storyblok

Enterprise eCommerce Leader Report

2023 EMEA

Table of Content

Introduction

Summary

- WordPress, Salesforce, and Drupal are the most common CMSs in that order. Lower revenue organizations favor WordPress while those on the upper-end favor Salesforce.
- Higher revenue brackets tend to favor using more than one CMS yet generate similar Lighthouse scores to those with a single CMS. This suggests that monolithic CMSs are not versatile enough for larger enterprises and fail to scale.
- The top 5 most popular monolithic CMSs perform poorly when it comes to Lighthouse speed scores and Lighthouse performance scores, ranging from only 14 to 32.6. The result is slow loading times, reaching as high as 13.3 seconds time to interactive.
- Companies that add a second language experience an impressive traffic growth rate on average, and as such users may want to be ready to capitalize on this opportunity with powerful localization and personalization features.

Methodology

Storyblok collected information on 16,396 companies. We then added parameters to make it more precise:

Organizations in the EMEA[1] regions

An employee count of 100 or higher

Revenue ranges above $10 million

[1]*EMEA - Europe, Middle East and Africa*

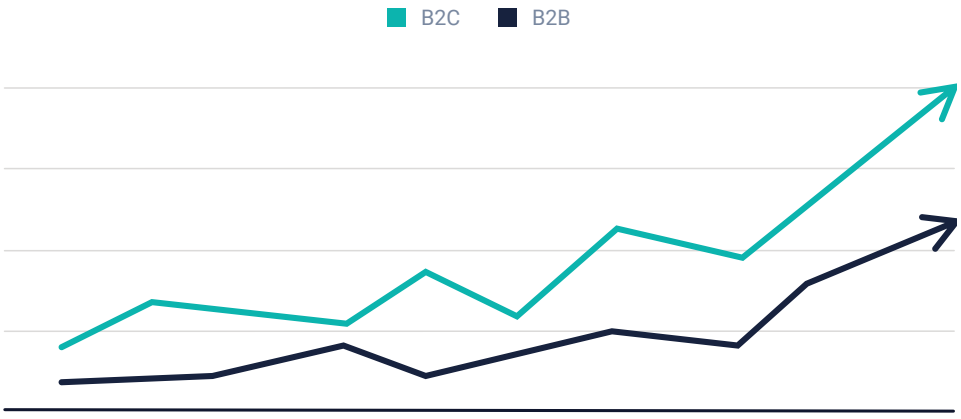
After applying these, the total number of companies came to 3,583. While not every company's data was fully complete, we compared available information to draw statistical conclusions.

It is important to note that this report looks exclusively at monolithic (also known as traditional) content management systems. Monolithic systems operate with a single backend and frontend which are tightly coupled. Headless systems, by contrast, rely on APIs, which allow users to freely connect to many different programs and frontends from a single centralized backend.

The reason this report focuses on monolithic systems in particular is that they still have the majority share of the CMS market despite being outdated. In our State of Content Mangement 2022 report, 50.21% of the 515 respondent sample opted for a monolithic CMS. Many eCommerce platforms still rely on them as well, making them a significant consideration in the CMS field as a whole.

The state of eCommerce: why staying up-to-date is essential in 2023

Technology is an ever-changing field. While this may make staying up to date with trends important, it is not necessarily easy. This is especially true as we emerge into a post-pandemic world: according to the US International Trade Administration, the spike in B2C eCommerce that we saw when the pandemic hit isn't going anywhere. On the contrary, it's set to continue growing well into 2024.



eCommerce sales & size forecast

Traffic may be booming, but that doesn't mean you can ease up on your strategies. You'll be competing with countless other companies to take advantage of this growing number. That means having the most capable system as soon as possible will be key to capitalizing on this opportunity. If you aren't ready, there's a very real chance of you getting left in the dust.

That's where Storyblok comes in. We've collected data on over 3,500 companies to learn how they're evolving to take on the new digital landscape. We looked to see how performance indicators are changing, what the top tech choices for the best-performing organizations are, and how outdated systems can seriously hamper your chances of success.

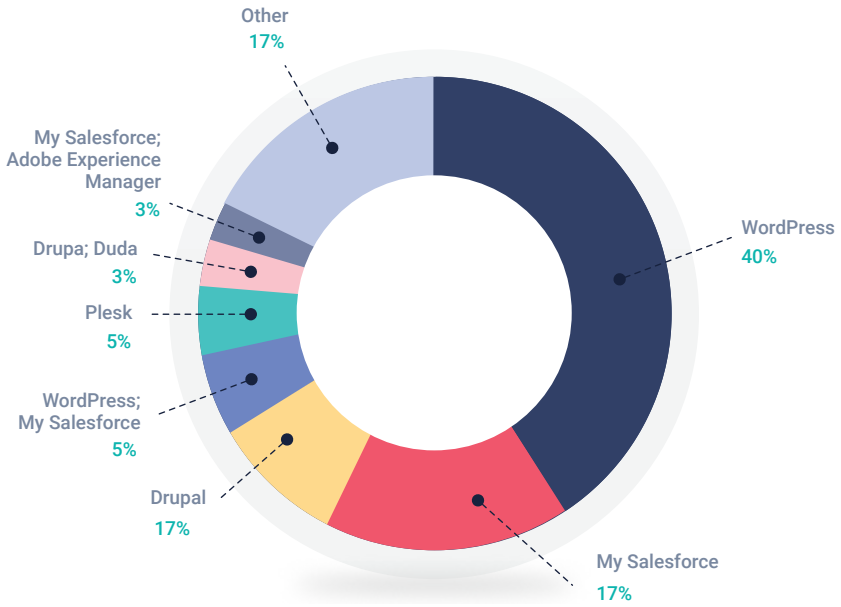
When it comes to eCommerce, it's not enough to merely survive – you need to thrive. By understanding what other companies are doing and how it's impacting their results, you can guide your own organization towards leading the pack in the coming days.

