**Gartner Digital Markets**

# Software Market Insights: Customer Relationship Management (CRM)

**Gartner**®

# Overview

Digital business operations and a renewed focus on customer experience drive the demand for responsive and impactful customer relationship management (CRM) solutions across industries globally.

The CRM software market is expected to register double-digit average annual growth of over 14% through 2025, according to the Gartner Enterprise Application Software Worldwide Forecast (full content available to Gartner clients).

Businesses of all sizes rely on CRM systems to compile data across user touchpoints, including website, social media, direct mail, live chat, calls and marketing collateral. Contact management, interaction tracking, lead management and workflow automation are some common features buyers seek in CRM software.

Despite the magnitude of opportunities, positioning a brand in the CRM software market isn't easy. Buyers' demands from CRM systems change constantly, due to the rapid pace of technology innovation and growing importance of understanding customer behavior.

To help software providers understand business challenges and approaches to software investment, Gartner Digital Markets surveyed technology purchase decision-makers across 25 countries, as part of the 2022 Global Software Buyer Trends survey. (Read the survey methodology here.)

This report presents key insights across the five stages of the B2B software buying journey: awareness, consideration, decision, purchase and renewal/growth. It discusses buyers' evolving needs and behaviors across these stages, but note that the B2B buying progression is more fluid and doesn't always follow a linear path. Marketing and sales professionals should identify their prospective customers' position within the buying journey, and then supply the right information at the right time using these insights.

# Key Highlights

- CRM software is used by over 80% of the industry leaders surveyed.

- Businesses in Poland, Colombia, Denmark, Spain, Brazil, Italy and India are the highest investors in CRM software. About one-third of businesses in Portugal, Japan and Ireland have not used CRM software in the last two years, making them ripe for disruption.

- Attracting new customers is one of the major priorities for businesses investing in CRM software solutions.

- When it comes to new CRM investment, businesses follow a cautious approach: Most respondents show an affinity for well-known CRM software providers.

- Ease of use, pricing and functionality are the key drivers influencing the qualification or disqualification of a software provider from consideration.

- IT stakeholders play a strong role in software purchase decisions, making it important for tech providers to target, engage and appeal to IT leaders.

- CRM software buyers refer most frequently to software ratings and reviews sites for more information on CRM solutions and product comparisons.

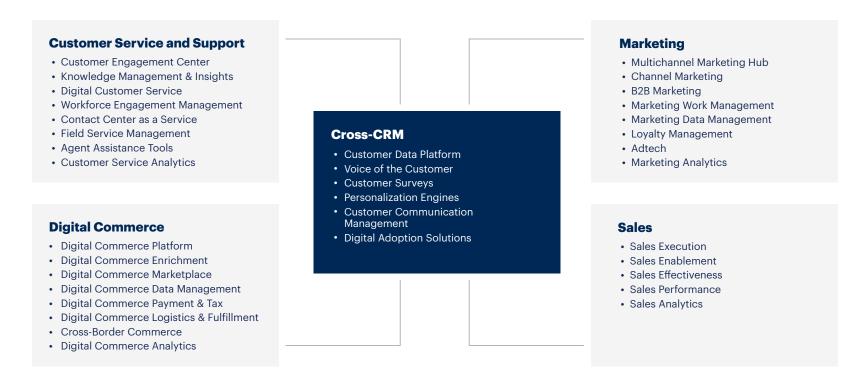# Inside This Report



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CRM Categories
and Trends

# CRM Software at a Glance

Gartner classifies CRM technology into five high-level groups to cover its multifaceted functionalities: customer service and support, digital commerce, marketing, sales and cross-CRM. These are further divided into many subcategories for different views of granularity:

**Customer Service and Support**
- Customer Engagement Center
- Knowledge Management & Insights
- Digital Customer Service
- Workforce Engagement Management
- Contact Center as a Service
- Field Service Management
- Agent Assistance Tools
- Customer Service Analytics

**Marketing**
- Multichannel Marketing Hub
- Channel Marketing
- B2B Marketing
- Marketing Work Management
- Marketing Data Management
- Loyalty Management
- Adtech
- Marketing Analytics

**Cross-CRM**
- Customer Data Platform
- Voice of the Customer
- Customer Surveys
- Personalization Engines
- Customer Communication Management
- Digital Adoption Solutions

**Digital Commerce**
- Digital Commerce Platform
- Digital Commerce Enrichment
- Digital Commerce Marketplace
- Digital Commerce Data Management
- Digital Commerce Payment & Tax
- Digital Commerce Logistics & Fulfillment
- Cross-Border Commerce
- Digital Commerce Analytics

