

Market Guide for Talent Acquisition (Recruiting) Technologies

Published 19 April 2022 - ID G00765182 - 16 min read

By Analyst(s): Rania Stewart, John Kostoulas, Emi Chiba

Initiatives: [HCM Technology Transformation](#); [HR Technology Strategy and Management](#)

Talent acquisition technologies are in high demand as a means to manage the fallout of an intensely competitive labor market. Application leaders should use this Market Guide to provide overarching context in addressing their organization's hiring optimization needs through technology.

Overview

Key Findings

- Despite increasing consolidation, the talent acquisition (TA) technologies market is very fragmented. Successful deployments build an ecosystem of recruiting technologies to meet organizational needs.
- Due to the pressing hiring needs for most organizations, the areas of new TA technology investment with the most potential for business value are passive-candidate sourcing, AI-enabled candidate skills matching, interview-related automation, and the overall candidate experience.
- Regardless of your current TA tech stack circumstance and/or embedded limitations, the TA marketplace offers a plethora of options ranging from point solution add-ons to broader talent acquisition, talent management, and human capital management (HCM) suite solutions.
- Leading organizations do not think of their TA strategies independently, but rather as vital components used to satisfy skill and talent demand across their organization.

Recommendations

As an application leader responsible for talent acquisition technologies, you must:

- Identify untapped areas of optimization opportunity by mapping existing TA technologies against the candidate-to-hire market landscape.

- Prioritize recruitment process automation opportunities by meeting with TA functional representatives to discuss current-day process flows against targeted improvement objectives.
- Contrast and compare vendor product options in prioritized opportunity areas by leveraging the representative vendors named here as a starting point for further evaluation.
- Connect TA technology objectives to the organization's overall skill and talent supply goals by reaching out beyond the TA function to include L&D, HR Ops, HRBPs and other relevant departments/roles.

Strategic Planning Assumptions

- By 2025, 60% of global midmarket and large enterprises will have invested in a cloud HCM suite for administrative HR and talent management. However, they will still need to source 20% to 30% of their HCM requirements via other solutions.
- By 2025, 30% of relevant providers will create a single talent network connecting previously disparate hiring pools (internal candidates, external employees, contingent workers, freelancers and alumni for example).
- By 2025, 20% of large enterprises will have deployed an internal talent marketplace to optimize the utilization and agility of talent.

Market Definition

The talent acquisition function has historically relied on an applicant tracking system (ATS) to meet the core tracking, posting and automation requirements of the requisition-to-hire process. As the TA function of many organizations has expanded to compete for talent, TA applications have evolved to cover a broader set of activities such as recruitment marketing, candidate relationship management (CRM), onboarding, and even internal talent marketplaces.

As a result, and in addition to a rich landscape of specialized point solutions, TA applications are on the market today in a variety of prepackaged suites that offer combinations of functions beyond “core” applicant tracking.

These “more in one” solutions are referred to as:

