
Report

Landscape review

First published 2025

Restructured October 2026

The 2025–2026 Marketing Technology Stack Landscape

Five layers, three stages, and a shrinking share of the budget

Martech's share of the marketing budget is at a five-year low while AI spending rises, so the stack has to earn its place. The teams that get value from it design the layers first and choose tools last.

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[Key findings →](#)

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Updated

26 October 2026

Data

Gartner CMO Spend Surveys, 2021 and 2026

Sources

4 survey figures plus AAJ's synthesis

Next review

15 December 2026

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🕒 18 min read **6** chapters **7** figures **4** references

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I wrote this report to answer one question founders keep asking: what should a marketing stack look like at my stage, and what is it worth paying for? It combines four figures from Gartner's CMO spend surveys with my own map of the stack, by layer, stage, industry and channel. The map is my synthesis, and it is marked as such.

Key findings

The first four findings are survey figures; the last two are AAJ's synthesis.

01

19.4%

of the average marketing budget went to martech in 2026, a five-year low.

[Chapter 1](#) →

02

–7.2 pts

is how far martech's share fell from Gartner's 2021 survey (26.6%) to its 2026 survey.

[Chapter 1](#) →

03

15.3%

of the average marketing budget is now allocated to AI, and 21.3% at AI-mature organizations.

[Chapter 6](#) →

04

30%

of CMOs are ready to scale AI capabilities, by Gartner's 2026 count.

[Chapter 6](#) →

05

5 layers

make up most stacks; the data and record layers decide what the other three can do.

[Chapter 2](#) →

06

3 stages

each add to a different layer: tools at Seed, data at Series B, governance at scale.

[Chapter 3](#) →

How this report was made

This is a landscape review, not a survey. The budget figures come from Gartner's CMO Spend Surveys of 2021 (400 respondents) and 2026 (401 respondents), each read from Gartner's own release or a named report of it. The layer, stage, industry and channel maps are my synthesis of how the tool categories fit together; they carry no measured figures, and every tool named is an example of its category, not a recommendation.

[Full method and limits](#) →

Executive summary

The stack is being asked to do more with a smaller share of the money. Martech has lost ground to paid media and to AI, which arrives mostly as features inside tools companies already own rather than as a new layer.

That makes architecture the decision that matters. Most stacks converge on the same five layers, and the cheap mistakes happen in the bottom two: an inconsistent customer ID or a CRM no one trusts limits every tool above it.

What to buy changes by stage and by industry, but the order of decisions does not: the questions, the layers, the data flows and the business metric come first, and the vendor comes last.

Read this if

You are choosing, consolidating or auditing marketing tools at a Seed to Series B company.

Use it to

See which layer to invest in next, and what a stack at your stage usually contains.

It will not tell you

Which vendor to buy, what tools cost, or measured returns by tool.

