

INDUSTRY REPORT

2026 Marketing Decision Confidence Index

How 500 paid marketing and finance professionals make measurement, AI, and budget decisions.

Table of contents

- Executive summary 3
- About the survey and participants 4
- Key takeaways 5

- SECTION 1
- Confidence in current marketing measurement approaches 6

- SECTION 2
- Marketing measurement and decision-making 11

- SECTION 3
- AI in marketing 18

- SECTION 4
- Marketing channels and investments 22

- What's your next move? 31

Executive summary

When we set out to conduct the 2026 Decision Confidence Index, we wanted to understand something that last year's Haus industry survey hinted at but didn't fully surface: It's not enough to have measurement tools. The question is whether leaders trust them to guide decisions — and whether that trust holds up when stakes are highest.

In January 2026, we surveyed 500 senior marketing, finance, and executive decision-makers across the United States. Every respondent carries responsibility over paid marketing budgets greater than \$11M annually. Forty-three percent are C-level executives. Twenty-nine percent are VP or Director level.

What we found was a clear gap between stated confidence and real-world decision-making. Leaders broadly believe marketing drives growth. But when asked to connect marketing investment to revenue, defend a large-scale brand investment, or explain their measurement approach in a boardroom, that confidence erodes — quickly.

Nearly 4 in 5 suspect budget waste they cannot confirm. Nearly 3 in 4 have killed or scaled back a marketing idea because they didn't trust their ability to measure or defend it.

Only half of all respondents say they are measuring marketing activity that drives growth and business outcomes.

So what are companies measuring? They're measuring what's easily accessible — but it's not translating into better decisions.

The Haus Decision Confidence Index explores four interconnected themes:

- Confidence in current marketing measurement approaches
- The role of AI in marketing measurement execution and accountability
- The ways marketing measurement gaps are shaping strategic business decisions
- Where marketing investment is headed in 2026

Organizations that clearly connect paid media to incremental business outcomes make faster, more decisive, and more defensible decisions. Over time, these decisions compound into durable growth advantages.

This report is designed to help you understand where the gaps are, why they persist, and how closing them can support better business outcomes.

About the survey and participants

Collection period

Responses were collected in **January 2026** using an email invitation and an online survey.

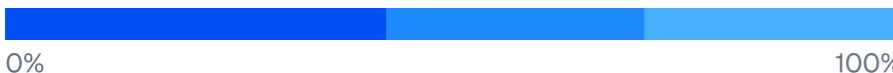
Accuracy of results

Results are accurate to **±4.4% at 95% confidence limits** assuming a result of 50%.

Country of residence

500 U.S.-based marketing, finance and executive decision makers

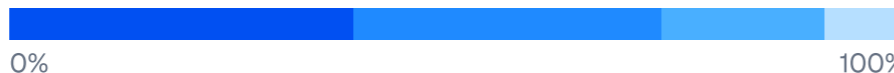
Job role



- Owner / C-level Executive 43%
- VP / Director 29%
- Senior Manager 29%

100% are senior management level and above who have responsibility over paid marketing at their organizations.

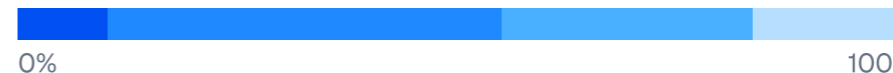
Annual paid media budget



- \$11-22MM 38%
- \$21-50MM 34%
- \$51-100MM 18%
- \$100MM+ 9%

27% are responsible for annual paid media budgets over \$51MM.

Business size



- Less than 250 10%
- 250-999 44%
- 1,000-4,999 28%
- 5,000+ 18%

46% work for companies with 1000+ employees.

Top business sectors

Fintech / Financial services	10%
CPG / Retail	9%
DTC / Ecommerce	9%
Media / Entertainment	9%
Technology / Software / SaaS	8%
Marketplaces	8%
Edtech / Education	9%

Key takeaways

- 01** **Only half (49%) say their marketing measurement programs are built to measure impact on business outcomes.** The other half (51%) simply measure what's easy, accessible, and/or expected from leadership.
- 02** 78% say they are being pressured to integrate AI marketing tools, but **only 51% feel confident explaining AI-driven ROI to the board.** 71% believe AI prioritizes short-term performance over long-term brand growth.
- 03** **Only 40% say their measurement tools make it much easier to take decisive action.** Given how much organizations spend on infrastructure, martech stacks, and AI, the fact that only 2 in 5 leaders feel confident acting decisively based on these tools is telling.
- 04** **Incrementality testing tops the list of most-trusted marketing measurement solutions (60%).** Media mix modeling (MMM) is the second most-trusted solution (40%).
- 05** **35% say more than 20% of their marketing budget is inefficiently allocated.** Most believe between 11-30% is likely wasted.
- 06** **74% have killed a marketing idea due to measurement uncertainty.** Good ideas are dying on the table because of the inability to tie marketing investments to business outcomes.

Confidence in current marketing measurement approaches

Most senior leaders say they're confident in their measurement approach. But dig a little deeper, and that confidence has limits.

Ninety percent believe marketing drives growth. But **only about half (49%) say they measure what actually drives business outcomes, and only 39% feel “very confident” evaluating ROI for a large-scale brand investment** – exactly the scenario where getting it right matters most.

The gap between reported confidence and actual certainty shows up most clearly in one number: **35% of leaders say more than 20% of their marketing budget is inefficiently allocated — but can't confirm it because of ineffective measurement systems.**

That's not a tool problem. When a third of leaders cite reliability concerns and conflicting data sources as their biggest measurement limitations, the issue is foundational. Organizations aren't just missing insights. They're operating on measurement infrastructure that many can't use to make decisions.

50% aren't "very confident" in marketing measurement accuracy

The lack of high confidence suggests that many senior decision-makers may be operating with measurement frameworks that could be strengthened or refined.

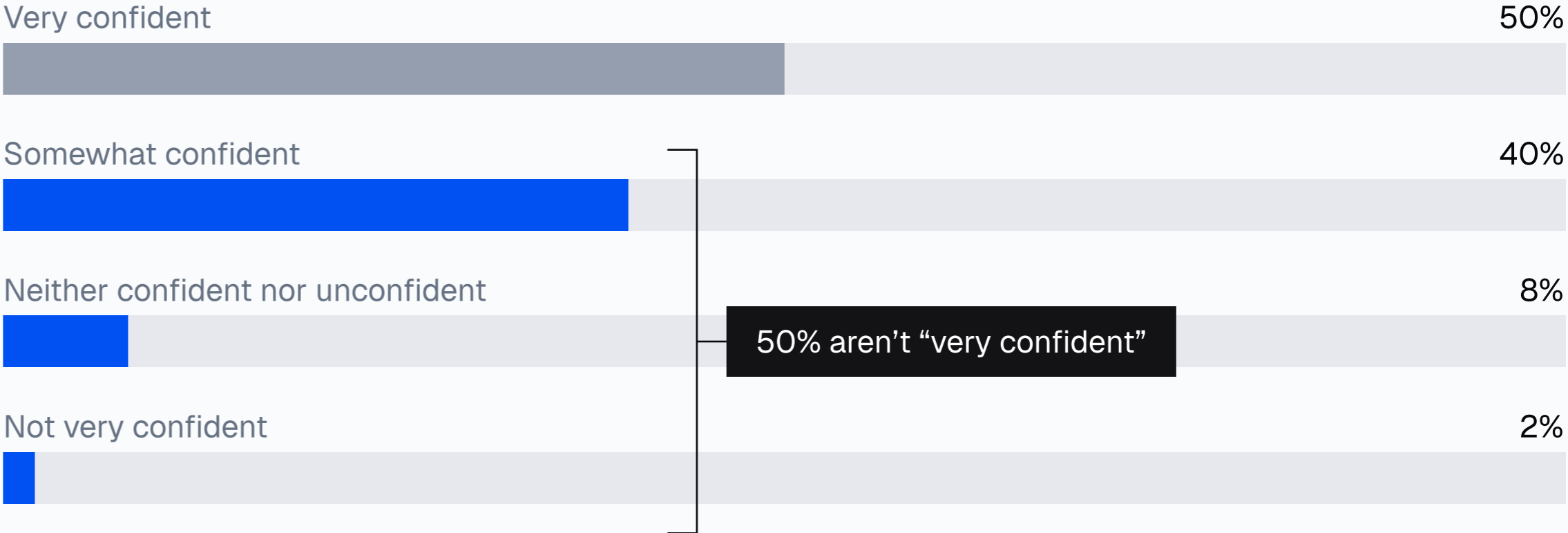
DEEPER ANALYSIS

Participants with media budgets \$100MM+ reported being the most confident, with 57% indicating they felt "very confident" in their current marketing measurement approach.

Participants managing media budgets between \$11-20MM were the least likely to indicate they felt "very confident" in their approach (46%).