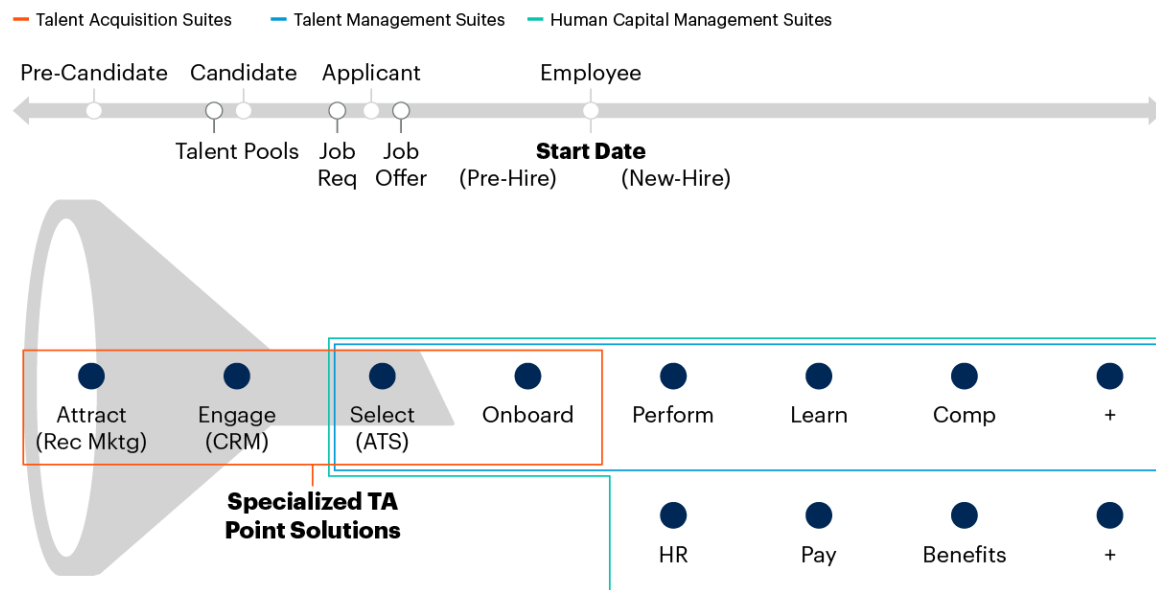
- Talent acquisition (TA) suites

- Talent management (TM) suites
- Human capital management (HCM) suites

Figure 1 illustrates a conceptual view of the TA technology ecosystem.

Figure 1: The Talent Acquisition Technology Ecosystem

The Talent Acquisition Technology Ecosystem



Source: Gartner
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Gartner.

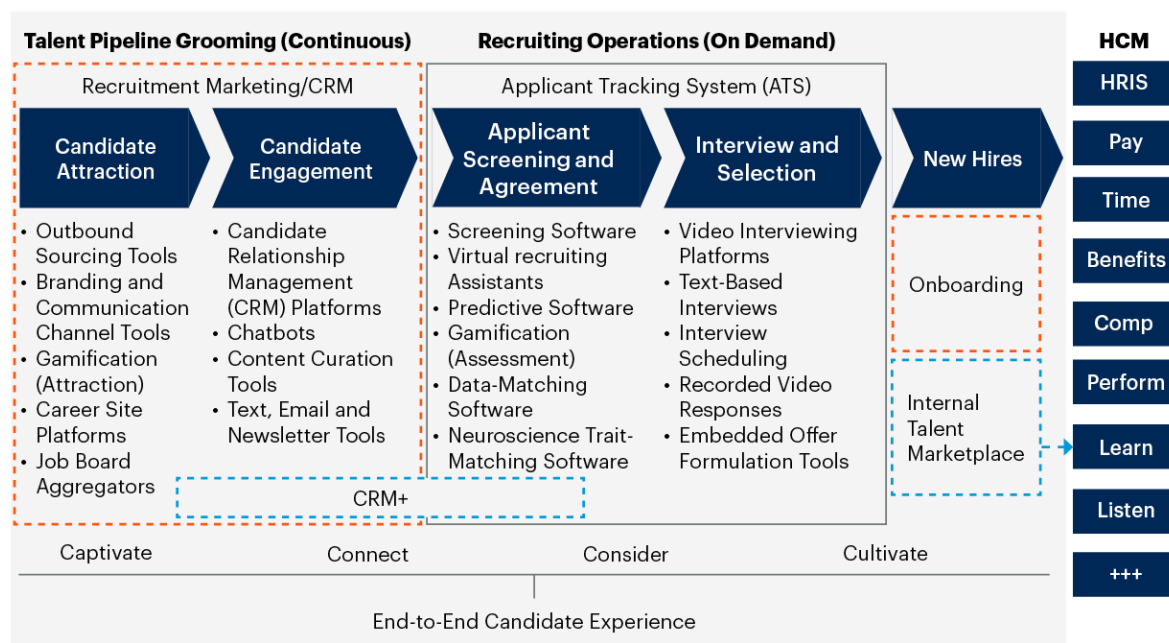
Market Description

Taking a closer look at the anatomy of the expanding talent acquisition landscape, Figure 2 provides application leaders with a drill-down view of the various functional categories and subcategories of tools available. While recruitment marketing, candidate relationship management, applicant tracking systems and onboarding applications bundle the most related tools within each respective functional category of the end-to-end candidate experience, they do not encompass all of what's on the market. Each itemized bullet is representative of a set of specialized point solutions that can further complement an organization's "core" TA tech stack as its recruiting automation needs evolve and mature.

