Inside the Buyer's Mind

What Shapes B2B Decisions Today

responsive

Deals are won and lost when you're not looking.

RFPs, demos, and negotiations matter. But if you think that's the whole game, you're missing where real decisions take shape. Buyers are weighing options, aligning internally, and setting preferences long before revenue teams ever get a shot. And even after you're in the room, the process continues in conversations and evaluations you'll never see.

This report pulls back the curtain on those hidden dynamics – the "other side" of the buying process – and shows where revenue teams can earn an edge, lose ground, or shift the outcome entirely.

Based on a July 2025 survey of 350 B2B buyers across regions, industries, and company sizes, it takes you inside the full journey, from the first spark of discovery to the final decision. You'll see where buyers spend their time, what drives short lists, how AI is changing the game, and the signals that can tip the outcome in your favor.

In this report, you'll learn:

• **How the buying process starts:** Where buyers begin their search, how early they make the first cut, and the role of AI in vendor discovery

• **What tips the scales:** The decision factors buyers value most, and how these priorities change by industry, region, and company size

• **Where AI is impacting the buyer's journey:** How buyers are using AI in their evaluation processes, how they view vendor AI usage in RFPs, and the red flags that can slow you down

Along the way, we'll highlight practical steps you can take to meet buyers where they are, whether that means showing up earlier in the process, standing out in a crowded field, or adapting to the ways AI is reshaping decision-making.

Each stage of the journey offers an opportunity to gain an edge. This report is here to help you spot the moments that matter most — and act on them.

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Executive summary

B2B buyers are changing how they search, shortlist, and select vendors.

And AI is accelerating the shift. The findings in this report reveal where revenue teams can earn an early edge, what drives decisions, and exactly how AI is impacting the cycle.

The invisible kickoff

90% of buyers conduct research before first contact, and almost two-thirds are already using **GenAI tools** as much as – or more than – traditional search.

Read more →

Where the deal turns

61% of buyers admit they start the process with a preferred vendor, but nearly half say they're open to switching. And buyers say the **RFP response** is the most critical factor in their final decision.

Read more →

AI at the table

Buyers are using AI most in the stages that take them the longest (discovery, evaluation, and supplier engagement). Over a third say vendor use of AI in the sales cycle makes them **more likely** to consider that vendor.

Read more →

Research methodology

Demographics

This research is based on a July 2025 survey of 350 B2B
buyers involved in strategic vendor selection.

All respondents worked at organizations that issued at least 10 RFPs annually. Procurement professionals were required to have participated in at least 10 RFPs in the past year.
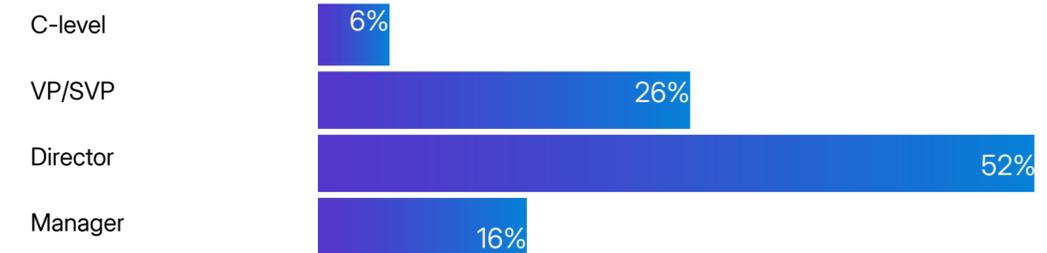
Non-procurement respondents — including leaders in IT, sales, marketing, finance, and other functions — qualified with hands-on involvement in at least one RFP during the same period.

The survey was designed by Adience[1] and Responsive. Data collection was conducted via computer-assisted telephone interviewing (CATI).

[1]Adience is a dedicated B2B market research agency that rebels against boring, cookie-cutter traditional research. Drawing on decades of experience across SaaS markets, IT, and other B2B sectors, Adience delivers trusted answers to the questions that matter, so decision-makers can act with confidence.

JOB LEVEL

- C-level: 6%
- VP/SVP: 26%
- Director: 52%
- Manager: 16%

REGION

- United States: 57%
- Europe: 29%
- Asia-Pacific: 7%
- Africa & Middle East: 7%

NUMBER OF EMPLOYEES

- 500-1,000: 22%
- 1,001-2,000: 26%
- 2,001-3,000: 26%
- 3,001+: 26%

FUNCTION

- Procurement: 29%
- Marketing: 21%
- Sales and Client Services: 20%
- Customer Support: 13%
- Finance: 6%
- Operations: 5%
- IT/Technology: 5%
- Other: 1%
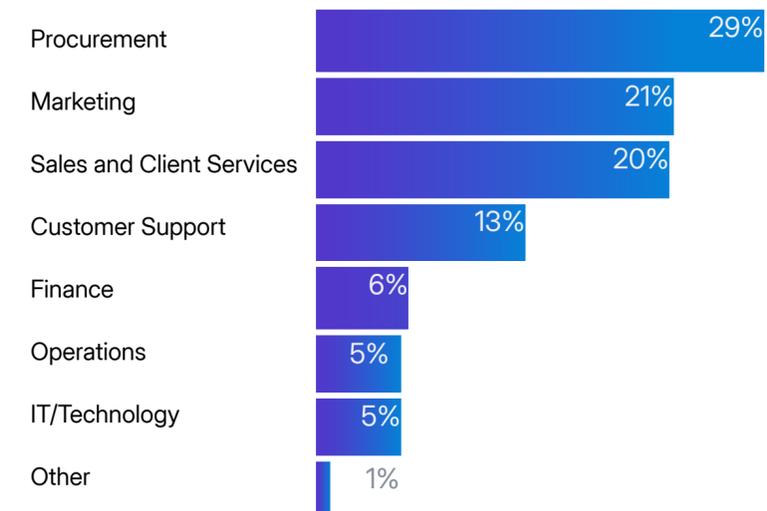
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The invisible kickoff

What happens before you hear from a buyer

Before a call is booked or a question is submitted, most B2B buyers already have a working picture of the vendors they may want to engage. And that picture is rarely vague.

When asked how much they typically know about a vendor before first contact, only 10% of buyers said they do minimal research. The vast majority come prepared:
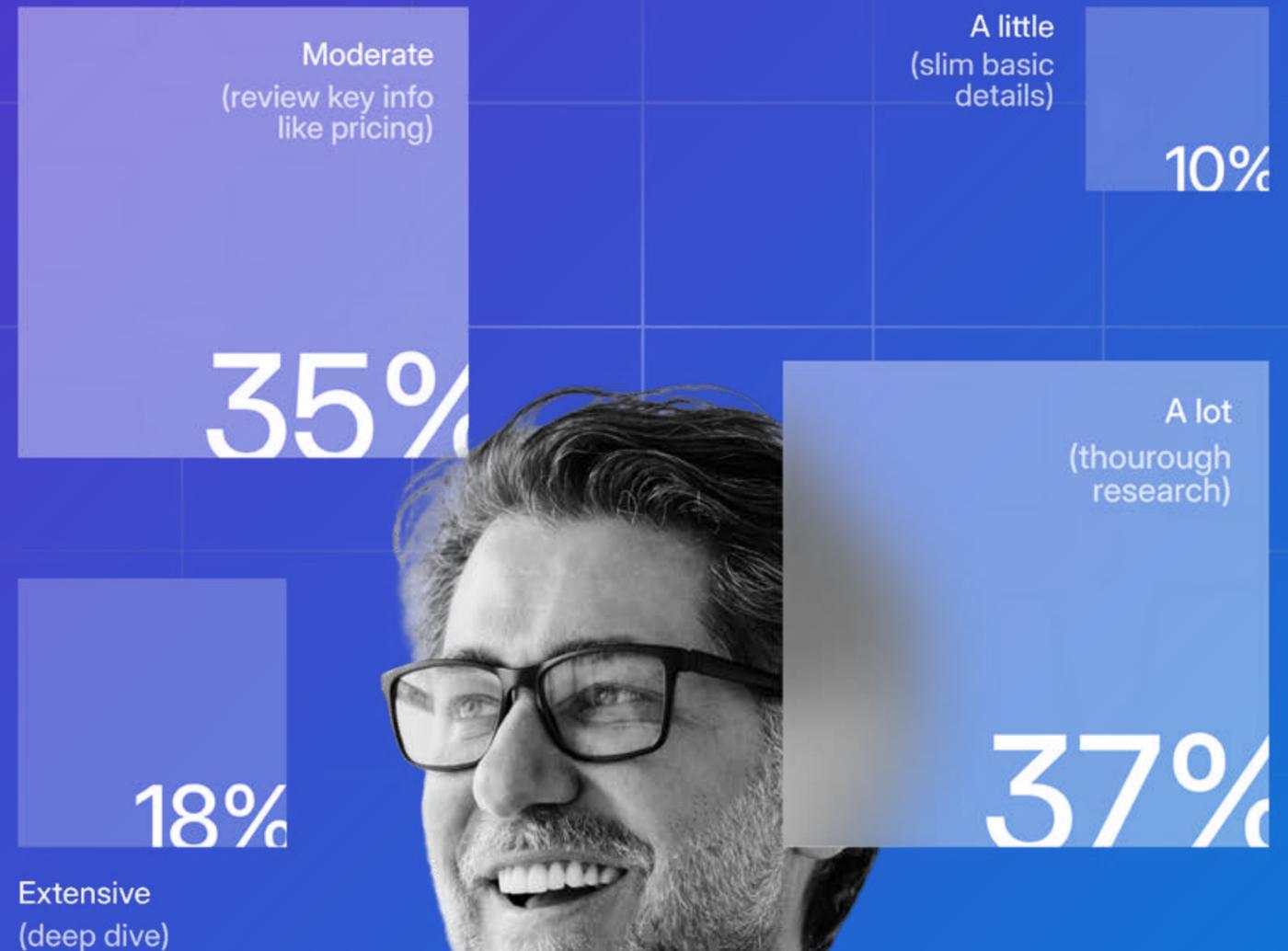
- Over a third (35%) do moderate research, reviewing key details like pricing and capabilities

- 37% go further, conducting thorough comparisons and competitor analyses

- 18% do extensive due diligence — from financial reviews to case studies — before ever reaching out

That level of rigor isn't uniform. In the U.S., buyers are more likely to wait until they've done their homework. Only 3% of American organizations engage vendors with "just a little" knowledge, compared to 17-20% in Europe, APAC, and the Middle East. And among enterprise buyers (3,000+ employees), 30% conduct extensive deep dives up front — nearly double the global average.

Smaller companies and manufacturers take a different approach. Nearly a quarter of mid-sized firms (501-1,000 employees) and 31% of manufacturing buyers say they reach out with only basic awareness, suggesting an earlier engagement window or leaner research operations.

How much buyers know before engaging a vendor

Figure 1

Moderate (review key info like pricing)

35%

A little (slim basic details)

10%

A lot (thourough research)

37%

Extensive (deep dive)

18%

What happens before you hear from a buyer

(continued)

Even before formal requests go out, buyers are actively filtering. Most start with a long list of five to eight vendors, weighing relevance, reputation, and perceived fit. But that funnel narrows quickly: **more than half shortlist just three or fewer vendors.**

Region and company size shape these dynamics, too. U.S. buyers cast a narrower net on average (6.8 vendors on the long list) compared to other regions (average of 7.6 on the long list). Mid-sized companies (501-1,000 employees) are more exploratory, averaging 8.2 vendors on the long list. But when it's time to shortlist, it's actually larger enterprises (3,000+ employees) that retain more options, averaging 3.9 vendors in final consideration.

This early-stage behavior sets the tone for everything that follows. If a vendor doesn't surface in this phase (or fails to impress), they may never make it to the table at all.

