

THE YEAR AI STOPPED BEING A FEATURE

How 2025 Rewrote the MarTech Playbook

"You have to get your data right to get your AI right. Without clean, connected, trusted data, there is no intelligence, only hallucination."

Marc Benioff, Salesforce CEO, November 2025

Executive Summary

The MarTech landscape in 2025 underwent its most significant transformation since the sector's emergence, driven by five structural forces that fundamentally redefined how marketing technology is built, bought, and deployed. This was not a year of incremental change but of categorical shifts in market architecture.

The Bottom Line: AI moved from feature to foundation. Third-party cookies survived against all expectations. Platform consolidation accelerated while paradoxically, custom-built solutions resurged. Data infrastructure became the new battleground, with \$8+ billion spent on data management acquisitions. Privacy regulations shifted from compliance burden to competitive advantage.

Strategic Implications for 2026:

For CMOs

The "AI-native stack" is no longer optional. Winners in 2026 will be those who treated 2025 as a transition year to rebuild core capabilities around agentic AI, first-party data, and composable architectures.

For CIOs

Data infrastructure investments now determine marketing velocity. The Salesforce-Informatica merger signals that marketing technology is fundamentally a data infrastructure problem.

For Growth Leaders

The cookie reprieve created a dangerous false sense of security. Organizations that delayed first-party data strategies will face material disadvantage as user opt-out rates climb toward 66-90%.



PART I: Structural Shifts

SHIFT#1: AI-Native Architecture Became Table Stakes

Marketing technology shifted from "AI-enhanced" to "AI-first" architectures, where artificial intelligence is embedded at the platform level rather than bolted on as features. Agentic AI systems that can reason, decide, and act autonomously have moved from experimental to operational.

Drivers:

- Generative AI maturity enabled production-ready autonomous agents
- Customer expectations for real-time, hyper-personalized experiences exceeded human capacity
- Economic pressure to do more with smaller teams accelerated AI adoption necessity
- Platform vendors racing to avoid commoditization invested heavily in proprietary AI layers

Signal Events:

- Salesforce Agentforce platform closed 8,000+ deals (4,000 paid) since September launch
- HubSpot launched 200+ AI features across Spring and Fall 2025 Spotlights, including autonomous Customer Agent resolving 50%+ of support tickets
- Adobe introduced Agent Orchestrator as foundational layer for Experience Platform
- 68.6% of organizations now use generative AI tools (up from negligible 2 years prior)
- MarTech landscape grew to 15,384 solutions with significant AI-native share

35%

**AI Content Tools
Growth**

AI content and sales tools saw 35% and 47% growth rates respectively

50%

**Support Ticket
Resolution**

HubSpot customers using Customer Agent spend 40% less time closing tickets

\$1B

**Salesforce Data
Cloud+AI ARR**

Annual recurring revenue surpassed \$1 billion, growing 120%+ YoY

98%

**Mid-Market Belief
in AI**

98% of mid-market companies believe AI will improve marketing effectiveness (though only 33% use it widely)

Implications for Next 12-36 Months:

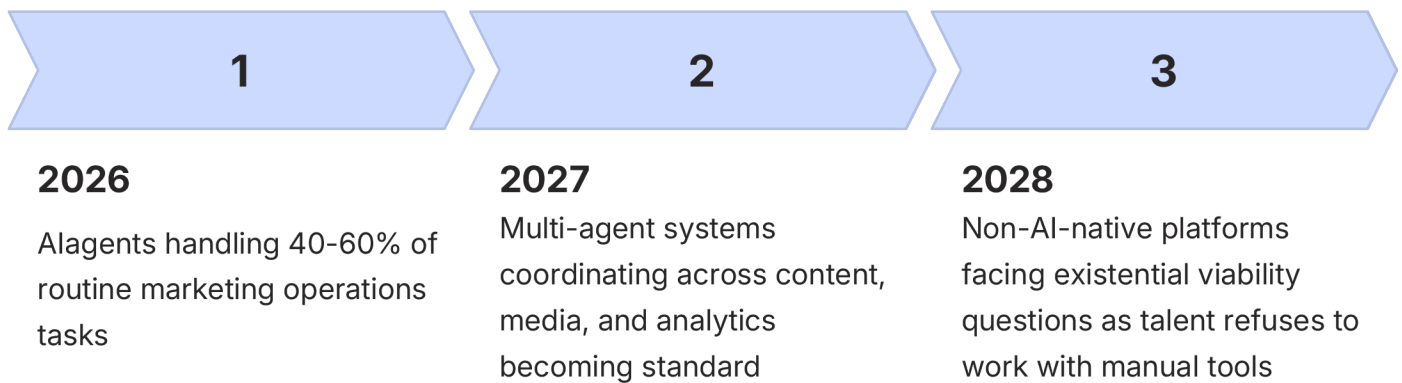
For CMOs:

- Budget reallocation required: AI agent orchestration platforms will become mandatory infrastructure, not optional tools
- Role transformation: Marketing organizations need "AI model operations" roles and prompt engineering expertise
- Workflow redesign: Traditional campaign planning cycles incompatible with AI-driven real-time optimization

For Vendors:

- Innovator's dilemma materializing: Established players rushing to retrofit AI while startups build AI-first from scratch
- Talent war is intensifying for AI/ML engineering capabilities
- Partnership vs. build calculus shifting as foundational models commoditize

Expected Trajectory (2026-2028):



SHIFT #2: Cookie Reprieve Created False Security First-Party Identity Became Existential

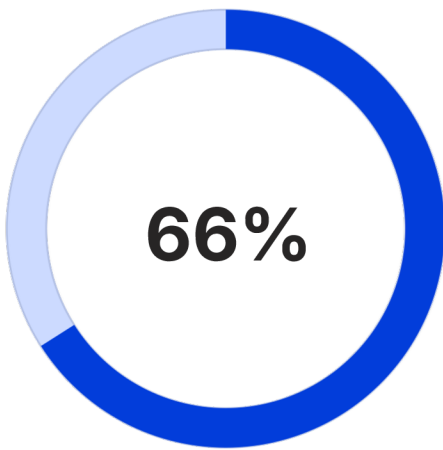
Google's April 2025 reversal on third-party cookie deprecation provided temporary relief but accelerated the strategic imperative for first-party data infrastructure as user choice mechanisms and regulatory pressure created functionally cookieless environments.

Drivers:

- Google announced April 22, 2025 it would NOT introduce standalone cookie prompt; cookies remain by default
- Regulatory pressure (UK CMA investigation) forced Google's hand
- Industry resistance from advertisers, publishers, and ad-tech ecosystem
- However: Safari, Firefox already blocking; user opt-out expected at 66-90% when presented with choice
- Privacy regulations (GDPR, CCPA/CPRA) made consent-based marketing mandatory regardless of browser policy

Signal Events:

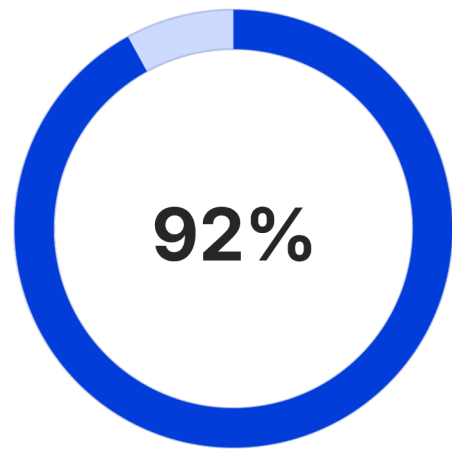
- April 22, 2025: Google cancels cookie deprecation prompt, maintains current approach
- Agency M&A focused on data assets: WPP acquired InfoSum (data clean room), Publicis acquired Lotame
- Six CDP acquisitions in first half of 2025 alone
- California Privacy Protection Agency ended 30-day cure period December 31, 2024 violations now yield immediate penalties
- GDPR enforcement: ~1.2 billion in fines issued in 2024, cumulative ~5.88 billion since 2018



66%

Predicted User Opt-Out Rates

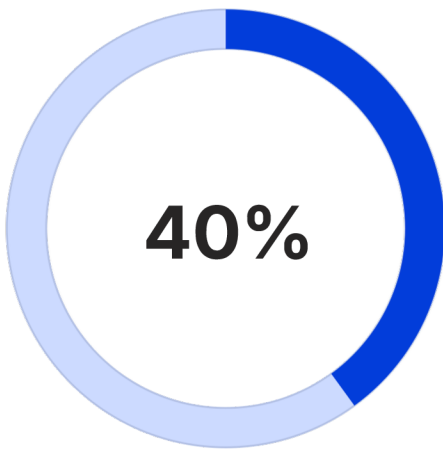
Expected user opt-out rates: 66-90% (mirroring Apple ATT's ~70% rejection rate)



92%

First-Party Data Recognition

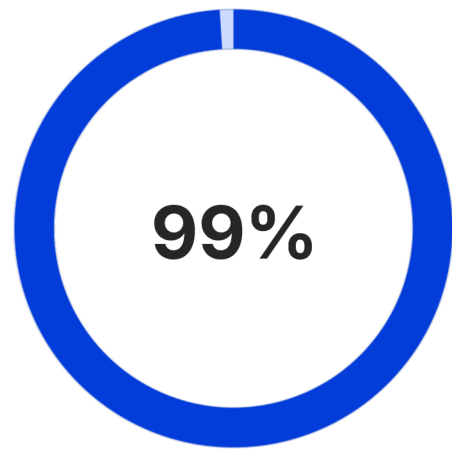
First-party data recognition rate: 92% vs. 65% for third-party data



40%

Current Cookie Refusal

40% of users already refuse cookies (CNIL report)



99%

Privacy Impact on Personalization

99% of marketing managers say privacy concerns have impacted advanced personalization plans

