

Magic Quadrant pour les plateformes de données clients

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Alors que les CDP évoluent au-delà des technologies marketing pour devenir des investissements stratégiques pour les entreprises, les acheteurs doivent évaluer le rapport coût-valeur pour les parties prenantes transverses. Cette étude aide les directeurs marketing à sélectionner les plateformes qui répondent aux besoins technologiques et de données des entreprises, améliorant ainsi les fonctions orientées client et les applications métier en amont.

Définition/Description du marché

Gartner définit les plateformes de données clients (CDP) comme des applications logicielles qui prennent en charge les cas d'usage marketing et d'expérience client en unifiant les données clients d'une entreprise issues du marketing et d'autres canaux. Les CDP optimisent le timing et le ciblage des messages, des offres et des activités d'engagement client, et permettent l'analyse du comportement individuel des clients au fil du temps.

L'objectif d'une plateforme de données clients (CDP) est de centraliser la collecte de données et d'unifier les données clients issues de sources disparates au sein de profils. Les CDP permettent aux analystes et aux ingénieurs de données d'effectuer des tâches de gestion de données qui soutiennent les processus métiers de niveau supérieur, principalement le marketing, mais de plus en plus les fonctions CRM, ainsi que la finance et la gestion des produits. Si les CDP ont été initialement conçues pour répondre aux besoins marketing, l'intérêt des fonctions de gestion de données, de l'informatique et des autres utilisateurs métiers en contact direct avec les clients (par exemple, les ventes, le service et l'assistance) est en hausse. La majorité des groupes d'achat de cette technologie sont principalement composés de fonctions informatiques .

Les CDP orchestrent une variété d'applications métier et de systèmes CRM, permettant aux entreprises d'optimiser et de mieux coordonner l'exécution de la mise sur le marché (par exemple, des actions commerciales unifiées pour le B2B et l'orchestration du parcours client pour le B2C). Si nombre de ces systèmes gèrent également les données clients et les audiences ciblées, leur fonctionnement rend complexe la gouvernance et l'orchestration des données entre les différents canaux et les solutions des fournisseurs concurrents. Les CDP visent à relever ce défi en collectant et en unifiant des données clients disparates dans un emplacement centralisé, les rendant ainsi accessibles aux équipes en contact direct avec les clients tout au long de leur cycle de vie.

La CDP ne remplace pas encore la gestion des données de référence de l'entreprise, mais elle permet de garantir que les données de profil client, les événements transactionnels et les attributs analytiques sont accessibles au marketing et aux autres fonctions en contact avec les clients pour coordonner les interactions. Les CDP régissent le flux bidirectionnel de données entre le front-office et le back-office (par exemple, GTM et R&D/opérations).

Caractéristiques obligatoires

Au minimum, les CDP doivent effectuer :

- **Collecte de données**
 - Ingest (extract) first-party, individual-level customer data from multiple sources and formats, online and offline, in real time and without limits on storage. Data persists as long as needed for processing and is typically left unchanged in its original source. This includes both anonymous and known first-party identifiers, behaviors and attributes.
- **Profile unification**
 - Consolidate profiles at the person level and connect attributes to identities. This may include aggregating customers into a household or account level for B2B or account-based marketing (ABM) use cases.
- **Activation**
 - The ability to send segments, with instructions for activating them, to engagement tools for email campaigns, mobile messaging and advertising, among others.
- **Analytic reporting**

- Performance analysis for various levels of customer data, such as the attribute level, profile level or segment level.

Common Features

Common features include:

- **Segmentation**

- An interface that enables the marketer to create and manage segments or audiences. Basic offerings support rule-based segment creation.
- Analytic support to detect, prioritize and predict optimal responses to significant events affecting a customer relationship.

- **Integrations**

- The ability to connect to and exchange data or instructions with other tools, programs, apps and channels.
- Data interoperability with cloud data warehouses is an emerging and a differentiating feature of CDPs. This includes the ability to retrieve or query data directly from a cloud-based data warehouse and orchestrate data to point solutions.
- Some CDPs are embracing a lakehouse design approach that supports the persistence and retrieval of structured, semistructured and unstructured data in a consolidated and coherent manner. This approach also supports batch, streaming and interactive modes of data processing.

- **Data model management**

- A representation of how customer data is structured and which attributes and dimensions to include in a profile.

- **Privacy**

- The ability to protect and audit user-level data access, mask or other approach to minimize inadvertent data sharing, comply with regulatory requirements, such as General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA), and synchronize individual-level consent flags.

- **Personalization and orchestration**

- The ability to optimize messaging, content, offers and interactions via marketing channels to audience groups defined by multiple attributes and dimensions. This may include out-of-the-box models (e.g., next-best-action capability, channel-agnostic recommendation engines) and content/offer optimization. In advanced offerings, personalization and decision making may be in real time.
- **Consent and preference management**
 - The collection and consolidation of end-user choices and preferences regarding how their personal data should be handled, and synchronizing these choices across marketing systems and channels.
- **Data science workbench**
 - This includes features beyond out-of-the-box predictive models, such as the ability to import and manage machine learning models within the CDP using R or Python.
 - Additionally, CDPs may enable A/B and multivariate tests that monitor and self-optimize the customer experience based on the winning campaign segment.
- **Account-level aggregations**
 - Identity resolution, aided by B2B data enrichment capabilities, accommodates account or organizational aggregations of contacts associated with a specific enterprise, supporting B2B lead management and unified commercial motions with sales.
- **Connections to CX channels and systems**
 - The collection and dissemination of customer attributes and marketing engagements to customer service/support, digital commerce, sales, and other customer engagement technologies.
- **Identity graphs and data clean rooms**
 - Tracking and identifying pseudonymous web visits using partnerships with identity resolution partners (such as Merkle or LiveRamp), or supporting advertising measurement and activation use cases through data clean rooms.

Magic Quadrant



Figure 1: Magic Quadrant for Customer Data Platforms



Vendor Strengths and Cautions

ActionIQ

ActionIQ is a Niche Player in this Magic Quadrant. Its CX Hub’s modules include Audiences, Identity, Journeys and Real-Time. It can create or synchronize customer profile data with multiple data warehouses and supports real-time marketing activation via customer experience systems. Its U.S.-based operations mostly serve B2B customers in high tech and business services, and B2C clients in media, retail and financial services. In 2024, ActionIQ launched several generative AI (GenAI)-enabled capabilities: AI Audience, AI Explainer, AI

Assistant and AI Content. To deepen integration with cloud warehouse partners, it plans enhanced integration via real-time connectors in its HybridCompute architecture.

Uniphore announced plans to acquire ActionIQ in December 2024. ActionIQ met the inclusion criteria for this Magic Quadrant and operated as a separate entity during this evaluation.

Strengths

- **Data warehouse synergy:** ActionIQ supports data warehouse integrations with its HybridCompute architecture, including data sharing and reverse ETL with Snowflake, Amazon RedShift, Databricks, Terradata and Google BigQuery. This feature simplifies data pipeline management and governance, enabling clients to flexibly store or process data between the CDP and integrated data warehouses with minimal latency.
- **Robust proofs of concept (POCs):** ActionIQ's POCs validate the technical functionalities, data integrations and platform usability necessary for a prospect's desired business outcomes over six to 12 weeks. Almost two-thirds of its new clients complete a POC, while its conversion rate from POCs is among the highest of vendors in this research.
- **Data collaboration:** ActionIQ's partnerships support data collaboration in the identity space. ActionIQ's agnostic approach to data clean rooms uses native connectors with vendors and enriched profile attributes via direct partnerships with identity resolution vendors.

