

Enterprise Martech Outlook 2026

The definitive peer
benchmarking report for
enterprise consumer brands.

LICENSED EDITION FOR



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The Martech Weekly

THE MARTECH WEEKLY

The Martech Weekly (TMW) is an independent research and intelligence firm focused on the enterprise marketing technology ecosystem. Through original research, buyer intelligence, industry analysis and executive events,

TMW helps enterprise leaders make better technology decisions and gives the companies serving them a clearer understanding of buyer needs, experiences and behavior. Its global community includes more than 6,000 senior Martech leaders across 65 countries.



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He oversees research and intelligence for more than 6,000 senior marketing technology leaders worldwide, translating complex shifts in technology, operating models and customer behavior into practical guidance for executives.

Across 13 years in Martech, Keanu has worked across vendors, consultancies, agencies and research, including advising leading organizations such as Toyota, Vodafone, Pfizer, Vanguard, General Motors Holden and more.



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FOUNDER & CEO

Juan Mendoza is the Founder and CEO of The Martech Weekly, where he leads one of the industry's most influential research and intelligence platforms focused on enterprise marketing technology. Over the past decade, he has established himself as a trusted advisor, researcher, and commentator on the trends shaping Martech, customer experience, and digital transformation.

Juan regularly works with senior leaders across enterprise brands, technology vendors, and service providers to help them navigate the rapidly evolving Martech landscape. His expertise spans Martech strategy, operating models, customer data, and the organizational challenges that sit at the intersection of marketing and technology.

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INSIGHT FROM TEALIUM



Enterprises have never had more data about their customers, but the distance to knowing customers is still out of reach of many. Organizations that are growing can turn what they collect into meaningful steps to engage customers. You see this in the shift from the all-knowing Customer 360 to the Contextual Customer View. You see it in real-time decisioning emerging as a sharp dividing line between the Martech Advantage cohort and everyone else. Data being central to your architecture is not the same as data being useful in the customer's moment. The teams that can't tie Martech to financial outcomes rarely have a measurement problem. A system of record is not the same thing as a system of action, and making that shift is the obvious mandate for 2026. Enterprises need to collect signals as they happen, resolve identity and consent in real time, and deliver trusted context to every channel, model, and agent at the moment of truth. Let the results, not the architecture, be the proof.



Zack Wenthe

Director of Product Marketing & Customer Data Evangelist at Tealium

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Introduction

Martech used to be about the art of the **possible**. Now, it is about the art of the **practical** and **provable**.

Artificial intelligence (AI), warehouse-centric architectures, and decisioning are reshaping enterprise Martech roadmaps. But the strongest signal in this research is not that organizations are adopting this new technology with haste. It is that new capability only creates advantage when the enterprise can prove its value, govern its use, and operationalize it safely at scale.

Enterprise Martech leaders sit at the intersection of marketing, product, technology, data, operations, finance, legal, and customer experience. They are responsible for managing complex technology ecosystems, supporting billions of customer interactions, and ensuring that every major investment can withstand executive scrutiny. In 2026, the pressure is to convert technology into commercial evidence.

40.2%

40.2% of enterprise Martech leaders are unable to demonstrate a clear, measurable contribution from Martech to key financial objectives or accepted financial proxies.

This creates a credibility gap at exactly the moment when AI, data infrastructure and decisioning are increasing the strategic importance – and cost – of the stack.

CENTRAL FINDING

The central finding of this report is that Enterprise Martech Advantage in 2026 is determined primarily by proof, governance discipline, data centrality and operational readiness.

The same pattern appears across the defining themes of the market. AI is moving from experimentation to embedded operations. The Cloud Data Platform is becoming a Martech dependency. Decisioning is shifting from a campaign capability to an enterprise coordination challenge. Composability is becoming more pragmatic, but also more dependent on a governed data foundation. Content operations are becoming the litmus test of Martech maturity.

For enterprise leaders, the practical question is no longer what the market makes possible. It is what the organization is ready to operationalize.

The Enterprise Martech Outlook was created to move beyond industry hype and provide a grounded view of how enterprise consumer brands are building, operating, and evolving their Martech capabilities. The report combines analysis of 417 validated enterprise Martech stacks with detailed survey input from 127 brand-side Martech leaders.

The Enterprise Martech Landscape provides a focused view of the platforms that appear in real enterprise consumer-brand stacks. In a market comprising more than 15,000 Martech platforms, its purpose is to help leaders separate the technologies and innovations that are excelling in the enterprise context from all other solutions.

Throughout the report, we compare companies with strong marketing and customer interaction maturity (The Martech Advantage Cohort) with those that are still building that maturity (The Market Baseline Cohort) to identify the practices that separate high-performing organizations from their peers: demonstration, budget movement, lifecycle governance, AI readiness, data centrality, and decisioning maturity.

In an era defined by technological change, sustainable advantage belongs to the organizations that can make new capabilities measurable, governed, and useful.

Research Methodology & Sample

The Enterprise Martech Outlook 2026 combines two complementary sources of research to provide a detailed view of how enterprise consumer brands are approaching marketing technology.

TECHNOLOGY EVIDENCE

417

MARTECH STACKS

We collected, validated, and analyzed 417 Martech stacks from enterprise consumer organizations via our media properties to understand technology adoption, architectural trends, and platform usage across the market.

LEADERSHIP EVIDENCE

127

BRAND-SIDE LEADERS

We surveyed 127 brand-side Martech leaders (February to June 2026) to understand how enterprise organizations structure teams, manage technology, allocate budgets, measure success, and respond to emerging trends.

DUAL METHODOLOGY

This dual methodology allows us to examine both the technology itself and the organizational realities surrounding it. As such, the report explores not only what technologies enterprise organizations have adopted, but also how they are governed, funded, measured, and operationalized.

STATISTICAL INTERPRETATION

Evidence of association, rather than causation

In addition to descriptive analysis and maturity cohort comparisons, we conducted cross-tab analysis across major survey variables. Where relationships were material to the interpretation, we tested categorical associations using chi-square tests and assessed ordered relationships using Spearman rank correlation. Reported p-values should be read as **evidence of association rather than causation**. Statistical tests are exploratory and p-values are unadjusted for multiple comparisons. Because the survey base comprises 127 respondents and some subgroups are small, segment-level findings are treated as directional unless otherwise stated.

Firmographics

The sample spans a broad cross-section of enterprise consumer brands, ranging from smaller enterprises through to some of the world's largest organizations. This diversity allows us to identify patterns that persist across the market while also highlighting where scale influences Martech strategy, operating models, and technology adoption.

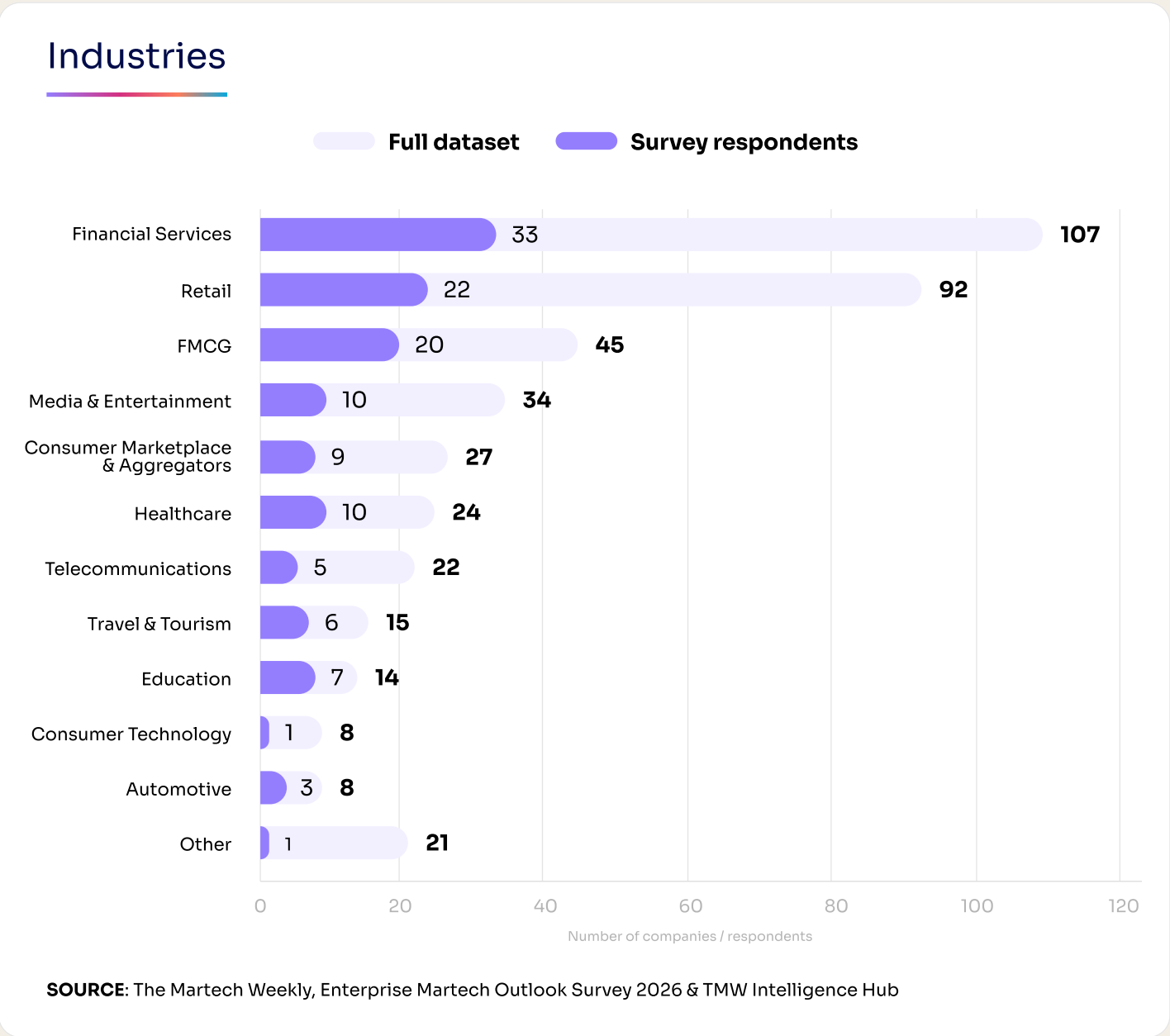


Figure 1: Industry breakdown of the full research sample and survey respondents.

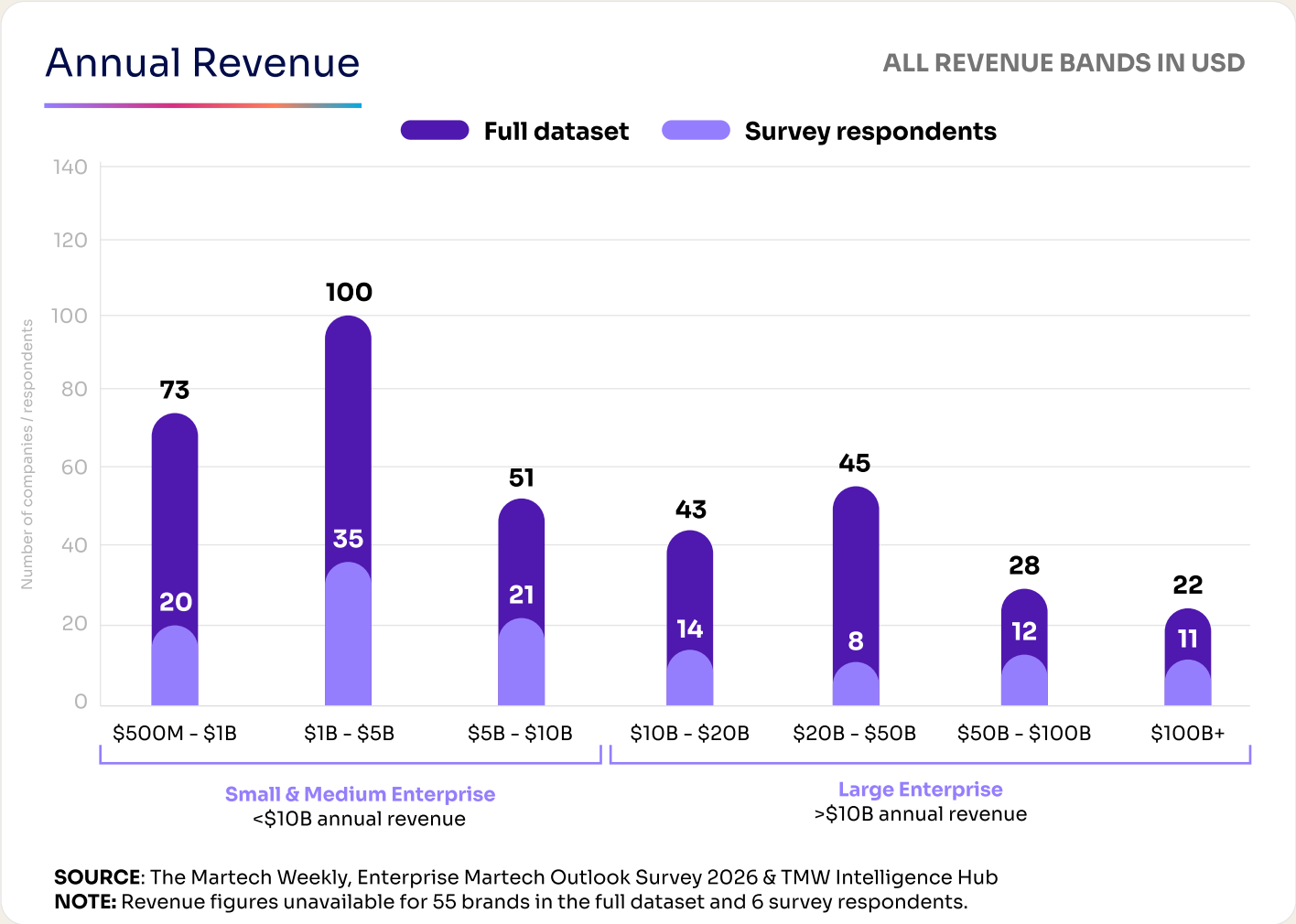


Figure 2: Annual revenue breakdown of the full research sample and survey respondents.

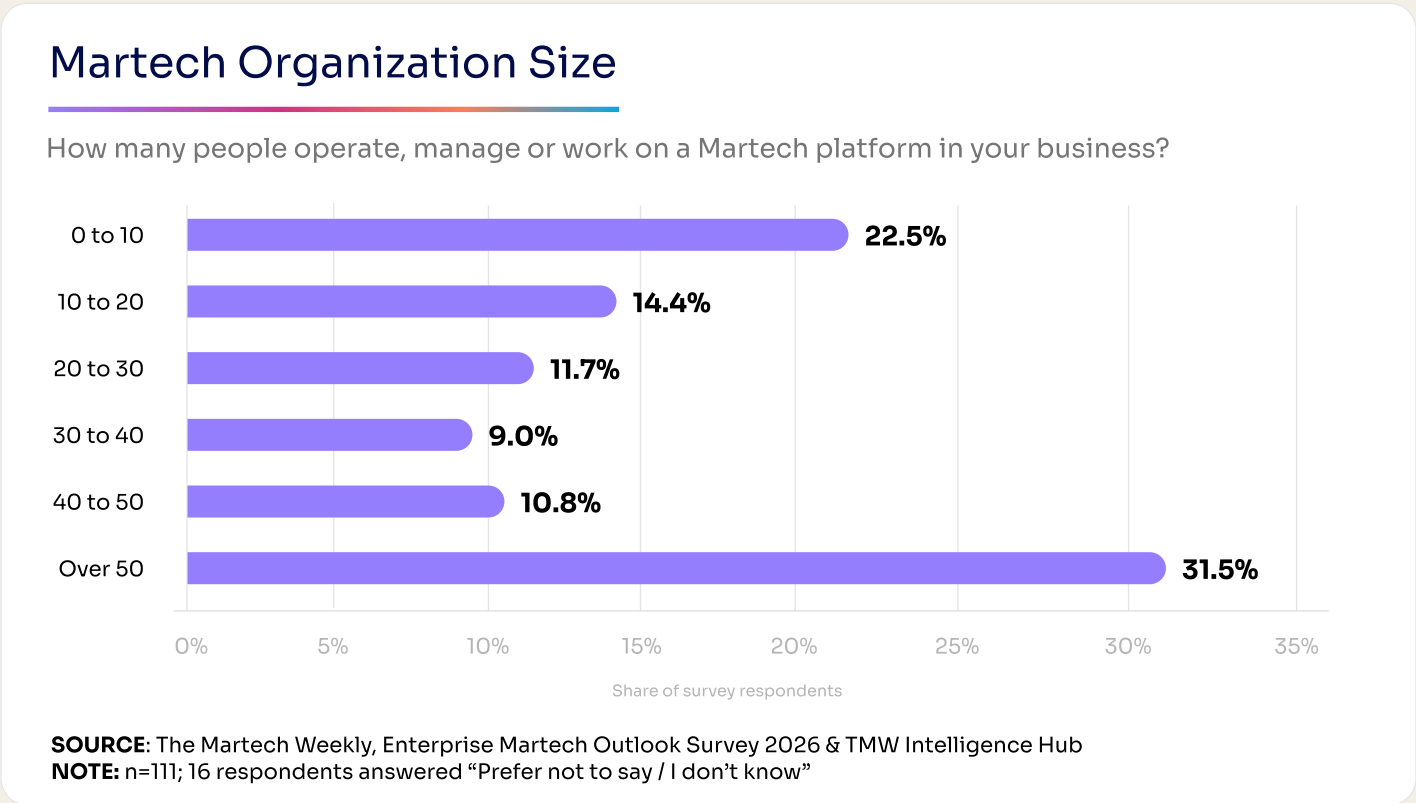


Figure 3: Size of enterprise Martech teams represented in the survey.

Participants

Our participants represent the individuals most directly responsible for Martech strategy, operations, architecture, and governance within their organizations. Their perspectives provide a practical view of the opportunities, challenges, and priorities shaping enterprise Martech in 2026.

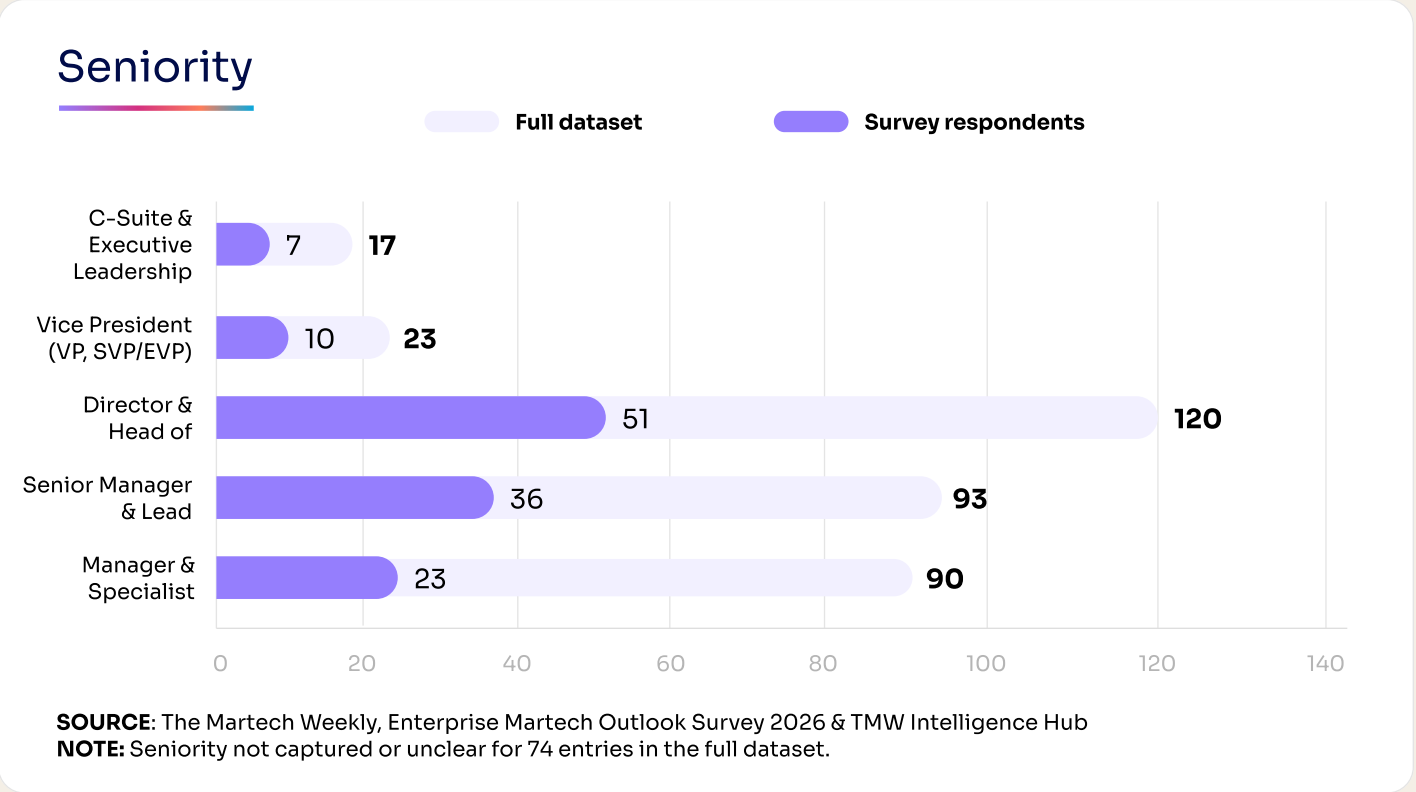


Figure 4: Seniority breakdown of participants in the full research sample and survey.

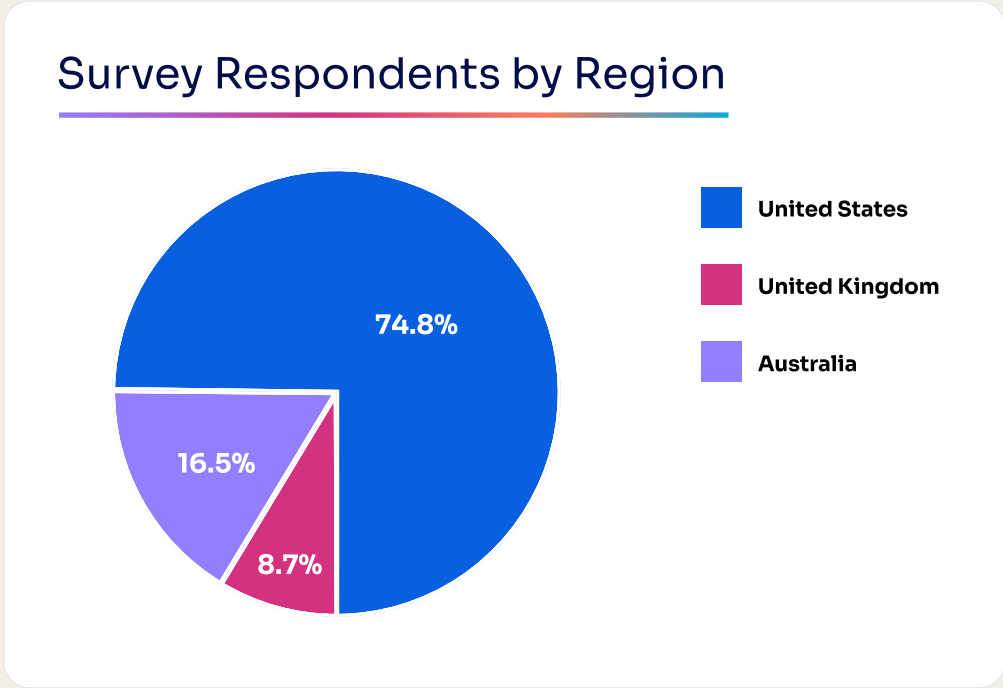


Figure 5: Regional breakdown of Enterprise Martech Outlook survey respondents.

Cohorts: Martech Advantage vs Market Baseline

A recurring theme throughout this report is the comparison between organizations that consistently deliver strong customer experiences and those that continue to face challenges.

To create this lens, survey participants were asked to assess the effectiveness of their organization's marketing and customer interaction outcomes. Based on these responses, organizations were grouped into two cohorts:

MARTECH ADVANTAGE

Organizations rating themselves at the highest levels of marketing and customer interaction maturity.

MARKET BASELINE

Organizations rating themselves as average or at the lowest levels of marketing and customer interaction maturity.

Throughout the report, we compare these cohorts to identify the behaviors, operating models, governance practices, and technology decisions that distinguish high-performing organizations from the rest of the market.

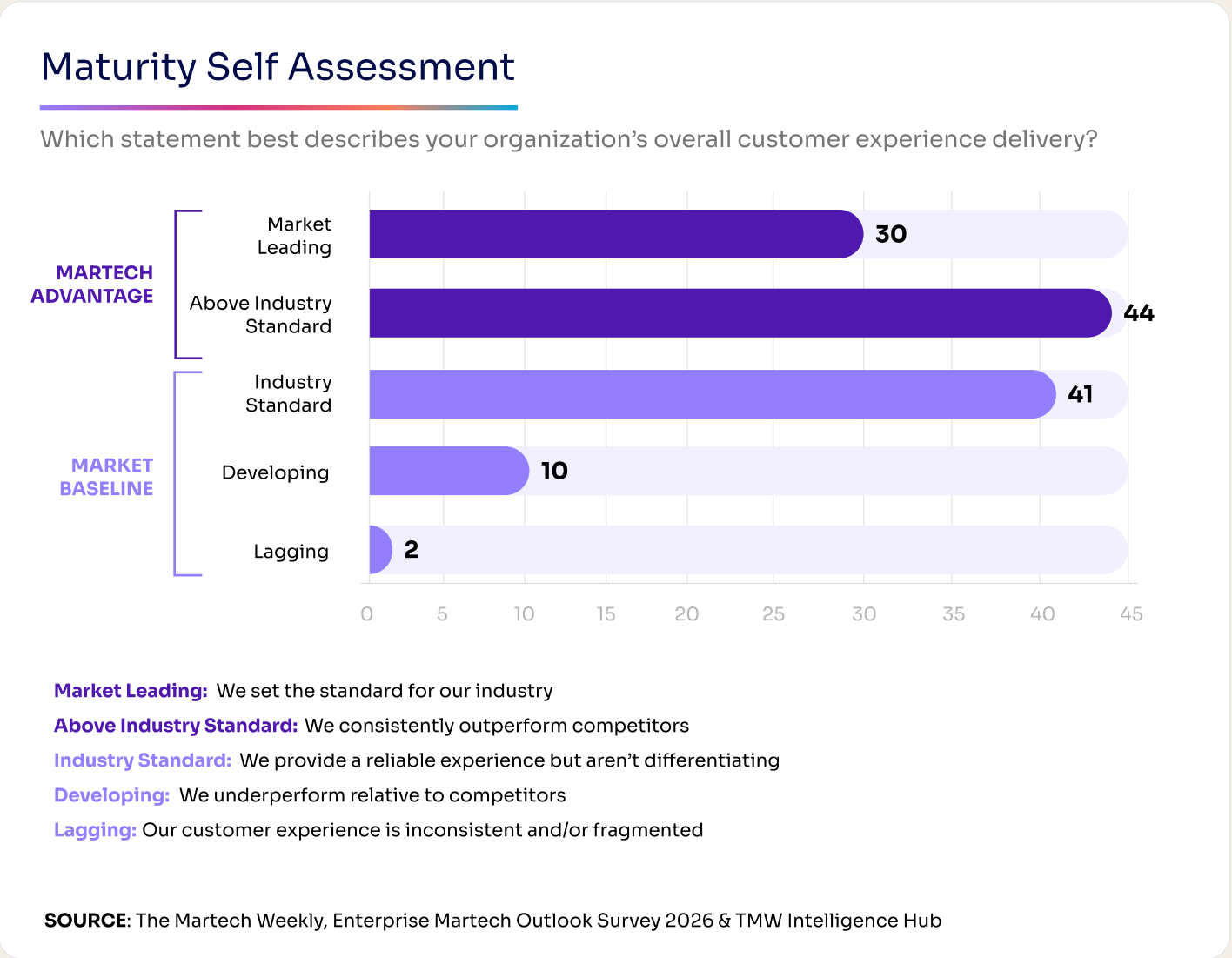


Figure 6: Self-assessed customer experience maturity used to define the Martech Advantage and Market Baseline cohorts.

Inside the Enterprise

When people talk about Martech, the conversation typically gravitates toward technology: AI, composable architectures, decisioning engines, and the latest wave of vendor innovation.

Yet for enterprise organizations, technology itself is only part of the equation.

The success or failure of Martech initiatives is frequently determined by what is happening around the technology rather than within it. Objectives, governance, ideation and creativity, operating models, budget ownership, procurement processes, cross-functional collaboration, and value measurement all play a critical role in determining whether technology investments ultimately deliver meaningful business outcomes based on expectations.

This distinction is becoming increasingly important as Martech enters a new phase of maturity.

Over the past decade, enterprise organizations have invested heavily in customer data, marketing automation, analytics, and digital experience capabilities.

For many brands, the challenge is no longer deciding which technology they should adopt.

The challenge is extracting value from increasingly sophisticated ecosystems while balancing the competing demands of marketing, IT, finance, legal, procurement, and customer experience teams.

In many respects, Martech leadership in enterprise settings has evolved from a technology discipline into an organizational discipline.

The findings in this section reveal that the strongest performing organizations are not necessarily those with the largest budgets or the most sophisticated technology. Instead, they are organizations that have developed effective mechanisms to align people, processes, governance, and technology around common objectives.

To understand what separates these organizations from the rest of the market, we begin by looking inside the enterprise itself: how Martech leaders define success, secure investment, structure teams, manage technology, and demonstrate value.

OBJECTIVES, KPIS, AND DEMONSTRATING VALUE

One of the defining characteristics of enterprise Martech is accountability.

Unlike many areas of marketing, Martech is not judged solely by campaign performance or creative execution. It represents a significant long-term investment in technology, data, infrastructure, and organizational capability. As a result, enterprise Martech leaders are increasingly expected to answer three fundamental questions:

01 What are we trying to achieve?

02 How will we measure success?

03 Can we prove Martech contributed to the outcome?

This section explores how enterprise organizations answer those questions, revealing a surprisingly commercial mindset. Despite the industry's fascination with emerging technology, enterprise Martech is ultimately judged by its contribution to business performance rather than technological sophistication.

The Martech Mandate Is Efficient Growth

The first finding is unequivocal: **enterprise Martech is primarily viewed as a commercial growth engine.**

Top Objectives for Martech

What are the top three objectives for Martech in your organization?

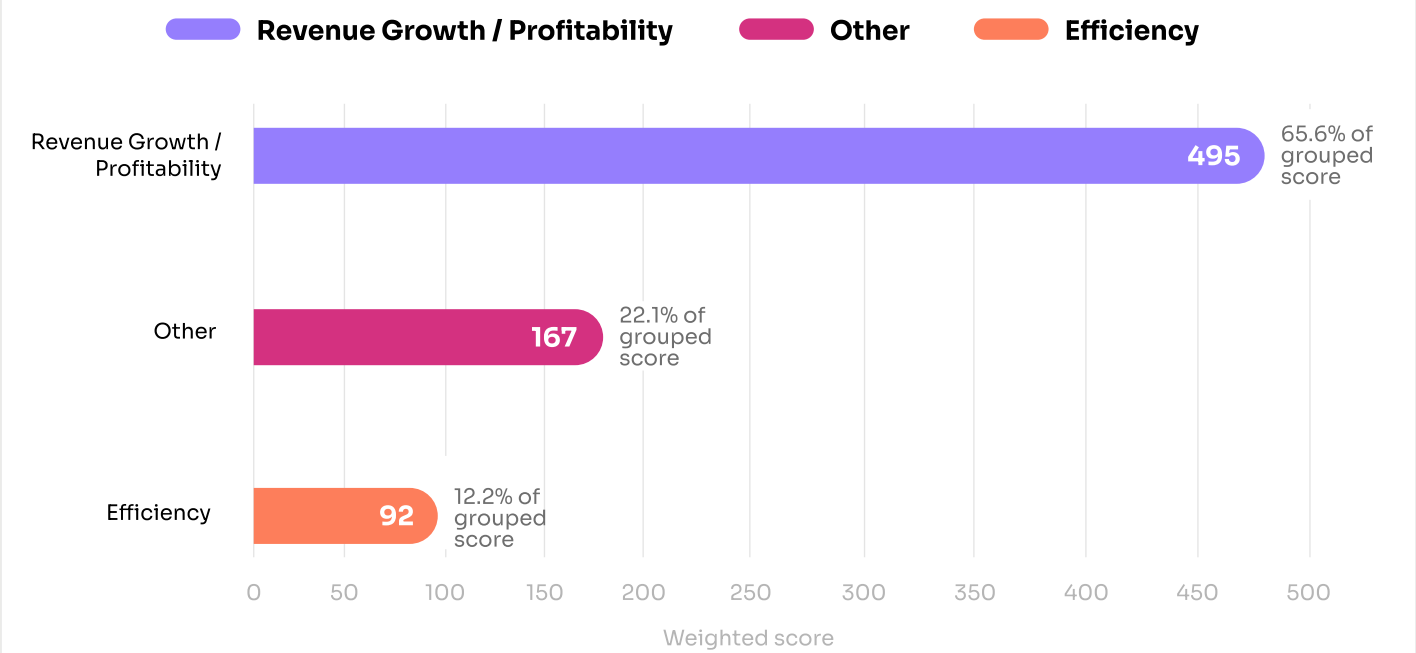


SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub
NOTE: Weighted ranking points · Base n=127 · Rank 1 = 3 pts, Rank 2 = 2, Rank 3 = 1

Figure 7: Strategic objectives enterprise Martech leaders are prioritizing for their Martech investments.

