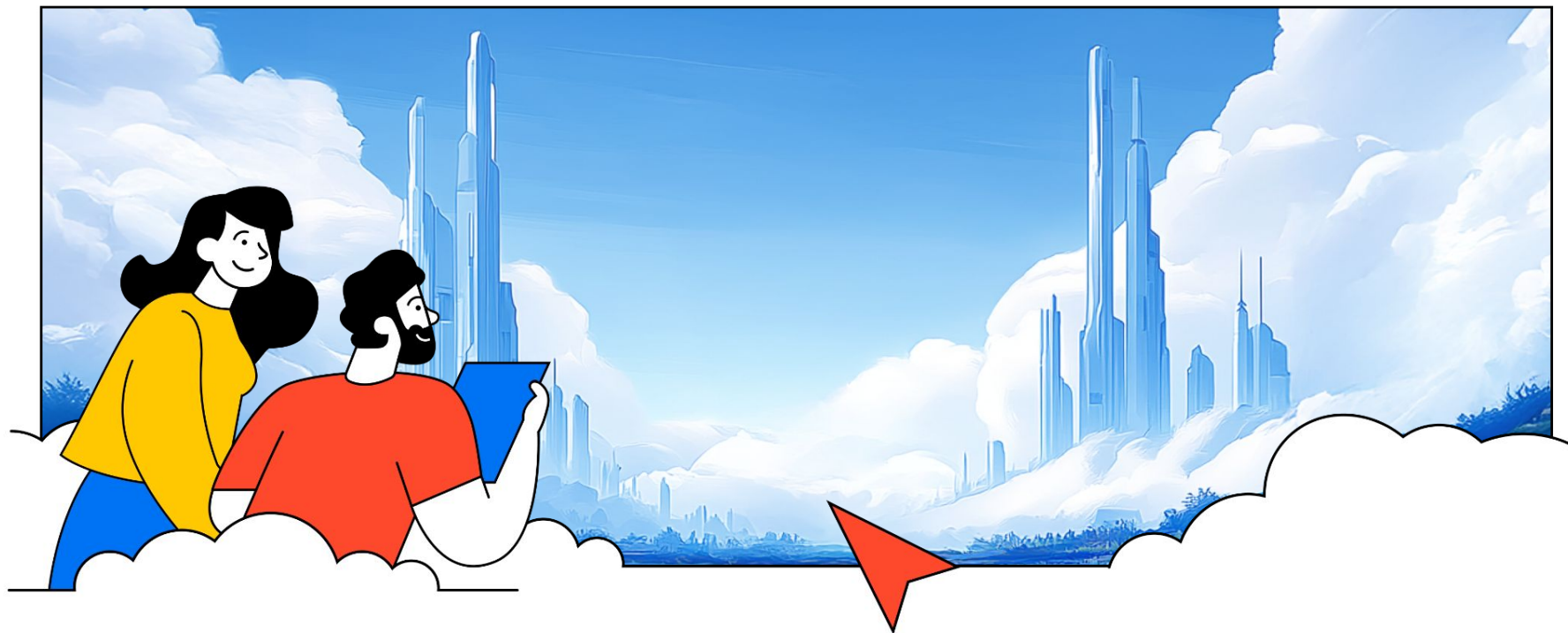




2025 Buyer Behavior Report™

**What CMOs Need to
Know in the Age of AI.**



AI is reshaping everything from how buyers research to who's at the decision-making table and even what they're willing to pay for. I've compiled the most critical takeaways — the insights that directly impact how we drive demand, build trust, and prove ROI in this new AI-driven era.



Sydney Sloan

Chief Marketing Officer
at G2

As a CMO, I'm constantly analyzing the market to understand where B2B buyers are headed and how we can best educate them. This is the second report I've participated in since joining G2 last year, and the results are frankly astounding.

I wanted to share some highlights and insights from the 2025 G2 Buyer Behavior Report, our global survey of B2B software buyers. This year's report highlights how drastically buyer behavior and preferences have transformed in just the last eight months, thanks to AI. And here's the headline: Our research shows that AI chatbots are now the #1 source influencing vendor shortlists.

We interviewed 1,100 B2B decision-makers globally, and the results confirm what many of us have been feeling: AI is no longer optional or experimental. It now stands for "Always Included." For CMOs, that means a fundamental shift to our go-to-market (GTM) playbooks as our buyers' behavior has changed.

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I'm always eager to connect with other CMOs on what's working (and what's not!), so feel free to reach out on LinkedIn to share your thoughts. Let's drive impact together!

TREND 1

Research: Buyers start on LLMs, not Google.

B2B software buyers are making the leap to AI search. 79% of software buyers say AI search has changed how they conduct research, and about 3 in 10 are more productive with AI search than traditional search, and start research with AI search more often than Google.

Review sites and AI search are top research sources for enterprises. Enterprise buyers — those at companies with 1,000-5,000 employees — say review sites (56%) and AI search (55%) are their top 2 sources when researching software products and services. This is in contrast to 38% and 35% for SMB buyers, who still lean on Google as their top research source (47%).

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.



It's time to rethink how your company's solutions show up in the buyer journey. Traditional search engine optimization (SEO) strategies no longer suffice. Today's content must be optimized for generative engine optimization (GEO), designed to answer the specific "jobs to be done" questions your ideal customer profile (ICP) is asking in natural, conversational formats. Peer-led platforms like Reddit and G2 are thriving because they speak directly to how real people solve real problems. Your buyers are making bold, AI-driven bets — it's time to reorient your teams and content strategies around AI-powered search, not just Google.

