

Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023

May 2023



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- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
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- ▶ Google Cloud
- ▶ Healthcare Business Process
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- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Services Executive Insights™
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
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- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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01

Introduction and overview

- Research methodology
- Key information on the report
- Introduction
- Focus of the research

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary contractual database of over 680 experience-focused IT contracts (updated annually)

Year-round tracking of 35+ IT service providers and design agencies

Large repository of existing research in Interactive Experience (IX) services

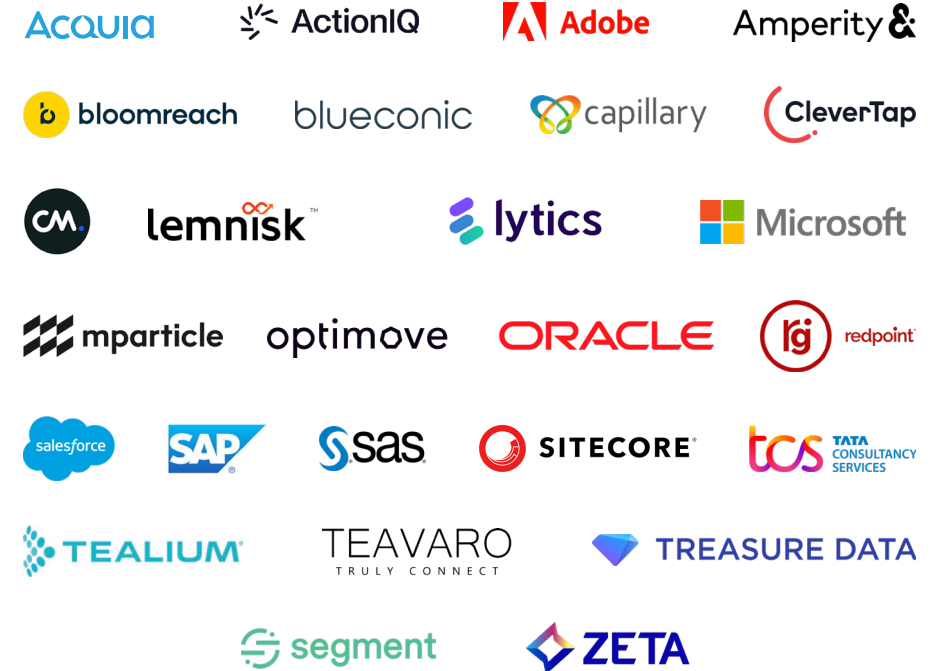
Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

This report is based on two key sources of proprietary information

- Proprietary database of IT services contracts of major IT providers with workplace services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including provider, contract type, TCV & ACV, provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
- Proprietary database of IT providers (updated annually)
- The database tracks the following for each provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed
- Provider briefings
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment
- Buyer reference interviews, ongoing buyer surveys, and interactions
 - Drivers and challenges for adopting workplace services
 - Assessment of provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Providers assessed^{1,2}



1 Assessments for Acquia, ActionIQ, Amperity, Bloomreach, BlueConic, Microsoft, mParticle, Optimove, Oracle, SAP, SAS, Sitecore, Treasure Data, Twilio Segment and Zeta Global excludes technology provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology provider public disclosures, and Everest Group's interactions with buyers

2 Assessment of RedPoint Global, Salesforce and Teavaro includes partial inputs from the technology provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, technology providers public disclosure, and Interaction with buyers

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion
Source: Everest Group (2023)

Introduction

The CDP landscape is evolving at a rapid pace. With conversations around the death of third-party cookies picking up steam, organizations are increasingly moving toward zero and first-party data making CDP, a vital tool in an organizations data ecosystem. The rise in the need for data-led real-time personalization along with loyalty and engagement is leading to an increased importance of CDP providers who are evolving their offerings with changing customer needs.

In this research, we present an assessment of 26 CDP providers featured on the CDP Products PEAK Matrix®, a comprehensive matrix that evaluates and categorizes technology providers in terms of their product capabilities and wider market acceptance.

To assess the overall capabilities of platform providers, we have delivered an in-depth analysis of their technology platforms.

The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2023, interactions with leading CDP providers, client reference checks, and an ongoing analysis of the CDP market.

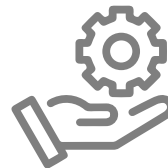
This report includes the profiles of the following 26 leading CDP providers featured on the Customer Data Platform (CDP) Products PEAK Matrix:

- **Leaders:** Adobe, Microsoft, Oracle, Salesforce, Tealium, and Treasure Data
- **Major Contenders:** Acquia, ActionIQ, Amperity, Bloomreach, BlueConic, Capillary Technologies, CleverTap, Lytics, mParticle, RedPoint Global, SAP, SAS, Sitecore, TCS, Twilio Segment, and Zeta Global
- **Aspirants:** CM.com, Lemnisk, Optimove, and Teavaro

