Magic Quadrant for Voice of the Customer Platforms

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Organizations use VoC platforms to manage the customer experience through a deep understanding of customer needs and perceptions. This research helps you identify vendors whose VoC platforms are best equipped to help them achieve their CX and business objectives.

Market Definition/Description

Gartner defines a voice of the customer (VoC) platform as one that integrates feedback collection, analysis and action into a single interconnected platform that helps understand and improve the customer experience. Sources of feedback extend beyond direct surveying to include other, more indirect and inferred sources.

VoC platforms enable leaders responsible for functions such as customer service, marketing, or sales to better manage the customer experience (CX) through a deep understanding of customer needs, motivations, goals and behaviors. The resulting insights trigger recommendations and actions across the enterprise.

Common use cases include:

- **VoC data sources are surveys only:** This scenario involves independently running annual or regular customer satisfaction surveys, with little to no collection of indirect or inferred feedback from customers. Data is often not shared across the organization.

- **VoC data sources include indirect feedback:** This scenario involves the integration of direct customer feedback with indirect feedback, such as text analytics, social media analytics and speech analytics. Data is centralized/shared and analyzed more holistically.

- **VoC data sources extend to inferred feedback:** This scenario involves the integration of direct and indirect customer feedback to include inferred data. Data may include digital analytics, customer journey analytics and operations data to get a more holistic view of the customer.

- **VoC data is disseminated and embedded:** This scenario centers on disseminating relevant and real-time data via workflows, reports and dashboards while embedding this VoC data into frequently used applications such as CRMs.

- **VoC insights impact business outcomes:** This scenario focuses on the ability to quantify resulting actions from VoC insights with their impact on CX and business outcomes.

Mandatory Features

The mandatory features of a VoC platform are:

- Data collection — The ability to collect all three types of VoC data:

  - Direct feedback — Feedback that customers intend to provide directly to the organization, either when asked to do so or when motivated by their experience. This feedback typically takes the form of a survey, with responses gathered through multiple channels, such as email, websites, paper, SMS, voice, video, a mobile application, in-product, online community and integrated voice/video channels (live panels).

  - Indirect feedback — Feedback derived from instances when the customer talks about an organization without specifically intending to provide feedback to the organization. This feedback includes insights gathered from review sites, community sites, social media apps and customer care interactions via phone, video, email and chat.

  - Inferred feedback — Operational and behavioral data associated with a customer experience (CX) or customer journey, such as a website's clickstream data, product analytics, telemetry data, mobile app location data or contact center operational data.

- Analysis and insight — The ability to:

  - Apply generative AI to auto-tag topics and sentiment.

  - Analyze and generate insights from structured and unstructured feedback datasets to generate a variety of custom visualizations and reporting.

- Apply a variety of statistical analysis techniques (regression, conjoint, etc).

- Generate reports that include user-defined dashboards as well as traditional word clouds, AI-generated journey maps and AI predictive and prescriptive models.

- Action — The ability to automatically or manually act upon generated insights through the use of AI-based recommendations and automation, as well as traditional alerts, workflows and case assignments. Actions may encompass a combination of root cause problem solving (outer loop), closed-loop triggering of an employee intervention (inner loop) and automated triggering of other applications with no human intervention (auto-loop).

Common Features

Common features of a VoC platform include:

- Source options extend to human interactions including interviews, panels, forums and focus groups. They extend to digital interactions through in-app surveys and polls, review sites, social media, customer interaction exchanges, websites, applications and online communities. Ability to infer feedback comes from purchase behaviors and conversions/transactions, location data, service delivery data, usage and adoption data, process and channel performance data, and service/support and payment data.

- Ability to aggregate and link direct and indirect VoC data to associated inferred operational and financial data includes site/app engagement, call wait times, interactive voice response (IVR) pathways and revenue under dispute. Customizable and industry-tailored dashboards, workflows, relevant operational integrations supporting specialist services, benchmarking capabilities and diagnostic tools using AI-driven predictive and prescriptive models are also common.

- Automated closed-loop feedback with integration into other business systems allows for actions to be triggered directly in a third-party system (e.g., opening a service ticket) and monitoring results. Workflows must encompass a combination of root cause identification with automated or human-assisted resolution.

- Ability to scale with configuration options based on the size of the enterprise will accommodate different levels of organizational complexity, number of users and the range of participating departments.

- Ability to configure or customize to meet the needs of a B2C, B2B or B2B2C organization's specific go-to-market approaches.

- Ability to collect operational, behavioral and engagement data from third-party platforms managed by resellers, partners or third-party marketplaces.

- Incorporation of data from other market research methodologies such as focus groups, A/B testing, session replays, video diaries, user testing, expert interviews and ethnographic studies.

- Sentiment analysis to enable recommendations for the use of specific terminology and verbiage during a conversation.

- Customer journey analytics to connect and visualize operational data, displayable through journey maps, for example to analyze the way customers use available channels to interact.

- Analytics and next best actions recommended by generative AI based on customer feedback data.

- Association of direct, indirect and inferred VoC data to align the specific service delivered at a customer journey touchpoint with interaction-level customer feedback to predict the service required to deliver high customer satisfaction.

Magic Quadrant

Figure 1: Magic Quadrant for Voice of the Customer Platforms

CHALLENGERS   LEADERS

● Qualtrics

● Medallia

● Sprinklr

● Press Ganey Forsta
● InMoment

Alchemer ●

Verint ●
Concentrix ●
Pisano ●

ABILITY TO EXECUTE

SMG ●

XEBO.ai ●
QuestionPro ●

NICHE PLAYERS   VISIONARIES

COMPLETENESS OF VISION   As of March 2025   © Gartner, Inc

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Vendor Strengths and Cautions

Alchemer

Alchemer is a Challenger in this Magic Quadrant, demonstrating good customer experience but a smaller geographic footprint compared to leading voice of the customer (VoC) vendors. The VoC platform consists of the Alchemer Survey, Workflow, Digital and Pulse solutions, offering a range of data collection channels, close-the-loop capabilities, digital and text analytics, along with integration capabilities with third-party applications. The solution appeals to customers who want a capability that doesn't have a steep learning curve. Alchemer has a presence in all regions and serves organizations of all sizes, but most

of its customers are small enterprises in North America. Its customers span more than 18 industries with a concentration in education, business and consumer services, and nonprofit and membership organizations. Some of the areas in which Alchemer is investing include omnichannel feedback collection, customer experience for implementing and using its platform, and generative AI (GenAI) capabilities for insight analysis.

