



Omdia Market Radar: AI-enabled Experience Management Platforms

Summary

Catalyst

While most CEOs recognize the importance of delivering a positive customer experience, they are less certain about the means and what needs to be fixed. The fundamental challenge facing every company is how to remain relevant to customers and keep them coming back for more in an environment of accelerating change and rising expectations.

No business operates in a vacuum, and the ultimate judge of performance is the customer, who increasingly does not separate the product purchased from the overall experience. While a consumer may rationalize the buying decision, it is often his or her feelings and emotions that tip the scale in favor of a purchase. Common KPIs like the NPS, CSAT, and customer effort score (CES) indicate the quality of the customer experience (CX). However, they fall short of revealing the emotional drivers behind the scores and provide limited context. Informative feedback loops are required to help enterprises refine the customer experience and gain insights for product development.

For large enterprises, whether they are engaged in B2B, B2C, or B2B2C, developing effective feedback mechanisms, sometimes involving millions of daily interactions across multiple channels and journeys, is a significant challenge. This report explores nine of the more advanced enterprise feedback management platforms (EFM) for addressing this challenge. They can be described more accurately as enterprise experience management platforms (EXMs). Survey feedback is still an important sensing mechanism, but these more advanced platforms also provide insights from unsolicited feedback such as third-party reviews or through inferences based on behavioral data and applied AI. Some have evolved over many years through organic development and acquisition, while others entered the market with the explosion of interest in customer experience management, and are making inroads, especially where cost and simplicity are important factors.

Omdia view

Advanced EXM platforms are increasingly seen as vital sensing mechanisms that fulfill several critical and connected purposes.

- Help enterprises fine-tune operations and processes
- Eliminate friction for employees so that they may enhance their abilities and deliver a consistently positive customer experience
- Gain a deeper understanding of customers' expectations and feelings toward the company and its brands
- Reinforce and foster a customer-centric culture

They have evolved significantly in recent years, and when deployed as part of a strategic and holistic approach to the CX they are an essential part of the sensing armory. Most of the vendors included in this report have repositioned their platforms in the experience management space. However, there are many sensing mechanisms for gaining insights from customers and the employees who serve them, as well as from markets. While EXM platforms are a rich source of insight, they should be considered as just one essential tool in a larger toolbox for fine-tuning the customer experience.

Customers provide digital clues. They can be sensed by the more advanced systems of engagement, especially those with embedded AI. (see *Omdia Universe: Customer Engagement Platforms 2020-21* to be published in September 2020, for a thorough analysis of CEPs) Many conversational AI startups have entered the market, providing advanced sentiment analysis and emotion detection.

Customer journey analytics is also a growing area. Some of the most advanced, like Kitewheel and Thunderhead, provide intuitive visualizations of customer journey traffic to help the chief customer officer and CX teams optimize engagement capabilities, especially where sources of friction are detected.

Employees are an essential part of the CX equation and not just their levels of engagement, but also how they get work done. Process mining techniques supported by vendors such as Celonis and Signavio generate data-driven insights into the quality of existing processes and the hidden costs of deviating from the ideal.

AI has been incorporated into all these approaches, and they are converging rapidly on the CX space, with each vendor claiming the high ground for CX management. Competition for AI and automation support in the CX arena is intense, and multiple sensing mechanisms generate insights and prompt employees and team leaders to act.

From an EXM vendor perspective, the threat of disruption has increased, which means they must strive to increase their value through innovation, faster deployment, and improved self-service, while reducing costs.

A thoughtful and well-crafted portfolio approach is optimum for enterprises, because despite claims, no single platform provides the complete picture. Enterprises need to create a highly connected environment of operational and engagement systems supported by an ecosystem of AI and automation. The systems must also synthesize all forms of sensory input so that the enterprise can anticipate and react to change. Fundamental to this aim is the management of data of all forms throughout the enterprise, structured and unstructured, from operational and transactional to interaction and behavioral data. EXM cannot do this alone. It is incumbent on the CEO and leadership teams to support such strategic initiatives, understand the sensing options available, and enhance organizational resilience and adaptability through their judicious use.

