State of Software_

AUG '24

5 top-level trends.

Design, Hosting, & AI software tools deliver fastest ROI.

Analysis of G2 reviews shows these three software categories set the pace in delivering more immediate business value. 75% of AI buyers report realizing ROI within a year.

AI software continues to dominate product growth.

AI held its spot as the fastest-growing market by far, clocking in at 38% YoY growth. The decrease from 44% YoY growth six months prior reflects the expanding size of this meteoric space.

Image Gen., AI Chatbots, & AI Code Gen. lead in AI category growth.

The race is on as vendors rush to capitalize on the demand for content and media generation at scale. Within AI software, these three generative AI categories have seen the largest increase in products.

AI, GRC, & Data Privacy demonstrate most momentum.

G2's Momentum Score plots where software is headed based on growth in user satisfaction scores, employee growth, and digital presence. These 3 categories stand out with high-growth trajectories.

Vertical Industry categories attract most buyer traffic.

Buyers looking for industry-focused solutions for their businesses flock to G2. This trend shows no signs of slowing as the current AI boom brings enhancements to software spanning vertical markets.
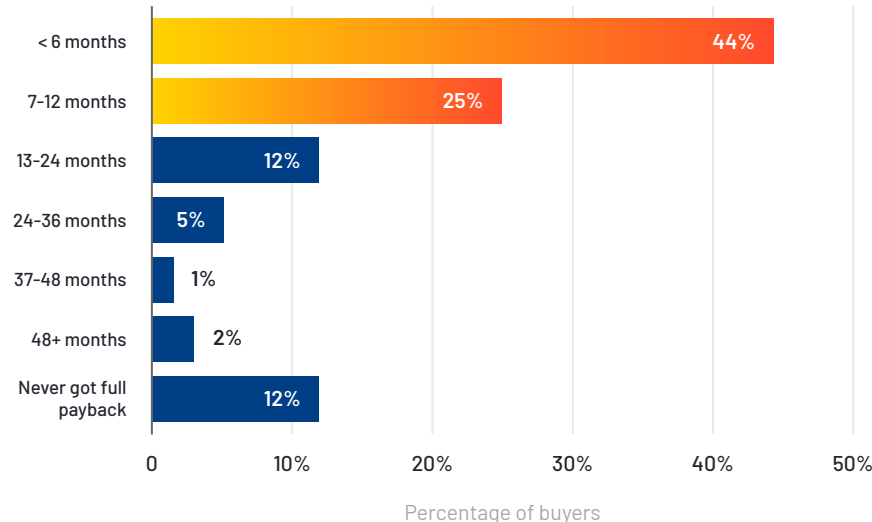
Time to ROI.

It's more important than ever that software sellers prove the value of their product to win, serve, and retain customers. We looked at ROI data from the past four quarters spanning all of G2 (2,100+ categories) to understand where buyers are finding the most value today.
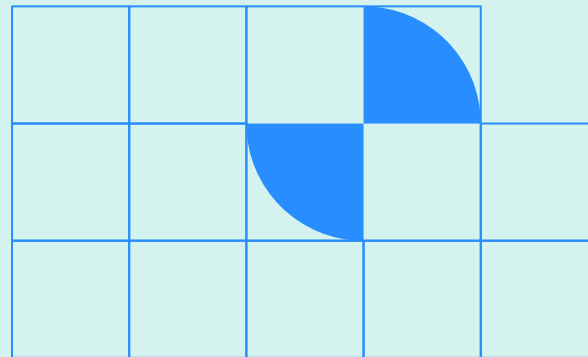
Nearly 7 in 10 software buyers report ROI within 1 year.

Estimated time to achieve ROI on a product

Category	Percentage
< 6 months	44%
7-12 months	25%
13-24 months	12%
24-36 months	5%
37-48 months	1%
48+ months	2%
Never got full payback	12%

Percentage of buyers

Businesses are facing pressures to show results — and are urging vendors to not just tell them how their offerings can drive value, but *show* them.
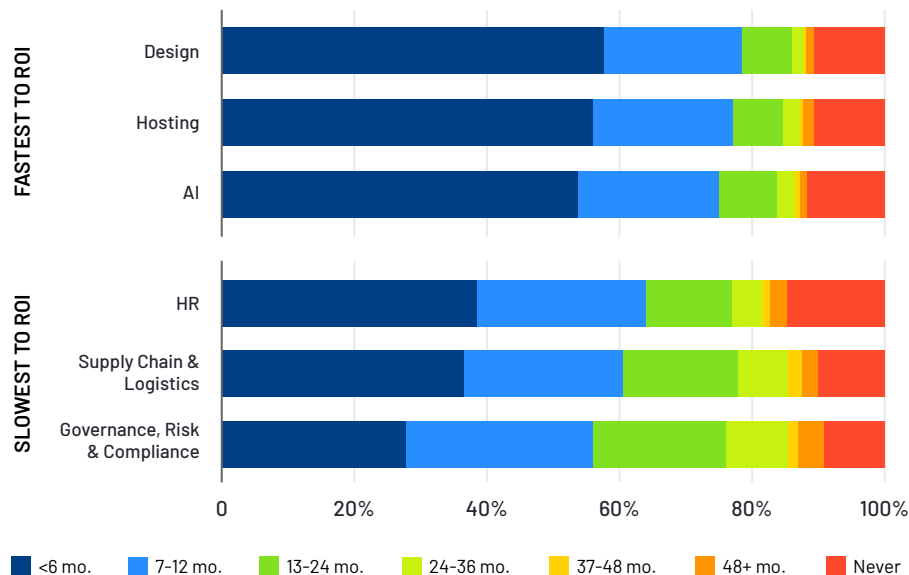
G2's 2024 Buyer Behavior Report, based on a survey of 1,900+ software buyers across the globe, revealed that buyers want to see quick value. In fact, 78% of respondents expressed a desire to realize ROI within 6 months of a software purchase, with 57% having this expectation for just 3 months!

However, reviewers on G2 indicated a gap between expectation and reality, as just 44% reported seeing ROI within 6 months.

Design software delivers fastest value, 79% of buyers see ROI within 1 year.

Categories by time to ROI

FASTEST TO ROI
- Design
- Hosting
- AI

SLOWEST TO ROI
- HR
- Supply Chain & Logistics
- Governance, Risk & Compliance

0   20%   40%   60%   80%   100%

■ <6 mo. ■ 7-12 mo. ■ 13-24 mo. ■ 24-36 mo. ■ 37-48 mo. ■ 48+ mo. ■ Never

"Traditionally, Design tools were created as point solutions to address a specific end user challenge. While Design software providers are beginning to include multiple functionalities to address end to end workflows, point solutions remain prevalent. They typically cost less and solve a narrow scope of work, which leads to a quicker return on investment.

–Priya Patel, *Sr. Research Analyst*
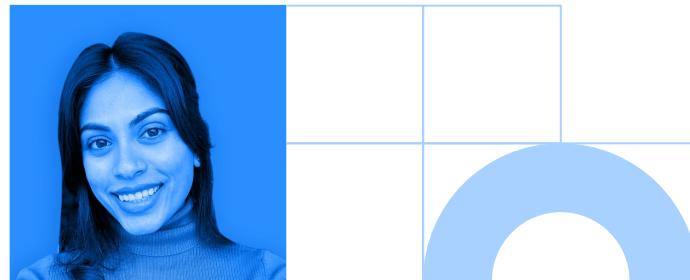
Over 80% of Business Entertainment software users see ROI within 6 months.

Design categories with the fastest time to ROI

| | <6 mo. | 7-12 mo. | 13-24 mo. | 24-36 mo. | 37-48 mo. | 48+ mo. | Never |

Source: G2 data, July 1, 2023 to June 30, 2024
Note: List includes categories that received at least 40 reviews with ROI ratings in 2023.
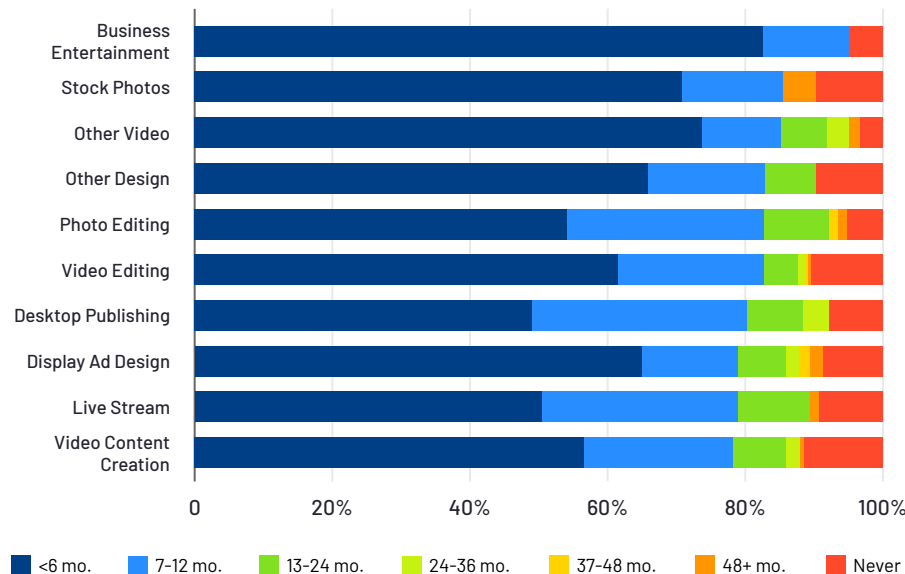
"Content continues to conquer, especially visual and video content. Software that enables businesses to cut through the noisy digital landscape and engage their customers through high quality content delivers a substantial return on investment. Buyers will opt for tools that help them create content that is personalized, relevant, and on-brand.