Strengths

- **Easy to use:** Gartner Peer Insights users comment that the platform is easy and intuitive to learn and use. This observation is reflected in its shorter-than-average time to onboard compared to other vendors and its reduced need for IT resources to implement.

- **Strong customer success management:** Alchemer's customer retention strategy is supported by a strong customer success management program. Customers have dedicated customer success managers who act as thought partners, collaborating with users on strategic plans and findings, which can reduce the time or effort needed for customers to achieve value.

- **Free proofs of concept (POCs):** The company offers free POCs, guided by a solutions engineer. During the POC, the customer can integrate the platform with its business systems to get the full experience of the solution.

Cautions

- **Limited analytics and AI:** Alchemer has introduced foundational generative AI capabilities to summarize feedback and classify themes, as well as an assistant for users to query feedback data. But its AI capabilities aren't as extensive as other vendors who offer segmentation, recommended actions, impact analysis and customized responses.

- **No industry events and digital communities:** Unlike other vendors, Alchemer doesn't have a digital customer community, nor does it host an industry event. The lack of communal spaces reduces the opportunities its customers have to learn from other Alchemer users and share best practices.

- **Lack of robust partner ecosystem:** Compared to Leaders in the market, Alchemer doesn't have a structured partner program with systems integrators, agencies and other execution partners, which could affect large enterprise users especially.

Concentrix

Concentrix is a Niche Player in this Magic Quadrant due to its lack of an external services ecosystem and shortcomings in GenAI innovation for ConcentrixCX, its VoC solution. ConcentrixCX offers multichannel support for direct feedback, as well as indirect feedback (e.g., transactions, ticketing, demographics, financials) and inferred feedback ingestion for both customers and employees. ConcentrixCX supports native journey dashboarding, incorporating all three feedback types to help users understand "moments that matter" by showing changes in metrics across the customer journey. It is best suited for large enterprises that require CX services — not just a software platform — to design, build and run VoC programs. Its clients span nine industries, with a concentration in banking, financial services and insurance. Most of its presence is in North America, EMEA and APAC. Its platform investments include AI capabilities for feedback collection, such as conversational surveys powered by GenAI, as well as increasing self-service capabilities in survey design and reporting results.

Strengths

- **Effective marketing execution:** Concentrix positions itself as an end-to-end partner on CX, rather than solely a VoC software platform, with unique capabilities delivered by in-house professional services teams to design, build and run VoC programs for customers at all levels of maturity.

- **Strong overall viability:** Concentrix is a growing, publicly traded global company with $10 billion in revenue. It is one of the largest vendors in this Magic Quadrant by both revenue and employee count — stability indicators that raise customer confidence.

- **Good vertical/industry strategy:** Concentrix offers out-of-the-box taxonomies and category models for specific industries, like financial services, shortening time to value. Customers also have the flexibility to build their own custom models.

Cautions

- **Lack of robust partner ecosystem:** Concentrix has co-selling partners, but lacks a formal ecosystem of postsale services partner and systems integrators with whom larger enterprises may already have a relationship. One hundred percent of Concentrix customers rely on its in-house services, supporting the entire design, build and operations of the VoC program.

- **Underdeveloped customer success program:** An area that needs improvement is the development of a more robust set of self-service resources, such as an online customer

community and a dedicated, ongoing customer success program. Customers must rely on traditional release notes, product documentation and webinars, and pay for most services.

- **Limited marketing strategy:** While Concentrix targets enterprises ranging from $1 billion to $10 billion in revenue in top segments like financial services, it lacks a clear articulation of the business outcomes for those target buyers. It instead relies on traditional industry-segment focus and not persona-driven segments and outcomes. As a result, early-stage buyers may struggle to understand what differentiates Concentrix.

InMoment

InMoment is a Leader in this Magic Quadrant due to its broad industry coverage and platform solutions. The Experience Improvement (XI) Platform offers organizations customer insights through a range of VoC data, analytics and reporting capabilities, appealing to customers of varying levels of VoC program maturity and CX needs. InMoment provides support in all regions, though primarily in North America, and most customers tend to be midsize to large enterprises. The company supports 17 industries; most of its clients are in travel and hospitality, financial service, retail and healthcare. InMoment's roadmap includes investing in improving its platform adoption speed through prebuilt templates by role, implementing additional natural language processing data analysis output capabilities, and providing contextually aware AI summaries.

Strengths

- **Good AI-derived insights:** XI has strong capabilities using AI to analyze datasets and various formats, enabling customers to predict customer behavior or make prescriptive recommendations. The resulting dashboards include robust features that allow modeling impact on CX metrics and good filtering capabilities.

- **Short onboarding:** Compared to other vendors, the time for InMoment to onboard its customers is lower than most, with out-of-the-box templates and solutions making the process more efficient.

- **Robust geographic strategy:** InMoment tailors its strategic approach to support organizations based on geographic maturity and local requirements or preferences. The company balances its global best practice recommendations with regional nuances in CX adoption, regulatory requirements and business culture, creating a market-specific delivery strategy for organizations.

- **Underdeveloped customer success program:** Its customer success program is not as extensive as other VoC vendors as it does not include as broad a structured framework to drive engagement and maturity within organizations.

- **High platform pricing:** During inquiry, some clients have shared that InMoment's platform pricing is high compared to other VoC vendors. Potential buyers should balance business needs with total cost of ownership when evaluating InMoment's platform to ensure ROI is achieved.

- **Lagging self-service anomaly detection:** While InMoment offers alerts based on customer feedback anomalies, its self-service anomaly-detection ability lags that of other vendors. Prospects interested in being able to quickly identify emerging customer problems and improve their responsiveness should consider a vendor's maturity with this capability.

