

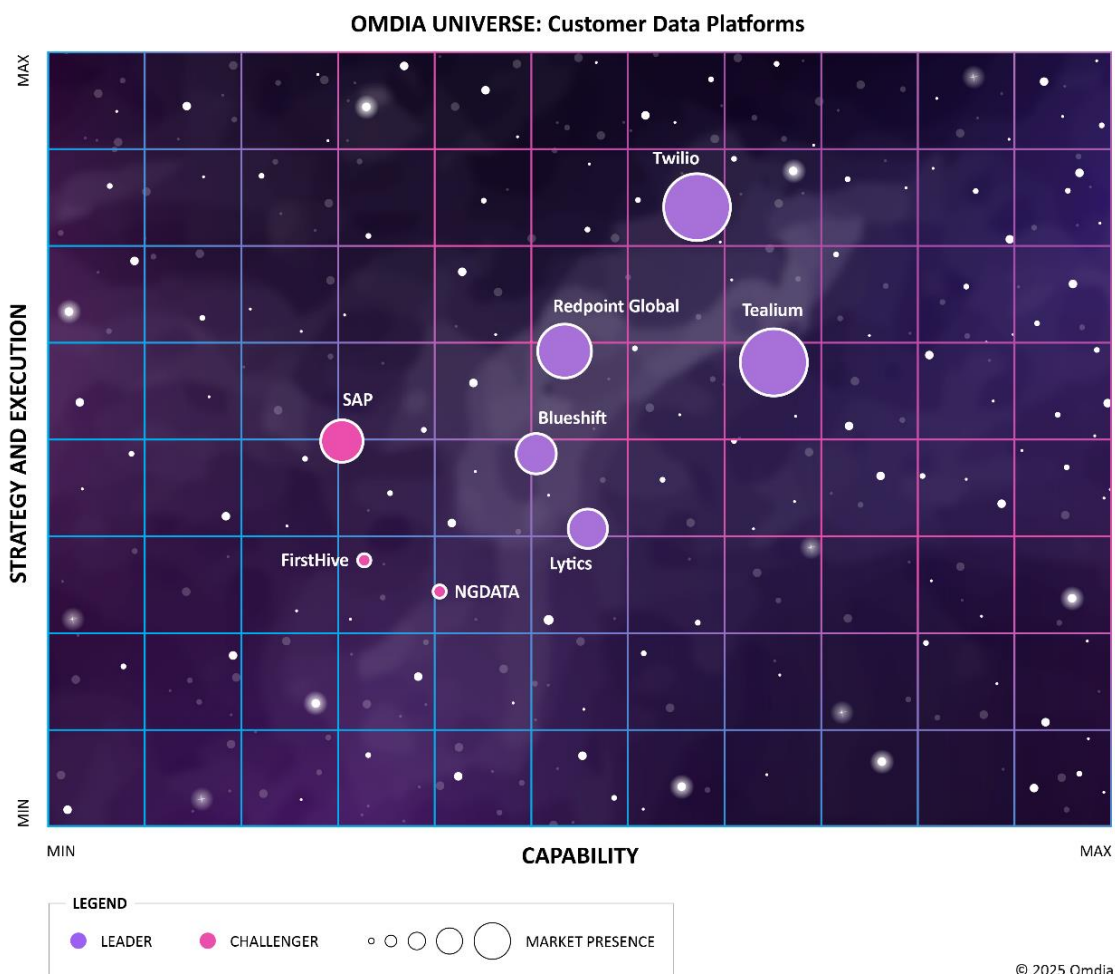
Omdia Universe: Customer Data Platforms, 2025

Summary

Catalyst

Enhancing the customer experience and providing timely, relevant, and highly personalized content through the recipient's preferred channel is imperative for enterprises to survive in increasingly competitive marketplaces. This Omdia Universe for Customer Data Platforms in 2025 compares leading customer data platforms from specialist standalone vendors, allowing decision makers to make informed choices when selecting a platform to address their requirements.

