Market Guide for Voice of the Employee Solutions

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Initiatives: HR Technology Strategy, Transformation and Management

> Many enterprises struggle to measure employee sentiment and take effective action to improve employee experience. HR technology leaders supporting periodic employee engagement surveys and other continuous listening programs should use this guide to understand emerging trends and available solutions.

Overview

Key Findings

■ It is no longer enough to periodically measure employee engagement. Organizations are seeking more agile, effective and innovative ways of assessing and responding to employee sentiment to improve employee experience.

■ AI is embedded as a core capability for collecting, inferring, analyzing and describing employee sentiment and employee experience. Applied AI ranges from established natural language processing and machine learning techniques to the early use of GenAI for summarization and data storytelling.

■ Voice of the employee (VoE) is an evolving but fragmented market, with no providers meeting all requirements yet. Early adopters are managing multiple sentiment collection and analytics tools to satisfy their needs.

■ Some providers are responding to customer demand by blending VoE with other HR processes, such as performance, recognition, learning, leadership actions and workforce management. Others are exploring the intersection of employee and customer experience. Regardless, both approaches are building an ongoing "sense and respond" capability that crosses application boundaries.

Recommendations

HR technology leaders supporting employee engagement and experience transformation should:

- Deliver deeper, more meaningful engagement and experience insights faster by adjusting VoE strategies (including choice of metrics and measurement intervals).

- Expedite vendor selection by prioritizing differentiating capabilities (e.g., listening professional services, manager enablement, EX insight management), since basic employee listening features are expected in today's market.

- Pick the best option from many possible alternatives by prioritizing the data sources and collection/measurement methods that best fit their organization.

- Adjust to changing organizational and employee needs by piloting innovative enabling technologies and by being prepared to swap out technology components for more mature alternatives.

- Make VoE initiatives actionable by equipping stakeholders with insights to support internal initiatives such as individual career development and recommended actions that can be delivered to broader employee segments.

Market Definition

Gartner defines voice of the employee (VoE) solutions as those that collect and analyze employee opinions, perceptions and feelings. They use surveys, feedback tools and other data sources to gather worker sentiment and infer preferences, opinions, and well-being. They deliver insights with actionable guidance to help improve employee engagement, experience, productivity and performance. These solutions are delivered via cloud-based technologies, often augmented by managed services.

Leading organizations are investing to ensure that their employees' actual experience aligns with their employee value proposition. They engage in various employee listening activities to prioritize investments that can improve employee experience across the employee life cycle. They associate this measurement strategy with a highly established practice of periodically measuring employee engagement (quarterly, annually, biannually). VoE solutions include these direct surveys and other feedback tools to better capture employee perceptions, feelings, opinions and ideas. Robust collection and analysis of employee feedback with actionable guidance results in:

- Earlier problem spotting and quicker response due to faster data collection and direct delivery of insights to managers

- Deeper feedback for managers on team perceptions and performance

- Better data for longitudinal analysis

- Improved employee engagement, learning, development and retention

- Efficient idea management

- Enhanced employee experience, employment value proposition, worker performance and productivity over time

- Enablement of an organization's "sense and respond" feedback loop for employees and managers, when connected with other HR solutions, enterprise applications and digital workplace technologies

The standard capabilities for this market include:

- Employee listening surveys of various types, including annual engagement, periodic pulse engagement (smaller question sets and sample sizes than annual surveys), other pulse surveys (such as event-driven, inclusion, culture well-being and ad hoc), and key "moments that matter"

- Access to benchmarks (typically by industry, geography, company size and other variables)

- Analysis of survey results and delivery of role-based reporting (such as insight dashboards to managers, summary analytics to organization leaders and segmented insights to HR business partners)

- Linkage of survey results (either automated or via professional services) to recommended actions to address issues at supervisory, managerial, executive or organizational levels.

The optional capabilities for this market include:

- In-depth support of the manager role, including prescriptive advice and coaching to improve manager performance

- Collection of data from collaboration tools and other applications to analyze behavior and communication patterns, and ultimately infer perceptions and sentiment

- AI-driven support of online focus groups and conversations, including theme and sentiment analysis

- Correlation of employee experience data to customer experience metrics and insights

- Delivery of ongoing professional services support to help organizations build VoE strategy, develop valid survey questions, administer surveys, interpret results, and build or communicate action plans

Market Description

Organizations deploy VoE solutions to deliver current, in-depth, actionable insights that stakeholders can then use to guide improvements to employee engagement, experience, productivity and performance. When connected with other HR and digital workplace technologies, VoE becomes a key component of a "sense and respond" feedback loop that measures a broader set of employee experience (EX) influences (see Figure 1).

Figure 1: How VoE Solutions Enable "Sense and Respond"