Contents 6 chapters



Key findings

Executive summary

1 The budget squeeze

2 The five layers

3 By company stage

4 By industry

5 By channel

6 AI and how to buy

What this means for you

Method and limits

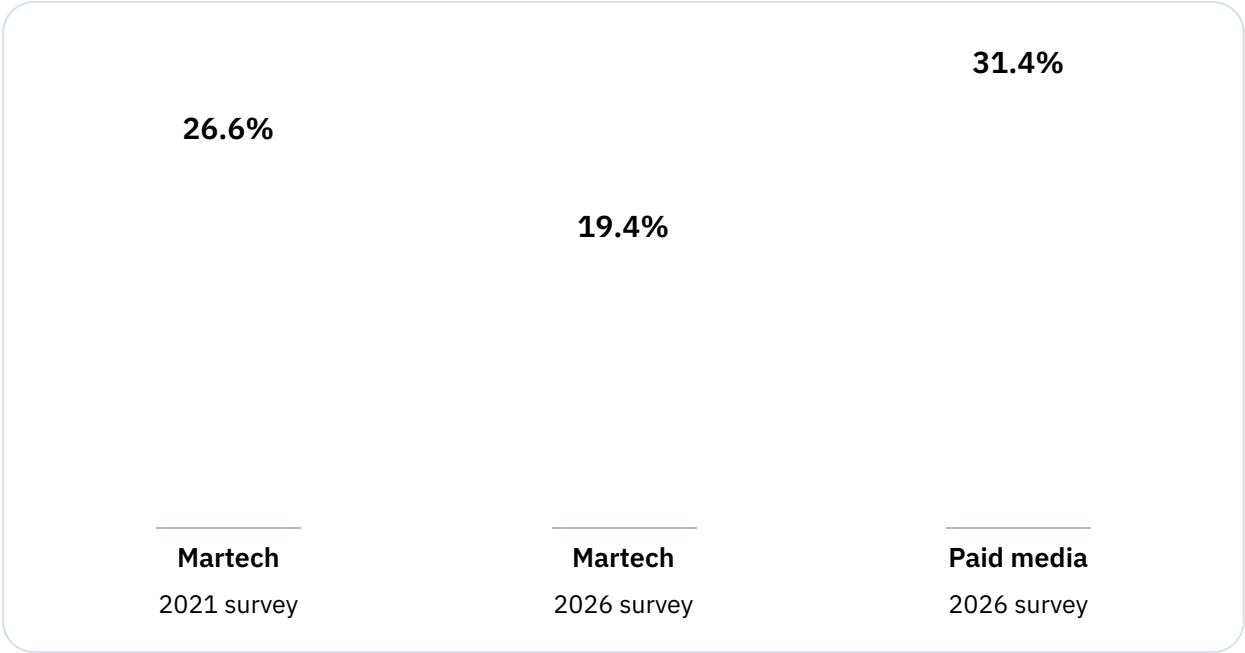
Data and citation

Chapter 1 of 6

Martech's share of the budget is at a five-year low

In Gartner's 2026 CMO Spend Survey, martech took 19.4% of the average marketing budget, the lowest in five years, against 26.6% in Gartner's 2021 survey, when it was the largest single category.^{1,2} Paid media reached 31.4% in 2026, funded in part by cuts to agencies.³

Figure 1
Martech's share of the marketing budget fell from 26.6% to 19.4% between 2021 and 2026



▼ Show the numbers as a table

Martech

Survey	Gartner 2021
Share of the marketing budget	26.6%

Martech

Survey	Gartner 2026
Share of the marketing budget	19.4%

Paid media

Survey	Gartner 2026
Share of the marketing budget	31.4%

Source: Gartner CMO Spend Survey 2021 (400 CMOs and marketing leaders, North America, UK, France and Germany, March–May 2021)²; Gartner CMO Spend Survey 2026 (401 CMOs, North America, UK and Europe, January–March 2026)³, with the martech share as reported by Chief Marketer.¹ Shares of the average marketing budget.

The grey column is martech in 2021, the blue column martech in 2026 and the gold column paid media in 2026. Martech lost 7.2 points of the budget over five years, and paid media is now more than one and a half times its size. A shrinking share does not mean a smaller stack is better. In my view, it means each tool has to show what it changes in CAC, conversion or retention, because the CFO now compares it with the ad budget it competes with.

About this data

The two surveys asked different samples: the 2021 survey covered North America, the UK, France and Germany; the 2026 survey North America, the UK and Europe, mostly companies above \$1 billion in revenue. Read the direction, not the exact gap, and note that Gartner's own 2026 pages do not publish the martech split; the 19.4% comes from Chief Marketer's coverage of the same survey.

