chiefmartec MartechTribe



State of Martech 2026

with

Scott Brinker & Frans Riemersma

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Agenda

→ Marketing in Metamorphosis

→ The Martech Landscape 2026

→ Use Cases of AI in Marketing

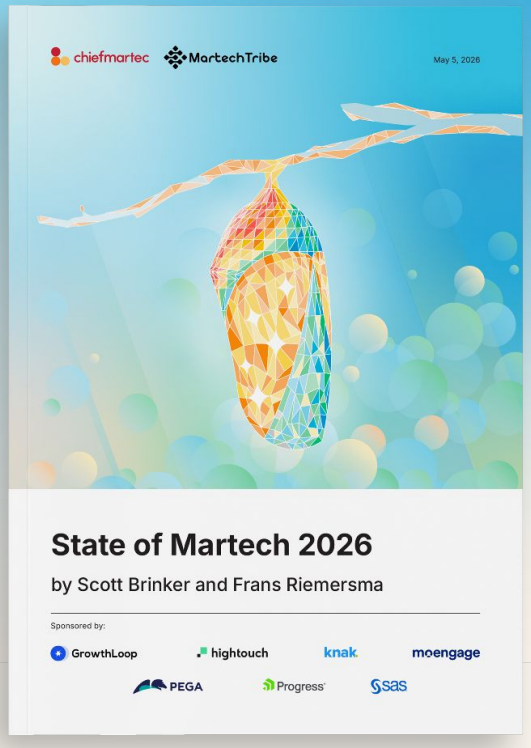
NEXT UP: Interviews



Much of what we'll cover today is compiled in our ***State of Martech 2026*** report.

- 120 pages of in-depth analysis, and insights from leading marketing technology experts
- free and ungated
- available now

You can download your copy now in the Documents tab of this event.



Sponsor Interviews



GrowthLoop

Anthony Rotio, Co-Founder & Co-CEO



hightouch

Tejas Manohar, Co-CEO



knak.

Brendan Farnand, Co-Founder and CCO



moengage

Ravi Dodda, Founder & CEO



PEGA

Tara DeZao, Sr. Director of Product Marketing



Progress

Sara Faatz, Senior Director, Community



sas

Jon Moran, Senior Marketing Manager













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RECORDING STUDIO

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CONTENT LAB

Turn long-form video into branded clips and posts—automatically with AI agents.

VIDEO HUBS

Host on-demand video hubs and track audience engagement.

Marketing in Metamorphosis



The Shape of the Transformation

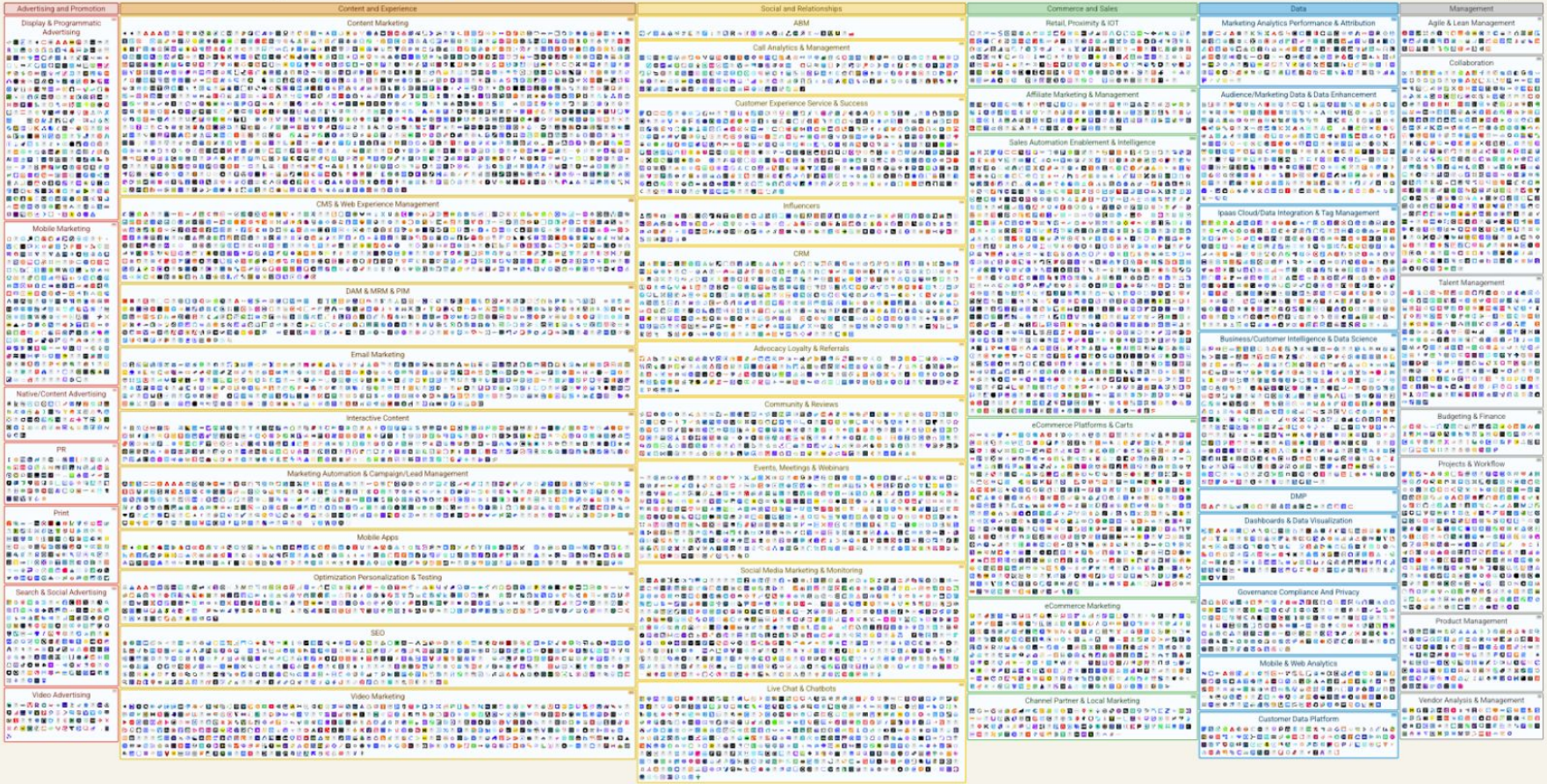
Metamorphosis	Caterpillar (where we were)	Chrysalis (where most of us are)	Butterfly (where this is heading)	
Who controls the conversation	The marketer	Increasingly, the customer	The customer's agent	Market
AI in marketing	Isolated task execution	AI everywhere, integrated nowhere	Orchestrated intelligence	Tech
Martech software	Deterministic SaaS	The great rebundling struggle	Context-as-a-Service	
Marketing roles	Campaign manager	Multimodal operator	Value engineer	Org
Marketing ops roles	System administrator	Stack wrangler	Context engineer	

The Shape of the Transformation

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MartechMap an initiative by chiefmartec & MartechTribe

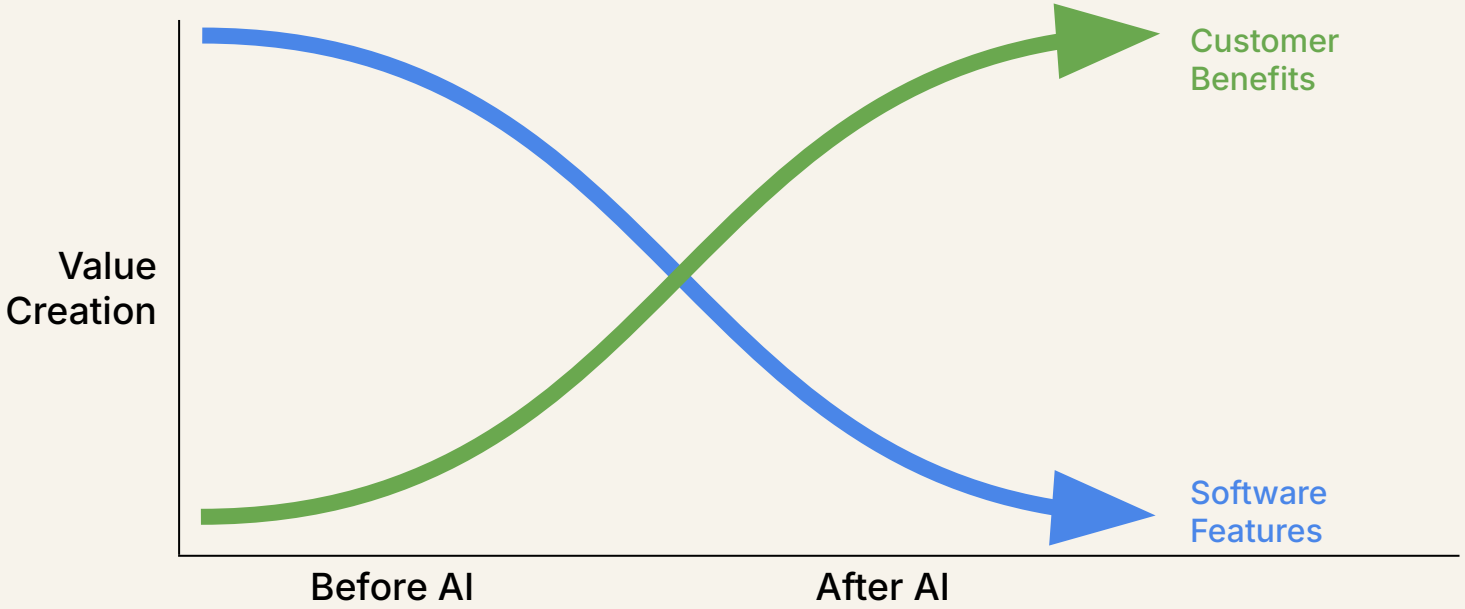
2026 Marketing Technology Landscape



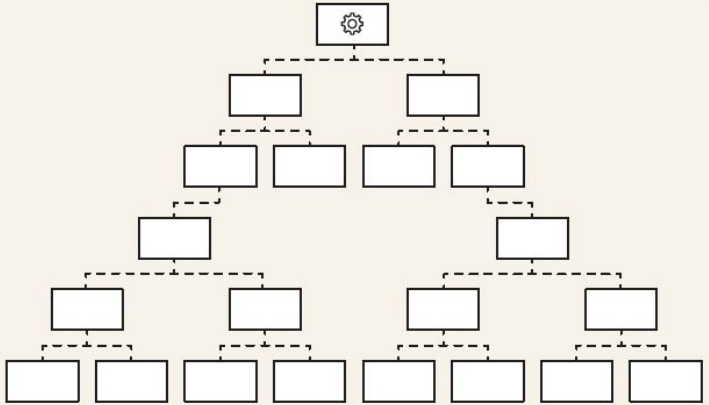
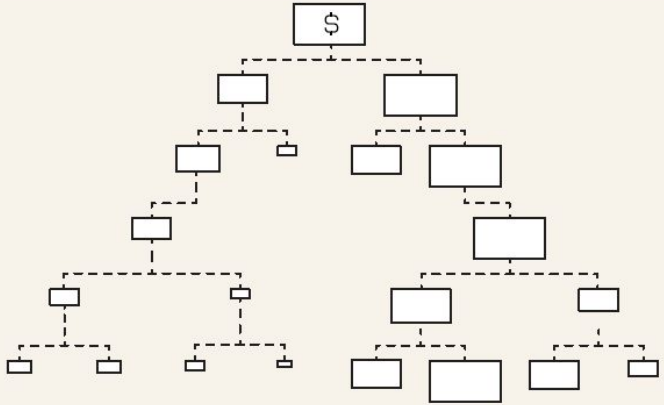
visit martechmap.com to search, sort & filter

