THE AUSTRALIAN TECH BUYER 2026

A Study by Singularity *Research* | CURIOUS INSIGHTS | in association with 101connects



AI creates the shortlist. Humans still choose the winner.

A Singularity Research and Curious Insights Study.

Based on 151 Australian enterprise technology buyers and purchase influencers, fieldwork Q3 2026.

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Executive Summary

When was the last time you sat in a pipeline review and heard someone explain why a deal you should have been in never appeared? I have heard a lot of theories about that over the past two years. Most of them are about budget, or timing, or procurement. This research suggests a different answer.

KEY NUMBERS AT A GLANCE:

95%
of Australian organisations are using AI in the vendor evaluation process

46%
would discount a vendor missing from AI answers.

46.7
The 2026 Australian AI Buying Journey Index score out of 100.

We surveyed 151 Australian enterprise technology buyers about one specific, recent purchase each of them had been involved in. Of those 151, 95% used an AI assistant somewhere in that evaluation. Just under two-thirds used one several times or extensively. More than half used AI to help build the initial vendor longlist. Eight people in the whole sample said they never use AI for technology research.

Then we asked the same people what influenced the final vendor selection. AI output came twelfth out of fourteen options, named in the top three by 13%. Two people out of 151 ranked it first. Product demonstrations came first at 46%, proofs of concept second at 38%, and price third at 33%.

This isn't a contradiction – it's what happens when a technology stops being an adviser and becomes plumbing. Nobody credits Google with choosing their vendor either. AI is doing the work that used to happen in the first fortnight or few months of an evaluation, and it is doing it before you know the evaluation exists.

The commercial consequence is blunt. We asked what would happen if a buyer queried an AI assistant and a vendor they already knew was not in the results. Only 12% said it would make no difference.

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Nearly half (46%) said they would be less likely to consider that vendor, and 8% would rule it out entirely.

One finding surprised me enough that I went back and re-ran it. The buyers using AI most heavily are the ones MOST open to human contact. Heavy AI users are receptive to an introduction from an independent analyst at 86%, against 64% for lighter users. For a personalised message about an active project it is 73% against 46%. They also check what the AI tells them more often, not less.

In fact, many buyers want the vendor to contact them earlier in the process. 40% were contacted later than they would have liked, 30% at about the point they wanted, and 30% earlier than they wanted. The challenge is working out where you sit with each individual buyer!

And the thing in decline is not the buying journey - it is your own channels. Reliance on direct contact from vendor sales teams is down 58 points on a net basis over twelve months, and on vendor websites and vendor content by 36 points. Over the same period reliance on independent analyst research is up 36 points, peers up 47, Australian research and benchmark data up 57, and industry events and roundtables up 38.

Many buyers want **MORE** vendor engagement.

40%

were contacted later than they would have liked

30%

at about the point they wanted

30%

earlier than they wanted

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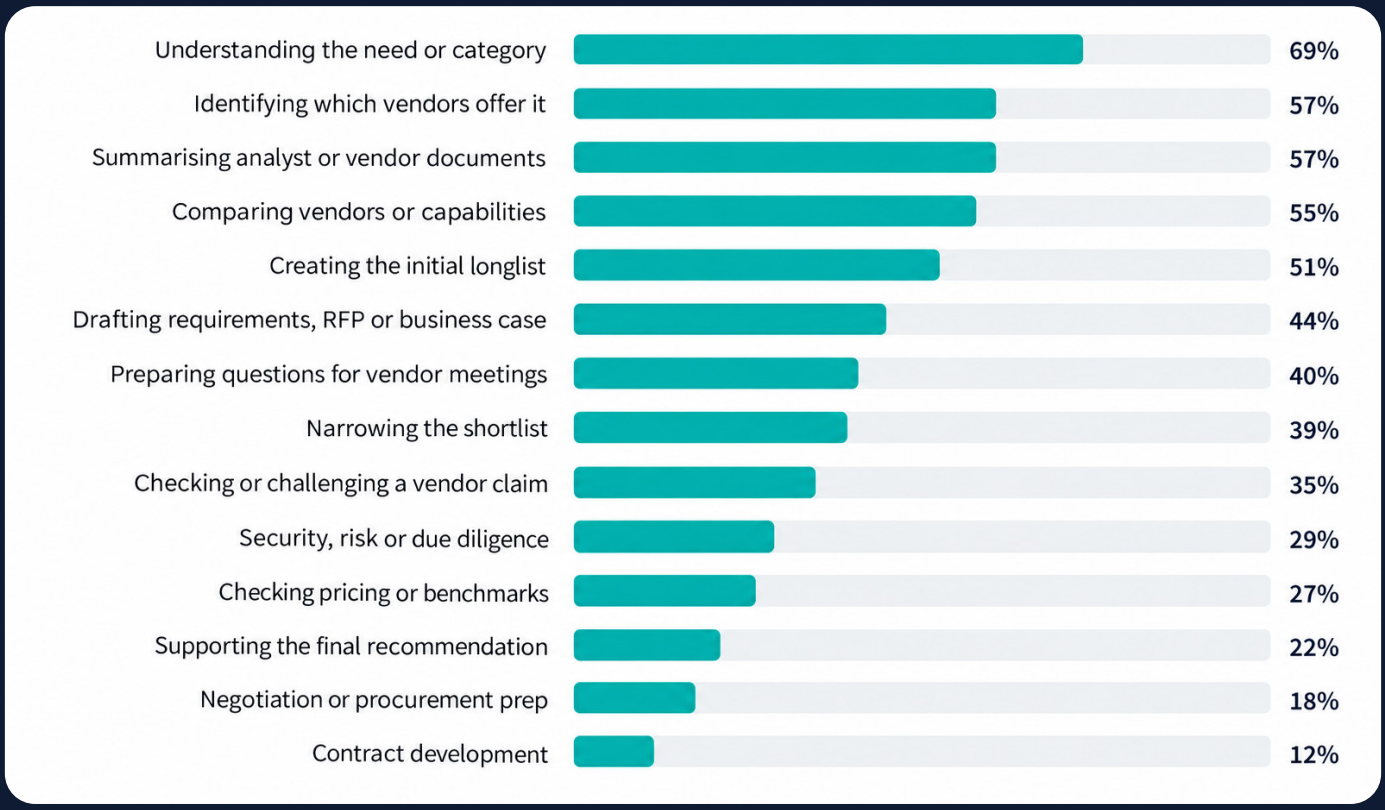
AI has taken over the first fortnight of the evaluation

I expected AI adoption among Australian tech buyers to be high. I did not expect it to be close to universal.

What buyers use it for is the useful part. The most common application is understanding the business need or the technology category itself, at 69% of AI users. Then identifying which vendors offer the capability (57%), summarising analyst reports and vendor documents (57%), comparing vendors and capabilities (55%), and creating the initial longlist (51%). Usage falls away as the purchase progresses. Only 22% used AI to support the final recommendation, 18% in negotiation or procurement prep and 12% in contract development.

> AI is concentrated in the part of the journey where a buyer is working out what exists and who to take seriously, which happens to be the part where tech vendors have almost no visibility.

