

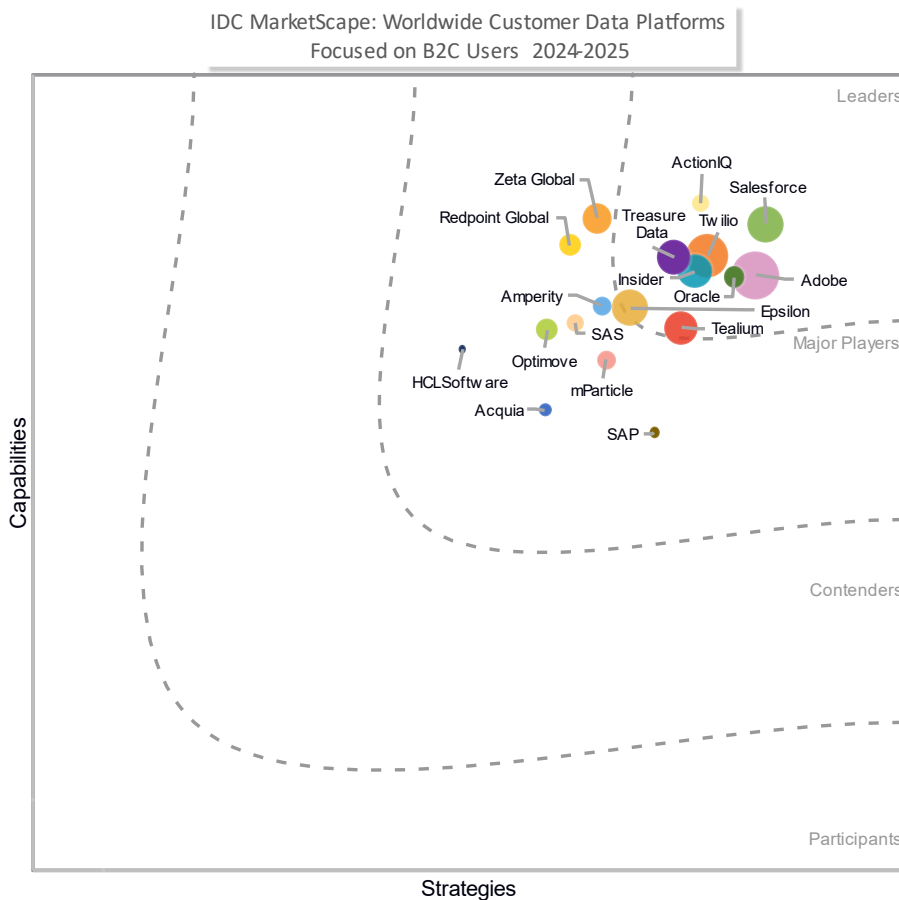
# IDC MarketScape: Worldwide Customer Data Platforms Focused on B2C Users 2024–2025 Vendor Assessment

Tapan Patel      Gerry Murray

## IDC MARKETSCOPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Customer Data Platforms Focused on B2C Users Vendor Assessment



Source: IDC, 2024

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

## IDC OPINION

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When you are operating in highly competitive B2C markets, customer experience (CX) matters more than ever. It is a strong driver of financial growth and organizational outcomes and sets leaders apart from followers. Consumers expect hyper-personalized interactions across channels based on their experiences with other brands and digital natives. B2C organizations are adopting customer data platform (CDP) technologies that can unify and activate customer data and insights for batch or real-time marketing use cases across various touch points. While marketing and advertising use cases still dominate implementations, the CDP market has undergone a transformation in the past one to two years and will continue to do so in the coming years, reflecting broader shifts in consumer demands.

There are multiple ways to sort CDP solutions into comparable cohorts based on target user personas, company size, and industry markets. IDC decided to conduct the analysis based on two industry market segments — B2C and B2B. Both B2C and B2B companies need CDPs to effectively manage and activate customer data, but the reasons for adopting CDPs and the technical requirements differ between these business models due to the distinct nature of their customer relationships, journeys, and engagement strategies. This document reviews customer data platforms focused on the B2C segment, users, and use cases. A separate document that reviews CDPs focused on the B2B segment, users, and use cases is also available (see *IDC MarketScape: Worldwide Customer Data Platforms Focused on B2B Users 2024–2025 Vendor Assessment*, IDC #US50514223, December 2024).

### **Expanding CDP Capabilities to Meet Evolving B2C Needs**

From IDC study and research conducted for this document, CDPs are no longer just aggregating data, unifying profiles, and building segments in customer deployments. B2C customers are also using data management, predictive analytics, campaign treatments, and activation capabilities for orchestrating personalized, data-driven customer journeys across all touch points in a secure and privacy-compliant manner. IDC continues to see CDP vendors improving their user interface (UI) and adding generative AI (GenAI) and chat-based tooling to increase the adoption of their CDP offerings. In parallel, more users with data management and data science skills are engaging with data in CDPs to drive data consistency and build AI models. Vendors are trying to address their needs with CDP composability, cloud data warehouse (DW) integrations, data quality and data observability, plug-ins for data science frameworks and languages, and API support.

## Unifying Customer Experiences to Drive Value

A primary driver of CDP adoption in B2C is the need to facilitate cohesive, real-time engagement across multiple channels. As brands interact with customers across digital and physical touch points, real-time data activation becomes essential to delivering personalized product recommendations, targeted offers, and timely communications. This kind of omni-channel orchestration enables B2C companies to offer seamless, personalized experiences across all phases of the customer journey. Industries such as retail, travel, financial services, and hospitality benefit significantly from these capabilities, as they rely on frictionless customer experiences to foster loyalty and engagement. The ability of CDPs to support consistent customer journeys — whether the journeys start in-store, through customer service, online, or on social media — is critical. By aligning customer data across channels, these platforms enable brands to reduce friction, making interactions smoother and more meaningful.

The conversation around CDP investments for B2C organizations increasingly centers on demonstrable outcomes. While traditional marketing and customer metrics provide the foundation for evaluating ROI, very few B2C organizations are exploring deeper insights to understand which data sources, profiles, and customer attributes are being leveraged most effectively across various functions. As organizations increasingly rely on data to guide customer interactions, they are evaluating how different teams leverage unified customer profiles and which data sources yield the most impact.

The rapidly changing preferences and behaviors, consumers demanding transparency around data collection and usage, and a challenging macroeconomic environment have raised the stakes. B2C organizations must meet the needs of a diverse, multigenerational customer base or risk losing them to competitors. Leading and demonstrating with customer data-centric culture, alignment of CDP technology with overall CX strategy, customer data value measurement, and strong data and AI governance will help B2C companies elevate customer relationships and drive significant business outcomes.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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The criteria for inclusion of CDP vendors in this IDC MarketScape analysis are as follows:

- The offering should be commercially available for use as a discrete, standalone CDP product or as part of a CX or marketing suite, and customers should have purchased it for at least one year. (IDC will consider and include new product features and capabilities that vendors introduced through the calendar year 3Q24 as part of the vendor strategy and capabilities evaluation.)

- The product must natively provide a core set of capabilities and functions for designing, activating, and managing customer data as per IDC's market definition (refer to the Appendix).
- Most of the vendor's CDP solutions must be for front-office use cases in marketing, advertising, ecommerce, loyalty, customer service, product, or sales functional areas within B2C organizations.
- Most of the vendor's users must be in the following functions: marketing technology and operations, data science and analytics, IT, DataOps and data operations, and privacy and compliance.
- The product must be offered, supported, and available on a worldwide basis (i.e., in at least two global regions).

## ADVICE FOR TECHNOLOGY BUYERS

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As B2C organizations strive to personalize engagements, provide connected customer experience at scale across digital and physical touch points, and maximize the value from customer and enterprise data, CDPs are foundational to the data layer in the martech solution stack.

IDC offers the following advice to technology buyers and users evaluating and selecting a customer data platform:

- **Look beyond marketing use cases:** Justify investments in CDP to not just support real-time use cases in traditional marketing and advertising functions to acquire and retain customers but also help deliver unified data for use cases across all customer-facing functions (e.g., service and sales) in the business.
- **Prioritize real-time personalization:** Depending on the use case, opt for CDPs capable of delivering real-time, low-latency dynamic personalization. Evaluate the CDP's ability to handle high volumes of data, real-time identity resolution, and activation across various customer touch points. Request performance metrics and conduct performance testing during the evaluation phase.
- **Cookie deprecation and the role of CDPs:** With Google introducing a user-controlled cookie experience, prepare for a cookieless future, including a focus on zero- and first-party data strategies. Second-party data from multiple data sources (e.g., data clean rooms and data vendors) will be the preferred method of expanding the target audience.
- **Go beyond structured data sources:** Consider how unstructured and semi-structured data sources (e.g., VOC, contact center, and chat logs) can further augment customer profiles and serve as training data for AI. Increased

generative AI use in CDPs will drive interest in vector databases and retrieval-augmented generation (RAG) to tap knowledge bases.

- **Data architecture and composability:** With the rising adoption of cloud data warehouses and databases as sources of customer data, buyers are looking for bidirectional interoperability with CDPs using zero-copy/reverse extract, transform, load (ETL); query federation; or data sharing methods. This has also spurred interest in providing composable CDPs wherein one or more modules deliver a specific functionality set with a modular approach to fit into the tech buyer's architecture.
- **GenAI capabilities to augment CDP use cases:** Evaluate and pilot how generative AI capabilities will make it easier for nontechnical users, increase the productivity and data literacy of CDP users, provide new benefits, or improve outcomes by using CDPs to create segments, content, and journeys and explore insights.
- **Governance, privacy, and trust:** Select a CDP that offers data governance, data quality, data observability, and consent management capabilities, including compliance with privacy regulations to deliver and differentiate on the basis of providing reliable, consistent, and trusted insights and actions. With the increase in the use of GenAI-based agents, copilots, or AI assistants, organizations need to maintain a strong focus on this criterion.
- **Rising demand for omni-channel activation capabilities:** Customers interact with brands across various channels, so CDPs are now facilitating personalization across these channels and activating campaigns natively or through third-party engagement systems from the CDP. Weigh how CDPs will help simplify the tooling, spending, and complexity associated with campaign execution in your existing martech stack.
- **Prioritize support, service, and go-to-market (GTM) strategies:** While CDP capabilities are important and widely available, tease out how vendors' GTM strategies will align with your maturity and needs. Consider criteria such as the partner ecosystem, licensing and pricing flexibility, onboarding and customer success programs, user communities, localized sales, and technical support for ongoing deployment.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations that determine a vendor's position in the IDC MarketScape. While the report evaluates every vendor against each of the criteria in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

# Acquia

After a thorough evaluation of Acquia's strategy and capabilities, Acquia is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Acquia is a private company founded in 2007 and is the commercial company behind the Drupal open source web content management system. The company is headquartered in Boston, Massachusetts, and its enterprise customer data platform, Acquia CDP, is primarily used by marketers looking to build consistent and personalized experiences.

