

How B2B Buyers Find Software in 2026

What the research says and what it
means for your marketing.

A Demandgap Meta Analysis · March 2026

ABOUT THIS RESEARCH

We synthesized 8+ major studies to understand how buyers find and choose software.

This is not one survey. It's the combined evidence from the largest buyer behavior studies available.

SOURCES

6sense

n=3,974 global B2B buyers

Forrester

n=18,000+ global buyers

G2

n=1,169 B2B decision-makers

Wynter

n=101 B2B SaaS CMOs

TrustRadius

n=2,058 tech buyers

Gartner

n=646 B2B buyers

Google/NRG

n=2,063 US business leaders

Trendemon

122M B2B website journeys

Three shifts are reshaping how B2B buyers find software.



84%

use AI/LLMs for
vendor discovery

Up from 24% in 2025



72%

still use Google but mainly
for verification, not discovery

Only 9% start on Google

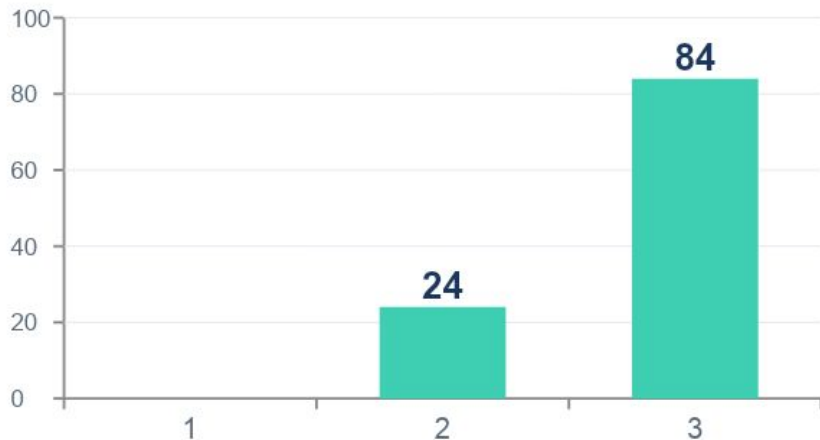


80%

arrive at sales calls
already familiar with you

Up from 64% in 2025

AI usage for vendor discovery went from 0% to 84% in two years.



BUT CONTEXT MATTERS

94%

of buyers use LLMs during buying
(6sense, n=3,974)

7%

directly use LLMs as primary
research tool (TrustRadius)

72%

encounter AI passively via
Google AI Overviews

16

interactions with the winning
vendor are unchanged since 2023

***AI accelerates education.
It does not replace vendor engagement.***

Google is no longer the starting point. It's the fact-checker.

THE SHIFT

72%

still use Google Search

9%

start by Googling a software category

*Google confirms or kills decisions.
It no longer generates them.*

WHAT BUYERS GOOGLE NOW

- Red flags about specific vendors
- Independent reviews and articles
- Validation of AI recommendations
- Specific technical questions
- "[Vendor] vs [Competitor]" comparisons

Four channels dominate B2B discovery. Each plays a distinct role.

72% **GOOGLE**
Verification

Fact-checking. Red flags.
Validating what they heard elsewhere.

68% **AI / LLMs**
Discovery

Landscape mapping.
Initial vendor lists.
Unbiased recommendations.

65% **PEERS**
Trust

Private Slack groups. DMs.
Dinner conversations.
Where shortlists are built.

52% **G2 / REVIEWS**
Validation

Social proof. Ratings.
Peer experiences.
Comparison data.

68% of CMOs use at least 3 of these 4 channels in parallel.

FINDING #3: TRUST

Word of mouth is the #1 factor for consideration.

42%

ranked it #1 out of 8 factors

KEY INSIGHT

AI recommendations (10%) have now surpassed Google Search (8%) as a primary driver of consideration. The top communities where shortlists are built: Pavilion, CMO Coffee Talk, Exit5.

RANKED #1 FOR CONSIDERATION

Word of Mouth / Peers



Brand Fame



G2 / Reviews



LLM / AI Recommendations



Google Search



Paid Ads



Committees grow. Shortlists shrink.

THE BUYING COMMITTEE

5-13

members depending on deal size
and who's counting

CMO (Decision Maker)

Finance / CFO

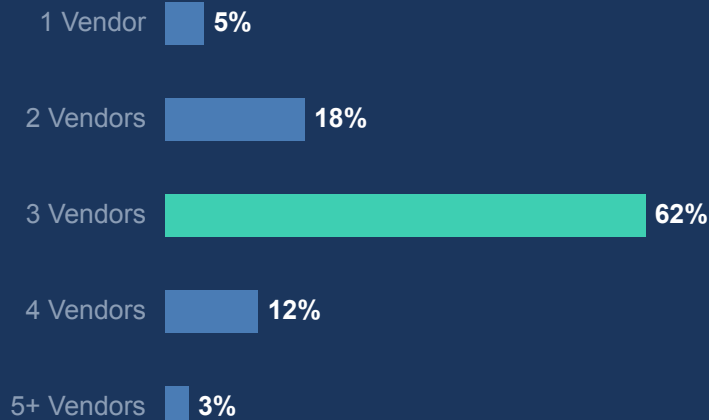
RevOps

IT / Security

End Users

62% evaluate exactly 3 vendors. As committees grow, shortlists shrink to manage complexity.