FIGURE 1: Where AI enters the buying journey (% of AI users)



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

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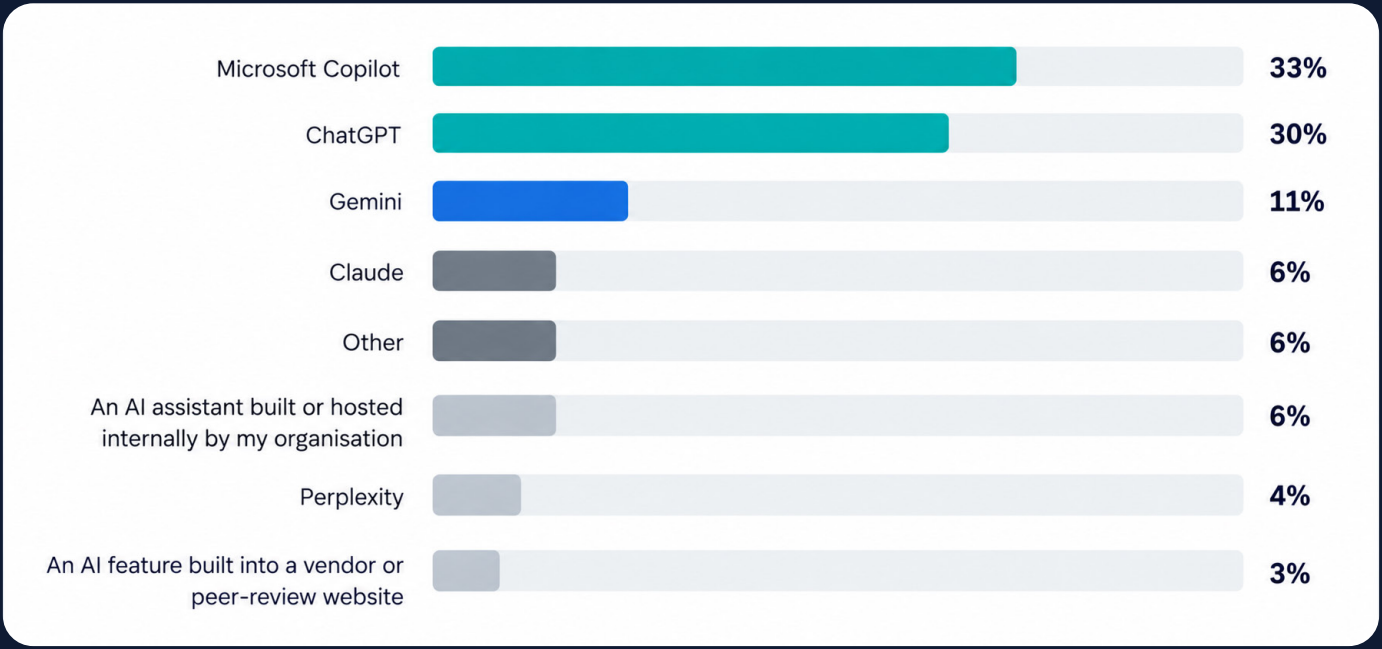
FIGURE 2: Copilot and ChatGPT are the AI Assistants of Choice (% of AI users)



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

On longlist construction specifically, AI sits second. General web search was used by 61% of buyers to build their initial longlist, AI assistants by 58%, analyst reports and analyst websites by 45%, a peer at another organisation by 40% and a consultant or systems integrator by 34%.

I want to be careful about one popular claim - AI is not yet the dominant starting point for discovery. When we asked how buyers FIRST became aware of the vendors available to them, general web search came in at 17% and AI assistants at 15%. At this sample size that is a gap of two people, which is no gap at all. Anyone telling you that AI is now the number one front door for Australian tech buying is ahead of the evidence. What AI has taken over is everything that happens in the fortnight after that first awareness.

On which assistant, Microsoft Copilot leads narrowly among buyers who nominated a primary tool (33%), with ChatGPT at 30%, Gemini at 11% and Claude at 6%. In an Australian enterprise context, I suspect this says more about what is already licensed and sitting in the productivity suite than about model quality.

When asked how buyers FIRST became aware of the vendors available to them

17%

General web search first made buyers aware of vendors

VS

15%

AI assistants first made buyers aware of vendors

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The AI Buying Journey Index

"Do you use AI" stopped being a useful question once the answer became yes for almost everybody. What separates buyers now is how far into the decision AI reaches. Our Index scores every respondent from 0 to 100 on five things:

1. How often they use AI for technology research
2. How intensively they used it in the purchase we asked about
3. How many stages of that purchase it touched
4. Whether it changed what they did
5. How much weight they put on a vendor appearing in AI output at all

Most buyers let AI do the groundwork. One in six let it shape the shortlist.

46.7
average Index score out of 100

THREE TIERS OF BUYER



AI-light 24%
INDEX SCORE 0 TO 39

AI sits on the margins of the purchase, or is not used at all.

AI changed which vendors were in contention for **19%** of this group.

AI-assisted 59%
INDEX SCORE 40 TO 59

AI does the groundwork. People still steer the decision.

AI changed which vendors were in contention for **48%** of this group.

AI-led 17%
INDEX SCORE 60 TO 100

AI is used heavily throughout and shapes who makes the shortlist.

AI changed which vendors were in contention for **88%** of this group.

SHARE OF BUYERS WHO ARE AI-LED

36% Services and media **vs** **7%** Public sector

"Changed which vendors were in contention" = AI caused the buyer to add a vendor they would not otherwise have considered, or rule one out.

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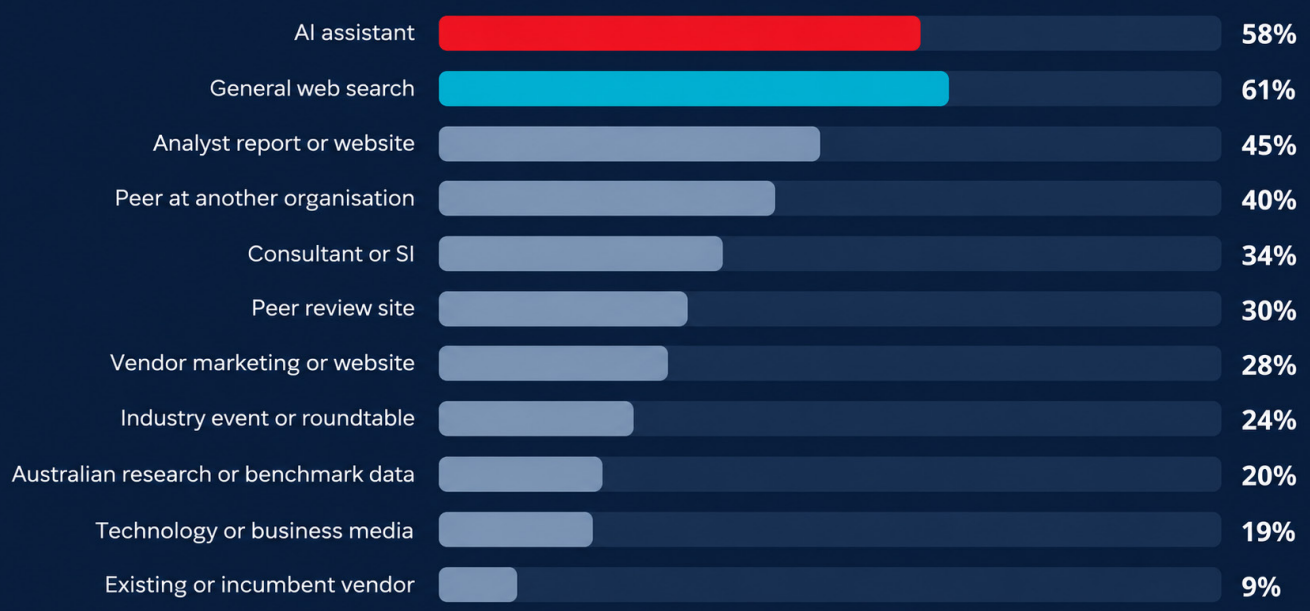
AI materially changes perspectives of vendor capabilities

