

Software Market Insights: Project Management

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Gartner Digital Markets

Capterra GetApp Software Advice

Foreword from Claire Alexander, GVP of Brand Portfolio and Marketing at Gartner Digital Markets

At Gartner Digital Markets, we're on a mission to help businesses embrace the software and services they need to accelerate growth. But even for experienced professionals, the software selection process can be daunting, filled with pressure to find the right functional, technical, and financial fit for their organizations.

With our network of software reviews sites — Capterra, GetApp and Software Advice — and our service-based mindset, we answer the always-changing needs of modern business buyers so they can choose more confidently.

We stand for validated social proof. Authentic user reviews are the heart of our service. We help transparency and feedback thrive. From finding the best-fit product to learning from customers, everyone can benefit from the lived experience of others.

We activate software buyers. Our goal is to instill awareness and inform consideration — priming our audience to act. Whether reading our independent research, creating a shortlist, comparing features, or visiting a provider's website, our audience acts with intention.

We make it easier for software companies to attract and grow their next best customers. We've created a healthy marketplace based on quality and relevance, built with sophisticated auction technology that delivers audience reach, quality leads, and buyer intent data for digital marketers. Our premium advertising solutions are strengthened by the principle of improving buyer experiences and software company results.

With our network of sites spanning more than 30 countries, Gartner Digital Markets is where software marketers turn for insights into software buyer behavior around the world. Read on to understand the changing preferences of business buyers and discover the steps you need to take to power the moments where growth begins.

— Claire Alexander



9+ million
monthly visitors

1.5+ million
verified user reviews

1,200+
software categories

60
localized sites

Gartner Digital Markets

Capterra GetApp Software Advice



Overview

The ability to effectively manage projects, track progress, meet deadlines and stay within budget is a top priority for measuring success for many businesses. As a result, demand for project management software has surged across industries and shows no sign of slowing down.

The project management software market is booming. It is expected to be valued at $7 billion by 2026, moving at a compound annual growth rate (CAGR) of over 12%, according to Gartner's Enterprise Application Software Worldwide Forecast (full report available to Gartner clients).

Buyers' expectations from project management software are evolving due to technology advancements, more agile work environments, remote team collaboration, increased process standardization and optimized reporting. Project planning, task management, resource management, time and budget tracking, and risk management are some common features buyers seek when purchasing project management tools.

B2B software providers should know how to respond to changing trends in buyers' approach to technology investment. As part of the 2022 Global Software Buyer Trends Survey, Gartner Digital Markets surveyed business leaders from 25 countries to help software and SaaS providers navigate the shifts in B2B buyer behaviors and adapt their marketing and sales strategies accordingly. (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. Software vendors can use the insights to understand buyers' evolving needs at each stage and market their solutions more effectively. However, buyers' progression through the sales funnel is fluid and doesn't always occur linearly. Marketing and sales professionals should identify where their prospective customers are in the buying journey and then use these insights to supply the right information at the right time.



Key Highlights

- Over 85% of surveyed business leaders actively use project management software around the globe. Businesses in Portugal, France, Spain, Colombia and Poland have the highest software adoption rates.
- Attracting new customers and strengthening relationships with existing customers are the top priorities for businesses investing in project management software.
- Price, ease of use and functionality are the key factors influencing the selection of a software provider.
- Project management technology buyers rely heavily on software ratings or reviews sites to compare and get unbiased information on software products.
- IT teams lead the software purchase process in 41% of small businesses and 44% of midsize businesses.
- When purchasing software, buyers refer to online training (48%), video tutorials (43%) and user guides (42%) to assess the software provider more deeply.
- Buyers have a preference for better user experiences, data privacy, and training and support capabilities. At least 85% of respondents look for these features when selecting a project management software.

Inside This Report



Project Management Software Trends



Get to Know Project Management Software Buyers



Key Recommendations to Better Engage Project Management Buyers



Project Management Software Trends

Project Management Software at a Glance

Project management software is an umbrella term encompassing a range of solutions, from lighter task management tools to robust portfolio management solutions. Adaptive project management (APM) and reporting — one of the many distinct submarkets making up the overall project management space — enables change management and enhanced operability.

Trends Shaping Project Management Software Adoption

- **AI-enabled chatbots are gaining prevalence.** Chatbots are conversational user-interface technologies that automate project management processes such as scheduling meetings and generating reports. They help eliminate repetitive administrative tasks, making processes more efficient.
- **Businesses are gravitating more toward a responsible, accountable, consulted and informed (RACI) matrix-based approach.** The RACI matrix is a project management tool that categorizes stakeholders' roles and responsibilities for any specific activity or process, thus increasing process accountability and transparency.
- **Enterprise portfolio management offices (EPMOs) are embracing the use of multiple project and work management systems across their organizations.** They are also integrating these tools, as needed, with a separate strategic portfolio management technology for portfolio monitoring and decision making.
- **APM and reporting systems are gaining more popularity among domain-specific project management office (PMO) leaders.** Traditional project management practices and tools are becoming less effective. As a result, PMOs are rejecting them and turning to APM and reporting tools for improved performance.

Software solutions in the APM and reporting segment are highly adaptable and emphasize the automation of complex project and work execution activities to cater to the technology demands of project managers. APM and reporting software provides value by enhancing project selection procedures and supporting decision making.

Here's what an APM process workflow looks like:

