Measurement's Tipping Point

The Optimization Blueprint for Brand Growth

affinitysolutions

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Contents

Executive Summary

Marketing has a measurement problem, and most marketers already know it.

Despite significant investment in tools, technology, and AI, the majority of senior marketing leaders still cannot connect media exposure to an actual purchase in real time. The data that's available in real time is fast but unreliable. The data that's reliable arrives too late to act on. Most marketers are stuck choosing between the two. Meanwhile, they are measuring success against platform results that 91% of them believe are overstated to some degree.

This is not a technology failure. It is a systemic one. The infrastructure that moves data from point of sale to campaign optimization platform has too many handoffs, is too slow, and degrades data quality along the way. By the time actionable insights arrive, the decisions have already been made on proxies, intuition, or not at all.

At its core, this is not just a measurement problem. It is a signal quality and operationalization problem. The industry has the tools to measure what happened. What it lacks is the operational infrastructure to act on the right signals while a campaign is still in flight.

The path forward is already visible. A growing cohort of marketers has moved beyond proxy metrics by grounding campaigns in verified purchase signals and shortening the data path between a transaction and an optimization decision. With the right data in place, AI delivers on its full potential. This report outlines what marketers need to prioritize now to close the gap and compete on outcomes rather than approximations. The marketers who act now will define the next era of marketing performance.

Based on a survey of 210 senior marketing leaders across brands and agencies conducted in March 2026, *Measurement's Tipping Point* quantifies the cost of this gap and maps the path beyond it. The findings are clear:

1. **The waste is measurable and significant.**
More than two-thirds of marketers estimate that at least 11% of their budget is wasted due to optimization lag. More than a third believe the figure exceeds 26%. At current industry spending levels, that represents an enormous and largely avoidable loss.

2. **Proxy metrics are less reliable than the industry admits.**
More than four in five marketers rely primarily on signals other than verified purchase data when optimizing campaigns in flight, defaulting instead to engagement metrics, modeled outputs, or brand lift metrics. When those proxy-driven decisions are later reconciled against actual sales outcomes, roughly 35% of marketers find they don't hold up. That's not a margin of error. It's systematic misdirection.

3. **The barriers to better optimization are systemic, not singular.**
Data latency, limited access to transaction data, privacy constraints, internal processes, and budget all emerge as equally significant barriers to purchase-based optimization. There is no single fix. The problem requires coordinated action to remove barriers and align technology, processes, and cross-functional teams.

4. **The upside is substantial and already being captured.**
Nearly half of all respondents expect double-digit ROAS gains from real-time purchase signal optimization. A meaningful early-adopter cohort, roughly one in five marketers, is already using verified purchase data as a primary optimization signal. The potential performance gap between these early movers and the rest is significant, and the longer the transition takes, the harder it will be to close.

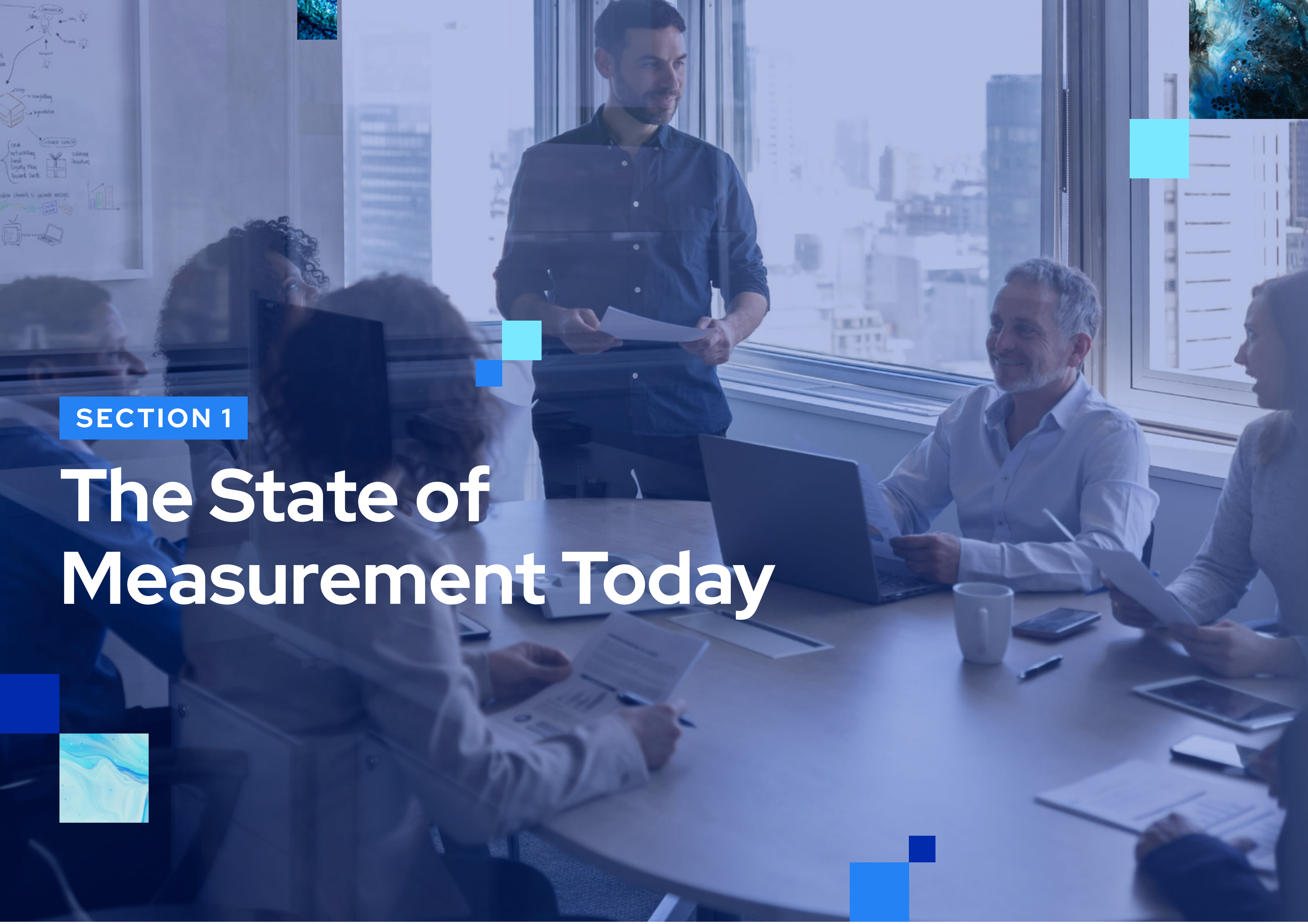
5. **AI is ready, but the data feeding it isn't.**
More than three-quarters of campaign optimization involves some degree of automation, but only 20% is fully automated. Data quality is the single biggest factor limiting AI's effectiveness, cited far more often than any other barrier. This is the sharpest insight in the report: AI is only as good as the signals feeding it. Without deterministic, timely purchase data, AI optimization remains incremental. With it, it becomes transformative.

This report is both a diagnosis and a call to action.

It calls for a fundamental shift: from post-campaign reporting to continuous, in-flight optimization. That requires not just better measurement after the fact, but better signals feeding decisions in real time. That is exactly what this report examines and why the findings matter.

The industry has reached an inflection point where the marketers who move first on verified purchase signals, shorter data paths, and AI built on deterministic inputs will not just improve their efficiency metrics, they will build the kind of accountable, outcome-driven marketing infrastructure that earns lasting organizational trust and a stronger competitive position.

The tools are maturing. The data is available. The case for action has never been clearer.



SECTION 1

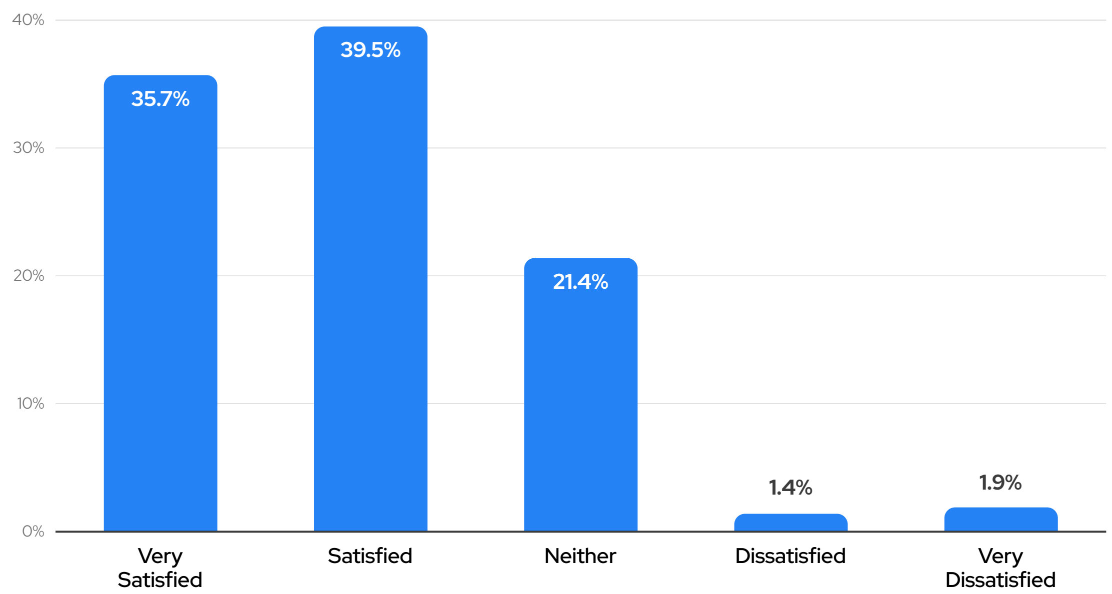
The State of Measurement Today

There's a paradox at the heart of modern marketing measurement: the tools are good enough to report performance, but not good enough to truly optimize it.

Most marketers, 75% of all respondents, say they are at least satisfied with their measurement and optimization tech stack. That sounds like good news. But satisfaction with tools and confidence in results are two very different things, and this report reveals a significant gap between them.

