

# Magic Quadrant pour les plateformes d'écoute client

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Les plateformes VoC aident les entreprises à collecter, analyser et exploiter les retours clients, facilitant ainsi la compréhension des clients et l'atteinte d'objectifs stratégiques. Cette étude vous permet d'identifier les fournisseurs dont les plateformes VoC sont les mieux adaptées à vos objectifs d'expérience client et commerciaux.

## Définition/Description du marché

Gartner définit une plateforme d'écoute client (VoC) comme une plateforme unique et interconnectée qui intègre la collecte, l'analyse et la prise en compte des retours d'information, permettant ainsi de comprendre et d'améliorer l'expérience client. Les sources de retours d'information ne se limitent pas aux enquêtes directes ; elles incluent également des sources plus indirectes et implicites.

Les plateformes VoC permettent aux responsables de fonctions telles que le service client, le marketing ou les ventes de mieux gérer l'expérience client grâce à une compréhension approfondie des besoins, des motivations, des objectifs et des comportements des clients. Les informations ainsi recueillies déclenchent des recommandations et des actions à l'échelle de l'entreprise.

Les cas d'utilisation courants comprennent :

- **Les données VoC proviennent exclusivement d'enquêtes** : ce scénario implique la réalisation indépendante d'enquêtes annuelles ou régulières de satisfaction client, avec peu ou pas de collecte de retours indirects ou implicites. Les données ne sont généralement pas partagées au sein de l'organisation.

- **Les sources de données VoC incluent les retours indirects** : ce scénario implique l'intégration des retours clients directs avec les retours indirects, tels que l'analyse de texte, l'analyse des médias sociaux et l'analyse vocale. Les données sont centralisées, partagées et analysées de manière plus globale.
- **Les sources de données VoC s'étendent aux retours d'information indirects** : ce scénario implique l'intégration des retours clients directs et indirects afin d'inclure les données inférées. Ces données peuvent comprendre des analyses numériques, des analyses du parcours client et des données opérationnelles pour obtenir une vision plus globale du client.
- **Les données VoC sont diffusées et intégrées** : ce scénario est axé sur la diffusion de données pertinentes et en temps réel via des flux de travail, des rapports et des tableaux de bord, tout en intégrant ces données VoC dans des applications fréquemment utilisées telles que les CRM.
- **Les enseignements tirés de la VoC ont un impact sur les résultats commerciaux** : ce scénario se concentre sur la capacité à quantifier les actions découlant des enseignements tirés de la VoC et leur impact sur l'expérience client et les résultats commerciaux.

## Fonctionnalités obligatoires

Les fonctionnalités obligatoires d'une plateforme VoC sont les suivantes :

- Collecte de données — La capacité de collecter les trois types de données VoC :
  - Commentaires directs — Commentaires que les clients souhaitent fournir directement à l'organisation, soit lorsqu'on le leur demande, soit suite à leur expérience. Ces commentaires prennent généralement la forme d'un sondage, les réponses étant recueillies par divers canaux : courriel, site web, support papier, SMS, appel vocal, vidéo, application mobile, produit intégré, communauté en ligne et panels audio/vidéo en direct .
  - Commentaires indirects — Commentaires recueillis lorsque le client parle d'une organisation sans chercher spécifiquement à lui faire part de son avis. Ces commentaires incluent les informations recueillies sur les sites d'avis, les forums, les réseaux sociaux et lors des interactions avec le service client par téléphone, vidéo, courriel et messagerie instantanée.

- Commentaires déduits — Données opérationnelles et comportementales associées à une expérience client (CX) ou à un parcours client, telles que les données de flux de clics d'un site Web, les analyses de produits, les données de télémétrie, les données de localisation d'une application mobile ou les données opérationnelles d'un centre de contact.
- Analyse et perspicacité — La capacité de :
  - Appliquer l'IA générative pour étiqueter automatiquement les sujets et les sentiments.
  - Analyser et extraire des informations pertinentes à partir d'ensembles de données de rétroaction structurées et non structurées afin de générer une variété de visualisations et de rapports personnalisés.
  - Appliquer diverses techniques d'analyse statistique (régression, analyse conjointe, etc.).
  - Générez des rapports incluant des tableaux de bord personnalisés ainsi que des nuages de mots traditionnels, des parcours utilisateurs générés par l'IA et des modèles prédictifs et prescriptifs basés sur l'IA.
- Action — Capacité à agir automatiquement ou manuellement en fonction des informations générées grâce à l'utilisation de recommandations et d'automatisations basées sur l'IA, ainsi que d'alertes, de flux de travail et d'attributions de cas traditionnels. Les actions peuvent comprendre une combinaison de résolution des causes profondes des problèmes (boucle externe), de déclenchement en boucle fermée d'une intervention d'un employé (boucle interne) et de déclenchement automatisé d'autres applications sans intervention humaine (boucle automatique).

