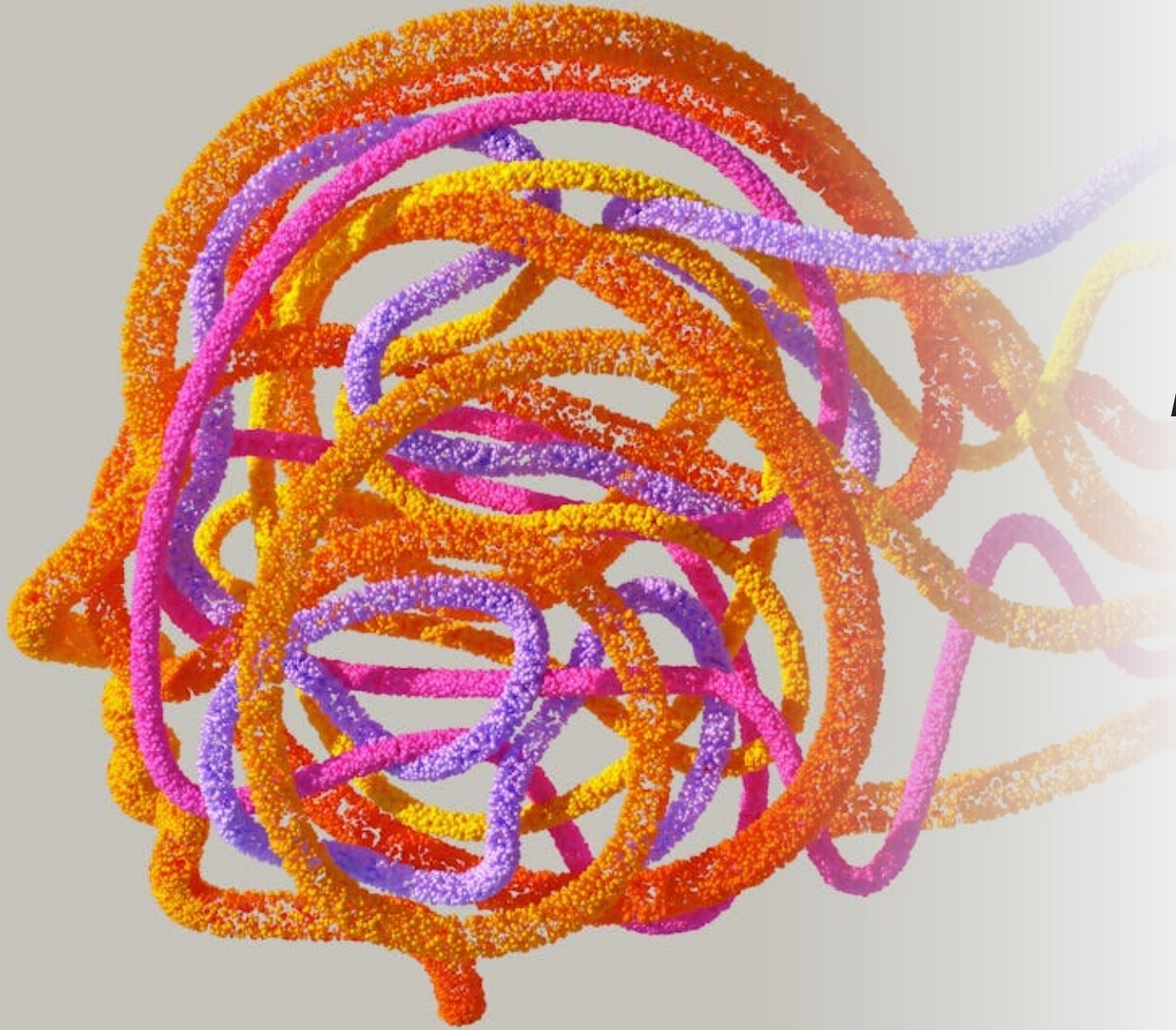




***Delivering Performance
in the Era of AI:***
**Technology, Data and New
Opportunities to
Unlock Omnichannel Success**

A White Paper
June 2026

Acknowledgements & Notice

This research would not have been possible without the significant contributions of hundreds of U.S. advertising, marketing and media industry leaders who generously offered their time, insights and feedback in support of this effort.

In particular, Winterberry Group is grateful to the sponsors of this paper for their generous support:

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Introduction: AI Is Presenting New Opportunity to Orchestrate “Omnichannel Performance”

As in so many other respects, AI is disrupting how **marketing is done**—upending the impact of certain paid media, introducing a torrent of synthetic content and, simultaneously, supercharging brands’ efforts to streamline processes, test creative treatments and optimize the allocation of precious budgets.

But where does it go from here? And how should marketers be thinking about leveraging AI as they move to advance the concrete, performance-oriented aims—customer acquisition, incremental sales, retail traffic—that are increasingly core to their mission?

For many years, we’ve been tracking the evolution of those trends, with a simple aim: **help brands engage the resources and strategies needed to build true “next generation” performance marketing capability** (and optimize the contribution of channels, like direct mail, that play foundational but at times disconnected roles in those efforts). This year, we sought to understand how AI is shifting that playing field, presenting opportunity and obstacles for brands to address in the years ahead.

This report presents the findings of that effort, as cultivated via an extensive primary research effort (including a survey of more than 250 U.S. marketers leveraging a range of paid and owned channels).

What it will show: Marketers and their supply chain partners have made substantial strides to advance their deployment of AI and similar technology in the service of performance-oriented use cases, building upon first-generation priorities—largely focused on driving efficiencies through the automation of costly, manual campaign workflows—to focus on optimizing their valuable audience data resources. But much work remains to be done if they are to capitalize on AI’s truly transformative potential contribution: helping orchestrate campaigns seamlessly across a range of marketing media, unlocking the true power of “omnichannel performance.”

“[AI] is upending the impact of certain paid media, introducing a torrent of synthetic content and, simultaneously, supercharging brands’ efforts to streamline processes, test creative treatments and optimize the allocation of precious budgets”



Key Findings: Brands Rapidly Evolve Use of AI to Support Performance Marketing; Data Use Cases Are Central Among Current Priorities



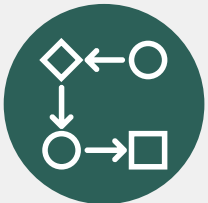
Brands are continuing to emphasize and shift resources to performance-oriented marketing efforts

- 71% of panelists reported that their organizations have placed greater emphasis on **performance-oriented marketing** over the past three years (with only 2% reporting a decrease in such priority)
- The shift appears to be universal across major marketer verticals, including financial services, retail, B2B technology, healthcare and CPG



The performance media mix includes a growing array of digital and traditional touchpoints, though a “core four” of online display, paid social, direct mail and paid search continue to predominate marketer efforts

- Four channels continue to rank highest among those cited by brands as most important to their performance marketing efforts—including online display advertising (ranked among top three channels by 57% of panelists), paid social (54%), direct mail (45%) and paid search (45%)
- The reported importance of each of those channels dipped slightly relative 2024 feedback, likely due in large part to a growing role for retail/commerce media—which 37% of panelists said now represents a key performance channel (up from 27% in 2024)
- 83% of panelists said they plan to grow their 2026 direct mail budgets (relative to 2025 levels), responding primarily to heightened demand to support the “performance” aims of customer acquisition, incremental sales and retail traffic generation



As AI disrupts their ability to attract and engage digital audiences, brands are vesting renewed importance in high-impact, real-world content and experiences

- Marketers appear to be responding to AI-driven disruption in search, social media and content discovery by placing greater value on channels that deliver tangible, credible forms of engagement
- Direct mail is a core vehicle now being deployed to address that need. When deployed alongside digital media, panelists reported that it best complements paid social (50%), online display (50%) and paid search (43%)—again reinforcing a likely enduring role for those central performance touchpoints

Key Findings: Brands Rapidly Evolve Use of AI to Support Performance Marketing; Data Use Cases Central Among Current Priorities (cont'd)



Marketers have advanced steadily up the maturity curve in their efforts to deploy AI in support of performance-oriented applications; data-oriented use cases now command central attention and investment

- Similar majorities of marketers said they leveraged AI to generate clear *effectiveness* gains (reported by 63% of panelists) and heightened campaign *efficiencies* (62%) over the past year
- Nearly 96% of panelists said they've used AI tools to support their deployment of direct mail programs, with 93% characterizing those efforts as delivering "moderate" or better value—primarily in support of improved targeting accuracy (cited by 43% of panelists) and improved ROI (42%)
- Data-oriented use cases were cited as the most common focus of AI deployment by direct mail marketers, with "audience segmentation and predictive targeting" (cited by 52% of panelists) named most often



The challenge ahead: leverage AI as a vehicle to support orchestration of true "omnichannel" marketing programs, capitalizing on data and addressable media to optimize business outcomes and deliver better consumer experiences

- Marketers are highly optimistic about AI's potential to drive performance marketing gains over the coming two years; 70% of panelists said they expect clear *effectiveness* gains over that time, 58% expect *efficiency* gains and smaller majorities expect to generate better insight into the value of individual channels and develop better methods for segmenting/engaging audiences
- Nearly 89% of panelists said they expect to expand their deployment of AI in support of direct mail, concentrating their efforts on content personalization and the optimization of response rates
- No single issue appears to represent a principal obstacle to AI's continued evolution, though marketers registered modest concern about the challenges of integrating AI with existing systems/workflows (reported by 38% of panelists) and high implementation costs (36%)

Background & Methodology: This Research Examines How Brands Are Leveraging AI to Drive Performance Across a Diverse Mix of Channels

What is this report?

What does this research aim to accomplish?

How was this research collected?

- An analysis of **how U.S. marketers are leveraging (and plan to leverage) artificial intelligence—AI—to support their performance-oriented marketing efforts**, with particular focus on applications supporting the deployment of “omnichannel” programs that incorporate various paid and owned channels
- The third in the *Delivering Performance* research series[^], developed by Winterberry Group and this year sponsored by the United States Postal Service and NaviStone
- Help brands understand more about the **resources and strategies needed to build true “next generation” performance marketing capability**—and optimize the contribution of certain channels, like direct mail, that play foundational (but sometimes disconnected) roles in those efforts
- Identify and benchmark the current state of AI adoption across performance marketing use cases
- Identify where AI is creating value across paid and owned channels
- Via an **original online survey of 251 U.S. marketers and media professionals*** responsible for the activation of marketing programs incorporating multiple paid and owned channels (including direct mail), supplemented by dozens of qualitative thought leader interviews with executives representing U.S. marketer brands, agencies, data and specialty service providers, technology platforms and other stakeholders (with both conducted in March and April 2026)
- Respondents addressed their organization’s strategic perspectives on AI, performance marketing priorities, channel orchestration practices and direct mail-specific AI applications; certain results have been aggregated for presentation purposes

Notes: [^]In certain cases, data from the 2024 Delivering Performance research is presented for comparison purposes

**Detail on the composition of the marketer panel is presented in the appendix*

A background image showing three hands of different skin tones holding up three identical gray rectangular blocks. The hands are positioned at the bottom left, bottom center, and middle right of the frame. The blocks are arranged in a slightly staggered, ascending line from left to right.

Brands are continuing to emphasize and shift resources to performance-oriented marketing efforts.

“Half the money I spend on advertising is wasted; the trouble is I don’t know which half.”