**Sales**
- Sales Execution
- Sales Enablement
- Sales Effectiveness
- Sales Performance
- Sales Analytics
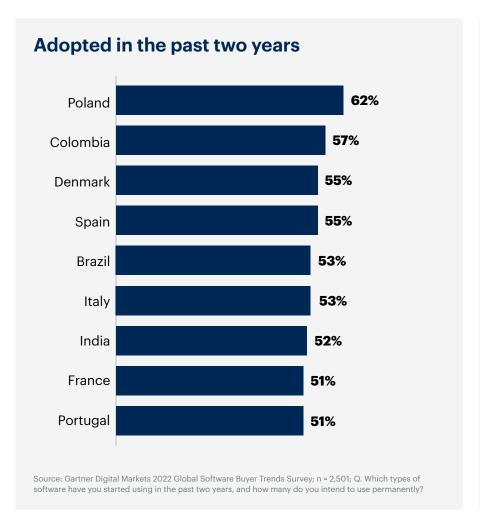
## Trends Shaping CRM Software Adoption

- **Buyers are increasingly investing in cloud-based CRM software solutions** due to their shorter deployment time, easy scalability and lower costs. Between 70% to 80% of CRM investments are made in software-as-a-service (SaaS) tools, according to Gartner.

- **Demand for integrating new technologies in CRM tools is rising.** Software providers who offer the latest features such as artificial intelligence (AI) in CRM systems will be better equipped to meet evolving buyer expectations.

- **Uptake of industry-specific CRM solutions is growing,** as businesses expect to receive tools with features and templates customized for their industry and regulatory landscape.
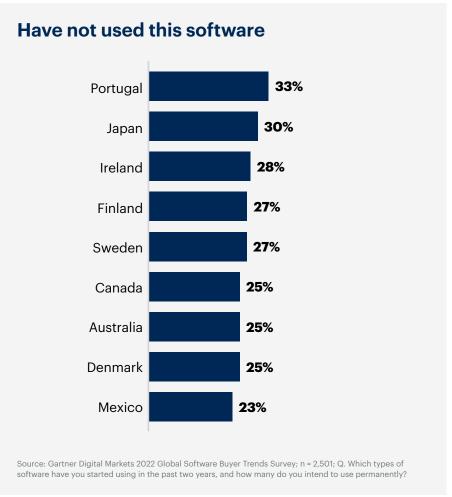
# Get to Know CRM Software Buyers

**Building a viable go-to-market and sales strategy in the CRM software category requires understanding the key priorities and behavior of buyers.**
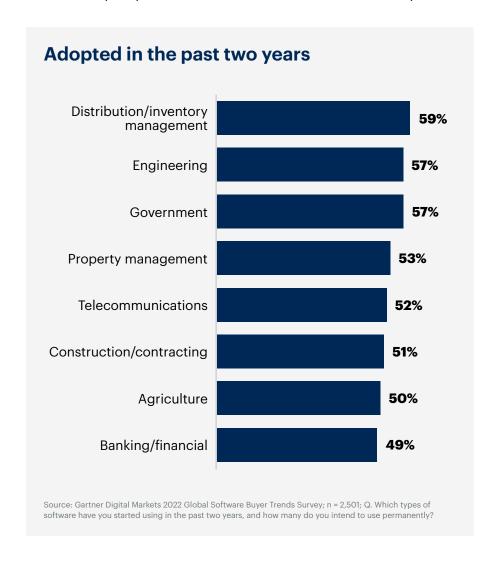
# Global CRM Software Adoption

Businesses in Poland, Colombia, Denmark and Spain are investing significantly in CRM software. About one-third of businesses in Portugal, Japan and Ireland have not used CRM software in the last two years, making them ripe for disruption. Buyers in the U.S., Netherlands, United Kingdom and Germany are consistent users of CRM software and continue to invest in it.

## Adopted in the past two years

| Country | % |
|---|---|
| Poland | 62% |
| Colombia | 57% |
| Denmark | 55% |
| Spain | 55% |
| Brazil | 53% |
| Italy | 53% |
| India | 52% |
| France | 51% |
| Portugal | 51% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which types of software have you started using in the past two years, and how many do you intend to use permanently?

## Have not used this software

| Country | % |
|---|---|
| Portugal | 33% |
| Japan | 30% |
| Ireland | 28% |
| Finland | 27% |
| Sweden | 27% |
| Canada | 25% |
| Australia | 25% |
| Denmark | 25% |
| Mexico | 23% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which types of software have you started using in the past two years, and how many do you intend to use permanently?
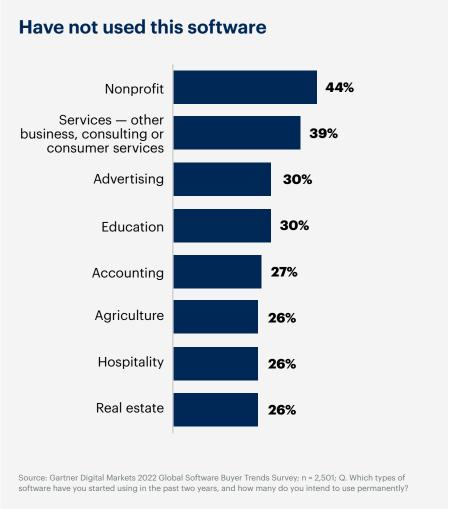
# CRM Significance Across Industries