## Caractéristiques communes

Les caractéristiques communes d'une plateforme VoC incluent :

- Les sources de données englobent les interactions humaines (entretiens, panels, forums et groupes de discussion) et les interactions numériques (sondages et enquêtes intégrés aux applications, sites d'avis, réseaux sociaux, échanges avec les clients, sites web, applications et communautés en ligne). L'analyse des comportements d'achat et des conversions/transactions, des données de géolocalisation, des données de prestation de services, des données d'utilisation et d'adoption, des données de performance des

processus et des canaux, ainsi que des données relatives au service client et aux paiements, permet d'obtenir des retours d'information.

- La capacité à agréger et à relier les données VoC directes et indirectes aux données opérationnelles et financières inférées associées inclut l'engagement sur site/application, les temps d'attente au téléphone, les parcours de réponse vocale interactive (RVI) et les revenus contestés. Des tableaux de bord personnalisables et adaptés au secteur d'activité, des flux de travail, des intégrations opérationnelles pertinentes prenant en charge les services spécialisés, des capacités d'analyse comparative et des outils de diagnostic utilisant des modèles prédictifs et prescriptifs basés sur l'IA sont également courants.
- L'intégration d'un système de retour d'information automatisé en boucle fermée avec d'autres systèmes d'entreprise permet de déclencher des actions directement dans un système tiers (par exemple, l'ouverture d'un ticket d'assistance) et de suivre les résultats. Les flux de travail doivent combiner l'identification de la cause première avec une résolution automatisée ou assistée par un humain.
- La possibilité d'adapter la configuration en fonction de la taille de l'entreprise permettra de prendre en charge différents niveaux de complexité organisationnelle, le nombre d'utilisateurs et l'éventail des services participants.
- Possibilité de configurer ou de personnaliser pour répondre aux besoins des approches de commercialisation spécifiques d'une organisation B2C, B2B ou B2B2C.
- Capacité à collecter des données opérationnelles, comportementales et d'engagement provenant de plateformes tierces gérées par des revendeurs, des partenaires ou des places de marché tierces.
- Intégration de données issues d'autres méthodologies d'études de marché telles que les groupes de discussion, les tests A/B, les rediffusions de sessions, les journaux vidéo, les tests utilisateurs, les entretiens avec des experts et les études ethnographiques.
- Analyse des sentiments pour formuler des recommandations sur l'utilisation d'une terminologie et d'un vocabulaire spécifiques au cours d'une conversation.
- L'analyse du parcours client permet de connecter et de visualiser les données opérationnelles, affichables via des cartes de parcours, par exemple pour analyser la manière dont les clients utilisent les canaux disponibles pour interagir.

- Analyses et actions optimales recommandées par l'IA générative à partir des données de retour client.
- Association des données VoC directes, indirectes et inférées pour aligner le service spécifique fourni à un point de contact du parcours client avec les commentaires clients au niveau de l'interaction afin de prédire le service requis pour garantir une satisfaction client élevée.

## Quadrant magique

Figure 1 : Quadrant magique des plateformes d'écoute client





## Points forts et points faibles des fournisseurs

### Alchimiste

Alchemer se positionne comme un Challenger dans ce Magic Quadrant. Sa plateforme repose sur Alchemer Survey, complétée par Alchemer Connect, Alchemer Pulse et Research Solutions, qui assurent respectivement l'intégration, la collecte de données et l'analyse de marché. Elle séduit les entreprises recherchant une plateforme simple d'utilisation et rapide à déployer. Alchemer est présente dans toutes les régions du monde. La plupart de ses clients sont des PME en Amérique du Nord, mais près d'un tiers sont de grandes entreprises. Ses clients couvrent 17 secteurs d'activité, principalement l'éducation, l'informatique, les

services aux entreprises et aux consommateurs, et le secteur public. Sa feuille de route prévoit une vision unifiée des données consolidées, l'automatisation par l'IA et l'analyse des tendances, ainsi que la détection proactive des risques de conformité et d'atteinte à la réputation.

### *Points forts*

- **Market understanding:** Alchemer has a solid understanding of how the VoC market is changing and customers' go-forward business needs, which is influencing its solution investment. This benefits customers who want a thought partner that incorporates market factors into its future platform design.
- **Ease of use:** Gartner Peer Insights feedback indicates Alchemer's solution is intuitive, which helps make its onboarding time one of the lowest among vendors in this report.
- **Customer success:** The vendor continues to provide strong support for customer enablement, with dedicated customer success managers per account, promoting higher engagement and speed to value. The custom workshops in its Business Labs program help customers improve their business outcomes through strategic adoption and integration guidance.

### *Cautions*

- **Managed services cost:** The rate for managed services offered directly by Alchemer, not via partners, is high compared to that of other vendors evaluated in this research. This could be limiting for some small-to-midsize enterprise clients wanting support evaluating VoC program health and improving quality of data received.
- **Geographic customer distribution:** Its customer base outside of North America is small compared to some other vendors'. Prospective customers should verify that Alchemer's geographic footprint can support their future regional growth needs.
- **Extent of innovation:** Alchemer's recent product updates do not match the extent of innovation seen from leading VoC vendors, such as in advanced analytics. Customers should understand its roadmap to ensure it meets their needs.

## **Concentrix**

Concentrix is a Niche Player in this Magic Quadrant. ConcentrixCX can ingest all VoC data types, produce AI-driven insights, automate orchestrated workflows and recommend actions

and coaching.

