



IDC MarketScape

IDC MarketScape: Worldwide AI-Enabled Customer Data Platforms for B2C Users 2026 Vendor Assessment

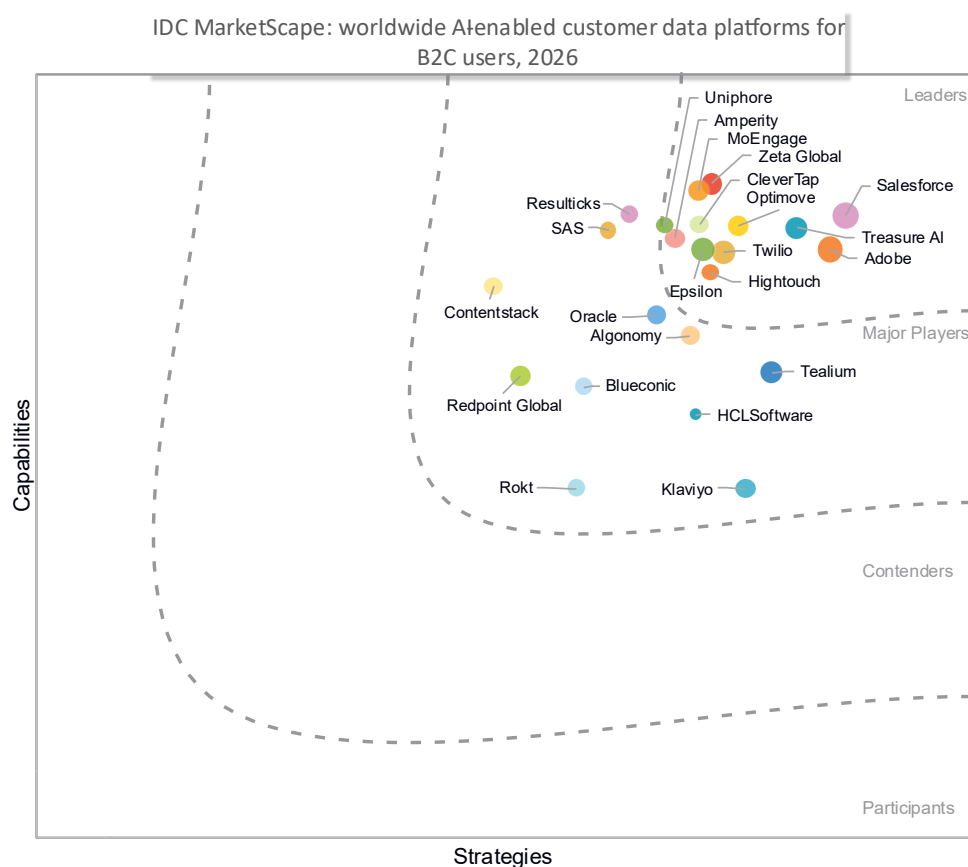
Tapan Patel

THIS EXCERPT FEATURES TREASURE AI AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide AI-enabled customer data platforms for B2C users vendor assessment



Source: IDC, 2026

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide AI-Enabled Customer Data Platforms for B2C Users 2026 Vendor Assessment (Doc # US53952526).

IDC OPINION

B2C organizations evaluating customer data platforms (CDPs) face converging market pressures at once. Customer expectations are rising, paid media costs are climbing, consent rules keep tightening, and AI is augmenting marketing from predictive campaigns toward semiautonomous decisioning, even as personal AI agents are starting to research and compare on consumers' behalf in certain B2C categories. Every one of these pressures depends on the same thing — a clean, identity-resolved, consent-aware view of the customer and its context that humans and machines can act on.

Buyer dynamics

The CDP's traditional role of unifying customer data and activating it across front-office customer experience (CX) functions is still essential. The augmented role, which most buyers and users are now planning for, is for the same platform to serve as the data and context foundation for AI agents and generative AI (GenAI) use cases. The human user needs an intuitive interface, configurable journeys, and reliable activation. The AI user needs reliable profile access, machine-readable context, governed APIs, and feedback loops. From a buyer's perspective, the right CDP serves both well.