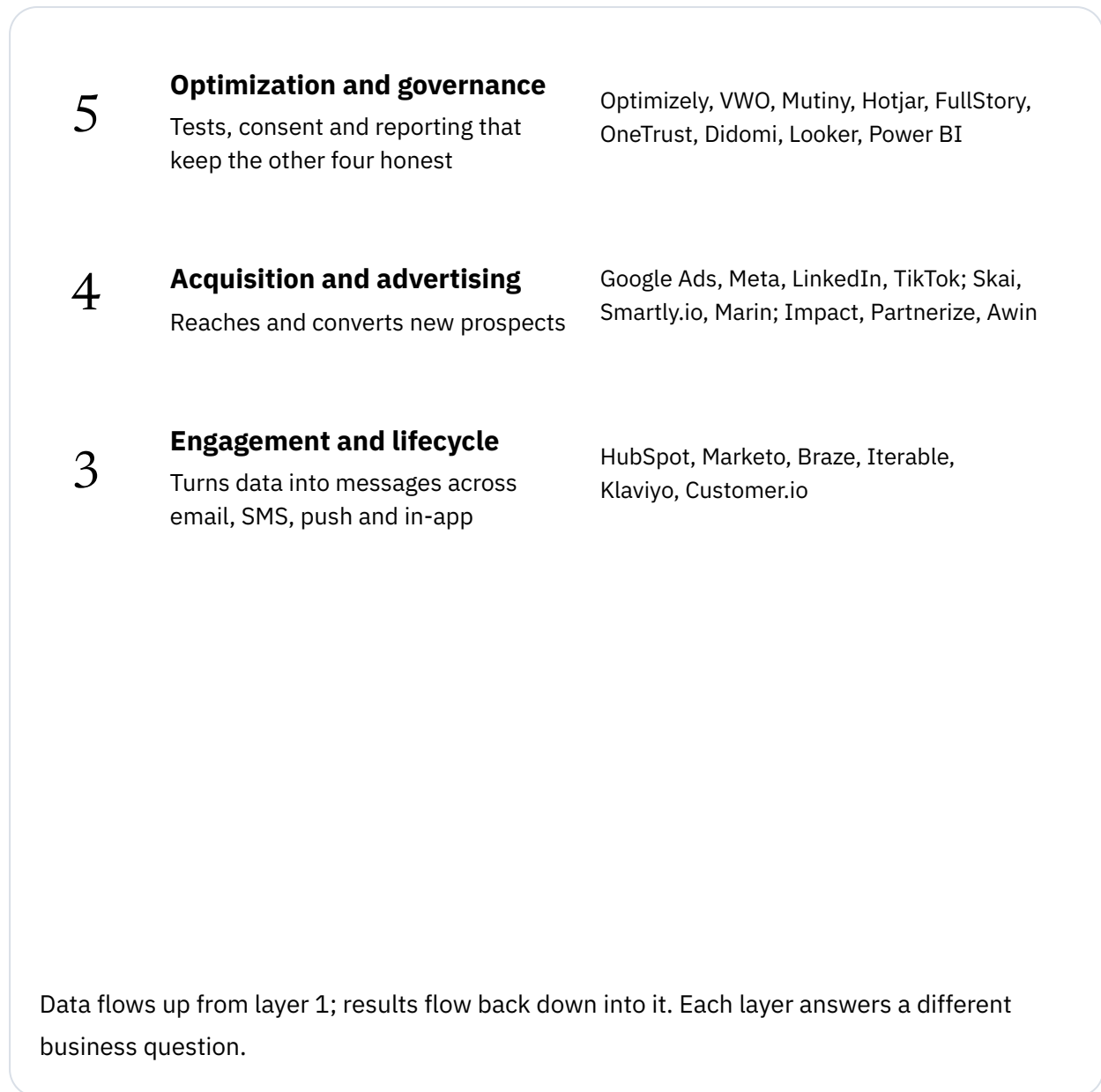
Chapter 2 of 6

Most stacks converge on five layers, and the bottom two decide the rest

Whatever the industry, the same five layers recur. They are easiest to read from the bottom up, because each layer depends on the one below it.

