



THE MODERN MARKETING DATA STACK 2025

How leading marketers are thriving in a world
redefined by AI, privacy and data gravity





TABLE OF CONTENTS

Something's Changed	3
CHAPTER 1	4
When a Trend Is Not a Trend	
CHAPTER 2	11
Five Factors Flowing from the New Normal	
CHAPTER 3	22
Postcard from the Edge	
CHAPTER 4	24
The Modern Marketing Data Stack in 2025	
NEXT STEPS	65
APPENDIX	
Detailed Methodology	67
Partner Profiles	69
Additional Partner Categorization	80



SOMETHING'S CHANGED

Marketers have never had so much information to help them make smarter decisions. The problem in today's marketing and advertising landscape is certainly not that the technology is lacking. This report features 89 of the best martech vendors, in an ecosystem bursting with more than 14,000.¹ But too often, a shiny new tool with dozens of capabilities is adopted for one specific purpose, and then it mostly sits on the shelf. The biggest challenge may not be the tooling, but the strategic mindset to arrange the tools in sequence to create a fully effective marketing data stack.

That's a challenge any year, but marketers today exist in a new world, and the moment no longer calls for them to incrementally up their game. It calls for a thorough rewiring of marketing strategies, tactics and talent.

This report offers a look at the martech/adtech arena as it stands in late 2024, calling out the trends that will shape 2025 and beyond. We spoke with both internal experts at Snowflake and prominent thinkers in the greater marketing world. And we updated our diagram

that defines the modern marketing data stack, relying again on data from within the greater Snowflake AI Data Cloud. (For details, see [Methodology](#).) The redefined stack not only identifies the leading vendors throughout, it also shows how the very shape of the stack has continued to evolve. Finally, we'll explore exactly how leading marketing organizations are building success in the AI Data Cloud.

Last year we talked about four principal trends: the convergence of adtech and martech tools; the emergence of generative AI and large language models; the continued elevation of privacy concerns; and the drive toward a unified, "single source of truth" data strategy. Each of those forces continues to shape the marketing landscape, but this year, we're recognizing that three of them, in particular, are not just influencing the marketing landscape — they have reshaped it, permanently. The report starts not with a look at emerging trends, but the new normal from which the next changes will emerge.

¹ "The State of Martech 2024," by Scott Brinker and Frans Riemersma, May 7, 2024

The background features abstract, overlapping blue curved shapes on the left side, transitioning to a solid light blue on the right.

01

**WHEN A TREND
IS NOT A TREND**



CHAPTER 01

WHEN A TREND IS NOT A TREND

Trends come and go. The Hula-Hoop. Bell bottoms. Pet rocks. Lip liner. Bell bottoms again. Apparently for a few years in the '80s, teenage orcas wore dead fish on their heads as a punkish fashion statement. (We're not making that up.) But not every change is so transient (or weird). Tamagotchi toys? Trend. Smart phones? Game-changing new normal.

When looking at trends in the marketing landscape, it's important to separate fads from foundational shifts. A trend is directional but subject to change, like an ocean current. Keyword stuffing? A trend obviated by more sophisticated search algorithms. Higher concern for consumer privacy? Not a trend, but a permanent focal point of the marketing and media environment. In other words, it's not an ocean current — it's the water.

In putting together this year's "Modern Marketing Data Stack" report, we were conscious of the difference between trend and new reality, between the currents and the ocean. To begin this look at the martech landscape of 2025 and beyond, we must start with the fundamental changes that define the new environment through which trends and technological innovations move.



Three factors mark a decided change from the martech baseline of a few years ago, creating as significant a reordering of priorities, opportunities and obstacles as the smart phone did 15 years ago. Those factors are:

- **Generative AI.** The ability of advanced large language models to generate words, images, video and code based on natural-language prompts will redefine how, how quickly and how effectively marketers build and understand their audiences, and how they create, launch and measure campaigns.
- **Privacy.** Consumers and regulators were a little slow on privacy, while many marketers and tech makers were more focused on the power and potential of new technologies. Today, solid privacy practices are the prerequisite for impactful and ethical marketing, requiring marketers not only to meet regulations, but to meticulously arbitrate signals of consumer choice, preference and expectation.
- **Data gravity.** This is the clear tendency for organizations to eliminate silos, unify all data and attract more data, as well as the applications that use it. Data is expensive to store and move in large quantity across multiple data stores and data marts, and it's complex to govern for both security and privacy needs. Thus, once it's in a stable and secure repository with minimal siloing, you increasingly want to work with the data where it lives. In today's paradigm, application processing is moving to the data, not the other way around. And with this shift, the marketer enjoys a new position of empowerment through the rise of first-party data. More on that below.

