



THE MODERN MARKETING DATA STACK

How data-forward marketers are redefining strategies to unify, analyze, and activate data to boost revenue

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THE STATE OF PLAY

So much has changed in the year since we launched the first edition of The Modern Marketing Data Stack in 2022. Recessionary pressures and the imperative to do more with less, and to be more focused with technology investment—especially the transformative power of AI—are driving change. Concerns about privacy, at both the consumer and legislative levels, are driving change. The pressure to get more value from data—to know more, target better, act faster—continues to drive change.

Marketers eager to contribute to the bottom line invest in technologies to extract actionable intelligence from disparate swaths of data, and struggle to show overnight results. Late last year, [LinkedIn reported](#) that “77% of CMOs globally feel under pressure to prove greater short-term ROI on their marketing campaigns,” and that “90% of marketers say improving CFO understanding of ROI is key to bolstering future budgets.”

This demand to deliver short-term proof of value can hamper strategic marketers, who see investments in modernizing their marketing data stack as foundational to success. Making sure that any short-term optimization also fits into the long-term roadmap isn't easy.

Yet data technologies are the only way forward. Both B2C and B2B customers are more careful than ever in their spending, and more demanding than ever in terms of the buying experience. Thus, resource-constrained marketers can only reach the right customers—and increase sales—through personalization and segmentation. Carefully targeted

advertising and marketing can help businesses acquire new customers, and build brand affinity with their existing audience, faster and more efficiently. Technology, especially fast-developing AI capabilities, will be essential to these goals.

In addition to the pressures provided by global economic forces (or a demanding CEO), there are four other drivers we must consider:

- **The accelerating convergence of advertising and marketing technologies**
- **The advent of advanced artificial intelligence tools, including large language models (LLMs) and generative AI**
- **Rising concerns (and regulatory requirements) around data privacy, which can significantly affect how marketers understand and target their audiences**
- **The increasing need for a unified approach to data, a single source of truth that can be mined for accurate, powerful insights**

In the end, success is determined by an organization's agility—how quickly it can make strategic decisions and refine them to optimize the outcomes. A robust technology stack is essential to making smart, data-driven decisions; to executing effectively; and to gathering critical insights to improve over time.

EVOLVING THE MARKETING DATA STACK

Every company has an array of data technologies and marketing solutions. But rather than a collection of disjointed tools, companies need a unified marketing data technology stack to understand their audiences and execute effective campaigns in a fast-moving, multichannel world.

At Snowflake, we evaluated the technologies employed by more than 8,100 customers as of April 30, 2023, across the Data Cloud (a number that has since grown to more than 8,500). We are able to identify the most common and fastest growing among them. (See **Methodology** for more details.) Thanks to the unique capabilities of the Snowflake Data Cloud, customers can unify their data on a single platform with governed access. They can natively apply AI and machine learning for advanced insights, connecting to their tech stack to drive customer engagements and impact. As such, we have a unique vantage point to understand the partners and solutions that organizations are adopting as they optimize their marketing data stack.

This year's report takes the inaugural 2022 edition several steps further. A year later, we've seen evolution both in the marketing space generally and in the specific tools and solutions that power marketing programs.





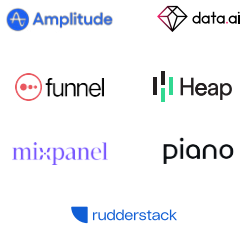
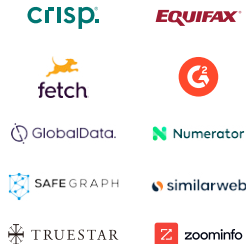
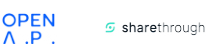
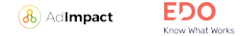
THE REVISED STACK

The careful reader will note that we've revamped the diagram of the modern marketing data stack this year. The reasons are fourfold.

- First, we're making a clearer distinction between the foundational data technologies that every company needs, across all functions and teams (such as data integration, business intelligence, and AI) and the marketing and advertising-specific technologies that sit atop that foundation (think identity and activation, and specific measurement tools). For example, RudderStack and Funnel support marketing and advertising data capture, and carry unique capabilities for domain-specific data integration compared to the providers highlighted in the Integration & Modeling category, such as dbt Labs and Fivetran, which can cover a broader set of uses.
- Second, this year's report particularly reflects the continuing convergence of adtech and martech. The strict separation of advertising technologies that work in the paid space, and marketing technologies that reflect efforts on owned properties such as one's own website, is collapsing. (More on that to follow.)
- Third, we're acknowledging specific changes dictated by the market, including:
 - The rising importance of measurement in an era of economic uncertainty and greater focus on ROI
 - The greater regulatory and consumer interest in privacy enhancement
 - The increasing consolidation of marketing and advertising requires that platforms that traditionally operate exclusively in the adtech space also be included in the analysis
- Fourth, frankly, is that the Snowflake Data Cloud is growing quickly. We've seen remarkable momentum in the martech/adtech ecosystem, with hundreds of applications now powered by Snowflake, allowing us to expand and refine categories as our customers adopt a broader range of powerful marketing technologies.



SNOWFLAKE DATA CLOUD

ANALYTICS & DATA CAPTURE²**LEADERS****ONES TO WATCH****ENRICHMENT²****LEADERS****ONES TO WATCH****IDENTITY & ACTIVATION²****IDENTITY & ONBOARDERS****LEADERS****ONES TO WATCH****CUSTOMER DATA ACTIVATION****LEADERS****ONES TO WATCH****ADVERTISING PLATFORMS****LEADERS****ONES TO WATCH****MEASUREMENT & ATTRIBUTION²****LEADERS****ONES TO WATCH****INTEGRATION & MODELING¹****LEADERS****ONES TO WATCH****BUSINESS INTELLIGENCE¹****LEADERS****ONES TO WATCH****AI & MACHINE LEARNING¹****LEADERS****ONES TO WATCH****PRIVACY-ENHANCING TECHNOLOGIES¹****LEADERS****ONES TO WATCH**¹ Categories that require an active SPN agreement² Categories that require either an active SPN agreement or Marketplace agreement

One caveat is that while we place each company within a specific category in the stack, many of these providers offer technologies that straddle two or more categories. We aim to include them where they are most vital or, according to our data, are a particularly strong performer. Consider LiveRamp. While it appears in Identity & Onboarders, it also offers functionality for first-party data activation as its offering continues to evolve. Similarly, Twilio Segment lands in customer data activation, but is very active in the analytics and data capture space, too. Conversely, RudderStack, while listed as a leader in analytics and data capture, is also widely adopted for profile unification and data activation.

It's also important to note that providers in the same category are not necessarily competitors. Often, they co-exist in a customer's stack. Fivetran and dbt Labs are often seen together with many customers; similarly, so are Hightouch and Braze in the activation category. This last example clearly demonstrates how onboarding and activation can complement each other. While onboarding and activation are often used interchangeably, many customer stacks have an onboarding and activation platform working side by side (for instance, in the example above, Hightouch onboards the data to Braze to drive the activation for owned channels).

Finally, in terms of providers who straddle many categories in the marketing data stack, Salesforce and Adobe stand out for the sheer breadth of their offerings. The integration with both of these platforms unlocks compelling opportunities for the many marketing organizations that have built their marketing data stack in the Data Cloud and use Salesforce or Adobe.

Salesforce offers a full suite of AI, data, and CRM capabilities that are tightly integrated with the Snowflake Data Cloud. For instance, customers can leverage their data and insights in Snowflake and Salesforce together to personalize the customer experience from campaign to purchase to support. We do not break down data to identify which organizations use Salesforce Marketing Cloud capabilities, say, versus its CRM capabilities in Sales and Service Cloud. The one exception is Tableau, a Salesforce acquisition that we're able to measure as a discrete product in the business intelligence category. Organizations that work with both Snowflake and Salesforce can leverage bi-directional, zero-ETL data sharing between platforms, to drive deeper insights, build richer customer profiles, and ultimately personalize each step in the customer relationship, at scale and across industries.

Adobe spans multiple categories in the marketing data stack and is tightly integrated with the Snowflake Data Cloud. Adobe Campaign offers customers the ability to orchestrate cross-channel campaigns across email, mobile, and online and offline channels by integrating with the Snowflake Data Cloud. This integration enables marketers to run more campaigns, increase engagement, remove bottlenecks and data friction, and operate at scale with higher concurrency and speed. Due to the breadth of its many offerings across multiple categories, we do not analyze which of those capabilities are being adopted by customers.

CAVEAT:

MMDS IS NOT (JUST) MARTECH

As we noted in last year's report, the modern marketing data stack is distinct from the martech stack. The latter can include CRM platforms, automation solutions, and SEO and social media management tools. Martech solutions generate a lot of the data that feeds the larger marketing data stack, and are a component of the stack.

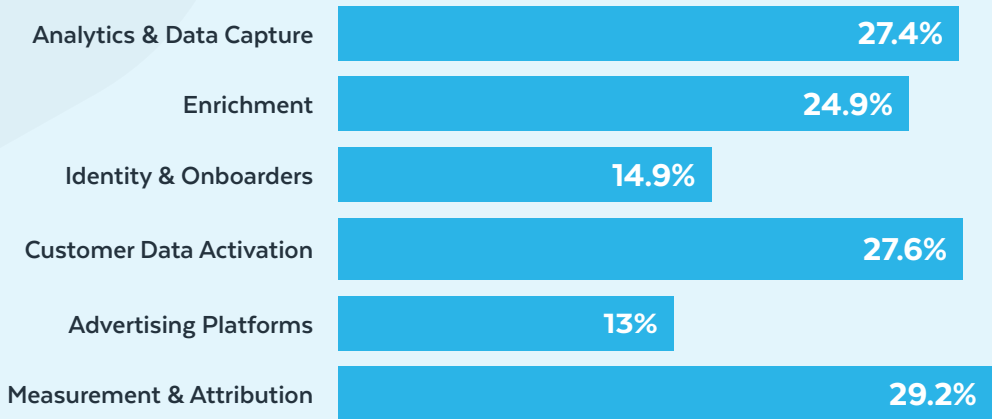
MARKETERS EMBRACE (AND EVOLVE) THEIR STACK

In the year since we first reported on the state of the modern marketing data stack, we’ve seen considerable growth across every category. As the chart shows, the providers we list in each category have seen, cumulatively, an increase in customers on the Snowflake Data Cloud ranging from the low teens to nearly 30%.

That signifies that marketers understand the power of the modern marketing data stack, particularly around unifying data and preserving privacy. We, of course, are seeing them adopt these platforms on Snowflake, which unifies the data layer for their entire data stack. This shows a desire by these marketing orgs to take control of their data and place it in a robust environment that allows them to build their stacks with best-of-breed providers.

Notably, the three fastest-growing categories—Measurement, Customer Data Activation, and Analytics—represent sophisticated use cases. They’re what comes after the initial step of unifying your data to create a single view of your customer. (The growth of Measurement in particular is no surprise given the macroeconomic climate and the need to prove, and improve, ROI.) That “customer 360” perspective is foundational, and what we’re seeing this year is a greater number of marketing orgs moving past the foundational stage to deliver at the next level. Which is not to say that the entire market has moved on. Breaking down data silos is still very much top of mind for a large chunk of the market, explaining the healthy growth of Integration & Modeling and Analytics & Data Capture.

Growth of marketing/advertising-specific tools in 2023



Adoption has surged for marketing tools across the modern marketing data stack. Growth represents percentage change in aggregate number of customers for the providers appearing in each category, from April 4, 2022, to April 3, 2023. For more information, refer to the **Methodology appendix**.

And speaking of foundational, we also saw notable growth in customers adopting the data stack foundational tool categories. Integration and Modeling grew 26.3% and Business Intelligence is up 22.7%.

The adoption of privacy-enhancing technologies is also on a dramatic upswing. Rather than measure the amount of data being analyzed in clean rooms, which could be skewed by a few power users, we looked at the number of clean room connections, and found that they’d increased 7x year-over-year. That’s very fast growth, but it’s not surprising, considering key trends in the marketing industry. Marketers are shifting to first-party data strategies, often depending on collaboration to fill gaps in their data sets, which explains the growth in enrichment and the

concurrent need to ensure appropriate privacy. Both imperatives—greater collaboration, greater attention to privacy issues—can be achieved only with the right technology, which is where clean rooms come in.

AI & Machine Learning is up 15.5%; that lower growth rate tracks with AI as a nascent and fast-growing category. Certainly 2023 has been the year of AI excitement, around large language models and generative AI in particular, and we believe adoption in this category will surge next year.

FOUR FORCES RESHAPING MARKETING

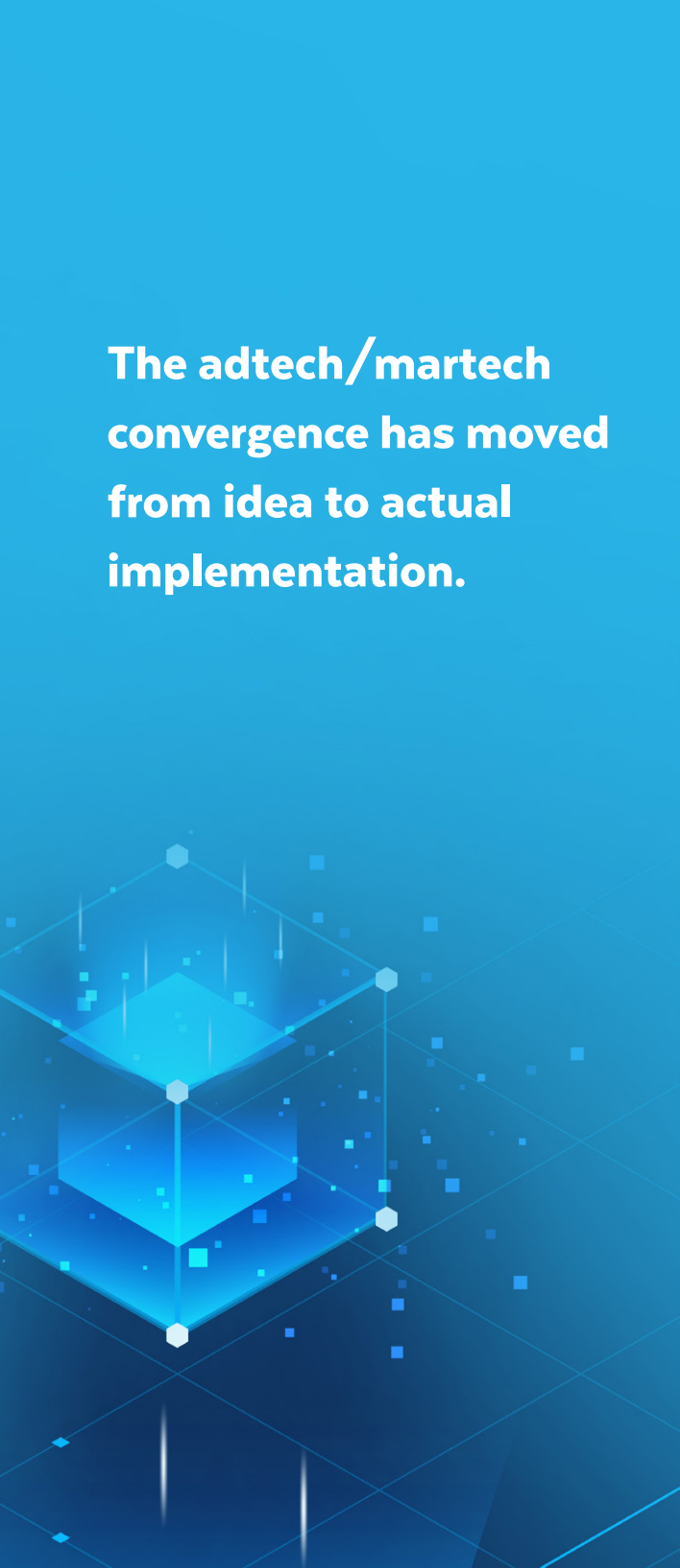
In addition to the economic pressures to contribute more value, and prove it ASAP, the art and science of marketing is being reshaped by the rapid convergence of adtech and martech, the emergence of LLMs as the hottest area of AI, issues around data privacy, and the imperative to focus on a unified approach to data as an antidote to silos, security/governance headaches, and costly inefficiency.

