

Lünendonk® Survey 2025

The Market for Digital Experience Services in Germany

How AI and MarTech are redefining the customer journey and transforming collaboration with DXS providers

A survey conducted by Lünendonk & Hossenfelder GmbH in collaboration with

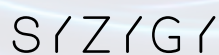


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Foreword

Dear Readers,

This is the latest edition of the Lünendonk® Survey on the market for Digital Experience Services (DXS) in Germany. Since 2017, we have been systematically analysing this market, observing its maturity, its disruptions – and above all, the growing importance of integrated customer experiences across marketing, sales, service and commerce. This current edition continues that work while expanding the perspective to include key developments that will shape the coming years.

DIGITAL EXPERIENCE SERVICES: RETHINKING CUSTOMER EXPERIENCES

By Digital Experience Services, we understand the interaction between customer strategy, creation, media, data & AI, technology and operations – in other words, all the capabilities required to design, scale and continuously improve customer-centric journeys in a holistic manner. Why is this relevant? Firstly, because the nature of customer interaction is changing, requiring consistent experiences to be created across various channels. Secondly, companies must keep pace with the speed of technological change in order to remain competitive and avoid being overtaken by early adopters. Technology is therefore becoming an increasingly critical competitive factor.

TECHNOLOGY, SPEED, TRANSFORMATION: WHAT IS CHANGING NOW

The past months have been characterised by rapid technology cycles – particularly around generative AI and the automation of process chains. Examples include automated media production, AI-supported customer interactions and agent-based campaign orchestration. User search behaviour and the online visibility of companies and brands are also undergoing massive changes due to ChatGPT, Google AI Overviews and similar technologies. Content must now be understandable to both humans and AI agents – through structured, machine-readable data, clear taxonomies and transparent sources. For marketers, this represents both a new opportunity and a challenge.

A CHANGING DXS PROVIDER MARKET

For service providers, this means a shift towards integrated, AI-driven journeys: portfolios and delivery models must be conceived end-to-end – from strategy and creation through data & AI, platform solutions, and composable architectures to the operation and orchestration of applications.



Mario Zillmann

Partner



FOREWORD

The Market for Digital Experience Services in Germany

This requires upskilling in data engineering, prompting/agent design, MLOps and journey orchestration, closer partnerships with hyperscalers and platform providers, and more outcome-oriented pricing models.

A 360-DEGREE VIEW OF THE GERMAN DXS MARKET

The Lünendonk® Survey analyses these developments and trends, providing a comprehensive overview of the market for Digital Experience Services – from the perspective of both leading DXS providers (service companies) and large user enterprises. In addition to outlining the market structure and key service providers, it also presents in detail the future tasks, plans and challenges of major user companies from the German-speaking region. The survey is made available free of charge thanks to the support of Conclusion, Plan.Net Group, Reply, Syzygy and Valtech. We sincerely thank them for their valuable contributions and support.

We wish you an interesting and, above all, insightful read.

Kind regards,

Mario Zillmann



Management Summary

DIGITAL EXPERIENCE FOCUS TOPICS FOR THE NEXT TWO YEARS

56 %

Improving the employee experience

47 %

Digital commerce in the distribution of products and services

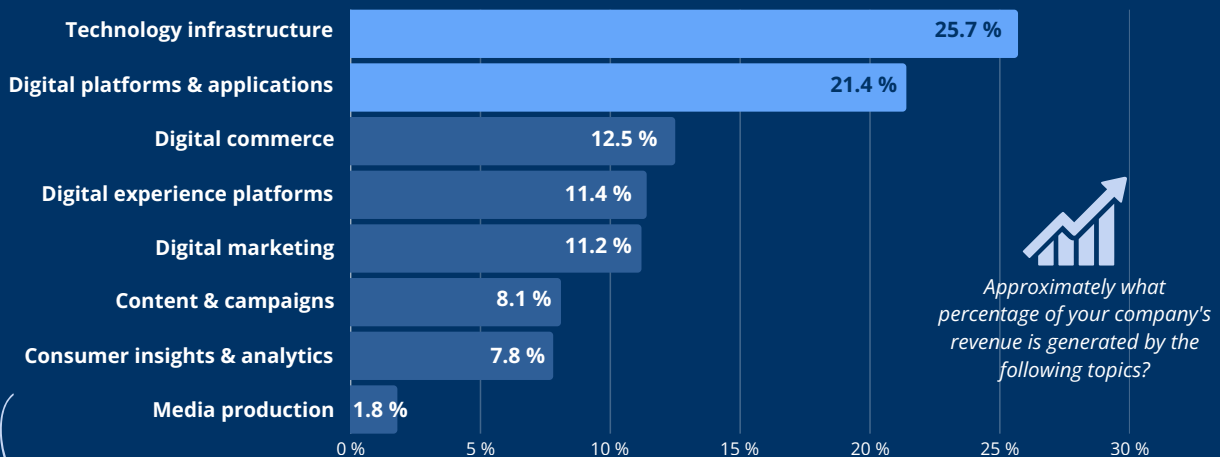
36 %

Expansion of core business to include digital and data-based business models

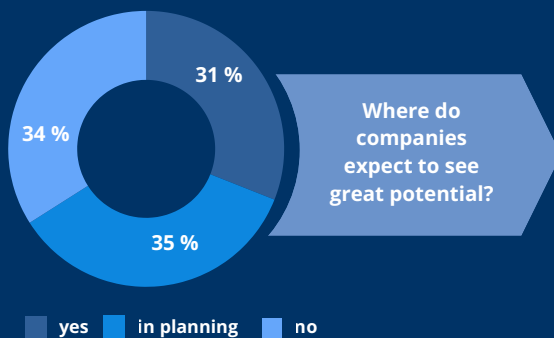
36 %

Promotion of social commerce and influencer marketing in sales

Revenue distribution of DX service providers: strong demand in the technology and platforms sector



Agentic AI: Almost a third of companies have already implemented AI agents



75 %

Conversational AI & chatbots



69 %

Customer data analysis & segmentation



65 %

Automated content creation

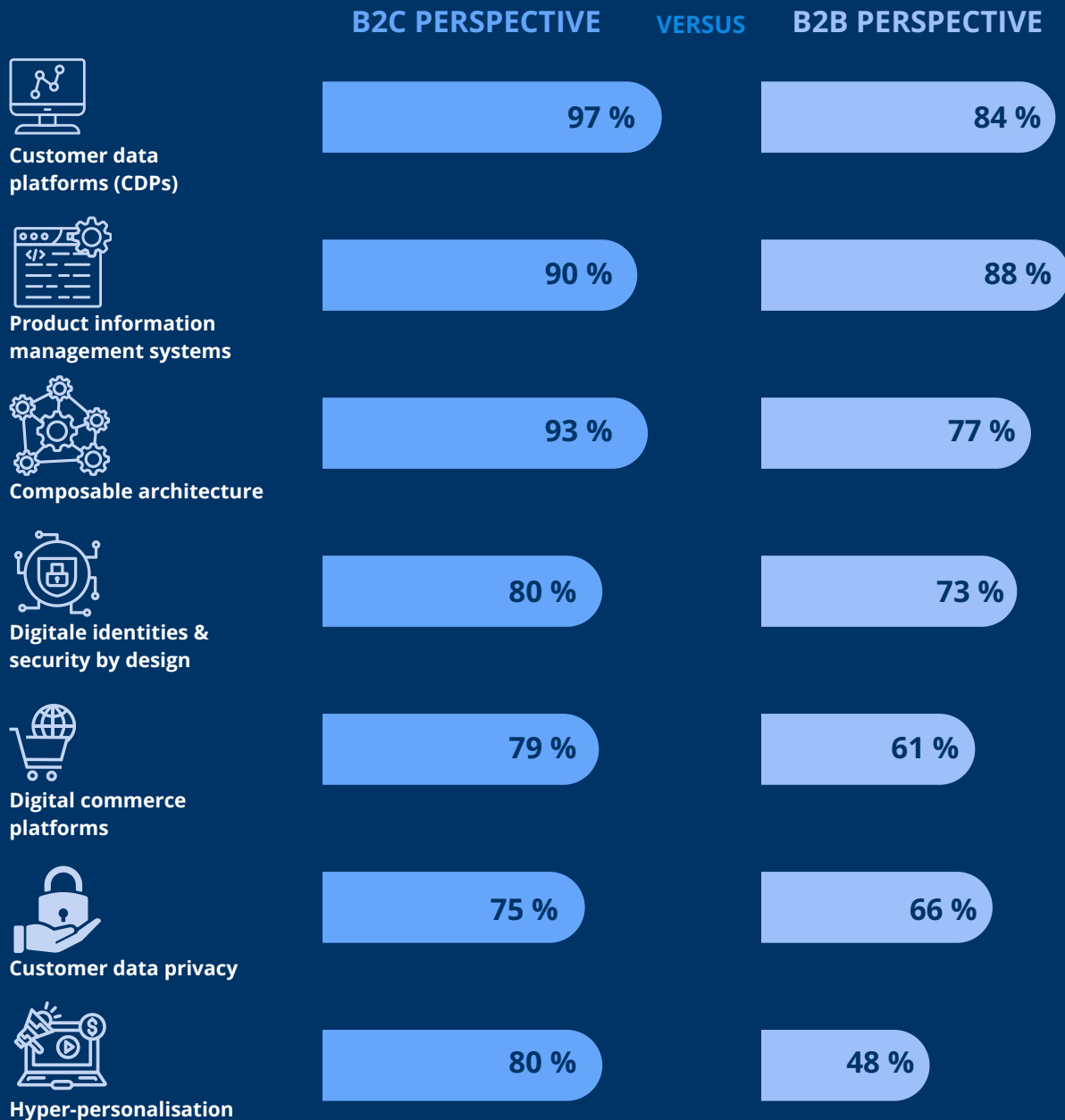


60 %

Language Assistants & Voice Interfaces



DX Technology trends 2027



Methodology and survey sample

As a market research and market analysis company, Lünendonk has been researching B2B service markets for over 40 years, focusing on Germany and German-speaking countries. While the IT services market has been researched since 1983, other markets such as management consulting, auditing and tax consulting, temporary employment and facility services have also been analysed over the years. The most important market developments and service providers in the respective markets are presented in the Lünendonk Surveys and Lists.

Lünendonk has been researching the Digital Experience Services (DXS) market segment since 2017. In 2020, the survey was expanded to include a Lünendonk List and a Lünendonk Portfolio, a visualisation of the market strength and portfolio breadth and depth of leading DXS service providers.

ABOUT THE SERVICE PROVIDER SURVEY

21 leading IT service providers, management consultancies and digital agencies operating in Germany participated in this year's survey. In the first stage, Lünendonk identified service providers that offer a DXS portfolio (consulting services, agency services, technology services).

In a second stage, these companies were contacted in writing and sent a questionnaire. The written Survey was conducted between May and August 2025. The number of participating service providers has remained constant for years, adjusted for acquired companies and companies that no longer have a DX focus due to portfolio changes. However, data from relevant DX service providers such as Publicis Sapient, Dept and Digitas has been missing for several years. Since this survey not only ranks service providers by revenue but also provides a qualitative assessment of their DX expertise and market strength, Lünendonk can only include service providers in this Survey who submit a questionnaire with information about their portfolio and other relevant key figures.

In the third stage, Lünendonk checked the information provided by the participating service providers. The survey included those service providers who submitted the questionnaire and met the criteria for inclusion in the survey.

166 user companies
and 21 DXS service
providers were surveyed
as part of the survey.

”

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The Market for Digital Experience Services in Germany

The survey looked at both service providers headquartered in Germany and the German subsidiaries of international providers. The information collected in writing via questionnaires was thoroughly checked for validity by Lünendonk; where necessary, information was researched further, and numerous background discussions were held with the survey participants.

To be categorised as a service provider in the Digital Experience Services segment and be eligible for inclusion in the Lünendonk® List, service providers must meet the following criteria:

- They must generate at least 60 per cent of their revenue from management and IT consulting, digital agency services, software development and implementation, or system integration.
- 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).
- Service providers whose DXS share of domestic revenue is between 30 and 50 per cent must generate at least 100 million euros with digital experience services in Germany. Service providers with a share of less than 30 per cent must generate at least 200 million euros with DX services in Germany.

INCLUSION CRITERION FOR LÜNENDONK LIST “LEADING PROVIDERS OF DIGITAL EXPERIENCE SERVICES”

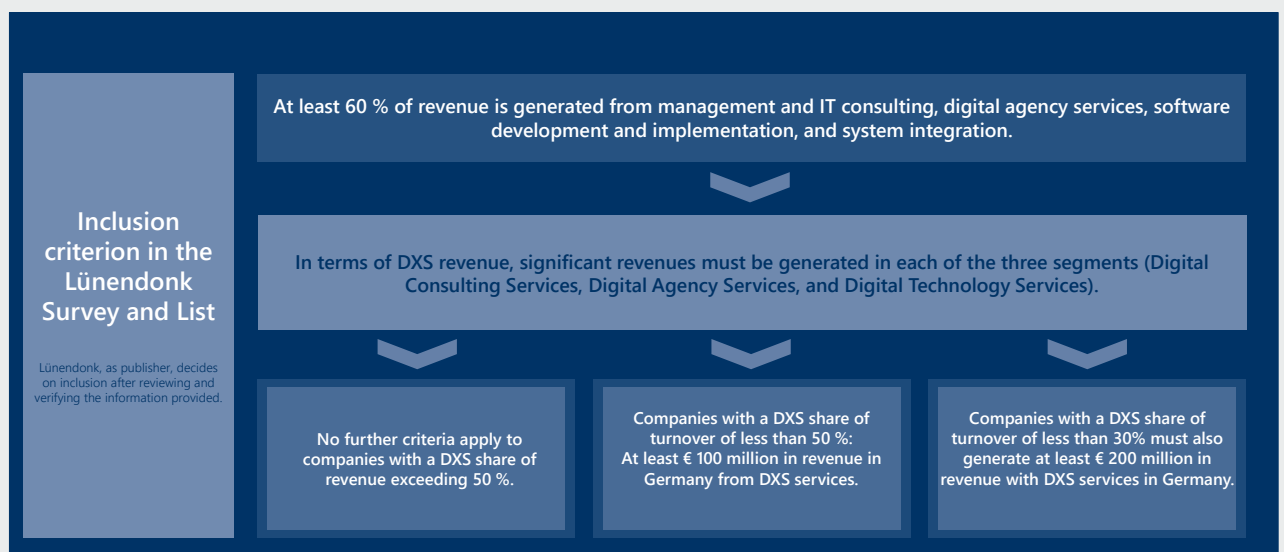


Fig. 1: Inclusion Criterion for Lünendonk Survey & List

Compliance with the criteria is verified based on the completed questionnaires, corresponding plausibility checks by Lünendonk and, in selected cases, detailed background discussions including the submission of skill distributions and references. Companies that participate but do not meet the criteria are not included in the survey. Individual responses from these companies are nevertheless considered for the survey, so that for some questions the number of cases (n) is higher than the number of companies included in the survey.

The leading providers – measured by domestic revenue – are included in the Lünendonk® List. A ranking based on DXS segment revenue is not provided, as the exact segment revenue for digital experience services cannot be validated from public sources, particularly in the case of hybrid service providers, and in some cases cannot be accurately determined even by the service providers themselves due to difficulties in defining the boundaries. This would therefore not allow for a reliable comparison.

As the Lünendonk® List claims to be complete and accurate, companies that have not completed a questionnaire but nevertheless meet the criteria and have the necessary size in Lünendonk's view are estimated and marked accordingly in the List as estimates.

ABOUT THE USER SURVEY

The second part of the survey focuses on the customer perspective. Between May and August 2025, 166 user companies were surveyed, mainly by telephone. The companies surveyed come from the industrial and automotive sectors, retail, consumer goods, finance, chemicals/pharmaceuticals, telecommunications and energy.

Just under half of the companies surveyed pursue a B2C business model, while around one in three companies operate in the B2B sector. The remaining companies are active in both segments to roughly the same extent.

Only companies from German-speaking countries were surveyed. The majority (72 %) are based in Germany, 18 per cent are based in Switzerland and 10 per cent are based in Austria. In terms of company size, 54 per cent of the companies have a revenue of up to one billion euros and are therefore upper mid-sized companies, while 46 per cent generate a revenue of more than one billion euros.

Both IT managers and marketing, sales and service managers were interviewed for the survey. In some cases, individuals from the strategy department or dedicated commerce and experience areas were also interviewed. Since B2C and B2B differ in terms of digital maturity and requirements for customer centricity and digital experience, significant differences were highlighted in the interpretation of the results.



METHODOLOGY AND SURVEY SAMPLE

The Market for Digital Experience Services in Germany

SAMPLE OF THE USER COMPANIES SURVEYED

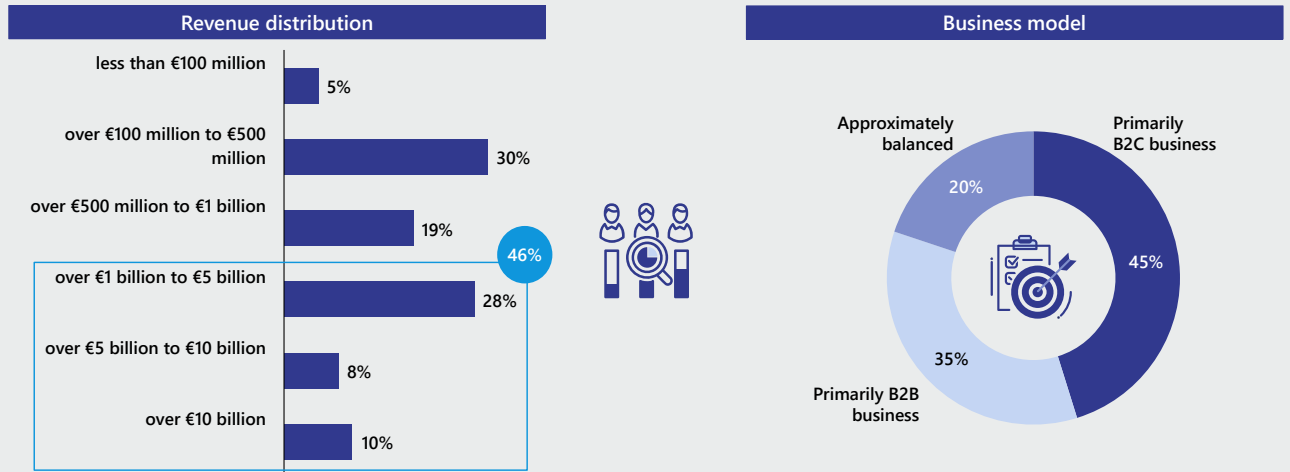


Fig. 2: Revenue; business model; all companies; n = 166

SAMPLE OF THE USER COMPANIES SURVEYED

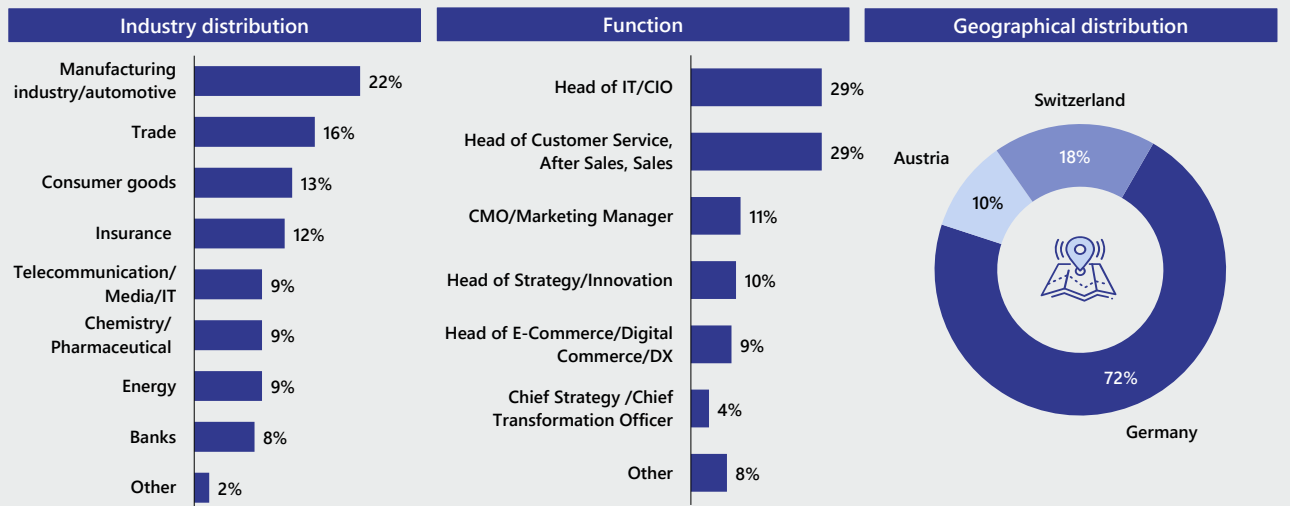


Fig. 3: Industry; function; location; all companies; n = 166

The basic distribution of companies in terms of their characteristics and the number of participating companies from 2024 was largely retained in this year's survey to enable a comparison of the results. However, as only a small proportion of identical companies and individuals were surveyed, a direct comparison of the results from different years cannot be statistically verified with certainty. The survey therefore does not claim to be representative, but it is still possible to identify trends and developments, and this has therefore been done.



List of participants of DXS service providers

Alphabetical list of participants	
]init[AG für digitale Kommunikation, Berlin	Merkle Germany GmbH, Frankfurt am Main
Accenture GmbH, Kronberg	msg systems ag, Ismaning
adesso SE, Dortmund	Plan.Net Germany GmbH & Co. KG, Munich
Capgemini Deutschland GmbH, Berlin	port-neo Group GmbH, Stuttgart
Conclusion DACH GmbH, Munich	PwC GmbH, Frankfurt am Main
Deloitte GmbH Wirtschaftsprüfungsgesellschaft, Munich	Reply Deutschland SE, Gütersloh
Deutsche Telekom MMS GmbH, Dresden	Syzygy AG, Bad Homburg
Diconium GmbH, Stuttgart	team neusta SE, Bremen
Exxeta AG, Karlsruhe	valantic GmbH, Munich
IBM Deutschland GmbH, Ehningen	Valtech GmbH, Düsseldorf
MAI Marketing Automation Intelligence GmbH, Hamburg	

In addition to the companies listed here, there are other service providers operating in the German DXS market. However, as already mentioned in the methodology section, either they did not submit a questionnaire for participation, making it impossible to make a reliable assessment without further information, or they narrowly failed to meet the participation criteria, but are nevertheless active in the DXS market. These include Cognizant, Dept, Digitas, EPAM, Infosys, Intive, Nexum, Publicis Sapient and TWT.



The market for digital experience services in Germany

Introduction: The digital experience services market segment

Lünendonk has been researching the market for digital experience services since 2017. Even back then, it was clear that digital technologies were having a major impact on marketing and sales and that a customer experience could be built primarily through consistent customer data and technologies such as cloud, automation and data analytics. Due to rapid technology cycles, new opportunities for efficiency and automation gains, and new customer requirements for their customer journey and interaction with products and digital services, companies have been investing in corresponding digitalisation projects for years. At the same time, 2023 and 2024 were economically challenging years, meaning that investments were only made in very specific areas or were often postponed. However, the fundamental trend towards driving forward digitalisation, establishing digital business models, networking customer interfaces and taking a holistic view of customer processes is continuing, meaning that digital experience services remain in high demand according to the latest Survey results – both in the B2C and B2B sectors.

Digital experience no longer just affects digital marketing, customer service and digital commerce, but permeates all functional areas such as supply chain, R&D and production in their digital transformation. Digital experience is also not just about introducing or modernising digital experience platforms.



INTRODUCTION: THE DIGITAL EXPERIENCE SERVICES MARKET SEGMENT

The Market for Digital Experience Services in Germany

In the digital age, true customer centricity can only succeed if processes and organisational structures are adapted, employees are empowered to use new technologies such as generative AI, agentic AI or spatial computing, and culture and traditional ways of working are rethought and adapted.

MANY CHALLENGES REMAIN ON THE PATH TO CUSTOMER CENTRICITY AND TECHNOLOGY-DRIVEN EXPERIENCECENTRICITY UND TECHNOLOGY-DRIVEN EXPERIENCE

Digital transformation, technological developments and the associated changes in consumer expectations regarding experience and the customer journey present companies with a wide range of challenges. In particular, the development and integration of AI solutions into DX processes poses a major challenge for 65 per cent of companies. As will become clear later in the AI chapter, there are various issues to consider here: suitable data architectures, data management, security and data protection challenges, and the right upskilling of employees.

CHALLENGES: AI INTEGRATION AND EXPERIENCE ORCHESTRATION POSE PROBLEMS FOR MANY COMPANIES

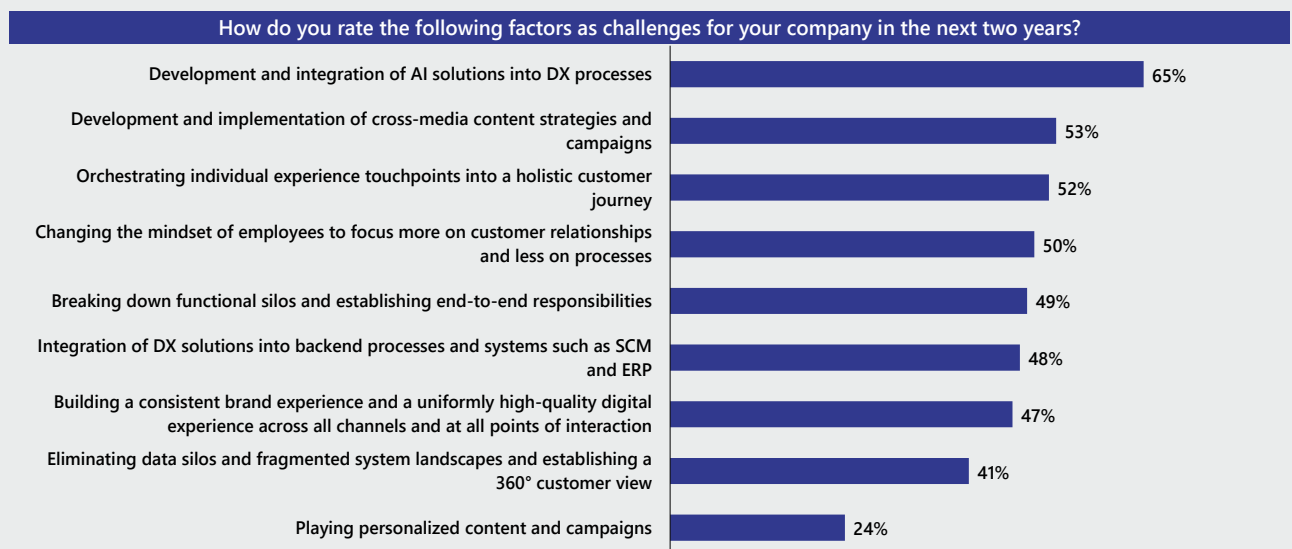


Fig. 4: How do you rate the following factors as challenges for your company in the next two years?; scale from 1 = "no challenge" to 4 = "very big challenge"; responses shown refer to "big challenge" and "very big challenge"; all participants; n = 163 (2025); n = 142 (2024)

The Market for Digital Experience Services in Germany

Around half of the survey participants see the cross-media delivery of content (53 %), the orchestration of customer touchpoints into a holistic customer journey (52 %) and the creation of a consistent brand experience across all interaction points (47 %) as challenges. Accompanying customers across multiple touchpoints and taking a holistic view of customer behaviour therefore remain key challenges. For many companies, however, this also requires organisational changes, the dismantling of silos and the creation of end-to-end accountability, which 49 per cent also see as a challenge.

Consequently, integrating DX solutions into central systems such as ERP, CRM or SCM poses a challenge for every second company (48 %). ERP systems often have a monolithic architecture and therefore rarely offer suitable interfaces. However, these are necessary to integrate customer processes with underlying business processes so that customers receive transparent, real-time information about availability, delivery status or service, enabling a seamless end-to-end experience across all touchpoints.

FOCUS TOPICS FOR THE NEXT TWO YEARS

These challenges consequently lead to focus areas in which companies want to concentrate their investments in the coming years. For 56 per cent of user companies, the focus is on improving the employee experience by providing applications with high UX and all data relevant for use. This should make work easier for employees and increase productivity and the quality of outcomes. This development illustrates that the increasing complexity of work processes and the ongoing shortage of skilled workers will prompt companies to provide their employees with the best possible support in the form of intuitive and efficient digital solutions.

