The State of Martech & Marketing Operations Report

LXA

INTENT HQ

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Welcome

Welcome to the 2025 State of Martech, AI & Marketing Operations edition, now the 4th annual edition. I'm Carlos Doughty, CEO of LXA, and I'm delighted to introduce this year's report — a deep dive into one of the most transformative periods our industry has ever seen.

Each year, the martech landscape shifts. New tools emerge. Expectations rise. Roles evolve. But 2025 marks something different: a moment when marketing is being redefined—by AI, data, and the acceleration of digital transformation across every function. What we're witnessing is not just technological change but a structural shift in how marketing operates, delivers, and creates value.

This report is based on the voices of hundreds of senior marketing and tech leaders worldwide. It reflects not only where we are today but also where we're heading and what it will take to succeed. It also reflects the strategic insights of our research partner, Intent HQ which have a wealth of experience in martech, data driven marketing and transformation.

Whether you're a CMO navigating AI integration, a marketing ops leader re-architecting the stack, or a martech practitioner scaling new capabilities, I hope this research brings you clarity, challenge, and a few sparks of inspiration.

Because the future of marketing isn't arriving tomorrow. It's being built today by people like you.

Carlos Doughty, CEO & Course Instructor, LXA

Foreword

The marketing landscape stands at an extraordinary crossroads. As AI, customer data, and digital ecosystems rapidly reshape our world, it is no longer enough for businesses to simply keep pace. Success belongs to those who anticipate change, act with precision, and above all, see their customers not as data points, but as individuals with distinct needs, desires, and intent.

At Intent HQ, we believe that empathy, grounded in intelligence, will define the next era of marketing leadership. In a world awash with tools and technologies, what separates the winners is not the size of their stack but the depth of their understanding. Our purpose is clear: to equip businesses with the ability to predict, personalise, and engage in meaningful, respectful, and profoundly human ways.

This State of Martech 2025 report reveals a sector in flux — at once buoyed by innovation and challenged by complexity. It shows that AI agents are no longer a future ambition; they are reshaping teams today. It uncovers how Return on Time, not just Return on Investment, is becoming the critical measure of success. It reminds us that orchestration, privacy, and contextual intelligence are now the pillars of high-performance marketing operations.

Above all, it underscores a critical truth: customer-centricity without real customer understanding is a hollow promise. To thrive, brands must move beyond assumptions and averages. They must embrace the full richness of their customers' lives and behaviours — activating insights with speed, at scale, and always with trust at the core.

At Intent HQ, we are proud to help our partners unlock this future. Through pioneering AI and privacy-first data enrichment, we enable businesses to transform trillions of irrelevant interactions into billions of vibrant, authentic experiences.

Jonathan Woolf
Chief Revenue Officer
Intent HQ

As you read this report, I invite you to view it not simply as a snapshot of the industry but as a call to lead, to invest in insight, to empower your teams, and to act with foresight and intent.

Because in 2025 and beyond, marketing excellence will be measured not by how loudly we speak, but by how clearly we understand.

Methodology

To provide a rich and deep review of the state of sales enablement, the report methodology involved three main phases:

- **Phase 1 |** Desk research to review some of the most recent and relevant literature that explores themes relating to sales enablement and technology.
- **Phase 2 |** Qualitative research, in-depth interviews with various senior client-side, agency and vendor marketing leaders across multiple sectors.
- **Phase 3 |** An online survey of 201 respondents was conducted during March-April 2025. All respondents were Chief Marketing Officers (CMO) or equivalent from organisations with revenues of £150m+ cross-industry. Respondents were from North America (20.9%), the UK (34.3%), Europe (19.9%), the Middle East and Africa (10.0%), and Asia Pacific (14.9%).

This report also contains commentary from respondents interviewed by LXA. Special thanks to Allego, the report partner, who worked collaboratively with the research team at LXA on its development.

LXA would like to thank the following people for their contributions to this report:

Carlos Doughty
CEO & Course instructor
LXA

Jonathan Woolf
Chief Revenue Officer
Intent HQ

Marco Andre
Executive Director - Global Marketing & AI Excellence
Novartis

Sharon Braude
Director Marketing Operations, Planning & Insight
Red Bull

Henk-jan Brugge
Head of Marketing Technology, Digital CoE
Philips

Hazem El Taha
Global Head of Marketing Technology
HSBC

Jim Gow
Director Marketing Technology
Globe Telecom

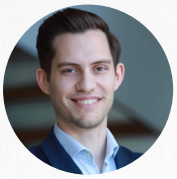
John Hardy
SVP of Marketing Technology
Association of National Advertisers

Parry Malm
Former CEO and Founder
Phrasee (now Jacquard)

Ravi Naramsetty
Head of Martech
Telia Company

David Raab
Founder
CDP Institute

Carmina Santos Alvaro
Global Commercial Data Strategy, Associate Director
Sanofi



Charel Schmidt
Regional Biddable Media Lead
Mars

Jed Waddington
Director of Marketing Technology
Bright Horizons

Rachael Smith
Managing Director
LXA

Denise Edwards
Senior Group Manager Marketing Capabilities
TD

Executive Summary

The State of Martech 2025 report reveals a discipline at an inflection point. AI is accelerating the pace of innovation and redefining the way marketers work. Tech stacks are becoming more intelligent, composable, and orchestrated. Teams are evolving — and so are the expectations placed on them.

Based on a global survey of senior marketing and technology leaders, this report maps the key shifts reshaping martech and offers a strategic lens on how organisations can turn growing investment into meaningful business impact.

Key Findings

1. Martech budgets continue to grow, now representing 31.4% of the total marketing budget, with AI and automation driving spend, even as labour allocation declines year over year.

2. CMOs are doubling down on performance measurement, with 73% now reporting a clear and accurate view of martech effectiveness. Notably, Return on Time (ROT) has emerged as a leading metric, reflecting the growing importance of efficiency and speed.

3. The average enterprise stack now comprises 62 tools, and 86% of CMOs favour a best-of-breed approach. However, integration complexity, talent shortages, and underutilisation remain key challenges.

4. AI agents are beginning to reshape team structures and workflows. 70% of CMOs believe they will be transformative, and over a third expect them to replace up to half of marketing roles within two years.

5. Data quality and activation remain major hurdles. Despite the rise of CDPs and data orchestration platforms, 61% of organisations still struggle to use their data effectively.

6. The marketer's role is evolving, with growing demand for AI, analytics, orchestration, and prompt engineering skills. Yet, 32% of CMOs say a lack of internal talent is holding them back.

7. Looking ahead, agent-led orchestration, AI-native tools, and composable architecture are expected to drive the next wave of innovation. Privacy, ethics, and governance will shape how that future unfolds.

A Strategic Crossroads

As the pace of change accelerates, organisations face a clear choice: adapt or fall behind. Those who succeed will do so by aligning strategy with technology, empowering cross-functional teams, and making data and AI work harder and smarter.

This report offers a roadmap — grounded in real-world data and industry benchmarks — to help marketing leaders navigate complexity, invest wisely, and orchestrate for impact.

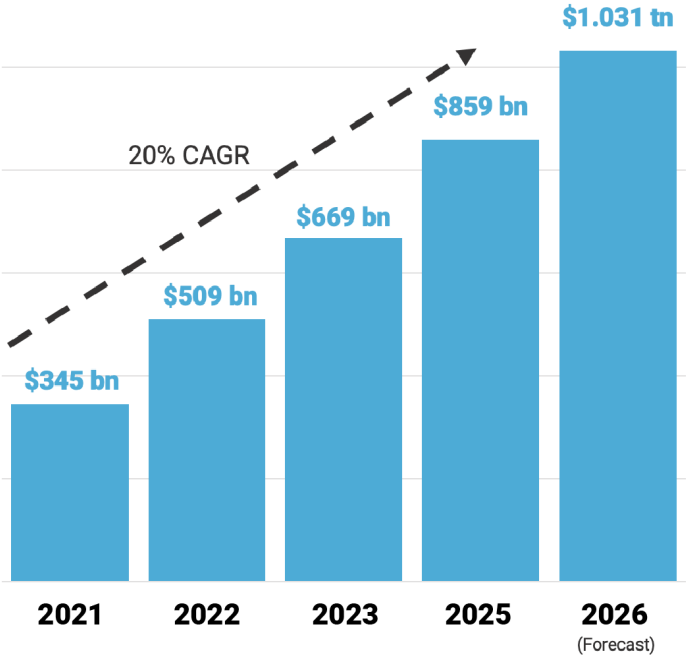
State of Play

Marketing technology has moved from the periphery of business to its core. In 2025, martech is a central engine for competitive advantage, customer experience, and operational agility. This year's research reveals a clear shift in mindset: 84% of CMOs say advancing AI, marketing, and martech capabilities is critical to business performance.

Amid economic pressures and tighter discretionary spending, martech investment has remained resilient. In fact, it's accelerating. Martech now represents 31% of the total marketing budget, growing at a compound annual rate of 6% over the past five years. While many organisations have reduced headcount spend, they've redirected resources toward automation, orchestration, and intelligence — the areas where martech delivers measurable

Market Growth

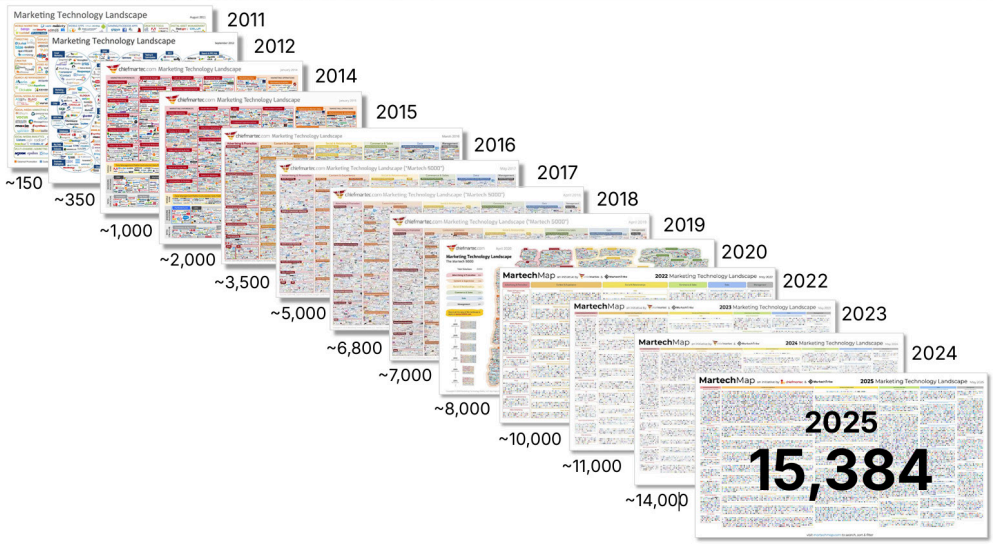
The global martech and salestech market is now valued at **$859 bn, up from $669 bn in 2023 - a 27% increase**. And a CAGR increase of 20% in the last 5 years. This trajectory suggests the market will surpass the trillion dollar mark next year. The scale of growth is astronomical. The most recent growth and what is coming next is fuelled by a wave of AI innovation. the race to deliver expectational CX at scale, and sustained investment in digital transformation for an increasing digital world.



