



Everest Group Marketing Services PEAK Matrix® Assessment 2025

Focus on IBM

June 2025



Introduction

The marketing services landscape is undergoing rapid transformation, with service providers increasingly focusing on technologies that enable data-driven, personalized, and AI-powered customer experiences.

The ecosystem is experiencing growing investments in technologies such as gen AI, agentic AI, and advanced analytics, enabling intelligent decision-making, automation, and hyper-personalization. Service providers are increasingly investing in partnerships and in-house technologies to streamline marketing service offerings by optimizing content creation, customer segmentation, and campaign performance.

Service providers are expanding their scope of services by merging technology and creative capabilities.

Simultaneously, service providers continue to consolidate and unify their marketing services offerings under integrated branded offerings, positioning themselves as one-stop shops to meet the needs of customers increasingly prioritizing vendor consolidation.

The assessment is based on Everest Group's annual Request for Information (RFI) process for calendar year

2024, interactions with leading marketing service providers, client reference checks, and ongoing analysis of the marketing services market. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, and domain investments.

The full report includes the profiles of the following 30 marketing service providers featured on the [Marketing Services PEAK Matrix® Assessment 2025](#):

- **Leaders:** Accenture Song, Capgemini, Cognizant, Deloitte Digital, IBM, Infosys, Merkle, TCS, and VML
- **Major Contenders:** Concentrix, DEPT, Dentsu Creative, Digitas, eClerx, EXL, HCLTech, .Monks, PwC, Rightpoint (a Genpact company), RRD, Stagwell, Tech Mahindra, TP Infinity, and Wipro
- **Aspirants:** Comviva, Concord, Exelatech, HGS, HH Global, and Randstad Digital (Cella)

Scope of this report

Geography: global

Industry: all

Services: marketing services

Marketing Services PEAK Matrix® characteristics

Leaders

Accenture Song, Capgemini, Cognizant, Deloitte Digital, IBM, Infosys, Merkle, TCS, and VML

- Leaders have end-to-end capabilities across the marketing services value chain including creative production, media services, content management, CX strategy and design, loyalty services, commerce, and data and analytics. They have also built strong advisory and strategy offerings to augment their services
- Leaders have built a strong and balanced delivery portfolio, with a significant presence in all major geographies and a workforce that is adept in multiple languages
- Leaders have developed robust end-to-end MarTech capabilities for customer research, journey mapping, omnichannel customer view, and loyalty management, and they maintain a robust ecosystem of partnerships with leading MarTech/AdTech vendors
- They differentiate themselves through their long-term vision of managing emerging marketing services themes such as AI including gen AI and automation and innovative delivery models

Major Contenders

Concentrix, DEPT, Dentsu Creative, Digitas, eClerx, EXL, HCLTech, .Monks, PwC, Rightpoint (a Genpact company), RRD, Stagwell, Tech Mahindra, TP Infinity, and Wipro

- Major Contenders have selective capabilities in parts of the marketing services value chain and actively pursue organic and inorganic investment opportunities to fill in their portfolio gaps
- They are building capabilities to serve different geographies and industry segments, while specializing in a few regions and verticals
- They continue to invest in emerging technologies and platforms and partner with third-party vendors to cater to the demands of a diverse clientele

Aspirants

Concord, Comviva, Exelatech, HH Global, HGS, and Randstad Digital (Cella)

