

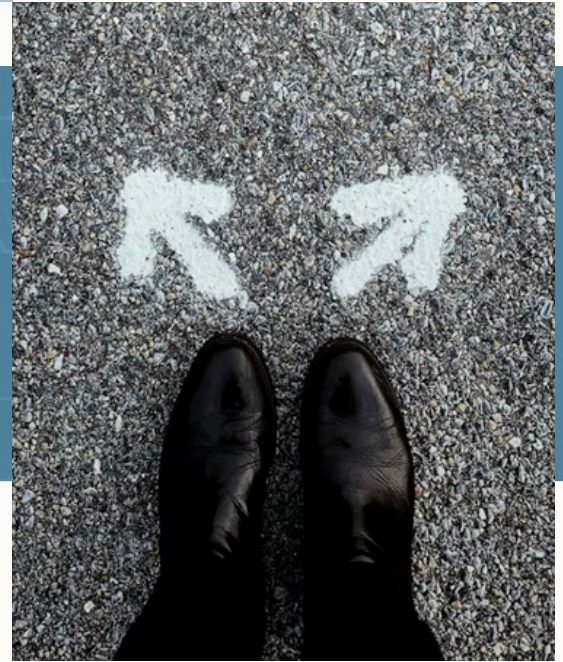


VML REWIRE²⁶

The 15 Disrupting Forces Reshaping B2B

April 2026

Watch-outs for the next era of B2B — and how **connected brands** can win.



B2B marketing is undergoing one of the most significant transformations in decades. Buyer behavior is shifting. Artificial intelligence is reshaping discovery and evaluation. And the experiences brands create increasingly determine whether decisions move forward — or stall. Across industries, a new reality is emerging:

The biggest threat to B2B growth is not competition — it is buyer indecision.

Buying decisions are becoming harder to make. Stakeholders multiply, risk perception rises, and internal alignment becomes more difficult. Even strong vendors lose deals not because another provider wins — but because buying teams

cannot justify moving forward. In this environment, a new truth defines successful B2B brands:

Confidence
is the currency
of B2B
decision-making.



Confidence in B2B decisions is becoming harder to achieve.

Buying groups are expanding into **buying networks** that include not only internal stakeholders but also partners, advisors, industry experts and increasingly AI systems that shape vendor discovery and evaluation.

■ Decision processes are therefore becoming **both more distributed and more risk-sensitive**.

■ Buyers are not simply choosing the best solution. They are choosing the solution they can **justify and defend internally**.

■ As a result, **proof is replacing reputation as the primary driver of confidence**. Case studies, benchmarks, peer validation, trials and ecosystem endorsements are increasingly required to move decisions forward.

■ Credibility is also flowing through partner ecosystems, where trusted platforms, alliances and experts reinforce vendor legitimacy — a dynamic often described as trust transference.

■ At the same time, generative AI and predictive data signals are reshaping how buyers discover, research and shortlist vendors.

■ Traditional marketing funnels are compressing as AI enables buyers to research, compare and evaluate vendors within a single interaction.

Together these shifts are forcing organizations to rethink how they engage the market. This report identifies **15 forces reshaping B2B marketing and decision-making**. Each of these forces either **erodes confidence in buying decisions** — or creates opportunities for brands to strengthen it.

This is not a trend list.

It is a practical framework to help organizations understand where buyer confidence is breaking down — and how connected B2B brands can rebuild it.



The three clusters of disrupting forces in B2B

The forces reshaping B2B are wide-ranging, but they cluster into three clear disruption zones. **Each cluster** reflects a different dimension of how confidence is either eroded or strengthened in the modern buying environment. Together, they provide a structured way to understand the pressures acting on B2B organizations today and the opportunities for connected B2B brands to lead.

These clusters represent real-world fault lines where buyer uncertainty is growing, where indecision accelerates, and where brands must intervene decisively to build confidence.



