MartechTribe

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The State of Martech 2025 in Education

Three Big Bets to Future-Proof Your Business

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Table of contents

Foreword

In the history of the world, there have been a few moments so monumental, they fundamentally impacted the entire human race. The pandemic was one of those moments. Among other things, it increased our reliance on technology exponentially, and we have not looked back.

And today, we are in the midst of another profound shift. The proliferation and democratization of AI are rapidly and dramatically changing technology and processes before our very eyes.

The Education sector has wildly evolved over the past five years. And as you'll learn in this report, there is still more that lies ahead. By embracing the impending technology shifts, Educational institutions can deliver personalized, meaningful learning environments that result in a deeper understanding of the material and improved learning experience.

The State of Martech 2025 in Education is rooted in research and provides recommendations for creating human-centric, actionable go-to-market technology strategies. We hope you find these insights valuable.

Sara Faatz
Director Technology Community Relations
Digital Experience Team at Progress

Introduction

In the past, a diploma or degree could sustain a working career for 30 years.[1] Nowadays, its relevance may fade in just 4 to 6 years as technology and job requirements evolve ever faster[2]. The half-life of a job skill is about five years[3], and learners are responding by seeking faster, more flexible, and more targeted learning options.

Ten years ago, the fastest path to career growth was a formal degree. Today, it's a six-week online course you can finish online. That's not a trend. It's a seismic shift in how education creates value.

Our research shows that outperforming education institutions don't wait for disruption; they lead it. Instead of clinging to legacy programs or platforms, they invest in specific Martech capabilities aligned with evolving learner behaviors. Those who don't risk more than enrollment drops. They risk becoming irrelevant in a market that values speed, flexibility, and personalization.

What Are Education Organizations?

Education organizations include a wide range of institutions such as research universities (e.g., Harvard, UVA), business schools (e.g., INSEAD, London Business School), specialized training institutes (e.g., General Assembly, Beeckestijn Business School), and online learning platforms (e.g., Coursera, Udemy).

They serve students, professionals, and lifelong learners and often use marketing and learning technology to attract, enroll, and engage participants. Many offer degree programs, short courses, and professional certifications, ranging from academic study to skill-based training, often designed to meet evolving labor market and industry needs.

[1] World Economic Forum - "How to keep up with the future of work", 2017
[2] McKinsey & Company - "Skill shift: Automation and the future of the workforce", 2018
[3] IBM - "The enterprise guide to closing the skills gap", 2020

A New Metric to Evaluate Martech

Based on five years of data science research, we introduced a new and meaningful metric for evaluating Martech: Stack Value. A "stack" refers to the combination of tools a company, or a specific business unit, uses to engage customers across service, marketing, content, and analytics.

The Stack Value methodology helps organizations quickly see in a single chart where to invest (Green Martech), where to evolve cautiously (Amber Martech), and where to rationalize tools that add cost without great customer value (Red Martech), all tailored to their specific vertical. This empowers teams to make decisions that directly drive customer engagement and business performance.

Consider CMS: In the Nonprofit sector, it's categorized as Green Martech, delivering high value at an average maturity of 2.7. In BFSI, it's Amber Martech—valuable for the right use cases when kept at a moderate maturity level of 2.2. In Education, CMS is seen as Red Martech, requiring the right expertise to reach a high maturity of 3.0 to deliver foundational impact.

Our research is grounded in over a decade of analysis: 1,500+ real-world Martech stacks, 14,000+ tools available on MartechMap.com, and 4,500+ curated requirements from our independent proprietary data warehouse, spanning 16+ industries and 30+ countries. These data points are mapped against capability maturity benchmarks based on the Capability Maturity Model (CMMI) from the Carnegie Mellon University.[4]

Understand What Drives Martech Value

One of our key insights is that higher maturity isn't always better. Especially in Red Martech, we found that chasing maturity for its own sake can add cost without improving outcomes. By contrast, industry outperformers show a distinct pattern, investing in the right capabilities at the right time, which correlates with higher revenue-per-employee ratios.

For this industry report, we combined our industry benchmarks with how leading analyst firms forecast the future of Education. We identified the most compelling industry shift and the impact on their go-to-market models and Martech investments. This report summarizes that evolution in three big bets so you can start preparing for the future today.

