

ANNUAL REPORT — 3RD EDITION

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# How B2B SaaS CMOs Buy Software in 2026

A comprehensive analysis of vendor discovery, evaluation, and purchasing behaviors.

Wynter Research  
January 2026



## We surveyed 101 B2B SaaS CMOs to understand how they discover, evaluate, and purchase software.

### Why open-ended questions?

We capture authentic buyer language and unexpected insights rather than forcing responses into predetermined categories.

01

### Sample Size

101 CMOs from mid-market B2B SaaS companies (\$50M+ revenue)

02

### Format

14 open-ended questions (not multiple choice)

03

### Analysis

Thematic coding of authentic responses

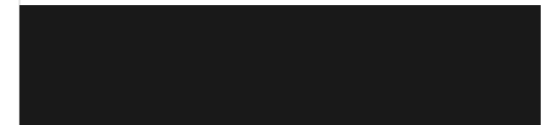
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### Date

Survey conducted January 2026

### Respondent Profile

I-Market B2B SaaS (\$50M+ Revenue)



**Open-ended questions reveal what CMOs actually think, not what we expect them to say.**

## TRADITIONAL SURVEYS

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- ✗ Pre-set multiple choice options
- ✗ Risk leading respondents
- ✗ Miss unexpected insights

## WYNTER'S APPROACH

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- ✓ Open-ended responses
- ✓ Thematic coding
- ✓ Authentic buyer language
- ✓ Genuine priorities emerge naturally

## Three seismic shifts are reshaping how CMOs buy software in 2026

### FINDING #1

3.5X INCREASE

# 84%

**Of CMOs now use AI/LLMs for vendor discovery.**

Up from 24% in 2025. AI has fundamentally disrupted how buyers find solutions.

### FINDING #2

RANKED #1 FACTOR

# 65%

**Start vendor searches in peer communities.**

Word of mouth dominates consideration, scaled through private Slack groups and communities.

### FINDING #3

DOUBLED YOY

# 80%

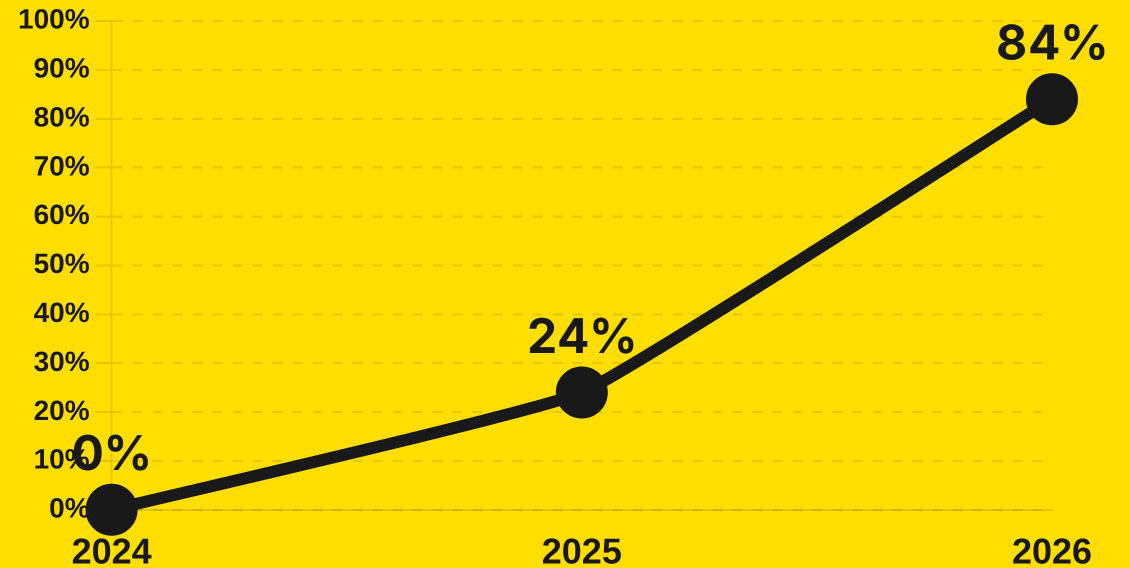
**Arrive at sales calls moderately or very familiar with the vendor**

**AI usage for vendor discovery exploded from 24% to 84% in just 12 months.**

**3.5x**

INCREASE IN 1 YEAR

**Critical Insight:** 68% of CMOs now start their searches with AI tools *before* traditional search engines.



*"I'm using Perplexity so I can do a natural language search to find software types. I use Google only if I have certainty about which specific software types or products I want."*

— B2B SaaS CMO

# **Word of mouth is the #1 consideration factor, scaled through private communities.**

42% of CMOs ranked it first. Average rank 2.1 out of 8.

### **TOP COMMUNITIES**

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- Private Slack Groups
- CMO Coffee Talk
- Exit5
- CMO Huddles
- Pavilion
- Chief

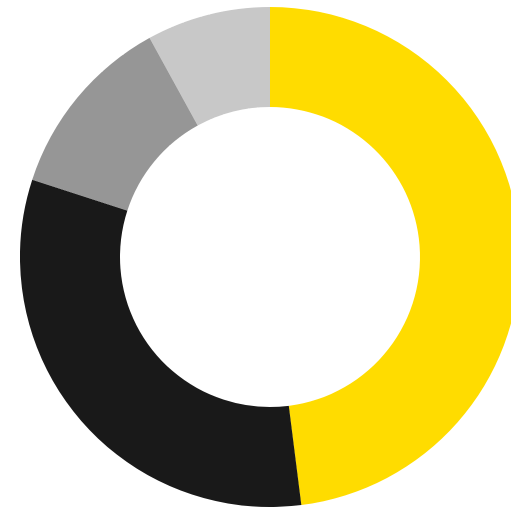
**48% of CMOs arrive at sales calls "very familiar" — more than doubling from 2025.**

**48%**

Arrive "Very Familiar"

**UP FROM 22% IN 2025**

*"I never go into a demo blind anymore. I've already done my homework — the demo is just to confirm what I think I know."*



**Pre-Call Familiarity Levels**

(2026 Data)

- Very Familiar (48%)
- Moderately Familiar (32%)
- Minimal Familiarity (12%)
- Known Vendors Only (8%)

**WHAT "VERY FAMILIAR" MEANS**

By the time they book a demo, buyers have already:

- Asked peers in private communities
- Queried AI tools for comparisons
- Read G2 reviews & visited your website
- Tried your interactive demo (if available)
- Formed opinions about your product

# YEAR-OVER-YEAR CHANGES

Five major shifts between 2025 and 2026 reveal accelerating buyer behavior transformation.

