The Agentic Divide

The market is rushing toward agentic marketing — even if not everyone agrees on who should own it, or what it takes to get there.

Kana × Gather · A study of 225 marketing, data & AI leaders at large enterprises

METHODOLOGY

225 senior leaders at large enterprises, across three roles shaping agentic marketing

The Agentic Divide surveyed **225 senior marketing, data, and AI leaders** at U.S. enterprises with $250M+ in revenue or 3,000+ employees, fielded May 2026. All three role cohorts cleared 50 respondents (AI leaders n=115, marketing n=59, data n=51); cross-role comparisons are adequately powered, though AI leaders remain the largest group. Percentages may not sum to 100 due to rounding and multi-select questions. Every figure traces to a specific survey question, noted beneath each chart.

115

AI leaders — CAIO, Head of AI/ML, Director AI Transformation

59

Marketing executives — CMO, SVP & VP Marketing

51

Data executives — CDO, VP Data, Head of Data Science

A note on reading the cohorts

AI leaders responded in far greater numbers than marketing or data executives. The three-way comparisons in this report are directional rather than evenly powered, and cross-role findings should be read as signals to validate, not settled fact. All respondents are at U.S. enterprises with $250M+ revenue or 3,000+ employees.

EXECUTIVE SUMMARY

The market is rushing toward agentic marketing, even if not everyone agrees on who should own it, or what it takes to get there.

Agentic marketing is already in production, the leaders running it are broadly confident, and the category is unresolved on a single question: who owns it. These are the seven conclusions the data most clearly supports.

01 The market is past experimentation.
70% already run custom AI agents in production; only 3% use no marketing AI at all.

02 Ownership is contested.
40% default to the Chief AI Officer. Marketing alone argues for its own function.

03 Confidence runs high, and early.
76% call governance ready for supervised AI decisions; just 4% say it isn't.

04 The trajectory is steep.
82% expect agents to run a third or more of routine decisions within two years.

05 The roles agree on the use cases.
All three cohorts name the same first priorities: personalization and optimization.

06 Spend is competitive, not curious.
74% are raising AI budgets; fear of moving too slowly outranks every other risk.

07 No single barrier dominates.
Eight blockers cluster from 3.08 to 3.44; skills, governance and data quality lead.

Finding 01 MARKET MATURITY

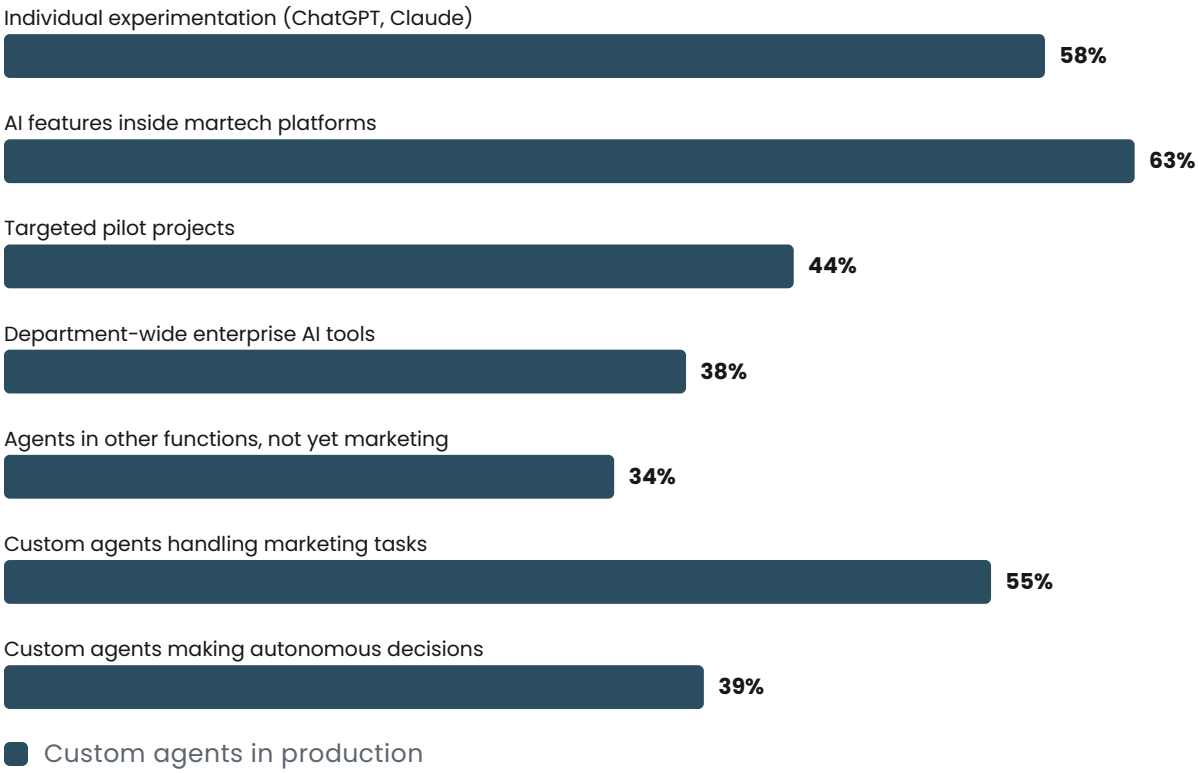
70% already run custom AI agents in production. This market is past experimentation.