Buyer System Shifts

Why B2B decision-making is becoming harder



Technology, Data and AI Disruptions

How discovery, targeting and evaluation are being transformed



Customer Experience Shifts

How brands build confidence and preference

What it means for B2B brands

Having outlined the **three disruption clusters reshaping the B2B landscape**, the next section dives into the individual forces within each group. These forces are not isolated trends; they are the practical manifestations of the pressures acting on today's buying environments. Each one represents a specific way in which confidence is either undermined or reinforced across the buying network.

By examining them individually, we reveal where decision-making breaks down, where risk perception spikes, and where Connected B2B brands have the greatest opportunity to engineer clarity, trust and momentum. What follows is a closer look at the disrupting forces shaping B2B today – and how brands can respond with confidence as their competitive advantage.

Dr. Andreas Ortner & Bill Burkart

GLOBAL VML PRACTICE LEADERS

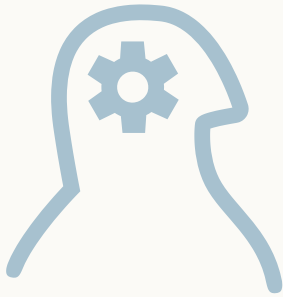
vml.com/expertise/b2b





Buyer System Shifts

Why B2B decision-making is becoming harder



The Buyer System

How B2B decision-making is changing

The traditional B2B buying model — where a defined group of internal stakeholders evaluates vendors through a relatively linear process — is evolving into a far more complex system. Decisions increasingly involve wider networks of influence, additional internal stakeholders and greater scrutiny of risk. As buying networks expand and consensus becomes harder to achieve, the biggest challenge for vendors is no longer simply persuading buyers, but helping them navigate complexity and reach a decision.

- **Buying Groups Expand Buying Networks – Page 8**
- **Shadow Stakeholders Take Control – Page 9**
- **Decision Risk and Indecision Becomes the Primary Barrier – Page 10**
- **Decision Defensibility Becomes the Central Buying Criterion – Page 11**
- **Customer Obsession Becomes a Competitive Imperative – Page 12**

Connected B2B brands respond by building:





Buying Groups Expand into Buying Networks

B2B decisions are no longer made solely by internal buying groups. Instead, they increasingly involve broader buying networks that include internal stakeholders, external advisors, partners and industry peers who influence how vendors are evaluated and selected.

72% of buyers trust industry peers more than provider executives.

(Forrester, Buying Networks: Your Buyers' New Reality, 2025, p.3)

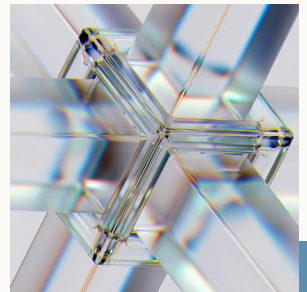
On average, **13 internal stakeholders** and nine external participants influence purchasing decisions.

(Forrester, The State of Business Buying, 2026, p.3)

35% of younger buyers say

10 or more external participants are involved in purchase decisions.

(Forrester, Buying Networks: Your Buyers' New Reality, 2025, p.3)



How it shows up in B2B marketing

Buyers increasingly validate vendor options through conversations with peers, industry communities and trusted advisors before engaging directly with suppliers.

What brands need to do

B2B marketing must influence the wider buying network, not just the internal buying group. Customer advocacy, peer storytelling and credible thought leadership help ensure that when buyers seek external validation, the signals they encounter reinforce confidence in the brand.



Shadow Stakeholders Take Control

Influence in B2B purchasing is shifting toward stakeholders who historically played supporting roles in decisions, including procurement, finance, legal, IT and security teams.

Procurement participates in 53% of B2B buying decisions,
second only to the C-suite

(Forrester, The State of Business Buying, 2026)



Hidden stakeholders in functions such as legal, finance and procurement hold roughly
half of total decision influence.

(LinkedIn, Bain & Company, The Five Rules of Buyability, 2025)

Brands are
over 20x more likely to win
when the full buying network knows them early in the process.

