



Role & Influence of the Technology Decision-Maker Survey

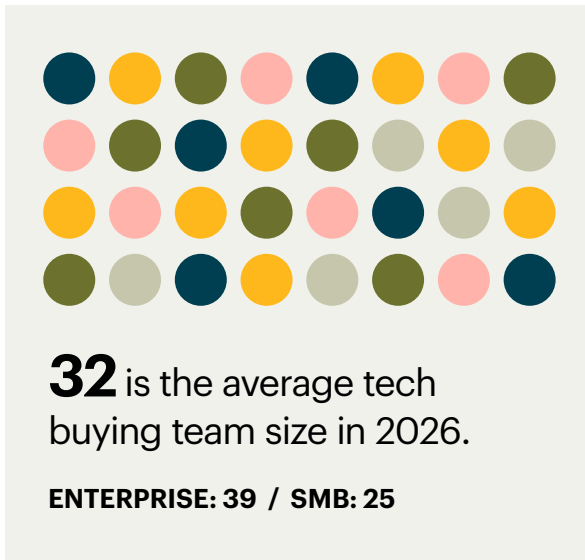
Bigger teams, AI influence, and a more complex path to purchase

Enterprise technology purchasing has become a larger, more distributed and more demanding undertaking. Foundry's 2026 Role & Influence survey found that buying teams are larger than ever, yet individual participants are taking responsibility for fewer stages of the process. The result is a fragmented path to purchase in which evaluators, technical specialists, executive sponsors, and final approvers may all require different information.

Based on responses from 555 technology decision-makers worldwide, this year's report examines how buying teams are changing, where decisions stall and which roles, information sources, and vendor relationships carry the greatest influence. It also documents the rapidly growing role of artificial intelligence. AI-specific positions are joining buying groups, while AI tools are overwhelmingly used to research products,

compare vendors, forecast budgets, and support evaluation. Human judgment remains in control, at least for now.

The findings point to a central challenge for technology providers: Reaching one decision-maker is no longer enough. Success increasingly depends on helping a large network of stakeholders build consensus, navigate risk and



establish a credible business case throughout a purchase process that is becoming more complex, research-intensive and dependent on trust.

A team sport

Buying technology has become a team sport on a scale that would have been difficult to imagine when Foundry began its Role & Influence research more than 15 years ago. The 2026 survey found an average of 32 people involved in influencing enterprise technology purchases, evenly divided between IT and line-of-business participants. That is a striking increase from 21 people in 2019 and 20 in 2022. At companies with 1,000 or more employees, the average buying group size is now 39.

The growing number of voices in purchase decisions helps explain why 72% of IT decision-makers (ITDMs) said the

technology purchase process is becoming increasingly complex, up from 65% in 2024 and 66% in 2025. Complexity isn't suppressing investment, however, as 96% of respondents expect their IT budgets to increase or remain unchanged over the next 12 months, with 53% expecting an increase. That's up from 90% who expected increases in the 2022 study.

More people, smaller scope

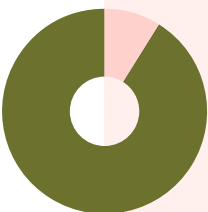
The 2026 data also point to a subtler change. More people are involved, but responsibility appears to be more specialized. Individual respondents report participating in fewer stages of the process than they did four years ago. The CIO remains the most consistent influencer, leading all seven steps of the buying process, while the CEO is most heavily involved in defining needs and approving purchases. Respondents identified the CIO, CEO and CTO as the top three roles driving the purchase process.

CIOs are involved in determining business needs in 40% of organizations, defining technical requirements in 35%, evaluating products in 34%, recommending vendors in 35%, selling internally in 29%, authorizing purchases in 34%, and participating in post-sales engagement in 26%. While the percentages vary from year to year, the CIO's leading role has remained consistent across all studies.

The CEO is the other major bookend influence. Those top executives are involved in determining business needs in 35% of organizations and in authorizing or approving purchases in 32%, but their participation falls to the high teens across most of the technical and evaluation stages. CFOs follow a similar pattern on a smaller scale, with 21% involved in budget approval, but only 11% in vendor selection, and 12% in evaluation.

