

# IDC MarketScape: Worldwide Employee Experience for Voice of the Employee 2025 Vendor Assessment

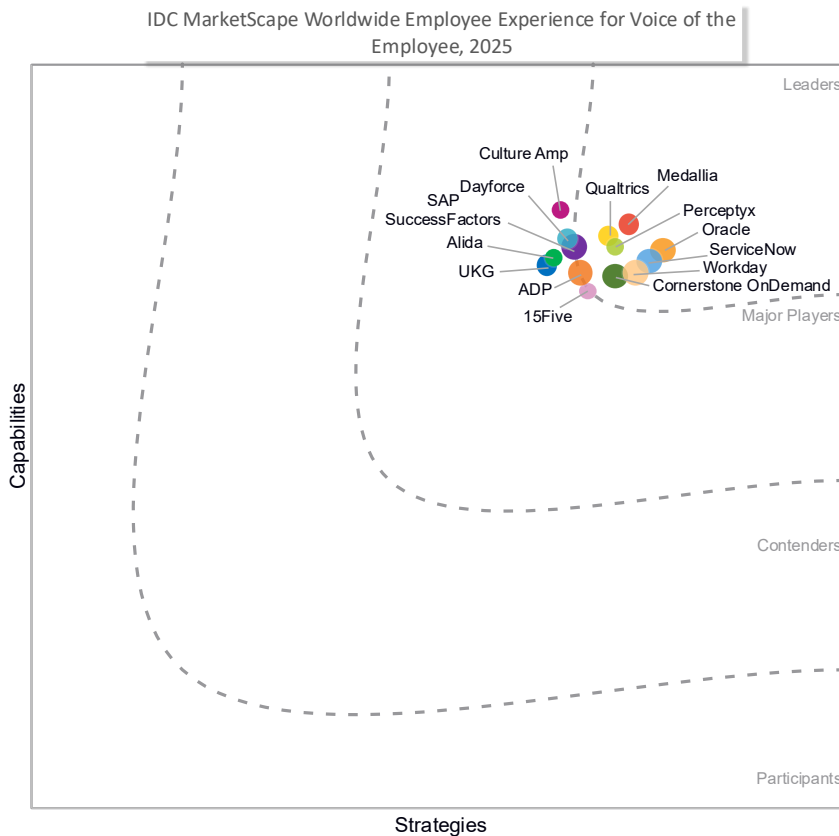
Zachary Chertok

**THIS EXCERPT FEATURES SERVICENOW AS A LEADER**

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Employee Experience for Voice of the Employee Vendor Assessment



Source: IDC, 2025

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

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Employee Experience for Voice of the Employee 2025 Vendor Assessment (Doc # US53672825).

## DC OPINION

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Voice of the employee (VoE) has risen substantially in its value to organizations as the extended value of VoE insights has shifted to impact direct value centers and their support frameworks within organizations. Trending as far back as the end of 2024, IDC data showed that companies were already 97% likely to connect VoE insights to increases in customer satisfaction (CSAT) and 98% likely to connect them to improvements in customer retention. Overall and within the line of business (LOB), organizational leaders were 89% likely to attribute VoE insights capture and influence to measurable improvements in employee performance (source: IDC's *Human Capital Management [HCM] Survey*, August 2024; n = 512).

VoE is quickly progressing beyond its earliest incarnations of employee sentiment surveys and engagement directioning to influence both employee and business performance at a deeper data level. In the process, VoE has increased its breadth to encompass pulse and periodic surveys; AI-personalized survey and question delivery; active, passive, and "always-on" feedback loops; and internalized, directed communications management and adjoining insights extraction. A fully diversified VoE strategy taps into most, if not all, VoE channels to assemble a well-rounded view of what each employee's experience at work is really like.