Acquia CDP is sold both as a standalone solution and as part of the Acquia Open Digital Experience Platform (DXP). The platform enables organizations to unify customer data, create centralized profiles, and use analytics tools, including predictive models, which provide valuable insights into customer behavior. These insights can be used to build targeted segments of customers to deliver personalized experiences across multiple channels.

Quick facts about Acquia include:

- **Employees:** 1,200
- **Industry focus:** Retail, CPG, manufacturing, healthcare, and financial services
- **Cloud:** Cloud-native, multitenant, and single tenant
- **Pricing model:** Subscription based
- **Primary CDP products:** Acquia CDP
- **Partner ecosystem:** A mature community of active system implementation partners
- **Original product GA date:** 2006
- **Most recent version and release date:** Operates on a continuous release schedule with no version numbers

## Strengths

- **Audience creation and segmentation:** Acquia CDP enables the creation of complex audience segments with default filters assisting in targeting the right audience and more than 160 standard rules to define, narrow down, or expand inclusion in the audience.
- **Identity resolution:** Acquia CDP's built-in Identity Resolution Engine uses deterministic and probabilistic matching and a configurable process to create customer profiles and journeys over time, which can then be accessed through a user interface or an API.

- **Integrations:** Acquia CDP has integrated with Acquia’s Digital Experience Platform, which allows for a unified approach to content management, marketing automation, and personalization.

## Challenges

- **Self-service:** While they are user-friendly, advanced features such as custom attributes, calculations, data models, and reports are complex to use for nontechnical users. Acquia CDP has recently launched new self-service features to enhance the user experience and needs to introduce additional out-of-the-box native connectors to ingest data from new sources.
- **Real time:** Acquia is currently focused on improving CDP capabilities for real-time use cases, including real-time identity resolution and journey orchestration. It has added features for real-time data ingestion in recent releases to leverage event-driven transactions. From a composability standpoint, Acquia needs to add support for a hybrid approach where data can exist within a CDP and a data warehouse.
- **Artificial intelligence:** Acquia CDP offers limited AI support for identifying the best content and journeys. Availability of AI “copilots” to analyze data, create segments, and activate campaigns is on the road map.

## Consider Acquia When

The top 3 challenges that Acquia’s customers are solving are creating a 360-degree customer view, managing customer data, and improving customer experience. Enterprises based primarily in North America and EMEA — particularly those that already have investments in Acquia’s Content Management System (CMS) or optimization solutions — should consider Acquia, especially those in the retail, consumer goods, financial services, and healthcare industries.

## ActionIQ

After a thorough evaluation of ActionIQ’s strategy and capabilities, ActionIQ is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

ActionIQ CDP offers hybrid composable architecture for marketing, IT, and data professionals to activate data securely across the B2C customer journey, unifying sources to build smart audiences, resolve identities, and design personalized interactions, all while aiding in data governance and cost management. ActionIQ’s CDP supports federated queries to any cloud data warehouse and gives the option to host data like a traditional CDP and query from both sources at the same time. This unique hybrid-composable approach is ideal for complex enterprise environments and B2C brands across the world leverage it.



Quick facts about ActionIQ include:

- **Employees:** Does not share this data (private company)
- **Industry focus:** Cross-industry focus (including financial services, retail, media, and CPG)
- **Cloud:** AWS
- **Pricing model:** Software license and consumption
- **Primary CDP products:** ActionIQ
- **Partner ecosystem:** A partner network that includes Snowflake, Google, Amazon, Databricks, Merkle, Acxiom, and Teradata
- **Original product GA date:** 2016
- **Most recent version and release date:** NA

## Strengths

- **Hybrid composable architecture:** ActionIQ offers organizations the flexibility to choose where and how they store, process, and leverage data with their existing data infrastructure investments. Clients can choose to copy data to ActionIQ, keep data in the data warehouse and push down queries, or combine both approaches.
- **Data management:** ActionIQ offers a full set of data management capabilities, including data ingestion, synchronization, data modeling and schemas (e.g., customers, stores, and devices), data enrichment, and identity resolution. These capabilities provide a foundation for audience segmentation, personalized marketing content and messages, and cross-channel campaign activation.
- **Artificial intelligence:** ActionIQ provides descriptive, predictive, and prescriptive AI capabilities to support B2C use cases, including churn management, customer lifetime value, product recommendations, and personalization. These capabilities are further augmented with generative AI features for creating audience descriptions and an AI assistant to help identify attributes and audiences.

## Challenges

- **Global footprint:** While ActionIQ serves global brands, its international presence, local datacenter availability, additional language support for product training, and documentation are areas for improvement. Expanding its footprint will help serve B2C clients and use cases better and enhance support for local teams.
- **Real-time data handling:** ActionIQ provides historical and real-time data unification, channel activation, and personalization capabilities. However, the company is working on integrating real-time queries directly into clients'



streaming infrastructures, such as Kafka or Spark Streaming, and expanding capabilities for real-time journey support.

## Consider ActionIQ When

Consider ActionIQ where IT and data teams play a role in decision-making, and organizations need to operationalize their data warehouse for marketing use cases in B2C industries. The hybrid composable architecture and data management capabilities will provide flexibility and control over the data sources, storage, and processing needed for various use cases. Organizations requiring high-volume personalization and journey orchestration in media and entertainment, retail and ecommerce, travel and hospitality, and banking will also benefit from ActionIQ's CDP.

## Adobe

After a thorough evaluation of Adobe's strategy and capabilities, Adobe is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Adobe is a multinational public company with headquarters in San Jose, California. Adobe was founded in 1982 and has historically specialized in software for the creation and publication of creative content. The Adobe Real-Time CDP is part of Adobe Experience Cloud.

Adobe Real-Time CDP is built natively on the Adobe Experience Platform to facilitate connectivity with Adobe's CX solution portfolio and third-party systems. It encompasses workflows, dashboards, democratized AI/ML, sources, governance, real-time profiles, data collaboration, data federation, integrated destinations for marketing, and 360-degree customer view use cases for B2C users. Profiles are assembled and refreshed in real time for people and accounts with AI-driven audience building and activation. Adobe Real-Time CDP is built on a patented data governance framework with advanced controls — data usage labeling and enforcement, Privacy and Security Shield, data expiration, attribute access controls, and managed keys.

Quick facts about Adobe include:

- **Employees:** Over 30,000
- **Industry focus:** Solutions for industries such as financial services, healthcare, media and entertainment, high tech, education, retail, government, manufacturing, travel and hospitality, and telecommunications
- **Cloud:** Multitenant and cloud native
- **Pricing model:** Subscription-based and consumption-based licensing models

- **Primary CDP products:** Adobe Real-Time CDP B2C and B2P (business-to-person) editions, Adobe Real-Time CDP Connections, Adobe Real-Time CDP Collaboration, and robust add-ons, including Federated Audience Composition, Healthcare Shield, Privacy and Security Shield, and more
- **Partner ecosystem:** An extensive global partner community with some of the world's largest systems integrators (SIs), consultancies, and agencies
- **Original product GA date:** November 2019
- **Most recent version and release date:** September 2024; releases updates to Real-Time CDP on a monthly cadence

## Strengths

- **Real-time processing:** Ongoing investments in building real-time capabilities, including streaming data ingestion, segmentation, and activation, and its Adobe Experience Platform Edge Network continues to qualify Adobe for handling low-latency use cases.
- **Analytics and artificial intelligence:** Real-Time CDP offers AI and ML capabilities for a range of B2C use cases — demographic- and psychographic-based segmentation, propensity modeling, journey analysis, campaign optimization and recommendations, and understanding customer behaviors — and dashboards to visualize results from AI-driven actions.
- **Governance:** Adobe's trust and governance framework, including data usage labeling and enforcement, content filtering, security and privacy certifications with unified dashboards, and controls for data stewards is of interest to B2C firms to meet privacy-safe personalization goals.
- **Composability:** Adobe Real-Time CDP provides a balanced, unified platform approach to composability — from an activation layer on top of a data warehouse, audience composition from federated data, and packaged CDP ingesting data from various customer, transactional, product, and other sources.

## Challenges

- **Complexity:** Adobe Real-Time CDP, being part of the CX stack, can introduce complexity and require customization for advanced use cases. New productized use case playbooks and improvement in internal product integrations will ease the learning curve and increase adoption for marketers in the B2C segment and for organizations new to Adobe's ecosystem.
- **Data ingestion and identity resolution:** To keep up with customer requirements, Adobe could make more native data ingestion connectors available for unstructured data sources and bidirectional to/from CDP support.

While configurable/rules-based identity resolution is on the road map, it needs to consider adding probabilistic and machine learning-based techniques.

- **Generative AI:** While Adobe has released generative AI capabilities to query data and surface insights and create personalized B2C content (Adobe Firefly), it currently lacks GenAI capabilities to segment audiences and create and optimize journeys. The latter capabilities are on Adobe's upcoming product road map.

## Consider Adobe When

Consider Adobe especially if you already have significant investments in Adobe Experience Cloud and/or Creative Cloud solutions. For B2C organizations in need of real-time data connectivity, analytics, and governance needs, Adobe should be part of the evaluation. The top 3 challenges that Adobe B2C customers are solving include improving customer experience, 360-degree customer view, personalization, and customer data management. Customers in large enterprises that need global solutions, services, and support should consider Adobe, especially those in the manufacturing, banking and payments, retail, media and advertising, and travel and hospitality industries with diverse data sources.