The EXM vendors included in this report will continue to provide a valuable approach to sensing and action that helps enterprises close any experience gaps and evolve their customer-centric cultures. Selecting the right vendor will depend on the criteria that are most important to each enterprise. Each vendor in this report is a worthy contender, some covering a wide array of industries while others specialize in a few. Each has a valuable role to play, and every enterprise must consider an advanced EXM platform to be an essential tool for discovering the true voice of the customer, employee, and market.

Key messages

- An EXM platform is an essential closed-loop feedback mechanism for optimizing the customer experience, not simply a platform for surveys.
- The nine EXM platform vendors evaluated in this report met or exceeded the criteria set by Omdia as necessary to support continuous CX improvement.
- Maximum business value is derived when EXM platforms are used across the enterprise to monitor the voice of the customer, employee, and market, and lead to rapid action.

- Silos destroy the CX, and end-to-end systems thinking is required behind a shared strategic purpose to harness the collaborative efforts of employees and deliver a positive CX.
- Enterprises must harness indirect as well as direct feedback to gain the insights they need to enhance the CX and inform product development.
- The Omdia heatmap provides a comparative summary across seventeen attributes and identifies five market leaders, one vertical specialist leader, and three challengers.
- Analysis of each vendor is provided in the section *Vendors on the Omdia Market Radar: AI-enabled Experience Management Platforms*.

Recommendations

Recommendations for enterprises

Any preconception that modern enterprise feedback management platforms are just a means of plugging customers with unwanted surveys is wide of the mark. In this age of big data and reviews of products and experiences on social networks, customer feelings and opinions are scattered far and wide. Picking up these indirect signals and adding them to the often unstructured data gathered through direct means is challenging. Enterprises need a mechanism for consolidating millions of signals and generating insights to drive relevant and rapid action. Each of the vendors in this report has a range of capabilities to meet this challenge. Selecting the right one will depend on such things as industry-specific support, overall functional capabilities, the level of self-service, price sensitivity, experience, and other criteria. A synopsis of each vendor platform is provided later in this report.

Recommendations for EXM vendors

The main challenge facing vendors is to marry increased sophistication and automation with simplicity of use. Omdia recommends a continued focus on AI to deliver and prioritize insights and recommendations for action; make it as easy as possible for the non-technical user to take advantage of the platform, with contextual guidance, and best practices recommendations.

Several of the large CRM/CEP vendors have recently launched voice of the customer applications embedded in their customer engagement platforms. To combat this threat, Omdia suggests deepening the integration with these CEPs so that insights and recommended actions surface in the applications that are more commonly used by the end-user, such as ERP, logistics and supply systems, CRM applications, or contact center support systems; provide a consolidated view of CX signals so that the C-suite members can see where CX is failing and appreciate the value of the EXM platform as a CX guidance system for the entire enterprise.

EXM vendors should demonstrate the advantages of a more methodical and consistent approach and deliver deeper insights and prioritized recommendations that surface in the application dashboards used by the end-user.

Defining and exploring

Definition and characteristics

There are hundreds of customer feedback applications, but of these, only around a dozen are suitable for mid-market and large enterprises with a clear and strategic objective to continuously improve the customer experience. Advanced enterprise feedback management (EFM) platforms have evolved or are morphing into experience management (EXM) platforms, which distinguishes them from ad hoc survey solutions. EXM platforms provide a means to manage and orchestrate continuous CX improvement. While they can be used for ad hoc or traditional bi-annual surveys, like many other survey applications, that is not where their true value lies.

Many enterprises have adopted survey platforms tactically, often sponsored by an individual line of business. Some may even have more than one platform in place. Without some collective focus and purpose, the value to be gained is limited, and certainly not strategic. A common misunderstanding is to see EXM platforms as little more than a mechanism for surveys and aid to analysis. If that were the case, there are scores of cheaper alternatives.

Silos destroy CX by creating barriers to the essential flow of information and insights that enable employees, irrespective of the department, to add value to the customer experience. The CX requires end-to-end systems thinking, where the enterprise as a whole harnesses its unique span of capabilities to achieve a common purpose. It is in this strategic context that advanced EXM platforms come into their own.