Cautions

- **Vision:** ActionIQ's vision requires innovation from cloud data warehouse partners. Its strategy relies on large enterprise clients with mature data warehouses, where marketing and IT teams align. Its ability to leverage warehouse integrations has weakened, as evidenced by shrinking deal sizes. Buyers should determine if this vision aligns with their data strategy and tech roadmap.
- **Portfolio breadth:** Uniphore's acquisition of ActionIQ is premised on enhancing its AI offerings and delivering an agentic AI and CX platform. This is a more diverse focus than a stand-alone CDP product. Buyers should assess how Uniphore will maintain promised feature releases, especially as it relates to its much larger AI offering.
- **Broad go-to-market:** ActionIQ's product demo and new marketing motion for self-serve purchasing by midmarket organizations is a stretch for its current product. Targeting

smaller buyers may exacerbate the impact of weaker product areas noted in this year's evaluation, such as self-serve data configuration and onboarding, query troubleshooting and in-platform analytics.

Adobe

Adobe is a Visionary in this Magic Quadrant. Its Real-Time CDP collects and unifies customer data to activate data and insights within and beyond Adobe's ecosystem. Its global operations serve mostly B2C businesses, with some B2B and hybrid, and customers span a broad set of industries. It released its Federated Audience Composition in 2024 to expand access to data warehouse assets in the CDP without data movement or duplication. Adobe plans to release Real-Time CDP Collaboration, a privacy-centric offering supporting audience discovery and measurement, and plans continued AI advances for data onboarding and support.

Strengths

- **GenAI vision:** Adobe's large Creative Cloud customer base inspires a differentiated vision for future GenAI use cases in CDPs. While in-tool GenAI capabilities today focus on AI assistants, Adobe foresees a longer-term evolution of its CDP to integrate with creative-generation workflows, powered by Firefly, to enable content generation based on unified CDP profiles.
- **Growth:** Real-Time CDP achieved significant customer growth since its inception in 2019. The Adobe Experience Platform native portfolio reported 60% year-over-year growth in subscription revenue as of 2Q24. Adobe's partner ecosystem of consulting firms, SIs and agency service providers supports this momentum.
- **Vertical enablement:** Adobe Real-Time CDP reports a diverse mix of customers across industries. It has out-of-the-box (OOTB) schemas for easier data normalization and faster time-to-value across first-party, data-rich industries, such as retail, financial services, healthcare and hospitality. It also released in-product use-case playbooks for financial services and healthcare.

Cautions

- **Platform packaging:** Adobe Experience Platform portfolio is Adobe's solution for customer experience orchestration, inclusive of the products Real-Time CDP, Adobe Journey Optimizer, and Customer Journey Analytics. Customers purchasing Real-Time

CDP as a stand-alone CDP may also require investing in Adobe Journey Optimizer for deep personalization and orchestration functionality, or Customer Journey Analytics for sophisticated measurement and reporting.

- **Total cost of ownership:** The breadth of Adobe's non-Adobe Experience Platform-native product portfolio (products such as Adobe Analytics, Campaign, Marketo and Target) complicates the CDP adoption roadmap for existing customers and may require additional product modules, time and costs. While Real-Time CDP can integrate with nonnative Adobe Experience Platform products such as Adobe Analytics and Target, customers with advanced use cases will not experience the same time and cost efficiencies as those with native products.
- **Limited set of packaged integrations:** Adobe's total prebuilt integrations library is below average in this research. While customers can utilize self-service SDKs to increase interoperability with third-party systems, this raises the risk of higher costs in professional services or technical support.

Amperity

Amperity is a Niche Player in this Magic Quadrant. Its CDP excels at serving technical and media teams, helping them unify and activate customer data due to its AI-powered identity solution, integrations with ad tech platforms, and media measurement features. Its operations are based in North America, with a presence in Europe and APAC. Its clients are mostly large B2C enterprises. In 2024, Amperity unveiled a new GenAI solution, AmpAI, for data exploration and adopted a consumption-based pricing model with Amps units for flexible billing. It plans to continue developing support for zero-copy data sharing with lakehouses beyond Databricks and Snowflake, while continuing to grow its presence beyond marketing-centric buying groups.

Strengths

- **Tracking and reporting capabilities:** Amperity Benchmarking helps clients see how they stack up against companies of similar size, industry or location. The benchmarking focuses on data integration, partnership connectivity and the success of marketing campaigns to help clients identify opportunities for further success.
- **Media and measurement use-case support:** Amperity extensively supports media activation and campaign measurement use cases. Its AI-powered identity solution was early to market, and its AmpID allows clients to stitch together identity graphs based on

user profiles. Its “Unify all ID keychain” allows customers to manage ID keychains in the CDP, including integrations with Unified ID 2.0. Advertising technology (adtech) providers like The Trade Desk offer activation opportunities that outpace other data specialist CDPs in this market.

- **Growth:** Amperity reported a consistent compound annual growth rate (CAGR), good revenue retention and moderate deal sizes despite market consolidation. Its understanding of buyer needs is key in its approach to closing deals.

Cautions

- **Operations:** Amperity has reduced its workforce each of the past two years. Since 2022, it has had three CEOs and one interim CEO. Amperity has experienced significant growth, but potential buyers should evaluate the consistency of the operational support they require, and will receive, in their engagements.
- **Tech buyer alignment:** Amperity is transitioning the core value proposition of its capability set to be more in alignment with a technical buyer focused on enabling data management. This may leave buyers focused on business outcome use cases without a clear value story to invest against.
- **Data-sharing support:** Amperity supports Databricks for its lakehouse implementations through Amperity Bridge, and Secure Data Sharing with Snowflake. While future integrations with other providers are on the roadmap, its CDP trails the market in support for data sharing.

BlueConic

BlueConic is a Niche Player in this Magic Quadrant. Its marketer-friendly CDP focuses on collecting and unifying first-party data and building robust customer segments via its flexible rule-based and GenAI segment builders and OOTB audience visualizations. Its operations focus on the Americas and Europe, with nearly half of its customer base in Europe. Its clients tend to be midsize and enterprise B2C organizations with a focus on media and retail. Its 2024 acquisition of Jebbit software enables marketers to capture first-party data by creating unique experiences, such as product match quizzes, trivia games and interactive polls. It plans to add zero-copy data sharing with Snowflake and Databricks, and more AI features in the platform UI.

Strengths

- **Audience-building capabilities:** BlueConic differentiates itself by offering a unique method of collecting first-party data through its acquisition of Jebbit, which enables marketers to create interactive experiences like quizzes and trivia games. In addition, its native data clean room enables sharing second-party data in a privacy-compliant way.
- **Market responsiveness:** Customer listening efforts led to key product and roadmap enhancements, in particular, the incorporation of a large language model (LLM) for segment clustering and the strategic shift to add more composable capabilities.
- **European presence:** Nearly half of BlueConic's customer base is in Europe, and more than 40% of employees are Europe-based to provide regional support. Global customers may choose to host two separate tenants for the U.S. and the EU to support local compliance (e.g., the EU's General Data Protection Regulation [GDPR]). BlueConic continues to provide strong in-tool functionality to manage privacy preferences.

