G2

2025 Buyer Behavior Report™

AI Now Means *Always Included.*

> **AI now stands for Always Included.** *It's a consistent ingredient along the software buying journey, and for sellers, it should become their primary focus if they want to succeed in this new reality.*

Tim Sanders
VP of Research Insights at G2

Artificial Intelligence (AI) is no longer hype. It's now infused into our workflows and deeply influences our business strategies. AI now stands for Always Included. It's a consistent ingredient along the software buying journey, and for sellers, it should become their primary focus if they want to succeed in this new reality. Gone are the days of wait-and-see. Much like we will never return to using fax machines and pagers, we will never return to doing business without AI by our side.

Data tells a powerful story. In addition to our annual survey of B2B software buyers, we are employing G2 Data to enrich the insights in this report. We've also applied AI to our research like a seasoned chef uses butter to make everything sing. It's helped inform our focus, shape our annual survey, analyze the results, and visualize the insights.

One thing rises to the surface: Software sellers need to personalize their go-to-market (GTM) tactics to connect with ever-changing buyer personas, sentiments, and behaviors. One-size-fits-all approaches will no longer work. AI's influence ranges greatly across regions, company sizes, and personas. This changes the recipe for success from consistency to adaptability.

This report serves up a menu of what's shaping the software market and how to stay ahead. Put these insights to work to meet buyers where they are, earn your seat at the table, and build lasting relationships in a market transformed by AI.

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AI continues to accelerate software spend.

AI continues to drive substantial growth in software investments, promising significant gains in productivity, cost efficiency, and enhanced decision-making. Looking ahead to the next 12 months, technology and software spending momentum is picking up speed, driven largely by AI's expanding role in business transformation.
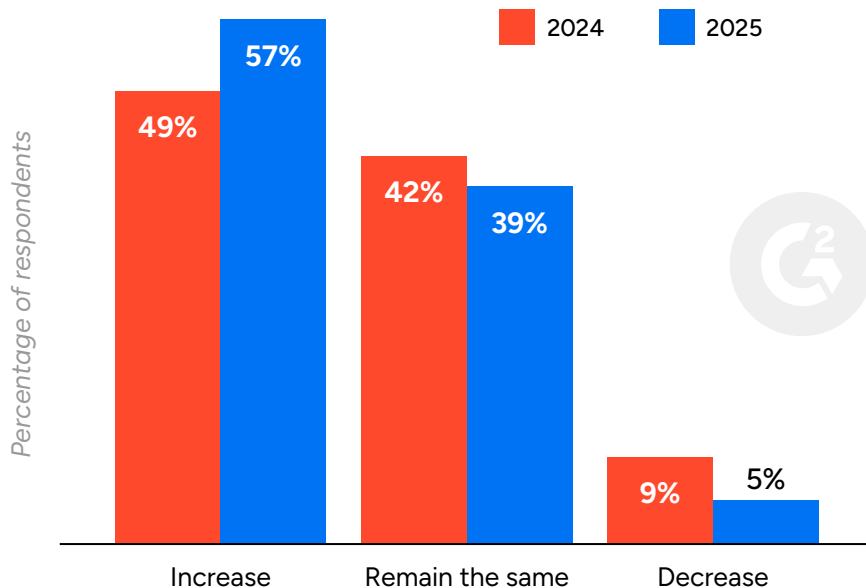
Compared to the insights from G2's 2024 Buyer Behavior Report, this year's findings reveal an impressive 8 percentage point (ppt) increase in anticipated technology and software spending. Even more striking, the proportion of companies anticipating reduced spending has nearly halved, underscoring a growing optimism.

This trend is consistent across companies of all sizes, with widespread adoption fueling AI-driven growth. On a global scale, however, the Asia-Pacific region stands out, leading the charge with the most optimistic outlook.

57% of buyers anticipate their org will spend more on tech and software over the next year.
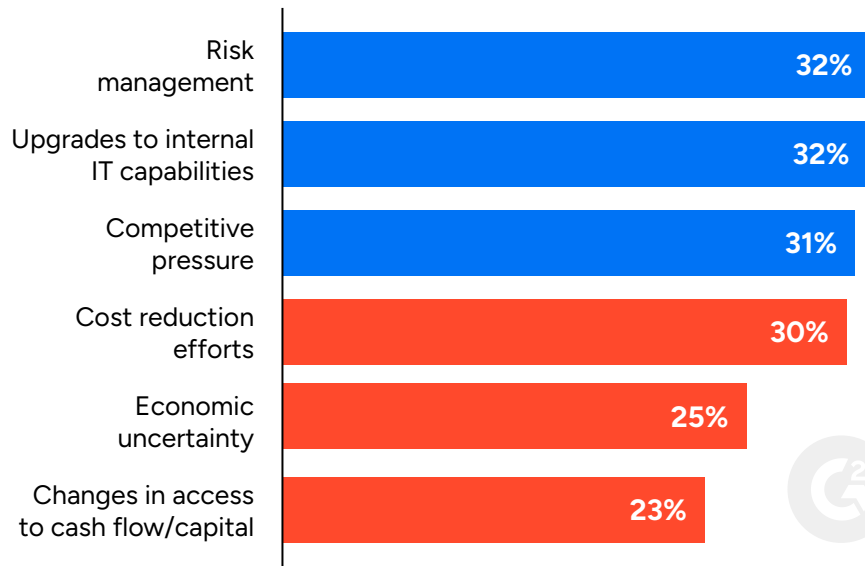
Anticipated software & tech spend change *(next 12mo)*

Legend: 2024 (red), 2025 (blue)

	Increase	Remain the same	Decrease
2024	49%	42%	9%
2025	57%	39%	5%

Percentage of respondents

Economic uncertainty is a top factor influencing spend for 1 of 4 buyers.

Top factors influencing software & tech spend

Factor	Percentage
Risk management	32%
Upgrades to internal IT capabilities	32%
Competitive pressure	31%
Cost reduction efforts	30%
Economic uncertainty	25%
Changes in access to cash flow/capital	23%

Percentage of respondents

While survey respondents in early April 2025 were notably optimistic about their software spending, emerging economic shifts could influence future spending plans. AI continues to be the dominant force driving budget increases, a trend unlikely to fade. However, given recent volatility in economic indicators, the factors contributing to a potential pullback in spending may intensify.

Sellers should closely monitor regional economic forecasts and actively engage in customer conversations to detect early signals of budget tightening and prepare strategic responses accordingly. Importantly, sellers should also strategically focus their efforts on resilient companies, which historically leverage economic downturns as opportunities to invest aggressively and gain competitive advantages.

Deal sizes settle into a new sweet spot.

While enthusiasm for software spend remains strong, driven by the momentum of AI, macroeconomic headwinds and increased scrutiny on return-on-investment (ROI) are reshaping deal sizes. Large, multi-year contracts are facing heightened resistance, giving way to smaller deals or contracts tied directly to performance. CFO interventions and greater procurement oversight play key roles in this shift, bringing a new level of rigor to deal approvals.
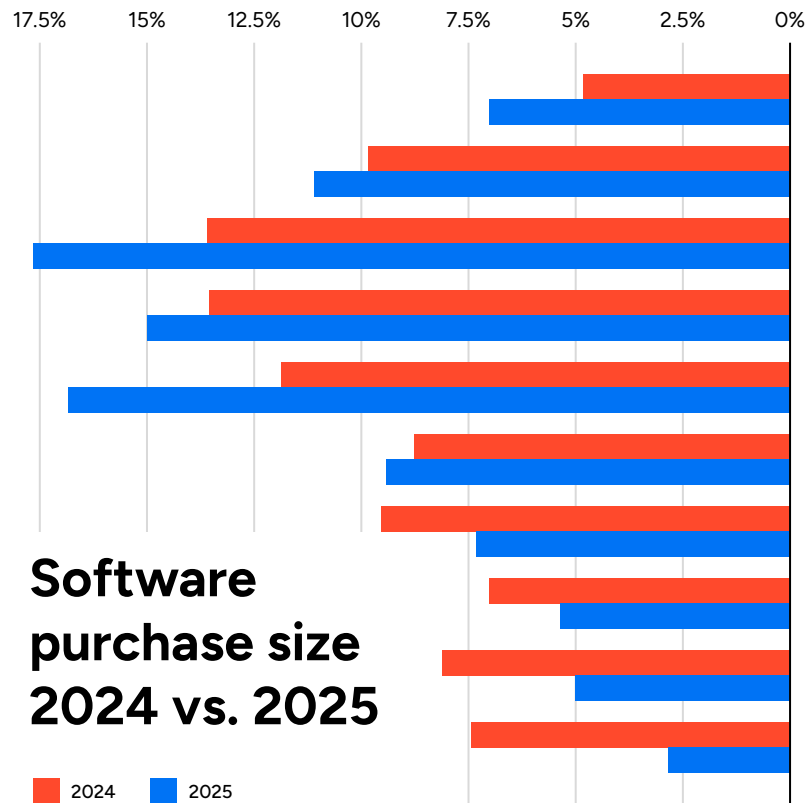
For smaller businesses, the preference for modest deals remains steady, aligned closely with their cash flow management priorities. Mid-market buyers are becoming more conservative, embracing a "do more, but spend less per deal" mindset. Enterprises now cluster their purchases primarily in the $100K–$150K range, a noticeable pullback from the more expansive budgets common during the zero-interest-rate policy (ZIRP) era.

Across all segments, one trend is clear: Multi-year mega-deals are shrinking. Software sellers must swiftly evolve their GTM strategies, aligning closely with this new buyer reality.