Figure 2: Anatomy of the Talent Acquisition Technology Market

Anatomy of the Talent Acquisition Technology Market

- CRM + Expansion Trend
- Trending Investments



Source: Gartner
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TA Functional Categories

Candidate attraction and engagement: These categories include tools to support recruitment marketing, employer branding, candidate experience and sourcing effectiveness. The collective purpose of these capabilities is to continuously source, and connect with, both passive and active candidates as part of strategically relevant talent pools. This is so that when job requisitions are posted downstream, there's a ready pool of talent from which to curate, and you're not effectively starting from scratch. As competition for talent has become more intense, investment in these categories (particularly CRM) has shifted from a wish list capability for the TA function to a must-have commodity in many cases. Tables 1 through 3 note the relevant trending technologies.

Table 1: Trending Technologies: Candidate Attraction and Engagement

Candidate Attraction and Engagement ↓	
Packaged Offerings	<ul style="list-style-type: none"> ■ Recruitment marketing ■ Candidate relationship management (CRM)
Trending Technologies	<ul style="list-style-type: none"> ■ Text-based virtual assistants for tier 0, job-related questions ■ AI-powered skills matching to identify active/passive candidates ■ Smarter content curation tools to attract desirable talent profiles

Source: Gartner (April 2022)

Applicant screening and selection: These categories (see Table 2) include tools that aid recruitment teams in gaining operational efficiency once there's a point-in-time demand for talent (typically indicated by creation of a job requisition). They also include tools that enhance the candidate experience. One capability in particularly high demand since the increase in attrition influenced by COVID-19 and subsequent hiring boom is the AI-backed smart skills match capability. This is where skills inferred from the job requisition are matched against skills inferred from candidate resumes. Investing in this area of intelligent talent selection provides relief to recruiting operations in the form of better prioritization of more-qualified candidate applicants.

Table 2: Trending Technologies: Applicant Screening and Selection

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Packaged Offerings	Applicant Tracking Systems (ATS)
Trending Technologies	<ul style="list-style-type: none">■ AI-backed smart match used to prioritize “best fit” applicants■ Calendar scheduling automation (virtual assistant option)■ Next-generation assessments (industry/role specific)■ Video interviewing to support increased remote/hybrid work

Source: Gartner (April 2022)

Onboarding: Features at this end of the workflow address processes that bridge from offer to new hire. Standard onboarding capability focuses on transactional processing and compliance paperwork for Day 1/Week 1 readiness from offer forward.

This typically includes a combination of all of the following:

1. Forms Processing (National/Provincial/Local Compliance).

Example: Nationally-Mandated I-9 Verification (E-Verify) in the U.S.

2. Data Completion/Verification.

Example: Bank Account Information to Process First/Ongoing Paychecks.

3. Asset Provisioning.

Examples: Uniforms, Security Badges, Laptops, Application Access Credentials, etc.

4. Social/Cultural Assimilation.

Examples: Leadership Videos, Team Introductions, Learning Courses, Assigned Mentor, etc.

Enhanced onboarding goes significantly deeper on the social/cultural aspects of onboarding to include additional features such as persona-based multimedia messaging, bite-sized learning curriculum, and cultural immersion that extend well into the first six months of employment. As the TA function is becoming more influential in selecting technologies that influence the downstream employee experience and impact talent retention, many organizations are strategically increasing their investment in this area.

