

The identity gap: How marketers perceive success and where performance breaks down

Insights on how marketers are using identity resolution across strategy and operations today





Marketers feel effective—until growth and complexity expose a gap.

As marketing organizations balance growth and accountability, the way they understand and reach audiences has become increasingly critical—and increasingly difficult. Channels have multiplied, customer journeys have fragmented and the volume of available data has exploded.

Identity resolution has emerged as a foundational solution to connect data, recognize individuals and help reach audiences across channels.

This report examines how marketers are navigating these challenges, and how marketing performance differs between those who use identity resolution and those who don't. The findings suggest that while many marketers believe they are succeeding today without deeply integrated identity, they are underperforming relative to what's possible.

The report points to a broader tension shaping modern marketing: **Identity does not emerge as a concern overnight, but rather, it becomes visible over time as marketers are asked to do more with their data and demonstrate impact.**

Examining how marketers experience this shift reveals when identity starts to matter more and why it increasingly defines the gap between perceived success and real effectiveness.

What is identity resolution?

Identity resolution is the process of recognizing an individual by connecting their identifiers and interactions across channels into a single, unified profile.

Let's begin.

Methodology

The American Marketing Association, in partnership with Epsilon, conducted an online survey of 203 U.S. business-to-consumer marketers at organizations with more than 500 employees, all at manager level or above. The survey ran in April 2026.

Please note that in charts, percentages may not total 100% due to rounding.

About Epsilon

Epsilon is a global leader in data and identity with deep expertise in digital media, clean rooms, customer data platforms, loyalty and marketing services. Positioned at the center of Publicis Groupe, Epsilon helps brands deliver personalized experiences at scale and build lasting customer relationships by unlocking the full potential of data and identity. Epsilon operates in 30+ countries across EMEA, the Americas and APAC with more than 8,000 employees. For more information, visit www.epsilon.com.

About the American Marketing Association (AMA)

As the leading global professional marketing association, the AMA is the essential community for marketers. From students and practitioners to executives and academics, we aim to elevate the profession, deepen knowledge, and make a lasting impact. The AMA is home to five premier scholarly journals including: Journal of Marketing, Journal of Marketing Research, Journal of Public Policy and Marketing, Journal of International Marketing, and Journal of Interactive Marketing. Our industry-leading training events and conferences define future forward practices, while our professional development and PCM® professional certification advance knowledge. With almost 70 chapters and a presence on 350 college campuses across North America, the AMA fosters a vibrant community of marketers.

The association's philanthropic arm, the AMA's Foundation, is inspiring a more diverse industry and ensuring marketing research impacts public good. The AMA Foundation strengthens and elevates the marketing profession by advancing knowledge, building a global community of marketing leaders, and supporting marketing initiatives that drive innovation and societal impact.

AMA views marketing as the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. You can learn more about AMA's learning programs and certifications, conferences and events, and scholarly journals at AMA.org.