Implications for Next 12-36 Months:

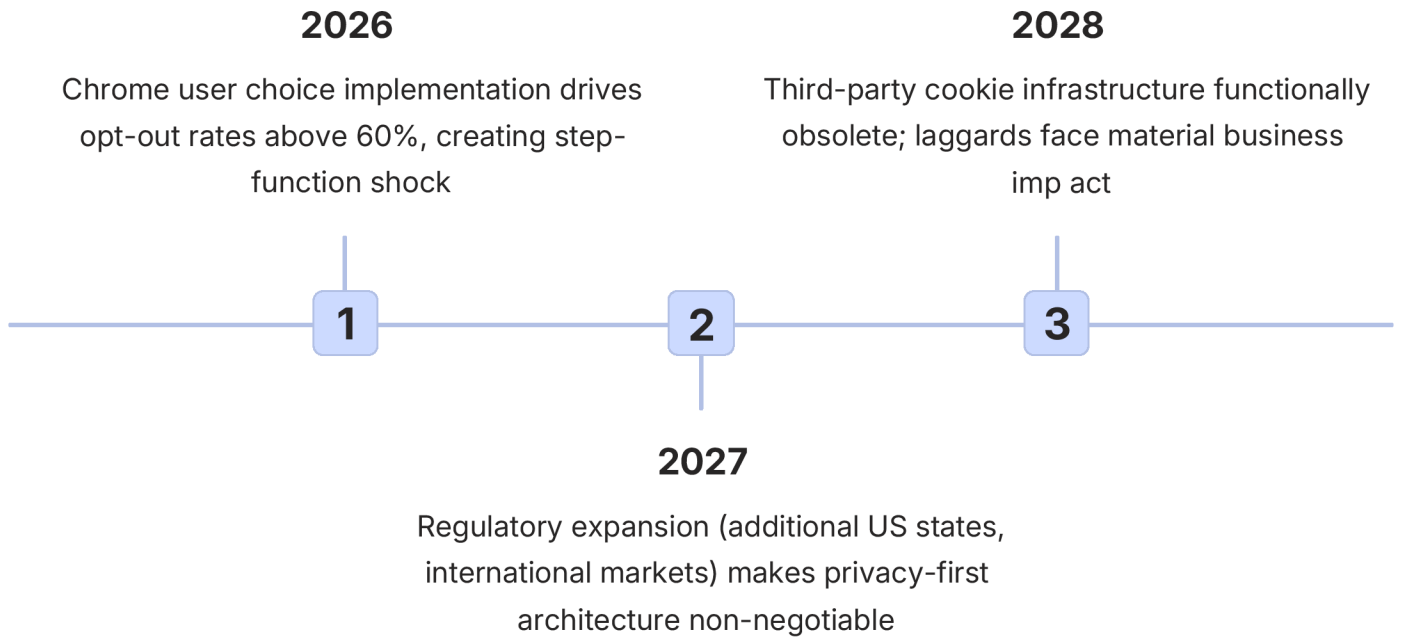
For CMOs:

- Chrome becomes "functionally cookieless" despite technical availability as opt-out rates climb
- Value exchange strategies mandatory: Give customers compelling reasons to share data willingly (zero-party data)
- Attribution modeling must shift to probabilistic/modeled approaches
- First-party data collection infrastructure becomes a core competency

For Vendors:

- CDP vendors pivoting from standalone products to embedded platform features (see 6 acquisitions H1 2025)
- Clean room technology is experiencing renewed investment as a collaboration mechanism
- Identity resolution vendors face a make-or-break moment as deterministic matching declines

Expected Trajectory (2026-2028):



SHIFT #3: Full-Stack Consolidation Accelerated Data Infrastructure as the Prize

Platform vendors aggressively acquired and integrated across the MarTech stack, with particular focus on data management, governance, and integration capabilities. The strategic calculus shifted from "best-of-breed vs. suite" to "who owns the unified data layer."

Drivers:

- AI agent effectiveness depends entirely on comprehensive, clean, contextualized data
- Enterprises are tired of maintaining 20-80 point solutions with fragile integrations
- Mid-market buyers are gravitating toward integrated platforms to reduce operational complexity
- Margin pressure is forcing vendors to cross-sell and increase customer lifetime value
- Data governance, privacy compliance, and security are easier to manage in unified environments

Signal Events:

- **Salesforce acquired Informatica for \$8 billion (May 2025, closed November 2025)**, the largest pure MarTech infrastructure deal of the year
- Publicis Groupe: top buyer in H1 2025 with 6 deals
- Stagwell: 5 deals in H1 2025
- M&A activity up 118% year-over-year
- First half 2025: 40 acquisitions (down from peaks but strategic focus shifted to quality over quantity). Six CDP companies acquired in H1 2025: Informatica (\$8B by Salesforce), mParticle (\$300M by Rakt), Lytics (by ContentStack), Coho AI (by Yotpo), plus two others



\$8 Billion Deal

Salesforce-Informatica: \$8 billion all-cash; expected 7% ROI, signaling infrastructure over growth deal



Stack Growth

Average techstack grew 2.2% in 2025 despite consolidation pressures



More Tools

62.1% of organizations use more tools than two years ago (AI expansion offsetting consolidation)



Custom Platforms

B2B companies: 10% now cite "Other" (custom platforms) as stack center, up from 2% in 2024 (5X increase)

Implications for Next 12-36 Months:

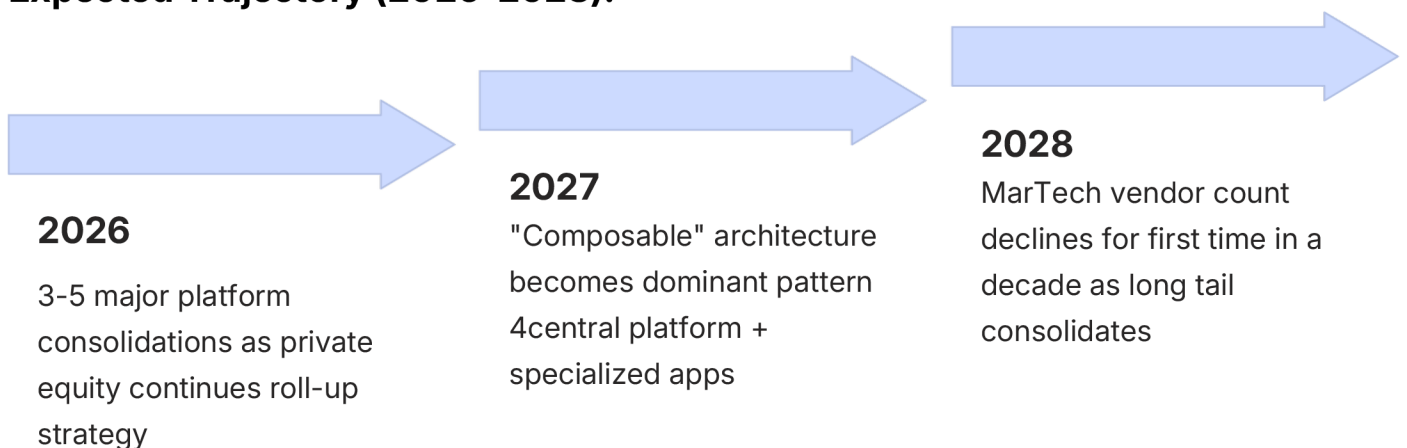
For CMOs:

- Vendor selection increasingly about ecosystem lock-in vs. flexibility tradeoff
- "Best-of-breed" strategies require enterprise-grade integration/iPaaS capabilities
- Total cost of ownership calculations must include data engineering overhead
- Expect pricing pressure from vendors consolidate market share

For Vendors:

- Mid-tier players face "scale or be acquired" moment
- Integration partnerships with major platforms become survival requirement
- Data interoperability standards (composable CDP architectures) emerging as competitive necessity

Expected Trajectory (2026-2028):



SHIFT #4: Creative, Media, and Analytics Converged Into Unified Workflows

Generative AI collapsed traditional boundaries between creative production, media execution, and performance analytics, forcing reorganization of agency models, marketing operations, and platform architectures.

Drivers:

- Generative AI enables real-time creative production at scale AI-powered creative optimization requires tight integration between asset generation and performance data
- Personalization moved from "segment-level" to "individual-level," requiring dynamic creative assembly
- Campaign velocity expectations compressed from weeks to hours Economic pressure to reduce agency spend and production costs

Signal Events:

- HubSpot launched Loop Marketing framework⁴ replacing traditional funnel with continuous AI-driven optimization cycle (Express³ Tailor³ Amplify³ Evolve)
- Adobe introduced Unified Customer Graph Engine (November 2025)⁴ 45% faster campaign activation
- Content and sales tool categories saw 35% and 47% growth respectively (highest in MarTech landscape)
- AI-powered content creation tools now used by 68.6% of organizations
- Marketing Studio launched by HubSpot as Figma/Miro competitor for campaign collaboration



Faster Campaign Activation

Early adopters report 45% faster activation of personalized campaigns (Adobe Experience Platform)



Content Tools Growth

Generative AI content tools experienced 35% category growth rate



35%

Growth Rate

Generative AI content tools experienced 35% category growth rate



46%

AI for Decisioning

46% of organizations using or planning AI for decisioning (up significantly YoY)



60%

Cost Reduction

Google Display & Video 360 reported 60% cost reduction with AI-enhanced automation (January 2025)

Implications for Next 12-36 Months:

For CMOs:

- Traditional agency relationships under pressure; in-house teams with AI tools becoming viable alternative
- Marketing operations roles evolving: less project management, more prompt engineering and AI orchestration
- Creative testing velocity increases 10-100X, requiring new governance and brand safety frameworks
- Attribution becomes real-time closed-loop as creative-media-analytics integrate

For Vendors:

- DAM, creative tools, media platforms, and analytics must integrate or die
- Agency holding companies acquiring data/tech capabilities to protect margins (WPP/InfoSum, Publicis/Lotame)
- New category emerging: "creative intelligence platforms" combining generation + optimization

Expected Trajectory (2026-2028):



2026

50% of paid media creative generated and optimized by AI with human oversight



2027

Traditional "campaign launch" model obsolete; continuous creative evolution becomes standard



2028

Agency model bifurcates into strategic partners vs. execution-as-a-service

SHIFT #5: Marketing Engineering Emerged As Distinct Discipline

The proliferation of AI tools, custom automation, and composable architectures created demand for a new role combining marketing strategy, data engineering, and software development the "marketing engineer."