ConcentrixCX is best suited for large international enterprises that require strategy consulting and professional services in addition to a VoC platform. Most customers are very large enterprises (over \$1 billion in revenue). They span nine industries, with most in financial services or insurance. The vendor operates in the Americas, EMEA and APAC. Concentrix is further investing in AI, as shown by its public announcement of an “Agentic Operating Framework,” although the impact on the VoC solution is not clear yet.

*Concentrix declined requests for supplemental information or to review the draft contents of this document. Gartner’s analysis is therefore based on other credible sources.*

### Strengths

- **Financial strength:** Concentrix is a publicly traded global company with almost \$10 billion in revenue, giving customers peace of mind in terms of vendor stability.
- **Marketing execution:** Concentrix provides a total VoC solution, including both software and services, supporting customers with unique needs at various maturity levels with, essentially, a customized engagement model.
- **Vertical/industry strategy:** Concentrix offers out-of-the-box taxonomies and category models for specific industries, such as financial services, shortening its time to value. Customers can also build their own custom models.

### Cautions

- **Partner relationships:** Concentrix has co-selling partners but lacks a formal ecosystem of services partners, which affects large customers who have complex needs requiring customization and sophisticated integration.
- **Professional services:** 100% of Concentrix customers rely on its in-house services for the end-to-end design, build, and ongoing management and support of the VoC program. Even customers with dedicated CX resources who prefer self-service must pay for all postsale support needs.
- **Sales strategy and execution:** Customers who prefer to work through existing channel partners for software purchases will not have that option, as Concentrix relies on direct sales. While Concentrix typically offers the predictability of fixed-cost pricing, those costs can vary greatly depending on the extent of services used.

## Medallia

Medallia is a Leader in this Magic Quadrant. Its VoC solution, Medallia Experience Cloud, is designed to capture, analyze and act on experience signals across every channel, including point of sale and connected devices. It also collects digital behavior and benchmarking data. It is best suited for complex enterprises needing to unify signals across all touchpoints. Customers are typically large global organizations with revenue exceeding \$1 billion and over 5,000 employees. Medallia maintains a global presence across North America, EMEA, LATAM and APAC. Its platform supports 17 industries, including hospitality, retail and automotive. It is continuing to invest in agentic messaging, GenAI expansion and autonomous action centers.

### *Strengths*

- **VoC data integration:** Medallia provides a unified, data-integrated view of the customer by connecting 100% of direct, indirect and inferred signals into Total Experience Profiles. This integration allows brands to move beyond measurement into proactive orchestration and personalization for individual customers and B2B accounts.
- **Frontline employee reporting:** Medallia's "Frontline-Ready" AI solutions democratize real-time diagnostics for over 7 million weekly users. These capabilities preserve capacity for data science teams by enabling employees, business unit leaders and CX leadership to immediately generate effective insights based on VoC data indicators.
- **Data dissemination:** The vendor's enterprise-grade architecture and Org Sync technology enable automated management of complex hierarchies and real-time personnel updates. This capability provides the right VoC data delivery to specific teams, geographies and roles.

### *Cautions*

- **Total cost of ownership:** Enterprises may find the platform carries a higher total cost of ownership compared to peers' due to its complexity and frequent requirement for managed services. Prospective customers should carefully evaluate the list rates for these services.
- **Implementation timeline:** Medallia is decreasing implementation time, but the platform's average time to implement remains one of the longest compared to other vendors in this

research. Customers should seek clear commitments on rollout milestones to ensure they achieve expected ROI within their desired time frame.

- **Self-service:** While Medallia is expanding its self-service capabilities, many advanced configurations still require significant technical expertise or vendor involvement. Prospective customers are encouraged to assess the level of internal resources required to manage complex program changes without professional services.

## Pisano

Pisano is a Challenger in this Magic Quadrant. Its VoC platform appeals to customers wanting an affordable, easy-to-use solution with a short time to value. Its largest customer base is in EMEA, followed by North America, with growing coverage in other regions. Almost all customers are midsize to large enterprises. Customers span 10 industries, with large concentrations in transportation, travel and hospitality, retail, insurance and financial services. Its roadmap includes investment in a journey analytics and orchestration solution, expanding its indirect and inferred capabilities, and increasing the autonomy of its GenAI assistant, Leo.

### *Strengths*

- **Predictable pricing:** Pisano's licensing and pricing model is a simple, flat package fee that includes unlimited users, surveys and feedback, creating stability for customers.
- **Identifying business value:** Pisano helps customers develop a business case to justify the purchase and use of its VoC solution. It also supplies benchmark data, conducts value workshops and aligns platform capabilities with business outcomes to help customers realize the value of their investment.
- **Ease of use:** Gartner Peer Insights reviews indicate Pisano's platform is intuitive, creating a low-effort user experience. The time it takes to implement and onboard is one of the lowest among vendors in this report.

### *Cautions*

- **Community engagement:** Pisano's community engagement activities are not as robust as other vendors'. While it hosts live on-site customer breakfast and panel events in EMEA, along with virtual webinars and training for all regions, it lacks digital community forums, user conferences and advisory boards.