Figure 1: The Omdia Universe Customer Data Platforms



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Source: Omdia

Omdia view

Intense competition in many industry sectors means that providing customers with personalized, engaging experiences to drive sales and keep their customers returning has never been more important. As the online sales model continues to grow in popularity, enterprises need to understand their customers' preferences, behaviors, propensity to buy, and if they also have physical stores or a contact center, how they engage with those. This requires a holistic approach that enables enterprises to build a complete picture of their customers, bringing together online and physical interactions to create a 360-degree view and enabling marketers to develop strategies that will engage their customers and keep them returning. However, this is not always easy. Omdia's annual *IT Enterprise Insights: IT Drivers and Technology Priorities – 2025* survey found that more than 40% of enterprises placed improving the customer or citizen experience in their top three business challenges. Enterprises need to engage with their customers, targeting them with the right content at the appropriate time via their preferred channel.

However, engaging customers to achieve a sale is one thing—retaining them is another. The Customer Service Institute of America (CSIA) conducted a survey and found that acquiring a new customer is five times more expensive than retaining an existing one. Some commentators put the figure as high as 25 times. The survey showed that 44% of companies admitted to having a greater focus on acquisition, with only 18% focused on retention, yet increasing customer retention rates by 5% results in increased profits of 25–95%. Managing the customer journey and providing relevant content at the right time is, therefore, important.

Customer data platforms (CDP) have become a vital tool for marketers by providing a detailed view of customers' interactions with a brand from the initial point of contact (typically as an anonymous visitor to the website) through the initial sale to cross-selling and upselling opportunities. They can ingest customer data from multiple sources to build real-time customer profiles, segment customers who can then be targeted with relevant content, manage and orchestrate customer journeys, and provide valuable analytics and insights that are used to drive customer engagement.

The ability to provide personalized experiences is nothing new. Web content management (WCM) systems have collected customer data and analyzed it to personalize experiences for over 20 years. However, the data gathered was confined to web interactions, which may now form only a small part of a customer's overall interactions with a company. Unfortunately, many enterprises still have legacy WCM systems; they have not implemented CDP and cannot, therefore, provide a complete view of their customers. The Omdia *IT Enterprise Insights: IT Drivers and Technology Priorities – 2025* survey showed that only 24% of enterprises are well-advanced with digital transformation initiatives in transforming the customer experience, with 7% yet to start. Therefore, implementing a modern, intuitive, headless digital experience management (DXM) system and a CDP is imperative if enterprises are to survive in a multichannel sales environment.

There are two types of CDP vendors. The first is DXM vendors that include CDP in their portfolios, which are often an evolution of personalization solutions with the addition of marketing automation capabilities. The second type of vendor is specialist CDP vendors, many of which only provide CDP. This Omdia Universe focuses on specialist vendors.

Analyzing the customer data platforms universe

Market definition

A customer data platform (CDP) is a solution that collects and unifies first-party customer data from multiple online and offline sources including business applications, web, email, social media, SMS, contact centers, chatbots, and point of sale (POS), in real time. This data is used to create a single, centralized view of all of the interactions and touchpoints between each customer and a product or service to create a customer profile. That profile can be made accessible to other systems to analyze, track, and manage customer interactions. Core features that should be available with a CDP include the following.

Technology features

- **Repository and data cleaning:** This includes the main components of the CDP solution and any add-ons. It also incorporates the methods for collecting customer profile data, data cleansing techniques, and how customer profiles are built.
- **Segmentation and targeting:** Included in this category are the capabilities available for segmenting customers, including how segments are built, out-of-the-box segments, segment recommendations, any predictive segment capabilities, A/B and multivariate capabilities, and generative AI (GenAI) features.
- **Analytics and insights:** These are dashboards and reports used to analyze customer data. Out-of-the-box dashboards providing insights across areas such as profiles, audiences, destinations, and license usage, and a range of reports should be provided. Features should also include capabilities for building custom dashboards and reports.
- **Customer journeys:** This category covers capabilities for building customer journeys across multiple touchpoints. These tools should support a graphical environment for creating journeys and include triggers, events, and activities. Customer journey maps are also included in this category.
- **Cross-channel orchestration:** This category incorporates the delivery channels supported, which should include email, SMS, web, social networks, in-app, physical stores, push notifications, contact centers, and virtual assistants, as well as how multichannel campaigns are delivered.
- **Security, compliance, and governance:** Security and compliance features such as protecting personally identifiable information (PII), storing and adhering to customer consent and preferences, addressing subject requests, and the right to be forgotten to comply with regulations such as GDPR and CCPA are covered in this category.

Non-functional capabilities

- **Cloud capabilities:** This category includes the various options for cloud deployment, including the cloud options available; which public clouds are supported; the ease, cost, and speed of migrating content to the cloud; and cloud security.