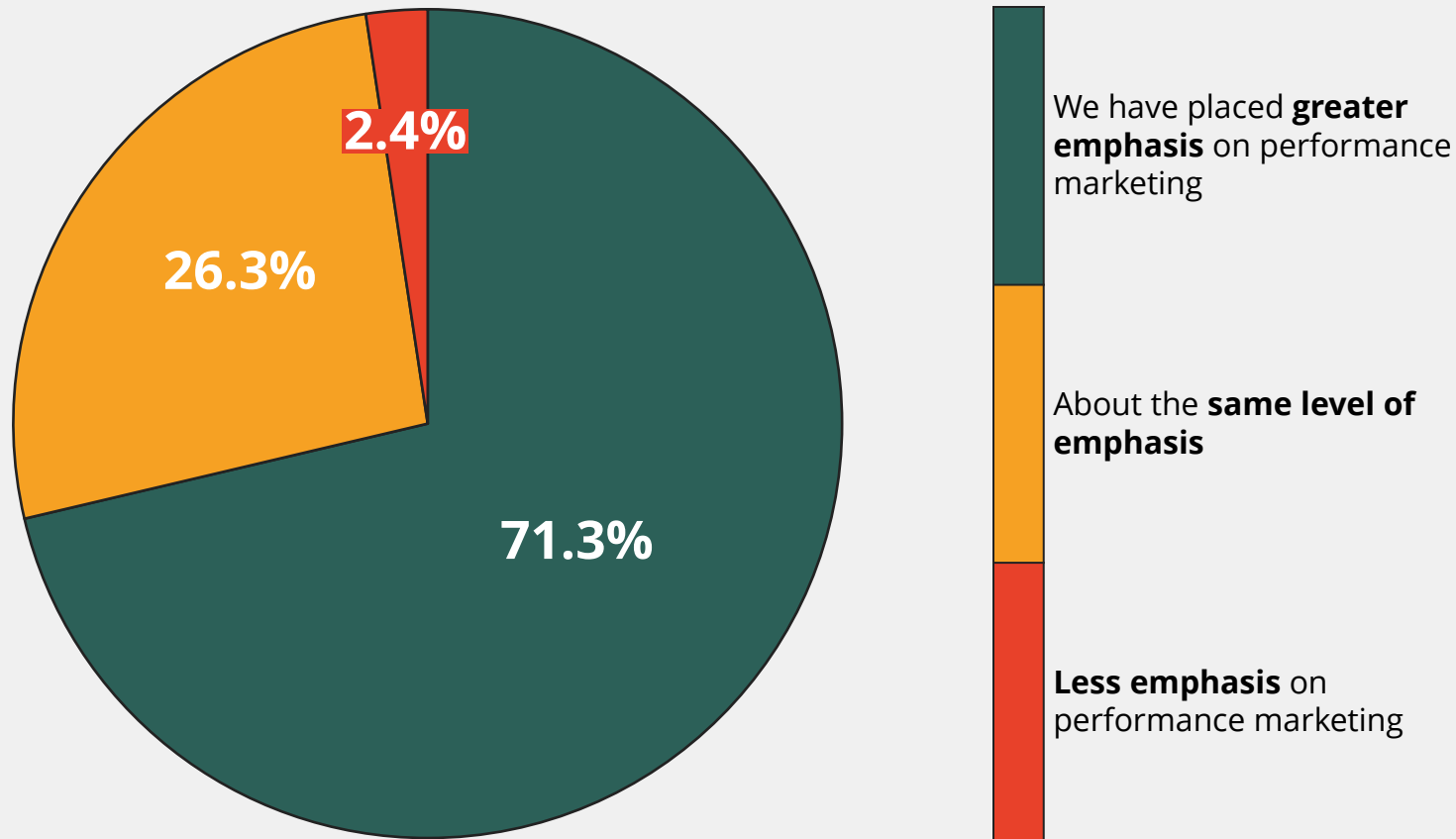
It’s a maxim nearly as old as the practice of marketing itself, most often attributed to the pioneering 19th century merchant John Wanamaker. And it speaks to a challenge that’s vexed virtually every marketing professional, from those early days up to today: *How to demonstrate marketing’s contribution to real-world business objectives?*

Today’s marketers face an even broader array of obstacles: Higher standards of corporate accountability. The proliferation of platforms that purport to solve for the thorny challenges associated audience building, media deployment and attribution (but don’t always deliver on those promises). And, not incidentally, consumer attention that’s rapidly fragmenting across an array of channels, diminishing the role and practical impact of any “mass media.”

Fortunately, the media and expertise available today have advanced significantly from those that might have been familiar during Wanamaker’s time. And brands are increasingly leaning into them, primarily by moving to prioritize “performance” strategies and campaigns: those that support clear, incremental outcomes—new customer acquisition, direct sales revenue, retail traffic generation, etc.—that can be measured and optimized over time.

Nearly Three-Quarters of Marketers Have Increased Their Emphasis on Performance-Oriented Strategies Over the Past Three Years

How has your organization's emphasis on performance-oriented marketing changed over the past three years?
(% of respondents, single select)



"Shifting marketing budget from a scattergun approach to results-driven, efficient targeting can directly improve ROI and reduce customer acquisition costs"

—C-Level Executive, Travel/Hospitality

The performance media mix includes a growing array of digital and traditional touchpoints, though a “core four” of online display, paid social, direct mail and paid search continue to predominate.



Technology, data and media innovations are dissolving the strict distinctions that traditionally defined “awareness” and “performance” oriented media.

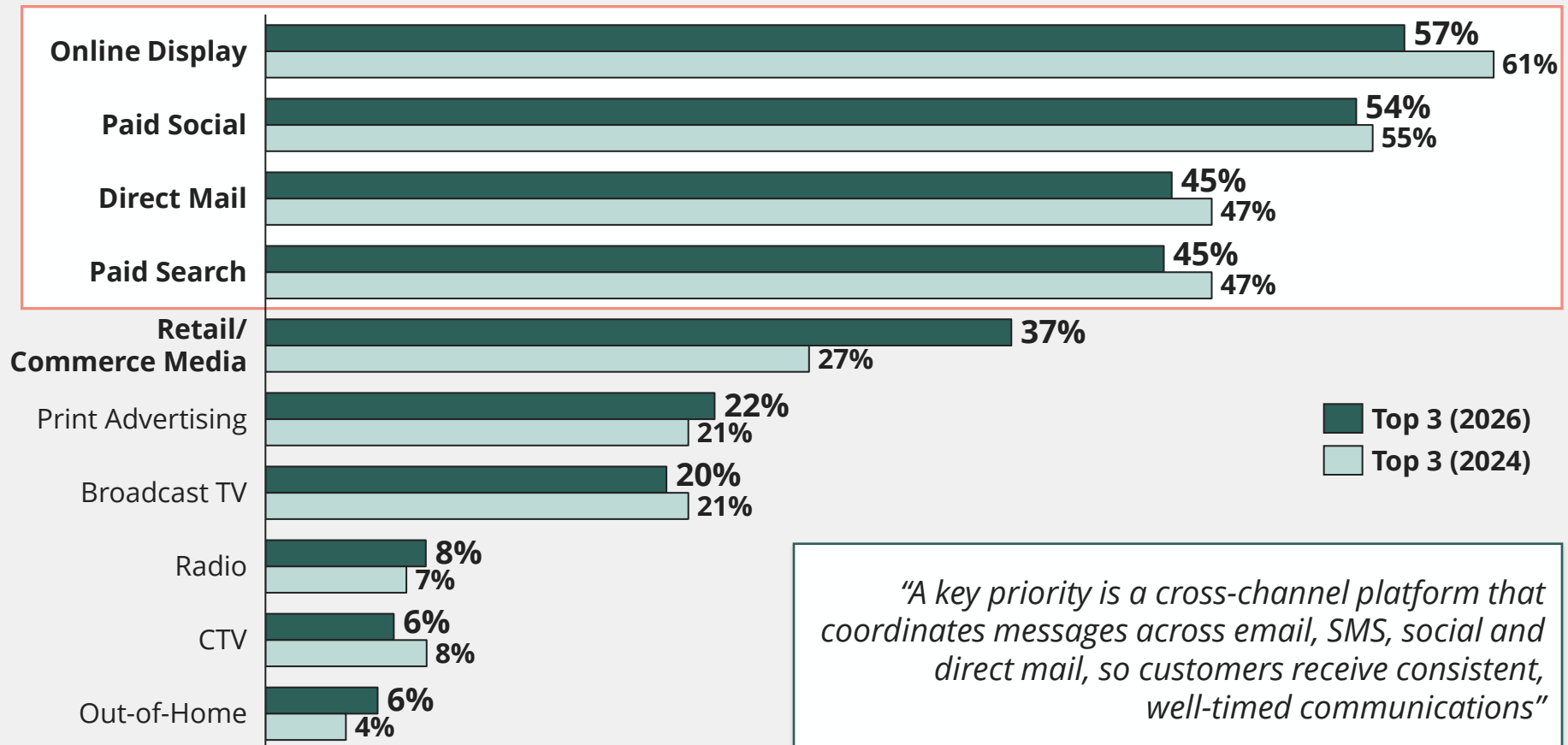
But the “core four” channels continue to predominate as marketers consider and activate the vehicles that help support their key outcomes. Online display advertising, paid social, direct mail and paid search are capturing the lion’s share of performance-oriented emphasis and spending, demonstrating unique resilience even as AI overviews diminish the usefulness of certain digital media, particularly search, as hubs for driving digital traffic.

That performance capability, particularly as it applies to campaigns where scale is of importance, explains much of direct mail’s enduring role in a mix otherwise dominated by digital channels. Marketers say they intend to continue growing their investment in DM as a means of optimizing their return on advertising spend, extending the reach of their marketing effort and ensuring a measure of direct control over their marketing efforts (offsetting the risks associated with concentrating too much budget into the costly digital “walled gardens”). They’re also focusing growing attention on retail/commerce media, an emergent category that capitalizes on a unique mix of digital and physical media to drive action at or near the retail point-of-sale.

The Performance Media Mix is Diverse, Spanning Traditional and Digital Media, Both “Established” and “Emergent”

Which of the following channels are most important in supporting your organization’s performance marketing objectives?

(% of respondents listing among top 3 channels, as asked in 2026 and 2024)

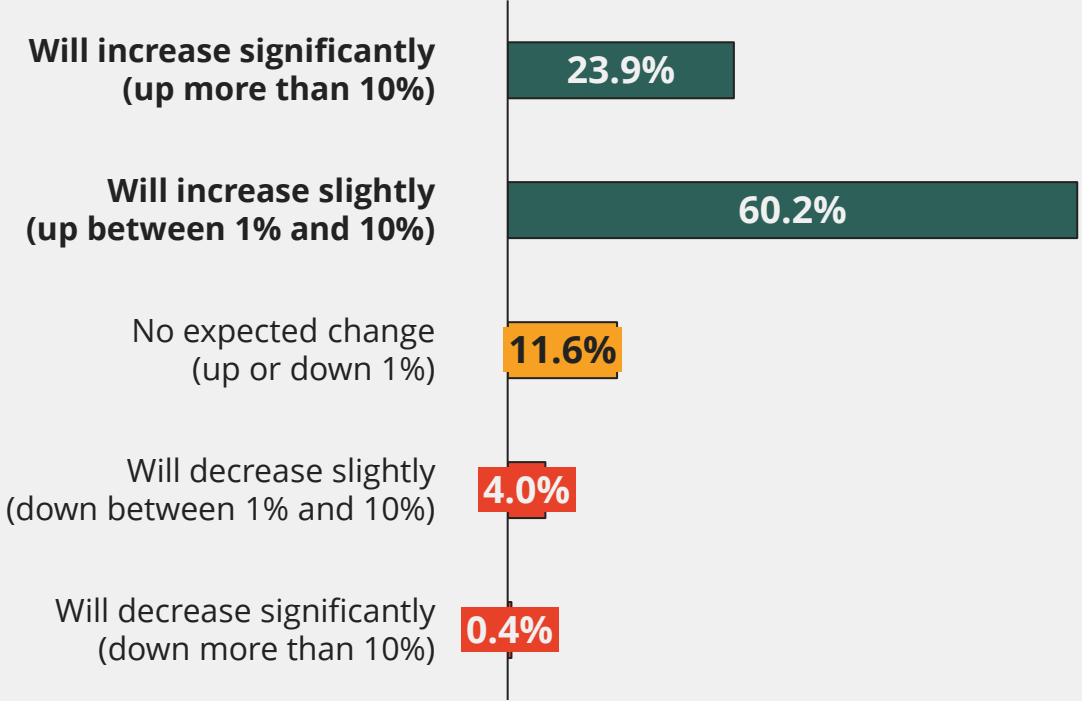


“A key priority is a cross-channel platform that coordinates messages across email, SMS, social and direct mail, so customers receive consistent, well-timed communications”