Key capabilities

The nine vendors included in this report were selected on the basis that they met the following minimum requirements:

- Provide a unified platform to capture, analyze, and provide automated alerts covering:
 - Voice of the customer (VoC)
 - Voice of the employee (VoE)
 - Voice of the market (VoM) for enterprise reputation capture and analysis and insights for product or services development
- A range of AI capabilities such as natural language processing (NLP) and machine learning (ML) to trigger a relevant response or remedial action
- Derive insights across all customer journeys, not just individual touchpoints
- Omnichannel capable, including mobile and SMS
- Ability to synthesize operational, interaction, and third-party market data to identify any systemic or reputational issues
- Ability to integrate with enterprise systems and provide in-application feedback
- Support KPIs linked to the enterprise' goals to track performance and the business impact of improvements or reverses in customer attitudes towards the organization
- Provide consolidated and role-based dashboards and the ability to drill down to the data
- Data security and privacy compliance
- Suitable for global CX programs evidenced by global enterprise customer examples

- Provide services to help enterprises adopt best practices and take full advantage of the platform

Business value and applications

While individual lines of business can use EXM platforms, their greatest value is when used as an essential sense-and-respond mechanism across the enterprise. *The Service Profit Chain* (Heskett, et. al, 1997) described the causal link between customer and employee satisfaction and how the former is derived from the latter and results in profitable growth. Today many HR departments use employee surveys to determine morale and levels of engagement, but with no explicit linkage to the customer experience. A strategic approach to CX would seek to uncover barriers faced by employees in delivering their best to support customers. Employees often have a visceral sense of the negative impact of poorly designed processes and systems. However, they rarely have a channel through which to promote ideas on how to remove friction or enhance the customer experience, nor do they have the power to make changes. Many organizations have a dysfunctional culture, where employees have to break the rules to meet the needs of the customer. An EXM platform brings these dysfunctions to the surface and to the attention of management.

EXM platforms can also reveal attitudes toward products and brands based on buyer feedback in online marketplaces like Amazon or Alibaba. As CX becomes a critical cross-organizational discipline, the more advanced EXM platforms provide a valuable resource for fostering outside-in thinking, whether as part of a design thinking approach to a product or for experience development.

Market landscape and participants

Market origin and dynamics

EXM platforms have been around for several decades and have undergone a renaissance, as CX has become a priority in boardrooms across the world. The impact of the COVID-19 pandemic has made CEOs in most industries painfully aware of the importance of resilience and adaptability through digital means. The pandemic caused a switch to remote rather than onsite customer interactions, making it essential to monitor the effectiveness of the remote CX. It has also highlighted the importance of systemic thinking about the organization and how it needs to sense and respond to change quickly. Continuous and systemic feedback loops that connect to customers, employees, and markets are essential for enterprises to navigate volatile conditions.

EXM vendors have positioned their platforms as a prime mechanism for creating and closing feedback loops between customers and the enterprise, but since the early 2000s, adoption has been patchy and often siloed. In part, this has been due to the prevalence of low value and often ad hoc surveys, an over-reliance on expensive support, and inflexible systems. Add into the mix survey fatigue among consumers pressed for time and a C-suite that failed to understand the need for continuous feedback and its evident why demand for EXM plateaued.

Fast forward to the mid-2010s, when EXM vendors have significantly modernized, simplified, and infused their platforms with AI in the form of natural language processing (NLP) and machine learning (ML). Vendors have refocused their platforms on customer experience improvement and management. They recognize the correlation between employee and customer experience. They

also understand the importance of market signals to evaluating the health of a brand and input to product development. As a result of this broader experience remit EXM platforms have emerged.

This has made them more useful and valuable to businesses intent on transforming their capabilities to differentiate and grow by being more in-tune with their customers and minimizing CX friction through their many online and offline journeys. The increased ease of use is reflected in the many 1000+ seat deployments in large multi-national enterprises where both business and technical users have access to insights and metrics to monitor the progress of their CX strategies and programs.

