SAN FRANCISCO

Beyond the Framework.

Key learnings and takeaways from the 2026 ANA Brand-to-Demand Conference

PRODUCED BY STEIN IN PARTNERSHIP WITH ANA

ANA BUSINESS MARKETING | Stein.

“Our brand-to-demand journey began as a conversation among members about integration. It has evolved into a broader discussion about how organizations create growth.”

Dagmara Szulce, Group EVP, ANA

Introduction.

B2B marketers have long understood that sustainable growth requires strong alignment across how organizations build brand and drive demand. Yet in many companies, these disciplines still operate in silos: owned by different teams, measured by different metrics and funded through competing priorities. The result is not just inefficiency but missed growth opportunities.

This work began in 2024 through ANA's collaboration with Stein, following a challenge raised repeatedly by ANA members. While the value of integrating brand and demand was widely recognized, making it operational inside complex organizations proved far more difficult. Closing that gap has since become one of the ANA's most important areas of focus and thought leadership.

The urgency has only increased. Buying groups are larger and less linear, financial scrutiny is intensifying, and AI is reshaping how buyers discover and evaluate potential partners. In this environment, fragmented approaches to growth are no longer viable. The organizations outperforming their peers are those that align brand and demand, linking reputation to pipeline, investment to impact and creativity to measurable business outcomes.

At the ANA, our mission is to advance marketing excellence and drive growth. Our work reflects a broader focus on how organizations build confidence across the entire buying ecosystem. Through initiatives such as the B2B Brand-to-Demand Maturity Study, The Confident B2B Marketer, the Decision Committee model and The Marketing Impact Measurement Study, we help members create confidence among buyers making complex decisions, the AI systems influencing discovery, the finance leaders evaluating business impact and executive teams making investment decisions.

These efforts are grounded in a clear insight reinforced at the 2026 ANA Brand-to-Demand Conference: growth is no longer the result of choosing between brand and demand. It comes from integrating them in ways that build trust, credibility and decision confidence across every stakeholder that influences business outcomes.

We hope the insights in this report help advance that conversation within your organization and accelerate your journey toward more connected, accountable and effective growth.

Sonia David
VP, B2B Practice
Association of National Advertisers

There's a moment at every great conference when the room stops taking notes and starts nodding in agreement. At the 2026 ANA Brand-to-Demand Conference in San Francisco, that moment happened repeatedly.

The third annual Brand-to-Demand Conference, co-created by Stein and ANA. The theme, "Beyond the Framework," reflected exactly where the industry stands: the case for integrating brand and demand has been made. The research is clear. The market evidence is decisive. What the room gathered to address was the question at hand: what does it take to close the execution gap?

The data we shared from the first Brand-to-Demand Maturity Study was clarifying. Eighty percent of organizations are still in the early stages of brand-to-demand integration. When I asked the room to raise their hands if they considered themselves fully unified, only a hand or two hesitantly was raised.

That being said, what followed was extraordinary. ServiceNow's Jim Lesser gave an instructive account of genuine brand-building and what brand-to-demand integration inside a major enterprise actually looks like. Brand Finance's Alfred DuPuy gave a financial case for brand-led marketing. LinkedIn's Jann Schwarz shared an update on Buyability. And we saw proof from Workday, SAP, HPE, Palo Alto Networks and Univar Solutions that when you back the brand, demand delivers.

What stays with me is that brand-to-demand conviction is no longer decision. It's a model and discipline that requires defending, investing in and building culture around. Because that's what The B2B Decade demands. And that's what B2B marketers are rising to achieve.

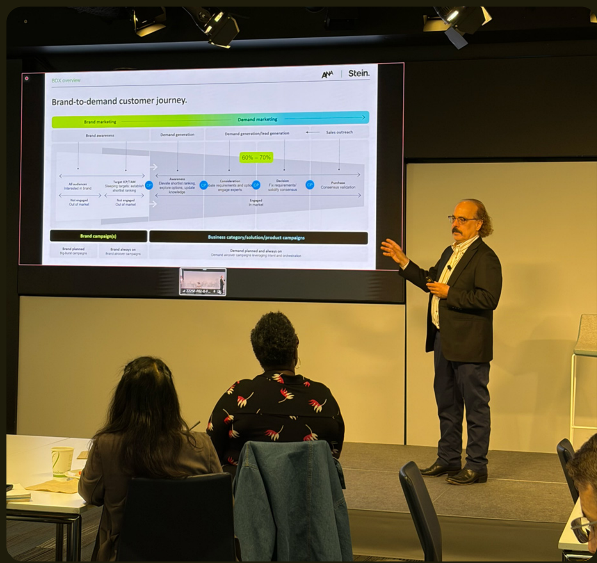
Tom Stein
Chairman and Chief Brand Officer
Stein

