

For B2C Marketers, Customer Data Platforms Overpromise And Underdeliver

Simplicity Isn't Enough To Solve Complex Marketing Challenges

by Joe Stanhope and Stephanie Liu

October 26, 2018

Why Read This Report

Enterprise B2C marketers face the convoluted task of wrangling myriad customer data to deliver customer-centric, contextually relevant engagement. Amid this challenge, customer data platforms (CDPs) offer an alluring sales pitch of centralizing disparate data and simplifying complex orchestration processes. But for many enterprise B2C marketers, CDPs are a Band-Aid solution on a much larger challenge. This report provides a close look at CDPs' capabilities and shortcomings and guides B2C marketers through the CDP marketplace.

Key Takeaways

CDPs Can't Solve B2C Marketers' Most Pressing Problems

CDPs lack crucial capabilities to solve for identity resolution, data hygiene, and cross-channel orchestration. Thus, they can't meet enterprise B2C marketers' expectations for personalized and targeted customer engagement.

Marketers, Evaluate Your Existing Tech Before Jumping Into A CDP Evaluation

Marketing clouds, identity resolution vendors, data-oriented agencies, and even Google are renewing their emphasis on activating customer data for better cross-channel engagement. Marketers should closely evaluate their existing tools and services to ensure a CDP won't be duplicative or unnecessarily complex.

If You Are Considering A CDP, Let Use Cases And Marketing Challenges Lead The Way

The CDP market is too disparate for firms to evaluate it as a whole. Instead, marketers' use cases should drive decisions on which type of CDP may support their needs: data pipes, orchestration, automation, or measurement.

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Related Research Documents

[Now Tech: Customer Analytics Technologies, Q1 2018](#)

[Now Tech: Identity Resolution, Q3 2018](#)

[The State Of Enterprise Marketing Technology, 2018](#)



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The Struggle Is Real: Marketers Need Data Help

For enterprise B2C marketers, wrangling customer data has always been a Herculean task, and it's growing increasingly difficult as customer touchpoints proliferate.¹ Adding complexity, consumers are more privacy conscious, so brands must be efficient with their existing customer data.² And despite the vaunted status of first-party data, 25% of global B2C marketers say managing data quality is a top challenge.³ Enter the customer data platform (CDP). Forrester defines a CDP as:

A CDP centralizes customer data from multiple sources and makes it available to systems of insight and engagement.

CDPs promise to unify customer data and make it accessible to marketers without ripping and replacing existing marketing technology (martech). CDPs deserve credit for highlighting a major marketer pain point: Data has become bigger, faster, and more complex, and marketers have to activate it on more channels. The opportunity is clear: Brands need a modern data fabric to support high stakes customer engagement.⁴

CDPs Aren't Equipped To Solve B2C Marketers' Woes

Unfortunately for CDPs, they've identified a legitimate problem but don't have the right technology or services to solve it. Tellingly, much of the CDP hype seems to come from vendors. Since 2017, Forrester has received 114 client inquiries about CDPs; most were from vendors — a mere 21 were from end users.⁵ CDPs struggle to deliver on their promises today because:

- › **The CDP market is unfocused.** Ray Leihe, a marketing technologist, observed, "Each vendor is so different that there are no clear common boundaries. Suddenly, a lot more vendors claim they are a CDP." We agree — the CDP market is a disparate one based on a generic concept, but we believe a vast majority of vendors fall into one of four buckets: data pipes, orchestration, automation, and measurement (see Figure 1). The lack of structure and go-to-market rigor in the CDP market today makes it difficult for marketers to understand potential benefits, identify prospective vendors, and make the business case to invest.
- › **CDPs lack critical data capabilities.** Identity resolution lies at the heart of customer-centric marketing and makes or breaks a CDP's legitimacy and effectiveness. We received product overviews and demos from 18 self-identified CDP vendors; of those, only five offered advanced features for identity resolution, such as secondary probabilistic matching and customizable matching rules.⁶ Even fewer base identity on referential data or offer data hygiene and third-party data enrichment. One interviewee says CDPs can be a primary ingestion point, but "you can't just buy a piece of software and solve for data quality. Data is always dirty."
- › **CDPs' immature capabilities miss marketers' expectations.** CDPs lack standard and advanced features that enterprise B2C marketers require and use today in existing tools. In the retail sector, a customer bemoaned his CDP's lack of key analyses such as customer lifetime value; he ultimately had to build a separate measurement solution. Another CDP customer still spreads segmentation

