



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

Focus on Tealium
July 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 [Customer Data Platform \(CDP\) Products PEAK Matrix® Assessment 2023](#), 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)

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

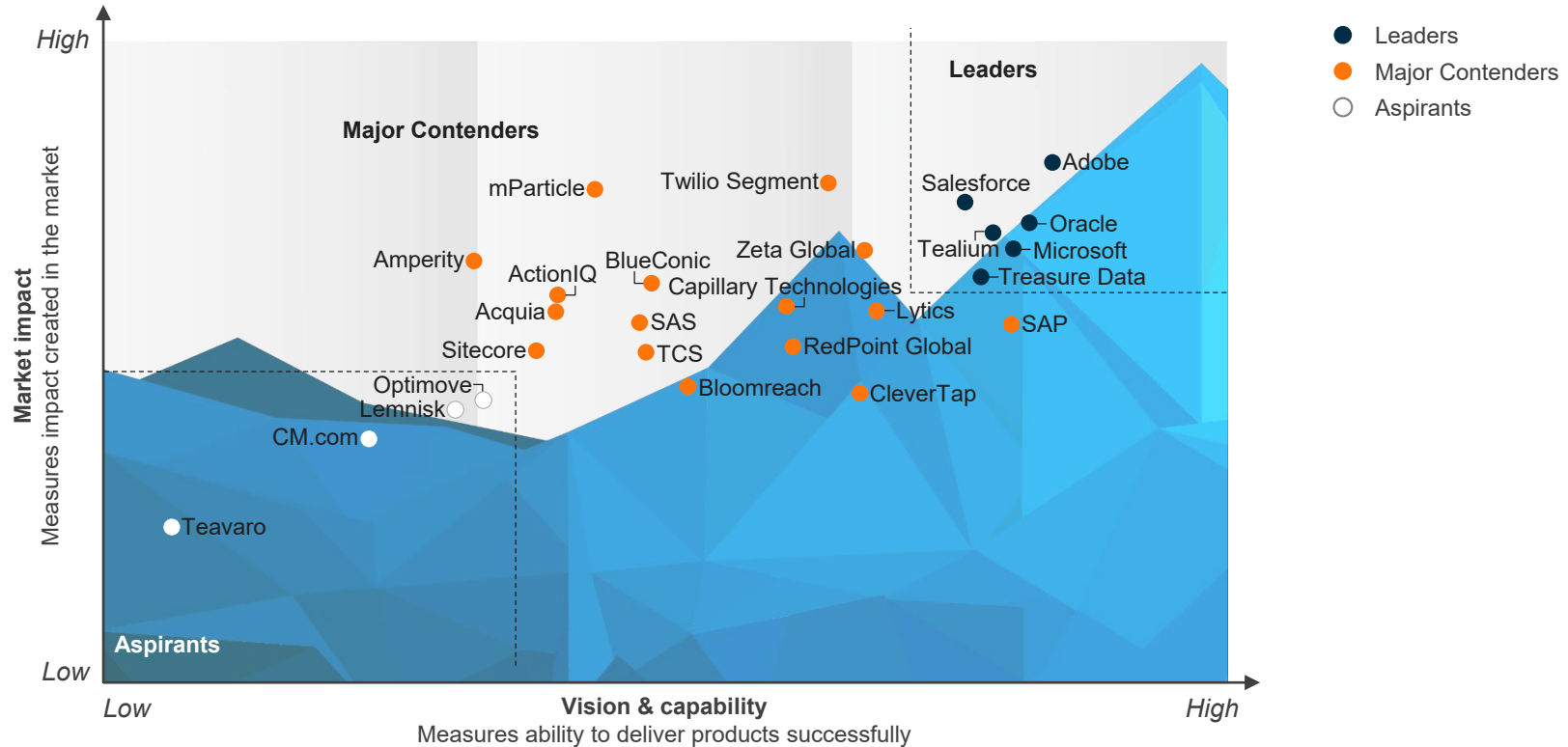
CM.com, Lemnisk, Optimove, and Teavaro

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

Everest Group PEAK Matrix®

Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023 | Tealium is positioned as a Leader

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)

