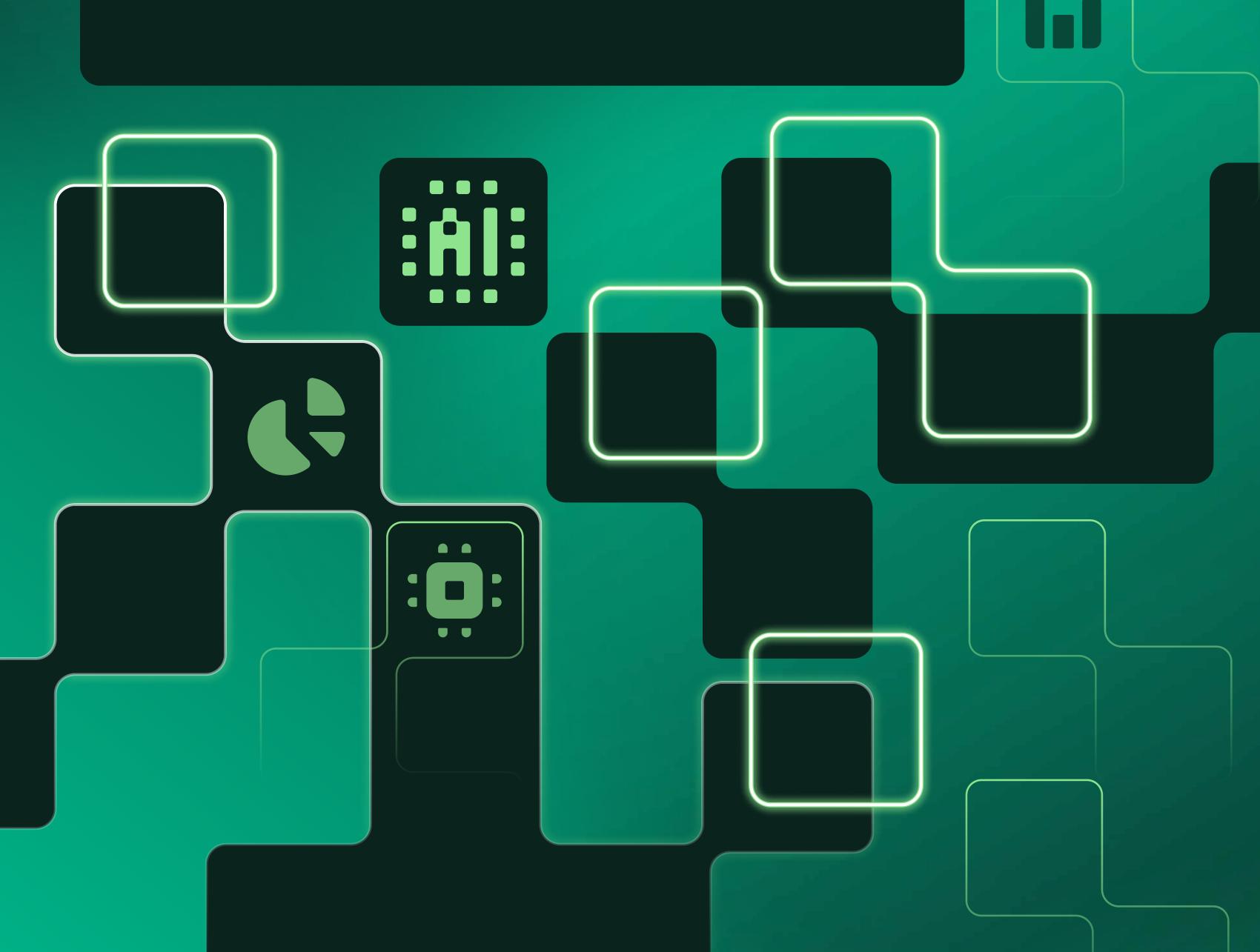
2026

#### INVOCA

## The B2C Marketing Allmpact Report

Al Ambition, Adoption, and Critical Disconnects in B2C Marketing



### The Al Decisions Made Today Will Determine Tomorrow's Winners

Al has officially rewritten how consumers buy and marketers sell. Discovery now starts in Al-native interfaces, and purchase decisions unfold through a zigzag of clicks, conversations, and Al-driven interactions. All the while, marketers are adopting Al to engage, track, optimize, and connect every touchpoint along the way.

The result is a buyer journey that rewards brands using AI to connect first-party signals end-to-end and penalizes those still treating AI as a side project. Over 80% of survey respondents said the AI winners in their category will be determined in the next 12 months, so marketers understand that this is a leaderboard moment, not a pilot year.

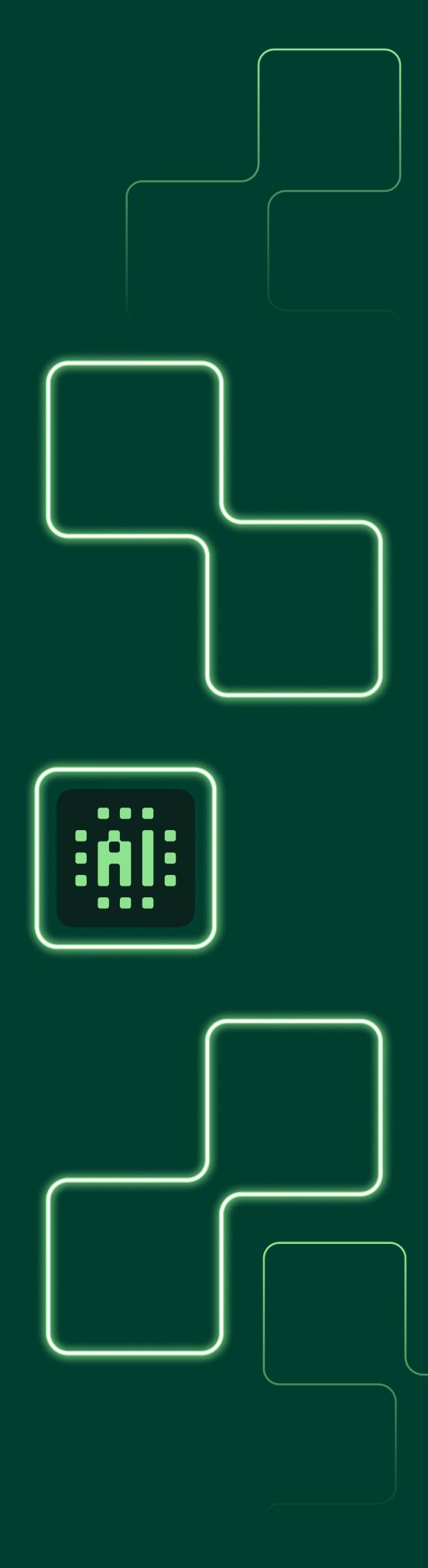
But this urgency often outpaces reality. Nearly all respondents believe that pausing AI would jeopardize 2026 targets. However, most organizations still allocate a minority of the martech budget to AI, and nearly a third think current AI spending is already too high. That disconnect signals less a lack of belief than a struggle to turn investment into measurable outcomes.

