



WYNTER RESEARCH / MAY 2026

HOW B2B MARKETING ACTUALLY USES AI

A survey of 100 Directors, VPs, and Heads of Marketing at mid-market and enterprise SaaS companies on what they actually do with AI, what's working, what isn't, and what nobody's writing about.

THE HEADLINE

THE AI SHIFT IS REAL,
BUT IT DOESN'T LOOK
LIKE THE HEADLINES.

Most reporting on AI in marketing covers two camps: the doomers ("AI will eliminate marketing roles") and the boosters ("AI will transform B2B"). The reality is messier, quieter, and more strategically interesting than either narrative.

100 B2B marketing leaders surveyed	10 Questions, six open-ended	6 Headline findings
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In May 2026, Wynter surveyed Directors, VPs, and Heads of Marketing at mid-market and enterprise SaaS companies on how their organizations are actually using AI. The findings on the next two pages.

HEADCOUNT AND WORKFORCE

THE CUTS ARE HAPPENING. MOST DON'T LOOK LIKE CUTS.

01**The AI cuts already happened. Nobody called them layoffs.**

47% of companies have eliminated, reduced, or stopped backfilling marketing roles due to AI in the last 12 months. Only 7% had visible team shrinkage. The other 40% happened through attrition and unfilled reqs.

02**Senior marketers feel safe. They're cutting the seat below them.**

94% of marketing leaders think their own role survives the next 24 months. 60% name content and copywriting as the role getting cut. 20% explicitly name junior and entry-level positions.

03**Shadow AI is the default operating model.**

41% of marketers openly admit using personal accounts to bypass corporate AI restrictions. 90% of their companies have at least partial restrictions in place. The bypass is universal.

STRATEGY, ROI, LEADERSHIP

MOST COMPANIES BOUGHT LICENSES AND CALLED IT A STRATEGY.

04 AI ROI is real for the 23% who built workflows. 53% are still buying licenses and calling it a strategy.

Among ROI-positive companies, the playbook is consistent: strategy first, tight procurement, start with the stuck backlog, build the workflows.

05 AI-washing crosses category lines.

30% of companies admit their external AI messaging is ahead of internal deployment. This includes companies that sell AI products, not just non-AI vendors trying to look modern.

06 Leadership is bimodal and disengaged.

22% of marketers say leadership thinks AI is magic. 15% say leadership is too slow. Only 14% say leadership has a realistic read. The unifying pattern: leaders aren't using AI themselves.

Beyond the headline data, three workplace shifts surfaced that go largely unreported: surveillance-based AI mandates, the erosion of job satisfaction among heavy AI users, and the normalization of a two-tier AI stack. These are documented in the final section of this report.

HOW THIS STUDY WAS CONDUCTED

100 MARKETING LEADERS. 10 QUESTIONS. MAY 2026.

The sample

100 verified B2B marketing leaders from Wynter's professional research panel. All respondents are Directors, VPs, or Heads of Marketing at mid-market (200-999 employees) or enterprise (1,000+ employees) SaaS companies.

58 mid-market. 42 enterprise. Job titles skewed toward Product Marketing (PMM Directors, Sr Directors, VPs), with a meaningful subset of Brand, Demand Gen, and CMO-track leaders.

The questions

Ten questions designed to surface what marketing leaders actually do with AI rather than what they say in conference keynotes. Four were structured multiple-choice; six were open-ended.

Mostly we asked about behavior, not opinion. "Has your company eliminated roles?" not "Do you think AI will eliminate roles?"

The analysis

Thematic coding of open-ended responses with explicit attention to disconfirming evidence. Where claims appear in the report, supporting quote counts and cohort distributions are noted.

Where the data did not support an obvious narrative, the report says so.

Limitations

The sample is B2B SaaS at mid-market and above. Findings do not generalize to SMB, agencies, or B2C marketing.

All data is self-reported. Marketers say they use personal Claude subscriptions; we cannot verify usage. ROI assessments are impressionistic, not financial.

Survey format means follow-up questions weren't possible. Themes are directional, not exhaustive.