– Priya Patel, *Sr. Research Analyst*

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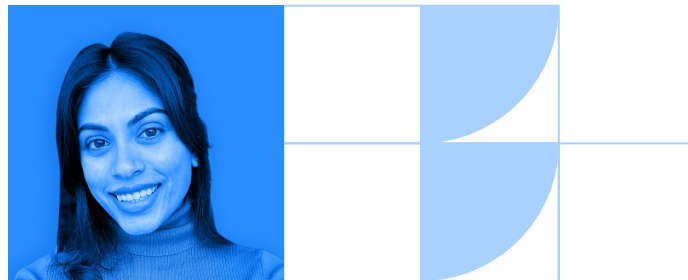
Content Delivery Network delivers ROI for nearly 70% of users within 6 months.

Hosting categories with the fastest time to ROI

Chart legend: ■ <6 mo. ■ 7-12 mo. ■ 13-24 mo. ■ 24-36 mo. ■ 37-48 mo. ■ 48+ mo. ■ Never

Categories (top to bottom): Content Delivery Network (CDN), Reseller Hosting, Managed DNS Providers, Virtual Private Servers (VPS), WordPress Hosting, Cloud Web Hosting, Domain Registration, Managed Hosting, Shared Hosting, Dedicated Hosting

X-axis: 0, 20%, 40%, 60%, 80%, 100%
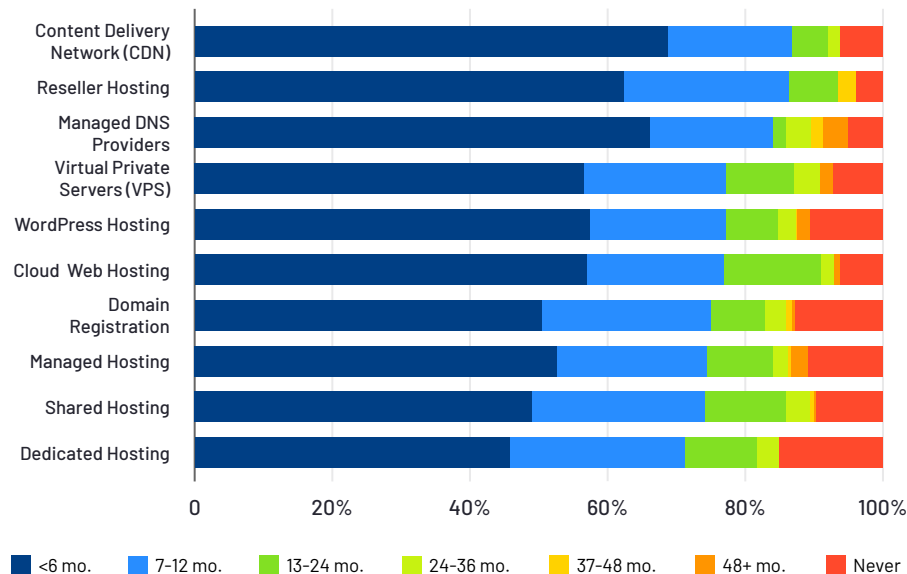
> " Content Delivery Networks (CDNs) boost website performance and reduce server costs, speeding up revenue generation. Reseller Hosting combines lower initial costs with added services like website design and SEO, creating new revenue streams. These advantages make CDN and Reseller Hosting the top solutions in the hosting category for rapid ROI, thanks to their high efficiency and cost-effectiveness.

– Anindita Sengupta, *Sr. Research Analyst*

Source: G2 data, July 1, 2023 to June 30, 2024
Note: List includes categories that received at least 40 reviews with ROI ratings in 2023.

70% of Voice Recognition users see ROI within 6 months, the fastest of any AI category.

AI categories with the fastest time to ROI

Chart: Horizontal stacked bar chart showing time to ROI by AI category (Voice Recognition, Natural Language, AI Image Generators, AI Video Generators, AI Chatbots, AI Writing Assistant, Bot Platforms, Chatbots, Text to Speech, Data Science & ML Platforms). Legend: <6 mo., 7-12 mo., 13-24 mo., 24-36 mo., 37-48 mo., 48+ mo., Never.
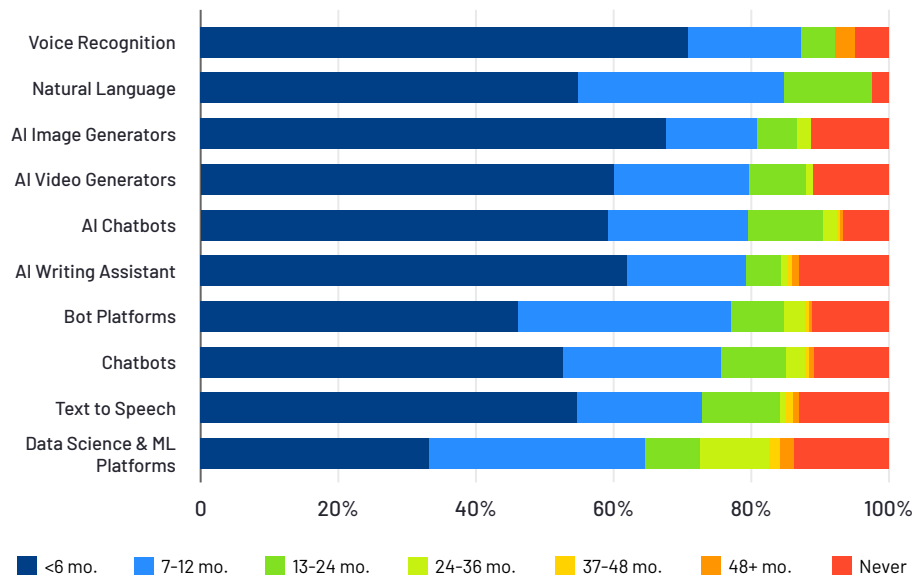
> " When it comes to AI categories, users of voice recognition software are experiencing the fastest time to ROI. With multiple use cases — from call centers to IoT — this application of AI allows users to quickly access data and communicate with customers and users alike.

– Matthew Miller, *Research Principal*

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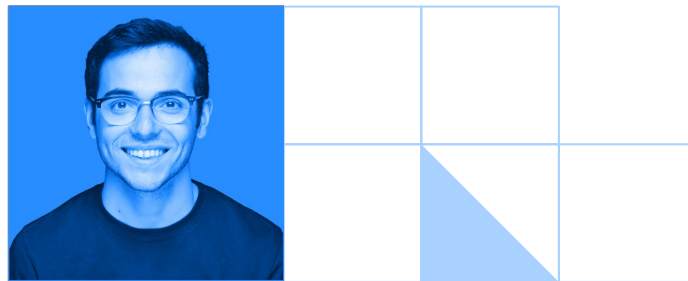
G2's software marketplace grew more than 10% YoY.

Number of software listings on the G2 marketplace 2019-2024
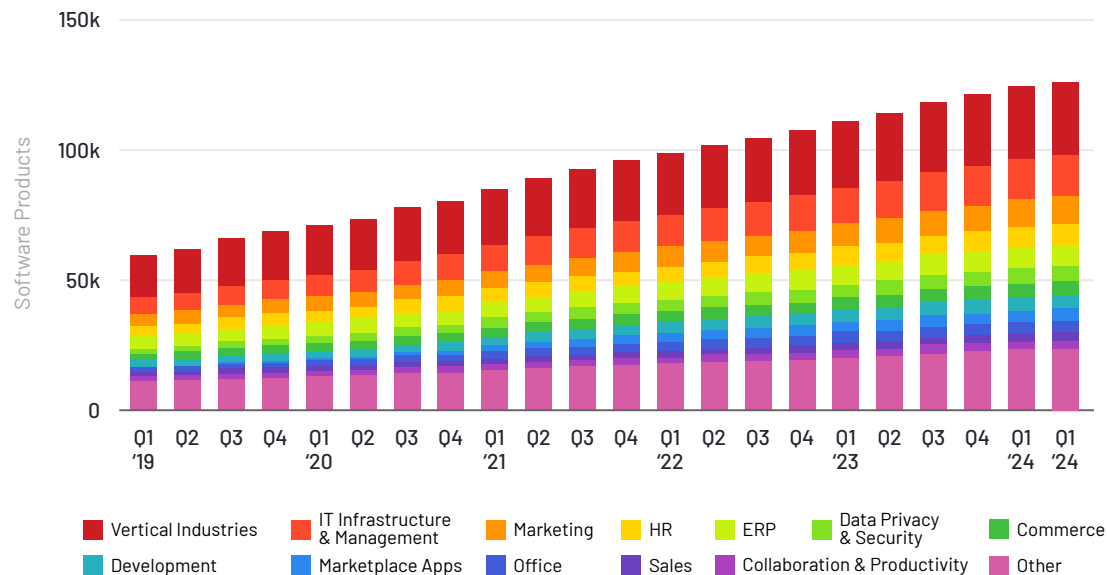
Software has become a linchpin of modern business, with AI storming onto the scene — driving unparalleled innovation across all categories of software.

The impact of AI continues to widen. G2 reviewers are now evaluating AI features and the ROI they have received from AI for products in nearly 200 categories spanning these larger markets.

Source: G2 data

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AI fuels software growth.