Note: The approximation of market sizing has been calculated using WARC's ad spend data and LXA's survey response data on marketing budget spend split by percentage (across martech, staff, agency/services and media). The methodology assumes ad spend is a proxy for marketing communication spend, which combines media and agency costs. And the survey

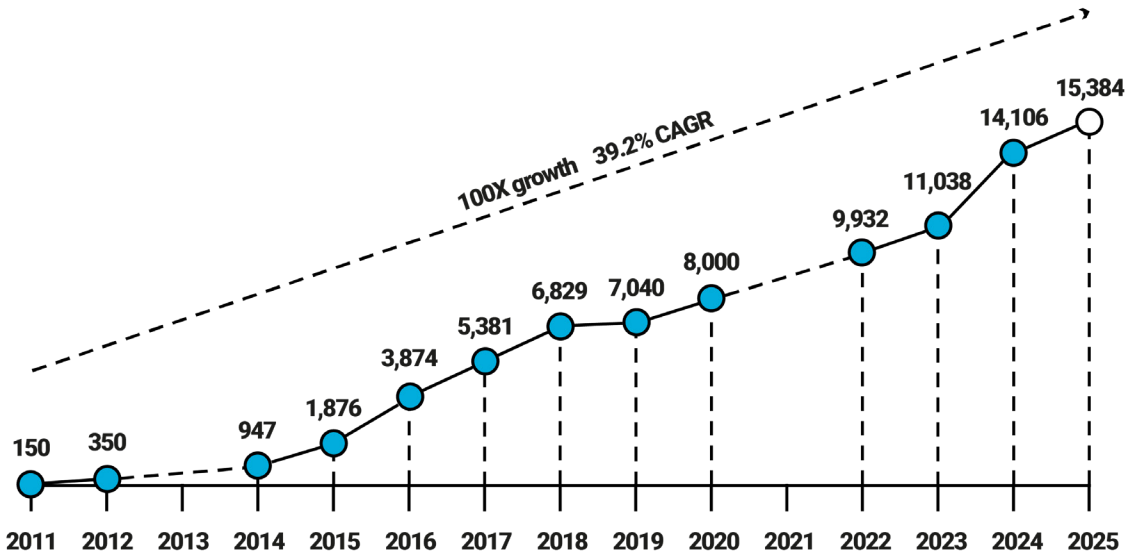
responses are typical globally. This reflects how modern marketing is changing, and any discrepancies in how media and agency spend is attributed. The sizing has been independently substantiated against a series of methodologies and data points, including martech company public revenues, market sizing of key martech categories, M&A martech activity and martech landscape growth.

CMOs are also contending with a rapidly expanding vendor ecosystem. The number of martech solutions has grown from approximately **11,000 in 2023** to over **15,000 in 2025**.



Source: chiefmartec.com

Growth of the Martech Landscape
2011 - 2025

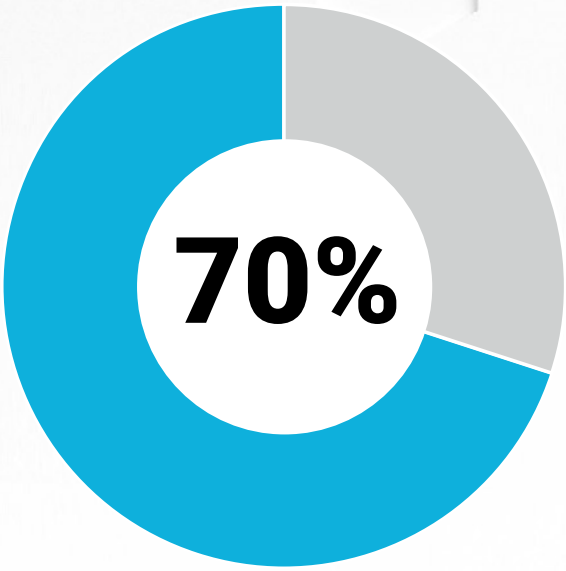


The average enterprise stack now includes 62 tools, up from 56 in 2023. And the prevailing strategy is clear: 86% of CMOs prefer best-of-breed over all-in-one solutions, building modular, composable stacks tailored to their specific customer journeys.

This demand is reflected in the capital markets. Martech and AI investment activity rebounded strongly in late 2024 and Q1 2025, with a string of M&A and funding announcements:

- **Publicis Groupe** acquired **Lotame**, the last major independent data management platform.
- **Braze** acquired AI decisioning engine **OfferFit** in a $325M deal.
- **Rokt** acquired **Mparticle** CDP for $300M, merging ad tech with martech.
- **Contentstack** bought CDP platform **Lytics**, adding depth to its composable DXP offering.
- **Zeta Global** enhanced its identity graph through a $250M acquisition of **LiveIntent**.
- **Uniphore** acquired **ActionIQ** and **Infoworks**, extending its AI-powered marketing cloud.
- **DemandScience** merged with **Terminus**, creating a scaled ABM and intent data platform.
- **Getty Images** and **Shutterstock** announced a $3.7B merger, consolidating the visual content ecosystem.
- Investment momentum continued with raises from **Hightouch** ($80M), **StackAdapt** ($235M), **Amplience** ($40M), **Attention** ($14M), **Synthesia** ($180M), **Writer** ($200M), **Nooks** ($43M), and most notably **Insider** ($500M).

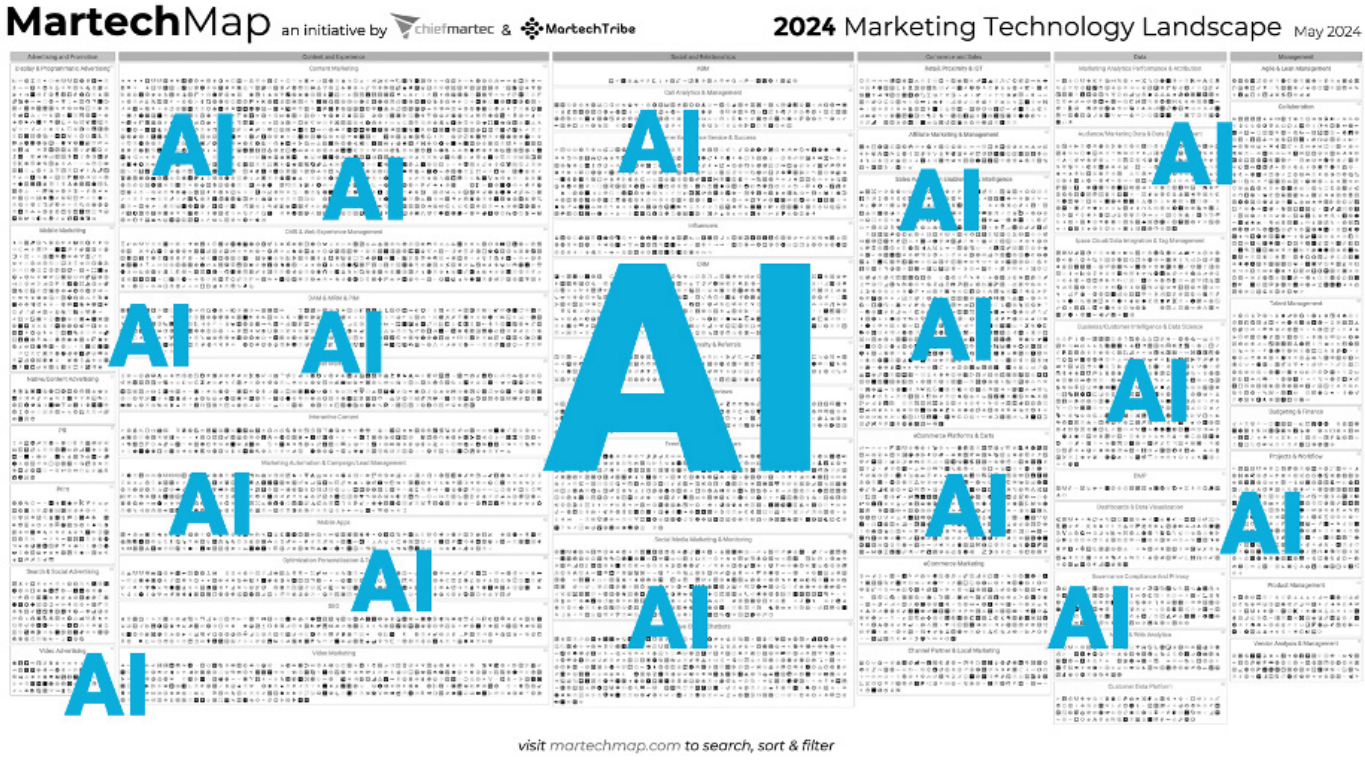
This wave of dealmaking suggests a growing investor confidence in the martech category.

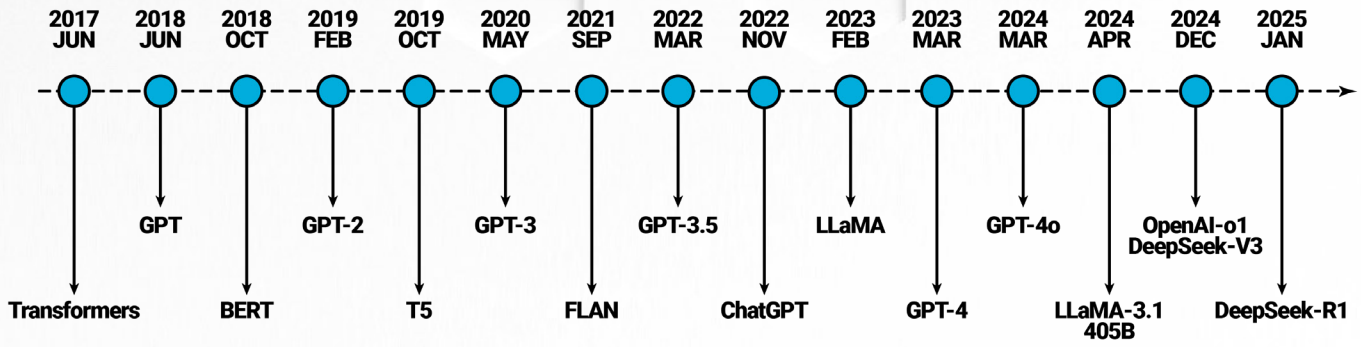


70% of CMOs view AI agents as one of the most transformative technologies marketing has ever seen.

The AI Inflection Point

AI is no longer on the fringe of marketing strategy—it's embedded in the core stack. From personalisation and predictive analytics to campaign automation and content generation, AI is reshaping what's possible in every layer of the funnel.





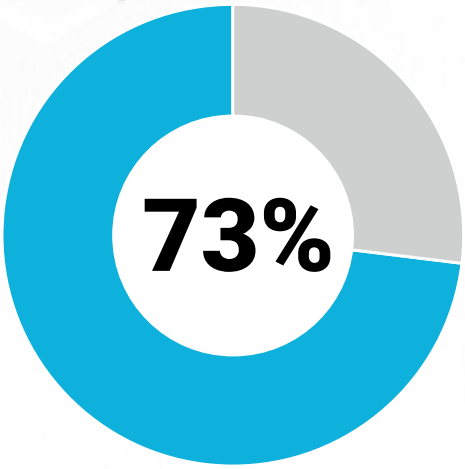
This year's data shows that 70% of CMOs view AI agents as one of the most transformative technologies marketing has ever seen. These agents aren't just augmenting workflows — they're beginning to replace entire processes, with 38% of CMOs predicting that 16–50% of current marketing roles will be replaced or restructured by AI agents within 24 months.