The highest investment in CRM software is from the distribution/inventory management, engineering, government, property management, telecommunications and construction/contracting industries. In addition, there's a strong opportunity for CRM solution providers in the nonprofit, services (business, consulting or consumer services), advertising, education and accounting industries, as over a quarter of buyers from these industries say they haven't used CRM software in the last two years.
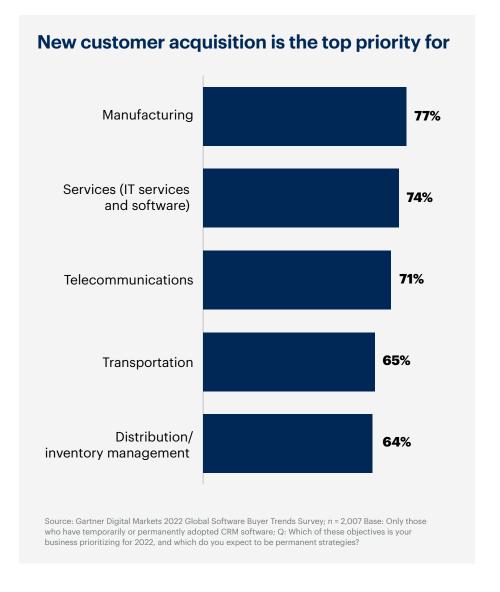
## Adopted in the past two years

| Industry | % |
|---|---|
| Distribution/inventory management | 59% |
| Engineering | 57% |
| Government | 57% |
| Property management | 53% |
| Telecommunications | 52% |
| Construction/contracting | 51% |
| Agriculture | 50% |
| Banking/financial | 49% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which types of software have you started using in the past two years, and how many do you intend to use permanently?

## Have not used this software

| Industry | % |
|---|---|
| Nonprofit | 44% |
| Services — other business, consulting or consumer services | 39% |
| Advertising | 30% |
| Education | 30% |
| Accounting | 27% |
| Agriculture | 26% |
| Hospitality | 26% |
| Real estate | 26% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which types of software have you started using in the past two years, and how many do you intend to use permanently?

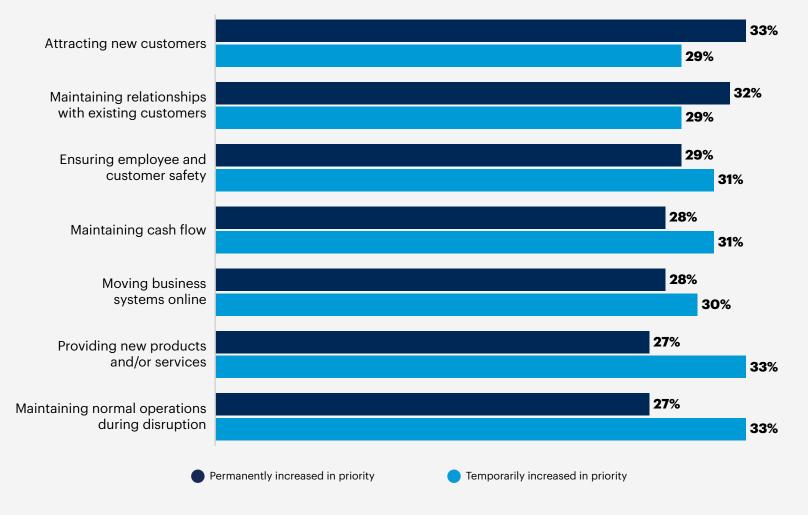# In-Market CRM Buyers Want to Expand Their Customer Base

CRM systems offer effective ways for businesses to cultivate stronger relationships with customers. Attracting new customers and maintaining existing customer relationships are the top priorities for buyers. The safety of customers and employees, cash flow management and digitizing business systems are other challenges CRM buyers aim to address to boost engagement, productivity and revenue.

B2B marketers and sales teams should highlight features that help businesses solve these relationship management challenges. For example, CRM providers targeting the marketing industry can promote the efficiency of their CRM solutions in collecting detailed information on customers' purchase history.

## New customer acquisition is the top priority for

| Industry | Percentage |
|----------|-----------|
| Manufacturing | 77% |
| Services (IT services and software) | 74% |
| Telecommunications | 71% |
| Transportation | 65% |
| Distribution/inventory management | 64% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Only those who have temporarily or permanently adopted CRM software; Q: Which of these objectives is your business prioritizing for 2022, and which do you expect to be permanent strategies?

