

IDC MarketScape: Worldwide Retail Customer Data Platform Software Providers 2025 Vendor Assessment

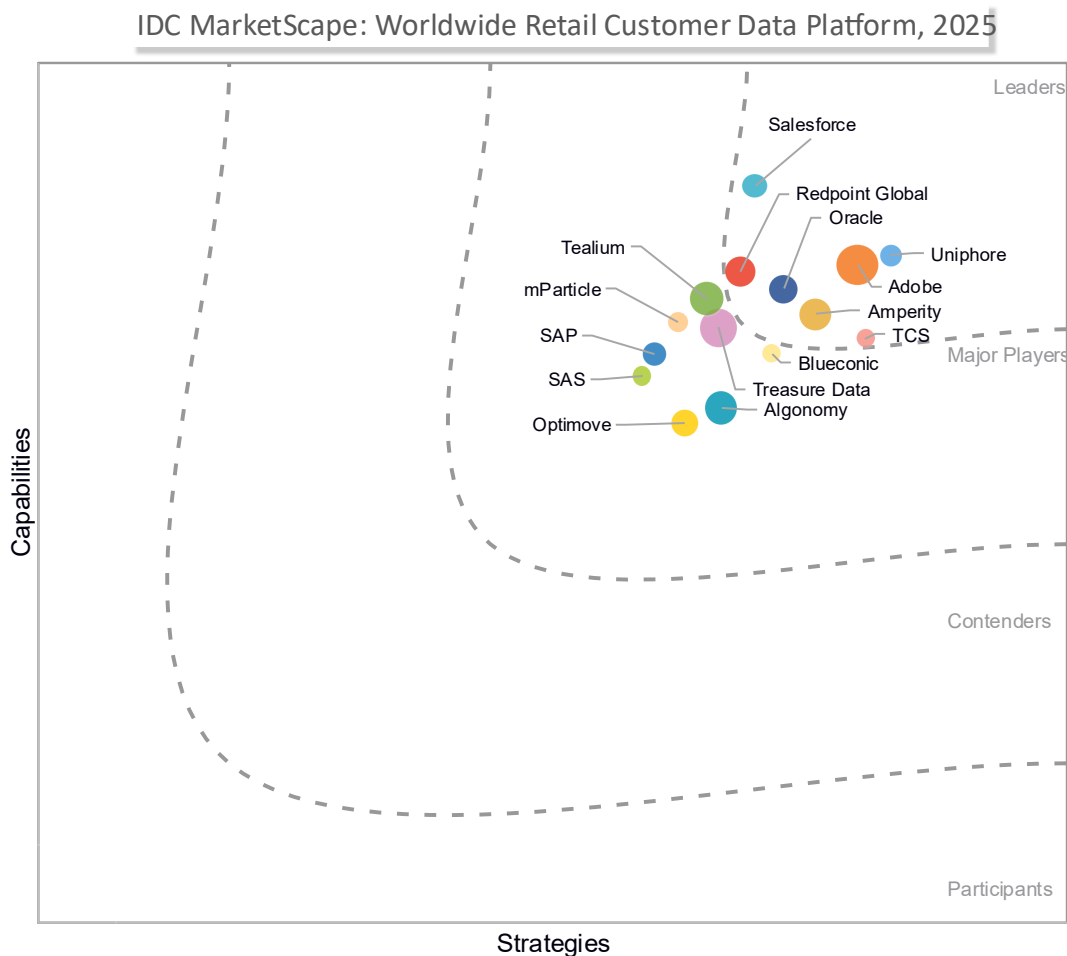
Ornella Urso

THIS EXCERPT FEATURES ADOBE AS A LEADER

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape: Worldwide Retail Customer Data Platform Software Providers 2025 Vendor Assessment



Source: IDC, 2025

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Retail Customer Data Platform Software Providers 2025 Vendor Assessment (Doc # US52040225).

IDC OPINION

Customer data is critical to omni-channel and intelligent retail, as well as customer-led business strategies. Retailers often manage large volumes of unstructured and fragmented data from various interfaces and business functions. Information from demographics, customer relationship management (CRM), loyalty programs, social media, and outdated personal data often remains disconnected or incorrect, hindering optimal use. Poor data quality poses risks across the retail value chain, affecting marketing, delivery services, loyalty programs, promotions, and stock management, with significant impacts on business processes and decisions.

