kenso

KENSO RESEARCH · METHODOLOGY

Half of B2B website tools are gone within 4 years

The data, the methods, every number and every limitation behind the study.

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ABOUT THE DATA

This study uses Kenso internal data: the company, people and web records Kenso uses for sales and outreach, reused by Cristian Frunze for this study.

Aggregates only. Any group smaller than 50 people is suppressed, and no individual is named.

Figures 1 to 4 are the study page's charts, drawn from the same numbers. The methodology after them keeps the full tables.

SUMMARY

Half of B2B website tools are gone within 4 years

Half of the tools B2B software companies add to their homepage are gone within 4 years. Live chat peaked on 14.5% of homepages in 2019 and is on 7.8% now.

44.3%

of 18,951 new tool installs on B2B software homepages were still live four years later. 79.3% lasted to the next yearly snapshot.

-46%

for live chat, from 14.5% of homepages at its 2019 peak to 7.8% in 2026. Drift fell from 2.6% in 2020 to 0.2%.

8 years

median life of a new tag manager install, against 3 years for chat, cookie consent, forms, marketing automation and scheduling tools.

63.5%

of homepages ran a tag manager in 2026, up from 3.4% in 2014. Cookie consent banners grew from 0.3% to 16.8%.

Data and method

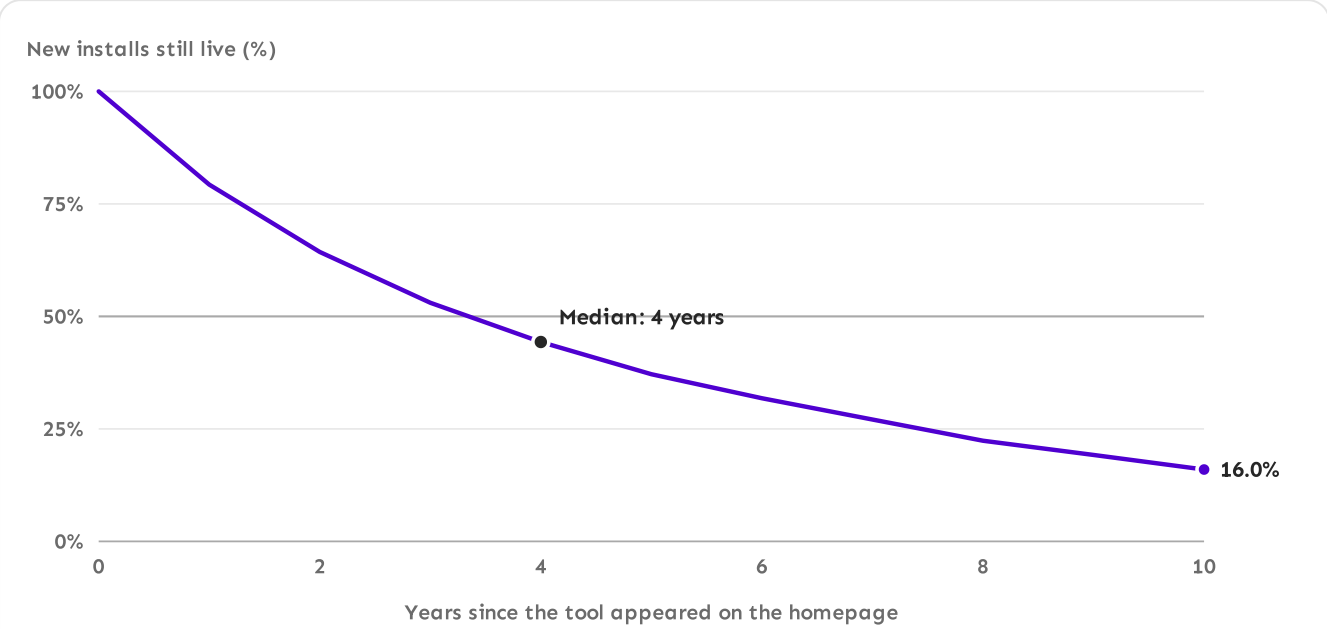
Data	Kenso internal data: Kenso's archive of company websites, one homepage snapshot per company per year, and the company records Kenso uses for sales and outreach, reused by Cristian Frunze for this study. Companies headquartered in the US, the UK, Canada, Australia, Ireland and New Zealand.
Sample	55,285 usable yearly homepage snapshots from a random sample of 10,000 B2B software companies with 11 to 5,000 employees; 18,951 new tool installs across 40 widely used tools.
Date range	One homepage snapshot per company per year, 2014 to 2026.
Method	Tools detected with Kenso's technology detector and counted only when the loading script was live on the page. Yearly adoption shares, Kaplan-Meier survival of new installs and same-year switching. Headline numbers recomputed by an independent analysis.
Excluded	• Parked pages and pages with fewer than 50 words of visible text • Tools found only in HTML comments, plain links or page text • Tools inside the product, on other pages or loaded only through a tag manager • Any count under 50 companies
Privacy	Aggregates only. Any group smaller than 50 people is suppressed, and no individual is named.