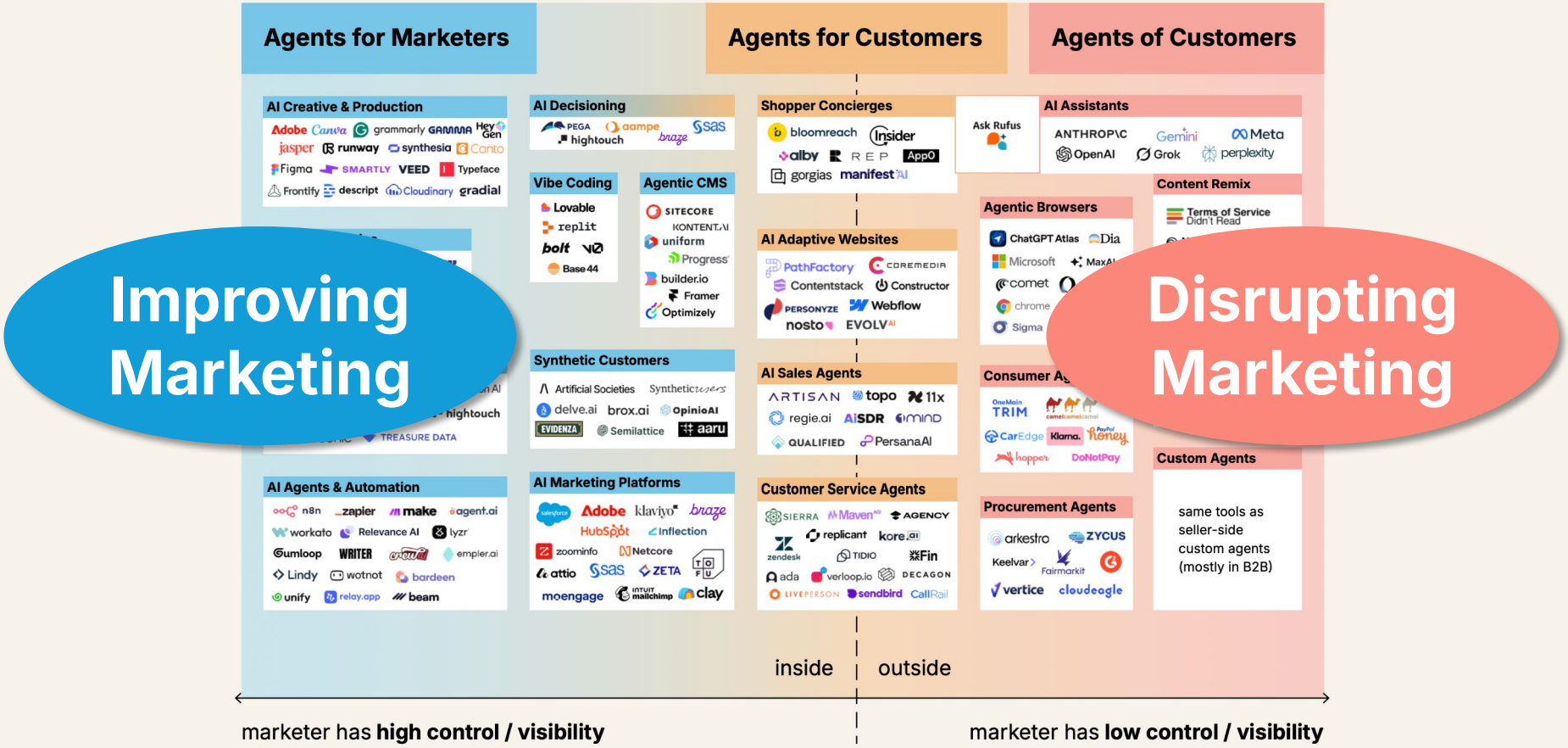
What Changed In Software?

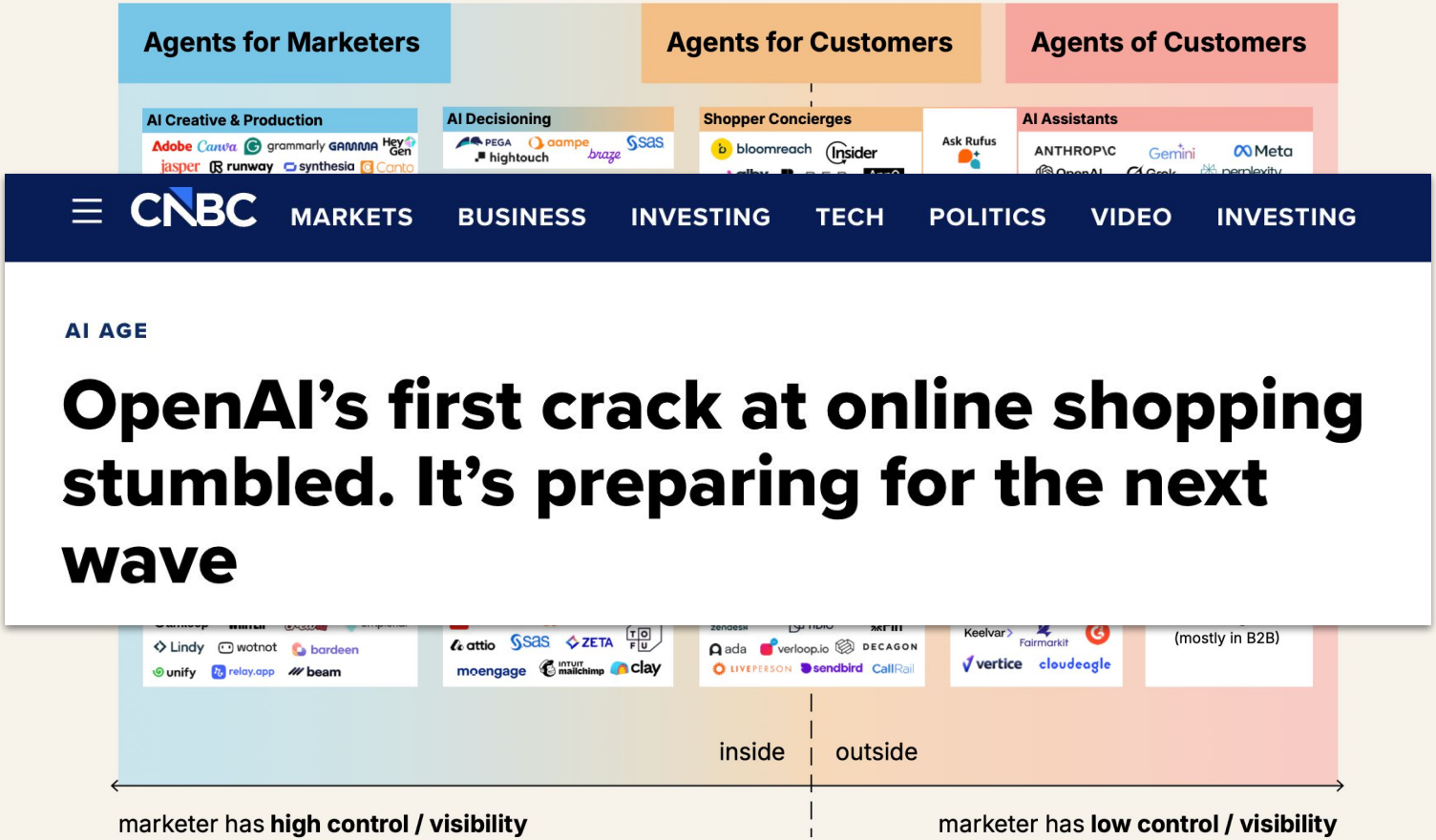
Code becomes Commodity. Customers expect Outcomes.



Do you optimize for coverage or cash?

Operational logic: How we manage our stack	**Economic logic:** How we make money
	
Stack Completeness	Value Engineering


Agents for Marketers
Agents for Customers
Agents of Customers
Improving Marketing
Disrupting Marketing
AI Creative & Production
Adobe Canva grammarly GAMMA HeyGen
jasper runway synthesia Canto
Figma SMARTLY VEED Typeface
Frontify descript Cloudinary gradial
AI Decisioning
PEGA aampe braze SAS
hightouch
Vibe Coding
Lovable
replit
bolt v0
Base44
Agentic CMS
SITECORE
KONTENT.AI
uniform
Progress
builder.io
Framer
Optimizely
Synthetic Customers
Artificial Societies Syntheticusers
delve.ai brox.ai OpinioAI
EVIDENZA Semilattice aaru
AI Agents & Automation
n8n zapier make agent.ai
workato Relevance AI lyzr
Gumloop WRITER crewAI empler.ai
Lindy wotnot bardeen
unify relay.app beam
AI Marketing Platforms
salesforce Adobe klaviyo braze
HubSpot Inflection
zoominfo Netcore
attio SAS ZETA TOFU
moengage INTUIT mailchimp clay
Shopper Concierges
bloomreach Insider
alby REP Appo
gorgias manifest AI
AI Adaptive Websites
PathFactory COREMEDIA
Contentstack Constructor
PERSONYZE Webflow
nosto EVOLV AI
AI Sales Agents
ARTISAN topo 11x
regie.ai AiSDR 6mind
QUALIFIED PersanaAI
Customer Service Agents
SIERRA Maven AGENCY
zendesk replicant kore.ai
TIDIO Fin
ada verloop.io DECAGON
LIVEPERSON sendbird CallRail
Ask Rufus
AI Assistants
ANTHROPIC Gemini Meta
OpenAI Grok perplexity
Agentic Browsers
ChatGPT Atlas Dia
Microsoft MaxAI
comet
chrome
Sigma
Consumer Ag
OneMain TRIM camelcamelcamel
CarEdge Klarna. PayPal Honey
hopper DoNotPay
Procurement Agents
arkestro ZYCUS
Keelvar Fairmarkit
vertice cloudeagle
Content Remix
Terms of Service Didn't Read
Custom Agents
same tools as seller-side custom agents (mostly in B2B)
inside
outside
marketer has high control / visibility
marketer has low control / visibility



CNBC MARKETS BUSINESS INVESTING TECH POLITICS VIDEO INVESTING

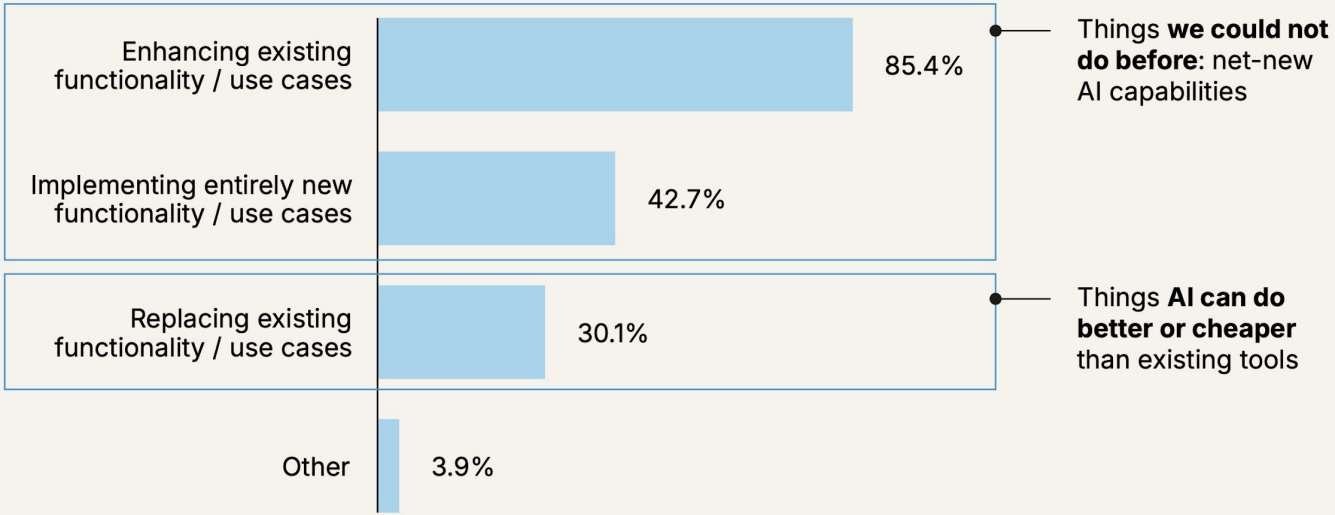
AI AGE

OpenAI's first crack at online shopping stumbled. It's preparing for the next wave

The Shape of the Transformation

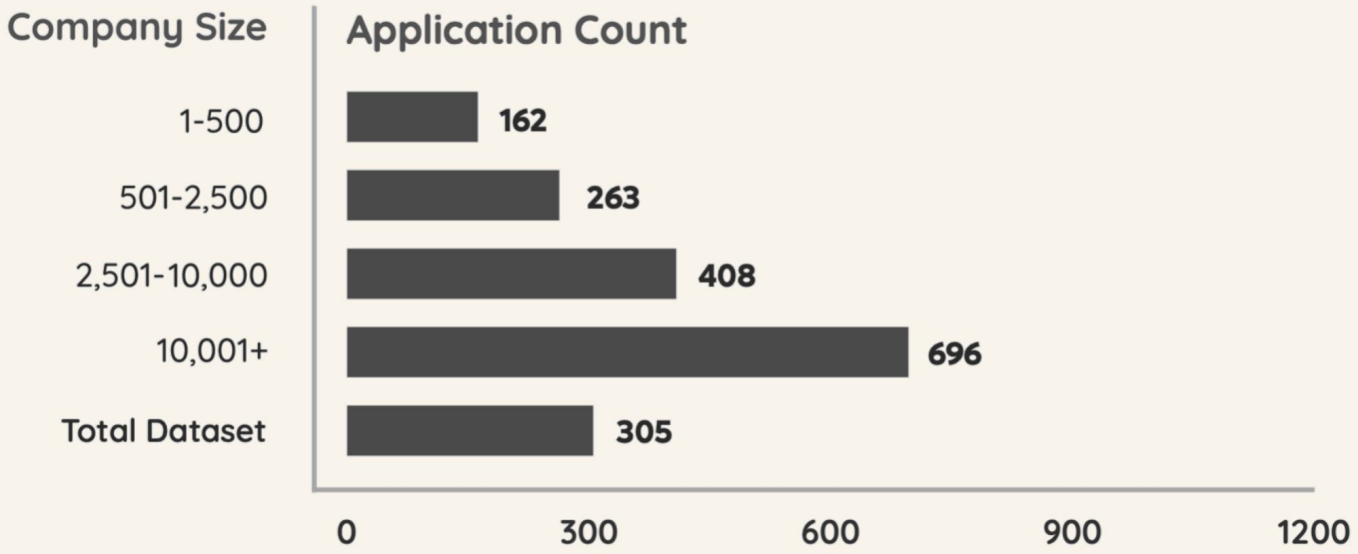
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Are AI agents replacing or augmenting martech SaaS apps?



