

State of Demand Gen

September 2026

Actions and insights for the year ahead



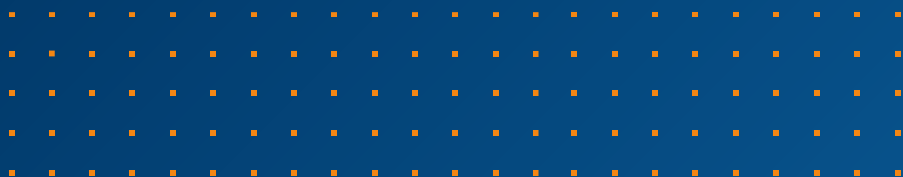
What's Inside

- Key Takeaways
- Budget & Demand Gen Expectations
- Measurement & Challenges
- Topics, Tech & Tactics
- Content That Performs
- Artificial Intelligence
- Lead Follow-up & Qualification



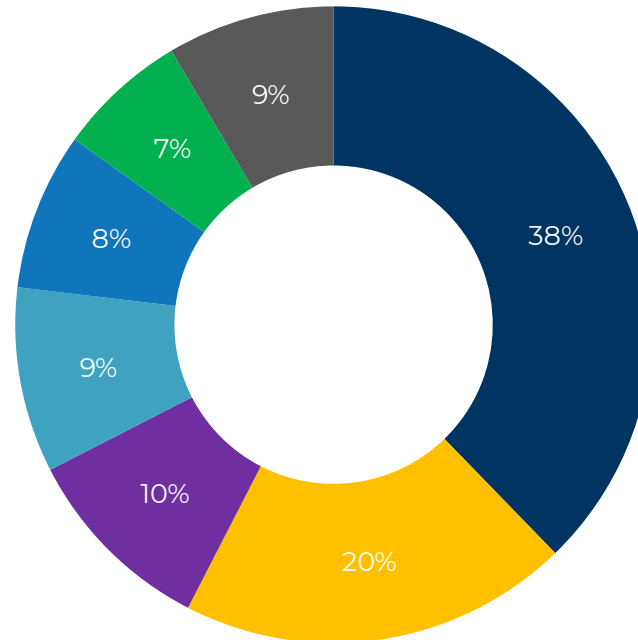
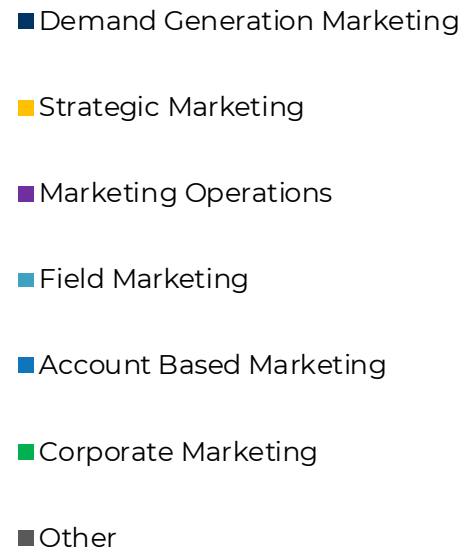
Key Takeaways

- **Budget optimism is back**, climbing across every company size
- **Cost-center thinking is fading**, as demand gen gains greater strategic weight
- **Sourcing new pipeline remains** the top KPI defining demand gen success
- **AI adoption is advancing** beyond content into journey mapping and revenue forecasting
- **BDRs and AI are sharing** the lead qualification workload
- **ABM signals and needs-based account information** are most important to Sales teams



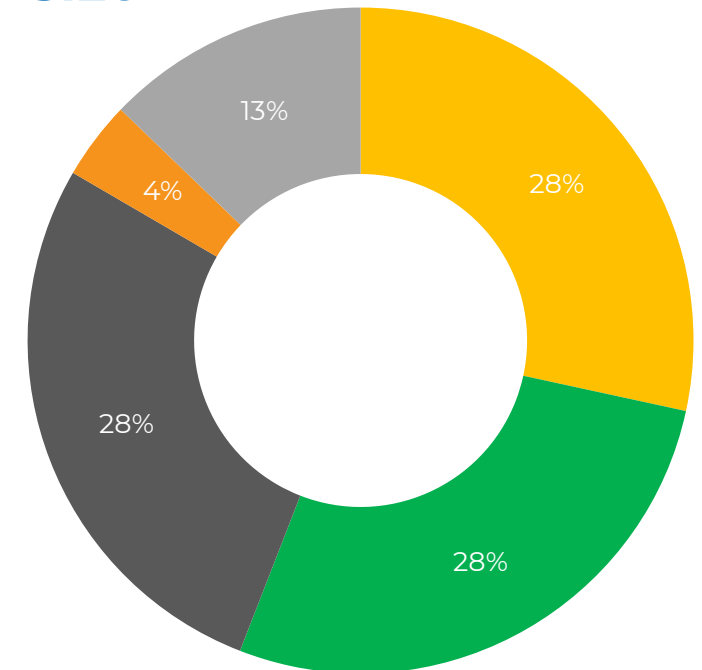
Respondent Demographics

Department



212 qualified demand-gen and tech marketer respondents

Company Size



78% of respondents were from North America (US and Canada)

A photograph of three business professionals (two men and one woman) sitting around a wooden table in a modern office. They are looking at a laptop and several documents with charts and graphs. A large window in the background shows a city skyline. A blue overlay box is on the right side of the image, containing the title and subtitle. A solid orange rectangle is at the bottom center.

Budget & Demand Gen Expectations

State of Demand Gen 2026

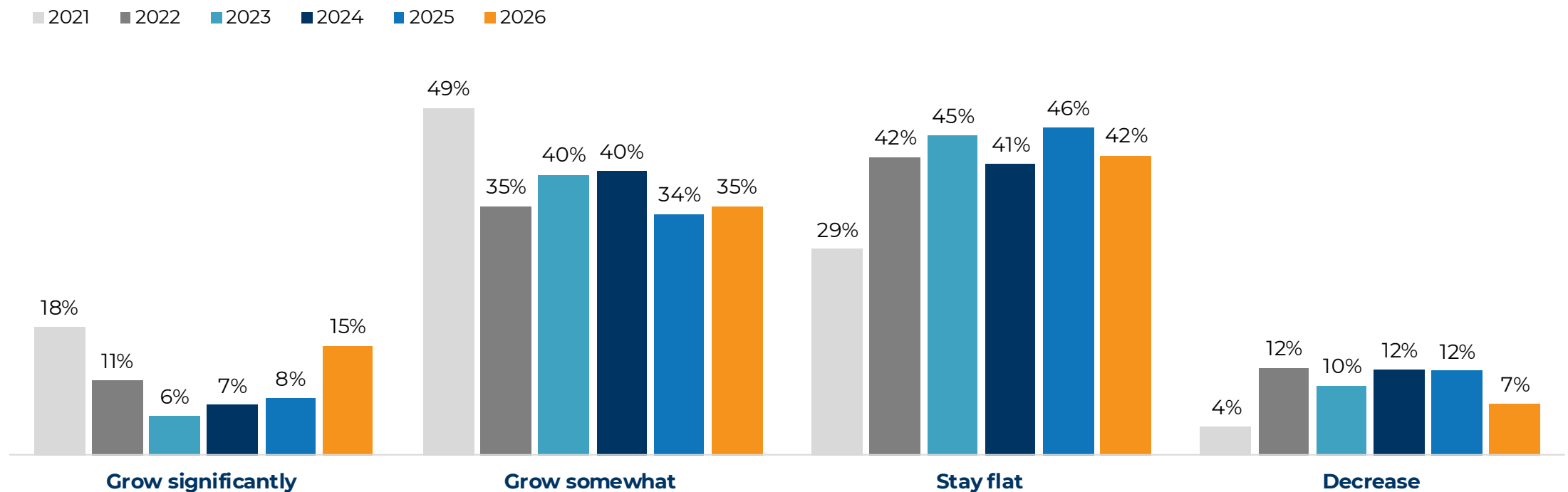
Budget optimism is on the rise

QUESTION

In the next 12 months, how do you expect your demand generation budgets to change?

TAKEAWAY

Budgets are growing again, with 2026 marking the strongest growth outlook since 2021.



Enterprise companies more optimistic this year

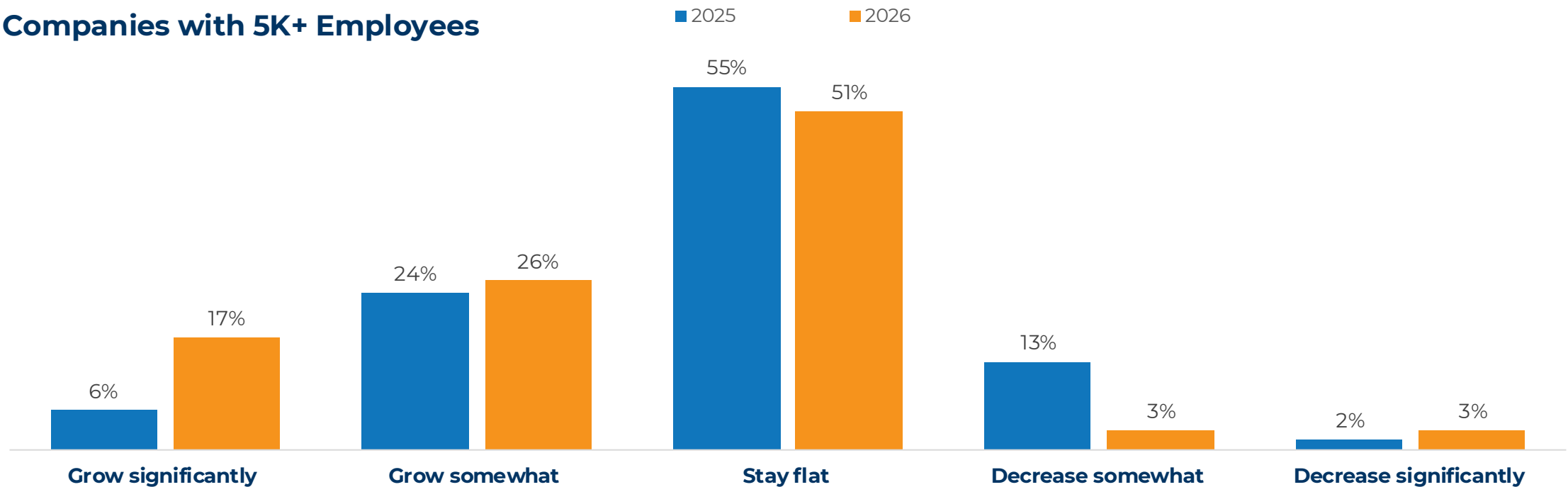
QUESTION

In the next 12 months, how do you expect your demand generation budgets to change?

TAKEAWAY

Large companies caught the optimism bug this year, as budget growth expectations spiked sharply over 2025 projections.