Adaptive Project Management and Reporting Process Flow



Source: Gartner 2020



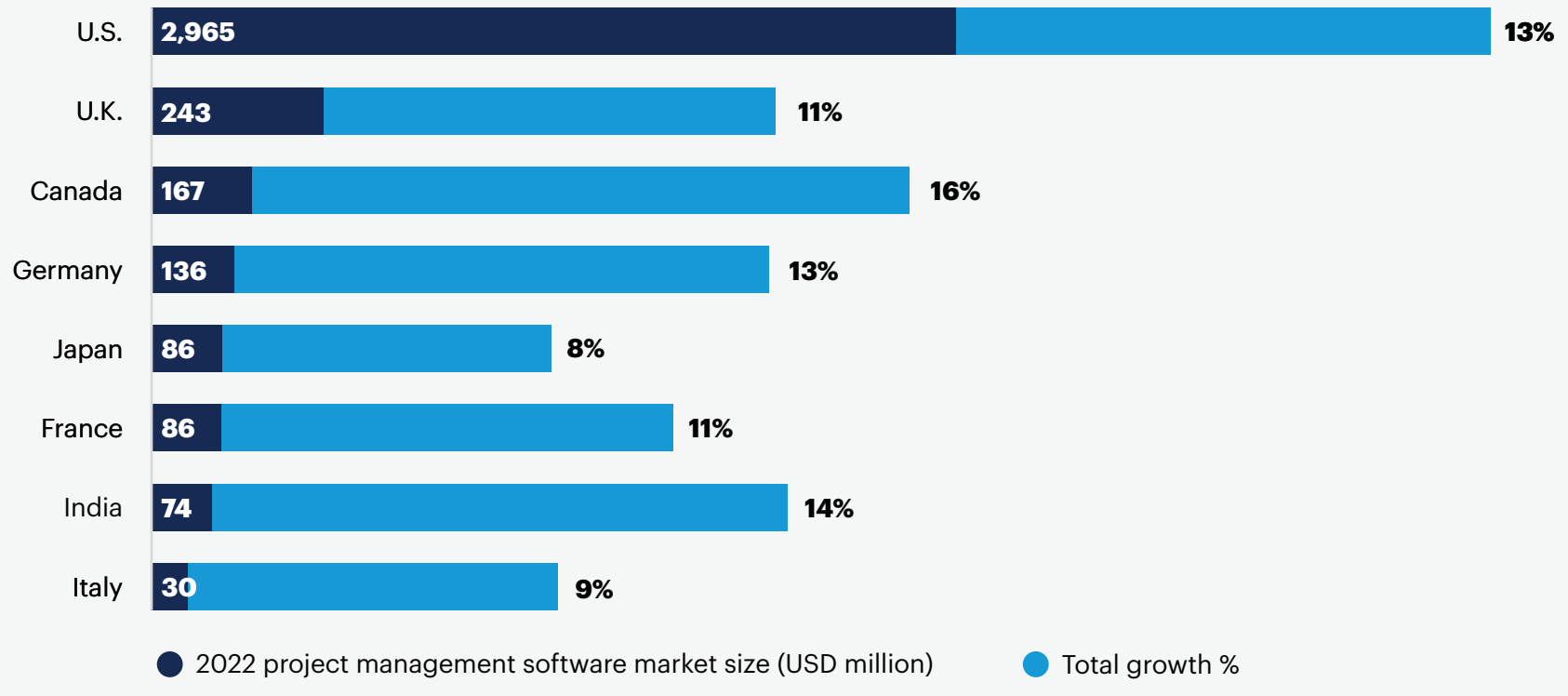
Get to Know Project Management Software Buyers

Understanding buyers' behavior, specific needs, concerns and how they make purchase decisions is crucial to build a viable go-to-market and sales strategy. This is especially true of the project management software space because it is one of the most demanding and competitive markets. Better understand project management software buyers with these survey findings.

Project Management Software Market Size

The project management software market size is estimated to be worth $4.62 billion in 2022, according to Gartner's Enterprise Application Software Worldwide Forecast (full report available to Gartner clients).

Here's how market growth is expected to vary across some prominent geographies:

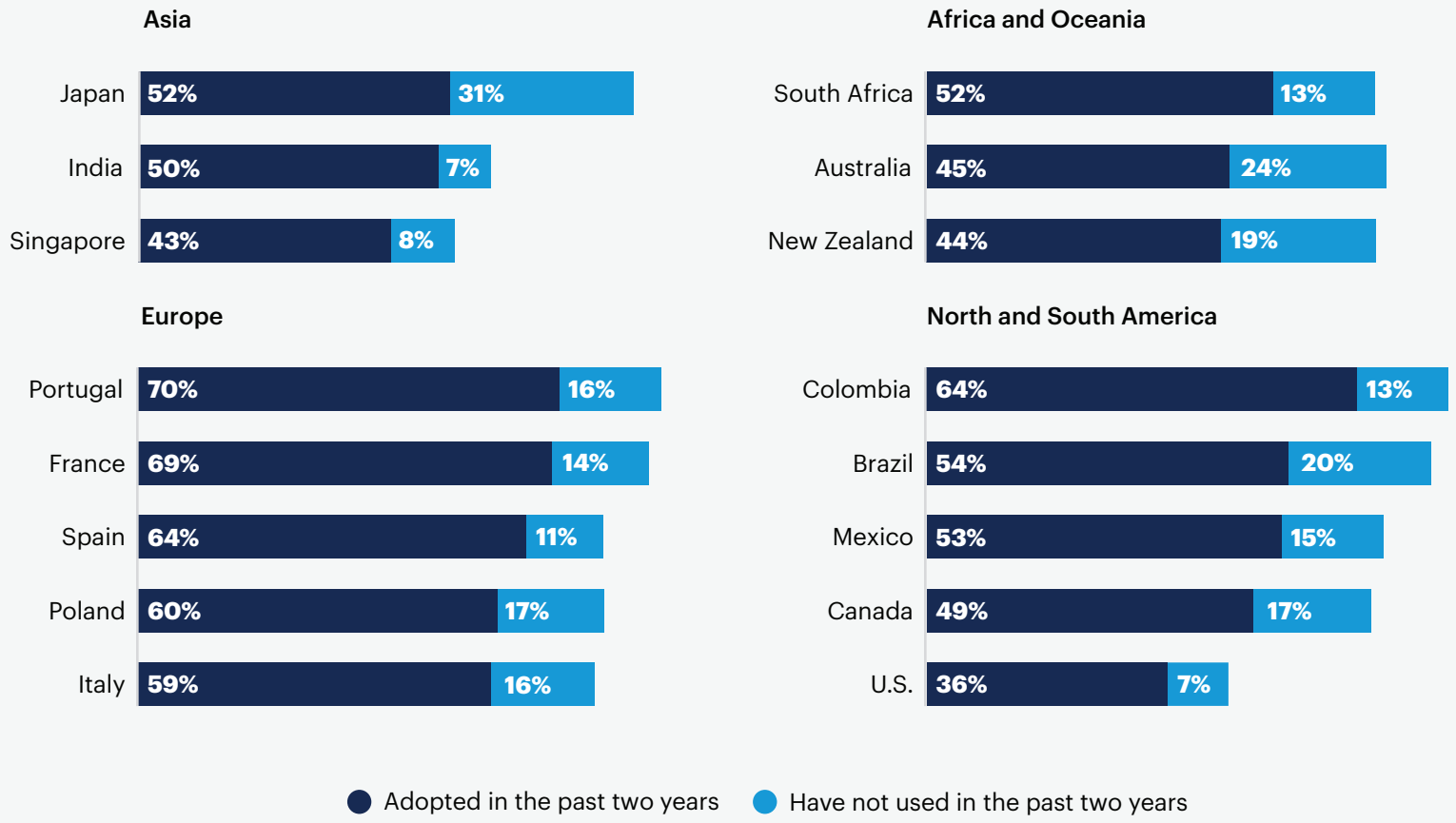


Source: Gartner's Enterprise Application Software, Worldwide, 2020-2026, 1Q22 Update

Global Project Management Software Adoption

Nearly 85% of surveyed business leaders use project management software, and over 53% have used it for temporary and/or permanent purposes in the past two years. Portugal, France, Spain, Colombia and Poland are the top five countries in software adoption. For software providers, these countries could be ideal destinations to expand their user base and market their products.