- **Extent of innovation:** Pisano's releases and solution improvements were not as innovative as leading VoC vendors'. While some new roadmap plans look promising, several new features this past year, such as AI advancements, helped Pisano catch up to competitors' standard offerings instead of propelling it ahead.
- **Integrated partner ecosystem:** Pisano's integrated partner ecosystem is smaller compared to leading vendors, with a primary focus on specialized advisory and managed service providers. Prospective customers should verify that specific, deep integrations with their existing CRM or CCaaS stacks are available or can be supported through Pisano's APIs.

## Press Ganey Forsta

Press Ganey Forsta is a Leader in this Magic Quadrant. Its VoC platform, Human Experience (HX), is well suited for mature programs in regulated industries due to its rich support for global privacy regulations. Customers have been mostly large enterprises, with concentrations in healthcare, financial services and insurance, but the recent acquisition of InMoment brings more traction among midsize businesses and in retail and business services. Press Ganey Forsta's largest geographic presence is in North America, but it has plans to further expand its EMEA and APAC operations. Near-term investments will focus on the integration of InMoment's AI-powered insight generation and feedback management.

*Press Ganey Forsta declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.*

### Strengths

- **Service models:** It provides a full spectrum of service models, ranging from true self-sufficiency to fixed-price bundled services, to globally managed services. Customers can flexibly toggle between total autonomy and high-touch strategic advisory as their VoC programs mature.
- **Scale for large enterprise support:** The vendor can support hundreds of thousands of simultaneous platform users. It can also support complex organizational structures and assign individual users to multiple roles across multiple hierarchies.
- **Healthcare sector expertise:** The vendor maintains a leadership position in the healthcare sector, with specialized regulatory benchmarking. Its complex industry datasets and

experience with HIPAA-compliant data handling provide a significant edge for healthcare-focused enterprises.

### *Cautions*

- **Organizational change:** Press Ganey Forsta's 2025 acquisition of InMoment, followed by Qualtrics' announced intent to acquire Press Ganey Forsta have introduced volatility. Prospective customers should assess their goals against the specific solution being proposed and whether the solution and customer experience will meet their requirements.
- **Vertical starter accelerators:** Press Ganey Forsta offers fewer starter kits for a broad range of verticals compared to other Leaders in this research, focusing instead on bespoke configurations for specific complex industries like healthcare. Prospects outside their core sectors should evaluate the potential for longer implementation timelines and increased reliance on professional services to build program foundations.
- **Public customer reviews:** Compared to other Leaders in this research, there are few recent customer reviews available on Gartner Peer Insights and other review platforms. Prospective customers should seek customer reference calls during their analysis.

### **Qualtrics**

Qualtrics is a Leader in this Magic Quadrant. Its VoC solution, part of the XM for Customer Experience suite, is best suited for businesses with a high volume of transactions and public sector entities. Over half its customers are small enterprises, but the next biggest group is companies with over \$1 billion in revenue. In-region operations span the Americas, EMEA and APAC. The vendor supports 18 industries, particularly education, financial services, government and various services industries. Qualtrics is investing in synthetic customer panels for market research and AI agents, such as recommendations agents. Separately, it is investing in a business outcome simulator so users can prioritize investments.

### *Strengths*

- **Product offering:** Qualtrics offers robust feedback capture, including native product analytics and uniform customer account identifiers, to help customers combine data under account profiles. Its intuitive data outputs provide many options for insight generation, and AI features like Insights Explorer create instant, custom reports from unstructured feedback.

- **Breadth of industries served:** Qualtrics' vertical-specific, pre- and postsale teams span the customer life cycle and include dedicated solution engineers, and consulting and success teams. The vendor has extensive industry-specific resources, including digital content and benchmarks.
- **High-value marketing investments:** CX leaders benefit from Qualtrics' comprehensive GTM approach, which engages executives through thought leadership from XM Institute (e.g., CX Trends Reports, masterclasses), a community and events, and an extensive partner network enabled with messaging and certifications.

### *Cautions*

- **Cost and pricing structure:** Qualtrics CX Suite is one of the market's higher-priced solutions. The shift to an interaction-based pricing model allows unlimited users on both the "base" platform (new AI features not included) or the AI-enabled platform. Customers should ask for both to be quoted in order to manage costs and select the best option based on their CX program maturity. All customers should ensure they ask for the "excess usage" cost to be specified in their quotes to avoid pricing surprises if they exceed the committed interaction volume.
- **M&A strategy:** Qualtrics announced its intent to buy Press Ganey Forsta, another Leader in this research (which recently acquired InMoment). This combination of three large vendors would create potentially distracting integration work in the short term and increase market power in the long term. This could result in an inconsistent CX and reduced negotiating leverage for prospective customers.
- **Competitive parity:** Qualtrics has not introduced model context protocol (MCP) allowing cross-agent orchestration between VoC platform agents and other AI agents to enable enterprise workflows.

### **QuestionPro**

QuestionPro is a Niche Player in this Magic Quadrant. QuestionPro Core CX aligns well for organizations requiring unified sentiment analytics and closed-loop workflows at a lower price point. It is now integrated with SuiteCX for journey management reporting. Customers tend to be midsize and large enterprises seeking more actionable recommendations for a growing VoC-data-driven culture. The company has a presence in North America, EMEA and APAC. Its customers span a total of 17 industries, with concentrations in retail, BFSI and

healthcare. Roadmap investments include agentic AI, multidimensional journey maps, integrated customer reporting and automated action plans.

