

The Forrester Wave™: Global Digital Experience Agencies, Q4 2019

The 14 Service Providers That Matter Most And How They Stack Up

by Ted Schadler

November 12, 2019

Why Read This Report

In our 24-criterion evaluation of global digital experience agencies, we identified the 14 most significant ones — Accenture, Capgemini, Cognizant, Deloitte, EPAM, IBM, Isobar, MRM//McCann, Publicis Sapiant, PwC, TCS, VMLY&R, Wipro, and Wunderman Thompson — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery professionals select the right one for their needs.

Key Takeaways

Deloitte, Accenture, Publicis Sapiant, IBM, And PwC Lead The Pack

Forrester's research uncovered a maturing market in which all providers can do most work, but Deloitte, Accenture, Publicis Sapiant, IBM, and PwC are Leaders; VMLY&R, TCS, Isobar, EPAM, Wipro, Cognizant, and Capgemini are Strong Performers; and Wunderman Thompson and MRM//McCann are Contenders.

Portfolio Breadth In Support Of Experience-Led Transformation Differentiates The Leaders

Digital experiences have risen to the level of strategic imperative, and experience-led transformation has become the mission for any digital business. These service providers offer a coordinated portfolio of services to help you manage digital strategy and experience-led transformation. But we also track 60 other digital experience agencies that might be a good fit for a specific project, depending on your needs.

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Experience-Led Transformation Sets The Bar For Experience Agencies

The future of digital experience looks nothing like its past. In the past, a digital customer experience (CX) was typically a website, an app, or a campaign powered by a martech/adtech stack.¹ But today and forevermore, a digital experience is the entirety of the relationship that a customer or employee has with your company. Just imagine starting a business or launching a product: Could you imagine doing it without a digital-first engagement model? Digital experiences now echo and support the entire customer journey, either directly through self-service or indirectly through employees.

This steady rise of your digital experience requirements has pushed the agencies and consultancies that seek your business to expand their portfolios of services with new capabilities in consulting, strategy, design, marketing, commerce, innovation, security, and organizational change. They have ramped up their research and program management capacity. They have expanded their creative and product engineering and physical design skills. So, how are they doing? Pretty well, we'd say. But client adoption of this expanding range of services varies widely from provider to provider. That said, we'd recommend any of the firms in this report, depending on your specific needs. In this, our third biannual Forrester Wave™ analysis, we have evaluated the largest and most important digital experience agencies — those that:

- › **Lead with experiences and follow through with transformation.** Gone are the days when a website sat like an appendage on the side of the business. To be useful today, any digital touchpoint must solve a customer's immediate problem. That means any experience initiative requires recrafting the processes and systems to fulfill the promise. Digital experience agencies with strong strategy, consulting, and people practices will go beyond the front office to help you transform the middle and back office — for example, with a digital operations platform.²
- › **Bring creative thought and expression to differentiate your brand experience.** CX Index™ scores have flattened.³ Brands have delivered easy and effective experiences that all look the same. To move the needle on customer experiences, brands and B2B companies practicing account-based engagement must build digital experiences with emotional resonance — that fully express the values of the brand.⁴ Digital experience agencies with strong creative and marketing capabilities can help you fulfill this opportunity.
- › **Integrate a portfolio of strategy, design, data, technology, and program services.** Service providers have grown through acquisition — sometimes successfully by adopting the cultural traits of acquired companies, and sometimes with poor integration and retention results. Technology and data anchor every engagement — but these are capabilities in service of experiences, which means the teams must work well together. The real trick is the extent to which the service provider unites services to solve your complex, experience-led transformation needs. Digital experience agencies with simplified organizational structures, Agile teaming models, and flexible commercial models are best.

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- › **Deliver consistently in every region you inhabit.** We focused on providers with a presence in North America, Europe, and Asia Pacific. Many also have offices in Latin America and the Middle East and Africa. The most common deployment model is industry account teams with Agile delivery teams supported by deep pools of expertise in the various disciplines. They increasingly use a blended delivery model, with some staff onsite, some nearby, and some in global delivery centers to balance agility, alignment, scale, and cost. The best digital experience agencies operate horizontal practices to create guilds of expertise that they can quickly assemble, integrate, and deploy anywhere in the world.

