



eBook

Inside the minds of 2026 tech buyers

7 critical buyer shifts that will shape your 2026 strategy



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7 Critical buyer shifts that will shape your 2026 strategy

2026 won't just be another year of transformation—it will be a pivotal inflection point. Buyers are recalibrating fast, driven by mounting economic pressures, evolving tech priorities, and a new mandate for results. What worked in 2024 and 2025 won't cut it.

According to IDC Future Enterprise Resiliency & Spending Survey, (July 2025), 68.7% of organizations globally anticipate a recession in the coming year. Despite this economic uncertainty, IT spending remains resilient, with organizations prioritizing investments in AI, automation, security, and IT optimization initiatives. These areas are considered immune to budget reductions, highlighting the urgency for tech suppliers to align their offerings with buyer priorities in 2026.



In this exclusive IDC analysis, we unpack the 7 critical buyer shifts every tech supplier must understand to lead with relevance and precision in 2026. Whether you're setting budgets, building pipeline, refining GTM strategies, or validating product roadmaps, these shifts are your signal through the noise.

Source: IDC's Technology Investment and Innovation Monitor,
June 2025



1. Precision over promise: buyers demand targeted ROI, not broad narratives

Strategic alignment used to be enough to win stakeholder buy-in. Today, that's standard. 2026 buyers (especially those in procurement, finance, and RevOps) demand precision. They need to see the numbers. Undefined promises of transformation no longer fly in boardrooms under pressure to show quarterly impact.

What this means: Your value story must be modular, quantifiable, and tailored to real business metrics. Buyers expect ROI at the use-case level and time-to-impact data as early as the consideration stage. Vendors that continue to sell with vision decks alone will lose to those who bring proof to every conversation.

Implication: Outcome-first messaging must now lead the sales funnel. Competitive justification, use-case benchmarking, and defensible ROI scenarios are your entry ticket, not your closer.

→ IDC Insight: Buyers that quantify ROI at the use-case level are **3.5x more** likely to renew within 12 months.

Source: IDC SaaS Path: Vendor Ratings Report, 2025



2. The rebirth of the informed buyer: market intelligence is now table stakes

The age of the passive buyer is over. Strategic sourcing and finance teams now partner with the C-suite to evaluate spend with forensic precision. IDC's research shows a surge in third-party data usage, not just to justify investments, but to challenge vendor claims and internal biases.

Insights from IDC's External Data Sourcing and Collaboration Survey (June 2024), **57% of North American enterprises plan to change their external data vendors due to heightened concerns about data privacy and security.** This shift reflects the growing demand for trusted, high-quality third-party data sources that can withstand scrutiny from strategic sourcing teams. Additionally, **20% of enterprises plan to reduce the amount of external data they source, emphasizing the need for vendors to provide credible, privacy-compliant data solutions.**

→ **Data Collaboration:** Enterprises are increasingly leaning into data exchanges and clean rooms to collaborate securely with trusted partners, ensuring data privacy while enabling actionable insights.

→ **Vendor Scrutiny:** Contracts now include stricter security and privacy guarantees, reflecting the forensic precision buyers apply to vendor evaluations.

Implication: Market intelligence is no longer a support function, it's a competitive differentiator. Vendors must bake validated data and market context into GTM strategies from the first touchpoint.

What this means: Sales and marketing teams must be armed with market intelligence that is current, context-specific, and aligned to buyer concerns across geographies, sectors, and spend categories. Vendors who fail to provide credible external validation risk losing ground to competitors who do.

If you're not bringing credible, external validation to the conversation, your competitors will. Sales and marketing teams must be armed with market intelligence that's current, context-specific, and aligned to buyer concerns across geos, sectors, and spend categories.

→ **Proof Point:** IDC Wallet and Spending Guide data empowers vendors to align with buyer budgets, highlighting actual spend patterns across 153K buyer organizations and 11B+ data points.

