IDC MarketScape

IDC MarketScape: Worldwide AI-Enabled Headless Content Management Systems 2025 Vendor Assessment

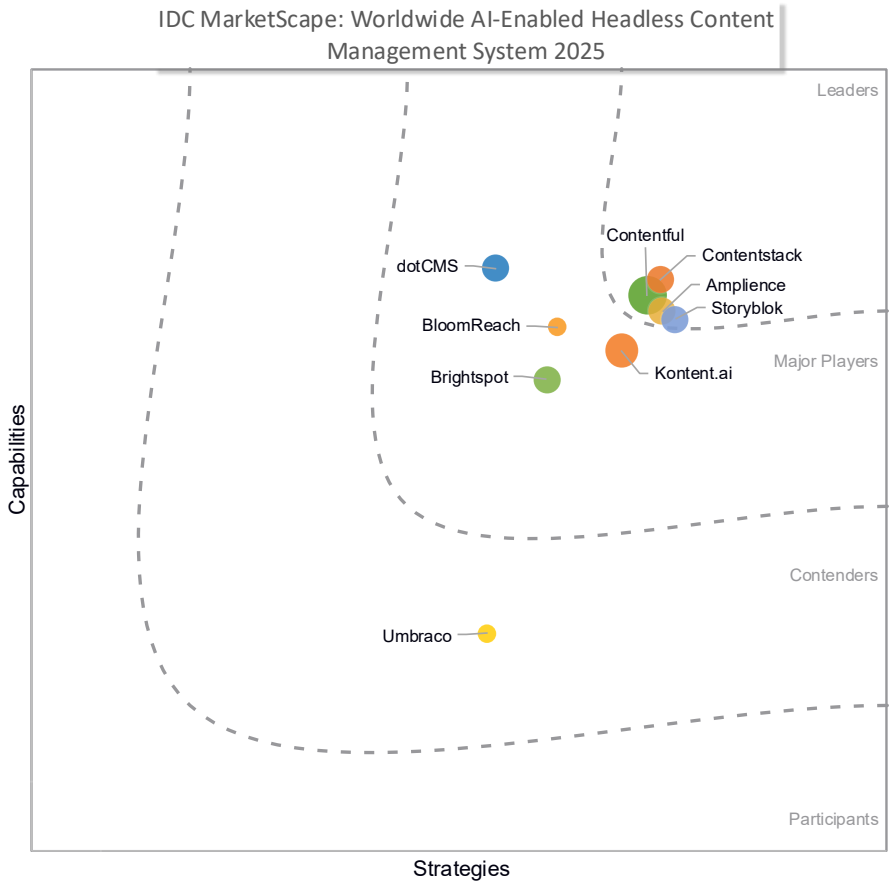
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THIS EXCERPT FEATURES CONTENTFUL AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide AI-Enabled Headless Content Management Systems Vendor Assessment



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See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide AI-Enabled Headless Content Management Systems 2025 Vendor Assessment (Doc # US52993725).

IDC OPINION

The shift toward composable digital experiences gave birth to the headless content management system (CMS) — an architecture built for developers seeking maximum flexibility and performance. Unlike systems that bundled content and presentation, headless platforms deliver structured content via APIs to any channel or device, enabling teams to design their own front-end experiences and accelerate innovation across ecosystems.

AI is redefining how these systems are built and used. GenAI enhances authoring and editorial efficiency by automating creation, translation, tagging, and optimization. Intelligent agents streamline developer workflows through automated API scaffolding, integration with front-end frameworks, and adaptive delivery optimization. Emerging agentic workflows take this further, orchestrating complex processes such as multi-format publishing, contextual preview, or SEO refinement with minimal human intervention.

An AI-enabled headless CMS manages content in an API-first repository, exposing all functionality through REST or GraphQL endpoints consumed by custom-built applications — whether websites, mobile apps, or emerging digital interfaces. This complete decoupling of content and presentation provides unmatched flexibility while allowing AI to automate tagging, schema generation, and integration across delivery channels.

AI also narrows the traditional gap between technical and creative users. Historically, authors in headless environments relied on developers for previews and visual context. Today, AI automatically generates preview environments, suggests layouts, and enriches content with SEO, accessibility, and personalization insights. Combined with WYSIWYG editors and third-party plug-ins, this allows content teams to work more independently while developers focus on performance and extensibility.

This convergence of developer freedom and AI-augmented authoring is driving rapid adoption of headless CMS. Organizations value the ability to compose omni-channel experiences from modular services and optimize operations through intelligent

automation — positioning headless CMS as the innovation layer of the modern, AI-driven content ecosystem.