Technical roles concentrate where expected. IT/networking management, engineers, architects, developers, data scientists, and security specialists are most active in requirements and evaluation. The chief artificial intelligence officer, a role absent from earlier surveys, is involved in determining business needs and technical requirements in 19% of organizations and in evaluation and vendor selection in 15%.

The surge of interest in AI no doubt adds to the complexity equation. Nearly three-quarters of respondents said their organizations are adding AI-specific roles to technology purchase decisions, up sharply from 52% in 2025. At the same time, AI itself



91% of all IT leaders surveyed say AI influences their IT purchase decisions.

74%

of IT decision-makers say that their organization is adding AI specific roles who are increasingly involved in technology purchase decisions.

↑ **UP FROM 52% IN 2025**

has become part of the buying machinery: 93% of all organizations (and 97% of the largest ones) use AI to some degree in the purchase process, and 91% said it has had at least some impact on how technology is bought. That’s up from the 81% who used AI last year. AI is most often used to provide insights on buying decisions, with humans making the final call.

This year’s study gathered input from 555 respondents, with 52% in North America, 19% in Europe/Middle East/Africa (EMEA) and 29% in the Asia/Pacific (APAC) region. The average responding organization has 9,319 employees. Because response cohorts vary from year to year, comparisons with earlier surveys should be viewed as directional rather than absolute. The 2019 study, for example, had 741 respondents, was more heavily weighted toward North America and covered organizations averaging more than 15,000 employees. The questions also change from year to year. Even with those caveats, several long-term shifts are clear.

Buying teams get much bigger

The expansion of the buying group is the most dramatic long-term trend. In 2017, the research found an average of 16 people influencing major enterprise technology purchases. By 2019, the number had risen to 21. Today it's 32.

The increase is visible at both large and small organizations. In 2019, enterprises relied on an average of 28 influencers, while small and mid-sized businesses relied on 13. In 2026, those figures were 39 and 25, respectively. Even a technology purchase at a smaller organization today can involve a committee nearly as large as that of an enterprise seven years ago.

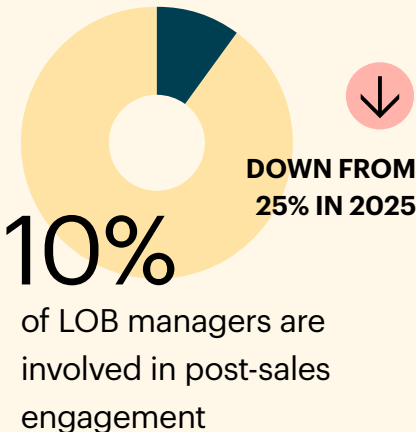
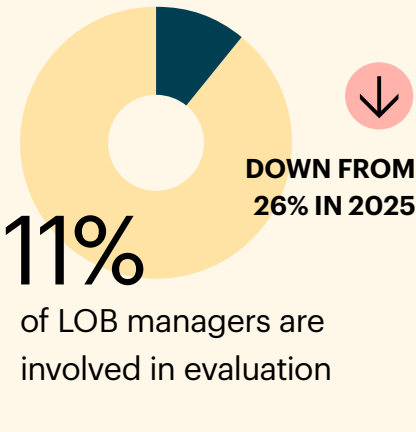
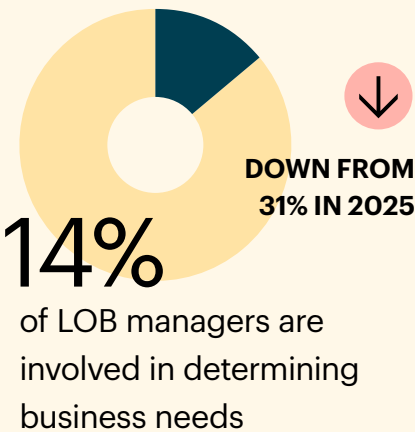
Throughout the years, the ratio of IT to line-of-business influencers has remained roughly equal. Technology

purchases increasingly need to satisfy two constituencies at once: the people responsible for architecture, integration, security, and operations and the people accountable for revenue, productivity, customer experience, and other business outcomes.

The size of the group varies by technology. Cloud computing and IT services have some of the largest teams, ranging from 33 to 37 people, while security and AI each involve about 30.

