

RESEARCH REPORT · AI IN MARKETING

The 2026 State of AI Adoption in B2B Marketing

Adoption is near-universal; impact is not. This report compiles what the 2026 survey data, spend research, and new regulation actually say about AI in marketing, with a B2B lens on what separates the teams getting measurable returns from the majority still stuck at proof-of-concept. Every figure is linked to its source and dated; where sources disagree, we show the disagreement.

87%

of marketers use generative AI in at least one recurring workflow, up from 51% in 2024 (Salesforce)

15.3%

of marketing budgets now go to AI initiatives (Gartner CMO Spend Survey, 2026)

1%

of organizations describe their AI deployment as mature (McKinsey), the adoption-to-impact gap in one number

3.2x

reported ROI on AI content drafting, the highest of any marketing application (McKinsey, self-reported)

37 pts

gap between advertiser and consumer sentiment on AI ads, widening from 32 in 2024 (IAB)

Aug 2

EU AI Act disclosure rules took effect Aug 2, 2026, with fines up to €15M or 3% of global turnover

- The adoption race is over: non-adopters are now statistical outliers. The competition has moved to **maturity**: readiness, governance, and measurement.
- Consumers are moving the opposite direction from advertisers: trust in AI-heavy creative is falling as usage rises. Quality and disclosure are the new brand-safety frontier.
- Returns are real but uneven: teams that pre-agree success criteria with finance cut year-one ROI failure from 40% to 22%.
- Agentic AI is the 2026 frontier: enterprise teams running autonomous agents in production more than doubled in two quarters, but 40%+ of agentic projects are forecast to be canceled by 2027.

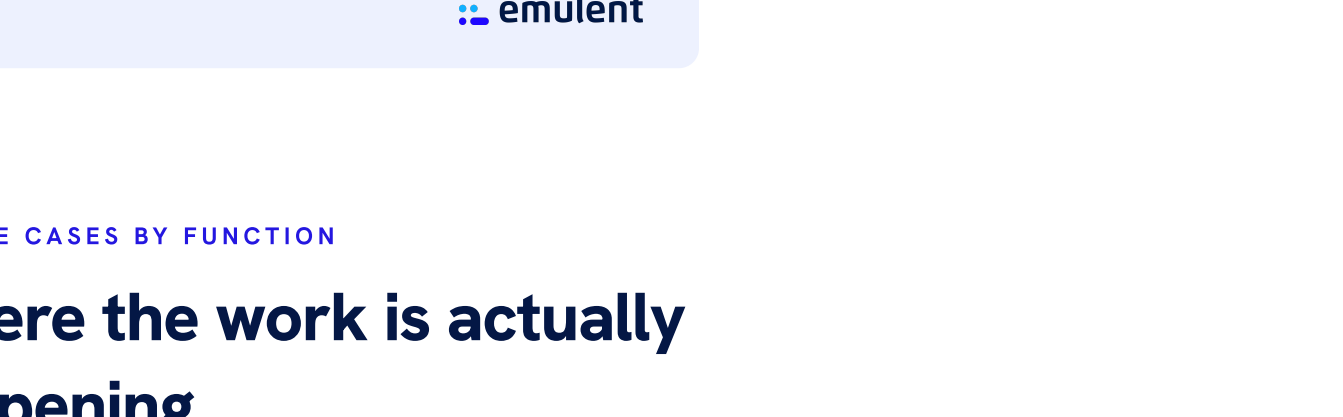
01 · ADOPTION BENCHMARKS

From experiment to default in 24 months

The most reliable longitudinal dataset comes from Salesforce's State of Marketing series, which asked the same question three years running: the share of marketers using generative AI in at least one recurring workflow went from [51% in Q1 2024 to 76% in Q1 2025 to 87% in Q1 2026](#), roughly 1.5 points a month for two years. Daily use tells the same story: [88% of marketers report using AI tools daily](#) (SurveyMonkey), and Jasper's 1,400-marketer survey puts active use at [91%](#). Duke's CMO Survey measures it differently, as the share of marketing *activities* using GenAI, and found a [116% year-over-year surge to 15.1% of all activities](#), which is the more sobering read: near-universal usage, still a minority of the actual work.

