

Global Voice of Customer (VOC) Market Size Study & Forecast, by Industry Vertical (Retail, Healthcare), Tool Type, Deployment Type (Cloud-based, On-premise), User Type, Device Type and Regional Forecasts 2025-2035

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Abstracts

The Global Voice of Customer (VOC) Market is valued at approximately USD 1.5 billion in 2024 and is projected to expand steadily to USD 3.91 billion by 2035, growing at a CAGR of 9.1% over the forecast period 2025–2035. Voice of Customer platforms are designed to capture, analyze, and operationalize customer feedback across digital and physical touchpoints, thereby allowing enterprises to translate raw sentiment into actionable business intelligence. As organizations increasingly pivot toward customer-centric operating models, VOC solutions are being woven into strategic decision-making, experience management, and brand differentiation initiatives. The market's growth trajectory is underpinned by rapid digital transformation, rising competition across industries, and the need to close feedback loops in real time to sustain customer loyalty and lifetime value.

As enterprises scale omnichannel engagement strategies, the demand for sophisticated VOC tools has accelerated markedly. Businesses are leaning into survey tools, feedback management software, and advanced analytics engines to pick up on evolving customer expectations and pain points before they escalate into churn risks. The integration of artificial intelligence, natural language processing, and sentiment analysis has further pushed the envelope, enabling organizations to move beyond descriptive feedback toward predictive and prescriptive insights. Moreover, the proliferation of smartphones and tablets has amplified the volume and velocity of customer feedback, compelling enterprises to double down on automated, cloud-enabled VOC ecosystems. However, challenges such as data privacy compliance, integration complexity with

legacy systems, and uneven digital maturity across regions continue to temper adoption rates in certain pockets of the market during the 2025–2035 forecast window.

The detailed segments and sub-segments included in the report are:

By Industry Vertical:

Retail

Healthcare

By Tool Type:

Survey Tools

Feedback Management Software

By Deployment Type:

Cloud-based

On-premise

By User Type:

Small and Medium Enterprises (SMEs)

Large Enterprises

By Device Type:

Smartphones

Tablets

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the various segments, large enterprises are expected to dominate the Global Voice of Customer Market over the forecast period. Large organizations, operating across multiple geographies and customer touchpoints, are increasingly rolling out enterprise-grade VOC platforms to harmonize feedback streams and standardize experience metrics. Their higher IT budgets and strategic emphasis on data-driven decision-making allow them to adopt comprehensive, end-to-end VOC solutions that integrate seamlessly with CRM, ERP, and customer experience management systems. While SMEs are gradually catching up—particularly through modular and subscription-based cloud offerings—large enterprises are likely to retain their dominance due to scale advantages and deeper analytical requirements.

From a revenue standpoint, cloud-based VOC solutions currently command the largest share of the market. Cloud deployment models are being favored for their scalability, faster implementation timelines, and lower upfront infrastructure costs, which collectively allow organizations to roll out VOC programs across regions without operational friction. Additionally, cloud platforms enable continuous updates, advanced analytics, and easier integration with third-party applications, making them especially attractive in fast-moving customer experience landscapes. Although on-premise solutions still find relevance in highly regulated environments where data sovereignty is paramount, cloud-based offerings continue to pull ahead in terms of revenue contribution and adoption momentum.

Geographically, North America continues to lead the Global Voice of Customer Market, supported by early technology adoption, a mature customer experience culture, and the strong presence of leading VOC vendors. Enterprises in the region have been quick to double down on advanced analytics and AI-driven feedback systems to differentiate in saturated markets. Europe follows closely, driven by a strong focus on customer satisfaction and compliance-led data governance frameworks. Meanwhile, Asia Pacific is emerging as the fastest-growing region during the forecast period, fueled by rapid digitalization, expanding retail and healthcare sectors, and a burgeoning base of mobile-first consumers in countries such as China and India. Latin America and the Middle East & Africa are also witnessing steady uptake as organizations increasingly wake up to the strategic value of structured customer feedback.

Major market players included in this report are:

Oracle Corporation

Qualtrics International Inc.

Medallia Inc.

Salesforce, Inc.

SAP SE

NICE Ltd.

Verint Systems Inc.

Zendesk, Inc.

InMoment, Inc.

QuestionPro Inc.

HubSpot, Inc.

SurveyMonkey (Momentive Inc.)

Clarabridge (Qualtrics)

Zoho Corporation

Freshworks Inc.

Global Voice of Customer (VOC) Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast their values over the coming decade. The report is structured to blend qualitative insights with quantitative rigor, offering stakeholders a holistic view of the Global Voice of Customer Market. It delves into critical growth drivers, restraints, and emerging opportunities that are set to shape market evolution between 2025 and 2035. Furthermore, the study maps competitive dynamics, product portfolios, and strategic initiatives of key players, while also highlighting micro-market opportunities that investors and decision-makers can tap into as customer experience continues to rise to the top of corporate agendas.

Key Takeaways:

Market estimates and forecasts for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level insights.

Competitive landscape profiling major players and their strategic initiatives.

In-depth assessment of market structure, demand-side, and supply-side dynamics.

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