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Tech Buying: Key Factors in Purchasing Decisions in Security, 2025

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27 March 2025

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27 March 2025 - ID G00825723 - 7 min read

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Initiatives:Technology Buying Dynamics

Tech providers hold many misconceptions regarding what matters most to prospective security buyers. This research helps product leaders become more effective at influencing buyers and getting on new opportunity shortlists by guiding business case development and removing buyer internal barriers.

Overview

Key Findings

- Value assessment tools and business-case-related content are the most utilized content types as part of a purchase decision.
- 79% of organizations are linking security metrics into business performance. Seventy-three percent are setting business outcomes targets to inform selection criteria, while 24% are setting only technical KPIs.
- Expert opinions and third-party content are top factors for purchasing decisions.
- Missing functionality, pricing misalignment and lack of clear differentiation are top reasons security buyers stop considering providers.

Data Insights

Introduction

When providers' security products aren't considered by buying organizations, product leaders find themselves asking: What are chief information security officers (CISOs) and security teams looking for? Tech buying behavior survey results show that buyers' priorities and the security landscape are changing:

- Buying security is increasingly becoming a business decision, not only a technology decision.

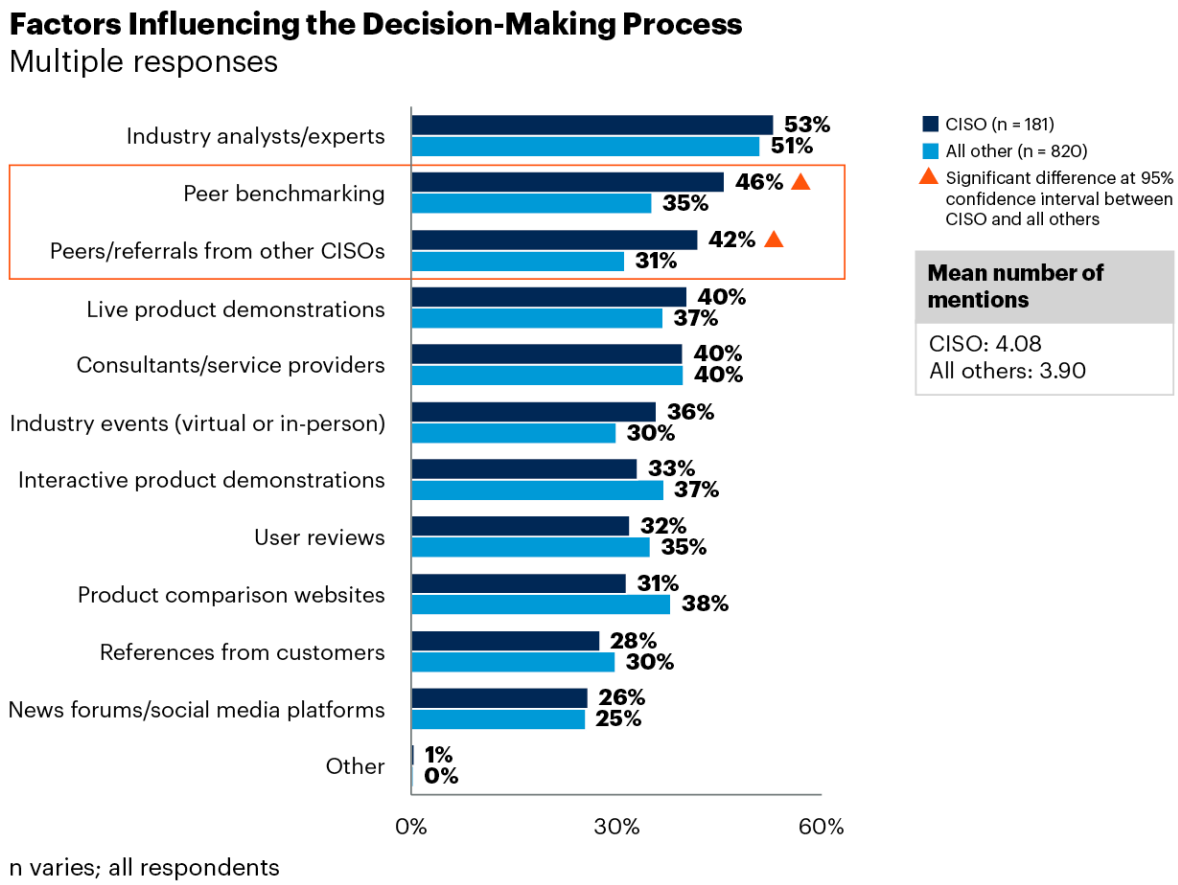
- The increase in adoption of generative AI (GenAI) is a top concern for security buyers and a top budget priority for organizations of all sizes. [1]

It is critical to understand how security buyers approach security purchases and how product leaders can gain their attention and trust to win their business. Product leaders must address security organizations' priorities and remove internal barriers, including concerns about high total cost of ownership (TCO), productivity and ROI, to ensure their products are considered.