Around half of the companies surveyed (47 %) want to focus even more strongly on digital commerce than before. Larger companies with revenues of over one billion euros are particularly keen to expand their digital commerce activities. In a sector comparison, almost all the retail companies surveyed (88 %) are keen to further expand their digital commerce business. They also report above-average values for the other topics surveyed. However, most of the banks (64 %) and insurance companies (63 %) surveyed also want to further expand their digital commerce in the future.

Just under a third of survey participants (36 %) want to expand their existing business with new digital or data-based business models – banks (50 %) and insurance companies (53 %) are significantly more likely to be planning this. In addition, the companies surveyed will continue to rely on data as a source of efficiency gains, but also for tapping into additional revenue streams.

53 %

of companies face
challenges in the cross-
media distribution of
content.

”

The Market for Digital Experience Services in Germany

DXS IS INCREASINGLY FOCUSING ON THE EMPLOYEE EXPERIENCE AND DIGITAL COMMERCE



Fig. 5: To what extent will your company be dealing with the following issues in the next two years?; scale from 1 = "not at all" to 4 = "very strongly"; responses shown refer to "strongly" and "very strongly"; relative frequency distribution; all companies; n = 136-146 (2024); n = 155-166 (2025); *) Not surveyed in 2024

In contrast, significantly fewer companies (28 %) are pushing ahead with the development of completely new data-based business models, although here too, every second bank and insurance company surveyed is working on new business models in addition to its core business.

DIGITAL EXPERIENCE: MARKETING, SALES, CREATIVITY, DATA AND TECHNOLOGY ARE CONVERGING

Due to increasingly overlapping portfolios, it is becoming increasingly difficult to clearly distinguish between the markets for management consulting, IT consulting and system integration, and digital agencies. All three groups of providers are therefore considered important by user companies. Lünendonk therefore refers to the intersection of these three markets in terms of the implementation of digitalisation strategies with customer-centric content as "digital experience services". Service providers with a mature portfolio and extensive skills and resources in the areas of digital consulting services, digital agency services and digital technology services are presented in this survey. This holistic approach is becoming increasingly important, primarily because customer-centric strategies are increasingly defined by digital technologies, but content and campaigns must also be adapted to these technologies or be compatible with them. At the same time, there is a great need for advice on what customer strategies of the future will look like and how technologies can be used and scaled correctly to create a high-quality experience and thus customer loyalty.



INTRODUCTION: THE DIGITAL EXPERIENCE SERVICES MARKET SEGMENT

The Market for Digital Experience Services in Germany

DIGITAL EXPERIENCE SERVICES – AN INTERDISCIPLINARY APPROACH COMBINING CONSULTING, AGENCY, AND TECHNOLOGY SERVICES

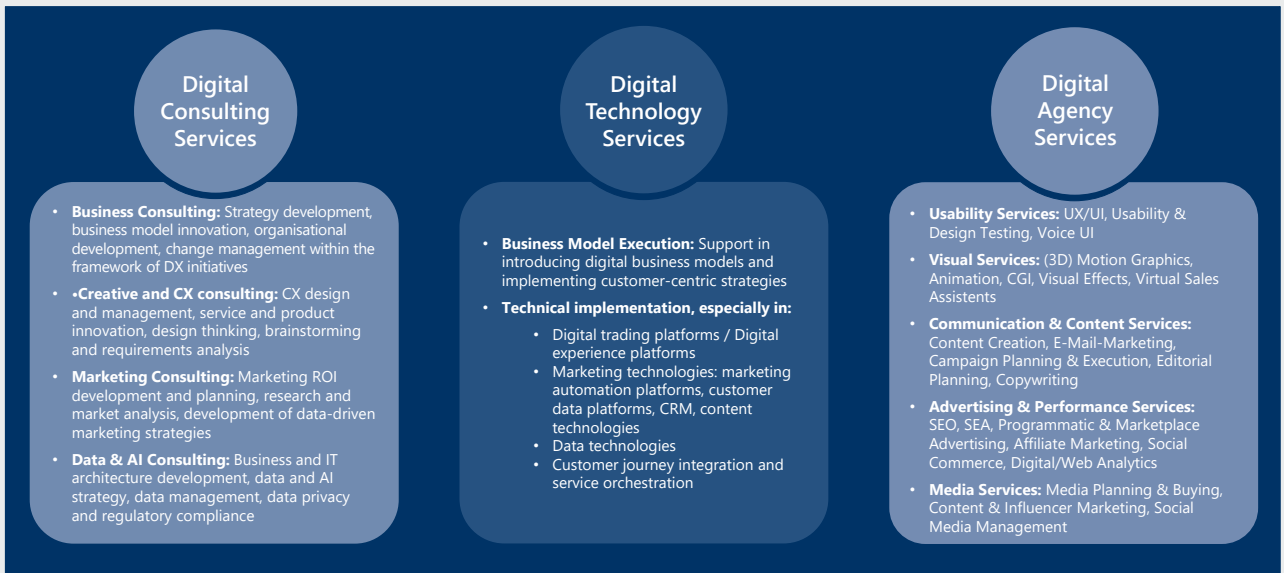


Fig. 6: Overview of the Digital Experience Services approach

To provide customers with comprehensive support for customer-centric strategies, DXS service providers must demonstrate an extensive portfolio in the following areas:

- **Discover & Define:** Strategy consulting, customer journey mapping, identification of relevant use cases and business value definition
- **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 and experience design
- **Platform & Architecture:** Selection, implementation and integration of digital experience platforms, API management and development of scalable and secure system architectures
- **Build & Integrate:** Development of customised applications, interface integration into ERP, CRM and SCM systems, and implementation of microservices
- **Run, Govern & Orchestrate:** Operation and further development of platforms, governance models for data and processes, orchestration of the end-to-end customer journey, and continuous optimisation



INTRODUCTION: THE DIGITAL EXPERIENCE SERVICES MARKET SEGMENT

The Market for Digital Experience Services in Germany

DIGITAL EXPERIENCE VALUE CHAIN

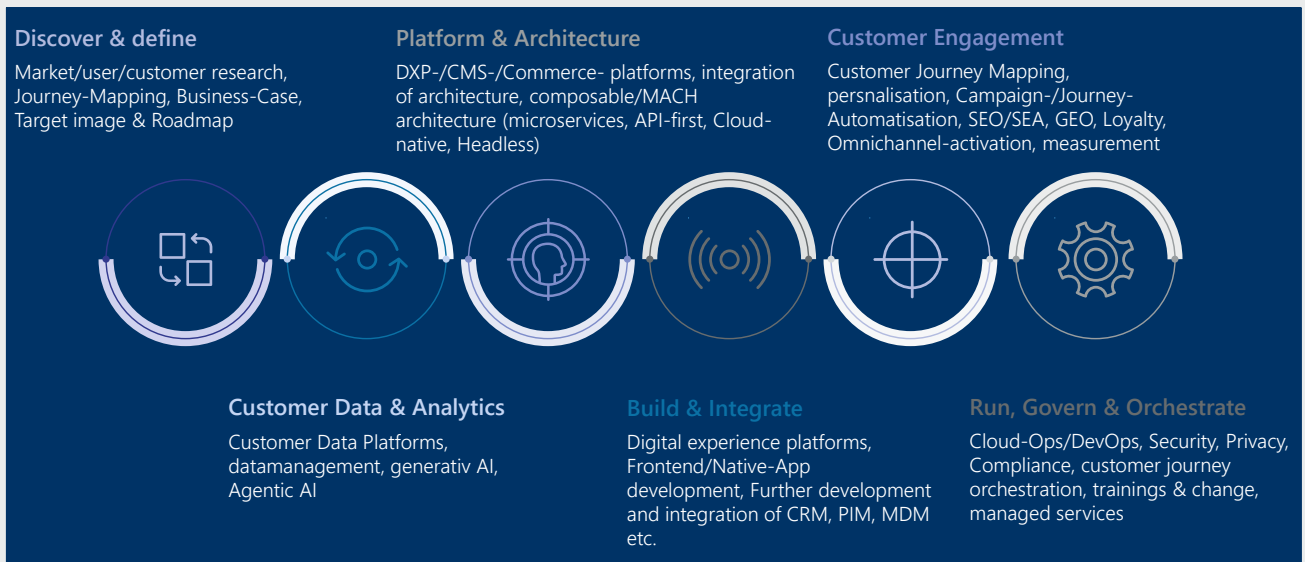


Fig. 7: Overview of the digital experience value chain

DXS SERVICE PROVIDERS RECEIVE PROJECT ENQUIRIES FROM VARIOUS AREAS OF THE COMPANY

As marketing and sales strategies become increasingly intertwined with other functional areas such as supply chain, R&D, and production, digital experience is no longer an isolated marketing and sales issue, but affects a variety of different functional areas that either have customer interfaces (e. g., logistics, customer service) or for which digital experience has become highly relevant in interactions with suppliers and customers or for their own employees: Although DXS service providers receive most project enquiries from marketing, sales, service and IT, 58 per cent also state that operations departments frequently submit enquiries – for example, to show customers real-time data on delivery stocks or when it comes to developing supplier portals.



INTRODUCTION: THE DIGITAL EXPERIENCE SERVICES MARKET SEGMENT

The Market for Digital Experience Services in Germany

PROJECT REQUESTS USUALLY COME FROM MARKETING AND SALES, BUT IT AND OTHER DEPARTMENTS ARE ALSO RELEVANT

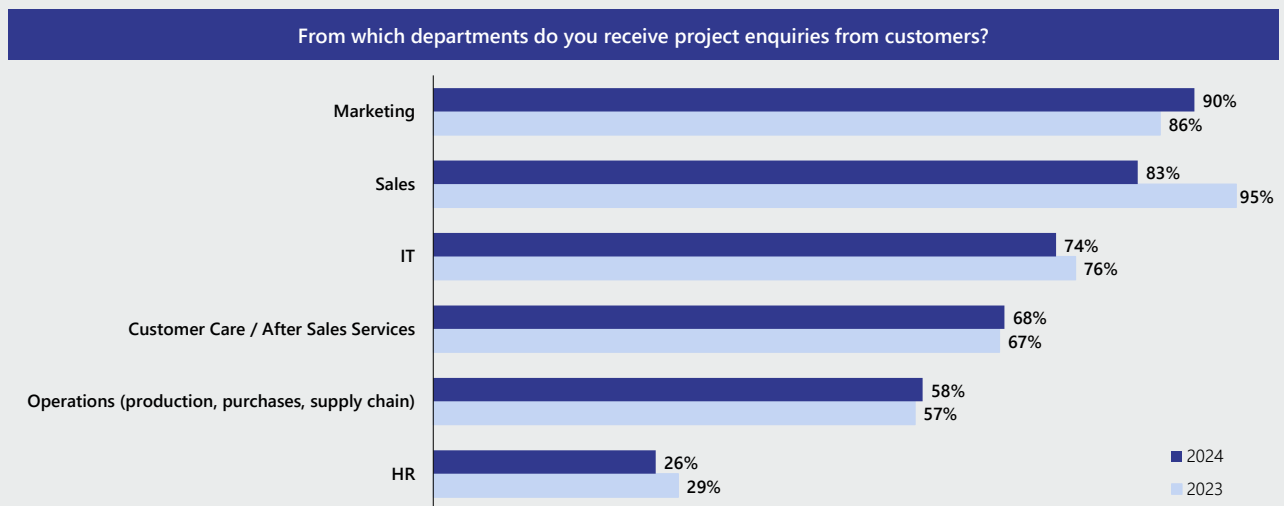


Fig. 8: From which specialist areas do you receive project enquiries from customers?; scale from 1 = "never" to 4 = "very often"; responses shown refer to "often" and "very often"; relative frequency distribution; all companies; n = 21 (2023); n = 19 (2024)

FULL-SERVICE SHARE INCREASES IN CUSTOMER PROJECTS

The statements made by the user companies surveyed by Lünendonk show that an interdisciplinary portfolio such as the one described above is gaining in importance: 83 per cent consider an integrated approach, in which strategy, data, creation, media, system integration and the operation of platforms and IT applications are considered together, to be important for creating a high-quality digital experience.

However, the actual implementation shows a more nuanced picture: one third (34 %) already rely on it regularly, another 47 per cent at least frequently, but just under one in five companies (19 %) only rarely or never. Medium-sized companies with a revenue of less than 500 million euros are less likely to rely on this integrated approach.



INTRODUCTION: THE DIGITAL EXPERIENCE SERVICES MARKET SEGMENT

The Market for Digital Experience Services in Germany

END-TO-END APPROACH IS CONSIDERED A SUCCESS FACTOR AND IS INCREASINGLY BEING IMPLEMENTED BY USER COMPANIES

"In order to inspire our customers with a digital experience throughout the entire customer journey, disciplines such as strategy, data & analytics, creation, design, media production, system integration, and platform operation must be considered in a fully integrated manner."



83 per cent

of survey participants confirm this statement.

How often is this end-to-end approach already being considered in digital experience projects at your company?

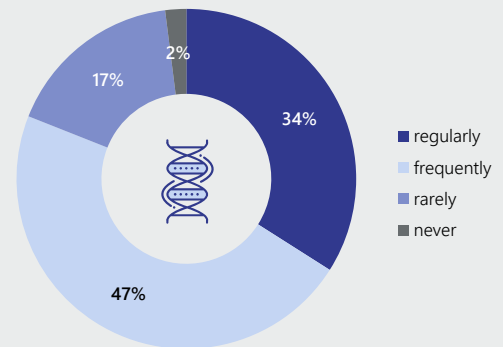


Fig. 9: How do you rate the following statement?; scale from 1 = "disagree" to 4 = "strongly agree"; responses shown refer to "somewhat agree" and "strongly agree"; relative frequency distribution; all companies; n = 162

How often is this end-to-end approach already being considered in digital experience projects at your company?; scale from 1 = "never" to 4 = "regularly"; relative frequency distribution; all companies; n = 132



Revenue distribution and portfolio focus of DXS service providers

According to Lünendonk, the leading providers of digital experience services have different areas of focus in their portfolios, depending on the definition of the market segment. These are divided into digital consulting services, digital agency services and digital technology services. Since both large consulting and IT service providers, which offer a wide range of other services in addition to digital experience services and cover various other topics, and DXS specialists, which are digital agencies offering exclusively or predominantly DX services, are participating in the survey, corresponding comparison groups (DXS specialists and generalists) are presented in individual cases.

On average, all DXS providers surveyed will generate 75.9 per cent of their total revenue with digital experience services in 2024. Among the twelve DXS specialists surveyed (focus: digital agencies), the average share of DXS revenue is 97.3 per cent. These service providers are listed in the Lünendonk sub-ranking "Leading DXS Specialists in Germany".

Among generalists, which include much broader service providers as well as management consultancies and IT consultancies with significant DX revenues, the average DXS revenue share is still 39.1 per cent, which shows that DX services now account for a large part of the demand for IT services.

REVENUE DISTRIBUTION: CONSULTING AND TECHNOLOGY ARE BECOMING MORE IMPORTANT, AGENCY SERVICES ARE DECLINING

There are also significant differences between the provider groups in terms of the distribution of revenue from the DXS portfolio. While generalists generate an average of 32.5 per cent of their DXS revenue from digital consulting services, this figure is more than three percentage points lower for specialists at 29.2 per cent. By contrast, the share of revenue generated by digital agency services is above average among DXS specialists: on average, 21.8 per cent is generated by agency services. Generalists achieve only 17.9 per cent. In terms of digital technology services, the share of revenue is (now) almost equal; in recent years, DXS specialists have caught up in this area.

75.9 %
of providers' revenue
comes on average
from Digital Experience
Services.



The Market for Digital Experience Services in Germany

DXS REVENUE SHARES CONTINUE TO CONVERGE – LARGE IT SERVICE PROVIDERS ARE FOCUSING MORE STRONGLY ON DIGITAL CONSULTING

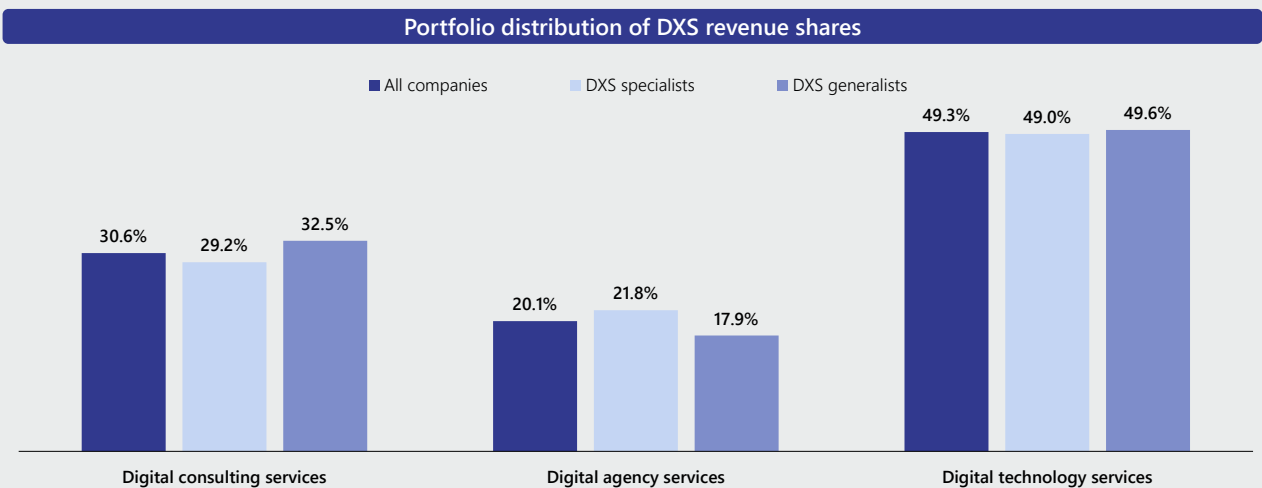


Fig. 10: What percentage of your total revenue in Germany did your company generate in each of the following three categories?; relative frequency distribution; n = 21 (all companies); n = 12 (DXS specialists); n = 9 (DXS generalists)

DXS SPECIALISTS UNDER PRESSURE: CHANGES TO THE BUSINESS MODEL ARE ALTERING REVENUE DISTRIBUTION

A comparison of the annual figures clearly shows that the business of traditional digital agencies has changed significantly in recent years. While agency services still accounted for an average of 29.2 per cent of DXS revenue in 2022, this share has now fallen to just 21.8 per cent. Not all DXS specialists have been able to compensate for this decline with consulting and IT services in recent years: the chapter "Revenue development and forecasts" shows that the revenue of DXS specialists declined by an average of 2.5 per cent in 2024. A key reason for the decline in the agency share is the increasing influence of AI, which allows creative and content services to be produced more efficiently and (partially) automatically. Although the number of participants varies in the figures presented, an analysis of the figures for those DXS specialists who participated in the survey in all three years shows that the distribution of revenue is developing in an almost identical manner.

Technology services, on the other hand, have gained in importance among DXS specialists: while 44.4 per cent of revenue was generated in 2022 with services such as system integration and DX platform operation, the share is now 49.0 per cent, which is on a par with DXS generalists. The skill set of DXS specialists has thus shifted in favour of more technological competencies. This development is understandable, as more marketing topics are strongly technology driven. Similarly, the share of revenue from digital consulting services has increased slightly from 26.2 per cent in 2022 to 29.2 per cent today.



The Market for Digital Experience Services in Germany

DXS SPECIALISTS: DIGITAL AGENCY SERVICES GENERATE SIGNIFICANTLY LESS REVENUE – GROWTH IN CONSULTING AND TECHNOLOGY SERVICES

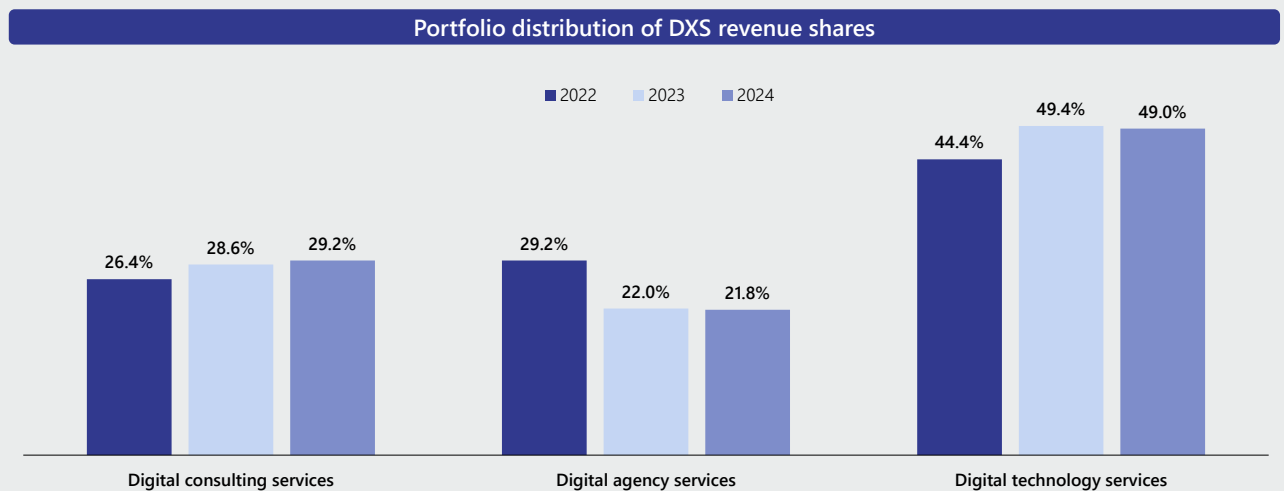


Fig. 11: What percentage of your total revenue in Germany did your company generate in each of the following three categories?; relative frequency distribution; DXS specialists; n = 17 (2022); n = 16 (2023); n = 12 (2024)

REVENUE DISTRIBUTION BY TOPIC: TECHNOLOGY DOMINATES – AND IS BECOMING EVEN MORE IMPORTANT

In addition to revenue trends, the survey also examined how revenue is distributed across individual DX services and how it will develop in the coming year. Just under half of the revenue generated by the DXS service providers surveyed comes from digital platforms and applications as well as technology infrastructure (including the provision of cloud infrastructure and IT backend). In-house developed software solutions and the implementation and customisation of standard DX software solutions thus form the core of the business – and are expected to grow further in 2026. Similarly, the share of revenue generated by digital experience platforms, that is DX software solutions that help companies deliver consistent, personalised and cross-channel customer experiences throughout the entire customer journey and manage them centrally, is also expected to increase slightly.

By contrast, the share of revenue generated by digital commerce is expected to decline slightly. This is partly due to the fact that, in the wake of the coronavirus pandemic, there was heavy investment in digital commerce solutions between 2020 and 2023, and investment is now no longer growing as strongly or is being directed towards other areas of focus.



REVENUE DISTRIBUTION AND PORTFOLIO FOCUS OF DXS SERVICE PROVIDERS

The Market for Digital Experience Services in Germany

Digital marketing, content, campaign management and media production are also expected to lose market share, which, according to Lünendonk, is primarily due to increasing pressure on fees resulting from more intense competition and the growing use of artificial intelligence.

Here, too, there are differences between DXS specialists and generalists: while the former generated an average of around eleven per cent with content and campaigns in 2024, the share for generalists was only around four per cent. However, the increasing use of AI is changing both project volumes and fee models.

In contrast, generalists achieved 34 per cent with technology infrastructure, while specialists achieved only 19 per cent. When it comes to digital platforms & applications and digital experience platforms, however, the two groups are on a similar level.

REVENUE DISTRIBUTION: RISING DEMAND EXPECTED IN THE TECHNOLOGY AND PLATFORMS SECTOR

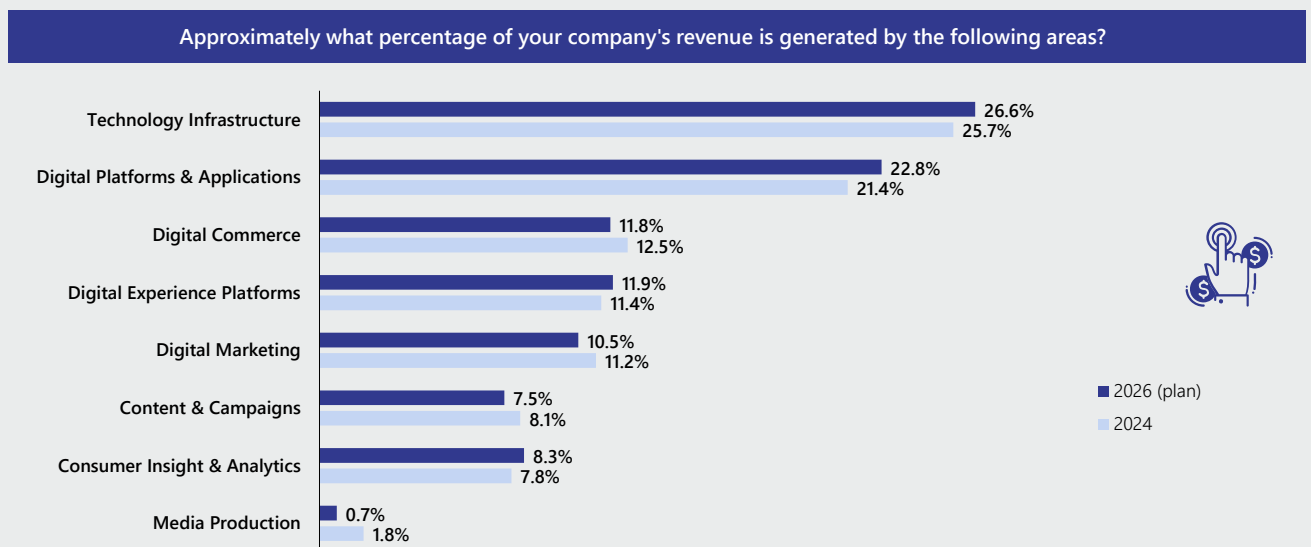


Fig. 12: Approximately what percentage of your company's revenue is generated by the following areas?; mean values; all companies; n = 12

Lünendonk List 2025: Leading DXS providers in Germany

The Lünendonk List presents the leading providers of digital experience services (DXS). Lünendonk does not rank companies according to DXS segment revenue, as the exact segment revenues for digital experience services cannot be validated from public sources, particularly in the case of hybrid consulting and IT service providers, and many service providers are not always able to clearly distinguish their revenues in segments such as digital experience services from their other services, which leads to inaccuracies. This means that it would not be possible to provide an accurate representation of revenues from digital experience services and a reliable comparison.

However, the Lünendonk List provides information on how the revenues from digital experience services reported to Lünendonk by service providers are distributed across the three areas of digital consulting, digital agency services and digital technology services, and thus on how broadly the individual service providers are positioned. A detailed description of the individual service providers follows on the next few pages.



The Lünendonk Portfolio in the following chapter, on the other hand, provides detailed information on the market strength of the individual service providers, based on the data reported to Lünendonk on revenue from digital experience services, customer and delivery structure, portfolio strength and competence assessments by the user companies surveyed. In addition, the Lünendonk sub-ranking shows those service providers that generate at least 75 per cent of their revenue with digital experience services and are therefore almost entirely active in this segment.

As in previous years, there are several changes in this year's Lünendonk List compared to last year. While Digitas and Intive are no longer part of the ranking and portfolio presentation due to a lack of information, Merkle and MAI have been newly included.



LÜNENDONK LIST 2025: LEADING DXS PROVIDERS IN GERMANY

The Market for Digital Experience Services in Germany

LÜNENDONK LIST 2025: LEADING PROVIDERS OF DIGITAL EXPERIENCE SERVICES IN GERMANY

Rank	Company	Revenue in Germany in million euros	Digital experience service portfolio – revenue share with ...		
			Digital Consulting	Digital Agency	Digital Technology
1	Accenture GmbH, Kronberg *) 1) 2)	3,400.0	● ●	● ●	● ● ●
2	Capgemini Deutschland GmbH, Berlin *) 1) 2)	2,250.0	● ●	●	● ● ●
3	IBM Deutschland GmbH, Ehningen *) 1)	2,200.0	● ●	● ●	● ● ●
4	Deloitte GmbH, Munich 3)	1,549.0	● ●	●	● ● ●
5	PwC GmbH, Frankfurt am Main 3)	1,458.0	● ● ●	●	● ● ●
6	adesso SE, Dortmund 2)	1,073.1	● ●	● ●	● ● ●
7	msg systems ag, Ismaning	968.1	● ●	●	● ● ●
8	Reply Deutschland SE, Gütersloh *)	470.0	● ●	●	● ● ●
9	valantic GmbH, Munich	345.0	● ● ●	●	● ● ●
10	Plan.Net Germany GmbH & Co. KG, Munich 4)	248.0	● ●	● ●	● ●
11	Deutsche Telekom MMS GmbH, Dresden	232.0	● ●	●	● ● ●
12]init[AG für digitale Kommunikation, Berlin	197.3	● ● ●	●	● ● ●
13	Diconium GmbH, Stuttgart	188.0	● ●	●	● ● ●
14	Exxeta AG, Karlsruhe	128.0	● ●	●	● ● ●
15	Valtech GmbH, Düsseldorf	97.7	● ●	● ●	● ● ●
16	team neusta SE, Bremen 4) 5)	91.2	● ●	● ●	● ● ●
17	Conclusion DACH GmbH, Munich 6)	90.6	●	●	● ● ●
18	Syzygy AG, Bad Homburg	56.4	● ●	● ●	● ●
19	Merkle Germany GmbH, Frankfurt am Main 4)	44.5	● ● ●	●	● ● ●
20	MAI Marketing Automation Intelligence GmbH, Hamburg	31.0	●	● ●	● ● ●

The Market for Digital Experience Services in Germany

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) Revenue also includes revenue from management consulting.
- 2) Figures include acquisitions.
- 3) Figures refer to the advisory
- 4) Revenue represents fee income.
- 5) Figures include disposals.
- 6) Merger of Conclusion and diva-e in 2024.