[4] Wikipedia - CMMI Model

The Shift From Degrees to Dynamic Learning

The education industry is undergoing a fundamental transformation. Traditional degree-focused learning is giving way to modular, skills-based education. Institutions that once centered their business models around long-term degree programs now see a growing demand for flexible, personalized learning. This shift is driven by evolving learner expectations, employer requirements, and technological advancements.

- More than 77% of learners report career benefits, such as getting a new job, earning a promotion, gaining applicable career skills, and more.[5]
- From 80% in-person classes (2019) to 60% hybrid classes (2023).[6]
- From 70% standardized curriculum (2019) to 50% personalized learning plans (2023).[7]
- From 10 million daily meeting participants on Zoom in December 2019 to 350 million by the end of 2020.[8]
- From 40 million users on Google Classroom in early 2020 to over 150 million users by the end of 2021.[9]

A Real-World Example

Consider an employee who, a decade ago, would have pursued a formal master's degree to advance in their career. Today, the same individual can complete a six-week AI-powered content strategy course on Coursera, add the certification to their LinkedIn profile, and become eligible for a promotion without ever stepping foot in a university.

[5] Coursera - "Learner Outcomes Report", 2023
[6,7] McKinsey & Company - "What do higher education students want from online learning?", 2022
[8,9] Wikipedia - "Impact of the COVID-19 pandemic on education"

How Learner-Centric Thinking Reshapes Go-to-Market Strategy

The shift toward flexible, learner-centric models is changing how education providers go to market. Traditional GTM strategies focused on entire degree programs and static enrollment cycles. But today's learners seek targeted outcomes, personalized learning, and on-demand access. This demands a different approach, one that aligns with how students search, decide, and engage.

Three priorities now define modern go-to-market in education:

Big Bet #1: Multi-Channel Course Delivery
Learners want flexibility instead of formality. They expect hybrid delivery that fits their schedule and life.

Big Bet #2: Learner-Driven Course Customization
Learners want relevance, not repetition. They expect content tailored to their needs, skills, and pace.

Big Bet #3: Expanding the Number of Online Channels
Learners want interaction, not just information. They expect dynamic, multi-channel engagement beyond static LMS portals.

These shifts aren't aspirational. They're already underway among outperformers. Institutions that respond now with the right Martech investments can turn disruption into a strategic advantage.

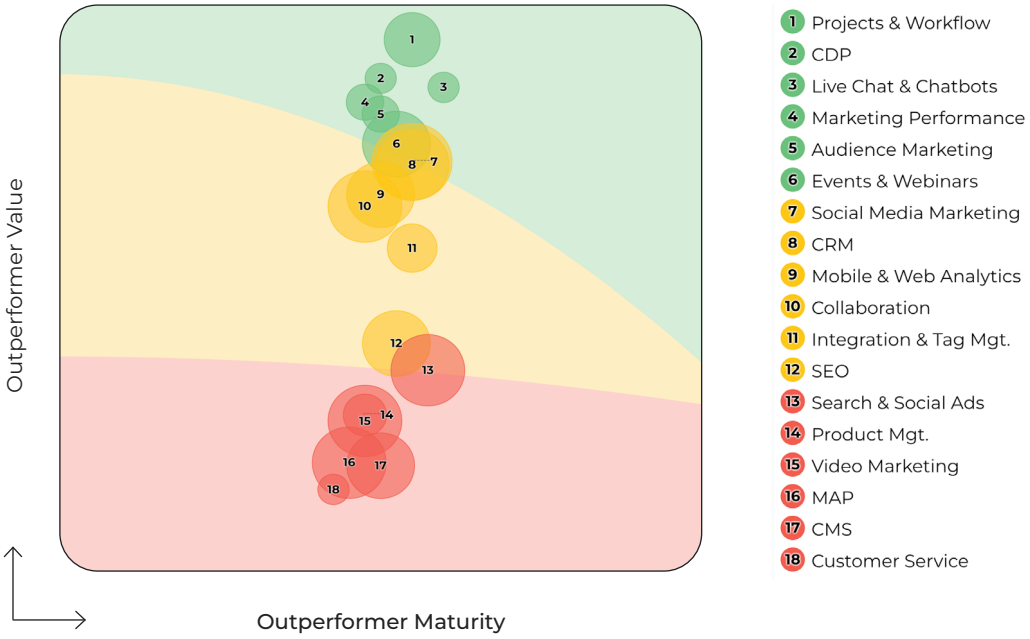
Why Act Now on Technology & AI?