1. ADTECH/MARTECH CONVERGENCE: WALLS COME DOWN

The technologies that support advertising and marketing activities, respectively, grew up independent of one another, just as advertising and marketing teams were usually separate, or at least not tightly integrated. The ecosystem of tools to manage paid channels was therefore separate from the tools to manage owned channels. To manage paid channels, we got ad servers, ad exchanges, demand- and supply-side platforms, paid and social management platforms, and one set of measurement tools. To manage owned channels, we got CRMs, email marketing systems, SEO, and another set of measurement tools.

Over the last decade or so, the two disciplines and their respective tools have increasingly converged. This convergence has been driven largely by a number of factors:

- **The frenetic and fragmented media landscape means that marketers have to work harder to both identify and reach their target audiences.** Guiding a new customer from first impression to loyal fan involves many touches across different stages of the journey. Doing it right requires a precise understanding of who your target is (when the data may be siloed in various martech or adtech tools) and where and when to deliver your message (which may be complicated if your marketing and advertising campaigns are not coordinated).
- **There's a lot of data out there to help with exactly that challenge. But that data is largely fragmented, too—siloed in specialized applications.** A business may have a lot of information about a potential customer's interests and behaviors scattered ineffectively across a dozen solutions used by the advertising, marketing, and sales organizations.
- **Inefficiency costs money.** Think of the technologies connecting a marketer who wants to advertise and the publisher who has the ad inventory as a supply chain. Each link in the chain has costs. A marketer with a dollar to spend on digital advertising will use multiple solutions to unify, enrich, and activate data on a potential customer on the way to that ad platform, and each step costs money that could be spent on more impressions. These technologies improve the quality of the campaign, but economic pressures drive marketers to get there as efficiently as possible—and drive vendors to improve the power of their own solutions to deliver value.
- **Business leaders are always looking to cut expenses.** Especially in chaotic economic times, the message is “do more with less” and quantify the results of every expenditure. That means that almost everything can be seen as trimmable fat, even when marketing has been charged as a growth driver. The need to better acquire, retain, and upsell customers while showing greater ROI and efficiency is exactly why a focus on a well-understood target audience is indispensable.



The adtech/martech convergence has moved from idea to actual implementation.

Each of these factors drive marketers to find actionable insights by creating a unified approach to a potential customer, from first contact through purchase and beyond. The goal is a clearer and more measurable picture of the buyer's journey, and an ability to focus not on siloed email or ad activity, but on the overall customer experience as a seamless journey that's persistent and consistent.

As publisher platforms and marketers have wrestled with these challenges, there's another factor, driven largely from the adtech side: Rising privacy concerns have created serious disruptions for both martech and adtech, though challenges around the third-party cookie have been a major headache for adtech in particular. Advertisers rely on third-party data, such as cookies, to target their ads. The slow death of third-party cookies, increasing regulation, and other privacy-driven upheavals have meant that a business's advertising strategy, like its marketing strategy, must rely more on first-party data—that which comes directly from the business's relationship and interactions with its customers.

Thus we have a thinner wall, if any, between modern advertising and marketing teams. Their more unified technology approach results in fewer silos; cleaner, more trustworthy data; better governance, compliance, and security; greater insight; more ability to take action on their data; and more bang for every ad dollar spent.

What makes the years-long trend important now, and necessary to call out in the 2023 Modern Marketing Data Stack, is that we're moving from the idea of convergence to actual implementation—and having the right tech foundation can accelerate that evolution. The larger worlds of adtech and martech are still far apart in significant ways, but for many of the customers we see in the Snowflake Data Cloud, the wall is beginning to come down.

Identity providers in particular want to bridge the adtech/martech gap, with vendors increasingly offering such classic martech practices as creating unified customer profiles, delivering personalized customer experience, and measuring the success of marketing campaigns to understand the full customer journey.

It's worth noting that many organizations within this category, such as LiveRamp, Neustar, and Experian, are building identity, enrichment, onboarding, activation, and other capabilities within Snowflake as Snowflake Native Apps (in preview as this report is published), enabling these processes to happen faster and with greater security. Essentially, this means there is no need to copy and move data between any of these solutions and the Data Cloud, adding agility and governance while reducing latency.

A broader example: Traditionally, adtech uses cookies and third-party data segments of cookies to profile audiences, while martech relies on lists of email addresses. As third-party cookies shuffle off this mortal coil, email lists increasingly power paid channels. That's an instance of the adtech/martech convergence playing out within the customer data platform (CDP).

2. AI/ML: THE EMERGENCE OF LLMS

The transformational impact of large language models and natural language interfaces will be felt throughout the marketing data stack, and throughout the marketing organization. In particular, LLMS and generative AI are expected to automate and improve a wide range of marketing functions and goals, including:

- **Ad campaign optimization:** Insights to improve audience segmentation and ad placement will emerge from large data sets that can include tables with rows and columns but also images that LLMS can parse, improving conversion rates and campaign ROI.
- **Content generation:** If you're looking for serviceable text, quick and cheap, generative AI tools will write your blog posts, ad copy, web pages, emails, and more. They can pretty much do all that already.
- **Natural language processing:** LLMS are built on advanced NLP techniques, meaning that marketing tools will better interpret and respond to human language. Chatbots that don't infuriate your customers and virtual assistants that don't frustrate you are just the beginning. NLP-powered sentiment analysis can also help marketers gauge public opinion and sentiment toward their brand or campaigns.

- **Market research and competitive analysis:** Throw it all into your LLM: tweets and online retailer reviews, market research reports, news, publicly available data sets. The algorithm can process all of it to give marketers deep insights into consumer trends and sentiment, the competitive landscape, and shifting market opportunities.
- **Customer personalization:** Similarly, LLMS can take everything you know about a customer, and similar customers, and tailor campaigns and interactions based on behavioral patterns and more. The outcome: more effective campaigns, happier customers, better campaign results.

The primary and most obvious effect on a marketer's day-to-day will be in terms of productivity. Advanced AI capabilities will meaningfully upgrade pretty much every technology in the stack and increase the amount of data that marketers can leverage, the quality of the insights and outputs, and the speed of pretty much *everything*. Whereas querying data today involves going to a data science team that can code the specific queries or provide the algorithmic model to analyze the data, marketers with no coding skills will be able to ask more questions in natural language, and get the outputs directly.

Where data scientists do need to code, the process of writing queries or shaping a data model will be much faster, in part because LLMS don't need nearly as much structure; with guidance, the model figures out the structure itself. That means that data science teams will also be faster and more productive.

But there's a subtler, and arguably more important, change that the rapid, widespread adoption of LLMS and AI generally will drive: We'll trust algorithmic outputs more. Right now, a lot of data outputs come to marketers in frankly mysterious ways. The process of working with data is complex, difficult, and abstruse. We see the outputs, but we understand that the process of obtaining them doesn't necessarily feel ... organic. Algorithms are inexplicable, remote. When we can simply ask our data tool to explain something to us, and the answer comes to us in natural, conversational language, we'll trust the output more because it will feel more human.

Depending on how generative AI models develop, this heightened tendency to trust could be either helpful or problematic. But without a doubt, this trust will further accelerate the adoption of AI and change the way we work. Nontechnical and less-technical knowledge workers will find working directly with data as natural as we now find using search engines, email, and instant messengers throughout the workday. And the accuracy of recommendation engines, churn predictions, and marketing attribution tools will dramatically increase, delivering the speed of automation while increasing the effectiveness of human decision-makers.

3. PRIVACY: NAVIGATING THE CHALLENGES

The evolution of the modern marketing data stack is being driven by the sheer volume and variety of data out there. It's possible for marketers to understand their customers much more deeply than ever before, and to act more quickly and precisely on those insights. But the aggregation of so much data, as well as the need to collaborate on that data with various partners, raises privacy concerns. As does the fact that the ecommerce era means that a business has a direct relationship with a customer's data. A retailer, for instance, no longer buys ads from a TV station or newspaper promising their audience, on average, fits a certain age, gender, and/or income level. Now the retailer is using data that is, in part, provided directly by the consumer through past purchases and loyalty programs, among other sources. That retailer serves its message directly to the consumer through email or by placing ads on the sites that their target consumer visits. How the retailer uses that data, and which partners it shares the data with, can complicate the relationship between company and customer.

Yet if efficient and insightful data technologies have created this privacy challenge, they can also help solve it. Bringing all one's data together to create a unified picture of a target customer can improve management of privacy responsibilities. Consumers both provide data and make consent decisions through a variety of channels. They check yes or no on an offer to receive marketing emails. They sign up for a loyalty program


that trades data for discounts. They accept or reject the cookies that provide a more personalized online experience. All of these decisions and permissions live within various marketing technologies. Bring that data together and it's easier to meet obligations to the customer and the relevant regulatory regimes. Increasingly on Snowflake, we're seeing our users do exactly that, unifying this data to create not only a holistic view of the customer and a clear view of that customer's privacy preferences, but also to earn trust and simplify the ability to act on consumer data subject requests.

A unified data structure, with privacy and consent features built in, will also be essential to properly inform LLM training, allowing the removal of data for which consent has not been obtained. This structure also improves the consent-preserving data collaboration within the adtech ecosystem, as we are seeing with market frameworks that let advertisers, ad agencies, and publishers track consumer consent for web page visits.

Speaking of privacy-preserving data collaboration within adtech, we've seen increasing adoption of data clean rooms as a way to share customer data without exposing sensitive details. As brands seek increased collaboration to counteract the deprecation of cookies, data clean rooms allow collaboration and privacy compliance to coexist.



Efficient and insightful data technologies helped create a privacy challenge. They can also help solve it.



Marketers shouldn't be hampered by data friction. They should be working on what they love to do: delivering great, effective campaigns.

4. UNIFIED DATA: SINGLE SOURCE OF TRUTH—AND VALUE

We've covered three macro forces shaping the marketing landscape: economic pressures to show ROI, the epochal arrival of LLMs in the AI space, and the convergence of adtech and martech. There's a fourth force at play, even closer to the technology stack itself: The need to build a technology infrastructure that by its nature prevents silos and maintains a unified approach to data. That's been a pain point for years, but one that most organizations have yet to resolve.

Looking ahead to our first category, we'll consider the technology stack, analytics, and data capture, pausing to consider technologies such as Heap, Snowplow, Piano, Mixpanel, and Amplitude, all listed as leaders or up-and-comers. An essential difference between the technologies that lead the modern marketing data stack and the ones that aren't on the list is that these solutions build directly on your data layer, operate directly from it, or leverage modern data sharing to work directly from your enterprise data platform with no friction. You don't have to pull the data outside, creating a new copy to manage, so that your tool can get to work on processing the data. These tech makers (and many others we'll meet in the following pages) are driven by that fourth force: the need for agility that brings the applications closer to the single, unified data store, equipped with native processing capabilities.

That sounds like an in-the-weeds discussion of infrastructure, but it's more. By working with tools that are closer to the data, you're optimizing the expensive time of your data engineers. You're cutting the time and expense of getting your campaigns right. And with that, you're able to be proactive, rather than reactive, in your marketing, and that's the key to winning in an ever-faster, ever-more-competitive landscape. Marketers shouldn't be hampered by data friction. Instead they should be working on what they love to do: delivering differentiated campaigns with optimal speed, accuracy, and agility.

With all that in mind, let's look at leading solutions that some of the most sophisticated, data-driven marketing organizations are adopting to modernize their marketing stacks.

THE MARKETING TOOLS



**ANALYTICS &
DATA CAPTURE**



ENRICHMENT



**IDENTITY &
ONBOARDERS**



**CUSTOMER
DATA ACTIVATION**



**ADVERTISING
PLATFORMS**



**MEASUREMENT &
ATTRIBUTION**

IDENTITY & ACTIVATION



ANALYTICS & DATA CAPTURE

Analytics solutions capture event data from multiple sources and provide insight into activities and trends. Solutions in this category encompass a wide variety of analytics tools across behavioral, product, mobile, web, and various other landscapes. Then they work their magic to provide insights into consumer behaviors that help businesses focus their resources and optimize their return on their marketing and advertising investments.

While every category of the modern marketing data stack is in flux, the analytics realm is particularly volatile. This summer, Google stopped processing data on standard Universal Analytics properties, a very popular tool for marketers, in favor of its next-gen Google Analytics 4. The change has created a challenge for many of its users, but an opportunity for makers of similar tools. So marketers will not only be assessing GA4, but other Google alternatives such as Snowplow, Piano, RudderStack, Amplitude, Heap, Mixpanel, and others.

Particularly as martech and adtech come together, marketers will be looking for analytics and data capture solutions that work across both categories, and that can understand how individual audience members interact with both marketing content and paid ads. The Snowflake Data Cloud allows organizations to bring all this data together easily, with proper security and governance, which means that our customers may be particularly interested in solutions that take analytics further.

LEADERS

Amplitude is a low code/no code digital analytics platform leveraging user-based behavioral reports so non-technical team members can act on data.

Data.ai is an AI-powered mobile market data and analytics provider, which offers competitive insights and intelligence to help businesses make data-driven decisions that accelerate and optimize their mobile strategies and maximize the success of their apps worldwide.

Funnel helps marketers connect and normalize all of their marketing data with automated data cleaning and organizing, ensuring that marketing data is automatically refreshed and ready to use.