Agency marketers are notably more satisfied than their brand counterparts, at 89% versus 72%. The people closest to media buying are the most confident in the tools. The people whose budgets are actually at stake are less so. That gap is worth keeping in mind throughout this report.

How satisfied are you with your measurement/optimization solutions?



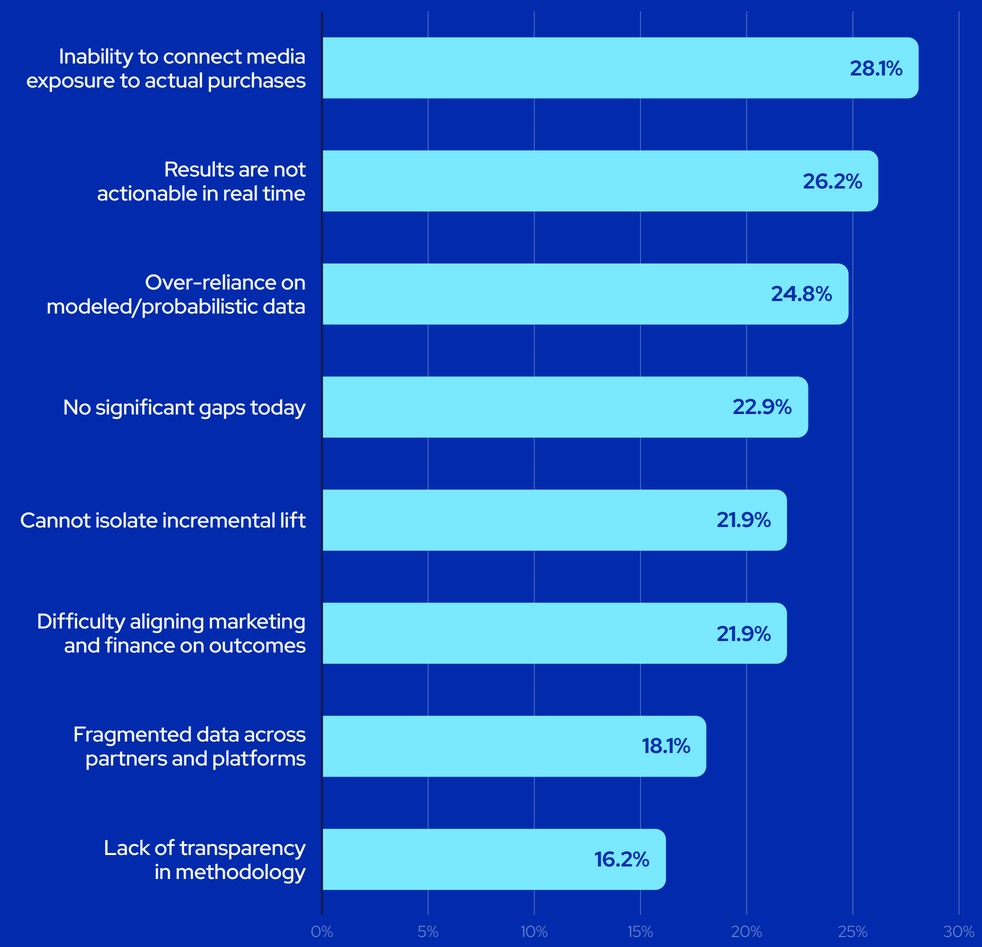
Ask those same marketers what their biggest measurement limitations are, and the paradox sharpens.

The single most cited barrier, named by 28% of respondents, is the inability to connect media exposure to actual purchases. Close behind: results that aren't actionable in real time at 26%, and an over-reliance on probabilistic data at 25%. Nearly 22% say they cannot isolate incremental lift, and another 22% report difficulty aligning marketing and finance on outcomes.

> **Marketers are broadly satisfied with tools that still can't answer the most fundamental question in advertising: did this spend drive a sale?**

Notably, 23% of respondents said they see no significant gaps in their current measurement approach. Given that 91% of the same respondent pool believe their platform results are overstated to some degree (a finding explored in depth in Section 3), the absence of perceived gaps may itself be a symptom of the problem. You cannot identify what you cannot measure.

What limitations do current measurement approaches have in proving true incremental sales impact?

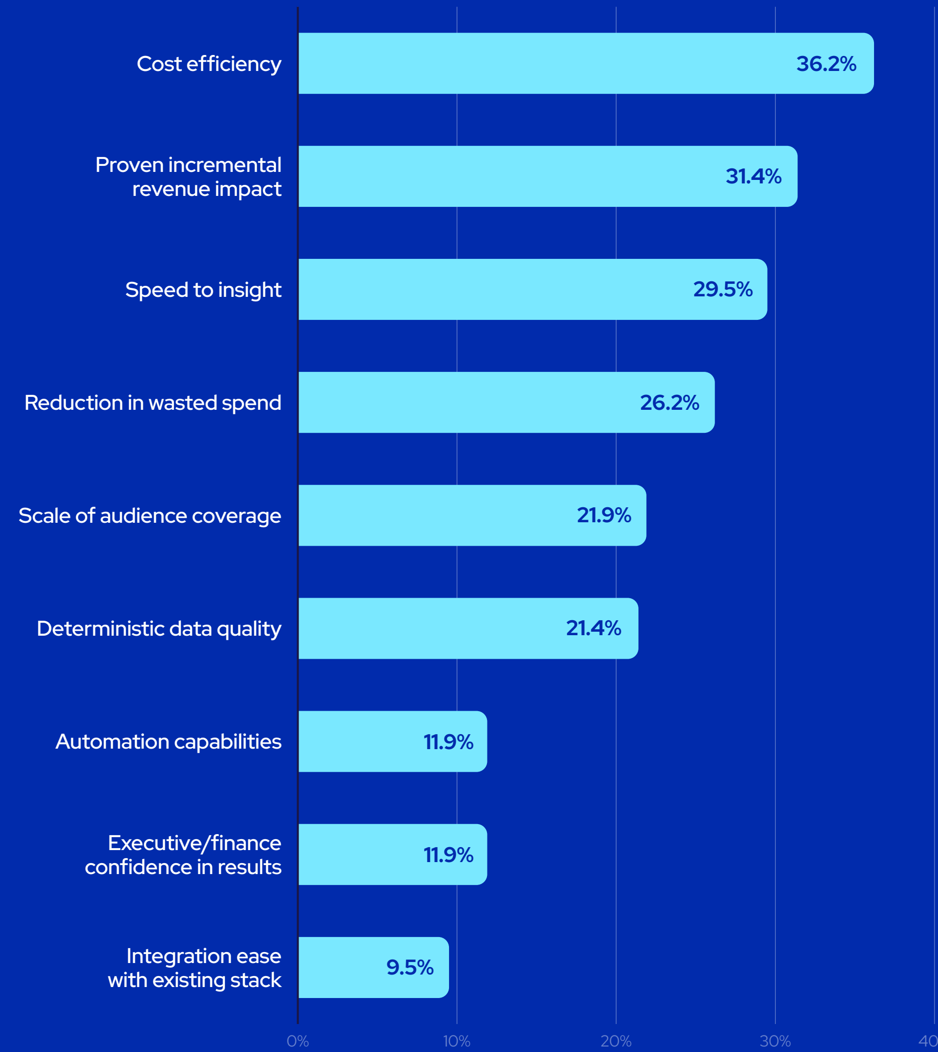


The investment priorities of those same marketers help explain why the gap persists. When evaluating measurement solutions, cost efficiency ranked first, cited by 36% of respondents as a top value driver. Proven incremental revenue impact came second at 31%, followed by speed to insight at 30% and reduction in wasted spend at 26%.

Marketers are optimizing for what tools cost before optimizing for what they deliver.

Until proven revenue impact consistently outranks cost efficiency as a buying criterion, the industry will keep selecting tools that are affordable rather than transformative.

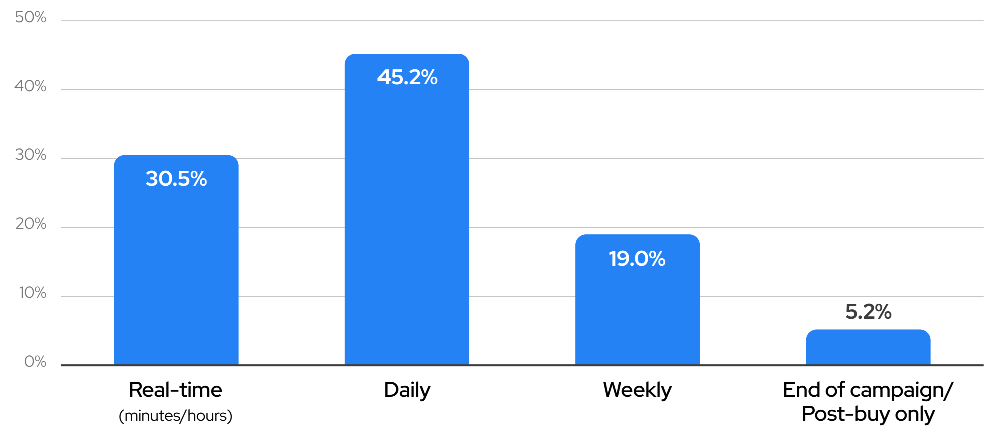
When evaluating outcome-based measurement or optimization solutions, what defines value for you?



The data access gap compounds this further. While 45% of respondents receive actionable data daily, only 30% receive it in real time. Another 4% wait until the end of a campaign or post-buy, meaning they make no in-flight optimization decisions at all based on timely data.

Receiving data quickly and receiving the right data quickly are two different things. Thirty percent get data in real time, but 26% still cite the inability to act on real-time results as a core limitation, because the data arriving fastest is rarely the data that proves a sale.

