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Introduction
Adjusting to a New Global Context

2021 left software businesses scrambling and pivoting to continue providing services to customers. The year ahead will likely find them adjusting to new realities shaped by the ongoing global pandemic, including tech-driven and virtual operations, hybrid workforces and digital go-to-market strategies. Deeper trends will likely reinforce other mission-critical priorities such as cybersecurity and customer experience.

For software marketers and sales leaders, this means setting strategies for 2022 and beyond, keeping in mind the shifting behaviors and preferences of modern business-to-business (B2B) buyers and understanding how those shifts impact their software purchase decisions.

Their assessment should start with an understanding of what has changed. For instance, buyers’ approach to software purchase has become self-driven, involving multiple touchpoints, many of which are digital. There is a strong preference for video content among buyers. Growing emphasis on data privacy is leading search engines to suppress third-party cookies, which, traditionally, have been the fuel for targeting ads to potential customers. And the list goes on.

Gartner Digital Markets surveyed 2,500 business leaders — who are responsible for making software purchase decisions — in 25 countries to analyze software adoption behaviors and understand what buyers care about at each stage of the funnel, from awareness and consideration to post-purchase and retention. This guide shares the findings of that survey to provide guidance to software and SaaS companies looking to improve sales and marketing efforts at every funnel stage.
Global Snapshot
Overview: The 2022 Software Buying Landscape

Worldwide Software Spending Is Expected to Grow

The willingness of businesses to adopt technology has increased in the past two years. With the onset of 2022, most companies across geographies and industries aim to double down on software adoption.

The Gartner Digital Markets 2022 Global Software Buyer Trends Survey asked business leaders from 25 countries about their software adoption plans. Two-thirds of respondents expressed an interest in growing their software investment, with one in every four businesses planning to increase software spending by 16% to 30% (read the complete survey methodology here).

Businesses will continue to use software to support remote work infrastructure for online meetings, collaboration and data privacy. Among the 13 software categories surveyed, most business users said they plan to temporarily or permanently adopt software related to communication, marketing and project management, closely followed by human resources, IT management, accounting, and business intelligence and analytics. The fastest-growing industry segment is transportation, indicating that companies involved in supply chains plan the highest increase in new software adoption.

As digital-driven business models become entrenched, software and software-as-a-service (SaaS) providers can expect more spending on technology in 2022.

66% of businesses globally plan to spend more on software in 2022 compared to last year.
Industries planning to spend more on software in 2022

Highest Spenders

- Transportation: 76%
- Banking and finance: 73%
- Services: Information technology services and software: 73%
- Real estate: 71%
- Distribution or inventory management: 70%

Lowest Spenders

- Entertainment/media: 25%
- Wholesale: 23%
- Government: 22%
- Hospitality: 21%
- Education: 20%

Software segments most in demand

- Communications: 35%
- Project management: 20%
- IT architecture and security: 33%
- Marketing: 20%
- Accounting and finance: 32%
- Human resources and talent: 31%
- BI and data analytics: 29%

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. What is your forecasted software spending for 2022 compared to 2021?

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?
New Customer Acquisition Returns as Top Business Priority

Last year, between business closures and changes in consumer spending habits, business leaders were left to manage the immediate consequences of the pandemic. That led them to focus more on retaining existing customers than pitching new leads.

As the dust settles, businesses want to acquire new customers as much as they wish to maintain existing customer relationships. Winning new customers leap-frogged to the top business priority in 2022. More than 60% of the surveyed businesses placed it as their top priority this year, compared to 54% in 2021.

In comparison, employee retention fell in priority, with over 50% of businesses considering it not as important or deprioritizing it versus 34% prioritizing it in 2021. Other business concerns that grew in importance temporarily include engaging remote employees, promoting customer and employee safety, and maintaining cash flow.

Software and SaaS providers should design their offerings around the aforementioned priorities to minimize risk and continue to support daily business decisions, from approving budgets to setting strategies.
Understanding the Buyer Journey
How Do Businesses Buy Software?

Buying Software Is Difficult

The buyer journey catalogs the stages it takes a buyer to move from identifying a business challenge to purchasing a solution to overcome that challenge.