Scope of this report



Geography
Global





























Providers
26



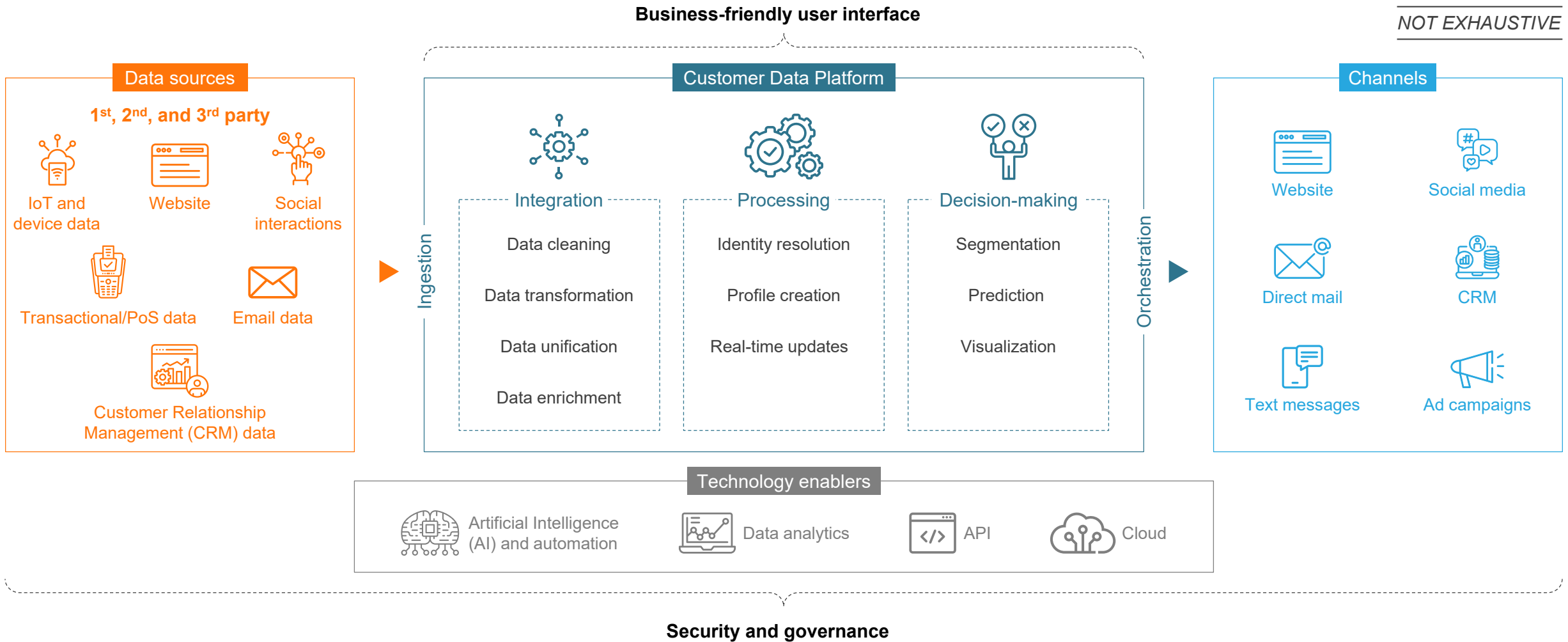
Products
Customer Data Platforms
(CDP)

CDP product brand names

	Acquia CDP
	ActionIQ CDP
	Adobe Real-Time CDP
	Amperity CDP
	Bloomreach Engagement
	Blueconic CDP
	Capillary CDP+
	CleverTap CDP
	CM.com CDP
	Lemnisk Hybrid CDP
	Lytics CDP
	Microsoft Dynamics 365 Customer Insights
	mParticle CDP

	Optimove CDP
	Oracle Unity CDP
	RedPoint Global rg1
	Salesforce Data Cloud
	SAP CDP
	SAS CDP
	Sitecore CDP
	TCS Customer Intelligence & Insights
	Tealium CDP
	Teavaro CDP
	Treasure Data CDP
	Twilio Segment CDP
	Zeta CDP+

Customer Data Platform (CDP) Products PEAK Matrix® Assessment | scope of the research



02

Customer Data Platform (CDP) Products PEAK Matrix[®] characteristics

- Summary of key messages

- PEAK Matrix framework

- Everest Group PEAK Matrix for customer data platform (CDP) products providers

- Technology provider capability summary dashboard

- Characteristics of Leaders, Major Contenders, and Aspirants

Summary of key messages

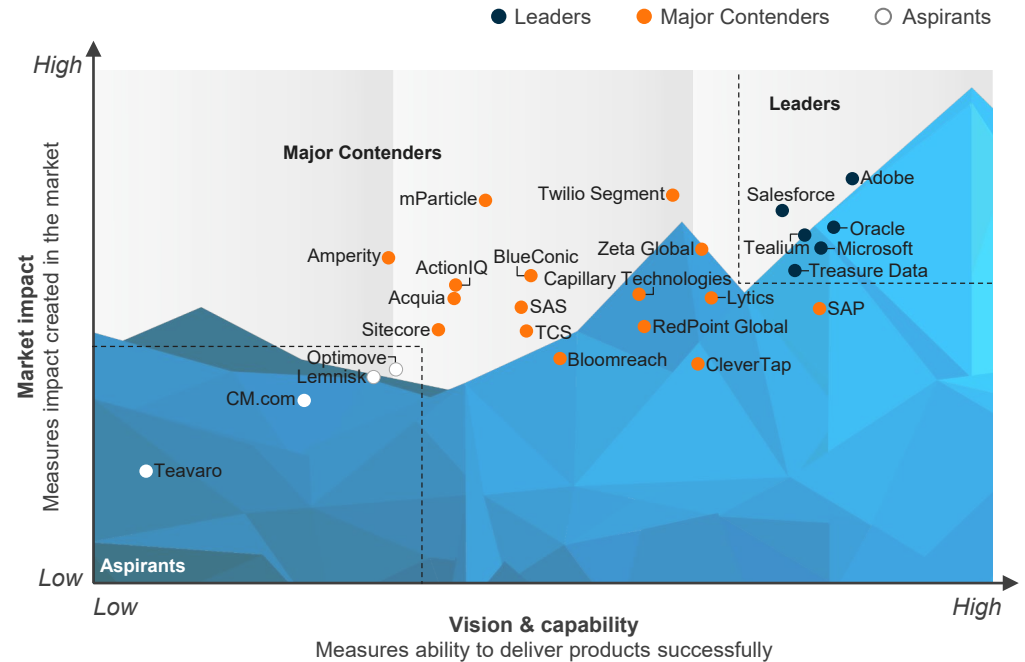


Everest Group PEAK Matrix® for CDP providers

Everest Group classified 26 CDP providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework to assess the overall vision, capability, and market impact of technology providers

- **Leaders:** there are six technology providers in the Leaders category – Adobe, Microsoft, Oracle, Salesforce, Tealium, and Treasure Data
- **Major Contenders:** there are 16 technology providers in the Major Contenders category – Acquia, ActionIQ, Amperity, Bloomreach, BlueConic, Capillary Technologies, CleverTap, Lytics, mParticle, RedPoint Global, SAP, SAS, Sitecore, TCS, Twilio Segment, and Zeta Global
- **Aspirants:** there are four technology providers in the Aspirants category – CM.com, Lemnisk, Optimove, and Teavaro