Educational institutions use a wide variety of marketing technologies with different levels of success. The quadrant below demonstrates which technologies are used and which ones contribute most to company value (left axis). The right axis shows how proficient (mature) educational institutions are to reap those benefits.

Educational institutions must invest in scalable digital infrastructure to remain competitive. At the heart of this transformation is the role of Content Management Systems (CMS) and Digital Experience Platforms (DXP). These technologies allow universities and learning platforms to deliver personalized, omnichannel experiences, ensuring students receive relevant content across multiple touchpoints.

These technologies ensure a seamless omnichannel experience and provide relevant and real-time engagement. The need to adapt is urgent, as for years, these technologies have operated in silos, failing to deliver a cohesive learning experience. No one role owns the stack with a cross-organizational mandate, and that lack of ownership is reason enough to act now on technology.

Stack Value Quadrant - Educational Institutions



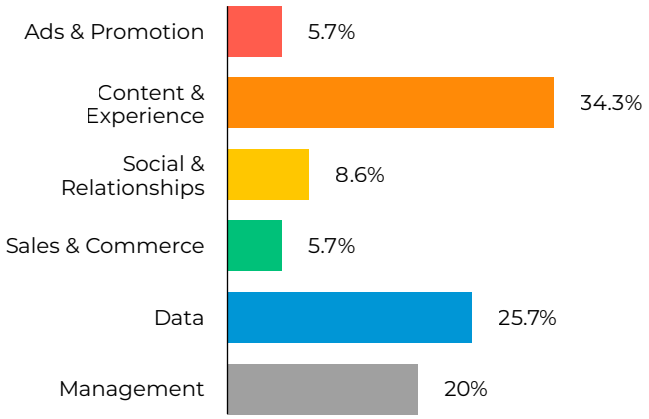
Note:
Bubble size = prevalence in Outperformer Stacks

But that's not all, there's also Generative AI. 69% of educational institutions state they have an AI policy.

Do you have a GenAI policy?[10]

Educational organizations use GenAI mostly in *content scenarios*, such as brainstorming, creating, and producing copy, but also testing content results is used. Not surprisingly, outperformers are already very proficient with using *Personalization & Testing* tools (see the first Big Bet). In the context of content, Generative AI is also being used for *Image/ Video Ideation* as well as *Audio/Podcasts Production* for sharing learning experiences and testimonials.

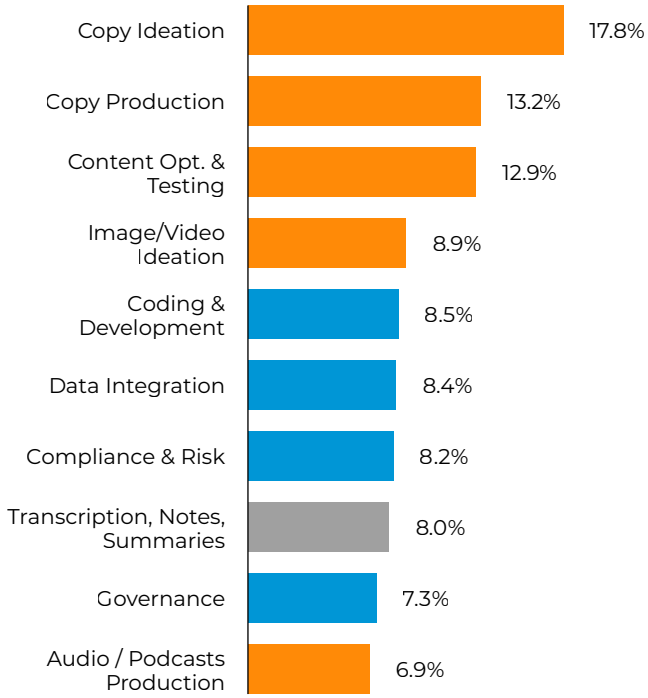
GenAI Adoption by (AIDARI) Category[11]



As 100% of all outperforming education institutions are using *Social Media Marketing*, they embrace GenAI to give their efforts an extra push. There are quite a few *Data* use cases adopted in educational institutions. Using GenAI for *Coding & Development* in this vertical is likely aimed at enhancing CMS or DXP capabilities, combined with *Personalization and Testing*. GenAI is also used for *Data Integration* across different platforms. Think of inserting customer data into systems, messages, posts, or apps. This is a welcome addition alongside the moderately successful use of *Integration & Tag Management* (see *Big Bet #1*).