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

TOP 5: ACCENTURE, CAPGEMINI, IBM, DELOITTE AND PWC

As the world's largest consulting and IT services group, Accenture also leads the DXS market in Germany. Although Accenture does not disclose its revenue from digital experience services, Lünendonk estimates that Accenture is the market leader in Germany. According to the [Lünendonk List of "Leading IT consulting and system integration companies in Germany."](#) Accenture is the IT consulting and system integration company with the highest revenue in Germany, with an estimated revenue of 3.4 billion euros. With Accenture Song, it has its own digital unit, which is the world's largest digital agency according to the international Ad Age Agency Ranking.



The Market for Digital Experience Services in Germany

In addition to the acquisition of Mindcurv in 2024, Accenture has acquired several other DX and digital commerce companies in Germany and internationally in recent years. In June 2025, Accenture announced that it would be adapting its business model and internal structures to respond more flexibly and quickly to customer needs because of the increasing relevance of AI and the growing pressure to transform. To this end, Song will be integrated into the new Reinvention Services business unit, among other things. In addition, Accenture Song will be led globally by Ndidi Oteh from 2025, replacing the current CEO David Droga.

As in the previous year, Capgemini follows in second place with an estimated total revenue in Germany of 2.25 billion euros. Capgemini Invent bundles the areas of management consulting, innovation, design and transformation. The digital agency frog, which was acquired in 2021, is also part of Capgemini Invent and focuses on topics related to digital experience. With an estimated total revenue in Germany of 2.2 billion euros, IBM is closing in on Capgemini. The DX portfolio is bundled in the experience agency IBM iX. Aperto and ecx.io, which were acquired several years ago, have also been operating on the market as IBM iX since 2022.

As in the previous year, fourth and fifth place are occupied by the auditing and tax consulting firms Deloitte and PwC. Both are also among the world's largest management consultancies and digital agencies and, alongside Accenture and IBM, were among the first consulting groups to establish their own units in digital marketing and customer experience. Deloitte is just ahead of PwC with domestic revenue of 1.55 billion euros compared to 1.46 billion euros. The revenue figures shown in the Lünendonk List refer only to the advisory business, which is bundled with the digital experience services business.

RANKS 6 TO 10: ADESSO, MSG, REPLY, VALANTIC, PLAN.NET

Adesso will generate over one billion euros in Germany for the first time in 2024. The IT service provider, headquartered in Dortmund, will thus overtake msg, which will generate just under one billion euros. adesso bundles its DX activities in the "Digital Experience" division, while msg does so under "msg digital".

In seventh place, with a significant jump in revenue, is Reply, with an estimated revenue of 470 million euros in Germany. Compared to other DXS generalists, Reply has a much stronger focus on digital experience services and is therefore positioned among the market leaders in the qualitative portfolio presentation of DX service providers in the segment. As in the previous year, valantic ranks ninth with total domestic revenue of 345 million euros. All of the above revenues are total revenues generated in Germany, that is they include revenues from other services in addition to digital experience services.



The Market for Digital Experience Services in Germany

This means that the ranking in places one to nine does not reflect the actual size of all listed service providers in the market for digital experience services but nevertheless provides an indication of the leading service providers in this market, as all of the service providers listed here generate three-digit million revenues with digital experience services.

In tenth place is the Plan.Net Group, the first DXS specialist and one of those service providers that generates almost all of its revenue from DX services. Plan.Net is a subsidiary of Serviceplan, Europe's largest owner-managed agency group, which generated fee revenues of 866 million euros in the 2024/2025 financial year (July to June). Within Service plan, the Plan.Net Group is responsible for the technological implementation of the creative and advertising services developed, as well as media marketing.

RANKS 11 TO 20: TELEKOM MMS, INIT, DICONIUM, EXXETA, VALTECH, TEAM NEUSTA, CONCLUSION, SYZYG, MERKLE, MAI

The second half of the ranking is dominated almost exclusively by DXS specialists, starting with Telekom MMS with domestic revenue of 232 million euros. As part of a strategic realignment, T-Systems MMS moved to Deutsche Telekom AG in 2023 and has since been operating under the name Deutsche Telekom MMS. This is intended to bring Telekom MMS closer to Telekom Deutschland's medium-sized business customers.

init, which specialises in the public sector, recorded a 12 per cent decline in revenue to 197 million euros in 2024, but remains in 12th place. Close behind is diconium with 188 million euros. Since 2020, diconium has been a wholly owned subsidiary of VW. With domestic revenue of 128 million euros, Exxeta ranks 14th. Places 15 and 16 generate just under 100 million euros – Valtech (€ 97.7 million) and team neusta (€ 91.2 million). The two companies have swapped places compared to last year.

Conclusion follows in 17th place. The merger of diva-e and Conclusion has created a strong provider of digital transformation in Germany. diva-e Conclusion is responsible for the DXS portfolio within Conclusion and has once again confirmed its leading market position with 17th place. Places 18, 19 and 20 go to Syzygy (€ 56.4 million), Merkle (€ 44.5 million) and MAI (€ 31.0 million). Merkle and MAI were newly included in the ranking this year: while Merkle ranked 21st in the 2024 Survey and thus slipped out of the Lünendonk List, MAI – an acronym for marketing, automation and intelligence – was included for the first time. The MAI Group was formed in 2022 through the merger of seven independent digital agencies. In June 2024, it acquired the UX agency result. It is supported in this by as the investor Auctus Capital Partners, which holds a majority stake in the company.



The main competitors in the DXS market

The market for digital experience services in Germany is characterised by a heterogeneous field of providers. While international consulting and IT groups such as Accenture, Capgemini, Deloitte, IBM and PwC have been among the world's largest providers of digital experience services for almost a decade, IT service providers such as adesso, msg, Reply and valantic have also built up a high level of DX expertise in recent years by strengthening their classic digital agency services or recruiting know-how. In addition, there are service providers that have their origins in the digital agency market and have built up consulting and IT expertise in recent years, resulting in a broad interdisciplinary portfolio. These include Plan.Net Group, Conclusion and Valtech, among others.

ACCENTURE DOMINATES THE MARKET FOR FULL-SERVICE PROVIDERS IN GERMANY AS THE MOST IMPORTANT COMPETITOR

Which companies are your four most important competitors as a full-service provider of digital experience services in Germany?

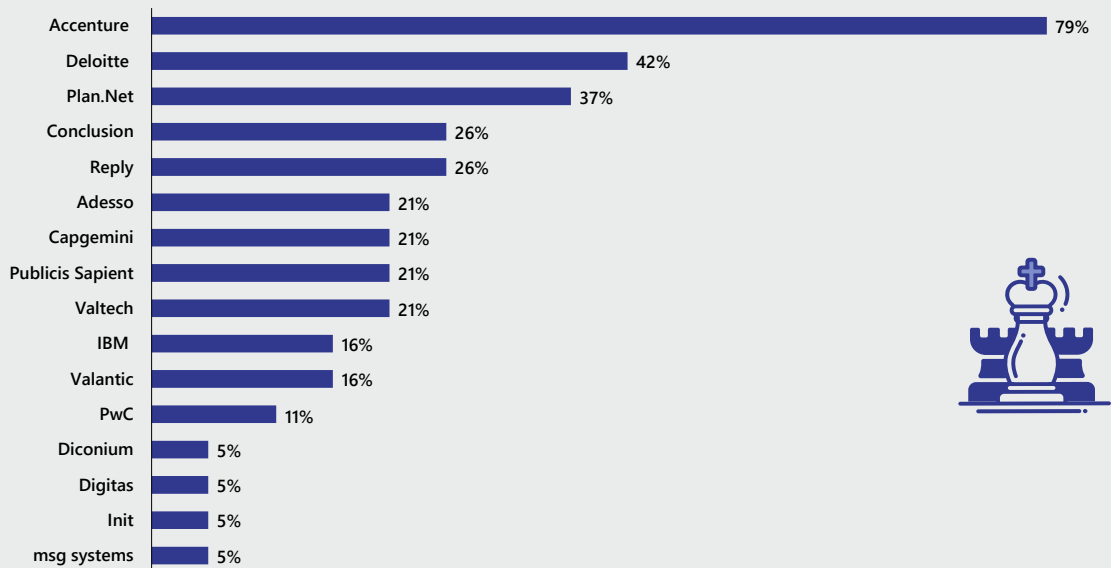


Fig. 13: Which companies are your four most important competitors as full-service providers of digital experience services in Germany?; mean values; all companies; n = 19

In addition to the Lünendonk List, which shows the leading DXS service providers in terms of revenue in Germany, another interesting perspective is which companies the service providers surveyed perceive as their most important competitors.



THE MAIN COMPETITORS IN THE DXS MARKET

The Market for Digital Experience Services in Germany

Accenture leads the field by a clear margin: 79 per cent of DXS service providers name the IT group as one of their most important competitors. As in the previous year, Deloitte follows, named as an important competitor by 42 per cent of participants. However, Deloitte has lost a few percentage points compared to last year's survey (2024: 55 %). Plan.Net, on the other hand, has gained significantly in relevance; the DXS specialists surveyed see Plan.Net as one of the most important competitors. Reply and Conclusion also received a significant share of mentions as one of the most important competitors in the DXS market, with 26 per cent each.

ACQUISITIONS AND CHANGES IN THE DXS MARKET

The strong market position of some DXS providers is also linked to the fact that they have acquired relevant DX service providers in recent years, thereby gaining market strength in the DXS segment. The trend towards more interdisciplinary tenders, for which service providers need a full-service portfolio, has also led to market consolidation.

In 2024, two activities in particular attracted attention: Firstly, Accenture acquired Mindcurv. With around 700 employees, Mindcurv was itself part of the Lünendonk Lists in the DXS sector in recent years and focuses on data & analytics, digital commerce and cloud-native software development. Accenture is thus primarily strengthening its DX division Accenture Song with additional capacity and expanding its portfolio.

Secondly, diva-e Conclusion has joined forces with Dutch business transformation and IT service provider Conclusion, which has primarily been active in the Benelux region to date. Conclusion DACH GmbH, founded in 2025, is a new entity for the German-speaking market: diva-e Conclusion is responsible for the digital experience services portfolio, while its sister company Conclusion Intelligence contributes its expertise in data and AI. Together, the two companies generate revenues of around €115 million. diva-e Conclusion has grown strongly in recent years, partly through several acquisitions as part of the private equity investor Emeram's investment from 2016 to 2024.



Lünendonk Portfolio 2025: Classification of leading DXS providers in Germany

In addition to the Lünendonk List, the Lünendonk Portfolio provides transparency regarding the positioning and market strength of leading DXS providers. It compares the service providers examined with their respective portfolio focuses, market shares and market perception. The classification of service providers based on the two axes "DXS market strength" and "DXS portfolio depth and breadth" is influenced by various factors. In addition to the information provided in writing by the service providers on their business development, the analysis also includes the evaluations of the participating customer companies on the service providers.

LÜNENDONK PORTFOLIO 2025: LEADING DXS PROVIDERS IN GERMANY

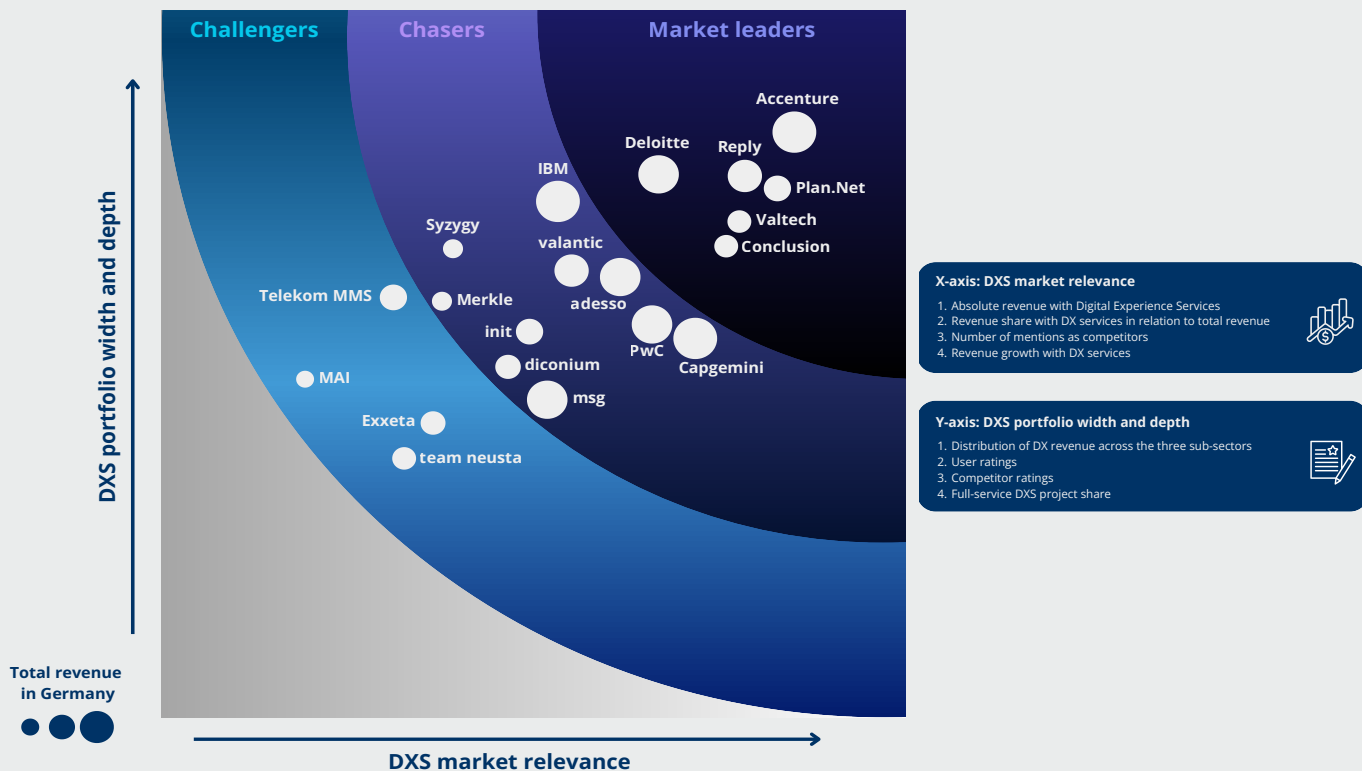


Fig. 14: Lünendonk Portfolio 2025

The Market for Digital Experience Services in Germany

Among other things, they 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 as providers of digital experience services.

When interpreting the rankings, it is important to note that all the service providers listed in the Lünendonk portfolio offer a wide range of digital experience services and are therefore all leading DXS service providers. They are therefore all fundamentally capable of providing end-to-end services relating to customer centricity, digital experience, digital marketing, commerce solutions or the development and implementation of digital platforms.

However, the DX service providers operating in Germany differ significantly in terms of their thematic depth and coverage of digital experience services, their industry focus and their ability to implement projects end-to-end. Some service providers cover the entire value chain with a wide range of services, while others are full-service providers in individual fields (e. g. digital marketing, e-commerce platforms) or industries (public sector, retail, automotive). Other service providers, in turn, offer a comprehensive DXS portfolio but do not yet have the necessary depth in their range of services compared to others, while some still have potential in terms of market strength.

THE MARKET LEADERS

As in the Lünendonk List, **Accenture** is also ranked as the market leader in the Lünendonk portfolio. The IT services group is by far the most frequently cited relevant competitor and has a broad and deep DXS portfolio, thanks in part to various acquisitions and its comprehensive consulting, data and technology expertise. In addition to the creative, design, commerce and DX technology services bundled under the Accenture Song brand, Accenture, as the world's largest service and consulting group with over 700,000 employees, offers a comprehensive portfolio to support customers even with complex transformations.

Deloitte is the second leading global consulting and digital services provider in the market leader segment. As one of the world's largest consulting, tax and audit firms, Deloitte entered the digital agency business early on and is one of the largest providers in this field internationally: according to AdAge's Agency Report, Deloitte Digital is the fifth largest agency in the world. The DXS service providers surveyed in the Survey also see Deloitte as one of the most important providers in Germany: Deloitte received the second-highest number of mentions after Accenture. The group employs over 460,000 people worldwide, around 14,000 of whom are based in Germany. Thanks to this international presence and interdisciplinary approach, Deloitte can also support large-scale transformation projects for clients, helping them to reinvent their digital experience and exploit new technological opportunities.



The Market for Digital Experience Services in Germany

Reply is also one of the long-standing market leaders in the DXS market. Like Accenture, Reply is listed in the [Lünendonk List of the 25 largest IT consulting and system integration companies in Germany](#). The Reply AI Film Festival and AI Music Contest are breaking new ground in the creation of GenAI-based content: This international competition calls for the creation of short films and music using AI and their submission to the contest. The best participants receive prize money. There were over 2,500 submissions for the AI films alone. Reply is thus offering a significant contribution to the future of media production – AI-generated advertising films and content.

In addition, Reply has launched Silicon Shoring, a new AI-supported software development model that rethinks and optimises the entire software development lifecycle. Various AI agents support every phase of software development in a multi-agent architecture – from requirements engineering, design, development and testing to deployment and maintenance – resulting in significant efficiency gains, improved software quality and a scalable model.

Plan.Net Group, part of Serviceplan, also has strong DXS market presence and a deep and broad portfolio. While DXS revenue among DXS specialists, that is, companies originating from the agency and experience environment, declined by an average of 2.5 per cent in 2024, Plan.Net achieved a revenue increase of around four per cent. Like several other DXS service providers, Plan.Net is intensively involved with AI agents and offers customers a blockchain-based agent-to-agent protocol (Masumi) and an open marketplace for AI agents (Sōkosumi).

In spring 2025, it was also announced that the agency model "The Marcom Engine", created for the client BMW in 2020, would be extended until the end of 2027. The Marcom Engine aims to integrate marketing, communication and production along the entire customer journey and place greater focus on data, automation and efficiency.

As part of the contract extension, the scope of responsibilities has also been expanded, meaning that The Marcom Engine is now also responsible for a large part of asset production as well as the adaptation and rollout of central campaigns.

Since 1st July 2025, the Plan.Net Group has been led by Christian Schmitz, who has also been appointed to the board of the Serviceplan Group. Schmitz will take on the new position in addition to his role as CEO of The Marcom Engine.



The Market for Digital Experience Services in Germany

Valtech also continues to assert itself as a market leader. While the core Valtech brand performed well in 2024, the automotive crisis hit the joint venture with Audi AG, Valtech Mobility, particularly hard. Since its foundation, Valtech has been a strongly implementation-oriented digital agency with a high level of technological expertise, a broad ecosystem covering all relevant DX technology manufacturers and a comprehensive DXS portfolio and is therefore considered one of the most important competitors. Valtech has a global presence with over 6,000 experts in more than 60 offices worldwide and thus also has significant shoring capacities. In 2024, Valtech acquired Kin + Carta, a digital transformation consultancy from the United Kingdom with around 2,000 employees.

Conclusion is also a market leader. The acquisition of diva-e by Conclusion creates a new entity for the German-speaking market: diva-e Conclusion is responsible for digital experience services, while Conclusion Intelligence contributes its expertise in data and AI. This opens up new opportunities for the portfolio and potential customers to continue growing in the market and increasingly act as a business transformation partner. diva-e Conclusion remains one of the leading providers in the field of digital commerce and experience platforms – with a focus on retail, financial services and B2B manufacturing. The aim is to consistently expand this position in the DACH market and also to grow in Conclusion's other domains: Data & AI, Enterprise Applications, Business Consulting and Cloud & Mission Critical.

THE PURSUERS

IBM is also one of the world's largest digital agencies with its IBM iX brand. IBM iX is active in various industries, but in Germany it focuses primarily on the public sector and the healthcare market. With the acquisitions of Aperto and ecx.io, IBM entered the German DXS market early on in 2016.

valantic has established itself among the contenders in recent years and has grown strongly both organically and inorganically: while total revenue in 2021 was still at 270 million euros, it will reach 550 million euros in 2024 – a significant portion of which, in the high double-digit percentage range, will be attributable to digital experience services. Around 1,000 experts at valantic are involved in digital experience. In February 2025, valantic announced a strategic partnership with digital experience software provider Optimizely, further expanding its partner ecosystem.

With total revenue of around 1.3 billion euros in Germany and – like valantic – a DX revenue share in the high double-digit percentage range, **adesso** is one of the most important competitors in the DX market.



The Market for Digital Experience Services in Germany

The Dortmund-based company has consistently expanded its DX portfolio in recent years and gained market share, with the result that adesso is now cited by some market players as a major competitor. adesso has significant portfolio elements, particularly in front-end software development, the integration of DX platforms, and in classic areas such as performance marketing and content creation. adesso is also a leading service provider in Germany in the important areas of data and AI.

Alongside Deloitte, **PwC** is another major player in the DX market as an international consulting and auditing group. According to the renowned AdAge ranking, PwC is one of the world's largest digital agencies, alongside Accenture, Deloitte and IBM. PwC has a broad portfolio in the creative sector as well as in the introduction of new technologies and data and AI and also has an established strategy consulting arm in Strategy&. PwC employs over 370,000 people worldwide, around 15,000 of whom are based in Germany. While Germany's revenue across all business areas amounted to 3.05 billion euros in 2024, the Lünendonk Survey only shows advisory revenue, which stands at 1.46 billion euros.

Capgemini generates an estimated 2.25 billion euros in revenue in Germany, according to Lünendonk, and is also a major player in the DX market. Under the Capgemini Invent brand, Europe's largest consulting and digital group bundles its portfolio of consulting, innovation, design and transformation services. The design and innovation consultancy frog, which was acquired in 2021, is also part of Capgemini Invent and strengthens the portfolio with customer experience services. The company's main focus is on the automotive industry and the public sector, but Capgemini is also active in various other industries in Germany. The company employs over 350,000 people worldwide and thus has comprehensive shoring structures in place to support even large transformation and implementation projects (e. g. Salesforce).

msg is a newcomer to the field of contenders. The German IT service provider has greatly expanded its DX business in recent years under msg digital, adding consulting and agency services to its original IT service, system integration and software development business. One focus is on banks and insurance companies, but msg also works for other industries such as manufacturing and public administration. Across the entire msg Group, total revenue is around 1.5 billion euros.



The Market for Digital Experience Services in Germany

The following companies all have a DXS revenue share of over 75 per cent and are therefore also listed in the Lünendonk sub-ranking of DXS specialists. As a subsidiary of the VW Group, **Diconium** has a strong focus on the automotive industry – for example, in the development of infotainment systems – and increased its revenue by 4 per cent to 188 million euros in 2024. In 2024, a second location was opened in the USA to strengthen the US business in the areas of software, data and AI.

In contrast, **init** focuses on the public sector and is a leader in administrative digitisation. init's customers include several federal ministries. Due to the change of government in Germany and uncertainty in the budget regarding which areas the federal government will invest in and to what extent, init looks back on a challenging year in 2024 and had to accept a decline in revenue. In the long term, however, init has developed very positively: in 2021, total revenue was still at 152 million euros, rising to 210 million euros in 2024.

Merkle is also among the contenders. Since 2021, the two original digital agencies Namics and Isobar Switzerland have been operating under the name Merkle. Merkle is part of the international agency Dentsu, focusing on customer experience management, data, technology and performance marketing. Merkle works for clients from a variety of sectors, with a focus on industry and the consumer goods market. Since 2024, Merkle Germany has been managed by Joel Flammann, who replaced Daniela Stofer.

Syzygy AG, part of WPP, is also part of an agency group. The Syzygy Group employs around 500 people, most of whom are based in Germany. Global turnover in 2024 was around 69 million euros, of which around 56 million euros was generated in Germany. Syzygy celebrated its 30th anniversary in 2025. The Syzygy Group includes: SYZYGY, the consulting and implementation partner for digital experiences; Syzygy Performance, which focuses on performance marketing; Syzygy Techsolutions, which focuses on enterprise IT solutions; different, which focuses on strategy consulting; and ArsThanea, which focuses on design and craft.

THE CHALLENGERS

The challengers are also leading DXS service providers, but have isolated weaknesses in terms of DXS market strength and/or DXS portfolio depth and breadth. **Telekom MMS**, a subsidiary of Deutsche Telekom, focuses on developing customer-centric software solutions and works primarily for external customers from various industries. While the company operated under the name T-Systems Multimedia Solutions until 2023, it has since been renamed Deutsche Telekom MMS GmbH and is no longer part of T-Systems, but directly subordinate to Deutsche Telekom AG. Data & AI, digital transformation, cloud, cyber security and digital work are also part of the portfolio.



The Market for Digital Experience Services in Germany

Exxeta also consolidated its position among the challengers and increased its total global revenue in 2024 by around 8 per cent to 135 million euros. Exxeta also performed well in the DX sector and has an industry focus on the automotive and banking sectors, although Exxeta works for customers in several industries. Exxeta is particularly active in the areas of digital consulting and technology services.

Team neusta is also one of the DXS specialists. Team neusta SE brings together many companies and brands that belong to the ecosystem. In recent years, team neusta SE has acquired several companies – including Goldmarie & Friends and open4business – while at the same time divesting itself of units such as neusta mobile solutions and neusta portal services. Revenue in 2024 is therefore developing negatively, both organically and inorganically.

New to the Lünendonk List and Portfolio is **MAI**. The MAI Group was formed in 2022 through the merger of seven independent digital agencies. Its portfolio covers customer research, strategy, consulting, user experience, digital marketing, loyalty, platforms and technology. MAI's more than 400 employees work for clients in a variety of industries. In June 2024, MAI acquired the UX agency eresult. Philipp Hannemann has been the new CEO of the MAI Group since July 2025, replacing Christian Tiedemann.



Lünendonk sub-ranking of service providers focusing on digital experience

Due to the ranking criterion of "total revenue in Germany", the Lünendonk List of the 25 leading providers of digital experience services consists of large, broadly based consultancies and IT service providers in the first half. Digital experience services are an important part of their portfolio, but not their core business. However, in order to transparently show which service providers focus on digital experience services, Lünendonk has again this year examined in a sub-ranking which service providers generate at least 75 per cent of their revenue with digital experience services.

12 service providers were included in the following sub-ranking, measured by their total revenue in Germany. As in the previous year, first place in this sub-ranking goes to the Plan.Net Group, followed by Telekom MMS. The following places are also occupied by init, diconium and Exxeta, as in 2024. While Valtech was still in 7th place in 2024, the DXS specialist moved up one place this year, swapping places with team neusta. Following the merger of diva-e with Conclusion, diva-e now appears as Conclusion in the ranking. diva-e Conclusion remains the specialist for DXS services within Conclusion.

Syzygy and Merkle each move up two places, as Digitas and Intive are no longer included due to their lack of participation. MAI and Port-neo, on the other hand, are new to the sub-ranking.



LÜNENDONK SUB-RANKING OF SERVICE PROVIDERS FOCUSING ON DIGITAL EXPERIENCE

The Market for Digital Experience Services in Germany

LÜNENDONK SUB-RANKING 2025: LEADING DXS SPECIALISTS IN GERMANY

Rank	Company	Revenue in 2024 in millions of euros in Germany
1	Plan.Net Germany GmbH & Co. KG, Munich 1)	248.0
2	Deutsche Telekom MMS GmbH, Dresden	232.0
3]init[AG für digitale Kommunikation, Berlin	197.3
4	Diconium GmbH, Stuttgart	188.0
5	Exxeta AG, Karlsruhe	128.0
6	Valtech GmbH, Düsseldorf	97.7
7	team neusta SE, Bremen 1) 2)	91.2
8	Conclusion DACH GmbH, Munich 3)	90.6
9	Syzygy AG, Bad Homburg	56.4
10	Merkle Germany GmbH, Frankfurt am Main 1)	44.5
11	MAI Marketing Automation Intelligence GmbH, Hamburg	31.0
12	Port-neo Group GmbH, Stuttgart	10.8



The Market for Digital Experience Services in Germany

Inclusion criterion:

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 include disposals.
- 3) Merger of Conclusion and diva-e in 2024.