Medallia

Medallia is a Leader in this Magic Quadrant due to its broad and mature core offering. Its VoC solution is Medallia Experience Cloud (MEC), which provides extensive capabilities, including complex analytical tools. Most of Medallia's customers are large enterprises, with the remainder equally distributed between small and medium-size midsize businesses. Medallia is well-suited for midsize to large enterprises with a global presence, complex organizational structure and the need to integrate multiple forms of VoC data streams into a unified platform for analysis and reporting. The company has a presence in all geographic regions, with a majority focus in North America. Medallia has clients in all industries; most of its customers are in travel and hospitality, financial services, and retail. Medallia's future investment roadmap includes administrative controls for AI, Root Cause Assist, expanding the existing Smart Response capability to produce automated feedback responses across additional channels, and a real-time mobile Digital Experience Score.

Strengths

- **Robust product offering:** The MEC offers a robust platform for collecting, analyzing, actioning and reporting a full range of VoC, CX and customer insight data. Medallia is innovating AI and GenAI capabilities in three areas: VoC data analysis, automated action and faster identification of customer issues.

- **Clear understanding of client needs:** Medallia maintains a strong and clear understanding of client needs, technology trends, customer patterns and the best impact

of AI as it develops, maintains and deploys its offering across a variety of B2C, B2B and B2B2C industry implementations.

- **Strong geographic strategy:** Medallia has a global offering with a multicountry presence that surpasses most other vendors. It has a large, global network of implementation partners. Its user interface and documentation is available in many languages, especially compared to other VoC vendors.

Cautions

- **Pricing concerns:** Concerns clients express about Medallia during inquiry and on Gartner Peer Insights include the price of the platform and the price of professional services compared to value received. Prospective buyers should understand the true business requirements of Medallia's platform and professional services, and evaluate them against their customer needs to ensure a successful ROI.

- **Long onboarding time:** Medallia's average time to onboard and implement its solution for midsize to large enterprise customers is 8 to 24 weeks, which is longer than most other vendors evaluated. Prospects should validate whether this meets their ramp-up time requirements.

- **Low customer retention rate:** Medallia's customer retention rate has improved, but its retention remains below average compared to other vendors. Potential clients should request updated client experience efforts and results as part of the evaluation process.

Pisano

Pisano is a Niche Player in this Magic Quadrant because of its limited geographic coverage and fewer innovations compared to Leaders. Its Total Experience Management, VoC and VoE platform provides customer feedback, analysis and reporting capabilities, appealing to customers who are early adopters of a VoC program. The majority of its presence is in EMEA, with limited coverage in other regions. Midsize and large enterprises are its primary customers. The company has customers in 10 industries with a concentration in retail, financial services, transportation, travel and hospitality, and insurance. Pisano's roadmap includes investments in Leo, its GenAI XM assistant, customer journey analytics, data migration efficiencies, improved workflows, improvements in AI-based text analytics, closing the loop and analysis.

Strengths

- **Helpful AI assistant:** Pisano's solution has an AI assistant feature, called Leo, that provides platform users with recommendations for survey, dashboard and report design, alongside summaries and trends of VoC feedback.

- **Easy to use:** Customer feedback on Gartner Peer Insights indicates that Pisano's solution is simple, intuitive and easy to use, with a user-friendly interface. Our research shows that the time to onboard is one of the lowest among VoC vendors.

- **Strong customer retention:** Pisano's self-reported customer retention rate is high compared to other VoC vendors that were evaluated. Retention efforts include events and forums in EMEA, where industry experts share thought leadership to help improve CX outcomes.

Cautions

- **Lacks strong professional services:** Pisano's professional services offering is not as robust as what other VoC vendors provide, including, for example, a lack of differentiation of services by maturity of needs. Customers should evaluate platform professional services as part of the vendor evaluation process.

- **Lagging innovation:** Pisano solutions introduced this past year were not as innovative as leading vendors', and they tended to be offerings commonly seen with other vendors. Lagging innovation limits Pisano's ability to differentiate its product or service offerings or demonstrate unique capabilities in the market.

- **No hands on POCs:** Unlike other vendors in the market, Pisano does not offer typical POCs, where prospective customers have trial access to VoC platform capabilities to test technology integrations or evaluate product features. Instead, Pisano offers a "showcase session," which is a presentation and tailored demo, and then buyers have the ability to access this sandbox demo environment.

Press Ganey Forsta

Press Ganey Forsta is a Leader in this Magic Quadrant due to its traction in the VoC platform market, making it one of the largest vendors, with a very high self-reported retention rate. Its product is the Human Experience Platform, with additional modules for incorporating research focus groups and local experience reviews and feedback. Due to its robust support for global privacy regulations, the solution is well-suited for mature VoC programs within regulated industries. The company primarily targets large enterprises, extending into

midsize businesses. Most of Press Ganey Forsta's presence is in North America, followed by EMEA and APAC. Selling across industries, it has deep penetration in healthcare and good representation in financial services, insurance, retail and business services. Press Ganey Forsta is making investments in the platform's analysis and visualization capabilities, in addition to the application of AI for improved respondent targeting, feedback and interaction.

Strengths

- **Good product enterprise support:** The platform can support complex organizational structures, with the ability to assign individual users to multiple roles across multiple hierarchies, which can be managed within the platform or through integrations with a human resources management solution.

- **Regulated industry expertise:** Although the company has customers across vertical industries, it has expressly focused on, and has traction with regulated industries. To boost that focus, the company has built out its support for meeting privacy regulations across regions, including China.

- **Value-based sales strategy:** To help potential buyers make their decisions, Press Ganey Forsta uses a team-based selling approach, incorporating discovery sessions and tools that help the sponsor center the solution and produce a justification based on their intended outcomes. For existing customers, the vendor provides trial access to modules in order to help evolve programs.

Cautions

- **Limited partner strategy:** Press Ganey Forsta has partnerships in place that contribute to the company's sales growth plans but do not extend to service providers. Reliance on its own service teams could limit its ability to address new customers, especially as the company continues to expand its market and global presence.

- **Limited geographic strategy:** Though the company has presence in Europe and Asia, the bulk of its resources, including customer success, are based in North America. With a strong focus on the services as a differentiator, prospective buyers in other regions should validate the company's ability to deliver.

- **Lack of differentiated AI innovation roadmap:** Press Ganey Forsta has a number of planned innovations for AI in its roadmap, but its plans are largely on par with, and not

differentiated from the other Leaders. Potential buyers should request vendors' current innovation roadmap to ensure it meets their future needs.