Drivers:

- AI tools lowered barrier to building custom marketing software
- No-code/low-code platforms enabled marketers to build without traditional IT dependency
- Complexity of modern stacks (15,384 solutions, average stack of 20-80 tools) requires technical expertise
- Homegrown martech resurged as AI made custom development economically viable
- Composable architecture patterns require technical architecture skills within marketing

Signal Events:

- Homegrown martech solutions: 24% of respondents planning to add in next 12 months (up from ~10% previously)
- Custom-built platforms cited as stack center jumped from 2% to 10% (5X increase, B2B segment)
- State of Stack 2025 survey: 62.1% using more tools than two years ago despite consolidation efforts
- HubSpot's Breeze Studio launched for building custom AI agents and assistants
- Data Studio (HubSpot) enables non-technical users to blend data from multiple sources

1

Custom Platform Adoption

B2B custom platform adoption: 10% of organizations (up from 2% in 2024)

2

Generative AI Usage

Generative AI tools used by 68.6% of organizations (primarily for building custom automations)

3

Tool Category Growth

AI content tools grew 35%, sales tools 47% indicating build vs. buy shift

4

Technical Skills Demand

Marketing teams citing need for "technical architecture" skills up significantly

Implications for Next 12-36 Months:

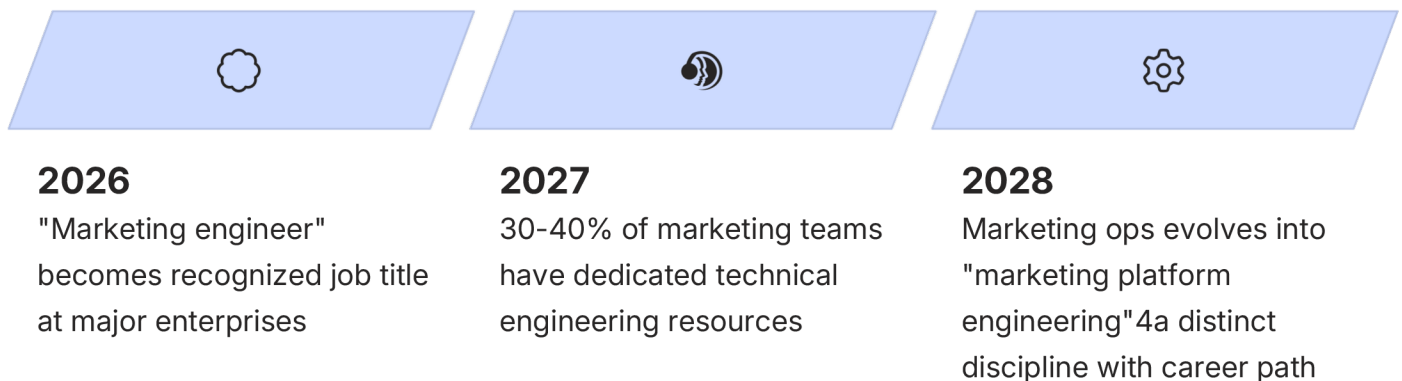
For CMOs:

- Talent strategy must include technical recruiting: data engineers, full-stack developers, AI specialists
- "Marketing technologist" title is evolving to "marketing engineer" with software development expectations
- Budget shifts from agency services to technical talent and infrastructure
- Organizational design challenge: where does marketing engineering sit? Marketing vs. IT vs. new function?

For Vendors:

- Platform extensibility and developer experience become primary competitive factors
- Marketplace ecosystems (HubSpot, Salesforce, Shopify) see AI app integration explosion
- Documentation, APIs, and SDKs as important as UI/UX for platform selection

Expected Trajectory (2026-2028):






PART II: Key Stories

10-15 Micro-Level Events

The following section details the specific events, product launches, acquisitions, and market movements that defined 2025's MarTech transformation. Each story represents a critical inflection point that either validated or accelerated the five structural shifts outlined above.

These micro-level events provide the concrete evidence behind the macro trends, showing how strategic decisions by major platforms, regulatory actions, and market dynamics combined to reshape the industry landscape.



STORY #1: Salesforce Acquires Informatica \$8 Billion Deal

Salesforce acquired Informatica, a leader in enterprise AI-powered cloud data management, for approximately \$8 billion in equity value (net of existing investment). The deal brings Informatica's data catalog, integration, governance, metadata management, and Master Data Management (MDM) capabilities into Salesforce's platform. Shareholders received \$25 cash per share, representing a 30% premium. The acquisition closed ahead of schedule in November 2025.

Why It Mattered:

- Largest pure MarTech infrastructure acquisition of 2025, signaling that marketing technology is fundamentally a data problem
- Addresses Salesforce's historical weakness in back-end data management; prior acquisitions (Tableau, MuleSoft, Slack) left data layer fragmented
- Directly enables Agentforce (Salesforce's AI agent platform) to operate on trusted, governed, enterprise-wide data
- Validates thesis that AI effectiveness depends on comprehensive data infrastructure
- Strategic vs. financial deal (7% expected ROI vs. typical high-growth acquisition profiles)

Structural Shifts Supported:

Shift#1: AI-Native Architecture

AI agents require comprehensive data context to operate effectively; Informatica provides enterprise-wide metadata and governance

Shift #3: Full-Stack Consolidation

Largest consolidation move of 2025; platform vendors acquiring infrastructure rather than features

Evidence:

- Deal value: \$8 billion all-cash
- Salesforce expects accretion on non-GAAP operating margin, EPS, and free cash flow starting year 2 post-close
- Informatica works with 5,000+ customers across 100+ countries
- Integration enhances Agentforce, Data Cloud, Tableau, MuleSoft, and Customer 360
- Salesforce-Informatica combined metadata creates "ultimate AI-data platform"

STORY #2: Google Reverses Cookie Deprecation Indefinite Reprieve

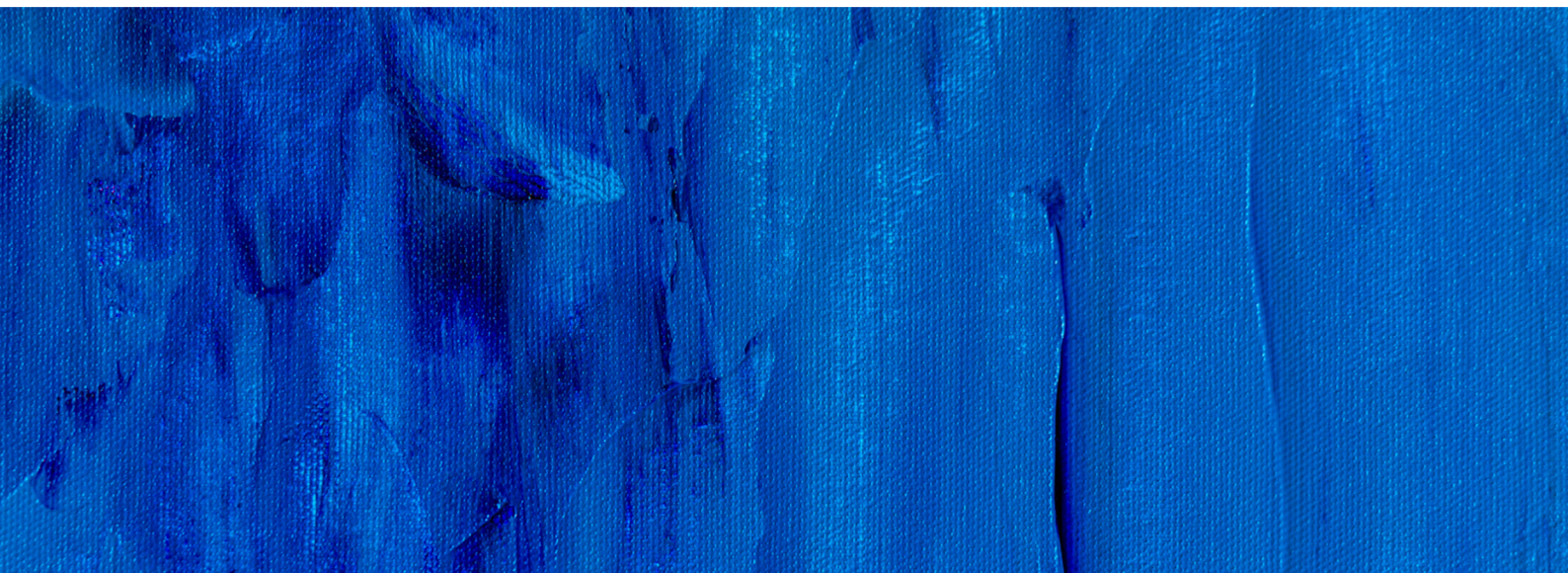
Google announced it will NOT introduce a standalone prompt for third-party cookie choice in Chrome and will maintain the current approach indefinitely. This reverses five years of planned cookie deprecation (originally announced in 2020, repeatedly delayed). Instead of forcing deprecation, Google will continue allowing users to manage cookie preferences through existing Chrome settings. Privacy Sandbox initiatives continue, but in diminished form.

