IDC MarketScape

# IDC MarketScape: Worldwide Experience Design Services 2023–2024 Vendor Assessment
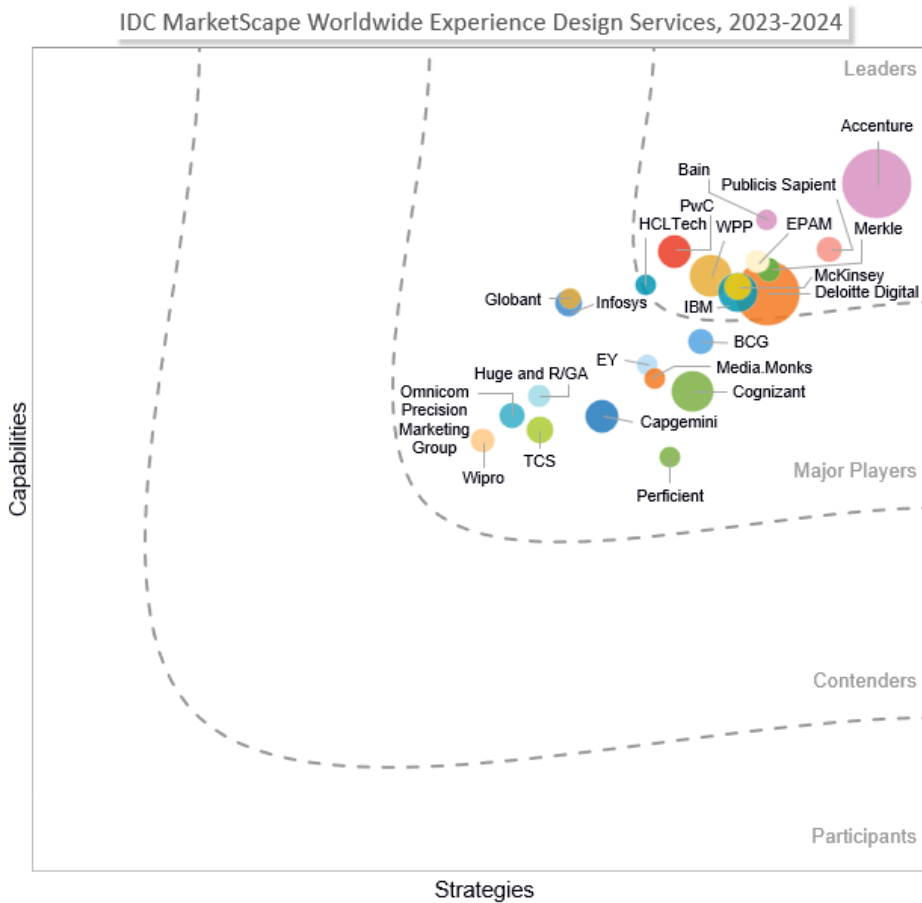
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**THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE**

## IDC MARKETSCAPE FIGURE

### FIGURE 1

**IDC MarketScape Worldwide Experience Design Services 2023-2024 Vendor Assessment**



Source: IDC, 2023

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

December 2023, IDC #US49988123e

## IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Experience Design Services 2023-2024 Vendor Assessment (Doc # US49988123). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

This IDC study represents a vendor assessment of the 2023–2024 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 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 the evaluation include:

- Feedback from calls with reference clients indicates that buyers are impressed most by the **quality of the professionals** that vendors deploy, followed by the excellence of vendors' experience **design skills**, and by the ability of vendors to **drive business value** for clients from the experiences they design.

- Feedback from the broader field survey of buyers of experience design services also had people quality as the area where buyers were most impressed with vendors. This was followed by CX thought leadership, industry-specific capabilities, and insight into consumers and customers.

- Where vendors performed least well in reference-client client feedback was in vendor differentiation, followed by customer experience (CX), thought leadership, and value for money. Interestingly, reference clients seemed less impressed with vendors' CX thought leadership than survey respondents. However, this does not necessarily indicate dissatisfaction with the actual thought leadership they were receiving. In conversation, they tended to criticize vendors for *not giving them enough* thought leadership or not providing thought leadership *proactively.* They rarely criticized the actual quality of the thought leadership that they received.

- Survey respondents agreed that differentiation was where vendors are least strong, followed by innovation and creativity, and vendors' ability to drive business value from experience design. Innovation and creativity were indeed some of the areas on reference calls where vendors tended to underperform, but notably, survey respondents were, on average, harsher on vendors when assessing the actual business value they get from experience design. This probably reflects the difference between the two groups – reference clients are almost by definition more likely to say that they get significant business value from their vendor's services,

- Regarding the areas assessed by IDC, rather than by vendors' clients, the vendors in this assessment, on average, were rated highest for their client-facing innovation networks and their **supporting assets and capabilities**, followed by their abilities in **leading-edge experience**

**design**. The first two are arguably generic "table stakes" capabilities. Still, they are important for providing experience design services that consistently combine innovation and design excellence with the ability to deliver industrial-strength scalability and resilience in the products and services being designed for clients.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This assessment is part of a joint assessment during the second half of 2023 that produced two documents: *IDC MarketScape: Worldwide Experience Design Services 2023-2024 Vendor Assessment* (IDC #US49988123, December 2023) and *IDC MarketScape: Worldwide Experience Build Services 2023-2024 Vendor Assessment* (IDC #US49988323, December 2023).

