

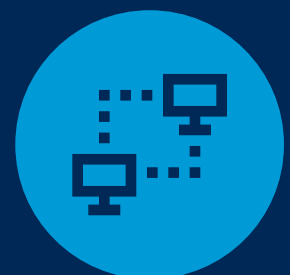
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# Market Guide for User Research Platforms

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## Market Guide for User Research Platforms

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Initiatives: Software Engineering Technologies; Build and Deliver New Digital Products/Experiences to Drive Business Results

The market for user research platforms continues to rapidly evolve in terms of vendors and capabilities for discovering human insights. This research helps software engineering leaders determine what factors to take into consideration when choosing a tool and which vendors to consider.

### Overview

#### Key Findings

- Product teams use user research platforms to collect user insights quickly and at scale. However, many solutions offer similar features, making it difficult for teams to select the right tool for their business needs.
- Traditional research methods are time-consuming and often fail to provide real-time insights, making it difficult for digital product teams to keep pace with rapidly changing user needs and market trends. High-performing digital product teams use research platforms to streamline research processes by conducting research on a continuous basis, facilitated by AI-augmented summaries and sentiment analysis.
- Without the use of intuitive, accessible tools, product teams may face barriers in conducting effective user research, which can lead to design flaws being overlooked. The ease of use of cloud-based platforms can widen access to user research, which allows developers and designers to quickly evaluate design decisions and identify bugs, avoiding costly rework.

## Recommendations

- Advocate for the use of appropriate user research platforms based on the needs of software product teams to enable robust, efficient and scalable user research.
- Empower teams to perform user research early, often and at scale by choosing a vendor that offers swift insights through features such as automatic sentiment analysis, transcript summarization and highlight reel creation.
- Select a vendor that offers a cloud-based platform, and allows access to multiple seats for researchers, designers and developers to collaborate.

## Market Definition

Gartner defines user research platforms as tools that help user experience (UX) professionals and product managers to recruit research participants, conduct evaluations, generate findings, and identify insights to digital product teams and stakeholders across disciplines.

User research platforms streamline the process of gathering, analyzing and interpreting information about the needs, motivations and behaviors of a target audience. These platforms are primarily cloud-based SaaS offerings and can be used by any organization that designs and builds digital products for end-user consumption.

For business leaders, building the *wrong thing* is just as risky as building the *thing wrong*. Software engineering teams are expensive, so dedicating the teams' time and effort to poor product ideas or unwanted features is an enormous avoidable cost. User research platforms won't make products perfect, but they will help teams to massively reduce the risks and costs associated with building software that frustrates users.

User research platforms also make it easier for UX teams to conduct user research early in the development process using prototypes and wireframes, and to repeat it often as the product develops. UX professionals can gather and communicate insights to engineering teams sprint-by-sprint. These platforms can analyze large sets of data so that teams can more easily translate insights into compelling stories to share with stakeholders.

UX professionals and product managers can apply user research platforms to plan, record and analyze:

- Open-ended user interviews. UX teams can speak directly with end users. For example, they can ask a call center operative to describe the things that frustrate them about the call center’s user interface. The qualitative insights from these sessions help to identify areas where teams should improve UX.
- Unmoderated user tests. UX teams can set up a task – for example, “Sign up to this app and set your profile picture” – and then watch recordings of many users attempting the task. This helps UX teams to identify and remedy the users’ friction points.
- Moderated user tests. UX teams can instruct users to complete tasks with software and watch them perform the task in real time. This helps teams evaluate the usability of newly introduced features.
- Accessibility testing. UX teams can observe users of assistive technologies to identify accessibility flaws.

