

**KNOWLEDGE CENTER**

**MATT**

Marketing Attribution Think Tank



# State of Performance

Annual Marketer Survey

July 2025

**MMA**  
Marketing + Media Alliance

**Adobe**



# Agenda for today: Understanding today's performance marketing: Where it stands, how it works, what it needs

**01 State of Performance**  
Performance dominates the budget—but not the strategy.

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**02 Performance in Action**  
Performance marketing is increasingly data-driven and outcomes focused, but complexity and fragmented measurement are holding it back from realizing its full potential.

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**03 Improving the Capability**  
To unlock performance at scale, marketers must move faster on content, smarter on measurement, and deeper on tech and talent integration.

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## State of performance - Firmographics

- 400 Marketers
- \$100M+
- Sector representation: Retail, consumer packaged goods, healthcare, financial services, media and entertainment, travel, automotive, telecommunications, durables

48% NOAM

33% EMEA

19% JAPAC

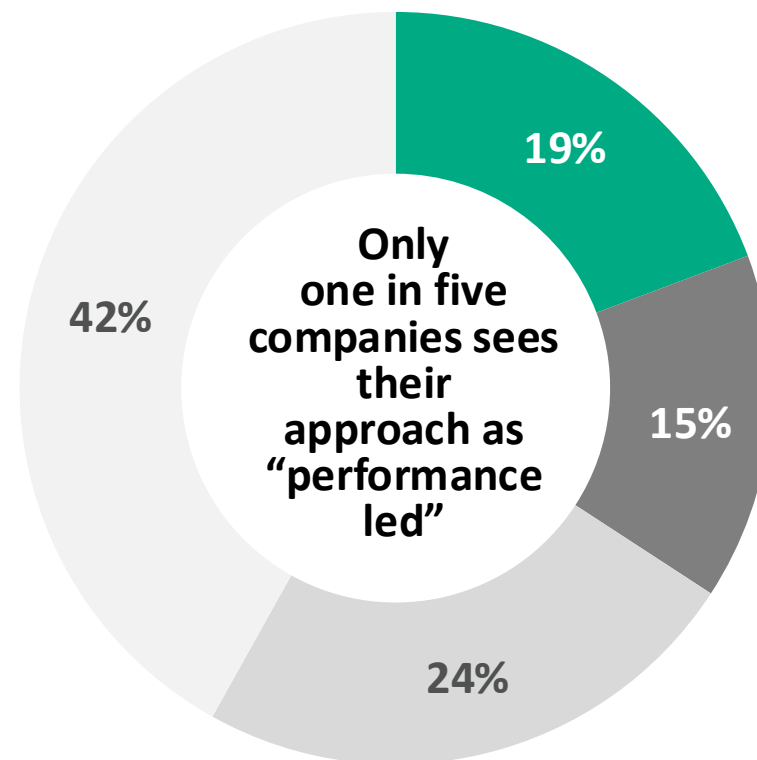
# 01

## State of Performance Marketing

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Performance Paradox:

The majority of spend goes to performance marketing, yet, most marketers don't think their approach is "performance-led"



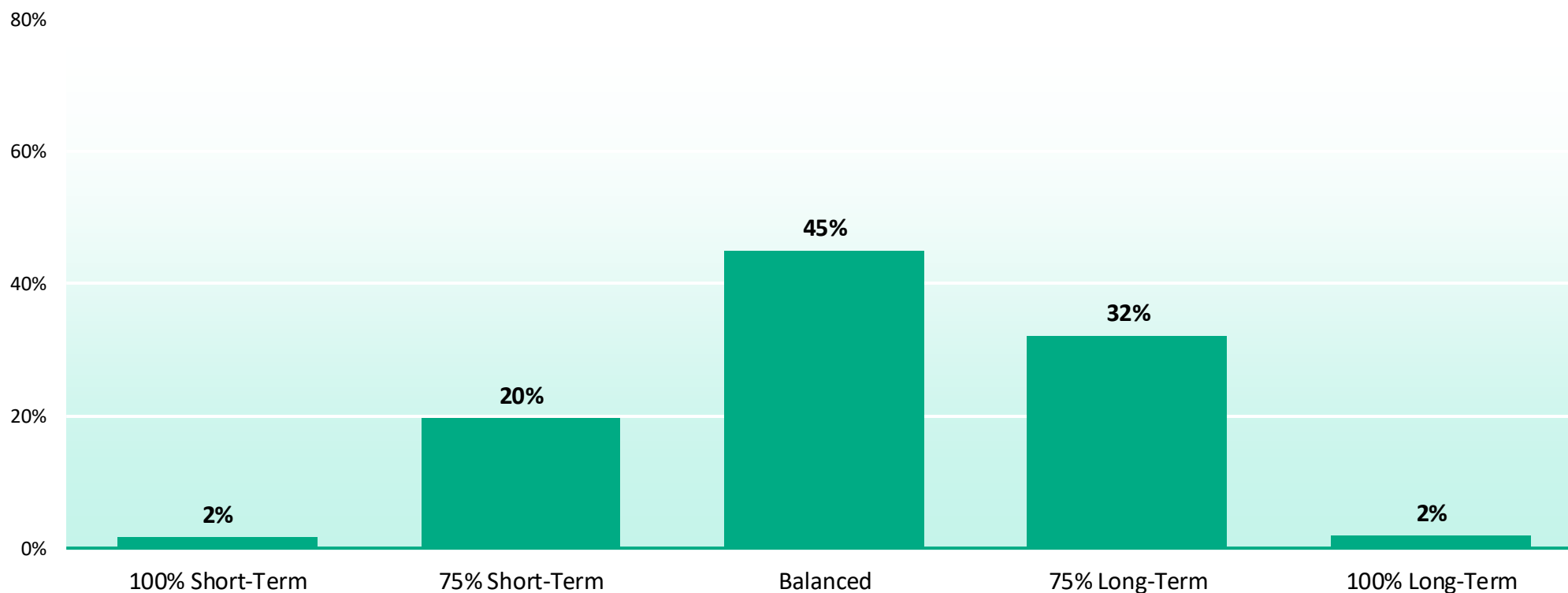
■ Performance-led ■ Brand-led ■ Customer experience (CX)-driven ■ Balanced/hybrid