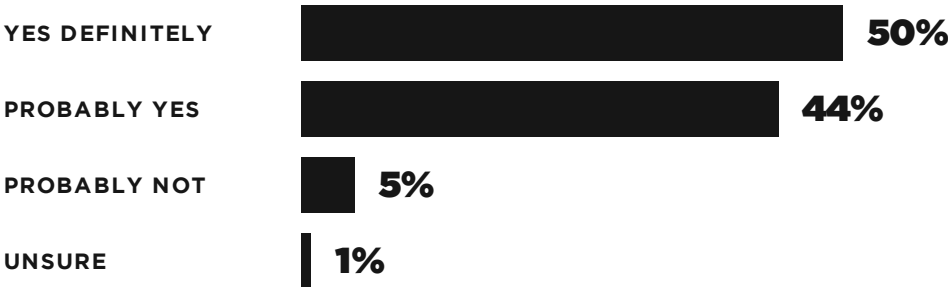
THE SAFETY PARADOX

94% OF MARKETING LEADERS THINK THEIR OWN ROLE IS SAFE.

We asked: "Do you believe your role exists in its current form in 24 months?"



Distribution



WHY THIS MATTERS

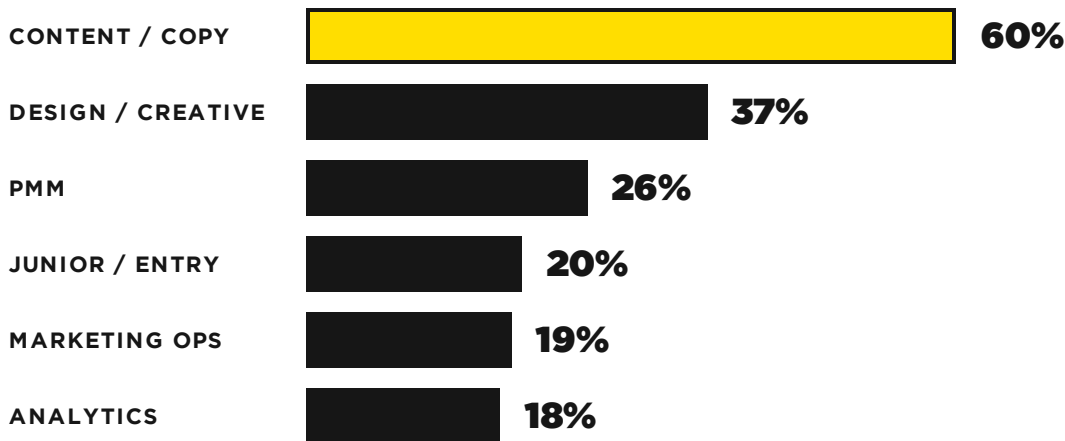
The seat I'm in is safe. The seat below me is gone. Senior marketers feel personally secure, but they're cutting the layer beneath them. The job isn't getting eliminated. The path to the job is.

COMPRESSION FROM BELOW

THE ROLES GETTING CUT. NAMED BY THE PEOPLE MAKING THE CALLS.

We asked: "Which marketing roles or functions at your company do you believe are most at risk of being eliminated or reduced in the next 24 months?"

Most-named roles at risk



"My PMM team are nearly all Directors. The execution is much easier with AI, so I just need senior folks who can build trust in the organization."

SR DIRECTOR PMM, ENTERPRISE SAAS

WHY THIS MATTERS

Senior PMMs are running Claude to do the work three junior writers used to do. Directors aren't backfilling content roles when people leave. The ladder is being pulled up behind the people already on it.

IN THEIR OWN WORDS

THREE PATTERNS FROM THE DATA.

The math is brutally specific

"Instead of having 3 contract writers, my team now has 1, and they only review and update AI generated content."

SR DIRECTOR PMM, ENTERPRISE SAAS

Seniors absorb the junior workload

"Seniors can achieve the same work as a junior in just a few hours with Claude. We'll always need humans in the loop, but vastly compressed teams."

SR PMM, ENTERPRISE SAAS

The ladder is being pulled up

"Junior designer - we had plans to add more junior design talent. I believe we will actually add senior, AI-forward talent who will empower existing teams to do more vs adding more juniors."

VP BRAND MARKETING, MID-MARKET SAAS

SELF-INCRIMINATION IS IN THE DATA

20% of PMMs named PMM as a role at risk. Senior marketers explicitly admitting their own function is structurally exposed - while still believing their personal seat is safe.