Everest Group Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023^{1,2}



- 1 Assessments for Acquia, ActionIQ, Amperity, Bloomreach, BlueConic, Microsoft, mParticle, Optimove, Oracle, SAP, SAS, Sitecore, Treasure Data, Twilio Segment and Zeta Global excludes technology provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology provider public disclosures, and Everest Group's interactions with buyers
- 2 Assessment of RedPoint Global, Salesforce and Teavaro includes partial inputs from the technology provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, technology providers public disclosure, and Interaction with buyers

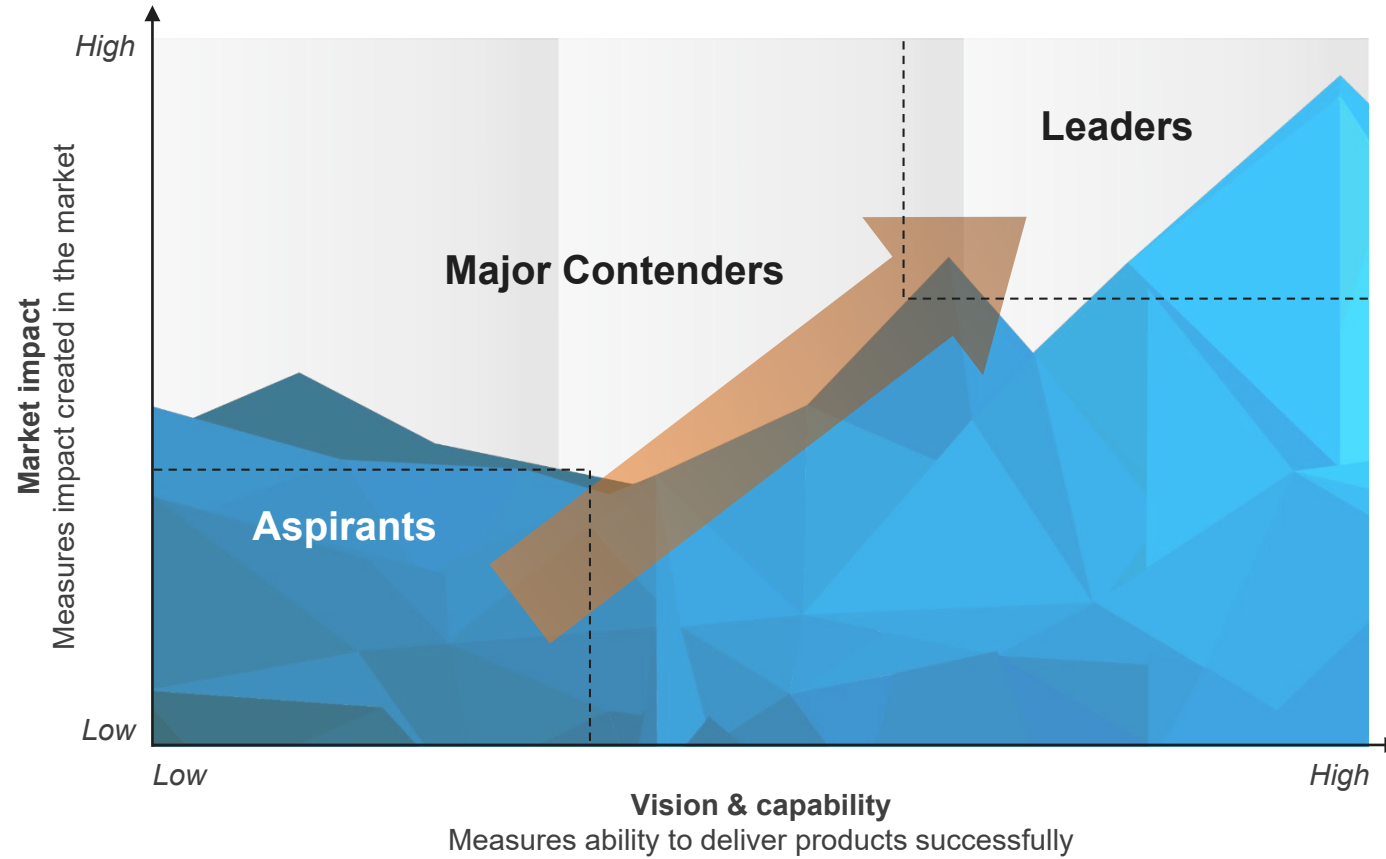
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion.

Source: Everest Group (2023)

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



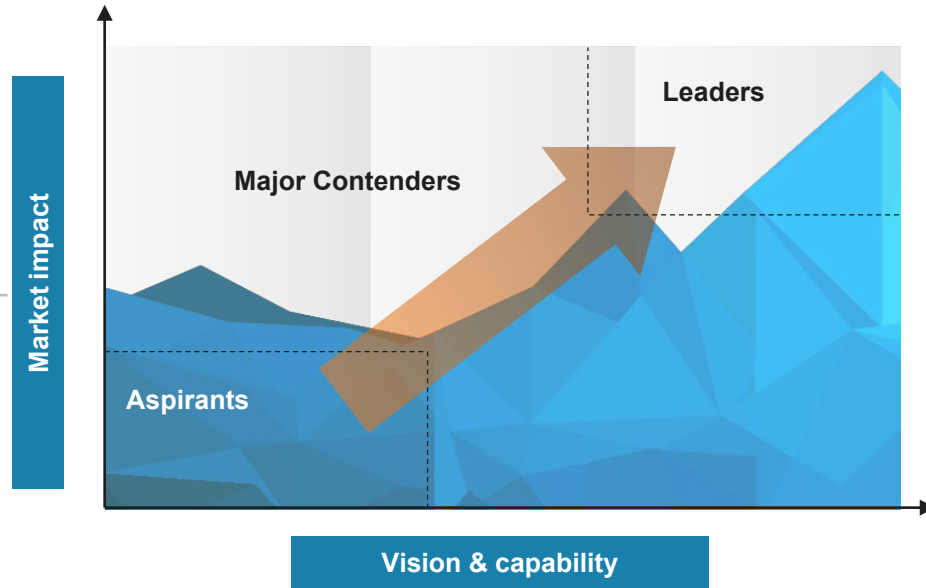
Everest Group PEAK Matrix



Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth
Portfolio mix
Diversity of client base across industries, geographies, environments, enterprise size class
Value delivered
Value delivered to the client based on customer feedback and other measures



Measures ability to deliver products successfully. This is captured through five subdimensions

