LÜNENDONK

Lünendonk® Survey 2026

The Market for Digital Experience Services in Germany

From silos to integrated customer journey management

A survey by Lünendonk & Hossenfelder GmbH in collaboration with

CONCLUSION

REPLY

PLAN.NET HOUSE OF COMMUNICATION

Valtech

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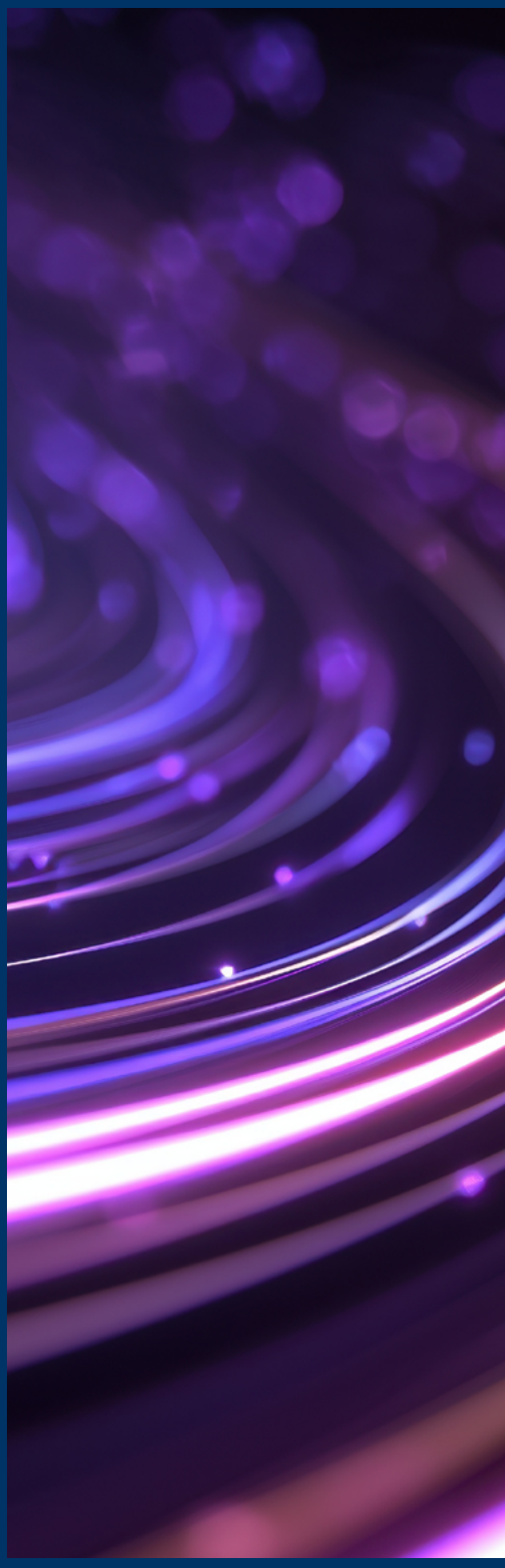
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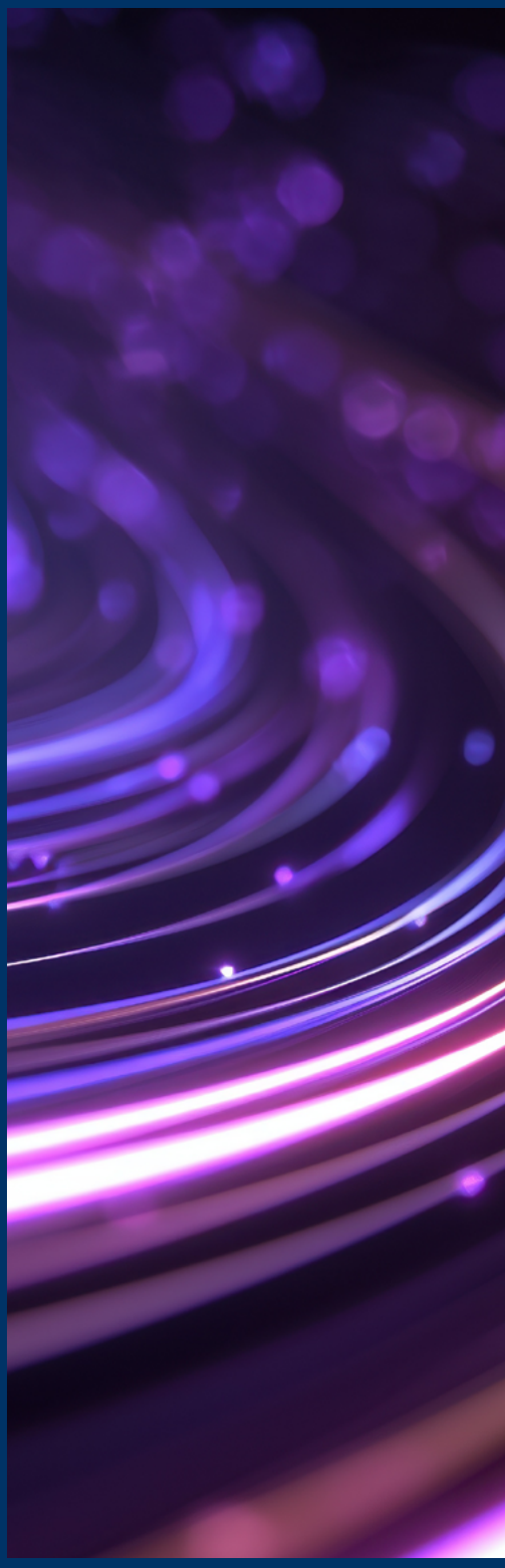
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Foreword

Mario Zillmann
Senior Partner

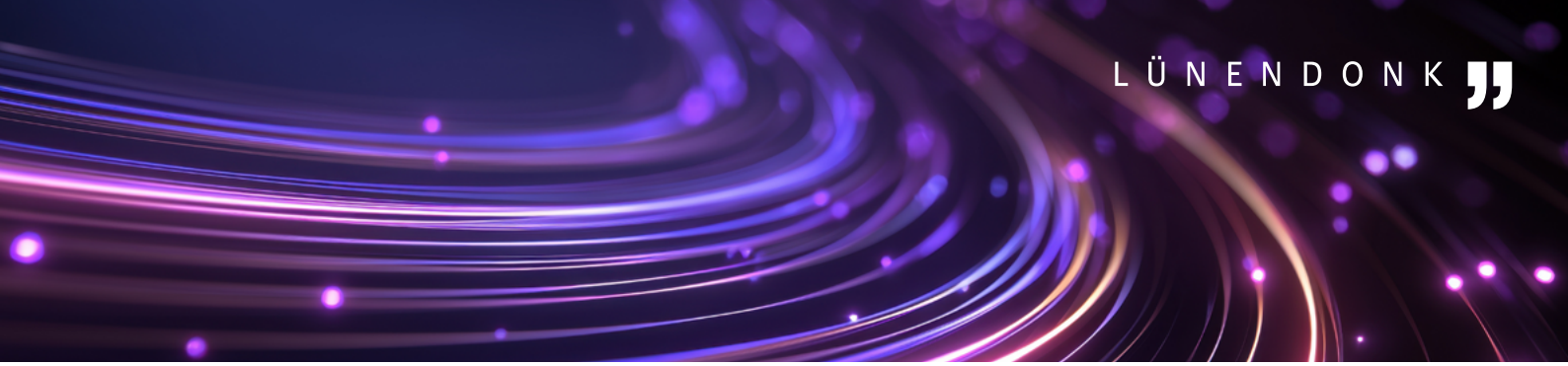
Dear readers,

79 per cent of user companies surveyed by Lünendonk intend to increase their spending on digital experience over the next two years. At the same time, artificial intelligence is fundamentally changing the way digital customer experiences are planned, produced and managed. For marketing managers, this does not simply mean a larger budget for additional campaigns or new digital channels. They must deliver personalised content and relevant interactions more quickly, coordinate customer journeys across multiple touchpoints, and demonstrate marketing's contribution to business results.

The services required to achieve this are also changing. AI is increasingly automating standardisable tasks in content creation, campaign management and data analysis. At the same time, there is a growing need for strategic management, reliable customer data, technological integration and clear guidelines for the use of AI. Marketing is not becoming any less important as a result, but it is becoming more technology-driven, data-driven and more closely integrated with IT, sales and customer service.

This development is taking place against a backdrop of a challenging economic environment. Companies must balance investments in digital experience with efficiency requirements, regulatory requirements and the rising expectations of their customers. Many digital applications, which have been rolled out at a rapid pace in recent years, now need to be further developed, integrated and professionally operated. At the same time, digital search is changing. Content and services must no longer simply be visible in traditional search engines, but must also be presented in a way that is comprehensible, structured and trustworthy for AI-powered answer and recommendation systems.

This also shifts the demands placed on service providers. Standardisable and repeatable services can increasingly be automated. The value contribution of digital agencies and other DXS service providers will therefore be measured more strongly in future by their ability to combine strategy, creation, data, technology and operations in form an integrated service model. The service provider is increasingly becoming an integrator and orchestrator of AI-supported customer journeys. 73 per cent of the companies surveyed already procure digital experience services frequently or always via their IT procurement department. This shows that digital experience projects are becoming more technology- and integration-driven initiatives.



This Lünendonk® Survey for 2026, entitled 'The Market for Digital Experience Services in Germany – From Silos to Integrated Customer Journey Management', examines this development from the perspective of 23 DXS service providers and 140 client companies. It reveals which technologies and investments are shaping the market, how collaboration between clients and service providers is changing, and what opportunities and challenges this presents for providers.

The survey is available free of charge thanks to the support of the digital experience services providers Conclusion, Plan.Net Group, Reply and Valtech. We would like to express our sincere thanks for their contribution to the content and their support.

I would also like to thank all the companies that took part in the survey and thereby contributed to a nuanced picture of the market.

Kind regards

Mario Zillmann
Senior Partner

Management Summary

79 %

of the companies surveyed plan to increase their spending on digital experience over the next two years.



DX service providers: Average revenue growth in the DXS sector in 2025:

2.0 %



20 %

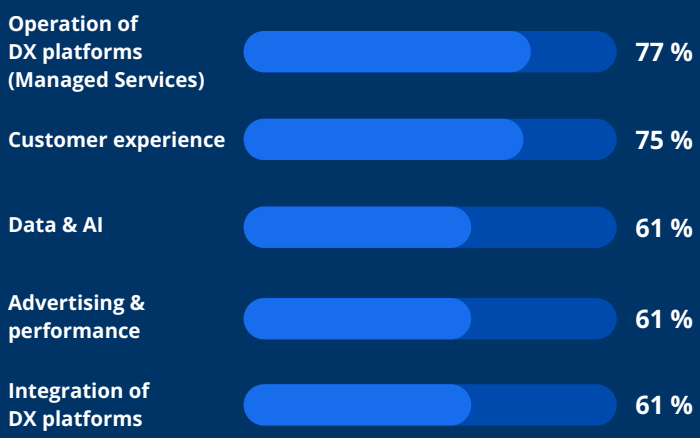
of the companies surveyed are feeling the impact of changes in search behaviour driven by AI systems on their marketing and sales strategies.



Only 7 %

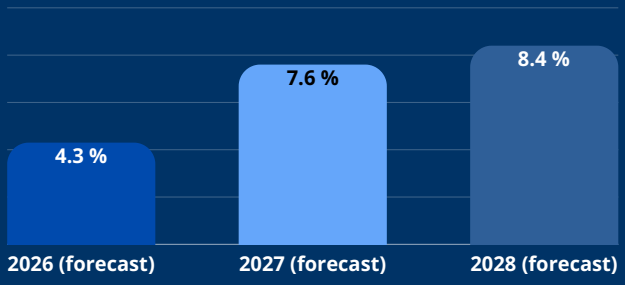
have so far actively implemented a GEO strategy.

Investment themes

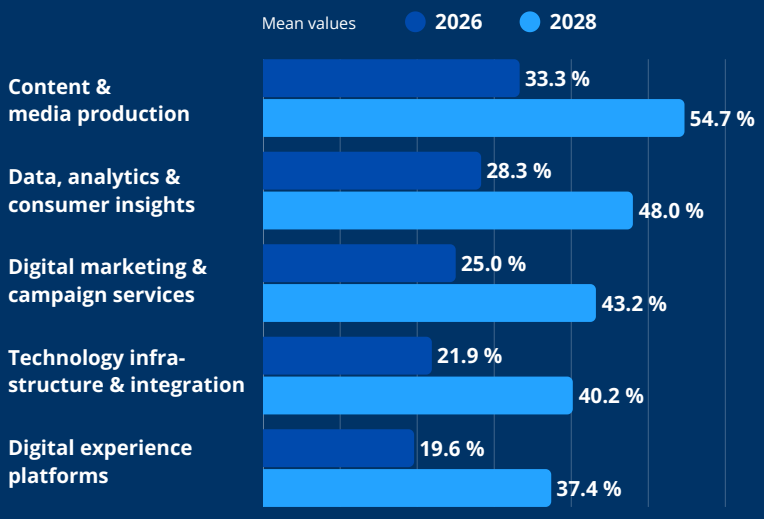


Figures as percentage of respondents who rated the respective topic as 'somewhat high levels of investment' and 'very high levels of investment'; scale from 1 = 'no investment' to 4 = 'very high levels of investment'.

Forecasts by DX service providers regarding revenue developments



Proportion of AI delivery in service provision



Methodology and survey sample

Lünendonk has been analysing selected B2B service markets since 1983, with a focus on Germany and German-speaking countries. Our market observations began with the IT services market. Over the years, further market segments have been added, including management consultancy, auditing and tax consultancy, temporary staffing and facility services. The key market developments and the leading providers in the respective segments are presented in the Lünendonk® Surveys and lists.

Lünendonk has been monitoring the digital experience services (DXS) market segment since 2017. In 2020, the series of surveys was expanded to include a Lünendonk list and a Lünendonk portfolio. The list identifies the leading DXS service providers in Germany, whilst the Lünendonk portfolio analyses and visualises market strength as well as the breadth and depth of the various service offerings.

About the service provider survey

For this year's edition of the survey, 54 digital agencies, IT service providers and management consultancies were identified through a pre-selection process, contacted and invited to take part. This pre-selection does not mean that these service providers also meet the criteria for inclusion in the Lünendonk® Survey, but merely that Lünendonk recognises them in the market. 23 service providers contributed to the survey by completing the questionnaire – including, with a few exceptions, all relevant service providers that also meet the inclusion criteria.

As this survey involves not only a ranking by revenue but also a qualitative assessment of service providers based on their DX expertise and market strength, Lünendonk can only consider service providers who have submitted a questionnaire containing self-reported information on their portfolio and other relevant key figures.

Inclusion in the Lünendonk® Survey is subject to a set of transparent criteria (see Figure 1). The selection and survey process took place in three stages.

1. Firstly, Lünendonk identified those providers that generally offer a portfolio in the field of digital experience services (DXS). The three service areas of Consulting Services, Agency Services and Technology Services were taken into account.

2. Lünendonk then contacted the identified companies in writing and invited them to take part in the survey. The questionnaire was completed between May and July 2026. The number of participating service providers – adjusted for takeovers and for companies that no longer focus on digital experience services due to changes in their service portfolio – has remained relatively constant for several years.
3. In the third phase, Lünendonk carried out a comprehensive check of the data collected to ensure its plausibility and validity. Where necessary, supplementary background interviews were conducted with the survey participants. Only service providers who submitted the questionnaire and met the specified inclusion criteria were included in the survey.

The survey considered both service providers headquartered in Germany and the German subsidiaries of international providers. To be categorised as a service provider in the digital experience services segment and to be eligible for inclusion in the Lünendonk® List, service providers must meet the following criteria:

1. The companies must generate at least 60 per cent of their revenue from management and IT consultancy, digital agency services, software development and implementation, or system integration.
2. In terms of revenue from digital experience services, significant revenue must be generated in each of the three segments (Digital Consulting Services, Digital Agency Services and Digital Technology Services).
3. Service providers whose DXS revenue accounts for between 30 and 50 per cent of their domestic revenue must generate at least 100 million euros from digital experience services in Germany. Service providers with a share of less than 30 per cent must generate at least 200 million euros from DX services in Germany.

Inclusion criteria for the Lünendonk List 'Leading providers of digital experience services'

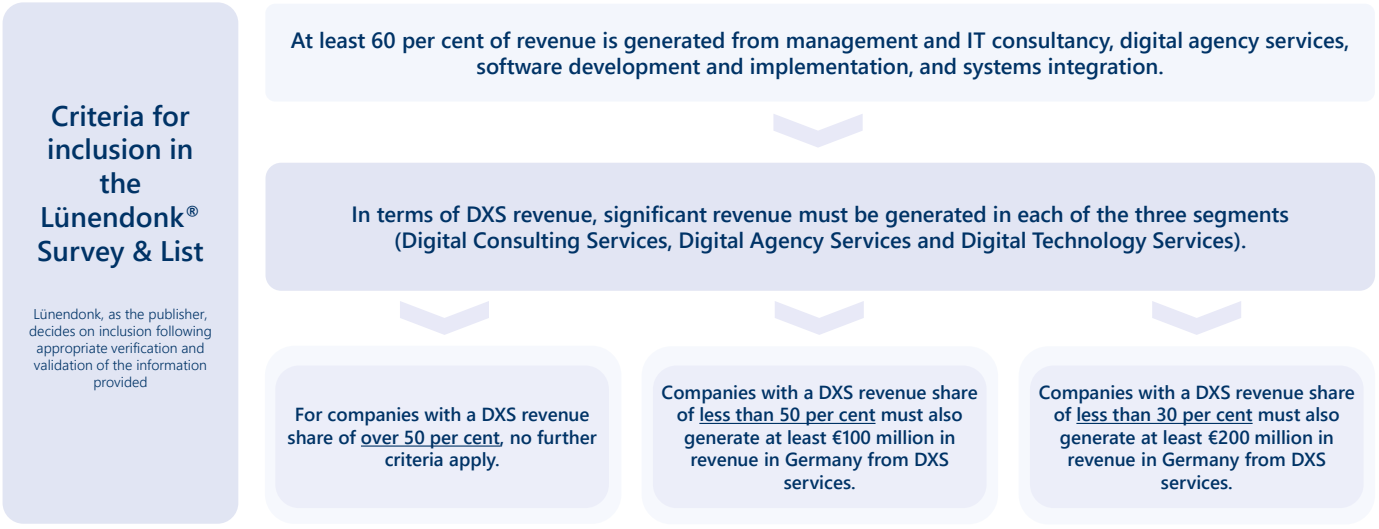


Fig. 1: Inclusion criteria for the Lünendonk Survey & List

Verification of whether these criteria are met is based on the completed questionnaires, corresponding plausibility checks carried out by Lünendonk and, in selected cases, detailed background interviews, including the submission of skills breakdowns and references. Companies that took part in the survey but were unable to meet the criteria were therefore not included in the study. Individual responses from these companies are nevertheless taken into account for the study, meaning that for some questions the sample size (n) is higher than the number of companies included in the survey.

The leading providers – measured by domestic revenue – are listed in the Lünendonk® List. No ranking based on DXS segment revenue is provided, as – particularly in the case of hybrid service providers – does not validate the exact segment revenue figures for digital experience services from public sources, and in some cases these cannot be clearly distinguished even by the service providers themselves due to difficulties in delineation. A valid comparison would therefore not be possible.

As the Lünendonk® List aims to be comprehensive and accurate, companies that have not completed a questionnaire but which, in Lünendonk's view, nevertheless meet the criteria and are of the required size are estimated and marked accordingly in the list as estimates. However, this is subject to there being evidence of current business performance in publicly available sources.

Although Lünendonk generally regards service providers such as Publicis Sapient and Dept as relevant providers of digital experience services, neither company participates in this market survey. As there is also no valid and up-to-date information on business performance in Germany available from public sources, Lünendonk refrains from making an estimate in both cases due to a lack of reliable data.

About the user survey

To complement the service providers' perspective with that of client companies, a total of 140 client companies were surveyed by telephone in July and August 2026. The companies come from the industrial and automotive sectors, retail, the consumer goods industry, the financial sector, the chemical and pharmaceutical industries, telecommunications and the energy sector.

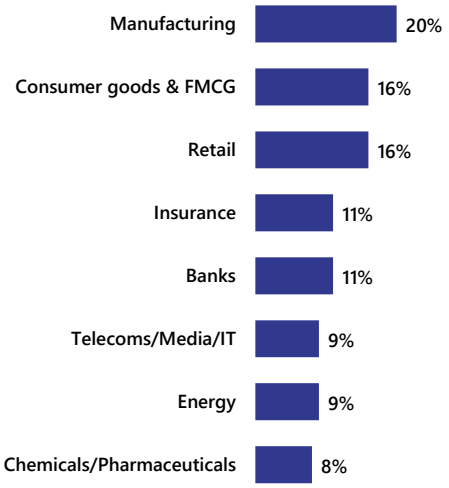
Just under half of the companies follow a B2C business model, whilst around a third operate in the B2B sector. The remaining companies serve both B2C and B2B markets. 70 per cent of respondents are based in Germany, 19 per cent in Switzerland and 11 per cent in Austria. Half of the companies generate revenue of up to 1 billion euros, whilst the other half generate higher revenue.

The survey included IT, marketing, sales and service managers, as well as a few contacts from the strategy, commerce and experience departments. Relevant differences between B2C and B2B companies are highlighted separately when interpreting the results.

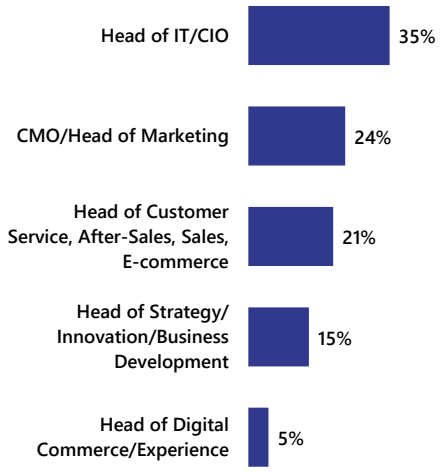
The composition of the sample is based on the previous edition of the survey in terms of key company characteristics. However, as the participant groups only partially overlap, changes between the years of the studies cannot be unequivocally attributed to market developments. The survey is not representative; however, due to the comparable sample composition and the repeated collection of key characteristics, it enables the identification of overarching trends in the DXS market.

Sample of the user companies surveyed

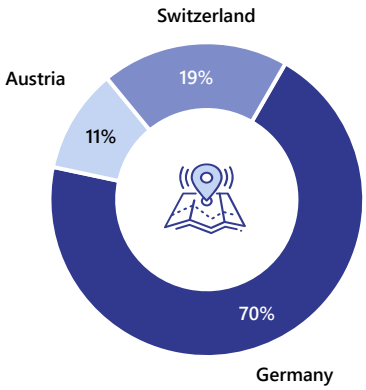
Industry distribution



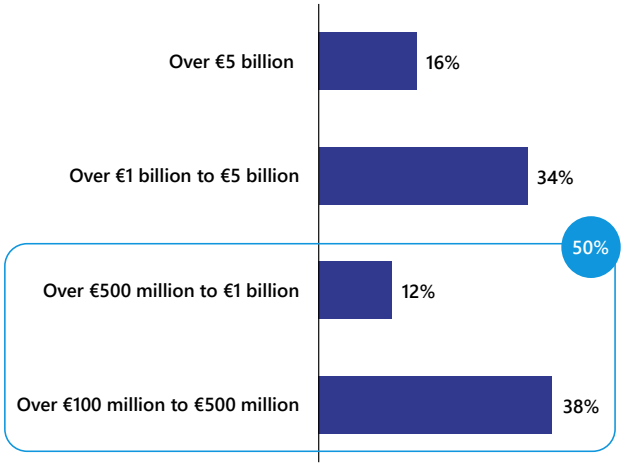
Function



Geographical distribution



Revenue distribution



Business model

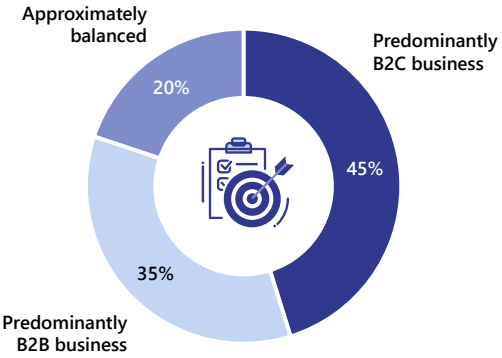


Fig. 2: Industry distribution; function; geographical distribution; revenue; business model; all companies; n = 140

List of participants of DXS service providers

In addition to the 23 companies listed in Figure 3, there are other service providers operating in the German DXS market; however, as already mentioned in the methodology section, these either did not submit a questionnaire to participate, a valid assessment would not be possible without further information, or they narrowly failed to meet the participation criteria. These include, in particular, Cognizant, Dept, EPAM, Intive, Nexum, Publicis Sapient and TWT.

23 participating companies that met the participation criteria

Company	Head office	Revenue in 2025 (in € million) in Germany	Service provider category
]init[AG für digitale Kommunikation 1)	Berlin	214.8	Specialist
Accenture Holding B.V. & Co. KG, Kronberg *) 1) 2)	Kronberg	3,600.0	Generalist
adesso SE	Dortmund	1,225.7	Generalist
Capgemini Deutschland GmbH *) 2)	Berlin	2,240.0	Generalist
Conclusion DACH GmbH	Munich	101.3	Specialist
Deloitte GmbH 3)	Munich	1,583.0	Generalist
Deutsche Telekom MMS GmbH	Dresden	257.0	Specialist
Diconium Group GmbH	Stuttgart	176.0	Specialist
Digitas GmbH	Hamburg	54.5	Specialist
Exxeta AG	Karlsruhe	133.0	Specialist
IBM Deutschland GmbH *) 2)	Ehningen	2,220.0	Generalist
Infosys Limited *)	Frankfurt am Main	1,300.0	Generalist
MAI Marketing Automation Intelligence GmbH	Hamburg	29.2	Specialist
Merkle Germany GmbH 4)	Frankfurt am Main	36.9	Specialist
msg systems ag	Ismaning	973.7	Generalist
Plan.Net Germany GmbH & Co. KG 4)	Munich	258.8	Specialist
port-neo Group GmbH	Stuttgart	10.7	Specialist
PwC GmbH 3)	Frankfurt am Main	1,575.0	Generalist
Reply Deutschland SE *)	Gütersloh	475.0	Generalist
Syzygy AG	Bad Homburg	46.1	Specialist
team neusta SE 1) 5)	Bremen	76.2	Specialist
valantic GmbH 1) 6)	Munich	360.1	Generalist
Valtech GmbH	Düsseldorf	84.6	Specialist

*) Revenue figures and shares are partly estimated.
1) Figures for 2025 include acquisitions.
2) Revenue figures also include revenue from management consultancy.
3) Figures relate to the advisory business.
4) Revenue represents fee-based revenue.
5) Figures for 2025 include disposals.
6) Difference compared to the 2026 Lünendonk Survey 'The Market for IT Services in Germany' due to the reporting of provisional figures.

Fig. 3: Alphabetical list of participants

The market for digital experience services in Germany

From silos, through the integrated experience, to the AI-orchestrated customer journey

Lünendonk has been analysing the market for digital experience services (DXS) since 2017. Since then, external factors such as the COVID-19 pandemic and technological developments such as cloud computing and artificial intelligence have significantly expanded the possibilities for engaging with and supporting customers throughout their entire customer journey: from the digitalisation of individual marketing and sales channels, through the expansion of digital commerce, to an integrated and increasingly AI-supported customer experience.

Digital experience has long since ceased to be created only through individual campaigns, individual channels, websites or individual digital front-ends. What is crucial is the interplay between business applications, data, channels, platforms and IT operations. Stability, availability, security and the protection of digital identities shape the customer experience just as much as design and functionality.