Companies with 5K+ Employees



Smaller companies double down on optimism

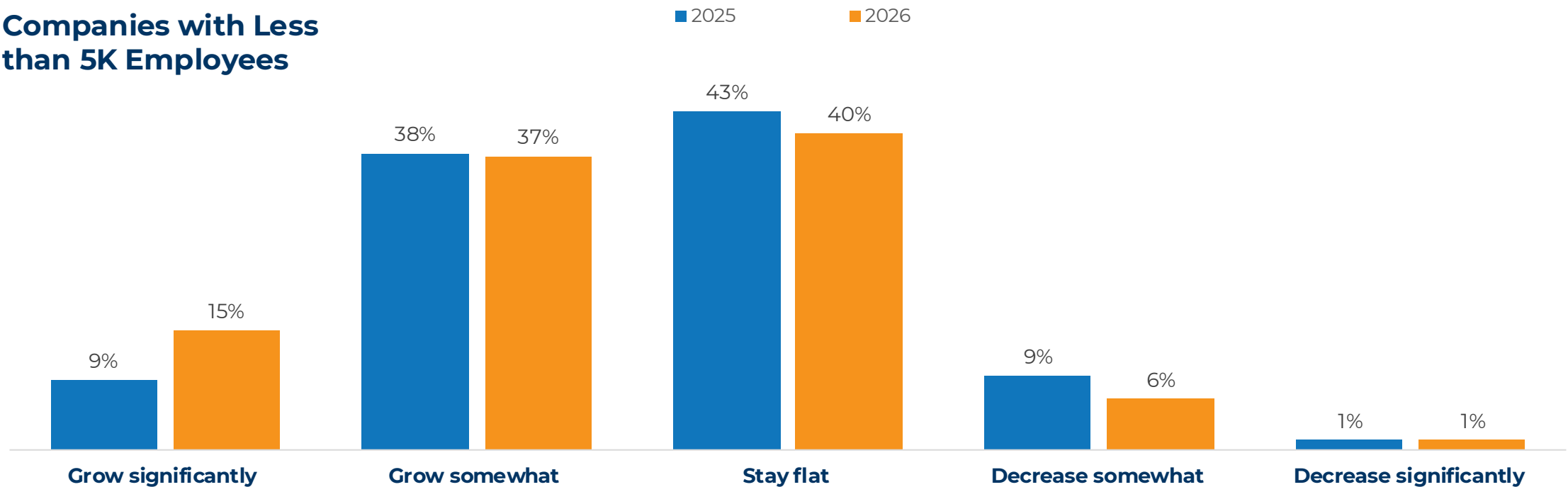
QUESTION

In the next 12 months, how do you expect your demand generation budgets to change?

TAKEAWAY

Smaller companies keep compounding their optimism; growth expectations rose again on top of an already strong base.

Companies with Less than 5K Employees



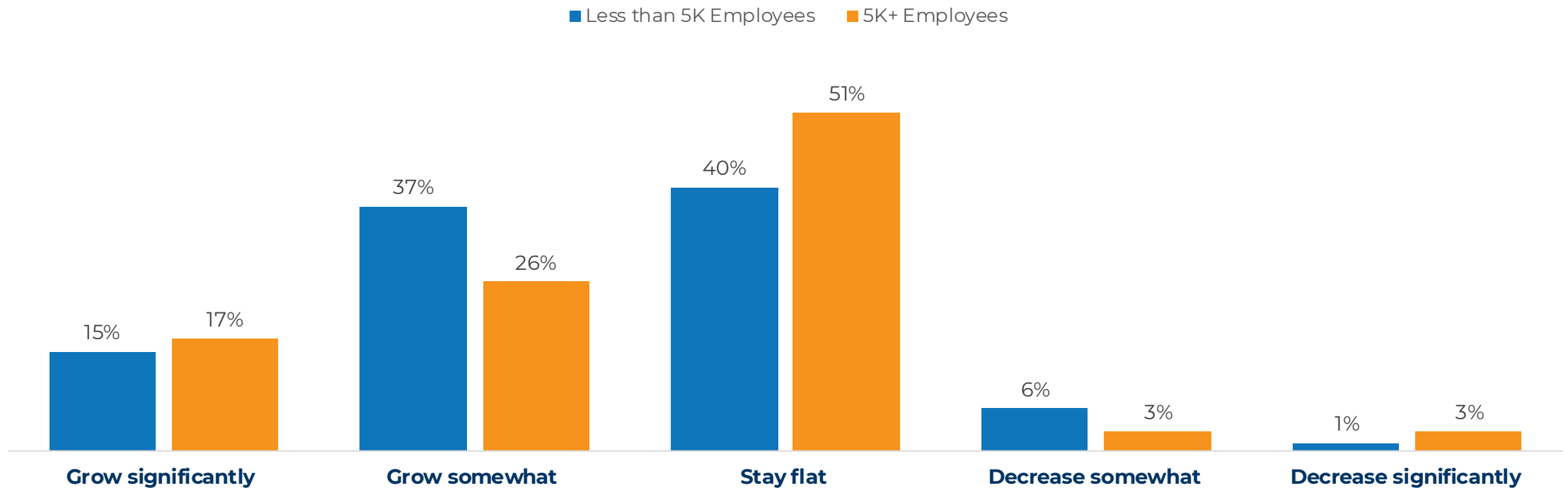
Positive outlook across company size

QUESTION

In the next 12 months, how do you expect your demand generation budgets to change?

TAKEAWAY

Overall, the market is feeling bullish, with the vast majority of respondents betting on stable to higher budgets.



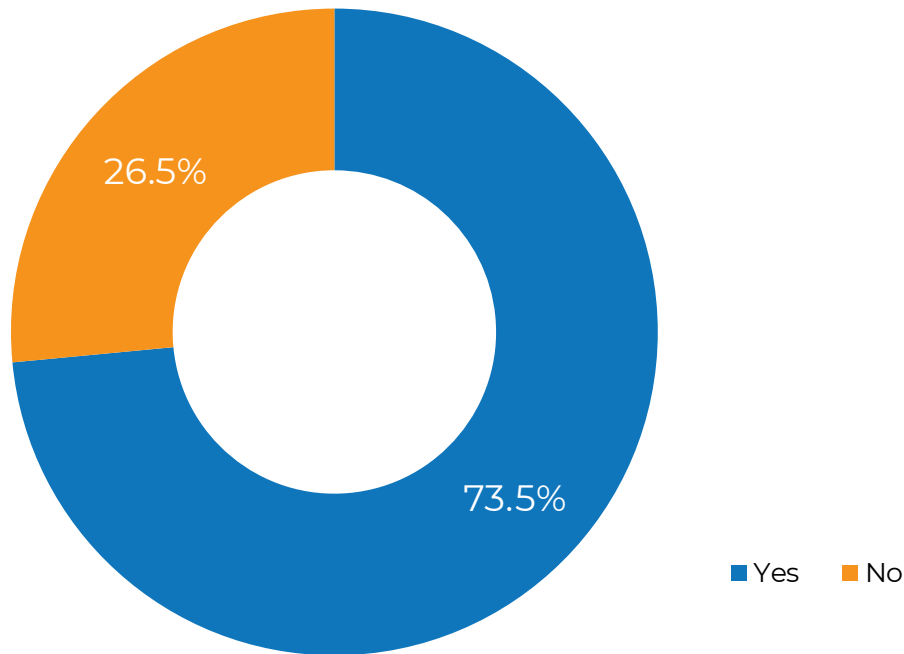
Goals reached, budget or not

QUESTION

Did you beat your demand generation goals last year?

TAKEAWAY

Nearly 3 in 4 companies hit their demand gen goals last year, despite budget worries and belt tightening.



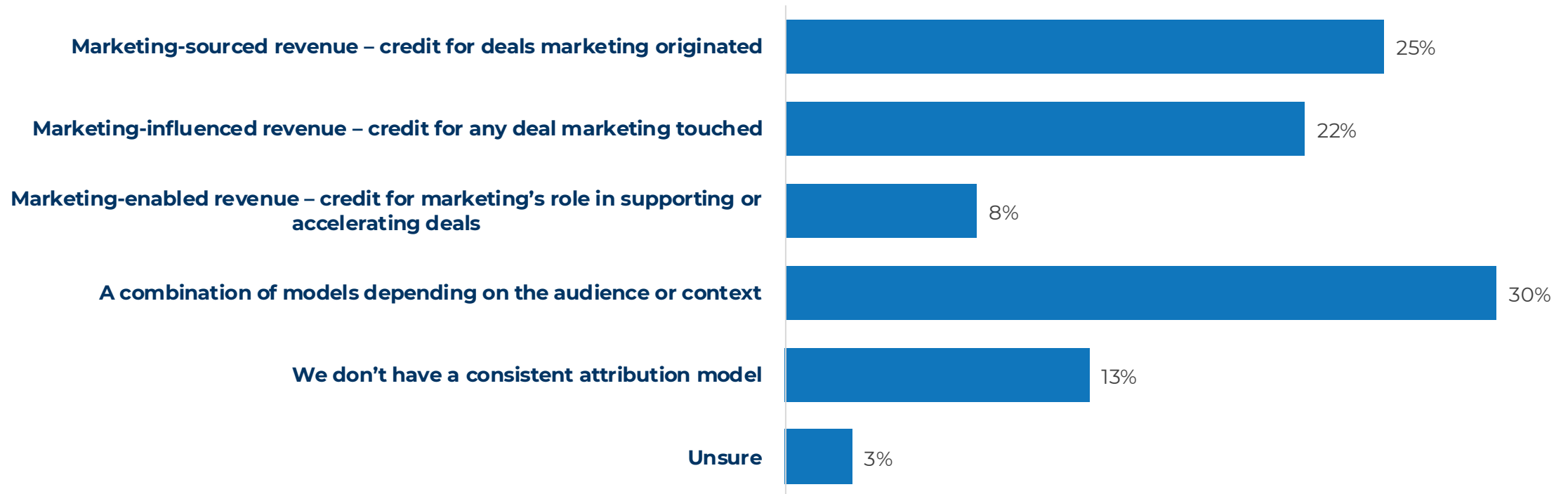
Attribution models are still up for grabs

QUESTION

Which revenue attribution model does your leadership primarily use to evaluate your demand generation team's performance?

TAKEAWAY

Marketing attribution remains a patchwork, no single model owns even a third of the market.



Cost-center thinking is no more

QUESTION

How does leadership perceive your demand generation efforts?

TAKEAWAY

Most leaders now call demand gen a strategic partner.