- **Non-functional:** This section covers non-functional requirements that help determine the effectiveness of the software such as deployment, usability, support and maintenance, licensing, and training.

Market dynamics

The aftermath of the COVID-19 pandemic has changed the marketplace dynamics, particularly concerning online sales. Many companies that adapted their sales models to 100% online never returned to physical stores or had a much smaller physical presence. This has resulted in much more competition for online sales. An added problem for organizations is gathering information about their customers, which has become more difficult as first-party data has largely replaced third-party cookies. As customers now need to provide consent for organizations to store or use their data (other than required data), finding enough customer data to create an accurate profile from a single source has become an issue. Therefore, the ability to ingest data from multiple systems provides more opportunities to collect the data required to create detailed customer profiles. This has created an environment in which the adoption of solutions such as CDP to store and manage customer profile information has become vital for the survival of many companies.

It is hardly surprising, given the importance of CDP software, that there is a very large marketplace of CDP vendors that numbers well over 150, which is an unsustainable number in the long term. There will inevitably be vendors that do not survive, with some being acquired by competitors. One such example of this is Segment, which was acquired by customer engagement vendor Twilio in 2020, extending its capabilities. Of the two types of vendors in the marketplace (specialist and DXM), the specialist vendors are most at risk of acquisition or even failure because companies that have deployed a DXM solution with a CDP are likely to use the entire portfolio. Specialist vendors, therefore, have the challenge of persuading potential customers that their platforms have better capabilities than those of the DXM vendors. On the upside, specialist vendors can often implement new features quicker than vendors with very large portfolios where R&D budgets have to compete with other applications.

However, not all DXM vendors include CDP in their portfolios. Those that do not often have partnerships with specialist vendors and provide out-of-the-box connectors to CDP solutions. Some of these DXM vendors will likely acquire or merge with CDP vendors to provide them with additional capabilities to compete more effectively with those DXM vendors that already have CDP embedded. Another kind of product that CDP vendors would do well to partner with is customer communications management (CCM) systems. CCM solutions are designed to create multichannel customer communications, which makes them ideal partners for CDP as they are moving into the marketing space. Again, there may be acquisitions over the next few years as CCM evolves from producing traditional large-batch communications to a marketing tool to produce personalized messages and multichannel marketing campaign content.

Figure 2: Vendor rankings in the customer data platforms Universe

Vendor	Products evaluated
Leaders	
Blueshift	Blueshift CDP
Lytics	Experience Customer Data Platform (xCDP)
Redpoint Global	Redpoint Customer Data Platform, Redpoint Orchestration, Redpoint Real-Time Interactions, Redpoint Data Management
Tealium	Tealium Customer Data Hub (plus add-ons)
Twilio	Segment (plus add-ons)
Challengers	
FirstHive	Customer Data Platform
NGDATA	Intelligent Engagement Platform
SAP	Customer Data Platform, SAP Customer Identity and Access Management

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Source: Omdia

Market leaders

The leaders in this report are Blueshift, Lytics, Redpoint Global, Tealium, and Twilio. To be a leader, a vendor must have a large number of capabilities across all technology areas and score highly across the majority of areas. Most will have strong artificial intelligence (AI) and machine learning (ML) capabilities and will either already have implemented GenAI capabilities or be considering how to exploit the technology. They will generally have particularly strong areas where they have differentiated themselves from their competitors. Leaders tend to be larger and have a higher market profile than challengers and prospects, although there are exceptions; Blueshift is one such example in this report. However, because they have more capabilities, their products may be more complex to implement, requiring more extensive professional services and longer and more complicated implementation projects.

Market challengers

The market challengers are FirstHive, NGDATA, and SAP. Challengers score highly across most technology areas, but they may be missing a few features that leaders have or may have less extensive functionality across certain areas. With the platforms of challengers typically not being as extensive as those of the leaders, they are less complex to implement, requiring fewer professional services, and enterprises with the appropriate skills in-house may be able to complete the implementation without any external support.

Challengers have the potential to become leaders by adding a few more capabilities and finding areas in which they can innovate.

Market prospects

There are no prospects in this report because prospects are niche players that may operate in a particular area of the market. The capabilities of a prospect may still be extensive, but because they are targeting a specialized area of the market, not all of these features will be included in a report of this nature, which compares the capabilities of products that target a much wider market. Deployment options do not necessarily define a prospect, and they can be extensive, providing a great deal of choice. Prospects can become challengers if they widen their appeal to a broader market by adding some of the missing capabilities, but this is not always the aim of a specialist, niche vendor, which may have a monopoly in its small section of the market.

