CLEAR STRATEGY

CLEAR STRATEGY PROPRIETARY RESEARCH

The State of *AI in Marketing.*

A field study of 100 marketing leaders on how AI is used, coordinated, governed, and funded — and where the operating discipline still has to be built.

EDITION
Volume 01

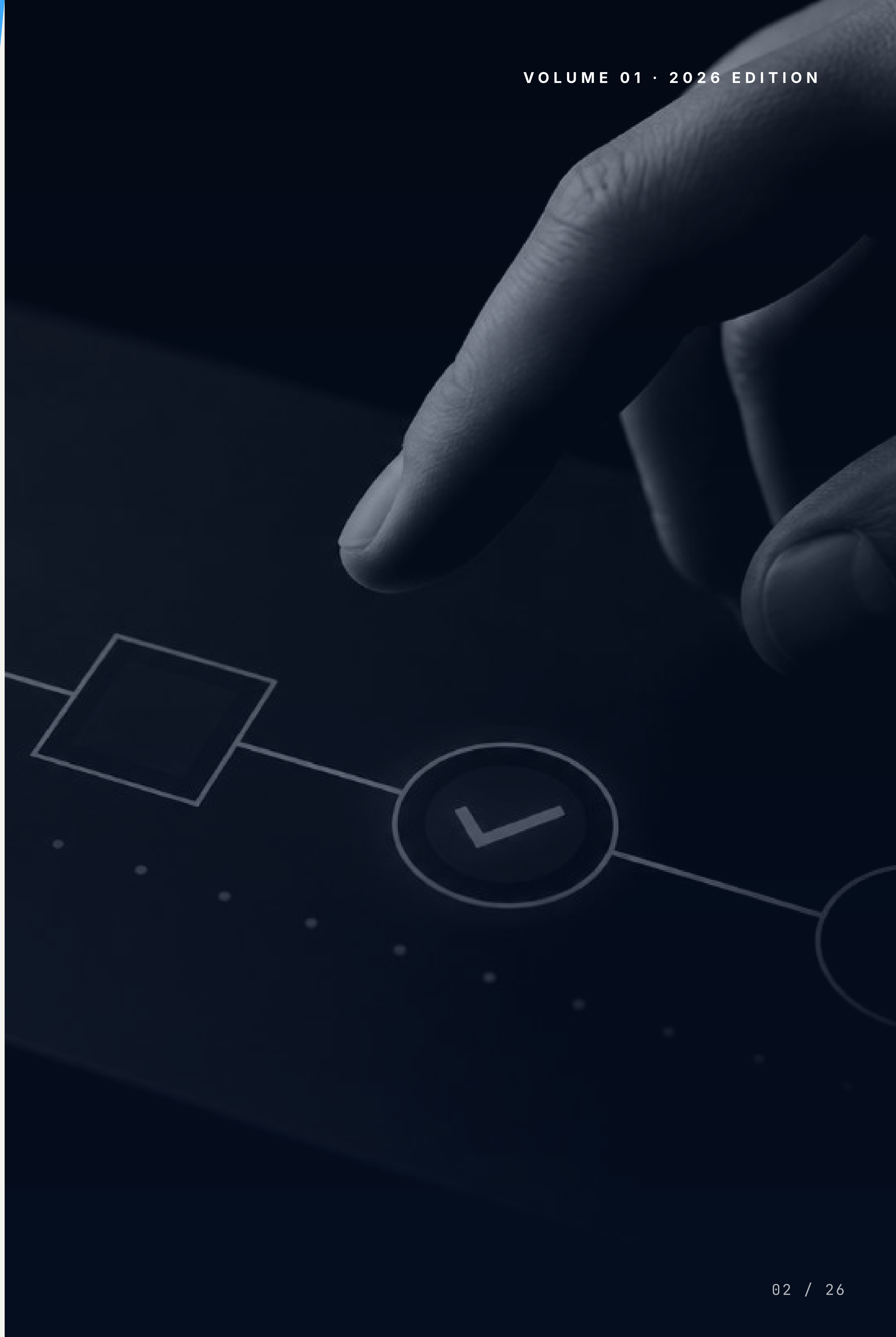
METHOD
Pollfish · n=100

FIELDED
Aug 5, 2026

2026

REPORT ROADMAP

Table of *contents.*



SOURCE · POLLFISH MARKETING OPS AI SURVEY · N=100 · AUG 5, 2026

"

*We didn't need another AI adoption stat. We needed to know why so many marketing teams are **busy with AI but not scaling it.***

CJ · Clear Strategy
FRACTIONAL CMO · GROWTH ADVISOR

A letter to *CMOs.*

Every founder we work with — DTC, wellness, Amazon, subscription — is *using AI every day.* Very few are getting a compounding return.

We commissioned this survey with Pollfish in August 2026 to put numbers behind what we've been seeing in the field. 100 marketing organizations. 420 questions. What came back is not another headline about adoption — it's a diagnostic. The gap between adoption (67%) and maturity (5%) isn't a technology problem, and it isn't a talent problem. It's an operating discipline problem.

The next 26 pages walk through what the data shows: where the speed gains are real, where they stall, and where fragmentation is quietly eating your margin. We close with the operating system we built to solve it — Nova Atlas OS™ — and how a fractional CMO engagement puts it to work on your business.

CS CLEAR STRATEGY

METHODOLOGY AT A GLANCE

100 marketing leaders. *420 questions.* Zero synthetic respondents.

100

RESPONDENTS

Marketing decision-makers across industries and org sizes

420

QUESTIONS ASKED

Strategy · creative · analytics · ops · governance · spend

6

DISCIPLINE AREAS

Adoption · Coordination · Tools · Spend · Governance · Priorities

1

FIELD DATE

All responses collected on Aug 5, 2026 — a same-day snapshot

PANEL

Pollfish random-sample

Verified marketing decision-makers screened by role & industry. Aggregate-only reporting.

INSTRUMENT

Structured questionnaire

Multi-select and single-select items on live practices — not aspirations. All figures respondent-reported.

CORROBORATION

Cross-refer

Headline findings triangulated against McKinsey, Gartner, BCG, and PwC 2025–2026 AI research.