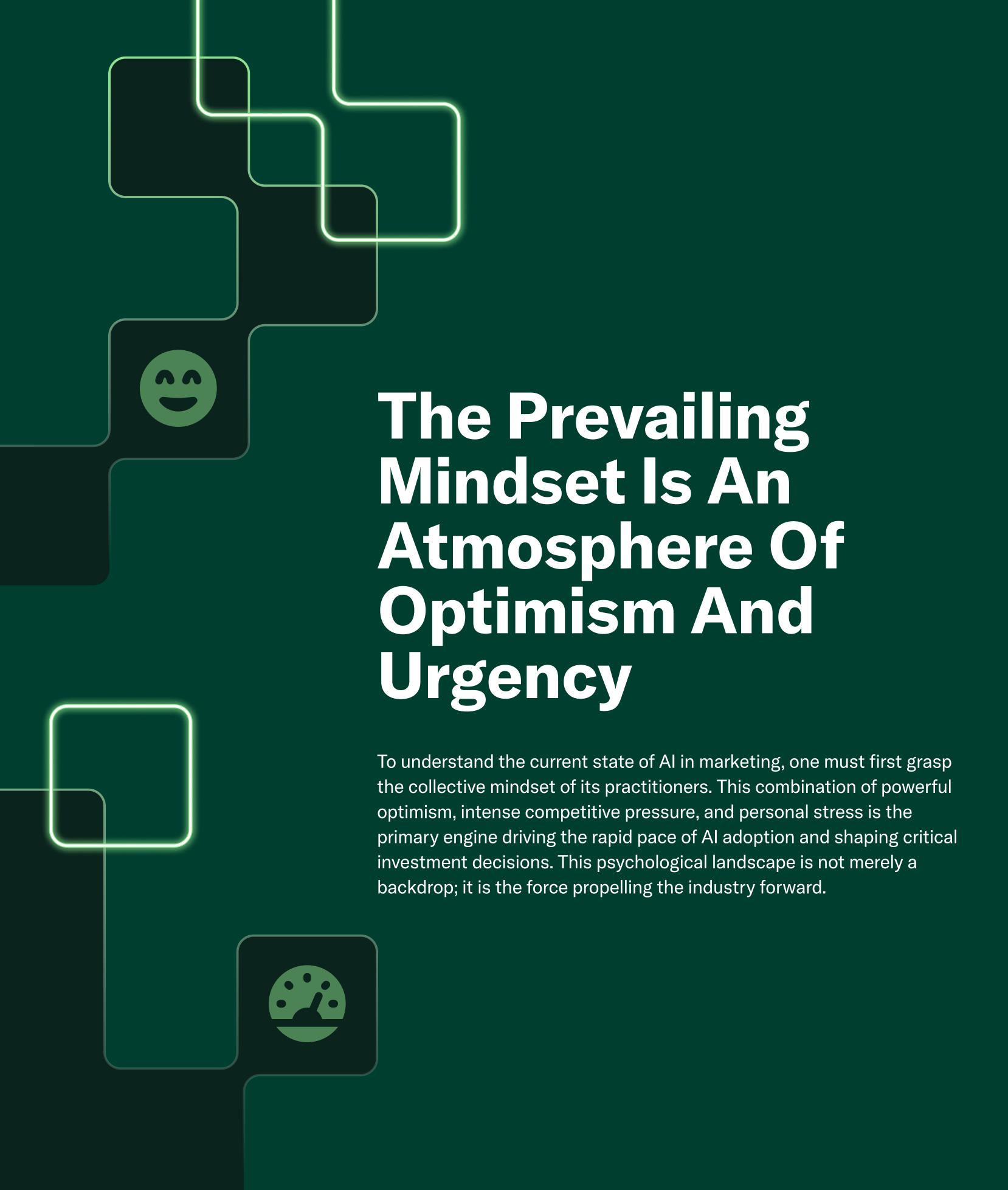
Many also fail to execute on first-party, unstructured data sources and take action on that data in real time, making it difficult for them to meet the demands of the new Al-powered buyer journey. Buying journey optimization is only as strong as the weakest link, and this lack of first-party data execution is creating a critical gap.

At the same time, overconfidence is compounding the risk of overlooking these shortcomings. A statistically improbable majority say they're adopting AI faster than competitors. This is fueling a bias for speed and tolerance for risk, which could be a powerful asset—or cause significant blind spots.

We surveyed 600 U.S. B2C marketing professionals for The Marketing Al Impact Report to provide marketing leadership with a clear view of the industry's trajectory. The report quantifies where ambition, budgets, and capabilities diverge; where operational latency undermines ROI; and where perception breaks from customer reality.

The results of the survey show that strategic decisions made today about AI investment, adoption, and integration will unequivocally define where you stand in the market tomorrow. It's clear that it's time to make bold AI moves, but not without being informed of the hurdles, potential pitfalls, and sentiment on the ground floor.





## Overwhelming Optimism Is The Al Catalyst

Marketers are not just accepting AI; they are embracing it with remarkable enthusiasm, viewing it as a transformative force for both their organizations and their personal careers. This optimism serves as a powerful catalyst for change and investment.

An overwhelming 92% of marketers are "very" or "somewhat" optimistic about how AI is changing the marketing landscape. Marketers also see AI advancing their careers, as 84% believe it is the single biggest growth opportunity in their careers and report that it is already making their work more strategic.







Surprisingly, age makes very little difference in the level of AI optimism. From Gen Z to Boomers, over 90% are optimistic about marketing AI.

#### **Humans Will Stay In The Loop**

While marketers are optimistic about AI, they don't think it will replace them. They firmly believe that humans will stay in the loop. Three-quarters believe that 50% or less of their time will be spent using AI tools to do their jobs, and only 27% think that AI-driven tasks will take up more than 50% of their time.





## The High-Stakes Race For Al Supremacy

Beneath the surface of this optimism lies an intense sense of urgency. The industry perceives the current moment as a make-or-break window for establishing AI leadership. This belief has created a high-stakes environment where inaction is seen as the greatest risk.





The data reveals a widespread conviction: 81% of marketers believe the next 12 months will determine the AI winners in their category, and 80% report that their leadership is pressuring them to demonstrate AI wins quickly.

### The Personal Toll Of The Al Revolution

This industry-wide sprint comes with a significant personal and professional toll. While marketers feel equipped for the challenge, the relentless pace of innovation is a considerable source of pressure.

A significant majority (74%) report that they "often" or "very often" feel stress or urgency about keeping up with Al.