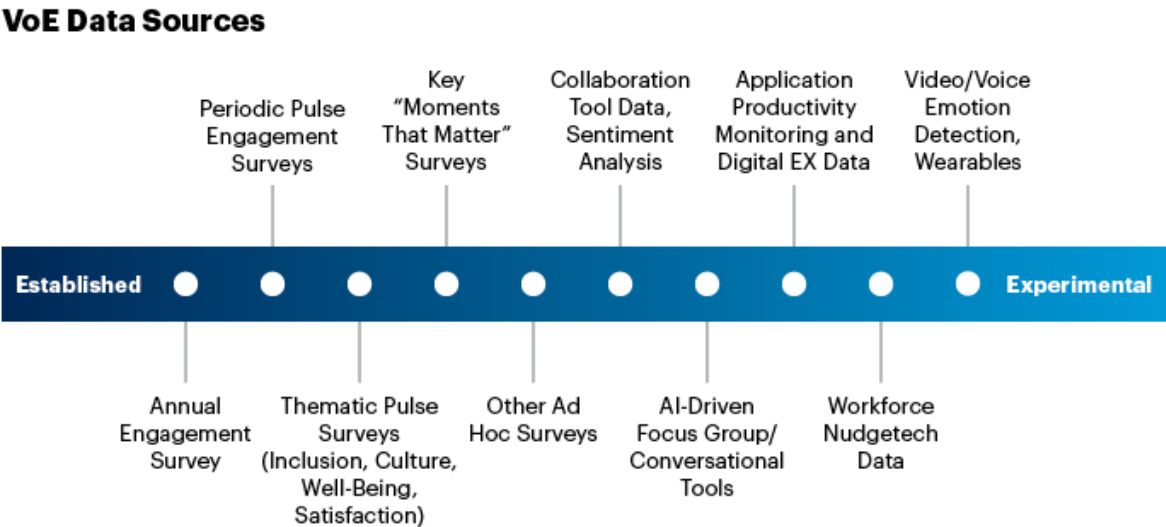**How VoE Solutions Enable "Sense & Respond"**
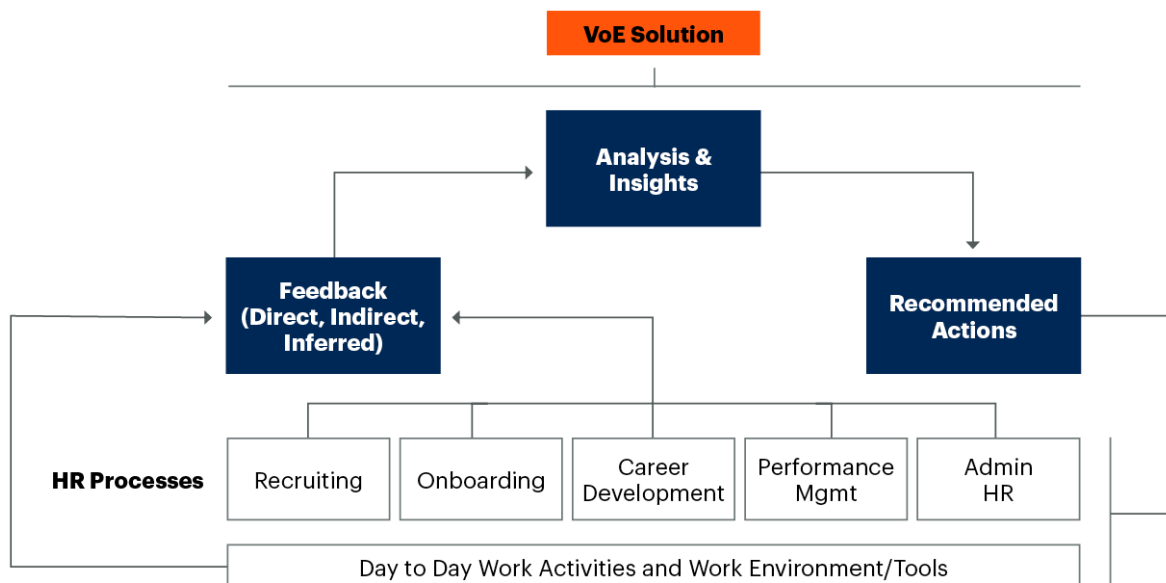
Source: Gartner

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Gartner

VoE solutions aggregate a variety of data from different sources that vary in market adoption from the established to the experimental (see Figure 2 and Table 1).

Figure 2: VoE Data Sources

VoE Data Sources

Established — Experimental

Top labels (left to right):
- Periodic Pulse Engagement Surveys
- Key "Moments That Matter" Surveys
- Collaboration Tool Data, Sentiment Analysis
- Application Productivity Monitoring and Digital EX Data
- Video/Voice Emotion Detection, Wearables

Bottom labels (left to right):
- Annual Engagement Survey
- Thematic Pulse Surveys (Inclusion, Culture, Well-Being, Satisfaction)
- Other Ad Hoc Surveys
- AI-Driven Focus Group/ Conversational Tools
- Workforce Nudgetech Data

Source: Gartner
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Gartner

Table 1: VoE Data Source Details

(Enlarged table in Appendix)

Data Source ↓	Adoption/Direction ↓	Description ↓	Uses/Benefits ↓
Annual engagement surveys	80%+ Slowly Shrinking	Gather data to analyze the fundamental drivers of employee engagement (e.g., relationship with supervisor, trust in senior leaders, tools/training to perform in the current job, sufficient career opportunities, adequacy of compensation and benefits).	Provides a regular baseline for analysis of changes by year for various workforce segments (e.g., business unit, region, department, manager).
Periodic pulse engagement surveys	60%+ Growing	Supplemental short question sets (typically 5-6) aligned to the annual survey typically delivered to a random sample of the total employee population.	Shortens the annual survey while preserving statistical validity of data and reducing survey fatigue.
Thematic pulse surveys	50%+ Growing	Additional short question sets (on topics such as inclusion, culture, well-being, satisfaction) delivered to a random sample or a specified employee segment.	Gathers sentiment on broader employee experience drivers in a statistically valid fashion while reducing survey fatigue.
Key "moments that matter" surveys	45%+ Growing	Short surveys aligned to or triggered by employee life cycle and personal events such as onboarding, return from leave, transition to a new role, exiting the organization.	Collects and analyzes feedback to improve the employee experience at critical moments of the employee life cycle.
Other ad hoc surveys	35% Growing	Short surveys typically sent after organizational communications or announcements, or following an interaction with an employee-facing service or system.	Provides quick feedback on effectiveness of communications. Enables measurement of employee satisfaction with a service or technology.
Collaboration tool data sentiment analysis	15% Growing	Gathers data from collaboration tools' users to analyze usage patterns and ultimately infer perceptions and sentiment. Sometimes includes analysis of text in public, or even private, conversations.	Doesn't require active participation or response from employees. Based on what employees do versus what they say.
AI-driven focus group/conversational tools	10% Growing	Derives more in-depth insights on a specific topic based on either a participant's direct feedback or a participant's reaction to other participant feedback.	Enables a deeper dive into a topic. Synchronous focus groups provide real-time feedback and synthesis of themes. Asynchronous tools enable topics to be left "open" for a specific time for participants to weigh in at their convenience.
Application, productivity monitoring and digital EX data	10% Growing slowly*	Analyzes usage data from tools used for core work assignments and derives sentiment based on how the tools are used by various worker types. Most common in organizations with an IT-centric or productivity-focused view of VoE.	Gathers data without the need for direct employee feedback. Can drive in-depth productivity analysis. Can provide feedback to drive improvements in core work technologies.
Workforce nudgetech data	<5% Growing slowly	A type of AI-enabled choice architecture designed to elicit behaviors that accelerate targeted positive outcomes at the individual, team and/or org. level. Products are starting to take data from employee and manager responses to nudges as inputs to further analysis.	Can help organizations leverage sentiment data from nudges to further "nudge" employees and managers toward recommended actions.
Video/voice emotion detection, wearables	<5% Growing slowly	Gathering data and inferring sentiment from video and/or voice technologies or wearable data collectors.	The most experimental method on the continuum, usage is limited to specific use cases and worker types.

