

IDC MarketScape: Worldwide Experience Design Services 2025 Vendor Assessment

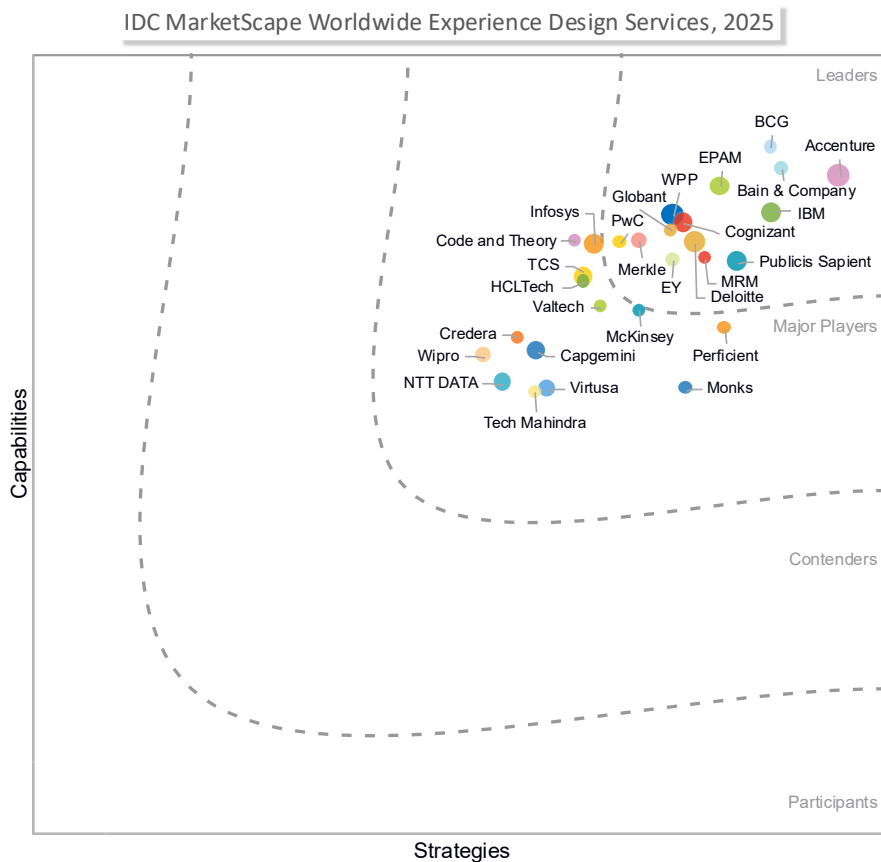
Douglas Hayward

THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Worldwide Experience Design Services Vendor Assessment



Source: IDC, 2025

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

IDC OPINION

This IDC study represents a vendor assessment of the 2025 experience design services market through the IDC MarketScape model. It is an update of *IDC MarketScape: Worldwide Experience Design Services 2023–2024 Vendor Assessment* (IDC #US49988123, 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 design market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing experience design services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of experience design 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:

- Feedback from calls with reference clients indicates that in the experience design 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.
- The second key findings from reference client calls was the vendors' *experience design excellence*, which also matches the findings from reference client calls in the 2023 assessment.
- The third highest area in terms of average reference client feedback in the experience design space was *pragmatic creativity*, a new question that 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 *vendor differentiation*, which matches the finding of the 2023 reference client calls. This is not surprising, as vendor differentiation is an area where most vendors tend to get lukewarm feedback. This was followed by consumer and customer insight and by customer experience (CX) thought leadership.

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

- Like reference clients, field survey respondents had people quality as the area of experience design where buyers were most impressed with vendors. As well as matching the findings of the 2025 reference client calls, this also matched the findings of the 2023 field survey.
- In the experience design space, people quality was followed in second place in the 2025 field survey by CX thought leadership, which matched the 2023 field survey findings.
- CX thought leadership was followed by industry-specific capabilities in third place in the 2025 field survey, which also matched the 2023 field survey findings.
- The experience design area where respondents in the worldwide field survey were least impressed with vendors was in vendor differentiation, which matches the findings of the 2025 reference client calls and which also matches the findings of the 2023 worldwide field survey. This was followed in the 2025 survey by value for money and by pragmatic creativity.

