



Pax8 SMB Buyers
Europe



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In Europe, B2B buyers, especially those at small and midsize businesses (SMBs), have shifted from relying on salespeople to using digital tools to guide their purchasing decisions. While sales reps once controlled access to product details, pricing and supplier options, the internet now empowers buyers to research independently. Search engines, peer reviews and social media have become primary sources of information, reducing the need for early engagement with sellers.

This digital-first mindset has led many SMBs to embrace marketplaces and e-commerce platforms for self-service procurement. These channels offer quick comparisons, transparent pricing and simplified transactions. According to McKinsey and Boston Consulting Group, more than half of SMBs now favour these models and plan to expand usage. However, this shift doesn't sideline traditional partners. It gives managed service providers (MSPs) and resellers new opportunities to meet buyers where they are and offer value-added services.

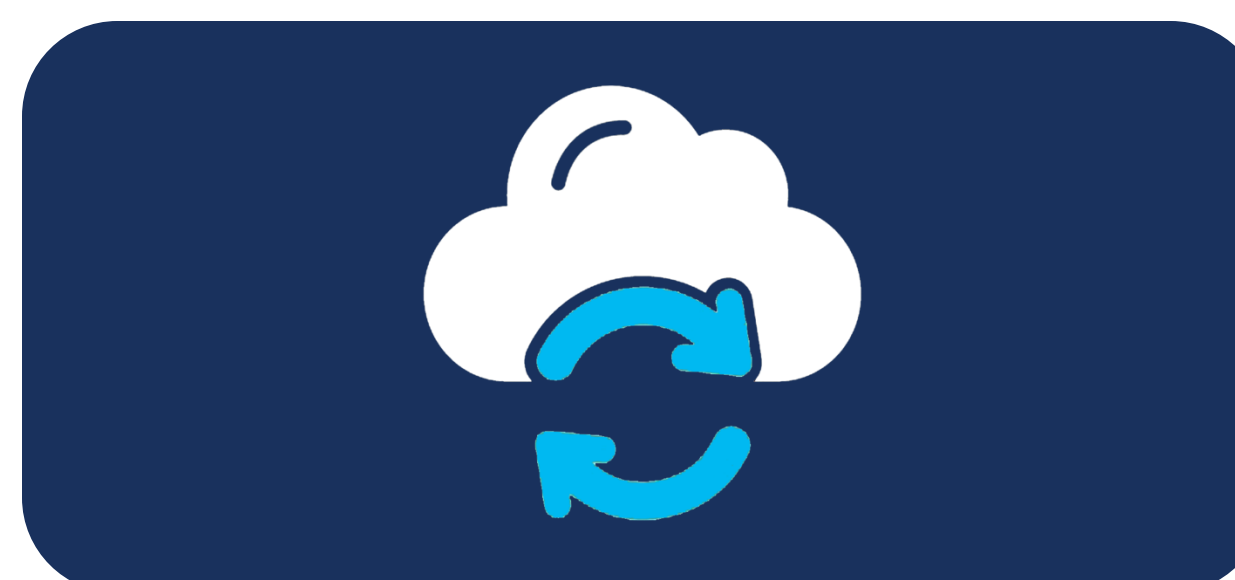
Even with streamlined buying, SMBs often need help deploying, integrating and managing solutions. Trusted MSPs and resellers remain vital for this reason. By understanding how today's buyers move through the digital journey, partners can intercept at key moments to deliver services, support and long-term value.

This report by Channelnomics and Pax8 explores how to engage SMBs across these evolving sales channels.

Sizing the European SMB IT Market



The European SMB IT market is estimated at £49–£65 billion / €56–€73 billion annually, with some analyst firms projecting the opportunity could exceed £152 billion / €172 billion. This wide range reflects both the complexity and potential of the segment. For vendors, service providers (MSPs) and channel partners, SMBs represent a substantial and growing opportunity to deliver IT products, services and support tailored to the needs of smaller businesses.



SMBs in Europe are significant consumers of software, encompassing both traditional on-premises solutions and contemporary cloud-based offerings. Software investments alone represent a considerable share of total IT spending, but they also generate subsequent demand for services such as implementation, integration and ongoing management. This has created new growth avenues for Managed Service Providers (MSPs) and solution providers specialising in meeting SMB requirements across the continent.



Much of the IT value in the SMB segment comes from services layered on top of software and infrastructure. These services include monitoring, maintenance, cybersecurity, and user support. They account for a large portion of the addressable revenue opportunity. For partners focused on delivering high-value outcomes, the European SMB segment remains one of the most accessible and scalable markets in the IT channel.