THE QUIET CUTS

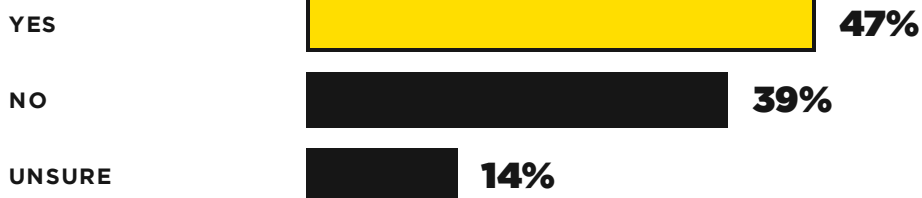
47% HAVE ALREADY CUT MARKETING ROLES TO AI. MOST DIDN'T CALL THEM LAYOFFS.

47%

THE HEADLINE STAT

Of B2B companies have eliminated, reduced, or stopped backfilling marketing roles due to AI in the last 12 months.

Distribution



Mid-market is cutting harder than enterprise

52%

MID-MARKET

200-999 employees, cut roles to AI

40%

ENTERPRISE

1,000+ employees, cut roles to AI

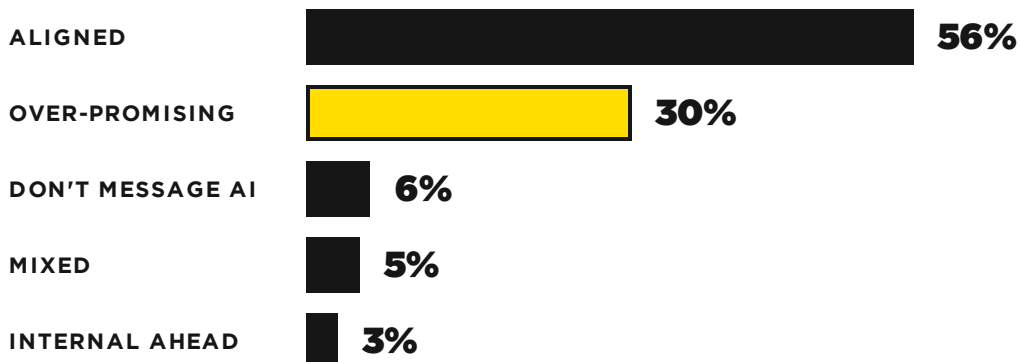
WHY THIS MATTERS

Not a layoff announcement. Not a press release. Just a hiring req that quietly disappears. Most leaders don't even call this an AI decision -- they call it "we got more efficient." Same outcome. Fewer headlines.

AI-WASHING CROSSES CATEGORY LINES

30% ADMIT THEIR AI MARKETING IS AHEAD OF THEIR AI REALITY.

We asked: "How does your company's external messaging about AI compare to what's actually deployed internally?"



"It's a keep up with the joneses positioning, inflating the capabilities of what's deployed and exaggerating the vision of what's actually coming."

SR PMM, MID-MARKET SAAS

WHY THIS MATTERS

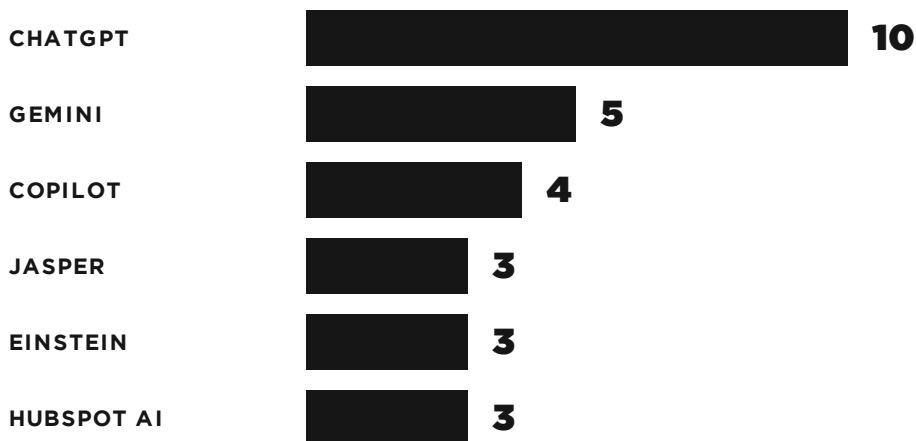
The pattern is universal. AI sellers, non-AI sellers, enterprise, mid-market -- everyone's marketing is a step ahead of what they've built. Every B2B category buzzword runs 12-18 months ahead of reality. "AI-forward" was a 2024 narrative. The 2026 narrative is AI-honest.

