

Magic Quadrant pour les plateformes de données clients

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Les défis liés aux données client pèsent sur le marketing, les ventes, le service, le support et d'autres fonctions d'expérience client de l'entreprise. Les directeurs marketing peuvent identifier les plates-formes de données client appropriées pour centraliser la collecte de données et unifier les données client provenant de sources disparates dans des profils.

Définition/description du marché

Ce Magic Quadrant pour les plateformes de données clients est la première version de ce Magic Quadrant. Il remplace le [Guide du marché pour les plateformes de données clients](#) .

Gartner définit les plates-formes de données clients (CDP) comme des applications logicielles qui prennent en charge les cas d'utilisation du marketing et de l'expérience client en unifiant les données clients d'une entreprise provenant 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 des clients au niveau individuel au fil du temps.

Le but d'un CDP est de centraliser la collecte de données et d'unifier les données clients provenant de sources disparates dans des profils. Les CDP permettent aux spécialistes du marketing de créer et de gérer des segments et de transmettre ces segments vers des canaux prioritaires sans nécessiter de codage ni l'utilisation de techniques d'interrogation avancées. Alors que les CDP ont été créés pour répondre à des cas d'utilisation marketing, l'intérêt des rôles de gestion des données, de l'informatique et d'autres rôles en contact avec le client (par exemple, ventes, service et support) est croissant.

Les leaders du marketing numérique utilisent depuis longtemps divers systèmes pour concevoir, orchestrer et mesurer des campagnes multicanaux. Même si bon nombre de ces systèmes gèrent également les données et les audiences au niveau des clients à des fins de ciblage, ils le font d'une manière qui rend la gouvernance et l'orchestration des données entre les canaux (et entre les solutions des fournisseurs concurrents) un défi. Les CDP visent à relever ce défi en collectant et en unifiant des données client disparates dans un emplacement centralisé accessible aux spécialistes du marketing.

Le CDP ne remplace pas la gestion des données de référence d'une entreprise, mais il peut garantir que les données de profil client, les événements transactionnels et les attributs analytiques sont disponibles pour le marketing lorsque cela est nécessaire pour des interactions en temps réel.



Au minimum, les CDP doivent effectuer :

- Collecte de données
 - Ingérez (extrayez) des données client de première partie, au niveau individuel, à partir de plusieurs sources et formats, en ligne et hors ligne, en temps réel et sans limites de stockage . Les données persistent aussi longtemps que nécessaire pour le traitement et restent généralement inchangées dans leur source d'origine. Cela inclut les identifiants, comportements et attributs anonymes et connus.
- Unification du profil
 - Consolidez les profils au niveau de la personne et connectez les attributs aux identités . Cela peut inclure le regroupement des clients au niveau d'un foyer ou d'un compte pour des cas d'utilisation B2B ou ABM.
- Activation
 - La possibilité d'envoyer des segments, avec des instructions pour les activer, à des outils d'engagement pour les campagnes par e-mail, la messagerie mobile et la publicité, entre autres.

Les CDP devraient fournir :

- Segmentation
 - Une interface qui permet au spécialiste du marketing de créer et de gérer des segments ou des audiences. Les offres de base prennent en charge la création de segments basée sur des règles.
 - Support analytique pour détecter, prioriser et prédire les réponses optimales aux événements significatifs affectant une relation client.
- Intégrations
 - Possibilité de se connecter et d'échanger des données ou des instructions avec d'autres outils, programmes, applications et canaux .
- Gestion des modèles de données

- Une représentation de la manière dont les données client sont structurées et des attributs et dimensions à inclure dans un profil.
- Confidentialité
 - Possibilité de protéger et d'auditer l'accès aux données au niveau de l'utilisateur, de masquer ou d'autres approches pour minimiser le partage de données par inadvertance, de se conformer aux exigences réglementaires telles que le RGPD et le CCPA, et de synchroniser les indicateurs de consentement au niveau du client au niveau individuel.
- Rapports analytiques
 - Analyse des performances pour différents niveaux de données client, tels que le niveau d'attribut, le niveau de profil ou le niveau de segment.

Les fonctionnalités facultatives incluent :

- Personnalisation et orchestration : Optimisation de la messagerie, du contenu, des offres et des interactions via des canaux marketing auprès de groupes d'audience définis par de multiples attributs et dimensions. Cela inclut une capacité d'action suivante, un moteur de recommandation indépendant du canal qui peut fournir des informations aux canaux non marketing tels que les centres d'appels ou les agents de chat en direct.
- Gestion du consentement et des préférences : collecte et consolidation des choix et préférences des utilisateurs finaux concernant la manière dont leurs données personnelles doivent être traitées, et synchronisation de ces choix sur les systèmes et canaux marketing.
- Workbench de science des données : au-delà des modèles prédictifs prêts à l'emploi, la possibilité d'importer et de gérer des modèles d'apprentissage automatique au sein du CDP à l'aide de R ou Python. De plus, il permet des tests A/B et multivariés qui surveillent et optimisent automatiquement l'expérience client en fonction du segment de campagne gagnant.
- Agrégations au niveau du compte : résolution d'identité facilitée par une capacité d'enrichissement des données B2B pour prendre en charge les agrégations de comptes ou d'organisations de contacts associés à une entreprise spécifique, à l'appui du marketing basé sur les comptes et de la gestion des leads B2B.
- Connexions aux canaux et systèmes CX : collecte de données et diffusion des attributs des clients et des engagements marketing au service/support client, au commerce numérique, aux ventes et à d'autres technologies d'engagement client.
- Graphiques d'identité et salles blanches de données : suivi et identification des visites Web pseudonymes à l'aide de partenariats avec des partenaires de résolution d'identité (tels que Merkle ou LiveRamp), ou prise en charge des cas d'utilisation de mesure et d'activation de la publicité via des salles blanches de données.

Quadrant magique

Figure 1 : Magic Quadrant pour les plateformes de données clients



Source : Gartner (février 2024)

Points forts et mises en garde du fournisseur

ActionIQ

ActionIQ est un visionnaire dans ce Magic Quadrant. L'approche modulaire de son CX Hub crée et synchronise les données de profil client avec les entrepôts de données, les systèmes marketing et CX, une stratégie au-delà de la maturité de la plupart des acheteurs en matière de gestion des données. Ses opérations sont basées aux États-Unis et ses clients sont généralement de grandes entreprises des secteurs de la haute technologie, des médias, de la vente au détail et des services financiers. Sa solution de plateforme de données client (CDP) composable permet aux clients d'obtenir des licences sélectives pour ses modules d'identité, d'audience, de gestion de parcours et de CX en temps réel pour compléter les investissements de l'entreprise avec un minimum de duplication. Il prévoit une gestion améliorée des événements pour réduire la latence entre la détection d'un événement dans un parcours client et le déclenchement d'une réponse correspondante ou d'un changement dans l'adhésion à l'audience.

Forces



- **Technologie adaptée aux entreprises** : ActionIQ cible les grandes entreprises ayant des investissements matures dans les entrepôts de données, comme en témoigne la concurrence fréquente dans les cycles de vente avec les grands acteurs martech. Des partenariats et des investissements importants en R&D soutiennent le développement d'un CDP modularisé qui offre un déploiement flexible et repose sur une technologie brevetée de stockage, de transformation des données et d'analyse.
- **Prouesses de l'entrepôt de données** : l'architecture technique HybridCompute d'ActionIQ personnalise le stockage des données client entre la plateforme et l'entrepôt de données d'un client afin de minimiser la réplication et la latence des données. Cela atténue le risque que l'adoption du CDP ne devienne un silo de données. Cette architecture prend en charge les intégrations en temps réel avec Snowflake, Amazon RedShift, Databricks et Google BigQuery. La prise en charge de Microsoft Azure figure sur la feuille de route d'ActionIQ.
- **IA générative (GenAI)** : ActionIQ prend en charge les modèles IA/ML développés par les clients dans leurs environnements de données et dans leur feuille de route produit. Il prévoit de fournir des données sémantiques pour les modèles GenAI développés par les équipes d'IA d'entreprise, ainsi qu'un co-pilote d'analyse intégré au produit avec des interfaces natives permettant aux entreprises d'explorer les données de profil et la segmentation.