Percentage of buyers

Software purchase size 2024 vs. 2025

Deal size	2024	2025
< $1K		
$1K - 9,999		
$10K - 49,999		
$50K - 99,999		
$100K - 149,999		
$150K - 199,999		
$200K - 299,999		
$300K - 499,999		
$500K - 999,999		
$1M - 2M		

Deal size in USD

■ 2024   ■ 2025
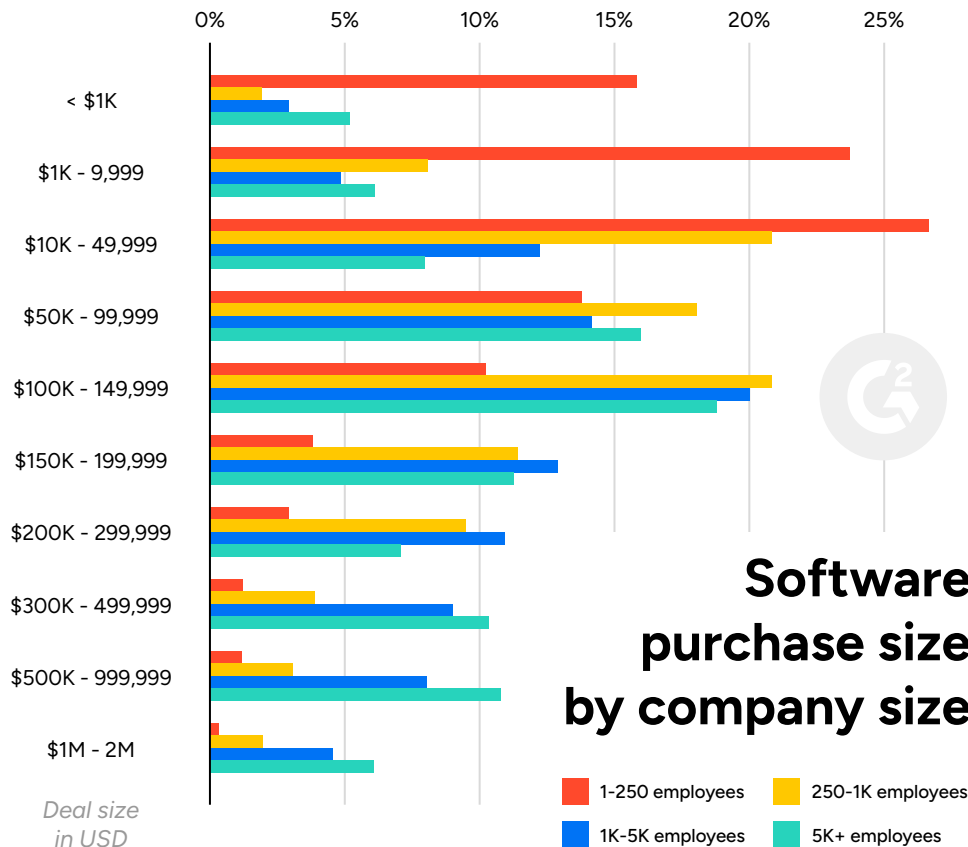
Software purchase size by company size

■ 1-250 employees   ■ 250-1K employees
■ 1K-5K employees   ■ 5K+ employees

New pricing models put the squeeze on deal sizes.

The shift toward usage-based or short-term software offerings is another key driver behind shrinking deal sizes.

Generative and agentic AI are reshaping pricing models, challenging the traditional software-as-a-service (SaaS) paradigm of subscriptions or fixed fees. According to our research, more than one in three buyers now prefer variable pricing models for these solutions. Some pay based on API calls, others are billed by agentic actions, and a growing segment opts to pay strictly for measurable outcomes. This evolution to a pay-as-you-go approach directly contributes to smaller initial deals, prompting sellers to start small and strategically accelerate usage to expand account revenues over time.

Respondents indicate a rising preference for pay-as-you-go models.

Traditional models

Emerging models

Bundled with core product **28%**

Add-on subscription fee **25%**

One-time implementation fee **8%**

Pay-as-you-go
39%

Usage-based **28%**

Outcome-based **10%**

Fixed pricing

Variable pricing
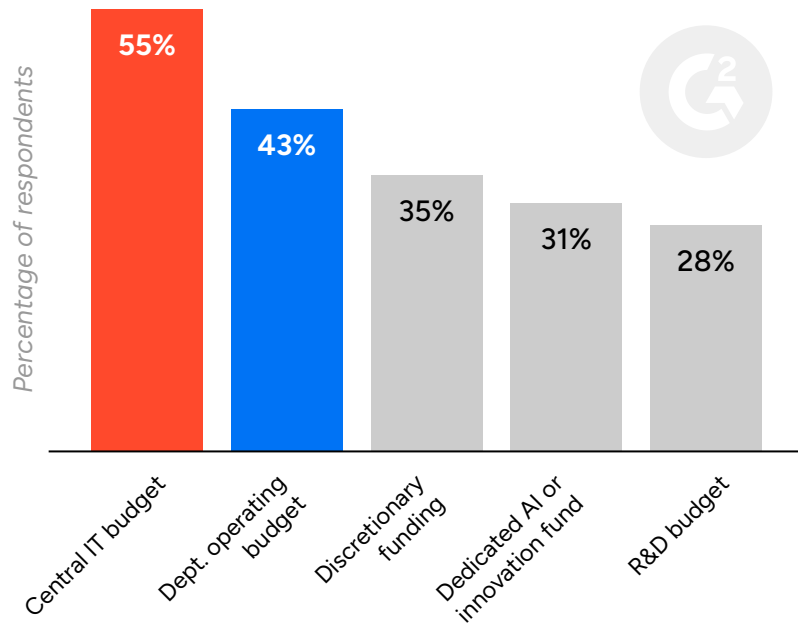
AI is no longer an experiment.

Over the past two years, experts agreed that AI software investments were primarily funded by fragile budgets: research and development (R&D), discretionary spending, or dedicated AI initiatives. CEOs and investors encouraged experimentation, eager to chase proofs of concept driven by a pervasive sense of FOMO amid the rising AI hype.

But in 2025, the landscape has fundamentally shifted. AI is no longer experimental—it's now embedded in how businesses strategically improve their operations.

Our findings reveal that the top sources of AI-powered software funding are now central IT and other departmental operating budgets (such as customer service, marketing, and sales). For enterprises with 1,000–5,000 employees, central IT is identified as a funding source nearly 70% of the time.

More than half of AI solution purchases are funded by central IT budgets.
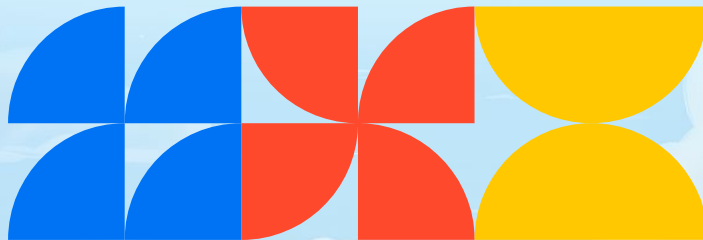
Top funding sources for AI solution purchases

Bar chart — Percentage of respondents:
- Central IT budget: 55%
- Dept. operating budget: 43%
- Discretionary funding: 35%
- Dedicated AI or innovation fund: 31%
- R&D budget: 28%

This shift sends a bullish signal for the future of AI because operational budgets offer far greater stability and predictability. It also reveals a strategic realignment: Operational leaders now have significant influence—if not outright control—over AI investment decisions. Clearly, AI spending is no longer confined to C-suite directives; it's become an operational imperative.

This insight naturally leads us into our report's next section, where we'll explore the evolution of buyer personas shaping today's software market.

Buyer personas: Who's *really* at the table?

We often picture the buyer persona as one ideal target—a single person we focus our efforts on. But in reality, it's far more complex. As you'll soon see, software purchases involve a diverse cast of characters. In this section, we'll unpack the teams influencing software buying decisions and highlight the key players you'll need to win over to succeed.
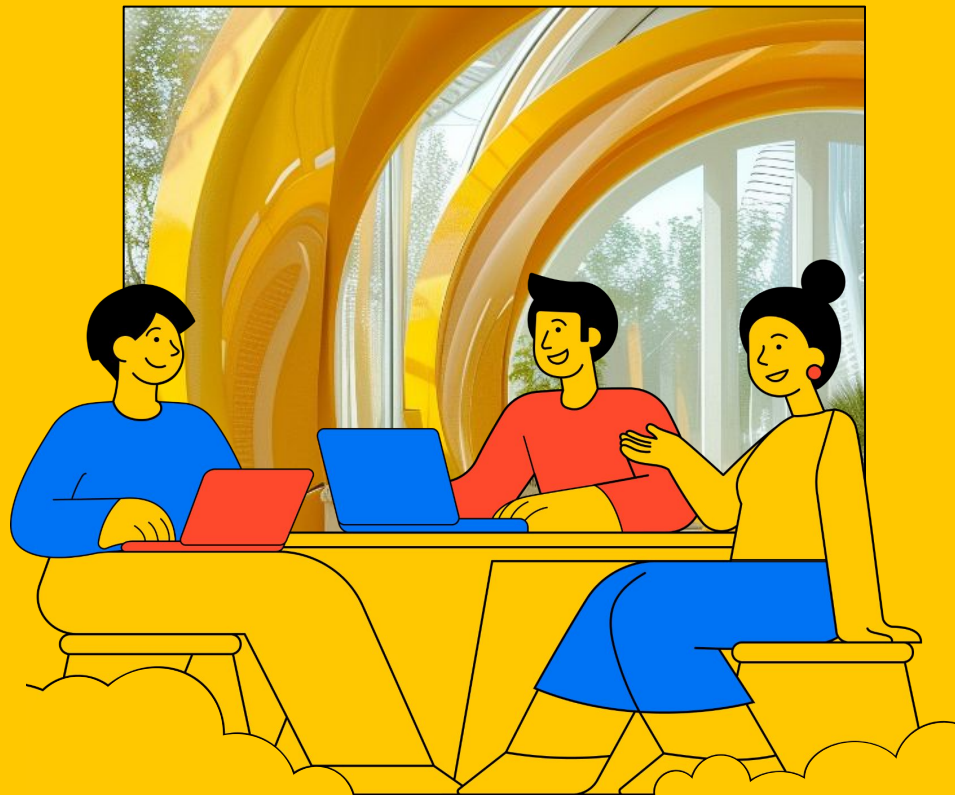
This year, we asked respondents who else typically joins end users and departmental leaders at the buying table. IT involvement was mentioned almost half the time, significantly outpacing InfoSec and executive leadership. Despite many companies adding dedicated roles like heads of AI or CIOs in recent years, these specialists still appear in fewer than 10% of purchase decisions. When segmented by company size, IT's involvement becomes even more pronounced in enterprise and large enterprise organizations.
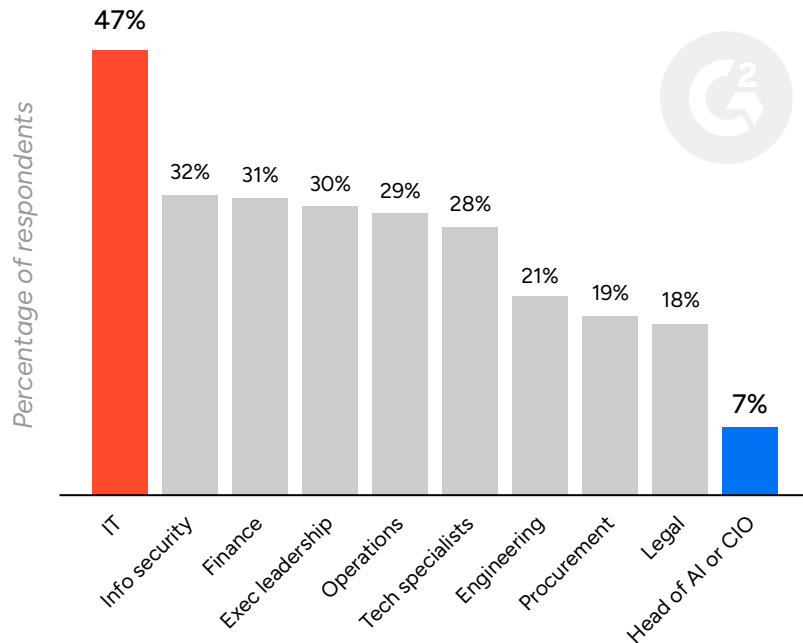
"With evolving AI requirements and the persistent use of unsanctioned tools, a secure AI-by-design infrastructure is non-negotiable. Organizations must achieve complete visibility across their AI ecosystem — including apps, agents, models, and data — and implement proactive security policies with intelligent remediation to ensure trust and responsible AI adoption."