THE CENTRAL FINDING

AI is *everywhere.* Almost nowhere is it *scaled.*

67%

ADOPTION

of organizations are *experimenting or using AI* across multiple marketing teams

the gap ↓ 62-PT MATURITY CHASM

5%

MATURITY

have AI that is *integrated, governed, measured, and continuously improved*

40%

FASTER CONTENT OR CAMPAIGN PRODUCTION

36%

IMPROVED CREATIVE QUALITY

46%

EXPERTISE STILL HELD BY INDIVIDUALS

48%

TOOL CHOICE DRIVEN BY PERSONAL PREFERENCE

> ***The headline gains are real — but they concentrate in acceleration, not transformation.*** Only 18% report better decision-making and 16% see improved knowledge sharing. Organizations are capturing surface-level efficiency before they've turned AI into deeper operating advantage.

SOURCE · POLLFISH · N=100 · AUG 5, 2026 · CORROBORATED BY MCKINSEY STATE OF AI 2025 (88% USE / 1% MATURE), BCG (25% CAPTURE VALUE), DELOITTE 2025 (8% GOVERNANCE)

CHAPTER ONE

Speed without *structure.*

AI is already producing visible efficiency gains — faster content, better creative, faster reporting. But the operating model needed to scale those gains hasn't caught up.

40% REPORT FASTER CONTENT OR CAMPAIGN PRODUCTION

5% HAVE FULLY INTEGRATED, GOVERNED, IMPROVED AI

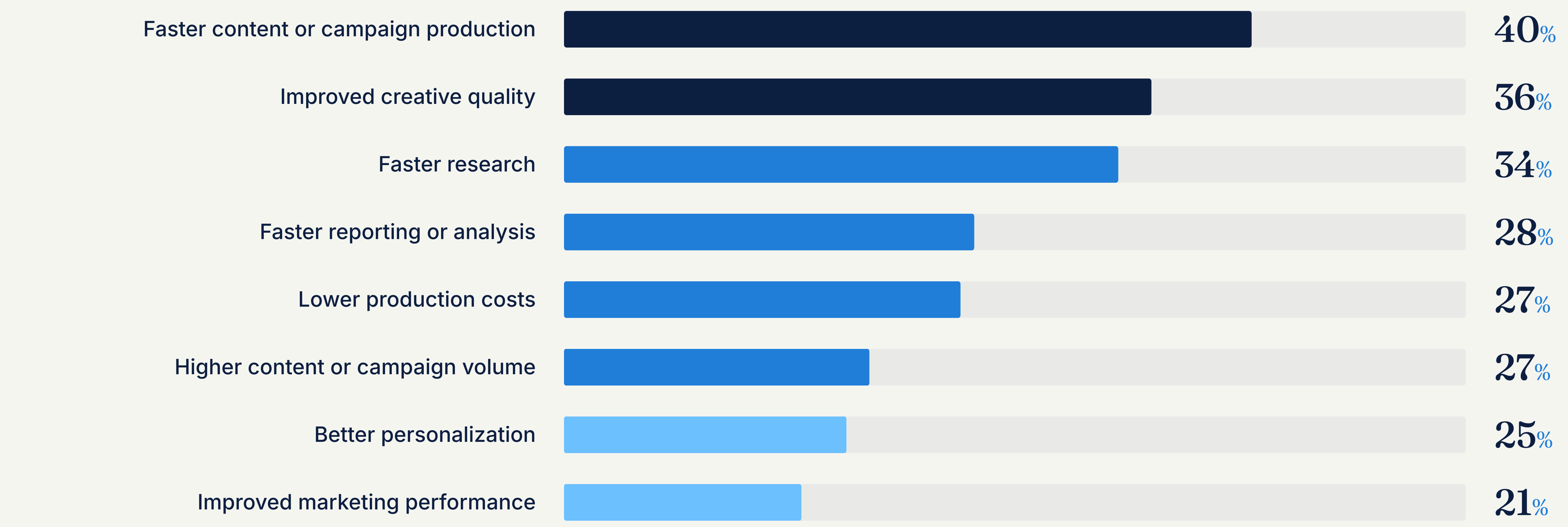
46% RELY ON INDIVIDUALS TO HOLD EXPERTISE

CHAPTER 01 · FINDING 01

The gains from AI are *real* — and they land in production, not decisions.

Asked which business impacts they've observed from AI use, marketers point to a consistent pattern: acceleration is winning by a wide margin over transformation. Faster content, better creative, faster reporting — the top four outcomes are all about throughput. The higher-order gains (better decisions, knowledge sharing, coordination) trail by 15–20 points.

REPORTED AI OUTCOMES · % OF RESPONDENTS N=100



THE READ

40%

FASTER PRODUCTION IS THE #1 REPORTED AI OUTCOME

For executives, this means AI is no longer a speculative productivity lever — it is already producing visible gains in throughput and execution quality. The question is whether those gains compound.

WHERE THE GAINS STOP

Gains concentrate in *acceleration.* Transformation trails by 20 points.

The organizational learning outcomes — the ones that compound — sit well below the production gains. Only 18% report better decisions, 18% see improved productivity, and 16% see improved knowledge sharing. AI is being used as a co-pilot, not yet as a system.

COLUMN A · WHAT'S WORKING

The *acceleration* wins

40%	Faster content or campaign production
36%	Improved creative quality
34%	Faster research
28%	Faster reporting or analysis

VS.

COLUMN B · WHAT ISN'T YET

The *transformation* gaps

21%	Improved marketing performance
18%	Better decision-making
18%	More consistent processes
16%	Improved knowledge sharing

SOURCE · POLLFISH · N=100 · AUG 5, 2026 · CORROBORATED BY GARTNER 2026 (4.8 HRS/WEEK SAVED, 72% FAIL TO REINVEST) & MCKINSEY QUANTUMBLACK 2025 (SALES & MARKETING CAPTURE 28% OF AI VALUE)

ADOPTION BY FUNCTION

AI expanded *horizontally* — faster than it matured vertically.

Marketing leadership (47%), creative (38%), content (36%), brand (34%), and product marketing (33%) lead adoption. Ops, analytics, and customer-facing functions trail — meaning AI has reached the drafting room faster than the operating layer.

