the science of B2B

2026 B2B Buyer Experience Report:

The Secret Life of B2B Buyers

the science of B2B

Acknowledgments

We're grateful to our research partners for the 2026 Buyer Experience study and report, MarketOne, LeadFabric, and Green Hat, for their partnership in expanding the scale and rigor of this research.

About This Report

This report distills the central findings and Go-To-Market implications from the 2026 Global B2B Buyer Experience study, based on responses from 4,611 recent B2B buyers. Readers looking for a deeper analysis of the findings can access the full 2026 Global B2B Buyer Experience Report. Additional reports providing expanded analysis of key topics, as well as regional findings for APAC, Continental Europe, and the UK & Ireland, are also available separately. Since its launch in 2023, the study has grown from just under 1,000 surveyed B2B buyers to a cumulative total of 14,196, all of whom participated in an organizational purchase of at least $25,000 within the previous two years.

Read the full 2026 Global B2B Buyer Experience Report



Executive Summary

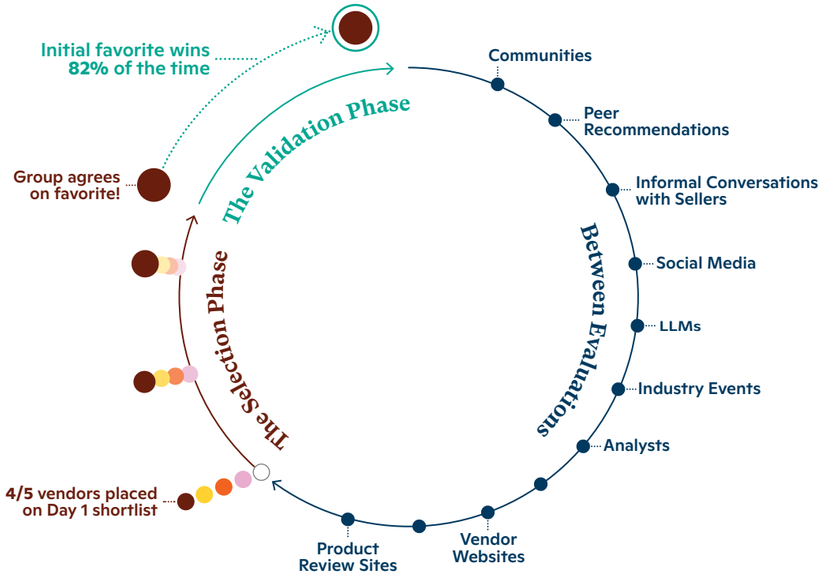
Our prior research showed that B2B buying groups reach consensus on a favorite vendor before they ever talk to a seller, and that consensus favorite wins the deal about eight in ten times. That core truth holds again this year, as it has every year of this study. What is new is a fuller account of how and when that consensus forms, and clear evidence of how little LLMs have to do with forming it, both of which challenge the conventional wisdom about discovery-driven buying and the disruptive role of AI as a research tool.

This year's global study of B2B buyers found that:

- **Buyers are not blank slates.** The average buying-group member is about 40 years old, and roughly 70% have already participated in six or more purchases in the category. More than 85% of purchases occur in Established or Maturing categories, and most vendors buyers evaluate have been around for a decade or more.
- **Buyers are never really out-of-market.** This year's study reveals that target audiences are never really out-of-market. Instead, buyer personas inside target accounts are embedded in complex networks of information sources, both human and digital. Ninety-six percent of buyers keep up with vendors and solutions relevant to their careers outside of active evaluations. Crucially, vendor preferences evolve between evaluation cycles, not just during them.
- **Buying journeys are about deliberation, not discovery.** By the time a new evaluation begins, 94% already have established opinions about which vendors deserve consideration, and 71% start with at least two different vendor preferences represented across the buying group.
- **Agreeing on a category's value is often harder than picking a vendor.** More than half of buyers (56.4%) say gaining agreement that the category is worth the investment is harder than choosing the vendor. The challenge becomes even more pronounced in journeys that end without a purchase (64.4%), and no buying role reports greater difficulty than financial ratifiers (59.5%).
- **As in past years, buying groups rarely change their minds.** 91.4% of buying groups rank their shortlist before ever speaking with a seller, and the vendor they rank first wins the business 82% of the time.
- **AI is a product requirement, not a discovery tool.** LLMs are just one of many resources buyers rely on during evaluations, with usage declining from 94% to 81% this year. Only 26% use them to discover new vendors. AI's greatest influence is on what buyers purchase, not how they research: 80% of purchases involved AI capabilities, encouraged or mandated in most evaluations.