KP Unnikrishnan, *SVP Marketing Americas, Palo Alto Networks*

IT is involved with nearly half of software purchasing decisions.

Teams involved in software purchase decisions


Bar chart — Percentage of respondents:
- IT: 47%
- Info security: 32%
- Finance: 31%
- Exec leadership: 30%
- Operations: 29%
- Tech specialists: 28%
- Engineering: 21%
- Procurement: 19%
- Legal: 18%
- Head of AI or CIO: 7%

In conversations spanning the C-suite to private equity operating partners, we learned that IT's growing influence reflects AI's evolution from novel to pervasive—one stakeholder vividly described it as "The Wild Wild West." Technology leaders are urgently stepping in to coordinate an expanding landscape of AI point solutions, aiming for greater efficiency and tighter integration.

Looking ahead, expect "AI orchestration" to emerge as a major theme, attracting even more technical buyers into the process. Increasingly, these players will seek alignment and interoperability, not just standalone business value.
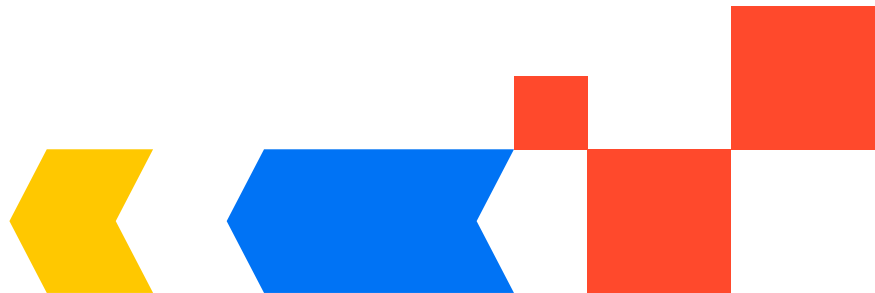
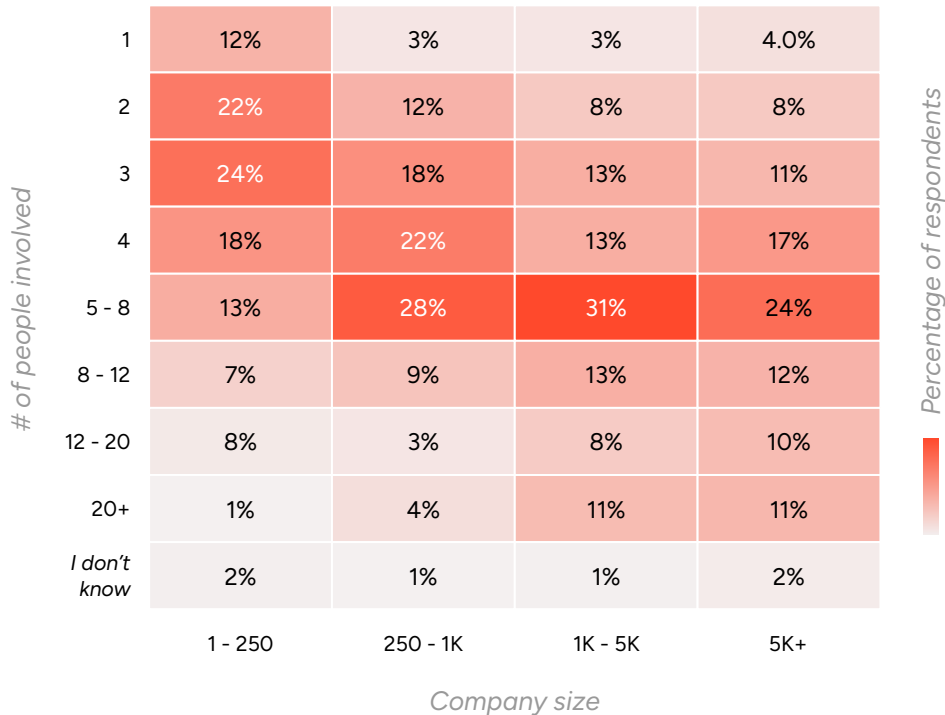# Buying committees are smaller and more focused.

For years, industry analysts observed a steady growth in the size of buying committees. Our data has consistently reinforced this, pinpointing the typical buying group size in the five-to-eight member range. This remains true in 2025, as the heat map clearly illustrates, with one exception: small businesses. They continue to rely on smaller groups of decision makers.
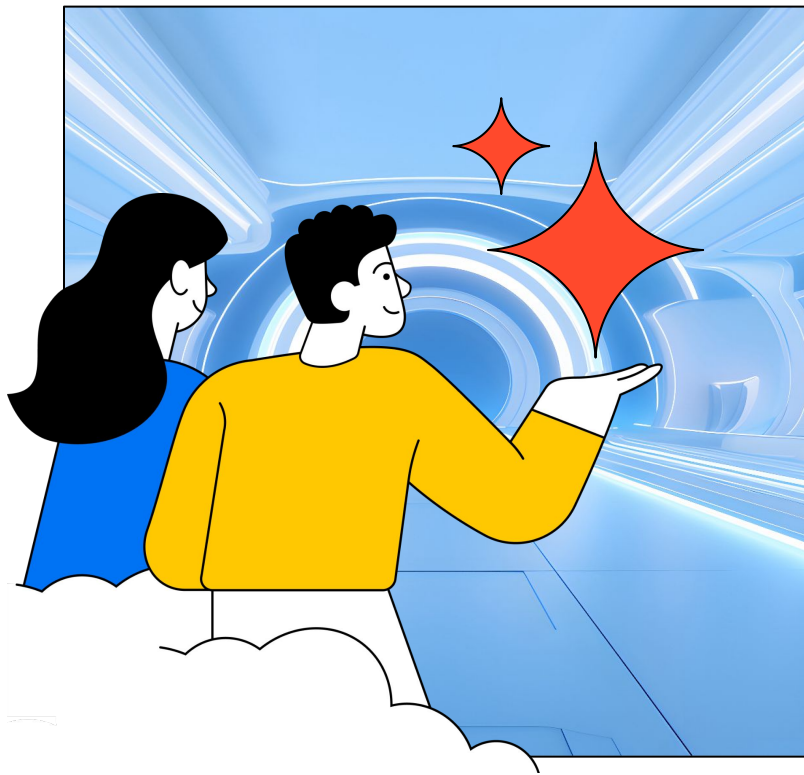
However, something notable happened this past year. Our research shows that the once-dominant five-to-eight member buying committees are shrinking, while smaller groups—quartets and trios—are rising to prominence in software decisions.

Decision teams are shrinking. *(2024 vs. 2025)*

1 person	2 people	3-4	5-8	9-12	13-20
+2% YoY	**+6%** YoY	**+9%** YoY	**-11%** YoY	**-6%** YoY	**-1%** YoY

People involved in software purchase decisions by company size *(2025)*

# of people involved

	1 - 250	250 - 1K	1K - 5K	5K+
1	12%	3%	3%	4.0%
2	22%	12%	8%	8%
3	24%	18%	13%	11%
4	18%	22%	13%	17%
5 - 8	13%	28%	31%	24%
8 - 12	7%	9%	13%	12%
12 - 20	8%	3%	8%	10%
20+	1%	4%	11%	11%
I don't know	2%	1%	1%	2%

Company size

Percentage of respondents

This shift represents a meaningful change for sellers, many of whom have developed sales toolkits and messaging strategies designed to influence sprawling committees they will never be able to "round up and sell to."

Several factors contribute to this new lean-team trend, beginning with the smaller deal sizes highlighted earlier in this report.

But even more compelling is the increasing urgency among buyers to modernize their tech stacks quickly, favoring efficiency over exhaustive consensus-building.

Frequently, champions now work closely with just a handful of colleagues to swiftly evaluate and select the best solution.

