograph to show off a product, as potential customers want a 360-degree view, and video is also proving popular with consumers as a medium for showcasing products.

However, there is a second aspect to using digital assets, which is vitally important in helping to gain competitive advantage, yet it is an area that is often ignored, and this is gaining insights into how and where assets are being used and how effective they are in driving sales. This is where a good DAM solution can come into its own by providing these insights and enabling enterprises to view where their assets are being used and how many views they are receiving, enabling marketers to assess the effectiveness of marketing campaigns. This can be one of the differentiators between a standalone DAM solution and a lightweight solution that forms part of a digital experience management (DXM) platform.

Key messages

- DAM has become much more important during the pandemic as enterprises have been forced to swap face-to-face interactions with customers for digital ones, resulting in greater use of digital assets.
- AI and automation are emerging technologies in the DAM space, and a major differentiator is how AI is being applied by vendors to automate mundane tasks.
- Acquisitions are continuing in the DAM space, with Hyland acquiring Nuxeo, and Acquia set to acquire Widen.

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- Most DAM vendors are cloud-first, and many are cloud-only; therefore, deployment models are an important consideration when selecting a DAM solution.
 - Adobe, Aprimo, Hyland, and OpenText are leaders in this Omdia Universe because they have extensive capabilities across all areas of their platforms.
 - Oracle, Wedia, and Widen are challengers, but they all have the potential to become leaders by adding a few extra capabilities.
 - WoodWing is a prospect, but its capabilities will satisfy many enterprises, and it should still be considered (depending on requirements) as common feedback is that more extensive platforms tend to have more complex implementations with a greater level of professional services required.
 - Omdia's *ICT Enterprise Insights 2020–21* shows that enterprises are reducing budgets at the same time as they are accelerating digital transformation initiatives, resulting in a need for value for money and rapid RoI in any investment in DAM.

Analyzing the digital asset management universe

How to use this report

The Omdia Universe report is not intended to advocate an individual vendor, but rather to guide and inform the selection process to ensure all relevant options are considered and evaluated in an efficient manner. The report findings gravitate towards the customer's perspective and likely requirements, characteristically those of a medium-large multinational enterprise (5,000+ employees). Typically, deployments are considered across the financial services; technology, media and telecoms (TMT); and government sectors on a global basis.

Market definition

Omdia has defined DAM as being the technologies and tools required to store and manage digital assets, including images, video, audio, and documents that are used for creating engaging customer experiences. The capabilities required to achieve this include repository and management capabilities; artificial intelligence (AI) and machine learning (ML); collaboration; asset management; metadata, tagging, and classification; workflow; search; governance and security; integration; and cloud:

- **Repository and management capabilities.** The features and functions provided for managing assets throughout their lifecycle within the repository from ingestion to retirement and archival.
- **AI/ML.** The extent to which AI is embedded throughout the DAM solution. The ability to apply AI/ML to tasks such as auto-tagging and classification, speech-to-text capabilities, facial recognition, color recognition, and asset recommendations.
- **Collaboration.** How users can collaborate on and share assets, perform project-based work, and share assets with external agencies.
- **Asset management.** The capabilities that are included for managing different types of assets, including video, 3D, and animations, as well as analytics capabilities and how the use of assets are tracked.
- **Metadata, tagging, and classification.** The management and methods of creation of metadata, how assets are tagged and classified, as well as indexing methods, are covered in this category.

- **Workflow.** Features and functions required for building workflows to manage the lifecycle of assets, including workflows provided out-of-the-box.
- **Search.** The ability to locate assets in the DAM repository as well as across the enterprise and in a wide range of external repositories, including those that are cloud-based.
- **Governance and security.** Features and functions included that help ensure that assets—including licenses and copyright—are secure and managed appropriately.
- **Integration.** The methods by which the DAM system can integrate with other applications are detailed in this category, particularly in allowing users to access assets in the DAM from within other applications. It includes the availability of pre-built connectors to common third-party applications, including analytics and AI tools as well as creative applications.
- **Cloud.** The various options for cloud deployment are covered in this category, including the various cloud options available; which public clouds are supported; how the services are licensed and priced; the ease, cost, and speed of migrating content to the cloud; and cloud security.