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

- Vendors in this assessment, on average, could be highly lauded in the experience design space for their *client-facing innovation networks*. Client-facing innovation centers play an important role in experience design. These are facilities where vendors can explore commercial opportunities and challenges involving experience design with clients and where they ideate and sometimes cocreate product or service prototypes for later development. Most experience design vendors have mature and extensive networks of innovation centers, most are able to demonstrate specialism and domain excellence in their centers, and most are able to point to examples of where clients have used their centers to create new business value.
- In second place was vendors' abilities, on average, in *leading-edge experience design* capabilities. The vendors in this assessment are among the largest in the world, and a great deal of their attraction lies in the range of services and the size of benches they can deploy. However, clients do not just want scale from their vendors, they also want vendors to be at the forefront of new technology and new techniques and concepts in experience design, even if they do not necessarily want to buy leading-edge services on every occasion. Many innovative experience design vendors worldwide have therefore invested in staying ahead of the curve to meet the demand of clients that want leading-edge services, through both organic capability development and acquisitions of smaller vendors with leading-edge capabilities. This investment is reflected in vendors' relative strength in this area of experience design.
- In third place was vendors' abilities, on average, in *digital offering design* capabilities. Digital offering design (formerly known as "service design") includes

the design of consumer-facing and customer-facing services (both online and in-person) and digital products including websites, apps, and online services. Digital offering design is a core capability in experience design, and to some extent, represents a "table stakes" capability on the part of experience design vendors. Given its central importance, it is no surprise that this is an area where on average, vendors are able to demonstrate strong capabilities and are able to show multiple examples of successful engagements with clients.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This assessment is part of a joint assessment during 2025 that produced two documents: *IDC MarketScope: Worldwide Experience Design Services 2025 Vendor Assessment* (IDC #US52973225, forthcoming) and *IDC MarketScope: 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. A seventh holding company, S4Capital (via Monks), is also represented in the experience design assessment.

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 design services that aim to create great experiences for consumers, customers, or citizens:

- **Look for vendors that can demonstrate a balance of creativity and commercially realistic pragmatism.** Experience design is an area where enterprise clients have traditionally valued creativity and innovation from their suppliers. They are right to do so, but with a caveat — innovation and creatively serve a higher purpose: driving profitable growth for the enterprise (higher

taxpayer or donor satisfaction for government bodies and nonprofits). While norm-challenging creativity can be positive, it must always be grounded in a desire to drive measurable value for the client, and it should always be backed by a realistic and evidence-based view of the operation and financial implications of what the designer is proposing.

- **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 overdelivers 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 processes they implement work seamlessly with your legacy technologies, workflows, and business processes.
- **Look for 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 of customer experience, especially through the application of GenAI and 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 full-time equivalents (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 this 2025 IDC MarketScape for worldwide experience design services.

Accenture is a massive services company, with 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, namely, Strategy and Consulting, which helps clients transform their organizations; Song, which helps clients achieve growth through relevancy to 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.

Digital Offering Design

Song offers digital offering design capabilities across three core areas. Product and service strategy services include product and service vision, proposition design, proof-of-concept (POC) creation, and brand creation and design. Product and experience creation services include experience design and build; adaptive experience system creation; system, data, and platform integration; and experience launch, go-to-market, and measurement and optimization services. Product capability build and scale services include digital factories, portfolio management, product and service growth, and value realization office services. Within Song, the Design and Digital Products practice takes a leading role in digital offering design.

Accenture's tools and assets for digital offering design include Silent Customer Sentiment Prediction, a proprietary AI that determines the NPS/CSAT for most individuals who do not respond to NPS/CSAT surveys; CX Root Cause and Key Driver Analytics, a tool that determines the many variables that influence positive/negative customer outcomes; and CX ROI, a way to determine the cost/value outcome for total CX improvements/individual initiative improvements.