The timeline for LLM development shows the breakneck speed of innovation: OpenAI's successive updates, the launch of Grok by xAI and DeepSeek's open-source model, and dozens of enterprise-grade LLMs entering the market.

This momentum is translating directly into marketing operations — from autonomous campaign generation to predictive journey orchestration. The evolution of large language models (LLMs) over the past five years has been nothing short of transformative.

What began in 2018 with basic text processing has rapidly advanced to multimodal generative AI by 2023–2024, capable of reasoning, creating content across formats, and operating with remarkable speed, efficiency, and accessibility. This acceleration has reshaped content creation, operational workflows, marketing activation, insight and analytics, marking a fundamental shift in how brands generate, scale, and personalise experiences.

CMOs are doubling down on performance measurement, with 73% now reporting a clear and accurate view of martech effectiveness.



The Data-Driven Recalibration

Despite major strides in tooling, data management remains one of the most persistent challenges in martech. Many organisations still struggle with fragmented systems, inconsistent taxonomy, and underutilised CDPs.

One area generating growing interest is synthetic data—artificially generated datasets designed to mirror real-world behaviours without exposing personal information. As AI models require vast and diverse datasets to train effectively, synthetic data offers a privacy-safe alternative that sidesteps regulatory constraints while preserving analytical accuracy. While adoption is still in its early stages, its potential to power everything from personalisation to predictive modelling without risking compliance makes it one of the most closely watched trends in the martech and AI landscape. In the years ahead, we may see synthetic data underpinning everything from campaign simulations to training AI agents in controlled, ethical environments.

At the same time, new privacy challenges are emerging. AI's hunger for training data collides with growing regulatory scrutiny. In one high-profile protest, a coalition of newspapers aligned to print identical front pages, calling for protection against AI scraping and copyright infringement. CMOs now face a delicate balancing act: unlocking the power of contextual AI, while respecting consent, governance, and evolving global legislation.

A More Complex Buying Process

With martech maturity comes procurement complexity. Buyer committees have expanded and now typically include stakeholders from marketing, IT, data science, compliance, and finance. 69% of CMOs cited that the buyer committee for the average AI marketing / martech / data marketing initiative or tool has increased in the last 12 months. Deal sizes are larger, implementation timelines longer, and expectations higher. ROI must be proven, and quickly.

Encouragingly, 73% of CMOs report having clear and accurate measures of martech effectiveness. Increasingly, leaders are going beyond traditional ROI and embracing Return on Time (ROT) — a metric that reflects gains in speed, automation, and operational efficiency.

The Year Ahead

Looking ahead, marketing leaders must operate in a dual mode: experimenting at the edge while standardising at the core. AI capabilities will continue to push the boundaries of what's possible, but without robust data governance, integration, and talent strategies, tech alone won't deliver results.

The takeaway is clear: 2025 is not about more tools. It's about better orchestration, stronger signals, and strategic activation. Martech isn't just keeping pace with business—it's setting it.

Martech Maturity

As marketing technology cements itself as a core business function, so too has the sophistication of how organisations plan, resource, and execute against it. LXA's martech maturity framework — grounded in the 5Ps of Planning, People, Platforms, Process and Pioneer — offers a longitudinal view into how well businesses are building the capabilities required to turn martech into marketing performance.

Planning and Strategy | The extent to which your organisation's martech strategy, initiatives and roadmap align to your customers' journey & business goals

People and Teams | The extent to which your organisation is well-resourced to deliver martech initiatives. And the extent to which your organisation can support martech expertise development, recruitment, agency selection and training

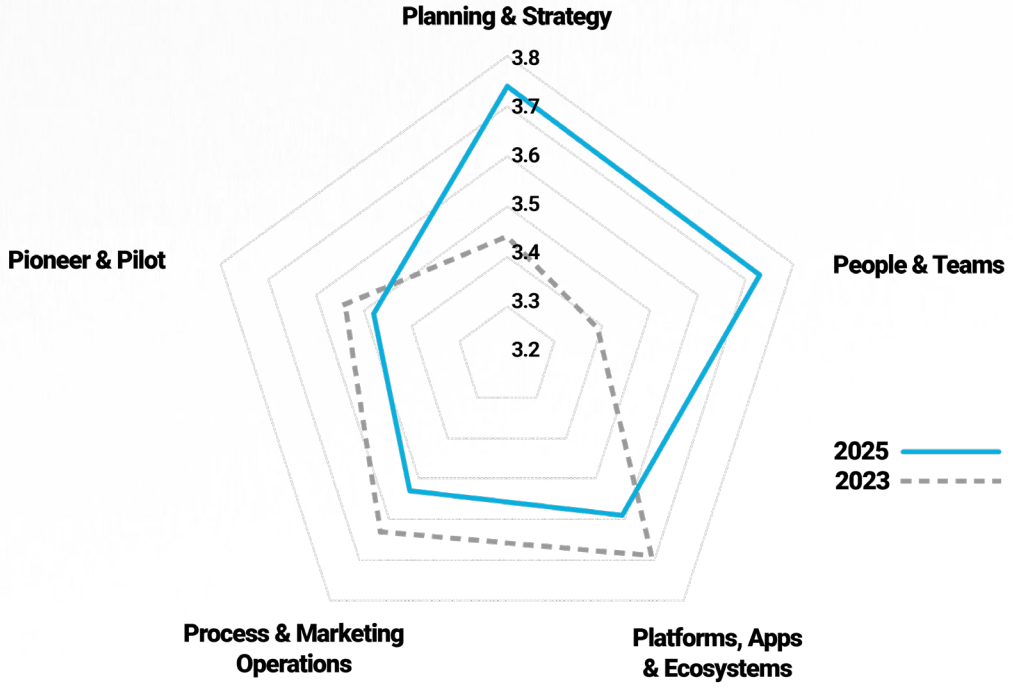
Platforms, Apps and Ecosystems | The extent to which your organisation has the tools needed to deliver the strategy. As well as the level to which the marketing stack is integrated and tools are adopted by the team. And the extent of the information security policies and procedures that are in place for setting up and managing martech tools

Process and Marketing Operations | The extent to which your organisation has the marketing and data governance, communication, collaboration and workflows, campaigning, analytics and measurability, vendor analysis, selection & management and programme and project management, underpinning its martech activities

Pioneer and Pilot | The extent to which your organisation is up to date on market trends, able to react to changes in customer behaviour, able to assess and experiment with new technologies, and has the agility to adapt rapidly to new challenges

This year's data shows continued upward momentum across all five pillars. 2025 marks the highest average maturity levels recorded to date, driven by investment in skills, better strategic planning, and greater integration between systems and teams.

But progress is not without its friction. CMOs cite persistent challenges around data management, internal alignment, and change resistance, signalling that maturity is as much about culture and process as it is about technology.



Planning & Strategy

2025 score: 3.74 (up from 3.44 in 2023)

Organisations are becoming more deliberate and strategic in how they plan martech investments. The 9% uplift in maturity here reflects a stronger connection between martech roadmaps and business goals, as well as clearer financial planning. Mature businesses are mapping martech initiatives directly to customer journey needs, with dedicated frameworks and documented impact models becoming more commonplace.

People & Teams

2025 score: 3.73 (up from 3.39 in 2023)

Skills development is finally catching up with stack expansion. The 10% uplift from 2023 shows how organisations are responding to capability gaps through in-house upskilling (38%) and recruitment (33%). This aligns with a spike in demand for certified martech and AI marketing training. Yet, the people pillar remains a pressure point — 39% of CMOs still cite lack of skill or knowledge as a barrier, and 31% say they simply don't have the staff to move faster.

Platforms, Apps & Ecosystems

2025 score: 3.69 (up from 3.59 in 2023)

The modern stack is broader and deeper. Organisations now manage an average of 62 martech tools, up from 56 in 2023. Investment in tools has also grown, with martech now accounting for 31.4% of the total marketing budget, up from 23% in 2021 — a 6% Compound Annual Growth Rate (CAGR). This increase in platform maturity also reflects a growing focus on integration, security, and adoption. Still, 54% of CMOs cite integration as a top challenge.

Process & Marketing Operations

2025 score: 3.63 (up from 3.53 in 2023)

As stacks become more complex, operational maturity has had to follow. The increase here is linked to investment in governance, campaign planning, analytics, and vendor management. In fact, those citing governance as a maturity barrier dropped sharply from 40% in 2023 to just 14% this year. The demand for LXA's marketing operations training also supports this upward trend — a reflection of broader awareness that martech maturity is not purely technical; it's deeply procedural.

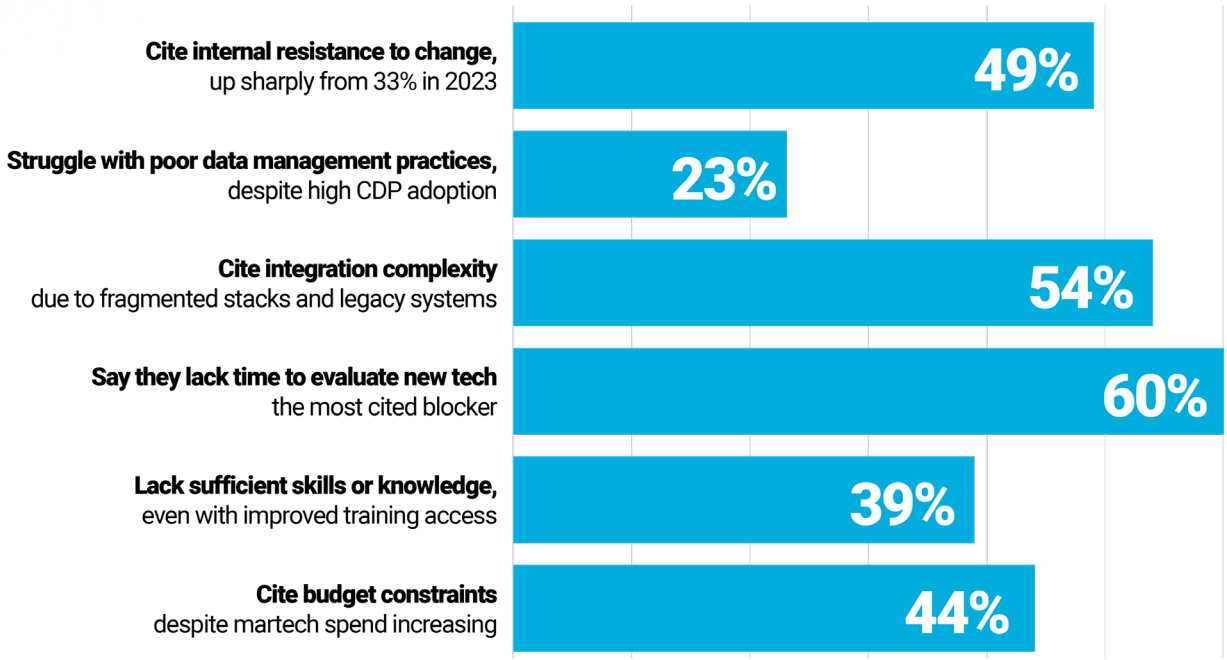
Pioneer & Pilot

2025 score: 3.54 (up from 3.48 in 2023)

This pillar, which measures experimentation, agility, and readiness to adopt new technologies, continues to be challenged by the speed of change. The AI era has fundamentally altered expectations. While scores are improving, the bar is rising even faster. In many organisations, the ability to evaluate and operationalise new tools, particularly in AI, is now considered table stakes. The maturity increase here feels modest relative to the transformation underway, pointing to a growing gap between tech velocity and enterprise adaptability.