Average number of vendors considered

Figure 2

Long list	Short list
7.6	3.5
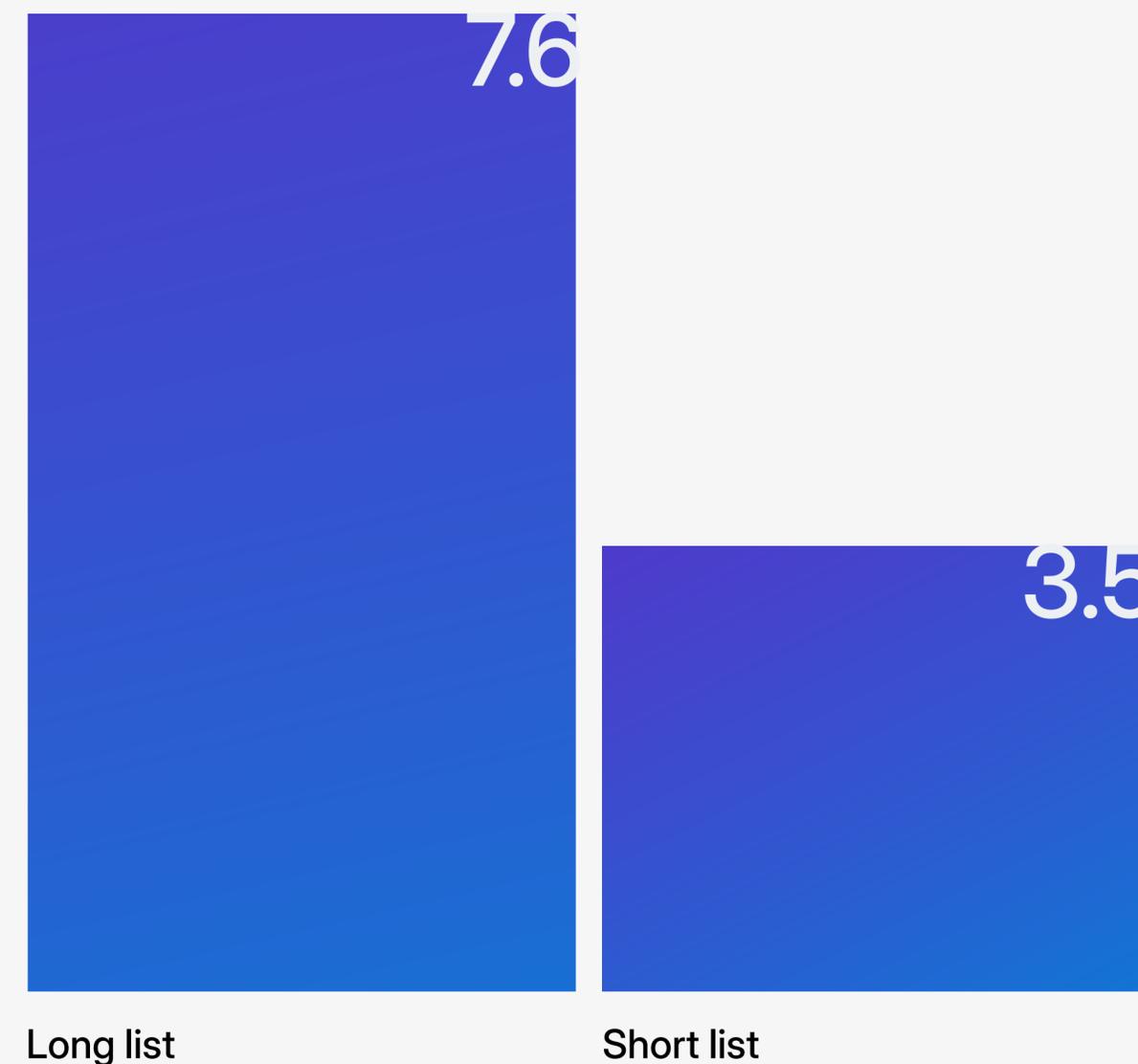
What vendors can do
before the first touchpoint

Buyers are forming opinions and filtering vendors long before outreach. Here's how to earn your place at the start.

Turn RFP signals into early-stage assets.

The questions buyers ask later in the process — security standards, integration details, compliance proof — are clues to what matters most. Don't wait until you're asked. Share that information upfront so buyers can find it in discovery.

Match depth to buyer type.

Mid-sized organizations and manufacturers often engage with only basic awareness, so surface quick-hit value early. Enterprises, meanwhile, demand rigor from the start: case studies, benchmarks, and trust documentation.

Where buyers start looking

Buyers don't wait for vendors to introduce themselves. By the time most are ready to engage, they've already started looking. And they're doing it on their own terms.
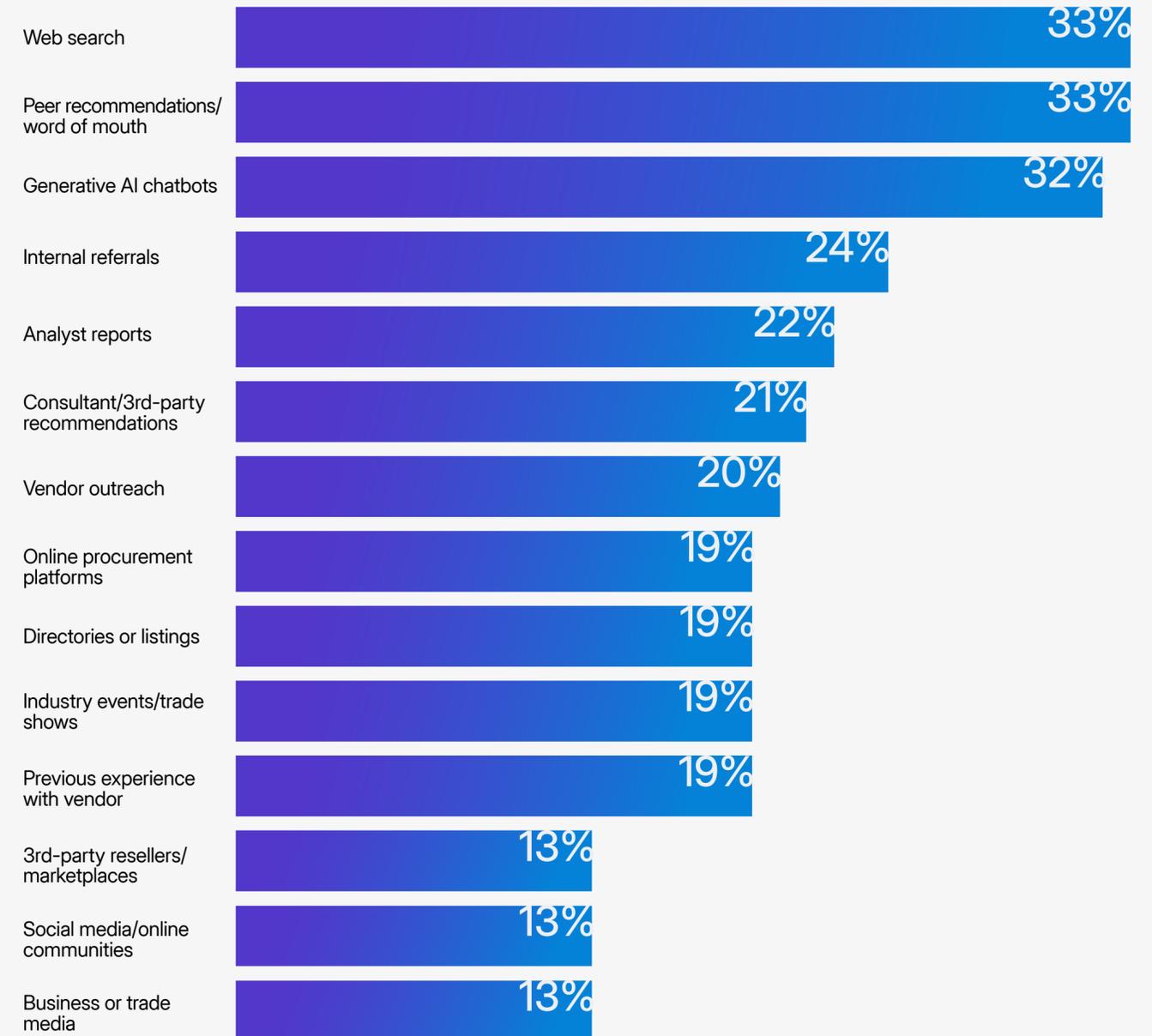
The top sources for discovering new vendors include search engines, peer recommendations, and generative AI tools, each cited by roughly a third of buyers. Together, these channels reflect a self-directed, research-heavy approach

that's reshaping how vendors get found. The presence of **GenAI chatbots** toward the top of the list is striking, and it's a topic we'll dive deeper into next in this chapter.

Beyond the top three, other sources like internal referrals, analyst reports, and third-party consultants round out the picture, showing that influence can come from both inside the organization and through trusted external partners.

Top sources buyers use to discover new vendors

Figure 3

Source	%
Web search	33%
Peer recommendations/word of mouth	33%
Generative AI chatbots	32%
Internal referrals	24%
Analyst reports	22%
Consultant/3rd-party recommendations	21%
Vendor outreach	20%
Online procurement platforms	19%
Directories or listings	19%
Industry events/trade shows	19%
Previous experience with vendor	19%
3rd-party resellers/marketplaces	13%
Social media/online communities	13%
Business or trade media	13%

Where buyers
start looking

(continued)

But averages don't tell the full story. Different buyers take different paths, and the patterns vary by region, company size, and industry. This variability means that your visibility needs to meet your buyers where they are — not where you wish they were.

Notable differences in top discovery channels

Figure 4

Group with higher use	Discovery channel	Percentage (vs. average)
Region		
Africa & Middle East	Consultant/3rd-party recs	52% (vs. 21%)
Europe	Peer recommendations	45% (vs. 33%)
Industry		
Technology/Software	GenAI chatbots	56% (vs. 32%)
Technology/Software	Directories/listings (e.g., G2)	36% (vs. 19%)
Healthcare & Life Sciences	Internal referrals	48% (vs. 24%)
Insurance	Previous experience with vendor	44% (vs. 19%)
Media & Entertainment	Social media/online communities	32% (vs. 13%)

What vendors can do
to get discovered

Buyers aren't waiting to be pitched. Instead, they're searching, scanning, and asking their networks. To show up where it matters:

Plan for GenAI visibility.

A third of buyers are already using GenAI tools to surface vendors. That means your messaging needs to be structured in ways that large language models can pull, parse, and surface correctly.

Close the referral loop.

Peer and consultant recommendations remain powerful, but they don't happen by accident. Equip your existing customers, advisors, and channel partners with the stories, stats, and quick pitches they can easily share when asked for a recommendation.

Surface the "hidden proof" earlier.

Use your Strategic Response Management platform to spot the questions buyers ask most – in RFPs, DDQs, or informal exchanges – and publish those answers upfront so buyers find and trust you before formal evaluations begin.

The rise of GenAI in vendor research

It happened fast. What started as a new experiment is already a core research tool. Nearly a quarter of B2B buyers now use generative AI more than traditional search when evaluating vendors. Another 40% use both equally.

In total, nearly two-thirds of buyers are using GenAI at least as much as search engines — a remarkable shift in a very short amount of time. For many, asking a chatbot is now as natural as typing into Google.

That acceleration is disrupting the early stages of the buying journey and shifting how vendors need to think about visibility. The way buyers gather initial context is no longer limited to web searches, peer input, or analyst sites. It now includes conversational tools that summarize, compare, and recommend vendors in real time.

This shift isn't evenly distributed. Certain sectors and regions are further along:

- In the **technology and software** industry, 80% of buyers now use GenAI at least as much as traditional search, compared to 59% of buyers in other industries who say the same. More than half of tech buyers (56%) report using chatbots as a top source to discover new vendors, compared to just 28% across other industries.

- In the **U.S.**, 48% of buyers say they use GenAI to discover new vendors, compared to just 14% across other regions.

- Among **larger organizations** (2,000+ employees), GenAI usage for vendor discovery jumps to 42%, compared to 18% of smaller businesses (501-1k employees) that report using chatbots.

These findings are striking and indicate a paradigm shift in the digital ecosystem. Today, if the LLMs and databases powering GenAI chatbots can't find you (or make sense of what you offer), buyers may never get far enough to consider you.

Figure 5

How buyers use GenAI to research vendors

Use GenAI chatbots more than traditional search
22%

Use GenAI chatbots and traditional search equally
40%

Use traditional search more than GenAI chatbots
30%

Do not use GenAI chatbots
8%

What vendors can do
to stay visible in a GenAI world

As AI chatbots become a primary research tool, vendors need to think beyond traditional SEO and focus on how content gets found and interpreted.

Make your content LLM-ready.

GenAI tools pull from accessible sources like your website, help center, public trust centers, and review platforms. If your content is unclear, gated, or blocked from crawling, you're at an immediate disadvantage.

Prioritize clarity and structure.

Use plain language, clear formatting, and well-labeled sections. These cues help large language models understand and summarize your offerings accurately.