Finally, educational institutions that have a GenAI policy in place use GenAI for *Compliance & Risk* and *Governance* purposes, aligning with broader goals of corporate responsibility.

Top 10 GenAI Use Cases[12]



[10,11,12] Data source: 2024 GenAI Survey, chiefmartec & MartechTribe
[11,12] 35 recorded use cases (13 organizations responded)
Additional resources about AIDARI categories

The Three Big Bets

This report introduces three big strategic bets, each driven by technological advancements and evolving customer behavior and backed by research and proprietary data. These bets come with actionable go-to-market technology recommendations grounded in our unique Stack Value research.

1. **Hybrid Learning Models**
   Move from traditional classroom formats to multi-channel course delivery by developing hybrid curricula and investing in digital infrastructure.
2. **Personalized Learning Paths**
   Shift from generalized curricula to learner-driven course customization using adaptive learning technologies, personalized content, and student data analysis.
3. **New Online Engagement Models**
   Transition from passive consumption to dynamic, multi-channel engagement by expanding online channels, integrating platforms, and tailoring communication to specific behaviors.

	Big Bet 1	**Big Bet 2**	**Big Bet 3**
Shift	**FROM** Traditional Classroom Learning **TO** Hybrid Learning Models	**FROM** Generalized Curriculum **TO** Personalized Learning Paths	**FROM** Passive Digital Engagement **TO** New Online Engagement Models
Strategy	**Multi-Channel Course Delivery**	**Learner-Driven Course Customization**	**Expanding the number of online channels**
Tactics	1. Develop hybrid curricula 2. Invest in digital infrastructure	1. Implement adaptive learning technologies 2. Develop educational content for curricula. 3. Collect and analyze student data	1. Build a clear view of potential learners 2. Develop integrated digital platforms 3. Use behavioral data to refine messages and formats
Technology	1. Product Management, CMS, Projects & Workflow, Personalization & Test 2. Integration & Tag Management, Agile & Lean Management, Audience Marketing, Collaboration	1. Personalization & Test, CDP, Live Chat & Chatbots 2. CMS, CRM, Customer Service, MAP 3. CDW, CDP, Audience Marketing	1. Mobile & Web Analytics, SEO, CMS, Audience Marketing 2. Live Chat & Chatbots, Events & Webinars, CMS, Social Media Marketing 3. MAP, Search & Social Ads, Video Marketing

#1 Multi-Channel Course Delivery

The Shift
Traditional education relied on in-person instruction and fixed schedules. But as student needs and lifestyles evolve, flexibility is no longer a luxury; it's expected. Learners increasingly demand hybrid models that allow them to toggle between online and in-person formats, with seamless transitions and access anytime, anywhere.

