

Market Analysis

CEO DESK – AI research Report

Strictly Private and Confidential

The Market

AI will likely replace all marketing departments of Fortunes 1,000

Market Overview

operates in the rapidly growing and evolving MarTech industry that encompasses a wide range of technologies and tools for managing and optimizing marketing efforts.

A) Overview of the MarTech Industry

Over the past few years, Marketing Technology (MarTech) witnessed continuous growth primarily driven by the expansion of the digital economy. This was accelerated due to the pandemic, resulting in a huge shift in consumer behaviour. The way they shop, work, invest, learn, entertain, purchase, maintain wellness, and share their experiences, forcing companies to change their business models and adapt to this new market reality. Thus, Digital Customer Experience (DCx) has become more important than ever with digital becoming the key channel for customer acquisition, engagement, retention, advocacy, and growth.

Marketing, a historically creative discipline, is becoming more and more technical with a flurry of MarTech platforms and service providers that are transforming this market.

- Over the past 100 years, marketing has been a creative discipline. But today, marketing is increasingly becoming a technical discipline with a flurry of marketing technology platforms and service providers transforming this market. Globally, companies are estimated to spend about US \$1.5 to \$1.8 trillion on marketing in 2023.
- If we break this down, advertising is about \$650 billion, marketing services is about \$130 billion, technology is about \$175-180 billion, and others (such as data, partnerships, events, retail activation, sponsorships, etc.) is somewhere between \$500-800 billion.
- The share of technology in marketing spends is seeing a significant increase.

Marketing Technology (MarTech) today, is approximately a \$175 billion market worldwide, with North America and the UK accounting for over 50% of the market. Further, the market has witnessed continued growth over the past few years with MarTech spends growing 2X in major markets of North America and the UK over the last three years.

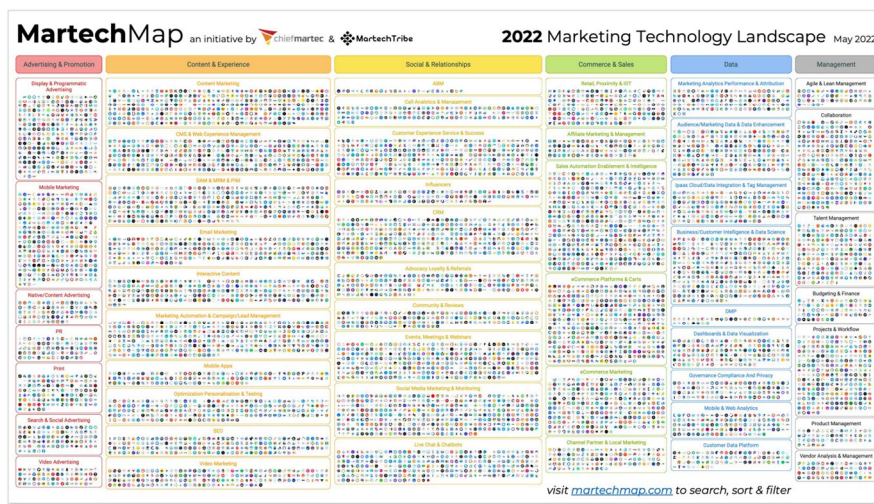
- This growth is driven by the increased rise of digital adoption during the pandemic. Now 52% of enterprises are planning to increase their MarTech spends in 2023.
- Indeed, with the increasing adoption of technology in marketing, all product offerings are being transformed into intelligent and hyper-personalized conversations. Be it product-driven or service-driven companies, or service-driven companies, they are being differentiated by their experiences. Companies with superior customer experiences bring in 5.7X times more revenue than competitors that lag in customer experience.
- With the rapidly growing reach of the internet (4.7 billion people), the increasing penetration of mobile internet users (4.4 billion people), the rapid rise in e-commerce and the revenue from the e-commerce market which is projected to reach US \$3 trillion in 2023 with an annual growth rate at 6.3% and 'digital living' becoming the core of every individual's life across the globe - all these trends are driving the adoption of MarTech and redefining how companies create their digital experience.
- The ability of marketing and IT functions across companies to intuitively understand and manage pre-sales and post-sales experiences is becoming very critical. Marketing is no longer just about creative communication, developing brand messages, and collaterals; it is about the ownership of experiences through the lifecycle of the customer, given that this is the only function that owns the brand messaging, the interaction touchpoints, and the channels of engagement. Each of these impact customer experience across acquisition, growth, and retention.