There was one important wrinkle in the 2026 results about buying involvement. The raw stage-by-stage percentages for many roles are lower than they were in earlier studies. For example, 31% of line-of-business (LOB) managers were involved in defining business need in the 2025 study, but only 14% this year. The percentage of respondents involved in evaluation fell from

A shift in LOB involvement



26% to 11%, and in post-sales engagement from 25% to 10%. IT management, security roles, engineers, and developers showed similar declines in several stages. While the exact numbers fluctuate from study to study, none showed such a large variance in buying involvement as this year.

One possible interpretation of these changes is that organizations are involving more people in the buying group while assigning narrower responsibilities to each function. The shift is toward larger committees and more distributed influence, not universal growth in every role at every stage.

More people, narrower roles

A question about respondents' own involvement in buying decisions reinforces the specialization theory. In 2022, about three-quarters of ITDMs said they were involved in determining business need, defining technical requirements, and evaluating products, while 72% recommended or selected vendors. In 2026, the highest participation rate for any stage was 57% for evaluation, followed by 55% for authorizing purchases, 54% for determining business need, 46% for technical requirements, and 44% for vendor recommendation or selection.

The percentage of respondents involved in post-sales use fell from about 48% in

2022 to 30% in 2026, while participation in the internal selling process dropped from 35% to 21%. Differences in the respondent population may account for some of these variations, but the broad decline across all stages suggests that technology decisions are being broken down into more specialized responsibilities.

Broadening influence patterns indicate there may no longer be one “IT decision-maker” who can carry a product from discovery through approval.

Broadening influence patterns also indicate there may no longer be one “IT decision-maker” who can carry a product from discovery through approval. The evaluator may not be the approver and the executive sponsor may not participate in technical vetting. Vendors must equip different members of the group with different information to support their decisions while maintaining a consistent story.

Changing influence

The rise of AI-specific roles is another new wrinkle. This year, just under three-quarters of ITDMs said their organizations are adding AI-focused roles to purchase decisions. Given that the title of “chief AI officer” is so

new, it's not surprising that involvement is relatively low at this point. Fewer than 20% of respondents reported that AI executives are involved at any stage of the purchase process. However, the influence of this position bears watching in future studies.

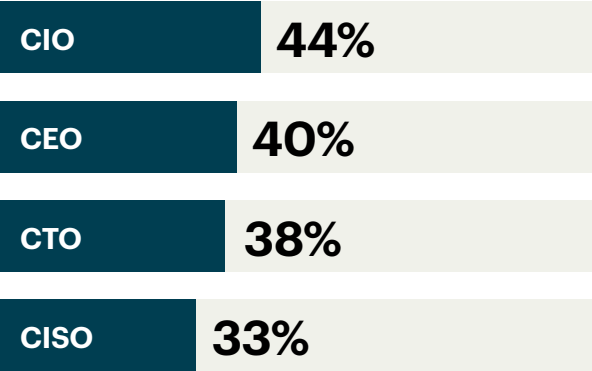
Among respondents who identified roles that are becoming more influential, CIOs led at 44%, followed by CEOs at 40%, CTOs at 38% and chief information security officers at 33%. Chief AI officers, IT staff, chief data officers and software developers were each cited by roughly one-third.

These measures need to be read carefully. The stage-by-stage participation rate for the chief AI officer was actually lower this year than last, despite the sharp increase in AI-specific roles. However, nearly all roles measured in the most recent study saw a decline in influence, indicating that sample variation is a factor. The more significant conclusion is that AI expertise is being woven into buying groups rather than displacing the established authority of CIOs, CEOs and other executives.

Longer paths, more places to stall

The Role & Influence studies have documented steadily lengthening buying cycles over the years. The average process was 4.9 months in 2019, with

Who's become more involved in the purchase process over the past year?



18% of purchases taking less than one month and 15% taking a year or more. By 2022, the average process time had grown to 6.2 months, with only 11% of decisions made in less than a month and 22% taking 12 months or more.

The 2026 questionnaire used different measures, making direct comparisons impossible. However, the category-by-category data show that long buying cycles remain common. For example, 54% of enterprise software/application purchases now take 12 months or more, as do 53% of networking purchases, 52% of telecommunications purchases, 51% of data and analytics purchases and 50% of cloud database purchases. In contrast, 85% of all purchases in 2019 were completed within a year.



49%

of buyers need
vendor help when
evaluating products.

