



IDC MarketScape

IDC MarketScape: Worldwide Digital Employee Experience 2026 Vendor Assessment

Phil Hochmuth

Snow Tempest

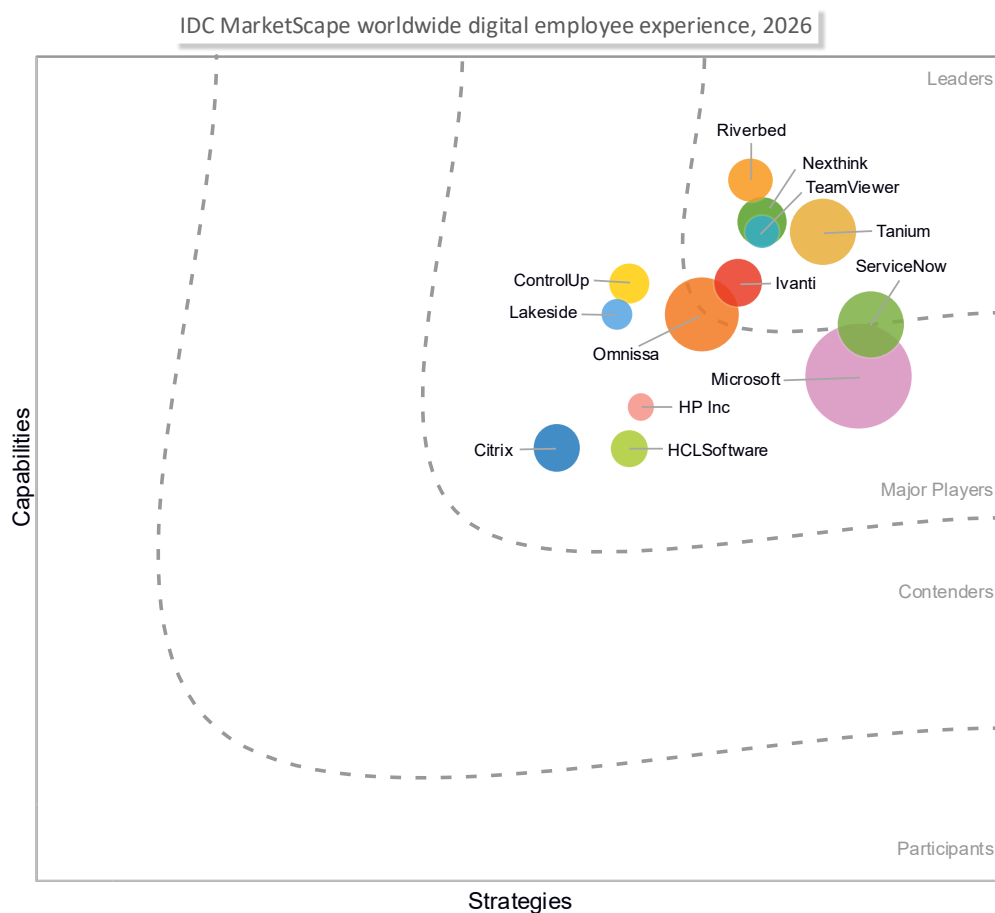
Shannon Kalvar

THIS EXCERPT FEATURES RIVERBED AS A LEADER

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape worldwide digital employee experience vendor assessment



Source: IDC, 2026

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Digital Employee Experience 2026 Vendor Assessment (Doc # US53014625).

IDC OPINION

As enterprises continue to digitally transform business models and processes, what's often overlooked are the experiences employees have with the digital tools and technologies they are given to do their jobs. A bad digital experience — with an application, a service, a system, or an endpoint device — can ripple across an organization, impacting its productivity, revenue, and employee retention. With such critical KPIs at stake, ensuring workers' digital tools are better than "good enough" has become a critical initiative among IT operations teams.