CHART 1.1

Confidence in current marketing measurement approach



How confident are you in your current marketing measurement approach? Select one

35% say 20%+ of spend is inefficiently allocated

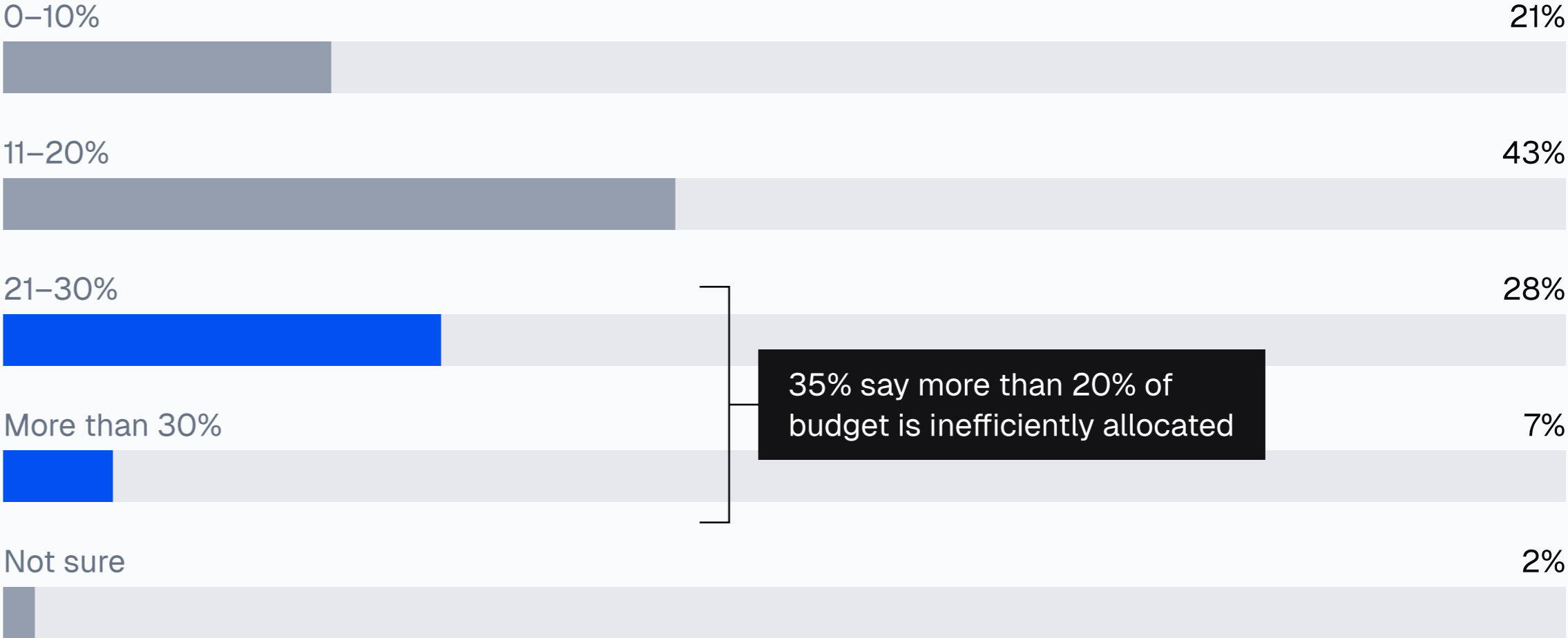
Most respondents estimate between 11-30% in paid media waste.

DEEPER ANALYSIS

Even though stated confidence in connecting marketing to business outcomes is highest among organizations spending \$51MM+ in paid media annually, this group still suspects significant budget waste – signaling organizations may feel confident, but are far from operationalizing decision-making that leads to efficient spend.

CHART 1.2

Suspected wasted spend due to poor marketing measurement



What percentage of your marketing budget do you suspect is inefficiently allocated, but cannot confirm due to poor or incomplete measurement? Select one

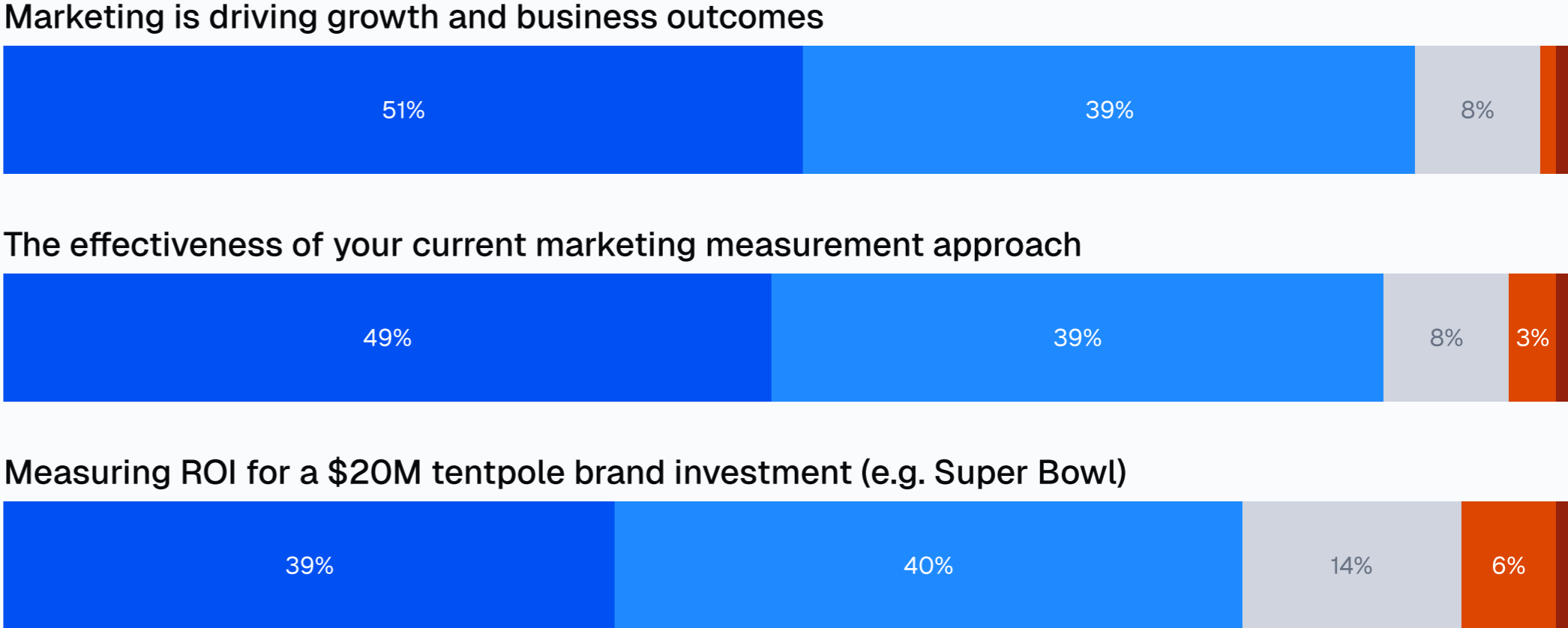
Paid media decision-makers think marketing drives growth...

... but only 39% say they're "very confident" evaluating ROI for large-scale brand investments, suggesting greater uncertainty when impact is broader or long-term.

CHART 1.3

Confidence in key marketing capabilities

Very confident Somewhat confident Neither confident nor unconfident Not very confident Not confident at all



Fewer respondents are "very confident" evaluating ROI for large-scale brand investments, suggesting greater uncertainty when impact is broader or long-term

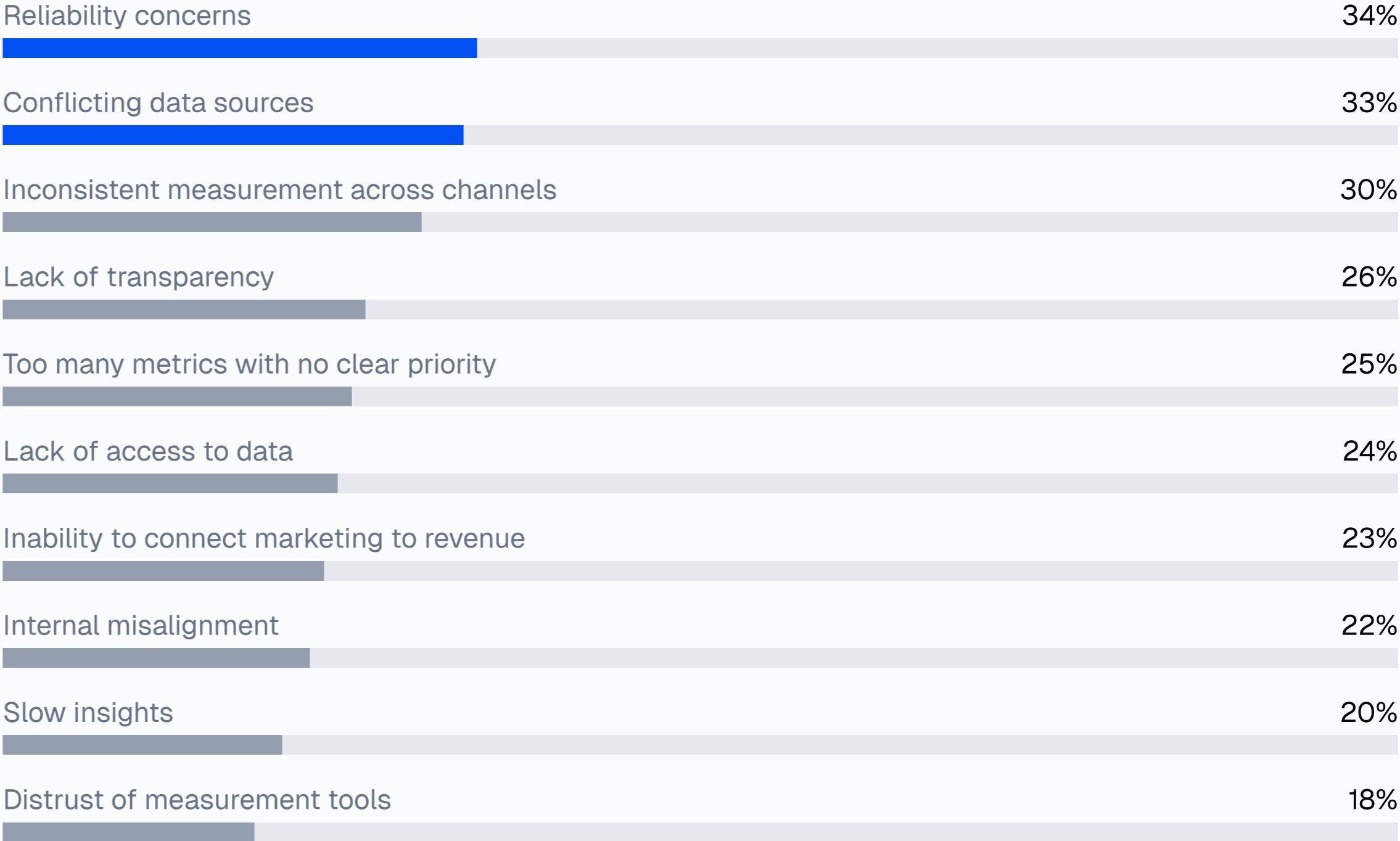
How confident are you when it comes to the following? Select one per row

Reliability concerns and conflicting data sources limit confidence and trust in current marketing measurement approaches

Uncertainty may stem less from access to tools and more from fragmented or conflicting foundations and processes.