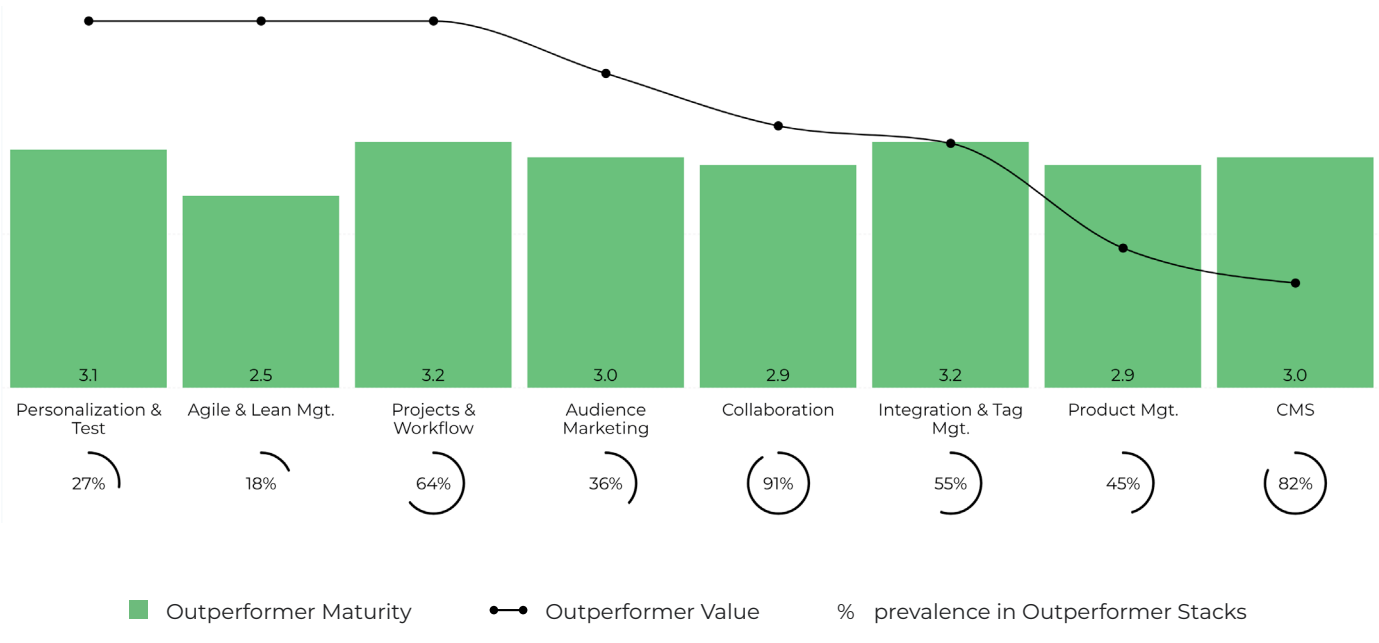
The Big Bet
Institutions must bet on hybrid and flexible learning models that support multi-channel course delivery. This isn't just about adding an online option, it's about designing curricula that intentionally blend digital and physical learning environments, giving students the ability to personalize their own path through education.

Tactics
To enable this evolution, education organizations should:

- Develop hybrid curricula that work across formats
- Invest in digital infrastructure that enables anytime access.

Technology's Role
For this bet, Green Martech delivers increasing value as proficiency grows (capability maturity), based on our research.

Multi-Channel Course Delivery-stack



Develop hybrid curricula. Online learning platforms (LMS) are not regarded as Martech, but developing and managing complex curricula is. Martech tools such as *Product Management* help plan, structure, and iterate learning propositions. Outperformers also benefit from *Projects & Workflow* tools, which support the operational side of curriculum development, and *Personalization & Test* platforms, which are used to validate and refine new learning formats based on learner response. Meanwhile, the *CMS* remains essential for delivering personalized course content publicly and consistently across formats, even with ordering and booking-like capabilities.

Invest in digital infrastructure. Scalable infrastructure is the backbone of hybrid education. Tools like *Integration & Tag Management* enable Martech platforms to connect with Learning Management Systems and third-party tools. *Agile & Lean Management* platforms help institutions organize and evolve their learning models iteratively, often outperforming widely-used traditional *Collaboration* tools in this vertical. Outperformers also use *Audience Marketing* platforms to design and test propositions targeted to specific learner segments, helping ensure the infrastructure supports both performance and personalization.

#2 Learner-Driven Course Customization

The Shift
The one-size-fits-all classroom is giving way to tailored educational experiences. Students expect their learning journey to reflect their pace, interests, and knowledge gaps. Supported by AI and analytics, it is now possible to better deliver on that expectation at scale.