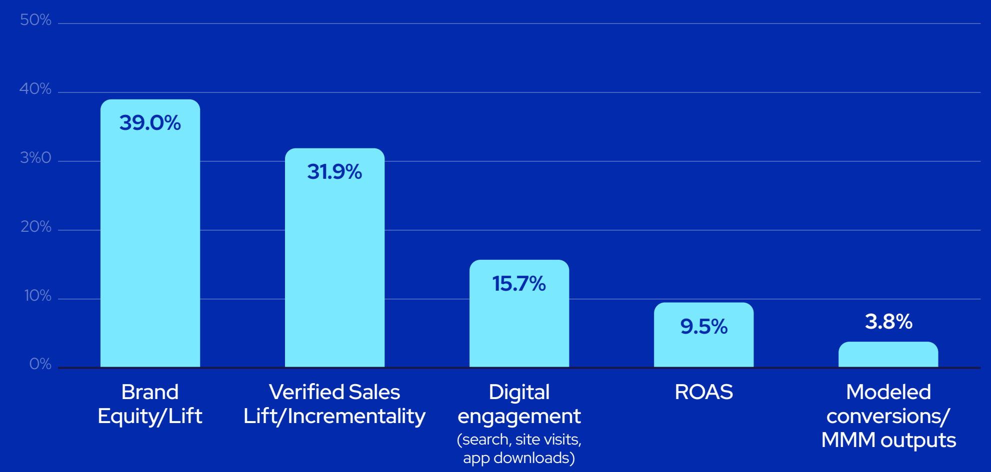
When a campaign is live, how long does it typically take your team to receive actionable data?



How marketers defend their budget allocations reflects the same tension. Brand lift remains the dominant metric for justifying spend, trusted most by 39% of all respondents. Verified sales lift and incrementality came second at 32%, with digital engagement at 16% and ROAS at just 10%.

In a tightening budget environment, defending investment with metrics that measure perception rather than purchase is an increasingly difficult position to hold. Finance teams are asking harder questions, and brand lift alone is rarely sufficient to answer them.

Which outcome metric do you trust most to guide or defend your budget allocation?



The brand-versus-agency divide running through this data is worth establishing here, as it shapes the findings in every section that follows. Brand marketers are more likely to maintain a predefined split between brand and performance objectives, at 35%. Agency marketers are more likely to shift budgets dynamically based on in-flight performance signals, at 41%.

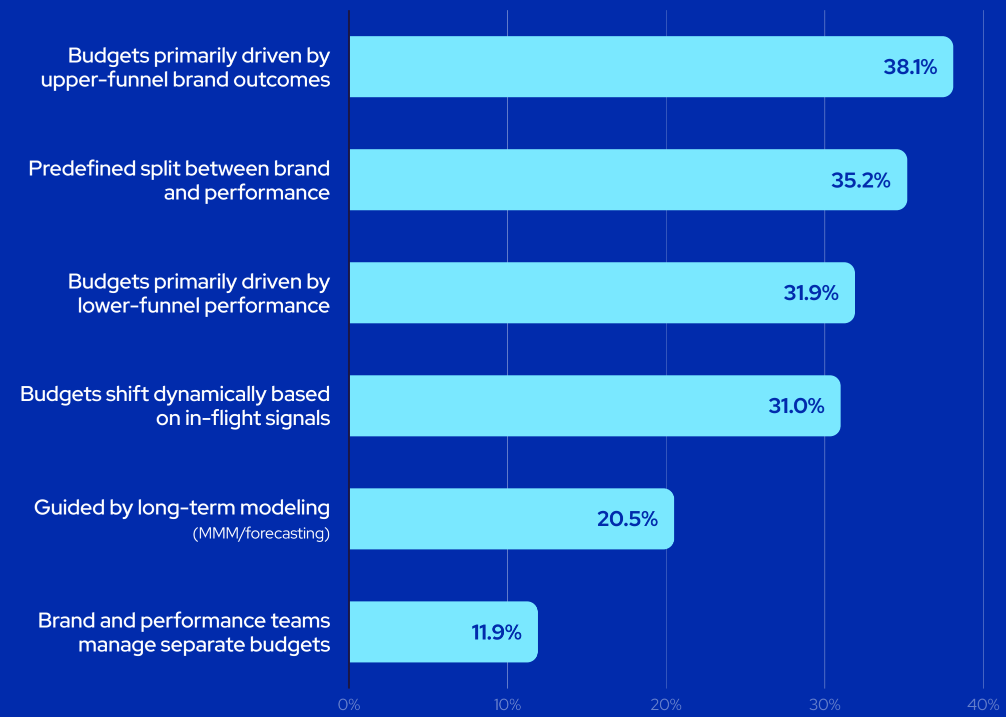
This difference runs deeper than tactics. Agencies shifting budgets dynamically based on in-flight signals are, by definition, more exposed to the quality of those signals. Brand marketers maintaining predefined splits have more insulation from bad data, but less ability to act when conditions change. Both approaches carry risk. They just carry different kinds.

Damian Garbaccio, Chief Commercial & Marketing Officer at Affinity Solutions, puts it plainly: "Marketers have spent years optimizing the wrong thing. They've built sophisticated stacks to measure what's easy to measure, not what actually matters. The result is a generation of tools that tell you a lot about how your campaign performed and very little about whether it drove a sale. That's not a data problem. It's a prioritization problem, and it starts with what we choose to buy."

The satisfaction marketers express with their current tools should be read less as endorsement and more as accommodation. They have adapted to working within constraints that the industry has normalized over the years.

The sections that follow examine what those constraints are actually costing: wasted budget, inflated results, and optimization decisions based on signals that don't reliably predict sales.

How does your organization balance investments between upper-funnel brand and lower-funnel performance outcomes?



> Marketers have spent years optimizing the wrong thing. They've built sophisticated stacks to measure what's easy to measure, not what actually matters.

Damian Garbaccio
Chief Commercial & Marketing Officer
at Affinity Solutions

SECTION 2

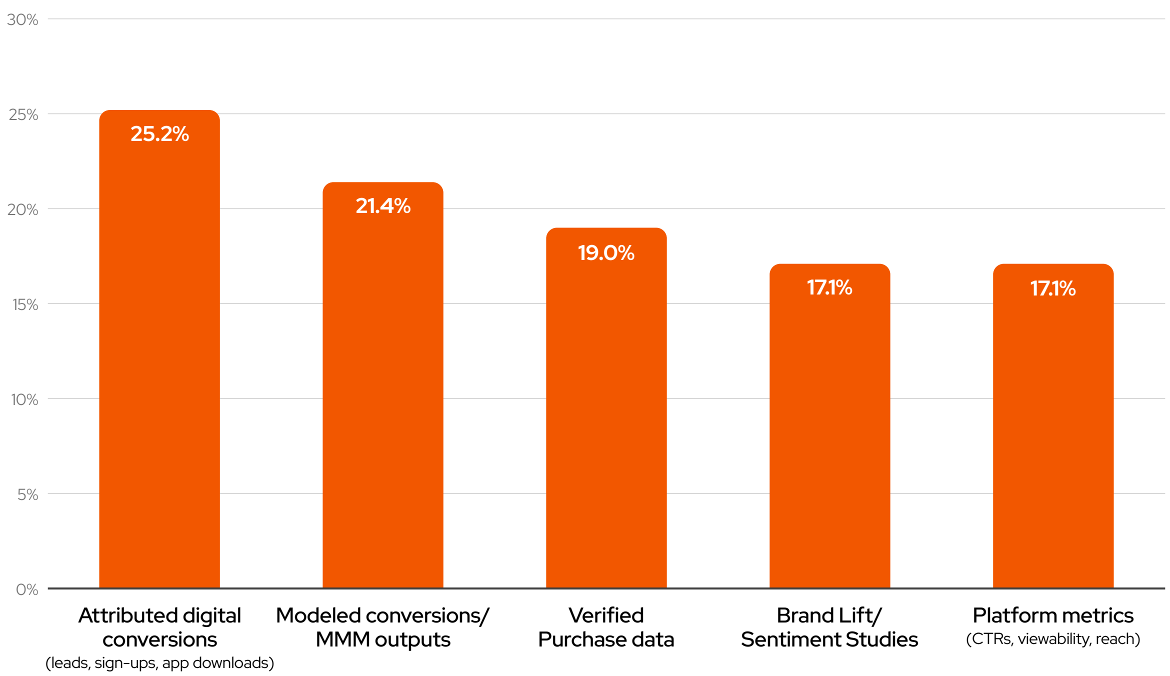
The Signals Informing Decision-Making

When a campaign is live and budget decisions need to be made, marketers reach for the fastest signal available. For more than four in five marketers, that signal is something other than verified purchase data.

Attributed digital conversions such as leads, sign-ups, and app downloads are the most common primary in-flight optimization signal, cited by 25% of respondents. Modeled conversions and MMM outputs came second at 21%, followed closely by verified purchase data at 19% (nearly tied with brand lift/sentiment studies at 17%).

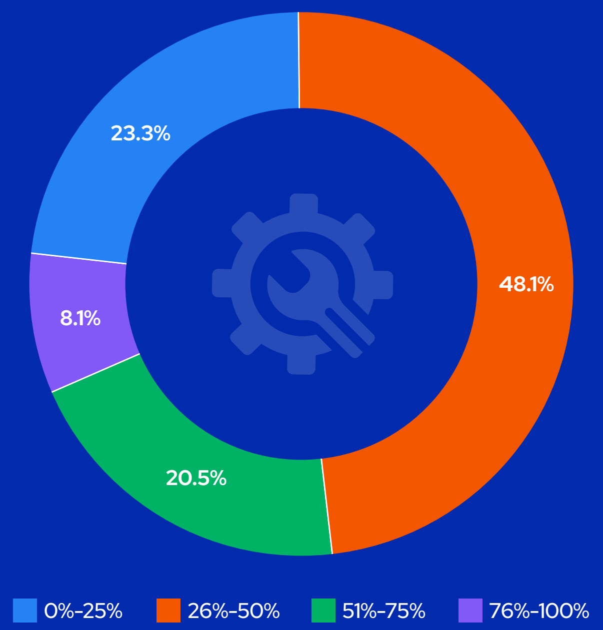
The fact that verified purchase data is already a primary signal for a meaningful share of marketers is significant: real-time purchase optimization isn't a future aspiration for everyone. A clear early-adopter cohort already exists. The gap is that the majority haven't yet made the transition.

