



Mapping SMB Buying in the Marketplace Era



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Shifting SMB Purchasing Trends

Sales strategists and marketing professionals frequently focus on feeding the sales funnel and engaging buyers at each stage of the buyer's journey — the process through which B2B customers recognize needs, research solutions, evaluate suppliers, and ultimately acquire and deploy products and services.

Before the Internet, sellers controlled this process. Salespeople held all the product information. Pricing and margins were opaque. Buyers had little choice but to engage multiple salespeople and professional experts to identify and evaluate available solutions.

The Internet changed that by making information abundant and accessible. For the past two decades, the B2B buyer's journey typically has begun with a search engine, where buyers gather information, research supplier capabilities and value propositions, and engage with other buyers to learn from their experiences. Social media has further contributed to this process, providing access to expert opinions and influencer insights into products and services.

Over the past decade, marketplaces and e-commerce platforms have become increasingly important channels for buyers at small and midsize businesses (SMBs). These companies seek self-service procurement options to research solutions, evaluate pricing, and conduct frictionless transactions. According to McKinsey & Company, more than 50% of SMBs now purchase through marketplaces and e-commerce outlets.¹ A Boston Consulting Group study reports that more than 50% of SMBs plan to increase their use of self-service buying mechanisms.²

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1. McKinsey & Company, "Winning the SMB Tech Market in a Challenging Economy," February 2023, <https://www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/winning-the-smb-tech-market-in-a-challenging-economy>.
 2. Boston Consulting Group, "How B2B Marketplaces Are Rewriting the Rules of Trade," June 2024, <https://www.bcg.com/publications/2024/how-b2b-marketplaces-are-rewriting-rules-of-trade>.



The rise of marketplaces and e-commerce doesn't diminish the role of traditional technology resellers and managed service providers (MSPs) that support SMBs. If anything, these self-service platforms create opportunities for solution providers to engage customers where they're researching and purchasing, offer flexible buying options, and open new avenues for managed and professional services.

While marketplaces and e-commerce platforms streamline transactions, buyers still face technology complexity, integration hurdles, and post-sales support requirements. SMBs may quickly encounter the limits of self-directed buying when selecting solutions that require configuration, customization, or multi-vendor integration. In these instances, trusted partners remain critical in guiding purchasing decisions, ensuring deployment success, and providing ongoing operational support.

For MSPs and solution providers, understanding the pathways, motivations, and proclivities of SMB buyers in the age of marketplaces and digital sales is paramount. By gaining insight into the new buyer's journey, MSPs and solution providers can develop models that deliver the right sales channels to buyers and establish effective intercept points for services that meet customers on their terms.

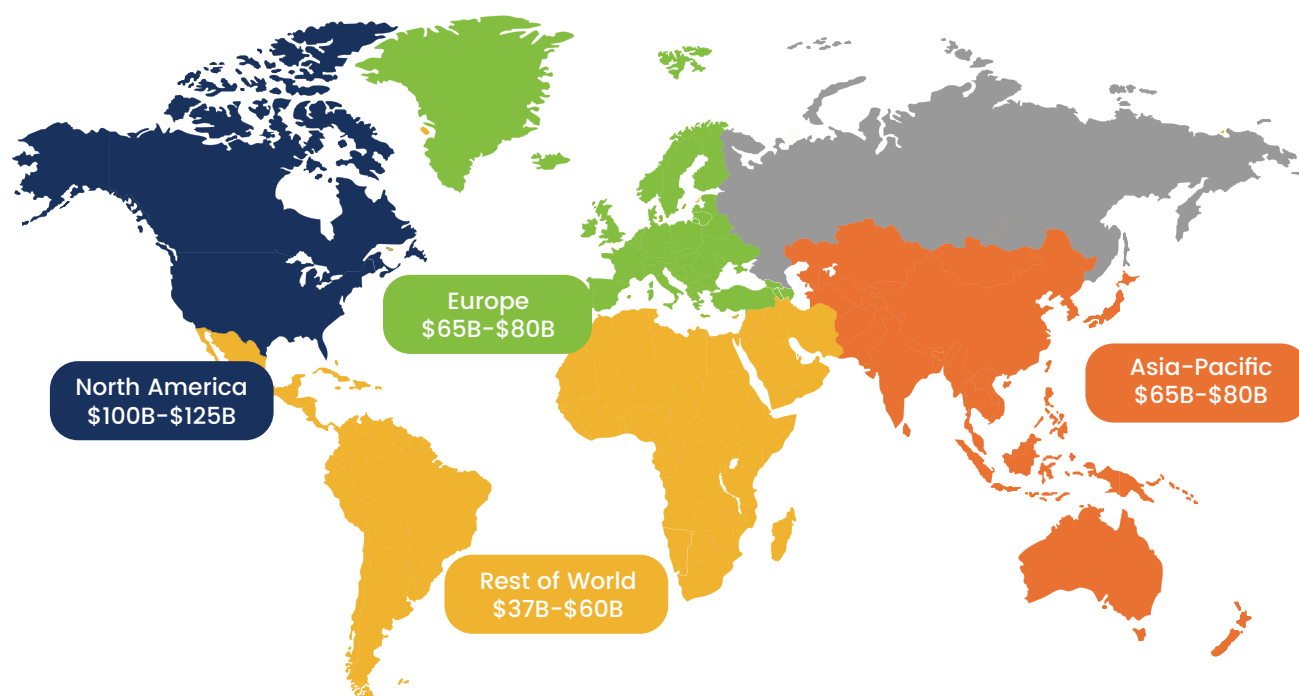
In this report, Channelnomics and Pax8 provide insights into how SMB buyers engage with various sales models, what they encounter at the start of their journeys, and how MSPs can leverage these approaches to capture sales and service opportunities, regardless of how SMBs choose to purchase.



Sizing the SMB IT Market Opportunity

The total global IT market exceeds \$5 trillion annually, with the SMB segment representing a significant share of that opportunity. While estimates vary, the general consensus is that SMBs collectively spend between \$267 billion and \$350 billion each year on IT products, services, and professional support. Globally, SMBs invest about \$75 billion in software, spanning both on-premises solutions and cloud-based services. This software spending generates additional demand for managed and support services, which account for an additional \$200 billion to \$250 billion in revenue, largely delivered by MSPs and other intermediary providers.

SMB IT Spending by Region



Source: Various Market & Analyst Reports

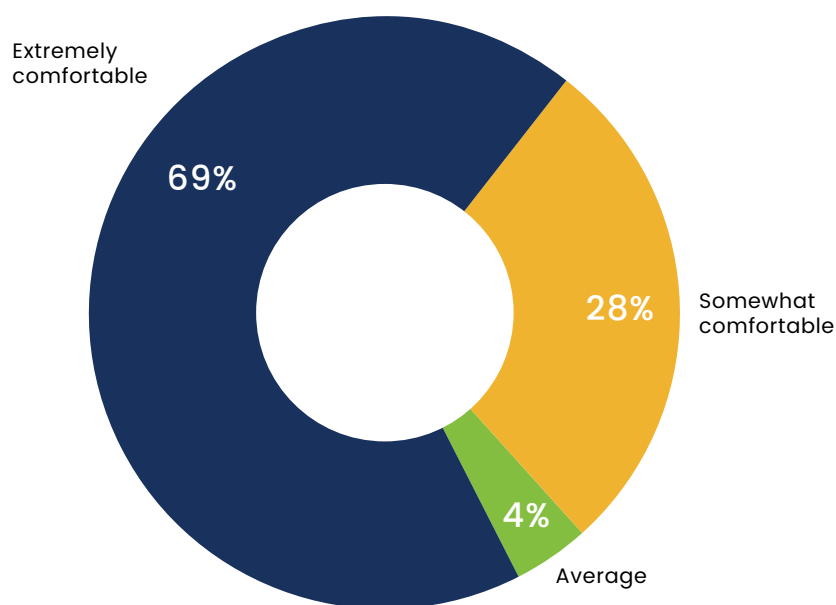
These are estimates, but they indicate that SMBs account for as much as 10% of total global IT spending. For MSPs and solution providers focused on the SMB segment, this represents a sizable and growing opportunity. As SMBs continue their investments in software, cloud services, infrastructure, and security, and increasingly invest in artificial intelligence capabilities, the demand for specialized expertise, implementation services, and ongoing support will grow. Providers that can integrate AI into their offerings, align with SMB buying behaviors, and deliver flexible, scalable solutions will be well-positioned to capture a meaningful share of this market.