Précautions

- **Orientation vers les grandes entreprises** : la plupart des clients d'ActionIQ sont des organisations dont le chiffre d'affaires dépasse 1 milliard de dollars. L'échelle de l'entreprise et la complexité de son produit peuvent s'avérer inutiles et trop coûteuses pour les petites entités, nécessitant trop de personnel technique. Les entreprises ayant des besoins moins exigeants doivent tenir compte des coûts opérationnels et de ressources potentiellement surdimensionnés lors de l'analyse de rentabilisation d'ActionIQ.
- **Prise en charge de l'industrie verticale** : l'approche de verticalisation d'ActionIQ n'est pas très robuste. Il répond aux besoins spécifiques du secteur en matière de gestion des données clients grâce à une combinaison de fonctionnalités en libre-service et de services professionnels. Des personnalisations du modèle de données peuvent être effectuées dans l'interface utilisateur, et la correspondance de profil qui prend en charge les multiples identifiants d'un individu (par exemple, l'adresse e-mail) est configurable via l'interface utilisateur ou avec le support de services professionnels.
- **Priorités d'investissement** : bien que la stratégie composable hybride d'ActionIQ soit avancée, d'autres domaines tels que les interfaces de mesure et d'analyse intégrées au produit ne sont pas aussi bien développés. Les clients notent que les rapports, les analyses et l'intégration prêts à l'emploi (OOTB) sont des domaines d'amélioration potentiels.

Adobe

Adobe est un leader dans ce Magic Quadrant. Son CDP en temps réel se concentre sur la collecte et la rationalisation des données par rapport au modèle de données Adobe Experience Platform (AEP) pour les activer à la fois dans les écosystèmes martech et, plus récemment, adtech. Ses opérations sont mondiales et ses clients ont tendance à être principalement B2C avec quelques B2B et hybrides. Les clients couvrent une variété de secteurs, notamment les services financiers, les services informatiques, les produits de consommation, les médias, la vente au détail, ainsi que les voyages et l'hôtellerie. Sa feuille de route comprend des capacités de fédération de données pour permettre aux clients d'exploiter des données sans copie dans la plate-forme et l'expansion de Sensei GenAI pour la génération et la découverte d'audience via des invites en langage naturel.




Forces

- **Vision de l'entonnoir complet** : Adobe aide ses clients à combiner des données connues et pseudonymes de première, deuxième et tierce partie dans des profils pour prendre en charge les cas d'utilisation de l'entonnoir complet. Il le fait grâce à des fonctionnalités prenant en charge l'acquisition de clients et des cas d'utilisation haut de gamme, tels que la modélisation similaire ; des partenariats élargis en matière de données avec des tiers ; et Segment Match, un moyen respectueux de la confidentialité permettant aux clients de partager des données d'audience.
- **Interface cohérente** : le CDP d'Adobe fait partie de l'interface utilisateur AEP, ce qui facilite la navigation du CDP vers d'autres plates-formes Adobe, telles qu'Adobe Target, pour exécuter des tests A/B. Le CDP contient des liens vers des ressources d'activation, y compris des didacticiels pour aider les nouveaux clients à démarrer via Adobe Experience League.
- **Réseau de partenaires** : Adobe dispose d'une stratégie de partenariat à plusieurs volets qui lui permet d'accéder plus efficacement au marché et de servir ses clients (par exemple, support à la mise en œuvre, conseil) dans les grandes entreprises mondiales ainsi que dans les entreprises régionales de taille moyenne. Il s'agit notamment de plusieurs relations de plus de 20 ans avec des entreprises possédant une expérience approfondie de l'écosystème Adobe et de récents accords avec des entreprises spécialisées et régionales pour commercialiser et servir conjointement les entreprises de taille moyenne.

Précautions

- **Prix et emballage** : la stratégie d'emballage des produits d'Adobe déroute certains acheteurs CDP. Cela est particulièrement vrai pour les prospects et les clients qui envisagent d'adopter pleinement plusieurs applications natives d'Adobe Experience Platform (c'est-à-dire Journey Optimizer et Customer Journey Analytics) afin de tirer le meilleur parti du CDP d'Adobe. Les dépendances entre produits ajoutent à cette confusion. Par exemple, Customer Journey Analytics propose des rapports et des analyses d'entonnoir plus approfondis que ce que propose le CDP seul.
- **Maturité du support** : les clients d'Adobe Real-Time CDP recherchent une expertise et des conseils accrus, en particulier lors de la mise en œuvre. Les références clients ont indiqué que

les fournisseurs de services apprennent les outils et les capacités sur la base de cas d'utilisation, tout en développant leurs connaissances et leurs talents pratiques avec le CDP. 

- **Coûts des fonctionnalités supplémentaires** : deux modules complémentaires facultatifs au CDP d'Adobe (Privacy and Security Shield et Healthcare Shield) peuvent avoir un fort attrait et un fort impact pour les prospects des secteurs réglementés. Ces modules complémentaires entraînent un coût supplémentaire, calculé sur la base d'un pourcentage des dépenses totales de l'utilisateur pour les applications applicables.

Ampèreté

Amperity est un visionnaire dans ce Magic Quadrant. Sa solution d'identité basée sur l'IA a été commercialisée très tôt et fonctionne comme un identifiant client universel entre autres à mesure que davantage de données anonymes et pseudonymes sont ingérées. La base de données du CDP produit des informations et pilote l'activation grâce à une vue client unifiée. Ses opérations sont basées en Amérique du Nord, avec une présence en Europe et en APAC. Ses clients sont pour la plupart de grandes entreprises B2C du commerce de détail, du voyage et de l'hôtellerie. Il prévoit d'injecter davantage d'IA/ML dans le CDP, notamment dans l'ingestion de données, la normalisation et GenAI pour la découverte et la création de segments. Il investit dans l'interopérabilité et une architecture de gestion de données ouverte pour garantir l'optimisation des données la plus complète pour les projets de business intelligence et les canaux gagnés et payants.

Forces

- **Unification du profil client** : Amperity permet l'unification des profils à grande échelle grâce à une approche IA/ML multibrevetée avec correspondance probabiliste et déterministe. Son graphique de cluster d'identité est une illustration visuelle des enregistrements en double pour un profil client unique et un score de confiance indiquant les enregistrements appartenant probablement à un client. Cette aide au contrôle qualité aide à décider si une couche supplémentaire de correspondance déterministe native est nécessaire.
- **Création et tests de segments complexes** : l'interface utilisateur d'Amperity, destinée aux spécialistes du marketing techniques privilégiant une logique avancée dans la création et le ciblage de segments, est largement intuitive pour les utilisateurs non techniques. Il prend en charge la création de segments en créant automatiquement un tableau d'attributs client à intégrer dans les canaux d'orchestration. Il fournit des informations sur les projets de segments via un tableau de bord prédéfini, indiquant aux spécialistes du marketing dans quelle mesure les segments sont viables et comment ils sont susceptibles d'évoluer par rapport aux objectifs de la campagne.
- **Approche de validation de principe** : Amperity offre aux clients potentiels une expérience pratique avec une plateforme configurée pour leurs données client. La preuve de concept (POC) de 90 jours implique l'ingestion d'un sous-ensemble de données du prospect, y compris des informations personnellement identifiables (PII), des transactions et des interactions.

Précautions

- **La tarification évalue le risque de coût** : Amperity base les prix sur le nombre de profils uniques et les attributs et contextes associés, et non sur l'unité de tarification de calcul commune. Les profils stockés et les attributs associés étant des leviers de tarification, les clients développant des données de première partie plus riches verront les contrats gonfler proportionnellement à la richesse de ces données.
- **Ne convient pas au B2B** : Amperity propose des modèles de données personnalisés, un obscurcissement et une augmentation des données pour une variété de modèles commerciaux et d'industries. Cependant, les acheteurs B2B et B2B2C doivent noter son orientation prédominante vers le B2C, avec sa base de clients B2C à 99 %, et le manque de fonctionnalités B2B telles que la notation native des leads.
- **Gestion de la confidentialité et du consentement basée sur l'intégration** : bien que le CDP dispose de fonctionnalités natives de gestion de la confidentialité et du consentement, les clients utilisant leur propre plate-forme de gestion du consentement peuvent être confrontés à des défis d'intégration. Cela peut inclure une incapacité à signaler par programme la suppression des données des clients et les demandes d'accès des personnes concernées dans les magasins de données gérés via Amperity.