Viewed as essential to the company's growth and closely integrated with management strategies

19%

Considered a strategic partner with significant contributions

37%

Recognized for efforts but not seen as a key driver of revenue impact

35%

Seen as a cost center with limited impact

9%

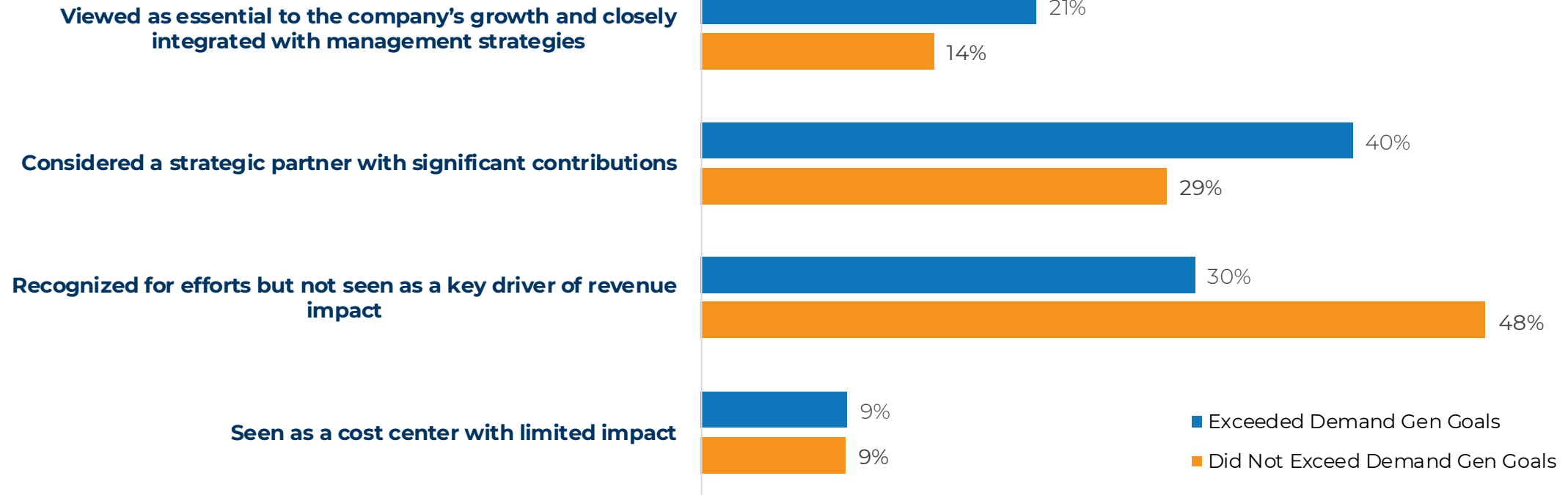
Essential and strategic delivers real edge

QUESTION

How does leadership perceive your demand generation efforts?

TAKEAWAY

Calling demand gen essential and strategic isn't just flattery, it tracks with a real edge in hitting goals.





Measurement & Challenges

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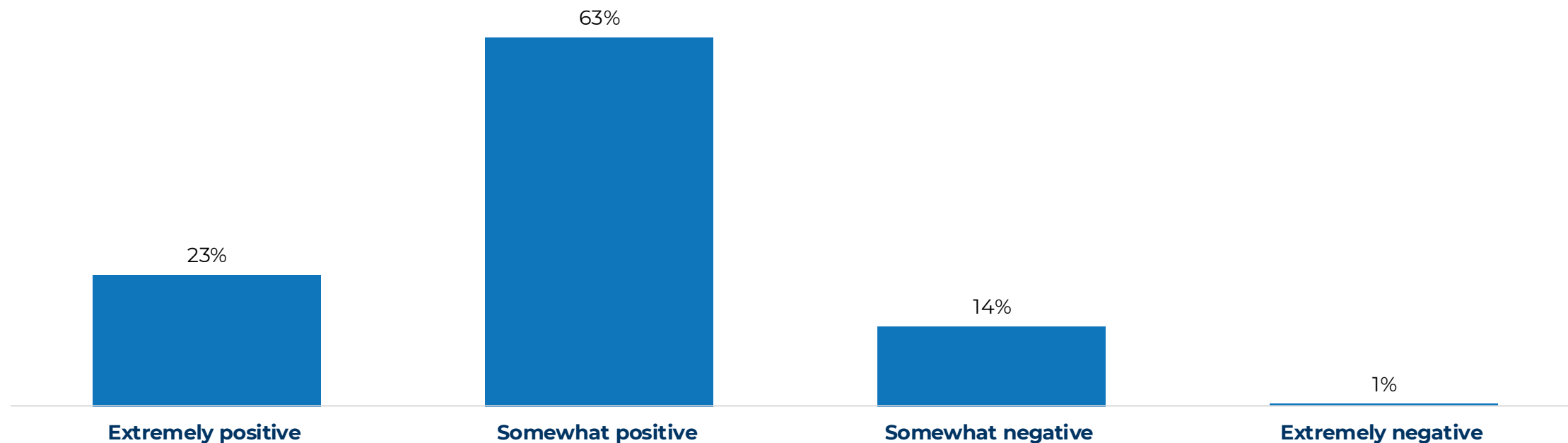
KPI confidence running high for next year

QUESTION

Which best describes your outlook on meeting or exceeding your team's most important KPIs in the coming year?

TAKEAWAY

KPI confidence is running high heading into next year.



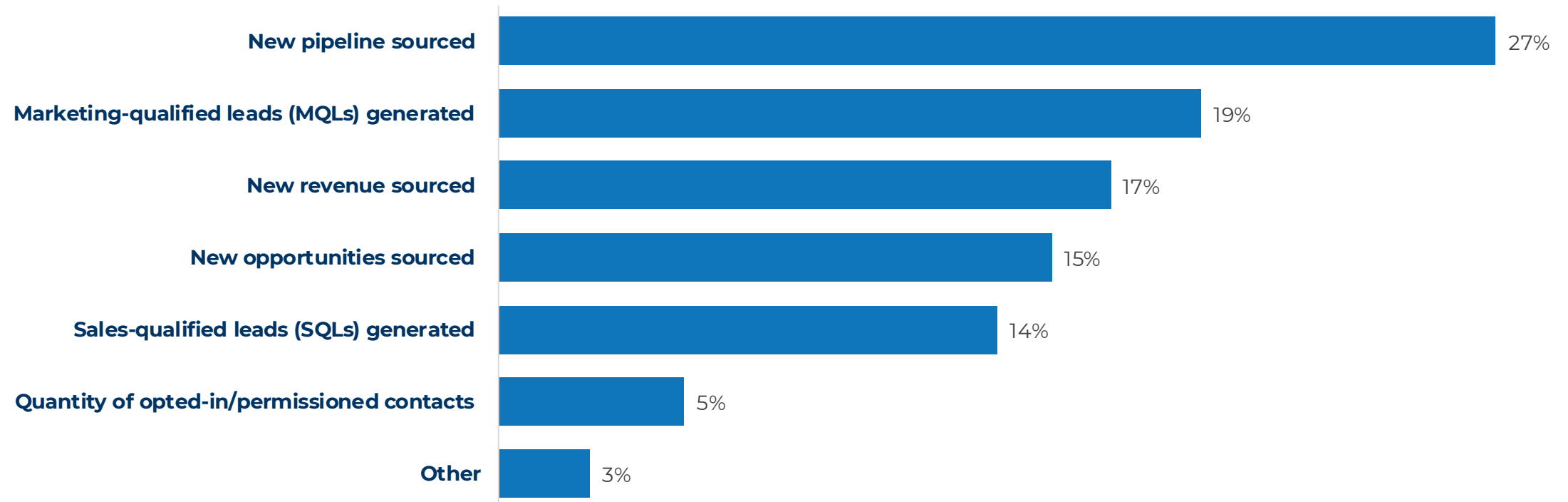
Pipeline, lead progression top success measures

QUESTION

Which of the following most closely describes how you define demand generation campaign success?

TAKEAWAY

Sourcing new pipeline and progressing leads and inquiries to MQL stage top the list of success measures.



Audience, accuracy, account info top partner priorities

QUESTION

Which of the following capabilities are most important to you when evaluating a content syndication partner? (Select up to 3)

TAKEAWAY

Marketers rank audience scale, data accuracy, account- and lead-level details as most important.



Topics, Tech & Tactics

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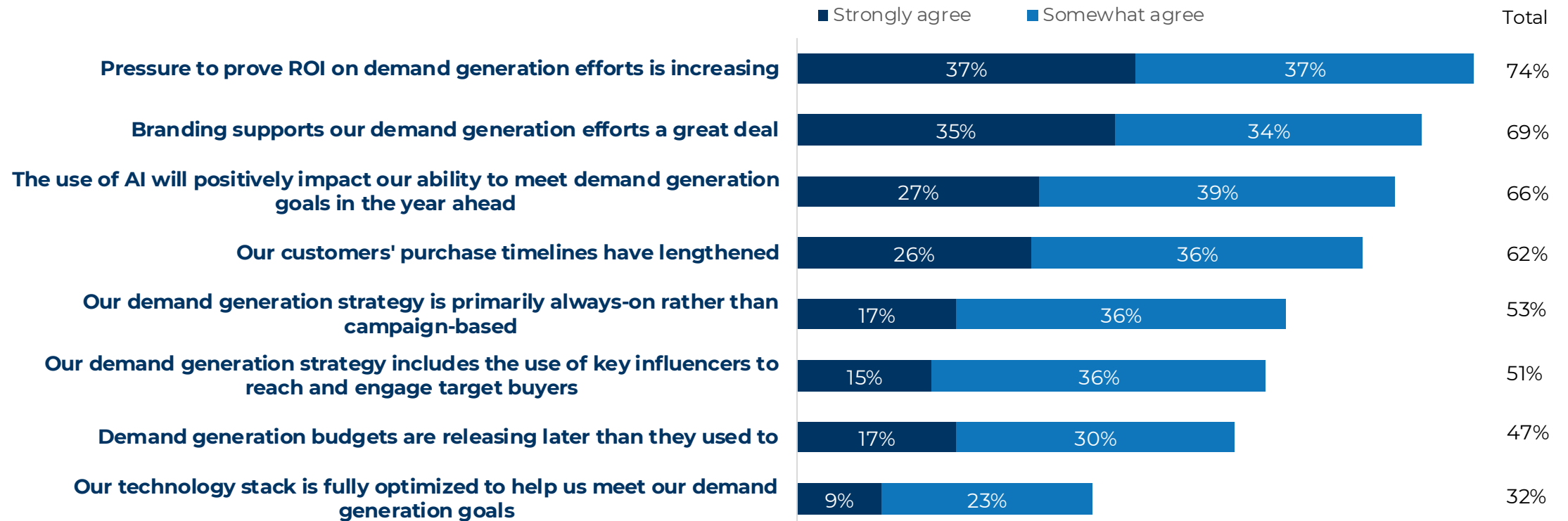
Pressure is the new normal, but the gap is closing

QUESTION

To what extent do you agree or disagree with the following statements?

TAKEAWAY

ROI pressure still tops the list, but branding and AI usage are closing the gap compared to last year.



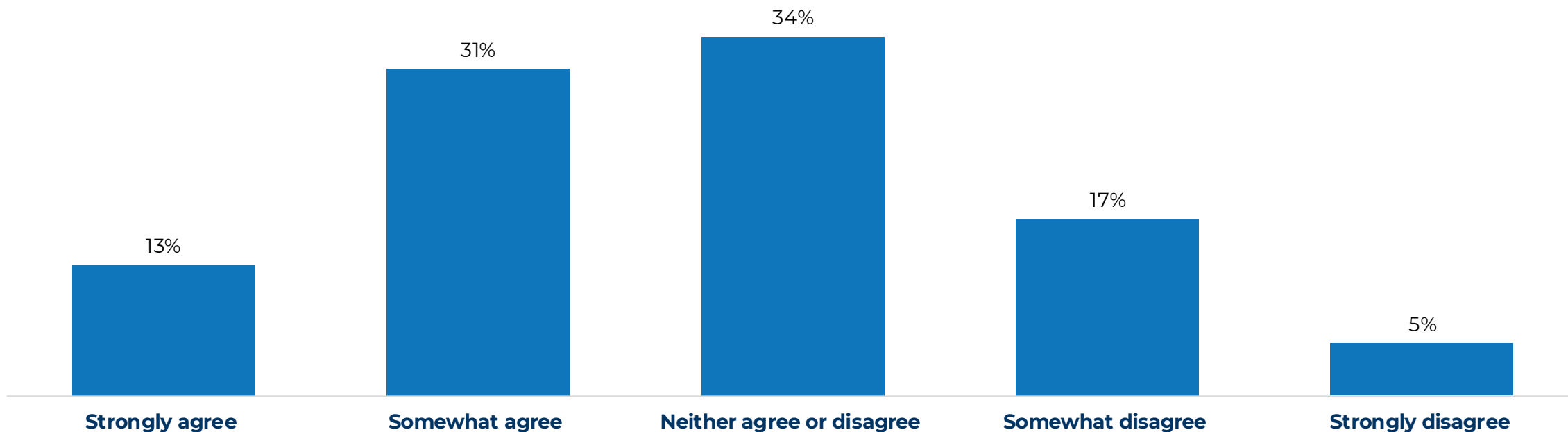
Trust in 3rd-party intent data has fallen

QUESTION

To what extent do you agree or disagree with the following statements? *"The reliability of intent data has declined over the past 12 months."*

TAKEAWAY

Trust in 3rd-party intent data hanging in the balance; more marketers are losing faith than gaining it.



