IDC MarketScape

IDC MarketScape: Worldwide Experience Build Services 2025 Vendor Assessment

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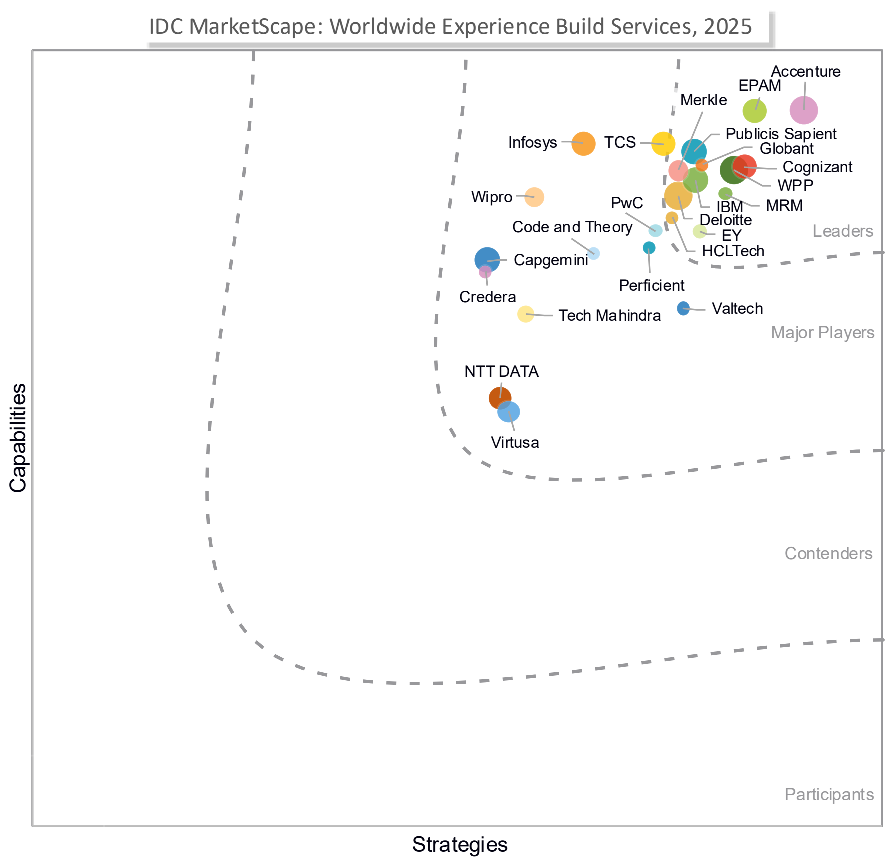
THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Experience Build Services Vendor Assessment



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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Experience Build Services 2025 Vendor Assessment (Doc # US52973125).

IDC OPINION

This IDC study represents a vendor assessment of the 2025 experience build services market through the IDC MarketScape model. It is an update of *IDC MarketScape: Worldwide Experience Build Services 2023–2024 Vendor Assessment* (IDC #US49988323, December 2023). This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate the vendor's ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide experience build market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing experience build services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of experience build services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions.

Key findings from reference client calls include the following:

- Feedback from calls with reference clients indicates that in the experience build space, buyers are impressed most by the *quality of the professionals* that vendors deploy, a finding that matches the findings from reference client calls in the 2023 assessment.
- This was followed by vendors' *client understand and insight,* in second place, which also matches the findings from reference client calls in the 2023 experience build assessment.
- The third highest area in terms of average reference client feedback in the experience build space was vendors' *pragmatic creativity,* a new question which replaced "innovation and creativity" question in the 2023 assessment. Pragmatic creativity measures a vendor's ability to balance creativity and innovation on one hand, with value-focused pragmatism on the other.
- The experience design area where reference clients were least impressed with vendors was in vendors' *ability to drive value through experience build activities.* This represents a potentially worrying break with the findings of the 2023

reference calls, where ability to drive value through experience build activities was the third strongest area for vendors on average. This does, however, agree with conversations and anecdotal feedback from enterprises that IDC has talked to in 2025, to the effect that enterprises' investments in martech and in accompanying customer experience (CX) services are not currently generating a strong return on investment. However, it is worth noting that the 2025 field survey found survey by contrast gave a high rating on average to vendors' ability to drive value through experience build activities. It could be that the difference between the two results comes from reference clients being more demanding in business terms, perhaps as a result of often being experienced and mature services buyers.

