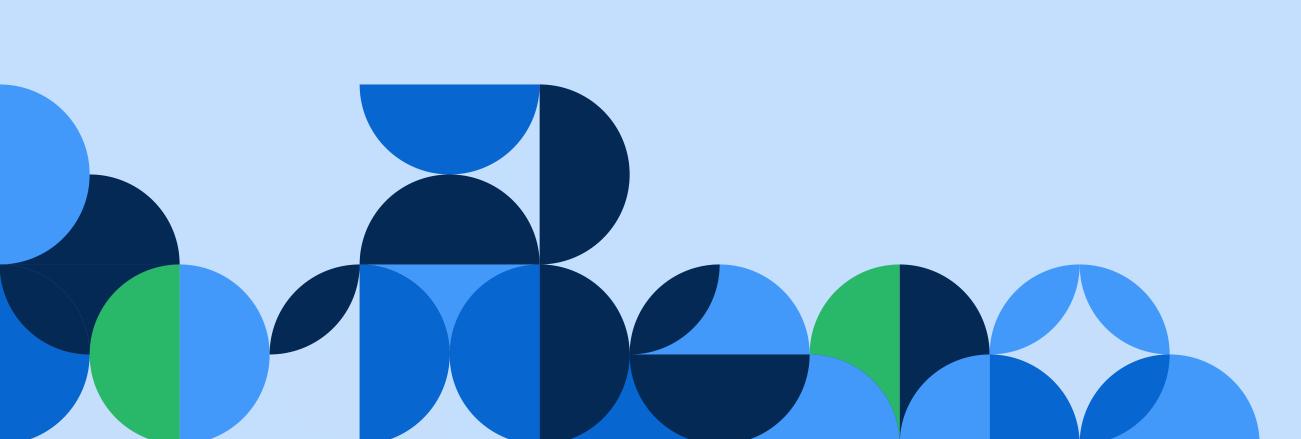
### 2025 REPORT

## Marketers and AI: Navigating New Depths

Fully committed to GenAI, marketers are diving deeper. How can they achieve success with agentic AI? And are they ready as quantum appears on the horizon?







#### FOREWORD:

### Marketers dive deeper into agentic Al

Marketers are ahead of the curve when it comes to GenAI, which is the new status quo for marketing departments worldwide. Many have the tools and experience to leave GenAI's safe, shallow waters and dive deeper into the uncharted territory of agentic AI.

The research shows that marketing departments across the board have made huge progress with GenAI in just 12 months. While some are rapidly progressing with agentic AI use, others are still in assessment mode. Based on our research, marketers were classified into three categories: Adopters, Planners and Observers. Adopters are already using agentic AI today, Planners intend to within the next year and Observers intend to within the next two years.

There's a wide adoption gap between the Adopters and Observers, and our research data reveals a clear truth: Your AI maturity today determines what's possible for you tomorrow. It also finds that as marketers adopt agentic AI, quantum computing moves within reach.

This report is based on a new survey of 300 organizations worldwide, ranging from SMBs (small and midsize businesses) to enterprises with 10,000+ employees. The respondents are marketers who are decision makers at organizations across a range of industry sectors.



The research reveals the behaviors and strategies that Adopters are using to deploy agentic AI. It also explores the numerous benefits and barriers to success along the way.

#### AI Glossary

**Generative AI (GenAI)** systems learn patterns in existing data to produce new content, such as text, images or code.

**Agentic AI** systems operate autonomously to make decisions without human input. They interact with operational workflows and execute more complex tasks.

Quantum computing uses the principles of quantum mechanics to process information using qbits, which can represent multiple states simultaneously. It can solve complex problems much faster than classical computing.

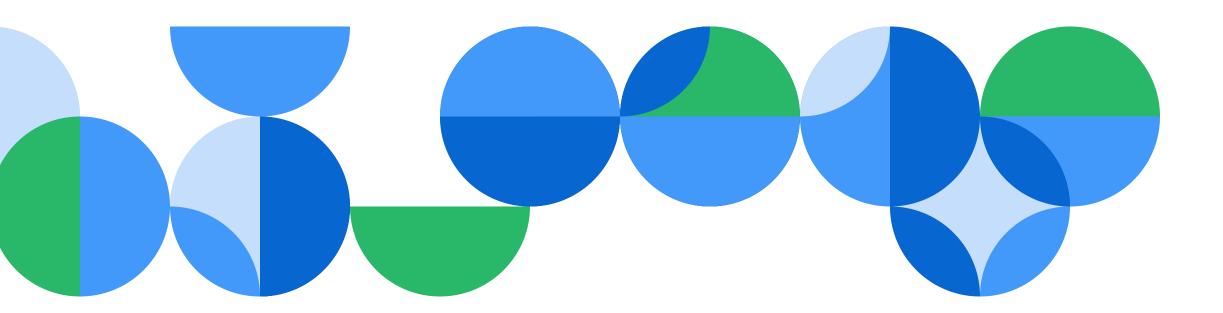
This report is designed to guide you on your journey from mastering GenAI to testing the waters of agentic AI and considering whether quantum computing is in your future. We present an up-to-date account of how marketing departments are using GenAI and agentic AI, and are beginning to consider the possibilities of quantum computing.

#### We will examine:

- The extraordinary rise of GenAI, and its associated benefits for ROI.
- Why the marketers with the most GenAl experience are ahead of the pack.
- The revolutionary possibilities of agentic AI, and its impact on ROI and operational efficiency.
- The key challenges marketers face when moving to agentic AI.
- How Adopters are finding solutions to these challenges.
- What steps Observers and Planners can take to catch up to Adopters.
- How marketers can start getting ready for quantum computing.



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## Marketers are poised to move beyond the basics of GenAl

#### AI Glossary

**Large language models (LLMs)** are machine learning models designed to predict and generate plausible language.

**Small language models (SLMs)** are reduced versions of LLMs created for specific tasks or environments.

**Digital twins** are virtual replicas of physical systems (such as a factory) that mimic real-world states and can be used to train AI.

**Synthetic data** is artificially generated data that mimics real-world data while avoiding security issues.

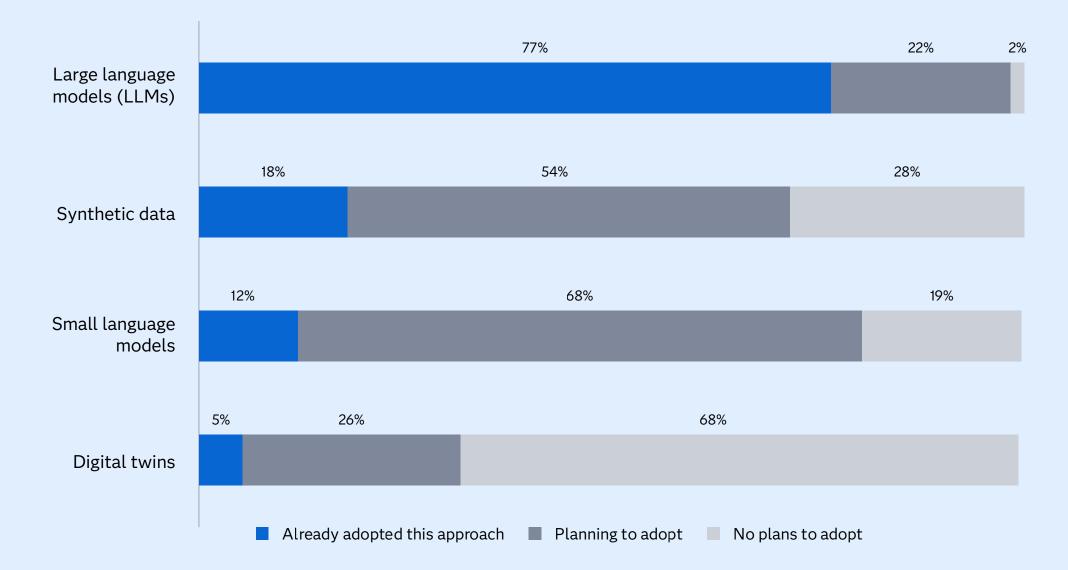
Twelve months ago, marketers were diving into the shallow end with GenAI. Today, our research shows that marketers have powered ahead with the adoption of GenAI technologies, primarily large language models (LLMs).

A very small percentage of marketing organizations in 2025 are using **synthetic data generation**, small language models or **digital twin technologies** – so all mentions of GenAI will be referring to large language models.

In 2025, the adoption of GenAI among marketers increased significantly, with **85**% using the technology and **15**% fully integrating it into daily workflows. More than **90**% of marketers are fully aware of GenAI's powerful potential – and **93**% of marketing teams are backing up that belief with dedicated GenAI budgets for 2025/26.

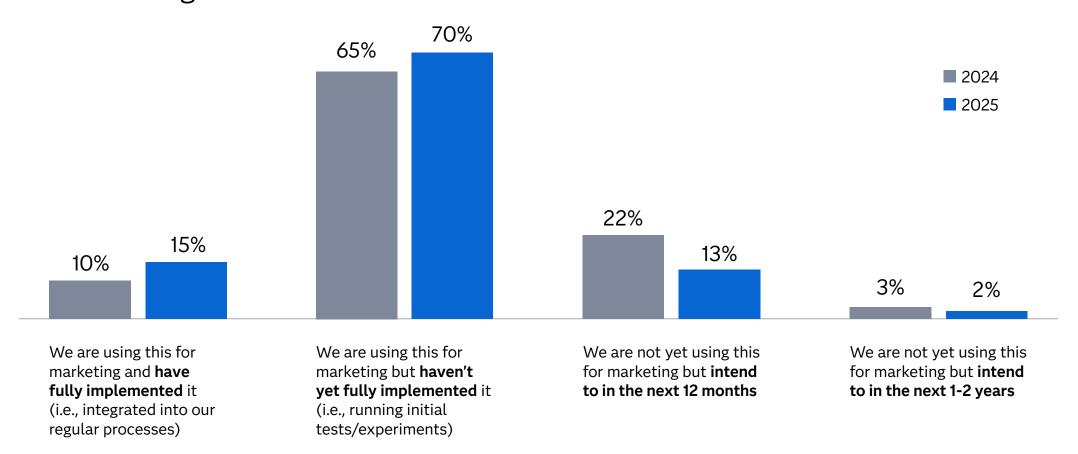
### 77% of marketers are using large language models

Which of the following types of generative AI are you currently using or planning to use in marketing?



#### In 2025, 85% of marketers are using GenAl

To what extent is your organization using generative Al for marketing activities?



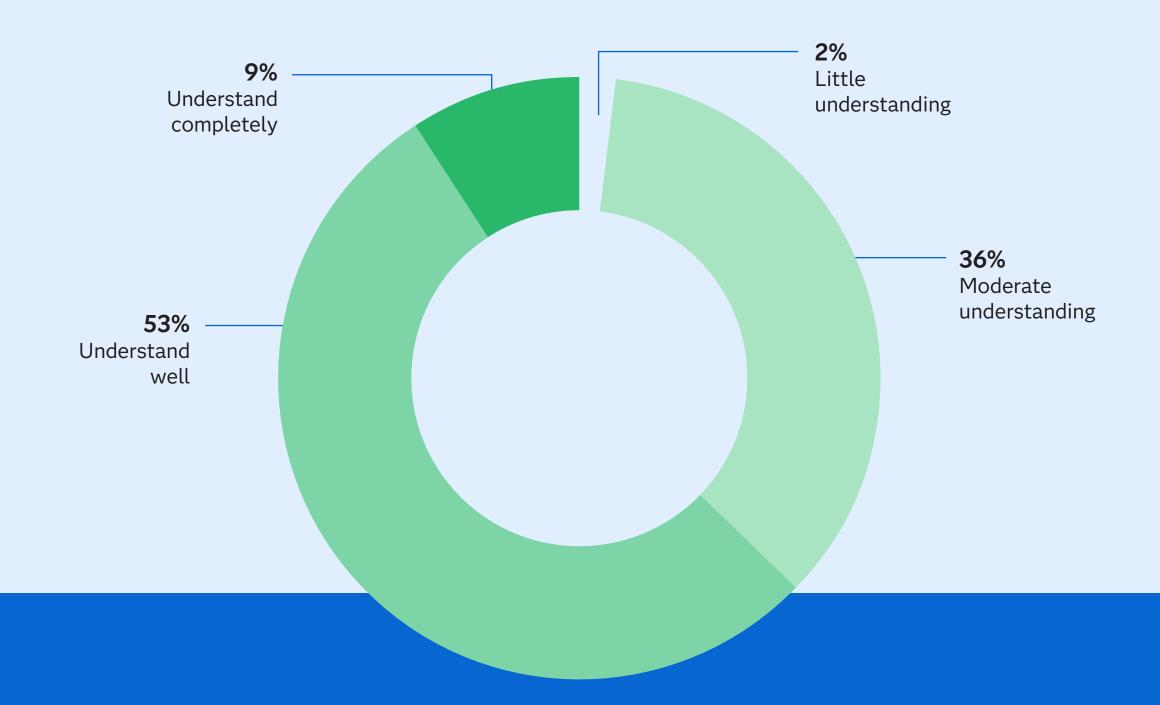
## 93% of marketers have a dedicated GenAl budget for 2025/2026

Does your organization have a dedicated budget for generative AI for marketing for the upcoming financial year?