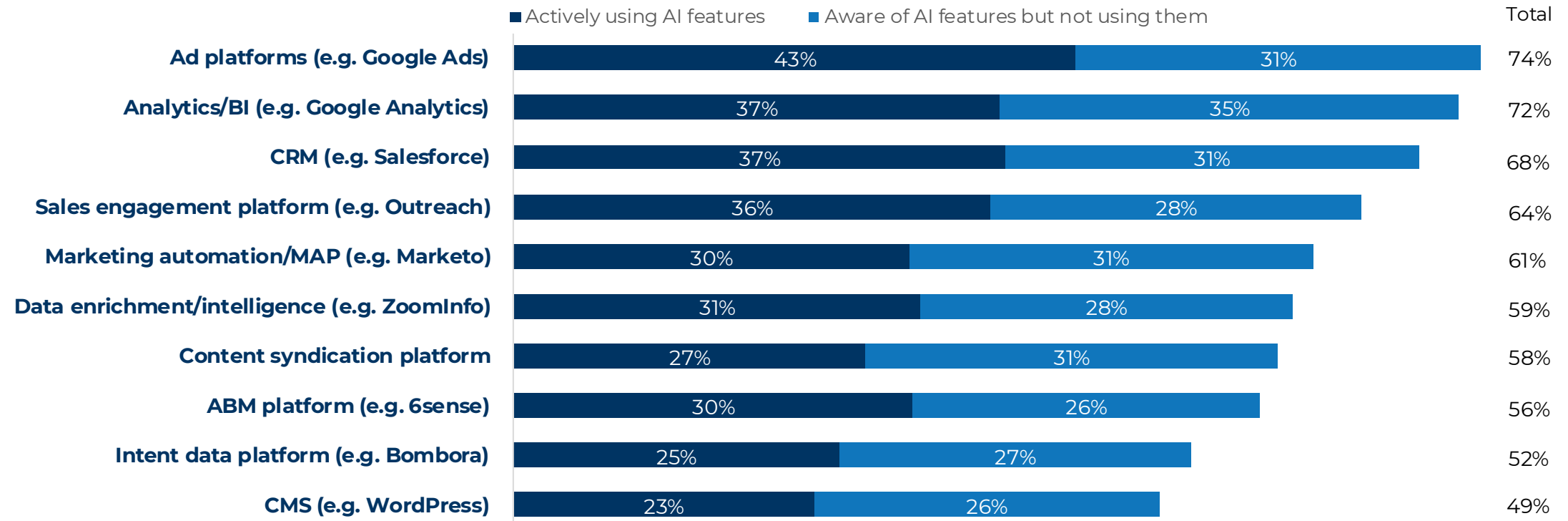
High awareness of AI features, average-to-good adoption

QUESTION

For each of the following tools or platforms in your technology stack, please indicate your use of their AI features.

TAKEAWAY

While feature awareness clears 50% across almost the entire stack, active use hovers at just half that level, showing teams remain in an adoption phase.



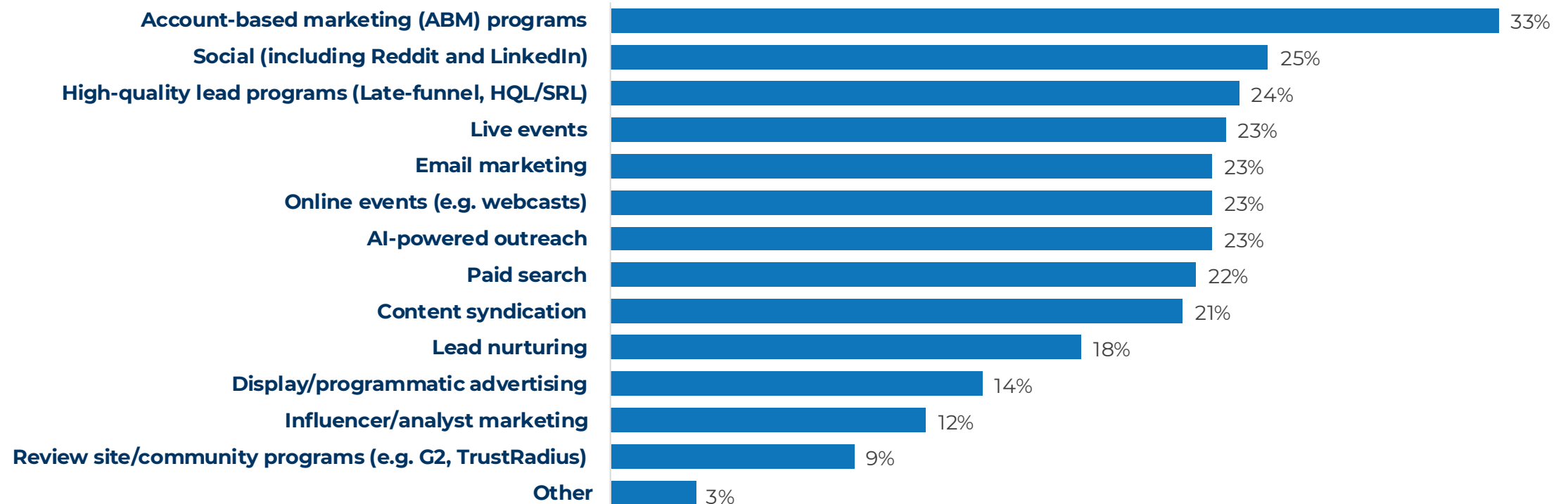
ABM programs led the pack last year

QUESTION

Thinking about 2025, which demand generation tactics/channels did you increase the most?
(Select up to 3)

TAKEAWAY

ABM program growth leapfrogged prior year darlings: Social and Paid Search.



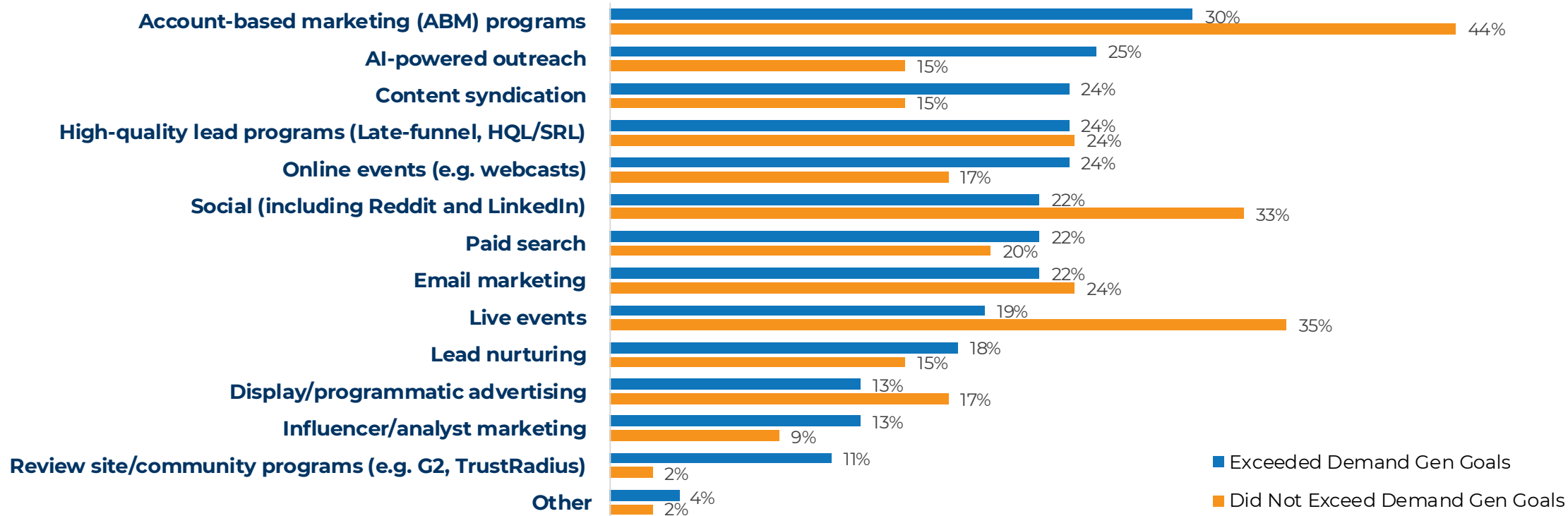
Those who beat goals diversified their strategy

QUESTION

Thinking about 2025, which demand generation tactics/channels did you increase the most?
(Select up to 3)

TAKEAWAY

Marketers who beat goals focused more on demand gen, digital events, and automation, hat tip to review sites/social proof.



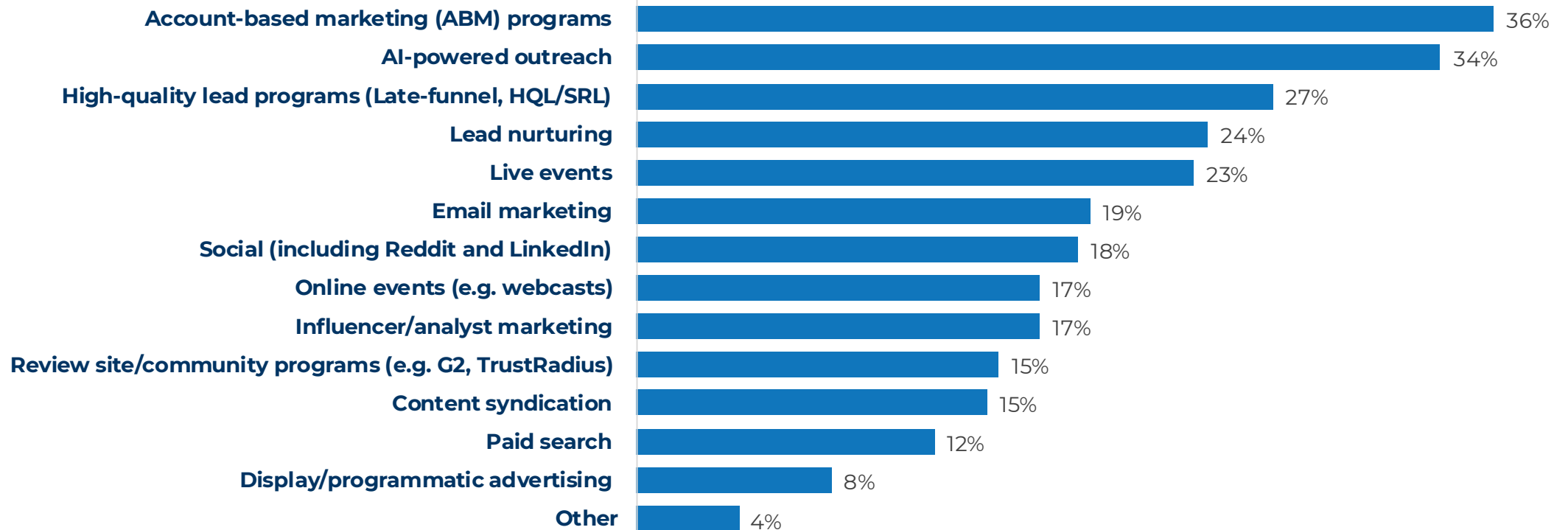
ABM, AI, late-funnel programs are next year's bets

QUESTION

In the coming 12 months, which demand generation tactics/channels do you expect to increase the most? (Select up to 3)

TAKEAWAY

ABM and AI outreach are the two bets being made for next year, as are late-funnel (HQL/SRL) programs.