Source: *AI & Data in Marketing Survey,* 2025, chiefmartec & MartechTribe
Respondents could select multiple options

Average # of Apps in Tech Stacks



Source: Zylo, 2026 SaaS Management Index

Personalization in the SaaS Era.



Personalization in the AI Era.



SaaS



AI Agents

The New Stack: When SaaS and when AI?

AI Agents become the value layer



SaaS becomes the infrastructure layer



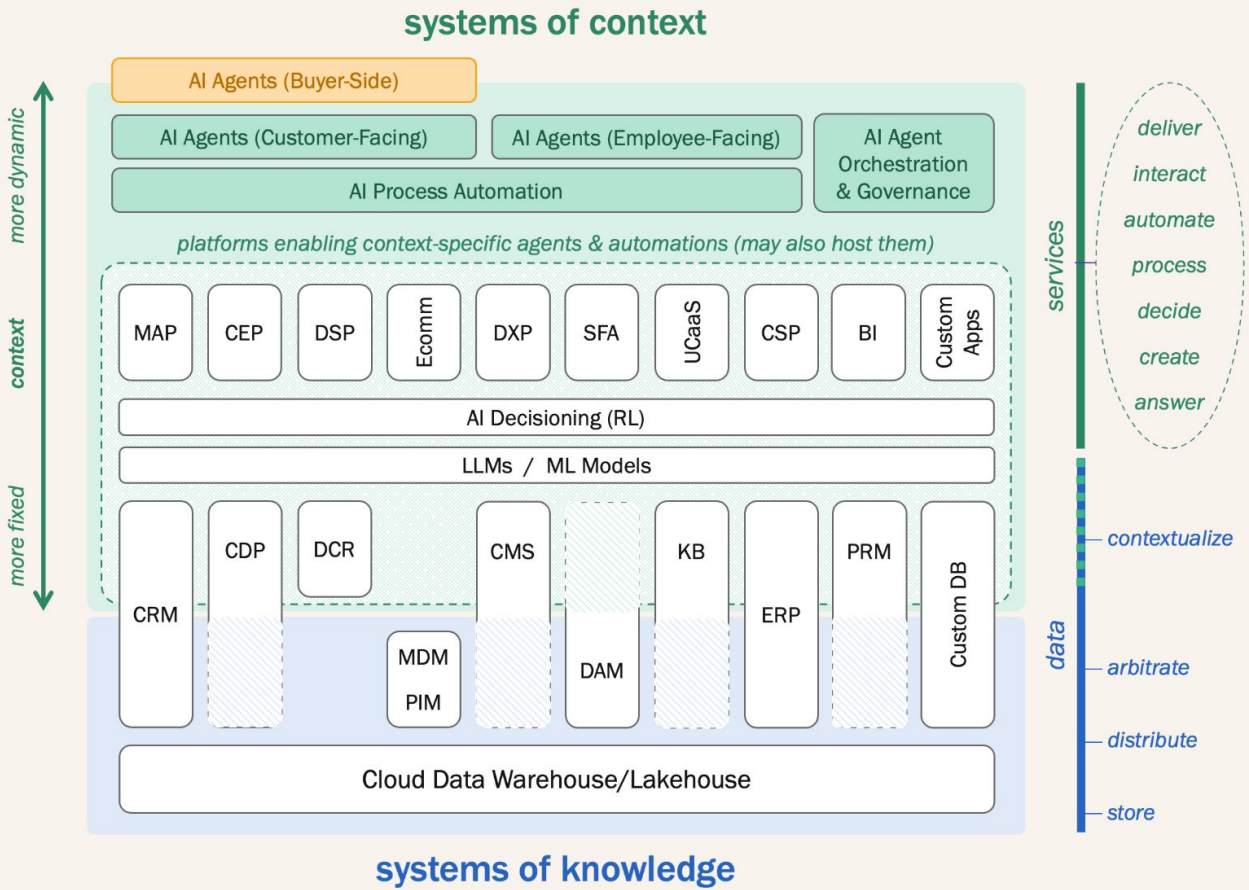
The New Stack: Combining deterministic SaaS and probabilistic AI.

Probabilistic Layer
Customer Use Case focused agents, language-driven



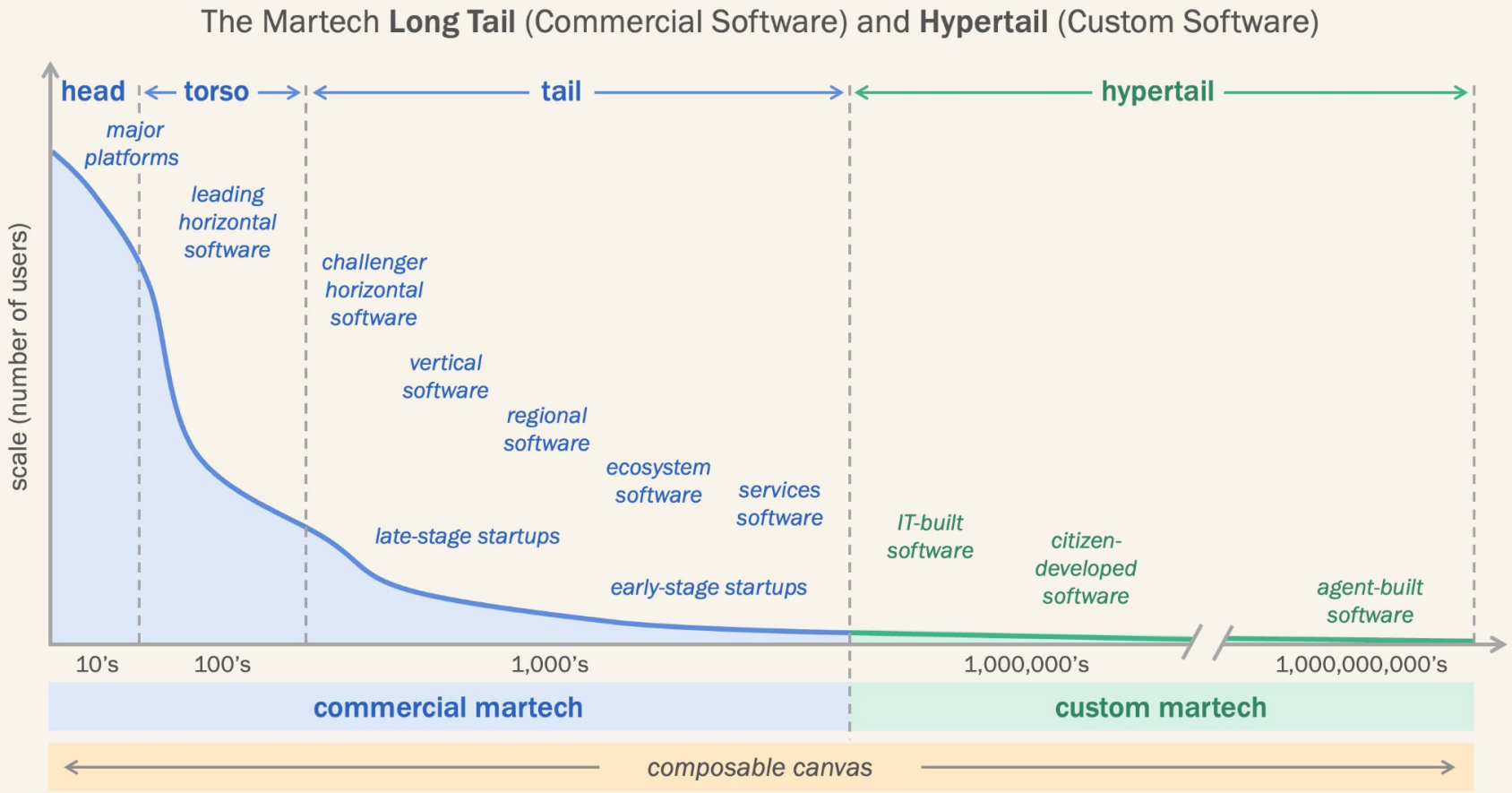
Deterministic Layer
SaaS for general purpose, rule-based





Acronym Decoder Ring

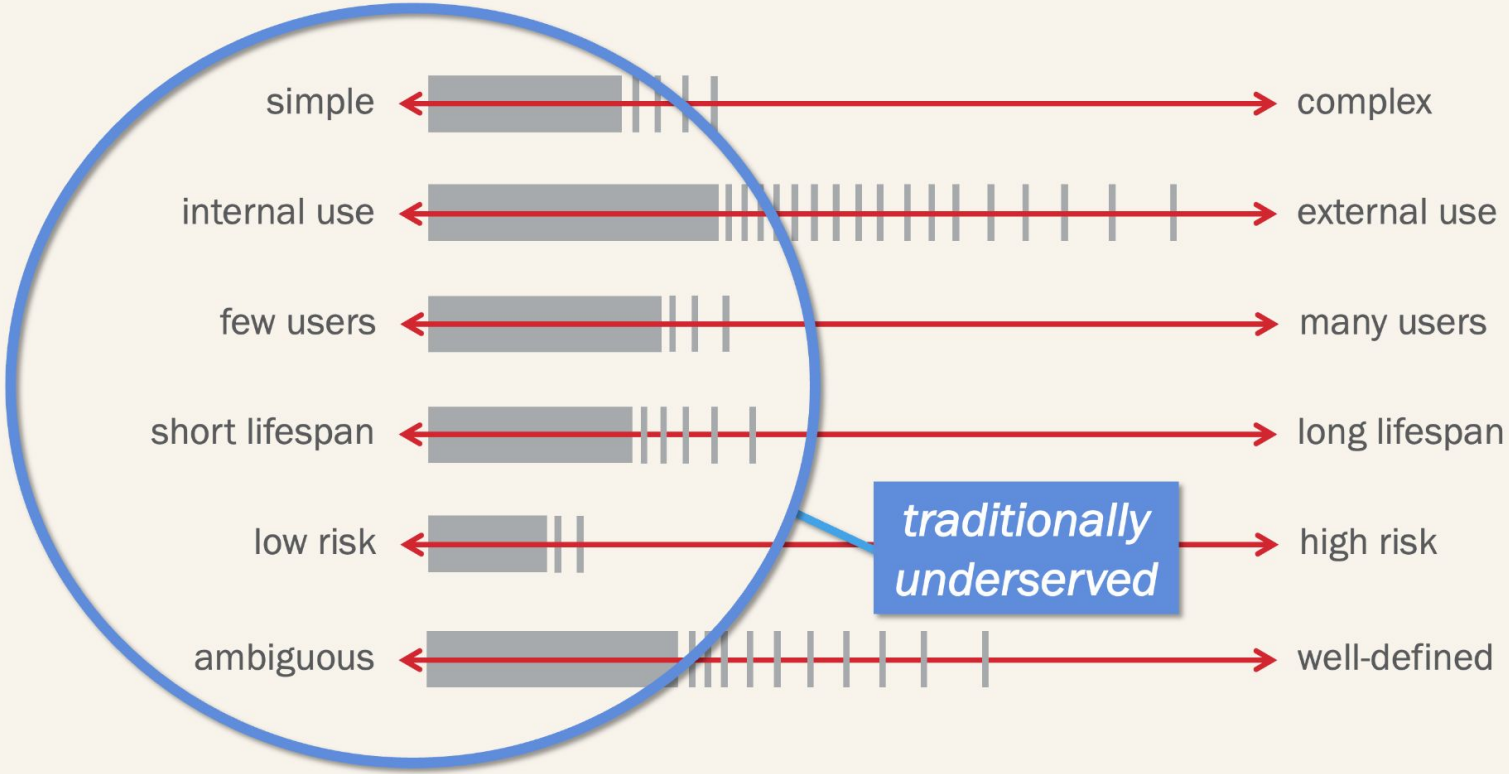
AI	Artificial Intelligence
MAP	Marketing Automation Platform
CEP	Customer Engagement Platform
DSP	Demand-Side Platform (advertising)
DXP	Digital Experience Platform
SFA	Sales Force Automation
UCaaS	Unified Communications as a Service
CSP	Customer Success Platform
BI	Business Intelligence
RL	Reinforcement Learning
LLM	Large Language Model (e.g., GPT-4)
ML	Machine Learning
CRM	Customer Relationship Management
CDP	Customer Data Platform
DCR	Data Clean Room
MDM	Master Data Management
PIM	Product Information Management
CMS	Content Management System
DAM	Digital Asset Management
KB	Knowledge Base
ERP	Enterprise Resource Planning
PRM	Partner Relationship Management
XTC	New Wave Band
DB	Database