With the spread of generative and agent-based AI, digital interaction is now also changing. AI supports content creation, generates media assets, analyses customer data, segments customer groups and thereby enables significantly greater personalisation of offers and the automated management of campaigns and customer experiences. At the same time, we are currently witnessing the beginning of changes in customers' search behaviour driven by generative models – that is, how information is sought, offers are evaluated and, overall, purchasing decisions are made. In the medium to long term, the search for information and, increasingly, the purchasing process are shifting away from traditional search engines and digital channels towards generative response and assistance systems, and marketing and sales managers must find rapid responses to these developments. However, the final chapter of this survey makes it clear that only around one in five companies is already addressing this fundamental shift.

The AI transformation, particularly in marketing, does not, however, mean that traditional online marketing tools are losing their significance. Rather, it is changing the requirements for their design. Companies must structure content and services in such a way that they are understandable, discoverable and reliable for both humans and AI-powered systems. To achieve this, they need structured content, robust data and clear rules for use by AI systems.

Digital experience bridges long-separated customer domains and requires integrated consultancy, agency and IT expertise

For the purposes of analysing external service providers (DX service providers), Lünendonk uses the term 'digital experience services' to encompass the intersection of management consultancy, IT consultancy and system integration, as well as digital agency services, insofar as these are geared towards the implementation of customer-centric digitalisation and AI strategies. The analysis focuses on service providers with extensive expertise and resources in the areas of digital consulting services, digital agency services and digital technology services. These include traditional digital agencies as well as consultancy and IT service providers.

Digital experience services – an interdisciplinary approach combining consulting, agency and technology services

Digital Consulting Services

- **Business Consulting:** Strategy development, business model innovation, organisational development, change management within the context of DX initiatives
- **Creative and CX Consulting**: CX Design & Management, Service & Product Innovation, Design Thinking, Ideation & Requirements Engineering
- **Marketing Consulting:** Marketing ROI Development and Planning, Research & Market Analysis, Development of Data-Driven Marketing Strategies
- **Data & AI Consulting:** Business and IT Architecture Development, Data & AI Strategy, Data Management, Data Privacy & Regulatory Compliance

Digital Technology Services

- **Business Model Execution:** Support with the introduction of digital business models and the implementation of customer-centric strategies
- **Technical implementation**, **implementation** and **hosting/managed services** particularly for:
  - Digital commerce platforms/digital experience platforms
  - Marketing technologies: marketing automation platforms, customer data platforms, CRM, content technologies
  - Data technologies
  - Customer journey integration and service orchestration

Digital Agency Services

- **Usability Services:** UX/UI, Usability & Design Testing, Conversational UI/Chatbot UX
- **Visual Services:** (3D) Motion Graphics, Animation, CGI, Visual Effects, Virtual Sales Assistants
- **Communication & Content Services:** Content Creation, Campaign Management & Orchestration, Marketing Automation
- **Advertising & Performance Services:** Programmatic & Marketplace Advertising, Performance & Analytics, Affiliate Marketing, Conversion Rate Optimization
- **Media Services:** Media Strategy, Media Planning & Buying, Influencer Media

Fig. 4: Overview of the Digital experience services approach

To support companies with customer-centric strategies and their implementation, DXS service providers must cover a broad spectrum of services:

- **Discover & Define:** strategy consulting, customer journey mapping, identification and prioritisation of relevant AI and digital use cases, and definition of business value
- **Customer Data & Analytics:** Development of customer data platforms, data integration, identity resolution, advanced analytics and AI-based insights
- **Customer Engagement:** Design and implementation of personalised campaigns, marketing automation, omnichannel communication, experience design and AI-powered content creation
- **Platform & Architecture:** Selection, implementation and integration of digital experience platforms, API management, and the development of scalable and secure system architectures

- **Build & Integrate:** Development of bespoke applications, integration of ERP, CRM and SCM systems, implementation of microservices, and development and integration of AI applications and agent-based workflows
- **Run, Govern & Orchestrate:** Operation and further development of platforms; governance of data, processes and AI; cyber security; orchestration of the end-to-end customer journey; and continuous optimisation

The breadth of this service portfolio is a consequence of the increasing interdisciplinary nature of digital experience projects. Clients are increasingly requiring services that combine strategy, creation, data, technology and operations. This is not only changing service providers' portfolios; It also affects how customer-centric processes in marketing, sales and customer service are organised and managed within the client organisations.

Digital experience value chain

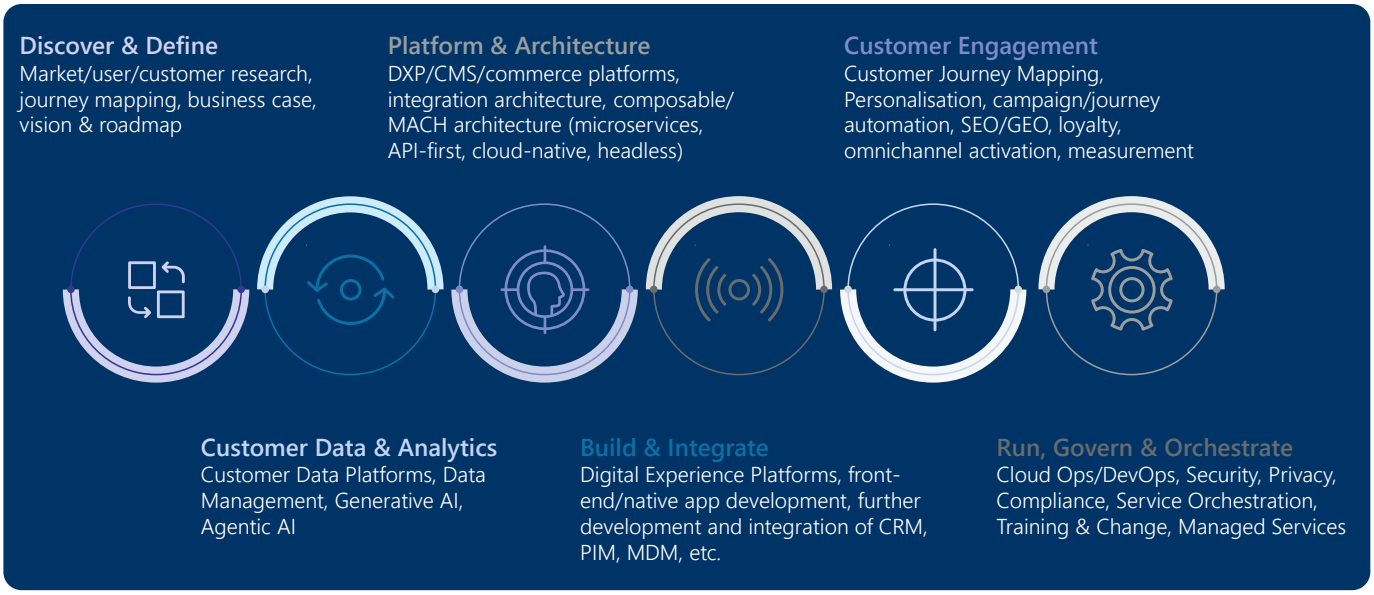


Fig. 5: Overview of the digital experience value chain

AI is changing the rules of digital interaction

Customers expect fast, consistent and intuitive responses throughout their information-gathering and purchasing decision-making processes. It is becoming increasingly irrelevant whether the interaction takes place via a website, a mobile app, social media, an online shop, a service channel or an AI assistant. The expectation remains the same: information, offers and services must be tailored to the specific context.

This is also changing the scope of digital experience services. The focus is no longer exclusively on individual websites, campaigns or applications. What is needed are integrated solutions that combine strategy, design, content, technology, data and IT operations, and integrate AI functions into these areas in a controlled manner.

From search to transaction: AI agents are becoming interaction partners

Generative and agent-based AI are transforming the customer journey – from search and customer advice through to interaction and transaction. Users can curate content, receive product recommendations or be offered suggestions for next steps. In certain use cases, AI agents also carry out tasks independently, accessing various systems and data sources to do so.

This places increasing demands on businesses to provide content and services in a way that is understandable, discoverable and reliable for both people and AI-powered search and assistance systems. Information must be structured, context-relevant and machine-readable. At the same time, businesses must ensure that their brand is consistently represented in AI-powered interactions and that the underlying information is robust.

In commerce, AI agents are evolving from assistants to key players in business processes. Their role extends beyond content creation: they can plan campaigns, buy media, address customers in a personalised manner, compare offers and initiate transactions. To do this, they require access to data and functions from various systems, as well as interoperable interfaces and common standards for communication between agents, platforms and applications. At the same time, companies must define which tasks agents are permitted to carry out independently and where human oversight remains necessary. Providers with their own data sets and integrated interfaces have a structural advantage in this regard. This could further concentrate value creation in digital marketing and retail on a small number of platforms.

A prerequisite for the automation of customer experiences is an integrated database with clear responsibilities and consistent data governance. Data, processes and systems must be interconnected in such a way that AI can deliver relevant and reliable results. Technologically, this requires the interplay of cloud computing, automation and data analytics. At the process level, flexible and scalable enterprise architectures are needed that can be adapted to changing requirements in the spirit of a 'composable enterprise'.

The digital agenda starts with data and governance

The priorities of the 140 user organisations surveyed by Lünendonk show that the AI transformation begins with the fundamentals. 69 per cent intend to improve their data landscape over the next two years. 60 per cent plan to build up in-house AI expertise. This is followed by AI governance, compliance and preparation for the EU AI Act, at 56 per cent. Only then do specific AI applications come to the fore.

Some companies, however, are already a little further along. 54 per cent intend to implement and scale AI agents. 44 per cent are focusing on visibility in AI-powered search systems, 43 per cent aim to optimise the customer journey and experience orchestration, and 31 per cent are prioritising the development of new data-driven business models.

The pattern is clear: companies are not merely investing in AI applications. They are first establishing the organisational, technological and regulatory foundations for their deployment. The comparatively lower priority given to specific AI-powered DX applications should therefore not be interpreted as a lack of relevance. It demonstrates that many companies first need to further develop their data, capabilities and governance structures.

DX agenda 2026/2027: AI transformation and data landscapes are top priorities

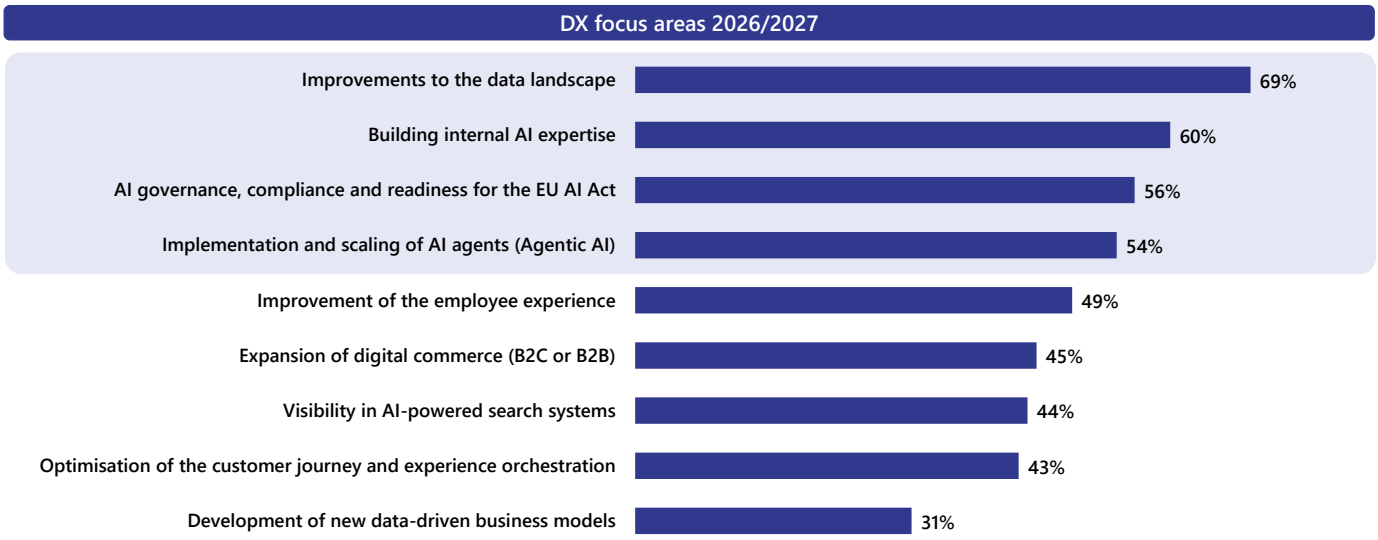


Fig. 6: Which of the following topics will be a priority for your organisation in the area of digital experience over the next two years?; scale from 1 = 'not at all' to 4 = 'very strongly'; the answers shown refer to 'somewhat strongly' and 'very strongly'; relative frequency distribution; all companies; n = 136-140

Investment in digital experience is picking up again

In parallel with the AI transformation in customer-centric areas, investment in digital experience is rising. 79 per cent of the user companies surveyed intend to increase their spending on digital experience over the next two years. 21 per cent are even planning an increase of more than 10 per cent. 20 per cent intend to keep their spending constant, whilst only 1 per cent expect their budgets to fall. There are several reasons for this trend.

Many digital commerce applications, which were set up under considerable time pressure during the COVID-19 pandemic, need to be further developed and more closely integrated into business processes. Connections to marketing, the supply chain and customer service are often still lacking. Without this integration, a digital sales channel does not automatically lead to a significant shift in demand.

There is a particular need for further investment in the B2C sector. One in two companies with a B2C business model is planning to invest in establishing and expanding digital commerce. At the same time, marketing managers are focusing on embedding AI into existing tasks and on how customer journeys can be managed in a data-driven and, in some cases, automated manner. This is creating additional demand for consultancy, transformation and integration services. AI opens up new possibilities in marketing, sales and customer service. Content and media assets can be created more quickly, customer data analysed more efficiently and campaigns managed in a more targeted manner. However, whether this actually results in higher quality or better business outcomes continues to depend on data quality, expert management, governance and integration into existing processes.

Rising demands and new opportunities: 79 per cent of companies expect DX expenditure to rise

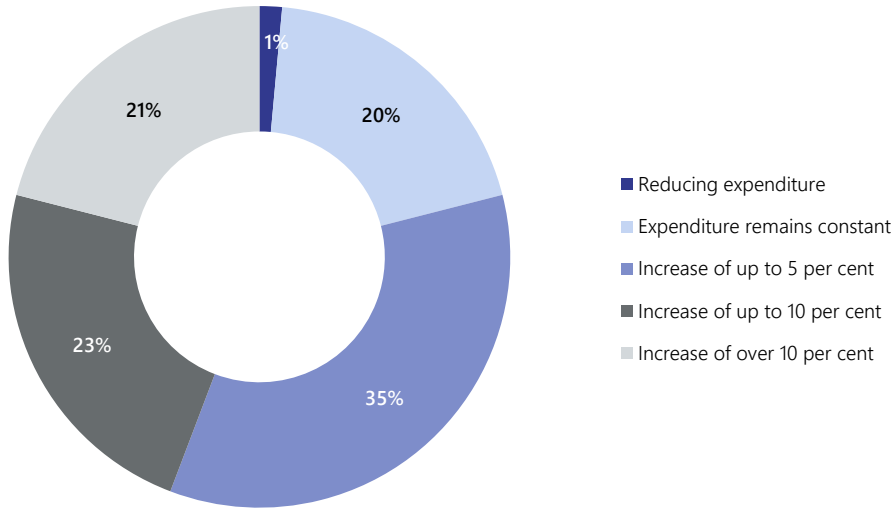


Fig. 7: How will your company's total expenditure on digital experience develop over the next two years?; relative frequency distribution; all companies; n = 137

An analysis of the results shows that B2C companies are more willing to invest than B2B companies: 85 per cent of B2C companies intend to increase their spending on digital experience. Among companies with a B2B focus, this figure stands at 66 per cent. This difference highlights the greater significance of many digital transactions and cross-channel interactions in B2C business. However, it does not mean that the digital experience is becoming less important in B2B business.

DX agenda 2026/2027: AI transformation and data landscapes are top priorities

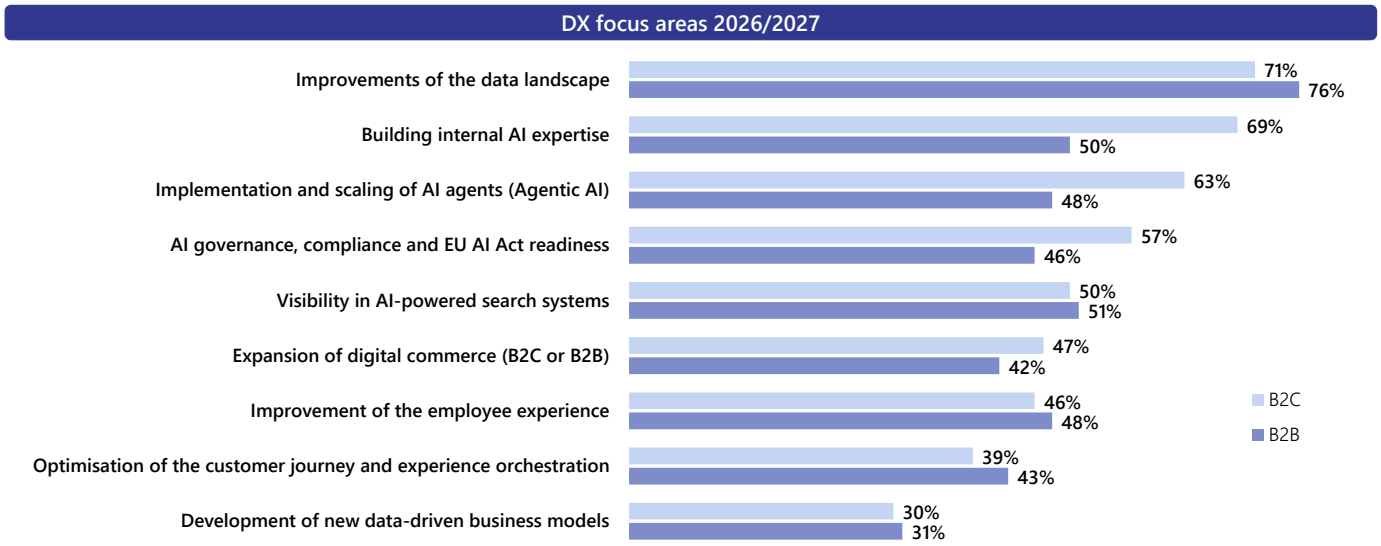
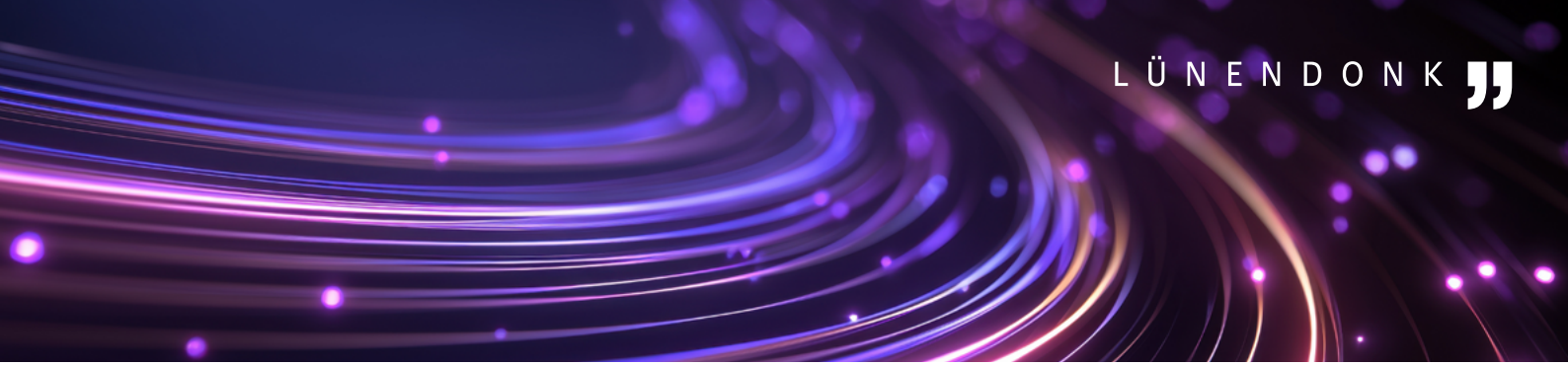


Fig. 8: Which of the following topics will be a priority for your organisation in the area of digital experience over the next two years?; scale from 1 = 'not at all' to 4 = 'very strongly'; the answers shown refer to 'somewhat strongly' and 'very strongly'; relative frequency distribution; all companies; n = 41 (B2B focus); n =70 (B2C focus)



The customer journey is becoming a cross-functional management task

The shift from isolated campaigns towards integrated management of the customer journey requires a realignment of organisational and process structures. Strategy, creative work, content creation, data & AI, DX applications, platforms and operations must be more closely interconnected. This shifts responsibility to the customer side. Marketing, sales and customer service can no longer manage the customer journey independently of one another when this requires shared customer data, interaction histories and service information. Depending on the business model, data from commerce and the supply chain must also be taken into account – for example, to link product availability with digital sales processes.

Companies must therefore define responsibilities, establish data and quality standards, and manage the use of AI in a transparent and auditable manner. Appropriate operational and collaboration models are becoming just as important as the secure, responsible and regulatory-compliant use of AI.

This development is also changing the way companies work with digital agencies and IT service providers. In the traditional agency model, the digital agency takes on defined services – ranging from digital strategy, user experience, design and web development to content, campaigns, media, CRM and marketing automation. The client is typically responsible for the brand, objectives, budget, data access and key approvals.

This division of labour works as long as tasks can be clearly delineated and results defined on a project-by-project basis. However, it reaches its limits when customer journeys need to be managed across multiple channels, content continuously personalised and campaigns constantly optimised based on new data. The marketing operating model is evolving from a sequence of individual campaigns into a continuous process comprising planning, activation, measurement and optimisation.

The findings of the report (see the chapter on 'The customer journey as an end-to-end task') show that a significant proportion of the user organisations surveyed already manage their customer journey, at least in part, via end-to-end services. However, full orchestration has not yet been established across the board. This makes cross-functional collaboration a key organisational task.

Digital agencies: From service providers to integrators

The changes described also affect the role of service providers. They no longer simply supply individual building blocks, but are increasingly shaping the interfaces between strategy, creation, data, technology and operations. Their role therefore increasingly involves establishing, operating and continuously developing integrated marketing processes. One example of this is the content supply chain. Personalised content is not created only through the automated production of text, images or videos. It requires the integration of customer data, content, activation, approval workflows, rights, brand guidelines and measurement.

For DXS service providers, the ability to reliably integrate and continuously operate complex marketing processes is therefore becoming increasingly important. To do this, they need a robust understanding of the industry, business model, customers, brand and internal processes. They must bring together data, models, platforms and workflows within a viable DX architecture and coordinate internal marketing teams, automation, AI agents and other external partners. Their value contribution is thus shifting from the isolated production of individual measures to the orchestration of an integrated marketing system. At the same time, expectations regarding the service providers' contribution to results are rising. They must increasingly demonstrate, in a transparent manner, how their services contribute to business objectives and the customer experience.

Marketing and IT are converging – implementation is still in its early stages

The survey shows that this development is only gradually becoming embedded within the organisational structures of client companies. 26 per cent of respondents confirm that the IT department is increasingly involved in deciding which marketing technologies are used, and that the management of the customer journey is already predominantly technology-based and automated.

24 per cent of the companies surveyed require service providers with more advanced IT skills for their MarTech projects. This figure is significant in that digital agencies have already built up extensive IT expertise in recent years. Nevertheless, just under a quarter of companies expect these capabilities to expand further. This increases the pressure on digital agencies to further deepen their expertise in IT architecture, integration, data and platform operations.

18 per cent are observing a shift in their marketing budgets towards technology and IT investments, or an increasing blurring of the lines between marketing and IT budgets.

Marketing is becoming more technology-driven – traditional agency models are coming under pressure

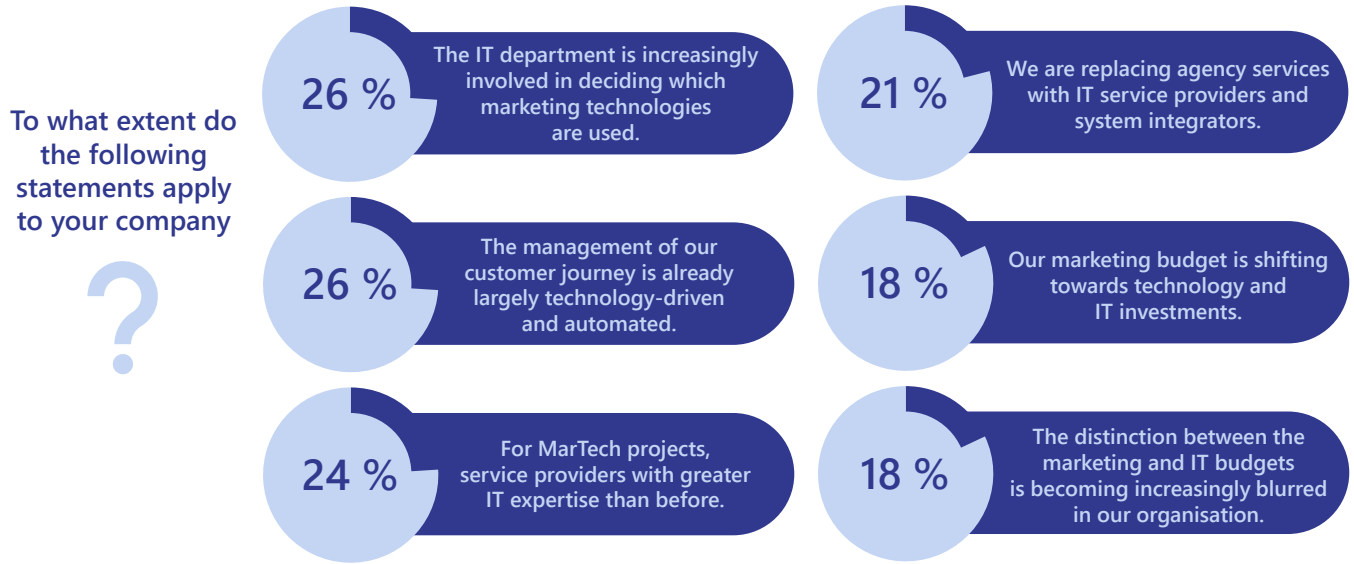


Fig. 9: To what extent do the following statements apply to your company?; scale from 1 = 'does not apply at all' to 4 = 'applies fully'; the answers shown refer to 'somewhat true' and 'completely true'; relative frequency distribution; all companies; n = 135-140

The comparatively low levels of agreement do not mean that companies consider these developments to be unimportant. Rather, they show that the technological transformation of marketing in many companies has either not yet begun or has not yet been fully implemented and embedded within the organisation. Marketing operating models, budget frameworks and responsibilities are, in many cases, still under development.

For traditional digital agencies, this creates a clear need to adapt. They must integrate IT expertise, data literacy and MarTech integration more closely with strategy, creativity and customer experience.

IT procurement is becoming the central gateway to digital experience projects

The growing importance of MarTech and technology-driven customer journeys is also evident in the procurement of digital experience services. 73 per cent of the companies surveyed frequently or always procure service providers for digital experience projects via IT procurement. Access to digital experience is therefore predominantly channelled through a function that assesses technological expertise, system integration and security requirements.

26 per cent frequently or always use marketing or agency procurement. In 25 per cent of companies, procurement is frequently or always carried out via a separate product group for digital experience and customer experience. The response options should not be interpreted as mutually exclusive procurement channels. Rather, they show that, alongside the dominant IT procurement, other procurement approaches exist.