Buyers and users continue to underestimate the foundational data-readiness work needed with any CDP. Across the information gathered for this IDC MarketScape evaluation, the most cited reasons buyers replace an existing CDP were data readiness and quality, inability to demonstrate ROI, scalability or real-time performance issues, and AI features that did not work in practice. The underlying data, operating discipline, and the outcomes the CDP is expected to deliver all belong to the organization, and CDPs can amplify them but cannot create them.

The same is true of value measurement. Many B2C CDPs have been running without a clearly articulated business case tied to outcomes the platform is uniquely responsible for, and activity metrics like segment counts, audiences activated, or profiles unified do not hold long-term value. The metrics that defend value are tied to specific use cases, such as reducing customer acquisition costs for first-party audiences, recovering revenue from in-session triggers, reducing churn in flagged segments, and incremental lift over matched

control groups. Buyers and users should commit to that measurement framework with stakeholders before activating the use case.

Key trends shaping an organization's customer data platform operations are as follows:

- **Consumer AI agents.** Personal AI agents are starting to act on behalf of consumers in some B2C categories, discovering and comparing options and potentially completing transactions. For CDP users, this means the customer data the platform owns (e.g., attributes, preferences, consents, intents) must be readable by the external AI agent. At the same time, product, price, and inventory data from other enterprise systems must also be integrated for AI agents. Brands whose CDPs make customer data easy for an agent to access will be in those agent-initiated journeys.
- **Context layer.** The CDP is moving from being a customer data layer to a context layer that both humans and AI agents use to make decisions. Few CDPs already provide customer context (e.g., preferences, intent, sentiment, journey state). Organizational context (e.g., brand voice, compliance constraints) and decision context (e.g., decision traces, decision outcomes, workflows) are the layers users need and must integrate with customer context. Users should ask not only for a customer 360 but for the full set of context across all three areas, how it is governed, and how problems can be traced when an AI agent makes a wrong decision.
- **Business semantics.** The work CDP users have done over the years to define what “a returning shopper,” “a household with rising lifetime value,” or “a customer at risk of canceling” actually means in their business is stored within the platform alongside the warehouse data it operates on, or relies on a warehouse-native semantic layer. That definitional work represents years of accumulated customer data effort that is hard to recreate, and AI agents reading raw customer data without it tend to produce inaccurate decisions.
- **AI decisioning.** The work of running marketing is shifting away from building step-by-step campaign flows and toward setting objectives, guardrails, and brand voice that a decisioning agent then operates within. This works only when the CDP is where the agent reads context, where consent rules are laid out, and where humans and AI agents can learn from outcomes to optimize future decisions. As CDP vendors add AI decisioning capabilities, users should look past traditional campaign management and ask how the platform decides, acts, and learns from the outcomes.
- **Unstructured data.** Most B2C profiles today are built from structured signals such as events, transactions, and attributes. Contact center transcripts, chat logs, product reviews, and social media text are usually outside the CDP. That balance is shifting. CDP users will start bringing unstructured sources into the profile, where models turn them into sentiment scores, intent signals, and other attributes the rest of the platform can use. Working with unstructured data and context requires skills across martech, data engineering, and AI that most teams are still building.

- **Conversational and natural language (NL) interfaces.** The way marketing and business users interact with the CDP is changing. CDP users will spend less time clicking through segment builders and journey canvases, and more time asking the platform for what they want in plain language. Prompts are getting more specific for building a segment, sketching a journey, asking for an insight, or running a what-if simulation. More time and effort will shift toward refining questions, developing judgment, and knowing when the platform's answer can be trusted.
- **Data collaboration.** Direct uploads of raw audience data to retail media networks, walled gardens, and partner brands are giving way to clean rooms, encrypted joins, and other methods that keep data in place. The shift is being driven by tightening privacy rules, walled-garden policy changes, and consumer expectations that personal data will not be handed around. For CDP users, rather than audience uploads, more time and effort will be required to govern data collaboration requests.
- **Warehouse-native processing.** More B2C brands are moving customer data toward the cloud data warehouse or lakehouse, with the CDP querying it directly through zero-copy access. As warehouse providers introduce CDP capabilities — such as profile unification, identity resolution, and audience activation directly on governed data platforms — customer data moves to the warehouse faster than business logic builds up inside packaged CDPs. CDP users will need to decide which workloads belong in the warehouse versus the CDP, and how identity, consent, governance, and activation responsibilities are divided between them. This requires buyers to make conscious choices about the customer data architecture, deciding which capabilities to centralize and retain in the warehouse or CDP, balancing governance, latency, and cost trade-offs.

