

Martech Report 2026



1. Introduction

This section provides an overview of the report's purpose, the survey design, and the key findings. It offers insight into how European organizations approach Martech from strategic and operational perspectives.

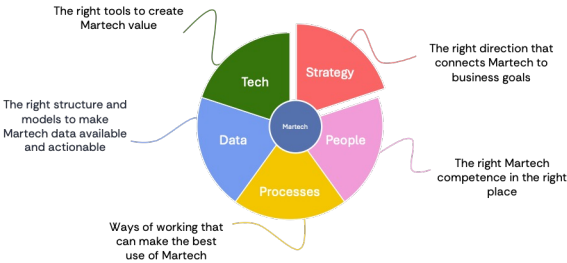
1.1 About the report

For nine years straight, the Martech Report has documented the changing role of data, technology, and insights in marketing. During that time, the focus has shifted from the early adoption of CRM and automation to customer experience and, most recently, the growing influence of AI. Each edition reflects the priorities and developments shaping Martech at that time.

The 2026 report examines where organizations currently stand. It examines recent investment patterns, changes in perceived Martech maturity, and the ongoing challenges companies face. In doing so, the report captures the potential that organizations see in Martech, as well as the factors that make realizing that potential difficult.

As in previous editions, this report focuses on organizations that consider themselves leaders in Martech maturity. The report examines these companies’ characteristics, ambitions, and goals for continued investment.

In short, this report’s findings provide an up-to-date view of Martech across Europe and offer insight into its future development.



1.2 About the survey

The Martech Report is based on a survey conducted across seven different markets. A total of 1,372 participants responded to the survey in May 2026.

The respondents are distributed as follows:
Sweden – 568 Finland – 56, the Netherlands – 44, Norway – 524, Germany – 57, UK – 59, Austria – 53.

Country	Number of respondents
Sweden	568
Finland	56
The Netherlands	44
Norway	524
Germany	57
The United Kingdom	59
Austria	53

1.3 Executive Summary

The 2026 Martech Report provides an in-depth look at how organizations in Scandinavia and Europe approach marketing technology. Based on responses from 1,372 participants across seven markets — including 1,092 from Scandinavia — the report sheds light on current realities and emerging priorities.



Key Findings

Maturity pays off and builds momentum

Mature organizations report greater impact across every measured outcome. Those who are already seeing strong value are also more likely to increase their investment, which creates the potential for a widening gap in the landscape.

The Investment-Diagnosis Paradox

Competence is the most common barrier to Martech progress. Over half of organizations report lacking the necessary skills. However, the people dimension receive the least investment focus, suggesting that organizations may still turn to technology when identifying organizational constraints.

More cooks mean a better broth, but a messier kitchen

Organizations with more departments involved in the Martech budget report greater business impact but also face more collaboration challenges. This finding challenges the common assumption that collaboration friction reflects weak cross-functional value creation.

AI adoption is progressing.

Seventy-one percent of organizations now use AI in marketing technology, marking a shift from a “wait-and-see” approach to an “experiment-and-learn” one. However, most are still in the early stages of turning use into business value.

Refining Existing Capabilities

Mature organizations do not primarily focus on replacing their Martech stack with new technology. Instead, they emphasize strengthening what is already in place.

Implications

While the Martech landscape in 2026 shows clear progress, the distance between adoption and value remains significant. More mature organizations report a broader business impact, and AI has transitioned from observation to active experimentation. However, skills gaps and coordination challenges continue to hinder progress. Success increasingly depends on converting technology investments into repeatable value through stronger organizational capabilities.

2. The Martech Landscape Continues to Evolve

This section explores the evolution of the Martech landscape and its implications for organizations seeking to create value. It covers current maturity patterns, investment priorities, and AI adoption, as well as organizational barriers and coordination challenges that hinder further progress.

2.1 A redistribution of Martech maturity

This year's survey shows that most organizations now consider themselves to be at the midpoint of the Martech maturity scale. 58.1% select levels 3–4, compared to 25.4% at low maturity (levels 1–2) and 16.5% at high maturity (levels 5–6). Therefore, the 2026 landscape is characterized by a broad middle: organizations that have moved beyond the earliest stages but do not yet consider their capabilities to be advanced.

The apparent year-on-year change should be interpreted cautiously. In 2026, the response scale changed from 1–5 to 1–6, and the category definitions changed as well. These changes affect the size of the low-, mid-, and high-maturity groups, meaning the latest result is not directly comparable with previous years.

Therefore, the 2026 result should be treated as a new benchmark. While the historical series remains useful for context, it cannot establish on its own whether maturity has declined or recovered. The results, however, point to a redistribution in perceived Martech maturity, with most organizations now falling into the mid-maturity category.

What level of Martech maturity is your organization currently at?

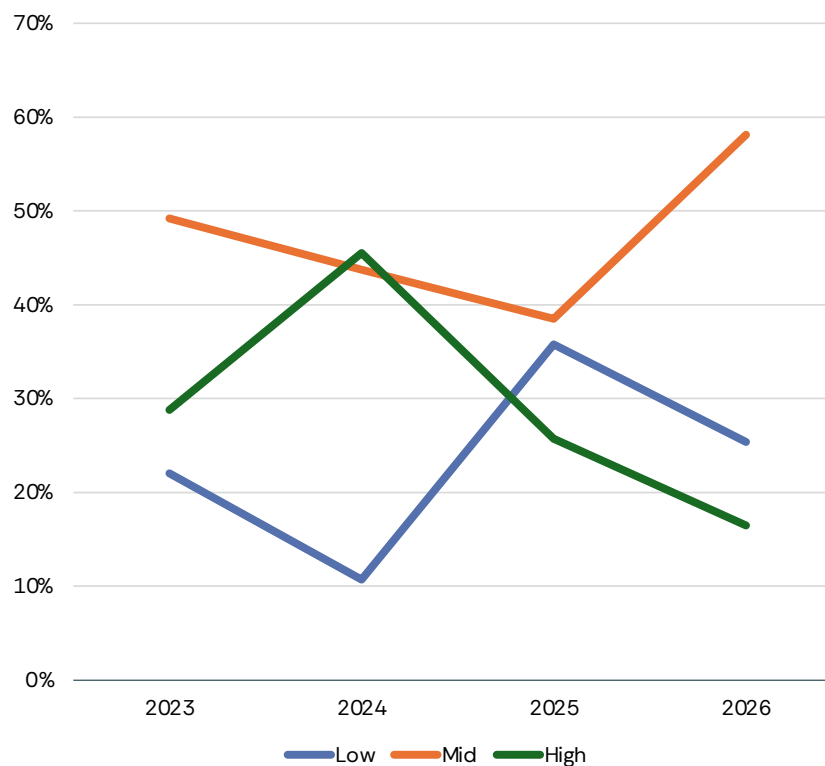


Figure 2.1: Perceived Martech maturity by year, 2023–2026

2023–2025: Low = 1–2, Mid = 3, High = 4–5. 2026: Low = 1–2, Mid = 3–4, High = 5–6. The response scale changed from 1–5 to 1–6 in 2026; comparisons should be interpreted directionally.

2.1.1 Similar averages conceal different maturity profiles

The country-level results show that the perception of Martech maturity is concentrated in the middle across all seven markets. However, the balance of low- and high-maturity organizations reveals distinct market profiles that are not fully captured by average scores alone.

The UK stands out with the highest average maturity, at 3.76, largely because it has the smallest low-maturity group. Austria has a high-maturity share comparable to the UK's, but it also has a substantially larger low-maturity group. This suggests a more polarized landscape. Germany is most heavily concentrated in the middle. Norway has the lowest average, at 3.17, and the largest low-maturity group. Sweden also falls below the cross-market average of 3.26.

Therefore, the country view points less to a simple ranking of markets and more to different maturity structures. Similar averages may indicate either a large middle or a greater divide between organizations at the lower and higher ends of the scale.

Perceived Martech maturity per country 2026

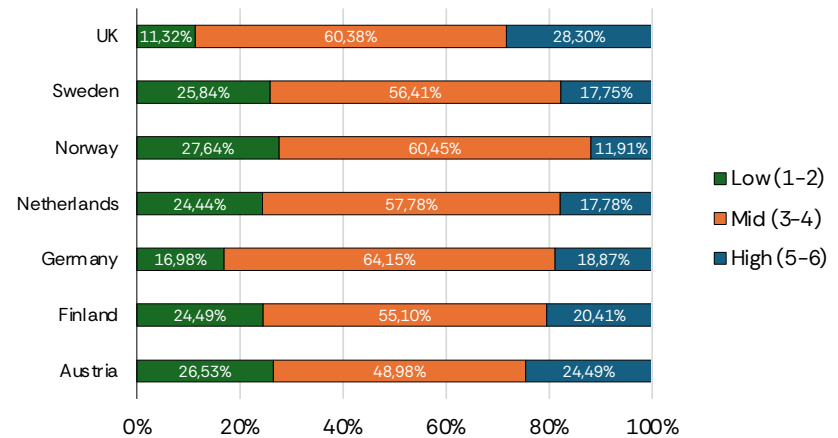


Figure 2.2: Perceived Martech maturity per country

Average maturity 2026

- Austria: 3,46
- Finland: 3,37
- Germany: 3,38
- Netherlands: 3,39
- Norway: 3,17
- Sweden: 3,26
- UK: 3,76

Interpret country results cautiously in markets with smaller response bases.