As we'll see, these three elements of the new martech normal are closely intertwined and self-reinforcing. They also give birth to a number of actual trends. No salmon hats, but important movements in the marketing landscape, from the advent of the truly data-empowered marketer to new trends in the measurement of marketing effectiveness. We'll get to those. First, let's explore the new normal a bit further.





GENERATIVE AI

What's amazing about generative AI is not necessarily what it puts out, but what it lets you, the nontechnical user, put in. It's an absolute game changer to be able to ask the application sitting on top of all your data a question in natural language like, "How many existing customers spent more than \$1,000 with us in the past six months?" and get an answer immediately — without needing to track down technical help to translate that question into something that looks like this:

```
SELECT
    c.CustomerID,
    c.FirstName,
    c.LastName,
    c.Email,
    SUM(o.TotalAmount) AS TotalSpent
FROM
    Customers c
INNER JOIN
    Orders o ON c.CustomerID = o.CustomerID
WHERE
    o.OrderDate >= DATEADD(MONTH, -6, '2024-10-01')
GROUP BY
    c.CustomerID,
    c.FirstName,
    c.LastName,
    c.Email
HAVING
    SUM(o.TotalAmount) > 1000
ORDER BY
    TotalSpent DESC;
```

And then the app builds out the dashboard, charts and whatever else you need on the fly, without another half-dozen SQL iterations — all in the amount of time it took you to read these last two paragraphs. And those quick-turnaround results are in simple, conversational language a marketer can understand, without needing a data scientist or other technical expert to translate. That also means the marketer can quickly iterate. It's not just that you can ask a question of your data in plain language — it's that you can go back and forth, refining and getting to the most essential answer.

That's the genius of generative AI for marketers: not so much what it can do as much as what it can let you do, easily and immediately. It starts by giving you deeper insights into the needs and behaviors of your customers, and it lets you segment and target them accordingly. And that greater understanding can be applied with natural language and automated systems that iterate on a campaign's creative content. And marketers can slice up granular audience segments, help define customer personas, run predictive analytics, draft creative elements, activate and optimize across multiple platforms and channels, and measure results. A multiweek workflow across the half-dozen teams with ownership of — and expertise in — your complex array of martech tools will be simplified because each of those tools will be designed to respond to you as a marketer — and to each other — in a human-centered, natural-language way.

This is insight, execution and automation literally at your fingertips. It empowers every marketer to think about goals, strategies and results rather than tools, code and spreadsheets. The focus for modern marketers becomes about optimization. And though these capabilities are not yet fully realized, they're coming fast. In the "State of Martech 2024" report, authors Scott Brinker and Frans Riemersma note, "Nearly every major martech vendor has added generative AI features into their products."



And hundreds of new martech startups (or seedlings of startups) have been born natively on the back of LLMs.”

At the same time, that future isn’t entirely here yet. When we spoke with Myles Younger, Head of Innovation and Insights at U of Digital, he said that the martech and adtech teams his organization trains are still easing into the AI era.

“Our customers seem to be at the very early stages in the AI category,” Younger says. U of Digital educates and trains revenue-generating and client-facing teams at adtech companies and other players in the wider marketing industry. “The business users we work with don’t need to dive deep on AI technology yet. I suspect that their company roadmaps are not far enough along on AI yet. In a year or so, they’ll need to go deep on AI to talk to their clients about it.”