THE SIGNAL IS CLEAR

Brand and demand must stop acting like strangers.

At the third annual Brand-to-Demand Conference, hosted at LinkedIn's San Francisco office, Stein and ANA brought together marketing leaders from B2B's most consequential brands to assess their brand-to-demand integration progress. The theme, "Beyond the Framework," reflected the advances many marketers have made since the BDX framework first debuted.

What was clear: brand to demand is no longer under construction. The framework exists. The research is in. The case is accumulating. The priority now is execution: what does it actually take to unify brand and demand at scale, within complex organizations, under real commercial pressure? The gap between aspiration and reality remains industry wide, but the path to closing it is in sharper focus than ever.



Key conference takeaways

- **100% of B2B marketers** consider brand-to-demand integration a priority – yet, 80% are still in the early stages of maturity. The 20% of enterprises further along benefit from up to 208% more marketing-generated revenue.
- C-suite conviction is the most powerful unlock. However, **only 13%** of marketers say their C-suites consider brand to demand extremely important.
- Brand value is a balance sheet metric. The gap between leading B2B and B2C brands stands at **$4 trillion.**
- **95% of companies** buy from their day-one shortlist. If you're not already known when a buying journey begins, you're left behind.
- **AI has disrupted the traditional demand engine.** Brand equity and AI discoverability are now the same investment.
- Emotional, human-centered creativity continues to drive commercial results.

The maturity gap is real. Closing it starts with candid assessment.

The day opened with findings from the 2025 Brand-to-Demand Maturity Study, presented by ANA's Sonia David and Stein's chairman Tom Stein. Drawing on insights from over 200 senior enterprise marketers, the Study measured where B2B organizations stand on their brand-to-demand journey — and revealed a long journey ahead.

Tom walked the room through four maturity stages, from "under-invested" through "balanced but siloed" to "connected," to the coveted and rare "fully unified" state. The data: 80% of respondents are still in the early stages. Unicorns — the 3% that have achieved full unification — are as elusive as in mythology. When Tom asked the room to self-identify if fully unified, no hands went up.

Most are at the beginning stages of brand-to-demand unification maturity

Under-invested in brand

43%

Immature: Less than 25% of budget allocated to brand. Brand and demand activities siloed and disconnected.

Balanced but siloed

37%

Developing maturity: More balanced brand-to-demand investments, but campaigns/programs are disconnected.

Connected

17%

Mature: Balanced brand and demand investment, connected campaign approaches and customer experiences, with data-driven funnel automation.

Fully unified (unicorns)

3%

Very mature: Fully connected brand-to-demand experiences, full-funnel orchestration, integrated audience data strategy, and a team dynamic and culture that sees brand and demand as one integrated strategy.

Of six barriers identified, C-suite conviction stood out as both the most powerful unlock and the most commonly missing ingredient: only 13% of respondents said their C-suite views integration as a high strategic priority. Yet fully unified organizations reported that 7 in 10 C-suite leaders are strongly aligned on brand-to-demand demand as a growth lever.