(LinkedIn, Bain & Company, The Five Rules of Buyability, 2025)

How it shows up in B2B marketing

Deals often slow down when risk-focused stakeholders introduce new evaluation criteria around compliance, cost structures or integration.

What brands need to do

Marketers should address these stakeholders earlier in the buyer journey. Clear proof around ROI, security, compliance and integration helps internal champions navigate procurement and financial scrutiny.





Decision Risk and Indecision Become the Primary Barrier

The biggest barrier to winning B2B deals is increasingly not competition from another vendor but the inability of buying networks to reach consensus.

40% of B2B deals end in no decision because buyers cannot reach consensus.

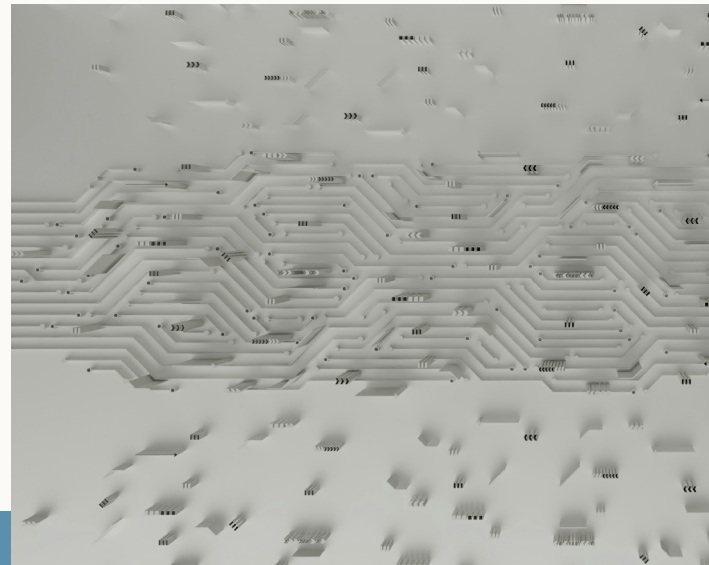
(LinkedIn & Bain & Company, The Five Rules of Buyability, 2025)

86% of B2B purchases stall at some point in the buying process.

(Forrester, Buying Networks: Your Buyers' New Reality, 2025)

75% of marketers report that buyers are taking longer to commit to purchases than a year earlier.

(Forrester, Buying Networks: Your Buyers' New Reality, 2025)



What brands need to do

Vendors increasingly win by enabling decisions rather than simply promoting solutions. Structured evaluation tools, proof-of-value programs and clear comparison frameworks help buying networks move forward.

How it shows up in B2B marketing

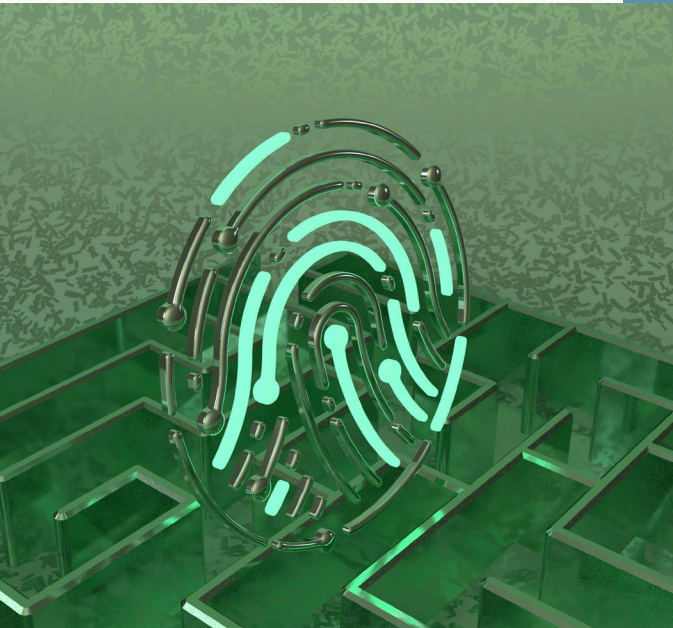
Buying networks gather extensive information but struggle to align on priorities and acceptable risk levels, lengthening decision cycles..