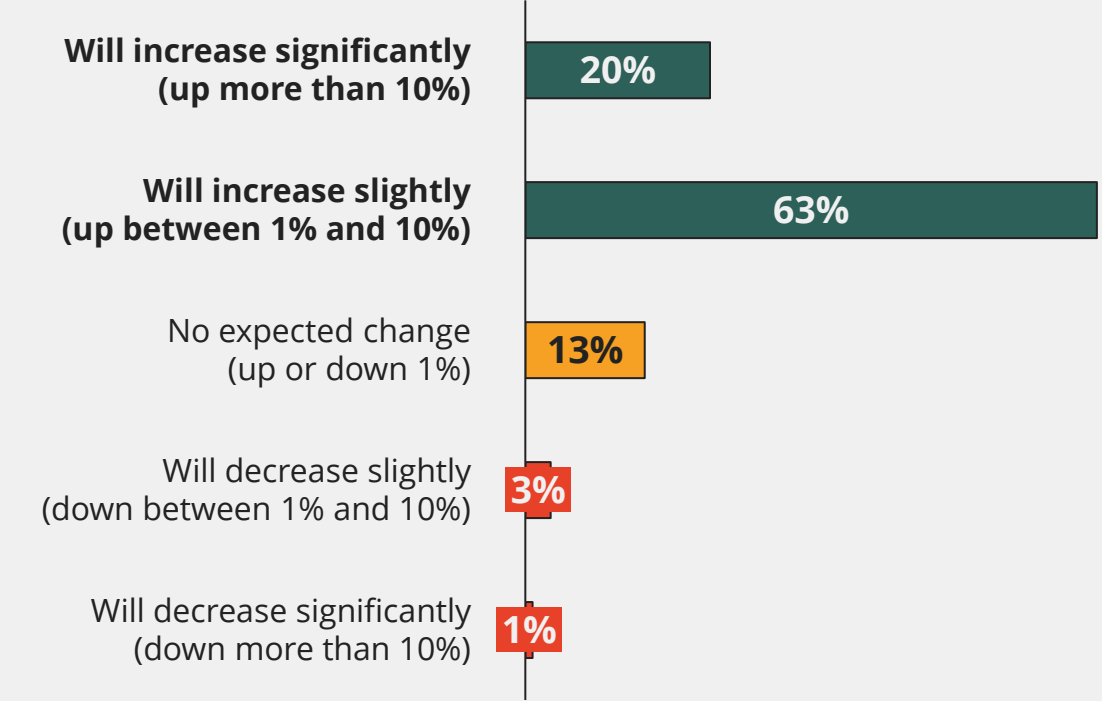
—Manager,
Healthcare/Pharmaceuticals

A Central Performance Role is Core to Direct Mail’s Budget Durability; Key Factor Behind Marketer Enthusiasm for the Channel

How did your organization’s spending on direct mail change in 2025, relative to the previous year?
(% of respondents)



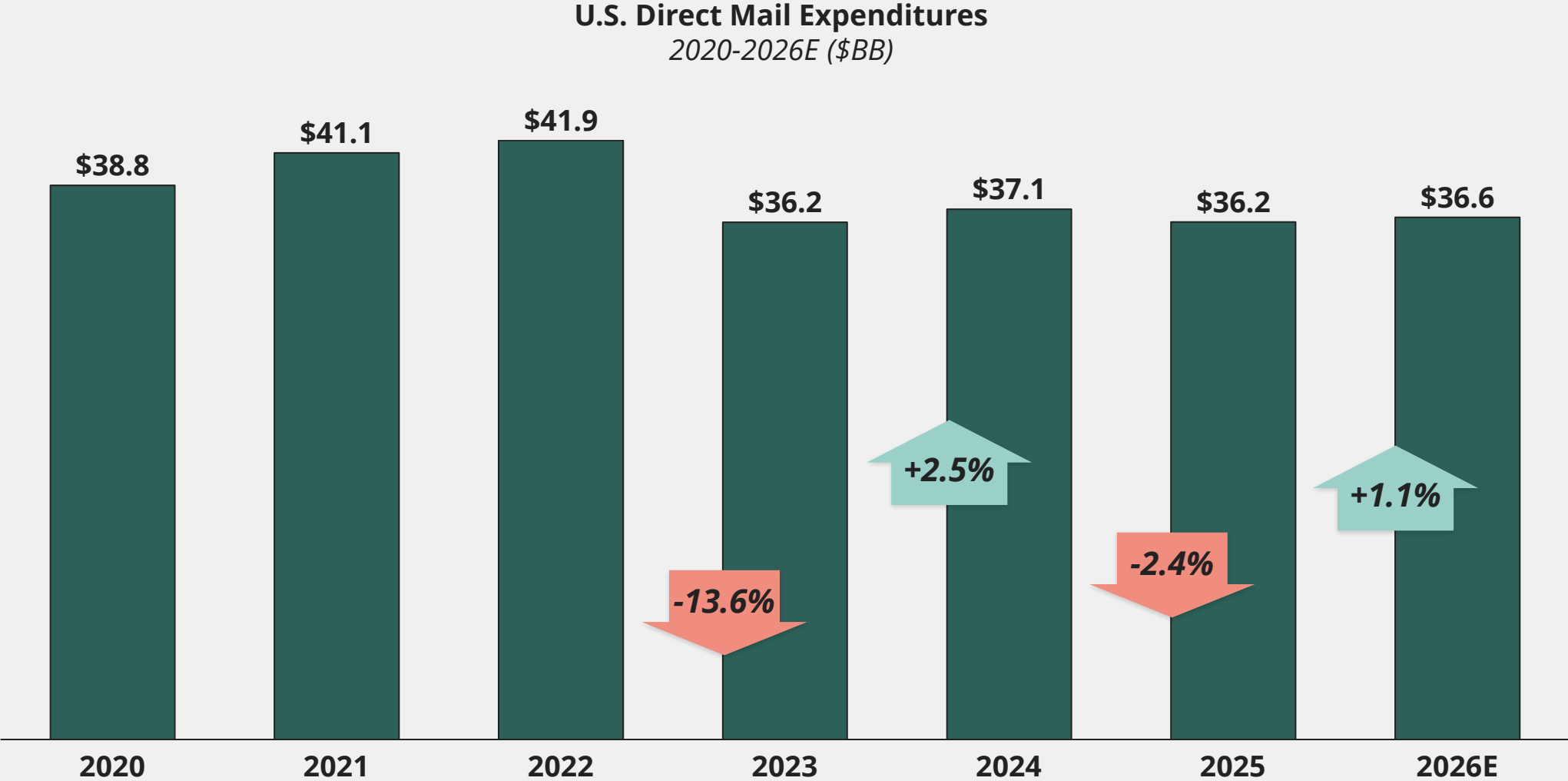
How do you expect your organization’s spending on DM will change in 2026, relative to last year?
(% of respondents)



“More so now than before, marketers don’t need to be sold on direct mail. They need to understand the incremental value of the next dollar invested in the channel”

—CEO,
Marketing Agency

Direct Mail Spending Expect to Grow in 2026, Continuing a Cyclical Trend Seen Most Often During Election Years

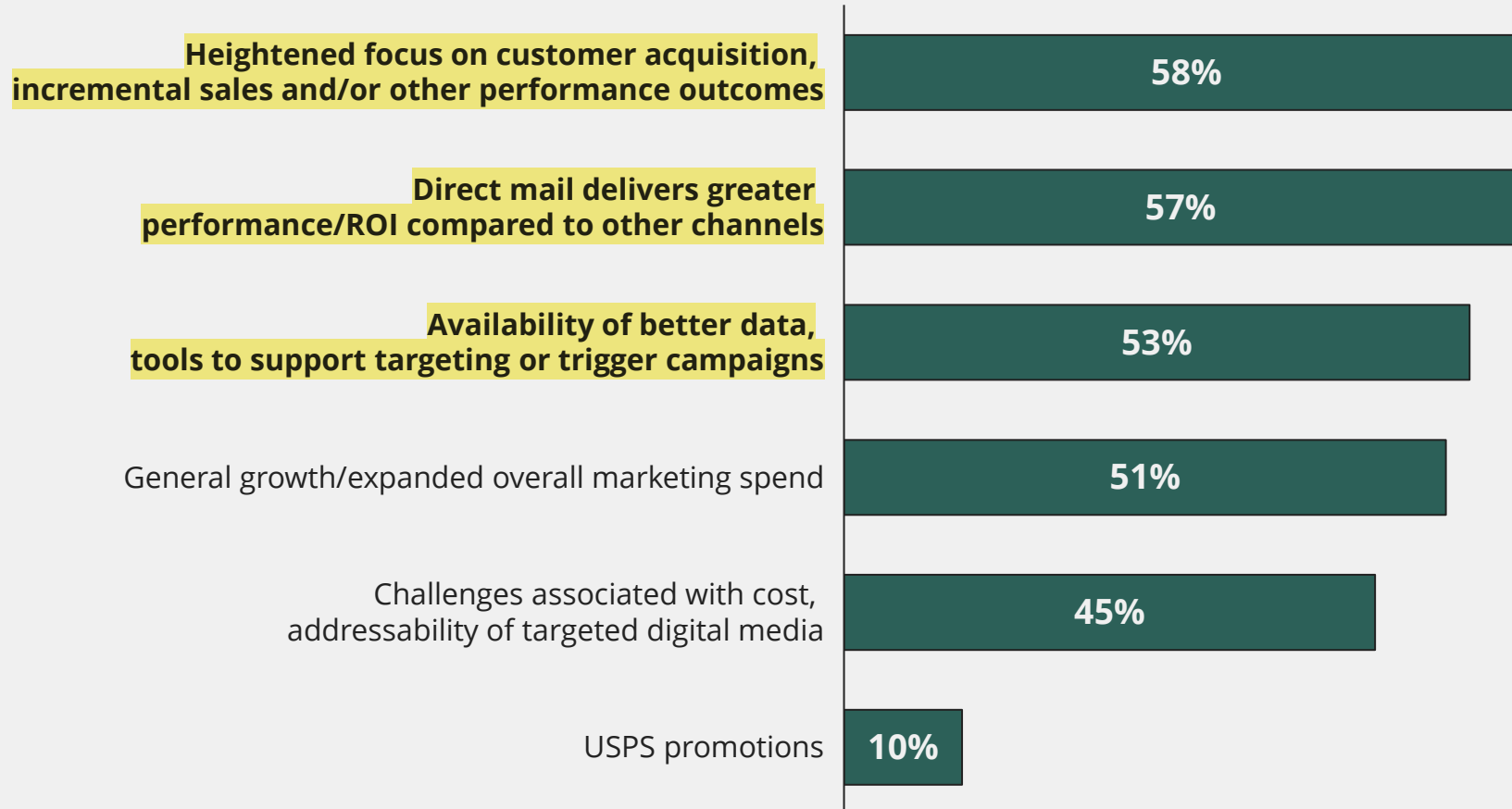


Note: Includes U.S. marketer investment in postage, materials, printing and mailing services, licensed data/lists, data management/hygiene, agency services and other functions associated with direct mail campaign development and execution
Source: Winterberry Group

Advances in Data and Technology Present Solid Foundations Upon Which Brands Are Basing Their Plans to Invest in Direct Mail

Which of the following factors do you expect to be most responsible for driving your organization's expected 2026 increase in DM spending?

(% of respondents)



A grayscale background image showing a person's hands interacting with a laptop. One hand is pointing at the screen, while the other is near the keyboard. The laptop screen displays a website with a sidebar menu and a main content area. In the foreground, there is a white notebook with a black pen resting on it.

As AI disrupts their ability to attract and engage digital audiences, brands are vesting renewed importance in high-impact, real-world content and experiences.

AI is changing how audiences find information and evaluate product options—providing a powerful new platform to source answers that often bypasses established portals like that offered by search engines and digital content hubs. But it's also serving to intensify consumer distrust of digital content and information, particularly as “AI slop” finds its way to more corners of the social, influencer and commerce ecosystems.