Deals get stuck for a variety of reasons. Purchase decisions most often stall during the evaluation stage (cited by 43%), followed by defining technical requirements (41%), determining business need (36%), and recommending or selecting vendors (35%). These are also the stages where buyers most often need vendor assistance: 49% need help with evaluation, and 40% with technical requirements.

In the future, skills shortages are seen as the leading internal barrier to rapid decisions over the next 12 months (cited by 46%), well ahead of governance and compliance requirements (29%), leadership changes and reorganizations (26% each), and process changes (25%). Externally, government regulation is the largest barrier at 40%, followed by market or economic changes at 31% and competitive threats at 30%.

Other factors are speeding purchases. Just over half of respondents cited increased automation as an internal accelerant,

followed by process changes at 34%. External processes that are picking up the pace include entering new markets (47%) and customer requests (45%). These factors align with findings indicating that the buying process is becoming more complex. Organizations are under pressure to move faster, even as skills gaps, governance challenges, and broader stakeholder groups make consensus harder to reach.

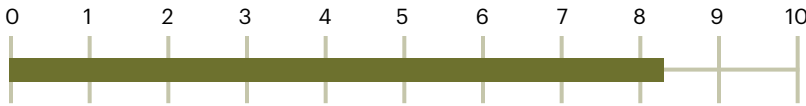
Vendors have an open door, but a higher bar

Although incumbent vendors have a natural advantage in driving new sales, incumbency is not a guarantee of success. Years of research have shown that about half of purchases go to new vendors and the other half to existing providers.

This year's survey asked about openness to considering new suppliers rather than actual switching plans. The results indicate that CIOs remain highly receptive to alternatives; 83% are either very or somewhat open to introducing a new

Top 3 internal purchase barriers

1. Internal skills shortages
2. Governance/compliance requirements
3. Changes in leadership



8.3 is the mean (average) rating for **vendor reputation importance** in the purchase process.

vendor to the broader buying team, and the same percentage are open to meeting or learning about vendors suggested by other members of the committee. Just 4% described themselves as not open to considering new vendors.

89% of ITDMs are more likely to engage with content from trusted brands.

📈 **UP FROM 79% IN 2025**

But openness is just the start. When it comes to purchasing decisions, vendor reputation is critical, receiving an average importance rating of 8.3 on a 10-point scale this year. Eighty-three

percent agree that reputation is one of the top factors they consider in purchase decisions, up from 77% in 2025. That's also up from the 61% who answered a somewhat different question in 2019, indicating that experience with a vendor increases the likelihood of a meeting.

An overwhelming 89% are more likely to consume content from trusted brands, and 79% acknowledge actively working with vendors to help develop the business case

around their technology investments. This continues a trend documented in years of influence research: Vendors who provide trustworthy content are considered valuable allies in informing purchase decisions. Suppliers have a particularly significant role in creating ROI arguments, educating stakeholders and navigating consensus.

Research rises while trusted content endures

The information environment has changed substantially since 2019, but the underlying need for credible information has not. In 2019, technology content sites were cited as the most-used individual source for keeping current by 53% of ITDMs, followed by white papers at 48%. Technology content sites were also first in 2022 at 51%, followed by white papers at 45% and webcasts and webinars at 39%.

Most helpful information sources during the tech purchase process

1. Research
2. Analyst firms
3. Tech content sites
4. Business content sites
5. Peers

When respondents were asked which sources are most helpful in making a purchase decision, research topped the list with analyst firms second and technology content sites third. Business content sites and peers complete the top five. This is a shift from earlier studies, which documented a more pronounced role for technology content sites.

The perceived value of research has been steadily rising in recent surveys, a trend unsurprising given increasing complexity. Research is especially prominent when the purchase process is examined stage by stage. This year, it ranked number one in the first six of seven stages, from determining the business need through authorization. Vendors ranked first in post-sales engagement, although they are among the top five throughout the cycle and become more prominent during evaluation, recommendation and approval. Technology content sites also remain among the top sources at nearly every stage.