In three-quarters of companies, digital experience projects are procured via IT procurement

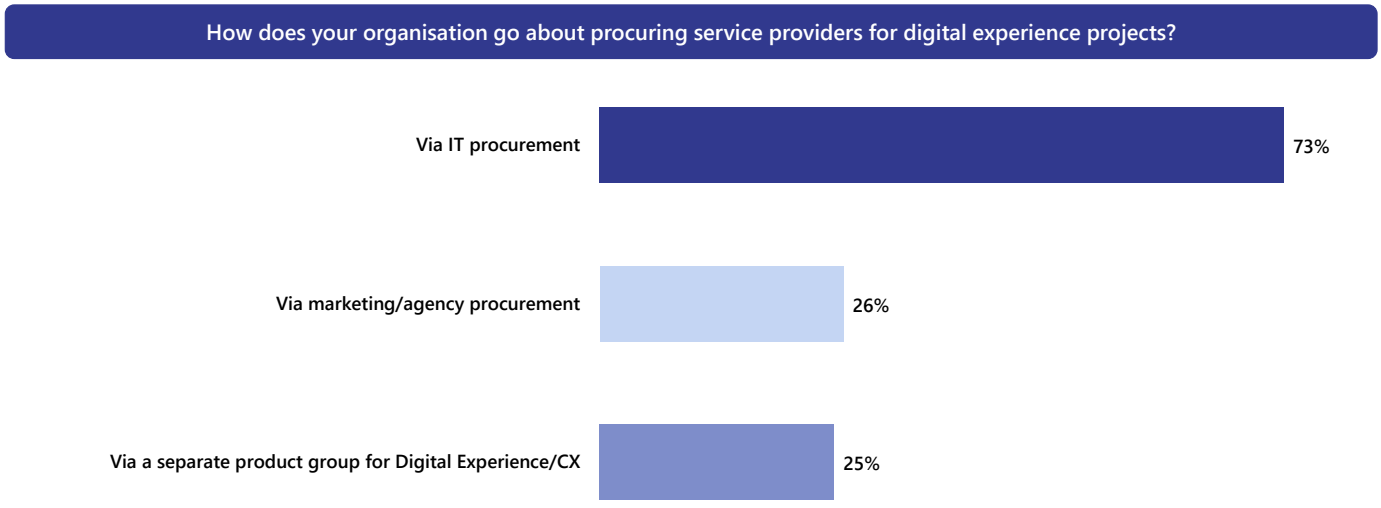
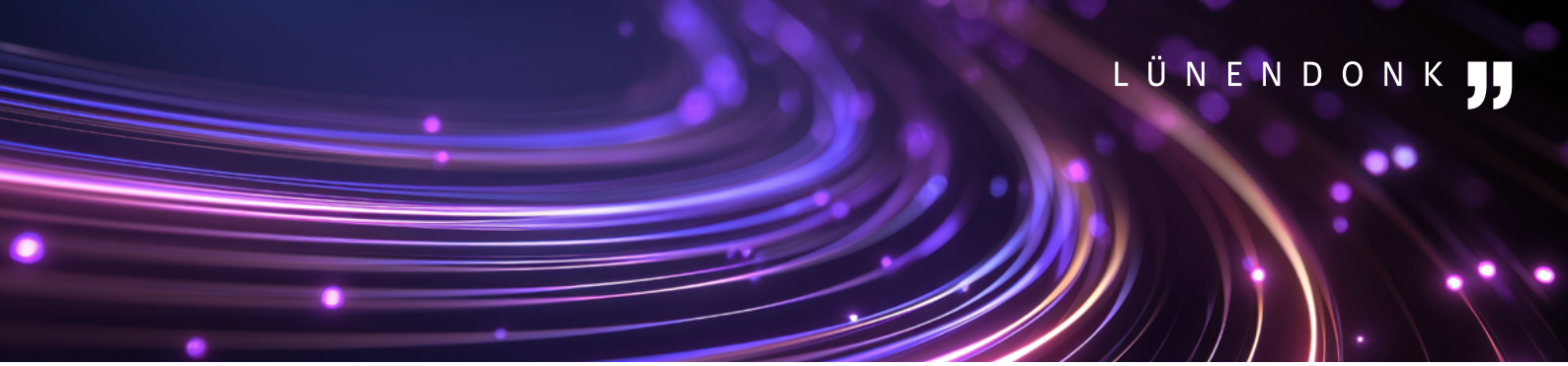


Fig. 10: How does your company procure service providers for digital experience projects?; scale from 1 = 'never' to 4 = 'always'; the responses shown refer to 'frequently' and 'always'; relative frequency distribution; all companies; n = 135-138



Digital experience projects are becoming IT-related procurement initiatives

As IT departments and IT procurement play a greater role in deciding which marketing technologies are deployed and which service providers are commissioned, the positioning of DX service providers is also changing. They must no longer demonstrate their capabilities solely to marketing and creative teams, but also to the IT department, where requirements relating to system architecture, integration, data protection, information security, scalability and IT operating models are relevant.

Digital Experience thus becomes a cross-functional task. Responsibility no longer lies exclusively with marketing or communications. It is shared across marketing, IT, sales, commerce, customer service and procurement. For service providers, this increases the importance of integration expertise and technical delivery capabilities. It will be crucial for user organisations to clearly define responsibilities, data sovereignty, platform accountability and quality standards.

Revenue distribution of DXS service providers

Interdisciplinary client requirements are reflected in the breakdown of DX services

The changes to the design of customer-centric processes described in the previous chapter are placing greater demands on providers of digital experience services. Customers increasingly require services that combine consultancy, agency expertise, technology and operations. This interdisciplinary nature is also evident in the revenue structure of DXS service providers.

The range of providers extends from DXS specialists, who generate almost all their revenue from digital experience services, to broad-based consultancy and IT service providers, for whom DXS forms only part of their overall portfolio.

To enable a comparison of these different business models, Lünendonk distinguishes between DXS specialists and DXS generalists. The focus is on how revenue is distributed across digital consulting services, digital agency services and digital technology services.

On average, the 23 DXS providers surveyed will generate 76.7 per cent of their total revenue from digital experience services in 2025. Among the 13 DXS specialists, this share stands at 97.7 per cent due to their business model. The generalists, which include broad-based consultancy and IT service providers as well as management and IT consultancies, will, by contrast, generate 49.4 per cent of their total revenue from digital experience services.

Technology forms the core of the DXS market

Across all 23 providers, Digital Technology Services account for 48.7 per cent – just under half – of DXS revenue. Digital Consulting Services contribute 30.8 per cent to revenue, whilst Digital Agency Services account for 20.5 per cent. Technology thus forms the economic focus of the market. Consultancy and agency services remain important components of the service offering, but account for smaller shares in the revenue structure.

This distribution of revenue across the individual service categories is in line with changing customer requirements. When customer journeys need to be managed across multiple channels, data integrated and AI applications embedded into existing systems, the demand for platforms, system integration, software development, data architectures and operations increases. Digital experience is therefore no longer merely a question of designing interactions. It is increasingly becoming a task of technological and organisational integration.

Generalists are stronger in consultancy, whilst specialists are more closely aligned with agencies

The differences between DXS specialists and DXS generalists are primarily centred on consultancy and agency services. For DXS specialists, 28.1 per cent of revenue comes from digital consultancy services. For generalists, this figure stands at 34.4 per cent – 6.3 percentage points higher. Generalists therefore generate a larger share of their revenue from consultancy services. The opposite is true for digital agency services. DXS specialists generate 23.9 per cent of their revenue from these services, whilst for generalists the figure is 16.2 per cent. Specialists are therefore more heavily focused on agency-related services, whilst generalists integrate consultancy and technology more closely into a broader transformation portfolio.

In the case of Digital Technology Services, however, the revenue structure is almost balanced. This area accounts for 48.0 per cent of DXS specialists' revenue and 49.4 per cent of DXS generalists' revenue. Technological expertise is therefore not only a hallmark of large consultancy and IT service providers; it also forms an essential part of the business model for traditional digital agencies.

Large IT service providers have a stronger focus on digital consulting – specialists are more strongly represented in agency services

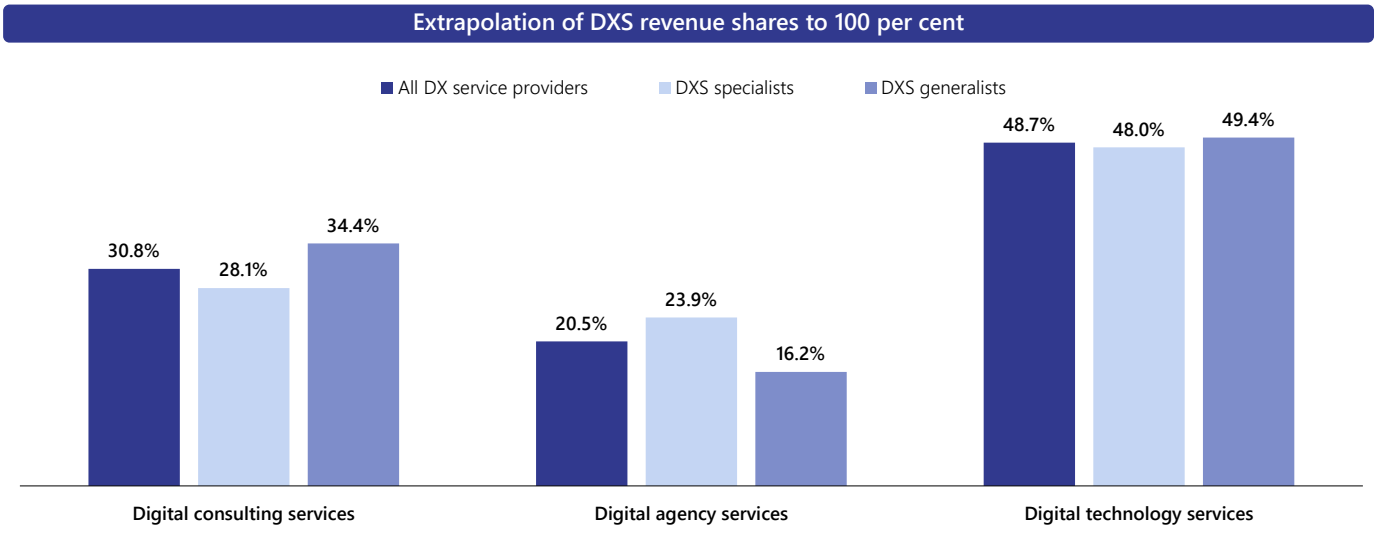


Fig. 11: What percentage of your company's total revenue in Germany was generated in each of the following three categories?; average figures; n = 23 (all companies); n = 13 (DXS specialists); n = 10 (DXS generalists)

Agency Services are under pressure to change due to automation

Plans for future staff expansion show that the DX service providers surveyed are adopting a more cautious approach to Digital Agency Services than in the other two service areas. Across all DXS service providers surveyed, the workforce in agency services is expected to grow by an average of 2.8 per cent. The planned increase in staff numbers is therefore lower than in Digital Consulting Services and Digital Technology Services.

This caution is particularly pronounced among DXS specialists. They plan to increase their workforce in the Digital Agency Services sector by an average of just 1.6 per cent by 2027. At the same time, agency services continue to make a substantial contribution to revenue at traditional digital agencies, accounting for an average of 23.9 per cent. This suggests that service delivery in this area is changing: standardisable and repeatable tasks are increasingly being automated, whilst strategic, technological and integration-related tasks are gaining in importance.

DXS generalists, by contrast, plan to increase their agency capacity by an average of 4.3 per cent by 2027. It should be borne in mind that these providers are starting from a lower baseline and assess their demand trends more positively. The higher planned increase in staff numbers should therefore not be interpreted directly as evidence against automation. It may also be linked to the fact that generalists integrate agency services more closely with consultancy, technology and transformation services.

The plans of the service providers surveyed therefore do not suggest a general replacement of agency services by technology, but rather a coexistence of humans and AI. Nevertheless, contract, billing and delivery models are set to change significantly over the coming years. At the same time, there is a growing need for strategy, data literacy, an understanding of technology, governance and orchestration. The following chapter on AI transformation in the digital experience services market illustrates the extent to which this shift is already reflected in individual services and in providers' delivery models.

DXS service providers are planning to increase staff numbers across all areas – with a focus on consulting and technology services

By what percentage does your company plan to increase or decrease its workforce in the following DX areas by 2027?



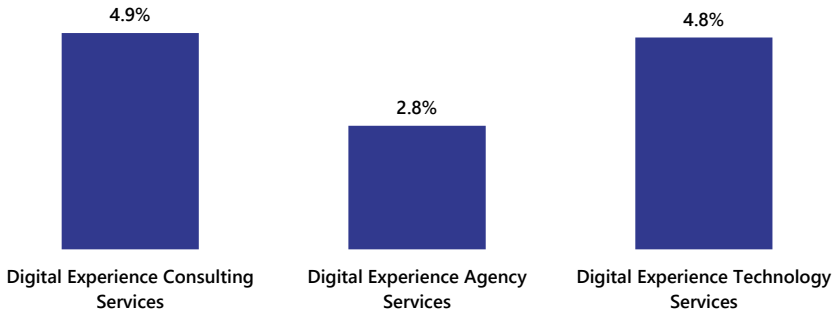


Fig. 12: By what percentage does your company plan to increase or decrease its workforce in the following DX areas in 2027?; average figures; all companies; n = 18

AI transformation in the digital experience services market

AI automates tasks – the traditional service model is under pressure to change

The DX service providers surveyed expect AI to partially or largely automate numerous tasks within DXS service delivery in the coming years.

They forecast the highest proportion of AI in content and media production: starting at an average of 33.3 per cent in 2026, this is set to rise to 54.7 per cent by 2028. This means that, in the medium term, more than half of the services will be delivered in an AI-supported, automated manner. A significant increase is also expected in the area of Data, Analytics & Consumer Insights. The forecast share of AI in service delivery is set to rise from 28.3 per cent in 2026 to 48.0 per cent in 2028. For Digital Marketing and Campaign Services, an increase from 25.0 to 43.2 per cent is expected.

This trend is therefore not limited to creative and analytical services. In Technology Infrastructure & Integration, too, the share of AI is set to rise from 21.9 per cent in 2026 to 40.2 per cent in 2028. Service providers therefore expect that, in future, AI will not only create content or analyse data; it will also be integrated into technical integration and platform processes.

Widespread use of AI: DX service providers expect a significant AI penetration in their DX services

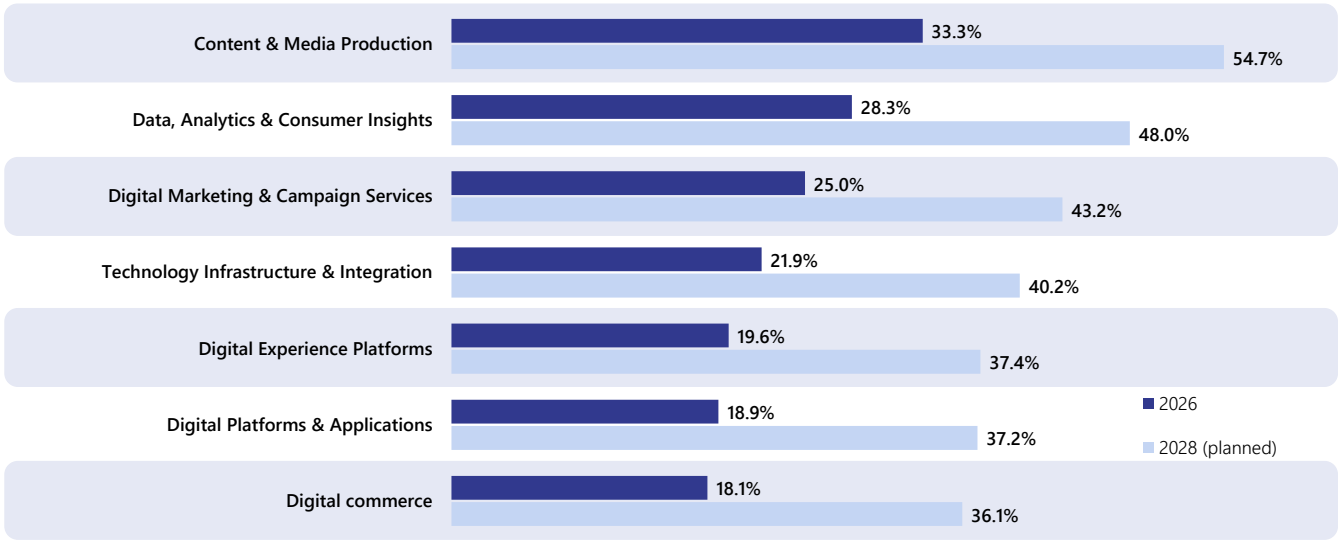


Fig. 13: To what extent do you estimate AI to be involved in the delivery of the following DX services?; 2026 and 2028 (planned); average values; all companies; n = 14-18

Client companies: AI agents are being deployed in customer service, content creation and customer segmentation

The areas of application for AI agents at the client companies surveyed show that the perspective of DX service providers aligns with their clients' specific AI journey, and that the AI transformation is beginning in initial areas of responsibility.

Conversational AI is the most advanced area among the client companies surveyed: 42 per cent of the companies surveyed are already using AI agents productively in this area. A further 27 per cent are in pilot or test phase, whilst 19 per cent are planning to implement them. Dialogue-oriented applications are therefore currently the most widely operationalised area of application. Companies are also already gaining experience in automated content creation and campaign management, as well as in customer data analysis and segmentation. In both areas, 23 per cent of respondents are using AI agents in production. A further 39 per cent are testing AI agents for content and campaigns, whilst the figure for customer data analysis and segmentation is 37 per cent. Including planned projects, a large proportion of companies in both areas are therefore in an active testing or implementation phase.

The use of AI agents is significantly less advanced in areas where they are intended to manage cross-functional processes and decisions along the customer journey. However, the plans of the companies surveyed indicate that preparations for AI deployment are already underway. For customer journey mapping and optimisation, productive use stands at 8 per cent. 33 per cent are testing relevant applications, whilst a further 37 per cent are planning to deploy them. When it comes to proactive customer engagement and service processes, only 6 per cent are currently using AI agents in production. 22 per cent are in pilot or test phase, whilst 32 per cent are planning to implement them.

Autonomous commerce applications are still in their infancy

By contrast, development is not yet at an advanced stage in the areas of agentic commerce, automated bidding and media buying. This may be linked, amongst other things, to factors such as data availability and data quality, a lack of organisational models, and end-to-end process chains that have not yet been fully established.

In any case, the results clearly show that the companies surveyed are now beginning to engage intensively with AI agents in their customer-centric processes and are deploying them in key DX areas such as customer service, content creation, campaign management, and data analysis and segmentation. However, to scale this further across the DX value chain, they require a higher degree of data integration, data quality, interconnected systems, clear responsibilities and control mechanisms for automated or autonomous decisions.

AI agents can only effectively manage customer journeys or entire operational marketing processes if customer data is consistent, up to date and available across all systems. AI-supported customer journeys require consistent, up-to-date customer data that is available across all systems. Without this foundation, AI systems cannot reliably place interactions, preferences and transactions within a shared context. The result is flawed recommendations, inappropriate personalisation and an inconsistent customer experience.

AI agents are already being used in dialogue and data processing – autonomous commerce applications are still in their infancy

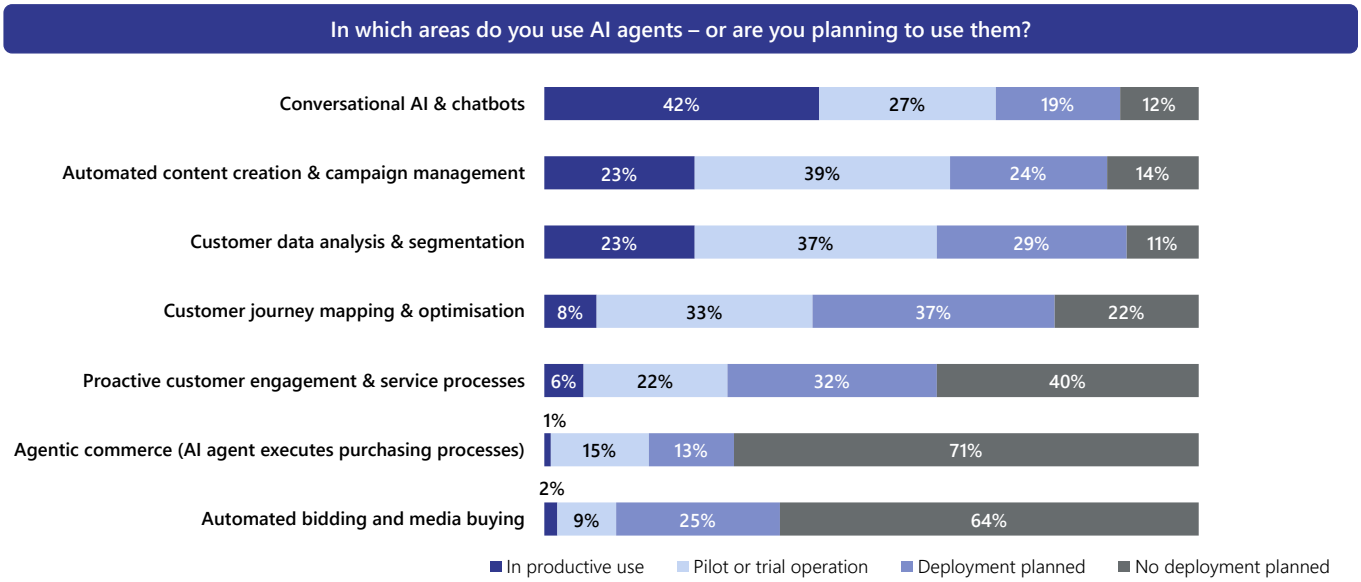


Fig. 14: In which areas do you use AI agents – or are you planning to use them?; scale from 1 = 'no plans to use' to 4 = 'already in productive use'; relative frequency distribution; all companies; n = 138

AI agents are not yet scaling out: the data foundation remains the bottleneck

The companies surveyed see the greatest need for action regarding their own data infrastructure as they pursue further AI transformation. 30 per cent consider an independent first-party data strategy to be essential. 27 per cent wish to invest in their own technical data infrastructure. 24 per cent regard the development of internal data expertise and a data strategy as important. 20 per cent each cite the creation of incentives for active customer consent and the consolidation of data from CRM, e-commerce and other sources.

The results show that the foundation for AI is not created by new applications alone. Companies must systematically collect, integrate and use customer data from their own interactions in a manner that complies with the law. This requires a transparent value exchange. Customers must be able to recognise the specific benefits they derive from the use of their data when they consent to its storage.

The declining availability of external tracking signals is increasing the pressure on companies to build up their own data sets and reliable identities. The specific development of individual platform strategies is less crucial than the overarching question of whether companies can increasingly organise their customer relationships based on their own, quality-assured data.

Companies are prioritising autonomy when it comes to their data foundations: strategy, infrastructure and in-house expertise are the top priorities

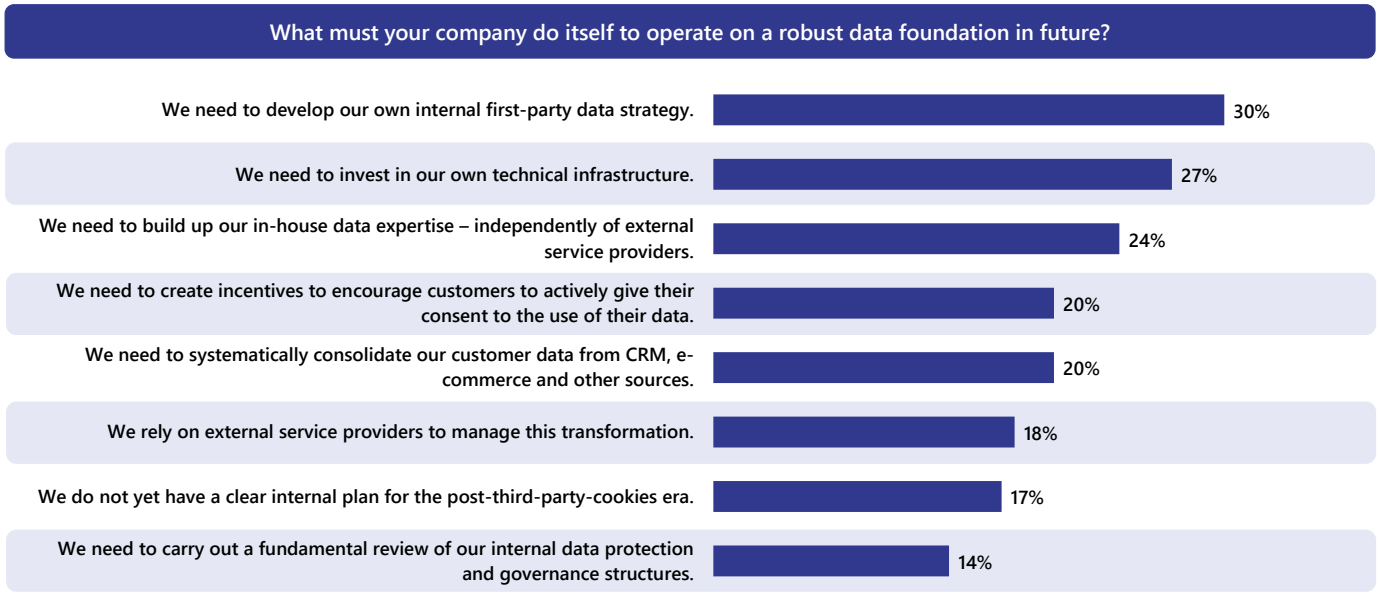


Fig. 15: What must your company do itself to operate on a robust data foundation in future?; multiple answers allowed; relative frequency distribution; all companies; n = 131

Customers expect robust AI expertise from their DX service providers rather than individual use cases

When selecting DX service providers, 55 per cent of the companies surveyed look for transparent AI security, compliance and data frameworks. 52 per cent take into account certifications and evidence of AI governance. 50 per cent each expect evidence of successfully implemented AI projects, as well as proof-of-concepts and pilot projects.

From the customer's perspective, the focus is therefore initially on the controlled and robust use of AI. Service providers must demonstrate that they can not only deploy AI applications technically, but also integrate them into customer processes in a secure, legally compliant and traceable manner. The market is thus not merely demanding new use cases. What is required are robust concepts for data, security, compliance, governance and business control.

This creates a tension: user organisations expect demonstrable experience, yet in many cases have not yet scaled up AI comprehensively themselves. It will therefore be crucial whether service providers further develop their own operating models and integrate AI into their delivery in a productive, controlled and measurable manner. Only then will robust AI expertise emerge that extends beyond individual projects and pilot applications.