2.2 Higher maturity is associated with greater reported business impact

This year's results clearly show a relationship between Martech maturity and perceived business impact. On average, organizations with low maturity report a business effect of 2.64, compared to 3.66 among those with mid-level maturity and 4.54 among those with high maturity.

The same pattern was seen in all five areas measured by the survey. Organizations with a high level of maturity report a substantially greater impact in terms of customer acquisition, upselling and cross-selling, retention, customer experience, and efficient ways of working. These differences are particularly notable given their consistency across both customer-facing and operational outcomes.

The results suggest that Martech maturity is reflected not only in how well organizations perceive their capabilities but also in their ability to convert those capabilities into business value.

Reported business impact rises with perceived maturity

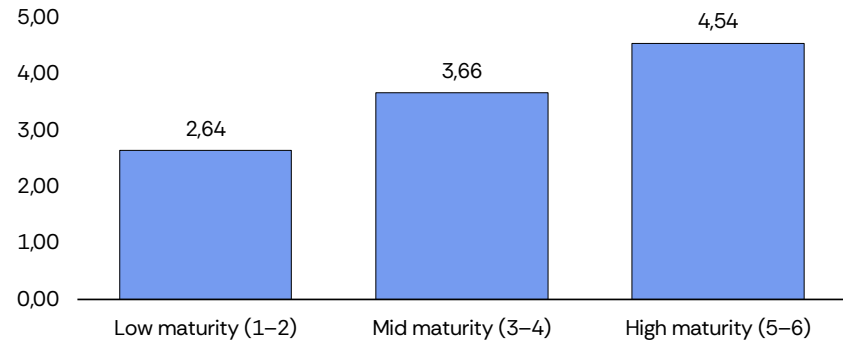


Figure 2.3: Average reported business impact by Martech maturity.

The relationship is consistent across every measured impact area

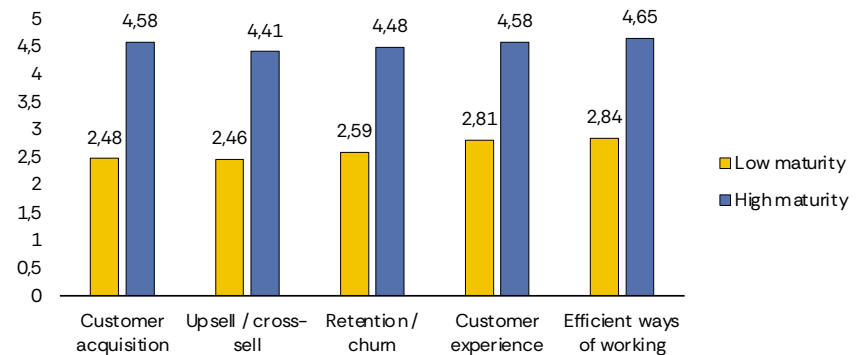


Figure 2.4: Average reported impact per area, low and high maturity comparison

2.2.1 The pattern is consistent with a Martech impact ladder

The distribution of high-impact responses indicates that the value of Martech increases with maturity.

At lower levels, the most widely reported benefits are those that are closest to day-to-day operations, such as more efficient ways of working and an improved customer experience.

As they reach the mid-maturity stage, these benefits become more common, and the reported impact on retention increases as well.

At the highest level of maturity, more than half of respondents report a high impact in every measured area, including acquisition, retention, and upselling or cross-selling.

This does not prove that all organizations follow the same sequence. However, it does indicate that commercial outcomes are reported more frequently as maturity increases.



We describe this pattern as the Martech Impact Ladder. Organizations first improve how they work, then how they serve and retain customers, and finally, how effectively they acquire and develop customers.

Therefore, Martech maturity is associated not only with greater efficiency but also with a stronger ability to translate operational improvements into broader commercial impact.

From operational gains to commercial impact

Impact area	Low maturity	Medium maturity	High maturity
Increase in customer acquisition	6,8%	12,5%	55,5%
Develop customers with upsell and cross-sell	4,9%	14,2%	51,3%
Retain customers and reduce churn	7,2%	17,0%	55,2%
Deliver excellent customer experience	10,1%	25,2%	58,3%
Efficient way of working	12,1%	27,5%	61,0%

Table 2.1: Share reporting high impact in each area (scores 5–6).

2.2.2 The reported impact and future investment reinforce each other

A clear pattern emerges when examining the relationship between the reported business impact of Martech and future investment plans. Organizations that report a greater impact from their current Martech investments are considerably more likely to increase their investments in the coming years. Among companies that reported a high business effect, 61% plan to increase their Martech investments. This compares with 43% of companies that reported a medium effect and 31% that reported a low effect.

The opposite pattern emerges among organizations that plan to maintain their current investment levels. Half of low-impact organizations expect investments to remain unchanged, compared to 32% of high-impact organizations. This suggests that demonstrating value can foster confidence and organizational support for continued investment.

Plans to increase investments into Martech

- Low effect ($\leq 3,0$): 30,7%
- Medium effect (3,1-4,4): 43,1%
- High effect ($\geq 4,5$): 61,0%

As reported impact increases, uncertainty decreases. Ten percent of companies with a low impact do not know how their Martech investments will develop, compared to only three percent of companies with a high impact.

Taken together, the findings suggest a reinforcing dynamic. Organizations that already generate value from Martech are more likely to continue investing, which gives them further opportunities to strengthen their capabilities. Conversely, organizations that struggle to demonstrate business impact are more likely to maintain current investment levels or remain uncertain about future spending.

Greater impact is associated with stronger investment intentions

Planned total Martech investment	Low effect	Medium effect	High effect
Increase	30,7%	43,1%	61,0%
Remain same	50,2%	47,0%	32,0%
Decrease	8,8%	5,0%	4,1%
Don't know	10,3%	4,8%	2,9%

Table 2.2: Planned Martech investment by reported business impact

2.2.3 A widening Martech divide

If organizations that are already generating strong business value continue to strengthen their capabilities while those that are struggling to demonstrate impact remain cautious, the gap between the two groups may become insurmountable. This investment pattern raises a broader question about how the Martech landscape may evolve over time.

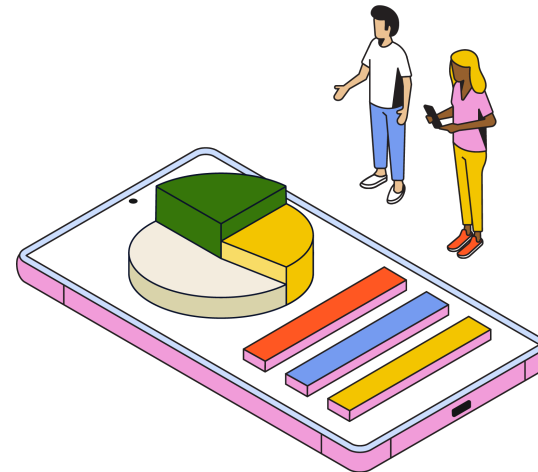
The challenge for low-maturity organizations is not just to increase spending, but also to identify where investments in strategy, people, processes, data, and technology can generate measurable business value. Without demonstrating this value, a cautious approach to investment may itself become a barrier to progress.

This creates a risk of a widening gap where Martech leaders continue to move forward, leaving behind organizations that are unable to keep pace.

Context

This pattern is also visible outside of Martech. According to McKinsey research, the gap between digital and AI leaders and laggards is widening as leading organizations gain a competitive advantage from their capabilities and investments.

(Source: McKinsey, Rewired and running ahead: Digital and AI leaders are leaving the rest behind, 2024)



2.3 The barriers to value are primarily organizational

This year’s results show that a lack of competence is the most frequently cited challenge to achieving the objectives of organizations’ Martech investments. In total, 40.5% of respondents ranked a lack of competence among their three most significant challenges, and 24.8% identified it as their number one challenge.

Lack of competence is followed by challenges related to customer data and insights (30.5%) and difficulties building collaboration (29.6%). Current IT infrastructure was also a top concern, cited by 28.9% of respondents.

These results, when considered together, suggest that the most common barriers to Martech value creation are not limited to technology itself, but also include organizational capabilities and the ability to effectively use data.