While we can break down this funnel into five stages — awareness, consideration, decision, purchase and renewal — buyers don’t necessarily move through the journey in discrete steps. Buyers typically work on several tasks under different stages at once, and this nonlinear buying journey means software purchases today involve lengthier and more complex processes.
Navigating Lengthy Purchase Timelines

B2B software purchases take time. Most businesses take more than three months to complete a software purchase, according to the survey, with 35% quoting three to six months as the sweet spot and 27% appointing six to nine months as the typical time to purchase.

Many factors contribute to this extended purchase process, including the involvement of multiple stakeholders in the buying group and buyers preferring self-guided search processes over sales meetups before making a purchase. More than half of surveyed businesses said it is hard to reach a consensus on key priorities, as decision makers have very different and often conflicting views of the purchase.

Software providers can add value for buyers by making it easier to navigate the purchase process. Marketing and sales can help buyers complete the buying journey tasks with confidence. They can include information and tools — such as trial periods and free demos — that simplify purchase decisions and help stakeholders reach common ground.

50% of buyers find it hard to reach a consensus on key priorities.
### Global Software Purchase Timelines

#### % Spend Less than 6 Months
- Mexico: 73%
- Canada: 69%
- Australia: 68%
- South Africa: 66%
- Brazil: 66%
- U.S.: 66%

#### % Spend More than 6 Months
- Japan: 55%
- Norway: 55%
- Spain: 54%
- France: 53%
- Italy: 52%
- Sweden: 49%

### Software Buying Steps Buyers Spend the Most Time On

<table>
<thead>
<tr>
<th>Step</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifying which systems are best able to solve the problem</td>
<td>38%</td>
</tr>
<tr>
<td>Determining which vendor is most appropriate for my business</td>
<td>28%</td>
</tr>
<tr>
<td>Learning how software can help address my challenge</td>
<td>18%</td>
</tr>
<tr>
<td>Completing the purchase through my procurement process</td>
<td>10%</td>
</tr>
<tr>
<td>Deploying and integrating the software</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q: How much time does your business usually spend to evaluate, select and finalize a purchase for new software?

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q: In which step of the software buying process do you spend the most time?
Buying Groups Have Gotten Bigger

B2B software investments are usually organizational decisions, rather than being dependent on one individual. They involve multiple influencers and decision-makers who work together to execute a series of buying tasks to complete a purchase.

A huge challenge for software providers and buyers alike is the expanding size of these buying groups. For 62% of the businesses surveyed, four to nine people are involved in purchasing software at their organization.

While businesses still heavily rely on IT to handle tech needs, many non-technical decision-makers have joined the buying mix: 36% of businesses said non-IT staff are engaged in handling either some or all of their tech needs.

These stakeholders usually have very different sets of expectations from a software purchase, and each is armed with personal research and opinions. About 15% of a buying cycle goes into reconciling disparate information and building consensus, according to Gartner research (full report available for clients).

It has never been more important for software and SaaS providers to emerge as enablers and provide information to specific buyer personas to make the purchase process easier for them.

The buying group composition

4 – 9 people
Common buying group size

Who handles your technology needs?

- 40% IT dept.
- 28% Some by staff and others by IT members
- 17% Some internally and others outsourced to IT services
- 8% Non-IT staff
- 7% Outsourced

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; 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?
What Are Buyers’ Top Concerns?

Productivity Needs Come First

Buyers in the awareness stage may not be completely aware of the breadth and depth of the solutions available to them. Software providers must treat those who are just beginning their buying journey very differently from those who know what they want and are ready to buy.

Need for productivity improvements is the foremost trigger driving the need to buy new software, and that remains consistent across geographies. Businesses expect software investment to enable greater productivity for people and processes. Per the investments made last year, the most productive software categories are communications, project management and IT architecture.

Productivity is closely followed by having outgrown current technology and competitive pressures as the next best motivations for planning a new technology investment.