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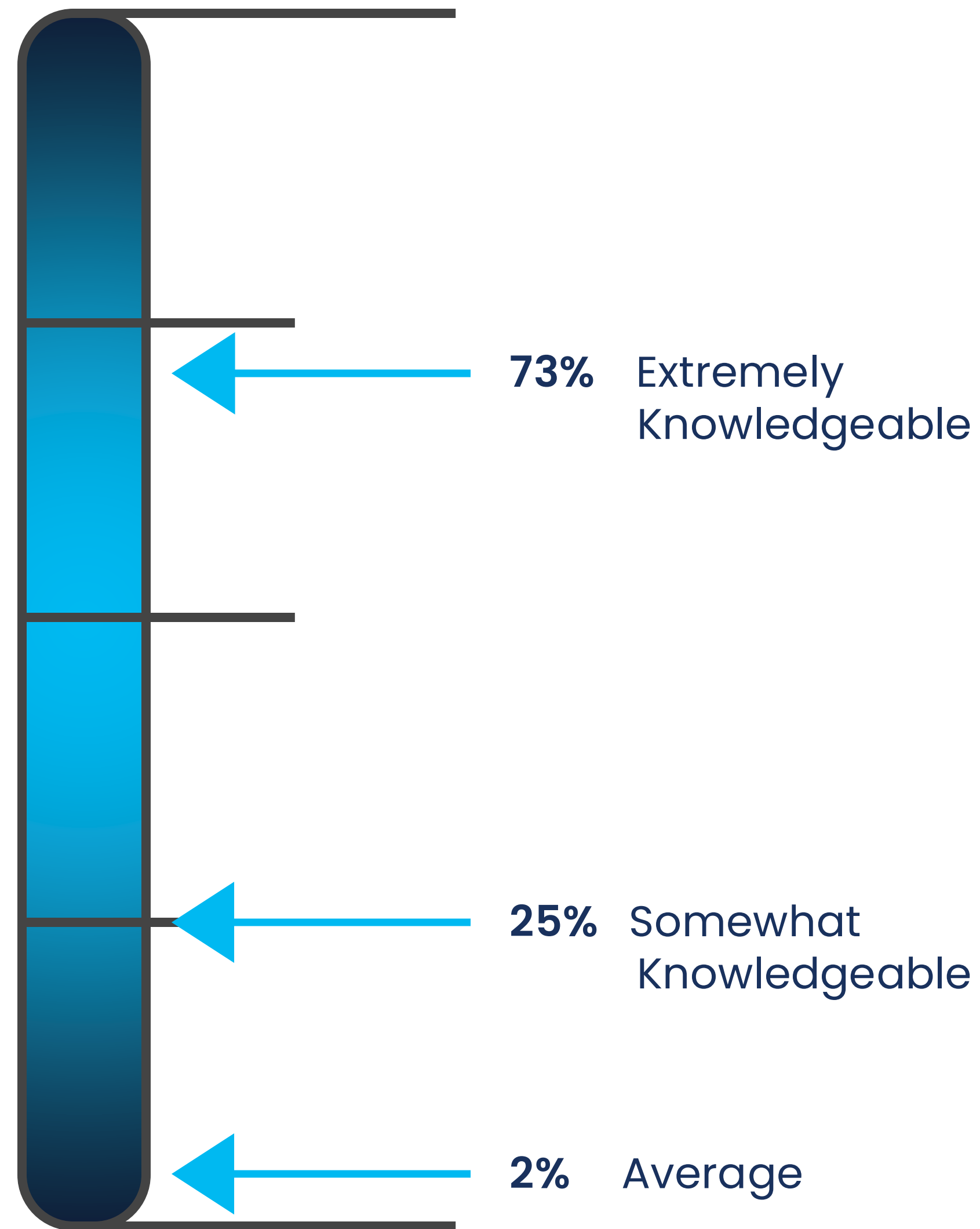
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Most SMB IT decision makers are making purchases on behalf of their entire company or for their IT departments that support their company. It's a lot of responsibility, but the vast majority consider themselves "extremely knowledgeable" about the technology products and services they're charged with evaluating, trialing and acquiring.

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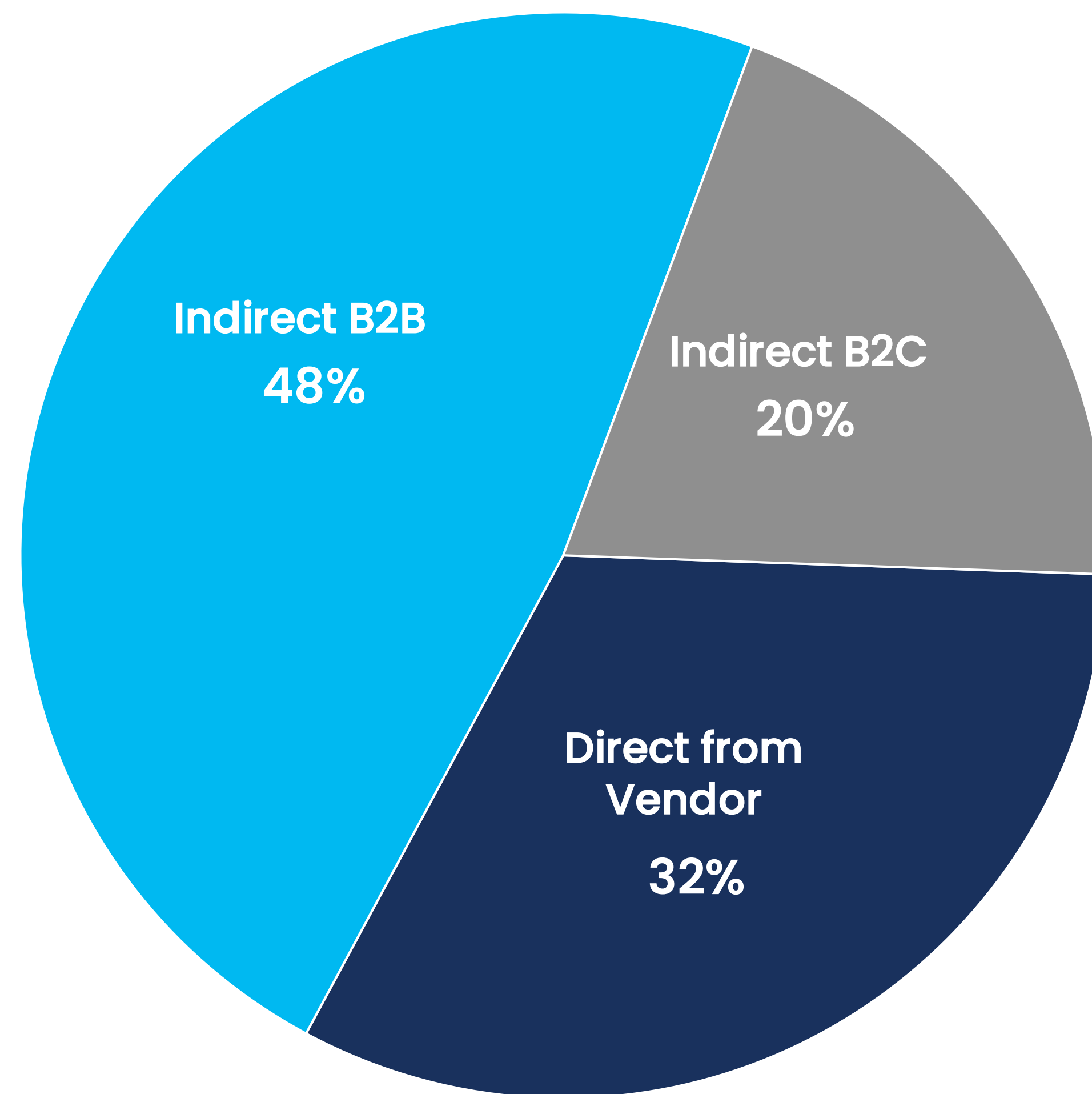
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SMBs Prefer Purchasing Indirect



When it comes to where small and medium-sized businesses (SMBs) in Europe acquire their technology products and services, the overwhelming majority prefer to work through indirect channels. Fewer than one-third of European partners choose to source directly from technology vendors. Instead, most rely on B2B or B2C partners, such as managed service providers, resellers and systems integrators, to fulfil their technology needs.