Expert Opinions and Third-Party Content Are Top Factors

Industry analysts are the most influential factor in the buying decision, followed by peer benchmarking (see Figure 1). Notably, social media and news forums are not as impactful on security buyers.

Figure 1: Factors Influencing the Decision-Making Process



n varies; all respondents

Q: Which of the following factors influenced the decision-making process of your organization's most recent purchase?

Source: 2024 Gartner Security Buying Behavior Survey

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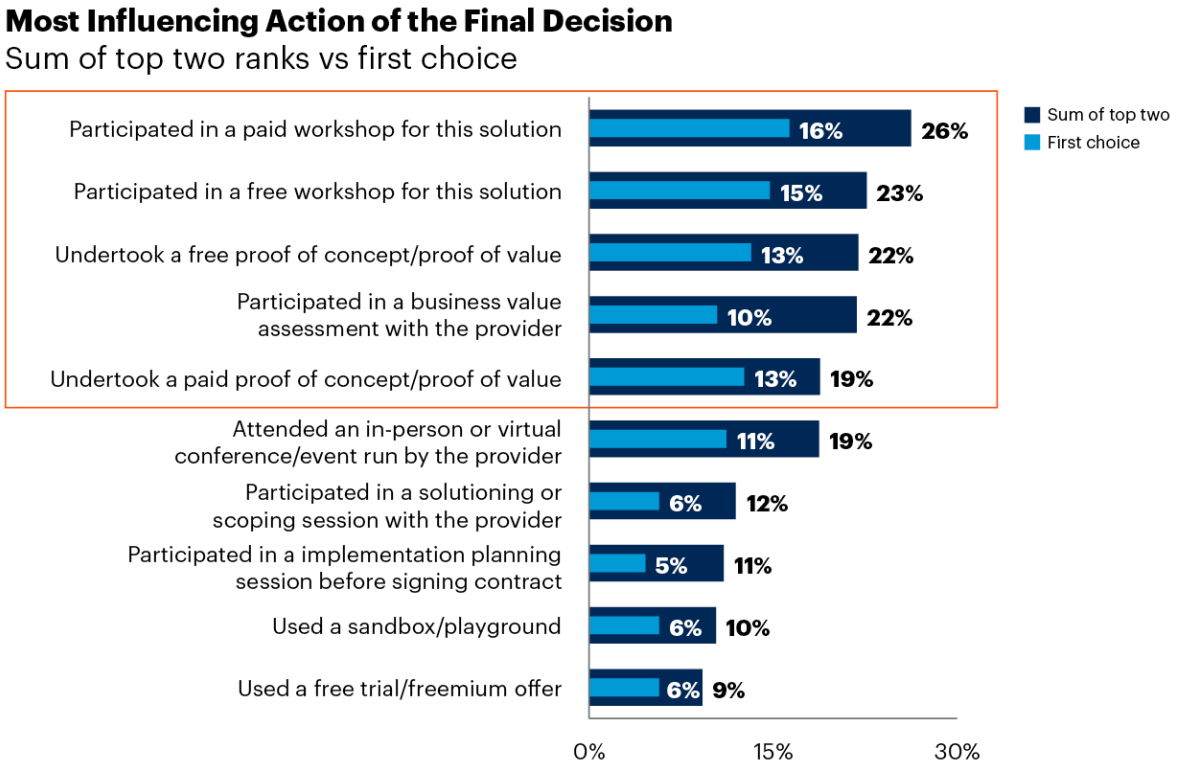
Product leaders should also note that workshop/ideation sessions and proofs of concept (POCs) are the most influential factor in the final decision process. Additionally, both paid and free POCs have about similar impact, with free at 3% more (see Figure 2).

Figure 2: Most Influencing Action of the Final Decision



n = 902; respondents who took two or more actions considering organization's most recent purchase, excluding "don't know"

Q: Of the actions you or someone else in the buying team took during your most recent purchase, which two were the most influential factors in your final decision/which of two was more influential in your final decision?

Source: 2024 Gartner Security Buying Behavior Survey

Note: Axis labels are shortened from original survey wording.