4

Decision Defensibility Becomes the Central Buying Criterion

In complex buying environments, decisions are increasingly shaped by how defensible they are internally rather than purely by which solution performs best.



34% of buyers say the most important emotional driver is being able to defend the decision if it goes wrong.

(LinkedIn, Bain & Company, The Five Rules of Buyability, 2025)

Three of the five most important emotional drivers relate to group dynamics and defensibility.

(LinkedIn, Bain & Company, The Five Rules of Buyability, 2025)

How it shows up in B2B marketing

Buying networks gravitate toward vendors that feel safe to choose. Recognized brands and widely adopted solutions often win because they reduce perceived organizational risk.

What brands need to do

Proof must become central to the buyer experience. Case studies, benchmarks and financial models help buyers justify decisions internally.



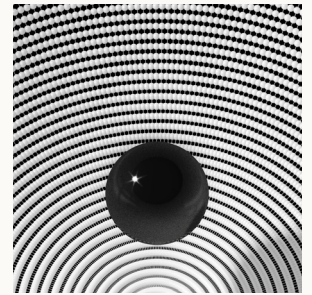
Customer Obsession Becomes a Competitive Imperative

Leading B2B organizations are shifting from product-centric thinking toward operating models centered on customer outcomes and long-term value creation.

Customer-obsessed companies grow revenue 1.7x faster

than less mature organizations.

(Forrester, The State of Customer Obsession in B2B, 2025)



How it shows up in B2B marketing

Customer-obsessed organizations organize insights, investment and experiences around helping customers achieve outcomes rather than promoting products.

What brands need to do

Marketing should anchor strategy in a deep understanding of buying journeys, customer goals and business outcomes.

98% of leaders at customer-obsessed firms say they deeply understand customer needs, compared with 68% at other organizations.

(Forrester, The State of Customer Obsession in B2B, 2025)

In 2025, **only 5%** of B2B organizations qualified as truly customer-obsessed.

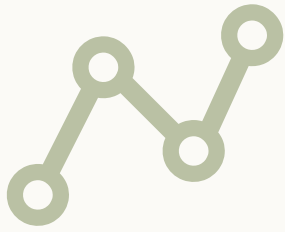
(Forrester, The State of Customer Obsession in B2B, 2025)