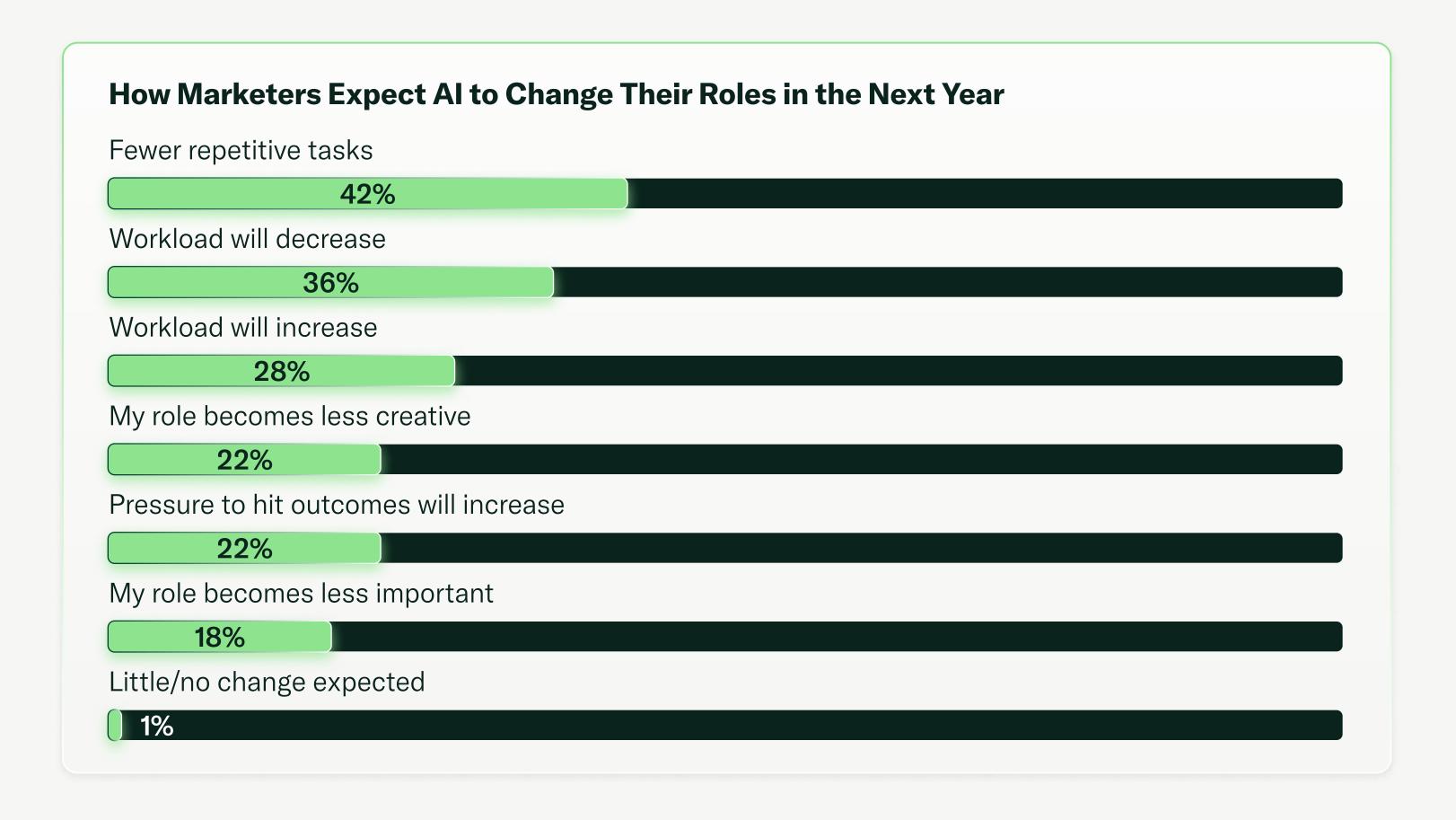


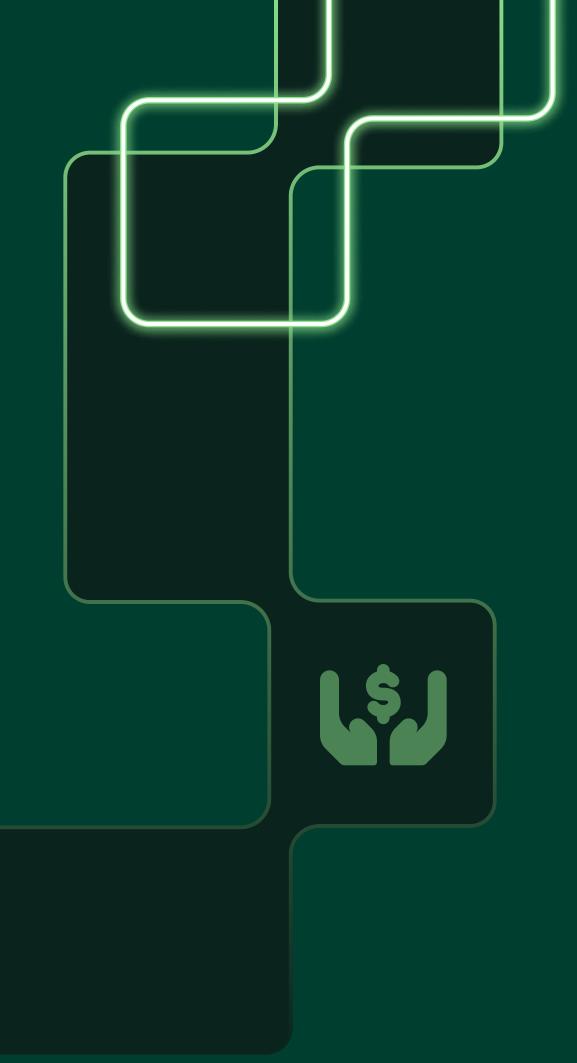


In a testament to their commitment, this stress is contrasted by a high level of personal readiness, with 88% feeling prepared to lead or contribute effectively even if their organization were to double its pace of AI deployment.

## Marketers Still Fear Negative Job Impacts

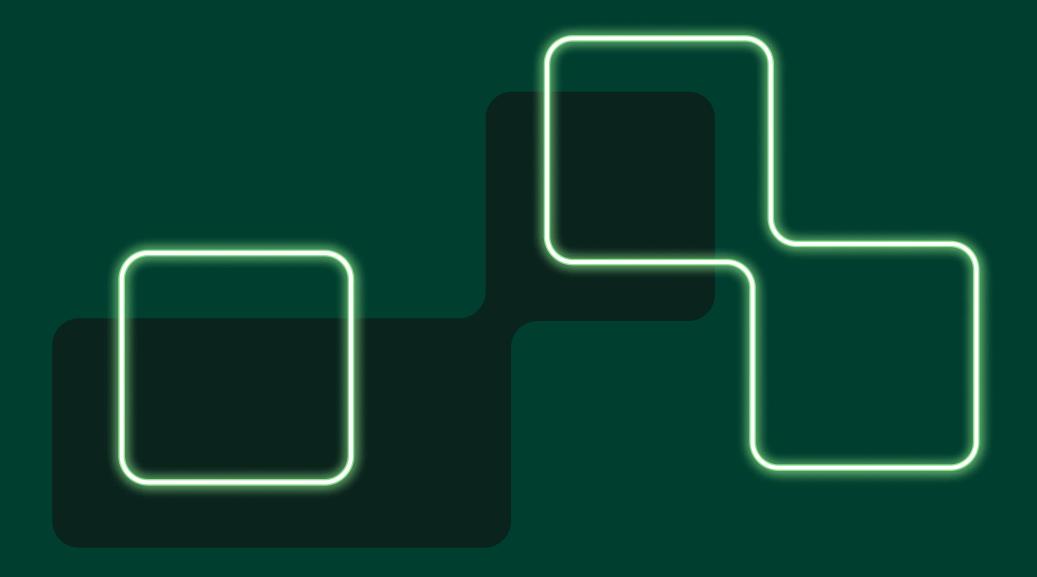
While marketers are very optimistic about AI, they are also wary that AI may negatively impact their roles. About 30% report that AI will increase their workloads, make their roles less creative, and increase pressure to hit their goals. Nearly 30% also think there's a danger that it will make their roles less important.





## How Marketers Are Reconciling Ambition With Budget Allocation

While sentiment is a powerful motivator, an organization's true priorities are ultimately revealed in its budget. The survey data uncovers a series of contradictions between the stated strategic importance of AI and the actual financial resources being allocated, highlighting a critical disconnect between ambition and action.



### **Unwavering Commitment To**Increased Investment

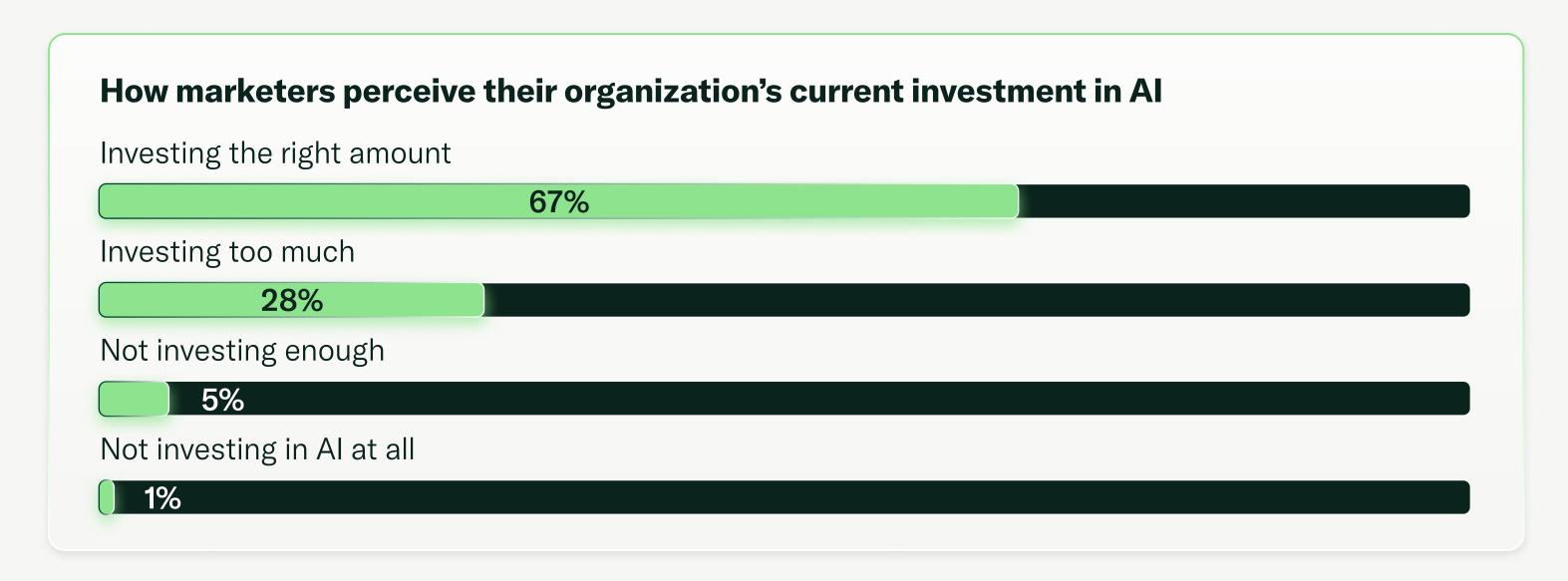
At a high level, the commitment to Al appears absolute. A commanding 90% of B2C marketing organizations plan to increase their investment in Al over the next 12 months. In contrast, a mere 1% plan to decrease spending, signaling near-unanimous agreement on the necessity of continued investment.





## A Contradiction In Perceived Spending

Despite the overwhelming consensus to increase spending, there is a telling disconnect in how marketers perceive current investment levels.



While a majority (67%) believe their company is investing the "right amount," a surprisingly large portion (28%) feel they are investing "too much." Conversely, only 5% feel their organization is not investing enough. This suggests the issue may not be the amount of investment, but a perceived lack of efficiency or a disconnect between central AI spending and the tangible tools available to marketing teams.

### The Budget-Expectation Mismatch

The most significant paradox emerges when comparing strategic expectations to martech budget allocations. An overwhelming 80% of marketers believe that pausing AI initiatives for just 12 months would likely cause them to miss their key 2026 targets.