Maturity vs. Reality: Barriers Persist

Even as maturity rises, real barriers remain:



The data points to a critical insight: maturity isn't linear. It's a moving target influenced by market conditions, internal dynamics, and rapid shifts in AI, privacy, and consumer behaviour.

Strategic Guidance

The message for CMOs is clear: building martech maturity isn't just about buying more tech—it's about strengthening the connective tissue between strategy, systems, and skills. Organisations that succeed will be those that balance experimentation with structure and embed martech into the broader business fabric.

Martech Budgets, ROI & Decision Making Trends

As marketing operations evolve under pressure to do more with less, the distribution of spend across people, platforms, media, and services continues to shift. Martech now represents a larger proportion of the overall marketing budget than ever before, signalling its status as a business-critical function, not a cost centre, but a performance lever.

Budget Allocation: A Steady Climb

Martech spend continues on an upward trajectory. In 2025, martech accounts for 31.4% of the total marketing budget, up from 30.2% in 2023. This reflects a CAGR of 6% over the last five years. In parallel, labour costs have declined from 33.5% in 2022 to 29.1% in 2025, as teams lean into automation and AI to scale operations more efficiently.

> ***"More cash is being spent on hiring martech talent, but finding experienced martech specialists is proving challenging.***
>
> ***As for the technology itself, spend continues to increase with ever-growing martech stacks providing increased AI capability. AI is revolutionising marketing by streamlining budget allocation, optimizing cross-channel strategies, and enhancing predictive bidding, ensuring we get more bang for our buck."***
>
> Jed Waddington, Director of Marketing Technology, Bright Horizons

While the balance of spend is shifting, the trend is not without constraints. 75% of CMOs expect martech budgets to rise over the next 12 months. 62% anticipate an increase of between 1% and 19%, driven primarily by the rising cost of tools and the rapid expansion of AI-enabled capabilities across the stack.

"There's definitely a higher expectation to deliver ROI with the Martech that we acquire. On top of that, there is a greater need to ensure that the platforms we acquire deliver personalized customer experiences and also meet data privacy regulations. At the end of the day, it still goes back to the challenge of Martech addressing business needs and delivering value, but the expectation to be even more efficient and disciplined has never been higher."

Jimson Gow, Director Marketing Technology at Globe Telecom

"There's zero patience left for tools that might work. If a platform doesn't deliver usable output fast (and without constant hand-holding) it's off the list. AI and martech budgets in 2025 are shaped by one thing: impact-per-pound. No one's getting extra budget for experiments. The market wants marketing that actually happens, not dashboards and demos."

Parry Malm, Former CEO and Founder, Phrasee (now Jacquard)

The most commonly cited reasons for budget growth include:

- Expansion into new markets or customer segments (58%)
- Customer experience optimisation (53%)
- Responding to shifting customer behaviours (48%)

These all point towards a focus on customer centricity for the average CMO.

"The call on smart spending at the corporate level is significantly influencing how martech and AI budgets are funded. Our focus on accelerating efficiency and expanding margins through cost savings allows us to reinvest in our science and growth drivers. This strategy guides our spending behaviours, enabling sustainable growth without sacrificing innovation.

As a result, AI and martech budget allocations are limited for deprioritized businesses, while the R&D pipeline receives priority. We also employ several strategies to optimize tech investments: purchasing at lower prices, buying more efficiently by avoiding unnecessary specifications, and reducing overall expenditure."

Carmina Santos Alvaro, Global Commercial Data Strategy, Associate Director, Sanofi

"I expect that the Canadian financial services market will start to invest more in auditability, especially given the heightened focus on AI. I think ethical AI use; data governance and compliance automation will be key areas. I think this will be supported by a continued focus on Netflix/Amazon level personalization with organizations doubling down in the Mobile space. This will lead to budgets shifting to enhanced orchestration and customer data platforms for real-time decisioning. Given the current economical landscape, leadership will be investing in martech solutions with proven ROI with measurable impact on acquisition and retention strategies."

Denise Edwards, Senior Group Manager Marketing Capabilities, TD

Performance Measurement: ROI vs ROT

As budgets increase, so does the scrutiny around performance. 73% of CMOs report having a clear and accurate measure of martech effectiveness, reflecting improved maturity in both strategy alignment and reporting frameworks. While ROI, defined as measurable uplift in marketing-driven revenue, remains a key metric, a growing number of leaders are prioritising Return on Time (ROT). 28% of CMOs cite ROT as their primary performance measure, compared with 23% who point to ROI.

ROT captures efficiency and productivity gains from martech, such as reduced manual effort, increased speed to execution, and improved campaign agility. In an

era defined by automation and leaner teams, ROT is becoming a critical indicator of operational value. As Parry Malm, former CEO and Founder of Phrasee, puts it: “Honestly, the only thing that lands with leadership is ‘we did this, and it led to X.’ Not ‘engagement went up’ or ‘we’re building brand.’ That doesn’t cut it anymore. You need visible activity tied to outcomes. It’s not about vanity metrics; it’s about showing up consistently and proving your (and the tech’s) worth.”

“Honestly, the only thing that lands with leadership is “we did this, and it led to X.” Not “engagement went up” or “we’re building brand.” That doesn’t cut it anymore. You need visible activity tied to outcomes. It’s not about vanity metrics; it’s about showing up consistently and proving your (and the tech’s) worth.”

Malm, Former CEO and Founder, Phrasee (now Jacquard)

This emphasis on measurable outcomes is echoed by Jed Waddington, Director of Marketing Technology at Bright Horizons: “The majority of our stack enables a money out, enquiries in approach, which enables attribution to specific campaigns and mediums. That’s one reason I love being a digital marketer as it’s easy to clearly show return on investment.”

Moreover, as Hazem EL Taha, Global Head of Marketing Technology at HSBC, notes: “Through the sharing of martech success stories which all have a focus on commercial outcomes, either revenue uplift or cost savings, marketers prove business impact.” This shift from vanity metrics to hard business outcomes underscores the rising importance of both ROI and ROT in demonstrating martech’s contribution to organisational success.

Decision Making: Slower, More Complex

Despite budget growth, decision-making is becoming more cumbersome. The number of internal stakeholders involved in martech and AI-related procurement has expanded significantly. 69% of CMOs report that the size of the buyer committee for AI, martech, or data initiatives has increased over the past 12 months.

Today, decisions that once sat primarily with marketing now span IT, data, procurement, legal, compliance, and finance. This multidisciplinary involvement has introduced new rigour — but also, in many cases, new friction. Lengthier procurement cycles and consensus-based models are delaying speed-to-value in areas where agility is increasingly a differentiator.

Ownership of the martech and AI budget reflects this complexity:

- Only 12% of organisations report marketing as solely responsible
- 29% say marketing leads with input from technology
- The majority now operate under shared or tech-led governance structures, particularly for tools requiring integration, data modelling, or AI deployment

Strategic Guidance

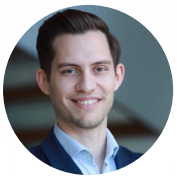
As spend increases and expectations rise, the imperative for CMOs is clear: accountability must scale alongside investment. This means not only demonstrating ROI, but ensuring martech contributes directly to strategic goals — be it market expansion, CX innovation, or operational efficiency.

The challenge for marketing leaders is no longer whether to invest in martech. It is how to invest well, deploy quickly, measure impact rigorously, and navigate an increasingly complex internal decision-making environment. In this context, clarity of ownership, aligned governance, and an integrated measurement framework are becoming as important as the technology itself.

Modern AI, Marketing & Data Stack

The martech stack has evolved. What began as a collection of marketing tools for basic marketing automation and campaign execution has matured into an intelligent, integrated system — one where data is the fuel, AI is the engine, and marketing is the driver and strategic navigator.

Today's stack is no longer defined by a set of products, but by its ability to connect data, automate decisioning, and activate personalised experiences in real time. That transformation is reshaping both the architecture and the operational mindset behind modern marketing.



"AI has shifted the stack from being a delivery engine to being a decision engine. That changes how we structure our tech and our teams."

Charel Schmit, Regional Biddable Media Lead, Mars

"We've built the stack — CDPs, offer engines, automation layers — but without orchestration, it's just well-funded chaos."

Ravi Naramsetty, Head of Martech, Telia Company

Stack Size & Structure

The size and sophistication of the average marketing stack continues to grow. In 2025, the average enterprise marketing stack comprises 62 tools, up from 56 in 2023, driven in large part by the expansion of AI capabilities and new categories of intelligent tools.

This growth reflects a shift in architecture and appetite. The dominant strategy remains clear: 86% of CMOs favour a best-of-breed approach when designing their stack. Marketers are building modular, composable ecosystems that integrate specialised tools around specific use cases, rather than defaulting to all-in-one suites.

The growing role of AI is set to further reshape stack design. The rise of AI agents and conversational interfaces is expected to reduce friction and complexity, democratising access to enterprise-grade capabilities and redefining how marketers interact with their tools.

"The conversations around AI have quickly evolved from 'Generative AI' to 'Agentic AI', even while many brands are still trying to figure out how to leverage Generative AI in the content supply chain, audience building/segmenting and predictive analytics. The early use cases for Agentic AI in marketing is in research by creating synthetic data via AI personas, and using Agents to improve martech workflows."

John Hardy, SVP of Marketing Technology, ANA

"With more than 80 platforms in our martech stack, integration is more important than ever. Whilst each tool has its own role, data and operational silos are increasingly frustrating. Building a truly composable, integrated stack is the North Star to enable scalability, agility and consolidated reporting."

Jed Waddington, Director of Marketing Technology, Bright Horizons

"It's a more composable core stack with long tail of AI native tools and a focus on seamless data integration. Conversely in the selection process we have become less concerned about UI/UX as prompting/conversational interfaces will take over."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

Data Management: The Bedrock of Performance

As the stack expands, so too does its dependency on high-quality data. 77% of organisations say that data management is the foundational layer underpinning the effectiveness of their marketing stack.

Yet data management challenges persist. 61% of organisations report having excessive volumes of data they struggle to use effectively. Fragmentation, poor modelling, and a lack of skilled resources continue to limit the performance of even the most advanced stacks.

"There has been a significant shift towards an integrated martech stack (e.g. a platform-based ecosystem) across marketing. I think risk aversion, privacy and regulatory constraints and data silos will be the biggest barriers faced."