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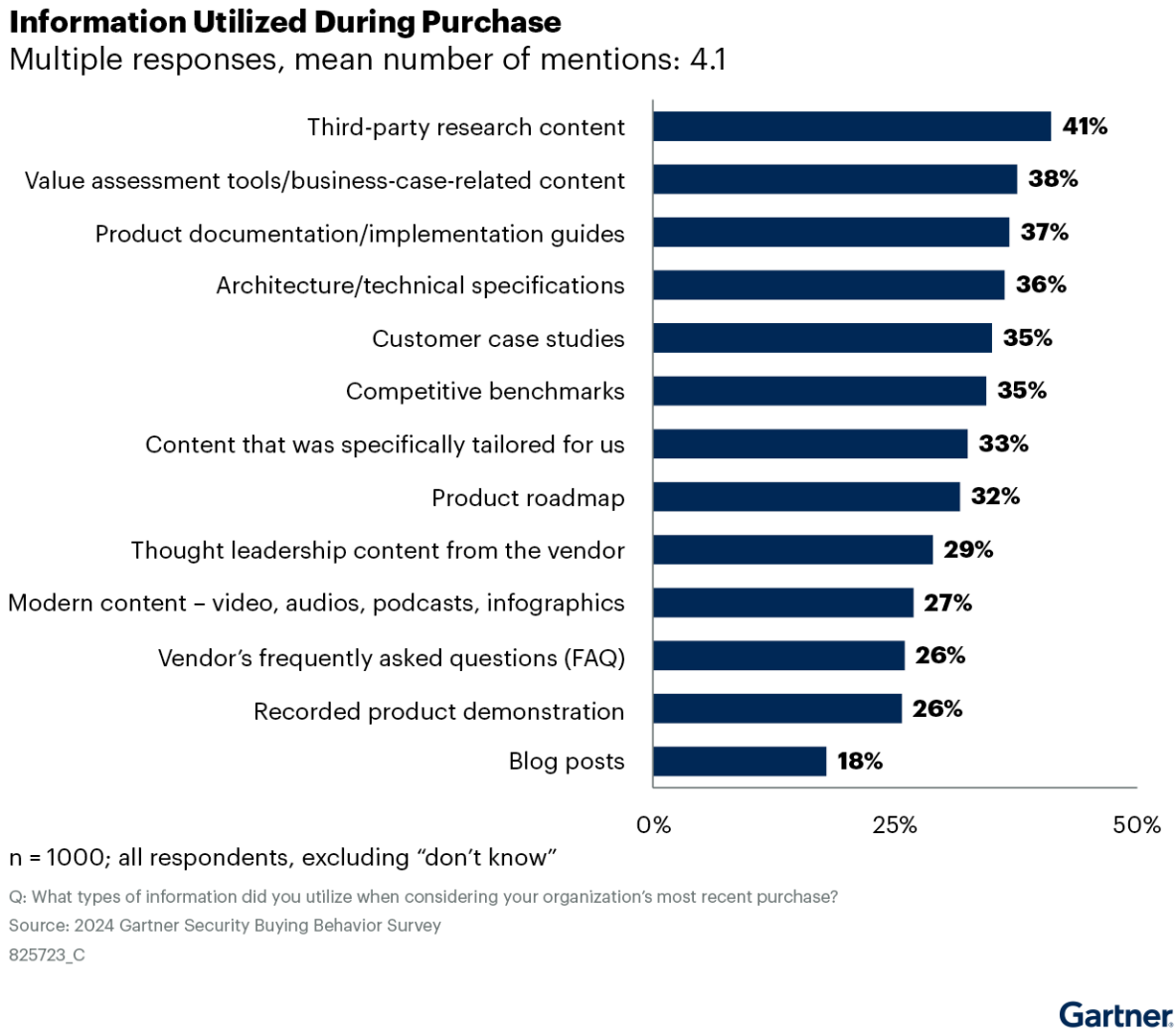
Figure 3 shows third-party research content is the most utilized type of information in recent purchasing decisions, while recorded product demos and blog posts are the least.

Figure 3: Information Utilized During Purchase



Recommendations

- Demonstrate expertise and industry knowledge while orchestrating plans for top influential factors.
- Target top influential factors during the business-case-development and POC process.
- Prioritize analyst/advisory programs (see Analyst Relations Best Practices Primer for 2025). Buyers value expertise and objectivity.
- Prioritize direct personalized engagements and tailored content. Invest in POC strategy and develop ideation sessions with buyers (can be as paid activities).