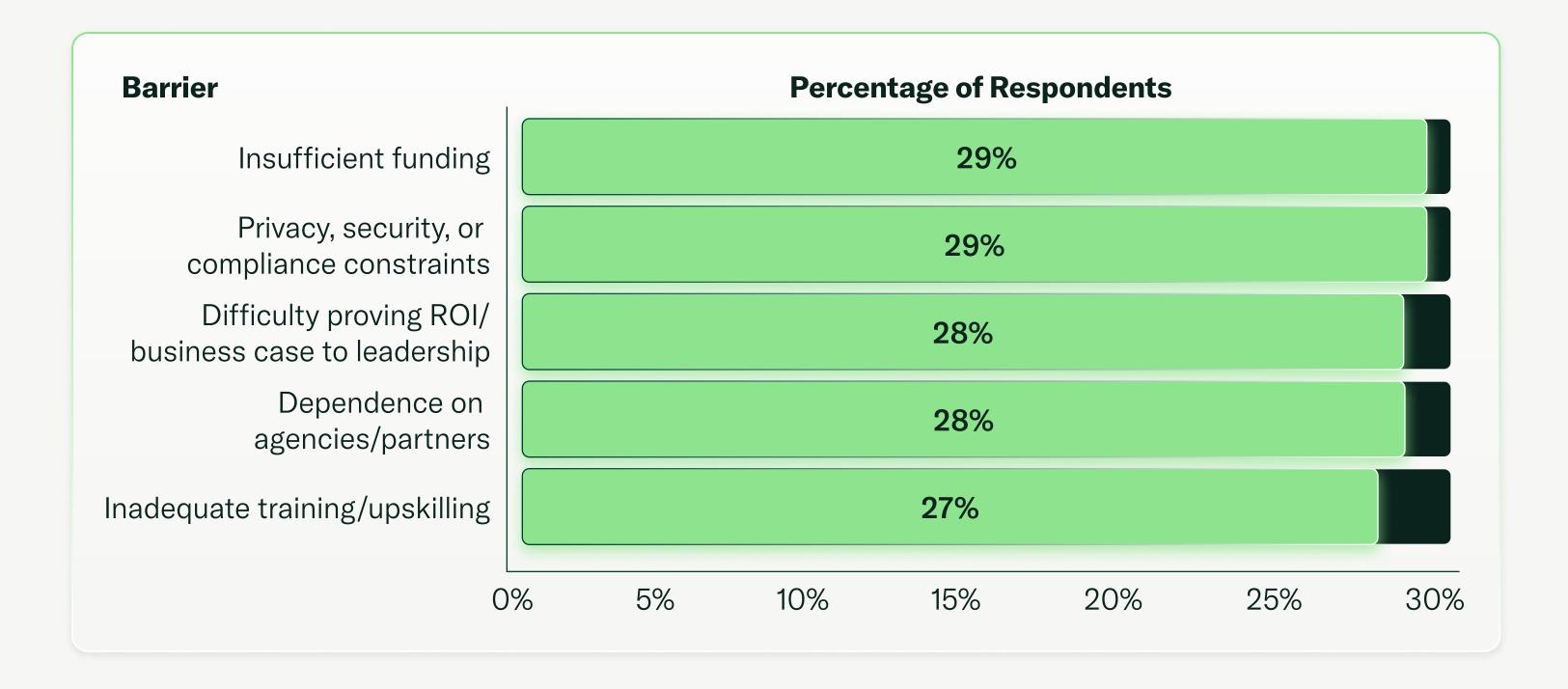




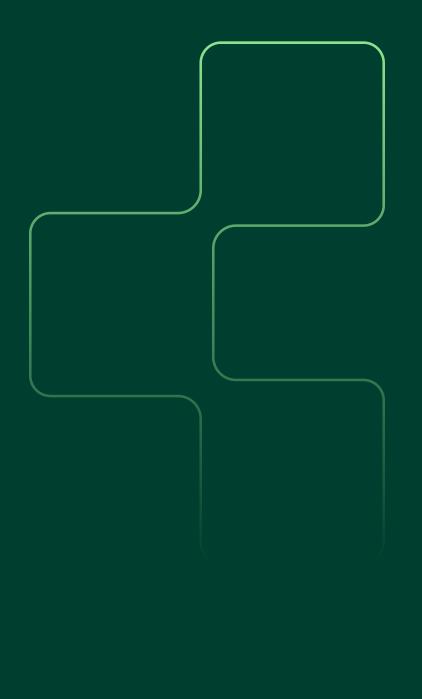
Yet, this "do-or-die" perspective is not reflected in budget planning. A staggering 68% of organizations allocate 20% or less of their Martech budget to Al, and only 12% dedicate more than half of their budget to these critical tools.

#### Identified Barriers To Al Advancement

This mismatch may be explained by the significant hurdles organizations face in scaling their AI efforts. The primary obstacles are not a lack of will but a complex mix of financial, regulatory, and organizational challenges.



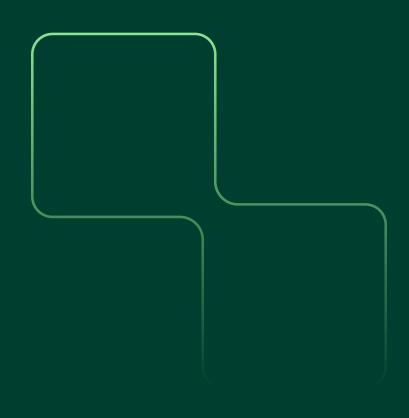
This investment paradox reveals the first critical disconnect: the ambition for AI leadership is not yet matched by the reality of budget allocation.

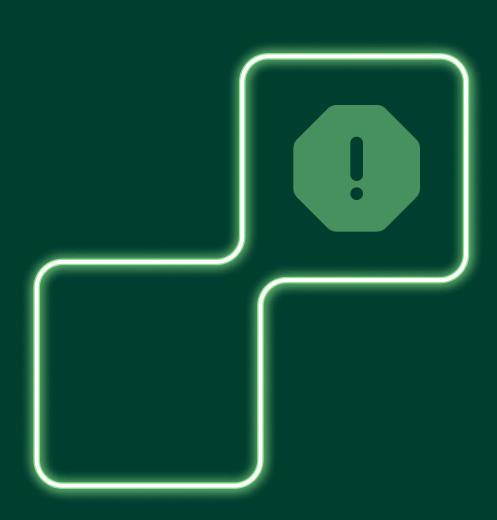




#### The Confidence Conundrum: A Widespread Overestimation Of Al Prowess

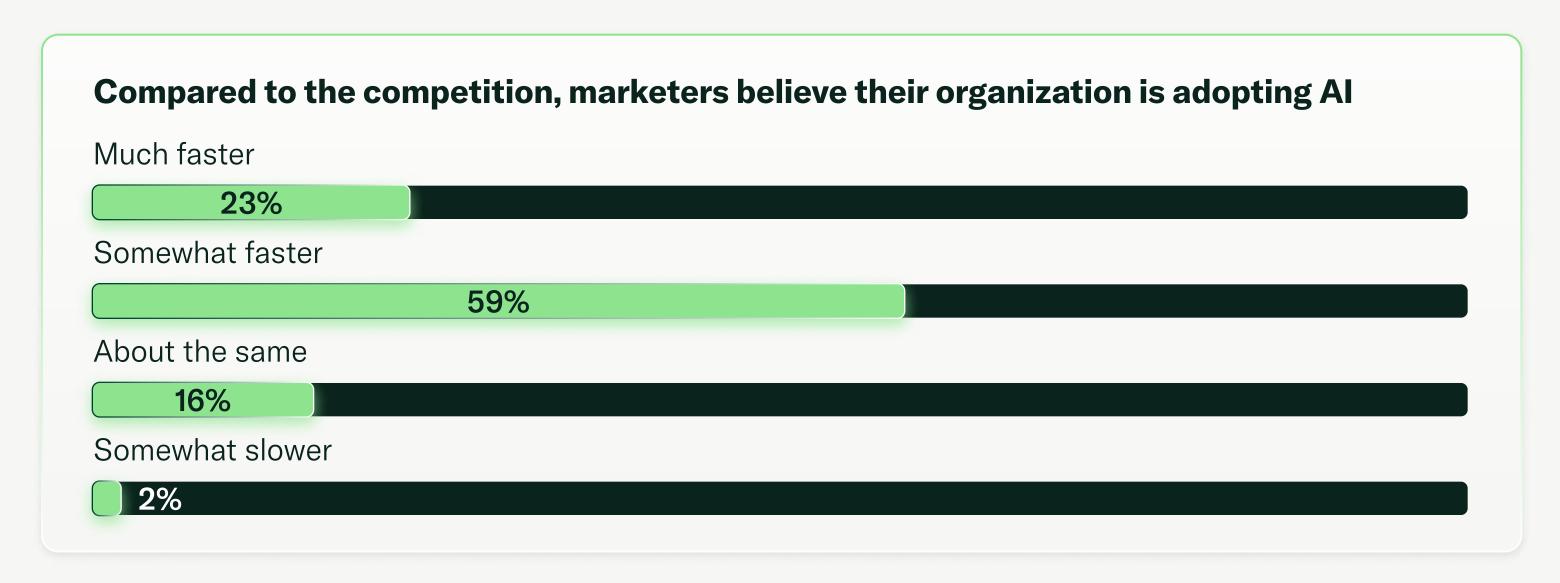
Organizational self-perception can be a powerful asset or a significant strategic blind spot. The survey data reveals a striking level of confidence among marketers—so high, in fact, that it suggests a widespread overestimation of both competitive positioning and internal expertise. This confidence gap could lead organizations to underestimate emerging threats and miscalculate strategic risks.