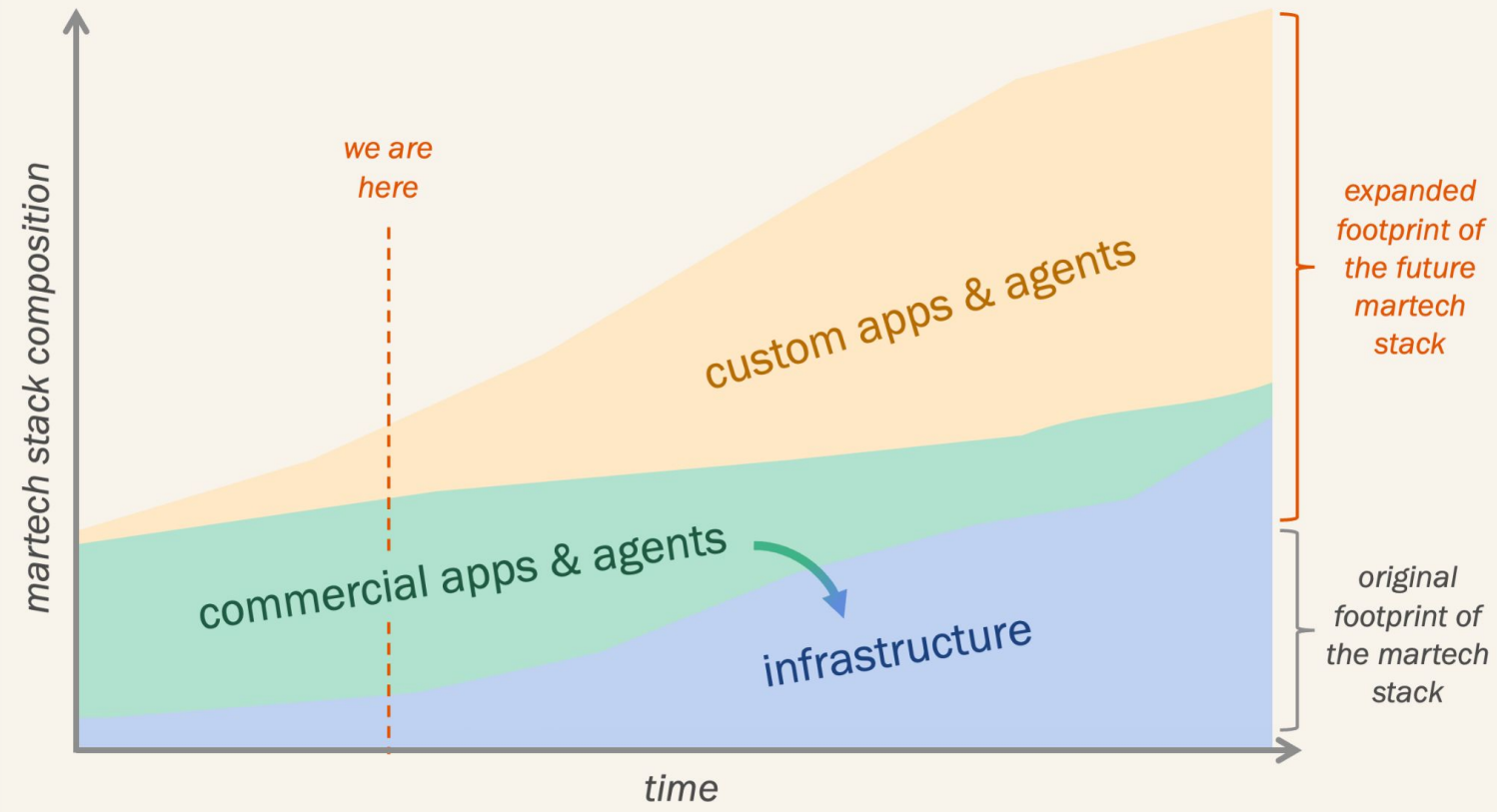

The Martech Long Tail (Commercial Software) and Hypertail (Custom Software)
head
torso
tail
hypertail
major platforms
leading horizontal software
challenger horizontal software
vertical software
regional software
ecosystem software
services software
late-stage startups
early-stage startups
IT-built software
citizen-developed software
agent-built software
scale (number of users)
10's
100's
1,000's
1,000,000's
1,000,000,000's
commercial martech
custom martech
composable canvas

What use cases are ideal for “vibe coding”?



What use cases are ideal for “vibe coding”?

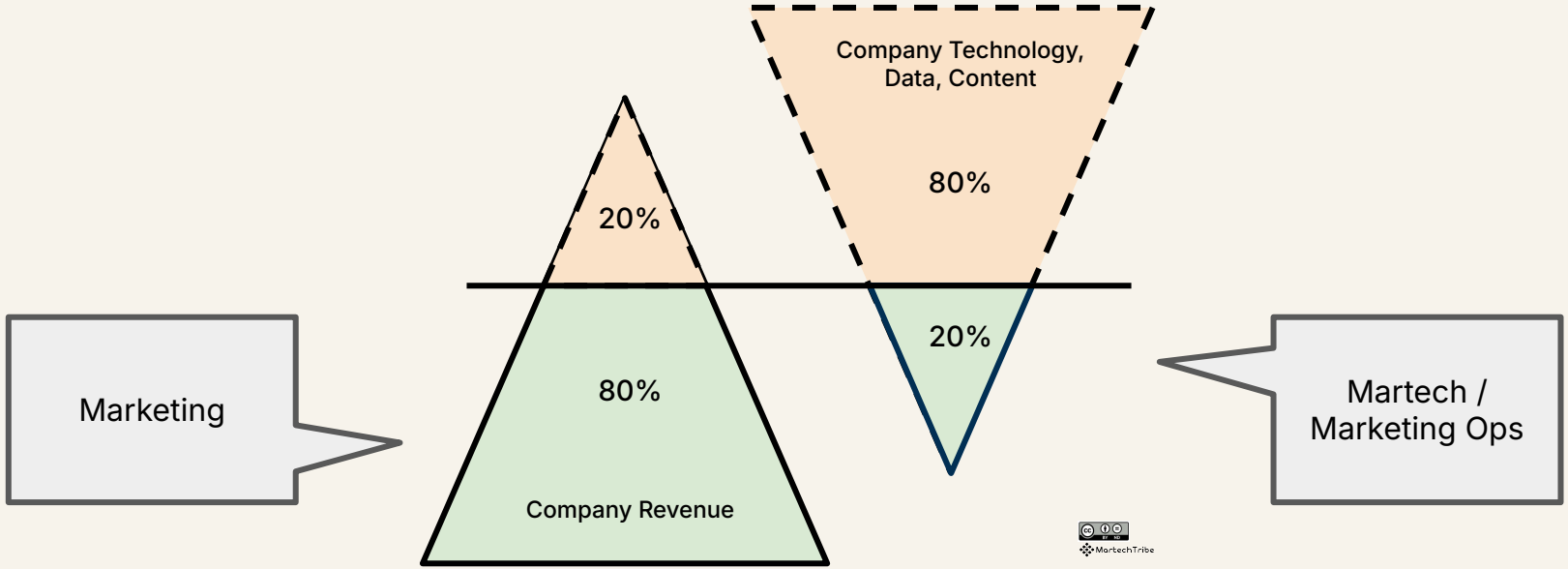



martech stack composition
we are here
custom apps & agents
commercial apps & agents
infrastructure
expanded footprint of the future martech stack
original footprint of the martech stack
time

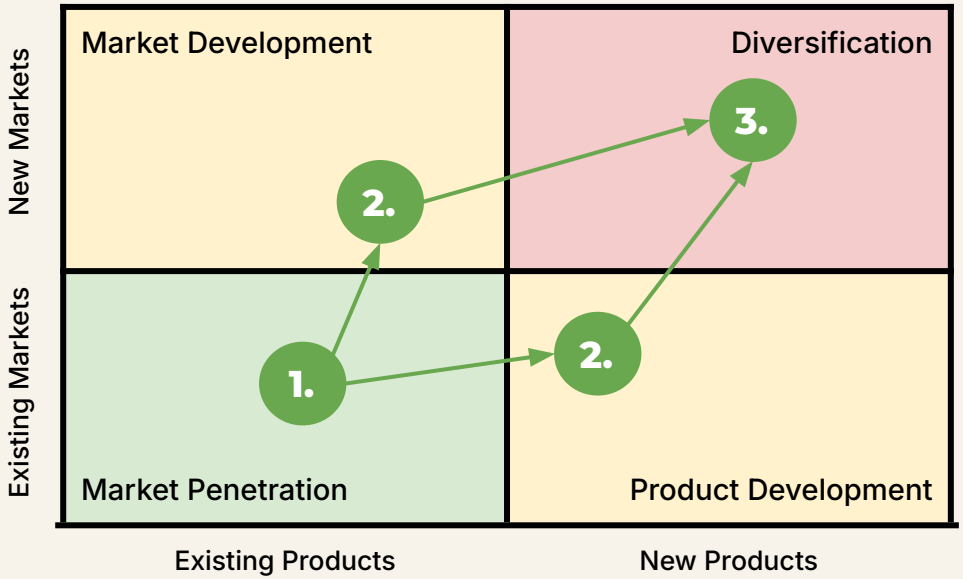
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~20% of Data Drives 80% of Company Revenue. But which 20%?



But which 20%? Start with your current revenue (customer).



Source: Ansoff matrix

Two Rules of Value Engineering.

1. Every customer is proven revenue

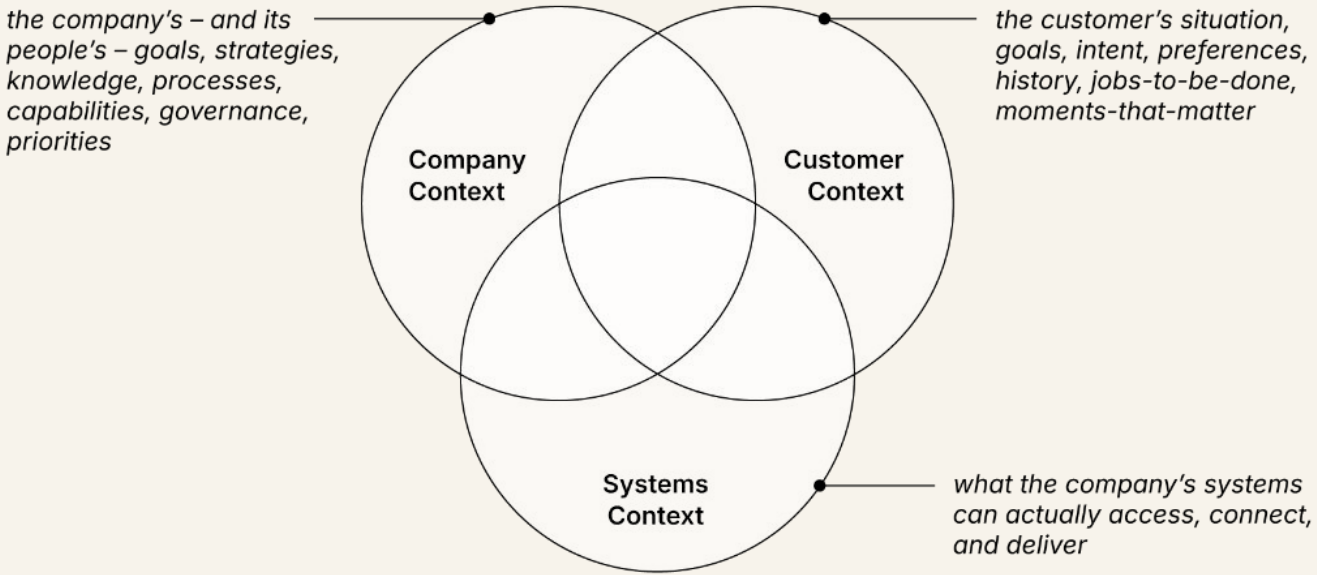
2. Every customer once was a lead

Reverse-engineer your revenue. Answer Three Questions.

1. Who is our biggest customer?
2. What product or service do they buy most?
3. What is the margin?

Most marketers cannot answer these questions!