FIGURE 3: AI's role in longlisting – how the longlist was built



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

Using a tool is not the same as being influenced by it, so we asked buyers what the information from an AI assistant had actually caused them to do during the purchase.

48%
said AI changed their view of a vendor's capability or suitability.

40%
changed their requirements, evaluation criteria or the questions they put to vendors.

36%
added a vendor to their longlist or shortlist that they would not otherwise have considered.

31%
changed what they expected the solution to cost.

25%
ruled out a vendor they had been considering.

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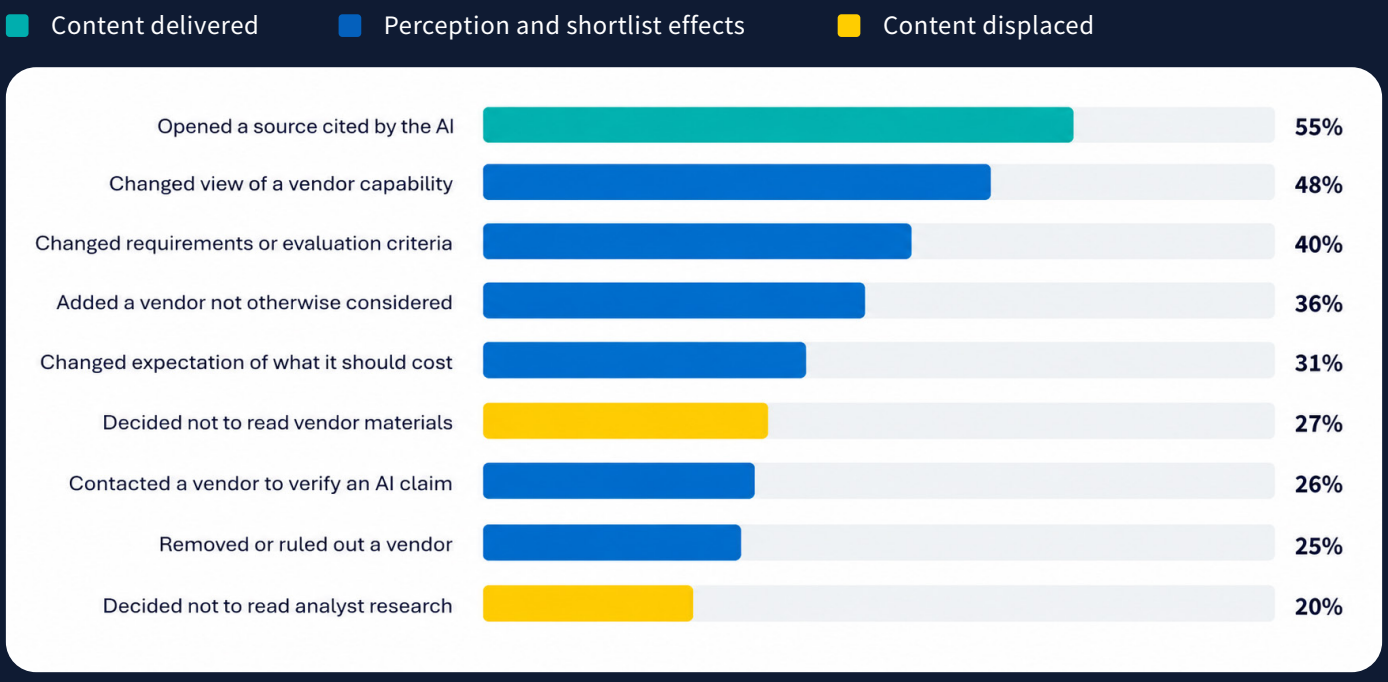
AI giveth and AI taketh away...

There is a content displacement effect too. Just over a quarter (27%) decided not to read a vendor's own materials because the AI had summarised them, and 20% skipped an analyst report for the same reason.

The number that gets less attention is more encouraging for anyone who produces research. More than half of AI users (55%) opened or read a source that the AI cited or linked to. We call this ***"The Citation Dividend"***. AI is not only summarising your content away from you. It is also sending traffic to whatever it decides is worth citing, which is a different game with different rules.

AI takes some buyers away and delivers others, and the deciding variable is whether your content is citable.

FIGURE 4: What AI caused buyers to do.



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

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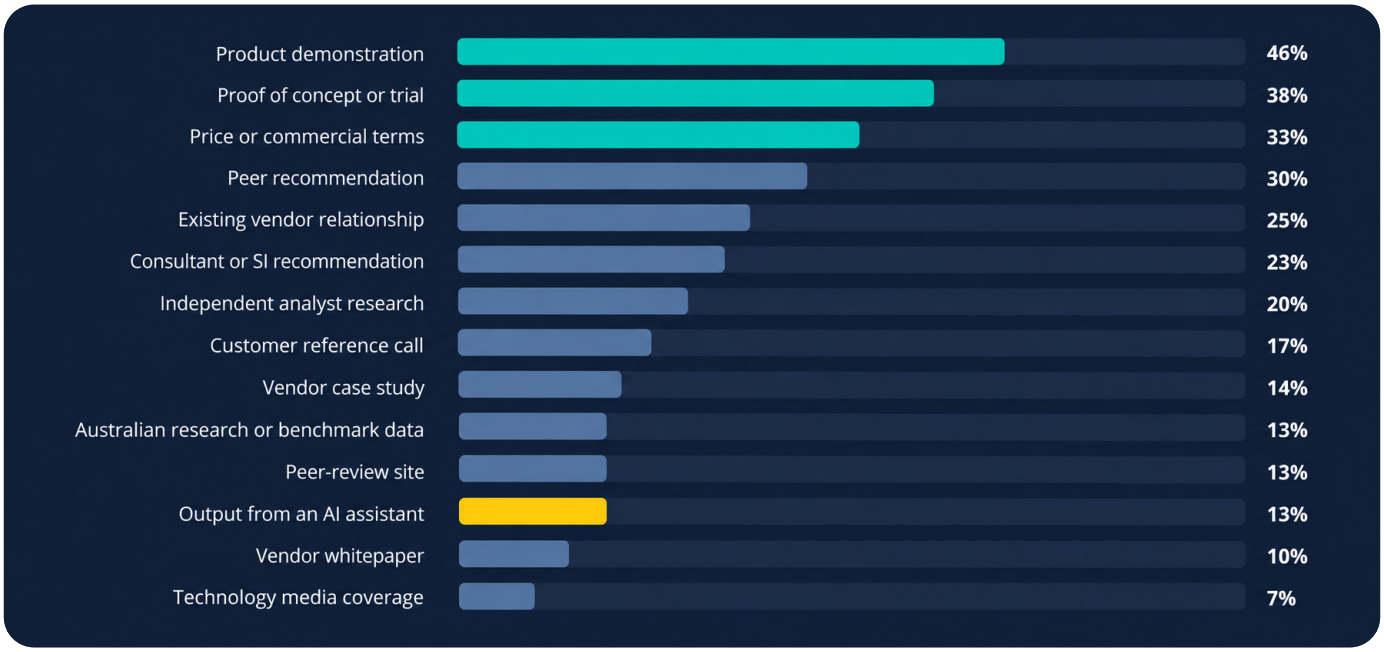
Humans still make the final decision using traditional metrics