### Top factors motivating investment in new software

<table>
<thead>
<tr>
<th>Need productivity improvements</th>
<th>Brazil: 24%</th>
<th>Colombia: 24%</th>
<th>India: 23%</th>
<th>South Africa: 23%</th>
<th>Mexico: 22%</th>
<th>Portugal: 22%</th>
<th>U.S.: 21%</th>
<th>Canada: 21%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outgrew current technology</td>
<td>Australia: 20%</td>
<td>New Zealand: 17%</td>
<td>Netherlands: 17%</td>
<td>Singapore: 16%</td>
<td>Mexico: 15%</td>
<td>Finland: 15%</td>
<td>Ireland: 15%</td>
<td>Canada: 15%</td>
</tr>
<tr>
<td>Competitive pressures</td>
<td>Poland: 17%</td>
<td>Spain: 17%</td>
<td>Italy: 16%</td>
<td>New Zealand: 16%</td>
<td>Netherlands: 15%</td>
<td>Portugal: 15%</td>
<td>Germany: 15%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Please select the top 3 factors that triggered your investment in new software.
Most Common Challenges: Security, Compatibility and Training

Besides motivating new software purchases, digitalization of businesses has also led to challenges around organizational security. Data and IT infrastructure security remains one of the top concerns as businesses increasingly adopt cloud-based applications, shop from multiple software providers and face challenges posed by remote work.

By 2023, 75% of businesses will restructure their security governance to address new cyber systems and IoT needs, according to Gartner.

Security is closely followed by concerns related to compatibility with existing systems and staff’s acceptance of training for new software. Justifying the investment presents another huge challenge for buyers, as they must bring multiple stakeholders on board with the decision.

For software and SaaS providers, clearly demonstrating the benefits and return on investment (ROI) of their solution and enhancing their brand image can go a long way in gaining buyer preference.
How Do Buyers Explore Software Solutions?

**Buyers Take More Control of the Purchase Process**

The consideration stage is where buyers become familiar with relevant software, evaluate existing solutions and select which will best solve the problem that triggered their buying decision.

When evaluating different software solutions, most buyers strongly prefer a self-driven information search. As buyers wade through their personal research, they seek internal IT experts to deconflict ideas, and research and compare products and providers online. Here are a few important take-aways on buyer preferences and intentions at this stage.

### Information sources buyers trust most when evaluating software

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal research</td>
<td>67%</td>
</tr>
<tr>
<td>Internal IT experts</td>
<td>57%</td>
</tr>
<tr>
<td>Online software directories</td>
<td>41%</td>
</tr>
<tr>
<td>Information directly from the software vendor</td>
<td>37%</td>
</tr>
<tr>
<td>Third-party research</td>
<td>23%</td>
</tr>
<tr>
<td>Webinars and conferences</td>
<td>16%</td>
</tr>
<tr>
<td>User reviews on third-party research websites</td>
<td>14%</td>
</tr>
<tr>
<td>Word-of-mouth and personal recommendations</td>
<td>14%</td>
</tr>
<tr>
<td>External consultants</td>
<td>12%</td>
</tr>
<tr>
<td>Product demonstrations</td>
<td>12%</td>
</tr>
<tr>
<td>Mentions and reviews on social media</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. What are the most influential sources of information when you are evaluating software vendors?
Buyers Rely on Software Reviews Sites

Buyers conduct deep personal research to find a software solution, preferring software ratings and reviews sites over other information channels.

Buyers in the Netherlands, South Africa, Brazil, Belgium and Colombia assign strong value to examining user ratings and reviews. Over 50% of respondents from these countries ranked software ratings and reviews sites as important to their buying decision.

Ratings sites are followed by vendor websites and calls with sales representatives. More interestingly, buyers prefer outreach by sales reps over personalized emails to learn more about software during the consideration stage.

As buyers spend more time scouring different digital channels, the type of information they encounter greatly impacts their purchase decision. If software and SaaS providers’ digital channels fall short of potential impact, they may lose many prospects.

