

2025 Martech and Ad Tech Trends Show AI, Integration as Priorities

Marketing and advertising tech remain essential engines powering today's marketing teams. Overall, US companies will increase martech spend by 16.1% in 2025, representing the largest YoY growth since 2021.

But the integration of AI into these tools is adding capability and complexity to marketing, prompting teams to transform how organizations run campaigns and collaborate. The divide between martech and adtech is blurring as marketers think full-funnel and cross-platform. Here are some trends EMARKETER is tracking that show how martech and adtech is evolving.

1. B2C martech spend approaches \$30 billion despite slowing growth

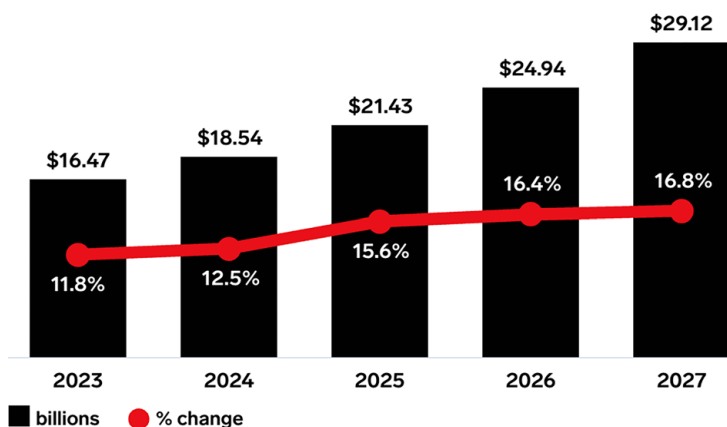
US B2C marketing technology spend will hit \$29.12 billion by 2027, according to EMARKETER's July 2025 forecast, with the rate of growth increasing each year, 2027's spend will represent a 16.8% increase.

B2B spend growth is similar, with marketers projected to spend \$13.97 billion on tools in 2027, up 17.4% from 2026, according to EMARKETER's forecast.

The steady investment comes as the ranks of tools grow. According to Scott Brinker's Chiefmartech.com, the number of martech tools grew 9% YoY and now encompass 15,384 solutions, many of which are new, AI-native platforms.

B2C Marketing Technology Spending

US, 2023-2027



Note: includes spending by companies on software or other technology that enables and facilitates marketing functions; excludes spending on hardware and spending on professional and agency services and consulting

Source: EMARKETER Forecast, July 2025

2. AI dominates the transformation agenda

About 60% of global marketing decision-makers see AI and machine learning as the top force shaping digital strategies in the next five years, according to Ascend2. This surpasses data privacy and compliance at 36%, with automation and personalization tied at 35%.

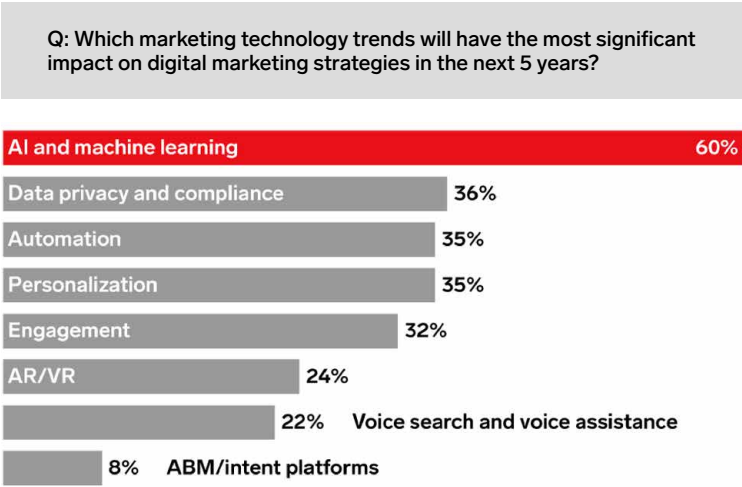
The gap between AI and other priorities shows how thoroughly artificial intelligence has captured marketing leadership's attention. That could be because the benefits of AI span the organization. When martech professionals were asked about expected AI benefits, 41% said improved coordination across business units, 40% said improved personalization capabilities, and 40% said improved understanding of customers, according to Zeta Global and Forrester. AI promises to solve persistent challenges around personalization at scale, predictive analytics, and campaign optimization.

3. Content generation leads AI deployment, but broader use cases loom

Marketing and communication content generation represents the most mature AI use case, with 23% of C-level executives already deploying these capabilities and another 30% planning implementation by 2028, according to BearingPoint's June 2025 research. Brand asset generation shows the largest planned expansion, jumping from 4% deployed in 2025 to 34% planning deployment by 2028. But ramping up AI for strategic intelligence, advertising optimization, and data capture is coming. While only 9% have deployed AI-powered analytics, 29% plan adoption by 2028. In fact, 18% of CEOs plan to deploy fully AI-driven sales, marketing, or communication strategies by 2028.