What is your primary in-flight optimization signal today?



The proxy reliance problem runs deep. When asked what share of their optimization decisions are based on proxy metrics, 48% of respondents said 26-50%, another 20% said 51-75%, and 8% said 76-100%. The majority default to attributed digital conversions, modeled outputs, brand lift studies, or platform metrics like CTRs and viewability. The industry is running primarily on signals that were never designed to confirm a sale.

What percentage of your optimization decisions are based on proxy metrics?



That would be acceptable if proxies were reliably predictive. But when marketers reconcile those proxy-driven decisions against actual sales outcomes, the picture is more complicated.

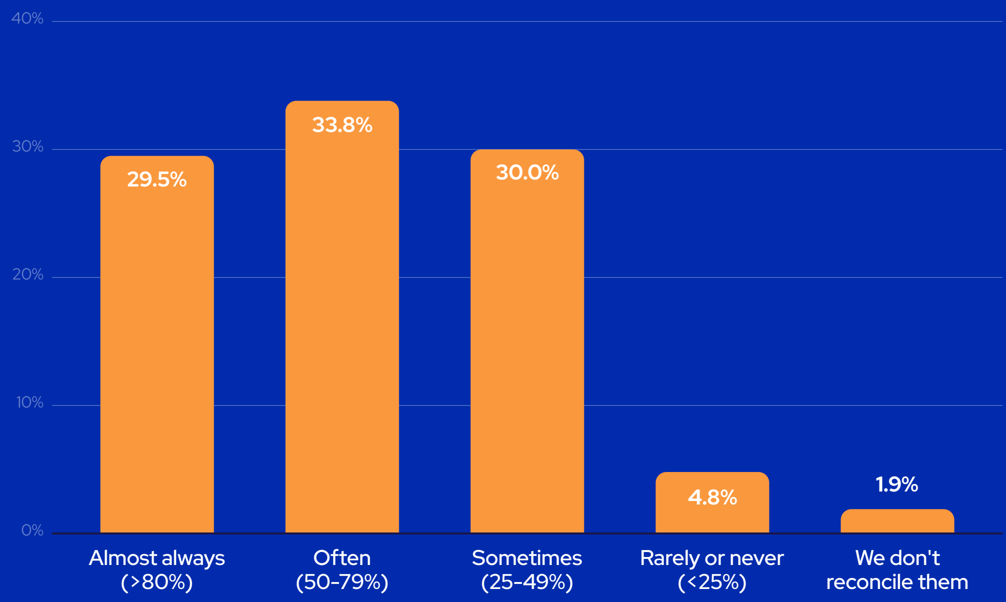
While 30% of respondents say their proxy decisions hold up almost always and 34% say often, a nearly equal 30% say they hold up only sometimes. Another 5% say rarely or never. Roughly 35% of marketers find their proxy-driven decisions unreliable when tested against real sales data.

In a discipline that prides itself on accountability, that's not a measurement gap. It's a confidence problem hiding in plain sight.

Doug Campbell, Chief Strategy Officer at DoubleVerify, frames the stakes: "Marketers face an impossible choice; act on signals that are fast but unreliable, or wait for accurate data that arrives too late. When two-thirds say their proxy-driven decisions only hold up half the time against actual sales, that's not a measurement gap – that's systematic waste. Closing it requires verified outcomes at the speed of AI decision-making."

So why haven't more marketers made the switch to purchase-based optimization? The barriers are real and evenly distributed.

When you reconcile proxy-metric-driven optimization decisions against actual sales outcomes, how often do results hold up?



> When two-thirds [of marketers] say their proxy-driven decisions only hold up half the time against actual sales, that's not a measurement gap – that's systematic waste.

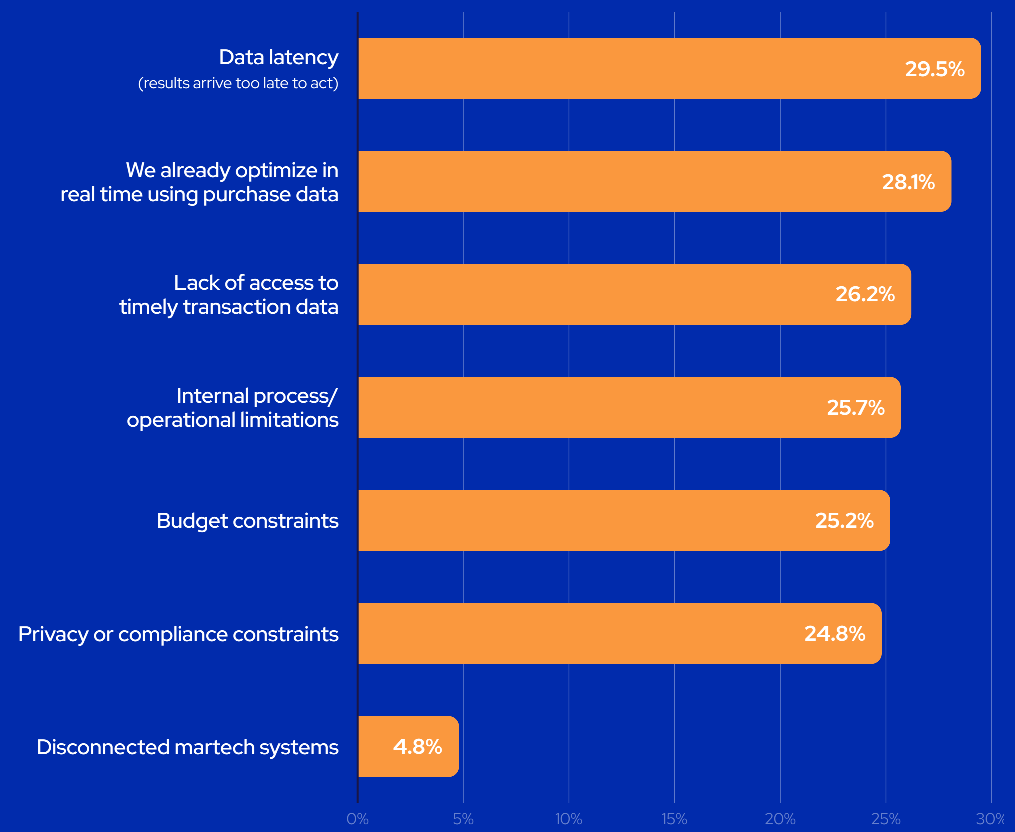
Doug Campbell
Chief Strategy Officer at DoubleVerify

Among those not yet optimizing on verified purchase data, data latency topped the list at 30%, followed closely by internal process limitations at 26%, lack of access to timely transaction data at 26%, budget constraints at 25%, and privacy constraints at 25%.

The near-equal spread across every category is itself a finding: there is no single bottleneck to fix. The problem is systemic, embedded across technology, process, and organizational structure simultaneously.

It's also worth noting that many marketers are still focused on getting their own first-party data under control before they can realistically layer in third-party purchase signals. The barrier isn't always external. Often, it's internal readiness.

What prevents your organization from optimizing campaigns in real time based on verified purchase behavior?



> The technology and access to data have improved drastically over the past few years and a review of how your marketing is being measured is worth doing if you haven't in the past 24 months.

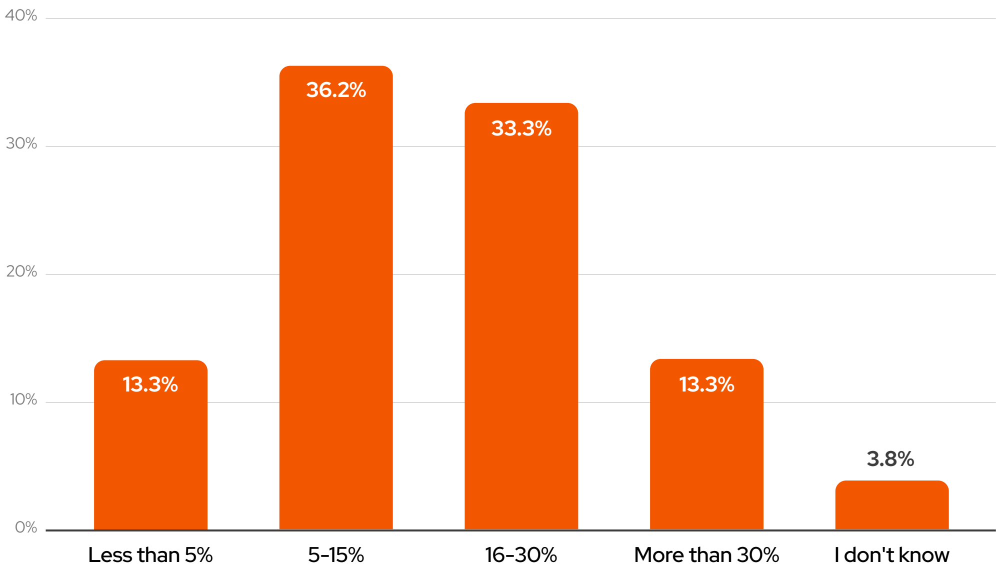
Nishat Mehta
CEO at Lexitas

Despite those barriers, the potential upside is clear and compelling. Asked what ROAS lift they would conservatively expect from real-time purchase-signal optimization, 36% of respondents said 5-15%, and 33% said 16-30%. Another 13% expect more than 30% improvement.

Agency marketers were notably more optimistic, with nearly half expecting gains of 16-30% compared to a third of brand marketers. Those closest to media buying appear to see the upside most clearly, which may reflect greater visibility into how much performance is currently being left on the table.

Combined, nearly half of all respondents expect double-digit ROAS gains, a figure that makes the cost of inaction increasingly difficult to justify.

If you could optimize in real time with verified purchase signals, what lift in ROAS would you expect?



Nishat Mehta, CEO at Lexitas, puts the opportunity in broader context, "I was surprised to see in these results that a significant number of marketers continue to use proxy metrics instead of actual purchase data to measure the performance of their advertising. Additionally, many that use purchase data focus only on their first-party data rather than an industry-wide metric that teases out share gains vs. rising tides. The technology and access to data have improved drastically over the past few years and a review of how your marketing is being measured is worth doing if you haven't in the past 24 months."