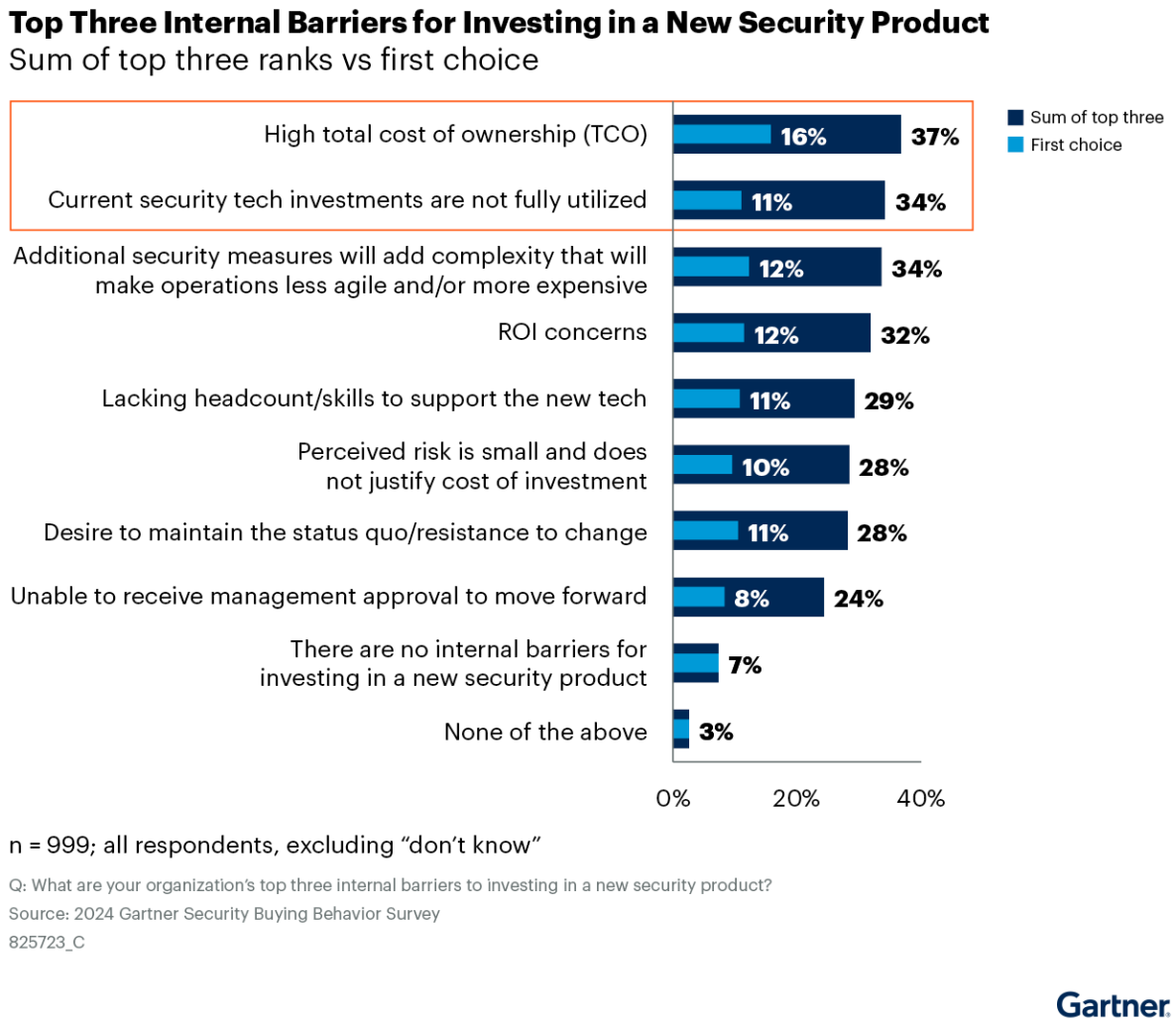
- Conduct live product demonstrations and invest in your demo strategy. Explore the opportunities for interactive demos (see How to Maximize Buyer Journey Impact With Interactive Demos).
- Expand content by leveraging third-party research that can highlight your product offerings objectively (see Use Third Parties to Improve B2B Customer Journeys).

Top Buyer Internal Barriers Are High TCO and Underutilized Investments

As part of a purchase decision, tools that can assess the value of the product (such as TCO and ROI calculators) and business-case-related content are the most utilized. Product leaders must showcase the product's impact and alignment to the organization's core business goals. For example, products that can provide dashboards will help CISOs in their strategy development and to measure the improvement of their security posture on specific activities. Additionally, products should help organizations comply with new regulations such as the Cyber Resilience Act (CRA) or NIS2 and other regulations that would be of interest to the business.

As highlighted in the survey results below (Figure 4), the top internal barriers are high TCO, underutilized security tech investments, product complexity and ROI concerns.

Figure 4: Top Three Internal Barriers for Investing in a New Security Product



n = 999; all respondents, excluding "don't know"

Q: What are your organization's top three internal barriers to investing in a new security product?