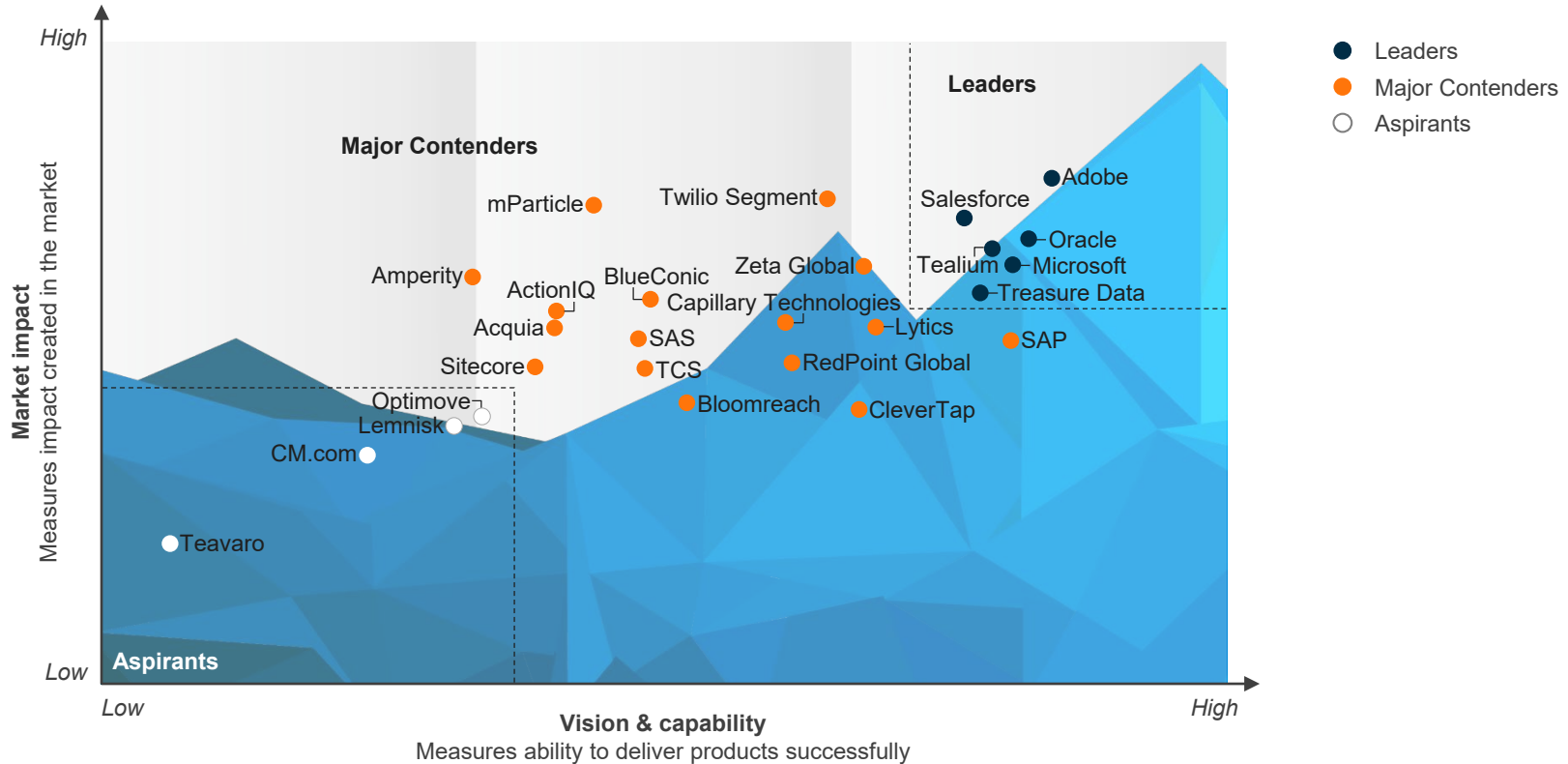
Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investments & support
Vision for the client and itself; future roadmap and strategy	Technical sophistication and breadth/depth across the technology suite	Configurability/customize-ability, hosting and tenancy, integration, governance, and security and compliance	Progressiveness, effectiveness, and flexibility of engagement and commercial models	Partnerships, acquisitions, talent initiatives, training, consulting, maintenance, and other support services

Everest Group PEAK Matrix®

Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023



Everest Group Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023^{1,2}



1 Assessments for Acquia, ActionIQ, Amperity, Bloomreach, BlueConic, Microsoft, mParticle, Optimove, Oracle, SAP, SAS, Sitecore, Treasure Data, Twilio Segment and Zeta Global excludes technology provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology provider public disclosures, and Everest Group's interactions with buyers

2 Assessment of RedPoint Global, Salesforce and Teavaro includes partial inputs from the technology provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, technology providers public disclosure, and Interaction with buyers

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Source: Everest Group (2023)

Customer Data Platforms (CDP) PEAK Matrix® characteristics

Leaders

Adobe, Microsoft, Oracle, Salesforce, Tealium, and Treasure Data

- Offers a wide variety of industry and domain-specific tools and use cases
- Offers a wide variety of integrations with various third-party players
- Offers strong integration with other internal products such as loyalty, automation, behavioral intelligence, and engagement solutions thus offering a one stop shop solution
- Strong focus on innovation and a clearly planned product roadmap with a focus on adding more integrations and offering end-to-end campaign and delivery capabilities
- Broader narrative on AI that is being used to augment core CDP capabilities and refine the predictive models
- Present ubiquitously across all major industries such as BFSI, manufacturing, retail, electronics, travel, telecom, media, and entertainment
- Strong partnership with leading technology providers enabling activation, delivery, and strengthening data sourcing along with a strong SI partner landscape supplemented by a presence in all the major geographies such as North America, Europe, and APAC

Major Contenders

Acquia, ActionIQ, Amperity, Bloomreach, BlueConic, Capillary Technologies, CleverTap, Lytics, mParticle, RedPoint Global, SAP, SAS, Sitecore, TCS, Twilio Segment, and Zeta Global