## Objectives buyers aim to achieve using CRM technology
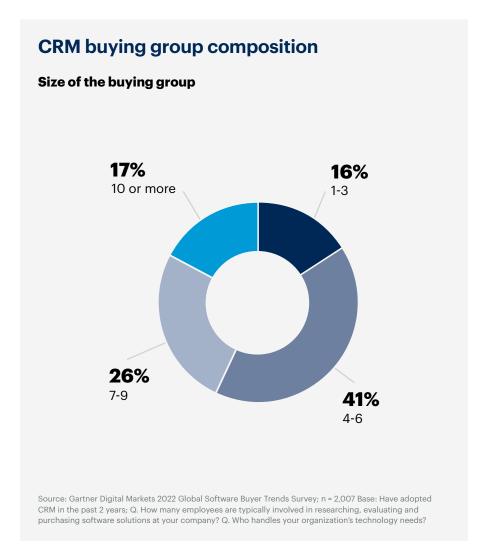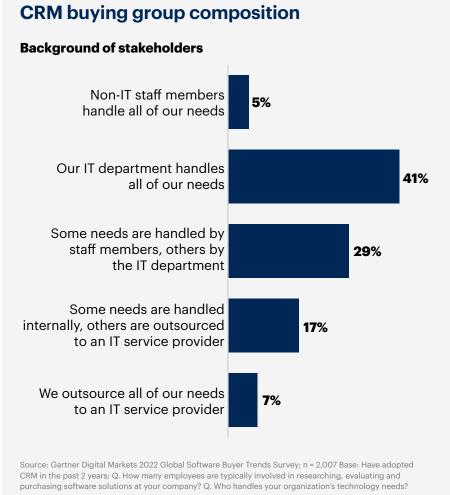
**Attracting new customers**
- 33%
- 29%

**Maintaining relationships with existing customers**
- 32%
- 29%

**Ensuring employee and customer safety**
- 29%
- 31%

**Maintaining cash flow**
- 28%
- 31%

**Moving business systems online**
- 28%
- 30%

**Providing new products and/or services**
- 27%
- 33%

**Maintaining normal operations during disruption**
- 27%
- 33%

● Permanently increased in priority          ● Temporarily increased in priority

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM software in the past 2 years; Q: Which of these objectives is your business prioritizing for 2022, and which do you expect to be permanent strategies?

# Stakeholders Involved in CRM Purchase Decisions

An average of four to six stakeholders are involved in CRM software purchases, but the number can reach 10 or more. Most businesses involve IT staff members in the decision-making group, which makes it important to target, engage and appeal to IT leaders via marketing campaigns. Sales teams should also be ready to pounce: One in six CRM buyers takes less than three months to complete the buying journey.

## CRM buying group composition

**Size of the buying group**

**17%**
10 or more

**16%**
1-3

**26%**
7-9

**41%**
4-6

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM in the past 2 years; Q. How many employees are typically involved in researching, evaluating and purchasing software solutions at your company? Q. Who handles your organization's technology needs?

## CRM buying group composition

**Background of stakeholders**

Non-IT staff members handle all of our needs — **5%**

Our IT department handles all of our needs — **41%**

Some needs are handled by staff members, others by the IT department — **29%**

Some needs are handled internally, others are outsourced to an IT service provider — **17%**

We outsource all of our needs to an IT service provider — **7%**

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM in the past 2 years; Q. How many employees are typically involved in researching, evaluating and purchasing software solutions at your company? Q. Who handles your organization's technology needs?
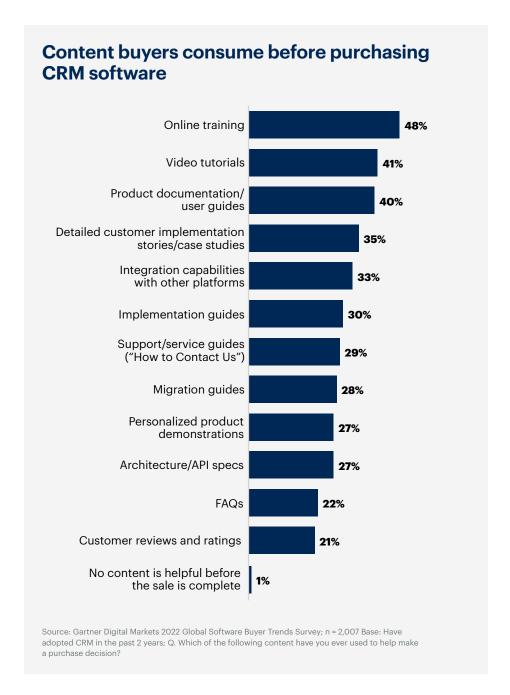
# Online Training, Video Tutorials Are Most Valuable Content for Buyers

Most CRM software buyers refer to online training, video tutorials, and product demos or user guides when researching a viable solution to their business problem. Detailed customer implementation stories and case studies also often catch the attention of CRM buyers.