Developments & trends on the DXS market

DX-Technology trends 2025 & 2027

Which topics and digital technologies currently play an important role in the development of digital experience, and which ones will become more important in the future? This question was posed to the user companies that were also surveyed by telephone for this survey.

CDP AND PIM REMAIN OF CENTRAL IMPORTANCE

Customer data platforms (CDPs) are already highly relevant today. They collect customer data from various sources, standardise it and make it available in real time for marketing, sales and service purposes to create holistic customer profiles and enable personalised experiences.

Product information management (PIM) systems also continue to be highly important: 72 per cent of user companies currently consider PIM to be important, and by 2027 this figure will rise to 90 per cent. As a central platform for product-related information such as technical specifications, prices, descriptions, images or videos, they bundle information from different sources and harmonise it to make it available for online shops, marketplaces, catalogues or POS systems.



DX TECHNOLOGIES IN THE CONTEXT OF THE INCREASING RELEVANCE OF PIM SYSTEMS, HYPERPERSONALISATION AND COMPOSABLE ARCHITECTURES

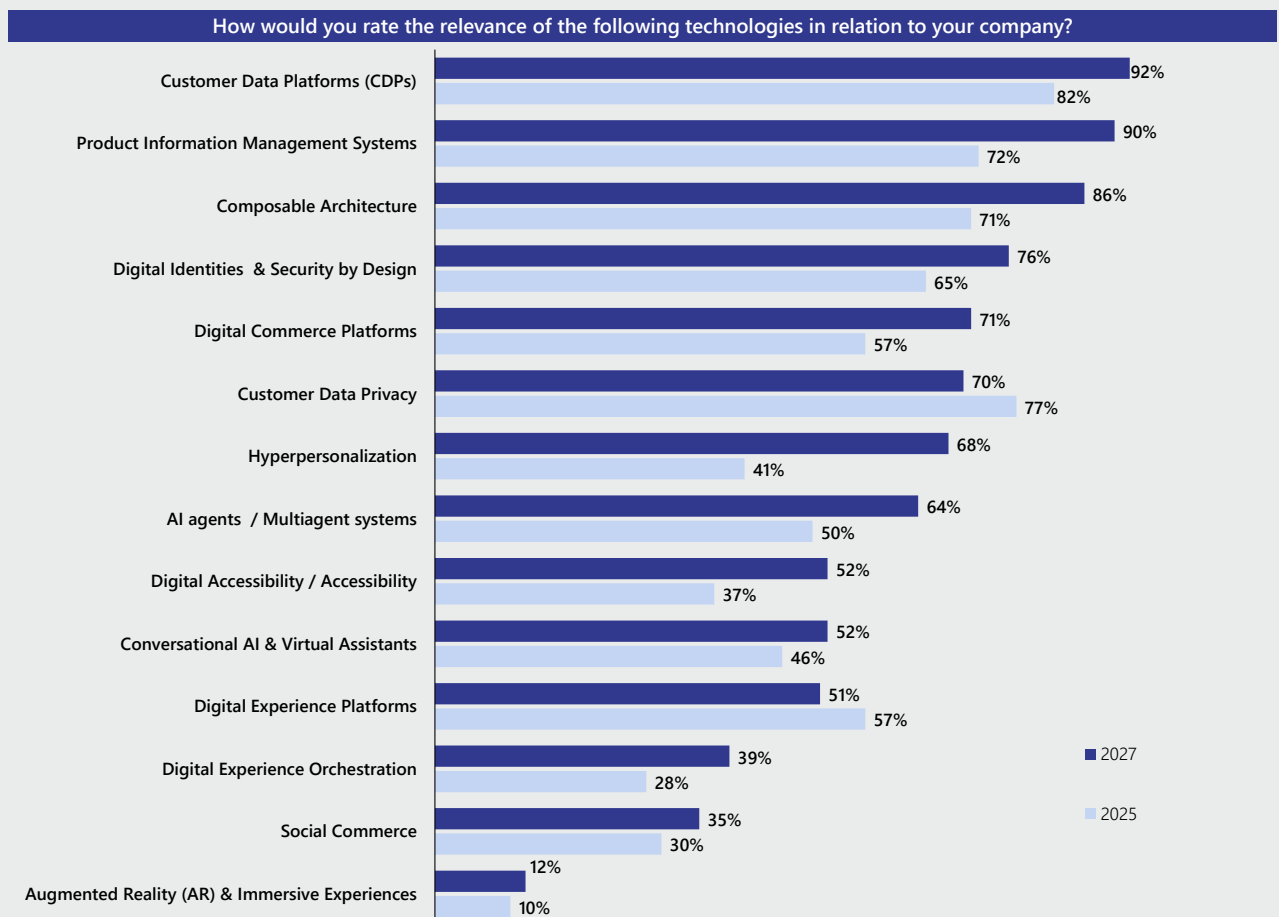


Fig. 15: How do you rate the relevance of the following technologies for your company in 2025 & 2027?; scale from 1 = "not relevant" to 4 = "very relevant"; relative frequency distribution; all companies; n = 160-165 (2025); n = 143-163 (2027)

GENAI 2.0: AGENTIC AI AND MULTI-AGENT SYSTEMS

AI agents and multi-agent systems are set to become significantly more relevant. These autonomous software programmes use artificial intelligence to perform certain tasks independently, such as providing personalised product recommendations, answering customer enquiries or guiding users through complex processes. Multi-agent systems, in turn, consist of several such agents that interact with each other, exchange information and cooperate to solve complex tasks better, more efficiently and often more dynamically. Customer experiences can thus be controlled in a highly individualised, context-related, adaptive and very efficient manner.



NEXT-LEVEL PERSONALISATION

Hyperpersonalisation is expected to gain the most relevance in percentage terms. One reason for this is that customers increasingly expect individual, context-related and real-time relevant experiences, while at the same time companies can meet these expectations more precisely using AI and data. At the same time, competitive pressure is leading to personalised customer experiences becoming a decisive differentiating factor to increase conversion rates and build long-term customer loyalty, for example.

SECURITY IN DIGITAL CUSTOMER EXPERIENCES

While 65 per cent of the companies surveyed today consider digital identities and security by design to be important, this figure is expected to rise to 76 per cent by 2027. In times of uncertainty – whether due to wars, geopolitical conflicts or increasing cyber-attacks by professional groups – security in the digital context is becoming increasingly important. Digital identities enable the unique identification of individuals, companies or devices, thereby protecting them. Security by design, on the other hand, focuses on ensuring that digital platforms, applications and customer touchpoints are developed in such a way that data protection, security and compliance are guaranteed from the outset.

COMPOSABLE ARCHITECTURES: RESPONDING MORE QUICKLY TO MARKET CHANGES

Composable architectures are now an important issue for 71 per cent of users. Applications are no longer developed as monolithic complete systems, but based on flexible, modular building blocks, with each building block having a clearly defined function and being able to be further developed, exchanged or scaled independently of the other building blocks. This allows systems to be adapted much more quickly to new requirements, channels or business models without having to replace the entire platform each time. Even though companies need to be familiar with the management of these different building blocks, as it involves a greater orchestration effort, composable architectures will become more important in the future: 86 per cent of user companies consider this IT architecture approach to be important in 2027.

MORE CLOUD SERVICES AND DIGITAL EXPERIENCE PLATFORMS ARE LEADING TO THE INCREASING RELEVANCE OF SERVICE ORCHESTRATION

Today, companies face the challenge that their customer data, communication channels and technological systems often exist in silos. Marketing, sales, service and commerce often use different tools – such as CRM systems, marketing automation platforms, e-commerce systems or social media management tools. This fragmentation makes it difficult to create a consistent, personalised customer experience across all touchpoints.



Digital experience orchestration addresses this issue by seamlessly linking data, systems and channels to ensure the delivery of personalised and consistent customer experiences across all touchpoints for a seamless customer journey. With the increased use of cloud services, through which more and more marketing technologies are being purchased as a service, orchestration is also gaining in importance, with 39 per cent of companies considering digital experience orchestration to be important in 2027, compared to only 28 per cent today.

SOCIAL COMMERCE: NICHE MARKET WITH GROWING IMPORTANCE

Social commerce remains a niche topic, despite its rapidly growing relevance. This involves selling products and services via social networks, where users are inspired within a social platform (Instagram, TikTok, etc.), receive recommendations and can make a purchase without media discontinuity. This merges social interaction, content and e-commerce – for example, through shoppable posts, livestream shopping or influencer recommendations. TikTok users, for example, can discover, rate and purchase products directly from videos, livestreams or the in-app shop without leaving the app. The still low relevance may be due, among other things, to the fact that companies still lack experience and social commerce is only being used on the first platforms – such as Instagram, TikTok or Facebook – but has not yet reached the masses. The embedding of commerce in these platforms creates new opportunities on the one hand but also increases dependence on the platforms on the other. The companies surveyed with a B2C focus are increasingly engaging with social commerce.



GenAI 2.0: Agentic AI and multi-agent systems as efficiency and innovation boosters

AI is here to stay – this development should be clear to virtually all companies. Generative AI is one of the key technologies of the future that will permanently change the way companies operate – and has already done so.

Although the [Lünendonk Survey "AI Transformation"](#) shows that 56 per cent of companies are at the beginning of their GenAI journey and are still identifying use cases, 39 per cent are already in the testing phase and have implemented initial PoCs (proofs of concept). Five per cent are advanced and have GenAI applications in productive operation. However, there are considerable efforts to roll out GenAI solutions more widely in marketing and sales and along the customer journey, as the following results show.

AI MATURITY: CLASSICAL AI IS ESTABLISHED, GENERATIVE AI IS STILL IN ITS INFANCY

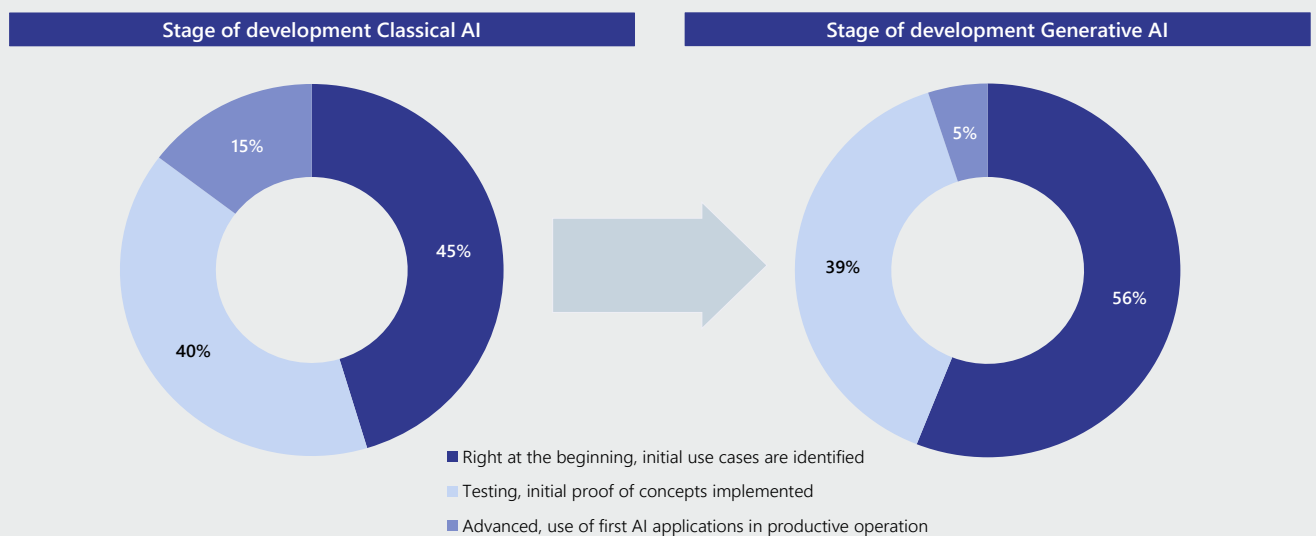


Fig. 16: What stage of development is your company at in the field of generative AI?; relative frequency distribution; all companies; n = 150; source: Lünendonk® Survey 2025: AI Transformation – Von der Experimentierphase zur produktiven Skalierung



The Market for Digital Experience Services in Germany

PREPARATION: CLEAN DATA FOR GOOD RESULTS

Artificial intelligence, and generative AI in particular, opens up a wide range of opportunities in marketing, sales and the design of digital experiences: it enables the evaluation of large amounts of data, the creation of digital content, supports the personalised delivery of content and, through creative solutions, creates differentiation from competitive offerings. However, high data quality and structured data are crucial prerequisites for the effective use of (generative) AI – but also for professional experience and branding measures independently of this. Only when data from different sources is consistent, up-to-date and cleanly processed can efficiency gains be achieved, a customer journey be orchestrated and potential in marketing, sales and digital experience be fully exploited.

77 per cent of the CxOs surveyed therefore assume that high-quality data will create efficiencies in internal processes by accelerating workflows, reducing error rates and using resources more efficiently. 64 per cent also expect better performance from their digital channels. An improved database enables more targeted control of these channels – for example, through more tailored content, personalised offers or optimised user guidance. Almost as many companies (62 %) expect more accurate AI-supported forecasts and a higher degree of personalisation, as comprehensive, high-quality data reveals behaviour patterns that enable precise predictions.

HIGH DATA QUALITY AND BETTER DATA MANAGEMENT PRIMARILY INCREASE PROCESS EFFICIENCY, PERFORMANCE, AND AI QUALITY

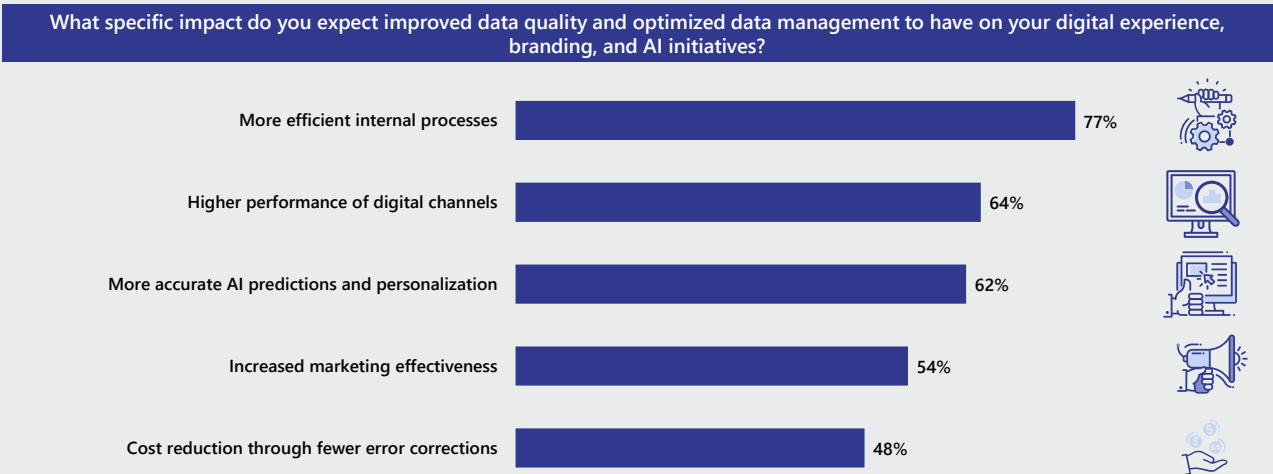


Fig. 17: What specific impact do you expect improved data quality and optimized data management to have on your digital experience, branding, and AI initiatives?; scale from 1 = "not at all" to 4 = "very high"; responses shown refer to "high" and "very high"; relative frequency distribution; all companies; n = 165

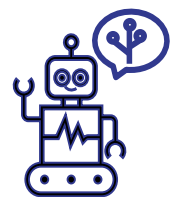
The Market for Digital Experience Services in Germany

AI AGENTS: THE NEXT EVOLUTIONARY STAGE OF GENERATIVE AI

While generative AI has developed massively since the introduction of ChatGPT in 2022 and is increasingly being introduced in companies and organisations, AI agents have only gained importance in recent months. These AI-based systems are capable of planning and executing tasks independently and learning from them. Unlike traditional AI applications, which are usually only used for clearly defined tasks, AI agents combine various skills: they can process information from different sources, make decisions, execute actions and iteratively adapt their strategies, making them significantly more proactive and enabling them to handle more complex tasks.

Due to this advancement over traditional AI, they are attracting considerable interest from companies. Just under a third (31 %) of survey participants say they have already implemented AI agents in their companies. Large companies with revenues of more than five billion euros have already deployed their first AI agents.

Another third (35 %) are planning to introduce AI agents, while the remaining third (34 %) are taking a cautious approach and AI agents are not yet an issue for these companies. The comparison with the DXS service providers surveyed is also interesting. 95 per cent of the providers surveyed state that they already offer customers solutions or services based on agent-based AI.



STATUS OF AGENT-BASED AI IMPLEMENTATION AMONG USERS AND PROVIDERS

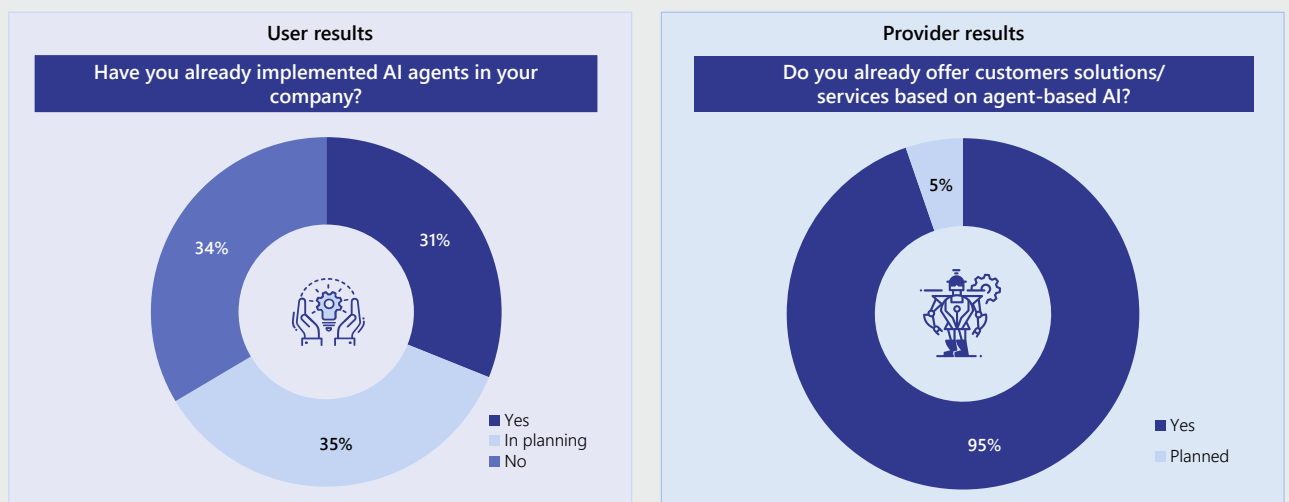


Fig. 18: Have you already implemented AI agents in your company?; relative frequency distribution; all companies; n = 164
Do you already offer customers solutions/services based on agentic AI?; relative frequency distribution; all companies; n = 19

The Market for Digital Experience Services in Germany

COMPANIES EXPECT INNOVATION BOOSTS FROM AI AGENTS

The reasons for using AI agents vary among the user companies surveyed. Proactive customer engagement and automated responses to service requests are the top priorities for 67 per cent of respondents. Companies see AI agents primarily as an opportunity to increase customer loyalty and scale service processes. This is linked to the expectation of being able to serve customers faster, more consistently and more individually. 66 per cent of companies also expect this to lead to efficiency gains in service and sales.

63 per cent also expect AI agents to develop and deliver consistent content throughout the entire customer journey and for the agents to understand customers accordingly and accompany them throughout the entire customer lifecycle. Creative content should be able to be developed more quickly, which will also change and continue to change customer expectations of agencies and the business model of traditional agencies.

COMPANIES EXPECT AI AGENTS TO DELIVER A WIDE RANGE OF BENEFITS, INCLUDING IMPROVED CUSTOMER ENGAGEMENT, SERVICE AUTOMATION, AND INCREASED EFFICIENCY

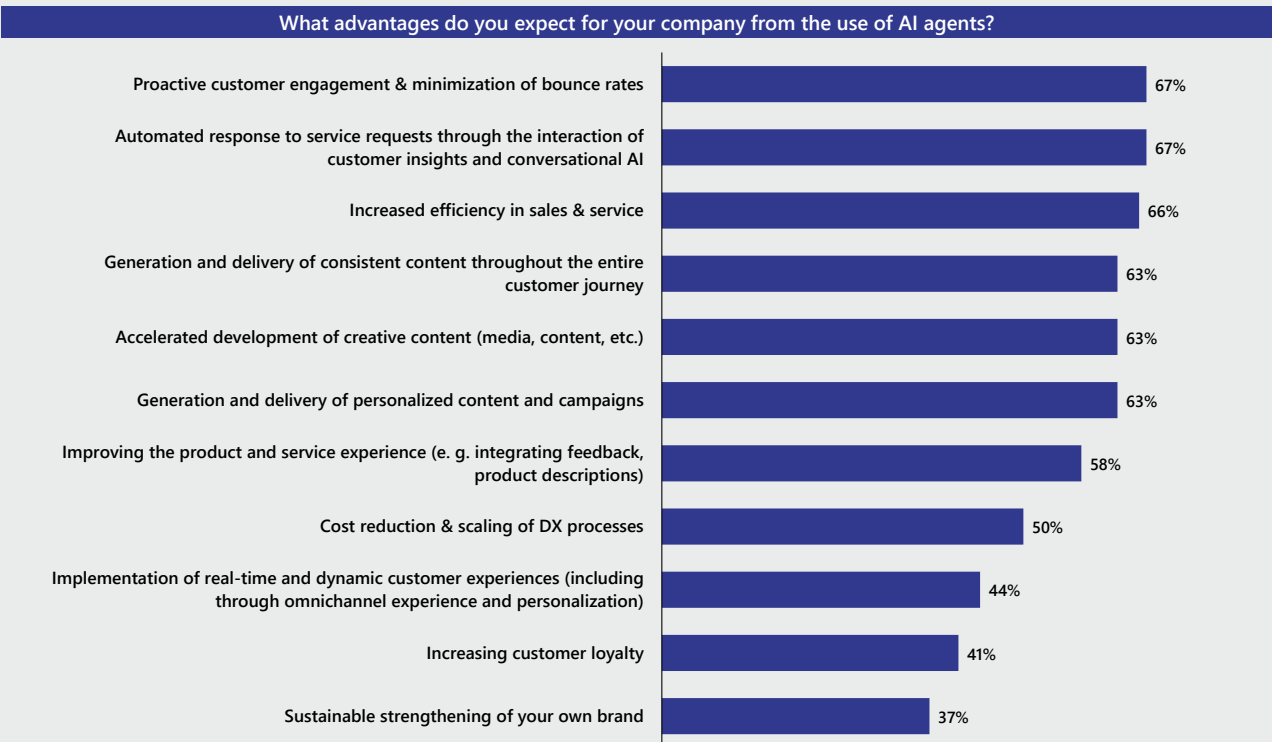


Fig. 19: What advantages do you expect for your company from the use of AI agents?; scale from 1 = "not at all" to 4 = "very strong"; responses shown refer to "strong" and "very strong"; relative frequency distribution; all companies; n = 164



The Market for Digital Experience Services in Germany

Although only around four in ten companies expect an increase in customer loyalty and a sustainable strengthening of their brand, this nevertheless indicates relevant potential. The results show that AI agents are not only used to improve operational processes but can also contribute to overarching corporate goals.

AREAS WITH GREAT POTENTIAL FOR AI AGENTS

Three out of four of the marketing, strategy and sales managers surveyed (75 %) see great potential in conversational AI and chatbots. They recognise automated, dialogue-oriented customer interaction as an immediate and practical field of application that promises both efficiency gains in service and improvements in customer experience.

Slightly fewer survey participants see potential in customer data analysis and segmentation (69 %) and automated content creation (65 %) for targeting audiences more precisely and efficiently generating the volumes of content required for digital channels. Companies hope that greater personalisation will lead to more efficient use of resources, but also to better satisfaction of customer needs, which will reduce bounce rates and increase customer satisfaction. 37 per cent of companies also expect an improvement in conversion rates through more tailored content.

IT AND BUSINESS REPRESENTATIVES SEE GREAT POTENTIAL OF AI AGENTS

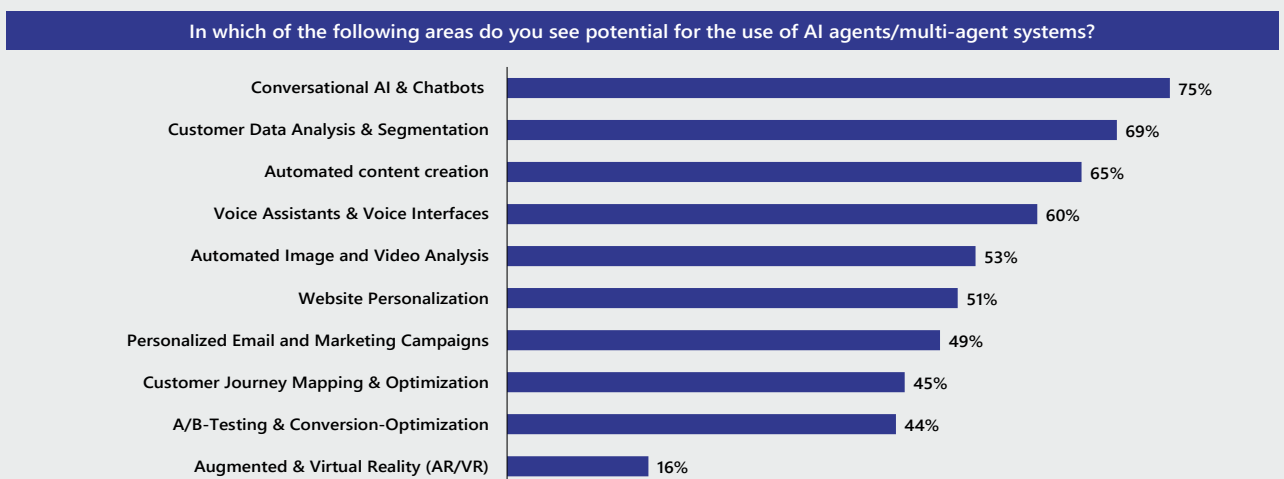


Fig. 20: In which of the following areas do you see potential for the use of AI agents/multi-agent systems?; scale from 1 = "not at all" to 4 = "very strong"; responses shown refer to "strong" and "very strong"; relative frequency distribution; all companies; n = 102-108



EXPECTED EFFECTS OF THE USE OF AI AGENTS

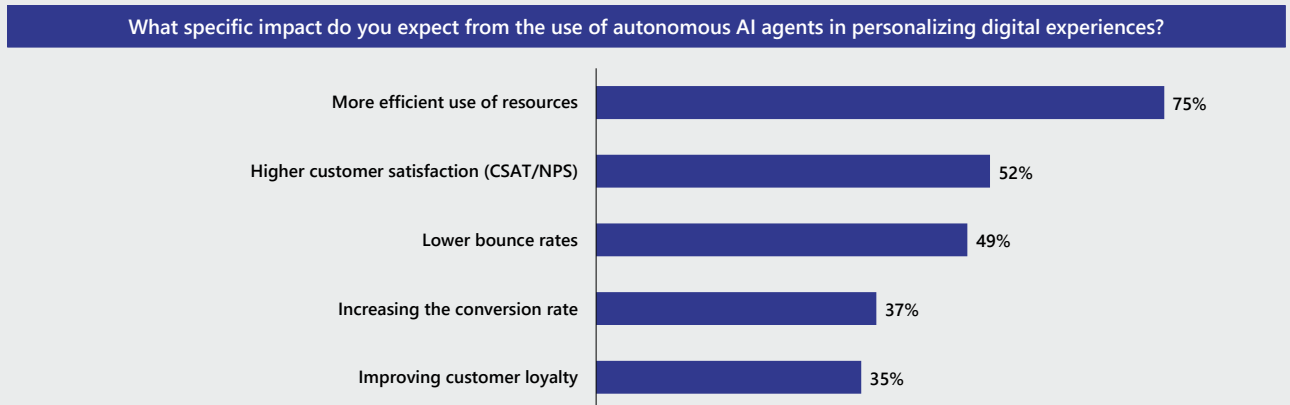


Fig. 21: What specific impact do you expect from the use of autonomous AI agents in personalizing digital experiences?; scale from 1 = "not at all" to 4 = "very high"; responses shown refer to "high" and "very high"; relative frequency distribution; all companies; n = 162

With 60 per cent approval, voice assistants and voice interfaces are also among the key areas of application for AI agents. In addition to convenient use for customers, companies expect AI-supported voice systems to enable efficient scaling of service processes and round-the-clock availability without additional personnel costs.