Today, marketing and technology departments significantly impact customer acquisition, growth, and retention. Therefore, they have shifted from being just a support function to now having a role in senior leadership and boards of companies.

B) State of the Market – an Overview

Decision-makers across brands are hedging their bets on effective strategies to retain loyal customers. There is a laser focus that falls back on leveraging customer data effectively. Personalisation emerges as the highway to customer retention, and marketers strive to use real-time data to inform actions. MarTech is a vibrant, rapidly changing industry.

The 2022 Martech Map — A Living Landscape



This is a snapshot of the new marketing technology landscape as of May 3, 2022. It has **9,932** martech solutions mapped into 49 categories.

We call it a snapshot, because this graphic is now dynamically produced from a live data set that you can explore at martechmap.com.

The look-and-feel of the landscape is quite different as a result. Instead of packing full logos in by hand — an insanely laborious effort in previous years — we are now using the favicon from each vendor's website and fitting them in an evenly-spaced grid.

This has several advantages over previous layouts. Because it's now algorithmically generated, we can publish a new version any time with refreshed data. Given that the martech industry is likely to continue to evolve rapidly, we will update it regularly. In fact, we encourage you to contribute by reporting new, changed, or exited vendors on martechmap.com.

The advantage of using favicons for the logos is that we can scrape them directly from vendors' websites — to be sure we always have the latest version — and easily fit them into a grid.

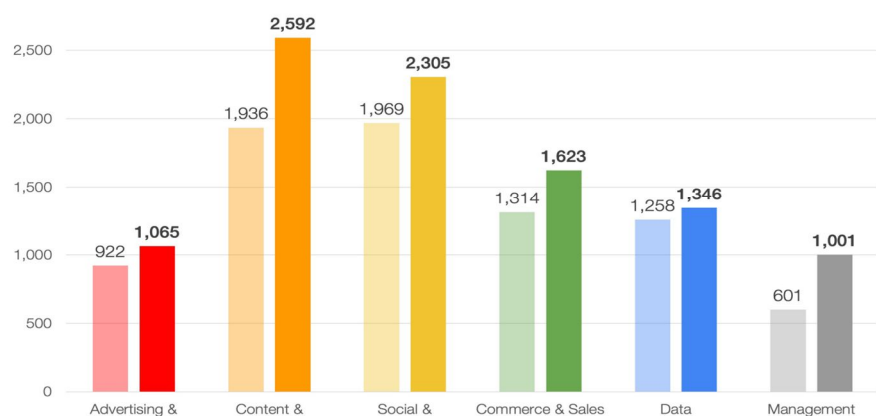
Every Martech Category Grew, But Some Grew Faster

While every category on the martech landscape experienced growth over the past two years, some grew faster than others:

- Advertising & Promotion: 16%
- Content & Experience: 34%
- Social & Relationships: 17%
- Commerce & Sales: 24%
- Data: 7%
- Management: 67%

The largest growth happened in the categories of Content & Experience, Commerce & Sales, and Management. The first two make sense as these are the categories where there is the greatest potential for differentiation in customer experience.

The growth in management tools is likely a result of marketing teams operating their day-to-day work in an ever more digital fashion — including greater support for remote work.



growth in martech categories from 2020 (light) to 2022 (dark)

C) The Global Marketing Automation Software Market

With its capability of driving productivity and economic development, Artificial Intelligence (AI) is already having a huge impact on our everyday lives in recent years.

- AI technology is the catalyst of business model innovation that disrupts industries and companies. AI transforms how businesses create and capture value, triggering business and technology innovation in the era of user-oriented digital economy.
- There are numerous valuable use cases that AI can address across organisations. In the form of vertical industrial and enterprise solutions, AI can offer substantial value such as enhancing customer services, driving productivity, reducing cost and lowering prices, improving product and service offerings.

With its power to analyse vast amounts of data and make intelligent decisions, AI has emerged as a pivotal game-changer in a myriad of fields, SaaS included.

- As a booming industry, Software as a Service (SaaS) gives businesses the keys to a treasure trove of software applications through convenient subscription models.
- The integration of generative AI into SaaS solutions is on the rise. According to a report by Omdia, global AI software revenue is expected to reach \$125 billion by 2025, up from \$ 15 billion in 2020. The report also predicts that AI will be integrated into nearly every new software product and service by 2025.
- SaaS companies are taking notice of the potential benefits of AI and are starting to integrate it into their products. In fact, 35% of SaaS businesses are already using AI, and another 42% plan to use it in the near future.
- **AI and SaaS are each powerful forces in tech. But when fused together, their impact can be even greater than expected.**

The demand for AI has drastically grown over the years and would grow even further within this decade. In fact, AI's global market size is set to **increase from \$87 billion last year to a notable \$1.6 trillion by 2030**, at an annual growth rate of 38.1%.