The value of established relationships drives this preference. SMBs trust their channel partners to provide not only competitive pricing and logistical convenience but also informed guidance and responsive support. These long-standing relationships give decision makers confidence that they're receiving fair treatment and recommendations tailored to their business, rather than being routed through transactional, vendor-led sales motions.

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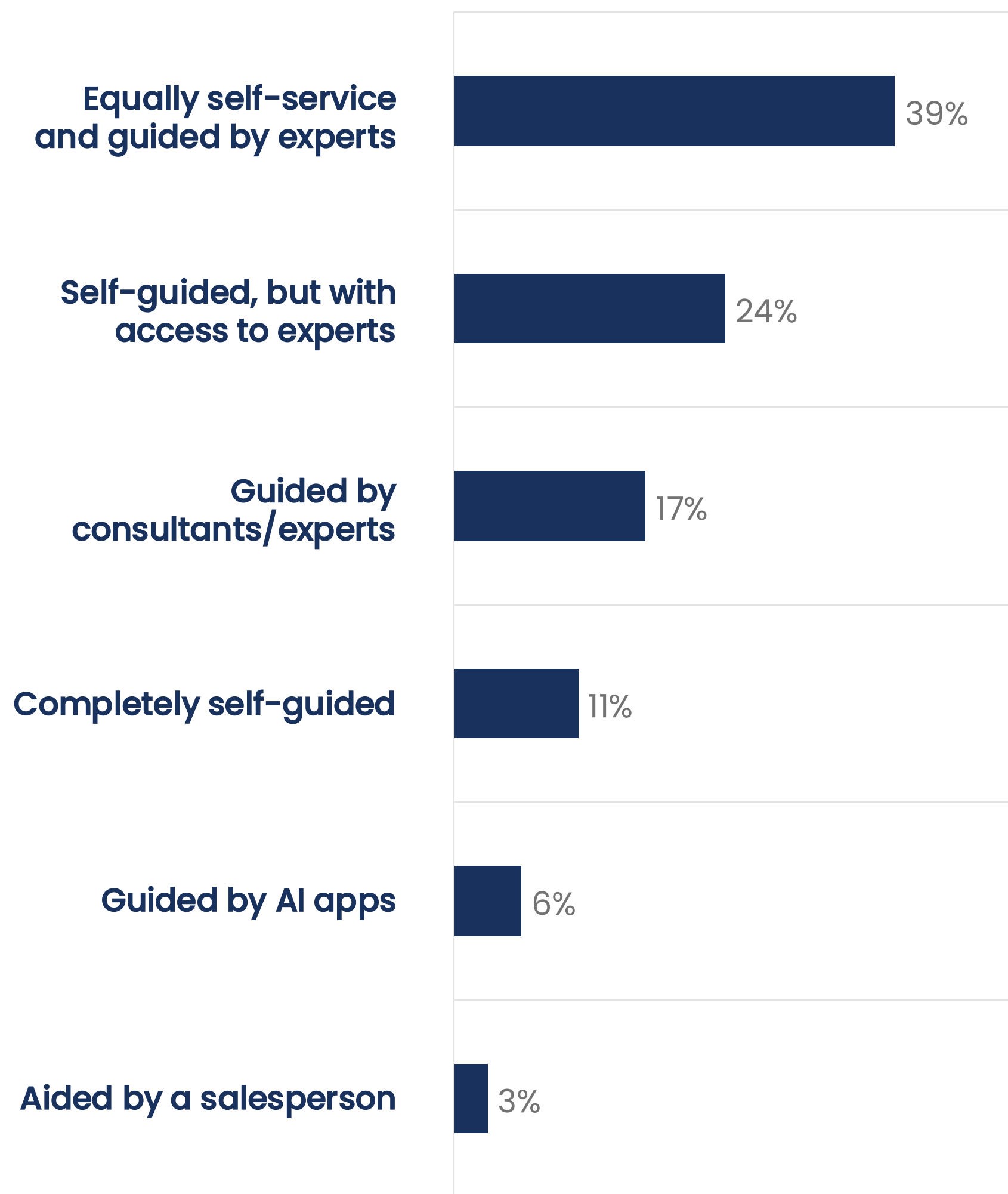
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SMB Buyers Approach Purchasing as a Solo Exercise



European SMB IT buyers increasingly prefer hybrid purchasing journeys that allow them to maintain control while still benefiting from expert input. A significant proportion, 39% report splitting their process equally between self-service research and expert guidance. Another 24% follow a primarily self-guided path but want access to expert support when needed.

Only 11% say they are completely self-guided and just 3% rely solely on salespeople, highlighting a clear shift away from traditional vendor-led sales engagement. Meanwhile, 17% lean on external consultants or experts to steer their buying process 6% say they use AI applications as part of their decision-making. These findings suggest that European SMBs value autonomy but still want assurance and clarity from trusted sources, especially when navigating complex or high-stakes technology decisions.

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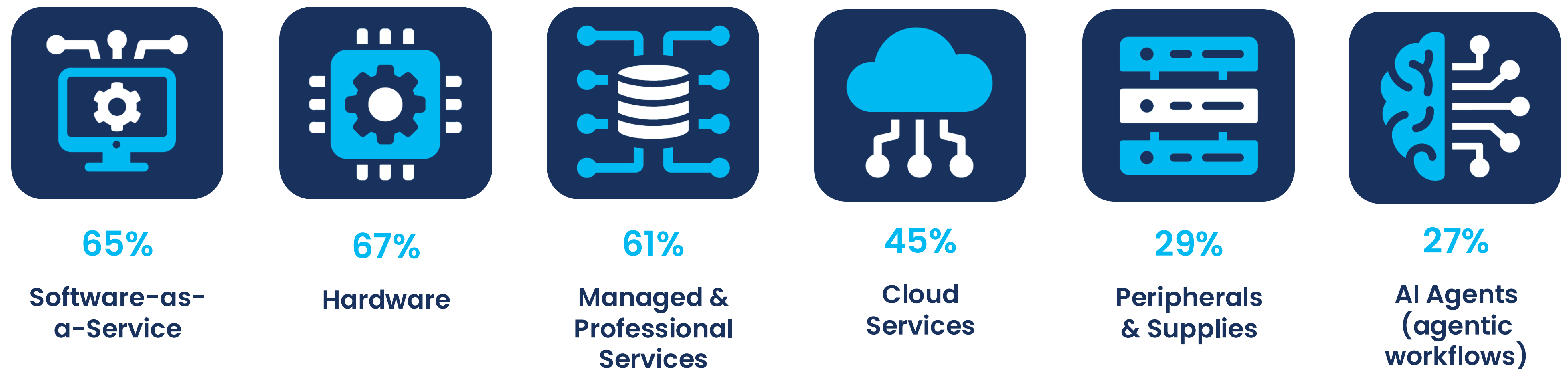
What SMBs Buy Through Marketplaces & E-Commerce

“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 hyperscale 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.



