



IDC MarketScape

IDC MarketScape: Worldwide Agentic Marketing for B2C Enterprises 2026 Vendor Assessment

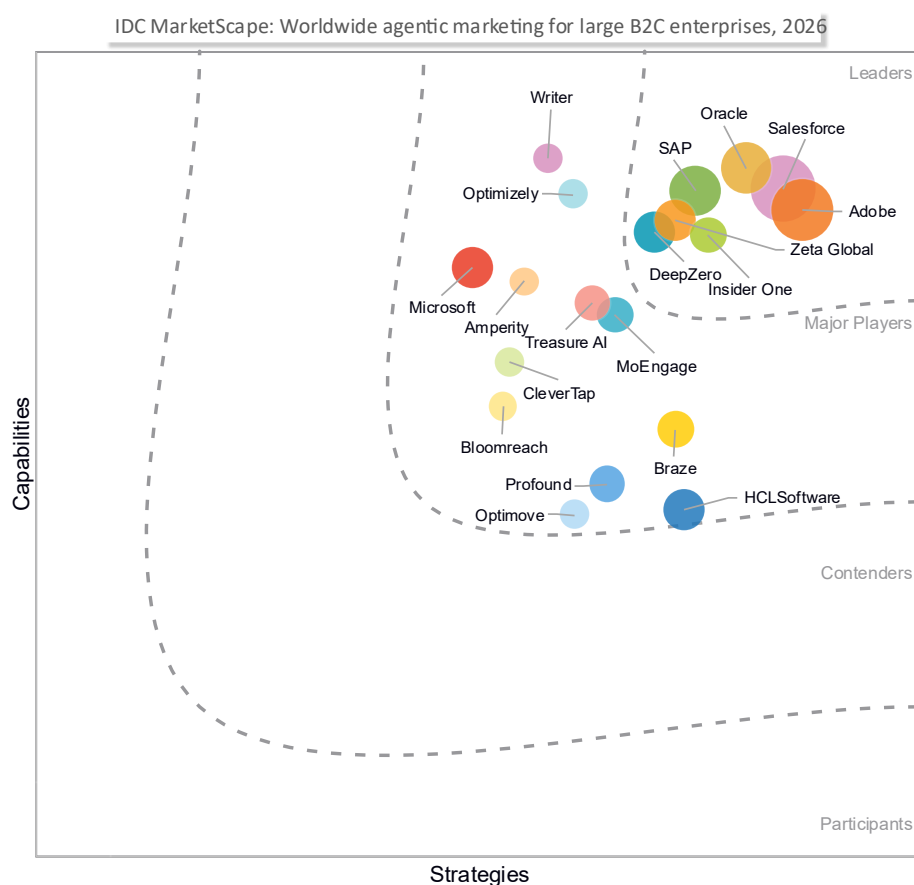
Gerry Murray

THIS EXCERPT FEATURES ADOBE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide agentic marketing for large B2C enterprises



Source: IDC, 2026

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Agentic Marketing for B2C Enterprises 2026 Vendor Assessment (Doc # US54113426).

IDC OPINION

Enterprise marketing organizations require agentic capabilities across a spectrum of use cases, not a single category of agent. IDC identifies five tiers of agentic capability relevant to enterprise marketing:

- **Reactive.** Prompt-driven assistants embedded inside marketing tools (e.g., "Write a subject line")
- **Triggered.** Executes specific marketing tasks when triggered or requested (e.g., "Add a subsegment")
- **Adaptive.** Manages or optimizes multistep marketing workflows (e.g., "Optimize journeys in-flight")
- **Autonomous.** Orchestrates multiple marketing workflows (e.g., "Design and execute a campaign")
- **Goal seeking.** Pursues strategic objectives and coordinate multiple systems (e.g., "Optimize margin for our fall product launch")

A precise definition of "agent" is therefore less operationally relevant than an assessment of the tier of agentic capability a use case requires. Cost, complexity, risk, business outcome, operational scope, and change management requirements differ materially across use cases and will determine the success or failure of the effort. These factors are crucial for understanding everything else about an agentic deployment, including prioritizing the use case road map; identifying key organizational, operational, and technical readiness roadblocks; assessing the appropriate level of autonomy and human-in-the-loop (HITL) supervision; and estimating ROI. Just because a narrowly scoped agent bound within a marketing automation platform can be in production in a day does not make that a good practice. This assessment therefore considers the full range of agentic technologies deployed in enterprise marketing, from simple assistants and copilots to advisors, multi-agent systems, and autonomous, goal-seeking agents.

