

IDC MarketScape: Worldwide Conversational AI Platforms for Front-Office Use Cases 2025–2026 Vendor Assessment

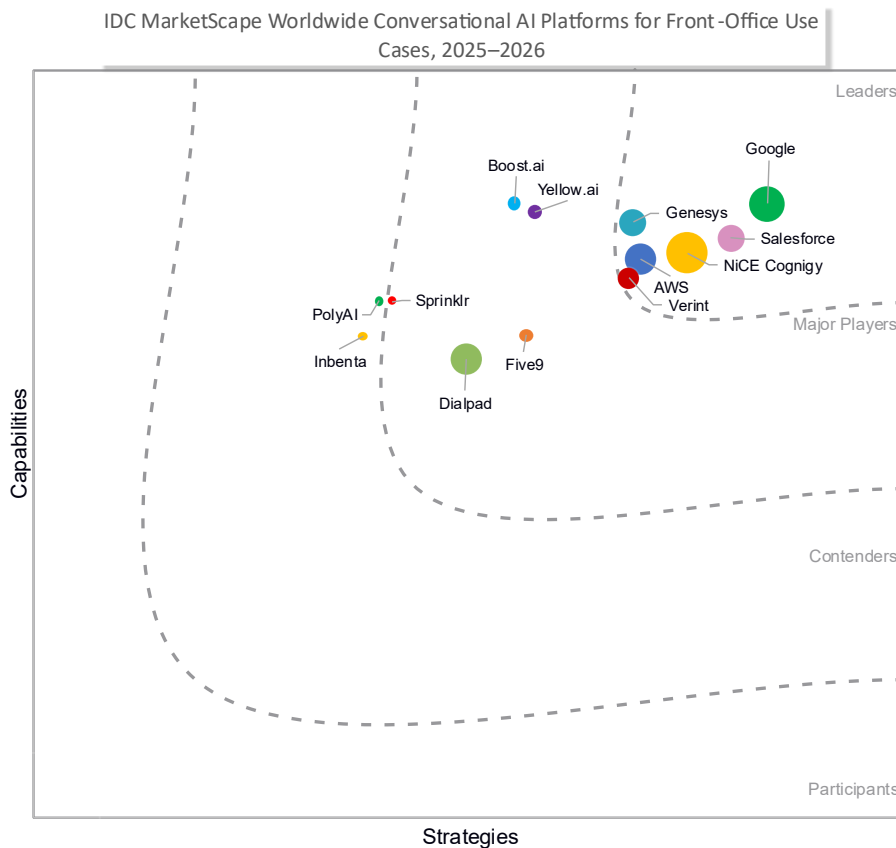
Hayley Sutherland

THIS EXCERPT FEATURES GOOGLE AS A LEADER

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Worldwide Conversational AI Platforms for Front-Office Use Cases Vendor Assessment



Source: IDC, 2025

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Conversational AI Platforms for Front-Office Use Cases 2025–2026 Vendor Assessment (Doc # US53866226).

IDC OPINION

This is the second iteration of the IDC MarketScape for worldwide conversational AI (CAI) platforms for front-office use cases, occurring biannually since 2023. While a similar IDC MarketScape in 2021 focused on customer service use cases, based on market demand and vendor offerings, this document is expanded to focus more broadly on front-office use cases, including not just customer support but also sales and marketing. Over the past three to four years, IDC has seen vendors continue to expand their conversational AI platform offerings to support this wider variety of front-office use cases, adding to customer support self-service and customer service agent assist with specialized capabilities for marketing outreach, lead scoring, and real-time sales agent assistance. As a result, support for a variety of front-office use cases (customer service, sales, and/or marketing) was an important factor for this year's evaluation.

As with other areas of AI-driven software, this market has seen fast-paced adoption, major acquisitions, and groundbreaking innovations from long-standing incumbents, hyperscalers, and start-ups alike. As these new innovations make their way from open source and free consumer tools into enterprise-grade features and products, business and IT leaders have had to rapidly evolve their expectations, expertise, and standards around AI, including connecting the dots between IT requirements, high-profile technical advances, and measurable business outcomes.