## 9 out of 10 marketers understand the potential impact of GenAI on their business

How would you rate your personal understanding of generative Al and its potential impact on business processes?





### Marketers are reaping ROI rewards from GenAl

Eight in 10 marketers are seeing the fruits of their GenAI labor in terms of a return on investment. Not only are marketers saving time and money, they're also seeing increased customer loyalty and improved sales due to their GenAI tools.

93% of CMOs and 83% of marketing teams globally using GenAI tools are seeing a return on investment, with the highest ROI in the US (87%) and EMEA (85%), while APAC stands at 74%. And agentic AI Adopters are leading the way with 98% ROI.

The top three benefits marketers see when they use GenAI in their analytics processing include improved personalization (94%), efficient processing of large data sets (91%) and savings in operational costs and time (90%).



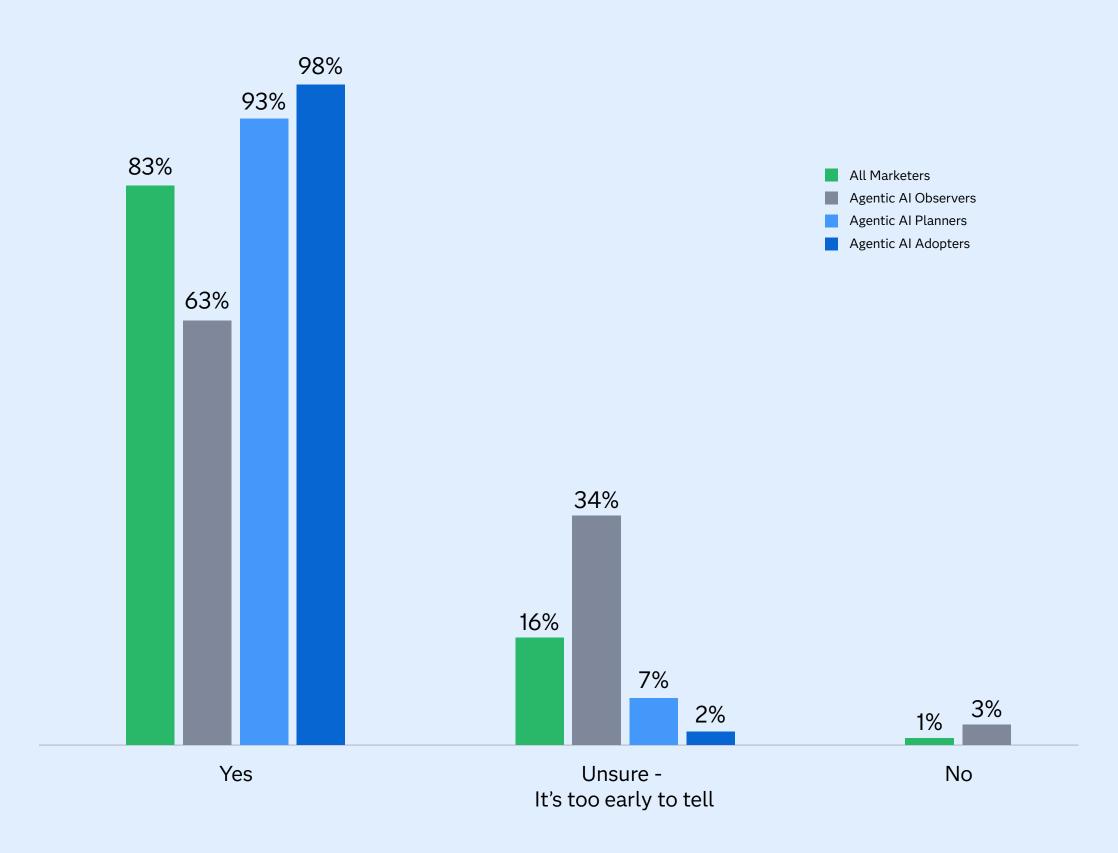
#### **SMB ROI insights**

55% customer loyalty

see savings in operational 58% costs and time

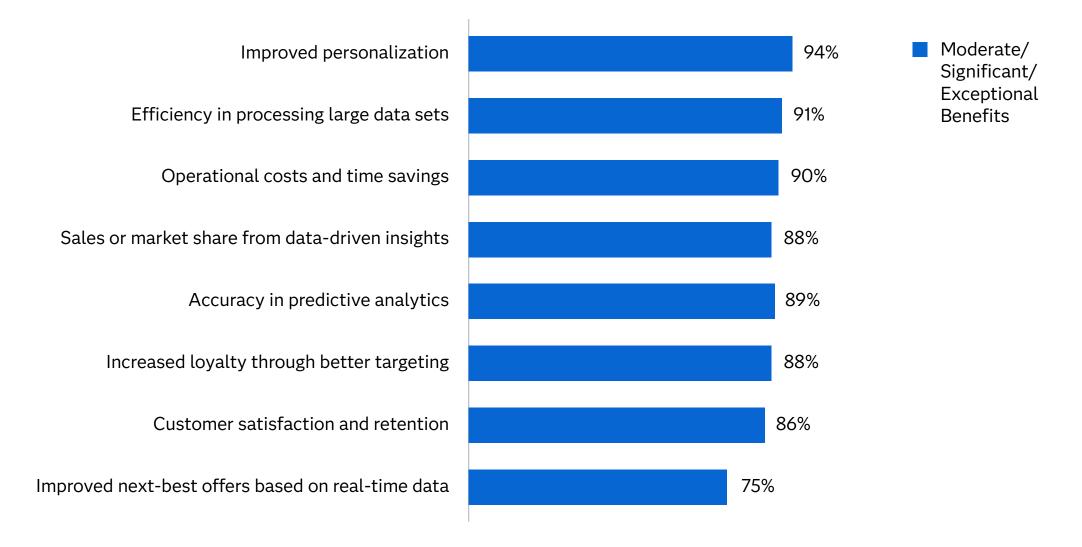
### 83% of all marketers and 98% of agentic Al Adopters see ROI from implementing GenAI

Are you seeing a return on investment (ROI) from implementing generative AI so far?



### 94% of marketers using GenAI for analytics improved personalization

What measurable outcomes are you realizing from the integration of generative AI into your analytics processes?



#### There's an evolution in core use cases

Core GenAI use cases are now common, with chatbots ranking as the most widely adopted, followed by content generation and trend analysis.

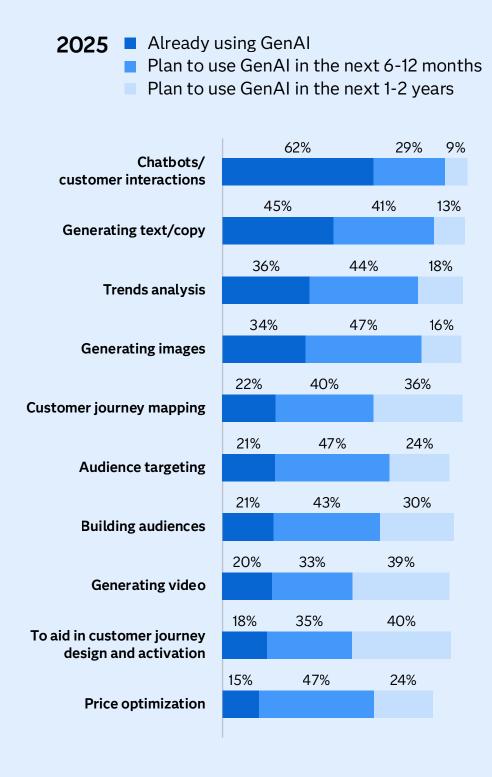
From a global perspective, the use of GenAI for chatbots is prevalent in the Americas (69%) compared to APAC (61%) and EMEA (58%). Text generation is more common in EMEA (48%) than APAC (44%) and the Americas (41%).

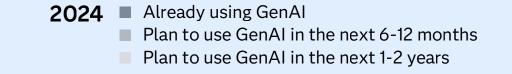
Adoption of GenAI has been faster than anticipated, and marketers continue to find new applications for GenAI technologies – with no end in sight. Marketers who are seeing ROI thanks to GenAI are moving quickly to build on that momentum by looking beyond it to autonomous AI technologies like agentic AI.

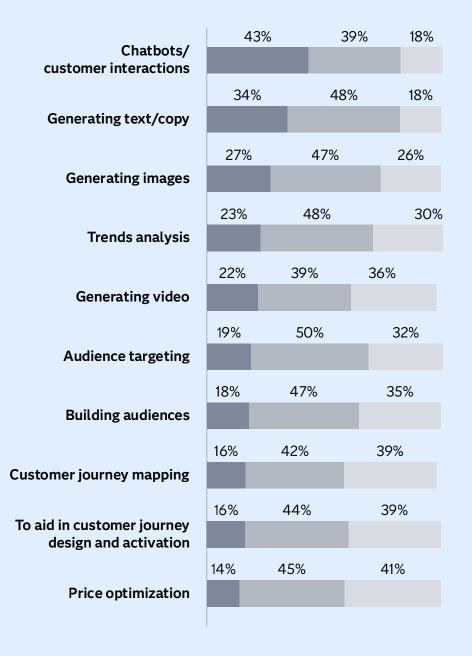


#### GenAl use cases continue to evolve

How are you using or planning to use generative AI in marketing?







### Testing the waters of agentic Al

GenAI enables marketers to fully exploit the power of their data. It can create content, answer complex queries and identify insights. However, it's just the shallow end of what's possible with AI – fundamentally a tool that reacts to human prompts to increase productivity for individual tasks or users.

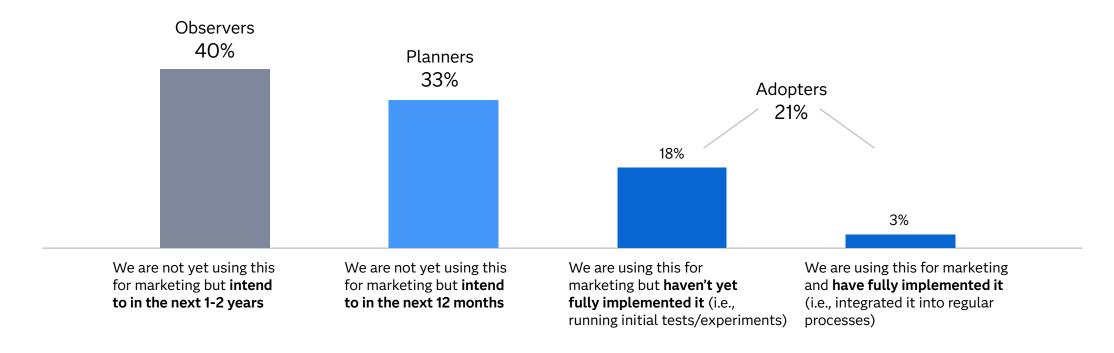
Our research shows that many organizations are now moving further on their AI journey. Using the same LLMs and data pipelines that power GenAI, they are beginning to experiment with a new, autonomous collaborator: agentic AI. This allows organizations to orchestrate complex workflows, processes and interactions with minimal human intervention.

21% of marketers are already testing agentic AI in live environments and 73% are planning to implement it within two years. The US is slightly ahead when it comes to agentic, where 28% of marketers have either tested or fully implemented it.

However, many organizations and CMOs are still experiencing agentic AI knowledge gaps as they struggle to understand and keep up with the emerging trends. Despite this, **51**% of marketing decision makers plan to invest in agentic AI next year.