Project management software adoption, by region and country

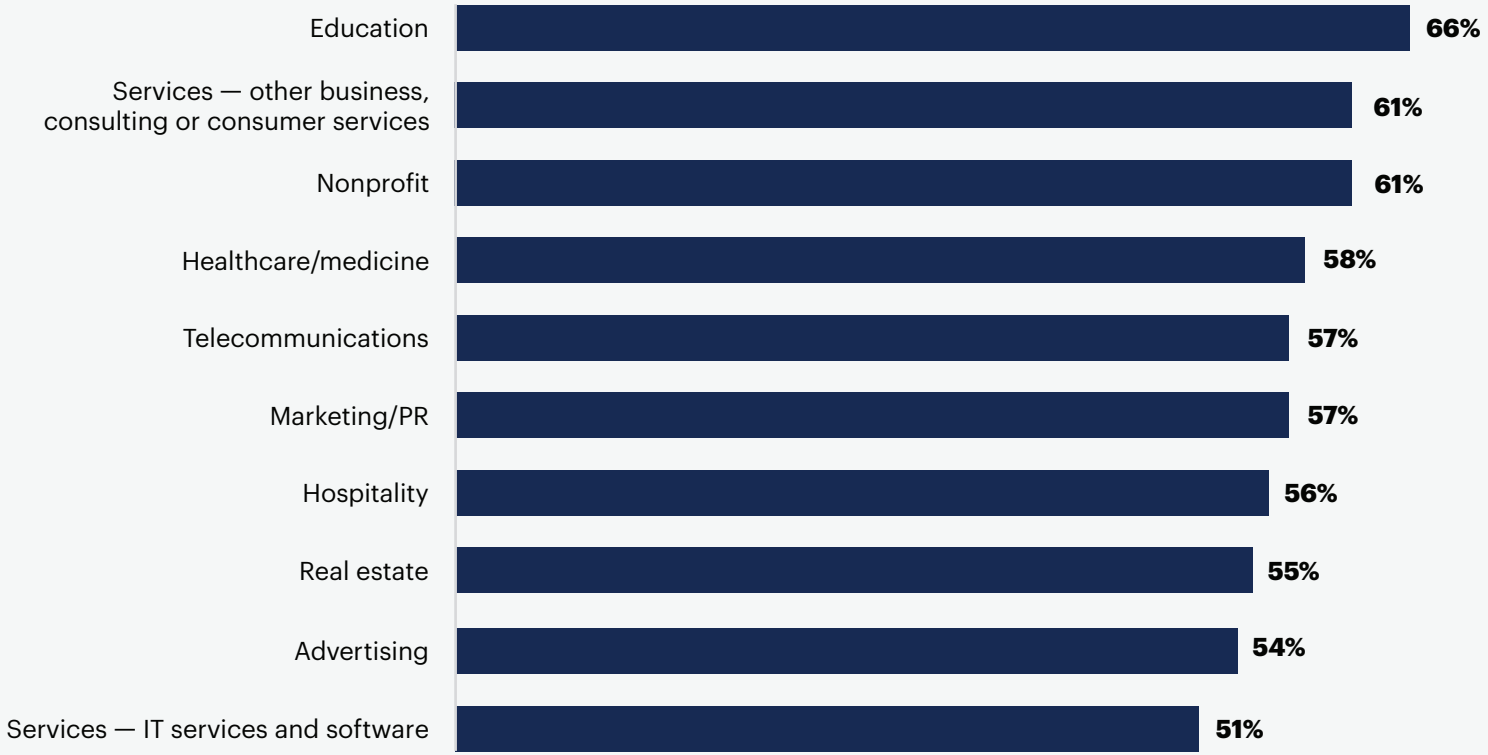


Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Q: Which types of software have you started using in the past two years, and how many do you intend to use permanently?

Software Adoption by Industry

Among the 26 industries surveyed, education, services (other business, consulting or consumer services) and nonprofit have the highest investment in project management software. In contrast, accounting, retail/food service and government have the lowest adoption rates.

Project management software adoption, by industry



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; 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 Buyers Aim to Increase Customer Base and Strengthen Relations

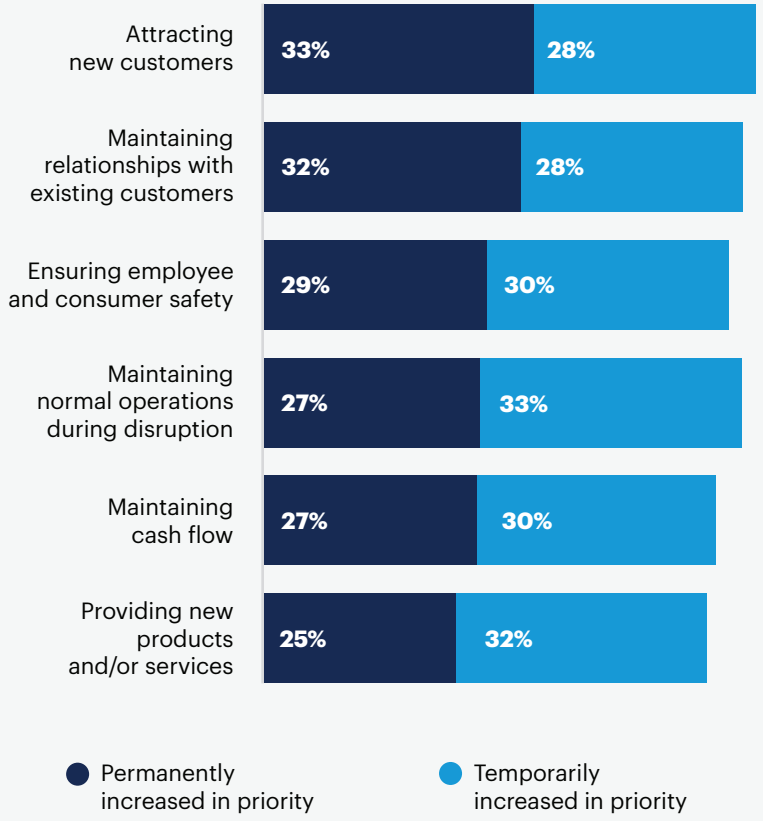
Increasing the customer base, strengthening existing customer relations and ensuring staff and consumer safety are the key objectives of project management software buyers. These are closely followed by ensuring normal operations during disruption and maintaining cash flow.