Marketing Leadership	47%
Creative or Design	38%
Content or Copywriting	36%
Brand Strategy	34%
Product Marketing	33%
Executive Leadership	26%
Paid Media	24%
Video / Audio	22%
Marketing Operations	21%
Organic Social	20%
Website / Landing	18%
Consumer Insights	17%
Sales / Rev Ops	17%
Search / SEO / GEO	16%
CX / Success	15%

TIER 1 · LEADERS 33%+ · TIER 2 · ADOPTERS 26–34% · TIER 3 · EMERGING 20–25% · TIER 4 · POCKETS 15–19% · TIER 5 · TRAILING <15%

CHAPTER TWO

Knowledge stays *trapped.*

AI-related innovation is happening. Institutionalization is not. Effective prompts, workflows, and assistants are being invented — and quietly lost when the person who built them switches focus.

46%
EXPERTISE STILL HELD BY INDIVIDUALS

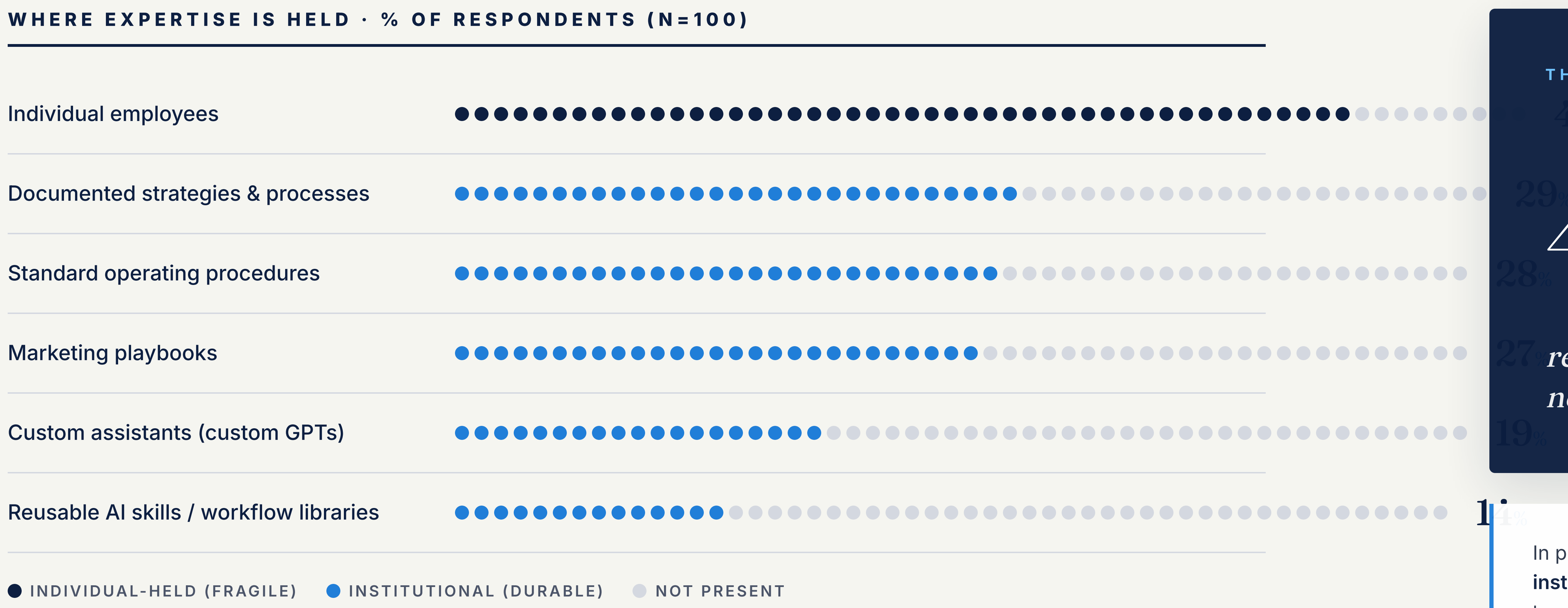
76%
USEFUL AI KNOWLEDGE LOCKED WITH INDIVIDUALS

43%
SHARING HAPPENS INFORMALLY IN SLACK / EMAIL

WHERE EXPERTISE LIVES

Marketing expertise is *personal, not institutional.*

Where marketing know-how actually sits — in people, or in documented systems? The survey asked. The answer is a fragility problem hiding in plain sight.



THE FRAGILITY

46%

rely on individual employees to hold marketing expertise — nearly twice the share holding it in any documented asset.

In practice: many organizations are scaling AI on top of expertise that is **personal rather than institutional** — which creates fragility when teams want repeatability, governance, and cross-team learning.

HOW AI KNOWLEDGE ACTUALLY SPREADS

From a good idea to *institutional asset* — 6 in 10 don't make it.

What happens when someone at your company builds an effective prompt, assistant, or workflow? Here's the actual funnel — from Slack chat to a governed, reusable capability.