Evaluation Summary

The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top digital experience agencies in the market and does not represent the entire service provider landscape. You'll find more information on 30 other digital experience agencies in our Now Tech report, and we have detailed information on an additional 30 regional and discipline specialists.⁵

We intend this evaluation to be a starting point only and encourage clients to view the evaluations and adapt criteria weightings using the Excel-based service provider comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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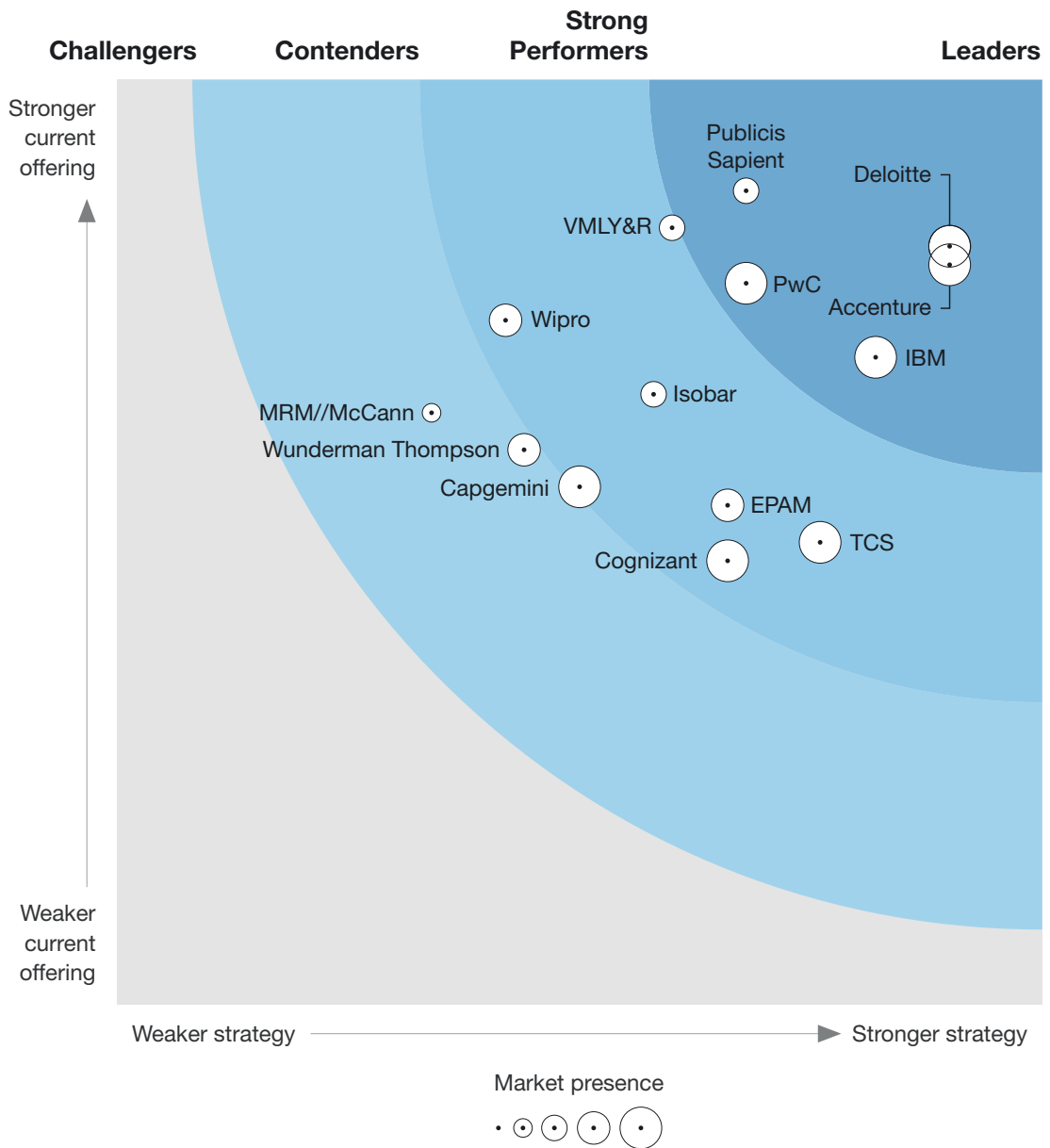
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FIGURE 1 Forrester Wave™: Global Digital Experience Agencies, Q4 2019

THE FORRESTER WAVE™

Global Digital Experience Agencies

Q4 2019



The Forrester Wave™: Global Digital Experience Agencies, Q4 2019

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FIGURE 2 Forrester Wave™: Global Digital Experience Agencies Scorecard, Q4 2019