That is an evolution from 2019 and 2022, when technology content sites and white papers dominated early stages, and vendor sources became more important later. In fact, analyst firms (the counterpart to research sites in the current study) appeared only once on the list of top information sources used in 2022. It should be noted that white papers were also prominent sources of information

9.1 pieces of content are consumed on average during the purchase process



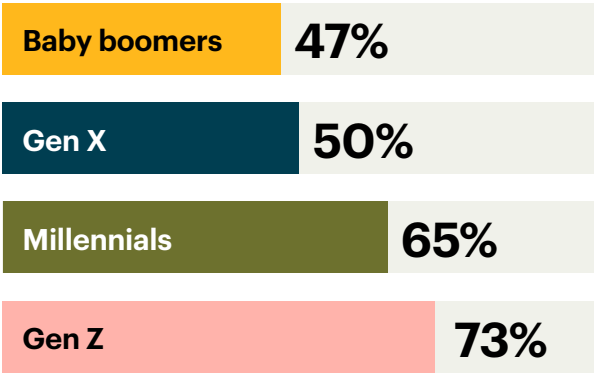
before this year, when a taxonomy change removed them from the list. The bottom line is that buyers favor credible, information-rich sources, while vendors gain influence as implementation approaches.

Buyers are consuming more content

The amount of material buyers rely upon for decision-making has also increased. ITDMs now consume an average of 9.1 pieces of content during the purchase process and download 8.3 pieces of gated content. Only 1% say they download nothing. In contrast, respondents to the 2022 study downloaded an average of six content items and 18% downloaded none. The direction is clear: Buying is becoming more research-intensive, while committees are becoming larger.

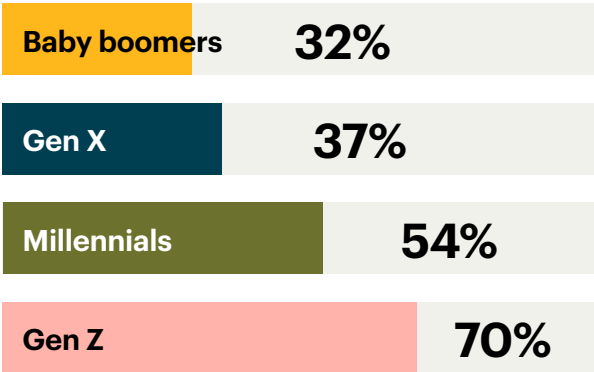
Generational differences are significant on this question. Technology content sites

Research use across generations



are less popular with older buyers than younger ones. Seventy-one percent of millennials and 69% of Gen Z buyers rely on them compared with 59% of Gen X and 53% of baby boomers. Another striking finding is the popularity of research among younger buyers. Gen Z respondents rated it their top information source this year, with 73% saying they consult research during the process. That’s followed by 65% of millennials but just 47% of baby boomers. Less surprising is the use of social

Younger tech buyers turn to social media to engage with vendors



media, which peaks among millennials at 48%, compared to just 13% of boomers.

Older decision-makers tend to rely on tried-and-true platforms, favoring events (38% among boomers versus 25% for Gen Z) and peer recommendations (38% versus 29%).

Yet younger buyers aren’t completely avoiding direct vendor contact: 70% of Gen Z respondents engage vendors through social or business networking sites, 83% attend virtual meetings and 74% meet vendors in person. That’s more than boomers, 32% of whom engage through social media and 55% attend virtual meetings. The area of greatest commonality is in-person vendor meetings, which about three-quarters of respondents across all age groups attend. The emerging model is digital-first, but not digital-only.

AI is now embedded in the buying machinery

No development more clearly separated the 2026 study from its predecessors than AI. An overwhelming 93% of respondents this year said their organizations use AI in some capacity during the IT purchase process. The adoption rate is even higher at 97% in organizations with 1,000 or more employees.

Buyers aren’t delegating decisions to a machine. A majority 60% said they use

Top AI tools ITDMs are using:

1. Generative AI
2. AI-powered market research
3. AI-based contract analysis

AI-driven insights but keep decision-making human-led. Another 19% rely heavily on AI for product research and recommendations, and 14% use it only for specific tasks such as vendor comparisons.

Generative AI is the preferred tool, cited by 49% of respondents. That was closely followed by AI-powered market research (45%), AI-based contract analysis (42%), vendor comparison platforms (41%) and predictive analytics (39%). The takeaway is that these tools are being used to compress work that once required manual searching, document review, and comparison.

