



Software Testing Services: Advanced Automation

Market Analysis
Abstract

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Who Is This Report For?

NelsonHall's "Software Testing Services: Advanced Automation" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within software testing services/Quality Assurance
- Vendor marketing, sales and business managers developing strategies to target software testing service opportunities
- Financial analysts and investors specializing in the IT services sector.

Scope of the Report

The report analyzes the worldwide market for software testing services/QA, looking advanced automation, i.e.:

- Continuous testing, i.e., testing in the context of agile methodologies and using DevOps tools
- AI use cases for automating test execution
- RPA tools for automating test activities
- UX testing, across usability, accessibility, and technical and non-technical content
- Testing AI systems, and RPA workflows/business process automation.

It addresses the following questions:

- What is the current and future market for software testing services?
- What are the client segments for software testing services, and their characteristics? What are the drivers, benefits, and inhibitors for each segment?
- What is the size and growth of the software testing services markets by client segment, geography, service line (including digital testing services, and crowdtesting), activity and sector?
- How did spending grow in 2019 and how will it increase in 2020 and onward?
- How is the market organized? Who are the main vendors? How can they be assessed and compared? What are vendor challenges and critical success factors by market segment?
- What are the advanced automation service offerings in the market? Which one has highest growth potential?
- Has continuous testing reached maturity or is there still room for innovation?
- How will UX testing evolve and what how will sub-offerings evolve?
- How is AI shaping the testing market?
- What is the potential for growth for RPA in testing services?



Key Findings & Highlights

The global testing services market has significantly changed in the past few years. After several years of high growth, the managed testing services opportunity has slowed down considerably.

Clients turned their attention to adapting their testing operations to the world of agile methodologies and DevOps tools. They invested in continuous testing and increasing their level of automation, while reskilling their QA workforce.

COVID-19 did not change the underlying trends in the QA market. Continuous testing and automation remain the priority of clients. However, in sectors heavily impacted by the pandemic's consequences (e.g., travel ban), clients froze their spending or reduced it significantly, in their fight for survival or return to profitability.

NelsonHall is basing its forecast on the prediction of the IMF, as the testing market has become a cyclical market. NelsonHall expects a sharp decline (-5%) in 2020 in testing services spending, followed by a moderate rebound in 2021 (+2%) as clients reconsider their expenses with the economic recession. Spending will reach \$38bn in 2024, representing a +2% CAGR 2019-2024

Contents

1. Changing Shape of the Software Testing Services Market
 2. Customer Requirements
 3. Market Size and Growth
 4. Vendor Market Shares
 5. Delivery Trends and Vendor Delivery Capabilities
 6. Vendor Offerings and Targeting
 7. Vendor Challenges and Success Factors
- Appendix 1: Definition of UX Testing
- Appendix 2: Vendors Researched for Analysis

Report Length

82 slides, consisting of seven chapters.

Vendors Researched

Amdocs, Capgemini, Cigniti, DXC, EPAM, Expleo, Hexaware, Infostretch, Infosys, L&T Infotech/LTI, NTT DATA, QualiTest, TCS, Tech Mahindra, TestingXperts, and Virtusa.

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