Key findings

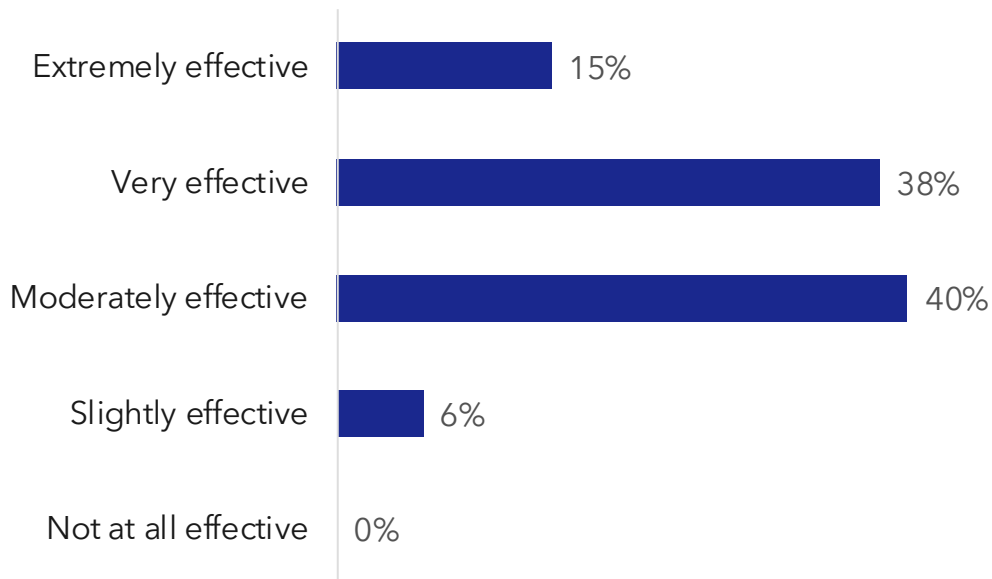


Many marketers believe their marketing is working.

53%

of marketers rate the overall effectiveness of their marketing as very or extremely effective.

Rate the overall effectiveness of your marketing



● Rate the overall effectiveness of your marketing

Many marketers feel confident their marketing is working. But that confidence is often based on high-level measures and does not fully reflect performance across more complex marketing activities.

KEY FINDINGS

When performance is compared, identity users stand apart.

As expectations shift toward relevance, personalization and measurement, performance is tested more rigorously. Under closer scrutiny, identity resolution—the ability to connect customer data across channels into a unified view—emerges as a clear differentiator.

Reaching prospects

64%

of marketers using identity resolution say they are very or extremely effective at reaching individual prospects.

Maximizing campaigns

58%

of marketers using identity resolution say their digital campaigns are very or extremely effective.

Delivering personalization

68%

of marketers using identity resolution say they can very or extremely effectively deliver personalized campaigns.

31%

of marketers not using identity resolution say the same.

23%

of marketers not using identity resolution report the same level of effectiveness.

39%

of marketers not using identity resolution say the same.

KEY FINDINGS

Identity delivers value—but is not fully realized.

81%

of marketers using identity resolution say it has improved their marketing effectiveness.

Impact is clear, but adoption remains uneven.

41%

of identity users say identity resolution is applied to only half or fewer of their marketing solutions.

41%

of identity users say they are not using their identity resolution solution to the best of its ability.



Taken together, these findings suggest that while many organizations are benefiting from identity resolution, shallow deployment and uneven execution are limiting the overall impact.

CORE CONCEPT

Audience expansion: moving beyond known audiences introduces new friction

Audience expansion is often where marketing confidence is first put to the test. As organizations seek to acquire new customers and reach individuals they know less about, they move into environments with few signals, less certainty and greater reliance on their underlying data and technology foundations. While many marketers feel capable and comfortable reaching familiar customers, expanding beyond known audiences introduces new execution challenges that are not always immediately visible.

Audience growth puts pressure on marketing performance.

Marketers say identifying prospects (**93%**) is just as high a priority as identifying existing customers (**94%**). This parity in priority puts pressure on marketers, requiring them to perform across audiences they know well and those they do not. That pressure exposes a clear gap.

Confidence is higher for known audiences.

88%

say they can very or extremely effectively understand and identify existing customers.

Confidence drops with less-known audiences.

72%

say they can very or extremely effectively understand and identify prospects.

One marketer interviewed for this research noted:

"We have a lot of insight and data on our own core consumer ... our challenge is trying to identify growth audience."



Identity resolution is the differentiator beyond existing customers.

For known customers, identity resolution's value is less pronounced.

+7 points

difference between identity users and non-users who rate themselves very or extremely effective at understanding and identifying existing customers.

For prospects, the gap widens dramatically.

+23 points

difference between identity users and non-users who rate themselves very or extremely effective at understanding and identifying prospects.

Self-rated confidence diverges most at the top end.

3x difference

Identity users are three times as likely to say they are extremely effective with understanding and identifying prospects.

