



2026 MarTech Subway Map

December 2025

A Different Kind of Analyst Firm...

GEEKS	MYSTICS
LOSERS	POSERS

“the mystical quadrant”

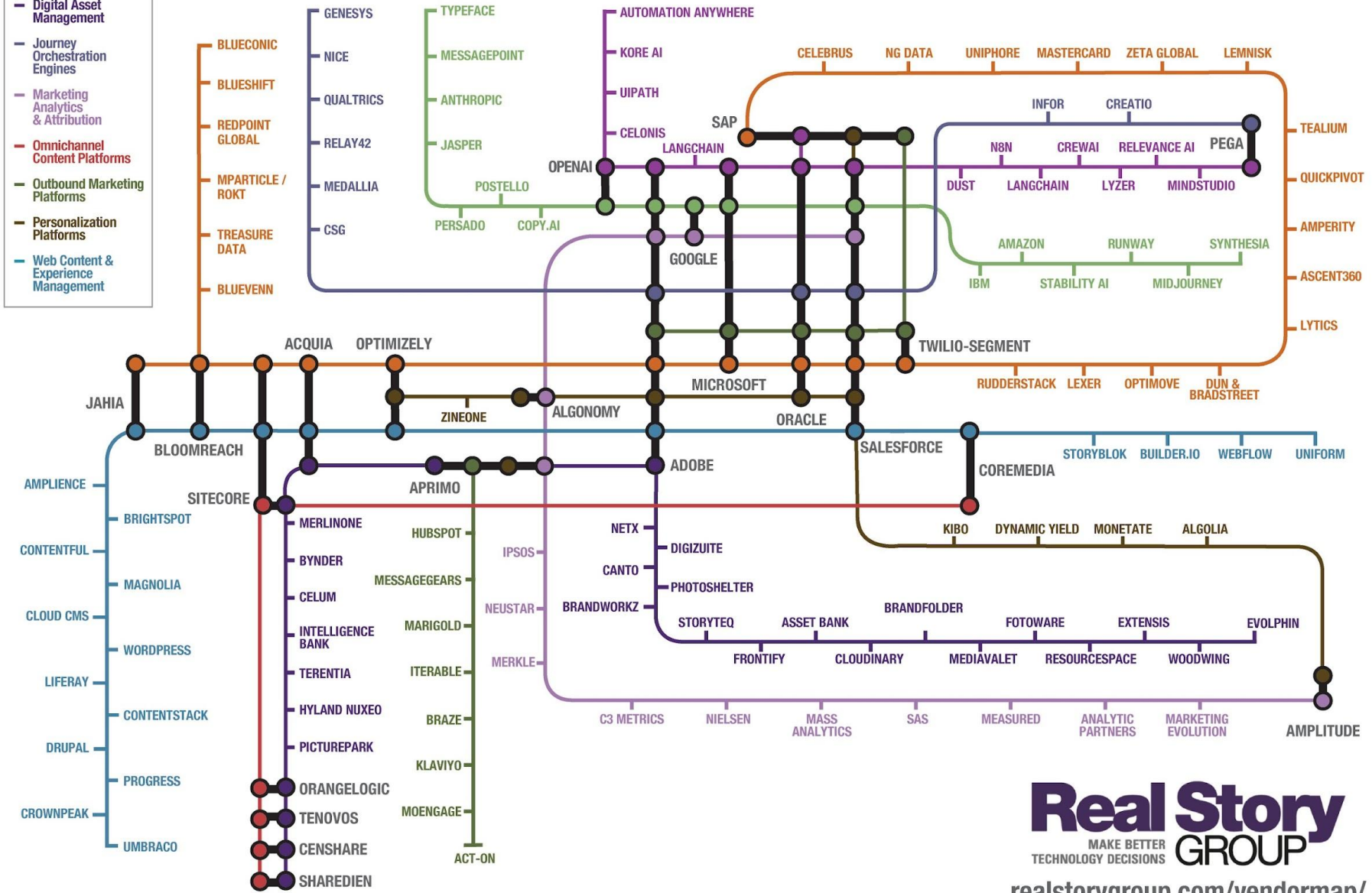
INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

MARTECH STACK VENDOR MAP

Real Story Group's vendor evaluations and advisory services have helped thousands of organizations find their way. We can help you too.

Check out Corporate Memberships today: www.realstorygroup.com/Memberships

- KEY**
- Agentic for Marketing
 - AI for Marketing
 - Customer Data Platforms
 - Digital Asset Management
 - Journey Orchestration Engines
 - Marketing Analytics & Attribution
 - Omnichannel Content Platforms
 - Outbound Marketing Platforms
 - Personalization Platforms
 - Web Content & Experience Management