	2025	2026	CHANGE
<b>AI usage for vendor discovery</b>	24%	<b>84%</b>	<b>+60 pts (3.5x)</b>
<b>GEO/AEO investment priority</b>	0%	<b>34%</b>	<b>New category</b>
<b>Moderately+ familiar pre-call</b>	64%	80%	+16 pts
<b>Very familiar pre-call</b>	22%	<b>48%</b>	<b>+26 pts (2.2x)</b>
<b>Expect interactive demos before sales</b>	46%	58%	+12 pts

2025 PREDICTION

*"AI-assisted research will likely more than double."*

2026 REALITY

**3.5x**

Increase in usage  
(24% → 84%)

## The New Discovery Paradigm

### 2025 Pattern (Linear)



### 2026 Pattern (AI-First)



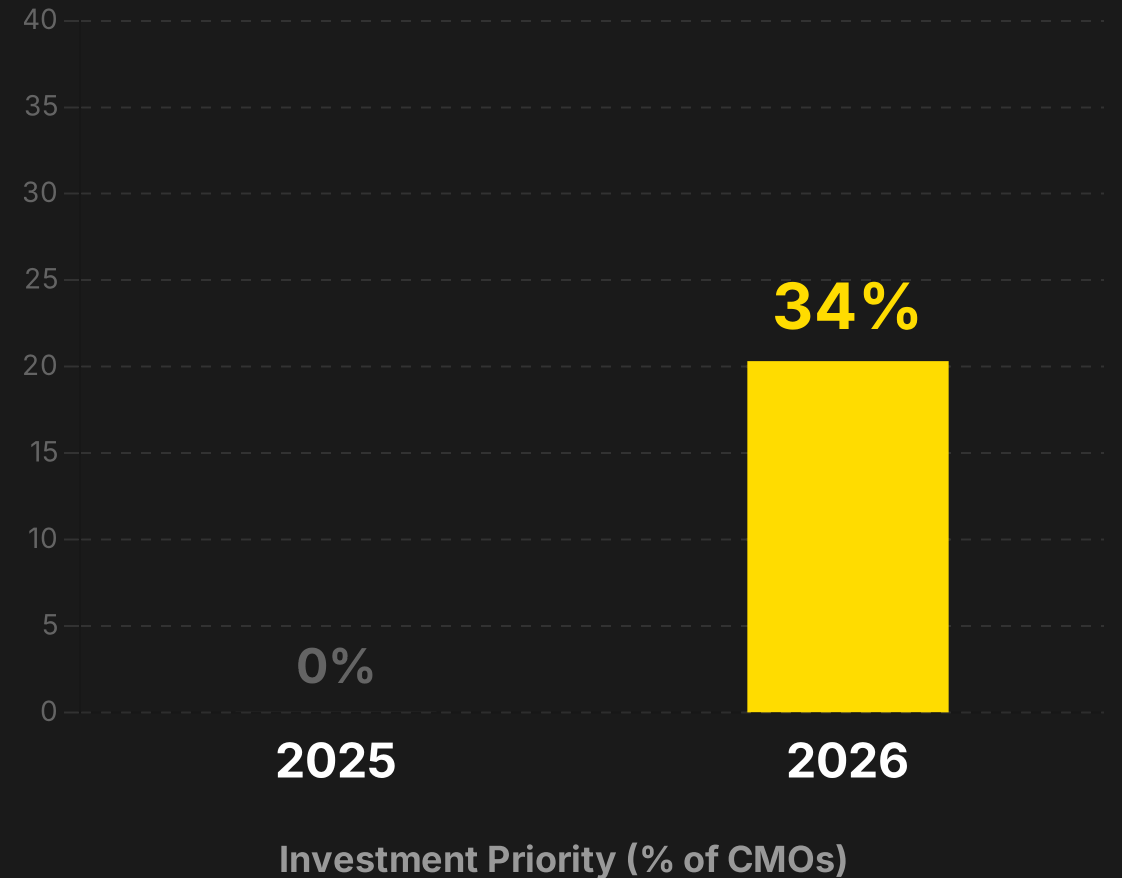
**The Shift:** 68% of CMOs now start with AI tools before traditional search. They use LLMs to map the landscape quickly and get "unbiased" recommendations.

# 34% of CMOs now invest in **Generative Engine Optimization**.

## WHAT IS GEO/AEO?

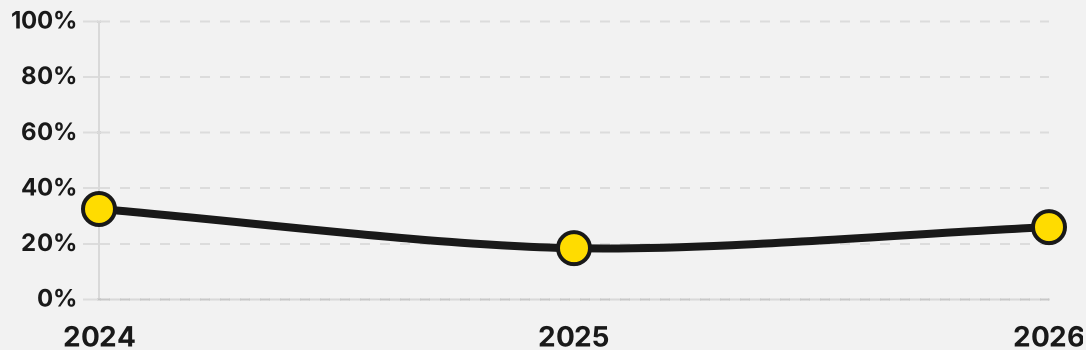
Optimizing brand visibility in AI/LLM responses — "the new SEO".

*"If ChatGPT doesn't know you exist, neither will 84% of your buyers."*



# Google usage rebounded to 72%, but its role shifted from discovery to verification.

**72%** Usage in 2026



**Crucial Context:** Only 9% of CMOs start by googling a software category.

~~Discovery Engine~~ →

**Verification Layer**

**What they search for now:**

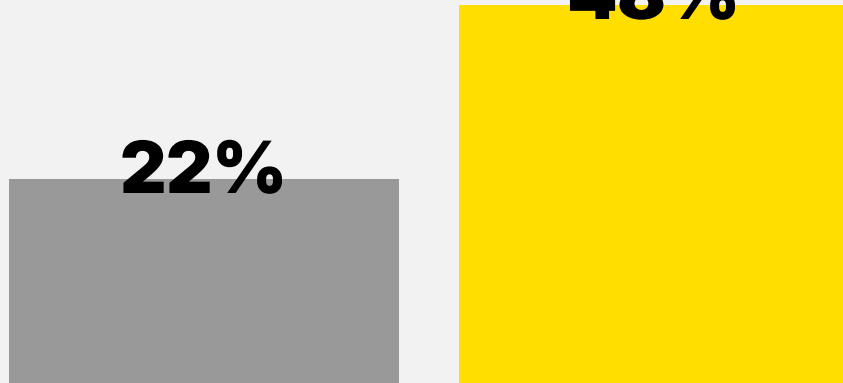
- Red flags about specific vendors
- Independent articles and reviews
- Validation of what they heard elsewhere
- Specific technical questions

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*"Google is my fact-checker now, not my idea generator. I use it to find the negative reviews and complaints."*

# The "very familiar" buyer segment more than doubled.

48%



2025

2026

2.2X INCREASE

## HOW THE SALES CONVERSATION HAS CHANGED

OLD MODEL

"Let me tell you about our product and how it works."