Key findings from the worldwide field survey of buyers of experience design and build services in 2025 include the following in the experience build space:

- Feedback from IDC's 2025 *Global Experience Design and Build Buyer Perception Survey* indicates that in the experience build space, buyers are impressed most by the *quality of the professionals* that vendors deploy. As well as matching the findings of the 2025 reference client calls, this matched the finding of the 2023 field survey.
- In the experience build space, people quality was followed in second place in the 2025 field survey by *client understanding and insight,* which matches both the findings of the 2025 reference client calls and the findings of the 2023 worldwide field survey.
- This was followed in third place by vendors' *ability to drive value through experience build activities.* This matches the finding of the 2023 worldwide filed survey, in which value creation through experience build was also in third place. As mentioned previously, however, this diverges from the findings of the reference client calls, where value creation from experience build was given a relatively low rating in reference client calls.

Regarding the areas assessed by IDC, rather than by vendors' clients:

- Vendors in this assessment, on average, were rated highest in the experience build space for their *data and analytics capabilities.* The ability to build and deploy strong data and analytics capabilities for enterprise clients is often an important part of the creation or transformation of customer-facing experiences, given the importance of continually monitoring and understanding consumers and customers. Many of the vendors in this assessment have strong and long-established capabilities around data and analytics, which they assembled long before they began to focus strongly on CX services, and these vendors have used these capabilities to enter and compete strongly in the CX services space.

- This was followed by vendors' *supporting assets and capabilities.* These include tools, frameworks benchmarks, and methodologies that help vendors deliver scalable services that are cost-effective with delivery risks minimized. They are a generic "table stakes" requirement for providing all sorts of services, not just experience build services. Vendors' strength on average in this area demonstrates the extent to which the more successful vendors in the experience build market are often those with mature IT services delivery machines.
- This in turn was followed by vendors' *personalization* capabilities. Personalization is a strong priority for most, if not all, CMOs and CIOs today, and building great customer experiences for enterprise clients necessarily involves for vendors the ability to embed customer experiences with a personalized element.

The success of customer-facing and consumer-facing products and services is often driven by two factors: how well targeted to their users and how well they can continually adapt to changing conditions at ground level, where the customer or consumer interacts with the brand. Together, personalization services and data and analytics services — supported by strong assets and tools — represent foundational capabilities for vendors in the experience build space and help ensure that new products and services land successfully with consumers and customers and deliver great experiences for customers and users over time.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This assessment is part of a joint assessment during 2025 that produced two documents: *IDC MarketScape: Worldwide Experience Design Services 2025 Vendor Assessment* (IDC #US52973225, forthcoming) and *IDC MarketScape: Worldwide Experience Build Services 2025 Vendor Assessment* (IDC #US52973125, forthcoming).

Three of the main four categories of CX services providers, as laid out in *IDC Market Glance: CX Services, 2Q25* (IDC #US52469525, June 2025), are represented. These are services providers, independent agencies, and advertising and marketing groups. The fourth category, design houses, is not represented as these vendors do not supply a broad enough range of experience design and experience build services to qualify for inclusion in these assessments.

Within the *services providers* category, three "vendor archetypes" are represented in both the experience design and the experience build assessments:

- McKinsey, BCG, and Bain represent the "strategy houses" archetype. The strategy houses do not have large-scale global IT implementation capabilities and appear only in the experience design assessment.

- Deloitte, EY, and PwC represent the "Big Four" multidisciplinary professional services firms (KPMG is not assessed in this document).
- The "global consulting and IT services firms" are represented by Accenture, Capgemini, Cognizant, EPAM, Globant, HCL, IBM, Infosys, NTT DATA, Perficient, Tata Consultancy Services (TCS), Tech Mahindra (via BORN Group), and Wipro.

For more on the CX services archetypes, see *IDC PlanScape: Future of Customer Experience — Implementing Customer Experience Suites Using a CX Services Partner* (IDC #US49971223, February 2023).

Independent agencies are CX services firms that come from a heritage of marketing or advertising and are not owned by a holding company, an IT services provider, or a business or IT consultancy. Within the independent agencies category, Valtech and Virtusa are represented in the experience design and the experience build assessments.

Advertising and marketing groups are global holding companies and their subsidiaries. These subsidiaries include traditional creative agencies but now also include IT and business consultancies. Many holding company subsidiaries combine traditional creative capabilities with experience design, business consulting, IT consulting, and IT implementation services. Six of the major worldwide holding companies are represented in the experience design and the experience build assessments: dentsu (via Merkle), Interpublic (via MRM), Omnicom (via Credera), Publicis (via Publicis Sapient), Stagwell (via Code and Theory), and WPP.

Within the category of services providers, inclusion criteria for both assessments included the vendor being a top 10 provider of CX services by 2023 revenue, the vendor having revenue of at least $500 million in experience design and build revenue, and the vendor having global practices dedicated to experience design and build activities.