The B2B Buyer Journey:

The Modern Homunculus



Between Evaluations

- **96%** of buyers stay current on solutions and vendors in categories relevant to their careers outside of active evaluations
- **71%** of buyers say their view of vendors changed somewhat or significantly between cycles

The Selection Phase

- **4 out of 5** buyers evaluate are placed on the shortlist from Day 1
- **71%** of buying groups enter with two or more vendor preferences already represented among members on Day 1 of the buying journey
- **92%** of eventual winners are on the shortlist from Day 1 of the buying journey
- **85%** of buyers set or mostly set their purchase requirements before any seller contact
- **91%** of buying teams rank their shortlist in order of preference before reaching out to sellers

The Validation Phase

- First contact with sellers happens 59% of the way through the journey
- **82%** of buyers initiate contact with sellers themselves
- **77%** of buyers contact the group's favorite vendor first
- **82%** of the time, the vendor ranked first at the end of the Selection Phase wins the business

1. Experienced Buyers Begin Journeys with Existing Views

- **Inherited disagreement is the norm.** 71% of buying groups enter with two or more vendor preferences already represented among members; 24.5% start aligned on a single vendor; just 4.2% enter without any opinion on which vendors are worth considering.
- **Buyers are seasoned, not first-timers.** The average buying-group member is about 40 years old regardless of role, and buying groups average 8 to 9 prior purchases in the category before the current evaluation even begins.
- **Vendors are rarely new, either.** 85%+ of purchases occur in Established or Maturing categories, and most vendors buyers evaluate have been around for decades. Even in software, the most volatile segment, roughly 90% are at least a decade old and more than 60% are older than 15 years.

2. Vendor Opinions Evolve Between Buying Cycles

- **Buyers keep up with the market between evaluations.** Ninety-six percent say they continue following vendors and solutions relevant to their careers even when no evaluation is underway.
- **The future shortlist is built outside of active evaluations.** Seventy-one percent of buyers say their view of vendors changed somewhat or significantly between cycles, and 94% enter a new evaluation with established opinions about which vendors deserve consideration. That pattern holds across every buying role, including supporting functions (90% to 98% with no statistically reliable difference between roles). By the time an evaluation begins, 92% of eventual winners are on the initial shortlist.

3. Selection Is Deliberation; Validation Is a Stress Test

- **Sellers enter late.** Buyers contact sellers 59.2% of the way through a 10.3-month cycle, after 91.4% have already ranked a shortlist.
- **The frontrunner usually wins.** The pre-contact favorite wins the business 82% of the time, making Validation more of a stress test than fresh competition.
- **Switches are rational, not political.** When buyers do switch from their original favorite, 41% cite a change in fit, 17% cite price, and 15% cite security or compliance concerns — less than 2% blame a shift in internal support after seller contact began.

The Never-ending Journey: *What We Know About How B2B Buyers Stay Current Between Journeys shape buying*

The Death of Discovery: *Why "Discovery" Is Not an Important Part of B2B Buying*

It's Nobody's First Rodeo: *B2B Buying Groups Are Experienced and Opinionated*

The Great AI Shortcut (That Wasn't): *The Real Role of LLMs in B2B Buying*

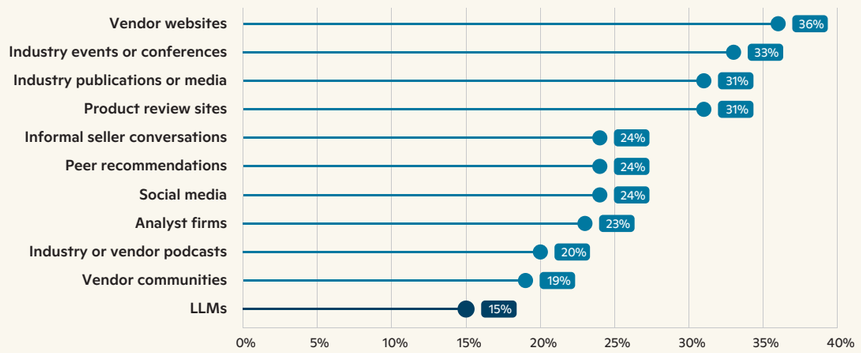
4. LLMs Have Not Displaced Established Sources of Influence