Generative AI in at least one recurring marketing workflow

Salesforce State of Marketing, same question across three annual surveys



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By company size

Enterprise marketing teams (250+): [94% adoption](#); mid-market 91%; even micro-teams crossed 73%. The enterprise "adoption moat" narrowed from 28 points to 21 in a year; tooling got cheap enough that size no longer gates access.

By region

North America leads at [91%](#), Western Europe [88%](#), APAC [84%](#), LatAm [79%](#), MEA [71%](#) (HubSpot AI Trends 2026). Japan lags at 69% despite high digital maturity: cultural caution, not technical barriers.

For B2B specifically, [71% of B2B marketing teams report at least one GenAI use case in production](#) (n=4,800), and B2B SaaS ranks second among US industries at 82% adoption, behind only e-commerce at 87%.

02 · BUDGETS & INVESTMENT

AI spend is rising inside flat budgets

Gartner's 2026 CMO Spend Survey (401 marketing leaders, fielded January–March 2026, mostly \$1B+ revenue firms) found [CMOs allocating an average 15.3% of marketing budget to AI](#), while overall marketing budgets stayed effectively flat at 7.8% of company revenue (from 7.7% in 2025). AI transformation is being funded by reallocation, not new money. The telling split: organizations with mature AI readiness allocate [21.3% of budget to AI](#), nearly 50% above the average: budget follows readiness, not the reverse.

Share of marketing budget allocated to AI

Gartner CMO Spend Survey 2026 · scale 0-25%



Only 30% of CMOs report mature or fully developed AI readiness, while 70% call AI leadership a critical 2026 goal, a 40-point ambition gap.

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\$1,200 → \$3,400/mo
Median mid-market marketing team AI tool spend, Q1 2025 → Q1 2026, [tripled in 12 months](#)

21.9% → 24.5%
Labor's share of marketing budget, per Gartner: [AI raised the price of the people who can direct it](#), rather than cutting people costs

99%
of marketing leaders plan to increase AI spending in 2026 (Canva State of Marketing & AI)

03 · USE CASES BY FUNCTION

Where the work is actually happening

Content is the beachhead. [93% of marketers use AI to speed up content creation](#), and adoption by function follows a clear line from text-heavy roles down to relationship-driven ones. In B2B demand generation, AI has moved past drafting into the buyer-research layer: prompt-level search optimization (AEO/GEO), lead scoring and qualification, and pipeline attribution.

AI adoption by marketing function

HubSpot AI Trends 2026 · share of practitioners using AI in their core workflow



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Content & creative

Drafting, variant generation, and A/B testing at scale. [JPMorgan Chase found its best AI-written ad variant lifted CTR up to 450%](#) vs. human copy. Teams producing with AI report [42% more content per month](#).

Segmentation & lifecycle

Segment-of-one email and web experiences. One ZoomInfo-cited case: [+30% email open rates, +20% conversions](#) from AI personalization; predictive analytics drove [+40% ROAS](#) in a B2B case study.

Analytics & media

Bid management is the leading agentic use case: high-frequency decisions with a clear ROAS signal. Automated model pipelines in direct marketing added [~15,000 high-value customers per campaign](#) and [\\$9M incremental revenue](#) in one deployment.

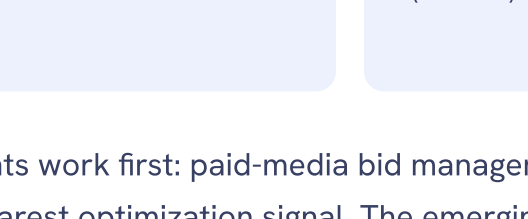
04 · ROI & PERFORMANCE EVIDENCE

The returns are real, self-reported, and uneven

A necessary caveat up front: most ROI figures in this field are practitioner-reported survey data, not controlled experiments: [perceived ROI, not independently measured financials](#). With that lens: McKinsey's application-level benchmarks put content drafting at 3.2x and personalization engines at 2.7x; aggregate comparisons find AI-driven campaigns delivering [22% higher ROI, 32% more conversions, and 29% lower acquisition costs](#) than traditional approaches. On time: marketers report saving [an average of 11 hours per week and being 44% more productive](#) (ZoomInfo); HubSpot's read is a more conservative [6.1 hours per week](#), with senior practitioners saving the most.

