

Magic Quadrant for Digital Experience Services

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By Brett Sparks, Sundar Viswanathan, [and 2 more](#)

Digital experience services providers use technology solutions to design, build and optimize digital experiences. In this Magic Quadrant, we evaluate 15 providers in the **digital experience services** market that compete to meet your organization's advisory, implementation and operational needs.

Market Definition/Description

Gartner defines digital experience (DX) services as those services that design, deliver and optimize digital experiences across customer, employee and citizen journeys using technology solutions. The services involve design, solution implementation, content management services, marketing services and ongoing operations. The digital experience solution is delivered through a combination of technologies and services working together to deliver the desired experience outcomes.

Digital experience services are focused on creating the optimal user experience, to better sell to, market to, inform and manage the target user (customer, partner, citizen or employee). The services include advisory on what the experience should be, implementation services to create the experience, and operational services to evolve and manage the ongoing experience. These services are not just technical services, but also include creative, content and marketing operations, historically served by digital marketing agencies but now offered by a range of providers, including consulting firms, systems integrators (SIs) and agencies.

Buyers of **digital experience services** will engage with service providers for one or more of the following use cases.

- **Experience design:** This use case supports the buying organization in defining their brand, product and service experience strategy, marketing strategy, content strategy, customer growth strategy, new product/service launch, technology strategy, and their information and service architectures.
- **Experience solution implementation:** This use case supports the client organization in implementing, migrating, composing, creating and developing digital experience solutions using a platform or a combination of products.
- **Experience solution operation and evolution:** This use case includes services that are focused on keeping the already-implemented experience solution current through technical evolution services, ongoing content and creative services, and marketing services.
- **Content and creative services:** This use case supports the creation and management of digital experiences for the purpose of collaboration, communication, commerce and marketing.
- **Marketing services:** This use case supports the digital marketing and advertising operations of client products and services.

Mandatory Features

The mandatory features for this market include:

- **Digital transformation consulting:** The provider's ability to understand the client's experience transformation needs and priorities, and to articulate their desired experience and business outcomes. Some of the core capabilities include expertise in: design; brand, product and services strategy; technology roadmap creation; and platform/product selection (if able to be technology-independent).
- **Technology platform implementation:** The provider's ability to compose a digital experience solution using best-of-breed platforms and products, and/or build integrations or custom solutions.
- **Experience evolution:** The provider's ability to deliver evolution and support services that not only keep the overall digital experience solution (technology and creative and marketing services) current, but also keep pace with changing business demand. In digital experience, the implementation never ends.

- **Content creation and management expertise:** The provider's ability to support clients with creation and management of digital content.
- **Marketing execution expertise:** The provider's ability to run marketing operations and execute marketing campaigns.

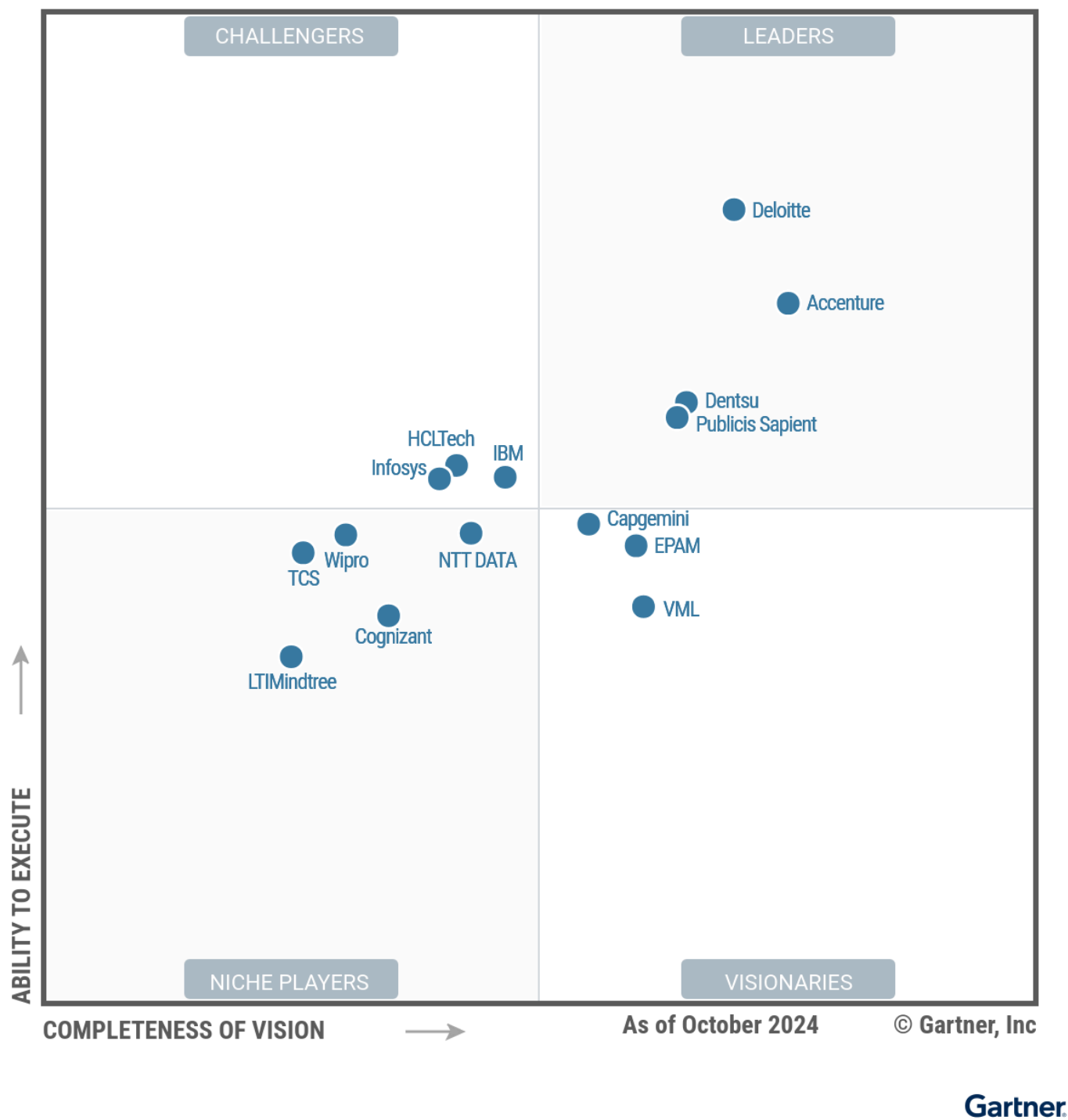
Common Features

The common features for this market include:

- **Ecosystem orchestration:** The service provider's ability to engage an ecosystem of software/platform vendors and other service providers. This enables the provider to prioritize their clients' use cases with software and platform vendors, drive co-investments and co-create solutions with other service providers.
- **AI & generative AI (GenAI) capabilities:** The provider's ability to embed AI technologies (including GenAI) as part of a digital experience service. For example, **digital experience services** could involve realizing AI capabilities offered by the platform, building AI-based extensions and customizations, or leveraging GenAI for content generation and campaign automation.
- **Business outcome commitment:** The service provider's ability to offer business-outcome-based engagement models. In such models, a percentage of the deal revenue is contingent upon achieving the client's business objectives.
- **Customer insight analytics:** The ability of the service provider to adopt a data-driven approach for advisory, design, creative and content, and digital marketing services.
- **Industry expertise:** The provider's ability to understand the client's business issues and operations specific to the client's industry, and to articulate desired business outcomes. An understanding of the client's particular industry is important in ensuring that the content and creative services, as well as the marketing services, are contextual and incorporate industry best practices.
- **Functional expertise:** The ability of the service provider to give advice and guidance related to the marketing, sales and digital commerce functions. It will require deep knowledge of digital experience practices across functional areas in a wide range of industries.