Heap provides low-code analytics software to track customers' entire digital journeys, aggregating and integrating quantitative and qualitative data so marketers can uncover points of friction.

Mixpanel provides fast self-serve analytics, allowing organizations to join Mixpanel data with existing data environments to understand user behavior and key metrics like conversion and retention.

Piano unifies customer data and behavior metrics to influence personalized customer journeys, and offers activation that helps brands launch campaigns and products faster, strengthen customer engagement, and drive personalization at scale.

RudderStack is built to help data teams deliver value across the entire data activation lifecycle, from collection to unification and activation, making it easy to collect and send customer data to the tools and teams that need it.

ONES TO WATCH

Snowplow's Behavioral Data Platform allows marketing and data teams to create and operationalize rich, first-party customer behavioral data to fuel advanced data-driven use cases—directly from the Snowflake Data Cloud in near real time.



ENRICHMENT

Once a business has unified customer/user data into a single store, it may enrich profiles with third-party data to paint a more precise and holistic picture. With the ongoing deprecation of cookies, brands are increasingly implementing robust first-party data strategies. Data enrichment is the process of improving those first-party data sets through third-party sources, resulting in higher addressability or additional demographic attributes to better understand each customer more precisely. Enrichment providers can add such high-value attributes as demographics, behavioral patterns, or interests. They aggregate third-party data sources, social media data, behavioral tracking data, and other external data sources. The process gives marketers a deeper understanding of their target audience and helps them provide a better experience, with more relevant timing and content of campaigns, which can improve engagement, conversion rates, customer satisfaction, and brand loyalty.

LEADERS

Crisp offers an ELT pipeline that ingests a live feed of data from the top 80% of U.S. retailers and distributors for real-time data enrichment.

Equifax provides differentiated insights that give financial and consumer brands a deeper understanding of market dynamics, household economics, consumer behaviors, and business firmographics.

Fetch provides brands with a way to engage customers, drive loyalty, and enrich first-person data based on consumer purchasing behavior, trends, and preferences ascertained through their rewards program for shoppers.

G2 allows customers to enrich existing records with real user reviews, buyer intent signals, and access to competitive insights.

GlobalData provides an end-to-end marketing and sales intelligence solution for B2B companies, enabling them to prospect, target, and enrich leads using both first-party data and proprietary account intelligence.

Numerator is a data and tech company that delivers first-party, single-sourced consumer purchase and behavioral data from 1M+ U.S. households for total consumer understanding.

SafeGraph is focused on building the most accurate global places data set available, empowering modern builders to create world-class location-based applications and analytics tools.

Similarweb is a digital market intelligence company providing data and insights about website traffic, engagement metrics, referral sources, and audience demographics.

TRUESTAR is a consulting company that helps clients analyze and visualize data. TRUESTAR uses a variety of data and solutions to help clients solve problems and accelerate data-driven decision-making.

ZoomInfo helps companies find, acquire, and grow customers faster by enriching CRM lead and contact data with first-party and third-party B2B data on existing records.

ONES TO WATCH

Bond serves clients globally with customer experience and loyalty solutions, helping brands, customers, employees, partners, and the communities they serve to experience the benefits of growth.

Affinity Solutions transforms data from more than 140 million debit and credit cards into actionable insights about consumer spending for marketers, agencies, consultancies, and financial services companies.

IDENTITY AND ACTIVATION

This year, we've grouped three closely related categories under the umbrella of Identity and Activation: Identity & Onboarders, Customer Data Activation, and Advertising Platforms. These three categories are closely related, each enabling marketers to activate first-party data to run effective campaigns. We'll consider each category separately, though, in the pages that follow.

Another change in this category is worth calling out in particular: The innovation in the martech space has led us to reposition the activation category this year. Where once activation was primarily managed through a complete customer data platform, more vendors are offering specialized activation tools, and we're seeing Snowflake users adopt these technologies instead of or alongside their traditional CDP.

The activation space is particularly interesting with Snowflake. Traditionally, the most popular identity solutions would take data in a separate application and help fill in the picture around specific individuals or entities; then the data would have to be sent out to a different solution to activate a campaign for that audience. In the Data Cloud, some identity providers are standing up the activation component, meaning that Snowflake is not only witnessing this evolution, but helping foster it.

Identity and activation have merged as a single umbrella category because we're seeing more vendors offer—and more Snowflake users adopt—added activation functionality from the identity providers, as well as more identity functionality from CDPs and other activation providers. Furthermore, we see packaged CDPs, or platforms with end-to-end functionality, including Twilio Segment, Simon Data, and Zeta Global, continue to offer some form of identity resolution for first-party data. This combination of factors, when taken together, supports merging

these formerly distinct categories together.

Providers that have traditionally offered identity resolution are innovating in this space. Organizations require an effective process to attribute customer behavior and interactions across all touchpoints to a single, unified customer profile. And as noted last year, many organizations within this category are building identity, enrichment, onboarding, activation, and other capabilities within Snowflake, enabling these processes to happen faster and with greater security. LiveRamp, for example, has built product capabilities that let marketers improve performance and privacy by activating and measuring natively in Snowflake, while others, such as Neustar and Experian, are working toward similar capabilities as well.



IDENTITY & ONBOARDERS

Identity solution providers help their customers connect data points to individuals, such as resolving a device ID and multiple email addresses into a single identity, or recognizing that multiple personas are part of the same household. The result is a unified, persistent identity for each customer or audience member, allowing advertisers to efficiently reach their desired audience across multiple devices and accounts.

Onboarding is the process of transferring that identity data to a third-party advertising platform, "activating" the data to determine who sees an ad campaign, and which campaign should be most effective. This improves campaign personalization and measurement by connecting an advertiser's message to that unified, persistent identity.

There's a lot of overlap between the two disciplines, with many vendors providing aspects of each, or complete packages of the two. When we see these services used on Snowflake, we're finding that vendors are able to deliver greater speed and compliance, accelerating and focusing their campaigns. As more marketers bring their customer data into Snowflake, the overlap or convergence of identity and onboarding in the Snowflake Data Cloud should continue to drive efficiencies.

LEADERS

Acxiom is a customer intelligence company that helps brands manage data in a secure and governed way to better understand people, driving better customer experiences and greater ROI for business.

Experian, a data analytics and consumer intelligence company, lets brands deliver personalized messaging, build complete customer profiles, gain data-driven insights into marketing performance, and activate across channels and devices.

FullContact is a privacy-safe identity resolution company helping businesses create tailored customer experiences and improve identity verification by unifying data and applying insights in near real time.

LiveRamp uses a native application in Snowflake to help businesses to onboard, identify, connect, unify, control, and activate data across different channels and devices to optimize marketing efforts.

MediaWallah helps customers build tailored identity infrastructure to power data-informed omnichannel activation, measurement, and governance for a 360-degree view of the customer.

Merkle's Merkury is a customer experience management platform that identifies anonymous customers as a cookieless ID, enhances the ID with person-based data, and connects those IDs to platforms for targeting and analysis.

Neustar (TransUnion) is an identity resolution provider that maintains accurate and enriched information about consumers with continuous, real-time data updates.

Verisk Marketing Solutions (VMS), formerly Infutor, is an identity resolution solution that helps brands uncover what they need to know about consumers so they can make data-informed marketing and risk decisions.

ONES TO WATCH

Aidentified uncovers the best opportunity to engage prospects using predictive analytics and AI-based relationship intelligence mapping based on 210 million U.S. consumer profiles and 80 million professional profiles.

UID 2.0 is an open source, privacy-first identity solution built to provide a secure and accurate identity standard for the digital advertising ecosystem.



CUSTOMER DATA ACTIVATION

Data activation solutions, such as customer data platforms, customer engagement platforms, reverse ETL providers, and others, are designed to make the activation process faster and easier. Activating your data means doing something with it to derive valuable outcomes. In the case of the marketing data stack, that means taking your identified and enriched audience data, creating relevant segments and audiences, and ultimately bringing it to paid channels and the owned-media platforms in particular (website, email, in-app, etc.) that help you reach those individuals with your messages. It's worth noting that these platforms that deliver messages to owned channels—including Braze, MessageGears, Simon Data, Iterable, and Zeta—also have the ability to connect directly to the Data Cloud for activation.

LEADERS

Acquia is a cloud-based enterprise marketing platform for building, managing, and optimizing websites and delivering superior customer experiences.

Amperity is an intelligent CDP allowing businesses to connect customer data from multiple sources so marketers, IT, and analytics teams have a holistic view of a given user.

Braze is a comprehensive customer engagement platform that allows brands to ingest and process customer data in real time to orchestrate and optimize contextually relevant, cross-channel marketing campaigns.

Census is a data activation platform built on Snowflake, transforming the Data Cloud into a hub for marketing activation and empowering non-technical business users to take data-driven action.

Hightouch is a data activation platform powered by reverse ETL so teams can sync customer data from the Snowflake Data Cloud into the tools your business teams use, including CRMs, email tools, and ad networks.

HubSpot is an AI-powered customer platform that drives connection across the buyer journey for marketing, sales, and service teams.

Iterable is the AI-powered, cross-channel communication platform helping to orchestrate individualized, harmonized, and dynamic customer experiences by closing the activation gap.

Simon Data is a customer data platform that powers faster, more precise segmentation and personalization by unifying customer data from the Snowflake Data Cloud with additional sources, bringing the work to the data.

Twilio Segment helps simplify data collection from multiple touchpoints into one location, powering businesses to scale personalized, intelligent customer engagement with unified customer data.

Zeta unifies identity, intelligence, and activation to deliver better experiences for consumers and better results for brands.

ONES TO WATCH

ActionIQ is a customer experience hub built on a composable customer data platform that helps enterprise marketers to activate data across customer experiences by providing audience segmentation at scale, customer journeys, and data streaming personalization.

GrowthLoop, formerly Flywheel, empowers non-technical business teams to activate intelligent customer segments directly to marketing, sales, and customer service destinations.

MessageGears is a cloud-native customer engagement platform that connects directly to the Data Cloud, letting users build flexible, personalized, real-time interactions across every channel for profitable and loyal customer relationships.



ADVERTISING PLATFORMS

The potential (and immediate results) of programmatic advertising have brought more vendors and more innovation to the advertising value chain. As a result, the ecosystem is quite complex, with different types of platforms, each with its own purpose. This category includes demand-side platforms (DSP), supply-side platforms (SSP), ad exchanges and ad servers, as well as other innovative advertising platforms. An SSP helps publishers monetize their advertising inventory by making it available to ad exchanges, while a DSP is the SSP's counterpart on the advertiser side, empowering brands to set up and execute campaign goals. An ad exchange is what connects SSPs and DSPs with each other to automate and enable the buying and selling process. Ad servers are the engines that allow advertisers and publishers to optimize, manage, and distribute ads across paid channels.

LEADERS

Beeswax, part of FreeWheel's portfolio, is a TV-optimized media activation platform enabling agencies to deploy their proprietary data targeting models, bidding tactics, and measurement standards to gain control over the buying process.

FreeWheel, a Comcast company, provides comprehensive ad platforms for publishers, advertisers, and media buyers, making it easier for buyers and sellers to transact across all screens, data types, and sales channels.

Magnite, an independent sell-side advertising company, helps publishers monetize their content across all screens and formats including CTV, online video, display, and audio.

OpenX is a supply-side platform that connects publishers and advertisers, powering better business outcomes across all environments including CTV, mobile, and web.

StackAdapt is a self-serve, multi-channel programmatic advertising platform offering AI-driven targeting and robust measurement solutions.

The Trade Desk is a media buying platform for advertisers and agencies to leverage data to buy media across the open internet.

Yieldmo is an advertising platform that helps brands improve digital ad experiences through creative tech and AI, using bespoke ad formats, proprietary attention signals, predictive format selection, and privacy-safe inventory curation.

ONES TO WATCH

OpenAP makes it possible for unified ID-based audiences to be used for targeting and measurement across TV publishers in both linear and digital viewing environments, unlocking transformative, cross-platform campaign insights.

The **Sharethrough** ad platform maximizes user attention and performance through research-backed ad enhancements while curating the inventory for optimized directness, sustainability, and quality.



MEASUREMENT & ATTRIBUTION

Every marketer wants to maximize ROI. Faster-moving, more accurate campaigns minimize waste by engaging audiences at the right place and time. Measurement and attribution technologies provide a comprehensive understanding of investments across all channels, using high-quality data to assess the impact of a full campaign or one specific action.

Marketers define their KPIs and metrics in their measurement tools, which then apply analytical techniques to assess performance and outcomes. Attribution entails assigning credit and determining how various touchpoints and behaviors contributed to a particular result. Measurement and attribution provide critical insights that empower businesses to optimize strategies, allocate resources effectively, and make informed, data-driven decisions for achieving success and driving growth.

Because many aspects of media planning and optimization still rely on manual processes that create inefficiencies and suboptimal investment decisions, measurement has become a critical capability. Modern marketers can algorithmically create, monitor, and optimize media plans, then run attribution models on the executed campaign. The resulting recommendations allow marketers to further maximize outcomes within budget and constraints.

LEADERS

Comscore is a cross-platform measurement currency for content, advertising, planning, and optimization.

DoubleVerify offers digital media measurement and verification activation services so that advertisers can ensure the quality, safety, and performance of their digital advertising campaigns.

IQVIA commercial solutions help healthcare and life sciences organizations responsibly and efficiently leverage sensitive data assets to create precise and actionable insights.

NCSolutions provides targeting, optimization, and campaign measurement solutions outcomes by linking what consumers watch, see, or hear with the CPG products they buy.

Nielsen is an audience measurement, data, and analytics platform that measures audience behavior across all channels and platforms, empowering clients with trusted intelligence that fuels action.

Rockerbox helps marketers optimize their spend by identifying underperforming channels across the customer journey, featuring rule-based attribution, multi-touch attribution, halo analysis, geo lift, in-channel testing, incrementality, and media mix modeling.

VideoAmp is an advertising measurement and optimization platform that unifies audiences across the disparate systems of traditional TV, streaming video, and digital media.

ONES TO WATCH

AdImpact tracks ads across TV, digital platforms, print media, radio, and out-of-home advertising so users can search, view, and analyze specific ad creatives, campaigns, and effectiveness.

EDO is a data analytics and measurement company tracking the impact of advertising across linear TV and streaming.

THE FOUNDATIONAL TOOLS



**INTEGRATION &
MODELING**



**BUSINESS
INTELLIGENCE**



**AI & MACHINE
LEARNING**



**PRIVACY-ENHANCING
TECHNOLOGIES**



INTEGRATION & MODELING

These technologies and tools cleanse and model raw customer, marketing, and advertising data so it can be ingested and organized into a single repository before it is integrated, analyzed, and shared. This category also includes technology providers that offer data transformation—the process of changing the format, structure, or values of data to make it more organized and useful to humans and computers.