Reported ROI by application

McKinsey survey benchmarks (self-reported) · scale 0-5.5x



The agentic figure applies only to fully replaced decision workflows, and carries the highest abandonment risk (see section 06).

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15-25%
Median pipeline contribution lift from GenAI pilots within 12 months in B2B (n=1,363)

-30%
Average reduction in cost per qualified lead among B2B teams using AI in demand gen

40% → 22%
AI initiatives missing year-one ROI targets, cut nearly in half when quantitative success criteria are pre-agreed with finance at kickoff

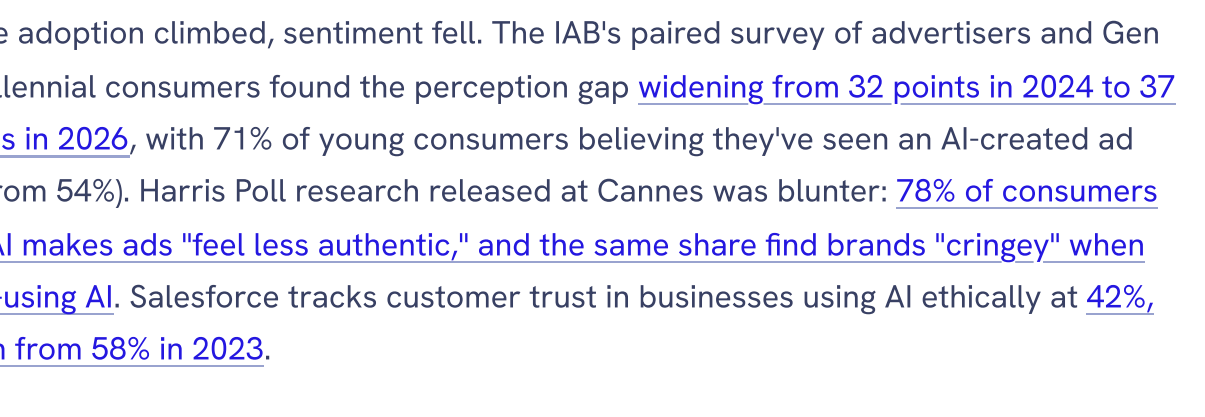
05 · THE MATURITY GAP

Everyone adopted. Almost no one scaled.

This is the defining finding of 2026 across every major source. McKinsey (3,613 employees, 238 C-level executives); nearly all companies invest in AI, but [only 1% believe they are at maturity](#), and only 26% of organizations have the capabilities to move beyond proof-of-concept into production. The failure data is getting worse, not better: [42% of companies abandoned most of their AI initiatives in 2025, up from 17% in 2024](#).

The funnel from usage to impact

Each stage from independent 2026 survey sources: different samples, one consistent shape



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The paradox is stable because the alternative is worse: [91% of teams say GenAI "takes too long" to implement, while 93% budget for continued investment](#). Teams aren't adopting AI because it's easy; they're adopting it because non-adoption is becoming a competitive disadvantage faster than the friction can be resolved. What separates the 26%: pre-agreed metrics, governance, and workflow redesign rather than tool purchases layered onto old processes.

06 · AGENTIC AI

The 2026 frontier: agents in production

The conversation moved from "generate this" to "run this." [34% of enterprise marketing teams now run at least one autonomous agent in production, more than double the 14% of Q4 2025](#). Among agencies, a 250-firm survey found [41% with at least one agent shipped](#) (drafting briefs, running SEO audits, iterating ad copy, qualifying leads), though the bottom quartile isn't breaking even on token spend. HubSpot puts full end-to-end campaign automation at a [19.2% early-adopter cohort](#), and Gartner projects [40% of enterprise applications will include task-specific agents by the end of 2026](#).

14% → 34%

Enterprise teams with an agent in production, Q4 2025 → Q1 2026

29%

of attempted agent deployments abandoned within 90 days (Gartner)

40%+

of agentic AI projects forecast to be canceled by end of 2027: unclear ROI, escalating costs, weak governance

Where agents work first: paid-media bid management, the highest-frequency decisions with the clearest optimization signal. The emerging pattern is the ["self-optimising marketing stack"](#): a lead crosses a score threshold, one agent triggers personalized outreach, another adjusts remarketing audiences, a third updates the pipeline forecast, a workflow that took four humans across two tools running autonomously. The operational discipline that separates 11x from 0.7x returns in the agency data: evaluation harnesses, observability, cost caps, and a talent ladder for people who direct agents.