Now put that alongside what buyers said determined the final selection. We asked them to rank their top three from fourteen options. Product demonstrations came first at 46%, then a proof of concept or trial (38%), price or commercial terms (33%), a peer recommendation (30%), an existing relationship with the vendor (25%) and a consultant or SI recommendation (23%). Output from an AI assistant came twelfth at 13%.

So the thing reshaping who gets considered barely features in how the winner is chosen. I do not read that as buyers underrating AI, and I do not think it is embarrassment about admitting they used a chatbot. I think it is a fair description of what the tool does. AI decides who is in the room. The demo, the proof of concept and the commercial negotiation still decide who walks out with the contract.

That split tells you where your problem is. If you are losing at the demo, you have a product or a sales execution problem and this research will not help you. If you are not getting to the demo at all, you may have a visibility problem that did not exist three years ago.

FIGURE 5: AI's role in shortlisting – influencers in final vendor selection



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

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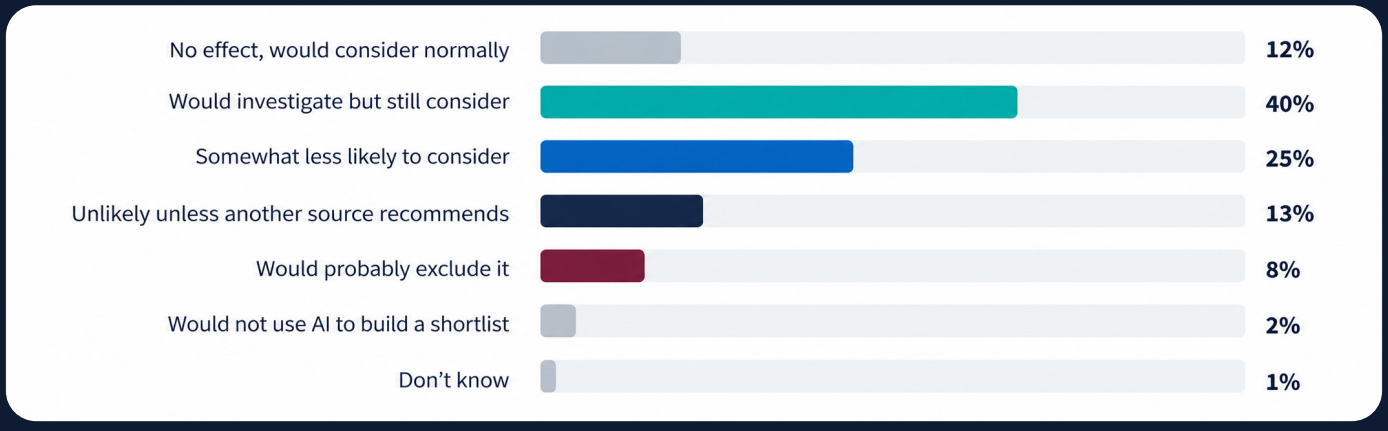
The cost of being invisible

We put a hypothetical to every buyer in the sample. Suppose you asked an AI assistant to recommend vendors for a requirement, and a vendor you already knew was not included. What would that do to your willingness to consider them?

Only 12% said it would have no effect. Another 40% said they would investigate why the vendor was missing but would still consider it. Everyone else moves against you. A quarter (25%) would be somewhat less likely to consider that vendor, 13% would be unlikely to consider it unless a trusted source recommended it separately, and 8% would probably exclude it outright.

> It is worth noting that this is a stated response to a hypothetical, not observed behaviour. But the direction is not in doubt, and the effect is large enough that measurement error is not the story.

FIGURE 6: What happens when an AI assistant leaves a vendor out.



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

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40%

would investigate why the vendor was missing and still consider them

The 40% who would investigate is the group I find most interesting, because it is the one you can do something about! These buyers are not writing you off - they are going to go and check your website, a peer review site, whatever analyst coverage exists, or have a conversation with someone in their network or with a partner. Missing from the AI answer is recoverable if the next thing they find is solid. It is not recoverable if the next thing they find is a product page written in 2023 or a partner representative who is not up to speed on your latest and greatest capabilities.

29%
helpful if an AI assistant cited or linked to it

22%
recommended by a peer

17%
named customer evidence

15%
written by an independent analyst

This is also where content strategy meets visibility - when we asked what would make buyers more likely to engage with a vendor's research or thought leadership, 29% said it would help if an AI assistant cited or linked to it. That is a higher share than named customer evidence (17%), being recommended by a peer (22%), or being written by an independent analyst (15%). Buyers have worked out which sources their assistants trust, and they are treating that as a signal in its own right.

WORTH A DEEPER LOOK:

Buyers whose primary tool is Microsoft Copilot used AI to build their longlist 74% of the time, against 47% for buyers whose primary tool is ChatGPT. They were also more than three times as likely to contact a vendor to verify or challenge something the AI had told them (38% against 12%) and this data is statistically significant. These factors are worth teasing out. ***If you'd like a deeper conversation on the use of different AI models and assistants, please reach out – our contact details are at the end of the paper.***

74% vs 47%
used AI to build their longlist: Copilot vs ChatGPT primary users

38% vs 12%
contacted a vendor to verify or challenge what the AI told them

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The buyers using AI the most want to talk to you the most

Going into this study I assumed we would find a straight substitution effect. Buyers leaning hardest on AI would need people less - they would run the evaluation themselves and treat vendor contact as an interruption. Every vendor marketing team I have spoken with in the past year believes some version of this, and a few have even restructured their demand generation around it.

But the data does not support it!