G2 added more than 17,000 new products to its marketplace in the past year, but not all categories grew at an equal rate. We examined which spaces grew the fastest, both in the most recent quarter and over the past four quarters.
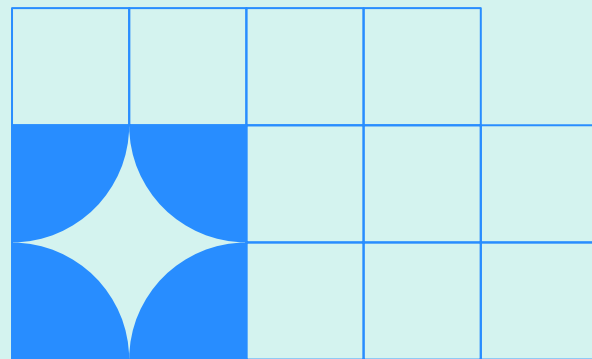
26	**1,676**	**1,883**	**60,564**
Total AI categories	Total AI vendors	Total AI products	Total AI reviews

AI still the fastest-growing software market, growing 38% over the past year.

10 fastest-growing markets, based on new products added

YoY % increase

Market	%
Artificial Intelligence	38%
Design	18%
Governance, Risk & Compliance	14%
IT Management	14%
Marketing	14%
Sales Tools	14%
HR	12%
Security	11%
Supply Chain & Logistics	11%
Development	11%

Source: G2 data, July 1, 2023 to June 30, 2024
"Fastest-growing" includes high-level software categories with 150+ new products added in 2023. Office Management excluded from this report due to taxonomy redesign.

AI remains the fastest-growing software market by far, while Governance, Risk & Compliance and Supply Chain & Logistics joined as new entrants to the top 10 list.

While the AI market grew 38% YoY, this represents a smaller percentage compared to the end of 2023, when it was growing 44% YoY. AI categories actually added slightly *more* new products over the past four quarters — nearly 800 — compared to our last report.

Ultimately, AI software's pace of product growth is moderating relative to its category size. And the steady emergence of new AI products suggests that there is still plenty of opportunity for innovation.

AI software grew 5% in the past quarter alone.

10 fastest-growing markets QoQ, based on new products added

QoQ % increase

Market	QoQ % increase
Artificial Intelligence	5%
Sales Tools	2.7%
Marketing	2.7%
Design	2.6%
IT Management	2.6%
Analytics Tools & Software	2.5%
Supply Chain & Logistics	2.3%
Security	2.3%
Content Management	2.2%
HR	2.1%

Source: G2 data, April 1 to June 30, 2024
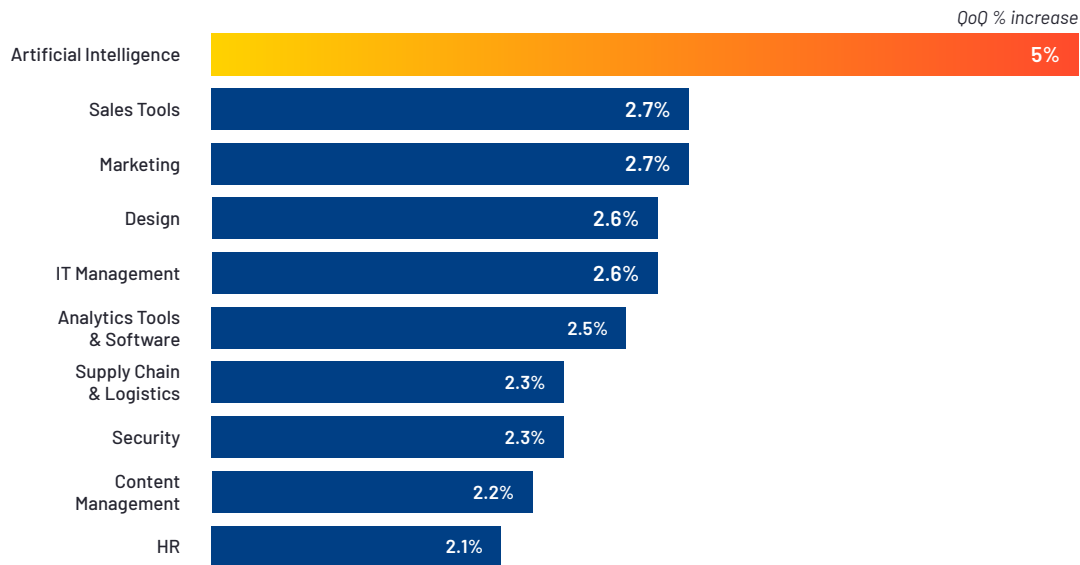
AI still commands the top spot when looking at how much markets grew from Q1 to Q2 2024. Its quarter-over quarter market growth underscores the continued investment in AI offerings.

Sales and Marketing software also showed accelerating growth in the first part of 2024.

When it comes to quarterly growth, Analytics Tools and Content Management software both make an appearance in the top 10.

AI image generators experienced 441% growth over the past year.

10 fastest-growing AI categories, based on new products added

Category	Total product count	YoY % increase
AI Image Generators	92	441%
AI Chatbots	116	252%
AI Code Generation	43	115%
AI Writing Assistant	424	80%
Text to Speech	116	43%
Proofreading	35	40%
Chatbots	528	29%
AI Agents	177	20%
Voice Recognition	143	19%
MLOps Platforms	152	14%

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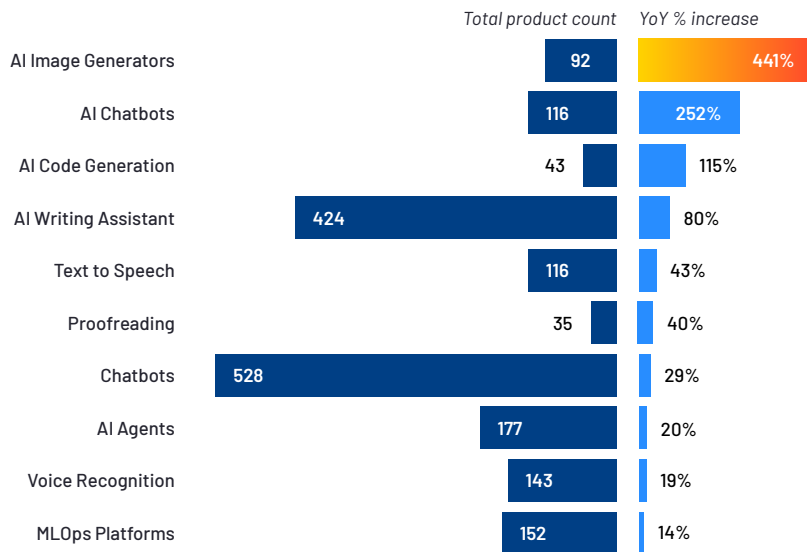
Content creation is at the heart of AI growth. As business users realize the impact and importance of using AI-powered image generators, vendors are quickly creating and honing their offerings to provide tools for scaling media production.

– Matthew Miller, *Research Principal*

✦ **Insight from AI**

Reviewers of AI products had positive things to say about ease of use, content creation, and positive support experiences. However, users also mentioned content creation as a challenge, representing the #1 pain point for users when it came to things they 'dislike.'

Source: G2 data, July 1, 2023 to June 30, 2024.

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Photo Editing grows 30% as demand for AI-powered Design features surges.

10 fastest-growing Design categories, based on new products added

Category	Total product count	YoY % increase
Photo Editing	237	30%
Audio Editing	133	24%
Video Editing	292	21%
3D Modeling	172	19%
Stock Photos	72	18%
Podcast Hosting	75	17%
OTT Platforms	77	17%
Web Design	134	14%
Animation	111	12%
Diagramming	116	11%

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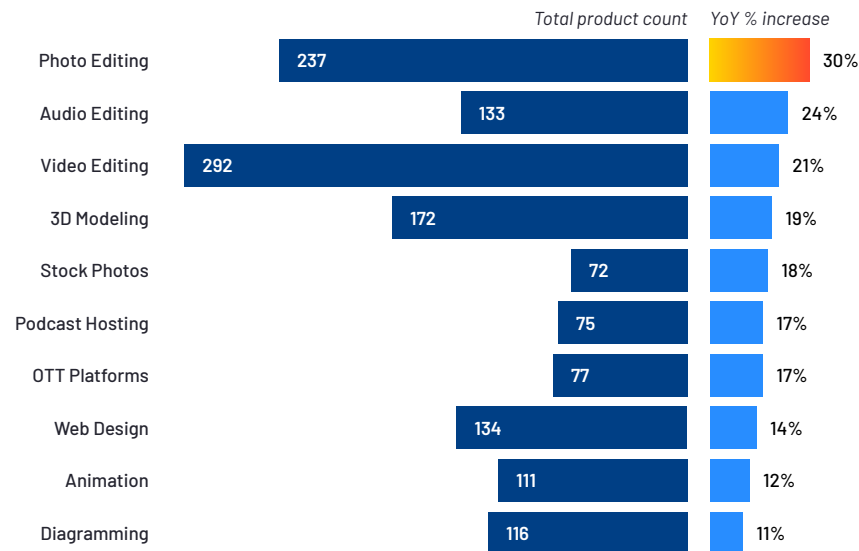
Incorporating visual content into both internal and external facing materials is now essential, making Photo Editing the fasting-growing Design category based on percentage growth of new products. AI-powered photo editing tools lower the barrier to creating high quality visual content efficiently and cost effectively, encouraging adoption into existing workflows.

– Priya Patel, *Sr. Research Analyst*
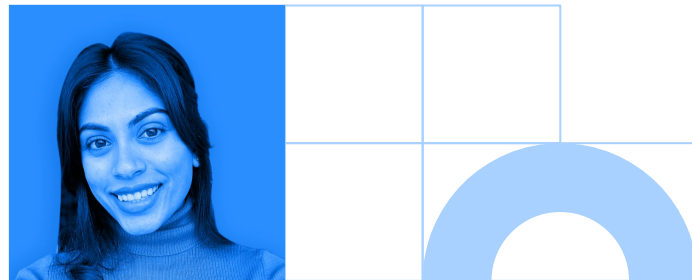
Environmental, Social and Governance Reporting leads GRC market in product growth at 28%.