Profiling SMB Buyers

We typically think of SMBs as being resource-constrained and lacking IT expertise. While it's true that many SMBs — companies with under 500 employees — don't have the lavish resources and budgets of large enterprises, they're not devoid of IT know-how and capabilities.

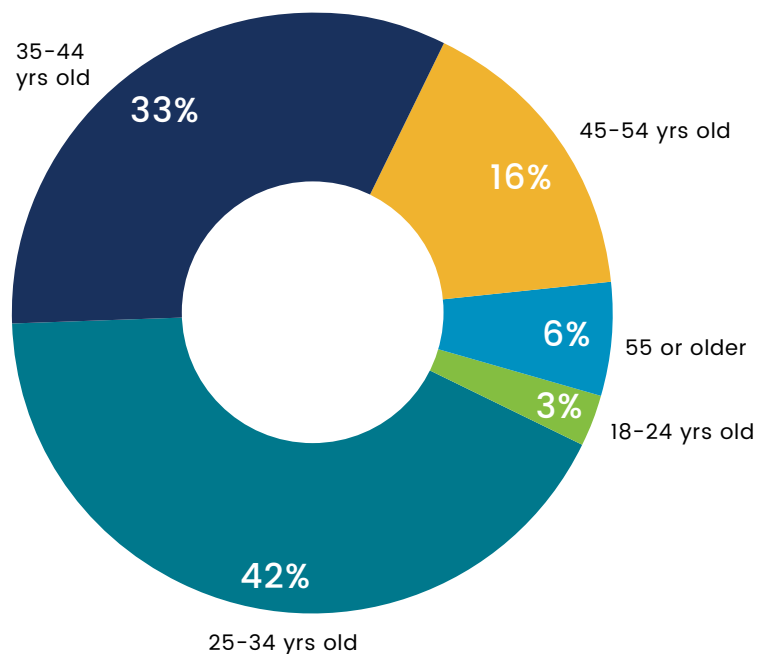
In our research sample, more than three-quarters of the participants are the primary decision-makers when it comes to purchasing IT products and services. These people take a hands-on approach to researching, evaluating, buying, and deploying technologies from respective channels. Moreover, they are, by and large, confident in their knowledge and ability to understand the technologies they're seeking and using.

SMB Buyers' Technology Knowledge Level



It's not just that they're confident; they're also predominantly younger. SMBs are employing a new generation of IT managers and staff. The average IT manager today is a millennial or Gen Z professional who entered the workforce as a digital native. They bring different expectations for how technology should function for both the business and its employees. They default to self-guided online research and expect frictionless purchasing experiences through digital sales outlets. This behavior is a byproduct of the "Amazon Effect," with younger buyers expecting seamless processes and immediate fulfillment.

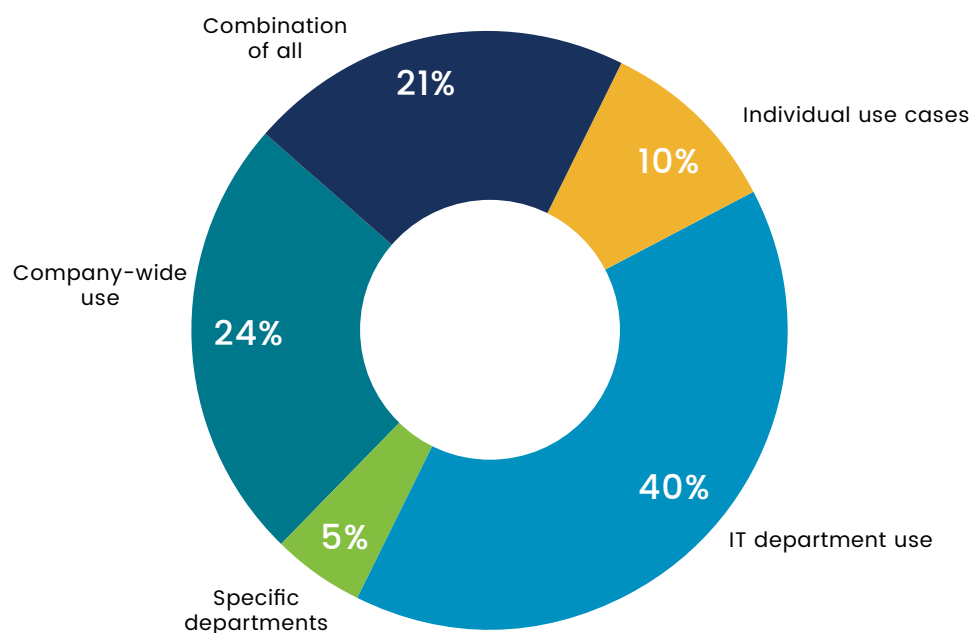
Ages of SMB IT Decision-Makers



These SMB IT buyers aren't acting in isolation or for singular purposes. They're often responsible for decision-making and procurement across multiple departments or for the entire organization. When they seek IT products and services, they do so to benefit both the business as a whole and the individual employee experience. This broad level of responsibility shapes their expectations throughout the purchasing journey.



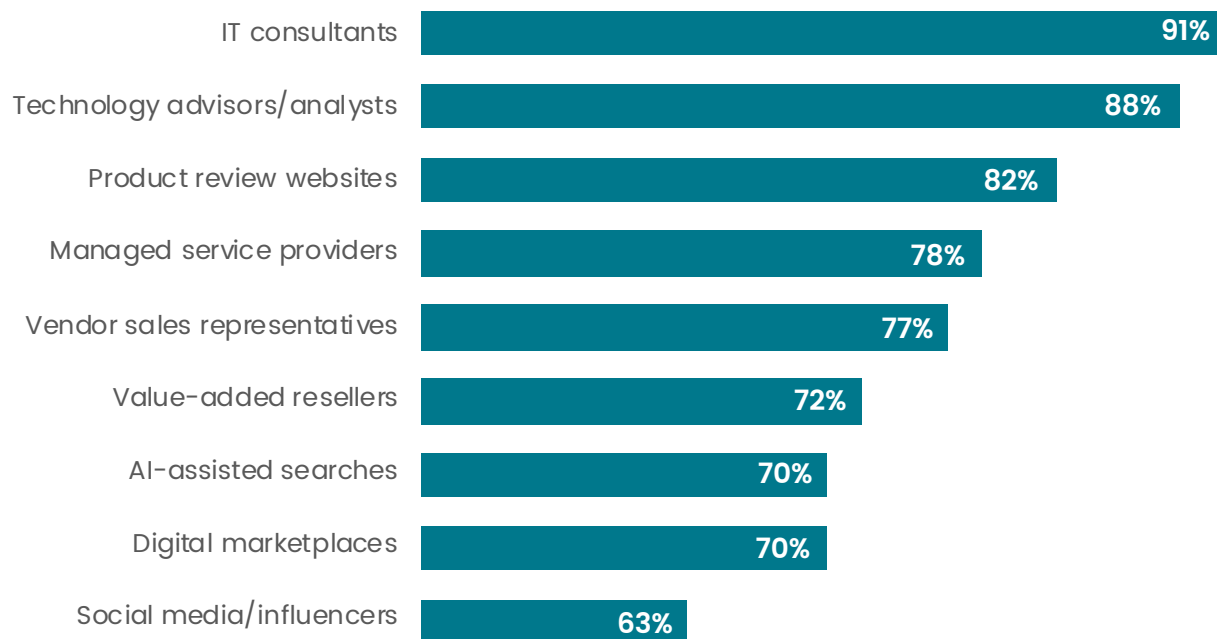
SMB IT Buyers' Scope of Responsibility



Another noteworthy trend is a generational divide among buyers. While older buyers tend to engage in traditional, human-led sales processes, younger buyers tend to default to online resources and marketplace sales. Overall, though, these SMB buyers tend to trust the experience and expertise of IT professionals as much as they do online resources.