Opportunities

Opportunities for vendors include providing integrations and partnerships with DXM vendors that do not include CDP in their portfolios. Because CDP is such an integral part of a DXM, partnering with vendors that can bundle the CDP with their DXM will benefit both vendors. Another application that can benefit from CDP is CCM, and integrations and partnerships with these vendors will provide additional opportunities.

Another opportunity is innovation through the development of GenAI capabilities. Many vendors have already added some GenAI capabilities to their solutions, but there are more areas where it can be added to make it easier for marketers to create segments, build customer journeys, create marketing campaigns, and gain valuable insights from their data, in addition to generating marketing content.

Threats

A major threat to CDP vendors is the number of vendors in the marketplace. Currently, the market is saturated with vendors, and not all will survive in their current form in the long term. There will inevitably be consolidation in the marketplace, and some vendors may strengthen their positions by merging with or acquiring competitors to increase their market share.

Standalone CDP vendors face the additional challenge of competing with DXM vendors that have their own CDPs that are also capable of running as standalone applications. Many DXM customers will be satisfied with using the CDP of the DXM vendor, so there are limited opportunities to build market share in this area of the market, which will make it difficult for specialist, standalone vendors.

Market outlook

The CDP market will grow in value as more enterprises adopt the technology to help them deliver engaging, relevant content to customers. Some of this revenue will be for all-in-one DXM platforms that include CDP. According to our *IT Enterprise Insights: IT Drivers and Technology Priorities – 2025* survey, more than one-quarter of enterprises plan to make strategic investments in DXM, with a further 34% planning a minor investment. About the same number are planning strategic investments in CCM software, with 35% planning a minor investment. When it comes to CDP, 28% stated that they are planning strategic investment, with a further 35% planning a minor investment, and for customer journey orchestration, the figures were 23% for strategic investment and 34% for a minor investment, which offers hope for standalone vendors. This demonstrates that there will be a lot of investment in these products over the next 12 to 18 months.

Although mature, the content management space, of which CDP and DXM are important parts, is still growing at a forecast annual growth rate of 12.37% between 2021 and 2026, according to Omdia's *Software Market Forecasts: Analytics and Data Management, 2021–26*. We expect the value of the market to increase from \$39,084 million in 2025 to \$44,112 million in 2026. These forecast figures suggest many enterprises have yet to upgrade legacy systems; it also demonstrates that there is budget available to make the investments that enterprises have planned in DXM, CDP, CCM, and customer journey orchestration.

Vendor analysis

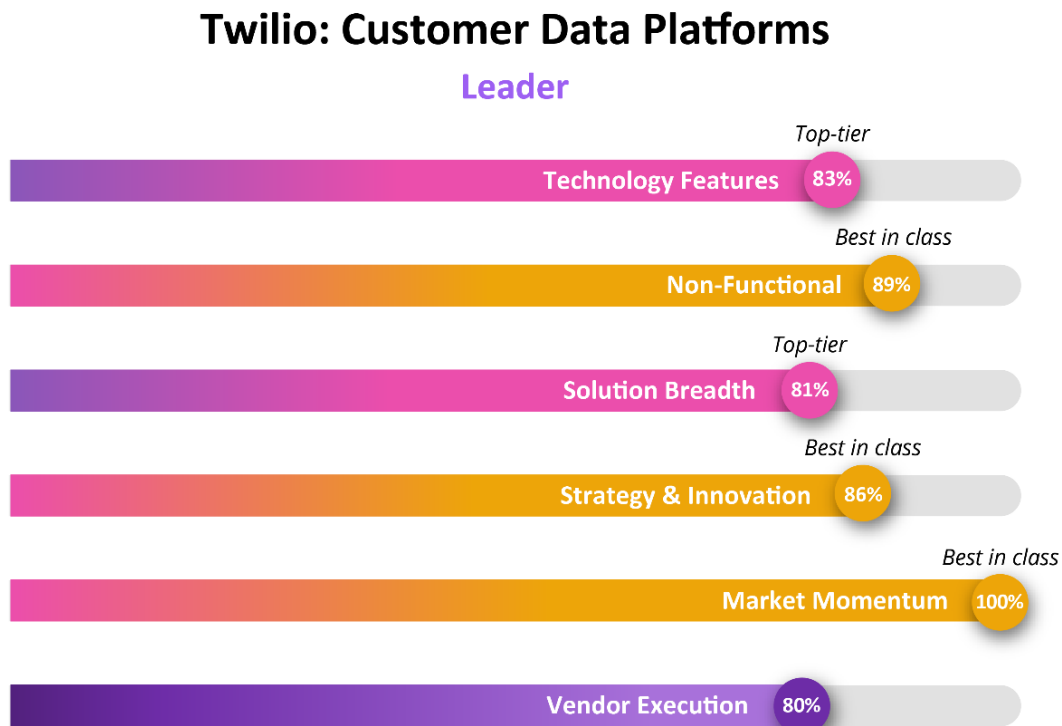
Twilio (Omdia recommendation: Leader)