BleuConique

BlueConic est un Challenger dans ce Magic Quadrant. Sa plateforme de données clients BlueConic vise à unifier les données clients et à les rendre disponibles pour une utilisation facile par les spécialistes du marketing dans la segmentation, l'orchestration et l'activation. Ses opérations sont concentrées sur les Amériques et en Europe, avec près de la moitié de sa clientèle en Europe. Ses clients sont généralement des entreprises B2C de taille moyenne et d'entreprise, avec près de la moitié de ses clients dans le secteur de la vente au détail ou des médias. Sa feuille de route comprend des plans pour faire progresser son initiative de salle blanche de données en permettant l'activation directe des audiences à partir des salles blanches. Il prévoit également de lancer des modèles de données verticaux.

Forces

- **Priorité à la confidentialité** : avec une présence européenne significative, le CDP de BlueConic donne depuis longtemps la priorité à la confidentialité. Il s'agissait du premier système doté de fonctionnalités de gestion du consentement de bout en bout pour le RGPD. Les contrôles et fonctionnalités granulaires de confidentialité de son CDP incluent une fonctionnalité qui détermine la zone de législation d'un client pour aider les spécialistes du marketing à gérer le consentement et les préférences.
- **Marketer-first**: BlueConic's core tenant of platform usability is evident in its UI and UX. The segmentation tool is highly visual and no-code for easy marketer use. A nontechnical UI enables marketers to leverage OOTB predictive models. It has embedded GenAI capabilities in Dialogues, its CDP's native website personalization module, prioritizing ease of use with emerging technology.

- **Second-party data sharing:** With more than half of its customers in retail, consumer goods and media, BlueConic saw an opportunity to facilitate second-party data sharing in a neutral and privacy-compliant manner. It launched a data clean room in 2022, and while this hasn't reached broad applicability across customers, it's an opportunity for growth in this advanced use case.

Cautions


- **Focused strategy:** BlueConic's strategy remained stable in the past year, despite new technologies impacting the CDP priorities of Gartner clients and many vendors in this research. Gartner clients are prioritizing interoperability with IT-owned data warehouses in ways that require new packaging and data management innovations. Although BlueConic has a track record of continuous innovation, it may not be a fit for buyers with more complex data infrastructure or concerns about data replication.
- **Smaller footprint with large enterprises:** BlueConic focuses on midmarket customers, resulting in a smaller large enterprise footprint than other vendors evaluated. Less than 30% of its customer base represents organizations with annual revenue over \$1 billion, compared to 43% on average among vendors evaluated that disclosed this.
- **Small partner ecosystem:** BlueConic lacks the global partner scale of many other vendors evaluated, making it difficult to find implementation partners experienced with its CDP. It remains focused on documenting and expanding the foundational aspects of its partner program, instead of strategically leveraging a vast network to win new and support existing customers.

Blueshift

Blueshift is a Niche Player in this Magic Quadrant. Its activation-centered CDP focuses on unifying data for personalized campaign automation and media management. Its operations are focused in North America and Europe, and its clients are mainly midsize B2C media, retail, and financial services and insurance organizations. Its marketing-friendly interface focuses on workflow and management capabilities suited to channel optimization and orchestration. Its Recommendation Studio personalizes recommendations based on a content catalog or products by employing event-level user data. Its roadmap includes real-time integration with cloud data warehouses and extending GenAI accessibility and capability for marketing use cases.

Strengths

- **Retail, media emphasis:** Blueshift offers strong features for retail and media marketers, like its Recommendation Studio, which personalizes recommendations based on a brand's content catalog or products by employing event-level user data. Marketers with extensive product catalogs and a desire for personalized media execution who don't want separate CDP and multichannel marketing hub (MMH) solutions may benefit from this CDP.
- **Ease of use:** The user interface is accessible to nontechnical business users who are focused on personalizing experiences. Eighty percent of its users are nontechnical, with most serving in marketing and marketing operations functions. The company has recently made significant investments in simplifying its UI and UX, while providing a self-guided demo experience.

- **Marketing channel focus:** Blueshift's legacy of supporting the media operations of organizations focused on digital commerce with large product catalogs stands out for retail marketers with extensive needs for digital marketing execution. This requires investment in its Cross-Channel Marketing Hub. 

Cautions


- **Unclear product strategy:** Blueshift's platform expands beyond the definition of a CDP, and it includes features that facilitate cross-channel customer engagement and optimization. Some of these features have significant overlap with solutions that may already be in a martech stack, including personalization engines, MMHs or email service providers (ESPs).
- **Depth of product roadmap:** Blueshift showed limited vision in its product roadmap, emphasizing minor enhancements of existing features with little description of how those will be achieved. Buyers should consider this when planning their mid- and long-term martech strategies.
- **Limited third-party identity support:** Despite a focus on cross-channel optimization, the Blueshift CDP only supports deterministic ID stitching. It doesn't have a wide range of third-party ID partnerships, which makes deterministic stitching at scale exceedingly difficult. Clients may require more support for customer acquisition from their CDP than Blueshift is able to provide.

Dun & Bradstreet

Dun & Bradstreet is a Niche Player in this Magic Quadrant. Its D&B Rev.Up ABX includes the Lattice CDP and focuses on enabling B2B customers to unify, enrich and score hierarchical account data, and to activate audiences for account-based marketing campaigns. Its CDP customers are primarily midsize and enterprise B2B organizations in North America, with the majority from high tech and business and financial services sectors. It has focused on partnering to grow marketing activation and reporting capabilities and on developing AI-based scoring and ChatGPT capabilities to enhance segmentation query building and optimization. Future plans include SMS/messaging activation, journey analytics and real-time reporting APIs.

Strengths

- **Account-level aggregation:** Dun & Bradstreet, one of two vendors in this report with the highest percentage of B2B customers, is known for its proprietary D-U-N-S number, an industry standard for account hierarchies. The D-U-N-S hierarchy in combination with access to D&B's Data Cloud enables CDP users to aggregate lead and customer data to more than 500 million unique account records.
- **Account scoring and activation:** Its AI- and rule-based propensity and lead scoring refresh daily and enable segmentation prioritization using CDP attributes and conversion propensity modeling capabilities. Its UI enables sliding-scale selection of segments based on volume of accounts in each rating bucket. Connectors to MAP and CRM products – including Eloqua, Marketo and Pardot – facilitate B2B marketing activation of segments and better insights on buying signals and conversion propensity to sellers.

- **Implementation timelines:** D&B had the shortest implementation timeline of vendors in this research, with 100% of customers surveyed for this evaluation reporting implementations in less than three months and 84% reporting satisfaction with the CDP's ability to deliver on capabilities. Implementation typically includes data ingestion and aggregation, scoring in place, and marketing or sales plays activated and measured. 

Cautions


- **Market momentum and visibility:** D&B, one of three CDP vendors in this evaluation with the lowest 2023 contract volume, was mentioned less often by customer references when asked about competitive vendors considered. This could indicate a lack of marketing focus on competitive differentiators or misalignment of product capabilities with B2B CDP buyer requirements.
- **Marketing activation add-on dependent:** Activating the CDP with B2B marketing use cases leveraging account propensity and lead scoring models, intent data, and other services and capabilities comes with add-on pricing. This makes pricing overly complex for the offering and what B2B buyers need.
- **Data transformation reporting:** Rev.Up ABX users surveyed in this evaluation indicate a gap in analytics reporting insights to speed the identification and resolution of data transformation problems, leaving users lost in data without digestible insights that can be customized.

Leadspace

Leadspace is a Niche Player in this Magic Quadrant. Its Drive B2B CDP focuses on B2B target account and segment prioritization and planning by identifying high-potential prospects and market opportunities through propensity modeling, with buyers split equally between sales and marketing. Its operations are focused in North America, and its clients tend to be large enterprises from technology, hospitality and manufacturing. Its roadmap focuses on enabling fully autonomous campaigns and territory planning with NLP UI prompts and insights, an AI self-driven segmentation recommendation engine personalized for the user, and decisions and confidence scoring from multiple sources for profiling accuracy and data completeness.