This evolution makes internal champions even more critical to a seller's success, as long as those champions can effectively navigate their organization's guardrails to make informed and rapid decisions.
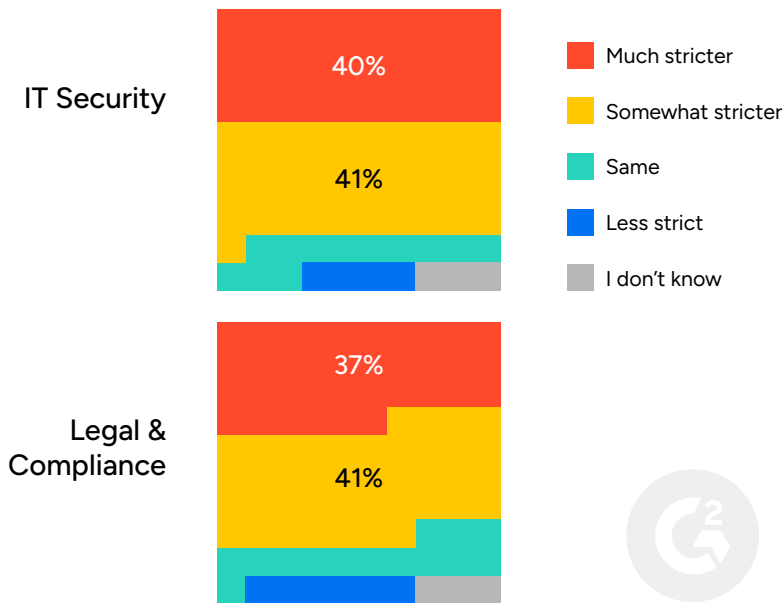
The evolving role of InfoSec and legal

The rise of AI has reshaped the risk landscape for organizations, introducing new cybersecurity threats, data privacy challenges, and potential legal liabilities. Companies have responded by erecting guardrails, built and maintained by information security (InfoSec) and legal teams. This cautious approach is especially warranted with the emergence of agentic AI, which often requires direct access to sensitive internal systems and proprietary data.

Our research indicates that nearly three out of four companies now impose stricter requirements when evaluating AI-powered software compared to non-AI solutions. Small businesses are typically less stringent, while enterprises (1,000–5,000 employees) set the highest standards for AI software procurement.

IT security and legal are getting stricter in 2025.

AI software evaluation —Req. strictness *(2025)*

IT Security
- Much stricter: 40%
- Somewhat stricter: 41%

Legal & Compliance
- Much stricter: 37%
- Somewhat stricter: 41%

Legend:
- Much stricter
- Somewhat stricter
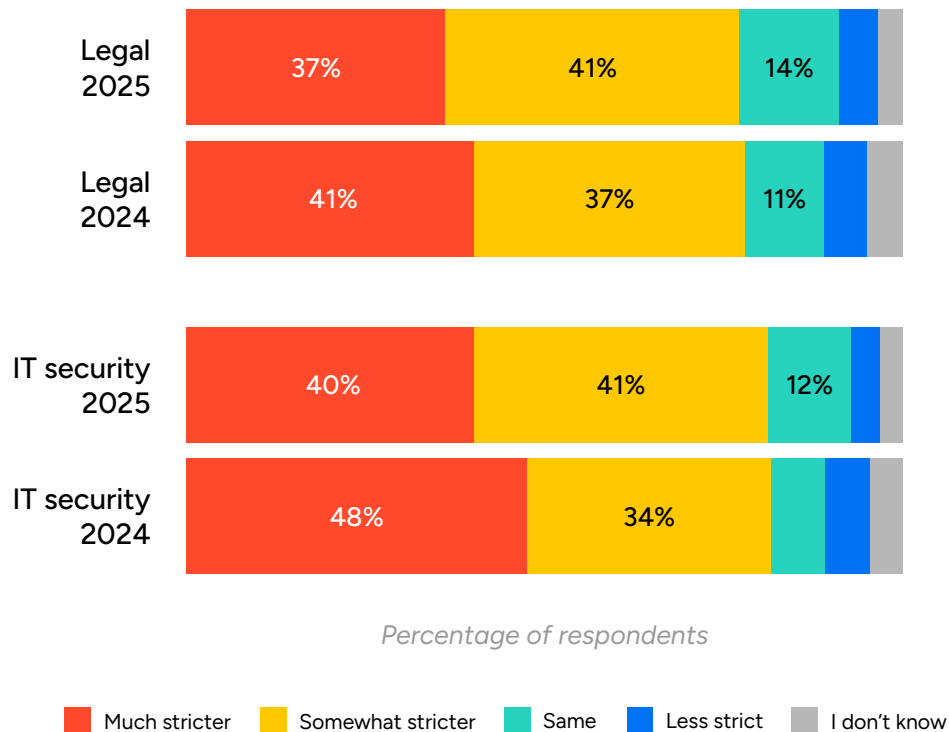- Same
- Less strict
- I don't know

Despite these stringent requirements, the year-over-year data tells a different story. The proportion of buyers labeling their approach as "much stricter" has shifted notably toward "somewhat stricter," reflecting a growing confidence and maturity in managing AI-related risks. In fact, a small but meaningful percentage of respondents report easing their AI requirements in 2025.

Even with this maturing environment, sellers should keep a close eye on InfoSec and legal during the buying process. These teams still hold significant power to slow or halt deals, regardless of projected business benefits.

How AI changes requirements: 2024 vs. 2025.

	Much stricter	Somewhat stricter	Same	Less strict	I don't know
Legal 2025	37%	41%	14%		
Legal 2024	41%	37%	11%		
IT security 2025	40%	41%	12%		
IT security 2024	48%	34%			

Percentage of respondents

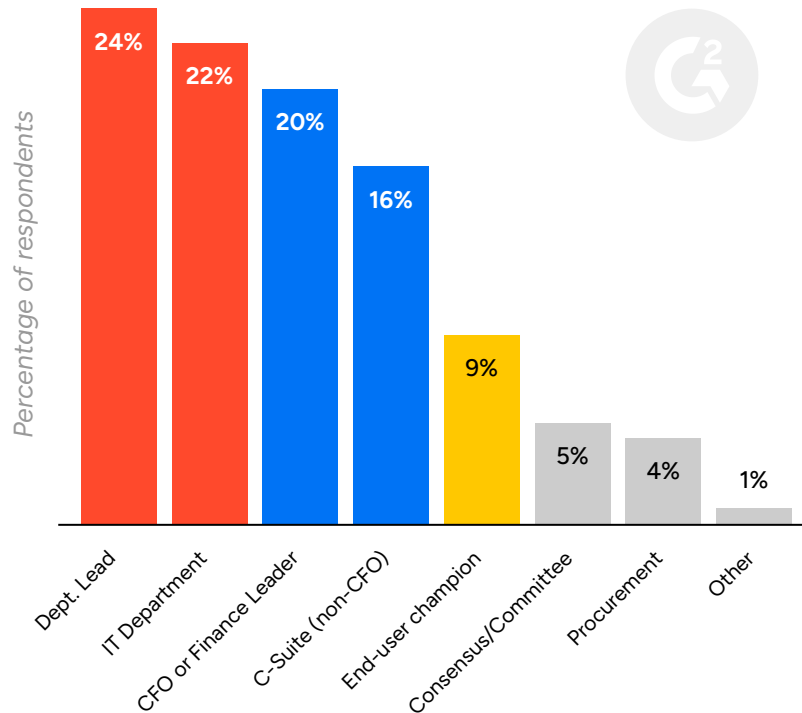■ Much stricter   ■ Somewhat stricter   ■ Same   ■ Less strict   ■ I don't know

Who's making the final call in 2025?

Now we arrive at the ultimate question: Whose decision matters most? Last year, we reported that the C-suite—especially CFOs—held ultimate decision-making power in 42% of software purchases. This year's data still places them in a position of significant influence, but slightly less dominant than before.

This subtle shift makes sense for two reasons: First, CEOs were at the forefront of last year's aggressive push into AI software, frequently directing budgets toward experimentation. But this year, the funding responsibility is moving steadily toward operational budgets. Second, CFOs traditionally held sway due to the size of software deals. With deal sizes shrinking, their involvement naturally scales back.

IT's role, meanwhile, remains consistently influential and is likely to grow even stronger. Technology leaders increasingly seek alignment across AI solutions to maintain coherent standards and consistent data practices.

Who is the ultimate software purchase decision maker?

Percentage of respondents

Category	Value
Dept. Lead	24%
IT Department	22%
CFO or Finance Leader	20%
C-Suite (non-CFO)	16%
End-user champion	9%
Consensus/Committee	5%
Procurement	4%
Other	1%

Department lead & end-user champion rise in purchase decision prominence.

Who ultimately makes software purchase decisions? *(YoY 2024 vs. 2025)*
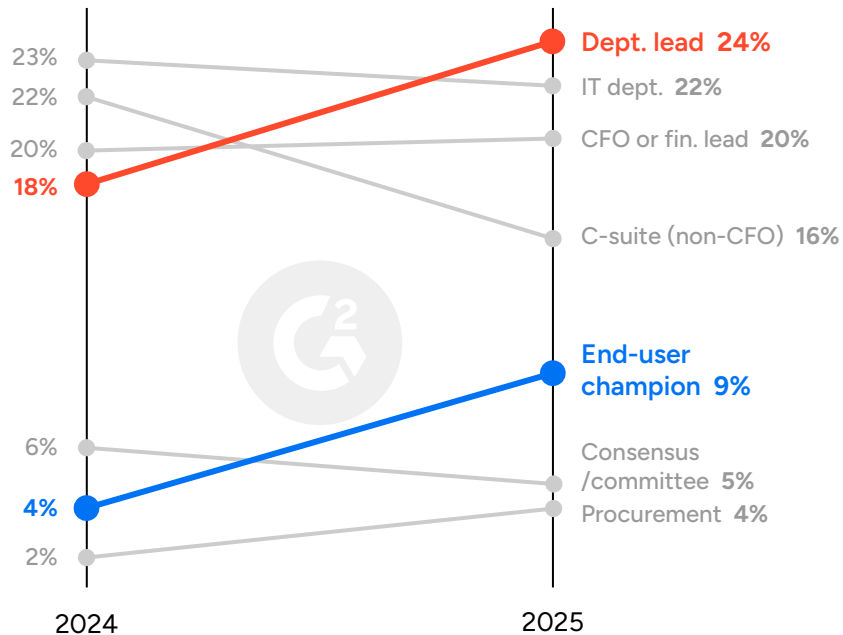
But the most notable shift year-over-year is the rising decision-making power of departmental leaders and end-user champions. Their influence surge is significant and closely tied to the trend toward smaller, less risky deals and flexible pay-as-you-go contracts.

The trend is particularly pronounced among smaller businesses, where department heads now drive final decisions nearly as often as their senior leadership.

This shift matters greatly, especially when you consider who initiates and leads the buying journey, from initial research to creating shortlists and ultimately choosing software solutions.