CHART 1.4

Top barriers to marketing confidence



What limits that confidence the most? Select up to three

Marketing measurement and decision-making

Eighty-one percent say current measurement practices support experimental risk-taking – but nearly 3 in 4 have killed or scaled back a marketing idea because they couldn't confidently measure its impact. Sixty-nine percent have faced pressure to deprioritize brand-building in favor of immediate performance targets.

Marketing measurement tools aren't fully delivering either: **Only 40% say their measurement systems make it much easier to take decisive action.**

The stakes are high enough that measurement expertise is reshaping hiring. **Seven in ten leaders say they always or often hire based on experience with specific measurement tools** — meaning measurement capability isn't just an operational consideration, it's a talent strategy.

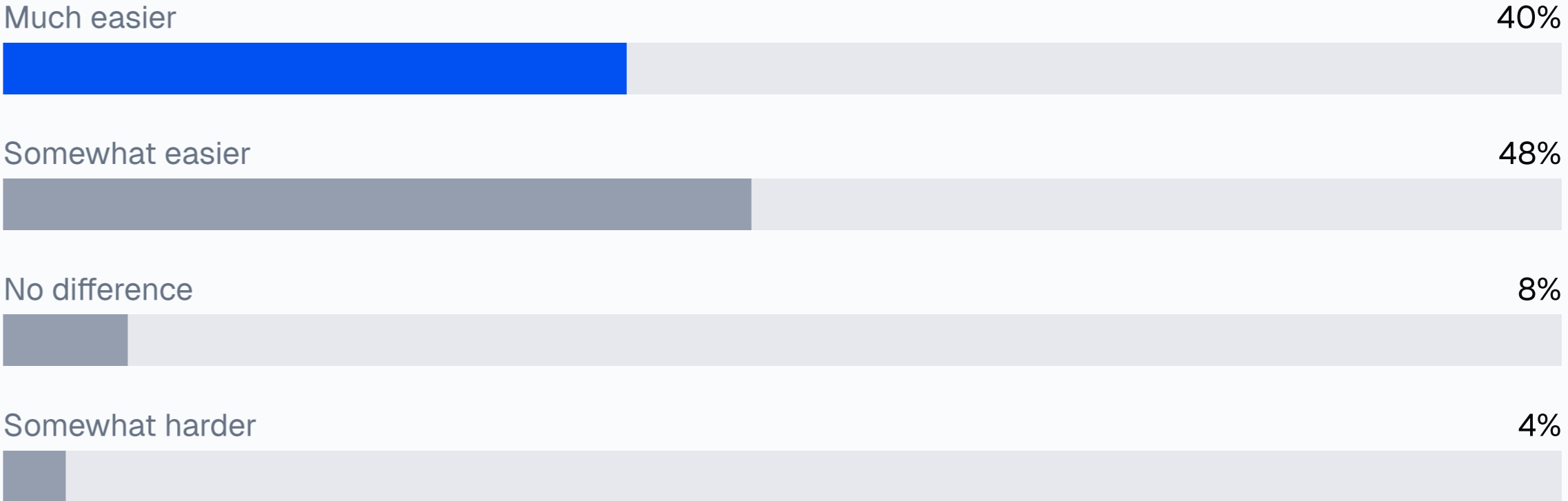
And yet, despite all that investment in tools and people, **only half say they measure what truly drives growth and business outcomes.** The other half are still measuring what's expected, visible, or easy to access.

Only 2 in 5 say their current marketing measurement tools make it much easier to take decisive action

Nearly half (48%) say they only make it somewhat easier, suggesting that many organizations may still lack the clarity required for fully confident, rapid decision-making.

CHART 2.1

Impact of marketing measurement tools on decisive action



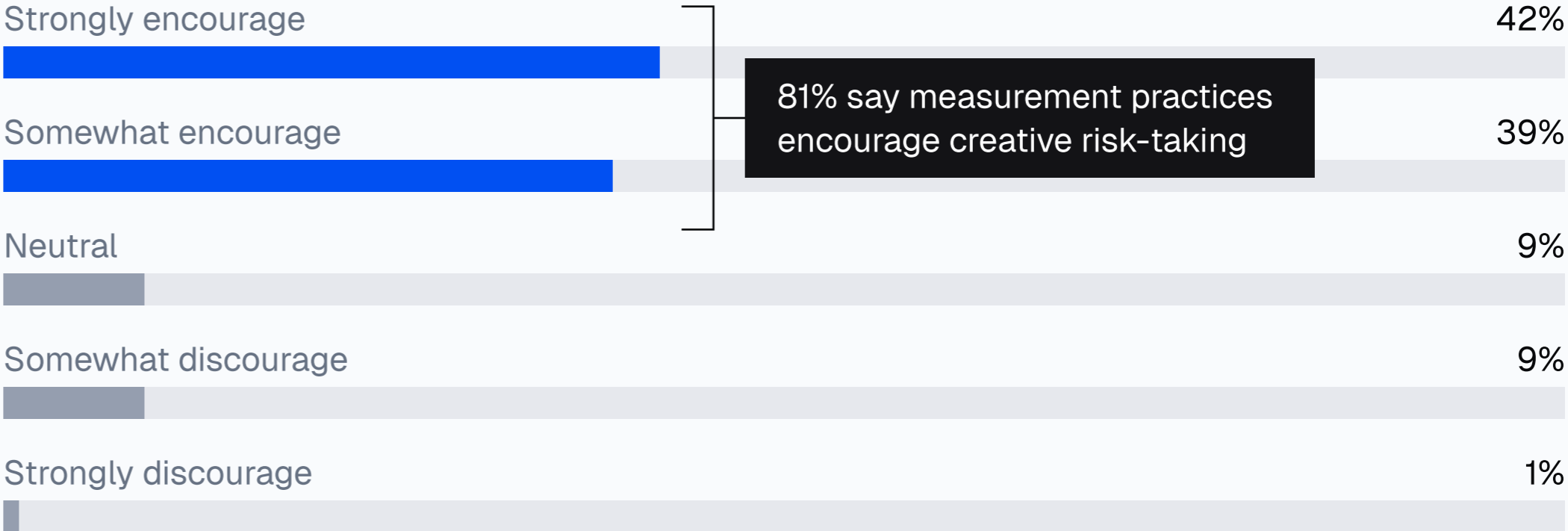
Do your current marketing measurement tools and processes make it easier or harder to take decisive action? Select one

4 out of 5 (81%) say current marketing measurement practices encourage creative risk-taking...

1 in 10 (10%) believe they discourage it, suggesting that while measurement is broadly seen as enabling creativity, it may not do so consistently across organizations.

CHART 2.2

Impact of marketing measurement practices on creative risk-taking



In your opinion, to what extent do current marketing measurement practices encourage or discourage creative risk-taking? Select one

... but 74% of respondents say they've killed or scaled back a marketing idea because they weren't confident in measuring its impact

69% report being pressured to deprioritize brand-building initiatives in favor of immediate performance and revenue targets

DEEPER ANALYSIS

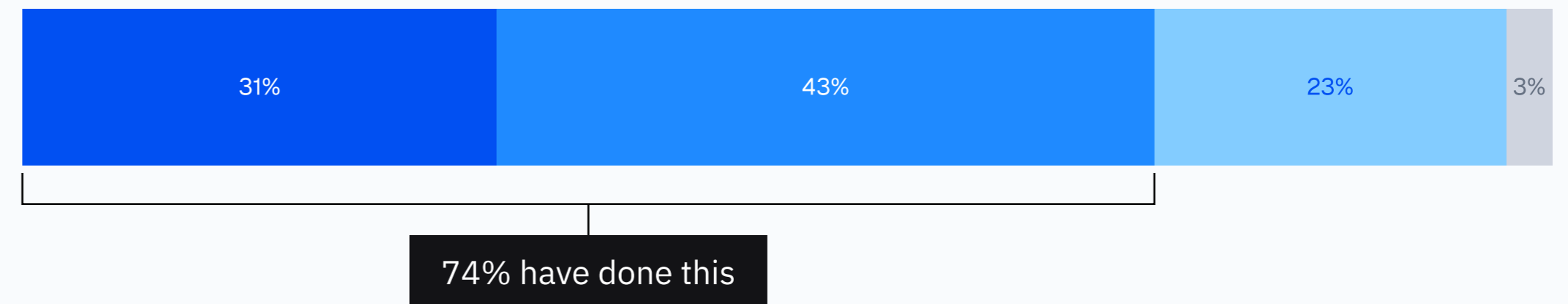
When impact cannot be defensibly quantified, organizations may default to safer, short-term performance initiatives, potentially constraining brand-building and creative experimentation.