Figure 2

Layers 1 and 2 feed every tool above them



AAJ's model of the stack. The tools are examples of each category, not recommendations.

Read the stack from layer 1 at the bottom to layer 5 at the top. Each row names the layer, the job it does and example tools, and data flows up while results flow back down. The tools are examples, not recommendations; what matters is that every layer above 2 runs on the data the bottom two collect.

Data and identity

Event collection, identity resolution and long-term storage. When it works, segments reflect real behavior and revenue can be traced back to campaigns; when it does not, every report above it is argued over.

Systems of record

CRM, commerce and billing hold the facts about customers, orders and subscriptions. They are often bought as sales or finance tools, but they are what lets marketing tie a campaign to pipeline, bookings and retention.

Engagement, acquisition and optimization

The top three layers act on the data: lifecycle tools message existing customers, the acquisition layer reaches new ones, and the optimization layer tests, governs and reports on both. Salesforce's Pardot, a common engagement tool, has been called Marketing Cloud Account Engagement since 2022.

In my view, the cheapest stack improvement at almost any stage is in layer 1 or 2: one customer ID, one event schema, one CRM everyone trusts. Tools in the top three layers cannot fix data they never receive.

Chapter 3 of 6

Each stage adds to a different layer

Early-stage teams need speed and learning more than data depth. Growth-stage teams add the data and lifecycle layers. Late-stage companies standardize, and their main work becomes governance.

Figure 3

What a typical stack holds at each stage, layer by layer

Layer	Pre-seed to Series A (under 50 people)	Series B to D (50 to 500)	Late stage (over 500)
Data and identity	GA4 and the ad platforms' own reporting	Add a CDP or event pipeline and product analytics	Central warehouse as single analytical record
Systems of record	One CRM, often bundled with email	Upgrade the CRM; connect billing and product data	Enterprise suite plus best-of-breed tools, with shared ownership
Engagement	The CRM's email tool	A dedicated lifecycle platform with behavior-triggered journeys	Journey orchestration across business units
Acquisition	Native ad platform interfaces	Cross-channel management and server-side conversion signals	Programmatic, partner networks and in-house measurement
Optimization	Simple tests on positioning and channels	Structured A/B testing, BI on the warehouse	Formal governance, consent management, regular stack audits

AAJ's synthesis of typical stacks by stage. Headcount bands are approximate; many companies sit between columns.