#### The "Ahead Of The Pack" Illusion

The data points to a systemic overestimation of competitive maturity, a statistical improbability where 82% of respondents believe their organization is adopting AI "much faster" or "somewhat faster" than its closest competitors.



The strategic implication is clear: a vast majority of the market may be operating with an inflated sense of their competitive advantage, potentially leading to complacency and a failure to recognize the true pace of innovation set by rivals.

## A More Sobering View Of Internal Expertise

While confidence in competitive pace is exceptionally high, self-assessments of internal AI expertise are more grounded, though still optimistic. While ratings vary by specific capability, such as personalization or ad optimization, they generally cluster with a minority of firms self-identifying as top-tier.

#### Compared to the competition, my organization's Al capabilities are









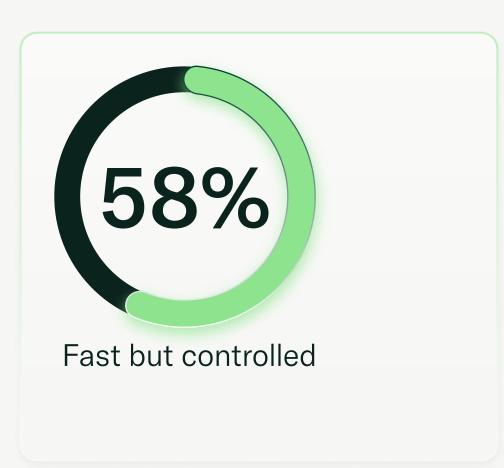
Notably, individual marketers rate their personal expertise at nearly identical levels, indicating a strong alignment between perceived individual and organizational capabilities.

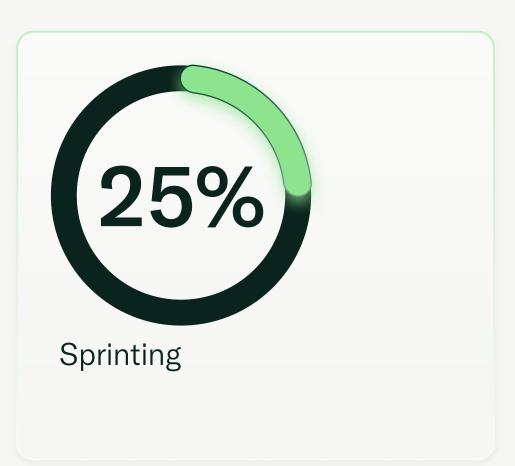
### **Deployment Posture Is Past The Pilot Phase**

This high confidence is reflected in the industry's operational posture. The era of cautious AI experimentation is largely over.

#### Al deployment posture







The data shows that only 15% of organizations are in a "watchful" Al pilot stage. The vast majority are moving decisively, with 58% describing their approach as "fast but controlled" and another 25% "sprinting" to secure a competitive advantage, accepting the risks that come with that velocity.

This confident, aggressive posture directly informs how organizations are approaching the inherent risks of a fast-moving technological revolution.

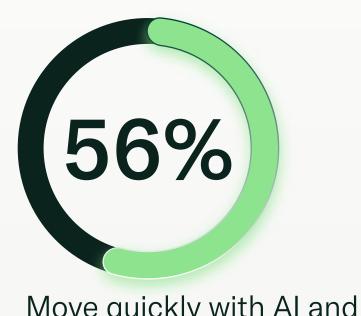


## High-Stakes Strategy: The Industry's Gamble On Speed

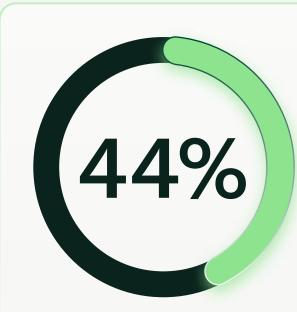
Marketing leaders today face a classic strategic dilemma: move fast to capture a first-mover advantage, or move cautiously to protect brand reputation and customer experience. The survey reveals that in the high-stakes race for Al supremacy, the industry is overwhelmingly prioritizing speed, creating a dynamic where risk tolerance is high and potential consequences are significant. The strategic question is how to gain speed without committing avoidable errors.

#### **Prioritizing Pace Over Perfection**

The most stark finding on risk tolerance comes from a direct choice presented to marketers. When forced to decide between two negative outcomes, a clear majority (56%) stated they would rather accept the risk of harming customer experience and brand trust than be outperformed by competitors (44%). This "win at all costs" attitude underscores the intense pressure to keep pace in the AI race.



Move quickly with AI and risk harming customer experience

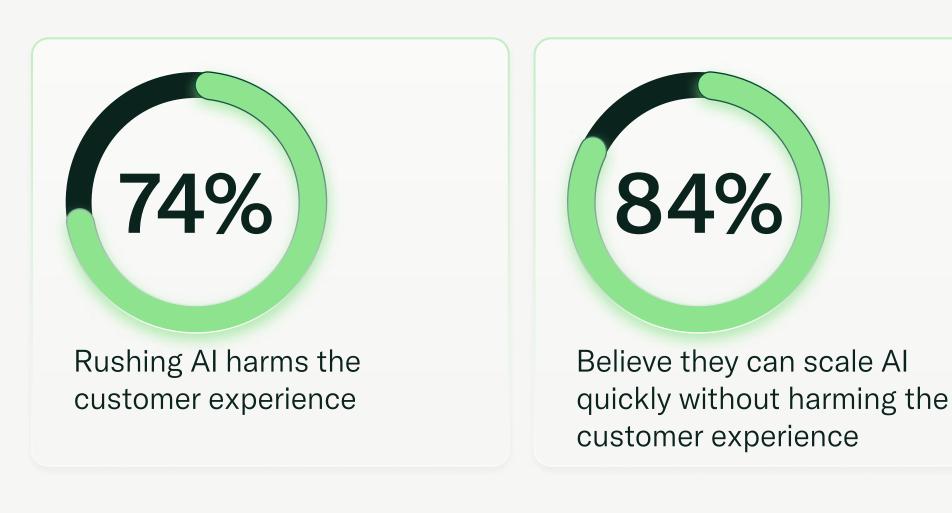


Move more cautiously and be outperformed by competitors

#### **The Risk-Confidence Paradox**

This reveals a cognitive dissonance at the heart of AI strategy: marketers simultaneously acknowledge the risk of rapid deployment while expressing supreme confidence in their ability to avoid it. First, a large majority (74%) agree with the statement, "Rushing AI risks hurting our customer experience." It's worth noting that managers are more concerned with hurting customer experience (80%) than leadership (66%).

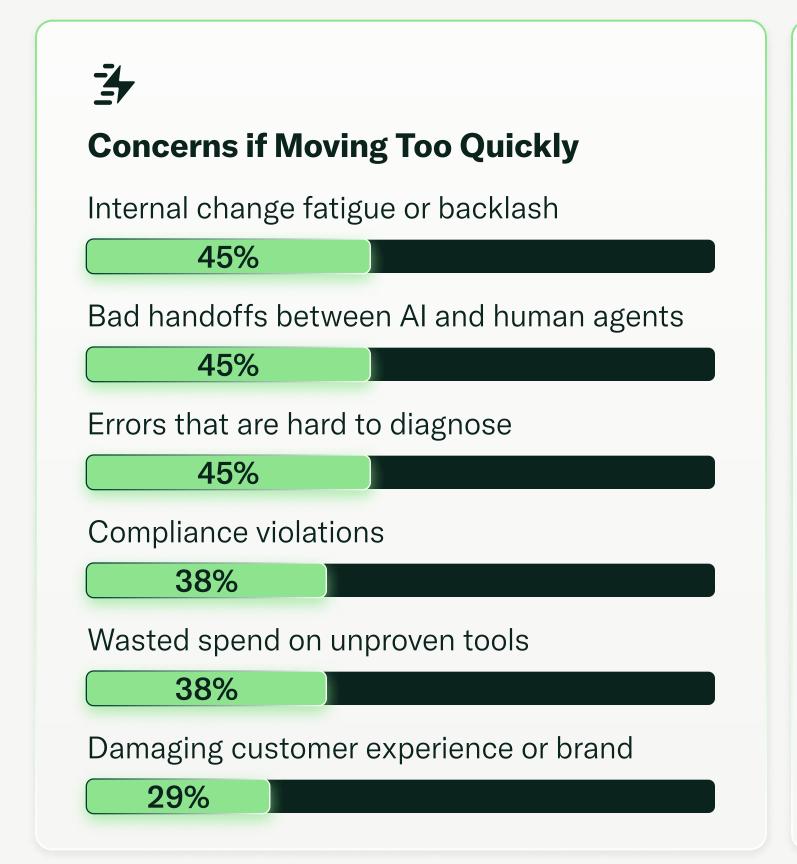
Yet, in a seemingly direct contradiction, an even larger majority (84%) is confident that their organization "can scale AI quickly without harming customer experience or brand." Management and leadership share this same level of confidence.