Qualtrics

Qualtrics is a Leader in this Magic Quadrant because of its platform innovations and depth of industry-specific resources. The company's XM for Customer Experience Suite, best suited for large or complex organizations, includes three product modules: Frontline Digital, Care and Locations, which are sold as a single suite. Qualtrics' customers are mostly midsize or large enterprises. Qualtrics is present in all regions, with a concentration in North America and EMEA. The company supports clients in 14 industries, primarily in education, business or consumer services, financial services, healthcare, and technology. Qualtrics' investments include GenAI capabilities, such as dynamic survey intercepts and suggested response plans, as well as the introduction of a CX maturity framework.

Strengths

- **Robust product offering:** Qualtrics brought notable new features to market in the past 12 months (e.g., Response Clarity is an AI-generated survey intercept, Digital Assist is a purpose-built app offering centralized insights from digital surfaces). These features will make surveys more dynamic and engaging.

- **Strong vertical/industry focus:** "Customer units" specialize in verticals such as financial services, healthcare and the public sector, with dedicated pre- and postsales resources. Qualtrics is also building out a similar model for "location-based" businesses in verticals like retail, travel and hospitality.

- **Good market responsiveness:** Qualtrics regularly launches new AI features, like GenAI-based social review responses, while also simplifying its offering through a single platform suite with interaction-based pricing and unlimited users. Relative to other vendors, these are Qualtrics' strongest evaluation criteria items.

Cautions

- **High total cost of ownership:** Gartner Peer Insights reviews and client inquiry highlight comparatively high pricing, an issue exacerbated by the migration to interaction-based pricing. Potential buyers should assess the maturity of their VoC program to understand whether the capabilities offered by Qualtrics can be fully utilized to drive a sufficient ROI.

- **Limited AI accessibility:** While Qualtrics sees its cloud-based, multitenant platform and investment in AI as differentiators, other vendors are making the same investments. Despite Qualtrics' aggressive AI roadmap, client inquiry shows the company has staggered the availability of AI features to limited cohorts of customers, making innovations harder for all customers to readily access.

- **Inconsistency with customer success and support:** An area for improvement includes ensuring continuity and consistency in after-sale customer success and support. Qualtrics' resources have been viewed favorably by clients during inquiries, but the company made support model changes in the past year that included personnel changes, disrupting day-to-day support on many accounts.

QuestionPro

QuestionPro is a Niche Player in this Magic Quadrant due to its solid capabilities in gathering and analyzing direct and indirect feedback, but it has limitations with geographic and industry coverage and inferred data offerings. Its VoC solution is QuestionPro CX, a comprehensive core platform that offers survey creation, analysis and reporting, which is appealing to companies in the early stages of CX maturity. QuestionPro's customers tend to be midsize, but it has several large-enterprise customers. It supports organizations in a wide variety of industries, with most distributed across automotive, banking, consumer retail, e-commerce, transportation and healthcare. The company has a presence in all regions, with a concentration in North America, followed by EMEA. QuestionPro's platform investments include continued integration of AI into existing offerings, closed-loop capabilities, journey management analytics and root cause analysis.

Strengths

- **Simplified product for early-stage CX:** QuestionPro has strong capabilities in gathering, analyzing, displaying and reporting direct VoC data for clients focused on survey-based VoC programs at minimum cost. Its platform allows for the simple and effective creation of surveys, distribution and analysis, with AI-driven survey-creation prompts.

- **Go-to-market strategy:** QuestionPro has a clear and compelling product and go-to-market offering for small to midsize enterprises in a variety of industries at the beginning to early stages of their VoC program adoption. The QuestionPro product strategy and market focus concentrates on organizations that believe the dominant use of surveys will effectively meet their customer insight and CX requirements.

- **Low-cost solution:** QuestionPro offers core direct VoC-gathering approaches at a lower cost compared to other VoC vendors we evaluated. Prospective buyers are encouraged to understand and evaluate the potential of vendor offerings when comparing solution pricing.

Cautions

- **Limited AI capabilities:** QuestionPro's AI capabilities in extracting and analyzing indirect and inferred VoC data is not as robust as other vendors.

- **Limited large-enterprise support:** QuestionPro has limited experience in supporting complex, large enterprises. Its solution lacks advanced capabilities that these organizations may require, such as multiple department routing rules or multistep automated procedures integrating various AI capabilities.

- **Platform innovation focused on historical offerings:** QuestionPro continues incremental development and improvement of its platform, but its focus is primarily on legacy direct VoC data offerings. Potential buyers should assess their future needs around indirect and inferred VoC data, the necessity of GenAI within automated customer response, and complex reporting.

SMG

SMG is a Niche Player in this Magic Quadrant due to its tight industry focus and gaps in customer journey analytics capabilities. Its smg360 solution enables frontline and CX teams to understand how to turn customer feedback into actions that affect company finances and is best suited for companies with a large, location-based frontline staff. The majority of SMG's customers are midsize organizations, with the remainder being large-enterprise customers. Its customers are primarily in retail, consumer services, food service and consumer packaged goods. The company has a presence in North America and EMEA but is gaining a foothold in APAC. SMG is investing in deeper integration of the recently acquired Bulbshare product to enable community-driven collaboration between customers and employees, as well as expanding its data and analytics capabilities.

Strengths

- **Strong digital capability:** SMG offers integrations with web and mobile app digital adoption platforms, enabling users to link direct CX experience feedback to product

adoption. Potential buyers in subscription businesses may appreciate the ability to derive insights that inform customer success plays.

- **Effective voice of the employee capability:** SMG's Bulbshare enables customers to collect employee feedback through a community, with strong visualizations and convenient AI summaries of verbatim comments.

- **Good market understanding and execution:** SMG has a strong vision for community-driven co-creation of brand experience that aligns well with emerging demographic preferences.

Cautions

- **Limited direct sales strategy:** SMG has limited sales reach due to a lack of a partner strategy and no presence on app marketplaces. Organizations seeking to scale rapidly or integrate with a broader ecosystem may experience longer implementation times compared to other vendors.

- **Services-heavy model:** SMG emphasizes bundling services with its software. Potential clients should inquire about the degree to which they can manage a VoC program using SMG without overrelying on services.

