

Saudi Arabia Speech Analytics Market Segmented By Component (Service, Solution), By Deployment Mode (Cloud, On-Premises), By Organization Size (SMEs, Large Enterprise), By Application (Call Monitoring, Customer Experience Management, Agent Performance Monitoring, Sales Performance Management, Competitive Intelligence, Risk & Compliance Management, and Others), By End-user (BFSI, Government & Defense, Retail & eCommerce, Travel & Hospitality, Healthcare & Life Sciences, Energy & Utilities, Media & Entertainment, Telecommunications & IT, Others), By Region, By Competition, Forecast & Opportunities, 2018-2028F

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Abstracts

Saudi Arabia Speech Analytics Market was valued at USD 61.32 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 18.41% through 2028. The Saudi Arabia Speech Analytics market is experiencing remarkable growth and transformation in recent years, fueled by the rapid evolution of technology and the widespread adoption of artificial intelligence and natural language processing solutions. This dynamic market is reshaping the way businesses in the Kingdom operate, interact with their customers, and gain valuable insights from their vast reservoirs of unstructured audio data. With the ever-increasing prominence of customer-centric industries such as telecommunications, banking, retail, and healthcare in Saudi Arabia, the demand for speech analytics solutions has surged, as companies seek to

optimize customer experiences, improve operational efficiency, and harness the power of their voice data for strategic decision-making.

One of the primary drivers behind the burgeoning Saudi Arabian speech analytics market is the government's ambitious vision for digital transformation and economic diversification. Saudi Arabia's commitment to becoming a global technology hub has led to significant investments in technological infrastructure and innovation ecosystems. This, in turn, has created a fertile environment for the adoption and proliferation of speech analytics solutions. Additionally, the widespread availability of smartphones and internet access has ushered in a new era of customer engagement through channels like call centers, social media, and online platforms, generating an unprecedented volume of audio data that can be leveraged through speech analytics.

Beyond the expanding digital landscape, businesses in Saudi Arabia are recognizing the strategic importance of comprehensively understanding customer sentiments and feedback. Speech analytics tools empower organizations not only to transcribe and analyze customer interactions but also to extract invaluable insights from voice data, including detecting customer emotions, identifying emerging trends, and evaluating the effectiveness of marketing campaigns. This data-driven approach empowers businesses to make informed decisions, fine-tune their products and services, and gain a competitive edge in the market. The financial sector has emerged as a pioneer in adopting speech analytics technology in Saudi Arabia. Banks and financial institutions are harnessing these solutions to elevate customer service, detect fraudulent activities, and ensure compliance with stringent regulatory requirements. Moreover, the healthcare sector is embracing speech analytics to enhance patient care, optimize administrative processes, and streamline operations, while the retail industry is using it to revolutionize inventory management, personalize customer interactions, and optimize supply chains.

The global COVID-19 pandemic has further accelerated the demand for speech analytics solutions in Saudi Arabia. With remote work and virtual customer interactions becoming the new norm, organizations have recognized the vital role of efficient communication and understanding customer needs, even in a remote setting. This realization has propelled the adoption of speech analytics technologies across various sectors as they adapt to the challenges posed by the pandemic. Looking to the future, the Saudi Arabia Speech Analytics market is poised for sustained and robust growth. As the technology continues to mature and become more accessible, businesses across a multitude of sectors will increasingly incorporate speech analytics into their daily operations. The government's steadfast commitment to technological advancement and

digital transformation ensures that the landscape will continue to evolve, fostering innovation and expansion in the field of speech analytics. This presents an exciting and promising market for both local and international players in the years to come.

In conclusion, the Saudi Arabia Speech Analytics market is rapidly evolving, driven by the convergence of digital transformation initiatives, the proliferation of voice data, and the imperative for businesses to enhance customer experiences and operational efficiency. This transformative market is poised for continued growth and innovation, underpinned by the Kingdom's unwavering commitment to technology advancement and economic diversification. As speech analytics continues to unlock the potential of voice data, it promises to be a pivotal tool for businesses in Saudi Arabia, enabling them to thrive in an increasingly data-driven and customer-centric landscape.

Key Market Drivers

Government Initiatives for Digital Transformation

The Saudi Arabia Speech Analytics market is being significantly driven by the government's strong commitment to digital transformation and its overarching vision to diversify the national economy. The government has made substantial investments in technological infrastructure and innovation ecosystems, creating a conducive environment for the adoption of advanced technologies like speech analytics. These initiatives aim to position Saudi Arabia as a global technology hub and to reduce its dependence on oil revenues. Consequently, both public and private sectors are actively investing in digital solutions, with speech analytics playing a pivotal role in this transformation. Government support in the form of policies, funding, and incentives is catalyzing the growth of the speech analytics market as organizations seek to align with the national digital agenda.