CHART 2.3

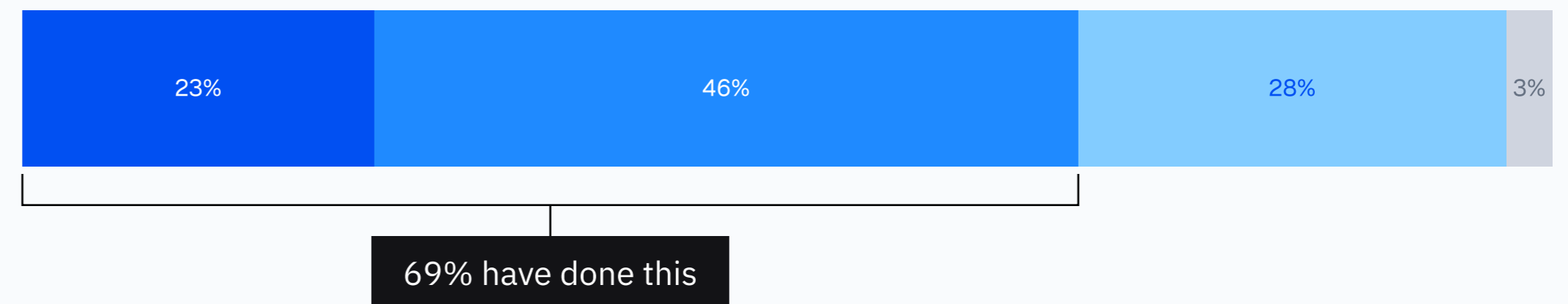
Frequency of measurement and performance pressure impacting marketing decisions

● Multiple times ● Once or twice ● Never ● Not sure

Killed or scaled back a marketing idea due to not being confident in measuring its impact



Was pressured to kill a brand-building campaign in favor of immediate performance targets



To what extent have the following scenarios happened to you? Select one per row

Experience with marketing measurement tools serves as a competitive advantage in the job market

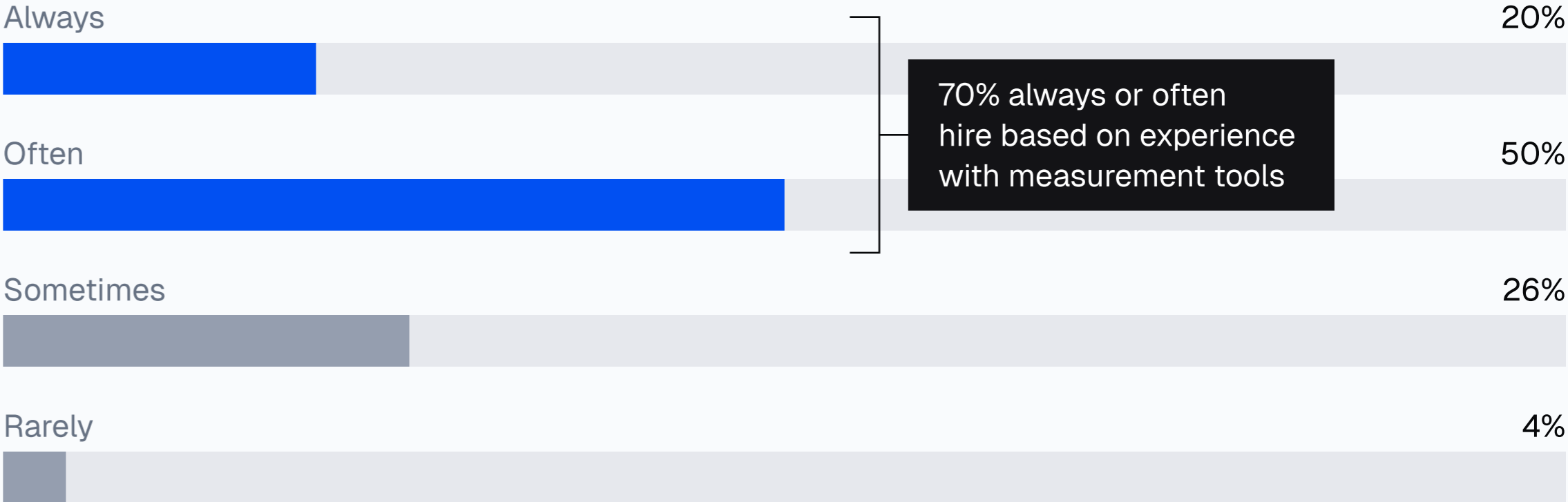
Organizations are hiring based on experience with specific marketing measurement tools, with 7 in 10 (70%) doing so always or often.

7 in 10

Always or often hire based on experience with measurement tools

CHART 2.4

Frequency of hiring based on marketing measurement tool experience



How frequently do you hire based on experience with specific marketing measurement tools? Select one

Incrementality testing tops the list of most-trusted marketing measurement solutions

Media mix modeling (MMM), in-platform reporting, and multi-touch attribution (MTA) round out the next most trusted solutions.

DEEPER ANALYSIS

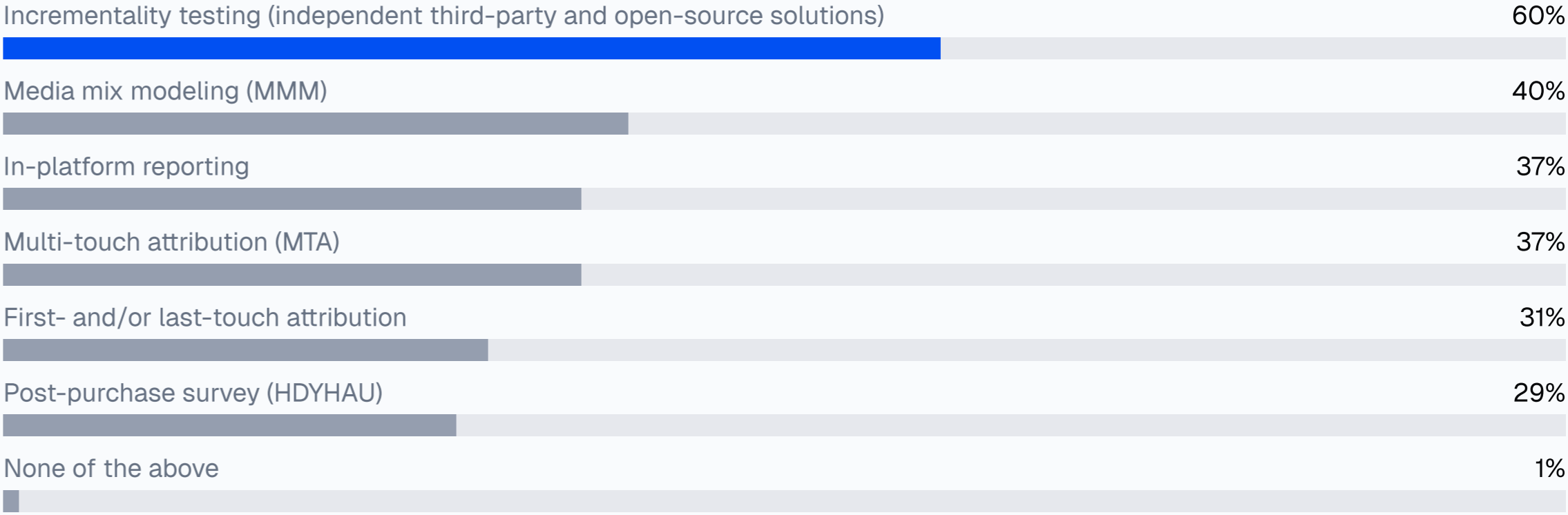
Organizations don't have a single trusted marketing measurement solution, suggesting fragmentation in how organizations understand performance.

60%

Cite incrementality testing as their most-trusted marketing measurement solution

CHART 2.5

Most trusted marketing measurement solutions



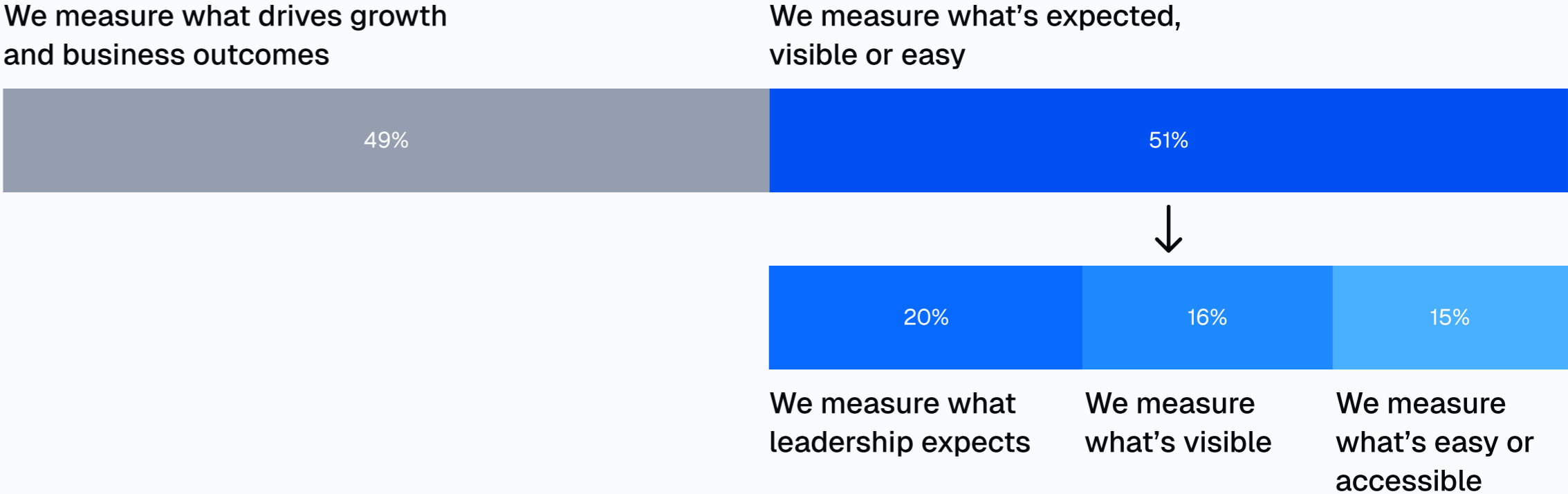
Which of the following, if any, are your most trusted marketing measurement solutions? Select up to three

Only half (49%) of marketing and finance leaders say they measure what drives growth and business outcomes

The other half (51%) report measuring what is “expected, visible, or easy to access.”

CHART 2.6

Measuring what drives growth vs. what's easy or expected



Which statement best reflects your current state of marketing measurement? Select one

AI in marketing

Eighty-three percent feel confident using AI to drive performance. But only half feel confident explaining AI-driven ROI to the board. Leaders believe the tools are working. They just can't always prove it in the room where budgets get approved.