FIGURES

The study's charts

FIGURE 1

Fewer than half of new installs last four years

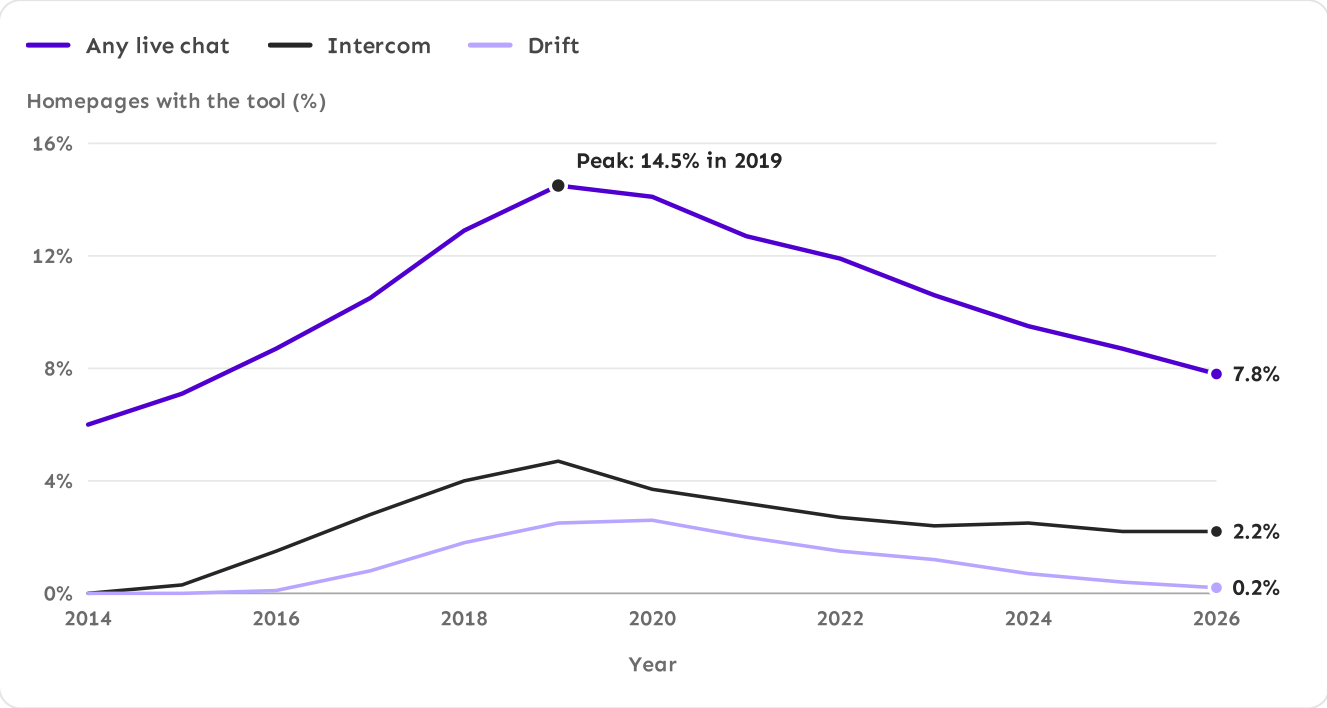


Share of 18,951 new tool installs on B2B software homepages still live after each number of years (Kaplan-Meier estimate). Installs are timed from yearly snapshots, so each duration is an upper bound by up to a year. The line at 50% marks the median.

Source: Kenso internal data (Kenso's archive of company websites and the company records Kenso uses for sales and outreach), analysed by Cristian Frunze.

