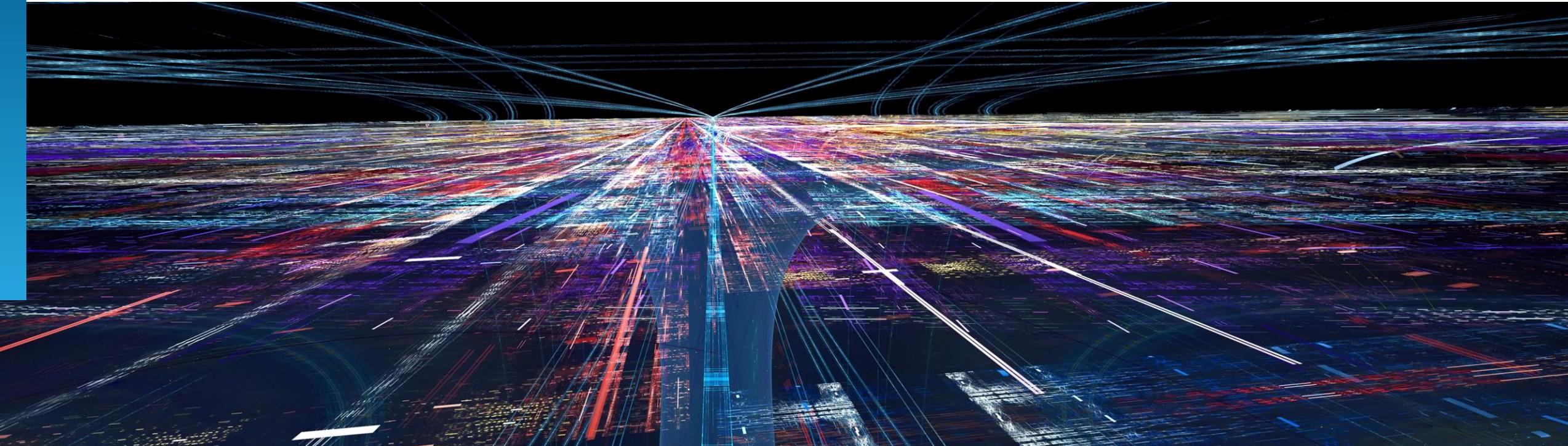


Digital Interactive Experience (IX) Services PEAK Matrix[®] Assessment 2020

September 2020: Complimentary Abstract / Table of Contents



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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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For more information on this and other research published by Everest Group, please contact us:

Nitish Mittal, Vice President

Nisha Krishan, Senior Analyst

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Background of the research

- Enterprises are increasingly focusing on experience as the key to building a sustainable growth strategy. While earlier, the narrative around delivering great experiences was primarily viewed from the lens of customer experience, the recent pandemic has put a spotlight on employee experience
- Moreover, the lines between digital and physical have blurred, leading to the emergence of “phygital” experiences aided by advances in technologies such as computer vision, edge computing, and touchless payments. This is also leading to the rise of “invisible experiences”
- COVID-19 has resulted in emergence of new use cases to enhance “at home experiences.” It has also led to a sudden acceleration of digital transformation, pushing companies to embark on their digital journeys by jumping on the bandwagon of mobile e-commerce
- Given the role that experience plays in evolving a differentiated value proposition for enterprises, service providers have made significant investments to help companies deliver on their experience mandate
- In this research, we present an assessment of 18 service providers featured on the IX services PEAK Matrix®, a comprehensive matrix that evaluates and categorizes service providers in terms of their capabilities

The assessment is based on Everest Group’s annual Request for Information (RFI) process for calendar year 2020, interactions with leading IX service providers, client reference checks, and an ongoing analysis of the IX services market.

This report includes the profiles of the following 18 leading Digital IX service providers featured on the Digital IX Services PEAK Matrix:

- **Leaders:** Accenture Interactive, Cognizant, Deloitte, IBM iX, Isobar, and Publicis Sapient
- **Major Contenders:** Brillio, Digitas, Infogain, Ogilvy, PwC, TCS Interactive, UST Global, VMLY&R, Wipro, and Zensar
- **Aspirants:** Mphasis and Stefanini

Scope of this report:



Geography
Global



Service providers
18 leading IX service providers



Services
IX services

Overview and abbreviated summary of key messages

This report examines 18 IT service providers/digital agencies in delivering Digital Interactive Experience (IX) Services. It focuses on service provider position and growth, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key service provider profiles.

Some of the findings in this report, among others, are:

Service provider delivery capability

- Digital IX service providers can be categorized into leaders, major contenders, and aspirants
- Accenture Interactive, Publicis Sapient, Isobar, Cognizant, Deloitte Digital and IBM iX are the current leaders in the space

Emerging service provider trends

- Leaders have showcased strong ability to carry out large scale experience transformation engagements that includes consulting, design, research, and technology execution
- They have also developed an evolved vision of the space by focusing on domain centricity, next generation technologies, stakeholder experience, and purpose-led design
- Leaders are also focused on “local yet global” approach to design engagements through enhanced delivery footprint