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across separate CDP and email solutions to fulfill her targeting requirements. Another said his CDP's product recommendations were so irrelevant that he removed the feature from his sites and emails entirely and later reinstated them via an optimization vendor.

- › **CDPs add bulk to marketers' overloaded tech stacks.** Many vendors we spoke with pitched a story of simplicity: CDPs work in conjunction with, rather than replace, existing technologies. But this supposed benefit contradicts what we hear from marketers. In a survey of marketers who use enterprise martech, 46% agreed they want to reduce the number of vendors that supply their martech.⁷ Overloaded marketers rarely see abstracting their data off into yet another repository as a preferred solution. And this additive nature leads to unintended consequences. One interviewee faced internal politics and difficulty determining which department should pay for a CDP. Because a CDP is a net-new technology, her organization lacked precedent on whether the analytics, marketing, or technology organization should fund and/or manage the tool.
- › **CDPs expect too much of end users.** Most CDP firms we spoke with presented their technologies as self-service, but that flies in the face of marketers' challenges today. Thirty-two percent of global B2C marketers say technology skills are one of their biggest challenges with marketing programs, so the lack of professional services will hinder adoption and effectiveness.⁸ Consider the fate of another heavily self-service platform: email. It has suffered from marketers' lack of investment in talent and resources, so rather than it being a data-rich channel, email has suffered from 20 years of run-of-the-mill promotional campaigns.⁹

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FIGURE 1 Four Common CDP Categories

	Data pipes	Data-pipes-oriented CDPs provide a waypoint for marketing data, similar to a data warehouse or data mart, by ingesting and centralizing data. They make compiled customer data available to other technologies for analysis and execution.
	Orchestration	Orchestration-oriented CDPs build customer profiles and segments that marketers can use to target messages. They provide a segmentation interface to provide audiences to engagement platforms, as well as direct targeting via web and messaging personalization and product recommendations.
	Automation	Automation-oriented CDPs focus on the development and execution of customer marketing campaigns. They provide a campaign design interface, natively execute campaigns such as email and mobile messaging, and embed a decision engine to automate campaign orchestration.
	Measurement	Measurement-oriented CDPs collect data with the ultimate goal of supporting campaign measurement and customer analysis. These tools export data to specialty analysis solutions and natively offer reporting, modeling, and analysis features, as well as ingest third-party model code for scoring.

Marketers Need To Consider Every Option

The marketer-data challenge isn't going away anytime soon. It will constantly evolve as marketers locate new data sources, extend personalization deeper into customer experiences, and adopt new tactics to engage customers. In their current form, CDPs are not the singular answer. But fear not; there are other options. Marketing clouds, identity resolution vendors, and others also recognize the opportunity to further leverage and activate marketing data. Before diving into a CDP evaluation, consider your existing tech stack capabilities. While they may not label their data capabilities as a CDP, martech vendors and agencies have the tools to coordinate customer data. For example:

- › **Marketing clouds put CDP capabilities into marketing suite context.** Marketing clouds have a leg up because they are already a part of martech stacks, have access to first-party customer data, and can leverage CDP-like capabilities as an enrichment opportunity.¹⁰ One Salesforce customer said his CDP doesn't integrate with marketing channels as well as he'd hoped, so he relies on Salesforce Marketing Cloud and Ad Studio in addition to Salesforce's data management platform (DMP) to fill in his CDP's gaps. When he needed a preference management solution, he similarly turned to Salesforce. "Other providers are stitching systems together to tell a compelling story in a way that our CDP hasn't been able to," he says.