5 fastest-growing Governance, Risk & Compliance categories, based on new products added

	Total product count	YoY % increase
Environmental, Social and Governance (ESG) Reporting	123	28%
GRC Tools	157	22%
Security Compliance	152	18%
Anti Money Laundering	186	16%
Regulatory Change Management	189	9%

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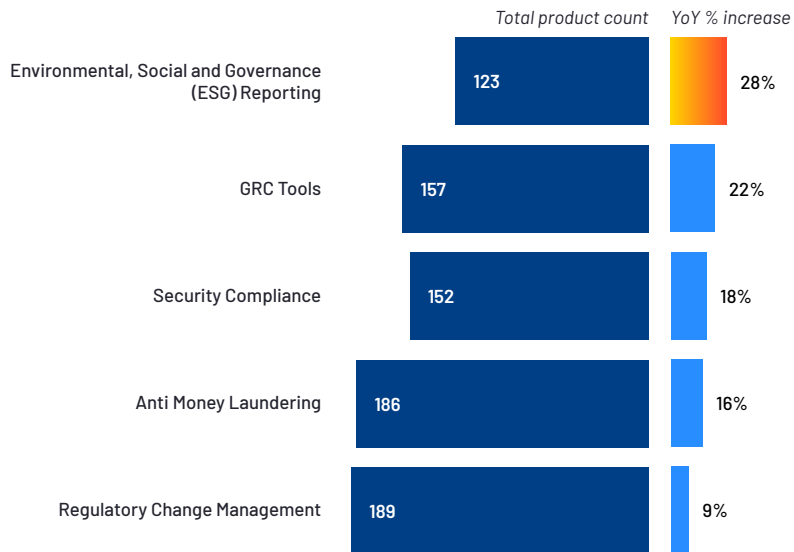
ESG had the highest increase in the number of products, showing that its importance is continuously increasing. The second fastest-growing category was GRC Tools, which includes a broad range of products related to GRC. The growth of GRC Tools reflects the emergence of more atypical GRC products, focusing on either vertical features like insider trading or on very specific functionality such as communication compliance.

– Gabriel Gheorghiu, *Principal Analyst*
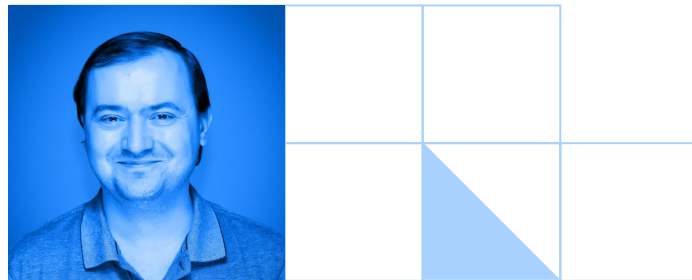
Trending categories by *G2 Momentum score.**

According to G2's Momentum Score analysis, Artificial Intelligence continues to lead all high-level G2 software markets in Momentum score, reflecting AI's continued growth into 2024. Following AI, Government, Risk & Compliance, and Data Privacy moved into the top three markets for strongest Momentum scores across the G2 marketplace.
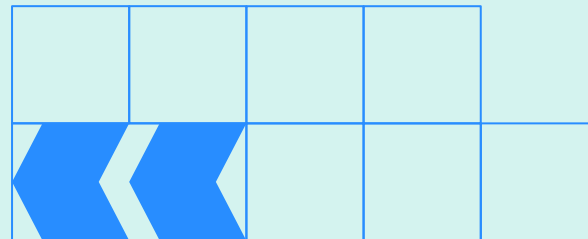
* G2's Momentum score plots what's next

Software isn't ever at a state of rest. G2's proprietary **Momentum Score** identifies categories that are on a high-growth trajectory based on YoY growth in user satisfaction scores, employee growth, and digital presence. It's our measure of which software products are hot and trending.

Unlike the category trends reflected in our quarterly **Momentum Grids**®, the State of Software zooms out to the macro level. These scores are unlike traditional rankings that simply position a product or category where it is today. Rather, they chart where they're *headed.*

AI leads Momentum scoring, with strong employee, review, social, & web growth.

Top software markets by G2 Momentum Score

Market	Score
Artificial Intelligence	9.62
Governance, Risk & Compliance	8.18
Data Privacy	8.02
Security	7.40
Analytics Tools & Software	7.05
IT Management	6.99
Customer Service	6.91
Supply Chain & Logistics	6.52
HR	6.48
IT Infrastructure	6.38

Legend: Employee growth, Review growth, Social growth, Web growth
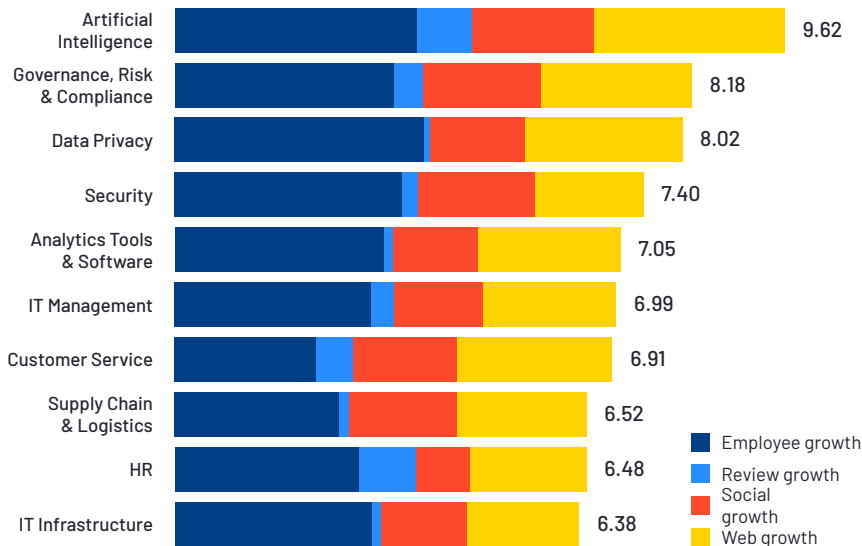
G2 Momentum Scores are calculated on a 10 point scale.
Source: G2 data, July 1, 2023 to June 30, 2024.

✦ Insight from AI

Zooming in on what reviewers like when it comes to AI software, reviewers focused on ease of use, content creation, and positive support experiences with top mentions related to 'ease' (7,103 mentions).

	+ reviews	– reviews
● **easy:**	**28%**	3%
● **support:**	11%	**4%**
● **content:**	9%	3%
● **create:**	8%	2%

As we see in this report, content creation is a key use of AI software. To that end, 'create' and 'content' are the #3 and #4 most mentioned topics for what reviewers like about AI software. For dislikes, content creation remains a challenge, with it being the #1 pain point for users, with 1,503 mentions.

In fast-changing AI market, ChatGPT is the growth champ.

AI products by G2 Momentum Score

Rank	Product name	Main category
1	ChatGPT	AI Chatbots
2	synthesia	Video Editing
3	HeyGen	AI Video Generators
4	MURF.AI	Text to Speech
5	AISEO	AI Writing Assistants
6	Colossyan	Video Editing
7	Fliki	Text to Speech
8	Writesonic	AI Writing Assistants
9	wordtune	AI Writing Assistant
10	GitHub Copilot	AI Code Generation

G2 data, July 1, 2023 to June 30, 2024.

"ChatGPT garnered tremendous user growth and review count since its inception and does not seem to be slowing down.

A look at this top 10 reminds us, again, how closely content and media are tied to AI. It's not long before the question becomes not 'did you use AI to create this?' but 'which AI did you use?'

– Matthew Miller, *Research Principal*
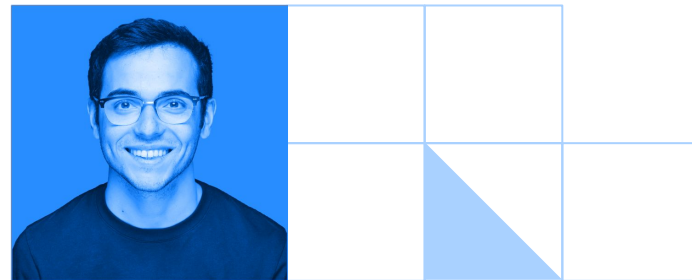
AI product satisfaction among enterprise buyers trails mid-market and SMBs.

Average satisfaction scores, AI categories

	Likelihood to Recommend	Quality of Support	Meets Requirements	Ease of Use	Ease of Setup	Ease of Doing Business	Ease of Admin
Small Business	**92%**	88.7%	89.3%	90.8%	**90.4%**	91.3%	**90.4%**
Mid-Market	91.8%	**89.6%**	**90%**	**91.3%**	**90.4%**	**91.9%**	90.1%
Enterprise	91.5%	88.6%	89.3%	90.9%	89.6%	90.1%	88.1%

In G2's Trends for 2024, we predicted that Enterprises would face more hurdles in AI adoption — and we were right. In software reviews on G2, Enterprise users generally give AI average or below average scores for every satisfaction metric.

AI seems to be impressing mid-market buyers, who rate AI products highest on every satisfaction metric except ease of admin. However, SMB buyers are slightly more likely to recommend these offerings to a friend or colleague.

Source: G2 data, July 1, 2023 to June 30, 2024.

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Vanta leads GRC products in Momentum.

