



UX-UI Services

Market Analysis
Abstract

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By David McIntire
IT Services
Research Director
NelsonHall

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research.nelson-hall.com





Who Is This Report For?

NelsonHall's "UX-UI Services" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the use of vendors for UX-UI Services
- Operational decision makers exploring the benefits and inhibitors of undergoing UX-UI initiatives
- Vendor marketing, sales and business managers developing strategies to target UX-UI opportunities
- Financial analysts and investors specializing in the IT services sector, including UX-UI Services.

Scope of the Report

This report analyzes the market for UX-UI Services. It addresses the following questions:

- What is the current and future market for UX-UI Services?
- What are the customer requirements UX-UI Services?
- What are the benefits/results which vendors have been able to achieve for their clients?
- What UX-UI Services are organizations buying from IT services vendors?
- What is the size and growth of the UX-UI Services market?
- Who are the leading vendors within UX-UI Services?
- What are the vendor selection criteria, challenges, and critical success factors for vendors targeting UX-UI Services?

Key Findings & Highlights

NelsonHall's market analysis of UX-UI Services consists of 49 pages (plus detailed appendices).

While digital transformation consulting services are expected to grow by ~13.9% CAAGR through 2022, NelsonHall expects UX-UI services to grow slightly faster at ~15.4%. This is driven by the increasing recognition of the importance of experience in digital transformation, including the rising use of UX-UI consulting to address internal system transformation and internal end to end service design.

Facing disruption from new digital competitors and evolving customer and employee expectations, IT service vendors are placing significant emphasis on building UX-UI capabilities as a differentiating asset. Frequently, vendors are acquiring to quickly add capabilities rather than building organically; 63% of IT service vendors analyzed had an acquired design company to build UX-UI skills.

IT service vendors are also investing in locations to deliver these services from, with 75% of vendors having built at least one dedicated design studio location from which it can deliver design thinking and collaborative design sessions with clients.

In parallel the primary focus of UX/UI services has evolved. Historically, it has been on external-facing digital properties such as e-commerce sites, customer portals and partner portals. Over the course of 2017 and 2018, this shifted as more companies looked to transform internal systems with a goal of increasing productivity, employee satisfaction, and employee retention. Going forward this will continue to shift with internal facing initiatives representing an increasing proportion of the UX/UI work. By 2020, NelsonHall expects an equal focus on internal and external as external programs are re-evaluated to incorporate new and emerging technologies such as voice and AI.

Historically, experience has been a relatively intangible quality. While companies capture customer and employee satisfaction, a direct quantifiable benefit may not be captured. To aid clients in this, vendors are increasingly focusing on defining quantifiable business cases from the on-set of new UX/UI consulting services engagements

As the scope of UX/UI services engagements has broadened, vendors have also had to broaden the KPIs and metrics used to measure an engagement's success. As the scope of engagements increases to include overall service design, metrics will also evolve to include broader business metrics such as fulfillment time.

To deliver these services, IT service vendors are investing in both new offerings and expanding delivery capabilities. These investments are primarily focused in three main areas:

- Building new offerings incorporating emerging technologies such as conversational and voice UI, AR/VR and AI
- Expanding the breadth of capabilities and maturing and growing existing delivery team skills
- Opening new design studio locations.



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Report Length

49 pages

Report Author

David McIntire

david.mcintire@nelson-hall.com

Sales Contact

Guy Saunders

guy.saunders@nelson-hall.com