All four of the CX services' "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, PwC, and KPMG represent the "**Big Four**" multidisciplinary professional services firms (whereas KPMG is not assessed in this document).
- The "**digital agencies**" are CX services firms that come from a heritage of marketing or advertising. These are represented chiefly by the five largest worldwide "holding companies": dentsu, Interpublic, Omnicom, Publicis, and WPP.
- The "**global consulting and IT services firms**" are represented by Accenture, Capgemini, Cognizant, EPAM, Globant, HCL, IBM, Infosys, Perficient, TCS, 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, January 2023).

Within the category of global consulting and IT services firms, inclusion criteria for both assessments included the vendor being a top 10 provider of CX services by 2020 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.

In addition, vendors placed in the "Leaders" category in the *IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2022 Vendor Assessment* (IDC #US47542221, June 2022) qualified for inclusion in this assessment (except for Adobe, which only provides services on the Adobe platform). Similarly, vendors placed in the "Leaders" category in the *IDC MarketScape: Worldwide Customer Experience Improvement Services 2020 Vendor Assessment* (IDC #US45658220, September 2020) also qualified for inclusion in this assessment.

For all the archetypes, 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 a track record of all-round design excellence**. Experience design sits at the intersection of a number of disciplines, including (but not limited to) marketing, behavioral psychology, and technology consulting, as well as the actual traditional technical discipline of product and service design itself. A great experience design firm will understand the broad social context of a proposed new product or service, as well as the economic, social, demographic, psychological, and technological forces that the new offering will need to navigate if it is to be successful. Look for a vendor that can point to strengths and client success stories in all these aspects of experience design.

- **Look for vendors with consumer and customer insight, as well as design excellence**. When designing new products and services – and the experiences that these products and services bring to customers, consumers, and citizens – it is obviously important to have a partner with strong design skills and that understands the mechanics of marketing. Vendors should, for example, have a track record of creating customer journeys, personas, and so forth. But as well as having a strong capability in design as a discipline, a great experience design vendor will have a concrete and detailed understanding of the specific target audiences of their client. A great experience designer will understand the behaviors and motivations of the people their clients aim to serve – ideally better than the client itself. You do not want to be educating your experience design provider on your target customer or user – it should be the other way around.

- **Look for a vendor that understands your industry and can bring you thought leadership about where CX is heading**. Design excellence and understanding consumers and citizens are critical for experience design. It needs to be supplemented with an understanding of the dynamics of your industry because your organization doesn't exist in a competitive vacuum. For an experience to generate actual value for the organization (as well as for its customers, users, or citizens), it has to be designed with the industry dynamics in mind. Your experience designer must be able to say how exactly this new experience will benefit you and the people consuming the experience you are offering. That requires a deep understanding of the competitive context that your organization finds itself in. Ideally, your experience design partner will have a strong point of view (thought leadership, in other words) on how social, economic, and technological forces will change the competitive dynamics of your industry and how you can use these forces to design better experiences that generate value (and competitive advantage) for your organization.

- **Look for a vendor with a network of innovation centers and ask how they can help you imagine new products and services**. Look for a vendor with a global network of offices and spaces, such as "studios," demonstration labs, and immersion centers, where you can ideate and maybe prototype new concepts. While many of these ideas will go nowhere, some might become great new products and services. Ask to see and tour these centers and talk to reference clients using them to create new products and services. A great experience design vendor can take an idea you already have and turn it into reality, starting with your business challenges and getting you to imagine new opportunities that you might not have otherwise considered. That often requires your people to go offsite and to escape the confines of day-to-day work for a day or more – something that is usually best done in a purpose-designed facility of the sort that the best experience design vendors will have in every region of the world.

## 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 the criteria outlined in the Appendix, the description here summarizes each vendor's strengths and challenges.

### Accenture

According to IDC analysis and buyer perception, Accenture is positioned as a Leader in this 2023-2024 IDC MarketScape for Worldwide Experience Design Services.

Accenture is one of the world's largest services companies, with approximately 733,000 employees and operations in more than 200 cities in 49 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.

Accenture has expertise in more than 40 industries, including automotive, banking, capital markets, chemicals, communications/media, consumer goods, energy, food and beverage, freight and logistics, health, industrial equipment/manufacturing, insurance, life sciences/pharmaceuticals, natural resources/metals and mining, retail, software/technology, travel, utilities, and public service/government.

Key Accenture clients include Signet Jewelers, IHG Hotel & Resorts, Prada, Minna Bank, Tuvalu, Smart Car, and Colombia (for this research, IDC did not collect any feedback from these clients).