Q. How would you describe your organization's overall marketing approach? (Select one)  
 Q. What percentage of your total marketing budget is allocated to performance marketing?  
 N=389 Global Senior Marketers

Planning Horizon

# Most companies aim for a balanced or long-term approach to planning

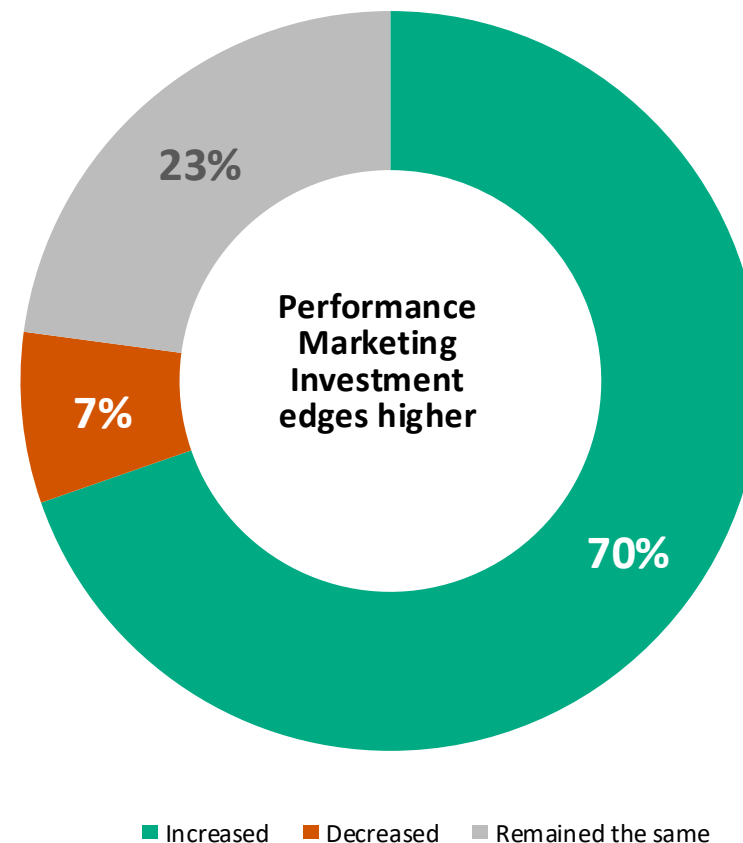
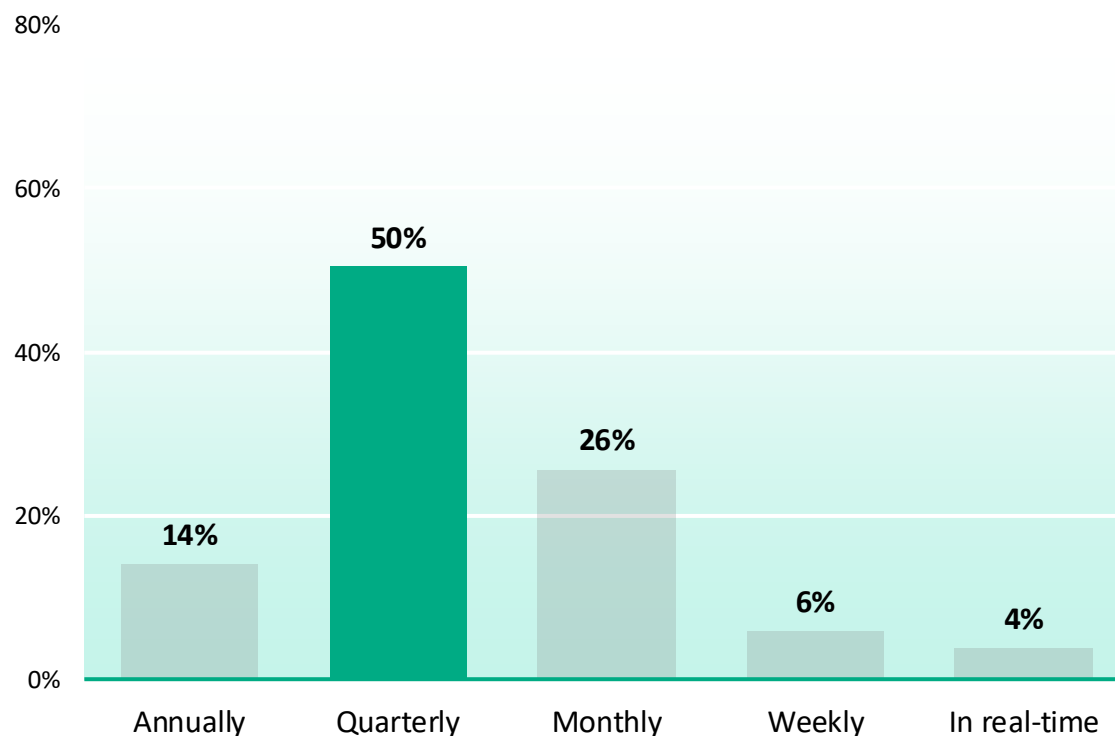
Organization's Focus Between Short-term Activation and Long-Term Customer Growth



## Budget Shifts

As most marketers rely on regular reviews to optimize their spend, investment in performance continues to trend up.