Vendors placed in the "Leaders" category in *IDC MarketScape: Worldwide Experience Design Services 2023–2024 Vendor Assessment* (IDC #US49988123, December 2023) qualified for the experience design assessment. Vendors placed in the "Leaders" category in *IDC MarketScape: Worldwide Experience Build Services 2023–2024 Vendor Assessment* (IDC #US49988323, December 2023) qualified for the experience design assessment. In addition, vendors placed in the "Leaders" category in *IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2024–2025 Vendor Assessment* (IDC #US51741024, December 2024) qualified for inclusion in this assessment (except for Adobe, which only provides services on the Adobe platform).

Vendors had to have a geographic balance where no macroregion accounts for 75%+ of experience design and build revenue.

ADVICE FOR TECHNOLOGY BUYERS

IDC has the following advice for organizations looking to buy consulting and implementation services that build great experiences by turning design into on-the-ground reality:

- **Look for vendors willing to share risks and rewards with you.** Risk and reward sharing in services contracts are well established in CX services. Contracts do not need to be structured with all payments based on shared risks and shared rewards — not least as enterprises often fear overpaying if the vendor unexpectedly over-delivers on its contractual obligations. For the arrangement to be successful, both parties must be willing to share the risks as well as the rewards.
- **Look for vendors with both depth and breadth of services when planning complex projects.** Specialist boutiques with deep knowledge of a specific area can deliver real value, either alone or working with a larger and broader services provider. But depth by itself only goes so far — breadth often plays an important role too. For CX transformation projects requiring broad and end-to-end services, it's a good idea to test potential vendors to see if they can provide not just deep specialization in a particular product, technology, or aspect of CX but also that they can link these to your broader business and technology needs — for example, by ensuring that the technologies or process they implement work seamlessly with your legacy technologies, workflows, and business processes.
- **Look for CX services vendors that understand AI at both the technology and the business level and that are objective about its risks as well as its potential rewards.** AI will almost certainly revolutionize many aspects or customer experience, especially through the application of GenAI and of agentic AI. But this will likely be a long, multiyear journey in which many of the early promises made by these technologies will never materialize for many reasons including overenthusiasm about the potential of these technologies and underestimation of the effort required to implement them successfully. Look for vendors that are critical of not skeptical of the claims of AI technology makers and that have real-world experience of implementing leading-edge technology in the past.
- **Look for vendors willing to cannibalize FTE-based services by deploying AI technologies aggressively in service delivery.** GenAI and agentic AI deployment will likely have a major effect on CX services providers, reducing the need for many of today's ground-level tasks performed by employees near the bottom of the staffing "pyramid" — which often happens to be the most profitable part of the pyramid. Some services providers will try to ignore or downplay the potential of AI to automate service delivery, in order to put off the

time when they need to deal with this challenge. Look to work with the smarter CX services vendors that actively embrace AI in service delivery and cannibalize their traditional "FTE army"–based implementation services — if only because if they don't, someone else will. Expect them to share the financials benefits of deploying AI, which may mean lower prices in some cases, but don't expect them to slash prices across the board simply because they have used AI automation to reduce the human part of the delivery cycle.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Accenture

According to IDC analysis and buyer perception, Accenture is positioned as a Leader in the 2025 IDC MarketScape for worldwide experience build services.

Accenture has approximately 790,000 employees and operations serving clients in 120 countries. Clients include more than three-quarters of the Fortune Global 500.

Accenture has five global service lines: Strategy & Consulting, which helps clients transform their organizations; Song, which helps clients grow businesses by creating relevance for their customers; Technology, which provides IT consulting and implementation services that enable organizations to realize greater business value from technology; Operations, which provides managed services to help clients build intelligent new operating models; and Industry X, which helps clients reimagine their products and how they make them.

Personalization

Accenture's personalization strategy is built on a five-layered approach, including personalization strategy, CX enablement, data orchestration, people, and workflow and governance. Song's intelligence capability serves as the relevance engine for Song, housing its personalization capabilities that consists of two core services with six subservices designed to provide data and intelligence across all Song functions. Customer data strategy includes data strategy and monetization, personalization and experimentation, digital analytics, and data orchestration. Performance measurement and optimization includes audience analytics and insights and adaptive visualization and measurement.

Accenture's personalization tools and assets include Identity Graph (brand-powered first-party customer IDs), Intelligent Insights (behavioral science–led signals, advanced machine learning [ML] segmentation, genome enhancement, customer listening, and predictive patterns), Experience Cockpit (dashboards with customer performance indicators and insights for front- and back-office decision-making), Content Organization 3D (content preparation, dynamic asset management, metadata tagging, automated asset naming, and automated QA processes), and Dynamic Content Assembly (automated content versioning across multiple channels). GenAI tools include automated text generation, editorial content drafting, virtual assistant scripting, image/video creation, tagging, synthetic talent production, and innovative design layouts.