More advanced vendors have reinvented the EFM category as a platform for EXM. This covers the entire chain of experiences: customers, employees, products, and relative brand sentiment. EXM platforms harness feedback from an increasing number and variety of digital channels, from social media to chat and video communications and more.

Key trends in the EFM to EXM market

EFM vendors have shifted from serving individual departments and analysts to a more strategic focus on EXM, with both business and technical users. This coincides with the increased priority on CX and concerns for employee wellbeing brought about by the COVID-19 pandemic. The pandemic laid bare the fragility of many businesses and the need to ramp up their digital transformation efforts in the pursuit of survival first and post-pandemic growth.

While there is still a place for long-form surveys, particularly in B2B markets, pulse surveys are often limited to a single rating question. A space for comments by the consumer or employee has become more common, and advances in NLP enable interpretation of these free-form responses. The results from such surveys also surface in role-based dashboards. Alerts increasingly appear within the main enterprise applications used across the value chain or as mobile alerts for those outside the office.

The omnichannel remit has also expanded during the pandemic, especially with video and SMS communications. The leading EXM vendors have added these capabilities and also provided out-of-the-box surveying processes to monitor customer and employee sentiment and the impact of the pandemic on behavior. EXM vendors also keep track of trends and events that affect CX and constantly update their capabilities so that customers can take advantage of any enhancements or important behavioral changes.

More widespread use of AI and automation, as well as deeper integration with supply and demand-side enterprise applications, will continue apace.

Crowdsourcing for product development is another growing area which some EXM platforms already provide.

Future market developments

While the basics of feedback capture, analysis, and action have been around since the early 2000s, the major developments have been in the field of mobile app development, AI, and big data ingestion and analysis. We can expect AI developments to continue apace with advanced features, including sentiment analysis based on facial expression recognition (subject to privacy laws), particularly where video and augmented reality apps become more commonly used after 5G has been rolled out.

Convergence and increased competition

The more advanced customer engagement platforms partially serve the need for greater empathy and a deeper understanding of the individual customer's context. By the mid to late 2020s, the leading CEPs will provide dynamic orchestration, which is an even greater real-time insight into customer sentiment and context to trigger the most relevant response at any stage and across all customer journeys. This presents a potential threat to EXM vendors unless they can embed their platforms within the leading CEPs. This is already happening with Qualtrics, which was acquired by SAP. Microsoft launched Dynamics 365 Customer Voice in July 2020, its second attempt to embed VoC in its applications (it retired its first attempt). Other major CEP vendors like Oracle and Salesforce already provide some VoC capabilities to enrich customer profiles, and these efforts are going to accelerate, supported by more pervasive intelligence and automation.

However, EXM platform capabilities will continue to play a vital role in providing greater depth of analysis of sentiment trends and customer emotions, and a unified view across multiple touchpoints and customer journeys.

As discussed earlier, another threat comes from customer journey analytics specialists who provide insights around interaction traffic and can identify sources of friction. While they do not determine the sentiment that drives customer journey choices, from a process development perspective, they are an essential aid to customer journey design.

To counter these threats, EXM vendors must bring their know-how to strategic partnerships with CEP vendors and consider acquiring CJA and conversational AI vendors while they are relatively small.

Vendor landscape



Source: Omdia

Assessment criteria

After detailed briefings from each of the participating vendors, seventeen criteria were used to provide a comparative assessment, resulting in the heatmap in Figure 1. Capabilities were graded and color-coded from purple for advanced capabilities or breadth in terms of geographical or industry coverage to pink for where the capability is currently absent.

Given the genesis and relative maturity of the market, there is considerable commonality across the key attributes and capabilities. Each of the EXM vendor platforms scored well on the following criteria:

- A unified platform for VoC and VoE

- A customer journey orientation with the ability to determine the quality of the entire journey, not just individual touchpoints, and make recommendations for improvements
- Linking of feedback results with KPIs associated with the financial outcomes
- Data privacy and regulatory compliance mechanisms

Not surprisingly, the relative newcomers had no industry benchmarking capabilities. Apart from that, every vendor had either advanced, broad, or partial capabilities across the remaining attributes.

Vendor positions

Vendors were positioned as leaders or challengers and a specialist category, vertical specialist leader, to recognize the highly specialized depth of capabilities in support of a narrow spectrum of industries.