	Forrester's weighting	Accenture	Capgemini	Cognizant	Deloitte	EPAM	IBM	Isobar
Current offering	50%	4.00	2.80	2.40	4.10	2.70	3.50	3.30
CX insights and strategy services	10%	5.00	3.00	1.00	3.00	1.00	3.00	5.00
Experience design services	5%	5.00	5.00	3.00	5.00	1.00	5.00	5.00
Creative services	5%	5.00	1.00	3.00	3.00	1.00	3.00	5.00
Content services	5%	5.00	1.00	3.00	5.00	1.00	1.00	3.00
Customer data management services	5%	5.00	5.00	3.00	3.00	3.00	3.00	3.00
Privacy and compliance services	5%	3.00	3.00	1.00	3.00	5.00	3.00	1.00
Analytics services	5%	5.00	5.00	1.00	5.00	3.00	5.00	3.00
AI and ML services	5%	5.00	1.00	1.00	3.00	5.00	5.00	1.00
Marketing services	10%	3.00	1.00	3.00	5.00	1.00	3.00	3.00
Commerce services	10%	3.00	3.00	3.00	3.00	3.00	5.00	3.00
Client portals or apps	5%	5.00	1.00	3.00	5.00	3.00	3.00	1.00
Digital product engineering services	5%	3.00	3.00	5.00	5.00	5.00	3.00	3.00
Physical space services	5%	1.00	1.00	1.00	3.00	3.00	3.00	3.00
Emerging touchpoint services	5%	1.00	1.00	3.00	5.00	3.00	5.00	3.00
Digital experience technology services	10%	5.00	5.00	3.00	5.00	5.00	3.00	5.00
Program management services	5%	5.00	5.00	1.00	5.00	1.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Global Digital Experience Agencies Scorecard, Q4 2019 (Cont.)

	Forrester's weighting	Accenture	Capgemini	Cognizant	Deloitte	EPAM	IBM	Isobar
Strategy	50%	4.50	2.50	3.30	4.50	3.30	4.10	2.90
Vision	15%	5.00	3.00	3.00	5.00	3.00	5.00	3.00
Execution roadmap	25%	3.00	1.00	1.00	3.00	1.00	3.00	1.00
Client co-innovation strategy	20%	5.00	1.00	5.00	5.00	5.00	5.00	5.00
Partner ecosystem	20%	5.00	3.00	3.00	5.00	3.00	5.00	3.00
Employee experience	20%	5.00	5.00	5.00	5.00	5.00	3.00	3.00
Market presence	0%	4.65	4.30	4.35	5.00	3.05	4.05	2.35
Number of clients	35%	5.00	3.00	5.00	5.00	2.00	5.00	3.00
Number of employees	35%	4.00	5.00	4.00	5.00	5.00	4.00	2.00
Global offices	30%	5.00	5.00	4.00	5.00	2.00	3.00	2.00

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FIGURE 2 Forrester Wave™: Global Digital Experience Agencies Scorecard, Q4 2019 (Cont.)

	Forrester's weighting	MRM/McCann	Publicis Sapient	PwC	TCS	VMLY&R	Wipro	Wunderman Thompson
Current offering	50%	3.20	4.40	3.90	2.50	4.20	3.70	3.00
CX insights and strategy services	10%	3.00	5.00	5.00	1.00	5.00	3.00	5.00
Experience design services	5%	5.00	5.00	5.00	3.00	3.00	3.00	3.00
Creative services	5%	5.00	5.00	5.00	1.00	5.00	1.00	5.00
Content services	5%	5.00	3.00	3.00	1.00	5.00	3.00	3.00
Customer data management services	5%	5.00	5.00	1.00	3.00	1.00	5.00	5.00
Privacy and compliance services	5%	1.00	5.00	5.00	3.00	5.00	5.00	3.00
Analytics services	5%	3.00	5.00	5.00	3.00	3.00	3.00	3.00
AI and ML services	5%	1.00	3.00	3.00	3.00	3.00	3.00	3.00
Marketing services	10%	5.00	3.00	3.00	1.00	5.00	3.00	3.00
Commerce services	10%	3.00	5.00	5.00	5.00	5.00	5.00	3.00
Client portals or apps	5%	1.00	5.00	5.00	3.00	1.00	3.00	1.00
Digital product engineering services	5%	1.00	5.00	3.00	3.00	5.00	5.00	1.00
Physical space services	5%	1.00	3.00	3.00	1.00	3.00	3.00	1.00
Emerging touchpoint services	5%	1.00	3.00	3.00	5.00	5.00	5.00	1.00
Digital experience technology services	10%	5.00	5.00	3.00	3.00	5.00	5.00	3.00
Program management services	5%	3.00	5.00	5.00	1.00	5.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Global Digital Experience Agencies Scorecard, Q4 2019 (Cont.)