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Buyers’ preferred channels to obtain information on software

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software ratings/reviews sites</td>
<td>17%</td>
</tr>
<tr>
<td>Vendor websites</td>
<td>15%</td>
</tr>
<tr>
<td>Calls or video calls with sales representatives</td>
<td>15%</td>
</tr>
<tr>
<td>Personalized emails by vendors</td>
<td>12%</td>
</tr>
<tr>
<td>Live chat with vendor representatives</td>
<td>12%</td>
</tr>
<tr>
<td>Social media</td>
<td>11%</td>
</tr>
<tr>
<td>Events or webinars</td>
<td>8%</td>
</tr>
<tr>
<td>Live chat on third-party research websites</td>
<td>8%</td>
</tr>
<tr>
<td>eBooks or white papers</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which channels do you prefer to use to obtain information about a software solution?
Types of content buyers use to make software purchase decisions

- Online training: 46%
- Video tutorials: 42%
- Product documentation/user guides: 40%
- Detailed customer implementation stories/case studies: 33%
- Integration capabilities with other platforms: 31%
- Implementation guides: 29%
- Support/service guides ("How to contact us"): 28%
- Personalized product demonstrations: 27%
- Migration guides: 26%
- FAQs: 24%
- Architecture/API specs: 24%
- Customer reviews and ratings: 23%

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which of the following content have you ever used to help make a purchase decision?

Note: Percentages exceed 100% due to respondents being asked to select multiple options.
Buyers Seek Localized Content

As buyers search the web for a best-fit software solution, most would like to receive learning materials and marketing collateral, including training courses and user reviews, in their primary language. Localizing content can increase software providers’ findability in their regions of operation and lead to a better user experience.

The question is: Which content types or marketing communications should software companies localize and translate, and for which regions?

Nearly a quarter of respondents said receiving in-language white papers and vendor communications is “not at all” or “minimally” important for them. Conversely, getting customer support services in their primary language is “very important” for most. Watching video tutorials in the local language is among the top three buyer preferences in several countries, including Colombia, Denmark, France and the U.K.

Software and SaaS providers should translate landing pages and product videos for high-value target markets to maximize conversion and achieve marketing and sales goals across regions.

### Importance of localization for content or vendor interactions

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Very important</th>
<th>Moderately important</th>
<th>Minimally important</th>
<th>Not at all important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support services</td>
<td>49%</td>
<td>32%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Independent user reviews</td>
<td>33%</td>
<td>39%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Software user interfaces</td>
<td>43%</td>
<td>36%</td>
<td>16%</td>
<td>6%</td>
</tr>
<tr>
<td>Third-party software research</td>
<td>32%</td>
<td>40%</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>Training courses and materials</td>
<td>42%</td>
<td>35%</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>Vendor communications (emails, updates, etc.)</td>
<td>37%</td>
<td>34%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Video tutorials</td>
<td>38%</td>
<td>39%</td>
<td>16%</td>
<td>6%</td>
</tr>
<tr>
<td>White papers</td>
<td>29%</td>
<td>37%</td>
<td>25%</td>
<td>9%</td>
</tr>
<tr>
<td>Vendor websites and landing pages</td>
<td>36%</td>
<td>39%</td>
<td>19%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. How important is it to have the following types of content or interactions with a software provider in your primary language versus English?
### Content types ranked moderately to very important for localization, by country

<table>
<thead>
<tr>
<th>Country</th>
<th>Support Services</th>
<th>Software User Interfaces</th>
<th>Training Courses and Materials</th>
<th>Video Tutorials</th>
<th>Vendor Websites and Landing Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>60%</td>
<td>48%</td>
<td>46%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>52%</td>
<td>52%</td>
<td>42%</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td>64%</td>
<td>68%</td>
<td>58%</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Colombia</td>
<td>59%</td>
<td>50%</td>
<td>52%</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>66%</td>
<td>57%</td>
<td>62%</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>63%</td>
<td>60%</td>
<td>53%</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>47%</td>
<td>50%</td>
<td>42%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td>55%</td>
<td>49%</td>
<td>37%</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>65%</td>
<td>57%</td>
<td>47%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>47%</td>
<td>31%</td>
<td>32%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>49%</td>
<td>41%</td>
<td>49%</td>
<td>36%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501. Q. How important is it to have the following types of content or interactions with a software provider in your primary language versus English?
Buyers Show Affinity for Well-Known Brands

Buyers default to known suppliers and level of trust when making software purchase decisions. When asked which type of providers they prefer to do business with, 77% selected well-established providers or providers they have previously worked with, while 23% expressed willingness to purchase from any vendor. Among the industries surveyed, buyers in the services industry are more open to all providers, established or new.