Identity matters most when marketers try to expand their audience

Execution is where audience expansion breaks down.

Identifying prospects is one thing. Reaching them is harder.

Marketers are mostly confident when it comes to identifying prospects, but that confidence drops when it's time to reach them. While three out of four marketers say they can very or extremely effectively understand and identify prospects, only half say they effectively reach individual prospects.

51%

of marketers say they can very or extremely effectively reach individual prospects.

Marketers' ability to reach individual prospects depends on identity resolution.

64%

of marketers using identity resolution say they are very or extremely effective at reaching individual prospects.

31%

of marketers not using identity resolution say the same.

VS.

As uncertainty increases beyond known customers, limitations in execution become more apparent. Identifying prospects may feel manageable, but building and activating audiences for campaigns proves much harder.

CORE CONCEPT

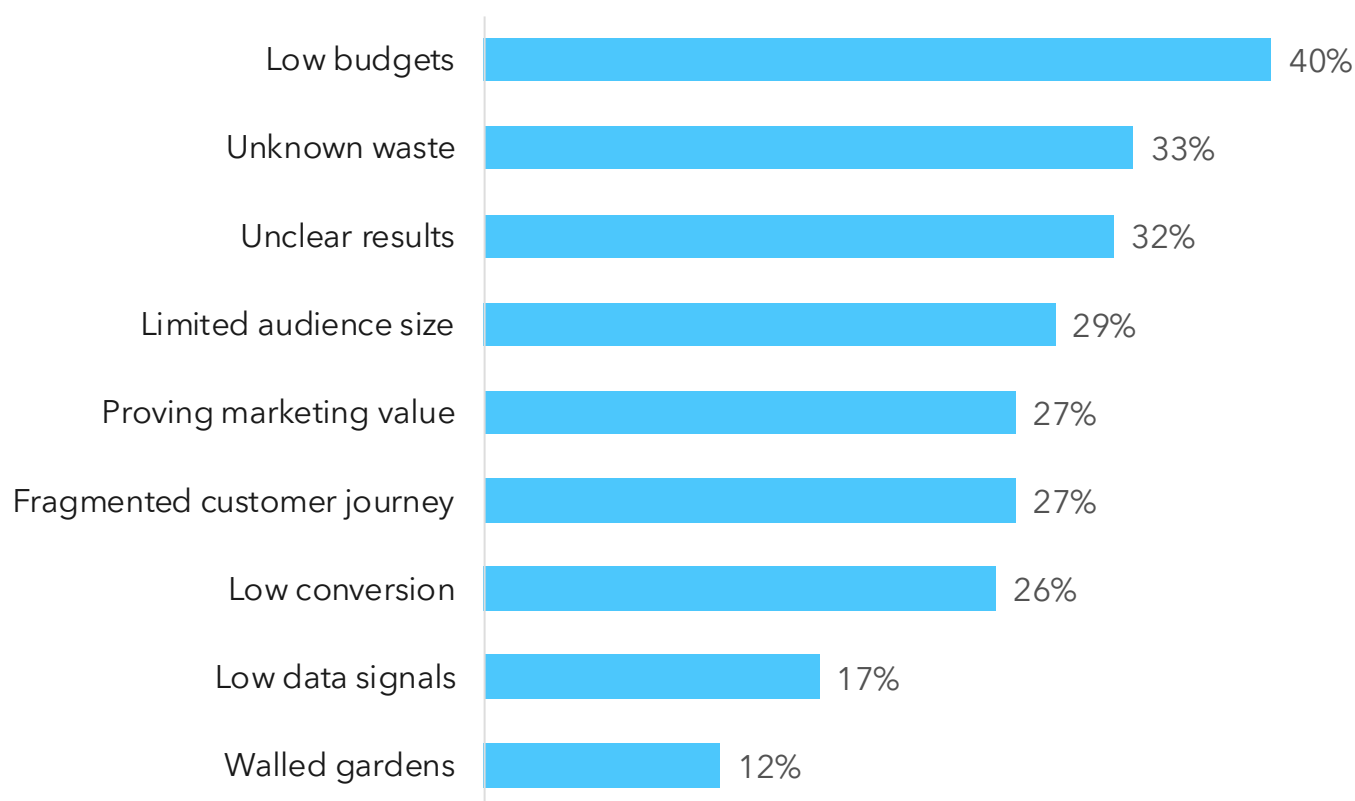
Operational maturity: operational scale exposes limits in how marketing systems work together