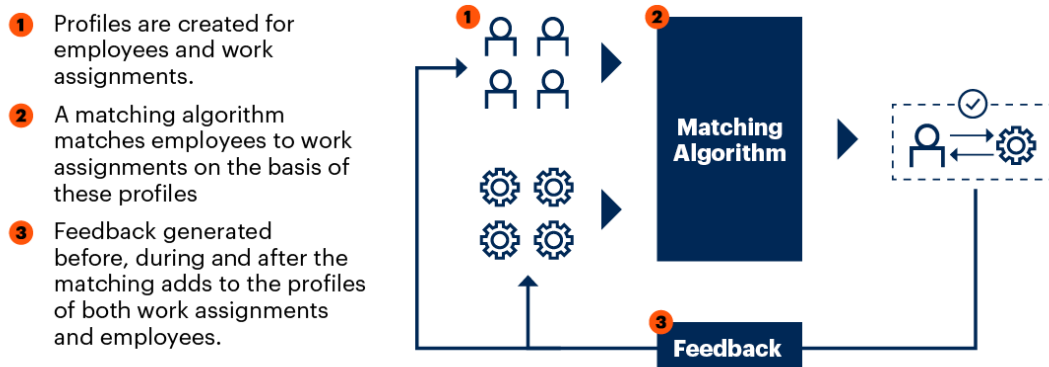
Table 3: Trending Technologies: Onboarding

Onboarding ↓	
Packaged Offerings	Preboarding/Onboarding, Cross-boarding, Offboarding
Trending Technologies	<ul style="list-style-type: none">■ Virtual onboarding facilitated by timely, persona-based nudges■ One-on-one personalized video content specific to new hire■ Embedded survey pulses and check-ins to dynamically adapt actions

Source: Gartner (April 2022)

Internal talent marketplace: This newest entrant to the talent acquisition market is focused on internal mobility but goes so far as to include tools that support career (macro) and related skill (micro) development of existing employees. Example capabilities (see Figure 3) include career path trajectories and project/gig/assignment marketplaces, as well as streamlined APIs to bidirectionally communicate and pull digital content from your organization’s learning management system/learning experience platform (LMS/LXP).

Figure 3: What Is an Internal Talent Marketplace?

Internal Talent Marketplace Process

Source: Gartner
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Many of the very same skills-backed AI technologies that help source external candidates for jobs can be similarly applied to sourcing existing employees, contractors and freelancers toward work assignments and projects. As a result, you see an increasing number of talent acquisition providers that are now offering this add-on capability. This is a leading example of how application leaders can connect the larger skills needs of their organization to other pools of talent supply. Gartner calls this approach “talent agility.”

Overall, the landscape of recruitment systems is best described as “a continuously evolving ecosystem of technology and service providers.” Application leaders must support a dynamic flow of processes and data across multiple systems, whether these are incumbent solutions or specialist applications that compete in the market.