See what buyers see.

Run buyer-style questions through GenAI tools — not just about your company, but about your competitors, too. If your answers lag, it's a signal your content isn't surfacing where it matters.
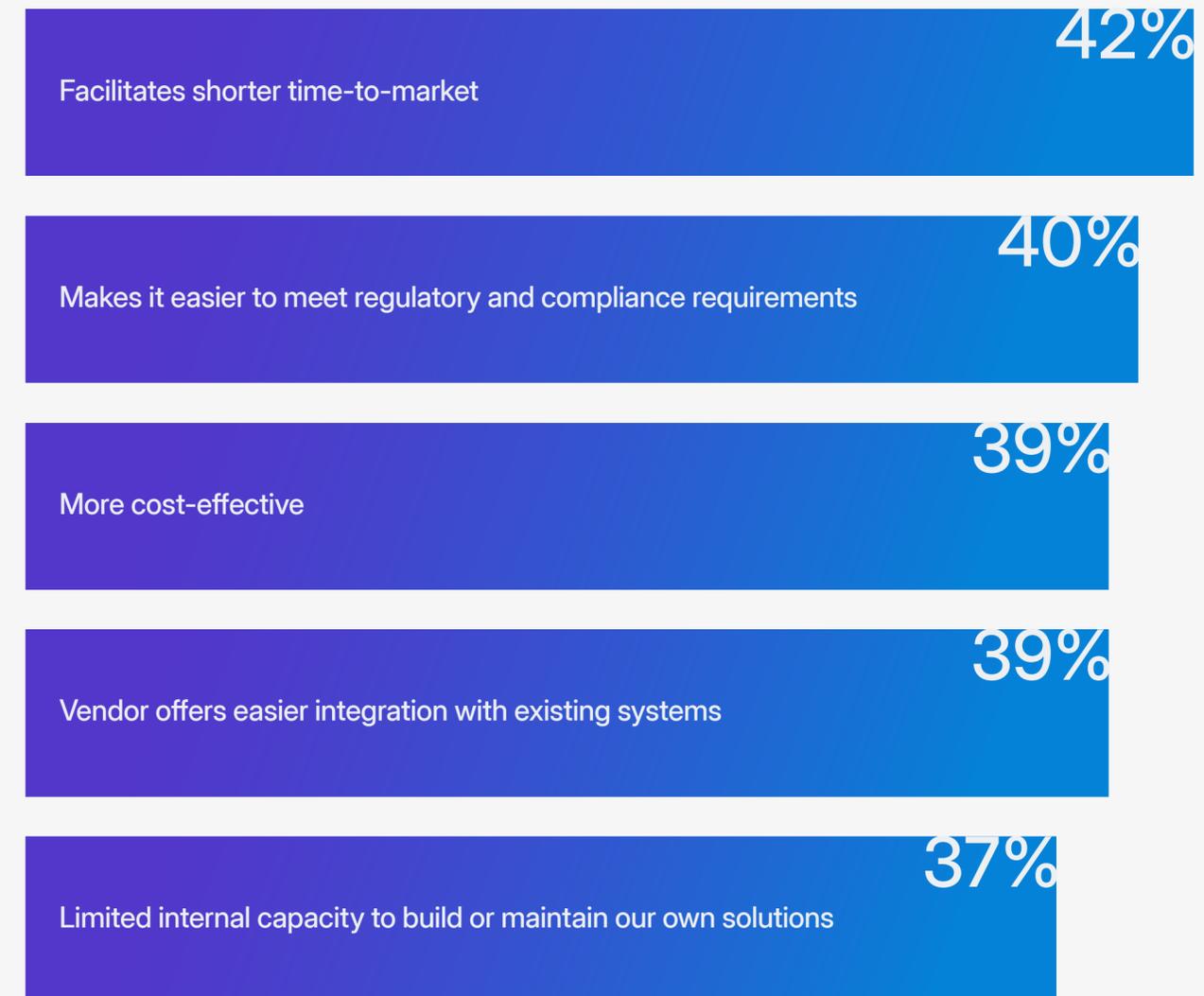
What buyers look for in AI products

AI has changed how buyers research and also how they evaluate (more on that later). When the product they are buying is AI itself, the stakes — and the scrutiny — are different.

Buyers are prioritizing factors beyond product performance when evaluating AI solutions. With the speed at which business moves today, organizations want to activate AI quickly, so it's no surprise that 42% of buyers say that the decision to buy vs. build is grounded in a shorter time-to-market.

AI buyers also want confidence that what they're buying will hold up under pressure: legal, technical, ethical. The benefits are practical — faster deployment, fewer compliance headaches, easier integration, and cost efficiency — especially for organizations without the internal capacity to go it alone.

Why buyers choose to purchase AI products (vs. build)

Figure 6

42%
Facilitates shorter time-to-market

40%
Makes it easier to meet regulatory and compliance requirements

39%
More cost-effective

39%
Vendor offers easier integration with existing systems

37%
Limited internal capacity to build or maintain our own solutions

What buyers look for in AI products
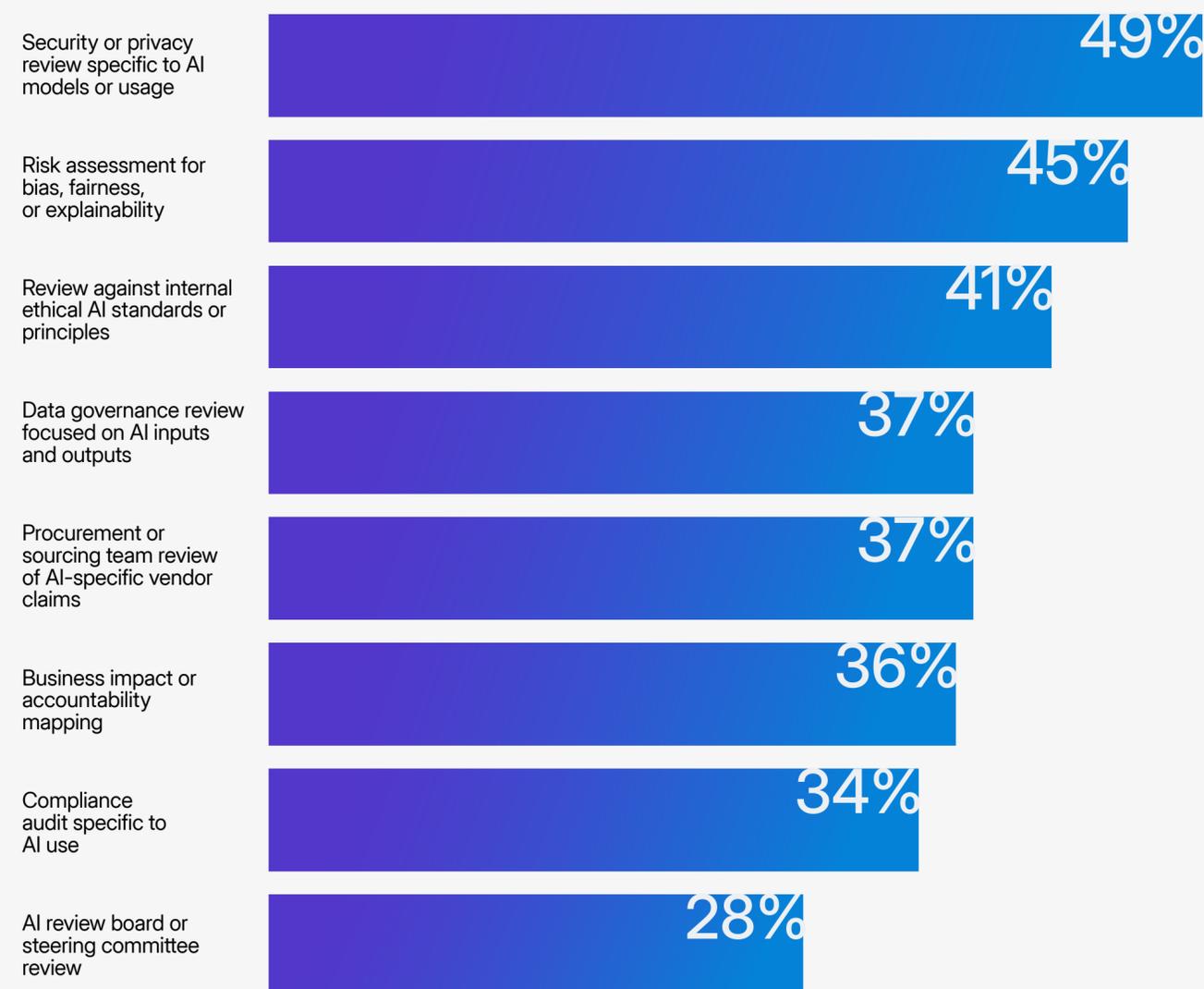
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But the bar doesn't drop just because they choose to buy. AI products are subject to more rigorous internal review than most traditional software. Almost half of buyers (49%) run security and privacy assessments tailored to AI models. They evaluate fairness and explainability (45%). They test against internal ethics standards (41%) and data governance frameworks (37%), often with input from compliance or procurement teams.

The shape of those reviews varies by region. The data indicate that UK and other non-U.S. buyers are more likely to focus on privacy and data governance. American organizations, by contrast, are more likely to flag compliance and procurement as critical checkpoints.

For AI vendors, this means your product isn't the only thing being evaluated; how it's built, governed, and supported matters just as much.

Internal reviews conducted when evaluating AI products

Figure 7

Category	Percentage
Security or privacy review specific to AI models or usage	49%
Risk assessment for bias, fairness, or explainability	45%
Review against internal ethical AI standards or principles	41%
Data governance review focused on AI inputs and outputs	37%
Procurement or sourcing team review of AI-specific vendor claims	37%
Business impact or accountability mapping	36%
Compliance audit specific to AI use	34%
AI review board or steering committee review	28%

What vendors can do
to meet the AI buyer's bar

Evaluating an AI product often means looking well beyond the feature set. Buyers want proof that what you're building – and how you're building it – can withstand pressure and close examination.

Lead with trust.

Don't wait for buyers to request documentation. Share a security profile or trust center early in the process. Or better yet, make it publicly accessible.

Make it self-serve and searchable.

The best trust centers enable buyers to explore security, compliance, and ethical AI materials at their own pace, utilizing built-in conversational GenAI tools that quickly surface the answers they need.

Treat the process like part of the product.

How you explain your approach to privacy, fairness, and governance can be just as important as what the product does.

Where the deal turns
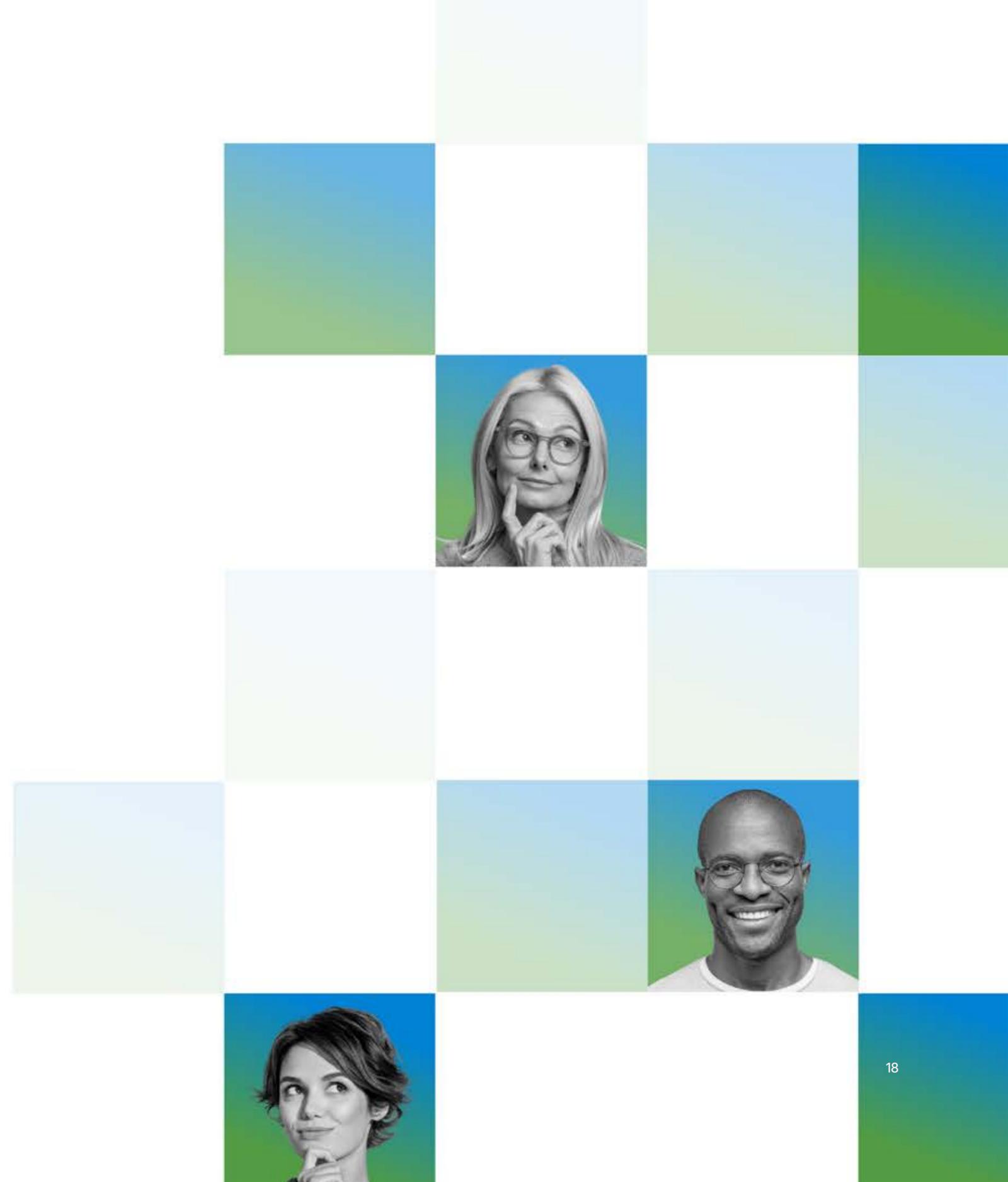
When RFPs enter the picture