FIGURE 2

Live chat peaked in 2019 and has fallen every year since

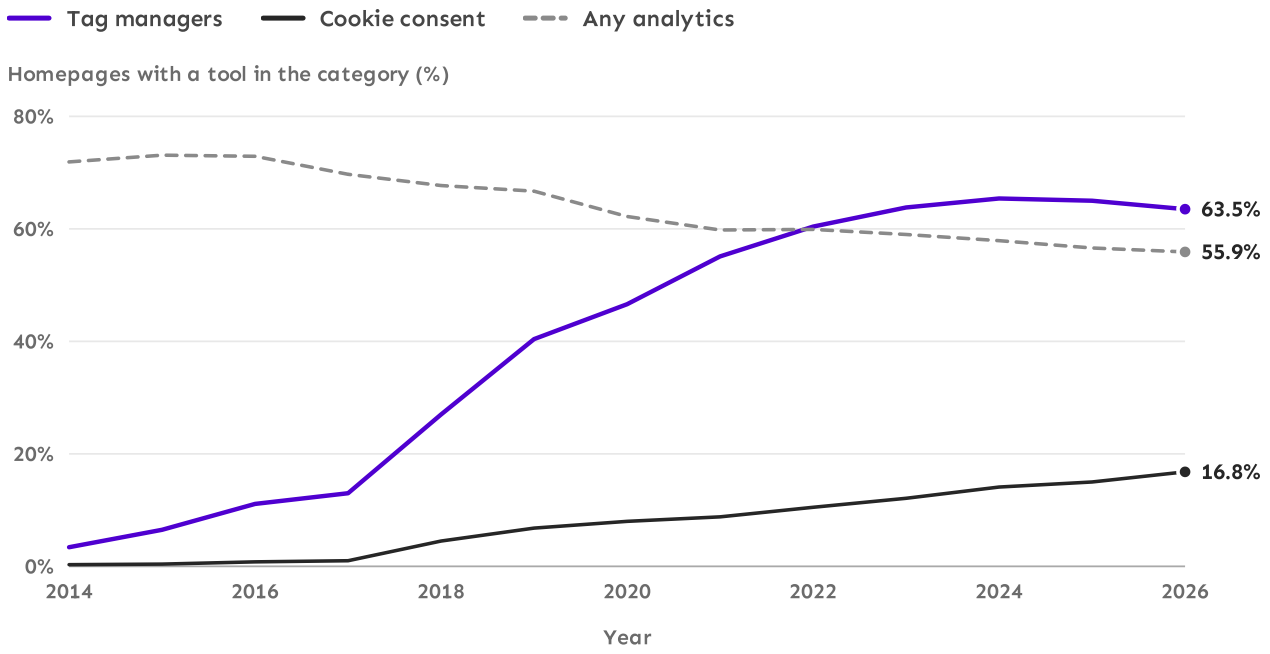


Share of usable B2B software homepages with a live chat widget loaded, by year, and two of the best-known chat tools, Intercom and Drift. A tool counts only when its loading script is live on the page.

Source: Kenso internal data (Kenso's archive of company websites and the company records Kenso uses for sales and outreach), analysed by Cristian Frunze.

