



**Superpowers**  
INDEX

Fast, simple, trusted:  
**How B2B brands  
win in the AI era**

**The Superpowers Index 5.0**

The world's most comprehensive study  
of B2B buyer behaviour

## Foreword

As we enter the period of the AI-powered buyer, brand, speed and ease emerge as the three priorities for B2B brands looking for a winning edge.

The Superpowers Index is the largest ever systematic study of B2B buying behavior globally. We've been running it annually since 2021 and, with over 16,000 interviews in the databank, it gives us a unique insight into the changing behaviors of B2B buyers.

This year we are seeing an intriguing contrast. On the one hand, buyers have become more risk-averse and pragmatic in response to tough economic conditions. At the same time, AI is offering new opportunities to simplify and accelerate the buying process – something everyone wants.

The biggest difference between winning and losing remains trust. However, the way that marketers build their brands and reach their audience is changing, as word

of mouth and influencer popularity grow and marketers adapt to meet buyers where they are.

In this report, you'll find the three big headlines from this year's study. The Superpowers Index is so much more than just a piece of research: we use it every day, as a diagnostic tool to build winning strategies for our clients. If this taster leaves you wanting to find out more, we'd love to hear from you.



*Rob Gold*

**Rob Gold**

Global President, dentsu B2B

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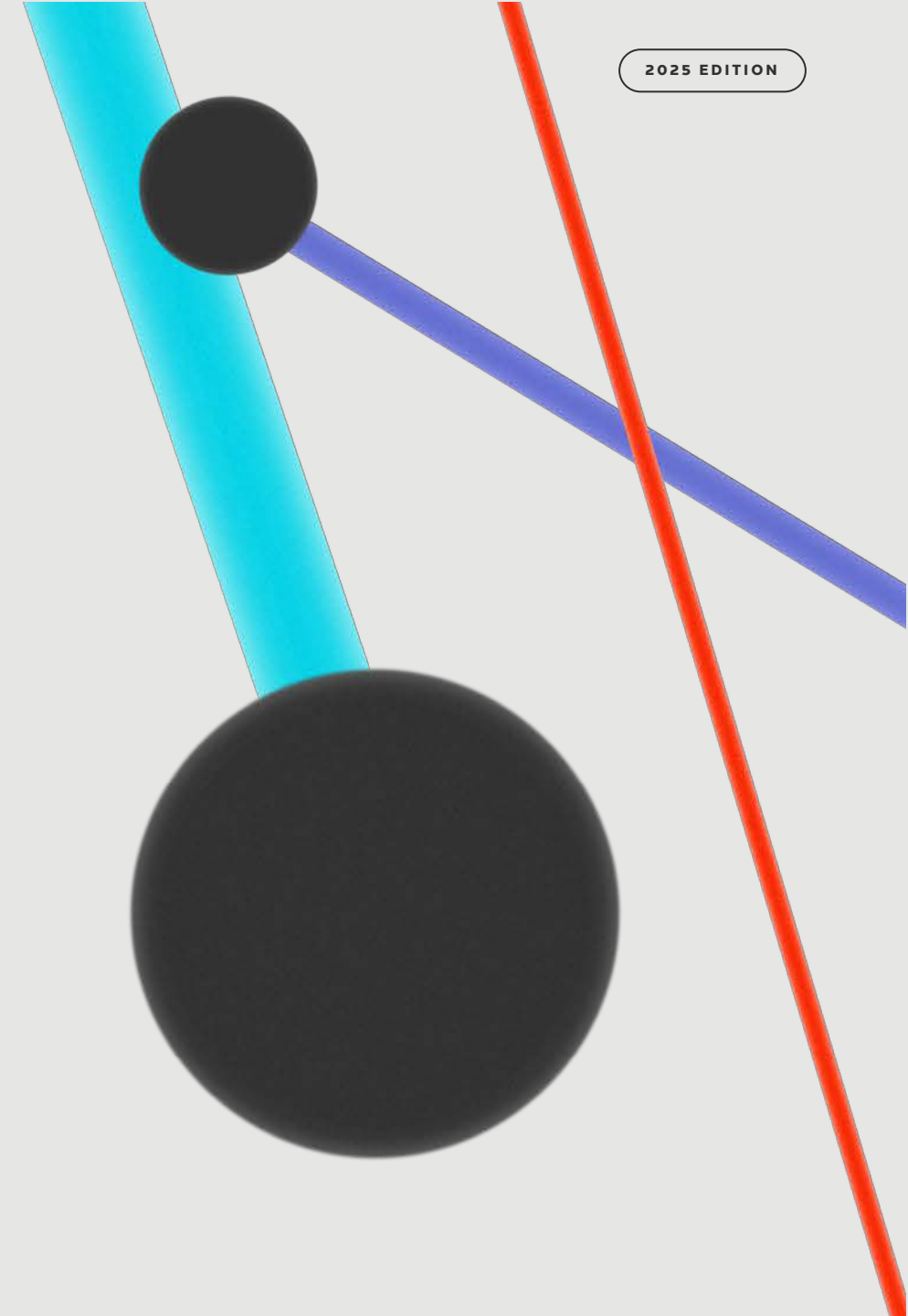
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# About The Superpowers Index



# The Superpowers Index 2025 Edition:

The global benchmark  
of B2B buying behavior



## THE DRIVERS OF B2B BUYING DECISIONS

What's important to buyers  
and what makes the difference  
between winning and losing.



## THE B2B BUYING JOURNEY

Who is involved and what  
makes a difference to them at  
each stage.



## COMMERCIAL IMPACT

How improving the buying  
experience drives commercial  
outcomes.

6,107 B2B decision maker interviews  
Over 16,000 since 2021



35,000+ brand experiences in total



Technology



Financial  
Services



Professional  
Services



Manufacturing



## How the Superpowers Index works

**01**

**Each year, we survey B2B decision makers and ask them in depth about recent buying experiences**

Map recent B2B purchase journey behaviors, brand experiences & decision drivers

**02**

**We identify the factors that make the biggest difference between winning and losing**

Identify the 'high impact' factors

**03**

**We connect this with commercial outcomes: size of the deal, propensity to re-purchase, consideration for other categories, loyalty metrics etc.**

Monitor the commercial outcomes of doing the high impact things well



# About The Superpowers Index score

The Superpowers Index score is a single metric that captures overall brand experience.

The Index is measured from 0-100 and weighted according to how buyers rank brands performance against 30 decision drivers.

The Index takes account of cultural factors to ensure the score is comparable between countries, industries and company profiles.

|             |                | % of B2B experiences that meet this standard |         |
|-------------|----------------|--|---------|
| Grade       | SP Index Score | in 2024                                      | in 2025 |
| Exceptional | 90+            | 15%  | 13%     |
| Very Strong | 85-90          | 14%  | 16%     |
| Strong      | 80-85          | 12%  | 14%     |
| Good        | 70-80          | 21%  | 22%     |
| Average     | 60-70          | 17%  | 16%     |
| Poor        | <60            | 22%  | 19%     |

We have brand performance data for different industries and over 170 brands, giving precision to improving future buying experiences.