Key take-away

Highlight software functionalities such as customer relationship management (CRM) and customer success management (CSM) that allow buyers to achieve their objectives of attracting new customers and maintaining current relations. Boost demand generation to build brand awareness and land more project management software buyers.

Make sure your software allows buyers to easily create customer profiles and get a 360-degree view of customer interactions to foster relationships. It should also offer visibility into the project status and budget limits to help avoid overspending. And finally, include safety features such as two-factor authentication and fraud detection to prevent cyberthreats.

Top 6 business objectives for project management buyers in 2022



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management 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? Note: Percentages exceed 100% as respondents were asked to select multiple options.

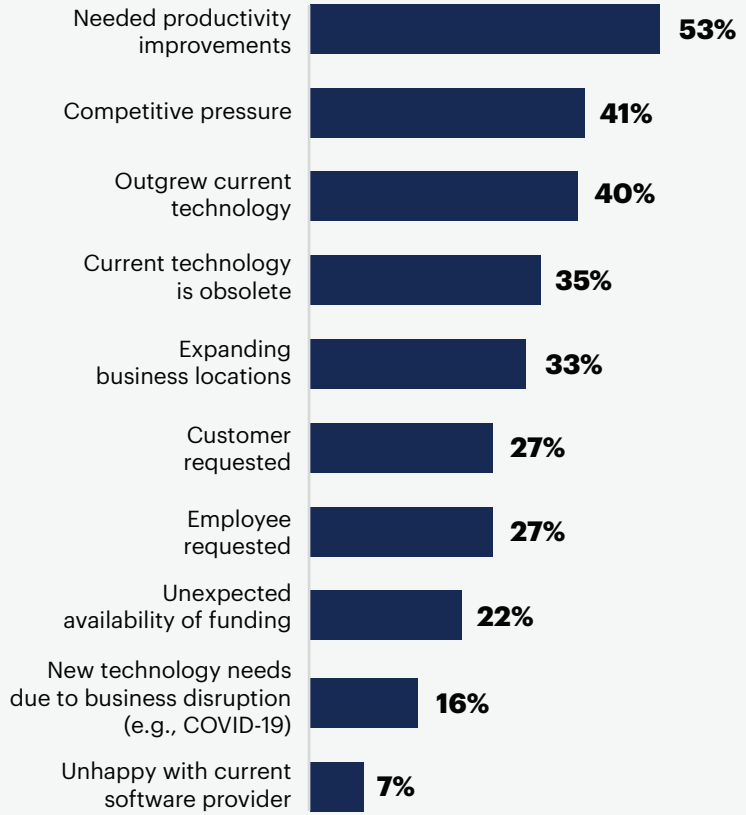
Productivity Enhancement Is the Top Factor for Purchasing New Software

The majority of survey respondents (53%) purchased project management software to boost productivity and business efficiency. Market competition (41%), constant technology advancements (40%) and outdated existing technology (35%) are the next top triggers for software investment.

Business disruptions due to events such as the global pandemic drove nearly 16% of respondents to invest in project management technology to improve operations and collaboration among teams.

Key take-away
Provide marketing materials such as case studies on productivity improvements and advanced functionalities to demonstrate your product's return on investment (ROI). Also, address the business disruptions caused by the pandemic to differentiate yourself from competitors.

Top factors that trigger investment in project management software

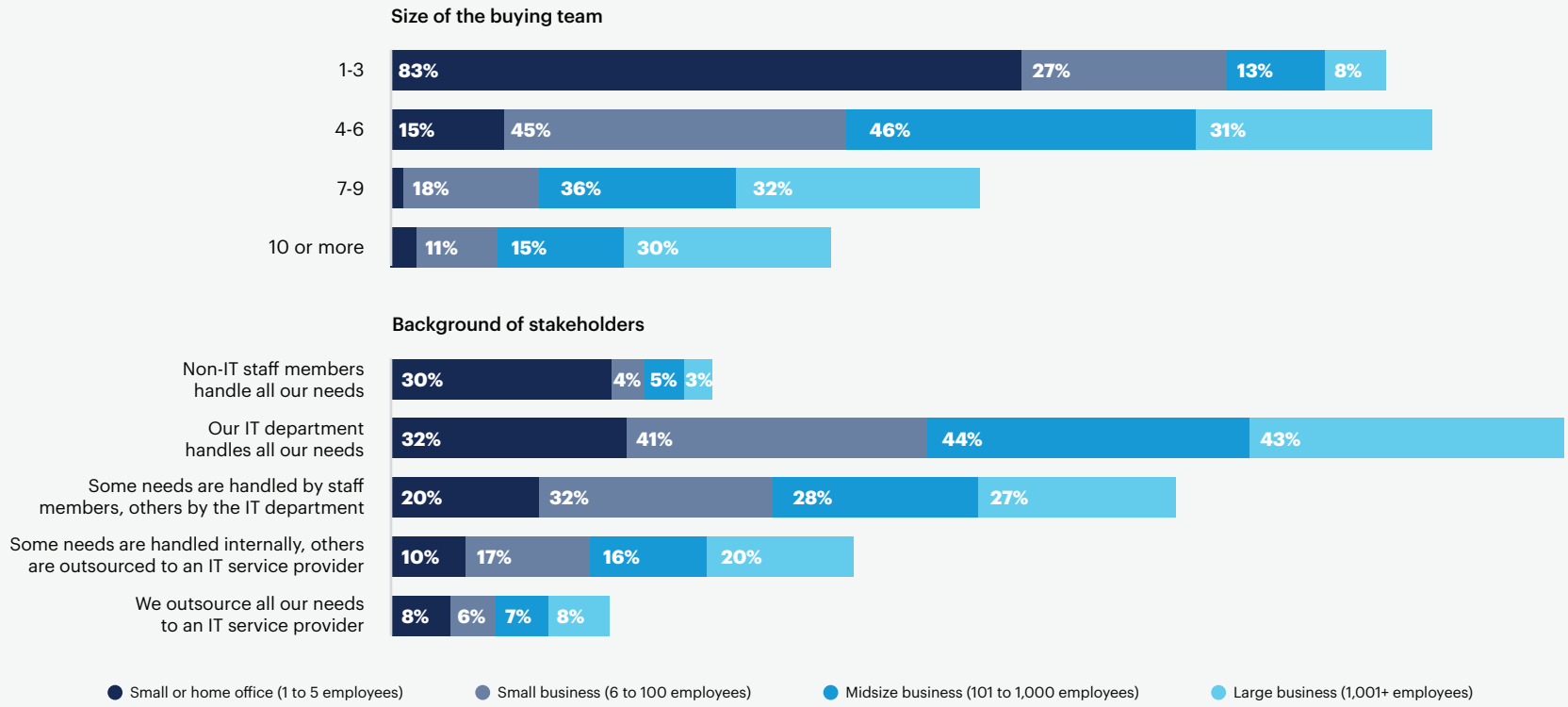


Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. Please select the top 3 factors that trigger your investment in new software; Note: Percentages exceed 100% as respondents were asked to select multiple options.