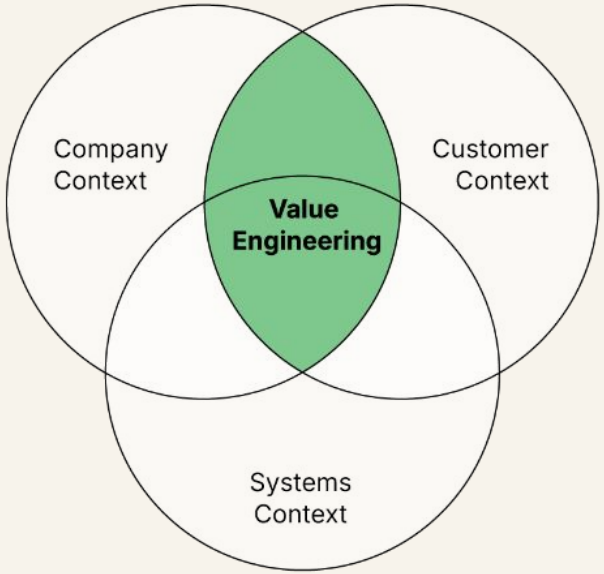
The Three Contexts of Marketing



Value Engineering

Value engineering reverse-engineers from outcomes. It's the who, what, and why of marketing — positioning, segmentation, messaging, and go-to-market strategy.

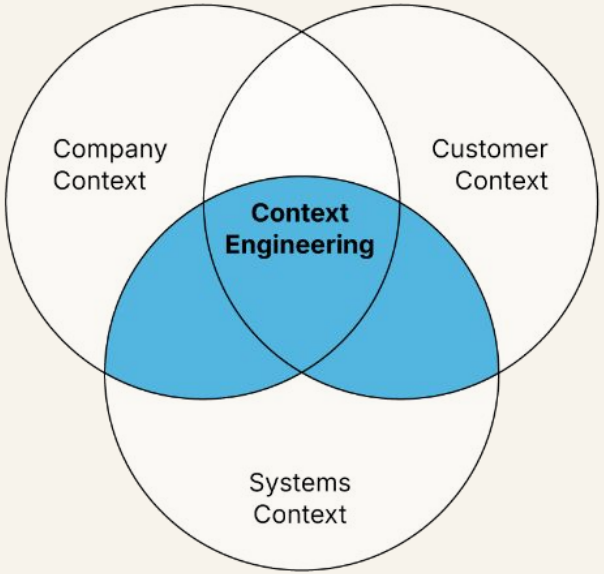
When done well, it concentrates resources on the customers and journeys that matter most, rather than optimizing for activity across the board.



Context Engineering

Context engineering figures out how to deliver.

Context engineering covers the overlap between systems and the other two circles. It's where company knowledge becomes machine-readable and customer understanding becomes actionable.

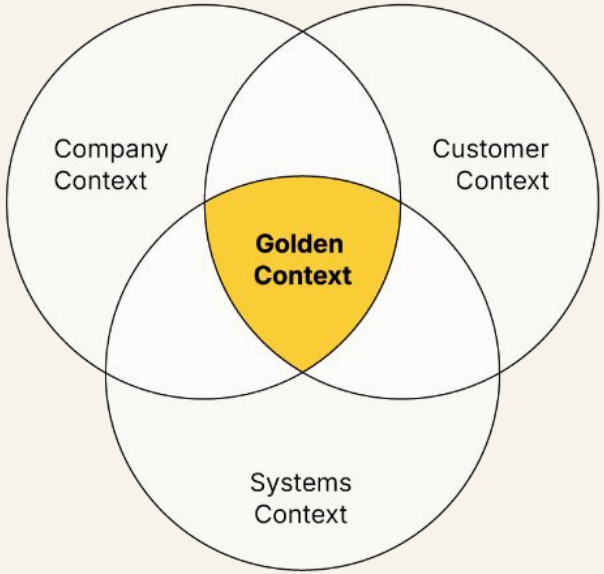


Golden Context

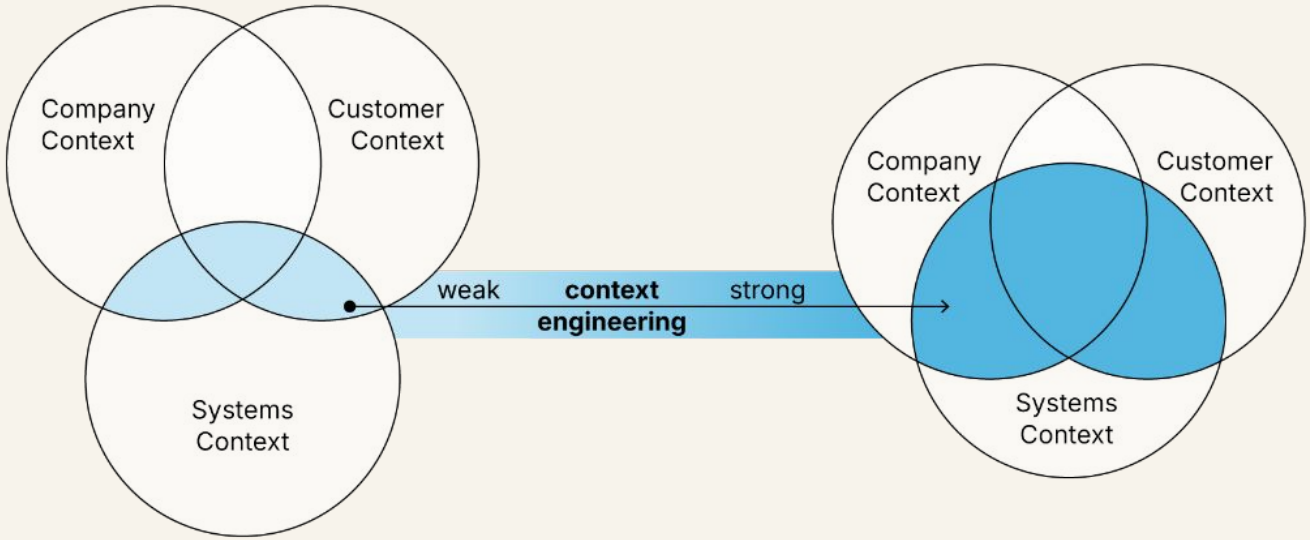
The triple intersection is what we call Golden Context.

It's the moment when the company's goals and capabilities, the customer's needs and situation, and the systems' ability to connect and deliver all align perfectly.

These are the moments where revenue is generated.



Closing the Context Gap > More Value

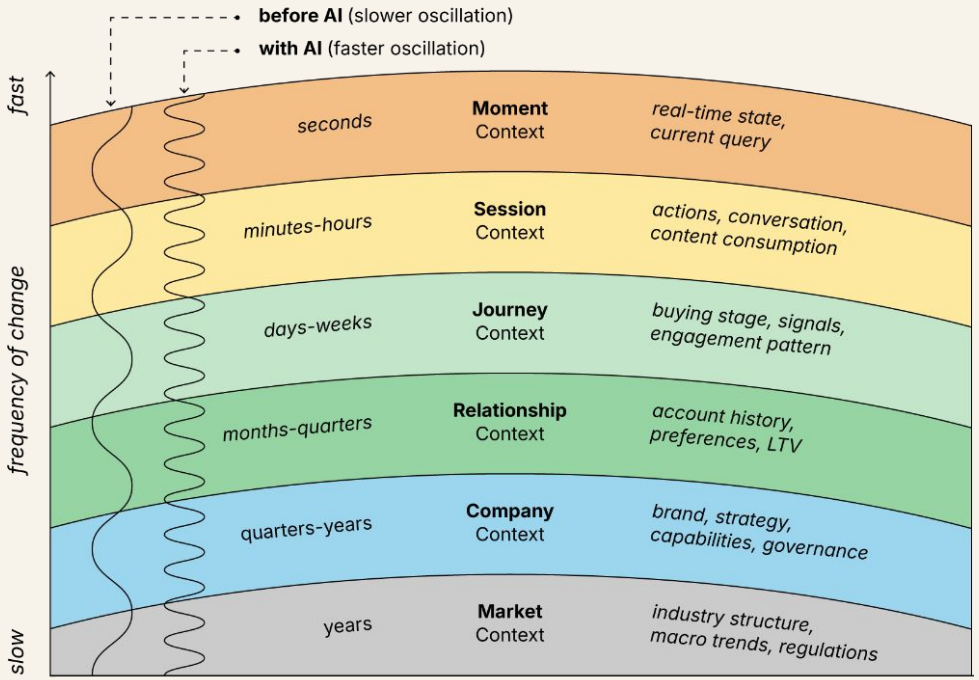


From Low performance

To High performance

Context Stack Pace Layers

Borrowing from Stewart Brand's pace layers model — where slow-moving layers like culture and governance stabilize fast-moving ones like commerce and fashion — context in marketing operates across multiple time scales simultaneously.



The Martech Landscape 2026



A Special Thanks

Beste Akkaya in Turkey

David Blackburn in the USA

Dunja Riehemann in Germany

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Gerben Busch in the Netherlands