Custom agents handling real marketing tasks are now more common than pilot projects. Only **3%** report no AI use in marketing at all. The category has moved from curiosity to infrastructure, and messaging that treats these buyers as beginners will miss them. The harder question is what sits behind that adoption. **Many of these agents may be live inside enterprise environments without being enterprise-grade**, and it is worth asking whose lens built them, whether they act on insights drawn from real data or simply dress up AI-driven dashboards, and whether they will hold up under the tests of trial, scale, and time.

SURVEY QUESTION

"Which of the following best describes how your organization is using AI in marketing today?"

Q7 · Select all that apply · Multi-select, so percentages exceed 100 · n=225



Finding 02 THE DIVIDE

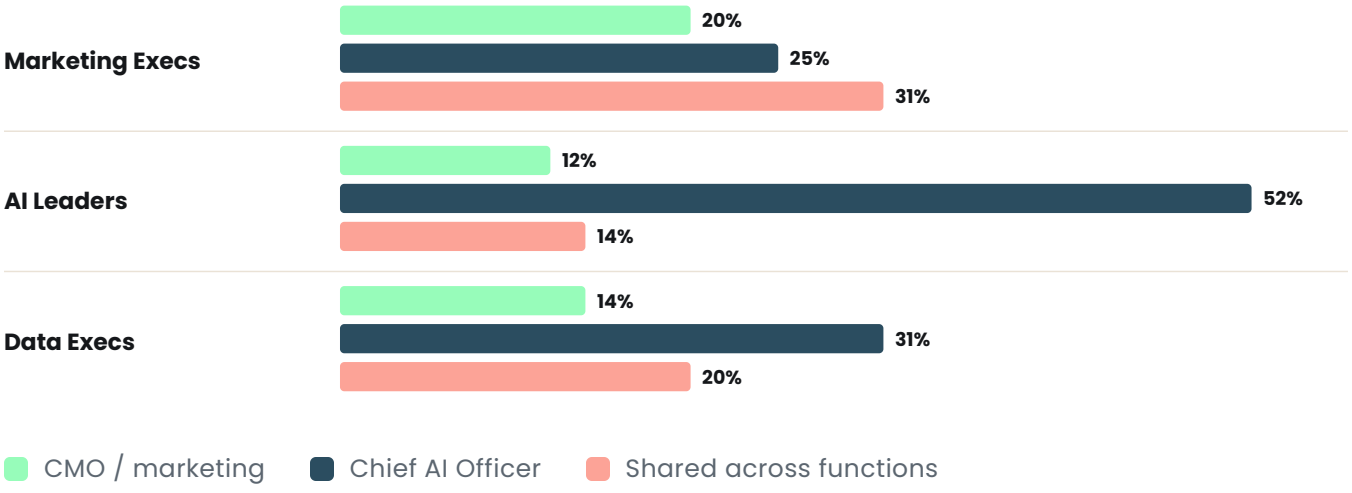
Every role defaults to the Chief AI Officer. Marketing is the holdout still arguing for itself.

Across the full sample, 40% say the Chief AI Officer should own agentic marketing. Marketing executives are the exception: they are the only cohort that leans toward their own function and toward shared ownership. That gap is the divide. The same initiative is being claimed by different leaders depending on who you ask. The deference to the Chief AI Officer is understandable, since CMOs do not see themselves as the AI experts. But if every function defers the same way, the Chief AI Officer is left overloaded, and marketing leaders will need to step back in as the domain experts on the customer rather than ceding the ground entirely.

SURVEY QUESTION

"Who in your organization should be primarily responsible for the strategy and execution of agentic marketing?"

Q3 · Single select · Marketing n=59, AI Leaders n=115, Data n=51



Finding 03 SELF-ASSESSED READINESS

Four in five say their governance model is ready for supervised AI decisions.