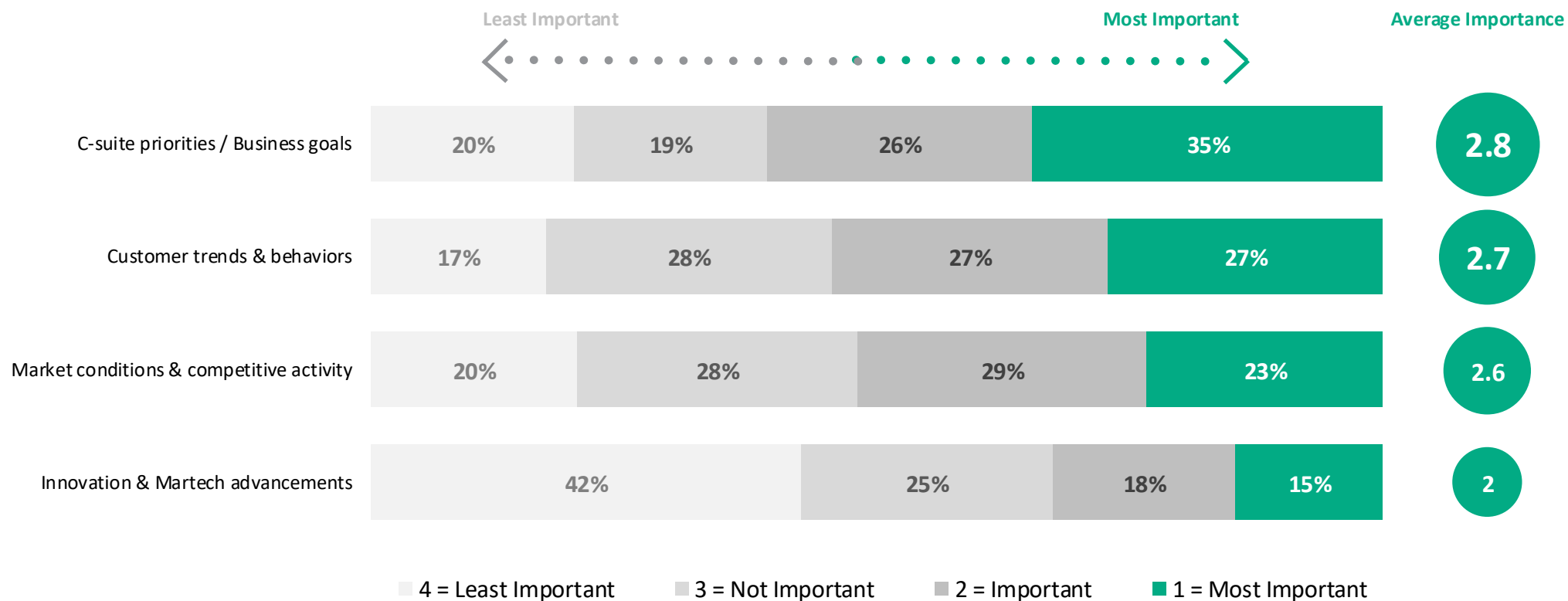
Budget Allocation Shifts on a Quarterly Basis



Q. How frequently do you shift budget allocations based on performance data? (Select one)  
 Q. Over the past 12 months, has your investment in performance marketing increased, decreased, or remained the same? (Select one)  
 N=389 Global Senior Marketers

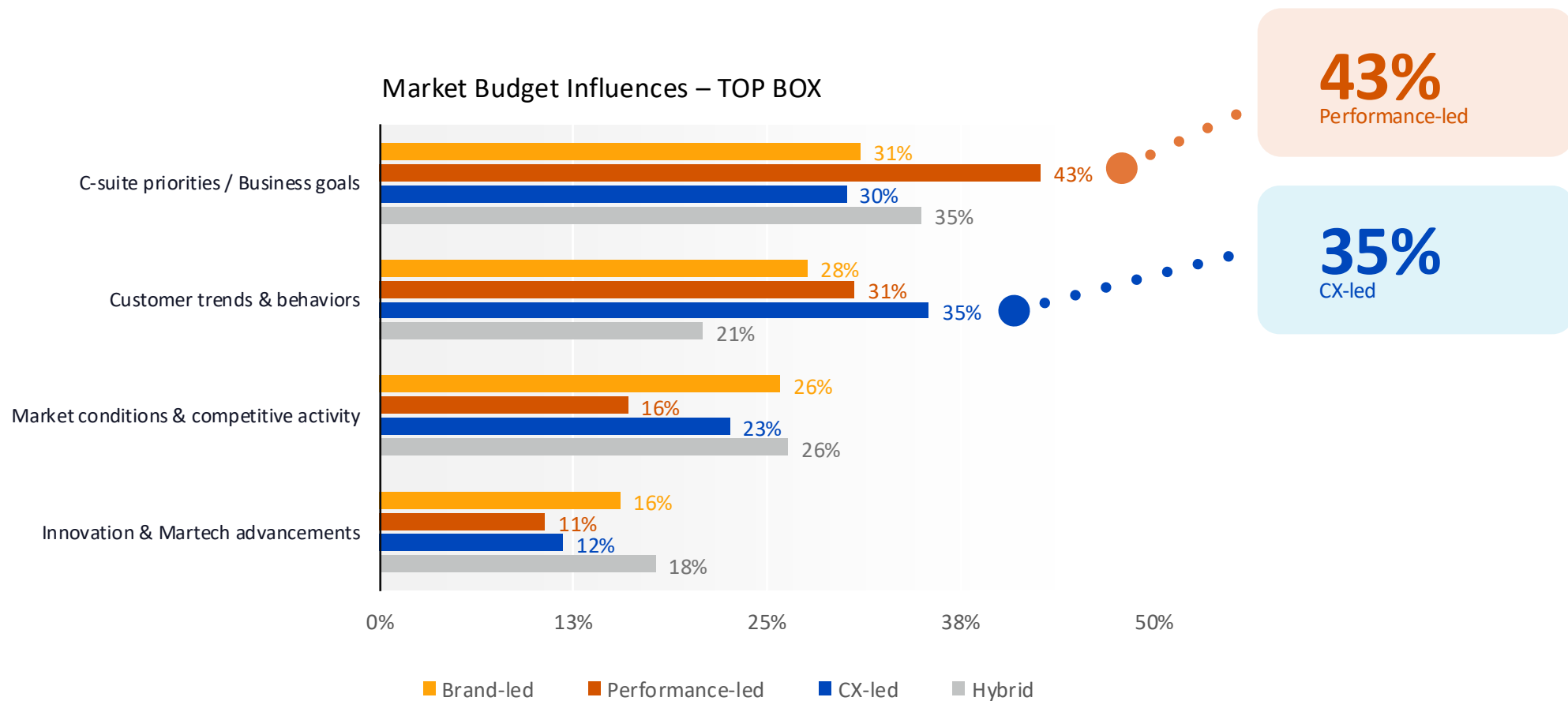
## Budget Decisions

# Top-down priorities & customer trends are key factors behind budget allocation decision



Q. What factors most influence your marketing budget decisions and allocation? (Rank in order of importance) (Each row needs a response)  
N=389 Global Senior Marketers