Revenue Growth stands apart as the dominant objective for enterprise Martech teams, significantly outpacing every other priority. While the remaining objectives are more evenly distributed, there is a clear offensive mindset throughout the market. Martech leaders are placing greater emphasis on accelerating revenue, improving customer experience, increasing profitability, and strengthening advertising effectiveness than on reducing cost, mitigating risk, or driving operational efficiencies.

Top Objectives for Martech by Category



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 8: Enterprise Martech objectives grouped by revenue growth and profitability, efficiency, and other categories using weighted top-three rankings.

This reflects an important shift in how enterprise organizations justify Martech investment. Rather than positioning technology as an efficiency initiative, Martech leaders frame Martech as a strategic growth function capable of driving measurable commercial outcomes.

The composition of the top five objectives also reveals something deeper. Revenue Growth may dominate, but Customer Experience, Profitability, Customer Retention, and Advertising Effectiveness all rank highly alongside it. Together, these objectives describe a business seeking not simply to acquire more customers, but to build more valuable and more profitable customer relationships over time.



This finding illustrates both the pressure on Martech leaders to generate new revenue, and an opportunity to improve their knowledge of customer economic theory. The evidence shows, perhaps ironically, that companies with a sales orientation diminish actual sales propensity - and that automating price-based promotion erodes both brand and profit. Martech leaders can temper these internal pressures with improved literacy in customer economics, a focus on profit over income, and good stakeholder management.

Aarron Spinley, Fellow at The Field Bell Institute

The Efficiency Paradox

For the last few years, the industry narrative surrounding Martech has centered on efficiency. AI promises productivity gains, automation promises lower operating costs, and platform consolidation promises leaner technology stacks.

Our research tells a different story.

Despite the attention efficiency receives across the industry, efficiency objectives rank among the lowest strategic objectives for enterprise Martech leaders, with just 12.2% of the total grouped score.

Enterprise organizations are certainly looking for operational improvements, but they are not investing in Martech simply to spend less. They are investing to grow faster, retain customers longer, and create stronger commercial outcomes. Efficiency is increasingly viewed as an enabler of growth rather than the objective itself.

EFFICIENCY OUTCOMES

12.2%

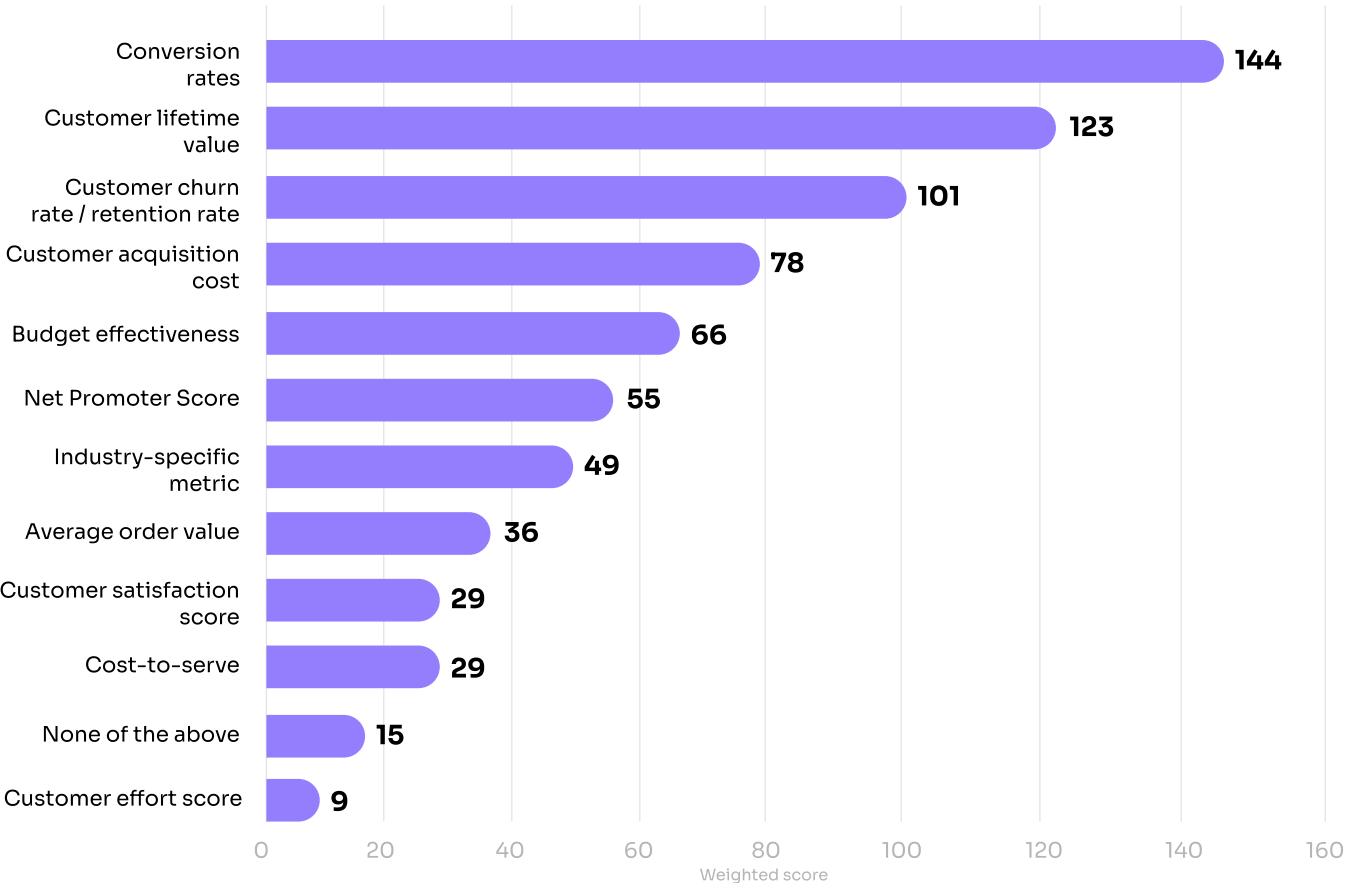
of weighted top-three objective points went to efficiency outcomes

Enterprise Martech is Measured Through Customer Economics

Objectives define intent, but KPIs determine accountability.

Top KPIs for Martech

What are the top three metrics that Martech is measured by in your organization?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub
NOTE: Weighted ranking points · Base n=127 · Rank 1 = 3 pts, Rank 2 = 2, Rank 3 = 1

Figure 9: Primary KPIs enterprise Martech leaders use to measure Martech performance.

While revenue growth dominates strategic objectives, the metrics used to judge Martech performance offer a far more balanced narrative.

Conversion Rate ranks as the most common KPI, reflecting the emphasis on revenue generation. However, it is closely followed by Customer Lifetime Value, Churn and Retention Rate, Customer Acquisition Cost, and Budget Effectiveness. Together, these measures paint a picture of Martech as the engine powering sustainable growth across the entire customer lifecycle, rather than simply generating short-term revenue.

The more useful finding is how enterprise leaders are assembling a **spend-defense measurement bundle**.

For leaders defending Martech spend, the strongest KPI architecture is not a single measure, but a bundle of unit economics: CLV and retention for customer value, CAC, and conversion for acquisition efficiency, and budget effectiveness or cost-to-serve where automation is expected to reduce operational drag.

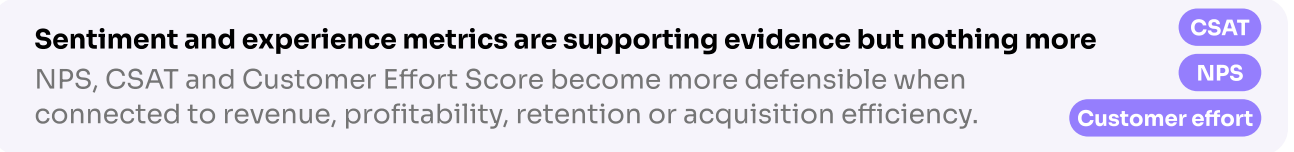
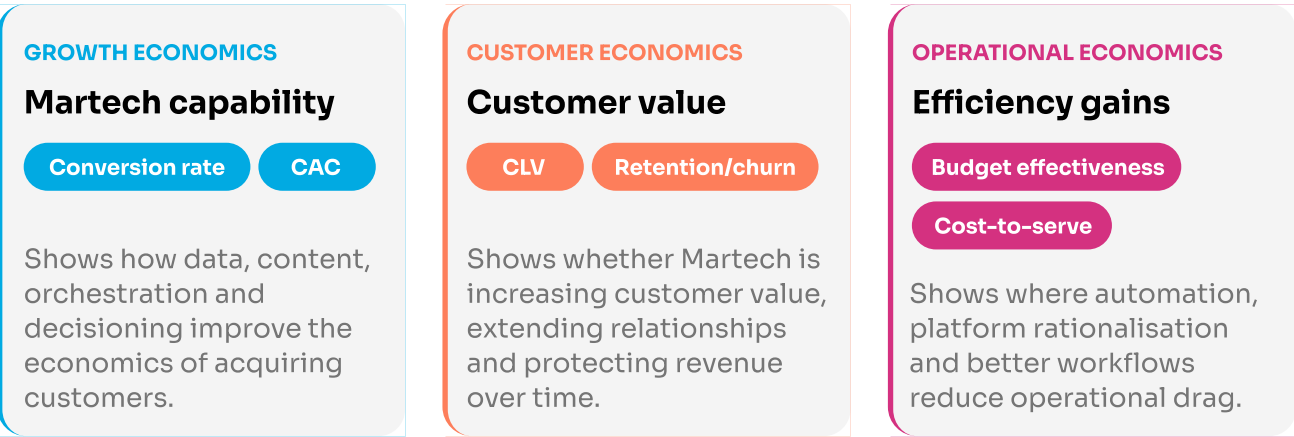
Martech KPI Framework

How enterprise Martech leaders turn capability into commercially defensible value proof.



The spend-defense measurement bundle

Not one heroic metric, but a set of linked unit-economics that make Martech value harder to dismiss



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 10: Martech KPI framework connecting Martech capability to commercially defensible value proof.

This suggests enterprise organizations increasingly judge customer experience through customer behavior rather than sentiment alone. NPS, CSAT, and Customer Effort Score still matter, but they become more defensible when connected to revenue, profitability, retention, or acquisition efficiency.

Customer Acquisition Cost deserves attention because it turns Martech from a channel-support function into part of the enterprise growth equation. Even when acquisition is owned elsewhere, Martech leaders can use CAC, conversion, and CLV to show how data, orchestration, content, and decisioning improve the economics of growth.

Many Martech Teams Operate on Faith-Based Value Demonstration

Objectives establish ambition. KPIs establish accountability. Neither matters unless organizations can demonstrate that Martech contributed to the outcome.

This is where our research uncovers a significant finding.

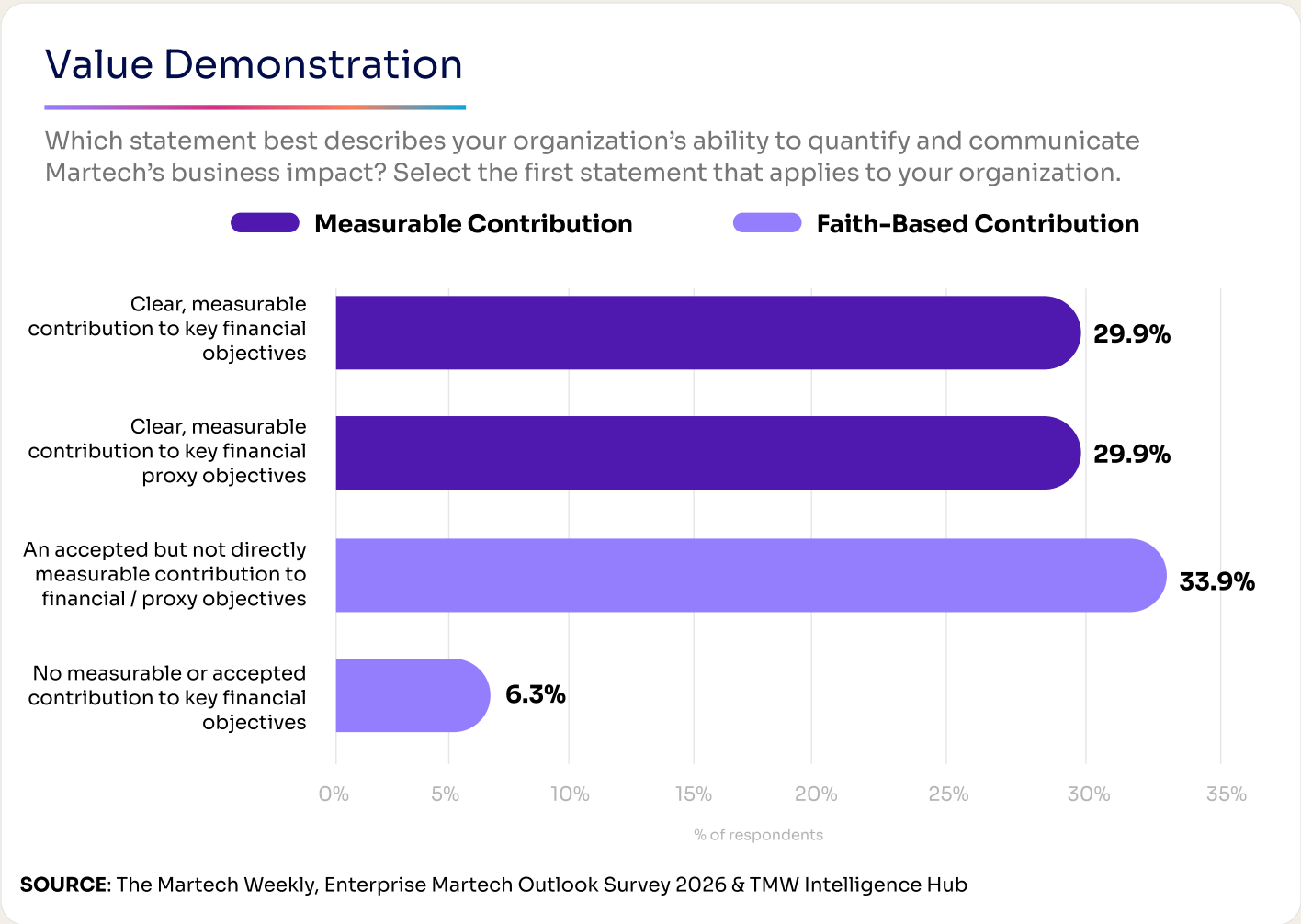


Figure 11: Ability of enterprise Martech leaders to demonstrate Martech’s contribution to financial or financial-proxy objectives.

While executive leadership expects Martech to deliver measurable commercial outcomes, **40.2%** of enterprise Martech leaders are unable to demonstrate a clear financial contribution from their technology investments.

The largest single cohort of respondents report that Martech makes an accepted – but not directly measurable – contribution to financial objectives or their accepted proxies. Combined with those unable to demonstrate any meaningful contribution, this reveals a substantial proportion of enterprise organizations operating on what can best be described as **faith-based value demonstration**.

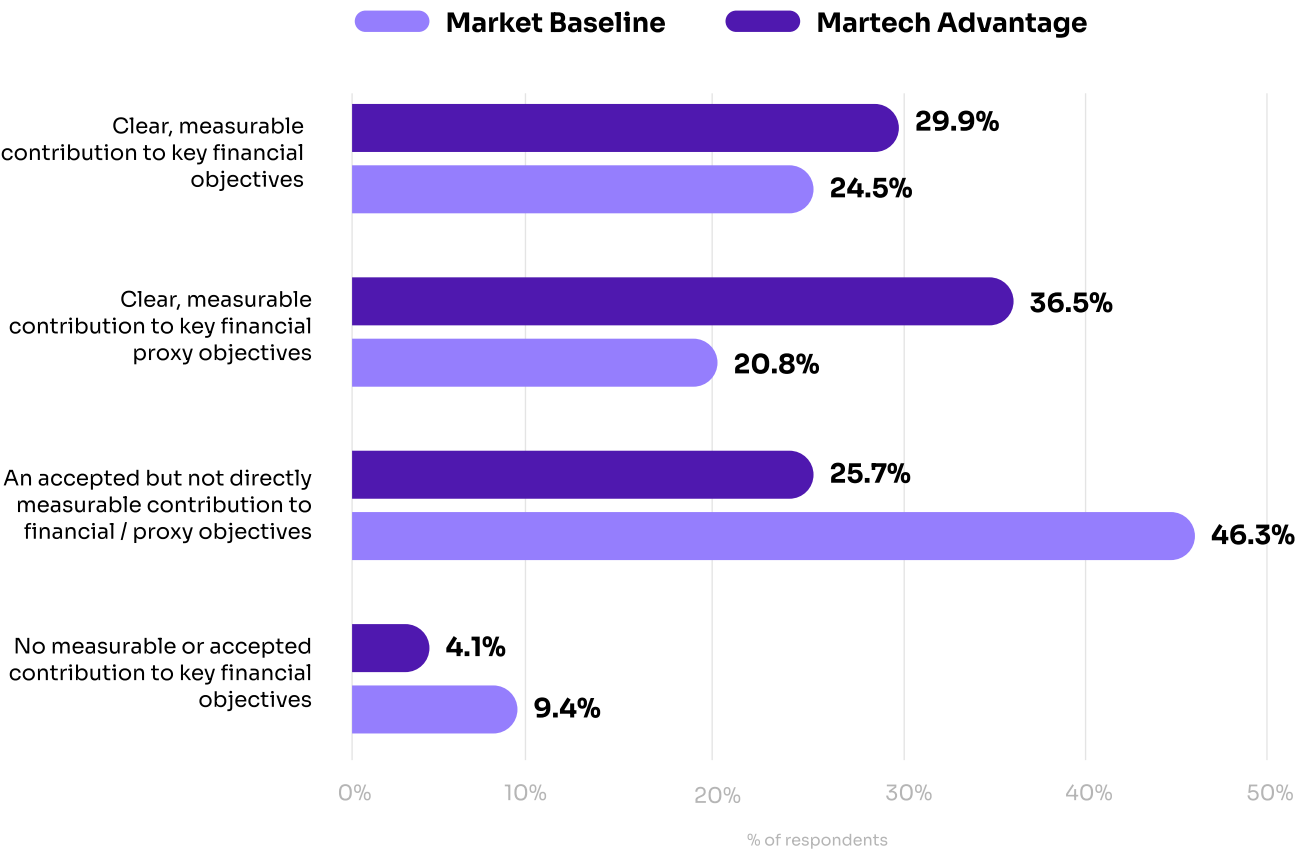
Martech is widely believed to create value, but many organizations simply cannot prove it.

In an environment where boards, CFOs, and executive leadership teams are demanding greater accountability for technology investment, this creates a significant strategic vulnerability. Trust remains important, but trust alone becomes increasingly difficult to defend when budgets tighten or investment priorities shift.

The data also demonstrates that value measurement is one of the clearest differentiators between high- and low-performing organizations.

Value Demonstration

Which statement best describes your organization’s ability to quantify and communicate Martech’s business impact? Select the first statement that applies to your organization.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 12: Ability to demonstrate Martech value: Martech Advantage vs Market Baseline.

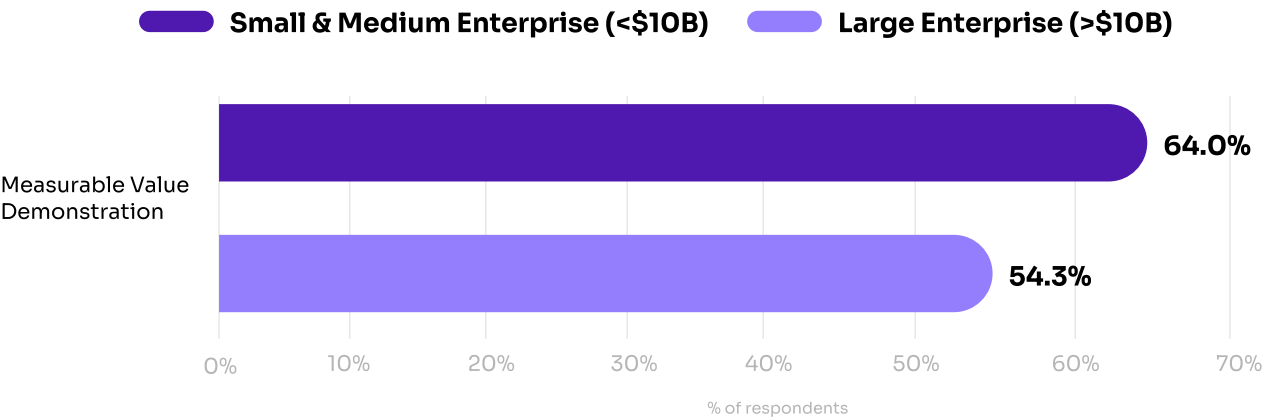
Martech Advantage organizations are significantly more likely to demonstrate a measurable contribution from Martech than Market Baseline organizations, suggesting that robust measurement capability is more than a reporting exercise.

It is a defining characteristic of organizational maturity.

A second trend emerges when analyzing **enterprise size**.

Value Demonstration

Which statement best describes your organization’s ability to quantify and communicate Martech’s business impact? Select the first statement that applies to your organization.



Measurable Value Demonstration combines:
Clear, measurable contribution to key financial objectives +
Clear, measurable contribution to key financial proxy objectives

SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 13: Ability to demonstrate Martech value by enterprise revenue band.

As organizations grow, demonstrating Martech's financial contribution becomes increasingly difficult. More stakeholders, channels, data sources, and greater organizational complexity all make attribution significantly harder. Plus, there can be more places to hide from accountability. Ironically, the organizations making the largest Martech investments often struggle most to prove their value.



The actual profession of Martech leaders is this: The venture capitalist inside the enterprise.

Enterprise Martech is an investment discipline. Leaders need commercial objectives, business-outcome KPIs, and credible value proof, not platform metrics alone. As executive scrutiny increases, the ability to connect Martech to financial outcomes is a core maturity marker.

Juan Mendoza, Founder & CEO at The Martech Weekly

Budgets

If Martech is now an investment discipline, **budget** is where that discipline is tested.

For the purposes of this research, Martech budget refers to the comprehensive investment required to operate and advance the Martech function, including technology platforms, implementation partners, data costs, specialist services, internal and external support, AI initiatives, and the talent required to manage these capabilities.

Enterprise Martech leaders are not operating in a low-scrutiny environment. CFOs are closely examining software spend, procurement teams are challenging platform overlap, and executive leadership teams are demanding clearer evidence that technology investments contribute to business outcomes. In this context, securing budget is no longer simply a function of ambition but credibility.

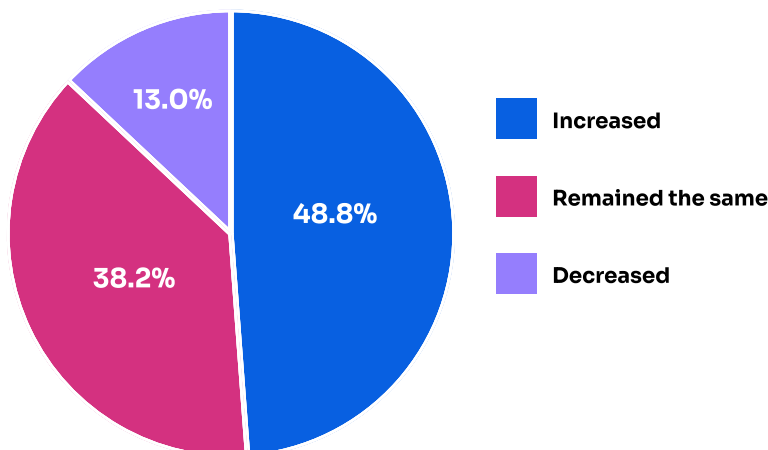
Our research shows that, despite macroeconomic pressure and the persistent “do more with less” narrative, enterprise Martech budgets are proving more resilient than expected.

Nearly half of surveyed Martech leaders report that their 2026 budget has increased compared to 2025.

When combined with the 38.2% whose budgets have remained stable, 87.0% of enterprise Martech leaders are operating with flat or expanding resources. Only 13.0% report budget reductions.

Budget Change

How does your 2026 Martech budget compare to 2025?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026

This does not mean enterprise Martech leaders are free from financial pressure.

A flat budget is not the same as an unchanged operating environment. According to Vertice's [SaaS Inflation Index](#), SaaS inflation reached 13.2% in Q1 2026. For Martech leaders managing complex enterprise stacks, this represents a real impact: A \$10 million Martech stack exposed to similar software inflation would require approximately \$1.32 million in additional budget simply to maintain equivalent purchasing power.

In other words, **a flat budget can still feel like a cut.**

Figure 14: Change in enterprise Martech budgets from 2025 to 2026.

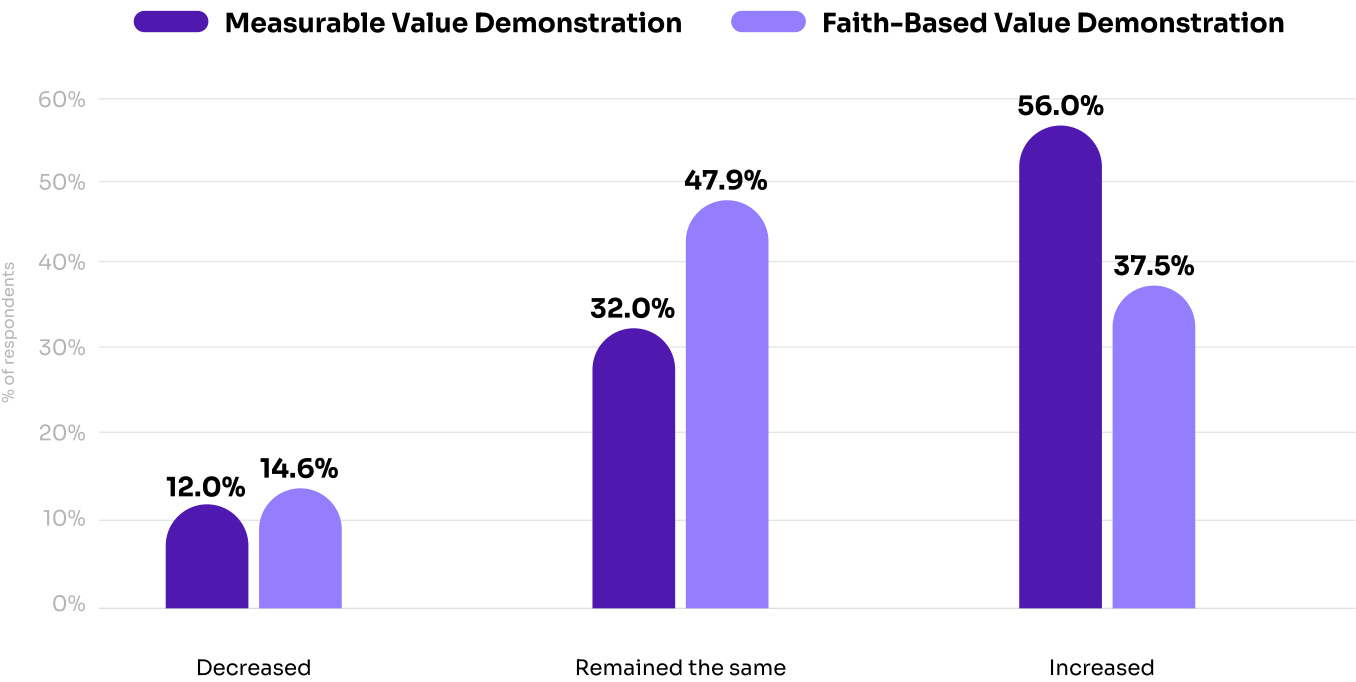
The data therefore points to a more nuanced reality: enterprise Martech is not being broadly defunded, but it is being forced to justify itself rigorously. Budget stability may provide continuity, but it does not eliminate the pressure to rationalize platforms, challenge renewals, manage overlap, and ensure that every major investment can be defended in commercial terms.

Proof Protects Budget

Budget growth is not evenly distributed across the market. The clearest determinant is **value demonstration**.

Budget Change

How does your 2026 Martech budget compare to 2025?
Comparison by whether companies can prove Martech's measurable value.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 15: Change in Martech budget by strength of Martech value demonstration.

Martech leaders who can demonstrate a measurable contribution to financial objectives, or accepted financial proxies, are significantly more likely to secure budget increases. Among organizations with stronger value demonstration, 56% received an increased budget for 2026. Among those still relying on faith-based value demonstration, only 37.5% received an increase.

The implication is clear: value proof is a funding advantage.

In previous budget cycles, Martech teams may have been able to rely on strategic importance, executive belief, or broad digital transformation mandates to justify continued investment. In 2026, those arguments are becoming less sufficient. Organizations that can connect Martech to revenue, profitability, retention, acquisition efficiency, or other accepted financial outcomes are better positioned to defend and expand their budgets.

Those that cannot are exposed.

18.5pp

THIS CREATES AN 18.5 PERCENTAGE-POINT FUNDING PREMIUM FOR ORGANIZATIONS THAT CAN PROVE MARTECH VALUE.

BUDGETS

This is a political and financial issue more so than a measurement issue. When budget pressure increases, the teams with the strongest evidence base are the ones best equipped to make the case for continued investment.



Budgets grow when tech cuts waste. I secure funding by consolidating vendors and using AI to eliminate overlapping services. Every dollar must drive incremental revenue or clear operational efficiency. By continuously sharing documented, data-driven successes calculated around metrics stakeholders care about, the value is undeniable. Prove that a streamlined stack reduces headcount dependency and squeezes more value from existing data, and your budget becomes an easy win.

Patrick Zinga

Media Lead at Amazon Shipping, UK



Nothing earns the next dollar like command of the last one. The leader who can explain exactly what every tool costs, what it delivers, and what they'd cut tomorrow if they had to, is the person finance trusts with more. Budget generally isn't won in the 2 weeks before it's decided; it's won in the year prior through prudent, competent management and demonstrable value. Credibility compounds; vague enthusiasm at the ask is a Hail Mary.

Troy Muir

Director of Marketing Ops at Keypath | Founder at StackOverlap

AI Budget Gravity

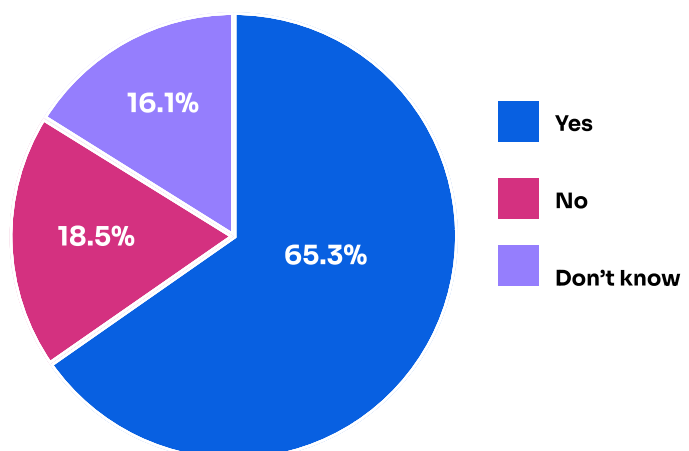
The second major force shaping Martech budgets is **AI**.