	Forrester's weighting	MRM/McCann	Publicis Sapient	PwC	TCS	VMLY&R	Wipro	Wunderman Thompson
Strategy	50%	1.70	3.40	3.40	3.80	3.00	2.10	2.20
Vision	15%	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Execution roadmap	25%	1.00	3.00	3.00	3.00	3.00	1.00	3.00
Client co-innovation strategy	20%	1.00	3.00	3.00	3.00	3.00	3.00	1.00
Partner ecosystem	20%	3.00	3.00	5.00	5.00	3.00	3.00	3.00
Employee experience	20%	1.00	5.00	3.00	5.00	3.00	1.00	1.00
Market presence	0%	2.00	3.00	4.10	4.30	2.70	3.65	4.00
Number of clients	35%	2.00	3.00	5.00	3.00	3.00	3.00	5.00
Number of employees	35%	2.00	3.00	5.00	5.00	3.00	4.00	3.00
Global offices	30%	2.00	3.00	2.00	5.00	2.00	4.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Offerings

Forrester included 14 service providers in this assessment: Accenture, Capgemini, Cognizant, Deloitte, EPAM, IBM, Isobar, MRM//McCann, Publicis Sapient, PwC, TCS, VMLY&R, Wipro, and Wunderman Thompson.

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual service providers.

Leaders

- › **Deloitte is building from strength to focus on co-innovation and business creation.** Deloitte Digital has 90,000 employees focused on digital experience services in more than 200 offices, serving clients like Chipotle and Verizon in every region around the world. Compared with other service providers we evaluated, Deloitte Digital has higher customer adoption and ratings of its experience design, content services, analytics, and client portal or app services. It has good adoption of creative services, customer data, and commerce as well.

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Deloitte Digital scores well in a number of strategy factors, including vision, client co-innovation, partner ecosystem, and employee experience. Reference customers like Deloitte Digital's end-to-end capabilities, trustworthiness, and strong focus on outcomes. One client told us, "They've always brought a blend of people that are creative and tenacious on our behalf." Yet customers would also like the firm to do better at creating roadmaps and pushing them to think and operate in new ways. Deloitte Digital is a good fit for companies seeking to transform their business models through digital offerings, but less so for companies that need a low-cost global digital operations partner.

› Accenture has integrated its digital services to deliver experience-led transformation.

Accenture Interactive has employees in more than 350 offices focused on digital experience services, serving clients like Carnival, Disney, and Radisson around the world, with concentrations in North America, Europe, and Asia Pacific. Compared with other service providers we evaluated, Accenture has higher customer adoption and ratings in many service lines, including customer experience strategy and insights, creative services, customer data and analytics, and program management. It has higher adoption of marketing and commerce services, but lower adoption of its emerging touchpoint services.

Accenture Interactive scores well in several strategy factors, including vision, partner ecosystem, client co-innovation, and employee experience. Reference customers like Accenture's partnering ability and breadth of services. One customer said, "We've been successful because our top leaders and their top leaders meet every other week." They would welcome improvements in the cohesiveness across the firm's acquired companies and even stronger program management. Accenture is a good fit for large companies, particularly in sectors like banking, hospitality, and telecommunications — where experiences are the driver of business transformation — but less so for companies with a more modest appetite (or budget) for transforming their business models.

› Publicis Sapient tackles transformation with strategy, design, and engineering. Publicis Sapient has 27,000 employees focused on digital experience services in 122 offices, serving clients like Carnival, Carrefour, and Nissan in North America, Europe, and Asia Pacific. Publicis Groupe recently acquired Epsilon, which gives Publicis Sapient access to a consumer profile asset and capability in North America. Compared with other service providers we evaluated, Publicis Sapient has higher customer adoption and ratings of its customer experience strategy and insights, experience design, product engineering, and technology services. It has good adoption of its content and emerging touchpoint services as well.