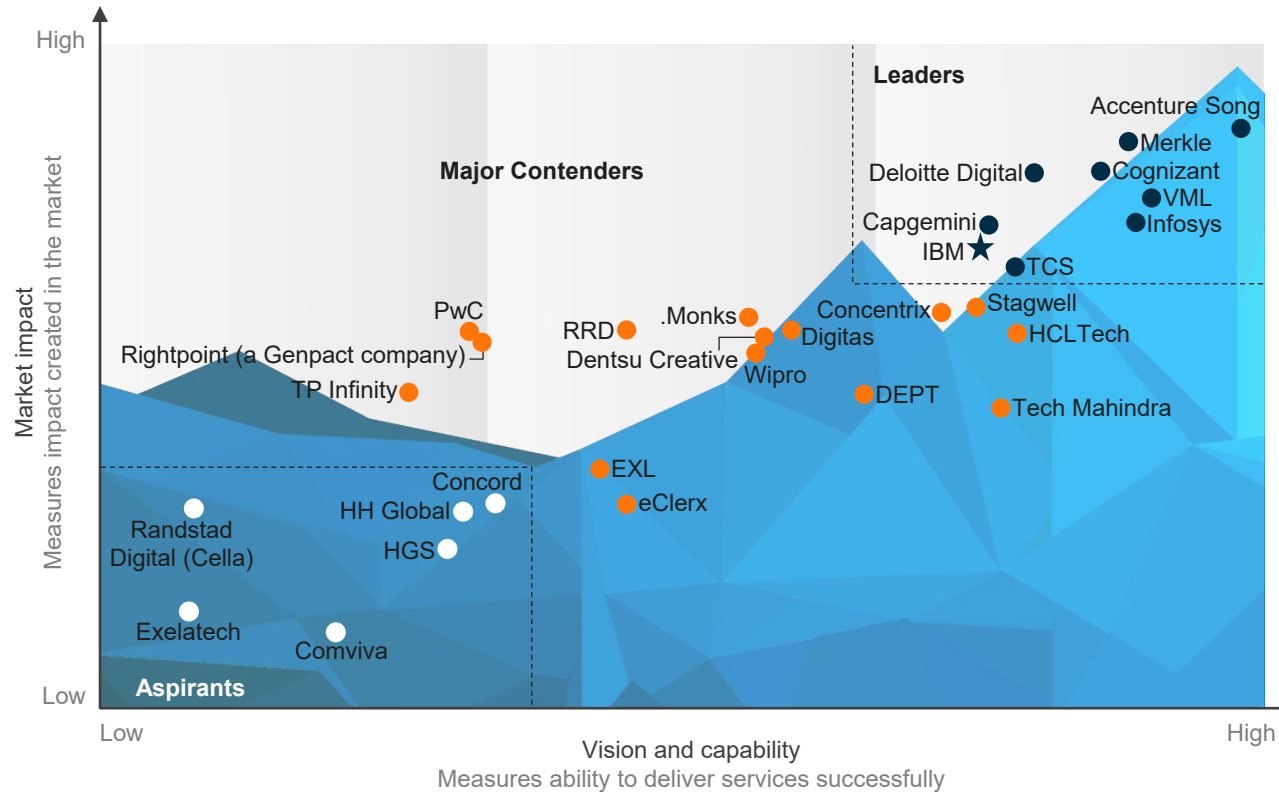
- Aspirants, with their limited scope of services, are focused on niche geographies, industries, or buyers, and have a relatively small scale of operations and a skewed shoring mix
- They offer innovative service delivery models; however, their capabilities in specialized services such as creative and media are currently limited

Everest Group PEAK Matrix®

Marketing Services PEAK Matrix® Assessment 2025 | IBM is positioned as a Leader and a Star Performer

Everest Group Marketing Services PEAK Matrix® Assessment 2025^{1,2}

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessments for Deloitte Digital, Dentsu Creative, DEPT, Digitas, HH Global, PwC, Rightpoint (a Genpact company), Stagwell, VML excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

² Assessment of Exelatech, Concentrix, and .Monks includes partial inputs from the service provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, service providers public disclosure, and Interaction with buyers
Source: Everest Group (2025)

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Overview

Company overview

IBM is a multinational technology and consulting company headquartered in Armonk, New York. It operates in various technology sectors including cloud computing, AI, quantum computing, cybersecurity, and enterprise software. IBM provides AI-driven managed marketing services to improve marketing operations. It uses AI tools and automation to enhance marketing strategy, processes, content creation, campaign execution, and marketing platform support. The focus is on optimizing marketing workflows and delivering personalization at scale through data-driven customer experiences.