The picture that emerges is not one of an industry paralyzed by inaction. It is one of an industry in transition, with a meaningful cohort already operating on verified purchase signals, a large middle group aware of the problem but blocked by systemic barriers, and a clear financial case for accelerating the shift.

The question is no longer whether purchase-based optimization delivers value. The question is how quickly the structural barriers can be dismantled.

SECTION 3

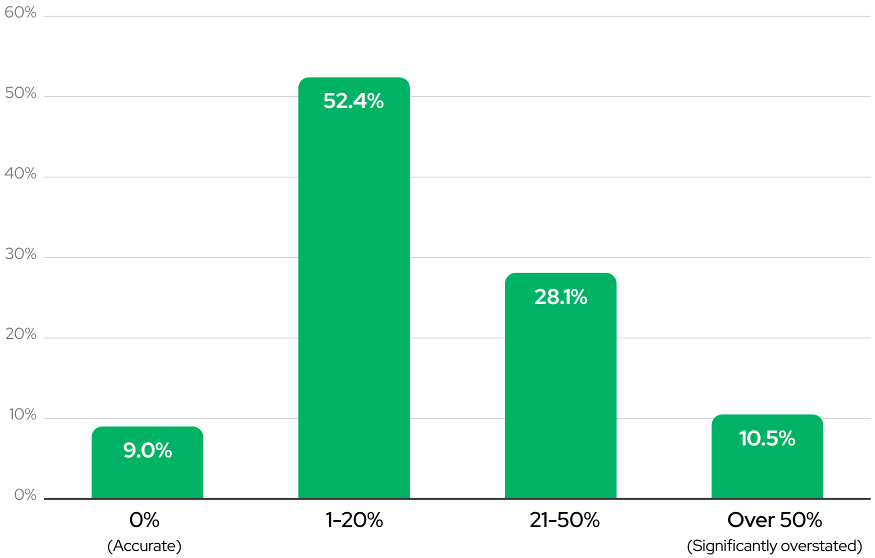
Barriers to Full Optimization

Most marketers have made a quiet peace with proxy metrics. The previous section showed that while 35% find their proxy-driven decisions unreliable against actual sales, the majority carry on, trusting signals more than the data warrants. This section examines what that accommodation is actually costing.

Start with what may be the most underappreciated number in this entire report: 91% of marketers believe their platform-reported results are overstated to some degree. Only 9% believe their current results are fully accurate. Of the rest, 52% believe their results are inflated by 1-20%, 28% believe they are inflated by 21-50%, and 10% believe they are inflated by more than 50%.

One in ten marketers believes that more than half of what their platforms are reporting as success are not entirely accurate.

How much 'performance inflation' (overstated) results exist in your current platform-reported results?



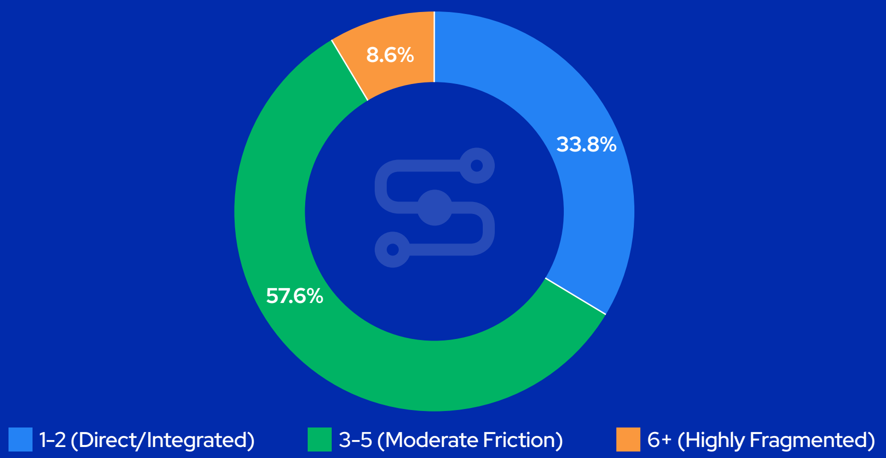
This is the context in which every other barrier in this section should be read. The industry isn't just struggling to optimize in real time. It is optimizing against numbers that most participants already suspect are wrong. That combination of latency and inflation means marketing decisions are being made slowly, on data that is both delayed and unreliable.

The cumulative cost is measurable: A 2023 ANA study found that as much as 23% of total open web programmatic investment, roughly $20 billion, is wasted due to supply chain inefficiencies. The ANA attributed part of the problem to the same dynamic that our data surfaces (in Q8): "Advertisers prioritize cost over value, sometimes to their own detriment." Our respondents confirmed it, ranking cost efficiency as their top buying criterion for measurement tools, ahead of proven revenue impact.

The data path itself is a primary culprit. For 58% of respondents, the journey from point of sale to campaign optimization platform involves 3-5 touchpoints. Another 9% operate in highly fragmented environments with 6 or more hops between transaction and activation. Only 34% have direct or integrated data paths with 1-2 touchpoints.

Every additional hop adds latency, increases the risk of data degradation, and widens the gap between what happened and when a marketer can act on it.

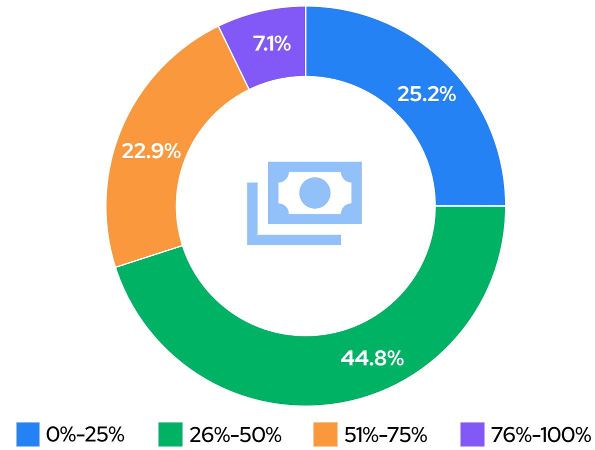
How many 'hops' does data take from the point of sale to your campaign optimization platform?



The direct consequence of that friction shows up in budget exposure. When asked what percentage of their media budget operates without in-flight optimization due to data latency, 45% of respondents said 26-50% of their budget runs without optimizations. Another 23% said 51-75%, and 7% said 76-100%.

For a significant share of marketers, the majority of their media investment is running without in-flight adjustment, not by choice, but because the data simply isn't available in time.

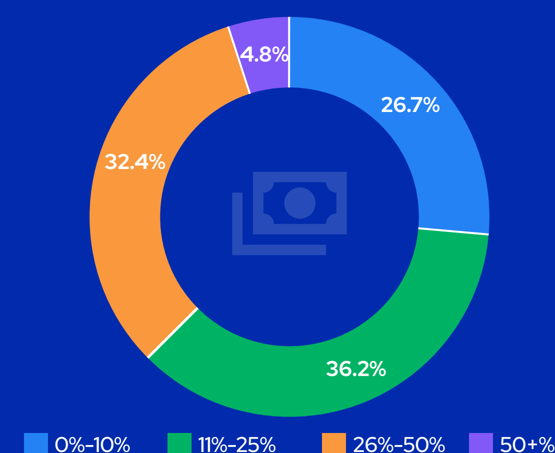
What percentage of your media budget operates without in-flight optimization due to data latency?



The financial toll of this is something marketers feel acutely. When asked to estimate how much of their budget is wasted due to optimization lag, 36% said 11-25%, and 32% said 26-50%. Only 27% believe less than 10% of their budget is wasted this way.

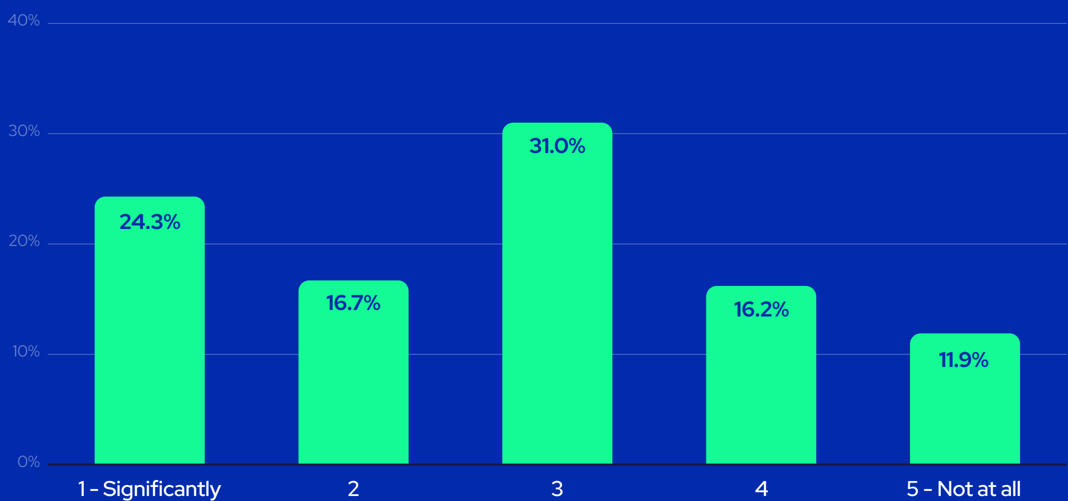
Taken together with the performance inflation finding, the picture is stark: significant portions of budgets are running without optimization, and the results they generate are being reported in inflated terms that obscure the true scale of the problem.

What percentage of your marketing budget is wasted due to optimization lag?



Privacy constraints add another layer of complexity. Only 12% of respondents say privacy has no impact on their ability to optimize. Twenty-four percent say it significantly limits their effectiveness, and the majority fall somewhere in between. The practical effect is that even marketers who have invested in shortening their data paths are operating with one hand tied behind their back when it comes to activating those signals against audiences.

Do privacy constraints limit your ability to optimize effectively?