Standard capabilities of user research platforms are:

- Tools to design and conduct moderated and unmoderated user tests
- Video recording and transcription
- Integration with or import features from digital design platforms like Figma and Sketch

Optional capabilities for this market can include:

- Recruitment and segmentation of test participants from a panel
- Automatic sentiment detection, analysis and summarization
- A research repository that can be shared among teams

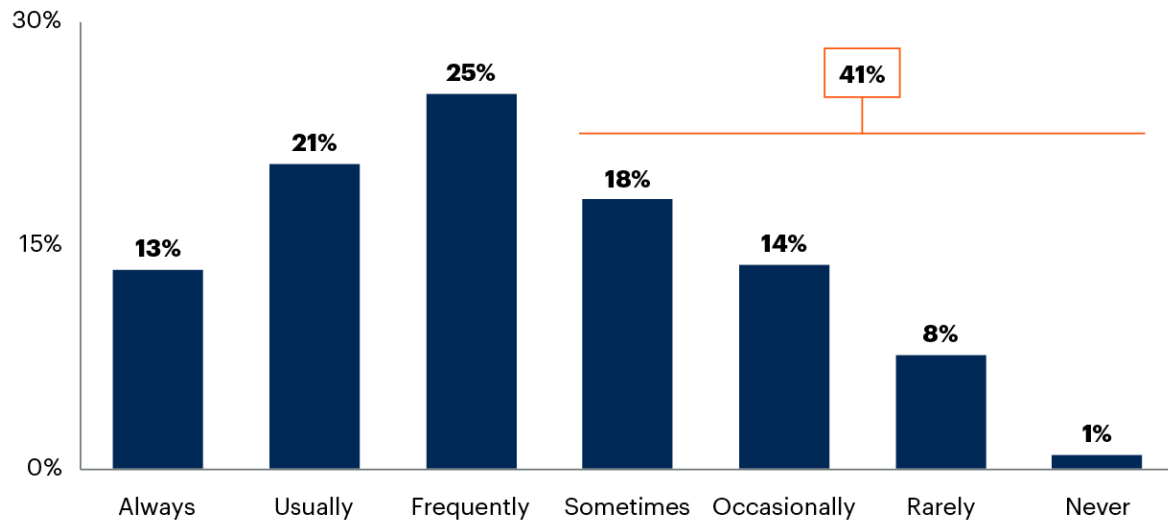
## Market Description

The Gartner Software Engineering Survey for 2024 found that 41% of respondents never, rarely, occasionally or only sometimes incorporate findings from user research into features they build (see Figure 1).<sup>1</sup> This indicates that user research has some way to go before reaching mass adoption.

Figure 1: Frequency of Using Findings From User Research

**Frequency of Using Findings From User Research**

Percentage of respondents



n = 297, engineering leaders with teams focused on application development/software engineering, excluding “not applicable”/“unsure”

Q: When building software, how often are UX design best practices or findings from user research applied to the features you build?

Source: Gartner Software Engineering Survey for 2024

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Good design is user-centered design and relies on thorough research. Such research acts as a guiding force, ensuring both the accuracy of design decisions and alignment with user needs. Without it, there’s a risk of creating products that are either unusable or simply abandoned. Research is a continuous process spanning discovery, descriptive analysis, evaluative and monitoring phases; each playing a pivotal role in the design process. To support product development with thorough research, organizations need deep customer insights from end users.

Vendors have responded by offering user research platforms that gather rich qualitative and quantitative user data. While these platforms can’t replace expertise, they can expand teams’ capabilities (e.g., streamlining the participant recruitment process), aid newcomers and simplify research workflows.

Customers seeking platforms in this market should prioritize providers that facilitate diverse study types in both moderated and unmoderated formats. This enables thorough research – from exploration to ongoing monitoring – with user-friendly browser-based interfaces for all users involved, on both mobile and desktop.

Critical to these platforms is their ability to expedite data usefulness through robust analysis features. While this field is evolving, leading platforms offer visualization tools such as AI-augmented user sentiment, journey analysis and video highlights, transforming raw data into actionable insights. These features succeed in expediting decision making in product and service development.