IDC's analysis of retail IT spending, particularly regarding customer data platforms (CDPs), highlights key insights. In 2025, a significant portion of IT spending focuses on maintaining existing systems, compliance, and operational efficiency, influenced by economic and geopolitical uncertainties. Despite these challenges, IT spending in retail is expected to grow, driven by investments in ecommerce platforms, omni-channel strategies, and customer experience (CX) enhancements. Retailers leverage technology to meet evolving consumer expectations, improve supply chain efficiency, and gain insights through data analytics. CDPs serve as an operational layer that empowers customer-facing teams with actionable insights. This includes intelligent call routing, personalized service, and proactive outreach, all while respecting privacy boundaries. Moreover, with regulations such as GDPR and the California Consumer Privacy Act (CCPA) reshaping data practices globally, CDPs help ensure that customer data is collected, stored, and used in a transparent and compliant manner. They support features such as consent management, data access controls, and audit trails.

The retail sector increasingly relies on cloud-based solutions and hybrid strategies for data integration, scalability, and storage, enhancing operational efficiency and personalized customer experiences. Geopolitical issues such as tariffs and export controls pose risks to IT spending plans. Retailers adopt strategies to manage these risks while investing in technology for growth and competitiveness. This is clearly the case of leveraging AI to make CDPs working at best.

For instance, the synergy between CDPs and generative AI (GenAI) unlocks scalable personalization. CDPs provide the rich, real-time data GenAI needs to generate

dynamic content tailored to individual preferences, enabling brands to move beyond generic campaigns. There is also a strategic focus on leveraging AI for cybersecurity, data analytics, and customer experience enhancements despite rising AI costs. Within this context, retailers consider implementing a CDP to transform customer data management and enhance marketing efforts. A CDP consolidates data from diverse sources such as CRM systems, ecommerce platforms, social media, and in-store systems, creating a unified customer profile. This integration ensures customer data is accessible and actionable across all channels, facilitated by robust APIs and prebuilt connectors for seamless integration with existing marketing, sales, and analytics tools.

In today's fast-paced environment, real-time data processing is a significant advantage. CDPs enable retailers to respond swiftly to customer interactions and preferences, enhancing the overall customer experience. By harmonizing data from various systems, CDPs enable more targeted and personalized marketing campaigns, leading to better engagement and conversion rates. With a unified customer view, retailers can deliver more personalized and relevant experiences, significantly increasing customer satisfaction and loyalty. Access to comprehensive and harmonized data enables informed decision-making, which improves marketing strategies, product offerings, and overall business operations. In essence, a CDP is invaluable for retailers aiming to optimize customer data management and drive business growth by integrating seamlessly with existing systems and providing real-time insights.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors must comply with the following requirements to be considered for evaluation in this document:

- The vendor should have worldwide coverage. The provider demonstrates evidence of strong market penetration through direct presence and knowledge of U.S., EMEA, and Asia/Pacific business contexts. The provider must support global retailers in its activities and expansion across mature and emerging markets, across ecommerce and brick-and-mortar stores.
- The software provider must have relevant experience in retail industries in the broadest possible set of industry processes and segments. Providers with no relevant experience in retail, such as those with a low retail customer base (below 25% of their CDP customers) or retail market share, will not be included.
- Only software and specialty CDP providers are considered for this assessment.
- The vendor must support clients in designing, developing, installing, configuring, and maintaining the systems, applications, or platforms that run the business. It needs to deliver software solutions (and hardware, when

available) regarding the core components of the customer data platform (data layer, analytics layer, and activation layer). At the same time, the vendor needs to provide the following capabilities and related services: identity management architecture; single view of the customer data; integration and customer experience services; intelligent marketing analytics capabilities; and other technical requirements related to speed and scalability, connectivity, architecture, and operational costs. The provider must be able to deliver the platform as a cloud-first solution (with the possibility to deliver on-premises or as public, private, or hybrid cloud when necessary). The vendor also has the capability to provide AI foundations embedded in its CDP's core capabilities.

- The provider can fulfill or enrich its portfolio of capabilities through proven collaborations with external partners. In such cases, the provider must demonstrate its active role in supporting the client as well during the delivery of services provided by its partners.