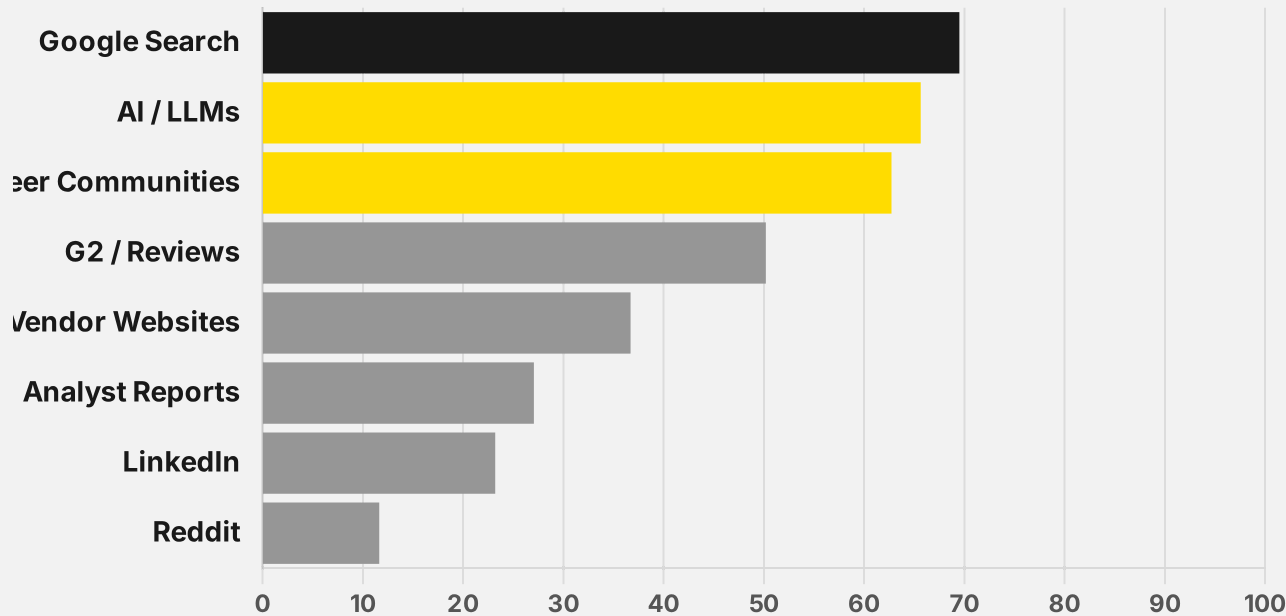


NEW MODEL

"Let me confirm I understand your specific situation and show you how we solve it."

*"If a sales rep starts with 'So tell me about your company,' I know they haven't done their homework and the call is going to be a waste of time."*

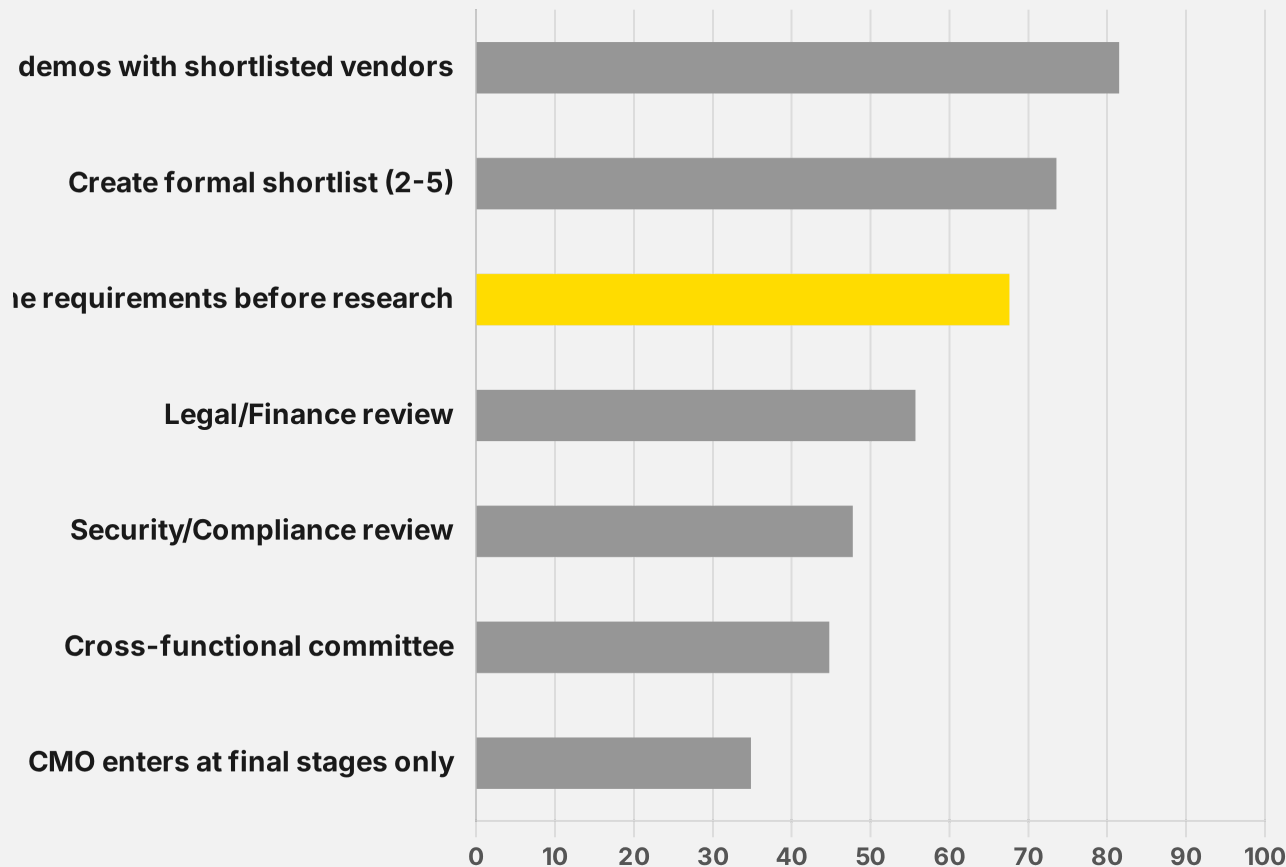
# Multi-channel discovery is universal.



**KEY INSIGHT**  
**AI (68%) and peer communities (65%) are now functionally equivalent starting points. Most CMOs use both simultaneously.**

*"My process is: ask my CMO Slack group, ask ChatGPT, cross-reference on G2. By the time I Google anything, I already have a shortlist."*

# CMOs follow a structured, stage-gated process.



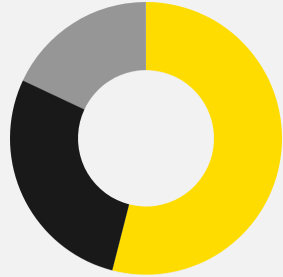
## THE TYPICAL JOURNEY

- 1 Problem/need identified
- 2 **Requirements mapped (before research)**
- 3 Initial research (AI, communities)
- 4 Long list created (5-7 vendors)
- 5 Team evaluates, creates shortlist
- 6 Demos with buying committee
- 7 Security/Legal/Finance review
- 8 Final decision