While many organizations continue to scrutinize traditional software spend, AI has created a new category of strategic investment. For many enterprise teams, AI is being funded as a distinct transformation priority.

Two-thirds of surveyed organizations report having a dedicated budget for AI. This is one of the sharpest signals that AI has moved beyond experimentation and into structural investment planning.

Dedicated AI Budget

Does your organization have a dedicated budget for AI investments?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026

Figure 16: Share of enterprise organizations with a dedicated budget allocated to AI initiatives.

BUDGETS

Dedicated AI budget matters because it changes the funding conversation. When AI investment is treated separately from business-as-usual Martech spend, it creates new capital pathways for tooling, data infrastructure, specialist talent, governance, and implementation support.

This suggests that enterprise organizations are beginning to institutionalize AI. Rather than treating AI as a series of isolated pilots, many are preparing to build, operate, and govern AI capabilities as part of their long-term technology and customer experience infrastructure.

However, this also raises the bar for Martech leaders.

AI may unlock new funding, but it also intensifies expectations. Leaders receiving dedicated AI investment will be expected to show how that investment improves productivity, accelerates execution, enhances customer experience, or contributes to measurable financial outcomes. The same value demonstration challenge that applies to the broader Martech stack will increasingly apply to AI initiatives as they move from pilot to production.



Tokenomics is becoming AI’s budget tax. Costs no longer scale by seats or licenses; they scale by prompts, context windows, retrieval calls and agent loops. That makes spend harder to forecast and easier to lose control of. The lesson for Martech leaders is this: dedicated AI budget is not enough. AI needs usage governance, cost controls and a sharper view of whether token burn is creating business value.

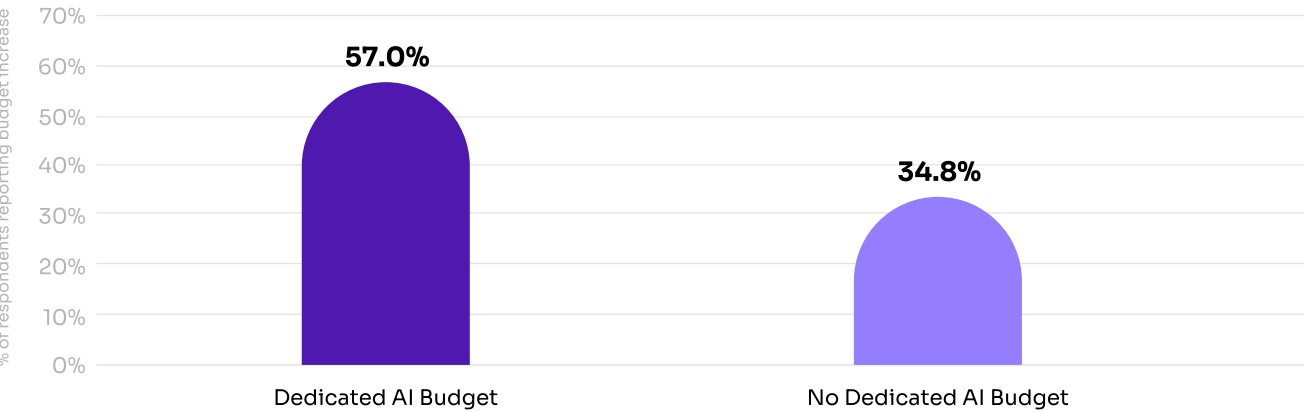
Juan Mendoza, Founder & CEO at The Martech Weekly

Research Insight

Enterprise Martech budgets are conditional. Teams with stronger value proof are more likely to secure increases. However, AI creates **new funding pathways** that help to grow Martech’s overall budget.

AI Budget & Martech Budget Growth

Organizations reporting an overall 2026 Martech budget increase by dedicated AI budget status. Excludes ‘Don’t know’ and unanswered responses.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 17: Share of organizations reporting a 2026 Martech budget increase by dedicated AI budget status.



AI budgets can live in tech, marketing, or the C-suite; it doesn't matter to me. What matters is that AI is never treated as a tech project. The companies getting real results have business and technology working as genuine partners: business ownership to tie every initiative to the company priorities and drive adoption, tech to assess tools, architecture, and security. Without that joint accountability, you get AI for AI's sake.

Linda Cereda

Former Global VP Marketing Data at Nike, AI Advisor

Operating Model

If budget determines what enterprise Martech teams can invest in, operating model determines whether that investment can be turned into execution.

For years, enterprise organizations have wrestled with a familiar structural tension.

Centralized models provide control, consistency, governance, and operational discipline, but can become slow or disconnected from local market needs.

Decentralized models give business units and regional teams greater autonomy, but can quickly create duplication, inconsistent data practices, fragmented customer experiences, and uncontrolled technology sprawl.

The data shows enterprise Martech is rarely a simple binary in terms of operating model.

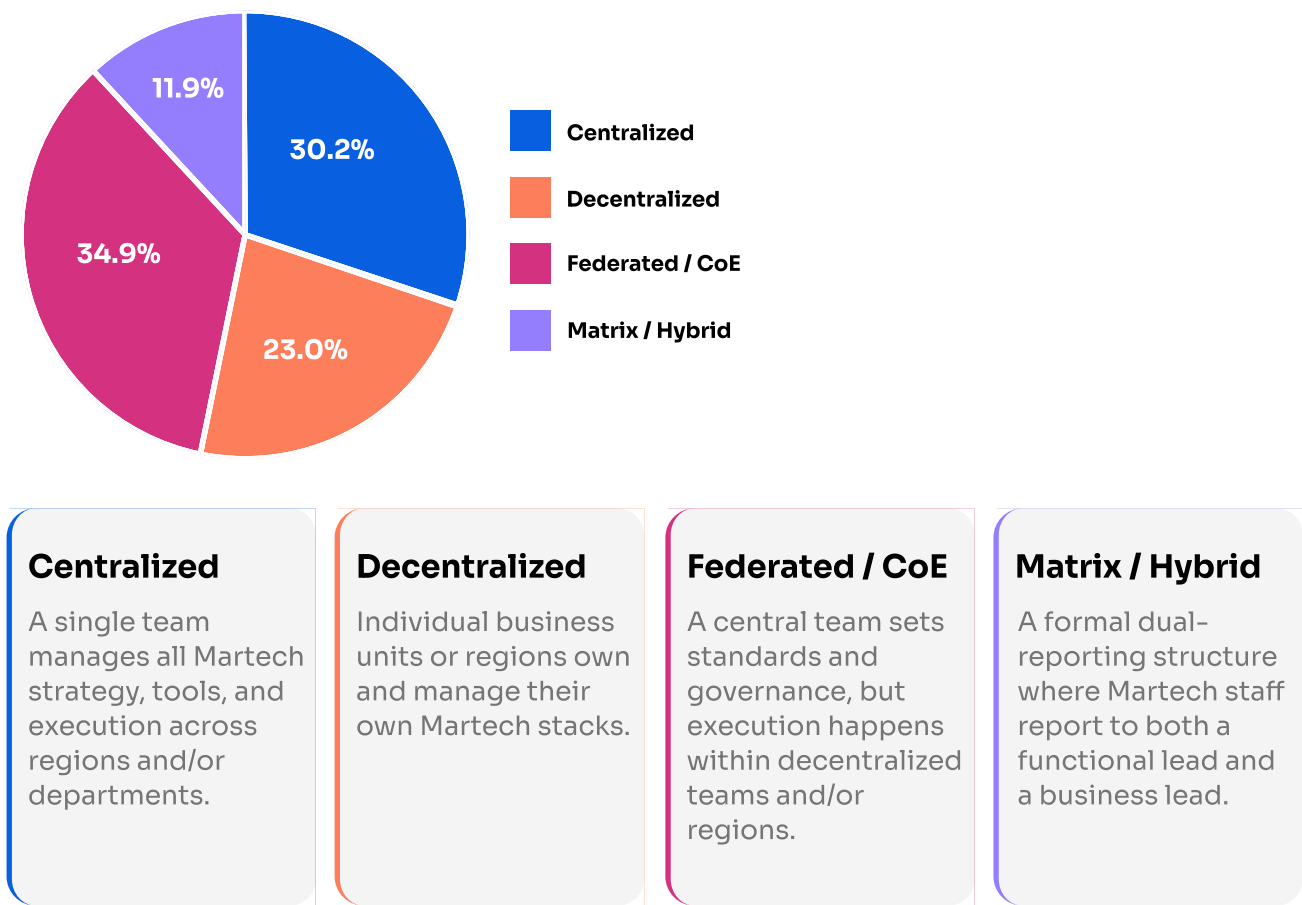
The market is concentrated around a pragmatic middle ground: enough central control to govern complexity, with enough distributed capability to support speed, relevance, and local execution.

Governed Flexibility at Scale

Enterprise Martech operating models are no longer simply about who owns the technology. They are about how organizations balance control and agility.

Operating Model

Which of the following statements best describes the operating model for Martech in your organization?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 18: Primary operating model used to manage Martech within enterprise organizations.

The most common operating model among enterprise consumer brands is now the Federated / Center of Excellence model, adopted by 34.9% of surveyed organizations. Centralized models follow closely at 30.2%, while Decentralized and Matrix / Hybrid approaches account for the remainder of the market.

Taken together, Centralized and Federated models represent 65.1% of enterprise organizations. This is significant. Nearly two-thirds of the market believes that managing Martech at enterprise scale requires a strong central layer of coordination, governance, and oversight.

This does not mean local autonomy is disappearing. It means **autonomy is increasingly designed within a governed system.**

OPERATING MODEL

In enterprise consumer brands, Martech now touches customer data, privacy, consent, analytics, personalization, content operations, decisioning, and AI. These capabilities cannot be left entirely to local preference or disconnected functional ownership. At the same time, they cannot be managed so centrally that business teams lose the ability to move at market speed.

This is the logic of the Federated model: centralize the standards, guardrails, governance, and strategic capabilities; distribute execution, local adaptation, and business-unit expertise.



Freedom to experiment could definitely be a factor. We're also seeing an interesting approach with organizations trending toward hybrid or hub-and-spoke approaches with central governance/platform + distributed execution as it relates to AI adoption. The reliance on 3rd-party agencies to provide a 'safe' and tested means of easing into AI use cases. The value of this approach is at a larger scale: 3rd-party agencies are able to build AI models that support very complex operating models using shared cost agreements with clients. The benefits are cross-industry learnings and best practices. These 3rd-party partners also have the ability to resource the necessary skills and AI capabilities much quicker, have diverse industry exposure, and can introduce best practices at a faster rate.

Agness Gaadi, Former Global Head of Marketing Operations at Ford



Some of our international teams work decentralized, but in general: Our hybrid model centers around our core team in the USA but gives the flexibility to our global teams to adapt to local markets.

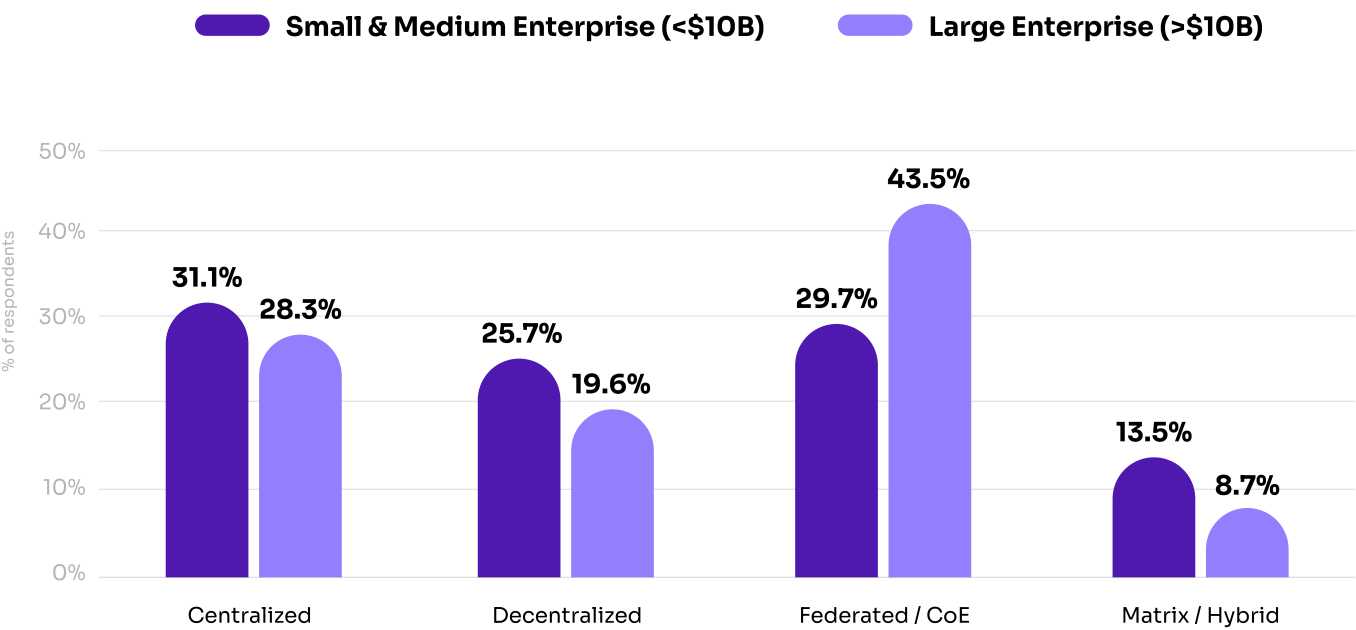
Ben Craumer, Sr Product Manager, Content & Marketing at The Hershey Company

Scale Favors Federation

Operating model choice is heavily shaped by enterprise scale.

Operating Model

Which of the following statements best describes the operating model for Martech in your organization?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 19: Primary Martech operating model by enterprise revenue band.

Smaller enterprises show a more even spread across operating models. This is understandable. When organizations are smaller, fewer markets, brands, teams, and business units need to be coordinated. Direct central control or local autonomy can both remain workable for longer.

But as organizations grow, complexity compounds.

Large enterprises face more markets, customer segments, compliance requirements, data sources, technology overlap, and stakeholders with a legitimate claim on Martech decision-making. At this scale, purely Centralized models can become bottlenecks, while Decentralized models can become ungovernable.

The data demonstrates that crossing the large-enterprise threshold pushes organizations toward a Federated / Center of Excellence model. Federation becomes the structural response to scale: a way to maintain enterprise-wide standards without forcing every decision through a single central team.

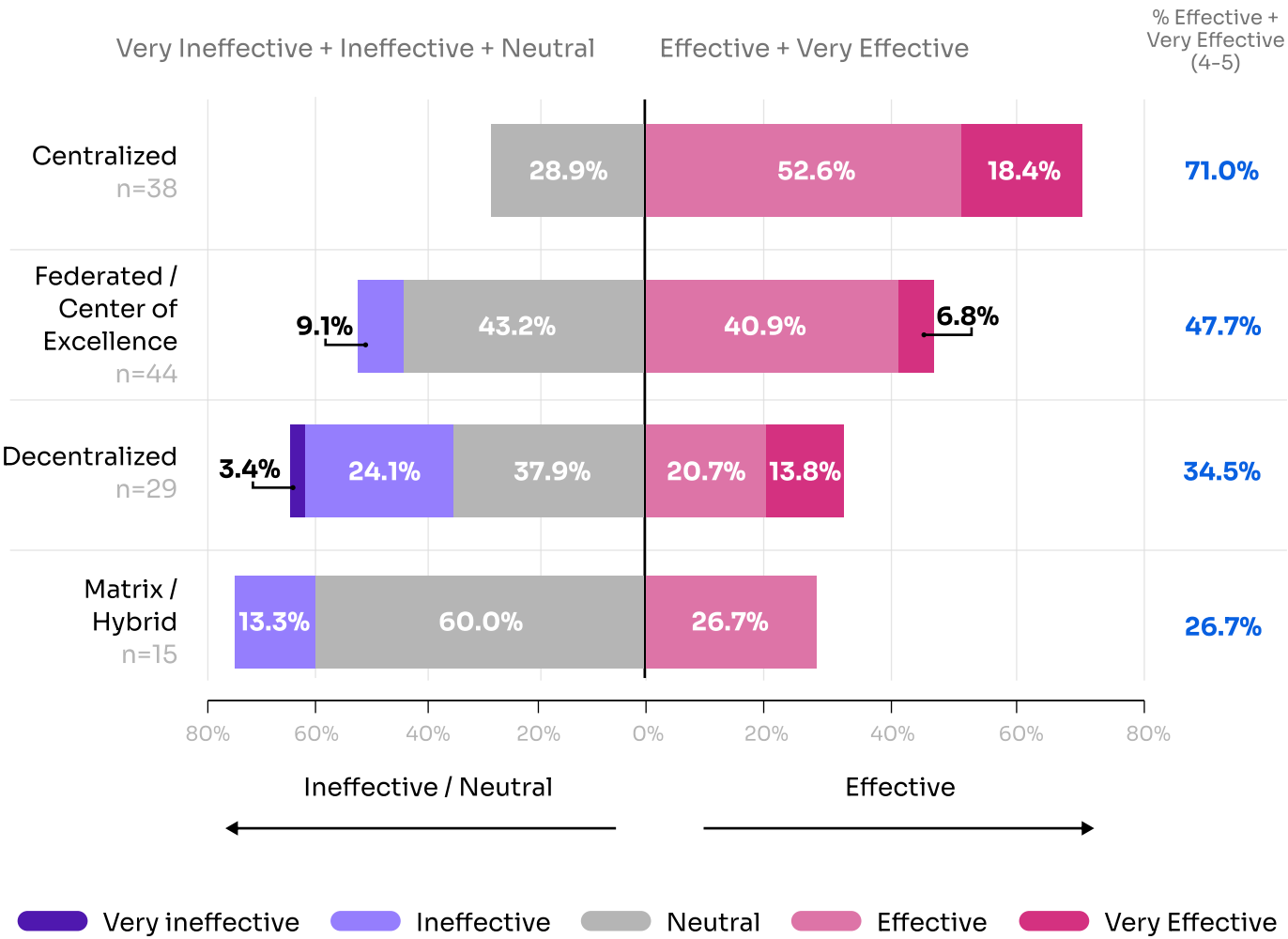
This is the most meaningful split in the operating model data. When comparing **Martech Advantage** and **Market Baseline** organizations, our research did not identify a significant difference in operating model selection. The stronger signal is organizational scale. As enterprises become larger, federation becomes less a matter of preference and more a structural response to complexity.

The Centralization Confidence Paradox

Although the Federated / Center of Excellence model is now the most common operating model, Centralized models appear to generate the strongest confidence in Martech management effectiveness.

Operating Model Effectiveness

On a scale of 1-5, rate how effectively your operating model works for your organization in terms of delivering consistently excellent marketing and customer management.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 20: Perceived effectiveness of Martech management by operating model.

Among organizations operating with a Centralized model, 71% rate their approach as Effective or Very Effective. Notably, no respondents using a Centralized model rated it as ineffective.

This creates an important paradox.

Federated models may be more popular, particularly among larger enterprises, but Centralized models currently produce the strongest confidence in execution. The reason is likely structural. Centralized models create clearer ownership, more consistent governance, tighter control over data standards, and a stronger ability to enforce platform strategy across the organization.

The Centralization Confidence Paradox

In complex enterprise environments, ambiguity is expensive. When no one knows who owns the stack, who governs data, who approves tools, or who is accountable for outcomes, Martech performance suffers. Centralized models reduce that ambiguity.

However, the lesson is not that every enterprise should become fully Centralized. Rather, the data suggests that Federated models must borrow the best features of centralization if they are to succeed. Strong governance, clear decision rights, consistent standards, and visible accountability cannot be optional. They are the conditions that allow federation to work.



I've found that the federated model works because it gives teams the freedom to solve problems in ways that make sense for their part of the business. They don't have to wait for every decision, but they're still working within the same standards. In my experience, that balance helps teams move faster, stay aligned, and avoid creating different ways of doing the same work.

Carlos Tevez, Editorial Director at Moody's

AI Pushes Enterprises Toward Federated Governance

As part of this research, we asked respondents a separate question about the operating model used to manage AI adoption. This was designed to identify whether AI is being governed through the same structure as broader Martech operations, or whether it is forcing organizations to adjust their operating model.

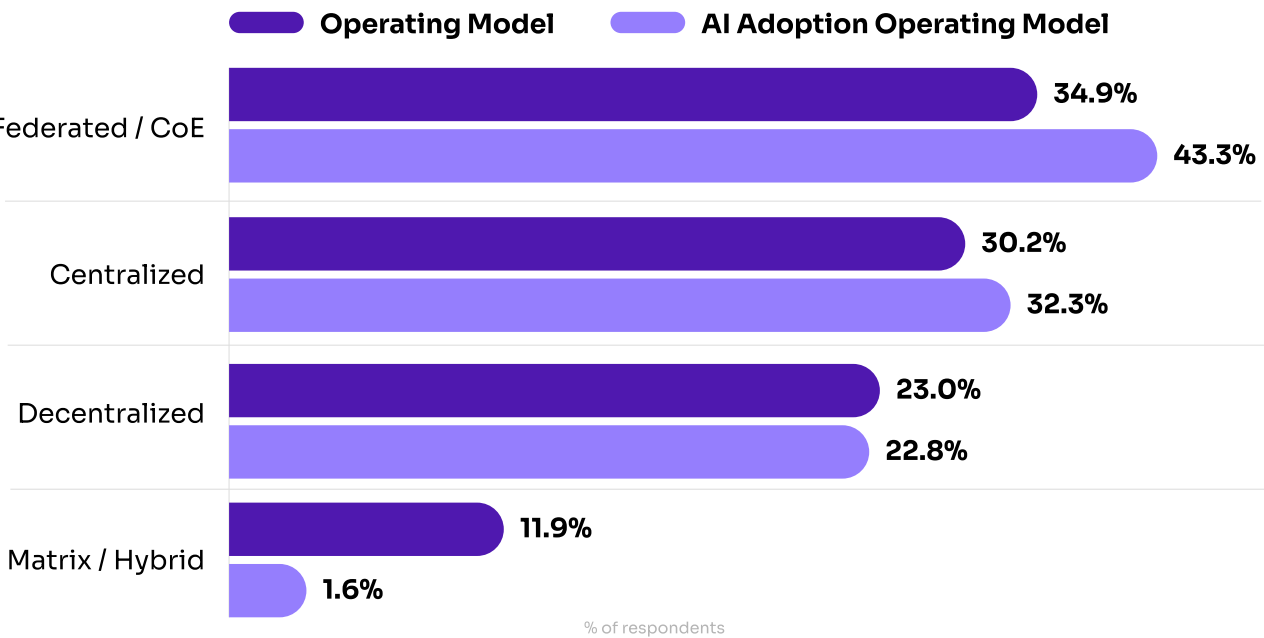
The rise of AI is adding new pressure to Martech operating models.

The distinction matters because AI creates a different management challenge. AI adoption requires central governance to manage risk, privacy, security, brand safety, legal exposure, and responsible AI practices. But it also requires distributed experimentation and practical adoption from the teams closest to customer journeys, content workflows, campaign execution, analytics, and service experiences.

This makes AI uniquely difficult to manage through either a purely Centralized or purely Decentralized model.

Operating Model

Which of the following statements best describes the operating model for Martech in your organization?



Federated / CoE

A central team sets standards and governance, but execution happens within decentralized teams and/or regions.

Centralized

A single team manages all Martech strategy, tools, and execution across regions and/or departments.

Decentralized

Individual business units or regions own and manage their own Martech stacks.

Matrix / Hybrid

A formal dual-reporting structure where Martech staff report to both a functional lead and a business lead.

SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 21: Operating model used to manage AI adoption compared with broader Martech management.

In general Martech operations, the Federated / Center of Excellence model is already the leading choice at **34.9%**. For AI adoption, however, Federated models rise to **43.3%**.

This **8.4** percentage-point difference suggests AI governance requires a more federated model than broader Martech operations.

Enterprise leaders recognize that AI cannot be locked entirely inside a central IT, data science, or innovation function. If it is, adoption will move too slowly and fail to meet practical marketing use cases. But they also recognize that AI cannot be left to unchecked local experimentation, where teams may introduce customer-facing, data-sensitive, or brand-risking capabilities without sufficient oversight.

AI is therefore creating a **Federation Mandate**: centralize governance, policy, infrastructure, and risk management; distribute experimentation, workflow adoption, and use-case development.

This is likely to become one of the defining operating model challenges of the next several years. As AI moves from experimentation into production, the organizations that succeed will be those able to combine central discipline with distributed execution.



Enterprise AI COEs are the factory, handling security, compliance, reliability, and scale. I don't need a second factory. I need a lab that moves fast on experimentation. The real skill is getting those experiments to consistently graduate to the factory floor.

Chris Vitti, Sr. Director, Head of Marketing Technology at The Cigna Group



The right balance comes from establishing a proper governance framework and setting clear, achievable goals for the local teams. Most teams are excited to learn AI and to acquire AI skills and will actively seek opportunities to experiment. At an enterprise level, the challenges stem from the direct application of learned AI to the intricate, specialized types of outcomes teams are expected to deliver, which is why establishing clear goals tied to expected outcomes helps create focus and prevents experimentation sprawl.

Agness Gaadi, Former Global Head of Marketing Operations at Ford

Research Insight

Operating model choice is less important than operating model clarity. Federation supports scale and AI adoption, but it only works when it borrows centralization's strengths: clear decision rights, standards, governance, and accountability.

Managing Martech

If the operating model determines how Martech teams are structured, technology lifecycle management determines whether governance becomes measurable value.

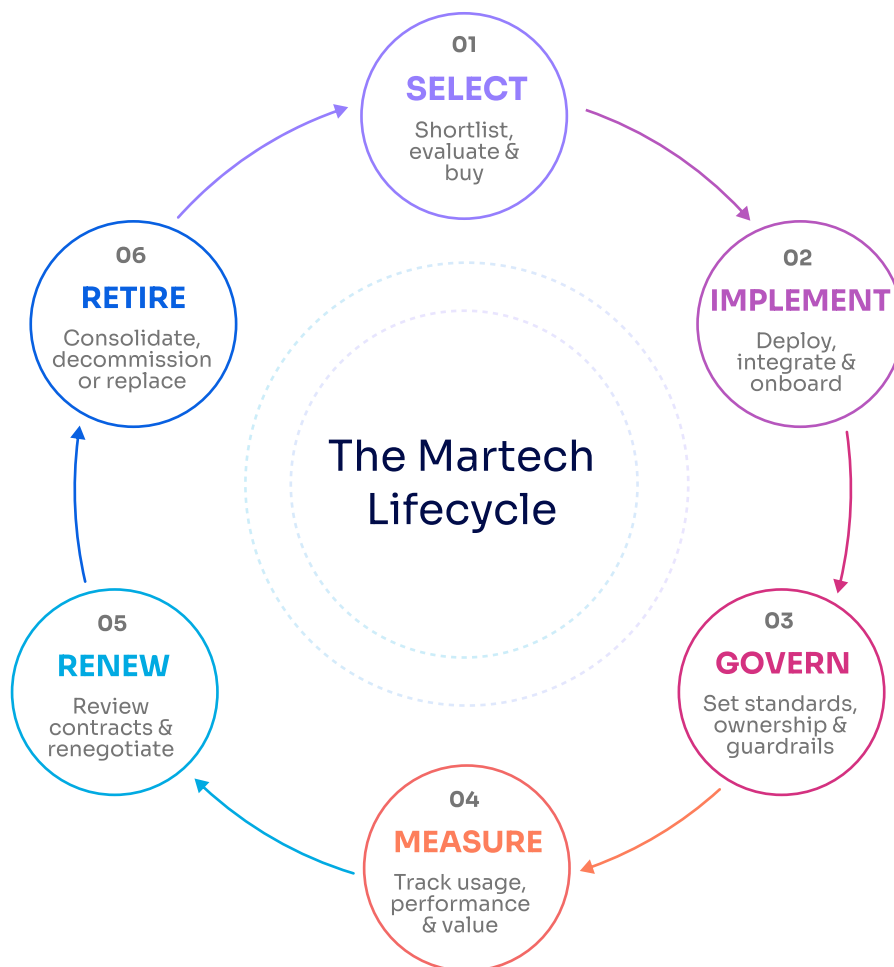
Enterprise Martech is more than a one-time purchasing decision. It is a continuous evidence system spanning strategy, procurement, architecture, implementation, governance, measurement, renewal, consolidation and retirement.

Enterprise Martech stacks have become increasingly complex. Platforms overlap. Categories converge. AI features are being embedded across existing tools. Data infrastructure is becoming more central to execution. Procurement involves more stakeholders. And every renewal cycle now carries greater financial scrutiny.

In this environment, the key skill Martech leaders need to have is Martech lifecycle management discipline.

The Martech Lifecycle

A continuous cycle to build, operate, and optimize a high-performing Martech stack



SOURCE: The Martech Weekly, Enterprise Martech Outlook 2026

Figure 22: The Martech Lifecycle – a continuous cycle for selecting, implementing, governing, measuring, renewing, and rationalizing enterprise Martech platforms.

Pragmatism over Architectural Dogma

Since 2020, one of the most important architectural debates in Martech has centered on composability.

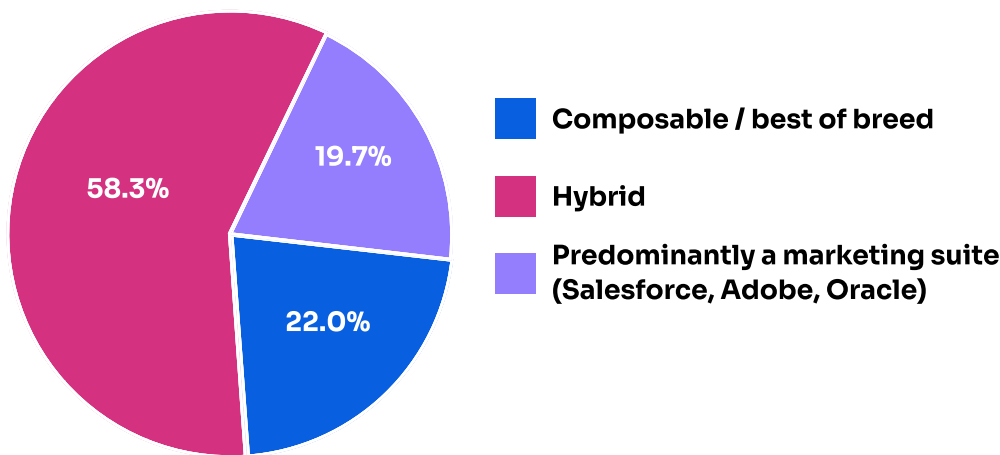
At one end of the debate sits the traditional marketing suite: integrated, consolidated, and easier to govern, but potentially less flexible. At the other sits the fully composable or best-of-breed stack: modular, decoupled, and highly

flexible, but often more operationally demanding to manage at enterprise scale.

For this research, we asked respondents to identify their organization’s primary approach to Martech architecture. Our research shows that enterprise leaders have largely rejected both extremes.

Composability Approach

Which statement best describes your current Martech architecture?



Definitions

Composable / best of breed	The organization primarily builds its Martech stack using specialized platforms selected for specific capabilities, with a greater emphasis on interoperability, modularity, and flexibility
Hybrid	The organization combines one or more major suite platforms with selected specialist or composable tools where they add strategic value.
Predominantly a marketing suite	The organization primarily relies on a major marketing suite ecosystem, such as Salesforce, Adobe, or Oracle, as the foundation of its Martech stack.

SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 23: Primary composability approach used by enterprise Martech leaders.

The dominant approach among enterprise consumer brands is Hybrid Composability. Rather than committing fully to a single marketing cloud ecosystem or attempting to

build an entirely decoupled best-of-breed architecture, most organizations are choosing a pragmatic middle path.

This is an important signal of market maturity.

Enterprise leaders are not treating composability as a philosophical position. They are treating it as an operating decision. For most, the objective is business utility instead of architectural purity.

Hybrid Composability allows organizations to anchor their stack around core platforms while selectively introducing more modular technologies where they create meaningful advantage. This approach gives teams the stability of established systems while preserving the flexibility to support specialized use cases, differentiated customer experiences, and evolving data architecture requirements.