STAGE 1
Someone develops an effective prompt / assistant / workflow

STAGE 2
Documented in a shared location

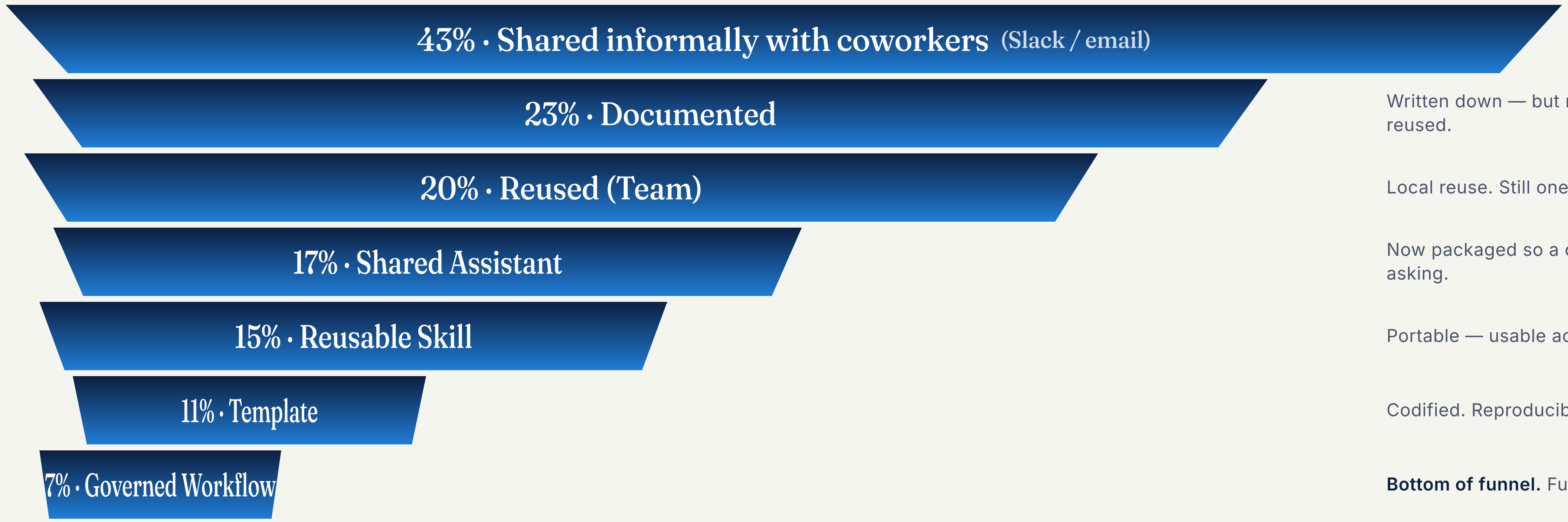
STAGE 3
Reused within the immediate team

STAGE 4
Becomes a shared assistant or custom GPT

STAGE 5
Becomes a reusable AI skill

STAGE 6
Becomes a template or playbook

STAGE 7
Becomes an approved automated workflow



Widest stage. Discovery is happeni talked about.

Written down — but not necessarily reviewed or reused.

Local reuse. Still one team, not the org.

Now packaged so a colleague can use it without asking.

Portable — usable across projects & teams.

Codified. Reproducible without the original author.

Bottom of funnel. Fully institutionalized.

THE READ

Innovation is happening. *Institutionalization is not.*

THE DROP-OFF

A *6× loss* from informal share to governed workflow.

THE BUSINESS COST

The best AI work in your org *isn't compounding.* It's evap

THE HIDDEN TAX

Weak coordination is *already* producing measurable waste.

Coordination gaps aren't theoretical — they're already producing duplicated work, inconsistent context, and preventable capability loss. These are the six ways the survey shows it happening at least sometimes across marketing teams.

LOCKED KNOWLEDGE

76%

say useful AI knowledge *remains with individuals — including 41% who say this happens often or very often.*

DUPLICATED WORK

68%

have *similar prompts or workflows recreated* at least sometimes — *28% often or very often.*

EXPERTISE LOSS

58%

lose AI expertise *when employees or agencies leave* at least sometimes.

REPEATED RESEARCH

58%

redo the same research at least sometimes.

CONTENT OVERLAP

56%

independently generate similar content or creative — *32% often or very often.*

CONFLICTING CONTEXT

51%

see conflicting versions of context flowing through prompts.

LEARNING NOT REUSED

50%

say campaign learning is not reused by other teams at least sometimes.

CLEAR STRATEGY

CHAPTER THREE

Tools without *discipline.*

Organizations aren't experimenting with a single platform — they're assembling multi-tool environments faster than they're setting rules for when each product should be used, or knowing what any of it costs.

64% USE CHATGPT FOR MARKETING

48% CHOOSE BY PERSONAL OR TEAM PREFERENCE

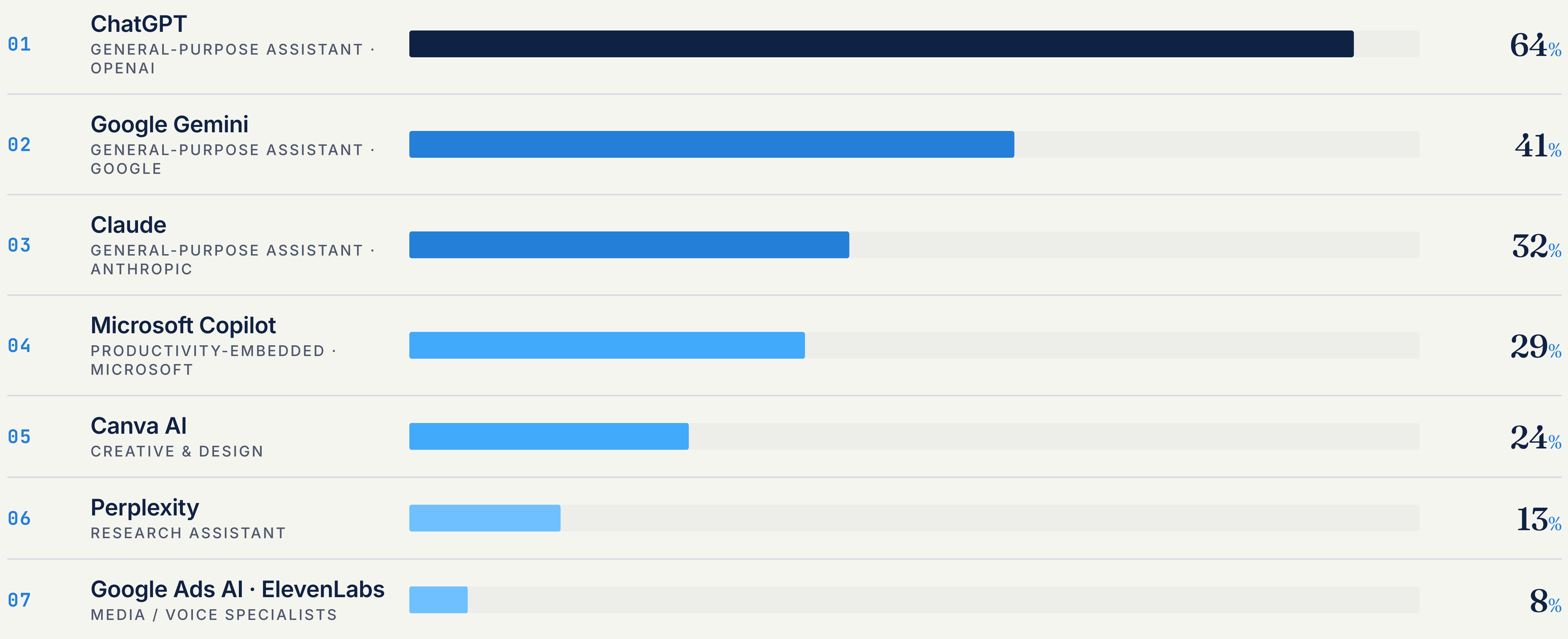
17% DON'T KNOW MONTHLY AI SPEND

THE AI STACK IN USE TODAY

Marketers are running *multi-tool environments* — not making a single-vendor bet.