**Insight: 68% define requirements before looking for solutions — mapping what's broken first.**

## THE APPROACH

**54% start with known brands but remain open to new options.**

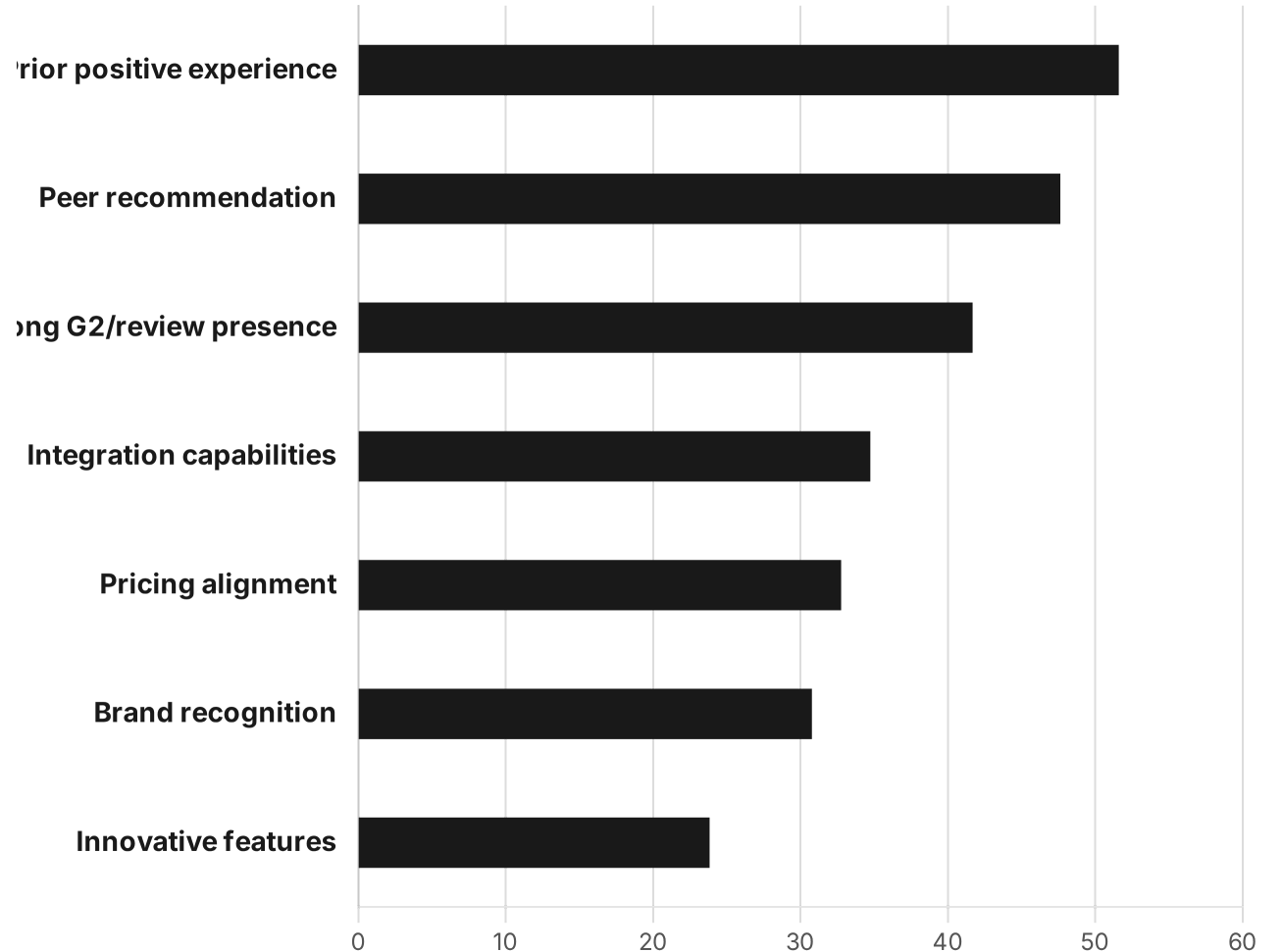


■ Start with known, open to new  
■ Strongly prefer known

“

*"I start with the names I know, but I'm always looking for the 'secret weapon' tool that my competitors haven't found yet."*

## FACTORS FOR SHORTLIST INCLUSION



# The "Big Four" channels dominate discovery.

Discovery is no longer about picking one channel. It's about omnipresence across the four pillars of trust.