## Amperity

After a thorough evaluation of Amperity's strategy and capabilities, Amperity is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Amperity is a private company founded in 2016 with headquarters in Seattle, Washington. The Amperity CDP is a B2C Lakehouse customer data platform for creating customer data assets using first-party data. Amperity's customer profiles come with industry-specific attributes, predictions, and insights that can be enhanced with second- and third-party data and that users can access through a point-and-click interface or via SQL tools. From a go-to-market standpoint, Amperity plans to increase its international presence in certain English-speaking countries and target IT/data personas.

Quick facts about Amperity include:

- **Employees:** 300
- **Industry focus:** Retail, travel and hospitality, QSRs, sports leagues and teams
- **Cloud:** Multitenant
- **Pricing model:** Consumption (flat, based on amount used)
- **Primary CDP product:** A Lakehouse CDP
- **CDP GTM partners:** Dozens of independent software vendors (ISVs) and SIs, including Databricks, Snowflake, Deloitte Digital, and Slalom

- **Original CDP product GA date:** 2016
- **Most recent version and release date:** Releases platform updates continually

## Strengths

- **Speed and scale:** Amperity is strong in this key area for enterprise CDP buyers, as the speed, scale, and response time for processing large volumes of customer data are important enablers of personalization and customer experience.
- **Delivery:** Amperity provisions its solution through a multitenant model on AWS or Azure. Amperity's CDP solution has a user interface that is customizable and configurable by job role and by individual user. Users are also able to make significant configurations without using code.
- **Identity resolution:** The proprietary identity resolution engine uses machine learning to match and merge customer data from various complex data environments. It provides transparency into how and why data is matched, which is useful for organizations looking to build accurate customer profiles.

## Challenges

- **Globalization:** Amperity has acceptable capabilities for global customer deployments and implementation partners but offers customer support, documentation, and training in fewer languages and has less localized sales and customer support.
- **Campaign execution:** Amperity shares customer segments with third-party systems for campaign execution instead of having native channel support directly woven into the CDP or through third-party engagement systems for campaign execution.
- **Partnering:** Amperity's partner ecosystem is less robust, although the company does offer an implementation partner certification program.

## Consider Amperity When

Consider Amperity when you are looking for a standalone CDP solution. The top 3 challenges that Amperity's customers are solving are creating a 360-degree customer view, customer data management, and personalization. Customers in large enterprises based primarily in North America, Australia, and EMEA should consider Amperity a strong choice, especially those in the financial services, retail, and travel and hospitality industries.

# Epsilon

After a thorough evaluation of Epsilon’s strategy and capabilities, Epsilon is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Epsilon, part of Publicis Groupe, a publicly traded company, is headquartered in Irving, Texas. Epsilon’s CDP product Epsilon Customer is a first-party data marketing solution for midmarket and enterprise clients. Built on connected identity, it delivers a unified view of individual customers across owned and paid channels so marketers can natively execute the high-performing activation through a self-service environment. Epsilon offers CDP, clean room, loyalty, messaging, and media activation solutions to customers with flexible licensing and pricing models.

Quick facts about Epsilon include:

- **Employees:** 10,000+
- **Industry focus:** Automotive, CPG, financial services, healthcare, restaurants, retail, travel, and hospitality
- **Cloud:** Multitenant, cloud native, and hybrid
- **Pricing model:** Subscription based, perpetual, and consumption based
- **Primary CDP products:** Epsilon Customer
- **Partner ecosystem:** Publicis Groupe, Databricks, Amazon, Yahoo, Meta, and The Trade Desk, among others
- **Original product GA date:** April 2018
- **Most recent version and release date:** October 17, 2024

## Strengths

- **Data management and identity:** Epsilon Customer provides automated identity resolution, integrated data enrichment, data source ratings, and collaboration for data owners. It provides data (or data-related) dashboards for customer attributes, data sources, use cases, and campaign management.
- **Analytics and AI:** Epsilon Customer has embedded analytics capabilities for marketing attribution, churn modeling, customer life-cycle modeling, journey analysis, campaign engagement, goal setting, optimization, and recommendations. The analytics workbench environment allows for custom AI/ML model creation and leverages native AI/ML models to drive marketing use cases.
- **Activation and engagement:** Epsilon Customer offers activation across the web and walled gardens with direct connections to major channels, enabling media

delivery and measurement. It also provides a broad set of capabilities for native and third-party campaign execution and support for various digital and offline channels.

## Challenges

- **Partnerships:** Epsilon has a few implementation and systems integration partners, including certified ones, in North America and EMEA for its CDP product. Epsilon established partnerships with Databricks and Publicis Digital Experience in 2024 as part of its market and geographic go-to-market expansion plans.
- **Usability and UI customization:** Epsilon Customer allows for the UI customization of role-based interfaces and guided analytics. UI customizations of business metrics, card/tile interfaces, personalized landing pages, and data visualization are not available and are on Epsilon's road map.
- **Activation testing:** Epsilon Customer offers multiple testing capabilities for marketers and analysts but does not offer multivariate and multiarmed bandit types of tests and does not provide campaign optimization features for course correction.

## Consider Epsilon When

Consider Epsilon if you are a midmarket or large enterprise based primarily in North America and EMEA, particularly in the retail, automotive, financial services, life sciences, manufacturing, and restaurant industries. The top 3 challenges Epsilon customers solving are customer acquisition and unification of customer journeys, optimization of marketing activities, and identity resolution. Epsilon is a strong choice, especially if you already have investments in other Epsilon solutions and if enterprises are looking for well-rounded identity resolution, analytics, activation, and compliance capabilities from their CDP solution.

## HCLSoftware

After a thorough evaluation of HCLSoftware's strategy and capabilities, HCLSoftware is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

HCLSoftware, the software business division of HCLTech, builds, markets, sells, and supports solutions in four key areas: digital transformation, data and analytics, AI and intelligent automation, and enterprise security. HCLSoftware acquired Unica from IBM in 2019 for \$1.8 billion. HCL Unica is a marketing automation platform including cross-channel campaign management, budgeting and planning, journey orchestration, cross-channel delivery, real-time personalization, and data management.

HCL CDP is a newer offering and is part of the HCL Unica portfolio. HCL CDP provides a framework to integrate with and collect data from multiple sources and process data, which provides customers with the ability to make timely marketing decisions and actions. Key capabilities of HCL CDP include customer identity management, real-time custom segmentation, predictive analytics, and real-time personalization. From a go-to-market standpoint, HCL CDP is available globally with an emphasis on the APAC region.

Quick facts about HCLSoftware include:

- **Employees:** 10,000
- **Industry focus:** Banking and payments, insurance (general and life), manufacturing, telecommunications, and retail
- **Cloud:** On premises, hybrid, and single tenant models
- **Pricing model:** Consumption and performance/outcome based
- **Primary CDP products:** HCL Enhanced Data Collection
- **Partner ecosystem:** Partners with a variety of systems integration and implementation partners
- **Original product GA date:** February 2024
- **Most recent version and release date:** February 2024

## Strengths

- **Data schemas:** HCL CDP offers native support for data schemas or attribute sets for most industry verticals and B2C entities (e.g., customers, accounts, products, stories, and transactions). It can manage data schemas “on read” and “on write.”
- **Data management:** HCL CDP offers out-of-the-box support for different data types, data filtering, data enrichment services with third-party data, identity and clean room providers, and data-related dashboards. HCL’s road map calls for integration with Zeenea and Actian to improve data lineage and data integration capabilities.
- **Campaign execution:** HCL CDP stands out for its support for executing campaigns for channels directly from the CDP or share segments and campaigns through third-party engagement systems. It also supports many digital/online and offline channels for campaign activations. Campaign performance, engagement, journeys, churn, attribution, and marketing metrics can be quickly measured with built-in analytics and dashboards.

## Challenges

- **Generative AI:** HCL CDP’s Marketing Copilot capability is limited to analyzing customer insights and setting up reports and dashboards. The future road map



calls for Copilot to assist in creating customer journeys and segmenting audiences.

- **UI customization:** The current HCL CDP's user interface and capabilities are suitable for technical users, and HCL allows UI customization of card/tile interfaces and data visualization. UI customizations of business metrics, personalized landing pages, guided analytics, role-based UI, landing pages, and natural language search are not available.
- **Limited connectivity:** HCL CDP offers fewer native connectors for data ingestion and activation into destination systems. The road map calls for integration with Actian Connect and the HCL Link framework for additional native connector support.
- **Globalization:** HCL is a relatively new entrant to the CDP market. While it is executing its go-to-market strategy for HCL CDP, its product's UI is English only, and customer deployments are limited to India. Under the umbrella of HCLSoftware, the company has sales and customer support, training, and documentation available in multiple languages and regions.
- **Partners:** While HCLSoftware and HCL Unica have global partnerships with systems integrators and consulting partners, there are very few partners for HCL's CDP product, and none of them are certified. Currently, HCL Unica is certifying new partners for its CDP product.

## Consider HCLSoftware When

The top 3 challenges that HCLSoftware's customers are solving are customer data management, customer journey analytics and orchestration, and improved customer experience. Customers in enterprises — particularly those that already have investments in HCL Unica or HCLSoftware — should consider HCL CDP, especially those in the banking, insurance, manufacturing, retail, and telecommunications industries.

## Insider

After a thorough evaluation of Insider's strategy and capabilities, the company is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Insider is a privately held company founded in 2012 with offices across the globe and headquarters in Singapore. Insider's CDP enables enterprise marketers to connect customer data across channels and systems, predict their future behavior using AI, and deliver individualized experiences to customers.

Quick facts about Insider include:

- **Employees:** 1,100+

- **Industry focus:** Retail, media, automotive, finance, telecom, and travel
- **Cloud:** Cloud native, hybrid, on premises, single tenant, and multitenant
- **Pricing model:** A subscription-based licensing model based on tiers/groups of services and a consumption model that is based on the amount a customer uses the service
- **Primary CDP products:** Insider
- **Partner ecosystem:** A mature and growing community of solution and technology partners
- **Original product GA date:** Released the first iteration in 2014
- **Most recent version and release date:** A continuous integration and continuous delivery (CI/CD) model with weekly releases (therefore, releases and version numbers and data are not available)

## Strengths

- **Portfolio:** Insider offers several products related to its CDP, such as profile management, segmentation, recommendation, and personalization engines and journey orchestration, which target marketers.
- **AI for marketing:** Insider offers a range of AI solutions for marketers, including predictive, generative, and conversational AI. Insider's AI engine — Sirius AI — predicts purchases, churn, and affinities; discovers segments; automatically builds journeys with generative AI; and launches self-driven interactions with its conversational AI.
- **Data management:** Insider continues to enhance its CDP-related data management capabilities, including support for data filtering; data schemas for devices/IoT, events, locations, stores, products, and accounts; data dashboards; and diverse types of data. Adding native support for new data ingestion connectors in the future could augment the company's capabilities.