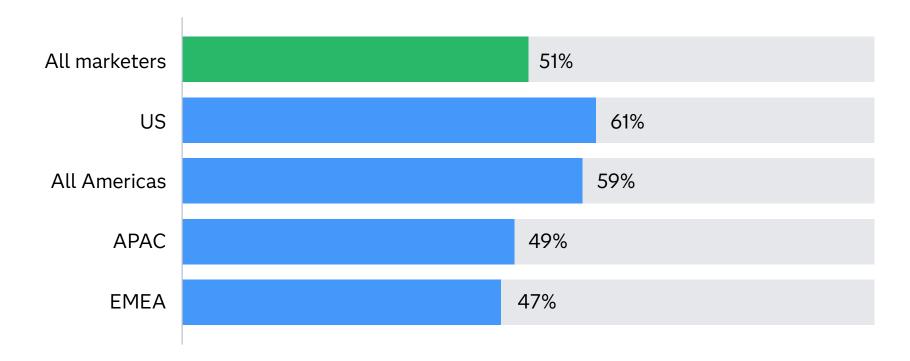
### Adopters take the lead on testing agentic Al

To what extent is your organization using agentic AI for marketing activities?



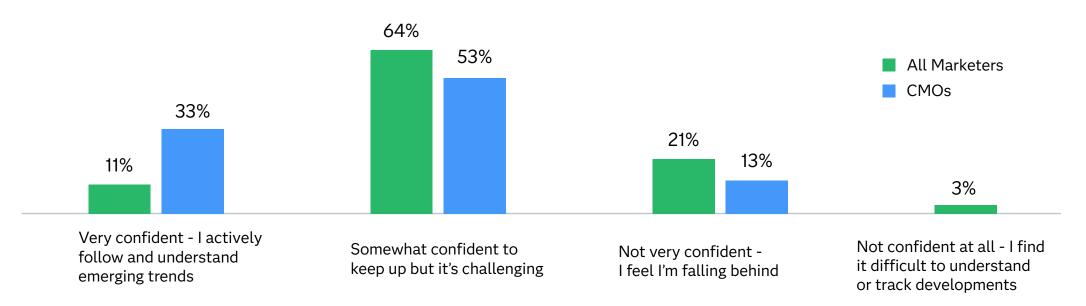
## Over half of marketers plan to invest in agentic in the next year

Is your organization planning to invest in agentic AI for marketing in the next financial year?



# Only 33% of CMOs are very confident in following and understanding emerging trends in agentic AI

How confident are you that you can stay up to date with the latest developments in agentic AI as they apply to marketing?



Percentages on charts may not add to 100% due to rounding

#### Adopters are leading the way in agentic Al

Our research shows that AI adoption in marketing follows a clear progression: GenAI, then agentic AI and ultimately quantum computing. When it comes to agentic AI, marketers fall into three groups: **40**% are Observers, **33**% are Planners and **21**% are Adopters. As mentioned earlier, Adopters are already using agentic AI, Planners intend to within the next year and Observers intend to within the next two years. Observers are behind the curve in both agentic AI and GenAI and are seeing fewer benefits from GenAI.

Adopters are forging ahead with both GenAI and agentic AI. By maximizing GenAI's full potential, this group has developed the data infrastructure, AI literacy, governance and risk management strategies needed to quickly adopt agentic AI. Adopters aren't just adding tools – they're progressively building capabilities too.

Adopters not only better understand GenAI than Planners and Observers, but they also see higher ROI. They're also more likely to use GenAI for audience targeting, customer journey design and price optimization.

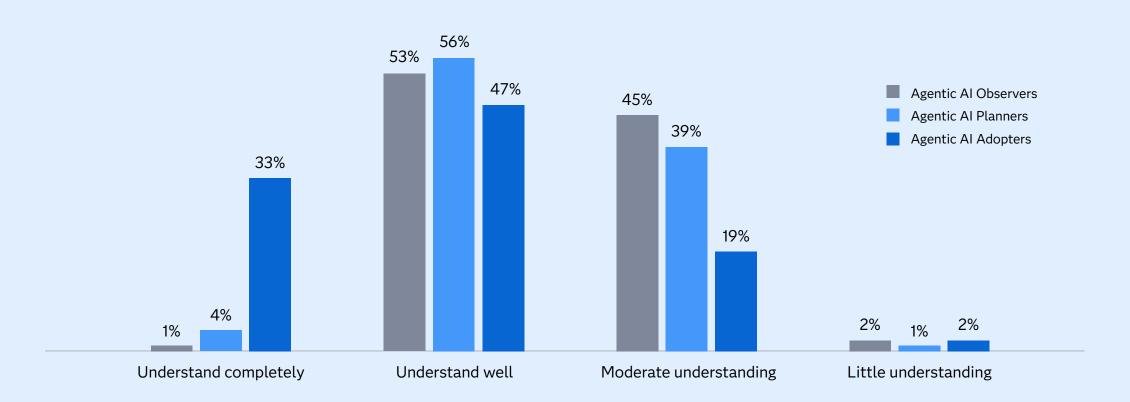
Adopters are ahead of Planners and Observers when it comes to using synthetic data, digital twins and small language models.



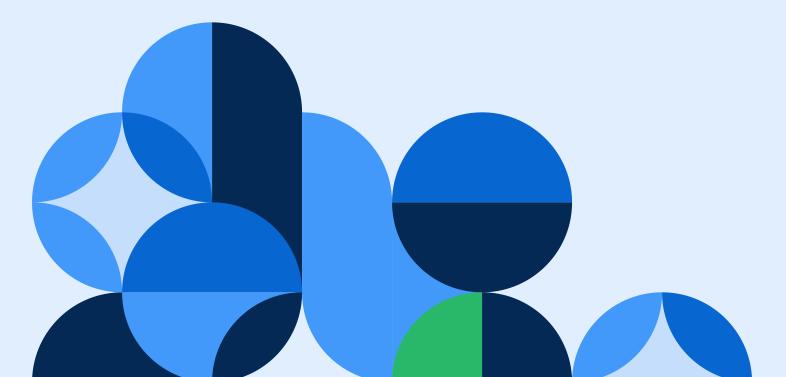
Adopters are **1.5 times more likely** than Observers **to see a return on investment from GenAl.** 

# 80% of Adopters have a good understanding of GenAI in comparison with 60% of Planners and 54% of Observers

How would you rate your personal understanding of generative AI and its potential impact on business processes?

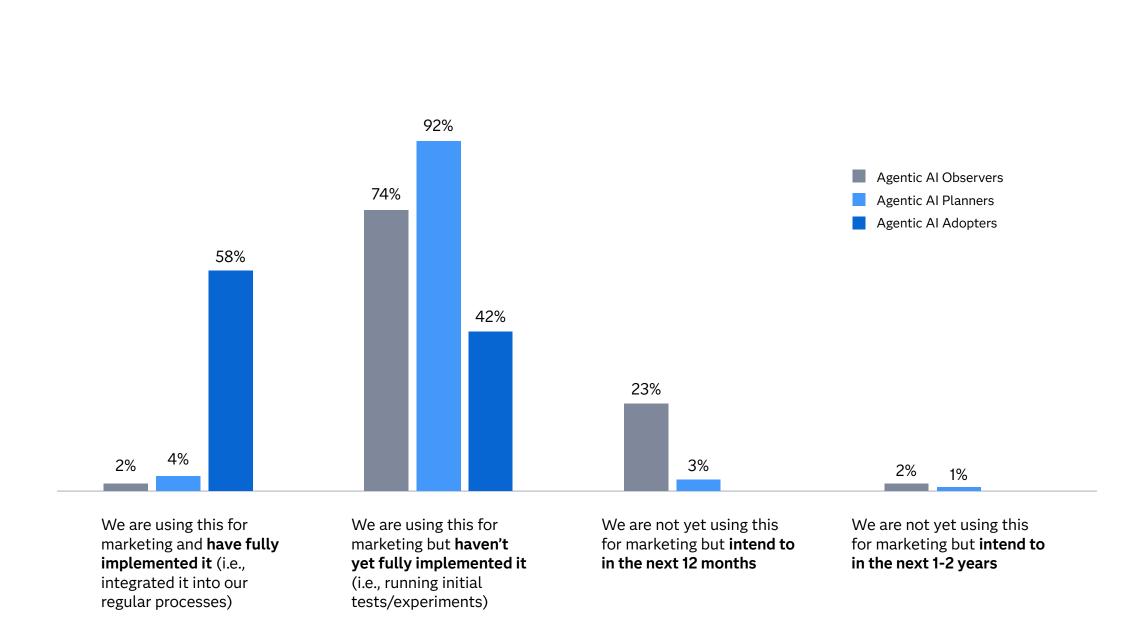


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## Adopters are ahead of Planners and Observers in GenAl maturity

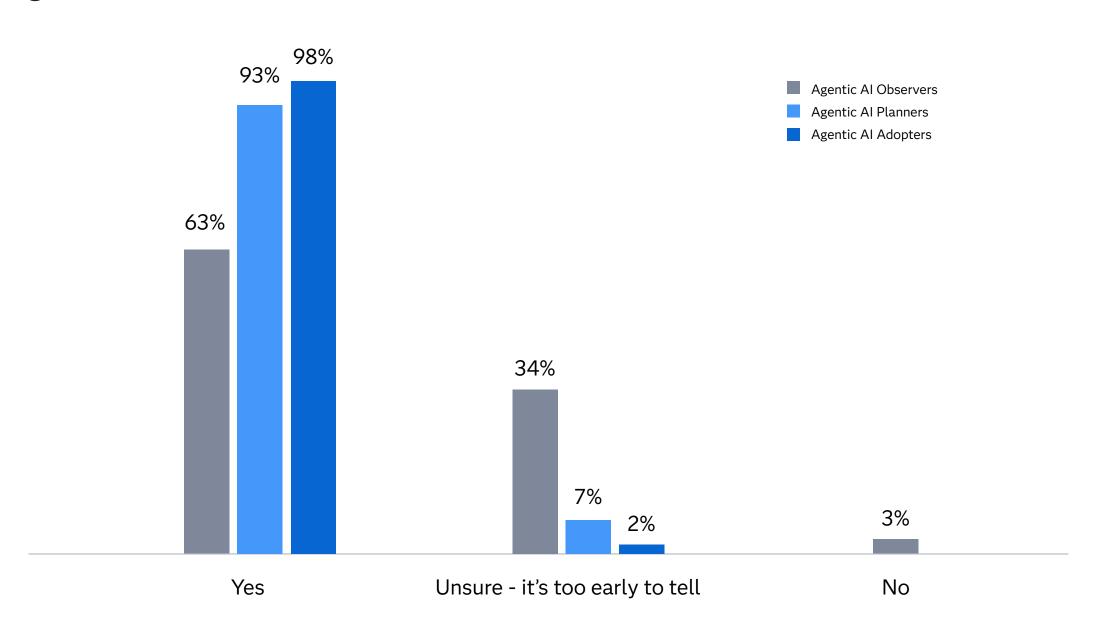
To what extent is your organization using generative Al for marketing activities?



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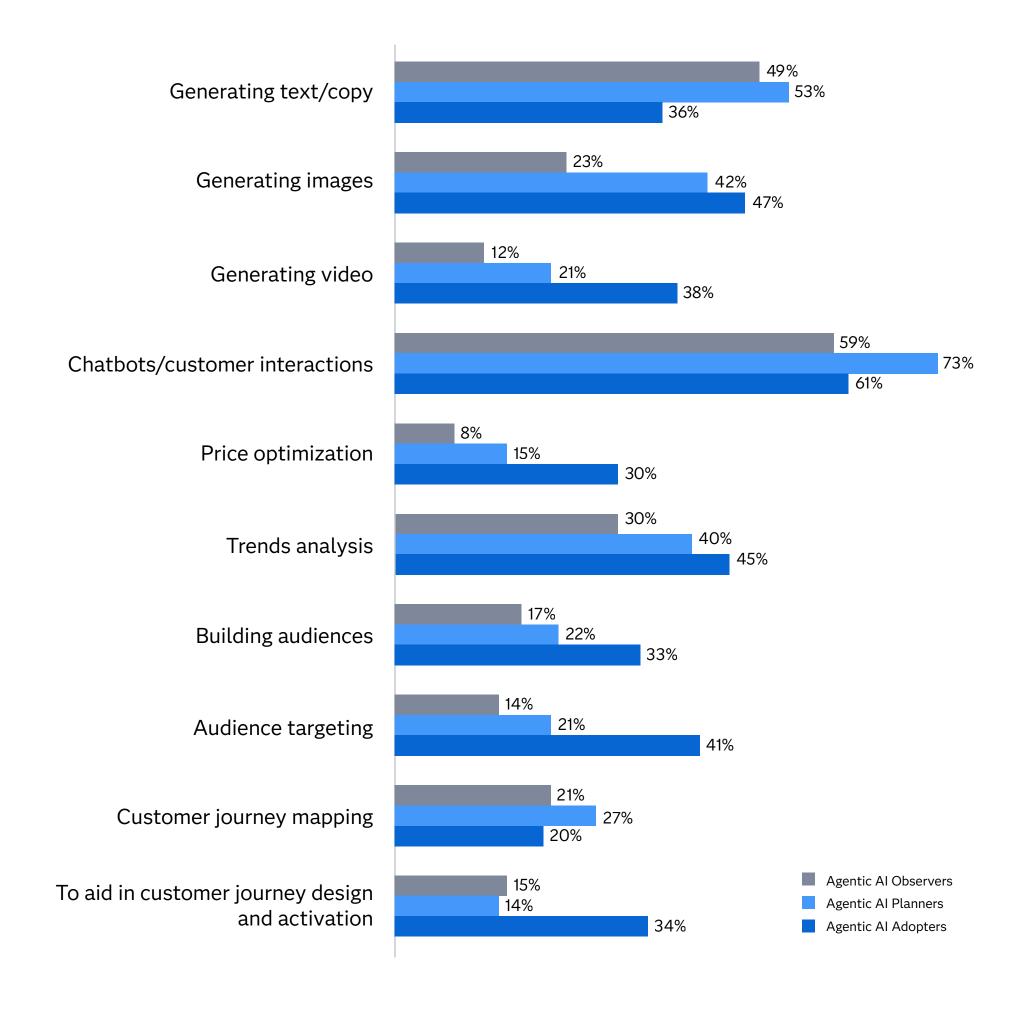
## 98% of Adopters are seeing ROI from adopting GenAl

Are you seeing a return on investment (ROI) from implementing generative AI so far?