THE SHORTLIST



FINDING #4: BUYER READINESS

The "cold" demo is dead.

80%

arrive moderately or very familiar with the vendor



THE 6SENSE FINDING

95%

of the time, the winner is already on the buyer's Day One shortlist.

- ✓ Buyers evaluate 5.1 vendors on average
- ✓ 3.6 spots filled before research begins
- ✓ 85% had prior experience with vendors evaluated
- ✓ Buyer-initiated contact: 79%

If you're not on their radar before they start looking, you won't make the shortlist.

34% of CMOs now invest in Generative Engine Optimization.

\$848M

GEO market size
(2025)

2–5x

AI referral traffic
conversion vs. organic

<1%

of total web traffic
comes from AI (today)

GEO = optimizing your brand's visibility in AI-generated answers (ChatGPT, Perplexity, Google AI Overviews).

Europe is 12–18 months behind these trends.

Most research is US-centric. European buyers are catching up, but the gap is measurable.

METRIC	US	EUROPE	SOURCE
AI Overview exposure	73%	59%	TrustRadius
Buyers with minimal pre-research	3%	20%	Responsive
First vendor contact at	64% of journey	52% of journey	6sense
AI Overviews rollout	Full (2024)	Completed Apr 2025	Google

Google Ads role is changing.

Google shifted from where buyers start to where they confirm decisions.
That makes the right Google Ads strategy even more important.

LOSING VALUE

- × Broad, top-of-funnel category terms
- × Generic "what is [solution]" keywords
- × Informational queries AI now answers
- × Spray-and-pray brand awareness campaigns

GAINING VALUE

- ✓ Branded search (verification queries)
- ✓ Competitor conquering campaigns
- ✓ "[Vendor] vs [Competitor]" terms
- ✓ High-intent, bottom-funnel keywords
- ✓ Retargeting educated buyers

Five things to act on now.

01

Brand awareness is the moat

95% of winners come from the Day One shortlist. If buyers don't know you before they start researching, you're already out.

02

Invest in peer advocacy

The most powerful channel (WOM, 42%) can't be bought. Equip your happiest customers with reasons to recommend you.

03

Ungate your content

58% expect interactive demos before talking to sales. Transparent pricing, case studies, and product tours win.

04

Rethink the sales demo

80% arrive educated. Don't start with "who we are." Start with "here's how we solve your specific problem."

05

Monitor your AI visibility

Ask ChatGPT and Perplexity about your category. If you're not in the answer, 84% of your buyers won't find you there.

Research Sources

6sense: 2025 B2B Buyer Experience Report (n=3,974 global buyers, Nov 2025)

6sense: The Impact of GenAI and LLMs on B2B Buyer Research (Nov 2025)

Forrester: The State of Business Buying 2026 (n=~18,000 global buyers)

Forrester: B2B Buyer Adoption of Generative AI (Buyers' Journey Survey, 2024)

G2: 2025 Buyer Behavior Report (n=1,169 B2B decision-makers, May 2025)

Gartner: Sales Survey: 67% of B2B Buyers Prefer Rep-Free Experience (n=646, Mar 2026)

Gartner: 74% of B2B Buyer Teams Demonstrate Unhealthy Conflict (n=632, May 2025)

Wynter: How B2B SaaS CMOs Buy Software in 2026 (n=101 CMOs, Jan 2026)

TrustRadius: Bridging the Trust Gap: B2B Tech Buying in the Age of AI (n=2,058, Apr 2025)

Google/NRG: B2B Buyer Journey Study (n=2,063 US business leaders, Oct 2025)

Trendemon: 2025 B2B Buyer Journey Data (122M website journeys, Mar 2026)

Previsible: 2025 State of AI Discovery Report (1.96M LLM sessions, Jan 2026)

Dreamdata: B2B Google Search Ads Benchmark (non-branded, 2025)

Conductor: The State of AEO/GEO in 2026 (n=250+ C-suite leaders)

Kalwey, Krafft, Lim & Mantrala: 'Holistic Selling' (Journal of Marketing, 2025)

Princeton/IIT Delhi: GEO: Generative Engine Optimization (KDD 2024, arXiv:2311.09735)

All data points verified against original source publications.



demand gap

B2B Performance Marketing

Google Ads · LinkedIn Ads · Strategy