Market dynamics

The importance of the DAM market is reflected in its makeup as it comprises a large number of specialist vendors as well as DXM vendors that have extensive standalone DAM capabilities, often as a result of acquisitions made in the past. Hyland, best known for its flagship content services platform OnBase, is a new entrant to the market, having acquired open-source vendor Nuxeo, who has a content services platform as well as a DAM solution, earlier in 2021. As this Omdia Universe was nearing completion, it was announced that Acquia, an open-source DXM vendor whose product is built on the Drupal platform, has made a definitive agreement to acquire Widen. If the acquisition is successful, it has the potential to change the dynamics in the DAM market, as more DXM vendors with weak DAM capabilities may follow suit and acquire specialist DAM vendors to bolster their own portfolios.

There is little to differentiate vendors in terms of core functionality, and while all vendors are embedding AI/ML capabilities into their solutions, it is the extent to which they have achieved this that provides a differentiator. There are two approaches to deploying AI in DAM. The first is to develop native capabilities or acquire an analytics and AI vendor, and the second is to integrate with third-party AI tools, most commonly those offered by the cloud providers Amazon, Microsoft, and Google, and use their capabilities. The approach that is taken can impact vendors' ability to innovate in the AI area, as those integrating with a third-party solution are often tied to the capabilities offered by the third-party vendor, whereas a vendor that has developed its own AI capabilities in-house (or through acquisition) has the freedom to be much more innovative, so this should be an important consideration when selecting a DAM solution.

Another way that vendors are differentiating themselves is by adding extra capabilities to their products. Some offer a product information management (PIM) solution, while others provide some marketing capabilities. Out-of-the-box connectors and integrations are also an area of

differentiation, with some vendors providing hundreds of connectors while others only provide a few. Again, it is important to consider what products the DAM needs to connect with, and whether the vendor is able to supply the necessary connectors natively as part of the solution. Integration capabilities should extend to the ability to embed features of the DAM into other applications, allowing users to work with assets from the DAM without leaving the applications they work with. Popular integrations include Adobe Creative Cloud applications such as Photoshop and InDesign.

Figure 2: Vendor rankings in the digital asset management Universe

Vendor	Product(s) evaluated
Leaders	
Adobe	Adobe Experience Management Assets
Aprimo	<ul style="list-style-type: none"> ▪ Aprimo Digital Asset Management ▪ Aprimo Productivity Management
Hyland	Hyland Nuxeo Platform LTS 2021
OpenText	<ul style="list-style-type: none"> ▪ OpenText Media Management CE 21.3 (core DAM product) ▪ Media Management Digital Hub ▪ Media Management Adaptive Media Delivery ▪ Accelerated File Transfer ▪ Rich Media Analysis ▪ Media Management Connector for Adobe Creative Cloud ▪ OpenText Hightail ▪ OpenText Magellan
Challengers	
Oracle	Oracle Content Management 21.6.1
Weida	Wedda 2021.4
Widen	Widen Collective
Prospects	
Woodwing	<ul style="list-style-type: none"> ▪ WoodWing Assets 6.69 ▪ WoodWing Connect ▪ WoodWing Swivle ▪ WoodWing Studio

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Source: Omdia

Market leaders

Adobe is a leader because it is strong in all capability areas, and is one of the more innovative vendors, particularly in AI/ML where it benefits from its AI/ML framework: Adobe Sensei. Some of

its strongest areas are AI/ML; metadata, classification, and tagging; and governance and security. A major competitive advantage is the fact that many creative teams use products from Adobe Creative Cloud—its creative tools portfolio—which makes it ideal for agencies as well enterprises across a wide range of industries and sizes ranging from large brands to smaller companies. As a leading DXM vendor, it is also well suited to enterprises that prefer to deploy a DXM platform with fully integrated DAM capabilities. To remain a leader, Adobe must keep innovating and ensuring that as new AI capabilities are added to Sensei, they are made available to Adobe Experience Management Assets.

Aprimo is a leader due to its strength across most capability areas, including metadata, tagging, and classification; workflow; and search. It is a software as a service (SaaS)-based solution that also includes productivity management, and plan & spend in the portfolio, allowing enterprises to manage projects, plan budgets, and monitor the costs of assets. It is suited to enterprises across a wide range of vertical industries, but target markets are retail and consumer goods, manufacturing, life sciences and healthcare, and financial services. Aprimo needs to ensure that it keeps extending its capabilities and should consider offering additional cloud platform options to maintain its position as a leader.