GRC products by G2 Momentum Score

Rank	Product name	Main category
1	Vanta	Security Compliance
2	scytale	Cloud Compliance
3	Scrut Automation	Security Compliance
4	SPRINTO	Cloud Compliance
5	DRATA	Cloud Compliance
6	hyperproof	Enterprise Risk Management (ERM)
7	trustero	Security Compliance
8	AUDITBOARD	Enterprise Risk Management (ERM)
9	certa	Third Party & Supplier Risk Management
10	pirani	Operational Risk Management

" Security and cloud compliance products have the highest Momentum Scores, as companies are more aware of security threats and most of their solutions are in the cloud. At the same time, ERM is still important for companies that take a holistic approach to compliance instead of focusing on a specific type of risk, such as security or third-party risk.

– Gabriel Gheorghiu, *Research Principal*

Source: G2 data, July 1, 2023 to June 30, 2024

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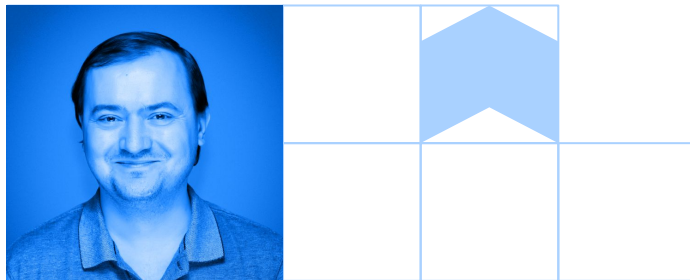
Persona is #1 in Data Privacy market Momentum.

Data Privacy products by G2 Momentum Score

Rank	Product name	Main category
1	persona	Identity Verification
2	sumsub	Identity Verification
3	HYPERVERGE	Identity Verification
4	osano	Data Privacy Management
5	iDenfy	Identity Verification
6	evervault	Data De-Identification
7	snowflake	Data Warehouse
8	MineOS	Data Privacy Management
9	DIDOMI	Consent Management Platform (CMP)
10	usercentrics	Consent Management Platform (CMP)

Source: G2 data, July 1, 2023 to June 30, 2024

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As organizations grapple with the continuously evolving threat landscape, identity verification products remain a necessary first line of defense in any security program. To both reduce losses from fraud as well as protect their customers and thus, their company's brand, businesses are turning to identity verification and data privacy management.

– Brandon Summers-Miller, *Sr. Market Research Analyst*

21
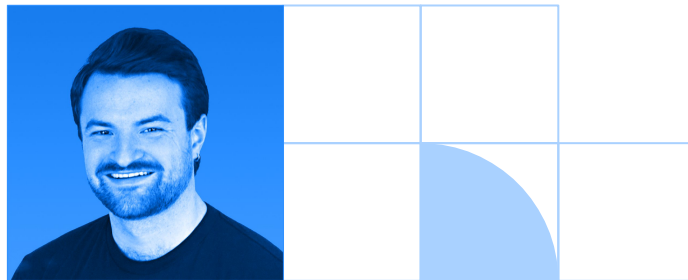
NinjaOne tops Security Momentum leaders list.

Security products by G2 Momentum Score

Rank	Product name	Main category
1	ninjaOne	Endpoint Management
2	WIZ	Cloud Security Posture Management (CSPM)
3	GitGuardian	Static Application Security Testing (SAST)
4	Vanta	Security Compliance
5	NordPass	Password Manager
6	Action1	Patch Management
7	scytale	Cloud Compliance
8	Scrut Automation	Security Compliance
9	zluri	SaaS Operations Management
10	SuperOps.ai	Remote Monitoring & Management (RMM)

Source: G2 data, July 1, 2023 to June 30, 2024

"

The momentum seen among solutions that are related to compliance and validation is significant. Increased legislation and requirements are driving innovation and adoption across enterprise and SMB customers. Additionally, the rise of solutions that help with posture and application configuration indicate that the market is gravitating towards validation as well as security control needs.

– Dr. Chase Cunningham, *VP, Security Market Research*

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# Canva ranks first among Analytics tools in Momentum Score.

Analytics Tools & Software products by G2 Momentum Score

Rank	Product name	Main category
1	Canva	Display Ad Design
2	HEX	Analytics Platforms
3	JASPERSOFT	Embedded Business Intelligence
4	SearchUnify	Enterprise Search
5	AlphaSense	Financial Research
6	Power BI	Analytics Platforms
7	sigma	Analytics Platforms
8	IBM SPSS Statistics	Statistical Analytics
9	GURU	Knowledge Base
10	AgencyAnalytics	Marketing Analytics

"

Analytics tools come in many flavors, all helping users analyze their business data. When it comes to G2 Momentum Score, Canva came out on top, showcasing the importance of spiffy design and user friendliness for displaying and analyzing data. With a range of other analytics products on the list, the lesson is clear: find the right software for your use, industry, and problem. Don't think there is a one-size-fits-all tool that will solve every problem for everyone.

– Matthew Miller, *Research Principal*

*Source: G2 data, July 1, 2023 to June 30, 2024*

23
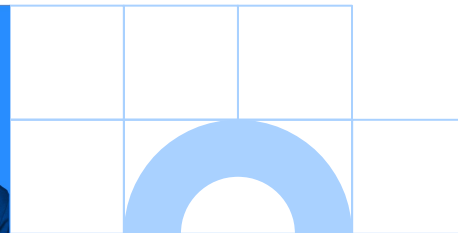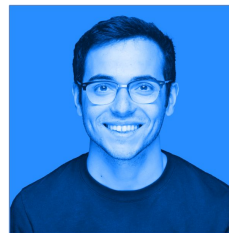
Vertically-focused software and established categories still dominate buyer traffic.

More than 90 million people—including employees at all Fortune 500 companies—use G2 annually to find the software and services their organizations depend on. We examined which categories are getting the most attention from buyers.
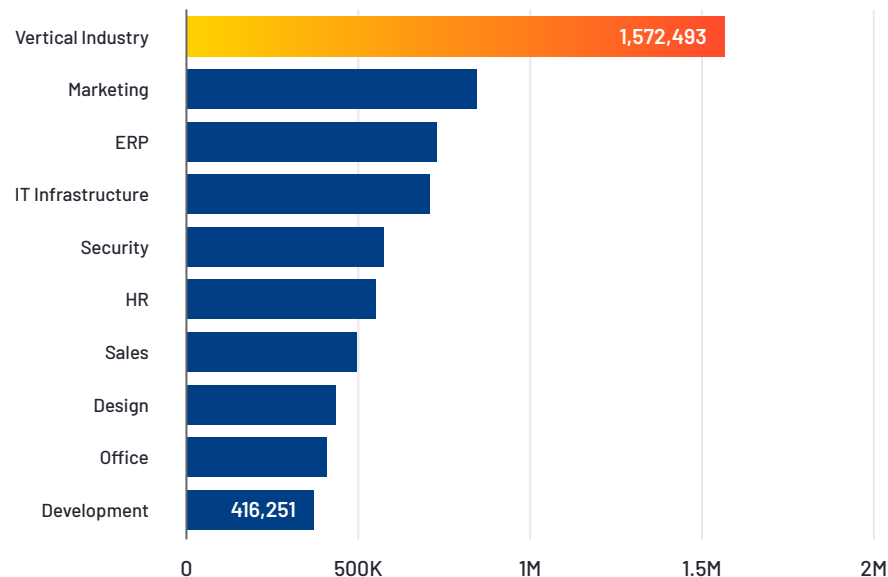
Over the last four quarters, vertical industry categories continued to draw the most buyer traffic, while established categories like Marketing Automation and ERP Systems also attracted significant interest. Notably, Security moved into the top five markets for traffic.
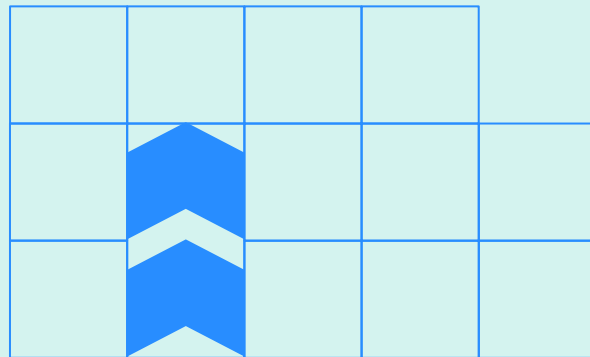
Vertical software retains #1 spot as most visited category.

Unique pageviews of G2 categories

Category	Unique pageviews
Vertical Industry	1,572,493
Marketing	
ERP	
IT Infrastructure	
Security	
HR	
Sales	
Design	
Office	
Development	416,251

X-axis: 0, 500K, 1M, 1.5M, 2M

> Vertical industry categories continue to command the largest share of G2 buyer traffic. The promise of productivity lifts from AI is enticing buyers across vertical markets. Fundraisers can target major gifts more confidently, healthcare providers can detect life-threatening diseases sooner, and educators can provide unprecedented levels of personalized learning for students at any level. Even governments, infamously stubborn on adopting modern technology, are beginning to experiment with how AI can transform public services.
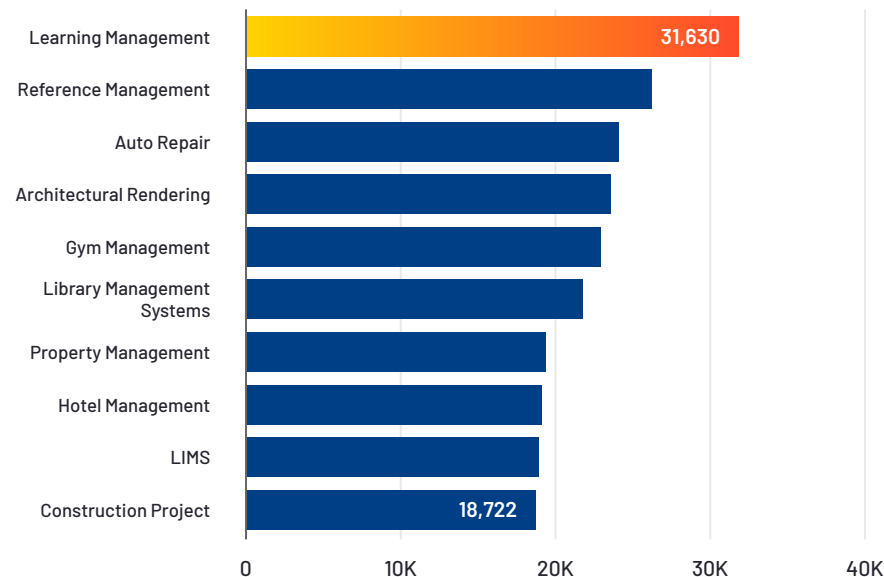
– Dominick Duda, Sr. *Research Analyst*

Learning-related categories lead vertical market in pageviews.