SMB Buyers' Trust in Technology Information Sources



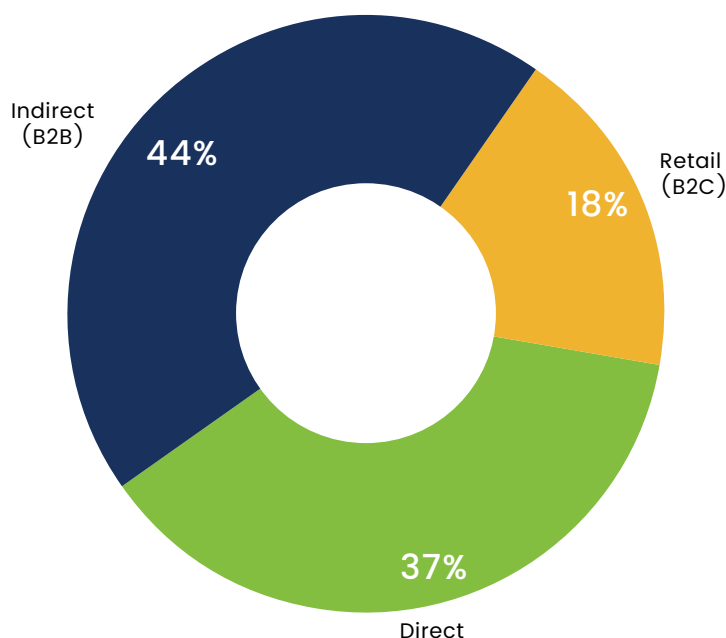
The assortment of trusted information sources doesn't suggest that SMBs are conflicted about where they seek guidance. Rather, it reflects the array of buying contexts. Varying levels of technology complexity and knowledge gaps lead SMBs to seek expert advice even after they've begun self-guided research and purchasing. SMB buyers also turn to multiple sources of information and validation to ensure that they're making sound decisions.

The profile of surveyed SMB buyers indicates that MSPs and solution providers must expand their engagement beyond traditional direct communications. They need to influence buyers through vendors, analysts, social media, influencers, and other trusted sources. MSPs must provide information and maintain a presence wherever customers are seeking insights into products and services.

SMB Buying Preferences

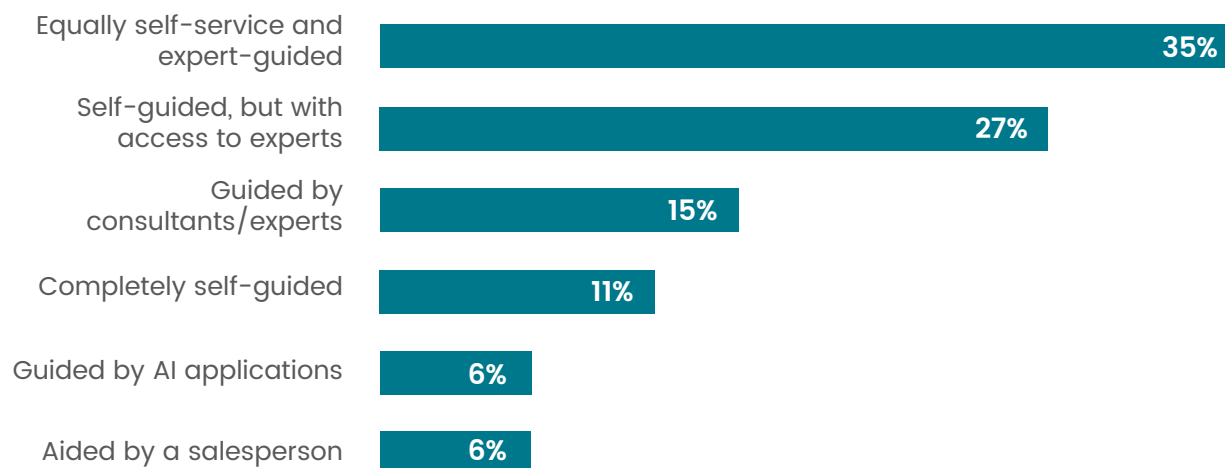
SMB buyers have a mix of preferences for sourcing products and services. While more than one-third prefer to buy direct from a vendor through a salesperson or digital sales platform, more than 60% prefer buying indirect — through traditional resellers, MSPs, or retailers. When choosing between the two indirect-sales channels, SMBs have a strong preference for B2B providers.

SMB Buying Preferences by Channel



These buying preferences are primarily about who SMBs buy from rather than how they source. Many SMB buyers pursue a hybrid approach that combines self-service research with expert input. A sizable portion conduct much of their evaluation independently but still want the option to consult with experts when needed. Fully consultant-led purchasing remains a smaller part of the market, reflecting SMBs' growing confidence in navigating options independently.

SMB Preferences for How They Buy IT Products & Services



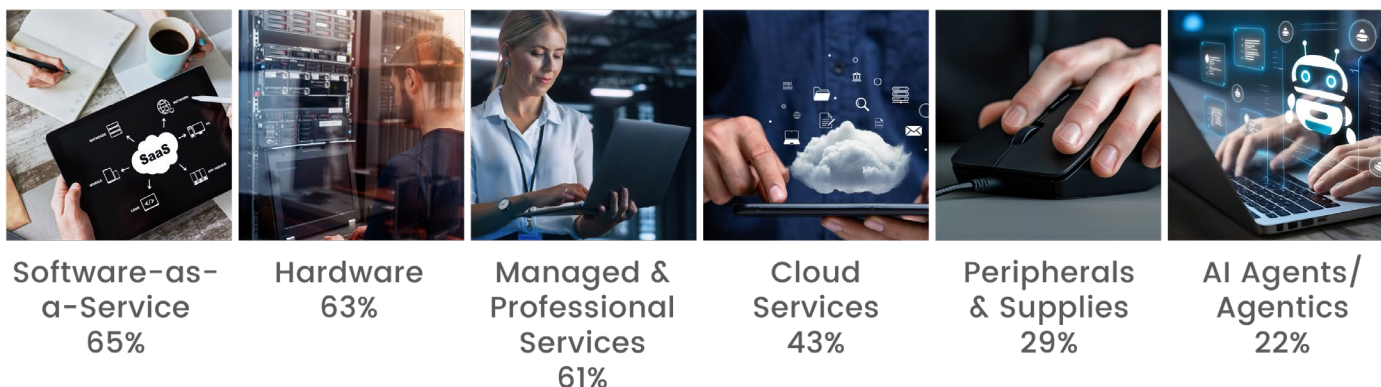
Fully autonomous, self-guided buying remains limited. Only a small percentage of SMBs are comfortable making decisions without external input. Emerging forms of guidance, such as AI-based applications, are still in the early stages of adoption. Traditional sales interactions, with a salesperson directly leading the purchase, account for a small share as well, as SMBs continue to favor models that give them more flexibility and control over the buying process.

Buying Through Marketplaces

“Self-service” purchasing often means sourcing through a marketplace, whether hosted by a vendor, solution provider, or retailer. As demand grows for self-service options and vendors continue shifting their go-to-market models to platform-based selling, partners are adapting accordingly. Many now enable customers to transact digitally through their own marketplaces, often with the support of intermediaries like Pax8. Others are leveraging proprietary e-commerce platforms or private offers facilitated through hyperscaler marketplaces.