As marketing organizations grow, success increasingly depends on how well systems, data and teams operate in concert. New channels and expanded data sources introduce complexity that can strain even well-established marketing programs. In this stage of maturity, performance is no longer driven solely by individual tactics, but by an organization's ability to coordinate efforts, maintain consistency and prove value across an increasingly fragmented ecosystem.

Operational constraints emerge as marketing scales.

As marketing organizations look to mature their operations, complexity increases and execution becomes more difficult.

When asked to select their top operational challenges, marketers cited the following:



Top operational challenges that limit operational maturity

As complexity grows, budget pressure, measurement gaps and wasted spend reinforce one another—making performance harder to sustain.

Top three challenges

Low budgets

40%

say they do not have enough budget to effectively reach the right people on a consistent basis.

Unknown waste

33%

say it's unclear whether emails, ads and other efforts are reaching the right audiences.

Unclear results

32%

say they can't tell what's actually working across channels.

These challenges are closely related. Budget pressure reflects trade-offs between tools and capabilities, while unknown waste and unclear results stem from the same issue: the inability to connect who was reached to what actually worked. As a result, efforts to reduce waste and prove performance remain constrained—making operational maturity harder to achieve at scale.

Despite these challenges, progress in underway

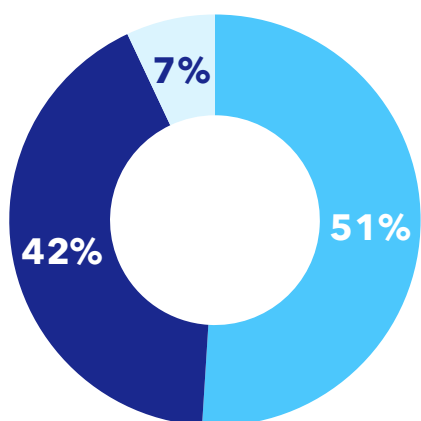
96% of marketers

are taking steps to improve how they reach and engage customers and prospects.

Identity familiarity and adoption remain uneven.

While most marketers are actively working to improve reach and engagement, foundational capabilities that support operational maturity are not yet evenly in place.

Identity resolution is not universally present.



51% say their tech stack uses identity resolution.

42% say their technology stack does not include identity resolution.

7% say they are unsure whether their stack includes identity resolution.

■ Uses identity resolution ■ Does not use ■ Unsure

At a surface level, this suggests identity resolution is becoming the norm. However, adoption alone does not determine impact. The data shows that the way identity is implemented, and how broadly it is applied, matters far more than whether it exists at all.

Familiarity remains a barrier

29% of marketers

say they are not very or not at all familiar with identity resolution.

Operational progress varies by access and understanding

As marketing operations scale, uneven access to core capabilities helps explain why gains in efficiency, visibility and measurement vary across organizations.

Even when identity exists, maturity varies.

Having access to identity resolution does not guarantee consistent application across marketing operations.

Identity is not always deployed broadly.

41%

of marketers who use identity resolution say it is applied to half or fewer of their marketing solutions.

Interest in identity outpaces implementation.

89%

of marketers say they would like to see their organization invest in tools that use identity resolution.

One marketer interviewed for this research illustrated this challenge simply:

"I think we are now to a point where we're trying to decide is it one [identifier] or many as we start to look at how we kind of undo a lot of duct tape that's in place."