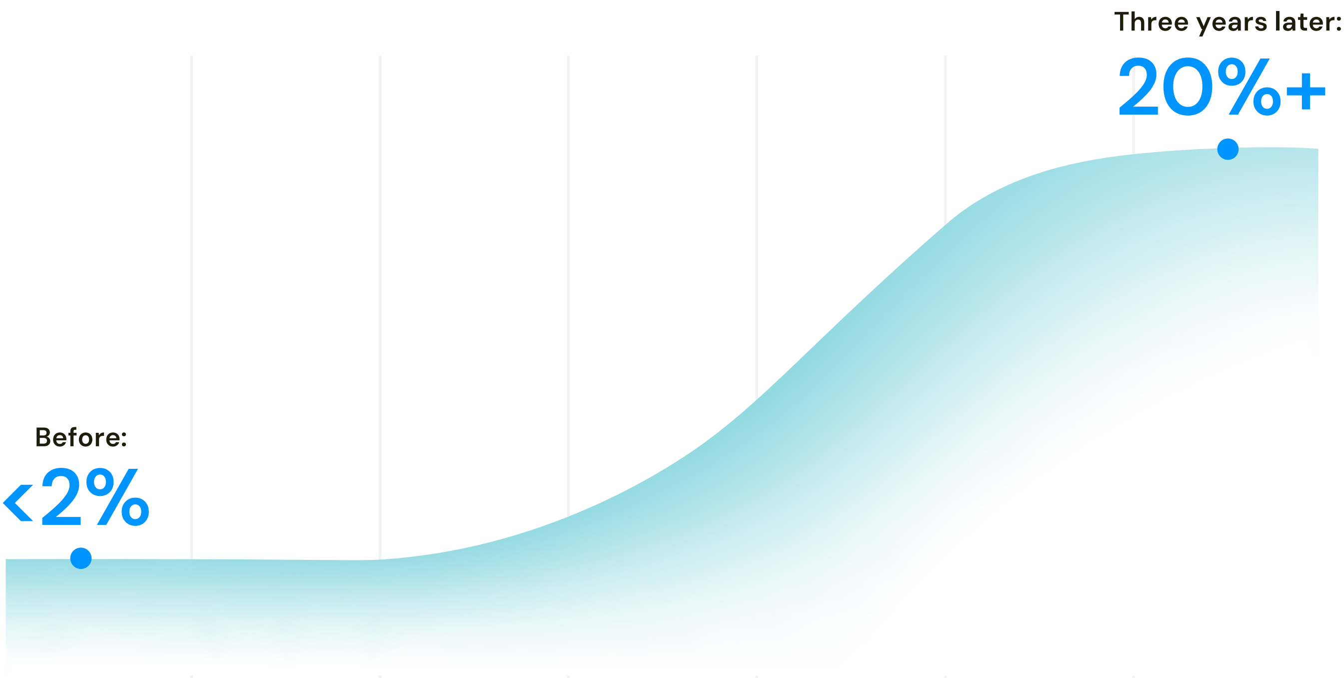
> **"24% of marketers are delivering an equal brand-to-demand mix. 72% want to. The internal forces inside businesses are powerful."**
>
> Tom Stein, Chairman + Chief Brand Officer, Stein

Why is it so f*ing hard to build a brand in B2B? The ServiceNow answer.

Jim Lesser, SVP and Chief Brand Officer at ServiceNow, delivered the day's most quotable session — a frank, funny account of what genuine brand-building looks like inside a major enterprise software company.

With unaided awareness below 2% and brand perceptions trapped in IT ticketing, ServiceNow needed to reach C-suite buyers across HR, finance and customer service — while simultaneously landing its AI positioning.

The solution: a brand-to-demand platform anchored by Idris Elba as the archetypal bold CEO, surrounded by a cast of characters mapped to a specific buying group persona. It became a modular brand engine, not just a campaign. The platform extended from a 30-second brand spot to deep-funnel content, social series and event activations — grounded in the insight that brands known to buying groups get on that day one shortlist and win more deals, more quickly.



Lesser's practical advice to marketers struggling to secure support for bigger brand bets: build systematic evidence — brand health tracking tied to revenue outcomes, framed in language the CFO and board recognize. That's how brand investment gets protected, not cut.