Cautions

- **Product offering strategy:** BlueConic's support of data sharing with large, cloud-based data warehouses is lagging other vendors in the market. It does not support real-time data sharing with Microsoft Azure, Google Cloud Platform or Databricks Delta Sharing. While enhancements are on its roadmap for 2025, buyers with a focus on data ecosystems should carefully evaluate how BlueConic's roadmap would align with their integration requirements.
- **Overall viability:** BlueConic's net new customer growth rate (2020-2024) is comparatively slow, among providers evaluated in this research, at a time when the CDP market is experiencing significant growth. CMOs should evaluate current product capabilities, BlueConic's roadmap and its ability to shift to push past market parity and innovate.
- **Vertical focus:** BlueConic has a significant vertical focus on the media/publishing and retail and CPG verticals, both in new deals and in-product functionality, such as industry-specific reference data models. It does not yet have the global partner scale of many other vendors evaluated, and nascency here can make it more difficult to reach prospects in different industries.

mParticle

mParticle is a Niche Player in this Magic Quadrant. Its CDP enables marketers to analyze, activate and govern audience data to support life cycle marketing for B2C brands,

particularly those with a mobile application. It mostly serves customers in North America and Europe in media, consumer products, retail and financial services. Its OOTB customer journey analytics support exploration of customer behavior, and discovery of audience segments and customer attributes. Its Warehouse Sync supports bidirectional data integration and profile enrichment with Snowflake, Google BigQuery and Amazon Redshift. Its roadmap includes expansion of real-time data sharing support beyond Databricks to other warehouse platforms.

Rokt announced merger plans with mParticle in January 2025. mParticle met the inclusion criteria for this Magic Quadrant and operated as a separate entity during this evaluation.

Strengths

- **Total cost of ownership:** mParticle's value-based pricing reflects an understanding of the economics of the modern customer data stack and lakehouse approaches. Event volume is the primary metric of product consumption, and a portion of purchased, unused credits roll over every year. This feature is a differentiator that reduces the risk of a multiyear contract.
- **Data governance:** mParticle's data governance and consent management features support building trusted customer relationships and include the application of consent policies on data collection and egress. Data plans enable automated data filtering to limit or quarantine data on ingestion. The platform supports minimizing the transfer of sensitive customer attributes when activating audiences.
- **GenAI roadmap:** Planned GenAI innovations are spread across analytics, reporting and activation, such as natural language to create audiences, propensity scores and analytics reports. Notably, the natural language transformation builder reduces the need for developers to write code to manipulate data in complex ways.

Cautions

- **Vertical depth:** mParticle's customers are highly concentrated in industry segments, such as quick-service restaurants, retail, and media and entertainment. It offers limited support for healthcare or life sciences. Such buyers should determine whether its 2025 plans for U.S. HIPAA compliance support align with their near-term needs.
- **Support for personalization:** mParticle is not focused on managing offer libraries or content for personalization. Personalization strategies leveraging predictions must be

carefully coordinated with other journey orchestration tools that have their own AI and ML features.

- **Partner network:** mParticle's partner network is narrower than most vendors in this research, and few of its existing partners are deeply experienced in implementing its product. Solution partner and channel strategies are a work in progress, despite continued investments such as its Pathways certification program.

Oracle

Oracle is a Challenger in this Magic Quadrant. Its Unity CDP enables large B2B and B2C enterprises with complex data management needs to deliver unified customer experiences while connecting back-office and commercial business processes to accelerate revenue. Its geographically diverse operations serve enterprises across sectors. AI plans include usability enhancements by user persona, an LLM-based Unity Digital Assistant, a job title normalization model, enhanced opportunity scoring and augmented AI audience segmentation to target white spaces in customer accounts. Other plans include journey orchestration updates, LinkedIn bidirectional integrations and Google Display & Video 360 connectors for phone numbers, MAID and PII match IDs.

Strengths

- **Transparent pricing:** Oracle's pricing is based on total unique profiles stored after ID resolution and total annual sessions across the web or application properties tracked. Unity CDP is built on its own data infrastructure, so Oracle doesn't charge for other factors, such as data ingress and egress, storage, attributes calculated, number of audiences, or queries on the data.
- **Unified commercial experiences:** Oracle recently prioritized investing in accelerating time-to-value for industry end users and partner enablement to deliver integrated back-end and front-end digital and on-premises customer experiences across marketing, sales and service functions. The CDP benefits from Oracle's enterprise data management experience in complex operating environments focused on fiscal management across the customer life cycle.
- **B2B segmentation support:** Unity CDP features Account Profile Explorer, with hierarchical account insights, including industry-specific options such as functional groups, product purchase and usage data, competitive install, and channel engagement frequency. These

features enable active logical B2B buying group segmentation for unified commercial motions across marketing, sales and service.

Cautions

- **Data warehouse support:** Zero-copy capabilities for Amazon Web Services (AWS), Google Cloud Platform and Oracle Autonomous Data Warehouse require Apache Iceberg. Unity CDP offers prebuilt, bidirectional integrations for most major data warehouses. However, OOTB integrations for real-time, bidirectional and federated data sharing are not available for Snowflake and Microsoft Azure.
- **Media network integrations:** While Unity CDP integrates with Meta, Twitter, LinkedIn, Google Display & Video 360 and LiveRamp, native integrations with retail media networks are mostly available through published APIs. Prospective customers should evaluate media plans and available integrations for support, or if additional integration resources will be needed.
- **Limited personalization support:** Contacts can be added to segments in Unity CDP using propensity model and engagement event triggers. However, decisioning support for journey activation and personalization requires users to work in external CRMs and MAPs.

Redpoint Global

Redpoint Global is a Niche Player in this Magic Quadrant. The Redpoint CDP focuses on delivering a composable solution that provides access to all customer data for segmentation and activation that can be observed within the platform. Redpoint Global's operations are primarily based in North America, but it also has offices in EMEA and APAC. Its clients tend to be large enterprises in the retail, healthcare, financial services and hospitality industries. It plans to further enhance its data cloud capabilities to improve performance, as well as reduce replication and redundancy. In addition, it plans to enrich its use of AI within segmentation, orchestration and data observability.

Strengths

- **Data privacy:** Redpoint CDP ensures that data is fully encrypted and compliant for the EU's GDPR and the U.S.'s HIPAA from ingestion to activation. The solution also provides strong controls via data clean rooms, private workspaces and PII vaults to ensure security of its customer's data.

- **Overall viability:** Redpoint Global currently maintains a healthy customer volume relative to other vendors evaluated in this research. In addition, it has maintained a net retention rate more than 100% over the past four years and currently sees the highest average customer revenue of vendors in this research.
- **Vertical enablement:** Redpoint CDP offers industry-specific data models, templates, reports and best practices for financial services, healthcare, travel and hospitality, and retail, among several others. In addition, it offers deeper control and encryption for underlying data for highly regulated industries.

Cautions

- **Resourcing complex use cases:** Customers seeking to customize rules associated with identity matching or to implement more complex data tasks and transformations will have to use Redpoint Global's data manager to accomplish these tasks. Because data manager is a more technical environment, clients will often need to leverage Redpoint Global's team, partners or internal resources within IT to accomplish more technical work.
- **Market visibility:** Despite its longstanding presence as a vendor of enterprise customer experience solutions, Redpoint Global was not cited as a shortlist competitor for new business among any other vendors considered for this research. Redpoint Global dedicated a comparatively higher-than-average percentage of marketing programs to the martech and revtech personas, and a lower-than-average percentage to IT.
- **Limited B2B support:** Redpoint Global experienced the second lowest percentage of customers operating a B2B business model. B2B use cases like lead generation, activation and B2B-specific data ingestions require custom implementations or support to achieve a desired end state.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its Data Cloud serves as its platform's CDP, with features for profile unification, identity resolution, segmentation, activation and analytics. Salesforce serves enterprises globally across industries, focusing on customer-centric solutions in banking, healthcare, retail and media. It differentiates itself through native integration with Salesforce's broader platform, robust compliance and governance capabilities, and features like Agentforce for AI-enabled automation. Its roadmap

emphasizes expanding AI-enabled functionality, unifying customer profiles across its CRM clouds and expanding its Zero-Copy Framework to streamline data access and activation.