## BETTER EXPERIENCES, BIGGER DEALS!

A ten-point improvement in The Superpowers Index Score correlates with a **14% uplift\*** in the dollar value of an opportunity, on average.

\*Based on regression modelling linking Superpowers Index Scores to contract value reported over a 2-year sample with controls for size, country, purchase category and purchase circumstances.



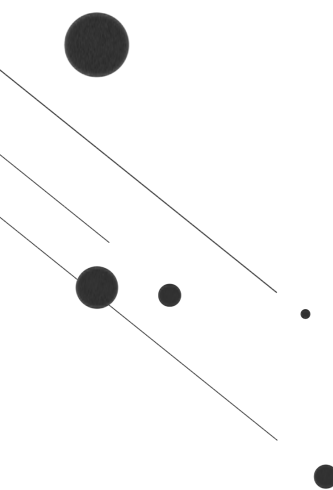


# The story so far...

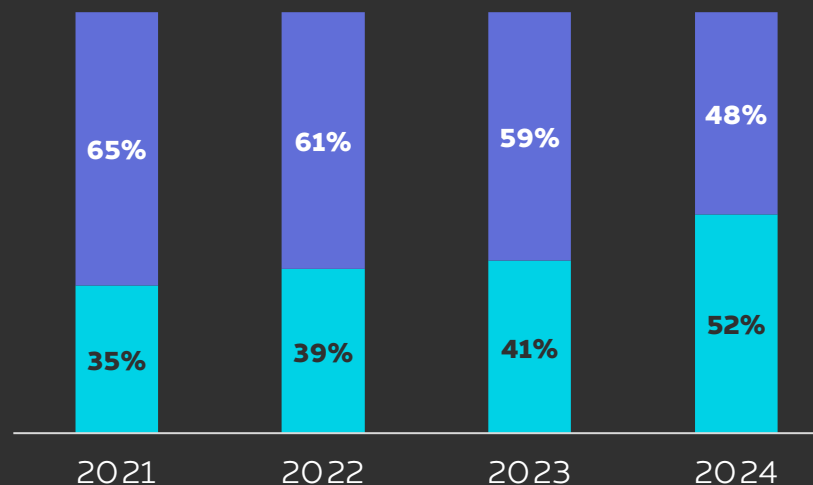
A recap of where we left you last year

## In 2024, we saw personal decision drivers outweigh professional drivers for the first time

For four years, B2B buyers had put a growing emphasis on personal decision drivers, like trust and values alignment. In 2024, the balance tipped in favour of personal drivers for the first time. Will that trend hold?



### Overall influence of decision drivers on B2B purchase decisions



#### PROFESSIONAL DECISION DRIVERS

E.g. competitively priced, products and services just work, variety and choice

#### PERSONAL DECISION DRIVERS

E.g. feel safe signing a contract, aligns with personal values/ethics, teaches me new skills/knowledge





# The top three decision drivers in 2024 showed that brand had never mattered more in B2B

In 2024, trust remained the top decision driver. The fastest growers were being ‘known as a good employer’ – a proxy for a brand’s trustworthiness – and thought leadership, showing the importance of brand.

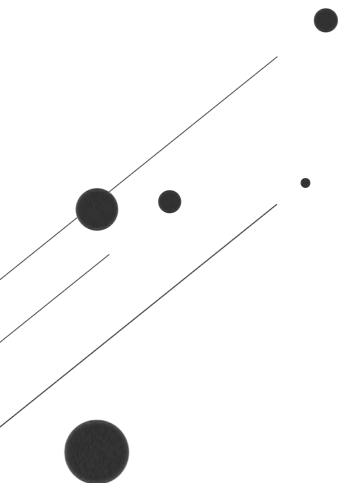
|  | RANK |      |
|--|------|------|
|  | 2023 | 2024 |
| I feel safe signing a contract with them       | 1    | 1    |
| Is known as being a good employer              | 10   | 2    |
| Active thought leader in their category/sector | 20   | 3    |

The top decision drivers based on the relative impact on winning and losing, The Superpowers Index, 2024

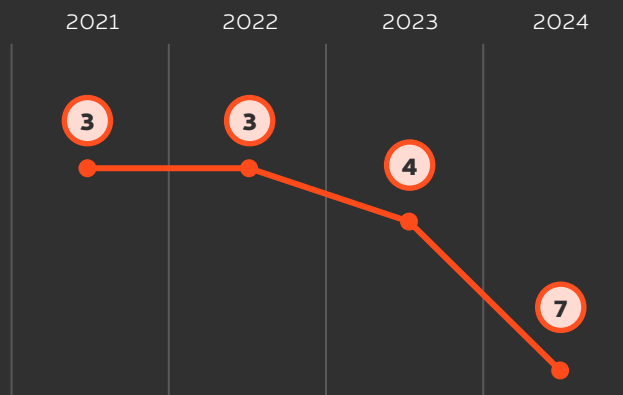


## Marketers were signalling their response

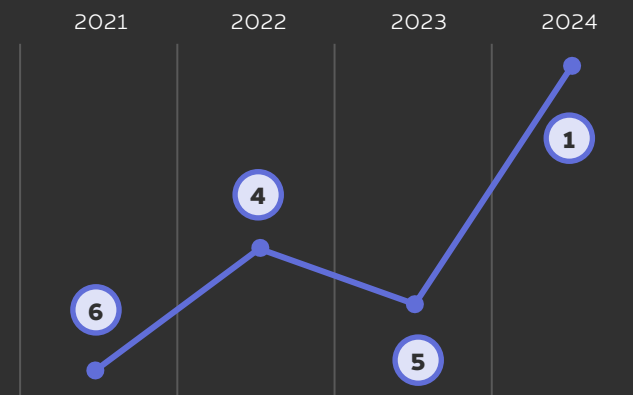
The intent from marketers was clear. When it came to their plans for 2025, they would deprioritise lead generation and put more investment into brand building. Would they stick to their word?



### 'Demand generation/driving and converting leads'



### 'Raising brand awareness/top of funnel performance'



Rank given by B2B marketers in 2024, based on importance to future strategy



# In the era of the AI-powered buyer, what is giving B2B brands the edge?

The key trends in B2B buying





## Three trends that define winning buyer experiences in 2025

**01**

### Getting back to business

Buyers are focusing more on professional drivers, balancing risk in response to uncertainty.

**02**

### The changing face of brand

Trust is still the #1 driver but the way brands build trust is evolving.

**03**

### Ease is the new edge

Winning brands are simplifying the buying process, including with AI.