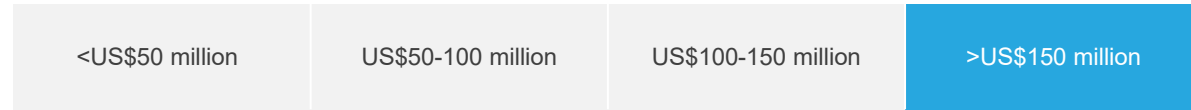
Tealium profile (page 1 of 4)

Overview

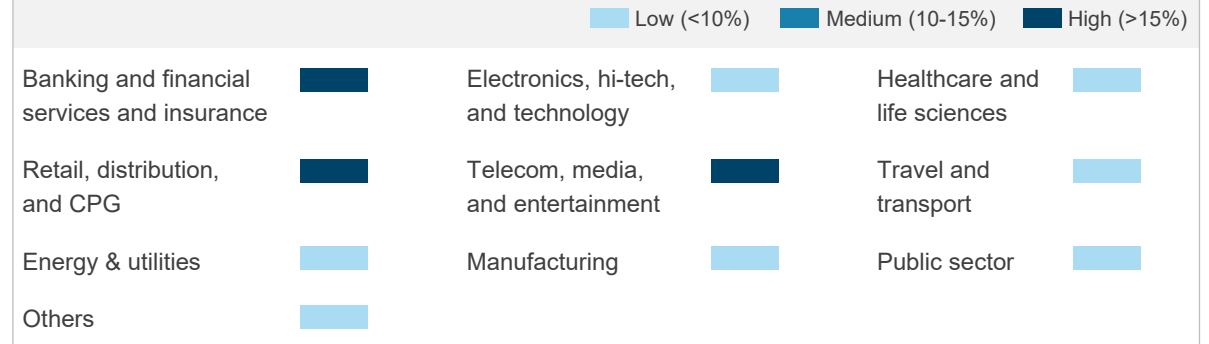
Vision for CDP

Tealium is a data-first CDP that places a strong emphasis on data collection practices and manages data in a neutral, business-centric manner. Tealium envisions its CDP as a pivotal player in driving customer growth, enhancing customer retention, and delivering hyper-personalized experiences.

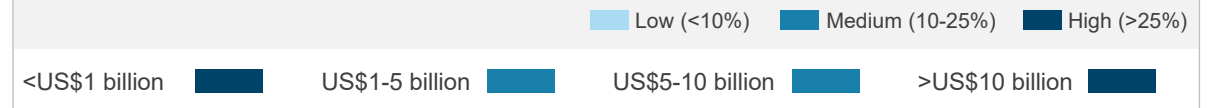
Overall CDP revenue (2022)



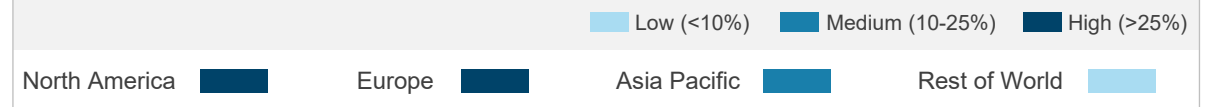
Adoption by industry



Percentage of projects by buyer size (annual revenue)



Percentage of projects by geography



Tealium profile (page 2 of 4)

Case studies

Case study 1

Enhanced the customer experience of a global healthcare company by leveraging omnichannel personalization

Business challenge

The client needed to drive growth while simplifying its complex operating model across ~100 brands on a global scale. It wanted to achieve the following:

- Remove silos and centralize how it managed analytics tagging and data flow from its digital properties
- Optimize Return on Advertising Spend (ROAS) by targeting visitors with relevant and timely messaging
- Provide on-demand Healthcare Professional (HCP) persona information for its sales reps
- Increase engagement with new patients through social channels to attain stronger customer loyalty

Solution

- Tealium implemented its CDP to drive use cases that included data-driven personalization and activation, real-time audiences, better data governance, and vendor flexibility that integrated with the rest of the company's MarTech stack
- Tealium built audiences for HCP personas that were coming onto the website, tracking their online behavior to then send these contacts targeted emails leading to an increase in mail opening rates
- Tealium dynamically changed the search bar on the client's website to be customized for the persona leading to an improvement in visitors clicking on the search bar and an increase in search bar utilization

Impact

- About a 14% lift in open rates
- Approximately 38% drop in website bounce rates
- Almost 32% increase in page views
- Approximately 143% increase in onsite engagement

Case study 2

Leveraged the customer data of an Australian insurance company to drive growth by personalize experiences