* This is an average adoption estimate of three related components — Digital EX data is more common, but the other two are less common in today's market.

Source: Gartner (November 2023)

Regardless of which data sources are being used, VoE solutions must aggregate and analyze feedback at various cohort and organization levels to highlight sentiment "themes." Some solutions also link these insights to recommended leader actions to remedy common negative sentiment issues or reinforce strengths in a given organizational unit.

Market Direction

Organizations need to be able to sense and respond to ongoing waves of change and their impact on employee attitudes, engagement and experience. As a result, a VoE approach that focuses on increasing continuous listening will be more critical than ever before. Our client inquiries indicate many organizations are actively reviewing their current processes and enabling technologies. The most common drivers for these initiatives are to:

- Connect with workers to understand their perceptions, regardless of where they are working.

- Increase feedback frequency to improve responsiveness to internal and external disruptions.

- Reduce the time between listening and organizational response by improving data collection, analysis and communication process cycle times.

- Improve granularity of feedback and depth of insight while preserving employee anonymity and data privacy.

- Flexibly conduct anonymous and nonanonymous surveys based on the survey type.

- Increase the number and types of feedback to enhance depth and breadth of insights into the overall employee experience.

- Enhance organizational agility by using VoE as a feedback loop to fine-tune talent processes such as onboarding, performance, learning, career development, succession planning, and rewards and recognition. While this objective is still emerging,

- Enable managers to own employee engagement improvement by survey self-management and by getting real-time insights to improve engagement within their teams.

- Empower employees to take responsibility for their own engagement by delivering tailored insights on the drivers and resources needed to enable self-improvement.

- Understand common topics and sentiment around aspects of culture.

- Measure sentiment around DEI through employee feedback and perceptions compared to those of managers, HR and senior leaders.

- Better measure the effectiveness of initiatives initiated in response to VOE outcomes through continuous measurement and monitoring.

These drivers and the coalescing of customer expectations over the past two years have resulted in a VoE market that focuses predominantly on sets of delivered capabilities. These buyer priorities include employee listening surveys, manager enablement, EX insights management and ongoing professional services support.
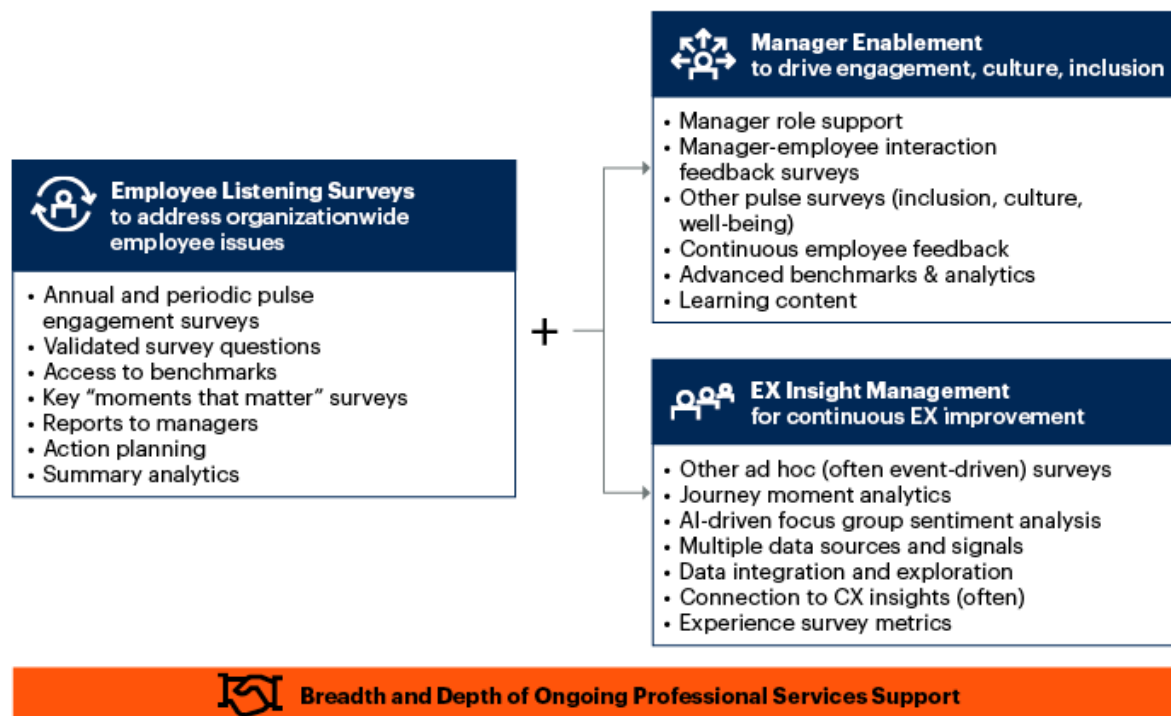
Market Analysis