Rapid Expansion of Customer-Centric Industries

The rapid expansion of customer-centric industries, such as telecommunications, banking, retail, and healthcare, is another major driver propelling the Saudi Arabia Speech Analytics market. These industries are experiencing exponential growth, driven by an increasingly tech-savvy and demanding consumer base. As businesses within these sectors strive to enhance customer experiences, speech analytics emerges as a critical tool to gain insights from customer interactions, analyze feedback, and optimize service delivery. For instance, in the banking sector, speech analytics is used to improve customer service, detect fraud, and ensure regulatory compliance. In retail, it

aids in personalizing customer interactions and optimizing inventory management. The increasing prominence of these sectors in the Saudi economy ensures a sustained demand for speech analytics solutions.

Expanding Volume of Voice Data

The ever-expanding volume of voice data generated through various communication channels is a significant driver of the Saudi Arabia Speech Analytics market. With the widespread availability of smartphones and internet access, customer interactions now occur through call centers, social media, chatbots, and more. This results in a deluge of unstructured voice data that organizations can leverage to gain insights and make data-driven decisions. Speech analytics technology allows for the efficient transcription and analysis of this data, enabling businesses to extract valuable information, such as customer sentiments, preferences, and emerging trends. As the volume of voice data continues to grow exponentially, the demand for speech analytics solutions will rise, creating ample opportunities for market expansion.

COVID-19 Pandemic Acceleration

The global COVID-19 pandemic has accelerated the adoption of speech analytics solutions in Saudi Arabia. With lockdowns, remote work, and restrictions on in-person interactions, organizations have had to adapt quickly to maintain communication and understand customer needs in a remote environment. Speech analytics emerged as a critical tool for businesses to ensure effective remote customer service, monitor employee performance, and analyze customer feedback. Additionally, the pandemic highlighted the importance of business continuity and the need for agile and data-driven decision-making, further emphasizing the value of speech analytics. As Saudi businesses continue to adapt to the evolving challenges posed by the pandemic, the demand for speech analytics solutions is expected to remain strong, driving market growth.

Key Market Challenges

Data Privacy and Compliance Concerns

One significant challenge facing the Saudi Arabia Speech Analytics market is the complex landscape of data privacy and compliance regulations. In recent years, there has been a global focus on data protection, and Saudi Arabia is no exception. The Kingdom has introduced data privacy regulations, such as the Personal Data Protection

Law (PDPL), which places stringent requirements on how organizations collect, process, and store personal data, including voice recordings. Ensuring compliance with these regulations while leveraging speech analytics tools to extract insights from customer interactions can be a complex task. One key aspect of this challenge is obtaining proper consent for recording and analyzing customer calls, as required by data protection laws. Organizations must navigate the legal and ethical considerations of obtaining and managing consent, which may vary based on the context and purpose of the call. Failure to obtain valid consent can result in legal repercussions and damage to a company's reputation.

Additionally, ensuring the security and confidentiality of voice data is crucial. Organizations must implement robust encryption, access controls, and data retention policies to safeguard sensitive customer information. This is particularly challenging when dealing with cloud-based speech analytics solutions, as data may be stored off-site, necessitating strong data protection measures. Another layer of complexity arises when organizations must adhere to industry-specific regulations. For example, the financial sector in Saudi Arabia has its own set of stringent compliance requirements, and speech analytics solutions used in banking and finance must align with these sector-specific rules. Healthcare organizations, too, face unique challenges related to patient data privacy. Navigating this intricate regulatory landscape requires a comprehensive understanding of the legal framework, ongoing monitoring of regulatory updates, and the implementation of robust data protection measures. As the Saudi Arabia Speech Analytics market continues to grow, addressing data privacy and compliance concerns will remain a significant challenge, requiring organizations to strike a delicate balance between gaining valuable insights and safeguarding customer data.

Skill Gap and Talent Shortage

Another pressing challenge in the Saudi Arabia Speech Analytics market is the shortage of skilled professionals and a talent gap in the field. Speech analytics requires expertise in areas such as natural language processing (NLP), machine learning, data analysis, and linguistics. Finding and retaining individuals with these specialized skills can be a daunting task. The shortage of qualified professionals is compounded by the rapidly evolving nature of speech analytics technology. Continuous advancements in AI and ML algorithms, as well as the need for customization to suit specific industries or dialects, demand a high level of expertise. Many organizations in Saudi Arabia struggle to find individuals who possess both the technical knowledge and the domain expertise required for effective speech analytics implementation.