FIGURE 3

Tag managers and consent banners spread as analytics tags thinned

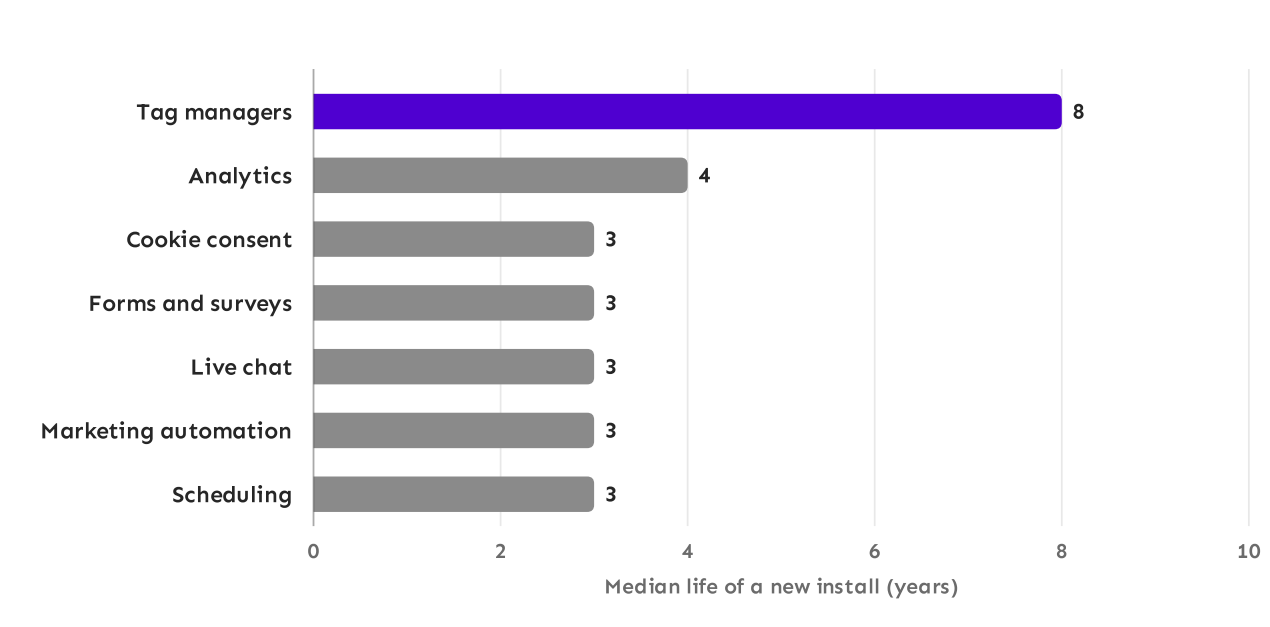


Share of usable B2B software homepages with at least one tool in each category, by year. Analytics loaded through a tag manager does not show in the page code, so part of the analytics decline may be tools moving inside one.

Source: Kenso internal data (Kenso's archive of company websites and the company records Kenso uses for sales and outreach), analysed by Cristian Frunze.

FIGURE 4

Tag managers last 8 years, most other tools 3



Median years until half of the new installs in each category were gone (Kaplan-Meier). Scheduling rests on the fewest installs, 151; analytics on the most, 5,844.

Source: Kenso internal data (Kenso's archive of company websites and the company records Kenso uses for sales and outreach), analysed by Cristian Frunze.

FULL METHODOLOGY

The data, the methods and every number

Data through the web archive's 2026 crawls.

Question

How fast do B2B website tools (chat, analytics, marketing automation, forms, scheduling, consent) spread from early adopters to the mainstream, how fast do they decline, and which tools replaced which?

Data

- **Companies.** The shared homepage panel built for Kenso Research: a seeded simple random sample of 10,000 records from Kenso internal data company records (Kenso's dataset of public company records) in seven software and internet industries, headquartered in the US, UK, Canada, Australia, Ireland or New Zealand, founded 1950-2018, with 11 to 5,000 employees today. Platform domains and domains shared by several records were removed before sampling.
- **Homepages.** One web archive capture of each company's homepage per calendar year, 2014-2026: the crawl nearest mid-year, with a second crawl in the same year as a fallback when the first had no capture. The captures were fetched once for every study that uses the panel; this study read the stored archived page records and fetched nothing.
- **Usable captures.** HTTP 200, not a parked or for-sale page, and at least 50 words of visible text. 55,285 usable company-years in total:

Year	Usable homepages
2014	2,570
2015	2,689
2016	3,114
2017	4,103
2018	4,550
2019	4,692
2020	4,886
2021	5,083
2022	5,103
2023	4,899
2024	4,896
2025	4,437
2026	4,263

Early years have fewer usable captures because Kenso's web archive captured fewer of these sites then.

Tool detection

1. **Kenso's offline technology detector** (detector version 1.2.0, a fingerprint corpus of 7,539 technologies and 7,723 patterns) ran on every capture with HTML comments removed. The stock command line runs each pattern inside a

sandbox with a timer, which took about 28 seconds per page; we called the same detector functions with that per-pattern timer switched off, which leaves matching unchanged. On 48 random captures both ways returned identical results (48 of 48 documents, 369 technology hits each).

2. **Live-signature check.** Offline, the detector sees only the static page. Chat widgets and many marketing tools are loaded by a short inline script, which the detector's patterns mostly do not match (Drift, for example, has only JavaScript-runtime fingerprints). For 67 common tools we matched each vendor's loader address in script `src` attributes and in the code of executable inline scripts.
3. **Counting rule (stale tags).** A tool counts on a capture when the live-signature check fires, or when the detector reports evidence that only a live loader produces: a script source, a response header or a cookie. Mentions in HTML comments, page text, ordinary links (such as a link to a Calendly page) and tools only implied by another tool do not count.
4. **Categories.** From the detector's categories: live chat, cookie compliance (called cookie consent here), appointment scheduling, form builders and surveys (one category, forms and surveys), marketing automation, tag managers and analytics. A tool in several of these gets one, in that order. Following the detector, any Google tag (`gtag.js`) counts as Google Analytics and also as a tag manager. Universal Analytics and Google Analytics 4 are told apart by their tracking ids.
5. **Focal tools.** Tools on at least 1% of usable homepages in at least one year: 40 tools.