Which AI products does your organization pay for or use for marketing? ChatGPT dominates, but 4 of the top 5 products are used by a quarter or more of respondents — meaning overlapping capabilities are the norm.

TOP AI PRODUCTS IN USE FOR MARKETING · % OF RESPONDENTS N=100



THE ONE-TOOL REALITY

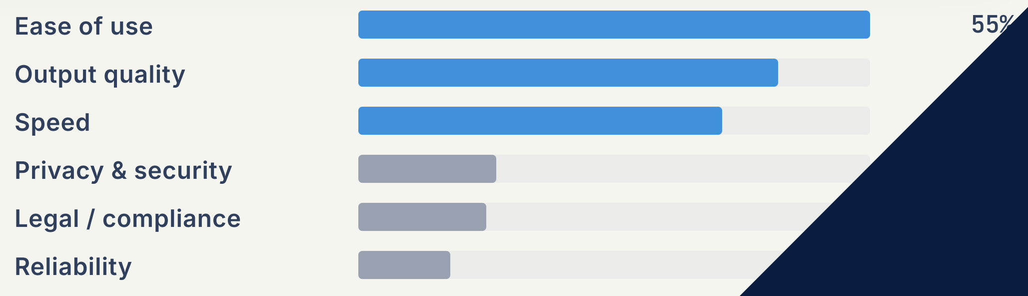
13%

Only 13% of respondents **primarily use one AI product for nearly every task.** The rest are switching between platforms without clear role definitions.

THE BUSINESS EFFECT

Overlapping capabilities across writing, ideation, research, and creative — with no shared rules for when to reach for which tool.

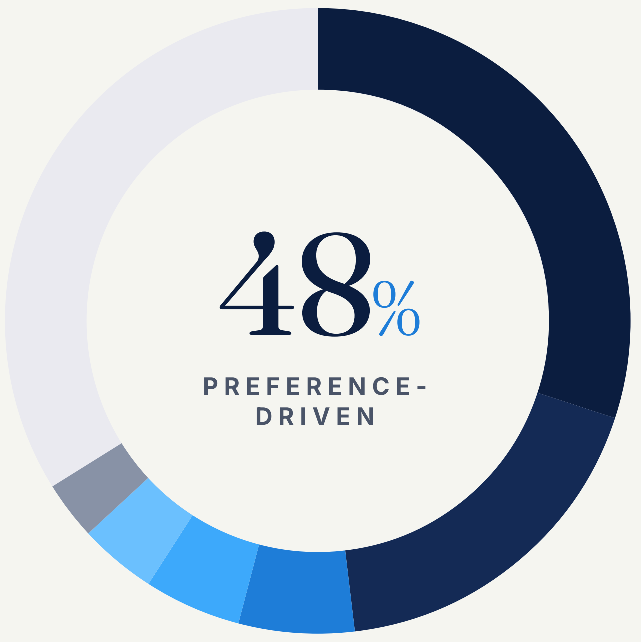
HOW THEY'RE CHOSEN · TOP SELECTION CRITERIA



HOW TOOLS ARE ACTUALLY CHOSEN

Product choice runs on *preference,* not portfolio strategy.

HOW AI PRODUCTS ARE CHOSEN · % OF RESPONDENTS



Employees use whichever product they prefer	30%
Each team chooses its own preferred products	18%
Formal mix of quality, cost, risk, data, task	6%
Approved product list	5%
Approved tools defined by function	4%
Products defined by task or use case	3%

PREFERENCE-DRIVEN VS GOVERNED SELECTION

PREFERENCE-DRIVEN (INDIVIDUAL + TEAM)

People pick the tool they like — *or their team does.*

48%

FORMAL CRITERIA: QUALITY · COST · RISK · DATA · TASK

A *structured evaluation* across the dimensions that actually matter.

6%

PRODUCTS DEFINED BY TASK OR USE CASE

The right tool for the right job — *a mature portfolio play.*

3%

THE VERDICT

8× more organizations pick tools by preference than by portfolio criteria. Broader adoption is *not automatically translating* into sharper portfolio decisions — it's translating into overlap.

SOURCE · POLLFISH MARKETING OPS AI SURVEY · N=100 · AUG 5, 2026

THE MONEY NOBODY CAN SEE

AI spend is *scattered.* Visibility is worse.

HOW AI SPENDING IS MANAGED · % OF RESPONDENTS

FRAGMENTATION	Distributed across cards, teams, agencies, platforms	28%
FRAGMENTATION	Each team tracks its own AI spending	21%
PARTIAL	Central budget owner exists	15%
PARTIAL	See subscriptions but not usage-based costs	14%
MATURE	Central visibility across nearly all AI spend	14%
BLIND	Little or no reliable visibility	8%
BLIND	Not sure who owns AI spend	9%

WHERE THE MONEY LEAKS · REPORTED INEFFICIENCIES

17%

of respondents **don't know what their organization spends** *on AI each month — the largest category tied for 1st with the $100–$499 bracket.*

26% **Premium models** used for routine tasks

26% **Same work regenerated** too many times

21% **Overlapping tools** providing similar capabilities

21% **Unnecessary individual** subscriptions

THE READ Waste is arising *both from tool overlap and from weak workflow control.* Only 14% of orgs can see nearly all their AI spend. The rest are managing it through vibes.

CHAPTER FOUR

Oversight without *ownership.*

Human approval is the leading control across every AI marketing activity — but most programs still depend on manual checkpoints rather than fully-designed governance systems with clear accountability and reliable auditability.