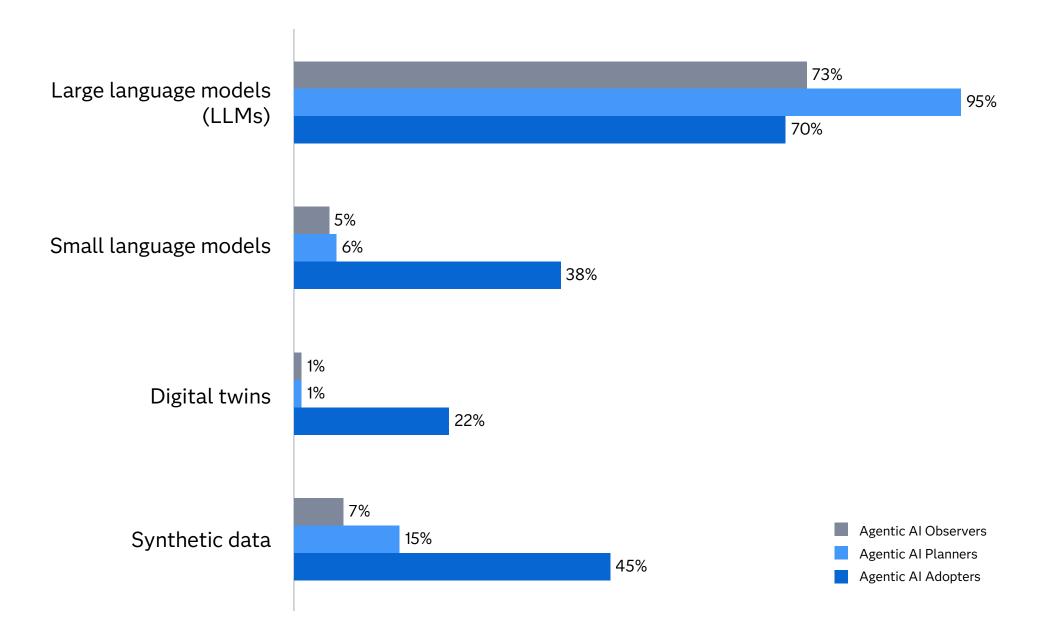
## Adopters are more likely to be using GenAl for activities like audience targeting

How are you using or planning to use generative AI in marketing?



# Adopters are more likely than other groups to have adopted synthetic data, small language models and digital twins

Which of the following types of generative AI are you currently using or planning to use in marketing?



## 4 steps to advance your agentic Al journey

As the adoption gap widens, other groups of marketers are struggling to keep up with Adopters. Planners and Observers are encountering challenges as they implement AI. Our research uncovers four key areas where their progress with agentic is stalling. We believe that by following the lead of Adopters, these groups can accelerate success along their AI journey.

- [1] Get AI infrastructure and knowledge in place forging a path from GenAI to agentic.
- [2] Deploy agentic AI strategically understanding its powerful use cases.
- [3] Go beyond governance embedding confidence and ethical awareness.
- [4] Ensure trust by keeping humans in the loop employing one key safeguard for agentic AI.



#### STEP 1:

## Get Al infrastructure and knowledge in place

Our research finds that many marketers don't have the AI infrastructure, knowledge and processes in place to adequately support their adoption of GenAI. This means that they lack the practical skills to progress to agentic.

Adopters have gained greater capability and confidence through AI experimentation. Observers and Planners should expand their organizational knowledge of GenAI to smooth the transition from GenAI to autonomous AI models.

While **75**% of Adopters believe they're using AI to its full potential – only **7**% of Observers are. **42**% of Adopters also take a more integrated approach to AI use across campaign channels to support real-time decision making – in contrast to **1**% of Observers.

Adopters also focus on testing, optimization and performance while Observers and Planners prioritize objectives and use cases when considering measurable outcomes.

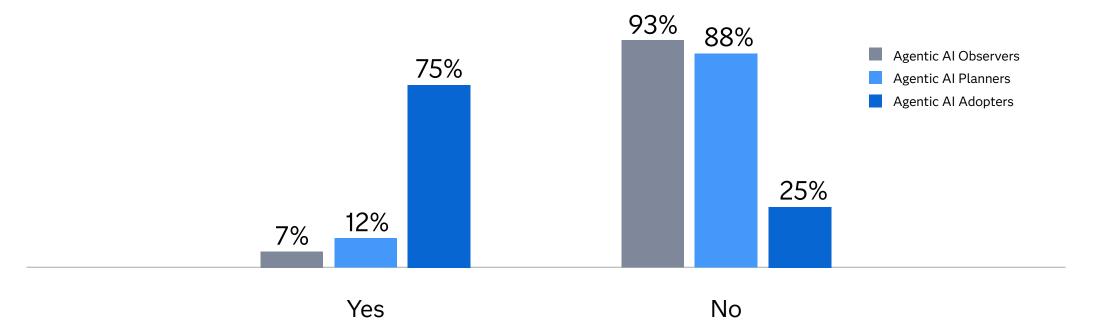


#### Key insight

Being an "AI-ready" organization means having three key elements: solid data and technical infrastructure, teams skilled in active and semi-autonomous AI use and processes ensuring trustworthy AI. Without all three working simultaneously, organizations struggle to move from experimental AI to production-ready, agentic AI deployment.

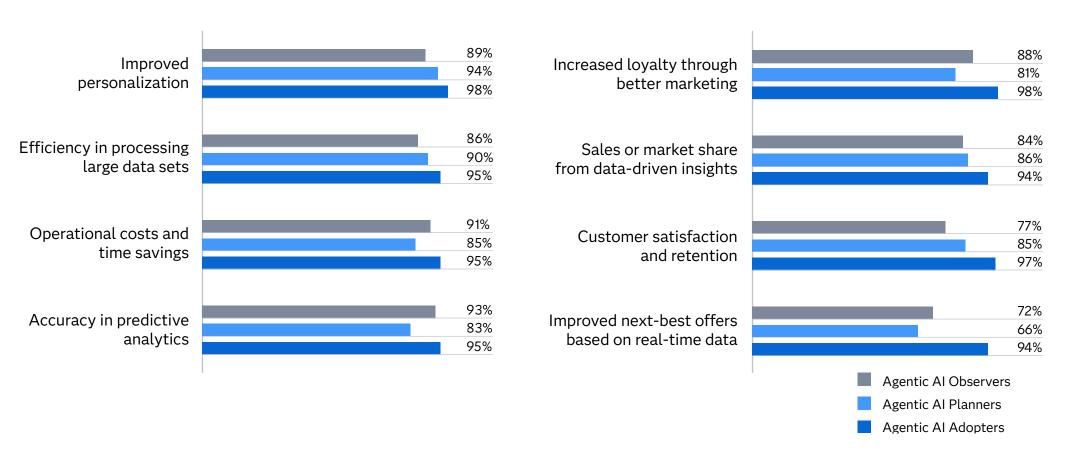
### 3 out of 4 Adopters feel they are using Al to its full potential

Do you feel your organization is using AI tools in marketing to their full potential?



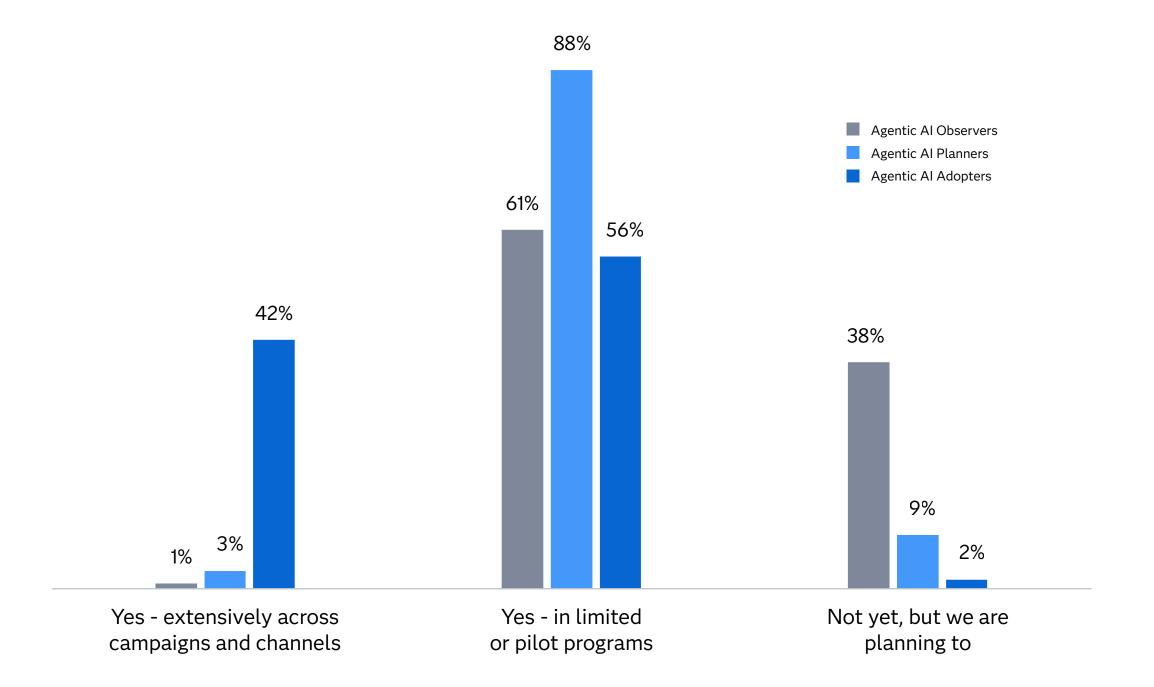
### Observers are less likely to see measurable outcomes from using GenAl

What measurable outcomes are you realizing from the integration of generative AI into your analytics processes?