B2C CDP use cases

The B2C CDP use cases that surfaced consistently across the IDC MarketScape evaluation and IDC's reference interviews are summarized in Table 1, along with the value metrics buyers should track to defend each one. Some are foundational use cases that CDPs have been expected to deliver for years; others are appearing on enterprise road maps. Prioritizing and sequencing these based on revenue impact, data readiness, and team capacity is what separates a CDP that delivers measurable outcomes from one that underdelivers.

TABLE 1**Customer data platform — B2C use cases**

Use case	Description	Value metric to track
Identity resolved unified customer 360	Resolves anonymous and known signals across web, mobile app, point of sale, contact center, loyalty, and partner channels into a persistent, individual- and household-level profile, with deterministic and probabilistic matching, governed consent, and near-real-time updates	Identity match-rate uplift, profile completeness, consent capture and refresh rate, data freshness from event to profile
Real-time audience activation across owned, paid, and suppression channels	Builds first-party segments from unified profiles and syncs them in real time to owned channels and to paid channels for prospecting, suppression of existing customers, look-alike seeding, and value-based bidding, including streaming offline conversions back for measurement	Customer acquisition cost reduction on first-party audiences, ROAS uplift, suppression coverage of retained customers
Cross-channel personalization and journey orchestration	Coordinates experiences across email, SMS, push, in-app, web, contact center, and increasingly in-store using unified profiles, real-time behavioral signals, and content or offer rules, including anonymous-to-known onboarding and life-cycle progression from new to active to lapsed and dormant customers	Conversion rate uplift, customer lifetime value progression by life-cycle stage, cross-channel attribution lift, journey completion rate
Predictive engagement: Churn, win-back, and lifetime value	Scores churn risk, propensity to buy, and predicted CLV from CDP-resident behavioral, transactional, and engagement signals, and triggers retention, upsell, cross-sell, and reactivation actions through the channel most likely to perform for each individual	Churn rate reduction in flagged segments, reactivation rate on win-back programs, revenue recovered per quarter, predicted versus realized CLV by segment
Conversion recovery from real-time high-intent triggers	Detects cart, browse, form, checkout, and app drop-off signals in real time and responds through the appropriate channel within a useful window, including price-drop, back-in-stock, milestone, and geofenced triggers, with session-level orchestration to avoid double messaging	Recovered revenue from triggered actions, incremental orders versus matched control, trigger to conversion rate
AI agent grounding, agentic commerce, and consumer-side agent readiness	Supplies governed, consent-aware customer context, organizational context, and decision context to the brand's own AI agents and to emerging consumer-side AI agents through standards such as Model Context Protocol, with audit and policy enforcement on every agent action	Share of decisions executed by agents under guardrails, agent-attributable revenue, policy violation rate, brand visibility and conversion metrics through consumer-side AI assistants

Source: IDC, 2026

The aforementioned trends and use cases point to a CDP that does more than unify customer data; it anchors the customer context that humans, AI agents, and external systems all draw from. What this all adds up to for CDP users is a longer-horizon decision than most marketing technology purchases, and a wider set of stakeholders. The teams that work directly with customers and those that handle customer data both need to be involved in the selection, implementation, and governance of the CDP. How the team handles organizational data readiness, the operating model, and outcome measurement around the CDP will determine the value it can deliver.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The criteria for inclusion of CDP vendors in this IDC MarketScape analysis are as follows:

- The offering should be commercially available for use as a discrete, standalone CDP product or as part of a customer experience or marketing suite and purchased by customers for at least two years.
- The product must natively provide a core set of capabilities and functions for designing, activating, and managing customer data, according to IDC's market definition (see the Appendix).
- Most of the vendor's CDP solutions must be for use cases in marketing, advertising, customer service, retention, or loyalty functional areas within B2C organizations.
- Most of the vendor's users must be in the following functions: marketing, marketing technology, data science and IT, data operations (DataOps), and privacy and compliance.
- IDC will consider and include new product features and capabilities introduced through the calendar year 1Q26 as part of vendors' strategies and capabilities evaluation.
- Vendors must have more than 100 employees focused on AI-enabled CDP and/or demonstrate revenue of more than \$25 million from this area. In addition, vendors must be able to provide two related customer references.
- Based on input from industry peers, publications, agencies, end-user brands, and revenue analysis, IDC analysts should recognize vendors as active players in the AI-enabled CDP for the B2C space.
- The product must be offered, supported, and available on a worldwide basis (i.e., in at least two global regions).

ADVICE FOR TECHNOLOGY BUYERS

Buyers that treat the CDP as a static system of record will get exactly that. Buyers that treat it as a customer operating model, with AI agents and human users as coequal consumers of

data and context, will be better positioned. Besides the IDC advice covered in this section, the simplest one is to pick a CDP that the organization can grow with. The CDP category is in motion, the architectural choices are long term, and the operational discipline behind the CDP matters at least as much as the platform itself. In detail:

- **Measure value in business outcomes.** Focus on a set of outcome-oriented metrics tied to use cases the CDP is uniquely responsible for — customer acquisition cost (CAC) offset by paid-media suppression, recovered cart abandonment revenue, and churn reduction within flagged cohorts. Instead of counts of unified profiles or segments built, or a long list of attributes, provide the ability to measure how and when these data attributes are used by cross-functional teams.
- **Close the skills gap.** Most B2C CDP setbacks come from under-resourced teams. Buyers need the right mix of martech, data engineers, marketing analysts, governance experts, and users with data modeling and context engineering knowledge and expertise. Budget for upskilling, retraining, and hiring based on the CDP use cases that matter most and the incremental value they will drive.
- **Treat the CDP as a change management project.** When B2C CDP work breaks down in production, the cause is often poor coordination across teams, not the platform alone. Before go-live, walk marketing, data, product, and compliance teams through likely failure points — broken consent sync, incorrectly stitched profiles, journeys not optimized for the right audience, or AI agents taking actions they were not approved to take. Assign an owner to each risk before launch or go-live.
- **Get pricing transparency on the B2C cost variables.** Profiles, event volume, AI token usage per action, and channel send volume can move the total cost in B2C CDP use cases. Insist on forecasting that reflects your seasonality (peak shopping events, product launches, traffic spikes) and outcome dashboards tied to first-party audience CAC and recovered revenue. Vendors that offer predictable pricing, including clear treatment of AI usage, deserve closer evaluation.
- **Require a B2C context layer road map.** Ask each vendor how all three layers — customer (session-level behavior, recent journey, household and loyalty tier state, recent service interactions), company (inventory by SKU and store, the active promotion calendar, brand voice for content variation), and system (workflows and decision traces) — are produced, governed, and exposed to agents natively and through open standards.
- **Define data fitness rules.** Every audience, score, prediction, and recommendation that leaves the CDP should carry a confidence signal that downstream users and AI agents can read. Press on questions about how current the profile is, whether the consent is current, whether the model was retrained recently, and whether the customer is actually distinct or possibly a duplicate. The goals need to be customer data whose quality is visible to humans and agents acting on it.

- **Establish a unified system of customer data and context.** Customer engagement, commerce, digital experience, and campaign platforms now often include their own customer profile and event layer. Without a clear decision, teams can end up with three or four different versions of “who the customer is” across tools. Buyers should decide which layer is authoritative for cross-channel identity, consent, audience definitions, and suppression logic. Every other tool should consume from that layer rather than rebuild the same logic inside its own walls.
- **Build the exit path into the contract.** The CDP category is shifting across platform-resident, warehouse-native, and hybrid models. Vendor acquisitions have also redrawn the market more than once in recent years. Buyers should negotiate, in writing, the right to export every customer profile, attribute, identity rule, consent record, and model output in a portable, usable format.
- **Prepare for consumer-side AI agents in your B2C category now.** Personal AI agents will start acting on consumers’ behalf in B2C categories well before most brands are prepared. The CDP’s role here is to provide the customer-side context (e.g., identity, preferences, intent signals, loyalty status, recent journey, and consent state) in a clean, machine-readable format. To be useful, that context also needs to connect with product, commerce, pricing, and inventory systems so agents can act on current, relevant information.