Content Management System (CMS)

General usage of monolithic CMSs in full sample

COMPANY NAME	NUMBER OF USERS	PERCENTAGE OF SAMPLE (ROUNDED)
WordPress	540	40
My Salesforce	229	17
Drupal	123	9
WordPress; My Salesforce	70	5
Plesk	64	5
Drupal; My Salesforce	45	3
My Salesforce; Adobe Experience Manager	35	3
Other	231	17
Not Listed (Not displayed)	2246	not pictured

CMS usage of entire sample



Overall CMS usage of those listed

- **Observations :**
  - WordPress is the most popular CMS, accounting for 40% of the sample
  - In terms of developer team size, WordPress is the most common choice for teams of fewer than 100. However, My Salesforce is the most common choice for all brackets with over 200. They are tied for the 101 – 200 bracket
  - This suggests that My Salesforce has broad appeal across team sizes while WordPress is only popular among smaller teams

WordPress's popularity is not surprising considering that approximately 43% of all known websites use the platform. This may be due to the fact that it's a free, simple option for the considerable number of small businesses that do not need an overly complex system.

This is also reflected in the fact that smaller developer teams are more likely to favor WordPress. Thus, while WordPress is the most commonly used platform, the fact that it is not equally distributed among team sizes suggests that its popularity is due to the large amounts of small businesses using it. The fact that these businesses are not reaching a large number of users may also suggest that WordPress is not generally recognized as a platform that can support enterprise-level performance needs.

General usage of monolithic CMSs by each revenue bracket

	1st CMS CHOICE	2nd CMS CHOICE	3rd CMS CHOICE
$10M-$50M (611)	WordPress	Drupal	Plesk
$50M-$100M (154)	WordPress	My Salesforce	Drupal
$100M-$250M (110)	WordPress	My Salesforce	Drupal
$250M-$500M (57)	WordPress	My Salesforce	Drupal AND WordPress; My Salesforce
$500M-$1B (22)	My Salesforce	WordPress	Drupal AND WordPress; My Salesforce
$1B-$10B (333)	My Salesforce	WordPress	Drupal
+10 BILLION (49)	My Salesforce	My Salesforce; Adobe Experience Manager	Adobe Experience Manager AND Drupal; My Salesforce

Observations :

- The revenue brackets encompassing $10M – $500M prefer WordPress, while those earning above $500M prefer My Salesforce
- It goes the other way around regarding second choices: My Salesforce is the most common second choice for the $50M – $500M bracket, while WordPress is the second most common CMS choice for companies in the $500M – $10B brackets
- Systems using Drupal appear frequently as each bracket's third most common choice

Companies in the lower half of annual revenue choose WordPress frequently, but this trend drops off as revenue increases. This further confirms the findings in the previous graph that WordPress's audience is mostly smaller organizations. Nevertheless, it remains the second most common choice for organizations with larger amounts of revenue, suggesting that it still retains some appeal to those high-earning companies. However, it should also be noted that the +$10B bracket does not show any WordPress users in its top three choices, suggesting there is a limit to how much the CMS can scale.

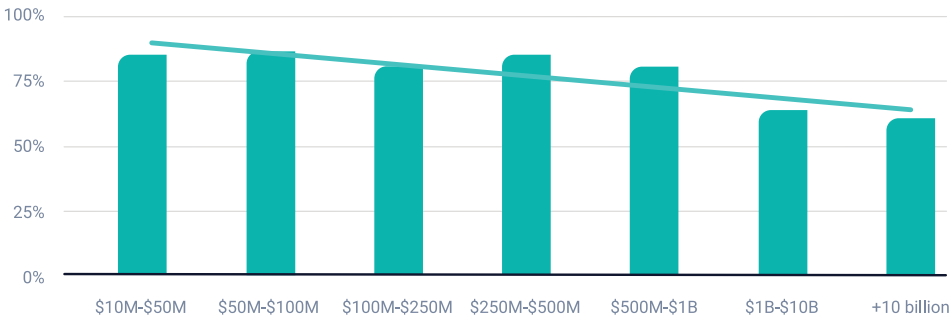
Use of multiple CMSs distribution

	1 CMS	MULTIPLE CMSs
Full sample % using (1337)	80% (1064)	20% (273)

Companies using multiple CMSs vs companies using a single CMS (total)

	1 CMS	MULTIPLE CMSs
$10M-$50M (611)	87%	13% (79)
$50M-$100M (154)	88%	12% (18)
$100M-$250M (110)	82%	18% (20)
$250M-$500M (57)	87%	13% (14)
$500M-$1B (22)	82%	18% (4)
$1B-$10B (334)	65%	35% (118)
+10 BILLION (49)	61%	39% (19)

Companies using multiple CMSs vs companies using a single CMS (by revenue bracket)



Percentage of companies by revenue bracket using a single CMS

Observations :

- As average revenue increases, the number of companies only using one CMS decreases

Organizations with higher amounts of annual revenue tend to be larger in size. Growing companies like these tend to increase their content output to keep up with their growing audience. Doing so to reach the maximum number of users means making content available on multiple channels. Such omnichannel marketing is crucial to a modern organization's content success. However, as monolithic CMSs rely on a simple backend-to-frontend connection, they are not capable of pushing content to more than a single channel. This results in the need to use more than one monolithic CMS to accomplish this fundamental task which, in turn, leads to content silos.

Content silos come with problems of their own. **By segmenting content, they greatly decrease the efficiency and consistency of content strategies**. This is because there's no one control center. This can lead to marketing teams wasting their time editing the same assets across each individual platform, rather than doing it once and having it take universal effect. This lack of consistency can also lead to blind spots in content: there can be areas where topics are not covered because the team thinks they've already addressed it, or on the other hand, duplicate assets as it's hard to tell what's already been done. Monolithic CMSs almost always present these siloing issues due to their limited capacity to communicate with other technologies.