James Schlesinger in the UAE

Jim Groo in Switzerland

Johannes Schulz in Germany

Jordie van Rijn in the Netherlands

Kristina Huddart in the United Kingdom

Małgorzata Marcinkowska in Poland

Michael Klazema in the Netherlands

Niels van Meerte Janse in the Netherlands

Odd Morten Sørensen in Norway

Reynier Matos Padilla in the USA

Sean Broderick in Ireland

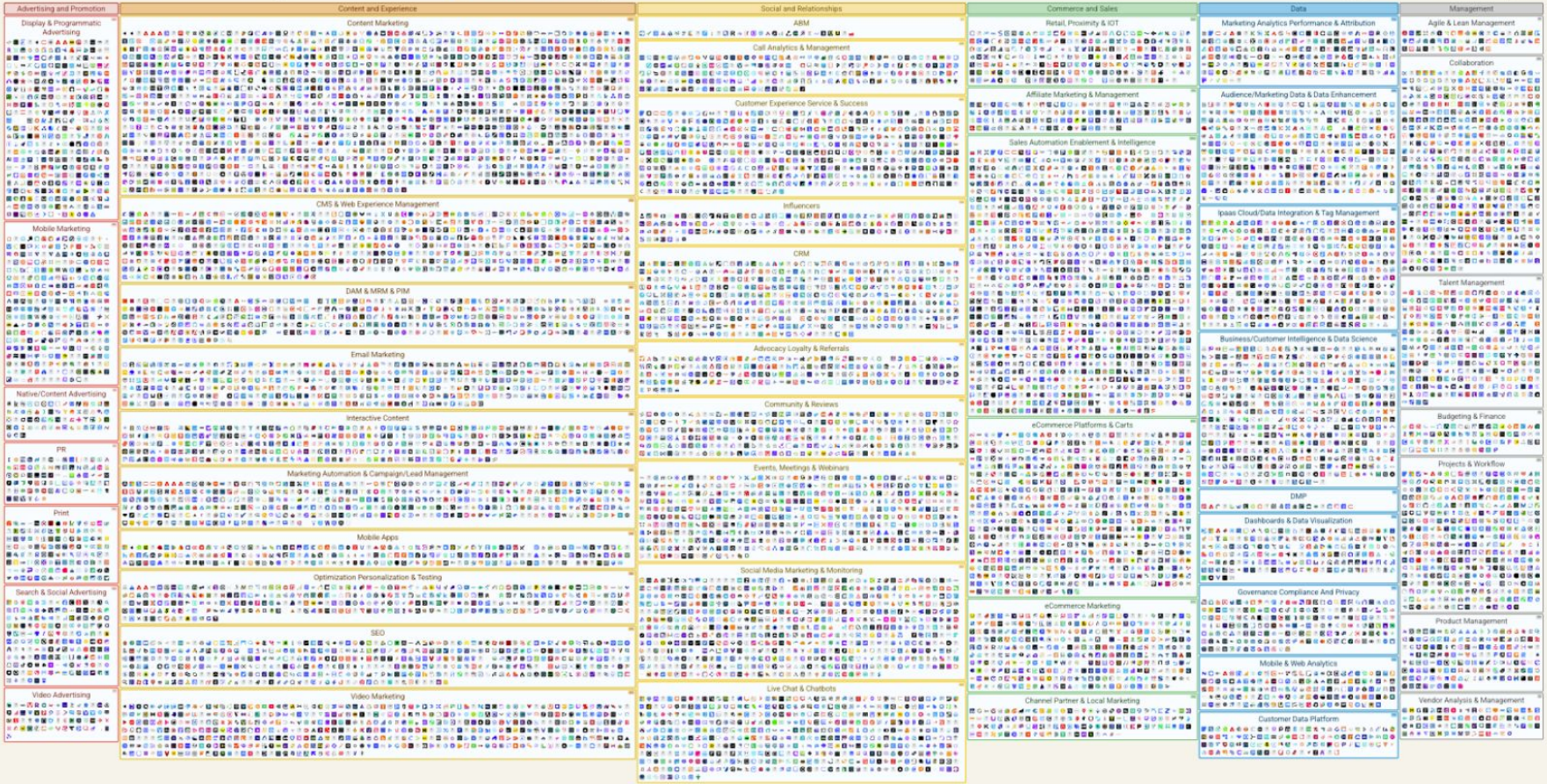
Sinan Günal in Canada

Stefania Massenza in Italy

Yogita Wadhwa in India

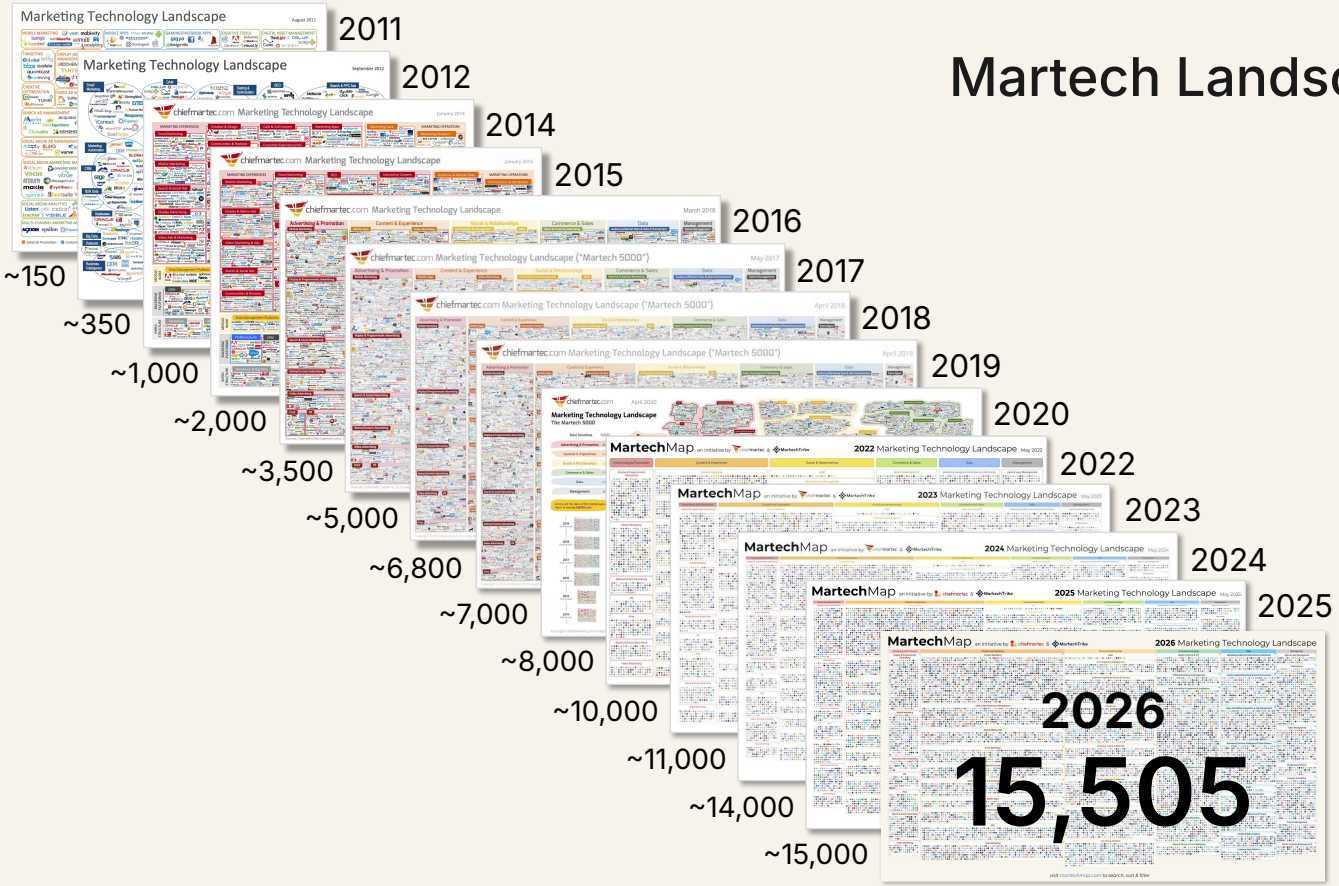
MartechMap an initiative by chiefmartec & MartechTribe

2026 Marketing Technology Landscape



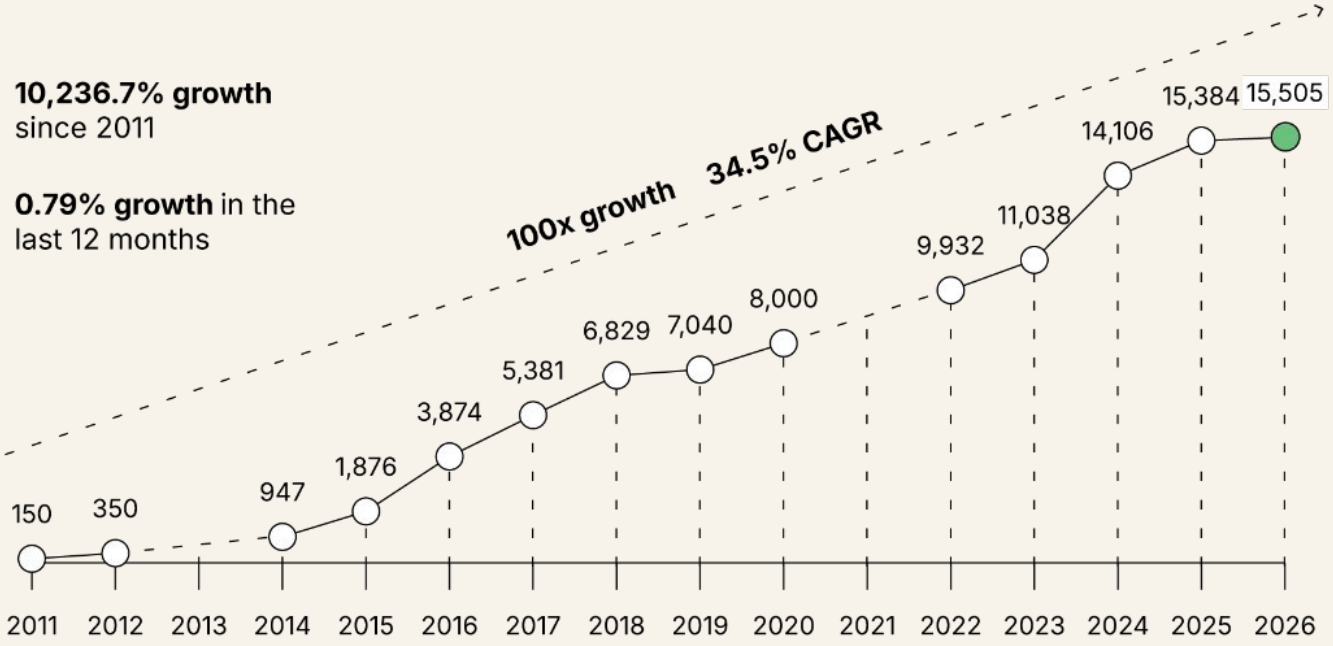
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Martech Landscape 2011-2026



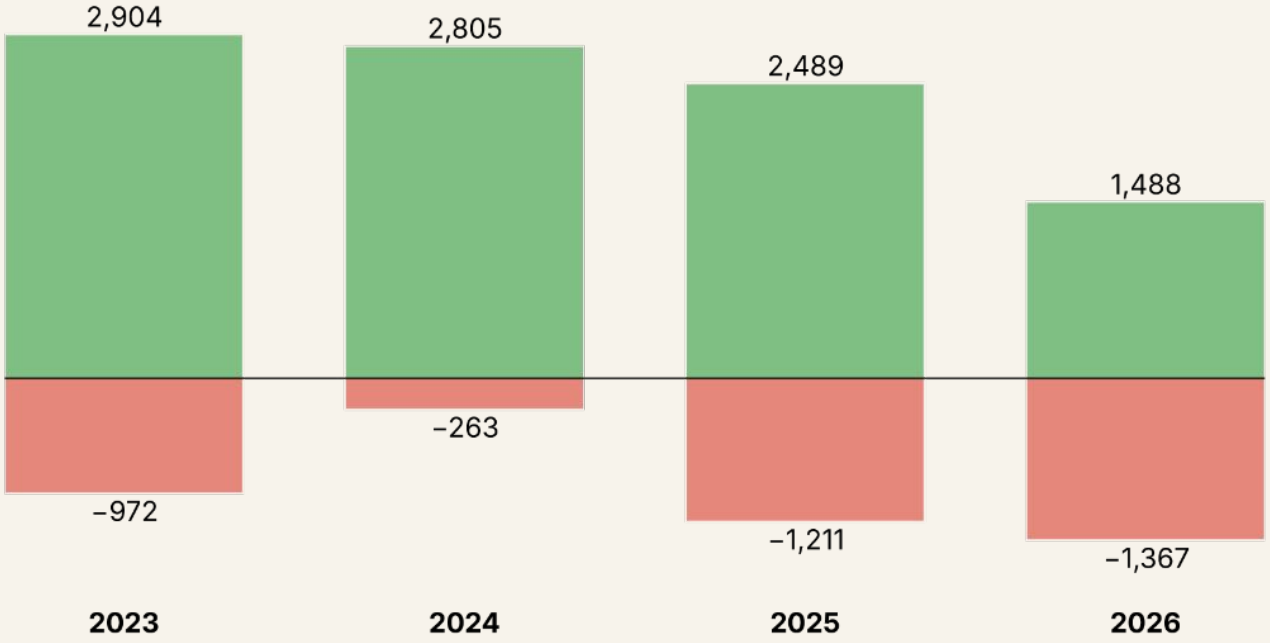
Source: MartechMap Research, chiefmartec & MartechTribe

Number of Martech Software Apps Since 2011



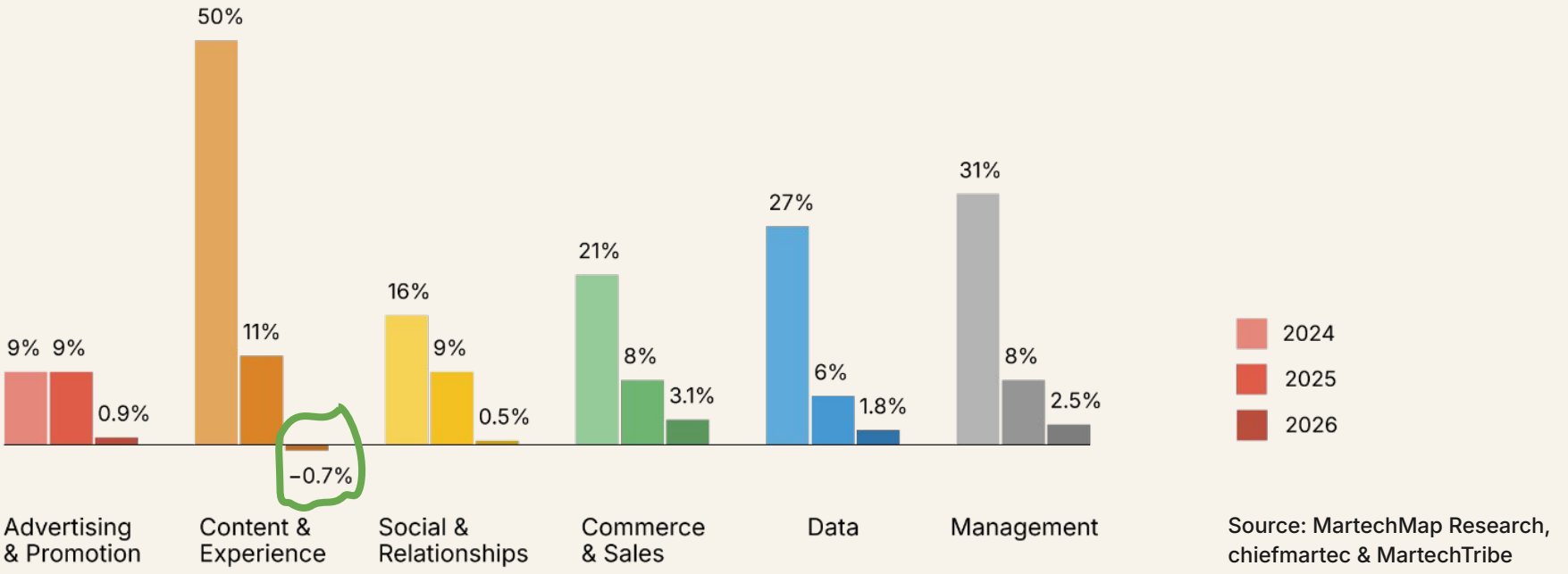
Source: MartechMap Research, chiefmartec & MartechTribe