Note: 'Legal' (4.2% in 2024) was not offered as an answer in 2025. Adjusting 2024 to remove legal still shows department lead + 4.3 ppt, end user champion + 4.6 ppt adjusted.

A more direct buyer's journey is emerging.

Over the last few years, we've observed growing disruption at every stage of the buyer's journey—from research to evaluation to decision—as large language models (LLMs) influence how software solutions are discovered. Much like the internet profoundly reshaped this journey at the turn of the 21st century, AI search is making a significant impact today.

As we reviewed the data, the words of sci-fi writer William Gibson came immediately to mind: "The future is here. It's just unevenly distributed."

For several years, buyers have consistently identified research as the longest step in their journey. Traditional search engines often overwhelmed them with endless blue links, leading to click-optimized content and vendor sales messaging that created more noise than clarity.

But this year, a significant number of buyers have broken that cycle. To lighten their cognitive load, they're increasingly turning to innovations like AI search. Our 2025 survey data tells a compelling story, direct from the buyer.

By a small margin, Google remains the most popular source for software buyers at small businesses and mid-market firms. But for enterprise and large enterprise firms, software review websites and AI search have leapfrogged Google in a stunning development.

79% AI search has changed how I conduct research.

30% I'm more productive with AI search than traditional search.
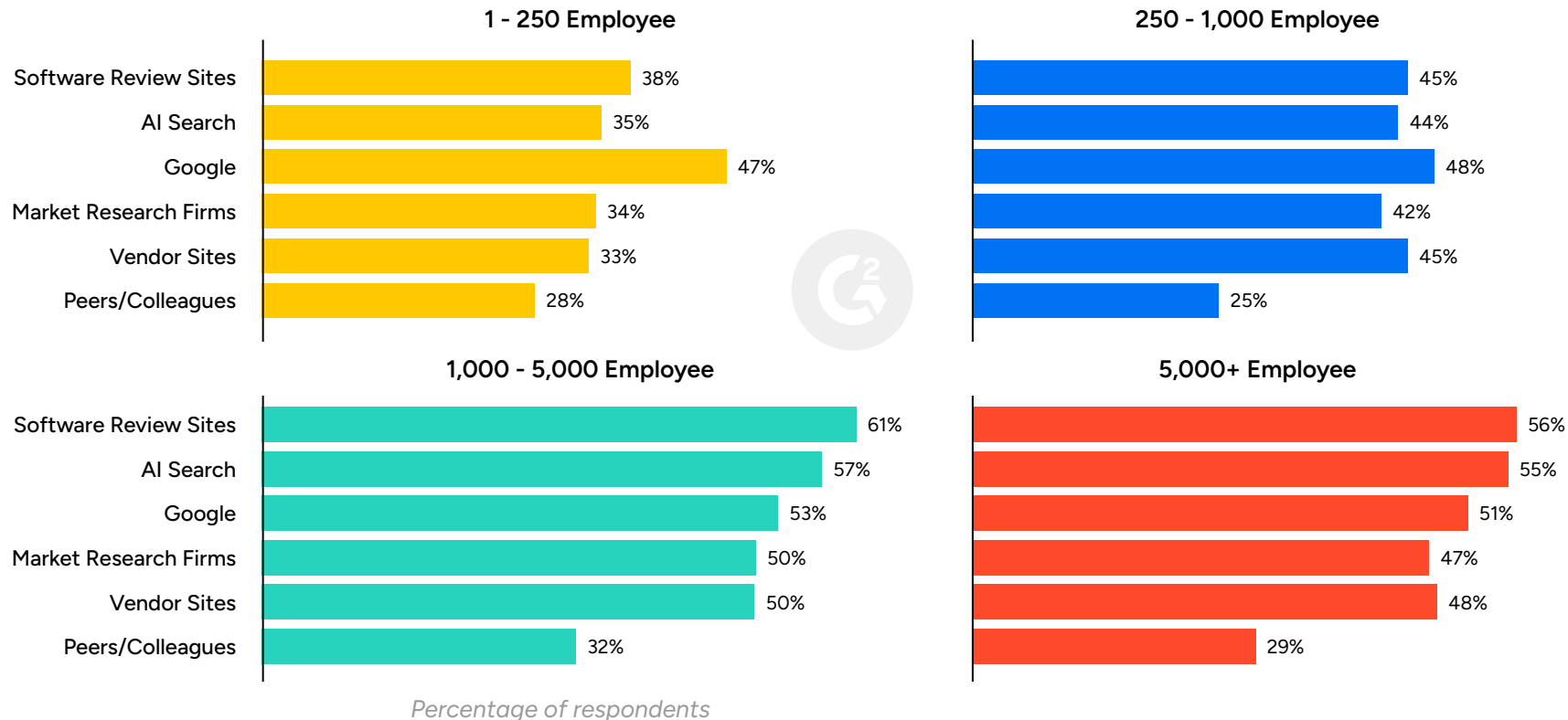
29% I start research with AI search more often than Google.

Source: G2 April 2025 Survey

Research sources vary by company size.

1 - 250 Employee

Source	Percentage
Software Review Sites	38%
AI Search	35%
Google	47%
Market Research Firms	34%
Vendor Sites	33%
Peers/Colleagues	28%

250 - 1,000 Employee

Source	Percentage
Software Review Sites	45%
AI Search	44%
Google	48%
Market Research Firms	42%
Vendor Sites	45%
Peers/Colleagues	25%

1,000 - 5,000 Employee

Source	Percentage
Software Review Sites	61%
AI Search	57%
Google	53%
Market Research Firms	50%
Vendor Sites	50%
Peers/Colleagues	32%

5,000+ Employee

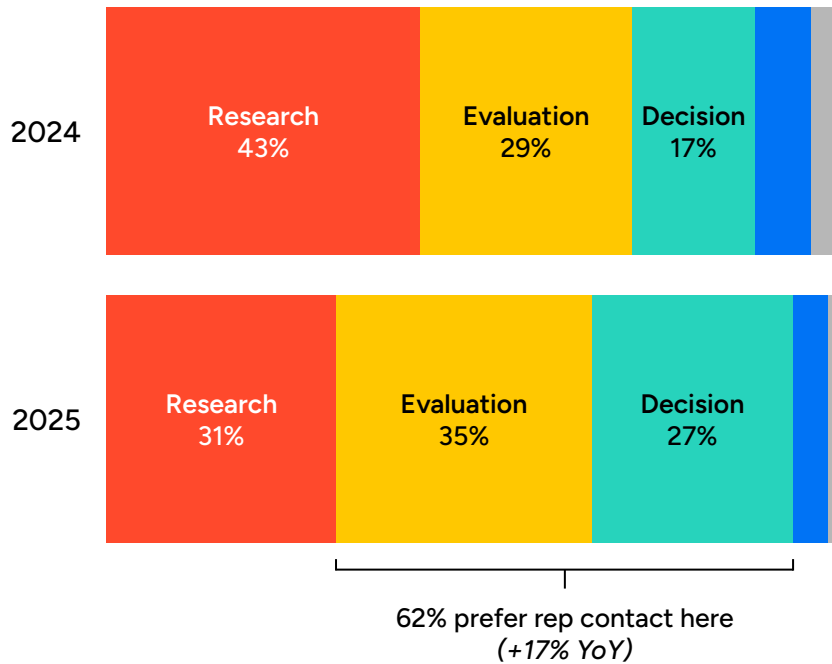| Source	Percentage
Software Review Sites	56%
AI Search	55%
Google	51%
Market Research Firms	47%
Vendor Sites	48%
Peers/Colleagues	29%

Percentage of respondents

Larger companies have increased workloads on employees with headcount reductions and a focus on profitability. Grappling with burnout, buyers at these firms are turning to software reviews and AI answer engines to save valuable time, freeing themselves to focus on strategic priorities. They value the peer insights they get from reviews and the immediate payoff from AI search, which is increasingly being offered to them by their employers.

Across the board, buyers are becoming more efficient researchers. Nearly two out of three now prefer engaging with vendor salespeople only in the later stages of their buying journey, up sharply (+17 ppt) from last year. This puts pressure on software marketers to ensure their products are discoverable and highly recommended, showing up in exactly the right places at precisely the right time.

Buyers prefer sales contact later in the journey.

2024

| Research 43% | Evaluation 29% | Decision 17% | | |

2025

| Research 31% | Evaluation 35% | Decision 27% | | |

62% prefer rep contact here
(+17% YoY)

2024 results re-weighted to remove "Discovery". If all Discovery answers are instead added to Research, Evaluation + Decisions still rise > 25% YoY.
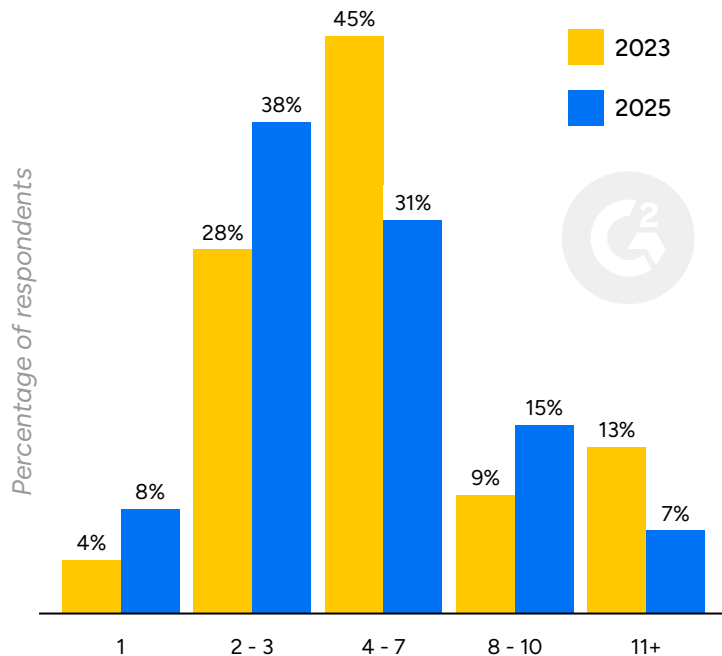
The evaluation stage becomes more efficient.

In the middle of the buyer's journey, vendor options are evaluated and distilled down to a manageable shortlist. For software sellers, securing a spot on this shortlist has become make-or-break.