WHAT'S ACTUALLY DISAPPOINTING MARKETERS

THE HALL OF DISAPPOINTMENT. AND THE ONE TOOL THAT'S WINNING.

We asked: "Which AI marketing tool has most disappointed you or your team in the last 18 months, and why?"

Most-named disappointing tools



Counts based on direct mentions in open-ended responses. Number = respondents who named this tool as disappointing.

"The native AI tools in some vendor applications feel light years behind what Claude or ChatGPT can output."

SR DIRECTOR PMM, ENTERPRISE SAAS

WHY THIS MATTERS

Marketing teams are running a two-tier AI stack. The corporate one IT signed off on -- nobody uses it. And the personal Claude subscription -- that's where the real work happens. Procurement buys the tool. Operators ignore it. The chosen tool wins.

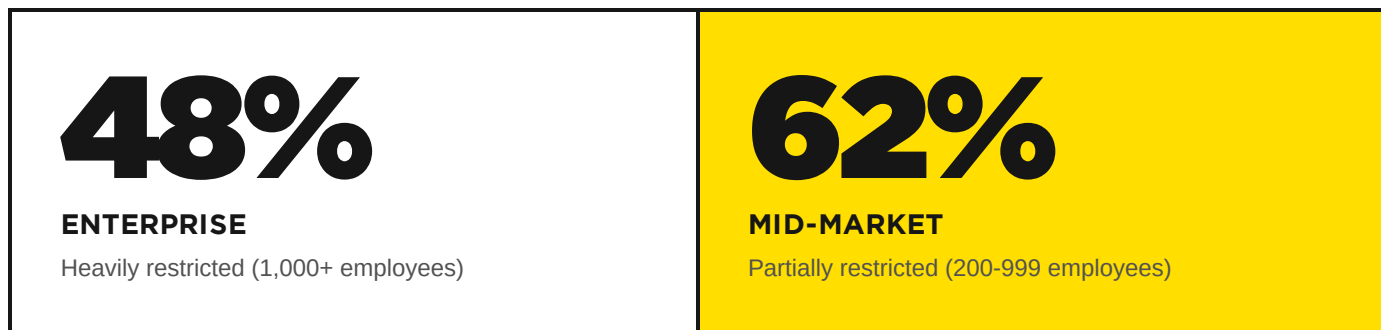
THE RESTRICTION LANDSCAPE

90% OF B2B COMPANIES RESTRICT AI TOOLS. THE BYPASS IS UNIVERSAL

We asked: "Has IT or security restricted which AI tools your marketing team can use?"



Restriction level by company size



WHY THIS MATTERS

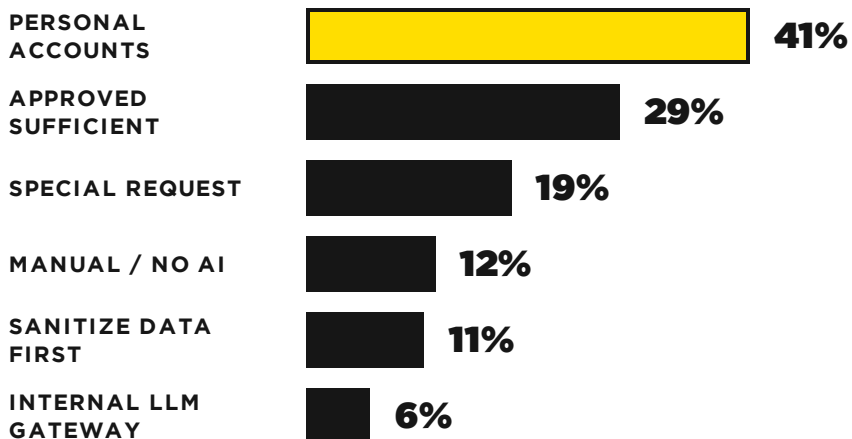
Companies with heavy, partial, and no restrictions report negative ROI at similar rates (49-60%). Tightening AI policy doesn't solve the ROI problem. It just pushes work into shadow AI, documented on the next page.

SHADOW AI IS THE DEFAULT

41% OPENLY ADMIT RUNNING AI WORK ON PERSONAL ACCOUNTS.

We asked: "Describe how you or your peers actually get AI work done when official tools are restricted or unavailable."