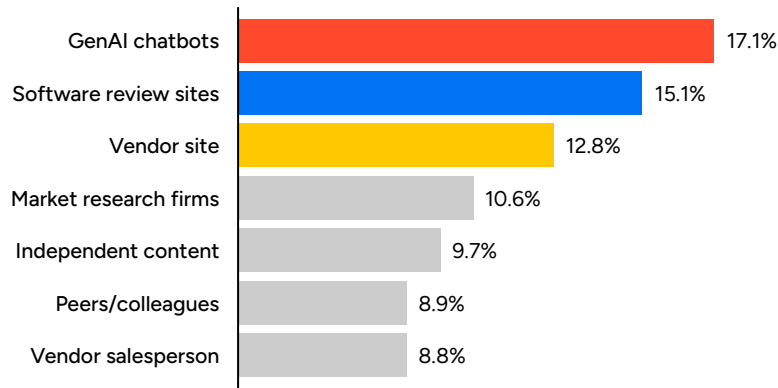
TREND 2

Evaluation: Shortlists are continuing to get shorter.

Credible, trusted sources influence vendor shortlists the most.

GenAI chatbots are the number one source influencing vendor shortlists (17.1%), followed closely by software review sites (15.1%). These sources rank above vendor sites (12.8%), market research firms (10.6%), peers/colleagues (8.9%), and salespeople (8.8%), among others.

Sources that influence vendor shortlisting



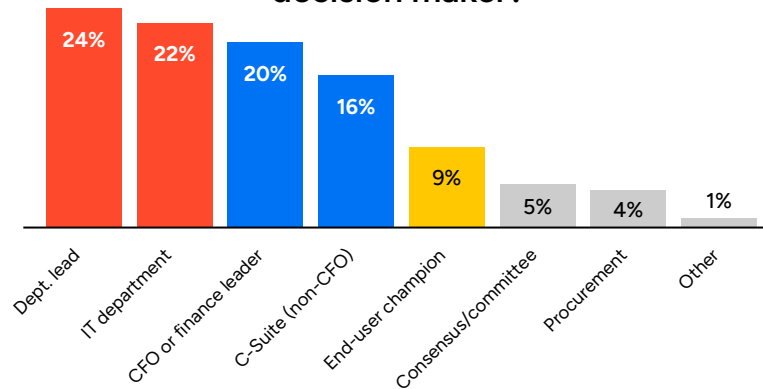
If you want to make the shortlist, you have to know what will get you there and which channels to invest in to position you as a high-influence leader. You must also win trust, authority, and sentiment in the decision phase. That means it's time to swing back in brand. How? Prioritize customer-voice lead content, fueled by thought leadership, versus buying your way into demand capture. Then, invest in your presence on review sites (like G2) and generate GEO content rather than SEO content.

TREND 3

Decision: LLMs are changing how software decisions are made.

The IT department is taking back decision-making power. Last year, we saw the rising influence of the C-suite and the CFO as decision makers for software purchases, but now the IT department is rising in influence. Department leaders are the ultimate decision makers for 24% of global buyers who responded to our survey, closely followed by the IT department at 22%.

Who is the ultimate software purchase decision maker?



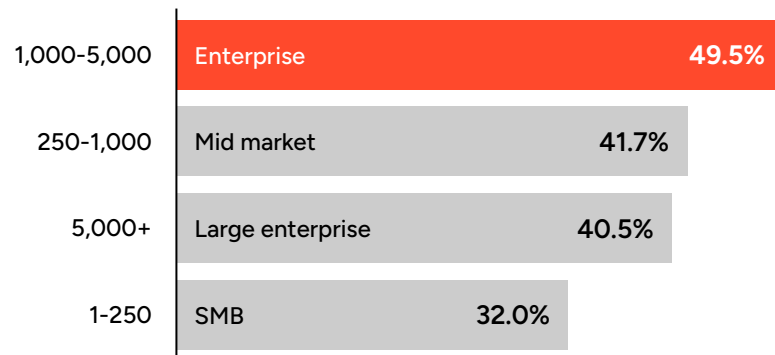
With the rise of AI comes the need for AI orchestration across an organization, creating a demand for IT involvement. As IT teams become increasingly crucial for AI-powered software purchases and gain tighter alignment with RevOps for speed of adoption and use, vendors will need to ensure they're speaking to this crucial persona. This means catering messaging to what IT will care about — integration with existing tools and adherence to their AI policy, for example. I also see the rise of AI architects and AI GTM engineers who design, build, and manage these new workflows.

TREND 4

Renewal: Customers are churning for better AI.

AI is table stakes, so buyers — especially enterprises — are switching for better AI functionality. Half of all buyers from enterprise companies (1,000–5,000 employees) said they have switched vendors for better AI, compared to 42% of buyers from mid-market companies (250–1,000 employees), 41% from large enterprise companies (5,000+ employees), and 32% from SMBs (1–250 employees).

Half of enterprise buyers switched to software with better AI.



Considering the explosion of tools and features in the market, this isn't surprising. Buyers have more options than ever before. Over the past year alone on G2, we saw a 66% uptick in AI products listed in our marketplace, and the volume continues to grow rapidly each month! There is one clear takeaway for software companies: Disrupt yourself, or you'll be disrupted. This requires alignment from the C-suite, with the CMO playing a larger advisory role on company strategy than before. As marketing leaders, we need to have a pulse on competitive intelligence, how our ICP is changing, and how our customers are perceiving us, to evolve our product offerings and how we go to market.



**For additional findings,
download the full
2025 Buyer Behavior Report.**

learn.g2.com/2025-g2-buyer-behavior-report