Real Story
 MAKE BETTER
 TECHNOLOGY DECISIONS **GROUP**

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Webinar Agenda



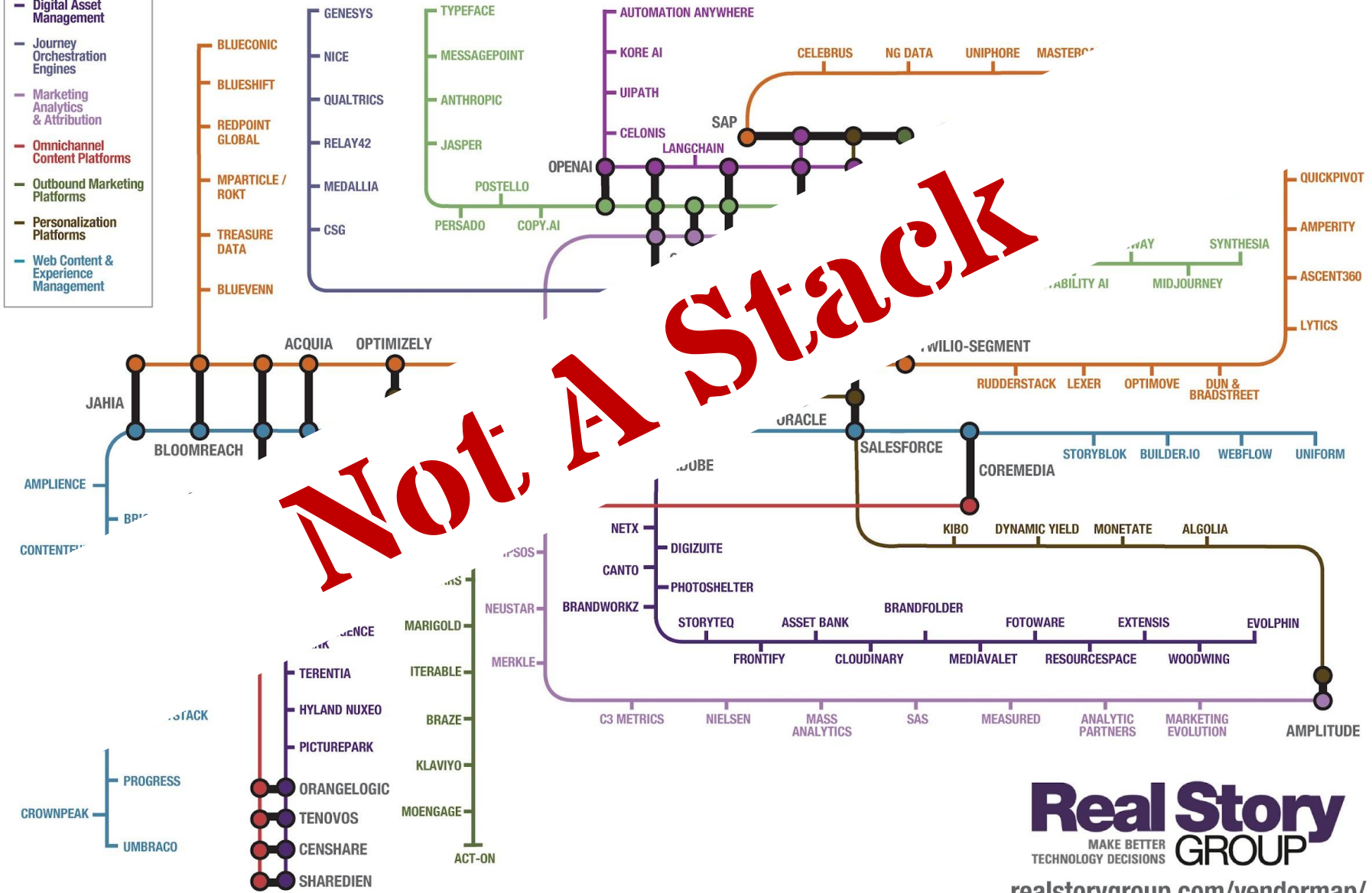
- 1 What the Map Is Not
- 2 What's Happening Overall?
- 3 Peek Into Some Markets
- 4 Key Takeaways

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Not A Stack

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MarTech Reference Architecture for the 2020s