Publicis Sapient scores well for employee experience in our strategy assessment. It is weaker when it comes to client co-innovation and partner ecosystem. Reference customers like Publicis Sapient's ability to tie initiatives to broader digital transformation and to foster deep partnerships. One customer said, "They really look at things from a business value and customer value perspective to drive impact for our business." They would welcome improvements in account management and in the transparency of the firm's leadership structure to better build trust. Publicis Sapient is a good fit for companies that need consulting services and experience transformation, but not for companies that seek only a project-level engagement.

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- › **IBM integrates its services to focus on business reinvention through design thinking.** IBM iX, part of IBM Services, has 17,000 employees focused on digital experience services in 120 offices, serving clients like Exxon Mobil and United Airlines primarily in North America, Europe, and Asia Pacific. Compared with other service providers we evaluated, IBM iX has higher customer adoption and ratings of its experience design, analytics, and artificial intelligence and machine learning services. It has lower adoption of its content services.

IBM iX scores well in several strategy factors, including vision, client co-innovation, and partner ecosystem. It scores in the middle of the pack on employee experience. Reference customers like IBM iX's co-innovation strategy and its commitment to developing deep partnerships. One client told us, "We've created a culture of digital innovation together." Customers would still like to see improvements in the firm's strategy guidance and better consistency across teams. IBM iX is a good fit for existing clients that seek to build a digital innovation pipeline or for new clients that need scale and a broad set of capabilities; it's not as good of a fit for one-off marketing engagements.

- › **PwC has a unique approach to business transformation with a robust ecosystem.** PwC Digital Services has 30,000 employees focused on digital experience services in 37 offices, serving clients like FCCI Insurance Group and Swedish Railways primarily in North America, Europe, and Asia Pacific. Compared with other service providers we evaluated, PwC has higher customer adoption and ratings of its experience design, privacy and compliance, and program management services. It has lower adoption of its customer data and technology services.

PwC Digital Services scores especially well for partner ecosystem in our strategy assessment. It ranks in the middle of the pack in client co-innovation and employee experience. Reference customers like PwC's end-to-end capabilities, strong industry expertise, and strategy guidance. One customer told us, "They helped us go from design to product in market in six months." They would welcome improvements in PwC's ability to develop execution roadmaps and flexibility around engagement design. PwC is a good fit for existing clients that need deep trust and security skills and those ready to make experience-led transformation their strategy, but less so for firms transforming on a budget.

Strong Performers

- › **VMLY&R blends strength in CX strategy, creativity, and marketing technology.** VMLY&R has 7,000 employees focused on digital experience services in 82 offices, serving clients like Colgate-Palmolive, Dell, and Ford Motor Company in North America, Europe, and Asia Pacific. Compared with other service providers we evaluated, VMLY&R has higher customer adoption and ratings of its content services, marketing, product engineering, and program management services. It has lower adoption of its customer data, commerce, and product engineering services.

VMLY&R scores in the middle of the pack on strategy factors, including client co-innovation, partner ecosystem, and employee experience. But clients like VMLY&R's creativity, account management, and willingness to learn their businesses and cultures. One reference customer

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said, “They have become a part of our family and drive our internal culture.” Clients would like to see VMLY&R bring more strategy ideas and deepen its technology capabilities. VMLY&R is a good fit for companies that need creative expression and the brand brought to life through digital experiences, but less so for companies that need an end-to-end business transformation.

- › **TCS brings technology scale and strength in commerce and emerging touchpoints.** Tata Consultancy Services has 36,400 employees focused on digital experience services in 290 offices, serving clients like KLM and Marks & Spencer in every region around the world. Compared with other service providers we evaluated, TCS has higher customer adoption and ratings of its commerce and emerging touchpoint services. It has lower adoption of its customer experience strategy and insights, creative services, and marketing services.

TCS scores well for its partner ecosystem in our strategy assessment. It is weaker in client co-innovation. Reference customers like TCS’s strong bench of talent and global scale. One client said, “They bring a lot of subject-matter experts to the table and can scale teams quickly.” They would welcome improvements in coordination across projects, agility, and strategy guidance, including the firm’s ability to add value beyond execution. TCS is a good fit for companies focused on commerce or ready to make experiences a priority, but not for companies that need to build stakeholder alignment for experience-led transformation.