Marketers are defining ROI through efficiency and productivity metrics first, then personalization-driven performance metrics, then formal revenue attribution, and finally a risk-adjusted view that accounts for governance failure modes. Nearly a third of marketing functions cite unclear ROI/business case as a top adoption barrier, and 36% cite high

implementation cost — a "vicious cycle" where difficulty proving ROI slows the very investment needed to generate the data that would prove it. Meanwhile, the upside is large: the 2026 IDC FutureScape for CMOs projects marketers will achieve five times the ROI on GenAI and up to 20 times the ROI with agentic AI by 2028, driven by personalization's effect on conversion, cart value, and churn.

Implications to the future work and practice of marketing

The ROI model for marketing is always a long-term proposition and typically difficult to attribute to any martech solution, not just AI. Despite that, there are transformational changes that agentic AI is imposing on marketing that are truly unique and have profound implications for the future work of marketing and the future practice of marketing. Namely:

Hybrid workforce

Agentic automation does not inherently mean fewer marketers. CMOs need to acknowledge that AI agents are a workforce; they make decisions, produce output, and contribute to outcomes just like any other worker, and no one hires dozens of employees without a management structure in place. Agents must be managed, and defining the scope of supervision is a crucial part of customer success, but scope of supervision remains an issue that has little best practice established. As a result, marketers need to carefully assess the cost and complexity criteria above to determine how many agents can be effectively supervised by human staffers.

Marketing as chat

A trend that has emerged in 2026 is the adoption of AI coworkers. Nearly all martech vendors use Anthropic Claude for their agentic UIs. Some have released branded coworkers, MCP servers, and are re-architecting their SaaS stacks around headless solutions. Each of these is designed to enable marketers to work in a conversational UX while delegating the system operations to AI. This is the most radical shift in marketing work since the dawn of martech more than 30 years ago. Marketers will be able to describe the business objectives they must deliver and have AI do much of the tedious clicking, menu picking, SQL searching, and cross-system workflow management that used to add enormous time-to-market friction to campaign execution.

Agentic mesh for CX

While marketers have an enormous amount of work to do to fully prepare, implement, and manage their agents, they must also think about the fact that marketing owns only a small portion of the customer experience. Therefore, agents that support marketing interactions must interoperate with all the other agents a customer touches, otherwise it is impossible to deliver a consistently high quality and continuously improving experience across

touchpoints. (See *Agentic Mesh for CX: Automating End-to-End Customer Experience Management*, IDC #US53802225, October 2025).

AI marketing roles

New roles will emerge and old ones will be redefined in some measure. But the most important organizational change is creating a center of AI excellence for marketing. It should be run by AI-savvy marketers, with potential roles such as VP of marketing AI, agentic engineers, workflow optimization specialists, prompt/skill/connector managers, agentic testing, and best-practice teams. Among other things, the AI COE should act as a liaison across marketing, IT, legal, and security; define frameworks for readiness assessments, use case prioritization, and agent interoperability; identify who can build and deploy from pilot to production and the criteria for doing so; continually capture and institutionalize best practices, establish standards for agent design and human oversight; and conduct cost and risk analysis.

Agentic shoppers represent a trillion-dollar channel

Agentic shoppers are set to play a significant role in the market in the next several years.

The great replatforming

IDC predicts that agentic shoppers will represent more than \$1 trillion of economic influence by 2033. That is a significant portion of U.S. retail digital commerce and therefore presents massive share risk for brands that are not prepared. This scale of economic replatforming has happened three times before: when websites became web stores, when mobile transactions became trustworthy, and when social media became shoppable. In each case, the same questions about technical protocols, legal jurisdictions, identity, authority, validity, payment rails, and cultural acceptance needed to be answered in different ways, which took years. But once they were resolved, each replatform scaled upon its predecessor, and laggards paid dearly for their delays.

From reach to response

Agentic shoppers are the first channel in 100 years in which database marketing is irrelevant. Marketing to agents is not about reach; it is about response, and that is a huge sea change that hardly any brands are ready for. Conventional go to market starts with, for example, blasting emails to a million people out of 100 million in a database, engaging with up to 2% of them, and transacting with a few dozen, which might take days or weeks. Agentic shoppers are in the market with the context needed to act in real time, whether that is one of many steps in a B2B procurement model, or a recommendation or purchase in a B2C model. By the time a conventional email blast gets opened by the human principal an agent represents, they may already be using your competitor's product — or worse. Agents consume data to personalize an offer to an agent takes a low-latency decisioning

infrastructure across front- and back-office systems (loyalty, pricing, inventory, fulfillment, legal, PIM, OMS, CRM, etc.) and the brand that can make the most acceptable offers the fastest will win most deals, and in some markets, potentially all of them.

