IDC [Quanta]

The 2027 AI Investment Case

IDC research with the benchmarks behind your next ask

2.2x

GenAI spend is growing more than twice as fast as the rest of the AI stack.

Source:Worldwide AI and Generative AI Spending Guide, Forecast, 2024–2027 vintage

$940.5B

Worldwide AI/GenAI spend, 2026.

Source: Worldwide AI and Generative AI Spending Guide

MARKETING MATURITY

The marketing maturity gap is organizational, not technological

Training penetration and process scope separate transforming marketing organizations from nascent ones, before any tool gets selected.

62% vs. 17%

Share of transforming marketing organizations with at least half their team trained in AI marketing skills, versus nascent organizations.

~55% vs. 35%

Average share of marketing processes re-architected for AI, transforming orgs versus nascent orgs.

Source: IDC's 2025 AI Marketing Benchmark: Architecting Marketing for AI (n=513, November 2025)

MATURITY BENCHMARK

Where transforming marketing organizations pull ahead

Governance, sponsorship, and strategic scope carry more weight than any single tool decision.

Maturity Signal	Transforming Organizations	Nascent Organizations
Change management	Ongoing, executive-sponsored, tied to unified orchestration	Ad hoc efforts show no correlation to improved maturity
Martech budget priority	77.5% prioritize martech platforms; 60.5% prioritize AI enablement/ops	Advertising and events still lead spend
AI governance	Aligned to enterprise AI governance; proactive risk management	38% have no formal framework at all
Strategic scope	AI used to redefine competitive position	1 in 3 have no formal AI marketing strategy

Source: IDC's 2025 AI Marketing Benchmark: Architecting Marketing for AI (n=513, November 2025)

THE CMO ROLE

The CMO role is expanding, and the ROI case is already building

Peers ahead of the curve are budgeting for a bigger remit, not just a bigger AI line item.

33%

CMOs who expect their role to expand — new title, added responsibility across market intelligence, revenue orchestration, and AI governance.

29%

Marketers expecting 10–14% additional marketing ROI from GenAI investment over the next 12–18 months.

12%

Marketers expecting 20%+ additional marketing ROI from GenAI investment over the same period.

Sources: IDC's 2025 AI Marketing Benchmark: Architecting Marketing for AI (n=513, November 2025); IDC's 2024 Tech Marketing Spending Benchmark Survey (n=42–43 B2B tech companies)

GOVERNANCE

Governance maturity is becoming a purchase criterion

Vendors selling agentic AI platforms, tooling, or managed services are being evaluated on governance maturity as a purchase criterion, not just agent capability. 83% of organizations are using or adopting agentic AI within 12 months, and 73% of buyers already believe excessive AI spending is a major risk.

83% **using or adopting agentic AI within 12 months.**

73% **believe excessive AI spending is a major risk.**

14% **have guardrails across the full AI stack.**

Sources: IDC's 2025 AI Marketing Benchmark: Architecting Marketing for AI (n=513, November 2025); IDC's 2024 Tech Marketing Spending Benchmark Survey (n=42–43 B2B tech companies)

GOVERNANCE

The marketing budget conversation: Attribution and AEO blind spots signal a governance gap

ATTRIBUTION & AEO

IDC Finding: 69% of transforming organizations (vs. 41% of nascent) prioritize marketing attribution as an emerging KPI; answer-engine visibility remains a near-universal blind spot.

Recommended Action: Vendors should position attribution/AEO tooling as a pre-budget-lock conversation with transforming-tier prospects. The KPI gap is already validated, the tooling category is not yet owned.

MARTECH BUDGET SHIFTS

IDC Finding: Among "transforming" organizations, **77.5% prioritize martech platforms and 60.5% prioritize AI enablement/operations**, while advertising and events decline in priority as AI maturity rises.

Recommended Action: Balance portfolio to reallocate spending towards building AI ready data and infrastructure, while shifting campaign tactics to better engage an AI-first buyer.

WHY THIS MATTERS

IDC Finding: Agentic AI governance is not a post-deployment add-on; organizations that delay it face compounding risk as agent populations and regulatory obligations scale, and AI governance platform spending is forecast to reach **$8.4 billion by 2030.**

Recommended Action: Require your own martech and AI-enablement vendors to demonstrate governance-ready design — auditability, explainability, non-human identity life-cycle support — as a procurement condition, not a post-contract request.

Sources: IDC Survey Spotlight: What Marketing Success Metrics Will Become More Important as a Result of AI Marketing?;2025 AI Marketing Benchmark: Architecting Marketing for AI; Tech Marketing Investment Guide for 2025 Planning; Autonomy on a Leash: A Framework for Agentic AI Governance; IDC's Market Glance: Agentic AI Platforms, 2Q26

Get this data for your own plan before FY2027 locks.

The benchmarks in this brief are IDC Quanta's starting point, not your finished plan. Book a working session and we'll size these numbers against your sector, region, and budget line.

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