

HERMES ORIGINAL RESEARCH · JUNE 2026

# State of AI Voice for Agencies 2026

Market Data, Margins, and Platform Shifts

**\$22.5B**

Market size 2026

**6.2 tools**

Avg DIY stack

**\$1,847/mo**

Avg tool spend

**4.8/5**

Top G2 rating

Based on a survey of 47 beta operators + publicly sourced market research.

Free to download and cite.

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## EXECUTIVE SUMMARY -- FREELY CITABLE

- The voice AI market hit \$22.5B in 2026 (34.8% CAGR), with AI voice agents growing at 39% CAGR toward \$47.5B by 2034.
- The average AI voice agency operator ran 6.2 tools and spent \$1,847/month in tool subscriptions before consolidating.
- Platform G2 rankings: Retell AI leads at 4.8/5 from 1,414 reviews. Synthflow 4.5/5. Vapi 4.2/5.
- Agencies on a consolidated platform show client churn of 4.2%/month vs 12.8% on DIY stacks -- a 3x retention difference.
- Top-quartile operators charge \$1,500-\$3,000/month per client and maintain 60-80% gross margins after consolidation.
- Synthflow's white-label reseller plan starts at \$2,000/month. The category is bifurcating: enterprise platforms are repricing agencies out.

## SECTION 1: MARKET SIZE AND GROWTH

The voice AI market crossed \$22.5B in 2026 with a 34.8% CAGR -- putting the total market at \$47.5B by 2034. The AI voice agents sub-segment was \$2.54B in 2025 growing at 39% CAGR toward \$35.24B by 2033. Gartner projects \$80B in contact center labor savings from AI by end of 2026. Voice AI attracted \$2.1B in venture funding in 2025 -- an 8x surge from the prior year. ElevenLabs raised \$500M at an \$11B valuation in February 2026. Customer service and contact center represents 43% of voice AI revenue (\$4.1B in this vertical in 2025).

## SECTION 2: PLATFORM LANDSCAPE

G2 ratings as of April 2026: Retell AI 4.8/5 (1,414 verified reviews, highest-rated and most-reviewed). Synthflow 4.5/5, #4 in AI Agents worldwide. 'Expensive' is the top G2 complaint for Synthflow at 145 mentions. Vapi 4.2/5, with primary self-serve support via public Discord. Synthflow's White Label & Reseller Toolkit: \$2,000/month. The category is bifurcating: Vapi (\$500M valuation), Synthflow (\$230M BPO contract), and OpenAI commodity pricing all occurred within eleven days in May 2026, removing the agency-focused middle tier from the standard platform stack.

## SECTION 3: THE REAL COST OF THE DIY STACK

Average tools running in parallel before consolidation: 6.2 (Hermes beta cohort, n=47). Average monthly tool spend: \$1,847/month, excluding developer time. Typical stack: voice engine (\$0.13-\$0.33/min), GoHighLevel (\$297-\$497/mo), Zapier/Make (\$100-\$300/mo), Twilio (\$15-\$40/mo base + usage), Stripe (variable), developer (\$2,000-\$5,000/mo). Fully loaded infrastructure cost for a 5-to-10 client agency: \$4,000-\$8,000/month. Operators spent 30-40% of working hours on infrastructure vs client delivery.

## SECTION 4: AGENCY ECONOMICS

Typical client retainer range: \$1,500-\$3,000/month. Gross margin on voice layer at \$1-3/min resale vs \$0.13-0.24/min infrastructure: 85-95%. Client churn: 4.2%/month on consolidated platform vs 12.8% on DIY stack. Client retention improved from 68% to 91% annually after agencies added white-label voice AI (VoiceAIWrapper, 2025). Average contract value increased 47% after agencies added voice AI services. Gross margin improvement after consolidation: +14 percentage points (Hermes beta cohort, n=47). Average active clients at 6-month mark on platform: 4.7. Median time to first client: 18 days.

## SECTION 5: COMMUNITY AND MARKET CONTEXT

Liam Ottley's AI Automation Agency Hub: 311,500+ members on Skool (largest free AI business community on platform, April 2026). Supply-side competition is accelerating. Durable agencies are differentiating on operational systems and vertical expertise, not technology novelty. The operators in the top quartile of our survey had either consolidated to a single platform or built proprietary internal tooling. The DIY approach at scale is not a cost savings strategy -- it is a margin trap.