It's not just content either. When it comes to siloed systems, each one's user data will only be relevant for each individual platform. This makes getting an accurate idea of overall content performance extremely difficult. Another technical problem is the ever-important issue of security. Not every platform has the same safety standards, and just like with content, tracking what measures are being taken on which systems can be difficult to track. This can lead to missed maintenance protocols, creating riskier opportunities for hackers to gain access. Moreover, because the structure of monolithic CMSs is closely interconnected, a security risk in one area can very quickly and easily spread to other parts, resulting in a devastating loss of data.

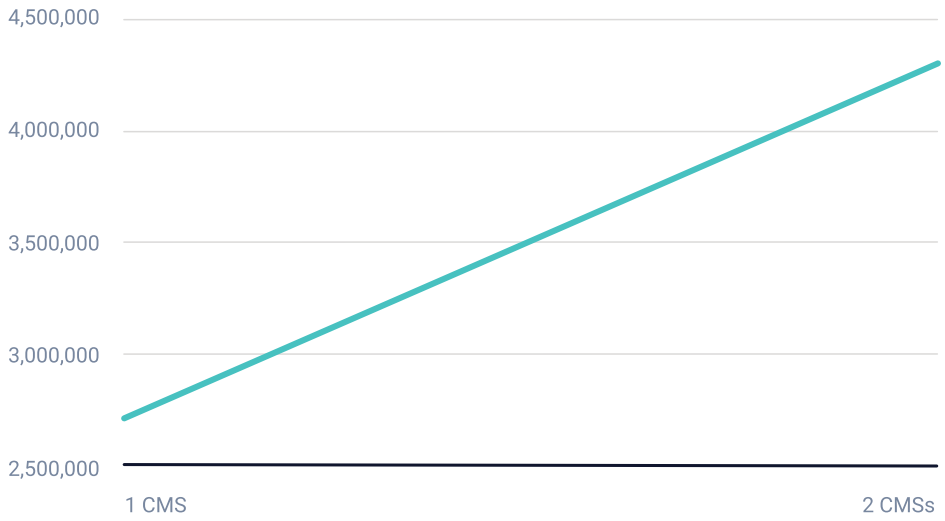
Given these significant challenges with using more than one traditional CMS, **users should seriously consider opting for a headless CMS instead**. Headless CMSs act as content hubs thanks to their ability to use APIs to connect to multiple channels. Thus, marketing teams can edit assets only once and trust that it will have a consistent effect on every platform. Moreover, the interconnected aspect means that teams will be able to accurately gauge the performance of what they produce across their entire user base. This greatly lowers the risk of the aforementioned issues related to content efficiency and data consistency.

Finally, security is also greatly improved by using one headless CMS. That's because teams only need to understand one set of security protocols in order to protect everything they produce. Additionally, this API-first way of building the tech stack acts as a natural defense. This is thanks to the fact that the frontend and backend are separated, so any security threat in one area will be inherently quarantined before it can spread.

Use of multiple CMSs versus average monthly traffic

	AVERAGE MONTHLY TRAFFIC
1 CMS	2,678,933
2 CMSs	4,303,393

Number of CMSs used vs average monthly traffic

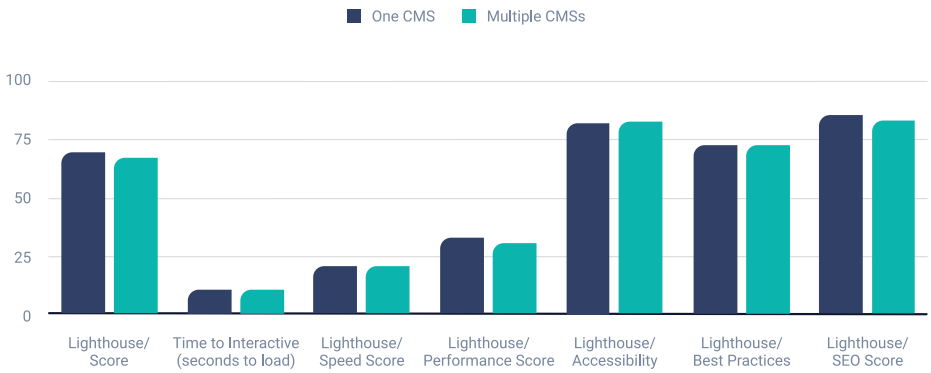


- **Observations :**
  - Organizations experiencing more traffic are more likely to use multiple CMSs, likely in order to support those visits.

As traffic grows, organizations need to invest in more touchpoints so they can reach the broadest possible audience. Monolithic CMSs are naturally isolated, meaning they cannot support multiple channels. As a result, companies appear to opt for multiple CMSs just to handle the extra traffic and more touchpoints This shows that **monolithic CMSs simply aren't capable of supporting a modern omnichannel marketing strategy**. Unfortunately, companies who still opt for multiple monolithic CMSs instead of a single headless CMS must also accept an increasingly siloed content structure and the problems that go with it as the base of their technological ecosystem.

This content siloing strategy leads to a few significant downsides. For example, silos make it hard to track which assets are being used where. This can lead to marketing teams reproducing already created content, making edits that are inconsistent across channels, and missed opportunities to add relevant assets. This kind of disjointed nature also makes maintaining high-quality security protocols and overall user data analysis much more difficult. In short, the lack of a universal backend that is innate to a traditional system leads to an overly complicated and inefficient approach to content creation. Headless systems, on the contrary, avoid such issues thanks to an API-first approach that can connect to multiple touchpoints from a single backend.