Overall marketing revenue (CY2024)

Not disclosed

Number of active clients for marketing services

Not disclosed

Number of active clients for marketing services

Not disclosed

By geography

● N/A (0%) ● Low (1-15%) ● Medium (15-25%) ● High (>25%)

- North America
- Asia Pacific
- Australia and New Zealand
- United Kingdom
- Latin America
- Rest of Europe
- Middle East and Africa

By Industry

● N/A (0%) ● Low (1-10%) ● Medium (10-20%) ● High (>20%)

- Automotive
- Energy and utilities
- Electronics, hi-tech, and technology
- Public sector
- BFSI
- Healthcare and life sciences
- Telecom, media, and entertainment
- Retail, distribution, and CPG
- E-commerce
- Manufacturing
- Travel, transport, and hospitality
- Others

By service segment

● N/A (0%) ● Low (1-10%) ● Medium (10-20%) ● High (>20%)

- Customer
- Marketing support
- Content
- Media
- Campaign

By buyer size

● N/A (0%) ● Low (1-10%) ● Medium (10-20%) ● High (>20%)

- Small (annual client revenue <US\$5 billion)
- Midsize (annual client revenue US\$5-15 billion)
- Large (annual client revenue >US\$15 billion)

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Developments/Investments

[REPRESENTATIVE LIST] [ILLUSTRATIVE] [NOT EXHAUSTIVE]

Recent developments/investments

Nature of investment	Year	Details
Technology	2024	Launched IBM Consulting Advantage, an AI-enabled delivery platform that uses IBM and partner technologies to support solution delivery and scale consulting capabilities.
Partnership	2024	Partnered with Salesforce to offer pre-built AI agents and tools that clients can deploy within their own IT environments, allowing them to use their data while maintaining control over their systems.
Partnership	2024	Partnered with WPP to launch a B2B solution powered by IBM watsonx data and AI platform, aimed at solving complex B2B marketing challenges.
Partnership	2024	Expanded its partnership with Adobe, integrating watsonx into the Adobe experience platform.
Partnership	2023	IBM Consulting expanded its partnership with Adobe and introduced consulting services focused on using AI tools such as Adobe Sensei Gen AI and Adobe Firefly to support content supply chain processes.
Partnership	2023	IBM signed a partnership agreement with Salesforce to deliver marketing operations using a BPaaS model. As part of the agreement, IBM manages the purchase, ownership, and operation of Salesforce Marketing Cloud licenses and platforms on behalf of customers.

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Case studies

CASE STUDY 1

Delivered holistic, end-to-end managed marketing services through transformation

Business challenge

The client faced the challenge of transforming its global marketing operations to align with its business vision. It required a central partner to efficiently manage marketing activities across various local markets, while ensuring seamless coordination with its global team.

Solution and impact

The client leveraged IBM's extensive expertise in Salesforce marketing cloud and global delivery capabilities to deliver a scalable and efficient solution. The solution allowed the client to handle a large volume of work with high accuracy and quality, resulting in a 10% decrease in operational cost and expanded to more than 40 markets, over the past three years.

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

CASE STUDY 2

Enhanced marketing effectiveness and efficiency through innovation, automation, and operations

Business challenge

The client wanted to scale solutions and integrate services to support the full cycle of marketing campaign management, execution, and operations, along with maintaining compliance in regulatory and operational communications.

Solution and impact

The client engaged with IBM and leveraged platforms such as Adobe, Acoustic, and Salesforce Marketing Cloud to optimize marketing processes and improve performance. Together, it was able to save 45% of time through process redesign work for email workflow and to increase speed-to-market by more than 50%.