Buyer Priorities

This market analysis focuses on which VoE capabilities prospective customers see as the highest priority (see Figure 3):

Figure 3: Capability Priorities for VoE Technology Buyers

Capability Priorities for VoE Technology Buyers

Employee Listening Surveys to address organizationwide employee issues
- Annual and periodic pulse engagement surveys
- Validated survey questions
- Access to benchmarks
- Key "moments that matter" surveys
- Reports to managers
- Action planning
- Summary analytics

Manager Enablement to drive engagement, culture, inclusion
- Manager role support
- Manager-employee interaction feedback surveys
- Other pulse surveys (inclusion, culture, well-being)
- Continuous employee feedback
- Advanced benchmarks & analytics
- Learning content

EX Insight Management for continuous EX improvement
- Other ad hoc (often event-driven) surveys
- Journey moment analytics
- AI-driven focus group sentiment analysis
- Multiple data sources and signals
- Data integration and exploration
- Connection to CX insights (often)
- Experience survey metrics

Breadth and Depth of Ongoing Professional Services Support

Source: Gartner
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Gartner

Employee Listening Surveys

Employee listening surveys are a foundational capability desired by any prospective buyer who isn't satisfied with their current solution. While functional depth varies by provider, common features include:

- Ability to conduct annual and periodic pulse engagement, and key "moments that matter" surveys

- A repository of validated survey questions covering these survey types to either use "as is" or as a basis for iteration

- Access to benchmarks (typically by industry, geography, company size and other variables)

- Results reports for managers (typically via a dashboard or online report)

- Summary analytics, often with drill-down to more granular feedback elements

- Consulting support to help interpret survey results

Manager Enablement

Beyond this foundation, client inquiries reveal approximately 65% of organizations prioritize manager enablement to drive employee engagement, culture and inclusion.

Common features of manager enablement include:

- In-depth support of the manager role, often including prescriptive advice and coaching to improve manager performance

- Support of focused pulse surveys for manager-employee interactions (such as feedback on how periodic check-in meetings are being perceived by employees)

- Provision of other pulse surveys (inclusion, well-being, satisfaction)

- Multiple forms of more frequent continuous feedback, including performance, recognition, leadership competencies and 360-degree assessments

- Delivery of additional advanced benchmarks and analytics

- Linkage of recommended actions to related learning content (and sometimes direct provision of that content)

EX Insight Management

A minority (about 25%) focus on EX insight management to deliver continuous EX improvement.

EX insight management features include:

- Support of other ad hoc surveys, often triggered by completion of employee events in HR or other business or operational systems, or corporate communications.

- Delivery of sophisticated analytics to analyze and connect employees' work-related journey moments.

- Data gathering from a broad set of sources and signals, including usage of enterprise applications (what subfunctions are being used, when and how).

- Complex data integration and data exploration tools to ensure clean, accurate and relevant data is driving analysis.

- Correlation of EX to customer experience (CX) metrics and insights (note that provision of this and depth of capability depends on if the vendor originated in the CX market and has expanded to EX).

- Sophisticated EX metrics and insights for managers, HR and digital workplace leaders.

- AI-driven support of online focus groups and conversations, including theme and sentiment analysis. (This feature is less commonly provided than the others in this category, and functional depth will vary, such as the ability to support both synchronous and asynchronous sessions.)

A small percentage (10% or less) try to focus on improving employee listening surveys as well as manager enablement and EX insight management. These tend to be large, complex global firms with sophisticated HR and/or digital workplace practices.

Professional Services Support

Beyond these technology components, many clients are also looking for ongoing professional services support. The breadth and depth of this support varies substantially by vendor, as some choose to provide some (or even all) components via consultancy partners rather than their own staff. Typical support includes:

- Building of the organization's overall VoE measurement strategy

- Developing valid survey questions

- Initial implementation and deployment of the listening technologies

- Administering the surveys (such as tracking completions, reminders, issue resolution)

- Interpreting survey results

- Linking client-developed surveys to recommended actions

- Communicating results and recommended actions to senior leaders

- Reviewing and proposing adjustments to next year's listening plan

Once buyers establish the relative priority of these capabilities, they must then examine the vast array of providers (more than 100 currently offer some VoE capability) to build their "long list" of RFI/RFP recipients. While the solutions profiled in Representative Vendors are commonly considered due to their substantive customer bases, track record and visibility, buyers should also investigate vendors in the following categories, which also offer VoE capabilities.

HCM Suites

These solutions deliver a broad set of functionality to help organizations attract, develop, engage, retain and manage workers (see Magic Quadrant for Cloud HCM Suites for 1,000+ Employee Enterprises for more). Many have entered the VoE space by either acquisition or native development, and their capabilities range from basic surveys to a robust feature set. They should be considered by their current customers, as VoE functionality may be suitable, while also delivering the advantages of integration with the suite's user experience and related functions. However, customers should ask about how employee anonymity is protected for surveys where this is a requirement. Table 2 includes representative HCM suites with VoE capabilities.