The data points to Enterprise Martech leaders prioritizing pragmatism over ideology.



As for suite vs. best-of-breed vs. hybrid — I think all enterprises are hybrid! Seriously, I know of no enterprise that is running Martech entirely on a single suite, and I know of no enterprise that doesn't have at least one major suite vendor in their stack. I think it's mostly a question of degree: how much is under the control of one vendor?

Scott Brinker, Founder & Analyst at chiefmartec



I've yet to see a single platform solve every business need. In my experience, the most successful marketing organizations don't pick sides in the suite versus best-of-breed debate, they build around outcomes. We rely on enterprise platforms for scale and governance, then add specialist tools where they create a meaningful advantage. The real differentiator isn't the stack itself; it's how well the ecosystem adapts as business needs and technology evolve.

Nikhil Pandey, Associate Director Digital at Unilever

Composable Stacks Need a Data Center of Gravity

A deeper pattern in the survey is that composable / best-of-breed approaches are strongly associated with Cloud Data Platform centrality. **82.1%** of organizations using a composable / best-of-breed approach report a fairly or very central Cloud Data Platform architecture, compared with **56.8%** of Hybrid

organizations and **40.0%** of suite-led organizations. The association between best-of-breed architecture and data-platform centrality is statistically meaningful (chi-square **p=0.009**).

This suggests composability is more of a maturity pattern than a starting point. Modular stacks are easier to justify when the enterprise has a governed data foundation capable of holding the system together.

Platform Overlap Requires Governance

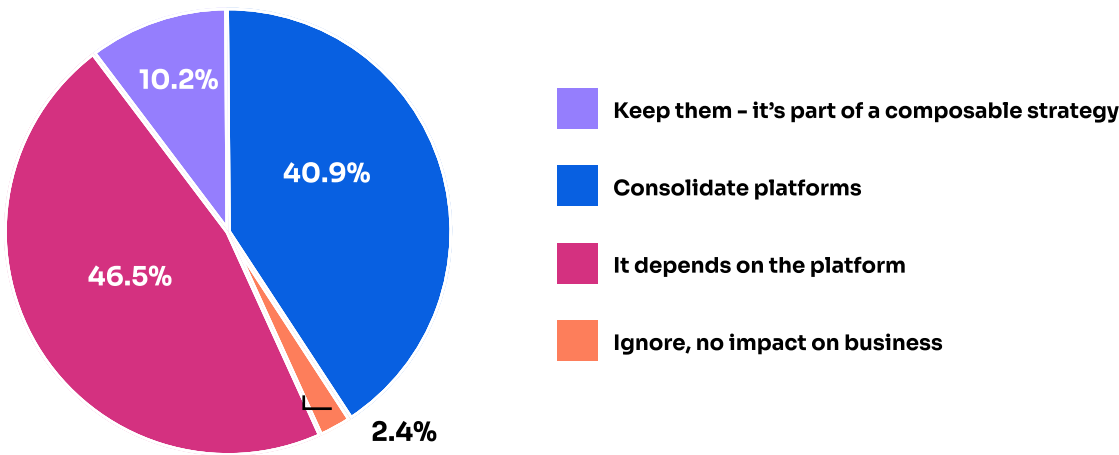
The rise of Hybrid Composability creates an unavoidable challenge: **platform overlap**.

In theory, every platform in the Martech stack should have a clearly differentiated role. In practice, enterprise environments are messier. Large organizations often operate across multiple brands, regions, markets, channels, and customer segments. Different teams inherit different tools, adopt new capabilities at different speeds, and face different business requirements.

As a result, some degree of feature overlap is almost inevitable.

Platform Overlap Approach

Which statement best describes your approach toward situations where you have platforms with overlapping capabilities?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 24: Enterprise approach to managing platforms with overlapping capabilities.

Our research shows that most Martech leaders are taking a pragmatic approach to overlap. The largest group of respondents evaluate consolidation on a case-by-case basis, while a substantial minority operate under a clearer consolidation mandate.

In many respects, the market treats consolidation as an obvious good. For CFOs and procurement teams, overlapping platforms can look like waste. For Martech leaders, the reality is more nuanced.

Two platforms may appear duplicative at the feature level while serving different brands, geographies, channels, data environments, compliance requirements, or operational teams. In large enterprises, the goal is rarely zero overlap. The goal is governed overlap.

The alignment between composability approach and consolidation strategy reinforces this point. Most organizations are choosing Hybrid stacks, and most are also choosing to tolerate or contextually evaluate feature overlap rather than blindly forcing consolidation.

This should be interpreted as a sign of operational maturity, not indecision.

The most sophisticated organizations understand that eliminating every instance of overlap can create as many problems as it solves. Poorly executed consolidation can reduce flexibility, slow teams down, create migration risk, and force business units into systems that do not fit their requirements. The real discipline is knowing which overlap creates redundancy, which creates resilience, and which creates strategic flexibility.

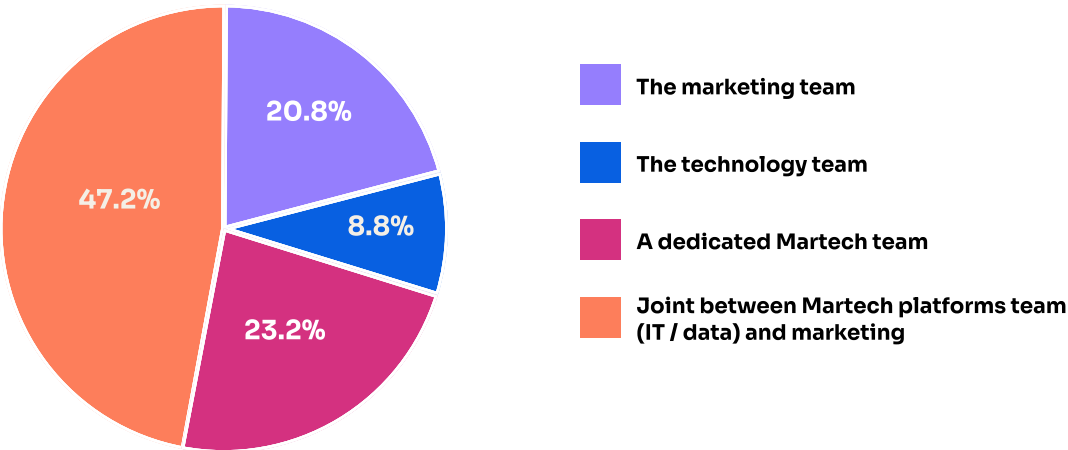
Martech Buying is a Cross-Functional Discipline

Technology lifecycle discipline is also visible in how enterprise organizations make Martech **purchasing decisions**.

Because Martech is technical, data-dependent, and financially scrutinized, purchasing authority often exists beyond traditional marketing ownership.

Decision Maker in the Organization

Which team is the primary decision maker when buying new Martech platforms?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 25: Primary decision maker for enterprise Martech purchasing decisions.

In most enterprise organizations, the primary decision maker for Martech purchases is now either a coalition of Marketing and IT or a dedicated Martech team. This reflects the reality that enterprise Martech buying can no longer be treated as a standard marketing procurement exercise.

Modern Martech decisions involve user experience, campaign execution, data architecture, identity resolution, privacy, integrations, procurement, security, and long-term commercial value. No single function can evaluate all of those dimensions effectively in isolation.

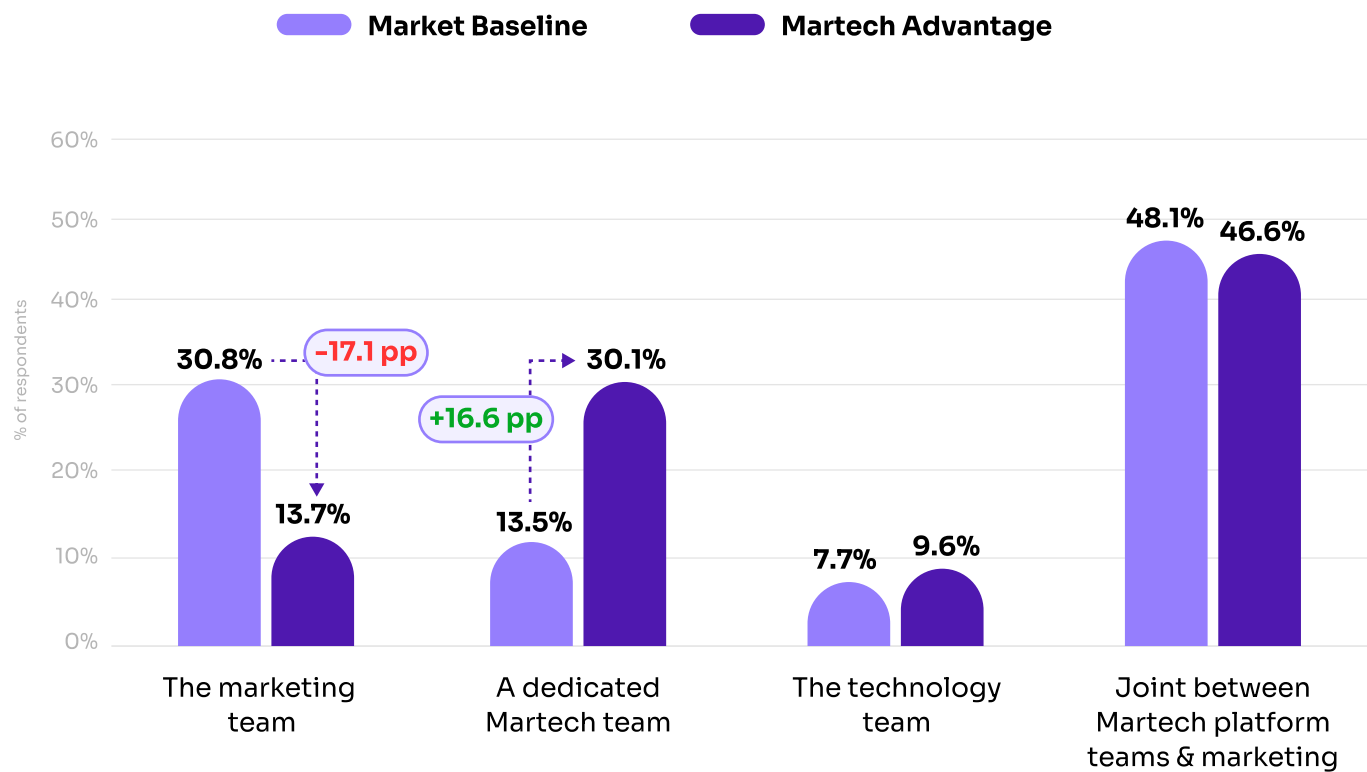
This clearly signals that Martech is institutionalized inside the enterprise. Buying decisions are increasingly made through cross-functional governance rather than concentrated within a single function.

This is because the cost of poor Martech purchasing is high. A tool that looks strong in a campaign demo may fail under enterprise data conditions. A platform with an attractive user interface may create integration debt. A vendor that solves a narrow workflow problem may introduce governance, security, or compliance risk elsewhere in the stack.

The strongest organizations are building buying processes that reflect this complexity.

Decision Maker in the Organization

Which team is the primary decision maker when it comes to buying new Martech platforms?
(Comparison of Martech Advantage vs Market Baseline)



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 26: Primary Martech purchasing decision maker: Martech Advantage vs Market Baseline.

Among Market Baseline organizations, Marketing teams are far more likely to be the primary decision maker for Martech purchasing. Among Martech Advantage organizations, this pattern reverses. Dedicated Martech teams are significantly more likely to hold decision-making authority, while solo Marketing ownership becomes less common.

This suggests that high-performing organizations do not leave Martech purchasing to standard marketing structures alone. **They institutionalize it.**

That distinction is important. A traditional marketing team may be well equipped to assess campaign workflows, front-end usability, and immediate channel requirements. But enterprise Martech decisions increasingly depend on deeper architectural and operational considerations: data models, identity stitching, API performance, governance requirements, integration patterns, security posture, and long-term interoperability.

Martech Advantage organizations appear more likely to recognize this complexity and assign Martech decision-making to teams designed to evaluate it.

This does not diminish Marketing’s role. Rather, it elevates Martech into a more formalized discipline that connects Marketing’s commercial needs with IT’s governance requirements and the organization’s broader customer experience strategy.

Trust Has Become a Procurement Filter

As Martech buying becomes more complex, enterprise leaders are also changing where they look for validation.

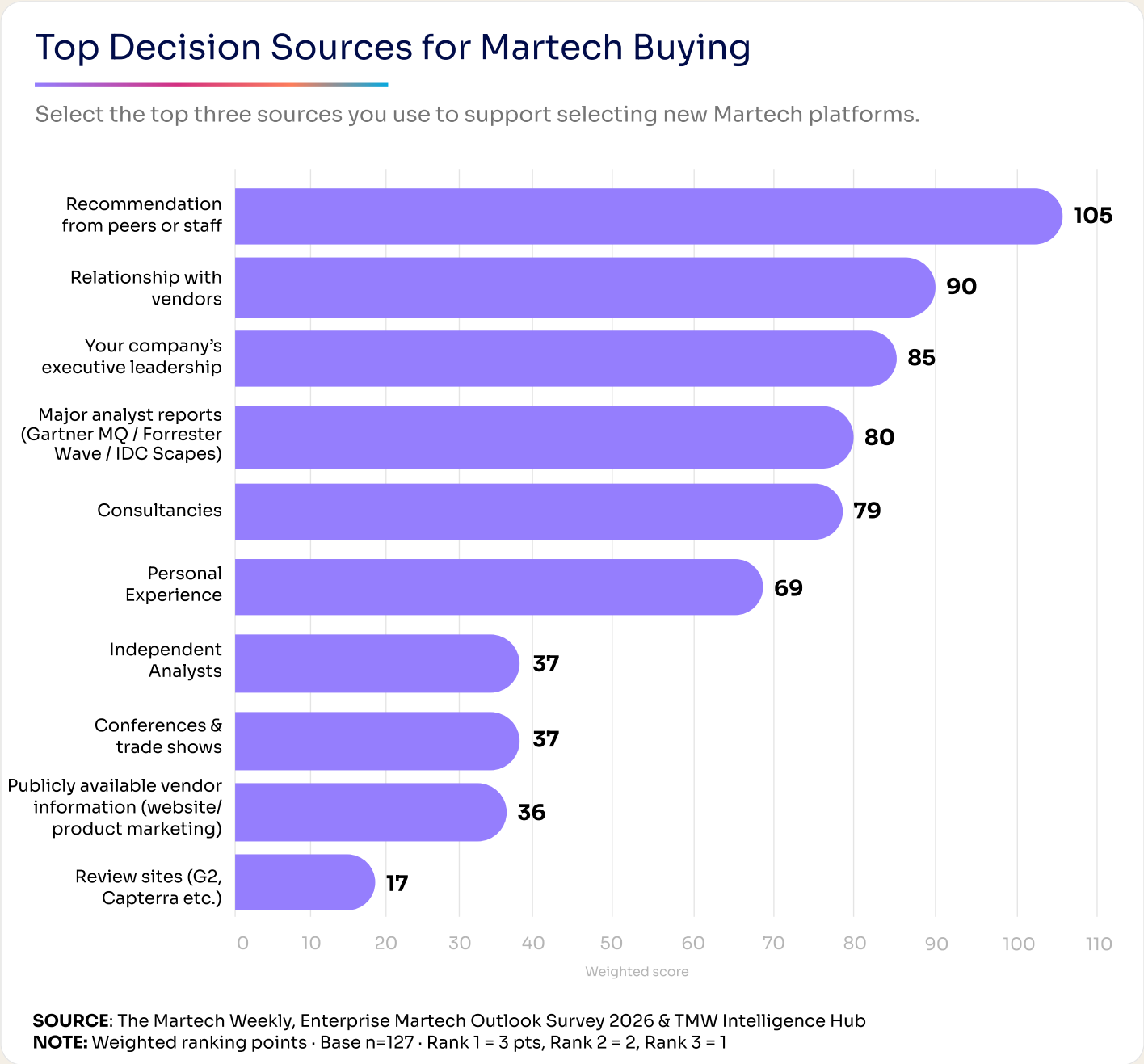


Figure 27: Sources enterprise Martech leaders rely on when evaluating Martech platforms.

Peer recommendations emerge as the most influential source of validation, outranking analyst firms, consultancies, software review sites, and other traditional inputs.

Enterprise Martech is highly contextual. Public reviews and generalized market rankings rarely capture the details that matter most to large consumer organizations: implementation complexity, integration reliability, data model fit, enterprise support quality, organizational change requirements, and the gap between vendor promise and production reality.

For those questions, leaders turn to peers who have already lived through the implementation. This does not mean analyst firms and consultancies are irrelevant. They continue to play an important role in framing markets, validating categories, and supporting strategic direction. But for enterprise buyers, the most trusted intelligence often comes from practitioners who can explain what actually happens after the contract is signed.



Trust in Martech is being rebuilt from the outside in. Buyers are relying less on institutional promises and more on proof: peer networks, practitioner communities, independent data and observable outcomes. That cultural shift is happening alongside a generational one. The next era of Martech buying will be less about who has the biggest brand, and more about who has earned the market's confidence.

Juan Mendoza, Founder & CEO at The Martech Weekly

Renewal Management as a Competitive Safeguard

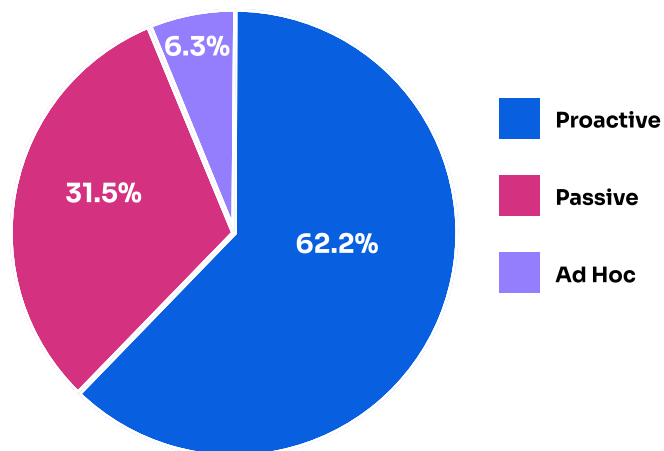
Lifecycle discipline does not end once a platform is purchased.

In many organizations, the most important Martech decisions happen at renewal. This is the moment when teams are forced to evaluate whether a platform still delivers value, whether usage justifies cost, whether capabilities overlap with other tools, and whether the vendor remains strategically relevant.

Most enterprise organizations manage renewals proactively rather than passively.

Contract Renewal Process

Which statement best describes your organization's approach to Martech contract renewals?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 28: Approach to managing Martech contract renewals.

62.2%

of enterprise organizations now manage Martech contract renewals proactively. Rather than waiting for renewal deadlines or allowing contracts to roll over by default, these organizations are actively reviewing performance, negotiating terms, and evaluating strategic fit ahead of time.

This is a major signal of operational maturity.

A proactive renewal process turns Martech management from a reactive administrative task into a disciplined value review. In the survey, proactive renewal management was strongly associated with clear value demonstration (70.9% vs 41.7%; chi-square $p=0.002$), making it one of the clearest operational signals of Martech maturity.

70.9% vs 41.7% $p=0.002$

The low share of ad-hoc renewal management is also telling. Enterprise Martech leaders are increasingly aware that unmanaged renewals create silent waste. In large stacks, the combination of automatic renewals, unclear ownership, low utilization, and overlapping capabilities can quietly drain significant value from the technology budget.

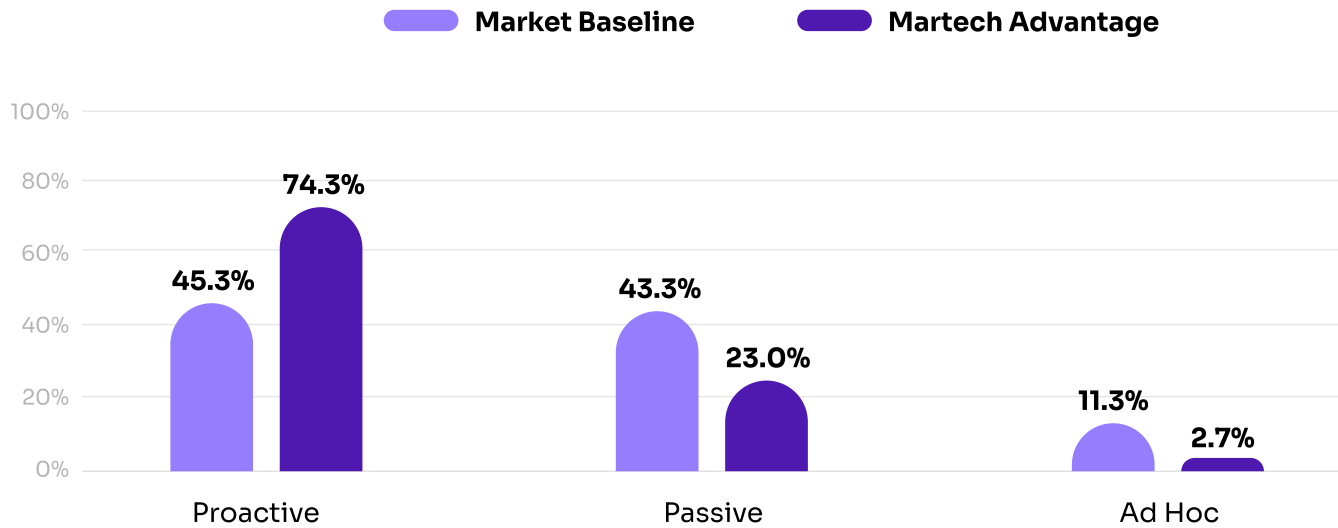
Proactive renewal management is therefore not simply a procurement best practice. It is a financial control and a value-proof mechanism.

Lifecycle Discipline is a Martech Advantage

The difference between Martech Advantage and Market Baseline organizations is especially pronounced in **renewal discipline**.

Contract Renewal Process

Which statement best describes your organization’s current approach to Martech contract renewals? (Comparison of Martech Advantage vs Market Baseline)



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

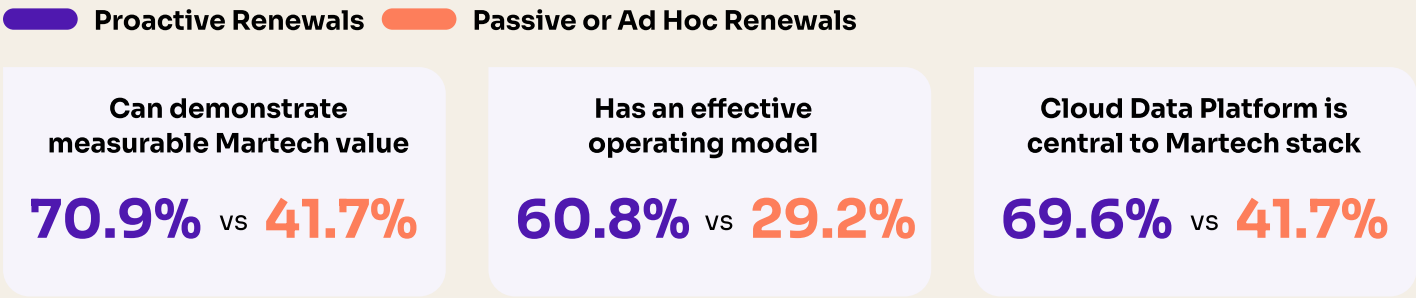
Figure 29: Approach to Martech contract renewal management: Martech Advantage vs Market Baseline.

Proactive	All renewals are tracked in a centralized system with time-based alerts for review and renegotiation.
Passive	We primarily rely on spreadsheets, employees' memory, and vendor notifications. We sometimes run out of time to properly review and renegotiate large contracts; smaller contracts often auto-renew without review
Ad Hoc	We lack a formal tracking process, often leading to surprise renewals and missed opportunities to review and renegotiate contracts.

Nearly three-quarters of Martech Advantage organizations manage renewals proactively, compared with fewer than half of Market Baseline organizations.



Proactive renewal management is associated with other maturity signals



This does not prove that active renewals cause those outcomes. It does suggest that renewal discipline travels with broader Martech maturity: clearer ownership, better value proof, stronger data foundations and more effective operating models.

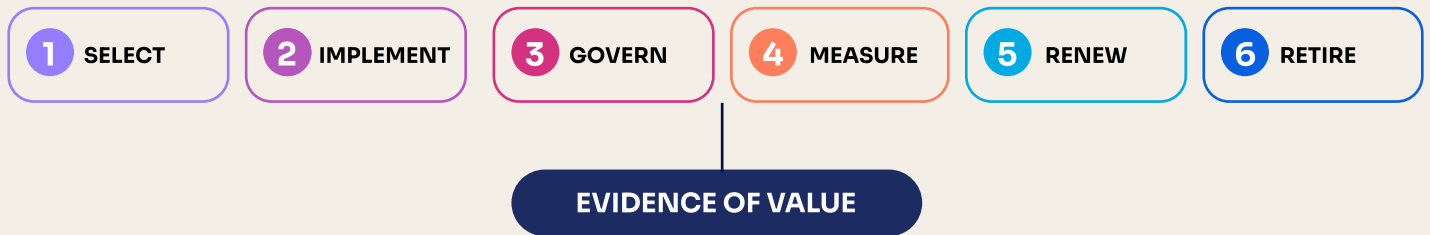
Active renewal management gives organizations a structured moment to ask whether each platform is still contributing to the outcomes it was purchased to support

RENEWAL DISCIPLINE IS MORE OF A VALUE-PROOF MECHANISM THAN SIMPLY A COST-CONTROL MECHANISM.
It functions as a continuous rationalisation of the stack.

Research Insight

Enterprise Martech maturity is a technology lifecycle discipline.

The strongest signal is not tool count or architectural philosophy, but whether organizations actively select, govern, measure, renew and rationalize platforms in ways that produce evidence of value.



Inside the Enterprise: Key Implications

The findings across this section point to a clear conclusion: enterprise Martech maturity is defined less by technology sophistication than by the organization's ability to turn investment into proof, governance and repeatable execution.

01

Value Proof is a Funding Advantage

Enterprise Martech is increasingly judged as a capital allocation decision. Leaders need aligned commercial objectives, outcome-driven KPIs, and credible evidence that Martech contributes to financial or accepted financial-proxy outcomes. Teams with stronger value proof were more likely to report budget growth, which makes measurement capability a practical funding advantage rather than a reporting exercise.

02

Operating Clarity is the Real Maturity Signal

There is no single operating model that works in every context. Federation supports scale, centralization supports accountability, and dedicated Martech ownership helps institutionalize decision-making. The common requirement is clarity: explicitly predetermined decision rights across ownership, data governance, tool approval, and outcomes.

03

Martech Lifecycle Discipline Turns Governance Into Value Proof

The clearest maturity signal in the management data is active Martech lifecycle governance. Proactive renewal management is strongly associated with value demonstration, operating-model effectiveness, and data-platform centrality. This reframes renewals, overlap management, procurement and rationalization as part of the same discipline: continuously proving that the stack is still worth the investment.

External Forces

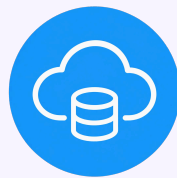
Inside the Enterprise examined the disciplines that determine whether Martech creates value: proof, governance, operating model, lifecycle management and measurement.

Those disciplines matter because External Forces are intensifying. AI, data platform-centricity, and decisioning are more than technology trends; they are readiness tests.

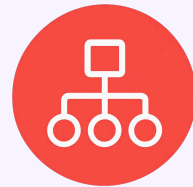
Most enterprise organizations can access similar platforms. The difference is whether they can make those platforms measurable, governed, and useful.



AI tests content operations, governance, and workflow maturity



The Cloud Data Platform tests whether customer data can move from storage into activation



Decisioning tests whether the organization can turn customer context into coordinated interactions.

This section focuses on those three forces: AI, data platform-centricity and decisioning. Across each area, the practical question is the same: what is the enterprise ready to operationalize?

The Impact of AI

AI is the most visible external force reshaping enterprise Martech in 2026.

It is influencing vendor roadmaps, budget allocation, operating models, content

workflows, decisioning capabilities, analytics, and customer engagement strategies. It is also creating a familiar enterprise problem: the technology is moving faster than the organization's ability to absorb it.

This is the **AI Readiness Gap**: the distance between what AI tools can technically enable and what enterprise organizations can safely, measurably, and operationally deploy.

The dedicated AI budgets identified earlier in this report show that AI is no longer being treated as a fringe innovation agenda.

Two-thirds of surveyed organizations now have a dedicated budget allocated to AI initiatives. The question is no longer whether enterprises are investing in AI. It is whether they are ready to convert that investment into production-scale value.

The answer is uneven.

Some organizations are already moving AI into production across content creation, journey optimization, reporting, decisioning, and workflow automation. Others remain caught between experimentation and scale, limited by data readiness, governance requirements, risk appetite, measurement challenges, and legacy operating models.

AI is no longer emerging. But for most enterprise Martech teams, it is not yet mature.

AI Impacts Marketers Before Customers

The first major finding is that AI is currently having a greater impact on the Martech function than on customer experience delivery.

For this analysis, we distinguish between two types of AI impact:



Marketer Experience:

The internal workflows, tools, processes, and productivity gains experienced by marketing teams.

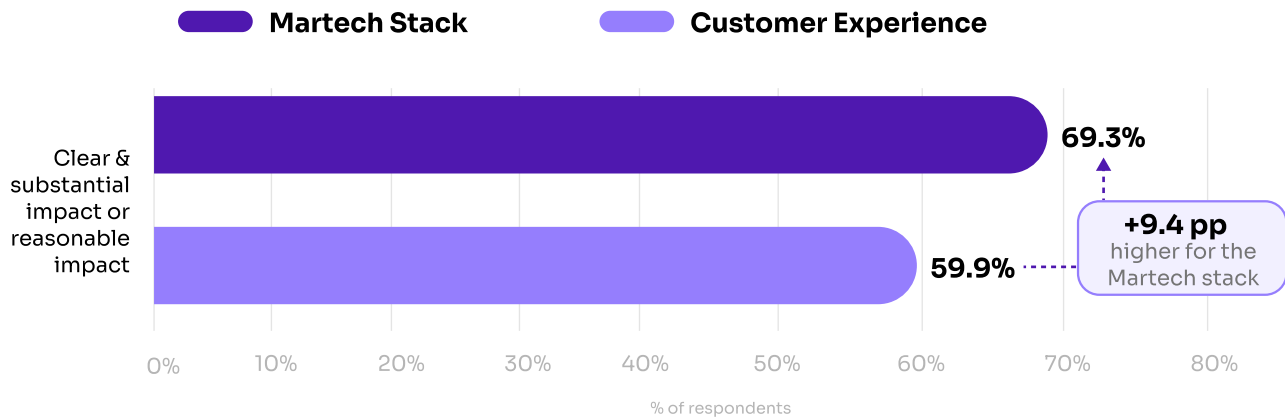


Customer Impact:

The external impact of how brands interact with customers.

AI Impact on Martech Stack vs CX

How do respondents perceive the impact of AI on the Martech stack versus customer experience delivery?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 30: Perceived impact of AI on the Martech stack compared with customer experience delivery.

Across the surveyed organizations, **69.3%** of Martech leaders report that AI is having a reasonable, clear, or substantial impact on the Martech stack. By comparison, **59.9%** report the same level of impact on customer experience delivery.

This creates a **9.4-percentage-point** gap between AI's impact on the marketer's operating environment and its impact on the customer's experience.

For all the discussion about AI transforming customer engagement, the current impact is weighted more toward inside the enterprise. AI is helping marketers write, edit, analyze, report, generate creative variations, automate workflows, and improve internal productivity. These are meaningful gains, but they are not the same as delivering more intelligent, adaptive, and valuable customer experiences.

In other words, AI is having a greater perceived impact on marketer experience than on customer experience.

This is a natural phase of adoption. Internal use cases are easier to govern and test, and less risky to deploy than customer-facing applications. They often sit closer to existing workflows and further away from sensitive customer data, regulatory exposure, or brand risk.

But it also reveals the next challenge. If AI is to deliver on its strategic promise, enterprise organizations will need to move beyond internal productivity and connect AI capabilities to customer-facing outcomes that can be measured, governed, and scaled.