$12.9 billion

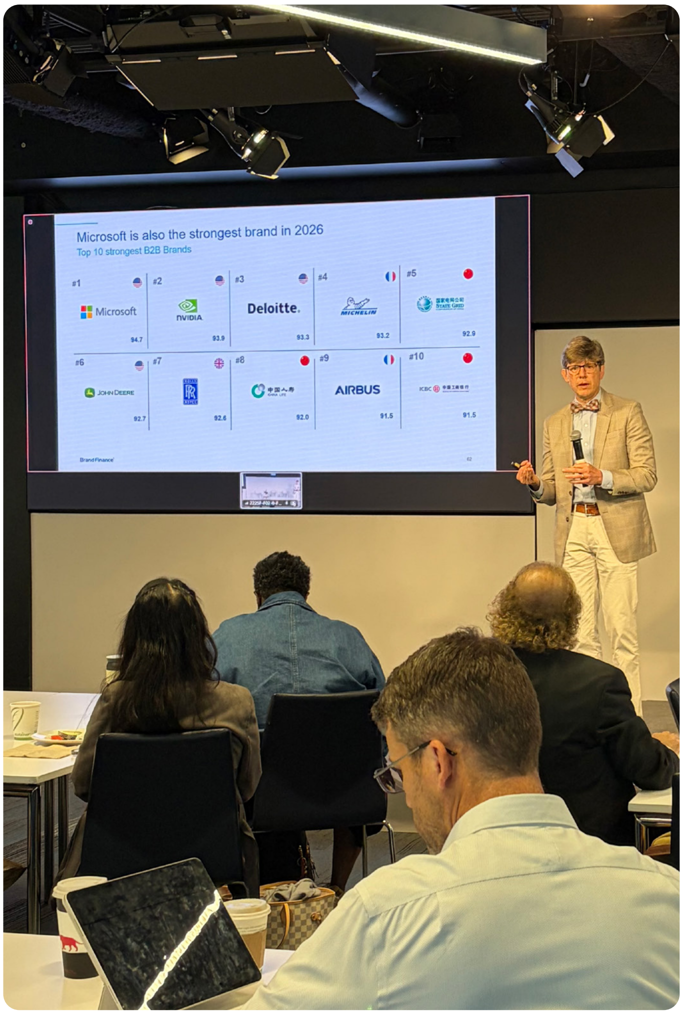
ServiceNow subscription revenue, growing 20%+ year on year

Brand strength drives enterprise value. The numbers are decisive.

Alfred DuPuy, Managing Director for North America at Brand Finance, presented the fourth annual Brand Finance World's Most Valuable B2B Brands Report — developed in partnership with ANA and the IAA, covering 300 brands globally with a combined brand value of $4 trillion. The data makes a direct case that brand investment drives enterprise value in profound and powerful ways.

Microsoft leads the index for the fourth consecutive year; NVIDIA now ranks second after close to 100% year on year. Across 600+ brands, the strongest command higher EBIT multiples, higher pricing-to-earnings (P/E) ratios, lower borrowing costs and significantly greater resilience.

DuPuy also identified five traits shared by the world's strongest B2B brands: **exceptional leadership** (Jensen Huang of NVIDIA); **continuous innovation** (Accenture); **a trust architecture built on functional, relational and principled trust** (Microsoft's AI governance approach); **the ability to operate on both rational and emotional registers simultaneously** (IBM's durability); and **sustained, confident investment in brand as |a percentage of revenue** (MasterCard).



> "Brand value is a snapshot in time. Brand strength is where you are going. That is the trajectory we need to be tracking."
>
> Alfred DuPuy, Managing Director NA, Brand Finance

Bold moves: What happens when you back the brand.

Rob Whitney of Univar Solutions and Erik Petersen of Workday joined LinkedIn's Mike Dudgeon to discuss what genuine brand bets look like inside real organizations — and what it takes to live with the outcomes.

Univar Solutions, a global chemical distributor, had long operated as a brand extension of its supplier partners. Whitney led a pivot from selling commodities to marketing solutions, launching a "Technical Superheroes" campaign that turned lab chemists into comic book characters. The result: Univar beat all four public-market peers on revenue growth for five consecutive quarters.

Workday's bet started with a CEO challenge: produce a Super Bowl ad worthy of the brand's ambition. "The Rock Star" platform — the idea that using Workday makes you a rock star — three campaign generations later has won Cannes Lions, Clios and Effies, achieved all-time awareness highs and built a global army of advocates within its own sales force.

Five consecutive quarters

Univar beat all four public-market peers on revenue growth

Both leaders were candid about the relentless internal pressure to revert to demand at the first sign of turbulence. Their message: brand conviction is not a one-time decision — it is a discipline that must be defended every budget cycle.

Buyability: The navigation system for the age of AI.