- **Limited core functionality:** SMG lags behind competitors' offerings for collecting unstructured direct feedback and in visualizing and aligning survey results with the customer journey. Potential clients with complex journeys may need to customize the solution to get the level of analysis they require.

Sprinklr

Sprinklr is a Leader in this Magic Quadrant due to its strong capabilities in direct and indirect VoC data gathering and strong emergent capabilities in inferred data analysis. Sprinklr's VoC capabilities include full coverage across sources of direct and indirect feedback with its Surveys, Social Listening, Product and Location Insights and Contact Center Intelligence platform. In 2025, Sprinklr's VoC platform's name will change to Customer Feedback Management. Sprinklr is a good option for companies that may already be employing Sprinklr's existing capabilities in social media and customer service analytics but want additional capabilities in VoC. Its customers are an equal distribution of midsize and large enterprises. The company has a presence in all regions, with the majority in North America. Sprinklr's clients span most industries with a concentration in retail, finance and technology.

Its future development roadmap includes AI agents (formerly termed digital twins), CX modeling, industry trends and video-call analytics that incorporate human motion analysis.

Strengths

- **Well-designed comprehensive platform:** Sprinklr's VoC solution offers a clean UX with powerful direct and indirect VoC data gathering, analysis, reporting and automation. AI in data analysis and GenAI in customer-facing messaging offer well-designed and time-saving activities throughout the range of customer interactions.

- **Strong sales-cycle support:** Sprinklr uses a structured sales process across the sales team, sales support teams and other support services to create a well-presented and data-supported value offering. This value is reflected in both the technology platform and the benefits of CX improvements that prospective organizations realize. Business value modeling and other tools demonstrating the value generated from Sprinklr offerings are used at various stages in the sales cycle.

- **Robust training and customer community:** Sprinklr offers custom training, 24/7 support in six languages and premium support. It also offers in-person and virtual events, fostering collaboration and networking with its customers.

Cautions

- **Elementary inferred VoC data analysis:** Sprinklr's VoC solution has elementary inferred VoC data gathering, analysis and insights capabilities, which lack the maturity of the inferred data analysis capabilities of leading vendors. Potential buyers should fully understand and analyze their requirements for inferred VoC data capabilities when evaluating Sprinklr's solution.

- **Clear quantification of solution usage rates:** Sprinklr charges customers a "token" per-usage rate on the analysis of VoC data sources. Prospective buyers should have a precise VoC data-gathering usage rate or arrange for a pilot period to understand their token usage rate to ensure full utilization of purchased services.

- **Limited professional services:** Sprinklr offers a limited range of professional support services, putting potentially more work on the client. Buyers should fully define their essential vendor support service needs during implementation and deployment to ensure the vendor meets their requirements.

Verint

Verint is a Niche Player in this Magic Quadrant due to gaps in its indirect feedback analysis and its product release strategy. Its Verint Experience Management solution offers role-based, AI-driven insights on customer behavior and sentiment across digital channels, the contact center and retail locations. The solution is a good option for companies invested in Verint's contact center ecosystem. Verint's customers tend to be CX organizations in midsize to large enterprises in the insurance, financial services and healthcare verticals. The company has a presence in North America, EMEA and Asia/Pacific. Verint is investing in dynamic surveys, cross-channel personalization and journey orchestration using AI.

Strengths

- **Customer-service-driven CX:** Verint is a strong choice for clients looking to enhance their customer experience by using customer service data. For potential buyers already leveraging Verint's customer engagement center, digital customer service and workforce engagement management solutions, integrating with Verint's VoC capabilities enables businesses to effectively shape service processes and guide agent actions throughout the customer service journey.

- **Strong data ingestion and mapping:** Verint includes sophisticated tools for ingesting a variety of data types and mapping them together for later analysis. For prospective buyers with strong data analysis teams, these tools enable them to combine direct, indirect and inferred feedback from both customers and employees into a single dataset.

- **Unique customer effort detection:** Verint leverages data across channels and journey stages to estimate how much effort — or struggle — a customer has experienced before providing feedback. This effort is represented as a score and can be integrated into dashboards, making it easier to find pain points in the customer journey.

Cautions

- **Challenging user interface:** Verint's menu-driven user interface is not as intuitive, and it lacks the ease of use seen in other vendor platforms, such as the ability to drag and drop widgets while building dashboards.

- **Limited customer journey analytics:** Although Verint collects data and metadata across channels, its platform lacks out-of-the-box journey visualizations compared to its peers. Prospective buyers are encouraged to evaluate their own data and analytics maturity against the level required to build actionable dashboards in Verint's product.

- **Gaps in indirect feedback capability:** Verint lags other VoC vendors with their indirect feedback solution, including assigning indirect feedback to internal teams and aligning that feedback with a customer journey.

XEBO.ai

XEBO.ai is a Niche Player in this Magic Quadrant due to its early-stage growth and limited market presence. The AI-native company has a portfolio of feedback solutions, including Customer Experience, Employee Experience and Customer Journey Mapping, making it well-suited for organizations beginning their VoC programs. The company primarily has midsize through large enterprises as its customers. Its largest presence is in EMEA, followed by APAC. Customers span most industries, with many in financial services, the public sector, and the professional, technical or scientific services markets. XEBO.ai continues to invest in increasing its integration points, including social channels, and the application of AI for improved theme generation and detailed customer journey analysis.

Strengths

- **Support for indirect customer feedback:** XEBO.ai has good support for inclusion of social feedback, analyzing it for sentiment, top topics and ratings, with the ability to drill into individual data and verbatim comments.

- **Effective sales strategy:** XEBO.ai is building out direct support in targeted regions and building out channel partnerships in others. To help potential customers assess whether the platform meets their needs, the company provides a defined, templated POC approach and has an entry-level price that enables starting small.

- **Available international support:** The company provides 24/7 assistance available in five languages to support its global growth strategy.

Cautions

- **Limited innovation:** XEBO.ai has a compelling roadmap; however, the plans largely bring it even with others, rather than helping the company differentiate itself.

- **Lacks continuous community engagement:** The ability to learn from colleagues may be limited as Xebo.ai does not have an online customer community. The company's event-based strategy, including an annual conference, some regional events and webinars, limits the opportunities to engage with fellow peers and is not as robust as the communities offered by leading vendors.