- › **Isobar unifies strong technology and creativity with an Agile approach.** Isobar has 5,720 employees focused on digital experience services in 85 offices, serving clients like Adidas, Enterprise Rent-A-Car, and Shiseido in North America, Europe, and Asia Pacific. Compared with other service providers we evaluated, Isobar has higher customer adoption and ratings of its experience design, creative services, and technology services. It has lower adoption of its privacy and compliance and client portal or app services.

Isobar scores well in client co-innovation but in the middle of the pack on other strategy factors, including partner ecosystem and employee experience. But reference customers like Isobar’s strong technical skill set, creative services, and Agile approach. One client told us: “They’re highly creative. They roll up their sleeves and get the job done.” They would like to see improvements in the firm’s program and client management capabilities — including more collaboration and more strategy advice. Isobar is a good fit for companies that need creative expression of their brand and strong technology capabilities, but less so for companies working with large profile databases or implementing end-to-end commerce transformations.

- › **EPAM brings a strong engineering capability for building digital products.** EPAM has 26,500 employees focused on digital experience services in 73 offices, serving clients like GE Healthcare and Southwest Airlines primarily in North America and Europe with a growing presence in Asia Pacific. Compared with other service providers we evaluated, EPAM has higher customer adoption and ratings of its product engineering, technology, and privacy and compliance services. It has lower adoption of its customer experience strategy and insights, experience design, and creative services.

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EPAM scores well in several strategy factors, including client co-innovation and employee experience. It has a weaker partner ecosystem than others in this study. Reference customers like EPAM's strong engineering discipline, predictability of performance, and ability to get the job done. One customer told us: "They have very strong engineering. They deliver against the promise, regardless of the time it takes." They would welcome improvements in program management and strategic guidance and leadership. EPAM is a good fit for companies building digital products and those looking for help with new physical products, but less so for clients seeking a partner for marketing experiences.

- › **Wipro has strong marketing and commerce implementation services.** Wipro Digital has 21,000 employees focused on digital experience services in 147 offices, serving clients like Pitney Bowes and Scandinavian Airlines in every region around the world. Compared with other service providers we evaluated, Wipro Digital has higher customer adoption and ratings of its commerce, product engineering, and technology services. It has lower adoption of its creative services.

Wipro Digital scores in the middle of the pack on strategy factors, including client co-innovation and partner ecosystem. It scores lower in employee experience. But reference customers do like Wipro's continuous engagement model and technology expertise. One customer said, "They bring technology expertise, and their flexibility has been fantastic." They would like to see the firm do a better job challenging their thinking and delivering guidance around strategy. Wipro Digital is a good fit for clients with deep technology needs or that need help implementing a commerce or marketing operation at scale, but less so for an end-to-end business transformation.

- › **Cognizant is strong in product engineering with a partnership mindset.** Cognizant has 22,000 employees focused on digital experience services in 163 offices, serving clients like The Football Association (UK) and Jack in the Box primarily in North America, Europe, and Asia Pacific. Compared with other service providers we evaluated, Cognizant has higher customer adoption and ratings of its product engineering services. It has lower adoption of its customer experience strategy and privacy and compliance services.

Cognizant scores well for client co-innovation and employee experience in our strategy assessment. It scores in the middle of the pack in partner ecosystem. Reference customers like Cognizant's flexible approach, high-caliber resources, and transparency regarding change orders. One client said, "They have been very good about delivering skill sets and quality code in a timely manner." They would like to see improvements in program management and internal organization structure, which can hinder their ability to get up and running quickly. Cognizant is a good fit for existing clients looking for an experience lift or building digital products, but less so for marketing strategies.

- › **Capgemini is building an experience business around cross-functional teams.** Capgemini Invent has 25,600 employees focused on digital experience services in 34 offices, serving clients like 23andMe and Orange in Europe, North America, and Asia Pacific. Compared with other service

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providers we evaluated, Capgemini has higher customer adoption and ratings of its experience design and program management services. It has lower adoption of its creative, marketing, and content services.

Capgemini scores well for employee experience in our strategy assessment. It is weaker in client co-innovation and partner ecosystem strategy. Reference customers like Capgemini's expertise in digital experience and channels, employee retention, and cross-functional teams. One client said, "They have a great team of developers and broad digital capabilities that enhance the customer experience." They would still like better technical management capabilities and for the firm to communicate and simplify complex technical themes in a more digestible way. Capgemini Invent is a good fit for existing clients that need a design or experience lift and new clients focused on commerce, but less so for companies that need a creative services partner.