Top Vertical Industry categories by traffic

Category	Traffic
Learning Management	31,630
Reference Management	
Auto Repair	
Architectural Rendering	
Gym Management	
Library Management Systems	
Property Management	
Hotel Management	
LIMS	
Construction Project	18,722

(Chart x-axis: 0 — 10K — 20K — 30K — 40K)

> As previously predicted, educational tools have a clear dominance, indicating a solid market presence and continued growth in vertical technology, with Learning Management Systems (LMS) and Reference Management occupying the top spots. The current state of software demands continued innovation for academic software solutions. There is an opportunity for growth in an emerging market like Library Management Systems with just over 20,000 unique views.

– JaKayla D. Lathon, *Research Analyst*

*Reference management software aids students, research-oriented professionals and more for sourcing others' material by citing accurately and efficiently.

Marketing Automation is still the traffic leader among Marketing categories.

Top Marketing categories by traffic

Category	Traffic
Marketing Automation	58,789
Customer Data Platform	
Email Marketing	
SMS Marketing	
Event Management Platforms	
Buyer Intent Data Providers	
SEO Tools	
Influencers Marketing Platforms	
Social Media Management	
Affiliate Marketing	19,151
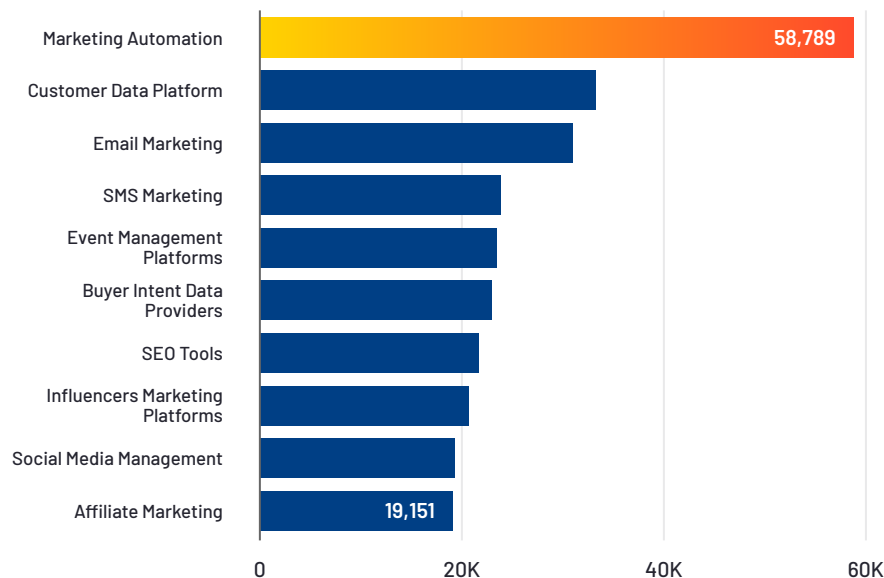
> Marketing Automation software truly is a wonder tool. Its capabilities extend to not only standardizing marketing efforts but also providing efficiency, productivity, and scalability to campaigns that would take two, if not three, times as long to complete otherwise. In the age of consolidation and AI, this is a welcome relief for marketers — making these traffic numbers speak for themselves.

– Victoria Blackwell, *Research Principal*

Source: G2 data, July 1, 2023 to June 30, 2024

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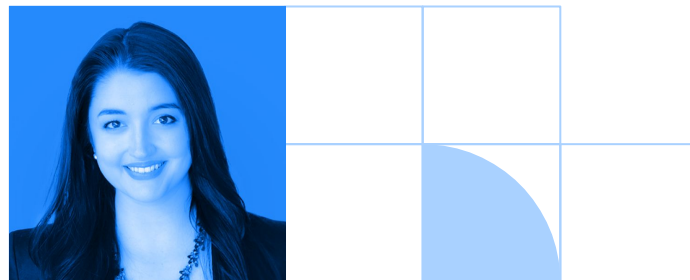
ERP Systems is most visited ERP category.

Top ERP categories by traffic

Category	Traffic
ERP Systems	107,694
Accounting	
Project Management	
Expense Management	
AP Automation	
CMMS	
Mileage Tracking	
Order Management	
Quality Management (QMS)	
Budgeting & Forecasting	14,566

(x-axis: 0, 25K, 50K, 75K, 100K, 125K)
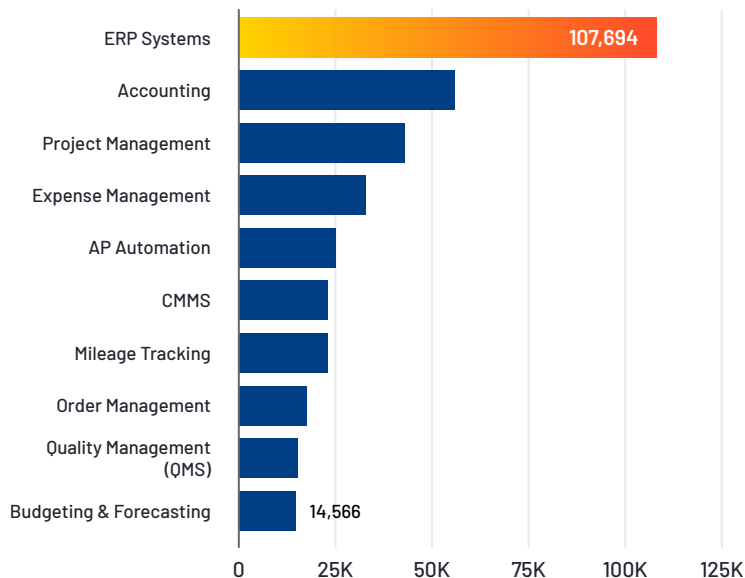
"Core ERP systems remain the most popular category in the ERP space because this type of software combines multiple types of functionality, such as accounting, project management, or quality management. While ERP systems tend to be expensive, it may be even more costly to invest in separate solutions for each of these features. Accounting and project management remain popular because these solutions can benefit smaller companies and more focused use cases. Furthermore, point solutions for expense management, AP automation, or budgeting and forecasting can enhance the standard features delivered by ERP and accounting software.

– Gabriel Gheorghiu, *Research Principal*

Source: G2 data, July 1, 2023 to June 30, 2024
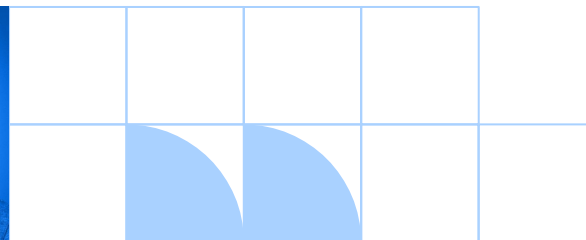
Remote Desktop outperforms other IT Infrastructure categories in traffic.

Top IT Infrastructure categories by traffic

Category	Traffic
Remote Desktop	68,670
Cryptocurrency Exchanges	
Operating System	
Cryptocurrency Mining	
Cryptocurrency Wallets	
Relational Databases	
Graph Databases	
Data Warehouse	
iPaaS	
Application Performance Monitoring (APM)	16,609

(x-axis: 0, 20K, 40K, 60K, 80K)
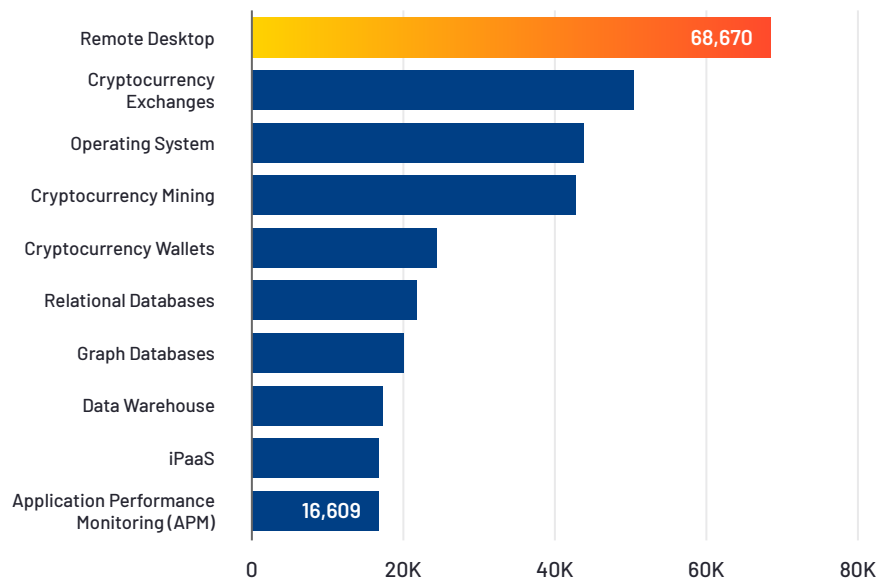
"By enabling secure and efficient remote access to systems, remote desktop software enhances productivity and collaboration in hybrid and remote work environments. This makes it a critical asset for businesses aiming to maintain operational continuity and support their distributed workforce. The significant traffic numbers highlight the growing demand and essential nature of these solutions in modern IT strategies.

