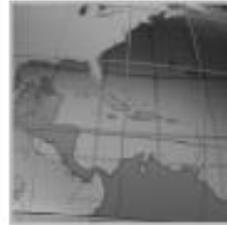# Analysis

Production Printing & Media

Digital Publication Platform Market Overview

Service Area

Digital Marketing & Media Trends

Comments or Questions?

InfoTrends
A Questex Company

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Executive Summary

Digital publishing has long been established in the graphic arts industry, traditionally being used by service providers as a way to convert PDFs meant for printed media into a digital format that can be accesses via mobile or web. For many, this is still the impression they get from the phrase "digital publishing." With the recent proliferation of content marketing and increasing need to fulfill content delivery on mobile devices, however, digital publishing has now become an important component of the digital tool box for marketers. Digital publishing technology today is also a far cry from an optimized PDF file; instead, digital publishing vendors offer solutions that allow for interactivity, reader tracking, native mobile app development, and much more. With digital publishing technology beginning to grow outside of graphic arts, more vendors have entered the space—which can lead to confusion for the purchaser of the software on what a modern digital publishing solution should look like. InfoTrends believes that digital publishing software must meet the following requirements:

- **Rich media publishing capabilities:** Solutions must be able to allow users to publish and preview rich media, such as video, for digital publication output.

- **Analytic and data reporting:** Solutions must be able to track and provide data analytics and reporting for reader tracking, advertisements, and publication information.

- **Publication management:** Solutions must allow for users to take control of their workflows by being able to manage publication folios, push out content for publication, or store media for previous and future publications.

- **Content Distribution:** Solutions need to allow end users to publish to mobile app stores, such as Google Play or Apple; internal portals; or market places. Furthermore, content should be able to be published in file formats that are in accordance to industry standards, such as PDF or epub.

These requirements are currently being filled by some of the major influencers within this software segment such as Adobe, Mag+, and Quark. Furthermore unlike other software markets where smaller company sizes may be underserved, the digital publishing vendor landscape is filled with solutions for all organizational company size classes. It is this large variety that competition is high for these solutions and driven by consumer behavior and how they interact with digitally published content. In an effort to better understand the capabilities of vendors across the digital publishing software landscape, InfoTrends has developed this analysis piece highlighted who we believe to be the top vendors in this market.

Key Findings

- InfoTrends' research shows that over 90% of enterprises are moving towards electronic documentation. What this means is that now publications such as annual reports, brochures, and other corporate documentation are moving away from print business to digital.

  o These factors, combined with the need for better content marketing, are driving digital publishing software investment.

- The digital publishing platform landscape is made up of approximately 60 to 80 main companies, but is dominated by a few vendors who can be considered influencers within the space. Nevertheless, only about six truly dominate the space, with Adobe's DPS being the largest in this market.

- InfoTrends estimates that the digital publishing platform market will grow by a 25% CAGR over the next five years.

Recommendations for End Users

- End users are encouraged to evaluate digital publishing solutions by how they fit their organizational needs. Some solutions will be aimed at the enterprise market, as those that provide more features may be too robust for smaller companies or individual users.

- End users must have a discussion with their vendor on how the digital publishing solution integrates into existing content marketing software or other marketing technology being used to ensure that analytics gained from the solution are actionable.

Recommendations for Vendors

- For many end users, proving return on investment (ROI) of digital publishing solutions is a big concern. Vendors must make sure that they develop strategies to help customers overcome ROI concerns and make sure to engage early on in the sales process or strategy.