Data and Analytics

Song's data and AI practice is comprehensive. Its main areas are customer data architecture, data science, voice of the customer, CX measurement and analytics, experience optimization and personalization, measurement and attribution, and conversational AI. Offerings also include data migration and data platform modernization.

Accenture's data and analytics tools and assets include Relevance Engine (RE), an intelligence-first solution that converts complex, siloed data into actionable, unified insights. RE includes a Customer Data Architecture and range of Proprietary Assets including Identity Resolution, Audience Analyzer, and Attribution Platform. Another experience build asset is GrowthOS, a research and strategy tool that lets teams design, test, and validate differentiated customer experience.

Accenture's mission statement for experience build services is:

> At Accenture, we're committed to helping our clients achieve growth through relevance. We work at the intersection of people, business, and technology. We design and build life-enhancing products and services. We create meaningful connections for individuals — customers, employees, citizens, or the wider society — to foster sustainable growth. We work across every interaction — product, marketing, sales, and customer service — leveraging the power of technology and AI, combined with human ingenuity, robust data mastery, and intentional industry expertise.

Strengths

Accenture Song's design and marketing-focused capabilities are supported by scaled global specialist teams backed by broad and deep domain expertise in Accenture's consulting and IT services, including a strong set of supporting assets and tools. Accenture has strong personalization and data and analytics capabilities. It provides leading-edge implementation services and has strong organizational change capabilities. In conversations with Accenture reference clients for experience build services, three highly commended areas were its client understanding and insight, the quality of its professionals, and its ability to drive measurable business value through experience build services.

Challenges

Based on conversations with Accenture clients, two areas where the vendor has opportunity to improve its perception in the experience build space are in value for money and in vendor differentiation.

Consider Accenture When

Accenture is potentially a good choice for organizations that want a deep and extremely broad range of business and technology transformation capabilities combined with one of the larger benches of consulting and implementation talent available.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

The 24 vendors in this assessment represent, in IDC's view, the most important global providers of experience build services based on the breadth and depth of their experience build capabilities and their global reach.

However, the vendors in this assessment are not necessarily the only vendors worth considering for either global or regional business and technology change projects involving experience build. An organization should normally consider where it can use vendors not included in this assessment, dependent on the scope of its needs.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Experience build services are technology-enabled implementation services that help clients build products and services that provide a useful and/or enjoyable experience for their users. Specifically, an important goal must be that the consumer of these products or services has an optimized experience. In this context, "services" being built can include customer/user-facing events and channels such as marketing, sales, commerce, and customer service channels. In addition:

- Experience build services can include project services to build customer/citizen-facing applications, specifically persuasive content management applications and creative applications, as defined in IDC's Worldwide Software Taxonomy.
- Experience build services can include professional services to implement or improve packaged software platforms, such as Adobe Experience Cloud and Salesforce Experience Cloud. For example, it could include the following:
  - Customer service platform build services, which are IT project services to build customer service applications and contact center applications
  - Commerce platform build services, which are IT project services to build digital commerce applications

- Marketing and advertising platform build services, which are IT project services to build marketing campaign management applications and advertising applications
- Sales platform build services, which are IT project services to build sales force productivity and management applications

LEARN MORE

Related Research

- *What Today's Enterprises Want from the CX Services Industry of the Future* (IDC #US53644825, July 2025)
- *Worldwide and U.S. Customer Experience Services Forecast, 2025–2029* (IDC #US52469625, July 2025)
- *IDC Market Glance: CX Services, 2Q25* (IDC #US52469525, June 2025)
- *IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2024–2025 Vendor Assessment* (IDC #US51741024, December 2024)
- *Market Analysis Perspective: CX Services, 2024* (IDC #US51521424, September 2024)
- *IDC MarketScape: Worldwide Experience Build Services 2023–2024 Vendor Assessment* (IDC #US49988323, December 2023)

Synopsis

This IDC study represents a vendor assessment of the 2025 experience build services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC study covers a variety of vendors participating in the worldwide experience build services market, provides an assessment of leading experience build vendors, and discusses the criteria that are most important for companies to consider when selecting a vendor.

"With technological, social, political, and economic change showing no signs of letting up, customers and consumers have never been more demanding than they are now. Enterprises across the world must deliver on the promises they make to customers and consumers or face being replaced by competitors that better serve the people who ultimately make them their money," says Douglas Hayward, senior research director, Customer Experience Services and Strategies at IDC. "When choosing a CX services vendor to help them build great customer-facing products and services, enterprises should look for vendors with a broad range of CX-related capabilities, including AI expertise, strengths in data, analytics, and personalization technologies, and with strong supporting assets."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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