That disconnect sits alongside a deeper strategic tension. **Seventy-one percent believe current AI tools prioritize short-term performance over long-term brand growth** — a concern that's hard to ignore given how many organizations are already under pressure to deprioritize brand-building in favor of immediate results.

Nearly 4 in 5 leaders say they're being pushed to integrate AI tools to drive performance. Sixty-three percent feel pressure to deliver more with fewer resources because of AI. Adoption isn't really a choice anymore — it's an expectation.

The result is a marketing AI landscape where execution confidence is high and strategic accountability is lagging. Organizations are moving fast. The measurement infrastructure to explain what's causing impacts has yet to broadly catch up.

Leaders struggle to articulate ROI of AI marketing tools

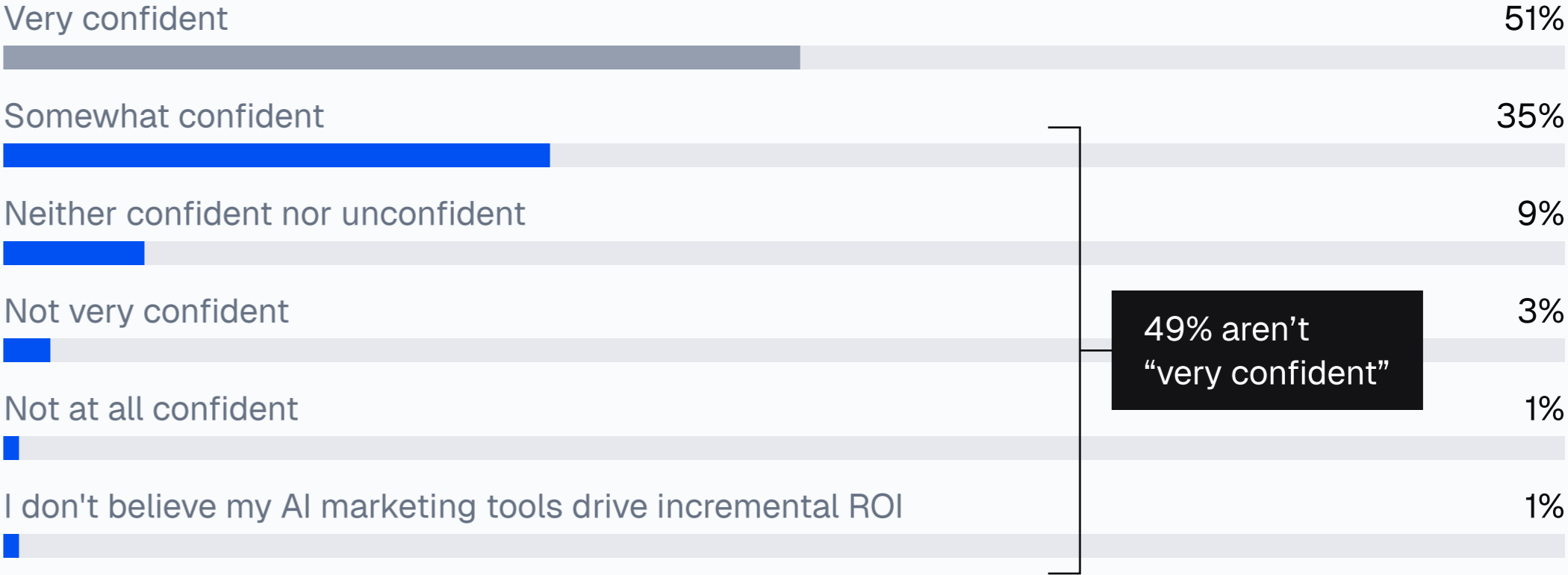
Almost all respondents believe AI marketing tools drive incremental ROI, however, **only 51% are very confident** explaining this ROI to the board — suggesting that decision-makers haven't yet cracked how to articulate incremental value from AI marketing tools.

49%

aren't very confident explaining the ROI of AI marketing tools

CHART 3.1

Confidence in explaining AI marketing tool ROI to board members



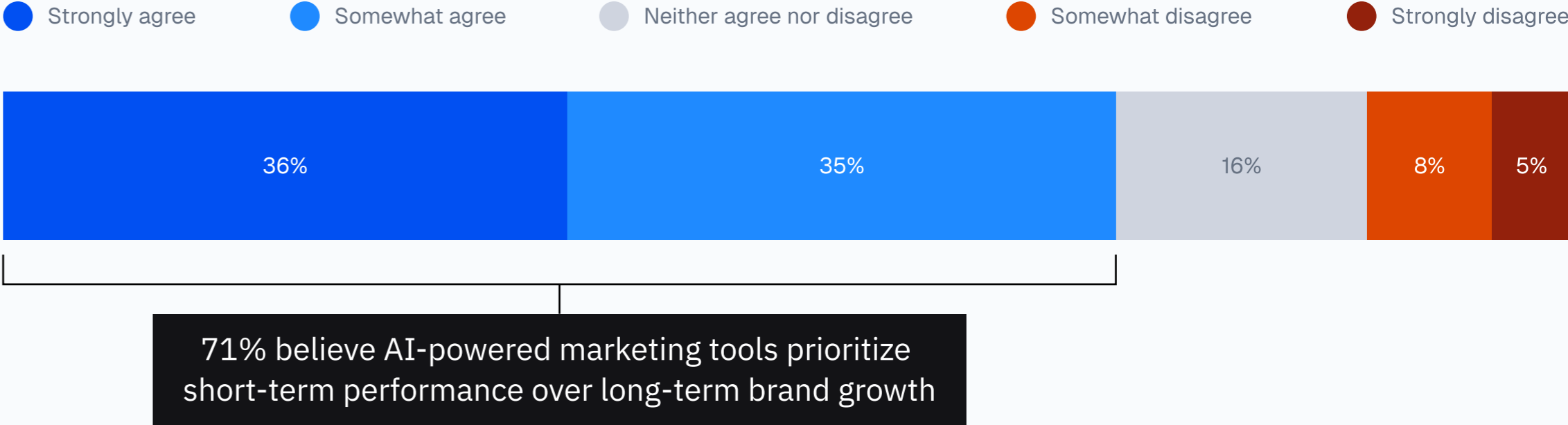
How confident would you feel explaining the ROI of your AI marketing tools to your board? Select one

71% believe AI marketing tools prioritize short-term performance over long-term brand growth

The findings suggest an underlying tension between immediate performance and sustained brand-building.

CHART 3.2

AI-powered marketing tools prioritize short-term performance at the expense of long-term brand growth



To what extent do you agree or disagree with the following statements? Select one per row

Statement: AI-powered marketing tools prioritize short-term performance at the expense of long-term brand growth

Organizations face pressure to adopt AI-powered marketing tools

While most feel confident using AI tools, adoption is taking place under significant operational pressure: **78% say marketing leaders are being pushed to integrate AI**, and **63% feel pressure to deliver more with fewer resources due to AI**.

DEEPER ANALYSIS

19% of respondents say they do not feel pressure to do more with less because of AI-powered marketing tools.

CHART 3.3

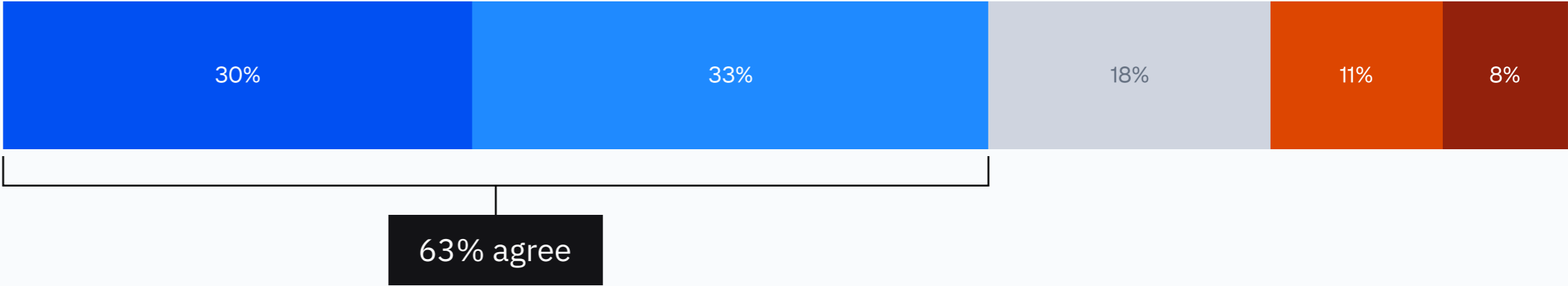
Agreement with statements on AI pressure in marketing

● Strongly agree ● Somewhat agree ● Neither agree nor disagree ● Somewhat disagree ● Strongly disagree

Marketing leaders are being pressured to integrate AI-powered marketing tools to drive performance



I feel the pressure to do more with less because of AI



To what extent do you agree or disagree with the following statements? Select one per row

Marketing channels and investments

57% of leaders feel most confident justifying ROI for both Google Search and YouTube – and generally, channels that leaders feel most comfortable defending from a measurement POV are expected to see increased investment.

Buzzy channels like retail media networks (RMNs) and connected TV (CTV) land in the middle of pack in terms of potential future investment: **CTV is gaining serious consideration, with most interested organizations positioning it as a brand and reach channel measured on awareness and incremental lift** — not a performance driver.