In the process of data collection, aggregation, analysis, and insights management, IDC has found that more than 50% of HR teams quickly recognize that VoE insights are not limited to aspects of work within the HR remit (source: IDC's *Human Capital Management Survey*, August 2024; n = 512). Employee resourcing trends are making up a significant amount of emerging VoE insights impacting and adjusting how HR tools, data, and resources meet the rest of the organization. Armed with business execution knowledge from the front lines, HR leaders are increasingly partnering with their IT counterparts to channel VoE trends into non-HR decision models and frameworks governed by finance and operations leaders.

Fully integrated VoE insights feeds serve to inform the entire business about what is working and what is not working to support business execution toward goals and objectives and key results (OKRs) targeted by the executive leadership team (ELT). IDC's data shows that while the average office of the CEO is only 21% likely to pursue real-time links between workforce and business performance driven by VoE, the number increases to 88% as companies grow to be digital native, and to 89% if they invest more in AI enablement and a future with digital agency (source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 3*, April 2025; n = 893). Further:

- **Engagement:** In the micro-execution column, VoE insights are critical toward building AI personalization frameworks that better align digitally orchestrated resources in the digital workspace and physical workplace to meet employees where and how they work.
- **Connection:** In the macro-decision column within the organization, strategic, data-led links between the front lines and top-level decision-makers are recodifying connection points between the realities of business execution and how business goals are set, ensuring a fuller realization of what the business is capable of when setting or updating business performance targets.

Orchestrating engagement and connection through strategic and even surreptitiously designed data links forms a foundation for organizationwide AI enablement for a fully assisted future at work. What started out as a desire by HR leaders to drive employee engagement by capitalizing on initial engagement efforts made by LOB managers has evolved into a keystone of business transformation to support individual employee experiences (EXs) and enablement opportunities. VoE sits at the center of the pivot to personalized digital orchestration and is and will be crucial to the future of AI augmentation enablement and digital-human partnerships.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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The vendor inclusion list of the IDC MarketScape for worldwide employee experience for voice of the employee is designed to accurately depict vendors that are representative of:

- The collection and aggregation of VoE data across the full spectrum of VoE channels and modalities
- Extraction of trends and insights from gathered VoE data sets
- Extensibility of both data and extracted trends and insights into broader workforce and business performance frameworks natively or through partners

IDC defines VoE as encompassing all resources that support employers to capture, analyze, report on, and drive resourcing strategies around employee sentiment and

engagement. VoE extends to data capture, VoE analytics and insights native to VoE capture tools, and the integration of VoE insights and data into core HR systems of performance and non-HR systems of operational and financial management including enterprise resource planning (ERP), enterprise finance tools, and customer experience (CX) toolsets. VoE simultaneously enables managers to respond to emerging employee performance risks while serving as a key driver of organizational transformation to reconnect the realities of business execution in the front office to business directive changes architected in the back office and at the executive level.

VoE is used by businesses to assess and understand the characteristics of employee satisfaction (ESAT) as well as gather feedback-based insights around the effectiveness of employee resourcing, enablement, collaboration, communications, and development. Vendors must meet the following inclusion criteria for participation in this IDC MarketScape for worldwide employee experience for voice of the employee:

- Minimum of 250 active customers (corporate entities)
- Global presence operating in two or more regions spanning North America, Europe, and the Asia/Pacific regions
- Be deployed in the cloud as managed hosted private cloud or platform as a service (PaaS)/software as a service (SaaS) in a public cloud with clients in cloud production for at least 12 months
- Market presence and momentum based on IDC inquiry and positive revenue growth
- Produce at least \$10 million in annual software, non-services revenue within the 2024 calendar year prior to the IDC MarketScape evaluation
- Target and scale to meet the needs of organizations supporting 500+ employees with 50%+ of the customer base in this range

## ADVICE FOR TECHNOLOGY BUYERS

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This IDC MarketScape for worldwide employee experience for voice of the employee profiles technology partners that deliver end-to-end VoE capabilities including data capture, insights orchestration, and data and insights framework extensions natively or through partnerships. The focus of this IDC MarketScape is to provide guidance around a host of use cases for VoE while mapping each vendor according to the uniqueness of its point of entry to partnering with its clients and facilitating its solutions. Within the context of partnership, IDC looks closely at market buyer maturity with respect to vendor solution delivery to establish a holistic evaluation that seeks to bring both together.