Workaround patterns



"We are imposed to use Copilot, and because it's crap we pretty much all use the paid version of Claude. We get what we need from it and export our work."

DIRECTOR PRODUCT MARKETING, MID-MARKET SAAS

WHY THIS MATTERS

You can't police this. Marketers will pay for Claude with their own money before they wait six months for IT to evaluate it. The real choice is between sanctioned AI you can put guardrails on, or unsanctioned AI happening in browser tabs IT can't see.

IN THEIR OWN WORDS

HOW MARKETERS DESCRIBE THE BYPASS.

"I've been using my own Claude account for the last year"

"I've been using my own Claude account for the last year. The company literally just rolled out Claude. I've been using my personal email and loading company documents into it. The benefits outweigh the risks."

SR DIRECTOR MARKETING, MID-MARKET SAAS

"Sign up for things on our own and beg forgiveness later"

"Sometimes we just sign up for things on our own and beg forgiveness later. However to connect to any customer data or internal company information, it has to go through IT, so we only go rogue when it is not connecting to sensitive data."

DIRECTOR PMM, MID-MARKET SAAS

"Sensitive data is definitely going rogue"

"Official tools are available but I know people using their personal laptops for working with unapproved tools. Sensitive data is definitely going rogue but nobody is thinking about it."

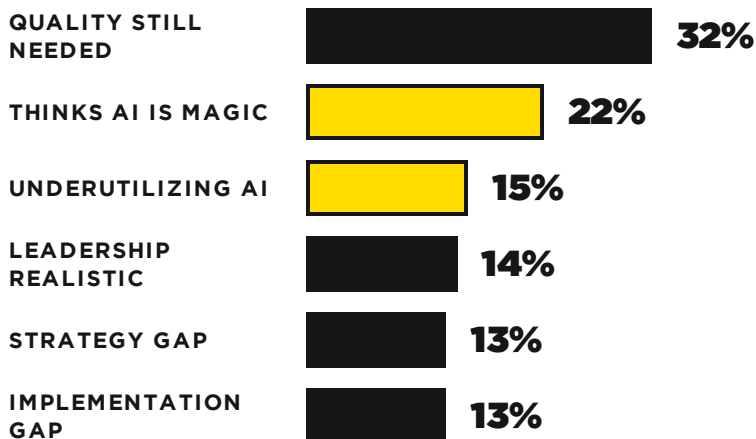
SR PMM, ENTERPRISE SAAS

LEADERSHIP IS BIMODAL

MARKETING LEADERSHIP IS EITHER PUSHING TOO HARD OR MOVING TOO SLOW.

We asked: "What does your marketing leadership most misunderstand about AI today?"

Top complaints about leadership



22%

"AI IS MAGIC"

Leadership overestimates AI capability

15%

"TOO SLOW"

Leadership underutilizes AI

WHY THIS MATTERS

Both camps share one trait: leaders aren't using AI themselves. If you lead marketing and you're not personally building with AI -- not demoing, building -- you're guessing. Four hours shipping something real beats any vendor pitch.

OPPOSITE COMPLAINTS, SAME ROOT

THE TWO CAMPS IN THEIR OWN WORDS.

Camp 1: "Leadership thinks AI is magic"

"They believe AI is easy to implement. They believe we can create entire automations by just prompting Claude. It takes much more effort to create a system that actually works."

DIRECTOR PMM, MID-MARKET SAAS

"They get excited about every new shiny object and misunderstand how much time, energy, and skill is needed to train these tools to work for you effectively."

HEAD OF MARKETING, MID-MARKET SAAS

Camp 2: "Leadership is too slow"

"Everyone is using AI and we need to move way faster. Our competitive moats will wither away. We're moving way too slow."

HEAD OF PMM, ENTERPRISE SAAS

"1 or 2 AI-native marketers can now do the work of a 30-40 person team. Leadership doesn't see this."