LEADERS

dbt is a data transformation framework that uses software engineering best practices such as testing and version control to reduce code, automate dependency management, and ship more reliable data—all with SQL or Python.

Fivetran is an automated data movement platform moving data out of, into, and across cloud data platforms so that data teams can focus on delivering analytics, rather than building and maintaining pipelines.

Informatica is a data integration and management platform built to connect, transform, route, and process an organization's data of any type, pattern, model, complexity, or workload.

Matillion provides modern data integration using a low-code/no-code interface to accelerate data loading and data transformation for advanced analytics, ensuring timely data consumption at scale.

Talend combines data integration, data quality, and data governance in a single low-code platform that works with virtually any data source to improve the reliability of your data.

ONES TO WATCH

Adverity is an integrated data platform for connecting, managing, and using your data at scale, automating complex data integration and governance processes, and generating valuable insights.

Airbyte is an open source data integration platform that simplifies the process of collecting, integrating, and moving data from various sources.

Rivery is a cloud-based platform that provides a unified solution for ELT pipelines, workflow orchestration, and data operations.



BUSINESS INTELLIGENCE

BI tools analyze data and provide visualizations, reports, and dashboards to make that analysis available throughout the organization, from senior management on down. The insights delivered by BI technologies help improve decision-making. Companies can better understand audience behavior and sentiment, developing trends, and the effectiveness of marketing efforts across all channels.

LEADERS

Microsoft PowerBI is a unified, scalable platform for self-service and enterprise BI that's easy to use and helps users gain deeper data insight.

Mode is a BI tool powering ad hoc data analysis and self-serve reporting. It offers a centralized environment for data scientists, analysts, and business users to work together to derive data-driven insights.

Sigma is a cloud-native analytics platform using a spreadsheet interface to empower business users to collaborate and make data-driven decisions through self-service BI.

Tableau is a BI platform enabling data exploration for professionals—from business users to data scientists—to reveal insights with accessible machine learning, statistics, natural language, and smart data prep.

ThoughtSpot makes data insights actionable through an interactive and intuitive platform, delivering analytics and BI capabilities to users of any technical skill level.

ONES TO WATCH

Domo is a low-code BI and analytics data application platform allowing organizations to connect, prepare, visualize, and analyze data from various sources in real time.

Microstrategy is a BI platform empowering anyone within an organization to explore data, perform ad hoc analysis, create interactive visualizations, and share insights with others in the organization.



AI & MACHINE LEARNING

To say that artificial intelligence is a red-hot category is to vastly undersell it. We noted earlier the incredible potential of LLMs to transform everything marketers do. The power for data scientists more broadly is also enormous. With AI, data scientists are ever better at building algorithms to analyze vast quantities of data well beyond human capacity, surfacing insights that drive more personalized consumer experiences and more targeted and effective marketing tactics. This category covers AI and ML tools or platforms that help marketers surface unseen trends and implement predictive analytics to understand not only what has happened, but to forecast what's likely to happen next.

A key trend in this category: Most of our leaders provide platforms with the flexibility to build your own custom models. Many of the up-and-comers on our watchlist have more industry specialization. Driven by the maturity of data science in marketing, there's an appetite for greater specialization, a trend we expect to accelerate.

LEADERS

Alteryx delivers easy end-to-end automation of data engineering, analytics, reporting, ML, and data science processes, letting enterprises everywhere democratize data analytics across their organizations for a broad range of use cases.

Amazon SageMaker is a fully managed AWS service that helps businesses build, train, and deploy machine learning (ML) models using data from a wide variety of sources.

Dataiku offers processing flexibility with its ML model management capabilities, and cloud-optimized, enterprise-ready AI solutions, which lets technical and non-technical users build, deploy, and monitor data science projects.

DataRobot delivers value-driven AI, a unique and collaborative approach to AI that combines an open platform, deep expertise, and broad use case experience to improve how organizations run, grow, and optimize their business.

Hex's platform for collaborative analytics and data science combines multi-player notebooks supporting SQL, Python, R, and no-code with data apps and knowledge management, helping teams to do more with data together.

SAS is a cloud-native AI, analytics, and data management platform used to drive innovation and insights, and transform data into intelligence.

ONES TO WATCH

Peak's cloud AI platform lets technical and commercial teams build, deploy, and manage AI applications at scale across their entire business.

RelationalAI, a cloud-native AI coprocessor, provides integrated support for graph analytics, reasoning, optimization, and other composite AI workloads.



PRIVACY- ENHANCING TECHNOLOGIES

Privacy has become an increasing concern in terms of government regulation and consumer expectation. To meet the moment, tech makers are creating solutions that ensure that personal and proprietary information stays that way, while enabling effective marketing activities. These solutions help customers manage regulatory compliance, data quality, security, and consent and preference status. They also provide clean rooms for secure and compliant data analysis. Examples of solutions that enable this are security and risk platforms that optimize and streamline the process for executing data subject requests, as well as data clean room applications that provide a secure environment for multiple companies to bring data together for joint analysis under defined guidelines and restrictions. In the data clean room, personally identifiable information (PII) is anonymized, processed, and stored in a compliant way.

LEADERS

Habu, a data clean room provider, enforces the highest security and privacy standards while enabling collaborative intelligence without data movement.

OneTrust is a risk management platform designed to help teams manage privacy, risk, data governance, and compliance.

Samootha democratizes access to secure data collaboration across clouds, with an intuitive UI that allows nontechnical users to use clean rooms to leverage their data ecosystem with data-backed inference.

ONES TO WATCH

Lockr provides a set of tools that let publishers verify and match consumer email addresses for targeted advertising while protecting users' privacy and incorporating consumer consent.

Optable's data collaboration and data clean room platform helps businesses leverage customer data in a privacy-conscious manner to improve targeting and campaign effectiveness.

THE SNOWFLAKE DATA CLOUD: THE FOUNDATION OF THE MODERN MARKETING DATA STACK

We have identified the key players in the modern marketing data stack by looking at actual customer data within the Snowflake Data Cloud. We see which technologies have real traction among real marketers driving real campaigns. Underlying all this activity, and all these technologies, is the Data Cloud itself.

With all of their data in one place, marketers have a 360-degree view of the customer or prospect that can inform more effective decisions, and can unify it with the full breadth of their enterprise data. Marketers can also enrich their first-party data, without movement and copies of data, through [Snowflake Marketplace](#), which contains more than 2,100 diverse data products and applications from hundreds of providers. Overcoming the need to copy and move data not only reduces latency to improve customer engagement, it also streamlines and improves governance and security. The Data Cloud also allows secure, privacy-centric data collaboration, including the ability for marketers and advertisers to collaborate with data clean rooms. Snowflake's robust data sharing capabilities, combined with a best-in-breed partner ecosystem, ensures that marketers can build a scalable, performant, and efficient stack capable of delivering the differentiated campaigns that marketers and advertisers seek.

Fundamentally, the Data Cloud allows organizations to model and transform their data right where it is stored. Snowpark, which gives users the ability to build robust AI and advanced analytics models using our secure processing of Python code (and other languages) right where their data resides, is a significant step change that ensures the highest standards of privacy and security while letting marketers eliminate data copies and silos. As a foundational principle, Snowflake empowers organizations to move their work to the data, not their data to the work—a revolutionary approach to realizing the potential of the modern marketing data stack.

Marketers see significant benefits in the Data Cloud, including a data-driven view of the customer journey and deeper insights into cross-channel campaign performance from structured, semi-structured, and unstructured data sets. Snowflake helps marketers achieve three absolute musts of modern marketing:

- **Deliver high-speed, holistic insights.** Using the Data Cloud, marketers can easily integrate the full breadth of customer data—structured and semistructured, internal and external sources—to inform meaningful marketing analytics in near real time.
- **Know—and serve—your customer.** Marketers can access, unify, and activate first-, second-, and third-party data to power AI/ML models for segmentation, recommendation engines, and more, to better understand each customer and improve every engagement.
- **Increase marketing/advertising ROI.** A holistic view of data lets marketers know, in real time, which engagements drive the most impact, to take action across multiple channels to reach customers with the message and offer that the moment demands.

An end-to-end view of your real-time data yields better insights with which to drive smarter, timelier decisions. “No more silos” has been an aspiration for years, and marketers on Snowflake are making it happen. Build your modern marketing data stack on a solid foundation.

INDUSTRIES BRING NUANCE TO THEIR STACKS

While this report takes a sweeping look at the general technology and trends around the modern marketing data stack, it's worth discussing some of the trends specific to certain industries. Within the Snowflake Data Cloud, we can see how marketing organizations in a given industry tend to adopt foundational and marketing-specific technologies. In this section, we combine insights from our customers with adoption data to examine how market imperatives shape the modern marketing data stack across five industries.



FINANCIAL SERVICES

The rapid pace of technological advancement in the financial services sector has not only revolutionized how customers interact with their financial institutions and improved operational efficiency, it has also caused a significant transformation in the strategic role of marketing. Customers have access to more information, more choices, and more channels with which to interact with financial firms. As a result, marketing expectations have shifted. CMOs in financial services are no longer just crafting brand messaging; many now bear the responsibility of executing the broader growth strategy and overseeing the entire customer experience.

Looking at high-level trends, two stand out:

- **The “Great Wealth Transfer” will drive increased demand for tailored, personalized customer experiences.** Over the next two decades, parents and grandparents are expected to pass down trillions of dollars to younger, more digitally savvy generations. This will raise the competitive environment as financial institutions fight for beneficiaries' business. Because younger consumers expect seamless, digital, and personalized experiences, robust, data-driven personalization strategies will be essential.
- **Leading banks are leveraging advanced analytics, ML, and AI to implement sophisticated, next-best-action models to boost sales.** Through data, marketers can identify up-sell and cross-sell opportunities, and route the right message to the right customer, at the right time. Again, the competitive pressures are enormous.

In terms of their marketing data stacks, the financial services sector is notable for having considerably above-average amounts of ongoing data sharing, indicating the value of their data efforts and the more advanced maturity of the sector's approach to data. That data maturity is also demonstrated by financial firms' heavier-than-average adoption of solutions in the AI & Machine Learning category. Higher adoption of AI for marketing use cases in financial services may be in part due to the heavy dependence on AI for core financial services needs such as fraud detection and risk management. The customer data activation category has serious penetration in financial services, which has more adopters in the financial services industry than any other vertical. In fact, there are 28% more financial customers for the tools in that category than from the second-highest industry. We also find that more finance customers prefer the packaged CDP approach over the composable model, in which a business assembles a collection of solutions to work from a single "source of truth" data repository.



HEALTHCARE & LIFE SCIENCES

Providers, payers, and life sciences companies are inundated with data from varied sources, in different formats, with an overarching PII data security challenge. At the same time, patients expect these organizations to leverage this data to provide seamless care through each step of their journey. That's the leading element of two key trends we're seeing in the healthcare space:

- **The connection between personalized care and improved patient outcomes.** More and more, consumers demand seamless experiences from the brands they interact with, and this includes healthcare providers. To improve in-person and digital patient experiences, HCLS organizations increasingly focus on unified patient views, bringing together electronic health records, clinical trial data, and more. This unified view helps optimize care, improve patient engagement, and reduce costs, as well as letting marketers drive targeted campaigns segmented by patient population.
- **The rise of predictive analytics powered by AI and ML.** AI and ML algorithms can predict patient and customer behavior and outcomes by analyzing historical data. HCLS companies can use predictive analytics to identify high-risk patients, anticipate disease progression, and target interventions accordingly. This helps care providers design proactive strategies, such as preventive care campaigns, early detection initiatives, and patient engagement programs that ultimately serve customer health and loyalty.

The momentum among HCLS marketing organizations has been to more broadly adopt the tools and technologies highlighted in the Customer Data Activation category, with a balance between packaged CDPs and a composable, best-of-breed approach to activation. Also, we see very strong adoption of the tools highlighted in the Integration & Modeling and Business Intelligence categories, demonstrating advanced data maturity and a focus on the foundational step of building a unified and holistic view of all patient data.

MEDIA & ENTERTAINMENT

The streaming video revolution that began 15 years ago continues to transform the media and entertainment industry. With the rise of streaming platforms, media companies own the distribution channels and the direct consumer relationship—and therefore can use their consumer data for many purposes, including marketing. Three broad trends affecting the entertainment field are:

- **Experimentation with pricing models.** Streamers are trying tiered models, including ad-supported, low-cost/free tiers alongside premium, ad-free models. They're offering discounts for longer contracts. They're using customer data to target these offers to bring in new customers and reduce churn.
- **The proliferation of data clean rooms.** With increasing concerns about data privacy and regulations, data clean rooms provide a controlled and privacy-preserving space for two or more parties to bring together their data for joint analysis without exposing their sensitive or proprietary data to each other. While preserving privacy, marketers gain a more comprehensive understanding of their audiences to more precisely target their campaigns.

- **Enhanced use of AI and ML for audience segmentation and campaign optimization.** By quickly drawing more granular insights from enormous data sets, marketers can better understand audiences and their needs, tailoring campaigns accordingly. Using AI-powered predictive modeling, marketers can accurately forecast campaign outcomes and estimate customer lifetime value—essential to the health of a subscription-based service. AI also can better assess user interaction with a campaign, delivering deeper strategic intelligence.

Looking at how media and entertainment companies build their marketing stacks, we note that more and more providers are equipped to deliver first-party data activation in the Identity and Onboarding and Advertising Platforms categories, covering both supply-side and demand-side platforms. And, as mentioned, data clean rooms are increasingly a big deal. On Snowflake, we've seen the number of data clean room relationships increase up to 7x from April 4, 2022, to April 3, 2023.



RETAIL & CONSUMER GOODS

A number of trends are making life hard for retail marketers today. Privacy is a big issue in the consumer space, at the same time that retailers need greater personalization to reach customers regardless of platform, and despite intense competition for attention. These are among the factors driving three key trends:

- **The continuous rise of omnichannel marketing.**

Consumers interact with brands across an increasing range of channels: websites, email, social media, and physical stores. Marketers continue to focus on refining a unified view of their customers. In this fragmented data landscape, marketing teams need a view of their customers across all channels to comprehend an increasingly complex customer journey.

- **The growing importance of personalization in retail.**

Consumers expect personalized experiences and recommendations based on past interactions and preferences, requiring marketers to analyze large amounts of customer data in real time. They're applying advanced AI models to their data to deliver automated and personalized experiences at scale.