Security, governance and practical experience are key factors in the selection of digital agencies

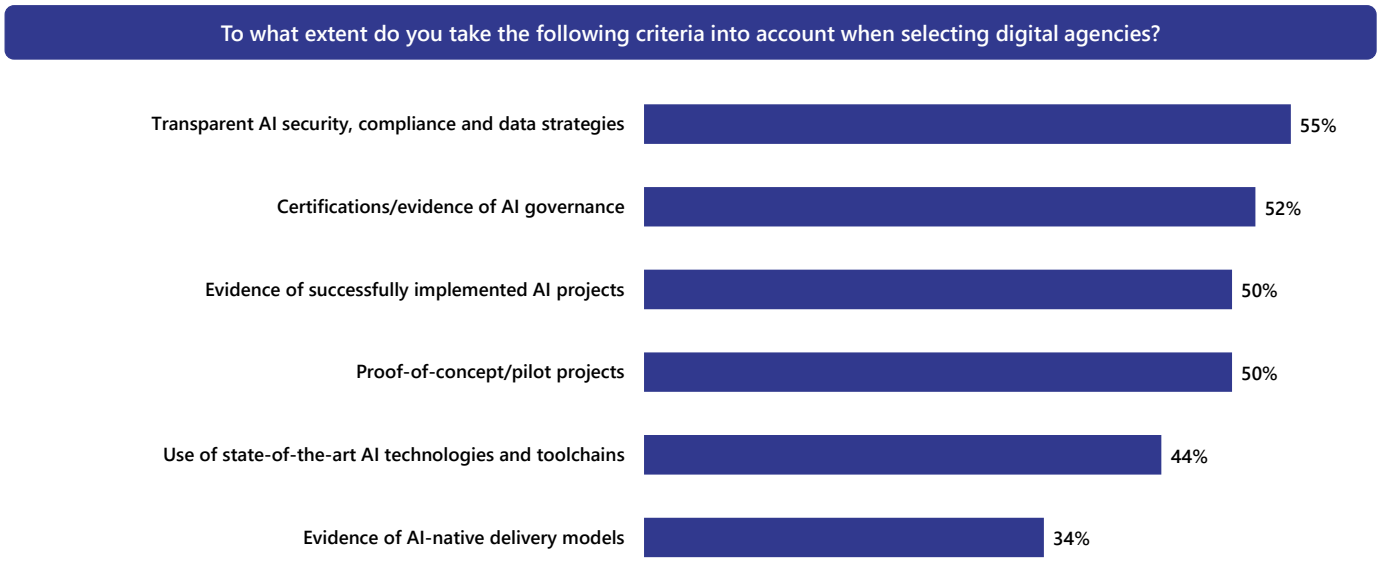


Fig. 16: To what extent do you take the following criteria into account when selecting digital agencies?; scale from 1 = 'not at all' to 4 = 'very important'; the responses shown refer to 'somewhat important' and 'very important'; relative frequency distribution; all companies; n = 134-137

From individual AI applications to AI-native delivery

In the coming years, client organisations expect further changes in the selection of their external DX service providers.

43 per cent believe that AI-native delivery models, which generate measurable efficiency and quality benefits, will become increasingly important in the future. AI-native delivery means more than simply using individual tools; it refers to a service model in which AI is structurally integrated into processes, roles, quality assurance and governance.

Similarly, 43 per cent expect integrated portfolios comprising management consultancy, IT services and digital agency services to become more relevant. 40 per cent each see a growing importance in the ability to act as an integrator, taking on the strategic management of transformation programmes and end-to-end technological responsibility. A further 40 per cent expect evidence of outcomes based on measurable business results – rather than purely output or activity metrics.

These requirements describe the next stage of development in AI transformation within the DXS market. It will no longer be sufficient for service providers to simply deliver AI applications or demonstrate productivity gains. They must further develop their delivery models, capabilities and areas of responsibility in such a way that AI is embedded within integrated transformation programmes, data architectures and customer journeys.

DX service providers must become integrators: AI-native delivery, integrated expertise and measurable outcomes are key

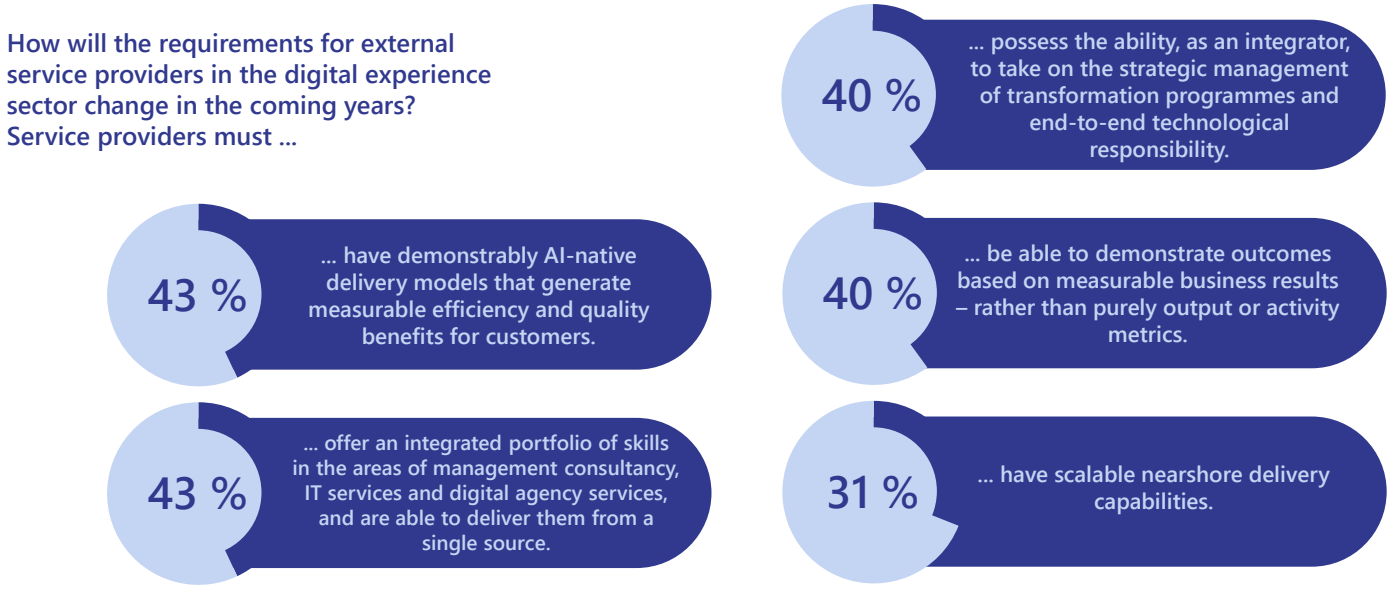


Fig. 17: How will the requirements for external service providers in the digital experience sector change in the coming years? Service providers must...; the answers shown refer to 'increasing importance'; relative frequency distribution; all companies; n = 134-137

AI reduces FTE requirements – whilst the need for new skills increases

According to the service providers themselves, the increasing automation of traditional DXS services will also have an impact on staffing requirements. 55 per cent of the DX service providers surveyed expect their staffing requirements to fall over the next three years. Of these, 50 per cent anticipate a decline of between 5 and 15 per cent. A further 5 per cent anticipate a reduction of more than 15 per cent. For 30 per cent of providers, FTE requirements will remain largely stable, whilst 15 per cent expect a slight increase.

The expected decline is particularly plausible in areas where AI takes over standardisable and repeatable tasks. However, this trend does not mean that the need for qualified staff will disappear altogether. Rather, the requirements are shifting: fewer staff are needed for the manual delivery of individual services. At the same time, skills relating to data quality, AI governance, model management, integration and the orchestration of complex customer journeys are becoming increasingly important.

This creates a twofold pressure to adapt for DXS providers. On the one hand, they must translate efficiency gains from AI into their delivery and pricing models. On the other hand, they require new skills to reliably integrate AI solutions into existing platforms, data architectures and customer processes. In future, it will not be just the number of available FTEs that matters, but the combination of technological expertise, data literacy and strategic management capabilities.

AI is changing staffing requirements: 55 per cent expect a decline in FTE requirements

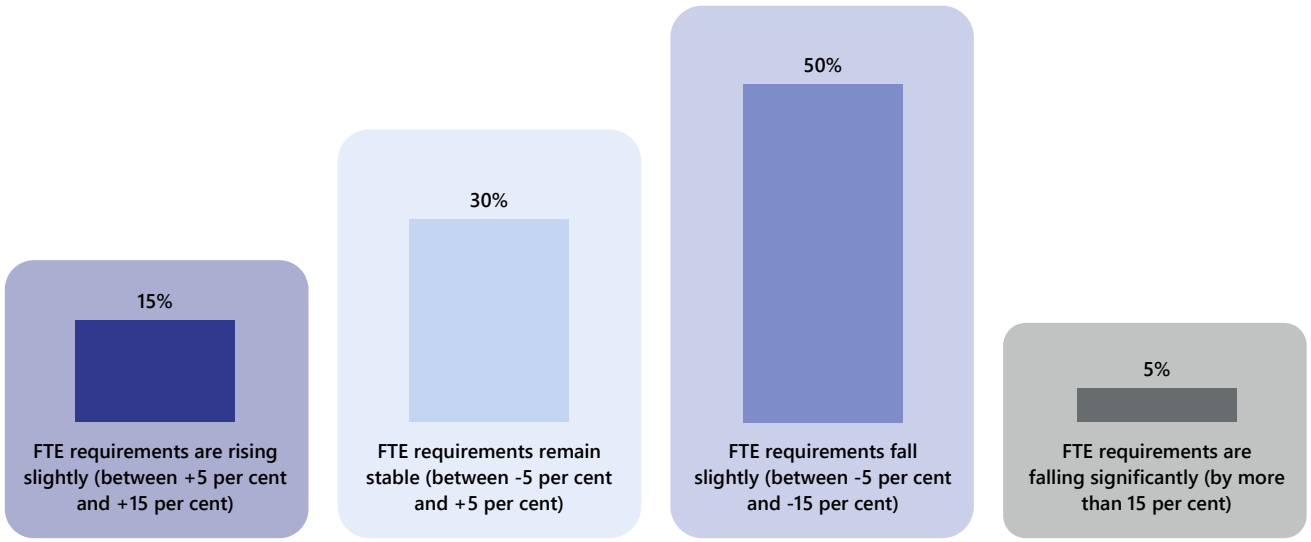


Fig. 18: How will the use of AI technologies affect your FTE requirements over the next 3 years?; relative frequency distribution; all companies; n = 20

Revenue trends and forecasts for DXS service providers

The shift in the DXS market towards technology, integration and AI, as described in the previous chapters, is also reflected in the business performance of providers. The overall market is growing, though not uniformly. A significant growth gap is emerging between DXS specialists and more broadly positioned DXS generalists.

The 23 DXS service providers examined increased their revenue from digital experience services by an average of 2.0 per cent in 2025. Whilst this represents a significant improvement on the previous year, when growth stood at 0.5 per cent, growth remains at a low level.

The differing trends become particularly clear when comparing the provider groups: whilst the DXS specialists – primarily traditional digital agencies – recorded an average decline in revenue of 1.1 per cent, the DXS generalists increased their revenue from digital experience services by 7.3 per cent.

There are several possible reasons for these differing trends. Traditional agency services have been under pressure from competition, pricing and automation for years. Added to this are international delivery models and the increasing shift of standardisable services towards technology-supported processes. These factors are likely to affect, in particular, providers whose business model relies heavily on project-based creation, content production or campaign implementation.

DXS generalists, by contrast, can draw on a broader portfolio. They appear to benefit more from the demand for organisational and process consultancy, new operating models in marketing and sales, and the development and integration of digital solutions. This is a plausible interpretation of the differing business performance, not a causal relationship substantiated by the revenue data alone.

Furthermore, the average masks a wide variation within the group of DXS specialists. Their revenue performance ranges from a fall of 18 per cent to a rise of 11 per cent. Among the DXS generalists, by contrast, none of the providers surveyed recorded a decline in revenue from digital experience services. The DXS market is therefore not only developing differently between the provider groups; business performance also varies significantly within the traditional digital agencies themselves.

Revenue trends: Generalists showing strong growth, specialists increasingly under pressure – wide variation in both directions



Fig. 19: How did your company's revenue in the 'digital experience services' segment in Germany develop from 2024 to 2025?; average figures; n = 18 (all companies); n = 10 (DXS specialists); n = 8 (DXS generalists)

Sector breakdown

The economic situation continues to weigh on the DXS market. Export-oriented industries, and the automotive sector in particular, are facing intense competitive and cost pressures. As some DXS service providers have historically had a high proportion of automotive business, this has in some cases led to correspondingly sharp declines in demand. These declines have had to be offset by expanding business with other sectors.

Different drivers of demand are emerging. The industrial sector outside the automotive industry is showing the first signs of a recovery. Rising demand is also being reported from the financial services sector and the process industry. Within the process industry, the pharmaceutical sector in particular is providing additional momentum, whilst the energy-intensive chemical industry continues to suffer from the strained economic situation.

The sectoral trend thus confirms the fundamental market thesis: demand for digital experience is not disappearing. It is shifting between sectors and service areas. Providers therefore require not only technological and specialist expertise but also sufficient sectoral breadth to offset fluctuations in demand from individual industries.

Key sectors: Demand from the automotive sector is falling, manufacturing on the rise

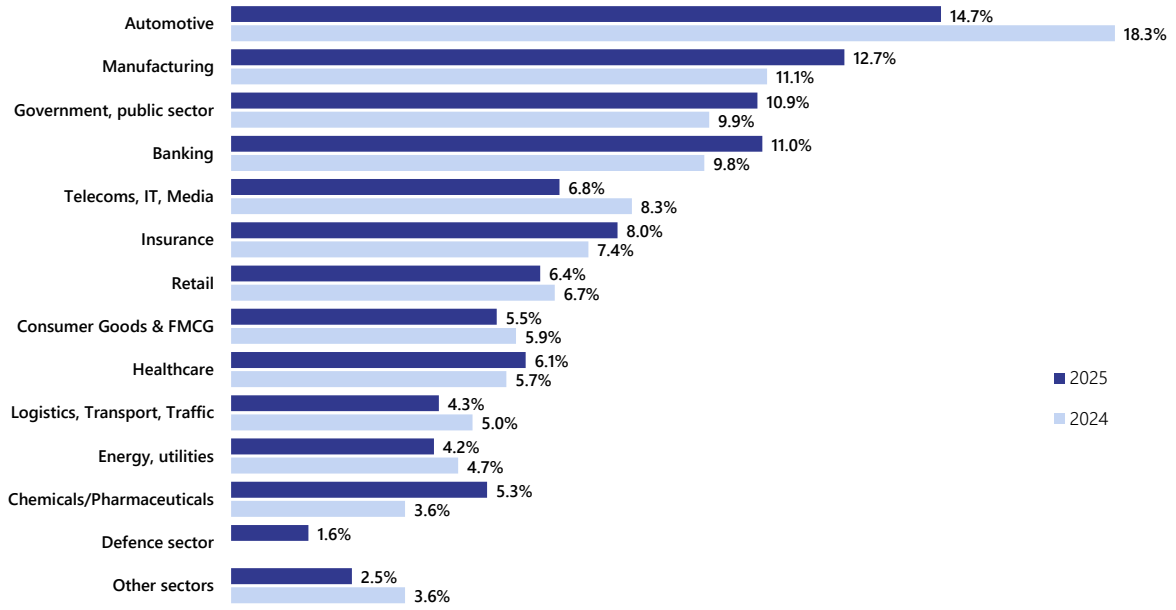


Fig. 20: In which of the following sectors does your company operate with digital experience services?; average values; all companies; n = 19

Outlook for future business development

The varying business trends of 2025 are also reflected in the forecasts for 2026. DXS specialists expect average revenue growth of 1.1 per cent for the current year. For DXS generalists, the average forecast is significantly higher at 9.3 per cent.

The generalists therefore anticipate significantly more dynamic growth in the short term than the traditional digital agencies. The forecasts presumably reflect the different portfolio orientations: consultancy, integration and technology services tend to benefit more from the reorientation of operating models and the development of data and AI capabilities. Traditional digital agencies, on the other hand, must adapt their business models and delivery structures more closely to automation and changing demand.

From 2027 onwards, DXS specialists in particular expect demand to pick up. Whether these expectations are met depends largely on how quickly providers expand their expertise in AI consulting, organisational and process consultancy, system integration and IT operations. At the same time, marketing budgets remain under pressure due to efficiency requirements and the automation of services.

This creates a dilemma for DXS service providers: on the one hand, they must further develop their services technologically and deliver them more efficiently. On the other hand, they must build up new consultancy and integration capabilities without losing the skills relevant to customer experience in strategy, creativity and customer understanding.

Growth in the DXS segment is expected to pick up again as the economy recovers – generalists are significantly more optimistic

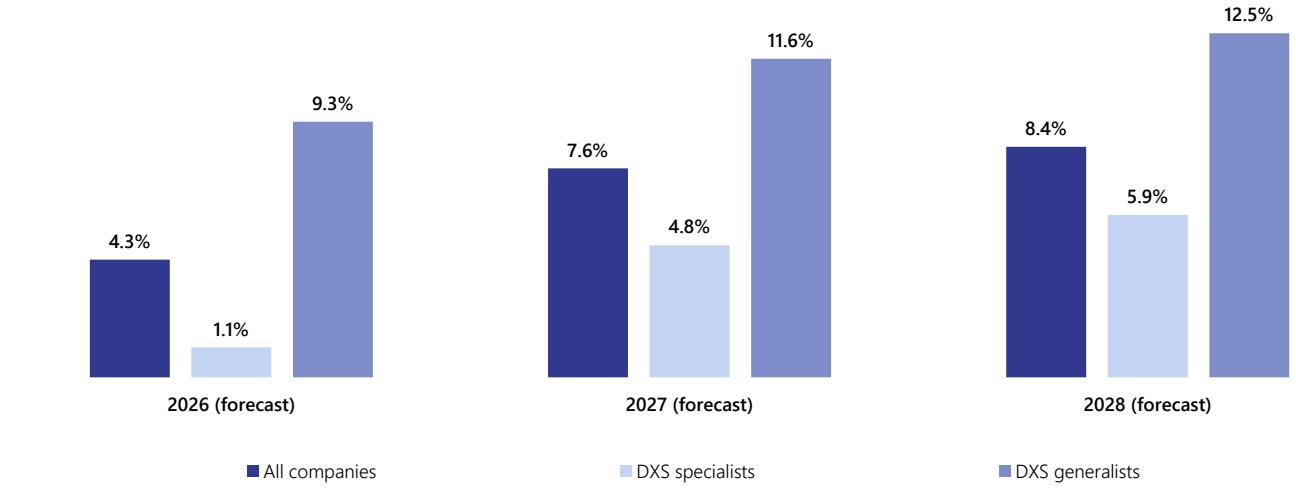


Fig. 21: How do you expect your company's revenue in the 'digital experience services' segment in Germany to develop?; average values; n = 16-18 (all companies); n = 10-11 (DXS specialists); n = 6-7 (DXS generalists)

Lünendonk List 2026: Leading DXS providers in Germany

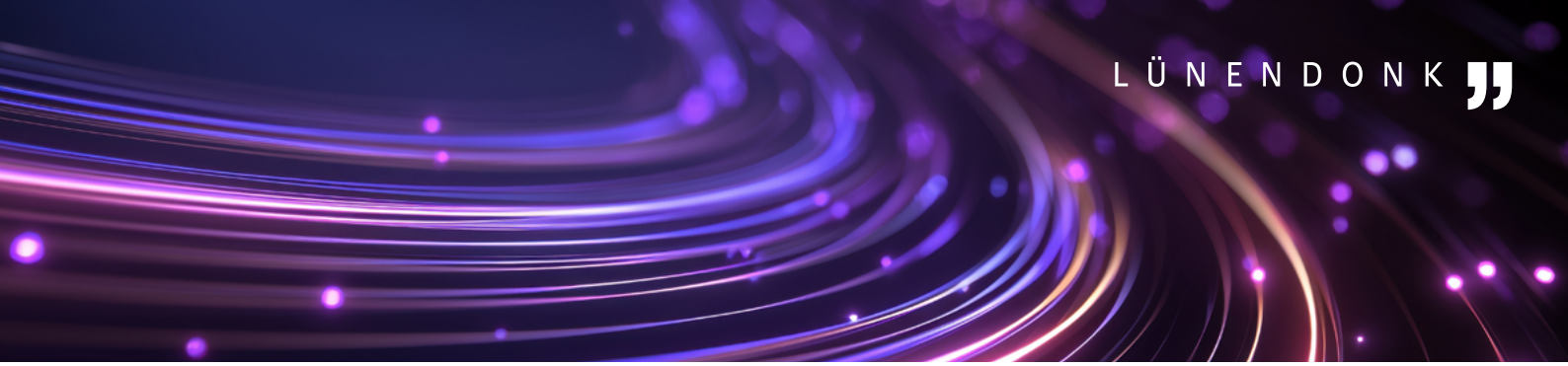
The Lünendonk List presents the leading service providers for digital experience services. Lünendonk has chosen not to rank providers according to DXS segment revenue, as the exact segment revenue figures for digital experience services cannot be verified from public sources, particularly in the case of hybrid consultancy and IT service providers. Furthermore, many service providers do not clearly distinguish their revenue from segments such as digital experience services from their other services. An accurate representation of revenue from digital experience services – and thus a reliable basis for comparison – would therefore not be guaranteed.

However, the Lünendonk List shows how the revenue from digital experience services reported by the service providers to Lünendonk is distributed across the three areas of Digital Consulting Services, Digital Agency Services and Digital Technology Services, and how broadly positioned the individual service providers are. A detailed description of the individual service providers follows on the following pages.

The Lünendonk Portfolio in the following chapter provides detailed information, based on data reported to Lünendonk, on the market strength of individual service providers, their revenue from digital experience services, their client and delivery structures, the breadth and depth of their portfolios, and the competence assessments provided by the user companies surveyed. In addition, the Lünendonk sub-ranking lists those service providers that generate at least 75 per cent of their revenue from digital experience services and are therefore almost exclusively active in this segment.

Lünendonk® List 2026:
Leading providers of Digital Experience Services in Germany

Rank 2026	Company	Revenue in 2025 in Germany in million euros	Digital experience service portfolio – revenue share with ...		
			Digital Consulting	Digital Agency	Digital Technology
1	Accenture Holding B.V. & Co. KG, Kronberg *) 1) 2)	3,600.0	●●	●●	●●●
2	Capgemini Deutschland GmbH, Berlin *) 2)	2,240.0	●●●	●	●●●
3	IBM Deutschland GmbH, Ehningen *) 2)	2,220.0	●●	●●	●●●
4	Deloitte GmbH, Munich 3)	1,583.0	●●	●	●●●
5	PwC GmbH, Frankfurt am Main 3)	1,575.0	●●●	●	●●●
6	Infosys Limited, Frankfurt am Main *)	1,300.0	●●	●	●●●
7	adesso SE, Dortmund	1,225.7	●●	●●	●●●
8	msg systems ag, Ismaning	973.7	●●	●	●●●
9	Reply Deutschland SE, Gütersloh *)	475.0	●●	●	●●●
10	valantic GmbH, Munich 1) 4)	360.1	●●●	●	●●●
11	Plan.Net Germany GmbH & Co. KG, Munich 5)	258.8	●●●	●●	●●
12	Deutsche Telekom MMS GmbH, Dresden	257.0	●●	●	●●●
13	]init[AG für digitale Kommunikation, Berlin 1)	214.8	●●	●	●●●
14	Diconium Group GmbH, Stuttgart	176.0	●●	●	●●●
15	Exxeta AG, Karlsruhe	133.0	●●	●	●●●
16	Conclusion DACH GmbH, Munich	101.3	●	●	●●●
17	Valtech GmbH, Düsseldorf	84.6	●●	●●	●●●
18	team neusta SE, Bremen 1) 6)	76.2	●●	●●	●●●
19	Digitas GmbH, Hamburg	54.5	●●	●●	●●
20	Syzygy AG, Bad Homburg	46.1	●●	●●	●●



Inclusion criterion in the Lünendonk®-List:

Only companies that generate at least 60 per cent of their revenue from services (e. g. management and IT consulting, digital agency services) and generate significant revenue in each of the three segments of digital consulting, digital agency services and digital technology services are included. Companies with a DXS revenue share of less than 50 per cent must also generate at least 100 million euros with DXS services, while companies with a DXS revenue share of less than 30 per cent must generate at least 200 million euros in DXS revenue.

Footnotes:

*) Revenue figures and shares are estimated.
1) Figures include acquisitions.
2) Revenue also includes revenue from management consulting.
3) Figures relate to the advisory business.
4) Difference compared to the 2026 Lünendonk Survey 'The Market for IT Services in Germany' due to the reporting of provisional figures.
5) Revenue represents fee income.
6) Figures include disposals.

Share of revenue with the digital experience portfolio:

●●● Share of digital experience portfolio exceeds 40 per cent
●● Share of digital experience portfolio between 20 and 40 per cent
● Share of digital experience portfolio amounts to up to 20 per cent

Fig. 22: Lünendonk® List 2026: "Leading providers of Digital Experience Services in Germany"

Still in the top 5: Accenture, Capgemini, IBM, Deloitte and PwC

Accenture continues to lead the German DXS market this year. Although the company does not publish figures on its revenue from digital experience services, Lünendonk estimates that Accenture holds the strongest market position. Accenture also tops the Lünendonk List of 'Leading IT Consulting and System Integration Companies in Germany', with Lünendonk estimating its German revenue at 3.6 billion euros. The reported revenue relates to the entire IT consultancy and systems integration business and is therefore not equivalent to DXS revenue. Capgemini follows in second place with total revenue in Germany estimated by Lünendonk at 2.24 billion euros.

IBM is just behind with an estimated revenue in Germany of 2.22 billion euros. IBM consolidates its DXS activities within IBM iX, the global experience design and digital transformation consultancy arm of IBM Consulting. Deloitte and PwC once again occupy fourth and fifth places. Deloitte generates domestic revenue of 1.583 billion euros, placing it just ahead of PwC with 1.575 billion euros. For both companies, the revenue figures shown in the Lünendonk List relate exclusively to the advisory business, within which digital experience activities are consolidated.

Ranks 6 to 10: Infosys, adesso, msg, Reply and valantic

The entry of Infosys has altered the order in 6th and 7th place: Infosys takes 6th place with an estimated revenue in Germany of 1.3 billion euros, whilst adesso follows in 7th place with a revenue of 1.26 billion euros. With WongDoody, Infosys has a creative and design-oriented experience unit. It combines consumer insights, brand management, and UX/UI and product design with the group's technology and transformation expertise.

The next places are taken by msg with a revenue in Germany of 973.7 million euros, Reply with 475.0 million euros and valantic with 360.1 million euros.

Ranks 11 to 20: Plan.Net, Deutsche Telekom MMS, init, Diconium, Exxeta, Conclusion, Valtech, team neusta, Digitas and Syzygy

The second half of the ranking is dominated by DXS specialists. The Plan.Net Group leads the field with domestic revenue of 258.8 million euros, recording growth of around 4 per cent. Plan.Net is the digital experience and technology unit of the Serviceplan Group.

In positions 12 to 15, in the same order as last year, are Deutsche Telekom MMS with 257.0 million euros, init with 214.8 million euros, Diconium with 176.0 million euros and Exxeta with 133.0 million euros.

Conclusion has moved up two places compared with the previous year and ranks 16th with domestic revenue of 101.3 million euros. Valtech follows in 17th place with 84.6 million euros, and team neusta in 18th place with 76.2 million euros. Digitas and Syzygy occupy 19th and 20th place with 54.5 million euros and 46.1 million euros respectively.

The key competitors in the DXS market

The market for digital experience services in Germany is characterised by a diverse range of providers. International consultancy and IT service providers such as Accenture, adesso, Capgemini, Reply and PwC possess DXS expertise, as do digital agencies that have traditionally focused on agency services and have built up consultancy and IT expertise in recent years. As a result, their service offerings are increasingly overlapping.

The Lünendonk List ranks the leading DXS service providers based on their revenue in Germany. The competitor analysis complements this perspective by examining which service providers are perceived by the surveyed service providers as their four most important competitors in the digital experience services market.

Accenture leads this competitive field by a clear margin: 85 per cent of respondents name the company as one of their four most important competitors. Deloitte follows with 55 per cent of mentions, Capgemini with 35 per cent and adesso with 30 per cent. Reply and IBM iX each achieve 25 per cent.