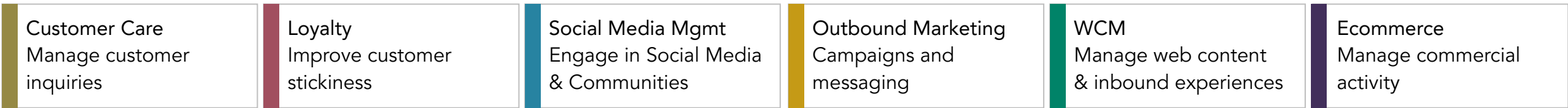
ENGAGEMENT CHANNELS



INTERACTION & DELIVERY ENVIRONMENTS

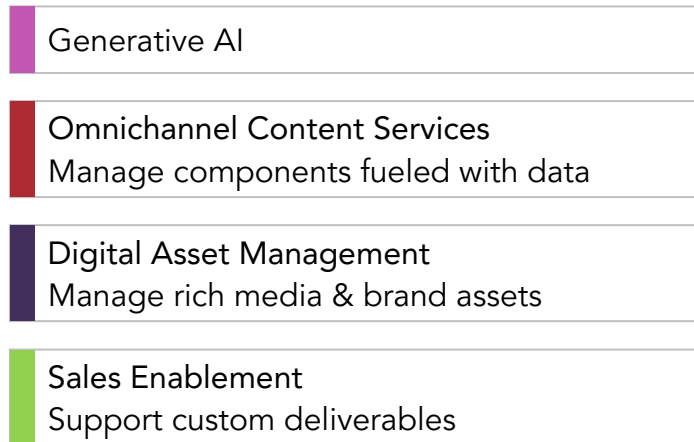


ENGAGEMENT SERVICES

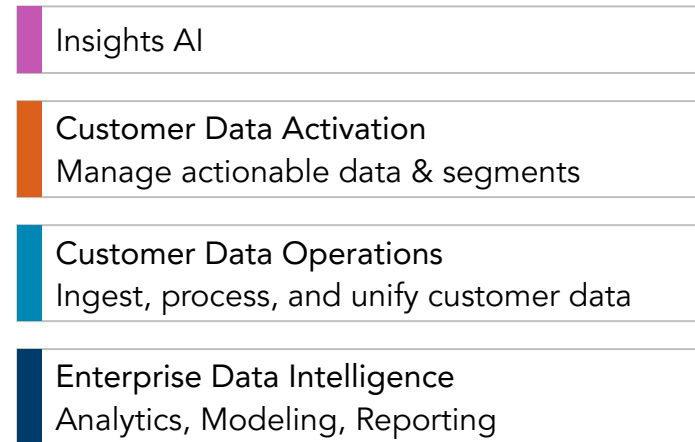


ENTERPRISE FOUNDATION SERVICES

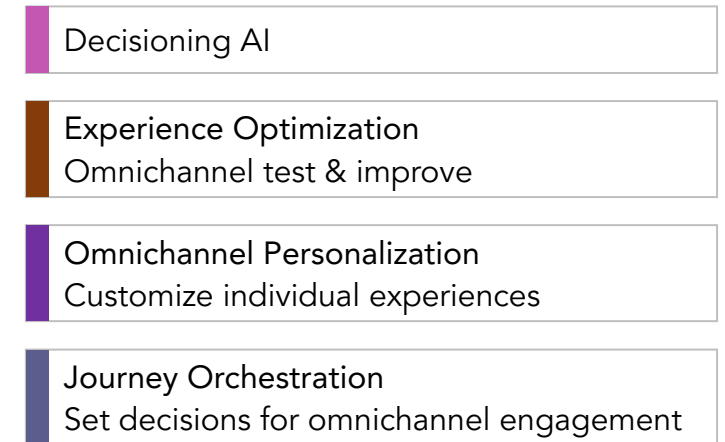
CONTENT & INFO



DATA



DECISIONING

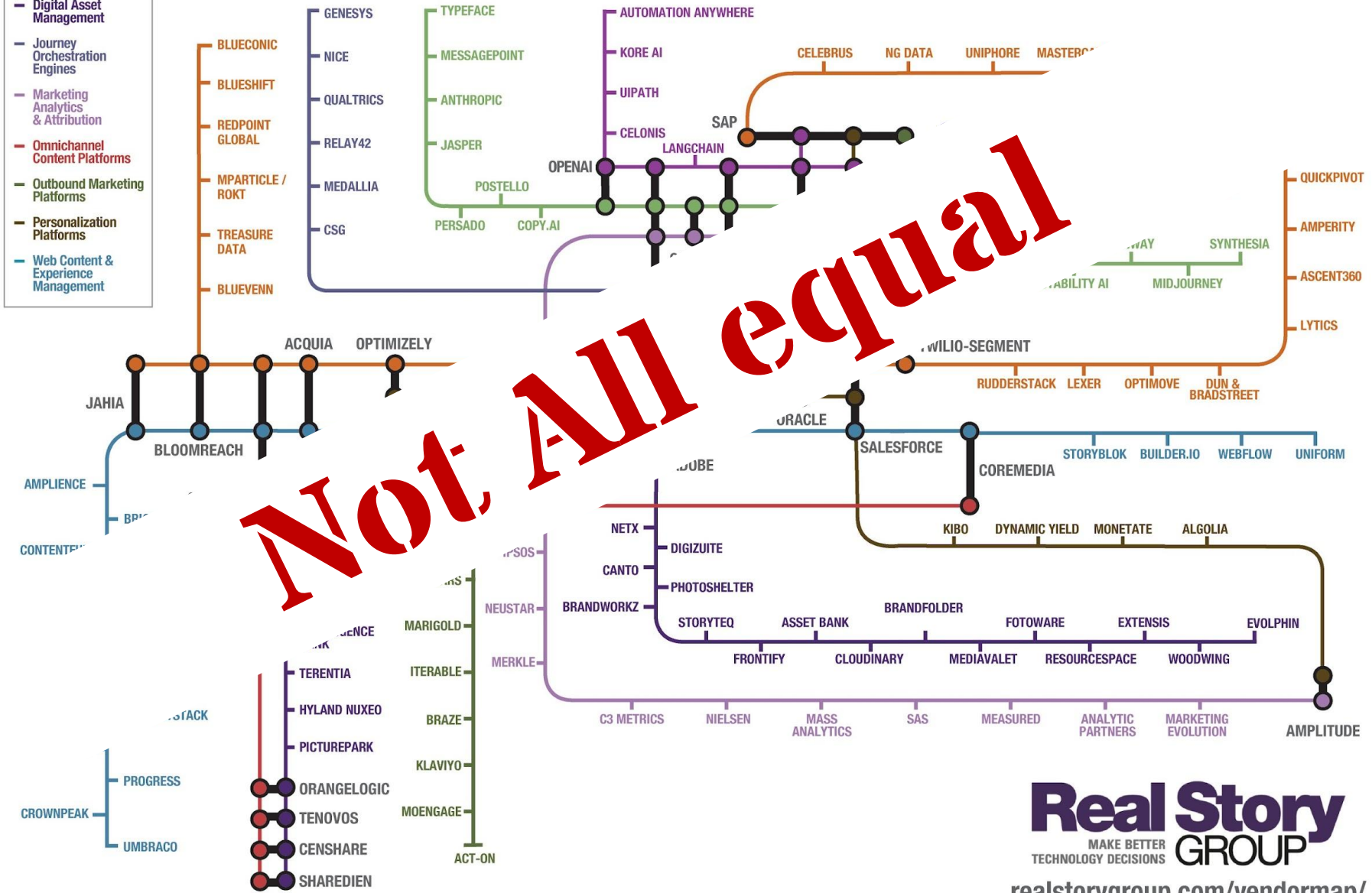


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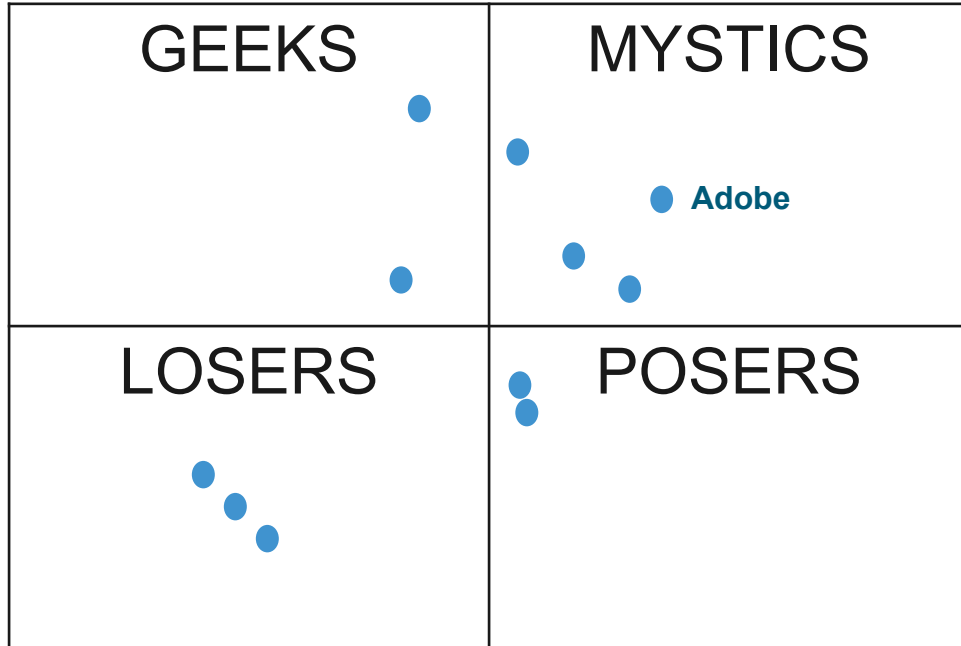


