CARBON

B2B Buyer’s Report 2026

BRAND ATTRACTION & DEFECTION

SEPTEMBER 2026

Why satisfied buyers still reconsider, and what makes B2B brands easier to choose and harder to replace.

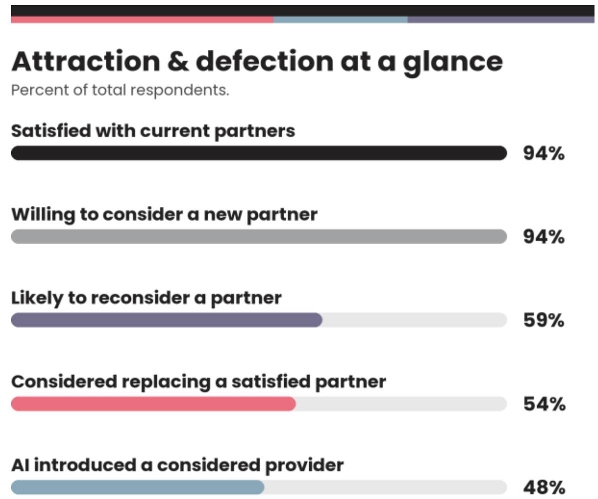
Executive Summary

B2B satisfaction is no longer a safe zone. While 94% of decision-makers are satisfied with their current partners, 59% expect to review or reconsider at least one partner in the next year, and 54% have considered replacing a partner despite being generally satisfied with its performance. The greatest threat to an incumbent may not be poor performance, but a competitor that makes its value, expertise, and business case easier to understand and defend. Based on a proprietary survey of 189 B2B decision-makers, the findings reveal what makes brands easier to discover, more credible under scrutiny, and harder to replace. Across attraction, switching, and retention, the mandate is clear: make proven results, trust, value, and defensible ROI visible at every stage of the relationship. The margin of error for this survey is ±7.13% at a 95% confidence interval.

PART 1: SETTING THE TONE: ATTRACTION & DEFECTION

Entering the B2B danger zone: The heart of brand attraction & defection.

Being satisfied with a B2B partner no longer means being closed to alternatives. Most buyers are satisfied with current partners, yet many are still willing to review, reconsider, or replace them. The risk is not limited to failed relationships. It also emerges when budget pressure, leadership scrutiny, or a better-framed alternative makes an incumbent harder to defend. For B2B brands, growth and retention now depend on the same discipline: making value, proof, and relevance visible enough to attract new buyers and keep existing customers from drifting.

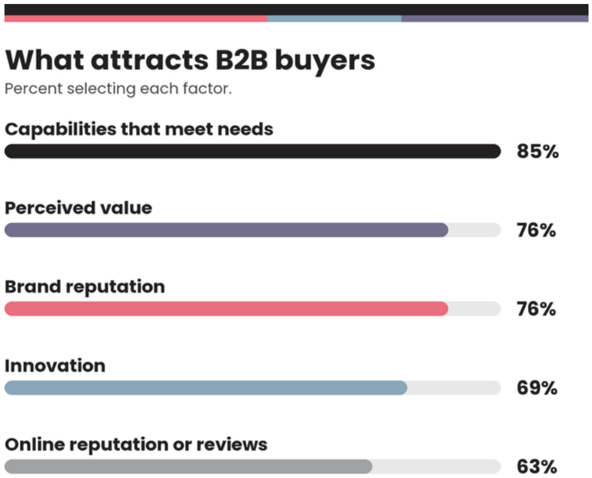


ATTRACTION

Clients may already be shopping around. Most partners just don't realize it.

Attraction in B2B is often misunderstood as awareness. But awareness alone does not make a buyer research further, forward a link, ask a peer, open a sales conversation or add a company to a shortlist. The data suggests attraction is more practical: buyers are pulled toward brands that make relevance easy to recognize, value easy to understand, and the business case easy to believe.

B2B buyers are not asking brands to be louder. They're asking brands to be easier to understand, easier to trust, and easier to justify.