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Engagements

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Key marketing services engagements

Client name	Process served	Region	Client since
A global consumer packaged goods provider	Customer, content, campaign, marketing support, and data and analytics	Global	2024
A global consumer product manufacturer	Customer, content, campaign, marketing support, and data and analytics	Global	2024
A global automotive manufacturer	Content	Global	2024
A global travel and hospitality provider	Customer, content, campaign, marketing support, and data and analytics	Global	2023
A large national automotive retailer	Customer, content, campaign, marketing support, and data and analytics	United States	2022

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Capabilities

[REPRESENTATIVE LIST] [ILLUSTRATIVE] [NOT EXHAUSTIVE]

Proprietary technology solutions

Solution name	Process served	Year launched	Details
IBM Consulting Advantage	Customer, content, campaign, marketing support, and data, analytics, and reporting	2024	It is an AI-enabled delivery platform that integrates IBM and partner technologies to support consulting work through advanced software tools and methodologies. It features agents and applications for scalable solution delivery and faster value realization.
IBM Marketing Creative Assistant	Content, campaign, and marketing support	2024	Creative Assistant, built on IBM watsonx, is an AI tool that streamlines the creation of brand-aligned marketing content, by generating AI-driven outputs based on vetted product information, with customization options for client-specific use; it also enables democratization of content production and localization across broader teams.
IBM Digital Knowledge Vault	Customer, content, campaign, and marketing support	2024	It is a model that promotes partnership and collaboration to capture, refine, and retain knowledge and documentation, acknowledging global and local nuances. IBM's digital tools will ensure continuous access to training and knowledge resources throughout the knowledge journey.
IBM iX Experience Orchestrator (EXO)	Marketing support and data	2024	It is a proven, open-source framework of components and pre-built connectors that accelerates time-to-value by developing and releasing new functionalities across marketing and commerce applications.
IBM watsonx	Customer, content, campaign, marketing support, and data, analytics, and reporting	2023	Watsonx is an AI and data platform comprising three core components – watsonx.ai for training and managing models, watsonx.data for centralized data management, and watsonx.governance for ensuring model oversight and integrity.

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Capabilities

[REPRESENTATIVE LIST] [ILLUSTRATIVE] [NOT EXHAUSTIVE]

Partnerships

Partner name	Process served	Year	Details
Adobe	Customer, content, campaign, marketing support, media channels, and data, analytics, and reporting	Pre-2000	It partnered with Adobe to integrate Adobe Experience Cloud, including Workfront and Firefly AI, to support the faster creation and delivery of personalized assets for customer experience and marketing efforts. GenStudio for performance marketing was used to produce content at scale, with embedded analytics for content optimization.
Salesforce	Customer, content, campaign, marketing support, media channels, and data, analytics, and reporting	Pre-2000	It partnered with Salesforce to design and implement Marketing Cloud solutions for joint clients. IBM applied its AI, automation, and industry expertise to improve marketing operations throughout the campaign life cycle.

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Industry event participation

[REPRESENTATIVE LIST] [ILLUSTRATIVE] [NOT EXHAUSTIVE]










Key events

Event name	Date of event	Type of event	Details
Adobe Summit	2024	Sponsor	Partnered with AWS and Adobe to publish a research report titled The Revolutionary Content Supply Chain, examining the role of generative AI in improving creativity and productivity in content workflows.
Cannes Festival of Creativity	2024	Speaker	IBM and WPP launched a B2B solution powered by IBM watsonx to help marketers identify and engage clients and prospects throughout the buying journey.
Gartner Marketing Symposium	2024	Speaker	Delivered a session titled The AI-Powered Content Supply Chain – Generating Content You Can Trust and hosted a follow-up roundtable, Trust What You Create , focused on content integrity and reliability.
Salesforce Dreamforce	2024	Sponsor	It was a lead sponsor at the event, showcasing marketing use cases at its booth and hospitality suite. MOL Group joined IBM on stage to share business outcomes achieved using custom marketing solutions powered by data cloud and AI.
Adobe Summit	2023	Sponsor	Expanded its partnership with Adobe to deliver content supply chain solutions using generative AI.
Cannes Festival of Creativity	2023	Speaker	Announced a collaboration with will.i.am and Focus Your Ideas (FYI) to explore the use of secure and trustworthy generative AI in creative work.
Salesforce Connections	2023	Sponsor	Sponsored the event, showcased its data hygiene tools, and co-presented with TIAA to highlight the value of Genie/CDP (now Data Cloud).