Twilio should appear on your shortlist if you are looking for a CDP that caters to the needs of both marketers and data teams or a prepackaged B2B solution.

Overview

Twilio provides a customer engagement platform as well as a CDP, which it added to its portfolio when it acquired Segment in 2020, enabling it to offer personalized, timely engagement across customer service, marketing, analytics, product, and sales. Twilio Segment enables users to collect, unify, activate, and govern first-party customer data. The product was built with a vendor-agnostic approach, allowing enterprises to leverage their preferred tools. Twilio Segment provides more than 700 connectors out of the box, and it includes full interoperability with data warehouses, such as Databricks, Snowflake, Big Query, and Redshift, through several features. These include storage destinations to store raw data from the CDP; Reverse ETL to extract data from the warehouse; Profiles Sync to sync unified profiles to the warehouse; and Linked Audiences to build powerful audiences directly from the warehouse. Twilio Segment is applicable across any industry, with key markets including retail, B2B, banking, insurance, financial services, and healthcare. Other industries include high tech, CPG, travel and hospitality, and education. A few broad offerings serve specific markets. For example, Segment B2B Edition makes it easy for marketers and data teams operating within B2B brands to work together on a single data model built for rich targeting of buying teams. Additionally, Segment for Healthcare is a fully packaged, HIPAA-eligible, integrated solution built for healthcare providers that automatically syncs certain patient data from EHR into Segment without manual generation and exports data for key patient communication use cases.

Figure 3: Omdia Universe ratings—Twilio



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Source: Omdia

Strengths

Strong areas for Twilio include segmentation and targeting, repository and data cleansing, and security, compliance, and governance.

Twilio Segment provides many segmentations out of the box, including demographic, geographic, and technographic segmentation, customer lifecycle stage, and engagement level. It also enables customers to create additional audience segmentations directly within Twilio Segment. Once customer data has been cleaned and put into individual user profiles, users can create Audience segments based on any trait, event, or property from the profile. To define an Audience, marketers can click on a series of dropdown menus to select any event, property, or trait from the profile or even an existing Audience. Users can set a time window and numerical property to refine the criteria for this Audience and then preview the results. Audiences are updated automatically and in real time.

Twilio Segment also has predictive and generative AI features to simplify the process of creating additional segmentations. Generative Audiences allow users to use natural language prompts to build and define Audiences, saving marketers time as they set up audiences, design, and delivery mechanisms for campaigns, ultimately speeding up the campaign creation process.

Predictive Audiences lets marketers use AI to segment their customers automatically based on criteria from customer profiles. The user can define criteria for predicting customer behavior based on traits and events in the profile. Once this criteria is set, Twilio Segment provides transparency into the predictive AI model to show how it reached its decisions.

In terms of repository and data cleansing, Twilio Segment collects and stores customer preferences through a sophisticated data collection and management process designed to aggregate first-party customer data from various touchpoints. This process begins with the integration of Segment's technology across a company's data sources and destinations. Twilio Segment can ingest real-time data from multiple customer touchpoints, such as websites, mobile apps, or other customer-facing systems. This is achieved via APIs or SDKs that capture customer events and behaviors, such as page views, product purchases, or form submissions as they occur. This data is immediately processed and routed to Twilio Segment's platform. Twilio Segment also has native integration with OneTrust, enabling it to track, store, and enforce customers' consent preferences for web tracking.