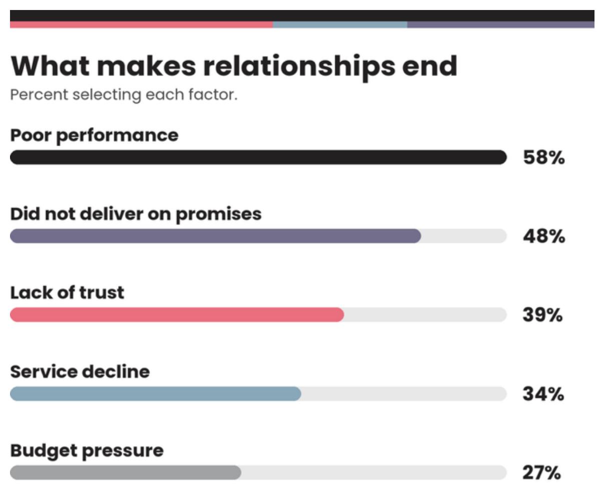
The strongest attraction signals are not vague brand feelings. They are evidence that a partner can solve the buyer's problem. Capabilities lead the list, followed by perceived value and brand reputation, which are tied, then innovation and online reputation or reviews. Together, they point to a clear pattern: relevance gets a brand noticed, but credibility and value give buyers a reason to keep looking.

Implication for B2B brands: *Attraction is built before the first conversation. Brands need positioning, content, proof, paid media, social presence, and digital experiences that make the buyer's next step feel obvious. Your next best customer may already be satisfied with someone else and still looking. And that is where attraction becomes an incumbent's retention problem: the same signals that pull prospects toward a new partner can pull satisfied customers away from an existing one.*

DEFECTION

Your customers can be happy and still be halfway out the door.

The defection side of the story deserves closer attention. The research does not show a market full of unhappy customers waiting to revolt. It shows something more dangerous: customers who are satisfied, but still willing to reconsider. Buyers do not need a failed relationship to become open to a better alternative.



Satisfaction is no longer a complete retention strategy. It is the baseline. A satisfied buyer may stay, but satisfaction alone does not answer the harder questions that surface during budget reviews, leadership changes, procurement cycles or strategic pivots. Is this partner still the best option? Can we prove the value? Is there a more specialized alternative? Is someone else innovating faster? Is the relationship easy to defend?

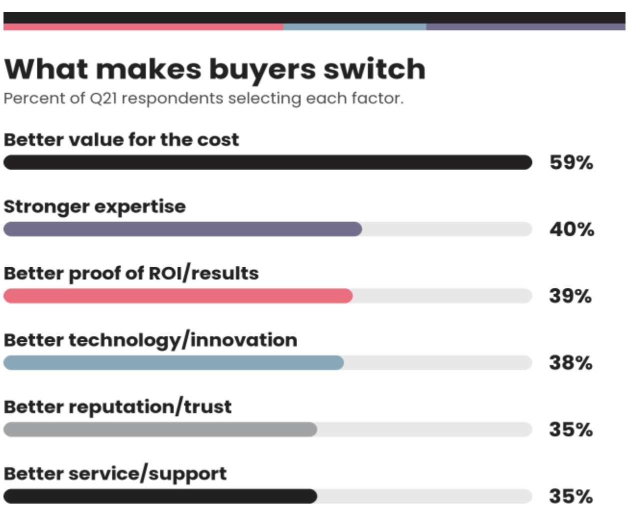
The data on relationship enders shows that defection still begins with fundamentals. But the more interesting layer is that 19% say a better alternative emerging can end a relationship, even though larger relationship-ending risks include poor performance, missed promises, lack of trust, and service decline. That is not failure in the traditional sense. That is competitive displacement.