What are the biggest challenges you have faced in achieving the objectives behind your organization’s Martech investments?	Total (% of the respondents)
Lack of competence	40,5%
Challenges with customer data & insights	30,5%
Difficulties building collaboration	29,6%
Current IT infrastructure	28,9%
Lack of content	24,8%
Lack of tools	23,0%
Lack of top-management support	21,6%

Table 2.3.1: Share of respondents ranking each challenge among their three biggest challenges.



2.3.1 The capability gap encompasses both skills and capacity

The challenge ranking is reinforced by how organizations describe their readiness to achieve their Martech goals. Although 40.5% cited a lack of competency as one of their biggest challenges, the situation is even worse when it comes to having the necessary skills to achieve their goals.

The results show that 62% of organizations report lacking the necessary skills. The largest group has the necessary resources but lacks the required skills, while another substantial group lacks both resources and skills. This distinction is important because some organizations primarily face a capability development problem, while others face a broader capacity constraint. Treating both as recruitment issues would overlook the need for training, clearer prioritization, and changes to the operating model.

This finding aligns with McKinsey's observation that the rapid pace of change in Martech has significantly outpaced marketers' capabilities, resulting in the realization of only a fraction of the technology's potential¹.

Only one in six has the people and skills it needs

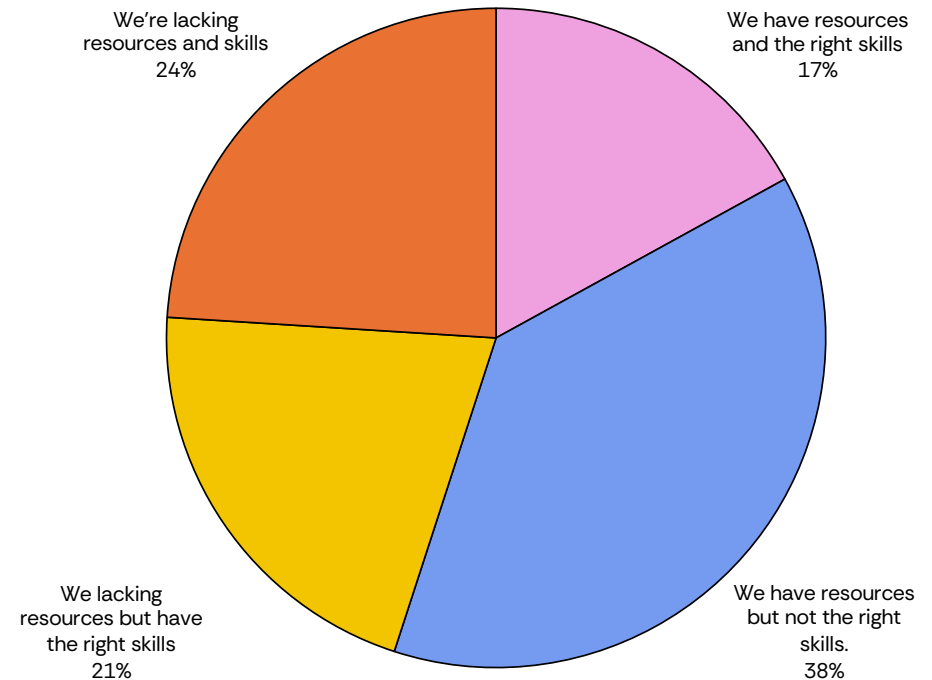


Figure 2.3.1: Currently, do you have the right people and skills in place to achieve the goals behind your company's investments in Martech?

1. McKinsey. Rewiring Martech: from cost center to growth engine. 2025

2.3.2 What competencies are lacking?

The rapid pace of Martech advancement is also reflected in the specific competencies that organizations find the most difficult to recruit or develop. AI/machine learning stands out, with 28.6% of respondents citing it as the most difficult competency to recruit or develop, more than ten percentage points above the other capabilities. This is unsurprising, given the growing role of AI in marketing. Gartner reports that 70% of marketers are expected to use AI in their roles, yet only half say they receive the organizational support, guidance, or training needed to do so effectively. This points to a growing gap between the demand for AI capabilities and organizations’ ability to develop them.

However, the challenge extends beyond AI. Marketing automation (17.7%), customer experience strategy (17.2%), data analysis (16.4%), and integration or technical implementation (14.3%) all rank relatively high.

The pattern suggests that the capability gap is not limited to one specific role. Organizations must continuously renew their portfolios of technical, analytical, and customer-oriented skills and connect them to operational ways of working.

AI is not the only difficult-to-develop skill

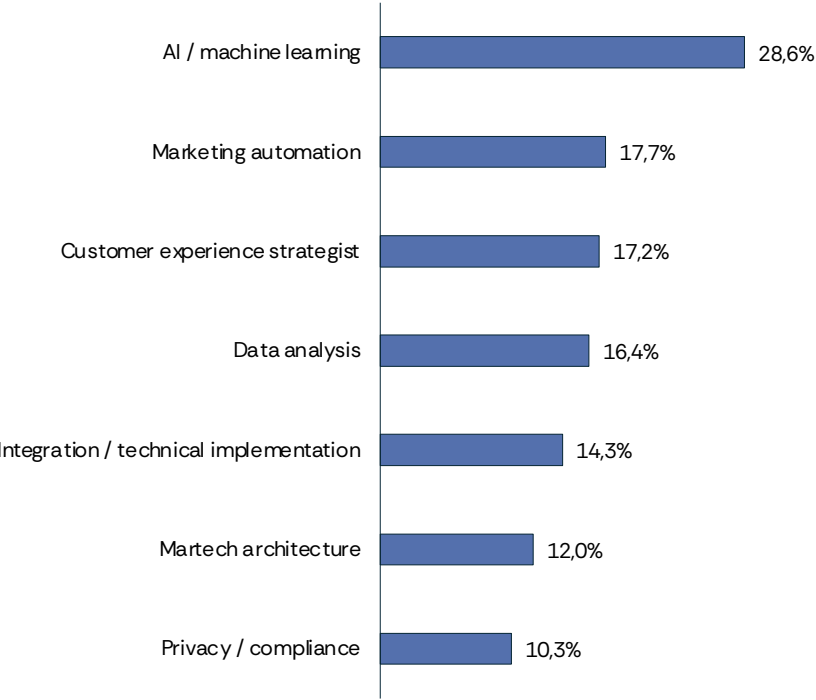


Figure 2.3.2: Share of skills organization cite that they are lacking

2.3.3 The diagnosis–investment paradox

Although most organizations claim to lack the necessary skills to achieve their Martech goals and cite a lack of competence as their biggest challenge, their upcoming investment plans do not reflect this issue adequately. Only 29.9% of respondents plan to invest in people over the coming years, while 38.6% plan to increase investments in technology. This reveals an interesting diagnosis–investment paradox: organizations allocate resources to improving their technology even though they recognize that the biggest barriers lie elsewhere.

One possible explanation is that technology investments offer a more visible and tangible way of demonstrating progress. The more difficult work of changing processes, behaviors, and developing the right competencies is easier to postpone, a tendency often described as “technology solutionism.” Whether deliberate or subconscious, this approach can create a false sense of progress, adding technical capacity without addressing the underlying barriers that prevent you from generating value.

Despite the lack of skills, technology attracts more investment

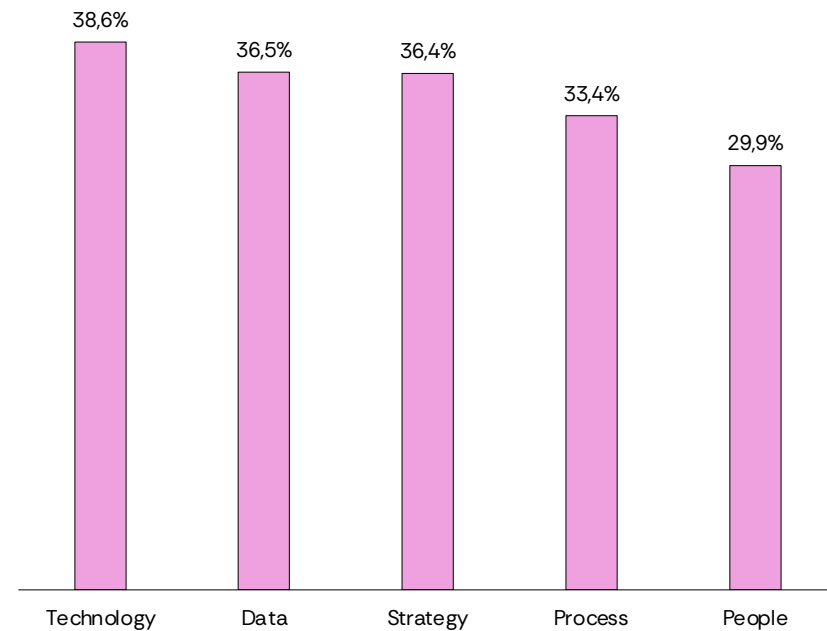


Figure 2.3.3: Planned investments over the next three to five years.