Strengths

- **B2B sales-focused use cases:** While most CDP buyer profiles are from marketing, analytics and IT, Leadspace also focuses on assisting sales in accelerating revenue growth while expanding understanding of total addressable market potential. It has 80 OOTB target personas with those use cases in mind. It boasts capabilities to define and target buyers to grow their revenue pipeline, resulting in the highest revenue growth rate projected for 2023 of vendors evaluated.
- **Opportunity-based segments:** Leadspace's trademarked Revenue Radar propensity modeling is unique in enabling revenue profiling of TAM-to-opportunity and whitespace discovery for accounts and individuals. More than 30 data partner sources power its predictive opportunity scoring and deliver insights enabling targeting and prioritization of buyers most likely to convert and close.

- **Account-to-lead verification:** Leadspace Drive has native, social and email capabilities for multilevel verification and validation of master account-to-lead hierarchies. Leads collected through its smart forms are also matched, enriched, scored and routed typically to MAP or sales engagement systems in as little as three minutes at 10,000 leads per minute. 

Cautions


- **Services-dependent model:** First-party data is collected using predefined schemas through Leadspace API integrations with diverse sources, including MAP, CRM and DSP platforms, and through Leadspace SmartForms. Mapping of custom data structures beyond predefined schemas relies on a Leadspace services model that could delay data collection.
- **Marketing activation:** Leadspace does not support marketing activation functionality that is standard with other vendors, such as send time, customer journey design and optimization. But native app integrations with CRM, MAP and cloud data warehouse vendors are included, as is support for next-best-offer recommendation and geofencing capabilities.
- **Customer onboarding and enablement:** Leadspace customers indicate dissatisfaction with the use-case-driven onboarding and training videos, preferring a more direct approach based on their maturity level supported by Leadspace customer success teams. Those preferring a more digital onboarding experience may find fewer self-service options than other vendors offer.

mParticle

mParticle is a Niche Player in this Magic Quadrant. Its customer data platform focuses on helping brands with complex data needs manage customer data across their portfolio and channels. Its operations are mostly focused in North America, with continued expansion in EMEA and APAC. Its clients tend to be multichannel B2C brands in the media and consumer product verticals with a strong mobile presence. Its roadmap is a three-pronged strategy aimed at simplifying AI, becoming more architecture-agnostic (e.g., supporting zero-copy within a data warehouse environment), and enabling deeper access and visibility into the CDP's data flows for increased flexibility.

Strengths

- **Robust developer features:** In addition to marketer-friendly features in the UI, mParticle offers technical users powerful quality assurance and data monitoring features that amplify the support that IT can provide. For example, the CDP alerts users of implementation and data formatting errors. Technical users can access the development site to check configuration and see in real time how data is ingested and sent throughout the solution.
- **Recent acquisitions:** mParticle acquired the AI/ML personalization platform Cortex and the customer journey analytics platform Indicative in 2022. Acquiring the AI/ML platform suggests strong future AI momentum, which aligns well with its roadmap. The journey analytics component gives users access to valuable conversion funnel visualizations to analyze segment drop-off and create opportunities for reengagement. These investments make its CDP a more holistic option.

- **Predictive capabilities:** mParticle enables more transparent modeling and robust testing capabilities than other vendors evaluated. Journeys are based on multiple propensity models, and marketers can easily leverage OOTB predictive scores. 

Cautions

- **Pricing evolution:** mParticle launched a consumption-based pricing model in which customers estimate an upfront credit commitment to use toward a variety of features, such as warehouse sync or journey builder. Buyers could face challenges in modeling and monitoring costs in this structure, which is newer to the CDP industry. The legacy pricing model that uses monthly tracked users is still available if preferred.
- **Seeking parity on market trends:** While mParticle's roadmap includes newly emerging AI and data management capabilities, it is also seeking product parity with others in the market. Probabilistic identity resolution, native account aggregation for B2B customers and zero-copy integration with data warehouses are roadmap items that other vendors offer in their products.
- **Diluted focus areas:** Sixty percent of mParticle users are nontechnical. It intends to prioritize helping those users leverage AI within their existing workflows. mParticle's roadmap also highlights increasing developer-level access and visibility into the data for maximum flexibility and control, pulling the prioritization of roadmap items in different directions.

Oracle

Oracle is a Visionary in this Magic Quadrant. Its Unity Customer Data Platform is focused on enabling the unique customer data needs of a variety of B2B and B2C business sectors, including maintaining different profiles across the enterprise for each. Its operations are geographically diversified, and its clients tend to be an even mix of mid to large enterprise B2B and B2C organizations across a variety of industry sectors. It focuses on enabling faster time to value for vertical use cases. It has plans for more OOTB data models, generative and predictive AI capabilities for tasks such as segmentation and experience building, and integrations with third-party analytics and walled-garden advertising platforms.

Strengths

- **Extensible AI/ML framework:** Oracle's bring-your-own AI/ML model capability and 27 ready-to-use customer behavior intelligence models leverage the Oracle Cloud Infrastructure (OCI) Data Science framework. Its CDP offers OCI models for tasks like propensity-based segmentation and activation of real-time personalized customer journeys across CX and other applications.
- **Vertical market enablement:** Oracle's vertical capabilities enable faster time to market with data models designed for B2C, B2B, B2B2C and industry-specific verticals. It also includes privacy-compliant features impacting highly regulated industries with features like HIPAA compliance and dynamic consent and preference management capabilities.
- **Onboarding experience:** Oracle's onboarding offers a rich set of OOTB tools, including an easy-to-navigate UI, prebuilt data models, prebuilt trainable ML models for scoring use cases and an

administrative console for setup and user controls. Educational onboarding resources for end users, developers, administrators and trainers are available in various formats.



Cautions

- **Technical user dependencies:** Roughly 40% of Oracle's user base resides in the marketing function, which is well below the average of other vendors. A similar proportion of users come from roles such as privacy and compliance, data science and IT, indicating dependencies on technical users across functions.
- **Data warehouse integrations:** Oracle prioritizes ingesting data from enterprise data warehouses into Unity to support real-time AI/ML and scoring use cases within Oracle CX applications. Although Unity provides extraction, transformation and loading (ETL) upon data ingestion, and can schedule batch data exports to a multitude of destinations, real-time data sharing from the CDP back to a data warehouse is not supported.
- **Buyer enablement and deployment:** Customer references reported average deployment times ranging from four to eight months. While that is among the highest of vendors in this research, clients are seeing average deployment times decline in length compared to those experienced by early adopters. Lengthy deployments pose a time-to-value risk that clients should consider when evaluating implementation approaches and expected ROI from critical use cases.

Redpoint Global

Redpoint Global is a Niche Player in this Magic Quadrant. Its rg1 product consists of three modules: Customer Data Platform, Journey Orchestration and Real-Time Interactions. Its CDP is particularly tailored to buyers with complex infrastructure challenges or regulatory requirements (e.g., private cloud, data-in-place or composable deployments). Its operations are focused in North America and EMEA. Its clients tend to be large enterprises operating in retail, healthcare, financial services, hospitality and media. Its roadmap includes improved UX, automated data insights, and AI-driven data quality and identity resolution. Its roadmap plans to codify best practices across multiple industry verticals to drive increased speed to value.

Strengths

- **Speed to value:** The underlying strategy and development focus of Redpoint Global's CDP is on achieving a high and quick ROI for its clients. Recent enhancements and its roadmap point toward quicker data ingestion, additional vertical toolkits and codification of best practices.
- **Vertical toolkits:** Redpoint's guiding principles of fast implementations and high ROI have resulted in the development of vertical toolkits that go beyond the standard data models from other vendors evaluated in the market. Its toolkits include templates, reports and processes that can be utilized within clients' respective industries.
- **Data ingestion and unification:** Redpoint has a strong library of OOTB data connectors that can be used to develop unified profiles for future marketing segmentation and activation. The product can work through complicated infrastructure challenges.