Table 2: Representative HCM Suites in the VoE Market

(Enlarged table in Appendix)

Vendor & Product ↓	Product Origin ↓	Estimated No. of "Live" Customers ↓	Typical Deployment (No. of Workers) ↓	Customer Geographic Distribution ↓
ADP StandOut**	Acquired (2017)	250-999	Small, Medium	North America
ADP Voice of the Employee	Native (2022)	Over 5,000	Small	U.S.
Ceridian (Dayforce Engagement)	Native (2022)	250-999	Small, Medium, Large	North America
Darwinbox (VOE Surveys)	Native (2021)	<250	Medium, Large	APAC
Oracle Cloud HCM	Native (2021)	1,000-5,000	Medium, Large	Global
SAP SuccessFactors HXM Suite	Acquired (2018, Qualtrics) Divested (2023), SolEx Partner	1,000-5,000*	Medium, Large*	Global (majority North America)*
UKG Employee Voice	Acquired (2016, Kanjoya)	1,000-5,000	Small, Medium, Large	North America
Workday Peakon Employee Voice**	Acquired (2021, Peakon)	1,000-5,000	Small, Medium, Large	Global (majority EMEA)
Typical deployment (no. of workers): Small (< 1,000) Medium (1,000-5,000) Large (Over 5,000) * Customer base characteristics are based on Qualtrics data as an SAP Solution Extension (SolEx) partner. ** Solution can be sold stand-alone but this occurs in fewer than 5% of deals annually.				

Source: Gartner (November 2023)

Continuous Feedback and Employee Listening Solutions for Smaller Organizations

Another potential source of VoE functionality are solutions that deliver VoE as a part of a broader set of functions, such as continuous performance management, goals/OKR support, recognition, leadership actions and learning. Such solutions tend to target organizations with less than 1,000 employees, or departmental deployments in larger businesses. Representative providers in this category include 15Five and Lattice in North America and Leapsome, which operates predominantly in Europe. Buyers in smaller organizations may appreciate the delivery of continuous listening combined with talent management functionality in a single solution as a cost-effective way to meet their more basic requirements.

Recognition and Reward Systems

Some organizations have invested heavily in recognition and reward programs to improve employee morale, engagement and retention. Over time, major providers of these capabilities have expanded into adjacent areas like performance management and VoE as another way of accomplishing an organizational "sense and respond" feedback loop. Representative vendors include Achievers and Workhuman (which both have a global footprint but adoption is prominently in North America) and Xoxoday Empuls in the APAC region. Buyers in medium to large enterprises that strongly connect employee listening and feedback to recognition and reward program success may find these solutions to be attractive alternatives.

Other Vendors

Finally, several vendors are often mentioned in client inquiries that don't fall neatly into any of the above categories and entered into VoE from adjacent markets:

- Solution providers that support both VoE and other stakeholder listening strategies through an enterprise survey platform and analytics tools, including Medallia and PG Forsta.

- Providers that primarily support alternative means of collecting and analyzing VoE (such as sentiment, conversations and activities), including ActivTrak, Aware, Explorance (Blue and MLY solutions) and ThoughtExchange.

- Leena AI, which first applied its conversational AI-driven platform to integrated HR service management (IHRSM), but has invested in VoE capabilities over the past three years.

- Gallup, which built a substantial customer base in the annual employee engagement measurement market up through the mid-2010s, and is trying to transition to meet the broader requirements of VoE.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Vendor Selection

The VoE market has more than 100 providers offering some form of VoE capability. The seven vendors profiled below are primarily focused on VoE, can sell their solutions stand-alone (although some often bundle VoE with other products), support employee listening surveys, have substantial customer bases, and are commonly referenced in Gartner client inquiries (see Table 3):

Table 3: Representative VoE Vendor Customer Data and Capabilities Support

(Enlarged table in Appendix)

Vendor & Product	HQ Region	Estimated No. of Live Customers	Typical Deployment (No. of Workers)	Customer Geographic Distribution	Manager Enablement	EX Insight Management	Professional Services Focus
Culture Amp Engage	APAC	Over 5,000	Small, Medium	Global (majority NA)	X		
Effectory	Europe	1,000-5,000	Small, Medium, Large	EMEA	X		X
Microsoft Viva	NA	1,000-5,000	Small, Medium, Large	Global	X	X	
Perceptyx People Insights Platform	NA	250-999	Medium, Large	NA, EMEA	X	X	X
Qualtrics XM for People Teams	NA	1,000-5,000	Small, Medium, Large	Global (majority NA)	X	X	
Quantum Workplace	NA	250-999	Small, Medium	NA, EMEA (majority NA)	X		
WTW Engage	Europe	250-999	Medium, Large	Global			X

Typical Deployment (no. of workers): Small (<1,000) Medium (1,000-5,000) Large (Over 5,000)

Source: Gartner (November 2023)

All of these vendors support annual and pulse engagement surveys, as these are an essential prerequisite for VoE point solutions. However, support of other desired VoE data sources does vary (see Table 4):

Table 4: Representative VoE Vendor Data Sources Support

(Enlarged table in Appendix)

Vendor & Product	Thematic Pulse Surveys	Key MTM Surveys	Other Ad Hoc Surveys	Collaboration Tool Sentiment Analysis	AI-Driven Focus Groups	Application Productivity Monitoring & Digital EX Data	Workforce Nudgetech
Culture Amp Engage	X	X	X				X
Effectory	X	X					
Microsoft Viva	X	X	X	X	X	X	X
Perceptyx People Insights Platform	X	X	X	X			X
Qualtrics XM for People Teams	X	X	X	X			
Quantum Workplace	X	X	X				
WTW Engage	X	X	X	X	X		

Note: None of these vendors support the "voice/video emotion detection, wearables" data source, so it is not included in this table.

Source: Gartner (November 2023)

Vendor Profiles

The representative vendors were selected based on Gartner client inquiries, analysis of a vendor survey, and vendor briefing materials.