## Market Direction

There has been a marked increase in interest around user research platforms, with Gartner client interaction data showing a 49% increase in advice volume on user research from 2022 to 2023.<sup>2</sup>

Remote work has accelerated the use of these platforms, as remote access to test participants is simple and scalable. AI-augmented features enhance productivity in these tools. The adoption of digital design platforms like Figma and Sketch has also accelerated user testing of interactive prototypes early in the design process.

Consolidation is happening as large players acquire user research platform companies to gain market share, and we anticipate mergers and acquisitions to continue in the coming year.

Vendors in this market are leveraging AI and emerging generative AI to enhance productivity in these tools. AI-augmented features impacting the market include:

- **Video summarization:** Lengthy video interviews are automatically analyzed for insights.
- **Sentiment analysis:** Users' journeys and transcripts can be tagged with sentiment like "happiness" or "frustration" allowing researchers to skip to that exact moment.
- **Highlight generation:** Some user research platforms will edit a "highlight reel" of the best parts of a user interview, drastically reducing the time to gain insights from hours of recorded video.

Participant management and collaboration features are becoming more prevalent, allowing findings to be shared with the wider team, enabling user research at scale and the ability to reach many participants globally.

## Market Analysis

User research platforms offer multiple approaches when it comes to participant recruitment and management. Some platforms provide built-in participant recruitment capabilities, allowing users to access a pool of prescreened participants for their research studies. These platforms often have features that streamline the participant recruitment process, such as automated scheduling and incentives management.

On the other hand, some platforms allow users to bring their own participants. This means that users are responsible for sourcing and managing their own participants for research studies. This approach gives users more control over participant selection and recruitment methods, but it also requires more effort and resources on the user's end.

User research platforms offer different options for sharing research findings. Various platforms provide built-in research repositories where users can store and organize their research data, insights and reports. These repositories often have collaboration features that allow team members to access and contribute to the research findings. Alternatively, some customers prefer to use their own repository or wiki for storing and sharing research findings.

Increasingly, user research platforms offer emerging capabilities in AI-enabled sentiment analysis. While they will improve over time, these AI algorithms can already analyze qualitative data, such as user feedback or interview transcripts, to identify and quantify sentiment or emotional responses. This automated sentiment analysis can provide valuable insights at scale and help identify patterns or trends in user feedback. In contrast, some platforms offer basic reporting features that allow users to manually analyze and interpret the research data. These features often include data visualization tools, filtering options and basic statistical analysis capabilities. While not as advanced as AI-enabled sentiment analysis, these basic reporting features still provide valuable information for user research analysis.

## Representative Vendors

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

## Vendor Selection

As discussed in the Market Definition section, user research platforms can help plan, record and analyze:

- Open-ended user interviews
- Unmoderated user tests
- Moderated user tests
- Accessibility testing

The following representative vendors were selected for this Market Guide because they support at least one of the above characteristics.

**Table 1: Representative Vendors in User Research Platforms**

(Enlarged table in Appendix)

Vendor Name	Headquarters
Alida	Toronto, Canada
Appcues	Boston, United States
Ballpark	London, United Kingdom
Cauldron (Gorilla)	Cambridge, United Kingdom
Consent Kit	Manchester, United Kingdom
Crazy Egg	La Mirada, United States
Discuss	Seattle, United States
Dovetail	Sydney, Australia
dscout	Chicago, United States
Ethnio	Los Angeles, United States
GetWhy	Copenhagen, Denmark
Hotjar	St Julian's, Malta
Hotjar (PingPong)	London, United Kingdom
Lookback	Palo Alto, United States
Loop11	Melbourne, Australia
Lyssna (formerly UsabilityHub)	Collingwood, Australia
Maze	Menlo Park, United States
Optimal Workshop	Wellington, New Zealand
PlaybookUX	New York, United States
Recollective	Ottawa, Canada
SurveyMonkey	San Mateo, United States
Testbirds	Amsterdam, Netherlands
Trymata (formerly TryMyUI)	Salt Lake City, United States
User Interviews	New York, United States
UserBob	Mustang, United States
Userbrain	Graz, Austria
Userfeel	London, United Kingdom
Userlytics	Miami, United States
Userpeek	Berlin, Germany
UserTesting (UserZoom)	San Francisco, United States
UXArmy	Singapore
WEVO	Boston, United States