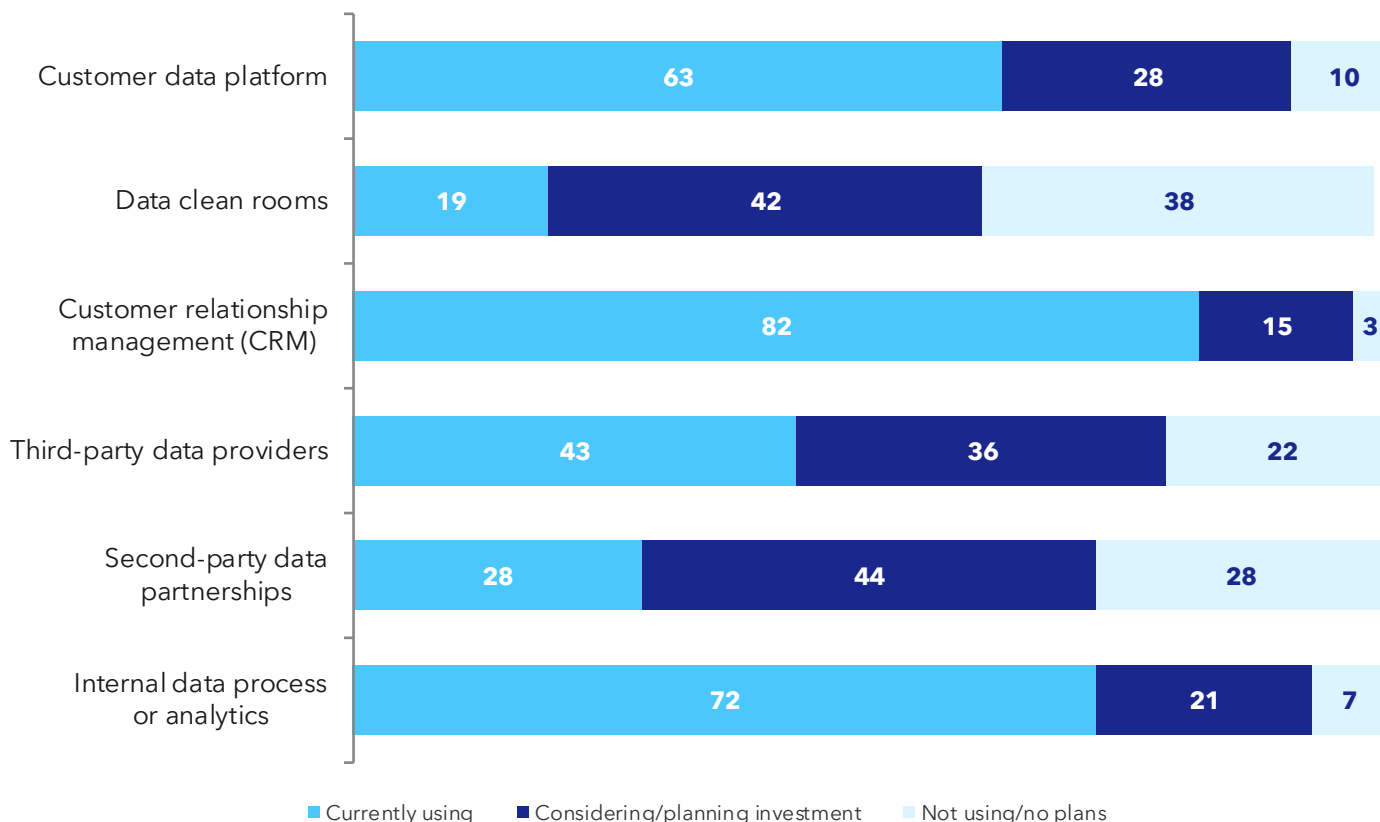
Operational maturity is a spectrum.

These findings reflect a common reality: many organizations are actively working to mature their operations, but uneven deployment limits the downstream benefits identity can deliver, particularly as marketing complexity increases.