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- › **Google is courting enterprise marketers with expanded offerings.** Google wants to grow its business with enterprises, and its massive advertising presence offers unique crossover appeal. Google is positioning broader solutions by upgrading and integrating key products such as Google Ads Hub, Google Cloud Platform, and Google Marketing Platform to offer a formidable range of capabilities. It is suggesting marketers centralize data into its Cloud Platform as the basis for the customer database and marketing analytics.¹¹ Similar to marketing clouds, it can build this relationship with existing Google Analytics and DoubleClick customers.
- › **Identity resolution vendors can build the single source of truth for customer data.** Accurate, scalable, and durable customer identification is fundamental to modern marketing, and no supplier category is better positioned at this nexus of data and activation than identity resolution.¹² On paper, these vendors resemble the basic data ingestion and stitching capabilities of CDPs, but with a crucial distinction: They specialize in offering the highest form of customer recognition and data integration available in the market. As brands invest in high quality identity resolution, they're likely to leverage their customer identity graph assets as the reference point for profile stitching and application integration to support an expanded palette of analysis and marketing use cases.





Evaluating CDPs: Focus Less On Talking, More On Substance

CDPs are making noise in the marketing space, so we sympathize with marketers who are struggling to make sense of this new category and how it fits into the martech landscape. Some buyers recognize that CDPs aspire to address their data management and activation challenges but aren't sure how to cut through the noise. In these instances, Forrester recommends putting use cases and marketing challenges front and center. There may be some niche use cases where a CDP can add value (see Figure 2). Marketers and CDPs need to be specific in outlining business needs and detailing solutions, respectively.

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FIGURE 2 CDPs May Provide Value In Addressing Some Niche Use Cases

	CDP category	Use cases where a CDP may provide value
	Data pipes	<ul style="list-style-type: none"> Collecting and staging data for customer insights Collecting data for marketing and CX cloud platforms Interim data storage while database or data lake projects are in-flight Filling in niche data collection or distribution gaps within existing stack
	Orchestration	<ul style="list-style-type: none"> Personalization for messaging and web channels Product recommendations Consistent audience creation across systems of engagement
	Automation	<ul style="list-style-type: none"> Entry-level, email-oriented marketing automation Consolidated solution for small or resource-constrained teams unlikely to invest in enterprise-class martech Accelerate use of modeling and machine learning techniques within marketing automation processes
	Measurement	<ul style="list-style-type: none"> Consolidated modeling workbench for small or resource-constrained teams unlikely to invest in standalone modeling tools Data set development for systems of insights Scoring engine for models built in third-party platforms

For B2C Marketers: A CDP Buying Primer

Marketers, don't fall for the hype: CDPs are not a data savior. We caution marketers not to evaluate CDPs as a singular category; instead, consider what types of data, insights, and engagement will support the brand objectives. If you are considering a CDP, manage expectations and keep your evaluation on track with these considerations:

- › **Evaluate CDPs by using your use cases as a North Star.** Marketers should use their use cases to guide the evaluation process. A technologist at an agency explains: "Clients ask, 'What do you think about this [CDP]?' It's not that simple. You have to understand your requirements and use cases and match them up to how the CDP approaches solving that problem." By emphasizing use cases rather than focusing on acquiring another acronym-named technology, buyers can target their searches on not just the appropriate CDP category, but also non-CDP contenders.¹³
- › **Don't expect CDPs to replace a data management strategy.** CDPs are not a stand-in for a thoughtfully planned identity resolution strategy or customer database. Marketers need to set the data strategy and then determine if a CDP vendor can help them execute. And marketers can expect to do much of the legwork. One CDP customer told us, "I think of CDPs as a packaged

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system, but I'm not sure that's what we got. We had to do the hard stitching and manual work to get the CDP to work. It feels more like a data warehouse." Another interviewee advised, "More often than not, the right solution when using a CDP is to wrap data processing and data management solutions around it."