Average Lighthouse performance metrics of companies using multiple monolithic CMss versus those using one

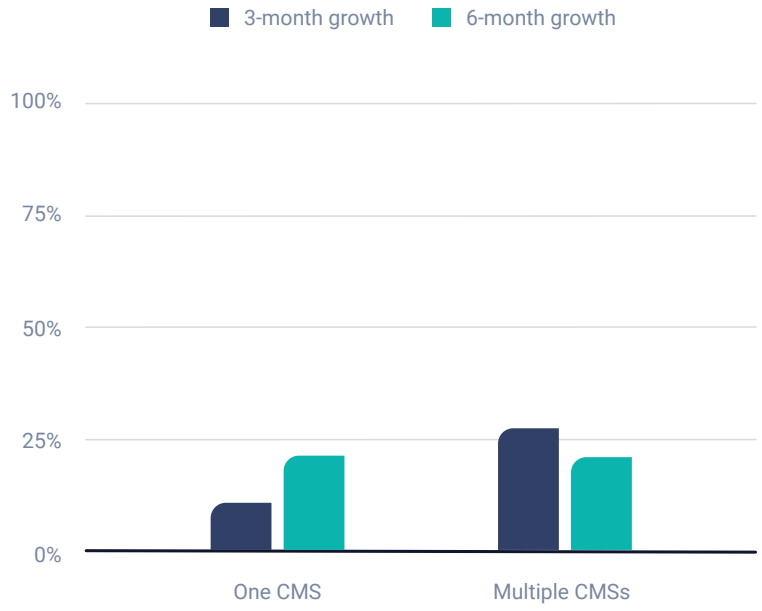


- **Observations :**
  - These statistics are extremely close. Of the 7 categories, 5 of them are exact ties
  - As for bounce rates, single CMS users have 46% while multiple CMS users have 43%
  - Both single CMS and multiple CMS structures demonstrate remarkably poor performance and speed scores.

The differences between each Lighthouse category, bounce rates, and time spent on the site are very subtle. This suggests that companies use multiple CMSs not to increase their scores, but to present the same quality experience to a larger number of users – they are not looking to improve the user experience, but rather to maintain it. This further establishes that using multiple CMSs is merely a necessity for those who want to go beyond the constraints of a single traditional CMS even if it means having to juggle multiple content silos. **Monolithic CMSs cannot support a modern website's needs and adding additional systems does not seem to solve the problem.**

This conclusion is further supported by the results found in the performance and speed scores: **both return very poor results, with the highest average speed score being 21 and the highest average performance score being 30**. Given that both single and multiple CMS set ups share these disappointing results, it's reasonable to conclude that the issue is not with the number of CMSs but with monolithic systems themselves. Adding multiple CMSs is clearly not the solution to improving speed or performance issues, but rather a slightly different version of an insufficient approach.

Use of single or multiple monolithic CMSs versus 3-month and 6-month growth rates

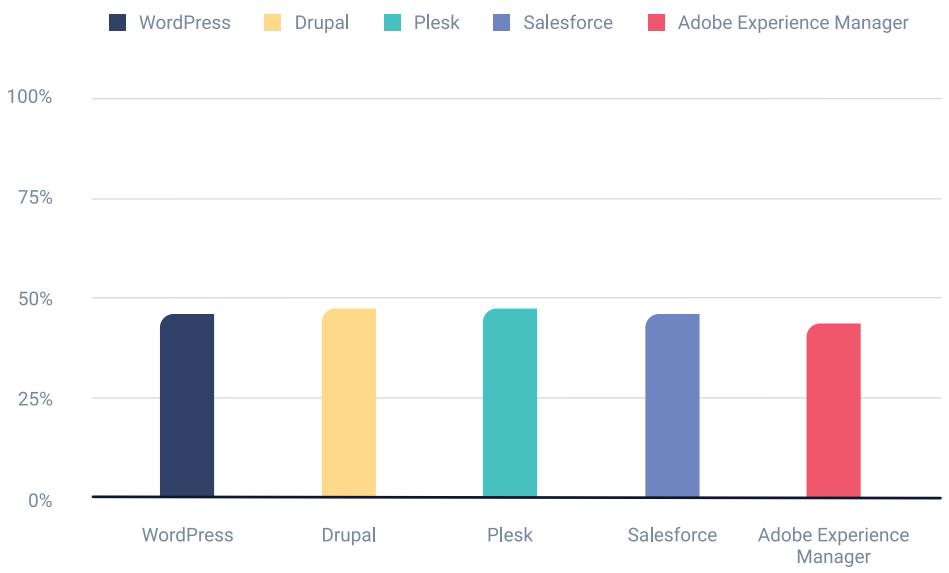


- **Observations :**
  - Multiple CMS companies saw far greater 3-month growth rates (18% higher) with roughly the same degree of 6-month growth rate (1% lower)

One reason for this could be due to different stages in the growth cycle. As covered earlier, fast-expanding organizations likely use multiple CMSs to provide consistent service to a larger audience. Thus, it would make sense that those same organizations experience higher degrees of 3-month traffic growth than their single CMS counterparts. The nearly equal growth rates over a 6-month period suggest that this initial boom eventually subsides, **showing that adding multiple monolithic CMSs does not promise long-term growth**. In today's competitive environment, additional monolithic CMSs are little more than a quick-fix for issues caused by the primary system in the first place. It will not future-proof a business, but rather impose more limits on its content moving forward, feeding into a cycle of trying to solve the same issues over and over again.

Bounce rates of the top 5 monolithic CMSs

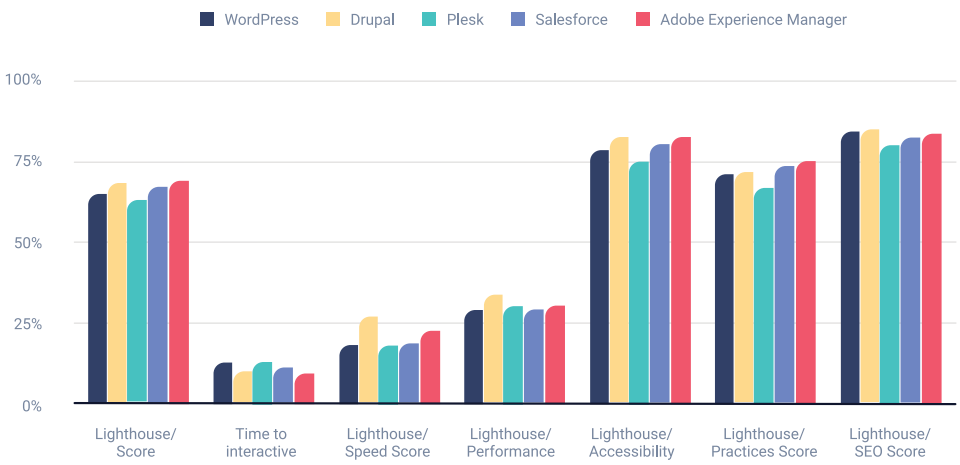
CMS	AVERAGE BOUNCE RATE
Drupal	46.80%
Plesk	46.60%
Salesforce	45.80%
WordPress	45.20%
Adobe Experience Manager	43.40%