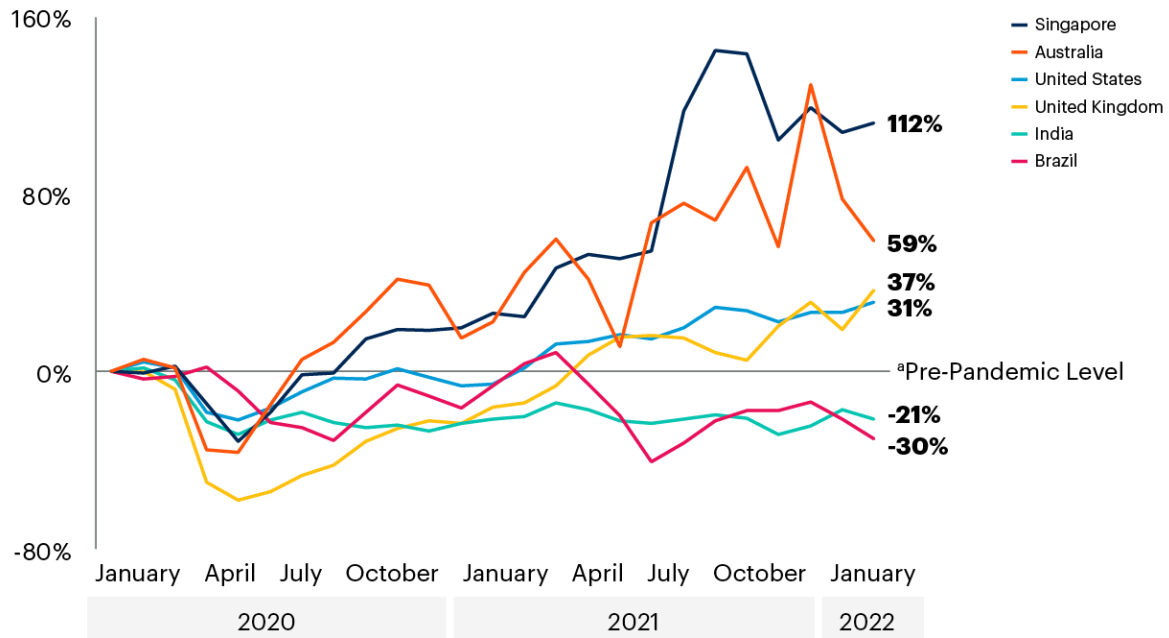
Market Direction

Gartner views TA applications as a subsegment within the broader HCM market. Gartner market share data for 2021 reported that the HCM application market amounts to \$21 billion (in constant currency) with 11% year-over-year growth. From a geographic perspective, we see the most demand and adoption of TA applications from within the Americas, followed by EMEA and the APAC regions (see Figure 4).

Figure 4: Talent Demand Fluctuations Across the Globe

Talent Demand Fluctuations Across the Globe

Month-on-Month Job Post Volume Normalized as a Percent Change From the Job Post Volume Seen in January 2020



Source: Gartner TalentNeuron
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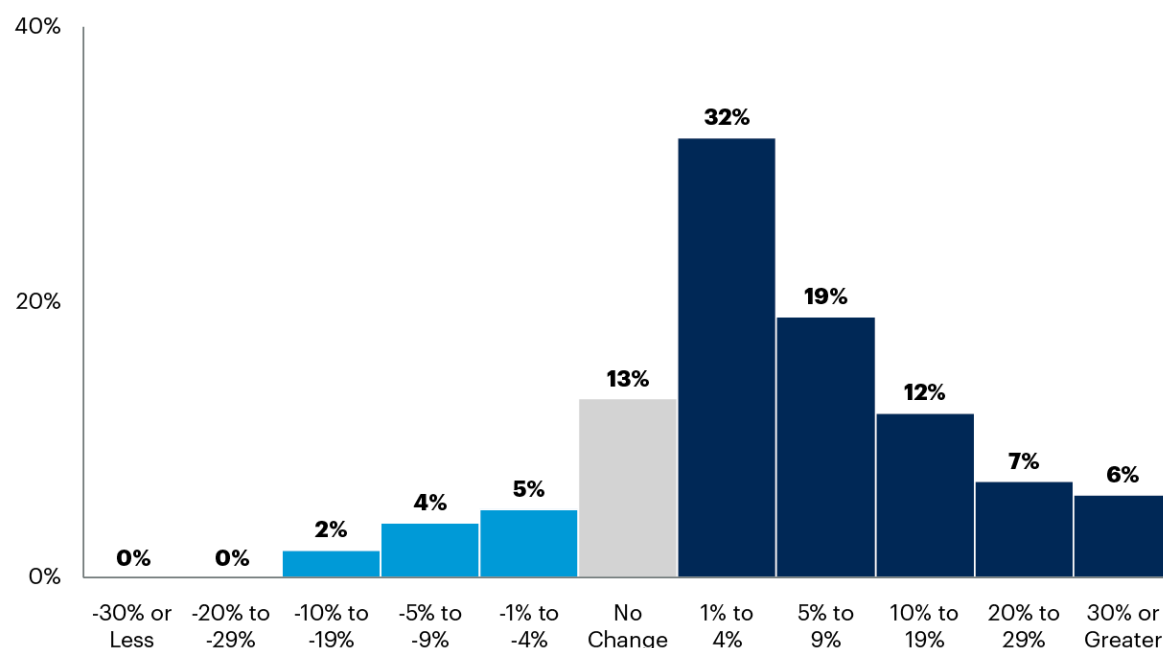
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Helping drive additional tech spending is the unprecedented churn in the labor market coupled with continued global talent shortage. Figure 3 shows how the U.S., U.K., Australia and Singapore continued to see talent demand well above prepandemic levels from December 2021 to January 2022. In turn, 76% of HR leaders who completed Gartner's 2022 HR Budget and Staffing Benchmarking Survey expect headcount to increase well into 2022, with turnover remaining high (see Figure 5).