- › **Recognize that CDPs focus solely on known customers.** CDPs are often confused with DMPs, but their roles are completely distinct. CDPs focus specifically on collecting and segmenting known customer data, most commonly to support outbound messaging and personalization. DMPs use anonymous user data to target and syndicate audiences in digital media.¹⁴ CDPs operate independently from the advertising technology (adtech) ecosystem, so if you're part of the 67% of global marketers who are planning to integrate your martech and adtech tools, pay specific attention to how a CDP may support — or complicate — the digital marketing supply chain, particularly data management, onboarding, and targeting.¹⁵
- › **Understand where a CDP fits in the martech stack.** At the enterprise level, CDPs are, by definition, not a standalone solution; instead, they are additive to a larger, established martech ecosystem. Therefore, a CDP must complement existing martech capabilities. Marketers must verify that a CDP's benefits offset the financial, resource, and process implications of deploying and managing a new data repository and that its capabilities consolidate rather than duplicate existing investments. It should also functionally outperform the martech ecosystem's existing benchmarks for orchestration, insights, and engagement capabilities.¹⁶

For CDPs: Enterprise Marketing Challenges Require Enterprise-Grade Solutions

When CDPs define themselves using the lowest common denominator, they make understanding the category, much less identifying benefits and differentiators, nearly impossible. Worryingly, many CDPs seem to lack a fundamental understanding of enterprise-class B2C marketing, instead relying on pure technology positioning. Nearly every CDP demonstrated an individual customer profile with attributes and purchase histories, but enterprise marketers don't have time to drill down to an individual level when crafting marketing campaigns and may even risk exposing sensitive customer information in a marketing application interface. If CDPs hope to stay afloat in the next two to five years, they must:

- › **Articulate a clear value proposition.** One CPG marketer summarizes the challenge in three words: "Incremental value unclear." A vendor acknowledged, "[It's] difficult to articulate business benefit and ROI when it appears to be another data project."¹⁷ CDPs need to better understand marketing, master the craft, and clarify how they drive business results. For example, identity resolution and campaign orchestration are a bare necessity for marketers today, but too many CDPs treat them as afterthoughts rather than core capabilities. Until they recognize the sophistication of modern marketing today and the complexity of enterprise marketing technology stacks, CDPs will be relegated to niche use cases and midmarket buyers.

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- › **Relate to buyers.** Most CDP firms we interviewed oscillate between pitches that exclusively target either marketers or IT, which alienates buyers and oversimplifies the value proposition. Few CDPs seemed to understand marketers' day-to-day functions and are clearly more comfortable discussing technical features such as APIs and database infrastructure. Marketers are CDPs' primary sponsors, but managing customer data requires collaboration with technology and customer insights stakeholders. A CDP customer we spoke with wondered: "Where does my CDP fit within the overall architecture of our systems? IT needs to lead maintaining the data flowing in and out. I don't have those resources on my team." Vendors must develop a strong value proposition for marketers that recognizes the complexities enterprises face in managing marketing data and drives value for the full marketing technology team.
- › **Build partner relationships.** We heard a common theme in our user and partner interviews: CDPs offer some value, but not always what they advertise or to the extent promised. Marketers can extract additional value by using CDPs in conjunction with partners such as customer database and engagement agencies.¹⁸ Beyond acting as a sales channel for CDPs, partners provide valuable skills and continuity to deploy, integrate, and manage CDPs within the existing data and tech stack and support day-to-day operations.
- › **Innovate or risk being replaced.** New technology categories, by definition, must innovate. But with few exceptions, CDPs are striving for parity rather than pushing the envelope. CDPs are attempting to recreate existing or already commoditized capabilities. Customers told us they use non-CDP tools for functions CDPs say are in their wheelhouse: a/b testing, recommendation engines, marketing measurement, and segmentation. They also complain about CDPs falling short of real-time customer engagement, which has been a common CDP promise. One customer warned, "If [our CDP] can't innovate, we'll find another way to answer the questions that we need answered to move the business forward."