Buyers Heavily Rely on IT Department's Recommendations

When purchasing software, buyers place a great deal of trust in the expertise of their IT departments. More than 30% of small or home offices, 41% of small business and 44% of midsize business respondents say IT departments handle all of their technology needs.

Composition of project management software buying group



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software 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? Note: Percentages in the chart may not add up to 100% due to rounding.

Key take-away

Consider the various buyer personas within the IT department, such as CIO and application development manager, and differentiate your value proposition to connect with each unique persona.

Buyers Have an Affinity for Familiar Brands

Familiarity breeds trust and confidence. If customers already know a brand and have had a positive experience with it in the past, they are more likely to believe that the brand will deliver on its promises and provide good overall value.

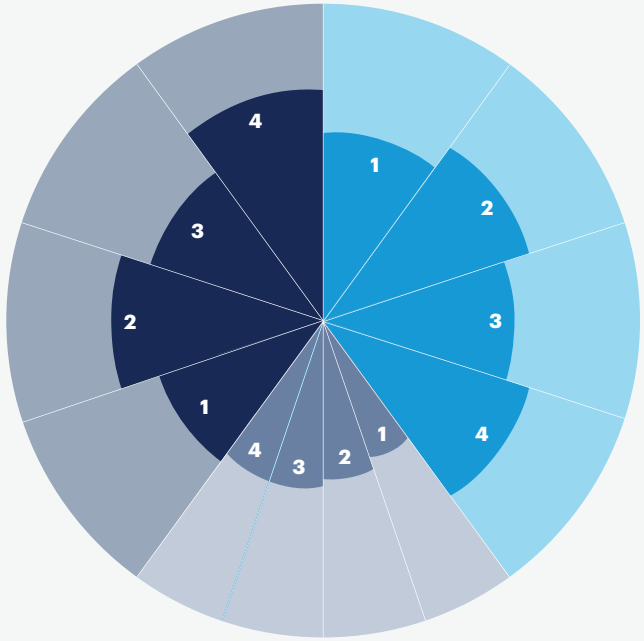
Buyers prefer well-known brands when investing in project management software. Nearly 39% of respondents prefer purchasing from vendors they have previously worked with, while 38% choose well-established brands over new or unfamiliar ones.

Key take-away

Build a strong brand reputation to influence buyers' perceptions and manage the conversations around your software offerings.

Look for ways to deepen users' engagement with your software. For example, you could offer exclusive content, discounts and early access to new software features. Additionally, focus on creating well-cultivated marketing and advertising plans to increase brand awareness among prospects.

Buyers' preferences when considering project management software providers



We prefer vendors we've already worked with (Overall - 39%)	We prefer well-established software brands (Overall - 38%)	We are open to any vendor with a solution that could meet our needs (Overall - 23%)
1. Portugal (46%)	1. France (48%)	1. U.S. (33%)
2. Netherlands (58%)	2. Norway (56%)	2. Denmark (35%)
3. Italy (48%)	3. Ireland (49%)	3. South Africa (38%)
4. New Zealand (62%)	4. Japan (56%)	4. Brazil (38%)

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. Which statement do you agree the most with when evaluating vendors for new software? Note: Percentages in the chart may not add up to 100% due to rounding.

Online Training Is the Preferred Content Type Among Buyers

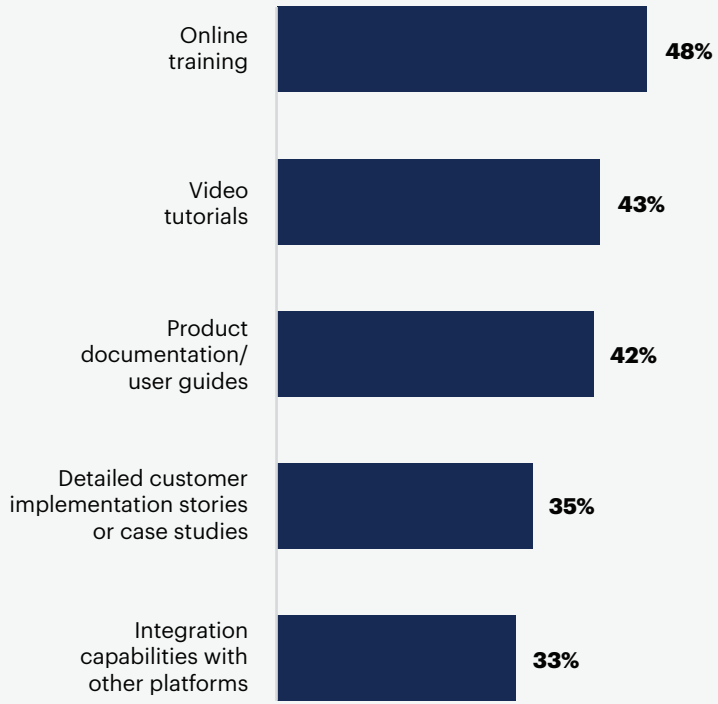
Project management software buyers seek content that is useful and convincing. Online training (48%), video tutorials (43%) and product documentation/user guides (42%) are the preferred content types, as these materials help buyers understand how to use the various features of a product.

Key take-away

Generate more midfunnel content such as demo videos, case studies, customer success stories and user guides to demonstrate your product's capabilities in real-world situations.

Provide helpful content, including product comparisons and detailed feature descriptions with use cases, to help buyers make sense of the options available. Also, ensure the content is easy to find and access when buyers search online.

Top 5 content types buyers use to make a purchase decision



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. Which of the following content have you ever used to help make a purchase decision? Note: Percentages exceed 100% as respondents were asked to select multiple options.