# Performance-led companies are mostly influenced by C-suite, while CX-led companies by customer trends



Q. What factors most influence your marketing budget decisions and allocation? (Rank in order of importance) (Each row needs a response) – TOP BOX  
 Brand-Led = 58 Global Senior Marketers  
 Performance-Led = 75 Global Senior Marketers  
 CX=Driven = 93 Global Senior Marketers  
 Hybrid = 163 Global Senior Marketers

## State of Performance: Areas of tension

1. The majority of spend goes to performance marketing, but most marketers don't own their approach as "performance-led".
2. Most companies aim for a balanced or long-term approach to planning, but rely on quarterly reviews and reallocate spend to satisfy C-level priorities and consumer trends

# 02

## Performance in Action

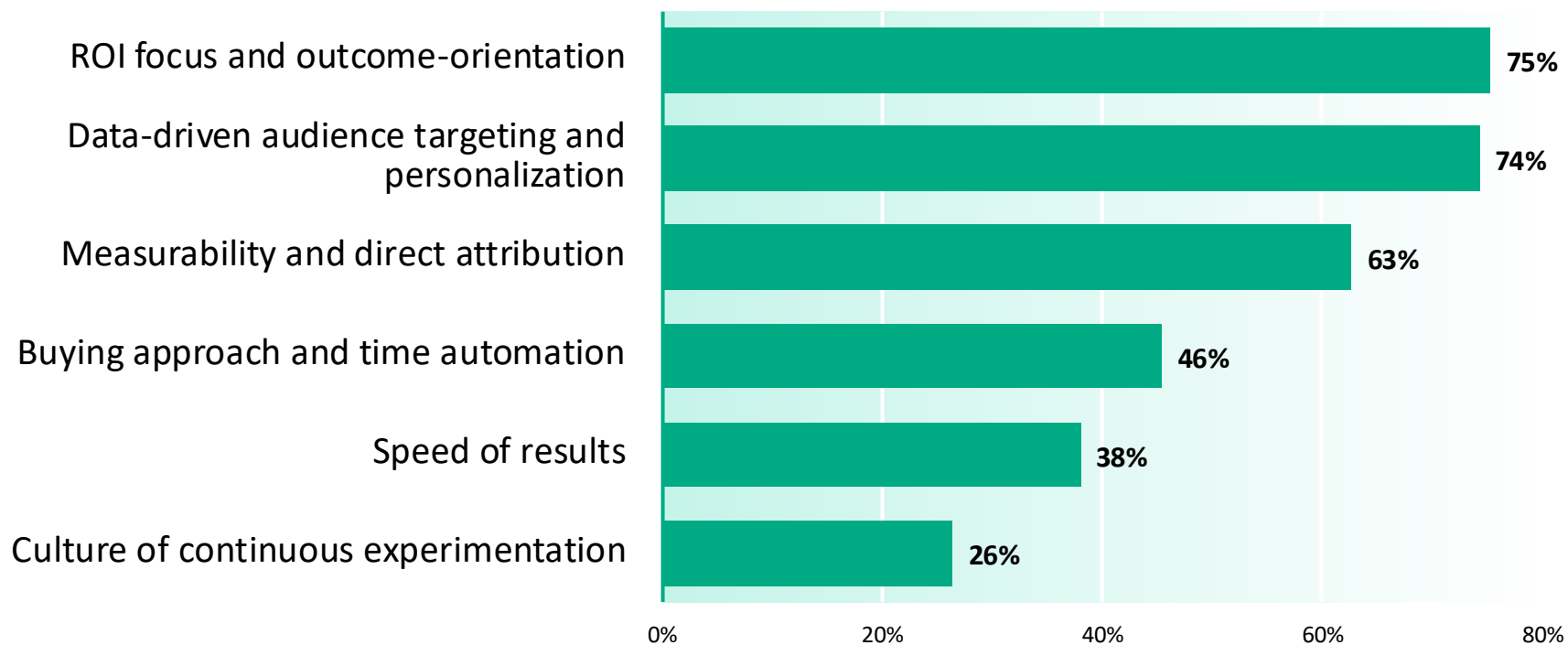
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How Performance is defined  
Time to Market  
Role of Audience targeting  
MarTech Complexity & effectiveness  
How Performance is assessed