Magic Quadrant

Figure 1: Magic Quadrant for Digital Experience Services



Vendor Strengths and Cautions

Accenture

Accenture is a Leader in this Magic Quadrant. It is a full-service provider with an extra-large DX services practice. Accenture is headquartered in Dublin, Ireland. Gartner estimates that its DX services revenue grew by 14% from 2022 through December 2023. Of this revenue,

71% came from existing clients and 29% from new wins. Accenture's DX services revenue breakdown is 33% from EMEA, 49% from North America, 15% from APAC and 3% from LATAM. The top three platforms by number of full-time equivalents (FTEs) for Accenture are: Salesforce, Adobe and SAP. Its top three industries in this market are: other (this includes aerospace and defense; automotive and mobility; and high tech); manufacturing and natural resources; and banking and investment services.

Strengths

- **End-to-end DX services:** Accenture's execution of DX services, from design to implementation, exceeds many of its clients' expectations. Accenture has breadth and depth of offerings in the commerce, marketing technology (martech) and sales technology space. Its creative and marketing services range from technology managed services for CIOs and serving as the marketing or creative agency of record for CMOs, to designing and building new digital products and experiences, helping clients set up their own repeatable product design and build capabilities.
- **Specialized and local capabilities:** Accenture can serve clients in niche areas; for example, it has specialized marketing agency capabilities for the healthcare and life sciences industries through its acquisition of ConcentricLife. Accenture offers local, specialized capabilities for clients in Southeast Asia through recent acquisitions, such as Rabbit's Tale in Thailand.
- **Broad portfolio of client-deployable assets IP:** Accenture invests significantly in development of client-deployable intellectual property across its DX offerings. Its GrowthOS is used by large clients to set up growth and innovation hubs. Examples of its partner, industry and functional accelerators and solutions include DDEX (for Salesforce connectivity), Adobe-based dynamic content supply chain, and its own Relevance Engine for marketing.

Cautions

- **Occasional resource churn:** Accenture had several acquisitions over 2023, which added various skills and experience levels to its DX resource pool. As some clients reported frustrations with resource churn, prospective clients should aim to contract for an experienced team, locked-in key roles and strong governance to mitigate potential delivery issues.

- **Not suited for smaller clients:** Accenture has historically focused on serving large clients with transformative needs, and this same business model is true for the DX services space. Small and midsize business (SMB) clients that require one-off services will find it hard to negotiate outcomes at competitive prices.
- **Inconsistent knowledge transfer to ongoing support:** Some Accenture clients have experienced a gap between implementation and handoff services for the maintenance and growth of DX services, including continuous demand and requirements gathering from key stakeholders post go-live. Clients should contract for a detailed knowledge transfer and exit plan when deploying DX with Accenture.

Capgemini

Capgemini is a Visionary in this Magic Quadrant. It is a global business and technology provider with marketing and creative capabilities supported by a large DX services practice. Capgemini is headquartered in Paris, France. Gartner estimates that its DX services revenue grew by 2% from 2022 through December 2023. Of this revenue, 88% came from existing clients and 12% from new wins. Gartner estimates Capgemini's DX services revenue breakdown is 59% from EMEA, 32% from North America, 7% from APAC and 2% from LATAM. The top three platforms by number of FTEs for Capgemini are: Salesforce, Adobe and SAP. Its top three industries in this market are: banking and investment services; government; and manufacturing and natural resources.

Strengths

- **End-to-end transformation advisory capabilities:** Capgemini is reinventing its consulting proposition by bringing together acquisitions and its traditional business consulting capability. Acquisitions include frog, acquired through Altran in 2020, 23red, Fahrenheit 212, Possible Future, Adaptive Lab and Idean. Bringing these capabilities under one roof allows Capgemini to offer clients end-to-end transformation advisory services across business, brand, experience and technology.
- **Growing capability in marketing operations:** Capgemini's recent acquisition of BTC exemplifies its commitment to growing its marketing operations. It is industrializing this capability through its network of delivery centers, such as the media and creative operations hub that it designed for one retail client in the APAC and LATAM regions. This hub delivers end-to-end media planning, ad and creative operations for paid social and owned channels.

- **Offers innovative commercial models:** Capgemini has outcome-based and joint venture models with some of its clients. Especially in marketing services, where performance-linked commercial models are preferred, clients may find it easier to negotiate with Capgemini due to its high degree of maturity in handling complex arrangements.

Cautions

- **Inconsistencies in service orchestration:** Some reference clients indicated that Capgemini's ability to orchestrate solutions and align across geography and internal business units to meet desired outcomes needed improvement. Clients seeking to source end-to-end capabilities should clearly outline upfront, with Capgemini, how they will drive internal collaboration and action together.
- **Leadership communication challenges:** For complex DX projects or deployment of more advanced DX capabilities, some clients relayed a lack of leadership and communication of progress from Capgemini. Clients requiring guidance and frameworks for the ongoing use and value creation of advanced DX capabilities should lock in program leadership and design consultants and be open to co-creation workshops for an ideal solution.
- **Heavily focused on Europe:** Europe continues to be the most successful market for Capgemini, despite the Americas representing over one-third of its revenue. However, Capgemini's agency acquisition of BTC in 2023 is focused on bolstering its marketing services offering in Japan and globally. For now, clients outside of Europe should validate Capgemini's resourcing capabilities to limit project risks.

Cognizant

Cognizant is a Niche Player in this Magic Quadrant. It is a technology systems integrator with a midsize DX services practice. Cognizant is headquartered in Teaneck, New Jersey. Gartner estimates that its DX services revenue remained flat from 2022 to December 2023. Of this revenue, 94% came from existing clients and 6% from new wins. Cognizant's DX services revenue breakdown is 65% from North America, 20% from EMEA, 13% from APAC and 2% from LATAM. The top three platforms by number of FTEs for Cognizant are: Salesforce, Adobe and SAP. Its top three industries in this market are: healthcare and life sciences; banking and investment services; and communications, media and services.

Strengths

- **New DX practice:** Cognizant is restructuring its digital experience portfolio of services into Cognizant Moment, its new DX practice. This practice combines specific DX consulting, platform implementation, marketing and content services across commerce, martech and sales technology platforms. Cognizant Moment aims to improve visibility into the full stack offering and service engagement experience for its clients.
- **Strong implementation expertise:** Cognizant has fully integrated and scaled its key acquisitions since 2020. It has built strong capabilities and foundations for growth in Salesforce's Marketing and Sales Clouds and the Adobe Experience Manager platform. Clients in the martech and sales technology space can benefit from Cognizant's deep functional and implementation expertise and its industry and product knowledge.
- **Commitment to business outcomes:** Cognizant reported the highest percentage (relative to other vendors in this Magic Quadrant) of hybrid contracts with a risk-based approach. This was verified through client references, with many of them confirming that Cognizant consistently delivered on expected business outcomes. Clients interested in a hybrid DX delivery approach with shared risk should take advantage of Cognizant's flexible contracting models.