Leaders rate themselves prepared across all three readiness dimensions, with 76% calling their governance model ready and just 4% calling it unready. Confidence this high, this early, is itself a finding worth probing. **It may signal genuine maturity, or it may signal that the hardest governance questions have not yet been tested in production.** The latter looks more likely. Data hygiene and governance are rarely ready for agentic AI without concentrated effort, so confidence at this level reads as optimism running ahead of reality. Paired with the share who expect agents to make a meaningful portion of decisions within two years, it points to a wave of issues organizations will have to resolve in the near term.

SURVEY QUESTION **"On a scale of 1 to 5, how would you rate your organization's readiness in each of the following areas?"**

Q5 · Showing % rating 4–5 of 5 ("ready to go or already underway") · n=225



Finding 04 24-MONTH TRAJECTORY

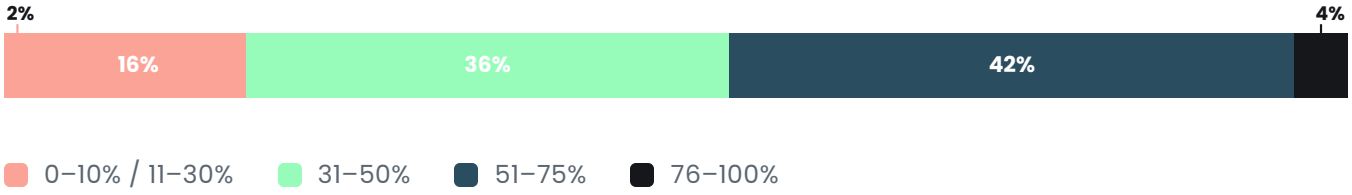
82% expect AI agents to run a third or more of routine marketing decisions within two years.

Half of respondents (46%) expect agents to handle a majority of routine decisions inside 24 months. This is the clearest signal in the study. The question for most organizations is no longer whether to delegate marketing decisions to agents, but how quickly. That optimism about autonomy carries a note of blind faith. It tends to underestimate how much work, and how many people, it still takes to keep these systems performing well, which is a gap worth watching as expectations meet production.

SURVEY QUESTION

"In 24 months, what percentage of routine marketing decisions do you expect will be handled by AI agents with human oversight?"

Q8 · Single select · n=225



Finding 05 WHERE THE ROLES AGREE

Ask any role what they want first, and you hear the same answer.

We expected the three cohorts to prioritize different use cases. They do not. Marketing, data, and AI leaders all name the same near-identical priorities, often in the same words. The divide is about who owns agentic marketing, not about what it should do first. **That level of agreement on where to point agents is encouraging, but it also looks like paving an existing path.** The focus on campaign optimization and personalization reflects a still-developing view of where agentic AI could open genuinely new routes to market and reach segments that were never part of the plan. Some of the consensus likely traces to the pressure to show concrete AI return, since optimization and conversion gains are the easiest outcomes to tie back to cost and customer-acquisition efficiency.

SURVEY QUESTION

"What's the highest-priority agentic marketing use case for your organization in the next 12 months?"

Q9 · Open text, verbatim with question stem trimmed · Marketing n=59, Data n=51, AI Leaders n=115

Marketing Execs

- Automating campaign optimization and personalized customer targeting
  Technology / SaaS
- Automating personalized campaign creation and optimization across channels to improve lead conversion
  Healthcare
- Implementing automated customer segmentation for personalized B2B lead nurturing.
  Manufacturing

Data Execs

- Personalized customer targeting and campaign optimization.
  Technology / SaaS
- Real-time, hyper-personalized customer journey orchestration.
  Technology / SaaS
- AI-driven campaign optimization and personalization at scale.
  Technology / SaaS

AI Leaders

- Personalized campaign optimization across channels at scale.
  Financial Services
- Automated personalized customer journeys across channels to improve engagement, conversions, retention and campaign efficiency.
  Manufacturing
- Automated campaign optimization and personalized customer targeting.
  Financial Services

THE COMMON GROUND

Across every cohort, two themes lead: **personalized, real-time customer engagement** and **autonomous campaign optimization across channels**. Because the destination is shared, use-case messaging can speak to the whole buying group at once. The role-specific work is in ownership and governance, not in the use case itself.

Finding 06 WHAT DRIVES THE SPEND

The pressure is competitive, not curious. The concern about moving too slowly outweighs every operational risk.

Concern about moving too slowly outranks every operational risk, including security and data privacy. Pair that with **74% increasing budgets** and the picture is a market spending to keep pace, led by revenue and customer-experience upside rather than cost cutting. **The weight of that competitive fear suggests the push toward agentic marketing is driven as much by anxiety as by a clear plan**, which helps explain why adoption so far has looked scattershot and impatient rather than measured.