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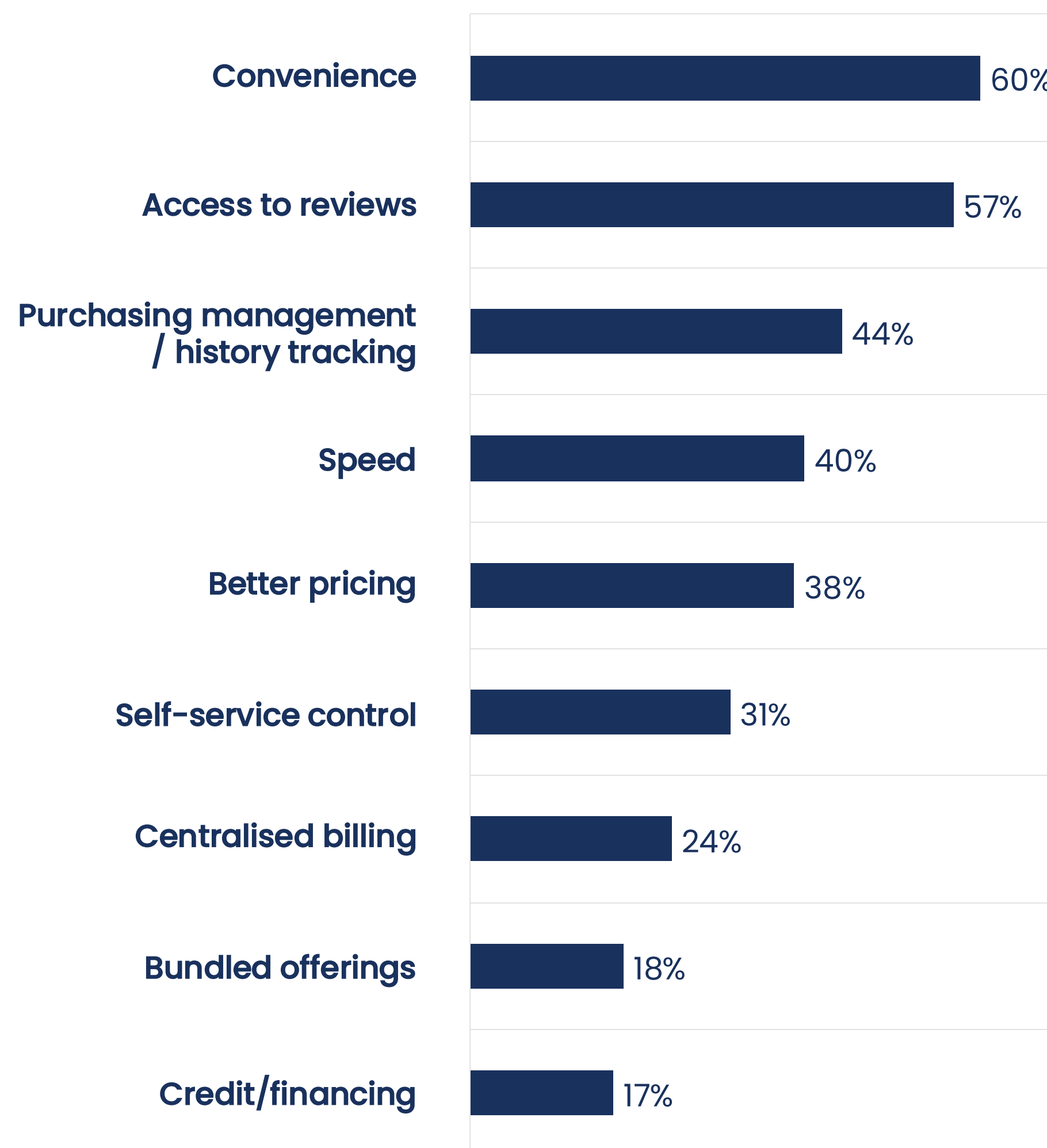
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What Draws SMBs to Marketplaces & E-Commerce Sites



For European SMBs, marketplaces have become more than just a convenient place to buy technology. They're now a critical part of the decision-making process. These platforms offer the ease and transparency buyers have come to expect from consumer experiences, with features like peer reviews, product comparisons and purchasing history all in one place.

Convenience tops the list of benefits, with 60% of SMBs citing it as a key reason for using marketplaces. Many also rely on them for user reviews (57%), faster transactions (40%) and tools to track purchasing activity (44%). While competitive pricing remains important, it's no longer the sole draw.

Today's B2B marketplaces serve as flexible engagement hubs. They allow SMBs to research and buy on their terms. Often there is the option to connect with experts or advisors when needed. It's this blend of autonomy and support that makes marketplaces such a valuable part of the SMB buying experience.

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Top Factors Influencing Choice of Purchasing Source



43%

Budget and Price



52%

Product Availability



34%

Tech Compatibility



34%

Delivery Speed



27%

Brand Reputation



33%

Access To Expert Advice

European SMBs increasingly expect their IT purchasing experience to mirror that of consumer transactions: fast, flexible and informed. Four of the top five reasons these buyers turn to marketplaces are convenience, better pricing, access to peer reviews and speed. These platforms make it easy to browse, compare and buy on demand, without waiting for traditional sales processes.

Key decision drivers include price sensitivity (53%), product availability (52%) and delivery speed (34%). However, functional requirements also matter. Many buyers evaluate compatibility with existing systems (34%) and appreciate access to expert advice (33%) to ensure the right fit. Brand reputation (27%) also plays a role in guiding choices.

Marketplaces satisfy these demands by offering SMBs a practical balance of value, variety and support. Buyers gain visibility into price and stock, assess technical alignment and draw on advisor insights when needed. All of this is available within a self-directed, user-friendly environment that fits their limited time and resources.