This belief that "risks apply to others, not to us" is likely a direct consequence of the widespread, statistically improbable belief that 82% of organizations are ahead of their competitors.

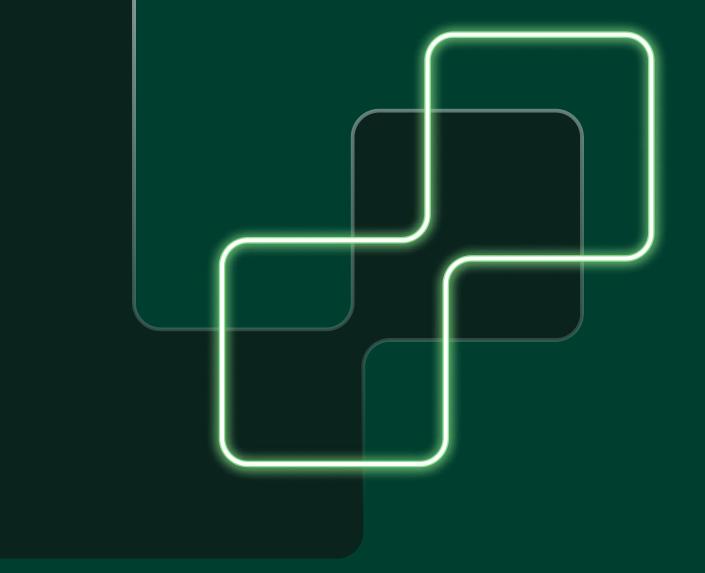
## Dueling Concerns: The Risks Of Moving Too Fast Vs. Too Slow

The specific anxieties diverge based on an organization's perceived Al pace, with slow movers fearing market loss and fast movers fearing internal breakdowns. It is again concerning to see that fear of damaging the customer experience or brand ranks lowest among concerns about moving too quickly.





This strategic balancing act between speed and safety ultimately depends on how effectively AI is being operationalized within the marketing function.

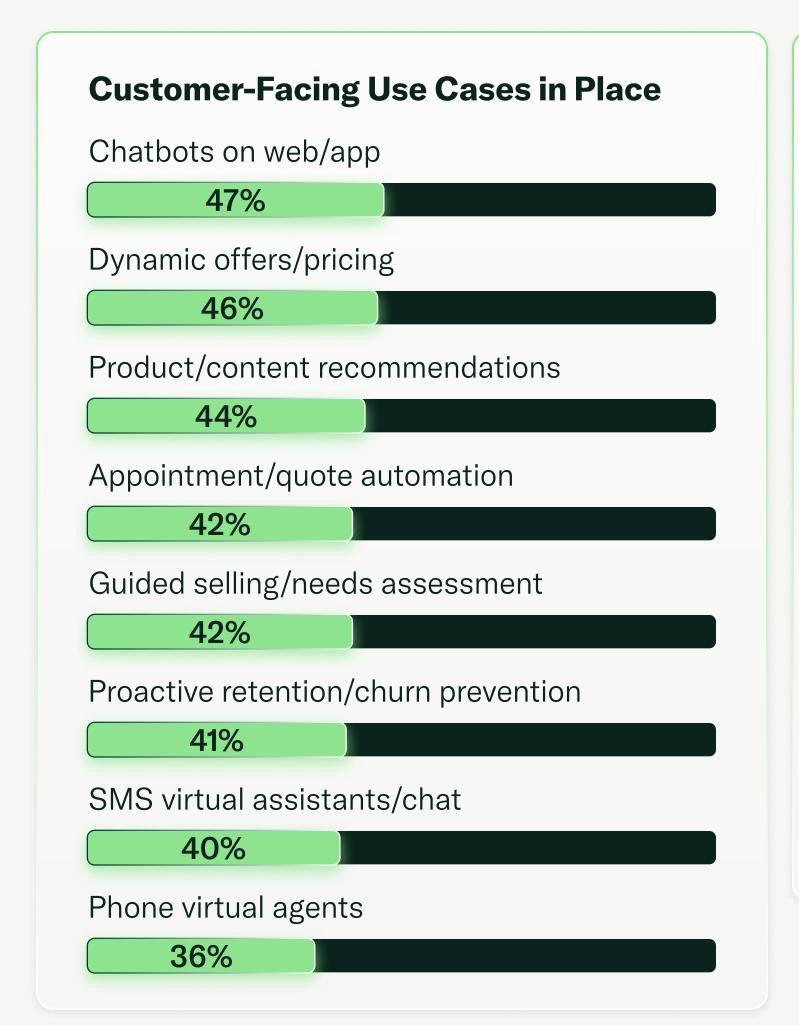


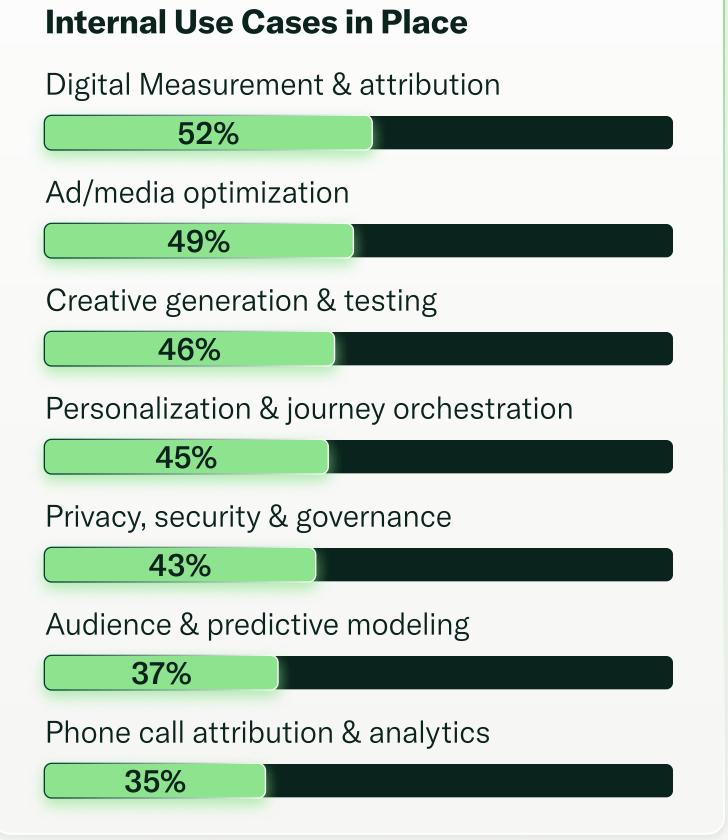
#### Gaps In Application And Insight Activation Are The Operational Reality



## **Current AI Deployment Across**The Buying Journey

All is being applied across a wide range of marketing functions, with a relatively even split between internal process optimization and direct customer-facing interactions.