- **Small size:** The company has been growing but is still small compared to other vendors we evaluated. It is also just beginning to establish a market presence in North America, which could require shifting investment focus.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- SMG, Sprinklr and XEBO.ai met this year's inclusion criteria.

Dropped

- Alida was dropped from this Magic Quadrant because it did not meet the criteria to publicly market the capabilities as a stand-alone VoC solution.

Inclusion and Exclusion Criteria

A broad group of providers offers VoC platforms. The vendors listed in this Magic Quadrant do not imply an exhaustive list of vendors in this market. To qualify for inclusion in the Magic Quadrant for Voice of the Customer, vendors were required to meet the following criteria:

The product must be publicly marketed and sold as a stand-alone product (i.e., buyers are not required to buy into a more extensive solution) that clearly aligns with a VoC focus, such as a "customer experience management platform to enable customer feedback, listening, analytics and action."

The product must meet Gartner's market definition for VoC platforms (outlined earlier). Specifically, the VoC platform must directly (i.e., not through another vendor product) support all three of the following capabilities:

- **Data collection** — The solution must be able to collect, aggregate, analyze and provide unified reporting on all three types of VoC data (i.e., direct, indirect and inferred feedback).

  - To collect inferred feedback, there should be a minimum of three out-of-the-box integrations with major providers of platforms in the following categories: customer relationship management (CRM), enterprise resource planning (ERP) and IT service management (ITSM).

- **Analysis and insight** — The solution must be able to apply AI to auto-tag topics and sentiment, analyze and generate insights, apply statistical analysis and generate detailed technical reports.

- **Action** — It must also automatically or manually act on generated insights using a variety of techniques to identify root causes of problems, trigger employee intervention and automatically trigger other applications without human intervention.

The VoC product version being evaluated must be generally available as of 1 August 2024.

The VoC product must be in production use by both B2B and B2C (or B2B2C) company use cases.

The provider must have at least 100 total employees.

The provider must have at least 25% of its customer accounts composed of midmarket companies ($100 million to $1 billion) and global enterprise companies ($1 billion-plus).

The provider must have physical presence in at least two regions (North America, Latin America, EMEA, Asia/Pacific).

The provider must have sales in at least three regions (North America, Latin America, EMEA, Asia/Pacific).

Evaluation Criteria

Ability to Execute

Product or Service

We specifically look for ability to:

- Collect data from a wide range of channels, which must include all three of direct, indirect and inferred forms of feedback

- Analyze customer feedback in a wide variety of ways

- Act based on customer insight in a wide variety of ways

Overall Viability

We specifically look for evidence of:

- Financial strength

- Customer growth and retention

- Other drivers of viability

Sales Execution/Pricing

We specifically look for:

- Direct and indirect sales revenue and customer growth

- Competitive win rate

- Pricing clarity, flexibility, affordability, value for the money spent and innovation

Market Responsiveness/Record

We specifically look for:

- Mergers and acquisitions in response to market demand

- R&D investment into new functionality making it easier for customers to implement and adopt

- Evidence of listening to, adapting to and aligning with customer needs and market trends

Marketing Execution

We specifically look for:

- Evidence of brand awareness, perception and strength

- Evidence of go-to-market differentiation

- Partner ecosystem, customer community, advocacy and customer success program strength

Customer Experience

We specifically look for:

- Evidence of high CX metric scores

- Customer community, advocacy and customer success program strength

- Mature CX business capability

- Evidence of customer communities and customer success

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Sales Execution/Pricing	Medium
Overall Viability	Medium
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High
Operations	NotRated

Source: Gartner (April 2025)

Completeness of Vision

Market Understanding

We specifically look for ability to:

- Listen to current customer demands, understand how those needs will evolve in future and adapt their roadmap accordingly.

- Grasp business and technology trends and their implications on customer experience initiatives.

- Demonstrate a grasp of current and future competitors and any overlap with adjacent software markets.

Marketing Strategy

We specifically look for clarity of:

- Differentiation (product, business practices, customer experience).

- Strong articulation of the ideal customer profile.

- Positioning to meet the needs of current ideal customer profile and new customer target segments.

Sales Strategy

We specifically look for:

- A defined approach on routes to market, including channel partners, digital commerce and marketplaces.

- A value-based selling strategy.

- Sound articulation of a product-led versus service-led sales strategy.

Offering (Product) Strategy

We specifically look for:

- Role-based and use-case-driven R&D investments that keep pace with customer expectations.

- Investments intended to support self-service versus service-led implementations.

- Architecture, platform scalability and UI/UX investments.

Vertical/Industry Strategy

We specifically look for evidence of:

- Product R&D, professional services and benchmarking investments to align with industry needs.

- Sales and marketing to support industry requirements and use cases.

- A partner ecosystem program to support development of industry versions.

Innovation

We specifically look for evidence of:

- Product innovation in new forms of customer data collection, analysis and action taking.

- Customer experience and operational innovation in new forms of training, education, events, licensing and organizational changes.

- Innovation through working with new forms of software and service partners.

Geographic Strategy

We specifically look for evidence of:

- Product R&D, professional services and benchmarking investments to align with local geographic needs.

- Sales and marketing to support local geographic needs.

- A partner ecosystem development program to support local geographic needs.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Offering (Product) Strategy	High
Market Understanding	High

Evaluation Criteria	Weighting
Marketing Strategy	Low
Sales Strategy	Medium
Business Model	NotRated
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (April 2025)

Quadrant Descriptions

Leaders

Leaders have the ability to execute their vision through AI-enabled VoC products and comprehensive customer success services, and demonstrate solid business results in the form of revenue and earnings. Leaders have significant successful customer deployments in a wide variety of industries, from small businesses to multiple proofs of deployment for more than 1,000 users. Leaders are often the vendors against which other providers measure themselves.

Challengers

Challengers have a more focused VoC strategy and more comprehensive platform than Niche Players. They have the size and product capabilities to compete worldwide, but they might not be able to provide a compelling vision. Challengers execute well in multiple departments and sizes of business or in both B2B and B2C organizations.

Visionaries

Visionaries deliver innovative and potentially market-changing solutions, but they struggle to meet the needs of all organizations due to geographic limitations, company size constraints and/or specific product limitations. They have strong potential to influence the direction of the market, but are limited in terms of execution and/or track record. There are no Visionaries in this year's Magic Quadrant.