This is a dynamic market, and front-office-focused conversational AI offerings are constantly evolving. Most recently, many of these systems are leveraging the latest innovations in generative large language models (LLMs) and other foundation models, as well as agentic capabilities like enhanced planning, perception, tool calling, and memory. These technologies are greatly improving capabilities such as accurate research assistance and workflow completion and moving CAI systems toward advanced reasoning and autonomy. IDC expects integrations with systems of record/databases to support question answering, as well as with different interaction channels, applications, data formats, and AI systems, to be increasingly important in

this market. However, AI is still not a "magic button," and many organizations are currently reckoning with infrastructure, data and knowledge management, and technical debt overhauls to make their business "AI ready." Increasingly, organizations are looking for vendors to provide tools, services, and educational resources to assist with key elements of AI success. These can include "universities" to help with platform usage, data/metadata prep algorithms, maturity models and use case road maps, best practices, and tools for converting previous generations of conversational AI/chatbots into ones that leverage the latest forms of advanced AI. The most important aspect is for technology buyers to feel that their AI vendor is a true partner that can integrate into and even help codevelop their AI strategy.

Other factors that rose in importance this year included no-code customization and development capabilities, which have now become common and expected, particularly with natural language coding capabilities; increased support for voice channels, including speech-to-speech translation; the flexibility for organizations to connect their own LLM licenses and other AI applications to conversational AI systems; and the ability to orchestrate multiagent workflows. As organizations look ahead, they also need to prepare for a future that requires them to manage these multiagent workflows across various functional areas and business applications, and even from different vendors. While protocols like A2A and MCP are still emerging, it will be important for buyers to understand potential vendors' strategies for key issues like interoperability, data connectivity, and data privacy/security in a multiagent setting.

As AI innovations rapidly advance the capabilities and expectations for customer experiences, technology and business leaders must keep a close eye on this shifting landscape, work to cut through the hype, and determine which AI use cases and features are most important for their organization.

They must do this while reducing IT costs and preparing the business and its technology for greater use of AI. This IDC MarketScape evaluation of conversational AI platforms for front-office use cases should help such leaders gain valuable insight into what is available in the market today, as well as help inform longer-term strategies.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The goal of this IDC MarketScape project is to assess vendors with notable capability and market share in the conversational AI space with the following criteria to guide inclusion:

- The offering should be commercially available for use as a product or product suite and purchased by customers for all of calendar year 2024. IDC will also consider new product features and capabilities introduced throughout calendar

year 2025 as part of vendor strategy evaluation. In addition, IDC will consider these features as part of its capabilities evaluation if there is sufficient customer adoption and use for IDC to properly evaluate them and if these features are generally available to all customers at the time of document publication.

- The product must meet IDC's definition for conversational AI software platforms and provide the capabilities for developing, training, and deploying conversational AI algorithms and workflows that organizations can use standalone and/or can also include in their enterprise applications. This includes, but is not limited to, conversational AI solutions that leverage generative AI (GenAI) and agentic AI technologies.
- The product must have at least 100 paying customers and at least \$10 million in revenue in CY24.
- The product must be offered, supported, and available on a worldwide basis (customers and sales/support offices in North America and at least 2 other global regions).
- The product must be all or mostly the vendor's own IP.
- The product must have a B2B business model (i.e., this excludes vendors primarily focused on a B2C/direct-to-consumer model).
- The offering must have the ability to support, and a reasonable level of customer deployment in, a variety of front-office use cases (e.g., customer service, sales, and marketing).

ADVICE FOR TECHNOLOGY BUYERS

IDC offers the following advice for technology buyers considering conversational AI software for front-office use cases such as customer service, sales, and/or marketing:

- **Assess your data readiness.** Develop a clear and complete picture of accuracy, freshness, and other aspects like data sources and classification models. Examine metadata models, as well as knowledge management/organization principles such as taxonomies, ontologies, and knowledge graphs, and determine if additional work will be needed to prep data and knowledge sources for AI.
- **Create centers of excellence (COEs).** Use COEs to help establish and maintain AI governance and use policies, gather and evangelize best practices, and assist with use case alignment and cross-functional coordination. This can help ensure not just responsible but also valuable use of AI across the organization.
- **Assess vendor security and privacy.** Data security and privacy concerns are a top barrier to the adoption and expansion of advanced forms of AI. Ensure data governance and business rules, such as access permissions, are maintained and

that the AI system has strong, explainable guardrails, and that these meet your organization's ethics standards and/or compliance requirements.