TREND ONE

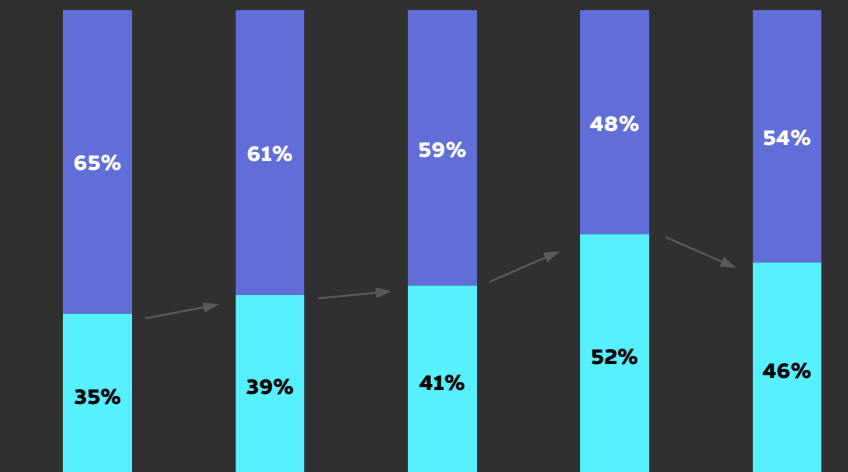
# Getting back to business

## In 2025, B2B buyers are striking a balance between personal and professional decision drivers

This year the long-term growth in the importance of personal decision drivers was checked.

In 2025, buyers looked for a balance between personal drivers like trust and values-alignment and professional drivers like dependability and compliance.

Overall influence of different types of decision drivers on the likelihood of being selected



### PROFESSIONAL DECISION DRIVERS

E.g. competitively priced, products and services just work, variety and choice

### PERSONAL DECISION DRIVERS

E.g. feel safe signing a contract, aligns with personal values/ethics, teaches me new skills/knowledge



## Top Ten Revealed: Buyers prioritize functionality and integration, but trust remains top

**The Superpowers Index top ten shows decision drivers ranked by the impact they had on winning or losing.**

For the third straight year, ‘feeling safe signing a contract’ remains the top driver.

But the big upward movers show a greater pragmatism in response to tightened economic circumstances, as buyers prioritize solutions that can be integrated smoothly and work well with their current environment.

We see a new balance emerging, as brands need to both build trust and evidence dependability in their marketing.

| Decision Driver  | 2024 | 2025 | YoY |
|--|------|------|-----|
| I feel safe signing a contract with them                             | 1    | 1    | 0   |
| Integrates smoothly with our processes and operations                | 18   | 2    | 16  |
| Meet my company’s minimum quality/functional needs                   | 7    | 3    | 4   |
| Comply with regulations, law, industry standards & ethical practices | 4    | 4    | 0   |
| Takes care of its suppliers, business partners and communities       | 5    | 5    | 0   |
| Is a brand that aligns with my personal values and ethics            | 6    | 6    | 0   |
| Approachable & transparent in their dealings with us                 | 21   | 7    | 14  |
| Provides the support, information and expertise we need              | 10   | 8    | 2   |

When B2B brands perform well across the 10 most important decision drivers

**37%**

Shorter sales cycles

**2x**

More likely to be adopted for further services

**+85 vs. +36**

They receive much higher NPS scores





## In 2025, we see signs of greater risk-aversion in B2B buyers

Despite casting a wider net, buyers are more reluctant to change the status quo, showing a shift to a more risk-averse mindset.

**+13%**

**Brands  
considered**

The number of brands considered as part of B2B buying journeys vs. 2024

**-7%**

**Incumbent  
loss rate**

The loss rate of existing supplier is decreasing compared to 2024

### INCUMBENTS WIN ON EXPERTISE

The top three drivers that make a difference when incumbent suppliers retain their business:

- Active thought leaders in their category/sector
- Provides the support, information, and expertise we need
- Products and services just work and are not prone to fail

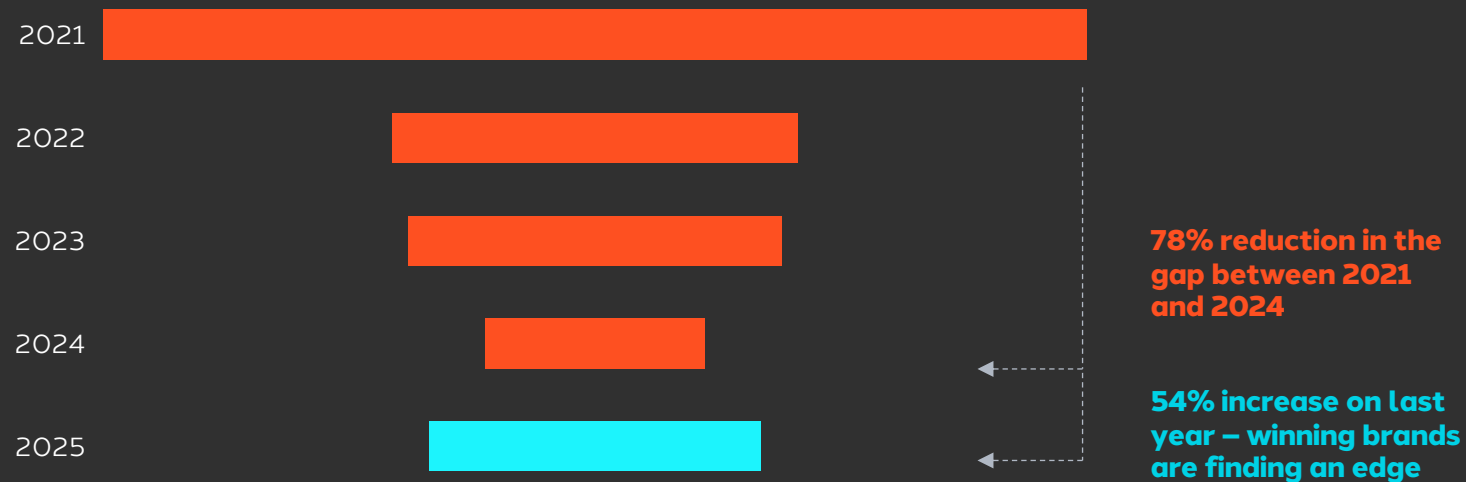
## Differentiation Returns: The gap between winners and losers widens

For the first time in four years, we've seen the gap between winning brands and losers get bigger.

Winning brands are finding an edge and convincing buyers there is more meaningful difference between them and the alternatives.

The rest of this report unpacks where winning brands are finding that edge, and what it means for marketers.

### The competitive gap between the winning brand and losing brands has grown



## Six Ways To Accelerate Revenue: The power of standout buyer experiences

One critical way brands are getting an advantage from a stronger buyer experience is by accelerating the deal cycle.

The Superpowers Index databank allows us to look at how brands are doing this.

We've picked our top six tips for B2B marketers looking to accelerate their deal cycles and given an idea of the average gain achieved when brands do this well.

|  | THEME   | ACTION   | POTENTIAL<br>DECISION TIME<br>SAVED* |
|--|---|--|--------------------------------------|
|  | <b>Create a memorable experience from the start</b> | A strong <b>initial interaction</b> between buyer and seller – put the customer first and align product/service benefits to their needs            | <b>9 weeks</b>                       |
|  | <b>Invest in advocacy and community</b>             | Empower buyers with <b>peer validation</b> and <b>recommendations</b>  | <b>9 weeks</b>                       |
|  | <b>Be personal</b>                                  | Ensure buyers feel valued through <b>personal touchpoints</b> (telephone calls; in-person events)  | <b>8 weeks</b>                       |
|  | <b>Add humanity</b>                                 | Create authentic, <b>people-led stories</b> , using <b>channels</b> which cut through (audio, like podcasts; customer stories; supplier personnel) | <b>8 weeks</b>                       |
|  | <b>Build trust with the whole buying group</b>      | Ensure the <b>buyer</b> and <b>wider DMU</b> feel <b>reassured</b> throughout the whole buying experience  | <b>6 weeks</b>                       |
|  | <b>Engage 'hidden buyers'</b>                       | Build strong connections with the buyer's <b>procurement function</b> and <b>c-suite stakeholders</b>  | <b>3 weeks</b>                       |

Shortening of decision timeframes associated with B2B purchase experiences with the above characteristics.

