

Marketing Services – Provider Compendium 2023

April 2023: Complimentary Abstract / Table of Contents



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Locations: costs, skills,
sustainability, portfolios

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Introduction

Marketing is undergoing a transformative journey as a result of rapid developments in technology, coupled with changing customer preferences. As these technological advances become more accessible to people, interactive Customer Experience (CX) becomes critical for CMOs in developing their enterprise marketing strategy. This, coupled with the impending recession, has further added to the pressure on marketing teams to deliver more with less.

The provider ecosystem is also shifting gears from product-focused traditional marketing services to innovative, data-driven strategies that focus on customer experience. They are further exploring flexible and cost-efficient delivery models to cater to CMOs' demand for low-cost solutions around personalization, loyalty, and interactive experiences. Providers not only continue to invest in intelligent automation tools and solutions that enhance their scale of services and process efficiencies but are also exploring new technologies and platforms for augmented customer experience.

In this research, we present an assessment and detailed profiles of marketing service providers featured on the Marketing Services PEAK Matrix®. Each service provider deep dive provides a comprehensive picture of its service focus through a snapshot of its key strengths and limitations, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process, interactions with leading service providers, client reference checks, and ongoing analysis of the marketing services market.

This report includes the profiles of the following 31 marketing service providers featured on the [Marketing Services PEAK Matrix® Assessment 2023](#):

- **Leaders:** Accenture, Cognizant, Deloitte Digital, Infosys, Merkle, Publicis Sapient, TCS, and Wunderman Thompson
- **Major Contenders:** Capgemini, Concentrix, Dentsu Creative, Digitas, eClerx, Epsilon, EXL, HCLTech, IBM, Majorel, Media.Monks, Performics, PwC Digital, RRD GO Creative, Tech Mahindra, and Wipro
- **Aspirants:** Dialog Direct, HGS, HH Global, Startek, Stefanini, Webhelp, and WNS

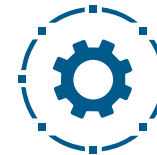
Scope of this report



Geography
Global



Service providers
31 marketing service providers



Services
Marketing services

Overview and abbreviated summary of key messages

Everest Group’s Marketing Service Provider Compendium 2023 provides accurate, comprehensive, and fact-based snapshots of 31 marketing services providers. The compendium will enable providers to benchmark their capabilities against their competitors, while buyers of marketing services will be able to assess the providers based on their desired set of capabilities.

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

Everest Group Marketing Services PEAK Matrix® Assessment 2023

Everest Group classifies 31 marketing services providers on the Everest Group Marketing Services PEAK Matrix® into three categories of Leaders, Major Contenders, and Aspirants

- Accenture, Cognizant, Deloitte Digital, Infosys, Merkle, Publicis Sapient, TCS, and Wunderman Thompson are the Leaders
- Major Contenders include Capgemini, Concentrix, Dentsu Creative, Digitas, eClerx, Epsilon, EXL, HCLTech, IBM, Majorel, Media.Monks, Performics, PwC Digital, RRD GO Creative, and Wipro
- Dialog Direct, HGS, HH Global, Startek, Stefanini, Webhelp, and WNS are the Aspirants

Everest Group also identified Capgemini, Concentrix, and Merkle as the Star Performers. This recognition is based on these providers’ relative year-over-year movement on the PEAK Matrix®.

Key insights on marketing services providers

- The report provides an overview of each provider and any recent developments/investments made by them
- It provides insights on provider client portfolios, their key delivery locations, and their proprietary tools/solutions
- It highlights the key strengths and limitations of providers, as assessed by Everest Group

The marketing services provider compendium report 2023 has 31 provider profiles

Marketing Services – Provider Compendium 2023

Provider 1 | marketing services profile (page 1 of 3) Overview

Company overview

Provider 1 is a global leader in tech-enabled creative production and procurement. It provides marketing production, marketing technology, and creative services for print, digital, and retail media. The firm also provides a variety of marketing materials, including print and packaging procurement, supported by advanced digital platforms, allowing businesses to streamline their supply chains and reduce operational expenses.