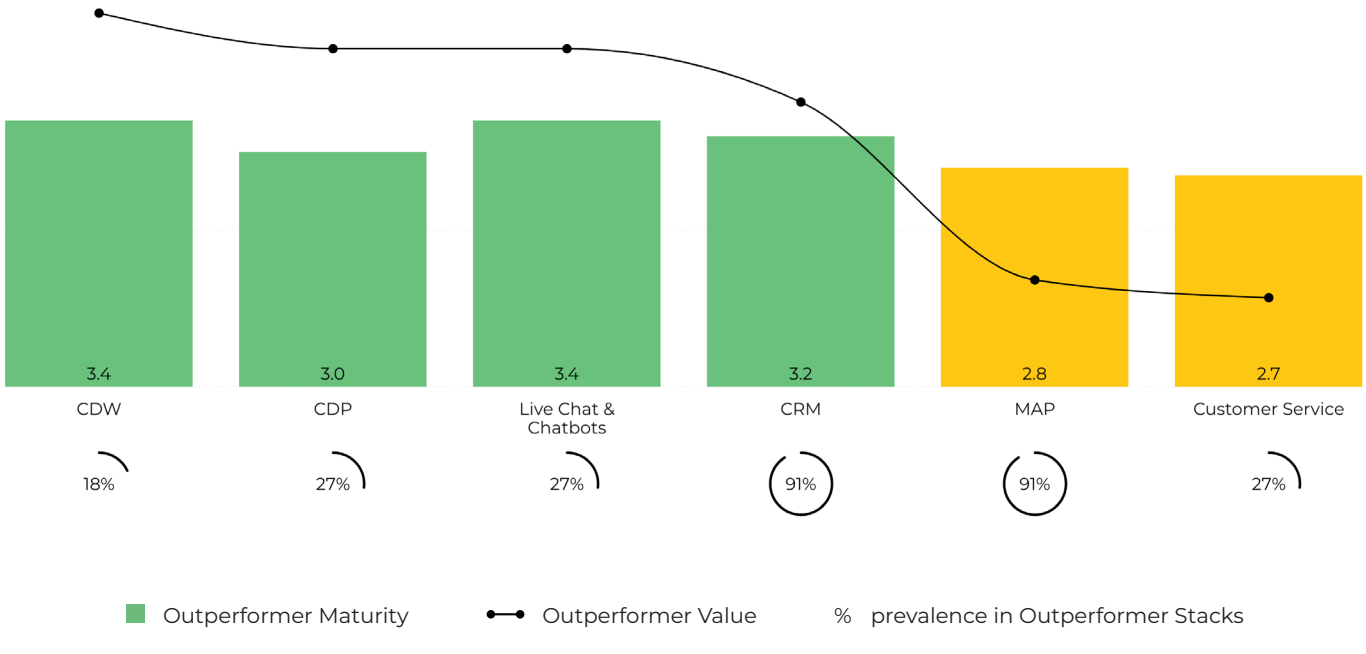
The Big Bet
Institutions must bet on learner-driven course customization powered by adaptive learning technologies. This means using real-time data to tailor content, adjust the difficulty, and provide targeted support, turning education into a dynamic, individualized experience.

Tactics
To support this bet, educational organizations need to:

- Implement adaptive learning platforms that respond to individual progress
- Develop high-quality educational content designed for modular delivery
- Continuously collect and analyze student data to refine experiences.

Technology's Role
For this bet, Green Martech delivers increasing value as proficiency grows (capability maturity), while Amber Martech provides foundational value when applied with care and skill, based on our research.

Learner-Driven Course Customization-stack



Implement adaptive learning technologies. To support customized learning at scale, institutions lean on *Personalization & Test* tools that dynamically adjust content and progression paths. These are increasingly supported by *CDP*s like TreasureData, Sitefinity Insight, or Hightouch, which consolidate learner profiles and behaviors to inform adaptations. In some cases, L*ive Chat & Chatbots* provide critical real-time support during adaptive experiences.

Develop educational content for curricula. Modular, high-quality content requires strong foundational tools. *CMS* platforms power the digital delivery layer, while *CRM* systems help manage learner communications. *Customer Service* tools and *MAP* platforms (Marketing Automation) support outreach and re-engagement, particularly when integrated with data systems. However, the Martech impact in this area varies, as these tools often show limited value without skilled application and a selective use of functionality.

Collect and analyze student data Outperformers rely on *CDW* (like Snowflake or AWS) and *CDP* systems to make sense of student interactions across platforms. These tools help surface insights used to optimize the experience and predict learner outcomes. Complementary to these, *Audience Marketing* platforms add another layer by using data enrichment and modeling to identify which learners need what type of support next.

#3 Expanding the number of online channels

The Shift
The digital classroom has expanded beyond LMS logins and video lectures. Learners now expect interactive, social, and immersive experiences that match the platforms they use daily. Passive consumption is no longer enough, engagement must feel dynamic and two-way.

