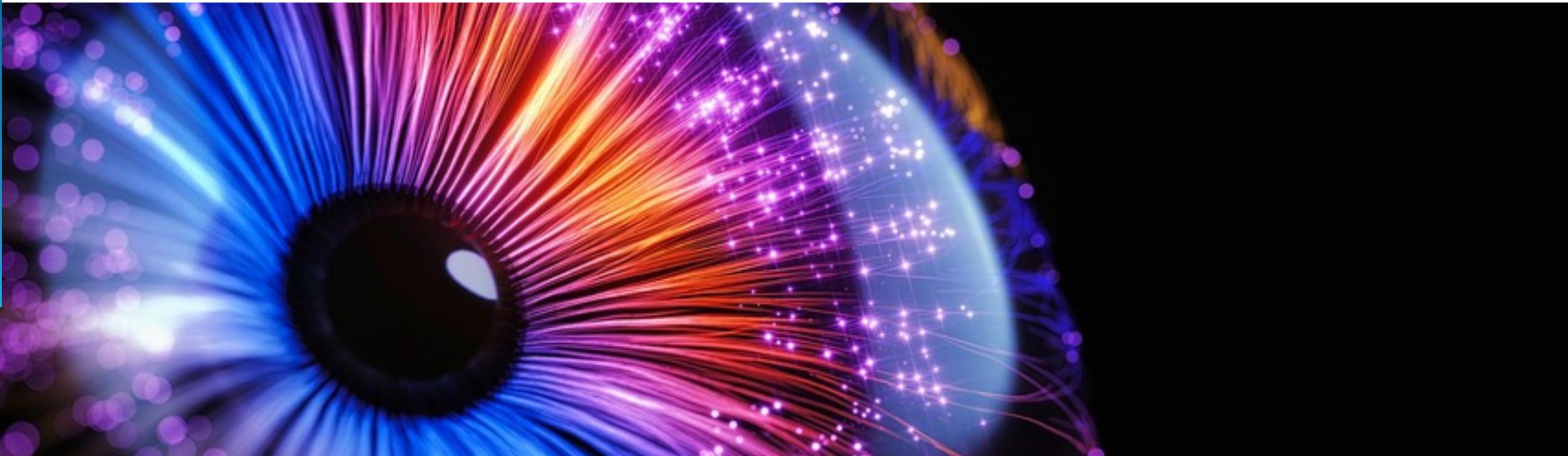


# Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023 – North America

November 2023: Complimentary Abstract / Table of Contents



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This report is included in the following research program(s):

## Interactive Experience (IX) Services

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- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
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## Background of the research

In North America, enterprises are tightly interweaving the growing importance of experience design with their investments in emerging technologies such as generative AI, metaverse, and blockchain. Customers no longer view a captivating and well-tailored experience as a mere luxury; it has become an imperative. North American consumers are not only demanding top-notch services but also craving seamless, personalized, and ethically conscious interactions with enterprises. In parallel, businesses are recognizing that, in their quest to attract and retain top talent, creating a thoughtfully designed employee experience across the interaction touchpoints of the employee lifecycle has become vital. Moreover, experience design is extending its influence to partners, as efficient and user-friendly interfaces are becoming the linchpin for successful collaboration and mutual growth. As the narrative evolves, North American society itself is placing a premium on sustainability and ethical business practices. In summary, experience design, bolstered by investments in cutting-edge technologies, is not just a trend but a fundamental driver for business growth and social responsibility in North America. It profoundly shapes the future and impact of enterprises in the region, aligning their operations with the values and aspirations of a rapidly changing market.

In this research, we present an assessment of 26 service providers featured on the Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023 – North America, a comprehensive matrix that evaluates and categorizes service providers in terms of their capabilities in the space.

The assessment is based on Everest Group's annual Request for Information (RFI) process for calendar year 2023, interactions with leading IX service providers, client reference checks, and an ongoing analysis of the IX services market.

### Scope of this report



**Geography**  
North America



**Providers**  
26



**Services**  
Digital Interactive  
Experience (IX) services

## Overview and abbreviated summary of key messages

This report examines 26 IT service providers/design 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 Interactive Experience (IX) service providers can be categorized into leaders, major contenders, and aspirants
- Accenture Song, Deloitte Digital, IBM iX, Merkle, Publicis Sapient, and TCS Interactive are the current leaders in the space

### Emerging service provider trends

- Leaders display strong ability to deliver end-to-end experience transformation engagements with robust offerings and market proof points across design, strategy, and technology services in the North America region
- Leaders have made strong investments in carving out a well-defined internal strategy, which is also reflected in external branding to enhance “permission to play” in the experience ecosystem
- Leaders have strong value proposition messaging centered around designing sustainable, responsible, and ethical experiences