Cautions

- **Limited brand strategy and advisory expertise:** While Cognizant has acquired software product design and transformation capabilities, its brand strategy and advisory expertise is currently limited. Clients requiring agency-level expertise in the brand strategy and marketing space should specifically evaluate Cognizant's ability to meet their business needs in that area.
- **Geography constraints in LATAM and APAC:** Cognizant has limited delivery and implementation capabilities to service the LATAM, Middle East, Africa and APAC (specifically Southeast Asia) markets, especially in content, creative and marketing services. Potential clients should evaluate Cognizant's ability to provide regional expertise and/or demonstrate understanding of customers in these markets.
- **DX competencies favor key industries:** Cognizant's DX capabilities are heavily reliant on credentials from work delivered in few industry verticals. For instance, its creative and content services are heavily based on the projects it delivers in the healthcare, life sciences, media, communication, technology, and banking and financial services industry

verticals. Prospective clients should request references and evaluate if the capabilities fit their vertical context beyond those cited.

Deloitte

Deloitte is a Leader in this Magic Quadrant. It is a full-service provider with an extra-large DX services practice, led by the Deloitte Digital business. Deloitte is a globally coordinated member-firm organization spanning many countries and regions. Gartner estimates that its DX services revenue grew by an estimated 16% from 2022 through December 2023. Of this revenue, 90% came from existing clients and 10% from new logos. Deloitte's DX services revenue breakdown in rank order is North America, EMEA, APAC and LATAM. The top three platforms by number of FTEs for Deloitte are: Salesforce, Adobe and SAP. Its top three industries in this market are: government; healthcare and life sciences; and communications, media and entertainment.

Strengths

- **Creative agency approach to digital design:** Deloitte helps clients build their brands through programs that include strategists, digital designers, creatives and technologists. Deloitte Digital is a key differentiator in its DX offerings, able to provide deep expertise across many industries. With a \$2 billion investment in IndustryAdvantage, Deloitte has helped clients drive their digital transformation initiatives across a wide breadth of industries to create unique business value.
- **Comprehensive end-to-end DX capabilities:** Deloitte offers a comprehensive range of DX services that cater to clients across various industries and regions worldwide. Its digital business services operation covers 120 countries and has a physical presence in over 60 countries. This aligns with Deloitte's goal to serve its global clients as "One Deloitte," regardless of location. Deloitte also serves major regional and local accounts across various industries and verticals while adhering to global and regional policies.
- **Seamless transformational delivery:** Deloitte collaborates with a wide network of solutions and alliance partners like Adobe, Amazon Web Services (AWS), NVIDIA and Salesforce to deliver integrated services aligned with longer-term solution roadmaps. For complex enterprisewide efforts, its transformation delivery offerings are developed and co-created with clients to produce innovative solutions.

Cautions

- **Not a good fit for isolated DX projects:** Deloitte's strategic focus is to deliver end-to-end customer experience and long-term relationships across all domains; however, it may not be suited for clients looking for point solution implementations or for pure-play outsourcing of their DX products.
- **Expectation setting during planning:** DX services initiatives are often complex, requiring deep preparation that involves process taxonomies and data disciplines between systems. Some clients expressed frustration that Deloitte could have given them more insight into team expectations and existing environments prior to kicking off their programs.
- **Premium pricing:** Deloitte's prices reflect its position as a premium service provider, typically engaging in cross-global and midmarket digital transformation projects. While Deloitte offers a variety of commercial construct options, clients with tactical projects in mind may find the offering price tag challenging.

Dentsu

Dentsu is a Leader in this Magic Quadrant. It is an agency provider with a large DX services practice. Dentsu is headquartered in Tokyo, Japan. Gartner estimates that its DX services revenue grew by 1% from 2022 through December 2023. Of this revenue, 66% came from existing clients and 34% from new wins. Dentsu's DX services revenue breakdown is 41% from North America, 31% from APAC, 27% from EMEA and 1% from LATAM. The top three platforms by number of FTEs for Dentsu are: Salesforce, Adobe and Oracle. Its top three industries in this market are: communications, media and entertainment; manufacturing and natural resources; and retail.

Strengths

- **Comprehensive DX services offerings:** Dentsu has a deep understanding of the DX services market and a strong portfolio of agency and technology organizations. Fifty-five percent of Dentsu's deals come through business buyers like CMOs, which validates Dentsu's market positioning as an agency-based DX transformation partner.
- **Thought leader in delivering business outcomes:** Dentsu has established a business value architecture group that models client investments and expected outcomes, allowing it to offer variable revenue and outcome-based commercial models in about 35% of its engagements. Examples of KPIs include return on ad spend (ROAS), customer conversion and growth rates, accuracy, placement, and click-through rates.

- **Expansive portfolio of proprietary DX tools:** Dentsu is making significant investments in building and strengthening its products portfolio. It has expanded its customer insights and analytics platform (Merkury) and has developed accelerators and connectors for leading partner platforms. These investments in internal R&D and partner solutions can drive innovation and positively impact delivery efficiencies in client engagements.

Cautions

- **Fledgling operating model:** One Dentsu operating model that is aimed at breaking down the siloed internal business units and developing a unified go-to-market proposition is less than two years old. Dentsu Global Services, which underpins the company's delivery industrialization, is three years old. Reference clients do not rate Dentsu's operational efficiency as highly as other capabilities. Clients evaluating Dentsu as a partner should seek evidence of its ability to deliver cost and scale efficiencies.
- **Not ideal for pure-play global technology implementations:** Dentsu may not be suited for clients that need a large-scale, pure-play platform or product implementation services. Dentsu is still scaling its platform implementation capacity outside of Japan, North America and EMEA, and has a smaller technology delivery practice when compared with other vendors in this research.
- **Acquisitions may affect service delivery:** Dentsu has been powering its growth and filling capability gaps through acquisitions, demonstrated by three recent acquisitions that are in varying stages of integration. This might pose delivery challenges if the client's projects coincide with the integration phase. Potential customers should specifically check the source of capability for a given engagement.

EPAM

EPAM is a Visionary in this Magic Quadrant. It is a technology provider with agency capabilities and a medium-sized DX services practice. EPAM is headquartered in Newtown, Pennsylvania. Gartner estimates that its DX services revenue declined by 3% from 2022 through December 2023. Of this DX services revenue, 90% came from existing clients and 10% from new wins. EPAM's DX services revenue breakdown is 60% from North America, 38% from EMEA and 2% from APAC. The top three platforms by number of FTEs for EPAM are: Salesforce, SAP and Adobe. Its top three industries in this market are: communications, media and entertainment; retail; and banking and investment services.