Figure 5: Gartner 2022 HR Budget and Staffing Benchmarking Survey

Gartner 2022 HR Budget and Staffing Benchmarking Survey

Percentage of HR Leaders Selecting Expected Changes to Company Headcount



n = 108

Source: 2022 Gartner HR Budget and Staffing Benchmarking Survey

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Market Analysis

One of the key decisions for application leaders focused on selecting TA applications is about which combination of packaged offerings make the most sense for their organization's recruiting needs.

There are two primary questions to consider:

1. Which categories/subcategories of TA technology will address my organization's prioritized recruiting automation needs (in other words, where do we need to apply more/better automation in response to increased hiring targets, process bottlenecks and better talent sourcing?).
2. Which vendor(s) within those prioritized categories/subcategories are right for my organization (in terms of strengths, industry, size-segment, geography, integrations with incumbent solutions and cost, time)?

This Market Guide provides the tools and information you need to address the first question, along with a head start toward an initial list of vendors to help answer the second. We encourage you to reach out to a Gartner expert to help accelerate your search toward a tailored shortlist that best suits your needs.

Applicant Tracking System (ATS)

ATS solutions are well-established in the market and an integral function to most any TA tech stack. They have a long history of driving efficiencies in TA processes by supporting recruiters in managing the requisition-to-hire process (several ATS solutions are sold as stand-alone solutions, however it's increasingly rare that an ATS will meet your organizational needs on its own).

Key Insight: Stand-alone ATS solutions are more often best suited to SMB markets (with less than 300 employees).

Candidate Relationship Management (CRM/CRM+)

Due to the focus in the market on candidate experience and persona-based design processes for attracting and engaging critical talent, these capabilities are increasingly being seen as a “must have” instead of a “nice to have,” and are of high interest based on Gartner inquiry. Conceptually speaking, the role CRMs play is not just in attracting candidates (recruitment marketing), but with the pivotal goal of converting candidates into engaged applicants. CRM systems are present in the market as stand-alone solutions, but many TA, TM and HCM suites have taken steps to develop their own capabilities or acquire and integrate CRM solutions into their platforms. For more specific discussion of the TA CRM market, see [Innovation Insight for Candidate Relationship Management](#).

Key Insight: Many of the most notable CRM solutions have extended their offerings to deliver AI-based skills matching intelligence as a means of providing recruiters a shorter list of the “better matched” candidates.

Talent Acquisition (TA) Suites

These more recent solutions are a dedicated suite with integrated support for recruitment marketing, candidate engagement, and applicant tracking. They offer a depth of capability specifically for TA and contain enhanced capabilities for talent attraction, embedded insights, mobile interfaces and rich partner marketplaces to extend into specialized TA point solutions (prepackaged OTS APIs). Note, however, that onboarding, if offered, is typically minimal and insufficient to support more than Day 1 needs.

Key Insight: TA suites typically offer the best balance of breadth, depth and integrated capabilities to support fast-growing organizations.

Talent Management (TM) Suites

These include TA modules that are connected to other posthire talent processes (learning, performance management or compensation management, for example). They offer strength in combining cross-referenced HR workstreams and data for TA and TM. For example, onboarding modules within a TM suite help bridge recruitment modules with learning modules to create an onboarding experience that includes training and moves beyond Day 1.

Key Insight: TM suites frequently do not include robust candidate engagement and marketing. Their TA functionality, while competitive, often lags more dedicated TA solutions.