2.3.4 Investment priorities have reverted

Last year, we saw a notable shift in investment priorities. People and processes emerged as the two areas with the highest future investment potential. We interpreted this as preliminary evidence of a transition from purchasing capacity to developing the organizational capabilities necessary to create value.

This year's findings suggest that the landscape has shifted. The emerging transition appears to have lost momentum as organizations have returned to the historically familiar pattern of prioritizing technology and data. We believe the rapid development of AI may explain this reversal. As organizations seek to understand, adopt, and keep pace with AI's potential, their attention and investment may have once again gravitated toward technological foundations.

Future Investment Priorities 2026

1. **Tech** – Technology returned as the highest-ranked area for future investment, potentially reflecting the rapid development of AI.
2. **Data** – Improving data quality, structure and accessibility is once again a central priority.
3. **Strategy** – The newly added dimension ranked almost level with data, making it one of the leading priorities for future investment.
4. **Process** – Process improvement and automation remained important but ranked below technology, data and strategy.
5. **People** – People received the least investment focus, despite competence being the top challenge

(Source: The Martech survey 2026)

Future Investment Priorities 2025

1. **People** – Skills, leadership, and change management were ranked as the highest priorities.
2. **Process** – Structures and workflows were seen as critical to realizing the value of technology.
3. **Tech** – New tools remained important but were given lower priority than in previous years.
4. **Data** – Considered foundational but ranked lowest in the 2025 prioritization.

(Source: The Martech report 2025)

2.3.5 Overinvesting in technology can be counterproductive

Technology remains foundational to automation, personalization, and AI-enabled customer experiences. However, research⁴ suggests that the relationship between IT investment and innovation outcomes may be nonlinear. While benefits may initially increase, the marginal return can weaken — and eventually become negative — when the demands of integration, coordination costs, and organizational adjustments exceed an organization's ability to absorb additional technology.

While this evidence is not specific to Martech, it illustrates a relevant risk. Without complementary capabilities, additional technology can result in diminishing marginal returns and add complexity more quickly than the organization can convert it into value.

2.3.6 Complementary capabilities are necessary to create value – technology alone is not enough

This is because technology creates value through its complementary capabilities. To be effective, it must be supported by clear strategic direction, reliable data, effective processes, and skilled people. If any of these become the organization's limiting constraint, further investment in technology may create more complexity than capability. Therefore, the implication is not to invest less in technology, but rather to invest in the organizational system required to translate technology into repeatable business value.

External reference

"Roughly 10% of value comes from the technology, 20% from data and algorithms, and 70% from people, process, and operating model change."

(Source: BCG, *The leader's guide to transformation with AI 2026*)

2.4 AI is becoming mainstream

Last year's report revealed a widespread "wait-and-see" approach to AI usage, with companies closely monitoring the landscape to find the best solution. However, this year, 71.4% of respondents reported using AI in Martech. AI is therefore moving into the mainstream of Martech practice and becoming a natural part of it, even though adoption remains uneven.

Perceived AI solution maturity within Martech

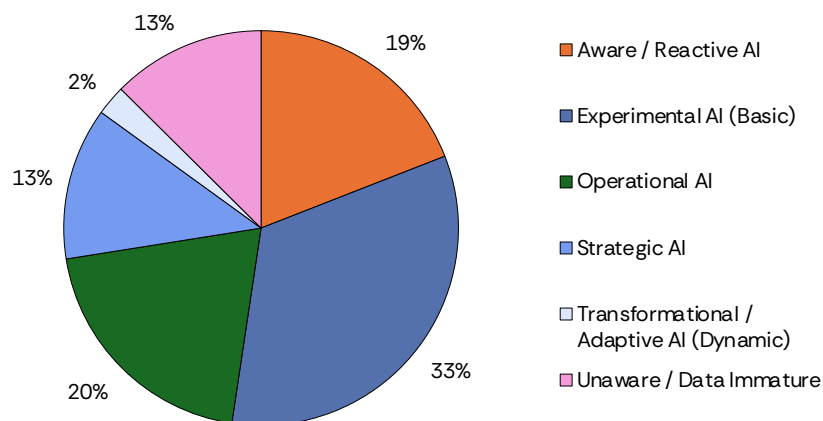


Figure 2.3.4: What level of AI solution maturity is your organization currently at within Martech?

2.4.1 From wait-and-see to experiment-and-learn

Although AI is gradually becoming the norm in Martech, 52% of users are in the early stages of AI maturity, trying to figure out how to realize value. Therefore, the landscape has transitioned from a wait-and-see stage to an experiment-and-learn stage.

2.4.2 One-third of all organizations have made significant progress in integrating AI

Some organizations have made more progress in integrating AI. Among respondents, 19% have reached the "operational" stage, which is characterized by controlled and repeatable AI use across several key functions. Another 12.5% have reached the "strategic" stage, where AI is integrated into work processes and used to support strategic decision-making. Finally, 2.5% have reached the highest level of AI maturity: "transformational," which is characterized by highly autonomous, continuously learning AI applications.

Overall, one in three organizations has progressed to at least the operational stage. However, only 15% have reached a level at which AI is strategically embedded or transformational. This distinction matters because widespread use does not necessarily translate into organization-wide value.

According to McKinsey's 2026 survey, eight in ten respondents experienced individual productivity gains from AI. However, only 37% reported a positive contribution to organizational EBIT³. Therefore, the next step in AI maturity may be less about getting more people to use AI and more about turning that use into repeatable, measurable business value.

AI use broadens as maturity increases

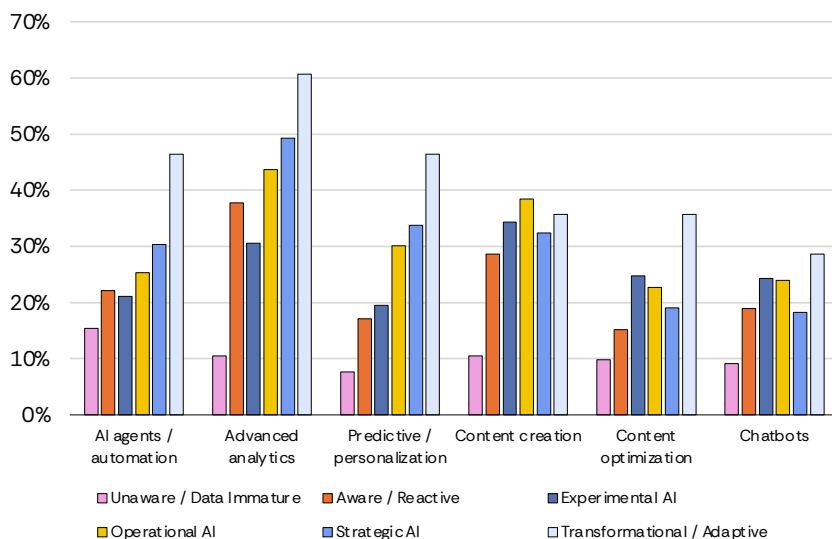


Figure 2.3.5: For what purpose are you currently using AI within Martech?

2.4.3 Mature AI use expands beyond common use cases

The differences between maturity levels become more apparent when examining how AI is used in practice. Content creation becomes common relatively early on and remains prevalent across higher maturity levels. The clearest progression, however, appears in advanced analytics, predictive personalization, AI agents, and automation. These use cases become markedly more common as maturity increases.

The continued prevalence of content creation suggests that advanced applications are added alongside accessible use cases rather than replacing them. Mature organizations are increasingly distinguished by their ability to deploy applications that depend on more than just access to technology. These applications require reliable data, integrated processes, strategic direction, and the ability to incorporate AI into everyday work. Therefore, the defining feature of AI maturity may not be whether an organization uses AI, but rather, whether it can translate AI from supporting isolated tasks into operational and strategic capabilities.

2.4.4 AI use is spreading faster than formal stack integration

AI has entered marketing workflows more quickly than tools in the Martech stack. Although 71.4% use AI in at least one Martech-related area, only 16.4% have implemented AI solutions in their stack.

This suggests that current use largely occurs through standalone tools, embedded features, and individual workflows rather than a connected Martech environment.

An additional 43.3% plan to integrate AI into their stacks within five years. If these plans are realized, the integration gap could narrow, though intentions do not necessarily translate into implementation.

