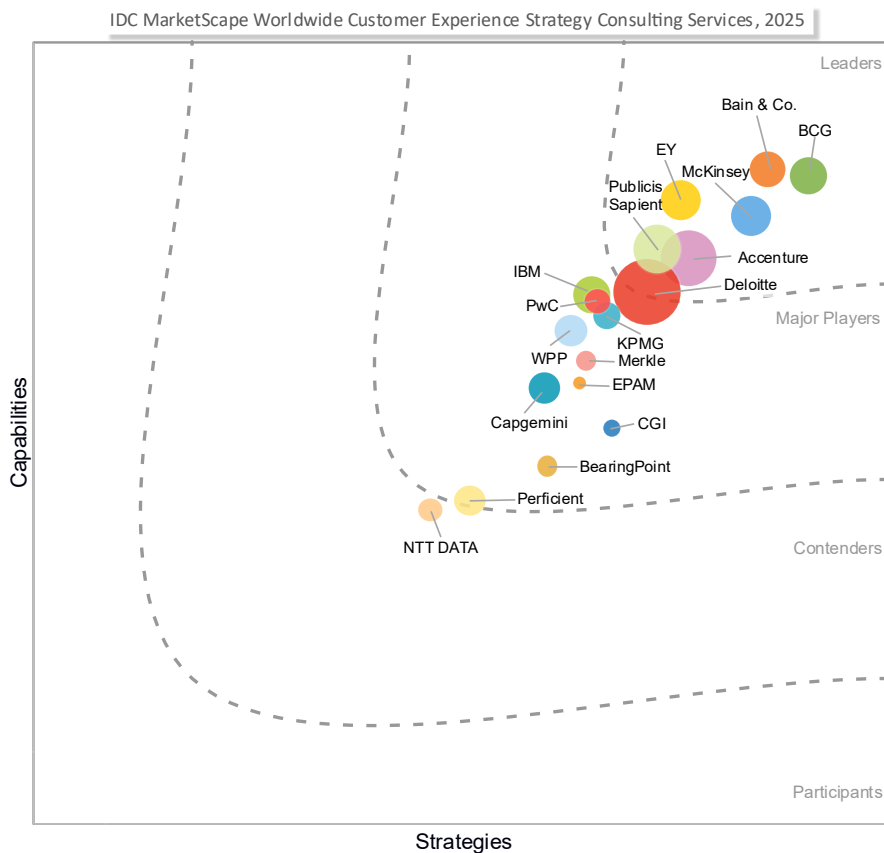# IDC

IDC MarketScape: Worldwide Customer Experience Strategy Consulting Services 2025 Vendor Assessment

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THIS EXCERPT FEATURES EY AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Customer Experience Strategy Consulting Services Vendor Assessment

IDC MarketScape Worldwide Customer Experience Strategy Consulting Services, 2025

Source: IDC, 2025

September 2025, IDC #US52973025e

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Customer Experience Strategy Consulting Services 2025 Vendor Assessment (Doc # US52973025).

IDC OPINION

Customer experience (CX) executives are navigating a rapidly evolving landscape across all parts of the CX life cycle shaped by artificial intelligence (AI) and, more recently, agentic technologies. This era of intelligent customer experiences will give rise to AI-infused business models, which will drive future value exchange between customers and brands. However, while organizations have been implementing digital customer experience solutions, challenges remain in shifting customer perception that brands are delivering on customer expectations, intended outcomes, and translating investments into significant returns. As a result, IDC recognized customer experience strategy as a core market need as part of a complete and sustainable CX transformation approach.

IDC's October 2024 *Customer Experience Management Strategies (CXMS) Survey* found that customer centricity is among the top factors preventing organizations from realizing the full value of their CX programs. In fact, in IDC's 2024 Customer Experience Management Scorecard based on the same survey, we found that just about 12% of organizations demonstrated the highest levels of commitment to customer experience management, and in turn enabling best-in-class business outcomes. Enterprises were found to struggle most with a sound CX strategy and culture, with this dimension having the largest gap between nascent and leading organizations.

Organizations are thirsty for a holistic customer experience strategy to navigate the existential change forced upon by AI while seeking assured paths to value realization. Fundamentally, organizations are not organized to be customer centric. IDC's 2024 *CXMS Survey* found that less than a quarter of organizations apply a unified enterprise CX strategy including executive sponsorship to all CX initiatives. Building a customer-centric organization is among the top strategy and operational approaches that CX executives are planning over the next 12–18 months. In addition to modernizing the CX tech stack, these include upskilling employees for AI-related roles, defining new experiential metrics primed for intelligent experiences, and restructuring operating models to be anchored on customer experience.