Cautions

- **Demands on internal resources:** Implementation of Redpoint's rg1 may require marketing and IT resources involvement for long-term success. Maintenance of custom data connections requires technical skills and coding via a technical user interface.
- **CDP market presence:** Despite its longstanding presence as a vendor of enterprise customer experience solutions, Redpoint was not cited as frequently in customer references as other vendors evaluated in this research. In addition, the company was infrequently mentioned as a shortlist competitor for new business among vendors considered for this research.
- **Inconsistent features for global user base:** Redpoint has a strong global customer base. Data can be ingested and processed in any language; however, the CDP's user interface and documentation only currently support English and Spanish with no additions on its roadmap. Given its focus on time to value, prospective buyers in EMEA and APAC should critically assess customer onboarding and support materials' ability to meet global needs.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its Salesforce Data Cloud, a hyperscale data platform built on Hyperforce and integrated into the Salesforce platform, activates data across (and beyond) the Salesforce ecosystem. Its operations are geographically diversified, and its clients include B2B and B2C organizations. Enhancements include zero-copy data access with lakes and warehouses (e.g., Snowflake) and features to control and segregate data for profile unification, insights and other logical separations of business units and functions. Plans include GenAI for segmentation, prediction and activation, and data graphs to visualize data model objects to ensure users have the right data available for engagement and activation.

Strengths

- **Multicloud Salesforce customer capabilities:** Salesforce Data Cloud enables flexible interconnection among other Salesforce solutions like Sales Cloud, Service Cloud and Marketing Cloud to analyze and activate customer data in the Salesforce ecosystem. This addresses longstanding data management inefficiencies that may have required additional software or costly custom data transformation.
- **Commitment to ecosystem innovation:** Salesforce's clear plan to innovate its CDP and incorporate new technology is evident in its enhancements, like zero-copy data integration between Data Cloud and other platforms, and bring-your-own-model for predictive and generative AI extensibility with Einstein for engagement and activation.
- **Strong partner network:** Salesforce's partner network's global reach and ability to cater to clients of various sizes, geographies and industries offer rich service options. These include independent software vendor (ISV) partners to build solutions to enhance Data Cloud on the AppExchange, systems integrator (SI) partners to aid implementation and reseller partners.

Cautions

- **Uneven integration approach:** Salesforce aims to improve leveraging customer profiles across its applications or cloud-based data warehouses, with minimal investment in prebuilt connectors with other martech and data tools. But buyers with few or no Salesforce tools or with use cases requiring access to other applications may need a paid solution from its AppExchange or MuleSoft iPaaS.
- **Expertise requirement:** Data Cloud is positioned as a self-service CDP, offering a freemium option. But, it's a CDP within Salesforce's complex ecosystem. Buyers who aren't already Salesforce clients or who lack data talent may not benefit as much from Data Cloud as compared to customers using Salesforce products.
- **Confusing cost of ownership:** Salesforce's product strategy transformation from a marketing-focused CDP into the multifunctional Data Cloud makes estimating total cost of ownership difficult. It offers a profile-based pricing model or a consumption-based "credits" model with multipliers for workloads. The latter approach suits enterprisewide operations, but not business processes in marketing and other functions.

SAP

SAP is a Niche Player in this Magic Quadrant. Its CDP focuses 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 already have an SAP relationship. Its operations are geographically diversified and its clients tend to be large enterprises, with most in retail and consumer products. It has focused on integrations with Sales & Service Cloud, S4 transaction data ingestion and one-click integrations with Emarsys and Gigya (SAP CIAM and ECPM). Its roadmap includes industry-specific data models, AI/ML, workflows, journeys for specific industries and connectivity with Snowflake, Amazon Redshift and Google BigQuery.

Strengths

- **Integration with SAP's ERP:** SAP's unique position in the market is due to ERP applications that can drive incremental value. The bilateral synchronization between SAP applications allows for tighter coordination of buying and ticketing throughout its application ecosystem. Its roadmap focuses on increasing integrations with other SAP platforms and data sources.
- **Partner support:** SAP boasts a strong network of partners to assist with CDP implementation and maintenance and other SAP applications. It also offers to enhance an organization's data through a vast network of partners and data vendors. It also maintains one of the strongest partner certification programs in the industry, which opens up potential clients to additional help when needed.
- **Integration with Gigya:** 2017, SAP acquired Gigya, a market leader in customer identity and access management (CIAM). It built its CDP on Gigya's CIAM infrastructure, which affords clients a consent-based approach to personalization across sales, service and marketing. Consent and privacy management has been an emerging area of importance to remain compliant with government and regulatory bodies. Gigya's infrastructure ensures that privacy and consent are considered throughout the CDP.

Cautions

- **New product offering:** SAP has ramped up production of new functionality and features since onboarding its first CDP customers in 2021, but remains behind other vendors evaluated. Its short-term roadmap focuses on industry accelerators, real-time integrations with cloud data platforms and more automated data mapping functionality for faster onboarding of new clients and data.
- **Market presence:** Gartner has seen minimal inbound inquiry related to SAP's CDP since its launch, and no vendors evaluated self-reported SAP as a competitor. SAP tends to cross-sell its CDP to an existing ERP installed base, resulting in limited market visibility.
- **B2B capabilities:** SAP launched B2B functionality in late 2022 and began adding B2B clients to its current B2C-heavy client base. Its roadmap focuses heavily on B2C functionality that will benefit the bulk of its current customer base. B2B prospects should carefully assess the CDP and future roadmap to ensure that they are a good fit.

Tealium

Tealium is a Leader in this Magic Quadrant. Its Customer Data Hub platform focuses on collecting, automating and securing first-party data for use in real time by downstream applications. Its operations are mostly focused in North America, EMEA, APAC and Japan, and its clients tend to be large enterprises across a diverse range of business models and industries. Its longevity as a solution helping marketers manage complex data needs has also made it a contending vendor in regulated industries. Its roadmap includes deepening integrations with cloud data warehouses and adding capabilities to better serve householding and account-based groupings of profiles for B2B use cases.

Strengths

- **Complex data and regulatory systems:** Tealium was early to market with a verticalized offering, starting with Tealium for Pharma, as it recognized the specific integrations and regulatory concerns involved with engaging healthcare providers and patients. It plans additional vertical approaches for the banking and automotive industries, identifying specific regulatory and vertical combinations that would benefit from a more specific solution.
- **Partner ecosystem:** Tealium has built a large partner ecosystem of global collaborators — agencies, management consultancies and systems integrators — that support a variety of use cases. It has a strong vision for expanding those relationships. SIs play an integral role in its strategy, given its support of best-of-breed martech stacks and the need to integrate with customers' existing technology stacks.
- **Market neutrality:** Tealium's heritage in tag management (Tealium iQ) and its more than 1,300 OOTB connectors make integrations a core differentiator and success factor in maintaining vendor neutrality. This neutrality across the martech and adtech ecosystems makes the solution a good option for marketers pursuing a best-of-breed martech stack.

Cautions

- **Confusing modularity:** Tealium's Customer Data Hub consists of three main modules to enable interoperability for customers who may only need parts of the solution. It also offers many customizations, including modules for data storage and analysis, predictive ML and customer data preprocessing. This modularity creates a complex buying scenario and can cause customer confusion around which modules are critical for success.
- **B2B capabilities:** Despite 10% of Tealium's customer base falling into the B2B business model, B2B capabilities remain rudimentary in its Customer Data Hub. Customer references were only somewhat satisfied with its ability to support account-level aggregation and ABM.
- **Inconsistent customer experience:** Users of Gartner's client inquiry service and customer references indicate reviews for Tealium are mixed, with some raving about its support while others want more communication and expertise about product capabilities and future roadmap. While it offers customer programs and services to facilitate CDP deployment, some of these are offered at an additional cost outside of licensing.

Treasure Data


Treasure Data is a Leader in this Magic Quadrant. Its solution can be packaged as a marketing CDP, with add-ons for service, sales or B2B demand generation functions. Its operations are mostly focused in North America and Europe, with a large Japan presence. Its clients tend to be large and medium-sized enterprises in tech, retail, manufacturing and consumer products. One substantial element of its product strategy is to simplify orchestration by unifying real-time decisions and triggers with batch campaigns for more intelligent journeys. It plans to leverage GenAI for data analysis and exploration and a unified journey management interface to select the optimal communications stream.

Strengths

- **Tracking open web advertising:** Treasure Data's longstanding capability to track open web advertising often drives global consumer products companies seeking to manage a combination of PII-based and pseudonymous audiences. It supports data clean room use cases that anonymize data across sources to power attribution and marketing mix modeling.
- **Cross-CRM customer profile:** Treasure Data's vision for connected customer experiences is to be an operational system that can integrate with the martech stack, cloud data warehouses, and systems for sales and service. This allows customer profile data to be accessed and actioned for nonmarketing use cases.
- **AI framework:** Treasure Data's implementation of AutoML powers OOTB analytics and attribution modeling, as well as predictive segmentation and next-best-offer, content and channel recommendations for clients without in-house data science capability.