- Buyers are using LLMs less during the buying process. LLM usage fell from 94% of buyers to 81% this year, and only 26% say they use them to discover new vendors.
- The ways buyers stay informed haven't changed much. LLMs are just one of many inputs buyers use to stay current. Vendor websites, industry events, publications, review sites, and peer conversations all rank ahead of LLMs, which are cited by just 15% of buyers.
- The strongest influences are still the ones buyers bring with them. During the Selection Phase, buyers cite their own knowledge and conversations with teammates as more influential than any external source, including LLMs.
- LLMs have not reduced direct engagement with vendors and their content. Despite concerns that AI would disintermediate buyers from vendors, the volume of buyer interaction has remained remarkably consistent.



Channels Buyers Use to Stay Current (Multi-Select)

LLMs are one of many



Buyers could select more than one channel, so percentages do not sum to 100%.

- LLM trust grows with prompting effort. Buyers who report investing more effort in refining and iterating on prompts also report higher levels of trust in LLM outputs. Nearly half (46.6%) rate their prompting effort as high, suggesting confidence in the output is closely tied to the process used to generate it.

5. Expectations of Embedded AI, Not LLMs, Are Reshaping Evaluations

- **AI is a product requirement, not a discovery tool.** Eighty percent of purchases involved AI capabilities, with AI strongly encouraged (37%) or mandated (21%) in most evaluations. Nearly 80% of those requirements originated from the C-suite or IT.
- **AI and urgency still reinforce each other.** Buyers expecting significant AI were more than twice as likely (65% vs. 29% among those expecting no AI at all) to say economic pressure caused them to engage sellers earlier in the buying journey.
- **Automation and predictive analytics remain buyers' top AI priorities.** More than half of buyers cite automation (56%) and predictive analytics (55%) as desired AI capabilities, even as automation declined from 64% to 56% and content creation from 37% to 31%.

The Category Familiarity Paradox: *Familiar Categories Are Not Easier to Justify*

B2B's Biggest Revenue Blocker: *What Separates Completed from Abandoned Purchases*

6. Buyers Control When They Become Visible to Sellers

- **Buyers hide themselves.** Only 35.2% used real contact info on a form.
- **Leads are mostly lies.** 31.6% have a teammate fill out a form instead of them, 19.3% use a secondary email address, 17.7% use AI tools specifically to dodge a form fill, and 7.4% skip gated content entirely.
- **Buyers become visible only after key decisions are made.** In 82% of cases, first vendor contact is initiated by the buyer's team, and not until 59.2% of the buying journey has elapsed. By then, buying groups have typically already reached consensus on a preferred vendor, and that preferred vendor wins the business 82% of the time. A meaningful share of the leads generated along the way were never real to begin with.

7. Positive Motivations Produce More Successful Journeys

- **Successful purchases are more often driven by growth.** Completed purchases skew toward pursuing benefits (64%) more than stalled or abandoned evaluations do (55%), which skew more toward avoiding a negative outcome (22% vs. 17%) and toward a balanced motivation (23% vs. 19%).
- **Growth trumps reactive triggers.** Advances in available technology (36.8%) and internal growth or scaling needs (29.8%) are, by a wide margin, the leading reasons buying groups start an evaluation — reactive triggers like new leadership (13.8%) or M&A activity (7.3%) are individually rare, even if any one of them can strongly trigger a cycle when it happens.