***Implication for B2B brands:** Retention requires a visible, ongoing value story. Brands have to keep proving why the relationship is still worth defending, especially when a new alternative appears. The most dangerous competitor is not always the one replacing you today. It is the one making your buyer question you tomorrow.*

THE SWITCH MOMENT

Incumbents do not lose only when they fail. They lose when someone becomes easier to justify.

Defection is not only a push story. It is also a pull story. Buyers may leave because performance declines, trust breaks or service erodes. But they may also leave because another partner creates a stronger business case. In the respondent-level calculation, better value for the cost is the leading switch driver, selected by 59% of respondents.



The next tier of switch drivers reveals the anatomy of a stronger alternative: expertise, proof of results, technology and innovation, reputation and trust, and customer service. These aren't simply reasons to switch. They are competitive narratives - each gives a buyer a reason to believe another partner may be easier to justify.

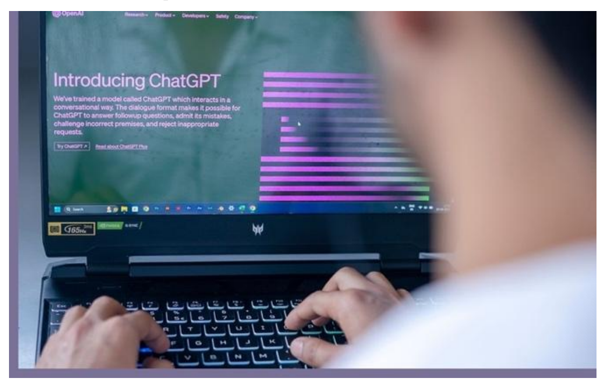
PART 2: INSIDE THE B2B BUYER'S DECISION

The B2B Buyer Profile

The study is built on 189 quality-filtered B2B decision-makers with meaningful influence over partner selection. Nearly eight in ten respondents are either final decision-makers or part of the decision-making group, giving the findings a direct view into how B2B partners are evaluated, selected, and retained.

Respondents span roles, company sizes, and industries, with more than half working at organizations with 250 or more employees. The result is a broad view across both mid-market and enterprise buying environments.

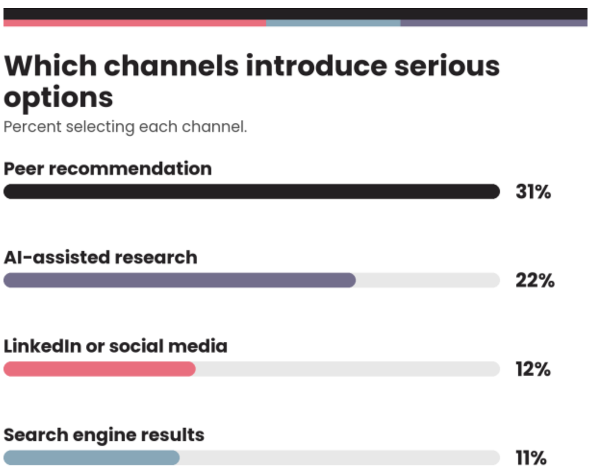
B2B discovery is becoming a credibility hunt



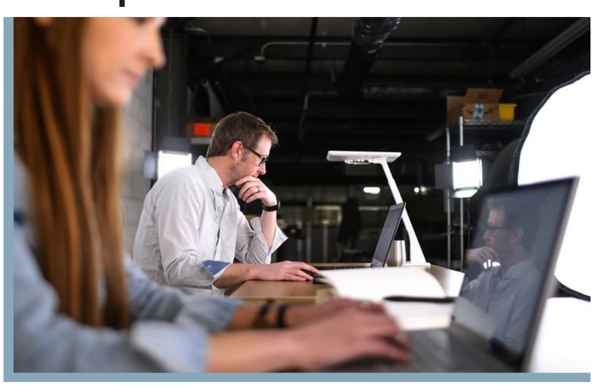
Partner discovery begins less like a linear funnel and more like a credibility hunt. Buyers start with sources that help them reduce uncertainty quickly: existing professional networks (51%), search engines (49%), and peer recommendations or word of mouth (47%) are the most common first sources used when organizations begin looking for a new B2B partner. The implication is that discoverability and reputation work together. A brand must be findable, but it also has to show up with enough credibility to survive the first screen.

