The AI Inflection Point

How technology companies compete, grow, and decide in an AI-driven market

46%

of enterprise technology buyers now use AI as their most frequently used source during vendor evaluation, ahead of the vendor salesperson at 33%.

Source: IDC Survey: The AI Front Door, Earned Trust, and Diversified Buying Committees — The New Rules of B2B Tech Buying in 2026

The report was produced using IDC Quanta

Every finding was surfaced using IDC Quanta and cites a specific IDC source, version, and date, backed by 60+ years of trusted tech intelligence.

THE PROBLEM

AI has changed the rules. Most technology companies are still playing by the old ones.

AI has restructured the enterprise technology market across every function technology companies compete on. Buyers evaluate vendors differently. Sales cycles have changed shape. Strategic decisions are being made with AI-generated intelligence that may not hold up to scrutiny. The market intelligence infrastructure most companies run, manual research cycles, portal-based sourcing, unsourced competitive claims, was not built for this environment.

The companies pulling ahead are not running larger teams or holding more subscriptions. They have restructured how intelligence reaches the people who need it, how it is sourced and defended, and how fast it moves from market signal to action. IDC data documents the gap between those companies and the rest, and it is widening.

COMPETE

AI has changed how buyers find, evaluate, and shortlist technology vendors. The competitive intelligence and positioning workflows most technology companies run have not changed to match.

The result: vendor claims are being evaluated by buyers who are better informed, more skeptical of AI generated content, and increasingly using independent analyst data as the credibility benchmark.

GROW

The technology sales cycle has been restructured. Buyers enter conversations later, more informed, and with AI-generated shortlists already in hand.

Sales teams that have not adapted their enablement, content, and intelligence infrastructure to this new entry point are competing at a structural disadvantage on every deal.

DECIDE

Strategic decisions at technology companies, product investment, market entry, pricing, planning, are increasingly being made with AI-generated intelligence. But most of that intelligence lacks the independent sourcing, traceability, and governance that boards, CFOs, and enterprise buyers now require.

The confidence gap between AI adoption and AI trust is the defining risk in the C-suite right now.

[Your buyers have already changed. See where your GTM stands.](#) →

Finding 1: The buyer has already moved

The buying journey has been restructured around AI. Most go-to-market strategies have not.

Buyers are using AI for vendor evaluation today:

- **68%** use AI always or often to compare products and solution features across vendors.
- **70%** use AI always or often to research industry and technology trends.
- **62%** use AI always or often to gain advice on how to solve a business problem.
- **54%** use AI always or often as an intermediary for RFI/RFP and configuration tasks.
- **68%** use AI always or often to gain deeper technical understanding of how products/services work.

Source: IDC Survey: The AI Front Door, Earned Trust, and Diversified Buying Committees — The New Rules of B2B Tech Buying in 2026

Future intent:

- **86%** will use AI to streamline and speed internal buying decisions.
- **80%** will use AI agents to proactively engage and reduce salesperson reliance.
- **74%** will delegate buying tasks to AI agents under set parameters

Source: IDC Survey: The AI Front Door, Earned Trust, and Diversified Buying Committees — The New Rules of B2B Tech Buying in 2026

By 2028, **70%** of enterprise application buyers will use AI agents for pricing and contracting.

By 2029, **42%** of B2B buying journeys will be executed by AI agents autonomously.

This is not a trend to monitor. It is a deadline.

Sources: IDC FutureScape: Worldwide AI-Enabled Enterprise Applications and Agents 2026 Predictions; IDC FutureScape: Worldwide Agentic Experience Orchestration 2026 Predictions

ASK IDC QUANTA

"According to IDC, how is AI changing the way enterprise technology buyers evaluate and select vendors?"

"What percentage of buyers are currently using AI tools during the evaluation stage, and at which stages is AI most influential?"

Ask your market question →

AI adoption in buying journey by segment:

- **Large Enterprise:** AI for productivity and process speed; more conservative on autonomy and human replacement.
- **Midmarket:** Furthest ahead. AI-led exploration, evaluation, and RFI/RFP consolidation.
- **Small Business:** Lean into AI-assisted vendor comparisons and information synthesis.

Source: IDC Survey Spotlight: How Does the Use of AI Vary Across Buyer Segments, 2026

Finding 2: The credibility gap

AI has raised the sourcing standard precisely when it's easiest to cut corners.

Where credibility risk is rising

AI Content Fatigue: IDC's 2026 Marketing Barometer documents rising buyer fatigue with AI content and falling trust in vendor material. Buyers are applying more scrutiny, not less.

Sourcing Scrutiny: Industry experts and analysts (45%) are now statistically tied with AI tools (46%) as the top evaluation source, while vendor websites have fallen from 66% to 37%.

Governance Checkpoints: Legal, procurement, and technical evaluators now apply formal AI governance checks that stall unsupported claims. Undisclosed AI-generated claims create review triggers that slow or derail deals.

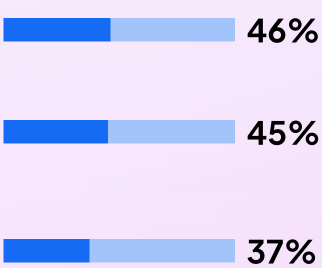
90%

of enterprise legal buyers are writing AI clauses into guidelines, creating formal triggers to challenge unsupported vendor claims.