In parallel, customer experience strategy consulting providers are evolving, shaped by the convergence of the premium of human experiences, AI-powered CX strategy delivery, and the demand for measurable ROI from CX investments. IDC finds that:

- Leading firms are no longer simply advising on and designing customer journeys; they are embedding CX as a core part of business strategy, linking it to revenue growth, operational efficiency, and organizational transformation. They distinguish themselves through the integration of creative and technical solutions. They align with clients' business goals by offering pragmatic and actionable road maps balanced with innovative CX strategies to accelerate value realization. Their approach prioritizes collaborative partnership, sensitivity about the client's organizational culture, being adaptable, and maintaining transparent communication throughout the engagement.

- Traditional strategy firms continue to lead in high-impact, enterprisewide strategic CX transformations, leveraging C-suite relationships and industry insights.

- Firms that got their start in technology-oriented professional services emphasize their AI-native capabilities and tools, data-driven decisioning, and rapid prototyping but must balance CX creativity and strategy design with their technology heritage.

- Design agencies and digital-native players are pushing integrated creative-technical solutions, though execution consistency is a shortcoming.

Across the market, buyers are prioritizing partners that can align CX strategy with measurable outcomes, adapt to shifting customer expectations, and fuse innovation with execution. The competitive advantage now lies in the ability to deliver adaptive, AI-empowered, and human-centered CX strategies — seamlessly connected from concept to sustained impact.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Inclusion criteria for this IDC MarketScape:

- Vendors must have a defined customer experience strategy consulting services offering.

- Vendors had $25 million+ in annual revenue from customer experience strategy consulting services from the provider's last fiscal year.

- Vendors need to generate customer experience strategy consulting services revenue from each of the three geographic regions (Americas; Europe, the Middle East, and Africa; and Asia/Pacific).

ADVICE FOR TECHNOLOGY BUYERS

The CX strategy consulting providers in this evaluation all have their own defined areas of strengths and weaknesses. As customer experience and IT leaders consider CX strategy consulting services, they should critically assess how each vendor positions their services, specialties, strengths, and weaknesses against the organization's needs. Further, CX leaders must:

- **Match the consulting firm's capabilities to the complexities and scale of CX transformation:** It is vital that organizations have clarity and understand their own strategic context of customer experience needs for which they need a strategy services firm. This is to avoid being influenced by compelling presentations, tools, and case studies, which may not be relevant for their strategic goals. For instance, do customer pain points and associated business transformation demand a CX strategy that spans multiple markets, or requires a niche industry focus with stringent regulatory constraints, or require an organizationwide operating model and business model transformation versus a creative, agency-led experience strategy and design?

- **Look for providers that prioritize value realization:** IDC's 2024 *CXMS Survey* found that gaining buy-in and proving business value for CX initiatives continues to remain a challenge that impedes success of strategic CX transformations. Strong providers begin with the outcome in mind (or partner with the client to define required outcomes) and then develop the right experience strategy to achieve those goals. Evaluate the providers' capabilities to structure relevant outcomes and how these outcomes optimize experience value parity (i.e., optimizing the business' strategic objectives while positively delivering customer desired outcomes and value). Leading providers leverage AI-powered tools that track value realization through the course of their transformation efforts.

- **Assess capability to mobilize change from the C-suite on down:** CX executives must determine if providers can effectively mobilize networks across the C-suite and permeate that across the enterprise. Understand providers' approach to establish CX governance and alignment, organizational redesign capabilities, and how well they can embed customer experience strategy into the business' overall direction versus delivering discrete initiatives that may be point solutions within a particular customer-facing function such as marketing or customer service.

- **Evaluate cultural fit and partnership:** CX executives should seek out providers that can step up to be true partners and work as a single team while still maintaining independence to be able to push back on required ideas and changes. Clients prize providers that foster collaboration, and are sensitive to, and align with, the organization's culture. This is an important factor to succeed

in establishing a sustainable customer-centric operating model, which requires multiple business functions to align to unified customer outcomes. Leading providers also prioritize transparency in communications, especially when exceptions or issues arise, ensuring these hard conversations are had up front rather than holding back. In addition, adaptability and being able to pivot and accommodate clients' needs/changes in an empathetic manner are characteristics of leading providers.