RMNs are broadly valued but not universally loved. **Three quarters see them as important or must-have. One in five calls them overhyped, too fragmented, or a cost of doing business with retailers.**

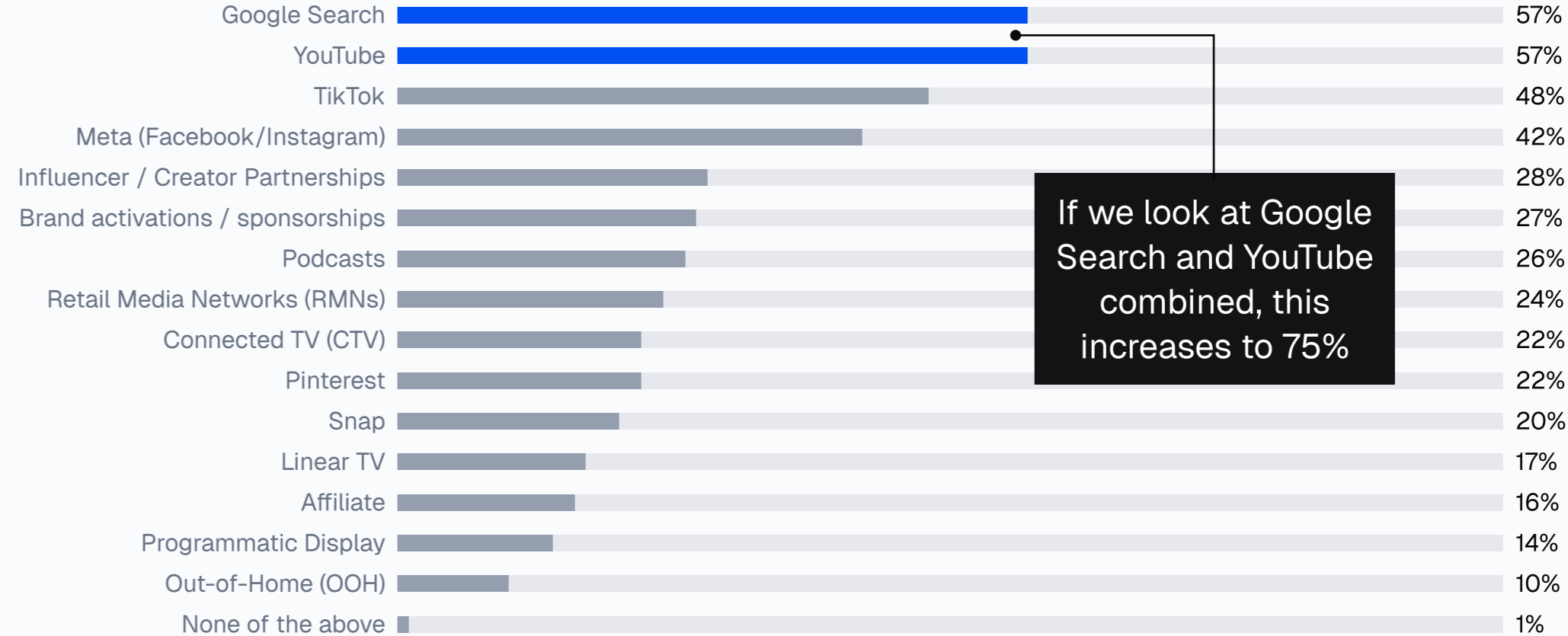
Respondents feel most confident defending investments in Google Search and YouTube

DEEPER ANALYSIS

Confidence appears concentrated in a small set of established digital platforms, creating a clear tier between Google Search / YouTube and the rest of the ecosystem.

CHART 4.1

Channels most defensible from a measurement and ROI standpoint in 2026



Which channels do you feel most confident defending from a measurement and ROI standpoint in 2026? Select all that apply

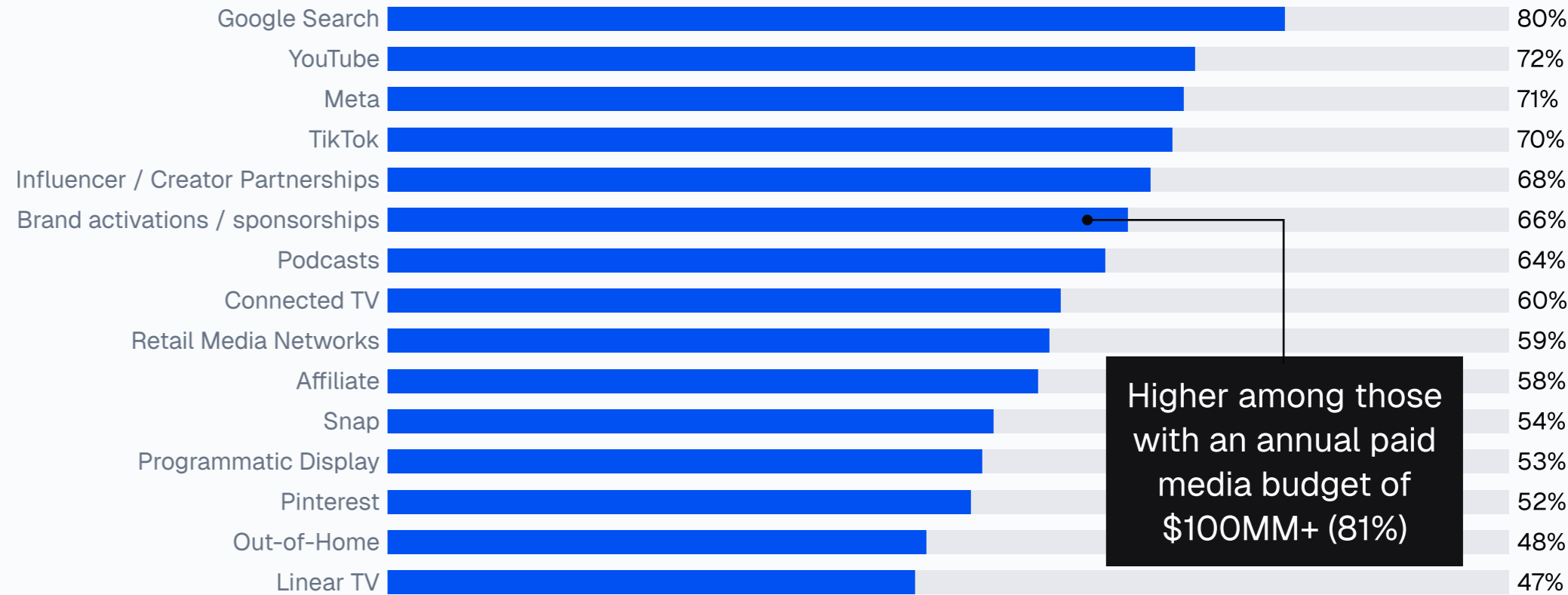
Brands expect increased investment in Google Search, YouTube, and Meta in 2026

Generally, channels that leaders feel most comfortable defending from a measurement standpoint are expected to benefit from increased investment.

Among respondents with annual paid media budgets \$100MM+, 81% of respondents plan to scale up brand activations and sponsorships, compared to 66% of respondents with paid media budgets under \$100MM.

CHART 4.2

Channels expected to see increased marketing investment in 2026



This chart reflects the percentage of respondents who indicated expected paid media increases in a given channel in response to the question, “Looking ahead to 2026, how do you expect your organization’s marketing investment to change across the following platforms and channels? Select one per row.”

Growth goals fuel planned increases in paid media spend

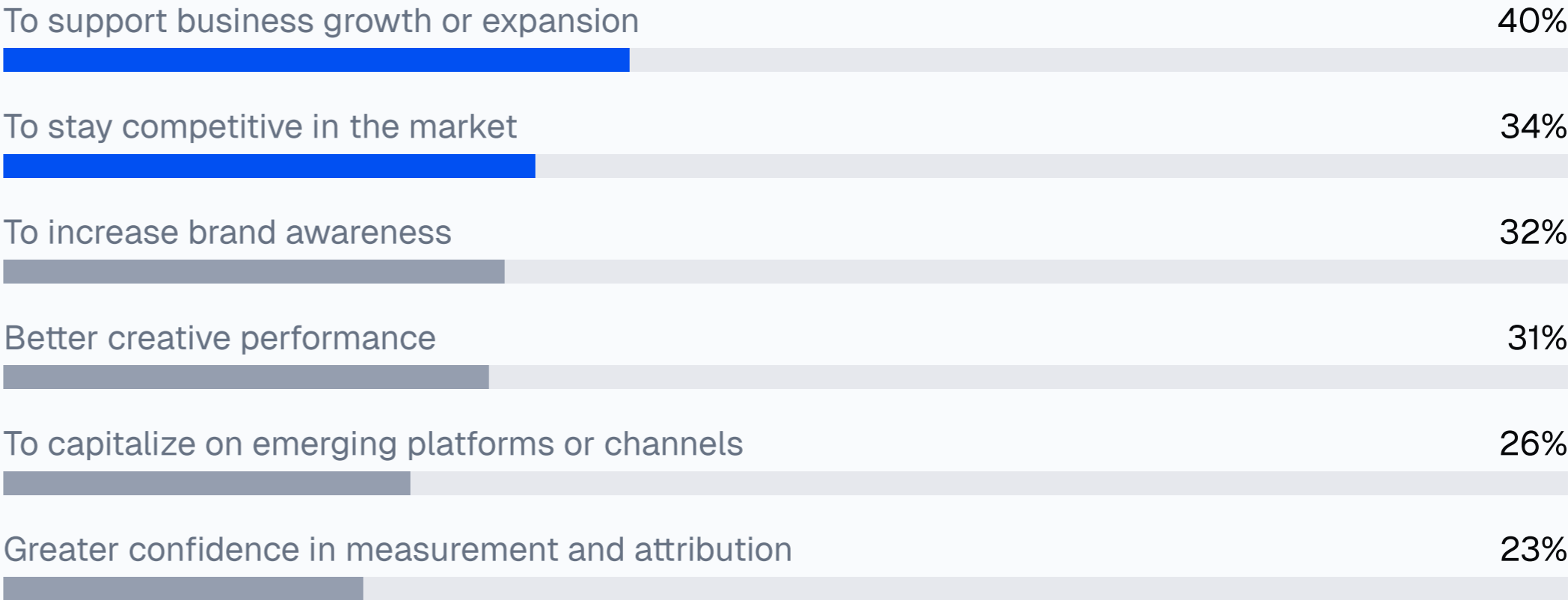
Among organizations planning to increase their marketing investment in at least one channel, the primary drivers are to support business growth (40%) and to stay competitive in the market (34%).