Not All equal

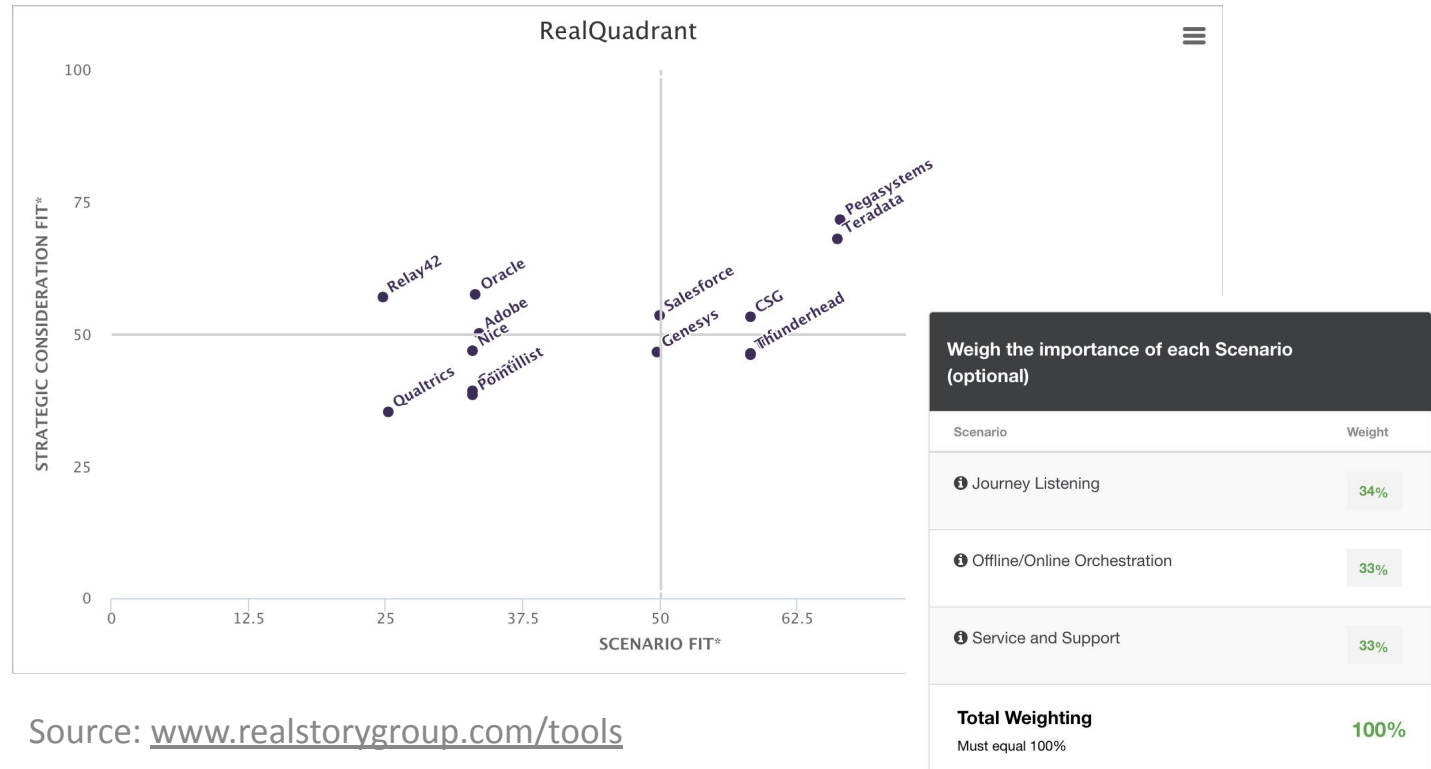


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How analyst firms see Adobe for Journey Orchestration, vs...