Strengths

- **Growing agency capability:** EPAM is deliberately expanding its agency capability through acquisitions and organic growth. It has acquired seven existing agencies and integrated them under their own agency umbrella within EPAM. The company has been expanding its marketing, content and creative services capabilities since 2012. Although these capabilities have not been widely publicized, EPAM has nearly 500 FTEs in these functions.
- **Good UI development engineering skills:** With a heritage in custom software development, EPAM's resources are skilled in building experience solutions and lead those engagements with what clients report as excellent experience design. EPAM indicates that 20% of its overall staff is engaged in DX services. Over 1,000 FTEs are involved in experience design, complementing nearly 10,000 delivering platform implementation and evolution services.
- **AI-driven transformation for DX services:** EPAM is working with AI solutions from both core cloud platforms and emerging leaders in AI DX services, such as Jasper. With Humanique as one example of its AI-powered, solution-enhancing customer insights, EPAM is a good fit for organizations embracing advanced technologies to understand customer behavior. EPAM rates in the top three vendors in this evaluation for its use of AI and GenAI, as well as for its digital transformation consulting services.

Cautions

- **Scale of creative and marketing expertise:** Although EPAM is currently growing its agency capabilities, the overall scale of creative and marketing is low compared with the established agencies, consultancies and systems integrators in this research. Multinational organizations seeking large global campaigns should validate that EPAM can staff them effectively.
- **Reliance on Central and Eastern European resources:** Since the Russian invasion of Ukraine, EPAM has diversified and expanded its geographic footprint. However, almost half of its FTEs delivering DX services are still located in Eastern Europe. Organizations using these services must carefully monitor the geopolitical risks in the region when engaging EPAM for large engagements with a high proportion of out-of-country resources.
- **Not ideal for projects with cost constraints:** Some reference clients noted that EPAM is less focused on financial feasibility and budget in favor of innovations in user experience

or best-in-class solutions. Clients under cost constraints should construct or utilize contracts with strict cost controls.

HCLTech

HCLTech is a Challenger in this Magic Quadrant. It is a technology provider with a large DX services practice. HCLTech is headquartered in Noida, India. Gartner estimates that its DX services revenue grew by 11% from 2022 through December 2023. Of this revenue, 89% came from existing clients and 11% from new wins. HCLTech's DX services revenue breakdown is 55% from North America, 33% from EMEA, 11% from APAC and 1% from LATAM. The top three platforms by number of FTEs for HCLTech are: SAP, Salesforce and Oracle. Its top three industries in this market are: manufacturing and natural resources; banking and investment services; and healthcare and life sciences.

Strengths

- **Technology focused:** HCLTech is focused on technology consulting, leveraging its engineering expertise to address enterprise digital transformations, including experiences. HCLTech's approach enables it to deliver at scale and transform customer operations throughout the process. HCLTech has dedicated GenAI labs with its solution partners, as well as its internal Value Creation Portal, which encourages employee-driven innovation from 28,000 FTEs.
- **Product-aligned operating model:** HCLTech's product-aligned operating model provides a framework to align IT delivery focused on business outcomes. Its modern and agile deployment approach incorporates insights from its digital experience engagements with clients as key data points for future engagements.
- **Robust ecosystem capabilities:** HCLTech has long-standing partnerships with major technology, communications and cloud providers (for example, Adobe, Oracle, Pega, Salesforce and Verizon), which enables end-to-end design and delivery for multiexperience. This is facilitated by HCLTech's iCX Intelligent Document Processing to harness GenAI, cognitive platforms and cloud-native PaaS capabilities.

Cautions

- **Relatively low ratio of creative and marketing services:** HCLTech has long focused on the strength of its technology and implementation resources, maintaining proportionally smaller creative and marketing operations teams in comparison to Leaders in this cohort.

Clients with in-house creative functions may find HCLTech to be a good fit, as well as those clients choosing to utilize one of HCLTech's creative partners or contracting separately for creative deliverables.

- **Resource churn:** While HCLTech's attrition rate is similar to or less than its full-service competitors in this research, some clients reported DX services impacts from key resources leaving or being reassigned. Other clients relayed limited senior leadership involvement and oversight reviews with HCLTech, which they felt could have improved overall services received.
- **Regional resource constraints:** Two-thirds of HCLTech's delivery FTEs reside in the APAC region. Clients engaging HCLTech should determine where work will be done and ensure it aligns with expectations and relevant skills, especially when time overlap and frequent collaboration is of utmost importance.

IBM

IBM is a Challenger in this Magic Quadrant. It is a technology provider with a large DX services practice. IBM is headquartered in Armonk, New York. Gartner estimates that its DX services revenue grew by 2% from 2022 through December 2023. Of this revenue, 90% came from existing clients and 10% from new wins. IBM's DX services revenue breakdown is 44% from North America, 33% from EMEA, 13% from APAC and 10% from LATAM. The top three platforms by number of FTEs for IBM are: SAP, Salesforce and Adobe. Its top three industries in this market are: banking and investment services; manufacturing and natural resources; and retail.

Strengths

- **Strong partner ecosystem:** IBM has invested in building a wide network of partnerships that includes Adobe, Salesforce and SAP. By embedding watsonx capabilities and making the IBM Granite model series available on partner products and platforms, the company offers clients more choice in their AI use cases. In addition to shoring up its partners' AI capabilities, IBM is developing consulting services to advance client adoption of partner products, like Adobe Express. Such initiatives improve delivery assurance for clients on partner platforms.
- **Agency and asset-led approach:** IBM iX is the experience agency within IBM Consulting that clients can leverage for their brand and experience strategy advisory needs. Using an asset-based model through frameworks and accelerators like IBM Garage, IBM Consulting

Advantage and IBM iX Experience Orchestrator, the company brings step change productivity improvement and accelerated time to market in its delivery of client services.

- **Deep domain expertise:** IBM has developed industry-leading domain expertise through investment and its strategic engagement with clients. Its ability to innovate at scale — in particular, in industry segments — is evidenced by client references and public case studies (for example, fans' experience of major sporting events like the U.S. Open, Wimbledon and The Masters). Furthermore, IBM has made industry a core part of its career framework, with a specific requirement for industry skills development.

Cautions

- **Limited marketing agency capabilities:** Although IBM provides marketing agency services across strategy, design, content creation, martech implementation and marketing operations (including marketing campaigns), it does not provide above-the-line advertising campaigns, media planning and buying services, public relations, SEO, and trade marketing. IBM relies on third parties for agency work, so potential clients requiring marketing agency expertise should specifically evaluate IBM's offerings to ensure clear requirements are communicated throughout the engagement.
- **Premium pricing:** Based on Gartner inquiry, some clients have reported premium pricing for IBM DX implementation services, causing them to remove organizational change management (OCM) or other success drivers from their project budget. Clients should prepare for negotiations by adopting nuanced delivery models and leveraging IBM assets and accelerators where possible to eliminate redundancies and inefficiencies, and help control costs.
- **Focus on large and midsize enterprises:** IBM targets large and midsize enterprises that are most likely to benefit from its asset-driven operating models and drive partnership value. Clients with smaller, solitary projects may find a more suitable niche or midtier provider for specialized or one-off initiatives.

Infosys

Infosys is a Challenger in this Magic Quadrant. It is a technology provider with marketing and creative capabilities, and it has a very large DX services practice. Infosys is headquartered in Bengaluru, India. Gartner estimates that its DX services revenue grew by 3% from 2022 through December 2023. Of this revenue, 73% came from existing clients and 27% from new wins. Infosys' DX services revenue breakdown is 65% from North America, 19% from EMEA,

12% from APAC and 4% from LATAM. The top three platforms by number of FTEs for Infosys are: Adobe, Salesforce and SAP. Its top three industries in this market are: communications, media and entertainment; banking and investment services; and retail.