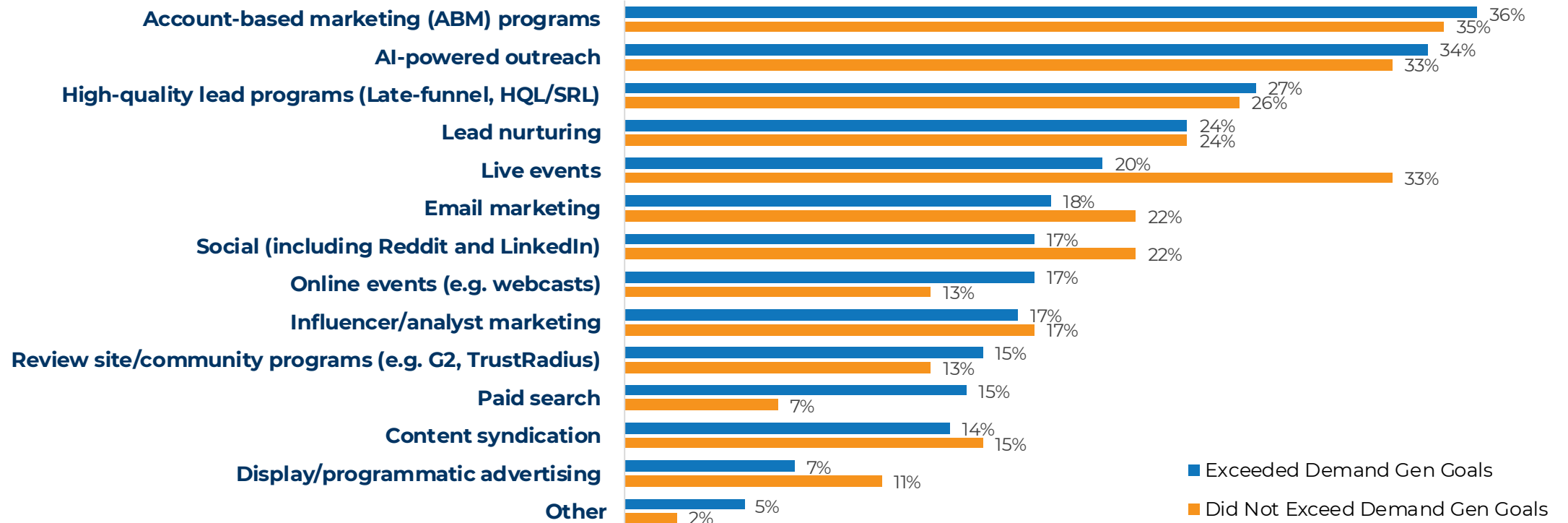
Channel, not quality, divides winners

QUESTION

In the coming 12 months, which demand generation tactics/channels do you expect to increase the most? (Select up to 3)

TAKEAWAY

Lead quality isn't the divide, channel is: paid search and digital events versus live events and branding.



B2B
Marketing
Growth
Summit

Strategy.
Connections.
What's Next.

Turning Interest Into Action

How B2B marketers can drive
greater pipeline in a changing
buying landscape.

Content that Performs

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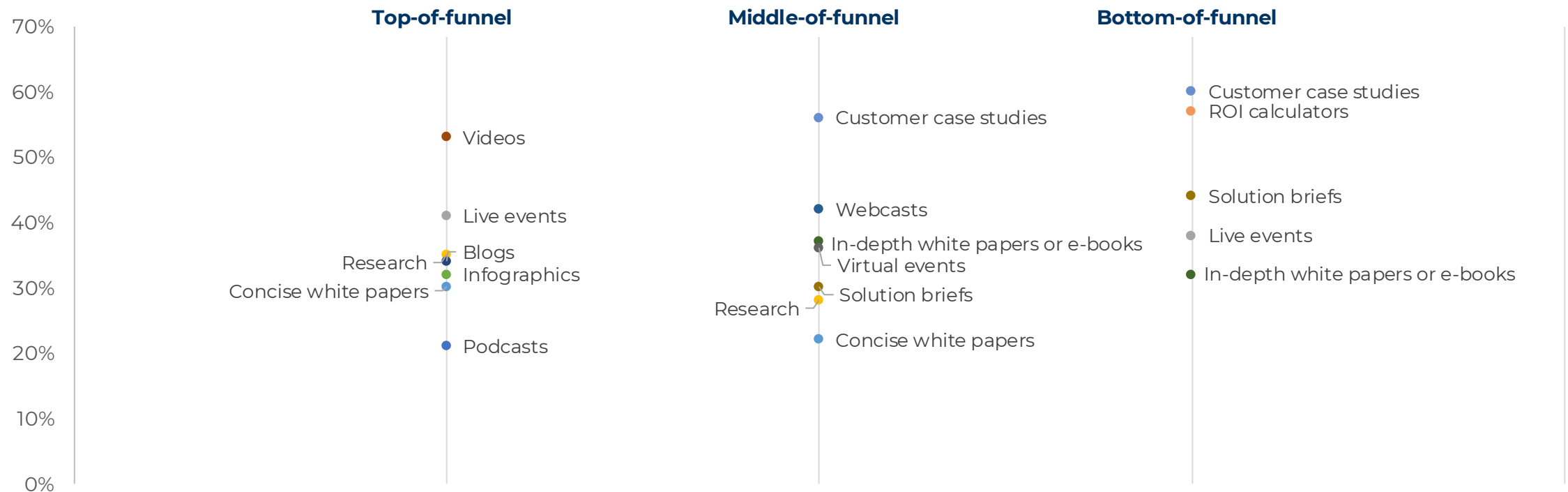
Case studies continue to do double duty

QUESTION

Which content types do you find to be most effective at the top-of-funnel / middle-of-funnel / bottom-of-funnel (BOF)? (Select up to 3)

TAKEAWAY

Customer case studies are doing double duty, topping both middle- and bottom-of-funnel picks for most effective.



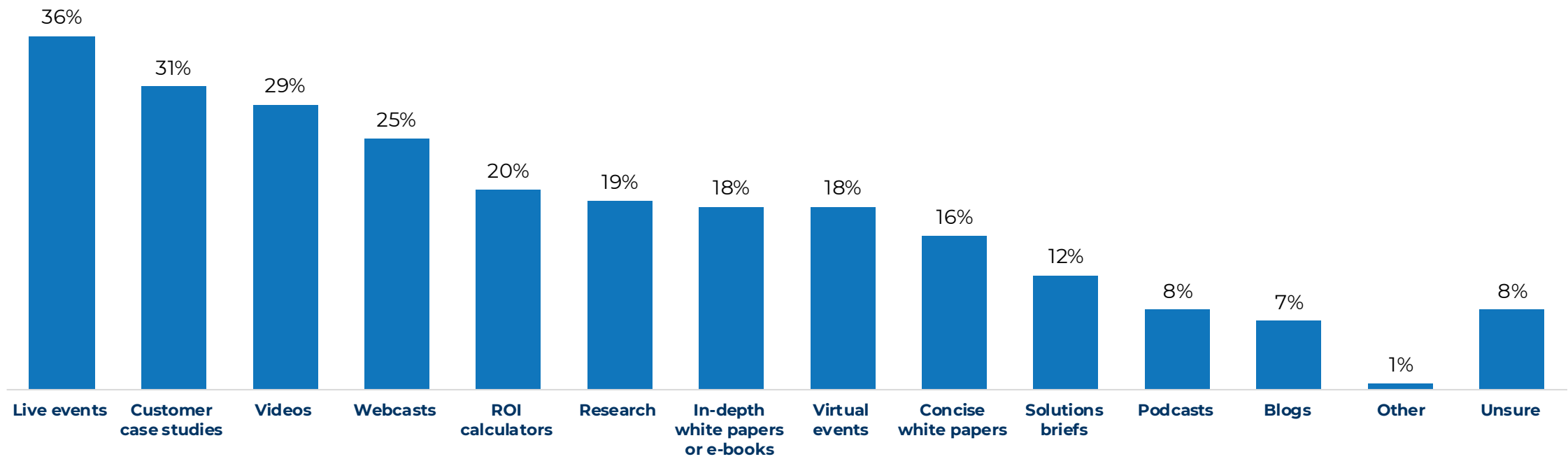
Live events, case studies rule ROI

QUESTION

In your opinion, which content types deliver the highest ROI overall? (Select up to 3)

TAKEAWAY

Live events and case studies appear to remain the ROI heavyweights.



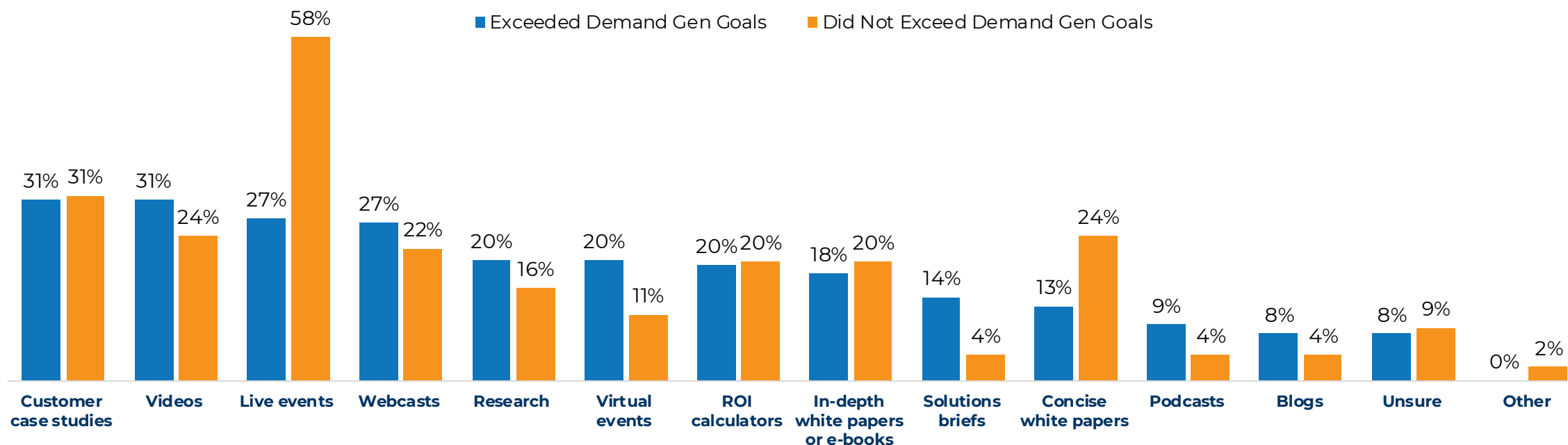
Live events split the room

QUESTION

In your opinion, which content types deliver the highest ROI overall? (Select up to 3)

TAKEAWAY

Is execution the deciding factor? Virtual events and proof-based content delivering for those who beat goals.