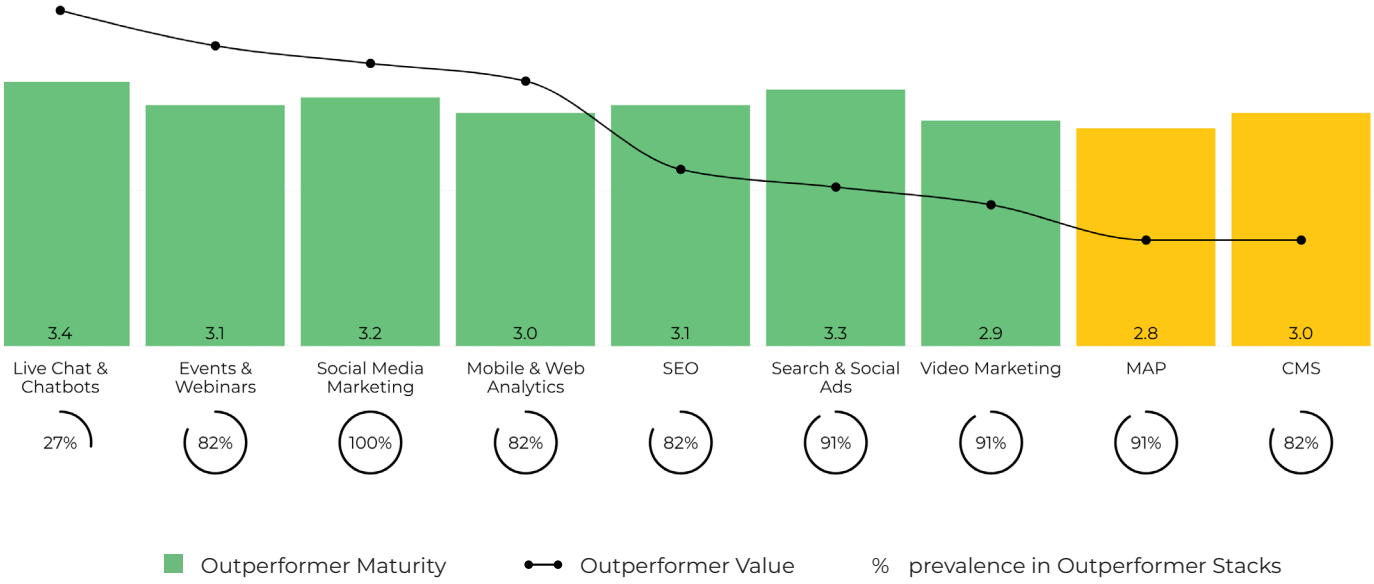
The Big Bet
The big bet is on expanding the number of online channels and rethinking engagement models. Institutions must show up where their learners are, and tailor interactions to the nuances of each channel, from webinars to social media to personalized experiences.

Tactics
To meet these expectations, institutions should:

- Build a clear view of potential learners across platforms
- Develop integrated digital platforms that deliver cohesive journeys
- Use behavioral data to refine messages and formats in real time.

Technology's Role
For this bet, Green Martech delivers increasing value as proficiency grows (capability maturity), while Amber Martech provides foundational value when applied with care and skill, based on our research.