Technology, Data, and AI Disruptions

How discovery, targeting and evaluation are being transformed



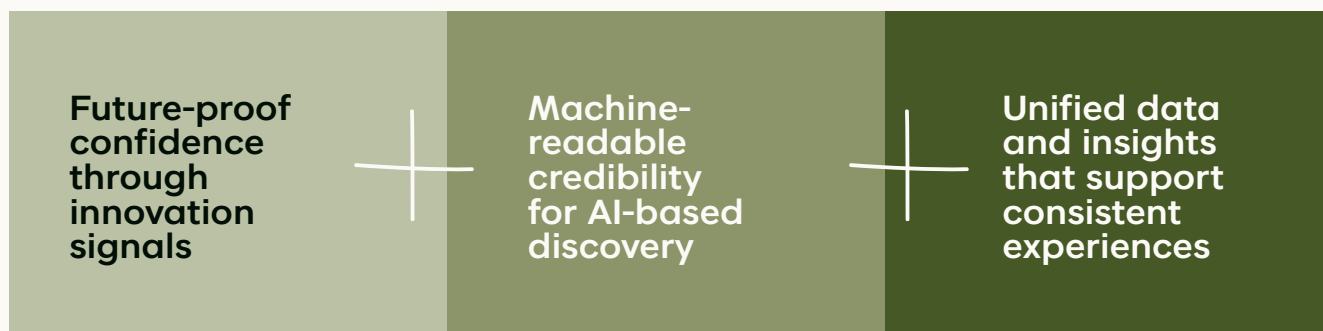
Technology, Data & AI

How discovery and targeting are changing

Technology is fundamentally reshaping how B2B buyers discover, research and evaluate vendors. AI-powered search, predictive signals and advanced analytics are changing how demand is detected and influenced. As these technologies become embedded across the buying journey, go-to-market strategies are shifting from campaign-driven approaches to continuous systems that detect intent, prioritize opportunities and influence buyers earlier.

- **GenAI Collapses the Funnel – Page 15**
- **Synthetic Audiences Transform Insight, Testing and Validation – Page 16**
- **Predictive Signals Transform Targeting – Page 17**
- **Data Unification Becomes Non-Negotiable – Page 18**
- **AI-Native Go-to-Market Models Emerge – Page 19**

Connected B2B brands respond by building:





GenAI Collapses the Funnel

Generative AI is reshaping how buyers research vendors and evaluate solutions, compressing discovery, comparison and shortlisting into earlier stages of the buying journey.

Nearly two-thirds of B2B buyers use generative AI

as much as or more than traditional search engines when researching vendors.

(Meta Analysis, Generative AI Search vs Traditional SEO: Impact on B2B Buyer Behavior, 2025)

Preference for engaging sales representatives only late in the process has increased by 17 percentage points.

(Meta Analysis, Generative AI Search vs Traditional SEO: Impact on B2B Buyer Behavior, 2025)

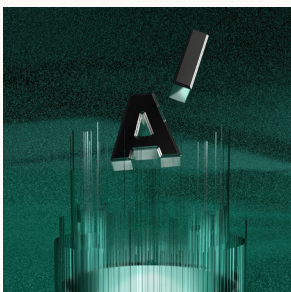
Buyers complete roughly

70% of the buying journey before engaging a vendor.

(Meta Analysis, Generative AI Search vs Traditional SEO: Impact on B2B Buyer Behavior, 2025)

How it shows up in B2B marketing

Buyers increasingly use AI tools to compare vendors, summarize complex information and shortlist providers before speaking with sales teams. Vendor discovery and evaluation are increasingly happening in AI-mediated environments.



What brands need to do

Brands must ensure their expertise is visible in AI-mediated discovery. Authoritative content, credible sources and structured knowledge increase the likelihood that AI systems surface their insights during buyer research.



Synthetic Audiences Transform Insight, Testing Validation

AI-powered simulations allow marketers to test messaging, campaigns and propositions using synthetic audiences before launching them in the market.



75% of organizations say AI has forced them to rethink their digital transformation and go-to-market strategies.

(VML, Unlocking the Power of Digital Transformation in B2B, 2025)

Customer-obsessed companies are twice as likely to invest in generative AI technologies for visual content, genAI for language, and AI agents.

(Forrester, The State of Customer Obsession in B2B, 2025)

What brands need to do

Adopt faster experimentation cycles. AI-enabled testing allows teams to refine messaging, validate positioning and reduce the risk of large-scale marketing investments.

How it shows up in B2B marketing

Marketing teams increasingly simulate campaign concepts, test messaging variations and evaluate creative approaches using AI before committing major budgets.





Predictive Signals Transform Targeting

Intent signals and company-level behavioral data allows marketers to identify buying activity earlier and prioritize high-value opportunities.

A strong signal-based data foundation can reduce cost per qualified lead by **39%**

(LinkedIn, From Optics to Outcomes, 2025)

Predictive signals lead to **81%** more closed or won deals.

(LinkedIn, From Optics to Outcomes, 2025)

How it shows up in B2B marketing

Marketing teams increasingly track behavioral signals such as research activity, hiring trends and technology adoption to identify potential buying activity.

Company-level data signals enable brands to reach **287%** more relevant companies.