Observations :

- Drupal has the highest average bounce rate of the top five most popular monolithic CMSs. Adobe Experience Manager demonstrates the lowest
- While the bounce rate results are similar, none are particularly good, with the lowest average bounce rate being an unimpressive 43.4%
- More than anything, these findings emphasize that the five most popular monolithic systems, despite their differences, all perform poorly when it comes to bounce rates

Lighthouse scores of the top 5 monolithic CMSs



- **Observations :**
  - In terms of Time to Interactive and Performance scores, the top 5 monolithic CMSs perform poorly. The highest average Performance score is only 34.6
  - Drupal leads every category except Time to Interactive and Accessibility
  - Plesk is the worst-performing overall, coming in last for 6 of the 7 categories

Significantly, there are two categories in which every monolithic CMS performs poorly: overall performance and speed. Both of these can lead to a poor user experience. Low performance scores account for aspects such as responsiveness and visual stability.

Compromising either of these aspects can make the site difficult to use. It can also take away the benefits of high-quality images by making them load slowly and inconsistently. Moreover, poor speed scores are also notoriously damaging. In fact, they can directly impact the likelihood of conversions: according to Portent, sites with load times of 1 second have 2.5x higher conversion rates than those with load times of 5 seconds. Thus, choosing a CMS that can eliminate those 4 extra seconds can have a huge effect on a company's bottom line.

Considering all of this, companies should strive to bring their speed and performance scores up to the same level as their other ones. While they could attempt to do so within the confines of a monolithic CMS, a simpler option is to switch to a headless

system as all of these monolithic options perform very poorly. Headless systems are not innately better suited for these metrics, but they equip users with more tools that can improve them. For example, implementing Jamstack architecture has been shown to decrease load times. Headless's decoupled front and backend can also help by isolating traffic on each side. As for images, companies can get the best of both worlds by keeping their high-resolution media but choosing a system that can automatically optimize them with an integrated tool. This provides the same quality of assets while also cutting down on load times.

Performance and speed are both significant priorities for leading eCommerce companies. Learn more about how UPC Business increased speed by 81% for over 2,000 pages with the help of Storyblok.

Decreased time to interactive from 30.6 seconds to 5.8 seconds	**500+ Pages in 4 Languages**	**Only 3 developers required**

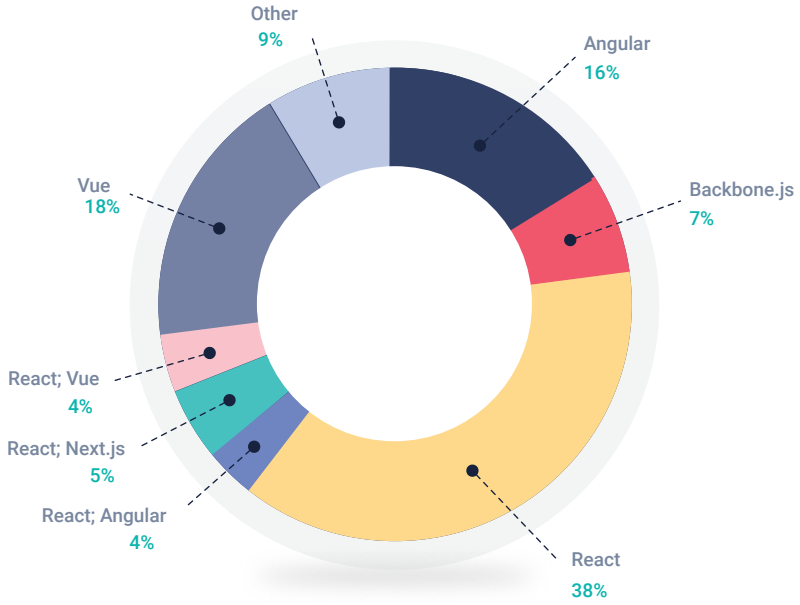
Frontend framework distribution

FRAMEWORK	USAGE
ANGULAR	195
BACKBONE.JS	82
REACT	461
REACT; ANGULAR	46
REACT; NEXT.JS	60
REACT; VUE	46
VUE	226
OTHER	106

Total usage of frontend framework

	1st	2nd	3rd
$10M-$50M	React	Vue	Angular
$50M-$100M	React	Vue	Angular
$100M-$250M	React	Vue	Angular
$250M-$500M	React	Vue	Angular
$500M-$1B	Vue; React	Backbone.js	React; Vue.js
$1B-$10B	React	WordPress	Vue
+10 BILLION	React	Angular	React; Next.js; Vue

Most common frontend frameworks per revenue bracket



Distribution of frontend frameworks for full sample

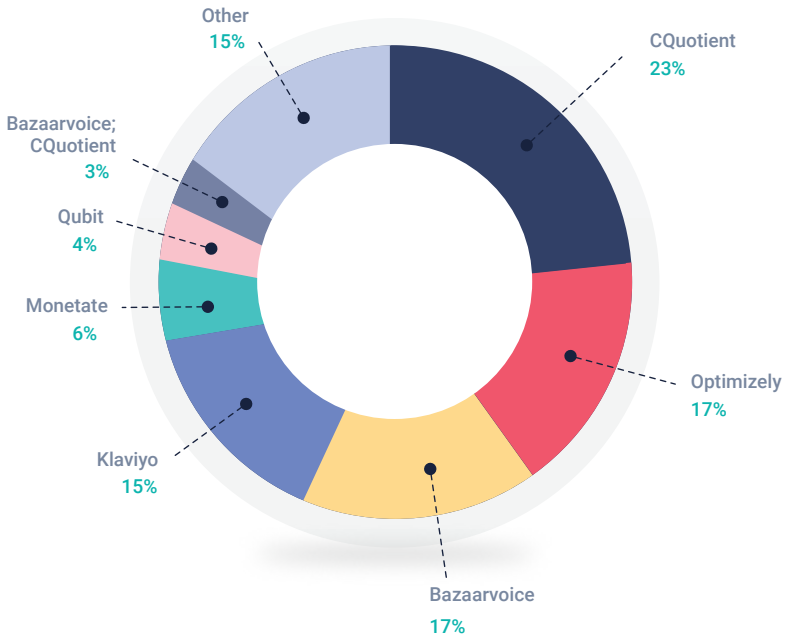
- **Observations :**
  - React is the most popular framework across all categories except for a tie with Vue in the $500M – $1B bracket
  - Second place goes to Vue followed by Angular. This is consistent across brackets as well, reflecting the far-reaching popularity of these three options