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Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- IBM offers a wide range of marketing services including customer segmentation, content management, and campaign operations and execution; its BPO capabilities complemented with strategy, consulting, and digital transformation expertise of IBM IX enable it to provide services across the marketing services value chain
- It has a strong suite of proprietary solutions including IBM Watson Advertising Accelerator, offering dynamic creative optimization; IBM Watson Advertising Weather Targeting, offering campaign performance improvement; IBM Watson Advertising Predictive Audiences, offering first-party data-based audience segmentation; and IBM Cognos Analytics offering data visualization
- Additionally, the IBM Consulting Marketing Workbench platform offers gen AI-powered content, persona, journey creation, and real-time insight generation
- It has a robust suite of commercial-of-the-shelf tools enhancing its marketing services. This includes Marketing Hub, DaVinci, Bynder, Storyblok, Microsoft Fabric, Salesforce CRM, and Canva
- It has a balanced delivery mix with over 50% of its FTEs based out of offshore locations to provide cost arbitrage to its clients, along with 50+ global design studios enabling it to provide localized support to its clients
- Buyers laud IBM for its domain expertise and relationship management

Limitations

- IBM's scale of resources supporting media channels is comparatively limited and may hinder its ability to effectively serve clients looking for end-to-end solutions
- IBM presents opportunities to expand its portfolio mix across geographies such as the UKI, APAC, ANZ, and LATAM regions; industries such as e-commerce, CPG, technology, travel, telecom and media; and buyer segments such as small and mid-sized enterprises
- Buyers highlight proactiveness, innovation, and greater collaboration as some areas of improvements for IBM