- **Service design**: Song has a dedicated experience practice distributed globally across 62 studios. Capabilities include building client design studios, design system creation, and management and design operations. Song offers experience design services across immersive experience, conversation, and space/retail and focuses on design research and human insights to identify market opportunities and business and service design for clients to capitalize on them. Brand transformation, UX content strategy, and product strategy help shape the story and define how value is measured.
    - Accenture's tools and assets for service design include Mindset Framework, a tool that replaces personas with behavioral or mindset-driven frames that are not mutually exclusive; Expressive Segmentation, a method that scales Mindset Frameworks; and Design from Within, an approach that helps clients build their own design capabilities.
- **Product design**: Song has a Song Connected Product and Spaces (CP&S) practice, with capabilities including physical product design, test-to-learn experience prototyping, packaging design, and experience definition.
    - Accenture's tools and assets for product design include smart connected product design and development (SCPDD), a framework to help clients design, launch, and enhance

intelligent connected products, and Master Toolkit Agile Firmware Engineering, a tool to accelerate the maturity of DevOps for Embedded.

Accenture has a number of key intellectual property assets that support its experience in design work, including:

- **AI Navigator for Enterprise,** a generative AI-based platform with industry and function-specific modules that help clients define business cases, make decisions, navigate AI journeys, choose architectures, and understand algorithms and models designed to accelerate responsible AI practices
- **myNav,** a platform to assess, design, and simulate cloud and infrastructure solutions
- **Transformation GPS,** a benchmark-based predictive and prescriptive change analytic
- **myDiagnostic,** a platform for assessing an organization's business and IT maturity
- **myConcerto,** an insight-driven platform to simplify and accelerate technology-led business transformation, and myIndustry, a cloud-based platform similar to myConcerto, to develop industry-specific solutions for industry verticals

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

- **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 Studios** focuses on the rapid development and prototyping of applications and the design and creation of digital services. Studios include Liquid Studios, Design Studios, and Operations Studios.
- **Accenture Innovation Centers** include Innovation Hubs. These demonstrate and scale industry and functional solutions based on emerging and advanced technologies. Key centers include the seven global Accenture Labs, such as Accenture's showcase Innovation Hub in Dublin, The Dock, and its Innovation Hub in Bengaluru, India. Each Lab is characterized by the R&D domains it focuses on and the industries it supports in terms of applied research and innovation.

Accenture Song says that its mission statement for experience design is: "Bold new creative solutions, delivered at a faster pace than ever before. These solutions will be the next great frontier for business growth, and they require a brand-new approach. One that widens a business' aperture and utilizes the full power of creativity, intelligence, technology, operations, industry, and ecosystem knowledge. We call this approach life centricity."

## *Strengths*

Accenture's design and marketing-focused capabilities are backed by some of the broadest and deepest capabilities on the market in consulting and IT services, including a strong network of innovation centers. Accenture has broad and deep capabilities in experience design through Accenture Song, including leading-edge experience design capabilities, and has strong capabilities in service design. Based on conversations with Accenture's clients, the three areas where, on average, clients commended Accenture most highly were design excellence, people quality, and vendor differentiation.

### Challenges

Based on conversations with Accenture clients, the vendor has the opportunity to improve its perception among experience design clients in innovation, creativity, and value for money.

### 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.

## 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 23 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, 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 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 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.

## LEARN MORE

## Related Research

- *Future of Customer Experience: How CX Services Providers Should Support CMOs with Generative AI* (IDC #US51262123, October 2023)
- *Market Analysis Perspective: Worldwide CX Services, 2023* (IDC #US49772123, September 2023)
- *Worldwide and U.S. Customer Experience Services Forecast, 2023-2027* (IDC #US49360722, July 2023)
- *IDC Market Glance: Customer Experience Services, 2Q23* (IDC #US49360923, June 2023)
- *IDC PlanScape: Future of Customer Experience – Implementing Customer Experience Suites Using a CX Services Partner* (IDC #US49971223, February 2023)
- *IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2022 Vendor Assessment* (IDC #US47542221, June 2022)

## Synopsis

This IDC study represents a vendor assessment of the 2023-2024 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 MarketScape covers a variety of vendors participating in the worldwide experience design services market.

This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing experience design in both the short term and the long term. A component of this evaluation is the inclusion of the perception that buyers of experience design services buyers have of both the key characteristics and the capabilities of the provider evaluated. Buyers were surveyed across all three of IDC's macroregions for the participating vendors, and IDC spoke to just under 60 reference clients of participating vendors.

"Customer experience is an important driver of business success for enterprises and a major spending priority for organizations in competitive environments. If the experience that a customer, user, or citizen has with a service or product is to be a good one, it must be well-designed. That means experience design is set to be an important driver of value for the enterprise, nonprofits, and public bodies of the next five years," says Douglas Hayward, research director, IDC's Customer Experience (CX) Services. "But organizations looking for a strategic partner in experience design should choose their vendor carefully, and they should look not just for technical design capabilities but also for an understanding of the social and technological forces that will set the context for customer experiences in the near future."

## 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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