White Paper

Role and Influence of the Technology Decision-Maker Survey

From search to adviser: How AI is rewriting the B2B tech buying playbook

FOUNDRY
an IDG, Inc. company

Over 16 years of documenting the IT buying process, Foundry's Role & Influence of the Technology Decision-Maker survey has noted few changes in the sources buyers rely upon to inform their decisions. That all changed this year.

While traditional sources like analyst firms, technology periodicals, and vendors remain influential, artificial intelligence is now front and center. A full 81% of the 721 respondents—and 89% at the largest firms—said AI influences their decisions.

These platforms are increasingly shaping how buyers compare, validate, and interact with vendors before a sales conversation begins. Even more specialized tools like contract analysis and in-house AI models are being leveraged by some companies, indicating just how ubiquitous AI is becoming across the buying journey.

Many of these tools are so new that it is difficult to forecast their long-term influence on buying decisions. The most likely outcome is the disintermediation of some traditional sources. For example, generative AI models excel at summarizing large amounts of data to generate recommendations, often without disclosing how they reach their conclusions. This could threaten some traditional sources and diminish the value of their brands. These issues will be figured out in markets and courts for years.

The message for marketers, in the meantime, is that they will need to educate their teams in how AI models work and fine-tune their content strategies to ensure their content is as easily discovered by large language models as search engines.

81%

of all IT leaders surveyed say AI influences their IT purchase decisions.

↑ **91% Millennials**
↑ **94% Gen Z**

AI's influence is discussed in more detail later in this report, but one other AI-related factor—demographics—is worth mentioning here. While 81% of all IT decision-makers (ITDMs) said they use AI to help with purchase decisions, that figure jumps to 91% for Millennials (born between 1981 and 1996) and 94% for Gen Z respondents born after 1996. In contrast, the figure for baby boomers is just 62%. The importance of AI will unquestionably grow with the buying responsibility of these younger groups.

Growing complexity

One thing nearly everyone agrees upon is that the technology buying process is becoming more complex. Two-thirds of decision-makers agreed with that statement this year, up from 61% in 2023.

Another macro trend is the growing influence of business stakeholders in the process. On average, 26 individuals now influence IT purchase decisions, up from 20 in 2022. The average team size climbs to 30 at large organizations (1,000+ employees) compared to 19 at smaller companies.

Buying teams are the largest for complex and mission-critical technologies, such as cloud databases and data analytics (29 and 28, respectively) and lowest for commodity platforms like PCs (18). In most cases, the number of participants splits roughly evenly between IT and line-of-business (LOB) stakeholders.

Over time, the survey has also documented a steady increase in LOB management's involvement at nearly every stage of the purchase process. This year, 31% participated in determining business need, up from 27% in 2023. They were involved in vendor selection decisions 24% of the time, up from 18% in 2023. The most dramatic change is in post-sales engagement, where one-quarter of LOB managers now involve themselves, compared to 14% in 2023.

Participation in purchasing decisions varies by the stages of the process.

26

is the average tech buying team size in 2025.

The rise of the LOB influence:

31%

of LOB managers are involved in determining business needs (↑ **from 27% in 2023**).

24%

are involved in vendor selection (↑ **from 18% in 2023**).

25%

are involved in post-sales engagement (↑ **from 14% in 2023**).

Consistent with previous studies, this year's survey documented heavy involvement by CEOs, CIOs, and IT managers at nearly every stage.

CIOs are the dominant influencers at every stage except determining business needs, where CEOs barely edge them out. Not surprisingly, COOs and CFOs become major factors in the purchase authorization process while technical staff become more involved during the needs requirement and product evaluation stages. CIOs at larger companies are more engaged in authorizing purchases than those in smaller firms by a 43% to 32% margin.

Newer titles like Chief AI Officer and AI Engineer have emerged and show their influence, reflecting the rise of AI-driven considerations. Just over half of IT decision-makers say their organization has added AI-focused positions. Chief AI officers are nearly as involved in determining business needs as LOB managers.