- **The emergence of retail media as a significant trend.** With retail media, brands can display targeted ads, offer product recommendations, and provide relevant content directly to consumers at the point of purchase. No longer forced to rely heavily on third-party advertising platforms, consumer brands can engage with customers using their own digital direct-to-consumer platforms. Brands thus strengthen their relationships with customers and gain valuable data on consumer behaviors and preferences, with which to optimize marketing campaigns, boost sales, and build long-term customer loyalty.

In terms of how the marketing technology stacks up for retailers, our data reveals that the retail and consumer goods industry has the highest concentration of packaged customer data platforms (CDPs), pointing to the industry's long-standing need for deep, personalized experiences across channels. Retailers are also highly focused on sharing data to the activation layer, to reduce latency and deliver differentiated experiences. On the downside, adoption of AI/ML platforms highlighted in the report is lower in retail and consumer goods than in other industries, indicating a clear opportunity for automation and predictive analytics.

TELECOMMUNICATIONS

Unlocking new revenue streams and rapidly adapting to meet customer demand has never been more critical for the telecom industry. Across this broad sector—mobile services, broadband, enterprise solutions, and more—margins are shrinking, competition is fierce, and customers expect personalization. Marketers are shifting to a cohesive data strategy to unify, analyze, and activate data, and they require a robust technology stack to execute it.

Three of the most significant trends broadly affecting the industry are:

- **The rush to monetize data.** Telecom providers possess a wealth of data ranging from customer profiles and call records to device usage metrics. With a data-driven approach, providers can enrich, analyze, and activate their data, letting marketing teams make data-driven decisions to achieve better business outcomes.
- **The drive toward greater personalization.** To deliver the personalized experiences and recommendations that consumers expect, telecom marketers are further developing the ability to analyze large amounts of customer data in real time, applying advanced ML to deliver automated and personalized experiences at scale.

- **The use of AI to gain precise data about device adoption trends and customer behavior patterns.**

AI provides an efficient and precise way to analyze the data of hundreds of millions of personal and business devices to unearth valuable insights. Telecom providers are using these AI-driven analyses to create new opportunities for their product, marketing, and customer care specialists.

Looking specifically at how telecom providers set up their marketing data stack, we see significantly higher adoption of tools in the foundational categories than in the marketing/advertising-specific categories. In fact, the customer ratio is 10-to-1 in favor of foundational tech. That tells us that the industry is focused on breaking down data silos and unifying all customer and marketing data in a single customer 360 view.

Telecom is also an industry with high relative adoption of AI and ML tools, albeit still with significant opportunity for growth. The use of AI in core operations for telecom providers, namely around network monitoring, has likely contributed to a lower barrier of entry for AI in the marketing function.





PERSONALIZE YOUR MODERN MARKETING DATA STACK

Every industry has its own challenges and opportunities, but even within a given industry, every business has its own niche, ambitions, and expertise. The vision of the modern marketing data stack outlined in this report represents an aggregate of the trends we're seeing within the Data Cloud. While the stacks are quite similar across industries, as we've just seen, there are meaningful nuances that shape the priorities and approach within every industry and for every company.

In the following section, we'll take a brief look at a few Snowflake customers who have customized their approach to digital marketing to drive success.



CHALLENGE

Air Canada, Canada's largest commercial airline, provided scheduled air transport to 37 million customers across 185 destinations worldwide in 2022. After the acquisition of Aeroplan, the company found itself managing different data sets—including flight bookings and revenue, point transactions, member profiles, and marketing campaign response data—across multiple on-premises and cloud-based environments. This meant that the Customer & Loyalty Analytics team was forced to locate, copy, and aggregate data at the customer level to run post-campaign analysis. The limitations of this process meant that it took weeks after campaign completion to have access to insights. Also, the process was not scalable, with insufficient capacity to perform post-campaign analysis on all campaigns.

SOLUTION

The company migrated from Teradata and other cloud-based and on-premises data platforms to Snowflake, which now serves as its primary data platform. The ease of accessing data in Snowflake helped streamline analytics processes. All data ingestion as well as pre- and post-marketing campaign analysis is now done in Snowflake, leveraging Dataiku as the data science tool. The Customer & Loyalty Analytics team can now curate audiences based on a data-backed, 360-degree view of the customer, assessing campaign performance at an individual level. This enables increased relevance, maximization of conversion, and shifting non-responsive targets to reduce opt-out rates.

IMPACT

- With Snowflake and Dataiku, a campaign analysis that once required two weeks now takes 3.5 hours to run, with a fixed one hour of data scientist time per week, as opposed to 20 hours per campaign.
- These rich insights allow the marketing team to better understand targeted marketing efforts, what's working and what's not, and to track key metrics like website traffic, leads, and conversions to optimize future campaigns for better results and help maximize marketing-spend ROI.
- Easy-to-apply data masking rules allow the airline to protect customer data, more easily and effectively complying with GDPR and other privacy regulations.
- Data scientists spend 80% less time doing data prep—thanks to advanced analytics processes automated by Dataiku and Snowflake—putting more effort into high-value deliverables.



Rich insights deliver better understanding of targeted marketing efforts, to optimize future campaigns.



CHALLENGE

Indeed is a leading job site with more than 300 million unique visitors every month. Indeed strives to put job seekers first, giving them free access to search for jobs, post resumes, and research potential employers. One of Indeed's goals is to offer a product platform that helps small business customers hire employees as quickly and easily as possible. To accomplish this, Indeed's marketing team needs to understand where the customer is on their hiring journey and educate them on advanced features that will help with hiring. But they had no single source of truth to rely on, so they had to replicate data to ensure proper insights, which resulted in inconsistent data. The data team had to build custom pipelines to connect those insights to marketing automation tools. As a result, marketing campaigns took several months to launch, and the marketing team lacked a standardized way of measuring results.

SOLUTION

Indeed implemented Snowflake to build a single source of truth that collected data from all sources into one governed location. Snowflake's agile data architecture enabled the scaling of workloads with concurrency. Data sharing features allowed collaboration between teams as well as with reference data providers and integration partners via Snowflake Marketplace. Thanks to the democratization of data across the organization, marketers were able to get self-service capabilities, leading to faster time to value.

IMPACT

- Marketing campaign launches went from several months to same day.
- Sizing audiences went from hours to seconds, enabling near-instant audience insights.
- Previously took a quarter to build and send to one or two audiences; now teams can build and send to 10 times as many audiences in the same time period.

Sizing audiences went from hours to seconds, enabling near-instant audience insights.



tapestry

CHALLENGE

Tapestry is a leading New York-based house of modern luxury accessories and lifestyle brands consisting of Coach, Kate Spade, and Stuart Weitzman. The company, which prides itself on being customer-centric, continues to exponentially generate more and more data. On a daily basis, it processes about 4 billion rows and runs more than 100 major data processes.

Tapestry's Data Science and Engineering team wanted to leverage all this data to optimize the supply chain, product design, predictability, and the propensity of customers to buy its products. However, the company's legacy Hadoop-based data platform was hard to scale and consumed a lot of time and resources to maintain. And so the team began looking for a modern enterprise data platform that could offer the speed and scale they required.


SOLUTION

Tapestry chose Snowflake as its modern enterprise data platform to support all of its brands and serve as its central data store. The company was able to double its data sources while still achieving significant cost savings compared to its legacy solution—all while maintaining high performance and minimal maintenance.

Tapestry leverages Snowflake's data sharing to acquire new customers; sharing data through its traditional data pipeline from its legacy system took around six to eight weeks and required 10-15 people to help orchestrate, but with Snowflake it takes less than half a day to set up and just a few more days for validation. In addition, by bringing on Tableau and other tools within the same Snowflake environment, the team was able to build out tools such as Apollo, its self-service customer analytics platform. Now that Tapestry has established Snowflake as its foundational data platform, the company is looking to leverage advanced features, such as Snowpark and Unistore, to allow smarter customer-centric decision-making.

IMPACT

- Tapestry doubled its data sources while still achieving significant cost savings.
- The company created a self-service customer analytics platform in Tableau, named Apollo, powered by Snowflake.
- All business users now have access to Tableau dashboards offering robust analytics capabilities they did not have previously.

A close-up photograph of a hand placing a coin on a surface. Several other coins are scattered around. The image is overlaid with a blue tint.

Tapestry doubled its data sources while still achieving significant cost savings.



CHALLENGE

Accor is a leader in enhanced hospitality, operating 5,300 hotels in more than 110 countries around the world. The company encompasses 40 brands ranging from luxury to economy, and about 10,000 restaurants and bars. Accor had three main data challenges:

- Extract data from multiple sources, collect it into one location, and format it so that users could have a single view of all data.
- Create and foster a “data culture” in which every employee understood how to collect and capture data the right way so it could be used in the most meaningful way.
- Be prepared for emerging technology and business trends such as AI.

Accor needed to have a platform that enabled the building of advanced algorithms.

SOLUTION

Accor implemented Snowflake to create a single source of truth for all of its employees. The team of data experts was able to switch to Snowflake seamlessly, and can now rely on a platform that safeguards data privacy by design. Accor has also launched a major initiative on data governance, and to give all users simple, guided access to the data mart built on Snowflake.

IMPACT

- **Accor is now able to offer a reporting dashboard to hotels that offers updated, accurate data.**
- **This data allows hotels to offer customers a personalized experience, whether they are interacting physically or digitally.**

Accor's single source of truth in Snowflake allows hotels to offer customers fully personalized experiences across digital and physical channels.



CHALLENGE

BODi helps people create sustainable healthful habits, with more than 2 million subscribers using BODi's online platform, which offers on-demand workouts, nutritional programs and supplements, and mindset classes. To support its customer retention and engagement initiatives, BODi ingests and analyzes large amounts of subscriber and order data. Previously, BODi's order data was stored in an on-premises data warehouse, while BODi's online interaction data was kept in the cloud, and data from BODi's online fitness community, mobile app, and marketing campaigns held in an enterprise data lake. This created multiple, disparate data processing and storage technologies. Siloed data prevented BODi from achieving a 360-degree view of the customer, inhibited marketing and distributor insights, and made it difficult to correlate behaviors that impact health goals. Technical constraints led to additional complexity that delayed time to insight and made some questions unanswerable.

SOLUTION

Seeking to effectively leverage data to support customer health and business outcomes, BODi centralized data ownership and reimagined its data architecture. BODi chose the Snowflake Data Cloud to serve as the "core layer" of its data architecture. Snowflake's near-infinite scaling of

storage and compute solved BODi's latency issues and allowed data teams to focus on eliminating complexity and unifying data. Consolidating customer video engagement, purchase history, and platform and marketing interactions in Snowflake increased transparency to BODi's customer journey and allowed BODi to deliver a richer customer experience.

Snowflake's ability to work with a wide array of industry-leading tools and technologies makes it easier to deliver actionable self-service insights for BODi's analytics users. Now, BODi's analytics environment efficiently delivers meaningful insights to support the diverse needs of multiple departments across marketing, product, finance, and operations. BODi's customer scoring system and insights provide marketers with the tools to personalize relevant content and develop campaigns that resonate, while ML models produce accurate forecasts for financial and operational needs. All of these data modernization efforts are enabling efficient data-driven growth across the organization.

IMPACT

- 240x improvement in query performance
- Delivery of new data elements to requestors in four days or fewer instead of six weeks
- Single source of truth for customer, distributor, and financial data sets

**With Snowflake,
BODi's analytics
environment efficiently
delivers meaningful
insights across
marketing, product,
finance, and operations.**



NEXT STEPS

Learn more about the modern marketing data stack and how Snowflake can help you improve yours—and get more value from your data.

INSIDE THE MODERN MARKETING DATA STACK

View the virtual event for insight from Snowflake CMO Denise Persson, a deeper discussion of the report findings, and conversations with customers who have modernized their marketing data stacks in the Data Cloud.

[WATCH NOW](#)

SNOWFLAKE FOR MARKETING ANALYTICS

Learn how the Snowflake Data Cloud can help you unify your fragmented data to empower superior customer experiences, optimal return on your marketing and advertising investments, and sustained growth.

[READ MORE](#)

CONTACT US DIRECTLY

Cut to the chase: Reach out to speak one-on-one with a Snowflake expert to learn how the Data Cloud can uplevel your marketing and much more.

[CONTACT US](#)

APPENDIX:

DETAILED METHODOLOGY

The goal of this research was to identify the technologies that have developed a significant, active customer base within Snowflake. The analysis was conducted over a 12-month period, from April 4, 2022, to April 3, 2023, looking at more than 8,100 Snowflake customers. The process was as follows:

Identify the full list of technologies for the marketing data stack:

- We looked at Snowflake's active customers' use of marketing technologies during the analysis period. Active customers are defined as:
 - A customer with either a capacity or an on-demand/self-service contract, with a contract end date that has not passed
 - A customer that has generated revenue for Snowflake in the last year
- The technologies considered as part of the four categories of Data Stack Foundational Tools must be active members of the Snowflake Partner Network (SPN), or have a comparable agreement in place with Snowflake. The technologies for the six categories of the Marketing and Advertising Domain-Specific Tools and Platforms must either be active members of SPN, or be [Snowflake Marketplace](#) Partners that have agreed to the Marketplace Terms and Conditions.
- Growth figures included all active Capacity and Self-Service customers as of April 4, 2022, with positive Snowflake revenue during the year ending April 3, 2023. Percentages reflect increased customer consumption of the respective tools within each category.

Split the technologies based on their type of Snowflake consumption: The multiple workloads that exist in Snowflake, combined with the optionality of different application deployment models available in Snowflake, means that vendors integrate with the Data Cloud in different ways and for different purposes. To accurately evaluate market leadership and adoption levels, particular metrics were applied to providers based on the type of Snowflake consumption. Specifically, the analysis consisted of splitting the technology providers into two separate categories: Technologies that use Snowflake's workloads for data integration, transformation, and analysis; and technologies using Snowflake's collaboration workload. The overlap for tools operating on both sides was less than 0.5%.

Identify key metrics needed to measure success of different marketing tools for each category.

- The metrics for technologies using Snowflake's core workloads for data integration, analysis, and transformation were:
 - Total number of active customers using the technology on Snowflake
 - Total credit consumption the technology uses on Snowflake
- For technologies using Snowflake's collaboration capabilities:
 - Total number of stable edges that include the technology. Stable edges are the ongoing relationships between providers and consumers of data. A stable edge is defined as a data share that has produced at least 20 transactions in which compute resources are consumed and such consumption results in recognized product revenue over two successive, three-week periods (with at least 20 transactions in each period).
 - Total credit consumption driven by data shares that the technology is using on Snowflake

Generate an index based on the type of Snowflake usage that illustrates the level of market penetration achieved by the technology, and complement it with how deep that usage is. The calculation is based on the following weighted criteria:

- Technologies using Snowflake's core workloads for data integration, analysis, transformation:
 - Breadth (50%): number of active customers
 - Depth (50%): total credit consumption
- Technologies using Snowflake's collaboration capabilities:
 - Breadth (40%): number of stable edges
 - Depth (40%): total credit consumption from shares
 - Spend (20%): consumption dollars, as a pointer for breadth of adoption of managed applications besides the data sharing usage
- Data enrichment category:
 - Breadth (100%): Number of stable edges, to prioritize measuring collaboration for enrichment purposes rather than size of different organizations' data sets

Rank/select the marketing technologies from 1 to N, where the lower number (ranking) is more favorable

Combine the full list of technologies across both groups and normalize this ranking between 0-100. (A score of 100 would be the technology ranked first across every metric.)