- Well defined narrative on core CDP capabilities such as data, analytics, identity, and campaign management
- Sharp focus on the core CDP offering targeted toward a defined customer segment such as mid-market and small enterprises
- Growing focus on building additional capabilities around media activation and use of AI to deepen capabilities on data, analytics, and customer identity
- Present in key industries such as BFSI, retail, telecom, media, and entertainment
- Important acquisitions being made to strengthen customer intelligence, identity resolution, and personalization capabilities

Aspirants





























































CM.com, Lemnisk, Optimove, and Teavaro

- Focus is on the core CDP offering targeted toward small enterprise customers
- Sharpened focus on a particular region or geography

Summary dashboard | market impact and vision & capability assessment of providers for Customer Data Platform (CDP) products

Leaders



























































































Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
Adobe										
Microsoft										
Oracle										
Salesforce										
Tealium										
Treasure Data										

Summary dashboard | market impact and vision & capability assessment of providers for Customer Data Platform (CDP) products

Major Contenders (page 1 of 2)







































































Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
Acquia										
ActionIQ										
Amperity										
Bloomreach										
BlueConic										
Capillary Technologies										
CleverTap										
Lytics										
mParticle										

Summary dashboard | market impact and vision & capability assessment of providers for Customer Data Platform (CDP) products

Major Contenders (page 2 of 2)









































Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
RedPoint Global										
SAP										
SAS										
Sitecore										
TCS										
Twilio Segment										
Zeta Global										

Summary dashboard | market impact and vision & capability assessment of providers for Customer Data Platform (CDP) products

Aspirants

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
CM.com										
Lemnisk										
Optimove										
Teavaro										

03











Enterprise sourcing considerations

- Leaders
 - Adobe
 - Microsoft
 - Oracle
 - Salesforce
 - Tealium
 - Treasure Data

Adobe

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Adobe’s CDP currently has a strong focus on catering to large enterprises
- Through a strong technology and SI partner landscape it has a strong and well-established global presence
- Adobe has its own inhouse professional services arm providing them strong implementation capabilities
- Clients appreciate Adobe’s willingness to customize the solutions and the number of integrations that they offer
- It has a strong focus on verticals such as BFSI, manufacturing, telecom, media, and entertainment
- Clients appreciate its dedicated B2B edition that enables account level insights
- It has multiple talent building initiatives such as bootcamps, community advisor programs, collaborative meetups, and industry events such as Adobe summit











Limitations

- Adobe’s CDP is viewed as a premium player with a high total cost of ownership, thus, making it less suitable for small enterprises
- Clients have highlighted that because of its narrative around an integrated CDP offering, Adobe is less suited for enterprises looking for specific use case-based implementations
- Clients have highlighted delays in implementation time as an area where Adobe can potentially improve upon

Microsoft

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Microsoft has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- Through a strong technology and SI partner landscape it has a strong and well-established global presence with its clients being present across the world
- It has strong focus on retail, distribution, and CPG along with healthcare and life sciences domains
- Microsoft has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing its personalization and customer segmentation capabilities
- It offers a strong integration with other Microsoft Dynamics 365 suite of products and benefits from a seamless integration with Azure Cloud











Limitations

- Microsoft's CDP can further benefit by focusing on other high-growth areas such as electronics, hi-tech, manufacturing, travel, telecom, media, entertainment, and BFSI
- It needs to improve its presence in the large segment clients in order to qualify as a true enterprise grade platform

Oracle

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Oracle has made heavy investments in creating complimentary offerings to its core CDP product such as Eloqua marketing automation, Infinity behavioral intelligence, CrowdTwist loyalty and engagement, Responsys campaign management, and BlueKai data management platform
- It has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing the data models, governance, and segmentation capabilities
- Oracle caters to enterprises of all sizes
- Through a strong technology and SI partner landscape it has a strong and well-established global presence
- It has a well distributed client presence across the globe and has strong focus on electronics, hi-tech, and the technology industries











Limitations

- Oracle's CDP can further benefit by focusing on other high-growth areas such as retail, CPG, and distribution
- It has further scope of enhancing its campaign capabilities, especially its abilities of dynamic content

Salesforce

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Salesforce’s CDP caters to enterprises of all sizes
- Through a strong technology and SI partner landscape it has a strong and well-established global presence with its clients being present across the world
- Its client portfolio is evenly spread across all the major industries such as BFSI, manufacturing, retail, telecom, media, and entertainment
- Salesforce’s acquisition of Evergage, a real-time web personalization engine, has added strength to its real-time, cross-channel personalization and machine learning capabilities
- It has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing its identity resolution and data retention capabilities
- Salesforce offers a strong integration with other customer 360 platform suite of products and benefits from a seamless integration with Salesforce CRM











Limitations

- Salesforce’s CDP has further scope of enhancing its identity matching capabilities by introducing support for probabilistic matching
- It has further scope of enhancing its data management capabilities especially its abilities of schema free data loading
- Recent rebranding of the CDP offering has led to some confusion in the minds of the buyer

Tealium

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Tealium has a very strong narrative on data management and analytics as a part of its CDP offering
- It is the largest independent CDP and caters to enterprises of all sizes
- Tealium has a global presence through strong technology and SI partner landscape. It has partnership with all the major SI providers
- It has a well distributed client presence throughout the globe across major industries such as BFSI, manufacturing, retail, healthcare, travel, transport, telecom, media, and entertainment
- Tealium has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing the consent and journey orchestration capabilities
- It has multiple talent building initiatives such as LIFT university, manager training programs, leadership programs, and tie-ups with employee training and coaching platform











Limitations

- Tealium has further scope of enhancing its product offering by introducing support for campaign features such as dynamic content, real-time messages and multi-channel campaigns
- It can also further enhance its identity management capabilities, especially its abilities of probabilistic matching

Treasure Data

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Treasure Data has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- It currently has a strong focus on catering to large enterprises
- Treasure Data has a strong presence in the APAC market
- It has strong focus on retail, distribution, CPG, manufacturing, telecom, media, and entertainment segments
- Through a strong technology and SI partner landscape it has a strong and well-established global presence
- It has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing the consent and journey orchestration capabilities

Limitations

- Treasure Data can further benefit by focusing on other high-growth areas such as BFSI and healthcare
- It can benefit by expanding its client portfolio in the high-growth markets such as North America and Europe