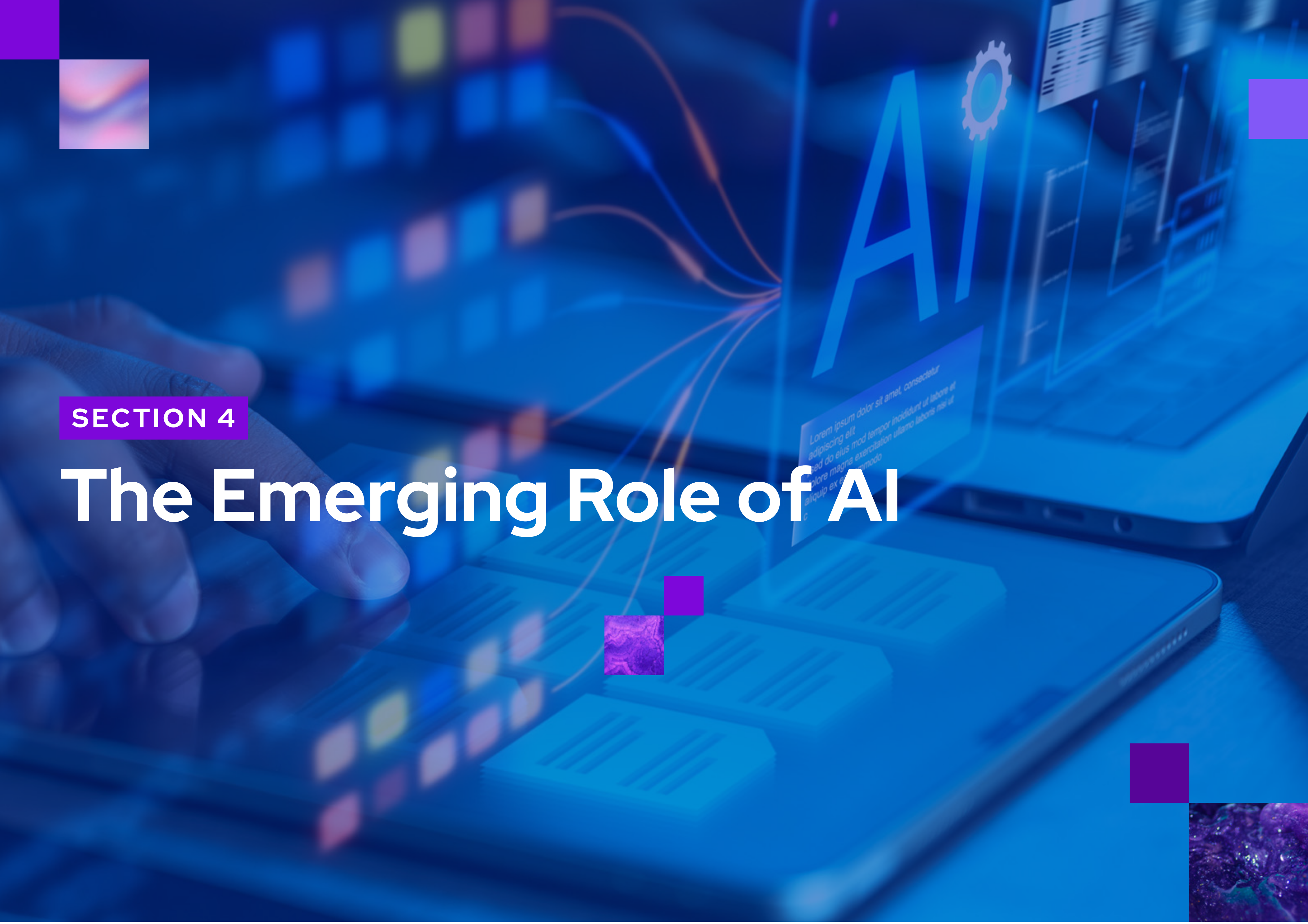


Damian Garbaccio, Chief Commercial & Marketing Officer at Affinity Solutions, connects these barriers into a single diagnosis: "Every hop data takes between a transaction and a targeting decision is a tax on performance. Most marketers are paying that tax without knowing it, running campaigns against yesterday's signals while their competitors act on today's. The solution isn't more data. It's shorter paths to the data that already exists."

These barriers don't operate independently. Fragmented data paths create latency. Latency forces reliance on proxies. Proxy reliance produces decisions that are tested against inflated platform results, which masks how unreliable those decisions actually are.

Privacy constraints make every step harder to fix. The result is a system that is self-reinforcing in the wrong direction, where the difficulty of measuring true outcomes makes it easier to keep accepting inadequate substitutes.

Breaking that cycle requires addressing these barriers as a system, not a checklist. The marketers and technology partners who treat this as a foundational infrastructure problem are the ones most likely to close the gap. And as the next section shows, AI has the potential to accelerate that process dramatically, but only if the data it depends on is clean, timely, and connected to real outcomes.



SECTION 4

The Emerging Role of AI

The previous three sections have told a story of an industry that knows what it needs – verified, real-time purchase signals — but hasn't yet built the infrastructure to act on them consistently. Artificial intelligence is the technology most likely to close that gap.

But the data reveals something important: AI isn't being held back by capability. It's being held back by the same data quality and fragmentation problems documented throughout this report.

The breadth of AI adoption in marketing is genuine. Forecasting is the most common application, used by 37% of respondents, followed by creative optimization at 33% and targeting at 28%. Budget allocation and reporting automation each account for around 19%. A little less than 19% report limited AI use, meaning the vast majority of marketing organizations have moved beyond experimentation into active deployment.

How is AI currently used in your marketing organization?

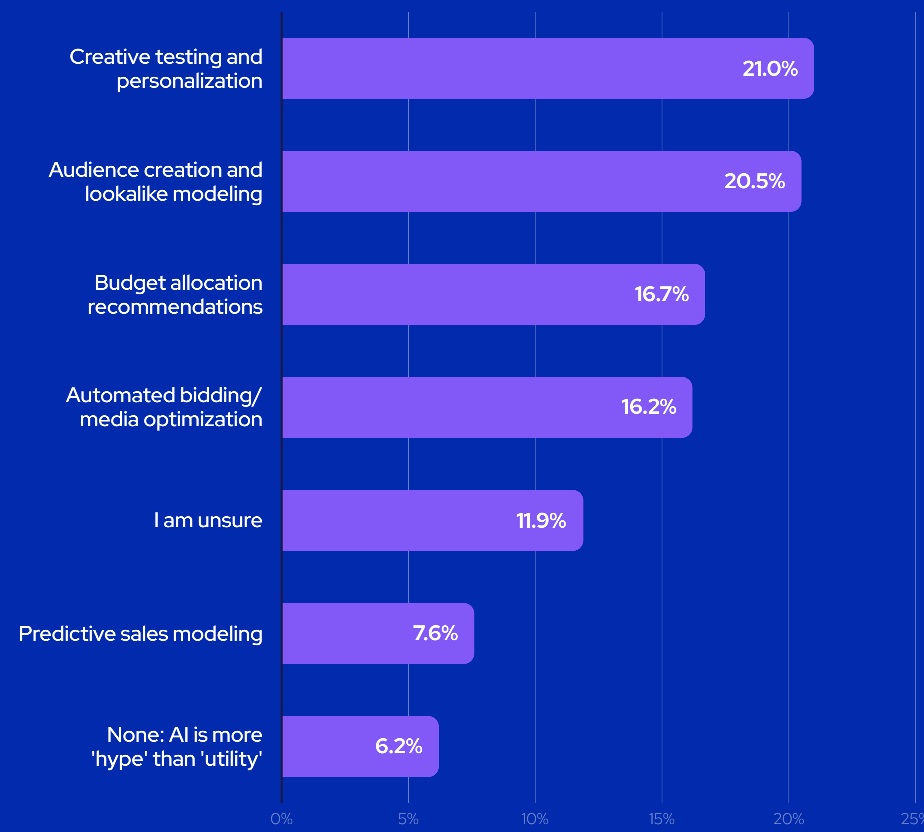
Where AI is delivering the most measurable value tells a more nuanced story.

Creative testing and personalization leads at 21%, followed closely by audience creation and lookalike modeling at 20% and budget allocation recommendations at 17%. These applications share a common characteristic: they operate closer to data that's in the marketer's direct control (first-party, behavioral, etc.) than the purchase signals and cross-platform attribution data where confidence breaks down.

It follows that AI adoption lags precisely where data quality is most in question: real-time purchase signals, cross-platform attribution, and deterministic outcomes.

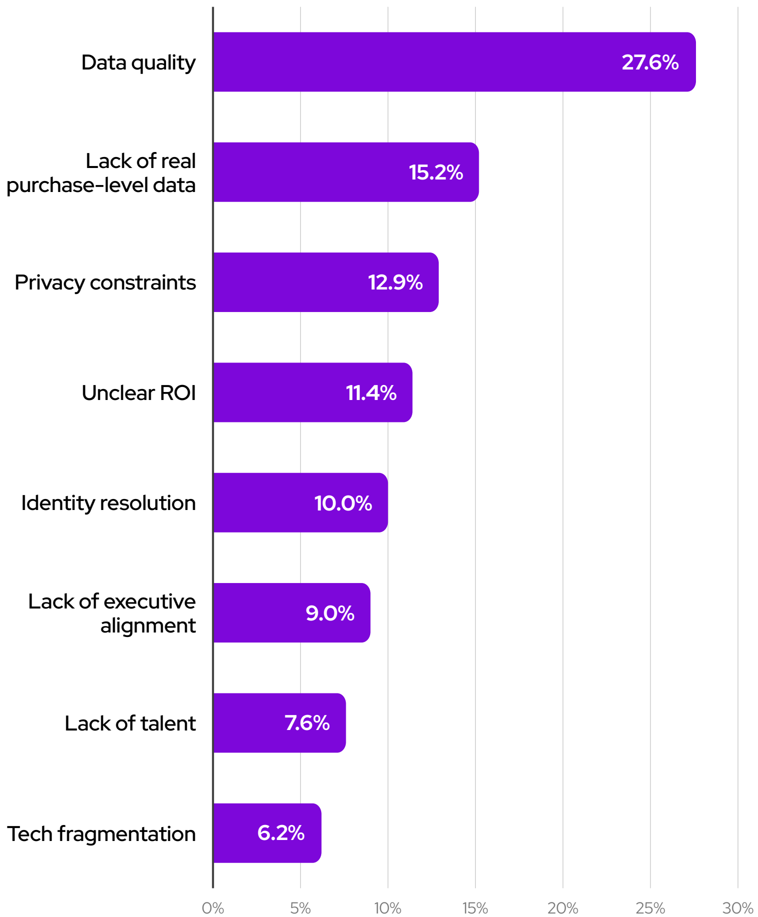
Agencies are leading on budget allocation, with 35% reporting AI-driven budget allocation compared to the broader average of 17%. This reflects their role managing spend across multiple clients, and offers a preview of where brand marketing organizations are likely headed as AI budget tools mature.