STRATEGIC REALITY

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

GOOGLE

72%

Verification

AI / LLMS

68%

Discovery

PEERS

65%

Trust

G2 / REVIEWS

52%

Validation

**Website visits are universal; interactive demos are now expected.**

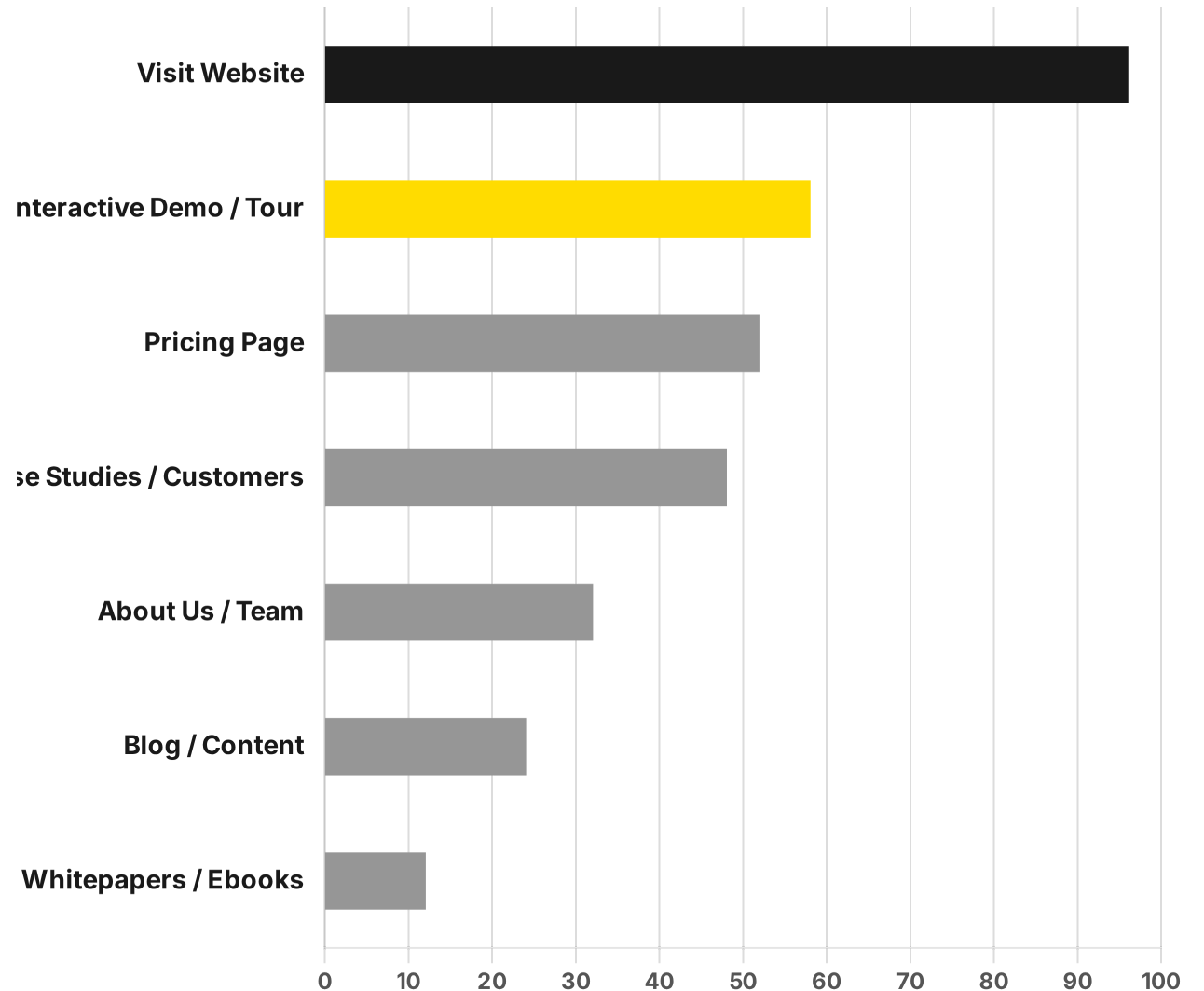
**96%**

VISIT WEBSITE

**58%**

TRY INTERACTIVE DEMO

*"I want to see the product and the price. If I have to book a demo to see either, I'm gone."*



HOW THEY TYPICALLY BUY



**72%**  
Sales-Led

HOW THEY PREFER TO BUY



**58%**  
Sales-Led

The Friction Gap: Buyers want significantly more self-serve options than the market currently provides.

**+14%**

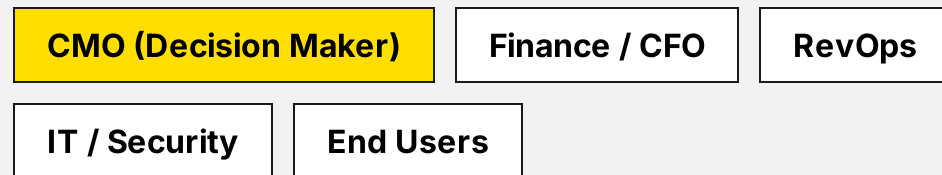
UNMET DEMAND FOR SELF-SERVE

THE BUYING COMMITTEE

**5.1** Average Members

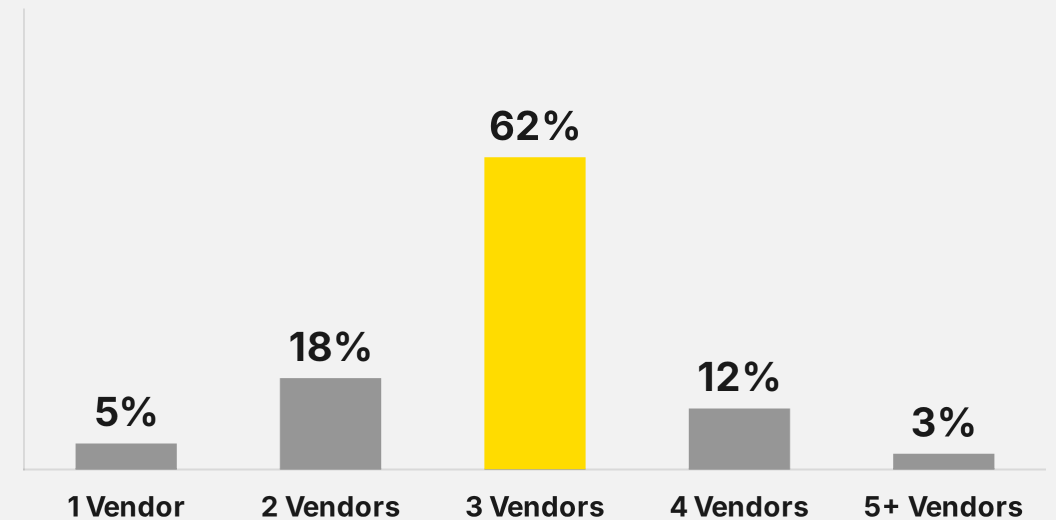
Decisions are rarely solo. Even for mid-market tools, the committee has expanded.

Who's involved:



THE SHORTLIST SIZE

Number of Vendors Shortlisted

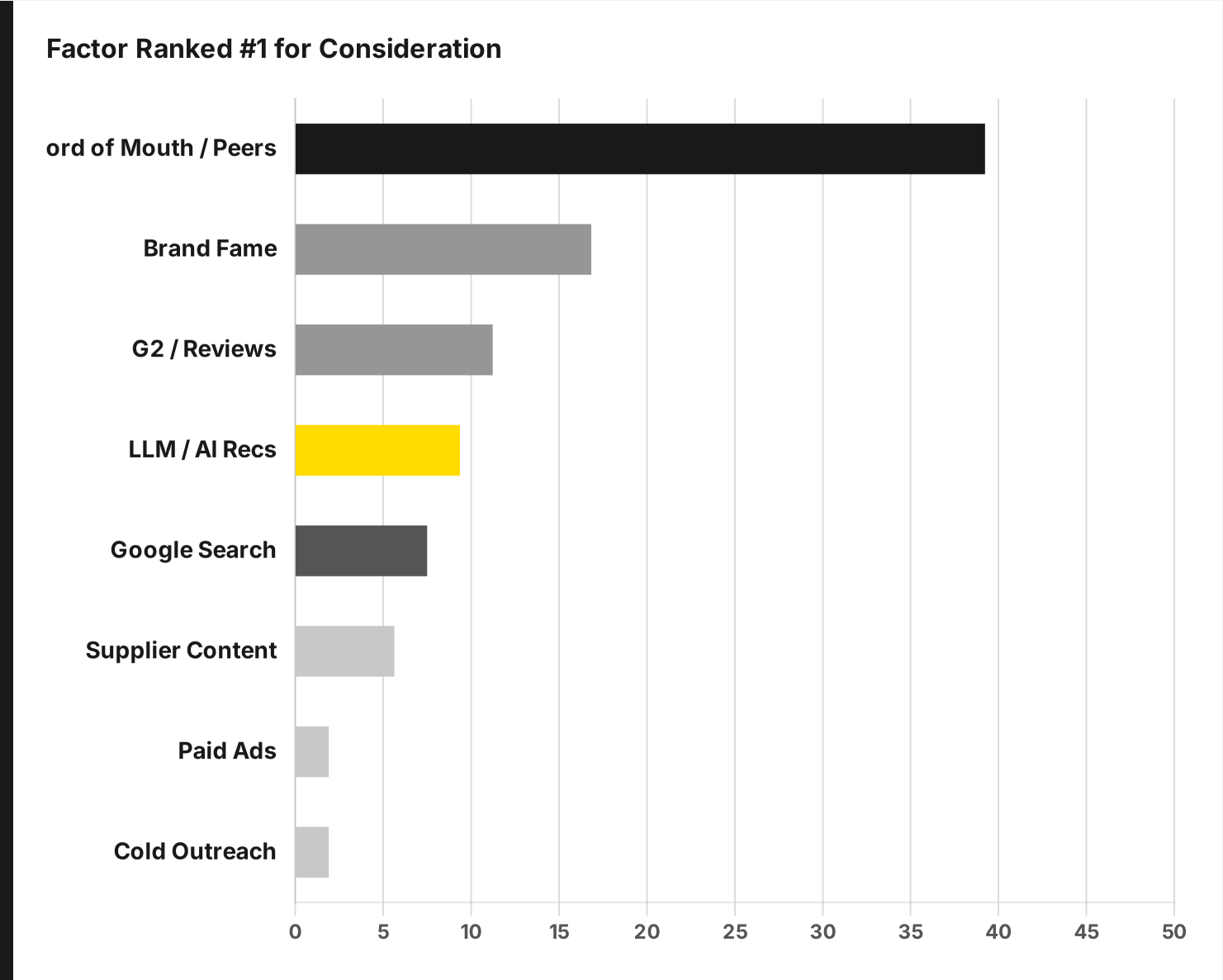


**The Squeeze:** As committee size grows, the shortlist shrinks to manage complexity. 62% of buyers only look at exactly 3 vendors.