- Vendors need to understand the other solutions that end users are implementing for content marketing efforts and ensure that their software has application protocol interfaces (APIs)/flexibility that allow for integration into other systems.
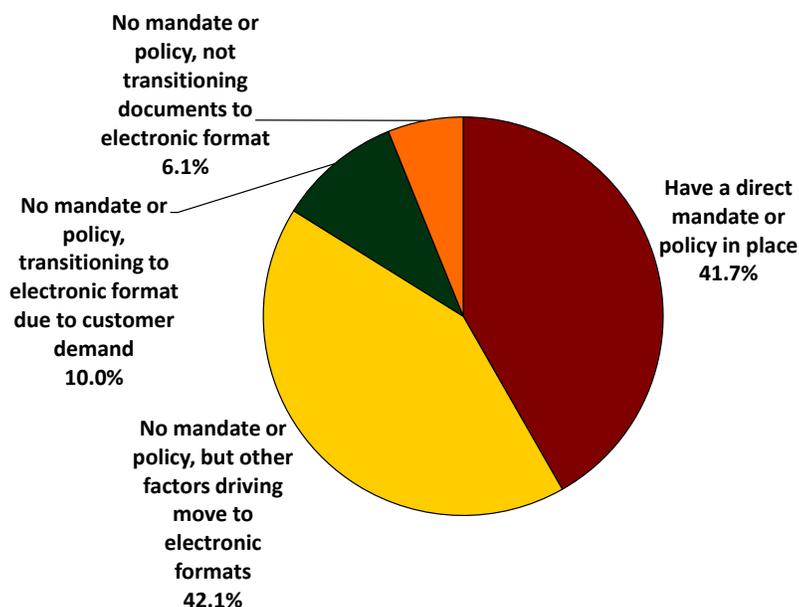
Introduction

Content marketing is helping to drive the way marketers are reaching out to customers and prospects. Many companies across all size classes are beginning to develop more digital content to help drive customer loyalty, engagement, and sales. One way in which companies are doing this is through offering content marketing pieces through digital publications on mobile and tablet devices. Digital publishing allows marketers to produce rich content in a style that is familiar and interactive for the end user. Digital publications have even begun to move away from the marketing department and are now being used as a means of sales enablement, training, and informational publishing for organizations. While the market of digital publishing software solutions is heavily populated, there are a few vendors that stand out as market leaders.

Trends in Integrated Digital Publication Platforms

One of the first trends in digital publishing platforms is happening in the enterprise markets. InfoTrends' research shows that over 90% of enterprises are moving towards electronic documentation. What this means is that now publications, such as annual reports, brochures, and other corporate documentation, are moving away from print to digital. The drivers are trifold—policies that are handed down are pushing for cost savings, going "green," or faster turnaround time. The need for more personalized communications across the enterprise is also driving conversion; as a result, mandates for digital publications are accelerating this transition.

Figure 1: Rate of Adoption of Digital Publications in Enterprise

Q: Does your company mandate or have policies in place to transition documents to electronic format?
.

No mandate or policy, not transitioning documents to electronic format 6.1%

No mandate or policy, transitioning to electronic format due to customer demand 10.0%

No mandate or policy, but other factors driving move to electronic formats 42.1%

Have a direct mandate or policy in place 41.7%

N= 1026
Source: *Understanding Vertical Markets: Enterprise Communication Requirements*; InfoTrends 2012

As a result of these policies driving change internally within companies, InfoTrends has seen a shift in the types of documents that are being produced via digital publications. Companies are looking to provide not only marketing tools, but sales enablement, training, and other common documentation to staff in a digital publication format. This shift is also being seen among publishers of traditional books and magazines, which shows (for the first time ever documented by InfoTrends' study Emerging Trends in Publishing) that approximately 22% of publishers are producing digital publications for non-book or magazine purposes.

The result of marketers and other business units employing more digital publications means that software vendors of digital publishing platforms now have a different set of functionalities that they must add to their solutions. Some of the changes that vendors have included are as follows:

- **Increased analytics and tracking of readers**: Digital publishing platform vendors are now finding their products are out of the hands of publishers and in those of marketers. Therefore, as a result, the ability to provide tracking and analytics of content is critical for successful deployment of the solution.

- **e-Commerce capabilities:** As more e-commerce is enabled via mobile devices, digital publications must also have this capability. Software vendors have begun to incorporate the ability to have landing pages for e-commerce and in-app purchasing capabilities in their solutions to allow businesses to have the ability for e-commerce.

- **Expanding beyond just in software publication:** Digital publications are just another mode of content marketing; however, it is another channel that can run the risk of becoming disconnected from other content. Some vendors of digital publishing solutions offer the ability to publish from other content channels, such as web content management (WCM), to enable users to unify their content marketing experience and bring information all together.