Talent Acquisition Module in an HCM Suite

These solutions help companies consolidate functionality into even fewer applications and integrations by connecting TA processes with both TM and core HR (see Figure 2). They effectively extend the view of the process into the overall employee life cycle. For example, it's an advantage unique to HCMs with how easily requisitions can tie to positions and thereby enable tighter headcount budget control and oversight. However, with TA being a more external-facing HR process, some additional layered point solutions may still be needed to enhance a TA module with an HCM suite. Most TA offerings from HCM suites are not sold stand-alone and are designed to work as part of the broader suite.

Key Insight: HCM TA modules often do not go as deep into TA processes but provide greater breadth in the form of an integrated data model, reporting framework, and user experience.

Key Criteria for Comparing Talent Acquisition Technologies

Candidate experience: Candidate experience has become a key talent metric and an industry benchmark. Today's applications are continuing to build on the evolution of TA technology — marketing functionality, e-commerce functionality, personalization, customization, responsiveness and user experience (UX) (see [Build the Candidate Experience Equation Into Your Talent Acquisition Processes](#)). Many TA applications have taken efforts to ease the experience for applicants submitting information with quick-apply features and virtual assistants. Additionally, to enhance engagement and recruitment operations, many vendors have incorporated campaign and personalization tools as well as service delivery functionality to monitor and track activity.

Process efficiency: Automation and productivity tools have been benefiting organizations for some time. In addition to improving the experience for candidates, process efficiency creates workflows that reduce timelines and incorporate technology as processes can now progress without being driven by a recruiter. Enhanced automation is appearing across TA applications in the form of automated sourcing and matching capability, candidate-status-driven actions and automation, and real-time metrics, dashboards, and insight. This frees up recruiters from researching prospects and monitoring systems all day and enables them to spend time engaging with the right candidates at the right time.

Technology and innovation: Focusing on recent market updates and capabilities through innovation, the latest wave of features and functionalities that are transforming TA technology focuses on embedded AI and ML for automation and personalization. These technologies are poised to alter how the TA function achieves targeted outcomes regarding overall process efficiency, time, cost and quality of hire, candidate experience, and diversity and inclusion. For more specific discussion of the use of AI in talent acquisition, see [AI Use Cases in Human Capital Management Technology](#).

Strategic alignment: Skills are fast becoming the main talent-related currency in terms of hiring, workforce planning and optimization, career development, talent marketplaces, and learning. The reskilling and upskilling of talent has been the No. 1 topic of focus for HR leaders, according to Gartner's annual survey, for four consecutive years (see [Top 5 Trends and Priorities for HR Leaders in 2022](#)). As a result, TA technologies are no longer a stand-alone purchase, but need to be evaluated in conjunction with technologies that deal with career and development of employees and with hiring of other worker groups (such as contractors, freelancers and consultants).

Representative Vendors

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

Market Introduction

The vendors listed in this Market Guide do not imply an exhaustive list and only represent the most visible bundled-capability providers (point solutions, for example, are not represented). This section is intended to provide more understanding of the market and its offerings (see Note 1).

Table 4: Representative Vendors in Talent Acquisition Technologies
(Enlarged table in Appendix)