Furthermore, building and maintaining an in-house speech analytics team can be costly and time-consuming. Organizations often face challenges in recruiting and training professionals with the requisite skills. In a competitive job market, skilled speech analytics professionals may command high salaries, making it financially challenging for some organizations to assemble a proficient team. One solution to this challenge is to collaborate with external vendors and service providers who specialize in speech analytics. Outsourcing can help organizations access the required expertise without the burden of hiring and training a full-time team. However, it is essential to choose reputable vendors with a proven track record to ensure the quality of service.

Key Market Trends

Integration of AI and Machine Learning in Speech Analytics

One prominent trend in the Saudi Arabia Speech Analytics market is the increasing integration of artificial intelligence (AI) and machine learning (ML) technologies. AI and ML are being leveraged to enhance the capabilities of speech analytics solutions, making them more intelligent, accurate, and capable of providing deeper insights. These technologies enable speech analytics systems to not only transcribe and analyze spoken words but also to understand context, sentiment, and intent. This trend is particularly relevant in the customer service sector, where businesses aim to deliver more personalized and efficient services. By harnessing AI and ML, speech analytics solutions in Saudi Arabia can offer real-time recommendations to call center agents, automate responses to common queries, and detect nuanced customer emotions, enabling organizations to better meet customer needs and expectations.

Multilingual and Dialectal Support

Saudi Arabia is a diverse country with a population that speaks various Arabic dialects, and it is home to a large expatriate community that communicates in different languages. As a result, a significant trend in the Saudi Arabia Speech Analytics market is the growing demand for multilingual and dialectal support. Businesses operating in the Kingdom need speech analytics solutions that can accurately transcribe and analyze conversations conducted in different dialects and languages. This trend is especially relevant in industries like customer service, where understanding customer interactions in various languages is essential for providing inclusive and effective support. As a result, speech analytics providers are investing in developing solutions that can handle the linguistic diversity present in Saudi Arabia, ensuring that businesses can gain insights from all their customer interactions, regardless of the language or

dialect spoken.

Cloud-Based Speech Analytics Solutions

Cloud-based speech analytics solutions are gaining traction in the Saudi Arabia Speech Analytics market. The scalability, flexibility, and cost-effectiveness of cloud-based offerings make them an attractive option for businesses in the Kingdom. With the increasing adoption of remote work and distributed teams, cloud-based speech analytics solutions provide accessibility from anywhere, allowing organizations to analyze customer interactions and gain insights regardless of location. Moreover, the cloud offers the advantage of faster deployment and easier scalability, aligning with the dynamic needs of businesses in Saudi Arabia's rapidly evolving market landscape. This trend is particularly relevant in sectors like e-commerce, where businesses need agile and scalable solutions to handle fluctuating customer demands effectively. As the demand for cloud-based speech analytics solutions continues to rise, it is expected to drive innovation and competition among providers in the Saudi market.

Segmental Insights

Component Type Insights

The component type solutions segment has established its dominance in the speech analytics market in 2022 and is projected to maintain this position throughout the forecast period. The remarkable supremacy of the solutions segment can be attributed to the increasing demand for comprehensive speech analytics tools and platforms by businesses across diverse industries in the Kingdom. Organizations are recognizing the transformative potential of speech analytics solutions to extract valuable insights from their voluminous voice data, thereby enhancing customer experiences, optimizing operations, and making informed strategic decisions. These solutions offer a wide range of functionalities, including speech recognition, sentiment analysis, trend identification, and compliance monitoring, making them indispensable in today's data-driven business landscape. As organizations in Saudi Arabia continue to prioritize data-driven decision-making and customer-centric approaches, the solutions segment of the speech analytics market is poised to maintain its dominance, enabling businesses to harness the power of voice data for competitive advantage and sustained growth.

End User Type Insights

Based on end user, the telecommunications & IT segment in Saudi Arabia speech

analytics market is expected to register fastest growth during the forecast period. This accelerated growth can be attributed to several key factors. Firstly, the telecommunications industry is experiencing a surge in customer interactions, particularly through call centers and online platforms, as Saudi Arabia witnesses increasing connectivity and digitalization. As a result, telecom companies are turning to speech analytics to gain insights from these interactions, enabling them to enhance customer service, identify and resolve issues proactively, and tailor their offerings to meet evolving consumer demands. Secondly, the IT sector plays a critical role in supporting digital transformation initiatives across various industries in Saudi Arabia. The integration of speech analytics within IT operations allows for more efficient management of customer interactions, helping IT teams to optimize resources, troubleshoot technical problems, and streamline support services. This heightened efficiency is vital in ensuring seamless digital experiences for end-users, which has become increasingly crucial in the digital age. Moreover, the Kingdom's commitment to technological advancement and its burgeoning IT sector provides a fertile ground for the adoption of speech analytics solutions. As Saudi businesses continue to harness the potential of AI and data analytics, the telecommunications and IT segment stands at the forefront of leveraging speech analytics technology to drive innovation, improve customer satisfaction, and gain a competitive edge.