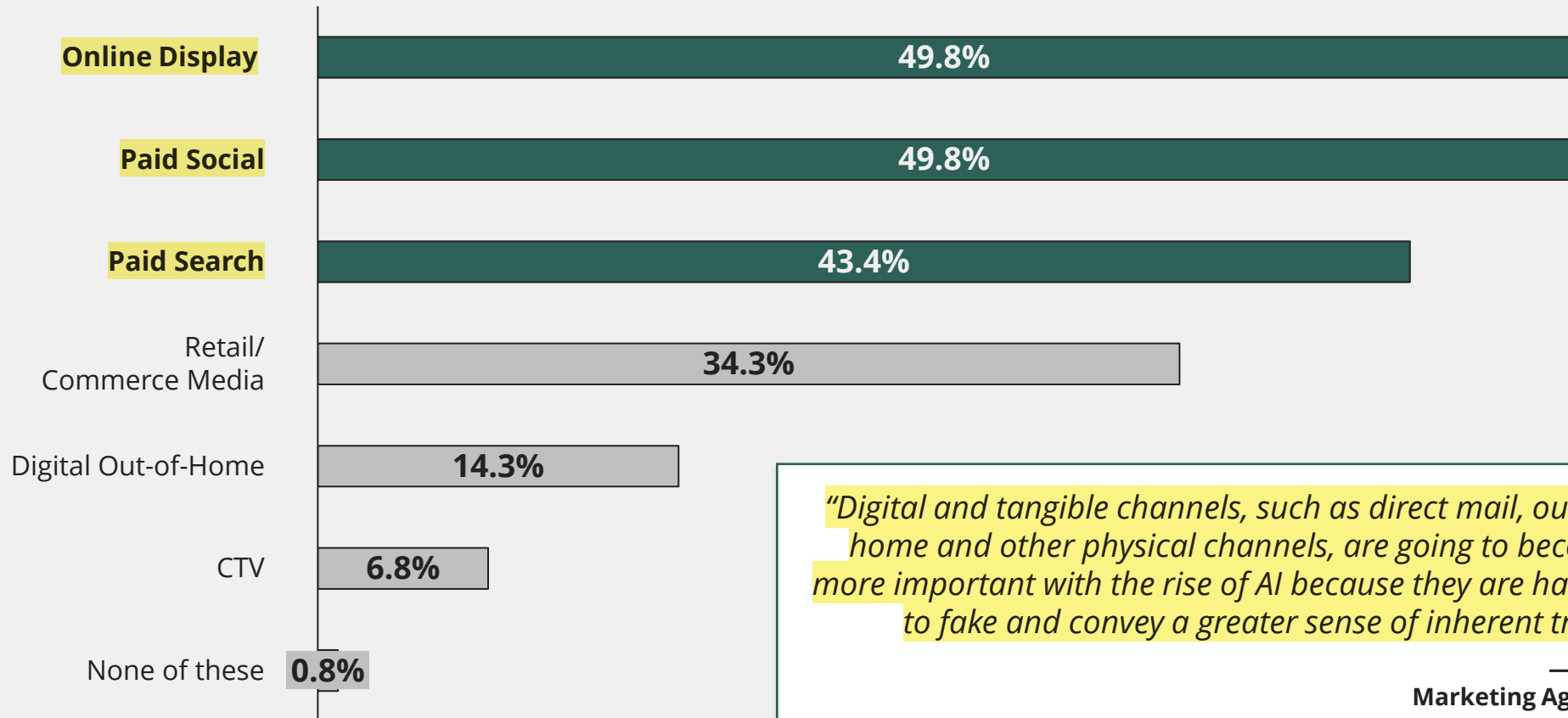
Brands are increasingly responding in two ways: by prioritizing channels that deliver clear, credible, trusted content and information. And by redoubling their efforts to orchestrate true “omnichannel” programs—capitalizing on the interplay between *multiple* media so as to reinforce a consistent experience and provide mechanisms for interactivity.

That's certainly not a new development; after all, brands have been working toward such alignment for decades in an effort to improve audience experiences and optimize how they deploy precious media dollars. But ironically, the same “AI” force that is driving the need for intensified omnichannel deployment may well serve as the conduit making such programs truly possible—with AI increasingly emerging as a potential tool to support audience segmentation, media deployment, content personalization and channel orchestration.

Direct Mail Is Most Often Seen to Improve Performance Across Core Digital Channels

Among the digital channels your organization leverages, which tend to benefit from the greatest performance improvement when deployed in conjunction with DM?

(% of respondents)

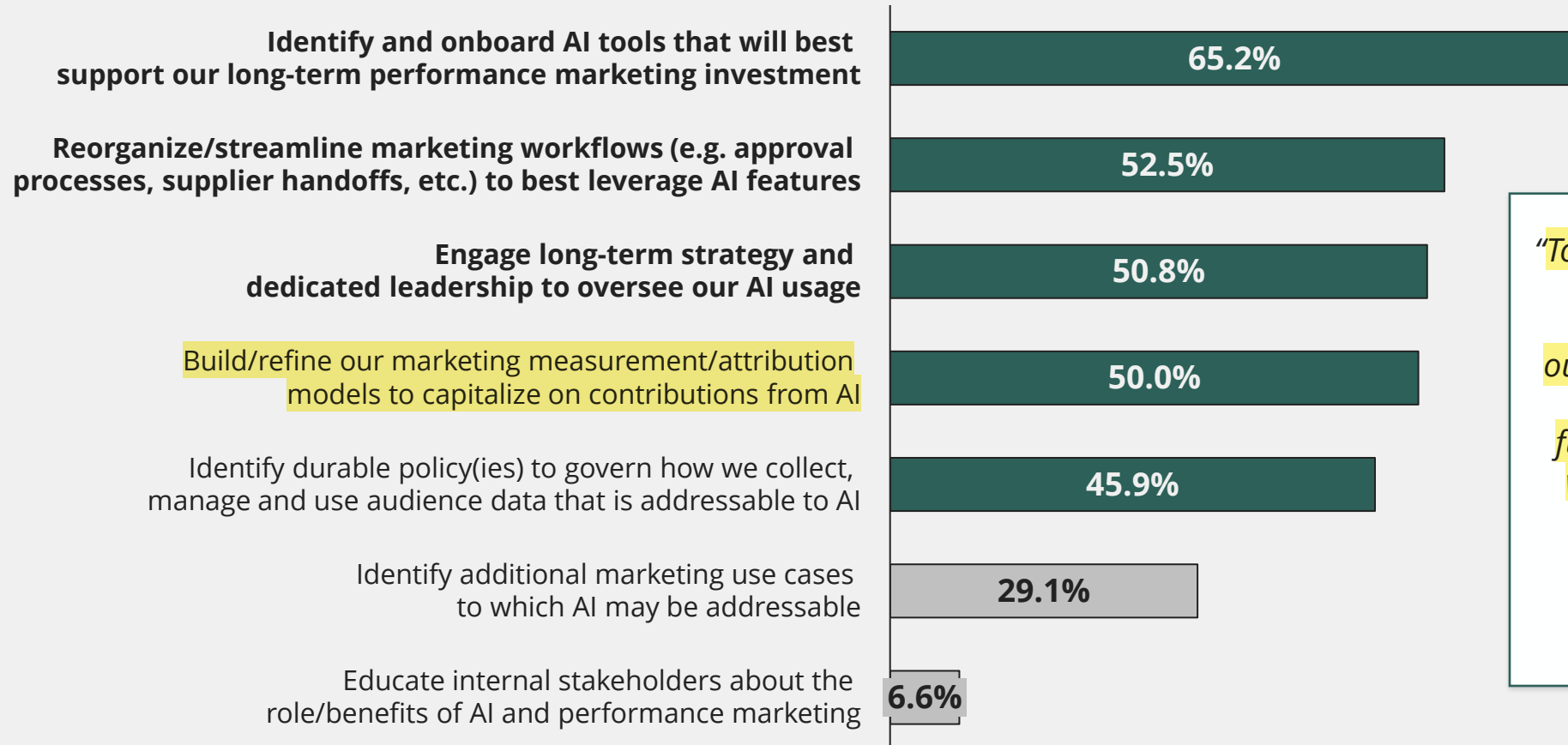


"Digital and tangible channels, such as direct mail, out-of-home and other physical channels, are going to become more important with the rise of AI because they are harder to fake and convey a greater sense of inherent trust"

—CEO,
Marketing Agency

Marketers Are Prioritizing the Tools, Workflows and Measurement Models Needed to Put AI to Work

What are your organization's top priorities as you consider how to best capitalize on AI as a tool to support your performance marketing efforts?
(% of respondents)



"To get the most out of AI, we need better integration between our digital intent data and physical fulfillment system, so we can trigger direct mail based on real-time web behavior"

—Director,
B2B Technology



Marketers have advanced steadily up the maturity curve in their efforts to deploy AI in support of performance-oriented applications; data-oriented use cases now command central attention and investment.

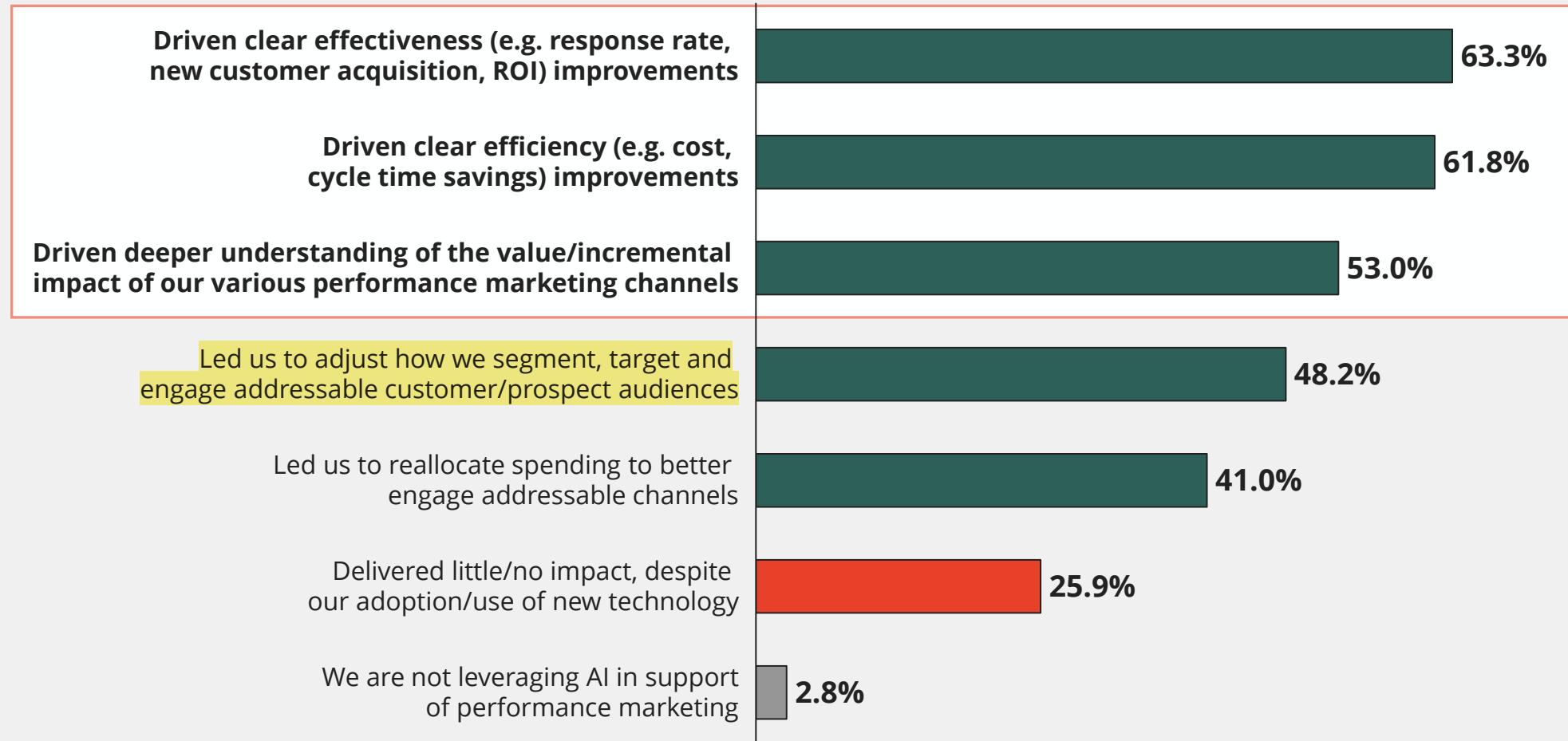
For marketers, early AI applications mirrored those being trialed by the peers across other enterprise functions. Brands experimented with first-generation tools with an eye on driving straightforward process efficiencies—using AI as a means of streamlining workflows, reducing duplicative or manual human effort and adding an additional level of editorial oversight to campaigns that were complex and highly variable across target audiences, media and geographies.

But times have changed. And in a relatively short window of time—it's been less than four years since ChatGPT was introduced as the first widely-adopted generative tool to apply large language modeling—marketers have moved to not just *adopt* AI tools on a widespread basis; they're also expanding their utilization to support more complex use cases where the transformative powers of the technology can drive more direct and impactful results.