The modern data stack is fragmented.

Marketing operations today rely on a combination of platforms, partnerships and internal processes to support reach and measurement.

To provide broader context on how marketers are structuring their data and activation environments, we asked which capabilities they're currently using and considering investment:



Operational maturity depends on alignment, not just adoption

Marketers are leaning towards CDPs, CRMs and internal data processes to establish a data foundation. While these tools are great for organizing current customer data, identity resolution is not always consistently applied across these systems to support cross-channel reach or prospecting at scale. Interestingly, clean rooms have limited adoption, alongside second- and third-party data partners, but probably have the most potential for leveraging and aligning the most information about individual customers and prospects for marketing in a privacy-safe way.

Taken together, these findings reflect the reality most marketers face: operational maturity is shaped by how well diverse systems and data sources are working together—not by the presence of any single capability in isolation.

CORE CONCEPT

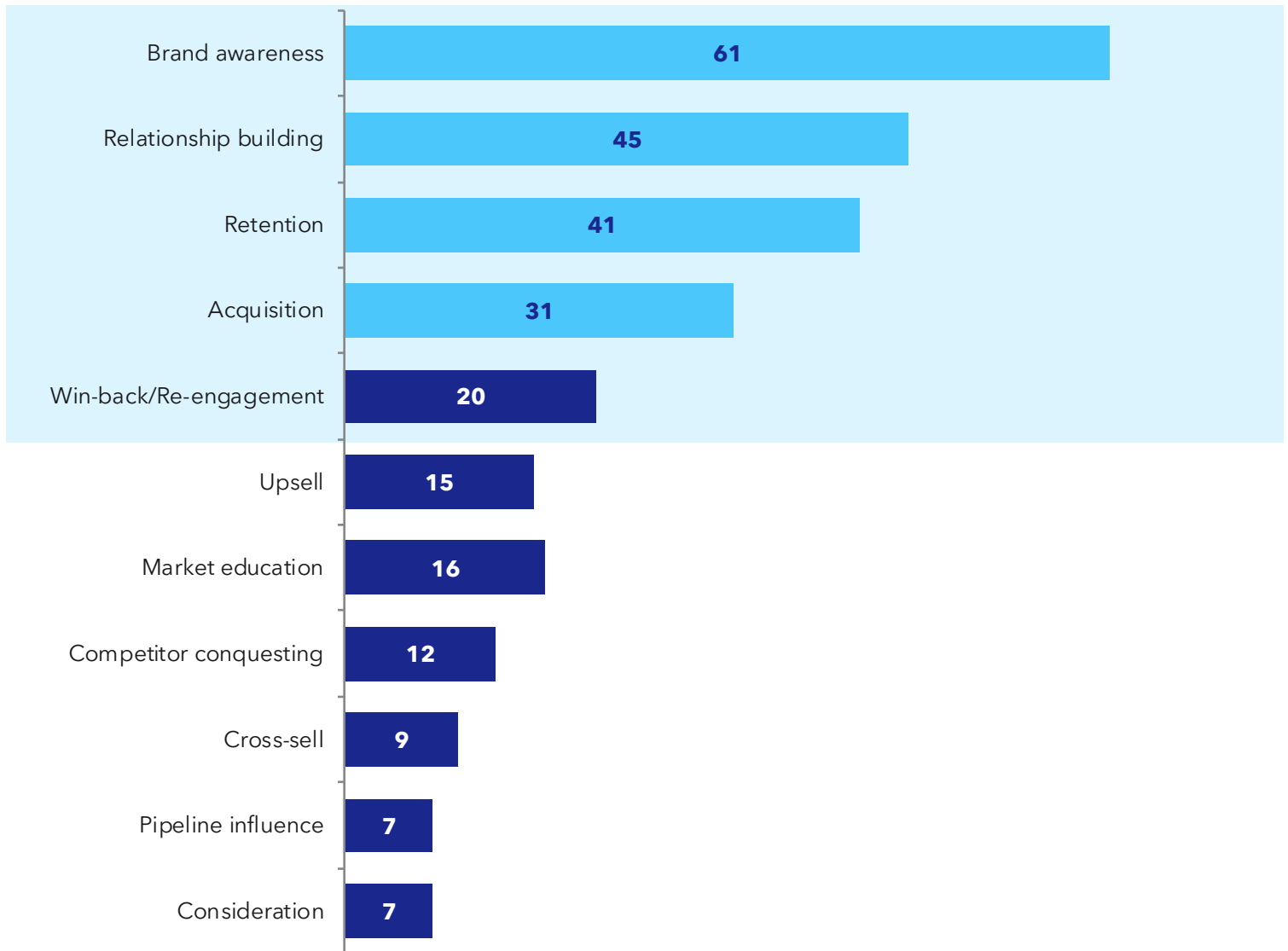
Advanced marketing capabilities and accountability: as expectations rise, confidence becomes harder to sustain