07 · ORG STRUCTURE & SKILLS

Teams are reshaping around the tools

The workforce impact is concentrated, not general. [23% of agencies reduced junior copywriting headcount in 2025 and 31% plan further cuts in 2026](#), while demand for senior strategists climbs, consistent with Gartner's finding that labor's budget share rose as AI adoption grew. McKinsey's leadership survey found [46% of leaders citing workflow skill gaps as a significant barrier](#) to getting value from AI.

Roles are shifting up the stack

Content creators become brand-voice strategists; analysts become insight interpreters; marketers become [workflow architects](#). The scarce skill isn't prompting; it's designing, evaluating, and governing AI-assisted workflows.

Human enterprise is the production norm

[76% of reviews run human-in-the-loop review](#) to catch hallucinations before deployment, and [78.4% of social marketers apply moderate-to-extensive editing](#) to AI-assisted content before publishing.

08 · CONSUMER ATTITUDES

Marketers and audiences are moving in opposite directions

While adoption climbed, sentiment fell. The IAB's paired survey of advertisers and Gen Z/Millennial consumers found the perception gap [widening from 32 points in 2024 to 37 points in 2026](#), with 71% of young consumers believing they've seen an AI-created ad (up from 54%). Harris Poll research released at Cannes was blunter: [78% of consumers say AI makes ads "feel less authentic," and the same share find brands "cringey" when over-using AI](#). Salesforce tracks customer trust in businesses using AI ethically at [42%, down from 58% in 2023](#).

78%

would rather see ads made by people, even if AI could make better ones (Canva)

68%

don't mind AI in advertising if it makes ads more helpful or relevant; rejection isn't absolute

9x

increase in "AI slop" mentions in media monitoring: 41% of marketing leaders call it a real challenge

There's a transparency paradox underneath: consumers say they want disclosure, but NIM's controlled study found that [labeling an ad as AI-generated triggered more critical evaluation of identical content](#): lower perceived usefulness, weaker purchase intent. The practical implication isn't to hide AI use (regulation now forbids that in the EU; see next section); it's that creative quality matters more, not less, when AI is in the production chain, and that attitudes toward the brand's AI use track attitudes toward AI generally.

09 · REGULATION & BRAND SAFETY

The disclosure era started nine days ago

On [August 2, 2026](#), the EU AI Act's Article 50 transparency obligations took effect, with fines up to €15 million or 3% of worldwide annual turnover. The rules apply to any company whose AI outputs reach EU audiences, [including organizations with no physical presence in Europe](#). Marketing teams should note three duties:

1 "Deep fake" labeling, broadly defined. Realistic AI-generated or AI-manipulated depictions of people, objects, places, or events that could falsely appear authentic must be disclosed; the Commission's July 20 guidelines make clear this covers [product shots, backgrounds, and human or non-human characters](#) in ads, far beyond the US sense of "deepfake."

2 AI-generated public-interest text. AI-written press releases and ad copy on matters of public interest require disclosure, [unless meaningful human review and editorial responsibility applies](#). A documented editorial process is the practical compliance path for most marketing content.

3 Chatbot and agent disclosure. AI systems interacting directly with people (chatbots, voice assistants, AI agents) must disclose they're AI unless it's already obvious, in a [clear and distinguishable manner at first interaction](#). (One provider-side duty, machine-readable marking for pre-existing GenAI systems, was deferred to December 2, 2026.)

Beyond compliance, the operational risks are familiar but sharpened: hallucinated claims and fabricated citations in published content, bias in generated creative, and data privacy; [35% of marketers name privacy and data security their top AI concern](#). The Google Bard demo error, which coincided with [a roughly \\$100B market-cap loss](#), remains the canonical cautionary tale for unreviewed AI output.