The main competitors: Accenture dominates, but the field is getting tighter behind it

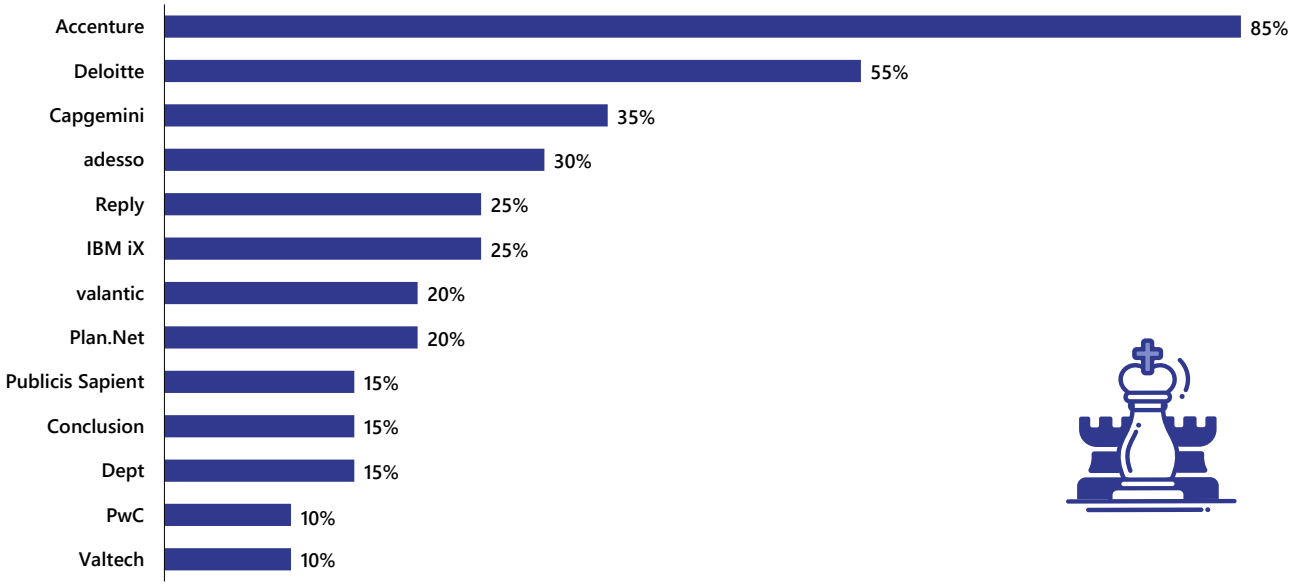


Fig. 23: Which companies are your four main competitors as a full-service provider of digital experience services in Germany?; relative frequency distribution; all companies; n = 20

Lünendonk Portfolio 2026: Classification of leading DXS providers in Germany

In addition to the Lünendonk List, the Lünendonk Portfolio contributes to transparency regarding the positioning and market strength of the leading DXS providers. As part of the market survey, service providers are compared on the basis of their respective portfolio focuses, market shares and market perception. The classification of service providers along the two axes of 'DXS market strength' and 'DXS portfolio depth and breadth' is based on several factors.

The analysis incorporates not only the information provided in writing by the service providers regarding their business performance and their DX portfolio, but also the assessments of the user companies surveyed. These companies were asked to evaluate DXS service providers in the areas of 'Digital Consulting Services', 'Digital Agency Services' and 'Digital Technology Services', and to indicate which service providers they perceive in the market as providers of digital experience services.

To interpret the rankings correctly, it should be borne in mind that all service providers listed in the Lünendonk Portfolio offer a wide range of digital experience services and are therefore among the leading DXS service providers.

The overview shows that all the providers listed are fundamentally capable of delivering end-to-end services in the areas of digital experience, digital commerce and digital marketing,

However, the DXS service providers operating in Germany differ, in some cases significantly, in terms of the depth and scope of their digital experience services, their sector specialisms, and their ability to implement projects end-to-end. Some service providers cover the entire value chain with a broad range of services. Others offer particularly comprehensive coverage in specific areas – such as digital marketing or e-commerce platforms – or in certain sectors such as the public sector, retail or the automotive industry. Still others, whilst possessing a broad DXS portfolio, demonstrate less depth in individual service areas.

Lünendonk Portfolio 2026: Leading DXS providers in Germany

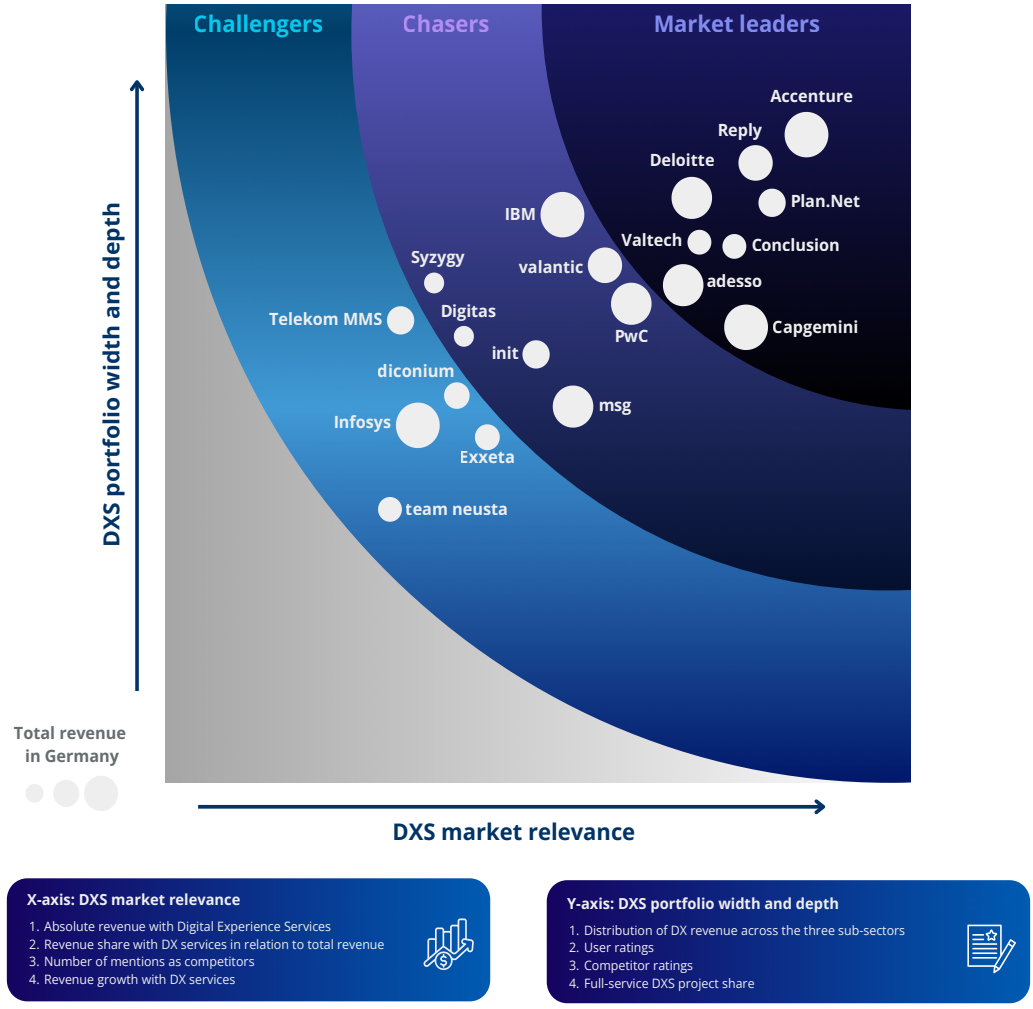


Fig. 24: Lünendonk Portfolio 2026

The market leaders

As in the Lünendonk List, **Accenture** is also positioned as a market leader in the Lünendonk Portfolio. The globally active consultancy and technology group is particularly frequently cited as a relevant competitor in the DXS market. Accenture has extensive international reach, strong consultancy and technology expertise, and a broad ecosystem of creative, design, commerce, data and platform capabilities.

Since the reorganisation of the Accenture group in 2025, Song has been positioned as an independent 'Reinvention Partner' for customer-centric areas in marketing, customer service and sales. These include customer growth strategy, marketing, sales, service, commerce, design, digital products, data and AI. In June 2026, Accenture also announced the acquisition of Whalar. Whalar expands the offering to include scaled creator and influencer activation, social commerce and creator-based customer experiences. Furthermore, in March 2026, Accenture acquired a stake in DaVinci Commerce – a provider of an AI-based commerce experience platform – via Accenture Ventures.

Reply is one of the long-standing market leaders in the DXS sector and is also featured in the Lünendonk List of the largest IT consultancy and systems integration companies in Germany. In the field of digital experience, Reply pursues a holistic, customer-centred approach and is expanding its expertise in areas such as digital marketing, digital commerce, digital humans, conversational AI and agentic commerce.

With Spark Reply, the group has a unit specialising in experience design and agentic systems. Spark Reply develops concepts for collaboration between humans and AI agents in customer and employee experience processes, combining user experience, agentic system architectures and prompt engineering. Bitmama Reply also expands the portfolio with creative and strategic expertise in the areas of digital branding, brand experience and digital communication. The agency combines strategy, creation, design and technology, working on integrated digital campaigns and digital brand experiences, amongst other things.

Reply is also significantly expanding its capabilities in the integration of artificial intelligence, content production and personalised campaigns. Under Reply AI Studios, the group brings together expertise in generative video and image production, CGI products, generative voices and music, virtual production, 2D and 3D animation, compositing and sound design. With the Reply AI Film Festival and the Reply AI Music Contest, Reply has also established international platforms for the use of AI in film, music, video and live performance.

In digital commerce, Reply is increasingly integrating commerce platforms with conversational AI, generative AI and personalised interactions. Digital humans can be used as a digital interface for advice, product information and customer service. Reply develops corresponding solutions in the areas of customer experience and digital commerce, although the specific use of digital humans in commerce varies depending on the use case and level of maturity.

Deloitte is also among the market leaders. The internationally active audit and consultancy group combines strategy, technology, transformation and industry expertise with the services offered by Deloitte Digital. Its digital and experience services range from customer and marketing transformation, through service and product design, to the implementation of platforms and data-driven solutions.

Deloitte Digital is one of the largest providers internationally in the agency and experience sector. In Germany, Deloitte benefits from a combination of high brand awareness, comprehensive industry expertise and integration into the wider consultancy portfolio. Currently, the focus is shifting towards generative and agent-based AI in marketing, sales, customer service and internal processes.

The **Plan.Net Group**, as part of the Serviceplan Group, has a strong market position in DXS and a broad and deep portfolio. Plan.Net supports clients in developing strategies and operating models, as well as in the design, implementation and operation of commerce and MarTech platforms. The group is increasingly positioning itself as a partner for optimising the entire customer journey. The portfolio includes, amongst other things, customer experience consulting, UX and visual design, as well as CRM, commerce and data platforms. According to its own figures, Plan.Net has around 1,850 employees, 26 international offices and twelve integrated or specialised agencies.

Despite a very challenging market environment, the digital agency managed to grow by 4.3 per cent in Germany in 2025, outperforming many of its competitors in the field of DXS specialists by a significant margin.

In June 2026, the Serviceplan Group announced the establishment of the AI-powered production and content organisation 'MOMENTUM' in partnership with MediaMarktSaturn. In July 2026, Plan.Net Agentic AI was established as an independent business unit. At the same time, Alexander Rohwer was appointed Managing Director of the Plan.Net Group. The extension of 'The Marcom Engine' – the agency model developed for BMW – until the end of 2027, which had already been announced in 2025, further underlines the focus on integrated marketing, communications and production services throughout the entire customer journey.

Valtech continues to hold its place among the market leaders despite a challenging financial year in 2025. The digital agency is strongly implementation-focused, possesses a high level of technological expertise and works with a comprehensive network of relevant platform and technology partners. Its portfolio ranges from experience elevation and commerce, through marketing and performance, to data & AI and enterprise transformation. Valtech is currently positioning itself in particular around the industrialisation and operationalisation of AI. With Valtech One, the company offers a platform-independent AI content accelerator that connects existing systems, data and workflows via APIs and connectors. In addition, Valtech offers further AI accelerators for content production, analytics and predictive modelling in the form of Content OS and Octain.

With 'The Agent Factory', Valtech is expanding this offering to include autonomous AI agents. The Agent Factory is based on Valtech's own IP and provides pre-configured agents that customers can adapt to their specific processes and requirements and further develop. This allows pilot projects to be set up relatively quickly and tested in existing customer environments. The focus is no longer exclusively on the design, implementation or ongoing optimisation of individual services, but increasingly on measurable results achieved through the integration and operation of AI agents.

Conclusion will remain among the market leaders in 2026. Alongside the data and AI specialist Conclusion Intelligence, diva-e Conclusion forms the foundation of the company's presence in the DACH region. As a digital service provider, diva-e supports clients throughout the entire digital value chain, from planning and project management through UX/UI and digital marketing to implementation and operation. The AI Product Advisor developed for ifm demonstrates how this works in AI projects: since June 2026, it has been advising customers in three countries on over 14,000 products.

In November 2025, Conclusion Intelligence acquired GABO, thereby strengthening its expertise in business intelligence and data platforms. Since January 2026, Conclusion Strategies has complemented the portfolio with strategy and implementation services in Benelux, the DACH region and Iberia.

Thanks to its broad technology and sector coverage, as well as its continued growth in DX services this year, **adesso** ranks among the market leaders for digital experience services in Germany. In recent years, the IT service provider has consistently expanded its portfolio from traditional software development and systems integration towards consulting, customer experience, digital commerce, marketing, and data & AI. In doing so, adesso has succeeded in linking these areas more closely together and increasing the uptake of DX services amongst its clients. The double-digit growth in digital experience services underlines this development, as does the significantly higher number of mentions as one of the four most important competitors.

Key elements of adesso's portfolio include the development of digital front-ends and products, the integration of experience and commerce platforms, and services in performance marketing, content creation and customer insights. adesso combines these capabilities with in-depth industry knowledge. Its key focus areas include financial services, insurance, retail, healthcare and the public sector.

With an estimated revenue in Germany of around 2.24 billion euros, **Capgemini** is the largest IT consultancy and systems integration firm in the German market after Accenture. Under the Capgemini Invent brand, the group brings together services in consultancy, innovation, design and transformation. The design and innovation consultancy frog, acquired in 2021, remains a key component of the group's experience and design expertise. With the acquisition of Syniti, completed in 2024, Capgemini has expanded its capabilities in enterprise data management, data migration, data quality and data governance.

Its offering encompasses customer experience, service and product design, digital commerce, data and AI, cloud, and platform implementation. Capgemini has a particularly strong presence in the automotive industry and the public sector, but also works for clients in financial services, consumer goods, manufacturing and other sectors. In the public sector, Capgemini is working with the Federal Ministry for Digitalisation and State Modernisation (BMDS) to develop a modular, AI-powered platform to speed up planning and approval processes for energy and transport projects.

The challengers

IBM combines strategy, design, technology and development for customer and employee experience, as well as digital products, under the IBM iX umbrella. As part of IBM Consulting, IBM iX can draw on hybrid cloud, data & AI, software and managed services, enabling it to support even complex transformation programmes. Currently, the focus is shifting increasingly towards integrating AI into productive business processes. IBM Consulting Advantage and IBM Enterprise Advantage are designed to support hybrid AI platforms and AI-driven transformation in this regard. For the DXS market, IBM is therefore particularly relevant where experience, cloud, data and AI need to be brought together within complex IT landscapes.

In 2025, **valantic** generated revenue of 360.1 million euros in Germany. The company has significantly expanded its portfolio towards AI-enabled customer experience. valantic no longer describes its focus in 2026 solely in terms of implementing commerce and marketing platforms, but also in terms of orchestrating data, content, marketing, service and commerce using agent-based AI.

In the Optimizely ecosystem, for example, valantic is addressing the automation of marketing and commerce processes with AI Agents. Furthermore, new services relating to the discoverability and production of content for AI-driven customer journeys are emerging, including AI visibility & GEO audit, generative video and voice AI, and the valantic AI image studio.

Alongside Deloitte, **PwC** is a major player in the DXS market amongst international consulting and auditing firms. The company combines the services of PwC Consulting and Strategy& with expertise in cloud & digital, customer & commercial excellence, data & AI, generative AI, technology consulting and managed services. Its DXS positioning stems less from that of a traditional digital agency than from the combination of strategy, industry knowledge, CRM, technology and transformation management.

A visible sign of the increased focus on AI-powered customer experiences is the AI Experience Zone, opened in collaboration with Google Cloud at Tower 185 in Frankfurt. The showroom, which opened in November 2025, brings to life a selection from the global portfolio of more than 250 AI agents. The use cases range from automated laboratory processes and customer service to the secure and compliant use of AI.

msg is a technology- and industry-focused IT service provider specialising in insurance, banking, the automotive sector, manufacturing, retail and public administration. Its portfolio ranges from consultancy and off-the-shelf software, through bespoke software development and SAP, to cloud, data & AI, cyber security and managed services. In the DXS environment, msg combines these capabilities with customer experience, front-end development and digital business models – including via msg digital and the digital agency Digital Seals.

In terms of revenue from digital experience services, msg is one of the largest service providers in Germany in this segment. msg has a particularly strong presence in the banking and insurance sectors with its digital experience services. However, msg is also continuing to grow steadily in the industrial sector and public administration.

In the public sector, **init** is a leading provider of administrative digitalisation and is one of the DXS specialists in the portfolio. The company supports federal ministries, public authorities and other public organisations in the development of digital administrative services. Its range of services extends from consultancy and conceptualisation through to design, implementation and the operation of digital platforms. A key development is the legal merger of init AG für digitale Kommunikation and HBSN GmbH with effect from 31 July 2026. HBSN had been fully acquired in January 2025 and brings additional expertise as well as around 450 active clients from the healthcare sector. This strengthens init's position in a regulated and highly digitalised market segment.

Since 2024, **Digitas** has been consolidating the former operations of Digitas Pixelpark in Germany under a single global brand. The company, which is part of the Publicis Groupe, combines creative experiences, media, CRM & loyalty, social transformation and commerce with data and technology expertise. Digitas AI supports the development and management of agents to deliver brand-safe, customer-centric experiences. The Publicis platform CoreAI provides the overarching data and technology framework for this.

Syzygy is a digital agency group specialising in experience design, UX/UI, digital platforms, performance marketing and technological implementation. The group works in particular for clients in the automotive, financial services, mobility and other sectors with complex digital customer relationships. Its DXS profile ranges from strategy and creation, through content and media, to the development and optimisation of digital products, services and commerce platforms. Syzygy is currently aligning its business model with AI-powered services and agentic systems. New projects, such as the digital platform and customer portal for Energie AG Oberösterreich, as well as the UX/UI project for the Rhein-Main Transport Association, demonstrate that Syzygy is applying its experience expertise beyond traditional brand communication.

The challengers

As a Volkswagen subsidiary, **Diconium** specialises in digital business models and commerce. The provider combines digital advisory, product engineering, data & AI and cyber security with the development of commerce and sales platforms as well as digital products. Its particular strength lies in the automotive and mobility sectors: Diconium works on digital ecosystems, software-defined products and the connection between vehicles, customers and sales. In addition, the company serves sectors including manufacturing, retail, consumer goods and financial services.

Telekom MMS is shifting the focus of its DXS offering from platform implementation to the productive use of Agentic AI. With the n8n-based T-AI Agent Platform, the company supports the integration of AI agents into email, CRM and ERP processes. Telekom MMS provides support throughout the process, from use case selection and consultancy to development and integration. The partnership with Parloa expands the offering to include multilingual and omnichannel-enabled customer communication with CRM and ERP integration.

Infosys is featured in the portfolio for the first time this year. The Indian IT services provider combines global delivery capabilities with consulting, software engineering, cloud, data and AI, as well as a standalone digital experience business. Infosys Digital Experience encompasses digital marketing, digital commerce and digital interactions. According to the company, more than 14,000 digital practitioners work in this area; in addition, there are more than 20 digital studios and a global client portfolio. With Infosys Aster, the company has an AI-powered marketing suite designed to combine data, content, automation and personalisation. The portfolio is complemented by partnerships with Adobe, Salesforce, SAP, Sitecore, commercetools and other technology providers.

Exxeta is a technology-focused consultancy and engineering partner for complex and regulated organisations. Its key focus areas are mobility, energy, financial services and the public sector. Its portfolio combines strategy & AI, data & analytics, cloud, software engineering and digital platforms. In the field of customer experience, Exxeta supports companies from the ideation stage right through to the implementation of digital solutions. The focus is on a holistic view of the customer journey, data- and feedback-based validation, user research, UX/UI design, testing, and accessible and scalable designs. In addition, Exxeta utilises AI-powered personalisation and data-driven insights to tailor digital experiences more closely to the needs of end users.

team neusta rounds off the field of challengers. The key development at team neusta is the acquisition of a majority stake by CONTACT Software at the turn of the year. Both companies are working on a joint reorientation with a focus on AI-driven transformation, digital sovereignty and a unified market presence. team neusta contributes expertise in bespoke IT solutions, e-commerce, logistics and tourism. CONTACT complements this portfolio with industrial software, product development and European data and AI infrastructures.

Lünendonk sub-ranking of service providers focusing on digital experience

The Lünendonk List of the 25 leading providers of digital experience services primarily comprises large, diversified consultancy and IT service providers in the first half of the year, based on the ranking criterion of 'total revenue in Germany'. Whilst digital experience services are an important part of these companies' portfolios, they do not constitute the main focus of their business activities.

To provide a transparent picture of which service providers focus on digital experience services, Lünendonk has again this year conducted a sub-ranking to identify those service providers that generate at least 75 per cent of their revenue from digital experience services.

Thirteen service providers – measured by their total revenue in Germany – were included in the sub-ranking. As in the previous year, the Plan.Net Group took first place, followed by Telekom MMS. The next places are also occupied by init, Diconium and Exxeta, as in 2025. Conclusion, which was still in 8th place in 2025, managed to climb two places this year. Behind Valtech and team neusta in 7th and 8th place respectively, Digitas comes in 9th. Places 10 to 13 are occupied by Syzygy, Merkle, MAI and port-neo.

Lünendonk® sub-ranking 2026: Leading DXS specialists in Germany

Rank	Company	Revenue in 2025 in millions of euros in Germany
1	Plan.Net Germany GmbH & Co. KG, Munich 1)	258.8
2	Deutsche Telekom MMS GmbH, Dresden	257.0
3	]init[AG für digitale Kommunikation, Berlin 2)	214.8
4	Diconium Group GmbH, Stuttgart	176.0
5	Exxeta AG, Karlsruhe	133.0
6	Conclusion DACH GmbH, Munich	101.3
7	Valtech GmbH, Düsseldorf	84.6
8	team neusta SE, Bremen 2) 3)	76.2
9	Digitas GmbH, Hamburg	54.5
10	Syzygy AG, Bad Homburg	46.1
11	Merkle Germany GmbH, Frankfurt 1)	36.9
12	MAI Marketing Automation Intelligence GmbH, Hamburg	29.2
13	port-neo Group GmbH, Stuttgart	10.7

Inclusion criteria for the sub-ranking:

Companies that generate at least 75 per cent of their revenue from digital experience services and generate a significant share of revenue in all three sub-areas are included in the sub-ranking.

Note:

The sub-ranking does not claim to be exhaustive, but merely represents a sub-ranking based on the list of participants.

Footnotes:

1) Revenue represents fee income.
2) Figures for 2025 include acquisitions.
3) Figures for 2025 include disposals.

Fig. 25: Lünendonk® sub-ranking 2026: "Leading DXS specialists in Germany"

Developments & trends on the DXS market

The technology agenda for digital experience is broadening in the age of AI, and CMOs and CSOs must increasingly address the question of how digital technologies are transforming the customer journey and what implications this has for their operating models. It is clear that companies want to use digital technologies to create personalised and increasingly automated customer experiences.

An analysis of technology trends for the coming years shows that the companies surveyed are initially focusing on the necessary foundations: modernising their technology platforms, building a comprehensive AI stack, integrating data, and establishing data and AI governance, compliance and risk processes, as well as AI security.

Customer data, security and hyper-personalisation are leading the technology agenda

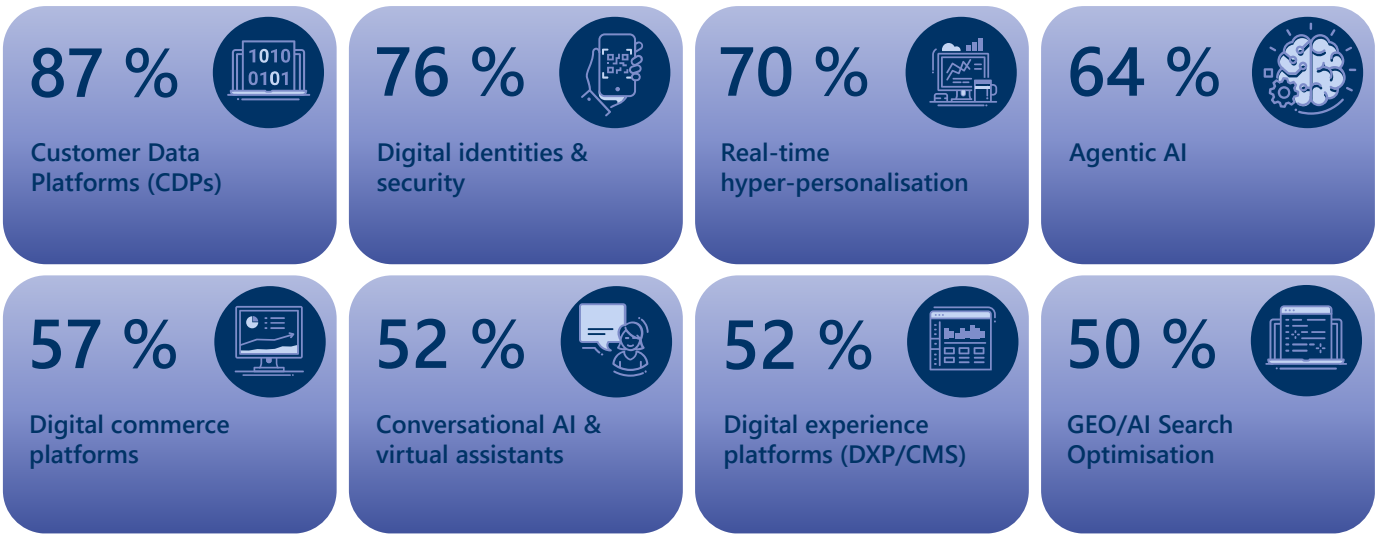


Fig. 26: How would you rate the relevance of the following technologies to your company over the next two years?; scale from 1 = 'no relevance' to 4 = 'very high relevance'; the responses shown refer to 'somewhat high relevance' and 'very high relevance'; relative frequency distribution; all companies; n = 135-140

Customer Data Platforms form the foundation

Customer Data Platforms (CDPs) lead the technology agenda by a clear margin. 87 per cent of the user organisations surveyed consider them to be of high or very high relevance over the next two years. CDPs consolidate customer data from various sources, standardise it and make it centrally available to marketing, sales and customer service.

In doing so, they lay the groundwork for consistent customer profiles and personalised interactions across various touchpoints. A high-performing digital experience is not created by individual applications or channels. The key factor is whether companies can integrate data from different functional silos and utilise it to manage the entire customer journey.

Security is becoming an integral part of the customer experience

Digital identities and security rank second on the technology agenda, at 76 per cent. Digital identities enable the unique identification of individuals, organisations and devices. Security protects identities, data and systems from unauthorised access and cyber-attacks.

For end-user organisations, security is therefore not merely a technical control function. It is becoming a prerequisite for trustworthy interactions, secure transactions and personalised services. The more companies utilise customer data and automated systems, the more closely the customer experience, data protection and security architecture become intertwined.

Hyper-personalisation and agentic AI build on these foundations

70 per cent of the companies surveyed consider real-time hyper-personalisation to be highly or very highly relevant. Customers increasingly expect content, offers and services that are tailored to their specific situation, interests and context. AI and the growing availability of customer data create the technical conditions for this.

AI agents, or 'Agentic AI', are also considered highly relevant, at 64 per cent. They can, for example, provide product recommendations, handle customer enquiries or guide users through complex processes. The next step in development involves the collaboration of several specialised agents. This simultaneously increases the demands on governance, data quality and human oversight.

The order of the technology agenda is therefore revealing: companies prioritise data, platforms and security first. Personalisation, automation and agent-based interaction build on this foundation. The relevance of specific AI applications cannot therefore be assessed in isolation from the underlying technological and organisational foundations.

Platforms remain important – new search logics are emerging

Digital commerce platforms achieve a relevance rating of 57 per cent. They form the technical foundation for digital sales processes and must increasingly be linked to customer, product and interaction data. Conversational AI and virtual assistants, as well as digital experience platforms and content management systems, follow with 52 per cent each.