ADVICE FOR TECHNOLOGY BUYERS

In the digital era, a customer data platform can significantly transform how organizations manage and utilize data. This IDC MarketScape includes potential technology partners that can support retailers along the critical steps of a successful CDP implementation, beginning with a thorough evaluation of your specific needs and goals. By clearly defining objectives — such as improving customer insights, enhancing personalization, or streamlining data management — retailers can effectively co-innovate their implementation strategy. As you explore solutions to support the execution of your customer data platform, it is essential to consider several factors to ensure successful implementation and maximize the platform's benefits. Retailers looking to implement a CDP should the following:

- **Evaluate your needs and goals.** Start by clearly defining what you hope to achieve with a CDP. Whether it is improving customer insights, enhancing personalization, or streamlining data management, clear objectives will guide your implementation strategy.
- **Assess your technology overlap.** Before integrating a CDP, review your existing technologies such as CRM systems and loyalty management tools. Integrating CRM and CDP provides a 360-degree view of customers by combining transactional data from CRM with behavioral data from a CDP, enabling personalized experiences. Identify overlaps to ensure the CDP complements rather than duplicates your current capabilities.
- **Focus on data integration.** A primary benefit of a CDP is its ability to merge data from various sources. Ensure that your CDP can effectively integrate data from both online and offline channels, as well as across different departments.
- **Prioritize customer-centric data models.** Choose a CDP that is built around a customer-centric data model. This will enable advanced analytics and

provide deeper insights into customer behavior, helping you tailor your strategies more effectively.

- **Separate marketing functions.** Avoid using the CDP solely as a marketing tool. Instead, segregate it from specific marketing operational functions to maintain its broader utility and effectiveness across the organization.
- **Leverage AI capabilities.** Utilize AI-supported features such as advanced search, product discovery, and recommendations. These tools can enhance the CDP's capabilities, providing more personalized and efficient customer experiences.
- **Plan for scalability.** Ensure that the CDP you choose can scale with your business. As your customer base grows and your data needs evolve, your CDP should be able to accommodate increased data volume and complexity.
- **Invest in training.** Equip your team with the necessary skills to effectively use the CDP. Training sessions and ongoing support will help maximize the platform's potential and ensure smooth integration into your operations.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each criterion outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Adobe

After a thorough evaluation of its strategies and capabilities, IDC has positioned Adobe in the Leaders category within this 2025 IDC MarketScape for worldwide retail customer data platforms.

Founded in 1982, Adobe is headquartered in San Jose, California, and currently counts nearly 70 offices in over 35 countries. Adobe's CDP product, Adobe Real-Time CDP was launched in 2019. It is powered by Adobe Experience Platform to aggregate data sources, unify profiles and use cases, and enables seamless collaboration and real-time data usage to enhance connected customer experiences in a single platform. Retailers can leverage deterministic device graphs to connect identities and create actionable profiles, enhancing customer insights and personalization. The recently launched CDP's data federation capabilities — called Federated Audience Composition — enable the use of warehouse data without having to directly ingest data from various data sources, providing a comprehensive view of customer behaviors and preferences while keeping data minimization practices in mind.

The platform includes audience targeting and activation features such as Real-Time CDP Collaboration, which facilitates data collaboration for advertising-specific use cases. Retailers benefit from AI-driven insights and generative AI for content

creation and audience segmentation, ensuring personalized customer experiences at scale. GenAI is integrated into AI systems through traditional predictive AI models, which refer to a library available for local audiences, and propensity modeling, which was recently enhanced by natural language audience creation and integrated with Firefly. Adobe's CDP enables retailers to assess the audience consent status and prevent data governance violations, ensuring secure and compliant data activation.

Adobe's CDP enhances customer engagement through flexible data access and comprehensive customer data management. Retailers can integrate online and offline data sources, enabling real-time personalization across multiple channels for known and unknown customer profiles. The platform supports B2B and B2C profiles, allowing for tailored marketing strategies that drive customer acquisition and loyalty. With features such as direct ingestion, data federation, and integration with external data warehouses, Adobe's CDP provides retailers with the tools needed to deliver dynamic and consistent customer experiences, ultimately improving key performance indicators such as revenue, retention, and marketing ROI.