Strengths

- **CMO-aligned suite of offerings:** Infosys has invested in developing Infosys Aster, a set of AI-amplified marketing services, solutions and platforms. While many vendors in this research have recently invested in AI capabilities and collated best practice artifacts into enterprisewide branded methodologies and tools, Infosys is one of the few that has an aligned set of tools aimed at CMOs.
- **Growing agency capabilities through acquisitions:** Infosys is growing its creative and marketing capabilities through acquisitions such as oddity (now WongDoody), Blue Acorn iCi, Simplus and Fluido. These acquisitions complement its strong technical platform delivery with design capabilities.
- **BPM services for marketing operations:** Infosys' marketing operations service is delivered via Infosys BPM, providing good marketing operations and customer management services at a transactional level for back-office transactions.

Cautions

- **Limited DX knowledge:** Infosys categorizes all of its technical projects under "digital experience engagements" whenever the project involves UI changes. This limited understanding hinders its ability to deliver the same level of experience as Leaders in this Magic Quadrant. Prospective clients should have measurable objectives contracted with clear digital experience deliverables if considering Infosys.
- **Inconsistent or siloed delivery:** Infosys is building agency capability through acquisitions; however, these acquisitions need to be fully integrated into the overall delivery to avoid a fragmented approach and inconsistent client experience. Of Infosys' 260,000 FTEs, 1,000 dedicated to creative and marketing DX services remain within the acquired agency (WongDoody) and thus sit outside the company's traditional delivery model.
- **Limited proactivity in proposing solutions:** While clients have praised Infosys for technical expertise, some have also noted in surveys and inquiries that they would like the company to be more proactive in bringing solutions to their business problems. Some clients found that Infosys lacked initiative to recommend solutions and execute agreed plans to address the business challenge.

LTIMindtree

LTIMindtree is a Niche Player in this Magic Quadrant. It is a technology provider with a large DX services practice. LTIMindtree is headquartered in Mumbai, India. Gartner estimates that its DX services revenue grew by 7% from 2022 through December 2023. Of this revenue, 92% came from existing clients and 8% from new wins. LTIMindtree's DX services revenue breakdown is 72% from North America, 23% from EMEA, 4% from APAC and 1% from LATAM. The top three platforms by number of FTEs for LTIMindtree are: Salesforce, Adobe and Oracle. Its top three industries in this market are: retail; banking and investment services; and insurance.

Strengths

- **Ideal for clients with clear DX vision:** Almost two-thirds of LTIMindtree's DX resources are allocated to implementing DX platforms. The company's "power of partnership" model and technical advisory and design skills make it a good fit for clients that know their own processes and have a detailed target state in mind, seeking a provider that can build the right platform to scale regardless of technology.
- **Focused on DX technology design:** Compared with other providers in this research, LTIMindtree has a slightly above-average percentage of DX resources dedicated to its DX product from the initial design perspective. The company's product and platform knowledge across DX capabilities in experience engineering and martech matches up well with its traditional offerings in major ERP and CRM delivery and support.
- **Product alignment with market trends:** LTIMindtree's understanding of the DX services market is strong across major industries. It continues to invest in experience sites like Aurora and The Digital Pumpkin. It is also exploring and enabling client-expected experiences, from websites and portals to human-machine interfaces and augmented, virtual and mixed reality.

Cautions

- **Limited geographic coverage:** LTIMindtree has 70% of its resource presence in APAC, though 95% of its services are focused in North America and Europe. While LTIMindtree has an estimated 30% onshore delivery footprint and is actively expanding in LATAM, Poland, Italy and South Africa, clients requiring colocated or "same time zone" resources

for intense collaboration should secure key roles in desired regions when engaging with this vendor.

- **Emerging agency ad and media practice:** LTIMindtree acknowledges the need to develop and acquire capabilities in creative, ad and media management. It has a relatively low percentage of creative resources among vendors in this research, so clients should either have a strong internal capability, ensure LTIMindtree utilizes one of its creative partners to complement their experience design capability, or contract separately for creative, ad and media deliverables.
- **Evolving innovation and advanced tech investment:** While LTIMindtree has made investments in AI/GenAI-based experience centers in the U.S., the U.K. and India, its investment in advanced technologies — which can be essential to the provision of DX services — is comparatively low. Clients seeking immediate access to innovation labs in this area should confirm with LTIMindtree that the necessary capabilities are actively available for their use.

NTT DATA

NTT DATA is a Niche Player in this Magic Quadrant. It is a technology provider with a large DX services practice. NTT DATA is headquartered in Tokyo, Japan. Gartner estimates that its DX services revenue grew by 10% from 2022 through December 2023. Of this revenue, 80% came from existing clients and 20% from new wins. NTT DATA's DX services revenue breakdown is 38% from North America, 31% from EMEA, 18% from APAC and 13% from LATAM. The top three platforms by number of FTEs for NTT DATA are: Salesforce, SAP and Adobe. Its top three industries in this market are: manufacturing and natural resources; communications, media and entertainment; and banking and investment services.

Strengths

- **Breadth of technology orchestration:** NTT DATA is focused on technology consulting, with engineering expertise to address customer expectations for digital transformations through technology and innovation. With Syntphony, its technology asset platform, NTT DATA is able to deliver rapid, composable DX solutions at scale and to transform customer operations throughout the process.
- **Service-centric industries focus:** While NTT DATA serves most industry verticals, its experience with public sector, utilities, and banking, financial services and insurance (BFSI) clients is broader than most of the cohort in this research. NTT DATA tools like

Syntphony Employee Intranet are effective for improving digital workplace experience and knowledge sharing, which are key in service-oriented organizations.

- **Appeals to midsize to large organizations:** NTT DATA focuses on large, end-to-end partnerships with clients — from build to run. Of NTT DATA's DX implementation projects, 44% were for clients with over 10,000 employees, and a further 22% for clients with over 2,500 employees. This indicates that NTT DATA is a good fit for midsize to large businesses.

Cautions

- **Client DX maturity required:** For clients just starting their digital transformation journey and unsure about their goals, NTT DATA might not be the ideal partner for a shared risk and reward relationship. It is important for clients to have clear expectations and be open to some level of risk in their initial DX investments. Clarifying these objectives beforehand will help ensure a successful partnership with NTT DATA.
- **Not ideal for one-off DX projects:** Although NTT DATA has end-to-end customer experience across all domains, it is not suited for point solutions or pure-play outsourcing of DX environments. Clients looking for a provider with experience in these areas may not find NTT DATA a good fit.
- **Lower ratio of creative and marketing resources:** NTT DATA has a smaller proportion of creative, advertising and campaign resources compared with technical execution, delivery and operations in the DX services market. Clients should have a strong internal creative team with associated experience assets prior to engaging NTT DATA.

Publicis Sapient

Publicis Sapient is a Leader in this Magic Quadrant. It is a full-service provider with a large DX services practice. Publicis Sapient is headquartered in Boston, Massachusetts. Gartner estimates that its DX services revenue grew by 6% from 2022 through December 2023. Of this revenue, 80% came from existing clients and 20% from new wins. Publicis Sapient's DX services revenue breakdown is 49% from North America, 39% from EMEA, 8% from LATAM and 4% from APAC. The top three platforms by number of FTEs for Publicis Sapient are: Salesforce, Adobe and Oracle. Its top three industries in this market are: financial services, retail and travel.