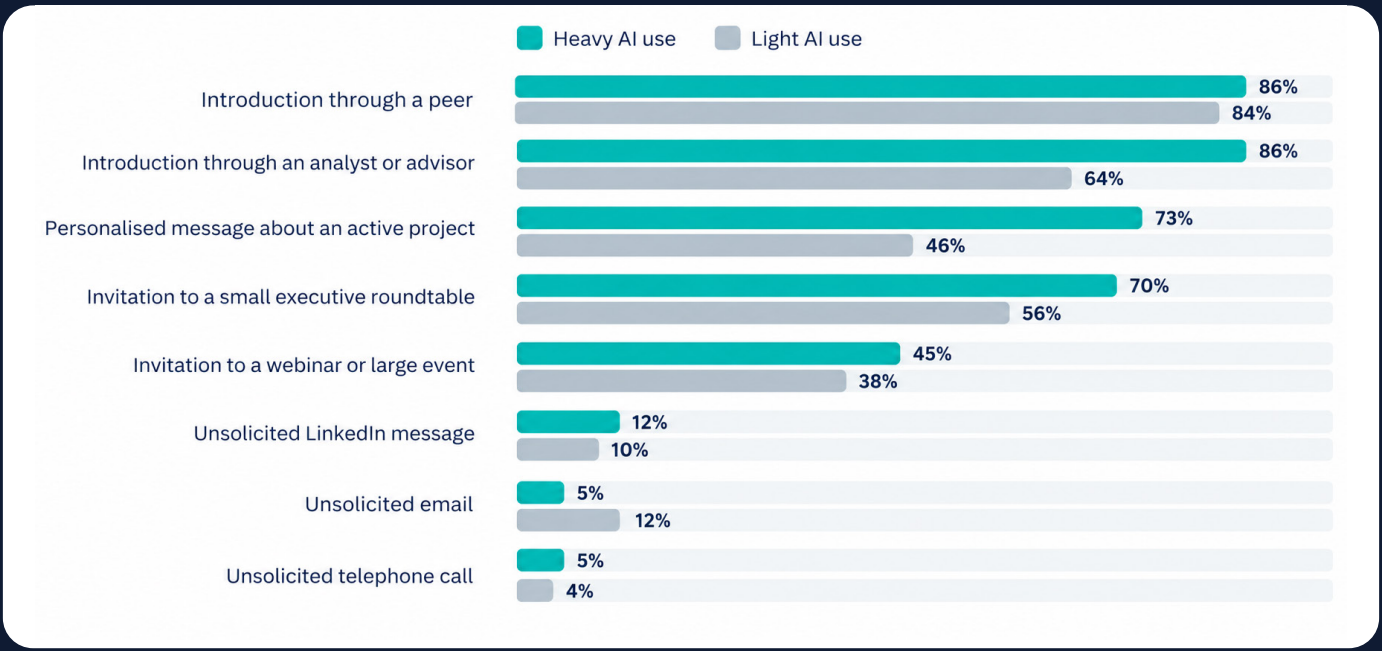
We split the sample into buyers who used AI heavily in their purchase (several times or extensively, n=93) and buyers who used it lightly (once or twice, n=50), then looked at how receptive each group was to eight different ways a vendor might approach them.

> So this is not heavy AI users wanting more of everything. It is quite specific. The two things that separate them are an introduction from a credible independent party, and an approach that shows you already understand what they are working on.

A peer introduction is the most welcome approach for everyone at 86% and 84%, and heavy AI use makes no difference to it. We also found no difference in how much of the evaluation they complete before talking to a vendor.



FIGURE 7: Receptivity to vendor approaches, heavy against light AI users.



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

WHAT MOVED

On two of the eight the difference is large and statistically significant:

- An introduction through an independent analyst or advisor runs at 86% among heavy AI users against 64% among light users.
- A personalised message that clearly relates to an active project or requirement runs at 73% against 46%.
- An invitation to a small executive roundtable sits at 70% against 56%.

WHAT DID NOT

The results that did NOT move matter just as much. Cold approaches are dead for both groups.

- Unsolicited phone sits at 5% and 4%
- Unsolicited email at 5% and 12%
- Unsolicited LinkedIn at 12% and 10%.

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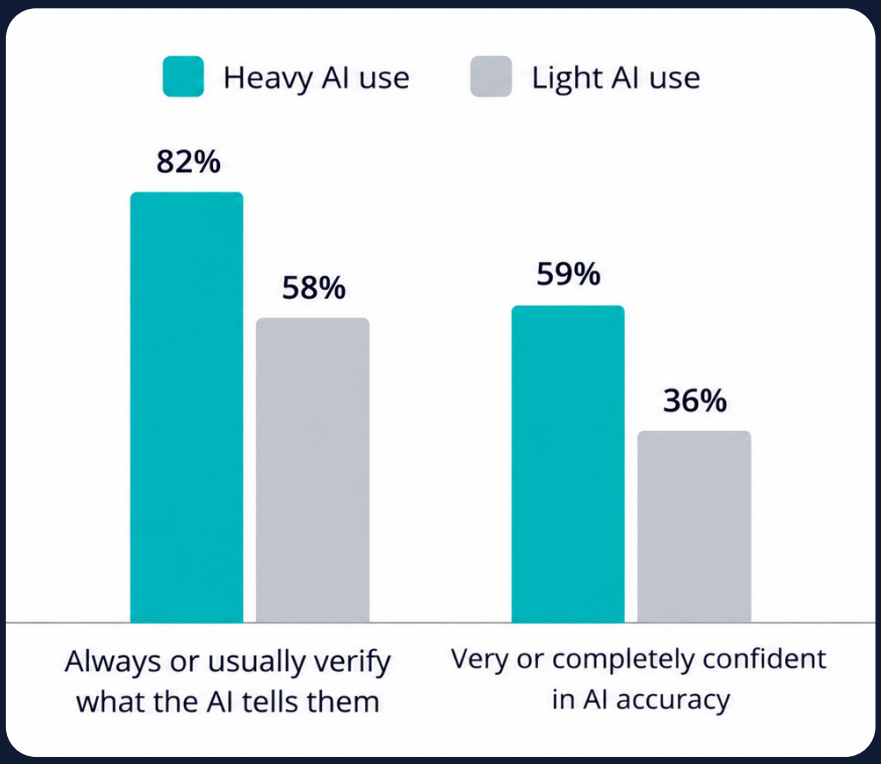
FIGURE 8: Verification and confidence with AI outputs.



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

The verification data points the same way - heavy AI users say they always or usually check what an AI assistant tells them 82% of the time, against 58% for lighter users, and they are also more confident in AI accuracy (59% very or completely confident, against 36%). Those two sit together more comfortably than they first look. These are people who use the tool a lot, know what it is good and bad at, and have built a checking habit around it.

My reading is that AI has taken over the part of the journey that was always low value to the buyer and low margin for you. Working out who exists, what the category looks like, roughly what things cost. It has not touched the part buyers still find hard, which is working out whether a vendor is credible and whether the thing will work in their environment. If anything, doing more machine research makes that second problem bigger, because the buyer arrives with a longer list of specific claims that need checking. That is what an analyst introduction and a well-targeted approach are being used for.

> ***One caveat for the record.*** This is a single survey at a single point in time, so I cannot tell you that heavy AI use CAUSES higher receptivity to human contact. It is possible that buyers more engaged in a purchase simply do more of everything, including using AI and taking meetings. Sorting that out needs a bigger sample or a repeat wave.