DEEPER ANALYSIS

While growth and competitiveness dominate, nearly 1 in 4 cite greater confidence in measurement and attribution as a key driver, reinforcing that measurement maturity remains closely tied to investment decisions.

CHART 4.3

Top reasons for planned increases in marketing investment (among those planning to increase spend)



Why are you planning to increase? Select up to two.

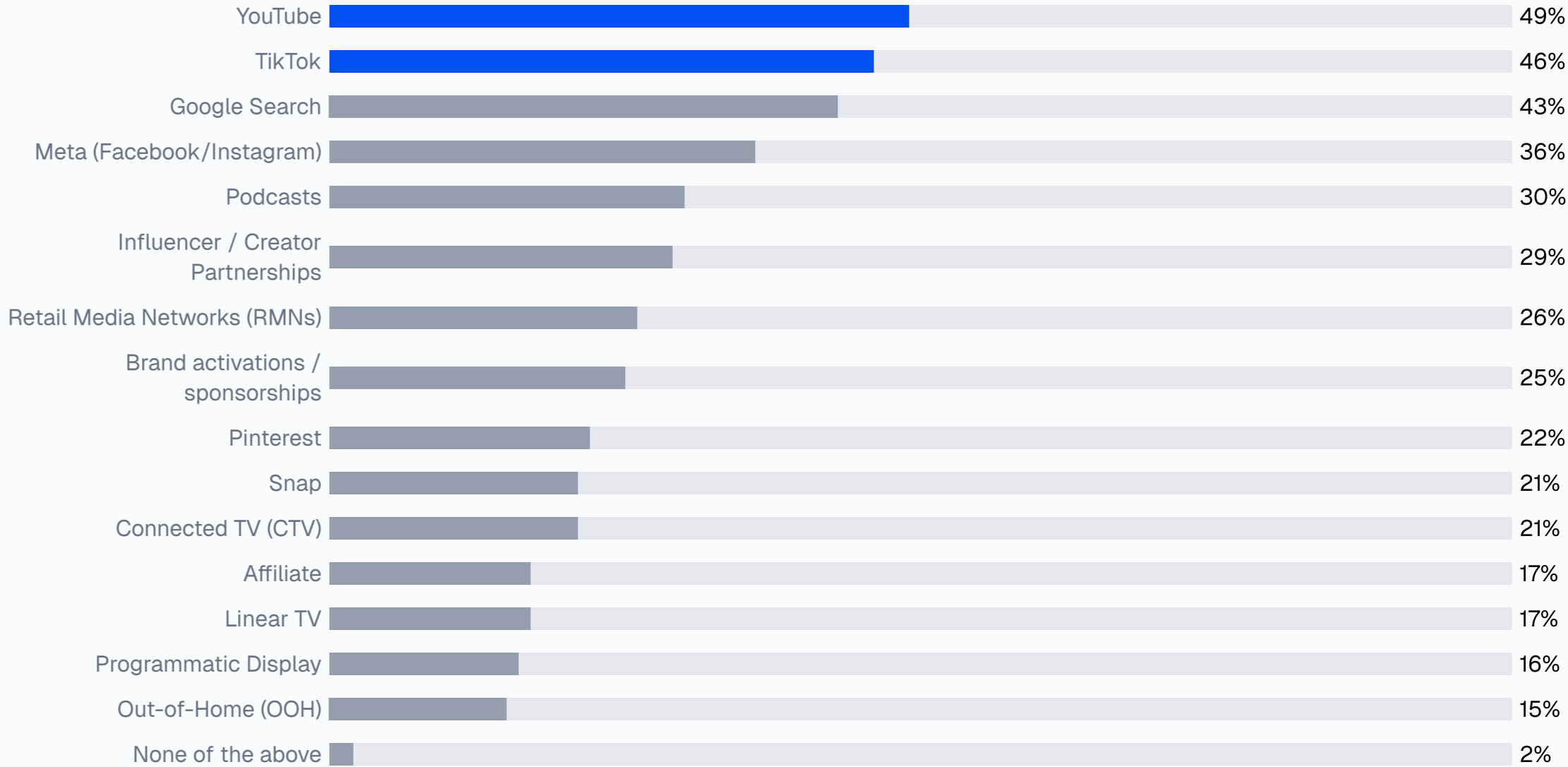
*Asked to those planning to increase their marketing investment in at least one platform or channel

Businesses seek to optimize video, podcasts, and influencer partnerships in 2026

Channels like retail media networks (RMNs), brand activations/sponsorship, and connected TV (CTV) land in the middle of the pack when it comes to potential future investment.

CHART 4.4

Channels of greatest interest to explore in 2026



Which channels are you most interested in further exploring in 2026? Select all that apply

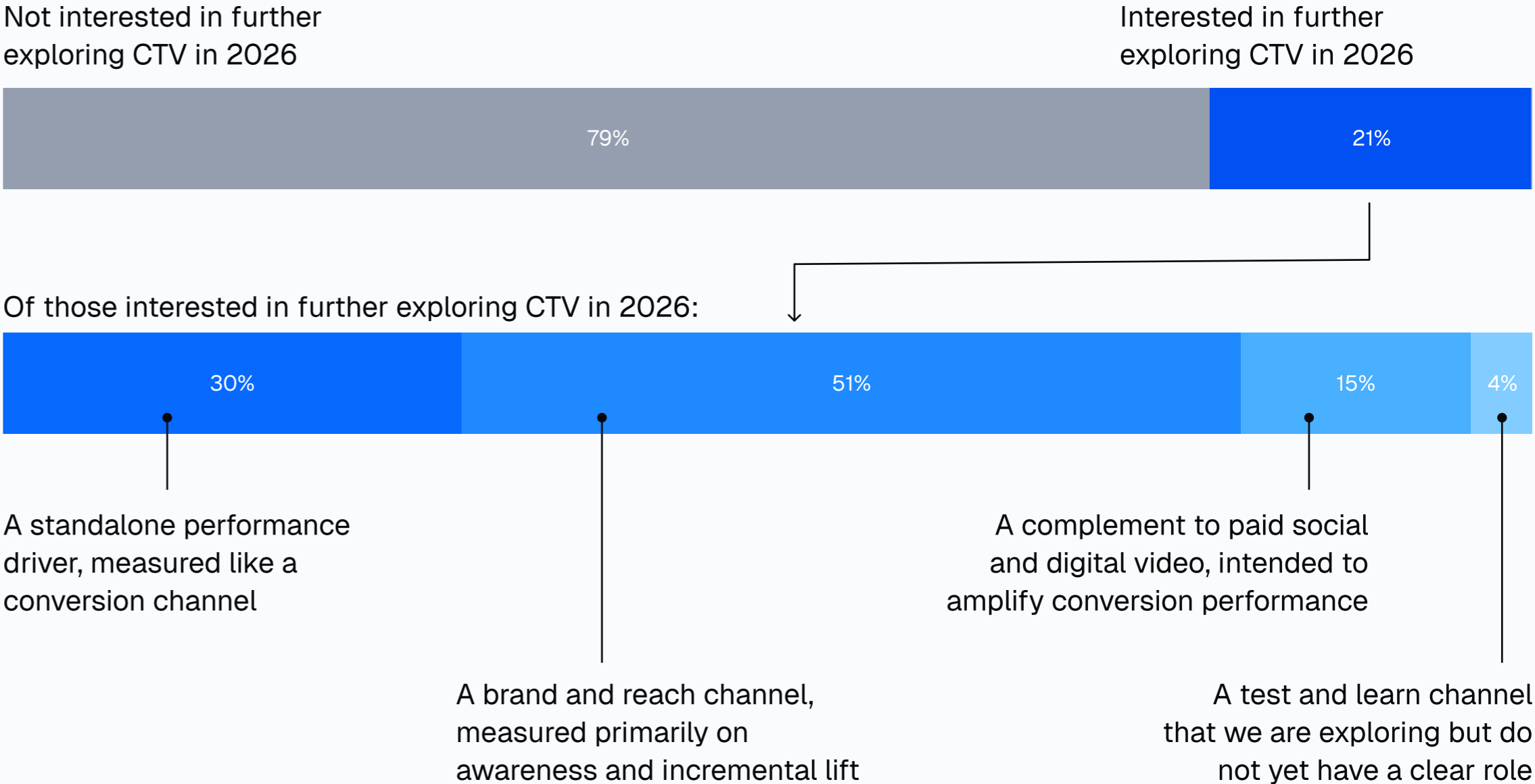
Brands eye CTV to further brand and reach

Of those interested in further exploring CTV in 2026, half say its primary role would be as a brand and reach channel.

Only 4% consider CTV a channel they are “exploring” but haven’t found a clear role for yet.