Source: 2024 Gartner Security Buying Behavior Survey

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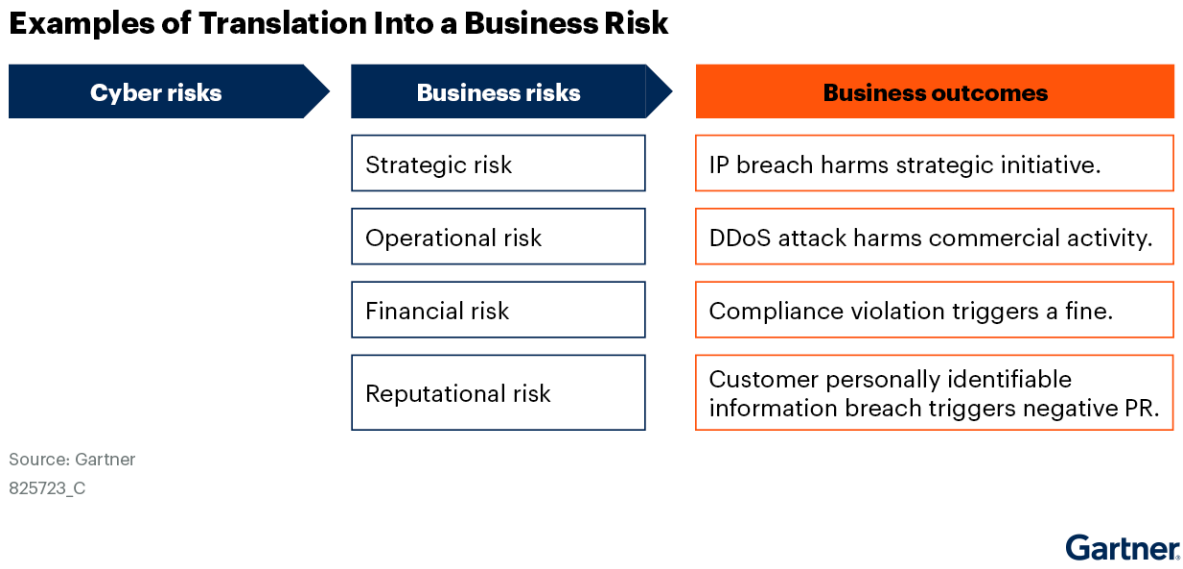
Recommendations

Product leaders should help buyers develop the business case and remove internal barriers by integrating ROI and TCO calculators as part of the buying journey. Integrate quantified outcomes and business values to your product's messaging by measuring the business value derived from security following these three steps:

- Measure the protection-level outcomes associated with your offering for each stakeholder/discipline in the security program. See Tool: Catalog of Business-Aligned Outcome-Driven Metrics for Risk and Security for inspiration and examples.
- Providers should build tools that help the customer quantify the total cost and compare to the quantitative and qualitative benefits (operational, financial, risk).

- Translate the cyber risk into a business risk by relating to one or more of these risk categories: strategic risk, operational risk, reputational risk or financial risk. See Figure 5 for examples.