LinkedIn's Jann Schwarz and Mimi Turner presented the Buyability framework — a model developed over three years in partnership with Bain, the IAA, the ANA, Stein and multiple other industry bodies — offering the audience a buyer-centric mental model for what really drives purchase decisions in B2B.

Schwarz and Turner dismantled the "gumball machine" model of demand generation, arguing that the MQL signal layer B2B has long relied on is being disrupted at its foundations. The evidence: 94% of buying groups now use AI to define their shortlist before ever engaging sales.

The Buyabilty model centers on a simple insight: B2B buyers are not looking to purchase a product — they are looking to make a decision they can defend if it goes wrong. The real job of marketing is to sell decision defensibility.

Turner's analysis of LLM behavior was one of the session's most striking contribution.
AI discovery tools prioritize the same signals human buyers do: peer recommendations, third-party citations, contextual relevance and educational value. Brands built on community, emotional connection and genuine expertise are protected. The Buyability flywheel is not just a human purchase model — it's the model by which LLMs determine who gets recommended.

Winning in the Brand-to-Demand Zone: The data behind the decision.

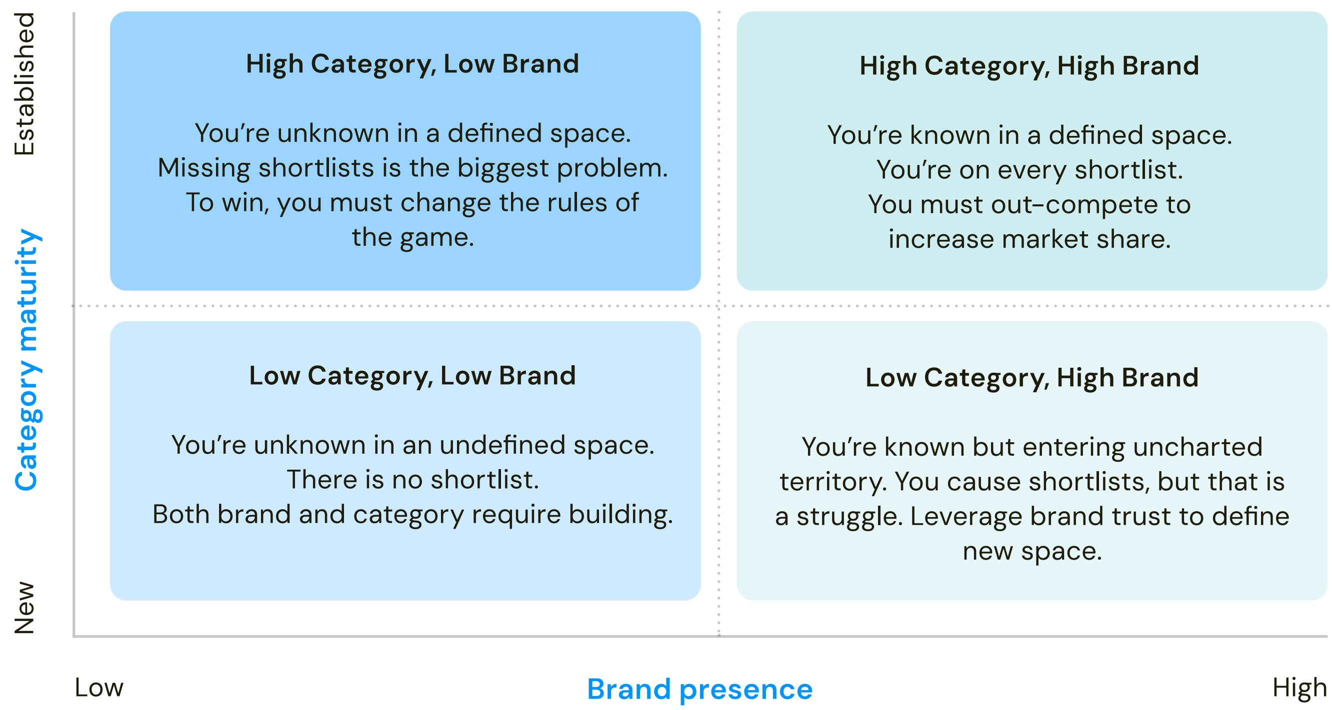
Kerry Cunningham, Head of Research and Thought Leadership at 6sense, challenged B2B marketing's most comfortable assumptions with sharp data. The 95/5 rule is closer to 95/2: only 2% of accounts are at purchase stage at any given moment, another 4% at decision stage. The remaining 94% are either not in market (60%) or in the earliest stages of a buying journey (34%).