Validation

On the 2026 crawl we compared detection with the technology field in Kenso's company website index, built from the same September 2026 crawl, for 3,448 companies with a usable 2026 homepage in both. That index can include a domain's other pages (median two pages) and evidence a static page does not show, so it is a cross-check rather than ground truth. Positive agreement is 2 x both / (ours + theirs).

Detection	Tool	This study	Website index	Both	Agreement
detector, all evidence	All tools in this table (pooled)	6,430	5,277	4,823	0.82
detector, all evidence	Google Tag Manager	2,206	1,605	1,485	0.78
detector, all evidence	Google Analytics	1,422	1,394	1,387	0.99
detector, all evidence	Site Kit	99	321	99	0.47
detector, all evidence	Contact Form 7	325	320	306	0.95
detector, all evidence	Linkedin Insight Tag	312	307	305	0.99
detector, all evidence	Cloudflare Browser Insights	291	290	288	0.99
detector, all evidence	Google Ads Conversion Tracking	256	257	254	0.99
detector, all evidence	HubSpot	636	225	205	0.48
detector, all evidence	CookieYes	205	192	190	0.96
detector, all evidence	Gravity Forms	102	122	101	0.90
detector, all evidence	Cookiebot	67	69	67	0.99
detector, all evidence	Complianz	under 50	62	under 50	0.59
detector, all evidence	OneTrust	61	59	58	0.97
detector, all evidence	Ahrefs	52	54	52	0.98
detector, all evidence	Facebook Pixel	250	under 50	under 50	0.00
detector, all evidence	Sirvoy	120	under 50	under 50	0.00

Detection	Tool	This study	Website index	Both	Agreement
study counting rule	All tools in this table (pooled)	6,223	5,290	3,931	0.68
study counting rule	Google Tag Manager	2,229	1,605	1,436	0.75
study counting rule	Google Analytics	1,562	1,394	1,388	0.94
study counting rule	Site Kit	under 50	321	under 50	0.00
study counting rule	Contact Form 7	325	320	306	0.95
study counting rule	Linkedin Insight Tag	under 50	307	under 50	0.01
study counting rule	Cloudflare Browser Insights	291	290	288	0.99
study counting rule	Google Ads Conversion Tracking	under 50	257	under 50	0.01
study counting rule	HubSpot	589	225	under 50	0.12
study counting rule	CookieYes	212	192	190	0.94
study counting rule	Gravity Forms	85	122	84	0.81
study counting rule	Cookiebot	69	69	68	0.99
study counting rule	Complianz	76	62	62	0.90
study counting rule	OneTrust	70	59	59	0.91
study counting rule	Ahrefs	under 50	54	under 50	0.00
study counting rule	Leadfeeder	58	under 50	under 50	0.00
study counting rule	Hotjar	135	under 50	under 50	0.00
study counting rule	Intercom	74	under 50	under 50	0.00
study counting rule	Microsoft Clarity	172	under 50	under 50	0.00
study counting rule	HubSpot Forms	274	under 50	under 50	0.00

Like for like (detector, all evidence types), agreement is 0.82 over the tools in the table, and 0.94 to 0.99 for Google Analytics, Contact Form 7, CookieYes, Cookiebot and OneTrust. Two gaps are explained: the website index lists HubSpot mostly on sites hosted on HubSpot's CMS (199 of its 225 HubSpot sites also carry the CMS key), while this study counts the HubSpot tracking script; and tools such as the LinkedIn Insight Tag are found there from evidence a static homepage does not hold. The study's own counting rule agrees less (0.68) by design, because it drops HTML-only matches and adds inline loaders.

Methods

- **Adoption share:** the share of usable homepages in a year with the tool, or with any tool in the category, with 95% Wilson intervals.
- **Bass diffusion:** Bass's (1969) discrete least-squares form, the yearly change in share regressed on last year's share and its square, giving market potential m, innovation p and imitation q. Reported only where all three come out positive.
- **Rise and decline:** years from half of the peak share to the peak, and from the peak back to half, by linear interpolation between yearly captures.
- **Switching:** in consecutive years where a company has usable captures in both, a tool gone and another tool of the same category new.
- **Churn:** among company-years with the tool and a usable capture the next year, the share without the tool the next year.