Hyland is strong across most areas, including AI/ML; metadata, tagging, and classification; and governance and security, making it a leader. It is a new entrant to the DAM market, having acquired the open-source content services vendor Nuxeo, which also had a DAM offering in its portfolio. Hyland is unique in this Universe as it has a number of content services platforms in its portfolio but no DXM system. This has enabled it to take an enterprise-wide approach to DAM, rather than focusing it simply on sales and marketing. It is suited to enterprises across all industries, but particular targets are the consumer products, retail, and manufacturing industries. In order to maintain its position as a leader, Hyland needs to ensure that any work that is required to fully integrate the Nuxeo products into the wider Hyland portfolio does not detract from further product developments and enhancements of Nuxeo DAM capabilities.

OpenText is a leader due to its strength across all areas, including repository and management; metadata, tagging, and classification; and workflow. It has a large portfolio of products, including DXM, which enables it to support enterprises across a wide range of sales and marketing operations which would suit companies that want a single solution for DXM and DAM. It is applicable across all vertical markets and has partnerships with Salesforce and SAP. It is also looking to extend its footprint into the mid-market through partnerships with resellers. OpenText needs to ensure that it keeps innovating, especially in the area of AI where it would be advantageous to integrate more capabilities from Magellan in order to remain a leader.

Market challengers

Oracle is a challenger because it is strong in many areas, including metadata, tagging, and classification; AI/ML; and search. This is an achievement for Oracle because it has completely rebuilt its content management portfolio, including its DXM offering and its content services platform, and this is the first time that its DAM capabilities have been treated as a standalone entity. While it lacks a few capabilities, some of which are already on the roadmap, its existing functionality will suit a wide range of enterprises. It is particularly suited to enterprises across all vertical markets that already have Oracle products implemented, particularly in the areas of DXM, marketing automation,

and e-commerce. Oracle has a strong roadmap, and if it can execute on all of its planned enhancements and deliver a few more capabilities to plug existing gaps in its functionality, then there is no reason why Oracle should not become a leader in the future.

Wedia has strong capabilities across most areas, including search; repository and management; and metadata, tagging, and classification which makes it a challenger. It recognizes the importance of digital assets in providing personalized content and supporting the customer journey across all channels making it well suited to enterprises that rely heavily on using digital images in their marketing initiatives. It is applicable across all vertical markets and a viable option for enterprises that want a SaaS-based solution. In order to become a leader, Wedia should consider developing a marketplace for the easy sale and exchange of connectors, which many of its competitors already have, as well as providing support for enterprises that are struggling to ensure compliance in the use of assets through training courses and materials.

Widen achieves its status as a challenger due to its strength across most areas, including metadata, tagging, and classification; search; and governance and security. It has a single platform—the Widen Collective®—that provides brand management, marketing resource management (MRM), and PIM capabilities as well as DAM. It is cloud-only, built on AWS, making it particularly well suited to enterprises that are already running other applications on AWS. The solution is highly scalable, with some clients having millions of assets to manage. It is applicable across all vertical industries. Widen can strengthen its position and become a leader by addressing some of its weaker areas, for example, by adding a few additional AI-enhanced capabilities such as facial recognition or speech-to-text. It should also consider a marketplace for the sale of connectors as a means for increasing the number of connectors available, as many of its competitors also have this facility. In addition, it needs to ensure that its acquisition by Acquia does not provide a distraction from future development of the product.

Market prospects

WoodWing is a prospect in this Omdia Universe because it is missing a few of the capabilities of other vendors. However, this does not mean that enterprises should write off WoodWing as a viable option. It has some very large brands as customers and offers a wide range of capabilities that will suit the requirements of many enterprises. Its strongest areas are metadata, tagging, and classification; workflow; and search. It offers WoodWing Swivle; an entry-level DAM that provides a simplified solution for marketers that do not require the complexities of the full version. It provides two solutions—WoodWing Assets and WoodWing Studio—allowing users to plan, create, manage, and distribute content. In order to become a challenger, WoodWing needs to add extra capabilities, particularly around AI (where it does not currently use AI in analytics), which would enable it to analyze how assets are being utilized.