## Good thought leadership is now table stakes

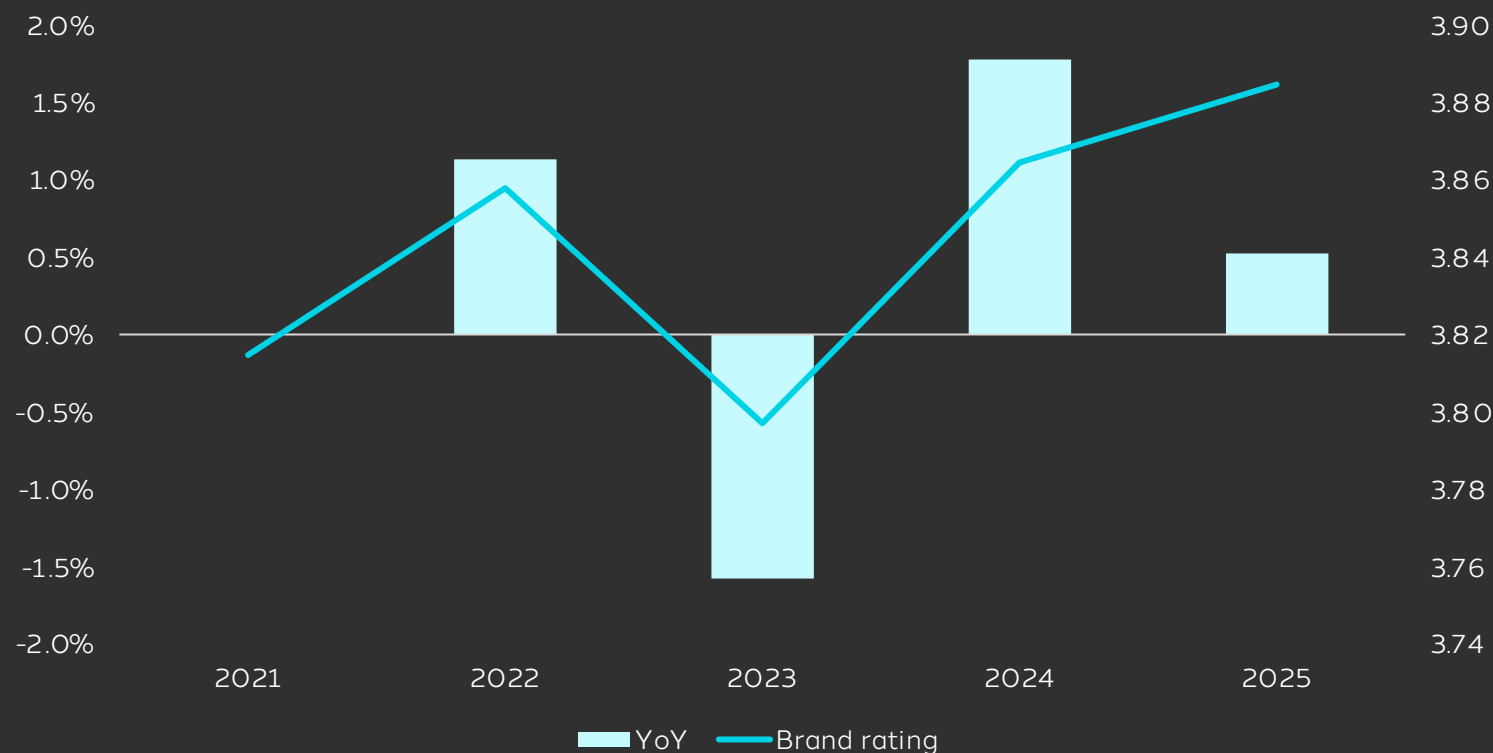
**The overall standard of thought leadership, as rated by buyers, was higher than it has ever been in 2025.**

This explains why 'Being seen as an active thought leader' dropped from #2 in our top 10 decision drivers last year to #11 this year.

It is not that buyers are turning off thought leadership; it is simply that the bar has been raised.

In fact, brands that perform well at thought leadership are 2x more likely to score highly for the top decision driver, 'I feel safe signing a contract with them' and it's the top reason incumbents retain business.

Average brand rating for 'active thought leaders in their category/sector'







TREND TWO

# The changing face of brand

## Trust: The #1 difference-maker three years running

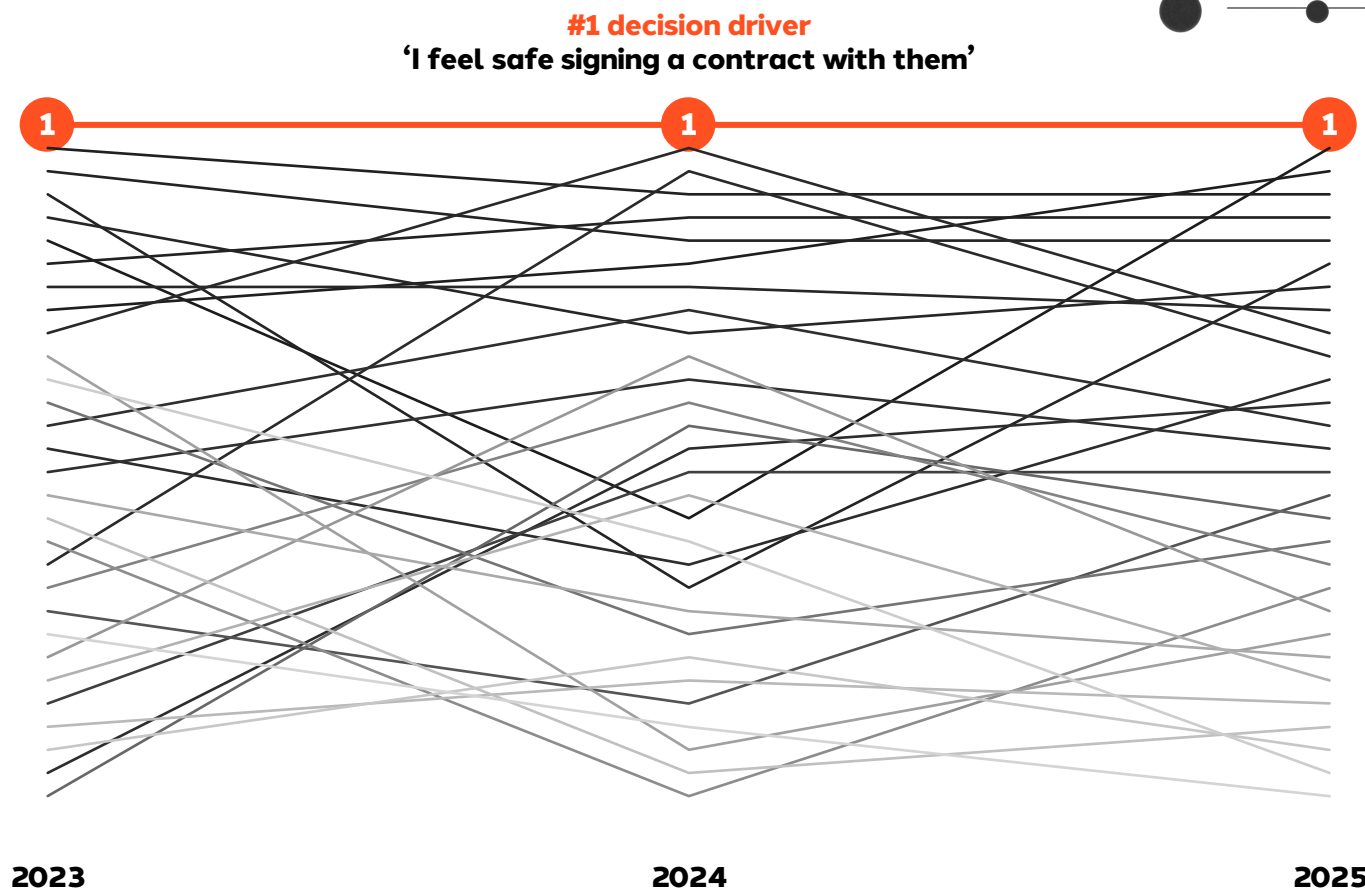
Each year, we rank the 30 decision drivers by what makes the biggest difference to B2B buyers. What matters most when it comes to the crunch?