DEVELOPMENT OF AI SOLUTIONS: EXTERNAL SERVICE PROVIDERS ARE INNOVATORS

While the opportunities and possibilities of AI are often known at the use case level, the question arises as to how appropriate AI solutions can be developed and implemented in the existing IT landscape and how data competence can be built up. 81 per cent of survey participants work with external service providers for this purpose.

Three out of ten companies also state that they use integrated AI tools that are part of their purchased CX platforms or other customer software solutions, meaning that AI innovations are not purchased separately. Less frequently (19 %), cloud-based AI services are integrated into existing systems via interfaces (APIs), as this is currently still very costly or the services cannot be cleanly integrated into the existing system landscape. However, with increasing digital maturity, Lünendonk believes that API integration will increase significantly in the coming years.



The Market for Digital Experience Services in Germany

One thing is clear, however: in-house development of AI solutions in the CX area is the least frequently used option, with only 16 per cent of respondents relying on it. The reasons for this are that there are too few AI developers available on the market, there is a lack of sufficient data expertise, and in-house developed AI solutions can be very cost-intensive in development and, above all, in operation. The results thus show that external service providers are important drivers of innovation when it comes to advancing companies in the field of AI.

INTEGRATION OF AI SOLUTIONS IN THE CX AREA MOSTLY CARRIED OUT BY EXTERNAL SERVICE PROVIDERS

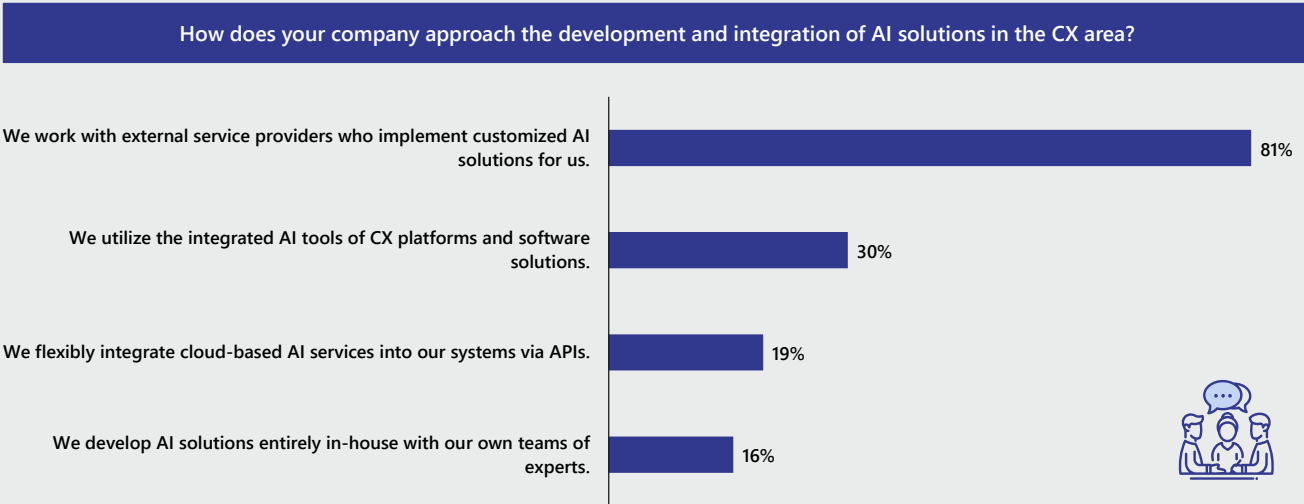


Fig. 22: How does your company approach the development and integration of AI solutions in the CX area?; multiple answers; relative frequency distribution; all companies; n = 159

DXS PROVIDERS SEE GREAT POTENTIAL IN AI

The DXS service providers surveyed are therefore already investing significantly in AI – and want to invest even more heavily in it: while an average of 2.5 per cent of revenue was invested in AI in 2024, this figure is set to rise to 3.5 per cent in 2025 – a percentage increase of 40 per cent.

Service providers also expect that there will be significantly more potential for using AI in customer projects in the future: 72 per cent already see potential in personalisation, targeting and segmentation, but by 2027, all service providers expect AI to have a major impact on these areas.



The Market for Digital Experience Services in Germany

AI is also expected to create new potential in content creation, UX optimisation and campaign management, thus continuing to develop technologically, gaining in performance and being integrated into almost all data-driven marketing and customer processes. At the same time, these results show that AI is significantly changing the business model of agencies, which must adapt to technological progress.

DXS SERVICE PROVIDERS SEE POTENTIAL FOR AI IN CUSTOMER PROJECTS IN ALMOST ALL AREAS OF APPLICATION – INVESTMENTS ARE INCREASING

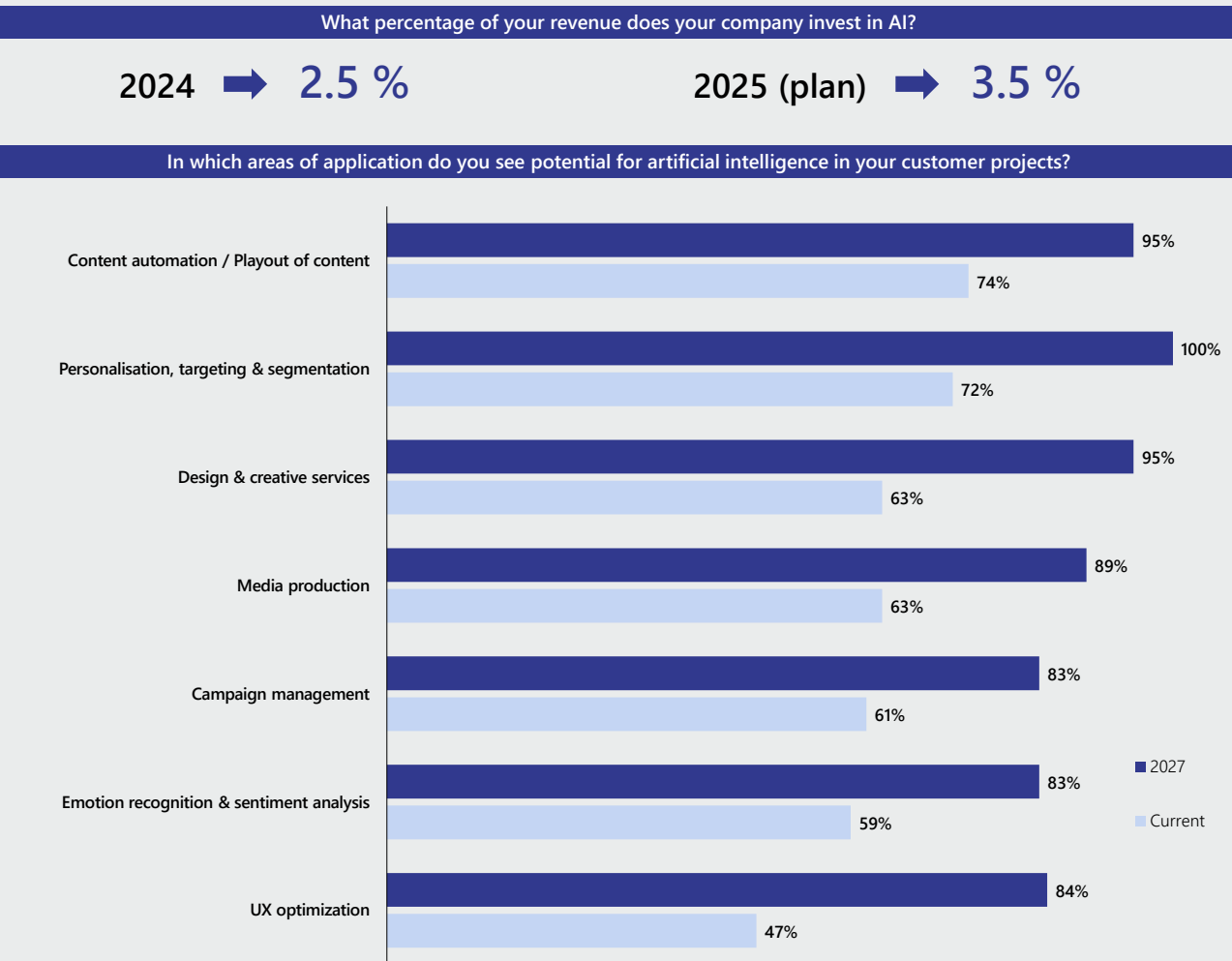


Fig. 23: What percentage of your revenue does your company invest in AI?; mean values; all companies; n = 11
In which areas of application do you see potential for artificial intelligence in your customer projects?; scale from 1 = "not at all" to 4 = "very strong"; responses shown refer to "strong" and "very strong"; relative frequency distribution; all companies; n = 19



Risks and obstacles in the use of GenAI

AI RISKS: CUSTOMER DATA, MISUSE OF SYSTEMS AND PROVIDERS, AND LEGAL VIOLATIONS

However, there are various risks associated with the use of AI. 68 per cent see the processing of sensitive customer data as a realistic risk. Careless or unintentional use of customer data in AI systems can lead to violations of regulations such as the GDPR and permanently damage customer trust.

58 per cent also see a risk in AI systems using data beyond their actual intended purpose – and thus misusing it – which leads to general scepticism about AI systems. This concern is closely related to transparency and controllability, as many operators of AI models do not disclose, or do not fully disclose, how and for what purpose the systems process the data in detail. As a result, there is growing pressure on AI users to establish clear rules for handling data and to introduce mechanisms that ensure purpose-specific use and strengthen trust in AI applications.

AI USAGE: USER COMPANIES SEE THE GREATEST AI RISKS IN DATA PROTECTION BREACHES AND MISUSE OF SENSITIVE DATA

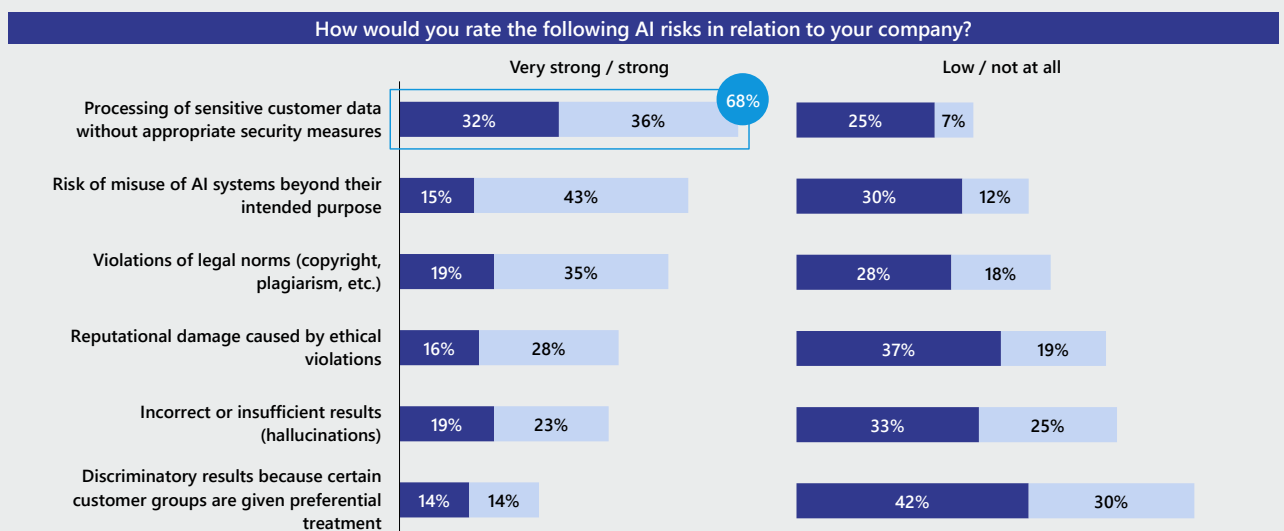


Fig. 24: How would you rate the following AI risks in relation to your company?; scale from 1 = "not at all" to 4 = "very strongly"; relative frequency distribution; all companies; n = 164-166

While in the past, hallucinations – that is, AI-generated information that appears plausible but is in fact false or fabricated – were considered one of the biggest problems with AI systems, today only 42 per cent still see hallucinations as a risk. This indicates that companies have greater confidence in the technological development and maturity of AI systems.

MEASURES FOR COMPLIANT AI USE

These risks also give rise to regulatory challenges. Companies must address issues such as data protection, transparency and the traceability of AI decisions. In addition, new legal frameworks such as the EU AI Act impose additional requirements for the responsible and legally compliant use of AI technologies. Various measures are being taken to meet these requirements. 78 per cent of survey participants are focusing on improving data management and data quality – a key prerequisite for the responsible use of AI. Only when data is complete, consistent and correctly processed can distortions and incorrect decisions in AI models be avoided.

In addition, structured data management helps companies to reliably meet regulatory requirements such as transparency and documentation obligations. High data quality therefore not only supports the functionality and accuracy of AI systems but also creates the necessary basis of trust with customers, partners and supervisory authorities. In addition, 75 per cent of survey participants have also established internal control mechanisms to ensure compliance with regulatory requirements, regularly review systems and identify potential risks at an early stage. This makes it clear that data quality and internal controls are not only technological foundations, but also play a decisive role in compliance, risk management and the sustainable acceptance of AI solutions.

At the same time, however, employees must also be enabled to use AI applications correctly – or rather, they must be taught what constitutes correct use. 63 per cent of companies therefore rely on training and awareness-raising measures, which are also intended to reduce the risk of potential sanctions in the event of misuse. Six out of ten companies also state that they bundle responsibility for AI governance, risk and compliance. This organisational responsibility indicates an increasing degree of maturity, meaning that AI and its risks are being handled professionally. Different strategies are being pursued depending on whether GenAI products from the EU or from non-European providers are predominantly used. The debate about greater digital sovereignty has led to non-European technologies being viewed with increasing scepticism, even though many digital innovations originate from abroad, particularly the US. This is leading to growing demand for trustworthy European alternatives that better comply with the GDPR and the EU AI Act. Whether this aspiration can be pursued in the medium and long term depends on the further development of the European AI provider landscape.



AI COMPLIANCE: COMPANIES ENSURE AI REGULATORY COMPLIANCE PRIMARILY THROUGH DATA MANAGEMENT AND INTERNAL CONTROLS

What measures does your company take to ensure that regulatory requirements are applied when implementing AI strategies?

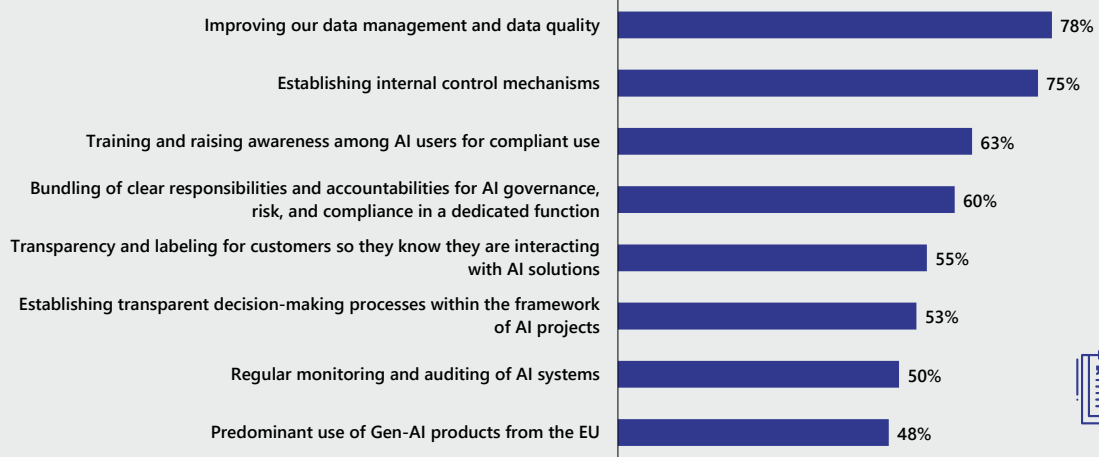


Fig. 25: What measures does your company take to ensure that regulatory requirements are applied when implementing AI strategies?; multiple answers; relative frequency distribution; all companies; n = 161

From SEO to GEO: How generative AI is changing online marketing

Google is currently changing the rules established in recent years in digital marketing. The introduction of Google SGE (Search Generative Experience) has serious consequences for visibility, reach and content strategies. Specifically, this involves the planned integration of generative AI into Google search results – Generative Engine Optimisation.

Generative Engine Optimisation (GEO) describes the adaptation of content to AI-supported search and response systems, which are increasingly replacing traditional SEO mechanisms. With the shift towards contextualised, generated responses, the visibility of brands, products and services on the internet is changing fundamentally. For CMOs, this development means that to remain relevant and differentiated in an AI-driven customer journey, they must:

- The click-through rate on traditional search results is declining.
- The relevance of content is no longer defined by keywords, but by semantic fit and trustworthiness.
- Content quality and structure must be adapted to AI-compatible readability.

As various studies show, Google remains by far the dominant search engine, even though information and products are increasingly being searched for using GenAI tools such as ChatGPT. For many years now, Google has had new potential competitors that could really threaten its monopoly. The software company has already responded to this and developed further: with the "AI Overviews" function, the company has been integrating generative models directly into the results display in Germany since March 2025, providing users with summaries instead of purely linked hit lists, which should enable answers to be found more quickly. This is Google's response to changing search habits, with users increasingly expecting direct answers and no longer wanting to navigate through numerous sources themselves. The feature is based on Google's own Large Language Model (LLM) "Gemini" and is being rolled out gradually in more and more markets, with the focus on added value, speed and relevance.

For marketers, this means that visibility is shifting – it is no longer just the placement in the Top rankings that matters, but whether and how content appears in the generated overviews. Google is thus marking a strategic paradigm shift: from the search engine as a "gateway to the web" to an answer and context engine that offers users guidance early in the research process.



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The game changer is that content is no longer developed exclusively for humans – but for machines that think for humans. This requires a rethink – in strategy, content design and performance measurement.

THE SHORT-TERM IMPACT OF GEO ON GOOGLE IS STILL INSIGNIFICANT, BUT IN THE MEDIUM TERM, IT COULD HAVE A MAJOR IMPACT ON THE VISIBILITY OF BRANDS AND PRODUCTS

Although features such as "AI Overviews" are still new to Google and have so far had little impact on how information is processed and presented to users, 24 per cent of the companies surveyed already state that this development is having a significant impact on their business.

INTEGRATION OF AI FUNCTIONS IN GOOGLE: COMPANIES HAVE SO FAR SEEN LITTLE IMPACT ON THEIR OWN MARKETING ACTIVITIES – BUT THE MEDIUM-TERM EFFECTS COULD BE GREATER!

Google, by far the largest search engine, is increasingly integrating AI functions. This will not only change the way users search and how search results are displayed, but also how marketers reach their target groups as AI agents become increasingly powerful.



24 per cent feel that this has a significant impact on their company

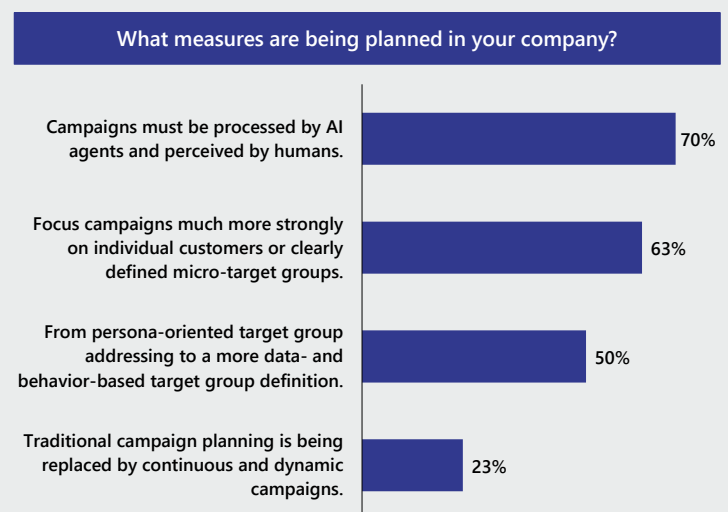


Fig. 26: How strongly does this development affect your company?; scale from 1 = "not at all" to 4 = "very strongly"; responses shown refer to "rather strongly" and "very strongly"; relative frequency distribution; all companies; n = 165
What measures is your company planning to take in response to this?; multiple answers; relative frequency distribution; all companies; n = 40



MEASURES AND INVESTMENTS TO STRENGTHEN GEO ORIENTATION

Those companies that already feel affected by the changes in search and discovery behaviour on Google are already taking initial steps to remain relevant. 70 per cent of them therefore see that campaigns must be processed by AI agents but then perceived by humans. Marketing must therefore increasingly be thought of in two ways: on the one hand, machine-readable for AI agents, and on the other hand, emotional and relevant for the customer.

63 per cent of respondents plan to focus their campaigns much more strongly on individual customers or clearly defined micro-target groups. This reflects the trend towards a personalised, highly granular approach to customers. Half of the companies plan to shift from classic personas to data- and behaviour-based target group classes. This shifts the focus from hypothetical assumptions to empirically based models with concrete measurability.

These planned measures mean that companies are investing heavily in certain areas to keep up with developments and gain a competitive advantage as first movers. 73 per cent are pushing ahead with AI-supported marketing automation. GEO requires companies to structure and prepare content in such a way that AI-supported response systems can recognise and understand it and integrate it into their generated output. Content and marketing processes must therefore be aligned with this – and be more automated so that AI models can process data efficiently and thus be "GEO-friendly".

Seven out of ten companies are pushing ahead with the establishment or expansion of a customer data platform, as CDPs provide consolidated and structured customer data that generative models need to correctly capture brand content and integrate it into their responses. 57 per cent also want to strengthen internal data competencies to focus more on GEO.

Just under one in four companies (24 %) want to invest in AI-supported automation of end-to-end process chains – a comparatively small proportion, which shows that many companies are initially focusing on sub-areas such as campaign management or content creation before automating the entire customer journey. This development is relevant in the context of GEO, as only end-to-end process chains ensure that data-based content is consistently orchestrated across all touchpoints and reliably considered by generative engines.



DXS PROVIDERS OBSERVE VARYING LEVELS OF INVESTMENT AMONG CUSTOMERS TOWARDS GREATER AI FOCUS

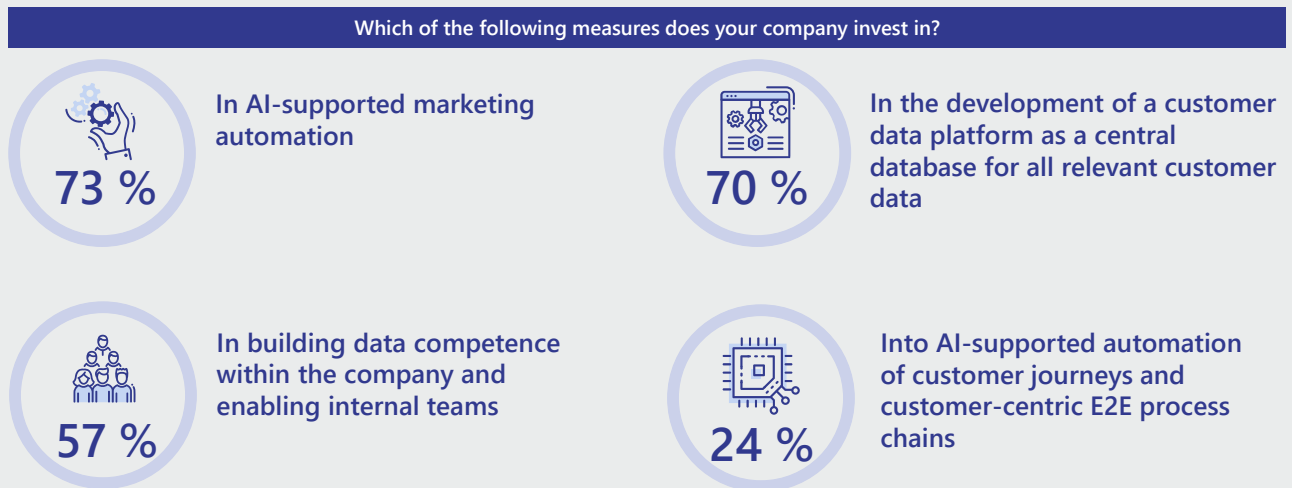


Fig. 27: Which of the following statements about the development of demand for DX services do you observe among your customers?; scale from 1 = "not at all" to 4 = "very strong"; responses shown refer to "strong" and "very strong"; all companies; n = 20



Investment topics in the DX area

DX SPENDING SET TO RISE AGAIN MORE STRONGLY

Due to the tense economic situation and correspondingly tight digital budgets, investments in digital experience have been lower in the last two years than in previous years. Especially during the coronavirus crisis, enormous investments were made in the development of digital marketing and digital commerce, which already led to a slowdown in the pace of investment in 2024.

However, there is some optimism returning for the years 2026 and 2027. Eighty per cent of the marketing, sales and DX managers surveyed said they wanted to increase their spending on digital experience again in the next three years. This illustrates that most of the companies surveyed recognise the need to return to a growth phase by investing in digital experience and digital business models. There are no significant differences between B2C and B2B companies or individual industries.

COMPANIES PLAN TO INCREASE SPENDING ON DIGITAL EXPERIENCE OVER THE NEXT THREE YEARS

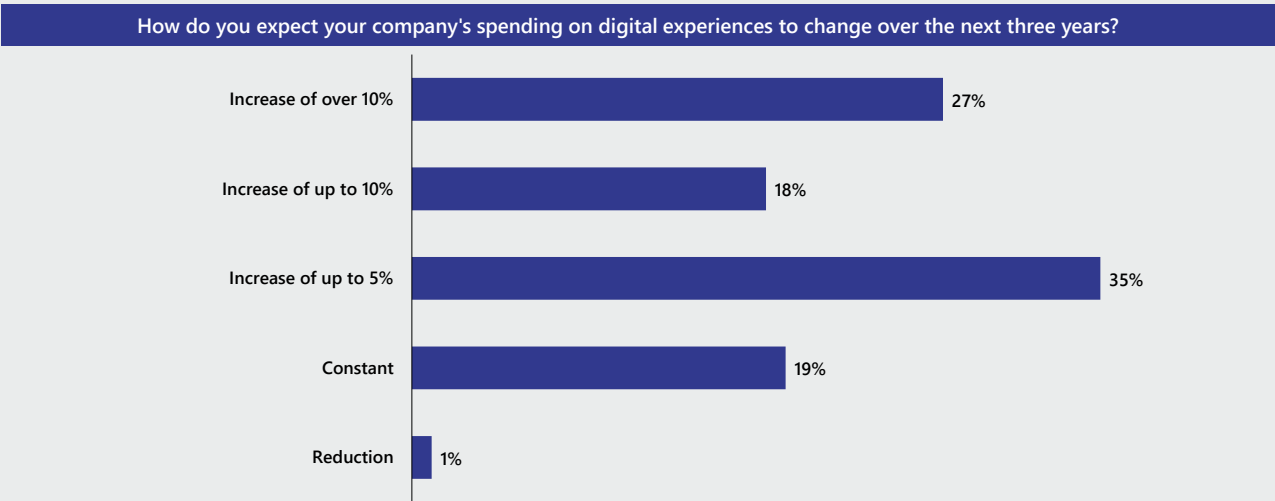


Fig. 28: How do you expect your company's spending on digital experiences to change over the next three years?; relative frequency distribution; all companies; n = 160



The Market for Digital Experience Services in Germany

However, as inflation is not factored into the figures, the proportion of companies that will increase their DX investments by more than five per cent is particularly interesting: 45 per cent expect such a strong increase.

INVESTMENT PRIORITIES FOR 2026/2027

But where exactly will the planned investments be directed? 85 per cent of survey participants – more frequently the B2C companies surveyed – state that it will flow into media production, that is the planning, creation and preparation of media content such as text, images, audio or video for marketing, communication or sales. Companies are therefore continuing to invest in this classic advertising topic, although budgets for this are rarely increasing and tend to remain constant. At the same time, the impact of AI is particularly high here, and media content can be produced much more cheaply and in less time thanks to AI. This also applies to the topics of "content & campaigns" (64 %) and "advertising & performance" (62 %).