The growing influence of business stakeholders demands that marketers align their messages with strategic business outcomes and not just features and specs. They should also familiarize themselves with the priorities of Chief AI Officers, whose agendas may differ from those of others in technical roles.

Given AI's growing role, it's unsurprising that nearly half of ITDMs say increased automation will accelerate the technology purchase process in the coming year. Other forces driving faster decisions include process changes,

52%

of IT decision-makers say that their organization is adding **AI specific roles** who are increasingly involved in technology purchase decisions.

compliance requirements, leadership changes, and internal skills shortages. The top three factors were consistent across regions and company sizes.

The external factor that accelerates purchases the most is customer requests, cited by 42% of all respondents. Popular features like self-service and mobile apps are undoubtedly factors in this dynamic.

Top 3 internal purchase accelerators

1. Increased automation
2. Process changes
3. Compliance requirements

Other external drivers include entering new markets or product areas (40%) and competitive threats (34%). These indicate that tech investments are increasingly seen as mission-critical, a point marketers shouldn't overlook.

The buying cycle and the trust equation

ITDMs may be accelerating technology purchases, but the trend isn't linear. Nearly half (48%) of desktop/laptop purchases are completed in less than 12 months. Security software, mobile devices, servers, and IT services also have some of the shortest buying cycles.

The decision process lengthens as the technologies become more complex. For example, only 26% of ITDMs spend less than a year researching edge computing or internet of things products. Mission-critical technologies like software and data analytics often involve significant integration efforts and are much more likely to take longer than a year to purchase.

79%

of ITDMs are more likely to engage with content from trusted brands (↑ **from 65% in 2023**).

With AI fueling a surge in startup funding, buyers put a premium on working with vendors they can trust. Nearly four in five (79%) ITDMs say they are more likely to engage with content from trusted brands, up from 76% in 2022 and 65% in 2023. Nearly two-thirds (65%) work directly with vendors to shape the business case for their investment. IT suppliers that can achieve that intimacy with their customers are well-positioned to reap years of benefits.

The growing influence of vendor content on buyer decisions has been a Role & Influence research theme for several years. Vendors can maximize their role by engaging early to help organizations clarify their goals and understand available solutions. By offering guidance and support from the outset and by listening carefully to what buyers are trying to achieve, vendors can make the overall experience more efficient and collaborative.

Conventional wisdom has long been that IT buyers discount the value of vendor content, but the research belies that assumption. The responses were surprisingly consistent when buyers were asked what factors matter most in content provided by independent and vendor sources. Credibility (40%) and clarity (38%) are seen as the most useful attributes of both sources. Regardless of the source, relevance, brand reputation, and searchability also rate highly.

When working with vendors, ITDMs prefer electronic communications like phone and video conferences over in-person meetings by a slight margin (76% to 67%). A strong 61% said they engage with vendor websites, indicating that investing in online presence is a good marketing tactic.

Respondents at smaller companies favor vendor websites by a 69% to 53% margin

70%

say that when all stakeholders are aware of a brand, it makes the internal sell process easier.

and phone/email/videoconference by an 82% to 73% margin compared to large companies. Enterprise buyers prefer in-person meetings by 74% to 59%.

There are also regional differences: 84% of North American respondents favor electronic meetings compared to 69% in APAC and 67% in EMEA. Just 40% of APAC respondents engage with vendors through websites, compared to 70% in North America. EMEA respondents are somewhat more likely to engage over social networks.

There's a powerful message here for marketers: Buyers discriminate little between sources of information as long as they believe the information is trustworthy. Clear, credible and easy-to-navigate content is valuable no matter the source. A strong brand reputation enhances this value, especially early in the buying journey.

Trust builds brand reputation, which burnishes credibility. Seven in 10 buyers say it's easier to sell their decisions when all stakeholders are familiar with a brand. Everyone in the process benefits from content that simplifies increasingly complex buying decisions and provides clear customer value.