Artificial Intelligence

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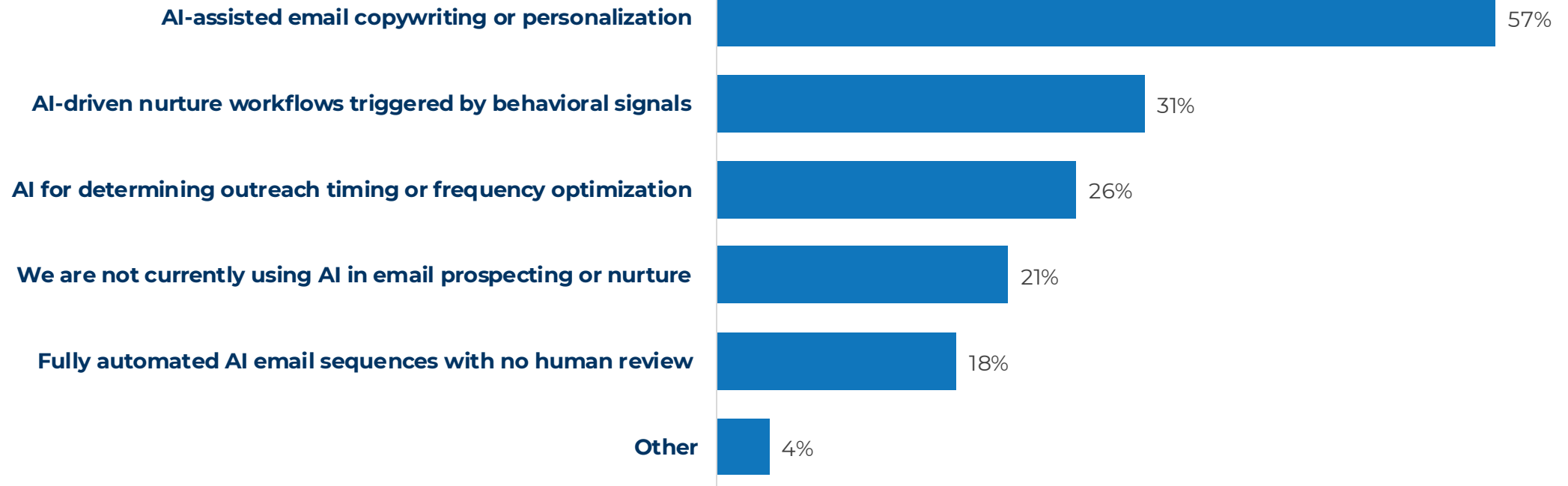
AI is more pervasive

QUESTION

How is your organization currently using AI in email-based prospecting or lead nurture?
(Select all that apply)

TAKEAWAY

AI still mostly a copywriting tool for email but becoming more utilized in outbound email workflows.



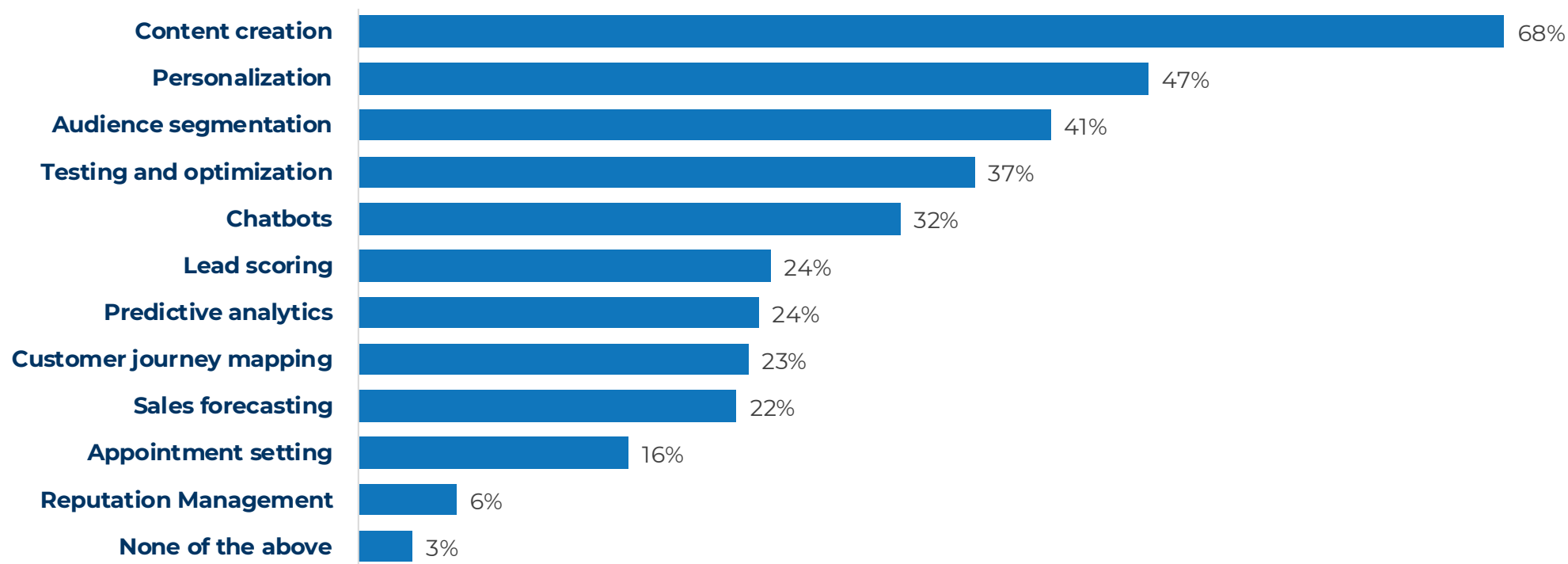
AI use is expanding beyond content

QUESTION

In the past 12 months, have you increased your use of AI in any of the following areas?
(Select all that apply)

TAKEAWAY

AI is moving beyond content creation to create value in key content strategy areas for marketers.



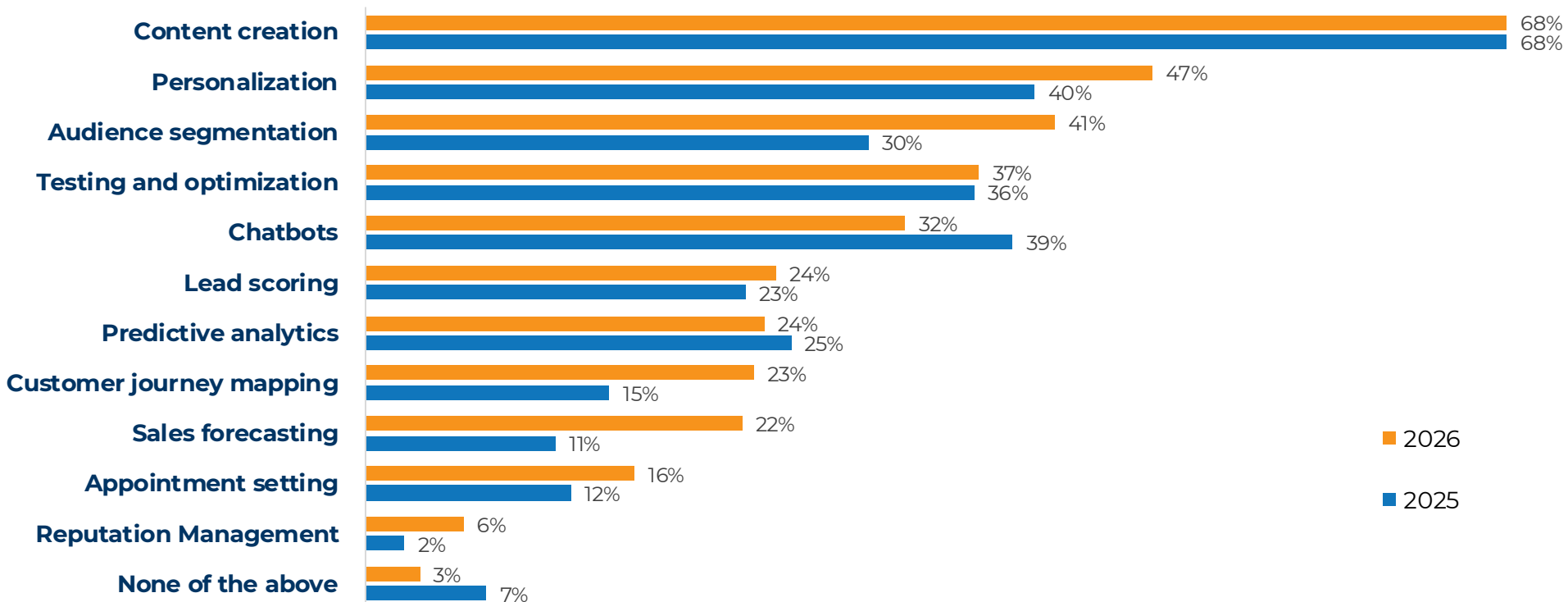
AI use is expanding beyond content

QUESTION

In the past 12 months, have you increased your use of AI in any of the following areas?
(Select all that apply)

TAKEAWAY

Content creation is plateauing; AI adoption is moving into audience segmentation, journey mapping, and sales forecasting.



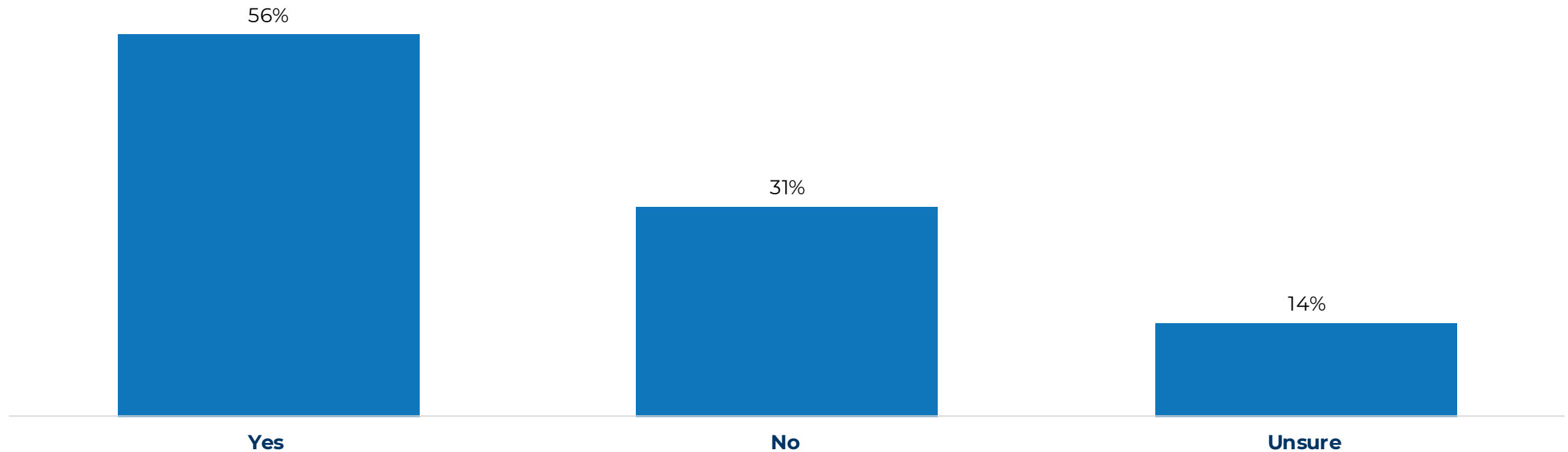
Automated lead scoring goes mainstream

QUESTION

Are you using AI or machine learning to score leads from your demand generation efforts?