As marketing organizations mature, pressure intensifies. Consumers expect enterprise brands to deliver relevant and personalized messaging across touchpoints. Leadership teams increasingly require proof of performance, clearer attribution and confidence that investments are driving meaningful outcomes. In this environment, effectiveness is no longer defined by simple ad delivery and vague engagement metrics alone. It is defined by the ability to demonstrate impact, explain outcomes and optimize over time. This shift places new pressure on marketing teams to move beyond “good enough” execution toward greater precision and accountability.

What marketing is expected to deliver today

Even as operational maturity remains uneven, expectations continue to rise.

When asked to select up to three primary marketing objectives, marketers most frequently identified the following:



The top priorities reshape what “effective” means.

These objectives reflect a mandate that extends beyond one-off campaign success. Building awareness, sustaining relationships, retaining customers and driving acquisition all depend on the ability to stay relevant over time and maintain continuity across touchpoints as scale increases.

Relevance becomes harder to deliver at scale.

As expectations for marketing performance rise, relevance becomes a critical test of accountability. Reaching the right audience is no longer enough—messages increasingly need to resonate with individual context, intent and timing in mind.

Identity users outperform on relevance.

78%

of marketers using identity resolution say they can very or extremely effectively reach consumers who care about their message.

VS.

38%

of marketers not using identity resolution say the same.

“

If we have homes in Dallas, Texas, somebody who's looking at a rental home in Orlando, Florida doesn't care that we have rental homes in Dallas, Texas.

– Marketer interview

Personalization exposes the limits of “good enough” performance.

As personalization expectations rise, so do the demands on data and measurement. Delivering tailored experiences consistently across channels and over time requires the ability to connect signals and learn from individual interactions.

Identity users outperform on personalization.

68%

of marketers using identity resolution say they can very or extremely effectively deliver personalized campaigns.

39%

of marketers not using identity resolution say the same.

VS.

Personalization breaks down without identity

While basic personalization may be achievable without identity, delivering it consistently and at scale becomes significantly more difficult. These findings suggest that “good enough” approaches quickly reach their limits.



Overall digital campaign effectiveness reflects system-level maturity.

As digital programs expand across channels and formats, campaign effectiveness increasingly reflects how well data, activation and measurement work together.

Identity users report stronger campaign effectiveness.

58%

of marketers using identity resolution say their digital campaigns are very or extremely effective.

VS.

23%

of marketers not using identity resolution report the same level of effectiveness.

Tech maturity and alignment shapes results

These differences suggest that digital campaign effectiveness is less about any single channel or strategy and more about the strength of the systems supporting recognition, activation and measurement.

Measurement and insights separate confidence from uncertainty

As marketing programs grow more complex, confidence increasingly depends on the ability to measure performance clearly and apply insight over time. Without reliable visibility into what works and why, improvement becomes difficult to achieve.