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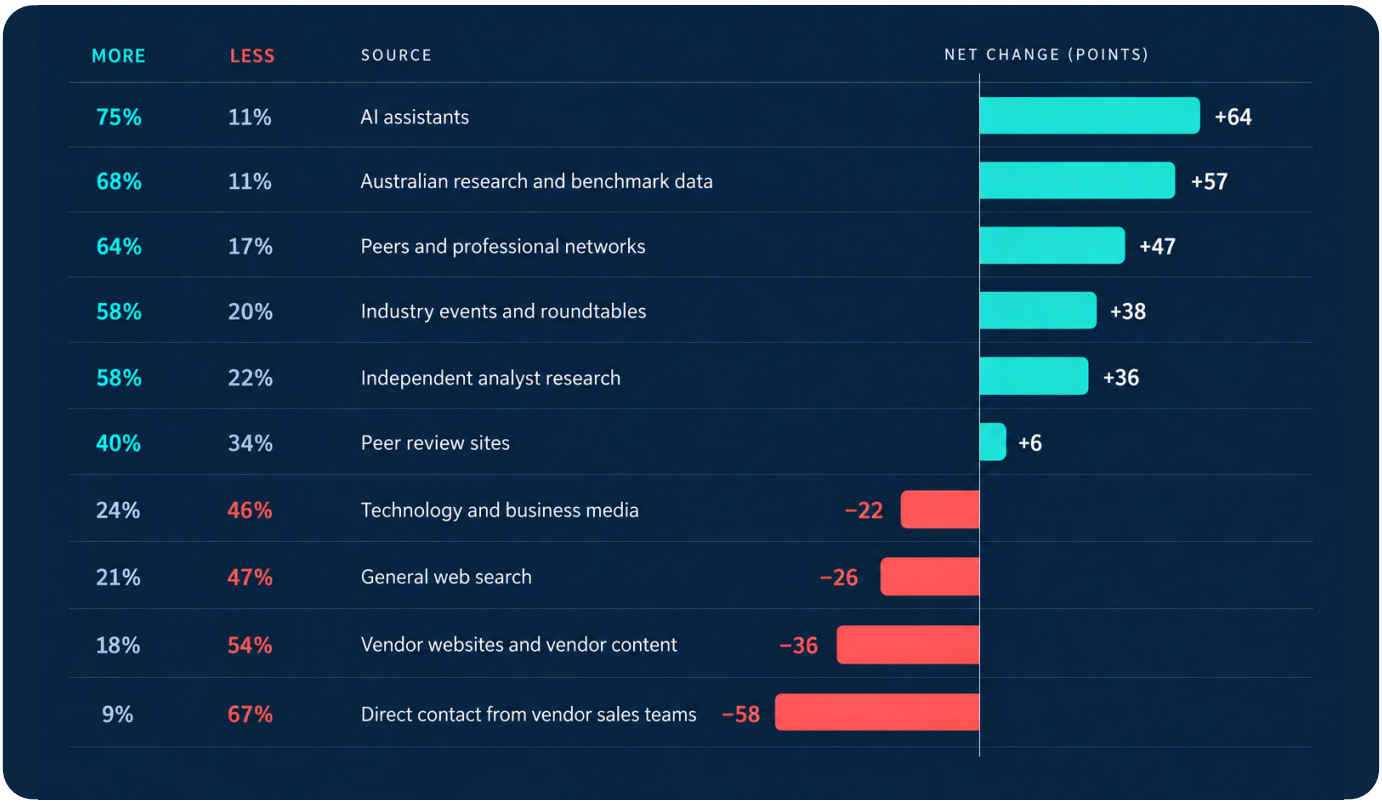
What is declining is yours, not theirs

We asked buyers how their reliance on ten different information sources had changed compared with twelve months ago.

FIGURE 9: Net change in reliance over the past twelve months



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

Two things in that table are worth pulling out.

1 **Industry events and roundtables are up!** Nearly six in ten buyers say they rely on them more than they did a year ago. I have lost count of the vendor marketing plans I have seen in the past two years that cut event spend on the assumption that events were finished. That assumption is not supported here.

2 **General web search is falling almost as fast as vendor content.** If you have built a demand engine on SEO, the traffic you are losing is not going to a competitor's blog. It is going into a chat window.

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FIGURE 10: Who buyers trust (Mean rank: 1=most trusted)



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

44%

of buyers put AI output in their top three trusted sources

The trust data lines up. We asked buyers to rank eight sources from most to least trusted. Peers at other organisations came first with a mean rank of 3.6, independent industry analysts second at 3.8, and output from AI assistants third at 4.1, ahead of consultants and systems integrators (4.4), peer review sites (4.7), vendor content (4.8), vendor sales representatives (5.1) and technology media (5.5). Forty-four per cent of buyers put AI output in their top three trusted sources.

> ***Don't over-analyse this data*** - the spread between first and last is narrower than you would expect, which suggests some respondents did not discriminate much across eight items. The clusters are the story. People and independents at the top, vendor-owned at the bottom, media last.

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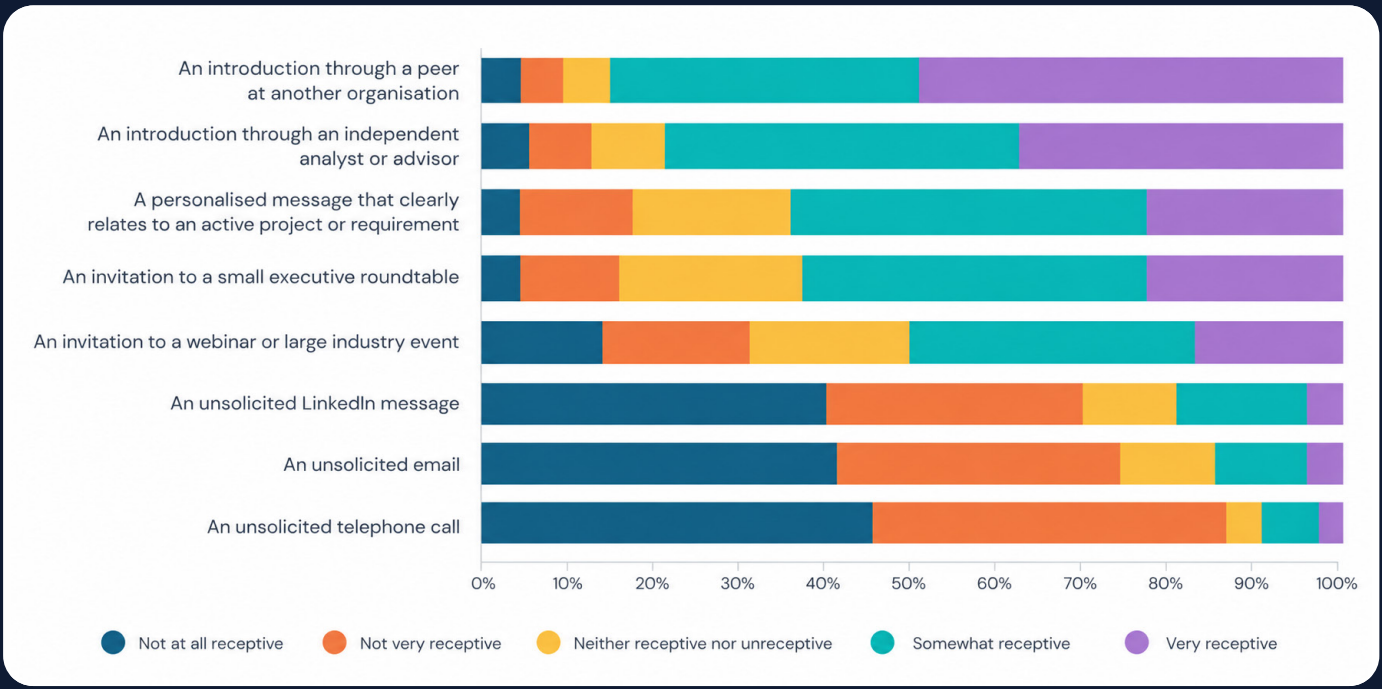
FIGURE 11: Context matters for outreach



