



READOUT

Identity is the new battleground for AI-era marketing

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The excitement around AI in marketing has far outpaced the data needed to make it work.

Just 7% of companies have built the AI-ready data capabilities required to scale advanced AI, according to 2026 Accenture data. Nearly every marketing organization is investing in AI models, but very few have connected the customer data those models depend on. Increasingly, that's the difference between AI that delivers real business results and AI that looks impressive in a demo.

The problem is only getting bigger. Customer signals now come from every direction, including websites, apps, connected TV (CTV), retail media, email, stores, and AI-powered experiences. Those signals are multiplying faster than brands can unify them and agentic AI is raising the stakes even more by making decisions based on whatever data it's given. LiveRamp CEO Scott Howe calls it a “war for signals,” a race to capture, connect, and activate customer data quickly enough to make every marketing dollar count. In that race, identity has become the foundation that ties everything together.

“Advertisers need to understand where their customers are consuming content so they can buy inventory to reach the right target audience and measure that inventory,” said Larry Allen, vice president, global strategy, addressable, data, and measurement partnerships at FreeWheel, a Comcast Company. “Identity is at the core of it all. Working with LiveRamp, we can extend [identity resolution] for our clients so they have confidence in who they're planning against, where they're activating, and then measure accordingly.”

This report explores why brands with more customer data than ever still struggle to recognize the same person across channels, why yesterday's patchwork identity solutions aren't built for AI-driven marketing, and what the evidence says connected data is actually worth. It concludes with a practical playbook for becoming AI-ready, covering the identity strategy, data collaboration, and implementation steps needed to turn fragmented signals into a competitive advantage.

Why more data hasn't created a better customer view

Brands have never had more customer data, yet many still struggle to recognize the same person across channels. Only 45% of consumers say brands understand them, while 83% of business leaders believe they do, according to Twilio data from 2025. That 38-point gap suggests many organizations are making decisions based on a customer view that feels complete internally but falls short in practice.

Customer behavior has become increasingly difficult to stitch together. Some 88% of US consumers switch between digital activities within an hour, keeping an average of 3.6 tabs open while researching products, according to MiQ's 2026 "From Funnel to Flexibility" report. Many describe their own purchase journeys as unpredictable. Every search, click, stream, store visit, and app session creates another signal, often on a different platform and under a different identifier. Those signals only become useful when they can be connected to the same customer.

Most marketing organizations are still working toward that goal. Just 46% of North American marketing and data professionals trust a single system as the source of truth for the customer data they use

Marketing and Data Professionals in North America Who Have One System They Trust as the Source of Truth for Customer Data to Use in Marketing Campaigns

% of respondents, Feb 2026

Yes



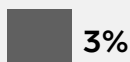
Partially



No



Unsure



Note: numbers may not add up to 100% due to rounding.
Source: GrowthLoop, "The 2026 AI and Marketing Performance Index" in partnership with Ascend2, May 12, 2026

in campaigns, according to 2026 data from GrowthLoop and Ascend2. This means more than half are making personalization and media decisions without complete confidence in the underlying customer data.

The business impact extends well beyond analytics. Over two-thirds (69%) of US consumers have abandoned a purchase because they were concerned about how a company handled their data, found 2025 data from Liquid Web. At the same time, expectations around privacy continue to rise. Deloitte found that only 48% of consumers believed the benefits of online services outweighed privacy concerns in Q2 2025, the lowest level since 2019, while overall concern about data privacy jumped from 60% to 70% in a single year. Brands are expected to deliver more personalized experiences while giving consumers greater confidence that their data is being handled responsibly.

For marketers making 2027 investment decisions, customer data unification has become foundational. AI can only act on the information it receives, and disconnected customer data limits every downstream use case, from targeting and measurement to personalization and agentic AI. Until brands can build a consistent view of the customer, adding more signals or more AI tools will do little to improve the customer experience.

The identity layer is still a patchwork

Marketers have spent the past few years responding to the signal challenge, but largely by adding new tools rather than building a connected foundation. Some 91% of advertisers, publishers, and ad tech platforms already use or are testing alternative identity solutions, and 90% say they're satisfied with their approach, per a 2025 ID5 survey cited in EMARKETER's Digital Privacy Trends 2026 report.