74%
are increasing marketing AI investment in the next fiscal year

69%
are concerned about competitive disadvantage from moving too slowly

31%
rank revenue lift as the most compelling reason to invest

SURVEY QUESTIONS

Drawn from three questions on investment direction, competitive-risk concern, and the most compelling reasons to invest.

Q14 investment direction · Q12 competitive-risk concern (% rating 4–5 of 5) · Q16 ranked business outcomes (% ranking #1) · n=225

Finding 07 WHERE IT STALLS

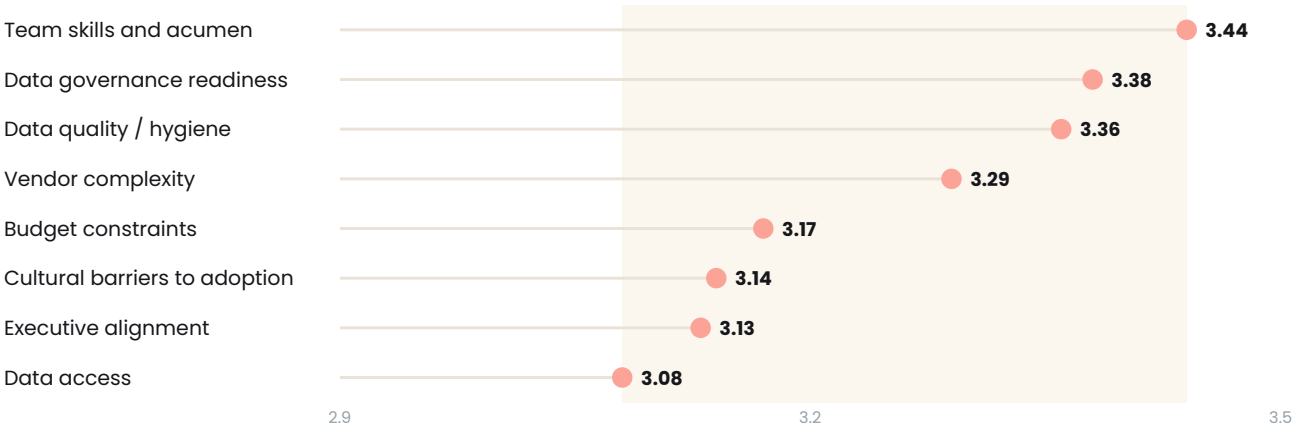
No single barrier dominates. The obstacles are real but evenly spread.

Eight potential blockers all cluster between 3.08 and 3.44 on a five-point scale. There is no one thing to fix. Team skills, data governance, and data quality edge slightly ahead, which means progress depends on steady work across people and data rather than a single unlock. That ranking is also telling. Data governance and data quality landing second and third, just behind team skills, sits awkwardly against the 76% who called their governance ready in the readiness question. The same leaders who rate themselves prepared also name data governance among their biggest obstacles, which reinforces the gap between self-assessed readiness and what production will demand.

SURVEY QUESTION

"On a scale of 1 to 5, how much is each of the following slowing your organization's agentic marketing progress?"

Q17 & Q18 · Mean score, 1 (not an obstacle) to 5 (significant obstacle) · n=225



WHAT THE MARKET SHOULD TAKE AWAY

Four conclusions the data supports

01 The market is past the case for adoption.

With 70% already running custom agents and only 3% not using AI at all, the open question is no longer whether to adopt agentic marketing. It is how to scale and govern what is already in production.

02 Ownership is the unresolved question.

Most roles point to the Chief AI Officer, while marketing leans toward shared ownership and its own function. Until enterprises settle who is accountable, agentic marketing initiatives risk stalling between teams that each assume someone else owns the outcome.

03 Confidence is running ahead of proof.

Leaders rate themselves highly ready (76% on governance), yet name data governance and quality among their top barriers. That tension suggests readiness is self-assessed rather than production-tested, and the hardest governance questions are still ahead.

04 Urgency is competitive, not operational.

Concern about moving too slowly outweighs every operational risk, and 69% fear falling behind peers. With 82% expecting agents to run a third or more of decisions within two years, the pace of adoption is being set by competitive pressure rather than by readiness.

ABOUT KANA

Founded in 2025 by Tom Chavez and Vivek Vaidya, the marketing technology pioneers behind Krux, Rapt, and Habu, Kana delivers agentic marketing applications custom-built to your goals and architecture with enterprise-grade scale and security. Backed by Mayfield. Based in San Francisco. Learn more at **www.kana.ai**.

Kana × Gather

The Agentic Divide

© 2026 Kana.ai · Research conducted with Gather

Research powered by gather