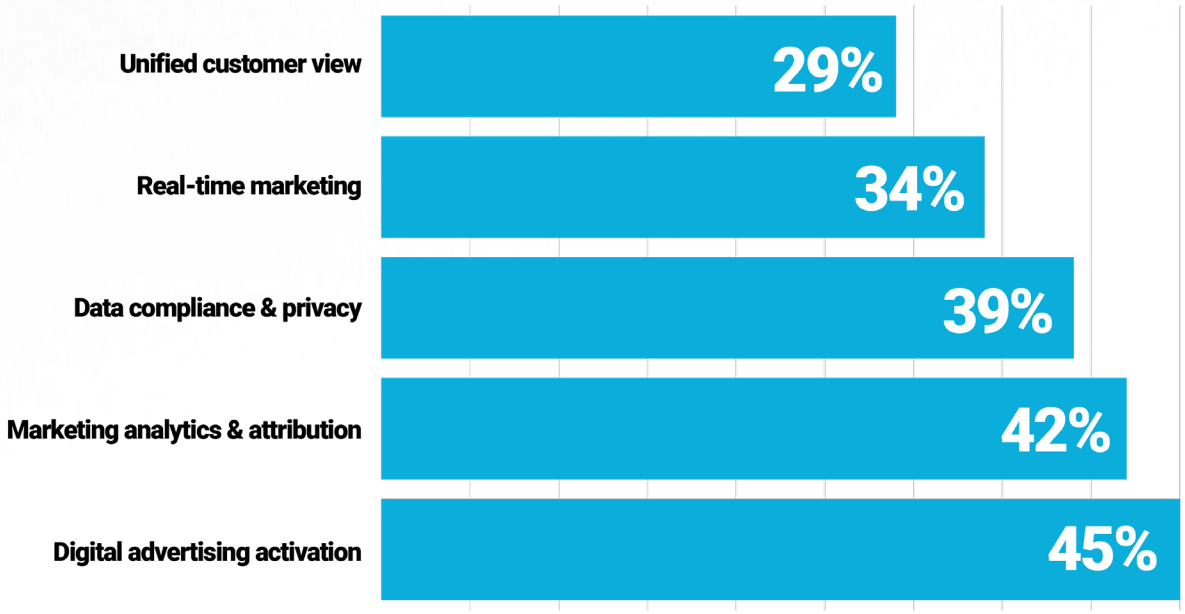
Denise Edwards, Senior Group Manager Marketing Capabilities, TD

As a large bank, it's only correct that we are sure about the safety and compliance aspects of any technology before we implement them. So, we aren't trying to fully activate AI capabilities but are focusing on high impact use cases that are being piloted in specific markets before rolling out across the bank."

Hazem EL Taha, Global Head of Marketing Technology, HSBC

At the same time, the focus has shifted from data acquisition to activation — from storing data to making it actionable in real time. A strong first-party data strategy is now a prerequisite for AI transformation. And at the core of this strategy lies the Customer Data Platform (CDP).

CDPs continue to be central to stack design because they support a wide array of strategic data initiatives, which the average CMO is focused on in the year ahead, including:



CDPs also increasingly act as the gateway to AI decisioning — many housing embedded AI engines that trigger dynamic personalisation and automate multichannel engagement. But while the technology is key, unlocking full value still depends on expert implementation and data modelling, a need that's driving demand for specialist data professional services.

"Many brands are still struggling with poor data quality, which is the foundation for effective use of AI. Cost and lack of expertise are other barriers."

John Hardy, SVP of Marketing Technology, ANA

"The most fundamental barriers when building a data strategy are linked to complexity of data storage locations, variances in data quality, and lack of recognised consent to utilise data for future use cases. If all of these are not sufficiently provided, they will ultimately impact the efficacy of an AI model. For example, poor data quality can result in reduced accuracy of model predictions and reliance on its outcomes will be compromised.

To ensure data readiness is delivered enterprise-wide it is necessary to create a culture of data literacy across all relevant divisions. This will enable the business to identify priority areas to address through the use of AI models, create an optimal data infrastructure, and deploy automation tools that deliver desired results which can be scaled."

Sharon Braude, Director Marketing Operations, Planning & Insight, Red Bull Racing & Red Bull Technology

"Overcomplicating and overpromising. Too many vendors make it feel like you need a PhD just to plug their product in. Marketers end up wasting cycles "aligning systems" or chasing another AI demo when what they actually need is output. Clean, usable output. The real barrier? Time and energy. Focus on consistent delivery, not some magical data utopia that never arrives."

Parry Malm, Former CEO and Founder, Phrasee (now Jacquard)

"Data integrity and scattered data across our martech stack are major barriers. Just like a recipe is only as good as its ingredients, AI is only as effective as the data it processes. Garbage in, garbage out - even with AI. We need to ensure we are providing AI with correct data, else it's useless.

Additionally, navigating the ever-changing landscape of AI

policies, regulation and data privacy concerns is a constant headache for us, our customers and the entire world."

Jed Waddington, Director of Marketing Technology, Bright Horizons

Contextual Signals & Intent-Driven Insight

As traditional identifiers and some third-party data sources diminish, marketers are turning to contextual data and inferred intent signals to fill the gap. This approach focuses on real-time behavioural signals — not static profiles — to determine what a customer wants, needs, or is ready to do next.

These models rely on moment-based understanding, combining device signals, behavioural patterns, and environmental data to deliver relevance without overstepping privacy boundaries.

This shift, transforming customer interactions through context-aware AI decisioning that personalises content, timing, and channel — even without knowing the customer's identity. This kind of marketing respects consent while significantly boosting precision and performance.

As regulations tighten and consumer expectations rise, contextual intelligence is fast becoming a core capability of the modern AI-enabled stack. And this level of sophistication requires deeper knowledge to bring it to life.

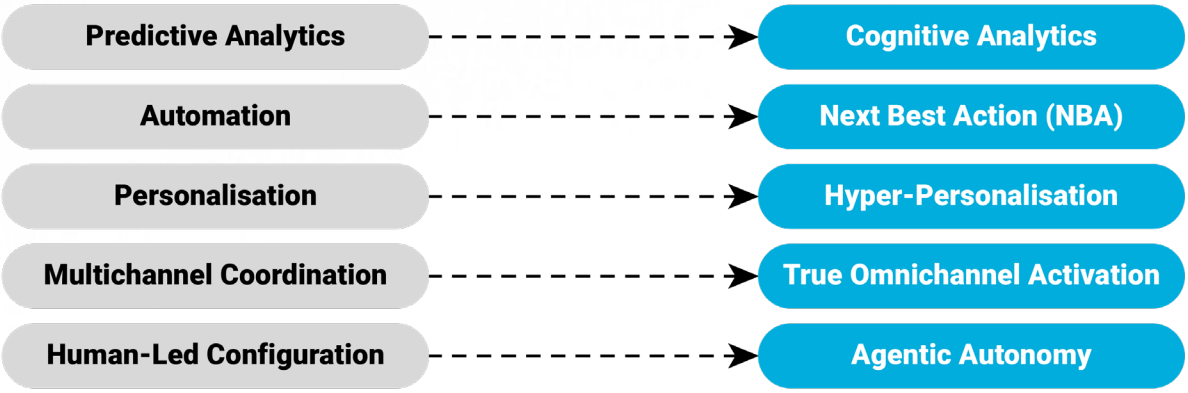
Over the past few years, the marketing landscape has undergone a profound transformation. Traditional broad-brush segmentation has given way to highly individualised engagement, driven by the ability to derive deep behavioural understanding from mobile devices. Today's marketeers can access a rich tapestry of contextual, real-time signals—from app usage patterns and screen time to commuting routines and contextual cues—all processed on-device to ensure privacy. This shift has enabled a move from generic messaging to personalised interactions that reflect the individual's context,

preferences, and intent, dramatically improving relevance, timing, and effectiveness of campaigns.

Jonathan Woolf, Chief Revenue Officer, Intent HQ

From Automated to Predictive to Cognitive

AI is no longer an enhancement, it's becoming the operating layer of the stack. Where once basic automation enabled campaigning, it's now AI decision intelligence across every channel. Recent advancements have enabled a shift from:



AI now powers next-best content, channel, product, and offer recommendations. These capabilities are no longer experimental — they are foundational to delivering scalable, responsive, and relevant experiences.

Governance, Privacy and Ethics

As AI capabilities advance, so too does the responsibility to govern them with rigour. The acceleration of agentic and autonomous technologies has outpaced many organisations' internal controls, raising urgent questions about oversight, accountability, and responsible data use.

Privacy is no longer a compliance checkbox, it is a strategic imperative. Regulators are sharpening their focus, with new frameworks emerging globally that challenge

how data is collected, processed, and shared in real time. AI systems built on opaque data flows or unchecked automation are increasingly seen as reputational and legal liabilities.

The stakes are growing. Public and institutional scrutiny of data ethics is intensifying, as evidenced earlier in this report by the high-profile moment this year when dozens of major newspapers coordinated their front pages to protest the unauthorised use of their content in AI model training.

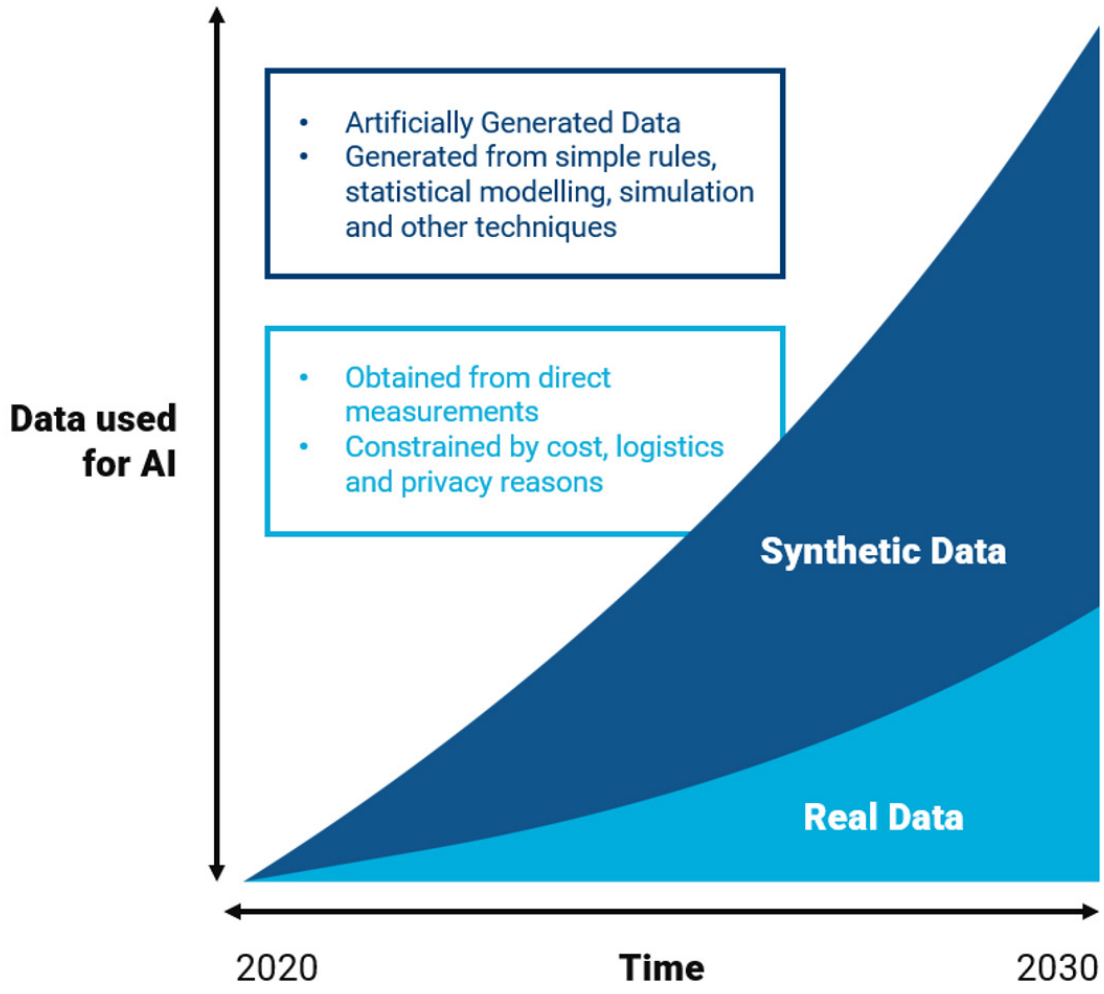
As marketing becomes more data-driven and AI-led, governance must evolve in parallel. Organisations must establish clear policies for data ownership, model transparency, and human oversight. Without this, the very technologies designed to create smarter, faster marketing could undermine customer trust and organisational integrity.