- **Evaluate integrated versus best-of-breed services offerings:** Organizations must evaluate their own existing maturity and spend capacity for CX transformation in determining providers that work best. Consider critical gaps in the experience delivery life cycle spanning CX strategy, experience design, business and operating model change, technology/AI-centric skills, and ability to operationalize a full-fledged, complex CX transformation. For instance, organizations that have a disjointed CX landscape (functional and technology) are best served by beginning with a forward-looking and enterprisewide CX strategy, addressing transformation bottlenecks while prioritizing modernization. Mature organizations may benefit more through strategic use of best-of-breed services firms to gain specific competitive differentiation whether that is developing innovative and disruptive experience-driven business models, creative experience design, or advanced AI/ML capabilities powering experience orchestration. In all cases, the ideal consulting partner offers both deep specialization in CX and the ability to contextualize solutions within broader business strategies.

- **Define their organization's measures of success and outcomes:** An outcomes-based pricing model is starting to grow in importance among many CX technology suppliers — both software and, more recently, services providers. To excel in the digital economy, organizations must evolve to become more experience orchestrated and, as such, create outcome-based key performance indicators (KPIs) that focus on measuring effectiveness of experiences for stakeholders and the organization. Leading providers offer a range of contractual pricing models (e.g., operational outcomes, CX outcomes, and financial outcomes), with the provider often tying a share of their fees to the client's desired customer experience and/or business outcomes. To effectively participate in such risk and reward sharing agreements, CX executives must first have a clear idea of how success is defined within the context of their organization and how that aligns to overall CX outcomes and business objectives.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria

outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Using the IDC MarketScape model, IDC studied 18 organizations that offer customer experience strategy consulting services.

EY

After a thorough evaluation that includes IDC analysis and buyer perception of EY's strategies and capabilities, the firm is positioned in the Leaders category in this 2025 IDC MarketScape for customer experience strategy consulting services.

EY is a global management and technology consulting firm with over 700 offices across 150 countries. EY partners with clients to navigate complexity and shape their future with confidence. It designs, builds, and scales customer-centric strategies, products, services, and experiences to accelerate purposeful growth.

EY's approach to customer experience strategy begins with empathy. With a focus on human centricity, EY designs resonant and exceptional experiences that deliver resilient long-term business growth. Through its approach, the firm unlocks the value between strategy, technology, risk and compliance, supply chain, and human resources to build holistic transformations that sustain.

As of June 2025, EY consolidated its design, creative, CX and AI services under the EY Studio+ umbrella, a globally integrated offering that will combine the organization's full spectrum of services spanning talent in design, sales, marketing and customer experience, deep sector insights, EY.ai, and ecosystem partners. This integrated technology-enabled experience practice combines 37 specialist acquisitions with organically grown EY businesses. EY Studio+ offers planning, journey mapping, system integration, agile implementation and change-management services tailored to customer-centric transformation. EY Studio+ will partner across the C-suite, with particular emphasis on the CMO. The firm also collaborates with technology partners and leverages its global ecosystem to deliver industry-specific CX solutions.

EY is human centric in its approach, putting the client/consumer/citizen/patient at the heart of experience transformation. Its approach embraces the tension between disciplines (strategy, design, technology, culture, risk, ethics, legal, and tax) to deliver on value-based customer and business outcomes.

Strengths

EY's distinguishes itself by the firm's ability to quickly integrate into client organizations and become one with the client team while still maintaining independence to offer unbiased advice and actionable deliverables. On CX strategy engagements, clients value

EY's efforts to conduct significant prework to understand the client's challenges, capabilities, and customer needs, tailoring solutions to meet specific requirements rather than relying on cookie-cutter approaches. EY is prized by clients for its values-driven approach and demonstrating a high moral code of conduct. CX teams go beyond the "contract scope," focusing on broader business impact and purpose while delivering measurable business outcomes. Clients also note that EY excels in guiding clients through change management and organizational transformation, a crucial aspect to consider for firms wishing to sustain gained value beyond surface-level CX improvements.

Challenges

Clients note that sometimes, EY does a disservice to itself by underselling capabilities, focusing on immediate deliverables rather than showcasing the broader future-state impact of CX across deeper areas of an organization. EY's Studio+ offering, which unifies design, research, technology, and marketing for end-to-end CX transformation, is relatively new and lacks extensive road testing, leaving open questions about its ability to consistently deliver on this promise. Some clients observe that EY may appear less innovative in cutting-edge brand experience or digital customer innovation. Finally, EY suffers from the same perception bias that impacts any large, global consultancy — that is, service consistency and outcomes can vary significantly depending on geography, project team, or engagement size, making the client experience highly team dependent.