Source: IDC Document US52376824



3. AI moves from pilot to platform

AI experimentation was the story of 2023–2024. In 2026, it's about operational scale. Buyers are shifting focus from pilot proofs of concept to platforms that integrate AI into core processes. "Does it use AI?" is no longer the question. "How well is it integrated, governed, and secured?" is.

What this means: Your product's AI credibility will be scrutinized for maturity, transparency, and strategic value. Buyers will prioritize partners who demonstrate responsible AI embedded in architecture—not marketing.

Implication: You must differentiate not just on AI capability, but AI readiness. Show how AI improves outcomes at the functional level—be it automation in RevOps, personalization in marketing, or efficiency in IT.

→ Spending Signal: IDC forecasts \$500B+ in AI-related investments by 2026, spanning 42 use cases across 32 countries.

Source: IDC Worldwide Artificial Intelligence IT Spending Forecast, 2025–2029



4. The new stakeholder map: procurement and RevOps gain power

Buying committees are growing and changing. Finance, RevOps, and Procurement are no longer back-office voices. They now drive vendor evaluations, challenge integrations, and escalate red flags. This shift reflects a broader enterprise trend: managing tech sprawl, risk, and accountability.

IDC's Worldwide Procurement Applications Forecast, 2025–2029 highlights that spend management applications are increasingly viewed as strategic tools rather than transactional systems. Organizations are leveraging these applications to address compliance, risk, efficiency, savings, and sustainability, reflecting the growing influence of procurement teams in driving enterprise-wide accountability and decision-making. The report also notes that AI-infused procurement platforms are becoming "table stakes," enabling dynamic supplier assessments and risk scoring, which align closely with RevOps' focus on process efficiency and Finance's emphasis on risk mitigation.

→ **AI-Driven Procurement:** AI adoption in procurement is accelerating, with platforms automating routine tasks and providing real-time insights, empowering procurement teams to make data-driven decisions that resonate with RevOps and Finance stakeholders.

→ **Risk Management:** Procurement applications now prioritize real-time supplier risk scoring, replacing static reviews, which aligns with the broader enterprise trend of managing accountability and mitigating risks.

Implication: You must differentiate not just on AI capability, but AI readiness. Show how AI improves outcomes at the functional level—be it automation in RevOps, personalization in marketing, or efficiency in IT.

What this means: Selling to the user or champion isn't enough. If your message doesn't resonate with procurement's budget models or RevOps' process efficiency goals, your deal may stall, or die quietly.

→ **Strategic Enablement:** IDC's Services Contracts Database surfaces renewal timelines, contract details, and buyer behavior trends across **120,000 organizations**, equipping sellers to align with stakeholder priorities and timing.

Source: IDC Document US52239625



5. Experience is a differentiator—but only if it's measurable

"Customer-centric" is everywhere, but buyers are asking: "Where's the impact?" They've seen too many pitches with glowing testimonials and too few with actual results. Experience still matters—but only when it's backed by operational metrics.

According to IDC's Customer Experience Management Strategies Survey (October 2024), **41.8% of organizations use Customer Satisfaction (CSAT) as the primary metric to assess performance related to customer experience initiatives, followed closely by Customer Retention Rate (41.2%) and Repeat Purchase/Renewal per Customer (28%).** These metrics highlight the growing emphasis on measurable outcomes, such as retention and lifetime value, over subjective claims of enhanced engagement.

→ **Operational Metrics Matter:** Leading organizations achieve **180% higher customer retention rates and 1.6x revenue growth** compared to their peers by focusing on measurable business outcomes tied to customer experience.

→ **Value-Oriented CX:** Enterprises that prioritize operational metrics, such as customer lifetime value (CLV) and Net Promoter Score (NPS), are better positioned to demonstrate tangible results and justify investments in customer experience initiatives.

Implications: Sales enablement must shift from storytelling to evidence. Showcase customer wins with measurable outcomes tied to the buyer's function and industry.