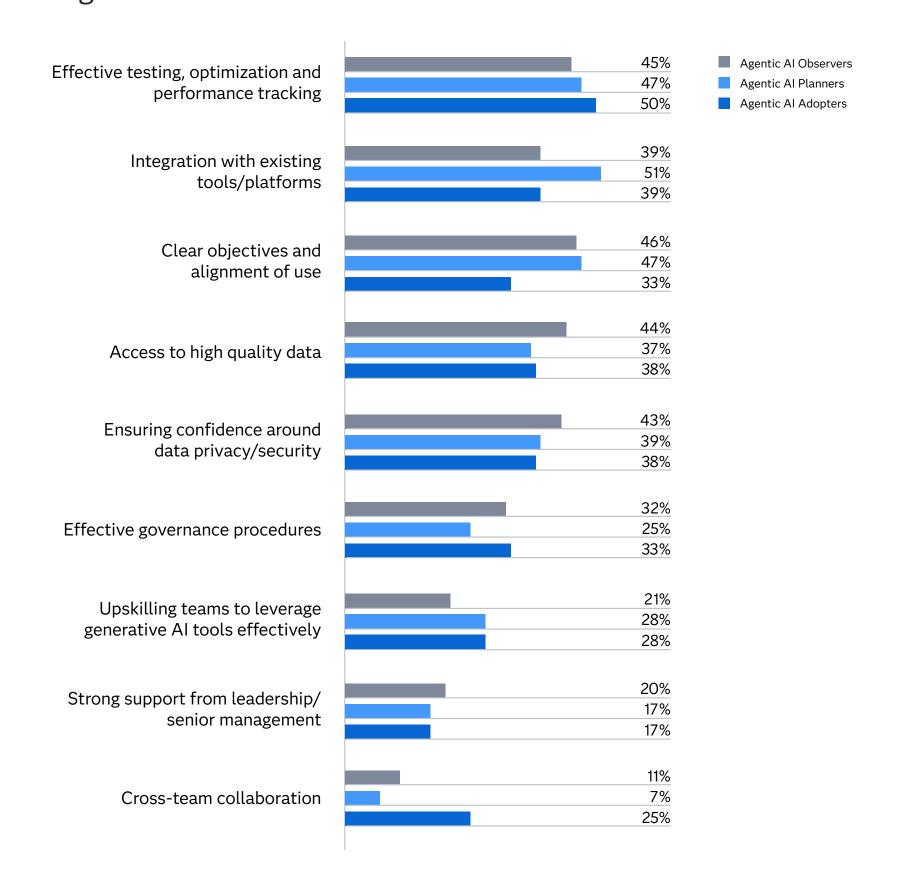
### 42% of Adopters are using AI to support real-time decision making

Is your marketing function currently using AI-driven decisioning (e.g., systems that automatically select the next-best action, offer or message based on customer data and behavior)?



# Adopters consider effective testing, optimization and performance tracking the most important factor in achieving measurable ROI from GenAI in marketing

Which of the following do you consider most important in achieving measurable outcomes/return on investment from the use of generative AI in marketing?



#### STEP 2:

### Deploy agentic AI strategically

Many marketers are not taking a strategic approach to AI. They are unaware of possible use cases or the potential impact agentic AI could have on their bottom line. Just **25**% of Observers are implementing an enterprisewide AI strategy, compared to **63**% of Adopters. Only **3**% of Observers report a strong understanding of agentic AI, while it's **61**% for Adopters.

Agentic AI can be used to autonomously identify emerging trends, test campaign variants and optimize customer journeys in real time. Within the next two years, Planners will focus on simpler functions of agentic, such as automated journey design (60%) and performance reporting (49%). Observers anticipate using agentic AI conversational agents (57%), perhaps because chatbots have been such a popular use case for GenAI.

Adopters are more keenly aware of agentic AI's potential business impact. This awareness allows them to be strategic when deploying advanced use cases, such as continuous learning agents and performance reporting.

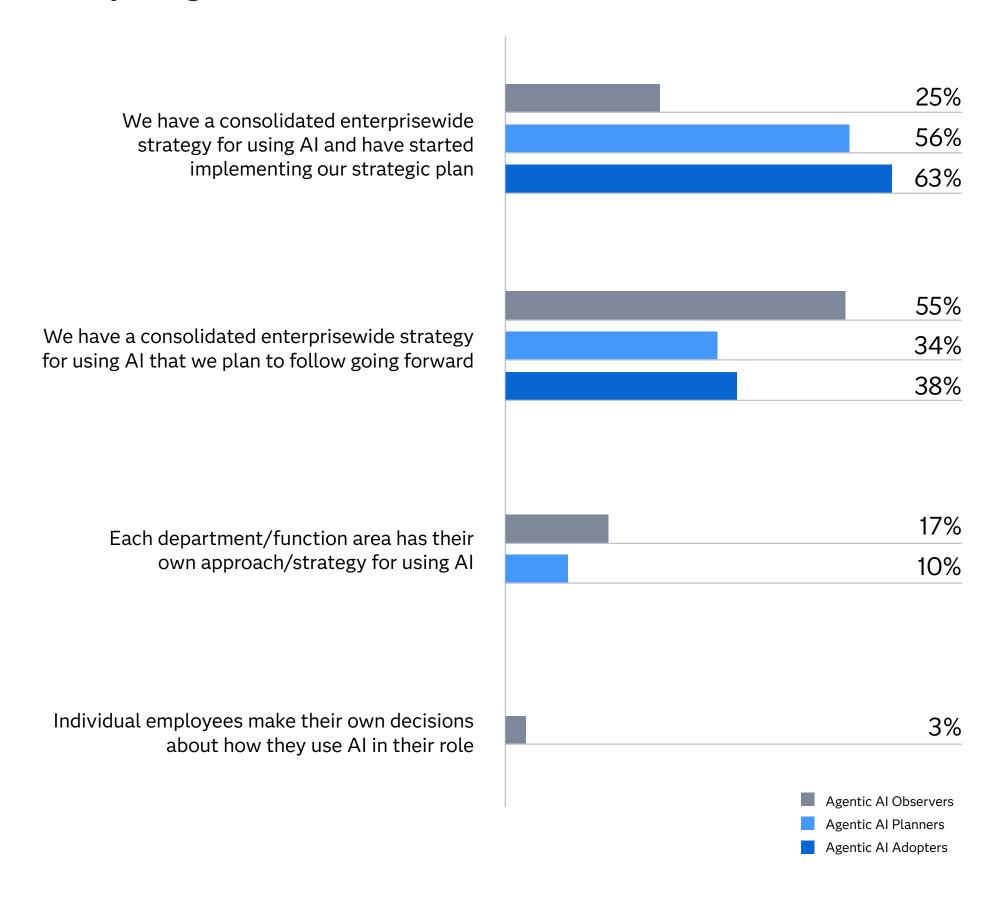


#### **Key insight**

Advanced marketing organizations understand which types of agents can be deployed for customer engagement and which agentic AI use cases deliver the quickest wins with the strongest ROI. Tackling these use cases first builds confidence, strengthens processes and helps teams become comfortable using AI in a trusted manner across marketing, service and support channels.

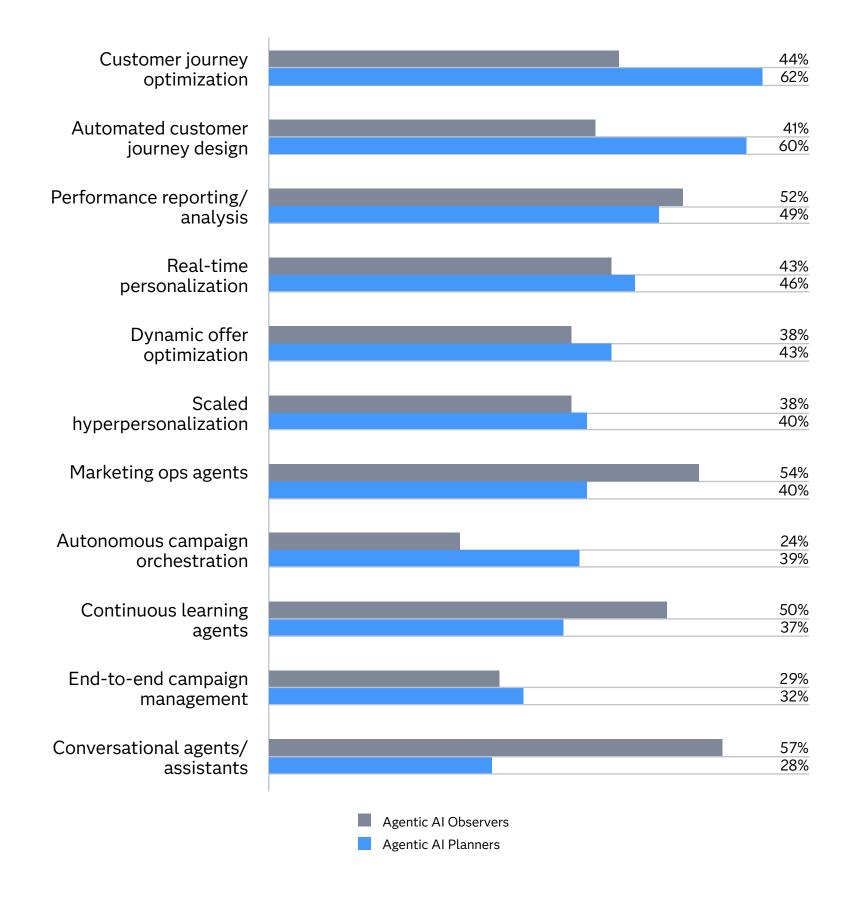
## Just 25% of Observers are implementing an enterprisewide AI strategy

Which of the following best describes the way your organization is currently using AI?



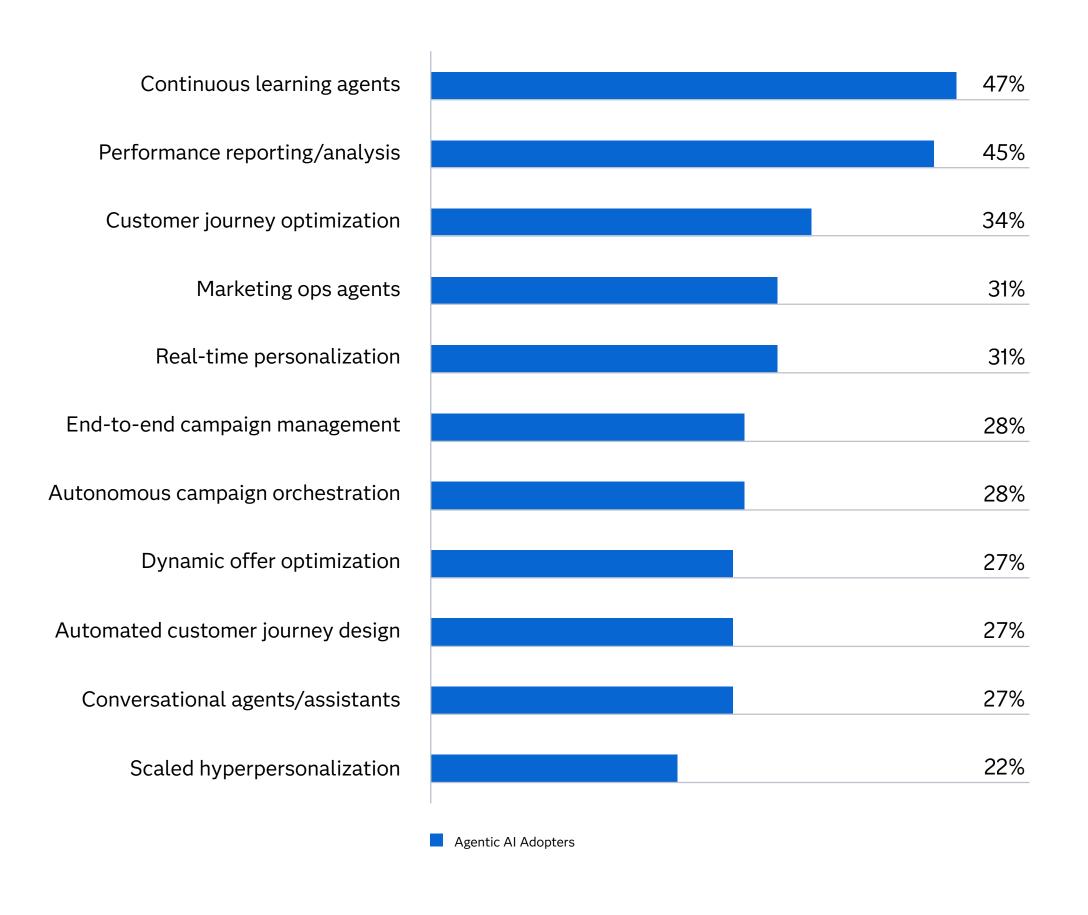
# In the next two years, Planners intend to adopt automated journey design and Observers intend to adopt conversational agents

How are you using or planning to use agentic AI in marketing?



# For Adopters, the top current use cases for agentic AI are continuous learning agents and performance reporting

How are you using or planning to use agentic AI in marketing?





#### STEP 3:

### Go beyond governance

Al governance has been a recurrent issue for marketers. In 2024, we found that fewer than one in 10 organizations had a well-established and comprehensive Al governance framework (7%), while half of marketers (48%) stated that their main concern about GenAl usage in their organization was governance.

This year shows that some progress has been made, but very few marketers feel strongly confident in their organization's AI governance. However, looking at the behaviors of Adopters, it's clear that their priorities have evolved beyond top-down governance to a more empowered and nuanced approach to the concerns presented by AI. Based on the behaviors of Adopters, marketers should go beyond governance to consider issues such as internal trust in AI usage and AI's ethical implications.