Consider EY When

EY will be a suitable partner to organizations that want to drive large-scale customer experience transformations, particularly in regulated industries or legacy organizations. For organizations aiming to incorporate complex digital or operational transformations at scale, as part of their CX strategy, EY's integrated teams provide a significant advantage. EY is ideal for clients seeking enterprisewide adoption, stakeholder alignment, and lasting business value, offering a cross-functional approach that spans design, data, analytics, tech stack build, and ongoing experience operations. In addition, with the latest introduction of Studio+, EY stands well positioned to offer a collaborative consulting agency hybrid model for clients that want not only a defined CX strategy but also the internal capabilities and culture to sustain it long term.

APPENDIX

Reading an IDC MarketScape Graph

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

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

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each vendor within the specific market segment being assessed. This IDC MarketScape research for customer experience strategy consulting services was performed at the same time as the worldwide enterprise strategy consulting and digital business strategy consulting services. While there is overlap in these IDC MarketScape documents, our sizing was specific to the respective segments within the overall strategy services market.

IDC MarketScape Methodology

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

Market Definition

Customer experience strategy consulting includes offerings and services to define and transform the organization's overall customer experience to better attract, engage with, sell to, and serve customers, citizens, donors, users, and other ecosystem stakeholders that bring money directly or indirectly into an organization. Services span all aspects of CX strategy from business operations, CX operating models, and organization structure in executing and delivering CX and enabling strategic customer-centric business change. Strategy also focuses on measured business outcomes by linking customer

experience outcomes to business value drivers and financial impact and growth, and a clear road map ensures that experience is put at the heart of the organization.

This IDC MarketScape will assess leading vendors on advisory and transformation enablement services, specifically CX strategy consulting.

Key activities include:

- Advisory and transformation strategy across the full customer life cycle for activities and functions that most affect customer experience, notably:
  - Product and pricing strategy
  - Integrated marketing (essentially advertising, direct marketing spanning both digital and nondigital channels) and any required technology capabilities
  - Customer sales and fulfilment/onboarding
  - Customer service/support
  - Go-to-market/distribution strategy as it impacts customer experience (e.g., choice of partners, partner-led versus nonpartner-led GTM, relationships with third parties in the CX ecosystem)
  - VOC program/customer listening strategy
  - Customer experience analytics/insights strategy
- CX technology advice, such as road map advice on existing and emerging technologies that affect CX
- Advice on the subsequent need for organizational transformation in areas such as business operations (e.g., how business process/workflows, decision-making, cross-functional/departmental collaboration, and employee experience needs to change to better serve the newly defined or updated customer strategy)
- CX operating models (e.g., restructuring teams and processes to deliver against strategically identified customer outcomes and developing/optimizing new roles, teams, and departments as needed to better meet customer outcomes)
- Operational excellence (e.g., measuring business outcomes by linking customer experience outcomes to business value drivers and financial impact and growth)
- Cultural change (e.g., creating a clear road map to ensure that experience is put at the heart of the organization)

Related Research

- *What Today's Enterprises Want from the CX Services Industry of the Future* (IDC #US53644825, July 2025)
- *Practically Scaling and Adopting AI/GenAI for Customer Experience, 2025* (IDC #US52840325, May 2025)
- *Customer Experience Scorecard, 2024: Enabling Enterprises to Achieve Customer-Desired Outcomes and Experiential Value Parity* (IDC #US52181325, March 2025)
- *Top Market Shifts That Are Impacting the CX Market, and How Companies Establish Their 2025 CX Strategies and Initiatives* (IDC #US52840125, February 2025)
- *Bridging the Experience Fulfilment Gap, 2024: Unified Intelligent Experience Orchestration* (IDC #US51663724, December 2024)

Synopsis

This IDC study represents an assessment of the 2025 customer experience (CX) strategy consulting services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a CX strategy consulting firm's success in the marketplace. The evaluation is based on a comprehensive framework including providers' strengths, challenges, and client perceptions and assesses vendors relative to IDC's evaluation criteria and to one another. IDC found that leading providers emphasized their ability to align customer-centric strategies with measurable business outcomes and accelerated business value realization. The document offers insights into the suitability of CX strategy consulting firms for diverse organizational needs and delivering actionable road maps for sustainable CX transformation anchored on emerging AI and agentic technologies in creating competitive advantages for clients.

"Organizations setting the pace in the industry for customer experience are those that blend AI-driven CX technology implementations with a thorough CX strategy grounded in a human-centered approach and measurable outcomes," said Sudhir Rajagopal, research director, Customer Experience Management Strategies at IDC. "As this assessment shows, the market rewards CX strategy consulting firms that can connect adaptive, AI-powered, and human-centered CX strategies to business value. These firms redefine the traditional consultant-client relationship as collaborative partnerships to deliver impactful experiences anchored in sustainable customer-centric operating models that drive customer growth and loyalty."

ABOUT IDC

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

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