- **Multi-device previews:** Finished digital publications can end up in a multitude of places, such as on mobile devices, tablets, and on the web. Each of these outputs could be a different operating system or resolution size, which is why testing is necessary for all digital publications.

Defining the Market

The digital publication platform market is one that is composed of several large players and a mix of smaller more mid-sized companies. While the mix in company size and reach varies, many vendors are still able to serve those in the small to medium-sized business (SMB) and enterprise company class sizes. Nevertheless, the there are some major requirements that a vendor must have to be considered a digital publishing platform. InfoTrends has divided the requirements of functionality into the following segments:

- **Rich media publishing capabilities:** Solutions must be able to allow users to publish and preview rich media, such as video, for digital publication output.

- **Analytic and data reporting:** Solutions must be able to track and provide data analytics and reporting for reader tracking, advertisements, and publication information.

- **Publication management:** Solutions must allow for users to take control of their workflows by being able to manage publication folios, push out content for publication, or store media for previous and future publications.

- **Content Distribution:** Solutions need to allow end users to publish to mobile app stores, such as Google Play or Apple; internal portals; or market places. Furthermore, content should be able to be published in file formats that are in accordance to industry standards, such as PDF or epub.

One of the main requirements of digital publication software is its ability to produce different varieties of output. Depending upon the output file type, the range of interactivity of the final product is determined as well as the type of channel the content can be deployed to and the robustness of the solution itself.

**Figure 2: Digital Publishing Interactivity Landscape**
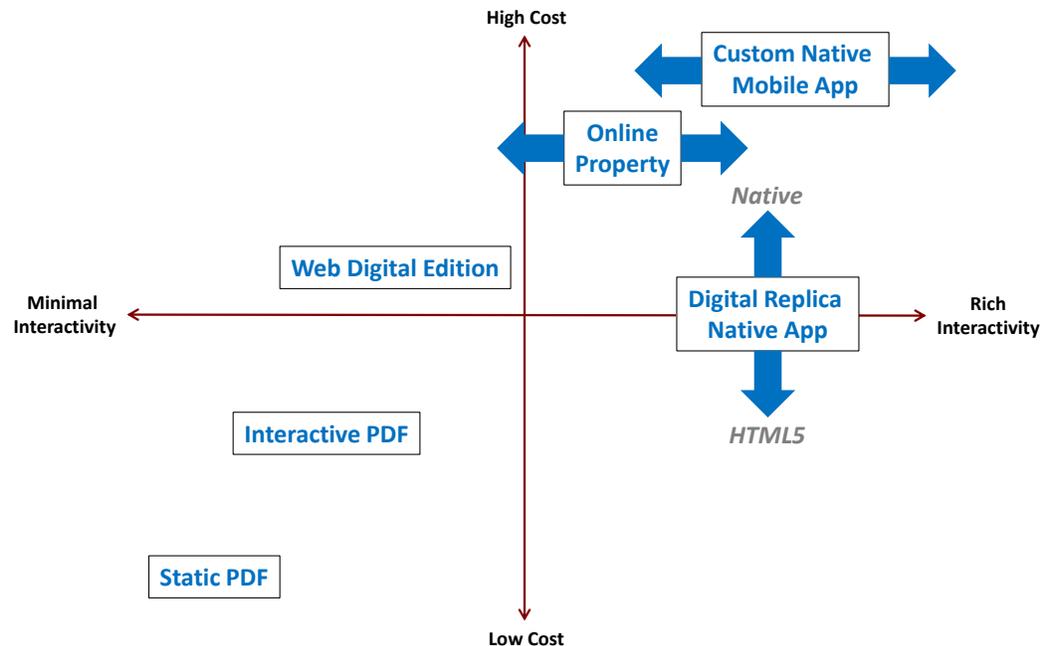
The amount of interactivity a digital publishing solution can provide also determines the cost of production of an application; the more elements that are added, the more complex the finished product can become. For service providers or marketers, looking at the technology landscape from the perspective of interactivity can help determine which methods work best for the type of end user experience they want to provide.