## Challenges

- **Segmentation and attribution:** Insider lacks segment creation capability through analytics/SQL queries at the household level and segment waterfalling. It also needs to support nonlinear and algorithmic methods for marketing attribution.
- **Language support:** While Insider provides customer support in various languages, it needs to add more language support for product UI, training, and documentation, given its ambition to have a global market presence.
- **Global market presence:** Although Insider has strong roots in Asia/Pacific and Europe, its presence in the North America region has only grown recently.

## Consider Insider When

Consider Insider if you already have investments in Insider’s cross-channel customer experience solutions. The top 3 challenges that Insider customers are solving include 360-degree customer view, customer journey analytics and orchestration, and personalization. Customers in midsize enterprises in Asia/Pacific and Europe should consider Insider a strong choice, especially those in the retail, travel and hospitality, financial solutions, telecom, and media and advertising industries.

## mParticle

After a thorough evaluation of mParticle’s strategy and capabilities, mParticle is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

mParticle is a privately held company founded in 2012, with company headquarters in New York. mParticle’s platform, trusted by prominent consumer brands, is designed to meet the needs of multichannel marketers by providing a Customer Data Infrastructure integrated with an AI-powered Customer Decisioning Engine. With composable real-time architecture, mParticle supports modular configuration, flexible pricing, and interoperability with any data store.

mParticle’s identity resolution service, IDSync, ensures accurate and comprehensive customer profiles, enhancing targeting and engagement across multiple channels. The AI-powered Cortex engine provides predictive analytics and segmentation tools, allowing marketers to anticipate customer behavior and personalize experiences effectively.

Quick facts about mParticle include:

- **Employees:** 231 (estimated)
- **Industry focus:** Financial services, QSR and dining, media and telecommunications, travel and hospitality, and retail
- **Cloud:** Single tenant, multitenant, and hybrid
- **Pricing model:** Consumption based (event volume and retention) and subscription based (monthly tracked users)
- **Primary CDP products:** Real-time customer data infrastructure, intelligent audience segmentation, Cortex predictive AI engine, and customer journey analytics
- **Partner ecosystem:** Offers a partner program called mParticle Pathways that helps hundreds of technology partners and systems integrators build and maintain solutions with mParticle

- **Original CDP product GA date:** January 2015
- **Most recent version and release date:** Operates on a continuous release schedule

## Strengths

- **Data integrations:** mParticle continues to master its data ingestion (real time, bidirectional, and event data) management, support for several types of data, on-read/write/in-transit out-of-the-box data schemas, data enrichment, and data transformations to minimize manual integrations.
- **Real-time processing:** mParticle's real-time data connectivity, identity resolution, and data activation capabilities stand out in the analysis. IDSync further enriches the data through deterministic and probabilistic matching techniques, providing accurate customer profiles.
- **Integrated analytics:** mParticle provides a wide range of descriptive and predictive analytics capabilities around marketing campaigns, customer life cycles, channel optimization, and acquisition and retention. The Journey Builder tool has received positive feedback to create and customize intelligent sequences and discover optimal conversion paths.

## Challenges

- **Generative AI:** While mParticle offers predictive AI as part of CDP workflows, the company has not done the same for generative AI, which could be a drawback, as more users of CDP software consider it as a buying criterion. mParticle is experimenting with generative AI capabilities as part of its R&D effort and has plans to bring it to market in 2025.
- **Activation — engagement:** mParticle does not natively support online or digital channels for campaign execution and must rely on third-party engagement systems.
- **Globalization:** The platform UI, documentation, and training are primarily in English, and customer support is available in only two languages, which may limit its adoption in non-English-speaking regions.

## Consider mParticle When

Organizations that are a B2C brand within financial services, QSR and dining, telecommunications, or travel and hospitality with a need for real-time data movement and integrated predictive AI should consider mParticle's CDP solution. The top 3 challenges that mParticle's customers are solving are cookie deprecation, audience insights, and customer journey analytics and orchestration. For the above-mentioned B2C industries, mParticle offers specialized tools (e.g., media software development kits) to enhance customer engagement.

# Optimove

After a thorough evaluation of Optimove's strategy and capabilities, Optimove is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Optimove is a privately held company founded in 2012, and its global headquarters is in New York, New York. Optimove positions its Customer-Led Marketing Platform to ensure that marketing always starts with the customer instead of a campaign or product. Optimove's CDP helps marketing teams increase customer lifetime value by creating and managing large-scale, customer-led journeys. Optimove's journeys leverage AI to surface valuable customer segments, orchestrate self-optimizing journeys, and deliver marketing interactions with the most significant incremental impact possible.

Quick facts about Optimove include:

- **Employees:** 480+
- **Industry focus:** Retail, consumer brands/CPG, gaming, banking and payments, travel and hospitality, entertainment, insurance, and telecom
- **Cloud:** Public
- **Pricing model:** Subscription-based licensing
- **Primary CDP products:** Optimove
- **Partner ecosystem:** An emerging and growing list of CDP partners
- **Original product GA date:** Released the first iteration of Optimove in 2012
- **Most recent version and release date:** Not applicable because it releases on a continuous CI/CD cadence

## Strengths

- **Intelligent orchestration:** Optimove's CDP is integrated for orchestrating and executing campaigns natively and through third-party engagement systems, including broad support for multiple digital and offline channels.
- **Activation — testing and optimization:** Optimove's CDP offers good functionality for the type of tests it can run and its testing capabilities and provides continuous and automated in-flight campaign course correction.
- **Value-driven segments:** Optimove offers basic and advanced segmentation capabilities available in most CDPs targeting B2C users, but it benefits from operating with a value-driven approach by highlighting the future value of the customer or segment; identifying segments with the highest net revenue; and discovering target groups based on likelihood of purchase, among other things.

## Challenges

- **Globalization:** Optimove has acceptable capabilities for multiple language support, country-level sales, and customer support. However, it is less robust when it comes to language support for UI and documentation; however, Optimove's AI chat interface can translate questions or documentation into any language.
- **Data management:** To target complex or innovative marketing use cases in the B2C segment, Optimove needs to add support for advanced capabilities, such as real-time connectors and unstructured data sources.
- **Partnerships:** In the past couple of years, Optimove has invested in building systems integrators, resellers, and digital agency partnerships. The ecosystem of certified CDP partners is less robust to support the company's verticalization and U.S. growth strategies.

## Consider Optimove When

Consider Optimove if you are investing in customer loyalty and retention as a key marketing initiative. The top 3 challenges that Optimove's customers are solving include customer journey orchestration, AI-driven personalization, and customer loyalty. Customers in large enterprises that need global solutions, services, and support should consider Optimove a strong choice, particularly those in the retail, financial services, gaming, travel and hospitality, and consumer brands industries.

## Oracle

After a thorough evaluation of Oracle's strategy and capabilities, Oracle is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Oracle is a public company that was founded in 1977. It is a multinational, global company with headquarters in Austin, TX. The company sells database software and technology, cloud-engineered systems, and enterprise software products. Oracle's CDP product, Unity, is part of its CX suite of applications. It unifies customer data from across the enterprise to build customer profiles so that enterprises can create and activate audiences, generate more conversation-ready opportunities, personalize experiences, and uncover insights. Oracle's Unity CDP has ID resolution frameworks that enable enterprises to create a single view of customers, accounts, households, buying groups, assets, locations, products, and more to serve B2C use cases, including areas beyond marketing in the customer life cycle, such as sales, services, and analytics.

Quick facts about Oracle include:

- **Employees:** 150,000+

- **Industry focus:** Financial services, healthcare, automotive, travel and hospitality, retail, high tech, industrial manufacturing, and ecommerce
- **Cloud:** Single tenant, multitenant, and cloud native
- **Pricing model:** Subscription based
- **Primary CDP products:** Oracle Unity Customer Data Platform
- **Partner ecosystem:** A global community of partners that serve companies across all sizes, industries, and regions
- **Original product GA date:** October 2018
- **Most recent version and release date:** October 24, 2024

## Strengths

- **Unified suite approach:** The company deploys its Oracle Fusion Marketing suite, including Unity CDP, on Oracle Cloud Infrastructure. Because Oracle operates technology at the infrastructure and application layer, customer data can be shared and managed across the Oracle ecosystem. This, combined with B2C industry-specific data models, use case cookbooks, and accelerators, will help teams get up and running faster to deliver identity resolution, content creation, and real-time processing necessary for success.
- **AI/ML workbench:** Oracle Unity includes an intelligence workbench, with 27 native AI models that run against data in the CDP. Enterprises can bring their own models through this workbench. Model outputs are run and refreshed as profile attributes to enable audience segmentation, predictive CX activation, and real-time recommendations.
- **Customer onboarding:** Oracle's onboarding tool offers an easy-to-navigate UI, as well as a use case accelerator app to walk customers through setting up the Unity data model to meet their B2C use case needs. In addition, educational onboarding resources for B2C marketing end users, developers, administrators, and trainers are available in various formats.

## Challenges

- **Advertising integrations:** Oracle Unity CDP has out-of-the-box integrations with ad networks (e.g., LinkedIn) but needs to expand its support for additional destination systems (e.g., DSPs and RMNs) to fulfill more activation and measurement use cases.
- **Not suitable for SMB organizations:** Oracle Unity CDP's product development and GTM strategy are focused on large enterprise B2C use cases. Without the right resources and organizational data maturity, SMB customers may face hurdles adopting enterprise-level software and achieving value quickly.



- **Generative AI and CDP:** By integrating unified profiles available in Oracle Unity CDP with AI models, enterprises can use generative AI capabilities for broader use cases (e.g., copy for emails, landing pages, and subject lines). However, at present, Oracle Unity CDP does not provide LLM-based AI assistant functionality to generate new segments, derive customer insights, and find the right content from knowledge articles and communities. These capabilities are currently on the road map of Oracle.