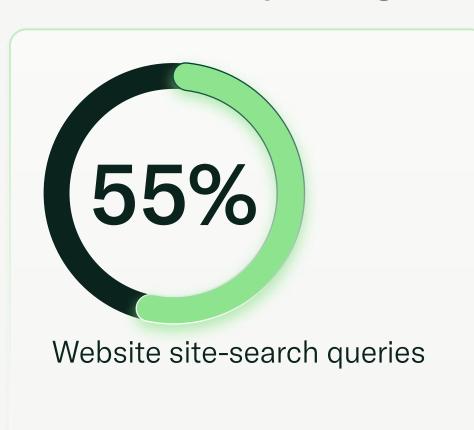


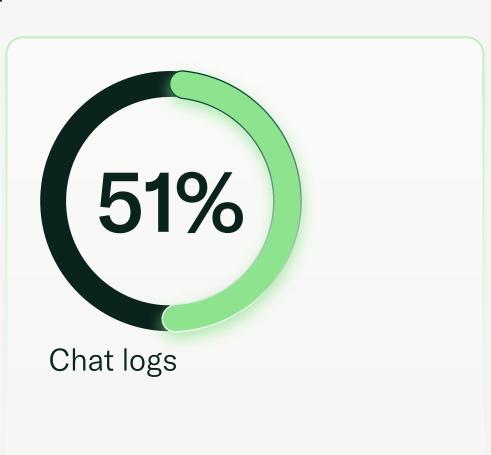
## The Unstructured Data Opportunity Gap

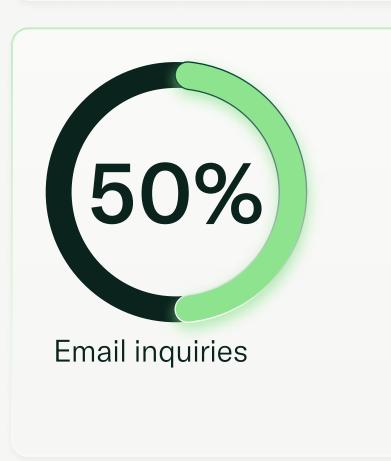
While marketers are actively using AI to mine a variety of data sources, a significant opportunity is being underutilized. Organizations are highly likely to analyze text-based sources like social reviews (58%), but far less likely to mine the rich, high-intent data contained within call recordings and transcripts (37%).

#### Unstructured data sources marketers are actively mining with Al

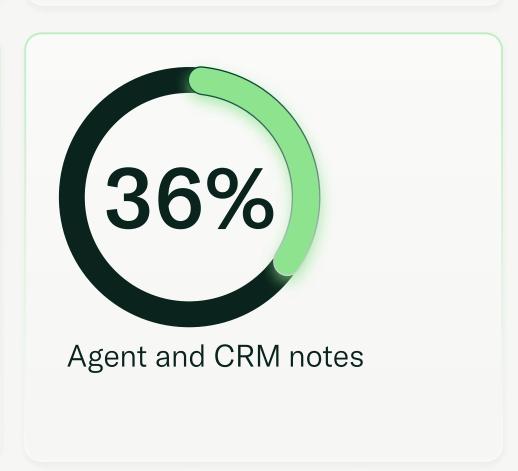












This gap is a strategic vulnerability, as calls contain the unfiltered voice of the customer—their explicit intent, objections, and sentiment—data that is orders of magnitude richer than clicks or form fills. Buying journey optimization is only as strong as the weakest link, and this lack of first-party data creates a critical gap in understanding qualification, objections, conversion drivers, and revenue attribution.

#### **The Critical Latency Problem**

Perhaps the most significant operational failure identified is the "insight-to-action" gap—a major leak in the marketing funnel. The data reveals a costly delay between when an insight is discovered and when it can be acted upon. When optimization signals are delayed, budget is spent on yesterday's picture of demand.

We found that only 21% of organizations can feed call conversion data to ad platforms in near real-time, which is essential for agile optimization. A majority (58%) still rely on slower daily batch uploads.



Can feed call conversion data to ad platforms in near-real time



Rely on daily batch uploads



Can take action on new call data within 1 day

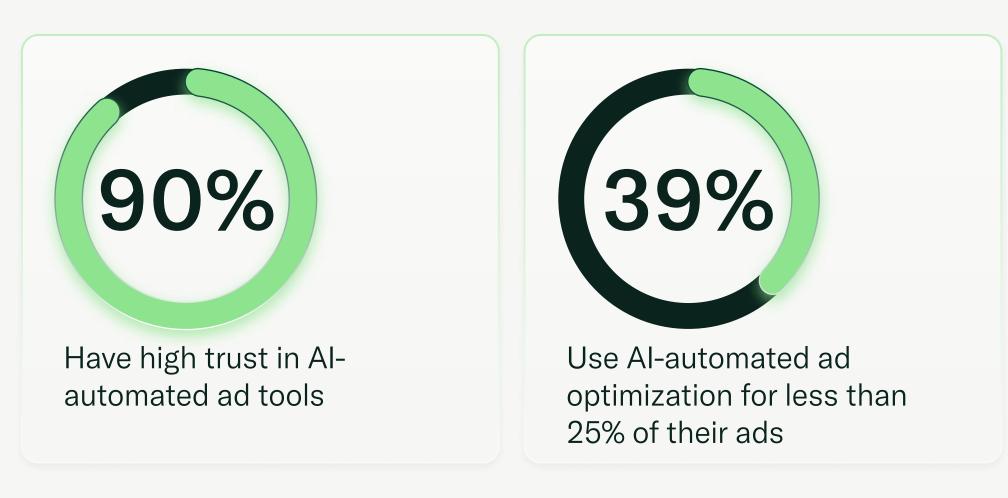


Take 2-7 days to take action on new call data

Critically, the latency is severe for insights from unstructured data. A mere 2% of marketers can turn a new insight from a source like a phone conversation into a live campaign change on the same day. The vast majority—75%—take between two and seven days, a delay that severely blunts the competitive advantage AI is meant to provide.

#### Al Advertising Optimization Confidence Is High, Utilization Is Low

Digital advertising platforms like Google and Meta have powerful Al systems that can automatically manage ad campaigns. While marketers trust this technology, there's a clear gap between their confidence in the tools and how much they're actually using them.



The data reveals a core tension: nearly 90% of marketers have "High" or "Full" trust in Al-automated ad tools like Google Performance Max, Smart Bidding, and Meta Advantage+. Yet most use them to optimize 25% or less of their total ad spend.

This gap suggests marketers are comfortable ceding tactical execution to Al but are reluctant to surrender strategic control.

#### What Marketers Need To Increase Al Ad Automation

Marketers want more oversight—a glass box, not a black box. So, what's holding them back from handing over more control? Marketers say they need more transparency and better guardrails to feel comfortable scaling up.

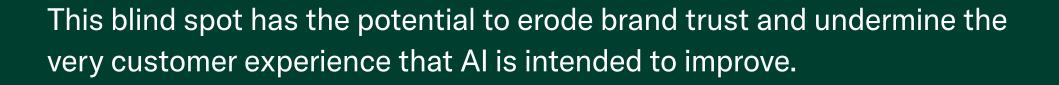
This operational friction leads directly to the final, and most critical, disconnect: the chasm between how marketers believe their AI is performing and how customers are actually experiencing it.

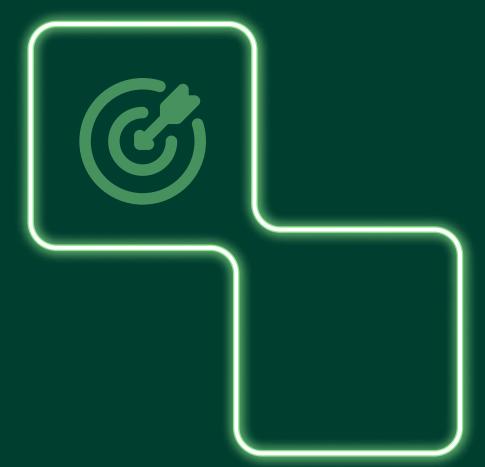




# The Great Disconnect Of Marketer Perception And Consumer Reality

The gap between internal perception and external reality represents one of the single greatest risks in any business strategy, and AI is no exception. The survey data, when contrasted with consumer reporting, quantifies a profound disconnect between how marketers view their AI-driven customer interactions and how consumers actually experience them.





#### Perception Vs. Actual Consumer Sentiment

Marketers are overwhelmingly confident that their Al-powered tools are creating positive experiences for customers. Consumers, however, report a starkly different reality.

#### **Marketers**

85%

believe consumer sentiment toward AI interactions is "very/ somewhat positive"

#### The consumer reality

**Only 37%** 

of consumers felt positively about their interactions with a brand's AI\*

### Misalignment On High-Stakes Interactions

This disconnect extends to how AI should be used for different types of customer needs. Marketers believe consumers are ready to trust AI with significant decisions, but consumer confidence remains low for complex issues.





Nearly half of marketers (49%) believe consumers prefer AI for helping with complex tasks when making high-value purchase decisions. This stands in direct contrast to consumer survey findings, which indicate that only 30% of consumers are confident that AI can successfully resolve a complex issue.