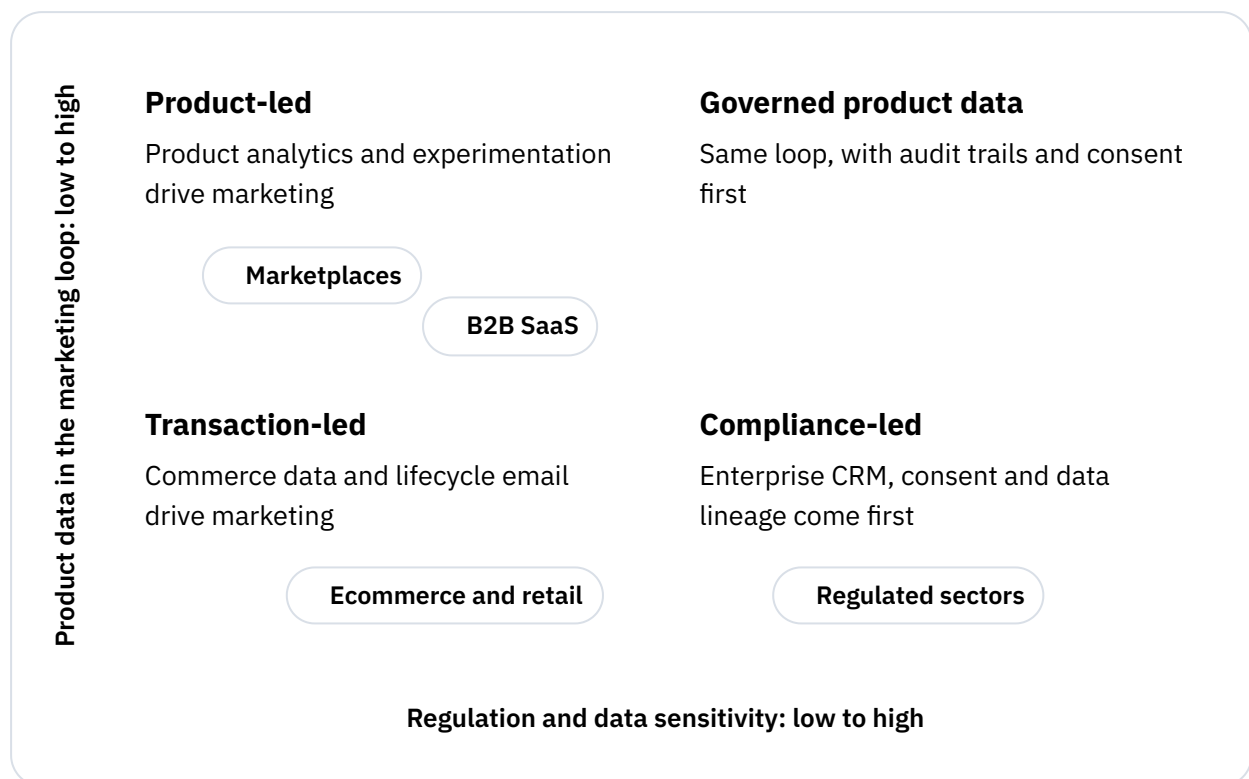
Read each row across to see how one layer grows from the first team to a late-stage company; read each column down to see a whole stack at one stage. The growth-stage step, adding an event pipeline, product analytics and a real lifecycle tool, is, in my view, where the most money is either well spent or wasted. It pays back only with someone who owns the data and the journeys; without that owner the tools go unused.

Industry decides which layer comes first

Two things shape an industry's stack more than its size: how much product data feeds marketing, and how regulated the data is.

Figure 4

Where an industry sits on two axes predicts which layer it invests in first



AAJ's model, not a measurement. Positions are illustrative.

The horizontal axis runs from light to heavy regulation, the vertical from little to a lot of product data in the marketing loop, and each quadrant names the layer that comes first there. B2B SaaS and marketplaces sit high on product data; ecommerce sits low on both; regulated sectors sit far right. The positions are my model, not a measurement. In my view, a founder should find their quadrant and invest in its first layer before buying anything in the other three.

What the stack is built around

B2B SaaS

CRM tied to marketing automation and product analytics; product usage flags product-qualified leads and expansion; campaigns report in pipeline and ARR

Ecommerce and retail

Commerce and payment data feed lifecycle messages on browsing, cart and purchase behavior; attribution and testing decide profitability

Marketplaces

Product analytics and experimentation; lifecycle messages split by buyer and seller; fraud checks tied to identity and payments

Regulated sectors

Enterprise CRM with audit and security features, consent management and clear data lineage; a slower pace of change

Chapter 5 of 6

Every channel leans on the data layer to prove it worked

Each channel uses different tools, but all of them need the data layer to show what they caused. Paid channels now rely on first-party conversion signals sent server-side; owned channels on behavior-triggered journeys; organic channels on patience and content analytics.

Figure 5

Paid, owned and organic channels each lean on different layers, and are judged differently



AAJ's synthesis.

Each row is a channel group. A filled dot marks a layer of the stack it depends on, and the last column names the measure it should be judged by. Read down the first column: data and identity is filled in three of the four rows, and measurement and governance lean on all five layers. In my view, a channel that cannot be measured from first-party data should get a small, time-boxed budget until it can.