SR PMM, ENTERPRISE SAAS

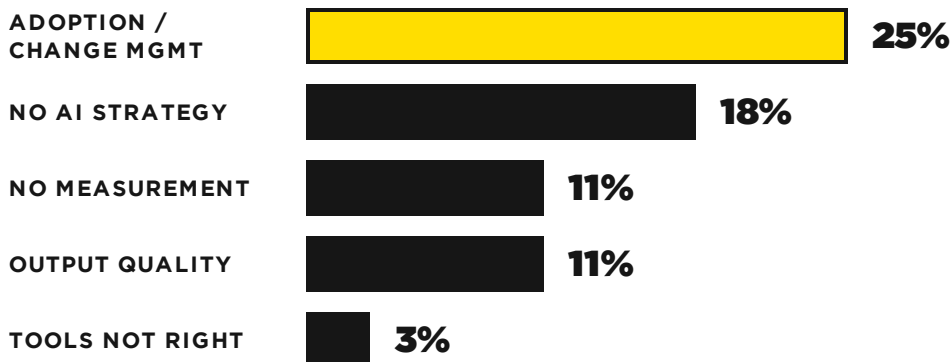
THE ROI GAP

53% SAY AI HASN'T DELIVERED ROI. THE DATA SHOWS WHY.

We asked: "What's the single biggest reason your company's AI marketing investments have or haven't delivered ROI?"



Top blockers cited by the no-ROI cohort



WHY THIS MATTERS

Claude at \$25 per seat is essentially free for any B2B company. The tool isn't the bottleneck. The bottleneck is the implementation work -- identifying workflows, automating them, training the team, measuring impact. Most companies bought licenses and called it a strategy. The 53% didn't fail at AI. They failed at workflow design.

WHAT THE 23% WHO GOT ROI ARE DOING

THE PLAYBOOK FROM COMPANIES ACTUALLY SEEING AI ROI.

Four patterns came up repeatedly among ROI-positive respondents. None are about which AI tool. All are about how the team operates around it.

- 1 Strategy first, AI second.** The ROI cohort kept saying AI is an accelerant of strategy, not a substitute for it. "Garbage in, garbage out. We found success by cleaning up the garbage."
- 2 Tight procurement discipline.** Counterintuitively, companies with the most onerous procurement process for AI report better ROI. They only buy tools they're confident in. Short contracts. Aggressive value tests.
- 3 Start with the stuck backlog.** The best first AI use case isn't replacing existing work. It's unblocking work that was never going to happen - internal dashboards, training materials, research projects.
- 4 Actually automate the workflows.** The companies seeing ROI consolidated tools and built specific repeatable workflows. Not "the team uses Claude sometimes" - tool consolidation, multi-channel triggers, measurable pipeline outcomes.

"It goes back to strong PMM fundamentals. Clear understanding of our ICP. Clear understanding of the problems we solve. AI is just an accelerant of your strategy. Garbage in, garbage out."

DIRECTOR PMM, MID-MARKET SAAS

THE 18-MONTH TEAM TRAJECTORY

TEAMS ARE FLATTER THAN THEY WERE 18 MONTHS AGO.

We asked: "How has your marketing team's size and structure changed over the last 18 months?"

**WHY THIS MATTERS**

Of the 47% who reported AI-driven role cuts, only 16% saw their team visibly shrink for AI reasons. The other 31% are reducing through attrition -- not backfilling, not posting, quietly reorganizing. Teams aren't shrinking dramatically. They're hollowing out the bottom rung.

WHAT THIS MEANS

MARKETING TEAMS AREN'T SHRINKING DRAMATICALLY. THEY'RE GETTING OLDER.

Headcount is roughly flat. Composition is shifting toward senior, AI-equipped operators. The bottom rung is disappearing in places where it wasn't formally announced.

PART TWO / UNEXPECTED INSIGHTS

WHAT THE DATA SAYS ABOUT WORK.

Beyond the headline numbers, the survey surfaced patterns about how AI is changing the texture of B2B marketing work. Three of them are documented in the pages that follow. None are getting written about elsewhere.

A NEW KIND OF TOXIC WORKPLACE

AI ADOPTION IS BEING ENFORCED THROUGH SURVEILLANCE.

The "embrace AI" message has hardened into a measurable mandate at a portion of mid-market and enterprise SaaS companies. Token usage is now a tracked KPI. Multiple respondents reported colleagues being let go for non-adoption.

“Our leadership tracks tokens and usage across the company which feels terrible. They have openly let people go who are not willing to adopt. It’s a fear tactic.

SR PMM, ENTERPRISE SAAS

What this looks like in practice

Respondents described several enforcement patterns: monthly AI usage dashboards reviewed by managers, token consumption flagged as a performance signal, "AI proficiency" added as a formal KPI in performance reviews, and team members exited for "not adapting to AI workflows" without formal documentation of underperformance.

The respondents who described these patterns were not anti-AI. Most use AI heavily themselves. Their objection was the surveillance posture, not the technology.