In reading the IDC MarketScape graphic and consuming the following vendor profiles, it is important to note the differentiation between vendors, their approaches to VoE, and the perceived level of organizational strategy maturity needed to successfully engage and partner with them. While some vendors may show in the "Leader" category within this IDC MarketScape, it is important to recognize that the white space around each vendor corresponds to a perceived level of differentiation, and that being a "leader" does not mean that the vendor will meet every buyer's level of maturity and strategic readiness in the space.

As the vendor profiles will attest, each vendor has a different take on the use cases and benefits of end-to-end VoE capabilities with some providing more directed guidance, others providing more customizable engagements and digital resource instances, and others going deeper into the analytically connected end state beyond employee listening and internal insights management. Something to note, however, is that there are real business benefits to succeeding with a VoE strategy and adjoining digital partnerships, especially when advancing and maturing into an AI-enabled organization:

IDC's data shows that VoE is:

- 98% likely to boost customer retention and engagement
- 97% likely to elevate customer satisfaction based on employee responsiveness
- 93% likely to increase employee satisfaction across the board
- 89% likely to drive stronger workforce performance
- 87% likely to stint high attrition and turnover levels
- 61% likely to drive down performance-related revenue losses

Modern VoE infrastructure, strategies, and programs are about more than assessing and responding to changes in employee sentiment and engagement. As AI models, strategies, assistance, and agency grow, mature, and expand, VoE is right alongside it forming the core of interaction points between and drivers of human-digital interactions. AI models spanning personalization frameworks to full digital agency rely on insights foundations rooted in VoE data to understand the context for what drives employees to perform and align their goals with those of the organization. Contextual understanding helps establish guidance for the core capabilities emerging out of AI frameworks to ensure that resource, tool, application, knowledge, and training delivery properly meet employees where they are while facilitating and moving their flow of work forward toward their goals and task completion.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria

outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

## ServiceNow

ServiceNow is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide for employee experience for voice of the employee. ServiceNow integrates voice of the employee as a core key data source to govern and guide how it personalizes employee experiences. ServiceNow's capabilities for unified portal access to knowledge and resources, AI-personalized workflow management, AI agent orchestration, and human-AI interaction management are all impacted and influenced by VoE alongside other data intake sources.

ServiceNow's capabilities for capturing VoE data and insights are available through Employee Center Pro, which enables organizations to collage real-time feedback via in-page tools, popovers, and actionable emails. Employee Center Pro facilitates immediate insights post-interaction for real-time identification of service gaps to promote continuous improvement.

ServiceNow's capabilities for capturing VoE include:

- **Surveys** within all service towers — HR, IT, facilities, finance, and other service delivery automation — gather employee feedback on various services and processes. Surveys are broader and more scope limited than specialized and integrated EX feedback loops, but they provide a foundational mechanism to assess employee satisfaction for support and enablement at work.
- **ServiceNow Voice for HR** integrates interactive voice response (IVR) and calling experiences within the HR Agent Workspace. ServiceNow Voice for HR enables employees to engage with HR services through voice channels to enhance access and response to HR service delivery.
- **Employee Center** serves as a unified portal where employees can access services, find information, and provide direct feedback. Employee Center consolidates employee interactions in one place making it easier to track use case, process, and resource engagement metadata as well as capture direct feedback across various touch points spanning the employee life cycle.

ServiceNow's AI can be used to process and interpret employee feedback, identify trends, and channel both into nudges, recommended actions, and potential agentic outcomes. AI supports cross-dataset insights to fully contextualize a multidimensional approach to driving the right configured resources, processes, and agent support to the right employees in the right context, through the right modalities, at the right time.