- **Survival:** Kaplan-Meier curves for new installs (a tool appearing after the company's first usable capture). An install ends at the first later usable capture without the tool; a year with no usable capture is bridged when the tool is present on both sides; installs still present at a company's last capture are censored. Durations count from the first capture with the tool to the first capture without it, so they are upper bounds by up to a year.
- **Suppression:** no published count under 50 companies; every published share is over at least 50 companies.

Results

Adoption by category

Year	Usable homepages	Analytics	Tag managers	Marketing automation	Forms and surveys	Live chat	Cookie consent	Scheduling
2014	2,570	71.9%	3.4%	10.1%	10.7%	6.0%	0.3%	0.0%
2015	2,689	73.1%	6.5%	13.0%	14.1%	7.1%	0.4%	0.0%
2016	3,114	72.9%	11.1%	14.6%	18.4%	8.7%	0.8%	0.0%
2017	4,103	69.7%	13.0%	15.3%	22.1%	10.5%	1.0%	0.1%
2018	4,550	67.7%	27.0%	18.5%	24.3%	12.9%	4.5%	0.2%
2019	4,692	66.7%	40.4%	20.4%	26.3%	14.5%	6.8%	0.7%
2020	4,886	62.2%	46.6%	20.2%	26.8%	14.1%	8.0%	0.9%
2021	5,083	59.8%	55.1%	21.3%	29.5%	12.7%	8.8%	1.1%
2022	5,103	59.9%	60.4%	22.5%	27.5%	11.9%	10.5%	1.3%
2023	4,899	59.0%	63.8%	22.6%	25.6%	10.6%	12.1%	1.8%
2024	4,896	57.9%	65.4%	22.4%	25.3%	9.5%	14.1%	2.0%
2025	4,437	56.6%	65.0%	22.6%	23.7%	8.7%	15.0%	1.7%
2026	4,263	55.9%	63.5%	21.7%	21.0%	7.8%	16.8%	1.5%

Survival of new installs

Pooled over the focal tools: 18,951 new installs, 9,301 removals. 79.3% survive to the next yearly capture, 53.0% to year 3 and 44.3% to year 4; the median is 4 years. Median by category: analytics 4, cookie consent 3, forms and surveys 3, live chat 3, marketing automation 3, scheduling 3, tag managers 8 years.

Tools

Tool	Category	Peak share (year)	2026 share	Rise / decline years	Annual churn	Median years (new installs)	Bass fit
Google Analytics	Analytics	71.1% (2015)	45.4%	before window / beyond window	12%	5	
Cloudflare Browser Insights	Analytics	8.7% (2026)	8.7%	0.8 / beyond window	14%		
Hotjar	Analytics	6.2% (2019)	4.0%	2.9 / beyond window	29%	2	p 0.256, q 0.45, m 5.5%
Microsoft Clarity	Analytics	4.6% (2026)	4.6%	2.4 / beyond window	30%	3	p 0.015, q 0.68, m 6.1%

Tool	Category	Peak share (year)	2026 share	Rise / decline years	Annual churn	Median years (new installs)	Bass fit
MonsterInsights	Analytics	4.2% (2019)	1.4%	1.6 / 6.4	31%	3	p 0.203, q 0.05, m 3.2%
Crazy Egg	Analytics	2.5% (2016)	0.5%	1.3 / 4.7	39%	2	
Zoominfo	Analytics	2.3% (2023)	0.7%	2.0 / 1.7	31%	2	p 0.068, q 0.62, m 1.7%
Leadfeeder	Analytics	2.1% (2024)	1.6%	3.9 / beyond window	28%	3	p 0.047, q 1.13, m 1.9%
ExactMetrics	Analytics	1.6% (2020)	0.1%	0.8 / 2.3	43%	2	p 0.080, q 0.30, m 0.9%
Lead Forensics	Analytics	1.4% (2018)	0.4%	1.3 / 5.0	22%	4	p 0.243, q 0.05, m 0.9%
Mixpanel	Analytics	1.3% (2015)	0.5%	before window / 5.2	29%	2	
Statcounter	Analytics	1.2% (2014)	0.1%	before window / 1.7	20%		
CookieYes	Cookie consent	5.7% (2026)	5.7%	4.4 / beyond window	27%	3	p 0.009, q 0.37, m 7.6%
Cookie Consent (open source, Osano)	Cookie consent	2.5% (2019)	0.6%	1.2 / 5.0	24%	3	
Complianz	Cookie consent	2.1% (2026)	2.1%	3.0 / beyond window	22%	4	p 0.011, q 1.01, m 1.9%
Cookiebot	Cookie consent	2.0% (2026)	2.0%	5.2 / beyond window	21%	4	p 0.040, q 0.32, m 2.3%
Cookie Notice	Cookie consent	2.0% (2020)	0.7%	2.0 / 0.9	44%	2	p 0.095, q 0.54, m 1.3%
OneTrust	Cookie consent	2.0% (2026)	2.0%	5.0 / beyond window	17%	4	p 0.003, q 0.93, m 1.9%
Contact Form 7	Forms and surveys	19.4% (2019)	9.4%	before window / 6.8	21%	4	
HubSpot Forms	Forms and surveys	9.5% (2021)	7.9%	0.9 / beyond window	29%	2	
Gravity Forms	Forms and surveys	3.1% (2025)	2.6%	8.0 / beyond window	26%	3	p 0.115, q 0.34, m 2.9%
WPForms	Forms and surveys	2.7% (2024)	0.5%	2.9 / 0.7	46%	2	