Culture Amp

Overview: Culture Amp was one of the first vendors to deliver pulse employee engagement surveys, thus helping drive market evolution from engagement measurement to VoE. In 2019, the vendor acquired Zugata to add employee performance management to its portfolio.

Recent Innovations (July 2022 Through June 2023)

- Launched People Analytics, including Retention Insights to deliver early turnover warning signals in a comprehensive leader dashboard

- Enhanced linkage of performance ratings with engagement results to better understand engagement focus areas and opportunities for high performers

- Improved text analytics functionality to improve accuracy in sentiment and topic tagging

- Expanded the number of engagement theme topics from 18 to 28 to make it easier to analyze and action engagement themes

Near-Term Innovation Roadmap (July 2023 Through June 2024)

- Adding more predefined metrics use cases to People Analytics to bring more insights, guidance and action

- Leveraging AI (powered by Google Cloud Vertex AI) in comment analysis to help HR and leaders find richer meaning and derive themes

- Introducing actions for employees, managers and leaders based on Culture Amp platform usage and data integration to core HR

- Enhancing its public API and expanding its HCM suite partner ecosystem

Related Capabilities: Employee performance management, employee well-being, recognition and rewards, leadership skills building, people analytics

Effectory

Overview: Effectory positions its offering as an employee feedback platform that streamlines the entire employee listening process. The firm began by providing annual employee engagement measurement for European headquartered multinationals, and has since expanded to deliver most direct pulse survey types in 60 languages. With offices in Amsterdam and Munich, Effectory has maintained its sole focus on VoE, with almost all of its revenue coming from Europe. Its partner ecosystem is still emerging, as the vast majority of implementations are completed by internal resources.

Recent Innovations (July 2022 Through June 2023):

- Additional other pulse surveys, including an Environmental, Social and Governance (ESG) Scan and a Hybrid Working Scan

- Added onboarding and exit to Moments That Matter surveys

- Established partnership with an organizational mapping solution (Ingentis) to strengthen analysis and action planning

- Developed integrations to ERP and core HR solutions, including AFAS Software, Personio and SAP SuccessFactors

Near-Term Innovation Roadmap (July 2023 Through June 2024)

- Integrating AI to connect survey analysis results to recommended learning actions

Related Capabilities: Employee well-being, employer of choice programs/certifications

Microsoft Viva

Overview: Glint (founded in 2013) gained visibility in 2015 as an early pulse engagement survey provider. Acquired in 2018 by LinkedIn, Microsoft made Glint a module of its Viva suite in April 2023. Viva VoE-related modules include:

- Microsoft Viva Glint, which supports direct surveys, analysis and action planning

- Microsoft Viva Insights, which provides visibility into workplace activities, communication behaviors and collaboration patterns

- Microsoft Viva Pulse, which enables managers and leaders to get feedback and take action using brief team and project-based surveys

Recent Innovations (July 2022 Through June 2023):

- Glint became generally available to Microsoft Viva customers, branded as Viva Glint.

- Further enhancements included Team Conversations, Manager Concierge and improved LinkedIn Learning integration.

- Viva Insights offered UX improvements for analysts, meeting-focused productivity aids (meeting surveys, meeting category insights, prep time nudges), templates for meeting planning, effectiveness and audit reports, and improved manager and leader insights.

- Viva Pulse became generally available in July 2023.

Near-Term Innovation Roadmap (July 2023 Through June 2024):

- Data and user experience integrations across Viva Glint, Viva Pulse and Viva Insights

- Incorporating Copilot (new generative AI capabilities) into all three modules

- Embedding skills intelligence across the suite

- Delivery of multiattribute reports

Related Capabilities: Employee communications, employee productivity monitoring, OKR/goal management, learning and development, collaboration and knowledge management

Perceptyx

Overview: Perceptyx was founded in 2003 with a focus on annual employee engagement for complex global organizations. It has navigated the transition to VoE via native development and multiple acquisitions over the past five years, including CultureIQ, Waggl, Cultivate and Humu.

Recent Innovations (July 2022 Through June 2023):

- Improved accuracy of sentiment analysis and the launch of intent modeling (captures specific framing and emphasis of comments, and identifies emotional and action indicators of feedback)

- Delivery of standard Workday/Oracle/SAP connectors so that employee data within Perceptyx is synced in real time

- Introduction of a Microsoft Teams Bot to enable employees to interact easily with Perceptyx surveys and reports through Teams

- Launch of Cultivate Intelligent Coaching to analyze manager behavior and deliver personalized coaching, with integration to the Cultivate 360 Feedback tool

Near-Term Innovation Roadmap (July 2023 Through June 2024):

- Integrated homepage providing insights, recommendations and resources personalized to each user's role

- A new bot for Slack

- Analytics Studio for people analytics professionals to perform advanced analytics on Perceptyx data

- Enabling customers to process open-ended feedback collected outside of Perceptyx using the vendor's proprietary NLP models

- An AI Insights Engine to capture and analyze employee data and build tailored action recommendations, coaching and nudges

Related Capabilities: Employee well-being, manager enablement

Qualtrics

Overview: Qualtrics was founded in 2002 to provide data-gathering tools for academic researchers and evolved into a multiproduct company that first gained visibility in CX management. The company has invested in VoE for more than 10 years, which accounts for an estimated 20%+ of its annual revenue.