... Adobe in RSG's RealQuadrant



Source: www.realstorygroup.com/tools

Webinar Agenda



1 What the Map Is Not



2 What's Happening Overall?

3 Peek Into Some Markets

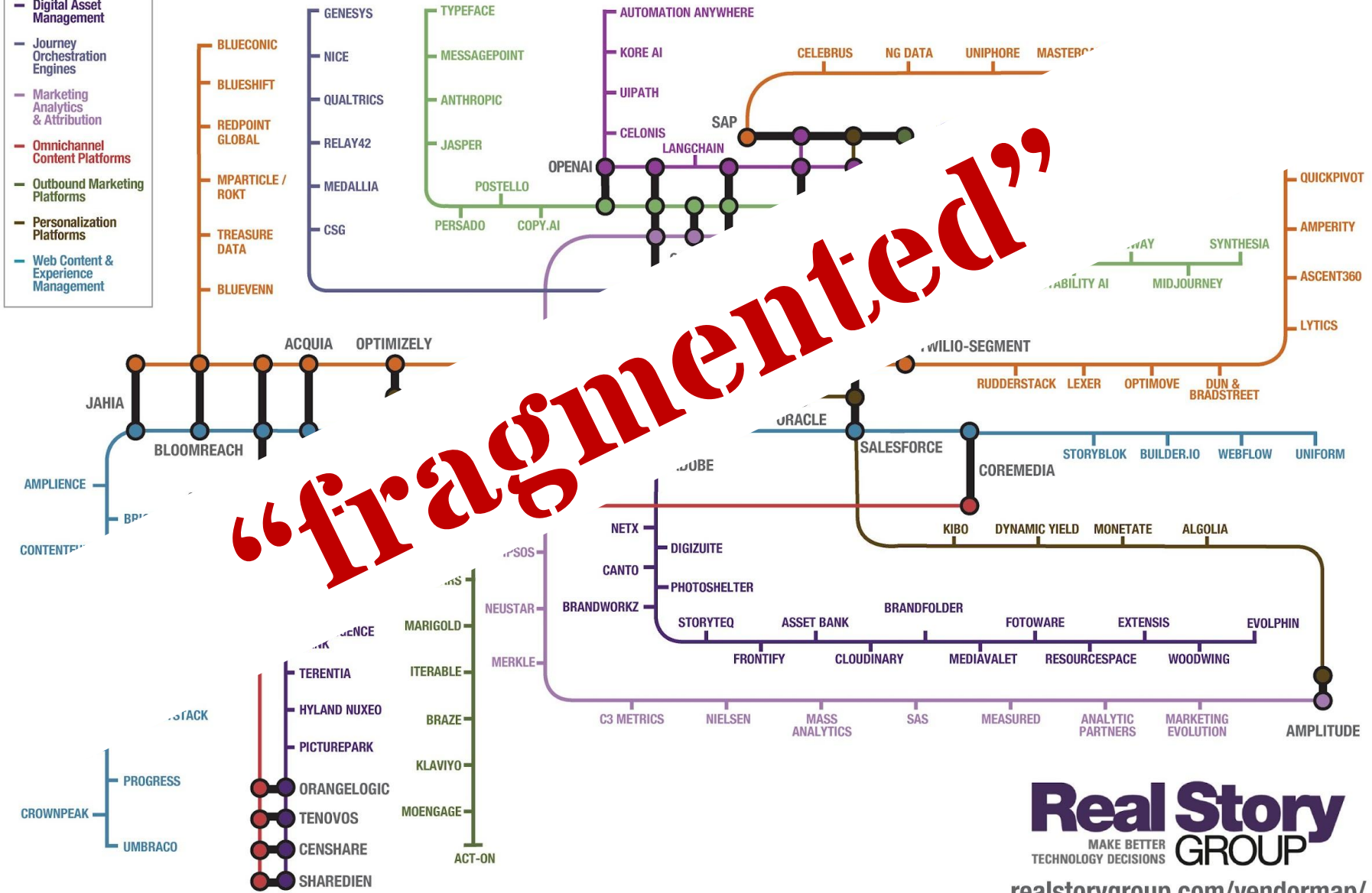
4 Key Takeaways

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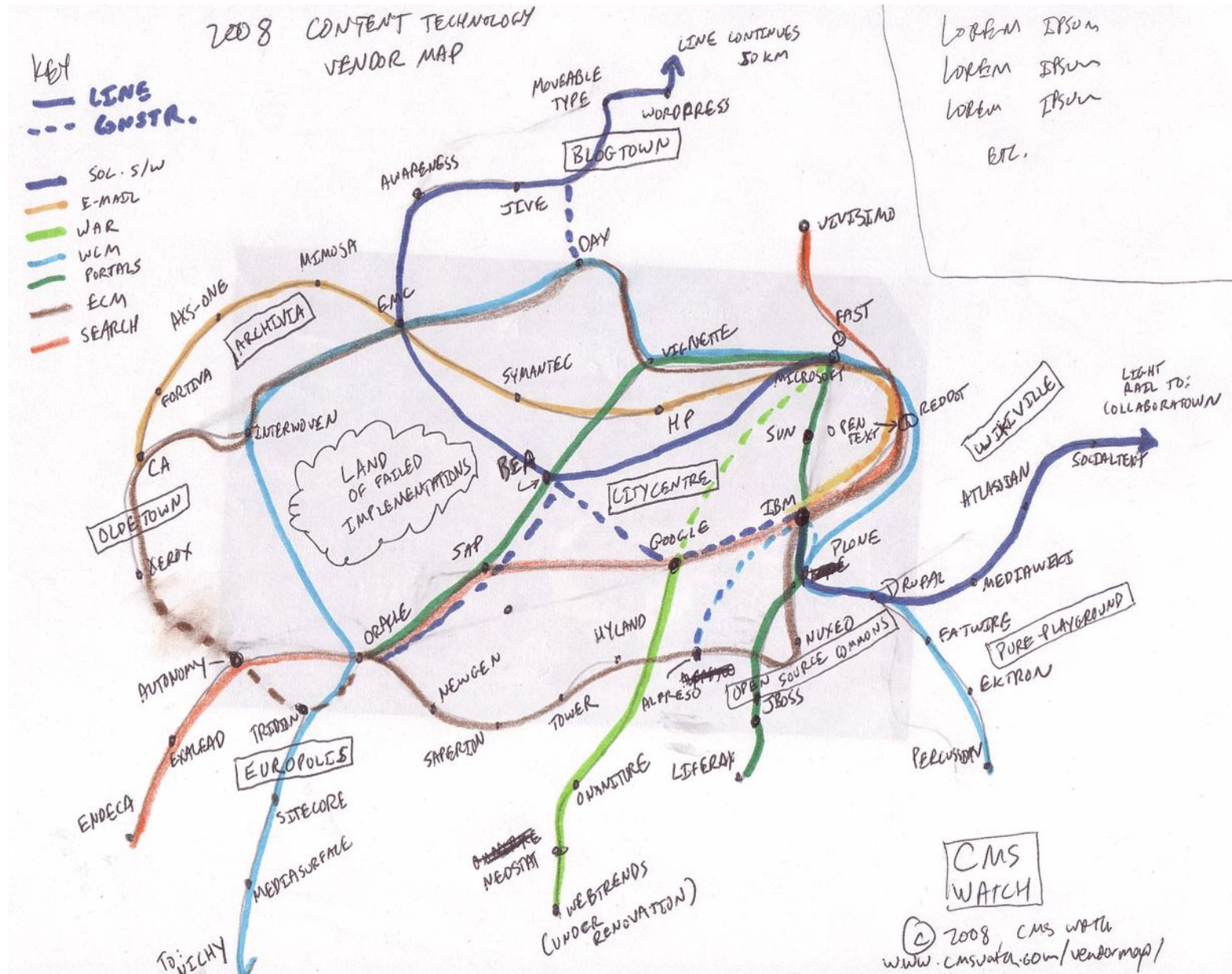


“Fragmented”

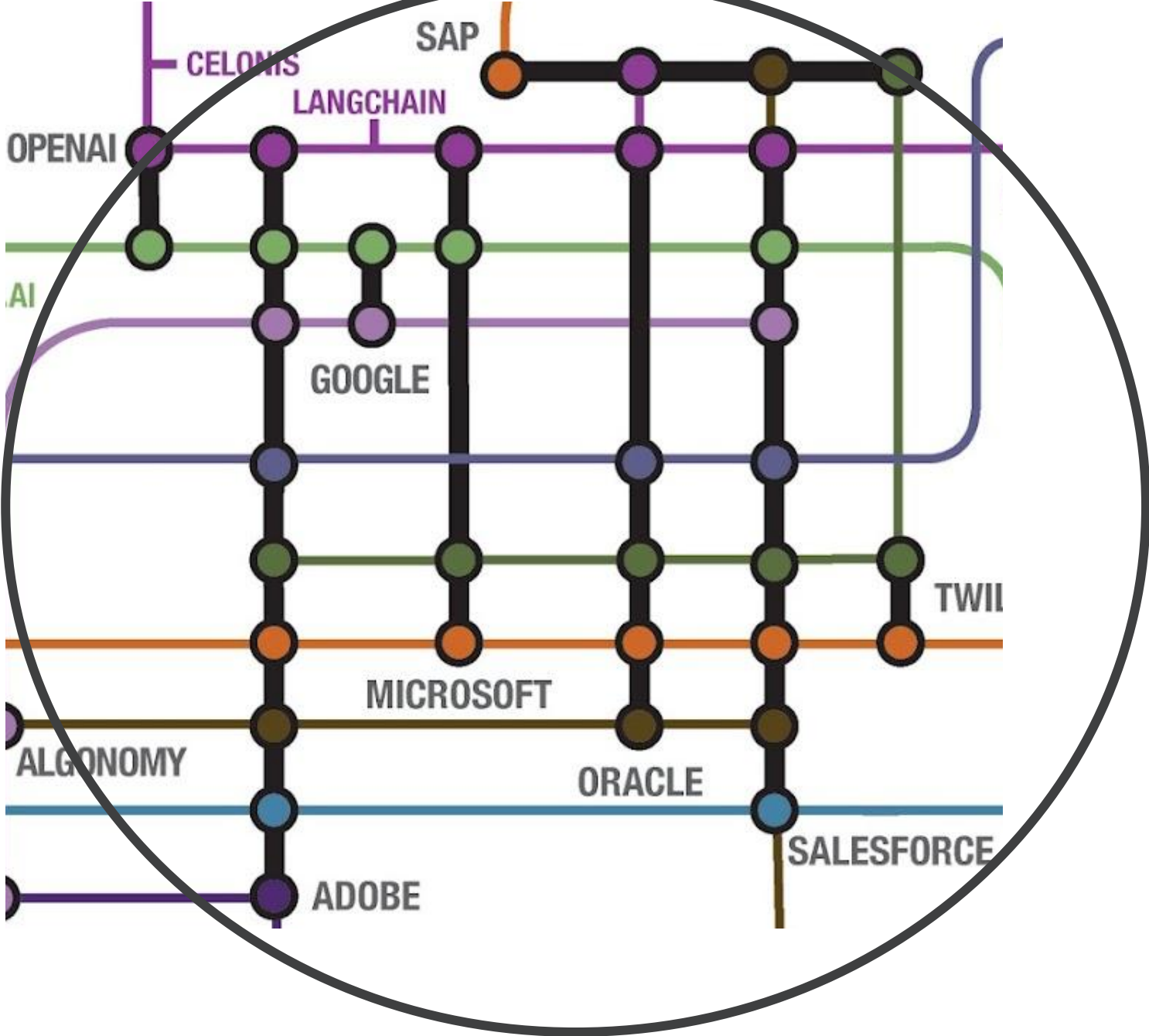
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Always Been Fragmented....