Cautions

- **Reliance on technical users:** Tension exists in Treasure Data's CDP between highly configurable modules dependent on professional developers and no-code UI elements. Its data collection and profile unification are highly configurable through code-based developer workflows, which

marketing teams with scarce technical resources might find limiting. Graphical interfaces to these technical areas are planned. 

- **Real-time capabilities:** Treasure Data's journey orchestration vision is to unify batch and triggered strategies into a single set of workflows and decisions, but the product falls short of client expectations. Customer references noted needed improvement to real-time capabilities for segmentation and in-session decisioning to avoid supplemental personalization or multichannel marketing tools. Prospective buyers should confirm that the product can serve their use cases.
- **Shift to large enterprises:** At the time of this evaluation, Treasure Data reported that an equal share of its customers are organizations with less than \$50 million in revenue and over \$1 billion, representing an eclectic mix with diverse needs. Although it has a strong financial position, Treasure Data's customer retention rate is among the lowest of evaluated vendors, reflecting in part an intentional shift to target Global 2000 organizations, deprioritizing smaller customers and those in the APAC plus Japan region.

Twilio

Twilio is a Visionary in this Magic Quadrant. Its Twilio Segment CDP consists of Connections (data management), Unify (profile unification and attribute management), Protocols (data governance) and Engage (journey orchestration). Its four options to package these modules build upon each other. Its granular data management and profile unification controls benefit more technical marketing teams. It did not provide information about client geographic distribution or enterprise size, although just over half are B2C. It plans on continuing pursuit of a composable CDP to emphasize modular components of a product solution. It also plans to continue investing in AI development while expanding partnerships with cloud data warehouses.

Strengths

- **Roadmap vision:** Twilio's innovation vision includes recent product enhancements that emphasize GenAI, like its CustomerAI Predictions feature that allows marketers to predict CLTV and likelihood to churn, among other metrics. Planned innovations include continued development of composable CDP features and improvements to its real-time zero-copy architecture.
- **Large partner network:** Twilio's partner network consists of more than 1,400 SIs and ISVs, as well as platform partners (e.g., AWS, Google, Meta, Snowflake). The ecosystem has global reach with adaptable specialties across industries and verticals.
- **Use-case-based sales process:** In both its GTM approach and how it supports current clients, Twilio has a sophisticated, well-considered understanding of its clients' use cases that is tailored to a client's specific needs. Its sales process ensures that customers get value by aligning to client needs, a strength reinforced in customer references and Gartner Peer Insights reviews.

Cautions

- **Technical expertise:** Because Twilio emphasizes data management and unbundling product features as a composable CDP, Twilio buyers are primarily technical marketers or those who report to the CIO, CDAO and chief product officer. Its users are nearly evenly split across marketing and other functions.
- **Complex packaging:** Twilio's CDP is sold as multiple modules that build upon each layer; Connections/Unify (data management), Unify Plus (profile unification and attribute management), Engage Foundations (journeys and audiences) and Engage Premier (multichannel marketing hub). The Protocols offering (data governance) is available as an add-on. It underscores its vision for a composable CDP, but the configurable packaging can increase the solution's complexity for buyers seeking to map product modules to their use cases.
- **Corporate turnover:** Twilio's corporate turnover has accelerated. Its late 2023 announcement to lay off 5% of its workforce included some GTM roles in support of Segment. After three layoffs in under two years and the departure of CEO and co-founder Jeff Lawson, uncertainty about how it will balance investor pressure with its product development vision has increased.

Zeotap

Zeotap is a Niche Player in this Magic Quadrant. Its CDP is enhanced by other Zeotap modules sold separately: Collect (data ingestion and unification), Audiences (audience builder), Symphony (real-time journey orchestration) and Destination (audience activation). It emphasizes economic returns of customer-centered data strategies through personalized experiences and multichannel orchestration. Its operations are mostly in Europe and South Asia, and its clients are midsize to large enterprises in telecommunications, media and retail. Plans include consolidating multiple brand-level customer views into a multibrand view and supporting nontechnical users in segment creation with text-to-code natural language processing.

Strengths

- **European-focused:** The German-based Zeotap developed technology for European businesses, including meeting security requirements like ensuring non-EU data isn't transferred. Its integrated consent functionality allows setting rules of a specific region and marketing channels, which are applied automatically to data processing and audience activation.
- **Flexible customer profile unification:** Zeotap offers a flexible rule-based approach to profile unification, allowing users to enact different stitching strategies to match specific use cases. For instance, it prioritizes known first- or third-party identifiers when targeting prospects, or combines multiple deterministic strategies to increase match rate. It natively includes a cookieless ID solution, ID+, allowing enterprises to continue one-to-one targeting based on a network of existing integrations with martech and adtech vendors.
- **Intuitive user interface:** Zeotap's intuitive user interface allows nontechnical users to easily import and transform data through the Collect module (sold separately as an add-on). This module intelligently matches data, flags mismatches and allows users to preview the data to help understand the relational data structure.

Cautions

- **Cost increases:** Zeotap's clients can choose the CDP's individual modules, and pay based on events. However, its net recurring revenue increased significantly faster than other vendors evaluated. While this may indicate growing platform adoption, buyers should plan to monitor product consumption against their specific use cases to continually evaluate progress against success metrics.
- **Deployment architecture:** Zeotap offers managed single-tenant deployment and private cloud deployment on Google Cloud for highly regulated industries or geographic data residency requirements. Gartner clients express a preference for their CDP to align with a specific cloud data platform based on enterprise IT investment or to leverage real-time data sharing. Buyers preferring other cloud platforms such as Microsoft or Amazon may not realize benefits of the rich support for regional data governance.
- **Narrow GTM strategy:** Zeotap has 150 OOTB connectors, below the average among vendors evaluated. Because of Zeotap's direct integrations with Google Cloud Platform and Snowflake, buyers whose enterprises are oriented to other cloud data warehouses may face increased complexity and resource requirements for customer data management.

Zeta Global

Zeta Global is a Niche Player in this Magic Quadrant. The Zeta Marketing Platform consists of the Zeta CDP as well as a DSP for activation and an ESP for messaging. It's a solution for marketing teams focused on coordinating first-party customer data with third-party Zeta Data Cloud interests to maximize media channel effectiveness. Its operations are primarily focused on North America, serving mostly B2C organizations (it doesn't identify clients by enterprise size). Its roadmap focuses on data connection and governance, identity and addressability, and forecasting and planning tools for marketing optimization experts. The roadmap also focuses on Zeta Opportunity Engine (ZOE), its GenAI assistant for task completion and insight generation.

Strengths

- **Advertising activation:** Zeta Global has unique calendaring and workflow capabilities that enable media management. In addition, it has a native DSP and partnerships with many widely adopted DSPs that allow users to extend the value of their data into an advertising environment. These features are beneficial for buyers with significant demands for media support and optimization.
- **Agencies and multibrand businesses:** Zeta Global's CDP solution is configurable for marketing and advertising agencies as well as multibrand organizations. The solution allows agencies to set up their own CDP while also providing a CDP instance to the agency's clients, streamlining the workflow for campaign creation and management.
- **Clearer messaging and positioning:** Zeta Global's recent efforts to clarify its value proposition and marketing messaging show significant improvements in its GTM strategy. Its efforts helped clarify its market position after years of shifting among multiple technology markets, including ad tech, digital marketing hubs, campaign management tools, ESPs and more.

Cautions



- **Unclear product strategy:** The Zeta Marketing Platform, which includes the CDP, has experienced multiple product iterations and a flurry of M&A over the years. This has made it difficult to discern the role that the CDP plays as a product within the company's broader, and somewhat opaque, approach to selling a "platform." It has also led to unclear product pricing and bundling.
- **Market presence:** Zeta Global's presence is heavily focused on North American customers. While it has a small presence across EMEA, Latin America and APAC, the extent to which the product can support the unique needs of these markets is unclear. For example, third-party data via the Zeta Data Cloud is not yet available in EMEA.
- **Probabilistic identity resolution:** Despite an emphasis on advertising activations, which often require pseudonymized data, the Zeta Marketing Platform's native, deterministic dataset requires users to engage managed services for probabilistic identity resolution. Prospective buyers should consider this if programmatic advertising on the open web is their primary use case.