51%
HUMAN APPROVAL ON PAID-MEDIA ACTIVATION

11%
HAVE MATURE ROLE-BASED GOVERNANCE

5%
APPLY REQUIREMENTS CONSISTENTLY ACROSS TEAMS

THE ONLY GOVERNANCE EVERYONE TRUSTS

Human review is *everywhere.* Traceability lags 25 points behind.

Across every AI-touched marketing activity, human approval is the #1 control. Organizations are managing risk by keeping people in the loop — but review without a recorded decision trail is oversight, not governance.

HUMAN-APPROVAL REQUIREMENT BY ACTIVITY · % OF RESPONDENTS N=100

Paid-media campaign activation	51%
Customer-facing claims	50%
Legal, privacy, or compliance content	48%
Approval of prompts, assistants, AI skills	47%
Brand strategy or positioning changes	43%
Audience, bidding, or budget changes	40%
Creative or synthetic-media assets	35%

THE GAP INSIDE THE GAP

Review happens. *Recording it doesn't.*

50% Human approval on customer-facing claims

25% Same claims with *recorded, traceable* decisions

2× Review-to-traceability gap on the highest-risk work

THE AI GOVERNANCE MATURITY CURVE

Only *1 in 6* organizations has AI governance worth the name.

AI GOVERNANCE MATURITY DISTRIBUTION · % OF RESPONDENTS (N=100)

01	**Individual Discretion** Individuals decide with little formal oversight	17%
02	**Team-by-Team** Each team creates its own rules and practices	21%
03	**Informal Guidance** Informal org-wide guidance without policy	15%
04	**Written Policies (varying)** Written but applied inconsistently across teams	11%
05	**Central Foundation** Approved tools, uses, review requirements centrally defined	8%
06	**Role-Based & Traceable** Role-based authority, approvals, traceability, exceptions, ongoing review	11%
07	**Consistent Across Org** Requirements consistently applied across teams and channels	5%

DECENTRALIZED / BLIND **38%**
Governance is individual or team-by-team **— no shared standard.**

EMERGING MIDDLE **26%**
Informal guidance or written policies with **varying application.**

MATURE GOVERNANCE **16%**
Role-based OR consistent org-wide. The rest live somewhere in between.

SOURCE · POLLFISH · N=100 · AUG 5, 2026 · CORROBORATED BY DELOITTE STATE OF AI 2025 (8% COMPREHENSIVE GOVERNANCE) & PWC RESPONSIBLE AI 2025 (60% CITE RESPONSIBLE AI AS ROI DRIVER)

WHAT INFORMATION IS AUTHORITATIVE

Control-oriented info is *authoritative.* Learning-oriented info is *not.*

Which information is shared, current, and treated as authoritative? Legal & workflow rules are — but the assets that would help teams reuse learning and scale AI more effectively are still fragmented.

AUTHORITATIVE · SHARED & CURRENT

What organizations *protect*

Control-oriented information — the stuff that carries legal or workflow risk — is treated as source of truth.

Legal, privacy, compliance requirements	39%
Workflow, approval, decision rules	38%
Marketing calendar & launch timing	33%
Brand strategy, positioning, messaging	31%

NOT AUTHORITATIVE · FRAGMENTED

What they let *drift*

The knowledge assets that would let AI systems act on shared rules and learning — chronically underinvested in.

Approved prompts, assistants, AI skills	21%
Past campaign results and learning	19%
Customer research & insights	17%
Audience & customer definitions	16%

THE BUSINESS EFFECT

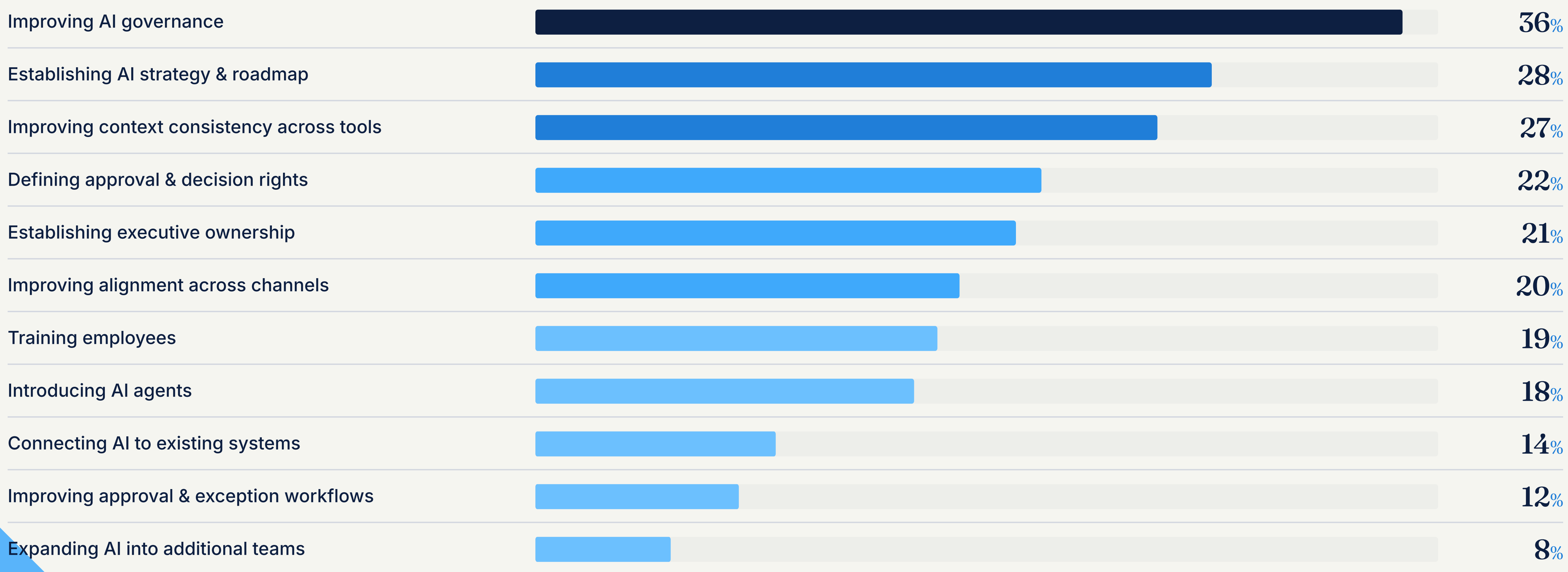
Organizations are *prioritizing control* over knowledge — which means AI systems can enforce policies your team wrote, but not the campaign learning your team paid for.