TAKEAWAY

AI and Machine Learning lead scoring has crossed the tipping point; more companies use it than don't.



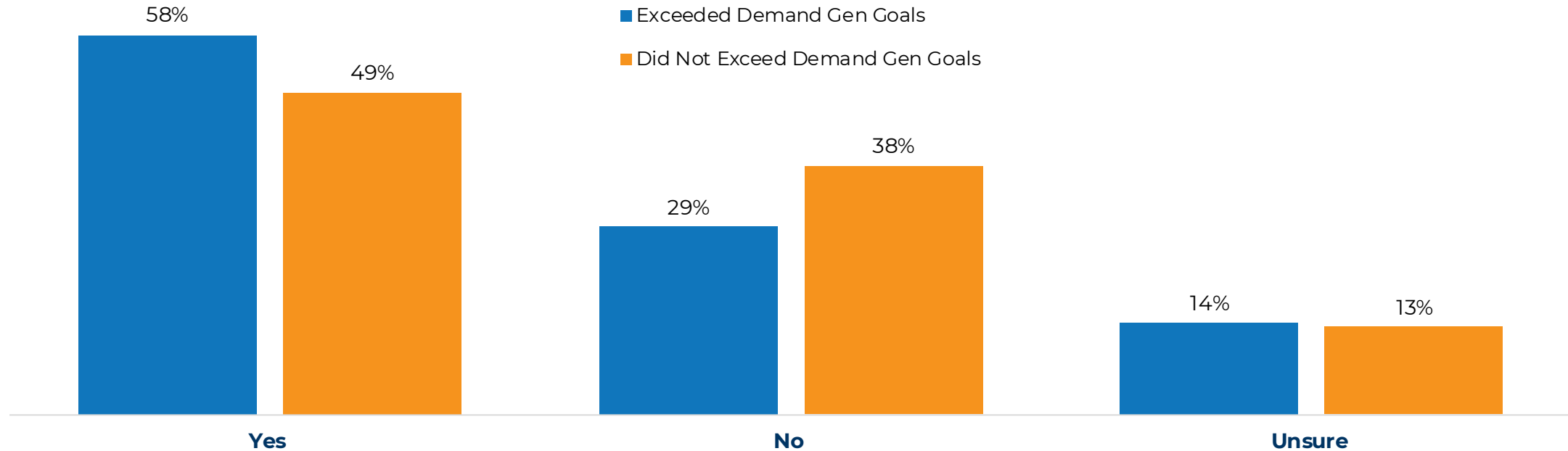
Automation adopters pull ahead

QUESTION

Are you using AI or machine learning to score leads from your demand generation efforts?

TAKEAWAY

Automation adopters are pulling ahead; lead scoring adoption tracks with hitting goals.



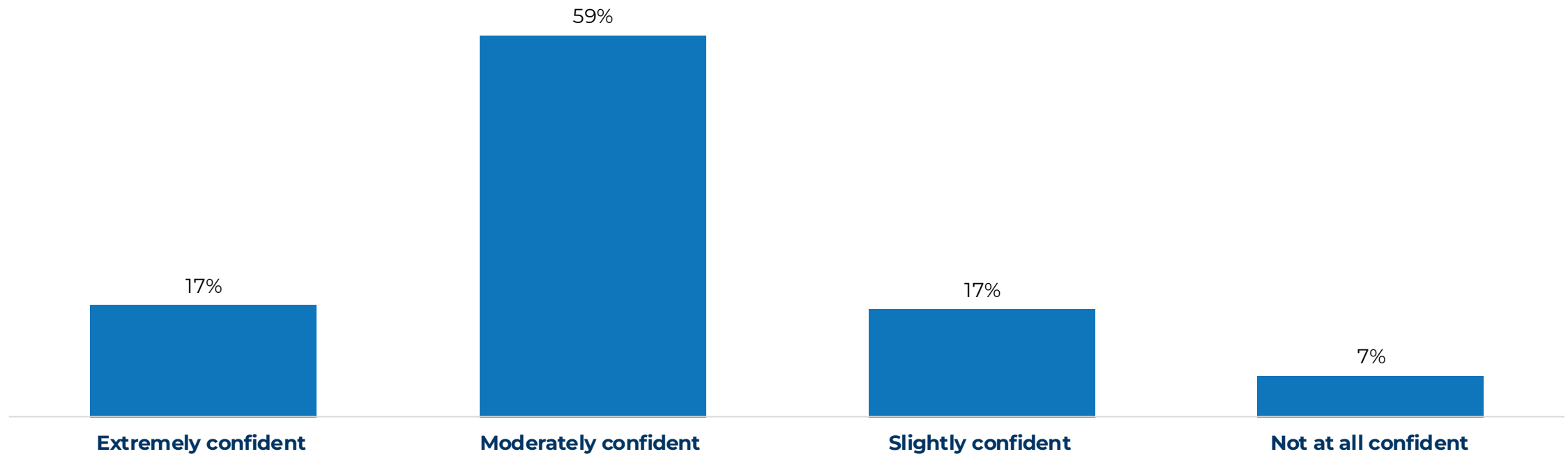
Confidence in lead scoring still a mixed bag

QUESTION

How confident are you in the current approach to scoring leads from demand generation efforts?

TAKEAWAY

Some marketers confident they've cracked the code, but still a work in progress for most.



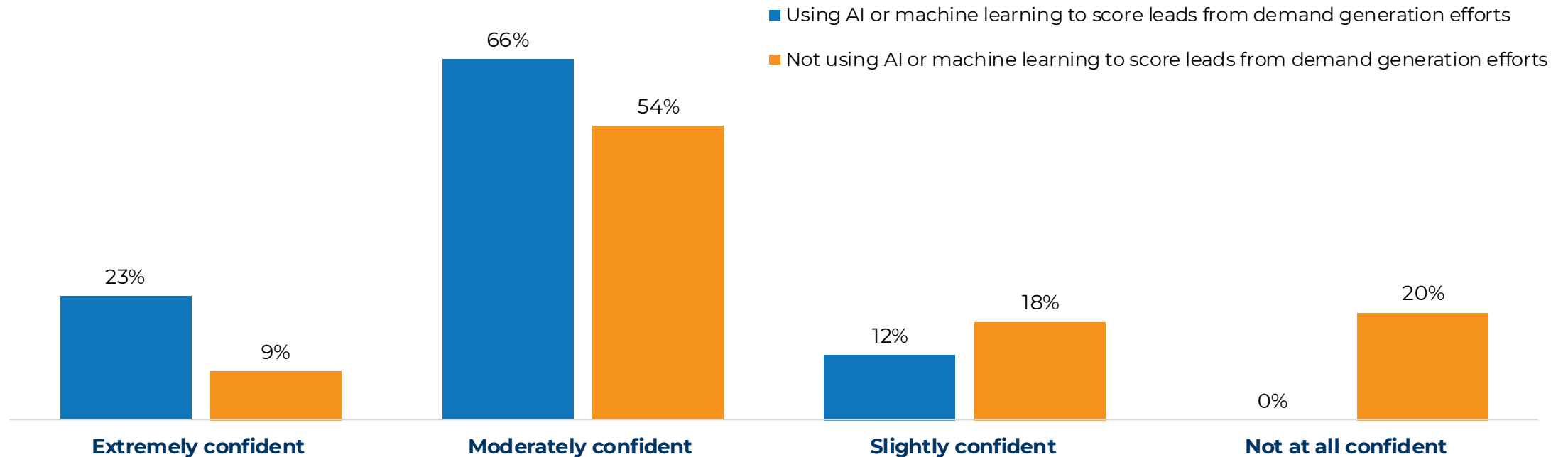
Confidence in lead scoring still a mixed bag

QUESTION

How confident are you in the current approach to scoring leads from demand generation efforts?

TAKEAWAY

Adopters trust automated scoring far more than those who haven't yet taken the leap.





Lead Follow-up & Qualification

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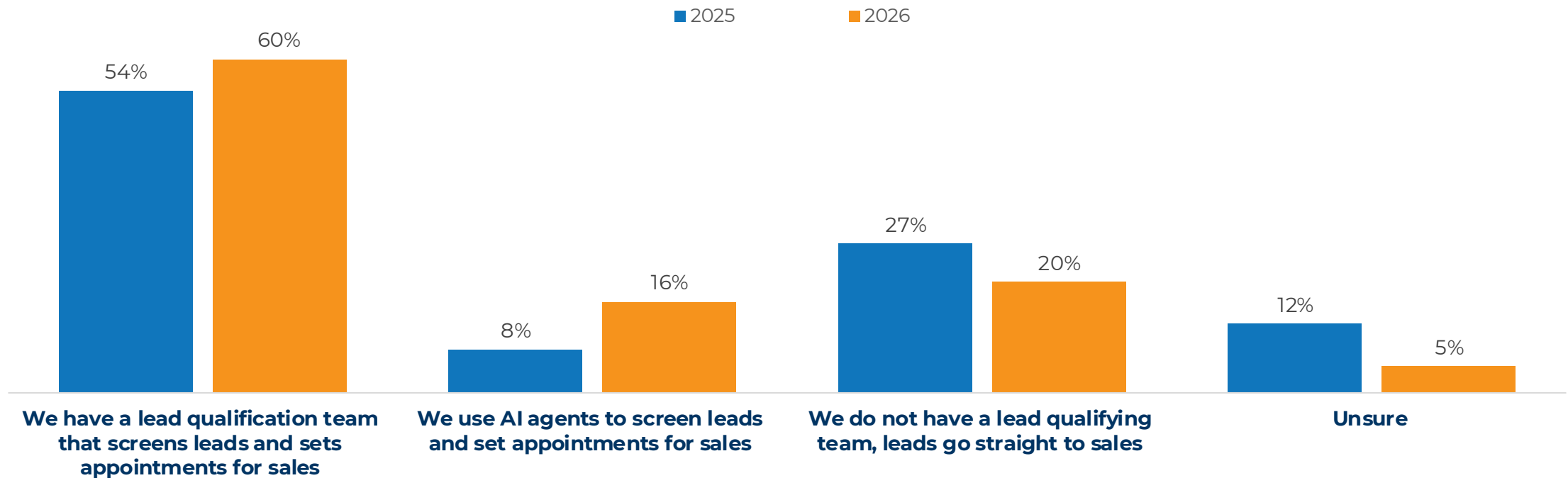
BDRs go high-tech

QUESTION

When thinking about telephone outreach to leads, which of the following best describes your organization's approach?