Software providers should give buyers the right information at the right time in the form of marketing collateral they prefer to help them reach consensus among multiple stakeholders, make an informed buying decision and build their confidence in the purchase.

## Content buyers consume before purchasing CRM software

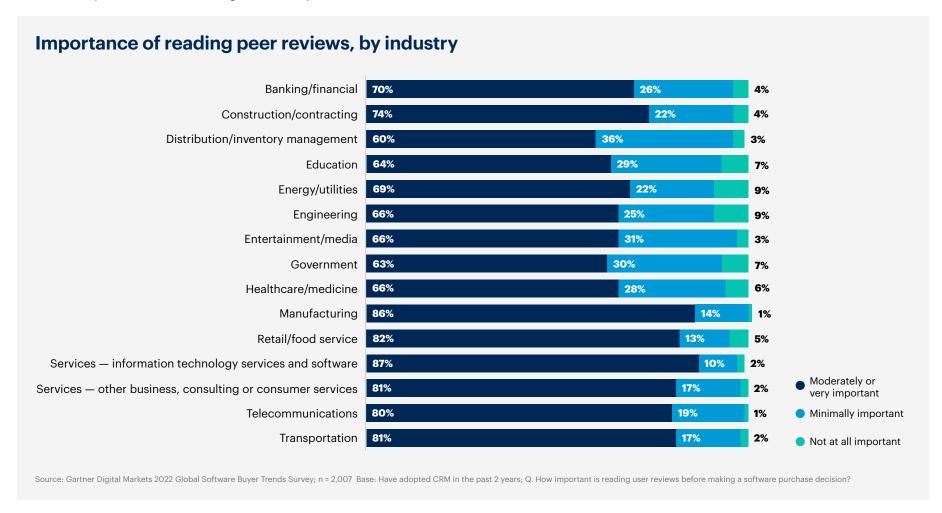| Content | Percentage |
|---|---|
| Online training | 48% |
| Video tutorials | 41% |
| Product documentation/user guides | 40% |
| Detailed customer implementation stories/case studies | 35% |
| Integration capabilities with other platforms | 33% |
| Implementation guides | 30% |
| Support/service guides ("How to Contact Us") | 29% |
| Migration guides | 28% |
| Personalized product demonstrations | 27% |
| Architecture/API specs | 27% |
| FAQs | 22% |
| Customer reviews and ratings | 21% |
| No content is helpful before the sale is complete | 1% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM in the past 2 years; Q. Which of the following content have you ever used to help make a purchase decision?

# Top Considerations for Software Evaluation: UX and Price

## CRM software buyers are value-conscious.
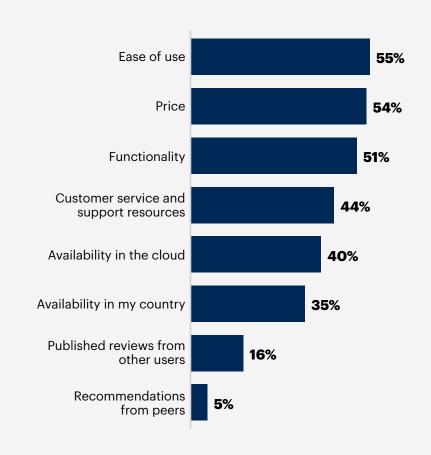
On average, over half of the CRM buyers say functionality, ease of use and pricing are the key factors influencing their decision to shortlist or drop a product from consideration. In addition, customer service and support resources are important for nearly 44% of respondents when selecting a CRM software provider.

CRM solution providers should remain cost-competitive and provide clear and helpful guides on the functionality offered by their software and how to use it.

## 44%

of respondents found customer service and support resources important when selecting a CRM software provider

**Top decision criteria for CRM software buyers**

| Criteria | Percentage |
|---|---|
| Ease of use | 55% |
| Price | 54% |
| Functionality | 51% |
| Customer service and support resources | 44% |
| Availability in the cloud | 40% |
| Availability in my country | 35% |
| Published reviews from other users | 16% |
| Recommendations from peers | 5% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM in the past 2 years; Q. When making a software purchase, which factors are the most influential in your decision?