Market leaders

Given the relative maturity of the market, five leaders were identified – Confrimit, InMoment, Medallia, Qualtrics, and Verint. Each has extensive services capabilities and best practices expertise to support regions across the world and an extensive portfolio of global enterprises across a diverse range of industries that use these platforms strategically as a foundation for enhancing the customer experience. They all make extensive use of AI and automation to drive remedial action.

Vertical specialist leader

SMG is a vertical specialist leader due to its particular strengths in the restaurant and retail industries, especially among large, global enterprises operating under the franchise model, such as McDonald's, Nando's, and Domino's Pizza, among others. It runs large scale global CX programs for these companies and complex hierarchical organizations such as Shell Oil.

Market challengers

Sandsiv, Wonderflow, and Wootric are the market challengers that threaten the established order through innovation, less services-intensive capabilities, and lower costs. Sandsiv has particular strength in NLP providing both sentiment analysis and topic detection, Wonderflow in product development support, and Wootric in SaaS-based businesses.

Vendors on the Omdia Market Radar: AI-enabled experience management platforms

On the radar: Confrimit Horizons

Omdia view

Confrimit is a market leader bringing to bear both extensive expertise and experience in global VoC/VoE and VoM strategic programs, underpinned by its unified EXM platform – Confrimit Horizons.

The vendor continues its technology-driven approach to the analysis of unstructured data. Reaching across many industries with an impressive client list, Confrimit delivers a modern technology platform and has many long-standing client relationships.

AI-led native text, audio, and video analyses drive insights across the customer journey, and the recent merger with Dapresy brings together advanced visualization capabilities. Conconfirmit will continue to be a market leader.

Key messages

- Conconfirmit is a market leader.
- Conconfirmit delivers business impact by using data to support decisions and trigger action to improve the customer and employee experience.
- The Conconfirmit platform, Horizons, is highly configurable and integrates with a wide range of data sources, including other market research platforms.
- Conconfirmit's flexible services and multidisciplinary experts respond to the client's maturity level and allows self-service or close client partnerships.

Why put Conconfirmit Horizons on your radar?

Effective cross-platform security makes Conconfirmit especially attractive to regulated industries and clients operating under strict data privacy laws. With a client base split 50-50 between B2B and B2C, Conconfirmit supports multiple sectors. Conconfirmit is at its heart a technology company, only offering the services needed by clients. With 24 years of experience, it has a wealth of best practice frameworks and guidance and is focused on delivering a return on investment.

Conconfirmit serves mid-market and large enterprise clients often operating in multiple countries and regions of the world. It believes a shared understanding of the customer journey drives cross-functional insight and action. It presents simple visualizations that business users can use without training in data science.

Highlights

Background

Bjorn Haugland founded Conconfirmit in 1996 as Future Information Research Management (FIRM), a market research technology company. Its goal was to improve unstructured data analysis.

In the 2000s, Conconfirmit added data sources and expanded its global reach. In the early 2010s, it launched Conconfirmit Voices, a VoC platform using its Horizons technology. By the mid-2010s, it had added further text and social analytics and built a hub to map multiple data sources. Its current, fifth text analytics tool uses natural language processing and machine learning.

Conconfirmit acquired:

- Pulse Train in 2007, leading to the launch of Conconfirmit Horizons
- Techneos in 2011, adding mobile-rich components to Horizons
- CustomerSat (VoC platform) in 2012, which gave Conconfirmit greater depth and breadth
- Integrasco in 2014, which brought advanced social insight capturing and unstructured text analysis

In 2020, Verdane, a growth equity investor, bought Conconfirmit and announced the merger with Dapresy to enhance CX and EX reporting.