The trigger for a search is often proactive, not purely corrective. Exploring new opportunities is the most common catalyst at 46%, ahead of the need for better performance or results (35%), growth initiatives (35%), and cost or budget pressure (34%). That pattern suggests buyers are not only going to market when something is broken. They are also scanning for partners who can help them grow, improve, or make a stronger business case than the status quo.

When respondents are forced to choose the one channel most likely to introduce a new B2B brand they would seriously consider, the balance shifts from search behavior to trust transfer. Peer recommendation leads at 31%, followed by AI-assisted research at 22%, LinkedIn or social media at 12%, and search engine results at 11%. That distinction matters. Search can make a brand findable, but recommendation, social proof, and increasingly AI help make it credible enough to consider. Being found gets a brand into the process. Credibility gets it into the consideration set.



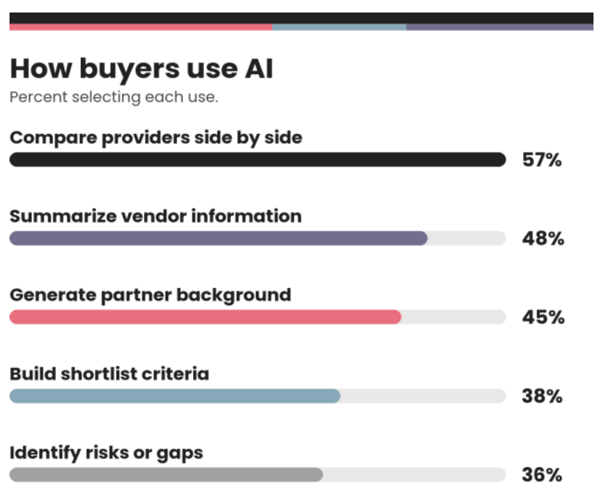
AI Adoption and Trust



AI is no longer a fringe research tool in B2B partner evaluation. It is no longer simply helping buyers research known options—it is introducing new ones. Nearly half of respondents (48%) say an AI tool has introduced a vendor, agency, or provider their organization seriously considered and might not have discovered otherwise. Seventy-eight percent of respondents use AI tools to research potential partners at least sometimes, including 24% who use them very often and 28% who use them often. One year earlier, 61% reported using AI at least sometimes, which points to a fast-moving shift in how buyers gather context before they speak with a vendor.

The role AI plays is practical and comparative. Respondents most often use AI to compare providers side by side (57%), summarize vendor information (48%), generate background information on a partner (45%), build shortlist criteria (38%), and identify risks or gaps (36%). These use cases show AI functioning less as a replacement for judgment and more as a compression layer: it helps buyers get oriented, sharpen questions, and decide which claims deserve closer inspection.

Trust in AI is meaningful but not unconditional. Fifty-eight percent mostly or completely trust AI-generated information when evaluating potential business partners, while another 31% trust it somewhat. Nearly half of respondents (48%) say an AI tool has introduced a vendor, agency, or provider their organization seriously considered and might not have discovered otherwise. For brands, AI visibility is becoming part of discoverability. The opportunity is not simply to “optimize for AI,” but to make capabilities, expertise, differentiation, and proof clear enough for both buyers and AI systems to understand, compare, and trust.