Therefore, despite what we will all look back on as an emergent period of immaturity in agentic marketing, it is imperative that marketers be on the leading edge of agentic preparation. This does not necessitate scale, but demands that enterprises understand all the layers of organizational, operational, technical, and legal capabilities for what may emerge as a global agentic economy.

IDC MARKETScape VENDOR INCLUSION CRITERIA

To be included in the IDC MarketScape, the vendors must satisfy the following criteria.

Core platform requirements

The vendor must:

- Provide a software platform that enables the creation, deployment, and management of AI-driven marketing agents
- Support autonomous or semi-autonomous execution of marketing workflows, not just insight generation or copilots
- Offer capabilities for agent orchestration, including coordination across multiple workflows, systems, or agents
- Provide integration/interoperability with marketing systems (e.g., data sources, activation channels, enterprise applications)
- Include governance capabilities such as observability, auditing, compliance, and policy enforcement

Agent capabilities

The vendor's agent offering must:

- Deliver prebuilt marketing agents (packaged use cases with defined outcomes) and/or enable custom agent development via builder/studio/composer environments
- Demonstrate production-level deployment of agents (beyond pilot or experimental use)
- Support HITL supervision, including controls, overrides, and feedback mechanisms
- Enable workflow automation at scale, including multistep, cross-functional processes

Market presence and adoption

The vendor must have:

- Have commercially available offerings with active enterprise or midmarket customers
- Demonstrate customer adoption of agentic functionality, including:
 - Agents in production
 - Multiple workflows automated
 - Measurable usage/activity levels

Exclusion considerations

Vendors that fall under the following are excluded from assessment in this IDC MarketScape:

- Vendors limited to point solutions such as AEO, generative AI, analytics tools, etc.
- Vendors lacking demonstrable agent deployment in real-world marketing environments
- Foundational models or development platforms without prebuilt agents tailored for marketing use cases

ADVICE FOR TECHNOLOGY BUYERS

Agentic marketing is a structural shift in how marketing organizations operate, make decisions, and engage customers. At enterprise scale, that shift touches procurement, security, legal, and often a dozen business units before it touches a single campaign. Wave 1 of IDC's *Future Enterprise Resiliency and Spending (FERS) Survey* (January 2026) found more than 60% of buyers evaluating agentic AI put transparency into business, IT, and security risk above every other requirement, and ranked a vendor's road map and extensibility as the single most valuable thing a vendor can show them.

The questions that matter most at this scale go beyond whether a platform can execute a workflow, since most can. Enterprises are concerned about whether the platform can be governed, audited, and scaled across a global marketing organization of multiple brands, regions, and a complex organization of internal and external teams.

Key recommendations for enterprise buyers of agentic marketing solutions center on the following areas:

- **Road map.** Map the specific use cases in scope (whether journey orchestration, offer decisioning, or content operations) and require vendors to demonstrate each one against your data, not in a demo environment, before shortlisting. Prioritize use cases into tranches no more than a dozen at a time and identify readiness roadblocks that must be resolved before the next tranche can be implemented.
- **Readiness.** Fund organizational readiness as its own workstream. An enterprise-grade agentic platform sitting on fragmented data and undefined cross-functional

workflows will underperform no matter how sophisticated it is. Treat data unification, process mapping, and change management as a formal, budgeted part of the deployment, not an assumed side effect of the platform purchase.