Formal integration could grow — but execution remains ahead

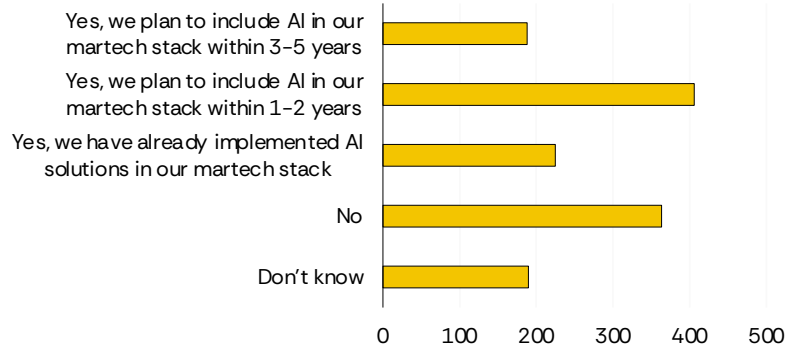


Figure 2.3.6: Current and planned integration of AI in the Martech stack

Expected effect of AI and technology on FTE levels

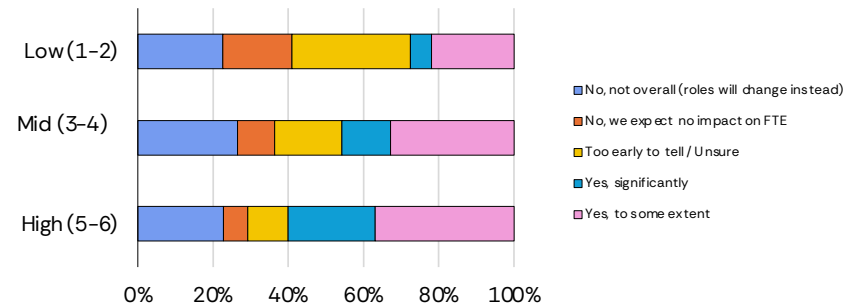


Figure 2.3.7: How do you expect AI and technology to affect FTE levels?

2.4.5 Organizations with a high level of maturity expect to reduce their workforce

As Martech maturity increases, the expectation of workforce reductions becomes more common and pronounced. 60.1% of high-maturity organizations expect a decrease in FTEs, including 23.2% who anticipate a significant reduction. The figures for low-maturity organizations are 27.5% and 5.6%, respectively.

At the same time, there is less uncertainty about roles, and the percentage expecting changes without an overall reduction remains consistent across maturity levels. These are expectations, not forecasts. The pattern suggests that organizations further along in Martech are more likely to expect that AI and technology will affect not only tasks but also workforce structures.

2.5 Although Martech budget ownership is concentrated, it has no single organizational home

The sales and marketing department is most commonly responsible for Martech budgets, cited by 37.2%. However, responsibility is also found in other areas of the organization: Strategy and Management (24.8%), Finance (22.3%), IT (18.7%), and other functions. This illustrates that, although Sales & Marketing remains the most common owner, there is no single organizational home for Martech.

In most organizations, budget responsibility is concentrated within one department. Seventy-one percent report having only one department that owns the budget, while 29% involve two or more departments. Although shared ownership is not the dominant model, it represents a significant number of organizations and offers valuable insight into the relationship between cross-functional coordination and business impact.

Number of departments	Respondents	Share
1 department	979	71,4%
2 departments	199	14,5%
3 departments	100	7,3%
4 or more departments	94	6,9%

Table 2.3.2: Number of departments involved in Martech budget responsibility.

Budget responsibility extends well beyond Sales & Marketing

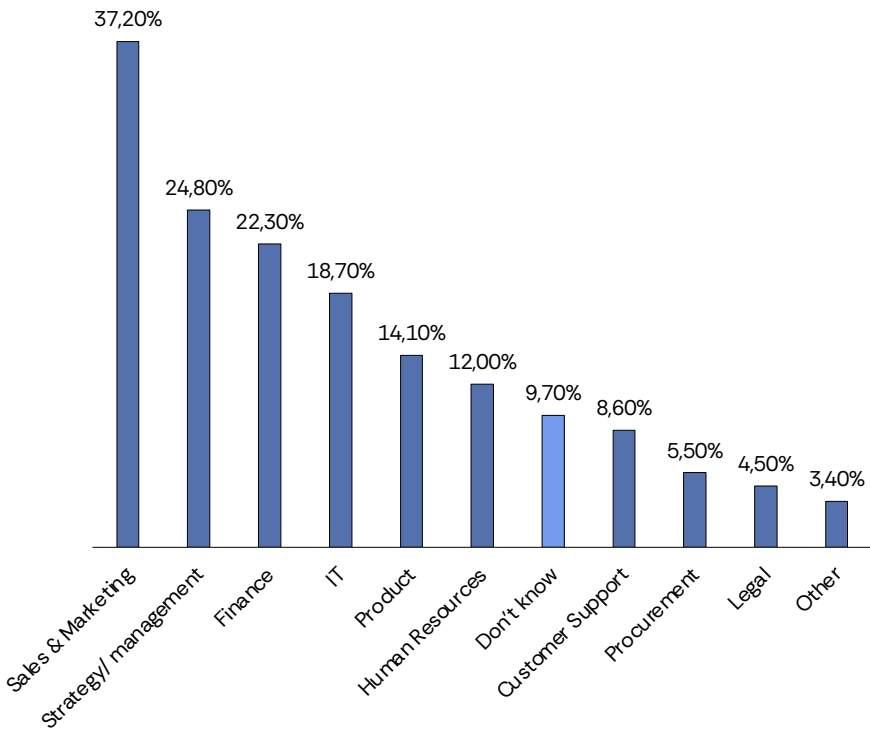


Figure 2.3.8: Where does the budget responsibility for Martech lie in your organization?

2.5.1 Broader ownership creates both value and friction

A clear pattern emerges when organizations are compared by the number of departments involved in Martech budget responsibility. Organizations with one department responsible for the budget report an average business effect of 3.51. This figure rises to 3.78 among organizations with two budget owners and to 4.01 among those with three or more. This association also holds true when accounting for company size and overall Martech maturity.

At the same time, broader ownership is associated with more reported friction in collaboration. Collaboration is among the top three challenges for 28.7% of organizations with one budget owner, 36.7% with two, and 38.3% with three or more.

The pattern reveals an intriguing paradox: broader ownership is linked to greater business value, as well as increased collaboration friction. This suggests that friction may not necessarily indicate weak business performance, but rather be a natural consequence of cross-functional value creation. In this context, success depends less on avoiding friction and more on navigating it effectively.

Reported business impact rises with broader budget ownership

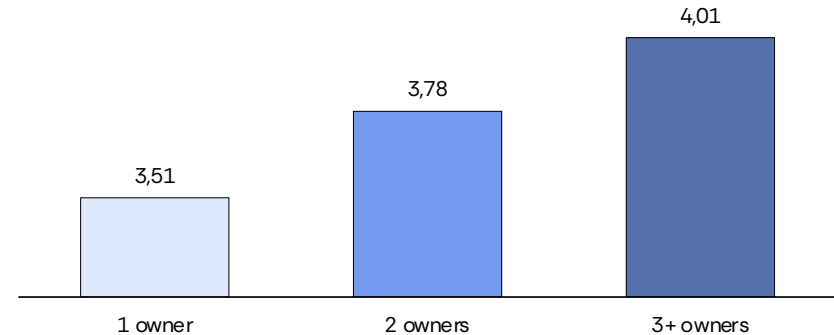


Figure 2.3.9: Average reported business impact by number of budget owners

But so does the friction...

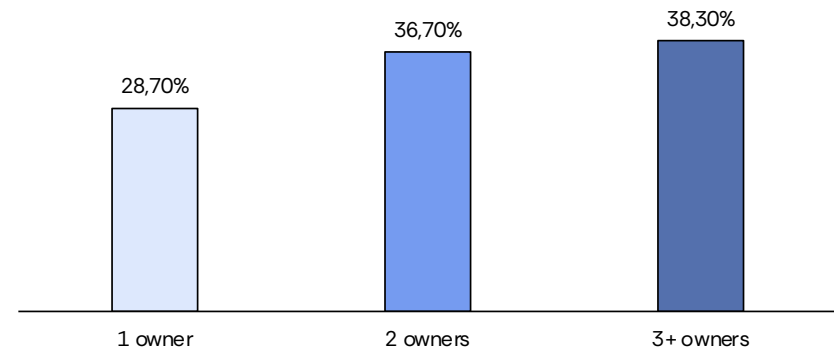


Figure 2.3.10: Collaboration as a top-three challenge by number of budget owners.

2.6 Maturity does not eliminate complexity

Over the past decade, the Martech ecosystem has grown from a relatively small set of tools to encompass more than 15,000 solutions with a much broader range of capabilities, including data, automation, content, customer experience, and, most recently, AI⁵. In order to be effective, these technologies must now cooperate across an increasing number of channels, functions, and customer journeys simultaneously.

Mature organizations tend to adopt new technology, which creates new dependencies between systems, data, processes, and teams. While developing stronger capabilities can help organizations manage these interdependencies, it does not necessarily simplify maintenance of the Martech stack.