Marketplaces and digital sales outlets aren’t limited to cloud services. SMBs are increasingly using these platforms to procure a broad range of technology solutions, including software subscriptions, hardware components, infrastructure products, and even professional services.

Products SMBs Buy Through Marketplaces



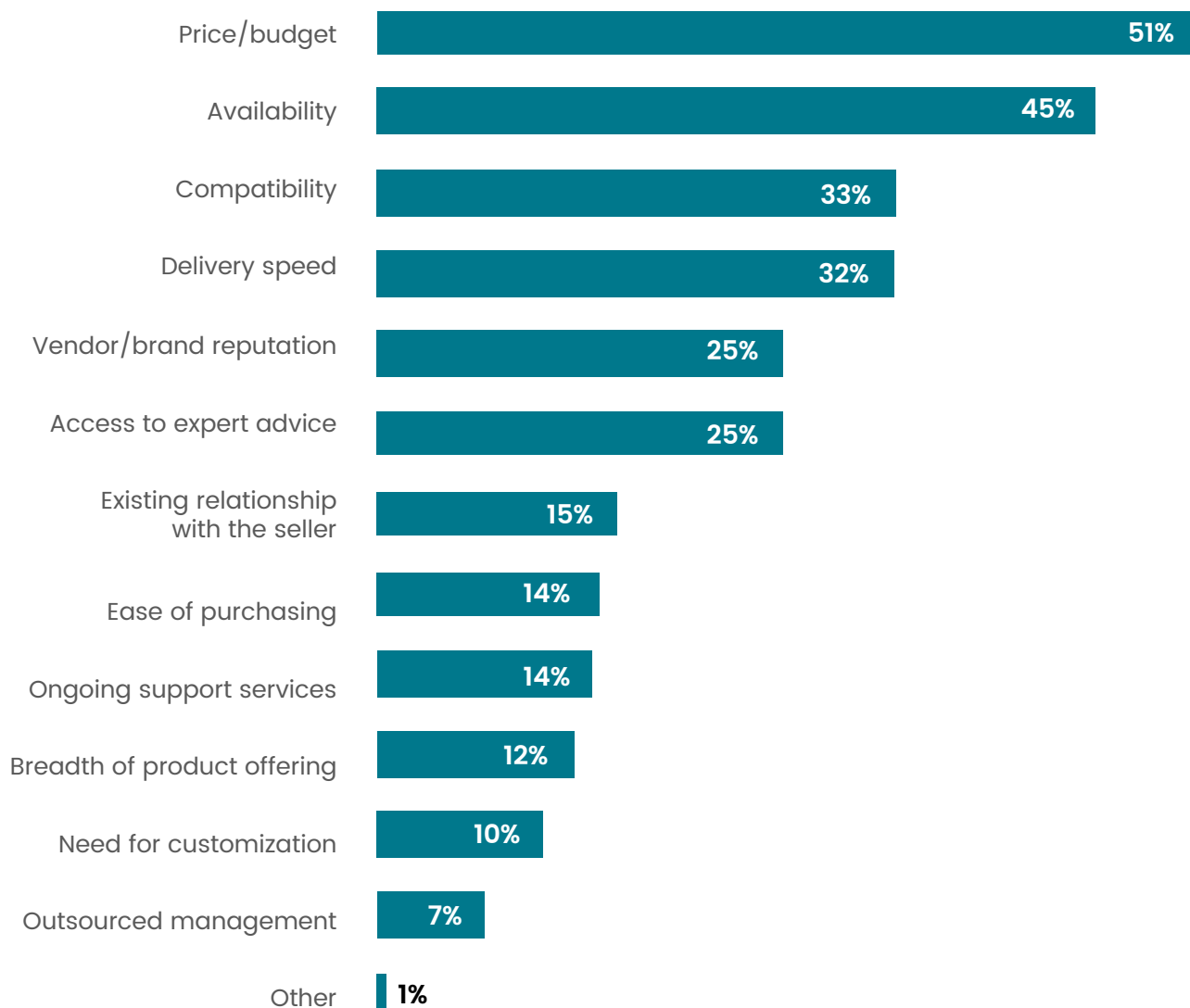
As vendors and partners expand their digital catalogs, SMBs can source bundled solutions that combine licensing, devices, managed services, and technical support through a single transaction. This end-to-end availability allows SMBs to simplify procurement, reduce administrative overhead, and accelerate deployment, all while maintaining flexibility in how they engage with vendors and service providers. The growing breadth of offerings reflects an ongoing shift toward platform-based selling models that consolidate purchasing, fulfillment, and service delivery into unified digital experiences.

A significant driver of SMB IT buyers researching technologies and purchasing through marketplaces and digital sales platforms is, again, the Amazon Effect. Amazon, which has been around for 30 years now, initially focused on book sales but has since become the “everything store,” where consumers can buy anything from paper clips to modular homes. Built on the concept of superior end-to-end customer experience, Amazon epitomizes ease of use with searchable products, rich descriptions, seemingly transparent pricing, easy purchasing, fast fulfillment, and stress-free returns.

SMBs want the same experience with their IT purchases. Four of the top five reasons SMBs say they purchase through marketplaces are convenience (they can research and buy on their own timelines), better pricing (they’re getting the best price without haggling), access to reviews (they can see other buyers’ experiences), and speed (they can buy now and get it fast).

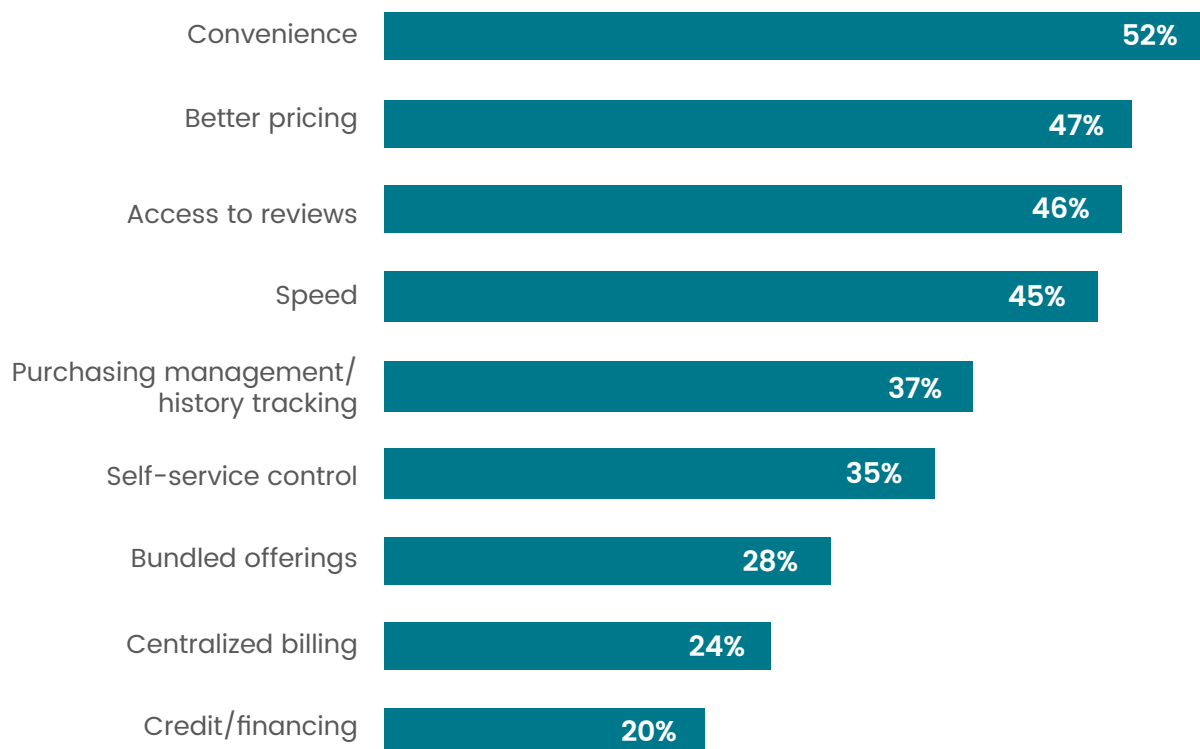
Budget, availability, and speed of delivery are three of the top six factors influencing SMB purchasing decisions. The remaining considerations — compatibility with existing systems, access to expert advice, and brand reputation — further shape how SMBs evaluate their sourcing options. Collectively, these factors often lead SMBs to marketplaces for many of their purchases, where they can compare prices, check product availability, assess technical compatibility, and access expertise from vendors or partners. Marketplaces offer SMBs a balance of convenience, choice, and confidence that aligns with their operational needs and resource constraints.