ServiceNow embeds VoE into configured and optimized workflows to facilitate continuous listening and responsive actioning to support employee engagement and to continuously improve support for resource adoption across toolsets that improve productivity and outcomes quality.

ServiceNow integrates with a wide range of HR and non-HR solutions to create a unified platform for how organizations drive resources, automation, and AI assistance, advisory, and agency to every employee across their changing workforces.

## **Strengths**

ServiceNow customers find that they realize significant benefits from channeling ServiceNow's VoE data and insights capture and generation into the solution's broader digital workplace orchestration and personalization framework as well as HR and IT service delivery environments. ServiceNow is not engaged as a traditional VoE provider or specialist, but the insights gathered from its built-in VoE capabilities support the solution's competencies in workflow optimization and employee digital workspace personalization. Customers note that channeling VoE insights and feedback directly into digital orchestration supports immediately actionable outcomes that improve how operational and digital resourcing support and enable collaboration, process management, task management, communications, and progress toward goals and outcomes.

ServiceNow embeds multichannel VoE data collections into its employee portals and native and integrated communications tools to embed VoE capture into the flow of work. Customers commonly follow ServiceNow's guidance to tie VoE outreach to specific moments, events, and targets including IT or HR ticket fulfillment and/or training or task completion. Immediately linked insights tag feedback and sentiment to specific processes for operational completion and fulfillment, guiding business strategy leaders and automated workflow models to improve on pain points without immediately attributing their causes to the workforce.

Customers find that the focus on automated and/or responsive actionable process improvements reduces the likelihood that resolution methodologies further entrench disengagement. At the same time, real-time portal experience improvements across workflows and digital and human troubleshooting boost employees' senses that responsive improvements are taking place in reasonable time frames.

## **Challenges**

ServiceNow customers face challenges when trying to use the solution's VoE capabilities in more traditional manners and in support of dedicated VoE competencies and insights gathering. ServiceNow's VoE capabilities are designed for real-time and facilitated process improvements compared with traditional and specialized VoE

resources that are oriented more toward a deeper state of understanding around workforce performance. Resource centricity for managing employee experience orchestration and personalization is at the heart of ServiceNow's VoE strategy, and customers find that their teams often run into challenges when trying to appropriate ServiceNow's capabilities in more traditional ways.

The nature of ServiceNow's VoE use case specializations also requires customers to be using the broader ServiceNow ecosystem including employee center, HR service delivery, and/or ITSM. ServiceNow's VoE insights are not wholly separable from the core platform and are built around resource and process improvement centricity making any extractable insights difficult to embed in an employee-performance-centric framework. Along these lines, customers find it difficult to integrate VoE specifically with other HCM and EX capabilities as well as use ServiceNow's insights as an insights bridge between workforce and business performance models.

## **Consider ServiceNow When**

ServiceNow for VoE is well suited for enterprise-scale, complex organizations that are already using ServiceNow for HR service delivery, ITSM, and/or digital employee experience (DEX) management. While VoE is not required to optimize ServiceNow, especially for workflow optimization and personalization within DEX, it provides significant value toward automating AI-driven workflow management that conforms employee portals, task management, digital resource orchestration, and more to how employees personally work and the priorities they individually manage.

ServiceNow's VoE is resource and process centric focusing on improving facilitated orchestration across the vendor's three principal areas associated with employee experience. While resource and process centricity may limit the potential for ServiceNow's VoE use cases in employee performance contexts, it is regarded as valuable and recommended toward employee resource and process orchestration and improvement toward more rapid fulfillment of EX transformation leveraging ServiceNow as a strategic orchestration partner. Furthermore, ServiceNow's VoE-backed personalization and response automation capabilities can be extended globally with vendor-managed localization as well as provisioned data governance, security, compliance, and privacy.