Changing market dynamics

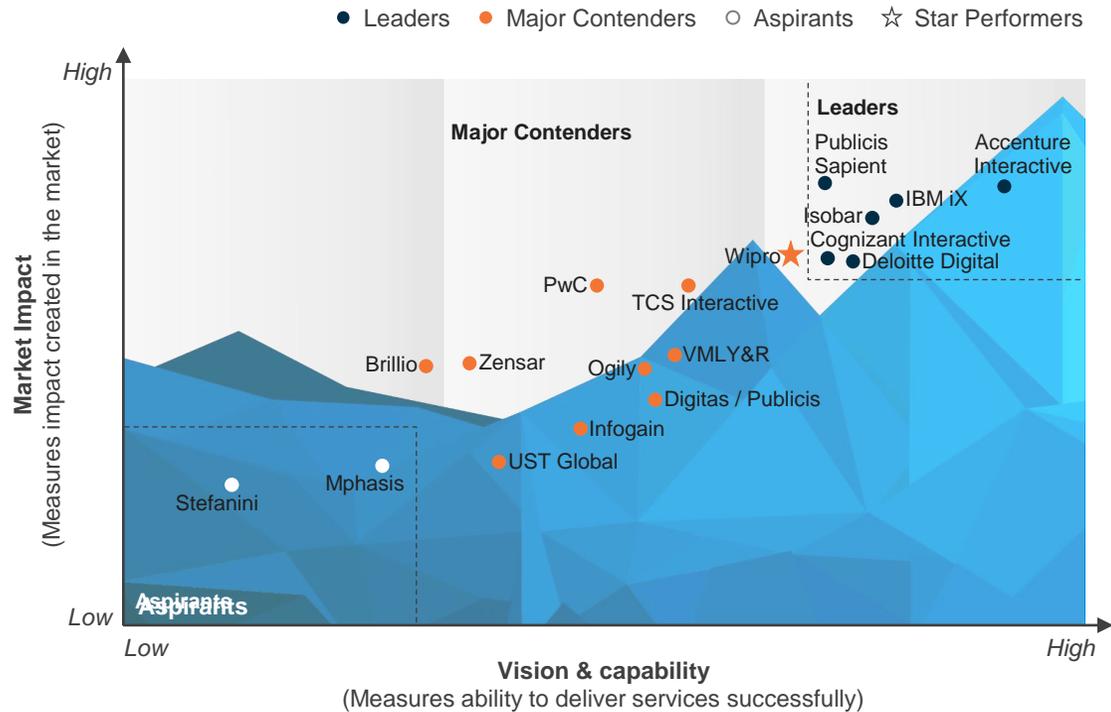
- The market for digital interactive experience is witnessing a change ushered in by the pandemic
- There is an increased focus on at-home and touchless experiences
- Moreover, the pandemic has put a spotlight on employee experience with companies having to re-examine their employees’ safety and concerns that got further aggravated by the remote delivery model

The way forward

- While the spotlight will continue to be on designing “persuasive and engaging” engagements, there will be a tangible shift in the definition of persuasion and engagement
- The current conversations around digital fatigue, responsible design, humane experience will make enterprises re-examine the value their brand is delivering to the customers

This study offers three distinct chapters providing a deep dive into key aspects of digital IX services market; below are three charts to illustrate the depth of the report

Digital Interactive Experience Services (IX) PEAK Matrix® Assessment 2020^{1,2,3}



Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	○	●	●	●	○	●	○	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	●	●	●	○	○	○	○
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	○	○	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	●	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	○	●	○	●	○	○	○	○

Strengths

- Strong focus on adopting a verticalized approach through industry-focused groups and solutions/platforms
- Strong focus on building data capabilities to drive real-time, personalized solutions and offerings
- Follows a consulting-led approach to experience design and transformation
- Has developed strong end-to-end capabilities to drive experience agenda for its clients. This includes strategy and consulting, experience design, technology and engineering, data and AI, innovation, and digital product management

Areas of improvement

- Limited delivery footprint, highly skewed toward American and European markets
- May not be suited for a small or medium-sized enterprise not looking for end to end experience transformation
- Needs to improve and match the commercial flexibility showcased by comparable peers

1 PEAK Matrix specific to Digital Interactive Experience (IX) services
 2 Assessments for Deloitte Digital, PwC, Accenture, IBM iX, Digitas, Ogily, VMLY&R, Publicis Sapient, TCS, and Isobar excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with insurance buyers
 3 Assessment for Cognizant includes partial inputs from the service provider, and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, service provider public disclosures, and interaction with buyers
 Source: Inputs from market players, recruitment firms, and investment agencies

Research calendar – Digital Services

■ Published
 ■ Planned
 ■ Current release

Flagship Digital Services reports

	Release date
Digital Services – Market Report 2020: Digital Transformation: Triumph Beyond Technology Adoption	May 2020
IoT Services State of the Market Report 2020 Driving Impact Beyond the Horizons of Operational Efficiency	July 2020
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2020	September 2020
Digital Interactive Experience (IX) Service Provider Compendium	October 2020
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2020	October 2020
Artificial Intelligence (AI) Service Provider Compendium	October 2020
Digital Interactive Experience (IX) Services State of the Market Report 2020	Q4 2020
Artificial Intelligence (AI) Services State of the Market Report 2020	Q4 2020

Thematic Digital Services reports

Customer Experience Trailblazers – Experience Spearheading the Digital Economy	February 2019
BigTech Battle: Digital Experience Platforms Assessment – Rise of the Digital Experience Platform	June 2019
AI Masterclass Recalibrate Your AI Impact – Insights from 230 AI Use Cases Across Industries	October 2019
Experience Design: Re-architecting the Trust Equation Through a Human-centered Design Approach	June 2020
Trailblazer: Customer Data Platforms	Q4 2020
BigTech Battle: MarTech	Q4 2020
BigTech Battle: Edge Computing Platforms	Q4 2020

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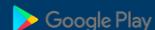
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Podcast

DigitalReallTy



Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

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