2.6.1 The number of identified challenges rises with maturity

Rather than declining, the average number of identified challenges increases with maturity. High-maturity organizations report an average of 2.36 challenges, which is 30% more than low-maturity organizations, which report an average of 1.82 challenges. Most of the increase occurs between low- and mid-maturity organizations, while the difference between mid- and high-maturity organizations is comparatively small.

2.6.2 Having more challenges may be a sign of maturity

At first, it may seem counterintuitive that mature organizations identify more challenges. However, reported problems are not necessarily an accurate reflection of the actual number of underlying issues. Mature organizations often operate larger stacks, pursue more ambitious use cases, and coordinate work across more functions. They may also be better at detecting and diagnosing issues that less mature organizations have not yet recognized. Therefore, the data shows that complexity persists as maturity rises. The real question is how the challenges themselves change.

Mature organizations identify more, not fewer, challenges

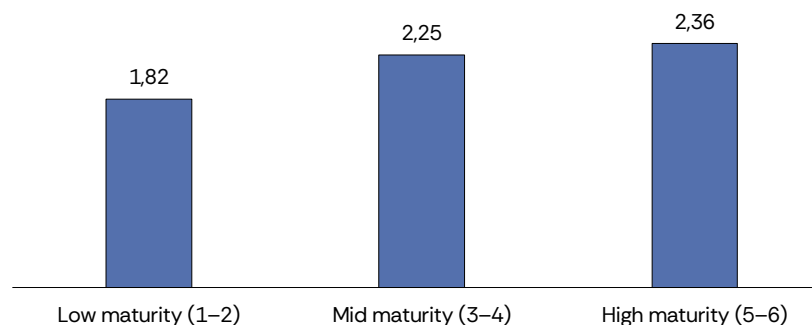


Figure 2.4.1: Functions with Martech budget responsibility.

2.6.3 Progress creates a new class of problems

As organizations progress in their Martech journey, their ambitions tend to grow. They connect more systems, activate more customer data, and coordinate work across broader teams and functions. While this enables more advanced use cases and a higher degree of customer personalization, it also creates new dependencies that must be managed.

The clearest differences between low- and high-maturity organizations are seen in collaboration difficulties (+15.0 pp) and customer data and insights (+14.6 pp). Current IT infrastructure and top management support also become more prominent.

Therefore, the challenges of Martech do not simply diminish or disappear as maturity increases. Instead, they become more interconnected and organizational in nature, placing greater demands on data quality, clear processes, and coordination across the organization.

2.6.4 Maturity shifts the challenge from capability to orchestration

Therefore, what constitutes a challenge may change as an organization matures. Less mature organizations often struggle to develop the capabilities needed to start realizing value from their Martech. Meanwhile, more mature organizations increasingly face the challenge of orchestrating those capabilities at scale. From this perspective, Martech maturity is not a state in which complexity disappears; rather, it is the ability to navigate complexity at scale.

The challenge mix shifts as maturity rises

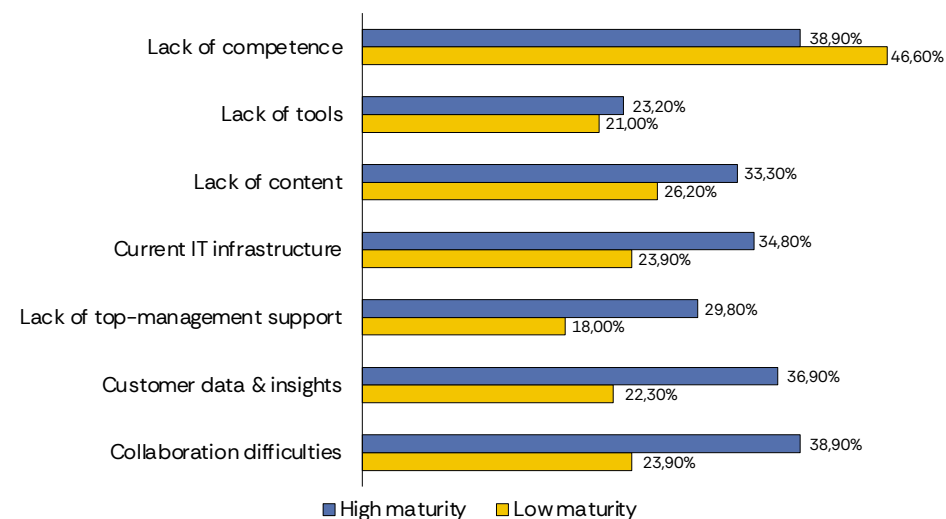


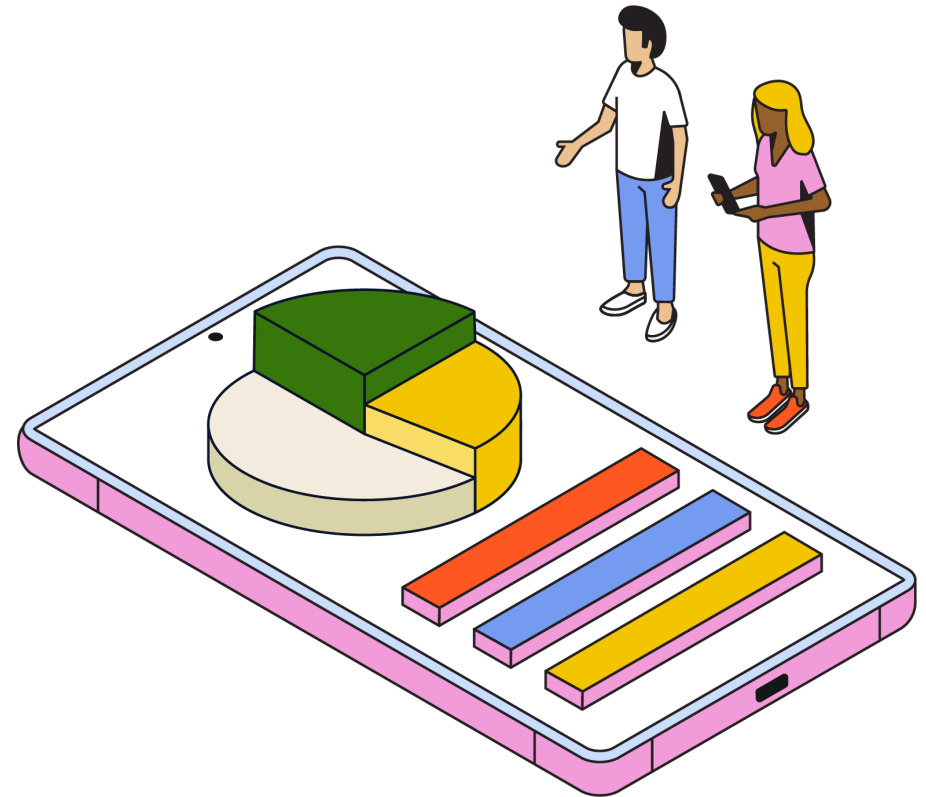
Figure 2.4.2: Share of low- and high-maturity organizations citing each area as a top-three Martech challenge.

2.6.5 Redefining the Martech leader

The findings challenge the notion that a Martech leader is merely an organization with the most advanced technology, the largest stack, or the fewest challenges. More mature organizations report stronger, broader business impacts. However, they also identify more obstacles and operate through a growing number of interdependencies.

Therefore, a Martech leader is better understood as an organization that can translate technology into repeatable business value by coordinating strategy, data, processes, personnel, and ownership. This requires identifying real constraints on progress, balancing investments across the Martech system, and establishing ways of working that enable multiple functions to contribute without losing accountability.

Leadership is not a problem-free end state. Rather, it is an organizational capacity to absorb complexity, manage friction, and adapt as technologies and business ambitions evolve. A leader is not the person facing the least complexity, but rather, the person best equipped to transform complexity into coordinated action and sustained business value.



3. How to Navigate the Martech Landscape

This section focuses on organizations that consider themselves to be at the highest Martech maturity level and explores how others can learn from them. The goal is to determine what sets this group apart by examining their previous investments, current focus, and future priorities.

3.1 The Martech leader's playbook

Martech leaders are defined as organizations that rate themselves at maturity levels 5 or 6 on a scale of 1 to 6. Of the 1,201 respondents with complete responses, 198 organizations fall into this group, representing about 16.5% of the sample. This makes the leaders a relatively distinct segment and provides a useful basis for exploring what sets the most mature organizations apart.



3.1.1 Past investments have emphasized management, data, and insight foundations

The clearest past investment pattern among leaders is not a single platform category, but rather, a broad foundation for using Martech on a large scale. The most frequently selected focus areas have been management and collaboration tools, data management, and BI/customer intelligence.

This suggests that leaders have invested in more than just channels and activation tools. They have also prioritized the infrastructure necessary for coordinating work, structuring data, and translating insights into decisions.