8. Most No-Decision Outcomes Are Pauses, Not Endings

- Stalling isn't quitting. Stalled evaluations ran 8.6 months on average and engaged 3.3 vendors directly (about 78% of those considered) before stalling. Most had already progressed deep into the buying process, and most evaluations never get that far in the first place: roughly a third of an ICP is in the Selection Phase at any given time, but only 6% continue into Validation.
- Most buyers say they'll be back. 34.1% expect to revisit within 6 months and another 43.8% within 6 to 12 months — a combined 78% — while 14% are on hold indefinitely and just 4.3% have firmly decided not to pursue it.
- The reasons are internal, not competitive. Changing priorities (29%), implementation concerns (26%), unclear ROI (24%), and difficulty reaching internal consensus (21–23%) outrank anything a competitor did. Alternatives were rare — just 13% built in-house and 8% chose an AI tool instead.
- Budget freezes aren't personal. 68.4% of buyers citing budget as a blocker say it's a company-wide freeze, not a decision specific to their deal.
- It's not about the complexity of the deal. Purchase cost (~$370K vs. ~$341K), buying-group size (10.7 vs. 10.65), and Day-1 shortlist size barely differ between purchases and those that stall or get abandoned.
- When they do come back, something usually changes. Budget (43%), use of external resources (41%), vendors considered (39%), stakeholders (31%), or requirements (29%) — only 5% expect to approach it the same way. And for the 9.2% who stay with their incumbent instead, the top reasons are incumbent advantage (51%), switching cost (42%), integration concerns (42%), and compliance requirements (37%).