Today, that's manifesting in the heavy concentration of AI effort on data-oriented use cases. Brands are tapping into third-party tools—and, increasingly, developing their own custom applications based on commercial platforms—to harness the combined power of their proprietary and licensed data assets, support richer audience segmentation, predictive targeting, offer selection and configuration of trigger-driven programs.

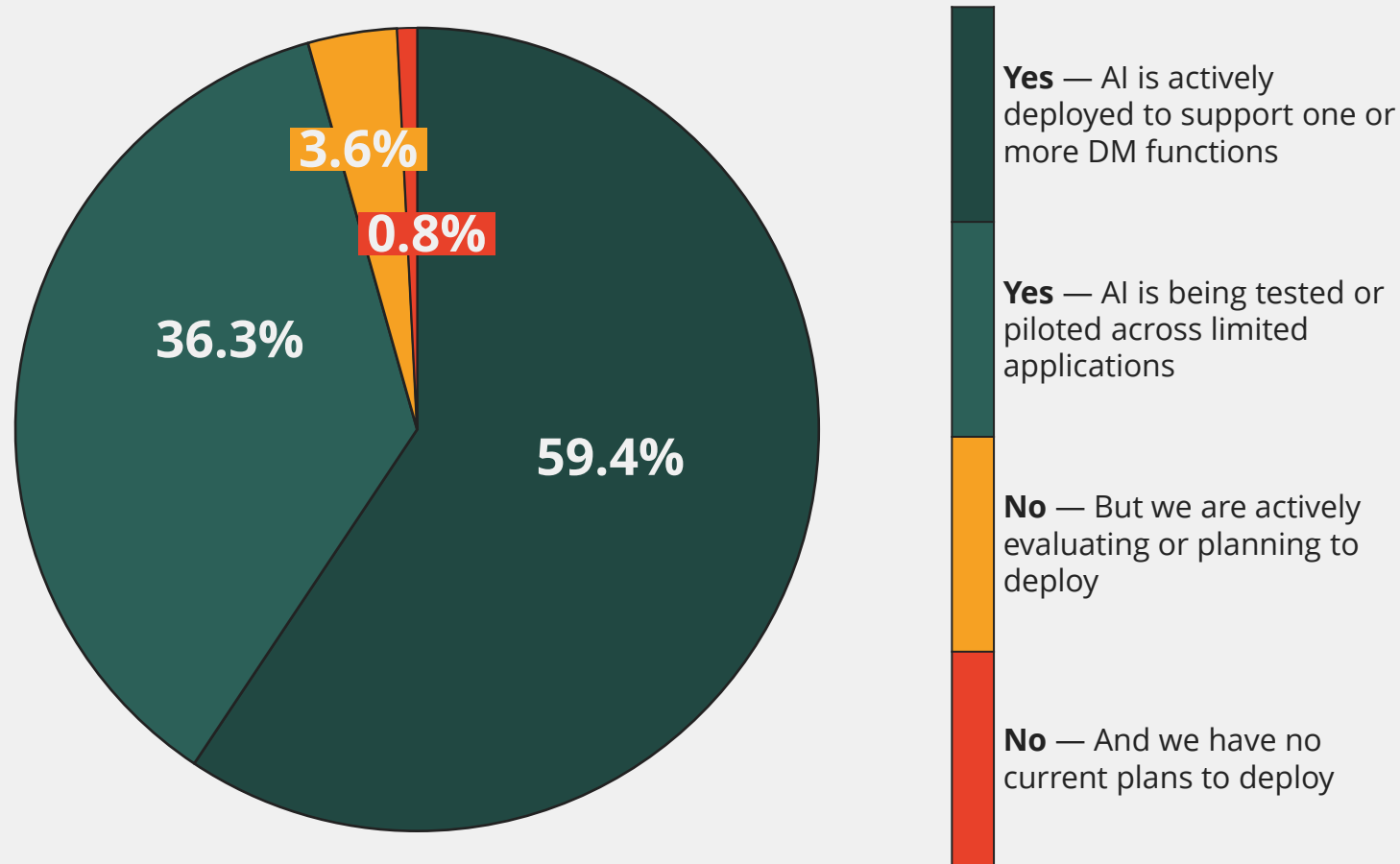
Brands Have Advanced Significantly in Their Efforts to Deploy AI in Support of Performance Marketing

How has AI impacted your organization's performance marketing efforts over the past year?
(% of respondents)



Direct Mail is a Central Part of Strategies Aimed at Putting AI to Work in the Service of Better Marketing Outcomes

Does your organization currently utilize AI, machine learning and/or similar advanced technologies to support its direct mail programs?
(% of respondents)



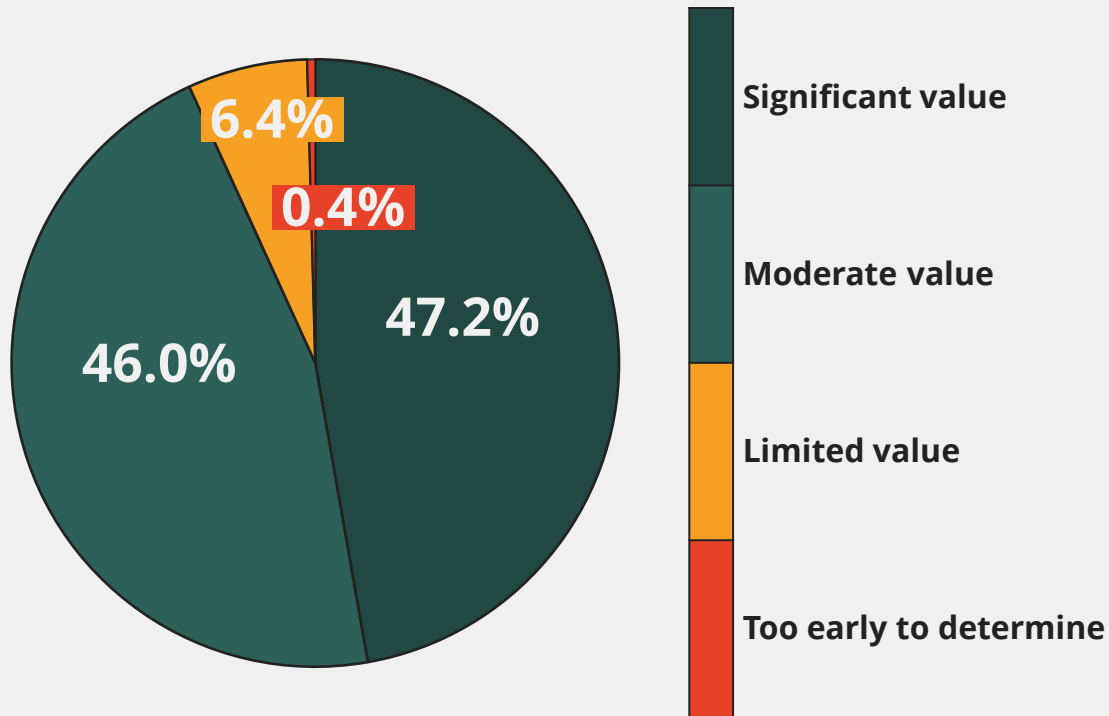
"AI can help customize direct mail content to improve conversion rates, while using predictive models to optimize delivery timing and budget allocation"

—Director,
Automotive

Brands Are Reporting That Those Investments Are Returning Real, Quantifiable Value Across a Range of Disciplines...

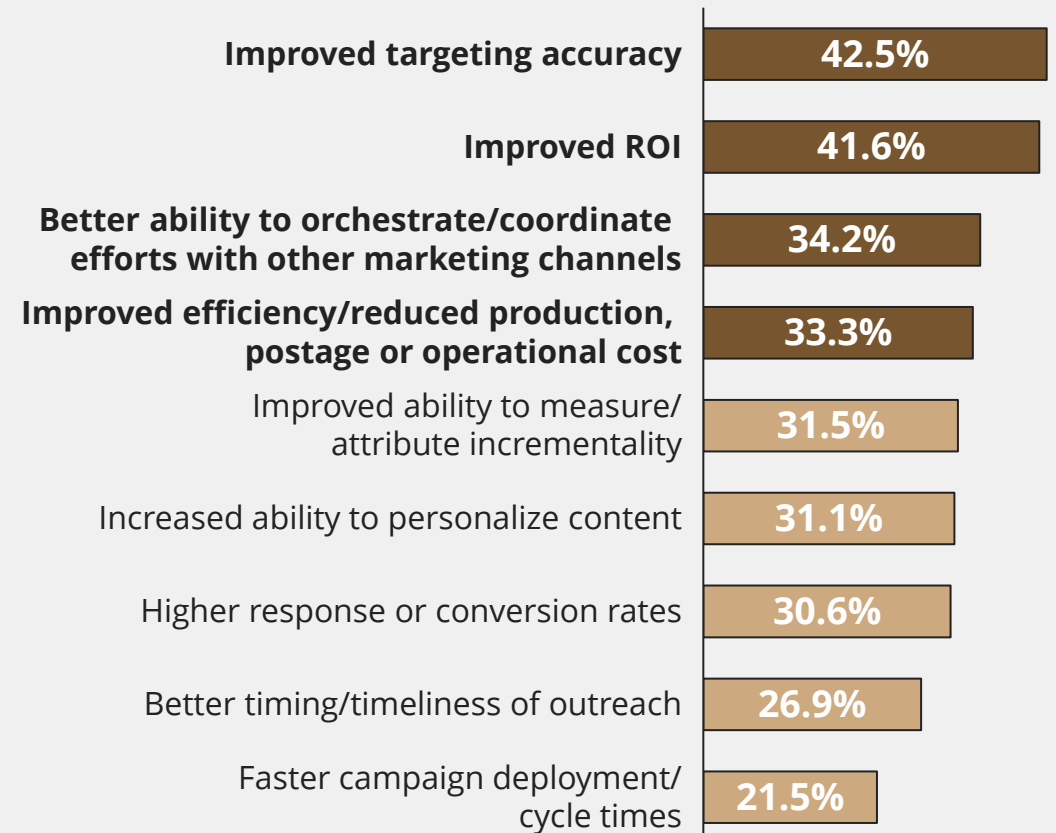
How would you characterize the *incremental value* your organization has realized through its use of AI in support of its DM programs?

(% of respondents)



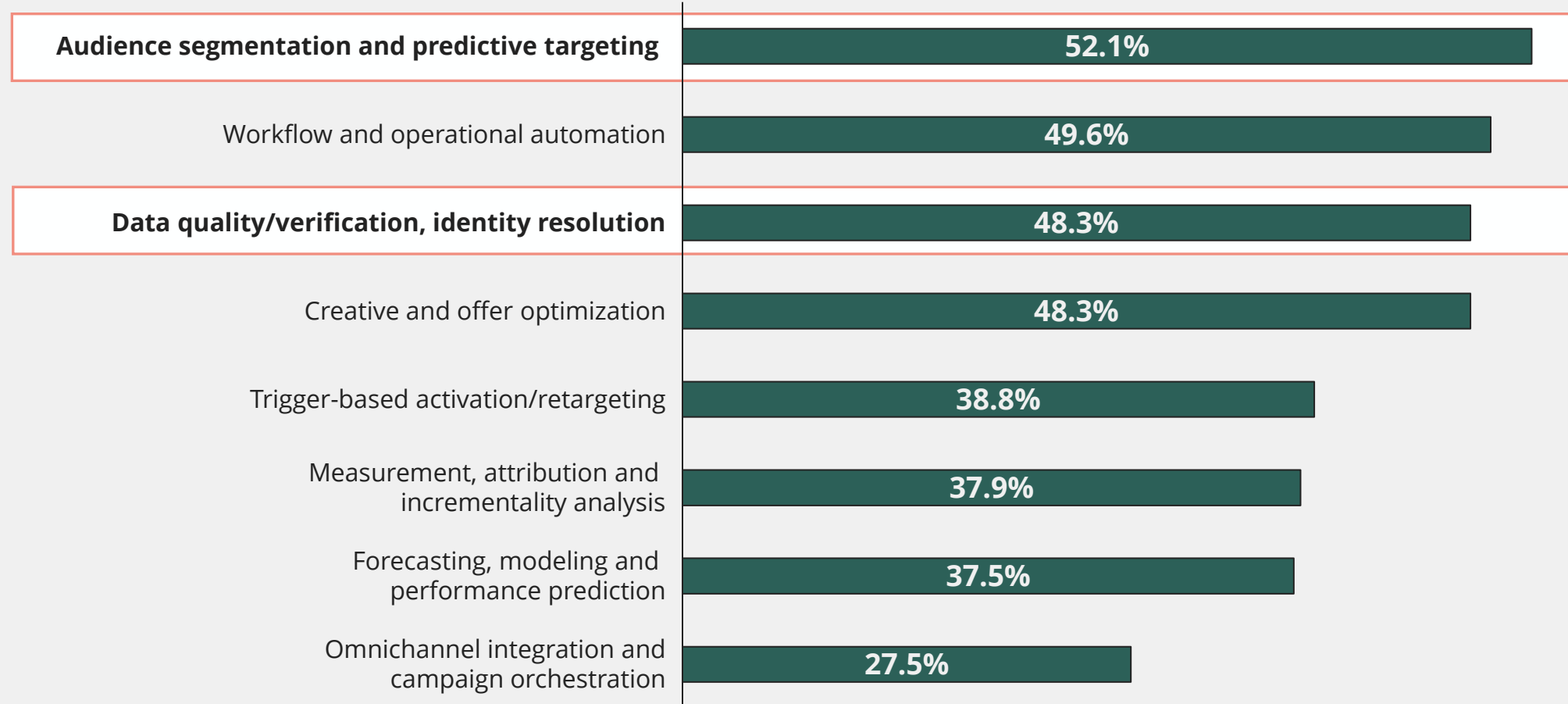
What are the most significant *benefits* your organization has realized from the use of AI in support of its DM programs?

