The Buyer Has Already Moved: How B2B Procurement Now Starts in a Chat Window

Four Independent Studies, 6,000+ B2B Buyers, One Conclusion

February 2026 · Responsive · 6sense · Forrester · G2 · Combined 6,000+ Buyers

Executive Summary

Four independent studies surveying 6,000+ B2B buyers worldwide converge: the B2B journey has been restructured around AI-mediated discovery. 25% use GenAI more than search, 67% as much or more, and the shift is accelerating quarter over quarter.

50% of B2B software buyers start in AI chatbot — 71% jump in 4 months (G2)	**94%** of buyers use LLMs during buying — 4,510 buyers, $25K+ purchases (6sense)
95% of winners on Day One shortlist — up from 85% prior year (6sense)	**89%** of B2B buyers adopted GenAI — from ~0% in Jan 2024 (Forrester)

1. Four Landmark Studies

Study	Sample	Headline Finding
Responsive (Oct 2025)	350+ buyers	25% use GenAI > search; 67% as much or more; 80% tech buyers; 48% U.S.
6sense (Nov 2025)	4,510 buyers ($25K+)	94% use LLMs; cycle 11.3→10.1 mo; 95% winners on Day One list
Forrester (2024–2025)	Large-scale survey	89% adopted GenAI; 3× consumer rate; 87% better outcomes
G2 (Aug 2025)	1,000+ software buyers	50% start in AI chatbot (#1 source); ChatGPT 47–74% preference

2. Decision Factors: Unchanged

Factor	Data	Source
RFP response quality	81% cite as most important in final decision	Responsive

Factor	Data	Source
Industry expertise	52% rank as top selection factor	Responsive
Price / Product fit	49% / 46%	Responsive
Vendor interactions	16 per person — unchanged from 2023	6sense
Buying committee size	10 people average	6sense
Content consumed	13 pieces (8 vendor, 5 third-party)	6sense

Trust Signal	Data	Implication
Fact-check AI responses	90% click through to sources	Citations must link to quality content
High confidence in AI	Only 20%	AI narrows shortlist; humans decide
Vendor transparency	37% agree (vs 87% of vendors)	Trust gap amplifies with AI synthesis

> **Framework:** Win the AI citation to earn the conversation, then win with expertise, trust, and proposal quality. GEO amplifies rather than replaces go-to-market strengths.

3. The Day One Shortlist Effect

Finding	Data	Source
Winners on Day One shortlist	95% (up from 85%)	6sense
Shortlist size	63% = 2–3 products; 96% ≤5	Capterra/TrustRadius
Prior vendor experience	85% — highest ever	6sense
Creation method	"One-shotting" — single AI prompt	G2

> **Funnel Compression:** Discovery, evaluation, and comparison now happen in a single chatbot window. If you're not cited, you have ≤5% chance of winning regardless of product quality.

4. TRACE Framework (Responsive)

Dimension	Question	GEO Relevance
Trustworthiness	Reliable, backed by verifiable sources?	AI vendor descriptions often incomplete/outdated
Relevance	Addresses specific question/context?	Generic content loses to context-specific
Accuracy	Factually correct and current?	Only 37% say vendors are transparent
Completeness	Covers all necessary aspects?	Gaps create blind spots buyers can't see
Explainability	Reasoning/sources can be verified?	90% of buyers click through to verify

5. Who's Leading the Shift

Segment	Data	Implication
Tech sector	80% use GenAI ≥ search; 56% chatbots top source	Most immediate urgency
Gen Z	15% of B2B buyers; 86% AI daily; 3.6 tools	Growing committee share, AI-native
Enterprise (2K+)	42% GenAI for discovery vs 18% (501–1K)	Large enterprises lead, not startups
U.S. buyers	48% GenAI vs 14% other regions	U.S. = immediate battleground

6. The Preparedness Gap

Metric	Data	Source
AI-ready content (75–100%)	Only 11%	10Fold
Tracking AI search	Only 16%	McKinsey
GEO vs SEO performance	Lags 20–50%	McKinsey
AEO category growth	7 → 150+ in 10 months	G2
GEO as #1 success metric	35% (above brand, SEO)	Industry survey
Plan to increase AI usage	53% of buyers next year	Responsive

7. Three Non-Negotiable Actions

Action	What to Do	Why
1. Audit AI presence	Search your brand/categories in ChatGPT, Perplexity, AI Overviews	95% winners on Day One list; 50% start in AI chat
2. Content for citation	Ungated, structured, answer-first; FAQ, comparisons, research	90% fact-check sources; only 5–10% brand website cited

Action	What to Do	Why
3. Measure citations	Track citation frequency, share of voice, competitive position	Only 16% track; 53% buyers increasing AI use

Sources

Responsive (350+ buyers, Oct 2025), 6sense (4,510 buyers, Nov 2025), Forrester Buyers' Journey Survey (2024–2025), G2 AI Search & Buyer Behavior (1,000+ buyers, Aug 2025). Additional: TrustRadius, Capterra, eMarketer, McKinsey, 10Fold, Princeton GEO research.

Is Your Brand on the Day One Shortlist?

Visit **portal.gracker.ai** for a free AI visibility audit or **gracker.ai/demo** to book a strategy session.