THE NEXT 12 MONTHS

The industry is *pivoting.* From expansion to *operating discipline.*

Asked to rank the top AI marketing priorities for the next 12 months, respondents chose governance, strategy, and context — the operating-model levers — over expanding AI into more teams. The market is telling itself what to fix next.

TOP AI MARKETING PRIORITIES · NEXT 12 MONTHS N=100



THE TOP 3 SAY IT ALL

36% **Governance**
Rules, oversight, traceability

28% **Strategy & Roadmap**
A plan, not a pile of experiments

27% **Context Consistency**
One source of truth across every tool

THE PIVOT *Governance · Strategy · Context* outrank *expanding AI into more teams* by *4×*. The market has stopped asking "where else can AI go" — and started asking "how do we make it work everywhere it already is." ↓

SOURCE · POLLFISH · N=100 · AUG 5, 2026 · CORROBORATED BY BCG 2025 "CLOSING THE AI IMPACT GAP" (2/3 OF TOP MARKETING LEADERS EXPECT HIGH-LEVEL DISRUPTION) & GARTNER 2025 (CMO BUDGETS FLAT AT 7.7%)

CLEAR STRATEGY · THE DIAGNOSTIC

First, we tell you *exactly where you are* on the curve.

Every marketing organization is at one of five stages of AI maturity. Most don't know which. Clear Strategy's diagnostic maps you against the survey benchmarks in 2 weeks — so the decision about where to invest next is grounded in data, not in vibes.

STAGE 01

Individual

AI used independently by individuals with little organizational visibility. Innovation happens; institutionalization doesn't.

12%
OF ORGS

STAGE 02

Team-Isolated

Teams use their own tools and practices with little coordination between them. Duplicated work is quietly compounding.

20%
OF ORGS

STAGE 03

Multi-Team, *Inconsistent*

Multiple individuals or teams use AI but practices vary. The largest single cohort — and the one most vulnerable.

29%
OF ORGS

STAGE 04

Coordinated

AI coordinated through shared systems and processes. The first stage where value starts to compound.

9%
OF ORGS

STAGE 05

Integrated & *Governed*

AI is broadly integrated, governed, measured, and continuously improved. The 5% delivering compounding returns.

5%
OF ORGS — TARGET STATE

CS DIAGNOSTIC — 2 WEEKS

We map your organization against the 420-item survey framework and produce a stage rating, the specific gaps that hold you at that stage, and the *3–5 moves* that shift you up one level.

STEP 1 OF 3

PROPRIETARY TO CLEAR STRATEGY

The operating system for *scalable AI marketing.*

Nova Atlas OS™ closes the gap between adoption and impact by turning every fragmentation problem this survey found — Knowledge, Coordination, Tools, Governance, and Context — into a single connected discipline.

01 · KNOW	02 · COORD	03 · STACK	04 · GOVERN	05 · CTX
Knowledge Core	Coordination Layer	Stack Discipline	Governance Grid	Context Engine
CH.1 · EXPERTISE	CH.2 · HANDOFFS	CH.3 · TOOLS	CH.4 · CONTROLS	CH.5 · ALIGNMENT

CLEAR STRATEGY · THE PARTNERSHIP

A fractional CMO with *operating skin in the game.*

Clear Strategy is not a consultancy that hands you a deck and leaves. We run the diagnostic, install Nova Atlas OS™, and stay embedded as your fractional CMO through the 90 days that matter — until the operating model runs itself.

THE 90-DAY ENGAGEMENT

01 — DAYS 1–14 — Diagnostic & *Baseline*

Map your organization against the 420-item survey framework. Interview leads. Audit spend & stack. Deliver stage rating + gap-close roadmap.

Interviews · Stack audit · Spend audit · Stage rating

02 — DAYS 15–60 — Nova Atlas OS™ *Installation*

Stand up the 5 modules — Knowledge Core, Coordination Layer, Stack Discipline, Governance Grid, Context Engine — with your team.

Playbooks · Governance grid · Prompt library · Approved stack

03 — DAYS 61–90+ — Fractional CMO *Cadence*

Ongoing operating rhythm — weekly reviews, monthly leadership sessions, quarterly re-diagnostics. Nova Atlas stays with you.

Weekly reviews · Leadership syncs · Quarterly rediagnostic

WHO THIS IS BUILT FOR

$5M – $150M consumer brands scaling on real AI.

Clear Strategy works with founders and CMOs of DTC, Amazon, wellness, subscription, and creator-led consumer brands — the ones already spending on AI without yet compounding it.

- $5M–$150M revenue · scale-up phase
- Marketing team of 3+ using AI daily
- Multiple AI tools already in the stack
- Board pressure to prove AI ROI
- Ready to install operating discipline

SOURCES & METHODOLOGY

The findings, *triangulated.*

Every claim in this report is grounded in Clear Strategy's original 100-respondent, 420-question field study. Where the pattern is also confirmed by leading independent enterprise studies, we've cited them inline alongside the finding. The full corroborator set is below.

PRIMARY DATA

Clear Strategy · State of AI in Marketing 2026

Field study of *100 marketing decision-makers* · 420 items · Fielded via Pollfish · *August 5, 2026.*

ADOPTION VS SCALE

McKinsey · State of AI 2025

88% use AI · 1% report maturity. Referenced for the adoption-vs-scale paradox (slide 05).

VALUE CAPTURE

BCG · Closing the AI Impact Gap 2025

Only ~25% of enterprises captured ***measurable AI value.*** 2/3 of top marketing leaders expect high-level disruption.

GOVERNANCE

Deloitte · State of AI in the Enterprise 2025

88% used AI in 2025; only ***8% maintain comprehensive AI governance.*** Corroborates the 11% mature-governance finding.

RESPONSIBLE AI

PwC · Responsible AI Survey 2025

60% of execs say Responsible AI drives ROI; 55% cite CX/innovation gains. Confirms the governance-as-value link.

TIME REINVESTMENT

Gartner · AI in Sales & Marketing 2026

AI saves sellers ***4.8 hrs/week;*** 72% of sales orgs fail to reinvest the time in high-value work.