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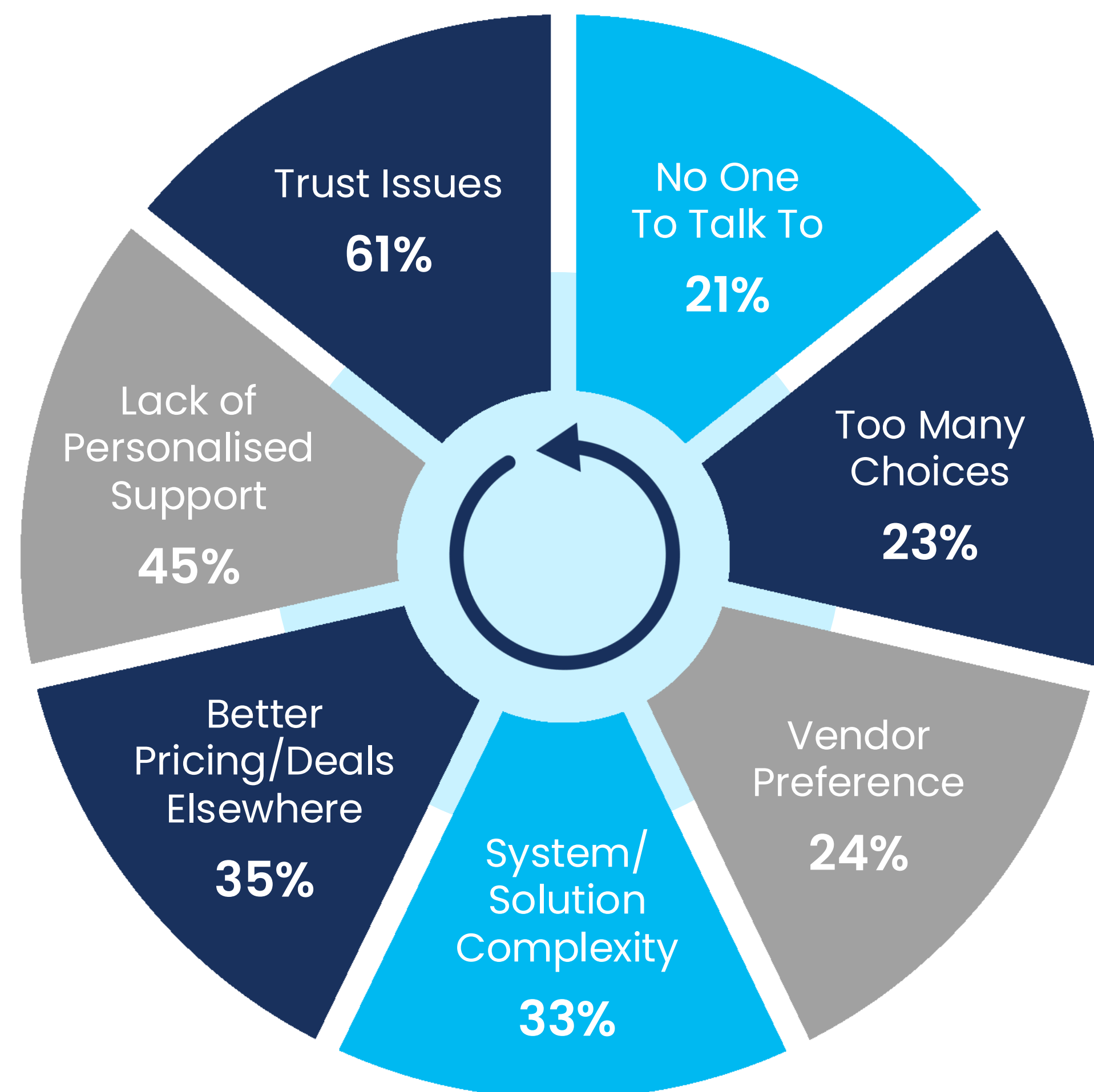
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Reasons SMBs Avoid Buying Through Marketplaces



Despite the growing popularity of digital sales platforms, many European SMBs still hesitate to make technology purchases through marketplaces. Trust remains a major barrier. Sixty-one per cent of buyers cite concerns about seller credibility or data security. Others worry about the lack of personalised support (45%) or fear they'll miss out on better deals elsewhere (35%).

Complex products add to the hesitation. A third of buyers say they're unsure how to evaluate solutions without expert help and nearly a quarter prefer vendors they already know. When integration or long-term support is involved, SMBs often revert to traditional sales channels that offer more tailored guidance. Marketplaces may offer speed and convenience, but SMBs still want human reassurance when making high-stakes decisions.

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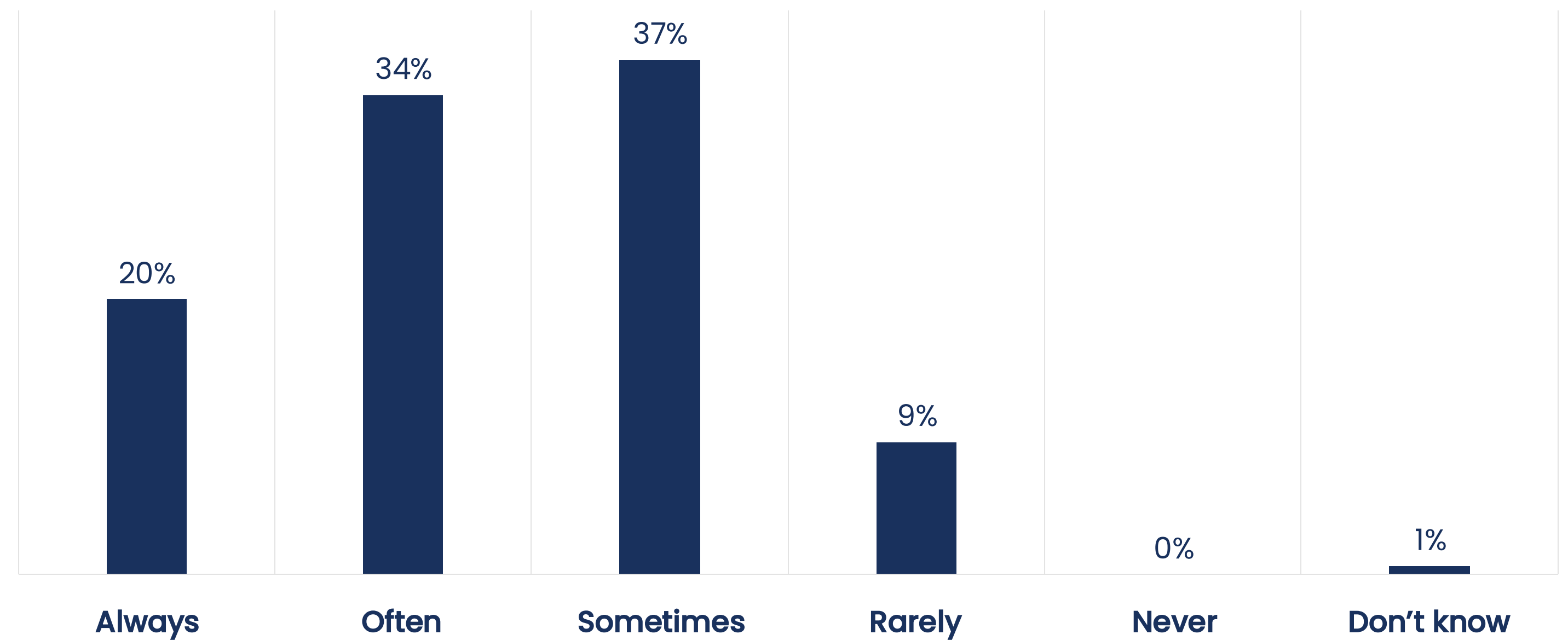
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Buying Through Marketplaces Doesn't Detract From Expert's Value