## Consider Oracle When

Consider Oracle Unity CDP if you already have investments in Oracle's ecosystem, including Oracle Cloud Infrastructure and its CX applications. It is a strong choice for large B2C enterprises requiring high-performance and global services and support, especially those in the retail, travel and hospitality, banking and payments, ecommerce, and healthcare provider industries. Oracle Unity's CDP is suitable for diverse B2C use cases including customer acquisition and retention, data management, and journey analytics and orchestration.

## Redpoint Global

After a thorough evaluation of Redpoint Global's strategy and capabilities, Redpoint Global is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Redpoint Global is a privately held company that was founded in 2006. Redpoint Global has offices in the United States, the United Kingdom, and the Philippines, with its headquarters in Wellesley, Massachusetts. Redpoint Global's CDP product, Redpoint CDP, brings together ingestion, hygiene, identity resolution, segmentation, activation, and insights. Redpoint CDP uses real-time decisioning analytics to drive personalized messaging based on each customer's individual interactions. Redpoint CDP enables customer data management for a variety of user roles in functions such as marketing, data and IT, martech, and loyalty. For marketing audiences, Redpoint CDP has an opportunity to improve its user interface.

Quick facts about Redpoint Global include:

- **Employees:** 180 (estimated)
- **Industry focus:** Retail and CPG, media, healthcare payers, healthcare providers, financial services, travel and hospitality, and telecommunications
- **Cloud:** Cloud native, hybrid, on premises, single tenant and multitenant; supports deployment in Microsoft Azure, Snowflake, AWS, GCP, and more
- **Pricing model:** Subscription pricing model based on records under management or consumption

- **Primary CDP products:** Redpoint CDP
- **Partner ecosystem:** More than 26 active system implementation partners

## Strengths

- **CDP and deployment options:** Redpoint CDP provides flexibility with broad deployment support in Data Cloud, on premises, or Redpoint Cloud (SaaS). It is also deployable with major cloud hosting providers. Redpoint CDP supports composability by integrating into data warehouses in multiple ways, executes queries for data stored in more than one place, and supports a hybrid approach.
- **Getting Data Right:** Redpoint CDP brings strong credentials to data quality, data observability, and identity resolution with schemas, profiling, cleansing, transforming, and matching customer and related data (e.g., product/service data, devices, and locations/sites) for CX use cases.
- **Analytics — Segmentation:** Redpoint CDP allows marketers, analysts, and data scientists to create segments using AI, APIs, visual interfaces, and analytics/SQL queries for B2C and B2B use cases. A variety of campaigns, journeys, and marketing analytics augments segmentation.

## Challenges

- **Generative AI:** Redpoint CDP has a natural language-based capability to create segments and basic selection rules for journey orchestration. Because buyers are evaluating generative AI capabilities, Redpoint needs to innovate rapidly or risk falling behind. The data quality and data observability capabilities will help Redpoint incorporate AI innovations with trust.
- **Globalization:** Lack of customer support, training, documentation, and product user interface beyond the English language will hamper the company's plans for expansion into regional markets, whether direct or through partner networks.
- **Future GTM expansion:** Redpoint Global did not identify planned new use cases, new targeted industries, or regional or country markets to enter in the next 12-month period. However, Redpoint Global continues to extend its current go-to-market initiatives through partners, expand into midmarket segments and subvertical industries, and address customer demand for composable CDP capabilities.

## Consider Redpoint Global When

Consider Redpoint Global if you are looking for a CDP solution that prioritizes high-quality customer data, cloud deployment flexibility, and identity resolution requirements. The top challenges Redpoint Global customers are solving are improving customer experience, building a clean data foundation, creating a 360-degree customer view, supporting data activation in paid/owned media, and enabling B2C hyper-

personalization. Customers in large enterprises that need CDP solutions, services, and support should consider Redpoint Global a strong choice, especially those in the retail, healthcare, banking and payments, travel and hospitality, telecommunications, and media and advertising industries.

## Salesforce

After a thorough evaluation of Salesforce's strategy and capabilities, Salesforce is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Salesforce is a global provider of customer relationship management (CRM) with headquarters in San Francisco, California. Founded in 1999, Salesforce enables companies to digitally transform around their customers by harnessing the power of automation, AI, and real-time data. Data Cloud is Salesforce's market offering for CDP. Data Cloud integrates with the Salesforce Platform and has AI/generative AI embedded within. With Data Cloud, organizations can personalize customer experiences and real-time analytics across marketing, sales, services, commerce, and more for B2C customers.

Data Cloud offers 200+ out-of-the-box connectors, and its Zero Copy innovation allows companies to access data across all systems and touch points and virtualize and act on data from data lakes without movement. It unifies disconnected structured and unstructured data to understand customer behaviors and create AI models. Data Cloud's semantics layer unifies AI and business intelligence (BI) to generate insights and make them actionable across all business applications, and its Trust Layer makes generative AI enterprise ready. Data Cloud provides unified customer data to Agentforce, enabling generative AI agents to operate with context and automate manual or repetitive tasks, delivering agentic AI experiences.

Quick facts about Salesforce include:

- **Employees:** 72,000+
- **Industry focus:** Retail, consumer brands/CPG, banking, financial services, insurance, manufacturing and automotive, health and life sciences, high tech, professional services, energy and utilities, and communications and media
- **Cloud:** Cloud native; hosted on Hyperforce, Salesforce's public cloud infrastructure that runs on Amazon Web Services
- **Pricing model:** Consumption based
- **Primary CDP products:** Data Cloud

- **Partner ecosystem:** A large, global, and active ecosystem of partners ranging from implementation partners to strategic partners (e.g., Zero Copy Partner Network)
- **Original product GA date:** October 2020
- **Most recent version and release date:** Salesforce Data Cloud operates on a CI/CD model

## Strengths

- **Data cloud momentum:** The company built Salesforce Data Cloud on a common metadata layer and fully integrated it into the Salesforce Platform. By augmenting it with Zero Copy integration, the unified data from Data Cloud can flow into Salesforce applications based on set governance and security policies, giving teams a 360-degree view of the customer for AI-driven segmentation, acquisition, and retention and omni-channel engagement.
- **Artificial intelligence:** Data Cloud includes predictive AI and generative AI models to drive a range of human- and agent-led decisions for B2C firms. Data Cloud ingests or federates unstructured data and applies advanced chunking, summarization, embedding, and multiform indexing for AI models. It has a built-in vector database and delivers hybrid search and RAG to power querying, retrieval, and generation.
- **Data governance:** Salesforce Data Cloud excels in its support for on-read/on-write data schemas for various industries and its B2C-specific attributes and data enrichment with third-party providers. To meet privacy, security, and trust requirements, Data Cloud added new policy-based governance enhancements, AI-based tagging and classification, secure and private connections to data warehouses, and customer-managed keys to ensure data is encrypted while at rest.

## Challenges

- **Specialized data connectivity:** Data Cloud provides 200+ out-of-the-box data ingestion connectors to various sources. However, only a limited set of connectors supports real-time processing or bidirectional processing to/from the CDP and the data sources.
- **Activation channels:** While Data Cloud includes an extensive set of activation connectors for advertising destination systems (e.g., DSPs and RMNs), it needs to expand support for other destination systems outside the Salesforce ecosystem, such as marketing cloud/email service providers, mobile apps/messaging, survey/VOC apps, and support/call center/IVR systems.
- **Compliance management:** Data Cloud currently does not support personally identifiable information (PII) identification, PII redaction, data labeling, and data

masking, which are some of the essential capabilities needed to establish data security and customer trust. Most of these capabilities are in active beta and will be generally available in the near term.

## Consider Salesforce When

Consider Salesforce if you already (or plan to) have significant investments in Salesforce's marketing, sales, service, and Agentforce solutions. It is suitable for midsize and large B2C enterprises with extensive data processing ecosystems, advanced AI and machine learning, unified customer activation, and governance and privacy requirements for global operations. The three main challenges Salesforce's customers are solving are customer data management, establishing a 360-degree customer view, and improving customer experience. Customers in B2C enterprises that need global solutions, services, and support should consider Salesforce a strong choice, especially those in the retail, banking and payments, consumer brands/CPG, and travel and hospitality industries.

## SAP

After a thorough evaluation of SAP's strategy and capabilities, SAP is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

SAP is a global provider of enterprise applications and business AI spanning finance, procurement, HR, supply chain, and customer experience. In the context of CX and cloud enterprise resource planning (ERP), SAP offers the SAP Customer Data Platform to customers. It unifies and enriches customer data from various sources to create customer profiles and orchestrate customer engagements based on real-time insights for B2C use cases. SAP's CDP offering relies on SAP's expertise in data management and analytics to deliver personalized customer experiences across channels and drive effective campaigns based on Customer 360 insights. SAP's CDP offering brings front-office/customer-facing and back-office/operational data together to create a holistic view of the customer's journey and business operations to enable informed decision-making and improve customer experience.

Quick facts about SAP include:

- **Employees:** 107,000
- **Industry focus:** Retail, consumer products, utilities, automotive, and media
- **Cloud:** Multitenant
- **Pricing model:** Subscription based
- **Primary CDP products:** SAP Custom Data Platform
- **Partner ecosystem:** Accenture, Netconomy, Valantic, NTT Data, and Amiconsult

- **Original product GA date:** November 2020
- **Most recent version and release date:** Continuous releases; What's New for SAP Customer Data Platform | SAP Help Portal

## Strengths

- **CX and cloud ERP integration:** SAP CDP integrates with other SAP solutions (e.g., CRM, ERP, and ecommerce) to create complete customer profiles and ensure unified data flows across various business functions. It enhances SAP CDP's appeal to enterprises that have invested in other SAP products and ensures consistent customer data and insights for pursuing B2C use cases.
- **Machine learning and predictive analytics:** SAP CDP leverages prebuilt and custom AI models and supervised machine learning techniques to understand customer behavior, churn rates, purchase propensities, and lifetime value.
- **Industry expertise:** Industry-specific accelerators and abstraction layer augment SAP CDP to incorporate data models and journeys for key B2C verticals such as retail, CPG, automotive, and energy and utilities to accelerate deployment and value.