Strengths

- **Platform advantage:** Data Cloud's foundational data management in Salesforce's platform provides comprehensive data unification and activation across the enterprise, enabling a unified commercial organization. It coordinates marketing teams with sales and service and reduces data silos to leverage insights from multiple departments more effectively.
- **AI and data innovation:** Data Cloud's processing of unstructured interactions, like voice and chat through its Einstein and Agentforce AI tools, empowers organizations to automate complex workflows with GenAI, while improving predictive insight access across functions. Data Cloud One acts as a data fabric, linking individual Salesforce instances for an enterprisewide view of customers, enabling more cohesive and scalable data management.
- **Broad ecosystem support:** Salesforce's large partner network and active Trailblazer community provide robust support and resources to help clients adopt and maximize Data Cloud innovations. Enterprises can also leverage its partnerships to build tailored integrations that align with their unique data and marketing needs.

Cautions

- **Third-party integrations:** Data Cloud's value as a stand-alone CDP is constrained by its centrality in the Salesforce platform. Organizations heavily reliant on non-Salesforce systems may find the limited number of prebuilt connectors or integrations with third-party tools reduces the CDP's utility and may struggle integrating it into technology stacks.
- **Emerging real-time capabilities:** Real-time personalization is natively built within Data Cloud. Due to the recency of its release, buyers should seek customer references to help assess its real-world performance or cost. Organizations considering these capabilities should plan for potential unknowns during early adoption.
- **Cost forecasting:** Salesforce's consumption-based pricing poses challenges for buyers attempting to forecast total costs, as it's difficult to translate familiar CRM activities, like marketing campaigns or customer service actions, into accurate data-credit-usage estimates. This forecasting uncertainty can complicate budget planning and increase buyer regret risk over unexpected operational expenses.

Tealium

Tealium is a Leader in this Magic Quadrant. Its Customer Data Hub emphasizes data orchestration, governance and compliance. The company primarily operates in North America, EMEA and APAC, particularly Japan, serving large enterprises from a variety of industries and business models. Its CDP has steadily evolved from its heritage as a tag management solution due to strong product leadership and development. It plans to continue creating support for real-time use cases with its new Moments API feature, as well as extend the capability by applying AI for insight generation.

Strengths

- **Real-time zero-party data capture:** In 2024, Tealium launched Moments IQ. This feature allows for in-the-moment zero-party data capture, which helps users gather information directly from their website visitors by letting visitors share their preferences and intentions in real time.
- **Clear, flexible pricing and packaging:** Tealium provides clear, flexible pricing and a default package for potential customers. This approach runs counter to its competitors, who have pursued increasingly complicated pricing and packaging schemes that depend on consumption fees, add-on products and activations.
- **Privacy, consent features:** The platform automates blocking parameters and allows users to configure multilevel trust for CDP destinations. In addition, Tealium's support for healthcare and life sciences continues to serve as a strong point of its offering, providing real-time protected health information (PHI) detection for regulatory compliance and consent orchestration for real-time opt-out.

Cautions

- **Support for data sharing:** As zero-copy data and cloud data warehouse integrations become nearly ubiquitous in the CDP market, Tealium's market strategy departs from this trajectory. Its streaming data and observability features play to its strengths, but the company has not embraced features that some prospective clients increasingly seek in this market.
- **Longer implementation times:** Tealium reported one of the longest timeframes to reach production among vendors in this research, reflecting its clients' focus on large and complex implementations. The company has a strong focus on customer satisfaction, but

potential clients will need to balance time-to-value with a minimum viable implementation that fulfills their use cases against recommendations made by the vendor.

- **Personalization support:** Tealium's product development has emphasized data collection, unification and integration, leaving personalization largely delegated to external tools. Prospective clients whose use cases emphasize personalization and decisioning over data orchestration should carefully consider Tealium's ability to satisfy their needs.

Treasure Data

Treasure Data is a Challenger in this Magic Quadrant. Its CDP, known for its flexible data models, configurations and ability to ingest and activate on large volumes of data, consists of Data Workbench, Integration Hub, Treasure Insights and Audience Studio. Its operations are concentrated in North America and Japan, with B2C and B2B clients across financial services, CPG, retail and others. Its roadmap includes enhanced orchestration capabilities via AI agents that support a range of use cases, including segment and journey creation and insight generation. Its roadmap also includes plans to improve management of real-time behaviors and decisioning to support personalization.

Strengths

- **Technical use-case support:** Treasure Data designed its product for advanced data storage and processing use cases in support of its vision for a more IT-centric capability mix over a marketer-centric mix. Its percentage of users who are data architects and engineers is the highest among the providers in this evaluation.
- **Customer success strategy:** Treasure Data has a strong, active and responsive customer success function. It supports a council of both prospects and customers that provides input on product direction. Customer suggestions are prioritized based on revenue impact.
- **Global, multibrand organization support:** Buyers whose organizations are large, global multibrand organizations, like CPG and fast-moving consumer goods, will appreciate Treasure Data's differentiated approach to profile unification. Its workflow embraces a data virtualization approach, Master Segments, which allows these enterprises to manage profiles centrally while also enabling individual brands/business units to set their own unification rules.

Cautions

- **Pricing:** Treasure Data reports a three-year cost against a pricing scenario typical for enterprise buyers that is significantly higher than the self-reported average in this evaluation. Buyers should carefully document their CDP use cases, scrutinize how those use cases are tied to proposed Treasure Data pricing and monitor this dynamic throughout their contract.
- **Technical user interface:** While the CDP has strong engineering support, its interface includes pro-code features best suited for technical users. Gartner Peer Insights reviews note the barrier the UI presents to driving significant product usage from nontechnical teams. The low proportion of marketing and creative end users in a typical Treasure Data deployment indicate a need for technical involvement to meet the challenge of integrating the CDP into marketing workflows.
- **Market understanding:** Although Treasure Data regularly features on Gartner enterprise clients' shortlists, about one-third of the company's customers are organizations with less than \$50 million in revenue. Buyers in large enterprise organizations with more than \$1 billion in revenue should carefully evaluate how Treasure Data prioritizes its use cases and services its organizations.

Twilio

Twilio is a Niche Player in this Magic Quadrant. Its Segment CDP enables Twilio to differentiate its communications products by infusing contextual customer data while innovating for stand-alone CDP customers with data warehouse integrations and AI capabilities. It mostly serves B2C and B2B clients in North America, EMEA and APAC. It includes Connections (data management), Unify (profile unification and attribute management) and Engage (audiences and journey orchestration), with Protocols (data validation and cleaning) as an add-on. It plans support for hyperpersonalized journey triggers combining event, data warehouse and profile data context, single API for LLM-based virtual agents, and improved audience observability and alerts.

Strengths

- **Flexible customer data ecosystem:** Twilio Segment CDP features a flexible, open ecosystem with more than 700 prebuilt connectors. New capabilities include its Functions Co-Pilot, with more than 5,700 custom functions to help accelerate data management integrations for customers, and a Linked Audiences tool for marketers to directly query and segment in a data warehouse using a no-code interface.