GEO and AI search optimisation each reach 50 per cent. Companies are beginning to optimise their content not only for traditional search engines, but also for AI-powered search and recommendation systems. Although this figure is lower than that for the fundamental data, platform and security issues, it shows that companies are already grappling with changing search and interaction logic.

For businesses, this shifts the focus of digital visibility. In future, it will not simply be a matter of ranking highly in traditional search results. Content must also be relevant, comprehensible and trustworthy for AI-powered search and recommendation systems. To achieve this, businesses need structured content, reliable data and verifiable sources.

DX investment priorities

The previous chapter highlights the technologies that will shape the digital experience agenda in the coming years. User companies' investment plans now reveal how this agenda is being implemented: budgets are initially being channelled into the stable operation, further development and integration of digital platforms. Visible individual measures such as content, campaigns or commerce are not the top priority.

Platform operations and customer experience lead the agenda

77 per cent of the companies surveyed plan to make significant or very significant investments in managed services and the hosting of customer-centric platforms over the next two years. Customer experience follows closely behind at 75 per cent.

The high priority given to platform operations is plausible against the backdrop of the increasing digitalisation of marketing, sales and customer service. The more companies use digital applications in customer-related processes, the more important their reliable operation, sufficient availability and the protection of data and digital identities become. For platforms on which personal data is processed, the requirements for data protection, IT security and reliability are also increasing.

Data, activation and integration form the next investment area

61 per cent of companies plan to make significant or very significant investments in data & AI, advertising & performance, and the integration of digital experience platforms with back-end systems. These three areas represent different but closely linked requirements: companies must make better use of customer data, manage digital activities in a more measurable way, and connect front-end applications more closely with central enterprise systems.

This shifts the focus from isolated digital measures towards integrated operational and process models. Personalisation and data-driven activation require a robust data foundation. At the same time, consistent customer journeys can only be delivered if digital experience platforms are connected to systems such as CRM, ERP or other back-end applications.

Experience remains relevant – commerce is integrated into the overall architecture

UX architecture & design also achieves a high figure of 56 per cent. The employee experience follows with 52 per cent. The findings show that the investment agenda is not focused exclusively on external customers. Companies must also support their own employees with suitable digital applications, data access and processes.

Furthermore, 49 per cent are planning significant or very significant investment in content & campaigns. For digital commerce – including platform development and optimisation – the figure stands at 42 per cent. This comparatively lower figure does not imply that digital commerce is of lesser relevance. Rather, it shows that, compared to operations, integration, data and customer experience, commerce investments are less frequently given particularly high priority. The results therefore point towards a stronger integration of commerce into an integrated digital experience and enterprise architecture.

Overall, budget planning follows a clear logic: companies first create the conditions for stable, secure and integrated operations. Data-driven activation, personalisation, content and campaign processes, as well as the further development of commerce applications, are then built upon this foundation.

Digital experience budgets are growing – particularly for managed services and customer experience

Proportion of companies intending to increase their budgets significantly or very significantly in the following areas

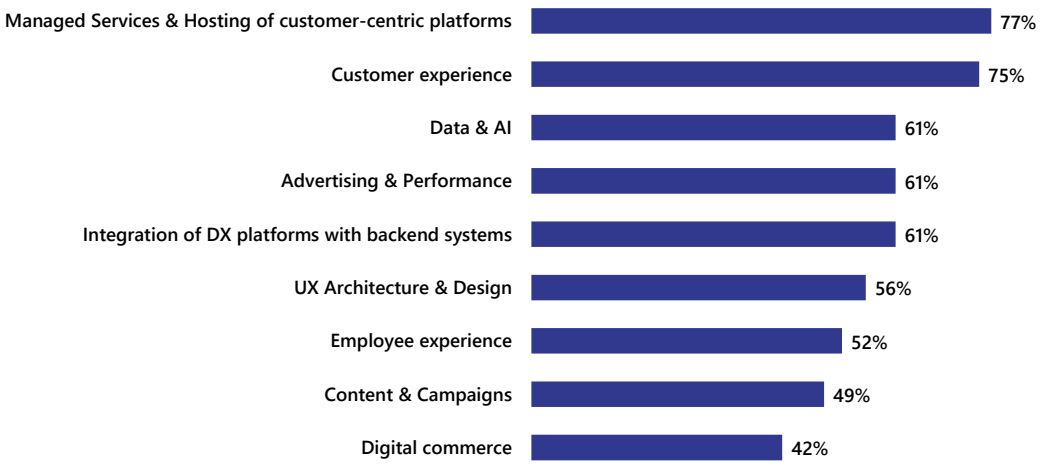


Fig. 27: How will your company's total expenditure on digital experience develop over the next two years?; relative frequency distribution; all companies; n = 137
In which of the following areas will your company's budget for digital experience be allocated over the next two years?; scale from 1 = 'no investment' to 4 = 'very significant investment'; responses shown refer to 'somewhat significant investment' and 'very significant investment'; relative frequency distribution; all companies; n = 134-140

The customer journey as an end-to-end task: orchestration rather than silos

The investment priorities outlined in the previous chapter show that end-user companies are investing primarily in platform operations, data, integration and customer experience. The crucial question now is to what extent these technical and organisational foundations have already been translated into end-to-end management of the customer journey.

Customers have long since taken it for granted that they can switch between digital and analogue channels. They gather information on websites and via search engines, find inspiration through social media or AI-powered applications, make purchases online or in physical shops, and subsequently expect a consistent service. The customer journey is not linear. It consists of many interactions that influence one another. For businesses, this means that data, systems, decisions and channels must work together seamlessly throughout the entire journey.

In practice, however, marketing, sales, commerce and service departments often still work with different applications, data sets and target systems. This results in disconnects in the customer relationship. Customer data is maintained multiple times, interactions are not recognised across channels, and content is not delivered consistently. The key challenge therefore does not lie in the introduction of individual platforms. What is crucial is their orchestration across cross-functional processes.

End-to-end is established, but not yet the norm

Only 10 per cent of the companies surveyed already manage their customer journeys entirely via cross-functional end-to-end processes. A further 47 per cent report partial coverage through E2E services. Overall, 57 per cent of companies therefore have at least partial or full E2E management in place.

However, there is still a considerable amount of ground to make up: 30 per cent of companies have not yet implemented cross-functional management, but are planning to do so. A further 13 per cent have neither implemented it nor put it on their agenda. For a total of 43 per cent of companies, the end-to-end orchestration of the customer journey is therefore still pending.

There are differences between B2C and B2B companies. In the B2C sector, 59 per cent report that the customer journey is partially covered. Among companies with a B2B focus, this figure stands at 32 per cent. The higher level of implementation in the B2C environment is consistent with the greater number of cross-channel interactions and standardised transaction and service processes. However, no clear causal relationship can be deduced from the data.

Customer journeys are increasingly being interconnected and mapped as end-to-end processes – B2B is lagging behind

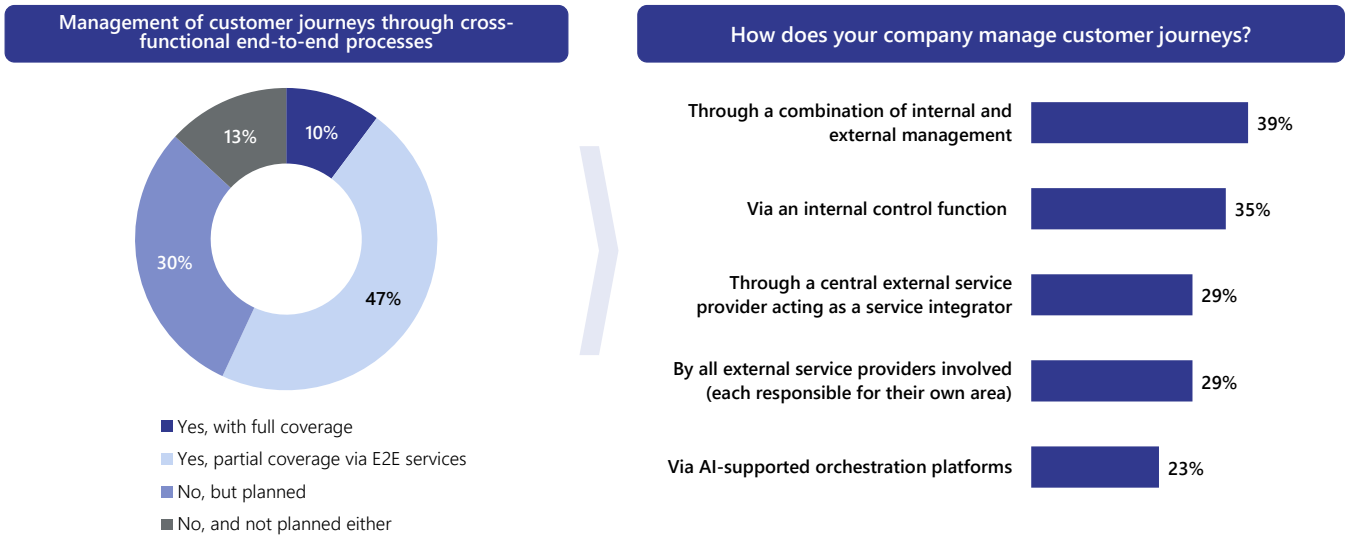


Fig. 28: Are customer journeys in your organisation managed through cross-functional end-to-end processes?; relative frequency distribution; all companies; n = 137
How are customer journeys managed in your organisation?; scale from 1 = 'never' to 4 = 'always'; responses shown refer to 'frequently' and 'always'; relative frequency distribution; all companies; n = 74-76

Hybrid operating models characterise implementation

Even amongst companies that already manage their customer journeys on a cross-functional basis, there is no uniform operating model. Management most frequently takes the form of a combination of internal and external resources: 39 per cent of respondents state that they manage their customer-related processes frequently or always in this way. 35 per cent rely on an internal management function.

External service providers also play an important role. 29 per cent each manage their customer journeys frequently or always via a central external service provider acting as a service integrator, or via several specialised service providers. 23 per cent are already using AI-supported orchestration platforms for this purpose.

The results show that end-to-end management is not primarily implemented by a single platform or a single service provider. Rather, a hybrid model is emerging, comprising internal management functions, specialised external partners and automated orchestration platforms. For client organisations, this means that clear responsibilities for data, processes, quality and orchestration are becoming increasingly important. For DXS service providers, there is a growing demand not only to deliver individual services, but also to integrate and manage the interfaces between the disciplines involved.

Different sectors show varying levels of maturity

Differences are also evident when comparing sectors. In the insurance sector, 25 per cent of companies report full coverage of the customer journey through cross-functional end-to-end (E2E) processes, whilst 63 per cent report partial coverage. This means the sector has the highest level of implementation in this comparison.

In the retail and consumer goods sectors, a large proportion of companies are either in the partial implementation phase or at the planning stage. In the manufacturing sector, 37 per cent have neither implemented cross-functional management of their customer journey nor put it on the agenda.

DX projects originate from several business areas

The provider perspective confirms that digital experience projects no longer originate exclusively from marketing. 80 per cent of the DXS service providers surveyed frequently or very frequently receive project enquiries from marketing. IT follows with 76 per cent. Sales (71 %), customer care and after-sales services (66 %) and operations (57 %) are also significant areas of origin.

Demand is therefore spread across several business functions. Depending on the starting point, this may involve optimising customer interaction, integrating systems, further developing digital sales channels or improving service processes. As a result, end-to-end management of the customer journey is increasingly becoming a cross-functional transformation task.

Project enquiries usually come from Marketing, but IT and other departments are also relevant

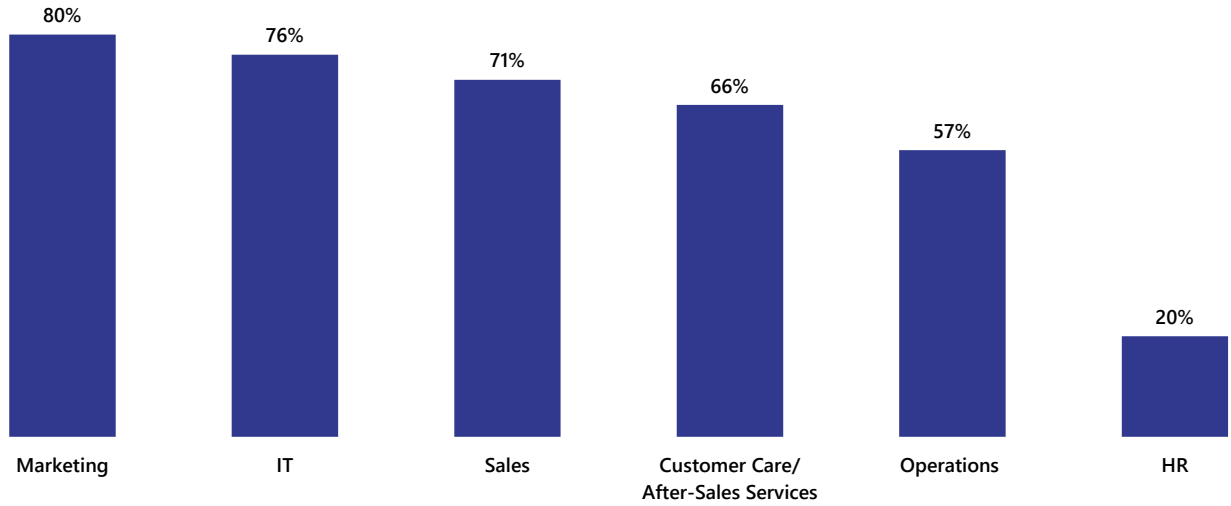


Fig. 29: From which departments do you receive project enquiries from customers?; scale from 1 = 'never' to 4 = 'very frequently'; the responses shown refer to 'frequently' and 'very frequently'; relative frequency distribution; all companies; n = 20

AI is transforming the customer journey – but autonomous management is still in its infancy

Although the customer journey is increasingly supported by data and algorithms, in practice cross-functional management is not yet fully established in many organisations. AI can accelerate this development if organisations work consistently to build their AI maturity.

Only 3 per cent of the companies surveyed are already using generative AI to manage their customer journeys. A further 32 per cent are planning to do so. For AI agent systems, the proportion currently in use stands at 34 per cent, a similar level. A further 36 per cent are planning to implement them.

This means that for around two-thirds of companies in each case, AI is either already a current focus or is being specifically planned. However, it is not yet in widespread use: 35 per cent do not currently use generative AI to manage their customer journeys. For AI agent systems, this figure stands at 29 per cent.

The results thus paint a mixed picture. AI has become an established topic within companies. However, its productive use is still concentrated on individual applications and use cases. It is therefore not yet possible to speak of end-to-end algorithmic or autonomous management of the customer journey.

A mixed picture: Generative AI and AI agent systems are not yet in widespread use across the customer journey

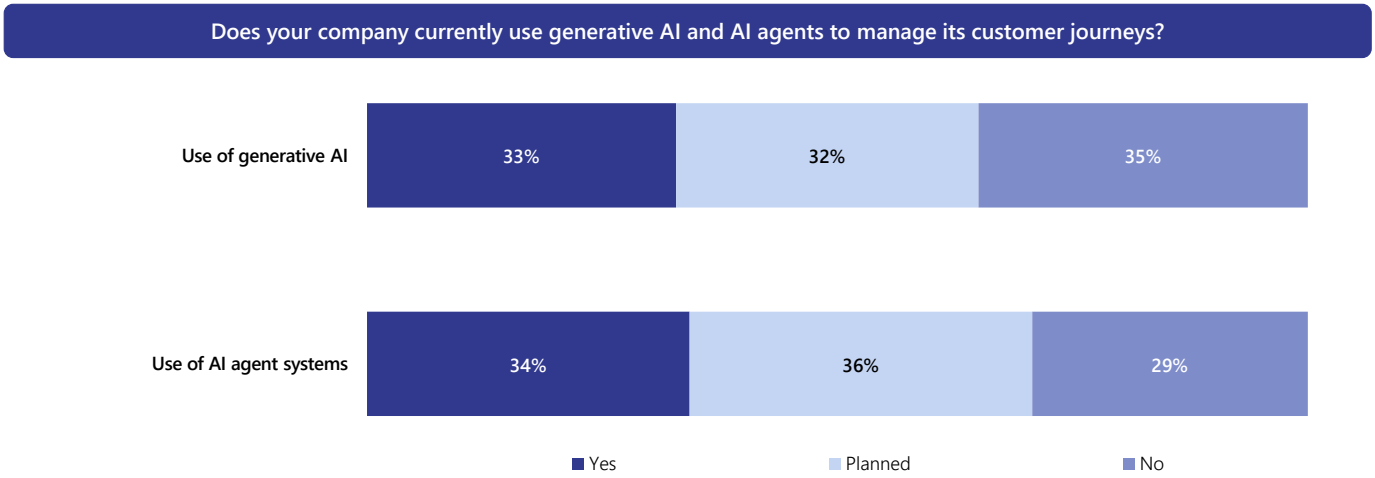


Fig. 30: Does your company currently use generative AI and AI agent systems to manage its customer journeys?; relative frequency distribution; all companies; n = 140

Expectations: AI is initially intended to improve interactions

Expectations regarding more AI-based control are primarily focused on customer interaction. 68 per cent of the companies surveyed hope to achieve a proactive approach to customer engagement. 66 per cent expect a reduction in drop-off rates within the customer journey.

AI is thus intended to reach customers earlier, in a more targeted manner and with more relevant information, whilst reducing drop-offs and interruptions in the journey. 57 per cent expect to be able to use AI to generate and deliver personalised content tailored to specific target groups. 56 per cent associate the use of AI with an improvement in the product and service experience.

Economic objectives follow: 48 per cent anticipate cost reductions through efficiency gains. 42 per cent each expect greater customer loyalty as well as the implementation of real-time campaigns and real-time pricing. 40 per cent also see the opportunity to reduce their dependence on external service providers and agencies.

The results thus reveal a clear priority: companies initially expect AI to enable a better response to customer needs and a more efficient design of existing interactions. The economic benefits are expected to arise primarily through higher conversion rates, lower abandonment rates and better processes overall. However, greater data and AI maturity is required to tap into further potential, such as real-time campaigns or real-time pricing.

Benefits of AI-based customer journeys: Proactive engagement and fewer drop-offs to optimise conversion rates

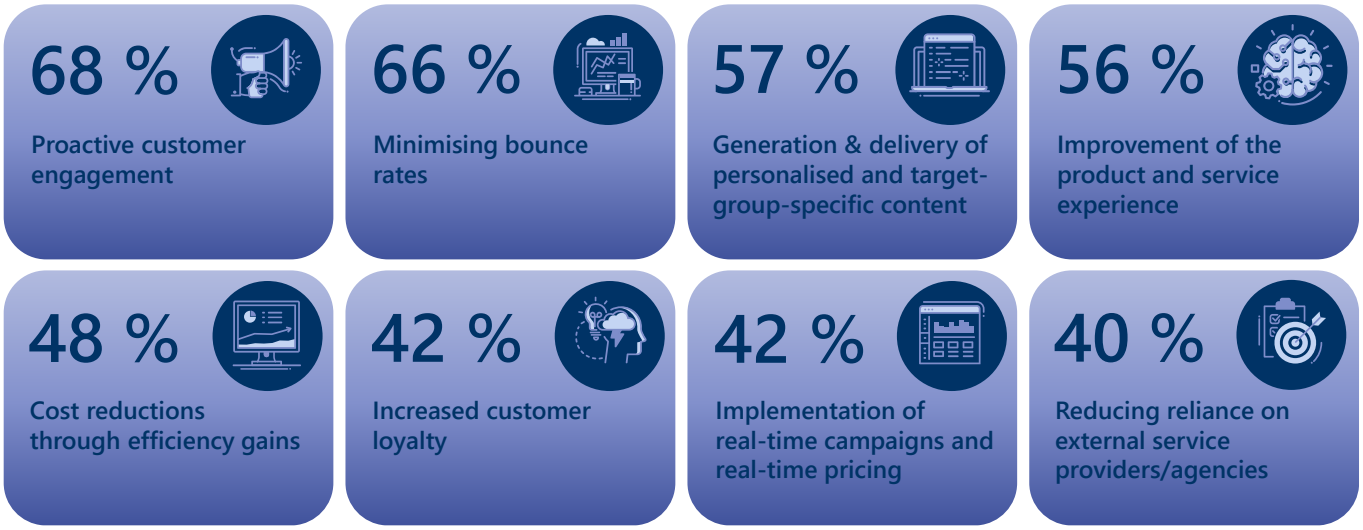


Fig. 31: What benefits do you expect for your company from greater AI-based management of customer journeys?; scale from 1 = 'not at all' to 4 = 'very strongly'; answers shown refer to 'somewhat strongly' and 'very strongly'; relative frequency distribution; all companies; n = 137

AI agents are being deployed in clearly defined use cases

A look at the specific areas of application shows that companies are initially deploying AI agents in clearly defined use cases. The most widespread productive use is in conversational AI and chatbots: 42 per cent are already using AI agents productively in these areas. A further 27 per cent are in pilot or test phase, whilst 19 per cent are planning to deploy them. Dialogue-oriented applications are thus the most developed area of application to date.

Companies are also already gaining experience in automated content creation and campaign management, as well as in customer data analysis and segmentation. In both areas, 23 per cent are using AI agents in production. A further 39 per cent are testing relevant applications for content creation and campaign management, whilst 37 per cent are doing so for customer data analysis and segmentation. In addition, 24 per cent and 29 per cent respectively are planning to implement them.

AI agents are therefore initially being deployed where clearly definable tasks can be automated, content created or data analysed. These applications can be integrated relatively straightforwardly with existing processes, approval workflows and control points.

AI is initially transforming the customer journey through individual applications. Dialogue, content creation and data analysis are already more widespread. Comprehensive journey optimisation, proactive service processes and agentic commerce, on the other hand, are still in their infancy. The next step in development therefore does not consist solely of introducing further AI agents. The crucial factor is whether companies integrate data, systems, processes and responsibilities in such a way that AI can, in future, coordinate multiple interactions and process steps along the customer journey. Autonomous control thus remains a prospect – the prerequisites for this are only just being established.

AI agents are already being used in dialogue and data processing – autonomous commerce applications are still in their infancy

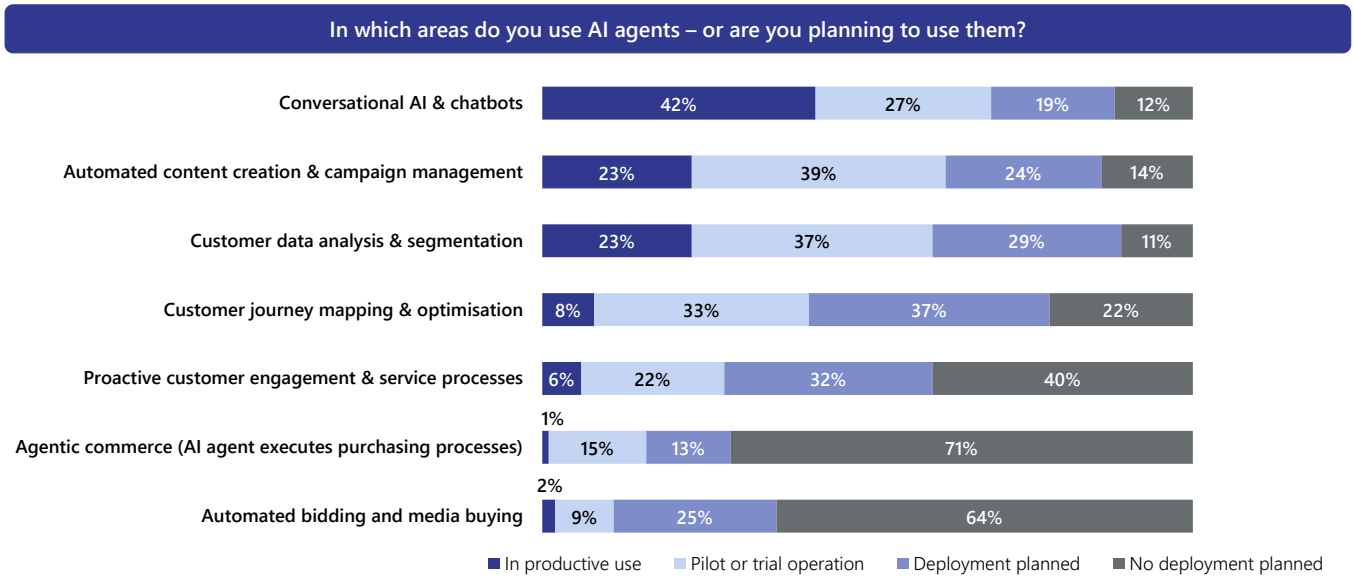


Fig. 32: In which areas do you use AI agents – or are you planning to use them?; scale from 1 = 'no plans to use' to 4 = 'already in productive use'; relative frequency distribution; all companies; n = 138

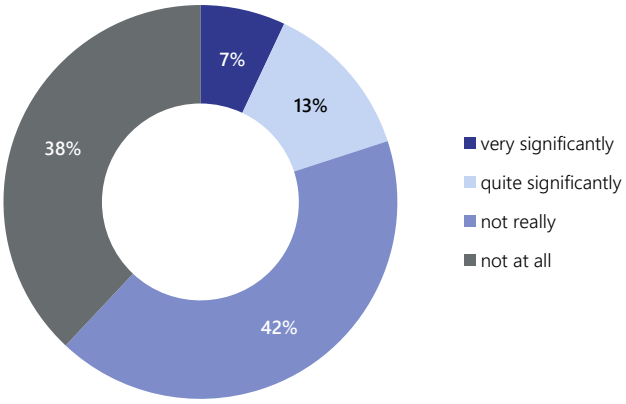
GEO and AI-powered search: visibility becomes a question of data and content

For many users, traditional web search has long been a key entry point into the customer journey – dominated by search engines and, in particular, by Google. However, generative response systems are changing more than just the presentation of search results. Users are increasingly receiving directly formulated answers, recommendations and summaries.

This also shifts the key question for businesses: it is no longer simply whether content appears in a list of results, but whether a company, a brand or a product is included in an AI-generated response.

AI search systems have so far had a noticeable impact on marketing and sales strategies in only 7 per cent of companies – GEO strategies are rare

To what extent do changes in search behaviour caused by AI systems affect your marketing and sales strategies?



Has your company developed a dedicated strategy for Generative Engine Optimisation (GEO)?

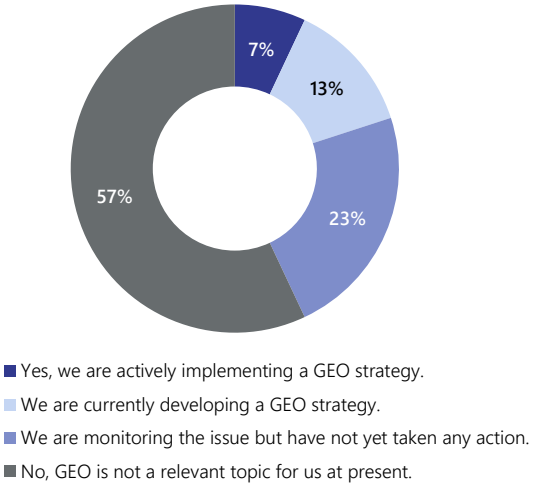


Fig. 33: To what extent does the change in search behaviour driven by AI systems (Google AI Overviews, ChatGPT Search, Perplexity) affect your marketing and sales strategies?; relative frequency distribution; all companies; n = 137
Has your company developed a dedicated strategy for Generative Engine Optimisation (GEO) – i. e. measures to ensure visibility in AI-generated search results?; relative frequency distribution; all companies; n = 137

However, the strategic significance of this development has not yet been fully recognised across the board within companies. Only 20 per cent of the companies surveyed state that the change in search behaviour brought about by AI systems is already having a significant or very significant impact on their marketing and sales strategies. 42 per cent currently see a rather minor impact, whilst a further 38 per cent see none at all. There is therefore a clear gap between technological development and its strategic implementation within companies.