City Center



Stack Composability Wins: MarTech Vendors Deployed by 30 Large / Global Enterprises

ENGAGEMENT SERVICES

<p>Customer Care</p>	<p>Loyalty</p>	<p>Social Media / Search</p>	<p>Outbound Marketing</p>	<p>Web Content Mgmt / CMS</p>	<p>Ecommerce</p>
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ENTERPRISE FOUNDATION SERVICES

CONTENT & INFO

Generative AI	[PERSADO]	Jasper
Omnichannel Content Services	SITECORE	censhare
Digital Asset Management	Canto, SITECORE, orangelogic, bynder, ACQUIA, opentext, wistia, RevBase, Extensis, ECS, xytech	censhare, A, aprimo
Product Information Management	SALSIFY, inriver, servicenow, STIBO SYSTEMS	

DATA

Insights AI	ThoughtSpot, qualtrics, Google, aws
Customer Data Activation	blueconic, Optimizely, A, Meta, Google, Salesforce, LiveRamp, TEALIUM, lytics
Customer Data Ops	TREASURE DATA, A, snowflake, adverity, TEALIUM, aws, Informatica, Microsoft, panoply, Google
Enterprise Data Intelligence	Google, Microsoft, A, Numerator, Heap, alteryx

DECISIONING

Decisioning AI	
Experience Optimization	folloze, PathFactory, Bannerflow, GrowthBoo, conversica, creativex
Omnichannel Personalization	Google, Salesforce, PEGA, blueconic, A, Optimizely, ORACLE, lytics
Journey Orchestration	TREASURE DATA, Relay42, PEGA, CSG

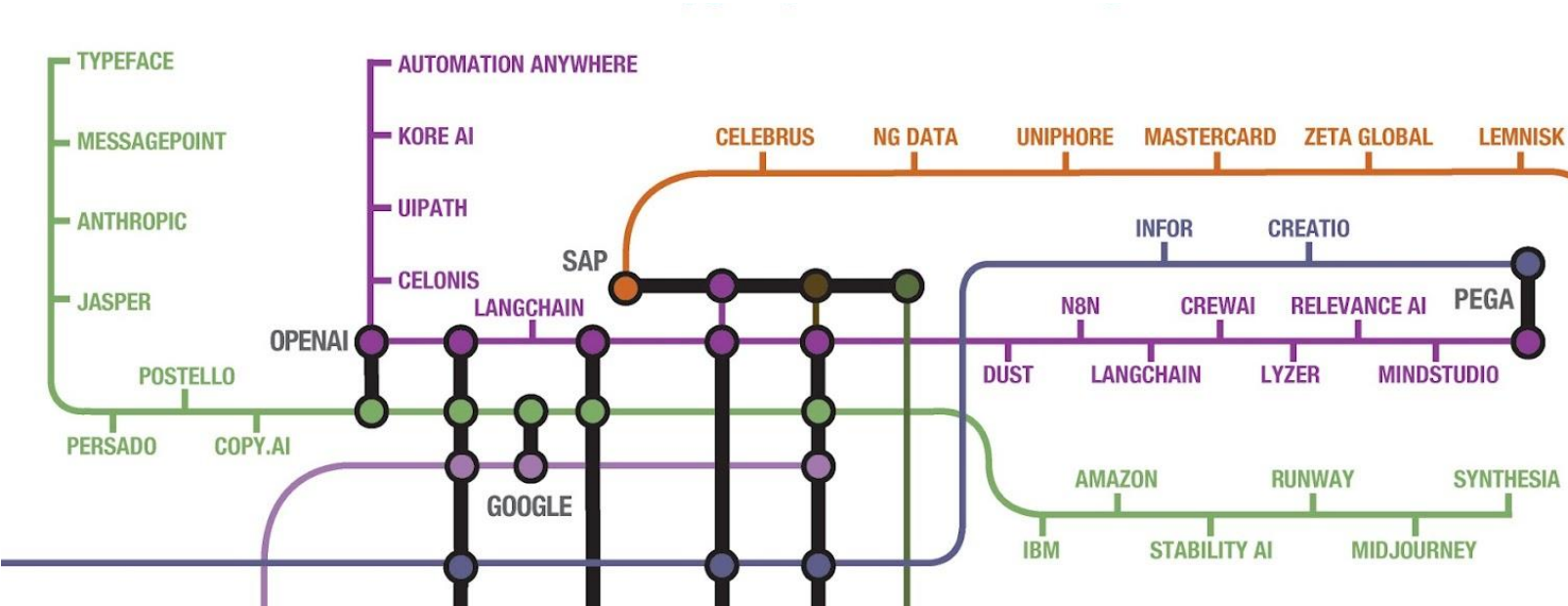
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AI & Agents for MarTech