What It Means

Many CDPs Will Enter; Few Will Win

Enterprise B2C marketers' challenges with their customer data highlight the shortcomings — rather than value proposition — of most CDPs. Marketers don't need another system to store customer data; what they need is the ability to make data smarter, actionable, and connected across online and offline channels. Ultimately, CDPs' greatest competitive threat is the marketing clouds, such as Adobe, Oracle, and Salesforce, that are already ingrained in most enterprise martech stacks and are investing in capabilities far more sophisticated than CDPs'.¹⁹ As the CDP landscape faces intense scrutiny in the face of alternative, enterprise-grade solutions, we predict:

- › **CDPs' relevance will fade as enterprises prioritize a CX data management strategy.** CDP adoption will falter as marketers turn their attention to building a data management strategy that supports broad customer experience (CX) practice areas, including marketing, eCommerce,

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sales, and service. Instead of parking customer data in isolated pools, enterprises will seek data management strategies that link traditionally disparate departments and systems to support the customer experience beyond marketing's purview. CDPs' limited use cases will limit their applicability in a cross-departmental CX strategy.

- › **Agencies and brands — not marketing clouds — will acquire CDPs for data capabilities.** Marketing clouds have traditionally acted as strategic acquirers of new martech categories, but all signs indicate that the future of CDPs lies elsewhere. As marketing clouds forge their own paths for customer data management, agencies and brands will acquire CDPs to bolster their product and services offerings. Semiconductor company Arm buying Treasure Data to manage internet of things data was just the tip of the iceberg.²⁰ Financial services companies seeking to centralize their first-party data in near real time will find CDP systems attractive; for agencies, an acquired CDP provides a data foundation for more advanced data-driven capabilities that clients demand — supporting data science projects, artificial intelligence initiatives, and measurement efforts, for example.
- › **Surviving CDPs will team up to serve midmarket firms.** Proving the value of CDPs will always be a challenge, forcing CDPs to rethink where they fit in the martech value chain. To rectify this, CDPs will focus on serving midmarket clients where their core value proposition is clearest and go to market — both in partnership with and following mergers — with midmarket execution vendors that offer campaign management, messaging, and personalization solutions. This is a mutually beneficial relationship; the execution vendors gain a data foundation and further entrench themselves in the martech stack as customer data activators; the CDPs gain a direct tie-in to customer engagement and a means of proving ROI. Together, they can deliver compelling solution packages within an attractive cost model for small and midmarket firms that typically lack the resources to deploy the sophisticated capabilities of larger martech clouds and bespoke solutions.

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Supplemental Material

Survey Methodologies

Forrester's Q4 2017 Global Cross-Channel Campaign Management Forrester Wave™ Customer Reference Online Survey was fielded to 32 customer references provided to us by the vendors represented in this study. Forrester fielded the survey from November to December 2017. The respondent's incentive included a complimentary copy of this report at the time of publication. Exact sample sizes are provided in this report on a question-by-question basis.

Forrester's Q4 2017 Global Enterprise Marketing Software Suites User Online Survey was fielded to 20 enterprise marketing software suite users with knowledge of acquiring, deploying, and utilizing enterprise marketing software suites. Forrester fielded the survey from September to December 2017. Exact sample sizes are provided in this report on a question-by-question basis.

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These surveys used a self-selected group of respondents with knowledge of cross-channel campaign management and enterprise marketing software suites and are therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report. We also interviewed customers and partners, who wish to remain anonymous.

ActionIQ	Lemnisk
AgilOne	Lytics
Amperity	mParticle
Ascent360	NGDATA
BlueConic	Optimove
Blueshift	Quaero
Boxever	RedPoint Global
Celebrus	Tealium
Evergage	Treasure Data