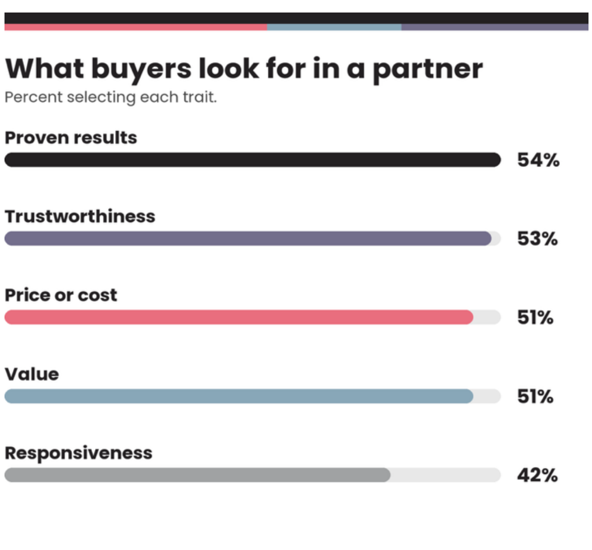


Key Partner Traits & Evaluation Criteria

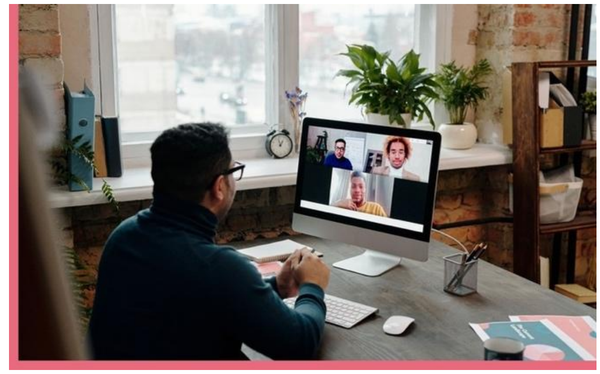
The research points to a buyer mindset organized around proof. When respondents select the single most important trait of an ideal B2B partner, proven results leads at 24%, followed by trustworthiness at 18% and value for the investment at 14%. Industry expertise, ease of working together, innovation, responsiveness, and strategic thinking all matter, but the top of the list is anchored in whether the partner can be believed and defended.

The broader selection criteria reinforce the same story. More than half of respondents identify proven results (54%), trustworthiness (53%), price or cost (51%), and value (51%) as important when choosing a B2B partner. Responsiveness follows at 42%, with relevant expertise (40%), innovation (35%), ROI proof, industry experience, strategic thinking, and ease of implementation each contributing to the decision. Buyers are not choosing on one attribute; they are assembling a case where the partner can perform, fit, and justify the spend.

Across initial attraction and final evaluation, the pattern is consistent: relevance earns attention, but proof, trust, and value make a choice defensible. B2B buyers aren't simply deciding which partner they prefer. They're assembling the case for a decision they may need to justify to others.



Retention Drivers



Retention is strongest when the relationship gives buyers something they can continue to defend. Established trust is the leading reason organizations stay with an existing B2B partner, selected by 51% of respondents. Proven results follow at 47%, a good relationship with the team at 45%, and competitive pricing at 42%. This is a useful corrective to the idea that retention is only emotional or only contractual. It is both relational and evidentiary.

Satisfaction is high, but it should not be mistaken for immunity. Ninety-four percent of respondents are at least somewhat satisfied with their current B2B partners, including 38% who are very satisfied. At the same time, 53% say their organizations are open to new vendors but usually keep existing partners, and 24% say they actively explore new options regularly. The dominant posture is not dissatisfaction; it is conditional openness.

Other retention factors are more defensive, but they matter less than trust and performance. Contractual commitment is selected by 27%, easier implementation by 24%, internal familiarity by 24%, and switching difficulty by 18%. These forms of inertia can slow movement, but they are weaker than the positive reasons to stay.

The clearest retention strategy is not to make switching hard; it's to make staying easy to justify.