## Challenges

- **Identity resolution:** SAP CDP provides identity resolution capabilities through native integration with SAP Customer Identity and Access Management. However, it lacks integrations with external identity providers for a complete customer view, client- and server-side identity resolution features, and probabilistic, device ID, or machine learning-based techniques.
- **Composability:** To further reduce data movement between SAP CDP and a data warehouse, SAP CDP integrates with SAP Datasphere using zero-copy SQL on data views. SAP needs to add native integration with cloud data warehouses and support zero-copy reverse ETL or data sharing/sync methods to activate customer data.
- **Generative AI:** SAP CDP's generative AI assistant capabilities are limited to content personalization and optimizing message timing and branching options but require SAP Emarsys. SAP's road map calls for using generative AI for suggesting schemas, segments, and look-a-like audiences and expanding SAP Joule's capabilities within CDP for copilot tasks.

## Consider SAP When

B2C organizations should consider SAP CDP if they require data management across front-office and back-office applications covering multiple customer touch points, real-time profile creation and updates, and predictive analytics. Customers, particularly in retail, CPG, automotive, energy and utilities, and media and entertainment industries,

are ideal for SAP CDP. The top 3 customer challenges that SAP solves are identify resolution, cookie deprecation, and customer data management.

## SAS

After a thorough evaluation of SAS' strategy and capabilities, SAS is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

SAS is a privately held multinational analytics software company based in Cary, North Carolina. SAS develops and markets a suite of customer engagement software, which helps collect, manage, analyze, orchestrate, and report on customer data to aid in analytical marketing and business decision-making. SAS has embedded its CDP capabilities in the SAS Customer Intelligence 360 (SAS CI 360) solution suite. These embedded capabilities offer a real-time omni-channel marketing solution with embedded AI and machine learning suitable for B2C industry verticals. SAS CDP can be augmented with SAS Event Stream Processing, and SAS Intelligent Decisioning can augment SAS CDP for customers that desire real-time analytics and decisions on high-volume throughput data in motion.

Quick facts about SAS include:

- **Employees:** 12,000
- **Industry focus:** Retail, banking, telecom and media, insurance, education, healthcare, life sciences, manufacturing, public sector, and utilities
- **Cloud:** Multitenant, cloud native, and hybrid
- **Pricing model:** Consumption-based (number of profiles, sent messages, and events)
- **Primary CDP products:** SAS CI 360
- **Partner ecosystem:** Has a global community of partners that support SAS CI 360 across all sizes, industries, and regions
- **Original product GA date:** April 2016
- **Most recent version and release date:** November 2024

## Strengths

- **Analytics and AI/ML:** SAS CI 360 provides embedded AI capabilities, including natural language processing (NLP); supervised, semi-supervised, and unsupervised ML; reinforcement learning; neural networks; image analysis; and decision trees. Besides supporting bringing your own AI model, SAS also offers campaign, journey, life cycle, engagement, attribution, and other broad-spectrum customer analytics capabilities for martech staff.



- **Analytics segmentation:** SAS CI 360 can create segments based on corporate accounts, hierarchies, or households using AI-based discovery, APIs, visual UI, or SQL/analytic queries. The solution can update segments in real time, hourly, or daily and offers support for advanced features, such as splitting, ranking, waterfalling, and multientity segments.
- **Data management:** The CDP capabilities of SAS CI 360 support data quality functions such as data profiling and assessment, data parsing, data cleansing and normalization, geolocation enrichment, and data lineage and governance. SAS' strength here could be further augmented with native support for additional industry-specific data schemas (currently only available for retail).
- **Real-time analytics-driven enterprise decisioning:** SAS CI 360 incorporates AI, ML, and business rules into the customer journey workflow, enabling complex decisions across multiple departments, including marketing, sales, service, risk, and fraud.

## Challenges

- **Compliance and consent:** SAS CI 360 does not provide consent management and privacy, and its security tooling and certifications are less robust.
- **Data ingestion:** While SAS offers real-time and bidirectional support, SAS CI 360 offers a limited set of connectors for data ingestion purposes.
- **Complexity:** Advanced features (e.g., complex journey building and audience/segment creation) in SAS CDP require specific skills to implement and manage. In addition, the visual UI, while comprehensive, could be more end-user-friendly. The road map calls for an overhaul of SAS CI 360. Direct and real-time journey UX and new generative AI capabilities will help improve user engagement.

## Consider SAS When

Consider SAS when your marketing needs include unified access to customer and digital data sources in a hybrid fashion, embedded analytics/AI, and for those who need to incorporate advanced business rules and predictive analytics for real-time responses to customer actions and behaviors. Key challenges SAS' customers are solving include improving customer journey analytics and orchestration, audience building and insights, and customer data management. Enterprise B2C customers looking for global solutions, services, and support should consider SAS a strong choice, especially those in the financial services, retail, insurance, travel and hospitality, and telecom industries.

# Tealium

After a thorough evaluation of Tealium's strategy and capabilities, Tealium is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Tealium is a privately owned, United States–headquartered company founded in 2008 in San Diego, California. Tealium positions, markets, and sells the Customer Data Hub, which contains product modules for customer event data collection and delivery, customer profiles and segmentation, data storage and analysis, and ML-driven propensity scoring for B2C use cases. Tealium AudienceStream, the customer profile and segmentation solution, comes with patented visitor stitching technology. Tealium's solutions are modular to fit into any data management ecosystem, giving organizations the flexibility to tune their CDP as per their business needs. In 2024, Tealium for AI was launched to create AI-ready data by collecting, labeling, and preparing data with consent with built-in features such as filtering, obfuscation, and auditability.

Quick facts about Tealium include:

- **Employees:** 600 (estimated)
- **Industry focus:** Financial services, healthcare, pharmaceuticals, retail, manufacturing, sports and entertainment, and travel and hospitality
- **Cloud:** Single tenant, cloud native, hybrid, and Health Insurance and Portability and Accountability Act (HIPAA) compliant multitenant environment
- **Pricing model:** Perpetual based, subscription based, and consumption
- **Primary CDP products:** Tealium Customer Data Platform Suite
- **CDP GTM partners:** A mature and growing community of implementation partners
- **Original CDP product GA date:** September 2013
- **Most recent version and release date:** Operates on a continuous release cycle with no version numbers

## Strengths

- **Data schemas and data ingestion:** Tealium CDP offers data schemas and attribute sets for several industries, including schemas that capture details about required B2C data entities (e.g., customers, stores, devices, events, and locations). Tealium CDP also shines with the availability of 1,300 data and activation connectors that it built natively through a partner ecosystem. It has the flexibility to build new connectors using APIs/webhooks.
- **Campaign activation:** Tealium CDP brings a broad set of campaign execution capabilities in terms of native and third-party engagement systems for

campaigns and segments through online and offline channels and support for multiple destination systems. Tealium can add more benefits by adding support for email, web chat, or SMS channels.

- **Compliance:** Tealium strongly focuses on privacy and compliance capabilities (e.g., labeling, masking, and redaction), in-built consumer consent management, and multiple regulatory, privacy, and security tools and certifications.

## Challenges

- **Identity resolution:** Tealium has capabilities for rules-based and deterministic techniques for reliable identity resolution, especially in regulated industries. However, it does not natively provide probabilistic, ML-based methods for resolving customer IDs, which is necessary to support some of the B2C use cases. Tealium does have partnerships with identity resolution providers to offer probabilistic techniques.
- **Artificial intelligence — machine learning:** Tealium has limited machine learning capabilities for predicting the likelihood of customers to achieve goals and defining segments. Instead, Tealium's strategy is focused on letting Tealium CDP serve as a source of AI-ready data for AI/ML platforms customers might already have in place. Tealium does not offer generative AI-based AI assistants, but it has road map plans to release it for certain CDP-related tasks in the near future.
- **Composability — data sharing and query federation:** From a cloud data warehouse integration standpoint, Tealium does not support data sharing and query federation methods. Tealium does support bidirectional batch and bidirectional real-time streaming connectivity with cloud data warehouses.

## Consider Tealium When

B2C organizations should consider Tealium when they are looking for a standalone CDP with data management, activation, and compliance capabilities optimized for growth teams in marketing and technical operations. Tealium's customers are solving challenges such as improving personalization, granular B2C segmentation, and audience insights. Enterprise customers looking for support and services in EMEA, North America, and Asia/Pacific countries should consider Tealium a strong choice, particularly those in the retail, financial services, healthcare, life science, and entertainment industries.

## Treasure Data

After a thorough evaluation of Treasure Data's strategy and capabilities, Treasure Data is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Treasure Data is a privately held company founded in 2011 with headquarters in Mountain View, California. The Treasure Data CDP unifies customer data across silos at scale and includes a comprehensive connector network. Treasure Data has enterprise-level safeguards to ensure governance, privacy, and security for data processing and management.

Treasure Data's CDP provides a data-first foundation and combines batch and real-time data at the profile level all in one journey orchestration interface for B2C customers. Treasure Data leverages AI to profile role-based copilots based on an LLM framework and uses machine learning for predictions and next-best recommendations. Since its inception, Treasure Data has included a large library of prebuilt connectors and a schema-flexible approach that allows customers to ingest all types of data.

Quick facts about Treasure Data include:

- **Employees:** 500 (estimated)
- **Industry focus:** Retail, CPG, automotive, media and entertainment, life sciences, financial services, and technology
- **Cloud:** Multitenant and private connect; AWS as primary cloud-hosting provider
- **Pricing model:** Subscription based
- **Primary CDP products:** Treasure Data Customer Data Platform, CDP for Service, and CDP for Sales
- **CDP GTM partners:** An emerging and growing list of strategic, technology, and implementation partners
- **Original CDP product GA date:** March 2017
- **Most recent version and release date:** August 2024 (an agile release cycle that publishes continuously)

## Strengths

- **Identity resolution:** Treasure Data's CDP uses several techniques to maintain related identities, such as deterministic, probabilistic, configurable/rules-based, device ID stitching, and machine learning-based techniques. The CDP can maintain identities by region/location, brand, household, account hierarchy, and device and resolve them in batches or in real time.
- **Cross-functional CDP use cases:** Treasure Data openly highlighted and demonstrated how to leverage unified customer data, profiles, and insights for nonmarketing use cases in sales and customer service departments and for helping enterprises streamline decisions to augment the customer experience.
- **Artificial intelligence:** Treasure Data offers either prebuilt machine learning models or bring-your-own models for marketing decisions around segmentation,

personalization, and propensities built on top of the data foundation layer. The company recently introduced Marketing Copilot to create and edit audience segments and campaigns and analyze performance insights with a generative AI chat interface.