Strengths

- **Large-scale industry experience:** Publicis Sapient's industry dexterity allows it to cover clients from the highly dynamic retail and media sectors, to those in the more regimented government and public sectors. It has delivered projects at scale, including typically signing deals in the \$1 million to \$5 million range. Publicis Sapient has approximately 22,500 DX professionals who provide a solid DX foundation. As the digital business transformation hub of the Publicis Groupe network, Publicis Sapient can tap into its "Power of One" relationship for additional experience in marketing and media.
- **End-to-end, experience-led delivery:** Publicis Sapient utilizes its integrated SPEED (strategy, product, experience, engineering, and data & AI) capabilities — along with key resources within Publicis Groupe's ecosystem — to quickly create multidisciplinary teams for specific client engagements. Its commitment to end-to-end delivery is demonstrated through flexible contracting and outcome-based relationships.
- **Enables DX transformation:** Publicis Sapient's 2023 acquisitions of Corra, Tquila ANZ and Yieldify (with Publicis Groupe), combined with its core offerings in DX, help it drive and support client transformations of platform, digital presence and scale. Publicis Sapient helps clients establish their own experience management office (XMO) with the ability to scale.

Cautions

- **Less focus on pure implementation deals:** Publicis Sapient dedicates a lower percentage of resources to solution implementation and ongoing operations of DX services, relative to other vendors in this research. Some clients relayed via survey that transitioning from design and delivery to operational support was cost prohibitive, which could be due to the vendor's higher allocation of resources in creative and marketing versus care and feeding of DX solutions.
- **Limited APAC and Africa reach:** Publicis Sapient's limited geographic reach may prevent it from effectively fielding a team for clients in the APAC and Africa regions. Potential clients in these regions seeking on-site expertise or same-time-zone collaboration may find Publicis Sapient unsuitable for their needs.
- **Not ideal for one-off or execute-only projects:** Publicis Sapient targets clients undergoing or embracing significant change, as well as those that have executive buy-in and are flexible and open to innovative change. Clients looking for plug-in installations, highly

prescriptive delivery initiatives and strict managed services are not well-suited for this vendor.

TCS

Tata Consultancy Services (TCS) is a Niche Player in this Magic Quadrant. It is a full-service provider with a large DX services practice. TCS is headquartered in Mumbai, India. Gartner estimates that its DX services revenue grew by 5% from 2022 through December 2023. Of this revenue, 96% came from existing clients and 4% from new wins. Gartner estimates TCS' DX services revenue breakdown is 63% from North America, 17% from EMEA, 17% from APAC and 3% from LATAM. The top three platforms by number of FTEs for TCS are: Adobe, Salesforce and Oracle. Its top three industries in this market are: banking and investment services; communications, media and entertainment; and transportation.

Strengths

- **Strong B2B and indirect customer offering:** TCS is effective in connecting organizations to support complex B2B, B2B2B and direct to business (D2B) transactions and experiences by using forums like its Co-Innovation Network (COIN). TCS has created suites of industry-specific solutions and capabilities to support its experience-first framework and drive client objectives like omnichannel go-to-market strategies.
- **Extensive technical delivery capabilities:** With 20,000 FTEs, 155 delivery centers and 38 innovation labs and studios, TCS' global scale and breadth of in-house technical capability for DX services is strong. GenAI is also a focus area for TCS when building DX-supporting platforms across industry sectors and enterprise applications.
- **Strong solution partner ecosystem:** TCS maintains strong strategic partnerships with notable solution market providers like Adobe, Oracle, Salesforce and SAP, along with hyperscalers like Microsoft Azure, Google Cloud Platform and AWS across most DX services capabilities. TCS is a good fit for clients requiring technical orchestration or consolidation of multiple systems or tools.

Cautions

- **Lagging in agency capabilities:** TCS' content creation and experience evolution are not as strong as Leaders in this Magic Quadrant. Clients in dynamic markets that have internal teams or third parties providing creative content services should retain those resources in their DX planning. While TCS has capable technical and execution services, it may not be

the ideal partner for clients requiring deep customer experience journeys and ongoing creative innovation.

- **Lower creative and marketing skills ratio:** TCS has a smaller proportion of creative, advertising and campaign resources compared with technical execution, delivery and operations in the DX services market. Clients should have a strong internal creative team with associated experience assets prior to engaging TCS. Otherwise, they may struggle with TCS in the first stage of developing customer journeys.
- **Inconsistency in meeting business expectations:** TCS' delivery model falls short of meeting client DX services expectations in content services, business consulting and success of regression testing for iterative deployments. Clients working with TCS should ensure continued business engagement from stakeholders throughout the project and lock in key TCS process and architect resources.

VML

VML is a Visionary in this Magic Quadrant. It is a technology provider with a large DX services practice. VML's principal offices are in Kansas City, New York City and London. Gartner estimates that its DX services revenue grew by 3% from 2022 through December 2023. Of this revenue, 70% came from existing clients and 30% from new wins. VML's DX services revenue breakdown is 43% from EMEA, 28% from North America, 18% from APAC and 11% from LATAM. The top three platforms by number of FTEs for VML are: Adobe, Salesforce and Sitecore. Its top three industries in this market are: manufacturing and natural resources; healthcare and life sciences; and retail.

Strengths

- **Solid marketing understanding:** VML's agency heritage makes it a strong creative overall solution development partner for DX initiatives. VML has found a way to marry trusted creative skills with growing technical capabilities beyond what vendors in the Niche Player quadrant have displayed.
- **Full range of end-to-end digital growth services and delivery:** Through its alliance partners — MACH Alliance, VTEX, Optimizely and Braze — with concerted outbound prospecting, VML has built capabilities to both sell and deliver **digital experience services**. Using its agile journey-driven development, VML is a good fit for organizations that have big growth ambitions but are highly risk averse and may need to realign business KPIs to demonstrate safe yet feasible roadmaps.

- **Strong Shopify and SAP expertise:** VML has global reach in terms of resources and capabilities. It has the highest percentage of certifications in Shopify of all providers in this research and the third highest percentage in SAP. This enables VML to provide deep technical expertise to its clients using these platforms.

Cautions

- **Limited DX technology and IP base:** VML has one of the lower percentages of resource expertise in technology orchestration, ongoing evolution and operational support coverage, relative to other vendors in this research. For both talent acquisition and deepening IP, VML recognizes these are growth opportunities for complex DX initiatives requiring a careful mix of creativity and technology.
- **Single technology focus:** VML has more FTEs dedicated to Adobe than the total number of FTEs allocated to all other technologies combined. Potential clients seeking expertise in other technologies at a large scale should ensure VML can effectively provide the necessary resources for an optimal solution.
- **Defaults to T&M cost models:** With 60% of its DX services contracts being time and materials (T&M), VML seems less inclined to offer outcome-based proposals compared with other vendors in research. Clients with clear milestones, objectives and expected outcomes for which they need to contract may require additional effort to construct a feasible and mutually agreeable contract.