The biggest AI impacts so far are in research and evaluation, where 43% said AI makes it easier to forecast budgets—the same percentage use AI-generated solution recommendations. A nearly equal 41% said it accelerates vendor evaluation and vetting.

Segmented by the stage in the buying process, 55% said evaluation is influenced by AI, followed by 44% who use it to define technical requirements, and 39% who apply AI to the vendor selection

process. The least popular application of AI is in post-sales engagement at 16%.

This pattern reinforces the broader findings of the survey. AI can accelerate information gathering, comparison and analysis, but the hardest parts of the technology buying process are increasingly organizational. Building consensus across dozens of stakeholders, resolving governance concerns, securing approval, and making the business case are tasks that machines have yet to master.

Conclusions

The Role & Influence research has documented steady growth in the size of buying committees and influence of non-IT stakeholders for the past decade. This year's study puts an exclamation point on those findings.

The average buying group has grown from roughly 20 people in 2019 to 32 today, with IT and line-of-business participation numerically balanced. CIOs remain the most consistent leaders, but CEOs and CFOs are exerting more influence than ever, particularly at the beginning and end of the process.

At the same time, responsibility is becoming more fragmented. Buying cycles remain long, with the process most likely to stall in the early and middle

stages. Skills shortages and governance demands add friction. The challenge is less about finding a single decision-maker than enabling a network of specialists and executives to reach agreement.

Trust also remains a durable constant. Technology content sites, research, analyst firms, peers, and vendors all play different roles, but the consistent message across years of studies is that buyers reward credibility. They are consuming more content than ever and prefer to engage with brands they already trust, yet they also show a striking openness to new sources. Challengers can seize this opportunity

by quickly establishing credibility through trusted, high-quality content.

AI is now altering both sides of the equation. AI-specific roles are joining buying groups while AI tools are helping those groups research products, forecast budgets, compare vendors, and evaluate options. For now, AI is augmenting rather than replacing human judgment. Whether it can replace the social aspects of decision-making over time will be a trend to watch in future surveys. In the meantime, the buying process is becoming more distributed and consensus-dependent than ever.

About the survey

Foundry's 2026 Role and Influence of the Technology Decision-Maker survey was conducted online among the audiences of Foundry's B2B brands (CIO, Computerworld, CSO, InfoWorld, and Network World) representing IT decision-makers involved in the technology purchase process for their organization. Results in this survey are based on 555 respondents, all involved in the purchase process for major IT or security products and services, to the 30-question survey across multiple industries and countries.

Go deeper into the data

There's more to the story. Explore how technology purchase behavior differs by generation, geography, and company size.

Looking for insights specific to your audience? Connect with a Foundry sales representative to learn more about the deeper cuts available from our research.

Generation gaps

The younger the buyer, the more content they consume. Millennial and Gen Z buyers consume 9.5 and 8.8 content items, respectively, when researching technology purchases compared to 7.1 for baby boomers.

The youngest buyers do their research. Preference for analyst firms and published research was notably higher among Gen Z buyers in this year's survey than those born before 1980.

Buying teams become larger as respondents' age falls. Some 80% of the pre-1964 group say fewer than 10 people influence technology purchases, compared with 32% of the youngest respondents.

Younger respondents use AI more. Reliance on AI for product research and recommendations increases from 9% among boomers to 38% among Gen Z.

Use of social and business networking channels varies strongly by age. Just under 32% of boomers engage with vendors on social sites, compared with 70% of Gen Z.

Younger respondents are more likely to perceive competitive threats as affecting their purchases. That's considered a barrier by 20% of the oldest group, rising to 32% among millennials and 42% among Gen Z.

38%

of Gen Z relies on AI for product research and recommendations.

Younger respondents generally work in larger organizations.

Only 27% of boomers work for organizations with more than 500 employees, compared with 63% of Gen X and 74% of millennials.

Location matters

North American respondents participate more broadly in the buying process. Some 64% of North American respondents help determine the business need, compared with 51% in EMEA and 39% in APAC. North American ITDMs are also more likely to evaluate products, recommend or select vendors, authorize purchases and participate in post-sales engagement.

APAC respondents rely more heavily on vendors as information sources. Vendors are considered a top helpful source by

46% in APAC and 36% in North America, but only 18% in EMEA.