– Anindita Sengupta, *Sr. Research Analyst*

Source: G2 data, July 1, 2023 to June 30, 2024

29
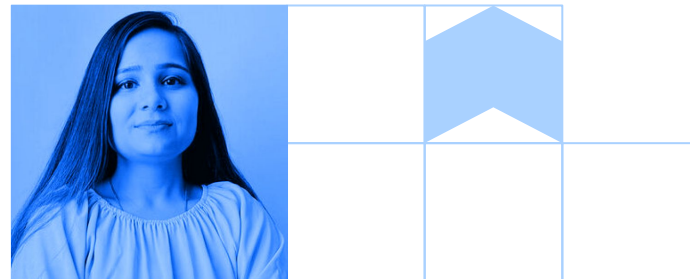
Firewall Software holds firm lead among most-visited Security categories.

Top Security categories by traffic

Category	Traffic
Firewall Software	29,884
Antivirus	
Identity & Access Management (IAM)	
Vulnerability Scanner	
Endpoint Detection & Response (EDR)	
Patch Management	
Static Code Analysis	
Multi-Factor Authentication (MFA)	
Web Application Firewall (WAF)	
Single Sign-On (SSO)	12,141
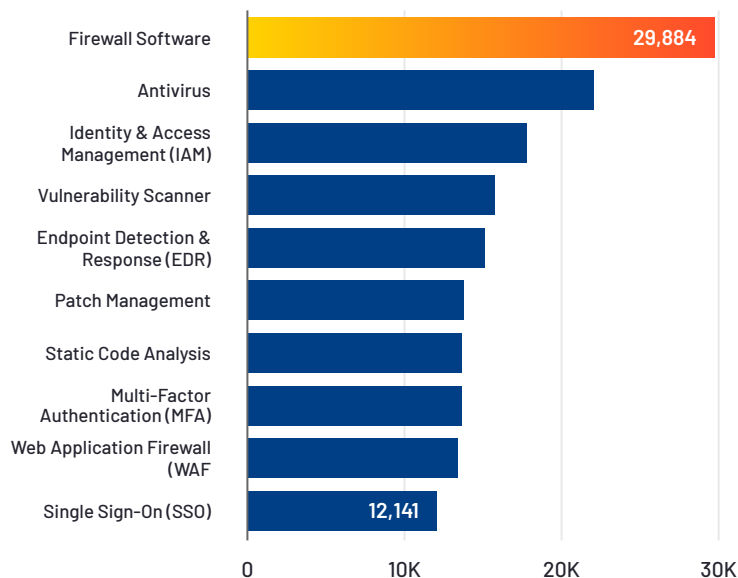
> "When it comes to network security, firewall technology continues to be a cornerstone. Modern firewalls go beyond basic packet filtering to provide comprehensive security features such as intrusion prevention, application control, and advanced threat detection. They enable organizations to safeguard sensitive data, ensure compliance with regulatory standards, and maintain operational continuity. By integrating seamlessly with other security solutions, firewalls — while a legacy technology — are an indispensable asset for any business looking to protect its digital infrastructure.

– Dr. Chase Cunningham, *VP, Security Market Research*
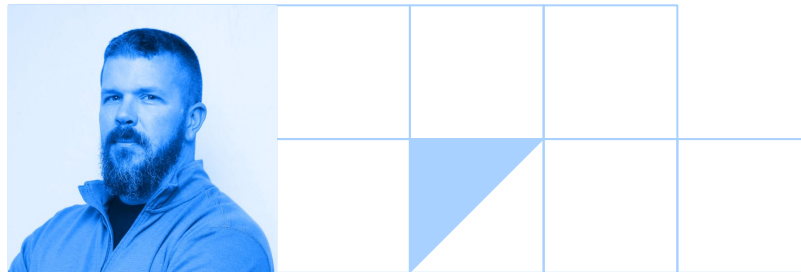
Course Hero is most-trafficked Education product.

Most-visited Education product profiles

Rank	Product name	Main category
1	Course Hero	Study Tools
2	Quizlet	Study Tools
3	coursera	Online Course Providers
4	duolingo	Language Learning
5	PLURALSIGHT	Technical Skills Development
6	CANVAS	Learning Management System (LMS)
7	LinkedIn Learning	Online Course Providers
8	Khan Academy	Online Course Providers
9	Google Classroom	Learning Management System (LMS)
10	Studypool	Study Tools

"With the job market starting to cool down, workers are feeling the pressure to upskill so they can gain a competitive edge and stand out to prospective employers. All the products in this list support continuing education efforts, and include well-known brands like Coursera, LinkedIn Learning, and Duolingo. The AI boom is also leading more workers to seek out courses and other educational resources to understand this rapidly advancing technology and how to incorporate it into their current or desired role; otherwise, they risk being left behind.

– Dominick Duda, *Sr. Research Analyst*

Source: G2 data, July 1, 2023 to June 30, 2024
List eligibility based on product main category being within the high-level parent

31
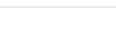
HubSpot Marketing Hub tops list of most-visited Marketing profiles.

Most-visited Marketing product profiles

Rank	Product name	Main category
1	HubSpot Marketing Hub	Marketing Automation
2	Kahoot!	Audience Response
3	SEMRUSH	SEO Tools
4	Birdeye	Online Reputation Management
5	G2	Technology Research Services
6	instantly	Email Marketing
7	Hootsuite	Social Media Management
8	sproutsocial	Social Media Suites
9	genially	Content Creation
10	ActiveCampaign	Marketing Automation

" A consistent theme ringing through these 10 products is a contribution to brand maintenance. This is something that should be top of mind for all marketers when it comes to executing campaigns, creating content, and understanding buyers.

– Victoria Blackwell, *Research Principal*

32
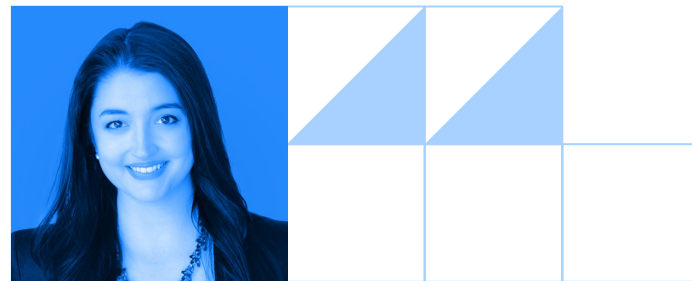
TallyPrime is most-trafficked ERP profile.

Most-visited ERP product profiles

Rank	Product name	Main category
1	TallyPrime	Discrete ERP
2	NETSUITE	ERP Systems
3	asana	Project Collaboration
4	sage Intacct	Accounting
5	ramp	Spend Management
6	SAP Concur	Expense Management
7	Expensify	Expense Management
8	INTUIT quickbooks	Accounting
9	odoo	ERP Systems
10	Acumatica	ERP Systems

TallyPrime's popularity among SMB makes it no surprise to be the most visited ERP product on G2. The continued expansion of NetSuite to serve different use cases across enterprises from ERP to core HR make it a popular offering as well. It's also worth noting the strong buyer interest in expense management solutions with the return of business travel and increased expense scrutiny .

– Gabriel Gheorghiu, *Research Principal*
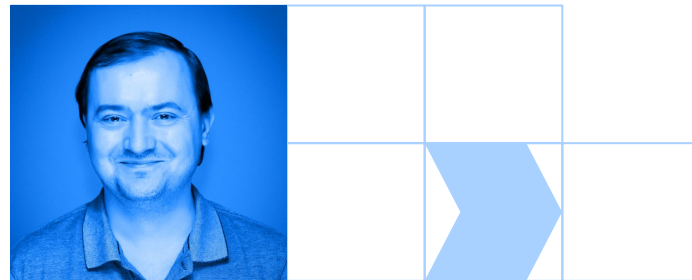
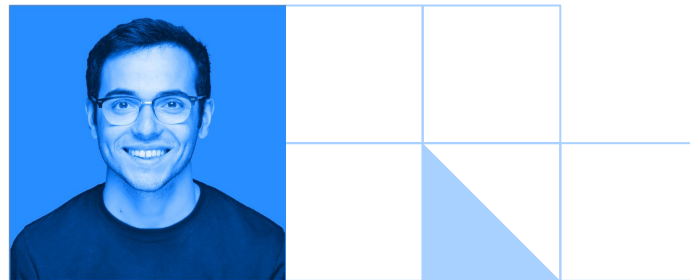# HeyGen claims most AI Product page views.

Most-visited AI product profiles

Rank	Product name	Main category
1	HeyGen	AI Video Generators
2	grammarly	AI Writing Assistant
3	Writesonic	AI Writing Assistant
4	Otter.ai	Voice Recognition
5	Midjourney	AI Image Generators
6	D-ID	AI Video Generators
7	Jasper	AI Writing Assistant
8	Fliki	Text to Speech
9	MURF.AI	Text to Speech
10	ChatGPT	AI Chatbots

G2 buyers continue to be fascinated by the rise of generative AI technology. When looking at the AI products that saw the most profile traffic on G2 in the last four quarters, every product has a generative AI component.