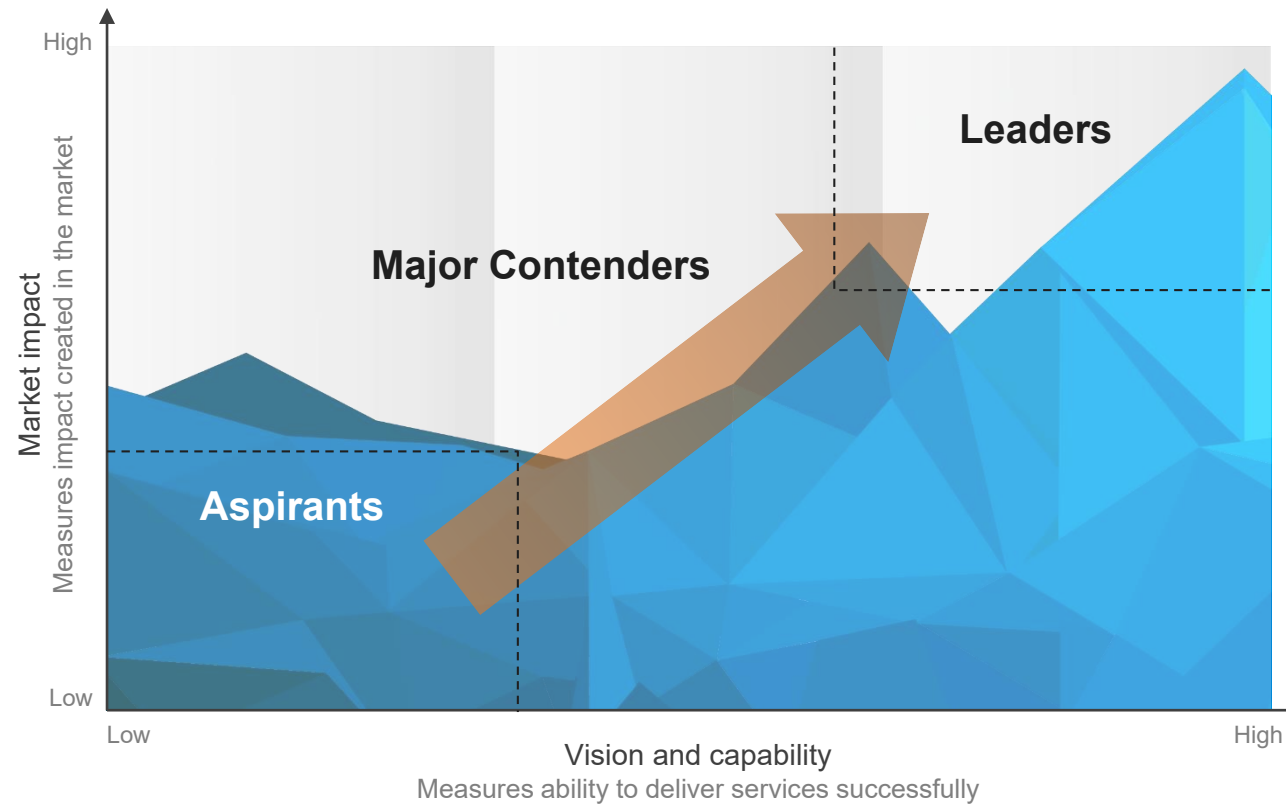
Appendix

PEAK Matrix® framework

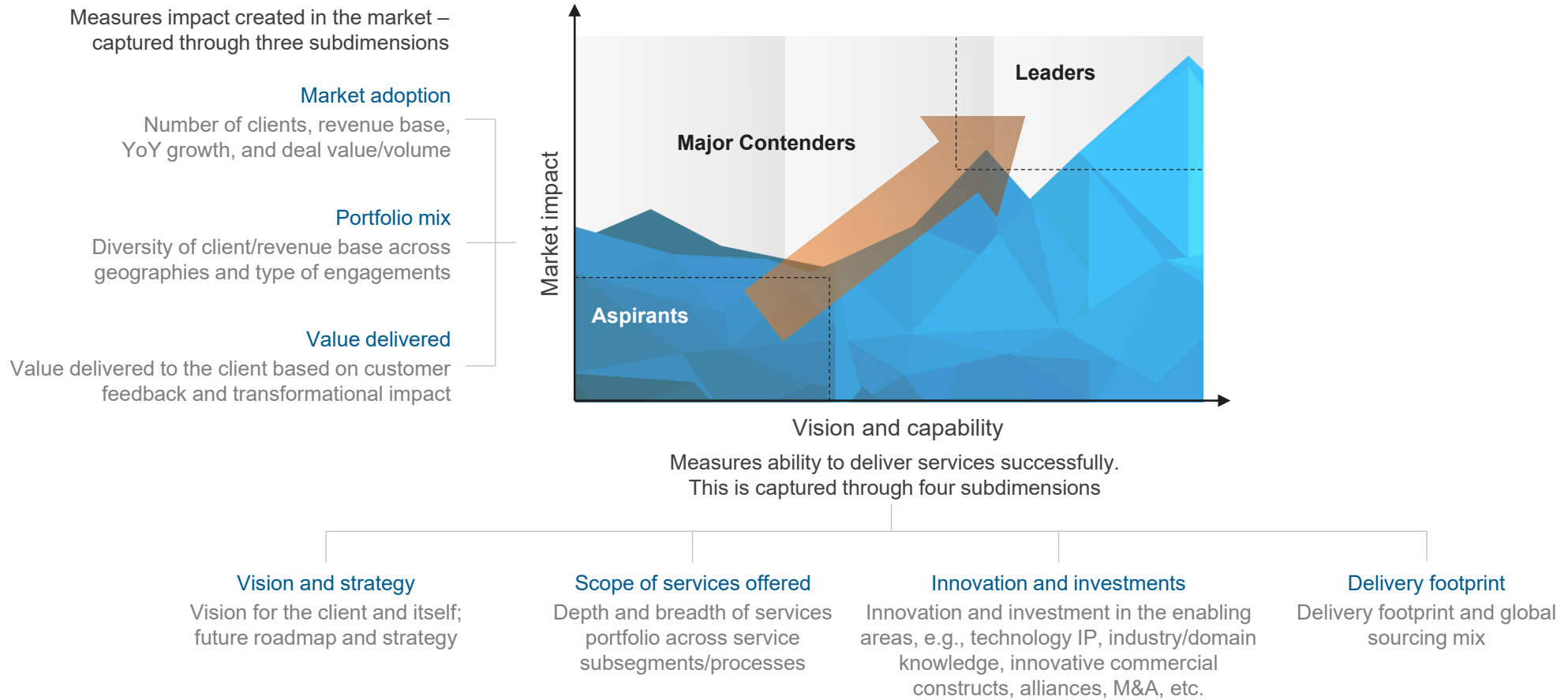
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