What this means: Value must be demonstrated in performance terms. Think efficiency gains, conversion lifts, or reduced churn, and not "enhanced user engagement" or "strong relationships."

→ **IDC Differentiator:** IDC has earned the IIAR Analyst Firm of the Year award five years in a row, proof of our unmatched credibility and influence with both buyers and sellers.

Sources: IDC Document US52840325
IDC Document US52181325



6. Channel complexity becomes a deal-breaker

Buyers are increasingly evaluating not just the vendor, but the vendor's entire ecosystem. Inconsistent channel experiences, unclear partner roles, or weak integration support are now seen as business risks, not mere inconveniences.

Implication: You must be able to articulate how your partner ecosystem works for the customer. That means surfacing proof of partner readiness, integration maturity, and support depth. **40% of companies worldwide are testing agentic AI solutions, while 27% are already investing significantly in these technologies.**

What this means: Channel strategy is now part of the buyer qualification process. Vendors who cannot demonstrate how their partner network adds value, reduces friction, or accelerates deployment will face disqualification, even if the core product excels. Agentic AI, which enables autonomous decision-making and adaptive learning, is being leveraged to enhance partner communication, automate workflows, and optimize multi-channel processes. This technology is critical for vendors aiming to streamline channel complexity and improve partner engagement across diverse ecosystems.

→ **Strategic Clarity:** IDC's Channel Partner Ecosystem tracks 1.6M+ partner relationships, offering unmatched visibility into partner fit, network strength, and ecosystem strategy.

Source: IDC's Future Enterprise Resiliency & Spending Survey, February 2025.



7. Custom scenarios become the new standard for forecasting

Static forecasts no longer cut it. Boards and budget owners want scenario modeling that reflects their reality, not a general industry trendline. “What if our growth slows?” “What if our AI costs rise faster than expected?” Strategic partners must provide answers to these what-if questions in real time.

Based on IDC's Planning Smartness: AI in Retail Scenario Planning (March 2024), **98.2% of retailers are concerned about future conditions such as inflation, global war, or other uncertainties**, driving the adoption of scenario planning tools to mitigate risks and optimize business outcomes. **Retailers leveraging AI-driven scenario planning have reported 20-70% higher returns on investments by using data-driven approaches to forecast and adapt to changing conditions.** This highlights the growing expectation for dynamic, real-time scenario modeling across industries.

→ **Risk Mitigation:** Scenario planning enables businesses to evaluate risks and prepare contingencies, such as supplier disruptions or cost fluctuations, ensuring operational resilience.

→ **Strategic Optimization:** AI-powered tools allow organizations to model multiple outcomes and align decisions with strategic goals, such as profitability or market expansion.

→ **Innovation and Discovery:** Scenario modeling fosters experimentation with new business processes, uncovering opportunities for efficiency and growth.

Implications: Tools like TAM/SAM/SOM forecasts and dynamic budget models are now part of your sales toolkit. Your ability to adapt your proposal to buyer conditions can make or break the deal.

What this means: Scenario modeling is no longer a planning nice-to-have, it's a buying-stage expectation. Buyers want to see how your solution performs across multiple economic, operational, and regulatory conditions.

→ **Strategic Forecasting:** IDC's Black Book delivers tailored forecasts across 100+ technologies and 75+ global markets, featuring built-in optimistic, pessimistic, and custom modeling scenarios. For added precision, our Custom Analytics solutions adapt insights to your organization's unique priorities and requirements.

Source: IDC Document US51924322



Why this matters now

Your buyers are changing faster than your messaging.

What they care about in 2026:

- Decision confidence, not just data.
- Risk mitigation, not just innovation.
- Impact, not activity.

Are you ready to align your strategy with the critical buyer priorities shaping 2026?

Where will demand shift next? Let's uncover the answers together. Stay connected with IDC on [LinkedIn](#) for continuous insight into demand shifts, buyer trends, and market priorities.

Contact us today to access exclusive insights and start building the roadmap to relevance.

[Contact us](#) →

