

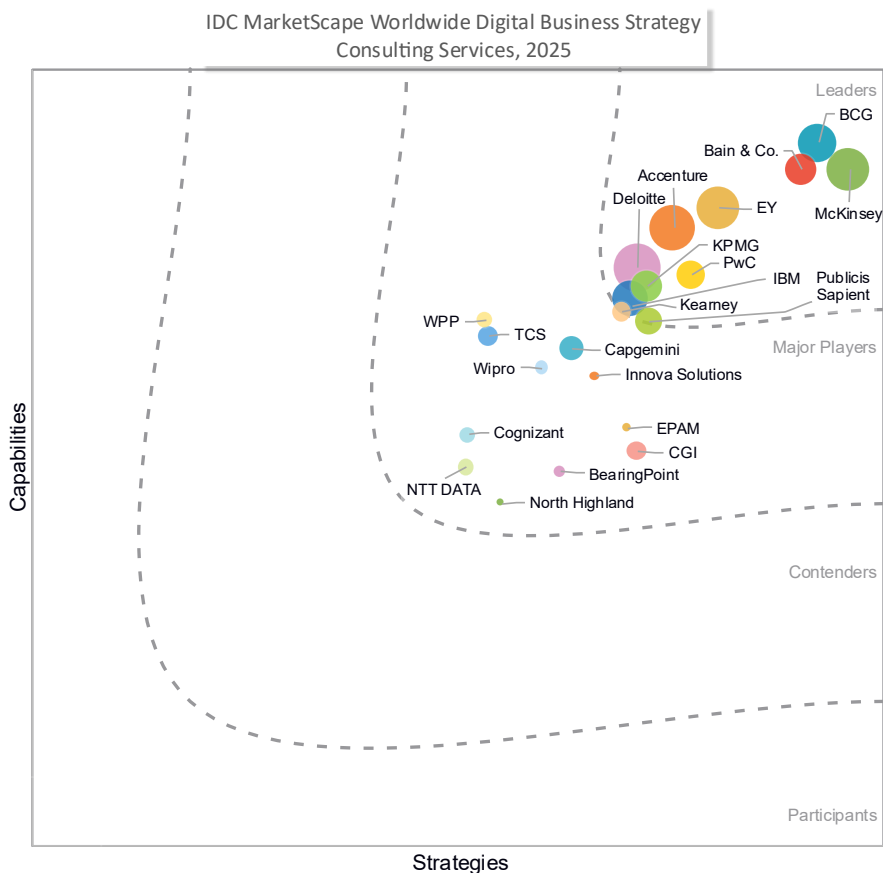
IDC MarketScape: Worldwide Digital Business Strategy Consulting Services 2025 Vendor Assessment

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THIS EXCERPT FEATURES EY AS A LEADER
IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Digital Business Strategy Consulting Services Vendor Assessment



Source: IDC, 2025

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 Digital Business Strategy Consulting Services 2025 Vendor Assessment (Doc # US52036025).

IDC OPINION

This IDC study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of a vendor's strengths and challenges in the digital business strategy consulting services marketplace. This study assesses the capabilities and business strategies of 22 digital business strategy consulting service providers that are global. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing digital business strategy consulting services. A significant component of this evaluation is the inclusion of digital business strategy consulting buyers' perception of both the key characteristics and the capabilities of these providers. This client input was provided primarily from the vendors' clients, supplemented by worldwide survey data.

Key findings of this study include:

- Client references for this group of providers shared with IDC that firms — overall — are quite good at providing client-specific insight. This includes a deep understanding of the clients' culture, business objectives, and technology to maximize the potential of their strategies. Many clients also noted that generally, they are pleased with their provider's customer service delivery, and they feel that their provider helps them become capable of independent strategy creation and execution.
- Clients — on average — were least satisfied with "culture differentiation." Generally, clients noted that their provider's culture was moderately differentiated, meaning there are a lot of similarities among the providers. In a market where many firms do most things well or well enough, differentiation is key. Providers with a strong and differentiated culture that permeates throughout the firm will stand out more from the crowd.
- The majority of clients IDC spoke with would strongly recommend their provider. Even so, clients still have a long and wide-ranging "wish list" for their providers. Top wishes include greater flexibility of the "packages" of client teams available to ensure the clients receive only what they need/want, fewer slide decks, a

differentiated fee model for access to experts after the engagement, and artificial intelligence (AI) savings evident in their bills.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

The inclusion criteria for this IDC MarketScape are as follows:

- Vendors must have a defined digital business strategy consulting services offering or proven offerings of evaluated services.
- Vendors had a minimum of over \$25 million in annual digital business strategy consulting services in 2024.
- Vendors need to generate digital business strategy consulting services revenue from each of the three geographic regions (i.e., the Americas; Europe, the Middle East, and Africa; and Asia/Pacific).