On the surface, those numbers suggest the industry is well prepared for the future, but the underlying infrastructure tells a different story. The Trade Desk reports that nearly 80% of bid requests now contain at least two identifiers, according to the same EMARKETER report. Instead of relying on a single identifier, marketers are managing a growing web of overlapping IDs that still don't resolve to a consistent view of the customer.

That fragmentation becomes much more consequential as AI takes on larger marketing responsibilities. Three-quarters of marketing organizations are already using AI in some capacity, but only 13% have adopted agentic AI,



91.0%

**of advertisers,
publishers, and
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identity solutions**

Source: ID5

found Salesforce's 2026 State of Marketing report. Disconnected data is one of the biggest barriers: The average marketing organization manages seven different data sources, yet only 26% of marketers say they're completely satisfied with how well those sources connect, per Salesforce. When customer data is fragmented, more advanced AI use cases remain out of reach.

Marketing budgets reflect a growing recognition that the missing piece is infrastructure. Winterberry Group expects US marketing data spending to reach \$33 billion in 2026, an 8.7% increase driven largely by investments in the data foundations needed to support agentic AI. The investment priorities tell the same story: 52% of US B2B marketers plan to invest in data unification, per 2025 data from Demandbase and The Harris Poll, while 2024 Econsultancy data found that 62% of brand marketers expect first-party data to become even more important over the next two years.

The question for marketing leaders is whether their identity stack is built for what comes next. A patchwork of identity solutions may be enough to support today's campaigns, but agentic AI requires something different: a durable customer foundation that can connect data across systems and give AI a consistent view of the customer.

Connected data turns AI into results

Where customer data is connected, the AI payoff stops being theoretical. Marketing teams with unified customer data are 42% more likely to respond to customers regularly and 60% more likely to use AI agents to scale engagement than teams working from fragmented data, according to Salesforce. Unified customer data appears to be separating organizations experimenting with AI from those putting it to work.

The same pattern shows up in personalization. Consumers are far more likely to buy when engagement is personalized in real time, yet only 44% of brands say they can deliver that experience, according to Twilio's 2025 State of Customer Engagement Report. Real-time personalization depends on being able to recognize the same customer across channels. Without that foundation, AI has little context to personalize against.

US marketing data spending is expected to reach \$33 billion in 2026.

Source: Winterberry Group

“When we think about that deep personalization, historically that’s relied on cookies,” said Paul Bloom, director of product management at Indeed. “LiveRamp’s RampID is the underpinning of our entire digital ads ecosystem that allows us to know who somebody is, whether they’re on Indeed or off of Indeed, and we would lose all visibility into that as third-party cookies are going away.”

Marketers increasingly see connected customer data as the foundation for future growth. Personalization at scale tops the list of planned data-activation investments at 38%, ahead of real-time campaign optimization (35%) and audience segmentation (32%), according to 2025 data from Supermetrics.

Consumer behavior is making that foundation even more valuable. Over half (53%) of consumers have opted out of data collection on AI platforms, while 31% have intentionally provided false information such as a fake name or

Planned Data Activation Use Case Investments in 2026 Among Marketers Worldwide

% of respondents Dec 2025

Personalization at scale



Real-time campaign optimization



Audience segmentation and targeting



Predictive modeling and lookalike audiences



Cross-channel attribution



Customer journey mapping



First-party data for paid advertising



Budget pacing and spend optimization



Source: Supermetrics, “Supermetrics 2026 Marketing Data Report,” Feb 24, 2026

birthday, found Cloaked's "How Americans Feel About Sharing Their Data With AI" report. That shifts the advantage toward brands with strong first-party relationships and consented identity.

The technology is already moving in this direction. Iterable's Nova Agent, for example, analyzes behavioral, product, and engagement data that traditionally lived in separate systems, then uses those insights to build and optimize campaigns, including through Google Ads. Iterable CMO Priya Gill says success now "starts with a shift to real-time decisioning." The pressure to get there is growing: Salesforce found that 78% of marketers still cannot produce personalized content at scale. Although the tools are becoming more capable, many organizations still lack the connected customer data needed to get the most out of them.