Martech Landscape: Products Added and Removed by Year



Source: MartechMap Research, chiefmartec & MartechTribe

Martech Growth Rates
by Year



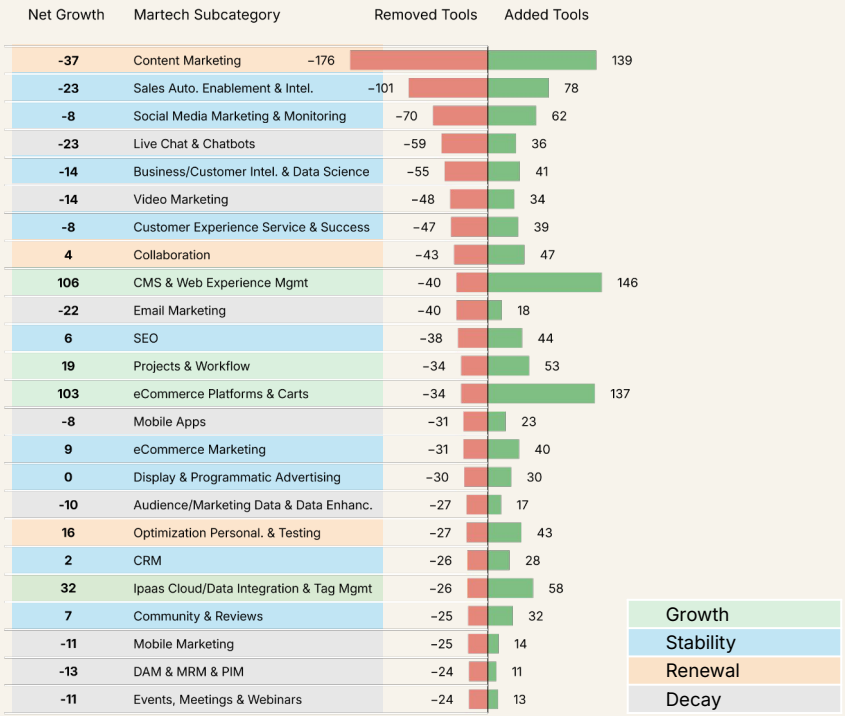
Source: MartechMap Research, chiefmartec & MartechTribe

The MartechMap as a Market Thermometer

	low outflow	high outflow
high inflow	**Growth** *Classic expansion. Category is still attracting new entrants and not shedding the old ones.*	**Renewal** *Active creative destruction. New ideas arriving faster than old ones can exit, but the old guard is definitely exiting.*
low inflow	**Stability** *Mature, settled categories. Not growing fast, not losing ground. Equilibrium.*	**Decay** *The signal of a category in structural decline. Entrepreneurs don't see opportunity; investors aren't funding; old players are exiting without being replaced.*

Martech Net Change

Top 24 Martech categories

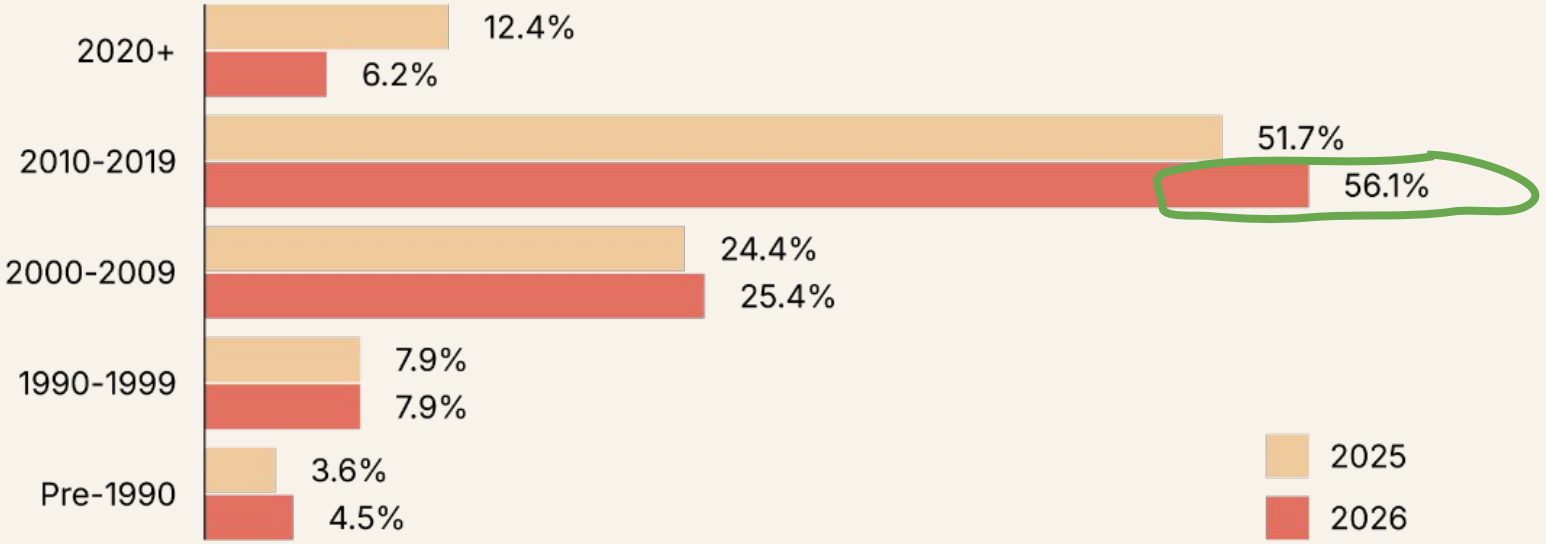


Key takeaways:

1. Growth: (n=4)
   CMS, Project & Workflows, eCommerce, and iPaaS
2. Renewal: (n=3)
   Content, Collaboration and Personalization
3. Stability: (n=9)
4. Decay: (n=8)

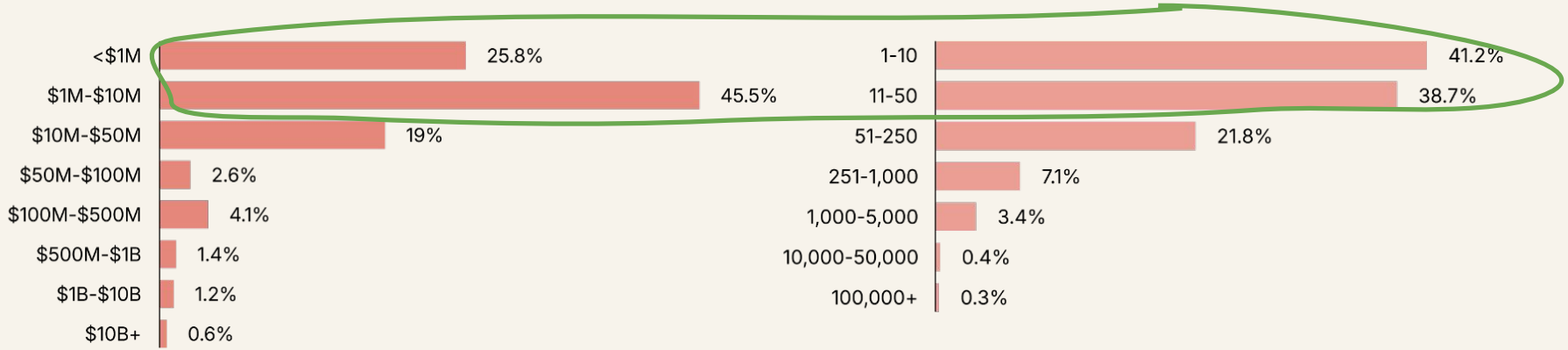
Source: MartechMap Research, chiefmartec & MartechTribe
Ranked by number of tools removed.

Martech Removed
by Year Founded



Source: MartechMap Research, chiefmartec & MartechTribe

Martech Removed
by Revenue



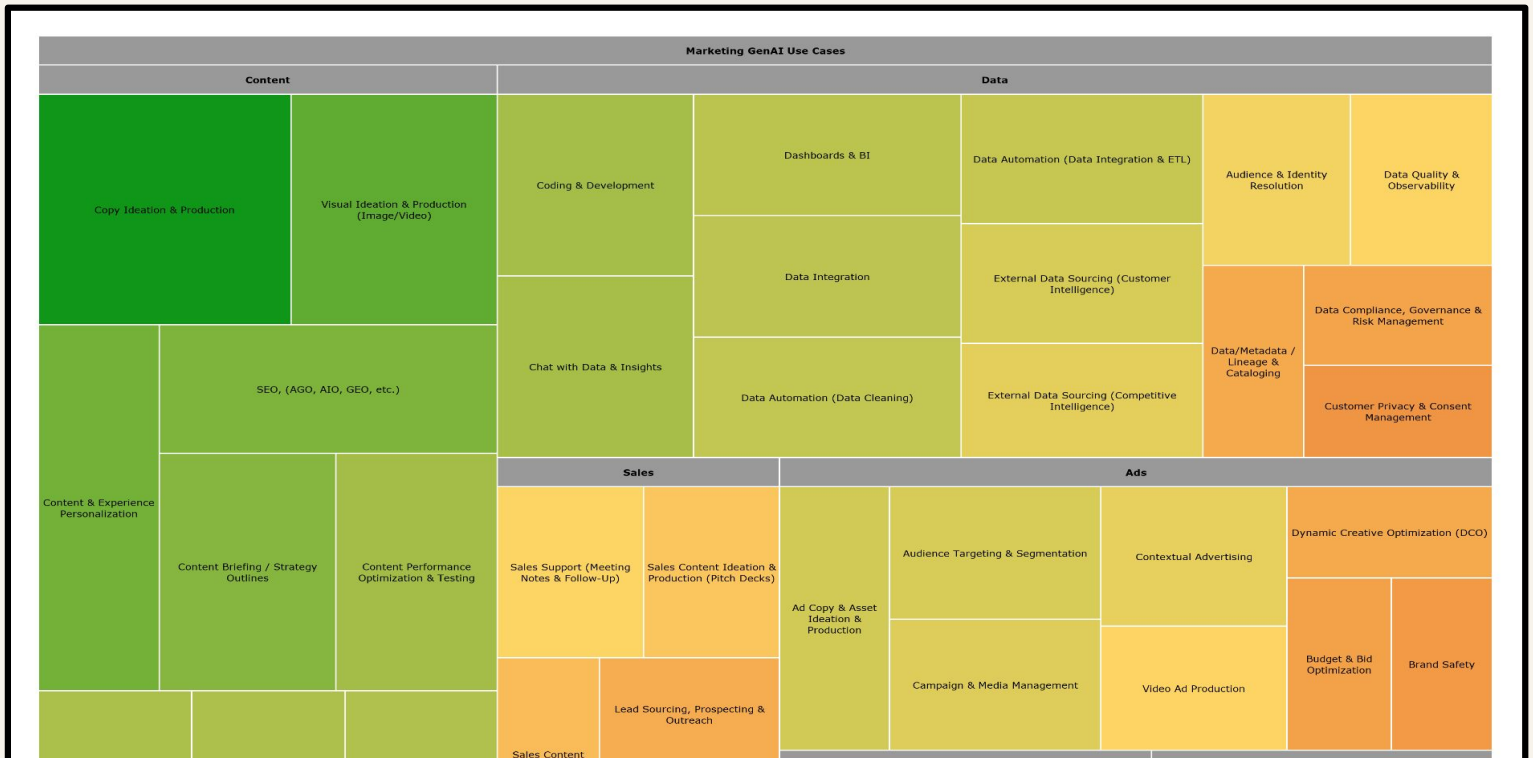
Source: MartechMap Research, chiefmartec & MartechTribe

Use Cases of AI in Marketing



70 AI Use Cases in Marketing.

Use-case breakdown based on 6,156 mentions from 208 respondents.