Past Investment Focus among Leaders

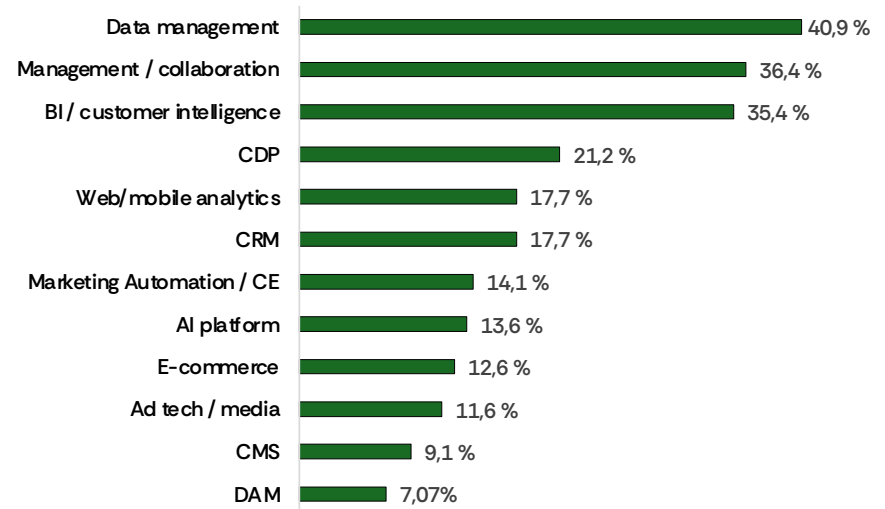


Figure 3.1: Share of Martech leader respondents selecting each technology in response to: "What Martech technology have been your main focus of investments in the previous couple of years? Choose max 3 options."

3.1.2 Leaders have invested more in customer data platforms

Examining leaders in isolation reveals where they have concentrated their investments in recent years. However, a more revealing picture emerges when they are compared with organizations at an average Martech maturity level of 3–4. This comparison reveals which investment areas are truly characteristic of the leader group rather than being common market priorities.

The clearest difference is found in customer data platforms (CDPs), where leaders demonstrate a significant positive gap compared to organizations with average maturity. Data management, business intelligence (BI)/customer intelligence, and marketing automation also stand out.

This suggests that leaders have placed a greater emphasis on building the infrastructure needed to collect, connect, analyze, and activate customer data across channels. Investments in management tools and AI platforms further indicate a focus on coordination, scalability, and advanced technology use.

Leader Delta in Past Investments

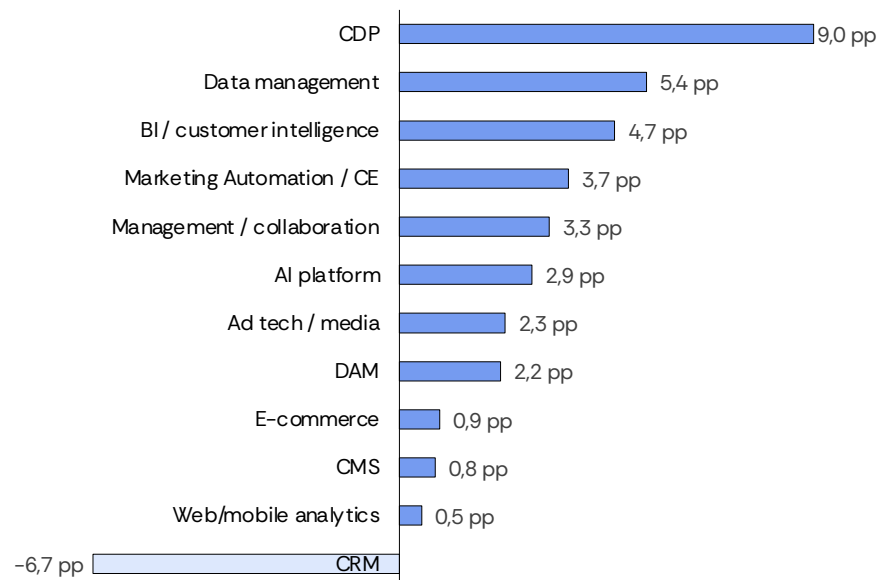


Figure 3.2: Difference in selection rates between Martech leaders and average-maturity organizations for the question: “What Martech technology have been your main focus of investments in the previous couple of years? Choose max 3 options.”

CRM is the notable exception, as it is selected less often by leaders than by the average maturity group. One possible interpretation is that more mature organizations have already established their core CRM capabilities and are therefore shifting their attention toward the layers surrounding these systems. Rather than primarily investing in basic customer management, leaders appear to be focusing on making data more accessible, actionable, and integrated across their Martech stack.

Taken together, these patterns suggest that Martech maturity is not necessarily associated with investing in more tools across the board. Rather, leaders appear to invest more selectively in capabilities that enhance connectivity, intelligence, and activation. They are shifting their focus from developing the core stack to optimizing its performance as an integrated system.

3.1.3 The current investment focus is mostly on refinement, capability-building, and new platforms

The detailed, investment-focused questions reveal that the leadership group is looking for more than just new technology. Their current agenda spans all five dimensions: strategy, people, processes, data, and technology.

The most common responses from leaders across these dimensions point to refining the existing Martech strategy, upskilling teams, improving existing processes (including automation), improving data quality, and investing in new platforms or technologies. The pattern is pragmatic: leaders are building on what already exists while also improving it.

Dimension	Top leaders' primary focus...	...and secondary focus
Strategy	Update/refine strategy (47%)	New Martech strategy (23%)
People	Upskill existing teams (46%)	Recruit specialist talents (32%)
Process	Improve processes incl. automation (46%)	Design new processes incl. automation (29%)
Data	Improve data quality/structure (39%)	Acquire new data sources (30%)
Technology	Invest in new platforms/tools (41%)	Develop/customize existing tech (32%)

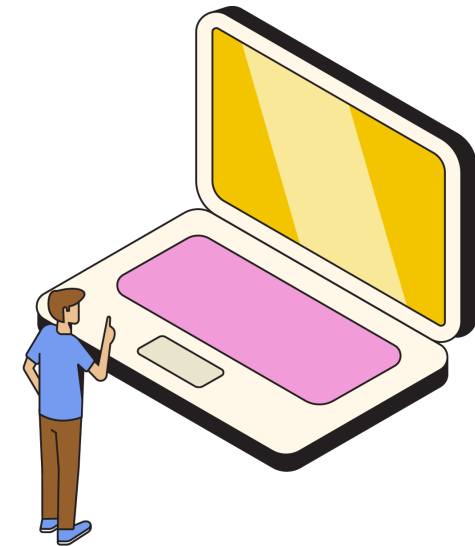
Table 3.1: Leaders' top and second most common focus across the five dimensions, based on the questions "Strategy / People / Process / Data / Technology – What is your main focus regarding investments?" The table shows the two most frequently selected focus areas among high-maturity organizations, including the share of leaders selecting each.

Dimension	Leaders' top focus	High maturity	Average maturity	Delta
Strategy	Update and refine existing Martech strategy	47 %	48 %	-1,2 pp
People	Upskill existing teams through training	46 %	41 %	+5,2 pp
Process	Analyze and improve existing processes, incl. automation	46 %	40 %	+6,3 pp
Data	Improve quality and structure on existing data	39 %	48 %	-9,5 pp
Technology	Invest in new platforms, tools or technologies	41 %	36 %	+4,9 pp

Table 3.2: Leaders' top focus across the five dimensions, based on the questions "Strategy / People / Process / Data / Technology – What is your main focus regarding investments?" The table shows the share selecting each top focus among high- and average-maturity organizations, as well as the resulting leader delta in percentage points

The clearest differences between average maturity organizations and more advanced ones are found in the data, process, and people categories. Leaders focus less on improving the quality and structure of existing data and more on automating and improving processes, upskilling existing teams, and investing in new technology. One interpretation is that leading organizations have mostly solved their data issues.

Strategy, by contrast, looks remarkably similar across the two maturity groups. This may indicate both groups realize the importance of strategy.



3.1.4 Future technology investments are shifting towards orchestration, intelligence, and AI.

The question about planned technology investments provides a clear indication of where high-maturity organizations expect to focus their attention over the next couple of years.

The strongest positive gap is in management and collaboration tools, where leaders are significantly more likely than those in average-maturity organizations to plan further investments. AI platforms follow closely behind, and there are also clear positive differences in BI/customer intelligence, data management, and CDPs.

Taken together, these priorities suggest that leaders are transitioning from individual point solutions to a more integrated Martech environment. The emphasis is increasingly on layers that help organizations coordinate activity, make data usable across the stack, and apply intelligence more systematically. AI therefore appears not as an isolated technological gamble, but as part of a broader shift toward stronger integration, decision support, and automation.