Personalization Tools

Personalization platform distribution

PLATFORM	NUMBER OF USERS IN THE SAMPLE
CQUOTIENT	110
OPTIMIZELY	82
BAZAARVOICE	80
KLAVIYO	74
MONETATE	27
QUBIT	19
BAZAARVOICE; CQUOTIENT	15
OTHER	72

Personalization platform distribution



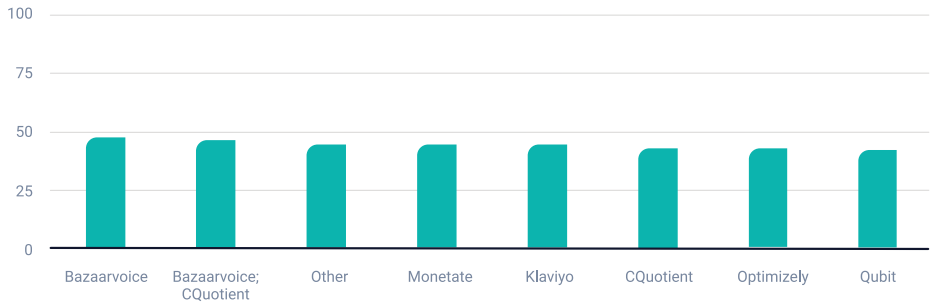
Observations :

- The top 3 personalization platforms are CQuotient, Optimizely, and Bazaarvoice
- Distribution among these and the fourth more common choice (Klaviyo) is fairly even

Bounce rates versus personalization platform choice

PLATFORM	AVERAGE BOUNCE RATE
BAZAARVOICE	46.5%
BAZAARVOICE; CQUOTIENT	46.1%
OTHER	45.3%
MONETATE	44.4%
KLAVIYO	44.0%
CQUOTIENT	43.3%
OPTIMIZELY	42.8%
QUBIT	42.1%

Personalization platform distribution versus bounce rate



This graph demonstrates that personalization platforms have fairly similar bounce rates across the board, with the biggest difference being between 42% and 47%. Additionally, the more popular platforms do not appear to have significantly lower bounce rates.

Regardless of which platform businesses choose, personalization is an essential strategy for every organization. Simply put, the market is saturated: with a projected market share of 7.4 trillion USD by 2025, standing out in this crowded field will only become more vital. Catering to such elements as a customer's location, previous purchases, and gender is crucial to capturing more conversions.

Keeping up with this strategy as an organization grows, however, can be tricky with a traditional system. Traditional systems are typically all-in-one packages, resulting in a tightly-knit tech stack that's highly resistant to change. Something like integrating new personalization tools or scaling up operations will necessitate adjustments to the total system or even resorting to an additional CMS. This requires considerable time, effort, and funding. Such a challenge means that organizations must either invest in this arduous undertaking or work with technology that is resistant to agile changes that could improve performance or scale up their capabilities.

Headless CMSs sidestep this problem by removing such constraints. The API-first nature of headless systems means that there's no one monolith that companies have to rely upon. Instead, they can simply use APIs to link any personalization tools they need into a centralized system. This is often called a best-of-breed approach as users are free to select individual tools that cater directly to their needs rather than relying on a predefined set. Moreover, since the API system can also integrate multiple channels, companies can use these tools to personalize customer experiences across every touchpoint from a single backend. The result is total freedom to scale and adjust their personalization strategy.

How Wüsthof launched a global site in 3 months

How Wüsthof launched a global direct-to-consumer site in 3 months

Wüsthof is a high-end knife-making company that's been family-owned for seven generations. While a traditional focus on craftsmanship has made them one of the world's leading manufacturers of these tools, the same can't be said about their traditional CMS. They were looking to create a digital ecosystem that could rise to the level of their products.