Last year, we reported a clear trend toward shrinking shortlists, which continues into this year. Our multi-year data indicates a new reality for sellers: Reaching buyers before competitors can offer a substantial advantage, especially as shortlists have become tighter. Today's buyers prefer narrowing their options to just two or three vendors. However, keep an eye on the "no shortlist" approach—this practice has doubled in frequency over recent years, suggesting an even more decisive, streamlined evaluation process.

Why are buyers moving quickly from numerous options to a more focused final assessment? G2 Data reveals that leads generated through AI search tools exhibit a notably higher conversion rate compared to traditional research methods. This difference arises because buyers, leveraging AI-driven tools, complete a significant portion of their product-fit analysis before they ever visit a vendor's website or speak to a sales representative.

Shortlists continue to shrink.

Shortlist size trend *(2023 vs. 2025)*

Bar chart: Percentage of respondents by shortlist size.

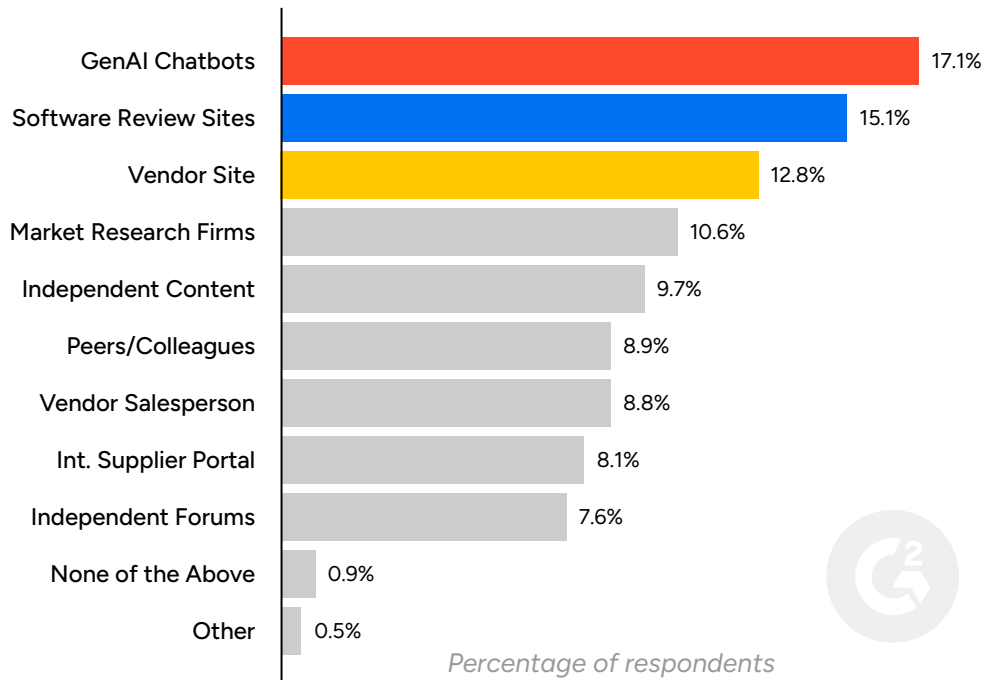| Shortlist size	2023	2025
1	4%	8%
2 - 3	28%	38%
4 - 7	45%	31%
8 - 10	9%	15%
11+	13%	7%

What sources influence the making of the shortlist?

Although internal collaboration within buying teams remains crucial, external information heavily influences the short-listing process. This year, our survey asked software buyers which external sources shaped their evaluations, and AI search emerged prominently once again.

Software review websites closely followed AI search, remaining a trusted resource for buyer-generated insights that help teams confidently narrow down choices. In a surprising twist, generative AI chatbots were cited as being twice as influential as both salespeople and independent forums like Reddit.

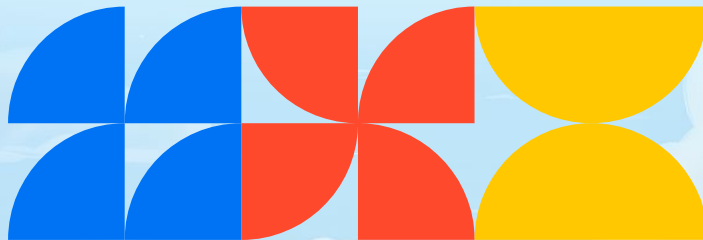## GenAI chatbots and software review sites are top sources influencing shortlists.

Sources that influence vendor shortlisting

Source	Percentage
GenAI Chatbots	17.1%
Software Review Sites	15.1%
Vendor Site	12.8%
Market Research Firms	10.6%
Independent Content	9.7%
Peers/Colleagues	8.9%
Vendor Salesperson	8.8%
Int. Supplier Portal	8.1%
Independent Forums	7.6%
None of the Above	0.9%
Other	0.5%

Percentage of respondents

This shift may be explained by consumer behavior spilling over into business decision-making. Buyers have become accustomed to receiving concise, personalized recommendations in their personal lives, prompting queries like "Give me three drones under $500" or "Suggest the top three steak houses in Chicago." Now, that same "one-shot" approach is reshaping business evaluation. Software buyers are increasingly relying on generative AI to instantly produce highly tailored shortlists.

This evolution highlights buyers' desire to streamline their workflows, taking the most direct approach possible. It sets the stage for the final stage of their journey—making a decision. For one in four buyers, this remains the longest and most challenging step.
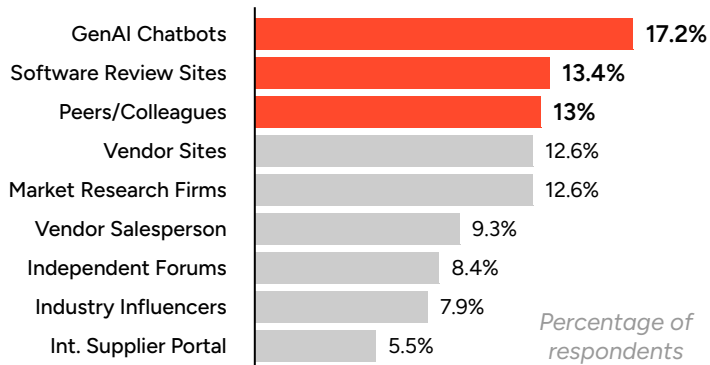
When it's decision time, which sources do buyers trust most?

Regardless of purchase size or contract duration, making the final decision is difficult for software buyers. There's a real opportunity cost to picking the wrong solution, which is why buyers look for trusted sources of information to gain the confidence they need to move forward.
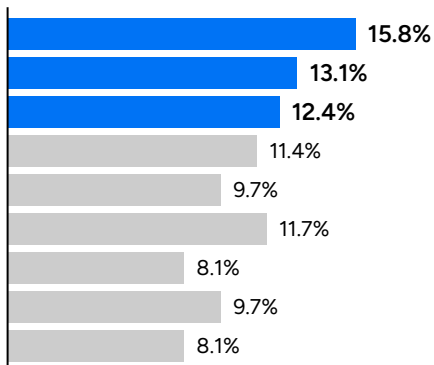
Historically, peers and industry analysts have dominated this stage, offering strong recommendations to sway uncertain buyers. Recently, however, a powerful new influencer has entered the mix: generative AI.

Regional data shows generative AI and software review websites as top trusted resources at decision time. Software review sites highlight genuine user sentiment, delivering peer insights from diverse, relevant organizations. This explains why, over recent years, they've surpassed vendor websites and analyst firms as trusted sources everywhere except APAC.
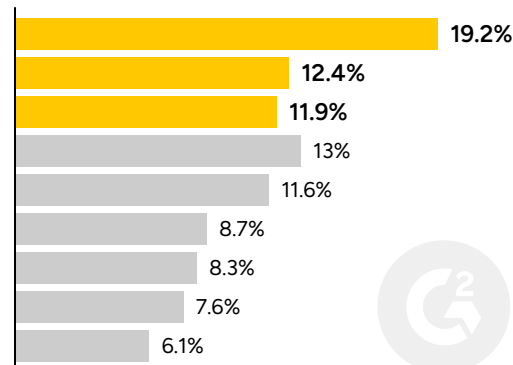
Top trusted sources - N. America

Source	Percentage
GenAI Chatbots	17.2%
Software Review Sites	13.4%
Peers/Colleagues	13%
Vendor Sites	12.6%
Market Research Firms	12.6%
Vendor Salesperson	9.3%
Independent Forums	8.4%
Industry Influencers	7.9%
Int. Supplier Portal	5.5%

Percentage of respondents

EMEA

Source	Percentage
GenAI Chatbots	15.8%
Software Review Sites	13.1%
Peers/Colleagues	12.4%
Vendor Sites	11.4%
Market Research Firms	9.7%
Vendor Salesperson	11.7%
Independent Forums	8.1%
Industry Influencers	9.7%
Int. Supplier Portal	8.1%

APAC

| Source	Percentage
GenAI Chatbots	19.2%
Software Review Sites	12.4%
Peers/Colleagues	11.9%
Vendor Sites	13%
Market Research Firms	11.6%
Vendor Salesperson	8.7%
Independent Forums	8.3%
Industry Influencers	7.6%
Int. Supplier Portal	6.1%

Trust in generative AI has grown significantly, thanks to enhancements like verification links in chatbot responses and buyers providing clearer context to minimize errors. This has elevated generative AI from a research assistant into a trusted advisor, directly shaping final decisions.

For buyers navigating complex evaluations, generative AI simplifies the process by synthesizing extensive information into a clear recommendation, streamlining their path to a confident decision.

Trust at this stage is increasingly defined by clarity rather than mere familiarity. For sellers, this vividly illustrates the new buyer's journey—one in which AI plays a decisive role at every stage.
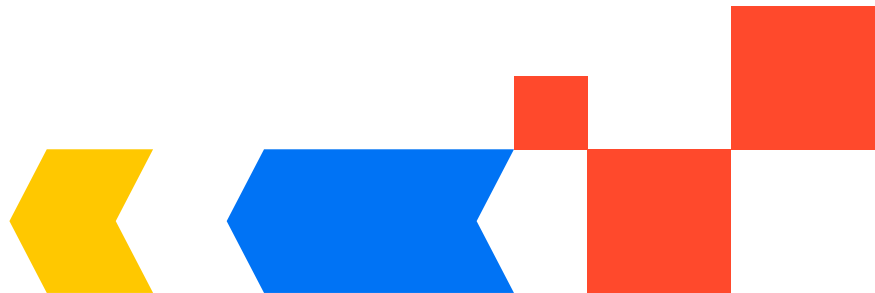
Buyers are increasingly valuing AI.