72 per cent of companies will invest in managed services and the hosting of customer-centric IT solutions over the next two years. External service providers will benefit from this, as they will not only develop digital solutions, but also operate and optimise them and take on more responsibility for their further development. In addition, DX platforms place high demands on cloud compliance, performance, orchestration and cyber security, which is why IT operational services are becoming increasingly important.

This growing demand – particularly for managed services – is also reflected in other [Lünendonk Surveys](#). B2C companies generally use more DX technologies than B2B companies, and the B2C companies surveyed are also the ones investing the most in this area.

Significant investment is also being made in other technical services such as the integration of DX platforms into central enterprise systems such as ERP or SCM: 60 per cent of respondents plan to spend money on this. This allows customer data to be better linked with company data to integrate inventory, delivery times or invoice data into the customer journey and optimise the customer experience. Almost as many companies (61 %) are investing in data and AI to create personalised offers or increase the level of automation in customer processes. B2B companies are investing in both areas to roughly the same extent as companies with a B2C focus.

72 %
of companies plan
to invest in managed
services and hosting over
the next two years.

INVESTMENT TOPICS IN THE DX AREA

The Market for Digital Experience Services in Germany

DX BUDGET: INVESTMENTS PLANNED, PARTICULARLY FOR MEDIA PRODUCTIONS AND IMPROVING THE CUSTOMER EXPERIENCE

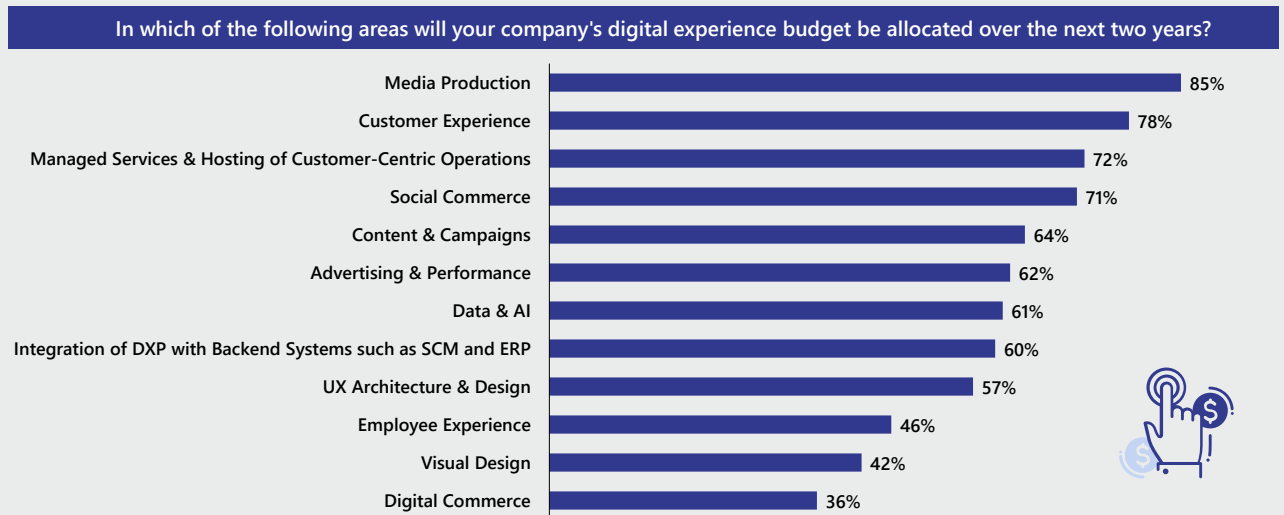


Fig. 29: In which of the following areas will your company's digital experience budget be spent over the next two years?; scale from 1 = "no investment" to 4 = "very strong investment"; relative frequency distribution; all companies; n = 158-165

B2B VS B2C COMPARISON: B2C COMPANIES INVEST MORE HEAVILY IN MANY AREAS THAN B2B COMPANIES

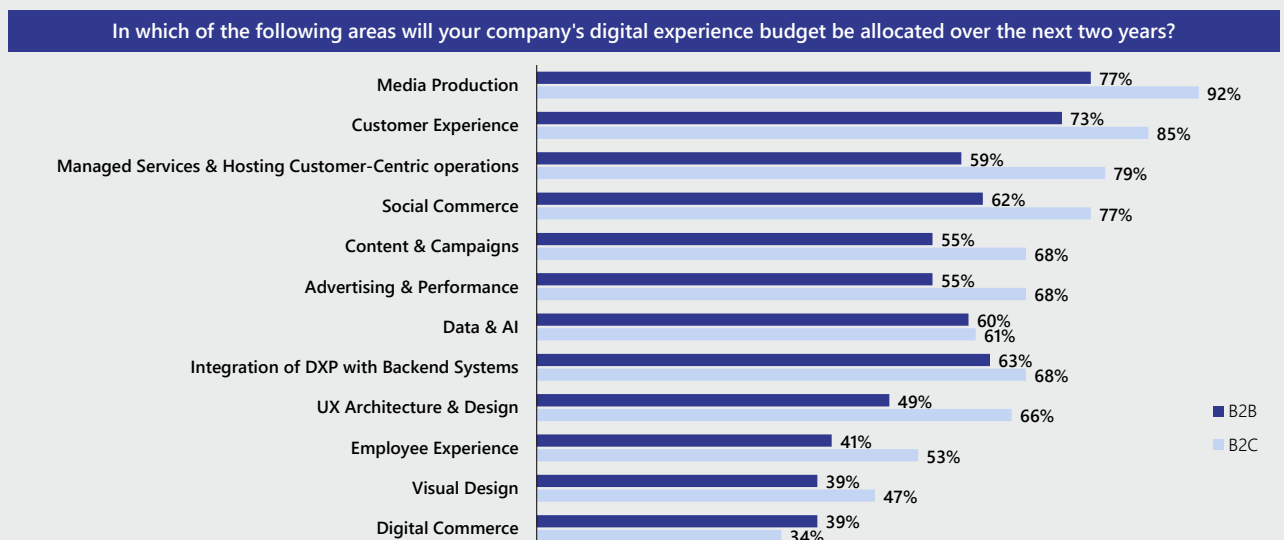


Fig. 30: In which of the following areas will your company's digital experience budget be allocated over the next two years?; scale from 1 = "no investment" to 4 = "very strong investment"; relative frequency distribution; all companies; n = 158-165

Revenue development and forecasts for DXS providers

The German economy entered recession for the second consecutive year in 2024, and current indicators suggest that 2025 will follow a similar pattern. Gross domestic product (GDP) fell by 0.2 per cent compared with the previous year, following a decline of 0.3 per cent in 2023. The reasons for this are the politically unstable situation prevailing in many countries and the geopolitical tensions that are leading to high energy costs, which is placing a heavy burden on Germany as an export nation. Similarly, consumers are spending less money as a result of inflation in recent years and rising energy prices, which is affecting various industries and influencing companies' willingness to invest.

LOWER WILLINGNESS TO INVEST BECAUSE OF THE ECONOMIC CRISIS: DXS SERVICE MARKET STAGNATES

As a result of these factors, the DXS service providers surveyed grew by an average of only 0.5 per cent with digital experience services in 2024 – virtually stagnating. This means that they fell well short of the 5.1 per cent revenue growth forecast in the previous year's Survey. The year 2024 also stands out negatively in a long-term comparison: While demand for digital solutions – whether in commerce, marketing or services – rose sharply as a result of the coronavirus pandemic, with many DXS service providers achieving annual growth rates of between 10 and 25 per cent, the economy cooled off as early as 2023, with average revenue growth of only 4.4 per cent.



However, the DXS specialists and generalists surveyed developed very differently. While the specialists recorded an average decline in revenue of 2.5 per cent, the generalists grew by 6.6 per cent with DX services. One of the reasons for this is that hybrid consultancies and IT service providers not only focus on working with corporate functions such as marketing and sales, but also position their digital experience services much more broadly with their customers in various functional areas (logistics, production, HR, etc.) and are more frequently involved in transformation projects that are of high strategic importance and continue even in times of recession. This makes them more crisis-resistant than service providers who still dominate digital agency services and tend to be positioned in areas related to digital marketing.



REVENUE DEVELOPMENT IN THE DXS MARKET: GENERALISTS WITH STRONG GROWTH, SPECIALISTS INCREASINGLY UNDER PRESSURE

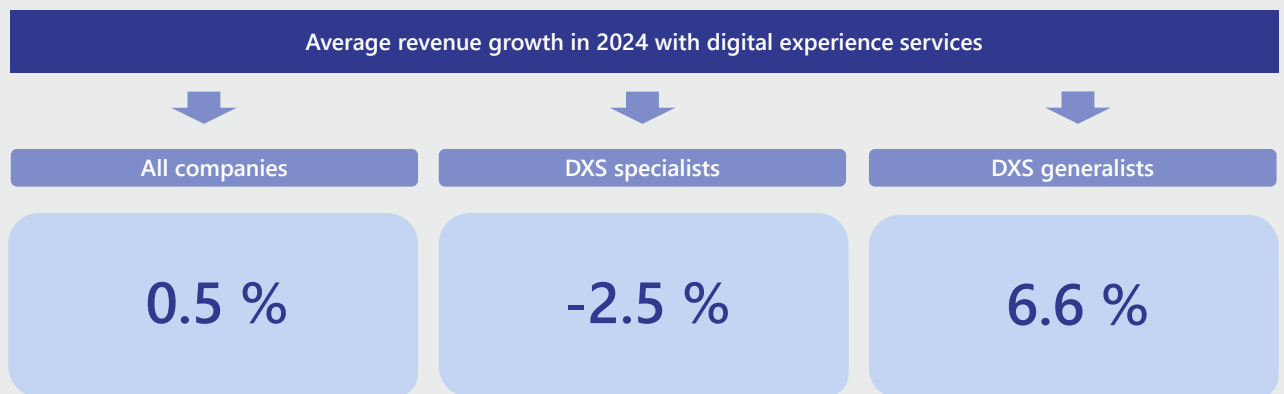


Fig. 31: How did your company's revenue in the "Digital Experience Services" segment in Germany develop from 2023 to 2024?; mean values; n = 18 (all companies); n = 12 (DXS specialists); n = 6 (DXS generalists)

FORECASTS: REVENUE EXPECTED TO PICK UP AGAIN AS THE ECONOMY RECOVERS

However, DXS service providers are more optimistic about the current year 2025 and the years that follow. On average, they expect growth of 5.8 per cent for 2025. However, as the German economy has still not recovered as strongly as hoped, Lünendonk is sceptical about this forecast.

Revenue growth of 9.3 per cent is expected for DX services in 2026 and 9.9 per cent in 2027. It is interesting to compare the different types of providers. For example, DXS specialists, who generate at least 75 per cent of their revenue from digital experience services, expect lower growth. These are generalists, more broadly positioned service providers who also have an extensive DX portfolio and anticipate significantly higher figures. As already described, this is because they operate in a broader environment, often have a stronger technological focus and are more frequently involved in strategic (transformation) projects.



Customer industries, areas of application and developments in customer collaboration

DXS service providers work with customers from a variety of industries. The exact distribution of revenue among these industries is shown below.

The greatest demand for external digital experience services comes from the automotive, industrial and public sectors. While the automotive sector's share of revenue was still 16.5 per cent on average in 2023, it is now 18.3 per cent in 2024. DXS service providers work for automotive companies particularly in the context of infotainment systems, connected services and digital marketing.

The share of sales in the banking and insurance sector has also increased, especially among smaller DXS specialists. In contrast, business with industrial customers and the public sector has developed negatively. One reason for the decline in the public sector is the expiry of the Online Access Act (OZG). Although the next digitisation programme, OZG 2.0, has been in the pipeline since 2024 and the new Ministry for Digital and State Modernisation (BMDS) has raised high hopes for the digitisation of public administration, apart from a few isolated successes, OZG 2.0 has not had a major impact so far. Follow-up studies will show whether investments will be more extensive in the coming years and whether this will be reflected in the revenue distribution of DXS providers.

DXS providers have implemented significantly more projects – over two percentage points more than in the previous year – with energy and utility companies.

18.3%
of the average revenue
of DXS providers comes
from clients in the
automotive sector.



The Market for Digital Experience Services in Germany

CUSTOMER FOCUS IS ON THE MANUFACTURING INDUSTRY

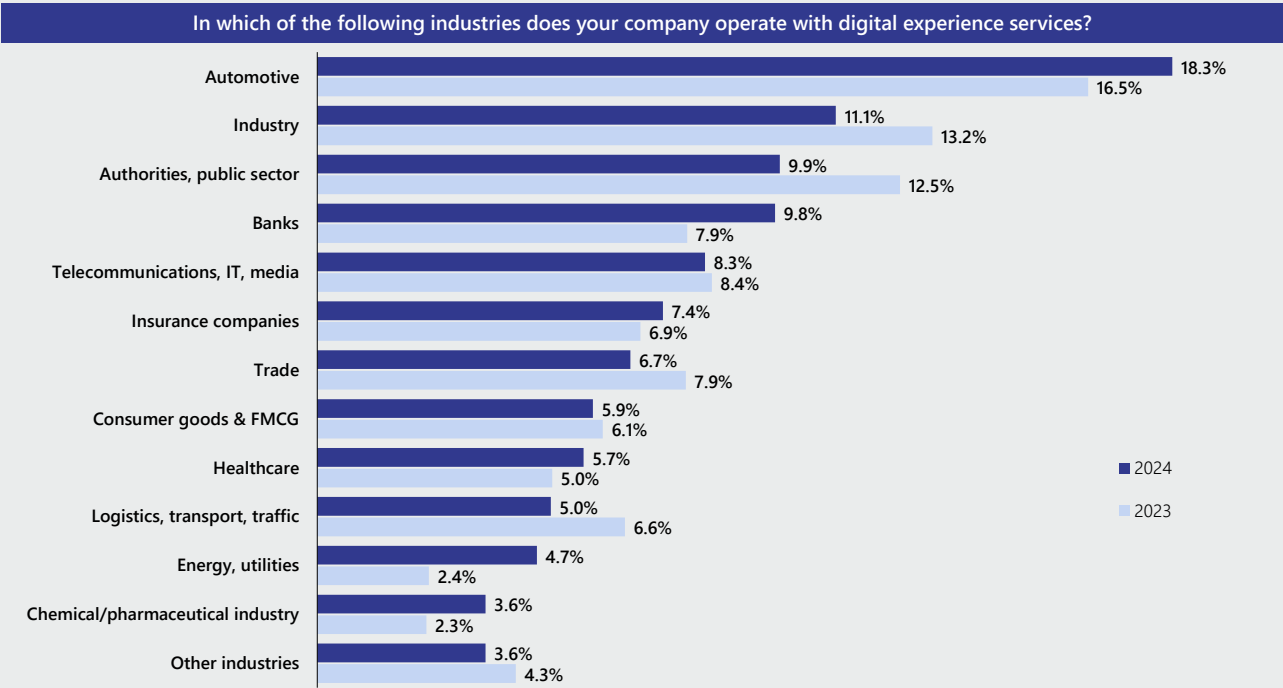


Fig. 32: In which of the following industries is your company active with digital experience services?; mean values; all companies; n = 19 (2024); n = 18 (2023)

DIFFERENT FUNCTIONAL AREAS INFLUENCE THE PROCUREMENT OF DX SERVICES

In addition to the question of who requests projects, it is also crucial to know who is involved in the decision-making process for purchasing DX services. Since complex projects and projects with a high investment volume often involve different stakeholders, there is often talk of a buying network. This reveals a relatively even distribution: although the departments that ultimately work with the solutions are mentioned most frequently (84 %), IT managers, various purchasing managers and senior management also have a significant influence on purchasing decisions from the perspective of DXS service providers. This also depends on the size of the company, its organisational structure and hierarchy.



The Market for Digital Experience Services in Germany

DECISION-MAKERS WHEN PURCHASING DX SERVICES: HIGH RELEVANCE OF SPECIALIST DEPARTMENTS, CDO, AND THE PURCHASING DEPARTMENT

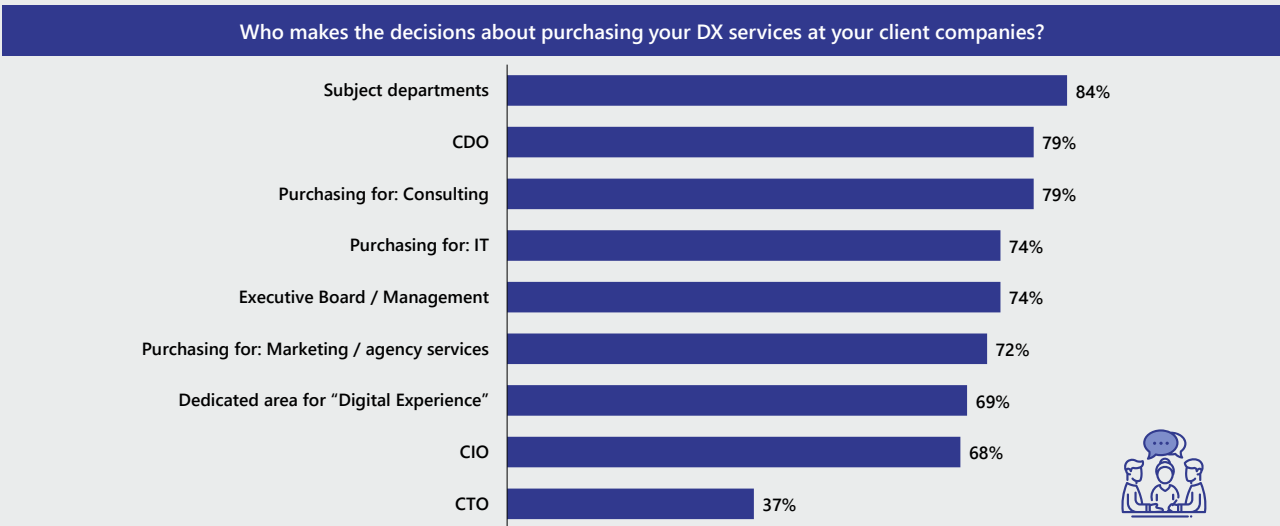


Fig. 33: Who decides on the purchase of your DX services in your customer companies?; scale from 1 = "never" to 4 = "always"; answers shown refer to "often" and "always"; relative frequency distribution; all companies; n = 19

MORE TENDERS IN 2025 THAN IN 2024

Another indicator of how the market and the service providers' business are developing is provided by the question of how the number of tenders to which service providers have been invited or are expected to be invited is developing. While in 2024, roughly one third of service providers stated that the number had increased, remained constant or decreased, just under half of providers say they expect a higher number of tenders in 2025 than in the previous year. The result is therefore in line with the revenue forecasts.

TRENDS IN TENDERS AND IN COOPERATION WITH CUSTOMERS

How will the collaboration between DX providers and customers develop in the coming years, and what trends should be considered? The service providers were also asked for their opinion on this.

Almost all providers (89 %) assume that pressure on fees will continue to increase as expectations for the efficiency of service providers rise due to AI. As the chapter "GenAI as an efficiency and innovation booster" makes clear, the marketing and sales managers surveyed have high hopes for GenAI and expect AI and AI-based agents to enable significant efficiency gains. This expectation is also being placed on DXS service providers, meaning that fees are likely to come under pressure.



The Market for Digital Experience Services in Germany

DXS SERVICE PROVIDERS TEND TO BE INVITED TO MORE TENDERS

How is the number of tenders your company has been / will be invited to developing compared to last year?

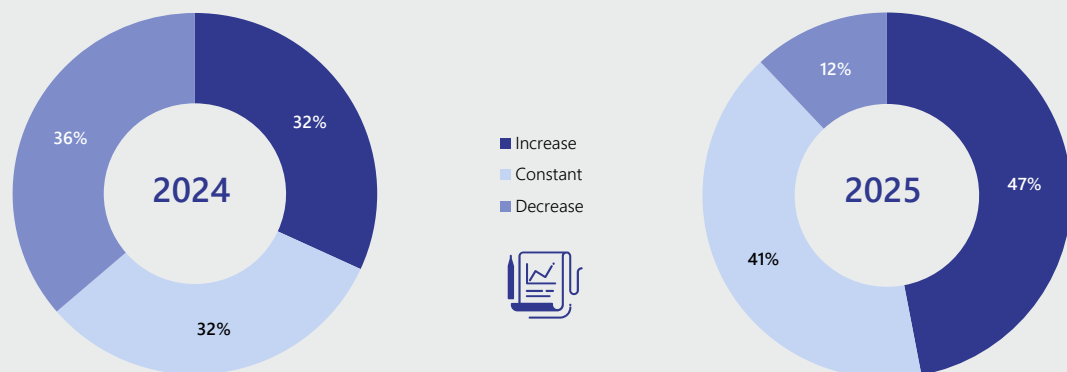


Fig. 34: How is the number of tenders your company has been/will be invited to developing compared to the last year?; relative frequency distribution; all companies; n = 19 (2024); n = 17 (2025)

AI NOT ONLY INCREASES DEMAND FOR SERVICES, BUT ALSO THE PRESSURE TO BE EFFICIENT – TENDERS ARE CHANGING

Which of the following statements about the development of demand for DX services do you observe among your customers?

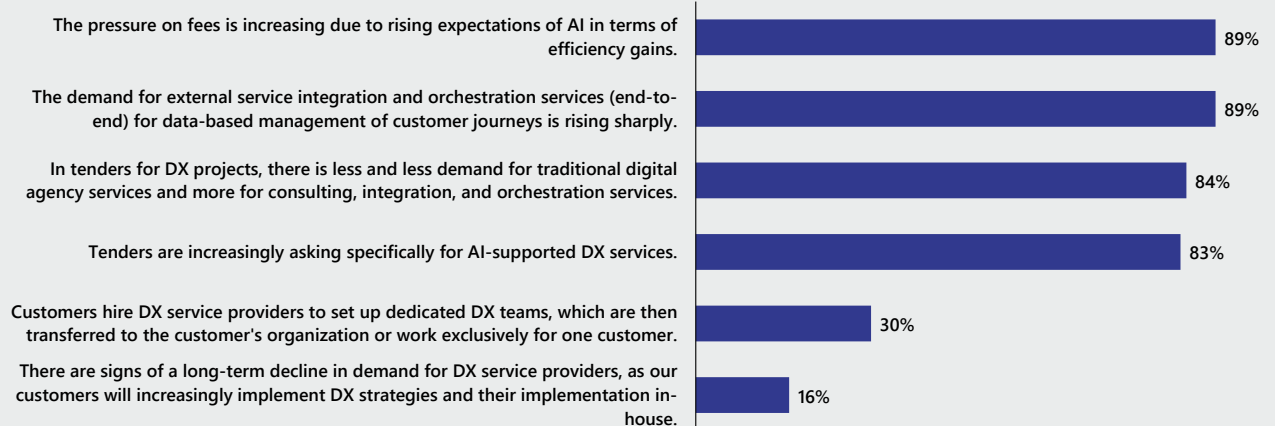


Fig. 35: Which of the following statements about the development of demand for DX services do you observe among your customers?; scale from 1 = "not at all" to 4 = "very strongly"; all companies; responses shown refer to "strong" and "very strong"; n = 20



The Market for Digital Experience Services in Germany

Just as many providers assume that demand for services for integrating and orchestrating services will increase to manage holistic customer journeys based on data. Different customer processes are to be networked even more closely to obtain a holistic picture. 89 per cent expect demand to increase for this integration work, which requires a high level of technical and specialist knowledge to link the various channels and systems.

84 per cent of service providers therefore also assume that traditional digital agency services will be less in demand and that demand for consulting and orchestration services will increase. Almost as many companies (83 %) also expect AI-based DX services to be in greater demand in tenders.

Only three out of ten DXS service providers say they are commissioned by customers to set up DX teams, which are then either transferred to the customer's organisation or work exclusively for the customer. This special form of cooperation is only in demand in isolated cases. Similarly, only 16 per cent expect demand for external DX services to decline as DX topics are increasingly implemented internally – meaning that the German DXS market remains a growth market.

IMPACT OF AI ON COLLABORATION BETWEEN SERVICE PROVIDERS AND CUSTOMERS

The Survey also examined how the increasing maturity of AI at user companies is affecting collaboration with service providers. 41 per cent say that more service providers are needed to orchestrate end-to-end process chains to cover the entire customer journey. This shows that the role of external partners is increasingly shifting from pure project implementers to strategic integrators who enable companies to deliver AI-powered customer experiences consistently and end-to-end.

38 per cent assume that as AI matures, more services can be provided internally – for example, because DX processes can be designed more efficiently and external resources are no longer necessary. Similarly, 34 per cent say that fewer traditional agency services are being outsourced to external digital agencies.



The Market for Digital Experience Services in Germany

HIGH LEVEL OF AI MATURITY PROMOTES END-TO-END PROCESSES AND LEADS TO GREATER DEMAND FOR EXTERNAL PARTNERS

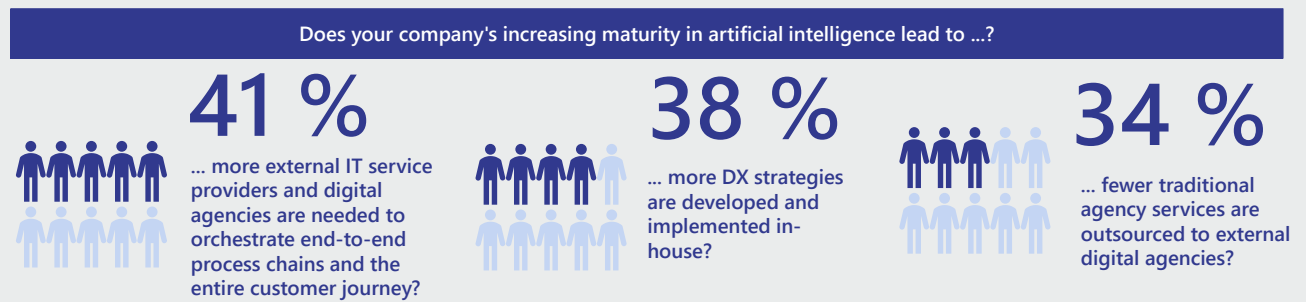


Fig. 36: Does an increasing level of maturity in artificial intelligence within your company lead to...?; multiple answers; relative frequency distribution; all companies; n = 158



Nearshore and offshore delivery

The continuing tight labour market – at least for data, AI and cyber security, as well as individual software development skills – and cost and fee pressure from user companies are leading to changes in the delivery structures of DXS service providers. In recent years, for example, the share of nearshore and offshore service provision has increased.

According to the providers surveyed, the onshore share in 2024 – regardless of whether services were provided on site at the customer's premises, in the office or from home, but from within Germany – averaged 78.2 per cent. In 2025, this is expected to decline to 74.8 per cent. The nearshore share, on the other hand, is expected to increase from 13.2 to 15.9 per cent. Large IT service providers and consulting firms, or "generalists", want to significantly increase their share: at 19.5 per cent, this was already above average in 2024 and is expected to rise to as much as 25.6 per cent in 2025. DXS specialists only want to slightly increase their nearshore share from 9.5 to 11.1 per cent.