### *Strengths*

- **Integrated customer journey management:** QuestionPro offers a fully integrated customer journey management platform, connecting touchpoint measurement with strategic action plans. This integration capability supports journey management and enables organizations to track improvement opportunities and progress.
- **Direct and indirect data analysis:** The platform's AskWhy capability utilizes GenAI for natural-language question sessions to help identify the root causes of customer dissatisfaction and provide natural-language action recommendations tailored to specific industries. These automated insights empower frontline managers to act quickly without needing deep analytical training.
- **Global language integration:** QuestionPro supports over 100 languages natively in its manager portals, providing exceptional global reach and accessibility for localized teams. The platform ensures data integrity through AI-driven anomaly detection and offers flexible data residency in multiple global regions.

### *Cautions*

- **Advanced service fees:** A significant portion of QuestionPro's advanced services require additional fees beyond the standard annual license. Prospective customers should carefully understand, define and evaluate these recurring and nonrecurring costs to justify the total investment when comparing solution pricing.
- **Partner ecosystem:** The vendor has a small but growing partner ecosystem. The potential limited partner availability in some geographic areas could reduce viability during implementation and utilization. Prospective customers should seek clear case studies from partners to validate implementation outcomes in their respective geographies and industries.
- **Third-party voice analytics:** The platform does not currently have voice analytics developed in-house, relying instead on third-party partners for call center analytics and transcription. Organizations that prioritize indirect VoC contact center data as their primary source of VoC data should review the roadmap for these planned internal capabilities.

## Revuze

Revuze is a Niche Player in this Magic Quadrant. Its platform comprises several products, including the Competitive Intelligence, Product, Marketing and CustomerCare Hubs. It is best suited for product companies that generate high volumes of social feedback and reviews. Customers are distributed across the small, midsize and large tiers but skew toward large enterprises. Revuze has in-region operations in North America and EMEA. It supports customers in three industries, primarily retail and consumer packaged goods (CPG). It is investing in a conversational assistant to ask questions across all VoC data, and an agentic AI suite with autonomous capability to complete tasks like closed-loop actions.

### Strengths

- **Market understanding:** Revuze demonstrates better market understanding than traditional vendors that lead with direct feedback capabilities because its primary focus is leveraging AI to mine indirect VoC data, which is higher volume and continuous. That allows VoC data to become an enterprisewide intelligence layer serving all functions. Customers who embed VoC into their business decision making and workflows will especially benefit.
- **Marketing strategy:** Revuze articulates a clearly defined strategy targeting global, multichannel B2C brands (e.g., CPG, household goods and electronics). It demonstrates a detailed understanding of buyer needs, such as defect detection, competitive benchmarking and launch optimization.
- **Vertical/industry strategy:** Revuze's product is uniquely tailored for global CPG and e-commerce-led product companies. Pre- and postsales teams are staffed with specialists in the targeted consumer retail verticals, providing industry-specific business cases, benchmarks, onboarding and workflow guidance.

### Cautions

- **First-party VoC data:** Customers can design and run surveys in the Revuze platform. However, they must fully rely on Revuze to collect indirect and inferred feedback on their behalf. Lack of control over these feedback sources presents a serious limitation, unless the customer already relies heavily on the sources Revuze favors (i.e., e-commerce data, product reviews).
- **Product capabilities and strategy:** Revuze's products are highly tailored to consumer product companies, limiting their relevance for the service or B2B sectors. Revuze lacks a

VoE feedback solution.

- **Overall viability:** With Revuze's narrow set of customers and limited revenue, its customers should be cautious of developing too much vendor dependency.

## SMG

SMG is a Niche Player in this Magic Quadrant. Its Ignite platform integrates CX, frontline employee experience and brand experience. SMG is good for CX teams needing segmentation across multiple brands and location-based touchpoints. A plurality of customers are midsize organizations, but it also serves small and large enterprises. Customers are primarily in retail, consumer services, food service and consumer packaged goods (CPG), with growth in other industries. SMG operates mostly in North America but has a strong presence in EMEA. Its roadmap includes investments in unified guest recovery, AI agents for alerting and action, and advanced data exploration tools.

### *Strengths*

- **Voice of employee:** SMG uniquely combines VoE with financial data to quantify the impact of employee experience on revenue. It also uses a community-based platform for collaboration with staff and growing brand experience management.
- **AI applications:** SMG's Ignite solution enables advanced capabilities like Knowledge Agent for conversational data interrogation, and sophisticated features like Areas for Focus, which uses proprietary algorithms to identify specific unit-level improvements and create action plans, and more engaging user training and onboarding.
- **Brand and location segmentation:** SMG's focus on and deep experience in specific industry verticals, such as retail and CPG, allows it to cater the platform to their needs. The segmentation capabilities across brands and locations enable organizations to manage varied customer and employee experiences and tailor specific segment insights.