To that end, the digital employee experience (DEX) software market has rapidly evolved to help IT understand pain points, roadblocks, and other challenges with digital tools to improve workforce productivity, reduce digital friction, and align IT operations and service more closely with business outcomes. DEX represents a shift to proactive IT support models, data-driven approaches that continuously monitor, analyze, and optimize how employees interact with digital technologies.

DEX platforms gather telemetry data from endpoint devices (PCs primarily, but also mobile), software applications, and networks while incorporating employee sentiment data (via surveys) and IT service management workflows to deliver a unified view of digital experience. DEX lets IT operations teams identify performance issues, automate remediation, and improve employee satisfaction and operational efficiency.

Adoption of DEX technologies is accelerating as enterprises prioritize hybrid work enablement, workforce retention, and digital transformation initiatives. Worldwide and in North America, 40% of enterprises already use gathered endpoint device/application telemetry to improve end-user experiences. Only 3% of enterprises say they have "no plans" to deploy DEX technology in the near future (source: IDC's *Worldwide Enterprise Device Management Survey*, 2025).

DEX by its nature evolves from, and converges with, adjacent system infrastructure software technologies, including endpoint device management, IT service management, observability platforms, and analytics tools. Vendors are embedding DEX capabilities into broader platforms while also delivering standalone solutions focused on advanced analytics, automation, and employee sentiment measurement.

The competitive landscape reflects this convergence. DEX vendor offerings differentiate based on the depth and sources of telemetry data they collect, the use of AI-driven analytics against collected data, automation and self-healing capabilities (or integration with tools that can do these actions), and integration across other enterprise IT operations and system infrastructure software ecosystems. Specialized vendors continue to innovate with focused DEX capabilities, particularly in experience analytics and employee sentiment measurement.

Over the next 18–24 months, IDC expects the DEX market to evolve in three key directions:

- Automation of functions such as physical device upgrades, as well as procurement/deployment of other key physical resources, supplies, and materials used for work.
- Deeper integration with enterprise systems, including HR, collaboration, and business applications.
- Increased integration of digital experience metrics into business KPIs

Ultimately, DEX will become a foundational component of the digital workplace, enabling organizations to measure and optimize employee productivity with the same rigor applied to customer experience and operational performance.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

Vendors included in this IDC MarketScape were selected based on the following criteria:

- The vendor offers a dedicated DEX solution or embedded DEX functionality within a broader platform (e.g., UEM, ITSM, or observability tools).
- The solution provides telemetry collection and analysis across endpoints, applications, and/or networks.
- The platform includes analytics, reporting, or visualization capabilities that quantify digital employee experience.
- The vendor demonstrates capabilities for proactive or automated remediation, including workflow automation or self-healing features.
- The solution incorporates employee sentiment or feedback mechanisms or integrates with systems that provide such data.
- The vendor has meaningful market presence, including:
 - Enterprise customer adoption
 - Estimated DEX-related revenue (generally \$5+ million annually)
 - Global or regional deployment footprint

- The vendor demonstrates ongoing investment in DEX innovation, particularly in AI, automation, and integration

Both standalone DEX vendors and platform vendors with embedded DEX capabilities were considered, reflecting the converging nature of this market.

ADVICE FOR TECHNOLOGY BUYERS

Buyers evaluating digital employee experience solutions should prioritize the following capabilities and considerations:

- Focus on unified visibility across the digital environment.
- Select solutions that provide comprehensive visibility into endpoint devices, applications, and network performance.
- Note that fragmented telemetry limits the effectiveness of DEX initiatives and can lead to inconsistent insights.

Prioritize actionable insights and automation

DEX value is realized not just in monitoring but in actionable outcomes. Buyers should favor platforms that:

- Identify root causes of digital friction
- Provide prescriptive recommendations
- Enable automated remediation workflows
- Evaluate integration with existing IT ecosystems

DEX solutions must integrate seamlessly with:

- UEM platforms
- ITSM systems
- Security and observability tools

Tight integration ensures that insights can be operationalized through existing workflows and systems.