INCREASING THE PROPORTION OF DELIVERIES FROM NEAR- AND OFFSHORE LOCATIONS DUE TO TIGHT CUSTOMER BUDGETS AND A LACK OF LOCAL SKILLS

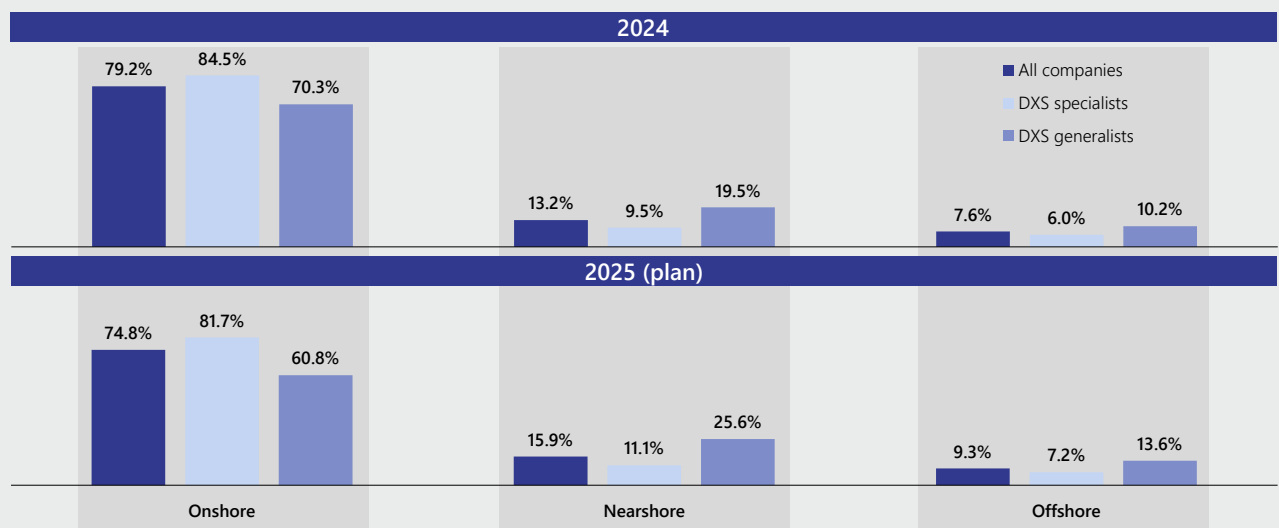


Fig. 37: What percentage of the services you provide for DX projects for customers in Germany are performed in the following regions?; mean values; n = 16 (all companies); n = 10 (DXS specialists); n = 6 (DXS generalists)

The Market for Digital Experience Services in Germany

Offshore services, on the other hand, are still rare in the DX environment, but will already account for 7.6 per cent in 2024. An increase to 9.3 per cent is expected for 2025.

The DXS service providers were also asked in which shoring countries they offer their services. In nearshoring, the focus is on Portugal, Romania and Poland, with a few isolated cases in Bulgaria, Serbia, Spain, Czechia and Switzerland. India clearly dominates in offshoring. Capacities in Egypt, Brazil, South Africa and the Philippines are also used, but rarely.

INDIA IS BY FAR THE MOST POPULAR OFFSHORE LOCATION, WHILE NEARSHORE LOCATIONS ARE SIGNIFICANTLY MORE FRAGMENTED

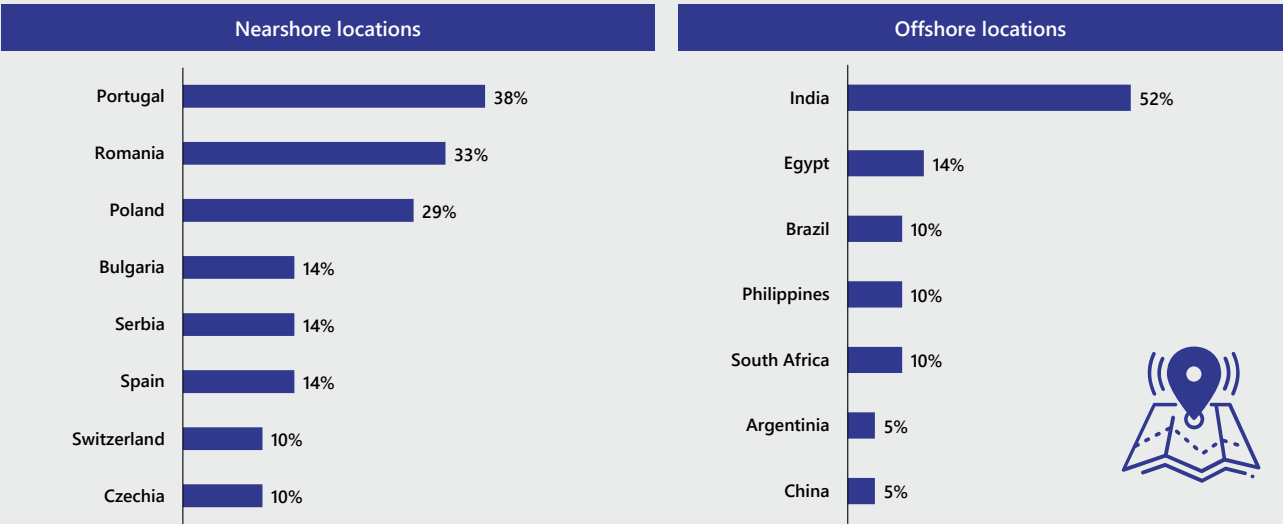


Fig. 38: Which near- and offshore locations does your company use?; at least two mentions; relative frequency distribution; all companies; n = 21



Conclusion and Outlook

AI DISRUPTS THE DXS MARKET

The results of the Survey clearly show that the DXS market in Germany is undergoing radical change. Technological developments relating to (generative) AI are having a major impact: the way in which content and campaigns are created, and customer processes are conceived is changing fundamentally. Generative AI is acting as a driver of efficiency and innovation in this area. At the same time, it should be noted that most of the companies surveyed have so far only used generative AI selectively and not across the board or have not integrated it across processes in their technology stack to control entire customer journeys. However, there are high hopes that AI agents will take on tasks independently or in conjunction with other agents (multi-agent systems). 53 per cent of user companies therefore assume that agentic AI will take customer personalisation to a new level.

GEO: NOT YET STANDARD, BUT GAINING GROUND

While SEO and SEA have long been the be-all and end-all for appearing as a relevant company on Google, the most important search engine, this is changing with Generative Engine Optimisation (GEO). Tools such as Gemini, Google Search Generative Experience (SGE) and other AI models are increasingly being used to provide search queries with clear and relevant answers directly. For companies, this means that the parameters for being classified as relevant by Google's AI and found by users are changing.



CONCLUSION AND OUTLOOK

The Market for Digital Experience Services in Germany

More search queries are also being made directly via AI models such as ChatGPT or Gemini, meaning that information must be prepared in such a way that it is considered important by the AI and not primarily by the user. As this development is still in its infancy, only 18 per cent of companies have developed campaigns specifically for AI and virtual agents.

AI AGENTS ENABLE IMPROVED CUSTOMER PERSONALIZATION - USERS ARE ALSO INCREASINGLY RELYING ON THEIR OWN DX SKILLS

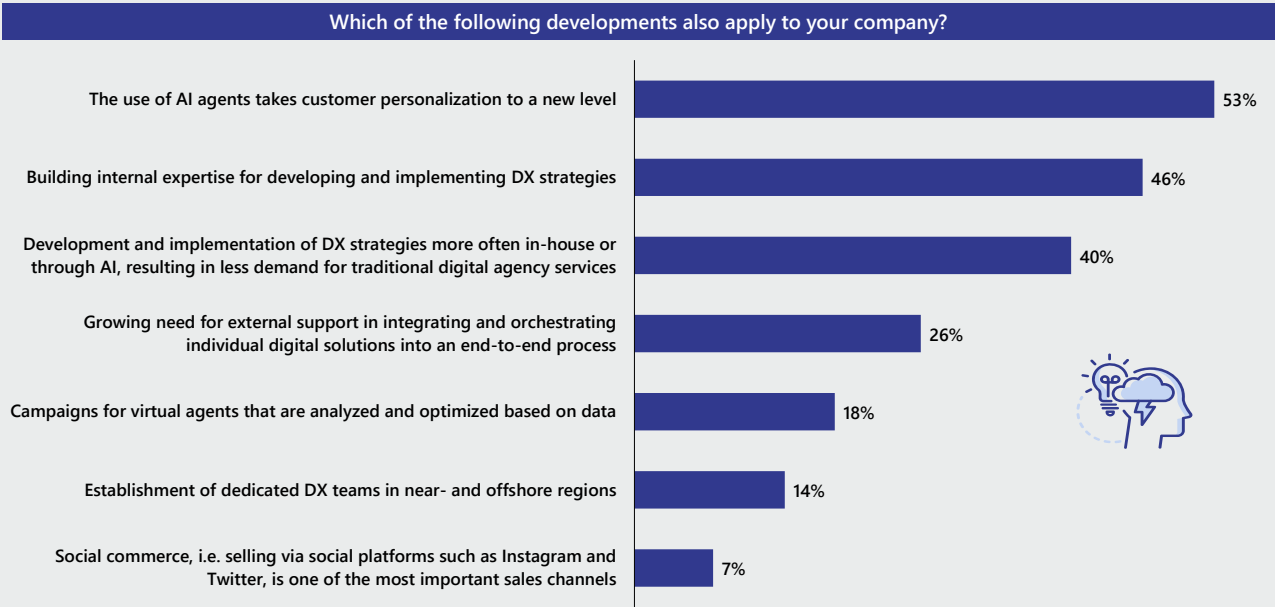


Fig. 39: Amidst the conflicting forces of digital transformation, skills shortages, and AI as a disruptive technology, we are observing a number of developments in the market. Which of the following developments also apply to your company?; multiple answers possible; relative frequency distribution; all companies; n = 153

AI LEADS TO LOWER DEMAND FOR AGENCY SERVICES FROM DXS SERVICE PROVIDERS; CONSULTING, TECHNOLOGY AND ORCHESTRATION BECOME MORE IMPORTANT

DXS service providers are also heavily affected by AI, which is changing their business. Traditional agency services such as the creative production of campaigns, content, images or videos have been (partially) automated by generative AI.



CONCLUSION AND OUTLOOK

The Market for Digital Experience Services in Germany

As a result, the share of revenue generated by digital agency services has been declining since 2023. Consulting, technology and orchestration services are becoming more important, which primarily benefits the large IT service providers and consultancies active in the DXS market. 40 per cent of user companies therefore state that there is less demand for external agency services, as these are increasingly being implemented internally or internally by AI. 46 per cent therefore want to expand their internal expertise in the development and implementation of DX strategies. At the same time, around one in four companies (26 %) state that there is greater demand for orchestration services to form end-to-end process chains and better manage customer journeys holistically.

CMO AGENDA: BUILD ON PROVEN STRATEGIES, DEVELOP NEW ONES – WITH THE HELP OF DIGITAL TECHNOLOGIES

Although the use of AI is changing many things, marketers, sales and commerce managers continue to bear a large proportion (85 %) of the investment in media production – although this is now more often AI-supported. Managed DX services and the hosting of customer-facing solutions are also a key investment focus for 75 per cent of companies. Social commerce via platforms such as Instagram or TikTok is also a priority for 71 per cent, although only 7 per cent of companies say that social commerce is one of their most important sales channels. Data plays a central role in virtually all areas of business, including marketing and sales, with 61 per cent investing more heavily in data and AI, for example to create personalised offers or increase the level of automation in customer processes.



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
- Syzygy
- Valtech

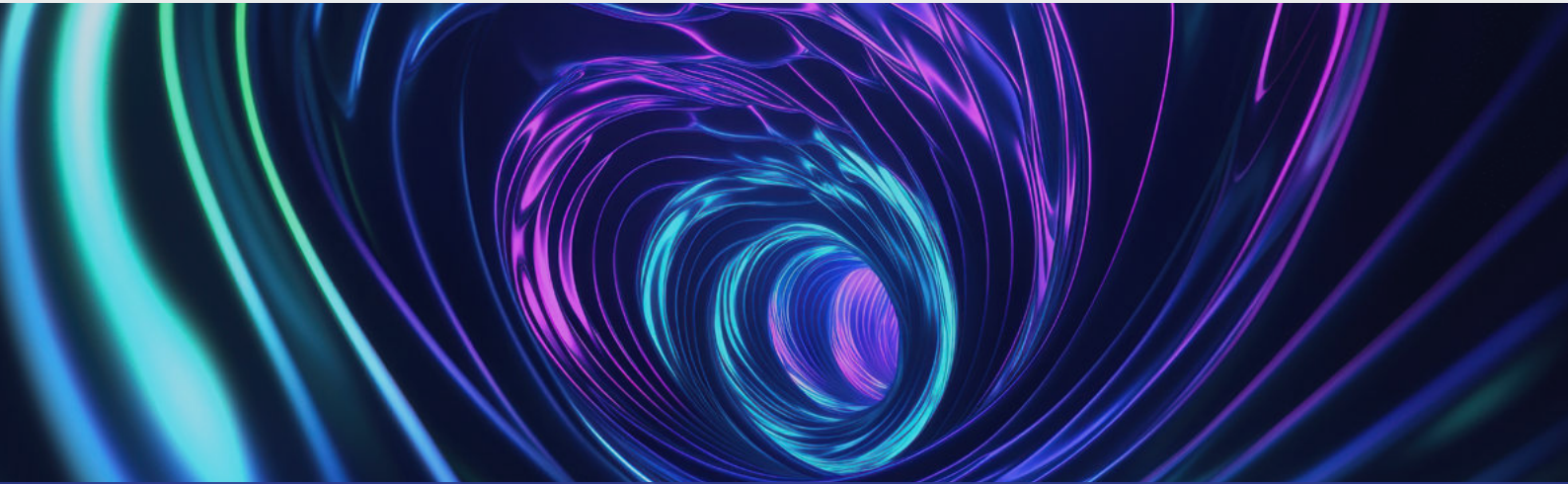
We would like to take this opportunity to express our special thanks to all the participating companies and the Lünendonk & Hossenfelder GmbH evaluation team. Many thanks for their comprehensive support in the preparation of this Lünendonk® Survey.

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!





Contribution from survey partners

INTERVIEW WITH CONCLUSION.....80
Tilman Au, Managing Director

INTERVIEW WITH PLAN.NET GROUP.....84
Jens-Christian Jensen, Chief Strategy Officer

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David Toma, Vice President Strategy & Consulting DACH



"Conclusion sees itself as a strategic partner for companies that not only want to use AI, but also want to embed it structurally."

In an interview with Tilman Au, Managing Director of Conclusion DACH and CEO of diva-e Conclusion, it becomes clear how companies today are dependent on a new level of collaboration and scaling. Conclusion is pursuing a clear course: specialisation, integration and strategic partnership.

Tilman Au emphasises that traditional service provider roles are no longer sufficient. Instead, co-creation, speed and the ability to structurally embed technological innovations such as AI in companies are needed. The goal: sustainable digital solutions that not only work, but also generate real business impact.



Tilman Au
Managing Director
Conclusion DACH
CEO
diva-e Conclusion

LÜNENDONK: Since last year, diva-e has been part of the business transformation and IT service provider Conclusion. How do you view the first year together?

TILMAN AU: The first year was marked by exciting development work. At the beginning of 2025, we officially founded Conclusion DACH with diva-e Conclusion and Conclusion Intelligence – the starting point for an independent ecosystem in the German-speaking market. While diva-e Conclusion brings many years of experience in the field of digital experience to the table, Conclusion Intelligence complements this with in-depth expertise in data and AI.

We are using the ecosystem model from Benelux as a template, where Conclusion has already established a network of over 30 specialised companies in five strategic domains. We are now launching this model step by step in the DACH region – through targeted acquisitions and organic growth.

The DACH market has specific requirements: a high degree of specialisation, complex customer structures and a strong need for local proximity. This is exactly where Conclusion DACH comes in – with regional relevance, European scale and integrated delivery for companies that take a holistic approach to their digital transformation.

"The DACH market has specific requirements: a high degree of specialisation, complex customer structures and a strong need for local proximity."



Tilman Au
Conclusion

”

The Market for Digital Experience Services in Germany

This development also forms the basis for our further growth in Europe. Conclusion is pursuing the goal of significantly increasing its total revenue by 2030 – with considerable potential in the DACH region as well. At the same time, Conclusion is also investing in Iberia, strengthening our position as a European ecosystem for business transformation and IT services.

LÜNENDONK: The market for IT services in Germany is characterised by intense competition. What areas does Conclusion focus on?

TILMAN AU: Conclusion takes a different approach to traditional IT service providers: we are building an ecosystem of specialised companies that support customers in their digital transformation. The focus is on five domains – Experience, Software & Development; Data & AI; Enterprise Applications; Business Consulting and Cloud & Mission Critical.

Each company retains its entrepreneurial spirit and contributes its expertise – this creates flexibility, specialisation and scalability. The companies not only work together on a project basis, but also share methods, platforms and delivery standards. This creates a common quality framework with room for specialisation.

In my view, this ecosystem approach is the key to success. Especially in the complex digital industry, this creates real added value: we react quickly, combine in a targeted manner and delve deeply into the respective specialist disciplines.

LÜNENDONK: And on the industry side? Are there any focus industries that Conclusion DACH concentrates on in particular?

TILMAN AU: Yes, in the area of digital experience, we focus on the B2B manufacturing, automotive, retail and finance industries – with a strong footprint among customers such as dmTech, Zeiss and Viega. In Data & AI, we focus on telco and the health sector, where we already have a successful partnership with Redcare/ShopApotheke. Looking ahead, we want to expand this industry focus in a targeted manner, leverage synergies and strategically tap into other sectors.

LÜNENDONK: In the digital experience services market, diva-e has been operating under the new name diva-e Conclusion as part of the Conclusion Ecosystem since this year. What has changed for your customers?

"In my view, this ecosystem approach is the key to success."



Tilman Au
Conclusion

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The Market for Digital Experience Services in Germany

TILMAN AU: diva-e Conclusion continues to stand for digital experience expertise.

What is new is the scalability provided by the Conclusion ecosystem: we utilise nearshore and offshore capacities, synergies with other companies – such as Conclusion Intelligence – and provide comprehensive support to customers. Our specialist expertise remains intact, but is complemented by Conclusion's resources and reach with over 4,500 experts internationally.

LÜNENDONK: What can diva-e Conclusion customers expect from synergies with other areas of Conclusion?

TILMAN AU: When we combine digital experience with data & AI or enterprise applications with cloud & mission critical, we create integrated solutions that go beyond individual disciplines. Regions and companies within the ecosystem complement each other in a targeted manner – missing competencies are covered by specialised partners. For our customers, this means one central point of contact, but access to the full expertise from all domains.

LÜNENDONK: Let's talk about the digital experience market. How did your 2024 financial year develop and how is 2025 going so far?

TILMAN AU: 2024 was a year of consolidation. The market situation was tense, customers had to implement cost-cutting programmes, and budgets were reduced or postponed. 2025 also remains challenging. But the Conclusion ecosystem is the right partner in these times – thanks to enterprise readiness with onshore and offshore capacities, cross-domain delivery and scalable implementation power.

LÜNENDONK: Specifically, which topics are currently driving high demand for external DX services among your customers?

TILMAN AU: Many companies are currently facing the challenge of making their processes more efficient while developing new digital offerings. Services such as technology and architecture consulting, the modernisation of existing platforms and the development of digital customer interfaces are therefore in high demand at.

diva-e Conclusion is responding to this demand with an integrated approach that considers customer experience, user-friendliness, employee needs and brand impact together. This is based on a system that combines strategy, technology, data and organisation – with the aim of not only implementing digital solutions, but also making them permanently effective.

"For our customers, this means one central point of contact, but access to the full expertise from all domains."



Tilman Au
Conclusion



The Market for Digital Experience Services in Germany

LÜNENDONK: Artificial intelligence has been unleashing its disruptive power for almost two years now. How is AI already affecting the services you offer?

TILMAN AU: AI is already part of our delivery. We automate processes, improve quality and increase speed. With the Composable AI Suite from diva-e Conclusion, for example, we offer ready-to-use AI modules for language, image processing, personalisation and automation – ready-to-use, GDPR-compliant, scalable and flexibly integrable.

We also invest specifically in AI expertise, develop new role profiles and advise our customers on how to embed AI not just as a tool, but as a strategic component of their organisation – with a comprehensive view of all relevant processes, systems and areas of application.

LÜNENDONK: And the customers? How will AI affect the collaboration between customer and service provider?

TILMAN AU: When used correctly, AI improves collaboration: processes become faster, decisions more informed, and repetitive tasks are eliminated. This creates space for strategic partnerships. The classic service provider becomes a strategic enabler and co-creation partner – with a focus on business impact, time-to-value and sustainable customer experience.

LÜNENDONK: Looking to the future: what comes after generative AI and agentic AI? Are there already new trends on the horizon?

TILMAN AU: We are in the midst of the AI shift. In the coming years, it can be assumed that many roles will evolve through the use of AI agents – some will be supplemented, others reimaged. This will have an impact on working methods, profiles and the talent market.

Conclusion sees itself as a strategic partner for companies that not only want to use AI, but also want to embed it structurally.

"We also invest specifically in AI expertise, develop new role profiles and advise our customers on how to embed AI not just as a tool, but as a strategic component of their organisation."



Tilman Au
Conclusion

”

"Velocity is not the reward after transformation, it is the engine of transformation."

Digital markets are evolving faster than ever. In an era of ongoing geopolitical tensions and volatile conditions, efficiency alone is no longer enough. Companies must learn to continuously and flexibly adapt to new realities.

Jens-Christian Jensen, Chief Strategy Officer at the Plan.Net Group, advocates for a radically new principle in this interview: Velocity – the ability to remain relevant at speed. He explains how agencies today go far beyond creative services to support companies holistically throughout their transformation journey.



Jens-Christian Jensen
Chief Strategy Officer
Plan.Net Group

LÜNENDONK: Many companies are currently focusing primarily on efficiency – reducing costs, streamlining processes, cutting budgets. Why are you advocating 'velocity' as a new principle instead?

JENS-CHRISTIAN JENSEN: Because efficiency is necessary, but not enough. The world has changed – and so have the demands on brands and businesses. We no longer live in stable, predictable markets. Instead, we are living in a time of constant reconfiguration: geopolitical tensions, technological disruptions, social shifts. In such a world, accelerating processes is not enough. It is about developing the ability to constantly reinvent yourself.

Velocity means staying relevant faster. It is not purely a question of speed, but above all of adaptability. Those who can quickly adjust to new conditions today gain real competitive advantage – not only in communications, but across the entire value chain.

LÜNENDONK: Velocity means change – but what does that mean for the people in the organisation?

"Velocity means staying relevant faster. It is not purely a question of speed, but above all of adaptability."



Jens-Christian Jensen
Plan.Net Group

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The Market for Digital Experience Services in Germany

JENS-CHRISTIAN JENSEN: Change is never easy – and that also applies to Velocity. But we see in many projects that it's not just about new processes or tools. Velocity changes the way people work. And that can be very liberating.

When internal structures are simplified, decisions are made faster, and responsibility is taken more directly, the personal relevance of one's contribution often increases. People feel more impact. That motivates them.

The classic advice – start small, make successes visible – also applies here. But the key is that velocity puts people back at the center. It's not about control, it's about impact. And that creates entirely new forms of collaboration-with more autonomy, clarity, and purpose.

LÜNENDONK: What does Velocity mean for the relationship between brands and consumers?

JENS-CHRISTIAN JENSEN: We are experiencing unprecedented dynamics in consumer behaviour and expectations. Trends appear and disappear in real time. Communication channels change radically. Brand images are being challenged and reevaluated by social movements, new generations, and global crises.

In today's world, relevance is no longer a steady state, but rather an ongoing process. Brands that react too slowly not only lose touch, but also trust. Velocity becomes a prerequisite for strong customer relationships.

And the best thing is: those who take this dynamic seriously can use it to their advantage. We see with our customers those quick reactions – through early recognition, bold testing and consistent implementation – have an immediate effect on brand KPIs. Speed is not an end, but creates proximity, relevance and differentiation.

LÜNENDONK: You refer to velocity as a structural capability. What factors are currently slowing companies down the most in terms of velocity, and what conditions would need to be created to overcome these?

JENS-CHRISTIAN JENSEN: In our day-to-day work, we encounter the same structural obstacles over and over again – regardless of industry or company size. There are three main factors: organisation, technology and data.

"Brands that react too slowly not only lose touch, but also trust."



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Traditional corporate structures follow the logic of departments, hierarchies and responsibilities. In many cases, this leads to organisational inertia, where responsibility is delegated rather than assumed. Instead, companies should focus on organisational modularity, where teams work according to common KPIs, make decisions independently and are orchestrated rather than controlled by management.

The second major hurdle is technological fragmentation: most companies have impressive IT landscapes, but these are often isolated solutions that have developed over time. Integration takes place retrospectively and is often provisional.

The key to greater velocity lies in composable architectures that can be flexibly combined and expanded and that map the customer experience across all channels – even for channels that may not yet exist today.

Third, data silos slow things down: data is available, but not accessible. Customer data is stored in different systems, market data in different formats, performance data in separate dashboards. Data becomes information, but not insight, not knowledge, not the ability to act. Only when data is networked and contextualized through intelligent interfaces does it become a navigational tool that brings speed and precision to decision making.

Velocity means turning speed into impact – with flexible systems, adaptive structures, and networked data rooms. To achieve this, companies need to move beyond rigid planning cultures and embrace a culture of continuous realignment.

LÜNENDONK: What role does artificial intelligence play in this development?

JENS-CHRISTIAN JENSEN: In our view, AI is the catalyst for velocity. It does not replace fundamental transformation, but it accelerates it massively – provided the foundations are right.

Many of our customers are now realizing that AI enables the automation of digital processes that were previously purely manual: content creation, analysis, personalisation, orchestration. This suddenly turns speed into scale.

However, AI always amplifies what is already there. Those with fragmented processes, unclear data situations and rigid structures will not become faster with AI, but more chaotic. Conversely, AI unleashes its full potential where organisation, technology and data are already modular.

"Most companies have impressive IT landscapes, but these are often isolated solutions that have developed over time."



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Plan.Net Group

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We currently distinguish between three areas of application:

- Generative AI: Automated content creation – from text to video – at high speed and quality.
- Decision Intelligence: Automated analyses that enable data-driven decisions – for example, for campaign optimisation or budget control.
- Agentic Systems: AI agents that independently perform tasks such as monitoring, reporting or controlling entire workflows.

A practical example: We are currently developing so-called content supply chains for several customers – in other words, AI-supported automation of classic production processes. Based on a journey framework, complete marketing campaigns and lead paths are created from delivered 3D data, which are then independently optimised by AI agents.

LÜNENDONK: How is the role of agencies changing in this context?

JENS-CHRISTIAN JENSEN: As an agency, we need to reinvent ourselves. As a digital agency, our mission has always been to rethink, improve and take our clients' businesses to the next level – not just in communications, but in marketing, sales and service.

We support our clients not only creatively, but also as consultants, enablers and implementers – all the way through to the development and operational implementation of complete marketing operating models. In this context, artificial intelligence is the logical next step: automating a digital transformation that was previously done manually.

We find working on operating models particularly exciting because it brings together strategic consulting, technological excellence, and operational responsibility. We not only develop target visions and process structures, but also take on parts of our clients' marketing, sales and service activities ourselves – with a clear goal in mind: better tools, smarter architectures, networked data rooms. And implementation that gets results.

A good example is our work for BMW: Together with the client, we developed a completely new agency model for the European marketing organisation. This model replaced the previous structures – with a clear focus on speed, quality and impact. We redefined processes, standardised them and made them scalable. Content can now be efficiently reused and centrally orchestrated. A shared data pool provides the basis for better decisions.

With AI, we take this model to the next level. On the one hand, through an agent framework that automates repetitive tasks in content production – and on the other hand, through decision AI that makes data explorable and supports marketers as a copilot.

"As an agency, we need to reinvent ourselves. As a digital agency, our mission has always been to rethink, improve and take our clients' businesses to the next level."



Jens-Christian Jensen
Plan.Net Group



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We currently see the biggest efficiency gains in the area of content production: 3D data is used to create fully automated assets and campaigns along a journey framework – especially in the lower funnel. However, we are also increasingly implementing mid- and upper-funnel projects. The vision of an AI-powered, self-optimizing content supply chain is no longer a pipe dream for us, but a living reality.

For us, velocity is therefore not just a consulting topic, but also an implementation topic. And above all: a partnership topic.

LÜNENDONK: What advice would you give to companies that want to start using Velocity now?

JENS-CHRISTIAN JENSEN: Don't wait for the perfect strategy. Velocity doesn't come from PowerPoint, it comes from practice. The most important step is getting started. Empower small teams, try new decision-making processes, pilot modular technologies, and use data in new ways. We see time and time again that velocity is not the reward after transformation, it is the engine of transformation.

And the great thing is: The fundamentals are there. The question is not whether companies have talent, technology, and data. The question is how they combine them. Those who can do that have a real advantage.

"The vision of an AI-powered, self-optimizing content supply chain is no longer a pipe dream for us, but a living reality."



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Plan.Net Group

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"A high-quality, consistent digital experience can only be created when internal processes and external touchpoints are connected."

Reply is recognized as one of the leading technology consultancies in Digital Experience. Particularly in the area of Artificial Intelligence and Generative AI, the company demonstrates how agent-based systems can not only automate processes but also actively shape both customer and employee experiences.

In this interview Dr. Thomas Hartmann and Thorben Fasching discuss the potential of AI agents, the growing relevance of digital humans, and intelligent platforms that seamlessly integrate customer journeys and employee experiences.