AI Inside the Solutions B2B Buyers Evaluate & Economic Uncertainty

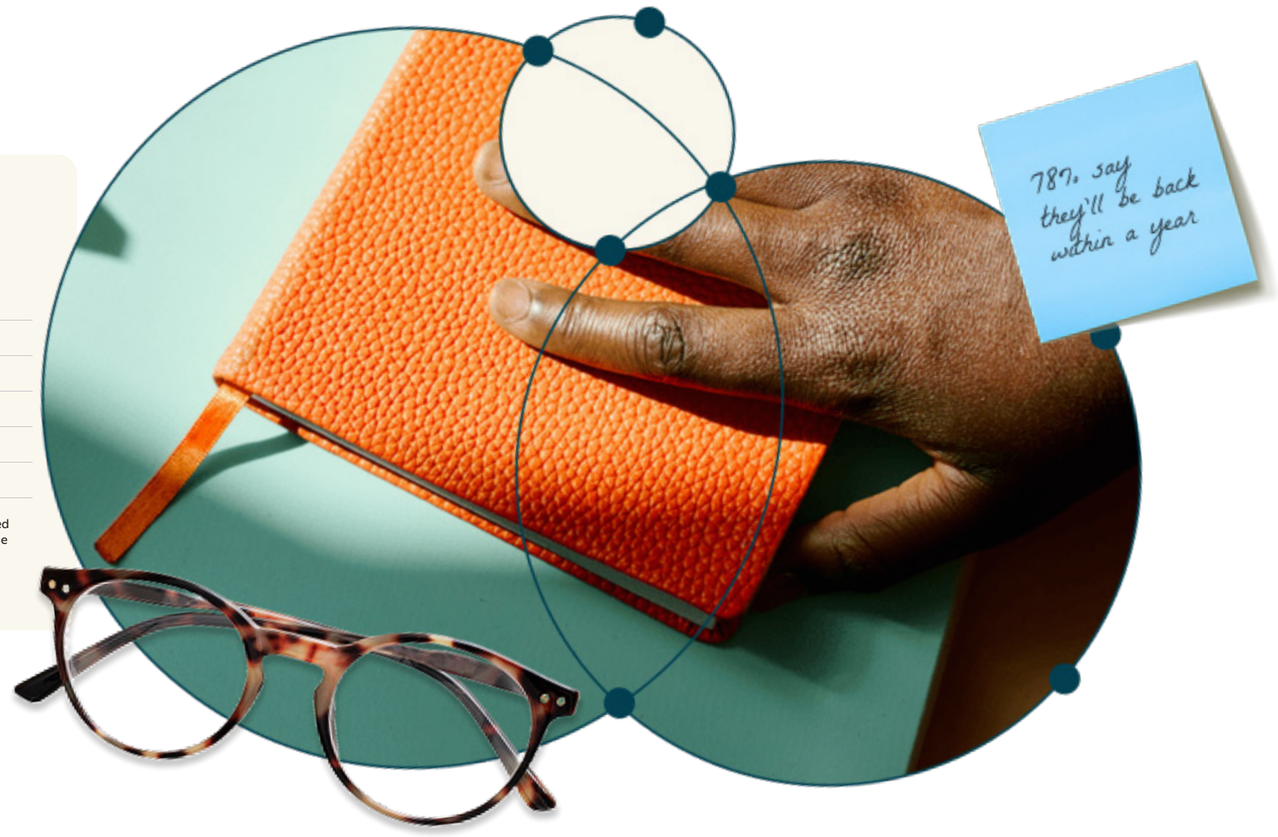




9. The Core Mechanics Hold Up Across Regions

The fundamentals of deliberation-over-discovery are global, with only modest regional variation:

Metric	APAC	Cont. Europe	North America	UK & Ireland	Global
Cycle Length (Months)	10.5	10.3	10.6	9.7	10.3
% Elapsed at First Contact	58%	57%	63%	56%	59%
Buying Group Size	11.1	9.4	10.3	10.5	10.2
Winner on Day 1 Shortlist	91%	92%	91%	92%	92%
Pre-Contact Favorite Won	79%	84%	84%	77%	82%



Implications for Go-To-Market

The buying journey is the substrate on which every B2B revenue function operates. For most organizations over the past two decades, there has been a fatal mismatch between the standard revenue operating model and that substrate. Here's what this year's findings mean for how Go-To-Market teams should adapt.

The Need for ICP Visibility

- **See the whole ICP, not just raised hands.** Revenue teams need visibility into every buyer in their ICP, including those who have not yet engaged.
- **Align engagement to journey stage.** Buyers need different treatment depending on where they are in the journey.
- **Agentic systems make this scalable.** Executing this consistently across an entire ICP and its personas isn't realistically possible without it.

Buying Journeys Begin with Existing Opinions

- **Help buying groups reach consensus.** Messaging should help buying groups align internally and justify decisions.
- **Support the full buying group.** Identifying and influencing supporting-role buyers is as important as reaching the champion.
- **Buying-journey intelligence should shape execution.** Buying-group and buying-journey intelligence need to directly inform marketing programs.

Buying Has Not Migrated to LLMs and Agents to Any Meaningful Degree

- **Don't over-correct.** The data don't support the idea that vendor research has moved wholesale to LLMs and agents.
- **Intent data still matters.** That mistaken belief is already leading some to question intent data's value — the research says it's more relevant, not less.
- **Check your own behavior.** Marketers researching their own purchases still use vendor sites and third-party sources, just like the buyers in this study.

The New/Old Job for B2B Websites

- **Less hype, more help.** Buyer tolerance for pure marketing speak is falling; sites need to be genuinely useful.
- **Content can go deeper.** Buyers use LLMs to summarize content, so richer, role-specific content (CFO vs. IT) is now viable.
- **Both jobs at once.** Websites can't just declare "best," and they can't just be a repository — they need to do both.

Purchases Are More About Acquisition Than Loss Prevention

- **Lead with growth.** Positive motivations drive more successful journeys — position solutions accordingly.
- **Not all demand is equal.** Growth-driven journeys behave differently than journeys triggered by contract pressure or dissatisfaction.
- **Bias toward optimism.** Given the gap in success rates, positioning should skew toward the positive end of the scale.

Buying Journey Attrition: Easily the Biggest Opportunity

- **Attrition is the real competitor.** Most journeys that start in earnest still end without a purchase.
- **Very few buying journeys make it to purchase.** Roughly a third of an ICP is in the Selection Phase at any time; only 6% reach Validation.
- **Justify the category, not just the vendor.** Buyers say justifying the category is as hard as picking a vendor — most marketing doesn't help with that.

New Customers Are Won Only After Many Tries

- **First contact rarely converts.** Successful purchasers usually aren't buying on their first attempt.
- **Plan for the long game.** Net-new sales plans should assume multiple cycles over time, not a single win.
- **Paused isn't dead.** Failed journeys often return later with different budgets, stakeholders, or vendors in play.

The B2B Buyers We Don't Serve: *Helping Buying Group Support Roles Get to "Yes"*

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