Source: Gartner (March 2024)

## Market Recommendations

- Evaluate the platform by scoring it against the specific research methodologies required by the software product teams. These may include surveys, interviews, usability testing or remote ethnographic studies. Ensure that the platform offers the necessary tools and features to conduct your preferred research methods effectively.
- Assess the platform's ability to integrate with other tools in your product design and development group, such as digital design platforms, project management software, analytics platforms or customer relationship management systems. Seamless integration can enhance efficiency and data sharing across different teams and processes.
- Look for a platform that provides rich data analysis and reporting capabilities. Consider whether the platform offers advanced analytics features, such as AI-enabled sentiment analysis, data visualization or statistical analysis, to help derive meaningful insights from your research data.
- Determine whether the platform offers options for sourcing participants, such as built-in panels, third-party integrations or the ability to recruit your own participants. Additionally, assess the platform's screening and targeting capabilities to ensure you can reach your desired user demographics.
- Choose tools that enable easy collaboration among team members, allow the sharing of research findings and insights, and support collaboration with stakeholders or clients as user research activity scales in your organization.

## Evidence

<sup>1</sup> Gartner Software Engineering Survey for 2024. This survey was conducted to:

- Identify the most important roles and skills for software engineering leaders and the change in their demand and importance since last year.
- Understand how talent is sourced both generally and for acquiring necessary AI/machine learning (ML) skills, and what tools are seen to increase developer productivity and the metrics used to measure them.
- Examine how software engineering leaders anticipate change in their operating budgets and the cost management steps taken.

- Identify the quality and testing techniques and programming languages software engineering leaders currently use and/or plan to use; how frequently they use UX design, user research and AI in generating components of user experience; and its impact on user satisfaction, accessibility and usability.
- Understand the responsibilities software engineering leaders find most difficult, the career paths available for senior-level individual contributors and how they are set up, how organizations attract and retain top performers in those career paths, and what management training is offered to staff.

The survey was conducted online from October through December 2023 among 300 respondents from the U.S. (n = 241) and U.K. (n = 59). Qualifying organizations operated in multiple industries (excluding the IT software industry and education sector) and reported enterprisewide revenue for fiscal year 2022 of at least \$250 million or equivalent, with 63% over \$1 billion in revenue. Qualified participants were highly involved in managing software engineering/application development teams and the activities they perform. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> Internal Gartner Inquiry volume data, 2021 to 2023.

## Note 1: Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market and focuses on the market definition, rationale for the market and market dynamics.

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Crazy Egg	La Mirada, United States
Discuss	Seattle, United States
Dovetail	Sydney, Australia
dscout	Chicago, United States
Ethnio	Los Angeles, United States
GetWhy	Copenhagen, Denmark
Hotjar	St Julian's, Malta
Hotjar (PingPong)	London, United Kingdom
Lookback	Palo Alto, United States
Loop11	Melbourne, Australia

<i>Vendor Name</i> ↓	<i>Headquarters</i> ↓
Lyssna (formerly UsabilityHub)	Collingwood, Australia
Maze	Menlo Park, United States
Optimal Workshop	Wellington, New Zealand
PlaybookUX	New York, United States
Recollective	Ottawa, Canada
SurveyMonkey	San Mateo, United States
Testbirds	Amsterdam, Netherlands
Trymata (formerly TryMyUI)	Salt Lake City, United States
User Interviews	New York, United States
UserBob	Mustang, United States
Userbrain	Graz, Austria
Userfeel	London, United Kingdom
Userlytics	Miami, United States
Userpeek	Berlin, Germany
UserTesting (UserZoom)	San Francisco, United States
UXArmy	Singapore
WEVO	Boston, United States

*Vendor Name* ↓

*Headquarters* ↓

Source: Gartner (March 2024)

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