AI is currently making marketers more efficient, but not necessarily more innovative. Many teams are being asked to do more with less, so AI is used to keep the existing machine running faster. That is understandable, but also limiting. The real breakthrough comes when efficiency creates room to redesign the customer experience, not just produce more of the same communication at higher speed.

Rasmus Houliind, Founder of The Omnichannel Institute



We stood up a governance committee to vet AI initiatives — necessary, but it adds friction. The bigger blocker was our own infrastructure: mid-implementation, we hit limitations because our systems hadn't kept pace with the technology, forcing band-aids and eventually a full pause until we caught up. Trust and governance slow things down, but organizational readiness is the real bottleneck right now.

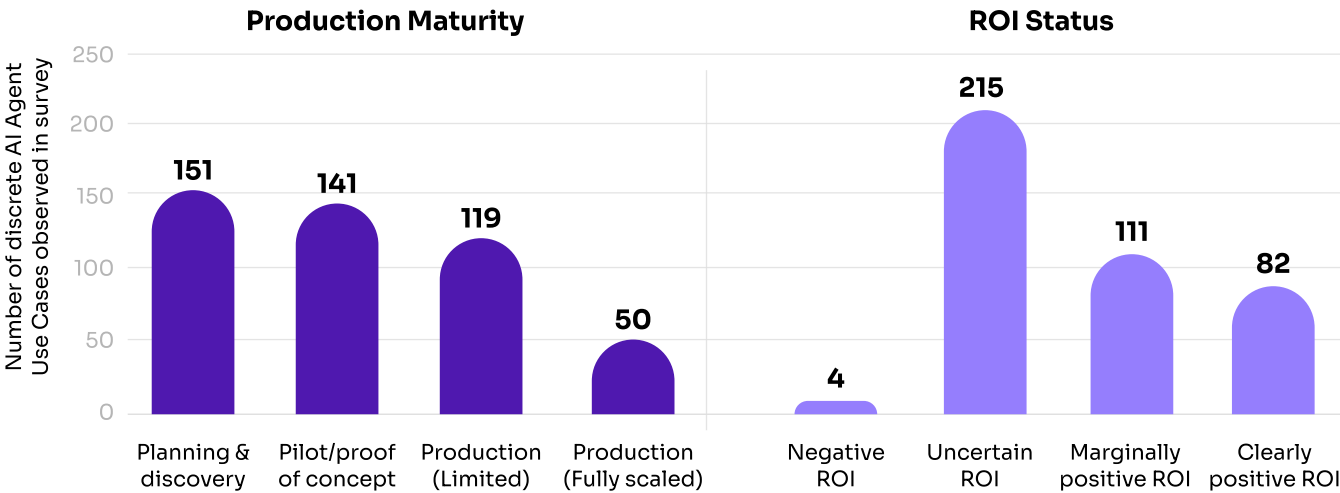
Senior Director Digital Consumer Engagement | Healthcare | <\$10B Annual Revenue

AI Agents Split Between Productivity Plays and Hard Problems

AI agents have become one of the most discussed topics in Martech, but enterprise adoption remains early.

AI Agent Use Cases by Production Maturity and ROI Status

Number of discrete AI Agent use cases observed in survey by their current stage of production maturity and ROI status within organizations



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub
NOTE: ROI status not available for all use cases.

Figure 31: Current maturity of AI agent initiatives within enterprise Martech teams.

EXTERNAL FORCES

Only **10.8%** of AI Agent initiatives are fully scaled in production; however, nearly all organizations (**95.3%**) have AI Agents on their roadmap.

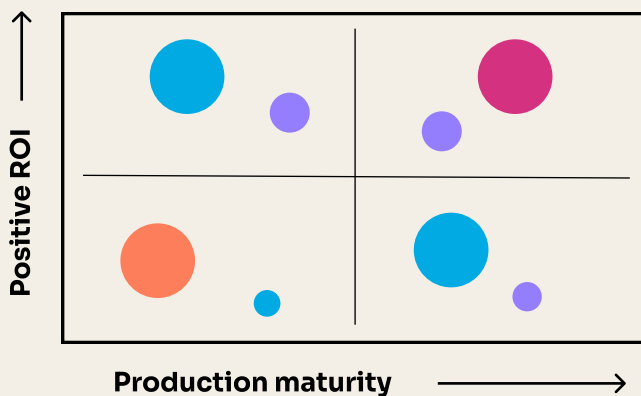
This is not surprising. Agentic AI is more operationally demanding than standalone Generative AI tools. It requires clearer workflows, stronger governance, better data access, stronger integration patterns, and more confidence in how autonomous or semi-autonomous systems make decisions.

The chart is not a conventional ranking. It shows two different things: how widely a use case has reached production and how consistently organizations report positive ROI. Those signals do not always move together, and each quadrant calls for a different response.

To analyze the market, we mapped AI agent use cases across two dimensions:

- **Production maturity:** The share of organizations that have moved the use case into production (limited or full rollout).

- **Positive ROI:** The share of organizations reporting positive ROI from the use case.

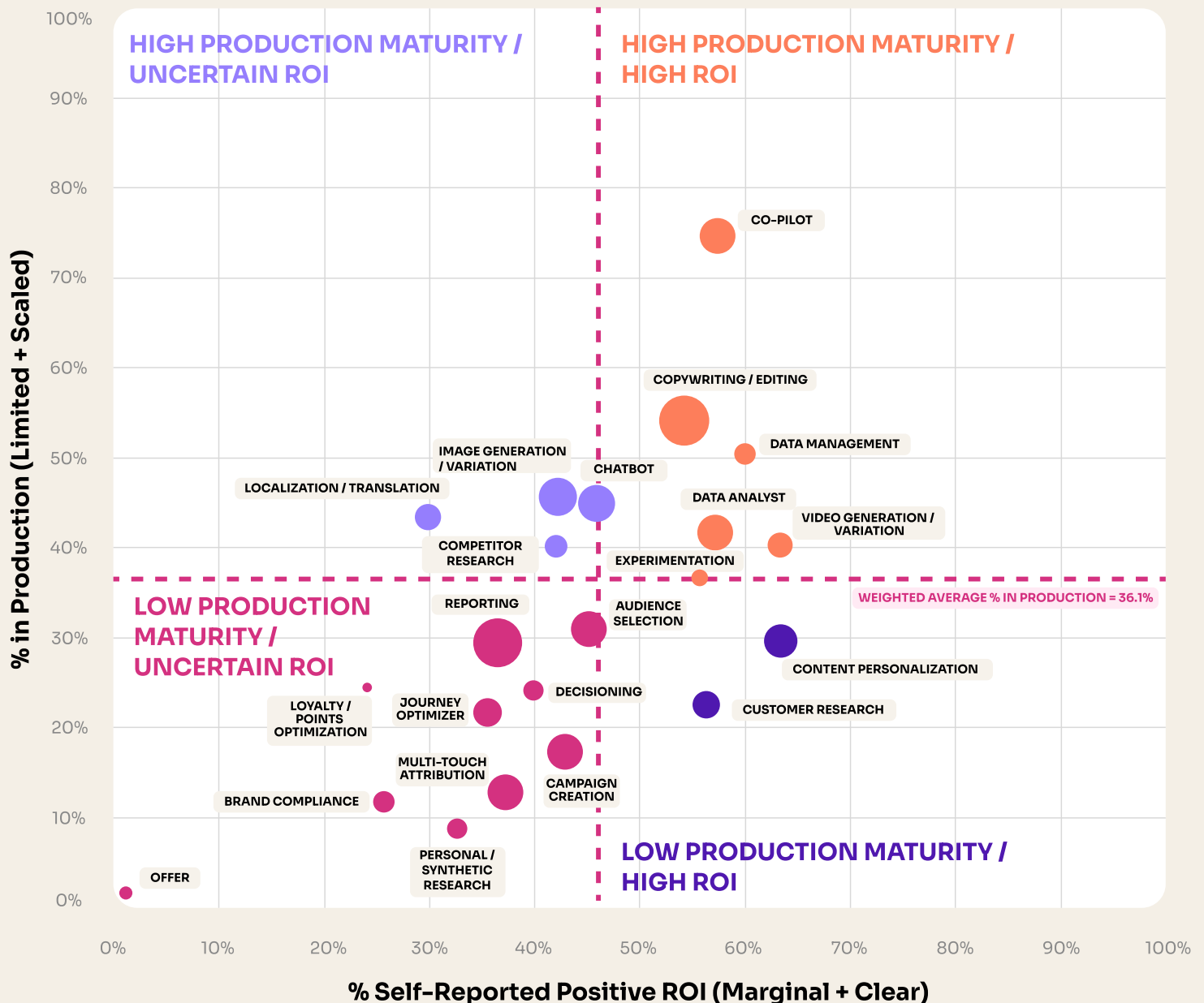


The vertical and horizontal reference lines represent the weighted market averages for production maturity and positive ROI. These lines divide the market into four quadrants.

Bubble size represents relative adoption of each use case.

ROI in this analysis is self-reported by survey respondents and should be read as a measure of **perceived value realization** rather than independently verified financial return.

WEIGHTED AVERAGE % POSITIVE ROI = 46.6%



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 32: AI agent use cases mapped by production maturity and positive ROI, with bubble size representing relative adoption.

Proven Productivity Plays: Higher Maturity, Higher ROI

The top-right quadrant combines above-average production maturity with above-average positive ROI. This is the strongest evidence of repeatable value.

Co-pilots lead the field, while copywriting and editing, data management, data analysis, and video generation or variation also sit here. Experimentation is close to the production-maturity threshold.

Most of these use cases augment work marketers already perform rather than handing an agent an end-to-end customer decision. They have identifiable users, bounded tasks, and outputs that people can review, which makes them easier to govern and gives teams a clearer way to observe time saved, throughput gained, or costs reduced.

This is the most credible place to scale now. The lesson is not that every implementation will work, but that these categories have cleared both bars more often than the rest of the market.

High-Value Hard Problems: Lower Maturity, Higher ROI

The bottom-right quadrant combines below-average production maturity with above-average positive ROI. Only content personalization and customer research sit clearly in this group.

That makes this a promising signal, not definitive proof of market-wide maturity. The organizations that have deployed these use cases report positive results more often than average, but adoption remains limited and the evidence base is less widespread than it is for the top-right quadrant.

These use cases are candidates for targeted expansion, rather than immediate enterprise-wide scale.

Leaders should identify what made successful implementations work, test whether those conditions can be repeated, and scale in stages while strengthening the data, governance, integration, and measurement needed for broader use.

Operationally Stuck Use Cases: Lower Maturity, Less Certain ROI

The bottom-left quadrant is the largest and most mixed. It includes journey optimization, decisioning, audience selection, campaign creation, multi-touch attribution, reporting, synthetic research, brand compliance, loyalty or points optimization, and offer agents.

These use cases sit below the weighted averages for both production maturity and positive ROI. The chart does not show that they can never create value. It shows that the market has not yet demonstrated that value consistently or at scale.

Some are strategically important and technically demanding. Fragmented data, disconnected channels, unclear ownership, governance constraints, and weak incrementality measurement may hold them back. But readiness should not become an all-purpose explanation: in some cases, the use case may be too broad, the economics may be weak, or the agent may not outperform a simpler process.

The right response is disciplined validation: define the decision or outcome precisely, narrow the scope, compare performance against a credible control, and scale only when incremental value is visible.

Embedded Utilities: Higher Maturity, Less Certain ROI

The top-left quadrant contains use cases with above-average production maturity but below-average positive ROI.

Localization and translation, image generation and variation, chatbots, and competitor research have reached production relatively widely, but the ROI evidence is less consistent.

These capabilities may be deployed because they are easy to access, bundled into existing platforms, or useful at the task level. Yet convenience is not the same as economic value. Quality control, rework, model and platform costs, weak adoption, or poor measurement can erode the apparent benefit.

This quadrant is a warning against using deployment as a proxy for success. Teams should tighten measurement around the specific outcome each use case is meant to improve and be prepared to redesign or retire implementations that are active but not creating enough value.

Production maturity and strategic value are not the same thing. Scale and optimize the top-right; prove or improve the economics of the top-left; expand the bottom-right selectively; and challenge assumptions through tighter experiments in the bottom-left.



Yes, there is a risk that enterprises use AI agents to accelerate old habits: more copy, more reports, more campaign variants. That may save time, but it doesn't transform customer experience. The strategic potential is to use agents to orchestrate across channels, adapt to moments of truth, and connect insights, content, timing, and business objectives in ways traditional campaign management cannot.

Rasmus Houliind, Founder of The Omnichannel Institute



Automation will become table stakes; every competitor will have it, so it delivers no lasting differentiation. The real strategic question is: what are you doing with the efficiency you're gaining? Are you automating legacy processes that should have been redesigned, or building AI-native ways of working? The companies that will win long-term won't be those who automated fastest; they'll be those who used AI to rethink how they serve consumers.

Linda Cereda, Former Global VP Marketing Data at Nike, AI Advisor

Governance Is Defining the Boundary of Customer-Facing AI

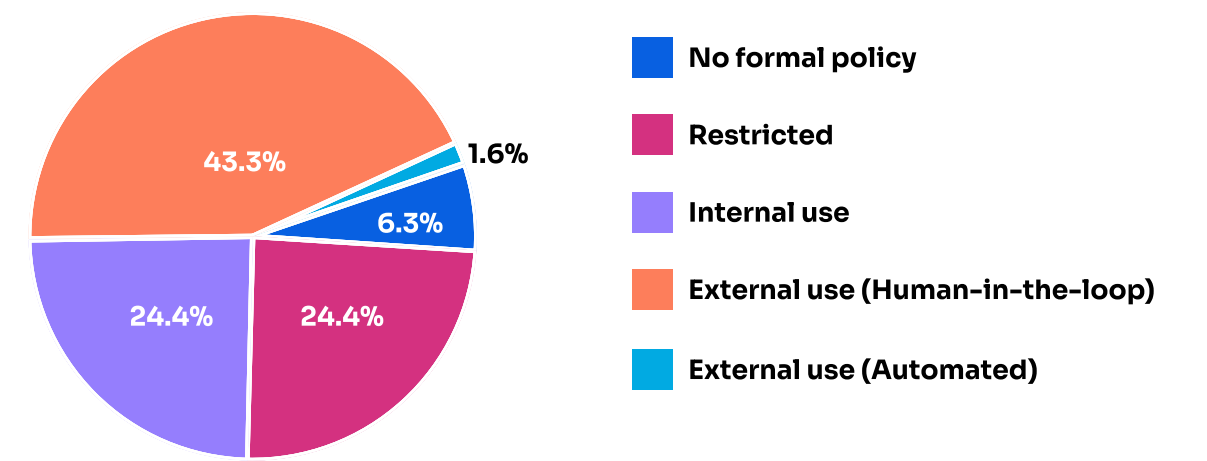
One of the biggest constraints on AI maturity is **over-governance**.

Enterprise brands are understandably cautious about placing AI-generated outputs in front of customers. Customer-facing AI introduces risk across brand safety, legal exposure, privacy, accuracy, fairness, accessibility, and regulatory compliance.

To understand this boundary, we asked organizations about their policy for using Generative AI in externally facing content.

GenAI Policy

Which statement best describes your organization's policy toward AI-generated content?



No formal policy	We currently have no official guidelines around GenAI use.
Restricted	The use of GenAI for company work is heavily restricted due to security, legal, or brand integrity concerns
Internal use	We allow use of GenAI for internal tasks but it is not permitted for customer-facing or final deliverables.
External use only (Human-in-the-loop)	We use GenAI for creating content but all final outputs must be reviewed, edited, and verified by a human before publication
External use only (Automated)	GenAI is used to create customer-facing content that is not reviewed by a human before publication

SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 33: Enterprise policy for using Generative AI in externally facing customer content.

EXTERNAL FORCES

The dominant approach is controlled adoption. **43.3%** of organizations allow AI-generated content for external use but require human-in-the-loop review before it reaches customers. Fully automated customer-facing use remains extremely rare, at only **1.6%** of the sample.

This shows that enterprise Martech leaders are not simply avoiding AI. They are building controlled pathways for it.



For us, the moment we trusted our content personalization agent to run without a human review was when we backtested it against six months of manual campaigns and saw a 15% lift in conversion with zero brand safety violations. That proof point changed everything. Still keep the human in the loop for high-stakes brand messaging, but for routine stuff the training wheels are off.

Rena Senoman, Senior Director, Customer Data Platforms at Stellantis North America

At the same time, a substantial share of organizations still restrict Generative AI from reaching customers entirely. Only 6.3% report having no formal policy in place, suggesting that governance is already a mainstream requirement for enterprise AI adoption.

The market is therefore settling into a clear position: customer-facing AI is acceptable, but only when bounded by human oversight, governance, and risk controls.

This reinforces a broader pattern and challenge for brands: whether the organization can safely operationalize AI-generated content within enterprise standards.



For me, the biggest milestone is when AI becomes something people trust because of consistent performance, not because they're told to trust it. We've seen good results, but we still catch errors that need human judgment. Once those reviews become the exception instead of part of every workflow, that's when I'd feel comfortable reducing the human-in-the-loop requirement.

Carlos Tevez, Editorial Director at Moody's



AI's value in marketing is showing up at the surface first, not the deep water. The clearest wins are in workflows marketers already understand: writing, editing, image generation, content variation and campaign production. These use cases work because they are close to the work, easy to review and simple to govern. The near-term advantage is not architectural reinvention. It is making the existing marketing machine move faster.

Juan Mendoza, Founder & CEO at The Martech Weekly

The Martech Advantage / Market Baseline split reinforces this point.

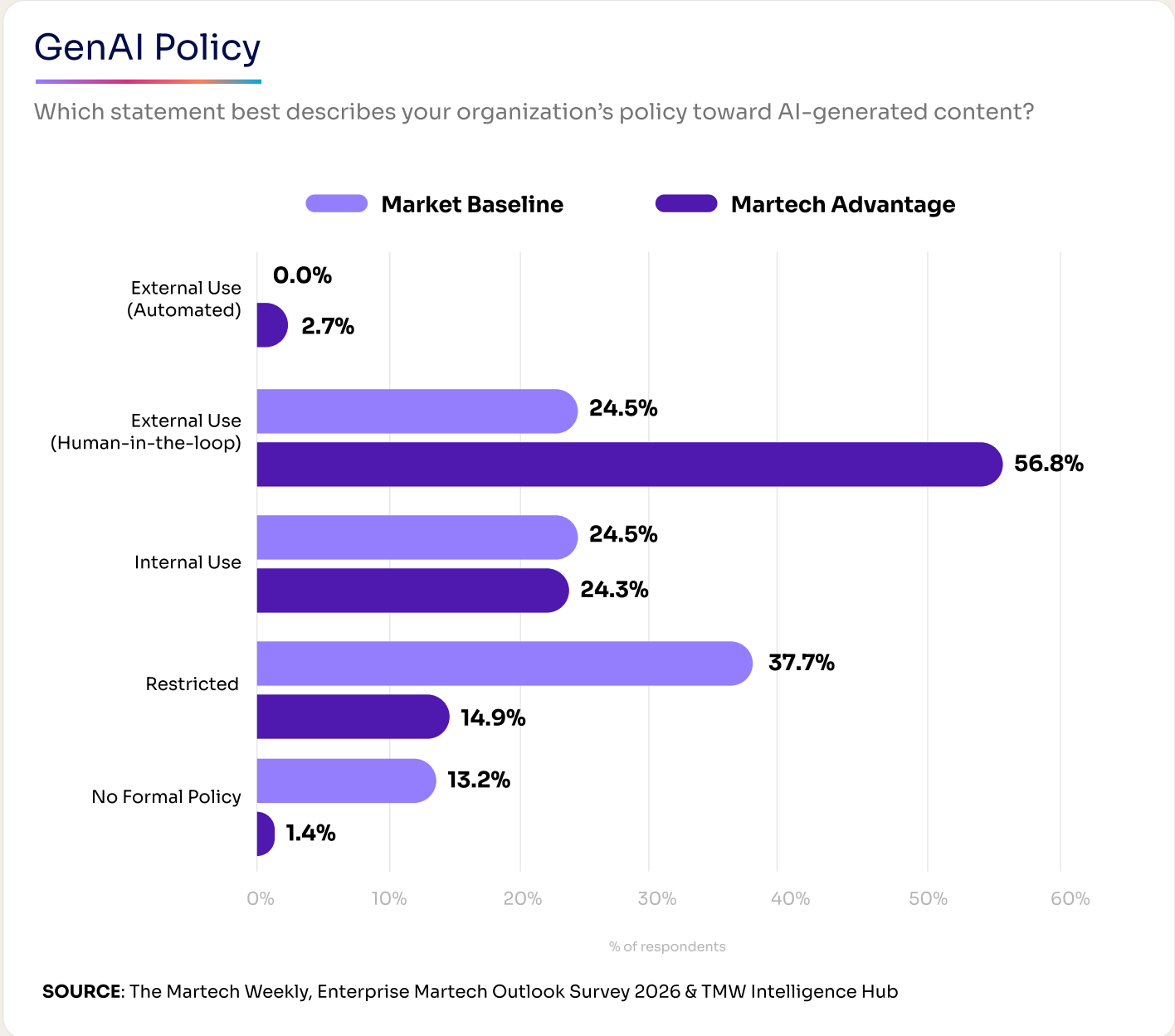


Figure 34: Enterprise policy for using Generative AI in externally facing customer content: Martech Advantage vs Market Baseline.

Martech Advantage organizations are not more likely to use AI externally because they have abandoned governance; they are more likely to use it because they have created controlled pathways for adoption. More than half of Martech Advantage organizations allow externally facing AI content with human-in-the-loop review, compared with only a quarter of Market Baseline organizations, while Market Baseline organizations are far more likely to either restrict AI entirely or have no formal policy in place.

This suggests that the next stage of AI maturity is not defined by risk appetite alone. It is defined by the ability to move from blanket restriction to governed enablement: giving teams permission to use AI where it can create value, while maintaining the controls required to protect the brand, the customer, and the organization.



We are witnessing a fundamental shift: AI has solved content creation at scale. The bottleneck to content operations is now content confidence.

As AI accelerates production, organizations need a scalable trust layer that verifies provenance, manages rights, enforces brand and regulatory compliance, and ensures only trusted assets reach the market. Tools like C2PA content credentials will help, but trust isn't a feature; it's an operating model. The future belongs to organizations that combine AI-powered governance with human accountability.

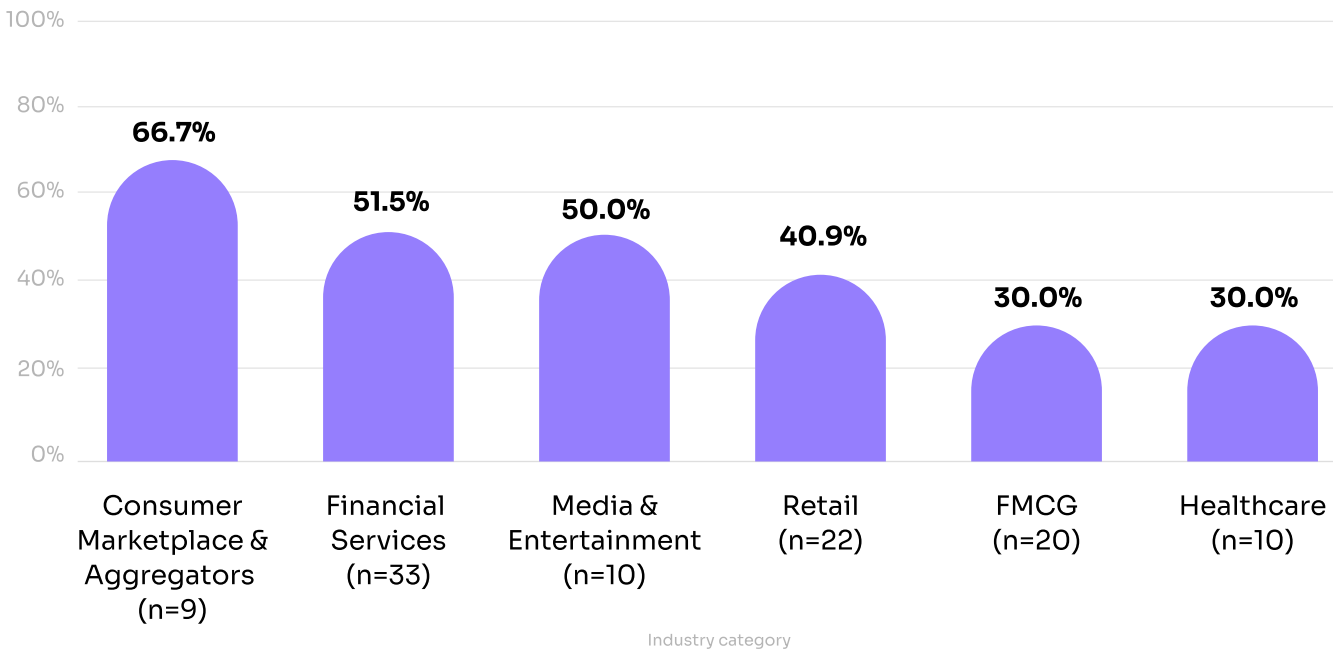
Kristina Huddart, Content Operations Consultant & Founder, Huddart Consulting Limited

Industry Context Shapes AI Risk Appetite

Risk appetite appears to vary significantly by industry.

% of Companies Allowing External GenAI Use by Industry

Industries with n ≥ 9 only



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 35: Share of organizations allowing Generative AI outputs to be used externally, by industry. Note: Industry-level analysis only includes sectors with sufficient sample size to support directional comparison.

EXTERNAL FORCES

Digital-first business models show the highest tolerance for external AI-generated content. Consumer Marketplaces and Aggregators lead the market, with **66.7%** of surveyed organizations allowing Generative AI outputs to reach customers.

By contrast, traditional and more heavily regulated sectors remain more cautious. Only **30.0%** of organizations in FMCG and Healthcare currently permit Generative AI for customer-facing applications, reflecting stronger concerns around brand safety, regulatory exposure, and customer trust.

Financial Services presents a more nuanced picture. Despite operating under significant regulatory pressure, **51.5%** of surveyed financial institutions allow externally facing Generative AI content. This suggests that some highly regulated organizations are not responding with blanket bans. Instead, they appear to be building the governance frameworks required to use AI within controlled boundaries.

The best interpretation of this data is not that some industries are “ahead” and others are “behind”; it’s that AI adoption reflects the risk environment in which each industry operates.

For enterprise Martech leaders, this means AI maturity must be assessed in context. A conservative policy may reflect immaturity, but it may also reflect appropriate risk management.



Even if hallucination rates hit zero, I’ll still want a human in the loop when risk is high and when the brand needs to stand out.

Chris Vitti, Sr. Director, Head of Marketing Technology, The Cigna Group



Consumer apps are becoming ground zero for external AI adoption because the business model rewards speed, iteration, and interface innovation. Marketplaces and aggregators are already letting AI get closer to the customer, not because the risk disappears, but because the upside is more immediate. In digital-first environments, customer experience is software, and AI is quickly becoming part of that software layer.

Juan Mendoza, Founder & CEO at The Martech Weekly

Content Supply Chain Maturity is an AI Readiness Test

Content is the first stress test of enterprise AI readiness.

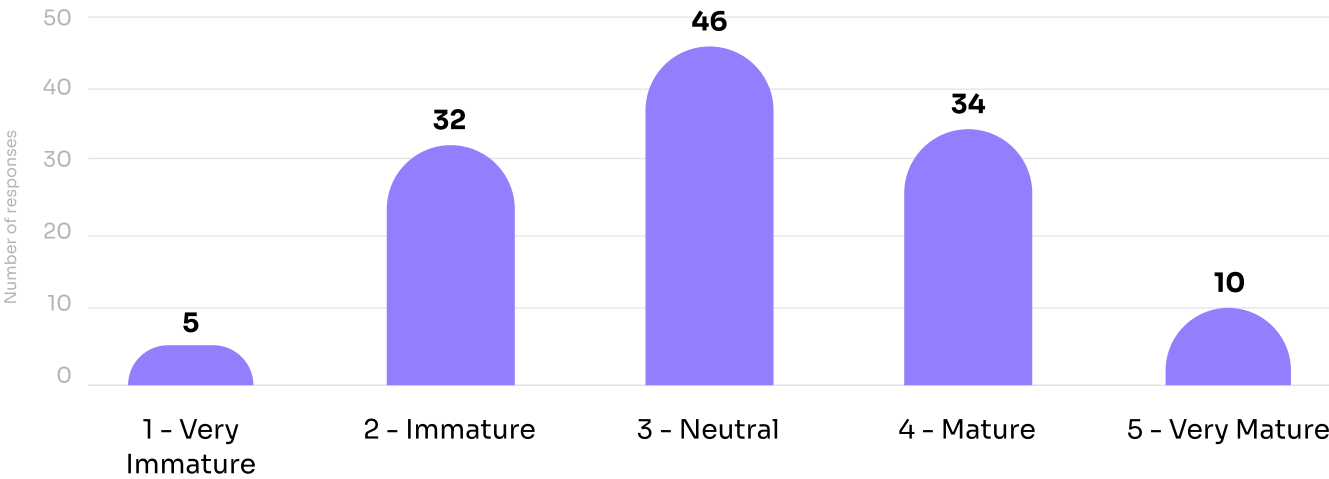
Generative AI has made content creation faster and more scalable, but it has also exposed whether organizations have mature workflows, approvals, metadata, localization processes, brand governance, and measurement systems.

The data reinforces this point. Organizations with mature or very mature content technology and AI capabilities are more likely to report reasonable, clear, or substantial AI impact on customer experience than the rest of the market (77.3% vs 50.6%; chi-square $p=0.006$).

Content maturity and AI impact on customer experience are also positively correlated as ordered variables (Spearman’s $\rho=0.34$; $p<0.001$).

Content Supply Chain Maturity

Rate your company’s capability in using technology and AI to automate, scale, and manage content production



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

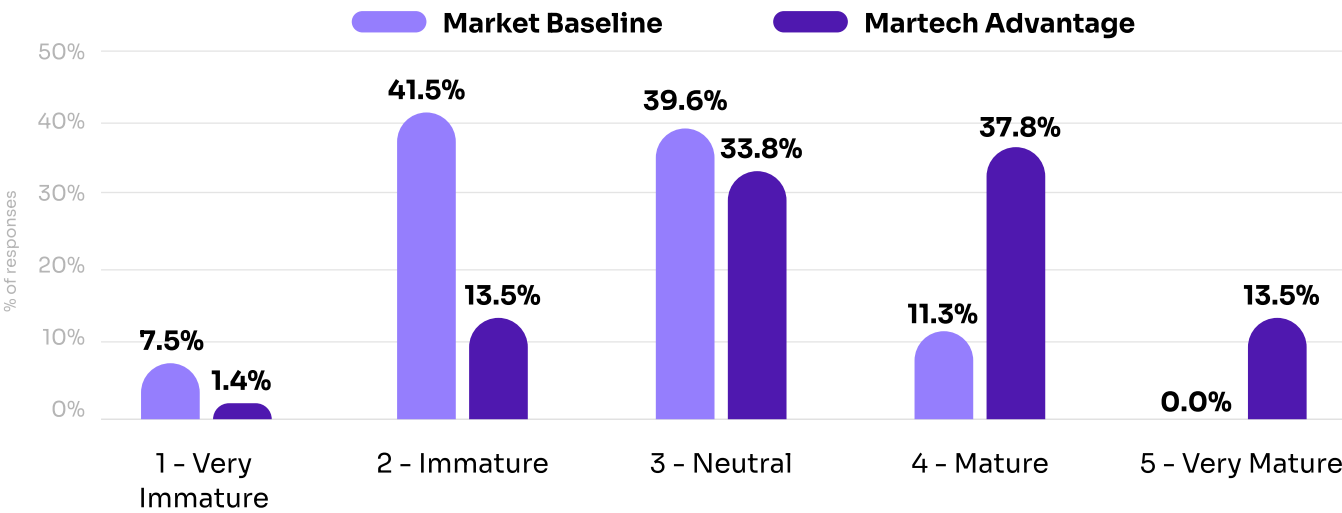
Figure 36: Self-assessed maturity of enterprise content technology and AI capabilities.

Across the market, content technology maturity follows a relatively balanced distribution. Some organizations are already using technology and AI to support mature content operations, while

others remain at early stages of capability development. The sharper distinction appears when comparing Martech Advantage and Market Baseline organizations.

Content Supply Chain Maturity

Rate your company’s capability in using technology and AI to automate, scale, and manage content production.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 37: Content technology and AI maturity: Martech Advantage vs Market Baseline.