Building the foundation for agentic AI

One area of the identity ecosystem has advanced quickly: responsible data collaboration. According to February 2024 IAB and BWG Strategy data, 66% of US data and advertising professionals have adopted data clean rooms in response to privacy regulations and signal loss. In addition, the market has coalesced around a handful of durable, people-based identifiers: The Trade Desk's UID2, built on encrypted email; ID5's ID, which combines hashed emails, page URLs, and IP addresses; LiveRamp's RampID, which accurately links and translates any authenticated identifier or combination of identifiers while respecting each party's privacy rules and preferences; and Lotame's Panorama ID, which links consumer behavior across web, mobile, and CTV. Scale is becoming less of a concern, too. LiveRamp says its collaboration network reaches destinations that comprise 92% of consumers' engaged digital time, while RampID sets a high industry benchmark with a 99.5% match rate and 97.8% consistency score.

"We can transact on RampID without sharing Snap customer data, without needing to receive advertiser data, and we can do that to further both measurement and targeting objectives," said Christopher Cox, Snap Inc.'s former head of partnerships, revenue product.

Over half (57%) of ad buyers have used or plan to use AI agents for programmatic deal execution, per the IAB, requiring industry standards to evolve alongside agentic technology. LiveRamp contributed its Agentic Audiences protocol for responsible audience matching to the IAB Tech Lab, which later launched the Agentic Real-Time Framework.



57.0%
**of ad buyers
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Source: IAB

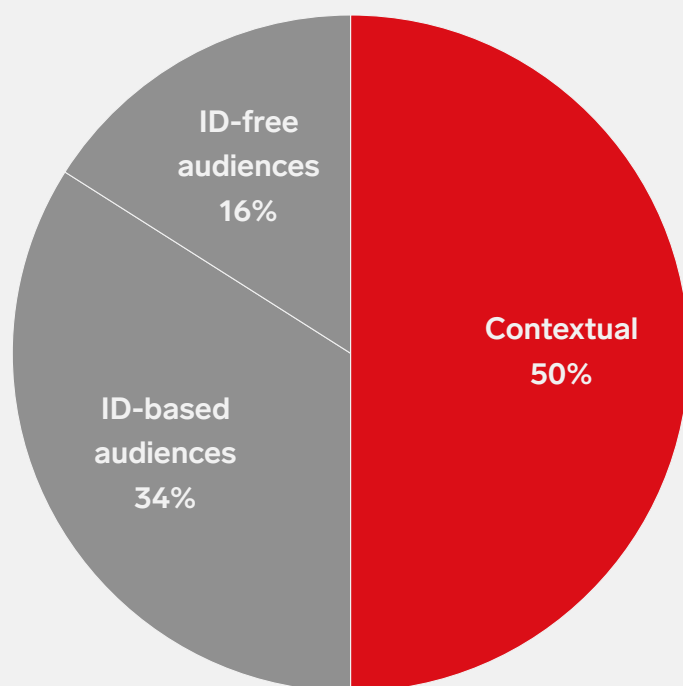
Brands are beginning to demonstrate what that infrastructure can enable. Albertsons Media Collective and NBCUniversal, for example, use the LiveRamp Clean Room to connect premium CTV ad exposure with in-store sales. Chobani's pilot campaign generated a 1.9x lift in new-to-brand social engagement and a \$4.22 return on ad spend. This shows "just how powerful a connected, full-funnel approach can be," Christen Spencer, Chobani's director of shopper marketing, told Marketing Dive.

Contextual targeting fills important gaps where durable identity isn't available. According to Comscore, nearly three-quarters of ad industry decision-makers plan to maintain or increase their investment in contextual targeting, and half of respondents in privacy-regulated industries consider it their primary targeting strategy.

Privacy-Regulated Industries Rely Heavily on Contextual for Targeting

% of US advertising decision-makers in privacy regulated verticals, Nov 2025

Q: What is your main targeting tactic?