# Trust (Peers) and Reputation (Brand) outweigh everything else.

When asked to rank factors #1 for consideration, buyers overwhelmingly choose human validation over vendor content.

**THE SHIFT**  
**AI Recommendations (10%) have now surpassed Google Search (8%) as a primary driver of consideration.**



# Sales demos close deals.

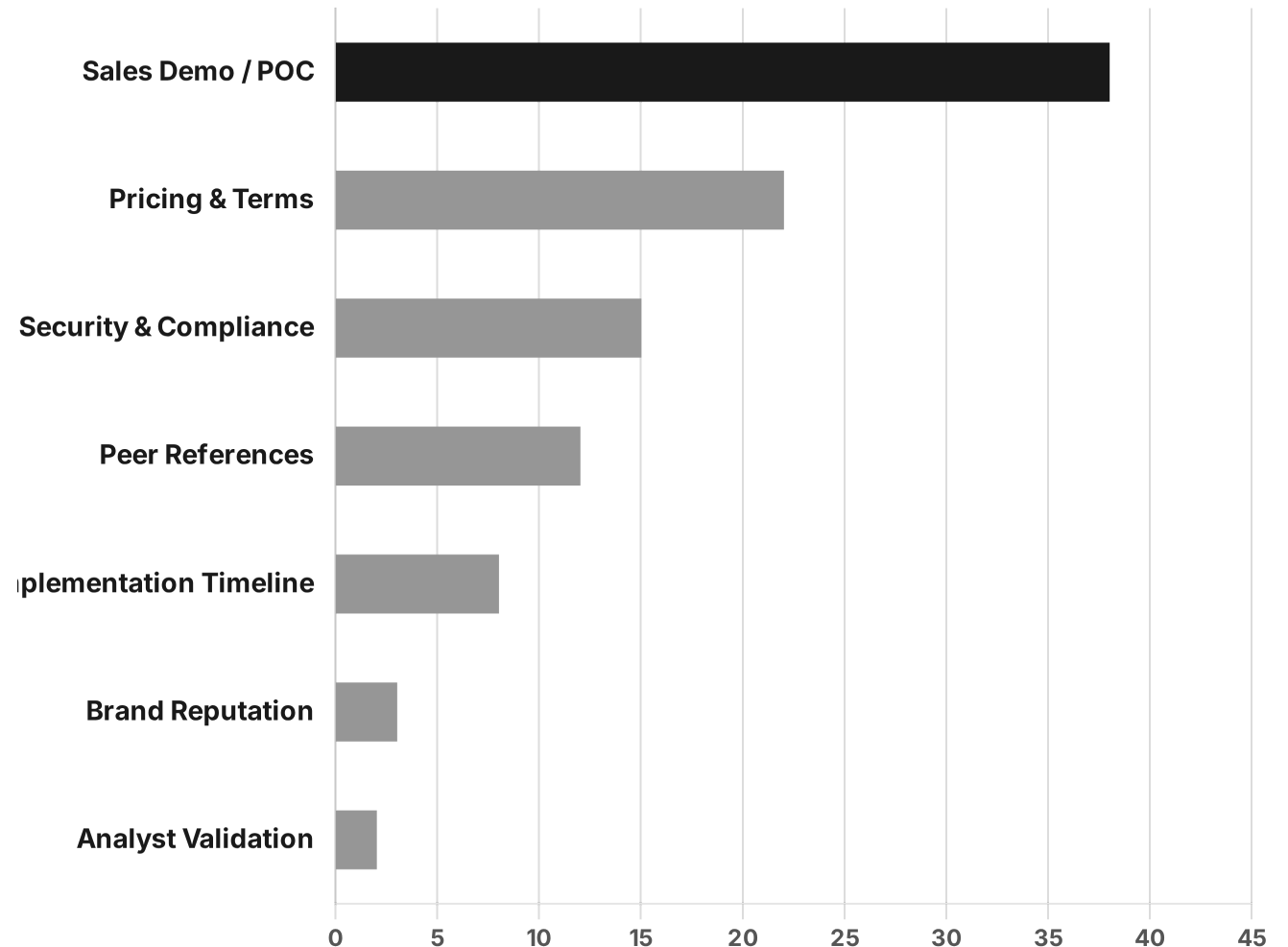
# 38%

RANK DEMO #1 FACTOR

While word of mouth opens the door, the demo is the "proof" stage that validates the hypothesis.

**"The demo is where I verify if it actually does what they say it does. It's the final exam."**

Factors Ranked #1 for Final Selection



# Strategic importance dictates who does the homework.

THE RULE

CMO involvement scales directly with deal size and strategic impact.

*"If it touches revenue strategy or brand reputation, I'm doing the research myself. If it's a productivity tool, the team decides."*

■ CMO Leads Research    ■ Team Leads Research

Strategic Platforms (CRM, MAP)



Core Dept Tools (SEO, Content)