EXTERNAL FORCES

Among Market Baseline organizations, only **11.3%** rate their content technology and AI capability as mature or very mature. Among Martech Advantage organizations, **51.4%** do. Content maturity is strongly associated with marketing and customer interaction maturity (chi-square **$p < 0.001$** ; Spearman's rho=0.53, **$p < 0.001$**).

This is a critical finding because content is where many organizations first experience the operational reality of AI at scale. A team can generate more content with AI, but without workflow governance, brand controls, content operations and measurement, the result is simply faster content chaos.

The lesson is that content is often where the **AI Readiness Gap** first becomes visible.



Building a strong content supply chain isn't about the technology stack alone. Organizations with mature foundations across people, processes, and data are far more successful in adopting and scaling AI.

Strong governance, well-designed workflows, structured metadata and taxonomy, and, crucially, effective, ongoing change management to maximize user adoption create the conditions for success. Get those foundations right first, then let technology and AI accelerate and amplify the value they deliver.

**Kristina Huddart, Content Operations Consultant & Founder,
Huddart Consulting Limited**

Research Insight

AI value depends on enterprise **readiness**.

The research shows that AI is having a faster impact inside marketing workflows than customer experience, and the clearest readiness signal is content supply chain maturity: governance, workflow, metadata, and measurement that allow AI-generated work to scale safely.

Data Platform-Centricity

Terminology

In this report, Cloud Data Platform is used to signify hyperscaler enterprise data platforms (e.g. Snowflake, AWS, Google Cloud Platform). We retain “warehouse-native” as the established industry term for Martech applications that operate directly on data in this environment.

The Cloud Data Platform is now firmly one of the most important systems influencing the enterprise Martech stack.

It is rarely owned by marketing. It may sit with IT, data, analytics, or enterprise architecture teams. It is also not where every customer interaction is executed. Activation still happens across campaign platforms, CDPs, customer engagement platforms, ad platforms, content systems, decisioning engines, and channel-specific tools.

But its influence over Martech is increasing because so many of the capabilities Martech

leaders now care about depend on the Cloud Data Platform as a foundation.

Enterprise Martech is still primarily executed through the application layer: the tools used to send messages, manage campaigns, personalize websites, analyze behavior, and orchestrate journeys. But many of those workflows now depend on the enterprise data foundation beneath them.

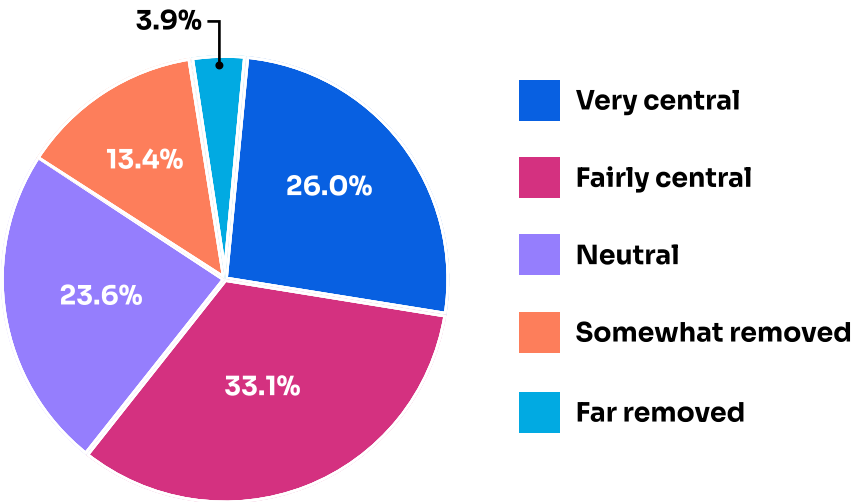
The key question is how central the Cloud Data Platform has become to the way enterprise Martech stacks are designed, governed, measured, and operated.

The Cloud Data Platform Is Central to Enterprise Martech

Enterprise Martech architectures are increasingly organizing around the Cloud Data Platform.

Cloud Data Platform Integration

How central is your Cloud Data Platform to your Martech stack?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Very central: We have warehouse-native platforms in our stack and host them as native apps within the warehouse’s infrastructure

Fairly central: We have some warehouse-native Martech platforms in our stack

Neutral: Data from our data warehouse is readily accessible to our Martech platforms.

Somewhat removed: Our Martech stack has limited access to data from the data warehouse

Far removed: Accessing data from the data warehouse for Martech is difficult

Figure 38: Extent to which enterprise Martech stacks are connected to, or centered around, the Cloud Data Platform.

59.1% of surveyed organizations report that their Martech stack is either fairly central or very central to the Cloud Data Platform, meaning they actively use warehouse-native platforms or rely on the Cloud Data Platform as a meaningful part of their Martech architecture.

Only **17.3%** report that their Martech stack remains somewhat or completely disconnected from the Cloud Data Platform. This is a meaningful signal of architectural centrality.

For years, the Cloud Data Platform often sat adjacent to Martech. It supported analytics, reporting, data science, and business intelligence, while marketing teams continued to work primarily inside application-layer platforms.

Borrowing from Snowflake's framing of **data gravity**, the more customer data, models, governance, and analytical workloads accumulate in the Cloud Data Platform, the more surrounding applications and workflows are pulled toward it. Martech is experiencing exactly this shift. As customer data becomes more centralized, the systems that depend on that data increasingly need to connect back to the platform where it lives.

The Cloud Data Platform is becoming a **central dependency** of the stack.



Enterprise Martech is not moving into the Cloud Data Platform; it is increasingly being organized around it. It doesn't replace the systems marketers use to execute. It gives those systems a governed data foundation, making the stack more connected, measurable and intelligent.

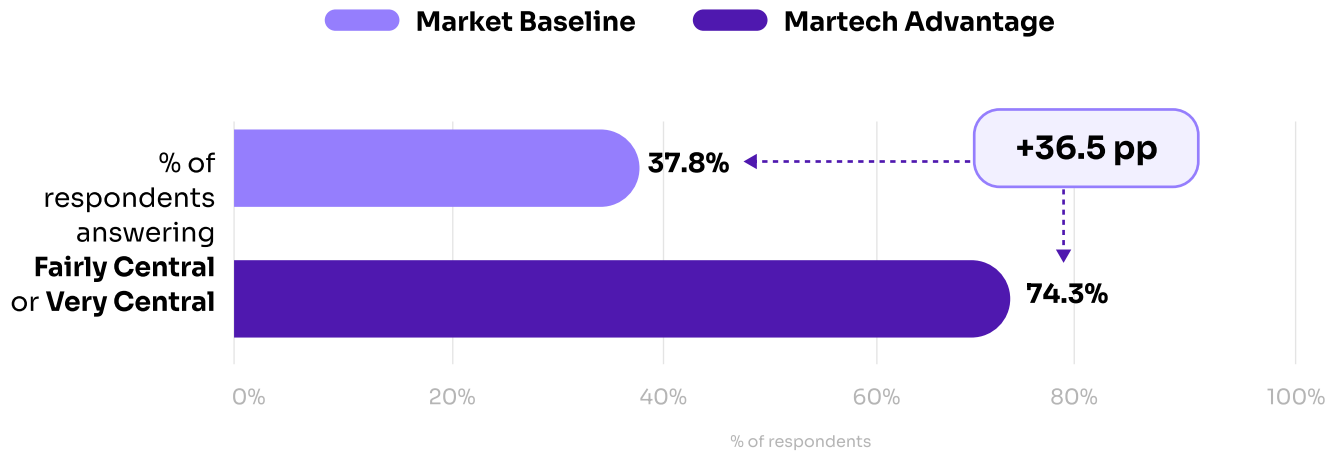
Juan Mendoza, Founder & CEO at The Martech Weekly

Organizing The Stack Around the Cloud Data Platform is a Martech Advantage

The relationship between data platform-centric architecture and marketing and customer interaction maturity is one of the clearest signals in this section.

Cloud Data Platform Integration into Martech

How central is your Cloud Data Platform to your Martech stack?



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 39: Cloud Data Platform centrality: Martech Advantage vs Market Baseline.

A significant **74%** of Martech Advantage organizations operate with a fairly central or very central Cloud Data Platform architecture. Among Market Baseline organizations, only **38%** have reached this level of integration. The contrast is important because it suggests that data platform-centricity is associated with stronger customer experience capability.

Martech Advantage organizations are more likely to have moved beyond basic data access and toward a Martech architecture where centralized customer data meaningfully supports execution, measurement, and decision-making. They are better positioned to unify customer signals, activate audiences, measure performance, and support more consistent experiences across channels.

Market Baseline organizations, however, are more likely to operate in a neutral or disconnected model where customer data may exist in the enterprise, but is not sufficiently connected to the systems and workflows that shape customer experience.

Modern Martech depends on the movement of data across systems. Having customer data in the organization is not the same as having customer data available to the Martech stack in a usable, governed, and timely way.

Centrality Is Not Full Martech Maturity

The most common explicit marketing use cases for the Cloud Data Platform remain foundational.

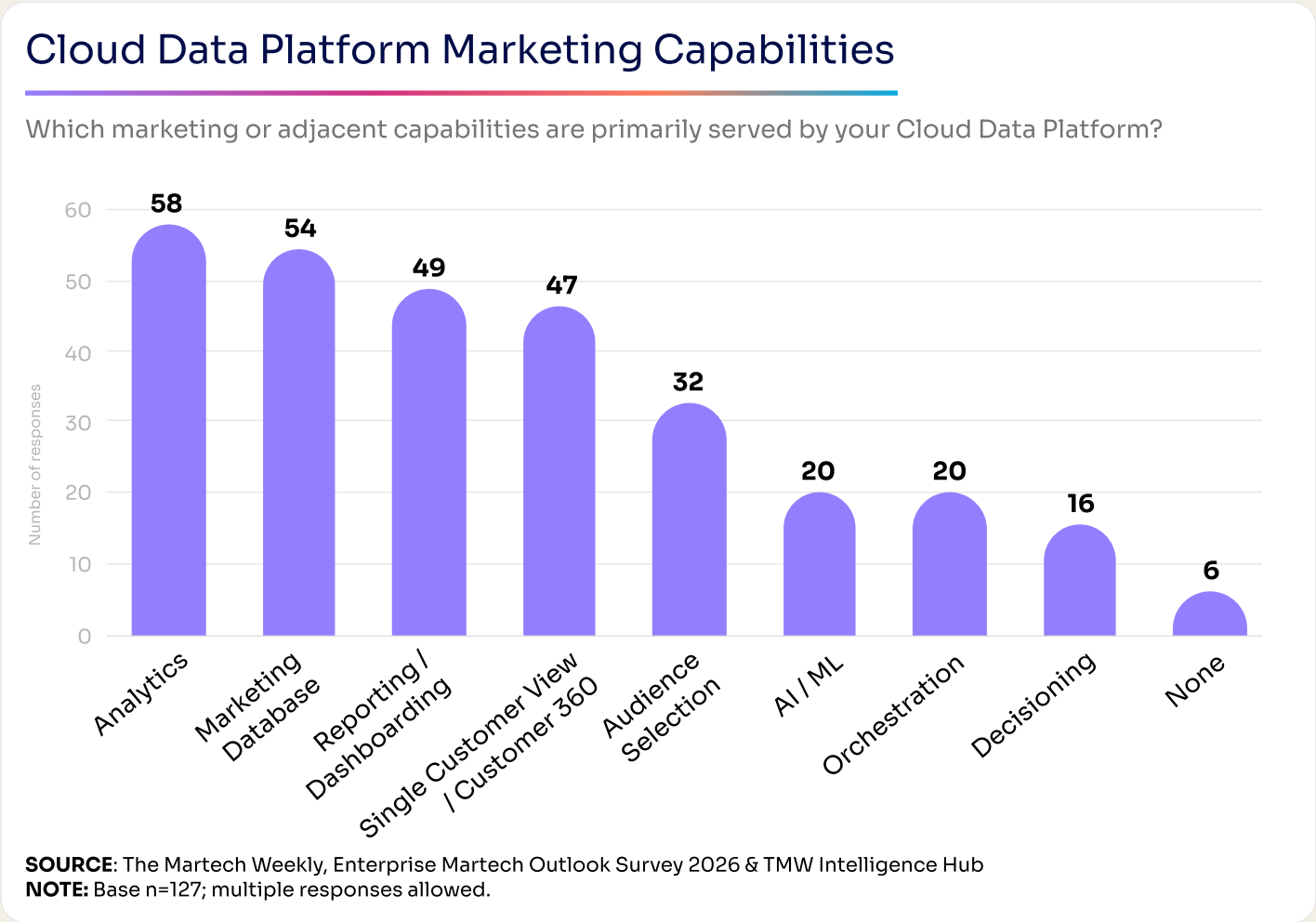


Figure 40: Primary marketing use cases supported by the Cloud Data Platform.

Across enterprise organizations, the Cloud Data Platform is most commonly used for analytics, marketing data marts, reporting and dashboarding, and hosting or supporting the single customer view.

These use cases provide the measurement, aggregation, and customer understanding required for enterprise marketing. But they also show that many organizations are still using the Cloud Data Platform primarily to organize and understand customer data, rather than to support more advanced orchestration, decisioning, and real-time use cases.

Centrality is therefore a necessary step, but not a final state. The value comes when the data foundation becomes usable by the systems, teams, and workflows that shape customer experience.

This is the Centrality Gap: the gap between the Cloud Data Platform becoming structurally important to Martech and organizations fully realizing its value across the Martech operating model.

The Cloud Data Platform may be central to the architecture, but that does not automatically mean it is central to every Martech workflow. For many organizations, the next challenge is expanding the ways that data foundation supports audience creation, measurement, personalization, decisioning, AI, and cross-channel execution in practice.



If you pull everything into the Cloud Data Platforms without a path back out, that center of gravity becomes a black hole, dooming good data to stay trapped forever. Orchestration can't be bolted on after the fact. Enterprises need to build it into the core of their Martech, or the right customer data never makes it back to the customer.

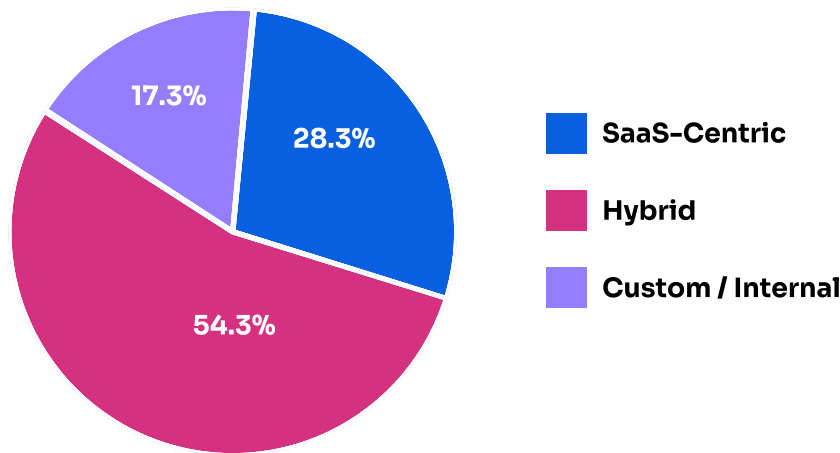
Zack Wenthe, Director of Product Marketing & Customer Data Evangelist at Tealium

Enterprise Analytics Is Hybrid or Custom by Default

Digital analytics shows how enterprise measurement is becoming more **custom-developed** and **data-platform connected**.

Analytics Approach

Which statement best describes your organization’s approach to digital (web/app) analytics?



SaaS-Centric

We rely primarily on out-of-the-box SaaS platforms (e.g. Google Analytics 4, Adobe Analytics, Heap) with minimal joining with non-digital data sources.

Hybrid

We use standard SaaS platforms but export some digital behavioral data into an internal Cloud Data Platform to join it with non-digital data sources.

Custom / Internal

We focus on joining digital behavioral data with non-digital data sources in our Cloud Data Platform environment.

SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 41: Enterprise approach to digital analytics and use of Cloud Data Platforms.

Most enterprise organizations use a Hybrid or Custom analytics model rather than relying on packaged SaaS analytics alone.

Only 28.3% describe their approach as SaaS-centric, while 54.3% use a Hybrid model and 17.3% rely primarily on Custom or Internal analytics.

The dominant model for enterprise digital analytics is now hybrid. Many organizations continue to use standard SaaS analytics platforms, such as Google Analytics or Adobe Analytics, while exporting digital behavioral data into the Cloud Data Platform to combine it with broader enterprise data.

This is a pragmatic pattern, in keeping with the other findings in this report.

SaaS analytics platforms remain useful for digital teams because they provide accessible interfaces, established reporting workflows, and channel-specific capabilities. But digital behavior increasingly needs to be connected to transactions, loyalty, CRM, consent, service, product, offline, and customer profile data. That broader context typically sits outside the analytics platform.

The result is not a wholesale rejection of packaged analytics tools, but a more hybrid role for those tools.

Packaged analytics platforms remain important collection and analysis tools, but the Cloud Data Platform is increasingly becoming the place where digital data is joined with the enterprise data that proves value.



Vendor dashboards are built for the average user, not for a multi-billion-dollar aftermarket parts business with 10,000 SKUs and complex regional pricing. We needed to join digital behavior with warehouse inventory and logistics data, something no out-of-the-box tool could handle. Custom builds let us ask questions that vendor reporting never anticipated, and we can iterate weekly without waiting for a product roadmap.

Rena Senoman, Senior Director, Customer Data Platforms at Stellantis North America

The Customer 360 Is Giving Way to the Contextual Customer View

The single customer view has been one of the longest-running ambitions in Martech. It is also one of the most difficult to achieve.

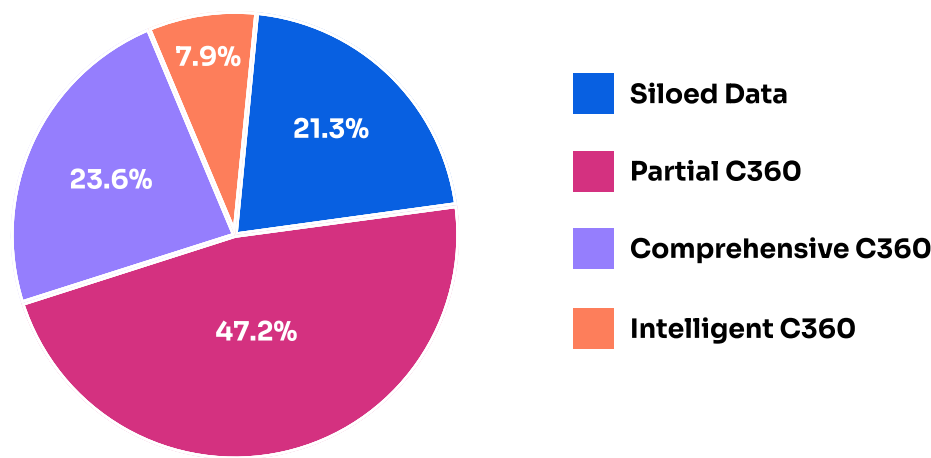
For years, organizations have pursued the idea of a complete, unified, all-knowing Customer 360. The promise is seductive: one complete view of every customer, interaction, preference, transaction, and signal.

The reality has been much harder.

Privacy constraints, data fragmentation, channel complexity, identity resolution challenges, system silos, and organizational ownership issues have made the all-encompassing Customer 360 extremely difficult to build and maintain.

SCV Maturity

Which of the following best describes the maturity of your organization’s unified customer view / customer 360?



Siloed Data	Customer data exists but is trapped within individual applications. There is no cross-channel view, and reporting is manual and inconsistent.
Partial C360	Key structured data sources are centralized in a data platform, but the view is still incomplete and inconsistent.
Comprehensive C360	A reliable, single view of the customer exists based on all key structured data, providing a clear, trusted historical record of what customers did.
Intelligent C360	The comprehensive C360 is now enriched with unstructured data providing a complete view of not just what customers did but their underlying sentiment and intent.

SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub
NOTE: Single customer view categories follow the definitions from Snowflake’s Modern Marketing Data Stack 2026.

Figure 42: Maturity of the single customer view across enterprise organizations.

Our research shows that many enterprise single customer views remain incomplete. A large share of organizations still operate with customer data trapped in application silos or only partially integrated across systems.

This does not mean the single customer view is dead; it just means the definition and target state is changing.

The strongest organizations are increasingly moving away from the fantasy of an omniscient Customer 360 and toward a more practical model: a customer view that is sufficiently unified, governed, and actionable to support priority use cases.

This is better understood as a **Contextual Customer View**.

A Contextual Customer View does not attempt to know everything about every customer at all times. Instead, it focuses on assembling the customer data needed to support the next meaningful decision, interaction, measurement requirement, or moment of personalization.

The goal is to have usable, right-sized context based on the situation or use case, not an all-knowing profile at every point of interaction.



Partial is the normal, permanent state of customer data - 'complete' is a moving target - the moment a new channel, new use case, new product appears, you're back to 'partial'. Real SCV maturity is appreciating that reality and having a practical, repeatable process and framework to manage the ongoing evolution, extensibility and adaptation of your customer data as an asset.

Troy Muir, Director of Marketing Ops, Keypath | Founder, StackOverlap

Building A More Comprehensive Contextual Customer View is a Martech Advantage

Single customer view maturity also distinguishes Martech Advantage organizations from the Market Baseline.

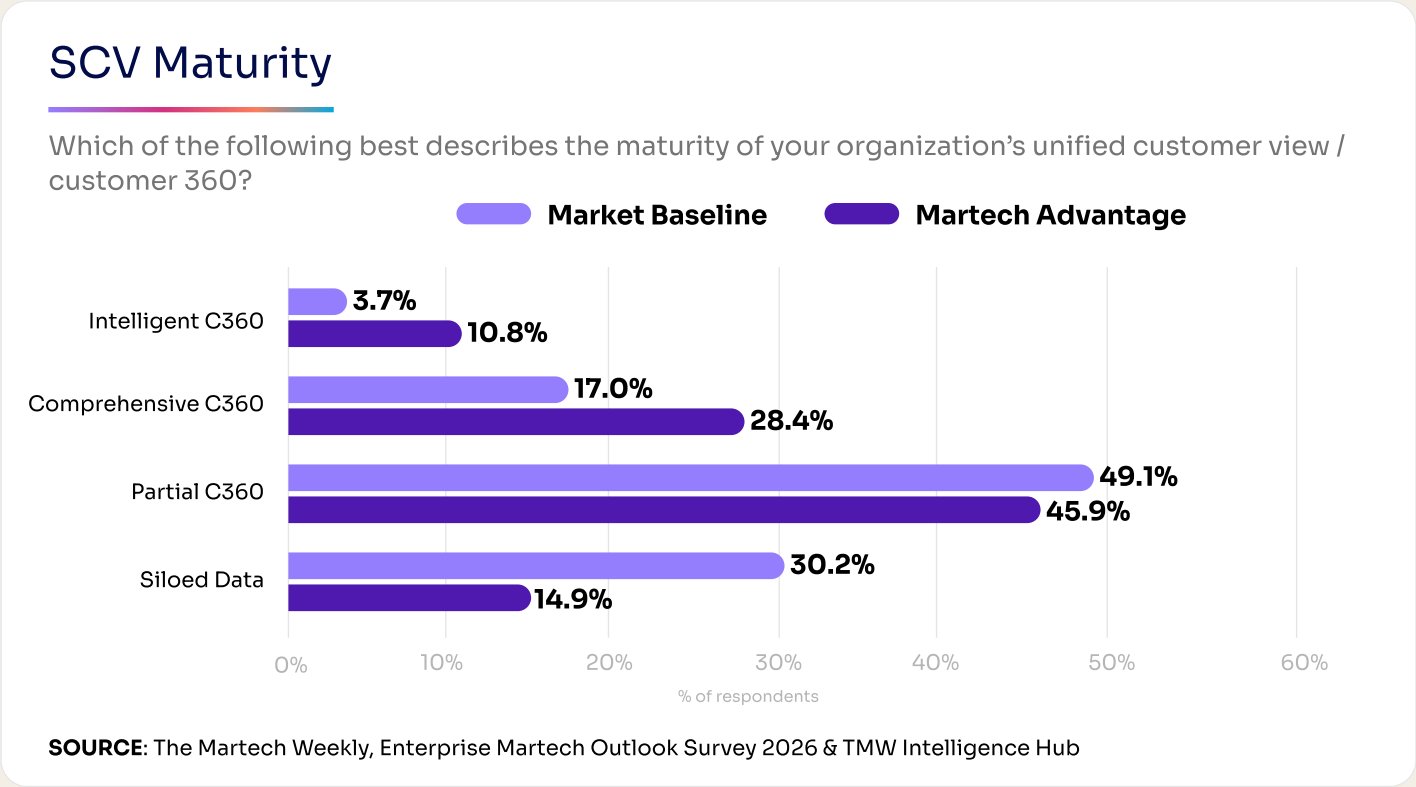


Figure 43: Single customer view maturity: Martech Advantage vs Market Baseline.

DATA PLATFORM-CENTRICITY

Market Baseline organizations are more likely to operate with siloed or partially integrated customer views. Martech Advantage organizations are more likely to have developed more comprehensive or intelligent customer views that can support cross-channel decision-making and activation.

This finding reinforces the broader data platform-centricity story.

Customer experience maturity depends on the ability to turn fragmented customer signals into usable customer context. Organizations do not need a perfect Customer 360 to improve CX, but they do need a data foundation that is coherent enough to support action.

The difference between a partial customer view and a Contextual Customer View is not theoretical. It determines whether a brand can recognize customers consistently, suppress irrelevant messages, personalize interactions, connect digital and offline behavior, measure customer value, and coordinate decisions across channels.

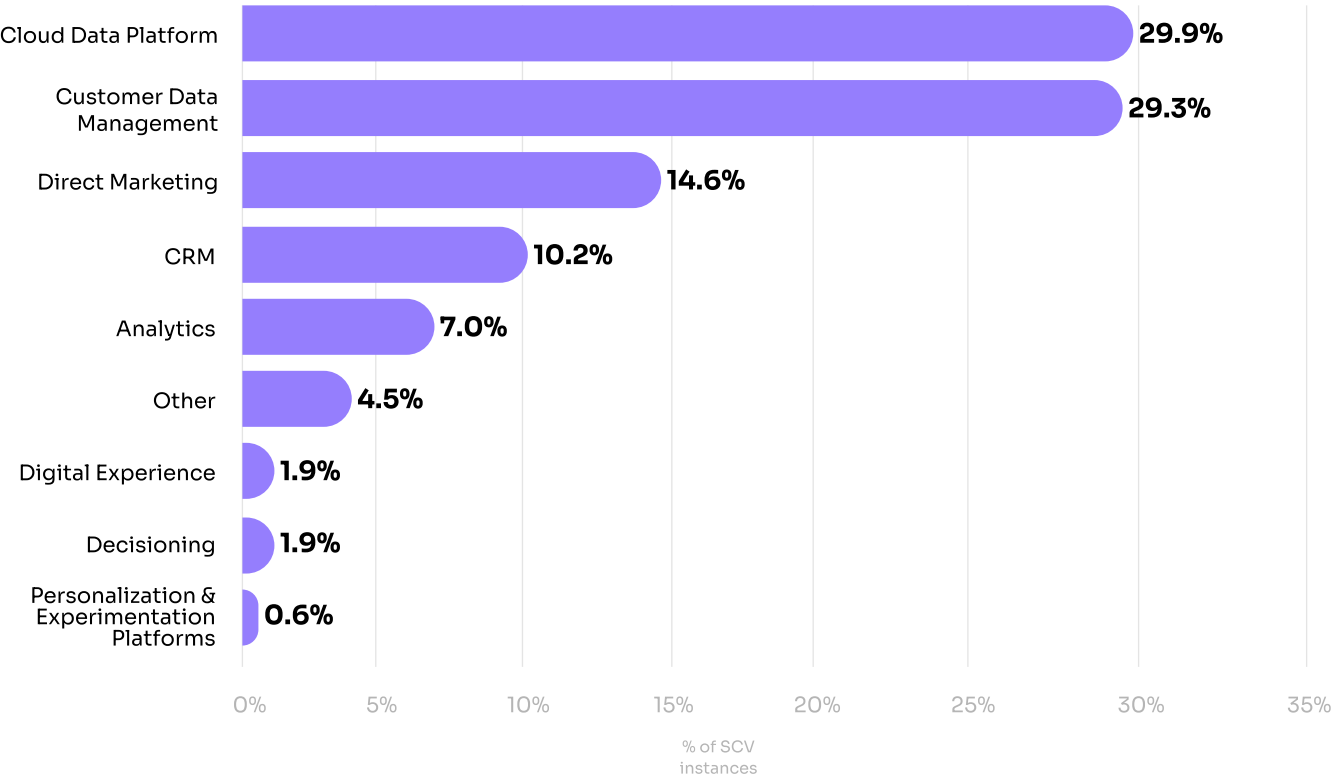
That is why the Cloud Data Platform is becoming so important. It provides the architectural foundation for moving from fragmented data to usable customer context.

Where the Customer View Lives Still Varies Widely

While the Cloud Data Platform is becoming more central, the single customer view does not live in the same place for every organization.

SCV Platform Categories

Share of SCV instances by platform category



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

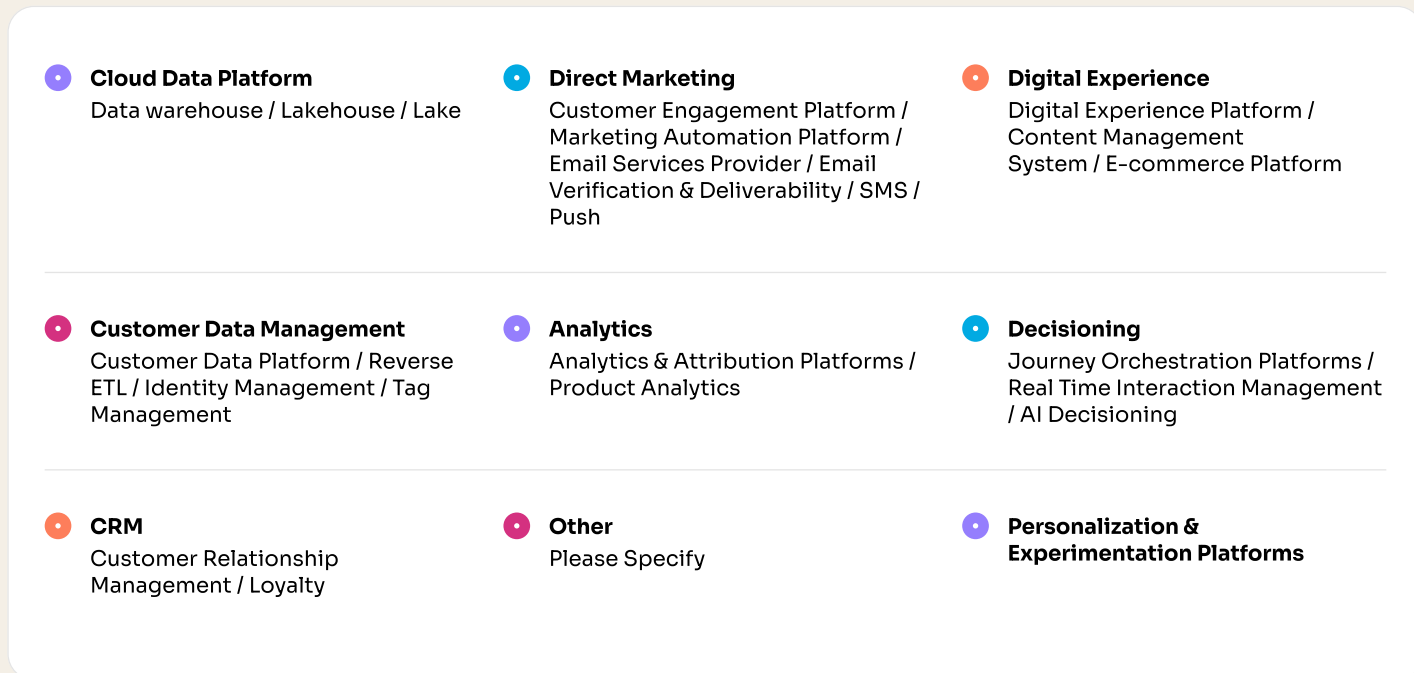


Figure 44: Platform categories used to host or support the single customer view.