Contenders

- › **Wunderman Thompson has strong creative services and a data-driven approach.** Wunderman Thompson has 17,885 employees focused on digital experience services in 174 offices, serving clients like PVH and Turner Sports in every region around the world. Compared with other service providers we evaluated, Wunderman Thompson has higher customer adoption and ratings of its customer experience strategy, customer data, and creative services. It has lower adoption of its client portal or app and product engineering services.

Wunderman Thompson scores in the middle of the pack for its partner ecosystem and is weaker than peers in client co-innovation and employee experience. But reference customers like Wunderman Thompson's agility, strategic thinking, and demonstrated commitment to their businesses. One client told us, "They had a strong vision, created a brilliant narrative, then overdelivered on the opportunity." They would like to see the firm do better in how it scales teams, brings innovative ideas, and drives business change. Wunderman Thompson is a good fit for WPP clients that need a strong brand and technology partner, but it's less suited for end-to-end business transformation.

- › **MRM//McCann has marketing and creative power and a rising commerce practice.** MRM//McCann has 3,300 employees focused on digital experience services in 36 offices, serving clients like Coca-Cola and Sunovion primarily in North America and Asia Pacific with a smaller presence in Europe. Compared with other service providers we evaluated, MRM//McCann has higher customer adoption and ratings of its experience design, creative services, and marketing services. It has lower adoption of its client portal or app and product engineering services.

MRM//McCann scores in the middle of the pack on strategy factors, including vision and partner ecosystem, but it's weaker than peers in client co-innovation and employee experience. Reference customers like MRM//McCann's commitment to close partnerships, program management, and strong focus on delivery. One client told us, "They are very collaborative and really understand what we're trying to do from a marketing perspective." They would welcome better integration

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of recently acquired commerce service provider Optaros. MRM//McCann is a good fit for brands that seek to bring digital differentiation to their brand experiences, but less so for new product development or emerging touchpoint projects.

Evaluation Overview

We evaluated service providers against 24 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each service provider's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these services include customer experience strategy, experience design, creative, content, analytics, marketing, commerce, product engineering, and technology services as well as program management. We scored these factors relative to peers based on customer adoption of the service (higher adoption means more capacity and higher quality) as well as on customer ratings (higher ratings mean higher quality).
- › **Strategy.** Placement on the horizontal axis indicates the strength of the service providers' strategies. We evaluated their vision, execution roadmap, partner strategy, client co-innovation strategy, and employee experience. We scored these factors based on data where we had it — for example, Glassdoor scores for employee experience and innovation center adoption for co-innovation — relative to peers.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each service provider's client count, employee headcount, and global office distribution and count.

Vendor Inclusion Criteria

Forrester included 14 service providers in the assessment: Accenture, Capgemini, Cognizant, Deloitte, EPAM, IBM, Isobar, MRM//McCann, Publicis Sapien, PwC, TCS, VMLY&R, Wipro, and Wunderman Thompson. Each of these service providers has:

- › **A portfolio of digital experience services and the capacity to deliver.** These service providers have significant headcount and the ability to deliver services for customer experience strategy, experience design, technology (especially software and cloud), and data and analytics.
- › **Global presence and delivery capability.** We included service providers with presence and a multiyear track record across multiple regions to serve global clients. These service providers routinely help enterprise clients with global deployments.
- › **Market leadership and visibility.** These vendors' commitment is demonstrated by their market visibility and thought leadership for digital business transformation. They are also regularly mentioned by partners and competitors: an indication of their relevance to you.

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- › **Consistent interest from Forrester's clients.** Forrester enterprise clients regularly mention or express interest in working with these service providers for digital experience services.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

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The 14 Service Providers That Matter Most And How They Stack Up

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by September 25, 2019, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

- ¹ See the Forrester report "[A More Perfect Union: Adtech And Martech Convergence Will Revolutionize Marketing.](#)"
- ² See the Forrester report "[Look Beyond ERP: Introducing The DOP.](#)"
- ³ See the Forrester report "[The US Customer Experience Index, 2019.](#)"
- ⁴ See the Forrester report "[Desperate For Differentiation: Creativity Galvanizes The Total Brand Experience.](#)"
- ⁵ See the Forrester report "[Now Tech: Digital Experience Agencies, Q2 2019.](#)"

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