03

Enterprise sourcing considerations











- Major Contenders

- Acquia
- ActionIQ
- Amperity
- Bloomreach
- BlueConic
- Capillary Technologies
- CleverTap
- Lytics
- mParticle
- RedPoint Global
- SAP
- SAS
- Sitecore
- TCS
- Twilio Segment
- Zeta Global

Acquia

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Acquia’s CDP currently has a strong focus on catering to mid-sized enterprises
- It has strong presence in the North American market
- Acquia has a strong focus on retail with the majority of clients being CPG, FMCG, apparel, footwear & accessories, fashion, and personal care companies
- It has strong integration with its Product Information Management (PIM) and Digital Asset Management (DAM) products offering a complete marketing cloud
- Acquia has good talent development initiatives, such as the Acquia academy, which provides certifications, in-person trainings, and workshops
- It has a strong SI partnership landscape and partners with all the major SI providers











Limitations

- Acquia’s CDP can further benefit by focusing on other high-growth areas such as telecom, media, and BFSI
- It can benefit by expanding its client portfolio in the high-growth markets such as Europe and APAC
- Acquia has further scope of enhancing its campaign capabilities by introducing support for dynamic content
- It can work on building its data management capabilities, especially its abilities of client built and end-user data loading

ActionIQ

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- ActionIQ has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- It caters to enterprises of all sizes
- ActionIQ has a strong presence in the North American market
- It has a robust focus on retail, distribution, CPG, travel, transport, telecom, media, and entertainment segments
- ActionIQ has a strong narrative on acquisition marketing and is positioning its CDP as a viable replacement to clients' Data Management Platforms (DMP)











Limitations

- ActionIQ needs to enhance its technology and SI partner network to expand global presence
- It can benefit by expanding its client portfolio in the high-growth markets such as Europe and APAC
- ActionIQ can further benefit by focusing on other high-growth areas such as BFSI and manufacturing
- It needs to refine its overall talent strategy by providing on-demand learning and certifications to compete with peers

Amperity

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Amperity currently has a strong focus on catering to small enterprises
- It has a strong presence in the North American market
- Amperity has a strong focus on retail, distribution, CPG, and travel and transport segments
- Its acquisition of Custora, a customer intelligence platform, has added strength to its analytics and insights capabilities
- Amperity has multiple patents on data clustering, conflict resolution, data stitching, and version controlling
- It has a strong narrative on paid media activation and offers direct connectors to the ad ecosystem











Limitations

- Amperity has further scope of enhancing its product offering by introducing support for campaign features such as real-time messages and multi-channel campaigns
- It can benefit by expanding its client portfolio in the high-growth market such as Europe and APAC
- Amperity can further benefit by focusing on other high-growth areas such as BFSI, manufacturing, technology, telecom, media, and entertainment
- It needs to enhance its technology and SI partner network to expand global presence

Bloomreach

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Bloomreach’s CDP currently has a strong focus on catering to small enterprises
- It has strong presence in the North America and Europe markets
- Bloomreach has a strong focus on retail, distribution, CPG, and travel and transport segments
- It has a strong technology and SI partner landscape
- Bloomreach has a strong integration with its e-commerce and Content Management Platform (CMS) products offering a complete marketing cloud
- It has good talent development initiatives, such as the Bloomreach academy, which provides live training seminars and certifications with defined career paths











Limitations

- Bloomreach’s CDP can benefit by expanding its client portfolio in the high-growth markets such as Europe and APAC
- It can further benefit by focusing on other high-growth areas such as BFSI, manufacturing, technology, telecom, media, and entertainment
- Bloomreach needs to further develop proof points to have a robust product roadmap by focusing on industry- or domain-specific tools and use cases

BlueConic

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- BlueConic has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- It currently has a strong focus on catering to small enterprises
- BlueConic has a strong robust presence in the North American and European markets
- It has a strong focus on retail, distribution, CPG, and travel and transport segments
- BlueConic has a strong narrative on data clean rooms and the use of second party data to gain closed-loop attribution











Limitations

- BlueConic can benefit by expanding its client portfolio in the high-growth APAC market
- It can further benefit by focusing on other high-growth areas such as BFSI, manufacturing, technology, telecom, media, and entertainment
- BlueConic needs to refine its overall talent strategy by providing on-demand learning and certifications to compete with peers
- It needs to enhance its technology and SI partner network to expand global presence

Capillary Technologies

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Capillary Technologies has made heavy investments in creating complimentary offerings to its core CDP product such as Loyalty+, Engage+, and Insights+
- Its acquisition of Persuade, a customer experience company, has added strength to its CX strategy services, digital design services, and loyalty and design consultancy capabilities
- Capillary Technologies caters to enterprises of all sizes
- It has a strong presence in the APAC market
- Capillary Technologies has a strong focus on retail, distribution, CPG, and energy and utilities segments
- It has good talent development initiatives and offers organization-wide structured training and certifications programs for both internal teams and clients











Limitations

- Capillary Technologies can benefit by expanding its client portfolio in the high-growth markets such as North America and Europe markets
- It can further benefit by focusing on other high-growth areas such as BFSI, telecom, media, and entertainment
- Capillary Technologies needs to enhance its technology and SI partner network to expand global presence

CleverTap

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- CleverTap currently has a strong focus on catering to small enterprises
- It has a robust presence in the APAC market
- CleverTap has a strong focus on BFSI, healthcare, and life sciences segments
- Its acquisition of Leanplum and Patch, both mobile marketing platforms, has added strength to its presence in industries such as gaming
- CleverTap has a good product roadmap with a focus on strengthening the core CDP functionalities and enhancing its segmentation and recommendation capabilities
- It has a strong narrative on data ingestion and offers an inhouse database solution called TesseractDB
- Clients have appreciated CleverTap University, a learning platform for customers and partners, which provides information on the product, business use cases, and best practices to maximize value











Limitations

- CleverTap can benefit by expanding its client portfolio in the high-growth markets such as North America and Europe
- It can further benefit by focusing on other high-growth areas such as manufacturing, electronics, hi-tech, technology, telecom, media, and entertainment
- CleverTap needs to enhance its technology and SI partner network to expand global presence

Lytics

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Lytics has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- It currently has a strong focus on catering to large enterprises
- Lytics has a robust presence in the North American market
- It has a strong focus on BFSI, retail, distribution, CPG, electronics, and hi-tech and technology segments
- Lytics has a strong technology and SI partner landscape
- It has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing the analytics, and audience selection capabilities
- It has a strong narrative on composability, activation and reverse ETL