Across enterprise stacks, the single customer view is hosted or supported across a range of platforms, including Cloud Data Platforms, customer data platforms, CRM systems, marketing suites, analytics environments, and internally developed systems.

This variation reflects the reality of enterprise architecture. There is no universal pattern for where the customer view must live. Different organizations have different legacy systems, governance requirements, data models, vendor ecosystems, and activation needs.

However, the broader direction is clear: the customer view is moving closer to the enterprise data foundation.

For some organizations, that means the Cloud Data Platform becomes the primary home of unified customer data. For others, it means the Cloud Data Platform supports a CDP, CRM, or activation platform that presents and operationalizes the customer view. In many ways, the Cloud Data Platform is the new baseline across the customer view and analytics.

Research Insight

Data platform-centricity is a defining feature of enterprise Martech maturity, but centrality alone is not enough. The advantage comes when the Cloud Data Platform becomes usable across activation, measurement, AI, decisioning, and customer-context workflows.



The Cloud Data Platform is becoming the new baseline for customer data in leading marketing organizations. As the customer view moves closer to the enterprise data foundation, Martech leaders need architectures that make data unified, governed, accessible and actionable across the systems shaping customer experience. Whether through a CDP, CRM, activation platform or warehouse-native layer, the mandate is the same: customer data has to be ready for use.

Juan Mendoza, Founder & CEO at The Martech Weekly

Decisioning

If data platform-centricity is about making customer data more central to Martech, decisioning is about turning that data into action.

Decisioning determines which message, offer, experience, recommendation, content, or next best action a customer receives at a given moment. It is the connective tissue between customer data, business rules, AI models, channel execution, and the customer experience itself.

This capability is becoming more important because the number of customer touchpoints has exploded. Consumers now move fluidly across websites, apps, email, SMS, paid media, call centers, stores, marketplaces, connected devices, and social platforms. Customers experience these as one brand, not as separate channels.

The enterprise, however, **often does not operate that way.**

Marketing, sales, service, commerce, loyalty, and product teams frequently make decisions through different systems, rules, data sets, and priorities. The result is one of the most persistent challenges in enterprise customer experience: fragmented decisioning.

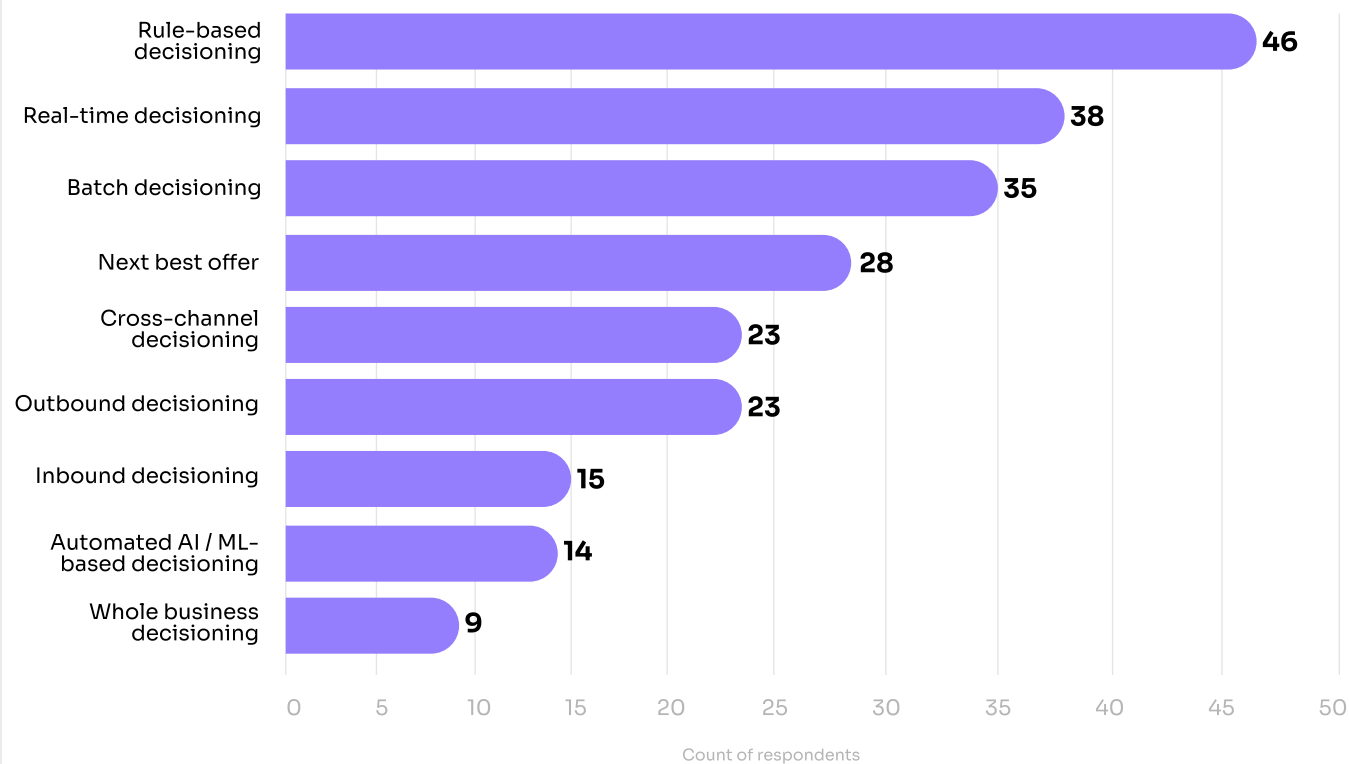
As AI, personalization, warehouse-centric architectures, and real-time customer expectations continue to accelerate, decisioning is moving from a campaign capability to a core enterprise architecture concern.

Decisioning Is Still More Foundational Than Intelligent

The first finding is that enterprise decisioning remains grounded in **foundational logic**.

Decisioning Capabilities

Which of the following decisioning capabilities does your organization have? Select all that apply.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub
NOTE: Base n=127; multiple responses allowed.

Figure 45: Decisioning capabilities currently used by enterprise organizations. Respondents could select multiple capabilities.

Rules-based decisioning remains the most common capability across the market, with many organizations still relying on predefined logic to determine customer treatments. Scheduled batch decisioning is also widespread, reflecting the continued importance of pre-planned campaigns, segmented audiences, and periodic data refreshes.

Real-time decisioning is also present in a meaningful share of organizations, but more advanced capabilities remain less common. AI / ML-driven decisioning and whole-business decisioning are still comparatively nascent.

This suggests that most enterprise organizations are not yet operating in a fully dynamic decisioning environment.

They may have decisioning capability, but it is often channel-specific, campaign-oriented, rules-based, or batch-dependent. These capabilities remain useful. Rules and batch logic are not obsolete. In many cases, they provide the control, transparency, and governance that enterprise teams need, but they also reveal the current ceiling of decisioning maturity.

A rules-based decisioning model can support structured personalization. A scheduled batch model can support lifecycle campaigns. But neither is sufficient on its own for organizations seeking to coordinate adaptive, real-time customer interactions across fragmented touchpoints.



Complex decisioning has been used since the 90s, and as the engine of advanced behavioral journey orchestration, for well over a decade. But recent reductions of the term ‘decisioning’ to include lesser capability have fostered widespread misunderstanding of one of Martech’s most powerful contributions to business. To discern appropriate management and technology application, leaders should embed both decisioning theory and practice within their teams (agnostic of vendors).

Aarron Spinley, Fellow at The Field Bell Institute



Rules-based decisioning is not dead. It is still the foundation of most mature Martech programs because it is transparent, governable, and easy to explain. But AI-based and agentic decisioning open new possibilities in fuzzy scenarios where intent, timing, and context are less obvious. The future is not rules or AI. It is rules, AI, and human judgment in the right balance.

Rasmus Houliind, Founder of The Omnichannel Institute

The Whole-Business Decisioning Gap

The most revealing finding is that only a small number of organizations report having whole-business decisioning capabilities.

This is the Whole-Business Decisioning Gap: the gap between the way customers experience a brand and the way enterprise decisions are made internally.

Customers do not distinguish between a marketing message, a service interaction, a loyalty offer, a product recommendation, and a commerce experience. To the customer, each interaction contributes to one overall relationship with the brand, but inside the enterprise, those decisions tend to be fragmented.

Marketing may decide who receives an email. Commerce may decide what offer appears on site. Service may decide what support experience a customer receives. Loyalty may decide which reward is presented. Paid media may decide which audience is targeted. Each decision may be logical in isolation, but collectively they may not add up to a coherent customer experience.

Whole-business decisioning is difficult because it requires more than technology. It requires shared customer data, aligned business rules, consistent governance, decision rights across functions, and agreement on how customer value should be optimized across the enterprise.

This is also why so few organizations have achieved it.



Customer Decisioning across the whole business is rare not because the technology is missing, but because the organization is. It's about structure - who owns the decision, which function it sits in, and what they're incentivized to optimize for. Get that right, and decisioning lets organizations do what's right for every customer, not guess.

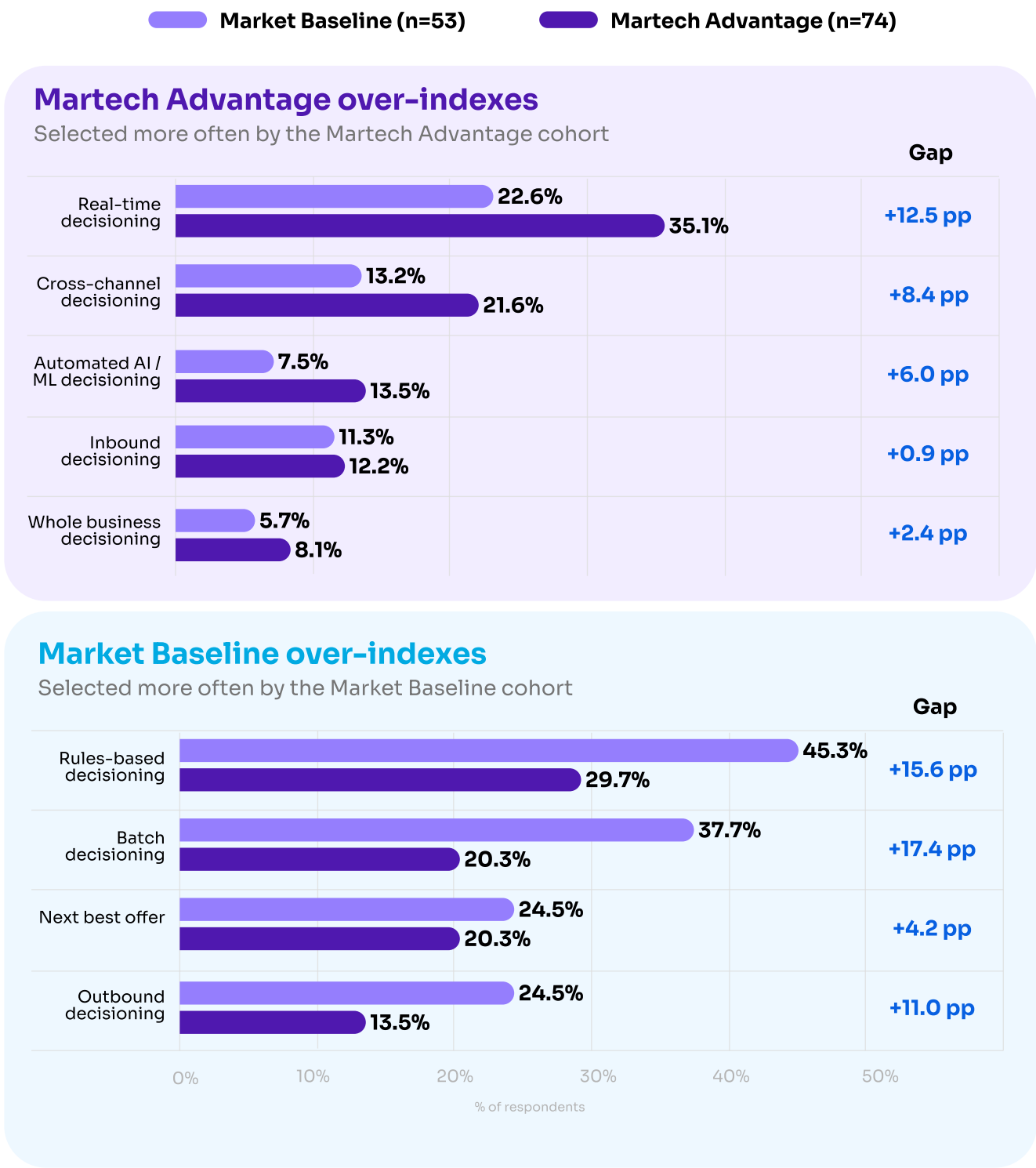
Pawan Verma, Head of MarTech and Decisioning, Bupa Australia and Founder, Customer Decisioning Guild

Dynamic Decisioning is a Martech Advantage

Decisioning maturity differs meaningfully between Martech Advantage and Market Baseline organizations.

Decisioning Capabilities by Cohort

Grouped by where each capability over-indexes relative to the comparison cohort. (Ordered within each section by Martech Advantage frequency. Multi-select question.)



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 46: Decisioning capabilities: Martech Advantage vs Market Baseline. Respondents could select multiple capabilities.

Market Baseline organizations are more likely to rely on rules-based and scheduled batch decisioning. This indicates a more static decisioning environment, where customer treatments are often pre-defined, channel-specific, and dependent on periodic data refreshes.

Martech Advantage organizations show a different pattern: they are more likely to use real-time decisioning, cross-channel decisioning, and AI / ML-driven decisioning. This does not mean Martech Advantage organizations have fully solved enterprise decisioning, but it does suggest they are further along the shift from static campaign logic to more dynamic customer orchestration.

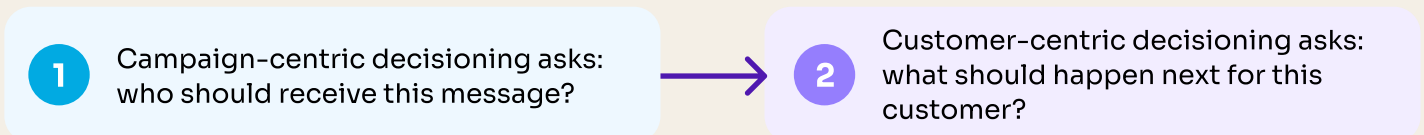
This is important as modern customer experience increasingly depends on timing, context, and coordination.

A customer's eligibility, intent, preferences, value, consent status, and recent behavior can change quickly. Organizations that rely primarily on batch logic or isolated channel rules may struggle to respond to those changes in a timely and coherent way. Martech Advantage organizations are better positioned to make decisions closer to the customer moment.

This is where data platform-centricity, contextual customer views, and decisioning begin to connect. The value of customer data increases when it can inform decisions; the value of decisioning increases when it is connected to timely, governed, and usable customer context.

From Campaign Decisions to Customer Decisions

A major distinction in enterprise Martech is campaign-centric decisioning versus customer-centric decisioning.



That may sound like a subtle distinction, but it's a distinctly different way of interacting with a customer.

Campaign decisioning is typically owned within marketing. It is often tied to specific channels, segments, journeys, or promotions. Customer decisioning requires a broader view. It must account for the customer's relationship with the brand, recent behavior, commercial value, consent status, service history, current context, and competing business priorities.

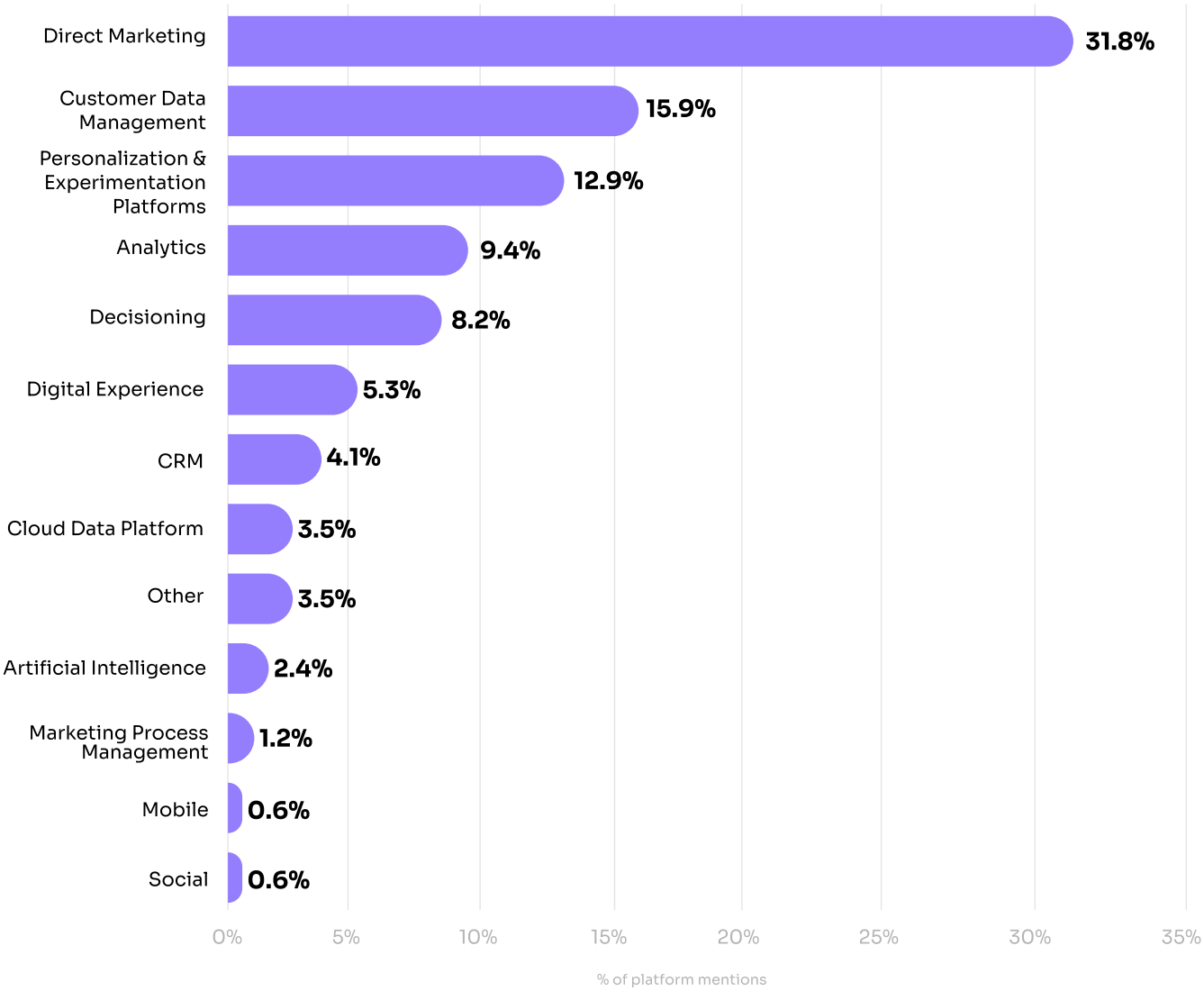
With mature customer data foundations, the ability to decide what happens next becomes a critical capability. Data, AI and channels alone do not create customer experience. Customer experience is created through making decisions – good decisions – at scale.

Decisioning Technology Remains Fragmented

The technology landscape for decisioning also remains fragmented.

Platform Categories Used for Decisioning

Share of decisioning platform mentions by platform category



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

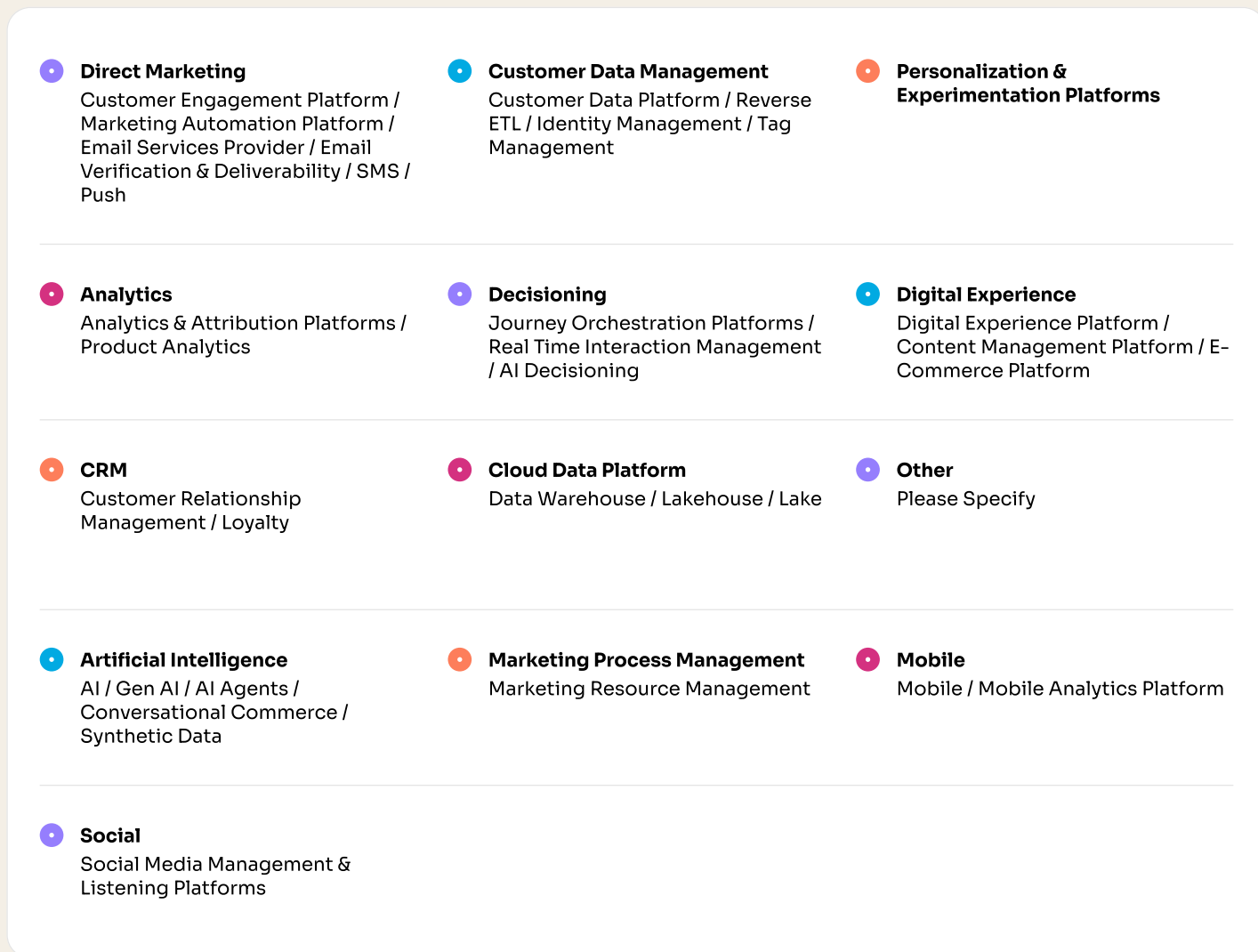


Figure 47: Platform categories used to support enterprise decisioning capabilities.

Across enterprise stacks, decisioning capabilities are distributed across a wide range of systems, but they are not evenly distributed. The largest share of decisioning instances sits in **Direct Marketing** platforms, including customer engagement, marketing automation, email, SMS, and push platforms, which account for **31.8%** of all decisioning platform mentions. This suggests that, in many organizations, decisioning is still closely tied to campaign execution and outbound customer engagement.

Customer Data Management platforms are the next most common home for decisioning, representing **15.9%** of mentions, followed by Personalization & Experimentation platforms at **12.9%**, Analytics platforms at **9.4%**, and dedicated Decisioning platforms at just **8.2%**. In other words, enterprise decisioning is more often embedded inside adjacent systems than owned by purpose-built decisioning technology.

This fragmentation is understandable.

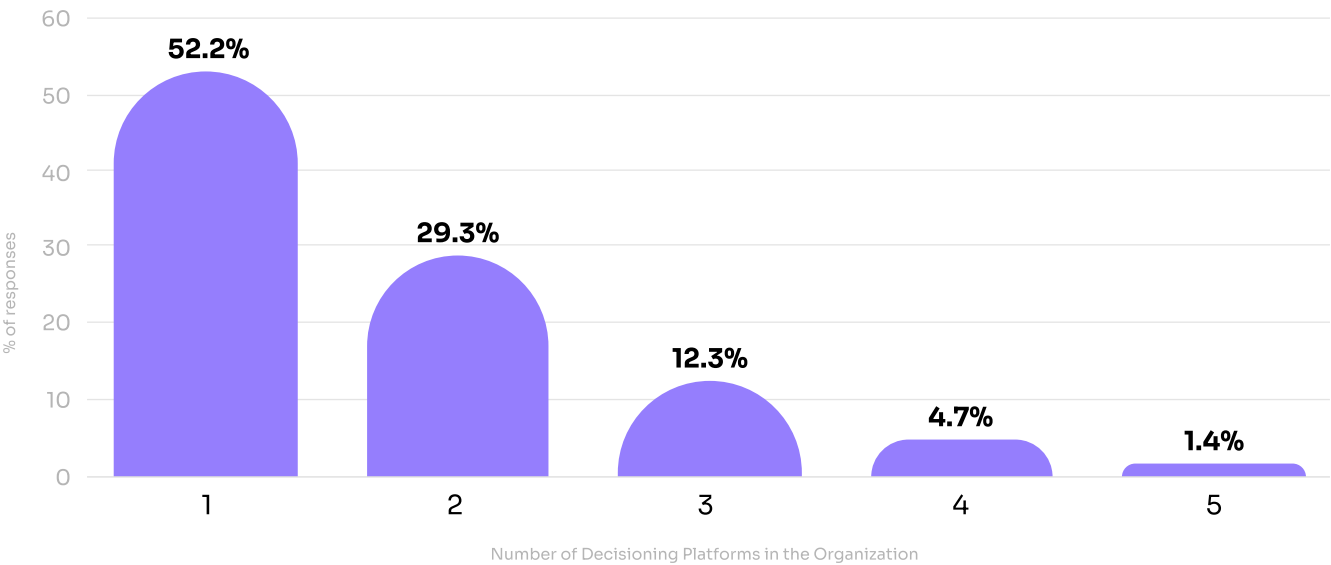
Decisioning happens in many places because customer interactions happen in many places. Different channels, teams, and functions have developed their own logic over time, especially in platforms designed to activate campaigns, personalize experiences, analyze behavior, or manage customer data.

But this also creates risk. When different systems make customer decisions independently, organizations can struggle to coordinate treatments, enforce consistent governance, avoid conflicting messages, and measure decision quality across the customer journey.

This is why decisioning is increasingly becoming an **architecture question** rather than a tool-category question. The goal is not necessarily to consolidate every decision into one platform, but to ensure that decisioning logic, customer context, governance, and measurement are coordinated across the systems that shape the customer experience.

Number of Decisioning Platforms by Company

% of survey participants by number of decisioning platforms in their organization



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 48: Number of different Decisioning platforms within enterprise Martech stacks.

Research Insight

Decisioning is where customer data becomes **customer treatment**. Most organizations have decisioning capability, but fewer have coordinated, real-time, cross-channel or whole-business decisioning. The priority is governed coordination, not more automation or fewer platforms.

External Forces: Key Implications

The findings across this section point to a clear conclusion: AI, warehouse-centric architectures and decisioning are connected pressure points. Each tests whether enterprise Martech teams have the data foundations, governance structures, operating models and measurement discipline required to turn new capability into business value.

Content Supply Chain Maturity is an AI Readiness Signal

Content is where many organizations first encounter the operational reality of AI at scale. Mature content technology and AI capability correlate strongly with marketing and customer interaction maturity and with reported AI impact on customer experience. The implication is practical: AI readiness depends on workflow governance, metadata, approvals, brand controls and measurement, not just access to generative tools.

The Cloud Data Platform is a Martech Dependency

The Cloud Data Platform does not replace the application layer, but more of the application layer depends on it. Identity resolution, analytics, AI, personalization, decisioning, audience activation, measurement, and customer understanding all rely on stronger data foundations. The maturity gap is whether that foundation is usable across the workflows that shape customer experience.

External Pressure Rewards Internal Discipline

Most enterprise organizations can access similar tools, platforms and vendors. The difference is operational discipline: the ability to govern complexity, connect data to action, measure value and coordinate decisions across functions. External forces expose organizations that lack clear ownership, usable customer context, mature governance and the ability to move from experimentation to execution.

2026 Enterprise Martech Advantage Benchmarks

The following benchmarks translate the research into practical guidance for enterprise consumer-brand Martech leaders. They act as operating targets that help leaders justify their stacks, spend, and strategy in 2026.

Benchmark Area	2026 Benchmark	Why This Recommendation
• Value proof	Demonstrate clear contribution to financial or accepted financial-proxy objectives.	Teams with clear value proof were 18.5 percentage points more likely to secure budget increases (56% vs 37.5%; $p=0.043$).
• Renewal governance	Manage Martech renewals proactively, not passively or ad hoc.	Proactive renewal management was associated with much stronger value demonstration (70.9% vs 41.7%; $p=0.002$).
• Architecture	Use Hybrid as the default, but justify best-of-breed where the Cloud Data Platform is central.	82.1% of composable / best-of-breed organizations reported fairly or very central data-platform architecture ($p=0.009$).
• AI readiness	Pair dedicated AI funding with content operations maturity and human-in-the-loop customer-facing controls.	Organizations with mature content operations were more likely to report meaningful AI impact on customer experience (77.3% vs 50.6%; $p=0.006$).
• Decisioning	Treat multiple decisioning platforms as acceptable only when decisioning logic, customer context, and governance are coordinated.	Organizations with two or more decisioning platforms were more likely to report budget growth and effective operating models; platform count also correlated with decisioning capability breadth (Spearman's $\rho=0.57$; $p<0.001$).
• KPI architecture	Use a unit-economics KPI bundle: CLV, retention, CAC, conversion, and budget effectiveness.	These metrics connect Martech to customer value, acquisition efficiency and financial proxies more directly than sentiment scores alone.

The common thread is discipline. Enterprise leaders should always default to asking whether the stack produces enough proof, governance and customer context to justify continued investment.

Challenges & Opportunities

To understand how enterprise Martech leaders are planning for 2026, we asked respondents two open-ended questions: what they see as their biggest Martech opportunity, and what they expect to be their biggest Martech challenge over the next 12 months.

The responses show a clear pattern. Leaders are not short on ambition. They see opportunity in AI, automation, customer data activation, personalization, and stack simplification. But the challenges are equally clear: fragmented data, AI operationalization, legacy complexity, resource constraints, and the ongoing difficulty of proving value.

In other words, the opportunity set is expanding, but so is the operational burden required to capture it.

For this analysis, free-text responses were coded into themes. Responses could be assigned to more than one theme where they referenced multiple issues. Blank, unclear, or unusable responses were excluded from the analysis. The usable base was 126 responses for opportunities and 127 responses for challenges.

The Opportunity-Constraint Mirror

The most useful reading of the free-text responses centers on the tension between what leaders want to scale and what prevents them from scaling it. The same themes appear on both sides of the ledger: **AI, customer data activation, and stack simplification.**

Theme	Opportunity Signal	Challenge Mirror	Implication for Martech Leaders
AI and automation	59 responses; practical use cases in content, segmentation, reporting, campaign planning and workflow automation.	39 responses; governance, skills, risk, privacy, ROI and integration.	Scale AI as operating model change, not tool testing.
Customer data activation	53 responses; first-party data, personalization, journey orchestration and lifecycle engagement.	44 responses; fragmentation, integration and identity.	The prize is personalization and retention; the blocker is trusted data at the point of decision.
Stack simplification and value extraction	45 responses; simplify the stack, improve utilization, and get more from existing platforms.	38 responses; cost, legacy complexity, resource constraints, and replatforming risk.	Treat simplification as governance, not cost-cutting.

The deeper pattern is the mirror image between ambition and constraint. Enterprise leaders are not short of opportunities. They are short of operating capacity. The 2026 challenge is to convert AI, data and simplification from strategic themes into governed execution systems.

Research Insight

The free-text responses show the same pattern from opposite angles: AI, customer data and simplification are both the biggest opportunities and the hardest execution problems. Advantage depends on turning them into **governed operating systems**, not isolated projects.

The Enterprise Martech Landscape

The global Martech market is now too large to navigate with confidence using general market maps alone.