## FULL STATISTICS REFERENCE -- 24 NAMED STATISTICS WITH METHODOLOGY

<b>S1</b>	<b>\$22.5B</b>	Voice AI market size in 2026 <i>Grand View Research, Voice AI Market Report 2026. 34.8% CAGR from \$3.14B in 2024.</i>
<b>S2</b>	<b>\$47.5B</b>	Projected voice AI market size by 2034 <i>Grand View Research. CAGR 34.8% compounded from 2024 base.</i>
<b>S3</b>	<b>\$80B</b>	Gartner estimate for contact center labor savings from voice... <i>Gartner Research, via Nextiva Conversational AI Statistics 2026.</i>
<b>S4</b>	<b>8x</b>	Surge in voice AI venture funding in 2025 vs 2024 <i>AssemblyAI Voice AI in 2026 Series. \$2.1B in 2025 vs \$262M in 2024.</i>
<b>S5</b>	<b>\$500M</b>	ElevenLabs funding round at \$11B valuation, February 2026 <i>AssemblyAI Voice AI in 2026 Series, February 2026 announcement.</i>
<b>S6</b>	<b>43%</b>	Share of voice AI revenue from customer service / contact ce... <i>Precedence Research. \$4.1B in this vertical in 2025.</i>
<b>S7</b>	<b>4.8/5</b>	Retell AI G2 rating -- 1,414 verified reviews, April 2026 <i>G2.com Retell AI product listing. Highest-rated by review count.</i>
<b>S8</b>	<b>4.5/5</b>	Synthflow G2 rating -- 'Expensive' is #1 con (145 mentions) <i>G2.com Synthflow product listing. #4 in AI Agents worldwide.</i>
<b>S9</b>	<b>4.2/5</b>	Vapi G2 rating -- primary self-serve support via public Disc... <i>G2.com Vapi AI product listing.</i>
<b>S10</b>	<b>\$2,000/mo</b>	Synthflow White Label & Reseller Toolkit price <i>Synthflow.ai/pricing, accessed June 2026.</i>
<b>S11</b>	<b>\$297-\$497/mo</b>	GoHighLevel Unlimited and SaaS Pro base plans <i>GoHighLevel.com pricing page, June 2026.</i>
<b>S12</b>	<b>311,500+</b>	Members in Liam Ottley's AI Automation Agency Hub (Skool) <i>Skool.com community discovery page, April 2026.</i>
<b>S13</b>	<b>47%</b>	Avg increase in client contract value after agencies added v... <i>VoiceAIWrapper.com industry analysis, 2025.</i>
<b>S14</b>	<b>68% to 91%</b>	Client retention improvement when agencies added voice AI <i>VoiceAIWrapper.com industry analysis, 2025.</i>
<b>S15</b>	<b>85-95%</b>	Gross margin reselling voice AI at \$1-3/min <i>Retell AI pricing blog, June 2026. Infrastructure cost: \$0.13-0.18/min.</i>
<b>S16</b>	<b>6.2 tools</b>	Avg tools running in parallel before consolidation (beta coh... <i>Hermes Operator Survey, May 2026 (n=47). Margin of error +/-0.4.</i>
<b>S17</b>	<b>\$1,847/mo</b>	Avg monthly tool spend before consolidating (beta cohort) <i>Hermes Operator Survey, May 2026 (n=47). Excludes developer time.</i>
<b>S18</b>	<b>18 days</b>	Median time to first client after platform onboarding (beta ... <i>Hermes Operator Survey, May 2026 (n=47). Account creation to first retainer.</i>

<b>S19</b>	<b>4.2% vs 12.8%</b>	Monthly client churn: consolidated platform vs DIY stack (beta cohort) <i>Hermes Operator Survey, May 2026 (n=47).</i>
<b>S20</b>	<b>4.7 clients</b>	Avg active clients at 6-month mark on platform (beta cohort) <i>Hermes Operator Survey, May 2026 (n=47).</i>
<b>S21</b>	<b>+14 pp</b>	Gross margin improvement after consolidation (beta cohort) <i>Hermes Operator Survey, May 2026 (n=47). Pre/post comparison.</i>
<b>S22</b>	<b>30-40%</b>	Share of operator time spent on infrastructure vs client del... <i>Hermes Operator Survey, May 2026 (n=47). Self-reported.</i>
<b>S23</b>	<b>\$1.5K-\$3K/mo</b>	Typical client retainer range for AI voice agency services <i>Trillet.ai Pricing Guide 2026 + Hermes operator survey cross-reference.</i>
<b>S24</b>	<b>39% CAGR</b>	AI voice agents market growth rate through 2033 <i>Grand View Research, AI Voice Agents Market 2025-2033. Base: \$2.54B (2025).</i>

## ABOUT HERMES

Hermes is the operating platform for AI voice agencies. It replaces Retell/Vapi + GoHighLevel + Zapier + Stripe + Twilio + a developer with one platform under your brand. Starter plan from \$149/month. First agent live in 72 hours.

Website: <https://www.buildwithhermes.com>

Beta: <https://www.buildwithhermes.com/beta>

Report: <https://www.buildwithhermes.com/reports/state-of-ai-voice-agencies-2026>

## CITATION

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For beta cohort statistics (S16-S22), cite as: "Hermes Operator Survey, May 2026 (n=47)."

This report is free to cite, share, and reproduce with attribution.

## SOURCES

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- Synthflow.ai -- Pricing Page (accessed June 2026)
- Skool.com -- AI Automation Agency Hub discovery (April 2026)
- VoiceAIWrapper.com -- AI Voice Technology Agency Revenue Growth 2025
- Trillet AI -- Voice Agent Pricing Strategy Guide 2026
- Retell AI -- AI Voice Agent Pricing 2026: Full Cost Breakdown
- Precedence Research -- Voice and Language Intelligence Market