# User Reviews Widely Impact CRM Purchase Decisions
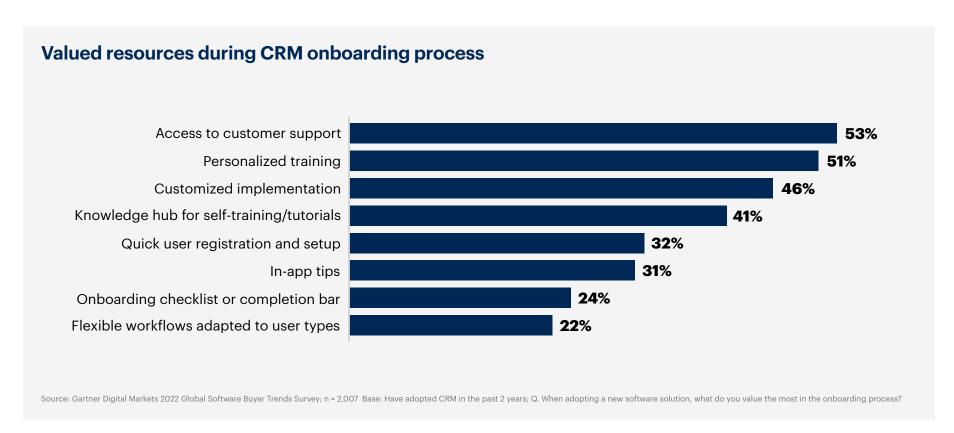
User reviews and customer feedback are important for CRM software buyers across industries. More than two-thirds of respondents say reviews from industry peers are a valuable part of their decision-making process. B2B buyers prefer reading recent and high-quality reviews.

Software and SaaS providers should encourage existing customers to share feedback on CRM implementation, as well as address the concerns raised to build brand reputation online. They should also publish positive reviews on their website, as well as the third-party ratings and reviews sites that buyers visit for evaluating software options.

## Importance of reading peer reviews, by industry

| Industry | Moderately or very important | Minimally important | Not at all important |
|---|---|---|---|
| Banking/financial | 70% | 26% | 4% |
| Construction/contracting | 74% | 22% | 4% |
| Distribution/inventory management | 60% | 36% | 3% |
| Education | 64% | 29% | 7% |
| Energy/utilities | 69% | 22% | 9% |
| Engineering | 66% | 25% | 9% |
| Entertainment/media | 66% | 31% | 3% |
| Government | 63% | 30% | 7% |
| Healthcare/medicine | 66% | 28% | 6% |
| Manufacturing | 86% | 14% | 1% |
| Retail/food service | 82% | 13% | 5% |
| Services — information technology services and software | 87% | 10% | 2% |
| Services — other business, consulting or consumer services | 81% | 17% | 2% |
| Telecommunications | 80% | 19% | 1% |
| Transportation | 81% | 17% | 2% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. How important is reading user reviews before making a software purchase decision?

# Customer Support Drives Success for CRM Onboarding

Without successful onboarding, it's difficult for tech providers to retain customers or expand the contract value. They should offer priority access to customer support, personalized training and customized implementation to foster post-purchase relationships, drive marketing impact and boost product adoption.

## Valued resources during CRM onboarding process

| Resource | Percentage |
|---|---|
| Access to customer support | 53% |
| Personalized training | 51% |
| Customized implementation | 46% |
| Knowledge hub for self-training/tutorials | 41% |
| Quick user registration and setup | 32% |
| In-app tips | 31% |
| Onboarding checklist or completion bar | 24% |
| Flexible workflows adapted to user types | 22% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. When adopting a new software solution, what do you value the most in the onboarding process?

# Integrations and Alternatives Influence Churn for CRM Customers

Nearly half of CRM buyers evaluate alternatives as the renewal cycle approaches, even if they are satisfied with the current technology provider. Improper integration with existing technologies and availability of better alternatives are the top two reasons buyers cite for replacing CRM software. Marketers and business development professionals should focus on making buyers aware of new product features and integrations to keep them engaged and reduce churn.

## Reasons to replace existing software

| Reason | Percentage |
|---|---|
| It didn't work well with our other software systems | 37% |
| It was too buggy or prone to failure | 32% |
| We found a better alternative solution | 31% |
| It failed to provide advertised benefits | 29% |
| We failed to find a good use case for it | 28% |
| It frustrated our users | 28% |
| Our software budget was reduced | 23% |
| It cost too much | 20% |
| Not sure | 2% |

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. When adopting a new software solution, what do you value the most in the onboarding process?

# Key Recommendations to Better Engage CRM Buyers

**As the CRM software market becomes more competitive, capturing buyers' attention and establishing brand presence can be tricky. Follow these tips to establish a stronger customer base in the fast-growing CRM marketplace.**

# 1 Target Key Triggers for CRM Software Investment

For buyers who have purchased CRM software, the need for productivity improvements is the highest motivating factor for investing in CRM technology, followed by competitive pressure and outgrowing current technology.

→ **Recommendation**

On your website and in marketing collateral, clearly outline the productivity improvements and advanced functionality buyers can gain from your CRM solution. Demonstrate the relevance of your product and services by directly linking your marketing messaging with customer success stories and industry use cases. Highlight how industry leaders are investing in CRM software and the benefits it's bringing to them. Show a cost-benefit analysis from CRM implementation.