Why decisions stall

The past three studies have asked when the buying process will most likely stall, and the responses have been consistent. Nearly 40% of decisions are hung up in the business needs determination, technical requirements determination and product evaluation stages. Holdups are less likely when selecting vendors or selling internally. A significant 44% of buyers seek vendor assistance when determining technical requirements or evaluating products, far more than the 26% who do so when selecting vendors or the 19% when selling internally.

44%

of buyers need vendor help when evaluating products or defining technical requirements.

Respondents at large companies said the process was more likely to stall at every stage than those at small companies. EMEA executives see processes stall when determining business needs, evaluating products and authorizing purchase stages somewhat more than their counterparts in other geographies.

The number one factor that causes buying decisions to stall is skills shortages, noted by 44% of respondents. Governance/compliance requirements, leadership changes, process changes, and reorganizations are well behind in the 30% range. Barriers were nearly the same regardless of company size or region. Notably, all of those roadblocks, except governance, are skills-related. This points to an opportunity for technology vendors that can offer skills development as part of their product packages.

The top external events that block tech purchase decisions are government regulations and market/economic changes (both cited by 34%), followed by environmental, social, and governance issues (23%), and competitive threats (22%). North American respondents cited market/economic conditions by a 34% to 27% margin over those in EMEA. Recent uncertainty around tariffs and trade disputes is probably a factor.

Buyers seek between three and four sources to inform their decisions at each stage of the process, except the product evaluation phase, where that figure jumps to 4.3. This highlights the importance of aids like feature comparisons, cost calculators, and ROI studies during this crucial decision.

Downloaded content is a major factor in the research process, and buyers rely more on it than ever. The average number of items downloaded surged from six to seven in 2024 and remained at 6.9 this year. The mean number of assets consumed is 5.3 at small companies and 8.1 at large ones. In APAC, the mean is 7.1, but just 6.3 in EMEA.

Research reports surged to the top of the list of most-used information sources this year, with 70% of respondents saying they find them valuable. That's up from the 45% who mentioned white papers in 2022 and 37% in 2023. It should be noted that the question was asked somewhat differently this year, with "research" replacing "white papers" as an option. Technology content sites placed second with 57% of buyers rating them valuable, while vendors were a close third at 49%.

These findings highlight the value of educational content in marketing. Content from research firms and tech media is seen as especially credible, reinforcing the idea that partnering with trusted third parties can yield the greatest return.

Research rules the funnel

70%

of ITDMs say research reports are the most useful information source throughout their decision process.

The next generation

Foundry's Role & Influence study began providing generational breakdowns of survey data in 2022 and has documented some contrasts in preferences and processes since then.

The Gen Z cohort, born between 1997 and 2012, is less likely to rely on traditional information sources like technology content sites, vendors and analyst firms than their older peers. For example, just 27% of Gen Z respondents in this year's study said vendors are an effective source of information compared to 52% of baby boomers and 57% of the Gen X group born between 1965 and 1980.

The value of peers as information sources also declines steadily with age, from 45% among boomers to 31% for Gen Z buyers. Conversely, the youngest buyers are considerably more likely to trust social media by a nearly three-to-one margin (44% to 16%) over boomers. In other areas, disparities aren't as evident. Trust in analyst firms, business content sites, events and print publications is relatively even across the age spectrum.

The takeaway for marketers is that social media platforms are a critical channel through which to reach the youngest

Social media is a critical way to reach younger tech buyers

16%
→ Baby Boomers

24%
→ Generation X

42%
→ Millennials

44%
→ Generation Z

buyers. While their preferences may change with age, a more likely scenario is that habits established early in life will carry forward into the future, making TikTok and Instagram as critical to reaching IT buyers as traditional technology media.