Current position

At the start of each program, Confirmat asks what ROI clients need and builds technology and skills to deliver it. Confirmat presents CX programs as three sets of activity:

Richer data and insights

Confirmat uses highly configurable survey templates to help clients collect feedback. It provides:

- Multichannel data sources including social media, CRM, e-commerce system, other survey platforms, and operational data and metrics
- Emotional and behavioral analysis
- Audio and video
- Internal and external touchpoints

Confirmat integrates disparate data sets to create a unified view. Pre-built templates and workflows prevent data volumes from overwhelming users, and conditions set on the platform prevent employees and customers from receiving too many surveys. During the onboarding or implementation stage, Confirmat provides accelerators – a series of highly configurable templates and pre-defined, best practice workflows that can be applied to expedite implementation. The configurability of these accelerators means that Confirmat can associate the client's program with any series of business KPIs or metrics.

Smarter analysis and decision making

The key to Confirmat's dashboards and reporting is total configurability, enabling companies to work with their experts to align the dashboards to the needs of the business and ensure organization-wide alignment, buy in, and support for a CX program that will ultimately have a strongly positive impact on the company's chosen business metrics. These visualizations allow the user to compare customer and employee perceptions of each touch point and see potential areas for improvement.

Complementary visualizations include, but are not limited to:

- Emotional analysis across the journey shows how different stages in the customer journey impact their emotions, creating a focus on strengths and weaknesses
- High and low lights of the CX, with indications of those needing improvement and positive experiences
- Monitor any KPI selected by the enterprise to drive improvements in CX and the core business metrics, creating a tight link between CX and business outcomes
- Support a wide variety of CX metrics – NPS, Net Easy, top box – and provide advice on the most relevant metrics based on the client's objectives
- Prioritized recommended actions to enhance customer and employee engagement

Role-specific dashboards present appropriate visualizations and can link to customer videos to give a more visceral sense of context.

Faster action and delivery

Confirmat supports two types of action. The first, strategic to drive continuous improvement, provides prioritized insights to identify systemic weaknesses. The second, more immediate and tactical actions, alerts front-line employees so that they can take remedial action or escalate if a customer exhibits signs of dissatisfaction or potential defection.

Action planning functionality lets any user recommend and manage improvement actions. Users can nudge colleagues to start conversations and actions. The dashboard shows the progress of initiatives, predicted and actual impact, and ROI.

Voice of the employee

Confirmit VoE uses the same technology as the VoC platform. Pulse surveys and employee videos give managers and HR teams data to enhance the employee experience. In addition to monitoring employee engagement and morale, Confirmit provides support to elicit the voice of the customer as seen by the employee – what it calls a VoCE program. This allows for a comparative analysis of what customers are saying and employees are seeing, which can be used to reinforce a customer-centric culture, as well as surface any potential blind spots that lead to unintended CX consequences.

Notable customers

Acupoll, Amadeus, Asurion, BAE Systems, Be The Match, BMG Research, BUPA, Credit Union Australia, Deltech, Engage, Erie Insurance, Join The Dots, Mars, Moore Media, NPD, Philadelphia Insurance Companies, QRS, RS Components, Siemens, Virgin Money, Wyndham Vacation Resorts

The future

The merger with Dapresy will bring added, advanced visualizations to meet the requirements of clients with higher levels of maturity:

- Infographic dashboards
- PowerPoint deck creation
- End-user friendly
- User friendly data exploration
- Open API strategy

The merger will create more configuration options throughout the platform.

Data sheet

Key Facts

Table 1: Data sheet: Confirmit

Product name	Horizons	Product classification	Customer feedback platform
Version number	N/A	Release date	N/A
Industries covered	B2B, financial services, insurance, manufacturing, market research, pharmaceutical, retail,	Geographies covered	Global
Relevant company sizes	Enterprise and mid-market	Licensing options	SaaS
URL	https://www.confirmit.com/	Routes to market	Direct and partner resellers
Company headquarters	Oslo, Norway	Number of employees	500

Source: Omdia

Appendix

Further reading

The Gravitational Laws of Customer Experience, INT001-000190 (June 2020)

The Path to Intelligent Customer Engagement Is Through Conversational AI, INT001-000186 (April 2020)

Look Beyond Account-Based Marketing to Revitalize the B2B Growth Engine, INT001-000181 (March 2020)

2020 Trends to Watch: Customer Engagement Platforms, INT001-000166 (December 2019)

The Service Profit Chain, (Heskett, et. al, 1997)

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