Source: IDC Survey: Generative and Agentic AI in Legal, 2026

Buyers are more skeptical of vendor AI content precisely because there's more of it. Analyst and third-party sources outrank vendor salespeople, and structured, independently sourced content is what AI discovery tools surface.

How buyers rank information sources during evaluation:



AI tools like ChatGPT/Gemini: Now ahead of the vendor salesperson (33%) as an active evaluation source.

Industry experts and analysts: Highest credibility. Analyst reviews cited by 33% as most helpful for final decisions.

Vendor websites: Most accessed, least trusted. Buyers treat vendor-published content as marketing.

Source: IDC Survey: The AI Front Door, Earned Trust, and Diversified Buying Committees — The New Rules of B2B Tech Buying in 2026

ASK IDC QUANTA

“What does IDC research identify as the biggest risks for technology companies that rely on public AI tools rather than proprietary research-grounded platforms for competitive intelligence?”

“Are there findings on sourcing failures, credibility gaps, or analyst scrutiny of AI-generated claims?”

Every IDC Quanta answer is sourced, cited, and defensible. See it in action. →

Finding 3: The maturity gap

AI adoption is accelerating. AI maturity is not keeping pace.

AI maturity across GTM functions:

Strategic Decision-Making
Early-stage across most enterprises, with a small advanced cohort. Governance and senior-leader oversight of AI outputs remain prerequisites to scale.

Sales Enablement
Furthest into production among early adopters. Over half report live use across lead scoring, proposal generation, and coaching, though scale is constrained and human approval remains the norm.

Marketing and GTM
Early-stage overall, with the widest gaps in data readiness, governance, and change management. Competitive and market intelligence sit inside this GTM cohort.

Sources:IDC MaturityScape Benchmark: AI-Fueled Organization Worldwide, 2026 (US54374726); IDC MaturityScape: AI-Fueled Organization 2.0; IDC Survey: Early Adopters of Agentic AI Use Cases Within the Sales Function, 2026; IDC's 2025 AI Marketing Benchmark: Architecting Marketing for AI

3.1%

of organizations have reached the Optimized AI maturity stage, up from 0.4% a year ago.

The worldwide picture masks a regional split: North America's Optimized-stage share (4.9%) is roughly 2x the worldwide average, while EMEA (2.4%) and APAC (2.5%) trail close together, both are still under the worldwide 3.1% mark.

Source: IDC MaturityScape Benchmark: AI-Fueled Organization Worldwide, 2026

The maturity gap isn't just persisting, it's widening. A small leading cohort is pulling further ahead, with the Optimized stage growing roughly 8x year-over-year, while the broad middle of the market has barely moved. Sales enablement shows the most production adoption today, in lead scoring, proposal generation, and coaching, while strategy and marketing/GTM remain earlier. Governance and data readiness lag tool adoption across all three, and it is the organizations that closed that gap, not those that bought the most tools, that are pulling ahead of everyone else.

ASK IDC QUANTA

“What does IDC research show about the maturity of AI adoption across strategic decision-making, sales enablement, and marketing functions?

“Where is adoption furthest into production, and what are the common constraints?"

ASK IDC QUANTA

What a real answer looks like:

QUERY

“What is IDC's current market size and vendor share data for the worldwide core AI software market, and which vendors have gained or lost share over the past 12 months?”

Worldwide core AI software market:

$42.8B

Market size 2025H2, up 103% year-over-year vs. $21.0B in 2024H2

$29.4B

Market size 2025H1, up 71.9% year-over-year.

Source: IDC Worldwide Semiannual Core AI Software Tracker, Final Historical dataset, 2025H2.

Vendor share: 2025H2 (Top 5) vs. 12 months prior:

Vendor	Share 2025H2	12 Months Prior	Movement
[redacted]	20.1%	9.0%	Moved from #2 to #1
[redacted]	16.2%	16.6%	Moved from #1 to #2
[redacted]	9.2%	8.0%	Holds #3
[redacted]	6.9%	1.6%	Entered the top five
[redacted]	4.2%	5.6%	Remains top five
“Others”	37.8%	52.0%	Compressed sharply. The market is concentrating rapidly.

Source: IDC Worldwide Semiannual Core AI Software Tracker, Final Historical dataset, 2025H2

This is one IDC Quanta answer: sourced, cited, and board-ready. Now, try yours.
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IDC Quanta is built for exactly the market and competitive intelligence questions your team faces every day about AI market share, buyer behavior, competitive positioning, and strategic planning.

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"The ability to ask a question and get an insight that's backed by specific, referencable research is really the key to the tool."

Eric Walk
VP, AI & Data Platform Services, Perficient

"As soon as I used it, I knew it. I said, I know what this is. I know how to use it. I know how to make it do work for me. Confidence comes from trust of the vendor. I trust IDC to give me good information."

Mark Terranova
Global Head of Analyst Relations, Kyndryl

ASK IDC QUANTA

IDC Quanta is the technology intelligence fabric of the AI-enabled enterprise. It brings the structured, sourced, and defensible intelligence IDC has produced for more than 60 years directly into the tools and workflows where your teams already work — delivered automatically, traceable to source, and embedded without requiring a separate portal or login.