Each year, we see some big swings in what matters, as buyers react to the changing macro environment and to improvements B2B brands make in their Go-To-Market (GTM).

But every year, there is one constant. Sitting proudly at the top of the charts, unmoved by macro trends, is the perma-trend of B2B buying. Trust wins.

So how do brands make buyers feel safe?

The Superpowers Index allows us to dig further...



Ranking of 30 decision drivers based on their overall influence on winning and losing in the B2B buying experience



## Brand strength: The foundation of buyer confidence

**When we look in more detail at what brands that buyers score highly for ‘I feel safe signing a contract with them’ we see three qualities that underpin safety.**

They show the power of brand. To build trust, brands need to reach and building a reassuring reputation with all potential buyers. We see the importance of a brand’s reputation across the whole buying group. And we see the continued rise in importance of peer recommendations and reviews.

As buyers grow their ability to do their own research and AI is more widely adopted, we’re also seeing buyers place more emphasis on recommendations from peers and colleagues.

The three top qualities of brands scoring highly on  
**‘I feel safe signing a contract with them’**

**Brand reputation**

**‘I was reassured by the brand's track record’**

**Brand reach**

**‘It was easy to convince my colleagues of the brand’s credentials’**

**Brand advocacy**

**‘I read positive reviews on brand’**



## First impressions & thought leadership both count towards trust



Buyers who are delighted with their initial supplier interaction are twice as likely to highly trust that brand.



Brands seen as active thought leaders in their category are twice as likely to be highly trusted.







## Earning trust is different based on who you target

For buyers in large enterprises, it is more often innovation and values-alignment that differentiate winning suppliers from those they choose not to work with.

Whereas smaller businesses are inevitably more functional in their outlook, prioritising compliance and access to much-needed expertise.

### Decision Driver – Large Enterprise Top 5

I feel safe signing a contract with them

1

Leader in innovative products & services

2

Integrates smoothly with our processes and operations

3

Is a brand that aligns with my personal values and ethics

4

Approachable & transparent in their dealings with us

5

### Decision Driver – SME Top 5

I feel safe signing a contract with them

1

Meet my company's minimum quality/functional needs

2

Comply with regulations, law, industry standards & ethical practices

3

Integrates smoothly with our processes and operations

4

Support us with expertise

5



## Brand Building: From intent to investment in 2025

Last year B2B marketers signalled their intention to invest more in brand. This year, we can see they delivered on that promise, with brand rising eight places to join industry expansion and customer experience in the top three.

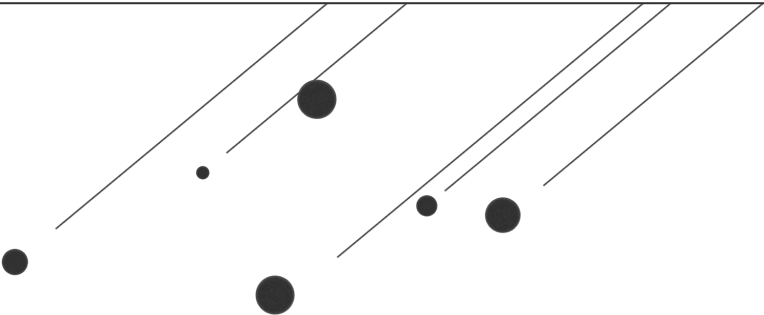
The investment in brand has coincided with an overall improvement in performance, as brands are scoring higher across almost all areas of the buyer experience in 2025 compared to the previous year.

### Which of these marketing strategies is your organization focusing on at present?

|  | 2025 | YoY |
|--|------|-----|
| New market opportunities – maximizing reach in new industry sectors      | 1    | 0   |
| Customer experience and loyalty  | 2    | +1  |
| Raising brand awareness/top of funnel performance                        | 3    | +8  |
| Product development/innovation   | 4    | -1  |
| New market opportunities – maximizing reach in new countries/territories | 5    | 0   |



# Why Buyers Switch: The triggers shaping modern B2B brand choice



## Top 3 triggers to look for a new B2B supplier

|    |  |            |
|----|--|------------|
| 01 | Increase in customer expectations      | 36% (+1.6) |
| 02 | Conversations with other professionals | 32% (+1.1) |
| 03 | Organization growth                    | 32% (+2.7) |

Growing customer expectations remains the top reason why buyers kick off a new selection process. We see the importance of word-of-mouth as one of the most impactful tactics marketers can lean on to stimulate demand.

## Top 3 areas of existing provider underperformance

|    |                                       |            |
|----|---------------------------------------|------------|
| 01 | Being dependable                      | 37% (+3.5) |
| 02 | Adapting to the needs of our business | 35% (+4.4) |
| 03 | Adding financial value                | 35% (+0.5) |

Those incumbents that are losing are leaving the door ajar for competitors when buyers question their dependability or ability to adapt to the customers’ business.



## Engaging through influencer marketing has huge potential for growth



59%

Of buyers used influencers in their last purchase decision

vs

42%

Of marketers felt they do a good job of 'Making effective use of subject matter experts and influencers to promote our brand'

**Influencer is an untapped opportunity for B2B brands in 2026.**

It was the fastest growing channel in its influence on B2B decisions this year, with nearly two-thirds of buyers saying they referenced influencers in their most recent buying process. At the same time, marketers see plenty of room for improvement in how this channel is used.