Overview of Key Players

The digital publishing platform landscape is made up of approximately 60 to 80 main companies, but is dominated by a few vendors who can be considered influencers within the space. All of these vendors have offerings that fall within the requirements of digital publication platforms. As a few companies dominate the space of digital publishing platforms, there are also smaller players consider whose main focus is around the mid-level enterprise and SMB company class sizes.

Figure 3: Digital Publishing Vendor Landscape
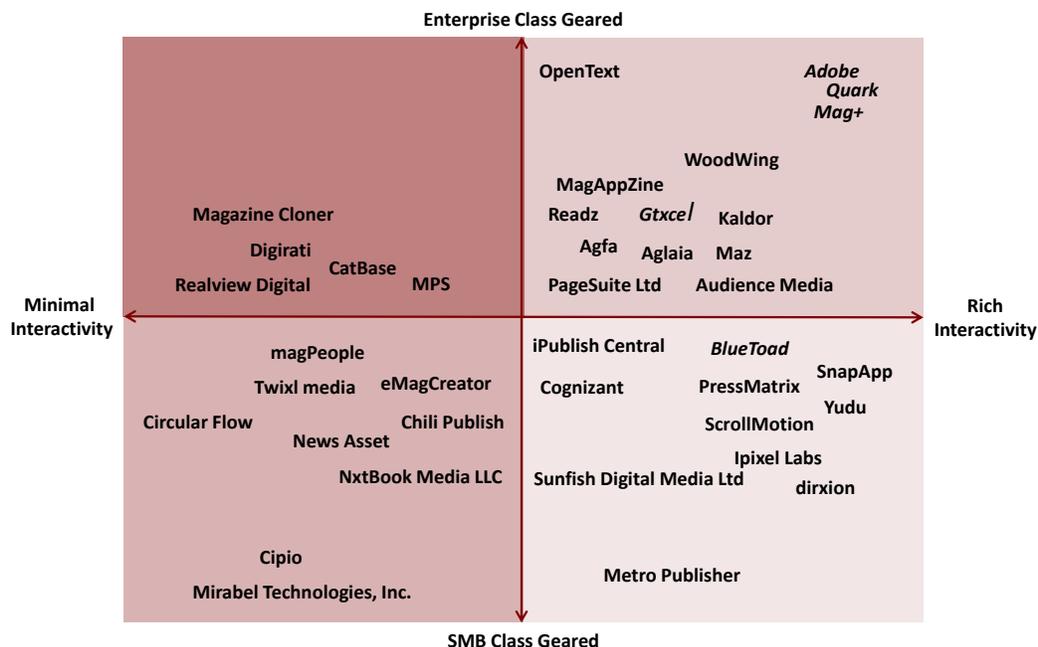
Note: For more detailed feature function of the highlighted vendors, please see the Appendix in the back of this report.

Adobe

Adobe's Digital Publishing Suite (DPS) is one of the most well-known of the digital publication platforms. Adobe DPS finds its strength in being able to integrate into Adobe's other products, such as the Creative Cloud and Marketing Cloud. As a result, Adobe DPS has some features that other publishing platforms have yet to incorporate into their capabilities. One such capability is the ability to publish content from web content management solutions, such as Adobe Experience Manager and Drupal.

In addition Adobe DPS takes advantage of Adobe's analytics and marketing automation capabilities from the Marketing Cloud. The solution currently supports over 2,000 publications on the market, with many of the major publishers using Adobe DPS. The solution is available in three levels: Single Edition, Professional Editions, and Enterprise Editions; the higher the level of subscription, the greater the capabilities.

While Adobe dominates the market, it is geared towards mid-size and full enterprise customer. Therefore, SMB companies may find the solution too robust for their needs.

BlueToad

A mid-size player within the market is **BlueToad**, whose main offering centers on the ability to convert PDFs to digital editions. BlueToad also allows for creative native mobile apps to be sold in commercial mobile app stores and internal portals. The base of BlueToad's solution relies heavily on HTML5 allowing for mobile optimized content. BlueToad allows their digital publications to be delivered via e-mail, through company websites, and by mobile apps.

One aspect BlueToad is known for is the ability to offer preferred management for subscriptions, so a publisher can have readers select when they would prefer to have a digital publication or printed publication delivered to them. BlueToad also has their own analytics platform called Thermostats, which monitors basic readership data.