VENDOR SUMMARY PROFILES

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

Treasure AI

According to IDC analysis, Treasure AI is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide AI-enabled customer data platforms for B2C users.

Headquartered in Mountain View, California, Treasure AI offers the Intelligent CDP, built around a unified customer record it calls the Diamond Record. It unifies first-party, anonymous, and off-platform data into Diamond Record, then activates that data through AI applications. Treasure AI has built three interconnected product layers: the Intelligent CDP, an AI Agent Foundry hosting purpose-built agents, and an AI Marketing Cloud for omni-channel activation, including email and paid media. The platform supports batch and real-time data, traditional and composable deployment models, and activation across owned and paid channels. Treasure AI is most relevant to large enterprises, especially those operating across multiple brands, regions, and lines of business in retail, CPG, automotive, and media/entertainment verticals.

Strengths

- **Hybrid deployment model.** Treasure AI supports flexible deployment through a composable architecture that allows enterprises to run compute inside their cloud data warehouse or within the CDP itself for real-time use cases. Zero-copy capabilities enable AI agents and models to operate on data wherever it resides without requiring full data migration.
- **AI agent-based workflow automation.** Treasure AI is extending its Intelligent CDP with AI Agent Foundry and Marketing Super Agent (now known as Treasure AI Studio) to support data onboarding, audience creation, and journey design on top of unified profiles. Its expanding catalog of prebuilt agents gives the platform a differentiated position for enterprises that want AI embedded directly into workflows.
- **Shared customer model.** Treasure AI's Diamond Record and Parent Segment architecture let teams define attributes, behaviors, scores, and relationships once and reuse them across segmentation, journeys, activation, analytics, and AI workflows.
- **Contextual real-time orchestration.** Treasure AI links live events, streaming segments, journey logic, and personalization APIs to a shared customer profile, allowing brands to update eligibility, suppression, content, and next best actions as customer behavior changes.

Challenges

- **Nontechnical user experience.** Treasure AI has historically aligned more naturally with technically proficient users. The company now offers natural language interfaces, AI-native Audience Studio, and AI agents that automate workflows for marketers, though the depth of underlying data model configuration can still be a learning curve for advanced use cases.
- **Campaign optimization maturity.** Treasure AI supports A/B testing, automated drift detection, automated value recommendation with impact quantification, but the more advanced closed-loop campaign optimization capabilities, including in-flight course correction and automated model feedback loops, are on the road map.
- **Identity resolution usability.** While Treasure AI's identity resolution capabilities are competitive, visual UI tooling for identity inspection is an area for further improvement. ID Unification Analysis Agent provides insights and recommendations on identity resolution quality and validity in natural language. Clearer visual transparency into match logic, merge behavior, and profile stitching would improve day-to-day usability for business and technical users alike.
- **AI and CDP investments.** Treasure AI is extending its footprint into broader AI-native marketing, AI agents, and decisioning. That broader strategy can be attractive for new buyers or markets, but it also increases the importance of demonstrating

continued depth, clarity, and sustained investment in foundational CDP capabilities. While this broader positioning can intersect with adjacent martech and platform suites, including offerings from some partners, Treasure AI positions its composable architecture and partner-led go to market as complementary to, rather than a replacement for, those tools.

Consider Treasure AI when

Treasure AI is relevant when a B2C enterprise needs a CDP to function as shared customer intelligence across multiple brands, regions, channels, and teams. It is particularly suited to organizations that need first-party identity, batch and streaming signals, paid media and owned-channel activation, personalization, and journey orchestration to operate from the same governed customer foundation in retail, CPG, automotive, media, and other data-intensive consumer environments.