## Top priorities for 2026: Marketers plan to double down on relevance and experience

B2B marketers plan to continue investing in brand in 2026, but with a specific goal: relevance.

As we see growing numbers of Gen-Z in decision making roles, B2B marketers are prioritizing modernizing their brands, alongside investment in the customer experience and continued innovation.

|  | 2025 | YoY |
|--|------|-----|
| New market opportunities – maximizing reach in new industry sectors      | 1    | +1  |
| Product development/innovation   | 2    | +2  |
| Modernizing our brand e.g. making it more relevant                       | 3    | +10 |
| Customer experience and loyalty  | 4    | +9  |
| New market opportunities – maximizing reach in new countries/territories | 5    | -1  |

**Which marketing strategies do you anticipate will be most important for your business looking ahead to 2025/2026?**



TREND THREE

# Ease is the new edge

## What makes winning brands winners?

**There were three things that winning brands this year were doing markedly better than losing brands.**

In straightened times, it may be no surprise to see competitive pricing making a difference – though as we will see there is more to this than cost.

The other two big swing factors show the rise of ‘buyability’: winning brands are making it easier for buyers to buy, simplifying the buying processes and fitting their solutions to the buyer’s world.

### More differentiating this year →

Competitively priced

Products/services are not too complicated

Integrates smoothly with our processes and operations

YoY change in the difference between winning brand vs runner up: Top 3



## Being ‘competitively priced’ is about value and ease.

**When we look at what makes brands score highly with buyers for being competitively priced, it is not the cost they focus on but the value.**

Brands that make it easier for buyers by providing the information and expertise they need, when they need it are winning. Those that save buyers time and do what they say they will do have the edge.

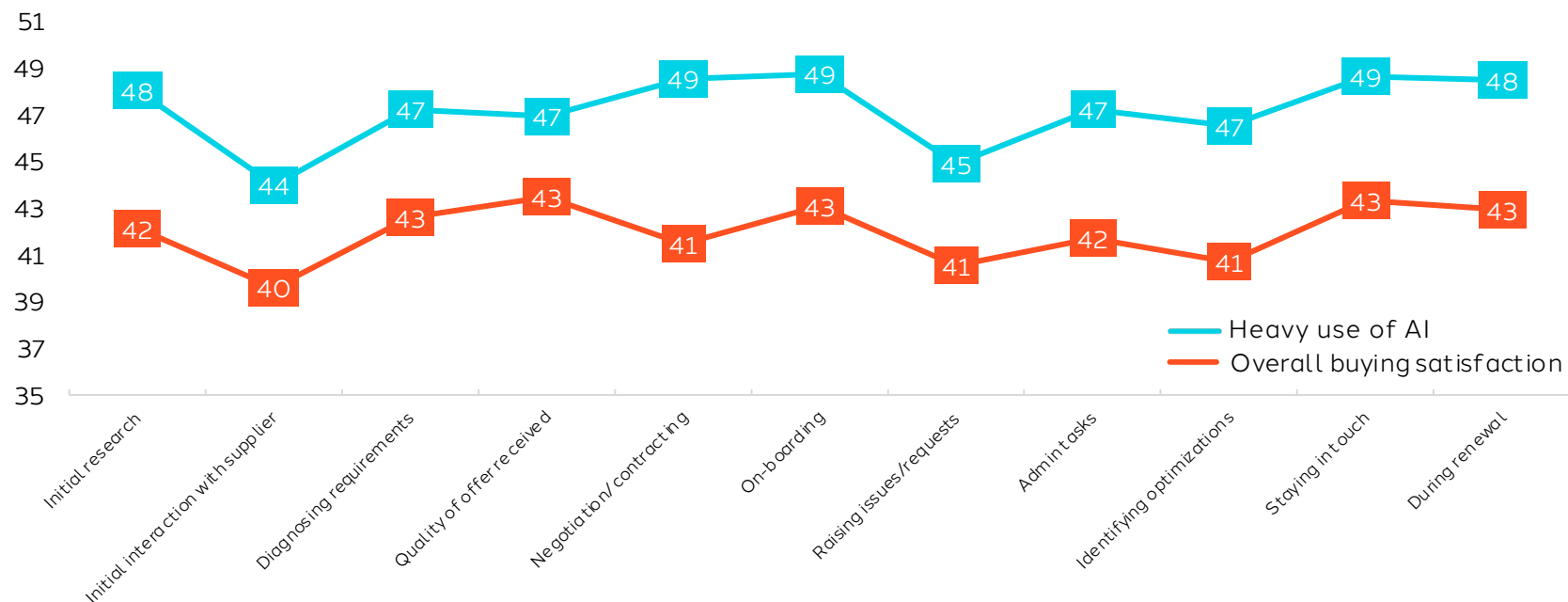
### Drivers of being seen as 'competitively priced'



# AI is enhancing every stage of the buyer journey

AI is improving the buyer experience for buyers; the more it's used, the better the experience at every stage, not just research. As adoption surges, it is a top opportunity for brands looking to make it easier for buyers to buy.

**Decision maker satisfaction across the purchase journey**



DMs. W2N16 (winning brand, 9-10) vs SP4\_Q11. \*based on AI benefits most directly related to the buying process: More informed decision-making (e.g. due to AI-driven insights); 24/7 support and customer service; Quicker to buy/transact/deal with suppliers; More customised products and services, More personalized/predictive recommendations, Improved quality assurance

## AI ADOPTION SURGES

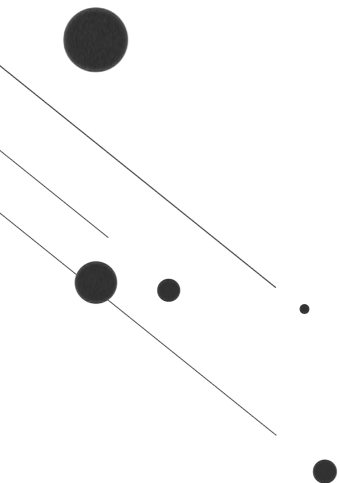
77% of all buying processes used AI and the proportion of heavy users grew to 40%





