

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

November 2023: Complimentary Abstract / Table of Contents



# Our research offerings

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

## Interactive Experience (IX) Services

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at [info@everestgrp.com](mailto:info@everestgrp.com)

Learn more about our  
**custom research capabilities**

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,  
risk, technologies

Locations: costs, skills,  
sustainability, portfolios

# Contents

<b>1. Introduction and overview</b>	<b>5</b>
• Research methodology	6
• Key information on the report	7
• Introduction	8
• Focus of the research	9
<b>2. Digital IX PEAK Matrix® characteristics</b>	<b>10</b>
• Summary of key messages	11
• PEAK Matrix framework	13
• Everest Group PEAK Matrix for Digital IX Services	14
• Characteristics of Leaders, Major Contenders, and Aspirants	15
• Service provider capability summary dashboard	16
<b>3. Enterprise sourcing considerations</b>	<b>20</b>
• Leaders	20
– Accenture Song	21
– Capgemini	22
– Deloitte Digital	23
– Merkle	24
– Publicis Sapient	25
– Wunderman Thompson	26
• Major Contenders	27
– Atos	28
– Cognizant Digital Experience	29
– HCLTech	30

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

**Nitish Mittal**, Partner

**Nisha Krishan**, Practice Director

**Kyatham Manaswini**, Senior Analyst

**Vaani Sharma**, Senior Analyst

# Contents

• Major Contenders (continued)	
– IBM iX	31
– Infosys	32
– IPG	33
– LTIMindtree	34
– Omnicom Group	35
– TCS Interactive	36
– Tech Mahindra	37
– Wipro	38
• Aspirants	39
– EPAM	40
– Mastek	41
– Orion Innovation	42
– Zensar	43
<b>4. Appendix</b>	<b>44</b>
• Glossary	45
• Research calendar	46

## Introduction

European enterprises are rapidly embracing user experience design, prioritizing seamless interactions across customer, employee, and partner domains. Their dedication to excellence is grounded in a commitment to sustainability and ethical practices, extending to the development of holistic stakeholder experiences for the eco-conscious European consumer base. Concurrently, these enterprises are actively investing in cutting-edge technologies such as Generative AI, Blockchain, and the Metaverse, reinforcing their leadership in design innovation.

In the realm of creative design services, Global System Integrators (GSIs) are emerging as formidable competitors to native design agencies in the region, reflecting a comprehensive and forward-thinking approach. By blending technology, sustainability, and superior design, European enterprises are strategically positioned at the forefront of this dynamic business landscape, where creativity converges with technological advancements to shape the future of user experiences..

In this research, we present an assessment of 21 service providers featured on the Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – Europe 2023, 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 the 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**  
Europe



**Digital IX providers**  
21



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

## Overview and abbreviated summary of key messages

This report examines 21 IT service providers/design agencies in delivering Digital Interactive Experience (IX) Services in Europe. 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, Wunderman Thompson, Merkle, Publicis Sapient, and Capgemini 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 Europe region
- Leaders have made strong investments in carving out a well-defined internal strategy, which is also reflected in their 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

