



Insights for Global SMB Leaders

The \$30M line splits the SMB market in two

Below \$30M is CEO-led and cost-driven. Above \$30M is CISO-influenced and productivity-focused. Each segment requires a unique GTM motion.

Agentic AI is the #1 budget priority for SMBs

Generative AI spend growth (15.4-18.7%) is more than 2x that of revenue growth (6.3%). The signal is clear: SMBs see AI as an investment in competitive survival, not a cost to be managed.

84% see integrated stacks as critical, but only 29% have operationalized them

SMBs need help operationalizing data, governance, and AI together. 62% select technology providers based on industry specialization—3.6x more than generic certifications.

96%

of SMBs are acting on AI, but 54% are held back by data

The top AI adoption barriers are data quality (47%), cybersecurity (53%), and integration complexity (47%). SMBs are AI-ready in mindset but data-blocked in practice.

55%

of SMBs compete on speed-to-market, not price

ROI is measured by productivity (50%) over cost savings (15%). The “save money” message is misaligned with buyer priorities. Focus instead on measurable performance outcomes.

38%

of AI budget sits with functional department heads—not IT

SMB AI purchase decisions are business-led with security oversight. LoB heads act as AI champions and the CEO signs the check, but the CISO also holds veto power.

37%

of SMBs are frustrated by aggressive AI sales pitches

Strengthening data governance for AI is the #1 cloud initiative for SMBs, not AI integration. Decision-makers want AI on their terms: governed, safe, and solving real problems.

Only 17% of SMBs accept fully public cloud AI architecture

41% favor virtual private cloud (VPC), 38% prefer hybrid deployments, and 43% have ended up multi-cloud by accident. SMBs want a unified platform that meets them where their data already lives.

28%

of SMBs run on legacy systems—but only 2% want to

Most are blocked by security concerns and lack of ROI clarity. Show them a safer, more predictable path to where they already want to go.

35%

of SMBs use gen AI as their primary research tool

Buyers now discover with AI, validate with analyst reports (60%), and convert through free trials (23%), demos (22%), and ROI calculators (21%).