At many organizations — especially larger ones — issuing an RFP is a core part of the purchasing process. But that doesn't mean every decision starts with one. Buyers are selective about when and why they formalize the process.

The most common reason? Price pressure. Nearly half (47%) of respondents said they issue RFPs when they want to get a better deal from new or existing vendors.
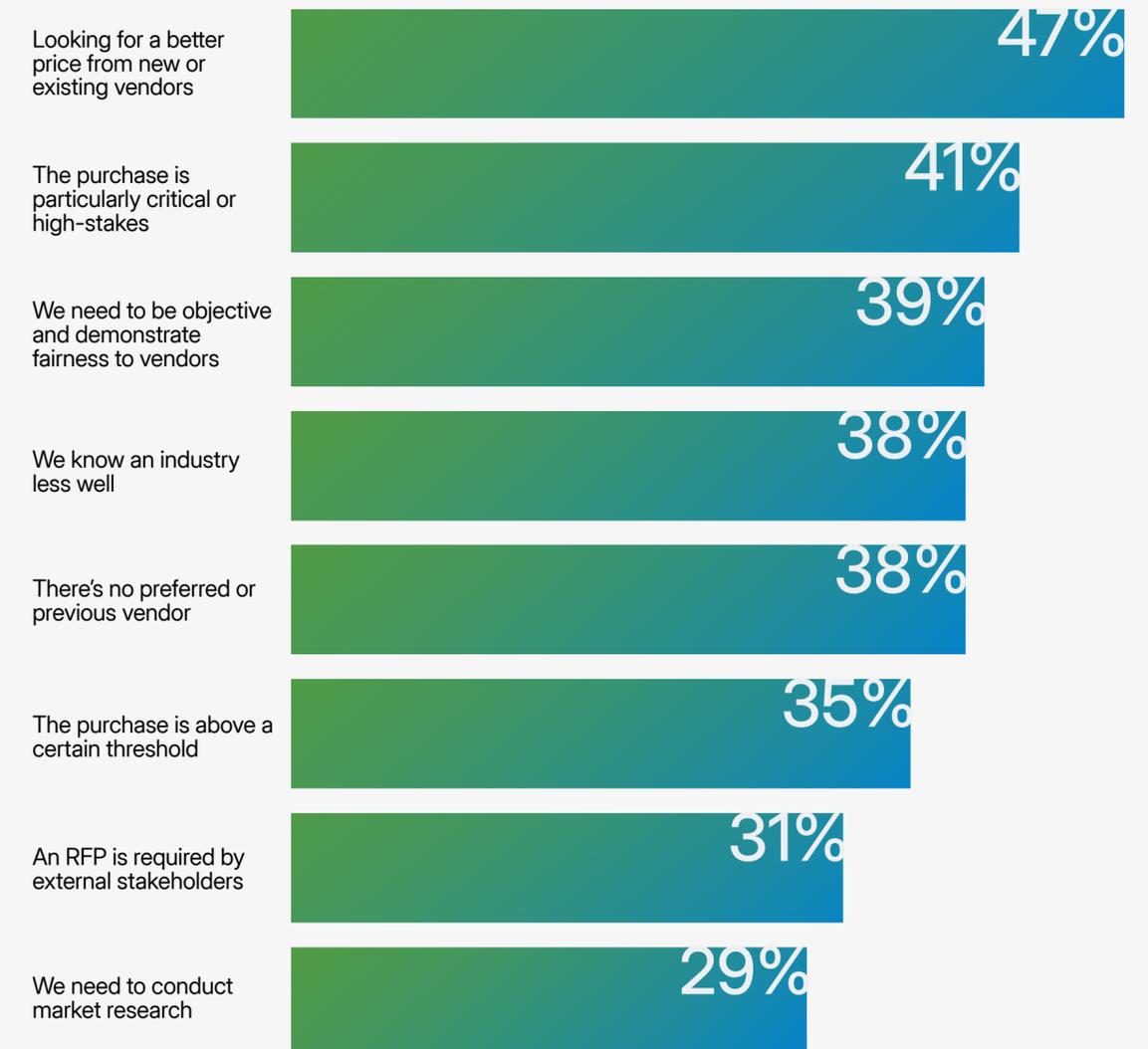
Price isn't the only driver. Criticality also plays a major role. 41% of buyers said they issue RFPs when a purchase is particularly high-risk or high-impact. In other words, when the cost of making the wrong decision is high, so is the likelihood that the process will be formalized.

Buyers also turn to RFPs when they need to demonstrate objectivity (39%), when they are less familiar with an industry (38%), or when there's no incumbent or preferred vendor (38%).

What's equally revealing is what buyers didn't say. No one reported that their company sends everything through RFP. And none said they have no formal process at all. That reinforces what many revenue teams already sense: RFPs are used deliberately, not universally.

What triggers an RFP

Figure 8

Looking for a better price from new or existing vendors	47%
The purchase is particularly critical or high-stakes	41%
We need to be objective and demonstrate fairness to vendors	39%
We know an industry less well	38%
There's no preferred or previous vendor	38%
The purchase is above a certain threshold	35%
An RFP is required by external stakeholders	31%
We need to conduct market research	29%

What vendors can do
to earn a spot before the RFP

When an RFP appears, it's not random. Behind every request is a buyer motivation waiting to be uncovered. The better you understand that "why," the sharper your response can be.

Anticipate the trigger points.

If your solution solves high-stakes problems or you know the organization is new to your industry, assume the deal will go to RFP and prepare accordingly.

Use early conversations as intel.

A simple question – "What prompted this RFP?" – can give you context your competitors may miss and position you to speak directly to buyer concerns.

Tailor your response.

If it's about cost, emphasize savings. If it's risk, show proof of reliability.
If it's objectivity, lean on evidence and comparisons.

Who has the advantage (and what can shift it)

On paper, every vendor gets a fair shot. In practice, it's more complicated.

A majority of buyers (61%) admit they start the process with a preferred vendor in mind. But nearly half say they're open to switching from their initial preference. For others – about 16% – the decision is already made, and the RFP is little more than a formality.
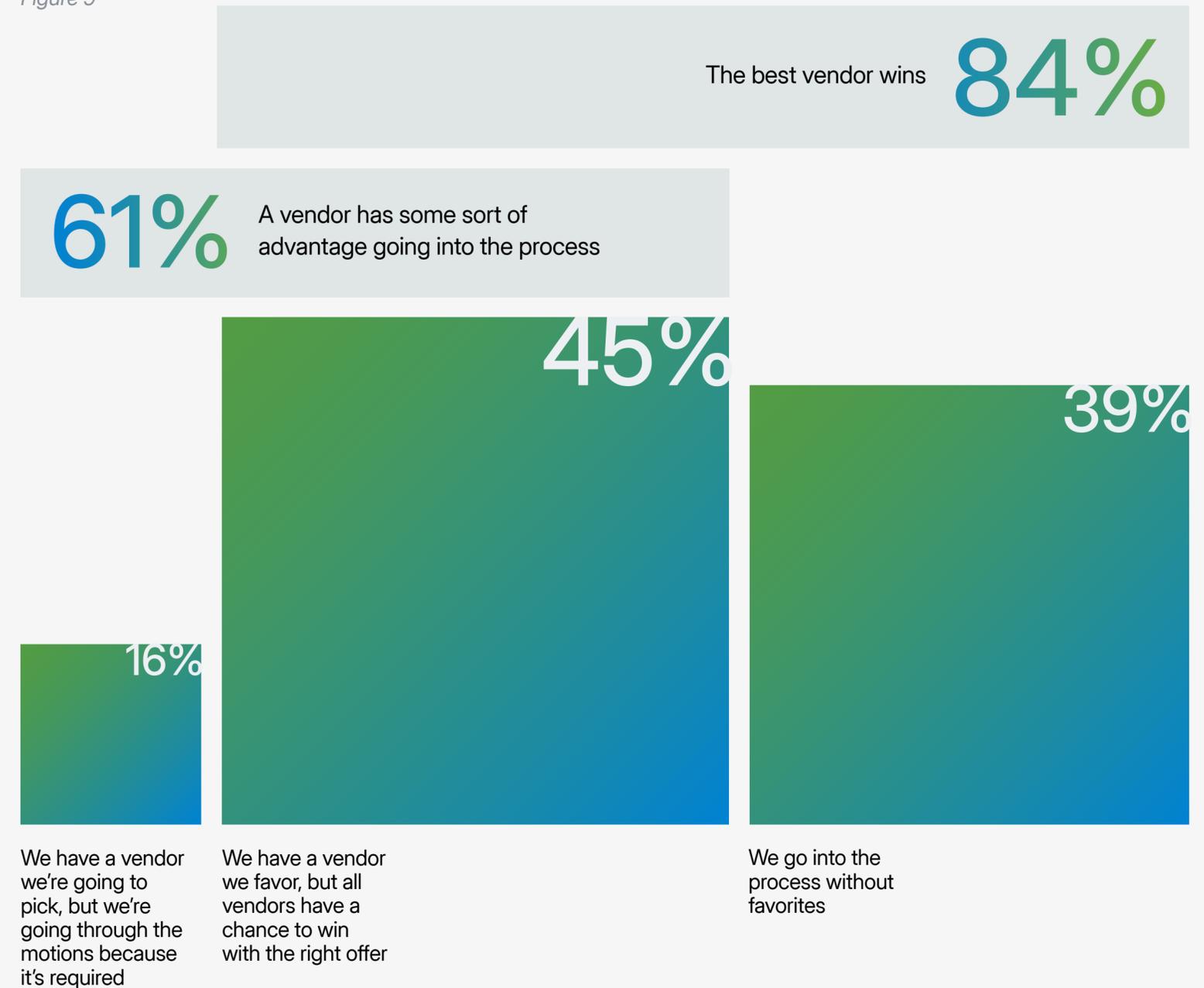
The picture shifts depending on who you're selling to:

- In **manufacturing**, 54% say they already know who they'll pick, even as they go through the motions of an RFP

- In the **U.S.**, buyers are more likely to start without a favorite (49%), compared to just 37% elsewhere

- In **other regions**, the opposite holds true: nearly two-thirds (63%) say they start with a vendor they already favor

Still, a strong performance can shift the outcome. 84% of buyers say the best vendor ultimately wins — even when one enters with an advantage.

How buyers approach the RFP process

Figure 9

The best vendor wins **84%**

61% A vendor has some sort of advantage going into the process

16% We have a vendor we're going to pick, but we're going through the motions because it's required

45% We have a vendor we favor, but all vendors have a chance to win with the right offer

39% We go into the process without favorites

Who has the advantage (and what can shift it)

(continued)

So what actually shapes buyer opinion along the way? Buyers say the biggest influences aren't casual conversations or one-off interactions; they're actually the formal, structured inputs.