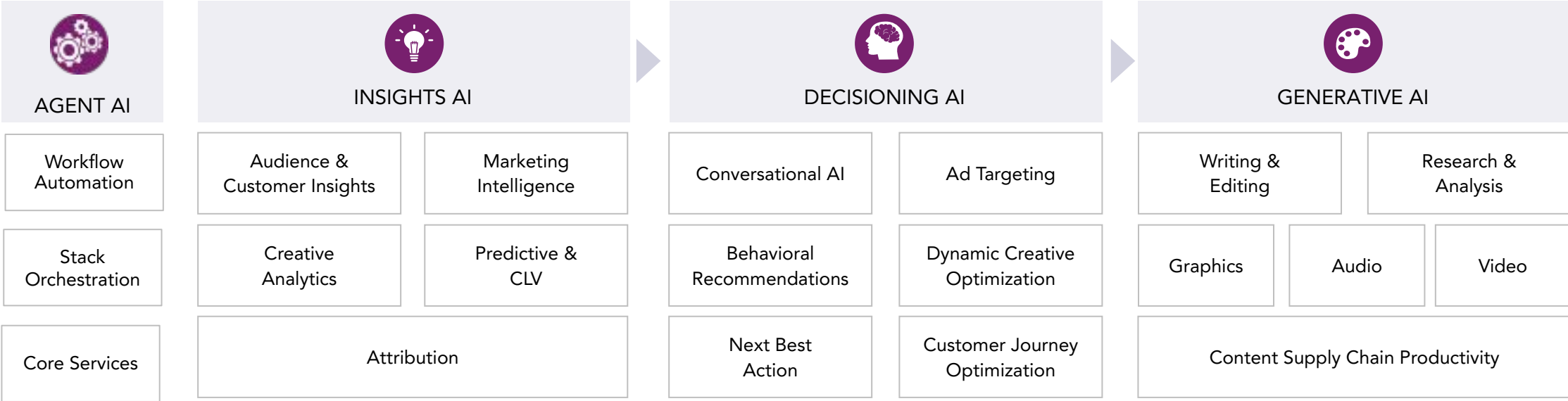
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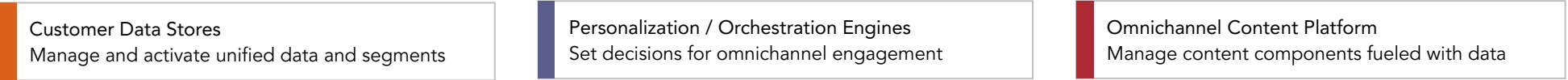
- Core AI and Agentic AI vendors are fundamentally different
- Latter builds on the former
- Both should be treated as a layer in your stack
- Both should be evaluated according to business use cases

MarTech AI Reference Model Overview

DIVERSE ENGAGEMENT SERVICE EXAMPLES



FOUNDATIONAL PLATFORMS



FOUNDATIONAL CAPABILITIES



RESPONSIBLE AI



WCM and Outbound (ESP /MAP) – Shrinking...

KEY

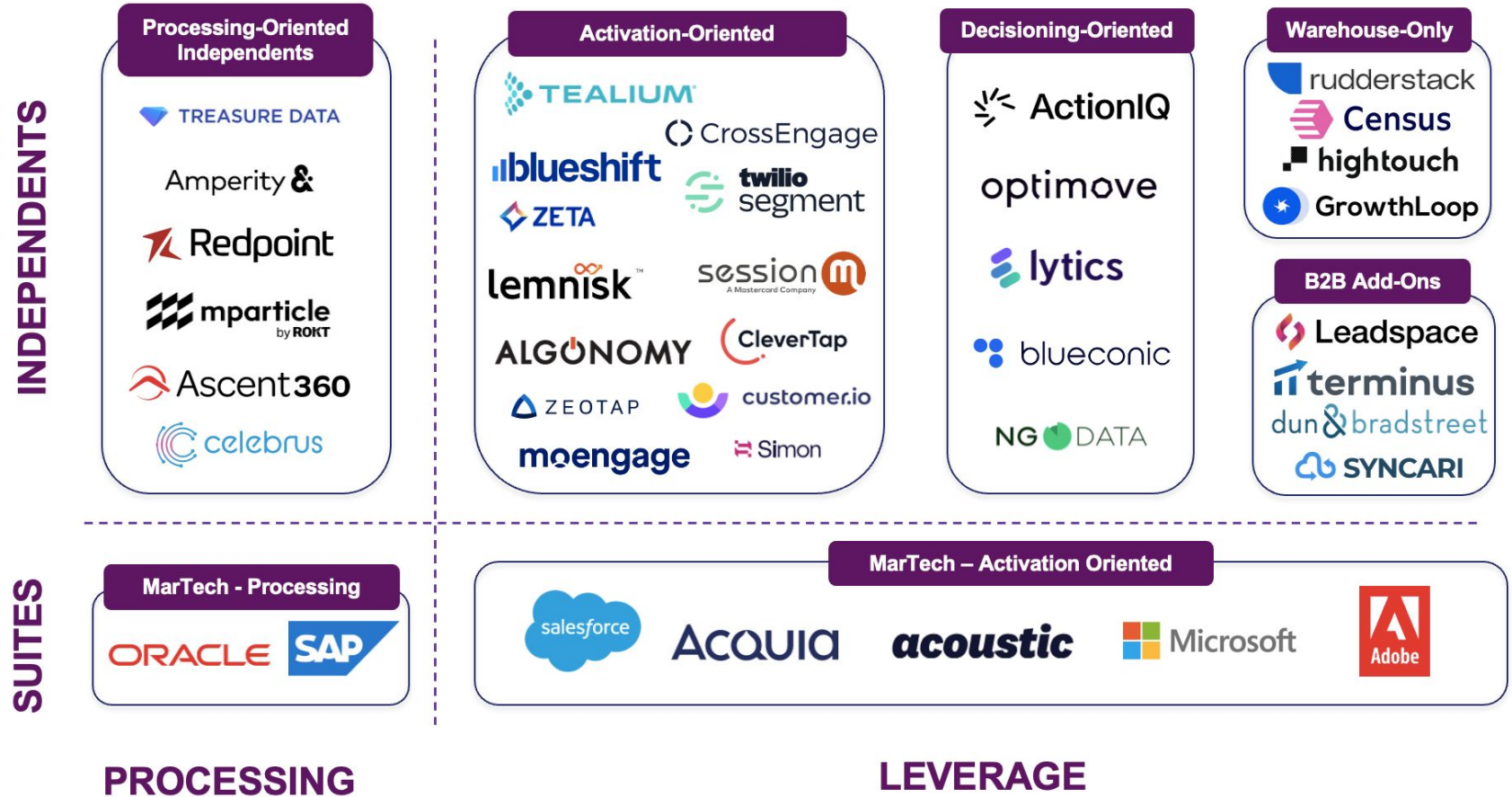
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CDPs: Rumors of Death Much Exaggerated

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Digital Asset Management: Road to 3.0 & 4.0