Business challenge

The client was operating in the insurance industry in which organizations had a wealth of customer data but were slow to activate it due to often large-scale and siloed organizational structures. The client identified an opportunity to increase customer experience. It wanted to achieve the following:

- Generate targeted insights to improve conversion
- Striking a balance between personalization and privacy

Solution

- The client worked with Tealium to track and combine interactions across its online and offline touchpoints and generate targeted insights to improve conversions
- Tealium implemented its CDP to consolidate data, which extended across different domains and lacked clear ownership
- Tealium implemented its tag management solution to gather website and offline data from its contact and retail centers. It combined this data using to build profiles of potential customers
- Tealium enabled the client to connect its data to other products to create a best-of-breed tech stack that powered automation and personalization

Impact

- Approximately 175% increase in marketable leads
- Almost 71% improvement in online services logins
- About a 145% increase in customer acquisition

Tealium profile (page 3 of 4)











Investments

Key investment (representative list)		
Investment	Type of investments	Details
Partnerships	Technology partners	<ul style="list-style-type: none"> • Meta – partnership includes a multi-year integrated roadmap and dedicated partner resources for enablement across sales, marketing, solutions consulting, and customer success • Google – partnership includes a multi-year integrated roadmap and dedicated partner resources for enablement across sales, marketing, solutions consulting, and customer success • Braze – partnership is for bi-directional integration of customer data to enhance capabilities in first-party data strategy
Partnerships	Others	<ul style="list-style-type: none"> • Accenture – partnership for mutual training and co-selling of resources. Includes developing standardized implementation and solution packages • Capgemini – partnership for mutual training and co-selling of resources. Includes developing standardized implementation and solution packages • WPP – partnership for mutual training and co-selling of resources. Includes developing standardized implementation and solution packages • AWS – partnership has led to the development of 10+ integrations. They have also worked together to develop GTM solutions
Talent		<ul style="list-style-type: none"> • LIFT University – Tealium launched LIFT University in 2022. It is their overarching brand for learning and development programs for all global employees. This host's content is designed by Tealium and provides access to Udemy Business Accounts for all employees • Boost Manager Program – it is an essential training program for managers offering a spectrum of learning such as sharing best practices for engagement teams, fundamentals of performance management, talent management, engagement, compensation, and goal-setting • Elevate Leadership Development Program – this is Tealium's proprietary leadership development academy that incorporates a blend of virtual classroom learning, cross-functional activation pods, and 1:1 professional coaching. As many as 25 global leader participants were a part of this six-month program
Other Investments		<ul style="list-style-type: none"> • CDP Institute – Tealium has developed multiple pieces of joint content and participates in CDP thought leadership webinars regularly • Digital Analytics Association – Tealium has sponsored events and has spoken at multiple meetings hosted by the digital analytics association

Tealium profile (page 4 of 4)

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 LIFT university, manager training programs, leadership programs, and tie-ups with employee training and coaching platform