• 81% said the **RFP response** itself was critical, making it the most important factor to shape buying decisions

• 78% say that **vendor presentations and demos** carry major weight

• 77% rely on their own **independent research**

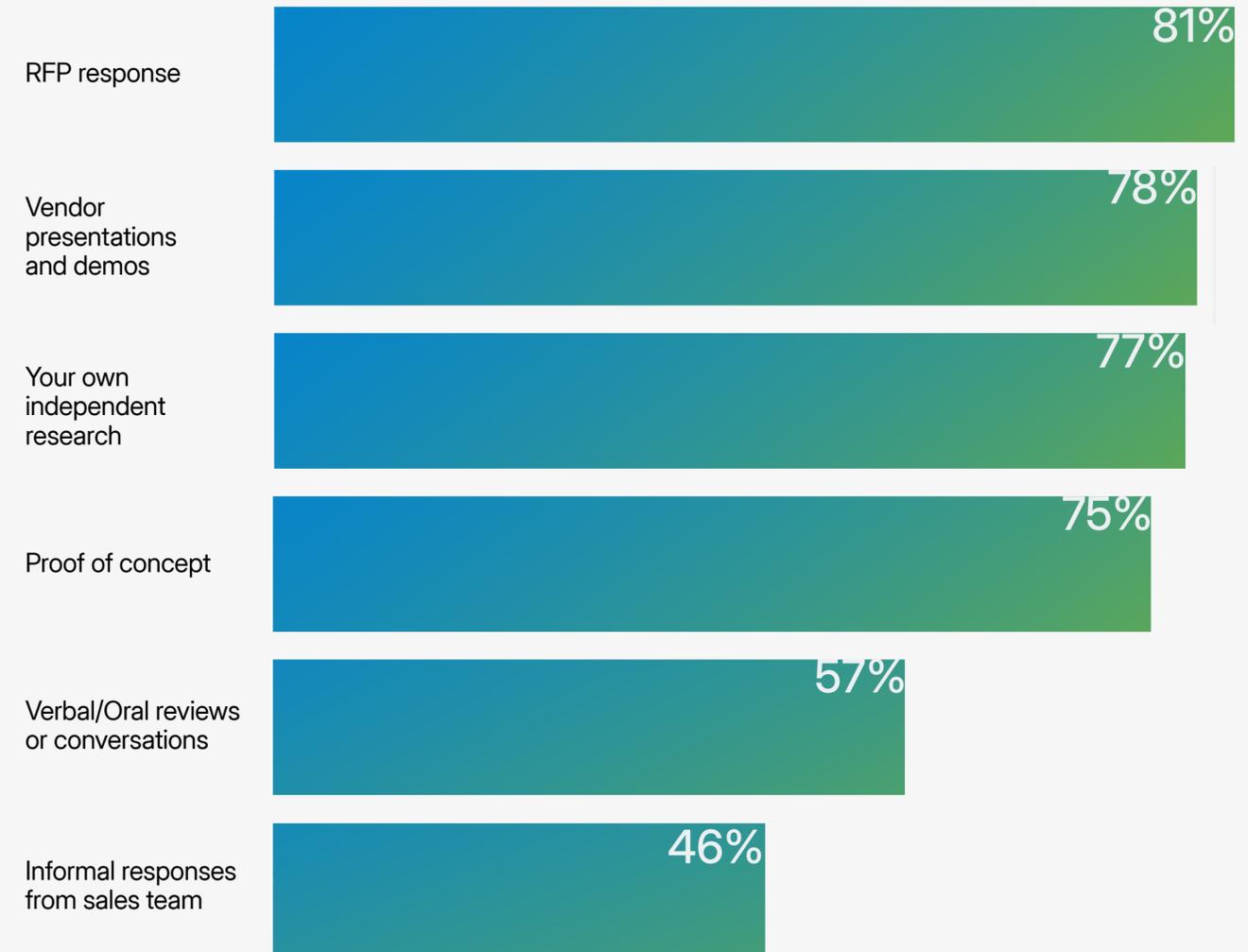• 75% said **proof of concept** makes a notable impact

Less formal inputs, like conversations or ad hoc responses, still matter, but they often play a secondary role.

What's striking here is the order. The RFP response outweighs even proof of concept, showing just how much buyers rely on the formal record.

The good news: Even when a vendor enters with an edge, the door isn't closed. Buyers still respond to what's in front of them, and it's the formal materials that tend to move the needle. A standout proposal, a confident demo, and tangible proof of capability can make all the difference.

Importance of factors shaping buying decisions

Figure 10

Factor	Percentage
RFP response	81%
Vendor presentations and demos	78%
Your own independent research	77%
Proof of concept	75%
Verbal/Oral reviews or conversations	57%
Informal responses from sales team	46%

*Percentages reflect share of respondents rating each factor "very" or "extremely" important

What vendors can do to shift the odds

Even if another vendor starts ahead, how you show up in the process still matters.

Don't assume it's locked.

Most buyers have a favorite, but for the vast majority of buyers, the best vendor wins. A strong proposal can reset the pecking order.

Treat the RFP like a proving ground.

Buyers say the RFP response, demo, and proof of concept are what shape their thinking most. Make each one tailored to the buyer's priorities and ensure they tell a consistent story across every stage of the process.

Show them what good looks like.

Help buyers build confidence in your offering with well-structured responses, relevant examples, and a clear, credible path forward.

Factors that influence the final choice

Fit matters. Price matters. But expertise wins. In the past year, the most heavily weighted factor wasn't features or pricing. It was industry expertise, cited by more than half of buyers (52%) as carrying significant weight. More than any spec sheet or feature comparison, buyers valued whether a vendor truly understood their terrain, especially in regions like the UK and industries like tech and financial services.

But that wasn't universal. Buyers in healthcare, insurance, and manufacturing placed less emphasis here, suggesting some segments may prioritize execution over context.

Pricing (49%) and product fit (46%) also sat high on the list, especially among smaller organizations and buyers in manufacturing. Innovation followed closely, particularly for tech buyers and smaller orgs, though it mattered less in sectors like insurance

where stability often trumps novelty. Compliance and implementation confidence carried weight for the smallest organizations, which are more exposed to risk and have fewer internal resources.
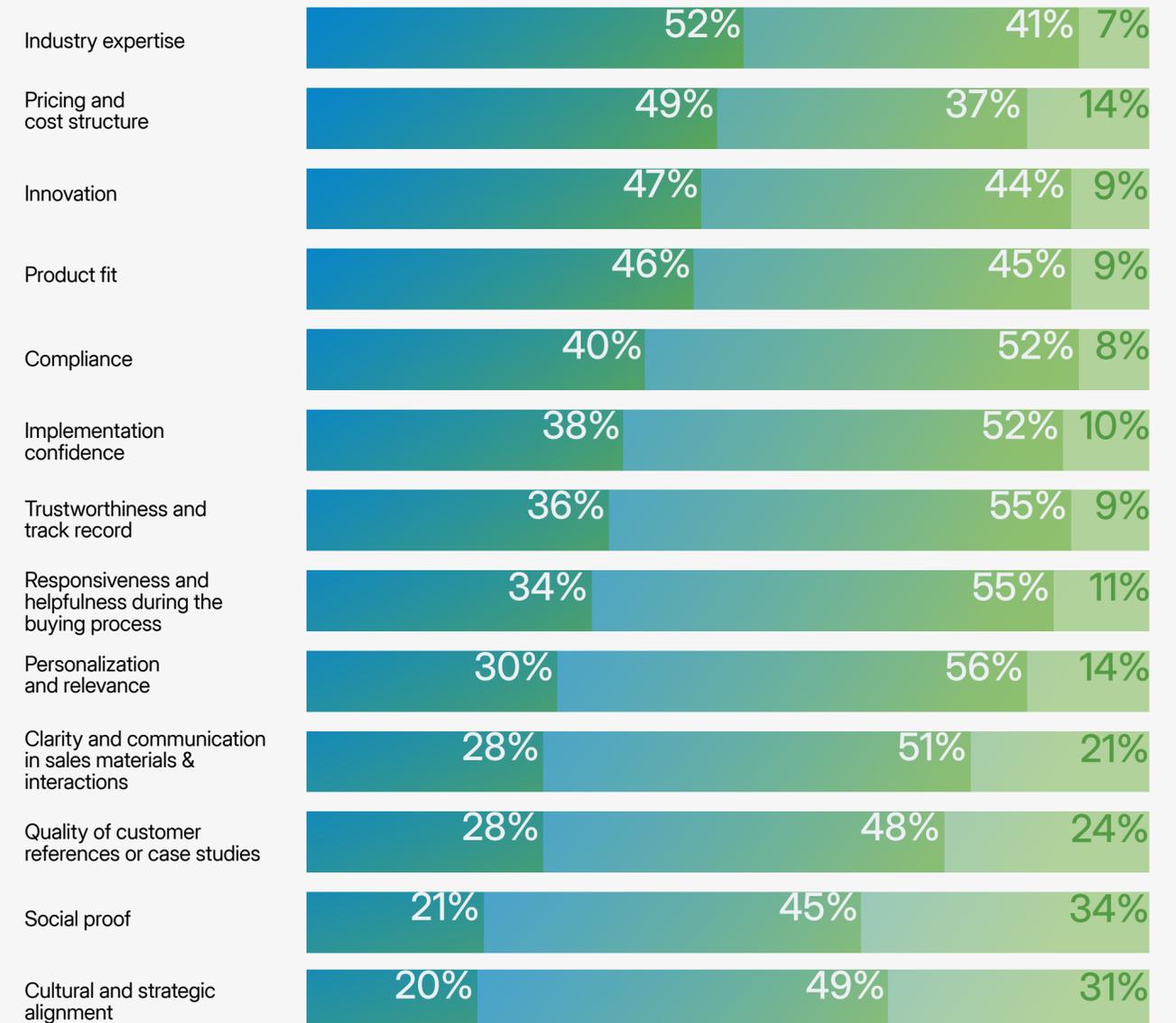
What's striking is where the line falls. Industry expertise, pricing, innovation, and product fit consistently shaped the final choice. Below that, factors like compliance, implementation, and — surprisingly — personalization fell into the second tier. Despite the buzz around personalization, fewer than a third (28%) of buyers gave it significant weight, making industry expertise almost twice as influential.

The takeaway is that buyers are doing more than simply evaluating products. They're looking for partners who know their world, can deliver on core needs, and inspire confidence in execution.

What matters most in vendor selection

■ Significant weight   ■ Moderate weight   ■ Little weight

Figure 11

	Significant weight	Moderate weight	Little weight
Industry expertise	52%	41%	7%
Pricing and cost structure	49%	37%	14%
Innovation	47%	44%	9%
Product fit	46%	45%	9%
Compliance	40%	52%	8%
Implementation confidence	38%	52%	10%
Trustworthiness and track record	36%	55%	9%
Responsiveness and helpfulness during the buying process	34%	55%	11%
Personalization and relevance	30%	56%	14%
Clarity and communication in sales materials & interactions	28%	51%	21%
Quality of customer references or case studies	28%	48%	24%
Social proof	21%	45%	34%
Cultural and strategic alignment	20%	49%	31%

What vendors can do
to stand out when it counts

At decision time, buyers are weighing more than features alone. To earn the final nod:

Show your depth, not just your specs.

Industry expertise is the strongest differentiator and is almost twice as likely to carry weight as personalization. Prove you understand your buyer's context with case studies, benchmarks, and insights that reflect their realities.

Make the basics work harder.

Pricing and product fit still matter. Be transparent about costs, and show exactly how your solution maps to buyer needs — especially for smaller organizations.

Frame innovation around relevance.

Highlight what's new, but connect it to what buyers actually care about: speed, risk reduction, and future readiness.