TAKEAWAY

BDRs are going high-tech; AI agents screening leads and setting appointments for Sales doubled this year.



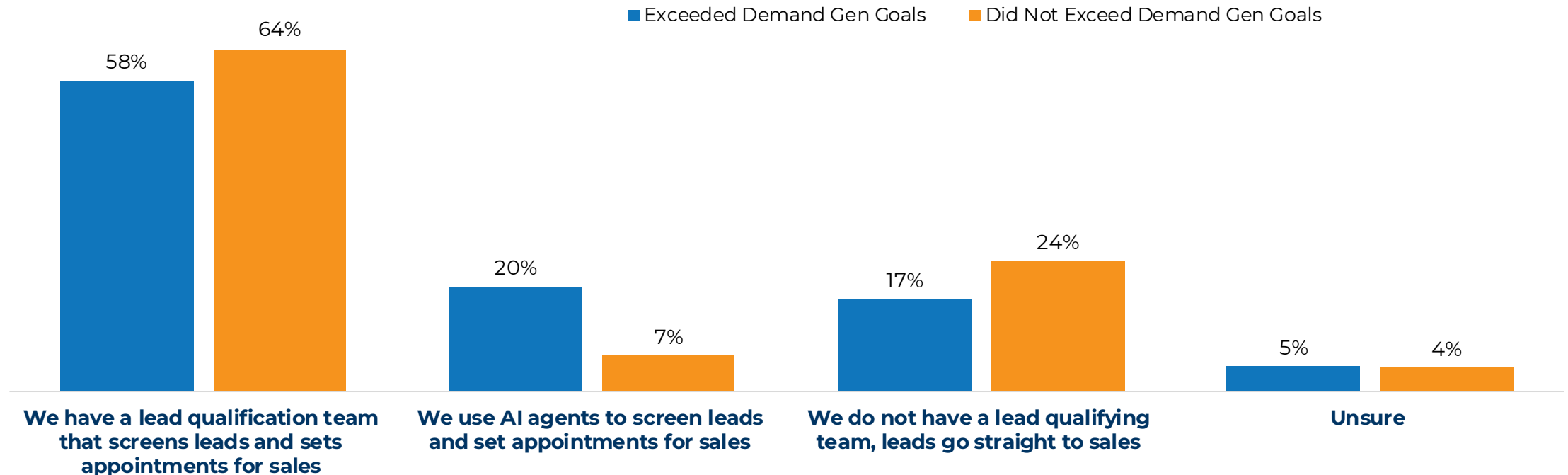
Winners are moving faster on AI agents

QUESTION

When thinking about telephone outreach to leads, which of the following best describes your organization's approach?

TAKEAWAY

Marketers who beat goals experiment with AI agents to screen and set more so than others.



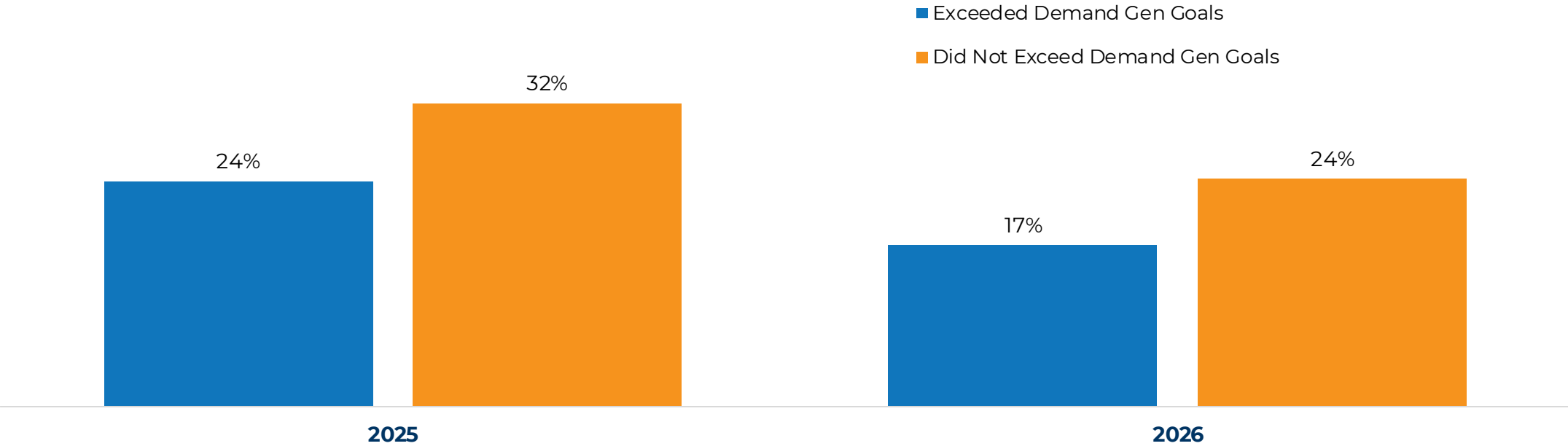
Skipping lead qualification is falling out of favor

QUESTION

When thinking about telephone outreach to leads, which of the following best describes your organization's approach? *"We do not have a lead qualifying team, leads go straight to sales."*

TAKEAWAY

Skipping lead qualification is falling out of favor for marketers, broadly.



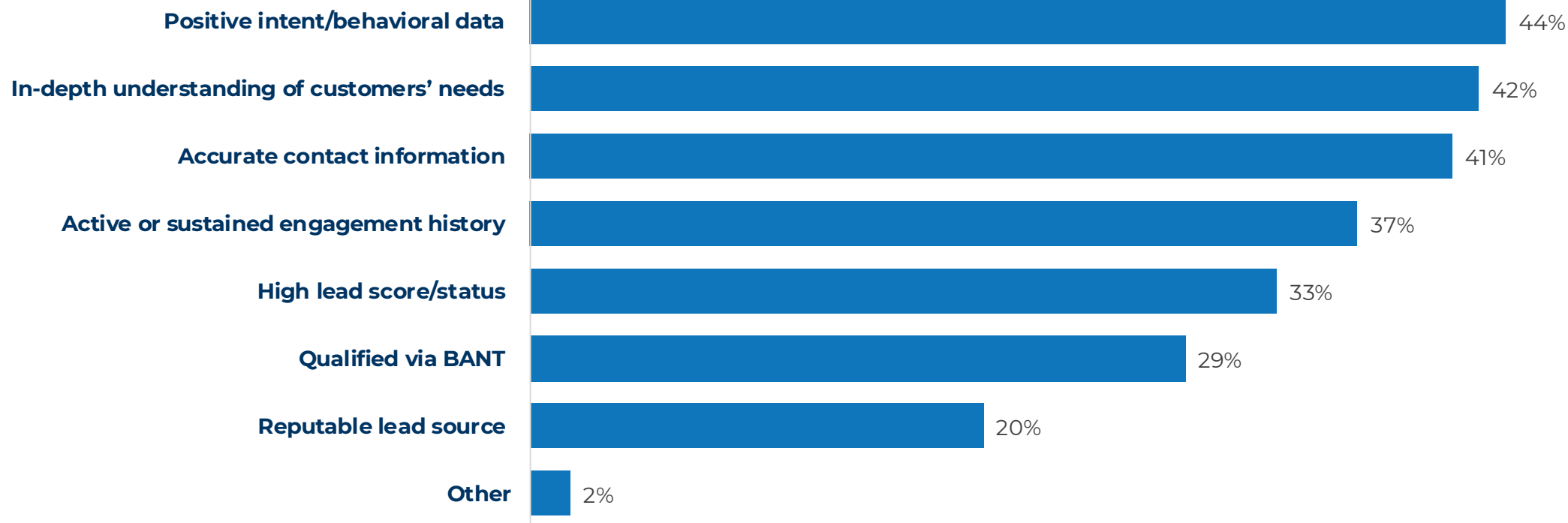
Signals and needs-based account info beat BANT

QUESTION

In the opinion of your sales team, which of the following indicators are the most important to capture prior to engaging a lead/account? (Select up to 3)

TAKEAWAY

Sales teams prioritize ABM signals, needs-based account info, and data accuracy above all else.



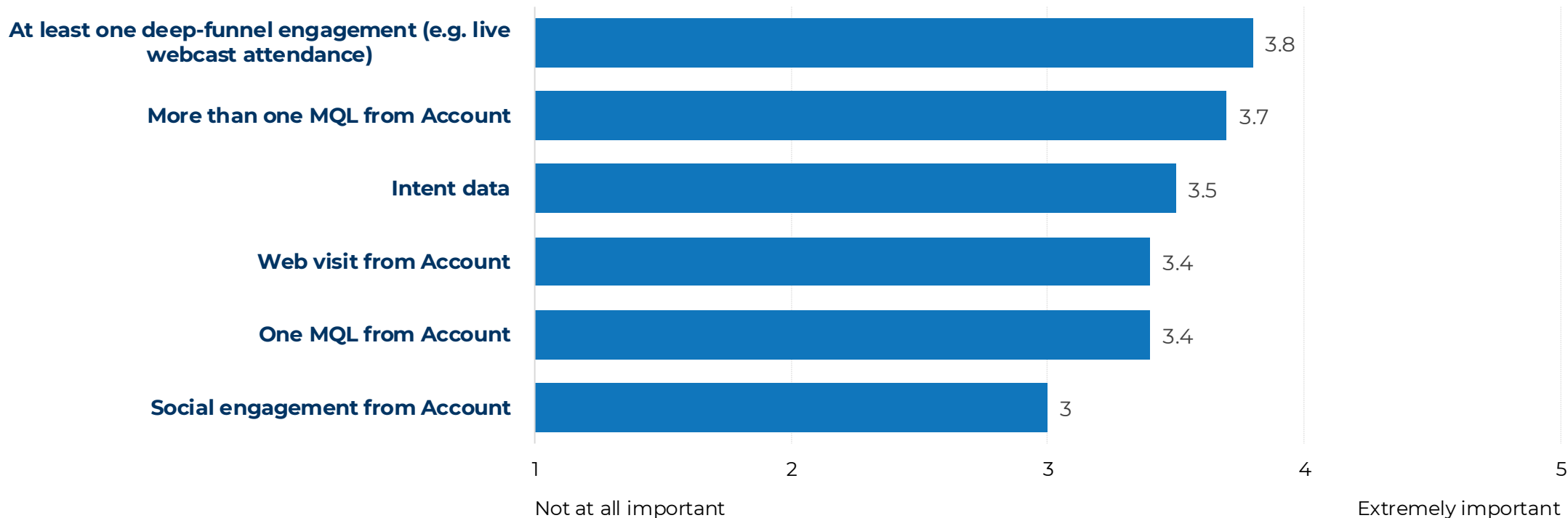
Account signal and penetration rate highest

QUESTION

Please rate the importance of each engagement signal below. (1 = Not at all important, 5 = Extremely important)

TAKEAWAY

Deep-funnel engagement signals and account penetration rank highest versus other signals.



activate

State of Demand Gen

September 2026

Actions and insights for the year ahead

Thank You