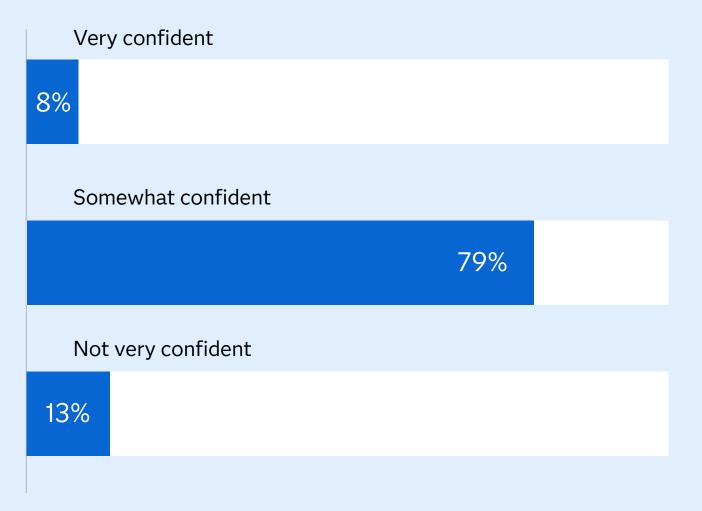
While **79**% of marketers feel somewhat confident in their organization's marketing AI governance, less than **10**% are strongly confident. A significant gap exists between Observers and Adopters, with **73**% having no agentic AI governance in place while **52**% of Adopters are developing that framework.

And as marketers progress on their AI journey, their priorities evolve. While Observers and Planners prioritize governance and data privacy, Adopters also prioritize internal trust and ethical implications for AI.

US marketers are more likely to have robust AI governance – **15**% compared to **11**% in the Americas, **10**% in APAC and **5**% in EMEA.

## Only 8% of marketers are very confident in their organization's Al governance

How confident are you that your organization has the right governance in place to ensure AI is being used responsibly in marketing?



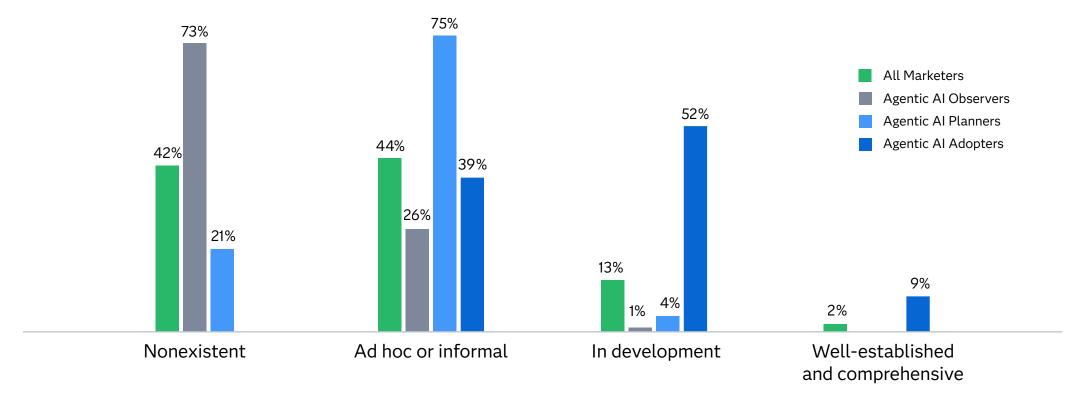


#### **Key insight**

Al governance is essential for organizations today, yet the majority still struggle to implement it effectively. This is due to the many components involved – from data privacy and protection to security, testing, ethical guidelines and adaptive learning. Without strong governance, trust in Al outputs and data erodes, causing 95% of GenAl initiatives to never reach production.

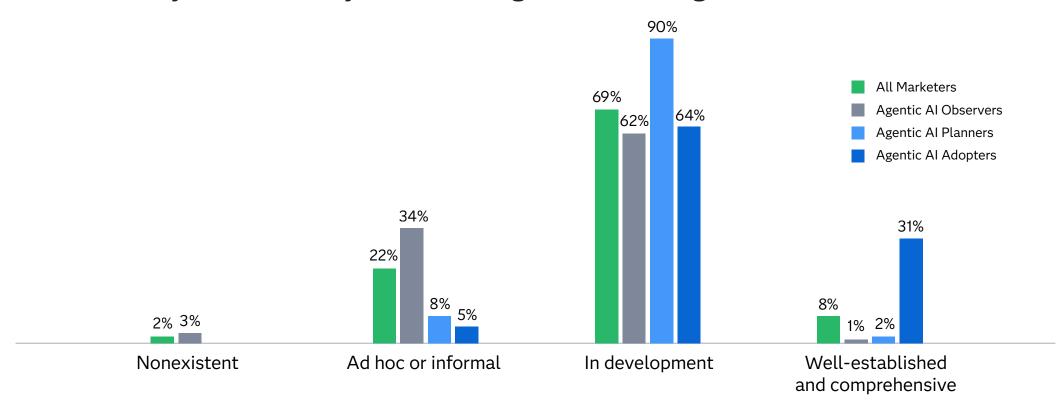
## 73% of Observers have no agentic Al governance in place

How would you describe your current agentic AI governance framework?



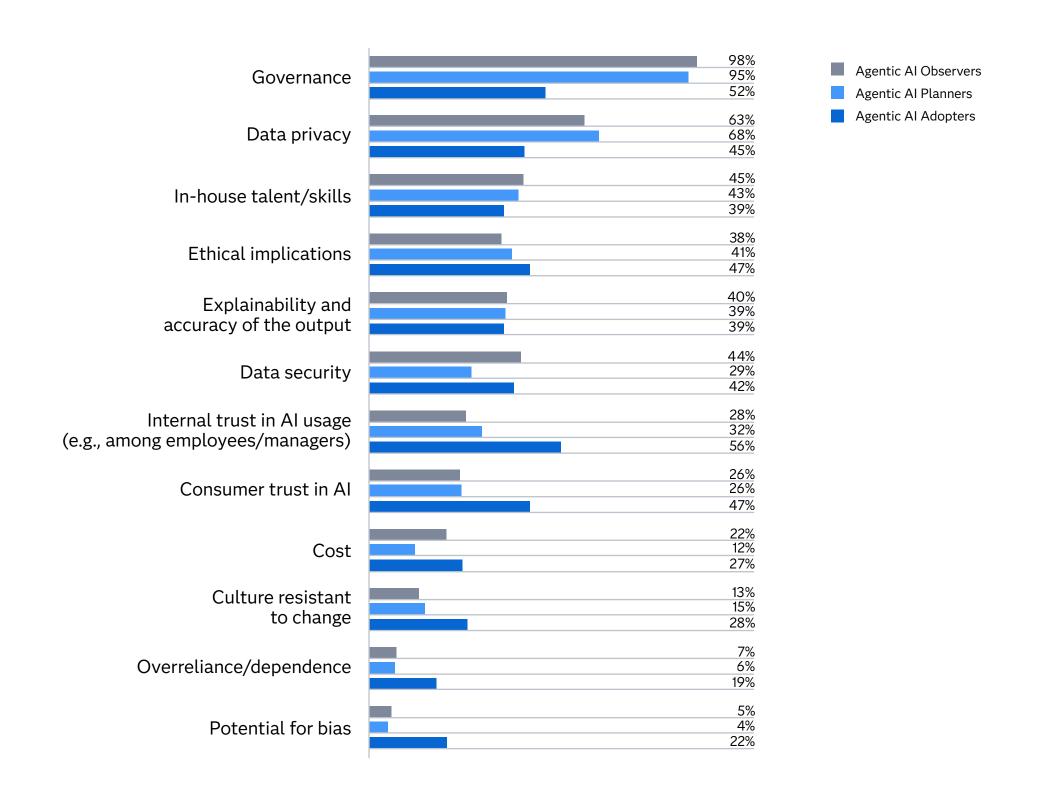
# Only 8% of all marketers describe their GenAl governance framework as 'well-established and comprehensive'

How would you describe your current generative AI governance framework?



# Adopters are more concerned than other groups about internal trust in AI usage and AI's ethical implications

What are your concerns regarding the usage of agentic Al in your organization?



Percentages on charts may not add to 100% due to rounding

#### STEP 4:

## Ensure trust by keeping humans in the loop

It's clear that marketers have spotted one possible safeguard for the risks inherent in AI deployment. Observers, Planners and Adopters agree that trust in agentic AI depends on meaningful human oversight. Collaborative approaches that keep humans in the loop (HITL) are the key to successful projects.

While a significant majority of marketers (90%) trust agentic AI to some extent, it's conditional on human oversight, with only 5% expressing full trust. Nearly half of marketers (48%) believe humans should approve AI-generated decisions.

Adopters (36%) are more likely to say that human override features increase their trust in AI tools.



#### **Key insight**

Many marketers agree AI isn't ready for unrestricted use. Conditional trust with a human in the loop is essential. Explainability, transparency, approvals, confidence scores and testing help ensure AI follows human direction. Lower-risk cases, such as product recommendations, allow more automation. High-risk cases, like medical or judicial decisions, require strong human oversight.



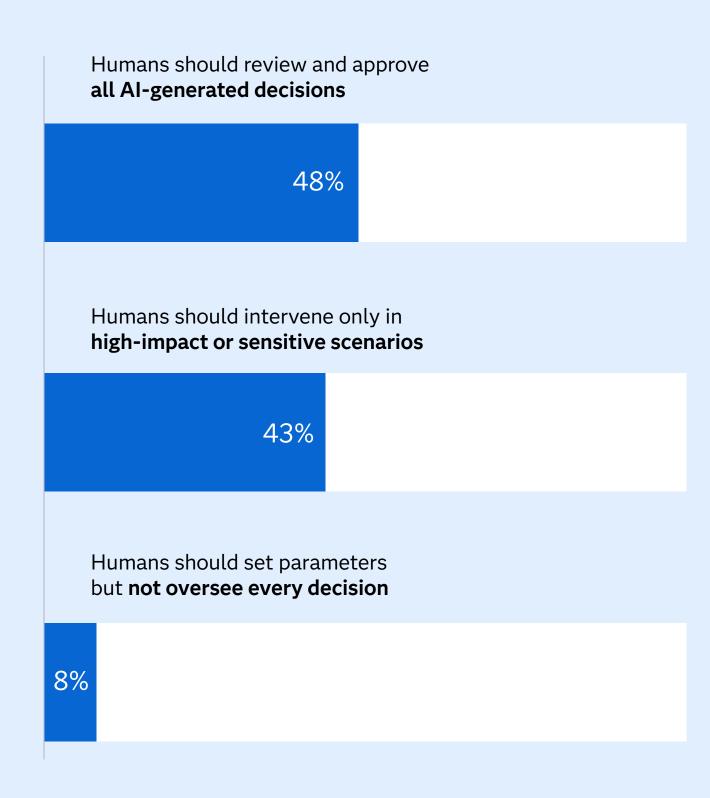
## Only 1 in 20 marketers fully trust agentic Al operating without human oversight

Do you trust agentic or autonomous AI systems to make marketing decisions without direct human involvement?



## Nearly half of marketers say humans should approve all AI-generated decisions

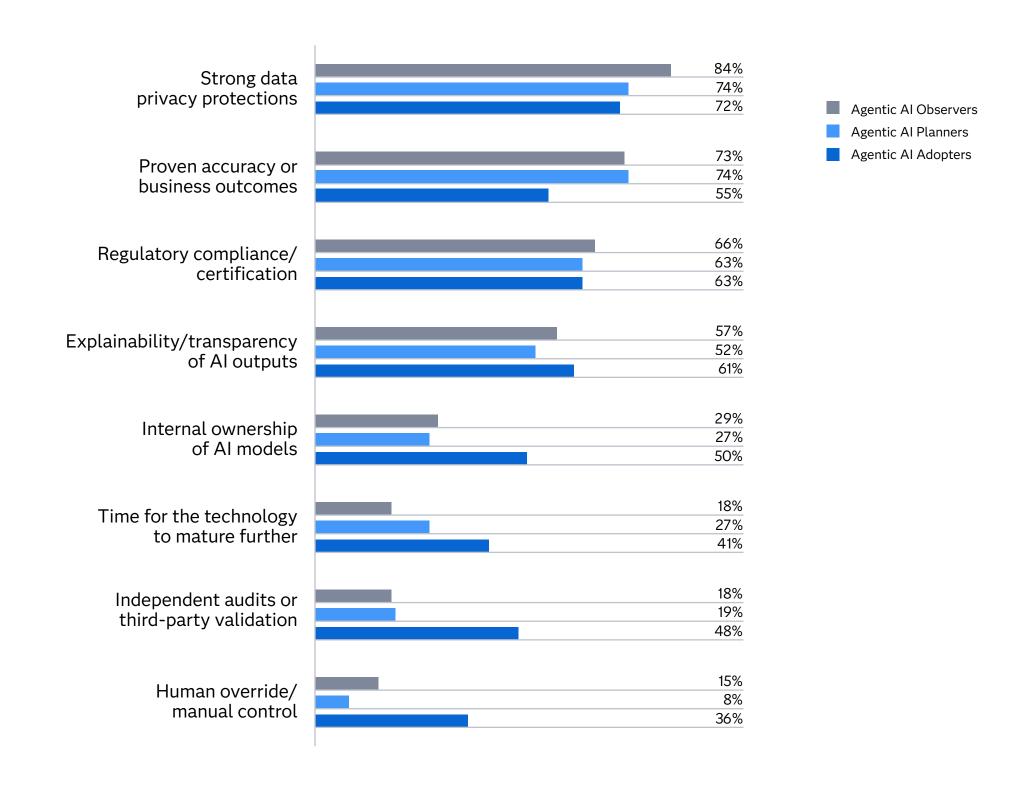
What role do you believe human oversight should play in AI-driven marketing decisions?