## Challenges

- **Globalization:** Treasure Data's CDP provides localized sales and customer support in a few countries, but it offers less language support, especially for product UI, documentation, and training. Treasure Data's Marketing Copilot chat interface can translate questions and responses in multiple languages.
- **Activation — engagement:** Treasure Data cannot execute campaigns natively in digital channels directly from within its CDP. Instead, it takes a system-agnostic approach to campaign activation and will work with customers' existing digital and online channels (e.g., web push/chat, mobile push/chat, SMS, and in-app).
- **Usability and UI improvements:** Treasure Data CDP user interface is built for both business and technical personas. While it is user-friendly for technical users, there is room for UI improvement for marketing/business users to do segment design and visualizations, apply new and nested filters, and generate insights. The release of Marketing Copilot will let marketers use a chat interface to build and activate audiences in an intuitive manner.

## Consider Treasure Data When

B2C enterprises often prefer Treasure Data's CDP solution if they are interested in journey orchestration, identity resolution, and predictive AI and machine learning capabilities. In addition, B2C firms should consider Treasure Data if one of the top challenges they are trying to solve is improving CX, customer acquisition and personalization, and data activation in paid/owned media. B2C enterprises should consider Treasure Data a strong choice, particularly if they are looking for marketing, sales, and service use cases in APAC, North America, and EMEA and in the consumer brands/CPG, automotive, retail, banking and payments, and travel and hospitality industries.

## Twilio

After a thorough evaluation of Twilio's strategy and capabilities, Twilio is positioned in the Leaders category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Twilio is a public, multinational company founded in 2008 with headquarters in San Francisco, California. In 2020, Twilio acquired Segment to reimagine customer engagement with a solution that combines its advanced communications capabilities with rich, contextual data. In 2024, Twilio performed an operational review of the

Segment CDP's business that reaffirmed its plan to continue investing in Segment as a standalone CDP, natively embedding Segment across its communications platform-as-a-service (CPaaS) communication solution and building momentum for predictive and generative AI.

Twilio Segment unifies customer touch points across all channels into a real-time, persistent customer profile that is uniquely enhanced with communications channel data. Twilio Segment CDP includes data collection, data governance, identity resolution, DW interoperability, predictive and generative AI, data observability, campaign metrics, and journey orchestration capabilities. Twilio Segment has 150+ recipes available to enable industry-specific use cases along with templates for common B2C use cases. Twilio recently announced Unified Profiles and Agent Copilot within Twilio's CPaaS solution to augment customer interactions across communication channels with personalized, high-quality data.

Quick facts about Twilio include:

- **Employees:** 5,500+
- **Industry focus:** Information technology, financial services and insurance, consumer brands, professional services, healthcare, and other industries
- **Cloud:** Cloud native
- **Pricing model:** Subscription-based licensing model
- **Primary CDP Products:** Twilio Segment
- **Partner ecosystem:** An extensive global partner community made up of more than 1,450 partners, including large SIs, agencies, and regional consulting firms
- **Original product GA date:** September 2011
- **Most recent version and release date:** Continual delivery model

## Strengths

- **AI innovation:** Twilio segment CDP includes predictive AI models to analyze customer behaviors for likelihood to purchase, next best offer, churn, personalization, and so forth, and the models can be activated for target set of audience or segment. AI also powers automated data mapping, event tracking, and custom source or destination integration to simplify the management and utilization of data within Twilio Segment.
- **Marketing activation:** Twilio Segment CDP users can activate audiences natively or through third-party systems to enable real-time actions across channels based on journey data. External activation occurs using pre-built integrations with 12 destination categories, including AdTech, martech, mobile, social, survey, and support (among others), and support for offline channels.

- **Data management:** Twilio Segment CDP offers an exhaustive list of native (including real-time and bidirectional) data ingestion connectors, on-read/on-write data schemas for B2C data entities and multiple industry verticals via the Protocols feature, support for unstructured data and data dashboards for B2C brands to build a customer data foundation.
- **Unified profiles:** Twilio Segment brings together customer data, communications data (e.g., email, voice, SMS), and data from other external sources. The communications data offers additional contextual insights into customer preferences and intent for B2C real-time personalization and customer service use cases.

## Challenges

- **Attribution:** Twilio Segment does not provide extensive attribution calculations within the CDP but instead provides access to the data so customers can assess attribution in preferred external BI solutions or other tools. While this offers extensible options, IDC believes that there are benefits to including this natively within the CDP.
- **Localization:** While Segment has customers in over 100 countries and multilingual sales and support staff, its product, training, and documentation are only available in English.
- **Probabilistic identity resolution:** Twilio Segment CDP does not currently support probabilistic and machine learning-based techniques to resolve identities. The road map calls for adding probabilistic and AI-powered identity resolution in early 2025, which will help to manage and augment B2C customer profiles.
- **UI presentation:** While Twilio Segment CDP offers a traditional drag-and-drop and role-based user interface, it lacks the ability to offer and customize card/tile interfaces, visualizations, guided analytics, and natural language searches.

## Consider Twilio When

Consider Twilio Segment if your enterprise is interested in combining CDP data with its CPaaS customer communication solution to support marketing and CX use cases. Integrating Twilio Segment with Twilio CPaaS offers enterprises access to CDP and customer interaction data sets to improve CX. The top challenges that Twilio Segment customers are solving include a 360-degree customer view, cookie deprecation, and consumer privacy and personalization. B2C customers in midsize and large enterprises in global markets should consider Twilio, especially those in the retail, CPG, banking and payments, high-tech, and media and entertainment industries.



## Zeta Global

After a thorough evaluation of Zeta Global's strategy and capabilities, Zeta Global is positioned in the Major Players category in the 2024–2025 IDC MarketScape for worldwide customer data platforms focused on B2C users.

Zeta Global was founded in 2007 and became a public company in 2021. Zeta Global has offices on four continents, over 1,900 employees globally, and a diverse set of clients across a wide range of verticals, including retail, financial services, insurance, travel and hospitality, telecommunications, and automotive. The Zeta Marketing Platform (ZMP) provides an integrated (CDP, ESP, and DSP) solution that messages across email, website, mobile, social, display, video, connected TV, digital out-of-home advertising, direct mail, and most other channels. Zeta Global built its products and solutions on a foundation of data management capabilities, and they include highly differentiated proprietary Zeta Data Cloud assets.

Zeta's CDP deliverables are outcome-focused to enable enterprises to acquire, grow, and retain consumer relationships efficiently and effectively. On October 21, 2024, Zeta Global completed acquisition of LiveIntent. It will add LiveIntent's identity graph to Zeta Data Cloud, positioning Zeta Global to introduce Publisher Cloud and enhance its mobile and retail media capabilities to manage cross-channel campaigns more effectively.

Quick facts about Zeta Global include:

- **Employees:** 1,900
- **Industry focus:** B2C marketing technology
- **Cloud:** AWS
- **Pricing model:** ZMP platform fee plus usage
- **Primary CDP products:** Zeta Marketing Platform
- **Partner ecosystem:** Has 33 implementation partners (SIs, ISVs, etc.) worldwide, strategic partners such as AWS and Snowflake, and 170 prebuilt integrations ([zetaglobal.com/integrations](https://zetaglobal.com/integrations))
- **Original product GA date:** Released the first iteration of the ZMP in 2014
- **Most recent version and release date:** A continuous development and release model (quantifiable releases or versions not available)

## Strengths

- **Data management:** ZMP has 750 million permission-based, proprietary data sets, providing the unique mapping to real individuals that is necessary for identity resolution. ZMP offers strong capabilities to import, merge, and enrich

data from various sources and performs data normalization, hygiene, and unification for data integrity.

- **AI:** ZMP offers a broad set of AI models for audience discovery, next-best offers, customer scoring, and predictive metrics, among others. It provides generative-AI-related capabilities for content generation, identifies and adjusts segments using AI assistant, gives recommendations for audience building and campaign creation, and can build AI agents to perform specific tasks (e.g., onboard data and write copy).
- **Campaign execution and optimization:** ZMP's Experience Builder enables users to integrate sequences across owned and paid channels and target audiences across first- and third-party data sources and on any API-enabled channel of choice. Home-grown solutions and internal channels such as customer service and call centers are often informed by ZMP data. ZMP can also execute campaigns for native channels directly from CDP or third-party systems.

## Challenges

- **Data ingestion and channel activation connectors:** Zeta Global's CDP is behind in terms of its support for different types of native connectors for data ingestion purposes. Bolstering native connectivity to new activation channels (e.g., RMNs, and marketing cloud/ESPs) will strengthen campaign execution and optimization.
- **Partnerships:** In terms of the number of implementation partners and systems integrators, including CDP-certified consulting partners, Zeta Global is behind. To achieve its desired growth, Zeta Global's partnership program, while growing, needs to build and expand with a focus on CDP.
- **Globalization:** While Zeta Global is having success with its presence in North America market and demand for its CDP solution sold in conjunction with other Zeta products, it needs a stronger go-to-market focus for also pursuing standalone CDP opportunities. In addition, Zeta Global needs to bolster its training, documentation, product UI, and customer support with additional languages and localized assets to expand its global footprint and acquire new international clients.

## Consider Zeta Global When

Marketing and advertising teams in B2C multibrand enterprises often prefer Zeta Global's CDP solution. ZMP serves as an AI-powered marketing cloud that enables enterprises and agencies to build CDP for campaign and ad activations. B2C brands that are interested in Zeta Global's proprietary data and identity graphs, automated data ingestion, insight generation and activation, and model-based optimization are suitable for Zeta Global's CDP. The top 3 CDP-related challenges that Zeta Global's

customers are solving include customer data management, CX improvement, and identification of resolution/universal identifiers. Enterprises based primarily in North America — particularly those interested in CDP, media activation, and omni-channel messaging solutions — should consider Zeta Global, especially those in the retail, telecom, banking and payments, professional services, and travel and hospitality industries.