Switching Drivers

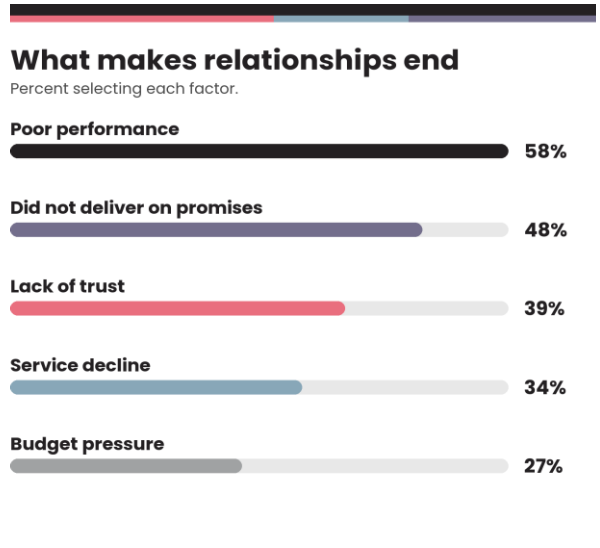
The switch moment is where attraction and defection meet. Better value for the cost is the top switch driver, selected by 59% of Q21 respondents. That finding is not simply a price story. It suggests buyers are weighing the full business case: what they get, what it costs, how clearly the outcome can be defended, and whether the alternative makes the incumbent look harder to justify.

The next tier of switch drivers shows how buyers define a stronger alternative. Stronger expertise or specialization is selected by 40% of Q21 respondents, followed by better proof of results or ROI at 39% and better technology or innovation at 38%. Better reputation or trust and better customer service or support each stand at 35%. These are the same themes that drive attraction, which means acquisition messaging and retention messaging should not be treated as separate worlds.

The risk is active even when the current relationship is not failing. Fifty-nine percent say their organization is somewhat or extremely likely to review or reconsider at least one current B2B partner in the next 12 months. Fifty-four percent have re-evaluated or considered replacing a partner despite being generally satisfied with performance. Buyers do not need to be angry to reconsider; they need a reason to believe another option may be easier to defend.

Relationship Enders

When B2B relationships end, the top reasons are still grounded in fundamentals. Poor performance is the most common relationship ender, selected by 58% of respondents, followed by failure to deliver on promises at 48%. Lack of trust follows at 39% and service decline at 34%. These are not minor service complaints; they are breaches in the evidence buyers need to keep defending a partner internally.



The second layer of risk is more strategic. Budget pressure is selected by 27%, strategic misalignment by 24%, lack of innovation by 21%, and a better alternative emerging by 19%. Those numbers matter because they show that a relationship can become vulnerable even without a dramatic service failure. If the market shifts, priorities change, or a competitor frames a clearer path forward, the incumbent can start to feel less secure.

Looking ahead, performance concerns remain the leading reason organizations would consider removing a current partner in the next 12 months. Cost pressure, poor service or responsiveness, the need for new capabilities, and the need for innovation all follow. The story is not that buyers are constantly looking to churn. It is that the reasons to leave accumulate when performance, value, service, and future-readiness stop feeling current.

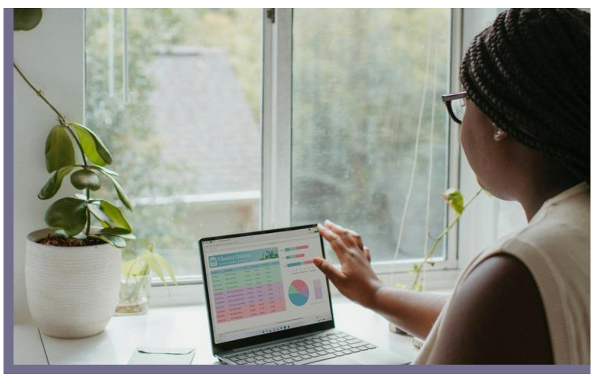
The advocacy gap: satisfaction doesn't automatically create referrals.

The research shows a real advocacy opportunity, but also a real conversion gap. Seventy-five percent of respondents are somewhat or extremely likely to recommend a current B2B partner to a peer or colleague at another company. Yet only 50% say satisfaction often or almost always turns into an actual referral or recommendation. Satisfaction creates permission to recommend, but it does not automatically create the moment, language, or confidence to do it.