39.24% more website users

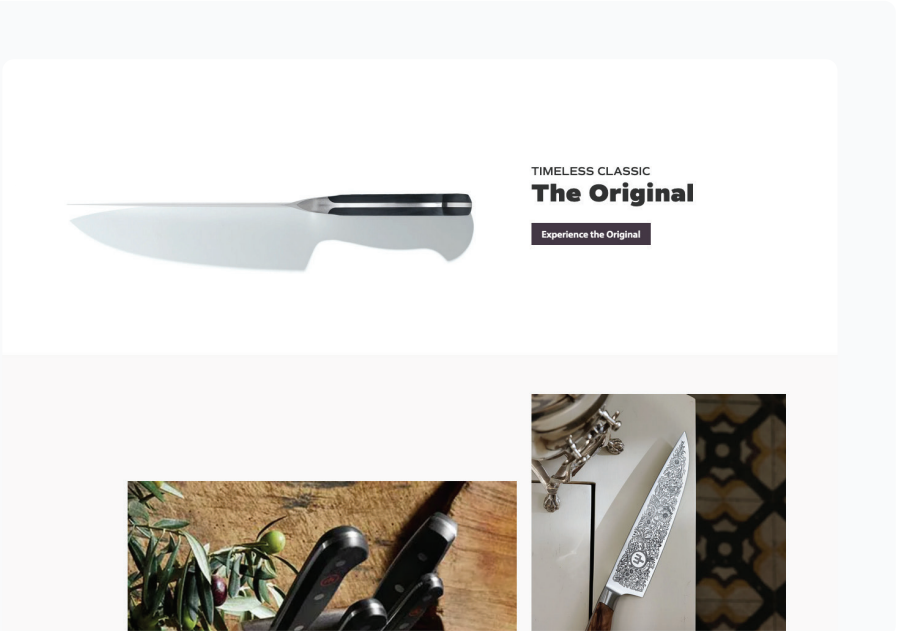
50% more organic traffic

50% increase in revenue

Website launched in **3 months**

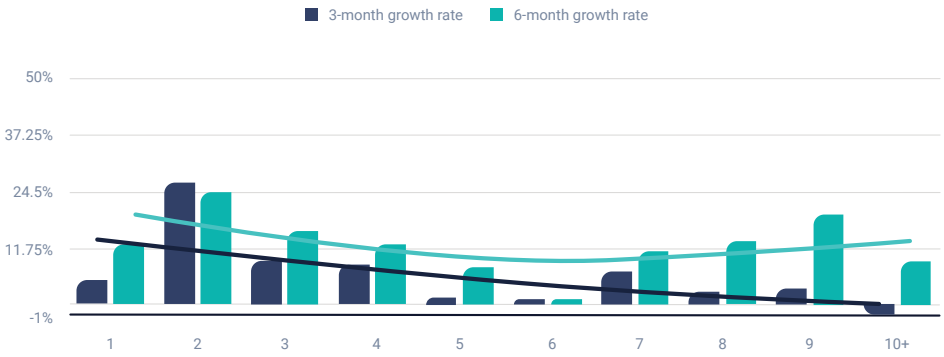
Storyblok soon emerged as their answer. Its total tech stack flexibility, powerful localization features, and user-friendly interface proved to be a success. Wüsthof was soon offering scalable, personalized content, including multiple product catalogs in different languages to serve over 80 countries.

For the full picture of how Storyblok helped Wüsthof quickly upgrade their digital presence, boost their visitors, and increase their revenue, check out the full case study.



Growth Rates

Number of supported languages versus 3-month and 6-month growth rate



Observations :

- While inconsistent, 3-month growth rates generally decrease as the number of available languages increase
- Adding languages can have a significant impact on growth rates: adding 1 to 3 extra languages can lead to up to a 26% growth rate in a 3-month period and a 24% growth rate in a 6-month period

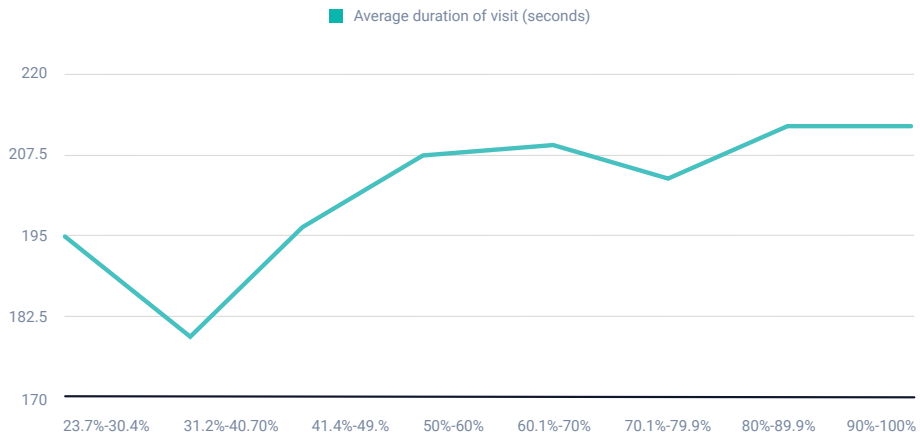
Adding more languages to a website usually suggests a growing audience across multiple markets. While one may expect this to result in steadily increasing growth rates, the truth is that it peaks at 2 languages and then decreases. 6-month growth rates are less predictable, with a dip at 6 languages that then returns to a general increase afterward.

The impressive growth when including 2 languages suggests that this is typically a time of great expansion for companies. This makes sense: these are likely organizations that are at the start of their business, and thus, have a lot of room for growth. Adding a second language thus increases their reach by a comparatively large amount, representing a 'boom' of sorts. **As such, having the potential to easily localize and provide content on many platforms at this point becomes crucial for capturing the maximum number of audience members.**

Similarly, this may be why there are lower 3-month growth rates for companies with more languages. The growth potential may have been exhausted, thus resulting in diminishing traffic returns. Nevertheless, this same sample demonstrates a growth in the 6-month timeframe. This may be due to the fact that while the initial implementation of new languages is not immediately impactful, it does succeed in eventually capturing a wider market, making it an important element for companies to consider throughout their entire lifecycle.

Traffic Changes

Time spent on sites based on the percentage of paid traffic



Observations :

- With a few irregularities, higher amounts of organic traffic generally correlate with more time spent during a site visit
- However, the differences between visit times generally plateau starting at the 50%-60% bracket

Organic traffic is an important part of any solid marketing strategy. This is supported by this study's results showing that sites with maximum organic traffic have users that spend the most time visiting their site on average. While this suggests that companies may want to prioritize top-of-funnel organic traffic, having 100% organic traffic is not necessarily realistic. Fortunately, a roughly even mix of paid and organic traffic results in nearly as much time spent on a site as the 80%-100% bracket. Thus, while more organic traffic should remain a priority, organizations may choose to sacrifice a bit of that performance in order to invest in other areas of the company.