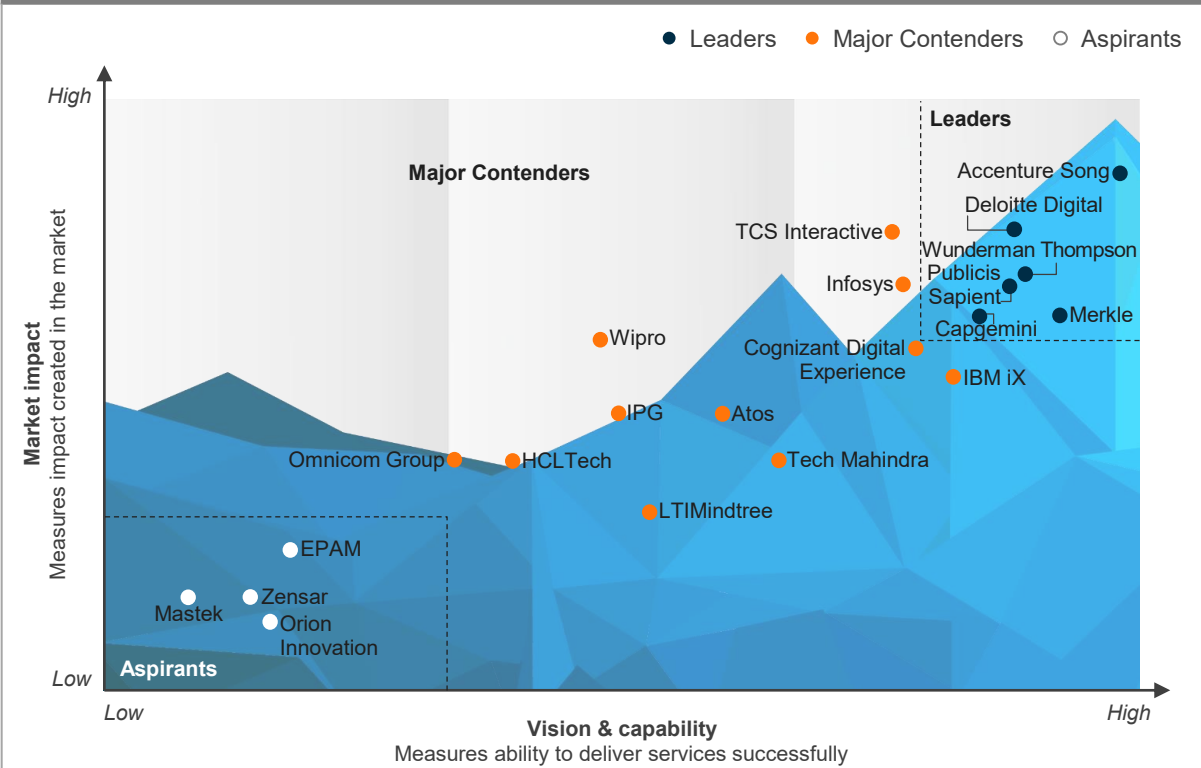
- The definition of experience design is evolving with an extended focus on customers, employees, partners, and society
- Service providers are building novel design capabilities whereas design agencies are expanding operations in implementation and support services

### The way forward

- Service providers who are building end-to-end capabilities across creative 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
- Sustainability-led narrative will become a key differentiator for service providers/design agencies in the European region

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

Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023 – Europe<sup>1</sup>



1 Assessments for Accenture Song, IBM iX, IPG, Omnicom Group, Atos, Deloitte Digital, EPAM, HCLTech, Tech Mahindra, Capgemini, Publicis Sapient, and Wunderman Thompson exclude 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

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

**Strengths**

- It has a strong presence in the Europe region with a primary focus in UK&I and DACH region where it leads with a robust consulting-led GTM strategy aided by its market brand perception
- It is placing strong bets in the generative AI space with enhanced partnerships with AWS, Google, and Salesforce

**Limitations**

- Its creative and design-focused acquisitions still leave room for enhancement of its brand image as a provider of creative services as compared to some of its peers
- It needs to work on providing a consistent client experience across its various regions of operations

# Research calendar

## Interactive Experience (IX) Services

■ Published ■ Planned ■ Current release

Reports title	Release date
Adobe Services PEAK Matrix® Assessment 2022	September 2022
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
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – North America 2023	November 2023
<b>Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – Europe 2023</b>	<b>November 2023</b>
Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023	Q4 2023
Digital Interactive Experience (IX) Services in Europe – Provider Compendium 2023	Q4 2023
Customer Data Platform (CDP) State of the Market 2023	Q4 2023
Voice of Stakeholder (VoS) Compendium Report 2023	Q4 2023
Digital Experience Platform PEAK Matrix® Assessment 2023	Q4 2023

Note: [Click](#) to see a list of all of our published Interactive Experience (IX) Services reports





Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at [www.everestgrp.com](http://www.everestgrp.com).

## Stay connected

**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

**Toronto**  
canada@everestgrp.com  
+1-214-451-3000

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*

**Website**  
[everestgrp.com](http://everestgrp.com)

**Social Media**  
 @EverestGroup  
 @Everest Group  
 @Everest Group  
 @Everest Group

**Blog**  
[everestgrp.com/blog](http://everestgrp.com/blog)

## NOTICE AND DISCLAIMERS

**IMPORTANT INFORMATION. PLEASE REVIEW THIS NOTICE CAREFULLY AND IN ITS ENTIRETY. THROUGH YOUR ACCESS, YOU AGREE TO EVEREST GROUP'S TERMS OF USE.**

Everest Group's Terms of Use, available at [www.everestgrp.com/terms-of-use/](http://www.everestgrp.com/terms-of-use/), is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.