TOOL SPRAWL

IDC · Enterprise AI Deployment 2025

Enterprise AI tool deployments projected to grow ***+150% from 2025–2027.*** Supports the tool-stack fragmentation finding.

AGENTIC ENTERPRISE

MIT Sloan Management Review 2025

35% adoption of agentic AI, 44% planning to deploy. ***76% of AI capabilities remain personal to the individual employee.***

A NOTE ON METHODOLOGY

Third-party citations are *independent corroboration only* — none contributed data to the Clear Strategy findings. Every percentage in this deck labeled *n=100* comes from the Clear Strategy field study.

PRODUCTION NOTE

AI usage, *authorship*, and governance

AI-ASSISTED PRODUCTION

This presentation was produced with **AI tools and human review.** All strategy, findings, and interpretations were authored and approved by **CJ Coffaro and Clear Strategy** under our governance, scope, and review process.

Survey data is **original primary research** — fielded via Pollfish, n=100, August 5, 2026. Third-party studies appear only as independent corroboration and contributed no data to these findings.

> All factual statements carry immediate on-slide citations.

GOVERNANCE & REVIEW

Interpretations are labeled as **Clear Strategy interpretation.** Hypotheses are marked as items **to validate** — not presented as conclusions. This deck represents our professional assessment based on the evidence gathered.

AUTHOR
CJ Coffaro
Founder & Operator

ORGANIZATION
Clear Strategy

DATE
August 2026

VERSION
v1.0

EDITORIAL STANDARDS

- All claims carry *immediate on-slide citations*
- External research is verified and named at the point of use
- Survey data is attributed to its *field date and sample*
- Interpretations are clearly labeled as interpretation
- Nothing on these slides comes from model memory

CS CLEAR STRATEGY

END OF REPORT · THE INVITATION

Close *the gap.*

Move from the 62% who are experimenting to the 5% who compound. The next Clear Strategy diagnostic starts in two weeks — and Nova Atlas OS™ is available to the first cohort of founding partners.

BOOK A DIAGNOSTIC →

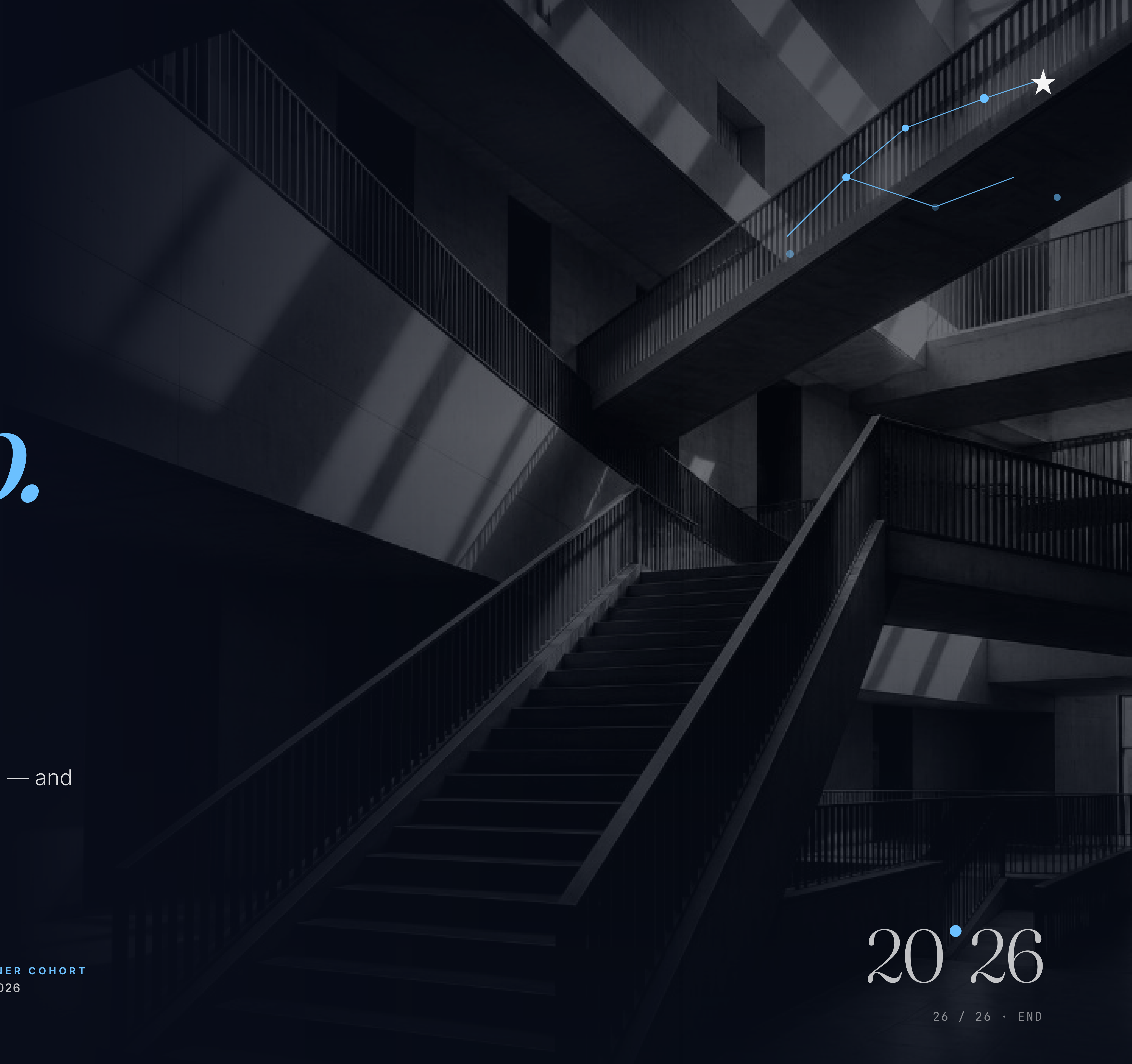
CLEAR-STRATEGY.COM/ASSESSMENT

CONTACT
CJ · Clear Strategy

SITE
clear-strategy.com

NOVA ATLAS OS™
clear-strategy.com/NovaAtlas

FOUNDING PARTNER COHORT
Open · Aug – Oct 2026



2026