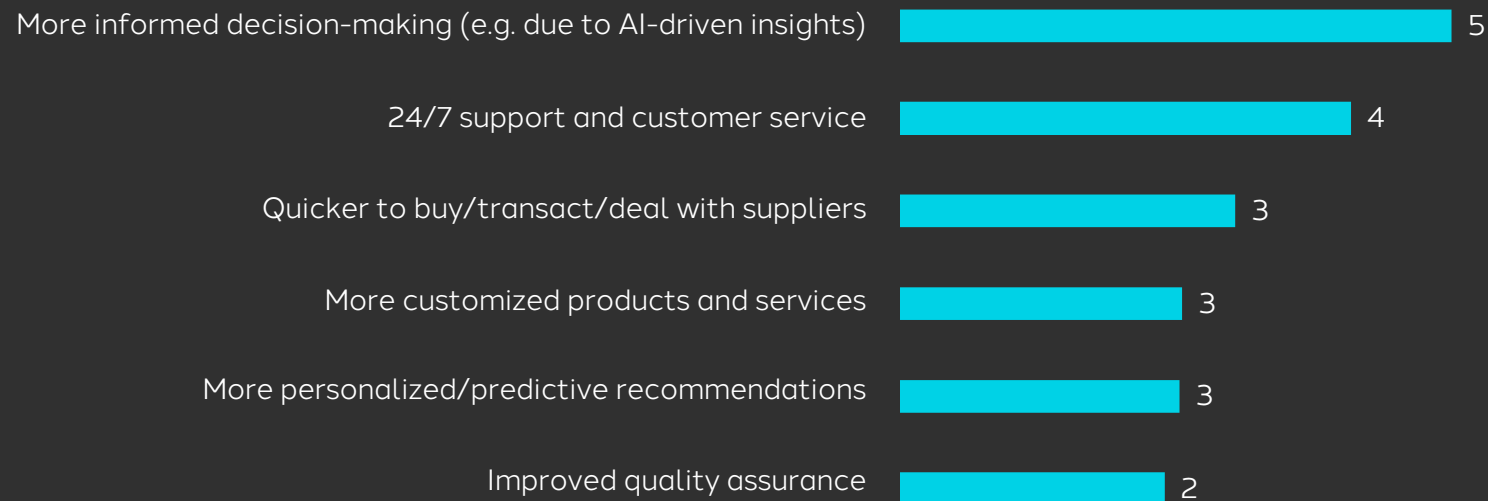
## AI Is Raising The Bar: Buyers now expect faster, smarter, more tailored experiences.

The use cases for AI are broad; the winning brands are finding multiple ways to make it easier for buyers to buy.



### Expected benefits from the adoption of AI technologies when dealing with suppliers

#### DMs, YoY %pt change 25 vs. 24



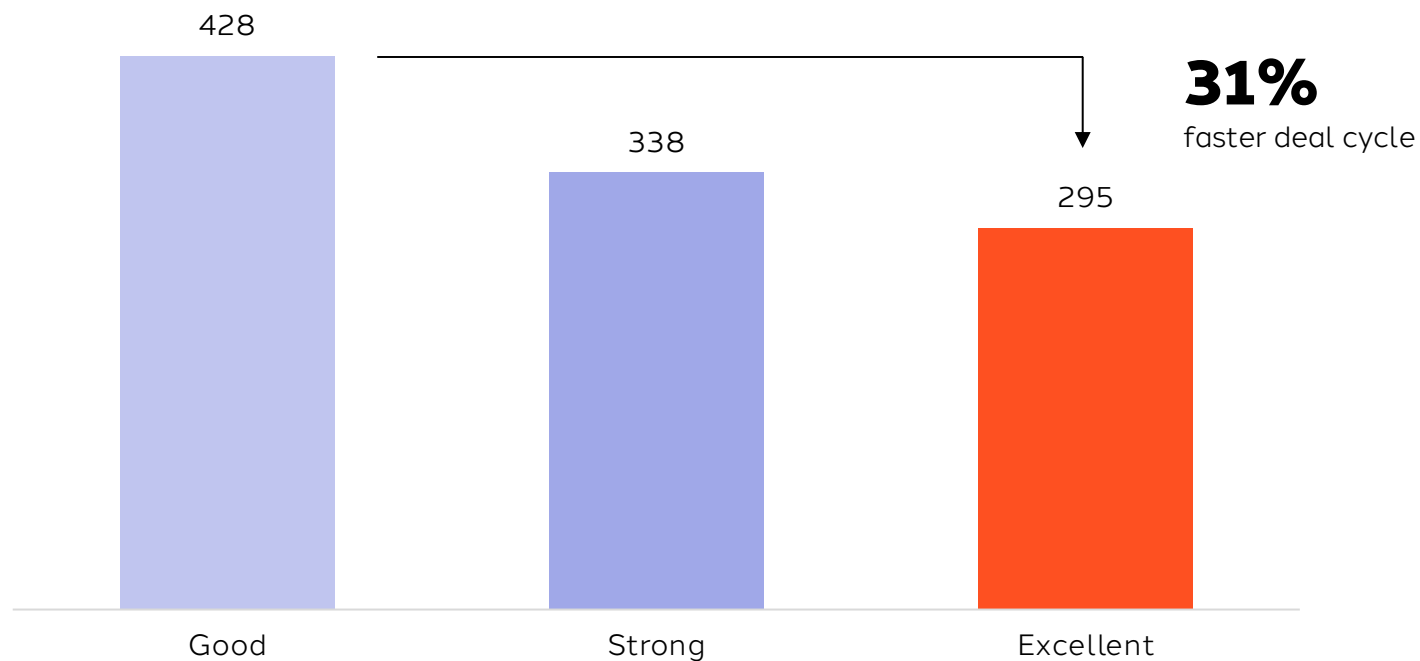


## Brands that make it easy shorten the buying cycle

The reward for a smoother buyer experience is clear. Every step-change in improvement shortens the average deal cycle. Those brands with excellent buyer experiences are closing business up to four months faster than poor performers.

That's a prize worth investing in.

**The average sales cycle in days based on how strong a brands buyer experience is rated (winning brands)**







# In summary





## How B2B brands can win in the AI powered era

**01**

### Getting back to business

**Buyers are responding to the economic environment, making more balanced decisions, and rewarding brands that have distinctive value propositions**

You can respond by meeting buyers where they are. Adjust your messaging to reflect their context. Add humanity into your buying journey and give buyers the opportunity to connect with peers and experts to help them get comfortable with risk.

**02**

### The changing face of brand

**Trust remains the biggest swing factor for buyers choosing a brand, but how you build that trust keeps evolving**

B2B brands have gone from intent to investment in brand this year, and that needs to continue. As classic brand strategies like reach and relevance continue to be important, the rise of new channels like influencer and community create new opportunities.

**03**

### Ease is the new edge

**As AI infiltrates every aspect of the buyer journey, buyers are expecting faster, more responsive experiences**

Winning brands are adopting a mantra of 'buyability', making it easy for buyers to understand their value proposition, convince their peers of its value, and combining AI and human interactions across the buying process. Speed and ease are giving winning brands an edge.



# Putting The Superpowers Index to work





## This year, we have ranked over 170 individual brand's performance

This tells us how each brand is currently performing, where to focus for greater commercial success, and what to do about it.

The Superpowers Index score takes account of cultural factors to ensure it is comparable between countries, industries and company profiles.

The average Superpowers Index Score across all brands in 2025 is 73.