(% of respondents)



... And They're Responding By Expanding The "AI Mandate" to Address a Broader Array of Use Cases

Toward which of the following applications/use cases has your organization utilized AI to support its DM programs?
(% of respondents)



A grayscale photograph of a person's hands typing on a laptop keyboard. The laptop screen displays a complex dashboard with various charts, including a pie chart and several line graphs. To the right of the laptop, a smartphone and a pair of glasses are visible on the desk surface.

The challenge ahead: leverage AI as a vehicle to support orchestration of true “omnichannel” marketing programs, capitalizing on data and addressable media to optimize business outcomes and deliver better consumer experiences.

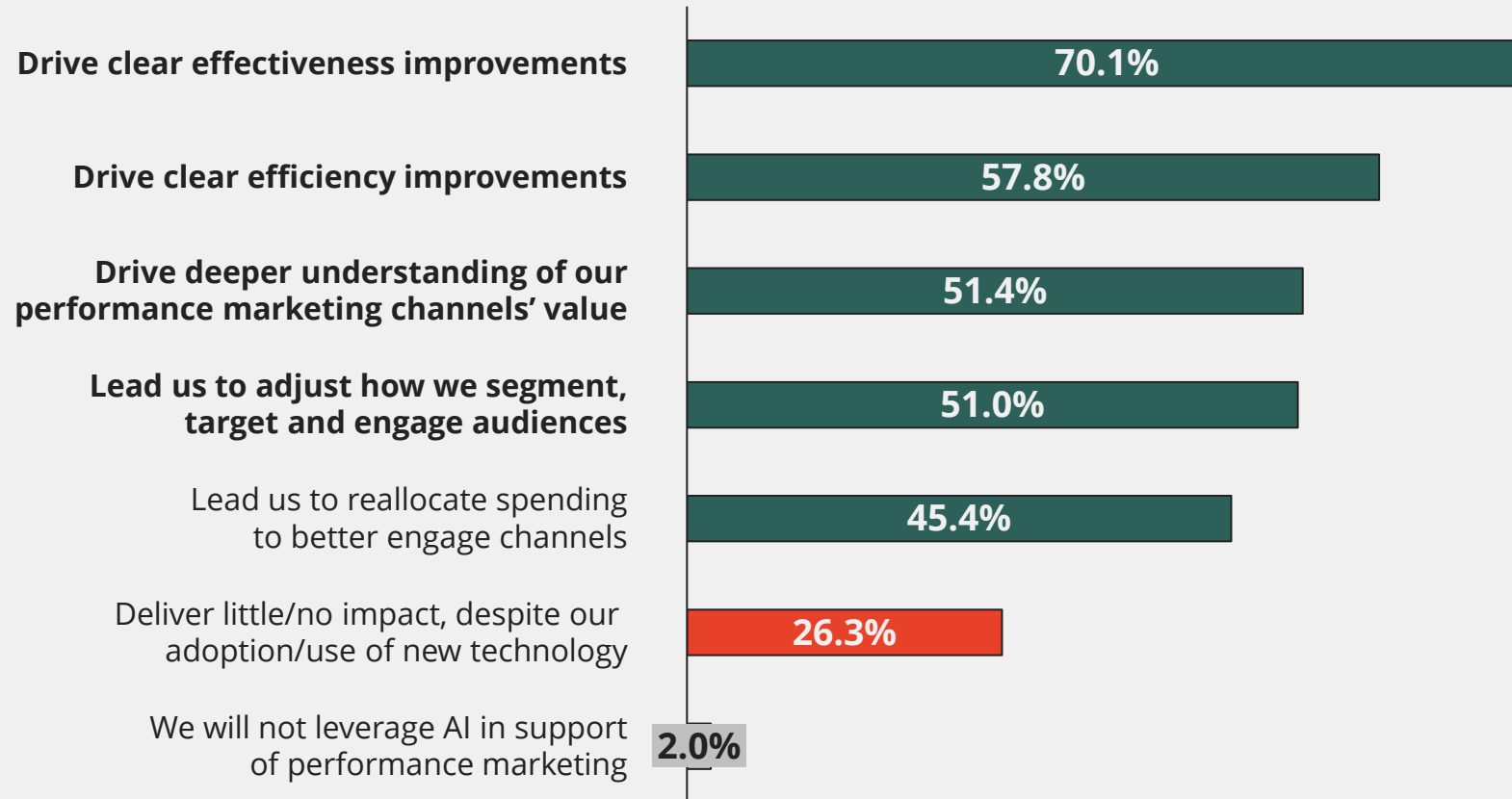
Marketers are naturally an optimistic bunch. Except when facing the most extraordinary obstacles, they tend to expect budgets will grow, market opportunities will present themselves and technology will open the door to wholly new ways of doing things.

AI appears to represent the latest and most tangible approach for channeling that optimism—and, perhaps not surprisingly, brands are bullish on the potential of the technology to help support growth and value-creation in a host of different ways. That growth will come at a cost; brands are increasingly coming to realize that the computing power required to operate large-scale AI efforts requires substantial investment, both in dollars and effort associated with integrating into other technologies and organizational systems.

But many say the costs will be well worth the benefit of unlocking the most transformative use case of them all: the ability to orchestrate the planning and deployment of *multiple* channels in support of performance marketing, optimizing for audience management, channel selection, resourcing, timing, content personalization and a range of other applications that today are generally managed in separate functional systems or operating silos.

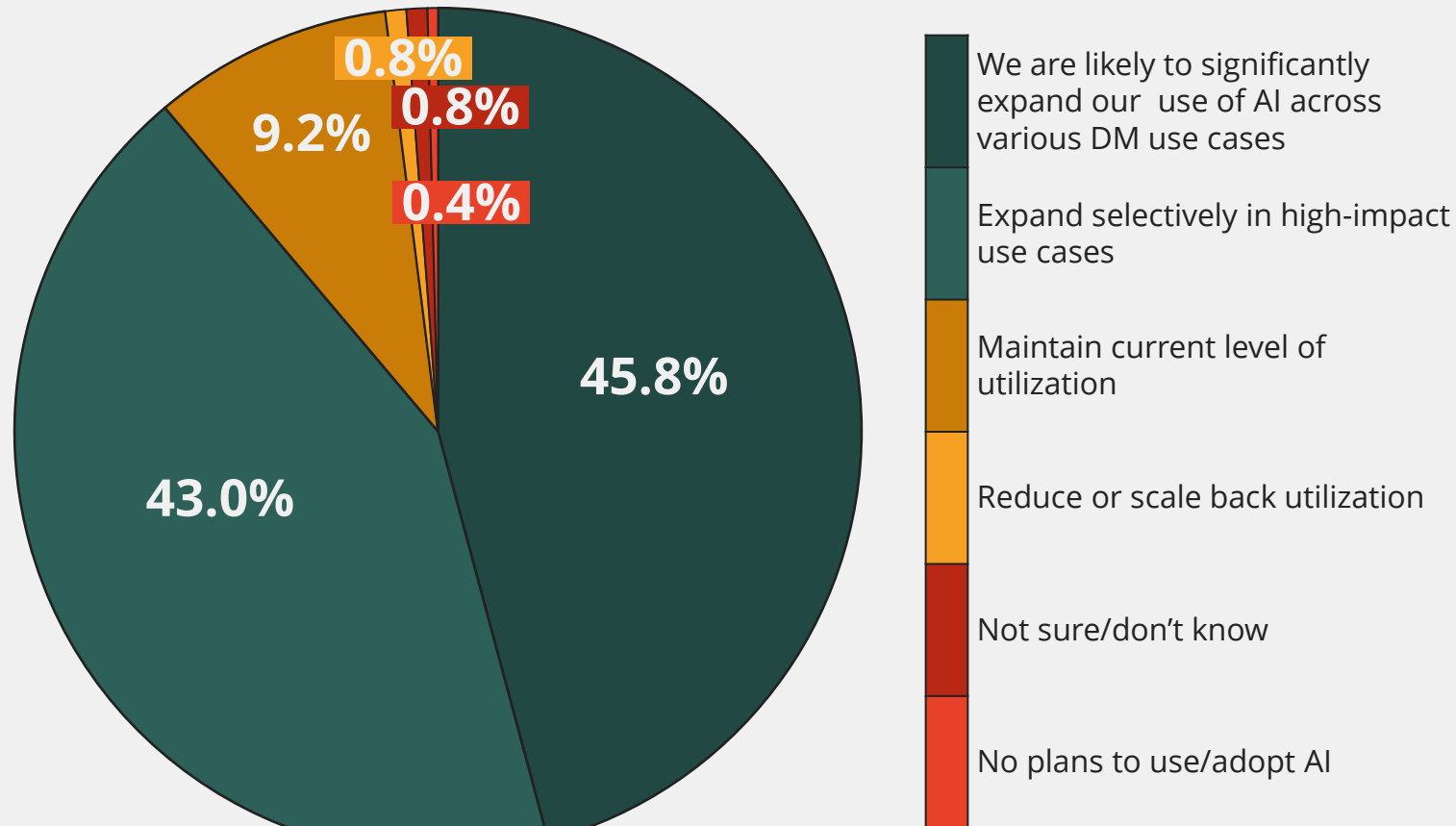
Marketers Are Enthusiastic About the Potential for AI to Continue Driving Meaningful Growth

How do you expect AI to impact your performance marketing efforts over the next two years?
(% of respondents)



That Enthusiasm Extends to Direct Mail, Where Marketers Expect to Expand AI Across High-Impact Use Cases

Which of the following best reflects your organization's priorities (with respect to the use of AI in support of DM) over the next three years?
(% of respondents)