Wipro

Wipro is a Niche Player in this Magic Quadrant. It is a technology provider with growing agency capabilities, and it has a very large DX services practice. Wipro is headquartered in Bengaluru, India. Gartner estimates that its DX services revenue grew by 10% from 2022 through December 2023. Of this revenue, 91% came from existing clients and 9% from new wins. Wipro's DX services revenue breakdown is 53% from North America, 39% from EMEA, 7% from APAC and 1% from LATAM. The top three platforms by number of FTEs for Wipro are: SAP, Salesforce and Adobe. Its top three industries in this market are: banking and investment services; healthcare and life sciences; and communications, media and entertainment.

Strengths

- **Organizational commitment to DX services:** Wipro has over 230,000 staff across various technology markets, with 20% dedicated to the DX market. This high proportion — one of the largest outside specialized agencies — highlights Wipro's focus on the DX market. Most of its work involves platform services and UI design, with 6,000 staff providing marketing services, a significant number within this cohort.
- **Strong technical skills across multiple platforms:** With a heritage in system integration, Wipro has developed a solid, technology-agnostic capability to build out DX platforms across a wide variety of technologies. It has strong partner status with the seven major DX platform providers: Adobe, Optimizely, Oracle, Salesforce, SAP, Shopify and Sitecore. Wipro has over 9,000 certifications and almost 10,000 technical staff across these seven DX platforms.
- **Industry-specific solutions:** Wipro has invested in its industry knowledge and has capabilities to go to market by industry. In the DX market, Wipro has grown industry-specific IP and assets like its Consumer Insights Platform (CIP) and Endless Aisle. It also has consulting capabilities for banking, financial services and insurance, as well as health, auto, retail and manufacturing.

Cautions

- **Limited creative capabilities:** Although strong in platform delivery and marketing transactional work, Wipro is slow to scale its creative capability. Its DX practice has a creative team embedded within it; however, due to staff size, Wipro would need to scale through acquisition or internal growth to support the creative tasks in this market.
- **Geographic strategy limitations:** Compared with other vendors in this research, Wipro has the highest proportion (86%) of service delivery based in APAC for the DX services market. Marketing and content services require target country awareness, so clients looking for these agency skills must ensure that Wipro has the local resources needed.
- **Falls short of providing client-expected insight:** Some clients noted via survey and inquiry frustration with Wipro's ability to bring more DX insight to the engagement. They expected solution recommendations, industry expertise and best practices, and looked to Wipro to take more control of delivery on the ground.

Inclusion and Exclusion Criteria

The criteria for inclusion of service providers in this Magic Quadrant are based on a combination of quantitative and qualitative measures.

Quantitative Criteria

Digital experience service providers included in this Magic Quadrant must satisfy **all four** of the following criteria:

- **A minimum revenue of \$500 million for calendar year 2023** from DX services consulting, implementation and ongoing support, as defined in the Market Definition of this Magic Quadrant.
 - This includes DX strategy consulting, solution design, DX implementation, and ongoing services and support for the DX ecosystem and managed services (marketing, design and content and sales/lead generation).
 - This specifically excludes revenue from software, DX software maintenance/support and contact center infrastructure integration.
- Have **no more than 75%** of its DX services revenue generated from within a single region.
 - Providers must have clients headquartered within at least three of the five major regions: North America, Latin America (LATAM), Europe, the Middle East and Africa (MEA), and Asia/Pacific (APAC).
- Have **capabilities across at least three of the five DX segments:** experience design, experience solution implementation, experience solution operations, creative services and marketing services.
 - One of these segments must be either creative and/or marketing services.
- Have design and delivery services within **at least three of the seven** major DX platforms: Adobe, Optimizely, Oracle, Salesforce, SAP, Shopify and Sitecore.

Qualitative Criteria

- Overall market interest in and visibility of the service vendor, as determined by serious consideration for selection from enterprise clients and Gartner's analysis of internal and external search patterns.

- Gartner analysts' interactions with enterprise buyers, which reveal interest in specific DX services vendors.
- Demonstrated capability to consistently invest in tools, automation, methodology, frameworks and processes, as well as in resource development, to deliver services in this market.
 - Client feedback in Gartner Peer Insights specific to DX services, as well as analyst interactions with end-user buyers.
 - Analyst opinion of market and supplier.

Evaluation Criteria

Ability to Execute

Product/Service

Core goods and services that compete in and/or serve the defined market. These include current product and service capabilities, quality, feature sets and skills. These can be offered natively or through OEM agreements/partnerships as defined in the Market Definition and detailed in the subcriteria.

Overall Viability

Viability includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. It views the likelihood of the organization continuing to offer and invest in the product, as well as the product position in the current portfolio.

Sales Execution/Pricing

The organization's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and overall effectiveness of the sales channel.

Market Responsiveness and Track Record

Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics

change. This criterion also considers the provider’s history of responsiveness to changing market demands.

Marketing Execution

The clarity, quality, creativity and efficacy of programs designed to deliver the organization’s message to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This “mind share” can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities.

Customer Experience

Products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, availability of user groups and service-level agreements.

Operations

The ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Low
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium

<i>Evaluation Criteria</i>	<i>Weighting</i>
Customer Experience	High
Operations	High

Source: Gartner (November 2024)

Completeness of Vision

Market Understanding

Ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market listen, understand customer demands, and can shape or enhance market changes with their added vision.

Marketing Strategy

Clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements.

Sales Strategy

A sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service and communication. Partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base.

Offering (Product) Strategy

An approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements.

Business Model

The design, logic and execution of the organization’s business proposition to achieve continued success.

Vertical/Industry Strategy

The strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals.

Innovation

Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.

Geographic Strategy

The provider’s strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the “home” or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (November 2024)

Quadrant Descriptions

Leaders

Leaders are performing well in all aspects of DX services, from digital experience design and platform implementation through to content creation and marketing. They are gaining traction in agency and technical services, as well as increasing awareness and mind share in this market. Leaders have a clear vision of market evolution and are actively building competencies and assets to sustain their leadership position in this market.

Challengers

Challengers are currently executing well in their chosen disciplines and segments of work. However, they have a less well-defined or comprehensive understanding of the market's evolution compared with Leaders. Consequently, they may be either positioned to push into a Leader spot in the future, or lack the decisiveness and confidence needed to invest strategically in preparation for future market direction.

Visionaries

Visionaries articulate important trends, direction and potential evolutionary aspects of this market. However, they have not yet demonstrated a position to fully deliver and consistently execute on that vision at scale and with increasing DX expectations. Visionaries need to improve their experience and agency service delivery, or increase their ability to execute from a wider set of technologies and platforms.

Niche Players

Niche Players focus on particular segments of this market, mainly technology platforms, client size and geography. They may also target specific personas (for example, consumer, employee, citizen and student). Their Ability to Execute is limited to those areas of focus. Niche Players' ability to evolve a comprehensive market vision may be affected by selective focus or investment priorities in other areas.

Many of the providers in this segment received positive client feedback, and many can be considered leading players within their niche market focus.

Context

This Magic Quadrant addresses the digital experience service capabilities of 15 providers that meet Gartner’s criteria for inclusion. It is a point-in-time analysis, with the status of all provider profiles reflected as of October 2024. Quantitative data collected was for a 12-month period ending 31 December 2023. As part of the research, the analyst team generated over 1,000 separate data points that collectively determined the placement of the dots on the Magic Quadrant graphic.