Quick Facts About Adobe

- **Employees:** Over 30,000
- **Global reach:** Focusing on the U.S., Americas, Europe, and Asia/Pacific
- **Cloud:** Single tenant, multitenant, and cloud native
- **Pricing model:** A credit-based pricing system that includes subscription- and consumption-based licensing models
- **Retail use cases embedded into the platform:** Data unification and enrichment, streaming intelligent segmentation, customer acquisition, CRM and loyalty, measurement (via online and offline unification), trust and data privacy
- **Data clean room:** Provided as a native technology

Strengths

The company has developed an AI system for detecting anomalies. Retailers can monitor changes in audience composition and receive notifications directly within the AI system. The facilitates the experimentation and optimization for specific audience microsegments.

Adobe's Real-Time CDP Collaboration enables marketer-friendly data collaboration use cases. This investment confirms the company's focus on facilitating seamless collaboration between brands and publishers, encompassing zero- to third-party data, and ensuring data privacy and security.

Challenges

Lead time for value generation may be a challenge especially for multibrands and for very-large organizations that must deal with cross-functional collaborations and more complex implementation road map. Retailers that do not purchase comprehensive support may experience delays in realizing the full benefits of Real-Time CDP Collaboration.

Being an enterprise-grade product, Adobe's platform can be sometimes perceived as complex by marketers in terms of integration with existing third-party, external capabilities. This might require extra support in the implementation phase.

Consider Adobe When

The platform is particularly suitable for large retailers with customer-centric marketing strategy and personalization requirements. Adobe offers a solid CDP for retailers looking for marketing-related industry-specific use cases.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here, and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

Vendor footprint, depicted by the size of the bubble, is based on IDC Retail Insights' best estimates of the vendor revenue on a global basis for software related to the Retail Customer Data Platform.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through

structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores — and ultimately vendor positions on the IDC MarketScape — on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Data management is foundational to customer experience but remains challenging. According to IDC's *Industry Insights 2025 — Retail Survey*, 21% of retailers globally prioritize CDPs for executing personalized customer experiences, with 17% planning to implement them in the next two years.

A customer data platform is conceived as a key enabler for enterprises as well as small and medium-sized businesses that aim to aggregate, analyze, and activate real-time customer data from multiple sources. A CDP is a scalable technology that automates data connections; extracts, transforms, and loads processes; stores data persistently; and leverages AI and ML analytics. In retail, CDPs aggregate data and convert it into the same language, sourcing a single version of the truth. By doing so, CDPs aim to create a single-customer view for marketing and CX functions to define and coordinate a comprehensive engagement approach across all interfaces and interaction moments of the customer journey.

Related Research

- *Generative AI Use Case Taxonomy, 2025: The Retail Industry* (IDC #US53328825, April 2025)
- *IDC Perspective: Key Takeaways for CX and Loyalty from NRF 2025: Retail's Big Show* (IDC #US52807925, March 2025)
- *IDC Perspective: Moving the Goalposts: NRF 2025 Introduces Change* (IDC #US53227525, March 2025)
- *Do Luxury Retailers Excel in Delivering Superior Personalization?* (IDC #EUR153201725, February 2025)
- *IDC TechScape: Frictionless CX-Enabling Technologies in Retail, 2025* (IDC #US50024824, January 2025)
- *IDC Retail Insights' Global Retail Survey, 2024: Findings and Implication* (IDC #US51558623, November 2024)

Synopsis

The IDC MarketScape assesses worldwide retail customer data platform (CDP) software providers for 2025, emphasizing the importance of customer data in omni-

channel and intelligent retail strategies. Retailers face challenges with fragmented and unstructured data, impacting marketing, delivery, and stock management. Despite economic uncertainties, IT spending in retail is projected to grow, driven by ecommerce and customer experience investments. CDPs consolidate data from various sources, enabling real-time insights and personalized marketing. The report includes vendor profiles, assessing strengths and challenges, and provides guidance for technology buyers to optimize customer data management and drive business growth.

"Unlock the power of unified customer data to revolutionize retail strategies, enhance personalization, and drive growth in a dynamic market landscape," said Ornella Urso, research director, IDC Retail Insights, "Embedding AI — GenAI and even agentic AI — into a CDP platform enables retailers to gather reconciled customer profiles and contextualize data in real time while providing personalized experiences."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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