(LinkedIn, From Optics to Outcomes, 2025)

What brands need to do

Shift from broad targeting to signal-based engagement. Align marketing and sales around shared intent data to prioritize accounts more effectively and focus resources where demand is emerging.



Data Unification Becomes Non-Negotiable

Fragmented data across marketing, sales and customer systems is becoming one of the biggest barriers to effective B2B engagement.

60% of B2B leaders say data silos hinder digital transformation initiatives.

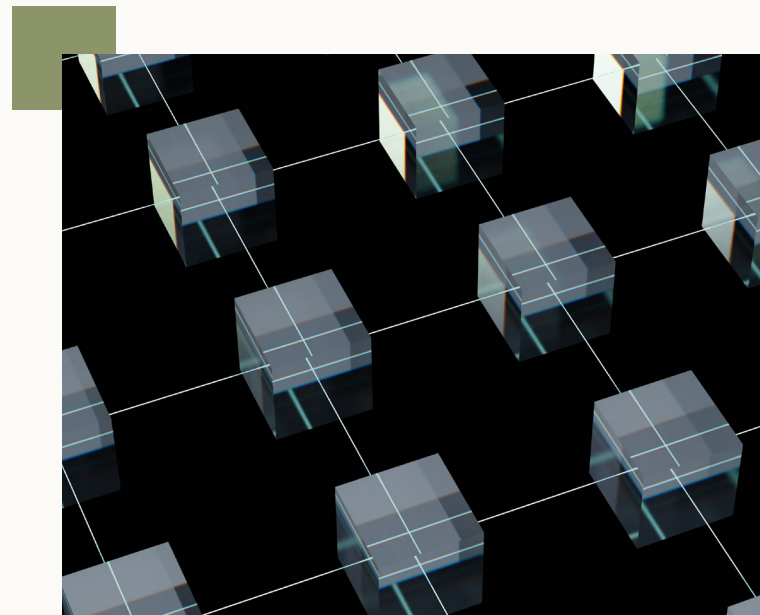
(VML, Unlocking the Power of Digital Transformation in B2B, 2025)

56% say their data maturity is insufficient to support advanced digital technologies

(VML, Unlocking the Power of Digital Transformation in B2B, 2025)

57% of business leaders struggle to translate fragmented data into actionable insights.

(VML, Unlocking the Power of Digital Transformation in B2B, 2025)



What brands need to do

Invest in unified data foundations that connect marketing, sales and customer platforms. Integrated data enables better targeting, clearer insight and more coordinated engagement across the buying journey.

How it shows up in B2B marketing

Disconnected systems make it difficult to identify buying signals, personalize engagement or measure the impact of marketing activity.

10

AI-Native Go-to-Market Models Emerge

AI is evolving from a supporting capability to a core operating logic shaping how marketing and sales teams plan, execute and optimize go-to-market activity.



57% of B2B leaders identify AI as the top priority in digital transformation initiatives.

(VML, Unlocking the Power of Digital Transformation in B2B, 2025)

98% customer-obsessed firms say they adopt new technologies earlier than competitors.

(Forrester, The State of Customer Obsession in B2B, 2025)

How it shows up in B2B marketing

AI increasingly powers segmentation, campaign optimization, content generation and revenue forecasting. As buying journeys become nonlinear and AI-mediated, traditional attribution models are becoming less reliable.

What brands need to do

Move beyond experimentation and embed AI across planning, execution and measurement. AI-enabled operating models allow teams to respond to market signals faster and optimize performance continuously. Leading organizations are adopting approaches such as marketing mix modeling and causal measurement to better understand marketing impact.