AI at the table

responsive

Where the process slows, and AI picks up

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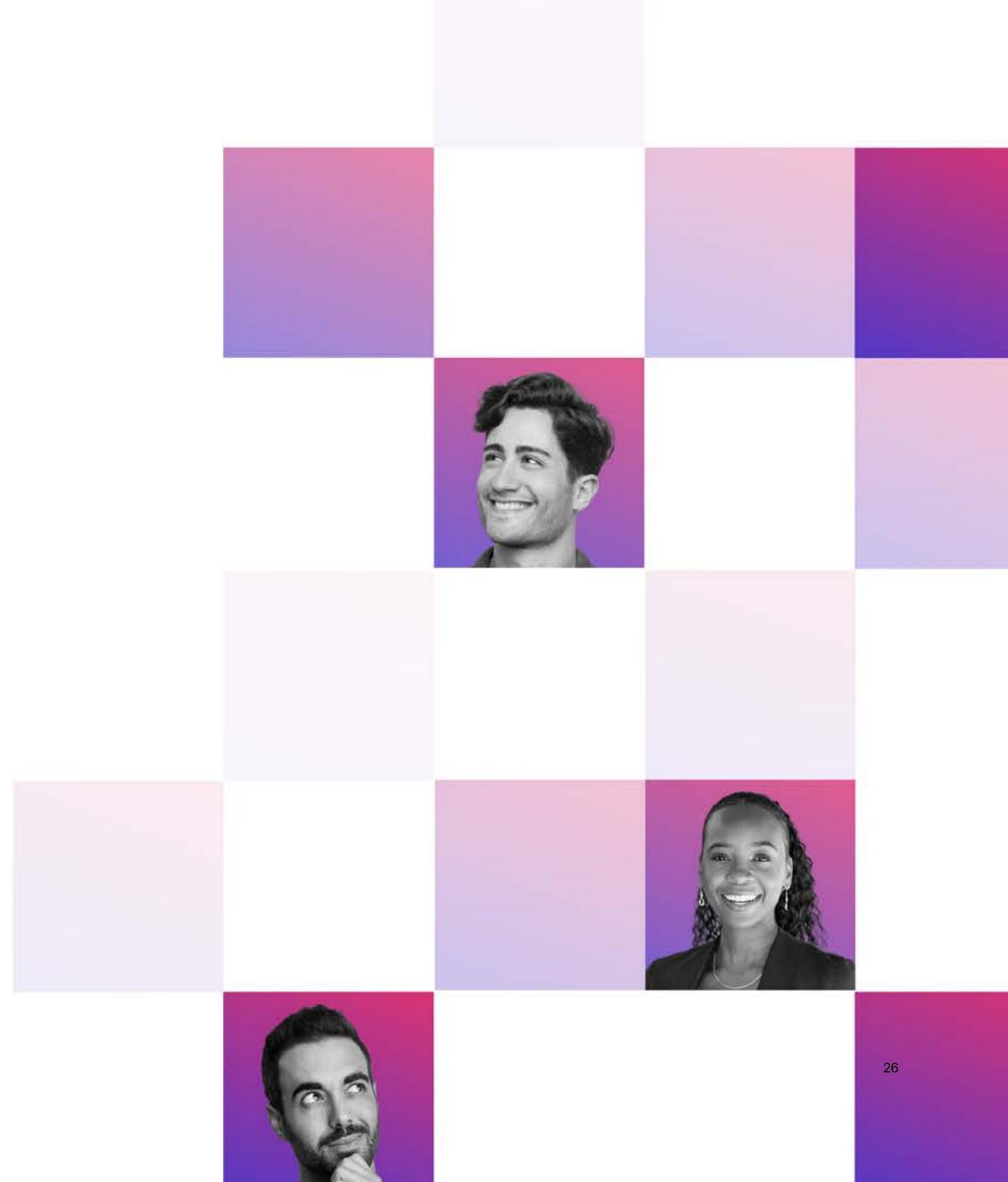
Even in well-run buying processes, some steps take far longer than others — and they're often the ones where revenue teams have the most at stake.

When asked which parts of the buying journey take the most time, four steps rose to the top:
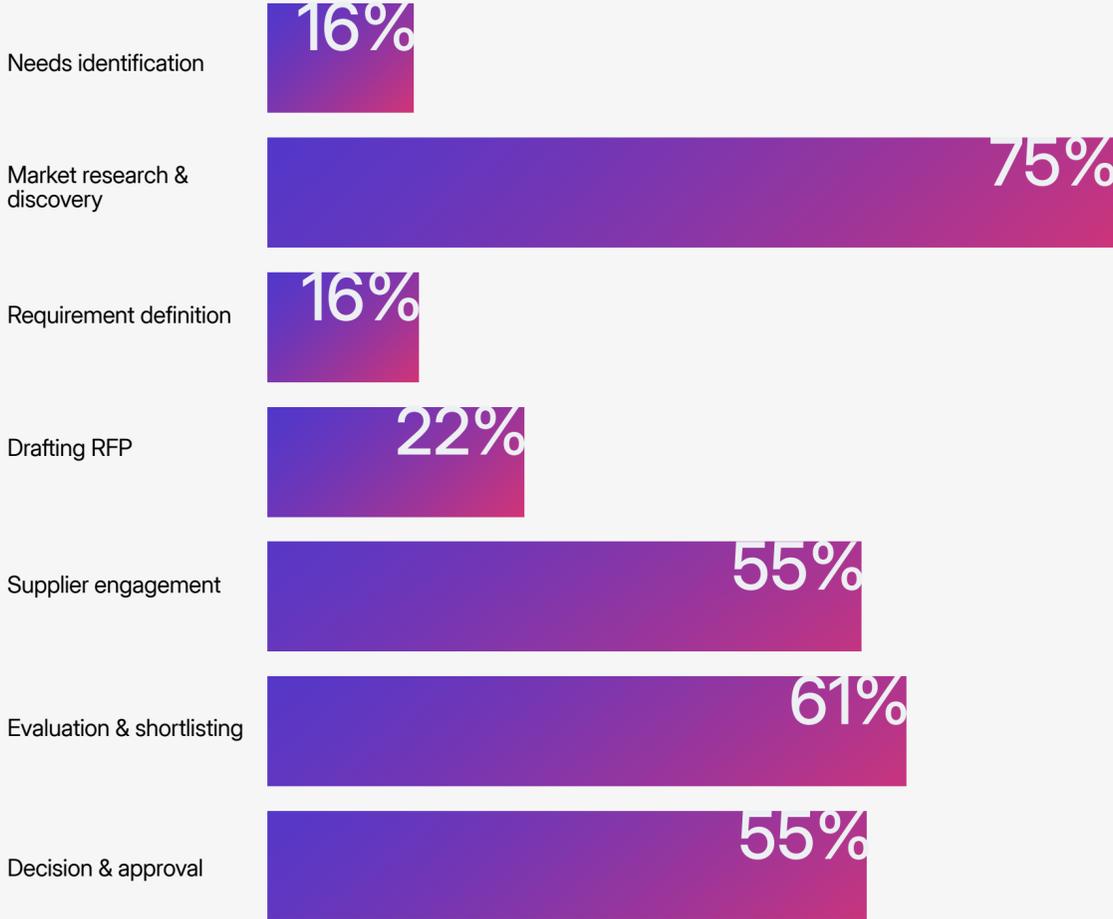- Market research and discovery (75%)
- Evaluating and shortlisting vendors (61%)
- Supplier engagement (55%)
- Decision-making (55%)

These are the stages where buyers are paying close attention, forming impressions, weighing options, and setting the tone for what comes next.

Drafting RFPs also made the list for some buyers, though it varied by segment. While just 22% overall ranked this step in the top three most time-consuming, that number rose significantly in more structured environments: 44% in healthcare, 33% among large enterprises, and 30% in the U.S.

Buying steps that take the longest (top 3)

Figure 12

Needs identification **16%**

Market research & discovery **75%**

Requirement definition **16%**

Drafting RFP **22%**

Supplier engagement **55%**

Evaluation & shortlisting **61%**

Decision & approval **55%**

Where the process slows, and AI picks up

(continued)

When it comes to AI usage across the buying cycle, this research reveals that AI is already part of the process for many organizations, though how it's used — and how much — varies widely.
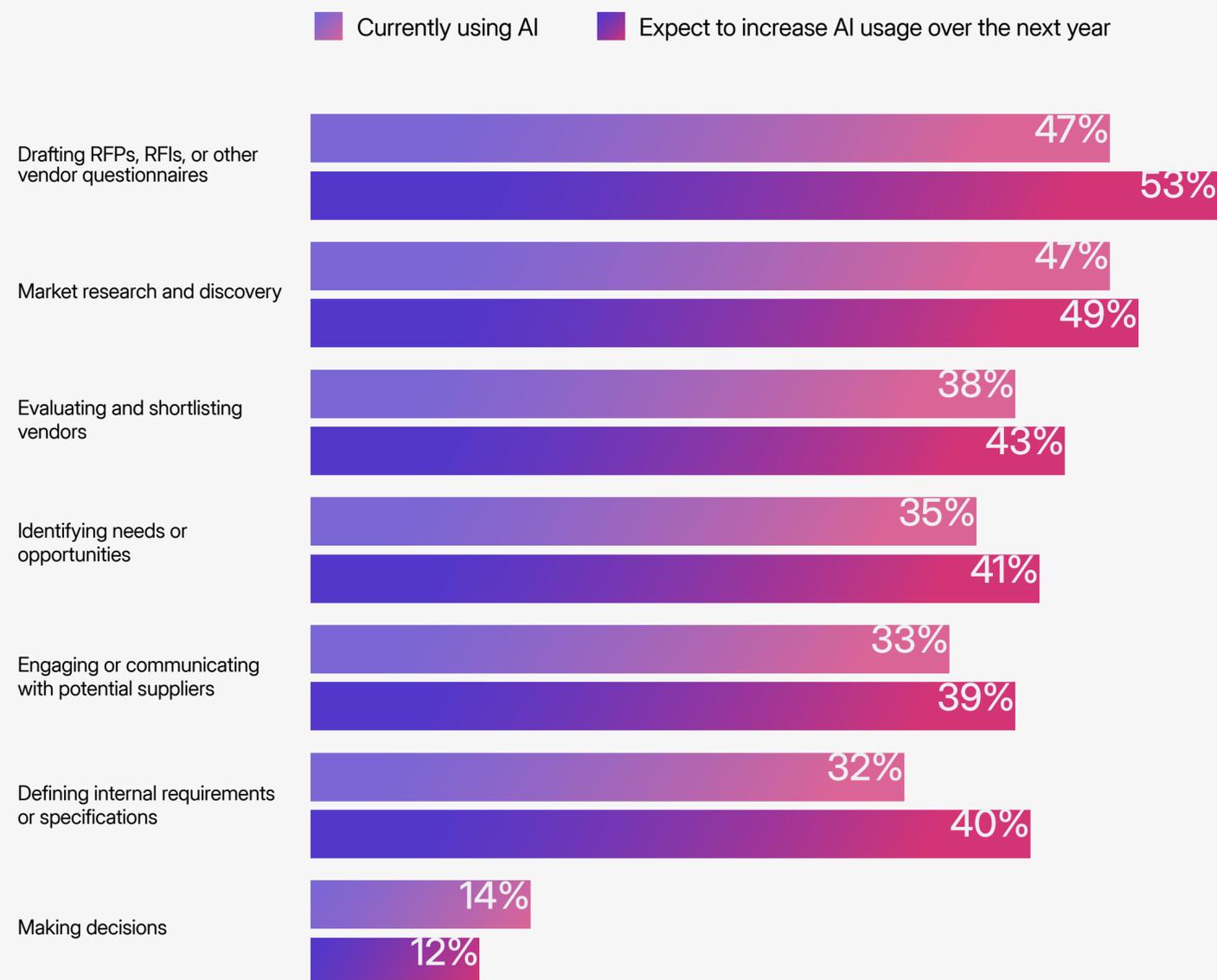
It's no coincidence that AI is gaining traction in the very stages that slow things down the most. About half of buyers say they use AI for drafting vendor questionnaires and conducting market research (47% each), and a growing number are applying it to supplier engagement (33%) and vendor evaluation (38%).

That trend is only expected to grow. Buyers plan to expand AI use across the board, especially in the early and middle stages of the cycle. The biggest jumps are expected in drafting vendor questionnaires and in market research. Interestingly, the largest increase in AI usage is expected **in the UK,** where 71% of buyers say they plan to ramp up AI usage in the research and discovery phase.

Fewer buyers anticipate applying AI to decision-making, where human judgment still carries more weight.