- **AI software solutions** make up a hefty slice of this pie, and this includes the global SaaS market.
- AI is closely tied to SaaS in that it has become a critical functionality of most SaaS platforms, regardless of their proprietary functions, widening their capabilities to provide more solutions to users. For instance, sales and marketing platforms adopt AI to enable users to map out customer journeys and workflows and automate the actions surrounding each stage. Meanwhile, business management systems incorporate AI so that users can receive business intelligence or data analytics in areas like sales, profit margins, staff performance, and competitor performance, among many others.
- As far as enhancing company performance is concerned, AI-powered SaaS platforms have it in spades. A 2021 PwC report reveals that 52% of business executives credit AI tools, including SaaS solutions, for boosting company productivity. Similarly, 50% of executives cite AI-based systems for enabling their organizations to reach their cost-saving goals. Moreover, the use of AI-powered platforms has helped innovate the products and services of 50% of organizations.

Marketing has come a very long way since the days of print ads and radio jingles. Today, businesses are using cutting-edge technology to reach their target audience more effectively than ever before. One of the most powerful tools at their disposal is Artificial Intelligence (AI). By harnessing the power of machine learning, natural language processing, and predictive analytics, AI tools are transforming the way companies approach marketing.

- According to a 2021 study conducted by Gartner, it was predicted that by 2022, **70%** of enterprises would be experimenting with AI in some capacity, up from 4% in 2018. This suggests that the adoption of AI tools is on the rise and becoming more common place among businesses.
- According to HubSpot's State of Media and Content Planning Report 2022, 34% of content marketers are using AI content creation tools to generate ideas and conduct relevant keyword research. Generative AI tools can automate many aspects of the marketing process, from content creation to lead generation. This can save businesses a significant amount of time and resources.

- Generative AI tools can analyze data on individual customers to create personalized marketing messages and experiences. This can help businesses better connect with their target audience and improve conversion rates.
- Generative AI tools can produce a large volume of content in a short amount of time, making it easier for businesses to scale their marketing efforts.
- Generative AI tools can help businesses generate new and innovative marketing ideas that they may not have thought of on their own. This can help them stand out in a crowded market and attract new customers.
- Generative AI tools can reduce the cost of marketing by automating tasks that would otherwise require manual labor. This can help businesses achieve a higher return on investment and maximize their marketing budget.

Overall, generative AI marketing tools have the potential to revolutionize the way businesses approach marketing by making it more efficient, personalized, and cost-effective.

The global market for AI-powered SaaS platforms for marketing agencies is expected to grow significantly in the coming years. This growth is being driven by several factors, including:

- **The increasing adoption of AI by marketing agencies:** AI is becoming increasingly popular among marketing agencies to improve their efficiency and effectiveness. AI-powered platforms can help agencies automate tasks, identify new opportunities, and improve their targeting.
- **The growing demand for personalized marketing:** Consumers are increasingly demanding personalized marketing experiences. AI-powered platforms can help agencies deliver personalized marketing messages that are more likely to resonate with their target audiences.
- **The increasing availability of data:** The amount of data available to marketing agencies is growing exponentially. AI-powered platforms can help agencies make sense of this data and use it to improve their marketing campaigns.

The global market for AI-powered SaaS platforms for marketing agencies is expected to reach \$10 billion by 2025. The market is being led by North America, followed by Europe and Asia-Pacific.

Some of the key trends in the market include:

- **The increasing focus on personalization:** As mentioned above, consumers are increasingly demanding personalized marketing experiences. AI-powered platforms can help agencies deliver personalized marketing messages that are more likely to resonate with their target audiences.
- **The growing importance of data-driven marketing:** AI-powered platforms can help agencies make sense of the vast amounts of data available to them and use it to improve their marketing campaigns.
- **The increasing adoption of cloud-based platforms:** Cloud-based platforms are becoming increasingly popular among marketing agencies as they offer a few advantages, such as scalability, flexibility, and cost-effectiveness.
- Overall, the global market for AI-powered SaaS platforms for marketing agencies is expected to grow significantly in the coming years. This growth is being driven by several factors, including the increasing adoption of AI by marketing agencies, the growing demand for personalized marketing, and the increasing availability of data.

Conclusion:



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