- **Align AI investments to IT, GTM, and product strategy.** Understand the different capabilities and use cases for advanced AI, and prioritize investments based on overall impact and alignment. Leverage maturity and use case selection road map models and work with IT and business leaders in your organization to build your own road map for adopting and expanding advanced AI. For front-office use cases, carefully consider the different areas of the customer experience, which use cases you may want to support on the same platform, and how you will connect data between customer service, sales, and marketing. Further, consider how you will bring in back-office functions and data that can also impact the customer experience.
- **Leverage IDC's four-pillar methodology to develop your CAI use case road map.** IDC recommends focusing on four key pillars for AI use case selection: *value, feasibility, responsibility, and expandability* (see *Leveraging Advanced AI: A Framework for Conversational AI Use Case Selection*, IDC #US50013823, September 2025). By using this methodology, organizations can weave together tactical and strategic plans for AI to develop a use case road map that ensures value across the business.

VENDOR SUMMARY PROFILE

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.

Google

After a thorough evaluation of Google's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025–2026 IDC MarketScape for worldwide conversational AI platforms for front-office use cases.

Google provides cloud computing, AI, online advertising, a search engine, and other software, including conversational AI. Its core conversational AI product, Conversational Agents, is part of the Customer Engagement Suite with Google AI, which provides conversational self-service, agent assistance, and operational insights for customer experiences. Conversational Agents include capabilities for building text- and voice-based multimodal virtual agents, with a strong emphasis on no-code development to speed the production of hybrid agents (GenAI + deterministic AI). It also includes HD voice models; out-of-the-box connectors for data sources such as BigQuery, Salesforce, SharePoint, Jira, and ServiceNow; and prebuilt agents for common use cases such as

flight booking, movie ticketing, shopping assistance, and appointment booking, which integrate directly with Google products such as BigQuery and Google Calendar.

Google is a public company. It is headquartered in Mountain View, California, with over 100 other offices worldwide.

Quick Facts

- **Year founded:** 1998
- **Total number of employees:** 185,700+ (Google overall, not broken out for conversational AI offering)
- **Offering name:** Customer Engagement Suite with Google AI
- **GA date:** April 17, 2018
- **Industry focus:** Customer Engagement Suite with Google AI supports a wide variety of industries, with prebuilt components and offerings specialized for use cases within automotive, retail/ecommerce, foodservice, travel and hospitality, government and public sector, media, banking, healthcare, and telecommunications.
- **Use case support:** Customer Engagement Suite with Google AI supports a wide range of front-office use cases, from customer self-service and customer support agent assist to sales agent assist and presales/marketing.
- **Deployment infrastructure options:** Customer Engagement Suite with Google AI is primarily deployed via public SaaS cloud on Google Cloud, with some on-premises and private cloud (customer-managed) instances supported on a case-by-case basis.
- **Deployment/management mode options:** Google Customer Engagement Suite is available as a cloud-based software product that includes development tools that can be used by clients.
- **Pricing model:** Conversational Agents are priced on a consumption basis, charged per second (voice) or per request/query (chat). Standard and enterprise pricing tiers are offered. All maintenance costs are incorporated within the base license fee.

Advanced AI Approach and Features

- **LLM options:** Conversational Agents can leverage any foundation model in the Google Vertex AI Model Garden, optimized per use case, including Google's proprietary models such as the Gemini family of models.
- **AI customizability:** Conversational Agents is designed to be used by a variety of enterprise users. Developers can build Conversational Agents on ADK with full customization, while Conversational Agents within Customer Engagement Suite

are designed to serve low/no code needs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, multiagent scenarios, and converting previous generations of bots into GenAI-based assistants or AI agents.

- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** The currently GA prebuilt features leveraging generative and/or agentic AI are powered by Google's proprietary Gemini models by default. They include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; dialog summarization; automated testing; task automation; unstructured data vectorization/embedding; and GenAI-powered agent assist. Google's well-known search capabilities underpin question answering, other RAG-supported AI features, and other proprietary Google AI models that power aspects such as real-time translation, realistic text-to-voice generation, scenario-based evaluations, voices with dynamic and on-the-fly controls, and multimodal experiences for both chat and voice.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** These include improved voice quality, AI augmented agent building, declarative UI for determinism in next-gen agents, voice evaluations, and additional tools and integrations.