Why It Mattered:

- Ended industry-wide "cookie-pocalypse" preparation that consumed billions in development resources
- Created false sense of security; functionally cookieless environment still emerging as opt-out rates climb
- Validated concerns that Google's Privacy Sandbox gave company unfair competitive advantage (UK CMA investigation)
- Shifted strategic focus from "cookie alternatives" to "user choice mechanisms" with a similar outcome (low consent) via a different path
- Agencies and brands spent years preparing for deprecation; now face strategic uncertainty about whether investments were wasted

Evidence:

- Google statement: "We've decided to maintain our current approach to offering users third-party cookie choice in Chrome."
- Historical timeline: 2020 announcement ³ 2023 delay ³ 2024 delay ³ 2024 "user choice" pivot 2025 "no prompt" reversal UK Competition and Markets Authority (CMA) investigation ongoing
- Expected opt-out rates: 66-90% (industry analysis citing Apple ATT precedent)
- IP Protection for Chrome Incognito is still rolling out in Q3 2025, showing continued privacy initiatives



STORY #3: M&A Surge

118% Increase Year-Over-Year

MarTech M&A activity surged 118% year-over-year in 2025, with particular focus on data infrastructure, CDP platforms, and AI capabilities. First half saw 40 acquisitions (down from 74 in Q1 2022 but up dramatically from 2024). Publicis Groupe led with 6 deals, Stagwell with 5, and Advent International/Bridgepoint with 4 each. Notable pattern: agencies acquiring data collaboration platforms (WPP/InfoSum, Publicis/Lotame).

Why It Mattered:

- Signals consolidation phase after years of MarTech proliferation (15,384 solutions, but long tail consolidating)
- Strategic shift from growth acquisitions to capability acquisitions (data, AI, infrastructure)
- Validates "own the data layer" thesis as winning strategy
- Agency holding companies moving upstream into data/tech to protect margins and control value chain
- Six CDP acquisitions in H1 alone indicates category convergence (standalone CDP model struggling)



118% YoY Growth

M&A activity up 118% year-over-year, signaling market maturation and consolidation phase



TopAcquirers

H1 2025 acquirers: Publicis (6), Stagwell (5), Advent International (4), Bridgepoint (4)



CDP Focus

Six CDP companies acquired in H1: Informatica, mParticle (\$300M), Lytics, Coho AI, two others

Structural Shifts Supported:

Shift #3: Full-Stack Consolidation

Dramatic increase shows market entering mature consolidation phase

Shift #2: First-Party Identity

Agency focus on data collaboration platforms (InfoSum, Lotame) driven by cookie challenges

Evidence:

- M&A activity up 118% YoY
- H1 2025 acquirers: Publicis (6), Stagwell (5), Advent International (4), Bridgepoint (4)
- Six CDP companies acquired in H1: Informatica, mParticle (\$300M), Lytics, Coho AI, two others
- WPP acquired InfoSum (data clean room vendor)
- Publicis acquired Lotame (data collaboration platform)
- Ziff Davis acquired Semantic Labs (Q3 2025)

STORY #4: HubSpot's 200+ Feature Launch

AI-First Platform Transformation

HubSpot launched over 200 features across two major product Spotlight events in 2025, representing its most significant platform evolution since founding. Key launches included: Breeze AI agents (Customer Agent, Prospecting Agent), Data Hub (replacing Operations Hub), Loop Marketing framework, AI-powered CPQ, Breeze Marketplace and Studio for custom agents, and unified Smart CRM. Customer Agent achieves 50%+ support ticket resolution autonomously.

Why It Mattered:

- Demonstrates velocity required for incumbents to compete in AI era (200+ features in one year)
- Validates "AI embedded everywhere" strategy vs. standalone AI products
- Shifts SMB and mid-market away from best-of-breed toward integrated platforms with native AI
- Data Hub repositioning signals infrastructure becoming primary competitive battleground
- Loop Marketing framework attempts to redefine marketing methodology around continuous AI optimization

Structural Shifts Supported:

Shift #1: AI-Native Architecture Comprehensive AI integration across entire platform, not bolt-on features	Shift #4: Creative and Media Converge Loop framework collapses traditional funnel stages	Shift #5: Marketing Engineering Breeze Studio enables marketers to build custom agents
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Customer Agent Resolution

Features Launched

200+ features launched across Spring and Fall 2025 Spotlights

Evidence:

- 200+ features launched across Spring and Fall 2025 Spotlights Customer
- Agent: 50%+ ticket resolution, 40% reduction in time to close tickets 8,000+
- Agentforce-equivalent deals (HubSpot's competitive positioning)
- Data Hub enables non-technical users to blend data from multiple sources using AI Breeze Marketplace for discovering and installing AI agents

STORY #5: MarTech Landscape Reaches 15,384 Solutions

9% Growth Amid Consolidation

Scott Brinker's annual MarTech landscape super graphic documented 15,384 solutions (up 9% from 2024), continuing multi-year growth trend despite consolidation pressures. Notably, AI-native tools represent significant share of new entrants. Content tools grew 35%, sales tools 47%. Paradoxically, homegrown/custom martech resurging (24% planning to add), and "hypertail" of billions of AI-generated micro-applications emerging.

Why It Mattered:

- Defies consolidation narrative; market still rapidly expanding despite M&A surge
- AI lowers barrier to entry, enabling new wave of specialized point solutions
- "Hypertail" concept introduces infinite long-tail as AI assistants generate custom software on-demand
- Validates that platform consolidation and tool proliferation can coexist
- Average stack grew 2.2% despite enterprises attempting to consolidate

Structural Shifts Supported:

Shift #1: AI-Native Architecture

Significant share of 15,384 are AI-native tools

Shift #5: Marketing Engineering

Custom/homegrown resurged driven by AI-enabled development

15,384 35%

Total Solutions

15,384 total solutions
(9% growth from
~14,100 in 2024)

Content Tools Growth

Content tools: 35%
growth; Sales tools:
47% growth

2.2% 24%

Stack Size Increase

Average stack size
increased 2.2% in 2025

Homegrown Plans

24% planning to add
homegrown martech in
next 12 months

"The 'hypertail' concept introduces billions of AI-generated programs (ChatGPT, Claude, Gemini creating software invisibly) that exist beyond traditional vendor counts."

STORY #6: Privacy Enforcement Intensifies

-1.2B GDPR Fines in 2024

GDPR enforcement reached -5.88 billion cumulative since 2018, with -1.2 billion issued in 2024 alone, indicating acceleration. Regulators expanded focus beyond Big Tech to ordinary businesses. California Privacy Protection Agency ended the 30-day cure period on December 31, 2024, making violations immediately punishable. January 2025 brought inflation-adjusted CCPA fines. March 2025 "investigative sweep" targeted geolocation data collection.

Why It Mattered:

- Shifted privacy from "Big Tech problem" to "every business problem"
- Removal of cure period makes compliance errors immediately costly (\$7,500 per intentional violation)
- Demonstrates regulators moving from education phase to enforcement phase
- Geolocation sweep signals expansion beyond obvious tracking to contextual/behavioral data
- Forces martech vendors to make privacy-by-design core architecture (not add-on compliance)

Structural Shifts Supported:

Shift#2: First-Party Identity

Regulatory pressure makes consent-based, first-party strategies mandatory regardless of browser policy



Cumulative GDPR Fines

GDPR fines: -5.88 billion cumulative, -1.2 billion in 2024 alone

CCPA Violation Fine

Inflation-adjusted CCPA fines effective January 2025: up to \$7,500 per intentional violation

Consumer Trust Impact

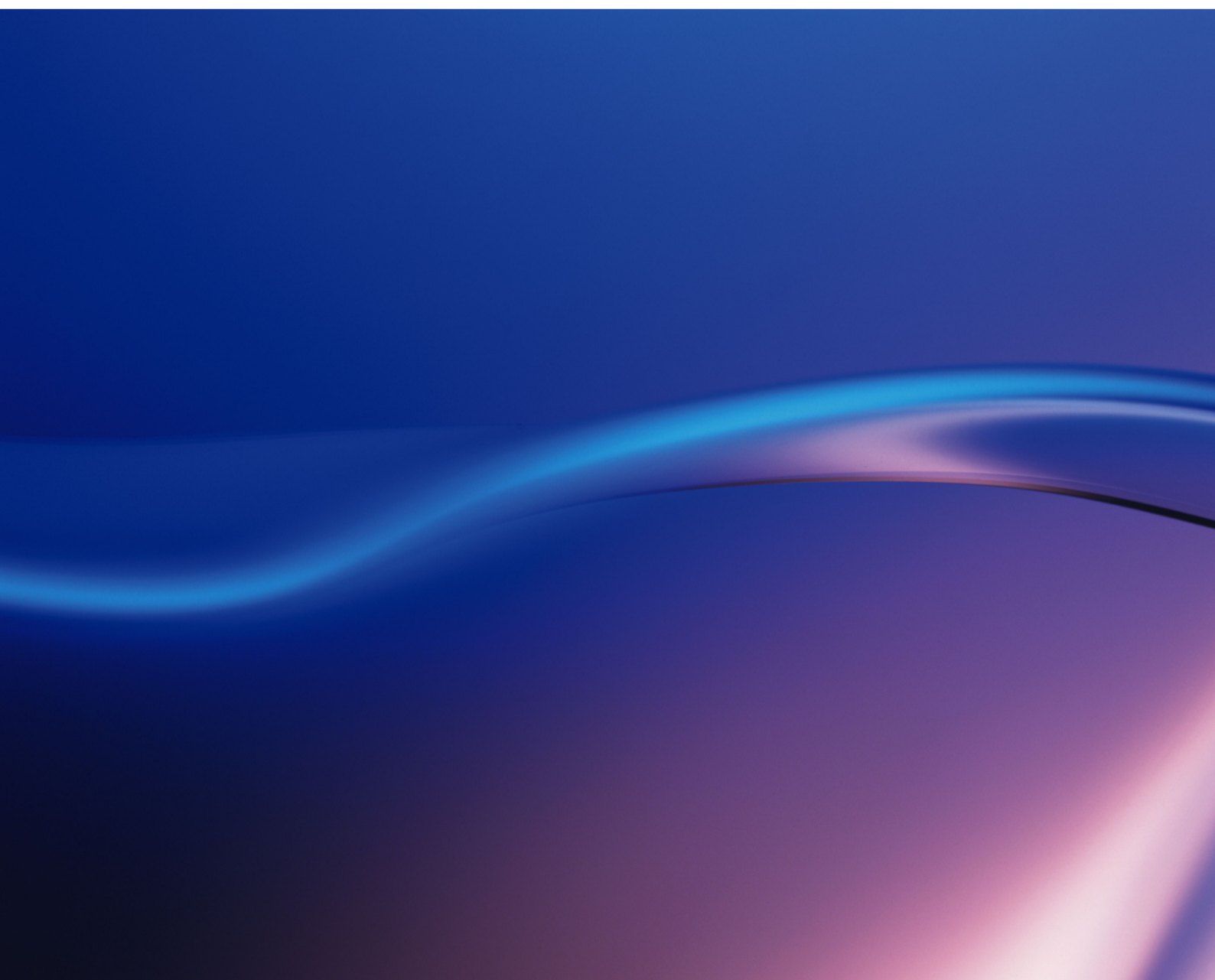
81% of consumers say company data handling reflects how company sees them (Cisco 2024 Privacy Survey)