Limitations

- Lytics can benefit by expanding its client portfolio in the high-growth markets such as Europe and APAC
- It can further benefit by focusing on other high-growth areas such as manufacturing, telecom, media, and entertainment
- Lytics needs to refine its overall talent strategy by providing on-demand learning and certifications to compete with peers

mParticle

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- mParticle currently has a strong focus on catering to small and mid-sized enterprises
- It has a strong and robust presence in the North American market
- mParticle has a strong focus on retail, distribution, CPG, travel, transport, telecom, media, and entertainment segments
- Its acquisition of Vidora, a personalization platform and “Indicative” a customer journey platform, has added strength to its decisioning, segmentation, and personalization capabilities
- mParticle has a strong technology and SI partner landscape
- It has a strong narrative on AI-driven customer insights and has a dedicated tool for the same called Cortex











Limitations

- mParticle can benefit by expanding its client portfolio in the high-growth markets such as Europe and APAC
- It can further benefit by focusing on other high-growth areas such as BFSI and manufacturing
- mParticle has further scope of enhancing its product offering by introducing support for data management features such as schema-free data loading and identity management features such as probabilistic matching
- It can also grow its product offering by introducing support for analytics features such as manual and automated predictive models and campaign features such as dynamic content and multi-step campaigns

Redpoint Global

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Redpoint Global has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- It caters to enterprises of all sizes
- Redpoint Global has a strong presence in the North American market
- It has strong focus on retail, distribution, CPG, healthcare, life sciences, travel, transport, telecom, media, and entertainment segments
- Redpoint Global has a strong technology and SI partner landscape
- It has on-premises deployment capabilities
- Redpoint Global has a good product roadmap and has dedicated industry and domain-specific tools and use cases











Limitations

- Redpoint Global can benefit by expanding its client portfolio in the high-growth markets such as Europe and APAC
- It can further benefit by focusing on other high-growth areas such as BFSI, manufacturing, electronics, hi-tech, and technology

SAP

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- SAP has made heavy investments in creating complimentary offerings to its core CDP product such as customer identity and access management for B2B and B2C enterprises as well as enterprise consent and preference management products
- Its acquisition of Emarsys, a personalization platform, and Gigya, a customer identity and access management platform, has added strength to its profile management and personalization capabilities
- SAP has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and offering stronger integration with its other product offerings
- It has a strong focus on energy, utilities, and travel and transport segments
- SAP has a strong presence in the North American and European markets
- It has robust talent initiatives such as SAP learning hub, opportunity finder for internal recruitment, and employee career success center











Limitations

- SAP's CDP can benefit by expanding its client portfolio in the high-growth APAC market
- It can further benefit by focusing on other high-growth areas such as BFSI, healthcare, and life sciences
- SAP has further scope of enhancing its data management capabilities; especially its abilities of schema free data loading
- It can also further enhance its campaign capabilities by introducing support for dynamic content

SAS

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- SAS has made heavy investments in creating complimentary offerings to its core CDP product such as SAS data management, SAS 360 engage, and SAS 360 discover
- It caters to enterprises of all sizes
- SAS has a well distributed client presence across the globe
- It has a strong focus on BFSI, telecom, media, and entertainment segments
- SAS has on-premises deployment capabilities











Limitations

- SAS's CDP can further benefit by focusing on other high-growth areas such as manufacturing, electronics, hi-tech, technology, travel, and transport
- It needs to enhance its technology and SI partner network
- SAS has further scope of enhancing its product offering by introducing support for data management features such as schema free data loading and analytics features such as automated predictive models

Sitecore

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Sitecore CDP caters to enterprises of all sizes
- It has a strong presence in the APAC market
- Sitecore has a strong focus on BFSI, retail, CPG, distribution, and travel and transport segments
- It has strong integration with its CMS, DAM, and commerce products offering a complete marketing cloud
- Sitecore has a strong SI partnership landscape and partners with all the major SI providers











Limitations

- Sitecore’s CDP can benefit by expanding its client portfolio in the high-growth markets such as North America and Europe
- It can further benefit by focusing on other high-growth areas such as manufacturing, electronics, hi-tech, technology, telecom, media, and entertainment
- Sitecore needs to further develop proof points to have a robust product roadmap by focusing on industry- or domain-specific tools and use cases

TCS

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- TCS Customer Intelligence & Insights currently has a strong focus on catering to small- and medium-sized enterprises
- It has a strong data masking solution called TCS Mastercraft that integrates with the CDP for data cleansing
- TCS has a well distributed client presence across the globe
- It has a strong focus on BFSI, retail, CPG, and distribution segments
- TCS has good talent development initiatives and offers organization-wide training and certifications along with experience based technical and leadership programs
- It has a good product roadmap with a focus on strengthening the core CDP functionalities and enhancing its attribution and analytics capabilities
- TCS Customer Intelligence & Insights has on-premises deployment capabilities











Limitations

- TCS Customer Intelligence & Insights can further benefit by focusing on other high-growth areas such as manufacturing, hi-tech, technology, travel, transport, telecom, media, and entertainment
- It needs to enhance its technology and SI partner network
- TCS Customer Intelligence & Insights has further scope of enhancing its campaign capabilities especially its abilities regarding dynamic content

Twilio Segment

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Twilio Segment has a very strong narrative on data management as a part of its CDP offering
- It caters to enterprises of all sizes
- Twilio Segment has a well distributed client presence across the globe and has strong focus on retail, CPG, distribution, electronics, hi-tech, and technology industries
- It has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and offering stronger integration with its other product offerings such as Twilio Engage
- Twilio Segment has good talent development initiatives, such as the Segment academy, which offers on-demand courses and instructor-led training











Limitations

- Twilio Segment has further scope of enhancing its identity management capabilities, especially its abilities of probabilistic matching
- It can also further enhance its analytics capabilities, especially its abilities regarding manual and automated predictive models
- Twilio Segment has further scope of enhancing its campaign capabilities, especially its abilities regarding dynamic content