Recent Innovations (July 2022 Through June 2023):

- Manager Assist, which enables people managers to listen, understand and act on team feedback in real time

- Engagement Headlines, which helps managers understand their results in "story" form

- Innovations to help survey administrators manage their programs more quickly and efficiently, including "set it and forget it" ongoing pulses

- Launches of Spotlight Insights, CrossXM, EX benchmarks and Employee XM Discover with comprehensive EX topic models

Near-Term Innovation Roadmap (July 2023 Through June 2024)

- Enhancements to Manager Assist to provide a 360-degree view of experience, behavioral and operational data, and launch of a GenAI-based "Manager Coach" that will summarize results and drive personalized action plans

- Expansion of experience listening and analytics to include application behavioral, operational and experiential data sources and predictive insights

- Incorporation of passive listening and analytics outside of traditional survey data sources to power continuous insights, and root cause analysis across the organization

Related Capabilities: Employee well-being, voice of the customer

Quantum Workplace

Overview: Quantum Workplace was founded in 2002 to provide software-based organizational assessments. It has grown from there to provide employee engagement, VoE and performance management, and leads data collection for the U.S.-recognized Best Places to Work program.

Recent Innovations (July 2022 Through June 2023)

- Investment in building foundational GenAI components, resulting in Smart Summaries, which leverage large language models (LLMs) to review comment sections and generate a summary

- Extending action planning to help teams make progress survey over survey on any survey type

- UX improvements in reporting and action plan follow-ups, resulting in increased visibility of actions taken throughout the organization

Near-Term Innovation Roadmap (July 2023 Through June 2024)

- Expansion of GenAI to generate summaries of survey findings and help users write better quality feedback and goals

- Comment Sentiment & Theming AI models updated to leverage GenAI

- Delivery of an Action Idea Generator which uses GenAI to build AI-driven action plans

- Using performance activity to predict engagement and flight risk

- Improving Action Planning to include organizationwide cascading of actions

- Automation of Succession Plan Reporting for designated users and roles

Related Capabilities: Employee performance management, employer of choice programs/certifications, recognition and rewards, talent reviews, succession planning

WTW

Overview: WTW is a large global consultancy that has long been a mainstay in annual employee engagement measurement, with a focus on serving large complex global organizations. It has evolved over time into VoE, with Engage now supporting the most popular VoE data sources.

Recent Innovations (July 2022 Through June 2023):

- Text Analytics, an AI/NLP-based theme and sentiment analysis of employee comments in more than 80 languages. The solution analyzes comment fragments to improve precision and produces both high-level themes and multiple subthemes in natural language.

- Engage Coach, which provides managers with suggested actions and related content to address issues tied to their survey findings, enabling them to drive action more quickly.

Near-Term Innovation Roadmap (July 2023 Through June 2024):

- Expansion of Text Analytics to identify open-ended comments for any survey question and differences in comment themes across organizational subgroups, and deliver specialized Microsoft PowerPoint slides showing multiple organizational groups over time

- Upgrading Engage Coach to include AI-generated manager action suggestions, improve action plan sharing and export, link recommendations to client-specific content, and integrate with performance management systems

- Enhancements to improve efficiency and ease of use throughout the employee listening process, including development of APIs to leading HCM suites and autotriggering individual invites to unique survey content

Related Capabilities: Employee well-being

Market Recommendations

HR technology leaders supporting employee engagement and experience transformation should:

- Deliver deeper, more meaningful engagement and experience insights faster by adjusting VoE strategies (including choice of metrics and measurement intervals).

- Increase the chances of success by allocating resources to support listening activities and soliciting buy-in from stakeholders throughout the business on how responses should be organized. In some organizations, executive leaders of business functions and managers will be ready to take a very active role in continuous listening.

- Expedite vendor selection by prioritizing differentiating capabilities (listening professional services, manager enablement, EX insight management), since basic employee listening features are expected in today's market.

- Set realistic expectations with stakeholders upfront by clearly communicating that no one solution will support all activities. Narrow the field from many possible alternatives by prioritizing the data sources and collection/measurement methods that best fit the organization.

- Rightsize your approach to VoE by determining what level of investment you can make and what advanced analytics and data science skills will be needed to aggregate disparate data sources. This will likely require some combination of hiring, upskilling and/or consulting support.

- Select the finalist vendors by evaluating how well they automate the delivery of insights and advice to facilitators, managers or employees. Investigate the algorithms each provider uses to personalize advice for different stakeholders as well as how various levels of manager can be equipped to drive VoE initiatives.

- Adjust to changing organizational and employee needs by piloting innovative enabling technologies and by being prepared to swap out technology components for more mature alternatives.

- Make VoE initiatives actionable by equipping stakeholders with insights to support internal initiatives, such as individual career development and recommended actions that can be delivered to broader employee segments.

Document Revision History

Market Guide for Voice of the Employee Solutions - 18 October 2022

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Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

2022 Strategic Roadmap for HCM Technology Investments

Use-Case Prism: Artificial Intelligence for HR

Benchmark Your Employee Experience Function

Innovation Insight for Digitally Enabled Diversity, Equity and Inclusion

Getting Value From Measuring Employee Experience, Productivity and Well-Being

Market Guide for DEX Tools

Apply Gartner's EX-Ready Model to Optimize Employee Experience Technology Initiatives

Table 1: VoE Data Source Details

Data Source ↓	Adoption/Direction ↓	Description ↓	Uses/Benefits ↓
Annual engagement surveys	80%+ Slowly Shrinking	Gather data to analyze the fundamental drivers of employee engagement (e.g., relationship with supervisor, trust in senior leaders, tools/training to perform in the current job, sufficient career opportunities, adequacy of compensation and benefits).	Provides a regular baseline for analysis of changes by year for various workforce segments (e.g., business unit, region, department, manager).
Periodic pulse engagement surveys	60%+ Growing	Supplemental short question sets (typically 5-6) aligned to the annual survey typically delivered to a random sample of the total employee population.	Shortens the annual survey while preserving statistical validity of data and reducing survey fatigue.
Thematic pulse surveys	50%+ Growing	Additional short question sets (on topics such as inclusion, culture, well-being, satisfaction) delivered to a random sample or a specified employee segment.	Gathers sentiment on broader employee experience drivers in a statistically valid fashion while reducing survey fatigue.