AI-Enabled Headless CMS Anchors Composable Digital Experiences

Rising expectations and AI-accelerated workflows are pushing every organization — public and private — to modernize how they create, govern, and deliver content across web, apps, and emerging AI surfaces. Across headless deployments, buyers prioritize cloud velocity, interoperability, and measurable productivity while preserving governance, security, and regional compliance. As a result, CMS road maps concentrate on SaaS delivery, migration safety, and author-friendly tools that connect design systems to structured content and analytics.

- **Cloud-first operations:** SaaS becomes the default for elasticity, SLAs, and continuous delivery, while on-prem narrows to sovereign or highly customized estates. Vendors emphasize multi-region resilience, some hybrid options, and identical features across footprints.
- **Composable interoperability:** API-first platforms, SDKs, and curated marketplaces simplify integration with DAM, commerce, analytics, and identity. Buyers assemble modular stacks, mix public and private services, and negotiate portability to reduce lock-in.
- **AI and agentic workflows:** Generative and agentic capabilities move in-product to speed ideation, enrichment, localization, experimentation, and compliance. Guardrails, auditability, and outcome-level metrics (cycle time, reuse, test velocity) separate pilots from program value.
- **Programmatic migration:** Demand surges for dashboards, automation, and content sync that preserve URLs, SEO, and integrations. Vendors package blueprints and telemetry so replatforming becomes a staged, low-risk transformation rather than a one-off cutover.
- **Design systems and authoring ergonomics:** Visual assembly, live preview, and schema-aligned components let teams ship faster without breaking headless discipline. Alignment between structured content, design tokens, and analytics improves brand consistency and iteration speed.

Operational and Design Considerations for Headless CMS

Headless CMS have evolved from developer-centric publishing frameworks into AI-accelerated orchestration environments. Their API-first design and composable architecture remain foundational, but intelligence now permeates the entire development pipeline — automating schema design, code generation, testing, and

deployment. Agentic frameworks increasingly coordinate content workflows across channels, reducing friction between engineering and editorial teams.

The convergence of automation, governance, and scalability reinforces the defining strengths of headless architecture: agility, extensibility, and performance. For enterprises, AI-enabled headless CMS provide the most flexible path to innovation and omni-channel experience delivery without compromising architectural discipline or security.

Key architectural priorities for headless CMS buyers include:

- **Adopt AI-accelerated development workflows:** Select CMS that embed AI copilots to generate schemas, front-end components, and integration code — shortening development cycles and improving release velocity.
- **Implement agentic orchestration frameworks:** Require CMS to support autonomous agents that manage build, test, and deployment pipelines, enabling continuous optimization without manual intervention.
- **Mandate composable, API-first design:** Ensure all platform functions are available through REST or GraphQL APIs to maintain decoupling, interoperability, and consistent access across tools and services.
- **Enforce AI-aware governance and compliance:** Demand role-based controls, audit trails, and explainability features that monitor AI-driven actions and ensure alignment with corporate and regulatory policies.
- **Leverage extensible SDKs and developer tooling:** Favor platforms offering open SDKs, plug-ins, and CLI utilities that simplify integration with cloud, analytics, and AI service ecosystems.
- **Design for elastic scalability and edge performance:** Insist on architectures supporting global distribution, dynamic scaling, and low-latency API orchestration across regions.
- **Enable continuous learning and optimization:** Choose systems that collect telemetry to fine-tune API efficiency, content delivery speed, and personalization accuracy over time.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The vendor inclusion list for this document was designed to accurately depict the vendors that are most representative of any given AI-enabled headless CMS buyer's selection list. Vendors were then surveyed and further investigated to ensure their offerings qualified with both capabilities and strategies related to the AI-enabled headless CMS market.

Critical to this research was for the vendor to meet the inclusion criteria. Any vendor participating in this IDC MarketScape had to showcase that it met the following:

- Market presence and momentum, as based on discussions relating to the vendor during IDC interactions with the market during briefings, inquiries, and other meetings and engagements
- Generates revenue from a commercially supported business-packaged offering
- Deployment in the cloud as managed hosted private cloud and PaaS or SaaS in a public cloud
- Clients in cloud production for at least 12 months
- Targets and scales to meet the needs of midsize to large enterprise organizations
- 500+ employees, with approximately 50% of customers in this range
- Provides capabilities to create and manage websites or authenticated workspaces with support for the following capabilities:
  - Creation, curation, and management of content that can be assembled and approved for publishing web pages, mobile websites, and web apps
  - Content repository that provides library services to organize and maintain various content types and its metadata
  - Security, roles, and permissions management
  - Analytics and reporting at the infrastructure, content, and user experience layers
  - Interoperability with adjacent technologies via well-documented web services
  - Open APIs (either GraphQL or REST API), or SDKs