Dr. Thomas Hartmann
Member of Board
Reply Deutschland SE



Thorben Fasching
Executive Partner
Reply Deutschland SE

LÜNENDONK: Dr. Hartmann, the last few months have been marked by various AI innovations. AI agents and multi-agent systems are gaining ground as evolutionary developments of classical generative AI. What is the potential of these two models?

DR. THOMAS HARTMANN: We are experiencing a fundamental shift: AI systems are evolving from reactive helpers to proactive actors. Agent-based AI can independently make contextual decisions and initiate processes. Its potential far exceeds that of traditional chatbots. AI agents can generate individual product recommendations in real time in e-commerce, proactively identify and solve problems in support, or analyse leads in sales and create automated, tailor-made offers.

What is particularly exciting is that these technologies can be applied across industries, from manufacturing to finance to mobility. One practical example is "Devbot", an agent-based AI chatbot that helps manage Audi's cloud infrastructure. Devbot automates repetitive support tasks, detects potential vulnerabilities and optimises the use of resources.

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The Market for Digital Experience Services in Germany

LÜNENDONK: According to the Lünendonk survey, almost a third of companies already use AI agents in customer service, marketing and sales. How do agent-based systems affect personalisation and customer journey orchestration?

DR. THOMAS HARTMANN: AI agents automatically respond to service requests, create content in real time and intelligently orchestrate customer journeys. The next stage of development is the multi-agent systems mentioned at the beginning. Together, they solve complex tasks autonomously and enable a situational and emotional customer approach – while simultaneously reducing costs. As a result, AI agents are evolving from “automators” to strategic partners in experience management.

One use case is our “Prebuilt AI Apps”: proven, generative AI agents that make it easy for businesses to get started with AI and deliver measurable benefits from the first time they use them. They empower marketing teams by enriching campaign briefings with market trends, customer data, and competitive analysis for precise, effective messaging. In human resources, they simplify resume updates and create a dynamic skills map that reveals talent and encourages its development.

LÜNENDONK: Let's take a step back. Many companies have complex IT landscapes and are still struggling with AI integration and experience orchestration. What strategies are you using to overcome fragmentation, a lack of standards and increasing complexity?

DR. THOMAS HARTMANN: Many organisations struggle to integrate AI into heterogeneous IT landscapes. Fragmented data sources and a lack of standards prevent consistent experience orchestration. In our customer projects, we see strong demand for generative AI combined with data-driven personalisation and automated content production. Our approach is based on a balanced mix of strategy, technology and creativity. With targeted investments in AI applications, cloud-native experience platforms and digital products, we create scalable, user-centric experiences. This enables the efficient implementation of omni-channel strategies. A concrete project illustrates this: Reply helped fintech company Riverty build an AI-powered customer service platform in just 100 days. The solution, based on Microsoft Dynamics 365, integrates intelligent features such as automatic routing, context recognition and Microsoft Copilot Studio for voice and chatbots. Phone, chat, and email channels are now centrally integrated. The result is faster resolution times, higher customer satisfaction, and a scalable architecture that keeps people at the center.

"AI agents are evolving from “automators” to strategic partners in experience management."



Dr. Thomas Hartmann
Reply

"Many organisations struggle to integrate AI into heterogeneous IT landscapes. Fragmented data sources and a lack of standards prevent consistent experience orchestration."



Dr. Thomas Hartmann
Reply



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LÜNENDONK: The study shows that AI agents, hyper-personalisation, DX platforms, and digital identities are rapidly gaining traction. What are the biggest stumbling blocks - and how can you help your customers overcome them?

THORBEN FASCHING: The biggest challenges lie not in the technology itself, but in how it is implemented strategically. That's why we support our customers by providing end-to-end architectures that connect fragmented systems, ensure data quality and make the most of modern IT architectures. At the same time, we address regulatory requirements in order to deliver secure, compliant solutions.

Companies thus benefit from scalable, technically sophisticated solutions that ensure a consistent user experience and brand-appropriate communication. This is particularly evident in digital visibility: while SEO remains important, Generative Engine Optimisation (GEO) is gaining ground. In the future, content will need to be designed to be instantly discoverable, easily understandable, and trustworthy to AI systems so that it can be correctly interpreted, cited, and used in generative models.

LÜNENDONK: In addition to strategy and visibility, the experience itself plays a central role. Customer and employee experiences are becoming increasingly intertwined. What is crucial to delivering a consistent, high-quality digital experience for both?

DR. THOMAS HARTMANN: Customer and employee experience are inextricably linked. It is crucial that both sides have access to consistent systems and a shared database. Employees need simple, intelligent support to deliver personalized, real-time experiences to customers. A high-quality, consistent digital experience can only be created when internal processes and external touchpoints are connected.

Digital humans provide a scenario for how digital experience can be improved. Modern systems of this kind use AI not only to analyse data, but also to recognise the tone of voice and mood of users and respond in a fact-based yet empathetic manner. Technologies such as Nvidia's 'Audio2Face' make it possible to equip digital avatars with authentic facial expressions, thus creating natural interaction. One example from the Reply Group is the digital human "Futura", a digital travel expert for cruise guests. She provides assistance in multiple languages, makes personalised recommendations and adapts her responses to the traveler's mood using Emotion AI. Digital humans can also act as virtual coaches, train new employees, or create interactive training courses.

"The biggest challenges lie not in the technology itself, but in how it is implemented strategically. "



Thorben Fasching
Reply



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As virtual HR assistants, they can answer questions about vacations, benefits, or IT processes quickly and in a personalized manner. In doing so, they improve the employee experience by providing targeted support to employees, while at the same time improving the customer experience by engaging with customers on an emotional level. The key is to connect both worlds through a common, consistent platform for a seamless digital experience.

LÜNENDONK: However, seamless experiences require the underlying architecture to be right. Both composable enterprise and best-of-suite solutions are popular approaches. At the same time, data quality is becoming a key factor. How can companies find the right path – and what role do end-to-end approaches play in this?

THORBEN FASCHING: Both composable enterprise and best-of-suite approaches have their advantages. What matters is not the architecture, but the data foundation: For AI systems to unleash their full potential and deliver consistent experiences across all channels, data must be harmonised, secure and accessible. That's why we focus on end-to-end approaches that combine data management, security, and experience orchestration. This is especially important for omnichannel strategies, where traditional CMS systems are reaching their limits. Headless composable content solutions can help with one-time content creation, reusability, and faster time-to-market. For many customers, this agility is critical today.

LÜNENDONK: Right from the start of the interview, it became clear that Reply's approach is based on a balanced mix of strategy, technology and creativity. You provide creative impetus with formats such as the Reply AI Film Festival. What role do such initiatives play in your culture of innovation and what inspiration can companies draw from them?

THORBEN FASCHING: Technological innovation comes from creative application. With the Reply AI Film Festival, we have created a space where AI is used as a creative sparring partner. Under the motto "Generation of Emotions", we saw in Venice that AI is now capable of conveying emotions in a believable way: a milestone that many still considered unattainable. For us, these formats are not just "showcases"; they are real spaces for experimentation. They foster our culture of innovation, inspire employees and clients alike, and demonstrate how AI is transforming content creation for advertisers: from innovative approaches to storytelling, directing, 3D visualization and sound design, to the production of high-quality films and commercials. This allows creativity and quality to be seamlessly combined and sets new standards in content production. This shows companies that it is not enough to view AI purely from a technical perspective. It is crucial to create spaces for creativity, the courage to experiment and new perspectives. This is where the most innovative applications often emerge – and this applies across all industries.

"For AI systems to unleash their full potential and deliver consistent experiences across all channels, data must be harmonised, secure and accessible."



Thorben Fasching
Reply

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"How companies can best prepare for the agent era in order to exploit the full potential of this development."

The use of artificial intelligence (AI) has long gone beyond mere efficiency. AI agents are becoming a critical factor in a company's competitiveness. Not only do they automate work processes, but they also scale quality, develop solutions, and make decisions. Is this the pinnacle of agentic value creation? Not at all, says Frank Wolfram, CEO of the SYZYGY Group. AI agents can only realize their full potential when they work in teams with their human colleagues. What exactly is needed today for companies to realise the full potential of agent-based systems? Frank Wolfram answers these questions in an interview.



Frank Wolfram
CEO
SYZYGY AG

LÜNENDONK: Mr. Wolfram, AI agents are all the rage, with large tech companies like Amazon, Google, Microsoft, and Salesforce, as well as startups and other service providers, investing heavily in their development. As a result, new innovations and agent solutions are emerging every day. Are we on the verge of a revolution?

FRANK WOLFRAM: Indeed, we are experiencing a fundamental technological leap. Software has long been a tool for routine tasks – now it is becoming an intelligent team member. This is fundamentally changing knowledge work and business models, giving companies a competitive edge. At the same time, a paradigm shift is taking place: from software as a service to service as software. AI agents are no longer mere tools, but are becoming autonomous workers in their own right. For us at SYZYGY, one thing is clear: we are shaping this change – as an agentic system builder that combines technology with clear business benefits and helps companies to use agents responsibly and effectively.

LÜNENDONK: Such a revolution also creates uncertainty. Many decision-makers are asking themselves how they should approach the agent era and how to make it future-proof. Where does SYZYGY come in to support – more in terms of strategy, use case development or implementation?

"Software has long been a tool for routine tasks – now it is becoming an intelligent team member."



Frank Wolfram
SYZYGY AG



The Market for Digital Experience Services in Germany

FRANK WOLFRAM: We provide comprehensive support to companies. We start with strategic questions: What do we want to achieve with AI agents? How will we measure success? Together, we identify relevant use cases and advise on technology selection. And we implement solutions. At the same time, we help empower people to work with agentic systems.

LÜNENDONK: If we consider marketing as a playing field for AI agents, where are the most promising areas of application?

FRANK WOLFRAM: We focus on four areas:

- 1) Automated workflows with AI agents along the entire communications value chain, from initial briefing to final output.
- 2) Smart content production for creating images, texts and videos. This replaces time-consuming photo shoots, automates the creation of variants and reduces the costs for stock and licensed material.
- 3) AI-boosted customer experience, enabling natural language interaction with content and services, real-time advice and a personalised approach.
- 4) GEO, the optimisation of brand representation in AI models. This includes the contexts in which brands appear, how they are evaluated, and with which attributes they are associated. This positioning must be measured and actively controlled.

LÜNENDONK: What are the key requirements for agents to go beyond pilot projects and truly make an impact within the company?

FRANK WOLFRAM: For agents to deliver valid and business-relevant results, the fundamentals must be right: clearly defined workflows, available training data, a robust IT infrastructure, and clear legal and compliance rules. Domain knowledge is equally important – only by incorporating domain knowledge into systems can real value be added. That is why the human in the loop remains indispensable. Empathy, creativity, and critical judgment set the stage for the success or failure of AI agent systems and make their operation scalable and reliable.

LÜNENDONK: For you personally: In your opinion, what is the biggest stumbling block that companies should not underestimate when introducing agent systems?

"For agents to deliver valid and business-relevant results, the fundamentals must be right: clearly defined workflows, available training data, a robust IT infrastructure, and clear legal and compliance rules."



Frank Wolfram
SYZYGY AG

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FRANK WOLFRAM: The biggest mistake is to think of AI agents as just another tool. They will only realise their potential if they are seen as colleagues and integrated into work processes. This requires training – not only in AI skills, but also in the ability to think across functions, train AI agents, professionally evaluate their results, and curate them in line with business goals.

That is why we develop multidisciplinary M-shaped profiles with broad expertise and ideally three areas of specialisation – for example, in strategy, design or technology. They effectively contribute their human strengths and expertise to the work results and can control, evaluate and improve agentic systems.

LÜNENDONK: You are very focused on the future. Looking three years ahead, what developments in agent systems will have the greatest impact on marketing?

FRANK WOLFRAM: Our report "[Marketing 2030 - How we convince people and machines](#)" outlines the near future: Personal assistants such as Siri, Alexa and ChatGPT will become independent AI agents. They will perform entire tasks – from research to purchase – and know their users' preferences. They will make personalised selections, ask the right questions, and curate results in the user's best interest.

Marketers must learn to communicate not only directly with their audiences, but also with their AI assistants as they become the gatekeepers between people and brands. Some purchase decisions will involve purely machine-based dialogues between AI assistants on the user side and AI agents on the brand side. Even today, customer journeys are increasingly starting with AI chats. This requires consistent brand representation in AI models.

LÜNENDONK: What recommendations can you give CMOs today to prepare for this development?

FRANK WOLFRAM: Generative Engine Optimisation (GEO) is becoming increasingly important for companies and brands to stay visible. Brand content needs to be prepared in such a way that it can be consistently represented in AI models. To achieve this, brands should already be feeding their content, values, differentiation and positioning into data and content ecosystems such as Reddit or Quora, which are increasingly being used by AI systems as training sources. In addition, brands must not lose themselves in hyper-personalisation to avoid diluting their brand identity. This is because brands need consistency in their approach and message in order to be recognised by people and AI systems.

"The biggest mistake is to think of AI agents as just another tool. They will only realise their potential if they are seen as colleagues and integrated into work processes."



Frank Wolfram
SYZGY AG



In addition, brands and companies will need AI agents that can exclusively handle requests from personal AI assistants and provide them with brand-appropriate, timely, and relevant information quickly and in a customer-centric manner. Overall, this means that CMOs will need to focus not only on the customer experience, but also on the agent experience to remain relevant in this new reality.

LÜNENDONK: The future seems to be fast approaching. How can we keep up pace and still remain calm?

FRANK WOLFRAM: For me, curiosity is the key: staying open-minded, trying things out, remaining courageous and confident – and relying on your own strengths. For decision-makers, the following applies: if you feel that the pace is too fast, you should seek out targeted support and work with the right partners in order to be able to exploit the potential of the AI revolution.

"Generative Engine Optimisation (GEO) is becoming increasingly important for companies and brands to stay visible."



Frank Wolfram
SYZYGY AG



"Digital experience is the critical dimension for measuring, scaling, and strategically managing customer experience as a whole."

Customer experience (CX) is no longer just a UX issue – it is a key value driver. Yet many companies still underestimate or do not systematically leverage the contribution of CX to revenue, margins, and customer loyalty. This article discusses how companies can turn individual touchpoints into a genuine "value engine" along the entire customer journey. The focus is on four key levers: increasing conversion, customer loyalty, higher willingness to pay and efficiency gains through smart, data-driven experiences. As decision-makers, you will receive practical guidance on how CX initiatives can be linked to real business metrics. And why classic KPIs such as NPS alone are not enough. We also offer concrete recommendations on how companies can strive for successful CX.



David Toma
Vice President Strategy &
Consulting DACH
Valtech GmbH

FROM EXPERIENCE TO ECONOMIC EXPECTATION

Customer experience (CX) is no longer a differentiator. It is the ticket to many markets. Whereas in the past, a few standout touchpoints created excitement, today's customers expect consistent, personalized, and relevant experiences-both digital and analog. What was once a positive surprise is now taken for granted. These new expectations affect every industry. Whether B2C or B2B, the benchmark is no longer the competition within your own sector, but the best digital experiences in general – from Apple to Spotify to Walt Disney. Those who fail to meet these expectations will lose customers, trust and relevance.

This article deliberately focuses on the digital dimension of customer experience – that is, experiences with websites, apps, platforms, and data-driven services. However, digital experience is not an isolated part. Digital experience is the critical dimension for measuring, scaling, and strategically managing customer experience as a whole. A recent global study by Valtech of more than 1,000 car buyers shows that customer expectations are shifting significantly from a pure product experience to consistent, personalised and trustworthy journeys. More than 57 per cent of EU respondents want to complete the entire purchase process online, while 81 per cent expect human assistance at critical moments.

"Customer experience (CX) is no longer a differentiator. It is the ticket to many markets."



David Toma
Valtech

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The Market for Digital Experience Services in Germany

Several years ago, Gartner predicted that around 80 per cent of all B2B sales interactions between suppliers and buyers would take place through digital channels. Recent studies such as McKinsey B2B Pulse 2024 and the DynamicWeb B2B eCommerce Report 2024 confirm this development: Digital and hybrid models now dominate the interaction mix, and in many companies, up to 50 per cent of sales are already generated via portals or e-commerce orders.

Further research underscores the importance of CX. Ipsos CX Global Insights 2025 shows that 70 per cent of customers choose brands based on their expectation of a good experience. This signals that experience is now as important as product or price in choosing a brand. In addition, KPMG's Customer Experience Excellence Study 2024 shows that CX pioneers not only win satisfied customers, but also loyal customers and are more resilient in times of crisis. Factors such as empathy, integrity and personalization are clear competitive advantages.

Nevertheless, CX remains a secondary issue in many organisations compared to traditional core functions such as sales, finance or operations. Too often, it is located solely in marketing, UX or service. However, a truly good customer experience can only be created if it is not viewed in isolation from the perspective of individual departments or silos. It must be understood and implemented as a joint task across all functions.

The central question is no longer "Do we need a better customer experience?" but rather "How does our experience contribute to value creation? The data is clear: companies with consistent, high-quality CX achieve higher growth rates, lower churn rates, and significantly higher brand loyalty. CX is not a "soft factor" – it is a hard driver of revenue, margin, and loyalty.

THE FOUR LEVERS OF EXPERIENCE VALUE CREATION

Customer experience is never neutral – it always has an impact. It affects sales, margins, and market value, either positively or negatively. When done right, good CX impacts the entire value chain: it increases conversion rates, builds customer loyalty, and increases willingness to pay. At the same time, modern CX reduces costs. Companies that think strategically about experience activate four key levers that have a measurable impact on revenue, margins, and loyalty.

"CX is not a
"soft factor", it is a hard
driver of revenue, margin,
and loyalty."



David Toma
Valtech



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1. Conversion – Smoothness brings sales

Now more than ever, purchase decisions are driven by the quality of the digital experience. When the path to completion is simple, clear and fast, the likelihood of a purchase is increased. Conversely, even small friction points, such as multiple forms, loading delays, or an inconsistent checkout process, can cause customers to abandon a purchase with a single click. Forrester analysis shows that in industries such as automotive, improving the CX Index by just one point can generate more than one billion US dollars in additional revenue – assuming that provided that brands consistently work on customer loyalty, service quality and relevance.

2. Retention – Consistency and quality generate loyalty

Customer relationships do not happen by accident. They are the result of many positive, trusting experiences. When you meet or exceed expectations every time, you increase the likelihood that customers will remain loyal-even when cheaper alternatives are available.

Customer loyalty has become a critical success factor, especially in fragmented markets. Last year's KPMG study clearly shows that companies with a high level of CX maturity measurably retain customers longer and significantly reduce churn – because they reliably meet user expectations and create emotionally relevant experiences.

For example, a leading international telecommunications and streaming provider uses AI-supported data analysis to identify customers who are likely to churn based on their behaviour at an early stage and proactively counteract this with targeted measures. The key is to tightly link emotion, trust and brand experience over time. This is most effective when companies create a consistent ecosystem. Apple's closed experience network, for example, works so seamlessly that customers don't want to leave.

3. Willingness to pay – experiences create value

When products are technically similar, it is the experience that matters. Customers are willing to pay more if they feel understood, well guided, or gain trust in the provider. This creates psychological value that is reflected in actual price behaviour. Recent studies show that customers are willing to pay more for an outstanding experience.

A Qualtrics analysis shows that 72 per cent of customers accept higher prices when brands offer a special experience; depending on the context, the willingness to pay is even higher (e. g. 84 % when flying, 68 % for better service). Valtech's "The Customer Odyssey" study also shows that two-thirds of respondents are willing to pay between eleven and 30 euros per month for digital services in their cars – especially if these experiences are perceived as intuitive, useful and trustworthy.

"When products are technically similar, it is the experience that matters."



David Toma
Valtech

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Younger audiences, such as Gen Z and Millennials, are very open to experiential premium models. Premium is not created in the product, but in the mind of the user. CX is the differentiator in an environment of functional equivalence.

4. Efficiency – CX saves resources and creates scalability

A positive customer experience not only reduces effort on the customer side, but also internally. Intuitive interfaces, clear navigation, and self-service options result in fewer inquiries, faster processes, and increased first-time resolutions. This makes experience a lever for operational excellence. Several recent studies show that targeted CX investments can reduce operating costs by 15 to 30 per cent, depending on the industry, digital maturity and degree of automation. This is especially true for customer service, order fulfillment, support requests, and payment and complaint processes. Internal efforts such as manual escalations, media disruptions, or duplicate data entry can also be significantly reduced through well-designed CX.

AI-supported assistance systems such as Lexus' 'Digital AI Concierge' (Valtech) or Next Best Action models at Zurich not only improve the customer experience. The systems measurably increase closing rates, efficiency and service quality – with response times up to 70 per cent faster.

"Customer experience is only a true value driver if it can be measured and managed."



David Toma
Valtech

CX AS A TRUE DISPERSION VARIABLE

Customer experience is only a true value driver if it can be measured and managed. Many companies still rely primarily on isolated satisfaction indicators such as the Net Promoter Score (NPS) or simple survey results – but these are no longer sufficient in today's competitive environment. In order to establish CX as a sustainable success factor, a set of key performance indicators is needed that takes three dimensions into account:

- 1) **Customer Perception** – Perception (how customers experience the interaction),
- 2) **Customer Behaviour** – Behaviour (what they do before and after, e. g. purchase, cancellation, interaction)
- 3) **Business Outcome** – Result (the economic effect).

More and more companies are linking qualitative CX data with hard KPIs such as customer lifetime value, churn rate, purchase frequency and channel usage. Successful market participants are therefore translating their customer experience into a company-wide control logic. This can take the form of experience scorecards, North Star KPIs or customer health indices that directly link CX goals to P&L-relevant metrics.



The Market for Digital Experience Services in Germany

This is not only a technical challenge, but also a cultural one: CX must be embedded as part of target agreements, reporting systems, and management routines – on equal footing with revenue, margin, and efficiency. This necessarily includes a data and learning culture that empowers all employees to use and understand data in a GDPR-compliant way, and to make fast, results-driven decisions based on it.

RECOMMENDATIONS FOR DECISION-MAKERS

Customer experience can reach its full potential when it is understood as a strategic management task – not as an isolated marketing measure or project initiative! For decision-makers, this means that CX belongs in business logic and requires clear goals, measurement points and connectivity across all functions.

EXPERIENCE MUST GENERATE BUSINESS IMPACT

Customer experience should never be pursued as an end in itself. At its best, it starts where it makes a direct contribution – for example, through higher conversion rates, lower churn or greater loyalty. This way, CX does not become a ‘soft factor’ but a key driver of revenue, margin and efficiency.

CLEARLY DEFINE RESPONSIBILITY

The question of responsibility is equally important. Without clear ownership – for example, through customer journey owners, CX leads or cross-functional steering teams – many initiatives remain fragmented or get stuck. Successful organisations define clear roles, budgets, and decision-making authority.

TECHNOLOGY AS AN ENABLER

Technology also plays a key role: modern platforms allow data to be analyzed in real time, experiences to be personalized, and processes to be automated. But the value of technology comes when it is used strategically to deliver a differentiated, relevant experience across the entire journey. There is a price premium when technology helps turn good into great. This is clearly visible in wow moments at every stage of the journey. When a signature moment can be experienced, that is CX excellence.

START WITH VISIBLE SUCCESSES

Last but not least, targeted implementation is essential. Rather than embarking on comprehensive restructuring plans, companies should start with a few relevant actions, demonstrate their impact, and systematically learn from them. Quick wins at critical touch points, combined with systematic feedback and KPI-driven management, build confidence and momentum.

"Customer experience can reach its full potential when it is understood as a strategic management task."



David Toma
Valtech



The Market for Digital Experience Services in Germany

CX IS A LEADERSHIP PRINCIPLE

Ultimately, customer experience is not just a project – it is a management principle. It requires constant attention, adaptation and control. When CX becomes a true management discipline, it creates not only better experiences, but also measurable business success.

When you think CX consistently, you are not building another marketing programme, but a new operating system for growth. This aligns people, technology and organisation to create real value. Companies that take CX seriously as a strategic imperative today will set the rules of the industry tomorrow.



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COMPANY PROFILE

Conclusion



Conclusion is an international business transformation and IT service provider with over 4,500 employees. As a bridge builder between strategy, business and technology, Conclusion supports large international companies, medium-sized businesses and public institutions on their digital journey.

Originally founded in the Netherlands, Conclusion is now also active in the DACH region and Iberia. The company stands out thanks to its ecosystem of over 30 specialist expert companies – with expertise in the areas of digital experience, software & development, cloud & mission critical, enterprise applications, business consultancy and data & AI.

Within the domain of digital experience, software & development, diva-Conclusion is the specialist for DXS services in the German-speaking market.

Find more under: www.conclusion.com

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COMPANY PROFILE

The Market for Digital Experience Services in Germany

COMPANY PROFILE

Plan.Net Group

HOUSE OF COMMUNICATION **PLAN.NET** 

The Plan.Net Group is a leading partner for digital consulting, experience, and technology services. We combine these competencies to create an end-to-end approach that uses AI to consistently improve performance in all areas – from transformation consulting to UX/UI design to commerce, customer interaction management, and technology. This enables us to support clients efficiently and effectively on their digital transformation journey.

Drawing on our global expertise in strategy, design, technology, and data, we develop innovative solutions that enhance brand experiences and deliver sustainable impact. By combining creative thinking with data-driven insights, we ensure that every brand interaction is meaningful. Our agile, future-oriented approach empowers companies to stay one step ahead of change and make digitalisation a central part of their identity.

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The Plan.Net Group continuously expands its portfolio. With the launch of 'Agentic Services', it is the first agency group to integrate AI agents and, through Sökosumi – the marketplace for AI agents – enables clients to use their own and external agents in compliance with the EU AI Act on a central platform, thereby providing access to the Agentic Economy.

Renowned companies such as BMW, Lufthansa, REWE Group, Schaeffler and Decathlon rely on the digital excellence of the Plan.Net Group, which currently leads the ranking of Germany's most creative and top-selling digital agencies.



COMPANY PROFILE

The Market for Digital Experience Services in Germany

COMPANY PROFILE

Reply



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Reply specialises in the design and implementation of solutions based on new communication channels and digital media. As a network of highly specialised companies, Reply supports major industrial groups in the telecom and media; industry and services; banking and insurance and public sectors in defining and developing business models enabled by the new paradigms of AI, cloud computing, digital media and the internet of things. Reply's services include: consulting, system integration and digital services.

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-Centered 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 communications. Digital assistants and digital humans enhance the quality of customer service by providing responses that are fast, accurate and empathetic. Through hyper-personalisation – enabled by the intelligent use of CRM, DXP and CDP data – tailored interactions are created that adapt in real time to individual needs. By harnessing AI and Generative AI, Reply increases the efficiency and effectiveness of marketing and enables organisations to deliver a next-level, 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 2025 German BVDW Internet Agency Ranking, Reply ranks second.




COMPANY PROFILE

The Market for Digital Experience Services in Germany

COMPANY PROFILE

SYZYGY

The logo for SYZYGY, featuring the letters S, Y, Z, Y, G, Y in a stylized, spaced-out font.

SYZYGY is one of the leading consulting and implementation partners for digital experiences. We are convinced that positive digital experiences have a significant impact on the quality of customer relationships – and thus determine the success of brands and companies.

The SYZYGY Group was founded in 1995 and is represented in four countries with offices in Bad Homburg, Berlin, Frankfurt, Hamburg, Munich, London, New York, and Warsaw. SYZYGY AG has been listed on the Prime Standard since 2000.

In addition to the core brand SYZYGY, SYZYGY also includes the enterprise technology specialist SYZYGY Techsolutions, the performance marketing and media specialist SYZYGY Performance, the creative company Ars Thanea, and the strategy consultancy different.

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SYZYGY's approximately 500 specialists serve brands such as Audi, BMW, Bosch, the German Federal Government, Condor, Commerzbank, Deutsche Bank, Eucerin, Hilti, HUK-Coburg, Hymer, Kyocera, Lufthansa, Mazda, mobile.de, o2 Telefónica, PayPal, Porsche, Sennheiser, Volkswagen, and Wempe.



COMPANY PROFILE

The Market for Digital Experience Services in Germany

COMPANY PROFILE

Valtech

Valtech *

Valtech is the experience innovation company that exists to unlock a better way to experience the world. With a focus on delivering exceptional business results, we empower brands to leap ahead of the competition and go beyond best practices.

By blending crafts, categories, and cultures, our global team of 6,000 professionals in more than 60 offices worldwide help brands unlock value in a digitally accelerated world. It's at the intersection of insights and perspectives where we leverage the power of data, AI, creativity, and technology to achieve experience innovation for many of the world's best-known brands, including L'Oreal, Mars, Audi, P&G, Volkswagen, and Dolby. See our work at [Valtech.com](https://valtech.com)

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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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