Chapter 6 of 6

AI is arriving inside existing tools, so the order of decisions matters more

Gartner's 2026 survey found CMOs allocating 15.3% of the marketing budget to AI, and 21.3% at AI-mature organizations, while only 30% said they were ready to scale AI capabilities.⁴ Most of that AI arrives as features inside platforms companies already pay for: generated ad copy, predictive scoring, anomaly alerts.

Figure 6

AI already takes 15.3% of the average marketing budget, but only 30% of CMOs are ready to scale it

Average marketing budget allocated to AI

15.3%

All 401 CMOs in the 2026 survey

At AI-mature organizations

21.3%

The same measure, for the most AI-mature respondents

Ready to scale AI capabilities

30%

Share Gartner reports as ready to scale

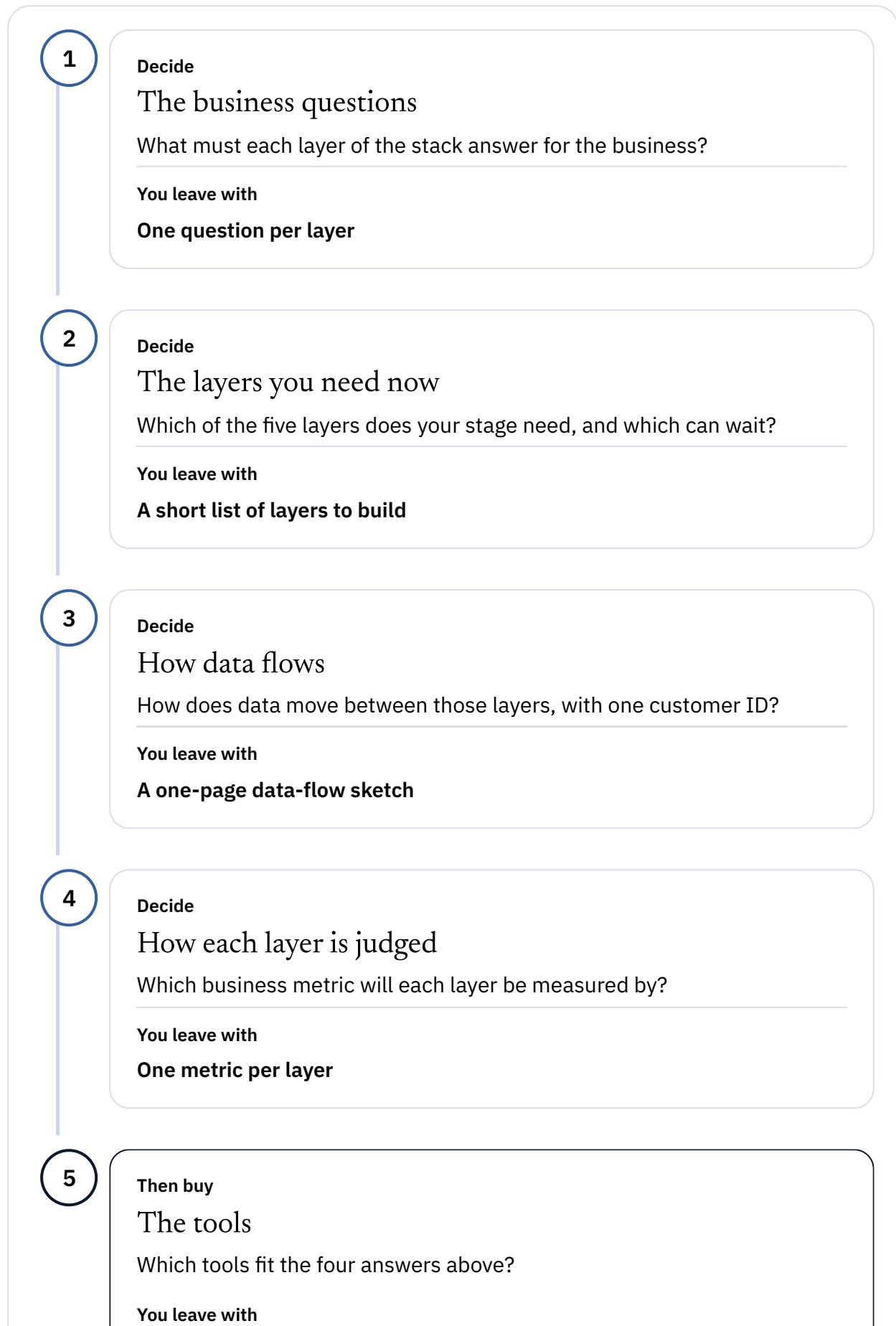
Source: Gartner 2026 CMO Spend Survey press release, 11 May 2026; 401 CMOs across North America, the UK and Europe, most at companies above \$1 billion in revenue, January–March 2026.⁴ The first two are shares of budget; the third is a share of respondents.