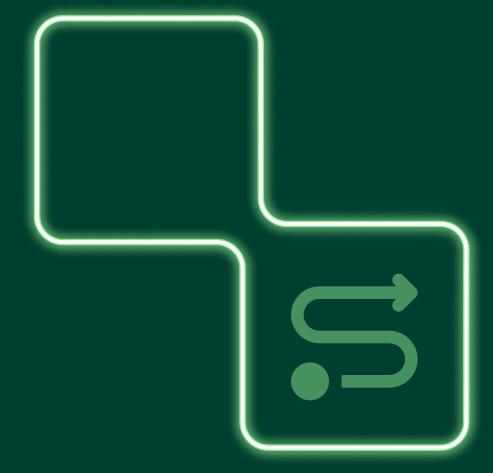
<sup>\*</sup>Source: B2C Buyer Experience Report, Invoca, 2025

## The Bottom-Line Impact On Customer Experience

The ultimate measure of success is whether AI is making the customer's journey better. On this point, the disconnect is most severe. A remarkable 86% of marketers believe AI is improving the customer experience across the buying journey. This optimistic internal assessment is directly contradicted by consumer feedback, where only 35% of consumers report that AI actually made their buying experience better.

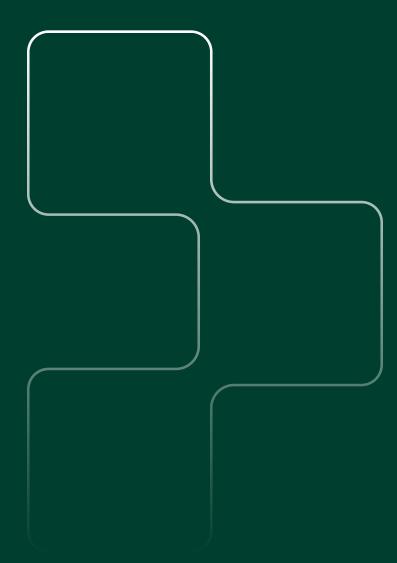


This chasm between belief and reality is not a minor discrepancy; it is a fundamental strategic threat that requires immediate and decisive action from leadership.



#### Strategic Imperatives For Marketing Leadership

The findings of this report reveal a market in a state of productive turmoil. It is an industry fueled by immense optimism and urgency, but simultaneously plagued by strategic blind spots, operational friction, and a dangerous disconnect from its customers. To navigate this landscape successfully, marketing leaders must move beyond ambition and address these challenges directly. The following imperatives provide a clear and actionable framework for closing these critical gaps.



## Mandate An Objective Reality Check On Competitive Standing

The belief held by 82% of marketers that they are outpacing the competition is a statistical fallacy and a significant strategic risk. Leadership must challenge this internal assumption and commission a formal, data-driven competitive intelligence review. Grounding AI strategy in the reality of the market—not in collective optimism—is the first step toward building a sustainable advantage. Failing to do so means navigating the market with a dangerously distorted map.

### **Bridge The Investment- Ambition Gap**

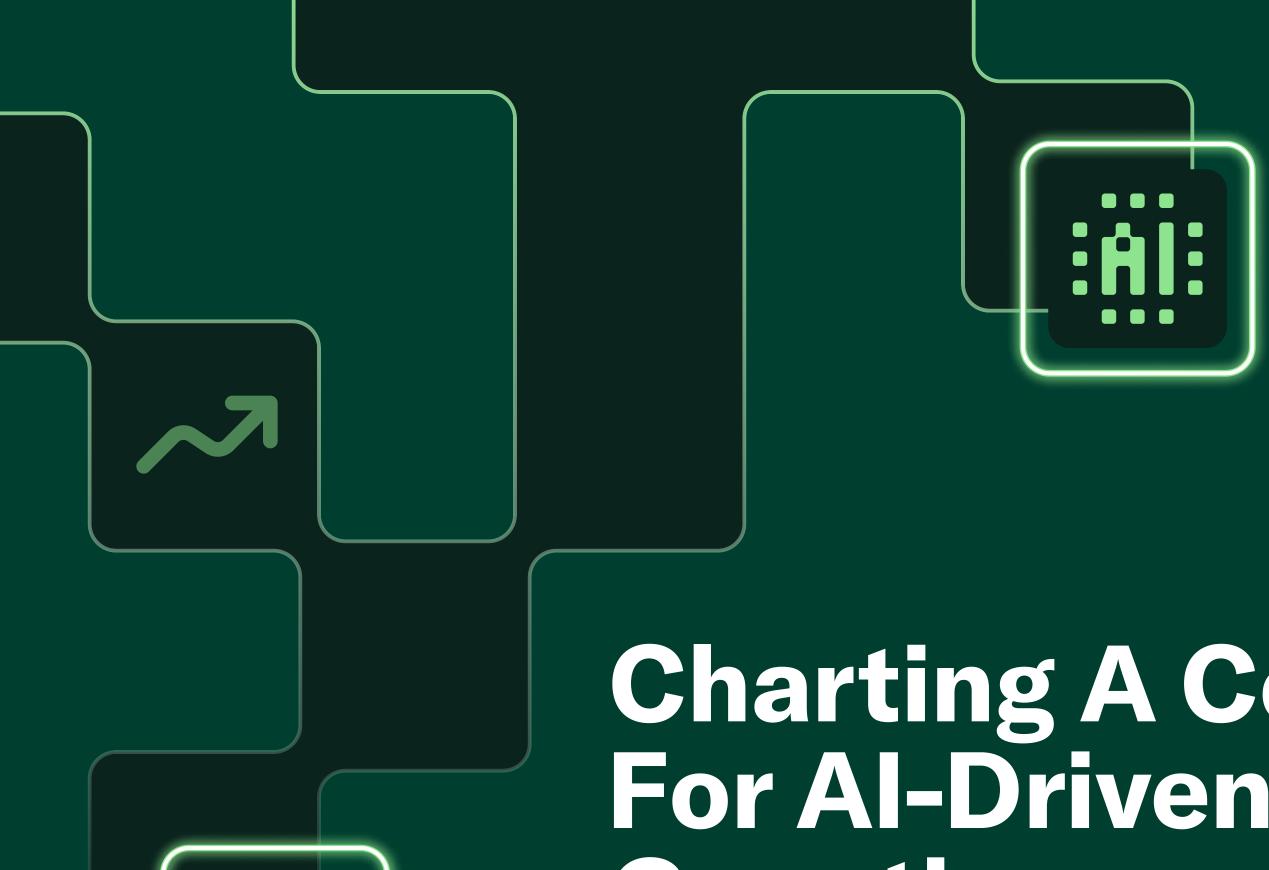
There is a fundamental misalignment between the strategic importance placed on AI and the budgets allocated to it. If 80% of leaders believe AI is essential to hitting 2026 targets, then allocation models where 68% of firms spend less than 20% of their martech budget on AI are unsustainable. Budgets must be critically re-evaluated and realigned to match the strategic imperatives the organization has identified, or ambitions must be scaled back to reflect reality.

#### Prioritize The "Insight-To-Action" Workflow

Insight latency is a primary inhibitor of Al's value. The multi-day delay between data discovery and campaign activation neutralizes the speed advantage Al should provide. Leadership must prioritize investments in the technology and processes required to close this gap. A specific focus should be placed on integrating high-value, first-party unstructured conversational data—currently mined by only 37% of organizations—and enabling near real-time optimization, a capability just 21% possess today. First-party conversation data must be part of the control system for Al. Combine digital interactions, conversation data, and confirmed conversions to ground models in real outcomes, in real time.

## Ground Al Strategy In Validated Customer Feedback

The profound disconnect between marketer perception and consumer reality is the most significant threat to brand trust revealed in this study. Leadership must immediately institute closed-loop mechanisms for validating every Al initiative against actual customer sentiment and preference data. Relying on internal assumptions is no longer acceptable when the stakes are this high. Without this validation loop, the organization is not innovating; it is merely guessing at the customer's expense.



## Charting A Course For Al-Driven Growth

The findings from this research present a clear verdict on the state of the market. The landscape is defined by a potent combination of competitive urgency, widespread overconfidence, and a willingness to move quickly on AI, even if it means sacrificing the buyer experience. This mindset has created a critical disconnect between internal beliefs about Al's success and the market's actual experience—a gap rooted in operational failures to activate the most valuable customer data across the entire buying journey.

The true Al winners will not only be the fastest adopters, but the most astute. They will be the organizations that ground their AI strategy not in ambition alone, but in operational excellence and an unwavering commitment to using data to understand and enhance the actual, not perceived, buyer experience. The capital and brand equity lost by today's overconfident 'sprinters' will become the market share acquired by the more deliberate, customer-obsessed organizations of tomorrow.

#### Report Methodology

600 full-time marketing professionals with manager or higher titles at U.S. B2C companies with 100 or more employees were surveyed. Respondents work in seven industries: automotive, healthcare, home services, telecommunications, travel & hospitality, financial services, and insurance. Results may not total to 100% due to rounding and multiple selection options. The field survey was performed by Sago Online Research.

#### Demographics