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

The outreach numbers finish the picture. Across the whole sample, 90% of buyers are unreceptive to an unsolicited phone call and 5% are receptive. Unsolicited email runs at 79% unreceptive against 7% receptive. LinkedIn is marginally better at 72% against 11%. Compare that with an introduction through a peer (86% receptive), an introduction through an independent analyst or advisor (79%), a personalised message about an active project (64%) and an invitation to a small executive roundtable (63%).

Your channels are not the problem - your permission to use them is.

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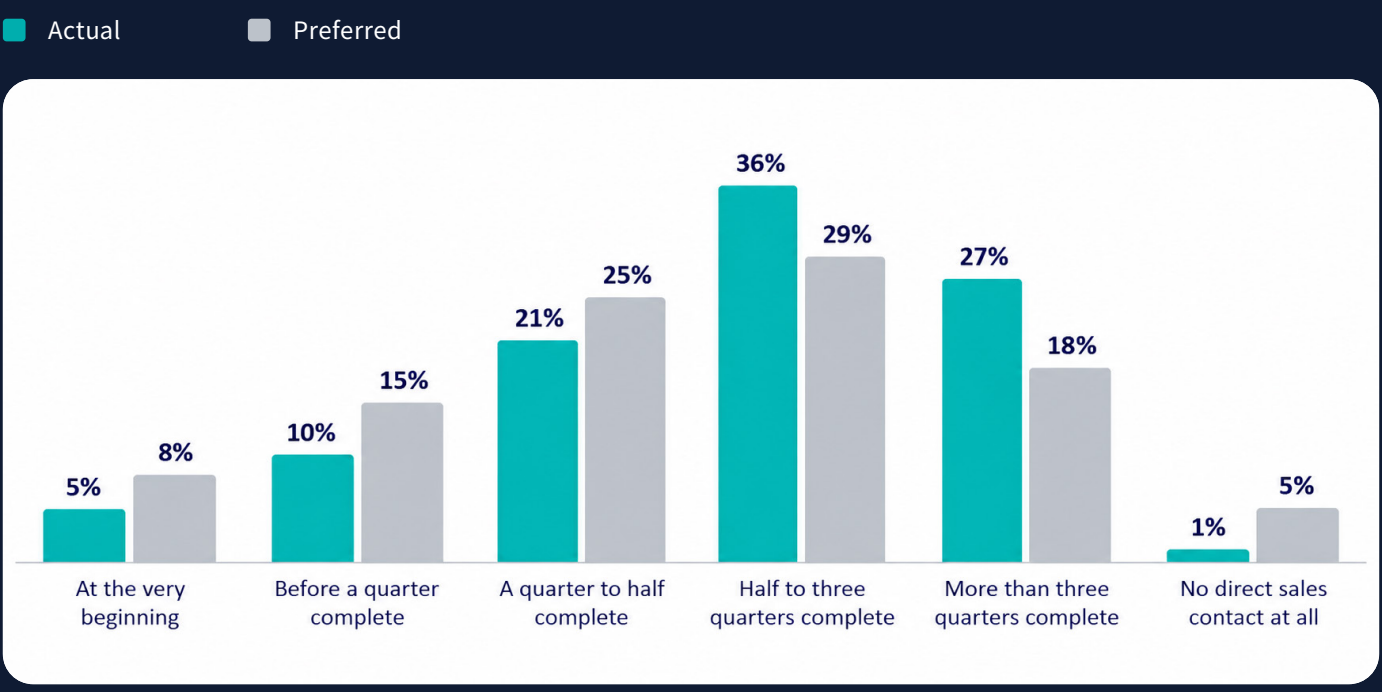
The engagement gap is not what you have been told

CEB and Google found in 2012 that the average buyer was 57% through the purchase decision before engaging a sales rep. It has been restated upwards ever since towards 70%, and Gartner's current version is that buyers spend only 17% of their purchase time meeting suppliers at all. The received reading of this is that buyers want sellers out of the way for as long as possible. That is the part our data does not support - we tested it, and the answer is messier than the line suggests.

On the raw numbers the broad claim holds. Some 64% of buyers completed at least half their evaluation before any direct contact with a vendor's sales team, and 27% got past the three-quarter mark.

But we also asked where they would ideally prefer to start that conversation, and only 52% chose the halfway point or later. Compare the two and buyers appear to want vendors in EARLIER than they are getting them, which is the opposite of the usual story.

FIGURE 12: Actual against preferred point of first sales contact.



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

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FIGURE 12-B: Respondent-level view: actual against preferred timing of first contact

40%	30%	30%
were contacted later than they would have liked	at about the point they wanted	earlier than they wanted

Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

Because we have respondent-level data we can do better than comparing averages. Looking at each buyer individually, 40% were contacted later than they would have liked, 30% at about the point they wanted, and 30% earlier than they wanted.

> That is a plurality, not a landslide. The honest conclusion is that there is no single right moment. A real minority of buyers feels pushed, and a slightly larger group is sitting there wishing someone would call. Any vendor policy built on one number, including the 70% figure, will be wrong for roughly two-thirds of the market.



Mid-market buyers run a longlist of three. Enterprise buyers run six.

One of the most actionable outcomes in this study has nothing to do with AI! Among organisations of 500 to 999 employees, 64% built a longlist of three vendors or fewer. At 1,000-plus employees, only 10% did, and half ran six or more. The pattern repeats on deal size: 64% ran three or fewer under $250,000, against 11% at $1 million or more.

Notably, none of this is explained by AI. Once you account for organisation size, heavier AI use shows no relationship with longlist length in either direction. Whatever AI is doing to the buying journey, compressing the vendor set is not it.

LONGLIST OF THREE VENDORS OR FEWER

64% of organisations with 500–999 employees

vs

10% of organisations with 1,000+ employees

64% of purchases under $250,000

vs

11% of purchases of $1 million or more

50% of 1,000+ employee organisations ran six or more vendors on the longlist

If you'd like a deeper conversation on the longlists and shortlists, please reach out – our contact details are at the end of the paper.