### The Superpowers Index Score

| Grade       | Exceptional | Very Strong | Strong | Good  | Average | Poor |
|-------------|-------------|-------------|--------|-------|---------|------|
| Index Score | >90         | 85-90       | 80-85  | 70-80 | 60-70   | <60  |

**10-point**  
improvement in  
The Superpowers  
Index Score

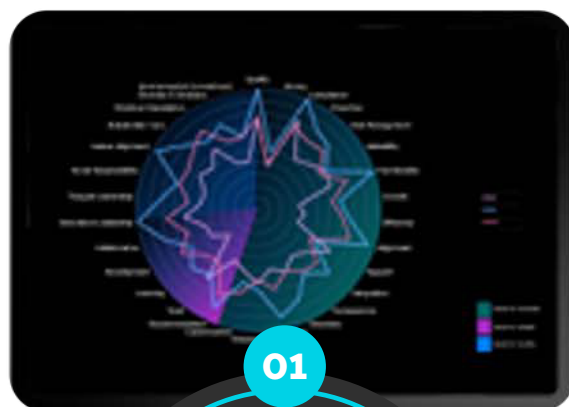


**14% uplift\***  
in the dollar  
value of each  
opportunity

\*Based on regression modelling linking Superpowers Index Scores to contract value reported over a 2-year sample with controls for size, country, purchase category and purchase circumstances.

## Using The Superpowers Index to improve the buyer experience

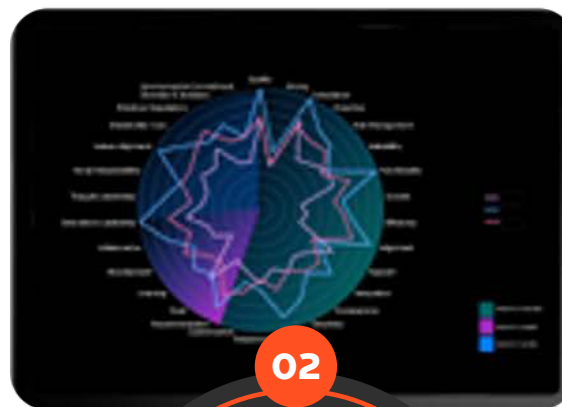
The Superpowers Index is a diagnostic tool. We use it with our customers to provide data-driven discussions about how to improve B2B buyer experience, following a simple three step process.



01

### Level-Set

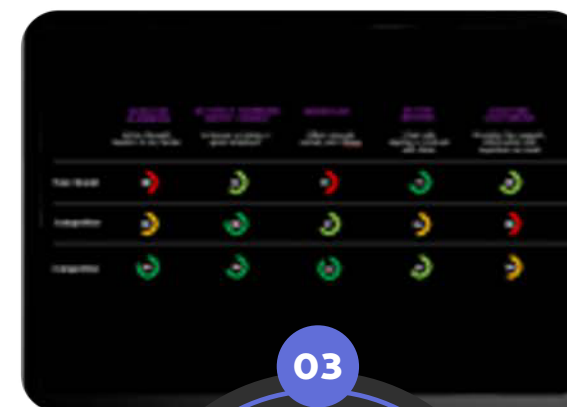
Use Superpowers to map your performance against the top decision drivers and through the buyer journey



02

### Build a hypothesis

Build a richer picture of where to improve and agree specific decision drivers to target



03

### Move the dial

Activate programs in market based on buyer insight to improve performance through the buyer journey



## A rich databank we can cut your way

Speak to us to explore more detailed insight:



**Industry**



**Role**



**Named Brands**



## Dentsu B2B Report Contributors



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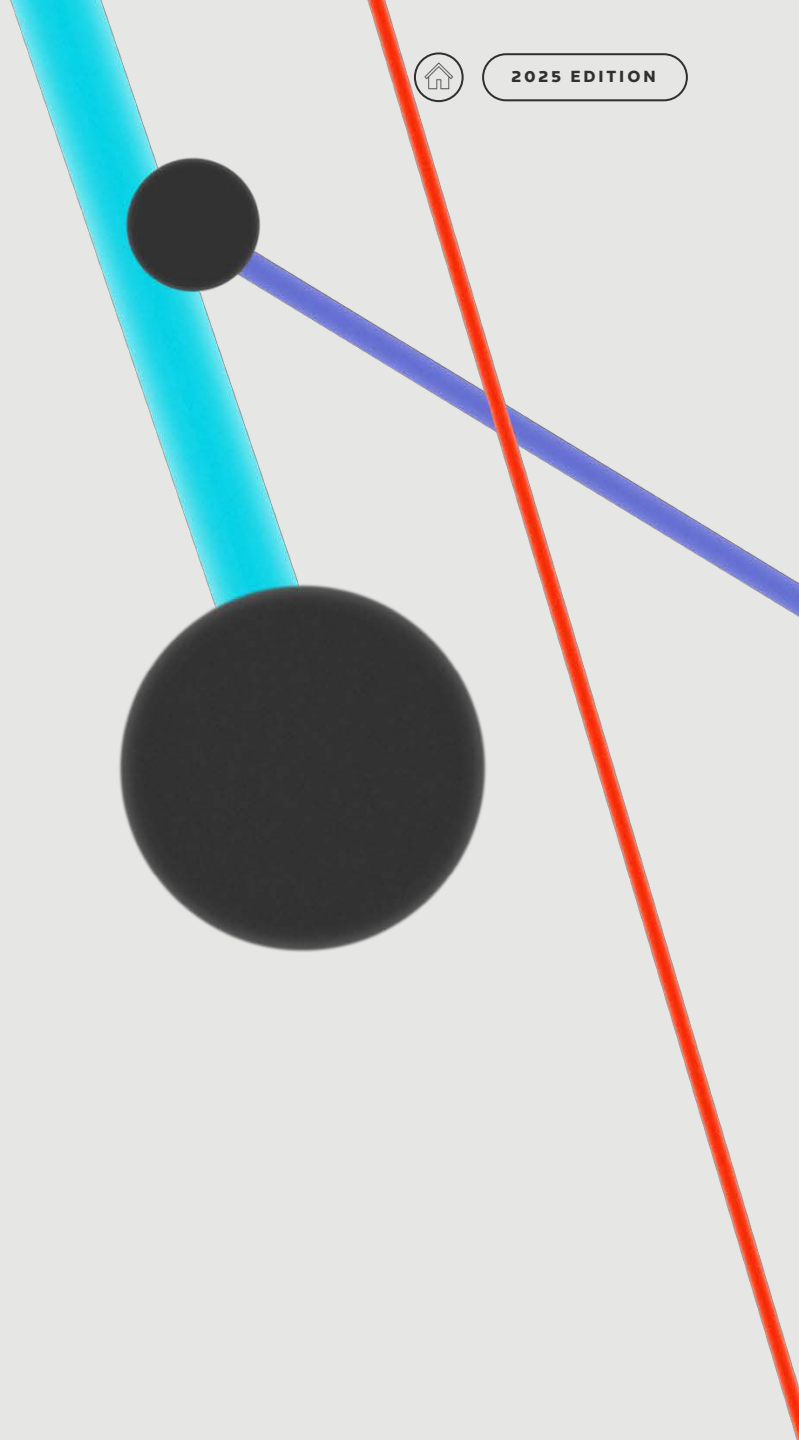
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# Want to learn more?

Get in touch at [superpowers@dentsu.com](mailto:superpowers@dentsu.com)

**This research and analysis has been conducted by B2B International, dentsu's specialist B2B research agency. Originally developed in 2021, The Superpowers Index research has evolved and increased over the years to the level it is today. Find out more about B2B International's research capabilities [here](#).**

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