Data Source ↓	Adoption/Direction ↓	Description ↓	Uses/Benefits ↓
Key "moments that matter" surveys	45%+ Growing	Short surveys aligned to or triggered by employee life cycle and personal events such as onboarding, return from leave, transition to a new role, exiting the organization.	Collects and analyzes feedback to improve the employee experience at critical moments of the employee life cycle.
Other ad hoc surveys	35% Growing	Short surveys typically sent after organizational communications or announcements, or following an interaction with an employee-facing service or system.	Provides quick feedback on effectiveness of communications. Enables measurement of employee satisfaction with a service or technology.
Collaboration tool data sentiment analysis	15% Growing	Gathers data from collaboration tools' users to analyze usage patterns and ultimately infer perceptions and sentiment. Sometimes includes analysis of text in public, or even private, conversations.	Doesn't require active participation or response from employees. Based on what employees do versus what they say.
AI-driven focus group/conversational tools	10% Growing	Derives more in-depth insights on a specific topic based on either a participant's direct feedback or a participant's reaction to other participant feedback.	Enables a deeper dive into a topic. Synchronous focus groups provide real-time feedback and synthesis of themes. Asynchronous tools enable topics to be left "open" for a specific time for participants to weigh in at their convenience.

Data Source ↓	Adoption/Direction ↓	Description ↓	Uses/Benefits ↓
Application, productivity monitoring and digital EX data	10% Growing slowly*	Analyzes usage data from tools used for core work assignments and derives sentiment based on how the tools are used by various worker types. Most common in organizations with an IT-centric or productivity-focused view of VoE.	Gathers data without the need for direct employee feedback. Can drive in-depth productivity analysis. Can provide feedback to drive improvements in core work technologies.
Workforce nudgetech data	<5% Growing slowly	A type of AI-enabled choice architecture designed to elicit behaviors that accelerate targeted positive outcomes at the individual, team and/or org. level. Products are starting to take data from employee and manager responses to nudges as inputs to further analysis.	Can help organizations leverage sentiment data from nudges to further "nudge" employees and managers toward recommended actions.
Video/voice emotion detection, wearables	<5% Growing slowly	Gathering data and inferring sentiment from video and/or voice technologies or wearable data collectors.	The most experimental method on the continuum, usage is limited to specific use cases and worker types.
* This is an average adoption estimate of three related components — Digital EX data is more common, but the other two are less common in today's market.			

Source: Gartner (November 2023)

Table 2: Representative HCM Suites in the VoE Market

Vendor & Product	Product Origin	Estimated No. of "Live" Customers	Typical Deployment (No. of Workers)	Customer Geographic Distribution
ADP StandOut**	Acquired (2017)	250-999	Small, Medium	North America
ADP Voice of the Employee	Native (2022)	Over 5,000	Small	U.S.
Ceridian (Dayforce Engagement)	Native (2022)	250-999	Small, Medium, Large	North America
Darwinbox (VOE Surveys)	Native (2021)	<250	Medium, Large	APAC
Oracle Cloud HCM	Native (2021)	1,000-5,000	Medium, Large	Global
SAP SuccessFactors HXM Suite	Acquired (2018, Qualtrics) Divested (2023), SolEx Partner	1,000-5,000*	Medium, Large*	Global (majority North America)*
UKG Employee Voice	Acquired (2016, Kanjoya)	1,000-5,000	Small, Medium, Large	North America
Workday Peakon Employee Voice**	Acquired (2021, Peakon)	1,000-5,000	Small, Medium, Large	Global (majority EMEA)

Typical deployment (no. of workers): Small (< 1,000) Medium (1,000-5,000) Large (Over 5,000)
* Customer base characteristics are based on Qualtrics data as an SAP Solution Extension (SolEx) partner.
** Solution can be sold stand-alone but this occurs in fewer than 5% of deals annually.

Table 3: Representative VoE Vendor Customer Data and Capabilities Support

Vendor & Product ↓	HQ Region ↓	Estimated No. of Live Customers ↓	Typical Deployment (No. of Workers) ↓	Customer Geographic Distribution ↓	Manager Enablement ↓	EX Insight Management ↓	Professional Services Focus ↓
Culture Amp Engage	APAC	Over 5,000	Small, Medium	Global (majority NA)	X		
Effectory	Europe	1,000-5,000	Small, Medium, Large	EMEA	X		X
Microsoft Viva	NA	1,000-5,000	Small, Medium, Large	Global	X	X	
Perceptyx People Insights Platform	NA	250-999	Medium, Large	NA, EMEA	X	X	X
Qualtrics XM for People Teams	NA	1,000-5,000	Small, Medium, Large	Global (majority NA)	X	X	
Quantum Workplace	NA	250-999	Small, Medium	NA, EMEA (majority NA)	X		
WTW Engage	Europe	250-999	Medium, Large	Global			X
Typical Deployment (no. of workers): Small (<1,000) Medium (1,000-5,000) Large (Over 5,000)							

Source: Gartner (November 2023)

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Table 4: Representative VoE Vendor Data Sources Support

Vendor & Product	Thematic Pulse Surveys	Key MTM Surveys	Other Ad Hoc Surveys	Collaboration Tool Sentiment Analysis	AI-Driven Focus Groups	Application Productivity Monitoring & Digital EX Data	Workforce Nudgetech
Culture Amp Engage	X	X	X				X
Effectory	X	X					
Microsoft Viva	X	X	X	X	X	X	X
Perceptyx People Insights Platform	X	X	X	X			X
Qualtrics XM for People Teams	X	X	X	X			
Quantum Workplace	X	X	X				
WTW Engage	X	X	X	X	X		
Note: None of these vendors support the "voice/video emotion detection, wearables" data source, so it is not included in this table.							

Source: Gartner (November 2023)