Where is AI providing the most measurable value in your current workflow?



That connection between data quality and AI effectiveness is explicit in what marketers identify as AI's biggest limitations. Data quality tops the list at 28%, cited more often than any other factor. Lack of real purchase-level data follows at 15%, with privacy constraints at 13% and unclear ROI at 11%. The barriers limiting AI's effectiveness are not algorithmic. They are the same data access and quality barriers that have appeared in every section of this report.

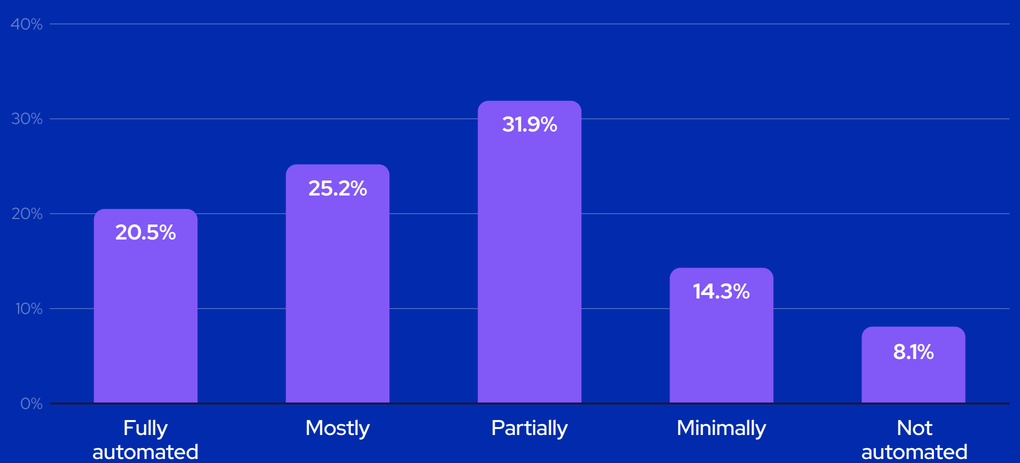
What is the biggest factor limiting AI's effectiveness?



The automation picture reflects this reality. Campaign optimization today exists on a wide spectrum: 20% of respondents describe their optimization as fully automated, 25% as mostly automated, and 32% as partially automated. Another 14% are minimally automated and 8% are not automated at all.

The good news is that 45% of marketers are operating at a high level of automation. The challenge is the significant tail (more than a fifth of the industry) that remains largely manual, and the broad middle group whose partial automation masks substantial gaps in coverage and data quality.

To what extent is your campaign optimization automated today?



What's preventing the rest from getting there? The constraints are revealing.

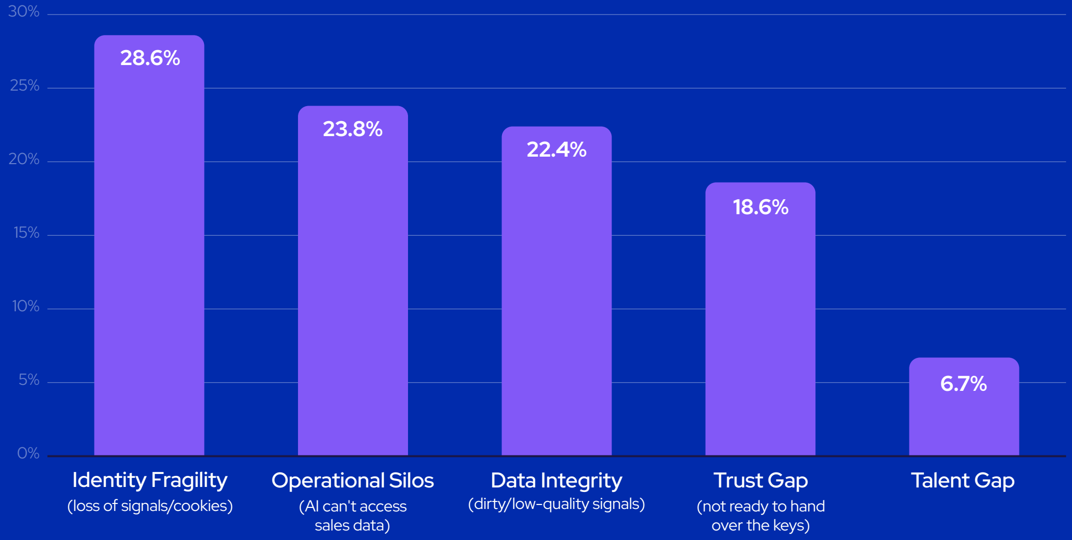
Identity fragility (loss of signals and cookies) tops the list at 29%, followed by operational silos at 24% and data integrity at 22%. But the fourth-ranked barrier deserves more attention: 19% of respondents cited a trust gap, describing themselves as simply not ready to hand over the keys to automated systems. That's not a technical problem. It's a human one, and it points to an adoption challenge that better data and infrastructure alone won't solve.

Building confidence in AI-driven optimization requires demonstrated results, transparent methodologies, and organizational change management alongside the technical work.

This trust gap is showing up in the market in a concrete way. The mandate from marketing leadership has shifted. A year ago, organizations were willing to experiment with AI. Today they are demanding a concrete business case, specifically how AI reduces agency dependency and operational costs. The bar has moved from curiosity to accountability.

Gartner predicts that by 2028, 60% of brands will use agentic AI to facilitate personalized, autonomous engagement at scale. That future is closer than it appears, but it depends entirely on resolving the data quality and trust barriers our respondents identified today.

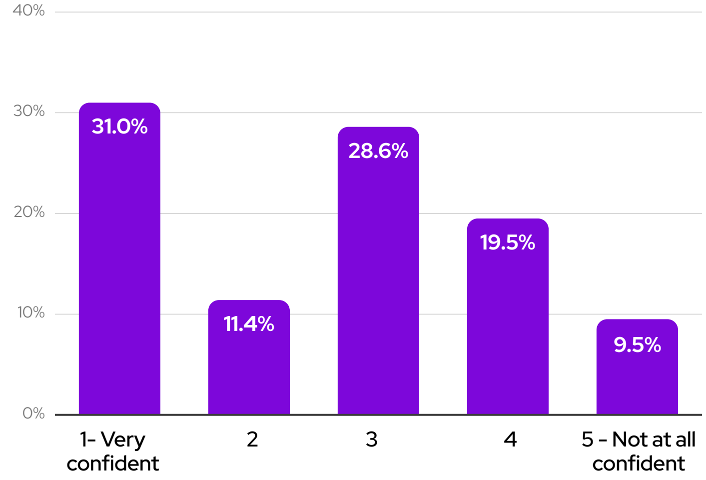
What is the primary constraint preventing AI from fully automating your campaign optimization?



The data confidence picture reinforces this. When asked how confident they are in the quality of data feeding their AI systems, 31% say very confident, the single largest group. But 29% are neutral, 20% are somewhat confident, and 10% are not confident at all.

Confidence is polarized rather than broadly high, which means a substantial share of marketers are running AI systems on data they privately doubt.

How confident are you in the quality of data feeding your AI systems?



Looking ahead, marketers are clear-eyed about what AI will displace. Media mix modeling is seen as the most vulnerable tool, cited by 37% of respondents as likely to be replaced by continuous AI-driven optimization platforms within two to three years.

Agency respondents told a different story: audience segmentation tools topped their list at 38%. The divergence reflects each group's day-to-day reality. Brands depend heavily on MMM for budget justification. Agencies, managing spend across multiple clients, are more focused on how audiences are built and targeted.

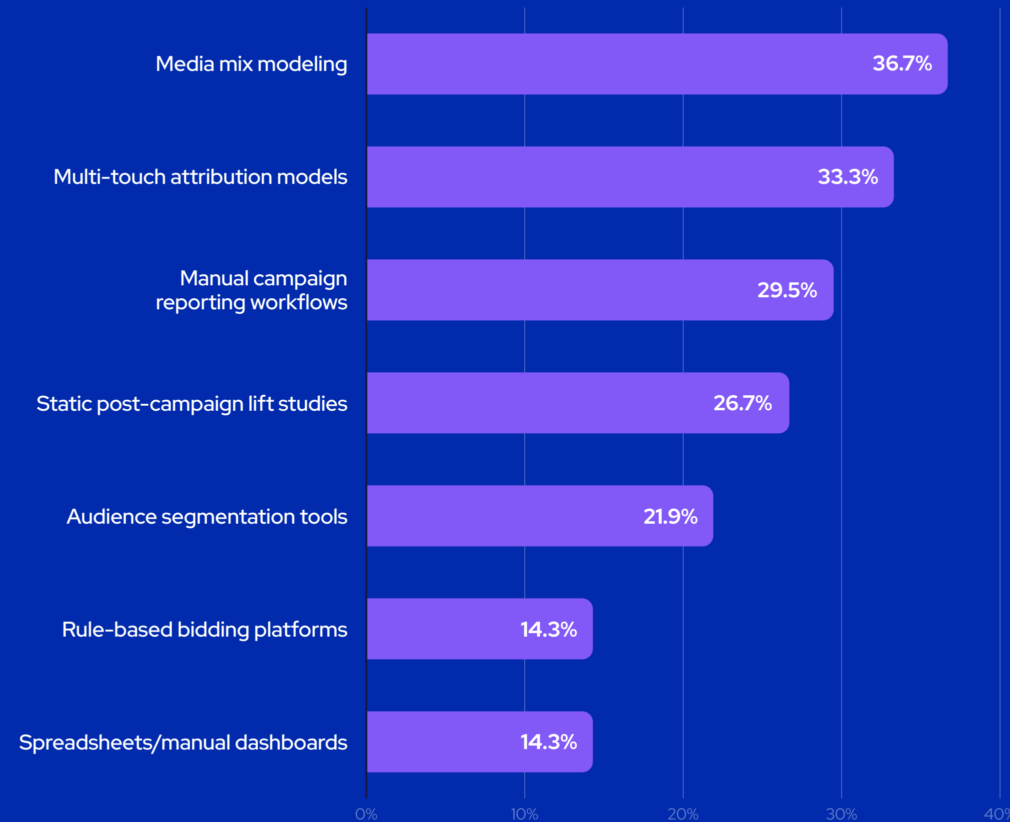
Both groups are signaling the same underlying shift: the tools built for a slower, less connected measurement world are running out of time.