ADVICE FOR TECHNOLOGY BUYERS

Headless CMS remain the choice for developer-led organizations building composable digital experiences. AI now amplifies their advantages, automating schema creation, testing, and deployment while optimizing delivery performance. Buyers should focus on platforms that blend developer freedom with automation, governance, and scalability. IDC advises technology buyers to:

- **Select API-first, AI-accelerated platforms** that automate schema modeling, code generation, and workflow orchestration.
- **Assess developer tooling** — look for AI copilots, SDKs, and CLIs that speed build and deployment cycles.
- **Verify extensibility and interoperability** through well-documented REST/GraphQL APIs and prebuilt integrations.

- **Evaluate AI-driven governance** ensuring transparency, permission control, and auditability for automated actions.
- **Prioritize elasticity and performance** via multi-region delivery, edge rendering, and continuous optimization telemetry.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Contentful

After a thorough evaluation of Contentful's strategy and capabilities, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for AI-enabled worldwide headless content management systems vendor assessment.

Contentful was established in 2013 and is headquartered in Berlin, Germany. The Contentful Platform provides the vendor's headless CMS capabilities within a composable digital experience platform offering.

Quick facts about Contentful:

- **Employees**: 750 +
- **Global Sales Support**
  - **Direct sales**: Australia/New Zealand, APAC (excluding China, Japan, Australia, New Zealand), Europe, Middle East/Africa (MEA)
- **Cloud Hosting Presence and Type**
  - Both public cloud and regional datacenter: Europe, North America
  - **Not available**: Middle East/Africa (MEA), South America, rest of world
- **Approaches and support for web technologies and frameworks**: Built with modern decoupled frameworks (e.g., React, Vue, Angular, Node.js), modular system with loosely coupled services using different technology stacks, fully composable cloud-native architecture with containerized services and API-first design
- **Open source code base**: 75-99%; open source core, with some proprietary wrappers or extensions

Strengths

- **Developer-Centric Platform**: The platform provides deep API coverage, GraphQL and CLI support, and strong extensibility, giving developers significant control over composable architectures.
- **Partner Ecosystem Scale**: Contentful maintains one of the largest partner networks in the headless category, with agencies, integrators, and certified partners supporting global deployments.
- **Enterprise-Grade Compliance**: The platform offers strong cloud-native security, compliance certifications, and identity integrations to assure regulated industries.

Challenges

- **Limited Native Analytics**: Contentful provides few native reporting, testing, or optimization capabilities, requiring external analytics platforms.
- **Uncertain AI Positioning**: Contentful's road map for AI and agentic capabilities is less aggressive, which may disappoint some buyers prioritizing automation.
- **Geographic Reach**: Contentful's global presence, while improving, remains less extensive in certain regions.

Consider Contentful When

Consider Contentful when your enterprise requires an innovative composable content platform with global adoption, broad partner support, and deep developer extensibility. Contentful is better suited for organizations standardizing on an API-first architecture, integrating best-of-breed services, and scaling content operations across multiple brands and regions.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts examine how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in 3–5 years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next 3–5 years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

For this IDC MarketScape, vendor size was determined by IDC's 2024 Software Tracker and validated by vendors on their revenue in the market. For details regarding the vendors and size of the market, see *Worldwide Web Content Management Software Market Shares, 2024: From Suites to Stacks — Composability Challenges Market Share* (IDC #US53742225, August 2025) and *Worldwide Persuasive Content Management Applications Market Shares, 2024: Leaders Win with Content and AI to Solve the Biggest Employee and Customer Experience Challenges* (IDC #US52096825, August 2025).

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgments about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Content management systems (CMS) are foundational to delivering persuasive digital content and experiences — the ability to create, manage, and orchestrate messages that inform, engage, and convert audiences across every digital touch point. As part of IDC's Persuasive Content and Experience Strategies initiative, CMS represent the core technology layer enabling organizations to curate, publish, and optimize editorial, image, rich media, and product content across omni-channel environments, including websites, mobile apps, social networks, digital signs, IoT devices, and conversational interfaces. These systems unify content, design, and data to power connected, data-driven experiences at enterprise scale. IDC categorizes CMS architectures as follows:

- **Application programming interface (API) frameworks:** APIs connect back-end content repositories with front-end presentation layers and external services.

Modern CMS use RESTful, GraphQL, and event-based APIs to enable composable architectures, support data exchange, and integrate with adjacent systems such as analytics, commerce, and personalization engines.