Vendor Name	Vendor Products	Product Category
ADP	ADP Talent Acquisition	HCM Suite
Ascendify	Ascendify Talent Acquisition Suite	TA Suite
Avature	Avature Platform	TM suite
Beamery	Beamery Talent Lifecycle Management	CRM+
Beisen	iTalentX	TA Suite (Region: APJ)
Breezy	Breezy	ATS
Ceridian	Ceridian Dayforce	HCM Suite
Cornerstone	Cornerstone Recruiting Suite	HCM Suite
Eightfold AI	Talent Intelligence Suite	CRM+
Eploy	Eploy	TA Suite (Region: EMEA)
Freshworks	Freshteam	TA Suite (Region: APJ)
Gem	Talent CRM	CRM
Greenhouse	Greenhouse Recruiting, Greenhouse Onboarding	TA Suite
sympler	Talent Management Solutions	TM Suite (Industry: Healthcare)
ICIMS	ICIMS Talent Cloud	TA Suite
Infinite	Infinite BrassRing Platform	TA Suite
JazzHR	JazzHR	ATS
Jobvite	Evolve Talent Acquisition Suite	TA Suite
Lever	LeverTRM	TA Suite
Manatal	Manatal Recruiting	ATS
Oleeo	Oleeo Recruit, Oleeo Engage	TA Suite
Oracle	Oracle Recruiting	HCM Suite
PageUp	PageUp Talent Acquisition Suite	TM Suite
PeopleFluent	PeopleFluent Recruitment	TM Suite
Phenom	Phenom CX, Phenom RX, Phenom EX	CRM+
Radancy	Radancy Platform	CRM
SAP SuccessFactors	SAP SuccessFactors Talent Management Solutions	HCM Suite
SilkRoad Technology	Silkroad Recruiting and SilkRoad RedCarpet Onboarding	TM Suite
SmartRecruiters	SmartRecruiters Talent Acquisition Suite	TA Suite
softgarden	softgarden Talent Acquisition Suite	TA Suite (Region: EMEA)
Symphony Talent	Talent Marketing Platform	CRM
Cegid	Cegid Talentsoft	HCM Suite
Tribepad	Tribepad Talent Acquisition Platform	TA Suite (Region: EMEA)
UKG	UKG Ready Recruiting, UKG Pro Recruiting	HCM Suite
Workable	Workable Platform	TA Suite
Workday	Workday Recruiting	HCM Suite
Yello	Yello Recruitment Software	CRM+

Source: Gartner (April 2022)

Figure 5 illustrates four actions every application leader must take

Figure 5: Four Actions Every TA Application Leader Must Take**Four Actions Every TA Application Leader Needs to Take**

Source: Gartner
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Market Recommendations

Application leaders responsible for talent acquisition technologies must:

- Identify untapped areas of recruiting automation opportunity by mapping your existing TA technologies against the anatomy of the TA market (see Figure 2). This report provides you with illustrations that can be downloaded and marked up to reflect the current versus potential future states of your TA tech stack.
- Prioritize recruitment process automation opportunities by meeting with representatives of your recruiting function to discuss current-day process flow against targeted change/improvement measures and KPIs. This will be vital in helping decide which capabilities are the most valuable to pursue.
- Contrast and compare vendor product options in prioritized opportunity areas by leveraging the named representative vendors information herein as a starting point. Note that there are many vendors on the market and this report does not capture them all.

- Evaluate how your TA technology objectives connect to the overall skill and talent supply objectives of your organization that reach beyond the TA function (into L&D, HR Ops and HRBPs, for example). No decisions in your world are made in a vacuum, so solicit thinking partners to help dot connect your various digital strategies in this larger employee experience space.

Note 1

Representative Vendor Selection

The vendors included (see Table 4) cover a cross-section of packaged offerings, delivery methods, customer size and global scale. Data gathering was done via secondary research. Vendor inclusion was determined based on market share, geographic coverage, packaged solutions and Gartner customer inquiry data and vendor responses.

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[Business Outcomes Are the Milestones on an Application Strategy Roadmap](#)

[AI Use Cases in Human Capital Management Technology](#)

[Innovation Insight for Candidate Relationship Management](#)

[Innovation Insight for Internal Talent Marketplaces](#)

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sympler	Talent Management Solutions	TM Suite (Industry: Healthcare)

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Infinite	Infinite BrassRing Platform	TA Suite
JazzHR	JazzHR	ATS
Jobvite	Evolve Talent Acquisition Suite	TA Suite
Lever	LeverTRM	TA Suite
Manatal	Manatal Recruiting	ATS
Oleeo	Oleeo Recruit, Oleeo Engage	TA Suite
Oracle	Oracle Recruiting	HCM Suite
PageUp	PageUp Talent Acquisition Suite	TM Suite
PeopleFluent	PeopleFluent Recruitment	TM Suite
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