THE EMOTIONAL COST NOBODY IS MEASURING

HEAVY AI USERS ARE LOSING SATISFACTION IN THEIR WORK.

One respondent put the cost in language that surfaced in subtler form across the dataset. The companies tracking AI productivity are not tracking what AI is doing to the people producing.

“I am not sure if leadership understands how much AI has eroded the satisfaction of doing our jobs. It’s hollowed out a lot of what made me attracted to work.

HEAD OF BRAND MARKETING, ENTERPRISE SAAS

The pattern beneath the quote

This was an outlier in volume but variations of it appeared throughout the dataset. Respondents described feeling like reviewers rather than creators, losing the “thinking” portion of their work to AI prompting, and watching the parts of marketing they found meaningful get automated away.

The complaint was loudest from senior marketers whose roles have shifted toward editing AI output rather than building from scratch. AI is keeping them productive. It is also gradually disconnecting them from the work that made them want to be marketers.

THE TWO-TIER AI STACK IS NOW STANDARD

EVERY MARKETING TEAM IS RUNNING SHADOW INFRASTRUCTURE.

At most mid-market and enterprise SaaS companies, marketing now operates on two parallel AI stacks: the IT-approved corporate tools and the personal subscriptions employees pay for themselves. The work that ships is increasingly happening on the personal stack.

“We are imposed to use Copilot, and because it's crap we pretty much all use the paid version of Claude. We get what we need from it and export our work.

DIRECTOR PMM, MID-MARKET SAAS

The governance gap

Few CISOs are tracking what's happening on the personal stack. Marketers are using personal Gmail logins, personal laptops, and personal credit cards to access AI tools their company hasn't approved. Company documents move through these tools and back into the corporate environment with no audit trail.

The risk isn't a hypothetical. Multiple respondents explicitly described uploading sensitive customer data, product roadmaps, and unreleased messaging to personal AI accounts. None reported being told to stop.

SIX TAKEAWAYS FOR B2B MARKETING LEADERS

WHAT TO ACTUALLY DO WITH THIS DATA.

TAKEAWAY 01

AUDIT YOUR REAL AI STACK, NOT YOUR APPROVED ONE.

The tools your team has on their personal browser at 3pm are your real AI stack. Buy them the tools they're already using. Stop paying for the shelfware that nobody opens.

TAKEAWAY 02

STOP SAYING "AI STRATEGY" IF WHAT YOU HAVE IS LICENSES.

The 53% with no ROI didn't fail at AI. They failed at workflow design. Pick one outcome. One owner. One metric. Build the workflow. Then do it again.

TAKEAWAY 03

THE JUNIOR LAYER IS DISAPPEARING. PLAN ACCORDINGLY.

If you're a hiring manager, you're hiring fewer juniors. If you're a senior leader, your team's seniority is increasing without anyone calling it out. The pipeline of future senior marketers is shrinking. That's a 3-5 year problem.

CONTINUED

THE NEXT THREE TAKEAWAYS.

TAKEAWAY 04

LEADERS WHO DON'T USE AI ARE MAKING BAD DECISIONS ABOUT AI.

Both camps - the magic-wand believers and the too-cautious skeptics - share one trait: they aren't building anything themselves. Spend 4 hours this week shipping something real with AI. The strategic clarity is worth more than any vendor pitch.

TAKEAWAY 05

STOP TRYING TO POLICE SHADOW AI. EMBRACE IT.

You can't police it. Your marketers will pay for Claude personally before they wait six months for IT to evaluate it. The real choice is between sanctioned AI you can put guardrails on, or unsanctioned AI happening in browser tabs IT can't see.

TAKEAWAY 06

IF YOU'RE AI-WASHING EXTERNALLY, STOP.

30% of B2B companies admit their AI marketing is ahead of their AI reality. Sophisticated buyers can tell. The companies still winning in 12 months will be the ones who told the truth about what they actually built.

ABOUT WYNTER

THIS REPORT WAS BUILT ON WYNTER.

Wynter is a B2B market research platform with an 80,000+ verified panel of marketing, sales, and ops professionals. Run a message test, ICP survey, brand tracking study, or preference test in under 48 hours.

The data in this report was collected May 18-22, 2026 from 100 Directors, VPs, and Heads of Marketing at mid-market and enterprise SaaS companies, all members of the Wynter panel.

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