Market outlook

The DAM market is growing rapidly, which has been helped by the COVID-19 pandemic accelerating digital transformation initiatives, which includes investments in DAM systems. According to the *Omdia ICT Enterprise Insights 2021* survey, a quarter of enterprises plan a major investment in web content management, imaging, and DAM technology in the next 18 months, with a further 32.4%

planning a minor investment. Furthermore, Omdia's *Software Market Forecast: Information Management, 2018–23* forecast that the content management market, which includes DAM, was set to be worth \$20,357m by the end of 2020, growing to \$27,119m by 2023, proving that there is plenty of market share available for DAM vendors.

At the same time that enterprises are pushing forward with digital transformation, they are also reducing budgets, again as a result of the pandemic. Omdia's *ICT Enterprise Insights* shows that just under 45% have decreased budgets in 2020–21. This means that enterprises are having to do more with less, resulting in them having to carefully consider where their priorities lie when it comes to budgetary spending. However, the use of digital assets has taken on new importance in the last 18 months, with many enterprises having to manage millions of assets, which means more enterprises are implementing standalone DAM solutions rather than relying on lightweight solutions built into DXM platforms.

Cloud is playing an increasingly important role in DAM, with many solutions now cloud-only. Cloud take-up has traditionally been slower in the content management space than other technology areas, but the fact that DAM vendors have the confidence to offer SaaS-only solutions shows that uptake is increasing. The majority of DAM vendors are now cloud-first, but some offer a range of deployment options, including on-premises private clouds. Omdia expects cloud take-up to increase over the next few years as enterprises update their DAM solutions to embrace the latest technologies, and vendors abandon on-premises software solutions as an option.

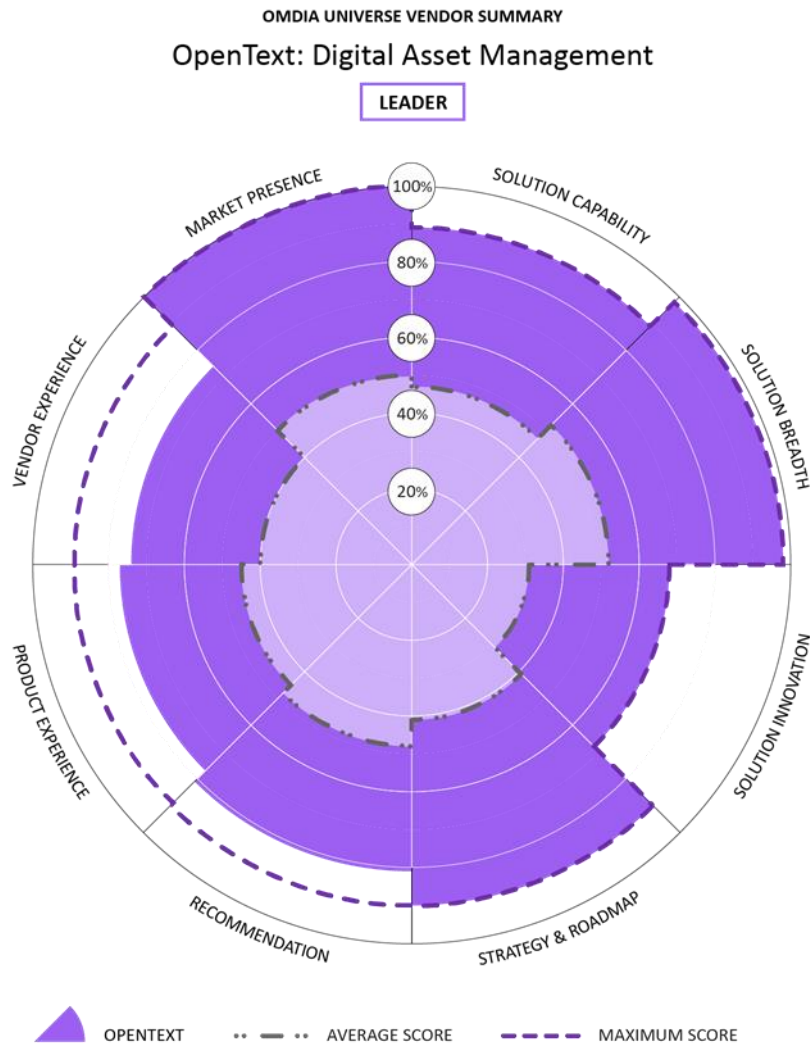
Vendor analysis

OpenText (Omdia recommendation: Leader)

