

Global Content Management System (CMS) Market: Analysis By Deployment (Cloud and On Premise), By End User (IT & Telecommunications, Energy & Utilities, Government & Public Sector, Healthcare & Life Sciences, Retail & Consumer goods, Manufacturing, BFSI and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

Content management system (CMS) market is associated with provision of software solutions by entities (organizations, sole traders and partnerships) that enable users to create, manage, and publish digital content, such as text, images, and multimedia, without the need for extensive technical knowledge. CMS solutions are mainly designed to help businesses, organizations, and individuals create and manage content for websites, mobile apps, and other digital channels. The global content management system market was valued at US\$19.05 billion in 2022. The market value is forecasted to grow to US\$27.48 billion by 2028.

There are around 1.13 billion websites in the world as of January 2023, of which ~199mm are considered active websites (defined as responsive websites with unique domains [sub-domains excluded] that contain unique content and structure). This is consistent with the ~200mm active websites cited by Wix as of 2021. Within this large number of active websites globally, ~27% of them have been built with a content management system (CMS), with ~10% of the total active websites built with a SaaS CMS (e.g., Wix, Squarespace, Shopify, etc.).

Factors such as rapidly developing e-commerce sector, increasing number of businesses and startups, rising IT spending, growing demand for cloud-based software and applications, rising adoption of BYOD policy, increased focus of companies on online marketing, etc. are expected to drive the overall market growth in the forecasted period. Headless CMS is the new trend in the content management system market, where headless CMS provides flexibility in choosing front-end technology and allows developers to use any programming language and framework to create unique user experiences by providing CMS solutions for a variety of devices, such as websites, mobile apps, smartwatches, and IoT devices. The market is anticipated to grow at a CAGR of approx. 6% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Deployment: The report provides the bifurcation of the market into two segments based on deployment: on premise and cloud. The cloud CMS market is both the largest and the fastest growing segment of the global content management system market owing to the increased flexibility, scalability, and agility associated with cloud-based content management solutions, lower hardware and software installation costs, growing adoption of cloud computing technology, and rise in adoption of work from home culture.

By End User: The report provides the bifurcation of the market into eight segments based on end user: banking, financial services & insurance (BFSI), healthcare and life sciences, IT and telecommunications, government and public sector, retail and consumer goods, energy and utilities, manufacturing, and others. Government and public sector content management system market is the fastest growing segment of global content management system market as CMS platforms are widely used by these industries to improve collaboration and communication within enterprise, comply with accessibility requirements and manage websites, including publishing content, updating information, and managing web design. Also, CMS platforms enable government and public sector organizations to create engaging and interactive websites and e-government services that allow citizens to access information and services easily, increasing accessibility, improving efficiency and reducing paperwork.

By Region: The report provides insight into the content management system market based on the regions namely North America, Europe, Asia Pacific, and Rest of the World. North America content management system market holds the largest share of global content management system market, owing to increasing internet penetration, rising interest of enterprises in web-based marketing, presence of a large number of

small businesses, growing SME expenditures in the SaaS and cloud industry, rising adoption of BYOD policy and increasing focus of companies on building brand awareness among users through multiple digital channels such as social media and mobile platforms. Asia Pacific content management system market in the fastest growing region of global content management system market, owing to increased awareness about importance of managing quality content, rising number of startups and new businesses, globalization, rapidly expanding end user industries, high adoption of digital platforms and reduced prices of services, LCD panels, connectivity and networking equipment in the region.

Market Dynamics:

Growth Drivers: The global content management system market has been growing over the past few years, due to factors such as increasing number of active websites using CMS platforms, rising adoption of cloud computing, increasing application of CMS across various industry verticals, growing usage of mobile devices, increasing E-commerce, etc. Increasing adoption of mobile devices such as smartphones and tablets by users to access content on the go regardless of their location have been incentivizing businesses to demand CMS solutions that prioritize mobile responsiveness, faster loading times, and optimized content for mobile devices. Also, growing use of mobile devices have led to an increased user engagement with features such as touchscreens, swipe gestures, and voice commands, benefitting CMS providers in terms of provision of longer sessions, more shares, & ultimately more traffic for user's website. Therefore, growing usage of mobile devices along with increased internet penetration will continue to boost the growth of global content management system market.

Challenges: However, the market growth would be negatively impacted by various challenges such as data security and privacy concerns, high maintenance cost associated with CMS platforms, etc. Increasing number of security breaches and compliance issues associated with CMS platforms, particularly if they are not kept up-to-date with the latest security patches and updates, makes businesses reluctant to adopt both existing and new solutions that involve data handling or data shifting from one platform to another. Also, digital records are vulnerable to unauthorized access, whether through hacking or lax employee security, which can lead to theft of confidential information, customer information or payment details, along with disruption of business and loss of sensitive data, resulting in significant liabilities for the affected company and reputational harm for CMS providers, further jeopardizing the confidence of customers in the provision of CMS solutions.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as increased integration of artificial intelligence (AI), personalization, headless CMS, rising demand from SMEs, etc. market. AI in content management system is used to understand large amounts of unstructured data, automate routine tasks, and expose patterns by categorizing, classifying, and analyzing content, thereby assisting businesses in making smart marketing decisions and improving overall customer experience. AI integrated CMS also helps in analyzing existing content on a website and generate new content that matches the tone & style of the existing content, saving time & effort and ensuring that the content created is high-quality and engaging. Therefore, increasing integration of AI in CMS platforms for smart content analysis & categorization, automatic image tagging, scalable personalization & predictions, time-saving content creation assistance, content gap identification and on-the-spot SEO improvements is expected to boost the growth of global content management system market in the forecasted years of 2023-2028.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. With widespread adoption of remote work, increase in digitalization, and a sudden shift towards work from home culture in response to lockdown restrictions & social distancing policy imposed by governments of various countries, many enterprises shifted their businesses online, relying heavily on CMS platforms to create, store, capture, manage & distribute unstructured content more efficiently and affordably. Also, lockdown policies imposed by government to prevent the spread of virus facilitated the adoption of cloud-based CMS solutions by companies across various industries to store data in a more secure and remote manner, with cloud-based CMS software eliminating the need for upfront capital investment & IT infrastructure and making website development more secure, user friendly and cost-effective by offering robust set of data security measures like regular backups, disaster recovery, multi-factor authentication, data encryption, access control and auditing and reporting options to ensure data privacy and protection.

Competitive Landscape:

Content management system market is seen to be moderately fragmented with few dominant players holding a significant market share along with the presence of large number of small players and new entrants offering niche WPS platforms and solutions to remain competitive in the market. The key players of the market are:

Wix.com, Inc.

Shopify Inc.

Squarespace, Inc.

Adobe, Inc.

HubSpot, Inc.

BigCommerce Pty. Ltd.

WordPress.org

Webflow, Inc.

Drupal

Open Source Matters, Inc. (Joomla)

WordPress.org currently dominates the market and continues to engage in R&D, innovation and launch of new solutions and updates in order to broaden and strengthen the current portfolios, while attracting new customers. Within emerging players, Shopify Inc., has emerged as a notable share gainer and market leader in both the SaaS CMS and commerce enablement markets, with Shopify having a strong advantage over other CMS providers like Wix.com, Inc. and Squarespace, Inc. in terms of product suite (e.g., embedded finance offerings including Capital and Balances, cross-border solutions such as Markets, B2B solutions, Shopify Fulfillment Network, other offerings from strategic partners, etc., scale and ecosystem (including consumer solutions Shop App and a share-gaining Shop Pay wallet), reputation and mindshare in ecommerce, etc.).

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