Needs change during the buying process

A core feature of the Role & Influence research for many years has been the breakdown of information sources used at each stage. This data reveals how needs change as buyers move deeper in the funnel.

This year, research topped the list in each of the seven stages of the buying journey. Because this is the first time research was offered as a single, consolidated category in the survey, the best comparison to previous studies is white papers, which have always figured strongly in early-funnel stages but less prominently when selling internally and approving the purchase.

The dominance of research at every stage reflects the increasingly complex technology landscape and dovetails with the larger number of downloaded assets buyers are consuming compared to previous years. Both custom and third-party research have value, so marketers who invest in data-backed thought leadership are well-positioned to influence buyers throughout the process.

This year's study reaffirms the continued ascendance of vendors as information sources, a trend evident in several past studies. Vendors were cited as the number two most valued information source in the final five stages of the buying process this year, consistent with their performance in 2022 and 2023.

Technology content sites also figure strongly in buying decisions at every stage. Analyst firms are most useful in determining business needs, selecting vendors, and gaining purchase approval.

Peers figure prominently at nearly every stage, especially recommending vendors and post-sales insights, highlighting the value of customer advocacy, reviews, and case studies to buyer education.

The fact that buyers rely on so many sources when making decisions is a message to marketers that they need a multi-channel content strategy that maps to all stages, from awareness and trust-building research to peer-based validation and analyst engagement at decision time.

AI's Impact

This year's survey was the first to incorporate an extensive line of questioning about the impact of AI on IT decisions. Coming just a little more than two years after ChatGPT burst on the scene, the scope of AI adoption is impressive. An overwhelming 92% say AI has had at least some impact on their IT purchase decisions.

Most helpful information sources during the tech purchase process:

1. Research
2. Tech content sites
3. Vendors
4. Analyst firms
5. Peers

92%

of ITDMs say AI has had at least some impact on the IT purchase process at their organization.

Despite this enthusiasm, most ITDMs keep a human tightly in the loop; just 15% say they rely heavily on AI for product research and recommendations. A much larger segment—43%—use it for insights to inform a process that is still primarily human-led. A smaller 23% use it tactically for tasks like vendor comparisons. Notably, only 19% report no AI involvement at all.

Eighteen percent of buyers at large companies report relying heavily on AI, compared to 10% at small ones. They're also more likely to leverage AI insights but keep the decisions human-led by 49% to 36%. Just under 30% of small companies report no AI involvement compared to 11% of large ones.

Generative AI is the most used tool, with 44% of ITDMs employing it and 55% in the APAC region. There are many types of artificial intelligence beyond generative AI, though, and buyers are using them all. A significant 36% use chatbots, 36%

predictive analytics platforms, 35% AI-powered market research tools, and 34% AI-driven vendor comparison platforms.

The impact of AI is both broad and deep. Just under 40% of respondents said it accelerates the vendor evaluation and vetting process, and 38% use it for product recommendations. More than 30% automate proposal requests, assist with demos, and improve budgeting and ROI measurement.

Nearly 1/2 of ITDMS say AI plays a key role in evaluating products and services.

There were significant generational divergences on the AI question. Unsurprisingly, younger buyers are more comfortable with machine-generated recommendations than older ones. For example, 94% of Gen Z respondents use AI compared to 62% of baby boomers. The youngest respondents are nearly three times as likely as the oldest ones to say they rely heavily on AI for research and recommendations (24% to 9%). Just 6% of Gen Z buyers reported no AI involvement compared to 30% of baby boomers.

AI is more likely to be enlisted early in the buying process; 48% use it to evaluate products and services, and 46% to determine technical requirements. AI use drops sharply to 15% in the "sell internally" and "authorize or approve" stages.