Endnotes

- ¹ See the Forrester report "[Modernize Your Martech Stack For Moments.](#)"
- ² For example, only 15% of US online adults are willing to share personal information to receive more relevant ads. Source: Forrester Analytics Consumer Technographics® North American Online Benchmark Survey (Part 2), 2018.
- ³ Source: Forrester Analytics Global Business Technographics Marketing Survey, 2018.
- ⁴ Source: Joe Stanhope, "The CDP Paradox: A Chaotic Category Aspires To Address A Chaotic Challenge," Forrester Blogs, March 8, 2018 (<https://go.forrester.com/blogs/thecdpparadox/>).
- ⁵ We received 114 client inquiries between January 1, 2017 and September 28, 2018. Three inquiries were from agencies, and four were from private equity or consulting firms. We define end user as anyone who could potentially buy or use a CDP.
- ⁶ For more on identity resolution, see the Forrester report "[The Strategic Role Of Identity Resolution](#)" and see the Forrester report "[Now Tech: Identity Resolution, Q3 2018.](#)"
- ⁷ Source: Forrester's Q4 2017 Global Cross-Chanel Campaign Management Forrester Wave™ Customer Reference Online Survey and Forrester's Q4 2017 Global Enterprise Marketing Software Suites User Online Survey. See the Forrester report "[The State Of Enterprise Marketing Technology, 2018.](#)"
- ⁸ Source: Forrester Analytics Global Business Technographics Marketing Survey, 2018.
- ⁹ See the Forrester report "[The Next Chapter For Email Marketing.](#)"

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¹⁰ Forrester refers to the marketing clouds as enterprise marketing software suites (EMSSes). See the Forrester report [“The Forrester Wave™: Enterprise Marketing Software Suites, Q1 2018.”](#)

¹¹ Source: Collin Colburn, “Six Key Takeaways From Google Marketing Live 2018,” Forrester Blogs, July 12, 2018 (<https://go.forrester.com/blogs/6-key-takeaways-from-google-marketing-live-2018/>).

“Build a Marketing Data Warehouse,” Google Cloud (<https://cloud.google.com/solutions/marketing-data-warehouse-on-gcp>).

¹² See the Forrester report [“Now Tech: Identity Resolution, Q3 2018.”](#)

¹³ For more on making strategic martech purchase decisions, see the Forrester report [“The Next Generation Of Enterprise Marketing Technology.”](#)

¹⁴ For more on DMPs, see the Forrester report [“The Tools You Need To Master Omnichannel Digital Media Buying”](#) and see the Forrester report [“The Forrester Wave™: Data Management Platforms, Q2 2017.”](#)

¹⁵ Source: Forrester’s Q4 2017 Global Cross-Chanel Campaign Management Forrester Wave™ Customer Reference Online Survey and Forrester’s Q4 2017 Global Enterprise Marketing Software Suites User Online Survey. See the Forrester report [“The State Of Enterprise Marketing Technology, 2018.”](#)

See the Forrester report [“Marketers: Manage Your Supply Chain.”](#)

¹⁶ Marketers already face duplicate capabilities in their tech stacks. In surveys the past year, 40% of B2C marketers who use enterprise martech admitted to having redundancy in the capabilities of their different martech tools. Source: Forrester’s Q4 2017 Global Cross-Chanel Campaign Management Forrester Wave™ Customer Reference Online Survey and Forrester’s Q4 2017 Global Enterprise Marketing Software Suites User Online Survey. See the Forrester report [“The State Of Enterprise Marketing Technology, 2018.”](#)

¹⁷ Both quotes are from a Forrester survey on technologies for our Tech Tide™ report on martech. See the Forrester report [“The Forrester Tech Tide™: Martech For B2C Marketers, Q2 2018.”](#)

¹⁸ See the Forrester report [“The Forrester Wave™: Customer Database And Engagement Agencies, Q2 2018.”](#)

¹⁹ Enterprise marketing software suites (EMSSes) are shoring up their data handling functionality and leveraging acquisitions and organic development to bring incremental data services and identity capabilities into their offerings. See the Forrester report [“The Forrester Wave™: Enterprise Marketing Software Suites, Q1 2018.”](#)

²⁰ Source: Frederic Lardinois, “Arm acquires data management service Treasure Data to bolster its IoT platform,” TechCrunch, August 2, 2018 (<https://techcrunch.com/2018/08/02/arm-acquires-data-management-service-treasure-data-to-bolster-its-iot-platform/>).

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