The difference in planned technology investments between highly mature and average organizations

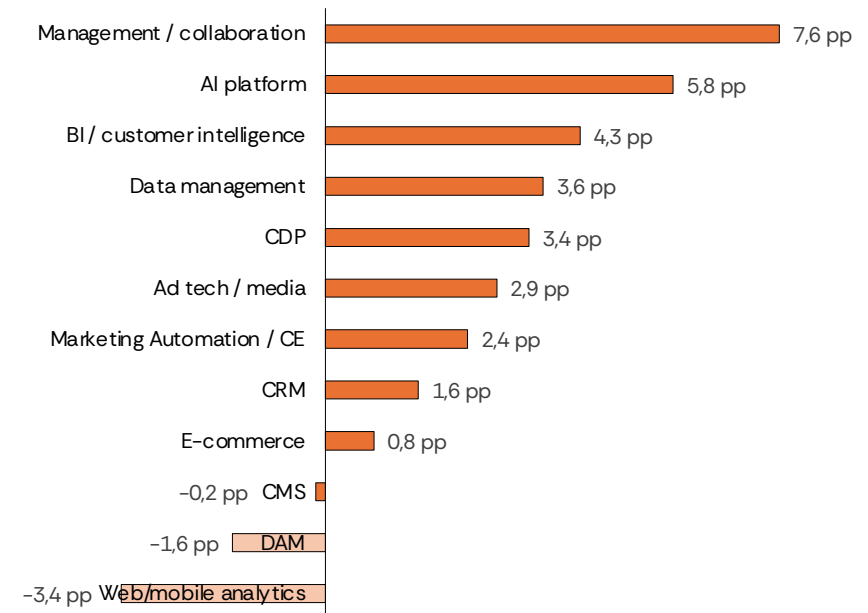
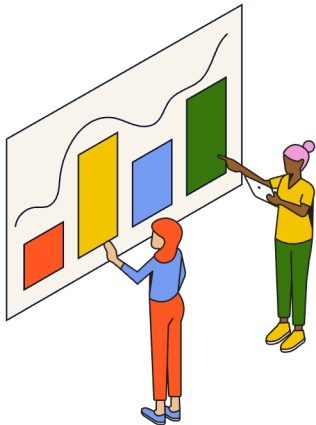


Figure 3.3: The difference in selection rate between high- and average-maturity organizations, based on the question: "What Martech technology do you plan to invest in the next couple of years? Choose max 3 options."

At the same time, the two maturity groups differ only slightly in several more established technology categories. Customer relationship management (CRM), e-commerce, and marketing automation are still important, but they are not as distinctive as leader priorities. Web analytics and digital asset management (DAM) are the only areas in which leaders are less likely than average-maturity organizations to plan investments. This may indicate that these capabilities are more established among leaders or are no longer considered a primary source of value creation.

Therefore, the pattern indicates a shift in focus rather than a general increase in technology spending. It seems that leaders are prioritizing technologies that strengthen orchestration, intelligence, and data usage across the Martech ecosystem. Management capabilities and AI are the clearest future differentiators.



3.1.5 Martech leaders are also AI leaders

Martech and AI maturity seem to be closely related. Among leaders, 55% describe their AI maturity as being in the higher tiers (operational, strategic, or transformational). This compares to 32% of organizations with average maturity and 16% with low maturity.

Current maturity of AI solutions

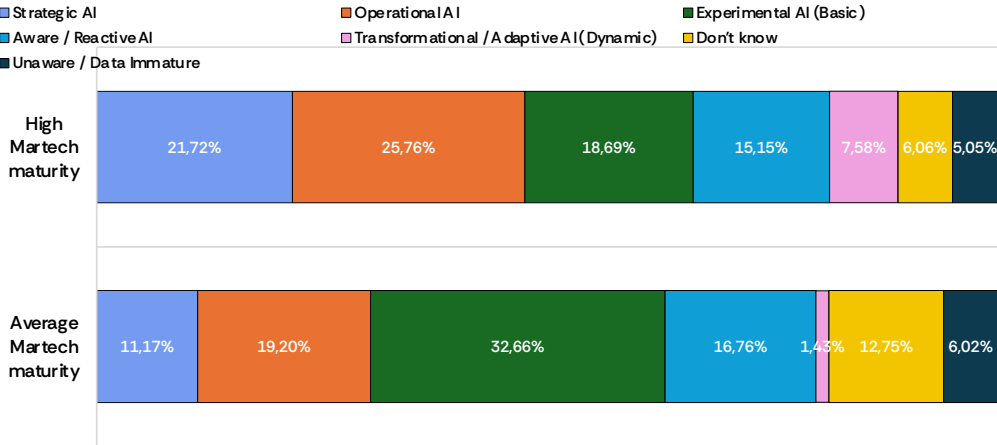


Figure 3.4: Distribution of AI maturity levels among high- and average-maturity organizations, based on the question: “What is your organization’s current level of AI solution maturity within Martech?”

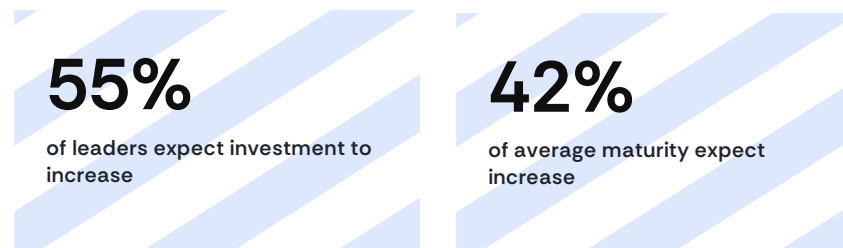
The same pattern is evident in actual adoption. Thirty-six percent of Martech leaders report having implemented AI solutions in their Martech stacks, compared to 16% of the average-maturity group and 10% of the low-maturity group. Conversely, only 7% of leaders report having no current or planned AI initiatives, compared to 19% of organizations at an average maturity level and 46% of organizations at a low maturity level.

These results suggest that leaders are not only more mature in Martech overall, but they have also progressed from AI experimentation and intentions to actual implementation and advanced use.

3.1.6 High maturity is not an end state, and leaders continue to invest

Leaders are more likely than those in other maturity groups to report that their total Martech investments will increase in the coming years. At the same time, a significant proportion of leaders anticipate maintaining their current investment level.

This is significant because it suggests that leaders view Martech as an area of continuous improvement rather than as a completed project.



Expected total Martech investments

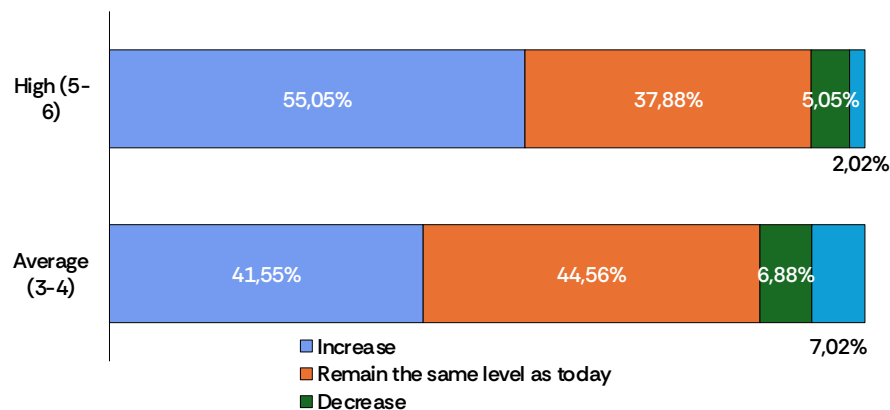


Figure 3.5: Expected change in total Martech investments among high- and average-maturity organizations, based on the question: "In total, do you predict that your organization's investments (either budget or time) in Martech over the next couple of years will ..."

3.2 In summary

According to the leader pattern, martech maturity is not primarily about owning more technology. Rather, it is about establishing the organizational and data infrastructures that enable the effective use of technology and continuing to develop them over time. Historical investment patterns suggest a greater emphasis on connecting systems, structuring data, and translating insights into action.

Leaders then shift their priorities towards refining strategy, upskilling teams, and improving processes rather than simply adding more tools.

The same pattern continues looking ahead. Leaders are placing a greater emphasis on orchestration, intelligence, and AI. Current investment plans suggest a shift from developing the core Martech stack to optimizing it as an integrated, intelligent ecosystem.

Perhaps most importantly, maturity does not appear to diminish the appetite for investment. Thus, high maturity appears less like an end state and more like an ongoing capability-building process.

The playbook: four practical moves

1. **Establish a solid foundation** – Prioritize data structure, integration and insight capabilities before adding complexity.
2. **Invest in capability, not only technology** – Upskilling, process improvement and strategic refinement remain central even at the highest maturity levels.
3. **Shift from tools to orchestration** – The next stage is about connecting the stack, improving decision-making and using AI more systematically.
4. **Treat maturity as continuous improvement** – Leaders keep investing. Martech maturity is not a completed implementation project.

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