- Leaders represent the top technologies with the highest index in each category.
- Ones to Watch did not necessarily follow the leaders in their standing, but were selected based on multiple factors such as strong recent momentum in the market, innovative technology or approach with Snowflake, or have recently demonstrated strong customer capabilities.

APPENDIX: PARTNER PROFILES

In this appendix, we provide a little more information about the capabilities of each of the technology leaders featured in this report. Powered by Snowflake, industry-leading marketing and data technologies help marketers deliver compelling, measurable results, from reducing the cost and friction in marketing campaigns to bringing the right message to the right audience at just the right time.

Find, try, and buy live, ready-to-use data and applications to power innovative business solutions from many of these providers on **Snowflake Marketplace**.

ANALYTICS

Amplitude is a digital analytics platform that helps teams build better digital products and experiences. By providing self-service visibility into the entire customer journey, Amplitude helps teams understand what their customers love, where they're getting stuck, and what keeps them coming back. Building upon the company's integrations with Snowflake, Amplitude recently announced Snowflake-native Amplitude. Snowflake-native Amplitude allows joint customers to seamlessly and securely access self-serve behavioral insights directly within their Snowflake instance. Together, Amplitude and Snowflake deliver increased ROI for joint customers looking to take action on their data to drive active user growth, improve monetization, and increase retention. Learn more at amplitude.com/partners/snowflake

Data.ai provides the world's leading brands the visibility they need with AI-driven estimates to gain—and maintain—the most powerful competitive advantage. Data.ai helps businesses unlock an AI-fueled view of the mobile landscape at every stage of the customer journey. Through Snowflake Secure Data Sharing, organizations can gain insight into mobile app performance for strategic product, marketing, and growth decisions.

Funnel is the marketing data hub designed to help marketing teams own their performance. With Funnel, marketers can connect data from any marketing platform, and store, organize, and share it—all without writing a single line of code. Funnel takes care of building and maintaining the countless API connections and ensures that marketing data seamlessly integrates with Snowflake's Data Cloud. With Funnel and Snowflake combined, marketers are ready to unite all their data and unlock new insights.

Heap is a low-code, easy-to-use digital insights platform that captures a complete behavioral data set and syncs directly to Snowflake's Data Cloud. Data teams can access query-ready clickstream data in Snowflake via Heap Connect, a data sharing integration that seamlessly sends behavioral data into Snowflake. Marketing teams can sync user segments to Snowflake or combine behavioral data with other data sets for deeper analysis, activating their behavioral data to power targeted marketing campaigns. More than 10,000 organizations trust Heap to increase revenue, improve conversion, accelerate decision-making, and drive business impact at scale. Learn more at heap.io

Mixpanel enables marketers to get answers from their data in seconds. With a simple connection to Snowflake's Data Cloud without any code, Mixpanel helps marketers visualize and analyze user journeys and make data-driven decisions around awareness and conversion. Whether observing KPIs such as bounce rate, or doing a deep dive on attribution and campaign performance, marketers can quickly gain insight into the full user journey and drive growth across channels. Learn more about how 8,000+ customers unlock their data at mixpanel.com

Piano empowers every team to understand and influence customer behavior. By unifying customer data, analyzing behavior metrics, and creating personalized customer journeys, Piano helps brands launch campaigns and drive products faster, strengthen customer engagement, and drive personalization at scale from a single platform. Piano's flagship analytics tool, Piano Analytics, helps organizations seamlessly harvest digital device data and store it directly in Snowflake. This provides them with the power of the Snowflake platform for all device data, while organizing their data in one place without needing to maintain costly and complicated ETL processes. For more information, visit Piano.io

RudderStack is the cloud-native customer data platform that's purpose-built for data teams. RudderStack runs on top of the Snowflake Data Cloud and does not store data. This alleviates security concerns, reduces cost, and unlocks the value of Snowflake. Companies use RudderStack's end-to-end platform and flexible, powerful tooling to easily collect, unify, and activate customer data to drive growth for the entire business.

Snowplow, the first-party customer behavioral data collection platform, delivers a powerful solution for data-driven marketing: ***Snowplow Digital Analytics, powered by the Snowflake Data Cloud.*** By capturing detailed customer journeys and constructing actionable behavioral profiles, Snowplow equips businesses with valuable insights to optimize customer acquisition and experience. Leveraging Snowplow's direct streaming of first-party customer data to the Data Cloud, organizations can activate real-time data for Customer 360, personalization, and machine learning. Snowplow and Snowflake enable organizations to effectively reach, engage, and win customers while ensuring data governance and compliance. Learn more at snowplow.io

BUSINESS INTELLIGENCE

Domo puts data to work for everyone so that they can multiply their business impact. Underpinned by a secure data foundation, Domo's cloud-native data experience platform makes data visible and actionable with user-friendly dashboards and apps. Domo's native integration with the Snowflake Data Cloud helps customers get exponential value from their Snowflake data by putting it to work to drive better strategy and daily decisioning across organizations, while maintaining visibility and control of data assets. Domo helps companies optimize critical business processes at scale and in record time to spark bold curiosity that powers exponential business results. Learn more at domo.com

With **Microsoft's Power BI**, marketers can easily connect to, model, and visualize their data, creating memorable reports personalized with their KPIs and brand. They can get fast, AI-powered answers to their business questions—even when asking with conversational language.

MicroStrategy is the largest independent, publicly traded business intelligence company, with the leading enterprise analytics platform. Its vision is to enable "Intelligence Everywhere." MicroStrategy provides modern analytics on an open, comprehensive enterprise platform used by many of the most admired brands in the Fortune Global 500. Optimized for cloud and on-premises deployments, the platform features HyperIntelligence, a breakthrough technology that overlays actionable enterprise data on popular business applications to help users make smarter, faster decisions. For more information about MicroStrategy, visit microstrategy.com

Mode is the modern business intelligence platform that clears the path from data to insights to uplevel decision-making at every level of an organization. Mode embraces the way modern data teams work, so that data leaders can drive more efficient, higher-impact analysis and increased data maturity through true self-service. As the unified intelligence layer that connects directly to the Data Cloud, Mode maximizes modern data stack ROI and turns data into a competitive advantage for leading businesses across all sectors and stages.

Sigma is a cloud-native data analytics and BI platform for the cloud data era, named 2023 Snowflake Business Intelligence Partner of the Year. Sigma's intuitive spreadsheet interface empowers business teams to independently and collaboratively explore billions of lines of live data in the Data Cloud, as well as combine data sources, build models, apply Snowpark ML models, and visualize and present through Sigma Workbooks. Sigma's governance, authentication, and fine-grain permissions ensure security, and Sigma Custom Functions lets users apply complex logic in an instant. Sigma unlocks the power of Snowflake for more data-driven decisions across an organization while reducing data workloads and costs.

Tableau helps people see and understand data. Tableau offers visual analytics with powerful AI, data management, and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions. For more information, please visit tableau.com

ThoughtSpot's AI-powered analytics help innovative marketing teams empower everyone, including the C suite, demand and field marketers, and frontline store managers, to ask and answer data questions, and to create and interact with data-driven insights. They can use these insights to make informed decisions and deliver personalized customer experiences. ThoughtSpot is simple for any business person to use, yet built to handle even the largest, most complex data, wherever it resides. That's why customers have turned to ***ThoughtSpot*** to transform their data-driven cultures.

AI & MACHINE LEARNING

The **Alteryx** Analytics Cloud Platform helps everyone to make intelligent decisions with a unified, enterprise-grade, AI-powered platform. With its intuitive, easy-to-use experience, Alteryx makes unlocking insights accessible to employees across all skill sets and functions, including marketing. Users can transform data, solve data science problems, share rich insights, and build machine learning models—all while using the capabilities of the Snowflake Data Cloud. Together, Snowflake and Alteryx deliver the infrastructure and interface to power analytics for all.

Amazon SageMaker Data Wrangler makes it faster for data scientists and engineers to prepare data for ML via a visual interface. With SageMaker Data Wrangler, you can complete each step of the data preparation workflow, including data selection, cleansing, and exploration from a single visual interface. Once users have completed data preparation, they can take data preparation to production from the SageMaker Data Wrangler UI without the need to author PySpark code, install Apache Spark, or spin up clusters. Organizations can use Snowflake as a data source in Amazon SageMaker Data Wrangler to easily prepare data in Snowflake for machine learning.

Dataiku and Snowflake deliver a unique data and AI experience that empowers data and domain experts to build advanced analytics, streamline operations, and ensure visibility and trust in analytics efforts. All this is done on a single, collaborative platform that pushes down workloads to Snowflake for fast, secure, and cost-effective data processing, and that enables native support beyond SQL to Python, Java, and Scala with Snowpark. The result is a faster time to value from data and AI investments and increased trust in AI products.

DataRobot delivers Value-Driven AI, a unique and collaborative approach to AI that improves how organizations run, grow, and optimize their business. The DataRobot AI Platform is a complete AI lifecycle platform that ensures customer success with extensive ecosystem interoperability and a world-class team of AI experts. The DataRobot AI Platform and the Snowflake Data Cloud provide an end-to-end, enterprise-grade AI experience, empowering customers to scale models effortlessly, stay updated with advancements, and deliver rapid value. DataRobot integrations cover the entire AI/ML workflow, offering a code-free approach with seamless integration and a code-first approach utilizing Snowpark, the Snowflake developer framework. Learn more at datarobot.com/partners/technology-partners/snowflake

Hex is a collaborative workspace for data science and analytics. A single place for teams to explore, transform, and visualize data from Snowflake into beautiful interactive reports. Data scientists, data engineers, analysts, and ML practitioners use Hex to connect to the Data Cloud, combine SQL, Python, R, no-code, and AI in a collaborative notebook interface without switching tools or transporting data. Push both SQL queries and Python transformations down to Snowflake to take full advantage of the Data Cloud. Business stakeholders access visualizations built by data teams to ask questions and make better decisions.

Peak's AI platform lets users rapidly deploy and manage AI applications across an entire business. Peak's suite of configurable customer intelligence applications power personalized, relevant communications. Peak helps to identify segments based on unique customer attributes, preferences, and behaviors to be used across the marketing tech stack. This drives metrics such as increased revenue growth, return on ad spend, customer lifetime value, higher conversions, and engagement on campaigns.

RelationalAI is the AI coprocessor for the Snowflake Data Cloud. Its groundbreaking relational knowledge graph system expands the Data Cloud with integrated support for graph analytics, business rules, optimization, and other composite AI workloads, enabling better business decisions. With RelationalAI and Snowflake, organizations can build intelligent solutions where their data already lives, eliminating redundancies and reducing complexity, costs, and time to value. RelationalAI is used across industries—including financial services, retail, and telecommunications. Organizations are using RelationalAI to build intelligent applications that combat fraud, understand customer behavior, and execute complex business logic for business-critical workloads.

SAS is a market-leading provider of analytics, AI decision-making, and multi-channel marketing solutions that enables organizations to turn valuable insights into action. Together, SAS and Snowflake empower organizations with interactive, real-time, analytically driven insights in a single, secure environment. SAS enables organizations to quickly and easily access the data in Snowflake, to manage and model the data, deploy powerful analytics directly in Snowflake, and seamlessly activate those insights with advanced segmentation and audience creation to deliver personalized, omni-channel customer journeys.

ENRICHMENT

Affinity Solutions (Affinity) powers Comet, a powerful, data-led intelligence platform that lets marketers effortlessly plan, activate, and measure with complete confidence by linking campaigns to the outcome that matters most: consumer purchase. Powered by Snowflake, Affinity's Consumer Purchase Insights exclusively leverages the largest deterministic data set of consumer purchase behavior for the U.S. market to provide a complete, granular view of customer and prospect purchase behaviors, across and between brands and categories. Consumer Purchase Insights informs a wide array of growth strategies based on deeper audience understanding. For more information, visit affinitysolutions.com

Bond's Customer Intelligence Platform is an advanced solution that utilizes artificial intelligence to deliver real-world results. Marketers can securely integrate Bond's exclusive loyalty benchmarks, IP, and methodologies seamlessly into customer data—providing actionable insights and a tangible competitive advantage. They can leverage Bond's optimization capabilities, honed through years of experience in loyalty, engagement, and offer management, to drive customer lifetime value. The all-stack application effortlessly integrates with existing ecosystems, including leading martech environments such as Salesforce and Adobe—enabling faster speed to market and reduced total cost of ownership. Marketers can step-change their business growth and intelligence capabilities without the burden of significant financial investment.

Crisp is an open-data platform for the Consumer Goods & Retail industry that provides suppliers, retailers, and distributors with an automated feed of real-time data directly into the Snowflake Data Cloud. Crisp integrates with 40+ retailers and distributors, helping Snowflake customers to activate their point-of-sale and supply chain information instantly through a data share. Today, the Crisp Platform powers more than 500 CPG brands, retailers, and distributors with ready-to-use data they can utilize for a number of use cases, including OOS analysis, demand planning, pricing, promotions, and more. Learn more at gocrisp.com

Equifax offers a unique blend of differentiated data, predictive analytics, and cloud technology to help companies in diverse industries solve critical business challenges—from credit risk assessment and fraud prevention to data-driven marketing and analytical services. With in-depth views of market and credit trends, unique insights into household economics and business firmographics, and industry-specific curated data sets for modeling and analytics, Equifax helps financial and consumer brands uncover growth opportunities and spot hidden risk. Equifax is committed to meeting customers where they operate, with many robust data sets available for immediate ingestion via [Snowflake Marketplace](#), to uncover actionable insights faster.