Buyer AI usage across sales cycle stages

Figure 13

■ Currently using AI   ■ Expect to increase AI usage over the next year

Stage	Currently using AI	Expect to increase
Drafting RFPs, RFIs, or other vendor questionnaires	47%	53%
Market research and discovery	47%	49%
Evaluating and shortlisting vendors	38%	43%
Identifying needs or opportunities	35%	41%
Engaging or communicating with potential suppliers	33%	39%
Defining internal requirements or specifications	32%	40%
Making decisions	14%	12%

What vendors can do
to keep up with AI-driven buyers

AI is reshaping the buying process, from how buyers work to how they assess you.

Help buyers self-serve earlier.

As AI takes on more of the early research and discovery work, buyers are moving further down the funnel before engaging. Publish content that answers key questions upfront and is optimally structured for generative engines.

Anticipate the AI-accelerated buyer.

With more buyers using AI to shortlist and compare vendors, make sure your materials are structured in ways both machines and people can parse quickly.

Know where AI doesn't reach.

Most buyers still rely on human judgment for decision-making. Don't overlook the importance of relationships, trust, and real partnerships (especially at the finish line).

AI's influence and the rules around it

AI is changing how buyers prioritize, how long they engage, and what they expect from vendors.

More than 4 in 10 buyers say AI has already made it easier to compare vendors (44%), reduced the number of RFPs issued (38%), or helped surface new vendors they wouldn't have otherwise found (37%).
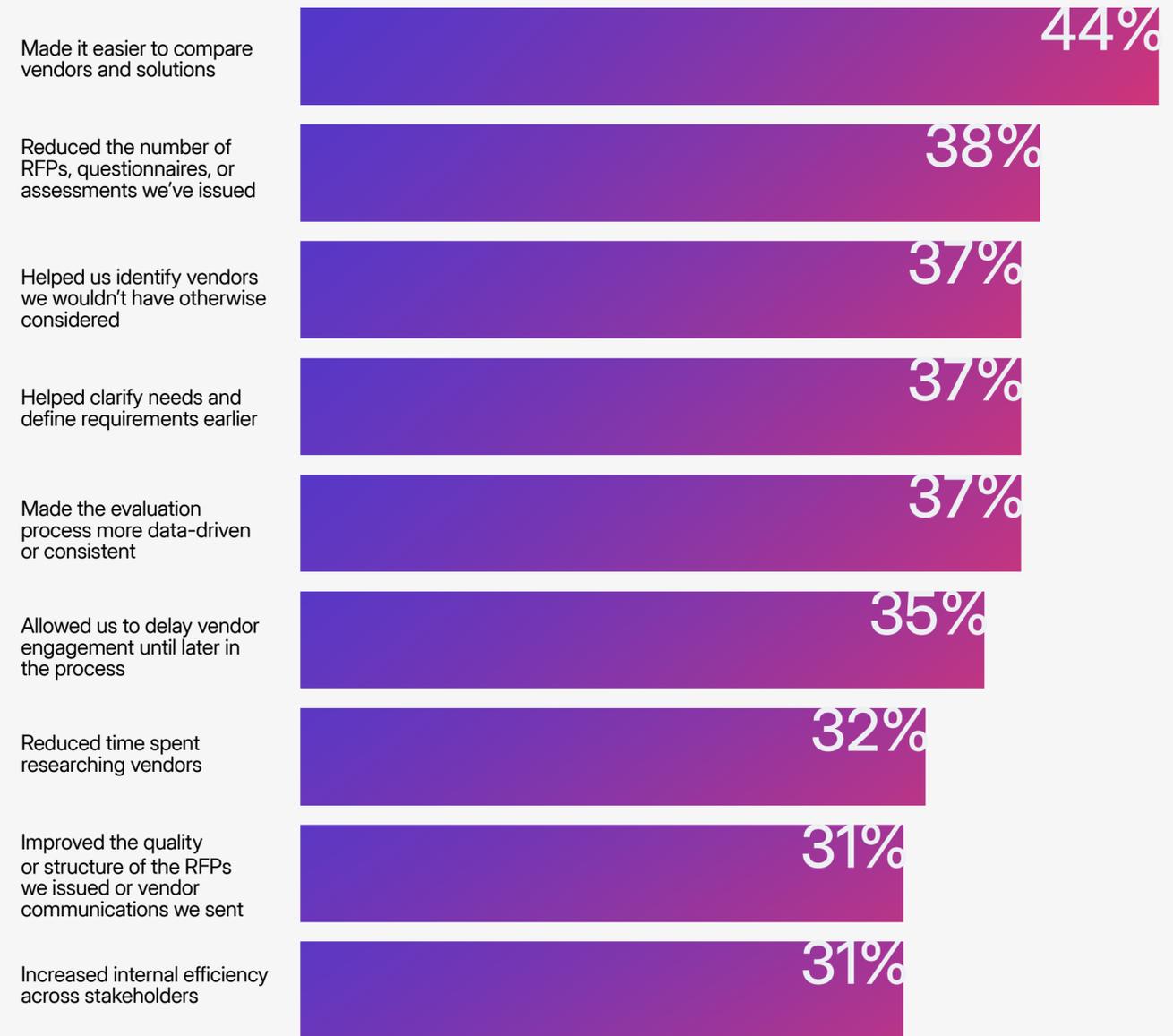
Buyers also say AI is helping them move faster and get clearer. It's being used to define needs (37%), bring more data into evaluations (37%), and in some cases, delay vendor engagement altogether.

That impact varies by region and industry:

• In the **UK**, buyers are ahead of the curve:
  - 51% say AI is making evaluations more data-driven
  - 49% report spending less time researching vendors
  - 44% say it has allowed them to delay engagements

• In **financial services** and **insurance**, AI is helping with comparisons:
  - 58% (FinServ) and 56% (insurance) say AI is making it easier to compare vendors and solutions, compared to 44% overall

Impact of AI on the buying process

Figure 14

Category	Percentage
Made it easier to compare vendors and solutions	44%
Reduced the number of RFPs, questionnaires, or assessments we've issued	38%
Helped us identify vendors we wouldn't have otherwise considered	37%
Helped clarify needs and define requirements earlier	37%
Made the evaluation process more data-driven or consistent	37%
Allowed us to delay vendor engagement until later in the process	35%
Reduced time spent researching vendors	32%
Improved the quality or structure of the RFPs we issued or vendor communications we sent	31%
Increased internal efficiency across stakeholders	31%

AI's influence and the rules around it

But as AI's influence grows, so does the governance around it. Nearly half of buyers say their organizations now restrict entering sensitive data into AI tools (46%). Many require fact-checking of AI-generated outputs produced by their teams (42%), and a growing share expect vendors to disclose their own use of AI in proposals (39%). Guidelines on ethical usage, tool approval, and AI-related risks are becoming standard.

For vendors, these internal controls create a more structured — and often more cautious — buying environment. Materials that once passed with little scrutiny may now face internal fact-checking or compliance review. Responses that rely heavily on AI or fail to demonstrate human oversight can be flagged or slowed down. In some cases, buyers may need additional documentation just to move forward.

The more tightly governed the organization, the more revenue teams need to anticipate these checks. That includes curating accurate, trusted on-demand knowledge, understanding how buyers define responsible AI usage, and being ready to align with internal review standards.

AI rules inside buying organizations

Figure 15

Restrictions on entering sensitive company information into AI tools	46%
Requirements to fact-check or verify AI-generated outputs	42%
Policy requiring vendors to disclose their use of AI in products or proposals	39%
Guidelines on ethical AI use, including bias mitigation or transparency	39%
Guidelines on which AI tools can be used	38%
Definition of acceptable vs. prohibited use cases of AI during purchasing	36%
Compliance with legal or regulatory frameworks	29%

What vendors can do
in a policy-driven process

AI is speeding things up, but it's also triggering new checks, standards, and expectations.

Don't assume your content will be taken at face value.

Buyers may now fact-check claims, flag AI-generated language, or require extra validation before progressing.

Be proactive about accuracy.

Make sure all messaging, metrics, and value statements are verifiable and clearly aligned to the buyer's industry or use case.

Understand the compliance lens.

In regulated industries, buyers may be bound by internal AI policies. Know what they expect, and come prepared with the documentation or controls they'll need to move forward.

What buyers think about AI usage

AI is increasingly showing up in how vendors operate, and buyers are starting to take note. Some are even using AI themselves to detect it.
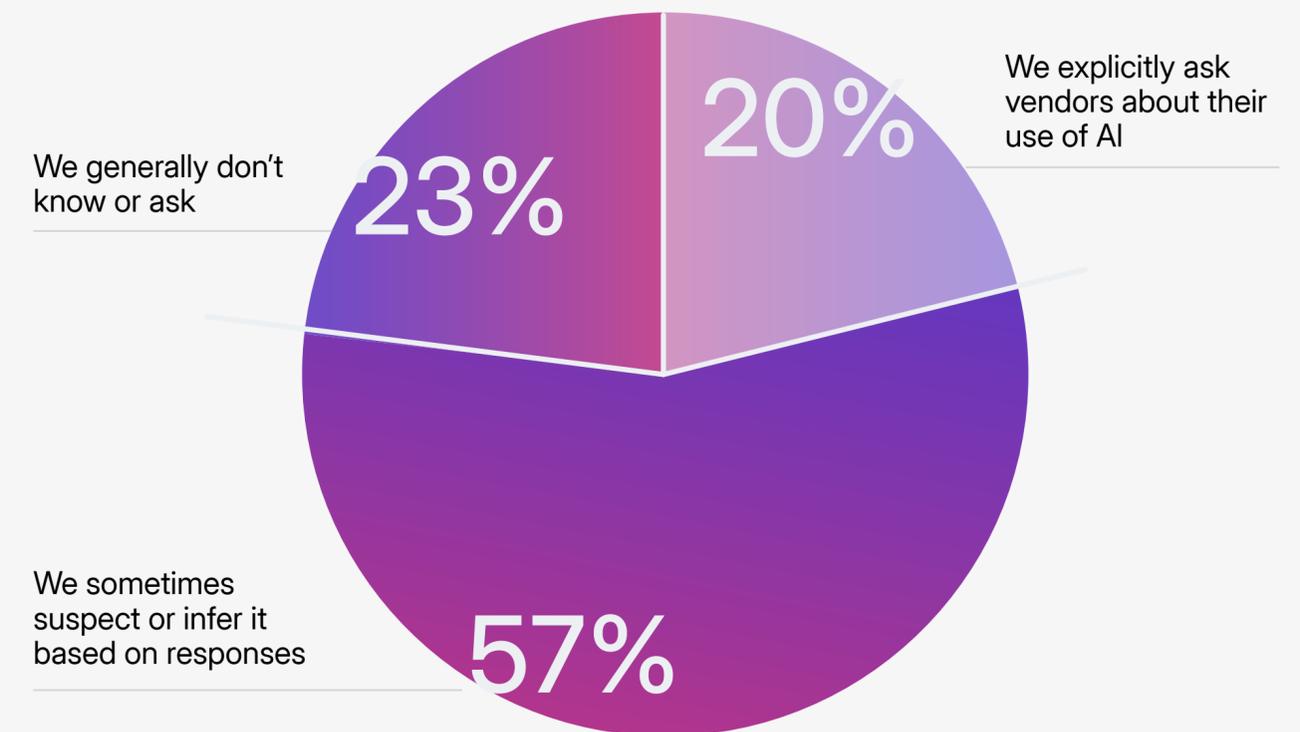
Nearly 1 in 5 buyers (18%) say they're already using AI tools to determine whether vendors rely on AI to draft RFP responses. In **APAC**, that number jumps to 52%. In the **U.S.,** it's just 8%.

Still, clear visibility into vendor-side AI usage remains rare:

- Only 20% of buyers say they explicitly ask vendors about their AI usage

- 57% say they infer it based on tone or content

- 23% don't ask or know at all (in manufacturing, this number rises to 54%)

Do buyers know whether vendors use AI for RFP responses?

Figure 16

We generally don't know or ask — **23%**

We explicitly ask vendors about their use of AI — **20%**

We sometimes suspect or infer it based on responses — **57%**

What buyers think about AI usage

(continued)

When buyers do become aware of AI use, most don't view it negatively. In fact, nearly 1 in 3 say GenAI use makes them more likely to consider a vendor, and automation is seen even more favorably — 42% say it improves perception. Views on agentic AI are similar: 33% see it as a positive signal, but 25% of buyers say it makes them less likely to engage.