Twilio Segment captures customer activities, preferences, and behaviors in real time. The data collected includes explicit customer preferences, such as opt-ins or opt-outs, and implicit preferences, inferred from customer behavior and interactions. This might include which products they view, the content they engage with, or the features they use most frequently. Twilio Segment then standardizes this data, ensuring it is consistent and formatted correctly for ML, analysis, and storage. Standardized data is stored in Twilio Segment's secure, centralized database, where data from various sources is unified into comprehensive customer profiles. These profiles provide a 360-degree view of each customer, including their preferences, which are then made accessible to the business.

A combination of automated quality assurance checks, data transformations, and validation mechanisms ensures that ingested data is clean and of high quality. Tracking plans can be built to allow users to validate live events delivered to Twilio Segment against expected events in the spec to enforce data governance standards by identifying and flagging any non-conforming data. It can check for missing required properties, invalid data types, or values that do not pass conditional filtering.

Twilio Segment ensures GDPR and regulatory compliance by updating practices to protect EU residents' data, supporting customer compliance through consent management, PII protection, and local data processing. It adheres to global privacy regulations, facilitating rights such as data deletion requests and data sovereignty, while continuously adapting to evolving digital privacy standards.

Twilio Segment protects PII through a comprehensive privacy and security framework that detects, classifies, and manages sensitive data by automatically detecting PII within customer data, using matches for common PII fields such as social security numbers, passwords, and credit card numbers. This data is then classified into risk-based categories (red, yellow, and green) to indicate the level of restriction required. Enterprises can set rules to block the collection of restricted personal data.

Twilio Segment's open source Consent Manager is designed to collect and manage consent from website visitors. It integrates seamlessly with a website, optimizing Analytics.js to honor consent preferences and automatically covering all Twilio Segment integrations, whether they operate in Device Mode (for applications such as Facebook Pixel) or Cloud Mode (for applications including Zendesk). This ensures that any data collection tool added via Twilio Segment is automatically included in the consent modal, maintaining transparency with users. When new tools are added to a website, the Consent Manager prompts visitors for consent again during their next visit, allowing businesses to update their marketing and analytics stack. Twilio Segment collects consent for registered and anonymous users and is fully customizable to match the user experience of the hosting website. Twilio Segment also has a Privacy Consent Enforcement tool for easy integration with third-party consent management tools such as OneTrust. This feature enables businesses to pass customer consent preferences to Segment and enforce them across all destinations without the need for additional coding, simplifying the process of adhering to user consent preferences across various marketing and analytics platforms.

Limitations

While Twilio Segment provides some analytics, the majority are provided via integrations with several BI and analytics solutions to provide deeper analysis. Twilio Segment can also seamlessly integrate with the analytics solutions customers already have in place. Providing a full analytics solution of its own would allow enterprises that do not have a preferred or existing solution access to a full analytics capability without having to license an additional product from a third party.

Twilio Segment offers some GenAI capabilities, but these are currently somewhat limited. Plans to extend GenAI features are on the roadmap, including Generative Audience Discovery, which will suggest “audiences of interest,” Predictive Journeys to determine, orchestrate, and deliver optimal marketing for every customer, and updates to the Personalization API to power LLM-based, virtual agent–driven use cases.

Appendix

Methodology

Omdia Universe

Omdia’s rigorous methodology for the Universe product involves the following steps:

- Omdia analysts perform an in-depth review of the market using Omdia’s market forecasting data and Omdia’s enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

- The solution must be capable of operating as a standalone CDP solution.
- The solution provides integration capabilities to a wide range of applications.
- The vendor has adopted a cloud-first architecture that allows the solution to move between on-premises and the cloud easily.
- The solution has significant recognition among enterprises, covers a range of verticals, and has a presence in multiple geographies.

Further reading

[*Omdia Universe: Digital Experience Management, 2023–24*](#) (November 2023)

[*Fundamentals of Digital Experience Management 2023–24*](#) (January 2024)

[*Omdia Universe: Digital Asset Management, 2023*](#) (June 2023)

[*Fundamentals of Digital Asset Management 2023*](#) (July 2023)

[*Trends to Watch 2025: Content Management*](#) (November 2024)

[*IT Enterprise Insights: IT Drivers and Technology Priorities – 2025*](#) (October 2024)

[*IT Enterprise Insights: IT Spending & Sourcing – 2025*](#) (October 2024)

[*IT Enterprise Insights: AI – 2025*](#) (October 2024)

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