Average traffic versus size of marketing team

- **Observations :**
  - Sites that handle more monthly traffic generally have larger marketing teams
  - However, this trend plummets with teams above 5,000
  - Additionally, sites with more marketers were also more likely to claim high traffic/poor performance as an issue

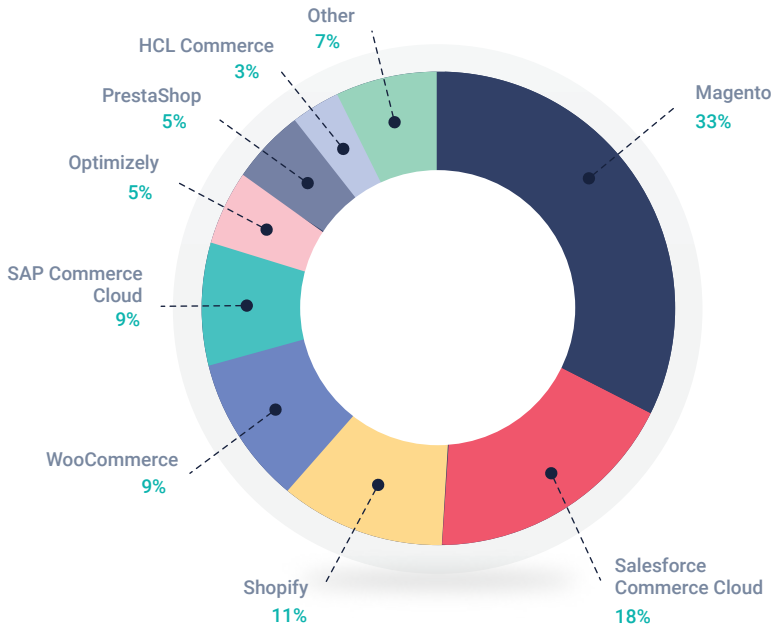
Bigger organizations with more traffic are more likely to need larger content teams, making the upward trend in this category unsurprising. Nevertheless, it peaks at the 1,001 – 5,000 team mark before spiking back down. Moreover, large teams of 5,001 – 10,000 are the most likely to cite high traffic but poor performance as a struggle This suggests that a larger marketing team does not lead directly to an increase in traffic, which in turn does not lead directly to better performance. As such, teams should focus on ways to capitalize on current visitors rather than concentrating solely on trying to attract more.

eCommerce Platforms

eCommerce platforms in use

PLATFORM	NUMBER OF USERS IN THE SAMPLE
MAGENTO	375
SALESFORCE COMMERCE CLOUD	207
SHOPIFY	124
WOOCOMMERCE	102
SAP COMMERCE CLOUD	98
OPTIMIZELY	58
PRESTASHOP	52
HCL COMMERCE	35
OTHER	85

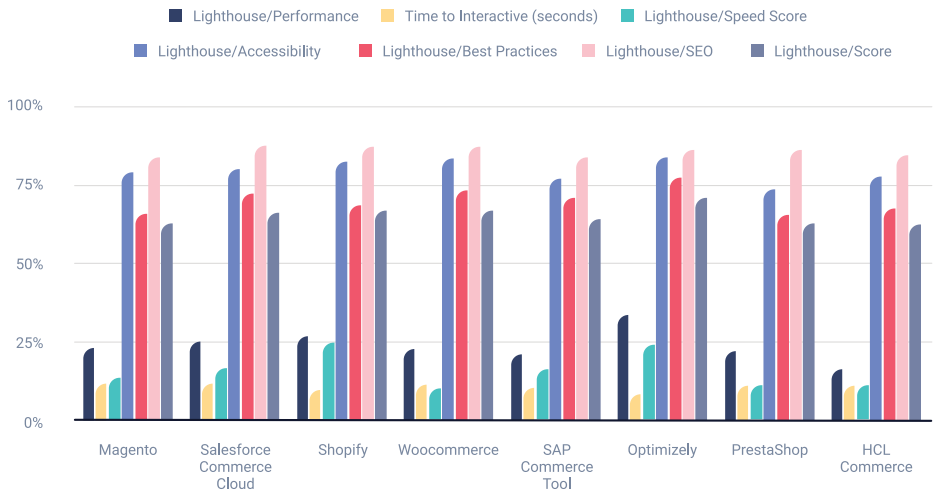
eCommerce platforms by number of users



Observations :

- Magento is the most common eCommerce platform by a fair margin (15%). Salesforce Commerce Cloud comes in second, followed by Shopify and then WooCommerce

Average Lighthouse scores per eCommerce platform



Observations :

- Optimizely excels, coming in first for 5 of the 7 categories
- Every eCommerce platform demonstrates shockingly low speed scores and performance scores

Despite the fact that Optimizely ranks first in every Lighthouse category, it is not the most popular platform – in fact, it only ranks as #6 out of 8. While Lighthouse scores are undeniably important, the lack of adoption given these metrics suggests that it is not a primary determining factor in platform choice.

However, it's important to note that even Optimizely fails to deliver adequate results when it comes to speed and performance scores, earning an average of 24.3 and 34.3 respectively. We saw a similar problem with monolithic CMSs as a whole. This suggests that such a setup inhernetly limits the success of any additional tools its users may choose to add on.

Conclusion

Key takeaways

- Monolithic CMSs are starting to apply serious restraints to companies. They force larger ones to opt for multiple content silos, which in turn makes it harder to achieve successful cross-functional collaboration. They also return poor Lighthouse speed and performance scores.

- As organizations expand, they'll see particularly valuable opportunities to maximize their work in the earlier stages such as when they add a second language. This makes preparing for said growth essential to fully capitalize on that success.

- Companies in the sample with the lowest and highest average revenue show different preferences in how they run their businesses. Understanding these choices, such as recognizing that WordPress is only popular among smaller organizations, can help you fully understand what technology will best support you as your business grows.

Try Storyblok today

As your organization grows, you'll be faced with a lot of potential in the early stages of your expansion. You don't just have to be ready to make the most of it – you also have to consider the future of your system and how it'll support your efforts going forward. If you're looking for a system that can meet your needs now while future-proofing your strategy, then Storyblok is for you.

Storyblok is a cutting-edge headless CMS. It frees you from the constraints of a monolithic system by decoupling your frontend and backend. The result is limitless expansion potential that will never lock you into a rigid structure. Your organization will always be changing – choose a system that will adapt to your strategy, not the other way around.

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Your Headless CMS

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