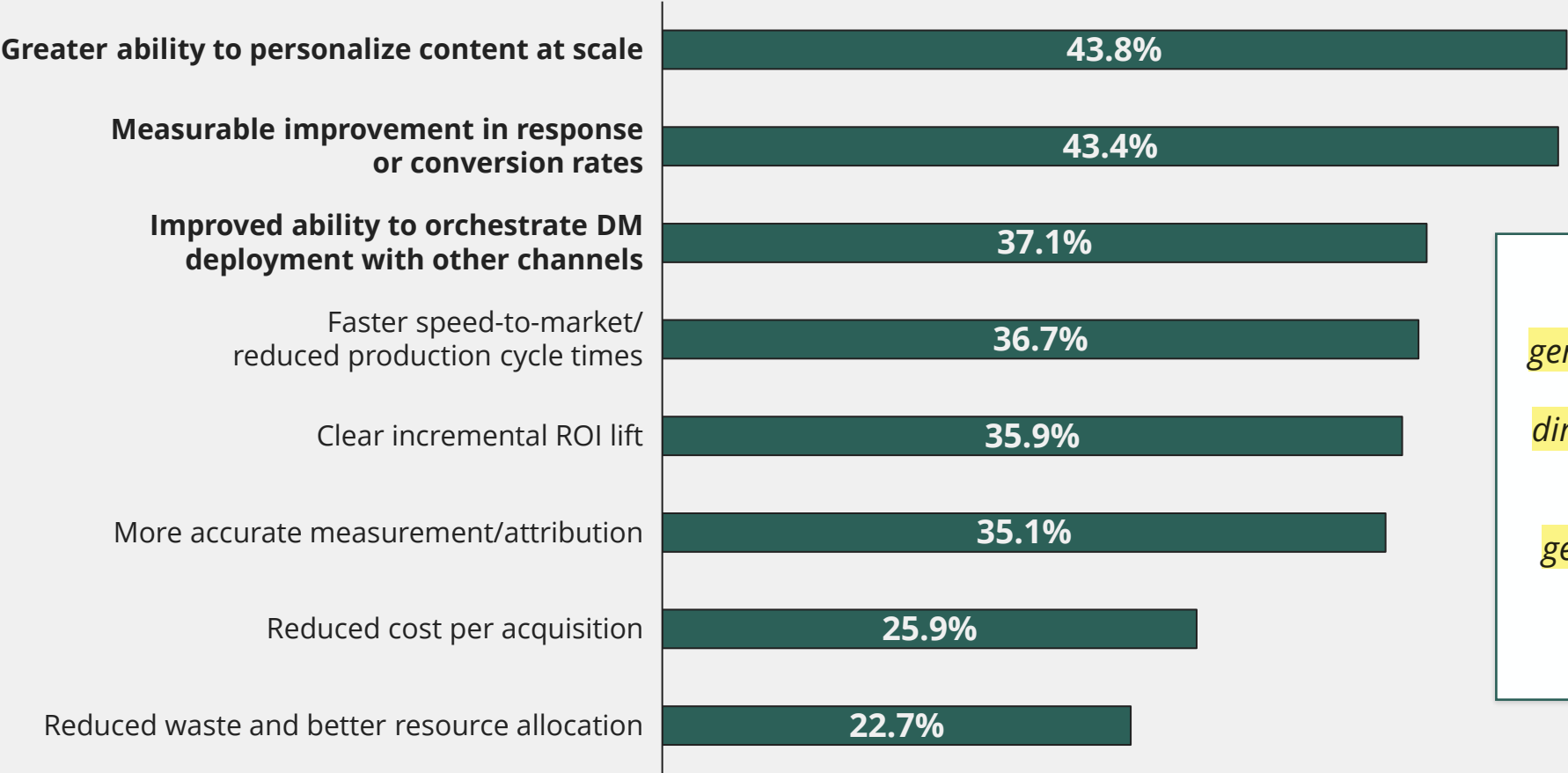


"We are focused on AI-powered predictive analytics for precise audience segmentation and personalized messaging, alongside integrated omnichannel data platforms that unify direct mail and digital customer data for real-time insights. We are also using generative AI content tools to automate customized mail designs and complementary digital assets"

—President/CEO,
CPG

Turning that Ambition Into Impact Will Require Progress Across a Long AI Deployment Agenda

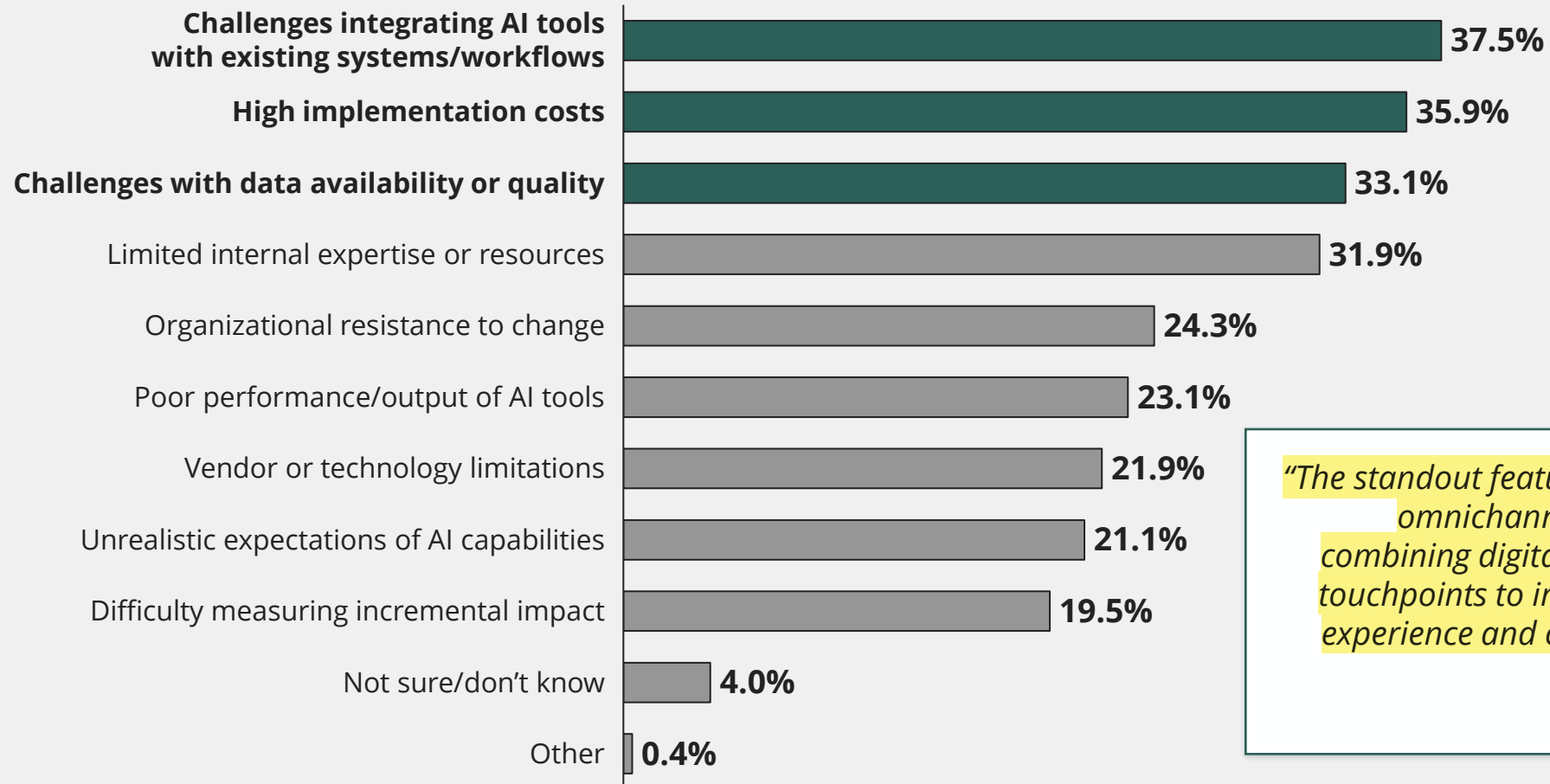
Which of the following outcomes would you associate with “best case” application of AI in support of your organization’s future DM programs?
(% of respondents)



“Automated creative generation and personalized layout tools would enable direct mail copy, images and layouts to be tailored to different audiences, while generating print-ready files”
—Director, Automotive

But Delivering on that Agenda Will Require Marketers to Address Integration, Cost and Data Challenges

What obstacles or challenges are you most concerned could hinder your organization's ability to leverage AI in support of its direct mail programs in the future?
(% of respondents)



"The standout feature is AI-powered omnichannel orchestration, combining digital and direct mail touchpoints to improve customer experience and conversion rates"

—Director,
CPG

The AI Maturity Curve Is Taking Shape, with Marketers Making Progress Toward Orchestration and Attribution-Driven Optimization

"We need better **data integration across channels** so we can stop managing direct mail and digital in separate silos. **AI tools that generate creative variations automatically** would save a ton of time. Better attribution would also help us understand what is working across channels. *Right now we're spending, but not sure what's driving the results*"
— C-Level Executive, Insurance

"We **aggregate, cleanse and deduplicate online and offline data** in real time to create a unified dataset, providing **high-quality predictive data for AI models** that help us support personalized targeting and cross-channel consistency"
— EVP/SVP, B2B Technology

"We need a **centralized data orchestration platform** that can bridge the gap between our legacy systems and modern AI marketing tools. We also need **enhanced human-in-the-loop compliance frameworks** to automate the legal review of AI-generated personalized offers"
— Director, Financial Services

Gen 4 (Future):
Orchestration & Attribution-Driven Optimization

Gen 1 (2021+):
Workflow



Gen 2 (2023+):
Content/Creative Optimization



Gen 3 (2024+):
List Segmentation



Gen 3 (2025+):
Predictive Analytics



Looking Ahead: Toward an “Omnichannel Performance” Future

That marketers are leaning into performance applications—and investing in the media and tools needed to drive clear-cut, accountable outcomes—shouldn’t register as headline-making news. That they’re increasingly looking to do so by way of the transformative, rapidly-evolving suite of technologies known as AI... well, that probably shouldn’t provoke much surprise, either.

But make no mistake: the pace and extent to which brands have been advancing their efforts to deploy both generative and agentic AI in support of their promotional efforts was *never* a given. Marketers have been making steady progress up the technological maturity curve largely because the focal points of their efforts—**streamlining cumbersome processes, wrangling disparate (but highly valuable) audience datasets, aligning on coherent strategies to drive content personalization, orchestrating true “omnichannel” programs that deploy both traditional and media so that they may play their most impactful natural roles**—have represented *longstanding* aspirations and the effective North Stars of marketing innovation.

But what comes next has yet to be preordained. Mastering the requirements of “next generation” AI-driven marketing will require comprehensive, forward-looking strategies that consider the complementary roles of technology, data and media—especially as brands look to harness the reach and impact of well-established performance touchpoints, like direct mail, that have not always been core considerations in building enterprise-class marketing technology infrastructure. Naturally, that will require both brands and their supply chain partners to think critically about their goals, assets and expertise in mapping plans to put transformative technology to work.

Every company should address that challenge through a different lens, but a useful framework for considering those issues may look like:

“Mastering the requirements of ‘next generation’ AI-driven marketing will require comprehensive, forward-looking strategies that consider the complementary roles of technology, data and media”



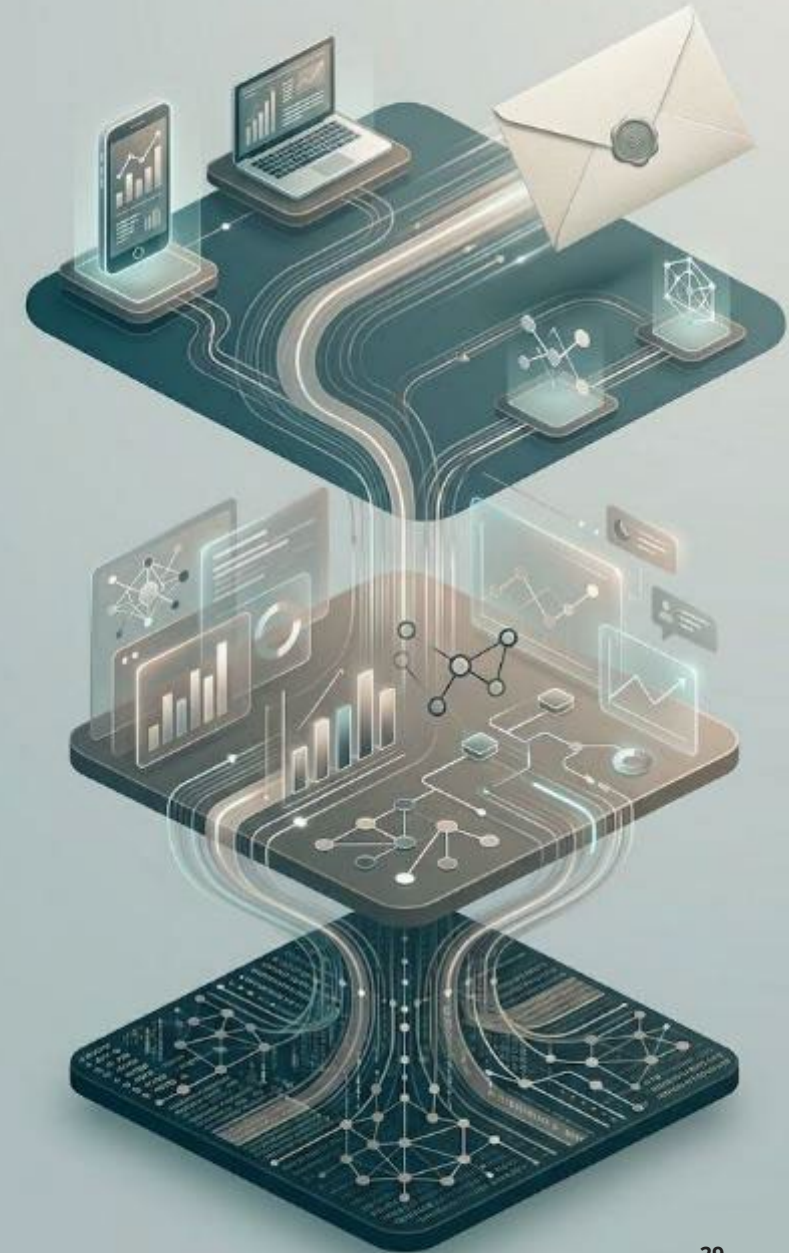
Looking Ahead: Toward an “Omnichannel Performance” Future (cont’d)

For marketers:

- What **business goals** (and/or transformation efforts) is the marketing team being tasked with supporting?
- How do those objectives map to **tangible marketing use cases**? How would you prioritize them for near-, medium- and long-term investment?
- Which use cases are you well positioned to support with existing internal tools/expertise? Where can AI be deployed in such a way that builds on those assets? Where may you need **external support**?
- How well do your internal, supplier systems support true **omnichannel attribution and orchestration**?