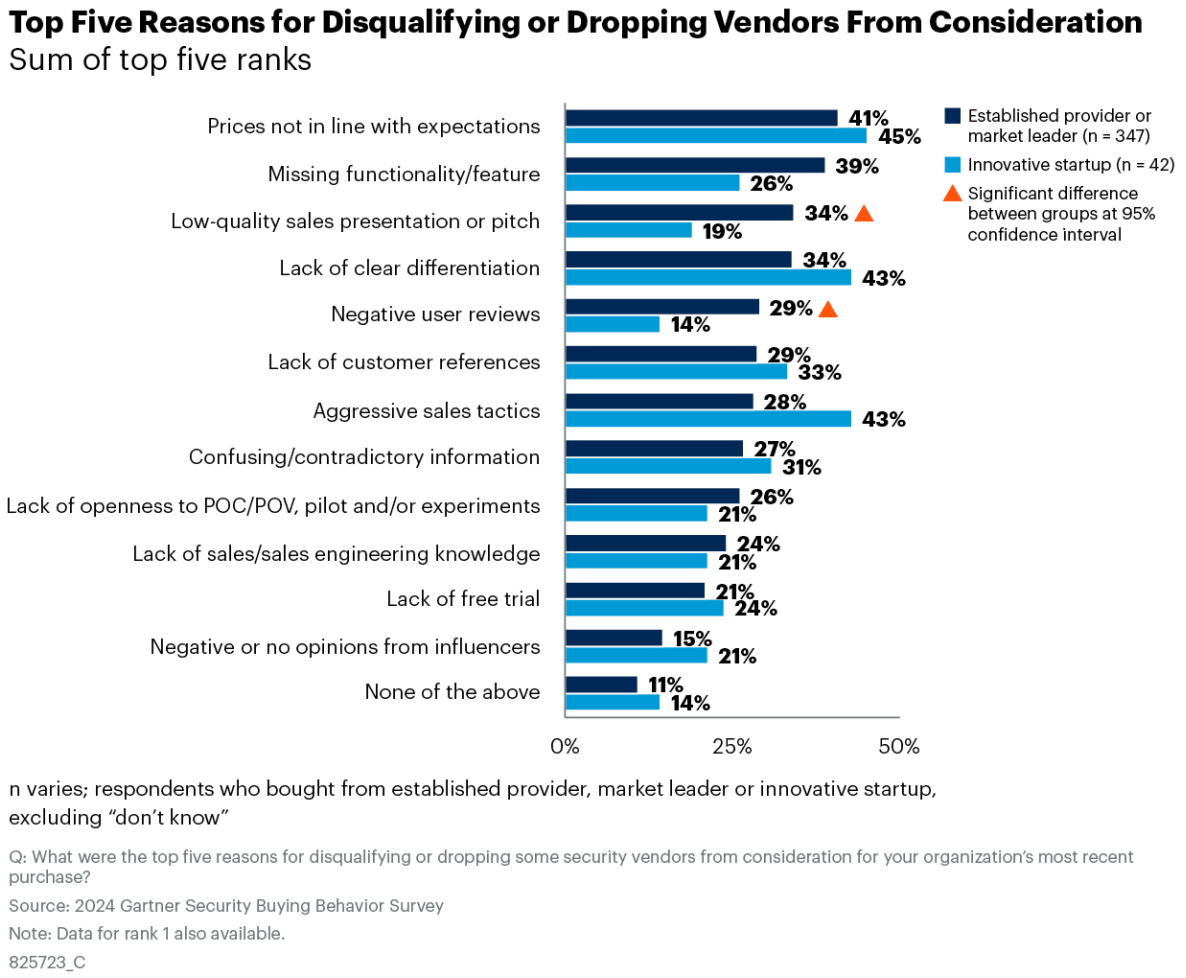
Figure 5: Examples of Translation Into a Business Risk



Buyers Drop Providers From Consideration for Three Main Reasons

For established providers and market leaders, prices that are not in line with expectation (41%) is the top reason for disqualification. Meanwhile, product completeness (39%) plays a major role when disqualifying solutions. Followed by low quality sales pitch and lack of clear differentiation (both at 34%). Additionally, there are interesting differences between established providers and startups. Pricing, differentiation and sales tactics are more important to startups as reasons for disqualification (see Figure 6).

Figure 6: Top Five Reasons for Disqualifying or Dropping Vendors From Consideration



n varies; respondents who bought from established provider, market leader or innovative startup, excluding "don't know"

Q: What were the top five reasons for disqualifying or dropping some security vendors from consideration for your organization's most recent purchase?

Source: 2024 Gartner Security Buying Behavior Survey

Note: Data for rank 1 also available.