### *Cautions*

- **Automated actions:** Automated responses rely on templates and manual user steps to initiate. Customer-facing responses are limited to public online review sites, though SMG plans to add responses to interactions across other channels.
- **Customer journeys:** Ignite lacks a comprehensive journey view across the customer life cycle and touchpoints, which limits customers' ability to understand the relationship

between events and interactions. Richer journey views require customization via add-on consultative services.

- **Reliance on partners:** SMG relies on partners for key capabilities such as voice-to-text transcription and digital behavior analytics (e.g., session replay via Mouseflow), rather than offering these natively. This reliance may complicate support or integration compared to vendors with fully native stacks for these functions.

## Sprinklr

Sprinklr is a Leader in this Magic Quadrant. Its VoC solution, the Unified-CXM Platform, is best suited for enterprises needing to manage structured programs and large amounts of indirect and inferred VoC data as well as VoC data from contact centers. Sprinklr's customers are typically large enterprises with revenue greater than \$1 billion and over 1,000 employees. Its operations span the Americas, EMEA and APAC. It supports 10 industries, most notably technology, retail and financial services. Its roadmap investments include specialized AI agents, LLM Data Insights, and unified human and agentic workflows.

### *Strengths*

- **Proprietary data model:** Sprinklr's unified data model normalizes feedback across over 30 digital channels and internal data sources, creating a 360-degree view of the customer. This enables seamless analysis within a single platform without manual data stitching.
- **Integration of AI agents:** The platform features advanced specialized AI agents and a no-code builder that allows customers to deploy autonomous agents for personalized, real-time service recovery. These agents can complete purchases and resolve complex queries, enabling proactive execution at scale.
- **Indirect data analysis:** Sprinklr excels in omnichannel listening, capturing indirect customer feedback across a wide range of digital and social channels, including platforms such as TikTok, Snapchat and Bluesky. This capability allows customers to stay ahead of viral trends and mitigate brand risks in real time through an integrated AI-powered crisis alert feed.

### *Cautions*

- **Potential configuration complexity:** When there is configuration complexity, smaller VoC teams may find the platform's extensive feature set to be challenging without significant

investment in professional services. Prospective customers should assess the internal resource requirements needed to manage the system effectively.

- **Pricing transparency:** Customers may find that the platform's modular SKU structure and multiplicative price metrics may be complex and make calculating a TCO difficult. Prospective customers should evaluate the upcoming shift toward token-based pricing to ensure it provides the transparency and commercial predictability they require for budgeting.
- **Partner ecosystem:** Sprinklr's GTM approach focuses heavily on a direct sales model, though it is actively growing its partner ecosystem with global system integrators. Prospective customers should verify the availability of certified implementation partners in their specific region to support large-scale transformation programs.

## Verint

Verint is a Niche Player in this Magic Quadrant. Its Verint Voice of the Customer Software solution offers enterprisewide insights on CX and sentiment across digital channels, contact centers and retail locations. It is a good option for companies already using other Verint contact center products that want to integrate operational and customer data. Customers tend to be midsize to large enterprises in a variety of industries, including insurance, financial services, telecom, healthcare and retail. The company has a presence in North America, EMEA and Asia/Pacific. Its roadmap includes AI-powered internal bots and survey engines, brand trackers, and natural-language survey design.

### Strengths

- **AI applications:** AI is applied across user features to enable faster time to insight and action, and to uncover new areas for analysis. Various internal use-case bots query interactions, correlate operational metrics, identify failure points and discover patterns to predict future behavior.
- **Interaction analysis:** Verint leverages its platform to capture and analyze all interactions, using AI to identify trends and sentiment from calls, chats and emails. Its mature speech and text analytics capability is enhanced by its AI Genie Bot to deliver a richer view into the service experience and agent performance.
- **Data integration:** Verint offers advanced capabilities for importing multiple forms of data and linking them for analysis. Organizations with robust data analytics teams can leverage

these features to merge direct, indirect and inferred feedback from customers and staff into one unified dataset.

### *Cautions*

- **Product strategy:** Verint's legacy focus on contact centers can detract from its holistic experience management. Its products are not designed for enterprise-grade deployment or broader CX and journey visualization outside the contact center environment.
- **In-product support:** Limited guidance in Verint's products requires users to seek support elsewhere, but that path is not always clear. Support links appear on some pages and contain limited resources, often leading to assisted-service contacts.
- **Platform performance and agility:** Users voice concerns about the agility of new features and capabilities, indicating that Verint's UX innovation is slower than that of some competitors. Its user interface is not as intuitive and can be cumbersome in building reports and dashboards.

### **XEBO.ai**

XEBO.ai is a Niche Player in this Magic Quadrant. Its platform is a collection of products designed to meet CX, employee experience, social listening, market research and customer journey mapping needs. It is well-suited for VoC programs utilizing both surveys and social feedback. Its customers range from small to large enterprises. Headquartered in the U.S., the vendor spans North America, EMEA and APAC, with its strongest presence in the Middle East. It serves many industries, showing the most traction in the public sector, followed by financial services and insurance. XEBO.ai continues to invest in AI capabilities such as autonomous ticketing resolution and metric improvement.