Technology buying cycles are consistently longer in APAC. APAC respondents report buying cycles longer than 12 months for enterprise applications,

servers/storage, security, laptops, management tools, telecommunications, and collaboration software, compared with their peers in other geographies.

EMEA respondents are more concentrated in midsized organizations. Some 69% work in organizations with fewer than 1,000 employees, compared with 48% in North America and 45% in APAC.

Vendor reputation matters most in North America. It received a “high importance” rating from 60% of North American respondents, compared with 47% in EMEA and 38% in APAC.

APAC reports faster expansion of digital and AI leadership roles. Over 42% in APAC said the chief digital officer has recently become involved in technology purchasing, compared with 26% in North America and 16% in EMEA.

North American CIOs are more likely to be described as “very open” to new vendors. Nearly 46% of North American respondents said their CIO regularly introduces new vendors to the buying team, versus 31% in EMEA and 29% in APAC.

60%

of North American respondents rated **vendor reputation** as being of high importance.

Big companies, big committees

Large organizations have substantially bigger buying committees. Only 7% of large organizations (more than 1,000 employees) have fewer than five people influencing technology purchases, compared with 22% of smaller organizations.

Respondents in large enterprises participate in more stages of the purchasing process. Nearly 63% of respondents from large organizations

authorize or approve purchases compared with 48% from smaller ones.

Analyst firms are far more influential in large organizations. They're used by

48% of large enterprises compared with 30% of smaller organizations.

Enterprises lean more heavily on vendors as information sources.

Vendors help respondents perform their roles at 54% of large organizations, but only at 39% of smaller companies.

AI has a broader impact in big firms. They are more likely to use AI to accelerate vendor evaluation by 47% to 34%, automate RFP creation by 38% to 24%, and improve post-purchase performance and ROI measurement by 45% versus 32%.

Senior technology executives play a wider role in large-enterprise purchasing.

The CTO helps determine business needs in 25% of large organizations, compared with 11% of smaller ones.

47%

of big firms are more likely to use AI to accelerate vendor evaluation

Examining the marketplace

Research is an invaluable way for marketers to better understand customers and prospects, with the goal of building quality connections. At Foundry this is one way we are focused on building bridges between tech buyers and sellers. Our first-party relationships with the most important tech buyers and influencers around the world, allows us to apply value across our customers marketing stack. Our research portfolio explores our audiences' perspectives and challenges around specific technologies—from analytics and cloud, to IoT and security—and examines the changing roles within the IT purchase process, arming tech marketers with the information they need to identify opportunities.

To see what research is available, visit foundryco.com/tools-for-marketers.

For a presentation of full results from any of these studies, contact your Foundry sales executive or go to foundryco.com/contact-us.

Buying process

Each year we take a deep dive into the enterprise IT purchase process to learn more about who is involved and who influences decision-making, what sources purchasers rely on to keep up to date with technology—and throughout the purchase process—and how they want to engage with the vendors they are working with. Visit foundryco.com/customerjourney for more information.

Buying process studies

- Customer Engagement
- Role and Influence of the Technology Decision-Maker

Technology insights

Each year we explore the technologies that are top of mind among our audiences to understand the business challenges, drivers, and adoption within the enterprise. These research studies are designed to help IT marketers understand what their customers are focused on and where the market is moving.

Role and priority studies

- CIO Tech Poll: Tech Priorities
- State of the CIO

Technology-specific studies

- AI Priorities
- Cloud Computing
- Security Priorities
- Partner Marketing

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About Foundry

Foundry's vision is to make the world a better place by enabling the right use of technology, because we believe that the right use of technology can be a powerful force for good.

Foundry is a trusted and dependable editorial voice, creating quality content to generate knowledge, engagement and deep relationships with our community of the most influential technology and security decision-makers. Our premium media brands, including CIO®, Computerworld®, CSO®, InfoWorld®, Macworld®, Network World®, PCWorld® and Tech Hive®, engage a quality audience of the most powerful technology buyers with essential guidance on the evolving technology landscape.

Our trusted brands inform our global data intelligence platform to identify and activate purchasing intent, powering our clients' success. Our marketing services create custom content with marketing impact across video, mobile, social and digital. We simplify complex campaigns that fulfill marketers' global ambitions seamlessly, with consistency that delivers quality results and wins awards. Additional information about Foundry is available at foundryco.com.