Incorporate employee sentiment and experience metrics

Leading DEX platforms combine technical telemetry with employee feedback to provide a holistic view of experience. Buyers should ensure solutions include or integrate with:

- Sentiment surveys
- Experience scoring
- Engagement metrics

Align DEX metrics with business outcomes

Organizations should focus on metrics that link IT performance to business value, including:

- Reduction in IT support tickets
- Mean time to resolution (MTTR)
- Employee productivity and downtime
- Employee satisfaction and retention

These metrics are essential for securing executive buy-in and demonstrating ROI.

Assess AI and predictive capabilities

As the market evolves, AI-driven analytics and predictive capabilities will become critical differentiators. Buyers should evaluate vendors' road maps for:

- Predictive issue detection
- Autonomous remediation
- Behavioral analytics

Consider organizational readiness

DEX initiatives require alignment across IT and HR organizations. Buyers should ensure:

- Strong executive sponsorship (CIO/CPO alignment)
- Defined processes for acting on insights
- Clear communication to employees regarding data usage
- The avoidance of data fragmentation and tool sprawl

A key risk in DEX adoption is the proliferation of disconnected tools. Buyers should prioritize platforms or architectures that unify data and avoid silos.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Riverbed

Riverbed is positioned in the Leaders Category in the 2026 IDC MarketScape on worldwide digital employee experience.

Riverbed Technology, founded in 2002, delivers digital employee experience through the Aternity platform — combining endpoint monitoring, application performance, network observability, sentiment, and sustainability analytics. The company maintains direct commercial presence and support across the Americas, EMEA, and Asia/Pacific.

Strengths

Aternity is structured as a converged observability and experience platform that coordinates endpoint telemetry, application performance data, network path visibility, and employee sentiment within a single operational environment. This integrated architecture — spanning physical devices, virtual desktop infrastructure, mobile, and frontline endpoints — is designed to address the diagnostic complexity that arises when experience failures propagate across multiple operational layers simultaneously. The Riverbed IQ layer correlates over 10,000 metrics per minute, which reduces the time operations teams spend assembling context from fragmented sources before they can act. Customers can also conversationally interact to receive suggestions based on the data. In addition, the Aternity Replay feature offers virtual re-enactment to aid in reproducing and troubleshooting issues without needing to interrupt employees' work on their devices.

Aternity combines endpoint, application, network packet, unified communications, and cloud path telemetry into a single correlated data plane. This structure enables teams to reason about experience failures across device, network, and application domains without switching between independent tools, which directly reduces diagnostic lag in complex hybrid environments.

The Riverbed Orion agentic AI framework — introduced in early 2026 — extends Aternity's analytical layer into governed autonomous execution, with role-specific interfaces for employees, service desk staff, IT engineers, and IT leaders. This architecture is notable because it embeds AI governance, policy control, and human-in-the-loop escalation into the platform foundation rather than treating these as secondary configurations added post-deployment. As a result, organizations pursuing a shift from assisted to autonomous operations have a structurally coherent path, rather than an improvised one.

Customer automation activity has grown substantially — from 66 million annualized automations to 266 million — and the 2025 customer base includes highly regulated organizations across financial services, government, and healthcare. This establishes that the platform can sustain high-volume, policy-sensitive operation in environments where governance and audit requirements materially constrain automation design.

Challenges

Aternity's breadth of observability capability is both its primary differentiator and its principal governance risk. The platform surfaces a large and continuously expanding set of signals, insights, and agentic actions; the value derived depends directly on how well an

organization has defined priorities, escalation thresholds, and change-control boundaries before enabling automation at scale.

The breadth of observability in Aternity can overwhelm operations teams if prioritization frameworks are absent. Without explicit rules distinguishing systemic risks from transient anomalies, teams risk accumulating indicator sets that increase cognitive load rather than reducing it — a pattern that undermines the platform's core objective of freeing humans for higher-order work.