Synthetic Data: Powering AI Without Compromise

AI models require vast, diverse datasets to function, but acquiring that data ethically, safely, and at scale is a growing challenge. Enter synthetic data: artificially generated datasets that replicate real-world patterns without exposing personal information.

Synthetic data, increasingly used for model training, scenario testing, and algorithm refinement, offers a way to accelerate AI performance while mitigating compliance risk. It enables teams to build and optimise intelligent systems—even where real data is scarce, regulated, or siloed.

While adoption is still early, synthetic data is already proving valuable in high-sensitivity use cases, from financial services to healthcare, and it is poised to become a standard tool in AI marketing operations. Gartner is predicting that by 2030, synthetic data will overshadow real data in AI models.



Source: gartner.com

Strategic Guidance

The marketing stack of the future will not be managed, it will be orchestrated. Interfaces - instead of clicking, searching, dragging and dropping, we will simply prompt at first by text before later by voice. Execution will shift from manual workflows to autonomous agents. And stack strategy will shift from technical know-how to prompt engineering, AI logic, and intent modelling.

In this context, CMOs must reframe their thinking about capability. The modern stack is not just a toolkit—it's a dynamic system powered by intelligence, shaped by data, and deployed by teams that understand both the science and the story.

People, Talent, Skills and Knowledge

Technology may be the enabler, but people remain the force multiplier. Yet as martech stacks grow more complex and AI adoption accelerates, the talent gap is widening — and it's limiting the ability of many organisations to fully capitalise on their investments.

AI is accelerating at an unprecedented pace, with the convergence of Generative, Causal, Edge and Agentic AI unlocking powerful new marketing paradigms. Together, these technologies are empowering companies to deliver new levels of hyper personalised engagement, leveraging a deeper understanding of the customer's behaviour and context in the moment. However, for many organisations the reality is that entrenched organisational cultures and internal silos can resist the cross-functional collaboration and agility needed to adopt the latest AI technologies. Embracing the need for a new organisational model now, in parallel with early introduction and testing of any new AI capability is important to optimise the realisation of the myriad financial and customer benefits.

Jonathan Woolf, Chief Revenue Officer, Intent HQ

In 2025, 32% of CMOs cite a lack of internal skills and talent as a direct barrier to realising value from their martech stack. This aligns with broader concerns across the industry: 61% of organisations say they find it challenging to recruit marketers with the AI, martech, data, or operations expertise required to move at pace.

"Humans with AI will replace humans without it — the skills conversation isn't about survival, it's about relevance."

Charel Schmit, Regional Biddable Media Lead, Mars

Skills Shortage and the Upskilling Imperative

Despite advances in maturity across platforms and processes, talent remains a pressure point. Many of the reasons martech tools underperform — underutilisation, misalignment with use cases, and lack of integration — are linked to capacity and skills gaps within teams.

In response, CMOs are doubling down on workforce development. The most common approach remains in-house upskilling and reskilling, selected by 38% of organisations. A further 33% are investing in recruitment, while 24% rely on specialist professional services, and 5% on contractors.

"The key to teams succeeding is ongoing education. And creating a culture of curiosity and experimentation."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

Certification in martech and AI is also on the rise. LXA has seen a significant year-on-year increase in demand for training to address emerging capability gaps across AI enablement, stack design and management, data, orchestration, and customer intelligence. Carlos Doughty, CEO of LXA, highlights: "Unsurprisingly we have seen unprecedented demand for AI marketing training in this climate. From literacy to advanced roadmap development, organisations are leaning in at every level."

"At LXA we're equipping both our internal teams and clients to become strategic AI operators—not just users—through targeted training in AI literacy, automation tools, and real-world marketing applications. Our programs focus on embedding AI into day-to-day workflows, ensuring professionals can confidently plan, execute, and optimize in an AI-driven environment. It's about enabling people to work with AI, not around it."

Rachael Smith, Managing Director, LXA

Priority Skills for 2025

The focus on AI is unmistakable. The top five areas CMOs are targeting for upskilling in the next 12 months are:

- AI marketing (55%)
- Marketing technology (53%)
- Social media management (49%)
- Content development and management (46%)
- Marketing analytics and insight (40%)

This reflects the evolution of marketing itself — and the average marketing stack.

"I think finding talent that have broad skillsets will be the biggest challenge (e.g. a person that has equal strengths in marketing/creativity, compliance/risk/banking regulations and data fluency will be hard to find). Typically, you see people that are stronger in one area over another. Marketers will need to expand their tool chest to better understand how technology can streamline work and where they need to lean in to refine or validate data/AI outputs to more effectively use them. It will be crucial to also hone customer behaviour skillsets to influence behaviours across channels. Marketers will need to keep pace with the regulatory landscape of the market they're in as it keeps evolving to keep pace with technology enhancements. Lastly, I've seen a big focus on enabling a growth mindset – a core foundational element to help marketers embrace change, upskill and experiment."

Denise Edwards, Senior Group Manager Marketing Capabilities, TD

For example, AI has redefined how content is created, campaigns are executed, and customer experiences are personalised at scale.

"Prompting skills, storytelling, choosing the right tools and partners to accelerate the strategy are key skills in an AI era."

John Hardy, SVP of Marketing Technology, ANA

"As AI gets better and is able to take on more and more operational work, marketers must develop strategic thinking. The ability to join the dots across different workstreams and functions will become vital."

Hazem EL Taha, Global Head of Marketing Technology, HSBC

"In an AI-powered environment curiosity, clarity, and ruthless prioritisation are key. You don't need to learn how to build an AI model; you need to learn how to use one well... The winners won't be the most technical, but rather the ones who ask the right questions, define the real problem, and move fast without getting distracted."

Malm, Former CEO and Founder, Phrasee (now Jacquard)

Rise of the AI-Augmented Marketer

The role of the modern marketer is being reshaped. Teams are no longer just adopting AI tools — they're adapting to work with AI to execute tasks, surface insights, and make decisions autonomously. The rise of AI is not just reducing manual workload but raising the bar for strategic and analytical skills.

Rather than replace marketers, AI is augmenting them. This calls for a new breed of marketer: one fluent in AI logic, prompt design, data modelling, and outcome measurement.

The Rise of AI Agents: Redefining Marketing Teams

"The rise of AI Agents will be the most transformative change we have ever seen in marketing. The ripple effect of this will be thinking capability development, training and organisational culture for teams. Balancing the role of the artisan human with that of the fully autonomous agent We will need to rethink training and development as we know it - something we have already started at LXA. We now train and develop both human workforce and digital workforce: agents."

Carlos Doughty, CEO, LXA

AI agents — autonomous systems that can execute tasks, make decisions, and adapt based on outcomes — are beginning to reshape marketing operations in fundamental ways. From content creation and performance reporting to campaign deployment and testing, these agents are reducing manual effort and introducing new operating models.

"We're already seeing AI agents take on tasks in media planning, content generation, and campaign testing. This isn't hypothetical anymore."

Marco Andre, Executive Director - Global Marketing & AI Excellence, Novartis

The shift is no longer theoretical. 70% of CMOs agree that AI agents will be one of the most transformative technologies marketing has ever seen, and 38% believe that between 16% and 50% of current marketing roles will be replaced by AI agents within the next 24 months.

While the term "replacement" often triggers concern, the data suggests a more nuanced reality: roles are evolving, not disappearing. AI agents are set to take over repeatable, rules-based tasks — freeing marketers to focus on strategy, creativity, optimisation and orchestration.

"AI will absorb all the mundane repetitive non direct (business or customer) value-added tasks. But humans are critical to driving creativity, managing the strategy, operating with empathy and setting the guidelines and boundaries on how AI is governed."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

"We're not building for marketers to execute tasks. We're building for AI to execute, and marketers to optimise."

Naramsetty, Head of Martech, Telia Company

This will have wide-reaching implications:

- Team structures will flatten, with fewer layers required for task execution
- Marketers will become fat Ts, with greater breadth and depth of the marketing competencies they can cover enabled by AI
- New roles will emerge, focused on agent training, performance tuning, and ethical governance
- The definition of marketing productivity will shift, prioritising time-to-value and adaptability over headcount

"AI agents are shifting the value equation — from hours spent to outcomes delivered. Agencies and in-house teams both need to evolve."

Charel Schmit, Regional Biddable Media Lead, Mars

"They're unbundling the traditional agency model. You don't need a room of people anymore—you need one good operator with the right tools. The AI agent becomes the marketing manager's 'doer'... But, as always, caveat emptor applies; beware greasy salesmen selling snake oil now more than ever."

Parry Malm, Former CEO and Founder, Phrasee (now Jacquard)

"Coding, research, data mining and analytics, audience building are the most likely to be taken by AI."

John Hardy, SVP of Marketing Technology, ANA

The most progressive organisations are already experimenting with agent-led workflows. Over time, these systems may not just support marketers but collaborate with them, acting as embedded, intelligent members of the team.

Collaboration Across Functions

As stacks become more interconnected, so must teams. Effective martech execution demands closer alignment between marketing and technology functions, a theme that emerged strongly in this year's data.

"AI agents and autonomous tools are accelerating automation and significantly reducing time to market. They're reshaping how we interact with data, make decisions, and structure teams — pushing us toward more connected, ecosystem-driven models. This shift requires new skills and new ways of thinking. It's not about doing more with less, but about doing things differently altogether."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

Responsibilities across AI marketing, stack design, integration, and vendor management are now shared or split between departments. For instance:

- Only 12% of organisations say marketing solely manages AI marketing and martech budgets
- In most cases, governance follows a model of collaboration or shared ownership, with IT often taking the lead in areas like integration and data modelling

The complete split is detailed below:

This trend reflects the increasing need to bridge the art and science of marketing, with cross-functional teams operating as stewards of both creativity and technical excellence.