- **Front-end presentation layer:** The front end defines how content is displayed to the end user, using standard web technologies — HTML for structure, CSS for design, and JavaScript for interactivity. Developers increasingly use single-page (SPA) and progressive web app (PWA) frameworks to deliver responsive, app-like experiences powered by CMS APIs.
- **Full-stack CMS:** Full-stack platforms integrate both content management and presentation within a unified environment. Built on service-oriented or modular architectures, they use internal APIs to connect functional and presentation layers. Modern versions selectively expose APIs to external systems for extensibility while preserving the benefits of centralized authoring, workflow, and governance.
- **Headless CMS:** Headless systems separate content creation from presentation. They manage structured, design-agnostic content in API-accessible repositories, allowing developers to build custom front ends that consume data via REST or GraphQL interfaces. All presentation-dependent functionality must be accessible externally, ensuring full decoupling between front-end and back-end logic.
- **Hybrid-headless CMS:** Hybrid systems blend managed presentation control with headless flexibility. They share a single content model across both modes, enabling organizations to manage content once and publish anywhere through visual authoring interfaces or API-based delivery.
- **Monolithic CMS:** Earlier-generation systems provide all functionality within a single, tightly coupled code base where the presentation, logic, and storage layers are interdependent. While convenient, these architectures lack modularity and cannot support true composability.

AI-Enabled CMS Architectures

AI now operates as a defining layer across all CMS types. AI-enabled CMS embed generative, predictive, and agentic capabilities throughout the content life cycle — from creation and enrichment to orchestration, delivery, and optimization. In detail:

- **GenAI** accelerates authoring, translation, tagging, and layout design.
- **Predictive AI** analyzes behavioral and contextual data to drive personalization, content recommendations, and performance optimization.
- **Agentic workflows** automate orchestration tasks such as testing, deployment, and governance, coordinating actions across multiple services through autonomous agents.

Modern CMS expose these AI capabilities through APIs or model integration layers, enabling organizations to combine vendor-provided intelligence with external AI services while maintaining transparency, explainability, and governance controls.

Deployment and Cloud Configurations

CMS solutions can be deployed on premises or across multiple cloud environments. IDC defines its cloud taxonomy as follows:

- **Software as a service (SaaS)**: Multi-tenant, vendor-managed services where unrelated customers share a common application and infrastructure environment.
- **Platform as a service (PaaS)**: Cloud-ready environments owned or managed by the customer or partner, supporting elastic scaling, self-service, and API-based extensibility.
- **Single-tenant deployments**: Dedicated environments, public or private, in which each software instance serves one customer over an extended period.
- **Public cloud services**: Shared infrastructures designed for multi-enterprise use (e.g., AWS, Azure, GCP).
- **Private cloud services**: Dedicated or partner-managed clouds offering controlled access, data residency, and compliance alignment for a single enterprise.

Modern CMS increasingly combine cloud-native deployment, composable design, and embedded AI to deliver governed, adaptive, and continuously optimizing persuasive digital experiences.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide AI-Enabled Full-Stack Content Management Systems 2025 Vendor Assessment* (IDC #US52993625, October 2025)
- *IDC MarketScape: Worldwide AI-Enabled Hybrid Headless Content Management Systems 2025 Vendor Assessment* (IDC #US52993825, October 2025)
- *Worldwide Web Content Management Software Market Shares, 2024* (IDC #US53742225, September 2025)
- *Worldwide Web Content Management Software Forecast, 2025–2029* (IDC #US53742325, September 2025)
- *Worldwide Web Content Management Software Forecast, 2025–2029* (IDC #US53742325, August 2025)

- *IDC ProductScape: Worldwide Content Management Systems, 2025 — Technology Supplier Solution Functionality* (IDC #US53168725, February 2025)
- *IDC's Web Content Management System Survey, 2024* (IDC #US52561224, September 2024)

Synopsis

This IDC study provides an assessment of the AI-enabled headless content management systems powering AI-enabled, API-first digital experiences and presents the critical criteria for organizations evaluating headless CMS solutions. The analysis considers both quantitative and qualitative dimensions of vendor success, including developer productivity, composable scalability, and automation across authoring, orchestration, and delivery workflows. The IDC MarketScape methodology evaluates how effectively vendors combine open, extensible architectures with intelligent automation to support omni-channel content operations.

This report identifies the technologies and strategies expected to shape the next generation of the headless CMS market, including AI-accelerated development environments, multi-agent orchestration, schema intelligence, and continuous optimization capabilities that improve speed, performance, and personalization.

"Headless CMS have entered an AI-accelerated era. Developers now expect intelligent copilots, agentic automation, and composable frameworks that turn complexity into velocity — allowing organizations to deliver and optimize experiences at scale with unprecedented agility." — James McCormick, senior research director, IDC Digital Experience Strategies

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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