## APPENDIX

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### 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 represents 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 in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

Customer data platforms (CDPs) applications software provides a unified customer data profile and repository into which all batch, real-time, streaming, and other forms of structured and unstructured data are aggregated together and is constantly updated to create and manage segments based on various attributes. B2C brands use these audience segments in all customer-facing functions, subject to proper privacy and consent, along with AI and GenAI to drive real-time personalized engagements and improve customer experience, loyalty, and trust.

CDPs provide the following functionality, which the IDC MarketScape evaluates:

- Ingest customer data from source repositories using native connectors and store it persistently for activation through AI and analytics.
- Manage data from zero-, first-, second-, and/or third-party sources to create a single, comprehensive, and unified customer profile.
- Perform ETL/ELT on multiple data formats (including batch, real-time, streaming, structured, and unstructured) and provide a data model to represent which attributes and dimensions the profile includes.
- Make on-read and on-write data schemas available for customers, accounts, products, and stores and enable real-time enrichment of profiles based on durable third-party data.
- Perform data cleaning, quality, and hygiene functions (e.g., deduplication, redaction, completeness, freshness, observability, and governance).
- Resolve customer identities across sources, devices, and channels in batch or real time using different techniques.
- Track and identify anonymous visits using identity resolution (natively or with partners) or supporting activation through data clean rooms.
- Create, update, and manage segments or audiences using rules-based, predictive AI, and GenAI methods.
- Utilize data stored in cloud data warehouses and similar repositories through zero-copy/reverse ETL, data sharing, query federation, and related techniques to minimize data movement.
- Ensure compliance, privacy, and security of tooling and certifications; collect, consolidate, and synchronize end-user consent choices and preferences; and protect and audit user-level data access and sharing as per regulations.
- Offer AI, ML, and NLP capabilities (natively or import and manage external AI/ML models within the CDP) and activate the results of AI models to engagement channel tools or to internal applications using APIs.

- Augment CDPs with GenAI- and NLP-based AI assistants, copilots, or agents to create customer journeys, segment audiences, analyze customer insights, generate and personalize content, and set up trigger-based actions.
- Offer analytics, reporting, and dashboards for campaigns, segmentation, attribution, optimization, customer/audience measurements, flexible tagging schemas, personas, and personalization capabilities.
- Share segments for activation to third-party engagement systems for messaging, campaigns, and advertising and/or activate natively to channels and systems directly from the CDP.
- Offer B2C capabilities (e.g., real-time enrichment of profiles, integration with third-party durable data, and collaboration between advertisers and publishers) for users and top B2C industry-specific use cases.

## **Strategies and Capabilities Criteria**

To assess vendors, IDC analyzed data across two major axes — strategies and capabilities (see Tables 1 and 2). IDC analysts look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market. In the strategy category, IDC evaluates whether a vendor’s strategy, vision, and road map in various areas are aligned with customer requirements (and spending) over a defined future time period and their business and go-to-market plans.

While capabilities criteria are important, given the maturity of this industry, and the number of participating vendors, the industry is approaching feature parity in many areas. As such, strategies axis elements, along with go-to-market considerations (e.g., innovation, customer service, pricing, road map, delivery, consulting partners, and customer success), were incorporated reflecting their importance in the decision process.

**TABLE 1****Key Strategy Measures for Success: Worldwide Customer Data Platforms Focused on B2C Users**

Strategies Criteria Categories	Definition	Weight (%)
Portfolio	Percentage distribution of CDP revenue by region and functional areas and distribution of annual CDP contracts by different revenue ranges  In addition to the core CDP product, the additional products that companies frequently sell together	16.0
Innovation	Planned R&D funding and investments  Out-of-the-box CDP use cases for top 5 B2C industries  Out-of-the-box CDP use cases for functional departments	18.0
Functionality or offering strategy	Key planned GenAI product enhancements in the next 12 months as part of the road map; marketing/branding GTM approach around GenAI in the context of CDPs and CX  Key planned product enhancements in the next 12 months as part of the road map and new out-of-the-box use cases under consideration for launch in the next 12 months	24.0
Partnering	Number of implementation partners by region and number of active CDP-certified system implementation partners	7.0
Growth	Distribution (%) of CDP revenue from B2C customers  Growth of the company's customer base through geographical, regional, and industry vertical expansion  Overall CDP revenue and head count growth percentage  Distribution (%) of CDP revenue by B2C industries	31.0
Delivery	Different cloud-hosting/infrastructure systems that the company's SaaS/cloud CDP product used	4.0
Total		100.0

Source: IDC, 2024

**TABLE 2**

**Key Capability Measures for Success: Worldwide Customer Data Platforms Focused on B2C Users**

Capabilities Criteria Categories	Definition	Weight (%)
Customer service delivery	<ul style="list-style-type: none"> <li>▪ Support for cloud provisioning models and UI customizations as part of the delivery of CDP software</li> <li>▪ Languages that CDP product UI, documentation, and training support; total number of countries with sales, customer support, and datacenter footprint; and the number of different languages that the vendor offers customer support in</li> </ul>	8.0
Functionality or offering	<ul style="list-style-type: none"> <li>▪ Analytics capabilities (e.g., BI/reporting on marketing metrics, campaign analytics, attribution, and customer life-cycle progression) for marketers and how they can optimize goals (e.g., engagement and cart value)</li> <li>▪ Types of tests, campaign optimization, and testing capabilities (by offer, audience, and single/multiple channels)</li> <li>▪ Mechanisms or ways CDP executes in channels, native or off-line campaign activation, and out-of-the-box integration with destination systems</li> <li>▪ For CDPs targeting B2C customers, identify the top challenges and how they address key requirements (e.g., enable customer prospecting and acquisition, collaborate with consent, offer real-time enrichment of profiles, facilitate relationships between advertisers and publishers, define the scale of profile bands or ranges in their deployment, and list top 5 B2C challenges CDP solved)</li> <li>▪ Compliance framework, tooling, and processes that CDP supports (including certifications, consent management, and data subject inquiries)</li> <li>▪ Number, sources, and types of offered data connectivity capabilities to create unified profiles — including real time, bidirectional, raw/unfiltered; determine the percentage of connectors for vendor's own products versus third-party systems and data filtering options available</li> <li>▪ Provisioning and management of data schemas, including offered out-of-the-box standard set, semantic layer availability, and industry-specific attributes</li> <li>▪ Data quality capabilities in the form of data enrichment sources, data dashboards, and whether crowdsourcing and collaboration options are available to improve data</li> </ul>	79.0



**TABLE 2**

**Key Capability Measures for Success: Worldwide Customer Data Platforms Focused on B2C Users**

Capabilities Criteria Categories	Definition	Weight (%)
	<ul style="list-style-type: none"> <li>▪ Techniques and methods used to resolve identities, including tag management and integration with third-party identity providers</li> <li>▪ AI and GenAI capabilities to drive automation, enhance productivity, and optimize CDP-related tasks, workflows, and processes to achieve various business/marketing goals and outcomes using predictive AI and GenAI models, NLP, and RAG</li> <li>▪ Composable CDP that allows organizations to modularize their approach to collecting, storing, and modeling data, including integrating with different data warehouses (DWs), executing queries in more than one place, and supporting hybrid processing within CDP or DWs</li> <li>▪ Segment creation methods, segment creation sources and criteria, and advanced segmentation capabilities that CDPs provide</li> </ul>	
Customer satisfaction	<ul style="list-style-type: none"> <li>▪ Proof of concepts (POCs) the company offers as part of the buying cycle, including time spent from the request to the delivery of POCs and typical costs to the customer</li> <li>▪ Renewal rate (annual) for CDP software license subscriptions</li> <li>▪ Customer satisfaction evaluation in terms of value delivery, ease of use, overall customer satisfaction, application scalability, upgrade experience, and product road map based on interviews with reference customers</li> </ul>	8.0
Pricing model or structure of product/offering	<ul style="list-style-type: none"> <li>▪ Key pricing drivers and choices with regard to the contract structure, software versus services mix to satisfy customer needs, and pricing and licensing options</li> </ul>	5.0
Total		100.0

Source: IDC, 2024

### Related Research

- *Market Analysis Perspective: Worldwide Customer Data Platforms Applications Software, 2024* (IDC #US52561124, September 2024)
- *Worldwide Customer Data Platform Applications Software Forecast, 2024–2028: The Essential Role of Customer Data in Generative Experiences* (IDC #US52351824, August 2024)
- *Market Trends for CX Tech Buyers, 3Q24* (IDC #US51620824, August 2024)
- *IDC CX Path: Vendor Ratings, 2024* (IDC #US51021724, August 2024)
- *Worldwide Customer Data Platform Applications Software Market Shares, 2023: The Essential Role of Customer Data in Generative Experiences* (IDC #US52351924, June 2024)
- *CDP Market Trends in 2024* (IDC #US51933224, March 2024)
- *Generative and Predictive AI Use Cases for Customer Data Platforms* (IDC #US51932924, March 2024)

### Synopsis

This IDC study represents a vendor assessment of the customer data platforms (CDP) software market for the B2C segment, users, and use cases through the IDC MarketScape model. The assessment discusses both quantitative and qualitative characteristics that provide guidance about CDP software vendors and their product offerings and emphasizes the importance of selecting vendors with proven track records.

This IDC MarketScape report evaluates the functional capabilities and go-to-market considerations of 18 CDP vendors that primarily serve users in marketing technology and operations, data science and analytics, IT and DataOps, and privacy and compliance functions at B2C organizations. The evaluation is based on a comprehensive and rigorous framework that helps buyers define their CDP needs, assess vendors relative to the criteria and one another, and determine an appropriate short list of vendors that may be best suited to their industry, company size, and use case requirements.

“Unified customer data is essential for B2C organizations to understand, assist, and interact with their customers across all touch points,” said Tapan Patel, research director, Customer Data Platform, Intelligence, and Analytics at IDC. “Customer Data Platforms activate high-quality customer data and, when combined with predictive AI and generative AI, deliver personalized and contextual experiences across marketing, customer service, sales, and other functions. CDPs eliminate customer data silos and drive growth through real-time engagements and continuous optimization of customer journeys, campaigns, and content.”

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events 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, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

### Global Headquarters

140 Kendrick Street  
Building B  
Needham, MA 02494  
USA  
508.872.8200  
Twitter: @IDC  
blogs.idc.com  
www.idc.com

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