GEO is not yet a strategic priority in most companies

Generative Engine Optimisation (GEO) refers to the targeted optimisation of content for new search environments and generative response systems. Unlike traditional search engine optimisation, it is not solely about achieving a good ranking in search results. Rather, the decisive factor is whether content is recognised as a relevant, trustworthy and authoritative source within automatically generated responses.

To achieve this, companies must present content in a clear, precise and context-relevant manner, whilst clearly demonstrating expertise, data and sources. GEO therefore affects not only search engine optimisation, but also content strategy, data quality and the structure of digital content.

However, implementation of GEO is still in its infancy. 7 per cent of the companies surveyed are actively implementing a GEO strategy. A further 13 per cent are currently developing such a strategy. 23 per cent are monitoring the issue but have not yet taken any action. 57 per cent do not currently have GEO on their agenda.

The results thus show that, so far, only a limited number of companies have translated the changing search environment into a standalone strategic response. Companies with a higher level of AI maturity tend to be more aware of changes in search behaviour. This may be linked to their greater technological experience. However, it is equally plausible that brand-focused companies monitor their visibility and perception on digital channels particularly closely and therefore address the implications of generative search systems and GEO at an earlier stage. The available data does not allow for a clear distinction between these influencing factors.

Campaigns and branding drive the initial responses

The measures planned or already implemented by companies initially focus on communication and brand perception. 43 per cent are designing their campaigns so that they can be processed by AI agents and perceived by humans. A further 40 per cent are investing more heavily in branding.

In doing so, companies are initially responding to the immediately visible changes brought about by AI-powered search. Content should be relevant, comprehensible and compatible for both humans and AI systems. This adaptation therefore concerns not only the discoverability of individual pieces of content, but also the question of how brands appear in automatically generated answers and recommendations.

25 per cent are shifting from a persona-oriented approach to a behaviour- and data-based definition of target audiences. 24 per cent are investing in the AI-supported automation of customer journeys. This means that data-based target audience models and automated interactions are also on the agenda.

The pattern is clear: the initial responses are primarily at the level of communication, brand management, target audience engagement and customer interaction. GEO is thus initially viewed as an extension of existing marketing and campaign work.

Content architectures and GEO tools remain a secondary priority

Measures aimed at addressing the structural requirements of AI-powered search are significantly less widespread. 14 per cent are establishing structured and machine-readable content architectures for AI agents. 13 per cent are increasingly replacing traditional campaign planning with continuous, data-driven, optimised campaigns. Only 10 per cent are investing in GEO/AIO tools and the relevant specialist expertise.

This highlights a typical tension: companies are already adapting their campaigns and brand communication to the changing search environment. However, they are less likely to invest in the data and content structures required for sustainable visibility in generative response systems.

GEO therefore remains, for the time being, primarily a communication and branding issue. The technical and organisational infrastructure underpinning it, by contrast, is still in its infancy. A robust GEO strategy must, however, go beyond the adaptation of individual campaigns. It requires structured content, traceable sources, consistent data and clear accountability for the quality of the information.

Further development will depend on whether companies treat GEO as an isolated online marketing measure or integrate it into their broader content, data and customer experience strategy. It is only through this integration that the adaptation of individual pieces of content can lead to a lasting, robust presence in AI-powered search and response systems.

Companies are initially responding to AI-powered search with AI-compatible campaigns and stronger branding

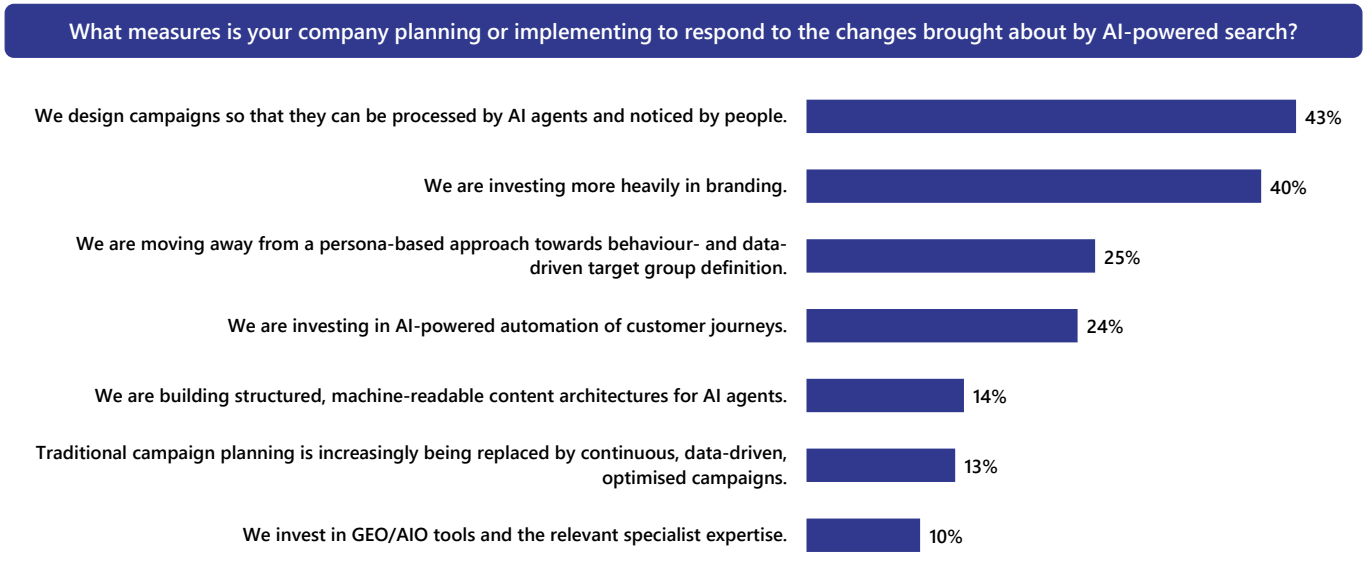


Fig. 34: What measures is your company planning or implementing to respond to the changes brought about by AI-powered search?; multiple answers allowed; relative frequency distribution; all companies; n = 130

Conclusion and outlook

The market for digital experience services is at a turning point. Demand for digital customer experiences is rising, whilst at the same time artificial intelligence, new search logics and integrated platform architectures are transforming the fundamentals of service delivery. Digital experience is increasingly becoming a cross-functional task that links marketing, IT, sales, commerce, customer service and operations. For client organisations, therefore, it is no longer just about individual digital initiatives, but about the ability to integrate and continuously develop customer data, content, technologies and processes throughout the entire customer journey.

What will be on the minds of CIOs and other decision-makers in the coming years?

The priorities of the end-user organisations surveyed show that AI transformation does not begin with individual applications, but with the organisational and technological foundations.

- **Data landscape and first-party data:** 69 per cent of companies intend to improve their data landscape over the next two years. 30 per cent regard the development of a standalone first-party data strategy as particularly important, whilst 27 per cent plan to invest in the technical data infrastructure. Without consistent, up-to-date customer data that is available across all systems, personalisation, AI agents and automated customer journeys will remain limited to individual use cases.
- **AI expertise and governance:** 60 per cent plan to build up in-house AI expertise. 56 per cent prioritise AI governance, compliance and preparation for the EU AI Act. Companies must therefore clarify which data and content may be used by AI systems, how results are monitored, and who is responsible for quality, security and compliance.
- **AI agents and customer journey orchestration:** 54 per cent intend to implement and scale AI agents. 43 per cent plan to optimise customer journey and experience orchestration. However, productive use is still limited: only 3 per cent are already using generative AI to manage their customer journeys. Current adoption of AI agent systems stands at 34 per cent, with a further 36 per cent planning to implement such applications.
- **Digital experience and platform operations:** 79 per cent of companies intend to increase their spending on digital experience. 77 per cent plan to make significant or very significant investments in managed services and the hosting of customer-centric platforms, whilst 75 per cent plan to invest in customer experience. The investment agenda thus focuses not only on visible front-ends and campaigns, but also on stable operations, integration, security and continuous development.

- **GEO and AI-powered search:** 50 per cent regard GEO or AI search optimisation as a relevant technology trend. 44 per cent want to improve visibility in AI-powered search systems. In future, content must be comprehensible, structured and trustworthy not only for traditional search engines, but also for generative response and recommendation systems . Visibility thus becomes a question of data and content.

What do these changing requirements mean for collaboration with IT service providers?

The requirements placed on external partners are changing in parallel with the technological and organisational development of client companies. Digital experience projects are increasingly being procured via the IT procurement function: 73 per cent of companies frequently or always commission DXS service providers through this function. It is therefore no longer sufficient for providers to demonstrate their expertise to marketing and creative teams.

- **Integration rather than isolated services:** Service providers must link strategy, creative work, data, platforms, technology and operations. Their value proposition increasingly lies in establishing, operating and continuously optimising integrated marketing processes.
- **AI-native delivery rather than individual use cases:** 43 per cent of client organisations expect AI-native delivery models, with measurable efficiency and quality benefits, to become increasingly important in future. What is required are not just AI tools or pilot projects, but robust operating models in which AI is integrated into processes, roles, quality assurance and management.
- **Demonstrable governance and outcomes:** 55 per cent look for transparent AI security, compliance and data concepts when selecting DXS service providers. 52 per cent take certifications and evidence of AI governance into account. 50 per cent each expect evidence of successfully implemented AI projects, as well as proof-of-concepts and pilot projects. At the same time, measurable business outcomes are becoming more important than mere output or activity metrics.

What are IT and DXS service providers focusing on?

For providers, this development brings with it a twofold pressure to adapt: on the one hand, they must realise efficiency gains through AI; on the other, they must build up new capabilities in data, governance, integration and strategic management.

- **Automation of delivery:** In content and media production, the share of AI in delivery is set to rise from 33.3 per cent in 2026 to 54.7 per cent in 2028. In data, analytics and consumer insights, an increase from 28.3 per cent to 48.0 per cent is expected. Digital marketing and campaign services, as well as technology infrastructure and integration, are also increasingly being delivered with AI support.
- **Changes in staffing requirements:** 55 per cent of DXS service providers expect their staffing requirements to fall over the next three years. At the same time, there is a growing need for new skills in data quality, AI governance, model management, system integration and the orchestration of complex customer journeys.

- **Shift towards technology and integration:** 48.7 per cent of the revenue generated by the providers surveyed comes from Digital Technology Services. Digital Consulting Services account for 30.8 per cent of revenue, whilst Digital Agency Services account for 20.5 per cent. Technology is therefore the economic focus of the DXS market.
- **Divergent growth prospects:** The 23 providers surveyed increased their revenue from digital experience services by an average of 2.0 per cent in 2025. Whilst DXS specialists recorded a 1.1 per cent decline in revenue, DXS generalists grew by 7.3 per cent. For 2026, specialists expect an average growth of 1.1 per cent, whilst generalists expect 9.3 per cent.

The figures do not suggest that agency services are set to disappear. Rather, they show that their scope and delivery model are changing. Standardisable services are being automated, whilst strategic, technological and integration tasks are gaining in importance. Digital agencies must therefore continue to deepen their expertise in IT architecture, data, platforms and governance, without relinquishing their strengths in branding, creativity and customer understanding.

The key development will lie in whether DXS service providers evolve from execution-focused service providers into integrators and orchestrators. Their role in future will be to bring together internal marketing and IT teams, data, platforms, AI agents and other external partners within a high-performing operating model. This is particularly evident in the content supply chain: automated text, image or video production only generates sustainable value when customer data, rights, approvals, brand guidelines, activation and performance measurement are all linked together.

The next stage in the evolution of the digital experience is therefore neither a single tool nor an isolated AI use case. It is an integrated system comprising data, technology, processes and responsibilities. Companies that establish these connections can gradually personalise, automate and orchestrate their customer journeys to a greater extent. Providers wishing to keep pace with this development must also consistently refine their own delivery capabilities. The winners in the DXS market will not be those who simply produce more content or launch further AI pilot projects. The decisive factor will be who can reliably generate better customer experiences and measurable business results from data, technology and creativity.

Afterword

Such a comprehensive survey of the German market for digital experience services would be inconceivable without external support. For this reason, we would like to thank the following service providers for their kind support in realising the survey:

- Conclusion
- Plan.Net Group
- Reply
- Valtech

We would like to take this opportunity to express our special thanks to all the participating companies and the Lünendonk & Hossenfelder GmbH evaluation team. Many thanks for their comprehensive support in the preparation of this Lünendonk® Survey.

Even after 40 years of intensive market analyses and a constant dialogue with experts from science, companies and associations, Lünendonk & Hossenfelder GmbH is committed to delivering solid results and interpretations.

Nevertheless, we believe that new aspects, ideas and suggestions for improvement are always emerging. We are always grateful for such suggestions and would like to invite our readers to do the same.

Many thanks in advance!

The survey partners interviewed by Lünendonk

From pilot to full-scale operation: AI must be approached from an end-to-end perspective 70
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David Toma, Vice President Strategy & Consulting DACH, Valtech

Interview with Conclusion

From pilot to full-scale operation: AI must be approached from an end-to-end perspective

Many companies have numerous AI use cases and pilot projects, but only a few roll them out end-to-end into live operation. Sirko Schneppe, CEO of diva-e Conclusion, explains why: scattered data and an implementation process in which business, IT and data do not work together from the outset. Customers want answers like those from ChatGPT, without caring which system stores the information. At the same time, companies must ensure that they can also be found by AI systems.



Sirko Schneppe
CEO
diva-e Conclusion

CONCLUSION

When you talk to clients today about digital experience and AI, where do you see the biggest gap between what companies want to achieve and where they actually are at present?

Sirko Schneppe: The biggest gap lies not so much in the ideas as in their implementation. Many companies have numerous AI use cases and pilot projects, but only a few of these are already operating end-to-end in production. This is because an AI agent requires integrated data, processes or system landscapes – a long-standing issue in user experience. So: keep at it and close the data gap.

And how does Conclusion help to bridge this gap?

Sirko Schneppe: By bringing together strategy, experience, technology, data and implementation. Companies still need highly specialised partners – but not ten specialists whom they have to coordinate themselves. This approach is becoming increasingly ineffective, particularly in applied AI projects, as business, IT, data, processes and organisation must work together on a change from the very outset.

79 per cent of the companies surveyed by Lünendonk intend to increase their spending on digital experience over the next two years. In which areas of investment are you currently seeing the greatest momentum amongst your clients?

Sirko Schneppe: It is quite clear in the field of Applied AI – particularly with agent-based solutions – that the focus is gradually shifting from experimentation to productive applications; the 2027 budgets will provide a boost, including for investment in data integration.

With suites such as Salesforce, SAP, Adobe and Microsoft, the emphasis is now more on activating the built-in AI capabilities; here, too, process expertise is essential. In this respect, value creation is shifting from pure technology implementation towards 'business strategy execution'.

87 per cent of companies rate customer data platforms as highly relevant, followed by digital identities and security, and hyper-personalisation, at 76 per cent and 70 per cent respectively. Beyond these technologies, what capabilities do you believe will form the basis for a consistent customer journey and a high-quality digital experience in the future??

Sirko Schneppe: Above all, the ability to think in terms of end-to-end customer journeys and business processes, rather than individual systems and channels. Customers expect customer service to provide answers just as they are used to from ChatGPT – they are not interested in whether information is stored internally in the CRM, commerce or ERP system and is therefore unavailable. A fundamental prerequisite is therefore a unified data architecture, which is often still lacking. And the next step: once companies have everything in a single agent, they must recognise what their actual USP is in these times (when everyone has an agent) and how this USP is showcased in the digital experience.

As expected, AI remains the key trend. AI agent systems are currently used by 34 per cent of companies to manage customer journeys, whilst a further 36 per cent are planning to implement them. Where do you see reliable areas of application for AI agent systems in customer projects today, and what conditions must companies put in place to ensure that pilot projects develop into scalable solutions?

Sirko Schneppe: We are already seeing robust applications in service, sales, commerce and marketing. The challenge lies not so much in building an agent, but in deploying it in a way that is productively scalable and error-free – whilst ensuring the right compliance and governance. To achieve this, it is also necessary to integrate it into processes, data and systems. That is why we do not need yet more AI pilot projects, but rather AI applications that function end-to-end across the board and are actually used – because the devil is in the detail, a fact that is often overlooked. And this is precisely why we at diva-e Conclusion have developed the first fully-fledged use cases based on a mature Agentic Experience Foundation: the AI Product Advisor (Search), AI Content Creator Agent and Invoice Chaser Agent are just the beginning of a series of further, tried-and-tested applications.

Data quality is regarded as one of the key prerequisites for personalisation and AI-driven interactions, and this is an area where the companies surveyed report facing particularly significant challenges. In practice, where do the greatest shortcomings lie in terms of data models, data ownership and data maintenance – and how can these be resolved in the long term?

Sirko Schneppe: Companies hardly ever have too little data; unfortunately, however, this data is often scattered across various systems, each with different definitions, quality standards and areas of responsibility. However, I wouldn't start by launching a data programme that would take years to standardise everything. It is better to select relevant end-to-end business cases and consistently bring the data, governance and integration for these up to production standard. This gradually creates a better data foundation – linked to tangible business value. Often, the first step alone lays the groundwork for several further opportunities.

When it comes to GEO – that is, the evolution of SEO towards AI-based search systems – many companies are still taking a cautious approach: 57 per cent of companies are merely monitoring developments so far, whilst a further 23 per cent do not currently consider GEO to be relevant. Only 7 per cent are already implementing a strategy. Shouldn't we be picking up the pace here?

Sirko Schneppe: Yes. The way people find information and products is undergoing a fundamental shift. Alongside Google, all AI chatbots and other AI-based interfaces are emerging as channels, even on Google itself. Companies should invest in their visibility immediately. They must not only be visible in search engines, but also be understood by AI systems and recognised as a relevant source. This should be an absolute priority in 2027.

"AI is already evolving from an additional feature into a new layer in the customer journey and is increasingly becoming part of value chains. As a result, marketing, commerce and service are undergoing fundamental change."

Sirko Schneppe
diva-e Conclusion

Looking ahead to the next three years: Which topics and developments should CMOs and those responsible for customer experience be sure to keep an eye on?

Sirko Schneppe: AI is already evolving from an additional feature into a new layer in the customer journey and is increasingly becoming part of value chains. This is fundamentally transforming marketing, commerce and service. We should no longer think solely in terms of employees, but rather in terms of employees and agents, in every process – be it content marketing, customer service or even sales outreach. It is important to bear in mind the role of the brand, the significance of which, in my opinion, will decline, and the AI experience, which is playing an ever-greater role in determining reputation and visibility.

The findings presented above show that marketing, sales and service are changing at an enormous pace, meaning that companies must constantly reinvent themselves. In the study, 40 per cent of companies therefore state that, in future, service providers must take on a greater role as integrators, assuming strategic control of transformation programmes and end-to-end technological responsibility. What does this mean for you, and how does Conclusion position itself in this role?

Sirko Schneppe: Specialisation and end-to-end responsibility must go hand in hand. Companies need in-depth expertise in AI, data, user experience, the cloud or security, but are neither willing nor able to coordinate these specialists themselves – particularly in the SME sector. This is precisely where the strength of the Conclusion model lies: specialised companies with a high level of technical expertise that can jointly take responsibility for larger-scale transformations. A purely technical boutique is not enough; AI is about organisational and technological transformation.

At the end of 2025, Conclusion acquired the data specialist Gabo and integrated it into Conclusion Intelligence. In which other areas does Conclusion plan to expand its portfolio?

Sirko Schneppe: Data and AI remain key growth areas for us and are essential to our clients' development. In addition, we will continue to expand our industry expertise in a targeted manner, and there is significant potential in related areas that provide the necessary AI infrastructure, such as cloud management, cyber security and data integration. In doing so, we will draw on the strength of the European Conclusion Ecosystem, which comprises more than 4,000 employees. Business transformation using AI requires expertise in many specialist fields. However, a deep understanding of our clients, their markets and their industrial processes remains crucial. This is precisely where we will continue to invest, in both technology and consultancy.

"Specialisation and end-to-end responsibility must go hand in hand. Companies need in-depth expertise in AI, data, user experience, the cloud or security, but are unwilling and unable to manage these specialists themselves – particularly in the SME sector."

Sirko Schneppe
diva-e Conclusion

Interview with Plan.Net Group

Marketing needs to learn – not just automate

Artificial Intelligence is not only changing marketing at the level of individual tools. It is shifting the logic by which brands generate relevance, make decisions and learn from results. Christian Schmitz, CEO of the Plan.Net Group, explains why companies now need a learning marketing operating model – and why human judgement, distinctive brand ideas and in-house intelligence are becoming increasingly important in this context.



Christian Schmitz
CEO
Plan.Net Group

PLAN.NET
HOUSE OF COMMUNICATION

Mr Schmitz, in your view, what is the most important change that marketing organisations need to adapt to by 2030?

Christian Schmitz: Marketing is evolving from a campaign-driven operation into a learning system. Today, many organisations still operate according to a cycle of briefing, production, delivery and reporting. This sequence is too slow for a world where signals emerge in real time, AI accelerates content and decision-making, and customer expectations are constantly changing. It is therefore not a matter of simply adding another tool at individual stages. Companies must reorganise the cycle of perception, decision-making, action and learning. Data, creative, media, technology and commerce must no longer operate in sequence, but must be aligned towards shared objectives and a common decision-making logic. We call this 'Marketing Must Learn': in future, competitive advantage will lie less in a static knowledge lead than in the speed with which an organisation translates robust insights into better customer experiences and measurable growth. This is, above all, a leadership task. Processes, responsibilities and budgets must be designed in such a way that learning is not merely documented at the end, but is embedded in day-to-day operations.

What role does agent-based AI play in this new operating model?

Christian Schmitz: Agent-based AI is the next step beyond the selective use of generative AI. A co-pilot supports a person with a task; an agent can, within clear parameters, independently pursue sub-goals, use tools, review results and trigger the next step. In marketing, specialised agents can, for example, consolidate target group signals, develop variants, evaluate media scenarios or feed learnings back into the next activation. However, the added value does not come from a single 'super-agent', but from the coordinated interaction between people, data, models and specialist agents. This is precisely why we refer to it as AI-Orchestrated Marketing. People set the objectives, brand framework and risk limits, intervene in relevant decisions and take responsibility for the outcome. The machine increases speed and scale. To this end, Plan.Net has established its own Agentic AI unit in 2026 and is already working on roll-outs in the automotive, banking and FMCG sectors. Our aim is not to produce eye-catching demos, but to create robust processes that can be integrated into the real-world system landscape and demonstrably enable better decisions.

Many companies are already experimenting with AI. Why, then, do the economic benefits often fall short of expectations?

Christian Schmitz: Because usage does not yet constitute an operational model. The Lünendonk Survey 2025 highlights this gap very clearly: whilst 95 per cent of the service providers surveyed already offer AI agents, only 31 per cent of user companies had implemented corresponding solutions. At the same time, 65 per cent cited the integration of AI into marketing processes as a key challenge. The problem is rarely the model alone. What is lacking are prioritised use cases, reliable data access, clear decision-making authority and a measurement framework that extends all the way to the bottom line. Successful companies therefore do not start with the longest possible list of use cases. They select a few highly relevant value streams, appoint a responsible owner and establish a baseline in advance: for example, lead time, quality rate, incremental revenue or costs avoided. Only once benefits, quality and risk have been substantiated is the initiative scaled up. This is what distinguishes industrial transformation from 'pilot theatrics'. Speed is important – but only when backed by evidence. Otherwise, you simply automate existing inefficiencies and, in the worst case, produce more mediocrity at a faster rate.

If machines generate and select more and more content, what will become of the brand?

Christian Schmitz: The brand does not become any less important, but rather more demanding. When generic production is virtually free and available in unlimited quantities, the value of what cannot be reproduced at will increases: a clear stance, distinctive codes, cultural relevance and a strong idea. That is why we speak of 'Meaning for Machines'. Brands must continue to connect with people on an emotional level, whilst at the same time being clearly readable by search systems, recommendation algorithms and AI assistants. These systems are increasingly acting as intermediaries between supply and demand. Those who optimise only for traditional search engines are falling short. Companies need a consistent architecture of meaning: structured product and knowledge data, verifiable statements, recognisable language, and assets that fit together across channels.

This must not result in technocratic optimisation. AI can generate variations and predict reactions; however, it cannot make the business decision as to what a brand wants to stand for. The greater the efficiency of machines, the more important human ambition, taste and the courage to be different will become.

"Brands must continue to connect with people on an emotional level, whilst at the same time being clearly readable by search engines, recommendation algorithms and AI assistants. Those who optimise only for traditional search engines are falling short."

Christian Schmitz
Plan.Net Group

You also talk about the concept of 'intent over identity'. What does this mean for personalisation and data protection?

Christian Schmitz: The industry has long confused personalisation with creating the most detailed personal profiles possible. Yet relevance is not always determined by who someone is in the long term, but by what that person wishes to achieve at a specific moment. Intent can be deduced from context, behaviour and situation – often using less data and proving more useful than a comprehensive identity profile. A learning marketing system should therefore interpret signals, form hypotheses and test them at the next point of contact, rather than hastily categorising people into rigid segments. This not only improves the customer experience, but also strengthens trust and resilience in a world where less third-party data is available. Clear rules are essential: which signals may be used for which purpose? How long do they remain relevant? When is human approval required? And how can a decision be traced? Responsible AI is not an after-the-fact compliance filter, but an integral part of the design. Truly good personalisation does not feel like surveillance. It reduces effort, increases situational benefit and respects customers' autonomy in decision-making.

How must the way we measure success change so that marketing can credibly demonstrate its value contribution?

Christian Schmitz: We need to move away from 'Metrics to Money'. Reach, clicks or engagement remain useful for diagnostic purposes, but they are not a sufficient answer to the question of what contribution marketing makes to business success. This requires an end-to-end chain stretching from the activity itself, through observable behavioural changes, to incremental revenue, margin, customer value or risk reduction. No single method can map this chain on its own. Marketing mix modelling, experiments, attribution and business data must be combined as appropriate for each decision. It is equally important to define the decision before the analysis: which budget, which offer or which touchpoint is to be changed? This is how measurement becomes actionable.

Plan.Net deliberately positions itself here not as a provider of yet another isolated platform, but as an orchestrator between marketing, finance, data and technology. Our aim is to establish a framework that remains firmly embedded within the organisation: with transparent assumptions, repeatable tests and clear learning cycles. This builds trust with the CFO and prevents optimisation from focusing solely on effects that are easily measurable in the short term but strategically weak.

What distinguishes this approach from the transformation offerings of other major digital service providers?

Christian Schmitz: Many market players are currently, and quite rightly, investing in their own AI platforms, content engines and agents. What sets us apart is the combination of three elements: integrated implementation expertise, a consistent learning architecture and 'client-owned intelligence'. We do not want to set up a new 'black box' alongside the organisation, nor do we want to create a dependency on a proprietary 'agent zoo'. Together with our clients, we structure data access, decision-making rules, prompts, evaluation procedures and knowledge bases in such a way that they become part of their own assets. We then openly orchestrate the appropriate models and technologies around these. At the same time, we link this technical layer with brand, creative, media, customer experience and commerce. After all, faster content production alone does not equate to better marketing. Only when a strong idea takes effect across the entire experience, systems learn from results and the economic impact is proven, does a sustainable advantage emerge. In practical terms, for the next twelve months this means: selecting a relevant value stream, defining governance and a baseline, appointing an interdisciplinary team and learning productively in short cycles. It is not the organisation with the largest collection of tools that wins, but the one with the highest responsible rate of learning.

"We need to move away from 'Metrics to Money'. Reach, clicks or engagement remain useful for diagnostic purposes, but they are not a sufficient answer to the question of what contribution marketing makes to business success."