Tool	Category	Peak share (year)	2026 share	Rise / decline years	Annual churn	Median years (new installs)	Bass fit
Marketo Forms	Forms and surveys	1.1% (2020)	0.8%	5.3 / beyond window	28%	3	
Intercom	Live chat	4.7% (2019)	2.2%	2.3 / 5.5	25%	3	p 0.245, q 0.15, m 3.2%
Olark	Live chat	2.6% (2015)	0.2%	before window / 2.0	34%	2	
Drift	Live chat	2.6% (2020)	0.2%	2.5 / 2.7	38%	2	p 0.143, q 0.04, m 1.4%
Tawk.to	Live chat	2.2% (2020)	1.1%	2.7 / beyond window	23%	3	p 0.145, q 0.47, m 1.7%
Zendesk Chat	Live chat	2.2% (2016)	0.8%	before window / 7.8	25%	3	
LiveChat	Live chat	1.2% (2018)	0.3%	3.9 / 2.8	30%	2	
Zoho SalesIQ	Live chat	1.2% (2021)	1.0%	3.4 / beyond window	23%	4	p 0.105, q 0.83, m 1.1%
HubSpot	Marketing automation	16.7% (2026)	16.7%	8.8 / beyond window	21%	4	p 0.051, q 0.31, m 16.8%
Marketo	Marketing automation	3.0% (2015)	0.6%	before window / 2.5	28%	3	
Salesforce Marketing Cloud Account Engagement	Marketing automation	2.5% (2016)	1.1%	before window / 9.3	28%	3	
BDOW	Marketing automation	1.7% (2017)	0.0%	1.6 / 0.8	48%	2	
Sumo	Marketing automation	1.7% (2017)	0.0%	1.6 / 0.8	48%	2	
ActiveCampaign	Marketing automation	1.4% (2022)	0.9%	2.9 / beyond window	29%	2	p 0.120, q 0.42, m 1.1%
MailChimp	Marketing automation	1.3% (2021)	0.7%	3.5 / beyond window	29%	3	p 0.165, q 0.22, m 1.1%
Act-On	Marketing automation	1.2% (2015)	0.2%	before window / 3.7	32%	3	
Calendly	Scheduling	1.5% (2024)	1.2%	2.9 / beyond window	28%	3	p 0.034, q 0.70, m 1.4%
Google Tag Manager	Tag managers	65.4% (2024)	63.5%	5.6 / beyond window	9%	8	p 0.024, q 0.63, m 64.5%

BDOW and Sumo are the same product under two names in the detector corpus and appear as two rows.

Switching

Category	Removals	Replaced in the same year	Replacement installs	To point tools	To HubSpot	To Google	To Salesforce
Scheduling	120	2%	under 50				
Marketing automation	2,410	11%	249	47%	38%	0%	14%
Tag managers	1,646	0%	under 50				
Forms and surveys	2,685	11%	306	61%	39%	0%	0%
Cookie consent	863	14%	119	100%	0%	0%	0%
Analytics	5,533	11%	558	80%	0%	20%	0%
Live chat	1,439	12%	176	99%	0%	0%	1%

Tool-to-tool flows of at least 50 companies:

Category	From	To	Companies
Forms and surveys	Contact Form 7	HubSpot Forms	81
Analytics	Google Analytics	Hotjar	52

Most common replacement installs (at least 50 companies):

Category	Tool	Replacement installs
Forms and surveys	HubSpot Forms	120
Analytics	Google Analytics	111
Analytics	Hotjar	99
Marketing automation	HubSpot	95
Analytics	Cloudflare Browser Insights	63
Forms and surveys	Contact Form 7	57

Universal Analytics and GA4

Universal Analytics peaked at 73.6% of usable homepages and was on 12.6% in 2026; GA4 was on 29.7% in 2026.