Customer Experience Shifts

How brands build confidence and preference



Customer Experience

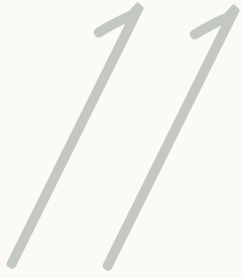
How brands build confidence and preference

As buying decisions become more complex and risk-sensitive, confidence has become the currency of B2B marketing. Buyers increasingly rely on credible proof, trusted networks and meaningful experiences to validate decisions. Marketing therefore plays a critical role in designing interactions that build trust and reduce uncertainty throughout the buying journey.

- Responsible AI Becomes a Brand Attribute – Page 22
- Sales Enablement Becomes the Defensibility Engine – Page 23
- Ecosystems and Partnerships Transfer Trust – Page 24
- Video and Social Become Core Decision Channels – Page 25
- Events Re-emerge as Trust Accelerators – Page 26

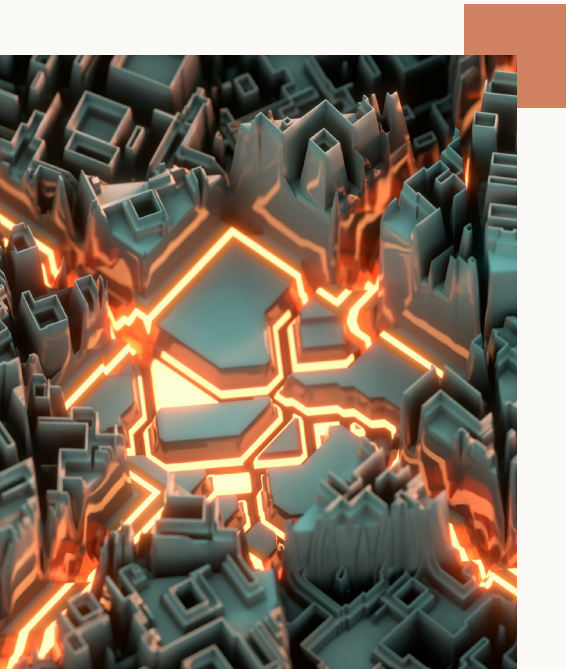
Connected B2B brands respond by building:





Responsible AI Becomes a Brand Attribute

As AI becomes embedded across the buyer journey, trust in how organizations use and govern AI becomes part of brand perception.



One in five buyers report lower confidence after encountering unreliable AI-generated information.

(Forrester, The State of Business Buying, 2026)

90% of buyers
verify AI-generated answers
by checking original sources.

(Meta Analysis, Generative AI Search vs Traditional SEO: Impact on B2B Buyer Behavior, 2025)

How it shows up in B2B marketing

Buyers increasingly consume industry insights, thought leadership and product education through social feeds and video.

What brands need to do

Invest in video-first storytelling and activate subject-matter experts on professional platforms to build credibility and reach.

12

Sales Enablement Becomes the Defensibility Engine

In a high-risk environment, sales enablement becomes central to helping buyers justify decisions internally.

Defensibility is the #1 emotional driver of choice.

(LinkedIn, Bain & Company, The Five Rules of Buyability, 2025)

High-quality thought leadership

is used as a more reliable evaluation tool than data sheets.

(Edelman–LinkedIn Thought Leadership Impact Study, 2025).

Implementation clarity reduces perceived downside risk.

(LinkedIn, Bain & Company, The Five Rules of Buyability, 2025)



What brands need to do

Brands must front-load credibility. Clear positioning, structured product information, strong third-party validation and easily extractable proof points are essential so that AI tools — and buyers — can quickly understand

How it shows up in B2B marketing

Buyers request ROI calculators, implementation road maps, case studies from similar organizations and clear risk mitigation plans. Sales teams need structured proof to support internal conversations.

13

Ecosystems and Partnerships Transfer Trust

Trust increasingly flows through networks of partners, employees, experts and influencer's rather than through brands alone.

87% of buyers prefer credible content from trusted industry influencer's over branded content.

(LinkedIn, The B2B Multiplier Effect, 2025)

Reaching the full buying network can increase lead generation by 50%.