Fetch brand partners elevate advertising and campaign attribution with richer consumer profiles and personalized segment insights with the Snowflake Data Cloud. This process securely combines external first-party data sources, allowing collaboration without the need to relocate, duplicate, or expose any personally identifiable information (PII) associated with the data. A Fetch data clean room powered by Snowflake provides cutting-edge insight into audience tracking and campaign performance in a secure, collaborative environment. Learn more at [business.fetch.com/trends-and-insights/fetch-data-clean-room](#)

G2 is the world's largest software marketplace with more than 2 million reviews of 150,000+ products. More than 80 million people annually use G2 to make smarter software decisions. G2's data sets bring software buying insights into the Snowflake Data Cloud. **Buyer Intent** monitors user behaviors when they are researching products and software categories on G2.com, and adds intent signals into journey mapping. G2 Review data provides fields collected from product reviews listed on G2, giving insight into review collection trends. **Market Intelligence** depicts a product's position in-market compared to competitors, providing insight into customer preferences, competition, and industry trends. Learn more at [sell.g2.com/data](#)

GlobalData empowers organizations to grow by enhancing sales and marketing programs with a unique combination of proprietary intelligence and audience access, resulting in better account prospecting, targeting, and profiling. With a media network serving 60 million business decision-makers and business intelligence across multiple industries, GlobalData combines first-party data with firmographic intelligence to enrich accounts with up to 100 million targetable data points. This results in hyper-qualified leads and actionable account intelligence, enabling organizations to increase sales conversion rates and marketing ROI. Solutions can be integrated effortlessly across the Snowflake Data Cloud with fully customized sales and ABM enrichment intelligence. Learn more at [globaldata.com/custom-solutions/solutions/sales-intelligence](#) and [globaldatamarketingsolutions.com](#)

Numerator is a data and tech company bringing speed and scale to market research with first-party, single-sourced consumer purchase and behavioral data from more than 1 million U.S. households for unbiased, total consumer understanding. Early investments in diversified trip capture technologies enable Numerator to have comprehensive, omnichannel visibility into traditional channels and emerging channels. Eighty of the top 100 CPG brands' manufacturers are Numerator clients.

SafeGraph produces data on physical places, from retail stores and warehouses to hospitals and parks. SafeGraph's point of interest database covers more than 49 million places in over 190 countries. Companies rely on SafeGraph data to power their applications, platforms, and services. Through the Snowflake Data Cloud, customers can seamlessly integrate and leverage SafeGraph's data, minimizing the distance between the data and insights generated.

Similarweb provides a leading data platform for digital intelligence, delivering a trusted, comprehensive, and detailed view of the digital world that empowers its customers to be competitive in their markets. Its proprietary technology analyzes billions of digital interactions and transactions every day, covering millions of websites and apps, and turns these digital signals into actionable insights. With Similarweb's data, business leaders, strategy teams, analysts, marketers, category managers, salespeople, and investors can quickly and efficiently discover the best business opportunities, identify potential competitive threats, and make critical decisions to capture market share and grow revenue.

TRUESTAR provides a free open data sharing service called Prepper Open Data Bank on the Snowflake Data Cloud. Data released by government agencies in Japan is very difficult to use; data analysts are forced to process open data, wasting their time. TRUESTAR's data sharing relieves their burden. As of July 12, 2023, the company has already released five databases with more than 200 tables and views on the Snowflake Data Cloud. Learn more at [en.truestar.co.jp](#)

As the most trusted leader in B2B data, **ZoomInfo** helps sales and marketing teams find, acquire, and grow customers by providing automated enrichment of the data they need to pinpoint their prospects and personalize their outreach. With ZoomInfo's vast suite of enrichment tools, customers can seamlessly merge all first- and third-party data directly in Snowflake's Data Cloud and automatically cleanse and enrich records to ensure accurate, augmented, and actionable data across their entire tech stack. Join more than 30,000 customers worldwide who rely on ZoomInfo to unlock insights, engage customers, and win faster. Learn more at [zoominfo.com](#)

IDENTITY & ACTIVATION: ADVERTISING PLATFORMS

Beeswax, part of the FreeWheel product portfolio, is a best-in-class buying platform offering unified UI and workflows; unique data access; and premium, curated omnichannel inventory. Built on the principles of transparency, customizability, and control, Beeswax enables customers to access and activate premium programmatic inventory.

FreeWheel, a Comcast company, provides comprehensive ad platforms for publishers, advertisers, and media buyers. Powered by premium video content, robust data, and advanced technology, FreeWheel makes it easier for buyers and sellers to transact across all screens, data types, and sales channels. FreeWheel's video advertising technology is built for today's ever-evolving multiscreen ecosystem. Simply, FreeWheel makes TV and video advertising work.

Magnite Access is an omnichannel audience product suite that makes it easier for media owners and advertisers to maximize their data assets today and in the future. Magnite Access's integration with the Snowflake Data Cloud provides a pathway for media owners and advertisers to activate their respective data assets across Magnite's streaming supply footprint, which spans more than 80 million CTV households in the United States, accounting for an estimated 90% of ad-supported CTV viewers in the country, based on Magnite's research. By working together, Magnite and Snowflake provide media owners and advertisers with flexibility to leverage data according to their business needs.

OpenAP and Snowflake have partnered to build the infrastructure for the future of premium video advertising. Announced in June 2022, the OpenAP Data Hub, powered by Snowflake's Media Data Cloud, is being designed as the central destination for cross-publisher and cross-platform campaign data and analysis. The OpenAP Data Hub allows publishers and advertisers to access rich, cross-platform data in privacy-centric environments to power more effective audiences for targeting and measurement. Learn more about the OpenAP Data Hub at openap.tv/video/openap-data-hub

OpenX is a supply-side platform that is a leader in advertising technology and is helping to create a world where the open web thrives. The company powers advertising on web, mobile, and connected TV formats, helping marketers reach their target audience across OpenX's global network of publishers. OpenX works with more than 130,000 premium publisher domains and receives more than 300 billion ad requests every day. OpenX is a certified CarbonNeutral company and is verified as having fulfilled its SBTi Net-Zero targets.

Sharethrough and Snowflake are building and testing a system architecture and privacy-compliant identity resolution capabilities required for advertisers to securely match and activate first-party customer data across the Sharethrough Exchange. The effort is meant to provide advertisers with the tools to safely target first-party segments while also improving performance and transparency for brands across all devices including CTV, desktop, and mobile.

StackAdapt is a leading self-serve, programmatic advertising platform that offers cross-channel automation solutions. Business leaders can make the most of their first-party data through real-time activation and orchestration in a multi-channel strategy. Snowflake and StackAdapt bridge the gap between advertising and data platforms, enabling marketers to create highly targeted and personalized campaigns efficiently. In a compliant and secure manner, users can automatically sync contact lists without manual uploads. Users can activate their data to retain and extend their reach to new audiences, while also planning, executing, and managing data-driven digital advertising campaigns across all devices, inventory, and publisher partners to maximize ROI.

The Trade Desk is a technology company that empowers buyers of advertising. Through its self-service, cloud-based platform, ad buyers can create, manage, and optimize digital advertising campaigns across ad formats and devices. Integrations with major data, inventory, and publisher partners ensure maximum reach and decisioning capabilities, and enterprise APIs enable custom development on top of the platform. Combined with the Snowflake Data Cloud, advertisers can utilize their first-party data on The Trade Desk to optimize their digital media buying campaigns.

Yieldmo is an advertising platform that helps brands improve digital ad experiences through creative tech and AI, using bespoke ad formats, proprietary attention signals, predictive format selection, and privacy-safe inventory curation. Yieldmo believes all ads should captivate users and be tailored to their liking. Yieldmo's platform helps brands deliver the best ad for every impression, thanks to its advances in AI, proprietary measurement technology, and close relationships with publishers. Snowflake's secure, flexible, cloud-based solution provides a reliable architecture for brands to share data with Yieldmo to enable these next-generation ad experiences.

IDENTITY & ACTIVATION: CUSTOMER DATA ACTIVATION

Acquia understands that as organizations collect more data than ever to create engaging customer experiences, many struggle to transform it into insights and actions that produce results. Acquia's customer data platform (Acquia CDP) delivers access to clean, processed, current data, allowing marketing teams to make data-driven decisions. Now they can use Acquia CDP with Snowflake Secure Data Sharing to supplement the CDP's analytics applications. With the combined solution, data is instantly shared from Acquia CDP's Snowflake account (data-provider) into the Snowflake account (data-consumer). No transformation, data movement, loading, or reconstruction is required. Visit [acquia.com](https://www.acquia.com)

ActionIQ is a new kind of customer data platform for enterprise brands, giving marketers easy and secure ways to activate data anywhere in the customer experience. ActionIQ's unique composable architecture means data can stay securely within the Snowflake Data Cloud, all while giving marketing teams the same data activation capabilities—audience segmentation, journey orchestration, identity resolution, and real-time personalization—that they expect from a CDP.

Amperity is a leading customer data platform (CDP) provider that helps customer-centric brands build the vital, first-party, unified customer data foundation required to truly know their customers. Amperity's unparalleled, innovative solution stitches together every type of rich customer data across multiple, disparate sources using patented AI and ML methods. Together with the Snowflake Data Cloud, Amperity allows diverse teams to use this accurate, trusted profile foundation to discover insights, create high-value segments, analyze business results, and fuel tools that deliver personalized customer experiences, turning data into business impact.

Braze is a leading comprehensive customer engagement platform that powers interactions between consumers and brands they love. With Braze, global brands can ingest and process customer data in real time; orchestrate and optimize contextually relevant, cross-channel marketing campaigns; and continuously evolve their customer engagement strategies.

Census is a leading data activation and reverse ETL platform that helps businesses sync 360-degree customer data from Snowflake to more than 160 business tools. As a Snowflake Premier Partner, Census has worked closely with Snowflake to develop new solutions that help customers extract more value from data stored in the cloud, including its newly released Audience Hub. By unifying first-party data and audiences, Census empowers businesses to drive more personalized marketing, sales, and customer service experiences. Census is backed by Andreessen Horowitz, Insight Partners, Sequoia, and Tiger Global. For more information, visit getcensus.com

GrowthLoop's Customer Segmentation Platform revolutionizes the way businesses activate their customer data by seamlessly integrating with the Snowflake Data Cloud. With lightning-fast speed, marketers can now unlock the full potential of their customer data to create personalized and targeted cross-channel customer journeys. By empowering marketing teams to leverage 100% of their customer data, GrowthLoop's solution enhances marketing effectiveness and drives meaningful results. Together with Snowflake, GrowthLoop helps businesses harness the power of their data, maximize marketing efforts, and deliver exceptional customer experiences. Learn more at GrowthLoop.com

Hightouch is a data activation platform that helps organizations turn their Snowflake data into action. The platform provides marketing and data teams with powerful features to organize, explore, and activate data directly from the Data Cloud into more than 200 downstream tools. With Hightouch, leading organizations unleash the potential of their customer data in Snowflake, transforming it into a composable customer data platform that powers personalized experiences, drives revenue, and ultimately grows their businesses. Learn more at Hightouch.com

HubSpot is a complete customer platform purpose-built for customer connection. It unifies an AI-powered smart CRM, engagement hubs, and an ecosystem of integrated applications to deliver frictionless, two-way connection across the entire customer journey.

Iterable is the top-rated AI-powered customer communication platform that enables brands to deliver joyful experiences with harmonized, individualized, and dynamic cross-channel communications at scale. Iterable's native Snowflake Data Cloud integration lets customers securely share and access Iterable first-party user data directly within their Snowflake account, to gain a 360-degree view of their customers—seamlessly joining and activating their *Iterable* and Snowflake data to drive customer engagement.

Enterprises using Snowflake find a powerful ally in **MessageGears**, a customer engagement platform that transforms real-time data into agile marketing strategies. With MessageGears, live customer data from Snowflake is accessible for segmentation and audience activation on any channel instantly—no copying, syncing, or moving data outside of the marketers' environments. This powerful combination provides enterprises with more agile, secure, and cost-effective operations than traditional marketing clouds. **MessageGears and Snowflake** amplify marketing ROI through dynamic campaign delivery and robust CDP capabilities.

Simon Data empowers marketing teams with a fully Snowflake-connected customer data platform purpose-built to increase campaign performance through faster, more precise segmentation and personalization. As a connected CDP powered by Snowflake, the Simon Data Platform enables brands to break free from outdated architecture that makes data hard to access and deploy. That's why Simon Data is loved by marketers and trusted by data leaders.

Twilio Segment is used by more than 25,000 organizations to collect, unify, and activate customer data to make real-time decisions, accelerate growth, and deliver world-class customer experiences. Segment offers a native connection to Snowflake with portable user profiles and reverse ETL functionality. This connection allows joint customers to provide data governance, data integration, and audience management all in a single place, simplifying data management from multiple touchpoints into one location through a single API.

Zeta is an AI-powered marketing cloud that leverages advanced artificial intelligence and trillions of consumer signals to make it easier for marketers to acquire, grow, and retain customers more efficiently. The Zeta Marketing Platform makes sophisticated marketing simple by unifying identity, intelligence, and omnichannel activation into a single platform—powered by one of the industry’s largest proprietary databases. Zeta enables enterprise customers to seamlessly mobilize data in the Snowflake Data Cloud to personalize experiences with consumers at an individual level across every channel, delivering better experiences for customers and better results for marketers. To explore the power of Zeta’s impact on enterprise marketing, download its *native Customer Growth Intelligence application* from Snowflake Marketplace.

IDENTITY & ACTIVATION: IDENTITY & ONBOARDERS

Axiom partners with the world’s leading brands to create customer intelligence, enabling data-driven marketing experiences that generate value for both people and brands. Axiom makes its industry-leading data and identity solutions available via the Snowflake Data Cloud to allow more brands to access valuable insights and extend first-party reach to win new customers and support existing ones. Axiom is a market leader in consumer privacy and data governance, whose privacy-by-design framework ensures data is ethically sourced and managed. Expert in cloud-first customer data management, data, identity, and analytics, Axiom has helped clients improve customer acquisition, retention, and growth for more than 50 years.

Aidentified Aidentified possesses the most extensive U.S. people database, encompassing household information (such as home address, inferred interests, marital status, etc.) and professional attributes (career, education, inferred income and wealth, social handles, etc.). It includes current and past contact details (emails/phones) for identity verification and tracks wealth-related events (IPOs, management changes, news mentions). Through mapping more than 12 billion first-degree relationships and more than 300 billion second-degree relationships, Aidentified reveals how organizations are linked to prospects via career overlaps, household members, and neighbors. Aidentified’s Snowflake Native App, Discover, enables users to connect their data to the platform’s data set, gaining valuable insights, match rates, and additional information at no cost through a clean room setup.

Experian, a data-driven marketing technology company, is proud to be recognized as a leader in the Identity & Onboarders category. Experian’s partnership with Snowflake allows it to provide enhanced identity resolution in a secure environment, giving partners a deep understanding of their data. Experian uses Snowflake’s platform to share data efficiently, strengthening its data delivery for advertisers, platforms, and measurement providers. Additionally, Experian facilitates high-fidelity data connections within Snowflake, linking disparate data sets to allow data collaboration across partners. With Experian’s trusted data expertise, marketers can gain valuable insights, develop personalized campaigns, and execute strategies across various channels and devices.