CHART 4.5

Expected primary role of CTV in the marketing mix in 2026 (among those interested in exploring CTV)



You indicated Connected TV (CTV) as a channel you are curious about exploring in 2026. What is the primary role you expect CTV to play in your marketing mix? Select one

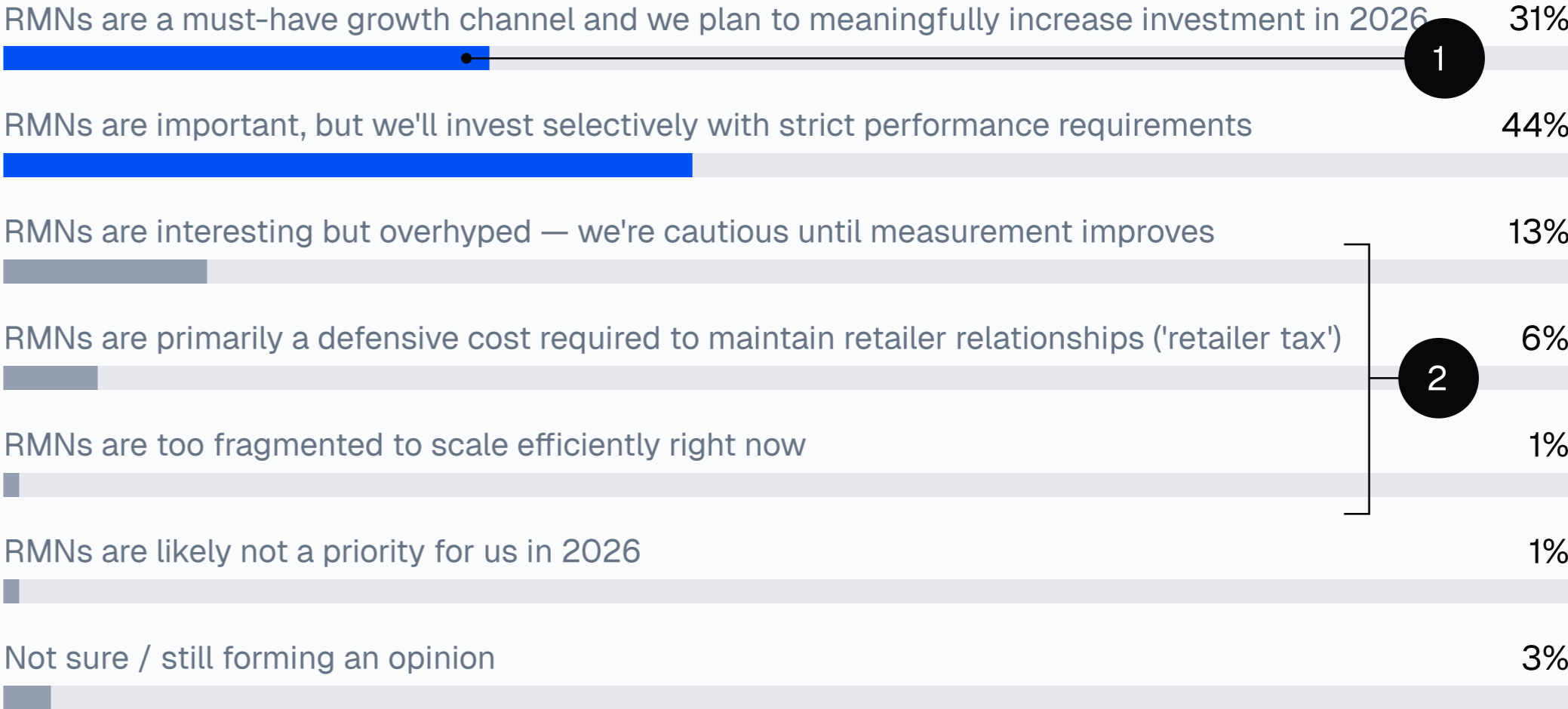
*Asked to those who are interested in exploring CTV further in 2026

Retail media networks (RMNs) viewed as important levers

Generally, RMNs are seen as a must-have growth channels (31%) or important (44%). But 1 in 5 (20%) say they are over-hyped, a cost required to maintain retailer relationships, or too fragmented.

CHART 4.6

Current view of Retail Media Networks: must-have growth channel vs. selective investment



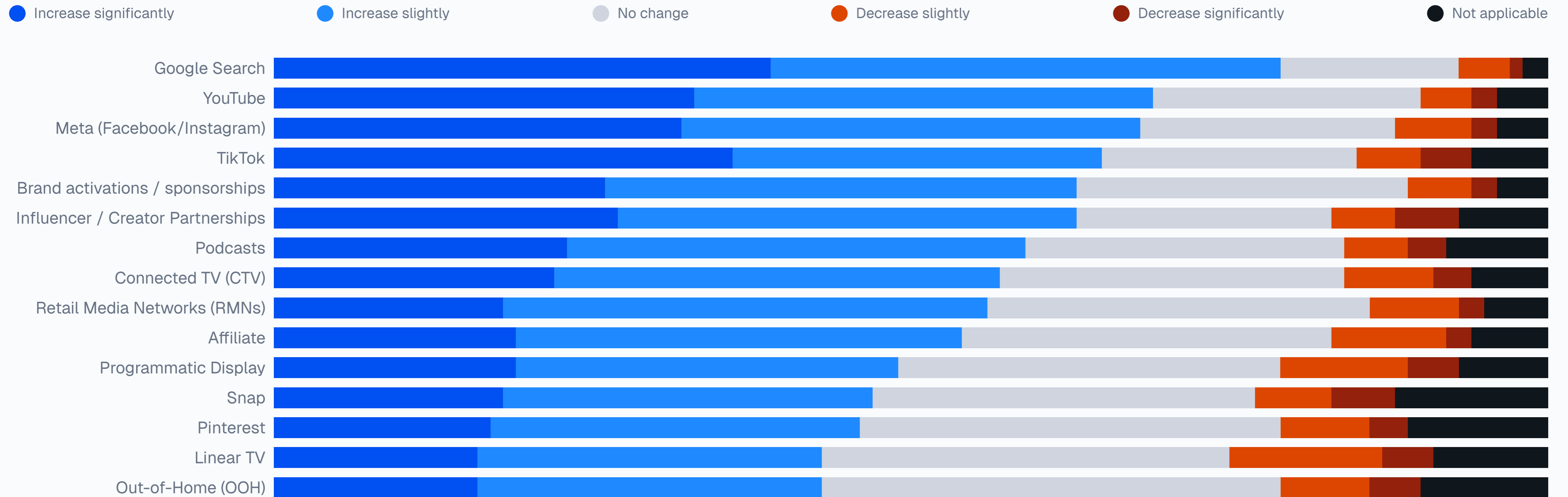
1 20% say RMNs are overhyped, a cost required to maintain retailer relationships or too fragmented

2 This rises to 48% for those working in Technology / Software / SaaS and 46% for Marketplaces

Which statement best reflects your current view of Retail Media Networks (RMNs)? Select one

CHART 4.7

Expected changes in marketing investment by channel in 2026



Looking ahead to 2026, how do you expect your organization's marketing investment to change across the following platforms and channels? Select one per row

Brands planning to decrease marketing investment cite low cost efficiency as the primary driver (39%)

This figure rises to 50% among brands with an annual paid media budget of \$100MM+.

About a third of all respondents report difficulty connecting spend to revenue as a core reason for expected spend-downs.

DEEPER ANALYSIS

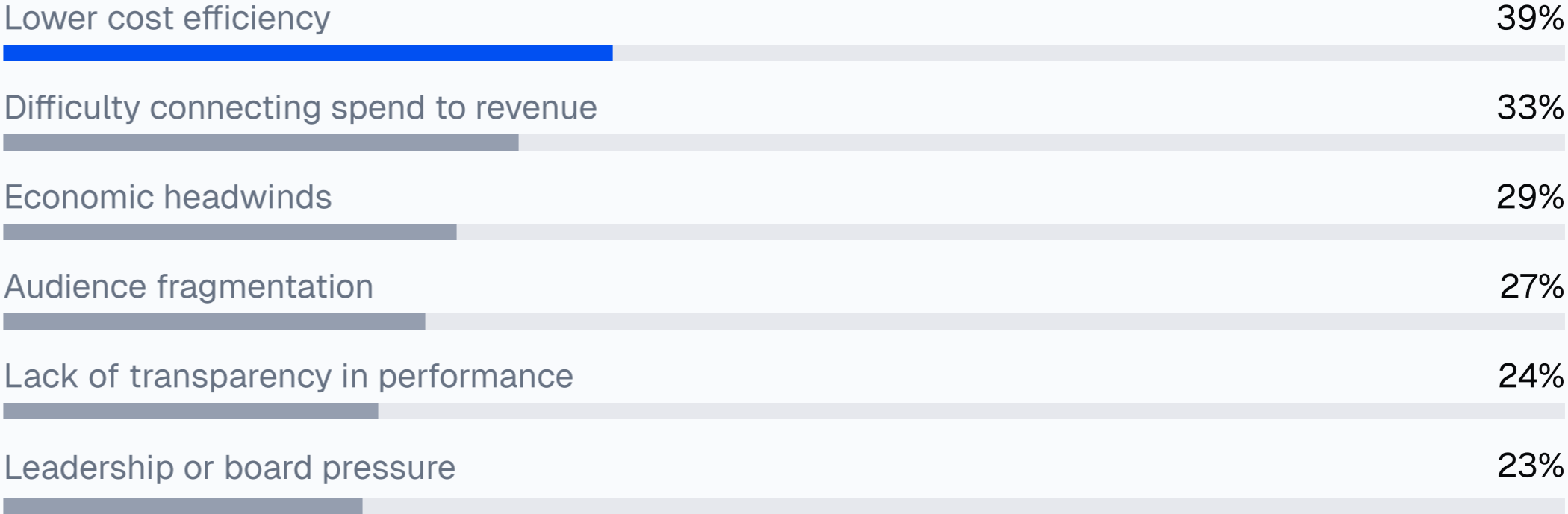
Nearly a quarter report planned investment decreases due to leadership or board pressure.

50%

Rises to 50% among those with an annual paid media budget of \$100MM+

CHART 4.8

Top reasons for planned decreases in marketing investment (among those planning to decrease spend)



Why are you planning to decrease? Select up to two

*Asked to those planning to decrease their marketing investment in at least one platform or channel

What's your next move?

Haus' 2026 Decision Confidence Index reveals that marketing leaders operate with substantial tools, budgets, and talent. But many lack confidence that their measurement holds up under financial scrutiny.

When organizations cannot clearly connect marketing investment to incremental business outcomes, the gap between activity and accountability widens.

This is a solvable problem. At Haus, we believe causal marketing measurement is the foundation of defensible decision-making. Organizations that embrace this shift move faster, align marketing and finance more effectively, and build durable growth that compounds over time.

We'll continue tracking how these industry challenges evolve. If you're exploring how to strengthen confidence in your marketing investment decisions, we welcome the conversation.

Many thanks to the extraordinary participants whose candor and thoughtfulness made this research possible.

[Stay up to date](#)