- **Privacy:** Twilio Segment CDP integrates with CPMs, including OneTrust, and enables compliance with the EU's GDPR, California's CCPA and the U.S.'s HIPAA to be streamlined through its Privacy Portal with real-time automated identification and classification of personal data, including PII and PHI. Schema controls selectively block or omit properties while streaming and enable a single source of truth and tracking plan for the customer events/properties being collected.
- **AI transparency and controls:** Twilio provides AI transparency through AI Nutrition Facts Labels and automatically identifies and classifies PII and PHI in real time by enforcing schema controls.

Cautions

- **Growth and direction:** Recent earnings calls indicate revenue is trending flat, and Twilio leadership expressed there is still more work to do on its CDP business. This is despite progress on planned AI and data warehouse integration initiatives and higher growth rates year over year with enterprise clients. Potential buyers must evaluate whether its investments in capabilities align with their planned use cases, integration needs and skill sets.
- **Buyer go-to-market alignment:** While successful with AI-enabled use cases for customer service and success teams, this work represents up to 15% of Twilio's user base. With a user experience split between engineering and business personas, this may cause friction in the buying process, and technical challenges and usability and adoption issues for some new users.
- **Support:** With fewer reported customer service staff members than other vendors in this research, buyers with complex integrations should factor in additional time and support resources. Peer Insights reviews reported organizations facing delays due to long response times from support teams.

Zeta Global

Zeta Global is a Niche Player in this Magic Quadrant. Its Zeta Marketing Platform integrates the Zeta Customer Data Platform, Email Service Provider (ESP) and Demand-Side Platform (DSP), delivering data management, segmentation, personalization and omnichannel activation. It operates mostly in North America and Europe, serving primarily B2C marketers in retail, financial services and media. Zeta's CDP is designed to support its broader

marketing platform, emphasizing data ingestion, enrichment and activation across owned and paid channels. Its roadmap prioritizes AI-driven workflow enhancements, including GenAI agents for audience building, reporting and predictive model development.

Strengths

- **Multichannel data activation:** Zeta's CDP integrates with its email and programmatic advertising platforms to orchestrate campaigns across owned and paid channels. Marketing teams can target audiences in email marketing, social media, programmatic ads and retail media networks, bolstered by Zeta Data Cloud's enrichment of first-party data for targeting.
- **AI-driven audience building:** Zeta CDP's Zeta Opportunity Engine is an AI assistant that accelerates audience segmentation and campaign deployment. It simplifies audience creation with an interactive, low-code interface that reduces the need for deep analytical expertise by leveraging the CDP's bundled predictive models.
- **Service and support network:** Zeta continues to expand its network of regional and global service providers, including partnerships with Accenture and Merkle. Organizations use its professional services for tasks such as data mastering, journey design and operational execution, helping buyers seeking strategic or transitional full-service support in data-driven marketing.

Cautions

- **Marketing-centric strategy:** Zeta's CDP primarily supports its martech and programmatic advertising offerings, limiting its appeal to stand-alone and cross-CRM CDP buyers. Organizations seeking a CDP for broader enterprise data orchestration may find its focus on marketing-specific use cases insufficient. Buyers not already invested in Zeta's other products should scrutinize Zeta's support for third-party integrations before inserting its CDP into cross-functional and enterprisewide use cases.
- **Technical user gaps:** While the Zeta CDP is marketed as AI- and ML-enhanced, its primary users remain in marketing rather than technical or cross-functional roles. Enterprises looking to align marketing initiatives with IT or data science functions should evaluate whether its platform meets their cross-departmental collaboration needs.
- **Time to value:** Zeta's reliance on professional services and its longer production cycles may extend the time required to realize value from its CDP. Enterprises with fast-moving

marketing needs or broader enterprise support needs should assess whether its onboarding and operational support align with their agility requirements.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors were added to this Magic Quadrant.

Dropped

- **Blueshift** was dropped because its CDP revenue did not meet the updated minimum in this year's inclusion criteria for this research.
- **Dun & Bradstreet** was dropped because its CDP did not meet the minimum base software requirements or revenue threshold in this year's inclusion criteria.
- **Leadspace** was dropped because its CDP revenue did not meet the updated minimum in this year's inclusion criteria for this research.
- **SAP** was dropped because its CDP revenue did not meet the updated minimum in this year's inclusion criteria for this research.
- **Zeotap** was dropped because publicly available information indicated its CDP revenue did not meet the updated minimum in this year's inclusion criteria for this research.

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need to satisfy the following criteria:

- CDP products must be generally available. General availability is defined as something a vendor's clients have in a production environment, rather than something they are testing or evaluating.
- CDP products must be available for purchase as a stand-alone software offering without requiring the purchase of other modules or products from the vendor.
- CDP products must have a proven ability to deliver CDP functionality. CDPs are defined as software applications that support marketing and customer experience use cases by unifying a company's customer data from marketing and other channels. CDPs optimize the timing and targeting of messages, offers and customer engagement activities, and enable the analysis of individual-level customer behavior over time.
- At a minimum, base CDP software offerings (product configuration or bundle) must perform:
 - **Data collection:** Ingest (extract) first-party, individual-level customer data from multiple sources and formats, online and offline, in real time and without limits on storage. Data persists as long as needed for processing and is typically left unchanged in its original source. This includes both anonymous and known first-party identifiers, behaviors and attributes.
 - **Profile unification:** Consolidate profiles at the person level and connect attributes to identities. This may include aggregating customers into a household or buying group level.
 - **Activation:** Send segments, with instructions for activating them, to engagement tools for email campaigns, mobile messaging and advertising, among others.
 - **Analytic reporting:** Analyze performance for various levels of customer data, such as the attribute level, profile level or segment level.
- The vendor is required to meet one of the following (reported as constant currency):
 - At least \$75 million in software license revenue from the base offering (configuration or bundle) of its CDP product in calendar year 2023
 - At least \$40 million in software license revenue from the base offering (configuration or bundle) of its CDP product in calendar year 2023, and 20 new clients (logos) in production with the CDP product when compared to calendar year 2022

- Definitions:
 - **Software license revenue:** Exclusive of revenue from data licenses.
 - **New client:** A customer who has successfully deployed the customer data platform solution in a production implementation.
 - **Clients in production:** A client who has successfully deployed the CDP. At a minimum, they have ingested data, unified it and created audiences that are sent to at least one activation channel.
- At least 75% of 2022 calendar year revenue for CDP is attributable to software, either SaaS/subscription revenue or new license sales (on-premises).
- More than 60% of company CDP revenue comes from clients located in North America and EMEA.
- Rank among the top 25 organizations captures a strong degree of customer interest defined by Gartner for this Magic Quadrant. Data inputs used to calculate customer interest include a balanced set of measures, such as:
 - Gartner client trend data
 - Social media engagement
 - Media presence
 - Brand engagement (e.g., search volume and traffic)

Honorable Mentions

Blueshift CDP focuses on unifying data for personalized campaign automation and media management. Its operations are primarily focused in North America and Europe, and its clients are mainly midsize B2C retail, media, and financial services and insurance organizations.

Dun & Bradstreet offers D&B Rev.Up ABX, an account-based marketing platform that focuses on enabling B2B customers to unify, enrich and score hierarchical account and contact data, and to activate audiences for multichannel marketing campaigns. Its customers are primarily midsize and enterprise B2B organizations in North America, with the majority from high tech and business and financial services sectors.

LeadSPACE focuses its Drive B2B CDP on B2B target account/person and segment prioritization and planning by identifying high-potential prospects and market opportunities through propensity modeling and buying signals. Its operations are focused in North America, and its clients tend to be large enterprises from technology and manufacturing.