Frequency SMB Buyers Seek Professional Assistance During or After Purchasing Through Marketplaces



European SMBs may feel confident in their IT knowledge, but many still turn to experts for help navigating the buying process. The market is crowded with overlapping technologies and buyers often struggle to determine which products meet their specific needs, integrate with existing systems or align with total cost of ownership expectations.

More than 70% of SMB buyers say the guidance they receive, often through partners connected to marketplaces, helps them avoid costly mistakes. Whether they're validating a shortlist or clarifying compatibility, buyers say having access to expert advice improves outcomes and saves both time and money. Most SMBs seek support frequently or always, when making important purchasing decisions.

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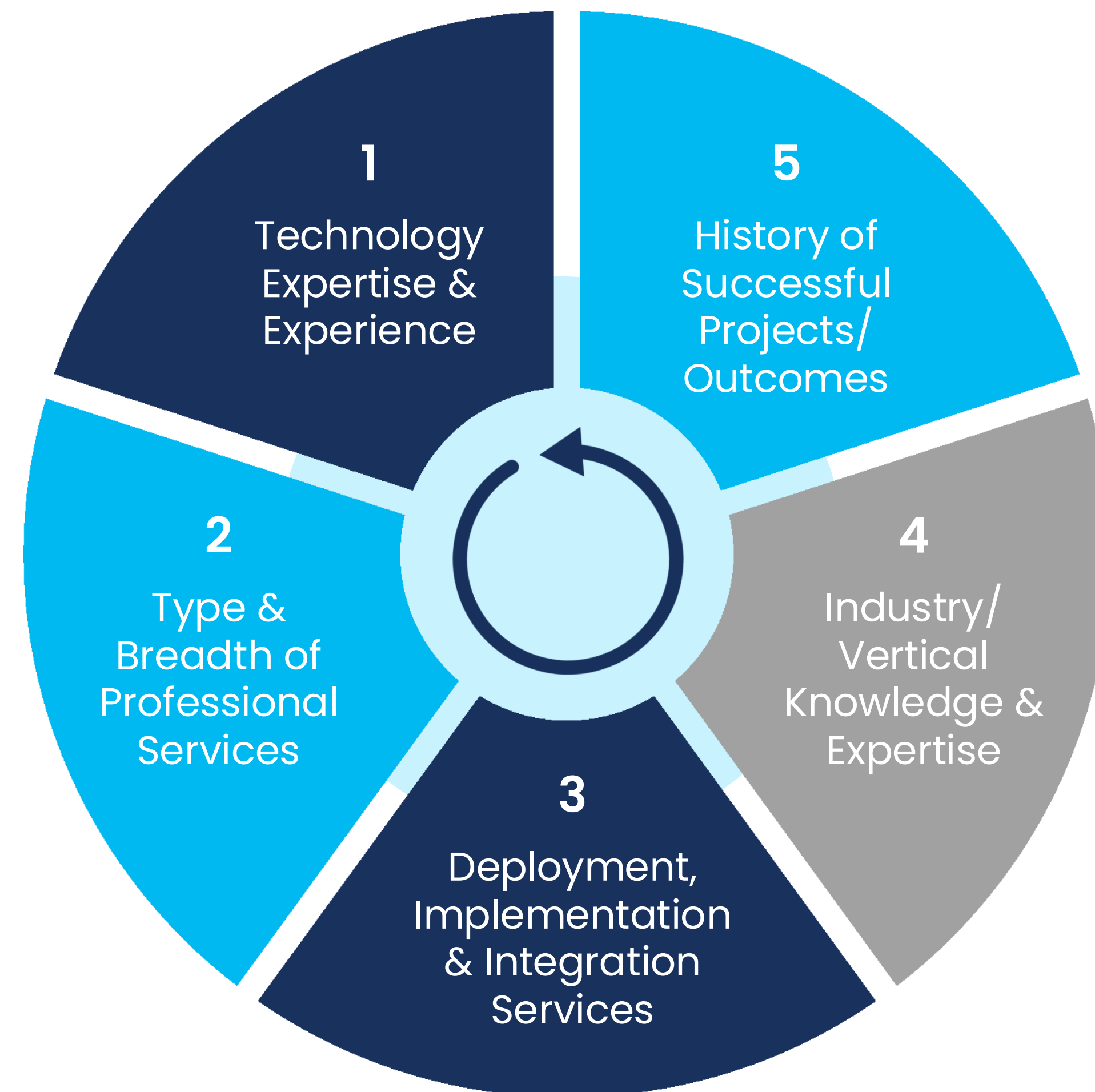
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SMB Buyers Seek & Appreciate True Expertise



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.

However, that trust is not always easy to earn. 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.