Buyers’ high interest in interacting with familiar brands represents underlying cross-selling and upselling opportunities for software providers. Marketers and client success teams can benefit from providing additional services to existing customers, sending suggestions to buy complementary offerings and keeping customers informed about new features and rollouts.

Software and SaaS providers can also increase investment in brand recognition to capture new buyers who are open to trying out a new but effective provider. Since most interested SaaS buyers opt for a free trial or product demonstration, providers must ensure free-period offerings are within buyers’ reach and use that opportunity to build trust. Almost 70% of respondents agree that taking a trial period or seeing a proof-of-concept (POC) is an important part of their purchase decision.

**Buyers’ preference when evaluating software providers**

- **23%** We are open to any vendor with a solution that could meet our needs
- **39%** We prefer vendors we’ve already worked with
- **38%** We prefer well-established software brands

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Which statement do you agree the most with when evaluating vendors for new software?
How Do Buyers Choose the Best-Fit Solution?

Buyer Priorities: Price, Ease of Use and User Reviews

At the selection and elimination stages, buyers look at certain factors to further shortlist or drop software products from consideration. The key questions they ask at these stages are: What exactly do we require from the solution? Does the software cater to those needs? The takeaway is that buyers at the decision stage primarily look at pricing and user reviews, which also play an important role throughout the buying journey.

On average, 56% of surveyed businesses said price, ease of use and functionality are the top factors to select or drop a provider from the purchase decision. Among the 26 industries surveyed, marketing and public relations emerged as more price-sensitive compared to others.

Additionally, 95% of respondents this year — compared to 78% in 2021 — said they spend time reading online reviews to whittle down potential providers and pick a solution that can solve their needs. User reviews are valued highly across geographies and software segments.

When referencing user reviews, most buyers value the presence of recent reviews and qualitative commentary. Software and SaaS providers should aim to understand how to keep existing customers satisfied and collect meaningful feedback.

Importance of user reviews for software purchase decisions

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. How important is reading user reviews before making a software purchase decision?
Percentage of buyers that consider reviews “very important” to purchase decisions

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>70%</td>
</tr>
<tr>
<td>South Africa</td>
<td>68%</td>
</tr>
<tr>
<td>Brazil</td>
<td>60%</td>
</tr>
<tr>
<td>U.S.</td>
<td>60%</td>
</tr>
<tr>
<td>Singapore</td>
<td>57%</td>
</tr>
<tr>
<td>Australia</td>
<td>48%</td>
</tr>
<tr>
<td>Mexico</td>
<td>48%</td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. How important is reading user reviews before making a software purchase decision?
Privacy, UX and Training Have Most Influence on Software Evaluation

How a software tool collects and secures user information, how easy it is to set up and use, and training resources are the three main objectives buyers have top of mind at this stage.

In Gartner Digital Markets’ 2022 Global Software Buyer Trends survey, 84% of respondents said data privacy, provisioning of online training services and user experience are the features they value most during software evaluation.

Data privacy has become particularly important given the changing regulations by country and locality. B2B buyers need to follow the regulations applicable to their regions of operation, such as the General Data Protection Regulation (GDPR) in Europe and the California Consumer Privacy Act (CCPA) in the U.S.

Stringent regulations have made it vital for B2B buyers to choose software providers who are just as sensitive to privacy regulations. In addition, data sensitivity varies by country: While 73% in the U.S. rated privacy as very important, only 23% in Japan said they consider it important.

### Features buyers rated “very important” during software evaluation

- User experience: 84%
- Data privacy: 84%
- Training and support services: 84%
- Cybersecurity: 82%
- Reporting capabilities: 81%
- Seamless integrations: 81%
- Scalability: 80%
- Distributed cloud: 79%
- Automation, AI and machine learning: 75%
- Freemium pricing package: 72%
- Unbundling features for tailored pricing: 72%

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. How important are the following features when evaluating software solutions?
Top 6 countries where data privacy is rated “very important”

- South Africa: 82%
- India: 77%
- U.S.: 73%
- Australia: 70%
- Brazil: 69%
- Canada: 68%

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. How important are the following features when evaluating software solutions? (Rate each on a scale of “not at all important” to “very important”.)
What Influences the Final Purchase?