SAP focuses its CDP on helping brands build a 360-degree view of customers for activations beyond marketing and into operations. Its relatively new entry into the market offers a good option for buyers who are already using SAP applications. Its operations are geographically diversified, and its clients tend to be large enterprises, with most in retail and consumer products.

Zeotap offers a modular CDP: Unify (data ingestion and unification), Audiences (audience builder including native third-party data enrichment), Journeys (real-time journey orchestration) and Destination (audience activation). It aims to achieve accelerated time-to-value with a use-case-led approach focused on economic returns. Its operations are mostly in Europe and the Middle East, and its clients are midsize to large enterprises in telecommunications, media, retail and financial services.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable a marketing team's performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation within Gartner's view of the market. With wide-ranging functional, support and service requirements, it's important to keep in mind the important aspects of a vendor's Ability to Execute.

Product/Service: Core goods and services that compete in and or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills and so on. This can be offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria. Specifically, we evaluate the execution of the functionalities.

Overall Viability: An assessment of the organization's overall financial health as well as the financial and practical success of the business unit. It also includes the likelihood of the

organization to continue to offer and invest in the product as well as the product position in the current portfolio. Specifically, we examine evidence of profitability and growth, customer growth and retention, and R&D investment, as well as alignment and levels of current and planned organizational resources.

Sales Execution/Pricing: The organization's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. Specifically, we examine evidence of the support for the presales process, understanding of typical buyer and user personas, understanding of typical implementation approaches, the availability of assessments and POCs, and information on pricing models and pricing flexibility.

Market Responsiveness and Track Record: The ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the provider's history of responsiveness to changing market demands. Specifically, we assess how customer needs are considered in developing product updates, information about customer success programs and clients' ability to deliver measurable ROI on their technology investment.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This "mind share" can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities. Specifically, we look for evidence of market visibility in the geographic markets served and messages that align with target buyer challenges and desired operational and strategic outcomes.

Customer Experience: Products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. This includes quality supplier/buyer interactions, technical support and account support. This may also include ancillary tools, customer support programs, the availability of user groups, service-level agreements, etc. Specifically, we assess client satisfaction, information on technical support and implementation, user interfaces that support target user roles, and availability and viability of internal customer service and support capabilities, including customer success programs, customer communities, user forums, support resources, systems and policy.

Operations: The ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently. Specifically, we assess the operational health and ability to deliver for customers consistently and efficiently, whether directly and/or through partners (including via professional services).

Table 1. Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	Medium

Source: Gartner (March 2025)

Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs, and competitive forces. It also includes how well they map to Gartner's view of the market.

Market Understanding: The ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market — listen, understand customer demands, and can shape or enhance market changes with their added vision.

Specifically, we assess the understanding of CDP cost to value (improving the strategic value of CDP investments), the approach to composable architectures (enhancing CDPs to operate effectively within a client's larger data architecture), and plans for enabling AI (plans to strengthen the role the CDP plays in enabling new AI/ML use cases in marketing).

Marketing Strategy: Clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements. Specifically, we assess the current state and the plan to improve/solidify market visibility across various stages of the customer journey as well as messaging that clearly differentiates position in the market.

Sales Strategy: A sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service and communication. Partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base. Specifically, we evaluate how the sales strategy is adapted for customers of different sizes or levels of maturity, or with different needs, as well as the dedicated sales resources and partner network.

Offering (Product) Strategy: An approach to product development and delivery that emphasizes market differentiation, functionality, methodology, and features as they map to current and future requirements. Specifically, we assess the product roadmap, how successful implementation is achieved, how new approaches to address specific issues/client demand are informed and developed, and the integration/ecosystem partnerships with third parties.

Business Model: The design, logic and execution of the organization's business proposition to achieve continued success. Specifically, we assess the significance of the CDP product to the overall business and any key partnerships or divestitures. We examine the alignment of go-to-market and sales strategies for particular industries, geographies and delivery models. We also look at how the product strategy supports the business model as well as how the product license model (for example, SaaS versus a one-time license fee) effectively supports the targeted market.

Vertical/Industry Strategy: The strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. Specifically, we gather information regarding vertical- and industry-specific product roadmaps/partnerships.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes. Specifically, we assess your outlook toward innovation for differentiation, appropriate M&A exploration and execution as well as information on patents/trademarks/unique IP, development plans and alignment of those plans with newer technologies coming to the market.

Geographic Strategy: The provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the home or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market. Specifically, we look for any region-specific partnerships to support locations and product capabilities that meet unique customer needs in various regions.

Table 2. Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Low

Source: Gartner (March 2025)

Quadrant Descriptions

Leaders

Leaders in this Magic Quadrant satisfy the core use cases of large enterprises. They have a strong understanding of the needs of these buyers, who are looking at their CDP not in isolation, but as a strategic enterprise investment. In turn, Leaders have a well-articulated medium- and long-term view of the market. Buyers view their CDP as either a crucial component for their data and analytics workbench, or as a broader, enterprisewide data ecosystem. Leaders embraced a product vision that aligns with these buyer needs. They satisfy buyers' cost-to-value questions by delivering features for AI enablement and open, composable architectures.

Challengers

Challengers in this Magic Quadrant excel at coordinating data management to unify customer profiles and have strong product functionality. However, they have a limited range of use cases across business functions, and their AI enablement capabilities aren't as robust. They need to better demonstrate the value of their AI features and develop a more innovative vision for integrating the end user's tech stack, which is crucial for a CDP. While they offer innovations in data sharing and modularity, there's room to enhance their application integrations.

Visionaries

Visionaries in this Magic Quadrant have a strong and promising vision, although they encounter some challenges in execution and delivering consistent impact across all client use cases and industries. They aim to lead the industry with emerging and advanced functionalities, such as leveraging integrations and data from cloud data warehouses. However, the total cost of ownership can be unclear due to complex packaging and consumption, which can affect the consistency of the customer experience. They need to better demonstrate consistent delivery to clients leveraging increasingly complex product portfolios. Their roadmaps are promising, although some items may progress at a different pace compared to competitors.

Niche Players

Niche providers in this Magic Quadrant are struggling to meet enterprise needs. As competition grows, they face challenges like unclear long-term plans and tough fundraising conditions. They often don't know who their ideal buyers are and have trouble aligning their products accordingly. With buying groups becoming more cross-functional, these vendors still focus too much on marketing buyers and have difficulty expanding their sales approach. Many struggle to add value without a platform approach that integrates with other applications, and they often overlap with other enterprise technologies.

Context

In 2025, CDP technology is an enterprise data strategy decision. Vendors have increasingly focused on the strategic value the platform provides. As a result, enterprise IT organizations view their CDP investment as an essential component for both upstream technical users and downstream business users.

This is atypical. All technology purchases require a large buying group, but in the case of the CDP, the purchase decision becomes an enterprise strategy choice and not just a governance decision. Nearly every C-suite leader has a stake in the CDP buying decision. The 2025 Gartner Business Buyer Survey reveals that an average of two to three groups typically contribute requirements and objectives for a CDP purchase. These groups include roles reporting to the CIO, CTO, CDAO, CMO, CPO and other customer-focused groups.¹

In an environment of complex purchase decisions across a cross-functional buying group, CDP cost-to-value optimization has become the biggest concern for buyers. The ability of CDP providers to deliver a compelling cost-to-value proposition is paramount. As CDP-like capabilities become pervasive within an organization's CRM ecosystem, vendors will need to clarify and streamline their pricing in an environment where arguably multiple CDPs exist in adjacent martech solutions (e.g., multichannel marketing hub [MMH], B2B marketing automation platforms and personalization engines) and across other enterprise data solutions (e.g., cloud data warehouses, master data management, and identity and access management).