Part of that difference may come down to the age of the technology. Automation tools have been around longer, and buyers are nearly three times more likely to view them positively than negatively. Agentic AI, on the other hand, is newer and less proven. Some buyers see its 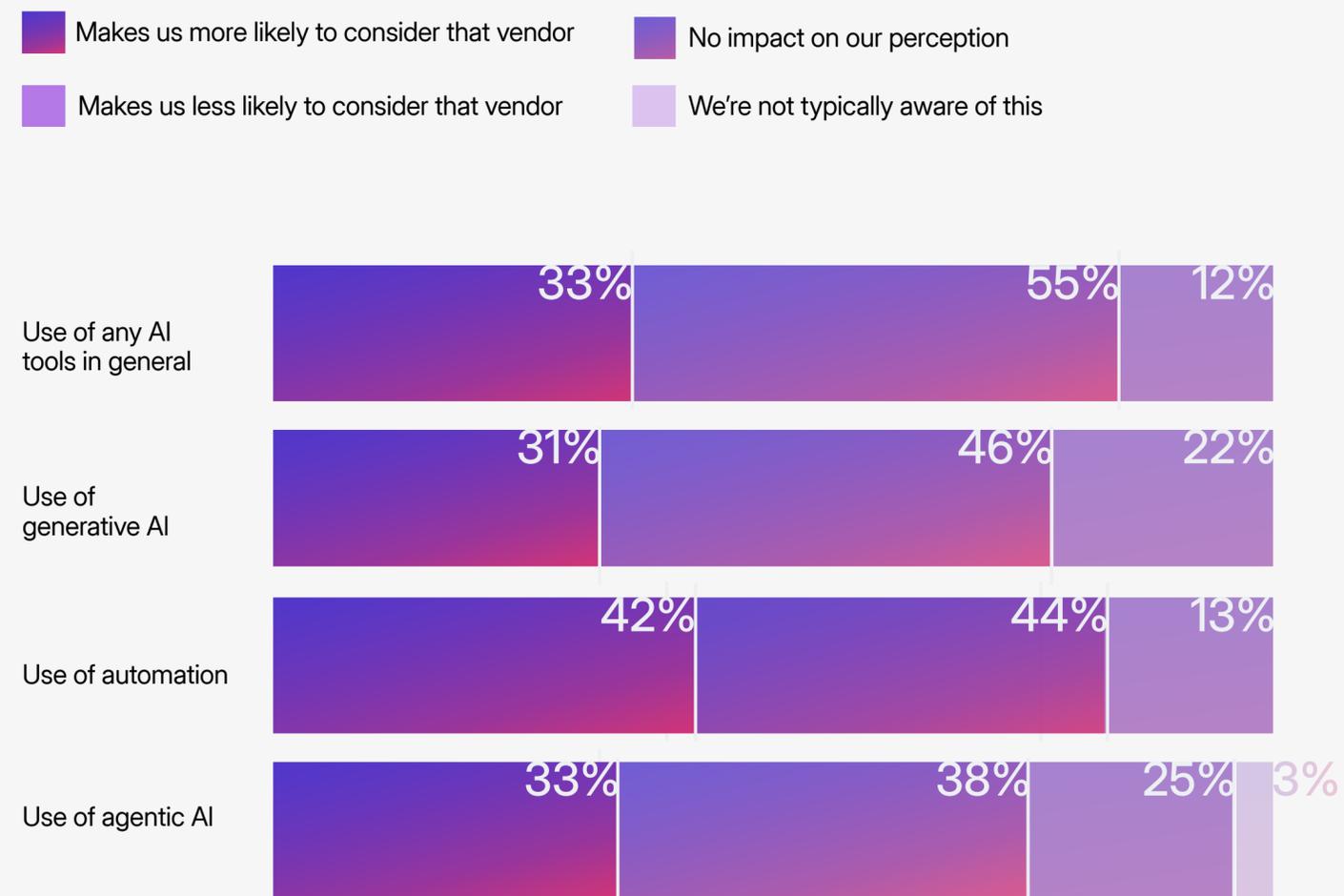potential, but others worry it could signal a lack of oversight or raise concerns about whether vendors are using the technology responsibly.

Still, buyer sentiment around vendor AI use is **largely neutral or positive**. Many buyers interpret it as a sign of maturity — evidence that a vendor is forward-thinking, innovative, and actively adapting to how work gets done today.

That openness comes with expectations. When it comes to high-stakes content like RFPs and information requests, buyers are paying closer attention — and certain red flags are starting to emerge. That's where we turn next to complete the picture.

What buyers think when vendors use AI

Figure 17

Makes us more likely to consider that vendor
No impact on our perception
Makes us less likely to consider that vendor
We're not typically aware of this

Use of any AI tools in general	33%	55%	12%
Use of generative AI	31%	46%	22%
Use of automation	42%	44%	13%
Use of agentic AI	33%	38%	25%	3%

What vendors can do
when buyers notice AI

As buyers become more aware of vendor AI use, clarity and intent matter more than ever.

Make your AI usage transparent.

Some buyers are already analyzing how vendors use AI. Be prepared to explain where and how you use it (and what controls are in place).

Show how AI improves the buyer experience.

Whether it's speeding up response time or improving consistency, connect your AI use to buyer value.

Position agentic AI as progress.

Buyers already understand automation and mostly see it as a positive. Agentic AI is newer, so framing it as an evolution — not a replacement for human oversight — helps reinforce innovation and trust.

Buyer red flags around AI

Buyers are indicating comfort with vendors using AI, but that comfort comes with expectations. When it comes to RFPs or formal information requests, scrutiny sharpens. Buyers want to know that what they're reviewing is accurate, thoughtful, and secure.

The most common concerns about how AI is being used across the buying cycle are how it's managed, reviewed, and aligned to buyer expectations.
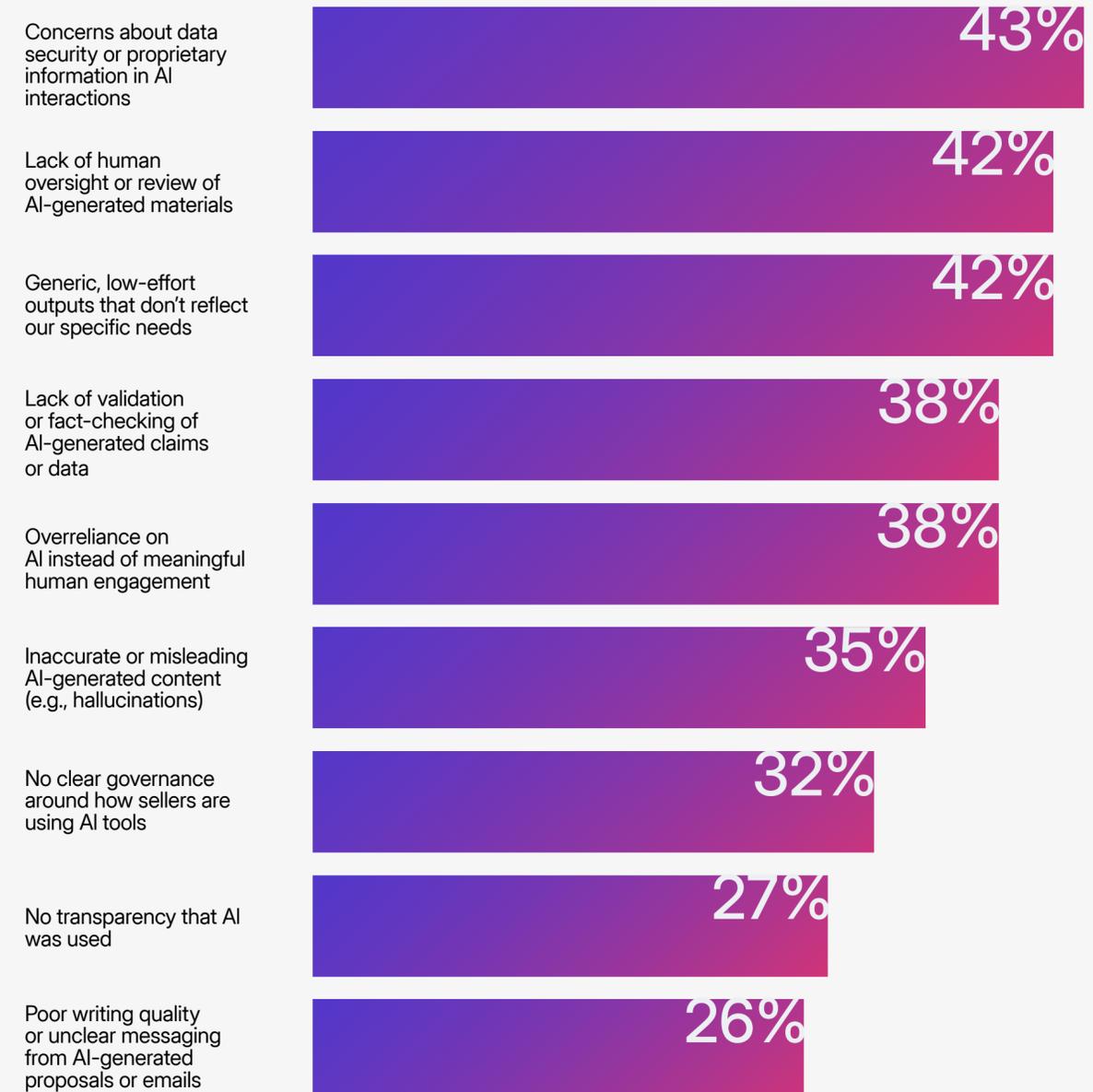
Some concerns are more pronounced depending on who you're selling to:

- In the **UK**, concerns spike across the board. 62% say they're concerned about generic responses, 56% about data security, and 51% about overreliance on AI.

- In **APAC**, 64% of buyers flag lack of human oversight as a major concern — the highest of any region.

- In **manufacturing**, 65% cite data security concerns, and 58% worry about vendors leaning too heavily on AI.

- In **healthcare**, 44% say they're concerned about the absence of clear AI governance.

Buyers don't need vendors to avoid AI, but they need to trust how it's being used. The more regulated or technical the industry, the higher the bar is likely to be.

Buyer concerns about vendor use of AI in responses

Figure 18

Concern	Percentage
Concerns about data security or proprietary information in AI interactions	43%
Lack of human oversight or review of AI-generated materials	42%
Generic, low-effort outputs that don't reflect our specific needs	42%
Lack of validation or fact-checking of AI-generated claims or data	38%
Overreliance on AI instead of meaningful human engagement	38%
Inaccurate or misleading AI-generated content (e.g., hallucinations)	35%
No clear governance around how sellers are using AI tools	32%
No transparency that AI was used	27%
Poor writing quality or unclear messaging from AI-generated proposals or emails	26%

What vendors can do when AI usage is under the microscope

In critical moments, trust is everything, and buyers are paying closer attention to how AI is used behind the scenes.

Anticipate scrutiny in formal materials.

Buyers are most cautious about AI-generated responses to RFPs and other questionnaires. These are moments that demand accuracy, transparency, and human oversight.

Strengthen your content review process.

Ensure all AI-assisted content is fact-checked, reviewed, and aligned to buyer expectations.

Be ready to explain your safeguards.

Buyers may ask how you're managing sensitive data, avoiding generic output, and ensuring AI doesn't replace human judgment. Have clear, credible answers.

Closing the gap between what buyers do and what revenue teams see

Closing the gap between what buyers do and what revenue teams see

This report started with a simple premise: so much of the buying process happens out of sight. Now you've seen what's on the other side — and where you can make your move.

Across stages, B2B buyers are operating in new ways:

• **Buyers set the tone early.** Discovery and shortlisting often happen before first contact. If you're not visible in their go-to channels, you may never be considered.

• **Execution matters as much as fit.** The RFP, the demo, the proof of concept — the work you put in here still shapes most final decisions.

• **Trust travels fast.** As AI plays a bigger role in buying, organizations are watching how vendors use it. Clarity, accuracy, and transparency win confidence.

The shifts we've surfaced here — from AI-driven discovery to governance-heavy evaluation – are rearchitecting the sales process. They influence when buyers engage, how they compare vendors, and what ultimately drives their decisions. For revenue teams, closing the gap means spotting these shifts early and advancing yourself at the moments that matter most.

The "other side" will never be fully visible. But armed with the knowledge of where buyers are spending their time, what they prioritize, and how they make their pick, you can gain a hidden advantage. Show up early, bring substance to every touchpoint, and build the kind of trust that lasts past the deal.

Inside the Buyer's Mind

What Shapes B2B Decisions Today

responsive

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