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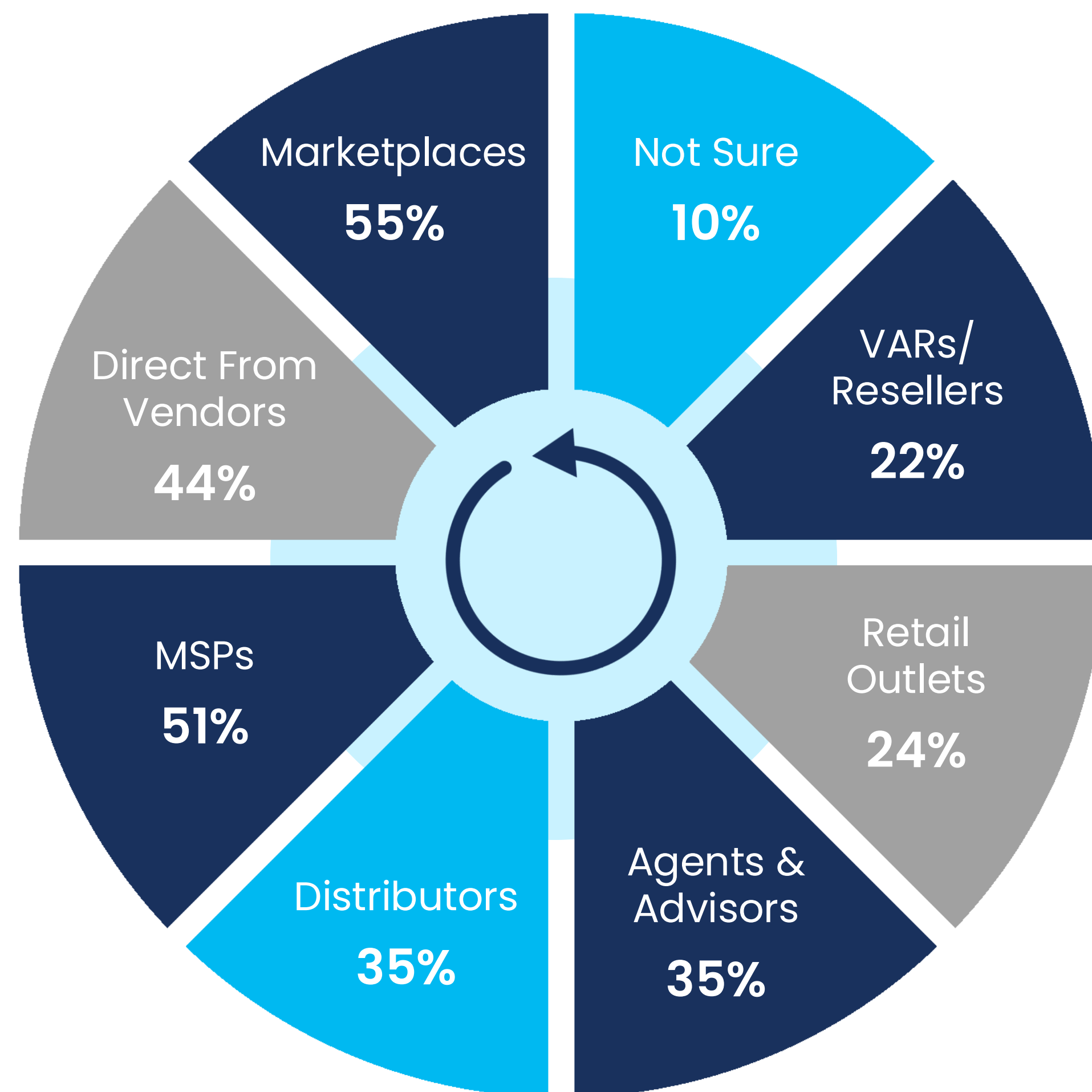
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Most Significant SMB Buying Sources Over The Next 5 Years



European SMBs increasingly rely on a mix of channels to source IT products and services, with marketplaces (55%) and MSPs (51%) emerging as the most frequently used. While direct vendor sales and resellers still play a role, the purchasing landscape is shifting toward models that offer more flexibility, transparency and support.

This marks a clear break from the past, when solution providers controlled access to technology and procurement decisions. Today, SMBs blend their buying paths based on their specific needs. They consider product complexity, timelines and the level of internal expertise available. Few rely on a single route; most toggle between partners, platforms and advisors depending on the situation.

The future of SMB purchasing in Europe will be defined by this hybrid approach. It favours convenience and control without sacrificing the expert guidance needed to make smart, confident decisions.

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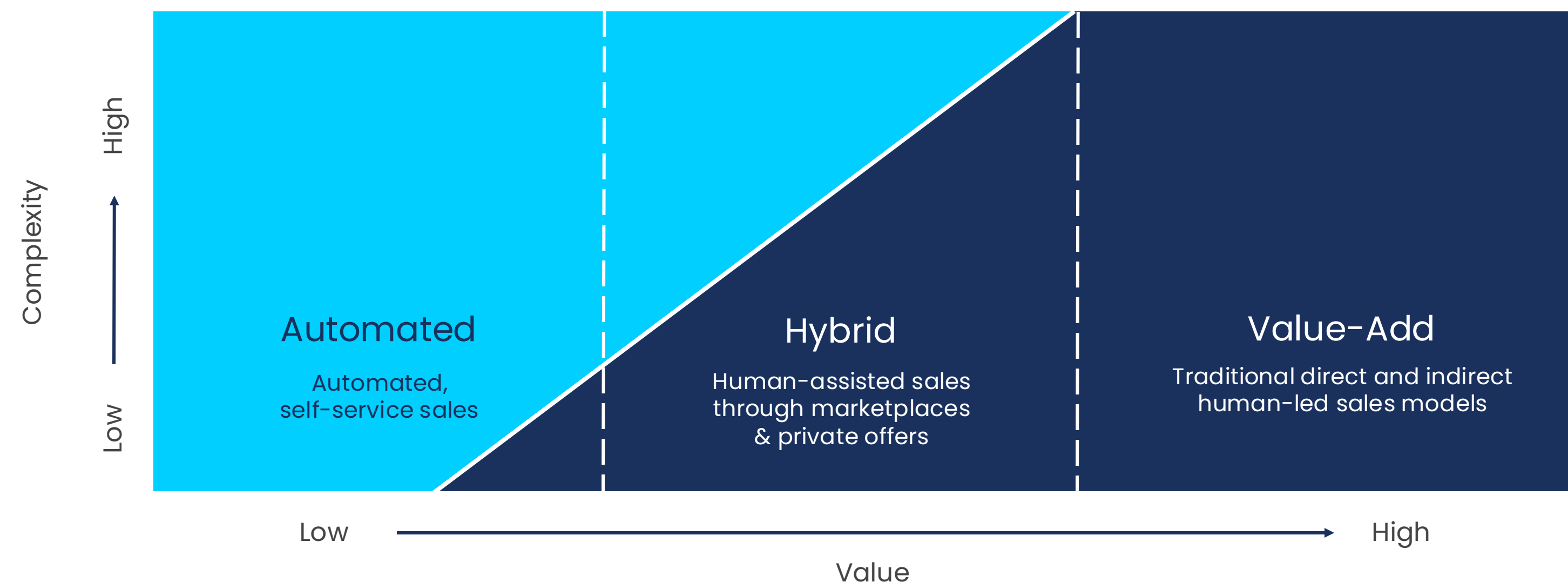
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SMBs want purchasing options that combine self-service with expert support. Many prefer MSPs that offer both e-commerce portals and managed services, allowing them to complete simple transactions independently while relying on experts for more complex needs. This hybrid model is a growing competitive advantage for providers.