The first two cards are shares of the budget; the third, in navy, is a share of CMOs. Put together, they say money is moving into AI faster than teams can use it: 15.3% of the budget on average, 21.3% at the most mature, yet only 30% ready to scale. AI makes the fundamentals more important, not less. A scoring model trained on a messy CRM scores the mess. Start with one narrow use case on data you trust, keep a person approving the output, and judge it by the business metric it was meant to move.

The same discipline applies to every purchase. Decide what each layer must answer before you look at vendors.

Figure 7

Choose tools last: four decisions come before any vendor



AAJ's buying sequence.

Read it top to bottom. Steps 1 to 4 are decisions you make on paper, each ending in something you can write down; only step 5 involves vendors, and the four answers become your shortlist criteria. In my view, most stack regret comes from starting at step 5. The five practices below are how I apply the sequence.

1. **Design the architecture first.** Name the layers you need and the question each one answers, then evaluate tools.
2. **Fix data quality and integration early.** A shared event schema, one ID strategy and monitored pipelines into the CRM or warehouse.
3. **Right-size to stage and industry.** A few integrated platforms early; data and lifecycle tools at growth; standardization at scale.
4. **Give every platform an owner.** Someone responsible for its data, its training and its yearly audit.
5. **Judge tools by business metrics.** CAC, conversion, churn and expansion revenue, with a set time to show results.

What this means for you

The order of decisions is the same at every stage; what changes is the layer you spend on next.

Pre-seed

Keep to a website, analytics, one CRM with email, and the ad platforms. Write down your event names and customer ID now; it costs nothing and saves a migration later.

Seed

Before adding tools, connect the CRM to billing and product data. Add a dedicated lifecycle tool only when someone owns the journeys.

Series A–B

Audit the stack once a year against business metrics, retire what nobody uses, and pilot AI on one narrow use case with a named owner.

To turn this into a plan, the Analytics and Attribution Playbook builds the measurement layer in 90 days, and the Agentic AI Playbook covers a first AI pilot.

Method and limits

Type

Landscape review: secondary survey figures plus AAJ's synthesis

Survey figures

Gartner CMO Spend Survey 2021 (400 respondents) and 2026 (401 respondents)

Synthesis

Layer, stage, industry and channel maps by AAJ; no measured figures

Tool names

Examples of each category, not recommendations or rankings

Last verified

Survey figures checked 14 October 2026

Next review

15 December 2026

Each survey figure is taken from Gartner's own release or a named report of it, with the sample and dates given where it is used. Where Gartner does not publish a figure itself, the report says whose coverage it comes from.

What this report cannot tell you

- Gartner's samples are mostly large companies, so the budget shares describe enterprises better than startups.
 - The 2021 and 2026 surveys covered different regions; the change between them is a direction, not a precise trend.
 - The stage, industry and channel maps are judgement, not measurement. They describe common patterns; your stack may differ for good reasons.
 - The report does not price tools or measure returns by tool.
-

Data and citation

The four survey figures, with their samples and links, are listed in the references.