Top Factors in Influencing Purchasing Source Choices



The purchasing and decision-making criteria of many SMB buyers naturally lead them to marketplaces. Most begin their buying journey with self-guided research and product exploration, narrowing their options based on specific needs and requirements. Once they identify the technologies and services that fit, they often turn to marketplaces or digital sales platforms to complete their purchases. In many cases, these platforms are operated by trusted vendors, MSPs, or solution providers, offering SMBs both convenience and confidence as they finalize their decisions.

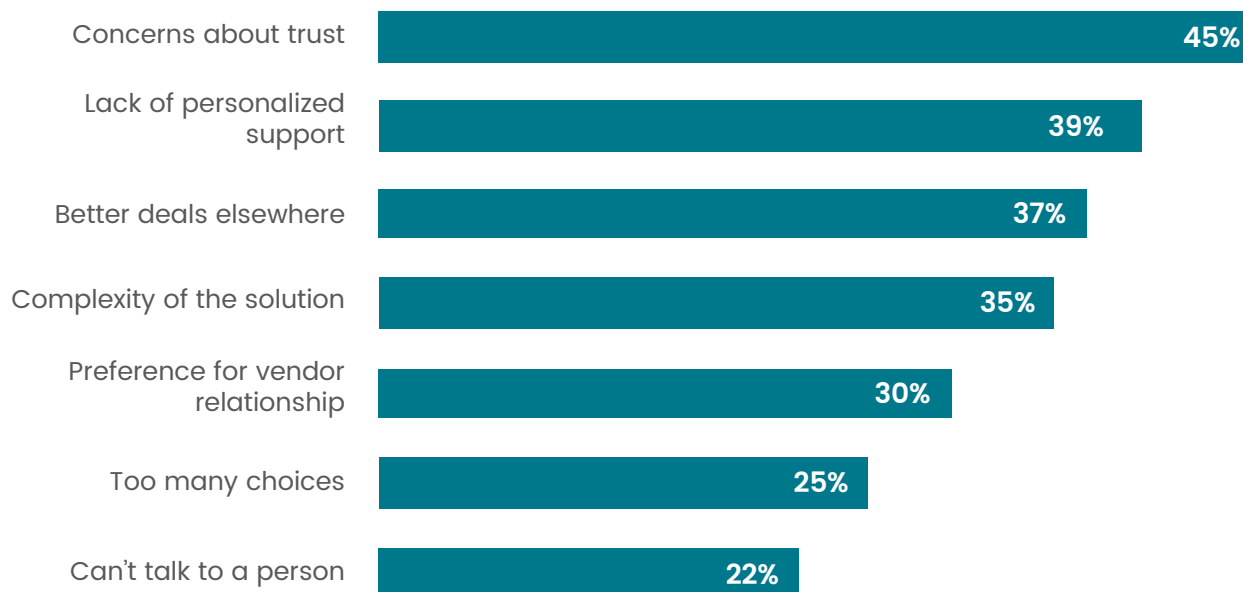
Reasons SMBs Buy Through Marketplaces



While marketplaces simplify product discovery, offer transparent pricing, and reduce procurement friction, many buyers remain hesitant to rely exclusively on these platforms. Concerns around trust, limited personalized support, and the possibility of finding better pricing or terms through direct negotiations often cause SMBs to seek alternatives. Buyers worry about selecting the wrong solutions without expert guidance, facing integration challenges, or lacking adequate post-sales support.

For MSPs and solution providers, building marketplace and digital sales capabilities is only part of the equation. To earn customer trust and secure online business, they must actively address these concerns by offering validation services, personalized guidance, flexible pricing models, and seamless post-sales support. The ability to combine the convenience of marketplaces with the assurance of expert partnership will be critical to driving adoption and long-term customer satisfaction.

Reasons SMBs Don't Buy Through Marketplaces



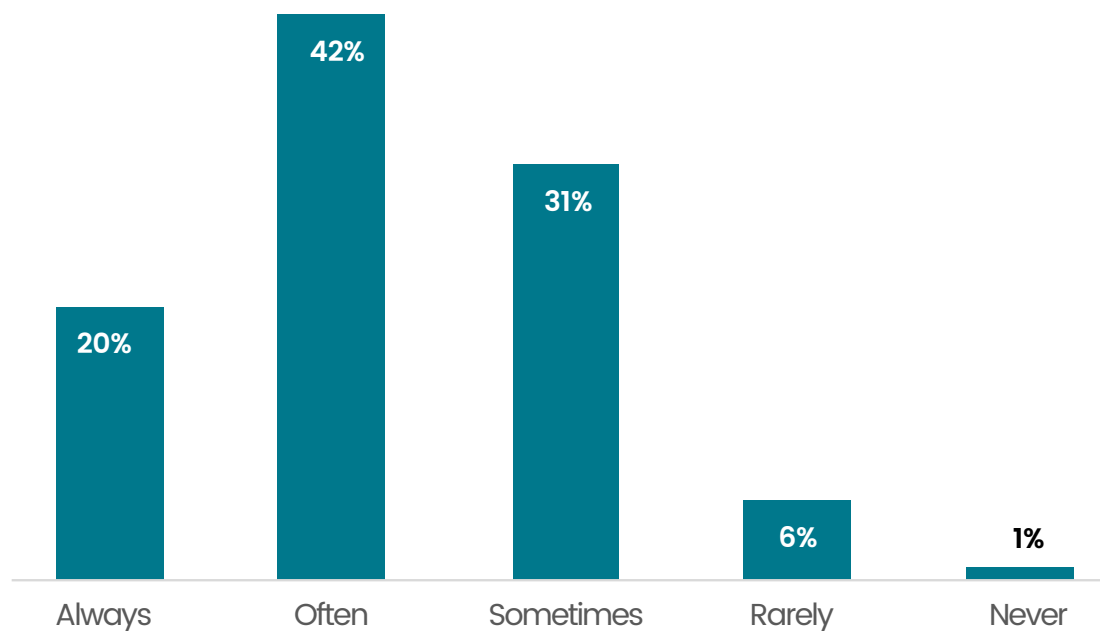
Digital Sales Don't Take Away From MSPs' Value

Many MSPs and IT resellers view marketplaces as a competitive threat, as they draw customers away. Solution providers have complained that they'll walk customers through the buying journey only to have them flip the sale to a marketplace, particularly hyperscalers, which offer attractive pricing and the ability to reduce their spending commitments on other cloud services.

The idea that solution providers lose customers to marketplaces and other sales platforms is more myth than reality. They may lose the initial product sale, but they often pick up the customers on the other side of the transaction.