Area	Entirely by marketing team	Mostly by marketing with some tech collaboration	Even split. Marketing and tech collaborate closely	Mostly by tech with some marketing collaboration	Entirely by tech team
AI Marketing Strategy / Roadmap	12%	33%	25%	17%	12%
Marketing Operations & Martech Strategy / Roadmap	20%	23%	34%	16%	7%
AI Marketing & Martech Budget Management	12%	29%	25%	19%	13%
Martech Stack Design	12%	27%	35%	14%	11%
CRM / CDP / Customer Data Management	17%	29%	29%	12%	12%
Marketing Automation Management	18%	28%	27%	21%	5%
AI marketing / Martech Tool Selection	16%	28%	31%	17%	7%
Martech Tool Integration & Configuration	13%	28%	30%	20%	9%
Martech Tool Programme & Project Management	16%	32%	23%	18%	9%
Martech Tool Troubleshooting & Support	10%	26%	28%	23%	13%
Martech Vendor Management	16%	30%	29%	13%	11%
Marketing Operations Management	24%	27%	29%	15%	5%
Campaign Operations Management	21%	28%	30%	16%	5%
AI & Data Governance & Compliance	17%	27%	24%	19%	13%
Data Architecture & Modelling	13%	26%	27%	21%	13%

The Organisational Shift

Looking ahead, CMOs will rethink how they structure teams to deliver marketing performance. In addition to upskilling, many will think of agents as digital employees. And redesign teams accordingly.

These shifts are being driven by necessity. With 62 tools in the average stack, and AI transforming every layer of the funnel, the demands on marketing operations have outgrown traditional team models. New roles are emerging in areas like AI orchestration, data engineering, AI ethics, and automation governance — roles that didn't exist just two years ago.

A Talent Strategy for Transformation

The future of martech won't be defined by the tools an organisation buys, but by the teams that build and manage them. AI may be changing what's possible, but talent determines what's realised. For CMOs, the imperative is clear: invest in the people who can unlock the stack, and build the knowledge base to keep evolving with it.

Roadmap to Success

Building a high-performing, AI-enabled marketing function requires more than budget and tools — it requires focus, prioritisation, and a clear operating model. As the stack grows more complex and the pace of change accelerates, organisations must develop a disciplined approach to maturing their martech and marketing operations capabilities.

This year's research shows encouraging signs: martech maturity levels are increasing across every key pillar. But it's also clear that many organisations are struggling to translate potential into performance. 44% of CMOs cite budget constraints, 54% report ongoing integration complexity, and 49% highlight internal resistance to change, up sharply from 33% the year before.

"We spent a decade stacking tools. Now the challenge is sequencing them — and resourcing for real execution."

Ravi Naramsetty, Head of Martech, Telia Company

These challenges underline a central truth: martech transformation is not a one-off investment — it's a managed journey.

1. Set a Clear Strategic Vision

The most successful organisations start with intent. A high-impact roadmap begins by articulating a 3-year vision, supported by a 1-year plan and broken down into quarterly execution milestones. This ensures all initiatives are aligned with business outcomes and that progress can be measured incrementally.

- Your 3-year vision sets the strategic north star for how marketing will operate, perform, and contribute to growth.
- Your 1-year plan translates that vision into realistic, resourced programmes.

- Your quarterly roadmap breaks the work into deliverable projects, accounting for team capacity and cross-functional dependencies.

Without a structured plan, marketing risks chasing quick wins or burning time on low-impact efforts. Prioritisation frameworks—such as impact/effort matrices or weighted scoring models—are essential for sequencing initiatives in a way that balances ambition with bandwidth.

"Stop building around the process. Build around output. The only way to survive the pace of change is to stay focused on what needs to happen, not how it happens. If the tech changes, fine. Swap it out. But don't fall in love with your tools or workflows. The tech should be invisible. That's the point."

Parry Malm, Former CEO and Founder, Phrasee

"To build an effective operating model, companies will need to reorganize focused on journeys and value streams instead of departments, products or projects. Companies will need to double down on chasing customer outcomes and not just deliverables. I also think building more strategic and scalable solutions will be a core pillar in driving speed to market and personalization. T shaped teams that have both deep expertise and broad subject matter expertise will be the most advantageous – albeit the hardest to build. I think leveraging a quarterly planning and OKR process will also keep teams focused on the right priorities to achieve the right outcomes while still being flexible."

Denise Edwards, Senior Group Manager Marketing Capabilities, TD

2. Build the Right Governance Model

As marketing operations scale, governance becomes a critical enabler. This includes:

- A steering committee of executive sponsors (e.g. CMO, CTO, CFO, Chief Digital Officer) to align strategic goals and secure investment
- A programme and project management team to define, deliver, and optimise marketing initiatives
- A centre of excellence (CoE) or federated martech team model to centralise capability while enabling local execution

"Prioritise martech and AI initiatives based on a few key principles. First, a focus on commercial impact and enhancing customer experience... Governance is non-negotiable—it sits at the core of everything we do to ensure trust and accountability."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

Organisations should also adopt governance frameworks such as RACI models, ensuring clear accountability for stack design, integration, vendor management, and data compliance.

3. Prioritise High-Impact Use Cases

Martech maturity doesn't require doing everything at once. It requires doing the *right* things in the *right* order.

"Identify the 'high-value' use cases to focus on, start small and test your way to scaling, simplify the stack."

John Hardy, SVP of Marketing Technology, ANA

Begin with low-effort, high-impact use cases—areas where you can quickly demonstrate value, build internal momentum, and lay foundations for longer-term change. Common quick wins include campaign orchestration improvements, automation of manual reporting, or the rollout of conversational AI pilots.

"Look for low-complexity, high-value opportunities that can deliver fast returns… and embrace cross-functional collaboration as a catalyst for scalable success."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

High-effort, high-impact initiatives — such as full-stack rearchitectures or enterprise-wide CDP implementation — should be planned as longer-term programmes with staged delivery and dedicated resources.

4. Enable the Team

Without the right people, even the best-designed roadmaps will fail. The team executing your roadmap must be empowered with the skills, tools, and support to deliver effectively.

This includes:

- Ongoing training in AI, martech, marketing operations, data analytics, and orchestration
- Access to internal and external resources (e.g. professional services, contractors, and agency partners)
- Clear documentation, processes, and onboarding to avoid knowledge loss and execution gaps

"Value the durable or soft skills (adaptability, embrace change, influencing, fast learner, etc.) as much or more than the hard technical skills."

John Hardy

In-house upskilling remains the preferred approach for 38% of CMOs, but it must be backed by structured learning pathways and role clarity.

5. Embrace Agile Execution

Agility is not just a methodology—it's a mindset. Leading organisations are applying agile principles to manage martech workstreams: iterating quickly, learning from data, and reallocating resources based on performance.

Agile delivery methods allow teams to remain responsive to emerging tools, customer expectations, and internal feedback, critical in an environment where AI is accelerating both opportunity and obsolescence.

"To build an operating model that can keep pace with rapid technological change, we rely on agile methodologies and fast learning loops to stay responsive and adaptable... We use sandboxing to safely test and learn without disrupting core operations."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

6. Track, Measure and Course Correct

Success should be measured in both effectiveness and efficiency—not only by how much value is delivered but also by how intelligently time and resources are deployed.

- Metrics should align with business goals, such as:
- Marketing productivity and Return on Time (ROT)
- Revenue and pipeline influence
- Campaign velocity and cycle time
- Stack adoption and utilisation
- Operational cost savings or process efficiencies

Regularly reassessing your roadmap based on results, resourcing shifts, and organisational priorities ensures it remains a live, strategic asset, not a static plan.

Final Thought: Orchestrate for Impact

The road to martech maturity is not defined by the number of tools you deploy, but by the clarity of purpose, discipline of execution, and strength of your people.

> ***"Business strategy always leads, grounded in evolving customer needs — not chasing technology for its own sake."***
>
> Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips

In 2025 and beyond, success will belong to organisations that operate with intention — architecting stacks, strategies, and teams that turn marketing from a service centre into a growth engine.

The Future of Martech / Emerging Tech

The future of martech is not just about more tools, data, and AI — it's about how marketing becomes orchestrated, autonomous, and agentic. As platforms evolve and interfaces shift from dashboards to dialogue, the foundational architecture of the stack is being rewritten. From how marketers work to what teams look like, everything is in motion.

"Composable tech, AI-native tooling, and omnichannel orchestration aren't buzzwords — they're where the competitive edge lives now."

Ravi Naramsetty, Head of Martech, Telia Company

This section outlines our key predictions for the road ahead.

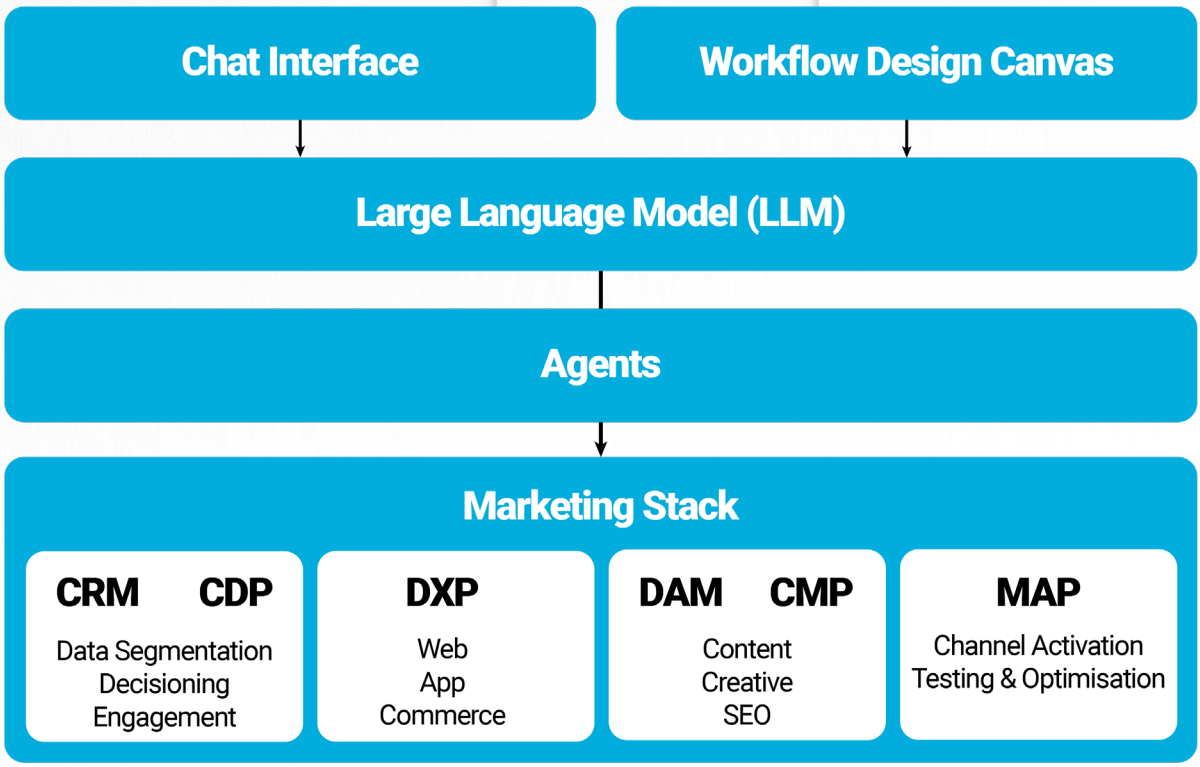
1. Agentic AI Becomes Foundational

Marketing is on the verge of a structural reset. 70% of CMOs agree that AI agents will be among the most transformative technologies marketing has ever seen, and 38% believe that 16–50% of current marketing roles will be replaced by agents within two years.