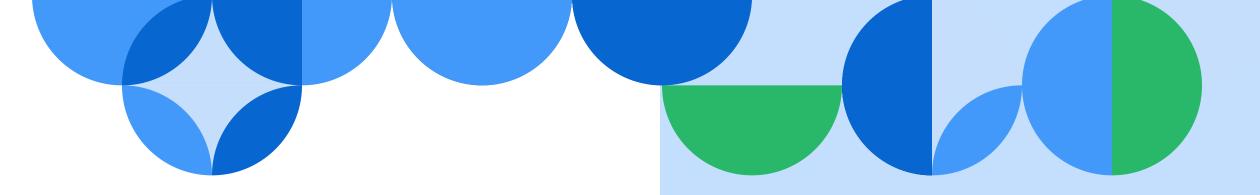


1% of respondents were unsure or felt AI should operate with minimal or no human involvement.

# Adopters are more likely than other groups to say that human override features would increase their trust in AI tools

What are the key factors that would increase your trust in AI tools?





### The next wave: Quantum computing

As marketers progress from using GenAI to agentic AI to quantum computing, the rate and scale of change grows exponentially. Our research in 2024 and 2025 shows that marketers made huge progress with GenAI in just 12 months. A year from now, we expect to see widespread adoption of agentic AI, as **51%** plan to invest in the technology. At this point, quantum computing will be within grasp – are you ready for the next wave?

Since marketers' use of GenAI and agentic is the foundation for their readiness for quantum computing, it's even more important to deploy the strategies laid out in this report to make headway with the technology. At the moment, it's clear that marketers are beginning to consider the possibilities of quantum.

There's growing interest in quantum computing as **31**% of Adopters expect quantum computing to have marketing applications within two years. While just **16**% of marketers say they understand quantum computing well, this jumps to **49**% among Adopters.

As organizations progress on their AI journey, they become more attuned to adjacent, future-facing technologies like quantum. As further proof, **50**% of Adopters have already incorporated quantum computing into digital or innovation road maps.

Marketers anticipate that the benefits of quantum computing may include advanced predictive analytics, faster and more secure data processing and real-time customer journey simulation. This next wave of AI technology will enable businesses to deliver highly personalized marketing strategies by analyzing vast data sets with unprecedented speed and accuracy, leading to more effective customer targeting and engagement. For customers, this means more relevant experiences and offers.



#### **Quantum potential across sectors**

In banking, **80**% highlight advanced predictive analysis as a key benefit. For insurance, **69**% point to real-time customer journey simulation. In life sciences, **67**% emphasize hyperpersonalization at scale. Meanwhile, **62**% in health care focus on faster and more secure data processing. Those in the public sector are more likely than average to see benefits around synthetic data generation (**29**%) and dynamic pricing (**27**%).

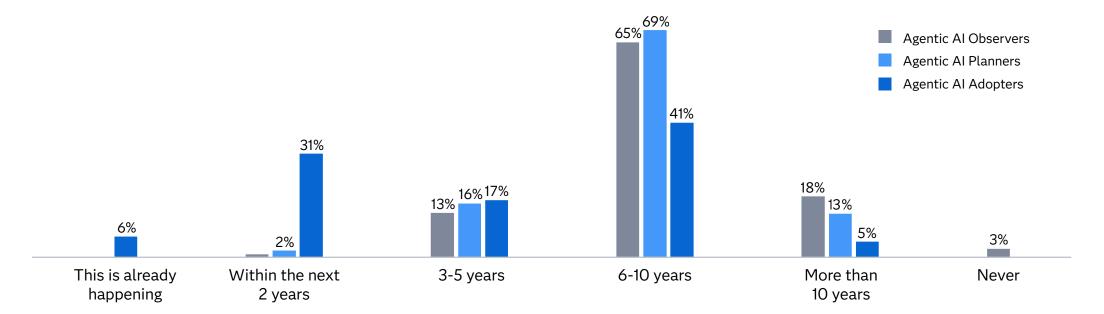


#### SMBs also see value in quantum

**20**% of SMBs are likely to see benefits in synthetic data generation – compared with **11**% in enterprises.

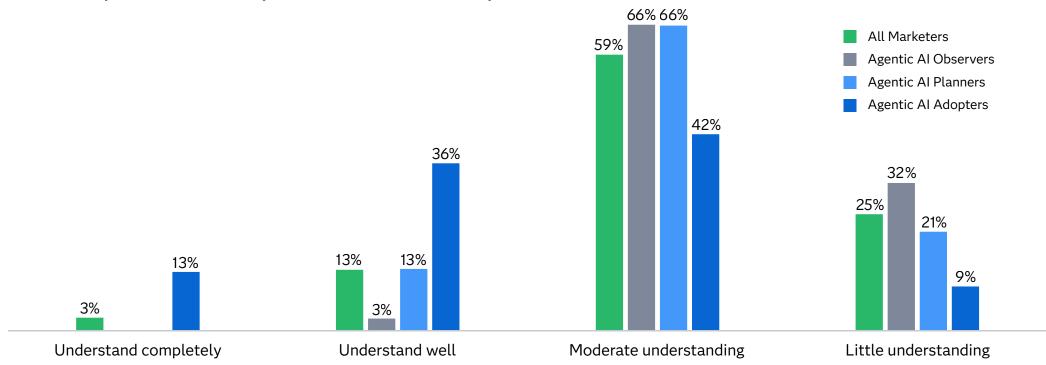
## 31% of Adopters expect quantum computing to have applications in marketing within two years

When do you expect quantum computing to start having applications in marketing in your organization?



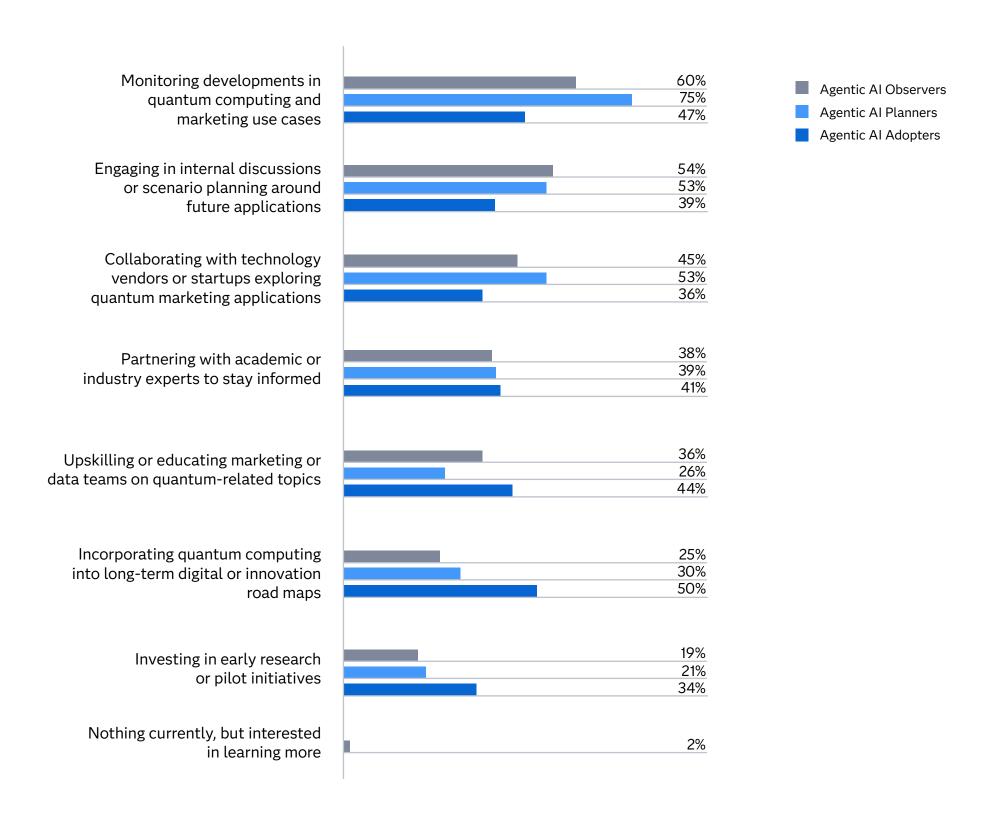
# 16% of marketers and 49% of Adopters say they understand quantum computing well or completely

How would you rate your personal understanding of quantum computing and its potential impact on business processes?



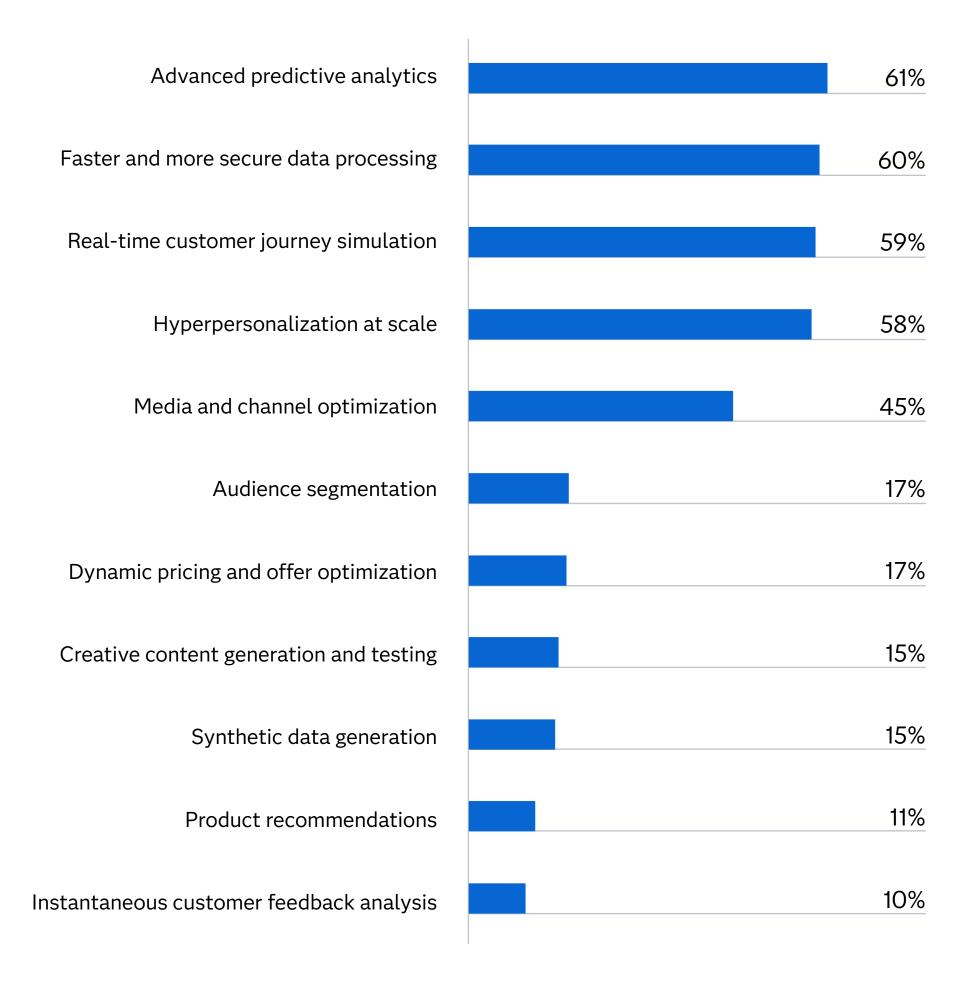
# Half of Adopters have already incorporated quantum computing into their digital or innovation road maps

What, if anything, are you doing to prepare for possible applications of quantum computing in marketing in your organization?