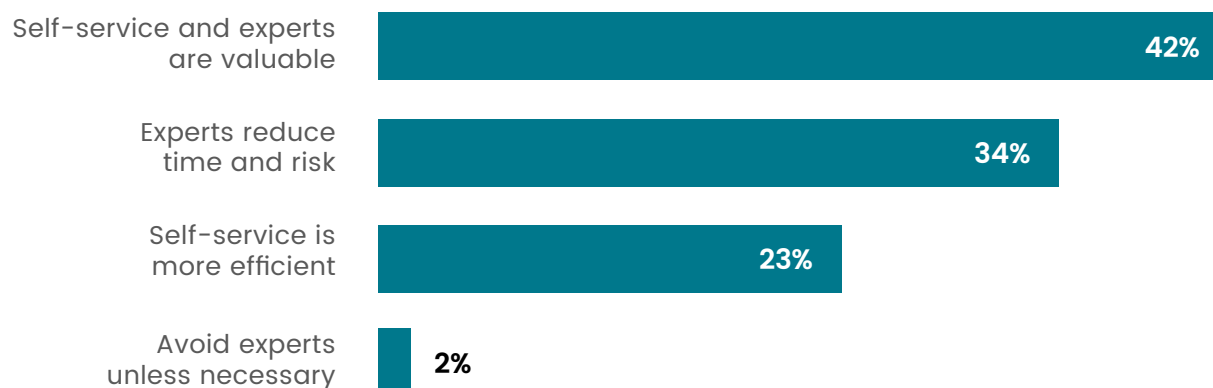
SMB buyers report that they frequently seek the support and guidance of IT professionals during or after the research and buying process. They recognize that, despite confidence in their knowledge and abilities, they frequently don't know what they don't know. The IT market — even at the SMB level — is replete with complex technologies that overlap in addressing similar requirements. SMBs say they have difficulty understanding what products meet their needs, discerning which integrate with their existing and other systems, and calculating the total cost of ownership.

Frequency of Seeking Professional Help During or After Researching Options



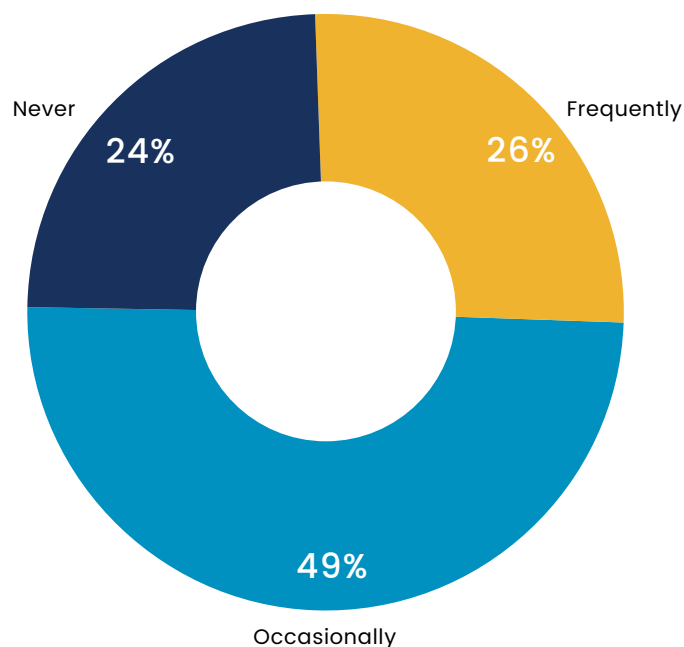
SMBs will engage with IT professionals to ensure they're making the right choices, but these engagements are contextual. The more a buyer's confidence in their knowledge and skills aligns with their needs, the more likely they are to go it alone. The more complex their requirements, or the technology, the more likely they are to engage with an MSP or other IT professional. Also, SMBs tend to be open-minded, keeping their options open in case they need support. Only 2% say they never engage with an IT professional during the purchasing process.

Value of IT Expert Guidance in Purchasing Process



Even when SMBs don't purchase directly through MSPs or solution providers, they remain highly dependent on their support. Three-quarters of SMBs report seeking services and assistance from third parties — including MSPs, consultants, and integrators — to help with their technology purchases. Many SMBs indicate that even when buying through alternative sources such as third-party marketplaces, they still occasionally or frequently turn to trusted MSPs or solution providers for implementation, integration, and ongoing support.

Frequency SMBs Seek Professional Help After Purchasing



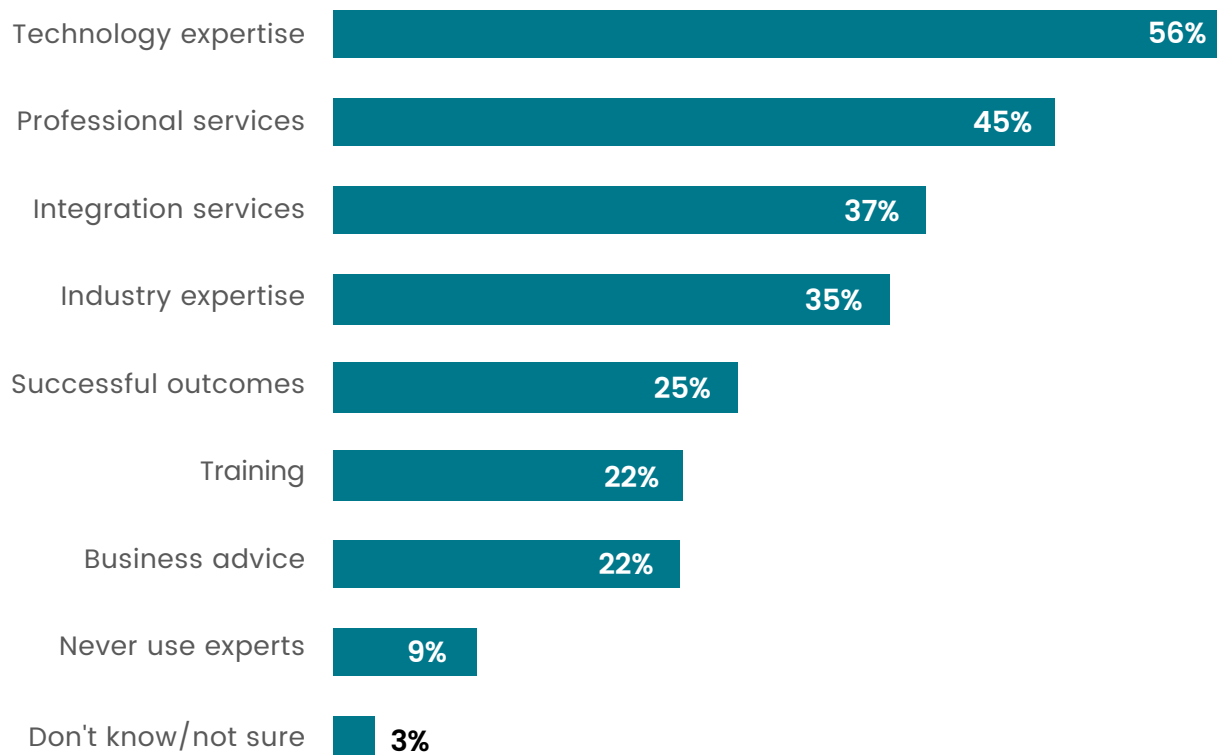
SMBs, particularly those with IT operations led by younger professionals, may favor self-guided research and self-service purchasing through marketplaces. However, they often encounter the practical limitations of managing and optimizing complex technology investments. As a result, MSPs and other service providers frequently have opportunities to engage after the initial purchase, delivering the expertise and support required to maximize the value of these investments, even if they weren't involved in the original transaction.

Picking the Right Support

More than two-thirds of SMBs regularly source products through an MSP, reseller, or other IT solution provider. While they have a strong desire to act independently, they tend to trust and value the services, support, and expert guidance they receive from their solution providers.