This isn't hype — it's already happening. Agents are taking on tasks in campaign execution, media buying, analytics, and content creation.

"Over the next 2–3 years, I believe AI agents and agentic, self-prompted or self-building applications will have the greatest impact on marketing. These technologies will fundamentally change how work gets done."

Henk-jan ter Brugge, Head of Marketing Technology, Digital CoE, Philips



"Agents embedded in the stack workflows and making autonomous decisions."

John Hardy, SVP of Marketing Technology, ANA

The long-term implication is that entire workflows will be automated, leaving human marketers to focus on optimisation, insight, and brand leadership.

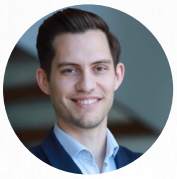
"You shouldn't be afraid of AI taking your job. You should be afraid of someone using AI to do your job better."

Marco Andre, Executive Director – Global Marketing & AI Excellence, Novartis

In many ways, the baseline for performance is shifting from the traditional marketer to the "10x marketer" — someone who is AI-augmented and extended with agents, analytics-fluent, and strategically focused.

2. The Stack Becomes Democratised

As agents and natural language interfaces advance, the marketing stack is becoming more accessible and modular. Instead of navigating complex tools via clunky dashboards, marketers will engage with intelligent systems through conversational interfaces — asking, prompting, and instructing in natural language.



"We're approaching a moment where the stack becomes invisible. You'll talk to your stack — not configure it."

Charel Schmit, Regional Biddable Media Lead, Mars

This shift means the future stack is no longer a fixed architecture. It is composable, intelligent, and interchangeable. Tools can be swapped in and out with ease, decisions can be made through dialogue, and personalisation engines will learn and optimise in real time, reducing reliance on human configuration.

3. Data Modelling and Management Remains Priority

Despite all the advances in tooling, data remains the lynchpin. The challenge is no longer collection — it's the ability to model, activate, and govern that data at scale.

61% of organisations still struggle to make effective use of the data they already have. Many lack the infrastructure required to deploy AI meaningfully across the stack.

Privacy concerns are rising in parallel. The protest from global news publishers over AI training data has signalled an inflection point. Responsible marketers will need to build transparent, privacy-preserving systems as a default.

> ***"Much of this technology will use data and AI to determine which offers to make to which people… Ultimately, sellers' AI agents will be interacting with buyers' AI agents. This 'machine to machine' marketing will require quite a bit of adjustment and new technology on its own."***
>
> David Raab, Founder, CDP Institute

David Raab also highlights the growing importance of "instant commerce" — where the traditional buying funnel collapses into a single moment across TV, search, or social. This future, where trust must pre-exist the transaction, will demand a new wave of martech capabilities, including:

- Persistent shopping carts
- Buyer agents conducting autonomous research
- Privacy-safe data sharing in clean rooms
- Deep integration between CX, media, and commerce systems

"Much of the market isn't consciously preparing for this new world — but the individual building blocks are emerging."

David Raab, Founder, CDP Institute

Emerging Innovations: Privacy-First Intelligence

To navigate rising privacy demands, two innovations are gaining traction:

Synthetic Data | Artificially generated datasets that mimic real-world behaviour — ideal for model training, campaign simulation, and product testing without exposing personal data.

Edge AI | On-device machine learning that allows data processing at the source — enabling behavioural insights without transmitting personal data externally.

Together, these techniques offer complementary paths to unlock intelligence without compromising user privacy.

Final Thought

The future of martech will be defined less by what tools we adopt and more by how we orchestrate, automate, and adapt. As agentic systems, invisible stacks, and privacy-first architectures take hold, the role of marketing leaders will evolve from tech implementers to transformation architects.

Case Study | AnyPark: Driving Premium Conversions with AI-Activated Precision

OBJECTIVE

Increase sign-ups among existing users to a premium subscription.

TARGETING STRATEGY

AnyPark used real-time behavioural signals to identify and engage high-intent users at moments of peak receptivity, replacing static segmentation with AI-activated precision.

SOLUTION

Intent HQ's patented Edge AI surfaces thousands of on-device privacy-safe behavioural signals, transforming static customer records into dynamic intent profiles that drive precise, high-impact conversions.

AnyPark is reimagining urban mobility. As one of Europe's fastest-growing smart parking platforms, it helps millions of drivers locate, reserve, and pay for parking through a seamless mobile experience. But in a hyper-competitive market, success depends on more than just digital convenience—it depends on deeply understanding what motivates customer actions and unlocking moments that matter.

In 2024, AnyPark set its sights on scaling **AnyPark+**, its premium tier offering advanced features and exclusive benefits. The objective was clear: **increase registrations among existing users who hadn't yet upgraded**. The challenge was sharper: how do you persuade customers to make the leap, without spamming their inbox or relying on blunt segmentation?

Enter Intent HQ.

Using **Intent HQ's Edge AI platform**, AnyPark uncovered an entirely new layer of actionable insight. Where traditional analytics stop at transactions and sessions, Intent HQ goes deeper, surfacing

thousands of nuanced, **privacy-safe behavioural signals** that reveal each customer's unique intent in the moment.

Rather than relying on static attributes or basic usage data, AnyPark now had access to a **dynamic behavioural profile** of each user. The technology pinpointed who was most likely to upgrade, when they'd be most receptive, and what types of messages would land with impact.

Crucially, these insights weren't theoretical—they were **activated in real time**.

By engaging users **at high-intent moments**—for instance, just after completing a parking session or while browsing premium features—AnyPark delivered tailored prompts that felt timely, relevant, and personal. The result? A **250% uplift in average click-through rates**, translating directly into more premium sign-ups.

And it all happened with **no compromise on privacy**. Backed by 39 patents, Intent HQ's federated AI architecture ensures that all data is anonymised and remains within the client's environment. No data movement. No exposure. Just intelligence with integrity.

This wasn't just a tactical win. It was a strategic unlock.

AnyPark proved that **personalisation at scale doesn't require identity**, and that **marketing effectiveness is no longer gated by third-party data**. With Intent HQ, the team shifted from broadcasting to orchestrating—aligning the when, why and how of engagement around real customer intent.

For marketing leaders navigating the complex realities of 2025—fragmented stacks, consent-led data, and rising acquisition costs—this case study delivers a clear message: **contextual intelligence drives conversion**. And **AI-powered empathy** is now a core capability.

As AI reshapes the future of martech, AnyPark's experience shows what's possible when **precision meets purpose**. When you engage with intent, performance follows.

Case Study | Evest: Accelerating Growth with AI-Powered Precision

THE CHALLENGE

Evest needed to turn a surge of new user registrations into revenue-driving actions, but many users stalled before making their first deposit—rendering traditional engagement strategies ineffective.

Key challenges included:

- High registration drop-off
- Ineffective engagement methods
- No clear signal of readiness

Evest is redefining digital trading in the Middle East. As a leading online financial trading platform, it serves a rapidly growing user base drawn by its accessibility, regional focus, and intuitive experience. But like many in the fintech space, Evest faced a familiar challenge: how to turn high volumes of new registrations into real, revenue-driving activity.

To sustain growth, Evest needed to **increase First-Time Deposits (FTDs)**—a critical success metric. But the pathway to that conversion was far from linear. Newly registered users often failed to take the next step. Many downloaded the app, browsed a few options, and dropped off. Conventional engagement strategies—batch-and-blast emails or app notifications—fell short.

Evest partnered with Intent HQ to change the game.

By integrating Intent HQ's **Intent Edge platform** via a lightweight SDK, Evest unlocked a new approach to engagement, powered by behavioural insight and delivered at the **precise moment each user was most likely to act**. Rather than relying on guesswork or static segments, the team activated Intent Edge's **'Best Moment to Engage'** feature to dynamically detect in-app signals of readiness and deliver highly contextual prompts in real time.

Campaign 1: Precision in Action

In one early campaign, Evest targeted Arabic-speaking users with a tailored proposition to invest in Talabat stock. Instead of deploying a one-size-fits-all message, Intent Edge zeroed in on users who were **already primed to act**. The result? A staggering **24x uplift in conversion rates** compared to traditional methods.

Campaign 2: Turning Browsers into Depositors

A second campaign focused on a previously unreachable group: **unregistered app users** who had shown interest but never completed the onboarding process. Using Intent Edge, Evest identified the right moment to re-engage these users, prompting them just as intent signals spiked. The outcome was significant: **16% registration conversion** and **33% of new users making a First-Time Deposit**—a critical marker of lifetime value.

Campaign 3: Capitalising on Black Friday

During the high-stakes Black Friday trading window, Evest activated a broad engagement push across both active and dormant users. By targeting optimal micro-moments—times when users were most engaged with markets—Intent Edge drove a **14x increase in CTR** and an **18x uplift in campaign value**.

These were not marginal gains—they were exponential leaps. And all of them were powered by **privacy-safe AI**, engineered to respect data governance while surfacing intent signals that traditional systems miss.

As **Elias Khoury, Director of Growth at Evest**, put it:

> ***"By identifying optimal engagement opportunities, we increased conversions by 24x compared to another solution. This data-driven strategy has unlocked substantial growth potential."***

In a market where speed, relevance, and trust define success, Evest's journey offers a blueprint for modern marketers: **engage when it matters most—or miss the moment entirely**. With Intent HQ, Evest didn't just grow. It accelerated.

About Intent HQ

Intent HQ, headquartered in London, is transforming how brands understand and act on customer intent, redefining the foundation of personalised marketing in the age of AI. We equip businesses with the intelligence to see every customer as an individual: what they like, what they love, and why they act. Powered by patented AI and previously untapped device-level data, we deliver actionable, privacy-safe insights that unlock meaningful customer engagement at scale.

At the core of this innovation is Intent Edge, our pioneering on-device AI technology built specifically for mobile environments. It processes up to 16,000 fresh data points daily from more than 50 in-phone signals — entirely on-device. No personal information is ever extracted or stored. The result is a stream of net-new behavioural insights, generated in real time, without compromising privacy, consent, or compliance.

Intent Edge offers a new level of contextual intelligence, enabling predictive modelling, real-time segmentation, and precise best-moment activation. Seamlessly integrated with existing stacks, it empowers marketers to orchestrate experiences that drive measurable impact, including up to a 24x uplift in engagement.

With over 100 million customer profiles under management, Intent HQ supports some of the world's leading enterprises in turning data into performance. Recognised as AI Company of the Year (2024) and Analytics Company of the Year (2025) at the British Data Awards and listed on the FT1000 three years in a row, we help brands act with clarity, responsibility, and intent — delivering growth through intelligence.

Learn more at www.intenthq.com

About LXA

At LXA, we believe that your marketing and sales team's knowledge and skills should never stand still. Just like software, staying current means running the most up-to-date version of your operating system.

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With over 500+ learning programmes delivered to a global network of 200,000+ professionals across leading brands, agencies, and consultancies, we are proud to shape the future of marketing excellence.

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