AI Is Expected to Significantly Affect Digital Strategies in the Next Five Years

% of marketing decision-makers worldwide, Oct 2024



Source: Ascend2, "The Future of the Martech Stack 2025," Nov 10, 2024

Marketing AI Use Cases Deployed by 2025 or Planned by 2028 According to C-Level Executives Worldwide, April 2025 % of respondents

	Deployed by 2025	Planned by 2028
Brand asset generation	4%	34%
Search engine optimization	10%	32%
Marketing or communication campaign personalization	12%	31%
Marketing or communication content generation	23%	30%
AI-powered marketing performance analytics	9%	29%
Marketing or communication campaign scheduling optimization	12%	29%
AI-driven customer/service user segmentation	11%	24%
Content localization	2%	21%
AI-driven sales, marketing or communication strategy	4%	18%
Product description generation	4%	15%
AI-enabled customer/service user data capture	2%	14%
AI-enhanced customer/service user data management	1%	14%
AI-powered ad bid optimization and targeting	3%	13%
AI-powered market trends and insights	2%	12%

Source: BearingPoint, "The AI Sales & Marketing Revolution: a guide towards 2028," June 25, 2025

4. Martech stacks are exploding in complexity

The number of martech tools has ballooned to over 15,000 solutions, and buyers are not afraid to add to their stacks. Some 40% of senior agency professionals worldwide will operate more than 10 tools in their technology stacks in 2025, up from 17.3% in 2024, per Basis Technologies. Meanwhile, the percentage of agencies with fewer tools is shrinking. Agencies with four to five tools dropped from 26% in 2024 to 19.3% in 2025, and those with two to three tools dropped from 17.3% in 2024 to 8.7% in 2025.

Adding tools increases capabilities but also complexity. Integration has long been a headache for teams. Marketers need sophisticated capabilities across paid media, content management, customer data, email, attribution, and creative production. Few single platforms cover all bases. That makes internal coordination critical.

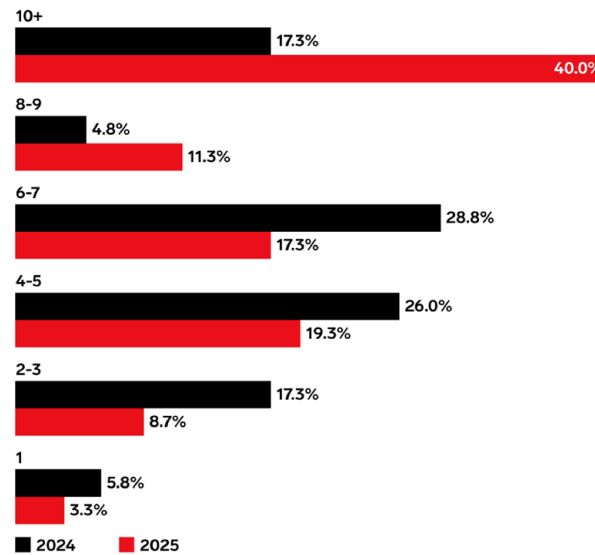
5. CMOs split between technology and organizational fixes

Some 41% of CMOs in North America and Europe used data, analytics, and measurement to boost marketing productivity in the past year, per Gartner. Technology solutions dominate the top three approaches, with AI automation at 40% and advanced technology integration at 37%. Yet, organizational changes are also key to productivity.

About a third of executives said they are streamlining operations (31%), reorganizing teams (31%), improving agency collaboration (32%), and enhancing internal communication (32%). These adoption rates suggest CMOs know productivity issues aren't solved by technology alone. Smart governance, collaboration, and process improvements remain essential. Even the smartest AI can't fix dysfunctional workflows or disconnected teams.

Number of Tools in Their Ad/Marketing Technology Stack According to Senior Agency Professionals Worldwide, 2024 & 2025

% of respondents



Note: 2024 n=104 and 2025 n=150; numbers may not add up to 100% due to rounding
Source: Basis Technologies, "2025 Advertising Agency Report," April 17, 2025

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Actions Taken by CMOs in North America and Europe to Boost Marketing Productivity, March 2025 % of respondents



Note: n=400; in the past 12 months
Source: Gartner, "2025 CMO Spend Survey," May 12, 2025

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43% of marketers struggle to connect data and personalize touchpoints

Activate customer data across channels and launch integrated programmatic and email campaigns.

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