Despite ChatGPT cementing its status as a household AI name, it wasn't the most-visited profile — more buyer visits went to the profile for HeyGen, the AI video generation platform.

– Matthew Miller, *Research Principal*

Source: G2 data, July 1, 2023 to June 30, 2024
List eligibility based on product main category being within the high-level parent

34

1Password is most-trafficked Security Product.

Most-visited Security product profiles

Rank	Product name	Main category
1	1Password	Password Manager
2	ninjaOne	Endpoint Management
3	DRATA	Cloud Compliance
4	sonarqube	Static Code Analysis
5	CROWDSTRIKE	Endpoint Protection Suites
6	ASocks	Proxy Network
7	WIZ	Cloud Security Posture Management (CSPM)
8	SPRINTO	Cloud Compliance
9	Microsoft Entra ID	Identity and Access Management (IAM)
10	SentinelOne	Endpoint Detection & Response (EDR)

Source: G2 data, July 1, 2023 to June 30, 2024
List eligibility based on product main category being within the high-level parent

"

Organizations often don't have the human power necessary to develop, maintain, and monitor their security programs' effectiveness. While buyers continue to seek out fundamental products like password managers, there is an increasing interest in all-in-one security platforms and more comprehensive, multi-use case security products.

– Brandon Summers-Miller, *Sr. Research Analyst*

35
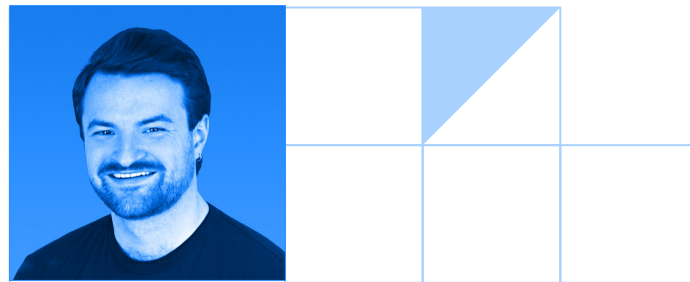
Methodology.

G2's State of Software report examines trends from its B2B software marketplace, based on proprietary data across 2.7 million+ trusted reviews, 180,000+ products and services, 2,100+ categories, and 90 million annual visitors. Insights are based on G2 data collected between July 1, 2023 and June 30, 2024, unless otherwise noted, to reflect trends over the past year observed on G2.
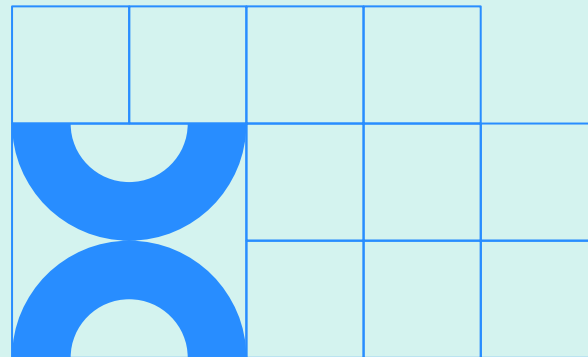
Plug into the pulse of software.

G2 is the place you go for software. But it's also the place you go for software insights. With over 180,000 product and services profiles, 2.7 million verified user reviews, and 90 million annual visitors, G2 offers an unmatched depth and breadth of data on the world of B2B software. And it's all rooted in authentic customer voice and real buying behavior. With this data, we're able to provide unique insight into the indicators that define what's happening across the software landscape right now.

This edition of the State of Software zeroes in on key indicators derived from our data through Q2 of this year. To map what's driving market shifts, we tapped into AI to analyze buyer sentiment trends. We also examined how buyer satisfaction with AI software differs depending on company size. Once again, we dug into traffic trends and value too, parsing out which segments are drawing the most interest and delivering ROI fastest (and slowest).

On behalf of G2's Market Research team, we hope this edition helps you not only stay ahead on the latest trends in B2B SaaS, but also informs your go-to-market strategy, positioning your organization for continued growth.

– Shaun Bishop, G2 Market Research

G2.com Marketplace activity yields unparalleled insight into the dynamics shaping B2B software and services.

37M+
North America

26M+
EMEA

27M+
APAC
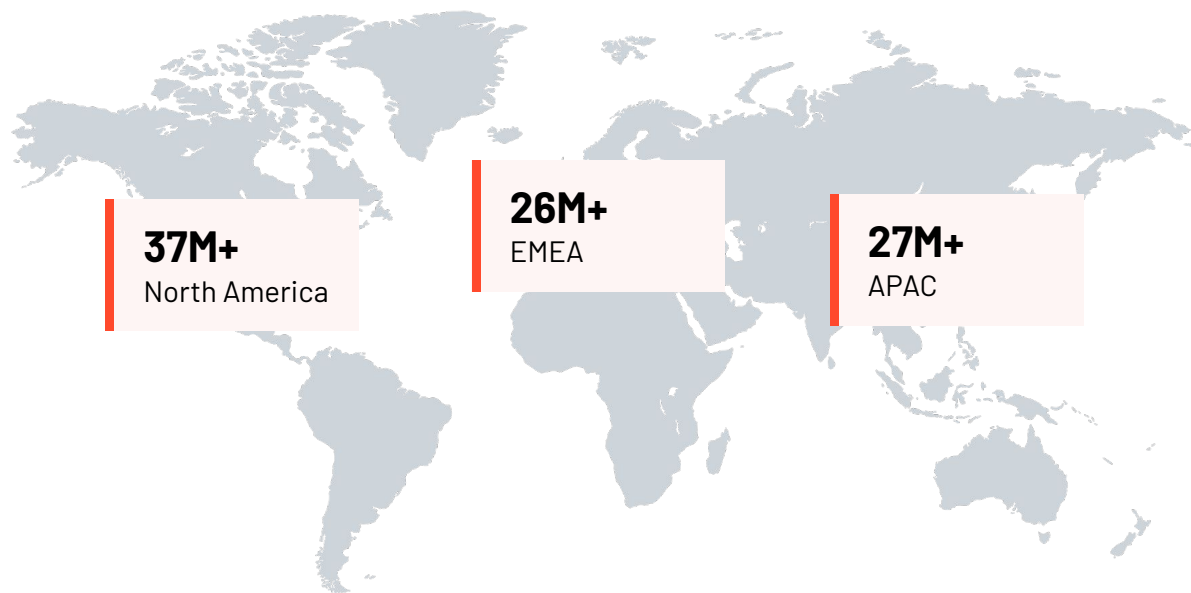
90M+ Global annual software buyers

180K+ Products & services

2.1K+ Categories

2.7M+ Authenticated B2B user reviews

Source: G2 data

38

G2 offers buyers valuable insight into the real experience of their peers with over 2.7 million B2B software and services reviews.

Total G2 reviews by quarter
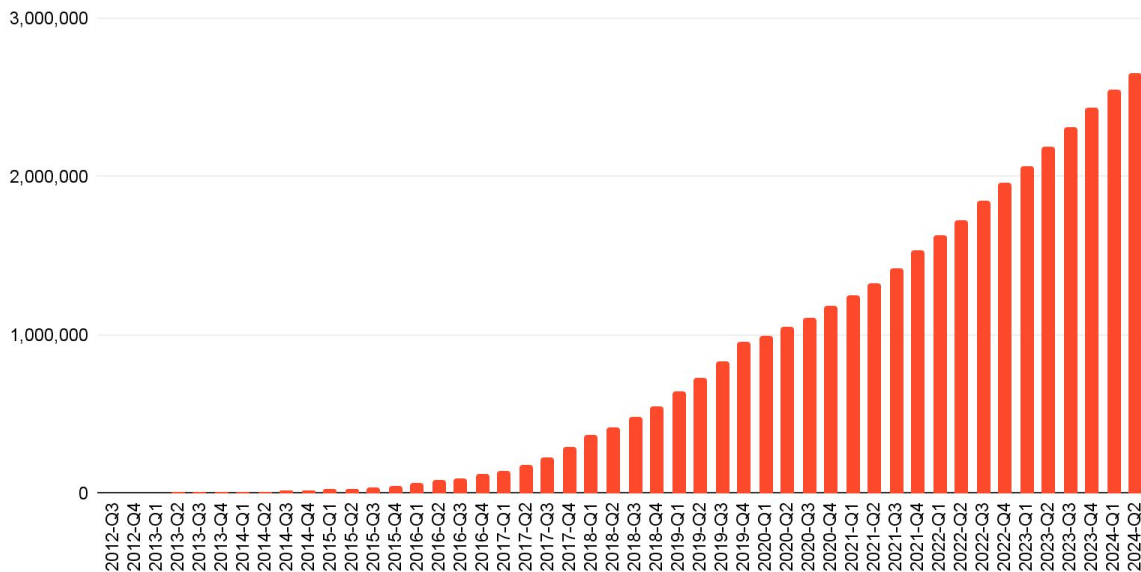
G2 is the world's largest and most trusted software marketplace. More than 90 million people annually — including employees at all Fortune 500 companies — use G2 to make smarter software decisions based on authentic peer reviews. Thousands of software and services companies of all sizes partner with G2 to build their reputation and grow their business — including Salesforce, HubSpot, Zoom, and Adobe.

To learn more about where you go for software, visit **www.G2.com** and follow us on **LinkedIn**.

Source: G2 data

What's next.

Stay tuned for future editions of the State of Software report. Please let us know what you liked from this report or would like to see in the future by emailing research@g2.com.

To get insights from the G2 team sent straight to your inbox every month, sign up for the G2 Tea newsletter.

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