How Performance is defined

**Performance = outcome orientation + data-driven approach**

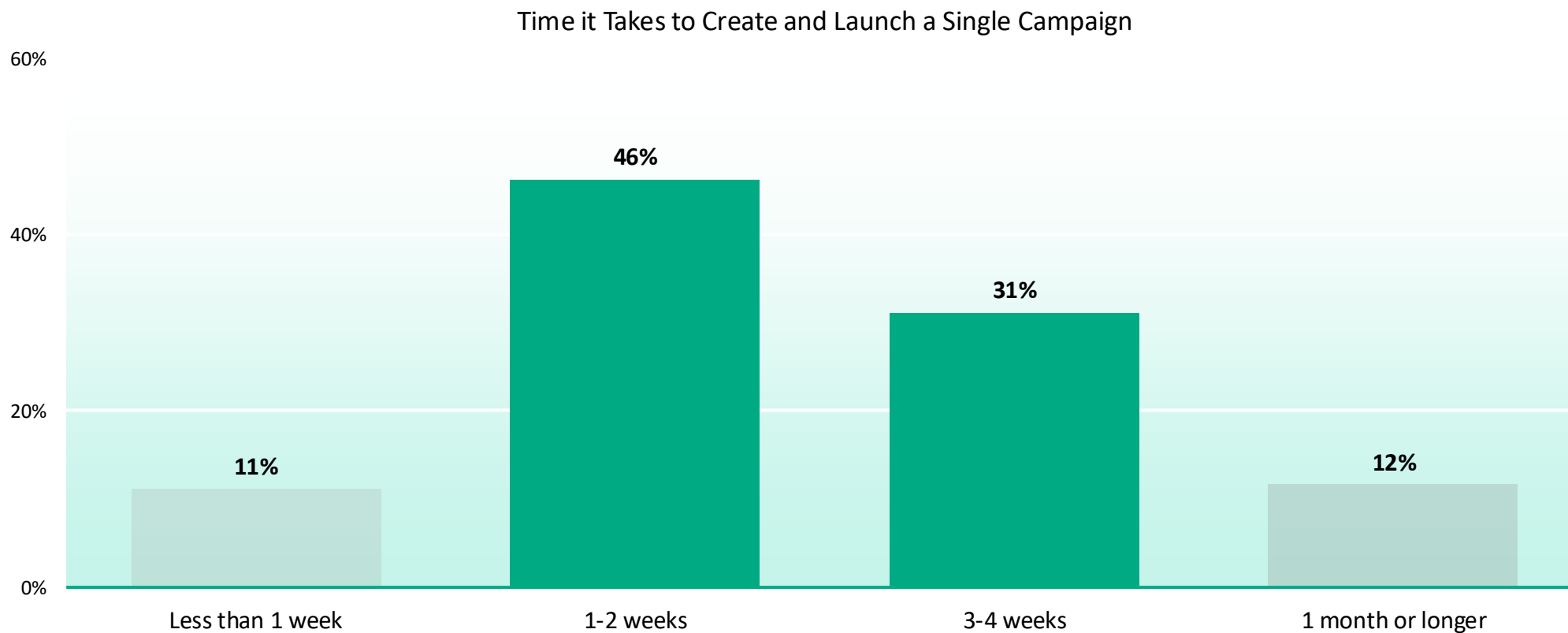
What defines Performance Marketing



Q. Which of the following elements are more important in the way that your company defines performance marketing? (Select all that apply)  
 N=389 Global Senior Marketers

Time to Market

# Marketers claim they need less than a month to launch a new campaign



Q. How long on average does it take for your team to create and launch a single campaign? (Select one)  
N=389 Global Senior Marketers