10 · MARKET OUTLOOK

Where the money and the forecasts point

Market-size estimates vary widely by definition, so treat ranges as directional. Grand View Research puts AI-in-marketing at [\\$35.0B in 2026, growing to \\$82.2B by 2030](#) (25% CAGR); the broader AI-for-sales-and-marketing category is sized at [\\$58B in 2025 reaching \\$240B by 2030](#) (MarketsandMarkets). Whichever definition you prefer, the direction is the same: mid-20s compound growth through the decade.

AI in marketing, global market size

Grand View Research · USD Billions



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Three developments to watch through 2027: consolidation of point tools into platform-native AI (the martech stack shrinking as suites absorb features); AI-mediated buying itself: [AI and agents drove 20% of global orders \(\\$262B\) during the 2024 holiday season](#), which makes optimizing for AI answer engines (AEO/GEO) a channel, not a tactic; and the governance shakeout, as the forecast cancellation wave separates teams with evaluation discipline from teams with subscriptions.

11 · IMPLEMENTATION ROADMAP

A 12-month path that avoids the failure statistics

The data above implies a sequence. Readiness precedes budget (the 21.3% spenders built capability first); pre-agreed metrics halve failure; human review is the production norm; and disclosure compliance is now table stakes for anything reaching EU audiences.

MONTHS 1-2 Baseline & governance

Audit current AI use (it's already happening informally). Set an acceptable-use and review policy, assign editorial responsibility, and map EU AI Act exposure. Agree success metrics with finance before any spend.

MONTHS 3-5 Two or three pilots

Start where reported ROI is highest and risk lowest: content drafting with human editing, and one demand-gen workflow (lead scoring or qualification). Measure against the pre-agreed baseline, not vibes.

MONTHS 6-9 Productionize what worked

Kill pilots that missed targets (fast abandonment beats slow bleed). Wire winners into the stack (CRM, analytics, attribution) and train the team on the workflows, not just the tools; skill gaps are the #1 leadership-cited barrier.

MONTHS 10-12 First agent, with guardrails

Pick one bounded, high-frequency decision workflow (bid management is the proven first case). Add evaluation, observability, and cost caps before launch, the disciplines that separate 11x returns from the 40% cancellation cohort.

SOURCES

Gartner 2026 CMO Spend Survey · May 11, 2026 · n=401

Digital Applied: AI marketing statistics compilation · Apr 2026

2026 (Salesforce, HubSpot, McKinsey, Gartner data)

Shno: AI adoption statistics (McKinsey maturity data) · 2026

Omnibound: marketing AI adoption data · Jun 2026

Unbound: agentic AI marketing statistics · May 2026

Konabayev: tool adoption & governance (Jasper, Zoominfo, Salesforce trust) · May 2026

AI Business Weekly (Duke CMO Survey data) · Jun 2026

BizIQ: ROI & spend data · Jun 2026

Starr Conspiracy: B2B AI ROI benchmarks · May 2026

Digital Applied: 250-agency agentic survey · Apr 26, 2026

Relify: agentic AI trends (Gartner, McKinsey projections) · Feb 2026

Lodhi: agentic ROI data (McKinsey, HubSpot) · Jul 2026

IAB: The AI Ad Gap Widens · Jan 15, 2026 · n=505

consumers · 104 executives

Canva State of Marketing & AI · May 13, 2026

Marketing Brew: Harris Poll / 4As / Inflation · Jun 24, 2026

NIM: Transparency Without Trust (labeling study)

Cooley: EU AI Act transparency obligations · Aug 3, 2026

Davis+Gilbert: AI disclosure rules for advertisers · Jul 2026

Standby: Article 50 rules, scope, timeline · Jul 2026

Grand View Research: AI in marketing market · 2025-2030

forecast

MarketsandMarkets: AI for sales & marketing · 2025-2030

Coupler.io: AI use cases (JPMorgan CTR case) · Jul 2026

GoGloby: production AI deployments · Jun 2026

Contentu: GenAI use cases, risk & ROI · Dec 2025

Compiled August 11, 2026 by Emulent. Most ROI and productivity figures are practitioner-reported survey data rather than controlled experiments, and are labeled as such where the distinction matters; case-study numbers are illustrative single-organization results, not benchmarks. Survey editions and field dates are noted inline. This report is informational and not legal advice; consult counsel on EU AI Act exposure.