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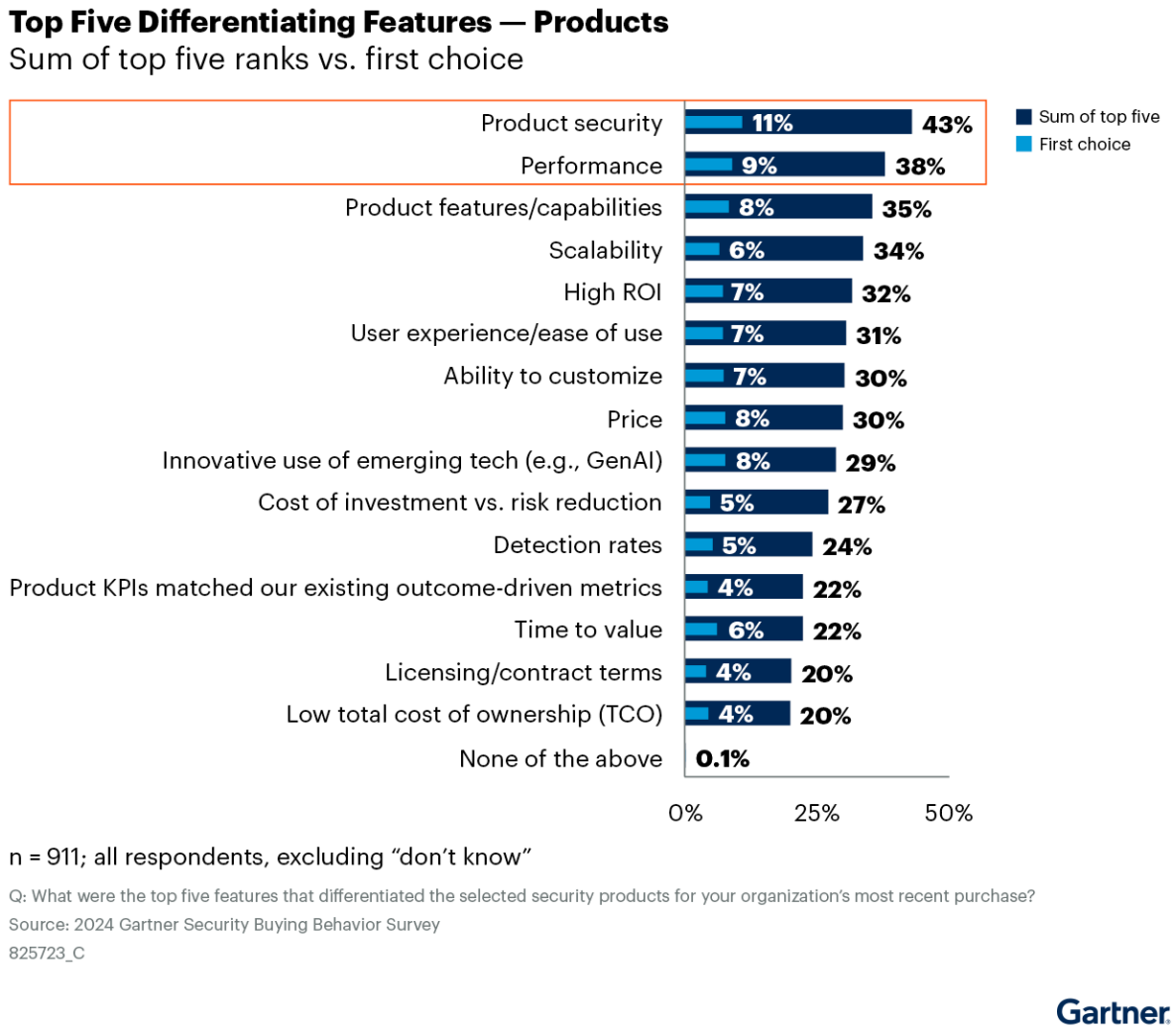
Year-over-year lack of product differentiation continues to keep providers of all sizes and security categories from making buyers' shortlists. Products are differentiated by their product security level, performance, functionality and scale. Notably, detection rate was ranked relatively low at 24%, and buyers are also tolerant of longer time to value, at 22%. Additionally, it should be noted that just saying that a product has GenAI does not mean it would be differentiated. This functionality clearly needs to address a pain point or show business value benefits with clear metrics (see Figure 7).

Figure 7: Top Five Differentiating Features — Products



n = 911; all respondents, excluding "don't know"

Q: What were the top five features that differentiated the selected security products for your organization's most recent purchase?