Performance and Audience targeting

# Performance-led companies are more data driven overall when it comes to targeting

4 methods on average

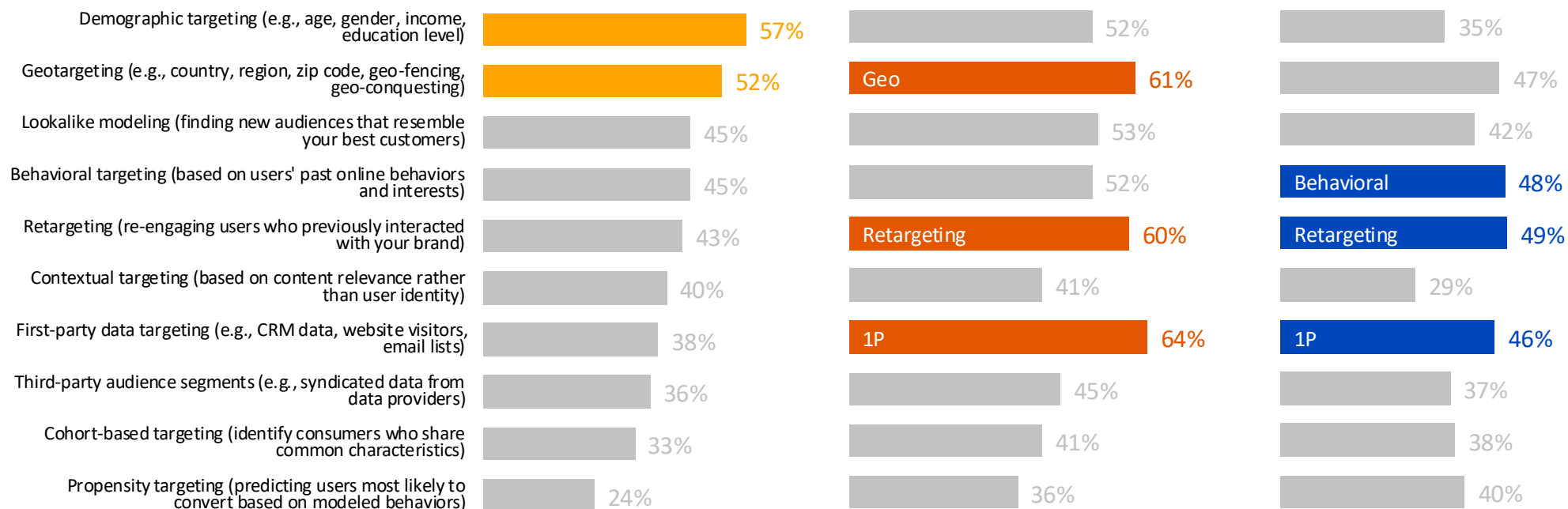
5 methods on average

4 methods on average

Brand-led

Performance-led

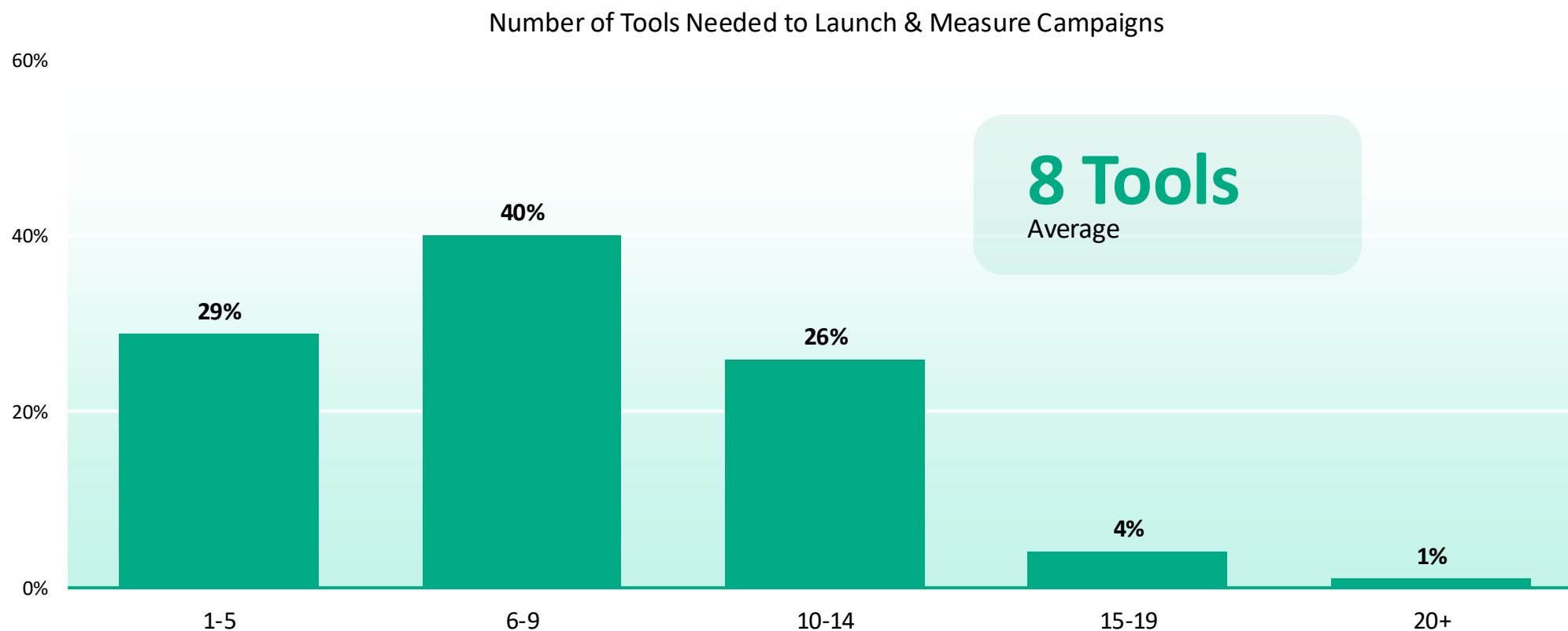
CX Driven



Q. Which audience targeting approaches do you currently use for your performance marketing initiatives? (Select all that apply)  
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## MarTech Complexity

# Companies rely on multiple tools for performance marketing

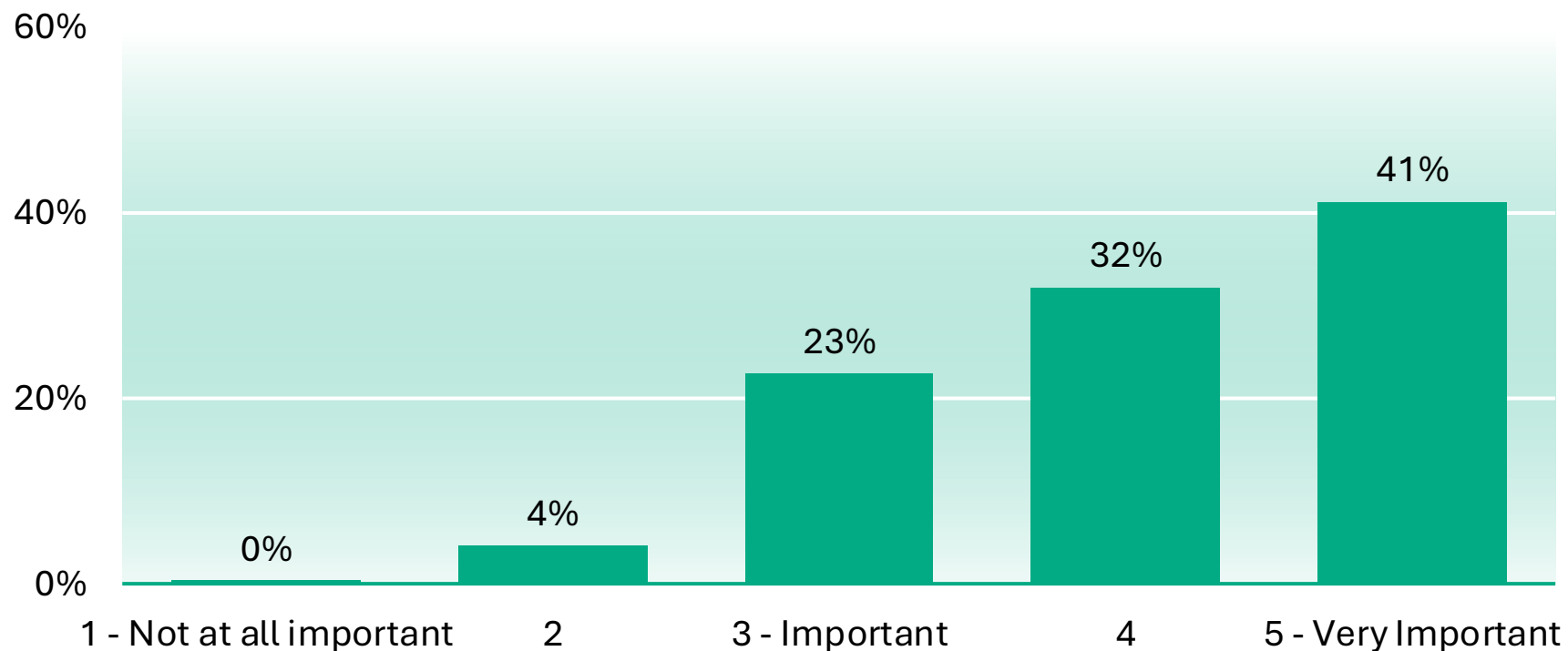


Q. How many different systems, platforms, or tools do you believe it takes to launch and measure a campaign?  
N=389 Global Senior Marketers