Inclusion and Exclusion Criteria

This Magic Quadrant research identifies and analyzes the most relevant providers and their products in a market as of 28 August 2023. The inclusion criteria represent the specific attributes that analysts believe are necessary for inclusion in this research.

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.
- 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, CDP software 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 account level for B2B or 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.

The vendor is required to meet one of the following (reported as constant currency):

- At least \$75 million in software license revenue from the CDP product in calendar year 2022, or
- At least \$50 million in software license revenue from the CDP product in calendar year 2022 and 20 new clients (logos) in production with the CDP product when compared to calendar year 2021, or
- At least \$25 million in software license revenue from the CDP product in calendar year 2022 and 30 new clients (logos) in production with the CDP product when compared to calendar year 2021.
 - **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 attributable to software, either SaaS/Subscription revenue or new license sales (on-premises).
- Greater than 60% of company CDP revenue must come from clients located in North America and EMEA.
- Rank among the top 25 organizations capturing 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

Simon Data failed to meet the inclusion criteria, as it did not achieve the minimum required thresholds of at least \$25 million in software license revenue from the CDP product in calendar year 2022 and 30 new clients (logos) in production with the CDP product when compared to calendar year 2021. 

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 and skills. This can be offered natively or through OEM agreements/partnerships as defined in the Market Definition/Description and detailed in the subcriteria. Vendors are evaluated on execution of the functionalities noted above in the Inclusion and Exclusion Criteria section.

Overall Viability: An assessment of the vendor's overall financial health, as well as the financial and practical success of the business unit. This includes the likelihood of the vendor continuing to offer and invest in the product, as well as the product position in the current portfolio. Vendors are evaluated on profitability and growth, customer growth and retention, and evidence of R&D investment.

Sales Execution/Pricing: The vendor'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. Vendors are evaluated on support for the presales process, understanding of typical buyer and user personas, understanding of typical implementation approaches, and information on pricing models and pricing flexibility.

Market Responsiveness and Track Record: 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. Vendors are evaluated on how customer needs are considered in developing product updates, information about customer success programs and the ability for clients to deliver measurable ROI on their technology investment.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the vendor'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. Vendors are evaluated on market visibility in the geographic markets they serve.

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

Operations: The ability of the vendor to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the vendor to operate effectively and efficiently. Vendors are evaluated on operational health and the ability to deliver for customers consistently and efficiently, including via professional services.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (February 2024)

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: Ability to understand customer needs and translate them into products and services. Vendors should show a clear vision of the market – listen, understand customer demands and shape or enhance market changes with their added vision. Vendors are evaluated on their understanding of current and emerging trends, client priorities and specific needs in the CDP market; planning should address specific market conditions and specific examples of how the vendor addresses key issues facing clients.

Marketing Strategy: Clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements. Vendors are evaluated on their assessment and plan to improve/solidify market visibility, product/service bundling that meets customer needs, messaging that clearly differentiates their position in the market, and an understanding of and responsiveness to customer needs and expectations.

Sales Strategy: A sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service and communication, along with partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base. Vendors are evaluated on how they adapt sales strategy for customers of different sizes or levels of maturity – for example, with different needs – in addition to an understanding of their dedicated sales resources and information about their 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. Vendors are evaluated on their product roadmap, how their solution meets critical client needs, how successful implementation is achieved, how they develop new approaches to address specific issues/client demand, and integration/ecosystem partnerships with third parties.

Business Model: The design, logic and execution of the vendor's business proposition to achieve continued success. Vendors are evaluated on the significance of their CDP product to their overall business and any key partnerships or M&A strategies.

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. Vendors are evaluated on vertical/industry-specific product roadmaps/partnerships.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes. Vendors are evaluated on innovation for differentiation, 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. Vendors are

evaluated on any region-specific partnerships to support locations and product capabilities that support the unique needs of customers in various regions.



Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (February 2024)

Quadrant Descriptions

Leaders

Leaders in this Magic Quadrant demonstrate the ability to satisfy the core use cases of customer data platforms for large enterprises. They have depth of expertise across a variety of industries, including the ability to serve the unique needs of some via OOTB models or compliance with regulations (e.g., GDPR, HIPAA). Leaders have evolved beyond the “table stakes” capabilities of providers in this market and have embraced a mid- and long-term view of the market. Many have clear innovation mandates and impressive, potentially disruptive product roadmaps – all while helping clients realize the advantage of these innovations at present.

Challengers



Challengers in this Magic Quadrant excel with strong execution and product functionality, and have strengths that serve a few use cases in the Critical Capabilities evaluation well. At the same time, they lack some of the industry and large enterprise exposure common to the Leaders in this evaluation. A Challenger's product roadmap doesn't expansively address the dynamic, emerging issues that marketers require. Challengers focus on established clients' needs for multichannel marketing functions and strategic direction, rather than setting a visionary pace with potential requirements.

Visionaries

Visionaries in this Magic Quadrant are defined by product roadmaps that embrace potentially disruptive innovations that have yet to be realized. Their ambition to deliver emerging and/or advanced functionality is industry-leading, with innovations like highly configurable identity resolution and identity-matching rules, unique strategies for client verticals and industries, and data warehouse integrations. But their Ability to Execute may be minimized due to their focus on capabilities that are more advanced than some of their customer and prospect base can use.

Niche Players

Niche Players in this Magic Quadrant embrace a narrow view of the market, which makes their technology a fit for very specific verticals or business models. They may also be in use as part of existing enterprise technology agreements. CDP vendors in this quadrant met parity with basic requirements of a CDP, including data collection, profile unification and activation. Few demonstrated a mid- or long-term view of disruptive innovation in this market. Customers of vendors in this quadrant adopt a CDP to fit a niche capability, such as ABM features, media orchestration or mobile activation.

Context

As the CDP market has reached a state of commonly accepted capabilities, vendors in this research were evaluated based on their ability to demonstrate a mid- and long-term view of the market. This includes how they plan to develop features in a dynamic, ever-changing market that is heading toward consolidation and market contraction. Existing capabilities are increasingly table stakes and provide limited opportunity for differentiation. As a result, buyers use indicators of how CDP vendors respond to changes in the market, such as their ability to innovate. Buyers also consider a vendor's viability, current performance and whether that performance is likely to continue.

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

Market Overview

Vendors Must Focus on Helping Clients Realize the Value of Technology

This Magic Quadrant debuts at a confusing time for the CDP market. There have never been more options for buyers, and there have never been more ways to realize value from unified customer

data.



We've seen sustained year-over-year interest from clients in how CDPs factor into a marketing technology roadmap and, increasingly, how they factor into enterprise customer data management architectures. The average CDP deal size for vendors evaluated in this research is up 82% compared to 2019. But the lure of CDPs may have peaked after years of increasing interest (see [Power Up Your Customer Data Technology Stack](#)). After a period of saturation, early evidence indicates that CDPs are a maturing market. In 2023, respondents reported deploying an average of 2.2 CDPs, ¹ down from 2.9 reported in 2022. ² As marketers' interest in these investment wanes, responsibility for tech investment is swinging back toward IT.

Consolidation is expected as the market settles with a stable number of viable providers, including "megavendors" with longstanding diversified offerings. Maturing markets tend to be buyer's markets, as buyers seek to consolidate architectures and eliminate redundancy (see [Martech Staples Face Consolidation as Privacy-Aware Data Solutions Bloom](#)).

Nearly half the vendors surveyed for this research indicated that they, too, see market consolidation on the horizon. Some are making plans for an "exit strategy," while others indicate that they're pivoting to a "composable CDP" value proposition, integrating with multichannel marketing hubs, or serving a majority of technical users for customer data mastering rather than activation. The influence of megavendors, a trend toward centralizing enterprise data storage, increased CDP modularity and low utilization are headwinds to a market undergoing significant change. The challenge for buyers, then, is appropriately predicting how these four different currents will lead to value over three- to five-year strategic planning cycles. For a CDP market that's about a decade old, that's essentially an eternity.