Aternity's remediation capabilities are mature at the endpoint layer, but its role as a broader orchestration layer across ITSM, HR, and security platforms is still developing. This creates a structural gap between strong analytical insight and the cross-platform workflow authority needed to eliminate the emergent work that currently reaches service desks. Organizations bridging this gap must invest in integration design or accept that some corrective actions remain manual.

In estates where other observability or DEX platforms are already established, Riverbed must give customers clear architectural guidance on how Aternity complements — rather than duplicates — existing investments. Without that governance framing, the platform risks being perceived as an additional data layer rather than as the authoritative source driving decisions and actions, which can stall expansion and reduce operational impact.

Consider Riverbed when

Consider Riverbed Aternity when your organization operates a heterogeneous, service-critical estate — particularly in financial services, healthcare, or regulated government environments — and requires unified endpoint, application, and network experience observability with a governed path toward autonomous operations, across the Americas, EMEA, and Asia/Pacific.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category

focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

Digital employee experience (DEX) refers to a category of software solutions designed to measure, analyze, and improve how employees interact with digital technologies (both hardware and software) in the workplace.

DEX platforms combine multiple data sources to provide a comprehensive view of employee experience, including:

- Endpoint telemetry (device performance, system health, and boot times)
- Application performance data (responsiveness, crashes, and usage patterns)
- Network performance metrics (latency and connectivity issues)
- Employee sentiment data (surveys and feedback mechanisms)
- IT service management data (tickets, resolution times, and workflows)

The primary objective of DEX solutions is to optimize employee productivity and satisfaction by identifying and resolving digital friction points before they impact users.

DEX represents a shift from traditional reactive IT operations to a proactive and user-centric model that anticipates issues and continuously improves digital environments.

DEX solutions typically include:

- Data collection and telemetry aggregation
- Automation and remediation workflows
- Employee sentiment and feedback tools

- Optimization of device and application performance
- Measurement of employee satisfaction and engagement
- Support for hybrid and remote work environments

As the market matures, DEX is expected to become embedded within broader IT management platforms while also maintaining a distinct identity focused on employee-centric outcomes.

Related research

- *IDC MarketScape: Worldwide AIOps 2026 Vendor Assessment* (IDC #US54116226, March 2026)
- *IDC TechScape: Worldwide Observability and AIOps Platforms, 2026* (IDC #US53349126, March 2026)
- *AI Agents in IT Service Management: Trends to Know* (IDC #US53599226, February 2026)
- *How ITSM Vendors Are Growing by Focusing on Specific Industries and Capabilities* (IDC #US53908325, December 2025)
- *IDC MarketScape: Worldwide Unified Endpoint Management Software 2025–2026 Vendor Assessment* (IDC #US53003125, December 2025)
- *IDC TechBrief: Digital Employee Experience* (IDC #US53638125, July 2025)

Synopsis

This IDC study evaluates vendors in the worldwide digital employee experience (DEX) market, highlighting how DEX platforms are evolving to proactively optimize employee productivity, satisfaction, and operational efficiency. The assessment details vendor strengths, challenges, and market positioning, emphasizing the convergence of DEX with IT operations, automation, analytics, and employee sentiment measurement. As enterprises prioritize hybrid work and digital transformation, DEX is becoming foundational to workplace strategy and business outcomes.

"Modern enterprises thrive or die based on how well their workforce can adapt to, and take advantage of, new digital tools and platforms. Improving employee experiences with these tools should be a critical priority across all levels of enterprise leadership, from IT to line-of-business and C-level executives," says Phil Hochmuth, research vice president, Endpoint Management and Enterprise Mobility. "Enterprises must be thoughtful of use cases and industry-specific requirements when picking a digital employee experience vendor to monitor, analyze, and remediate end-user challenges with devices, applications, and enterprise systems and platforms."

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

Global headquarters

One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com

Copyright and trademark notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit idc.com/about/offices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2026 IDC. Reproduction is forbidden unless authorized. All rights reserved.