Cookie Refusal Rate

40% of users already refuse cookies (CNIL report)

Evidence:

- GDPR fines: -5.88 billion cumulative, -1.2 billion in 2024 alone
 - CCPA cure period ended December 31, 2024
 - Inflation-adjusted CCPA fines effective January 2025: up to \$7,500 per intentional violation
 - March 2025 investigative sweep on geolocation data
 - 81% of consumers say company data handling reflects how company sees them (Cisco 2024 Privacy Survey)
 - 40% of users already refuse cookies (CNIL report)
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STORY #7: CDP Consolidation

Six Acquisitions in First Half

Six CDP (Customer Data Platform) companies were acquired in the first half of 2025, with three by digital experience vendors in late 2024/early 2025 (signaling start of trend). Major deals: Informatica (\$8B by Salesforce), mParticle (\$300M by Rokr), Lytics (by ContentStack), Coho AI (by Yotpo). Pattern shows standalone CDP model under pressure; platforms embedding CDP capabilities rather than buying separate tools.

Why It Mattered:

- Signals "end of standalone CDP era" category being absorbed into broader platforms
- Validates composable data architecture trend (data warehouse as source of truth)
- Real-time data activation and AI-powered engagement must be embedded in workflow tools, not separate systems
- Employment in CDP firms increased 3.4% in six months despite consolidation, indicating growth within acquiring companies
- Category fragmentation (15,000+ solutions) forcing simplification through consolidation

Structural Shifts Supported:

Shift#3: Full-Stack Consolidation

Platform vendors acquiring CDPs rather than partnering; functionality becoming table-stakes

Shift #2: First-Party Identity

CDP capabilities required for first-party data strategies but standalone model unviable

Major CDP Acquisitions H1 2025:



Informatica

\$8 billion by Salesforce (largest)



mParticle

\$300 million by Rokr (retail media + CDP integration)



Lytics

Acquired by ContentStack (content + data unification)

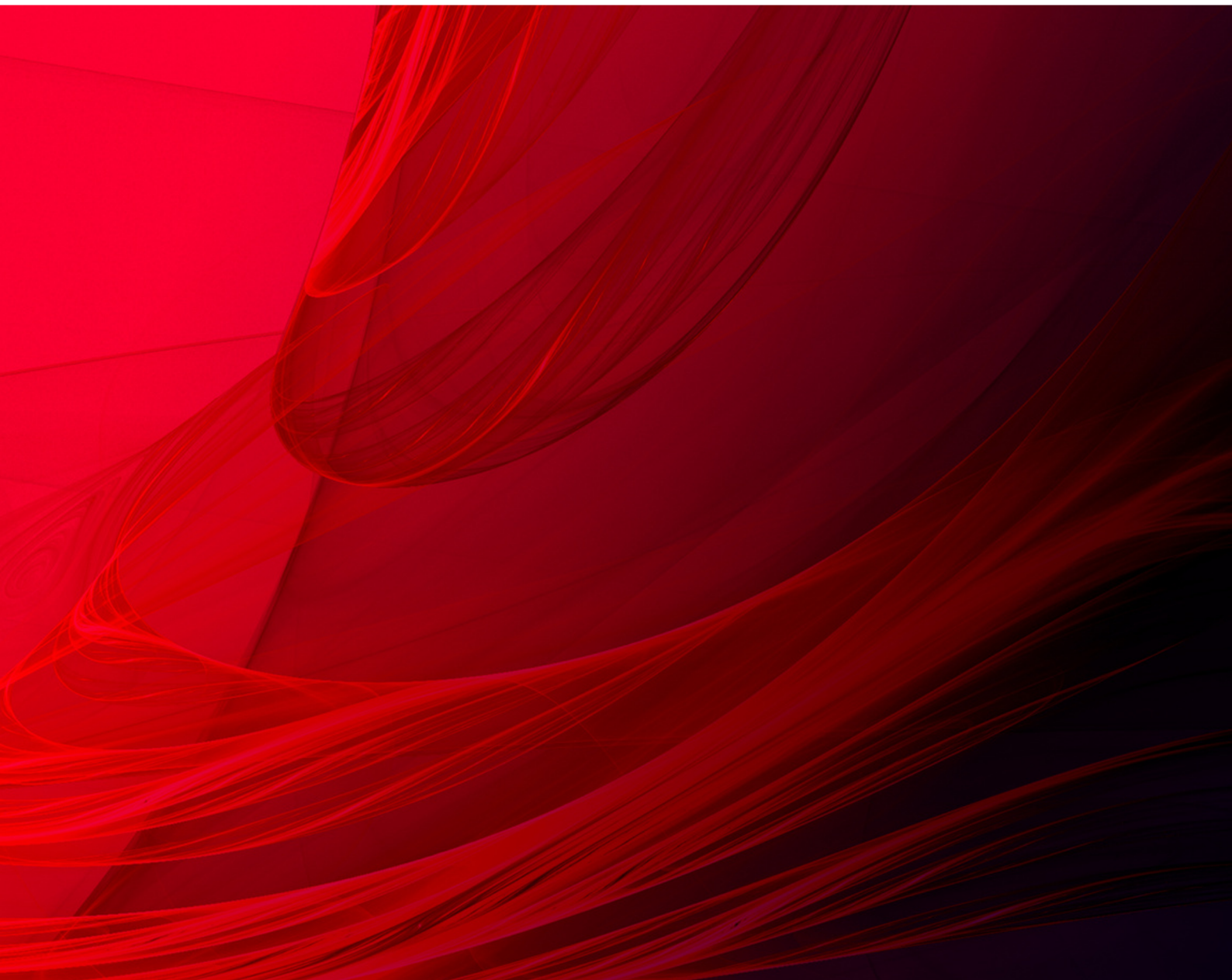


Coho AI

Acquired by Yotpo (ecommerce retention + AI-powered CDP)

Evidence:

- Six CDP acquisitions in H1 2025
- Employment in CDP sector up 3.4% in six months
- Composability trend: flexible use of data from cloud warehouses without moving to specific CDP databases



STORY #8: Agencies Acquire Data Collaboration Platforms

WPP acquired InfoSum (data cleanroom vendor) and Publicis Groupe acquired Lotame (data collaboration platform) in early 2025. Both deals position agencies to help clients maximize first-party data value while maintaining privacy. InfoSum brings diverse datasets for AI model training; Lotame expands Publicis's Epsilon platform to 4 billion customer profiles (91% of adult internet users globally).

Why It Mattered:

- Agencies moving upstream into data/tech capabilities to protect margins as creative production commoditizes via AI
- Data collaboration platforms enable privacy-safe brand-to-brand and brand-to-publisher partnerships (post-cookie world)
- First-party data combined with clean room technology becomes core agency offering, not just media buying
- Validates that data infrastructure (not creative services) is future agency value proposition
- Both deals emphasize AI training data value, not just marketing activation

Structural Shifts Supported:

Shift #2: First-Party Identity

Agencies positioning for cookieless future with data collaboration capabilities

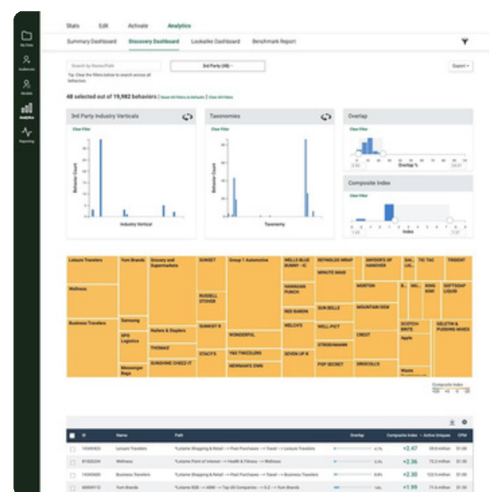
Shift #4: Creative/Media/Analytics Convergence

Agencies must own data layer to deliver integrated services



WPP Acquires InfoSum

Data clean room vendor providing large, diverse datasets for AI model training and privacy-safe collaboration



Publicis Acquires Lotame

Data collaboration platform expanding Epsilon to 4 billion customer profiles, 91% of adult internet users worldwide

STORY #9: Homegrown MarTech Resurgence

5X Jump in Custom Platforms

Custom-built martech platforms jumped from 2% to 10% of B2B organizations citing them as stack center (5X increase). Overall, 24% of organizations plan to add homegrown martech solutions in the next 12 months. This reverses a decade-long shift from custom to commercial solutions. AI lowering development barriers enables marketers to build specialized tools fitting exact workflows rather than adapting to vendor products.