Chase Miller, Chief Growth Officer at Claritas, captures where all of this is heading: "The future of marketing isn't AI as a tool — it's AI as the decisioning engine powered by real-world outcomes. That requires moving beyond proxy metrics to deterministic data and closing the loop between signal, action, and measurement. When those pieces come together, optimization becomes continuous, not episodic. That's where AI moves from incremental to transformative."

The leaders who will define the next era of marketing performance are already visible in this data. They are the 45% operating with full or mostly automated optimization. They are the 19% already using verified purchase data as their primary in-flight signal. They are the 31% who are very confident in the data feeding their AI systems. The gap between those marketers and the rest is not yet insurmountable, but it is widening.

The tools that today's laggards depend on are the ones the early adopters expect to be replaced within three years. There's still time to close the gap, but the clock is ticking.

Which tools are most likely to be replaced by continuous, AI-driven outcome optimization platforms in the next 2-3 years?



> The future of marketing isn't AI as a tool — it's AI as the decisioning engine powered by real-world outcomes.

Chase Miller
Chief Growth Officer at Claritas

Conclusion

The data in this report tells a story that most CMOs already feel but rarely see quantified. The gap between what marketing measures and what marketing actually delivers is costing real money, and the industry knows it.

Ninety-one percent of marketers believe their platform-reported results are overstated to some degree. More than two-thirds estimate that at least 11% of their budget is wasted due to optimization lag. Nearly a third find their proxy-driven decisions unreliable when reconciled against actual sales. These aren't edge cases or outliers. They are the operating conditions of modern marketing, normalized over years of accommodation to a system that was never designed to connect media exposure to verified purchase outcomes quickly and at scale.

The encouraging news is that the path forward is no longer theoretical. The early movers are already visible in this data: marketers who have shifted to verified purchase signals, built highly automated campaign operations, and developed genuine confidence in the data feeding their AI systems. These marketers aren't waiting for the industry to catch up. They are building the infrastructure now, and the performance gap between them and the rest will compound over time.

The agency community is already ahead. Across nearly every measure in this report, agencies express greater confidence in their tools, greater optimism about the upside of purchase-based optimization, and more advanced AI adoption for budget decisions. For brand marketers, that's not a discouraging finding. It's a roadmap. The practices agencies are running today are where brand marketing is headed.

For everyone else, three priorities should define the next 12-18 months:

1 Close the purchase signal gap.

Verified purchase data is already a primary optimization signal for nearly one in five marketers. The technology exists. The business case is clear: nearly half of all respondents expect double-digit ROAS gains from real-time purchase-based optimization. The barriers are real but solvable, and solving them is no longer optional for marketers who want to compete on performance rather than perception.

2 Shorten the data path.

Nearly two-thirds of marketers have three or more steps between a transaction and a campaign decision. Every step adds latency, degrades data quality, and widens the window of waste. CMOs should ask their technology partners a simple question: how many touchpoints stand between a sale and an optimization decision, and what would it take to cut that number in half? The answer will reveal more about an organization's measurement maturity than any dashboard.

3 Build AI on better inputs.

AI is not the bottleneck. Data quality is. The marketers who invest now in deterministic, privacy-safe purchase signals, and in the organizational trust-building required to hand more decisions to automated systems, will be the ones for whom AI becomes truly transformative rather than incrementally useful. The tools that today's laggards depend on are the ones their peers expect to be replaced within three years. That is not a distant forecast. It is a current planning reality.

The infrastructure for outcome-based optimization exists. The financial case for adopting it is overwhelming. And the competitive cost of delay is already showing up in wasted budgets, inflated results, and optimization decisions made on signals that don't reliably predict sales.

The opportunity is here. The advantage will go to those who act first.

About the Report

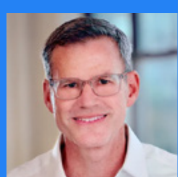
Report Overview and Survey Methodology

The Outcomes Marketing Council, established by Affinity Solutions in 2025, brings together leaders across measurement, analytics, consumer intelligence, and marketing to help advance more accountable, outcomes-based advertising. The Council focuses on emerging shifts shaping the future of media and measurement – including live sports, CTV, AI-driven optimization, and purchase-based methodologies – to help brands improve performance, strengthen measurement, and drive growth. Council members include Damian Garbaccio of Affinity Solutions, Doug Campbell of DoubleVerify, Chase Miller of Claritas, Nishat Mehta of Lexitas and former President of Circana, and Kelley O'Hara, BreakAway Data ambassador and host of the Sports Are Fun! Podcast.

The findings are based on a survey of 210 senior leaders across brands and agencies conducted in March 2026. Brand marketers accounted for 80% of respondents across retail, entertainment, automotive, technology, finance, travel, telecom, pharma, and other categories. Agency marketers accounted for 18% of respondents. The survey was designed and fielded independently by PureSpectrum, a third-party research firm, to ensure objectivity. ROAS lift figures cited in this report represent respondent expectations based on hypothetical scenarios, not demonstrated outcomes. Some questions were asked of subsets of the full sample; percentages for those questions are calculated against the relevant subset rather than the total respondent pool. All findings reflect the opinions of survey respondents and should be interpreted accordingly.

Outcomes Marketing Council Members

Damian Garbaccio
Chief Commercial & Marketing Officer at Affinity Solutions

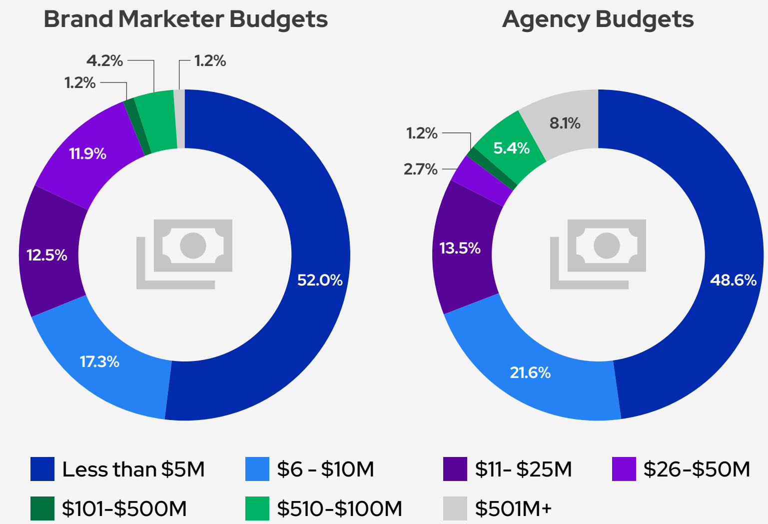


Doug Campbell
Chief Strategy Officer at DoubleVerify

Chase Miller
Chief Growth Officer at Claritas

Nishat Mehta
CEO at Lexitas, former President at Circana

Kelley O'Hara
BreakAway Data Ambassador, *Sports Are Fun!* Podcast Host



Brand marketers accounted for 80% of respondents.

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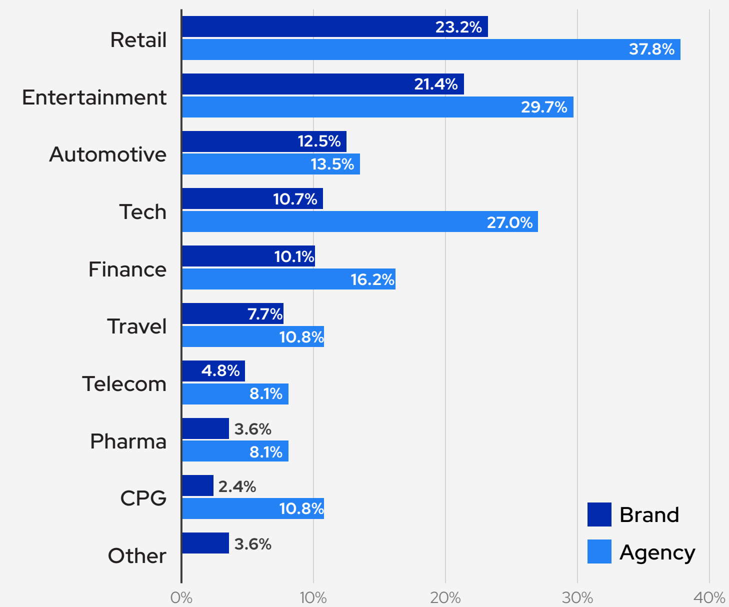

Affinity Solutions is the leading consumer purchase insights company, redefining how banks and brands engage and drive impact. Our exclusive access to fully permissioned purchase data from over 100 million U.S. and U.K. cardholders, representing 86B + transactions, enables optimized experiences and outcomes. Our proprietary AI technology, Comet™, transforms those transactions into actionable insights that drive engagement, loyalty, and measurable growth. Every great marketing story ends with a purchase. We are the final chapter: what happens when brands and banks effectively engage, inspire, and drive action.

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We Are What Happens.