Niche Players

Niche Players sometimes offer the best solutions for the needs of organizations of a particular size or industry, considering the price-to-value ratio of their solutions. But they may lack specific functionality or focus support on fewer functions or industries. They may offer complete portfolios but limit their market focus to specific segments or regions.

Context

This Magic Quadrant is designed to help buyers with the decision-making process regarding a VoC platform, providing details on the market and vendor capabilities that align with your business problems and technical concerns. Your shortlist should be determined by the complexity and scale of your requirements. This Magic Quadrant is not designed to be the sole tool for creating a VoC vendor shortlist. Use it as part of your due diligence, in conjunction with discussions with Gartner analysts and other VoC research, including the associated Critical Capabilities report (see **Critical Capabilities for Voice of the Customer Platforms**).

Gartner clients shouldn't assume a VoC Leader vendor is always the best fit for their company. Differences in product offerings, innovation and go-to-market strategies vary by vendor. Therefore, every provider in this Magic Quadrant, no matter its placement, may be a best fit for a client, and clients should explore how that diversity meets their business and CX needs. Gartner clients should follow a deliberate RFP process when selecting a VoC platform vendor. The RFP process aligns the buying team around the value for the purchase, creates consensus for the selected vendor, and helps ensure support for the implementation.

Gartner recommends focusing on the following factors when procuring and implementing a VoC platform:

- **Reference customers —** Always delve into the prospective vendor's customer base to explore exactly what is being delivered and the outcomes achieved. Look beyond the size of the deployment (number of users) to include the types of feedback, analysis and action being taken from it. Ask about client retention and tenure rates, along with efforts to improve customer experience. Use Gartner's Peer Insights platform as a resource.

- **Use case requirements —** VoC solutions should provide business value across a broad variety of departments and use cases, such as customer service, sales, marketing, digital commerce and frontline operations (e.g., for a restaurant chain). The needs of each participating department should be gathered and the anticipated business value evaluated to ensure alignment with objectives and expectations. A representative of each participating department should be involved in the vendor evaluation and decision-making process. Vendors are not equally competent within each use case, making this a key area for consideration.

- **Scope —** Determine the merits of aligning the VoC program with other programs as part of a broader initiative, which might extend beyond CX to include market research programs, plans for investment in customer success management or an employee experience initiative.

- **Selection criteria:** Beyond functional considerations, also closely scrutinize the vendor's data architecture, administration layer, UX, associated analytics and professional services organization (both technical and business-oriented). With increased emphasis on adhering to data privacy regulations, you must also understand how data will be stored, which team members will have access to it and how it will be used. For a detailed list of recommended criteria to use to evaluate VoC Platform vendors, see the tables listed in Note 1 in Develop Evaluation Criteria for a Voice of the Customer Platform.

- **Roadmap and innovation —** The vendors included in this Magic Quadrant have robust roadmap plans, including the use of GenAI. Ensure the direction the vendor intends to take is consistent with the vision of how you want to incorporate customer insights into your plans and processes. Expressly for the use of GenAI, validate where and how it will operate within the platform, and ensure your data is consistent with your corporate position on the extent of its use.

Magic Quadrants are snapshots in time. To be impartial and to complete our analysis, we stop our data collection efforts at a specific time for all vendors. For this Magic Quadrant, the

product/service capabilities needed to be in production and generally available at the beginning of August 2024 to be considered in our evaluation.

Market Overview

Market Trends

Some of the most common inquiries Gartner clients have raised regarding VoC vendors and their capabilities focus on AI adoption, data privacy, demonstrating the value of VoC programs and customer feedback collection methods. Our research shows the following trends in these areas.

AI Adoption

Many vendors now routinely offer generative AI features to improve decision making. These features include summarization of direct feedback, such as surveys and verbatim, as well as indirect feedback, such as reviews (though many do not yet incorporate inferred feedback), sentiment scoring, topic and theme identification. Many also offer categorization and interpretation of both structured and unstructured data. And based on this data, some vendors offer additional AI features, such as recommendations for coaching customer-facing agents, simulations of the impact of improving survey results or suggestions of next best actions for customers.

Additionally, many vendors now offer customers or their admins the choice of using an AI-enabled platform on a non-AI platform or turning on AI for specific features.

In the next 12 months, we expect to see all platforms offer:

- A self-serve chat or AI-assistant experience to help customers use the platform

- An expansion of existing AI features, including generated responses to feedback across more channels

- Responsive conversational surveys

- Stronger admin controls of AI, allowing customers to select the level of AI enablement, streamlining workflows and freeing time for more high-value activities

On the other hand, some generative AI features are still in their infancy. For example:

- While some vendors can segment customers based on an AI analysis of feedback, few can connect that effort to revenue-based segmentation.

- Most vendors can create personas based on AI feedback analysis, but few can tie personas to other key persona attribute data.

- Few can visualize customer interactions in a journey.

Organizations investing in a VoC platform can easily get lost in providers' AI technobabble and buzzwords, which impairs their ability to truly understand what AI solutions they need to achieve their VoC goals. To overcome this challenge, customers must prioritize their strategic objectives and partner with the VoC provider to identify what are "must haves" compared to "good to haves." Customers should also ask prospective vendors what AI features are truly in production versus in "preview" for a limited number of customers, and inspect the vendor's internal AI governance process and ethics principles.

Data Privacy Regulations

With a continued rise in country-specific privacy regulations around the world, VoC platform providers have continued to build safeguards to aid customers with compliance. These safeguards take different forms, including data masking on ingestion to block the storage of personally identified information. Some vendors also provide a unique identifier to support direct consumer feedback, associating a respondent with a specific interaction, store, context or journey stage despite any channel switching that may occur.

Additionally, the platforms provide a range of capabilities to limit which users (employees or partners) have access to specific data. That permissioning empowers customers to control access among different roles, groups or teams, hierarchies, projects or datasets.

Organizations investing in a VoC platform should continue to validate how VoC vendors mitigate data privacy risks as a part of the vendor selection process, ensuring alignment with their regional and business requirements. They should take the time to understand who has access to customer data and where that VoC data is being stored, even if it extends the sales cycle.