AI functionality in software has moved from "shiny new" to "got to have it" over the past year, according to our research. Four out of five buyers reported positive returns on their AI-powered software investments—a sentiment strongly echoed in G2 review data. In fact, one in three users say AI has exceeded their expectations, signaling rising enthusiasm rather than disillusionment.

How ROI for AI features met expectations

Exceeded 32.5%	Met 38.2%	Fell short 7.8%	Not sure 21.5%

Source: G2 Data, March 2025

For sellers, it's critical to look ahead to understand how AI functionality will directly influence new business opportunities. The following research suggests that buyers increasingly base their software selections on whether products include the latest AI capabilities.

Buyers are saying, "I expect AI functionality."

Over two out of three respondents now actively consider AI capabilities when selecting software, making it an essential ingredient in most software investments.

Our survey revealed that for self-identified power users (36% of respondents), AI functionality is a must-have in any software purchase. It's no longer optional—it's table stakes to even make their shortlist.

For software vendors, this raises expectations significantly, requiring constant product enhancements to remain competitive.

AI is a must-have differentiator in software buying decisions.

56.2%   Power users
(rely on AI daily)

19.9%   Adopters
(regular users)

10.5%   Infrequent users
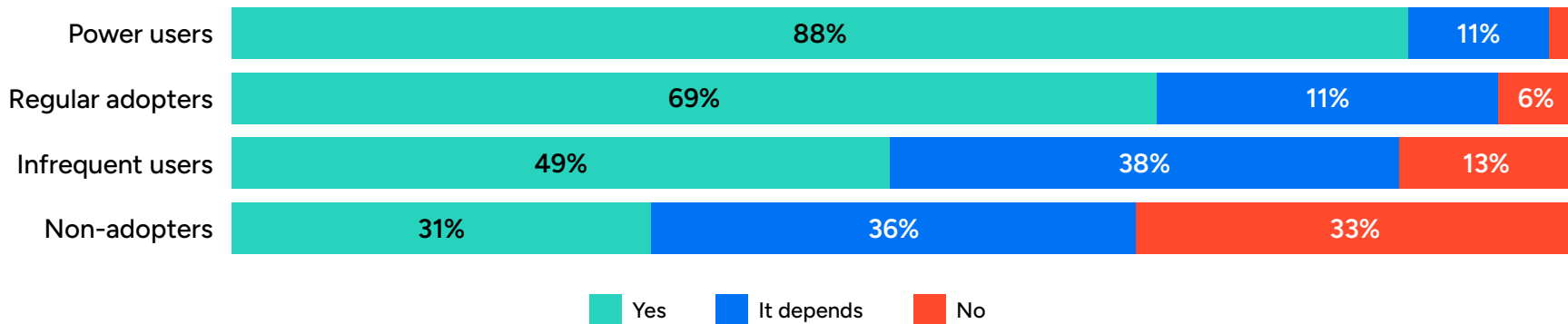*(occasional)*

6.8%   Non-adopters
(don't use AI)

Show me the money!

As more buyers expect AI, a crucial question emerges: Are they willing to pay for it? After all, if buyers demand AI but won't pay extra, software providers will simply incur higher costs without corresponding revenue, turning AI into a drag on profitability.

Over two-thirds of respondents indicated they'd pay a premium for AI functionality—but only if vendors clearly demonstrate its value or productivity gains. Among power users, a rapidly growing segment of software buyers, this willingness jumps dramatically to nearly 9 out of 10, signaling strong demand that vendors can tap into.
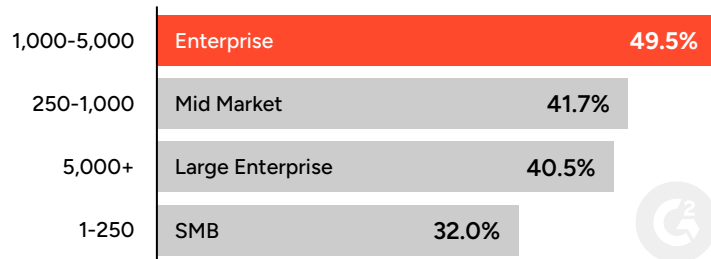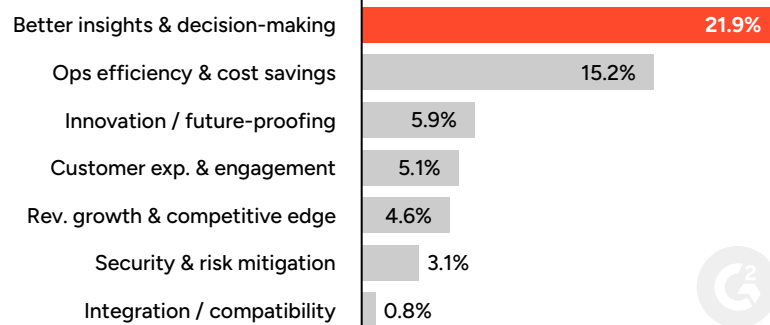
88% of power users are willing to pay an AI premium.

Category	Yes	It depends	No
Power users	88%	11%	
Regular adopters	69%	11%	6%
Infrequent users	49%	38%	13%
Non-adopters	31%	36%	33%

Legend: ■ Yes ■ It depends ■ No

Half of enterprise buyers switched to software with better AI.

1,000-5,000	Enterprise — **49.5%**
250-1,000	Mid Market — **41.7%**
5,000+	Large Enterprise — **40.5%**
1-250	SMB — **32.0%**

Ultimately, actions speak louder than words, and buyers' recent decisions reveal the true value they place on AI. Our survey shows that a significant number of buyers switched software providers over the past year, specifically to gain access to superior AI features, with nearly half of enterprise buyers leading this charge.

These buyers aren't merely chasing the latest buzz—they're driven by tangible benefits such as improved decision-making and operational efficiencies. Clearly, adopting AI is now integral to conducting business effectively, rather than merely "keeping up with the latest trends."

Why buyers switched vendors for AI functionality.

|	
Better insights & decision-making	**21.9%**
Ops efficiency & cost savings	15.2%
Innovation / future-proofing	5.9%
Customer exp. & engagement	5.1%
Rev. growth & competitive edge	4.6%
Security & risk mitigation	3.1%
Integration / compatibility	0.8%

AI is reshaping the operational foundations of firms, erasing deep seated limits that have constrained from growth and impact for hundreds of years.

As AI continues to become more reliable and autonomous, buyers will soon expect it to be a standard part of every software solution. They are realizing that AI is a breakthrough technology that solves the dilemma, "Faster, better, cheaper. Pick any two."

This reality should reshape your GTM approach and challenge you to join your buyers in rapidly embracing the age of AI.
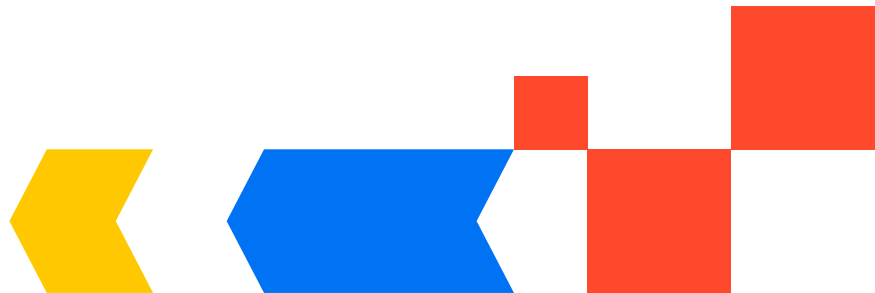
Recommended actions to take for AI success.

Adaptability is key to SaaS GTM success. Buyer behaviors shift quickly—your strategies should, too. These recommendations, based on extensive qualitative research, offer practical advice you can put into action right away.
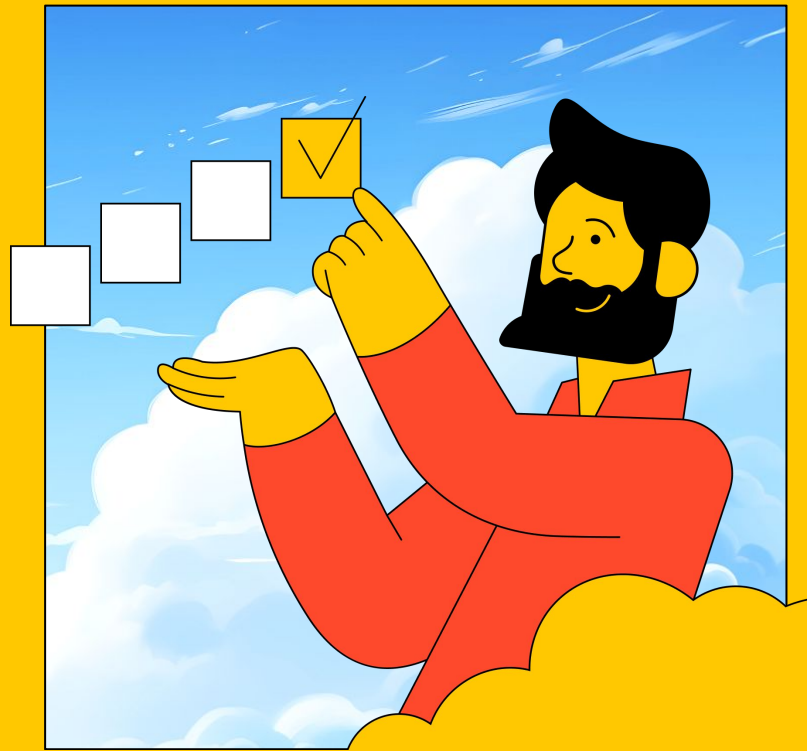
Win the LLM-first discovery moment.

It's clear that a significant number of software buyers begin their research journey by interacting with an LLM instead of Google. To be in the running, you need to show up in the new world of AI search.

The good news is that, according To G2 Data, the conversion rate for AI search-driven leads is 40% better than those that come from traditional search.