### *Strengths*

- **Product strategy:** XEBO.ai is applying AI to help make customer feedback more actionable. Among its AI capabilities are Text Genie, an engine that identifies irregular feedback patterns, and a co-pilot that can automatically build journey maps to rapidly identify key pain points.
- **High-touch global support:** The vendor offers 24/7 international technical support. For strategic accounts requiring comprehensive assistance, it provides resident engineers located at the customer's site to manage high-touch program implementation and ongoing strategy.

- **Middle East support:** XEBO.ai has significant contracts in the Middle East due to its platform's native support for Arabic, including its UI, NLP and LLM models, on-premises and cloud hosting models, and regulatory compliance (e.g., Personal Data Protection Law). Its GTM approach is tailored to include strategic partners with local resources.

### *Cautions*

- **Service delivery model:** XEBO.ai relies heavily on partners for delivery in new regions. While scalable, this strategy can lead to inconsistencies in service delivery and implementation quality compared to vendors who maintain strict control over the customer life cycle through in-house professional services.
- **Contact center support:** The platform currently lacks native voice-based call center analytics, instead relying on third-party partners or structured text exports. Prospective customers requiring deep tonal analysis and speech-to-text capabilities should verify the stability of these integrations and the timeline for planned in-house enhancements.
- **Market presence:** XEBO.ai is much smaller, with a smaller geographic footprint, and is just starting to build its brand presence compared to Leaders in this research. Prospective customers should evaluate its innovation ability and deployment velocity as it expands its operations into highly competitive markets like North America.

## 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

- Revuze was added to this Magic Quadrant because it met this year's inclusion criteria.

### Dropped

- InMoment was dropped from this Magic Quadrant because it has been acquired and no longer operates separately from Press Ganey Forsta.

## Inclusion and Exclusion Criteria

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

The product must be publicly marketed and sold as a stand-alone product (not requiring buying into a more extensive solution) that clearly aligns it 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:
  - **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. To collect this data, there should be a minimum of three out-of-the-box integrations

with major providers of platforms in the following categories: CRM, ERP and IT service management (ITSM).

- **Analysis and insight:** The solution must be able to:
  - Apply AI to autotag 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, such as regression and conjoint.
  - 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 solution must be able 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).

The VoC product version being evaluated must be generally available as of 3 September 2025.

The VoC product must be in production and used in both B2B and B2C (and/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 or more).

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

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

## 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

**Table 1: Ability to Execute Evaluation Criteria**

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

Source: Gartner (March 2026)

## 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**

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	NotRated
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (March 2026)

# 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 for this market as an additional resource (see [Voice of the Customer Reviews and Ratings](#)).
- **Use case and function requirements:** VoC solutions should provide business value across a broad variety of use cases and functions, such as customer service, sales, marketing, digital commerce and frontline operations. The needs of each participating function should be gathered and the anticipated value and outcomes evaluated to ensure alignment with CX and business objectives and expectations. A representative of each participating function should be involved in the vendor evaluation and decision-making process to ensure functional and use case needs are evaluated.
- **Scope:** Determine the scope by deciding the needs and benefits of aligning the VoC program with other programs as part of a broader enterprise initiative, such as market research, customer success management or employee experience.

- **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 [Develop Evaluation Criteria for a Voice of the Customer Platform](#).
- **Roadmap and innovation:** Ask vendors for their roadmap, including innovation investment plans. Ensure the direction the vendor is headed aligns to your business and CX needs, and doesn't just meet your immediate needs, but will enable you to grow to meet your three-year plan going forward. 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 September 2025 to be considered in our evaluation.

## Market Overview

### Market Trends

#### The AI Vendor-Customer Maturity Gap

Vendors saw a roughly 20% increase in customer usage of AI features between 2024 and 2025, but adoption remains concentrated in specific areas such as feedback summarization, custom reporting and survey creation. AI capabilities like in-platform conversation assistants and dynamic reporting have become standard platform capabilities. Vendors are investing in client adoption, using maturity models and guided workflows. However, most customers' CX programs have not kept pace with vendors' AI advancements and remain largely survey-driven.

#### AI Compliance Risk Shapes Regional Strategies

The pace of AI innovation is outstripping regulatory developments, creating uncertainty for both vendors and customers. Regional differences in privacy regulations, data sovereignty requirements and governance expectations increasingly influence vendor selection criteria.

Organizations now demand clear controls over AI usage, auditability, model explainability and the safe handling of personal data, which is prompting vendors to adapt their roadmaps and administrative tools. Success in this environment also depends on vendors' ability to meet enterprise AI governance standards, which include transparent data handling, granular access controls and compliance-ready deployments.

### **Total Cost of Ownership and ROI Pressures**

With enterprise technology budgets under scrutiny, buyers are consolidating CX tools to gain leverage and achieve economies of scale. There is a growing expectation for platforms to deliver built-in conversational assistants, personalized insights and actionable recommendations that drive tangible business value. Vendors are being challenged to connect CX improvements directly to revenue outcomes, though few have achieved tight integration with financial data so far. The evolution of AI-powered "impact simulations" is expected to enhance the accuracy and relevance of outcome predictions, especially as these tools become linked to real-time financial data.