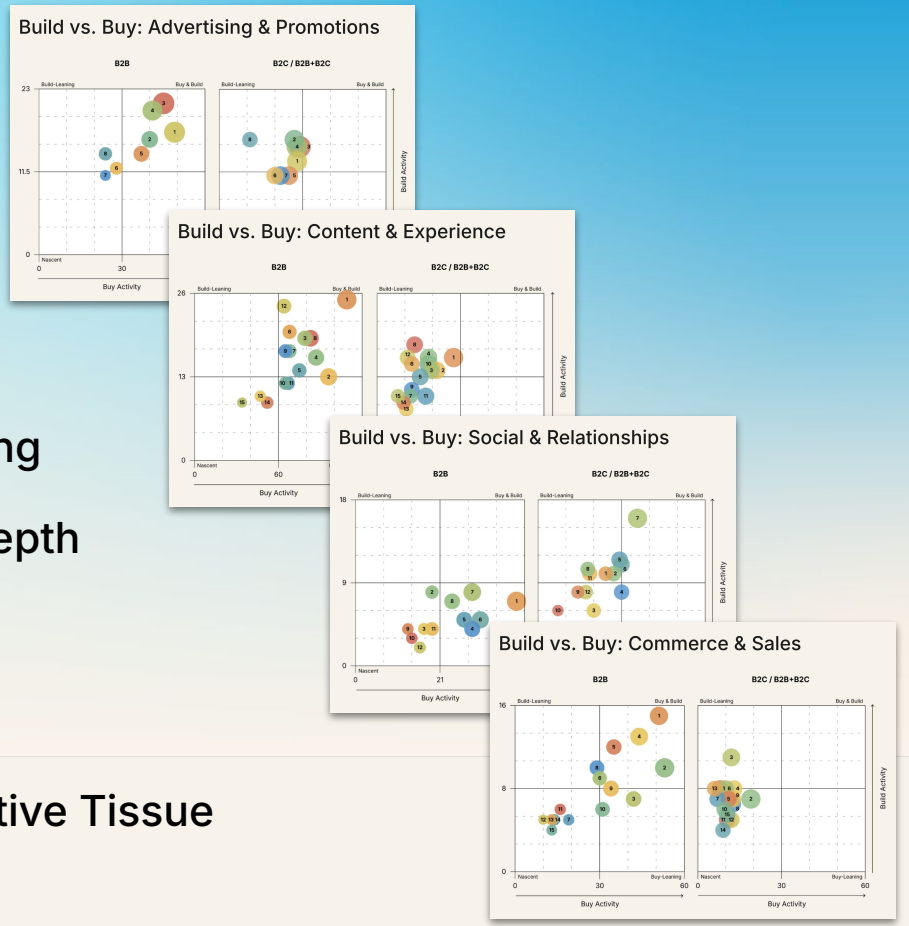
The Altitude View

Category	2024	2026	Change
Advertising & Promotions	30%	50%	+20pp
Content & Experience	79%	89%	+10pp
Social & Relationships	33%	49%	+16pp
Commerce & Sales	28%	49%	+21pp
Data	61%	75%	+14pp
Management	58%	72%	+14pp

Source: chiefmartec & MartechTribe

Common Patterns Across 70 Use Cases

- Build vs. Buy Is the Wrong Question
- The Stack is Stratifying, Not Consolidating
- B2B Leads on Breadth; B2C Builds for Depth
- The Trust Ladder
- The Governance Gap
- RAG Everywhere — The Hidden Connective Tissue



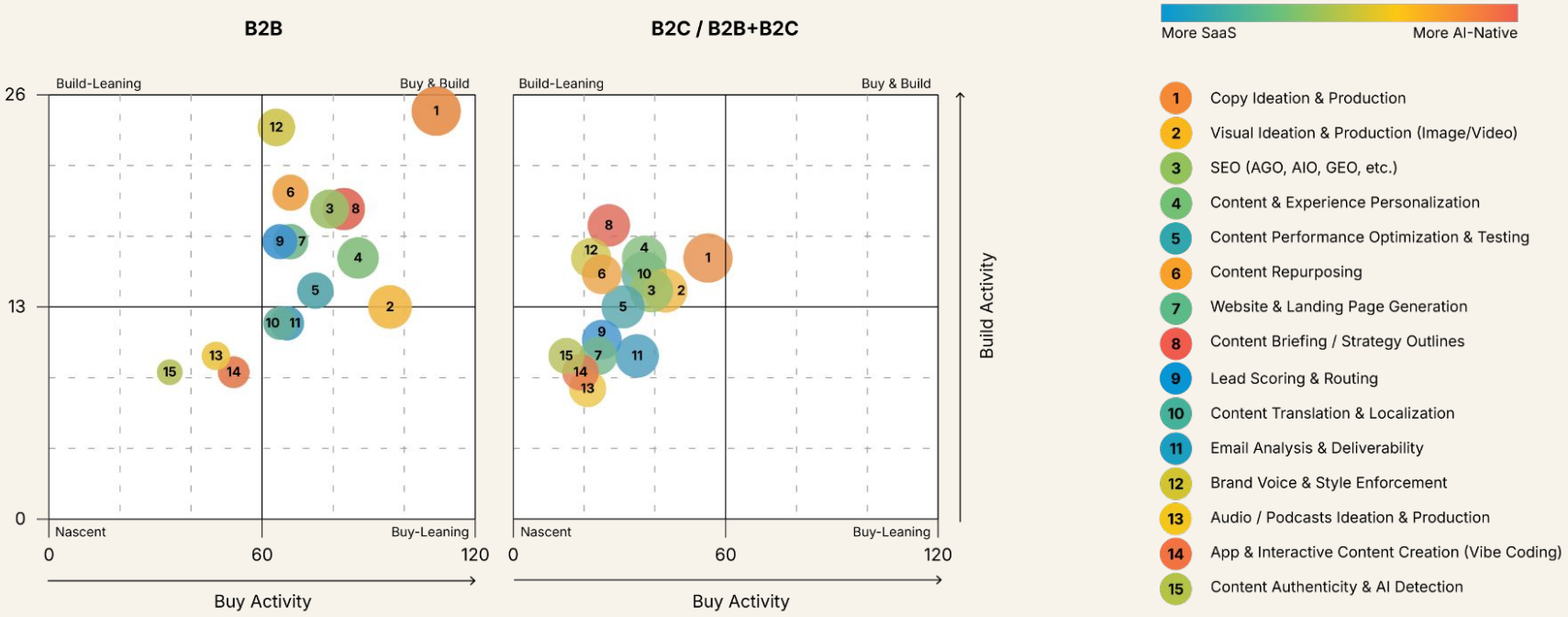
Content & Experience

Which of these functions are you using AI for?

Categories \ Answer Choice	AI in an existing SaaS	AI via a new AI-native tool	Built our own AI solution	Not using AI / not doing this	Response Total
Copy Ideation & Production	79	85	41	14	219
Visual Ideation & Production (Image/Video)	68	71	27	36	202
SEO (AGO, AIO, GEO, etc.)	64	54	33	48	199
Content & Experience Personalization	70	54	32	39	195
Content Repurposing	45	48	35	65	193
Website & Landing Page Generation	52	40	27	71	190
Content Performance Optimization & Testing	64	42	27	56	189
Content Briefing / Strategy Outlines	50	60	37	42	189
Content Translation & Localization (Copy, Visual or Audio)	58	44	27	59	188
Lead Scoring & Routing	67	23	28	68	186
Brand Voice & Style Enforcement	45	41	40	60	186
Email Analysis & Deliverability	67	35	22	61	185
Audio / Podcasts Ideation & Production	35	33	18	93	179
App & Interactive Content Creation (Vibe Coding)	34	37	18	85	174
Content Authenticity & AI Detection	26	23	19	103	171
Answered				*answered*	163
Skipped				*skipped*	23

Source: *AI Use Cases in Marketing 2026 Survey*, n=208.
Respondents could select multiple options.

Build vs. Buy: Content & Experience



Source: *AI Use Cases in Marketing 2026 Survey*, n=208.

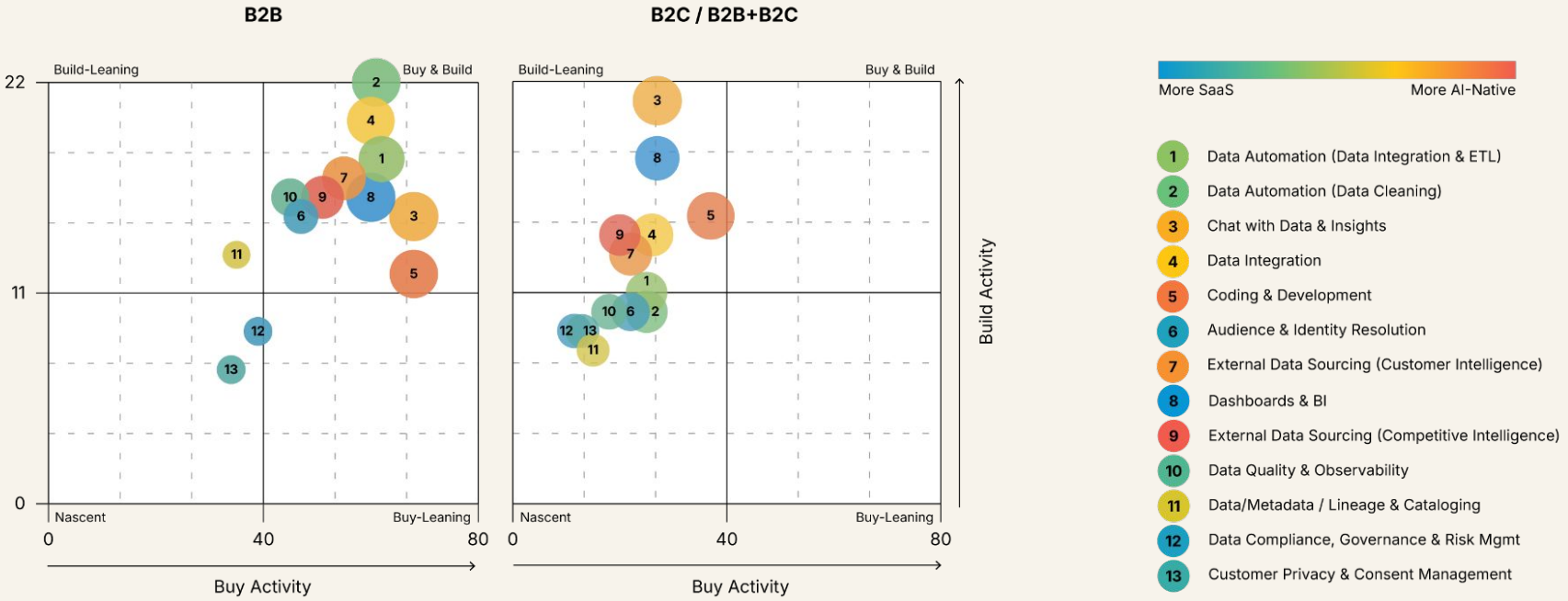
Data

Which of these functions are you using AI for?

Categories \ Answer Choice	AI in an existing SaaS	AI via a new AI-native tool	Built our own AI solution	Not using AI / not doing this	Response Total
Coding & Development	50	55	27	28	160
Chat with Data & Insights	51	44	36	25	156
Data Integration	49	37	34	35	155
Data Automation (Data Integration & ETL)	53	34	29	39	155
Data Automation (Data Cleaning)	53	33	32	35	153
Dashboards & BI	61	26	34	31	152
Audience & Identity Resolution	48	21	25	57	151
External Data Sourcing (Customer Intelligence)	41	36	30	40	147
Data Quality & Observability	39	24	26	57	146
External Data Sourcing (Competitive Intelligence)	32	39	30	43	144
Data / Metadata / Lineage & Cataloging	29	21	21	73	144
Data Compliance, Governance & Risk Management	31	20	18	70	139
Customer Privacy & Consent Management	31	16	16	71	134
Answered				*answered*	122
Skipped				*skipped*	64

Source: *AI Use Cases in Marketing 2026 Survey*, n=208.
Respondents could select multiple options.

Build vs. Buy: Data



Source: *AI Use Cases in Marketing 2026 Survey*, n=208.

NEXT UP: Interviews



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The Middle Layer as Martech's Center of Gravity



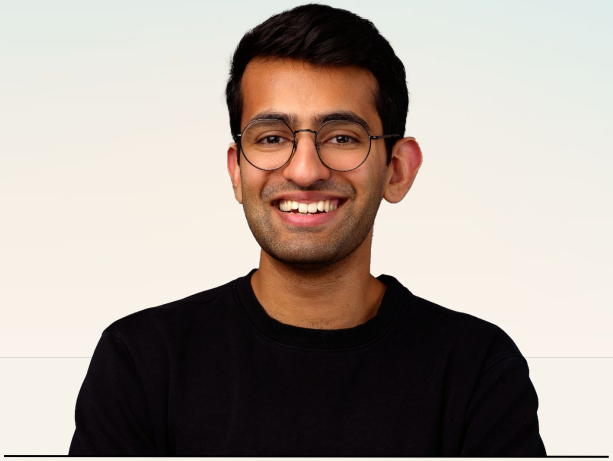


sas

*A Conversation with **Jon Moran**, Senior Marketing Manager, SAS*

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How AI Agents Will Reshape the Marketing Workflow





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*A Conversation with **Tejas Manohar**, Co-CEO, Hightouch*

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Causal AI and the Future of Marketing





GrowthLoop

*A Conversation with **Anthony Rotio**, Co-Founder & Co-CEO, GrowthLoop*

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The Future of CMS in an Agentic World





Progress®

*A Conversation with **Sara Faatz**,*
Senior Director, Community, Progress

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Open and Explainable AI in Marketing





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*A Conversation with **Ravi Dodda**, Founder & CEO, MoEngage*

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The Self-Orchestrated Customer Journey in Real Time





PEGA

*A Conversation with **Tara DeZao**,*
Sr. Director of Product Marketing, Pega

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The Campaign Creation Renaissance





knak.

*A Conversation with **Brendan Farnand**, Co-Founder and CCO, Knak*

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Thank you



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