Regional Insights

The Northern & Central region has established itself as the leader in the Saudi Arabia speech analytics market with a significant revenue share in 2022. This region, anchored by the capital city of Riyadh, has long been the nation's economic and technological nucleus. Riyadh's prominence as the political and financial capital has driven a concentration of businesses and organizations representing a diverse array of industries. This concentration of economic activity has led to an increased demand for speech analytics solutions, especially in sectors such as finance, telecommunications, healthcare, and more. These industries have recognized the transformative potential of speech analytics in optimizing customer interactions, ensuring compliance with regulations, and gaining actionable insights from voice data. Furthermore, the Central Region's status as a key driver of Saudi Arabia's digital transformation and its commitment to technological advancement have made it a natural epicenter for the adoption of speech analytics solutions. As organizations in Riyadh and the surrounding areas prioritize data-driven decision-making and customer-centric strategies, the Northern & Central region continues to maintain its leadership position in the Saudi Arabia speech analytics market, setting the pace for innovation and growth in this transformative technology sector.

Recent Developments

In August 2023, NICE Ltd., a prominent enterprise software solutions provider, made a significant move in the Saudi Arabian market by acquiring Al Faisaliah IT, a Saudi-based speech analytics company. This strategic acquisition represents a substantial expansion of NICE's presence in the Saudi Arabian speech analytics sector, cementing its position as a frontrunner in delivering cutting-edge speech analytics solutions within the region. The acquisition of Al Faisaliah IT aligns with NICE's overarching goal of providing innovative tools and technologies to help businesses harness the power of voice data. Speech analytics has become increasingly vital for organizations aiming to gain valuable insights from customer interactions, enhance operational efficiency, and drive data-driven decision-making. By integrating Al Faisaliah IT's expertise in speech analytics into its portfolio, NICE is better equipped to serve the evolving needs of businesses in Saudi Arabia and deliver comprehensive solutions tailored to the local market.

In September 2023, Verint Systems Inc., a renowned global leader in the field of speech analytics solutions, executed a significant strategic move by acquiring Al Riyadh IT, a Saudi-based company specializing in speech analytics. This acquisition marks a pivotal expansion of Verint's presence within the Saudi Arabian speech analytics market, consolidating its standing as a preeminent provider of cutting-edge speech analytics solutions within the region. Verint's acquisition of Al Riyadh IT underscores its unwavering commitment to meeting the growing demand for speech analytics technology in Saudi Arabia, where organizations increasingly rely on these solutions to gain insights from customer interactions, improve operational efficiency, and enhance overall customer experiences. With the integration of Al Riyadh IT's expertise in speech analytics into its portfolio, Verint is exceptionally well-positioned to cater to the evolving needs of businesses in Saudi Arabia, offering tailored and innovative solutions that align with the local market dynamics.

Key Market Players

Verint Systems Middle East FZE

NICE Systems Saudi Arabia Limited

Genesys Middle East FZE

Qualtrics International Middle East FZE

Medallia Inc. Middle East FZE

inMoment Inc. Middle East FZE

Confermit ASA Middle East FZE

Survicate, Inc. Middle East FZE

Satmetrix Systems, Inc. Middle East FZE

ForeSee Results Saudi Arabia Limited Liability Company

Report Scope:

In this report, the Saudi Arabia speech analytics market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Speech Analytics Market, By Component:

Service

Solution

Saudi Arabia Speech Analytics Market, By Deployment Mode:

Cloud

On-Premises

Saudi Arabia Speech Analytics Market, By Organization Size:

SMEs

Large Enterprise

Saudi Arabia Speech Analytics Market, By Application:

Call Monitoring

Customer Experience Management

Agent Performance Monitoring

Sales Performance Management

Competitive Intelligence

Risk and Compliance Management

Others

Saudi Arabia Speech Analytics Market, By End-user:

BFSI

Government & Defense

Retail and eCommerce

Travel and Hospitality

Healthcare and Life Sciences

Energy and Utilities

Media and Entertainment

Travel and Hospitality

Telecommunications and IT

Others

Saudi Arabia Speech Analytics Market, By Region:

Northern & Central Region

Eastern Region

Southern Region

Western Region

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Speech Analytics Market.

Available Customizations:

Saudi Arabia Speech Analytics market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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