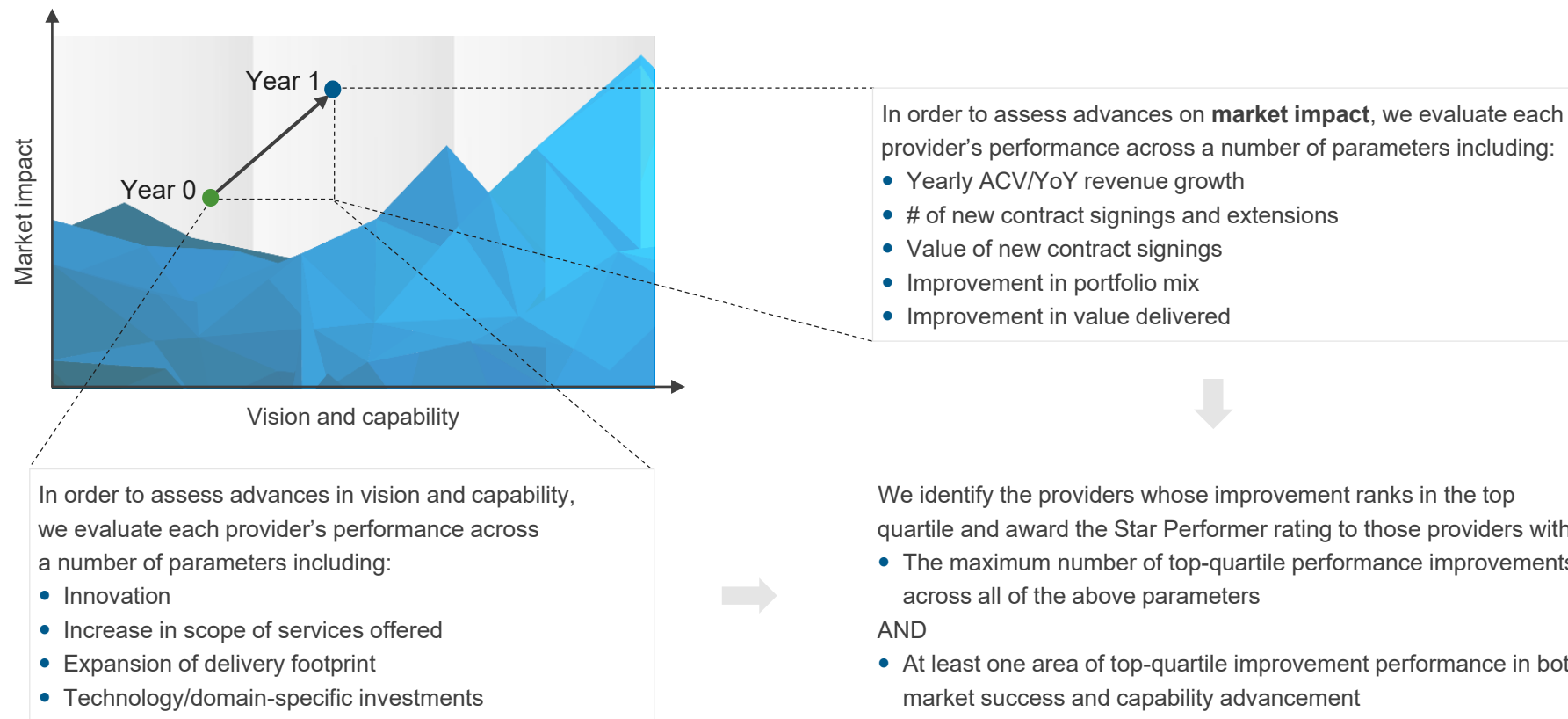
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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