## MarTech Effectiveness

# Marketers feel they can improve their martech effectiveness with better integration

### Importance of Consolidating Performance Marketing Tools



Q. How would you rate your MarTech stack's effectiveness in delivering on performance marketing goals?

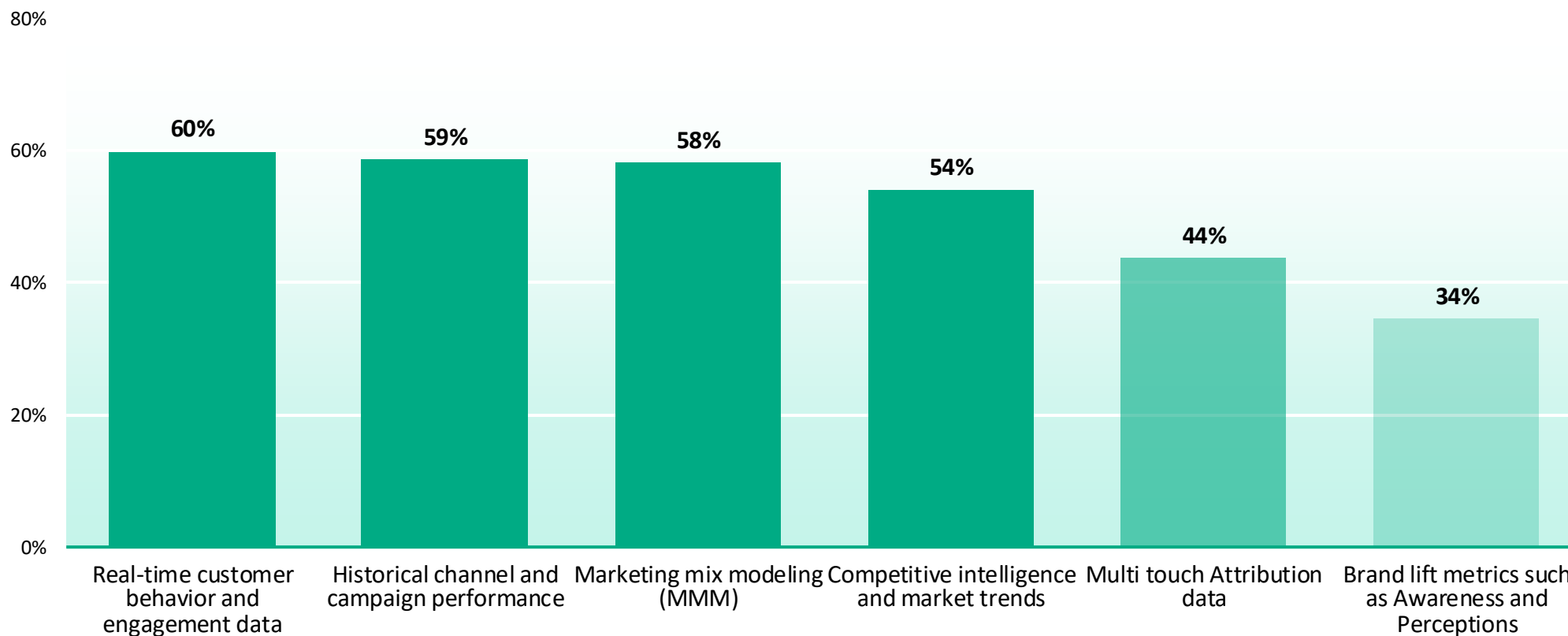
Q. How important is it for your organization to consolidate the tools used for performance marketing?

N=389 Global Senior Marketers

Measurement and data challenges

# Companies need to bridge the gap between slow-moving planning tools (MMM) and real time (but directional) data

Data Sources that Drive Budget Allocations



## Performance in action:

1. Designing for outcomes but dealing with complexity and speed
2. 4+ targeting methods and 8 tools, and one month to launch
3. Speed of insights is a key challenge: how to bridge the gap between slow-moving planning tools (MMM) and real time (but directional) data?

# 03

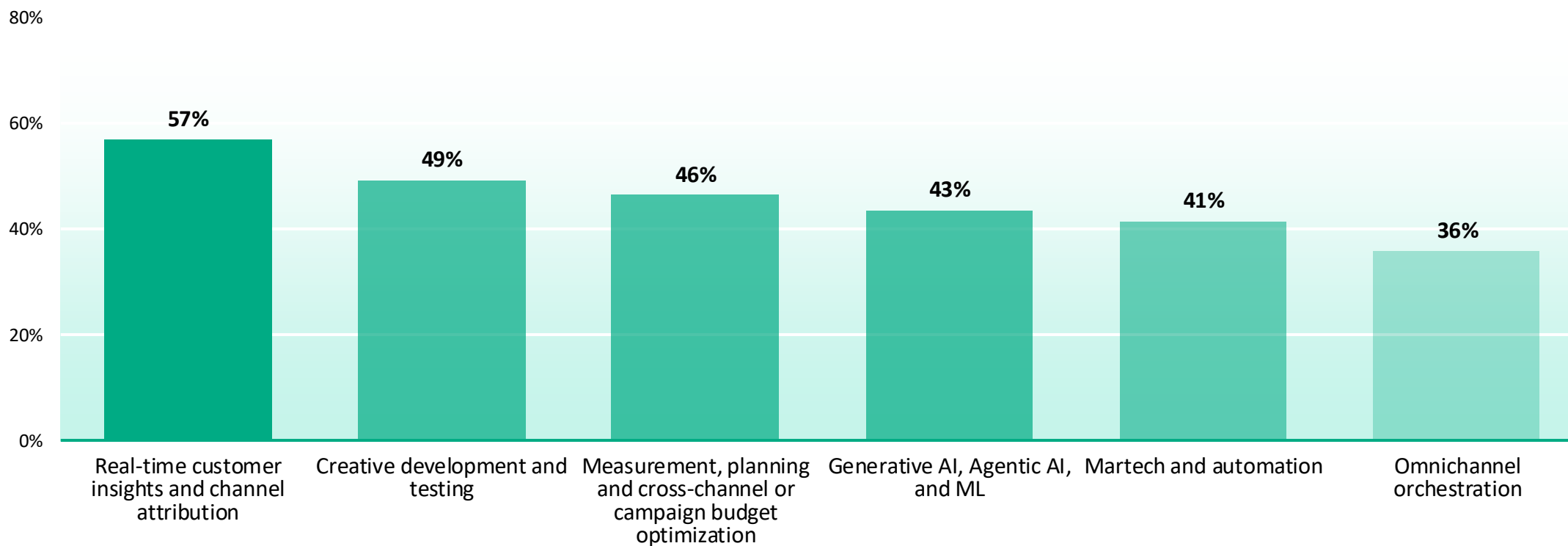
## Improving the Capability

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Critical Capabilities for Performance Success