Christian Schmitz
Plan.Net Group

Interview with Reply

When AI agents make decisions on behalf of customers

AI agents are fundamentally transforming the digital experience: they advise customers, guide purchasing decisions and, in the future, will carry out transactions too. In this interview, Dr Thomas Hartmann and Thorben Fasching from Reply discuss why companies must now strategically position content supply chains, GEO and first-party data, and explain how personalisation, brand consistency and trust can be combined in the process.



Dr. Thomas Hartmann
Member of Board
Reply



Thorben Fasching
Executive Partner
Reply

Let's start with a quick check-in: How do you currently view the market for digital experience services?

Dr. Thomas Hartmann: We are at a turning point. Digital experience is evolving from the design of individual touchpoints into an intelligent, dynamic system that understands customer needs and enables personalised interactions in real time. Websites, apps and campaigns remain important – but in the future they will form part of a larger AI-enabled ecosystem. Customers are increasingly interacting via assistants and agents that evaluate information, compare options and support decision-making. This is also changing what is expected of businesses: they must not only create attractive digital experiences, but also remain visible and relevant in a world where the interface with the customer is increasingly shaped by AI. For us, this is a huge opportunity. Those who bring together creativity, data, technology and responsible governance can not only design experiences more efficiently, but also rethink them entirely. Our Digital Experience Trend Report and our renewed top ranking in the BVDW internet agency ranking show that this approach is in demand amongst clients.

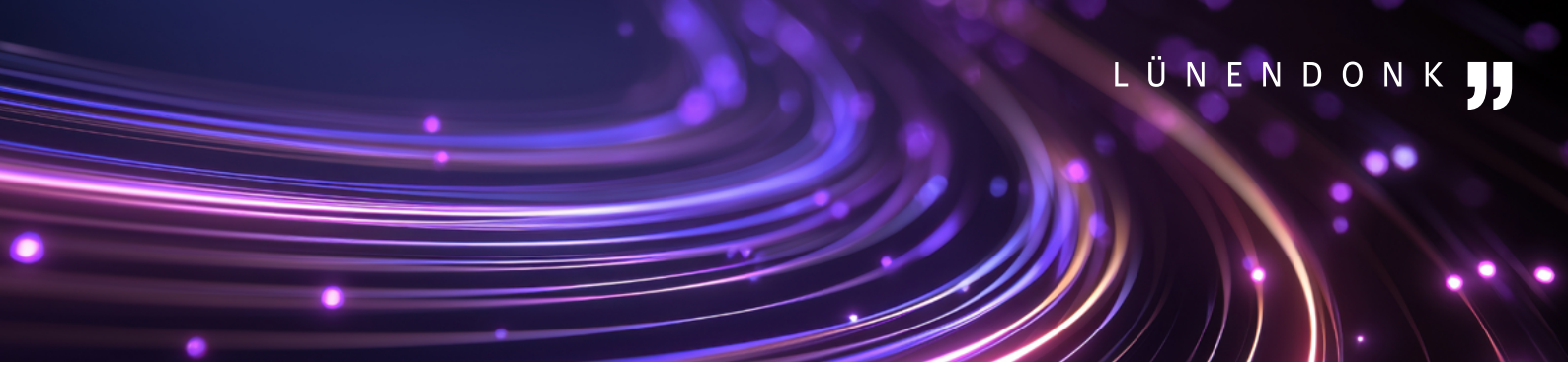
Around a third of the companies surveyed by Lünendonk are already using generative AI or AI agent systems, and a further third are planning to do so. Where do you see the most compelling use cases in the marketing and experience landscape?

Thorben Fasching: The potential lies not solely in the automated creation of text or images. It lies in AI's ability to bridge the gap between a customer's intention and a suitable solution. An AI agent can, for example, understand a customer's query, collate information from various sources, develop a personalised recommendation and prepare the next step in the service, sales or commerce process.

Our intelligent, AI-powered 'Retail Mirror' for high-street retail illustrates this: customers interact with an avatar at the point of sale, receive product recommendations, can put together combinations, try on products virtually and complete the purchase straight away. Advice and checkout merge into a single interaction. This makes 'digital clienteling', for example, scalable to a significantly larger number of customers and can bridge the gap between online shopping and high-street retail.

AI-generated images or text are already widespread. 56 per cent of companies do not yet have a structured operating model for the increasingly AI-based production of content. How should a modern content supply chain be structured so that companies can combine speed, quality, brand consistency and personalisation?

Dr. Thomas Hartmann: The key is not the generation of individual pieces of content. Companies need an operating model for the entire content lifecycle. It combines planning, creation, approval, distribution and performance measurement into a seamless process. The foundation is a brand-specific, structured content and knowledge layer that links content, products, data, design principles, tone of voice and legal requirements. On this basis, generative AI can create, adapt, localise and tailor content for different channels or target audiences.



Automated checks ensure the results comply with guidelines on tone of voice, rights, accessibility and regulatory requirements. Performance data, in turn, feeds back into the planning process. The role of teams is thus shifting: away from repetitive content production, towards creative direction, quality assurance and the development of compelling brand ideas. This reduces production costs whilst increasing speed and personalisation, without brands losing consistency.

Autonomous commerce applications, in which agents make decisions and execute transactions independently, are, by contrast, still in their infancy. What are your expectations regarding how this field will develop over the next two years – including in terms of control, trust and a positive brand experience for customers?

Dr. Thomas Hartmann: Autonomous commerce will develop faster than many currently expect – initially in clearly defined scenarios involving recurring, comparable and rule-based decisions. Agents will review offers, check availability, compile shopping baskets and trigger reorders within defined parameters. As a result, the web is evolving from a navigable interface into a goal-oriented space for interaction: users formulate an intention; agents take over parts of the research, selection and execution. New forms of sales are emerging for businesses, as AI agents, alongside humans, are becoming key users of product information, services and digital platforms. Companies must therefore design their offerings in such a way that they are just as comprehensible, reliable and actionable for algorithmic decision-making systems as they are for their customers. The foundation for this lies in high-quality product data, transparent services and secure interfaces.

AI-powered search systems have so far had a noticeable impact on marketing and sales in only one in five companies. At the same time, only 7 per cent have actively implemented a GEO strategy, and for 57 per cent, GEO is not currently on the agenda. How do you assess these findings?

Thorben Fasching: The results reveal a significant gap between changes in user behaviour and the speed at which many companies are responding. Alongside traditional search engines, large language models are emerging as key interfaces between consumers and brands. Any brand that does not appear there as a relevant and trustworthy source loses influence early on in the decision-making process. GEO therefore complements SEO. Companies should not rely on AI systems to pick up the right information about their brand by chance. What is needed is structured, machine-readable content, precise metadata and reliable pages that are specifically tailored to relevant AI queries. Digital PR and a presence on independent platforms further strengthen the brand's credibility. Success can be measured, amongst other things, by the 'Share of Answer'. GEO is therefore a cross-functional task for marketing, communications, commerce and technology.

"Alongside traditional search engines, large language models are emerging as key interfaces between consumers and brands. Anyone who does not appear there as a relevant and trustworthy source will lose influence early on in the decision-making process."

Thorben Fasching
Reply

The study reveals a clear desire for greater autonomy regarding first-party data: 30 per cent want to develop their own first-party data strategy, 27 per cent wish to invest in their own technical infrastructure, and 24 per cent aim to build up in-house data expertise. In your view, how can companies consolidate data from CRM, commerce and service in such a way that hyper-personalisation complies with data protection and governance requirements?

Dr. Thomas Hartmann: The desire for greater autonomy regarding first-party data is understandable. First-party data forms the basis for relevant and long-term customer relationships – provided, of course, companies use it responsibly. The key is not to collect as much data as possible on a single platform, but to link it meaningfully via clear identities, interfaces and shared data models.

CRM, commerce and service data must be embedded within a unified data strategy. Consent, purpose limitation, access rights and data erasure policies must be integrated into the technical and organisational architecture from the outset. A Customer Data Platform can support this. However, it is not an end in itself, because hyper-personalisation arises from relevant interactions in the right context, not from collecting as much data as possible. Transparency and freedom of choice build trust. And trust is essential if data is to be used in the long term to create better customer experiences.

Reply combines consultancy, systems integration and digital services within a network of specialised companies. How do you manage to bring these capabilities together to form an integrated end-to-end service for customers?

Dr. Thomas Hartmann: Our clients' challenges can no longer be solved from a single perspective. A compelling digital experience requires an understanding of the business model and industry, creative excellence, robust data and AI expertise, and the ability to integrate and operate complex technologies using an end-to-end approach. This is precisely where the strength of the Reply network lies. To this end, Reply brings together the expertise of specialist companies. Depending on the task at hand, teams are assembled comprising experts in strategy, experience design, development, data and AI, and systems integration. The collaboration extends from the initial definition of objectives through to implementation, operation and further development. Our aim is to work with our clients to develop digital experiences that inspire and make a measurable contribution to business success.

"Hyper-personalisation is achieved through relevant interactions in the right context, not through the collection of as much data as possible. Transparency and freedom of choice build trust."

Dr. Thomas Hartmann
Reply

Interview with Valtech

How businesses create measurable value through AI and connected experiences

Many companies have invested heavily in platforms, data, the cloud, commerce, content and automation. Yet a large part of this potential remains untapped: customer experiences are fragmented, decision-making takes too long, teams work using manual workarounds, and AI is often limited to individual pilot projects. In this interview, David Toma, Vice President of Strategy & Consulting for the DACH region at Valtech, explains why the next stage of transformation is not the next major platform migration. The key will be to activate existing digital assets and organise people, technology, data and AI around the moments that generate customer value, efficiency and growth.



David Toma
Vice President Strategy & Consulting DACH
Valtech

Valtech

Mr Toma, many companies have invested heavily in digital technology in recent years. In your view, what is the next major challenge?

David Toma: We are seeing a clear shift in maturity. A few years ago, the focus was often on simply setting up digital channels, commerce platforms, experience platforms or data infrastructures. These investments are now in place. Nevertheless, this does not automatically result in a better experience, a faster contribution to turnover or higher productivity.

This is also evident in our latest Valtech survey, The Agentic Age: AI has been part of everyday working life for some time now. 88 per cent of the professionals surveyed use AI several times a week or more frequently, whilst 86 per cent report productivity gains of at least ten per cent. But productivity at an individual level does not yet constitute transformation. The crucial question is: does this also lead to better collaboration, faster decision-making, a better experience and measurable business value?

The key issue today is untapped value potential. In many companies, the next wave of growth is already embedded in existing platforms, data, content, processes and teams. It simply hasn't been consistently harnessed yet. Systems operate in silos, data isn't available where decisions are made, and customer experiences break down at organisational or technological interfaces. The next phase, therefore, is not about building everything from scratch, but about setting what already exists in motion and generating measurable impact.

Valtech talks about unlocking untapped value potential within companies. What exactly do you mean by that?

David Toma: This potential exists on several levels. Firstly, in technology: DXP, CMS, commerce, CRM, CDP, DAM, PIM, analytics and the cloud only realise their full value when they operate as an integrated system. Secondly, in processes: content production, campaign management, product data maintenance, service, releases or reporting often take too long because too many handover points and manual steps are required. Thirdly, in decision-making: many companies possess data, but do not always have the trust, speed or decision-making framework to act on it consistently.

Value is not created abstractly in a platform. It arises in specific moments: when a product search becomes more relevant, a checkout process is smoother, a service issue is resolved immediately, a quote is generated more quickly, or content is rolled out consistently across multiple markets. This is precisely where transformation must begin.

Many companies associate this next phase primarily with AI. What does AI really change?

David Toma: AI does not change everything simply by being added as another tool alongside existing processes. Its value arises when it is embedded within actual workflows. Many companies have AI pilot projects: a chatbot here, a content test there, a co-pilot in the development team. This helps with learning, but rarely changes the value created.

What's interesting is that, in our survey, only 4.3 per cent of respondents believe that further AI pilot projects would unlock the greatest value. That's a strong signal. The pilot phase was important, but the next phase requires integration, governance and clear decision-making authority between humans and AI. It's not about even more experiments, but about embedding AI where work really gets stuck.

The next step is to link AI to workflows, data and decision-making. Then it can enrich product data, create content variants, generate test cases, prepare service cases, recognise patterns, structure decisions or validate releases. This requires clear rules: Which sources is AI permitted to access? Which decisions is it permitted to prepare or execute? Where does human responsibility lie? How are brand, quality, data protection and governance safeguarded?

I am a firm believer in human-plus-AI workflows. Humans provide direction, context, creativity, judgement and responsibility. AI takes care of research, variant generation, analysis, automation and operational acceleration. This creates speed with control, not automation at any cost.

What does this mean for the way in which transformation projects are implemented in future?

David Toma: The traditional approach of large, sequential transformation programmes is becoming increasingly outdated in the face of the market's pace. Of course, companies need a vision. But value isn't created when strategy, design, data, technology and operations work in succession. Value is created when small, experienced, interdisciplinary teams work together towards a clearly defined outcome.

We are therefore seeing a shift away from large programmes towards precise value cycles. A team focuses on a specific area – for example, product search, the content supply chain, service case resolution, lead conversion, the quotation process, release quality or platform operations. Then, within a few weeks, they build, test, measure and improve. Not as a strategic charade, but as a close collaboration between Experience, Product, Engineering, Data, AI, Governance and Operations.

This also changes the team structure. There is a need for fewer large, discipline-based teams and more small pods comprising experienced orchestrators and doers who work closely with the business units and shorten decision-making processes. The aim is not to work through the scope more quickly. The aim is to generate better outcomes more quickly.

"It is not the number of platforms that makes the difference, but the ability to quickly transform existing digital assets into measurable value: centred on the moments when customers decide, buy, stay or leave."

David Toma
Valtech

Can you give an example where this change is particularly evident?

David Toma: A very good example is the content supply chain. Many companies today have a DAM, a PIM, a CMS, translation processes, brand guidelines and various channels. Nevertheless, content production is often slow, expensive and inconsistent.

A typical scenario: a company has already digitised its product data, images, technical descriptions, campaign assets and translation processes. Yet it still takes weeks for product content to go live across multiple markets. Teams copy information between systems, manually check it against brand guidelines, wait for approvals and re-adapt content for each channel. The bottleneck here is not a lack of technology. The bottleneck is a lack of orchestration.

Generative AI can speed things up enormously here. But if you merely generate more output, in the worst-case scenario you'll just be scaling average. The crucial step is to think of content as a system. Product data, brand logic, tone, approvals, legal compliance, localisation and performance data must be brought together. Then AI can not only generate text or images, but also work within clear parameters.

People spend less time on repetitive creation and more time on storytelling, quality control and brand management. The result is not simply more content. It is more relevant content, brought to market faster and more easily measurable.

How will this affect the future of commerce?

David Toma: In time, commerce will become more clearly divided into two distinct areas. There are moments when buying needs to be as effortless as possible: reorders, searching for products when you know exactly what you need, spare parts, booking appointments, service enquiries or checking the status of orders. In these cases, AI-powered assistants and agent-based interfaces will eliminate a great deal of friction.

At the same time, there are moments when shopping is meant to be a conscious experience: inspiration, discovery, advice, brand loyalty, customisation or the joy of comparing products. In these instances, commerce must remain memorable. I would phrase it like this: effortless when it's routine; memorable when it matters.

What is fundamentally changing is the starting point of the journey. Customers will not always begin via a traditional shop. They are increasingly searching, comparing, configuring and making decisions in dialogue-based environments. Our latest Valtech report, *The Era of Conversational Commerce*, shows just how far this development has already progressed: 72 per cent of consumers surveyed would at least consider completing a full purchase, including payment, within an AI chat app. The question, therefore, is no longer whether people will use such interfaces, but whether brands are present there in a way that is trustworthy, relevant and capable of taking action.

The traditional shop is not going to disappear. But its role is changing. It is increasingly becoming an anchor of trust, a data and transaction infrastructure, and a brand experience, whilst research, comparison and advice are increasingly taking place outside the shop's own touchpoints. This is precisely why product data, content, prices, availability, service information and brand logic must be structured in such a way that they can be understood by people and processed by AI systems.

The biggest hurdle here is not just technology, but trust. When it comes to payment, personal data, availability, returns or complaints, customers expect security, transparency and, if in doubt, a seamless handover to a human. Successful commerce will therefore not be purely automated. It will be orchestrated: AI where it provides guidance, speed and relevance; people and the brand's own channels where trust, responsibility and relationships are crucial.

"What is fundamentally changing is the starting point of the customer journey. Customers will not always start at a traditional shop. They are increasingly searching, comparing, customising and making decisions in dialogue-based environments."

David Toma
Valtech

What does this mean for collaboration between companies and DX service providers?

David Toma: The role of external partners is changing significantly. A service provider that delivers just a single specialism is often no longer sufficient for this kind of value creation. Companies need partners who can bring together strategy, experience, technology, data, AI and operations, whilst at the same time being pragmatic enough to work with the existing ecosystem.

In my view, the old distinction between consultancy, agency and technology is becoming increasingly obsolete. The relevant questions today arise at the interfaces: How does a data strategy translate into a better customer experience? How does a commerce platform become a scalable growth model? How does AI-driven efficiency become a new operating model? And how do many individual tools come together to form a system that actually connects decisions, content, services and interactions?

This is precisely where we see Valtech's role: not as just another implementation partner selling yet another solution, but as an orchestrator between experience, technology, data and operational impact. Today, the greatest value often does not lie in introducing yet another platform. It lies in connecting existing systems, data and teams in such a way that a tangible business impact is achieved: higher conversion rates, shorter time-to-market, better service quality, faster releases or reduced operational friction.

The demands placed on DX service providers are therefore rising significantly. They must be able to advise, design, build, integrate, operate and continuously optimise. And they must themselves work in an AI-native way in order to deliver faster without compromising quality, security or brand integrity. For us, this means: we work not only on the digital front end, but on a company's ability to continually generate new value from its digital assets.

What advice would you give to decision-makers who want to take action now?

David Toma: Don't start with the technology. Start by asking where value is being lost today: in broken customer journeys, slow decision-making, manual workarounds or unused data. Where do customer experiences break down? Where does work take too long? Where are you losing revenue, trust or speed? Where do you already have platforms, content or data that aren't being utilised sufficiently?

Then you should select a clearly defined but relevant area. Not ten priorities at once, but one area with a visible impact. This requires a clear KPI: conversion, time-to-market, service costs, content turnaround time, release speed, data quality or decision-making time. Within six to twelve weeks, it must become clear whether the approach is working.

Companies do not need to transform everything at once. But they must develop the ability to continuously leverage their digital assets. The future does not belong to the organisations that possess the most technology. It belongs to the organisations that best integrate systems, data, people and AI around the crucial moments of experience, thereby creating value more quickly.

Conclusion DACH was founded in 2025 by the digital service provider diva-e Conclusion and the data and AI specialist Conclusion Intelligence, and was expanded in the same year through the acquisition of GABO, an IT service provider specialising in business intelligence and data platforms.

Whilst diva-e Conclusion, with over 20 years' experience in full-service provision, is one of Germany's leading digital service providers in the field of digital experience, covering the entire digital value chain for businesses – from planning and project management through to digital marketing and UX/UI services, right through to implementation, operation and maintenance, Conclusion Intelligence focuses on the development and implementation of future-proof data and AI solutions, combining comprehensive expertise in business intelligence and modern data platforms with the use of artificial intelligence to optimise business processes and unlock new business potential. Conclusion

Conclusion DACH is part of Conclusion, an international business transformation and IT service provider with more than 4,000 employees, which acts as a bridge between strategy, business and technology. Conclusion is thus extending its established ecosystem model for business transformation and IT services to the digital market in Germany, Austria and Switzerland. The range of services includes Digital Experience, Software & Development, Cloud & Mission Critical, Enterprise Applications, Business Consultancy and Data & AI. Conclusion is thus continuing its European growth strategy in the DACH region as well.

In 2025, Conclusion DACH generated revenue of more than 101 million euros with around 900 employees and serves more than 200 high-profile clients, including ALDI SÜD, E.ON, Bentley and Deutsche Telekom.

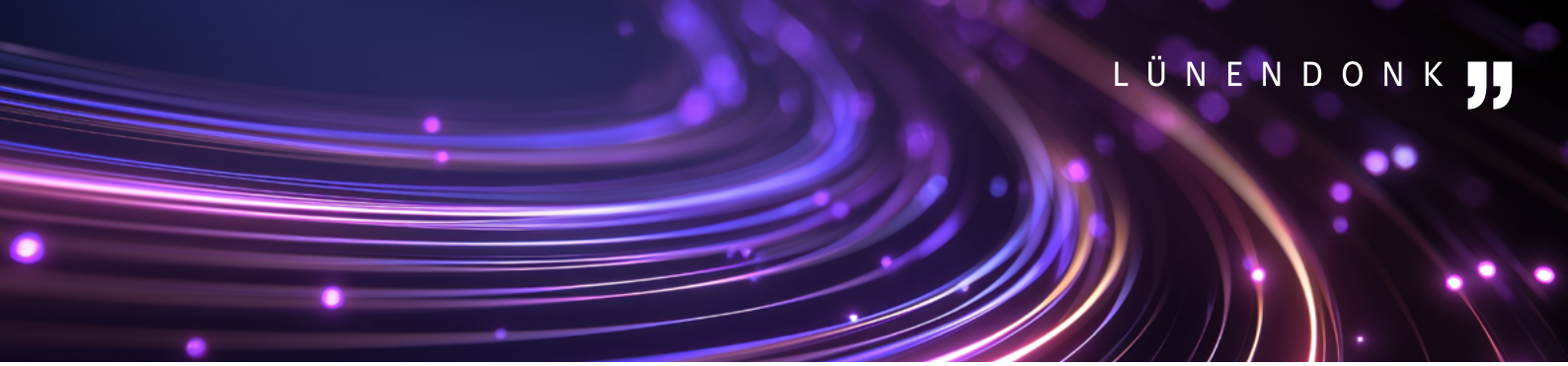
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The Plan.Net Group is a comprehensive, integrated provider of digital services and technologies, as well as strategic transformation consultancy and implementation. Founded in 1997 as a subsidiary of Serviceplan, the agency now employs over 1,000 experts in the fields of Data & Consulting, Experience, Technology and Activation across 26 locations worldwide, making it one of the largest owner-managed digital agencies in Europe. Together with its sister brands Serviceplan and Mediaplus, Plan.Net forms the House of Communication. Renowned clients, including BMW, Bosch, Lufthansa, MediaMarkt Saturn, OTTO, PENNY and ZDF, place their trust in the agency's high-performing portfolio of integrated services, innovative products and platform solutions.

At their core is the ambition to evolve marketing from a campaign-driven operation into a learning system – summarized in the guiding principle "Marketing Must Learn". Under the "AI Orchestrated Marketing" approach, Plan.Net orchestrates people, data, models and specialised AI agents around shared business objectives: people are responsible for the objective, brand framework and outcome, whilst machines increase speed and scale. By 2026, the Group had established its own Agentic AI unit for this purpose, with roll-outs in sectors including automotive, banking and FMCG. The "Client-owned Intelligence" approach ensures that data access, decision-making rules and knowledge bases become the clients' assets – rather than a new black box. The Plan.Net Group is led by CEO Christian Schmitz.

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Reply specialises in the design and implementation of solutions based on new communication channels and digital media. Through a network of highly specialised companies, Reply defines and develops business models enabled by AI, big data, cloud computing, digital media and the Internet of Things (IoT). Reply provides consultancy, systems integration and digital services to companies in the telecommunications and media sectors, industry and services, banking and insurance, and the public sector.

Reply leverages innovative technologies, AI-driven insights and creative expertise to design digital experiences that engage brands, customers and employees. The complex challenges of our clients are addressed through highly efficient, integrated solutions developed by leading experts within our network of companies. Customer Centricity, Human-Centred Design and the application of AI form Reply's guiding principles, ensuring that our products, services, content and experiences meet the needs and expectations of both clients and end users.

Generative AI automates and optimises the creation of campaign content, newsletters and personalised messages within clear governance guidelines. At the same time, AI agents, digital assistants and digital humans enhance the quality of customer service by responding to enquiries quickly, accurately and with empathy. Hyper-personalisation – enabled by the intelligent, data-protection-compliant use of CRM, DXP and CDP data – creates customised interactions that adapt to individual needs in real time. As customers increasingly use AI assistants and agents to support decision-making, we also help companies ensure that their brands remain visible and relevant in AI search systems (GEO). In this way, we boost the efficiency and effectiveness of marketing and enable businesses to create a completely new, personalised customer experience.

The Reply companies operating in the field of Digital Experience bring together interdisciplinary teams of specialists who jointly develop solutions for internationally positioned clients across a wide range of industries. In the 2026 German BVDW Internet Agency Ranking, Reply ranks second.

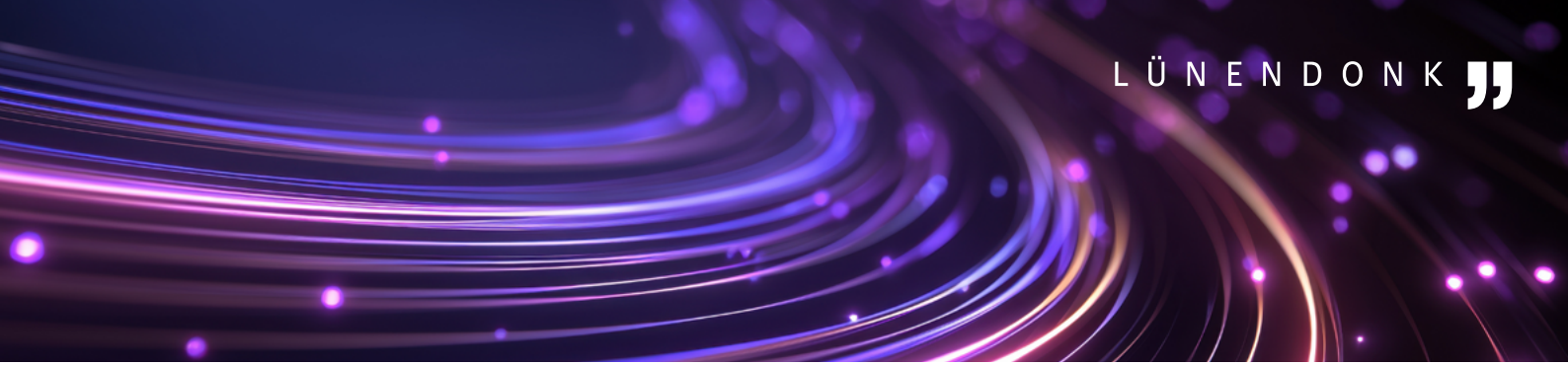
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Valtech, the global leader in experience innovation, exists to unlock a better way to experience the world. By delivering sustainable, human-centric digital solutions that prepare businesses for the future, we empower brands to leapfrog the competition and surpass best practices.

Our 6,000-strong team in 24 countries crafts intelligent, personalized experiences that blend crafts, categories and cultures. At the intersection of data, AI, creativity and technology, we touch lives, grow businesses and unlock value in a digitally accelerated world. Our clients include the world's leading brands, such as AXA, Dolby, Mars, Mercedes, P&G, Santander, Toyota and Volkswagen. See our work at Valtech.com.

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About Lünendonk & Hossenfelder

Lünendonk & Hossenfelder, based in Mindelheim (Bavaria), has been analysing the European business-to-business (B2B) services markets since 1983. The market researchers focus on the sectors of digital & IT, business consulting, auditing, tax and advisory consulting, real estate services, the staffing industry (temporary staffing, IT workforce) and professional education & training.

The portfolio includes surveys, publications, benchmarks and consulting on trends, pricing, positioning, or contracting procedures. The large data pool enables Lünendonk to derive insights with a view to making recommendations for taking action. For decades, the market research and consulting company has published the "Lünendonk® Lists and Surveys", which are regarded as market barometers.

Many years of experience, in-depth know-how, an excellent network and, by no means least, a passion for market research and people make the company and its consultants sought-after experts for service providers, their customers, and journalists. Every year, Lünendonk and a media jury honour deserving companies and personalities with the Lünendonk B2B Service Awards.



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