Tactical / Point Solutions

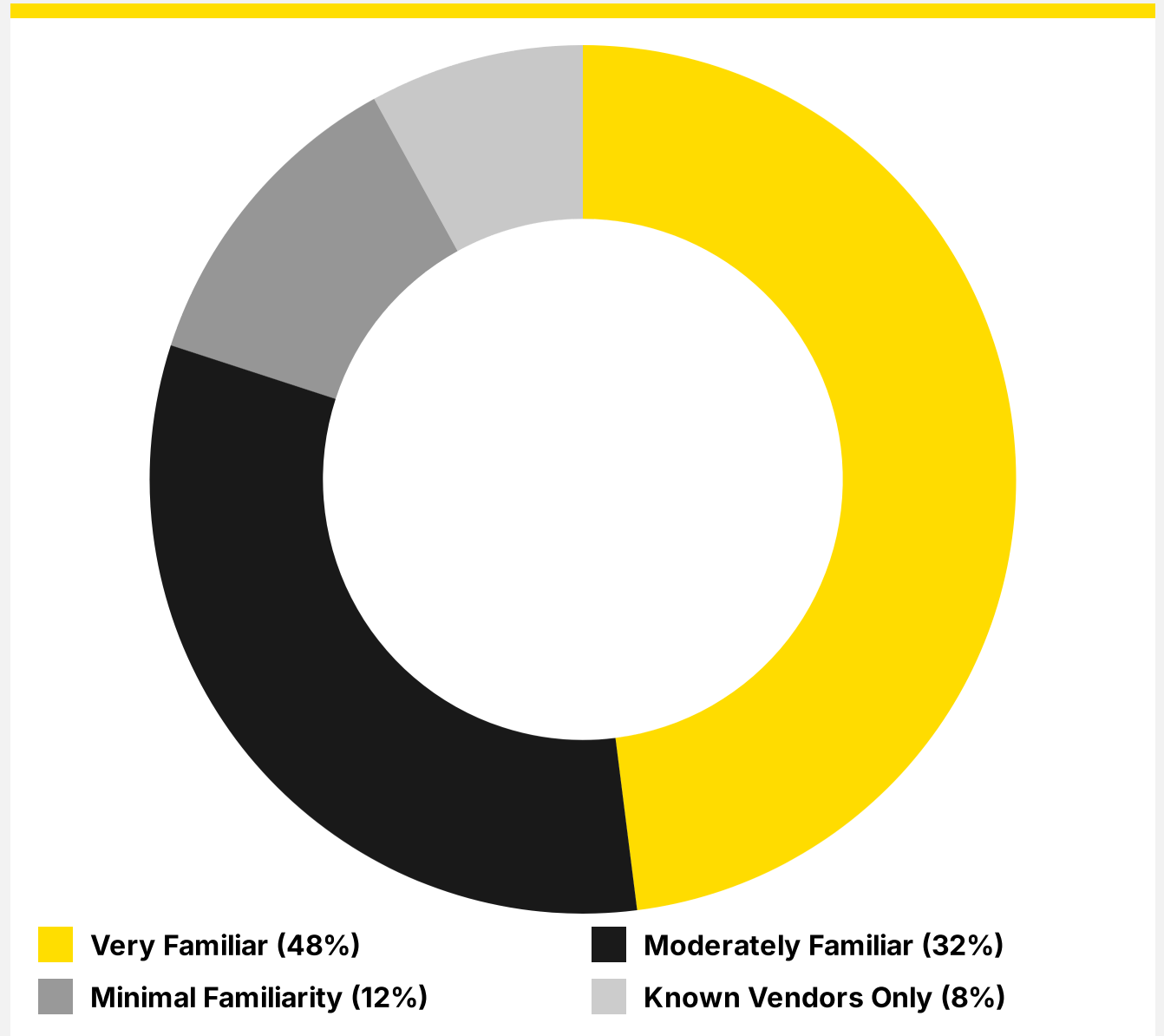


# The "Cold" Demo is Dead.

80%

ARRIVE MODERATELY OR VERY FAMILIAR

**Implication:** If your sales deck starts with "Who We Are" and "The Problem," you are wasting the first 10 minutes telling them what they already know.

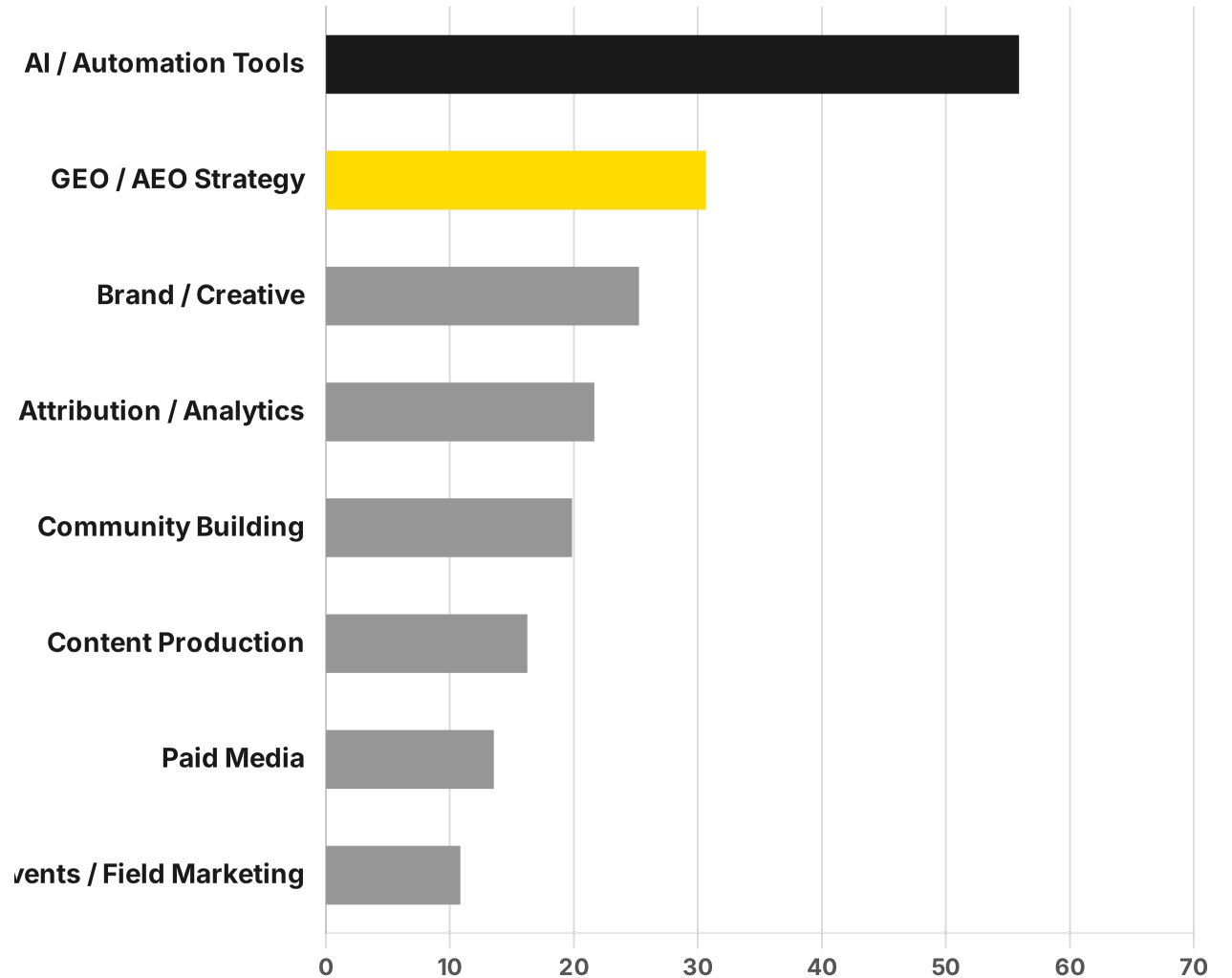


# AI dominates, but GEO/AEO is the shock new priority.

Budgets are following buyer behavior. The fear of being invisible in AI search results has driven GEO to the #2 spot in a single year.

**STRATEGIC SHIFT**

**Traditional SEO budgets are being reallocated to Generative Engine Optimization.**



# Four fundamental shifts have reshaped the B2B buying landscape.

01

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## AI INFRASTRUCTURE

Buying now often happens via AI agents and LLMs acting as intermediaries.

03

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## DEEP HOMEWORK

Buyers complete most research before contacting vendors; self-service rules the early cycle.

02

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## THE RISE OF GEO

Generative Engine Optimization outranks traditional SEO in discovery value.