# Real time insights and creative development are seen as key capabilities for performance success

Critical Capabilities for Successful Performance Marketing

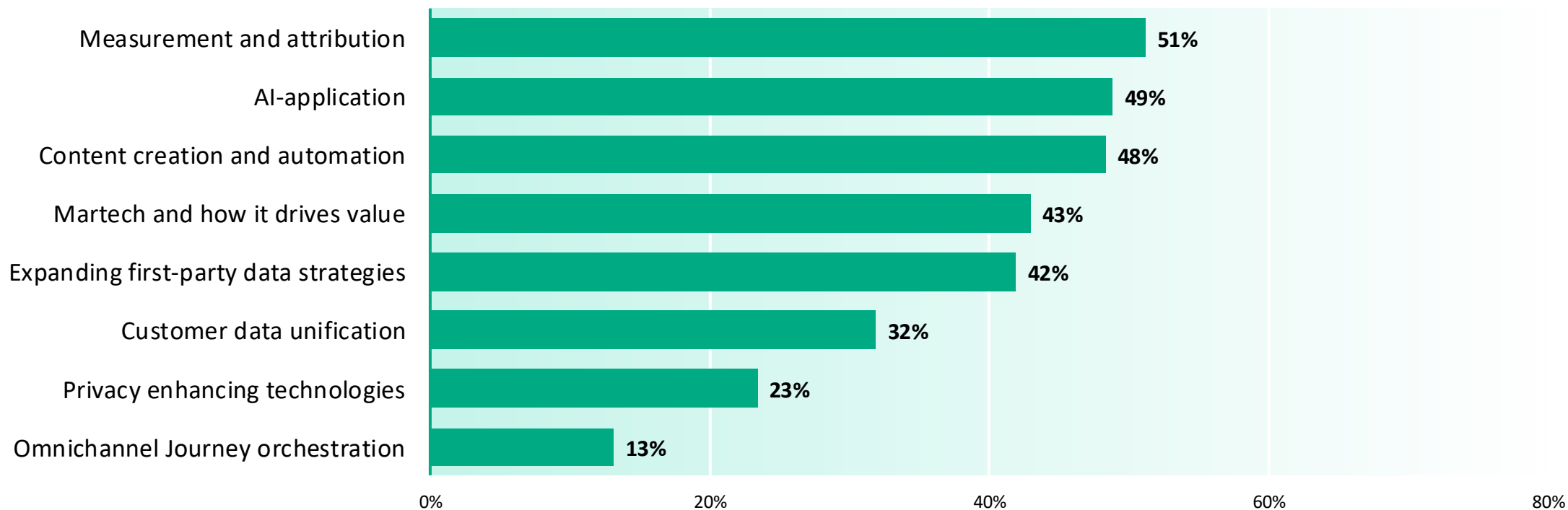


Q. What capabilities are most critical for performance marketing success today? (Select up to 3)  
 N=389 Global Senior Marketers

Areas of Future Investment

# Measurement and attribution, AI and content automation is where marketers are investing

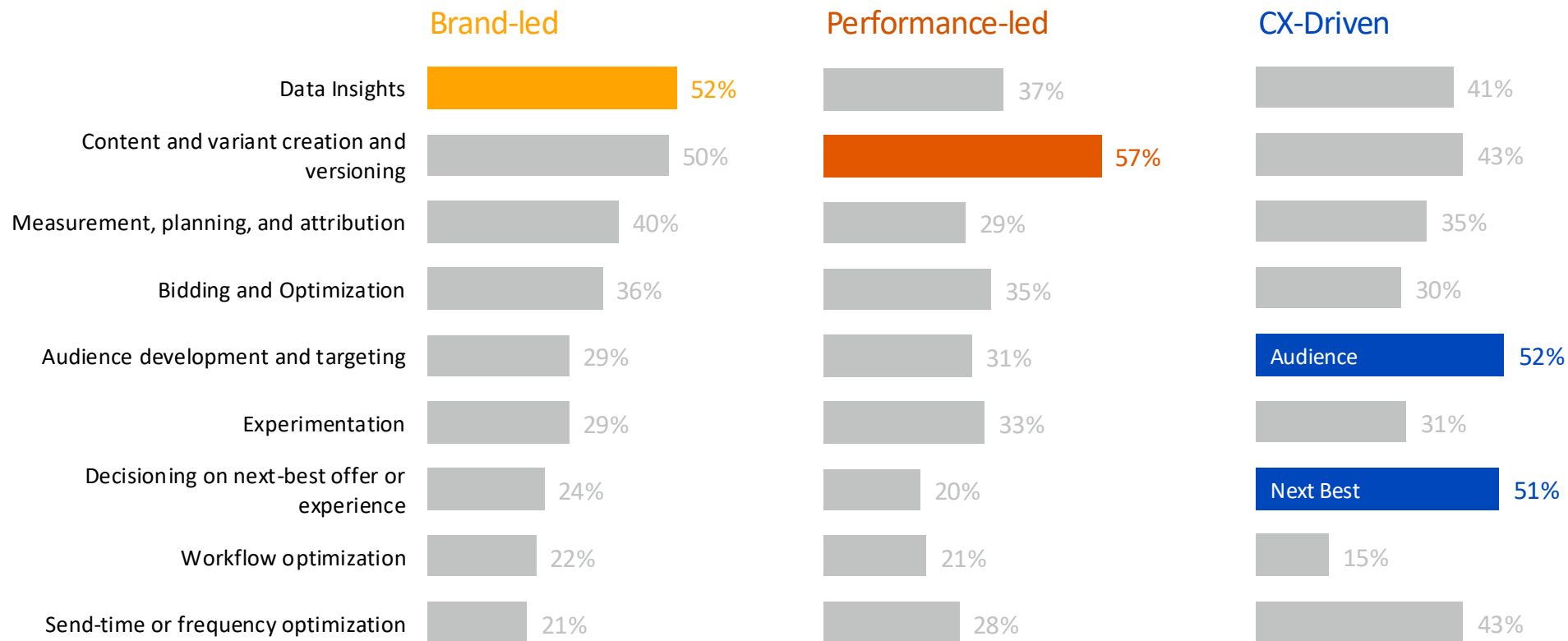
Primary Investments: Next 12 Months



Q. What are the primary areas you plan to invest in over the next 12 months? (Select all that apply)  
 N=389 Global Senior Marketers

AI Adoption

# Brand-led use AI for insights, performance-led for versioning, CX for audience & next best action.



Q. In which of the following areas of performance marketing have you successfully applied AI to improve the process? (Select all that apply)  
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## Improving the capability

1. Closing the gap between creative development and insights is seen as key for performance success
2. Measurement and attribution, AI and content automation is where marketers are investing
3. How each org approaches AI varies: Brand-led use it for insights, performance-led for versioning, CX for audience & next best action.



# Strategic Implications: 4 key questions

- 01** Can Performance marketing evolve from a budget-heavy, short-term practice into a strategy-led discipline that drives long-term growth?
- 02** Can creative agility and content velocity be embraced as core performance levers?
- 03** Can Measurement capabilities keep pace with execution?
- 04** How do we unlock the full potential of martech and AI?