The cross-functional buying group must justify CDP investment by shifting the cost-to-value narrative. Instead of telling a story of data automation and management, they must address how automating customer data management and profile unification leads to increased revenue.

Two emerging characteristics of CDPs will help accomplish this: composable architectures and AI enablement. Providers need to satisfy at least one of these to demonstrate value creation against their clients' business cases.

Composable Architectures

Composable architectures reduce storage and operational costs by offering modularity and connection to data ecosystems. The shift toward composable architectures is reshaping enterprise technology strategies.

In this context, CDPs must seamlessly integrate with large-scale cloud data platforms, serving as critical components within a broader ecosystem. The role of a CDP in a composable architecture is to unify customer data to discover insights and facilitate interactions across various enterprise applications. As organizations adopt modular approaches to technology, CDPs offering robust interoperability and flexibility will be more attractive to buying groups.

Buyers will increasingly seek out these open architectures, sometimes referred to as data ecosystems. These offer enterprises a cohesive data management environment that supports all data and analytics workloads. They have a common governance and metadata management framework, and unified access management. They integrate augmented data management capabilities with a set of services accessible by the business user. Third-party independent software vendors (ISVs) also participate in data ecosystems.

Buyers should evaluate the provider's ability to integrate within an open, composable architecture. This includes assessing the CDP's interoperability with existing cloud data platforms and other enterprise applications. Buyers should seek providers that offer flexible, modular solutions capable of adapting to evolving business needs. They should also demand efficient data utilization to achieve business outcomes, and seek providers who can deliver reporting in their software to help calculate economic value and ROI.

AI Enablement

AI enablement scales data automation and enables business process automation. The integration of AI and machine learning capabilities within CDPs is becoming a key differentiator. Enterprise application providers can claim that data automation leads to business acceleration and growth, as their CDPs are innervated into their product stacks.

Providers that can operationalize AI models to support advanced marketing use cases, such as predictive analytics and personalized customer journeys across a variety of customer touchpoints, will be highly sought. This involves enabling sophisticated AI-driven processes beyond mere data activation, including model fine-tuning and last-mile personalization. What's more, agentic AI stands to deliver what once were technical capabilities to front-office users in customer-facing functions, providing autonomous decisioning and actioning to the customer experience.

Buyers should focus on how they can enable their use cases with AI and ML capabilities. For those in the market for better data management, AI features of the CDP can help. But for those seeking better go-to-market outcomes, they need to evaluate their CDP choice in the context of the downstream business processes supported by the AI in the CDP.

This evaluation focuses on how vendors fulfill marketing and customer experience use cases for business users primarily in North America and Western Europe.

Market Overview

Market Metamorphosis Continues

EAPs Continue to Emphasize a Portfolio Approach

Large enterprise application providers (EAPs), particularly those in CRM and ERP, have recognized the strategic value of CDPs in unifying customer data across various business functions. These megavendors have integrated CDP capabilities to streamline data management across their portfolios, facilitating data activation not only for marketing but also for sales, customer experience, finance, customer support and product management.

This integration has led to rapid adoption of integrated solutions, contributing to market consolidation and reducing the number of multi-CDP buyers. In the broader CRM marketing software market, the top five vendors hold a 44.4% share (Salesforce, Adobe, Epsilon, HubSpot and Constant Contact). (See [Market Share Analysis: CRM Marketing and Cross-CRM Software, Worldwide, 2023](#).) As a result, the market is consolidating with a mix of familiar, viable providers, and each vendor's commercial success is decoupled from its placement in this Magic Quadrant.

Centralized Customer Data Storage Sparks Innovation in Data Sharing and Federation

Gartner predicts that by 2028, the data management markets will converge into a single market of a data ecosystem, enabled by data fabric and GenAI. This will reduce technology complexity. Enterprises already are centralizing their data storage and management, a trend that benefits both EAPs and cloud data infrastructure providers like Snowflake, AWS and Google. This comes as organizations seek to unify all customer data, extending beyond first-party marketing data to include intelligence-driven insights across customer touchpoints.

CDP vendors have renewed their focus on data sharing innovations, including zero-copy or zero-ETL approaches. These methods allow users to avoid data replication, allowing the data to remain in its original location and minimizing or eliminating costs for data movement. They hope to reduce the complexity of data management between the data warehouse and the application, which in this case is the CDP. While vendors seek alternative pricing models that better align with these operating approaches, buyers will need to become more comfortable with understanding compute costs as opposed to profile-based pricing.

Buyers expect their CDPs to support data warehouse access across all major vendors, including AWS, Microsoft, Databricks, Google and Snowflake. Vendors' ability to support integrations with all of these warehouses is fast becoming a point of parity in this market, as buyers often have exposure to multiple platforms.

Value Proposition of Composable CDPs Taking Root

In response to the need for flexibility and cost-efficiency, some independent CDPs have introduced modular deployment options that complement separate data warehouse investments (e.g., ActionIQ, Redpoint). These composable CDPs offer a solution that combines the storage and compute capabilities of cloud data warehouses with the profile management and activation features of traditional CDPs. This approach is particularly appealing to organizations with mature data engineering and data science functions, as it helps to reduce redundant data silos and better serve both business and technical users.

Business Users Continue to Show Limited CDP Use

Despite the strategic importance of CDPs, their utilization by business users remains low, with only 22% of marketers reporting high utilization. Instead, marketers often rely on other solutions, such as personalization engines, account-based marketing platforms, marketing automation platforms and multichannel marketing hubs, to carry out their tasks. CDPs are serving as enabling technologies rather than primary tools for marketing operations. This has led CDPs to embed their capabilities within existing marketing workflows, such as

journey orchestration and demand generation, enhancing their utility for front-office workflows.

Metamorphosis Fuels Market Consolidation

Taken together, this metamorphosis has added momentum to market consolidation outside of the enterprise application vendors. In late 2024, Uniphore announced its acquisition of ActionIQ. This was followed in early 2025 by Contentstack (a digital experience platform) announcing its acquisition of Lytics and Rokt (a digital commerce technology) merging with mParticle.

In addition, existing vendors seek to diversify their offerings, such as BlueConic acquiring Jebbit (a platform for creating interactive content for first-party data collection). We foresee substantial changes in the competitive landscape as this rapid transfer of equity progresses, with private equity having a significant effect on forthcoming market consolidation.

Ubiquity of Customer Data Platforms

CDPs are an independent technology category of stand-alone, packaged solutions. But CDPs set the standard for how all customer-facing functions manage customer data through capabilities such as ingestion, profile unification and activation.

However, as neighboring martech (and enterprise tech) needed capabilities for processing customer data, most vendors in these adjacent categories incorporated CDP-like functionalities into their offerings. This trend is evident in the evolution of multichannel marketing hubs (MMH), marketing automation platforms (MAP), personalization engines (PE) and customer relationship management (CRM) tools, which have increasingly integrated CDP capabilities either as companion licenses or embedded features. The CDP is nearly ubiquitous across enterprise technologies that create customer-facing experiences.

This trend reflects a broader shift toward a more unified approach to data management, combining batch and streaming analytics with continuous profile unification processes. In this case, the CDP capabilities offer newer, more comprehensive features to enhance existing technology without fundamentally altering the core of its offering. In the context of martech, adopting a CDP-like architecture has become the de facto standard for building competitive martech products.