Take these actions right away.

Allow LLMs to crawl your site content. You might not know it, but your sites could be disallowing crawlers through your indexation directives, CDN settings, or general bot protection platforms, which limit your exposure to AI searchers. Here are common blockers you can address:

Layer	Snippet to look for	What it tells crawlers	What it tells crawlers
robots.txt – general	User-agent: * Disallow: /	Blocks ALL bots (ChatGPT, Gemini, etc.)	Kills AI & SEO visibility
robots.txt	User-agent: GPTBot Disallow: /	Blocks only OpenAI's GPTBot	Hides you from ChatGPT answers
robots.txt	User-agent: Google-Extended Disallow: /api/	Blocks Google's gen-AI crawler	Docs/pricing won't surface in Gemini
Meta-robots tag	<meta name="robots" content="noindex,nofollow">	Page invisible to all crawlers	Leaves valuable pages unindexed
Meta-robots tag	<meta name="robots" content="noai">	Don't train/show this content	CMS templates flipped on by default
HTTP header	X-Robots-Tag: noai, noindex	Server-level block similar to meta tag	Easy to miss on PDFs/assets
Canonical misfire	<link rel="canonical" href="https://oldsite.com/2019/paper.html">	Points to stale master URL	LLMs surface outdated data
Dynamic JS content	<meta name="robots" content="noindex,nofollow">	Crawler sees an empty page	LLMs miss key dynamics info
Login/paywall redirect	<meta name="robots" content="noindex,nofollow">	Crawler hits blank/paywalled page	Walls off docs meant for discovery

Take these actions right away.

Employ generative engine optimization (GEO) of your content. This is a very different discipline from search engine optimization (SEO), because LLMs seek to provide an answer as opposed to a set of links. You need to convert product documents, release notes, and FAQs into chunked, schema-rich feeds optimized for chatbots and copilots. A key step is understanding who your unique AI competitors are, and which content they have had success with.
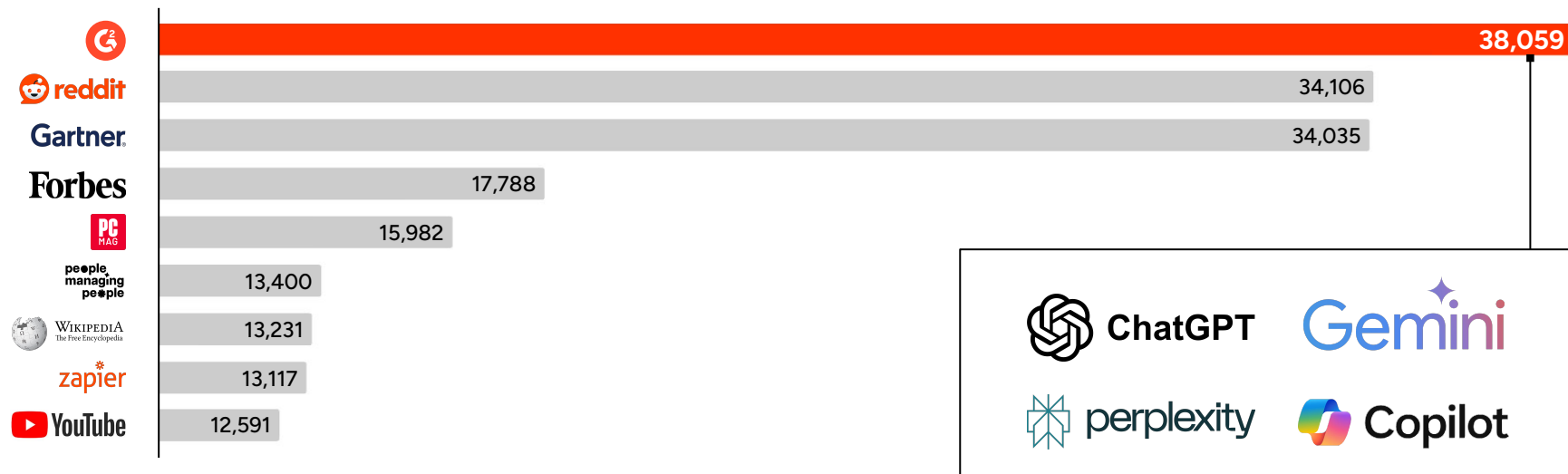
Monitor your brand's presence in LLMs via third-party platforms or by developing a robust prompt library for testing via an API. Visit G2's GEO category page for vendor options for optimization and monitoring services.

Take these actions right away.

Invest in presence across software review websites like G2. Recent reviews from peers have weight in LLMs looking for answers. Brand mentions on category pages and comparison pages contribute to showing up in AI search. G2 outperforms Reddit, analyst firms, and others in terms of mentions as measured by LLM performance measurement site, Profound.

G2	38,059
reddit	34,106
Gartner	34,035
Forbes	17,788
PC MAG	15,982
people managing people	13,400
WIKIPEDIA The Free Encyclopedia	13,231
zapier	13,117
YouTube	12,591

ChatGPT   Gemini   perplexity   Copilot

Personalize messaging by role and segment.

Our research highlights evolving buyer personas, such as IT leaders orchestrating AI solutions. In addition to these persons, it's important to recognize how buying behaviors vary by company size and AI proficiency (e.g., power users). Generic messaging won't resonate. Your GTM strategies must meet buyers where they are.

90-day action plan

Develop role-specific sales decks and marketing assets: IT (risk and integration), department leads (business outcomes), and power users (workflow depth and AI expertise).
Create segmented microsites: Enterprise (integration/governance), mid-market (scalability/efficiency), SMB (speed-to-value/affordability).
Equip sales development reps (SDRs) to engage technical buyers effectively and route leads by persona and segment: Managers should monitor recorded calls or transcripts for personalization insights.

Buyer Behavior Report 2025

Spend

Personas

Journey

AI
Value

Recommendations

Lead with AI ROI, not features.

Buyers increasingly value AI functionality and are willing to pay more, provided the value is clear. Their future spend on software is contingent on anticipated ROI. Focus less on technology itself and more on the tangible benefits your AI delivers.

Tactics to emphasize value

Use generative AI's research capabilities to understand customer-specific ROI expectations and analyze factors like company size, industry, and historical spend.
Implement ROI calculators or matrices on your site, chatbots, and sales presentations. Integrate ROI reporting prominently in quarterly business reviews (QBRs).
Publish targeted "90-day time-to-value" case studies segmented by industry, vertical, or company size.
Provide sales teams with data-driven presentations linking AI features to measurable productivity gains, cost savings, or velocity in business outcomes.

Land small and expand with variable pricing.

The shift toward smaller deals and variable pricing models necessitates rethinking customer entry strategies. Expect more buyers to favor consumption-based pricing.

Adjusting to the new pricing landscape

Offer low-commitment usage tiers that scale automatically with increased use. Conduct A/B tests to optimize segments that boost growth without substantial short-term ARR impacts.
Integrate in-product signals (usage, feature adoption, solutions documented) to activate expansion strategies. Be prepared to transition to variable pricing when customer-product fit indicates growth potential or churn risk.
Align sales compensation with net-revenue retention instead of initial ACV. Form dedicated value-creation teams focused on customer-driven product improvements, training, and integrations to encourage increased consumption and outcomes.

Empower internal champions and streamline security clearance.

Buying committees have narrowed, enhancing the influence of internal champions and departmental managers. Simultaneously, AI's access to sensitive data has tightened security requirements. Equip your stakeholders with effective tools to champion your offerings internally.

Resources for champions and gatekeepers

| |
|---|
| Provide tailored champion toolkits featuring thought leadership and objection-handling resources for IT and finance concerns. Collaborate on personalized ROI one-sheets for enterprise accounts aligned to their key financial objectives (budget efficiencies, revenue growth, market expansion). |
| Offer easily accessible security documentation (DPAs, SOC 2 reports, model lineage) on product pages and chatbot interfaces (company-managed and LLMs). |
| Host quarterly virtual peer roundtables. Conduct IT-focused webinars highlighting integration updates, risk management strategies, and relevant customer experiences. |

Before you go...

Think of this Buyer Behavior Report as a buffet—offering a wide range of insights you can selectively sample to shape your GTM strategy. You don't need to take everything; just pick what resonates most and act on it.

We've intentionally shared only a portion of our findings to keep this report concise and actionable.

If you have feedback or would like to explore additional insights from G2's extensive data or our survey results, please reach out to us at BBR25@g2.com.
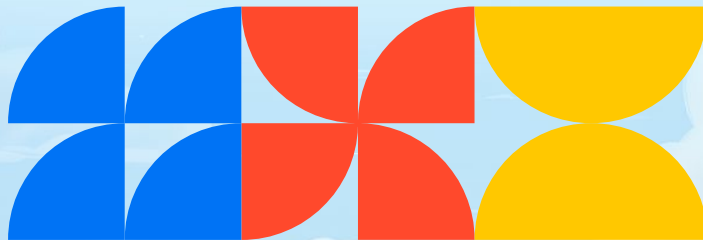
Methodology

G2 fielded an online survey among 1,169 B2B decision makers with responsibility for, or influence over, purchase decisions for departments, multiple departments, operating units, or entire businesses. Respondents had job titles ranging from individual contributor to manager, director, VP, or higher. To maximize differentiation for sellers, this survey defines small-medium business (SMB) as a company with 1-250 employees, mid-market as a company with 250-1,000 employees, enterprise as a company with 1,000-5,000 employees, and large enterprise as a company with 5,000+ employees. The survey was conducted in April 2025 and includes a global pool of respondents across North America, EMEA, and APAC.

Generative AI was extensively used to define the study's focus areas, optimize survey design, and analyze results. Data visualizations were generated using reasoning models to uncover insights and provide creative prototypes, accelerating the production process.

G2 Data was employed to validate various findings as well as to generate insights for this report.

About G2

G2 is the world's largest and most trusted software marketplace. More than 100 million people annually—including employees at all Fortune 500 companies—use G2 to make smarter software decisions based on authentic peer reviews. Thousands of software and services companies of all sizes partner with G2 to build their reputation and grow their business—including Salesforce, HubSpot, Zoom, and Adobe. To learn more about where you go for software, visit www.g2.com and follow us on LinkedIn.

Buyer Behavior Report™

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