OpenText should appear on your shortlist if you are a multinational enterprise that runs distributed operations across national, linguistic, and regulatory borders using images, video, and audio

OpenText is a vendor that includes a DXM platform—OpenText Experience Platform—in its portfolio, of which its DAM solution, OpenText Media Management (OTMM), is a core component. Therefore, many of its DXM customers will also deploy Media Management for their DAM capabilities. This makes it difficult to estimate its size as a DAM vendor in terms of revenue. Media Management is supplemented by a number of other OpenText products, including OpenText Hightail, which is a SaaS platform for file sharing and creative collaboration with built-in connectivity to Media Management, and OpenText Magellan Business Intelligence and Reporting, its data collection and visualization service, which is now included with Media Management. Flexible deployment options are available, enabling enterprises to purchase a software license and deploy it anywhere or sign up to a managed service subscription with OpenText Cloud. Further options provide a choice between a highly customizable virtual machine (VM) distribution or an easily upgradable and API-first containerized distribution. All options provide the same features and functions.

Figure 6: Omdia Universe ratings—OpenText



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Source: Omdia

Strengths

OpenText’s strongest areas are the DAM repository and management, metadata, tagging and classification, and workflow. Its repository and management capabilities are extensive. It provides support for a wide range of storage types such as file system (local network-attached storage (NAS) and storage area network (SAN)), cloud storage with native support for AWS S3, Azure BLOB, and Google Cloud Object storage, as well as NetApp StorageGRID which can reduce the cost of object storage for on-premises deployments. Customers can move assets between storage locations based on criteria such as views, downloads, and updates as well as asset file types, using storage business rules to reduce costs by keeping the most accessed assets on fast storage while moving less used

assets to lower-cost cloud or archive storage. Several methods of importing assets into the repository are available, including drag-and-drop, accelerated file transfer (which allows fast transfer and supports large file sizes), and an OTMM Adobe CC Connector supports the import of Photoshop images, as well as InDesign and Illustrator layouts from a panel within the Adobe Creative Cloud application. The Asset Importer allows larger volumes of assets and metadata to be imported using a spreadsheet, as does the Bulk Ingest utility, which allows assets and metadata to be ingested from a network storage location. In terms of access to assets, OpenText Media Management Digital Hub allows access to asset collections as branded multi-page microsites with composition capabilities that support site color schemes, pages, adding logos, hero images, video covers, and content-sensitive search filters, preview, and publishing microsites for public or authenticated consumer users. OpenText uses virtual folders to group assets into user-generated collections. The benefit of this approach is that all folders are virtual, which avoids the duplication of assets that are used in multiple projects, campaigns, or processes.

Metadata, tagging, and classification features include several options for importing or adding metadata. In addition to adding metadata manually, it can be imported from external applications or data sources such as a PIM or an external database using integration capabilities. Tabular metadata can also be uploaded as part of a bulk edit function. Metadata fields can be free text, domain lists, cascading, or tabular. Relationships can be created between fields so that a change in one field causes changes in others, such as a status change. Auto-tagging, classification, and captions are supported on ingestion, which are powered by AI. Tagging and metadata enrichment continues throughout the asset's lifecycle. Assets are also indexed on ingestion as well as when an asset changes. Multilingual metadata is supported so that values in multiple languages can be added against a single field. Media Management is integrated with Magellan BI and Reporting, and included are system, asset, and usage reports and dashboards; for example, assets by type, top downloaded assets, top assets using the most space, and many other reports on login, search, upload, and other activities.