Source: Proxicim and Comscore, "State of Programmatic 2026," Jan 20, 2026

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Identity is the key to AI-enabled marketing

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This might be the understatement of the century: AI multiplies surfaces and touchpoints. Consumers are using AI in new ways, including new apps and through different websites.

In addition to serving ads on these surfaces, AI also offers magnitudes more personalization through existing touchpoints, through always-on capabilities and things like dynamic creative. With these changes, any misses are multiplied by the scale and the speed of AI—as well as through reinforcement—meaning errors can get progressively worse over time. Knowing your customer, and understanding their journey, is critical to not only avoiding miscues, but also to opening up cutting-edge marketing capabilities, including AI.

By now, marketers are aware of identity solutions. What's changed is that the pace of AI will eventually outrun late adopters' abilities to catch up. If marketers have not yet implemented an identity solution, that leaves multiple steps that must be solved before they can enable AI. Worse yet, the fragmentation caused by an ineffective identity approach is scaled by AI, amplifying weak inputs and creating blind spots across reach and performance.

Every AI model, recommendation, and personalization runs on data, and identity is critical for giving marketers the ability to accurately connect this data across the ecosystem. Without identity bringing fragmentation into a coherent whole,

AI can't deliver on its promise. Authenticated, deterministic identity provides an accurate, unified view of consumers on their journeys, offering the strongest possible basis for marketing.

Identity is more than just helping marketers understand their customers. It provides a shared basis for truth that the rest of the ecosystem can work from. And since no company has every signal it needs on its own, collaborating with that data is essential to enrich customer understanding and improve marketing performance.

Beyond surfaces and touchpoints, as AI becomes even more present in everyday life, agents will be another form of AI that marketers leverage. Marketers are increasingly tapping agentic AI to independently run parts of their campaigns, and autonomously measure, learn, and improve to maximize performance. Just as with other forms of AI, the key for maximizing agents' performance will come from unlocking data—and the insights data yields—through collaboration powered by identity.

Looking towards the AI-enabled future, data collaboration will help marketers mitigate any risks of fragmentation, in addition to uncovering unprecedented insights and performance, and identity is the key to unlocking all of this. As the marketing landscape continues to shift, marketers must ensure their identity foundation is optimized to support the sustained growth, innovation, and performance that AI requires.

The strongest identity foundation starts with the strongest match rate. See how [LiveRamp achieves 99.5% match rate accuracy](#).



/LiveRamp

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LiveRamp securely connects your data with your partners, so you can deliver experiences customers want, maximize marketing returns, and drive more revenue to the bottom line. Replace dashboard-hopping with AI-powered workflows your legal team trusts, so you can test more, move faster, and scale what works.



See what AI-powered marketing looks like on better data

For marketers planning the next phase of AI adoption, a few priorities stand out:

1 Audit the identity stack for durability, interoperability, and security.

Nearly every marketer has adopted alternative IDs, yet most bid requests still contain multiple identifiers. The question is whether those identifiers resolve to a single, accurate customer view across channels.

2 Turn anonymous users into authenticated customers before investing in more reach.

As consumers opt out of data collection and increasingly provide false information to AI platforms, consented first-party relationships become more valuable over time.

3 Treat identifier interoperability as a business decision.

When authenticated or alternative IDs are available on open web inventory, publisher revenue increases by roughly 16%, according to a 2024 Trade Desk analysis of PubMatic impression data.

4 Start with one clean-room collaboration tied to a measurable business outcome.

The Albertsons, NBCUniversal, and Chobani partnership shows how connecting media exposure with sales can produce measurable results.

5 Build the data foundation before scaling AI agents.

Companies with AI-ready data report a 4.5 percentage point EBIT margin advantage, according to Accenture, making the business case for investing in data readiness before expanding AI initiatives.

AI is reshaping marketing, but its success still depends on the quality of the customer data behind it. Brands that have invested in connecting that data will be better positioned to put AI to work than those still operating from fragmented customer views.

About this report

Research for this report was compiled by members of the EMARKETER Studio team, using reports, forecasts, and research by EMARKETER.

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