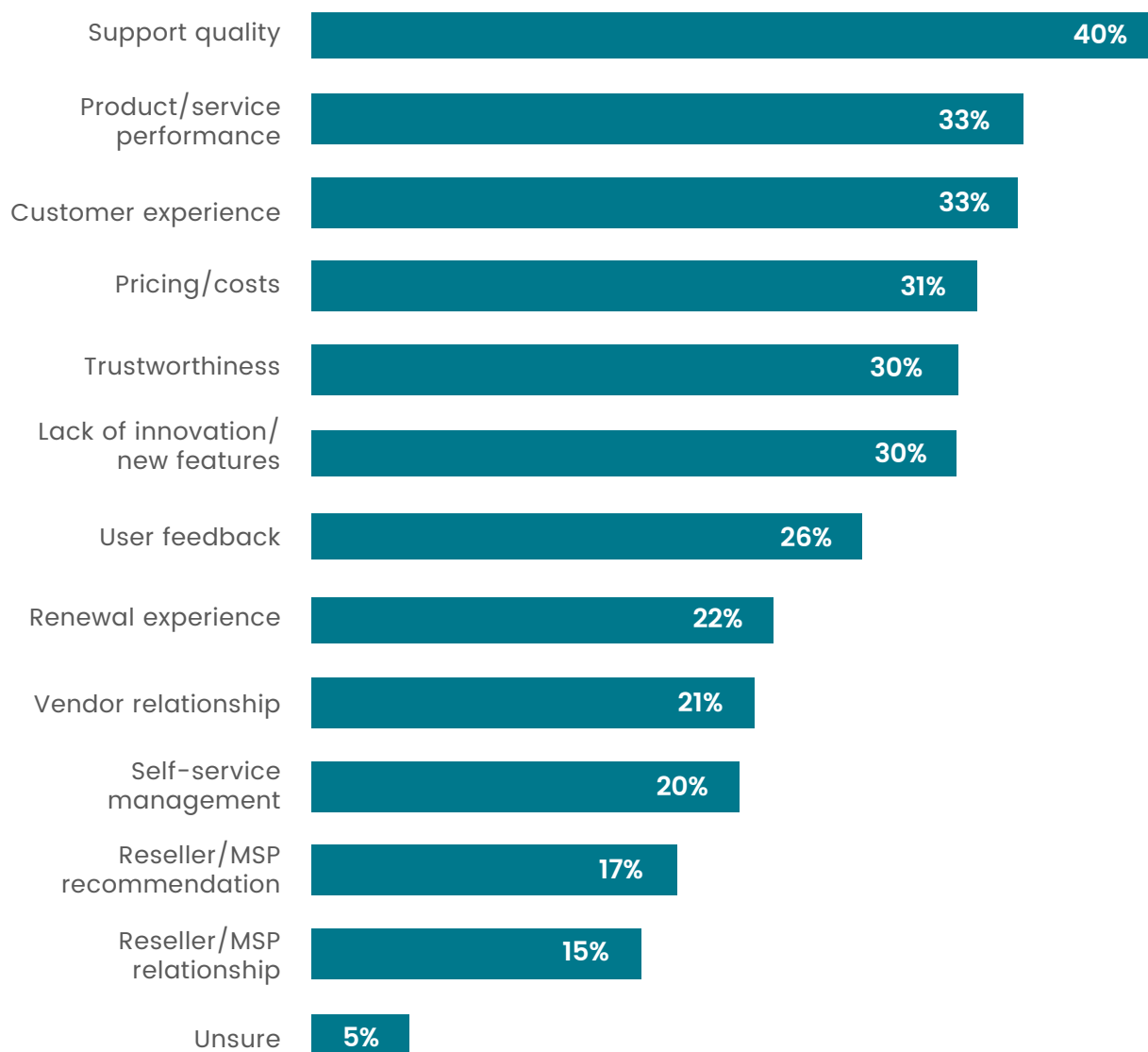
But that trust isn't always easy to come by. SMBs have stringent requirements for how they select their expert support. When they seek help, they want providers that really understand the technology and can provide high-quality professional support services.

SMB Criteria for Selecting Expert Support



Once engaged with an SMB, MSPs and solution providers must consistently make an effort to meet a wide range of needs and expectations. Whether the SMB is purchasing products directly or seeking post-sales support, quality remains the primary expectation. With limited budgets and resources, SMBs have little patience for products or services that fail to deliver promised performance or value. MSPs and solution providers that fail to consistently deliver risk losing these customers to alternative providers that can better align with their operational and financial requirements.

SMBs' Top Reasons for Leaving an MSP or IT Provider



Segmenting Buying & Selling Meeting Points

While marketplaces and digital sales channels aren't suitable for every transaction, they're playing an increasingly important role in the SMB buying journey. SMBs report that marketplaces and MSPs will become their primary sources for acquiring IT products and services over the next five years. This represents a significant evolution from a time when solution providers functioned almost exclusively as gatekeepers, controlling access to technology and managing most aspects of procurement on behalf of their clients.

The shift reflects broader changes in how SMBs approach technology adoption. With greater access to information and self-service options, SMBs are more empowered to initiate purchases independently while still recognizing the value of expert guidance. As a result, MSPs and solution providers are repositioning themselves from transactional intermediaries to strategic partners that support lifecycle management, optimization, and business outcomes. This hybrid model — blending marketplace accessibility with expert services — is quickly becoming the new norm in SMB technology procurement.

Most Significant SMB Buying Sources Over the Next Five Years



Marketplaces
49%



Managed Service Providers
29%



Direct From Vendors
45%



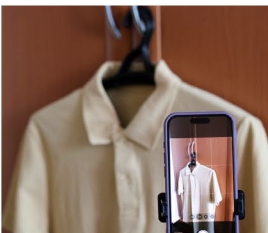
Agents & Advisors
31%



Distributors
31%



Retail Outlets
26%



VARs/Resellers
20%



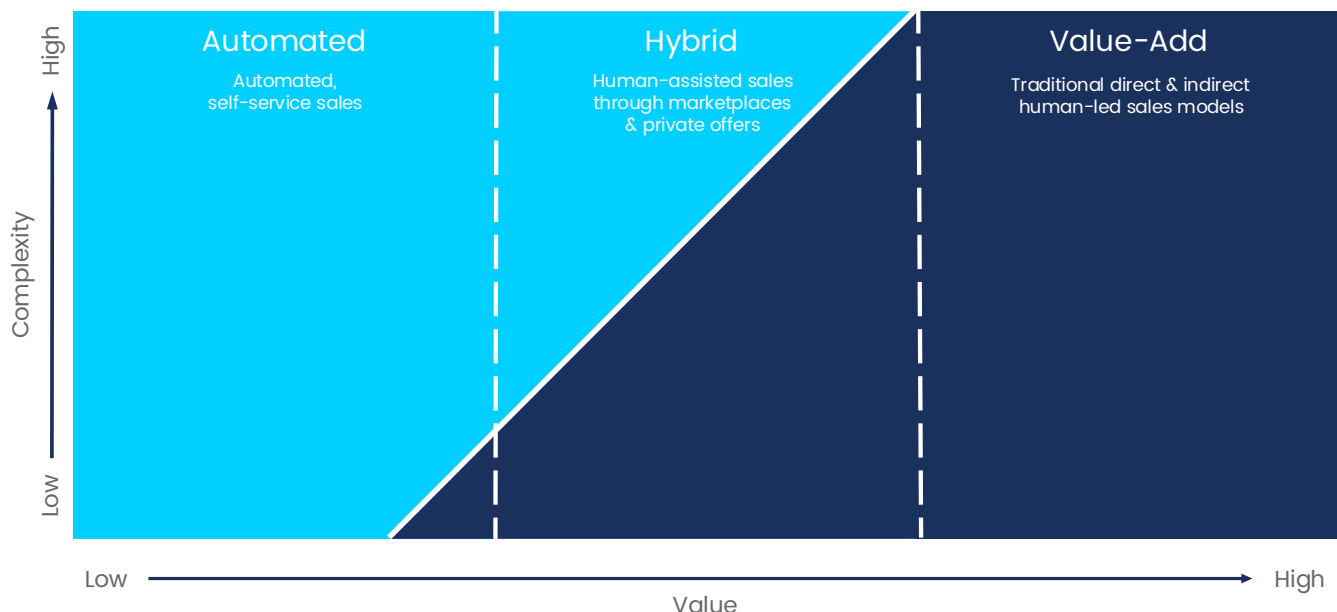
Not Sure
18%

The notion that SMBs must choose between one purchasing channel or another is misguided. SMBs rarely rely on a single procurement source. Instead, they utilize a combination of channels tailored to their immediate needs, budget considerations, and comfort level with a given technology. Purchasing decisions are often situational, influenced by factors such as product complexity, deployment timelines, and the availability of internal expertise.