[Full report](#)

[PDF](#)



[Figure data](#)

[CSV, every number behind the figures](#)



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☞ How to cite this report

Jha, S. (2026). *The 2025–2026 Marketing Technology Stack Landscape*. AAJ.
<https://aajconsult.com/reports/marketing-technology-stack-landscape-2025-2026>

 **Copy citation**

Free to quote with credit to AAJ. The survey figures belong to Gartner; cite Gartner for them.

^ BibTeX

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@techreport{jha2026martech,  
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  year = {2026},  
  url = {https://aajconsult.com/reports/marketing-technology-stack-  
landscape-2025-2026}  
}
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Independence. No sponsor and no vendor relationships. AAJ is paid by none of the companies named here; they are examples of their category. AAJ sells marketing strategy services, including stack audits.

Version history

2025

First published.

September 2026

Updated with Gartner's 2026 CMO Spend Survey figures.

26 October 2026

Restructured as a report. Removed claims attributed to unnamed "2024 research" (that first-party data leaders "significantly outperform peers", that lifecycle tools deliver "the highest ROI", that enterprises "underuse significant portions" of their platforms) and the general reading list, because none named a traceable figure; where the point stands, it is now marked as my read. Replaced "the deprecation of third-party cookies" with browser and privacy limits, because Chrome has not removed third-party cookies. Renamed Pardot. Added the 30% ready-to-scale figure from Gartner's release.

Questions founders ask

What is a marketing technology stack?



The set of tools a company uses to collect customer data, keep its records, reach and message customers, and measure and govern the results. Most stacks fall into five layers: data and identity, systems of record, engagement, acquisition, and optimization and governance.

How much of the marketing budget goes to martech?



In Gartner's 2026 CMO Spend Survey, martech took 19.4% of the average marketing budget, a five-year low, down from 26.6% in Gartner's 2021 survey. Gartner's respondents are mostly large companies, so a startup's share can differ widely.

What martech does an early-stage startup need?



A website, analytics, one CRM with email, and the ad platforms' own tools. The most valuable early step costs nothing: agree on event names and a customer ID before data starts piling up.

When should a startup add a CDP?



Usually at the growth stage, when several tools need the same customer data and someone can own the event schema. Before that, a CRM connected to billing and product data covers most needs.

How should I evaluate AI features in marketing tools?



Start with one narrow use case on data you already trust, keep a person approving the output, and judge it by the business metric it was meant to move, such as conversion or time saved per campaign.

Related on AAJ

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Agentic AI Playbook

Pilot AI in your stack

Tools

Marketing Budget Calculator

Size your own budget

Tracking Plan and UTM Builder

Agree event names before data piles up

References

The superscript numbers in the report match this list.

1. Chief Marketer (24 June 2026). Gartner CMO Spend Survey: Budgets Reflect Increase in Consumption-Based Martech, Paid Media Spend. Reports Gartner's 2026 survey of 401 CMOs, January–March 2026. chiefmarketer.com
2. Gartner (14 July 2021). Gartner Says Marketing Budgets Have Plummeted to 6.4% of Overall Company Revenue in 2021. 400 CMOs and marketing leaders, North America, the UK, France and Germany, March–May 2021. businesswire.com
3. Gartner (2026). CMO Spend Survey 2026. 401 CMOs, North America, the UK and Europe, January–March 2026. gartner.com
4. Gartner (11 May 2026). Gartner 2026 CMO Spend Survey Finds CMOs Allocate 15.3% of Marketing Budgets to AI, but Only 30% Are Ready to Scale AI Capabilities. gartner.com



Written by Saroj Jha

Founder of AAJ

Saroj has spent more than ten years in marketing strategy. He writes AAJ's reports in his own voice. Every figure is referenced, and where a report gives his view it says so.

[About the founder](#) →



Next step

Find out which layer of your stack to fix first

A Growth Audit maps your funnel, channels and measurement, including the stack behind them, and names the fixes to make first.

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