Why It Mattered:

- AI democratizing software development creates "build vs. buy" inflection point Enterprises
- recognize that unique competitive advantages require unique tooling Commercial vendors
- face new competition from internal development teams armed with AI assistants
- Validates that 15,000+ commercial solutions still can't address every use case
- Marketing becoming technical discipline requiring in-house engineering capabilities

Structural Shifts Supported:

Shift #5: Marketing Engineering
Custom development requires technical talent within marketing organizations

Shift #1: AI-Native Architecture
AI tools making custom development economically viable



Custom as Stack Center

Custom platforms as stack center: 10% (B2B), up from 2% in 2024 (5X increase)

Planning to Add

24% of organizations planning to add homegrown martech in next 12 months

Using Generative AI

68.6% using generative AI tools (often for custom automation)



More Tools Than Before

62.1% using more tools than two years ago

STORY #10: Adobe Launches Agent Orchestrator

AI as Platform Layer

Adobe introduced Experience Platform Agent Orchestrator as the "new agentic layer" for Adobe Experience Platform. It leverages the platform's rich data and customer knowledge to power purpose-built AI agents that execute complex decision-making and problem-solving at scale with human oversight. Specialized agents include Audience Agent (account-based audience exploration, duplicate detection), plus agents in conversational interface via AI Assistant.

Why It Mattered:

- Signals enterprise software moving from "tools" to "agents"⁴ autonomous systems operating on behalf of users
- Position data infrastructure (Experience Platform) as a competitive moat; AI agents are only as good as the data they access
- Establishes architectural pattern: platform layer³ agent orchestration³ specialized agents³ human oversight
- Demonstrates AI moving from feature (e.g., "AI-powered recommendations") to architecture (agents coordinating across platforms)
- Adobe's unified metadata advantage (objects, fields, relationships) becomes the foundation for context-aware AI

Structural Shifts Supported:

Shift#1: AI-Native Architecture

Agent Orchestrator represents platform-level AI, not application-level features

Shift #3: Full-Stack Consolidation

Platform vendors must own AI orchestration layer to remain relevant

Key Capabilities:



Agent Orchestrator

Launched as "new agentic layer" in Adobe Experience Platform



Audience Agent

Supports account-based audiences, conversational exploration, duplicate detection



AI Assistant Integration

Integrates with Agent Orchestrator for natural language interface



Unified Customer Graph

Launched November 2025: 45% faster campaign activation

STORY #11: Salesforce Agentforce

8,000+ Deals Since September Launch

Salesforce's Agentforce platform, enabling autonomous AI agents across sales, service, marketing, and commerce, closed over 8,000 deals since its September 2024 launch (approximately half paid). Data Cloud and AI annual recurring revenue surpassed \$1 billion, growing over 120% year-over-year. Nearly 60% of the top 100 deals in Q1 FY2026 included Data Cloud and AI. Demonstrates that agentic AI moved from experimental to revenue-generating at enterprise scale.

Why It Mattered:

- Validates commercial viability of agentic AI (not just demo-ware)
- \$1B ARR threshold signals AI agents becoming material business line, not science project
- Half of deals being paid (vs. free trials) shows willingness to invest despite economic uncertainty
- 60% attachment rate in large deals proves AI capabilities now table-stakes for enterprise software selection
- Informatica acquisition (May/November 2025) directly supports Agentforce data requirements

Structural Shifts Supported:

Shift #1: AI-Native Architecture

Commercial success validates AI-first platform strategy

Shift #3: Full-Stack Consolidation

Data Cloud + AI bundle demonstrates platform value prop

8,000

Agentforce Deals

8,000+ Agentforce deals closed (approximately 4,000 paid)

\$1B+

Data Cloud + AI ARR

Data Cloud + AI ARR: \$1 billion+ (120%+ YoY growth)

60%

Top Deal Attachment

60% of top 100 deals included Data Cloud and AI

\$41B

FY 2026 Revenue Guidance

Full-year FY2026 revenue guidance raised to \$41.0-41.3 billion (8-9% growth)

"Informatica acquisition directly enables Agentforce with comprehensive data foundation, validating the thesis that AI effectiveness depends on data infrastructure quality."

STORY #12: Loop Marketing Framework

HubSpot Redefines Funnel

HubSpot introduced "Loop Marketing" as a replacement for the traditional linear funnel, acknowledging AI's role in continuous optimization. Four-stage infinity loop: Express (define values in messaging) ³ Tailor (AI-driven personalization) ³ Amplify (multi-channel distribution) ³ Evolve (AI analysis and real-time optimization). Represents a shift from campaign-based to continuous, AI-mediated customer engagement.

Why It Mattered:

- Challenges 100+ years of funnel-based marketing thinking (AIDA model from 1898, updated through decades)
- Acknowledges customer journeys no longer linear; AI and proliferation of touchpoints create "messy middle"
- Positions AI as co-pilot in continuous optimization rather than one-time campaign tool
- Influence potential: HubSpot has millions of users; framework could reshape how SMBs and mid-market approach marketing
- Philosophical shift: "campaigns" become outdated concept replaced by "continuous loops"

Structural Shifts Supported:



Shift #4: Creative/Media/Analytics Convergence

Loop collapses traditional boundaries between planning, execution, and analysis



Shift #1: AI-Native Architecture

Framework requires AI at every stage, not optional add-on

The Four Stages of Loop Marketing:



Evidence:

- Loop Marketing launched at INBOUND 2025 (September)
- Four stages: Express ³ Tailor ³ Amplify ³ Evolve
- Entire Marketing Hub interface rebuilt around Loop methodology
- Google's "messy middle" research cited as evidence for non-linear journeys
- Existing funnels and stages require remapping to new framework

"The Loop Marketing framework represents a fundamental rethinking of how marketing works in an AI-powered world. It's not just a new model4it's a new philosophy that treats marketing as a continuous, adaptive system rather than a series of discrete campaigns."

STORY #13: Data Integration Remains Top Challenge

65.7% Cite as Biggest Hurdle for MarTech Success

Despite widespread efforts towards platform consolidation and significant investments in MarTech, data integration stubbornly persists as the single largest challenge. The State of Stack 2025 survey revealed that a staggering 65.7% of respondents identified data integration as their primary obstacle in managing their MarTech ecosystems. This critical bottleneck directly impacts the effectiveness of advanced AI applications, which, without access to clean, cohesive, and well-integrated data, consistently fail to deliver optimal results. The issue underscores a fundamental truth: robust data infrastructure, not just sophisticated algorithms, is the prerequisite for AI adoption at scale.

Why It Mattered:

- **Explains High-Value Acquisitions:** The persistent data integration problem directly justified premium valuations, such as Salesforce's reported \$8 billion acquisition of Informatica.
- **Bridging Hype and Reality:** It exposed the significant gap between the widespread enthusiasm for AI and the practical reality that AI models are only as good as the data they consume.
- **Validates "Data-First" Strategies:** This challenge reinforced the necessity of prioritizing a "data-first" approach, building a solid data foundation before layering on "AI-first" initiatives.
- **Technical Debt Accumulation:** Over a decade of rapid MarTech accumulation has created immense technical debt, leading to organizational friction and hindering agile innovation.
- **Paradoxical Stack Growth:** Despite consolidation trends, the average MarTech stack continued to grow by 2.2% in 2025, further exacerbating the inherent integration complexities.

Structural Shifts Supported:

Shift #3: Full-Stack Consolidation

The acute pain of data integration is a primary driver behind increased platform consolidation and strategic acquisitions.

Shift #1: AI-Native Architecture

"Without data, AI applications just aren't going to work very well"4emphasizing data quality as foundational for AI's success.

Integration Challenge

65.7% of survey respondents cited data integration as their biggest MarTech stack challenge.

Tool Proliferation

Average MarTech stack includes **20-80 tools**, depending on organization size.

Continued Growth

Stack size grew **2.2%** in 2025, despite industry calls for rationalization.

More Tools Used

62.1% of organizations reported using more MarTech tools than they did two years prior.

"The persistent challenge of data integration proves that while AI promises transformative power, its realization remains shackled by the underlying data infrastructure. Clean, connected data isn't just a nice-to-have; it's the fundamental operating system for modern MarTech."



STORY #14: Mid-Market AI Adoption Lags Despite Availability

Only 33% Use AI Widely, Facing Key Barriers

A significant report from Intuit Mailchimp, titled "The Marketing Equalizer," highlighted a crucial disparity in AI adoption within the mid-market segment (companies with 10-499 employees). While an overwhelming 98% of these businesses acknowledge AI's potential to enhance marketing effectiveness, a mere 33% have broadly integrated AI into their operations. This "AI hype vs. AI reality" gap is primarily attributed to three persistent barriers: a critical lack of in-house expertise (39%), ongoing integration challenges (35%), and growing data privacy concerns (33%). With over half of mid-market companies operating with lean marketing teams of ten or fewer staff, resource constraints further compound these adoption hurdles.