ADVICE FOR TECHNOLOGY BUYERS

- **Conduct a comprehensive vendor selection process.** Use this IDC MarketScape as a tool to not only shortlist vendors but also to evaluate their capabilities and experience across digital business strategy for your specific needs. Evaluate their demonstrated experience in delivering similar initiatives to yours.
- **Evaluate how success will be defined and measured and the rigidity of contracts.** Success can be defined and measured in many ways and often is not clearly defined and is vague. Ask potential providers how they will define and measure success specifically to your initiatives. This could go beyond increased revenue and decreased cost and include the creation of new revenue streams, increased agility, greater compliance, and so forth.
- **Ensure your provider has tangible expertise across new, relevant technologies.** Request that potential providers show demonstrated expertise in relevant technologies. For newer and rapidly evolving technologies (e.g., AI), their proven expertise may be from internal, using their organization as "client zero."
- **Consider the degree the provider invests in its talent.** A provider's investment in its talent is critical to success. Vendors should provide their talent with timely, appropriate training and skilling and provide space to do these. This will help with the provider's ability to bring the best-fit resources.
- **Take into account proprietary assets, tools, and frameworks.** It's hard to find a provider that does not offer at least one proprietary asset. Evaluate the proprietary tools, methodologies, and frameworks the provider offers and how they complement your goals. Be sure to gather information about whether cost

is included or not, whether the asset will be left behind, integration constraints, and interoperability. You should also consider the vendor's onshore/nearshore/offshore delivery capabilities as well as R&D and innovation centers.

- **Evaluate the stretch of the providers' partner and alliance network.** Take into account the comprehensive partner and alliance ecosystem. In addition to specific technology partnerships, evaluate how the provider fills capability gaps both upstream and downstream from your initiative. A well-rounded ecosystem also includes academia/institutions, as well as technology and service providers.

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.

EY

After a thorough evaluation of EY's strategies and capabilities, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for digital business strategy consulting services.

IDC notes that this vendor did not actively participate in this IDC MarketScape document. Its evaluation is based on publicly available information as well as IDC's existing knowledge of the vendor's offerings based on previous IDC research.

Ernst & Young (EY) is a global professional services firm with around 400,000 employees in over 150 countries. It offers audit, tax, consulting, and strategy services. EY supports clients in digital transformation, sustainability, and risk management and is restructuring into 10 global regions to enhance integrated, cross-border service delivery.

EY's digital business strategy consulting capability is crafted to assist organizations in navigating the multifaceted landscape of digital transformation by aligning technology initiatives with broader business objectives. The company's approach is deeply rooted in leveraging data and analytics to provide actionable insights that inform strategic decision-making.

A pivotal aspect of EY's strategy is its focus on agility and innovation. The company recognizes the rapid pace of change in digital markets and collaborates with clients to develop flexible strategies that can adapt to evolving conditions. This involves fostering a culture of innovation within organizations and encouraging experimentation and

iterative development processes. EY's consulting services span a wide array of areas, including digital marketing, customer experience enhancement, operational efficiency, and IT infrastructure modernization. The company's consultants work closely with clients to customize solutions that meet specific needs, ensuring alignment with long-term business goals. This tailored approach allows businesses to effectively address their unique challenges and opportunities in the digital realm.

Strengths

EY is known for forming skilled, tailored teams and providing strategic guidance that helps clients manage complexity and achieve their objectives. Its collaborative approach emphasizes aligning with client priorities, fostering cultural change, and equipping internal teams with the capabilities needed to continue driving results after the engagement concludes.

Challenges

EY's large organizational structure and global scale can introduce complexity and coordination challenges, potentially affecting speed, consistency, and focus in strategy delivery. While clients value its scale and deep specialization in niche areas, they may experience variability in talent quality and a less streamlined experience.

Consider EY When

Consider EY when your organization needs strategic support that aligns with operational, financial, and technology goals, especially during periods of transformation, market entry, or restructuring. EY's connection to its broader service lines enables integration across areas like transactions, tax, and digital implementation, making the company suitable for complex business environments and organizations seeking continuity from strategy through execution.

APPENDIX

Reading an IDC MarketScape Graph

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

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

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each vendor within the specific market segment being assessed. This IDC MarketScape research for digital business strategy consulting services was performed at the same time as the worldwide enterprise strategy consulting and customer experience strategy consulting studies. 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

Digital business strategy consulting involves advising organizations on how to leverage digital technologies to achieve their strategic goals. Key activities include:

- **Digital transformation planning:** Advising on the integration of digital technologies across the business
- **Customer experience design:** Advising on improving customer interactions through digital means
- **Digital marketing design:** Developing strategies for online customer engagement and growth
- **Data strategy:** Advising on data required for informed decision-making
- **Innovation and business development strategy:** Planning for new digital products, services, or business models

- **Operational optimization strategy:** Advising on processes or cultural changes required to operate as a digital business (including digital tools and automation)
- **Cybersecurity strategy:** Planning for the protection of digital assets and data privacy

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Enterprise Strategy Consulting Services 2025 Vendor Assessment* (IDC #US52035225, forthcoming)
- *IDC Market Glance: Digital Business Professional Services, 3Q25* (IDC #US52789825, July 2025)
- *IDC PlanScape: Digital Business Strategy Services* (IDC #US52838925, June 2025)
- *Market Analysis Perspective: Worldwide Digital Business Professional Services, 2024* (IDC #US51489624, September 2024)

Synopsis

The IDC study on worldwide digital business strategy consulting services evaluates 22 global providers based on their capabilities and strategies in digital business consulting. It highlights client perceptions, vendor strengths, and challenges, emphasizing differentiation, customer-centric insights, and adaptability to emerging technologies like AI. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"Digital strategy consulting is the bridge between innovation and execution, empowering businesses to navigate disruption, harness emerging technologies like AI, and achieve transformative success in a competitive global landscape," says Erin Hichman, research manager, Digital Business Professional Services at IDC. "The 22 vendors assessed in this study have established themselves as trusted providers in digital business strategy consulting, with the ability to advise organizations on how to leverage digital technologies to achieve their strategic goals."

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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