CDPs Evolve Beyond Marketing

Marketers have long used a variety of systems to design, orchestrate and measure multichannel campaigns. While many systems manage customer-level data and audiences for targeting, they present a challenge in data governance and orchestration across channels and competitive vendor solutions. The CDP, which debuted on the martech scene about a decade ago, aimed to address that challenge by collecting and unifying disparate customer data in a centralized location accessible to marketers. Soon, other functions that rely on the data, like sales and customer service and support, understood the allure of the technology, and the CDP frenzy commenced.

Interest from data management roles, IT and other customer-facing stakeholders is on the rise. A majority of vendors evaluated in this research noted that the constituency of the buying group for CDPs was more than 50% IT (e.g., including roles reporting into the CIO, CTO and CDAO). Indeed, more than three-fourths (78%) of organizations report centralizing customer data and systems under IT, reducing marketing's autonomy to strategize, fund, select, deploy and leverage specialized, marketer-centric technologies. ¹ These cross-functional buying groups arise as IT increasingly works to support multiple C-suite roles. Meanwhile, buying groups are asking tough questions about vendor capabilities to implement, scale and meet enterprise needs outside of

marketing. In a further curtailment of marketing's autonomy over technology choices, 78% of respondents say they must select solutions from preapproved vendors and platforms.



While CDP functionality is largely standardized, the growth in divergent stakeholders is causing CDP technology market segments to grow more pronounced. Vendors diverge into subcategories based on how their product focuses on meeting the use cases of diverse businesses (see [Critical Capabilities for Customer Data Platforms](#)). It's worth noting that none of those use cases are particularly IT-centric, yet IT has a big seat at the table in selecting the CDP.

Marketers should carefully parse the type of CDP project ahead of them. Determine whether the CDP is for marketing alone, for an IT-marketing partnership, or for all CX and related C-suite stakeholders. Regardless which department is the driving force for the investment, marketing needs to lead a coalition and ensure that its needs are met in the process.

Four Things Happened on the Way to a Sustainable Market

Gartner is only now launching a Magic Quadrant after the CDP market has standardized on a small number of core capabilities shared by all segments of the provider market. You might think this is CDP's moment of triumph, having finally won its place in the martech stacks of all midsize and large enterprises. Indeed, CDPs have achieved high penetration in martech stacks, with 67% of respondents to the 2023 Marketing Technology Survey reporting adoption. ¹ But four funny things happened on the way to a sustainable market.

First, large enterprise application providers (primarily CRM/ERP providers), or EAPs, saw the capabilities of a CDP playing to their benefit. These providers spent millions to acquire stand-alone marketing applications, and enterprise application providers realized that they'd often created their own data management headaches. These megavendors not only need unified profiles and governed data activation within their martech portfolios, but found that other business functions (e.g., sales, CX, finance, product) also need a robust source of customer profiles and the ability to activate other workflows within or outside of their overall product portfolios.

It's clear that the megavendors' strategy to provide unified customer data across enterprise functions is effective. Adoption of these "integrated" solutions has been rapid, the number of multi-CDP buyers is shrinking, and providers indicate that market consolidation is happening. This consolidation will lead to a settled state with a stable number of familiar, viable providers, including megavendors and integrated solutions as well as longstanding, diversified offerings.

But a second thing is happening on the way to consolidation: Enterprises are centralizing data storage and management. True, EAPs are capitalizing on this trend, but so are cloud data infrastructure providers, like Snowflake, AWS and Google. Buyers want to unify all enterprise customer data, not just first-party marketing data. And they don't just want it for business uses, they want it for back-office uses as well, like analytics and model development.

Composable CDPs and reverse ETL tools complement existing cloud data infrastructure investments, adding profile management, activation and governance to the storage and compute

already provided. The appeal of this approach leads to a third thing: Some independent CDPs launched modular deployment options that complement a separate data warehouse investment and mimic a packaged CDP application. The “solution” of a composable CDP, paired with the storage and compute of a cloud data warehouse, replicates the more common, full-stack CDP product. Now, large EAPs and customer data infrastructure providers aren’t necessarily in disagreement, as the development of zero-copy data and other federated compute innovations helped defuse the tension between packaged CDPs and DIY/modular options. For clients with mature data engineering and data science functions, this “composable CDP” solution aims to defray costs, reduce redundant data silos, and better serve the different needs of business and technical users.

Still, there’s a fourth thing: Business users aren’t really using their CDPs that much. Only 17% of marketers surveyed report “high utilization” of their CDP. ¹ When asked about the key technologies supporting journey orchestration, few business users put a CDP high on their list, despite how essential it is to the operation. Instead, marketers appear to be consuming these capabilities in other solutions, like their ABM platforms, marketing automation platforms (MAPs) and MMHs. These solutions do the work of marketing, making campaigns or journeys, optimizing current campaigns and journey interactions to drive revenue, and planning future or assessing past campaigns. Marketers see their CDPs as an enabling technology rather than a place where their work tasks are carried out.

Essentially, marketers don’t want better profile management. They want better revenue and results, and profile management is a way to get there. This has, in part, spurred the EAP providers and, importantly, the Smart Hub CDPs, the B2B-focused CDPs and some emerging MMH providers to embed CDP capabilities within existing marketing workflows, such as journey orchestration or demand generation. They may also come packaged with firmographics or account mapping data, consumer segmentation data, or identity graphs to increase the utility for these front-office workflows. The distinction between smart hubs and data integration CDPs becomes less relevant as smart hubs have either converted to MMHs or generalized toward becoming data integration CDPs. Instead, CDPs appear to be categorizing themselves based on the buyer segments they serve, competing either as EAPs or data specialists, and our former distinction of Smart Hub or Data Integration CDP is no longer valid.

Evidence

¹ **2023 Gartner Marketing Technology Survey:** This survey aimed to investigate the state of technology acquisition, adoption and use, including best practices for managing the technology stack, specific technologies in use and the degree of their adoption. It was conducted online from the end of May through June 2023. In total, 405 respondents were surveyed in their native languages across North America (n = 200), Western Europe (n = 173) and the Nordics (n = 32). Qualifying organizations reported enterprisewide annual revenue for fiscal year 2022 of at least \$100 million, with 80% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 39), insurance (n = 39), manufacturing (n = 41), consumer products (n = 38), retail (n = 39), travel and hospitality (n = 34), healthcare (n = 38), pharmaceuticals (n = 31), media (n = 34), tech products (n

= 34), and IT & business services (n = 38). All of the respondents were required to be senior decision makers, where the majority of their daily responsibilities mostly aligned with either business- or IT-focused marketing. Sixty-two percent of respondents were aligned with the marketing function, 18% with brand management, 11% with product marketing and management, 9% with customer experience, and 2% with IT or other functions.



² **2022 Gartner Marketing and Communications Technology Survey:** The purpose of this survey was to investigate the state of technology acquisition, adoption and use, including best practices for managing the technology stack, specific technologies in use, and the degree of their adoption. The research was conducted online from May through early June 2022 among 422 respondents, with 228 in North America (the U.S. and Canada), 159 in Western Europe (the U.K., Germany and France), and 35 in the Nordic region (Denmark, Norway and Sweden). Respondents were required to be senior decision makers, where the majority of their daily responsibilities are mostly aligned with either business- or IT-focused marketing (n = 324) or business- or IT-focused communications (n = 98). Seventy-eight percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 57), tech products (n = 37), manufacturing (n = 49), consumer products (n = 50), media (n = 40), retail (n = 56), healthcare (n = 52), IT and business services (n = 32), and travel and hospitality (n = 49). This research focuses on the 324 respondents aligned with marketing. Fifty-six percent of marketing respondents reported directly in the marketing function, and the remainder reported in the marketing and communications; marketing communications; brand management; customer experience; or product marketing and management function. Sixty-five percent of these respondents were solely responsible for making decisions related to marketing technology, while the rest were either a leader of or an advisor to the group responsible for making decisions on marketing technology.

Disclaimer: Results of these surveys do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor'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.

Market Responsiveness/Record: 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 vendor's history of responsiveness.



Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation : Agencements directs, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, défensives ou préventives.

Stratégie géographique : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques en dehors du « domicile » ou de la zone géographique d'origine, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, en fonction de cette zone géographique et de ce marché.



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