Marketplaces work well for low-complexity purchases like hardware, standard software and routine services. Automation delivers the speed and convenience SMBs expect, especially for repeatable, clearly defined transactions that don't require assistance.

As complexity and value increase, human involvement becomes essential. Advanced solutions and integrated deployments need consultative sales, technical expertise and project oversight. Providers should align engagement models to these needs. They should automate where possible and guide buyers through more intricate decisions to maximise support and value.

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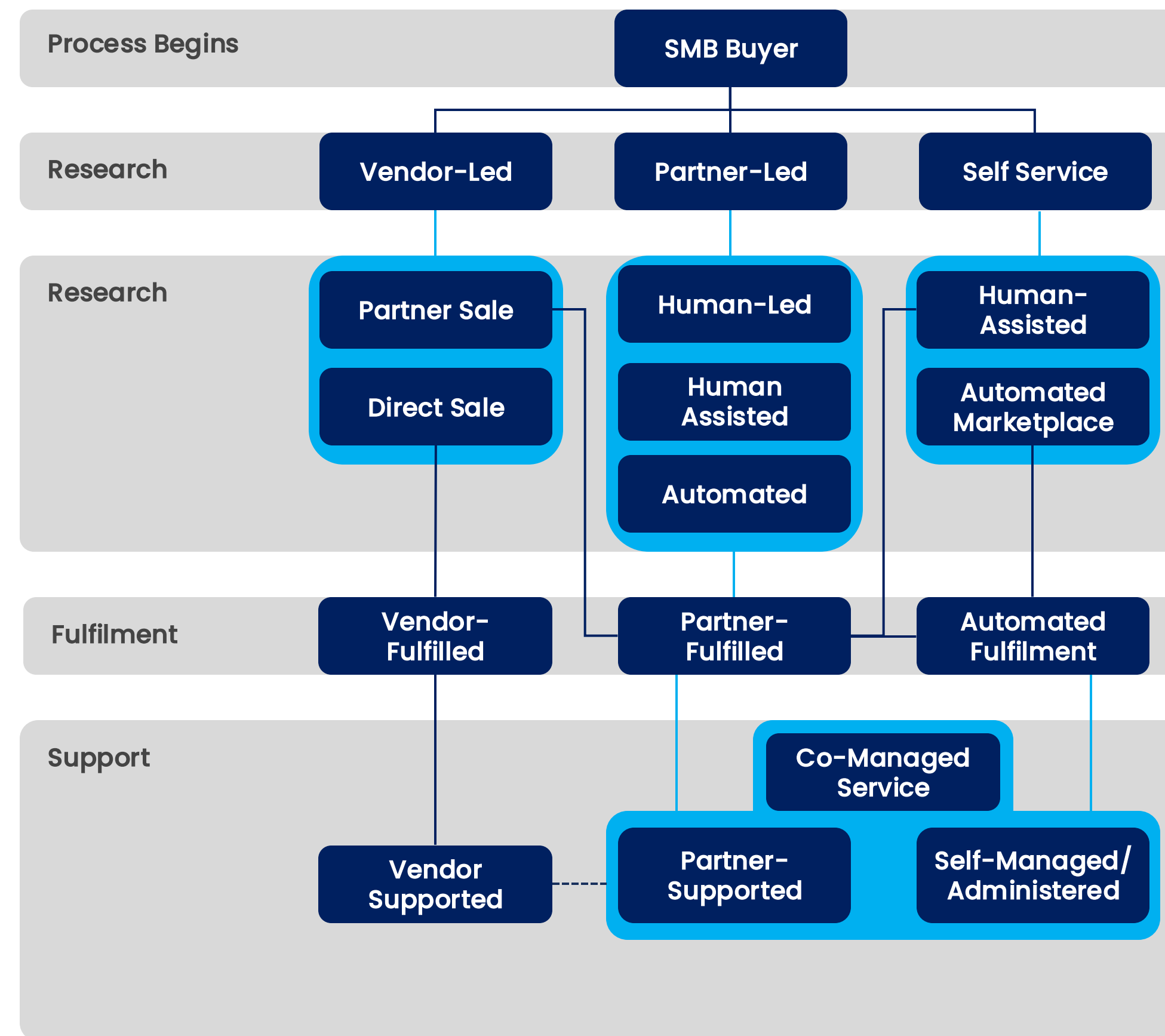
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SMB Pathways for Purchasing Products & Services



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.

To support these models, MSPs should:

- Provide self-service resources covering use cases, product capabilities and services.
- Offer multiple purchasing options, from self-service to expert-led engagement.
- Ensure support is available across the entire buyer journey, including post-sale.
- Enable add-on purchases of services and support, regardless of the original sales channel.
- Focus on delivering high-quality, value-added services that improve outcomes.

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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 organisation 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-completed questionnaire with aided response options. The results carry a margin of error of +/-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.

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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. Our innovative analysts leverage data to develop customised route-to-market strategies for any client that wants to translate vision into value.

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About Pax8

Pax8 connects partners, vendors and SMBs through AI-powered insights and comprehensive product support. With a global ecosystem of 40,000+ managed service providers, Pax8 empowers businesses to grow securely by provisioning, deploying and optimising agent-ready solutions. Its modern cloud marketplace simplifies procurement and consumption-based billing, while expanding into the Managed Intelligence Provider (MIP) space to enable partners to deliver intelligence-driven services that unlock the full potential of the agentic future.

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Together, we are empowering small and
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