FullContact is a privacy-first identity resolution company building trust between people and brands. For over a decade, FullContact has been the foundation for achieving a 360-degree customer view that drives business growth and enables personalized and relevant customer experiences. The combined power of FullContact’s identity resolution Snowflake Native App and the Snowflake Data Cloud provides customers with a secure and efficient environment to unify and enrich customers’ online and offline data, resulting in a persistent and portable person ID. For more information, please visit fullcontact.com/partners/snowflake

LiveRamp uses a native application in Snowflake to help businesses to onboard, identify, connect, unify, control, and activate data across different channels and devices to optimize marketing efforts. LiveRamp’s leadership in accurate, person-based identity solutions delivers accelerated matching and profile creation, along with enhanced reach in audience activations over alternative identifiers such as cookies or hashed emails. LiveRamp offers comprehensive data collaboration capabilities, data pipeline solutions, and marketer-specific user interfaces to bring the power of a foundational identity to all marketing roles.

MediaWallah’s Identity Builder enables the management of identity data without needing to move or expose data. Snowflake customers can benefit from higher match rates; easier and more accurate targeting and activation of audiences; and easier merging, resolving, and analyzing of data. Real-time data feeds natively via the MediaWallah app so identity data is always fully updated to allow high match rates when resolving data sets, creating a high-fidelity crosswalk for measurement, targeting, and activation. Customers get access to a flexible set of capabilities, including data onboarding, data merging, resolution, and analytics.

Merkle’s identity resolution platform, Merkury, is integrated with the Snowflake Data Cloud to empower companies to leverage first-party data as a competitive differentiator. By bringing Merkury to Snowflake, it flips the traditional data management model, ensuring unparalleled security and accessibility. This enables businesses to harness and grow first-party data as a strategic asset, gaining deeper insights to better serve customer and prospect needs. With Merkury and Snowflake, companies can take control of their data, turning it into a valuable resource to understand customers and drive business growth.

TransUnion's TruAudience transfer-less Identity Resolution native app enables marketers to execute privacy-enhanced identity resolution and data collaboration use cases in the Snowflake Media Data Cloud. The app connects disparate offline and online data while enriching records with demographics by directly leveraging the TruAudience identity graph. Built-in machine learning capabilities for resolution improve the matching of records and the rate of appending new information. As a result, marketers can now supercharge actionable consumer insights to power audience segmentation, campaign strategy, and consistent marketing experiences across channels, with no transfers of data outside the Snowflake environment.

Unified ID 2.0 is a next-generation identity solution that is an open source digital framework. With initial development led by The Trade Desk, Unified ID 2.0 is the result of a broad collaboration of publishers, buyers, and technology providers across the industry. It serves as an alternative to third-party cookies that aims to improve consumer transparency, privacy, and control, while preserving the value exchange of relevant advertising across channels and devices. Through Unified ID 2.0's integration with the Data Cloud, advertisers and publishers can securely optimize their first-party data and make the most of digital advertising.

Verisk Marketing Solutions empowers marketers, data scientists, and platform partners to maintain a complete picture of consumer profiles and in-market behavior. These profiles help power personalized interactions aimed at engaging the right person with the right message, at the right time—all of which is compliant with state and federal rules for permissible collection and use of consumer data and right to opt-out. Verisk's identity graph maintains a current view of more than 250 million marketable U.S. consumers, including hundreds of attributes, real-time in-market shopping signals, demographic data, and much more. Learn more at marketing.verisk.com

INTEGRATION & MODELING

Adverity enables businesses to blend disparate data sets such as marketing, advertising, revenue, and sales to create a single source of truth for business performance. Through automated integration of hundreds of data sources and destinations, unrivaled data transformation options, and powerful data governance features, Adverity makes it easy to scale and automate marketing data operations. With a deep integration with the Snowflake Data Cloud, it gives marketers improved data accessibility and accuracy, meaning decisions can be made faster, with increased efficiencies and a real-time view of performance. Learn more at adverity.com

Airbyte is the open source data integration platform that syncs data from APIs, databases, and files to data warehouses, lakes, and other destinations. In addition to covering the long tail of connectors with the involvement of its community, Airbyte differentiates itself with its transparent and predictable volume-based pricing. Airbyte addresses all connector needs through its open source extensibility. Its mission is to make data available and actionable for everyone, everywhere.

Since 2016, **dbt Labs** has been on a mission to help analysts create and disseminate organizational knowledge. dbt Labs pioneered the practice of analytics engineering, built the primary tool in the analytics engineering toolbox, and has seen a fantastic community coalesce to help push the boundaries of the analytics engineering workflow. Today there are 20,000 companies using dbt every week, 65,000 dbt community members, 3,500 companies paying for dbt Cloud, and 750 dbt certified professionals. Learn more at getdbt.com

Fivetran automates data movement into the Snowflake Data Cloud. From startups to the Fortune 500—for analytics or operations—Fivetran is a trusted platform that extracts, loads, and transforms the world's data in the Snowflake platform. Fivetran automates the most time-consuming parts of the ELT process, from extracts to schema drift handling to transformations, so data engineers can focus on higher-impact projects with total pipeline peace of mind. With 99.9% uptime and self-healing pipelines, Fivetran partners with Snowflake to enable leading brands across the globe to accelerate data-driven decision-making and drive business growth.

Informatica, an enterprise cloud data management leader, brings data to life by empowering businesses to realize the transformative power of their most critical assets. Informatica has created a new category of software, the Informatica Intelligent Data Management Cloud (IDMC), powered by AI and an end-to-end data management platform that connects, manages, and unifies data across any multi-cloud, hybrid system, democratizing data and enabling enterprises to modernize their business strategies. Customers in more than 100 countries, including 85 of the Fortune 100, rely on Informatica to drive data-led digital transformation. Visit informatica.com

Matillion is the productivity platform for data teams. It makes data work more productive by empowering the entire data team—coders and non-coders alike—to move, transform, and orchestrate data pipelines faster.

Rivery is a 2019 SaaS startup that makes complex data integration simple. With a focus on digital native companies and a specialty in marketing data unification and activation, Rivery makes small data engineering teams feel powerful. Built-in end-to-end marketing data pipelines and data models can accelerate time to value, ingesting data seamlessly into the Snowflake Data Cloud, transforming it, and pushing it back into operational systems.

Talend combines data integration, quality, governance, and application and API integration in an end-to-end platform to unify data across any cloud, hybrid, or multi-cloud environment. Marketers can accelerate their migration to the Snowflake Data Cloud with Talend thanks to rapid ingestions and flexible integration approaches (ETL, ELT with SQL pushdown, real-time). The Talend Trust Score, native in Snowflake, instantly quantifies the reliability of any data set to deliver the trusted data everyone demands. With Talend's complete, flexible, and trusted platform for modern data management, data experts and business users alike can actively collaborate to discover, transform, govern, and share data across the organization.

MEASUREMENT & ATTRIBUTION

AdImpact is a provider of ad intelligence data solutions for media firms, agencies, platforms, and other organizations, helping customers gain practical competitive analysis, media research, reach and frequency reporting, ad attribution, incremental reach, and other critical marketing insights.

Comscore helps bring a cross-platform approach to media planning, in-flight campaign optimization, and measurement. Home to an expansive data set across linear TV, digital, OTT, and theatrical viewership, Comscore allows media buyers and sellers to understand cross-platform behavior and make business decisions with confidence.

DoubleVerify offers digital media measurement and verification solutions that help ensure the quality and performance of digital advertising campaigns. With a mission to make the digital advertising ecosystem stronger, safer, and more secure, DoubleVerify aims to preserve the fair value exchange between buyers and sellers of digital media. Snowflake supports DoubleVerify's internal BI, as well as client-facing analytics dashboards, reports, and data APIs. Snowflake's advanced capabilities enable DoubleVerify to efficiently process large data sets and provide clients with valuable and actionable insights that are used to analyze and drive advertising performance.

EDO is the TV outcomes company—a leading platform measuring convergent TV advertising for leading brands, ad agencies, TV networks, and entertainment studios. By combining real-time engagement signals with world-class decision science, EDO data maximizes creative and media performance. EDO is a preferred partner for Snowflake's Data Cloud, which enables seamless first-party data sharing between EDO and its partners, helping EDO deliver predictive outcomes data to clients in a simple, reliable, and privacy-safe way.

IQVIA Orchestrated Analytics is a suite of promotional engagement and performance management applications that enable life sciences teams to maximize their brands' market potential. Key capabilities include an HCP engagement recommendations engine, contextual decision intelligence, and tools to plan and adjust incentive compensation and promotional engagement. Backed by IQVIA's industry-leading data and infrastructure, including IQVIA Data-as-a-Service delivered via the Snowflake Data Cloud, it leverages decision intelligence powered by advanced analytics and AI to rapidly provide actionable commercial insights. Orchestrated Analytics is a core component of the IQVIA Commercial Solutions business, which also includes market and HCP reference data, information management, consulting and analytics, and HCP and patient engagement.

NCSolutions (NCS) makes advertising work better. Many of the world's most respected CPG brands rely on NCS's unparalleled purchase insights to target audiences, optimize and measure campaigns, and access turnkey clean room data solutions. Together with the Snowflake Data Cloud, NCS makes advertising more impactful and drives ROI for clean room investment. Visit ncsolutions.com to learn more.

The **Nielsen** Media Data Room (MDR) is a cloud-based platform that modernizes the way Nielsen distributes audience data. As census first-party data plays an increasing role in measurement, this innovation provides the industry with the means to access large data sets in an efficient, privacy-safe way. Nielsen's MDR has been brought to market using Snowflake's Media Data Cloud as the underlying platform. The first data available through this implementation is the Nielsen Respondent Level Data (NRLD), a modeled, representative subsample from 35 million homes, for U.S. national linear television.

Rockerbox is a leader in marketing measurement and attribution for B2C organizations. Rockerbox's data warehousing integrations empower entire organizations to access the vital marketing data they need by syncing it to their data analytics stack. When first-party data and ad platform numbers flow directly into the Data Cloud, the entire team is freed up to focus on what matters: marketing and customer insights that help move the needle.

VideoAmp is a measurement, planning, and optimization platform increasing the value of advertising by redefining how media is valued, bought, and sold. The platform unifies and automates advertising workflows, connects media exposures to an advertiser's sales, and deduplicates audiences across TV, streaming, digital media, and walled gardens. The partnership between Snowflake and VideoAmp unlocks value and insights for advertisers, publishers, and data owners, allowing a comprehensive view of cross-screen media measurement and optimization. VideoAmp has invested in industry-first technologies including clean rooms, granting unique and secured privacy-preserving access to first-party data, and integrations with social, streaming, and large digital platforms.

PRIVACY-ENHANCING TECHNOLOGIES

Habu's leading data clean room platform makes data collaboration safe, simple, scalable, and smart. Using Habu, enterprises create insights and outcomes from combinations of each others' data, models, and code, without sharing or moving data directly. Habu's complete interoperability allows partners to collaborate no matter their data or tech stack. Snowflake customers are able to easily install Habu on their Snowflake accounts, making it frictionless for customers and their partners to operate clean rooms directly from the Data Cloud. The combination allows partners to leverage the power of Snowflake's platform and ecosystem with full protections for privacy and governance.

lockr's solution, Identity lockr, enables publishers, retailers, and brands to quantify their exposure to anonymous machine-generated emails. Customers of the Snowflake Data Cloud can leverage Identity lockr on **Snowflake Marketplace**, securely syncing their audiences to validate the usability of their first-party data. Identity lockr complements identity strategies, ensuring that companies are collecting verified and usable data, thus improving the quality of their audiences and increasing match rates for the purposes of targeted advertising, subscription marketing, and audience development, while incorporating consumer consent and improving the customer experience. Learn more at loc.kr

OneTrust enables customers to collect, orchestrate, and activate purpose-based consent to automate privacy compliance, unlock actionable data, and deliver omnichannel experiences. As a centralized consent system of record for the modern marketing data stack, OneTrust integrates with thousands of systems to enforce and govern consent, preferences, and durable identifiers captured from multiple touchpoints. To learn more about OneTrust consent and preferences, visit OneTrust.com

Optable is a data management and collaboration solution designed for the advertising ecosystem in the age of privacy. Optable makes it easy for advertisers and publishers to use their audience data to plan, activate, and measure advertising campaigns while safeguarding individual identities. Designed for the business user, Optable eliminates friction in campaign workflows by allowing any partner to manage, share, analyze, and activate data within one integrated and interoperable cloud application. Optable customers reduce technology costs, increase operational and marketing efficiency, and grow revenue. The company is funded by Brightspark Ventures, Desjardins Capital, Hearst Ventures, and Deloitte Ventures.

Samoooha democratizes access to secure data collaboration and empowers businesses to harness the power of their insights and computing techniques. Samoooha's clean room product offers a dual mode, no-code web application as well as a developer edition for advanced analytics and AI/ML use cases. Launching as a native application on the Snowflake Data Cloud, Samoooha serves as a platform wherein an entire developer base can be empowered to build powerful applications anchored around data collaboration. Sign up for a free trial and learn more at Samoooha.tech

MARKETING CLOUDS

Adobe Experience Cloud is a robust collection of applications and services that solves the need for businesses to create personalized customer journeys. Solutions include customer journey management, data analytics and insights, content personalization, and commerce and marketing workflows. Adobe Experience Cloud is powered by Adobe Experience Platform, Adobe's open and extensible enterprise platform that transforms data into real-time, unified customer profiles that can be activated to deliver personalized customer experiences.

Salesforce provides a complete portfolio of products that unites sales, service, marketing, commerce, and IT teams on one integrated platform. Salesforce Marketing Cloud leverages AI + Data + CRM, fueling creativity with data-driven answers, saving time with GPT-powered campaigns, and redefining personalization at scale. Marketing teams can unify their customer data—including with secure, zero-ETL Snowflake data sharing—into a single profile to deliver real-time moments with Salesforce Data Cloud for Marketing. Marketers can automate personalized journeys and deliver individualized offers through any channel with Engagement, Account Engagement, and Personalization solutions. And they can drive effectiveness with Account Engagement and Intelligence tools that optimize marketing performance and spend, all through Salesforce Marketing Cloud.



ABOUT SNOWFLAKE

Snowflake enables every organization to mobilize their data with Snowflake's Data Cloud. Customers use the Data Cloud to unite siloed data, discover and securely share data, and execute diverse artificial intelligence (AI) / machine learning (ML) and analytic workloads. Wherever data or users live, Snowflake delivers a single data experience that spans multiple clouds and geographies. Thousands of customers across many industries, including 639 of the 2023 Forbes Global 2000 (G2K) as of July 31, 2023, use the Snowflake Data Cloud to power their businesses.

Learn more at [snowflake.com](https://www.snowflake.com)



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