When considering DX services, clients are advised not to simply select service providers in the Leaders quadrant. A provider may appear in a particular quadrant based on Gartner’s extensive analysis across the full-service life cycle in many industries and other criteria. However, for any given deal, a client company’s selection criteria will be narrower and more specific to the scope of work or use case they wish to engage the provider to deliver. Consequently, providers in the Challengers, Visionaries or Niche Players quadrants may prove to be more appropriate for the engagement. A more detailed analysis of the service providers’ capabilities, with scoring based on different use cases, is available in [Critical Capabilities for Digital Experience Services](#).

Additionally, because the inclusion criteria in the Magic Quadrant result in the analysis of a subset of providers in the DX services market, clients should not disqualify any potential competitors simply because they do not appear in this research. Other IT service providers not evaluated in this Magic Quadrant may present better alternatives for your business requirements. Consider using a “sweet-spot” analysis to ensure you have the optimal basis and evaluation criteria for selecting the most suitable providers. A Gartner analyst can help with a shortlist of the most suitable candidates based on client requirements.

About the Vendor Profiles

Each vendor profile includes a summary of key characteristics of that provider’s practice, including growth, geography and client size. It also reviews strengths and cautions regarding DX services, emphasizing the areas where the providers are strong and the areas that need improvement.

Participating providers were asked to provide a percentage breakdown of revenue derived from clients of different sizes by number of employees (January 2023 through December 2023).

Gartner has chosen to include information on each provider’s practice according to the following areas:

- **Introduction:** This outlines the type and scope of services that service providers are mainly focused on.
- **Growth:** The providers in this Magic Quadrant are estimated to have grown DX services revenue, as a group, 5% year over year. Providers' ability to grow solidly offers an indication of their investment, focus and vision in the DX services practice, and their ability to take advantage of opportunities.
- **Client geography:** We break down where each provider's revenue comes from, indicating the regions where the provider is strongest and has the largest number of clients. It is worth noting that the majority of all client revenue is generated in North America.
- **Industry:** Some providers are industry-agnostic, some are laser-focused on only a few industries, and some are more focused on a set of industries but work with clients in multiple industries. This area serves as an indication of the industries that are more prominent (based on the number of clients and percentage of revenue) for providers, and the industries in which providers have experience (see Note 2). However, a focus on a particular industry does not always mean that other industries are excluded from coverage.
- **Client size:** Participating providers were asked to provide a percentage breakdown of revenue derived from clients of different sizes by number of employees. This information was used to determine the size of the organization that is the provider's "sweet spot." The five segments are: very small organizations, with less than 500 employees; small organizations, from 500 to 999 employees; midsize organizations, from 1,000 to 2,499 employees; large organizations, from 2,500 to 9,999 employees; and extra-large organizations of more than 10,000 employees.
- **Digital experience focus:** This looks at the proportion of the overall services business dedicated to DX services.

Note that additional information on suitability for specific use cases, delivery capacity, resources and capabilities — such as creative and marketing services — can be found in the companion **Critical Capabilities for Digital Experience Services**. We strongly recommend that these two resources be used together to get the best understanding of provider reach, capability and suitability.

Many capable providers were not assessed as part of our analysis due to not meeting this Magic Quadrant's inclusion criteria and methodology (see the Inclusion and Exclusion

Criteria section). Some of these may even be a better fit for specific DXe services engagements, depending on the size and complexity of the engagement, geography, industry and other factors. Clients are advised to speak with a Gartner analyst to narrow down a shortlist of best-fit service providers covered in this Magic Quadrant, and to discuss providers not covered here. Clients should also check the referenceable customers of the providers and customer references on Gartner's Peer Insights platform.

Market Overview

This is Gartner's first version of Magic Quadrant for **Digital Experience Services**.

Digital experience (DX) services help businesses remain competitive by focusing on creating engaging and seamless experiences for their customers, employees or citizens. Positive digital experiences for both internal and external users build stronger relationships, increase awareness and loyalty, and drive growth.

Vendors in this market provide services that include advisory, design, implementation and operational services. These services focus on creating optimal user experiences by designing and evolving digital experiences. They include technical services and, more importantly, creative, content and marketing operations.

Based on estimates from the 15 service providers in this Magic Quadrant, they collectively received \$62 billion in revenue for their DX services engagements in 2023. Overall, these 15 providers posted total revenue of just under \$350 billion for the same period, with an average of 26% focused on the DX market. Note this market is currently undergoing significant change, as digital agencies, business consultancies and technology systems integrators (SIs) are all looking to expand to provide a full service (technology, design, creative and marketing) of DX services. The focus on these services ranges from a low 5% for many of the large technology providers to over 50% for the digital agency providers.

As the market evolves to full-service providers, all the vendors are developing new capabilities to address areas where they lag behind. The large agencies are adding technology capabilities, while the SIs are acquiring smaller digital agencies or recruiting design and creative staff. Staff allocated to these services range from 8,000 to 100,000, with an average of 30,000 over these 15 service providers. Gartner has identified five use cases to cover the full range of services: design; solution implementation; solution operation; creative services; and marketing services. Each vendor type has strengths in different use

cases. Among the over 500,000 FTEs across the 15 vendors that provide DX services included in this research, 40% are engaged in technical implementation; 27% in design, creative and marketing; and the remaining 33% in ongoing services, supporting the martech platforms (technology and content).

⊕ Evidence

Note 1: Organization and DX Services Sizing Decode

Size definitions within this research are based on the number of aggregated resources used in that category:

DX services market practice sizing:

- Small: 1,000 or fewer FTEs or resources
- Medium: 1,001 to 10,000
- Large: 10,001 to 30,000
- Very large: 30,001 to 60,000
- Extra large: More than 60,000

Organization sizing:

- Small: 1,000 or fewer
- Medium: 1,001 to 10,000
- Large: 10,001 to 100,000
- Very large: 100,001 to 500,000
- Extra large: More than 500,000

For this research, the vendors were questioned on their capabilities for the following technologies. There are more options (see [Magic Quadrant for Digital Experience Platforms](#)), but the vendor assessments are based on the following seven technologies:

- Adobe
- Optimizely
- Oracle
- Salesforce
- SAP
- Shopify
- Sitecore

Note 2: Industries

This Magic Quadrant addresses the capabilities of the included providers in the following industries:

- **Banking and investment services**
- **Communications, media and entertainment:** Includes telecommunications; information technology services and software; entertainment; broadcasting and cable; technical and consumer services
- **Government:** Includes national; international; local and regional government
- **Healthcare and life sciences:** Includes physician; hospital; health insurance (payer)
- **Insurance:** Includes life; property and casualty insurance
- **Manufacturing and natural resources:** Includes automotive; industrial; discrete; chemicals; metals; equipment; construction; natural resources; textiles and apparel; paper; agriculture; food and consumer
- **Other:** Includes aerospace and defense; auto and mobility; high tech; wholesale goods are included in retail and/or consumer goods.
- **Retail:** Includes general retailers; grocery; quick-service restaurants; speciality hard and soft lines

- **Transportation:** Includes air transport; motor freight; rail and water; warehousing; couriers and support services

⊕ Evaluation Criteria Definitions

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