Online Channel Expansion-stack

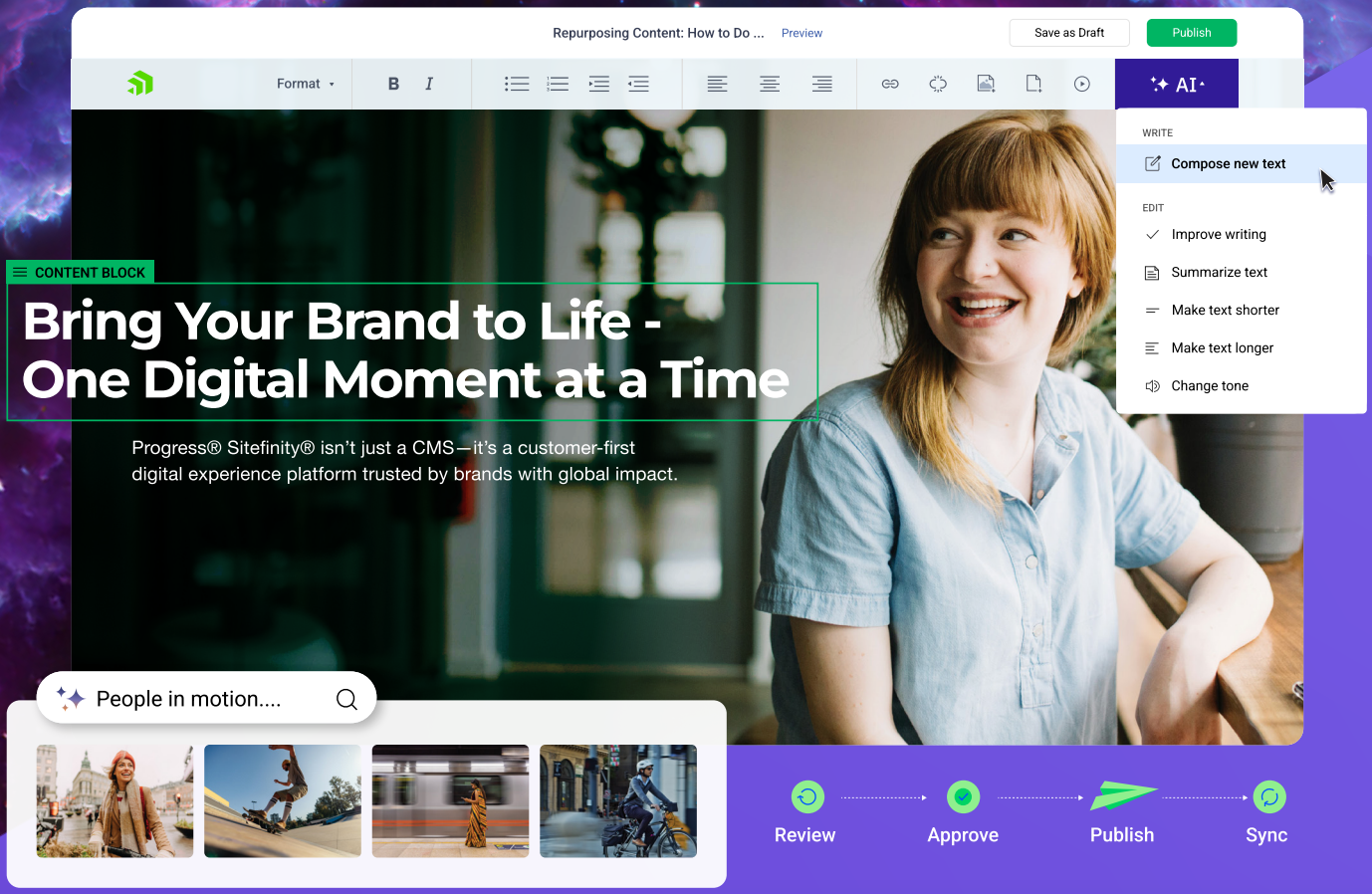


Build a clear view of potential learners. Engagement begins with insight. Tools like *Mobile & Web Analytics* (e.g., Google Analytics) help institutions understand how visitors behave across platforms, while *SEO* and *CMS* ensure learners can find and access relevant content easily. *Audience Marketing* tools support deeper segmentation and persona development, helping organizations craft outreach tailored to real behavioral data.

Develop integrated digital platforms. Institutions that offer cohesive experiences across webinars, websites, and social platforms rely heavily on *Live Chat & Chatbots, Events & Webinars,* combined with *CMS* platforms. These tools must work together to deliver journeys that feel intentional and fluid. Outperformers also lean on *Social Media Marketing* to connect with learners where they spend their time and use these channels to extend learning experiences beyond the LMS.

Use behavioral data to refine messages and formats. Institutions use *MAP* platforms to deliver automated and behavior-based messaging at scale. *Search & Social Ads* (like Google Ads) help boost visibility and reach, while *Video Marketing* platforms such as Vimeo, Vidyard, or Brightcove allow institutions to create more immersive and story-driven formats. While widely used, many of these tools only perform well when integrated tightly with learner data and applied skillfully to the specific channel and context.

FROM HERE TO INFINITY



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About The Author

Frans Riemersma founded MartechTribe, a company specializing in Martech research and benchmarking.

With 30+ years in consultancy, he combines qualitative expertise with quantitative Martech data on stacks, vendors, and requirements in a proprietary Martech Data Warehouse.

He is the author of *A Small Book on Customer Technology* and co-author of *Marketing Tech Monitor*, *Customer Technology Sector Trends*, and *Hello Firstname*.

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