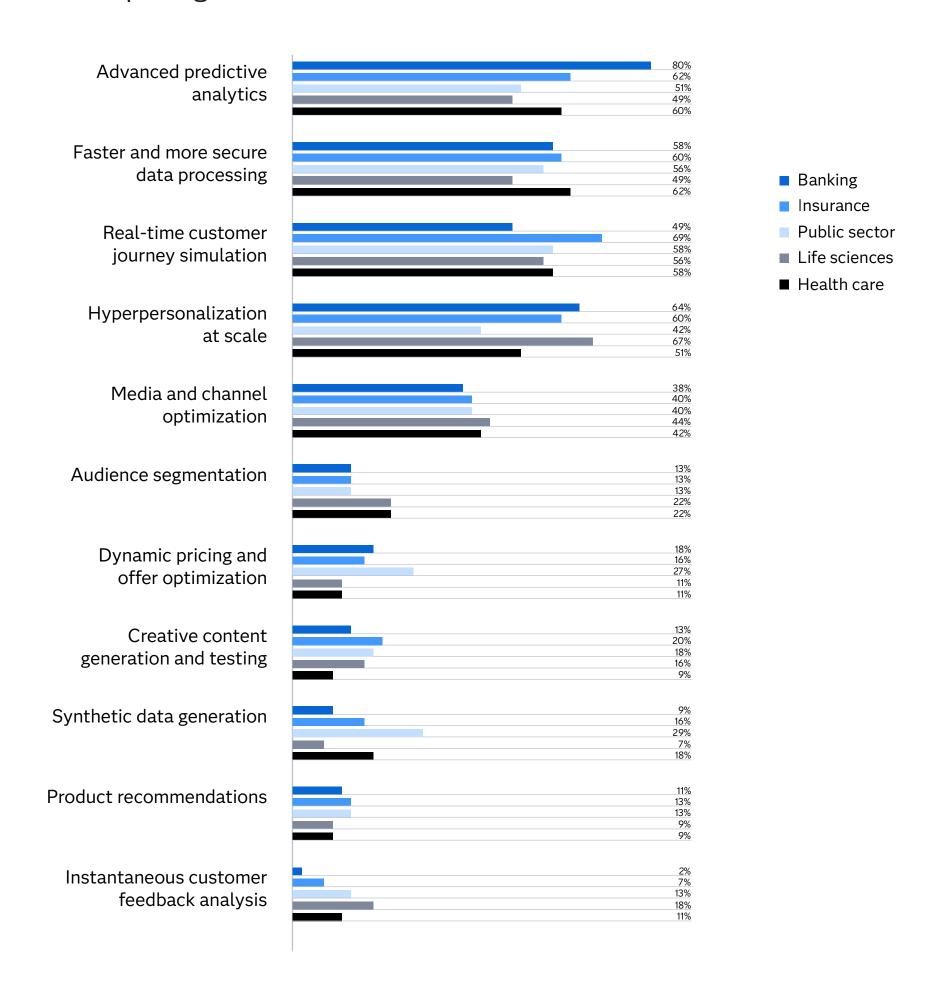
## Marketers recognize a range of different applications for quantum computing

What areas of marketing do you believe could benefit from quantum computing?



## Different sectors see different applications for quantum computing

What areas of marketing do you believe could benefit from quantum computing?



## Mastering the age of agentic Al

Marketers must develop strategies to shift from GenAl's passive, reactive nature to agentic Al's active, autonomous nature to lay the foundations of customer engagement. As agentic Al becomes pervasive over the next several years, the need for quantum technologies will only increase.

#### Progressing from passive to pervasive Al

Since we launched phase one of this report series in 2024, the world of AI has advanced rapidly. GenAI technologies (particularly LLMs) are now embedded in many customer engagement solutions. Marketers are now exploring newer generative AI technologies, including synthetically generating data sources plus customer profiles and environments. So how do we position ourselves as the age of agentic AI rolls in? With a phased approach to AI.

#### Phase 1: A sound AI foundation

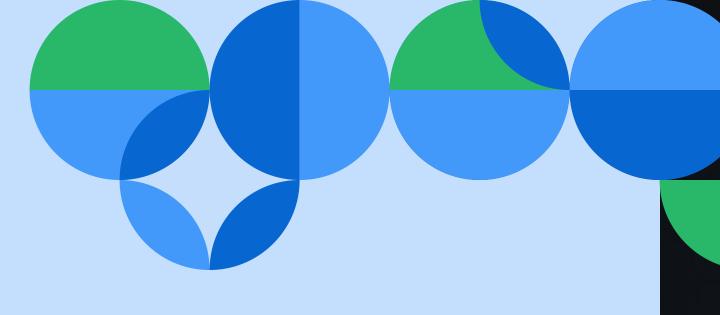
With **85**% of marketers using GenAI, **90**% understanding its impacts and **93**% of all marketers having a dedicated GenAI budget, it's clear that the LLM aspect of AI is well understood. But it's only the beginning. GenAI can be used in so many other ways beyond creating content and copy, including synthetic data generation, virtual environment creation and autonomous research, development and design. Can organizations pivot from early LLM wins to using GenAI technology as a springboard into more advanced **AI use cases** that create lasting competitive advantage?

#### Phase 2: The natural AI progression

It's no secret that AI has been around for a while, primarily used for internal processes. However, it's moved from the back office (scheduling, planning and insight) to the front office (customer engagement for sales, service and support). So its natural progression is in agentic form – as an active, semiautonomous assistant for marketers. And that's exactly how SAS is embedding agentic into our customer engagement platform, SAS® Customer Intelligence 360. Agents perform internal tasks in the software – such as audience selection, customer journey creation, content and model creation and decision determination. Marketers are empowered to be more efficient, while external agents can deliver information in a contextually relevant and timely manner.

#### Phase 3: Beyond agentic Al

With 21% of marketers already testing agentic AI and 73% planning to deploy in the next two years, agentic AI is well on its way. Within 3-5 years, organizations will likely have hundreds or thousands of semiautonomous agents executing tasks across all departments. However, deploying agentic AI at scale has a downstream effect. Organizations will need to maintain infrastructure that incorporates the principles of quantum computing. Because quantum computing handles information differently than conventional computers, it enables faster calculations and can generate multiple solutions at once. This approach is necessary for customer engagement use cases undertaken by agents, including multithreaded audience segmentation, behavioral prediction, scenario optimization, product recommendation and AI-driven customer engagement decisions.

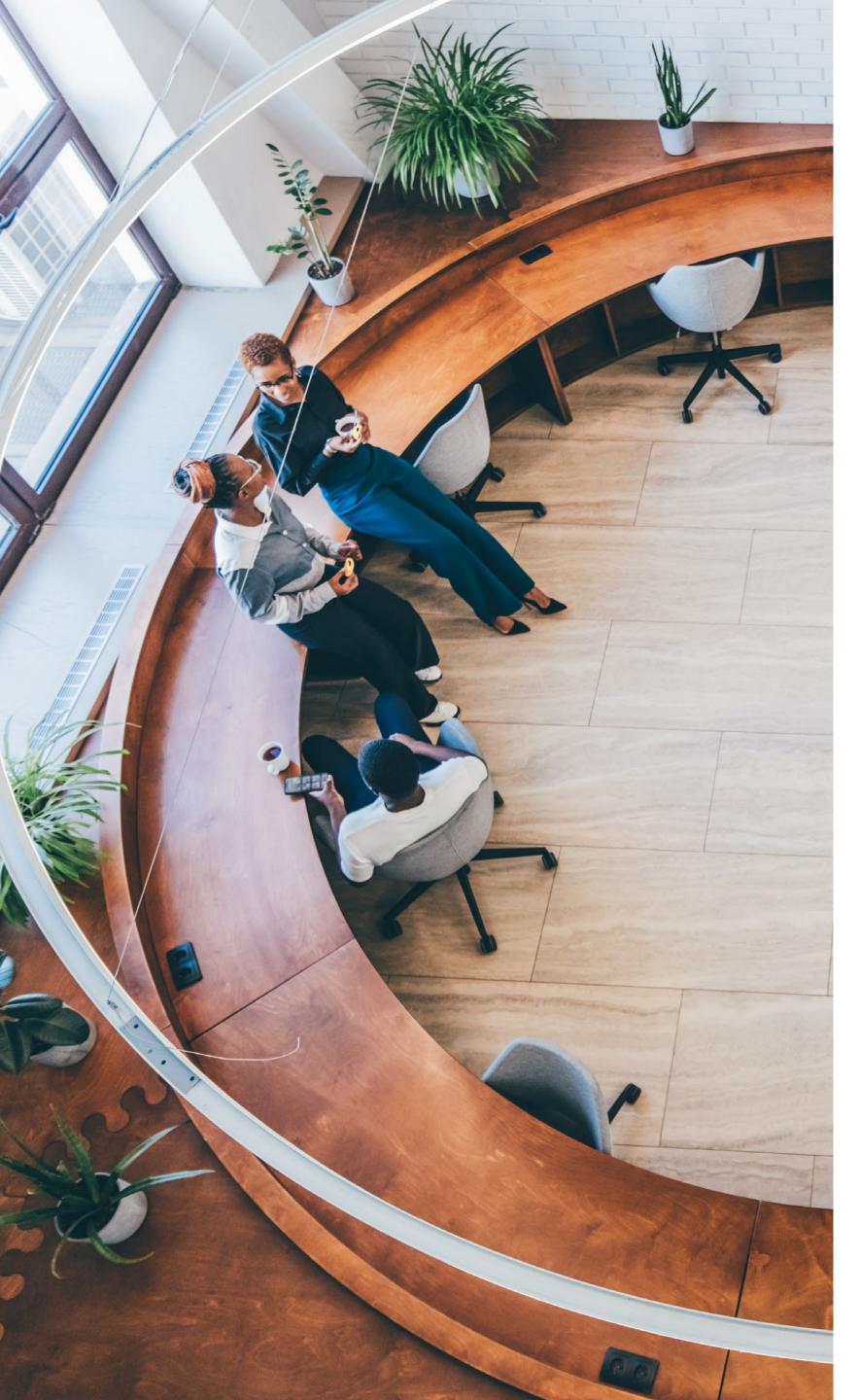


## Build your marketing AI house on a foundation of trust

Adopters in our research are quickly setting the stage for multi-agent marketing ecosystems where agentic AI creates full marketing campaigns, journeys and programs using GenAI prompts. As this scales, quantum will quickly come into view. But organizations need to establish appropriate AI enablers before progressing to multi-agent systems that operate alongside users. Those enablers are what actively and continuously apply trust to marketing technology, including data governance, ethics and guidelines, training and enablement, testing and optimization, and perhaps most importantly – humans in the loop. Because at the end of the day, technology is just an enabler. Without the human element – the one thing all research respondents agree on – brands cannot build the trust that leads to lasting customer loyalty.

To learn more about **SAS Customer Intelligence 360**, visit **sas.com/marketing** 





### About this research

The survey was conducted by Coleman Parkes Research in June and July 2025 and targeted 300 marketers in organizations across key sectors globally.

It follows a 2024 survey of 300 marketers in similar organizations. Survey respondents work across a range of sectors: banking, insurance, the public sector, life sciences, health care, telco, manufacturing, retail, energy and utilities and professional services. Their job titles include director of marketing, director of digital marketing and VP of marketing. The smallest organizations we surveyed employed a workforce of 500-999 people and the largest had more than 10,000 employees.

#### Geographical coverage

Americas 99 (USA, Canada, Brazil, Mexico)

EMEA 160 (UK/Ireland, Sweden, Norway, Finland, Denmark,

France, Germany, Italy, Benelux, Spain, Poland, Turkey,

UAE/Saudi Arabia, Africa)

APAC 41 (Japan, Australia, China, Southeast Asia)

#### **About Coleman Parkes**

Coleman Parkes is a full-service B2B market research agency specializing in IT/technology studies, targeting senior decision makers in SMB to large enterprises across multiple sectors globally.

For more information, contact **Stephen@coleman-parkes.co.uk** 

#### **About SAS**

SAS Customer Intelligence solutions provide organizations around the world with industry-leading MarTech and AdTech capabilities. Powerful audience targeting and management, comprehensive identity resolution and a unique hybrid data architecture enable marketers to personalize experiences, influence behaviors and deploy messages across the entire customer life cycle.

To learn more, please visit **sas.com/marketing** 



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