What SMBs consistently seek are flexible purchasing options that accommodate these variables. Many gravitate toward providers that offer a combination of self-service and guided support, such as MSPs that operate e-commerce portals alongside their managed services. This blended approach enables SMBs to manage simple transactions independently while still accessing expert guidance and services when they encounter more complex needs. The ability to deliver both flexibility and support is becoming an increasingly important differentiator for MSPs and solution providers competing for SMB business.

Marketplaces are well-suited for straightforward, low-complexity purchases, such as commodity hardware, standardized software subscriptions, and routine services, which allow buyers to re-search, evaluate, and complete transactions without human interaction. Automation delivers the efficiency, transparency, and speed that many SMB buyers expect, particularly those that prefer frictionless, self-directed experiences for repeatable or well-defined purchasing scenarios.

Segmenting Marketplace & Human-Led Sales



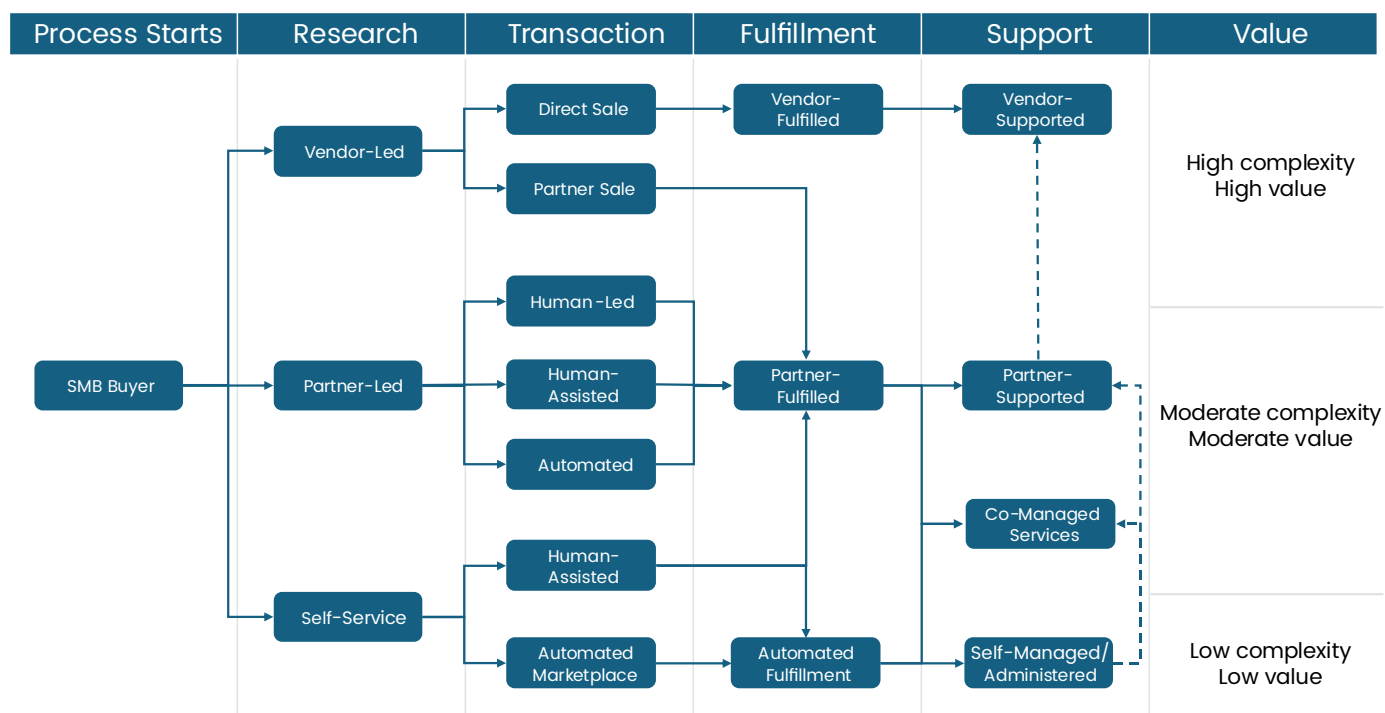
However, as the complexity, value, and integration requirements of a purchase increase, so too does the need for human expertise. Sophisticated technologies, multi-product solutions, high-value deployments, and customized configurations often demand consultative selling, engineering support, and project management to ensure proper design and successful outcomes.

Sellers must align their engagement models to these dynamics, reserving automated, digital pathways for simpler transactions while guiding customers through more intricate decisions with sales and technical resources. This segmentation ensures that buyers receive the appropriate level of support throughout their purchasing journey and that sellers maximize their opportunities to intercept buyers along their purchasing path.

Not every sale follows the same channel or purchasing process. When acquiring products and services, SMBs typically engage through three distinct pathways, which closely align with the Automated, Hybrid, and Value-Add segments of the broader sales model. Each pathway reflects varying degrees of complexity, buyer involvement, and need for external expertise.

MSPs that recognize and align their sales engagement to these pathways are better positioned to meet customers at each stage of their buying journey — whether SMBs are conducting self-directed research, executing transactions, or seeking post-sales support. By tailoring their sales motions to fit these patterns, MSPs can improve their relevance, responsiveness, and success in capturing and retaining SMB customers.

SMB Pathways for Purchasing Products & Services



To align with these purchasing pathways, MSPs should consider the following actions:

- Provide SMB customers with self-service information resources that address use cases, product capabilities, and available services.
- Enable SMB buyers to choose from multiple purchasing options, including self-service digital sales platforms, assisted digital transactions, and expert-led sales engagements.
- Offer SMBs access to information, services, and support at every phase of the buyer's journey – from initial research through post-sales deployment and solution optimization.
- Create mechanisms for SMBs to purchase additional resources, services, and support after the initial sale, even if the original transaction occurred through a third party or marketplace.
- Maintain a consistent focus on delivering superior quality and value-added services that enhance the overall value and performance of the customer's technology investments.

Disclosures & Methodology

Pax8 commissioned Channelnomics to conduct this survey as part of a series of sponsored research projects aimed at tracking the evolving needs and trends of SMB technology buyers. While Pax8 commissioned this research, the company did not influence the analysis, findings, or reporting contained in this document.

The survey includes responses from 615 small and midsize businesses across North America, Europe, and the Asia-Pacific region. All respondents represented companies with 10 to 500 employees, with the majority concentrated in the 100- to 500-employee range. Each participant held IT purchasing responsibilities within their organization and had made technology purchases within the past six months.

The survey was conducted between April 15 and May 15, 2025, using an online, self-administered questionnaire with aided response options. The results carry a margin of error of $\pm 5.5\%$ with a 95% confidence level. Channelnomics believes that the data and insights presented in this report accurately reflect the prevailing experiences and sentiments of the SMB community at the time of the survey. Channelnomics reserves the right to revise or amend the analysis and reporting without notice. ■



About Us



Channelnomics is a global analyst and research firm that helps technology vendors and service providers fine-tune their channels, win customers, and sharpen their competitive edge. The company offers a portfolio of best-in-class products and services, including research, market analysis, thought-leadership content, and expert guidance. The innovative analysts at Channelnomics leverage data to develop customized route-to-market strategies for any client that wants to translate vision into value.

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Pax8 is the technology Marketplace of the future, linking partners, vendors and small-to-mid-sized businesses (SMBs) through AI-powered insights and comprehensive product support. With a global partner ecosystem of nearly 40,000 managed service providers, Pax8 empowers SMBs worldwide by providing software and services that unlock their growth potential and enhance their security. Committed to innovating cloud commerce at scale, Pax8 drives customer acquisition and solution consumption across its entire ecosystem.

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