Censhare

Censhare is a German-based company that has a digital publishing platform underneath their Enterprise Content Management System (ECMS). Since the Censhare publisher sits within the ECMS, much like Adobe's DPS, the end user can take more of a marketer's approach to digital publications as a part of a larger suite of products.

Publications issued via Censhare have the ability to be delivered as a digital publication, native, or web mobile app. Censhare also has the ability automate tasks by plugging into Adobe InDesign's server, allowing for file conversion as well as the importing/exporting of content for publication. The strength of Censhare's digital publishing platform lies in its ability to fall within a larger suit of ECMS products, as well as providing localization that helps to allow end users to issue content with variants, perform translation management, and collect more detailed end user analytics.

GTxcel

Another digital publishing platform that is well established in the space is **GTxcel**. GTxcel products are geared towards production print service providers and high volume publishers, but smaller businesses can also use the software.

Earlier this year, GTxcel announced that it would be the solution that powers Xerox's FreeFlow Digital Publisher product, which allows for PDFs geared for production print to be converted/optimized into digital publications. Output capabilities for the platform are digital editions, mobile apps, document management, and micro-websites. The advantage of GTxcel is that is can easily fit within workflow products that publishers and marketers may already use for printed materials. Nevertheless, since the same PDF is being optimized for print and digital, there could be bottlenecks when rich media is incorporated into the digital product.

Mag+

Mag+ is considered a direct competitor to Adobe DPS, as it is one of the few products that does not optimize PDF files for digital editions but rather uses the solution to create specialized files for digital editions or mobile apps. In addition, the entirety of the Mag+ platform is 100% in the cloud, using a SaaS based business model.

Mag+'s customer base is in enterprises that are using the solution to publish non-consumer based mobile apps that are available in Google or Apple app stores, or via internal company portals. Mag+ also allows has robust analytics capabilities, e-commerce capabilities, and support rich media. One challenge to Mag+'s growth is its geographic reach; the solution is mostly known in North America and lacks the channels in other countries that would allow for increased expansion and user awareness.

Quark

Quark's Publishing Platform is one of the original digital publishing platforms that came on the market during the rise in digital edition and mobile app publications. While many vendors still focus on catering towards publishers and beginning to adapt to enterprise, Quark has been well established in the enterprise documentation and digital publication market.

The Publishing Platform allows for the automation of publications using layout and authoring tools; analytics; and can publish in multiple digital publications, including mobile, HTML5, and XML. The Publishing Platform is also integrated with vendors that offer content management solutions for the enterprise such as IBM, EMC, and Microsoft.

Van Gennep

Van Gennep has been on the publishing systems space since 1988. Based in the Netherlands, the company is known for its current solution PublishingNow, a platform that uses digital asset management software (DAM) vendor Adam Software as the backbone of its technology. Like other digital publishing solutions, PublishingNow has the ability to publish to multiple channels and allows for rich media. The strength of the solution relies on its DAM-based backbone, which allows end users to better control their file structure and reuse content for print and digital channels.

Like many digital publishing platforms, PublishingNow also has template available for different output channels, allowing for content previews and planning tools. While PublishingNow is more well-known within the European markets, it has the ability to expand into other geographies as Adam Software extends their reach. Due to the strong DAM capabilities of the solution, it could also see higher demand in the enterprise market where there is currently a high degree of interest in digital publication as it relates to content management.

Digital Publication Market Sizing

InfoTrends estimates that the digital publishing platform market will grow by a 25% compound annual growth rate (CAGR) over the next five years. While the technology of digital publishing has been in existence for some time, the rate of adoption of solutions is now picking up outside the traditional market of print service providers and publishers. Since the market is one that is not fully developed, there is the opportunity for larger vendors established in enterprise software and print production workflow to come in and acquire smaller players in the market—or disrupt the market by offering their own solution. Vendors also have the opportunity to serve as an educational resource to enterprises, and other new users looking to invest and use the technology.