At the same time, enterprise data management leaders are finding their strategies must accommodate a fragmented market of data management solutions. These solutions include

stand-alone products (e.g., data integration, metadata management, master data management), point solutions (e.g., data warehouses, data virtualization, reverse ETL), and adjacent markets (e.g., analytics and BI platforms, app integrations, and data science and ML platforms). Innovations in data fabric capabilities, consolidation in multimodal persistence (e.g., lakehouse, graph stores, warehouses and others), and an emergence in data ecosystems to unify data management platforms promise to increase data reusability in a converged data management market.

The uneven levels of maturity across the components of the data ecosystem may mean that full realization for end users is 10 or more years away. Buyers should view the CDP as an essential component of their customer data management ecosystem, but planning with a long-term view around these future demands is difficult. According to the 2024 Gartner Technical Architect Survey, the top factor making technical architects' decisions harder was the increasing pace of change.² This underscores the importance of selecting vendors whose capabilities and availability promise to bolster the strength and integration of their customer data ecosystem.

The proliferation of CDP capabilities across multiple platforms raises cost and redundancy concerns. To address this, vendors are increasingly exploring consumption-based pricing models that focus on charging based on platform usage (e.g., segment activations, real-time data processing, calculated attribute production) while also pursuing composable architectures. Both are potential solutions that help end users streamline data management while optimizing resource allocation.

By shifting their focus from duplicate data storage to compute-driven value creation, vendors can better align their offerings with the strategic objectives of their clients. This approach not only reduces unnecessary costs but also enhances the competitive edge of neighboring solutions, like the MMH, by concentrating investment on the capabilities that drive multichannel marketing results.

In the future, the concept of these composed martech stacks suggests that, by emphasizing modular martech licensing, they can optimize budget allocation as well. In that paradigm, businesses can maximize the value derived from their data lakes, allowing for more efficient and effective customer engagement strategies. As the market continues to evolve, vendors that embrace these principles will be well-positioned to thrive in an increasingly interconnected data ecosystem.

Prioritize AI's Role in Enhancing Upstream Business Value

In 2024, AI gained significant momentum across all technology categories, including the CDP market. More than half of the vendors surveyed for this research claimed their most significant innovation was related to the development of AI capabilities. Examples of recent developments include the acquisition of ActionIQ by Uniphore (a conversational AI platform), BlueConic's LLM segmentation, and the launch of Agentforce by Salesforce.

Three significant trends underpin the imperative for CDPs to develop AI features:

- **Diverse buying groups:** The CDP purchasing process now involves multiple stakeholders. According to the 2025 Gartner Business Buyer Survey, the average number of groups providing funding for CDP purchases is five, with two to three groups typically contributing to the requirements and objectives. ¹
- **Cross-functional CDP users:** The user base for CDPs spans various business functions. Vendors indicate that their primary users are, on average, 30% marketing (e.g., marketing technology leads, digital marketers, campaign managers) and 30% IT (e.g., data architects, engineers, IT leads). Additionally, approximately 20% of users are in customer experience roles such as customer service, sales, governance and risk management.
- **CDPs as enterprise hubs:** This diversification in buying groups and user makeup occurs at a pivotal moment. CDPs are set to become the central hub for managing customer data and enhancing customer experience by integrating AI to make data more actionable and insights more accessible for both technical and nontechnical users.

Vendors will need to focus on helping their clients show how these AI innovations translate to improved performance. That's difficult to do. While improvements in personalization, targeting and decisioning can increase the ROI of a go-to-market motion or marketing campaign, the impact will be relatively small and difficult to translate to a cross-functional group of stakeholders.

In addition, improvements in workflow optimization and accessibility for nontechnical users is promising, but these have impact on resourcing and do not easily translate into top-line business impact metrics. Enterprises need to determine if their data is AI-ready, where they're able to prove the fitness of data for the specific AI use case. What's more, without AI-ready data, users will struggle to maximize their AI effectiveness. The AI innovations from vendors risk having limited impact.

To show how AI improves performance, CDP buyers will need to pair the outcome with business applications that exist above the CDP. This underscores the CDP's role as a

component of a broader data ecosystem. For example, AI-driven customer data management could automate routine tasks like data cleansing and enrichment, improving data quality and expediting data preparation while reducing the workload on data engineering teams.

But to show impact, the business would need to translate the value of data automation against a metric like revenue, profitability or market share. It also furthers the imperative of AI enablement, as buyers may increasingly require vendors to evolve their agentic AI capabilities so systems can act autonomously with minimal supervision, adapt to their content and execute goals while connecting these innovations to the value they create for the business.

Update Already-Outdated RFPs

As market dynamics evolve rapidly, many RFPs fail to reflect current capabilities and pricing considerations. Vendors are largely shifting to consumption-based pricing models for CDPs. The consumption-based pricing model refers to a range of different models offering varying degrees of flexibility, such as pay-as-you-go (PAYG), pay-as-you-use, transaction-based and credit-based pricing. There is no industry standard for these terms. Despite the flexibility these models promise, they often require upfront, multiyear commitments.

Buyers of CDPs with consumption-based pricing must collaborate with their IT department to assess their organization's appetite and need for such a pricing model, and capture priority current and future use cases for business stakeholders upfront.

Given that CFOs often prioritize budget predictability, buyers will need to build a strong business case to justify the flexibility offered by consumption-based pricing, and provide a set of forecast assumptions for consumption and cost. Before committing, measure or track CDP usage through software asset management (SAM) or cloud/SaaS financial management tools, or request a measurement tool from the CDP vendors themselves. Few CDP vendors currently offer such a tool, but it should be a key component of your POC phase.

When obtaining information from potential vendors:

- Seek consumption-based pricing options, especially if your business experiences seasonality or variable demand.
- Ensure the pricing agreement includes tiered pricing for higher volumes to leverage economies of scale, and negotiate a reasonable rate for overage pricing to avoid

excessive charges.

- Aggregate credit volumes over a multiyear agreement to prevent a “use it or lose it” scenario annually.
- Secure a pricing agreement that specifies both the cost per credit and the terms of credit consumption to protect against changes in the CDP vendor’s offerings.
- Develop a detailed one- to three-year demand forecast to guide your cost modeling and negotiations with CDP providers.
- Implement strong demand management and usage control measures to effectively manage consumption-based pricing. Vendors in this research, such as mParticle, embraced flexible consumption models that allow buyers to roll credits over term to term, as well as at renewal, in order to mitigate some risks of overbuying a CDP.

Les acheteurs doivent adapter leur méthode d'obtention d'informations critiques auprès des fournisseurs potentiels en allant au-delà des appels d'offres classiques. La sélection d'un fournisseur par appel d'offres peut prendre de quatre à six mois. Les appels d'offres classiques ne suffisent plus à suivre la vitesse à laquelle les entreprises doivent s'adapter aux nouvelles technologies et aux tendances de consommation pour rester compétitives. Les acheteurs doivent adopter le processus de preuve de concept (POC) pour exiger des fournisseurs de CDP qu'ils démontrent comment leurs solutions répondent au mieux aux besoins et aux objectifs de l'organisation, et qu'ils les aident à identifier et à prioriser les cas d'utilisation, ainsi qu'à prévoir la consommation et les coûts associés.

Il est essentiel de définir clairement les cas d'utilisation du processus de preuve de concept (POC) afin de valider les déclarations des fournisseurs et de déceler les problèmes potentiels. Lors de la demande de POC, fournissez un formulaire détaillé décrivant les objectifs, la configuration système requise, les niveaux de support, les délais, les accords de confidentialité, les frais, les clauses de résiliation et les résultats attendus. Cela garantit une évaluation complète des solutions CDP potentielles dans un marché en constante évolution.

⊕ Preuve

⊕ Définitions des critères d'évaluation

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