## 5 major factors driving investments in CRM technology

**53%**
Needed productivity improvements

**43%**
Competitive pressure

**40%**
Outgrew current technology

**36%**
Current technology is obsolete

**34%**
Expanding business locations

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. Please select the top 3 factors that triggered your investment in new software.

# 2 Identify the Primary Decision Makers

CRM software buying groups heavily rely on IT staff to make purchase decisions. About 41% of respondents say their CRM technology needs are handled entirely by the IT department, followed by 29% who rely on a mix of IT and other staff. Only 7% of respondents say their software purchase decisions don't include IT professionals (read more insights here).

## → Recommendation

As CRM buying groups are likely to include IT staff, design your marketing and sales campaigns for this technical audience segment. Take special care to map IT buyer personas, such as CIOs and CTOs, who may have the final say.

Define use cases for your software and provide implementation guides and integration instructions. Include measurable success markers, such as ROI, to help stakeholders make a strong business case to CEOs and business owners, who are likely to sign off on the final decision for CRM investment.

## CRM buying group stakeholders

**5%**
Non-IT staff members handle all our needs

**41%**
Our IT department handles all our needs

**29%**
Some needs are handled by staff members, others by the IT department

**17%**
Some needs are handled internally; others are outsourced to an IT service provider

**7%**
We outsource all our needs to an IT service provider

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM in the past 2 years; Q. Who handles your organization's technology needs?

# 3 Use Preferred Channels for Targeted Buyers

CRM software buyers heavily rely on software ratings and review sites (48%) to compare products and review solution providers. Calls with sales representatives (46%) and vendor websites (42%) are the next preferred channels for buyers to get more information and explore CRM software solutions.

→ **Recommendation**

Ask existing customers to review your products, and make the reviews available on third-party reviews sites that buyers visit to evaluate software options. It'll increase your market footprint and boost chances of reaching high-quality prospects. Ensure critical product features, pricing and other information that buyers seek are available at all important customer touchpoints.

## Top five engagement channels CRM buyers prefer

**48%**
Software ratings or reviews sites

**46%**
Calls or video calls with sales representatives

**42%**
Vendor websites

**36%**
Personalized emails by vendors

**36%**
Live chat with vendor representatives

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. Which channels do you prefer to use to obtain information about a software solution?

# 4 Be Ready With the Right Information

Although reaching a consensus is difficult, CRM buyers make purchase decisions quickly, with one in every six buyers taking less than three months. Most CRM buyers spend the longest time identifying which CRM systems are best able to solve their problem (38%), followed by determining the best-fit software provider (29%).

→ **Recommendation**

Time your sales outreach and marketing collateral with buyers' readiness for the information. Be mindful of where buyers are in the purchase journey and refine your content accordingly. Don't overload buyers with unnecessary information; that can overwhelm them and lead to an abandoned sale.

Consider translating and localizing key content, as CRM software buyers find it important to have support services (82%), software user interfaces (79%), training courses and materials (79%), and video tutorials (79%) in their primary language versus English.

## Amount of time spent in each step of the CRM software buying process

**18%**
Learning how software can help address my challenge

**38%**
Identifying which systems are best able to solve the problem

**28%**
Determining which vendor is most appropriate for my business

**10%**
Completing the purchase through my procurement process

**7%**
Deploying and integrating the software

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007 Base: Have adopted CRM in the past 2 years; Q: In which step of the software buying process do you spend the most time?

# 5 Promote the Features That Buyers Care About

Better user experience (84%), training and support services (84%), and data privacy (83%) are the three main features that buyers want in their CRM software solutions. These are closely followed by the need for proper integrations, scalability and reporting capabilities.

→ **Recommendation**

Highlight product features that buyers care about; mention them on product pages and websites and in marketing and sales collateral. It's increasingly important to show prospects how your CRM software complies with data security and privacy regulations for customer data collection. Plus, inform prospects that they will have access to training modules and customer support so they know that they'll be cared for after the purchase.

