

Digital Interactive Experience (IX) Service Provider Compendium 2021

October 2020: Complimentary Abstract / Table of Contents



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- Accelerators™
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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

The digital IX services report has profiles and buyer case studies for 18 service providers

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

Service provider | Digital IX services profile (page 1 of 3)

Overview

Strengths

- Very strong market proof points across key sectors, with the ability to execute end-to-end transformation engagements
- Strong delivery footprint supplemented by investments in innovation/experience studios and acquisitions of local agencies
- Has made significant investments in bridging the demand-supply gap for key skills in experience services
- Has formed strong experience-centric partnerships with Adobe, IBM, Oracle, and SAP Hybris

Revenue from digital interactive

>US\$251 million	US\$151- US\$251 million	<US\$150 million
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Scope of services

Service provider provides end-to-end solutions to clients for creating digital experiences. Its experience capabilities are centered around designing, building, communicating, and running experiences. It helps enterprises accomplish this by helping them reimagine products, services, and operating models through a platform-led strategy. It also assists clients in scaling their marketing, media, content, and commerce programs.

Revenue by geography

North America	South America	Asia Pacific
Europe (excluding UK)	UK	Middle East & Africa

Revenue by buyer size

Small (annual revenue < US\$1 billion)	Medium (annual revenue = US\$1-US\$5 billion)	Large (annual revenue = US\$5-US\$10 billion)	Very large (annual revenue > US\$10 billion)
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Areas of improvement

- Relationship management can cause client churn, especially in the mid-market
- Perceived to be an end-to-end transformation partner, less suited to the needs of small and mid-market players
- An acid integrator

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

Service provider | Digital IX services profile (page 2 of 3)

Case studies and solutions

Case study 1

Reinvented the customer experience for a leading British-American cruise operator

Business challenge The client wanted to deliver personalized, relevant experiences to transform guest experience

Solution and impact Service provider helped to transform the cruise experience by scaling made-for-me experiences for passengers by embedding digital technologies into the physical environment of ships that could sense and respond to guests' needs

- It designed Ocean guest experience platform with a secure Experience Internet of Things (oIoT) network and streaming analytics
- It designed OceanMosaic, a wearable device for guests on the ship. It helped to identify guests for tailored recommendations and unified cabin access, while linking to interactive portals and other digital experiences through the ship
- This led to reduction in waiting time by 90% from 10 minutes to 30 seconds and generated up to 40 million intelligence events per ship every day

Case study 2

Developed an operating model to optimize customer experience for a leading QSR chain

Business challenge To optimize digital touchpoints with a view to drive efficiency and growth

Solution

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

Service provider | Digital IX services profile (page 3 of 3)

Investments and partnerships

Digital interactive investments (representative list)

Investment theme	Details
Acquisitions	<ul style="list-style-type: none"> In May 2020, acquired XXX, an organization design consultancy headquartered in New York City, to expand its C-suite offerings pertaining to people/employee experience In February 2020, acquired XXX. The company has experience in innovation and product strategy, product, software, and user experience design, and prototyping. The acquisition will strengthen service provider's capabilities to help clients benefit from the merging of physical products and digital services In April 2020, acquired XXX, a Business-to-Business (B2B) marketing services agency to strengthen and scale service provider's B2B marketing services, such as account-based marketing, customer advocacy, sales enablement, and marketing automation In November 2019, acquired XXX to enhance its capabilities in marketing strategy and the ability to help brands deliver relevant experiences at scale across all customer touchpoints Has continued to strengthen its data and analytics capabilities through a series of acquisitions that include XXX (July 2020), XXX (May 2020), XXX (October 2019), etc.
Innovation hubs	<ul style="list-style-type: none"> Invested in multiple innovation hubs in Mumbai, Pune, and Hyderabad to provide immersive environments for clients to co-innovate across advanced technologies such as extended reality, artificial intelligence, the internet of things, blockchain, and quantum computing Expanded innovation hub in Chicago with a new Industry X.0 studio to help clients accelerate the development of new smart connected products and services
Design studio	In November 2019, service provider opened the first Fjord design studio in Tokyo to bring design-led strategy, service design, and organizational/cultural innovation to create digital services and support the business transformation of Japanese clients

Digital interactive partnerships (representative list)

Partner name	Type of partnership	Details
Partner 1	Technology	Partnered with XXX to leverage its experience cloud, a connected suite of cross-channel digital marketing solutions
Partner 2	Technology	Leverages XXX for digital asset management solutions and web content management services
Partner 3	Technology	Partnered with XXX to leverage its solutions for designing, implementing, and driving transformational experiences
Partner 4	Technology	Has been named Global SI Partner of the Year for the 15th time in 2020, recognized for its commitment to customers, solutions' impact on the market, and exemplary use of XXX technologies.

Recent activity

Development	Details
Center	In January 2020, opened innovation center for situational awareness in Singapore. The center's goal is to enable public safety organizations to deliver better services and public safety outcomes to the communities they serve

Recent awards and recognitions (representative list)

Awards

- In February 2019, service provider won GLOMO award for a virtual reality mobile application
- In November 2019, service provider won gold in the digital agency of the year category in Campaign's 2019 Agency of the Year awards
- Recognized as XXX digital experience partner of the year, for its ability to deliver unique and disruptive customer experiences

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 2021	October 2020
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2020	Q4 2020
Artificial Intelligence (AI) Service Provider Compendium	Q4 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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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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