Identity users report stronger measurement and learning

64%

of marketers using identity resolution say they can very or extremely effectively measure performance at an individual level.

VS.

30%

of marketers not using identity resolution report the same.

Learning compounds performance

65%

of marketers using identity resolution say they can effectively capture insights that improve future campaigns.

VS.

28%

of marketers not using identity resolution report the same.

Clear measurement and learning enable marketing to improve over time

Together, these differences point to identity's role beyond execution. When marketers can clearly measure performance and learn from results, confidence carries forward and performance compounds.

Performance gains plateau without deeper integration.

Across these high-end capabilities, identity users consistently outperform non-users. Yet even among marketers using identity resolution, performance rarely approaches universal effectiveness.

This is reflected not only in outcome metrics, but in how identity is utilized operationally.

Among marketers using identity resolution, the most commonly cited challenges point to integration and execution rather than intent:

46%

cite difficulty understanding prospects where they have less information on each individual.

41%

cite challenge using their identity resolution solution to its full potential.

38%

cite trust in their identity resolution solution.



Execution challenges help explain uneven results.

Marketers who use identity resolution were asked to cite the biggest challenges they experience with identity:



The value of identity resolution depends on execution

Four out of ten identity users report challenges fully leveraging their identity investment effectively. These findings help explain why performance gains, while meaningful, often plateau short of their potential.



Taken together, the data underscores a critical distinction: Identity improves performance, but its impact depends on how deeply integrated it is across data, activation and measurement. As expectations rise, partial implementation increasingly limits returns—shaping where marketers must focus next.

Recommendations for marketers





Make identity a foundational layer across the marketing stack.

The findings in this report highlight a consistent pattern: marketers can feel they're effective without identity—until growth, personalization, measurement and optimization demands expose the limits of disconnected systems and partial views of their addressable audience. To move beyond “good enough,” organizations must establish a people-based identity foundation. Without this baseline, marketers are more likely to experience uncertainty, fragmentation and limits to relevance and personalization. For organizations that have identity resolution in place, the opportunity lies in expanding its role. Identity resolution delivers the greatest impact when it is treated as a foundational layer, not a feature embedded in a single platform.

Use clean rooms to extend identity into audience growth.

Throughout the report, performance gaps widen most clearly when marketers move beyond audiences they already know. Reach proves hardest during prospecting and audience expansion. Clean rooms are critical in this moment. While customer data platforms help unify known customers, clean rooms allow marketers to discover and activate unknown and unauthenticated audiences using identity in privacy-safe ways. By extending identity through clean room environments, marketers can move beyond proxy segments toward more precise, person-based prospecting.



Connect identity directly to activation environments.

Performance gaps widen when identity stops at the data layer. To fully realize its value, identity must extend into activation environments where audiences are actually reached. Marketers should prioritize platforms and partners that allow identity to flow seamlessly into channels such as programmatic display, CTV and other addressable media. When identity underpins activation, relevance and personalization become easier to deliver consistently regardless of channel or format.

Use identity to unify measurement, learning and optimization.

Another advantage of identity is clarity. As the research shows, marketers using identity are far more confident in their ability to track performance and automate learnings over time. To gain a clearer understanding of what worked, why it worked and how to improve future performance, marketers should look to identity resolution to serve as the link between activation, engagement and measurement. Without this connective layer, uncertainty persists, which limits learning and optimization.



Epsilon capabilities help brands market smarter.

Data & identity

Connect people, channels and outcomes at scale by activating data and identity –the essentials of modern marketing.

Customer data platform

Unify, expand and enrich your first-party data to understand people clearly and activate across channels with privacy built in.

Loyalty

Design and evolve programs backed by activation expertise to deepen engagement and drive measurable growth.

Clean room

More than an empty container–enrich first-party data, uncover deeper insight, activate with confidence and measure impact from day one.

Digital media

Gain the clarity and control to reach real people, reduce waste and drive stronger performance across every channel.

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