Why It Mattered:

- **Exposed the "AI Hype vs. Reality" Gap:** Demonstrated that broad awareness of AI benefits does not automatically translate into widespread implementation, particularly among resource-constrained mid-market players.
- **Highlighted Competitive Stratification:** As the mid-market constitutes a substantial portion of the business economy, lagging AI adoption here creates a significant competitive divide between early and late adopters.
- **Emphasized Skills Over Tech Gap:** The report underscored that the primary bottleneck for AI integration is often a deficit in human skills and organizational readiness, rather than a lack of available technology.
- **Validated Organizational Change Needs:** Reinforced the idea that AI tools are not plug-and-play solutions; successful adoption necessitates big organizational change, specialized expertise, and a foundation of clean, well-integrated data.
- **Shaped Platform Strategies:** Positioned the SMB/mid-market as a key battleground for platforms like HubSpot and Mailchimp, which are increasingly focusing on offering "AI in a box" solutions that simplify adoption.

Structural Shifts Supported:

Shift #1: AI-Native Architecture

The identified adoption barriers reveal a critical disconnect between advanced platform capabilities and the mid-market's readiness to leverage them.

Shift #5: Marketing Engineering

The significant deficit in in-house AI expertise directly fuels the rising demand for specialized marketing engineering talent to bridge this skills gap.

AI Belief

98% of mid-market companies believe AI will improve marketing.

Widespread Use

Only **33%** of mid-market companies use AI widely.

Lack of Expertise

39% cite lack of in-house expertise as a top barrier.

Integration Hurdles

35% point to integration challenges as a major obstacle.

Lean Teams

Over **50%** of mid-market companies have 10 marketing staff.

"The mid-market's struggle with AI adoption isn't about willingness; it's a stark reminder that technology's promise is only realized when organizations are equipped with the right skills, integrated systems, and a clear strategy to overcome practical barriers."

STORY #15: MarTech Data Platform Market Projected to Hit \$254.8B by 2034

MarTech Data Platform Market Set for Exponential Growth

A landmark report by Market.us projected the MarTech Data Platform market to skyrocket from an estimated \$11.6 billion in 2024 to a staggering \$254.8 billion by 2034, demonstrating an exceptional compound annual growth rate (CAGR) of 36.20%. This explosive growth is primarily fueled by the industry's relentless pursuit of hyper-personalized marketing, the increasing reliance on automation, and the critical need for AI-driven decisioning. North America continues to dominate this burgeoning sector, holding a commanding 39.5% global market share, valued at \$4.58 billion in 2024. This forecast underscores the rapid consolidation of data infrastructure as a foundational and indispensable category within the broader MarTech landscape, signaling a pivotal shift towards data-centric strategies.

Why It Mattered:

- **Data-First Thesis Validated:** The projection indicates that data infrastructure is growing at an accelerated pace compared to the application layer, reinforcing the strategic imperative of a "data-first" approach for modern marketing organizations.
- **Structural Shift Confirmed:** A 36.20% CAGR is among the highest observed in the technology sector, suggesting a fundamental structural shift in the MarTech industry rather than a mere cyclical trend.
- **Exceeds Platform TAMs:** The \$254.8 billion projection for 2034 surpasses the total addressable markets of many individual MarTech platform vendors, highlighting the immense value being concentrated in data infrastructure.
- **North American Leadership:** North America's substantial market dominance (39.5%) reflects the region's mature digital infrastructure, high enterprise cloud adoption rates, and a proactive stance toward data-driven innovation.
- **Sector-Specific Drivers:** The retail sector emerged as a key driver, actively adopting these platforms to unify transactional, behavioral, and loyalty data, enabling more sophisticated customer engagement strategies.

Structural Shifts Supported:

Shift #3: Full-Stack Consolidation

The rapid expansion of the data platform market makes these solutions core infrastructure components, justifying premium valuations in strategic mergers and acquisitions.

Shift #1: AI-Native Architecture

The report solidifies the notion that the efficacy of AI applications is directly dependent on robust data platforms, thereby driving their demand and growth as foundational enablers.

36.20%

Projected CAGR

Annual growth rate for MarTech Data Platform market (2024-2034).

\$254.8B

Market Value

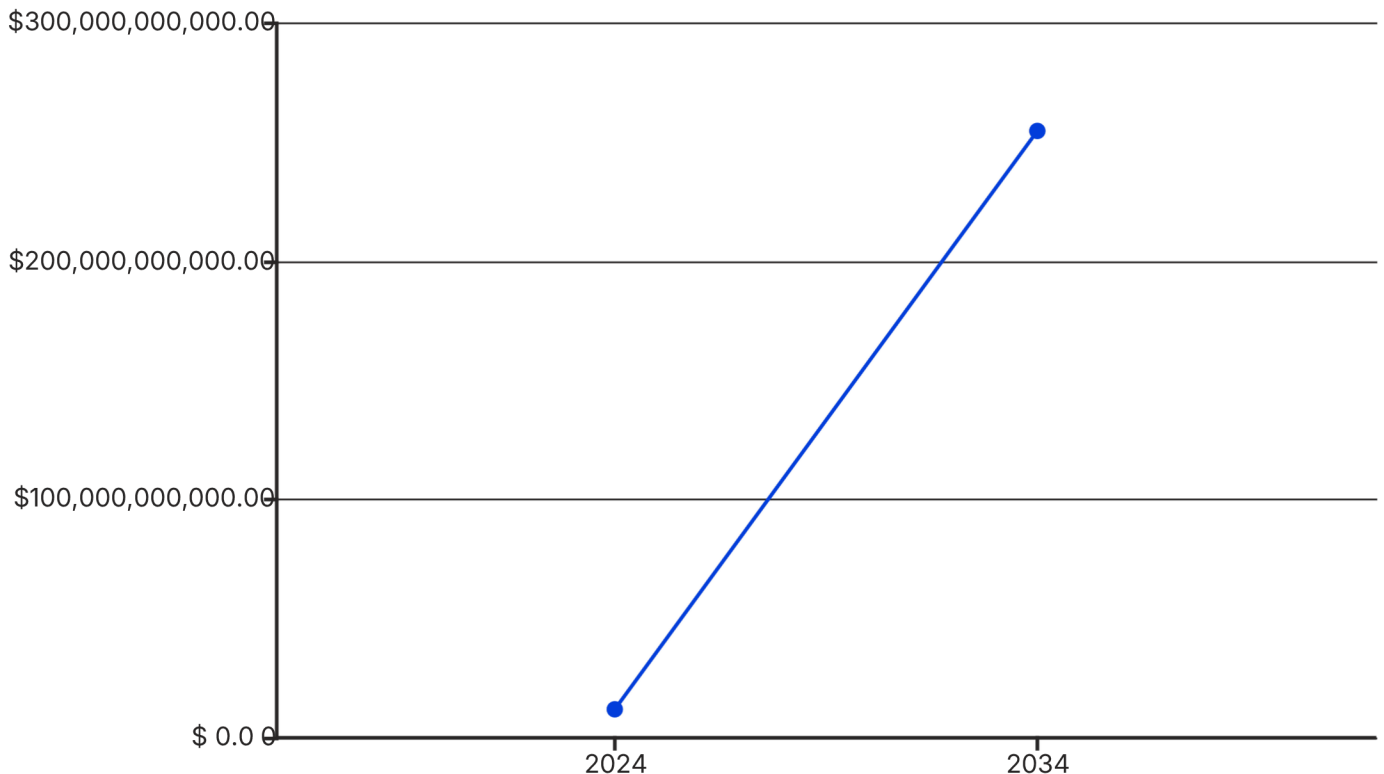
Estimated market size by 2034, a significant increase from \$11.6B in 2024.

39.5%

North America Share

Leading global market share, representing \$4.58B in 2024.

This strong market forecast indicates that businesses are increasingly prioritizing the underlying data infrastructure to power their advanced marketing initiatives, cementing data platforms as the backbone of future MarTech strategies.



PART III: STRATEGIC IMPLICATIONS FOR 2026

As the MarTech landscape continues its rapid evolution, CMOs face a critical juncture. The shifts observed in 2025, from AI-native architecture to the consolidation of data platforms, necessitate a proactive and strategic response. This section outlines immediate actions for Q1 2026, key strategic bets for the coming years, and potential risks to monitor, ensuring marketing leaders are equipped to navigate the future effectively.

For CMOs: Immediate Actions (Q1 2026)

To capitalize on emerging opportunities and mitigate risks, CMOs must prioritize these critical initiatives in the first quarter of 2026:

AI Infrastructure Audit

Conduct a thorough assessment of your current martech stack's AI-readiness. Identify platforms lacking native AI agents or orchestration layers and initiate an RFP process for AI-native alternatives. Budget a 20-30% premium for solutions that embed AI functionality at their core to ensure future competitiveness and efficiency.

Data Unification Sprint

Launch a focused 90-day initiative to map existing data flows, identify critical gaps, and consolidate disparate data sources. With 65.7% of organizations citing data integration as their top challenge, clean, unified data is non-negotiable for successful AI implementation and informed decision-making.

Talent Acquisition: Marketing Engineers

Begin actively recruiting for "marketing engineer" roles. These hybrid positions combine strategic marketing acumen with technical expertise in data science, automation, and AI. Aim to onboard at least one technical hire per ten marketing staff by the close of 2026 to bridge the critical AI skill gap within the team.

First-Party Data Strategy Overhaul

Despite temporary cookie reprieves, anticipate over 70% opt-out rates for third-party cookies by mid-2026. Develop and implement robust value exchange programs (e.g., loyalty rewards, exclusive content access, enhanced personalization) that incentivize customers to share first-party data directly.

AI Governance Framework Establishment

Proactively establish a comprehensive AI governance framework. This framework should define oversight for AI-generated content, autonomous agent actions, and algorithmic decision-making processes, safeguarding brand safety, ensuring ethical deployment, and mitigating potential legal and reputational exposures as AI velocity increases.