Headquarters: Website: www.xyz.com

Key leaders

- Leader 1, Group Chief Executive Officer
- Leader 2, Chief Executive Officer, Digital
- Leader 3, Chief Technology Officer

Suite of services	Depth of services		
Customer	[Progress bar]		
Content	[Progress bar]		
Campaign	[Progress bar]		
Marketing support	[Progress bar]		
Media channels	[Progress bar]		

Marketing services	2020	2021	2022 (as of August 2022)
Revenue (US\$ million)			40-60
Number of FTEs	Not available		500-1000
Number of clients			Not available

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Recent marketing services-related developments/investments Low High

Areas

Technology

Marketing Services – Provider Compendium 2023

Provider 1 | marketing services profile (page 2 of 3) Proprietary technology solutions/tools

Technology name	Processes served	Year launched	Description
Technology 1	Not available	Not available	This solution provides customized web storefronts for all in simple to use. It is available in 16 languages and 38 currencies from a single platform
Technology 2	Not available	Not available	This solution supports workflow automation by offering an i providers to receive the correct file at the appropriate time
Technology 3	Not available	Not available	This solution eliminates tedious calculations in establishing the proper signage to be deployed to the ideal area for imp
Technology 4	Not available	Not available	This solution facilitates data access by offering relevant, ac and dashboards
Technology 5	Not available	Not available	This solution is a marketing execution platform that provide throughout campaign creation and execution

Talent

Creative and media

Other

Note: This list is illustrative and non-exhaustive

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Marketing Services – Provider Compendium 2023

Provider 1 | marketing services profile (page 3 of 3) Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision & capability			
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation and investments	Delivery footprint
[Gauge]	[Gauge]	[Gauge]	[Gauge]	[Gauge]	[Gauge]	[Gauge]	[Gauge]

Strengths

- Provider 1 is a global creative production, commercial printing, and procurement company. It offers marketing services solutions such as creative strategy, content production, email marketing, and campaign management
- In recent years, it has made multiple investments to ramp up its marketing services capabilities such as the acquisition of Noosh, a global marketing technology provider, Adare International, a UK-based creative agency, and GBG, an expert in identity data intelligence
- It has global presence with 26 creative studios across 15 countries, and has recently made investments to augment its SEA presence with a new office in Vietnam and expansion in Indonesia

Limitations

- Provider 1 has limited expertise in providing services such as loyalty management, commerce, social media management, lead management, and multichannel marketing
- It has an onshore-heavy delivery model that may be a deterrent for buyers looking for a more balanced shoring mix
- It lacks a technology infrastructure and automation-based tools and solutions dedicated to marketing services, which hinders its ability to provide holistic digital solutions to its clients

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Research calendar

Marketing Services

Published Planned Current release

Reports title	Release date
Marketing Services Provider Compendium 2022	March 2022
Marketing Services Adoption in Retail & Consumer Product Goods (CPG) Global Business Services (GBS)	May 2022
The Growing Need for Inclusive Talent Models: Learning from Impact Sourcing Specialists	May 2022
Impact of the Pandemic on the Global Media Market	May 2022
Impact Sourcing Specialist Profiles 2022	June 2022
BPS Top 50 – 2022	June 2022
A New Paradigm of Marketing Beckons: Marketing Services State of the Market Report 2022	November 2022
Dawn of the Planet of the Bots: Intelligent Automation and Marketing Services	December 2022
Marketing in a Permacrisis: a CMO Survival Toolkit	January 2023
Marketing Services PEAK Matrix® Assessment 2023	February 2023
The X, Y, Z of Marketing	March 2023
Marketing Services – Provider Compendium 2023	April 2023
Deliver From Everywhere: the Next Epoch of Marketing Services	Q2 2023
Alternatives to Third-party Data	Q2 2023
Marketing Services State of the Market 2023	Q2 2023

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