- **Governance.** Require governance depth that satisfies compliance, not only marketing. Every platform in this evaluation claims governance capabilities. What varies is whether that governance can satisfy a compliance, legal, or security review rather than only a marketing stakeholder. Require documented audit trails, explainability for agent decisions, and a clear answer for how the platform handles conflicts between agent behavior and policy in regulated markets.
- **Interoperability.** Map integration against the full stack, including systems that marketing does not own. Agentic marketing at this scale draws on CRM, CDP, commerce, and often data platforms outside marketing's direct control. Require vendors to demonstrate integration with those systems specifically, including support for Model Context Protocol (MCP), Agent2Agent (A2A), universal commerce protocol (UCP), x402, and other emerging interoperability standards, and weigh a vendor's answer on data latency as seriously as its answer on capability.
- **Token transparency.** Model pricing against production-scale usage, not pilot usage. Usage-based pricing can look attractive at pilot volume and become unpredictable at production scale. Model cost scenarios against realistic enterprise usage before signing, and negotiate a structure that keeps vendor incentives aligned with marketing performance as usage scales into hundreds of thousands of interactions.
- **Live pilots.** Pilot with executive sponsorship and the authority to act on the result. A proof of concept that never touches real customer data or live channels will not tell an enterprise buyer what it needs to know, and neither will one without executive sponsorship. The strongest results come from pilots run against a genuine use case, with success metrics defined up front and the authority in place to scale or kill the program based on what the pilot shows.
- **Supervisory framework.** Map the org chart for agents before volume makes it unavoidable. At enterprise scale, agent proliferation is the default outcome. An email manager can plausibly supervise a dozen content agents; a campaign manager cannot supervise an unbounded number spanning audience management, channel optimization, and personalization. Map agent ownership to the organizational chart before deployment.
- **Budgeting.** Set a multiyear timeline and fund all initiatives in that timeline as one project. Agentic marketing at enterprise scale is a multiyear capability build. Organizations that budget it as a single-year software purchase will stall when the second and third year of organizational work becomes visible. The vendors best positioned to support that timeline have a track record of iterating with enterprise customers over multiple product cycles, not just a strong initial deployment.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each criterion outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Adobe

After a thorough evaluation of Adobe's strategies and capabilities, IDC has positioned the company in the Leaders category in the 2026 IDC MarketScape for worldwide agentic marketing for B2C enterprises.

Adobe's agentic AI strategy for marketing now centers on Adobe CX Enterprise Coworker, which automates marketing and customer experience workflows across Adobe's CX applications and third-party systems. CX Enterprise Coworker (generally available since September 2025) is an evolution of Experience Platform Agent Orchestrator, and is the reasoning engine that coordinates multi-agent collaboration across Adobe's purpose-built marketing agents spanning audience building, journey planning, experimentation, data insights, site optimization, and product support. Adobe's Coworker Chat, which the company indicates is adopted by more than 70% of eligible customers, enables teams to interact with both Adobe-native and third-party agents.

Firefly, commercially released in September 2023, underpins content generation across Adobe Creative Cloud and Adobe CX Enterprise. Adobe's agentic framework connects to partners such as AWS, Microsoft, SAP, ServiceNow, Genesys, and Workday for cross-ecosystem agent execution.

Strengths

- CX Enterprise Coworker, coordinates multi-agent collaboration across the marketing stack, turning natural-language conversations into automated actions grounded in customer context. Strong early custom adoption across Coworker Chat, Journey Optimizer, Adobe Real-Time CDP, and Adobe Experience Manager.
- Adobe GenStudio for Performance Marketing, available since October 2024, enables marketing and creative teams to plan, generate, and measure on-brand content variations across paid media, email, social, and display. Powered by Firefly and third-party LLMs, it integrates natively with Meta, TikTok, LinkedIn, and Amazon Ads for near-instant activation.
- Firefly capabilities help differentiate the broader platform. Its commercial-safety foundation (models trained on licensed and public-domain content with expired copyright) give enterprises confidence, which is supported by IP indemnification that remains rare in the market. Adobe has paired this with an open-model strategy,

hosting more than 30 third-party models from providers such as Google, OpenAI, and Runway alongside its own, positioning Firefly as an orchestration layer rather than a single-model tool. To provide organizations with greater control, Adobe's customization now spans two tiers: Firefly Custom Models offers self-serve fine-tuning for single-concept, brand-specific styles, while Firefly Foundry lets enterprises build custom models from their own IP catalogs.

Challenges

- Adobe's coworker is interface agnostic, exposing its capabilities so customers can invoke it directly from Microsoft 365 Copilot, Anthropic Claude, OpenAI, or their own agentic frameworks, without operating inside an Adobe application. However, many users describe cross-platform orchestration as overly complex, making it challenging for Adobe to displace incumbents in areas where its CX Enterprise footprint is limited. Adobe's agents are built for enterprise scale, which creates an adoption barrier for midmarket companies lacking the data infrastructure and governance maturity to activate them fully. Realizing the platform's orchestration potential requires unified customer profiles and real-time pipelines that smaller organizations are still building. Adobe is bringing to market CX Enterprise Coworker for Teams, a prepackaged campaign module for smaller, more agile teams.
- AI-native start-ups now offer standalone generative content tools and purpose-built agentic platforms with many brands achieving faster time-to-value and lower integration overhead. As foundation model capabilities converge, Firefly's edge may narrow, but its orchestration ability (e.g., selecting the best model based on volume/speed/cost/quality) and its IP indemnification remain strong strategic levers in enterprise deployments.