It is also relevant when buyers are assessing how a CDP would fit alongside existing warehouse, engagement, and activation investments, especially in environments where deployment preferences and the division of responsibilities between data and marketing teams are still evolving. Organizations that want AI applied to onboarding, audience creation, analysis, and campaign workflows while maintaining governance and human oversight should consider Treasure AI.

APPENDIX

Reading an IDC MarketScape graph

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

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

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

Customer data platform (CDP) applications aggregate, enrich, and unify structured and unstructured data from multiple sources and formats to create dynamic, identity-resolved customer profiles. The CDP orchestrates the flow of data and profiles, along with associated segments, journeys, predictive insights, decisioning outputs, and consent flags across marketing, advertising, commerce, service, retention, loyalty, and other business functions. CDPs enable brands to activate customer data to deliver personalized engagements and experiences, both human led and AI agent led, with proper consent, privacy, and governance.

CDPs support warehouse-native, standalone platform, and hybrid architecture patterns, each carrying different trade-offs around governance, latency, cost, portability, and scalability. The right pattern for any given buyer depends on data gravity, IT maturity, regulatory exposure, and the velocity of B2C decisions the platform must support. Capabilities considered core to CDPs include data aggregation, schema management, data quality, and observability; identity resolution; data collaboration; composability; governance, consent, and preference management; segment, audience, and journey building; embedded or integrated predictive and generative AI; analytics and reporting; and omni-channel activation across owned and paid channels.

The role of the modern CDP extends beyond data unification. In the future, CDPs need to take on an expanded definition and serve as the context layer by exposing customer context (e.g., intent), organizational context (e.g., brand voice), and decision context (e.g., how the decision was made, who made it) that humans and AI agents can act on. Decisioning falls within the same scope, either embedded in the platform or interoperable with adjacent engines, with the CDP supplying the data, context, and policy signals that drive the next best semiautonomous or autonomous action, offer, channel, and timing for each customer interaction based on a marketing or CX objective.

Related research

- *Beyond Customer Data: The Context Foundation AI Agents in CX Are Missing* (IDC #US54429926, March 2026)
- *The State of Agentic Marketing in Large Enterprises* (IDC #US54255926, February 2026)
- *Agent Economics: Adoption and Delivery Model for Agents, Actions, and Tokens* (IDC #US54034725, December 2025)
- *Strategic Framework and Road Map for Agentic Innovation Use Cases* (IDC #US53899125, November 2025)
- *Agentic Mesh for CX: Automating End-to-End Customer Experience Management* (IDC #US53802225, October 2025)
- *Market Analysis Perspective: Customer Data Platform Applications, 2025* (IDC #US52866425, October 2025)
- *Worldwide Customer Data Platform Applications Software Forecast, 2025–2029* (IDC #US51619624, July 2025)

Synopsis

This IDC study evaluates vendors of customer data platforms (CDPs) focused on B2C users and use cases. The CDP today sits at the center of how brands serve customers across marketing, advertising, commerce, and service, and increasingly across the AI agents acting on each side of the customer relationship. Customer expectations for personal, in-the-moment experiences keep rising; paid media costs keep climbing; and consent rules at the consumer scale keep tightening. AI is augmenting marketing from predictive campaigns toward semiautonomous decisioning, and personal AI agents are starting to research and compare and, in the future, will transact on consumers' behalf. The result is a CDP decision that needs a longer horizon and a wider set of stakeholders. This study examines the buyer dynamics shaping the B2C CDP market, the forward-looking trends reshaping how CDPs are consumed by humans and AI agents alike, the use cases B2C organizations are building toward, and the buyer-side advice that determines whether the investment delivers.

"The next phase of B2C personalization will depend on whether the brand's customer data and context are trustworthy enough for humans and AI agents to act on with the same confidence," said Tapan Patel, research director, AI-Enabled Customer Data and Analytics, IDC. "The CDP is the layer that makes that possible, and the buying organization's discipline around data readiness, operating model, and outcome measurement will also determine how much of that personalization the customer actually experiences and cares about."

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

Global headquarters

One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com

Copyright and trademark notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit idc.com/about/offices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2026 IDC. Reproduction is forbidden unless authorized. All rights reserved.