Figure 4: Worldwide Digital Publishing Revenue
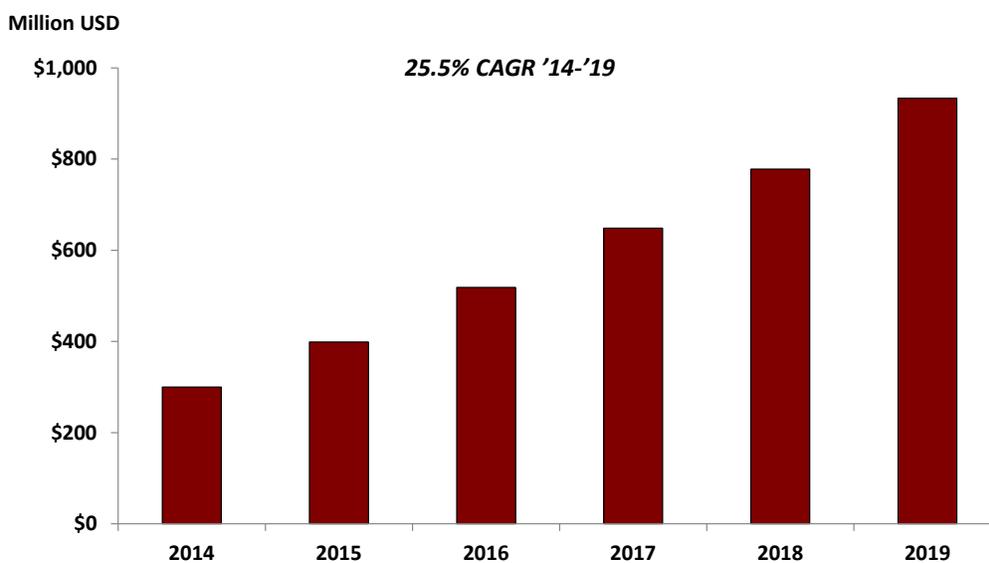
InfoTrends' Opinion

As companies continue to rely on offering content marketing pieces through digital publications on mobile and tablet devices, vendors must be able to supply the technology to enable these efforts. As enterprises continue to become more digital document-centric, digital publications are now being used as a means of sales enablement, training, and informational publishing for organizations. InfoTrends believes that digital publishing will become of greater importance to marketers within the next five years, and will be an integral part of the content marketing workflow. As this importance grows, vendors need to be able to offer the functionality to allow marketers to expand their efforts for the latest consumer technology.

Appendix: Digital Publication Platform Features

	Adobe Digital Publishing Suite (DPS)	BlueToad	Censhare	GTxcel	Mag+	Quark	Van Gennep
Pre-media							
Content Design/Editing	X	X			X	X	
Translation Optimization			X				X
Content Management	X		X	X		X	X
Testing							
Publication Preview	X	X	X	X	X	X	X
Publication Testing	X	X	X	X	X	X	X
Live Publication Testing Mobile/Tablet Devices	X		X		X	X	
Rich Media Publication Preview	X		X		X	x	X
Readership Data							
Geolocation Information	X		X	X	X	X	
Time Spent with Content	X	X	X	X	X	X	
Download Stats	X	X	X	X	X	X	
Readership Rates	X	X	X	X	X	X	
Media Enablement							
Custom API or SDK	X	X			X	X	
Rich Media Enablement	X	X	X	X	X	X	X
Social Media Sharing	X	X	X	X	X	X	X
e-Mail Sharing		X	X		X	X	X
Targeted Messaging	X		X	X	X	X	
Commerce							
In-app purchasing					X	X	
App Store/Newsstand Payment System	X	X	X	X	X	X	
Single Issue Purchase Capability	X	X	X	X	X	X	
Subscription Purchase Capability	X	X	X	X	X	X	

	Adobe Digital Publishing Suite (DPS)	BlueToad	Censhare	GTxcel	Mag+	Quark	Van Gennep
Distribution							
App Stores	X	X	x	X	X	X	
Internal Portals	X	X	X	X	X	X	X
Web Marketplaces (e.g., Amazon.com)	X		X			X	X
File Format Delivery							
Native Mobile App	X	X	X	X	X	X	X
Web Mobile App	X	X	X	X	X	X	X
Digital Edition	X	X	X	X	X	X	X
e-Book	X		X	X		X	X

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Comments or Questions?