Becoming AI-friendly

While technology marketers can't influence AI recommendations directly, they can take steps to ensure positive content about their company and products is easy to discover:

- Use structured metadata to describe products clearly.
- Create machine-readable content using standards like Schema.org to help AI-powered recommendation engines extract meaning from web content easily.
- Publish clear, detailed product descriptions and comparisons.
- Encourage customer reviews and testimonials.
- Ensure products are well-documented in industry forums like GitHub and Stack Overflow.
- Share structured data with platforms used in procurement.
- Generate thought leadership content for the early stages of the buying process and tactical tools like comparison guides and ROI calculators for the recommendation and decision stages.

None of these recommendations should come as news to marketers skilled in content marketing. Many practices enabling search engines to identify quality content are just as appropriate in AI model training. Whether a human or machine is doing the research, making information easily discoverable and decipherable is critical to getting your brand in front of the people you want to reach.

Conclusion

The 2025 Role & Influence depicts a technology buying landscape in transition. The complexity of the purchase process continues to grow, with more stakeholders involved, longer buying cycles for advanced technologies, and greater dependence on diverse information sources. At the same time, buyers are increasingly turning to AI tools to support research, comparisons, and decisions, particularly in the early stages of the journey.

Trust remains the most valuable currency, with decision-makers favoring credible, clear, and relevant content, regardless of whether it comes from a vendor, analyst, or peer. This creates a stronger case than ever for marketers to deliver high-quality, data-backed materials supporting every decision-making phase.

Generational and regional differences are shaping the future of B2B technology buying. Gen Z's preference for social media and comfort with AI-generated insights signal a shift that will only accelerate as this cohort grows in influence. Meanwhile, regional variations in AI adoption suggest that a one-size-fits-all marketing strategy may be ineffective. The overarching message for marketers is clear: success will depend on meeting buyers where they are, whether that means optimizing content for AI engines, tailoring messaging by region or age group, or building brand trust through transparency and thought leadership.

About the survey

Foundry's 2025 Role and Influence of the Technology Decision-Maker survey was conducted online among the audiences of Foundry's B2B brands (CIO, Computerworld, CSO, InfoWorld, and Network World) representing IT decision-makers involved in the technology purchase process for their organization. Results in this survey are based on 721 respondents, all involved in the purchase process for major IT or security products and services, to the 31-question survey across multiple industries and countries.

Key global differences

For many survey questions, IT leaders report similar results across all three regions surveyed. However, a few key points of difference stick out.

North America

5.9 months is the average length of the buying cycle for IT decision-makers in North America.

- **26** is the average number of people **involved in the IT purchase process**.
- ITDMs in North America say that over the past 12 months, CIOs, CEOs, IT networking staff and managers have **become more involved** in the purchase process.
- In North America, the IT purchase process is **likely to stall in the earlier stages**:
  - Determining technical requirements (39%).
- Economic uncertainty is a **top barrier** to the purchase process in this region.
- **6.9** is the **average number of assets** (i.e., white papers, webcasts, research reports, project briefs) that **ITDMs in North America download** (i.e., share contact information to gain access) when researching throughout the purchase process.
- Tech buyers in NA rely on **various information sources** to make a purchase decision:
  1. Research reports
  2. Technology content sites
  3. Vendor interactions
- In North America, AI usage is solid but not extreme, with **generative AI and vendor comparison tools** among the most adopted.
- Trust is paramount in this region—**83%** say they prefer content from brands they recognize and trust.

EMEA

5.2 months is the average length of the buying cycle for IT decision-makers in the EMEA region. This is the shortest of the three regions, but still a long and complex process.

- **25** is the average number of people **involved in the IT purchase process**.
- ITDMs in EMEA say that over the past 12 months, CIOs, security management, and CTOs have **become more involved** in the purchase process.
- In EMEA, the IT purchase process is **most likely to stall** when:
  - Determining business needs
  - Evaluating products
  - Authorizing purchase
- **Common barriers** in the region—compliance and governance requirements
- **6.3** is the **average number of assets** (i.e., white papers, webcasts, research reports, project briefs) that **ITDMs in EMEA download** (i.e., share contact information to gain access) when researching throughout the purchase process.
- Tech buyers in EMEA rely on various **information sources** to make a purchase decision:
  1. Research reports
  2. Technology content sites
  3. Vendor interactions
- AI usage is the highest among all 3 regions with IT decision-makers in EMEA using **generative AI and virtual assistants**.
- Trust is paramount in EMEA—**79%** say they prefer content from brands they recognize and trust.