### Changing market dynamics

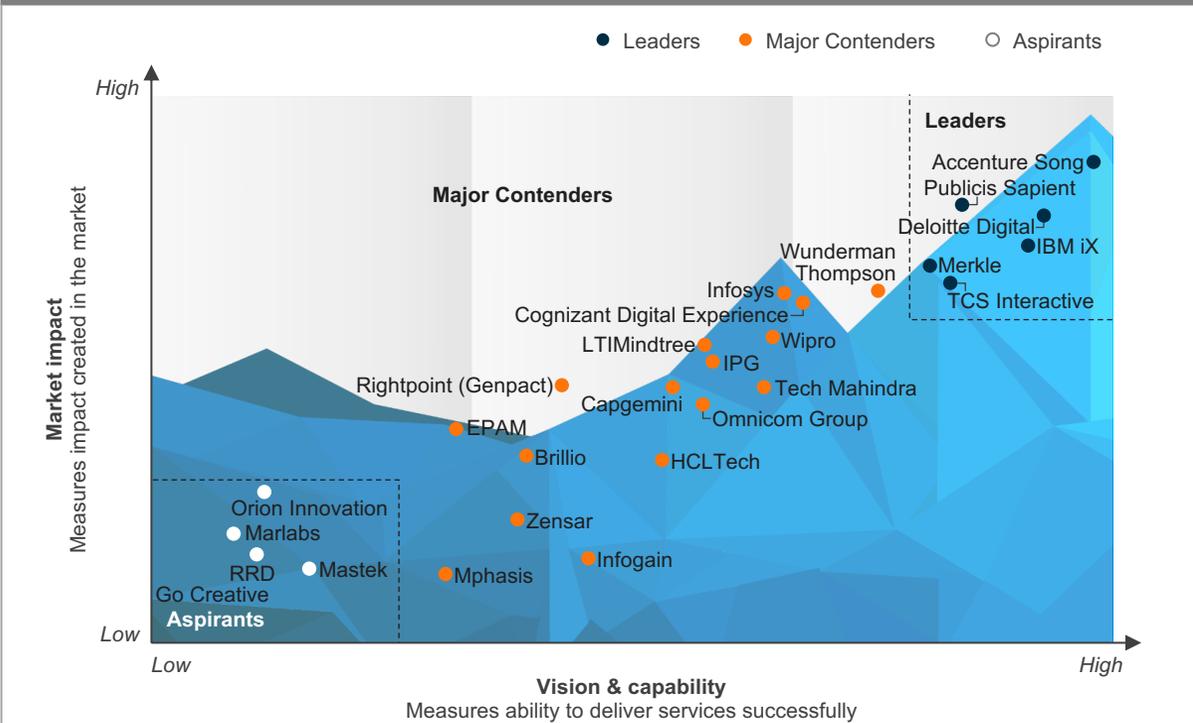
- The definition of experience design is evolving with an extended focus on customers, employees, partners, and environment
- Service providers are building novel design capabilities whereas design agencies are expanding operations in implementation and support services

### The way forward

- Service providers who are building end to end capabilities across creatives and technology services in the experience space will sustain the growing competition in the ecosystem
- AI investments across the stakeholder experience value chain will drive future growth for both service providers and design agencies in the Interactive Experience space

# This study offers distinct chapters providing a deep dive into key aspects of Digital Interactive Experience (IX) Services North America market; below are three charts to illustrate the depth of the report

Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023 – North America<sup>1,2</sup>



1 Assessments for Wunderman Thompson, IPG, Publicis Sapiant, Accenture Song, Deloitte Digital, Tech Mahindra, Capgemini, HCLTech, IBM iX, EPAM, and Omnicom Group 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 IX services buyers

2 Assessment of Infogain includes partial inputs from the service provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, service providers' public disclosure, and interaction with buyers

Source: Everest Group (2023)

Capability assessment Illustrative example

Measure of capability: 🔄 Low ● High

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

Everest Group's remarks on providers Illustrative example

Measure of capability: 🔄 Low ● High

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**

- It has a sharp focus on emerging constructs such as generative AI, metaverse, and content supply chain through partnerships, acquisitions, solutions, and talent investments
- It has a strong play in the North American market with its narrative around personalization and identity resolution, supported by investments into building a range of product offerings in these categories

**Limitations**

- Though it has made investments to augment its onshore presence, its experience services operations are still skewed toward offshore locations, which might be a deterrent for clients looking for more localized support
- While it has a strong presence in the services pertaining to CX, it can further enhance its service offerings across EX, PX, and SX

# Research calendar

## Interactive Experience (IX) Services

Published Planned Current release

Reports title	Release date
Digital Commerce Platform PEAK Matrix® Assessment 2023	March 2023
Digital Commerce Platform Provider Compendium 2023	March 2023
Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023	May 2023
Customer Data Platform (CDP) Products Provider Compendium 2023	June 2023
Generative AI – Revolutionizing the Creative Design and Development Process	May 2023
Customer Journey Orchestration: Empowering Personalized CX Across Touchpoints	July 2023
Digital Commerce Platform State of the Market 2023	August 2023
<b>Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023 – North America</b>	<b>November 2023</b>
Digital Interactive Experience (IX) Services – Provider Compendium 2023 – North America	Q4 2023
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023 – Europe	Q4 2023
Digital Interactive Experience (IX) Services – Provider Compendium 2023 – Europe	Q4 2023
Customer Data Platform (CDP) State of the Market 2023	Q4 2023
Voice of Stakeholder (VoS) Compendium Report 2023	Q4 2023
Unlocking the Stakeholder Experience for Employees, Partners and the Society	Q4 2023
Digital Experience Platform PEAK Matrix® Assessment 2023	Q4 2023

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