(LinkedIn, The B2B Multiplier Effect, 2025)

Brands generate **2.4x** more leads when employees of target accounts follow their company page.

(LinkedIn, The B2B Multiplier Effect, 2025)



How it shows up in B2B marketing

Buyers rely heavily on trusted voices across their professional networks when evaluating vendors.

What brands need to do

Leverage ecosystems strategically. Partner programs, expert collaborations and employee advocacy amplify credibility across the buying network. Forrester refers to this dynamic as "trust transference" — the ability for organizations to borrow credibility from trusted partners, experts and ecosystem relationships.

14

Video and Social Become Core Decision Channels

Professional social platforms and video formats are becoming central channels for discovery, learning and credibility building in B2B.

55% of B2B marketers say short-form video delivers the highest ROI.

(LinkedIn, Art & Science of Video, 2025)

LinkedIn video posts are shared **20x** more than other formats.

(LinkedIn, Art & Science of Video, 2025)

GenZ professionals watched **82%** more video last year.

(LinkedIn, Opening Keynote – Where Marketing Means Business, 2025)



How it shows up in B2B marketing

Buyers increasingly consume industry insights, thought leadership and product education through social feeds and video.

What brands need to do

Invest in video-first storytelling and activate subject-matter experts on professional platforms to build credibility and reach.

15

Events Re-emerge as Trust Accelerators

In-person events are regaining importance as environments where buyers validate ideas, learn from peers and build confidence in vendors..



Featuring experts on conference stages can increase content engagement by 70%.

(LinkedIn, Art & Science of Video, 2025)

Featuring executive experts leads to a

53% lift in engagement.

(LinkedIn, Art & Science of Video, 2025)

17% of buyers rely on conferences and trade shows throughout the buying journey.

(Forrester, The State of Business Buying, 2026)

What brands need to do

Design events as environments for insight exchange and peer learning that strengthen relationships and build authority.

How it shows up in B2B marketing

Buyers attend events not only to discover vendors but to validate ideas through conversations with peers and experts.

VML REWIRE has arrived:

Taken together, these **15 forces** point to a clear reality. Growth in B2B is no longer constrained by awareness or even competition — it is constrained by your buyers' confidence in your brand. Buying networks are larger. AI is reshaping discovery. Risk sensitivity is rising. Decision cycles are less predictable. In this environment, incremental optimization is not enough. What is required is deliberate design.

Four implications stand out.

■ **Brands must engage the full buying network.** Preference is increasingly formed before formal evaluation begins. Visibility, clarity and credibility must be established early — and across the entire network of stakeholders shaping the decision.

■ **Defensibility must be engineered into every touchpoint.** Buyers need proof they can justify internally: financial clarity, implementation certainty, peer validation and risk mitigation. Marketing, sales and enablement must align around helping customers make safe, confident decisions.

■ **Data and AI must be integrated responsibly.** The organizations that win will not be those that adopt the most tools, but those that connect data, signals and governance into a coherent system that supports better decisions.

■ **Finally, experience must be connected.** Brand, content, commerce, enablement and service cannot operate in isolation. Confidence is built when every interaction reinforces the same clear story. This is the confidence shift. And it is already underway.

VML REWIRE^{'26}

The 15 Disrupting Forces Reshaping B2B

For B2B marketers, the opportunity is significant.

Those who understand these forces — and act deliberately in response — can turn volatility into advantage.

At **VML**, we help organizations design connected B2B brands that build confidence across the entire buying journey — from strategy and insight, through creative and experience, to data, AI and enablement.

If these forces resonate with what you are seeing in your market, we would welcome the conversation. Let's explore how to translate them into a tailored growth strategy for your business.

Dr. Andreas Ortner & Bill Burkart

GLOBAL VML PRACTICE LEADERS

vml.com/expertise/b2b





Sources

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- Buying Networks: Your Buyers' New Reality (2025)
- The State of Business Buying (2026)
- The State of Customer Obsession in B2B (2025)

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