Source: 2024 Gartner Security Buying Behavior Survey

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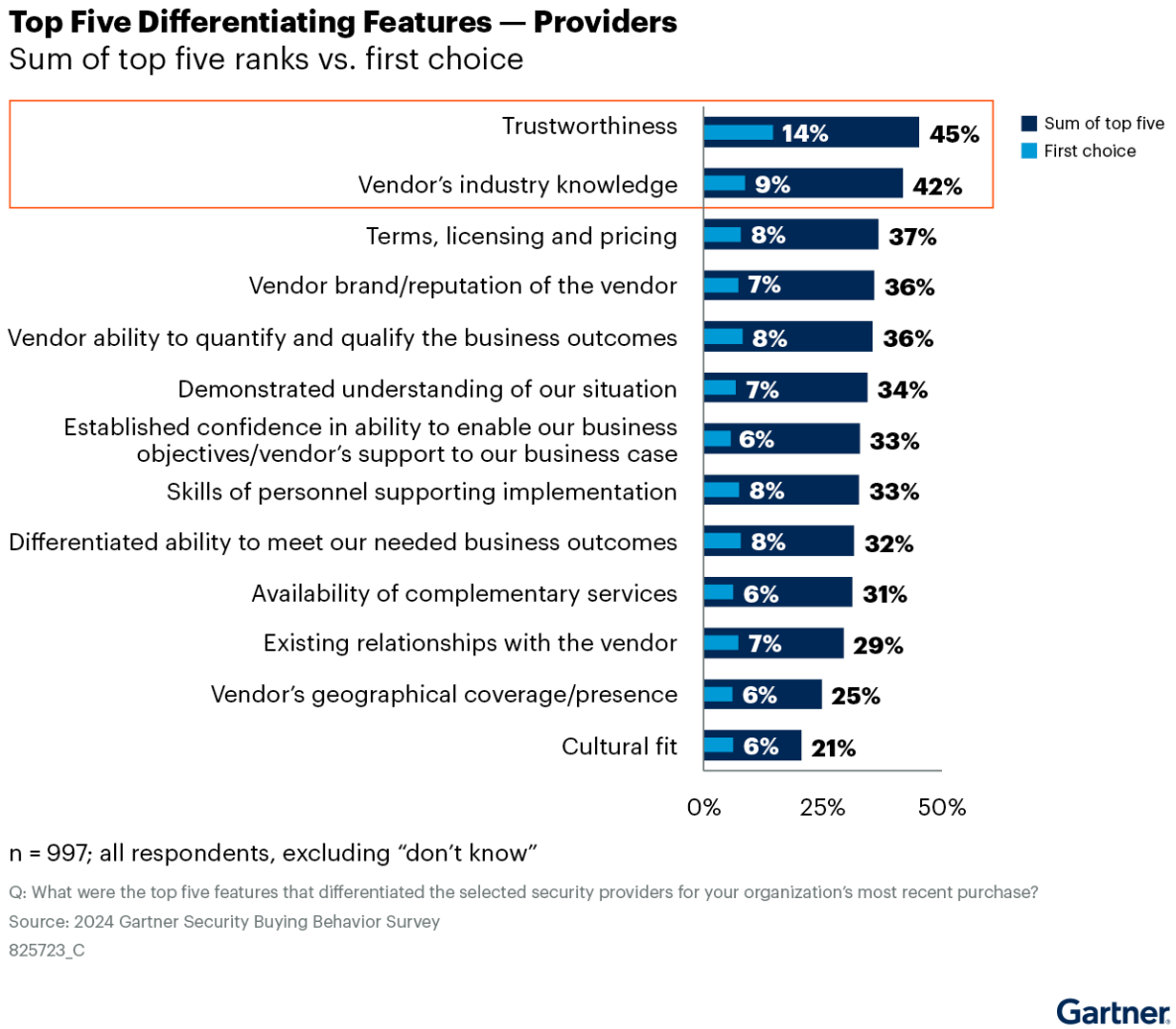
Figure 8 shows trustworthiness and provider's industry knowledge are key differentiators in provider selection, while cultural fit and provider's geographic coverage/presence are lowest in the ranks.

Figure 8: Top Five Differentiating Features — Providers



n = 997; all respondents, excluding "don't know"

Q: What were the top five features that differentiated the selected security providers for your organization's most recent purchase?

Source: 2024 Gartner Security Buying Behavior Survey

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Recommendations

- Understand the key capabilities of peers and the competitive landscape of the market to clearly articulate differentiation and industry knowledge.
- Provide transparency, such as clear communication of policies, processes and pricing, as well as consistency delivering reliable services and obtaining required certifications and accreditations to build trustworthiness.
- Differentiate effectively to get in the shortlists by focusing on security, such as monitoring and visibility, and especially GenAI and how it may augment detection and analysis capabilities as well as performance capabilities/features.

- Demonstrate industry knowledge and highlight unique attributes by applying customer segmentation and target-specific use cases in small segments, such as by vertical or a specific focused pain point, as well as prioritizing investments in industry specialization.
- Highlight the top most compelling product elements. For example, since product security is at the top of product differentiation elements, showcase how the product can help with the buyer's compliance criteria, how to ensure the product is trustworthy when implemented, or how it connects securely or integrates to current security environments/tools. This can also drive highly industry-specific marketing to account for differing CISO priorities.
    - Note that long lists get lost or are not effective in the differentiation messaging.
    - Capability-based differentiation is not sustainable and easily matched by competitors, especially now with more agile development and as-a-service offerings.

Evidence

[1] **2024 Gartner Security Buying Behavior Survey.** This survey sought to understand the behavior of cybersecurity leaders regarding how they approach technology-related decisions and engage with potential providers. The survey was conducted online from September through November 2024 among 1,001 respondents from organizations with annual revenue of at least $50 million or equivalent from Asia/Pacific (25%), North America (40%) and Western Europe (35%). Industries surveyed include banking and financial services, communications and media, education, government, healthcare providers, information technology, insurance (health and nonhealth), manufacturing, natural resources, pharmaceuticals and life sciences, retail, services, transportation, utilities, and wholesale trade. Qualified respondents were involved in the evaluation, selection or approval of providers for cybersecurity-technology-related purchases. These participants were either the most senior information security officer in their company (51%), one level below (33%), two levels below (14%) or three levels below (2%). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

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