Consider Adobe when

Adobe's agentic AI platform suits large enterprises and midmarket organizations running complex, multichannel customer experience programs, particularly those already using Journey Optimizer, Real-Time CDP, Workfront, or Experience Manager and needing to scale content production, personalization, and campaign orchestration. B2B enterprises with complex buying cycles and B2C brands managing high-volume content supply chains get the most value from Adobe's integrated AI agents and GenStudio. Large enterprises will benefit most from Adobe CX Enterprise Coworker when the work spans multiple steps, Adobe applications, data sources, or teams, and the customer wants automation with permissions, approvals, and human oversight built in.

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market definition

IDC defines agentic marketing platforms as software platforms that enable organizations to create, deploy, and manage AI-driven marketing agents capable of setting goals, perceiving context, and taking autonomous or semi-autonomous action across marketing systems and channels, then adapting that action based on the outcomes it produces. The defining trait is genuine agency: a platform in this market plans a course of action, executes it through connected tools and systems, and refines its own approach over time rather than repeating a fixed script.

These platforms extend beyond insight generation and single-task copilots to action-oriented execution, orchestrating end-to-end marketing processes such as campaign operations, content activation, audience management, offer decisioning, and performance optimization. A platform that only analyzes data or drafts content at a person's direction, without taking independent action on it, sits outside this market regardless of how sophisticated its underlying AI model is.

Core characteristics include:

- **Prebuilt and custom agents.** Packaged use cases with defined outcomes, alongside builder or studio environments for tailored agent development
- **Workflow orchestration.** Coordination of multistep, and often multi-agent, processes across campaigns, channels, and systems
- **Interoperability.** Integration with data sources, activation channels, and enterprise applications, including support for emerging standards such as Model Context Protocol
- **Governance and oversight.** Controls for supervision, auditing, compliance, and human override, with observability into what an agent did and why
- **Production maturity.** Demonstrated deployment in live marketing environments, not solely pilot or experimental use

This market has emerged from, and is distinct from, the broader AI-enabled marketing platforms category IDC assessed in 2025. That prior generation embedded predictive and generative AI into existing marketing automation, CRM, and campaign management tools to improve personalization, content creation, and reporting. Agentic marketing platforms represent the next step: AI that acts on marketing workflows directly rather than only informing the person who does. Foundational models, single-task copilots, analytics-only tools, and marketing automation platforms that have not moved past pilot deployment of agentic functionality fall outside this market definition, consistent with the exclusion considerations above.

Related research

- *IDC Survey: The Martech Stack in Transition — AI-Native Vendors' Race to Catch Budget, Buyers, and the Baton* (IDC #US54585126, July 2026)
- *Agentic Commerce Reality and the Last Mile of Human Customer Experiences* (IDC #US54460426, April 2026)
- *Tech Buyer Survey Spotlight: How Is AI Improving the Ability of Brands to Personalize Customer Interactions?* (IDC #US54427326, March 2026)
- *IDC FutureScape: Worldwide Agentic Artificial Intelligence 2026 Predictions* (IDC #US53860925, October 2025)
- *IDC Market Glance: Agentic AI Applications, Tools, and Technologies, 2Q25* (IDC #US53565925, June 2025)

Synopsis

This IDC MarketScape evaluates agentic marketing platforms available to enterprise organizations and provides essential guidance for technology buyers in this segment. This study defines the market, evaluates vendors serving enterprise buyers, and assesses platforms against a broad definition of agentic AI. IDC finds that autonomy and system integration are largely solved problems in this market, while independent judgment and cross-agent coordination remain works in progress. Given the governance, ROI, and security scrutiny enterprise deployments face, IDC advises buyers to evaluate platforms as they would evaluate a new hire, with clear supervision, defined scope, and ongoing performance review.

"Enterprise buyers should scrutinize vendors' agentic marketing solutions on interoperability, governance, and road maps as well as on proprietary IP, best practices, data assets, and cost transparency because at scale, those are the defining differentiators," said Gerry Murray, research director, Enterprise Marketing Applications and Agents at IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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