Strategic Bets (2026-2027)

Beyond immediate actions, CMOs should make these strategic investments to shape their marketing future:

Platform Consolidation

For mid-market and enterprise organizations, standardize on 1-2 primary marketing platforms that offer deep, native AI integration. This consolidation, moving away from 20+ point solutions, is projected to yield 30-40% cost savings alongside significant gains in operational velocity and data consistency.

Agency Relationship Reset

Re-evaluate existing agency relationships to determine if they provide strategic value beyond routine execution. With increasingly AI-enabled in-house teams, production-level work may be more efficiently handled internally, allowing agencies to focus on high-level strategic guidance and innovation.

Composable Architecture Adoption

For organizations with complex needs, embrace a "composable" martech architecture. This involves a central, robust platform (e.g., HubSpot, Salesforce, Adobe) serving as a hub, complemented by specialized applications connected via open APIs. This approach requires significant internal integration engineering but offers unparalleled flexibility and customization.

Risks to Monitor

- **AI Skill Gap:** A persistent lack of internal AI expertise could create a significant competitive disadvantage against peers who are aggressively investing in technical talent and AI education.
- **Data Quality Debt:** Poor data quality and fragmented data sources will accumulate faster than remediation efforts, rendering AI initiatives ineffective and eroding trust in data-driven insights.
- **Vendor Lock-in:** As major platforms increasingly bundle advanced AI capabilities into their core contracts, organizations face a heightened risk of vendor lock-in, potentially limiting agility and increasing long-term costs if not carefully managed.

For CIOs: Immediate Actions (Q1 2026)

For Chief Information Officers, the rapid evolution of MarTech presents both significant opportunities and complex challenges. Ensuring a secure, scalable, and integrated technology environment is critical for marketing's success. The following immediate actions and strategic bets are crucial for IT leaders to navigate the MarTech landscape effectively in 2026.

Immediate Actions (Q1 2026)

To build a resilient and high-performing MarTech foundation, CIOs must focus on these key initiatives in the first quarter of 2026:

1 **Prioritize Data Infrastructure Investment**

Recognize that modern marketing technology is fundamentally a data infrastructure challenge. Allocate substantial budget to critical components such as robust data warehouses, Customer Data Platforms (CDPs), comprehensive data governance platforms, and advanced integration tools. The complexity and volume of marketing data now frequently rival, and sometimes surpass, those of traditional transactional systems, demanding equivalent architectural consideration and investment.

2 **Enhance Security & Governance for AI**

Acknowledge the expanded attack surface introduced by AI agents accessing sensitive customer data across various systems. Implement a stringent zero-trust architecture, meticulously audit AI data access patterns, and ensure that GDPR, CCPA, and other relevant privacy regulations are natively embedded within all AI workflows and data handling processes. Proactive security measures are paramount to mitigate risks.

3 **Evolve Marketing-IT Collaboration Model**

The traditional "business vs. IT" dynamic is no longer sustainable given MarTech's criticality. Establish embedded IT engineers directly within the marketing organization or create a dedicated "marketing platform engineering" function that reports to the CIO with a dotted line to the CMO. This fosters deep collaboration, accelerates development, and ensures technical alignment.

Strategic Bets (2026-2027)

Beyond immediate priorities, CIOs should make these strategic investments to future-proof their organization's MarTech capabilities:

Modernize Data Lake/Warehouse Architectures

Modern MarTech stacks require cloud-native data warehouses (e.g., Snowflake, Google BigQuery, Databricks) as the authoritative source of truth. Legacy on-premise data stores will increasingly create insurmountable bottlenecks, hindering real-time insights and AI application. Prioritize migration and modernization efforts.

Embrace API-First Architecture

Composable MarTech demands a robust API management strategy, including advanced authentication, authorization, and monitoring. Invest in enterprise API gateways and developer portals to facilitate seamless integration between best-of-breed marketing tools and internal systems, promoting agility and extensibility.

Invest in Dedicated AI Infrastructure

Consider dedicated AI infrastructure (e.g., GPU compute, specialized model hosting platforms) for high-volume or custom marketing AI use cases. While cloud AI services (Azure OpenAI, AWS Bedrock, Google Vertex) are becoming increasingly cost-effective, strategic in-house capabilities may be necessary for competitive differentiation.

Risks to Monitor

- **Shadow IT Resurgence:** Marketers building custom solutions with AI assistants could lead to an uncontrolled proliferation of unsanctioned applications, exposing the organization to significant security, compliance, and data governance risks.
- **Vendor Consolidation Risks:** As major MarTech players acquire smaller, specialized providers, the risk of vendor lock-in and single points of failure increases, potentially limiting flexibility and increasing costs if not carefully managed.
- **Lagging Privacy Compliance:** Privacy regulations are expanding and evolving at an accelerated pace globally. Organizations whose compliance capabilities fail to keep pace face substantial legal, financial, and reputational penalties, especially with AI-driven data processing.

For Growth Leaders: Navigating the 2026 MarTech Landscape

Growth Leaders face the imperative to leverage emerging technologies for competitive advantage while maintaining customer trust and ensuring sustainable growth. The strategies outlined below emphasize agility, data-driven decision-making, and a customer-centric approach to thrive in the evolving MarTech ecosystem.

Immediate Actions (Q1 2026)

To secure immediate gains and build momentum, Growth Leaders should prioritize these critical initiatives in the first quarter of 2026:



Customer Data Velocity

The competitive advantage is rapidly shifting from "who has more data" to "who acts on data faster." Implement real-time data pipelines and automated decisioning, often powered by AI agents, for high-value customer moments such as personalized offers, instant support, and timely engagement triggers. This ensures relevance and responsiveness at scale.



Experimentation Cadence

AI's capabilities enable a 10- 100X increase in testing velocity across various marketing touchpoints. Establish a continuous experimentation culture where A/B testing and multivariate testing run constantly, rather than being confined to quarterly cycles. This rapid iteration requires robust governance to prevent a "wild west" scenario and ensure valid, actionable insights.



Channel Diversification

Recognize the declining efficiency of traditional paid media due to ongoing cookie deprecation and rising CPMs. Strategically invest in owned channels such as email, SMS, and push notifications. Furthermore, build vibrant customer communities and explore strategic partnerships, including data clean rooms, for collaborative brand initiatives that extend reach beyond conventional advertising.

Strategic Bets (2026-2027)

Looking beyond immediate wins, Growth Leaders must place strategic bets that will define their future market position and sustained success:



AI-Mediated Customer Journeys

Customers are increasingly interacting with sophisticated AI assistants (e.g., ChatGPT, Perplexity, Gemini) rather than solely relying on traditional search engines. Optimize your content not just for SEO, but specifically for Large Language Model (LLM) consumption. Develop "Generative Engine Optimization" (GEO) strategies to ensure your brand's presence and accuracy in these AI-driven conversations.



Zero-Party Data Programs

Shift focus from surveilling customers via third-party data to encouraging customers to voluntarily share their preferences and intentions. Implement robust preference centers, interactive quizzes, and engaging loyalty programs that explicitly trade transparent value for data. This builds trust and provides higher-quality, consented insights for personalization.



Retention Over Acquisition

AI agents excel at nurturing and retaining existing customers due to the availability of historical data and established relationships. Reallocate significant budget and strategic focus from costly paid acquisition campaigns to AI-powered retention and expansion initiatives. This fosters loyalty and maximizes customer lifetime value.

Risks to Monitor

- **Strategic Thinking Erosion:** An over-reliance on AI automation in decision-making could inadvertently reduce human strategic thinking and creative risk-taking, potentially leading to homogenized marketing approaches.
- **Customer Privacy Backlash:** Aggressive or opaque AI personalization may feel invasive to customers, leading to privacy concerns, trust erosion, and potential brand damage. Transparency and control are paramount.
- **AI Experience Gap:** Competitors who move faster and more effectively on AI adoption could create a significant experience gap, providing superior personalized customer journeys and gaining market share.

CONCLUDING OBSERVATIONS

2025 will be remembered as the year marketing technology definitively split into two eras: before agentic AI and after. The structural shifts documented here are not cyclical fluctuations but categorical transformations in how marketing work gets done.

Three Enduring Truths from 2025:

Data Infrastructure > Application Layer

The Salesforce-Informatica deal crystallized what became undeniable throughout 2025: owning the data layer matters more than owning the application layer. AI agents are only as intelligent as the data they access. Vendors without comprehensive data platforms face obsolescence; organizations without data strategies face irrelevance.

AI Moved from Augmentation to Autonomy

Early AI tools augmented human work (recommendations, auto-complete). 2025's AI agents operate autonomously, making decisions, taking actions, coordinating across systems. This isn't incremental improvement; it's a different category of technology requiring different organizational models, governance structures, and talent profiles.

Privacy Won, But Not How We Expected

The third-party cookie didn't die; it became irrelevant. User choice mechanisms, regulatory enforcement, and cultural shifts toward privacy created functionally cookieless environments despite Chrome's policy reversal. Organizations betting on cookie survival will face material disadvantage as opt-out rates climb.

The Paradox of 2025: Consolidation and proliferation occurred simultaneously. M&A surged 118% as platforms absorbed capabilities. Yet the landscape grew 9% to 15,384 solutions. And custom-built tools resurged 5X. This isn't contradiction; it's market bifurcation. Commodity capabilities consolidate into platforms. Specialized capabilities fragment into long tail. Organizations succeed by understanding which is which.

Looking Forward: 2026 will separate pretenders from contenders. Organizations that treated 2025 as observation year will scramble to catch up. Those that treated it as transition year, investing in data infrastructure, technical talent, and AI-native platforms, will compound advantages. The window for graceful transition is closing. By 2027, the gap between AI-native and AI-reluctant organizations will be insurmountable.

The question is no longer whether AI reshapes marketing. It's whether your organization is ready for what comes after.