Buyers Seek Content in Their Primary Language

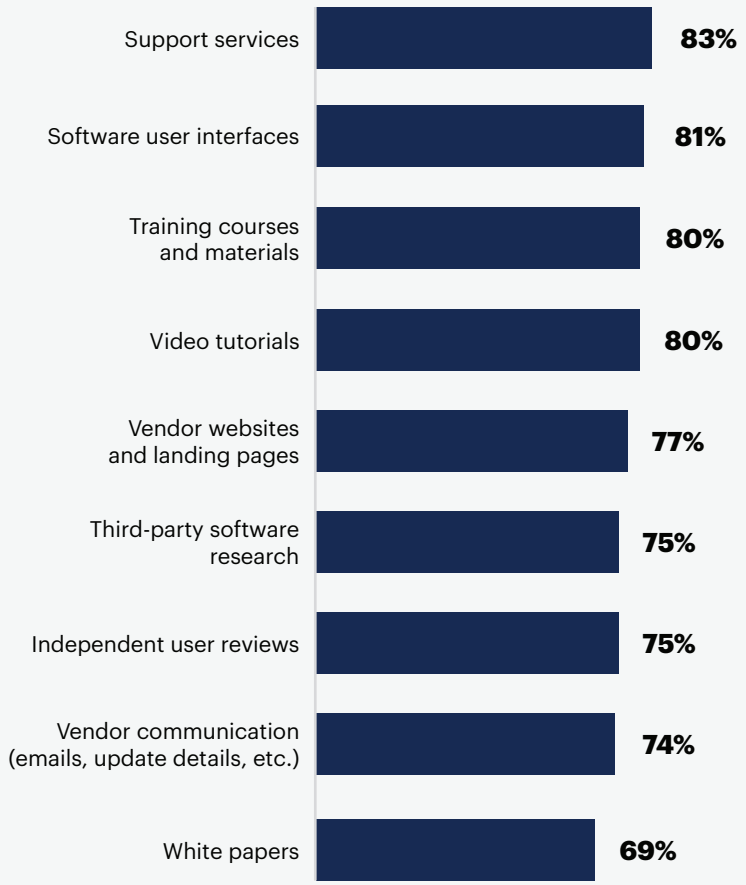
Software buyers feel more connected and understand context better when they read product information in their native languages. Although English is the most spoken language in the business world, it is not everyone's go-to language.

When asked about their preferred language when interacting with software providers or product content, most buyers say it is "moderately" or "very" important to have support services (83%), software user interfaces (81%), training courses and materials (80%) and video tutorials (80%) in their primary language.

Key take-away

Provide translated content to cater to the needs of global buyers and make them feel comfortable and confident about your software. This will also improve the chances of conversions. Consider the nuances of each global market and localize your messaging and marketing collaterals to address the unique challenges of each region.

Importance of offering content in buyers' primary language



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. How important is it to have the following types of content or interactions with a software provider in your primary language versus English? Note: Percentages exceed 100% as respondents were asked to select multiple options.

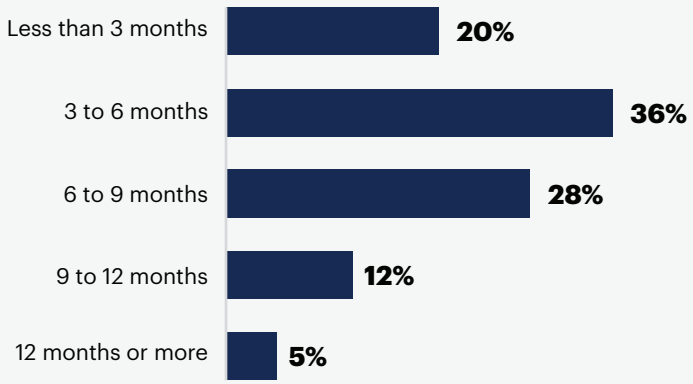
Most Buyers Take Months to Finalize a Purchase

From identifying a business need to selecting the final product, purchasing a project management software solution is a lengthy and complex process.

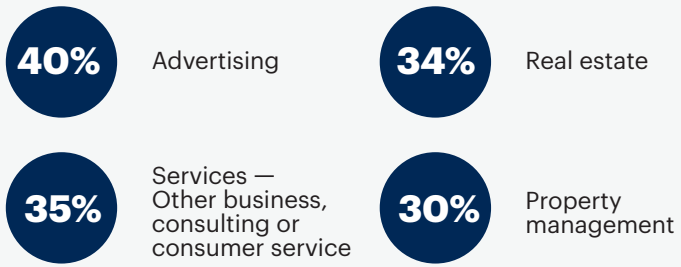
Over 35% of respondents spend three to six months researching and considering all options before finally settling on a software tool to purchase. Only 20% take less than three months to make a purchase decision.

Key take-away
Use a business case to demonstrate the ROI of your software product and gain buy-in from stakeholders. Leverage customer reviews and digital guided selling tools to increase buyers' confidence and sspeed up the decision-making process.

Length of the project management software buying cycle



Industries that frequently take less than three months to finalize a purchase



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. How much time does your business usually spend to evaluate, select and finalize a purchase for new software? Note: Percentages in the chart may not add up to 100% due to rounding.

Usability and Price Are the Key Factors for Purchasing Software

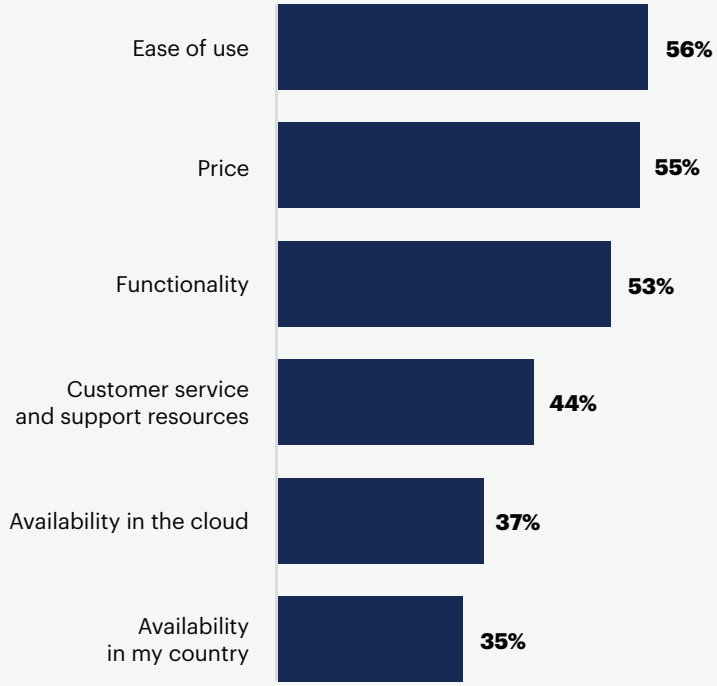
When making a purchase decision, buyers tend to focus on various factors. Ease of use is the main consideration (56%) due to business needs such as quicker deployment and shorter learning curves. However, it is not the only factor that customers take into account.