Zeta Global

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Zeta Global has a very mature CDP product offering and has deep capabilities across data management, identity management, analytics, and campaigns
- Its CDP caters to enterprises of all sizes and has a well distributed client presence across the globe
- Zeta Global has strong integration with its enterprise email and omnichannel marketing platforms and has a strong narrative on paid media activation
- Its client portfolio is evenly spread across all major industries such as BFSI, manufacturing, retail, CPG, distribution, telecom, media, and entertainment
- Zeta Global has a well-planned product roadmap with a focus on strengthening the core CDP functionalities and enhancing its forecasting and data warehousing capabilities

Limitations

- Zeta Global's CDP needs to further develop proof points to have a robust product roadmap by focusing on industry- or domain-specific tools and use cases
- It needs to refine its overall talent strategy by providing on-demand learning and certifications to compete with peers

03











Enterprise sourcing considerations

- Aspirants
- CM.com
- Lemnisk
- Optimove
- Teavaro

CM.com

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- CM.com’s CDP currently has a strong focus on catering to small enterprises
- Its acquisition of Tracedock, a first-party data collection service, and Building Blocks, a consumer AI technology provider, has added strength to its profile building capabilities allowing it to build more personalized communications and journeys
- CM.com has good talent development initiatives such as CM.com dev days, hackathon tie-ups training platforms, such as Udemy, and active participation in events such as Techorama











Limitations

- CM.com’s CDP can further build on its growth strategy by expanding presence beyond the European market
- Its presence in industries outside of telecom, media, and entertainment is limited. It can further benefit by focusing on other high-growth areas such as BFSI, retail, and manufacturing
- CM.com needs to enhance its technology and SI partner network to expand global presence
- It has further scope of enhancing its analytics capabilities and offer further integration with its existing product portfolio

Lemnisk

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Lemnisk has on-premises deployment capabilities
- It has a good product roadmap with a focus on strengthening the core CDP functionalities and enhancing its segmentation capabilities along with overhauling its UI/UX and enable running of both transactional and promotional messaging from the same platform
- Lemnisk has a focus on AI and ML, which it leverages to offer lookalike modeling and user lead scoring











Limitations

- Lemnisk can further build on its growth strategy by expanding presence beyond the APAC market
- Its presence in industries outside BFSI, retail, and telecom is limited. It can further benefit by focusing on other high-growth areas such as electronics, hi-tech, healthcare, travel, and manufacturing
- Lemnisk needs to enhance its technology and SI partner network to expand global presence
- It has further scope of enhancing its analytics capabilities especially its abilities regarding manual predictive models

Optimove

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Optimove’s CDP currently has a strong focus on catering to small enterprises
- It has on-premises deployment capabilities
- Optimove has strong focus on verticals such as retail, telecom, media, and entertainment
- It has a strong presence in the North American and European markets
- Optimove’s acquisition of Graphyte and Kumulos, both personalization platforms, has added strength to its real-time content recommendation and journey orchestration capabilities











Limitations

- Optimove CDP can benefit by expanding its client portfolio in the high-growth APAC market
- It can further benefit by focusing on other high-growth areas such as BFSI and manufacturing
- Optimove needs to enhance its SI partner network to expand global presence
- It has further scope of enhancing its data management capabilities, especially its abilities of data loading
- Optimove has further scope of enhancing its identity management capabilities, especially its abilities of probabilistic matching

Teavaro

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Investment and support	Overall
									

Strengths

- Teavaro has a strong focus on verticals such as retail, CPG, distribution, telecom, media, and entertainment
- It has a strong presence in the European markets
- Teavaro has B2B capabilities such as account level data intelligence and lead to account matching
- It has a strong focus on identity resolution

Limitations

- Teavaro can benefit by expanding its client portfolio in the high-growth markets such as North America and APAC
- It can further benefit by focusing on other high-growth areas such as BFSI, manufacturing, electronics, hi-tech, technology, healthcare, travel, and transport
- Teavaro needs to enhance its technology and SI partner network to expand global presence
- It has further scope of enhancing its product offering by introducing support for data management features, such as data loading, and identity management features, such as probabilistic matching
- Teavaro can further enhance its product offering by introducing support for analytics features, such as manual and automated predictive models, and campaign features such as multi-step campaigns

04

Appendix

- Glossary
 - Research calendar
-

Glossary of key terms used in this report

AI	Artificial Intelligence
APAC	Asia Pacific
B2B	Business-to-Business
BFSI	Banking, Financial Services, and Insurance sector
CMS	Content Management Solution is a software that enables content life cycle management to create, edit, collaborate on, publish, and store digital content
CPG	Consumer Packaged Goods
CRM	Customer Relationship Management is a system used to manage all engagement activities with a company's existing and future customers to promote business growth
DAM	Digital Asset Management is a software that stores, shares, and organizes digital assets (images, videos) in a central location
DMP	Data Management Platform is a unifying platform to collect, organize, and activate first-, second-, and third-party audience data from a plethora of sources
FMCG	Fast Moving Consumer Goods
ML	Machine Learning
PIM	Product Information Management is a system that provides a single place to collect, manage, and enrich your product information and create a product catalog
SI	Service Integrator
UI/UX	User Interface/User Experience

Research calendar

Interactive Experience (IX) Services

Published
 Planned
 Current release

Reports title	Release date
Digital Experience Platform (DXP) Products PEAK Matrix® Assessment 2021	August 2021
Digital Experience Platform (DXP) Products Compendium 2021	September 2021
Digital Marketing's Reckoning with Privacy	October 2021
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2022	February 2022
Digital Commerce Platform Trailblazers: Top 15 Start-ups Redefining Shoppable Experiences	March 2022
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2022 – Provider Compendium	March 2022
Emergence of CDPs: Charting the Path to Data-driven Personalization	July 2022
Adobe Services PEAK Matrix® Assessment 2022	September 2022
Adobe Services Provider Compendium 2023	November 2022
Digital Commerce Platform PEAK Matrix® Assessment 2023	March 2023
Generative AI - Revolutionizing the Marketer's Content Supply Chain	May 2023
Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023	May 2023
Customer Data Platform (CDP) – Provider Compendium 2023	June 2023
Digital Experience Platform PEAK Matrix® Assessment 2023	Q3 2023
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment 2023	Q3 2023

Note: [Click](#) to see a list of all of our published Interactive Experience (IX) Services reports



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