**Relevant Content Inspires Purchases**

Whether a purchase will close or be thwarted depends on various factors at the preceding stages, such as pricing, ease of use, user reviews and product features. At this stage, the focus for buyers is ensuring the selected solution is the best fit for their company needs while aligning the decision-making group.

For software providers, marketing and sales should avoid providing confusing information or information contradicting what they have provided in the previous stages.

Software providers should maintain helpfulness in messaging and provide authentic and consistent information relevant to buyers. They should help buyers differentiate their offerings from the rest and clearly highlight their unique value propositions. Emphasizing after-purchase onboarding offerings can also motivate buyers to make the final decision toward buying.

**Communication Is Critical During Onboarding**

Onboarding goes beyond initial deployment and integration. Buyers expect consistent and positive provider interactions, which also play a huge role during renewal decisions.

From product information brochures and in-app tips to user stories and customer service support, buyers prefer software providers that keep them engaged post initial adoption. Moreover, they prefer to receive these communications in their primary language.

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**Onboarding factors valued most by buyers**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to customer support</td>
<td>18%</td>
</tr>
<tr>
<td>Personalized training</td>
<td>16%</td>
</tr>
<tr>
<td>Customized implementation</td>
<td>15%</td>
</tr>
<tr>
<td>Knowledge hub for self-training/tutorials</td>
<td>14%</td>
</tr>
<tr>
<td>Quick user registration and setup</td>
<td>12%</td>
</tr>
<tr>
<td>In-app tips</td>
<td>10%</td>
</tr>
<tr>
<td>Flexible workflows adapted to user types</td>
<td>8%</td>
</tr>
<tr>
<td>Onboarding checklist or completion bar</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. When adopting a new software solution, what do you value the most in the onboarding process?
Access to customer service, personalized training and customized implementation are the highest valued after-purchase factors for most buyers. Other factors include provisioning of a knowledge hub for self-training or tutorials, easy user registration and setup, and placing in-app tips. In-app tips are especially valued for project management, customer relationship management, retail, logistics, business intelligence and data analytics, and property management software categories.

**Low Buyer Satisfaction Impacts Renewals**

High levels of regret post purchase can significantly reduce customer loyalty and sharply dim a company’s chances of a customer advocating for their brand or renewing the software subscription.

While 70% of surveyed businesses believe they purchased high-end and premium software, 44% agreed the software failed to meet expectations. High levels of dissatisfaction among buyers signify unmet expectations — likely related to software performance, customer support or the overall buying experience.

Providing a range of after-sales services is one way software businesses can increase customer satisfaction. They should also conduct surveys and request reviews to capture feedback on buyers’ experiences. These steps will keep their brand top of mind for customers entering the renewal stage. Most survey respondents said they consider either replacing or renewing their existing software subscriptions within two years (40%) or one year (26%).

**Subscription durations software buyers prefer**

- **57%** 3 or 3+ year commitment with a cancellation clause
- **27%** 1 year commitment
- **19%** 2 year commitment without a cancellation clause
- **22%** 2 year commitment with a cancellation clause
- **12%** 3 or 3+ year commitment without a cancellation clause
- **5%** Not sure
- **9%** Monthly commitment

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey, n = 2,501, Q. Which of the following software subscription terms (for a new or renewal purchase) has your business agreed to in the past 2 years?
When Do Customers Decide on Renewals?

Be Prepared for Competition at Every Renewal

The buyer journey is not complete after a purchase. At this stage, customers ask: Do we want to renew our existing software subscription or purchase a new one?

Our findings indicate that decision makers like to buy from brands they are familiar with, but they also consistently evaluate alternatives at renewal time.

Software providers can retain their existing customers by retargeting them with extension options, supplementary products and other factors customers value. This is also a market for new software providers to attract buyers nearing the end of their existing contract and position their products as superior alternatives. Three out of four businesses said they evaluate alternatives before renewing a technology contract, while only 4% said they do not consider any alternatives at all.

Among many reasons to opt for renewal, most businesses said they replaced their software because it didn’t work as well with their other software systems as they had expected. For others, the software turned out to be too complex and hard to use, which led to frustration.

To help buyers ease into software use, software companies should offer extensive integration guides, user guides and online training. They should also put in place a feedback mechanism to collect reviews and rapidly assess customer satisfaction.