Price (55%) and functionality (53%) are the next top considerations. Price remains a critical factor due to reasons such as budget limitations and the need to get the best value for money. Similarly, functionality plays a vital role because features and workflows vary from one organization to another.

Key take-away

Offer a free software trial or demonstration so buyers get a clear understanding of your product's usability ahead of purchase. As per Gartner research, 80% of enterprise software providers include free trials in their business models.

Key purchasing factors for project management software buyers



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. When making a software purchase, which factors are most influential in your decision? Note: Percentages exceed 100% as respondents were asked to select multiple options.

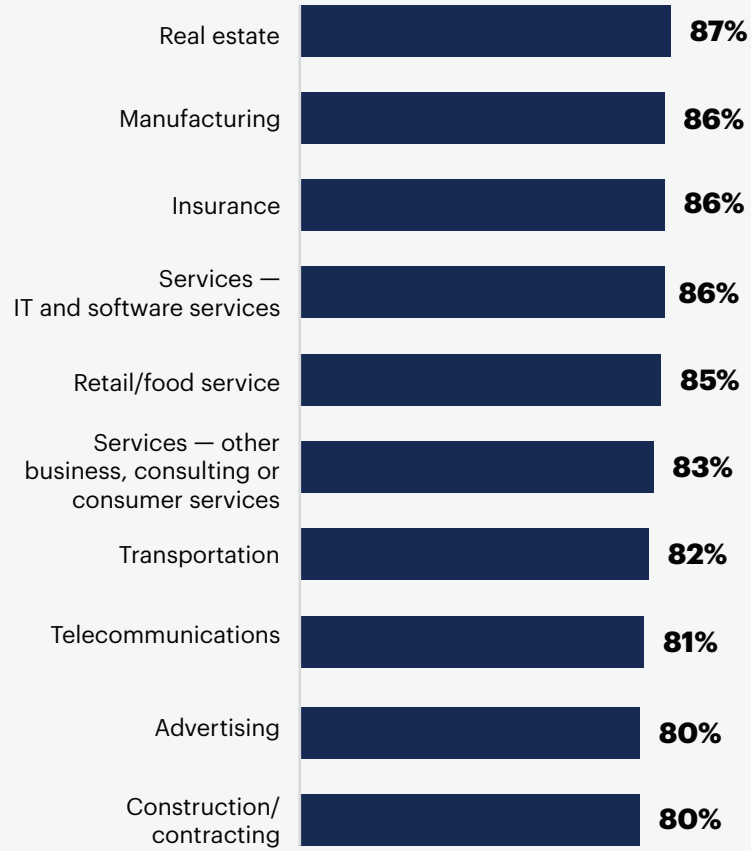
Decision Stage

User Reviews Significantly Influence Purchase Decisions

User reviews play a critical role in the software buying journey. Overall, more than 75% of project management software buyers consider user reviews "moderately" or "very" important because they provide insights into how a software platform performs in real-life scenarios.

Key take-away
Customer reviews are a powerful marketing tool to convince prospects and differentiate your software from market competition. Focus on collecting recent and authentic user reviews to boost your profile's visibility and build buyers' trust. This will help increase conversion rates, close deals faster and boost retention rates.

Value of reading user reviews, by industry



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. How important is reading user reviews before making a software purchase decision? Note: Percentages in the chart may not add up to 100% due to rounding.

Customer Support and Training Are Critical During Onboarding

Onboarding is a crucial part of the software purchase journey. It familiarizes users with the software they have purchased and informs them how to use it to its maximum potential. Customer support (55%), personalized training (50%) and customized implementation (46%) are the most valued factors during the onboarding process.

Key take-away

Optimize the customer onboarding process by mapping out the software buyer journey to lay the foundation for maximizing customer lifetime value and winning renewals. Set up an implementation team to work closely with buyers on software deployment and integration and to provide personalized resources to educate users about your product.

Onboarding expectations of project management software buyers



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. When adopting a new software solution, what do you value the most in the onboarding process? Note: Percentages exceed 100% as respondents were asked to select multiple options.

Integration Issues Are the Leading Cause of Buyer Churn

Around 15% of respondents look for alternatives before renewing their existing software. As a software provider, you must understand what makes buyers replace their existing solutions and learn from those failings.

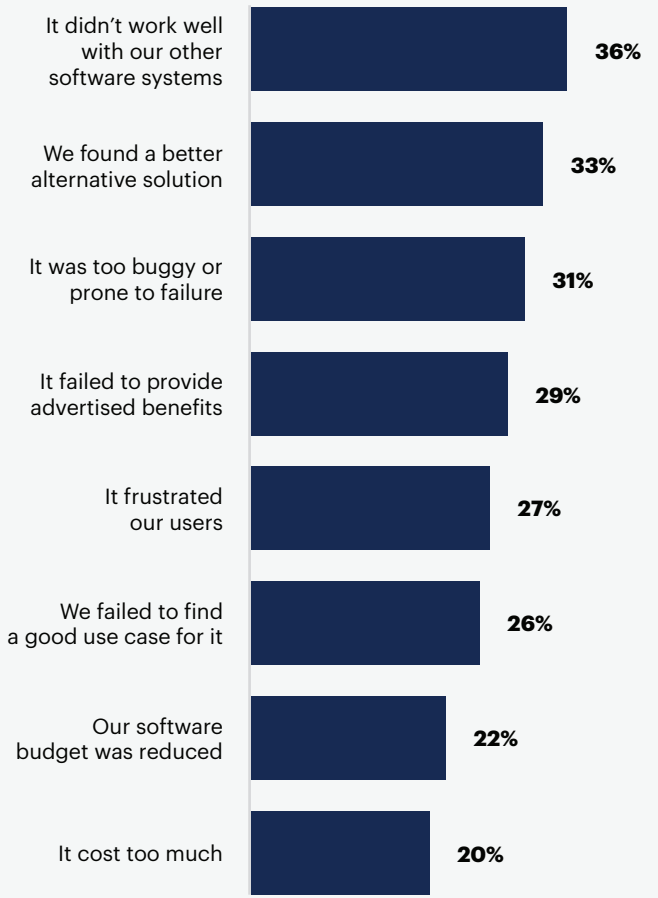
Integration issues with existing systems (36%) is the top reason for software replacement, closely followed by the availability of better alternatives (33%) and buggy products (31%). One or more of these factors could prevent buyers from taking full advantage of your software, leading to frustration and purchase regret.