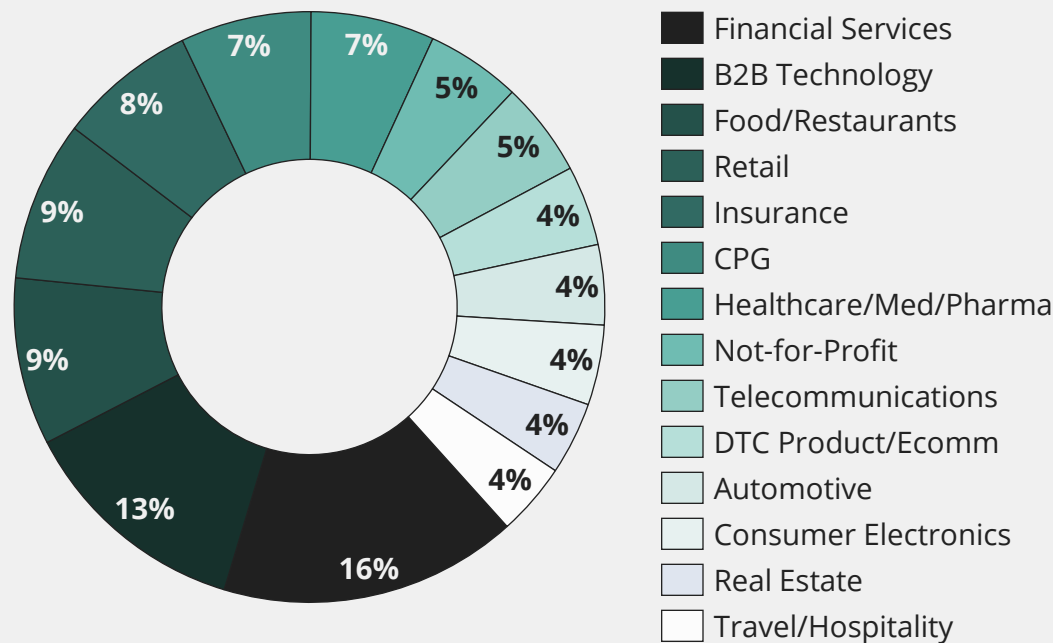
For agencies, data providers, technology platforms and other supply chain partners:

- What are your core capabilities, expertise and/or assets that constitute your **platform for growth**?
- How well positioned are you to capitalize on **unique/defensible expertise, technology and/or data**?
- Where can you focus/narrow your efforts to show functional, vertical or other clear **specialization**?
- Where might you need to pursue buy, build or partner initiatives to drive needed agility, support delivery of **true client-focused solutions**?

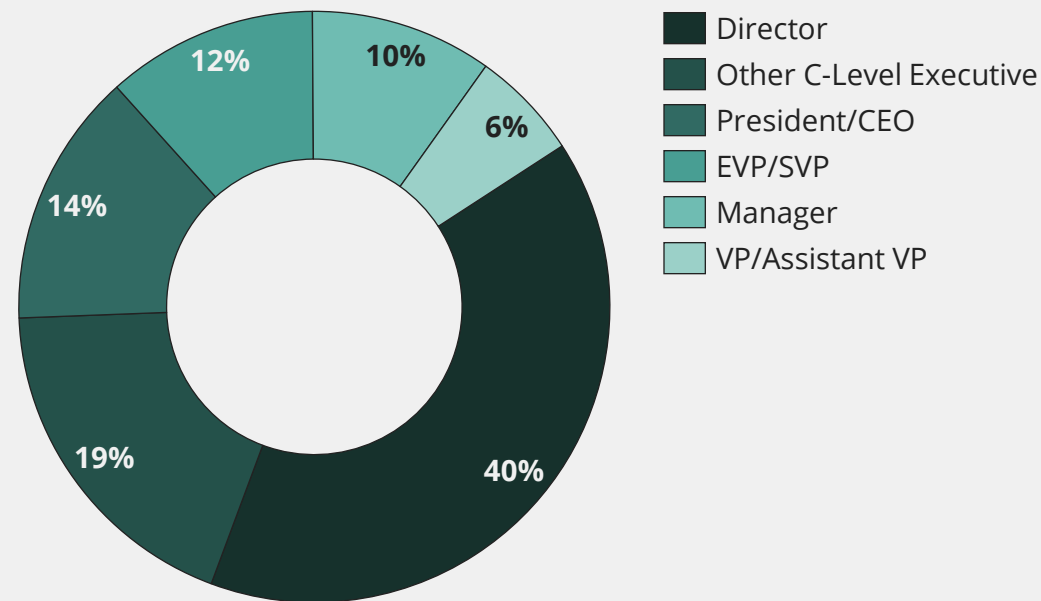


Appendix: Research Panel Composition

Survey Respondents:
Industry Breakdown



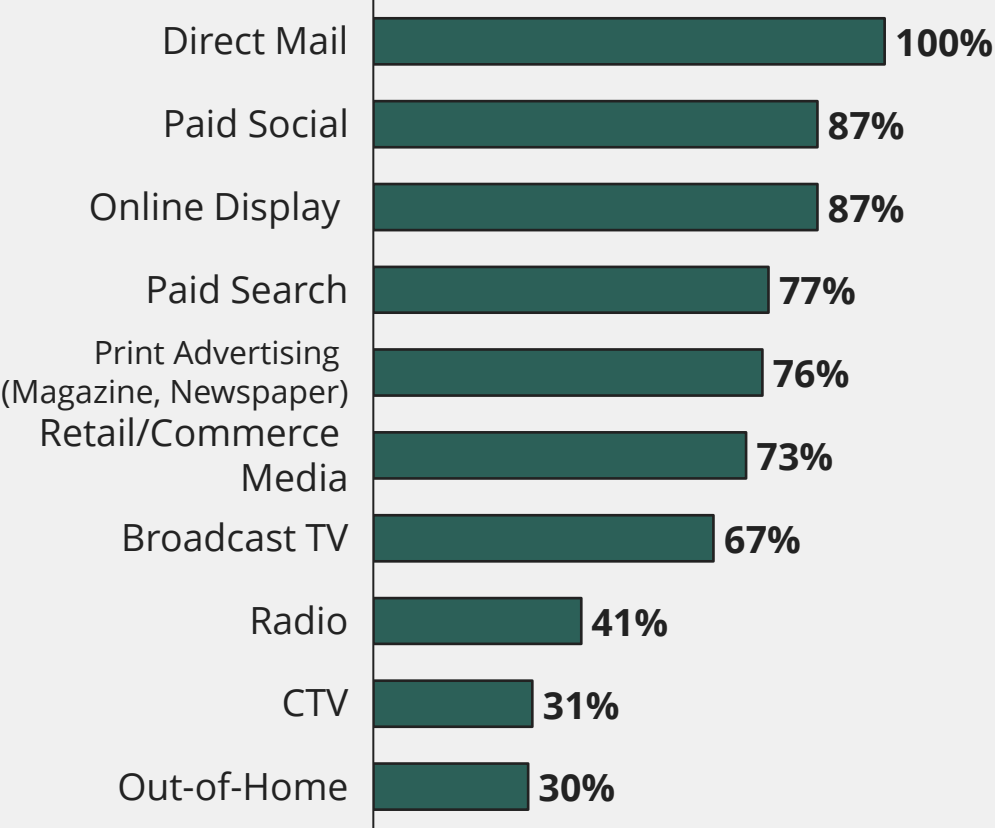
Survey Respondents:
Seniority/Business Title



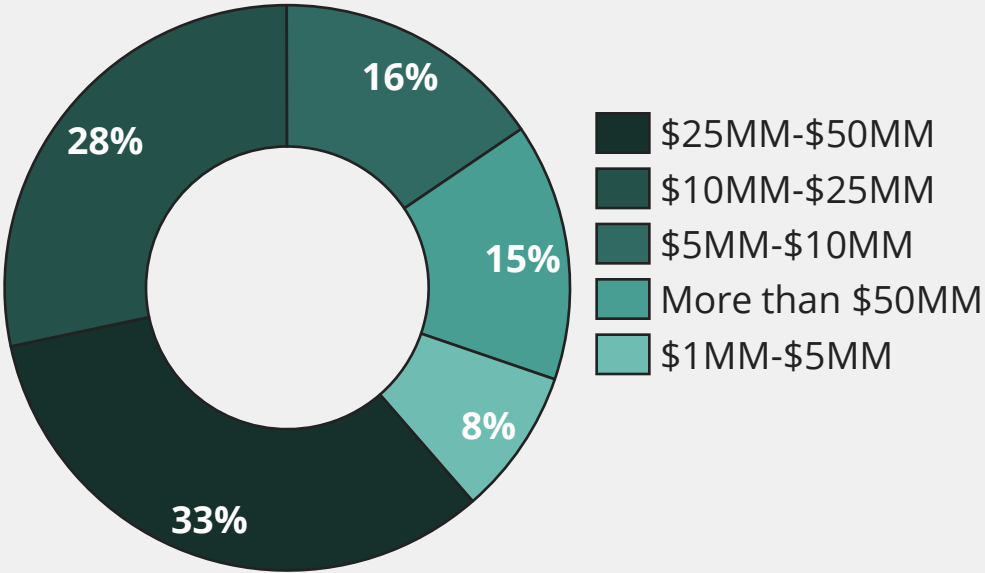
Note: All data presented in this report derived from this proprietary survey panel (n=251; compiled March 2026-April 2026)

Appendix: Research Panel Composition (cont'd)

Survey Respondents:
Utilization/Ownership of Marketing Channels



Survey Respondents:
Annual Marketing Budget (US\$MM)



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For nearly a decade, **NaviStone** has been partnering with enterprise B2C brands to uncover and engage hard-to-reach audiences across the modern marketing landscape. Known for its patented privacy platform and data-driven identity analytics, NaviStone has built a reputation for delivering personalized, multi-channel strategies that consistently outperform industry benchmarks.

To learn more, visit navistone.com

About Winterberry Group



Winterberry Group is a growth consultancy specializing in the intersecting disciplines of marketing, advertising, technology, data and analytics. We collaborate with stakeholders across those ecosystems—agencies, service providers, technology developers, publishers, marketer brands and investor groups—to identify and activate growth opportunities that drive the creation of real and lasting stakeholder value. Our diverse capabilities include:

- **Growth Strategy:** evaluate diverse opportunities and build comprehensive, actionable plans to drive expansion, build value
- **Operational Design:** put strategy into practice through architecture of new practice areas, implementation of “build” and “buy” growth initiatives
- **Mergers & Acquisitions:** help investors make sound, informed decisions through commercial due diligence, target identification
- **Market Intelligence:** compile and publish original insights grounded in rigorous primary and secondary research

To learn more—and to download additional copies of this and our other published research—visit winterberrygroup.com

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