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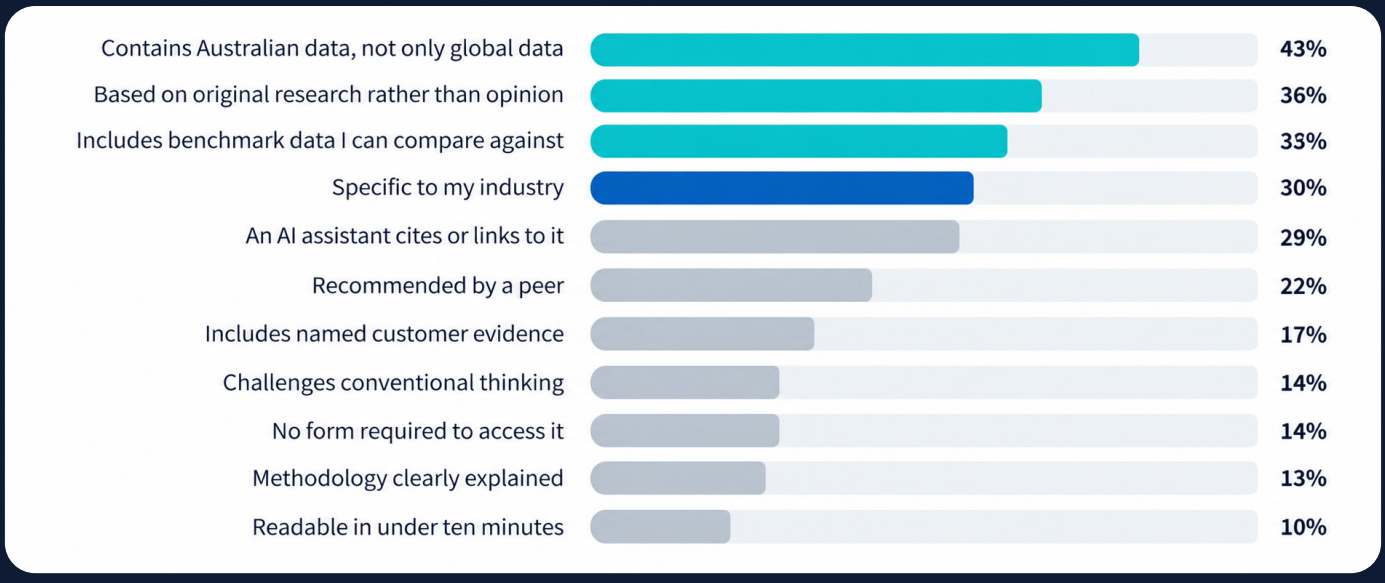
Six things you should be doing differently

1 **The first is to go and find out what the assistants say about you.** Not once, and not from your own logged-in account, because that will flatter you. Across the four or five tools your buyers use, in the phrasing they use, in an Australian context. Nearly half the market discounts a vendor that does not appear. Many vendors I speak with have never checked.

2 **The second is to write to be cited rather than to be gated.** Australian data is the strongest driver of content engagement in this study at 43%, followed by original research rather than opinion (36%) and benchmark data buyers can compare themselves against (33%). Being cited by an AI assistant came in at 29%. Content behind a form cannot be cited, cannot be summarised and cannot be found. The lead you capture today costs you the mention tomorrow.

FIGURE 13: What makes buyers engage with vendor research and thought leadership



Source: Singularity Research and Curious Insights, The Australian Tech Buyer 2026.

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3 **The third is to localise properly.** The appetite for Australian-specific data is the clearest and cheapest advantage available in this market and it is largely unclaimed. Global research with an ANZ slide bolted on the end is not what buyers are asking for.

4 **The fourth is to move budget out of volume outbound and into introductions.** The cold channels sit at 5%, 7% and 11% receptivity. Peer and analyst introductions sit at 86% and 79%, executive roundtables at 63%. No amount of sequence optimisation closes a gap that size. It is a question of who makes the approach, not how the approach is worded.

5 **The fifth is to protect the demo and the proof of concept – in the services world this might look like workshops and references.** They are still the two things that decide the deal, at 46% and 38%. Everything above is about earning the right to run one.

6 **The sixth is to stop planning from assumptions and start asking.** Look at how far things moved in a single year in this study. Reliance on AI assistants is up 64 points on a net basis, and on direct contact from vendor sales teams it is down 58. A go-to-market plan built on what Australian buyers did in 2025 is describing a market that has already gone. I include myself in that. I went into this study expecting to find that heavy AI users wanted less contact with people, and the data said the opposite. The received wisdom in this industry is wrong more often than it is right, and the only reliable way to work out which parts are wrong in your category is to ask your buyers.

There is a second return on that spend - the three things most likely to make an Australian buyer engage with your content are **Australian data, original research rather than opinion, and benchmark data they can measure themselves against.** All three describe a survey you commissioned. Research is the only content investment that pays twice, once in what you learn and once in the asset it produces, and that asset happens to be the one buyers rank above everything else you could publish! It is also the kind of content an assistant is most likely to cite, which is the visibility problem solved from the other direction.

We run this work with technology vendors across the Australian market, from single-category buyer studies to syndicated research with question slots. Contact details are at the end.

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About the research and future opportunities

The fieldwork for this study was conducted by Curious Insights in Q3 2026 among 151 Australian enterprise technology buyers and purchase influencers, all of whom had been involved in technology purchasing decisions in the previous 18 months. Organisations were 500 employees or more, with 52% at 1,000 or more. Roles ran from CIO, CTO and CISO through IT Director and Head of Digital to procurement and line-of-business budget holders, with 76% at director level or above. Every respondent answered in relation to one specific, recent technology purchase.

151
Australian enterprise technology buyers and purchase influencers

500+
employees at every organisation; 52% at 1,000+ employees

76%
at director level or above

Q3 2026
fieldwork period

The research was designed and analysed by Singularity Research, which retains editorial control over findings, framing and conclusions.

DESIGNED AND ANALYSED BY

FIELDWORK BY

IN ASSOCIATION WITH

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Find out more

The full dataset holds a good deal we have not published here: results by organisation size, role seniority, decision authority, contract value, purchase type, AI intensity, primary AI assistant and technology category. If you are interested in deeper dives, please contact us about Wave Two, where we will scale the sample so that industry and category analysis stands up properly, and there are question slots available to research partners who want to shape it.



If you want to talk through what the data says about your category, or have me present it to your sales and marketing teams, get in touch:

Tim Sheedy, Singularity Research
timsheedy@singularityresearch.io



The survey behind this report was designed, fielded and quality-checked by Curious Insights, a specialist in B2B technology surveys with delivery across India, the US, Europe and ANZ. If your firm needs a B2B survey designed, fielded and quality-checked, contact:

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If you would like to follow through on some of the best-practice recommendations from this report, 121connects-ANZ helps technology vendors deliver a professional end-to-end Executive Roundtable experience to ensure your sales conversations are on point and being delivered at the right time for your current and prospective customers. To know more, reach out to:

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THE AUSTRALIAN TECH BUYER 2026

AI creates the shortlist. Humans still choose the winner.

A Singularity Research and Curious Insights Study.

Based on 151 Australian enterprise technology buyers and purchase influencers, fieldwork Q3 2026.

Authored by
Tim Sheedy
Singularity Research

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