Strengths

- **Research and development:** With its extensive research into deep learning-based language models and other technologies such as speech recognition and machine translation, Google has been at the forefront of AI and ML advances affecting conversational AI for many years now. Every year, Google publishes dozens of papers and reports in this area, helping advance the overall art and science of conversational AI. Google has rapidly adapted to changing market conditions around GenAI and agentic AI, and that is largely due to its ongoing R&D capabilities.
- **User training and documentation:** While Google has traditionally been viewed as a professional developer-focused vendor, it has been working hard in recent years to expand offerings for nontechnical business users. Customers recently praised the ease of use of the Google CES UI, as well as the ease of training/upskilling employees. They reported a wealth of training content and clear documentation that doesn't require deep technical knowledge.

Challenges

- **Highly competitive market:** While Google continues to build on a strong technical underpinning, the global market has become highly competitive in the past few years, with dozens, if not hundreds, of companies vying for mindshare and wallet share. Meanwhile, the latest wave of AI innovations will level certain playing fields while spurring new entrants to the market. Google should ensure that it is providing support to help its customers succeed with conversational AI, in addition to strong thought leadership.
- **Promoting ease of use in AI offerings:** Google has been expanding its GenAI conversational app builder tool — as well as industry- and use case-specific templates for certain areas — to enable more companies to take advantage of its AI. However, many organizations still view Google as primarily providing a developer-first platform. Google should ensure that it is promoting low- and no-code tools sufficiently to overcome this perception.

Consider Google When

Consider Google if you are an organization looking for a deep and broad set of multilingual conversational AI capabilities that can be used to develop a wide range of front-office conversational AI solutions, built on a foundation of advanced AI R&D. Google offers a variety of options for professional developers to build and customize LLMs, AI agents, and other AI foundation models, but it has also been rapidly expanding and strengthening low- and no-code capabilities to enable more enterprises with fewer development resources to leverage AI in the Customer Engagement Suite with Google AI.

APPENDIX

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.

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 the conversational artificial intelligence (AI) market as products/services that are used to develop conversational AI solutions, like chatbots, digital assistants, or voice assistants, which users can talk to. They use data, automatic speech recognition, text to speech, machine learning, natural language processing, and natural language generation to carry on conversations and perform actions that imitate human interactions, recognizing speech and text inputs across various languages. Increasingly, conversational AI solutions leverage advanced and emerging AI technologies such as generative AI and agentic AI to expand conversational and task automation capabilities. This document focuses on conversational AI for front-office use cases (e.g., customer service, sales, and/or marketing).

Related Research

- *IDC FutureScape: Worldwide Agentic Experience Orchestration 2026 Predictions* (IDC #US53858625, October 2025)
- *Market Analysis Perspective: Worldwide Conversational AI Tools and Technologies, 2025* (IDC #US53160825, October 2025)
- *IDC MarketScape: Worldwide General-Purpose Conversational AI Platforms 2025 Vendor Assessment* (IDC #US52972625, September 2025)
- *Leveraging Advanced AI: A Framework for AI Use Case Selection* (IDC #US50013823, September 2025)
- *NiCE Announces Agreement to Acquire Cognigy, Advancing Conversational AI and Analytics Capabilities for CX* (IDC #lcUS53725225, August 2025)
- *IDC Market Glance: Agentic AI Applications, Tools, and Technologies, 2Q25* (IDC #US53565925, June 2025)

Synopsis

This IDC study represents a vendor assessment of the conversational AI platforms for front-office use cases market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that provide guidance about front-office-focused conversational AI platform vendors and their offerings. This IDC MarketScape covers a variety of vendors participating in the market and focused on providing platforms that can provide conversational AI solutions, including AI assistants, copilots, and agents, for a wide variety of front-office use cases and communication channels. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"Over the past three to four years, IDC has seen vendors continue to expand their conversational AI platform offerings to support a wider variety of front-office use cases, adding to customer support self-service and customer service agent assist with specialized capabilities for marketing outreach, lead scoring, and real-time sales agent assistance," said Hayley Sutherland, research manager, Conversational AI at IDC. "This IDC MarketScape evaluation of conversational AI platforms for front-office use cases should help business and IT leaders gain valuable insight into what is available in the market today, as well as help inform longer-term strategies."

ABOUT IDC

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

Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/about/worldwideoffices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.