Buying journeys run around 10 months — and 40% of those that start but never close fail not because of product fit or price, but because the buying group couldn't reach internal consensus. That, Cunningham noted, is a marketing failure.

The most significant finding: buying groups put four of five vendors on their shortlist on day one. And 95% of the time — up from 85% just a few years ago — they buy from that list. The practical conclusion: investing in early-stage brand building and staying present during the long out-of-market period is not a philosophical preference. It is a mathematical imperative.

Cunningham's category/brand maturity matrix also gave marketers a practical diagnostic — four quadrants defined by category familiarity and brand presence, with clear strategic implications for brands at each competitive stage.

Category-brand matrix



From creativity to Buyability: The full-funnel case.

SAP's Juliet Randall and HPE's Chad Mulder explored how creative effectiveness operates across the full buying journey — and the day's recurring theme held: brand creativity is not decoration, it is the infrastructure for demand.

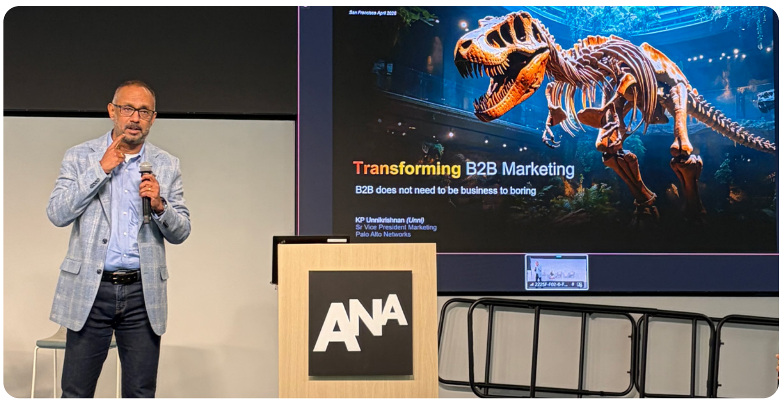
Mulder described a model in which a single creative platform stretches from broad brand storytelling to product-level demand activation. The platform must be both a "big idea" and a "long idea" — one that sustains commercial relevance at every stage of the buyer journey.

Randall framed creativity as a way to "shape the end-to-end customer experience," stressing persona-specific narratives and tailored moments (such as events and account programs) so every member of the buying committee encounters the same idea in a form that matches their role and stage.

Palo Alto Networks' Unni Kp closed the Conference with a direct challenge to incrementalism. Three shifts, he argued, are now non-negotiable for B2B brands seeking transformative growth:

- From awareness to measurable revenue contribution
- From activity metrics to genuine business impact
- From industry convention to bolder, more innovative creative expression

In a category where most brands look, sound and feel interchangeable, distinctiveness is not a creative luxury — it is a commercial necessity. The brands winning in B2B have stopped asking permission for their ideas.



YOUR MOVE

The path forward.

The ANA Brand-to-Demand Conference 2026 didn't leave its audience with a checklist. It left them with something more useful: a shared picture of the stakes. The research is clear. The financial evidence is decisive. The creative proof is real. And the AI disruption is accelerating.

The marketers that own greater growth will unify brand and demand, secure C-suite conviction, build creative platforms that work across the full funnel, measure brand health in tandem with pipeline and invest in the reputational surface area — third-party validation, peer recommendation, authentic thought leadership — that drives both human shortlisting and AI discoverability. And they will live the truth that brand strength and commercial value are synonymous. The B2B brands in the room are proving exactly that.

These insights represent Stein's synthesis and perspective. For deeper exploration of these themes and their application to your specific context, please connect with us:

Tom Stein
Chairman

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Explore industry-leading brand-to-demand insights and models

Brand-to-Demand Maturity Study developed in partnership with ANA

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Access the ***BDX Playbook*** developed with LinkedIn and WARC

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Brand-to-demand conference co-creators.

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