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DAM 1.0 STANDALONE LIBRARY

Single repository managing images, video, audio files through their lifecycle

Step up from shared drives or cloud sharing platforms

Disconnected from larger technical stack

Another *destination* to store and retrieve assets

DAM 2.0 CONNECTED SERVICE

DAM recognized as part of a connected stack

DAM is a critical part of workflow

Upstream and downstream integration

DAM supplying some systems of engagement

One-way flow of information

DAM 3.0 OMNICHANNEL CONTENT PLATFORM

Manage media, narrative, and data all as first-class objects

Support component-level management for omnichannel activation

Enable sophisticated, compound, mixed-media content

Measure effectiveness beyond traditional campaign analytics

2-way flow of information, including usage and derivations

DAM 4.0 PREDICTIVE CONTENT PLATFORM

Leverage analytics to suggest better performing assets

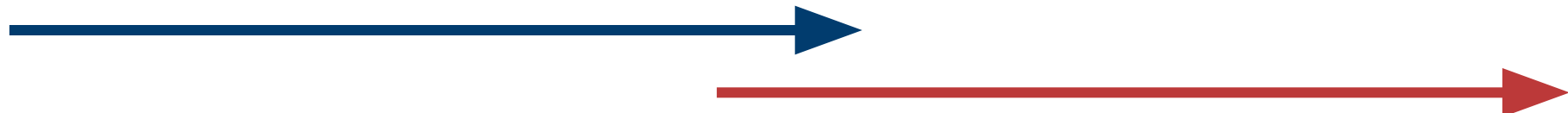
Query-able system to answer context questions

Real-time asset performance testing

Real-time asset adaptation

AI-driven content creation

Headless? Invisible?



Rethink Asset Management in an era of AI...

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Key Takeaways

1. Make strong decisions during turbulent times

Paralysis is never a friend to MarTech leaders

2. Build a composable stack

At least at the platform level – and avoid suite plays with evanescent promises

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3. Remember that you have many choices

The best platform is the best-fitting platform for your enterprise

4. Remain thoughtful about how you bring in AI

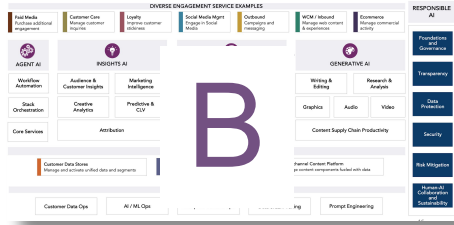
Develop a strategy and roadmap, and compel vendors to adhere to your environment

5. Rethink Asset Management in the Era of AI

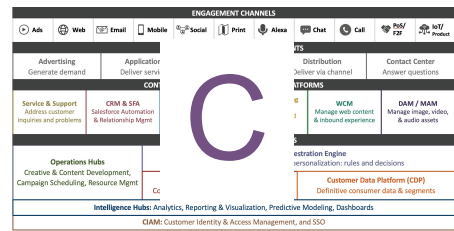
DAM 3.0 going from "nice" to "must"

6. Downshift Your Web CMS and Outbound Marketing Investment

Convert resources to your customer foundation layer



Tune Your AI Strategy



Optimize Your Stack



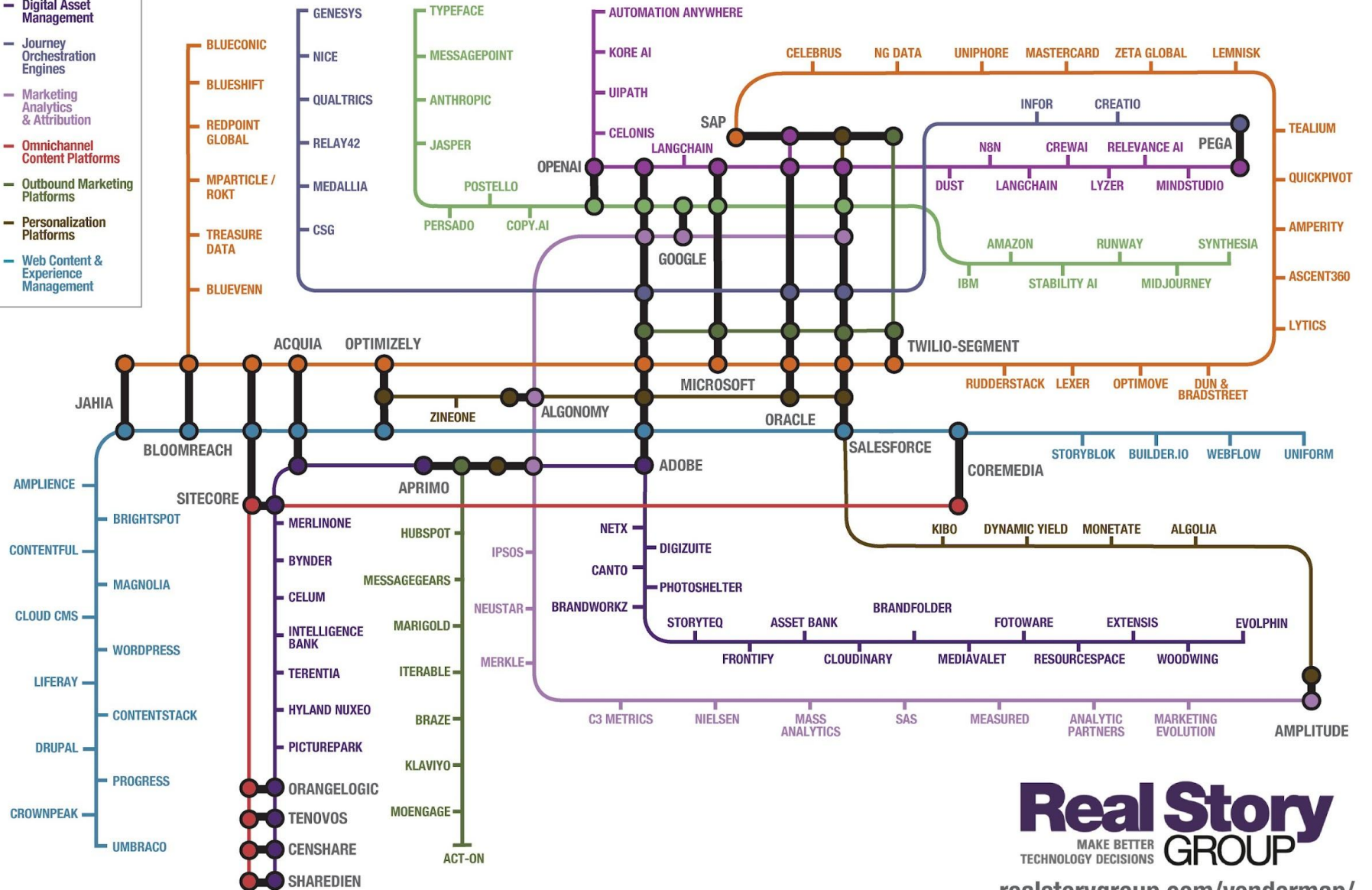
Learn from Peers

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explore@realstorygroup.com

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Ecommerce Platforms
Comprehensive Product Evaluations

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AI for Marketing
Comprehensive Product Evaluations