Actions buyers take before renewing a technology contract

- 4% Do not consider alternatives at all
- 40% Do a cursory evaluation of alternatives before renewing
- 21% Consider evaluating alternatives but does not actually investigate
- 35% Evaluate alternatives in-depth before renewing

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. When renewing a technology contract your organization is satisfied with, which of these actions does your organization generally take?
Reasons to replace existing software

- It didn’t work well with our other software systems: 15%
- We found a better alternative solution: 15%
- It was too buggy or prone to failure: 14%
- It failed to provide advertised benefits: 12%
- We failed to find a good use case for it: 12%
- It frustrated our users: 12%
- Our software budget was reduced: 10%
- It cost too much: 9%
- Not sure: 2%

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,501; Q. Why was the decision made to replace this software purchase with something else?
Key Take-Aways
10 Things to Expect From Technology Buyers in 2022

Digital transformation is the pillar that has helped companies maintain operations during the disruptions of the last two years, and these changes are here to stay.

1. The willingness of businesses to adopt technology has increased in the past two years. In 2022, software and SaaS providers can expect an increase in technology spending as digital-driven business models become entrenched.

2. As businesses become adept at navigating disruptions, their goal is to attract new customers as well as maintain existing relationships. This is in contrast with 2021 when businesses prioritized retention over new customer acquisition. Software providers should pivot their marketing strategies to support acquisition as well as retention strategies.

3. B2B software buying teams are becoming large and diverse. Software providers should make it easier for buyers to build consensus among multiple stakeholders by including relevant information and helpful tools in their messaging.

4. Software providers should treat those who are starting their buying journey differently from those who know what they want and are ready to buy. They should adjust their engagement tactics and messaging by understanding buyers’ needs and challenges at each stage.

5. Buyers prefer a self-driven software discovery process, given the easy access to quality information online. Software sellers must shape their content and communication around the information sources their target buyers find valuable.

6. Buyers refer to pricing and user reviews throughout the buying journey to make purchase decisions. Software providers should strongly leverage user reviews and feature them (preferably in the local language) based on the country they target.

7. Buyers default to known suppliers or well-established brands when it becomes difficult to differentiate between software providers. Software sellers must focus their efforts on building trust with new buyers by investing in brand building and expanding existing accounts.

8. Buyers expect consistent and positive interactions with their current software provider, which also plays a huge role during renewals. Software businesses should collect user feedback and follow up to ensure their customers’ business outcomes are being met.

9. Competition is stiff during the renewal phase, as most buyers consider other alternatives. Software providers can increase customer satisfaction by providing a range of after-sales services, such as consistent and helpful customer support. This will keep their brand top of mind as customers enter the renewal stage.

10. Software purchase decisions are largely similar across industries. Software marketers and sales teams should build an industry-agnostic approach to address fundamental buyer concerns and help them move further in the buying journey.

Here are the key insights from Gartner Digital Markets’ 2022 Global Software Buyer Trends survey. These insights will help software and SaaS providers determine how to best position their brand and reach buyers in the new global context.
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 decision-making authority. Respondents were required to be responsible for making decisions on purchasing technologies for their organization.

Gartner’s 2021 SMB Software Buying Behaviors Survey

This study was conducted to identify the software buying behaviors of small and medium sized business owners in the past twelve months. The research was conducted online from August 2021 to October 2021 among 500 respondents from the U.S., Canada, Spain, France and Germany and from SMBs with revenue less than $250 million and 2-499 employee size.

Respondents were screened for their involvement in software purchasing decisions and those who were Leader/Member of group or had significant influence qualified for the study. The survey was developed collaboratively by a team of Gartner analysts and was reviewed, tested and administered by Gartner’s Research Data and Analytics (RDA) team.

Disclaimer: Survey 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
Gartner Digital Markets is the world’s most important resource for software providers to connect with in-market buyers, through research, reviews, buyer intent and lead generation. Digital Markets comprises the three leading B2B software search websites — Capterra, GetApp and Software Advice, serving more than 9 million monthly visitors from around the globe. Gartner Digital Markets is proud to partner as a quality, high-volume lead source for more than 40,000 software products.