The biggest barrier may be the most revealing: 41% say results can be good, but not exceptional enough to recommend. Other barriers are more situational: no one asks for a referral (26%), internal policies limit referrals (22%), reputational risk (22%), the partner is too niche for most peers (20%), and respondents simply do not think about it (16%). Advocacy therefore needs activation, not just satisfaction.

The conditions for a referral are concrete. Good value for cost leads at 51%, followed by consistent results over time at 40%, clear ROI or business impact at 33%, and strong personal service or support at 31%. Innovation, positive coworker experience, low risk, easy implementation, and differentiation also matter. For brands, the path to advocacy is to turn satisfied customers into confident narrators of the value they have experienced.

Budget Pressure Raises the Burden of Proof



Budget pressure does not make buyers abandon value; it makes them interrogate it more sharply. When budgets tighten, lower cost becomes more important to 52% of respondents, but stronger ROI proof follows close behind at 44%. Trust matters more to 39%, better service or support to 35%, and strength of relationship to 30%. The takeaway is not that price wins alone. It is that buyers need a clearer argument for why the spend should remain protected.

The spending outlook also complicates the idea of a frozen market. Fifty-six percent expect spending on B2B partners and services to increase at least somewhat in the next 12 months, while 37% expect it to stay about the same. Only 8% expect a decrease. The categories expected to grow most are AI tools (42%) and technology or software (40%), followed by marketing or advertising services at 22%, and research or analytics tools and data tools at 21% each.

This creates a selective growth environment. Buyers may have money to spend, but they are more likely to direct it toward partners who can connect cost, outcomes, trust, and future readiness. A brand that cannot explain its economic impact risks being treated as discretionary. A brand that can make the business case visible has a stronger chance of surviving budget scrutiny and winning new consideration.

Implications

The central implication is that B2B brands are competing on continuous justification. Buyers are satisfied, but still open. They rely on networks and search, but increasingly use AI to compare, summarize, and shortlist. They value relationships, but they switch when a better business case appears. That means a brand's job is not only to create awareness; it is to make the next step feel rational, credible, and low-risk.

For acquisition, the data argues for a proof-rich discovery system. Brands need to be visible in the places buyers begin: professional networks, search, peer conversations, LinkedIn or social media, and AI-assisted research. But visibility alone is not enough. The message has to quickly communicate capabilities, reputation, value, innovation, and results in language buyers can use internally.

For retention, the data argues for an ongoing value story. Trust, proven results, relationships, and competitive pricing keep partners in place, but satisfaction alone does not close the door on reconsideration. The strongest brands will treat retention, advocacy, and acquisition as one connected system: prove value clearly, refresh the reasons to stay, and equip satisfied customers to become credible proof for the next buyer.

Methodology

This report draws on a national, proprietary quantitative survey of 189 quality-filtered B2B decision-makers involved in selecting, evaluating, or managing business partners, vendors, and service providers. Respondents represented a range of roles, company sizes, and industries, capturing perspectives from both individual decision-makers and members of group decision-making teams.

The questionnaire explored how buyers discover and research potential partners; the roles of professional networks, search, social media, and AI-assisted tools; the attributes that shape consideration and selection; and the factors influencing satisfaction, retention, referrals, reconsideration, and switching. Findings were analyzed across the full sample. Percentages may not total 100% because of rounding or because respondents could select more than one answer.

The margin of error for the full sample is ±7.13% at a 95% confidence level. The findings should be viewed as directional indicators of B2B buyer attitudes and behaviors rather than precise estimates for every industry or organization.

About Carbon

Carbon helps B2B brands solve common challenges: standing out in a crowded market, earning buyer trust, proving value, improving discoverability, and giving customers stronger reasons to stay. Through our proprietary strategic process, Carbon Theory, we bring strategy, brand, media, technology, and data together into one connected system focused on measurable business growth. From brand positioning and demand generation to content, paid media, digital experiences, and analytics, Carbon aligns the full marketing ecosystem around one goal: making brands easier to find, easier to choose, and harder to replace.