### **Product and Service Innovation: Synthetic Data and Specialized AI Models**

Innovation in the VoC market is accelerating with the introduction of services such as synthetic data — data that is artificially generated — for market and customer research as well as synthetic panels. These services are still nascent and require customer validation. Most vendors are also training AI models specifically for customer experience use cases (such as feedback interpretation), as well as industry-specific models.

### **Proactive Experience Management Through Automation, Evolving to AI Agents**

The next wave of innovation will be AI experience agents. Today's AI agents can complete simple tasks such as appointment booking and issue resolution, but the trend is toward agents autonomously assessing customer records and executing personalized actions. Agentic AI is transforming the role of experience agents from reactive to proactive, enabling them to anticipate customer needs and act in real time. AI agent orchestration — two or more AI agents working together to collaborate on a series of tasks — will start with an AI assistant and bot-to-bot exchanges for discrete tasks.

Long-term, vendors envision AI-driven CX insights flowing directly into downstream actions — designed, decided and completed by a series of AI agents without manual intervention.

## Market Growth

Vendors in this research showed 22% revenue growth on average in 2025. Following are detailed findings on growth and financials for the market.

### VoC Market Size

Traditional players in the VoC platform market are mature, large providers who primarily serve North American, survey-driven VOC programs and account for 80% of the market revenue. While their growth rates had slowed in 2024, their growth rebounded significantly due to a boost from AI and consumption-based pricing models. Newer providers account for the remaining 20% of revenue in this market and are growing at much faster rates — between 80% and 90%, on average. Their growth rates are driven by maturing VoC programs in Europe and high-growth markets such as the Gulf region.

Gartner estimates the size of the VoC platform market overall at \$8.7 billion in 2024, growing to \$10.6 billion in 2025. These market size figures are calculated based on vendors that offer comprehensive VoC platforms (as defined in this Magic Quadrant) in addition to solutions 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 anticipate the pace of revenue growth to increase for the larger VoC providers as they monetize their AI features, and for revenue growth to slow slightly for the newer and smaller entrants in the 70% to 80% range, down from 90%.

Tailwinds for short-term market growth include:

- A significant uptick in the average selling price — ranging from 70% to 75% as reported by the leaders in this Magic Quadrant — caused by the move to consumption-based pricing models (Press Ganey Forsta alone has retained traditional SaaS tiered pricing, but it is now likely being absorbed by Qualtrics.)
- Some smaller players pursuing product modularity, allowing them to break out and monetize AI-enabled features

- Continued strong demand in regions like the Middle East, where CX programs are rapidly maturing

A midterm headwind putting future market growth at risk comes from very large, mature customers and prospects considering leveraging their AI sophistication and data science expertise to source, aggregate and analyze VoC data in-house. The availability of domain-specific language models speeds these efforts.

A much greater, long-term threat is the rise of AI agents. VoC platform vendors are hoping to move beyond their traditional placement as back-office data managers by positioning themselves as the “customer brain” that feeds data and insights to autonomous agents. They aim to become central to agent-driven workflows and operational decision making. However, this opportunity also brings risk, as CRM, ERP and customer-facing platform vendors could bypass VoC platforms entirely by sourcing native customer signals themselves to empower agentic capabilities.

## Mergers and Acquisitions

Significant consolidation is occurring among leaders in the Magic Quadrant. Qualtrics announced its intention to buy vendor Press Ganey Forsta, which recently acquired InMoment (see [Qualtrics’ Acquisition of Press Ganey Forsta Reshapes VoC Platform Market](#)). This consolidation reduces the number of VoC leaders in the Gartner Magic Quadrant, potentially increasing vendor dependency and limiting negotiation leverage for enterprise buyers. Additional M&A activity in this market was Alchemer’s acquisition of Chatmeter.

## Acronym Key and Glossary Terms

AI	Artificial intelligence
API	Application programming interface
BPO	Business process outsourcing
B2B	Business-to-business

B2B2C	Commerce interentreprises et consommateurs
B2C	Commerce interentreprises (B2CConsommateur)
CATI	Entretien téléphonique assisté par ordinateur
CCaaS	centre de contact en tant que service
CRM	gestion de la relation client
CSM	Gestion de la réussite client
CX	Expérience client
DCS	Service client numérique
DEI	Diversité, équité et inclusion
EX	Expérience des employés
GenAI	IA générative
GTM	Aller au marché
Introduction en bourse	Introduction en bourse
ISV	Éditeur de logiciels indépendant
LLM	Modèle de langage étendu
Fusions et acquisitions	Fusions et acquisitions

MX	Expérience du marché
NLP	Traitement du langage naturel
NPS	Score net de promoteur
OEM	Fabricant d'équipement d'origine
PX	Expérience produit
Recherche et développement	Recherche et développement
PME	petites et moyennes entreprises
données synthétiques	Les données synthétiques sont une catégorie de données générées artificiellement plutôt que obtenues par observation directe du monde réel.
SaaS	Logiciel avec service
UX	expérience utilisateur
VoC	La voix du client
VoE	La voix de l'employé
WEM	Gestion de l'engagement des employés

## ⊕ Preuve

## ⊕ Définitions des critères d'évaluation

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