Workflows can be created using the Job Modeler tool, which has a graphical design interface and includes actions such as import, export, create folders, create collections, update metadata, move assets, evaluate metadata, review, and approve assets. System workflows to support jobs for import, export, check-in, smart crop, and other default actions are included. Samples of other jobs are provided, enabling users to configure additional workflows that support their own business requirements. A full audit trail is provided of all workflow actions, and these can be reported on. Reports provided out-of-the-box include user activity, storage assets, and search keywords. Out-of-the-box integration with OpenText Hightail allows a Hightail workflow to manage the process of users adding assets into Media Management repository directly from Hightail, and deliver assets from the repository to external agency users. Workflows can also be created that add assets to a Collection that can be published as a Digital Hub microsite, which is accessible to an external agency.

Limitations

A limitation for OpenText could be perceived to be the fact that it integrates with third-party AI tools instead of using its own capabilities. Options include Microsoft Azure, Google Vision, and AWS Rekognition for image and video analysis. Other AI providers can be added using the included Rich Media Analysis (RMA) framework. Assets are sent to the selected AI provider, and the returned tags are added to the assets' metadata with confidence levels. These AI tools need to be licensed directly

from the third-party vendor. However, each AI provider has its own strengths, and many are regarded to be top-tier vendors, enabling enterprises to adopt a best-of-breed approach. While this option may suit many enterprises that have either already deployed these tools elsewhere in their businesses or prefer a best-of-breed approach, it will not satisfy enterprises that wish to adopt a solution from a single vendor, and OpenText should consider adding its own AI tools as an option. It already offers OpenText Magellan RiskGuard to provide content moderation by identifying content that has the potential to cause brand damage or breach regulations.

Opportunities

With a large portfolio of products, including Content Services and DXM, OpenText has a strong opportunity to increase its share of this lucrative market through cross- and up-sell opportunities across a wide range of industries and business types. It is particularly well suited to address the requirements of multinational enterprises that are finding new uses for rich media within their organizations. As an ECM vendor, OpenText has the opportunity to integrate DAM into different parts of the enterprise to manage new use cases.

Accelerated digital transformation initiatives also provide an opportunity as enterprises rush to implement the solutions required to enable them to provide personalized, engaging experiences to customers with fewer opportunities for face-to-face interactions. In this regard, the fact that OpenText also has a DXM platform is an advantage as a tightly integrated portfolio that can be implemented as a single solution can often be achieved faster than adopting a best-of-breed approach.

Threats

A threat for OpenText comes from the large number of competitors in the DAM area, including specialist vendors and other DXM vendors. As its DAM is tightly integrated with its DXM, and many of its customers use both products, OpenText is not associated as being a DAM vendor to the extent that specialist vendors are, and there is a risk that enterprises will omit OpenText from their shortlists when considering a DAM. This would be a mistake as Media Management has some of the most extensive and innovative features of any DAM assessed in this report.

Another threat for OpenText is the fact that it is often considered to be a high-end and therefore an expensive vendor, which will deter many smaller companies from considering it. OpenText is making the solution more attractive to a wider range of organizations through OpenText Media Management Digital Hub, which is an entry point lightweight version of Media Management, which supports the creation of targeted asset distribution of content managed within OpenText Media Management and is also suited to ad hoc and occasional users. OpenText's choice of cloud options is also making Media Management attractive to a wider range of enterprises.

Methodology

Omdia Universe

The process of writing a Universe is time-consuming:

- Omdia analysts perform an in-depth review of the market using Omdia’s market forecasting data and Omdia’s ICT Enterprise Insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on their current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- Analysts derive insights on the customer experience with each solution via reviews and ratings on TrustRadius.
- The Universe is peer-reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

Vendors had to meet certain criteria to be considered for the *Omdia Universe: Selecting a Digital Asset Management Solution 2021–22* report, which was as follows:

- The solution provides a solution for digital asset management, where all of the core functionality can be accessed and managed through a single interface.
- The solution must be capable of being deployed standalone, without any reliance on other solutions within the vendor’s portfolio.
- Each digital asset management system has to be capable of being deployed in the cloud and preferably be cloud-native.
- The products have a significant level of recognition among enterprises, cover a range of verticals, and have a presence in multiple geographies

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- The vendors must provide or include the ability to integrate the solution with a wide range of third-party applications, including content management platforms, DXM platforms, and PIM applications.

Appendix

Further reading

Fundamentals of Digital Experience Management 2020 (September 2020)

Omdia Universe: Selecting a Digital Experience Management Solution, 2020–21 (September 2020)

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Omdia consulting

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