## Top 10 features buyers look for in CRM software

**84%** Better user experience

**82%** Reporting capabilities

**84%** Training and support services

**81%** Cybersecurity

**83%** Data privacy

**81%** Distributed cloud

**82%** Seamless integrations

**78%** Automation, AI and machine learning

**82%** Scalability

**74%** Unbundling features for tailored pricing

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. How important are the following features when evaluating software solutions? [Rated "moderately important" or "very important"]
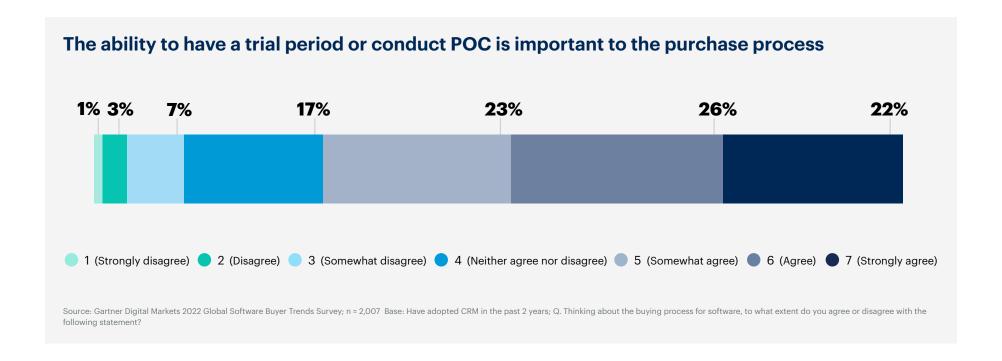
# 6 Offer Free Trials and Proof-of-Concept (POC) to Acquire New Customers

Most CRM buyers say that trial periods and POCs play a major role in facilitating their software purchase decision and building stakeholder confidence.

→ **Recommendation**

Highlight free trial or demo options on your landing pages, ads and other customer touchpoints. Then, set up a free-to-paid conversion strategy to follow up with your free trial users. To identify who among your trial subscribers are the most qualified leads, look for the signs of an active buying cycle. Additionally, reach out with the right content (e.g., customer testimonials, product reviews) for post-trial or post-demo outreach.

## The ability to have a trial period or conduct POC is important to the purchase process

1% 3% 7% 17% 23% 26% 22%

- 1 (Strongly disagree)
- 2 (Disagree)
- 3 (Somewhat disagree)
- 4 (Neither agree nor disagree)
- 5 (Somewhat agree)
- 6 (Agree)
- 7 (Strongly agree)

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. Thinking about the buying process for software, to what extent do you agree or disagree with the following statement?

# 7

## Promote New or Seldom-Used Features to Increase Renewals

Before renewing a technology contract, CRM software buyers compare competencies and functionalities between different alternatives, regardless of whether they're satisfied with their existing technology. About 40% of buyers say they do a cursory evaluation of alternatives before renewing, followed by 36% who say they evaluate alternatives in-depth before renewing a technology contract.

### → Recommendation

Grow customers' lifetime value with a clear post-purchase onboarding strategy. Additionally, create a continuous improvement strategy for your existing products and plan new product lines and services to show customers the value of renewal. Make sure your customers know about the already available software features that they may not be using and other new offerings in the pipeline.

## Actions tech buyers take before contract renewal

**40%**
Do a cursory evaluation of alternatives

**36%**
Evaluate alternatives in depth

**21%**
Consider evaluating alternatives but do not actually investigate

**3%**
Do not consider alternatives at all

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,007  Base: Have adopted CRM in the past 2 years; Q. When renewing a technology contract your organization is satisfied with, which of these actions does your organization generally take?

**Smart Ways
to Expand
Your Reach**

This report summarizes the most important insights from a Gartner Digital Markets survey to help CRM providers maximize engagement and conversion opportunities at every stage of their customers' buying journey.

# Connect, Convert and Thrive With Gartner Digital Markets

## Get Quality Leads

Pay-per-click campaigns with the Gartner Digital Markets network — Capterra, GetApp and Software Advice — capture 3X more conversions than the industry average. Connect with warmer leads in your targeted industries, and reach those buyers as they actively search for software solutions with our Lead Generation services.

## Collect Customer Reviews

Software products with 10 or more reviews on Gartner Digital Markets get 3X the traffic of other products. Build a trusted online reputation by collecting verified user reviews with our no-cost Review Collection Service.

## Convert Prospects With Intent Data

Tap into Gartner Digital Markets' unparalleled traffic volume of 9 million monthly B2B software buyers to drive pipeline and nail your outreach with our intent data service, Buyer Discovery.

## Reach Software Buyers From Around the World

Take advantage of international growth opportunities by leveraging our local websites, translated landing page services and tips on how to generate and convert more leads from global audiences. We currently offer localized sites for buyers visiting Gartner Digital Markets from more than 30 high-traffic countries.

# Survey Methodology

### Gartner Digital Markets 2022 Global Software Buyer Trends Survey

Results presented are based on a Gartner Digital Markets study to understand business challenges and approaches to technology and software investments. The primary research was conducted in October 2021 among a total of 2,501 respondents in the following countries: United States, Canada, Mexico, United Kingdom, India, Japan, Australia, New Zealand, Italy, Portugal, Brazil, Colombia, Belgium, Poland, Netherlands, Sweden, Denmark, Finland, Norway, Ireland, Singapore, South Africa, Spain, Germany and France.

Respondents were screened for having recently purchased technology and having decision-making authority. Respondents were required to be responsible for making decisions on technology purchases for their organizations.

Disclaimer: Results do not represent global findings or the market as a whole, but reflect the sentiment of the respondents and companies surveyed.

**About Gartner Digital Markets**

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