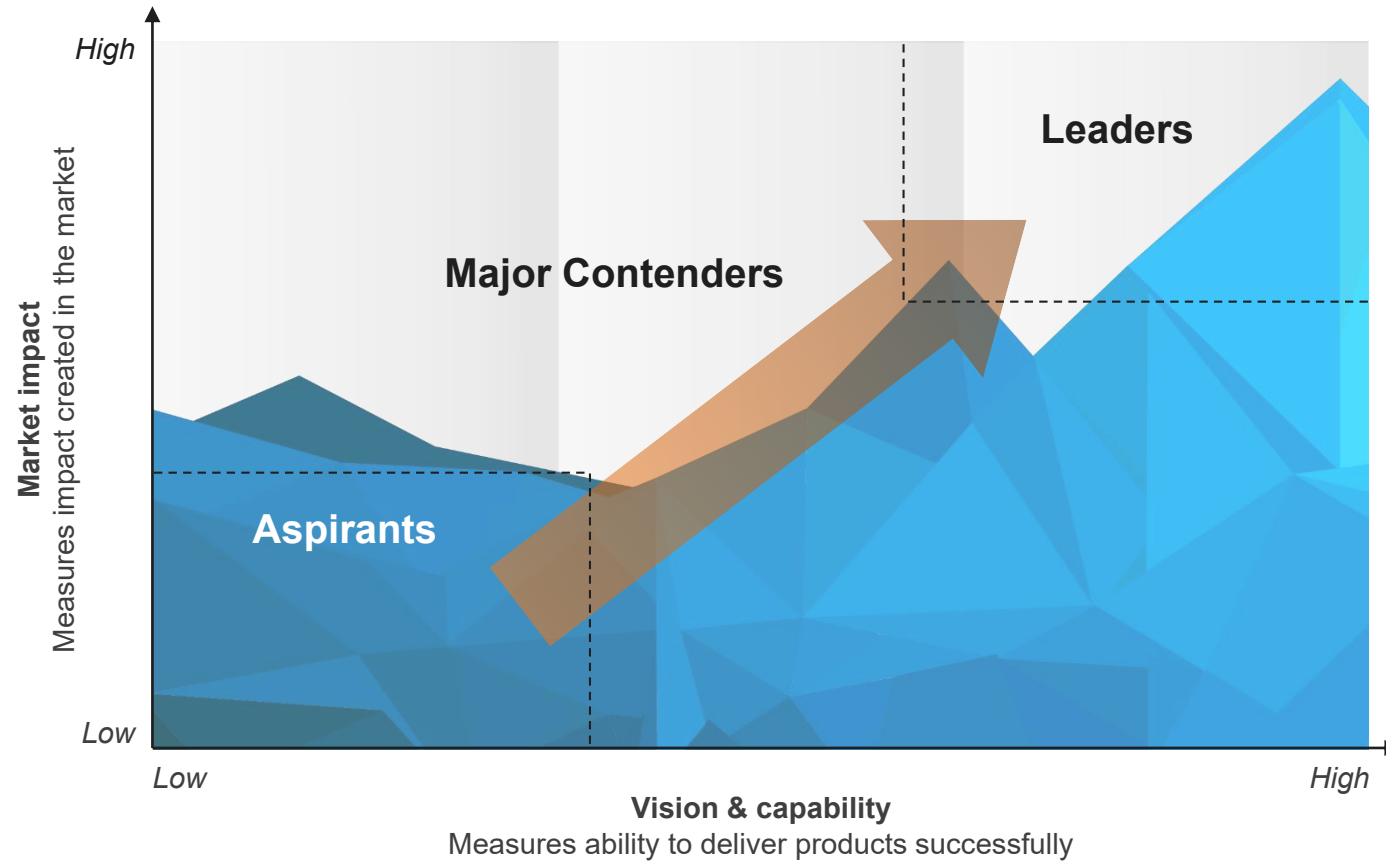
Limitations

- 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

Appendix

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

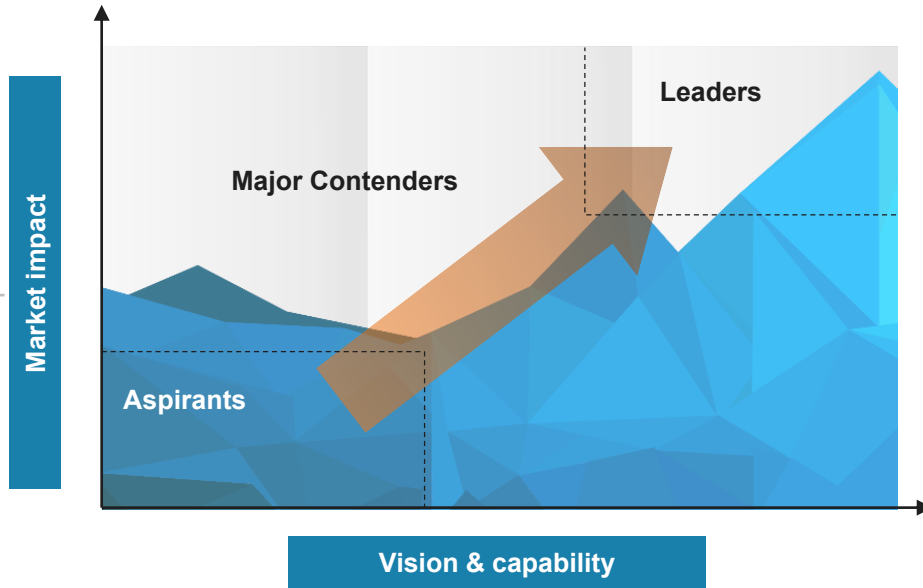
Everest Group PEAK Matrix



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	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	Training, consulting, maintenance, and other support services

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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