Hypotheses (pre-registered 2026-10-19)

1. **Spread slow, decline fast. Not supported.** Of 19 focal tools with a peak of at least 2% inside the window, 7 have both a measurable rise and decline; 2 of them declined faster than they rose. Live chat as a category rose from half its peak to the peak in 3.9 years and, 7 years after the peak, is still above half of it.
2. **Half of installs gone within 4 years, median under 4. Not supported as stated.** The median is exactly 4 years (survival 53.0% at year 3, 44.3% at year 4), and the pre-registered test was a median under 4. Chat and marketing automation (median 3) churn faster than analytics (4) and tag managers (8), as expected.
3. **Consent tools spread fastest in 2019-2026, more than doubling. Supported** on relative growth (2.47 times, ahead of scheduling at 2.07 and tag managers at 1.57). In percentage points tag managers gained more (23.1 against 10.0).
4. **Live chat peaked and fell at least 20%. Supported.** Peak 14.5% in 2019, 7.8% in 2026 (-46%). Drift rose and fell (2.6% in 2020 to 0.2%); Intercom held up better (4.7% to 2.2%). HubSpot's chat was too rare on homepages to measure.

5. **Replacements run inside the suites. Mostly not supported.** Suites took 53% of replacement installs in marketing automation and 39% in forms, but 20% in analytics and almost none in chat or consent. The largest single flow is Contact Form 7 to HubSpot Forms.

Robustness

Variant	Median years (new installs)	New installs	Live chat 2026 vs peak	Cookie consent 2026/2014	Tag managers 2026/2014
main	4	18,951	-46%	54.1	18.5
primary crawl only	4	17,379	-48%	55.7	18.9
detector only	4	13,281	-22%	48.2	950.7
all evidence	4	22,788	-44%	54.2	19.8
balanced panel	3	2,811	-56%	135.0	16.8
no tag manager	4	4,873	-63%	31.9	

- **Primary crawl only** drops the fallback captures. **Detector only** drops the live-signature check; it misses most inline chat loaders, which is why its chat decline is smaller. **All evidence** counts every detector match. **Balanced panel** keeps only companies with a usable capture in every year. **No tag manager** keeps only company-years with no tag manager, where no tool can hide inside one.

Verification

An independent re-analysis, written from the study plan alone without seeing our code, recomputed the headline numbers from the study extract. All 37 checked numbers matched to the reported precision, as did the usable homepages in each year and the median survival in each category.

Limitations

- **Homepage only, static HTML only.** Tools inside the product, on other pages or loaded by a tag manager are not seen. Tag managers spread from 3.4% to 63.5% of homepages, so some later declines could be tools moving inside one; the no-tag-manager variant shows the chat decline there too.
- **Live loaders, not use.** A loader on the page shows the tool was installed, not that anyone used it or paid for it.
- **Survivor sample.** The companies exist in today's records, so companies that closed before 2026 are missing, more so in early years. Size, industry and founding year are as recorded today.
- **Crawl coverage.** Kenso's web archive does not capture every site every year; small sites are captured less often, and sites that block crawlers are missing. A year with no usable capture is bridged in survival only when the tool is on both sides.
- **Yearly snapshots.** Install and removal dates are known to the year, and survival durations are upper bounds.
- **Detector coverage.** The live-signature list covers 67 common tools; rarer tools rely on the detector alone. Validation against the website index is for 2026 only.
- **Industry labels** do not separate B2B from B2C software.

Sources

- Kenso's web archive, monthly crawls June 2014 to September 2026.
- Kenso internal data: Kenso's dataset of public company records (company sample only; no person data used).
- Bass, F. M. (1969). A new product growth for model consumer durables. Management Science 15(5), 215-227.
- Kaplan, E. L. and Meier, P. (1958). Nonparametric estimation from incomplete observations. Journal of the American Statistical Association 53(282), 457-481.
- Kenso Research shared homepage panel (built for the Kenso Research study *Half of B2B software homepages now say AI. Did it pay off?*).