04

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## TRUST OVER NOISE

Human validation—WOM and communities—now outperforms raw AI-generated signals.

## SYSTEM A

# Human Networks

### The Venue

Private Slack groups, Discords, DMs, Dinner parties.

### The Currency

**Trust.** Recommendations come from people with nothing to sell.

### The Strategy

Customer Advocacy & Community Presence.

## SYSTEM B

# Machine Networks

### The Venue

ChatGPT, Perplexity, Google AI Overviews, Claude.

### The Currency.

**Relevance.** Answers are synthesized from authoritative data.

### The Strategy.

Generative Engine Optimization (GEO) & Digital PR.

**THE NEW  
STANDARD**

# The most powerful marketing channel is one you can't track.

Private Slack groups, DMs, and dinner parties are where the shortlist is actually built. You cannot buy this attention; you must earn it.

## OPERATIONALIZING ADVOCACY

### STEP 01

#### Identify Superfans

Don't just look at NPS. Look for who is defending you in LinkedIn comments and community threads.

### STEP 02

#### Equip Them

Give your advocates insider data, sneak peeks, and "social currency" they can share with their peers.

### STEP 03

#### Mobilize

Stop asking for generic case studies. Ask for specific interventions in specific conversations.

# Stop gating. Start enabling.

Buyers are doing the work for you. Don't put up walls. If they can't learn about your product on your site, they will learn about it from your competitor.

## ■ UNGATE YOUR CONTENT

Remove forms from case studies and whitepapers. Use them to build trust, not to capture emails that will unsubscribe anyway.

## ■ TRANSPARENT PRICING

"Contact Sales" is a churn driver. Even a starting range qualifies buyers better than a mystery box.

## ■ INTERACTIVE DEMOS

Let them click. 58% of buyers expect to tour the product before they ever speak to a human.

## THE OLD PLAYBOOK

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# The "Discovery" Call

- ✘ "Tell me about your business."  
(They expect you to know)
- ✘ Generic "Corporate Overview" slides.  
(They've seen the website)
- ✘ Saving the price for the end.  
(They want to qualify you now)



## THE NEW PLAYBOOK

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# The "Validation" Call

- ✓ "Based on your size/stack, we assume X is the problem. Correct?"
- ✓ Jump straight to the specific workflow that solves the pain.
- ✓ Discuss implementation & pricing in the first 15 minutes.

# If ChatGPT doesn't know you, you don't exist.

In traditional search, being on Page 2 meant low traffic. In AI search, being excluded from the answer means **zero visibility**.

**The "Long Tail" is dead. The "Short Answer" is king.**

**User:** Who are the top 3 enterprise ABM platforms for 2026?

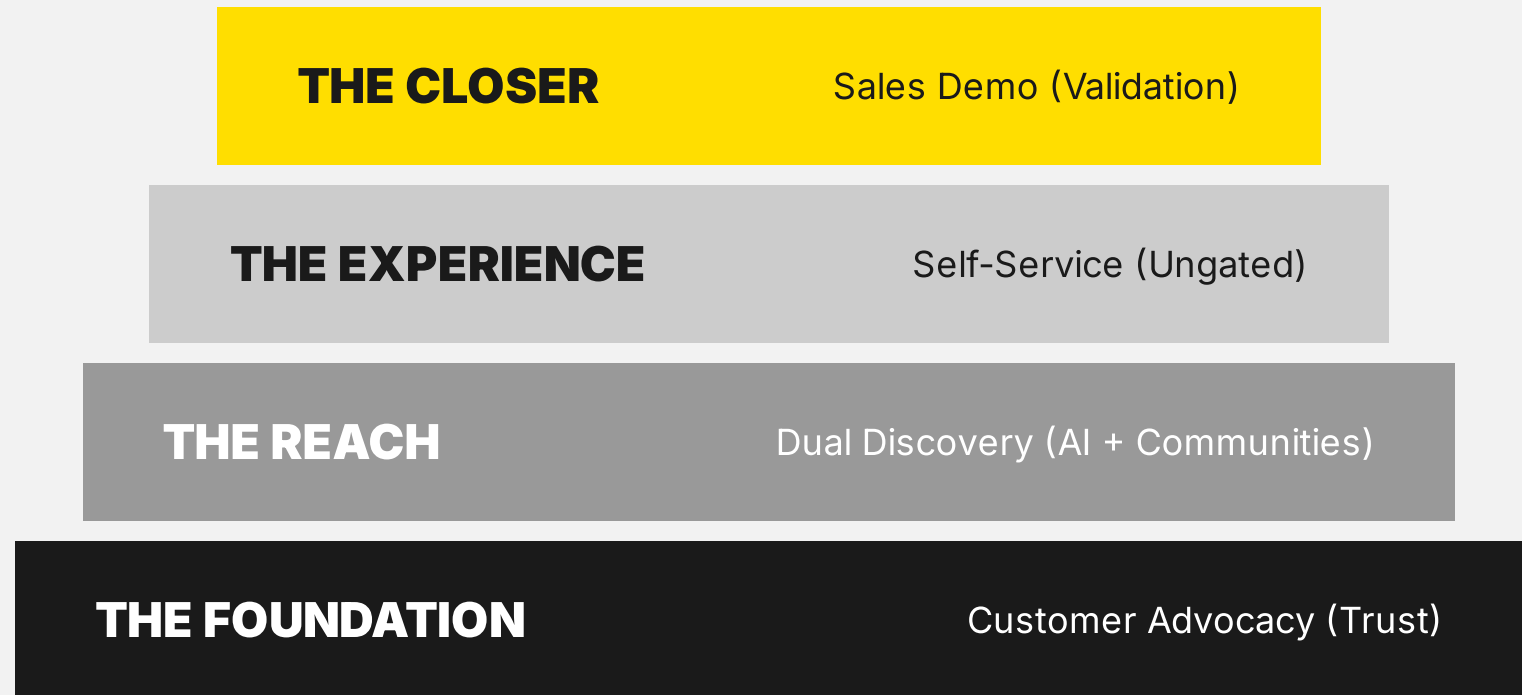
Based on recent reviews, market presence, and user sentiment, here are the top recommendations:

1. **6sense** - Best for predictive intelligence and intent data integration.
2. **Demandbase** - Strongest for account-based advertising and personalization.
3. **YOUR BRAND HERE?**

Sources: G2, Capterra, Gartner, Forrester...

# The New B2B Growth Funnel

Winning in 2026 isn't about fixing the funnel. It's about building a stack that survives the "Dark Funnel" and converts the "Educated Buyer."



# Get answers from your target market in hours, not months.

Wynter is the fast alternative to traditional B2B market research. It's the only B2B market research tool with on-demand responses in 48 hours from verified B2B decision-makers. (No synthetic data nor LLM fantasy).

Learn more at [wynter.com](https://wynter.com)

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**1**

## VERIFIED AUDIENCES

Access hard-to-reach B2B personas: CMOs, CTOs, VPs of Sales, and Industry Specialists. No panel fatigue.

**2**

## LIGHTNING SPEED

Launch a test and get full qualitative and quantitative results in 12-48 hours.

**3**

## MESSAGE TESTING

Validate your value proposition, website copy, and sales decks before you go to market.

# Thank You.

wynter

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