Key take-away

In the initial marketing and sales efforts, provide adequate information about your product's integration capabilities to boost buyers' confidence in the purchase process, set the right expectations and avoid post-purchase regret.

In addition, continuously test your software for bugs and glitches, and leverage the voice of customers to make product improvements. You should also ensure your software offers the advertised benefits and value to customers, or you risk losing them to competitors.

Reasons buyers replace existing software



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. Why was the decision made to replace this software purchase with something else? Note: Percentages exceed 100% as respondents were asked to select multiple options.



Key Recommendations to Better Engage Project Management Software Buyers

1 Highlight the Security Capabilities of Your Software

Security concerns (17%) are the top challenge for project management software buyers. This could be due to the fear of data breaches or other security risks the technology poses. Compatibility with existing systems (16%), employee acceptance/training (15%) and justifying the investment (13%) are the other concerns buyers face when making a purchase decision.

Recommendation

Address security concerns by providing detailed information about how your software ensures data protection and look out for the impact of regulations such as the General Data Protection Act (GDPR), California Consumer Privacy Act (CCPA) and Personal Information Protection and Electronic Documents Act (PIPEDA).

Offer a free software demonstration so prospects see, firsthand, how it works and whether it is compatible with their existing systems. Finally, provide a cost-benefit analysis or ROI calculation to help prospects justify the investment to key decision makers.

Top 3 challenges for project management software buyers, by industry

Banking/financial

Security concerns (57%)
Justifying the investment (48%)
Compatibility with existing systems (44%)

Accounting

Compatibility with existing systems (60%)
Staff acceptance or training (44%)
Justifying the investment (37%)

Property management

Compatibility with existing systems (60%)
Staff acceptance or training (60%)
Justifying the investment (60%)

Government

Security concerns (69%)
Staff acceptance or training (54%)
Compatibility with existing systems (44%)

Real estate

Compatibility with existing systems (57%)
Security concerns (56%)
Staff acceptance or training (39%)

Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. Please select the top 3 challenges your organization faces when planning investment in new technologies. Note: Percentages exceed 100% as respondents were asked to select multiple options.

2 Establish Brand Presence on Buyers' Preferred Channels

The majority of buyers use software ratings or reviews sites (49%), calls with sales representatives (46%) and vendor websites (43%) to conduct initial research and gather information about software.

Recommendation

Most buyers prefer a self-guided technology search. Create product profiles on software review sites, such as Capterra, GetApp and Software Advice, to gain visibility among buyers that are actively searching for your software or service.

Also, make sure you secure top spots in these software directories with Pay-Per-Click and Pay-Per-Lead demand generation campaigns to reach your target audience faster. Then, establish a strong lead management strategy through timely, personalized customer communication.

Channels buyers use to get information on a software solution



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. Which channels do you prefer to use to obtain information about a software solution? Note: Percentages exceed 100% as respondents were asked to select multiple options.

3 Focus on the Features Buyers Care About

The majority of respondents consider user experience, data privacy, training and support services and cybersecurity to be the most important features in a project management software solution.

Recommendation

Optimize your product pages on Gartner Digital Markets' sites with detailed information about the software features and capabilities that buyers care the most about. Showcase how your product helps simplify tasks and improve workflows, and illustrate how user-friendly and easily navigable the software interface is.

Also, build industry- or role-specific case studies that demonstrate how your product's features help end users achieve their business objectives.

Features buyers seek in project management software



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,120; Base: Have adopted project management software in the past 2 years; Q. How important are the following features when evaluating software solutions? Note: Percentages exceed 100% as respondents were asked to select multiple options.

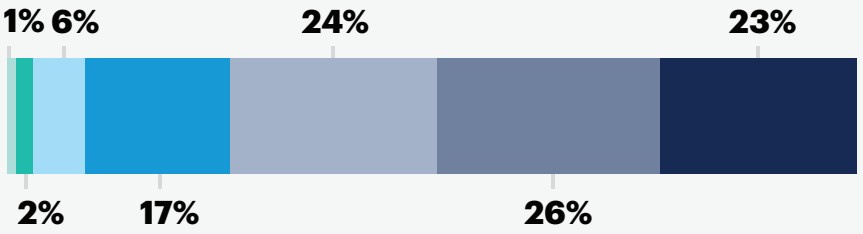
4 Build a Business Case to Encourage Technology Investment

Despite multiple stakeholders being involved in the purchase process, there is a consensus among surveyed business leaders that the software they purchased is a high-end, premium product (73%) and that the ability to have a trial period for a product and perform proof of concept (POC) is important during the purchase process (71%).

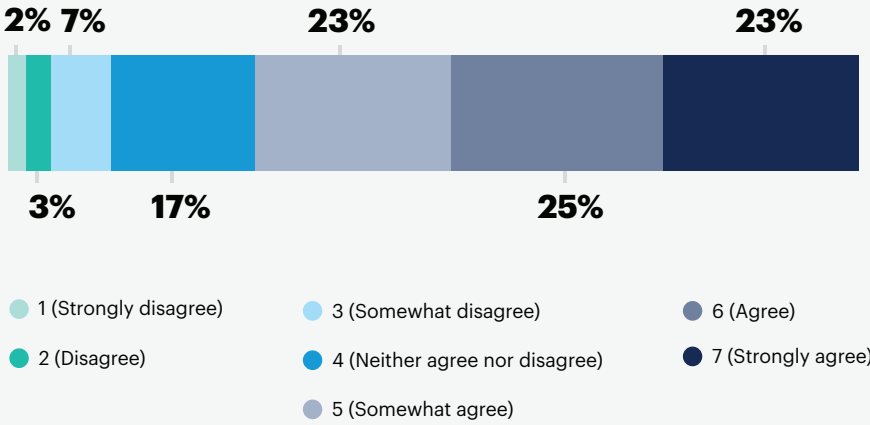
Recommendation

Proof of concept (POC) presentations and free trials increase buyers' confidence in the purchase decision. Select buyers for free trials by identifying buyer intent signals of an active buying cycle, such as engagement with midfunnel content and high website session duration. Ultimately, set up a free-to-paid conversion strategy to convert the free trial users into paid clients.

The software we purchased was a high-end, premium product



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



Source: Gartner Digital Markets 2022 Global Software Buyer Trends Survey; n = 2,028; Base: Have adopted BI and data analytics software in the past two years; Q: Which statement do you agree most with when evaluating vendors for new software? Note: Percentages in the chart may not add up to 100% due to rounding.



Smart Ways to Expand Your Reach

This report summarizes the most important insights from a Gartner Digital Markets survey to help project management software 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 on average three times the product profile page views. 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

Gartner Digital Markets is the world's most important resource for software vendors 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.

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