APAC

7 months is the average length of the buying cycle for IT decision-makers in the APAC region, the longest of the 3 regions. In fact, **28%** of APAC ITDMs say that the entire process takes **12 months**.

- **24** is the average number of people **involved in the IT purchase process**.
- ITDMs in APAC say that over the past 12 months, CIOs, CTOs, CISOs and CEOs have **become more involved** in the purchase process.
- In APAC, the IT purchase process is **most likely to stall during technical requirement determination**, cited by nearly **43%**— the highest across all regions.
- **Common barriers** include, skills shortages and customer-driven complexity
- **7.1** is the **average number of content** (i.e., white papers, webcasts, research reports, project briefs) that **ITDMs in APAC download** (i.e., share contact information to gain access) when researching throughout the purchase process.
- Tech buyers in APAC rely on various **information sources** to make a purchase decision:

  1. Research reports
  2. Technology content sites
  3. Vendor interactions

- In APAC, 55% of ITDMs say they leverage **generative AI tools** to aid them in the IT purchase process, compared to 38% of NA and 43% of EMEA.
- Trust is paramount in APAC— **72%** say they prefer content from brands they recognize and trust.

Examining the marketplace

Research is an invaluable way for marketers to better understand customers and prospects, with the goal of building quality connections. At Foundry this is one way we are focused on building bridges between tech buyers and sellers. Our first-party relationships with the most important tech buyers and influencers around the world, allows us to apply value across our customers marketing stack. Our research portfolio explores our audiences' perspectives and challenges around specific technologies—from analytics and cloud, to IoT and security—and examines the changing roles within the IT purchase process, arming tech marketers with the information they need to identify opportunities.

To see what research is available, visit foundryco.com/tools-for-marketers. For a presentation of full results from any of these studies, contact your Foundry sales executive or go to foundryco.com/contact-us.

Buying process

Each year we take a deep dive into the enterprise IT purchase process to learn more about who is involved and who influences decision-making, what sources purchasers rely on to keep up to date with technology—and throughout the purchase process—and how they want to engage with the vendors they are working with. Visit foundryco.com/customerjourney for more information.

Buying process studies

- Customer Engagement
- Role and Influence of the Technology Decision-Maker

Technology insights

Each year we explore the technologies that are top of mind among our audiences to understand the business challenges, drivers, and adoption within the enterprise. These research studies are designed to help IT marketers understand what their customers are focused on and where the market is moving.

Role and priority studies

- CIO Tech Poll: Tech Priorities
- State of the CIO

Technology-specific studies

- AI Priorities
- Cloud Computing
- Security Priorities
- Partner Marketing

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About Foundry

Foundry's vision is to make the world a better place by enabling the right use of technology, because we believe that the right use of technology can be a powerful force for good.

Foundry (an IDG, Inc. company) is a trusted and dependable editorial voice, creating quality content to generate knowledge, engagement and deep relationships with our community of the most influential technology and security decision-makers. Our premium media brands, including CIO®, Computerworld®, CSO®, InfoWorld®, Macworld®, Network World®, PCWorld® and Tech Hive®, engage a quality audience of the most powerful technology buyers with essential guidance on the evolving technology landscape.

Our trusted brands inform our global data intelligence platform to identify and activate purchasing intent, powering our clients' success. Our marketing services create custom content with marketing impact across video, mobile, social and digital. We simplify complex campaigns that fulfill marketers' global ambitions seamlessly, with consistency that delivers quality results and wins awards. Additional information about Foundry is available at foundryco.com.