Physical Design

Song has dedicated industrial and spatial design practices and design teams located in Germany, the Netherlands, Spain, China, and the United States. The teams carry out physical product design and work cross-industry but have the greatest expertise in the fields of automotive, consumer electronics, medical technology, and industrial equipment.

Accenture's tools and assets for product design include Simu-Pro, a tool and methodology to measure implicit brand and product perception, allowing for perception assessment and brand attribute definition. Design Style Observation (DSO) is a constantly updated set of categorized and perception-tested visual "corridors" that provide a starting point in client conversations and for design creation.

Innovation Network

Accenture has an extensive network of more than 165 innovation centers globally, including labs, studios, and hubs. Centers include:

- Design Studios are used by Accenture experience and design teams in 60+ physical studios globally. Design Studios are crafted for client innovation and cross-disciplinary innovation and facilities include Showrooms, Makeshops, and PlayLabs, where clients can see firsthand Accenture's most recent innovations.
- Gen AI Studios are designed to help clients move from interest in using GenAI to action to value in a responsible way with clear business cases. Gen AI Studios are located in Accenture Innovation Hubs around the world.
- Accenture Labs redefines the possible with applied R&D, incubating and prototyping new concepts that will have a near-term impact on clients' businesses and developing technology solutions to improve how businesses operate.

Accenture's mission statement for experience design states:

At Accenture, we are 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 experience design capabilities are supported by scaled global specialist teams backed by some of the broadest and deepest capabilities on the market in Accenture's consulting and IT services, including a strong network of innovation centers. Accenture has leading-edge experience design capabilities, strong capabilities in digital offering and product design, and strong organizational change capabilities. The company has won Red Dot awards for its design work. In conversations with Accenture's reference clients, the three areas where experience design services buyers commended the vendor highly were its ability to drive business value through experience design, the quality of its professionals, and its CX thought leadership.

Challenges

Based on conversations with Accenture's clients, two areas where the vendor has room to improve its perception in experience design are in value for money and vendor differentiation.

Consider Accenture When

Accenture is potentially a good choice for organizations that want a deep and extensive range of design, business, and technology transformation capabilities, combined with one of the largest benches of consulting talent available.

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 28 vendors in this assessment represent in IDC's view the most important global providers of experience design services, based on the breadth and depth of their experience design 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 design. An organization should normally consider where it can use vendors not included in this assessment, depending 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 design services help clients ideate, design or redesign, and test physical products, digital products, virtual services, and real-world services. Specifically, these design services aim to ensure that the consumer of these products or services has an optimal experience. This may mean ensuring that the experience that the poor consumers of a product or services has is useful or enjoyable or profitable, or a mixture of these. Further:

- Experience design can include customer journey design.
- Experience design can include customer segmentation, persona creation, customer targeting services, and offering-positioning services, where these are relevant to the creation or improvement of the experience associated with a product or service.
- Experience design can include the design (but not build) of sales channels, marketing channels, commerce channels, delivery channels, and customer care operations.
- Experience design can include the prototyping (but not the production or the management) of new services and digital or physical products.

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: Worldwide CX Services, 2024* (IDC #US51521424, September 2024)
- *IDC MarketScape: Worldwide Experience Design Services 2023–2024 Vendor Assessment* (IDC #US49988123, December 2023)

Synopsis

This IDC study represents a vendor assessment of the 2025 experience design 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 design services market, provides an assessment of leading experience design vendors, and discusses the criteria that are most important for companies to consider when selecting a vendor.

"Customer experience (CX) has never been more important to enterprises than it is today. But when great CX is delivered at scale, it hasn't happened by accident — it's been designed to be great," said Douglas Hayward, senior research director, Customer Experience Services and Strategies at IDC. "Enterprises should look for experience design consultancies that — among other things — balance creativity with commercially realistic pragmatism, have both depth and breadth of CX-related services, are willing to share risks and rewards with clients, understand AI at both the technology and the business levels, and are objective about its risks as well as its potential rewards."

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.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

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