With more than 15,000 platforms in the broader marketing technology ecosystem, enterprise leaders face a basic problem: most Martech landscapes show what exists, not what is relevant. They place enterprise-grade platforms alongside tools designed for smaller teams, niche use cases, different business models, or less complex operating environments.

For enterprise consumer brands, that can make it difficult to understand which platforms should matter to them.

A platform may exist in the market, but that does not mean it can support the scale, governance, security, data complexity, integration requirements, and operational demands of a large B2C organization. Enterprise Martech decisions involve long implementation cycles, significant commercial commitments, cross-functional approval, and material risk if the wrong platform is selected—requirements some platforms cannot meet.

The purpose of the Enterprise Martech Landscape is to narrow the field.

We developed a landscape grounded in observed adoption across enterprise consumer brands. The objective is simple: identify the platforms that are showing up in real enterprise Martech stacks, and use that evidence to create a more focused view of the market for enterprise B2C technology leaders.

How to Read the Landscape

The Enterprise Martech Landscape is an evidence-informed navigation tool, not a universal ranking. It is based on analysis of 417 validated enterprise consumer-brand Martech stacks, all meeting the enterprise criteria used throughout this report: at least \$500 million in annual revenue and more than 1,000 employees.

The landscape is focused on owned media and direct digital marketing technologies, reflecting the scope of this research: owned media, customer engagement, lifecycle marketing, digital experience, content technology, customer data, and marketing operations.

Platforms are shown in the category in which they appeared in survey responses, so categorization reflects observed enterprise usage rather than vendor positioning alone.



Figure 49: Enterprise Martech Landscape for consumer brands, based on platforms identified in validated enterprise Martech stacks.

The value of the landscape is practical: it helps leaders identify platforms with demonstrated enterprise consumer adoption, establish more defensible vendor shortlists, understand category concentration, and reduce time spent evaluating tools unlikely to meet enterprise requirements.

The Enterprise-Relevant Market is Much Smaller Than the Martech Market

When the broader Martech market is filtered through observed enterprise consumer brand adoption, the relevant landscape becomes much smaller.

Within the owned media and direct digital marketing categories analyzed for this report, we identified 261 platforms appearing across the surveyed enterprise consumer brand stacks.

That number is still large, but it is far more navigable than the broader Martech ecosystem.

This is one of the core values of the landscape. Enterprise leaders do not need another reminder that the Martech market is enormous. They need a way to separate the market that exists from the market that is relevant to their operating environment.

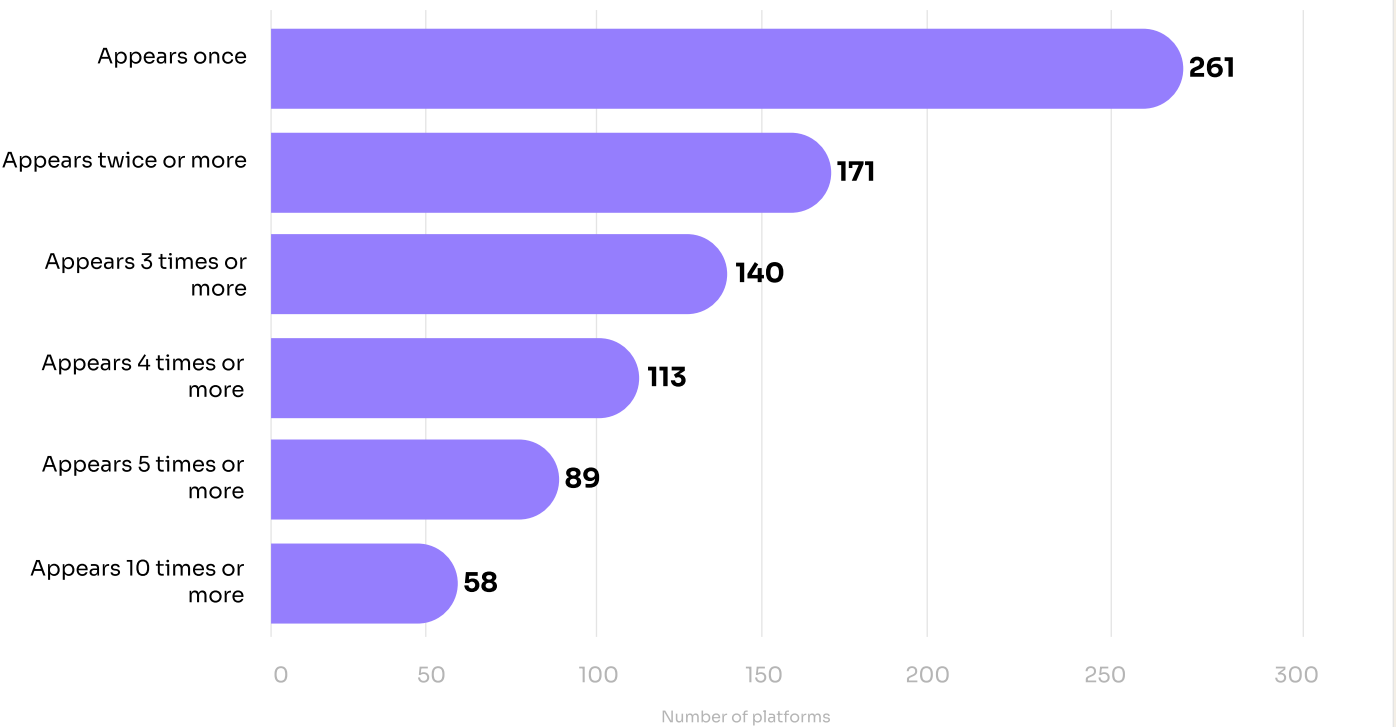
The landscape provides that filter.

Enterprise Adoption Follows a Power Law

Observed platform adoption across enterprise stacks is highly uneven.

Platform Penetration

Number of platforms appearing across validated enterprise consumer brand stacks, by minimum number of known enterprise brand users.



SOURCE: The Martech Weekly, Enterprise Martech Outlook Survey 2026 & TMW Intelligence Hub

Figure 50: Number of platforms appearing across enterprise consumer brand stacks at different adoption thresholds.

Only a subset of platforms appears across a meaningful number of enterprise stacks. Many platforms appear only once or twice.

This distribution reveals a familiar power-law pattern. A relatively small group of platforms captures broad enterprise adoption, while a long tail of specialist tools appears in a much smaller number of organizations.

Both parts of the market matter.

The concentrated core reflects the enterprise preference for proven platforms. Large organizations often favor technologies with mature security controls, established implementation ecosystems, strong integration

patterns, available talent, and enough market validation to survive procurement scrutiny.

The long tail reflects the opposite pressure: differentiation.

Enterprise consumer brands still need specialist tools to support unique customer journeys, local market requirements, channel-specific needs, data workflows, content operations, experimentation, loyalty, personalization, and emerging use cases. A completely standardized stack is rarely realistic.

The result is a two-layer market: a concentrated enterprise core surrounded by a fragmented specialist edge.



Enterprises are not necessarily risk-averse, but they do have enterprise requirements in scale, compliance, and perceived durability that probably disqualify most of the long tail of the landscape.

Scott Brinker, Founder & Analyst, chiefmartec



In this landscape, enterprises must explore all options. Innovations have surged in recent years, with most cases starting from emerging startups. I've seen enterprises that win by finding startups that bring a truly unique 'secret sauce' to the problem and connecting it to existing in-house processes. Compatibility and integration are keys in connecting startups to enterprise tech stacks.

Ben Craumer, Sr Product Manager, Content & Marketing at The Hershey Company

Using the Landscape Responsibly

The Enterprise Martech Landscape is intended to support decision-making, not replace it. A platform's presence in enterprise stacks provides useful evidence of relevance, but leaders still need to assess architecture, integration, governance, commercial model, implementation complexity, regional needs, internal capability and strategic fit.

Annual Updates

The Enterprise Martech Landscape will be updated annually as part of The Martech Weekly's ongoing research into enterprise Martech adoption.

The market changes quickly. Categories converge, vendors expand, platforms consolidate, new capabilities emerge, and enterprise adoption patterns shift over time. An annual update cadence allows the landscape to track how the enterprise-relevant Martech market evolves, rather than treating the ecosystem as a static map.

MARTECH MUST EARN THE RIGHT TO GROW



Enterprise Martech has spent years arguing for strategic importance. In 2026, that is no longer enough. Martech must prove that it creates value.

The most uncomfortable finding in this report is that 40.2% of enterprise Martech leaders cannot demonstrate a clear, measurable contribution to financial objectives or accepted proxies. That is not simply a measurement problem. It is a leadership problem.

The strongest Martech leaders behave like disciplined capital allocators. They establish a commercial thesis for each major investment, remove what no longer performs and direct resources towards what works.

Proof builds trust. Trust protects investment. Martech must earn the right to grow.



Juan Mendoza

Founder & CEO at The Martech Weekly

TECH CREATES POTENTIAL. DISCIPLINE CREATES VALUE.



No individual platform, architecture or AI capability creates advantage on its own.

Across the Cloud Data Platform, AI and decisioning, the same pattern appears. Data centrality matters only when governed customer context is usable. AI scales only when workflows, content and oversight are ready. Decisioning creates value only when it coordinates the experience around the customer rather than optimising isolated channels.

Architecture creates potential. Operating discipline converts it into performance. The Cloud Data Platform is central to this shift, but it does not replace the systems marketers use to execute. It provides a shared foundation for activation, measurement, AI and decisioning. The stack is not moving into the data platform; it is increasingly organising around it.

The omniscient Customer 360 is also giving way to the Contextual Customer View: assembling the right governed information for the next meaningful decision.

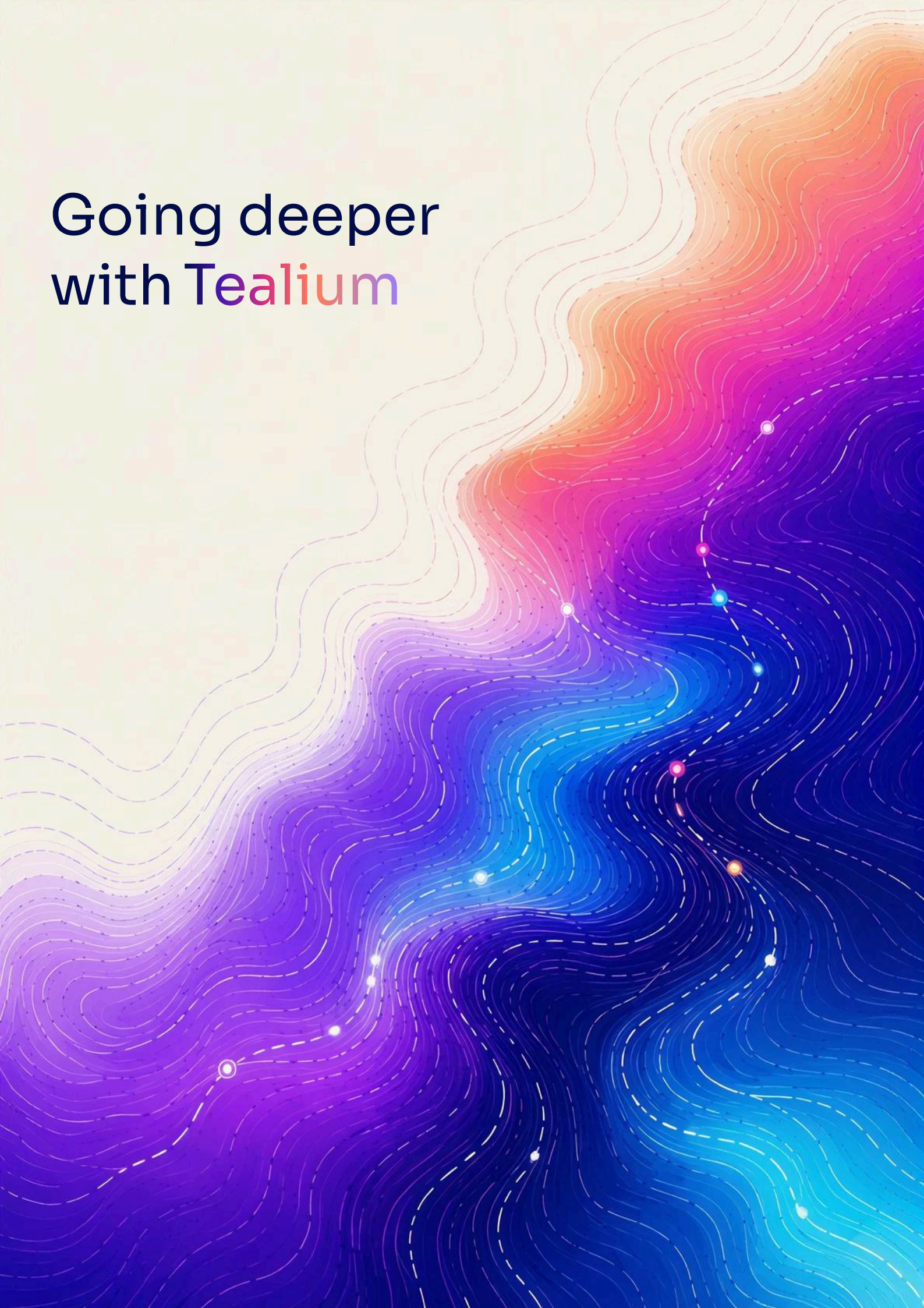
The Martech Advantage is the ability to make new capabilities useful, governable and measurable.



Keanu Taylor

Global Head of Research at The Martech Weekly

Going deeper with Tealium



Stop Collecting. Start Deciding.



Zack Wenthe

DIRECTOR OF PRODUCT MARKETING
& CUSTOMER DATA EVANGELIST
TEALIUM



Keanu Taylor

GLOBAL HEAD OF RESEARCH
THE MARTECH WEEKLY

KEANU

Let's start with a slightly contentious one, because it gets straight to the heart of the data challenge. What is the biggest misconception that enterprise leaders still have about customer data in 2026?

ZACK

You don't need all the data to be effective. There are still enterprises out there trying to collect data like they're Pokémon cards — they want them all, and that is the end goal. The reality is the value comes from using that data, activating that data, and influencing customer buying, whether that's on the education side, the conversion side, or the retention side. Using data to actually influence customer behavior — not how much more can I collect about the customer.

KEANU

So we're collecting data, not Pokémon — we don't need them all. One of the clearest findings in our research was about the centrality of the cloud data platform: it's becoming the center of gravity for enterprise Martech. Almost sixty percent of organizations said it was central or very central to their operations, rising to seventy-four percent among the highest-performing organizations. But we also found a gap. Putting data in one place doesn't automatically make it well-governed, accessible, or actionable. Once an enterprise has centralized its customer data, what needs to be true operationally before that data can be used reliably in real time across marketing, service, and other customer-facing decisions?

ZACK

Data centralization — the idea that the data warehouse is at the center — is a fact. Enterprises have been chasing this for decades, and finally cost, efficiency, and everything else lines up to make it work.

The problem is that center of gravity also has the ability to become a black hole very quickly, where everything gets dumped in and is lost to time. Just having data in one place, while a huge lift and improvement, may be enough for the broad organization. Finance and operations work with data on much longer time horizons — if they're looking at something four hours old, that's fine. But in a customer interaction you may have minutes or seconds to influence someone before they're gone.

A customer once told me they wanted to run an abandoned-cart campaign, but the reality was they had about three minutes. If a person left their app, in three to five minutes they were buying somewhere else. They weren't waiting an hour for a ten-percent coupon to decide what to have for lunch — they were gone. You have to understand your time horizons.

Stop Collecting. Start Deciding.

ZACK

Beyond that: what do you want to achieve, what do you want to influence, and what are the tools necessary to do that? Wiring email, text message, and every other channel directly to your data warehouse is exactly why CDPs existed in the first place. People were doing that before with on-prem servers, and eventually realized it wasn't working. I think we're back in that situation — just doing it faster now.

KEANU

Where do you see the gap? What is the most common reason organizations fall down here and don't get this right?

ZACK

It's less about technology and more about people and process. You have organizations that have bought all the right things, but teams that aren't talking to each other or aren't speaking the same language. The marketing team often doesn't even know what to ask for. If you have a data engineering team managing the data warehouse — all the tables, records, and fields — and marketing has no view into that to explore, form a hypothesis, and test it, then every action becomes a ticket to a data engineer. They run you a report, you look at it, it's not right, and the whole idea of exploration goes out the window. You end up with the minimum viable campaign because you don't have time to wait for rounds of iteration.

Breaking down the data silo matters, but so does breaking down the people silo — centers of excellence, regular meetings where teams talk about what's going on and how to improve. In over ten years of consulting, more times than I'd like to admit, when we'd kick off a project, people from different parts of the same organization were meeting each other for the first time. The engineering team had never been involved with the marketing or product team in that way. In large organizations that's going to happen, but knowing what the left hand is doing goes a long way in breaking down those challenges.

KEANU

You mentioned speed as one of the key drivers and big unlocks. Real-time activation relies on data being both available and trustworthy, but as decisions move closer to the moment there's a believed trade-off between latency and the amount of context you can carry into each decision. How have you seen marketers decide where to make that trade-off — when the customer decision needs maximum speed versus greater data fidelity and context?

ZACK

There are interactions where you know you need a lot of information. Someone walking into a jewelry store — you want to know everything they've purchased in the past, their preferences. But you also have a window of time because they've walked into the store; they're not going to get distracted and swipe away, so you can take a little more time to pull a full record. Compare that to someone sitting in their car for a few minutes — the moment context shifts, they've moved on.

Not all interactions or touch points are equal. The key is understanding what behavior you're trying to influence.

Stop Collecting. Start Deciding.

ZACK

There was a study on malls — specifically on how to get people to stay longer in the building, because longer dwell time meant more spending across all the stores. The question wasn't "how do I get them to buy the moment they walk in?" It was "how do I get them to keep walking, sit and have a drink, explore another corridor?" Signage became a big part of it: people are willing to go further when they know what's ahead. The principle for marketers is similar — don't go for the home run straight away. In this moment, what do I need to do to get them one click further?

I don't need the entire history of everything they've done. I just want to know what they've been looking at for the last ten minutes, because then I can use personalization and imagery to show them the next step. Once they click, maybe I show an offer — if I know this customer is price-sensitive, I drop a price-sensitive offer; if they're shipping-speed-sensitive, I address that instead. You engineer for the moment, then ask what data is necessary in that moment to guide the customer.

Our CTO says this all the time: if you're making recommendations based on movies someone watched ten years ago, they're not going to like what you're showing them — that was ten years ago. Even if all that historical data lets you build a better algorithm, in this moment you just need to show three things based on what they just watched. They start clicking in, and you build from there.

KEANU

That balance — finding the right amount of latency and context for each decision — is becoming even more important in the world of AI agents, where it's not just humans and rules engines determining what happens next. In our research, ninety-five percent of organizations have AI agents somewhere on their roadmap, but only just over ten percent of the use cases we observed were fully scaled in production. The ambition is there, but operationally we're not quite ready. Before AI agents can make or influence live customer decisions, what needs to be true about the customer data they can access — in terms of identity, consent, quality, freshness, and context?

ZACK

There is token-processing latency built in, so you already have to engineer as fast a response as possible — whether that is streaming or iterative responses — and then on top of that you have to layer in data about the customer. If I am waiting on an API call that takes a minute, the customer is done. They are already going to be frustrated.

So there is a speed requirement. It is funny, because we have talked about real time for a long time at Tealium. For a while it was very important, and then it drifted into this world where people said, "Well, for some things real time is super important, but for other things near time is good enough — and I am not sure I want to pay for it." People started making trade-offs when they were trying to rationalize spending and cost, even though real time is not actually that much more expensive. But the perception of it was.

And now all of a sudden we are back in a world where everyone says, "I get it now. I understand why we need to be able to serve this information up super fast, even if it is in smaller pockets." We have our context API, which does exactly that. It is an API that surfaces a defined set of attributes about a customer that an agent can immediately consume. That is important, but I also need two other things in there.

Stop Collecting. Start Deciding.

ZACK

I need trust — trust that the data is consented and accurate and ready for an agent to process. And I need accuracy, because a human can look at data and say, "Wait, that does not look right. Gmail is not spelled G-M-A-I-L-E." If you have programmed your LLMs correctly and you are using frontier models, they can probably catch a lot of that. But there is a pattern-recognition risk: many LLMs will take what you give them as fact and build a truth around it, whether or not it is correct.

That is the real risk, and I think it is why a lot of brands are still not operationalizing AI in a customer-facing way. They are still trying to figure out the mechanism for combining historical data, real-time data, and in-session data in a safe and coherent way.

And we know AI regulation is coming — in some capacity, whether that is federal, regional, or state level. There are a lot of trade organizations and a lot of people trying to work out how this plays out. So obviously there is a consent element to consider.

The last piece — and I think you and I touched on this in the prep call — is what do you do with the data if someone takes it back? I have the right to be forgotten. I have the right to refuse. I consented originally; now I do not. Do I have to un-train the model? How does that work? A lot of organizations are still trying to figure out how to maintain a base model and then layer context on top of it. That is exactly where real-time retrieval comes in, because you can layer that context on in the moment rather than baking it into or fine-tuning it into the model. You simply fetch what is available, consented, and accurate at the time — and that is all you send.

KEANU

In that scenario, the data foundation and the trust in that foundation become even more important. There is not much scope for getting it wrong when you are relying on it more heavily to make decisions and communicate with customers.

That leads naturally to a question around the actual coordination of decisions — whether that is AI-agent driven, rules-based, or a mix of both. One thing we found through the research is that what we call Martech Advantage organizations — the highest-performing customer-experience organizations — are much more likely to use real-time decisioning, cross-channel decisioning, and AI- or machine-learning-driven decisioning. But one finding was really striking: whole-business decisioning is still very rare, and most enterprises are still primarily optimizing within independent channels. So the question is: how should enterprises design the handoffs between customer data, decisioning, and activation platforms so that customers receive one coordinated journey and one coordinated experience? How do we get there when the organization is still working in silos?

ZACK

That is a perpetual problem. Years ago in consulting I did a lot of work with personalization, and even then the question was: how do we personalize in one channel if we are not personalizing in another?

I am encouraged by the results from the Advantage organizations and what they are doing, and yet I am not surprised by the other side of the findings — that we are still not orchestrating across the entire customer journey.

Stop Collecting. Start Deciding.

ZACK

Because ultimately most marketing organizations, especially on the B2C side, are organized by channel, and each channel has its own objectives and goals. What is good for email may not be good for SMS. If you are lucky and you have people who are experts in each of those channels and who actually talk to each other, that is when you start to unlock a lot of this. But what I find happening a lot is the inverse. Marketing teams are asked to do more with less. The same person may suddenly own email, SMS, and web personalization, and they are going to ask themselves, "What is my highest-revenue channel? Email? Okay, I will focus there." The other two become an afterthought.

So first you need to have an honest conversation: what do we actually need to do, and how do these channels tie together? But the long-term answer is you have to stop thinking about channels and objectives from a marketer's or business perspective and start thinking about it from the customer's perspective.

I know that it sounds almost clichéd, but think about the customer first. But genuinely, that is the world the Advantage brands are going to win in. The situation a customer is in is not isolated to your brand alone. They are not interacting only with you. Even if they are trying to buy only from you, they have things going on in their lives — family, work, everything else. The fact that they are not converting today on whatever offer you sent them does not mean the offer does not work, and it does not even mean the channel does not work. It might mean they had a storm last night, a tree fell in their front yard, and they are preoccupied. We cannot account for that, but we have to acknowledge that world exists.

Optimizing for channel efficiency while forgetting the customer is exactly why we end up in this place where nobody is thinking about the customer as a whole — because there is no incentive to do that. AI is going to change a lot of that, and that is the part that genuinely excites me, not just as someone enthusiastic about AI, but because it is going to force brands to understand that customers may not ever interact with them again in the traditional way.

I am not your source for research anymore. Customers can find the answer more efficiently and more effectively elsewhere. I told this story a while ago: my daughter is 21, and last summer her car was totaled, so we had to buy her a replacement. She wanted a 2023 Subaru — something a couple of years old that would last through college. We had all the criteria. Do you know how hard it is to find the different trim packages and what is included in a two- or three-year-old car? That information is not prominently on the manufacturer's website anymore. You might have to click six levels deep, or hope a dealership still has a listing, or dig through search results.

Or you can just open ChatGPT and say, "Tell me the different trim packages available and what the add-ons are for each one." And immediately — there it is.

All of a sudden I realized: I do not have to visit any of those sites. I do not have to browse through any of this. I do not have to get retargeted for any of those ads — because I am not buying this car. I am just trying to guide her in the right direction before she goes shopping. But now I am going to be seeing Subaru ads forever.

That is the kind of world brands are up against. The ones who build a genuine personal relationship — a connection that goes beyond a profile number, beyond a single channel — are the brands people will still go to first, rather than asking an AI, "What is a good pair of headphones?" There will always be people who say, "I know my headphone brand. I am just going to see what they have new." And I think we need to start optimizing for that world, rather than asking, "How do I make my channel one percent more efficient?"

Stop Collecting. Start Deciding.

KEANU

It is an interesting point about ownership. If you as a brand cannot deliver the right customer experience — one that is practical and usable, one that surfaces information the way your daughter needed when she was looking at trim levels — you are going to lose control of that experience. Customers have other options now, which is quite a frightening prospect for brands. Unless they can do significantly better, they will not control the customer experience.

ZACK

Offering a ten-percent-off coupon the moment someone lands on your page is not an incentive for them to build a relationship with your brand. Everybody gives ten percent off the first purchase. That playbook is going to disappear. We are going to move toward a much more human approach, one where the richness and fidelity of the data you hold allows you to paint a far more natural picture of each customer.

It allows you to automate the baseline interactions so that the moments of genuine human contact — a call-center conversation, a store visit — can be more personal. Your call-center agent does not have to stick rigidly to a script word for word if there is an AI alongside them saying, "Here is that resource — now you can share it." A customer walks into a store and your salespeople do not have to know every product detail if they have the answer at their fingertips; they can still have a real conversation.

I honestly do not know exactly what this will look like in a year. If we had tried to predict last year how AI would play out, we would probably all have been wrong. I do truly believe AI will have an enormous impact. But I also believe the human element of marketing — the messaging, the tone, the video, all the things that are distinctly human — is going to have just as big an impact. That is the other side of the equation.

Brands need to make the investment so they can free up their people to get creative, to come up with new ideas, to find new ways to talk to customers — as opposed to buying technology simply to squeeze every last dollar out of every interaction. I think that is a losing investment.

KEANU

We've talked about the human side. I want to turn to the technical side for a bit. Cloud data platforms have become more central in the stack, and there is more overlap now between what the cloud data platform, the CDP, and specialist activation tools at the far end of the chain can technically do. Where do you see each link in that chain as being primarily responsible for certain parts of how we activate data? Where are you seeing the dividing lines?

ZACK

A lot of people are saying, "Hey, this squeeze is a bad thing — engagement platforms squeezing this way, CDPs bouncing around in the middle." I don't think it's a bad thing. I think it's a good thing, and the reason it's happening is that there is no one-size-fits-all enterprise, no one-size-fits-all organization, and no one-size-fits-all architecture stack.

Stop Collecting. Start Deciding.

ZACK

Years ago we had content management systems, then they became DXPs, then composable popped up — headless, composable, all of it — and then people realized: that sounds good on paper, but it's really hard to execute. The same thing has happened in CDPs. We had platforms that filled a gap, and then someone said, "What if I don't need that whole gap filled? What if I only need part of it?" And then composable entered the picture: we'll sell you only the pieces you need. Then you realize you still have to wire it all together. That can work for organizations that are ready for it — and there are a lot of them. Many of our customers don't use every piece of Tealium; they buy what they need, and we're deeply embedded that way.

But I think there are two things at play. First, acknowledge there is no golden stack. I'll make a prediction: within a year I think we'll start hearing a phrase like "composable data cloud," because I don't want all compute happening in a single location. I want AI inference to happen here, storage and querying there, maybe a faster cache somewhere else. Right now that's not purely a Snowflake thing, a Databricks thing, or a BigQuery thing — they each have their strengths. So what if you wanted to use all of them? We're back to: there is no single right answer.

You have to understand what your organization is capable of doing. Are you a build organization or a buy organization? That alone will determine a lot on the technology side. Are you a large, broad team that needs extensive governance, with multiple brands spread across the globe? Or are you a primarily direct-to-consumer operation with a Shopify front end and a four-person marketing team? That is a very different situation from a Fortune 50 company with marketing teams numbering in the hundreds of thousands. No golden architecture. Build for the outcome you are trying to achieve and the goals you are trying to reach — way before anything else.

The second factor is flexibility. Every platform has an incentive to hold more of your data, charge you more, and increase their control. But that incentive for them becomes a risk for you: the more you are locked into any single platform, single data warehouse, or single engagement platform, the more they can raise your rates and impact your operations. So if there is no right answer, the question becomes: what do I want to achieve, and what is the most flexible path that allows me to change my mind in a year when the world changes again? Being able to swap pieces in and out is essential.

Tealium has been around for a long time and we've seen a lot of shifts — web analytics, mobile apps, and everything since. We keep coming back to: what do you want to accomplish? Let's build something that does that. That is more exciting to me than trying to become the next behemoth. We've all seen the monoliths and how well that works. I'm not bullish on the monolith idea.

KEANU

You kept coming back to what we are trying to achieve, and I really love that view — that technology exists not for its own sake but to help the organization reach its objectives. One of the most sobering findings in the report was that 40.2 percent of enterprise Martech leaders cannot demonstrate a clear and measurable contribution to either financial objectives or accepted financial proxies.

So my final question, Zack: how should enterprise leaders prove the business value of customer data infrastructure when its impact is distributed across acquisition, retention, service, customer experience, and operations? How do the most sophisticated organizations prove the value of their Martech?

Stop Collecting. Start Deciding.

ZACK

The number one thing to start with is a benchmark. When you kick off these projects and make these investments, document what you are doing now. Because in six months, when the project is live, you can look at the result. So many tech projects produce soft outcomes: it made the team's work easier, it sped this up, we went from three weeks per campaign to two weeks and can now do twice as many. How do you quantify that?

You can't always quantify it directly, but you can say: our average campaign generates, say, a round number of one million dollars in revenue. If we were running 26 campaigns a year previously and now, with all these new tools, we are running 40 — even if each one is generating only \$900,000 because we're somewhat saturating our market — that is still a massive revenue gain with a clear tie-back.

With that said, I would challenge any organization: in my opinion, you can find one payoff use case — one use case that pays for the entire platform. We were on stage with WGU, one of our customers, at a recent event. That is exactly what they did. They looked at ad suppression. The time it was taking them to go from a trigger event through batch processing and out to their ad networks to suppress an audience was a day, three days, sometimes a week. At large scale, that is an enormous amount of wasted ad spend.

I just spoke today with another customer about an event we are doing with them later this year. They had one use case where they were suppressing an offer — but when it went to the wrong people, people already in-process, they would often have to honor it anyway, which cost them margin. They were essentially giving money away by showing that offer to everyone. Simply segmenting and personalizing so the offer reached only the right person was worth millions of dollars in revenue capture. That more than pays for the entire platform. Every other use case becomes a bonus.

So find the ones that are obvious. Pick targeted use cases. Where are we spending, and are we now spending less? Tie them back. Break the big ones down into smaller, measurable pieces: we increased output, we maintained or grew our average revenue per campaign or average order size even though we are doing more. You can start to model that out in a way that resonates with your financial organization.

And the last thing I would say: take the time to actually do it. That is the piece everyone skips. People get caught up in the excitement of launching a new campaign or in all the technology or all the problems, and they never complete the process — the benchmarking, the clear definition of outcomes. You cannot just say "more revenue." What part of revenue? Do you need more people on your landing page? More conversions from that page? An increase in average order value from the first purchase? Those are the things that matter, because they are what makes a business say: no matter what else is happening, we are not getting rid of this technology, because it solves this one very valuable problem. Everything else is a bonus.

KEANU

Zack, thank you for helping us make the distinction between centralizing customer data and actually making it useful in live decisions. The important takeaway — at least what I took away from this conversation — is that customer data only creates value when it is trustworthy: when it sits on solid identity, consent, governance, and ownership, and when leaders can make the connection between the data infrastructure and the outcomes the business cares about. Zack, thank you again for joining us, and a massive thank you to Tealium for partnering with us as Title sponsor of the Enterprise Martech Outlook for 2026.