As ServiceNow continues to develop its offerings particularly for DEX, the vendor's VoE capabilities are likely to increase in value toward its digital agent orchestration. ServiceNow customers considering the benefits and associated strategies for AI transformation should also consider the vendor's VoE capabilities for building, training, and guiding human-agent interactions centralized in ServiceNow for a future with augmented work.

### Reading an IDC MarketScape Graph

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

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

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. For this IDC MarketScape, vendor size is based on relative revenue scale determined by IDC's 2024 Software Tracker and validated in partnership with each participating vendor. For details regarding the vendors and size of the employee experience market that houses VoE as a core capability, see *IDC Forecast: Employee Experience Management Strategies, 2025–2029* (forthcoming).

### IDC MarketScape Methodology

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

## Market Definition

IDC defines voice of the employee (VoE) as encompassing all resources that support employers to capture, analyze, report on, and drive resourcing strategies around employee sentiment and engagement. VoE extends to data capture, VoE analytics and insights native to VoE capture tools, and the integration of VoE insights and data into core HR systems of performance and non-HR systems of operational and financial management including enterprise resource planning (ERP), enterprise finance tools, and customer experience (CX) toolsets. VoE simultaneously enables managers to respond to emerging employee performance risks while serving as a key driver of organizational transformation to reconnect the realities of business execution in the front office to business directive changes architected in the back office and at the executive level. VoE is used by businesses to assess and understand the characteristics of employee satisfaction as well as gather feedback-based insights around the effectiveness of employee resourcing, enablement, collaboration, communications, and development.

## LEARN MORE

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### Related Research

- *IDC Market Glance: Employee Experience, 2Q24* (IDC #US52313024, June 2024)
- *IDC MarketScape: Worldwide Employee Experience for Employee Voice and Sentiment Data Collection Methods 2023 Vendor Assessment* (IDC #US51428523, December 2023)
- *IDC MarketScape: Worldwide Employee Experience for Integrated Employee Voice with HR and Operational Data 2023 Vendor Assessment* (IDC #US51428623, December 2023)
- *IDC MarketScape: Worldwide Employee Experience 2023 Vendor Assessment — Voice of the Employee and Sentiment Data Collection and Analytics* (IDC #US50732923, June 2023)

### Synopsis

This IDC study for voice of the employee (VoE) profiles technology vendors that provide tools for the collection, aggregation, analysis, and extension of VoE data and insights. Collection channels facilitated by vendors span pulse and periodic surveys; active, passive, and "always on" feedback loops; and communications management capabilities that are manager driven and peer to peer. Behind the scenes, VoE vendors go beyond collection and aggregation to draw real-time insights and trends from the

workforce about the conditions of work execution, characterizing workforce performance trends for organizational responses and supporting individuals to remedy local performance challenges. Modern VoE has expanded beyond the early days of engagement and sentiment capture to form a foundational element of AI enablement strategies that drive personalization into the average work experience. As companies progress through AI maturity toward an agentic future, VoE is and will grow more endemic to the success models and digital resource training that will govern digital-human partnerships in the flow of work.

"The capacity of the VoE market is growing, and with that growth are coming new and deeper insights use cases to track the realities of work experiences into how companies operate, strategize, and make decisions," says Zachary Chertok, senior research manager, Employee Experience at IDC. "What started out as an employee engagement tool has quickly evolved to have foundational relevance toward a future where AI fuses together workforce and business performance models. At the heart of it is infusing business goals with an understanding of what the capacity of the workforce is under a variety of modeled work and enablement conditions. Some organizations are already on the maturity curve toward that future, while a rising number of companies in the waves behind them are recognizing the need to get on board."

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

### Global Headquarters

140 Kendrick Street  
Building B  
Needham, MA 02494  
USA  
508.872.8200  
Twitter: @IDC  
blogs.idc.com  
www.idc.com

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