Demonstrated Value of VoC Programs

VoC platform vendors and buyers face ongoing pressure to demonstrate the value of a VoC program, especially one that includes more innovative data collection and analysis, which drives up the cost. This challenge is compounded by the relative immaturity of VoC

programs. Maturity tends to vary by geography and industry; U.S.-based organizations and those in the retail industry generally have the most mature VoC programs, while Latin American organizations and those in healthcare generally have the least mature programs.

Multiple vendors cite a lack of organizational responsibility for CX and budget constraints as factors that inhibit VoC program maturity. To overcome these obstacles, VoC vendors are helping organizations mature by showing them how structured and unstructured data integrations, robust analytics and reporting capabilities can help them tie their VoC results to business outcomes. Some of their methods include:

- Using their customer success teams to partner with customers in capturing the right data

- Conducting joint journey mapping exercises to highlight gaps in CX and data needs

- Offering support to help create customers' ROI stories using data

Organizations investing in a VoC platform should identify use cases that align with their strategic CX and business priorities. They can then partner with their VoC vendor to understand how to collect data that provides the needed insights. They should select a solution that enables them to take action and achieve measurable outcomes, and that provides support to help articulate the value of their program. This may involve asking vendors about how AI and other capabilities can increase speed to analysis and action, or where their solutions can identify untapped valuable VoC data to justify the spend and value of the program.

Feedback Collection Methods

Many organizations buy survey-focused solutions due to their ease of use and a lack of VoC mindset maturity among organizations that purchase these platforms. Among the service and support leaders who participated in the 2024 Gartner Technology Trends in Service Survey, 92% indicated their organization uses surveys in their VoC program. That number is expected to rise to 95% by the end of fiscal year 2025. However, organizations that limit themselves to only collecting survey data risk chasing the wrong assumptions or making unnecessary changes because they have incomplete or biased data. Those investing in a VoC platform should ask vendors about their solutions' ability to do more than just capture the answer to a survey question. Solutions should be able to listen for indirect feedback and incorporate data from other systems, such as call transcripts, to identify customer journey challenges. Leaders should also consider more robust survey solutions that offer GenAI

capabilities to help with more effective survey design, increasing response rates and capturing more actionable insight.

Vendors, to varying degrees, have pivoted toward other means of data collection. Some vendors prefer to pursue buyers who are interested in going beyond surveys, highlighting their indirect and inferred collection capabilities. This approach challenges the relevance of established survey methodologies and threatens the foundational business models of those VoC vendors who remain focused on legacy survey solutions.

Market Growth

Vendors in this research showed 22% revenue growth on average in 2024. Following are detailed findings on growth and financials for the market.

VoC Market Size

We estimate the traditional players in the VoC platform market — those that rely on mature North American and European markets, where enterprise buying cycles slowed and cost-conscious budgeting was pervasive — grew 5% in revenue on average in 2024. Newer and smaller players grew 90% on average in 2024, as they took share and acquired new customers in fast-growing VoC markets such as the Middle East. Overall, market growth is based on a weighted average, given that the large VoC players account for approximately 80% of the total market revenue.

The size of the VoC platform market overall was estimated at $7.2 billion in 2023, growing to $8.7 billion in 2024. These market size figures are calculated based on vendors that offer comprehensive VoC platforms (as defined in this Magic Quadrant) as well as those that offer partial feedback solutions, such as survey-only platforms and platforms that offer surveys as an add-on.

VoC Market Forecast

Market revenue growth has averaged between 15% and 25% over the past decade. We also anticipate the pace of growth to increase for the larger VoC providers as they monetize their AI features, and slow slightly for the newer and smaller entrants in the 70% to 80% range.

Tailwinds for growth include moving to consumption-based pricing models for AI-based platforms, as Qualtrics and Medallia have done, or charging more for AI-enabled features. In addition, growth is likely to be high for markets where CX programs are growing (such as the

Middle East) as well as markets with social listening (such as Asia) and digital listening (such as Latin America).

A significant headwind for growth is customers' potential move to do-it-yourself solutions for VoC by deploying private instances of GenAI models, such as ChatGPT, and mining their own feedback data for insights. Other headwinds include longer deal cycles, which become more likely as large enterprises establish processes to review any AI software purchasing and centralize enterprise software spend within the corporate IT function to limit the risk of AI investments.

More Than $1 Billion in VoC Revenue Generated

One vendor exceeded $1.5 billion in annual VoC product revenue in 2024, and is expected to generate $2 billion in VoC revenue in 2025. Only two other vendors exceeded $750 million in VoC revenue in 2024. Note that these are estimates, given that some vendors in this Magic Quadrant manage an extensive product portfolio, of which their VoC product is only one offering.

Mergers and Acquisitions

Very little merger and acquisition activity occurred in 2023 and 2024. Notably, smaller players looked to acquire AI expertise and capabilities, as evidenced by SMG's acquisition of Bulbshare in 2024, and QuestionPro's acquisition of PathosAI in 2023. Concentrix's acquisition of Webhelp closed in 2023, expanding its VoC footprint in Europe significantly.

Privately Held Vendors

With the exception of Concentrix, Sprinklr and Verint, all vendors in this Magic Quadrant are privately owned. As a result, their financial health and future viability are less visible to customers due to the lack of public financial disclosures.

Acronym Key and Glossary Terms

AI	Artificial intelligence
API	Application programming interface

BPO	Business process outsourcing
B2B	Business-to-business
B2B2C	Business-to-business-to-consumer
B2C	Business-to-consumer
CATI	Computer-assisted telephone interviewing
CCaaS	Contact center as a service
CRM	Customer relationship management
CSM	Customer success management
CX	Customer experience
DCS	Digital customer service
DEI	Diversity, equity and inclusion
EX	Employee experience
GenAI	Generative AI
IPO	Initial public offering
ISV	Independent software vendor
LLM	Large language model

M&A	Mergers and acquisitions
MX	Market experience
NLP	Natural language processing
NPS	Net Promoter Score
OEM	Original equipment manufacturer
PX	Product experience
R&D	Research and development
SMB	Small/midsize business
SwaS	Software with a service
UX	User experience
VoC	Voice of the customer
VoE	Voice of the employee
WEM	Workforce engagement management

⊕ Evidence

⊕ Evaluation Criteria Definitions