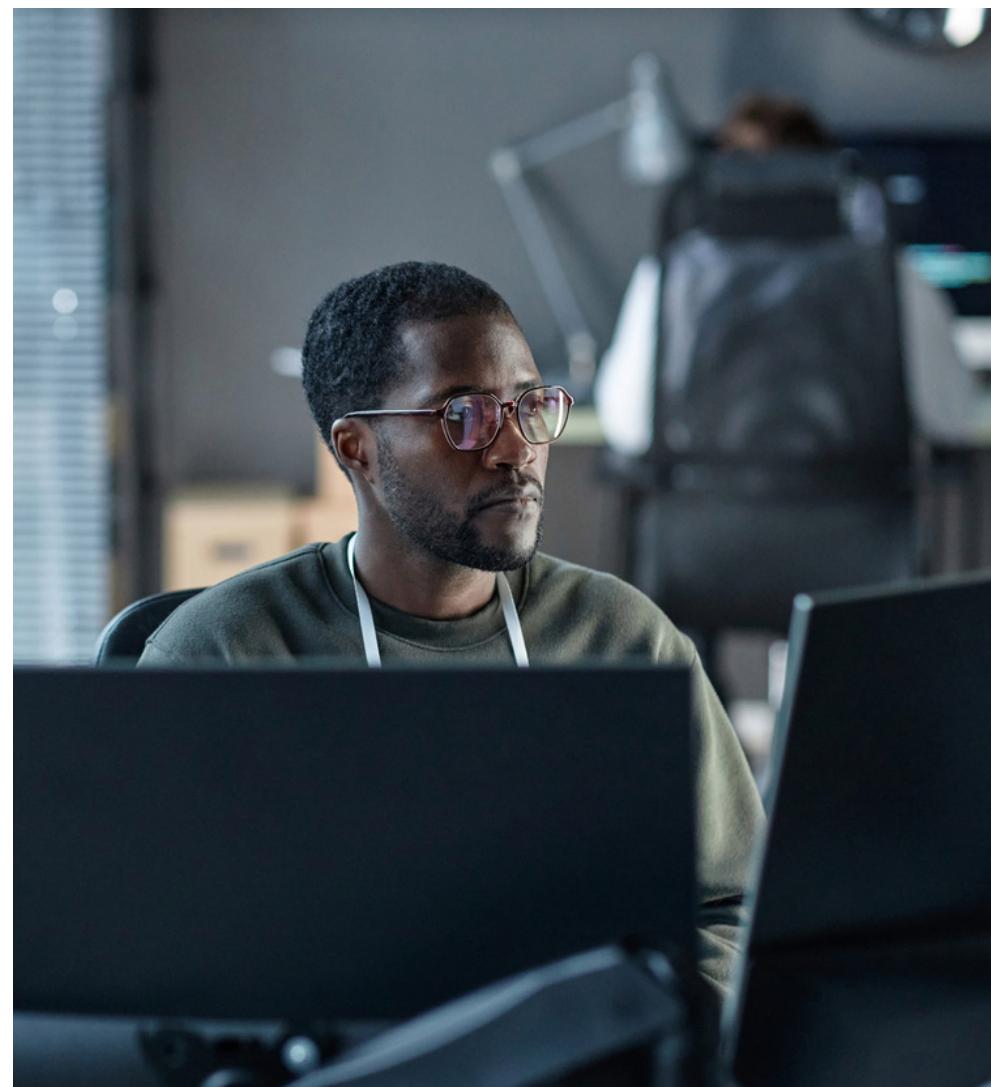
That transition will hit martech and adtech vendors hard and fast; the pressure to catch up will only intensify. Younger points out that customers hungry for great AI features will not compare them to their direct rivals. The pressure will come from everywhere.

“Zoom out broadly to the landscape of business productivity software — your finance software, your security software, all of it. Innovators in those spaces will push out amazing features that save people significant amounts of time in their work,” he says. “You’re gonna end up with a universe of global business people who have come to expect all of this convenience over the next couple of years. They’re gonna say, ‘Hey, my HR team has some amazing features in their software that’s allowed them to save tremendous amounts of time. Why am I not seeing this in my martech software? Do I need to look at a different vendor?’”

This infusion of AI throughout the martech stack will allow the marketer to create business value directly, reducing the strain on their technical counterparts because much of the “conversation with your data” will

take place in natural language, not SQL or Python. Repetitive technical processes and rote activities will be automated. The nontechnical marketer will be largely freed from the potential bottleneck of overburdened data engineering and data science teams, with a resulting surge in speed and productivity.

This will change how marketers work and think, specifically giving birth to a trend we’ll address further below: the data-empowered marketer.





PRIVACY

Privacy is the new baseline. Marketers need to meet high privacy standards. This encompasses both the appropriate handling of personally identifiable information and customer expectations of transparent communications and data-sharing practices. Both are often governed by a patchwork of regional regulations, but privacy also encompasses the trust necessary in a one-to-one relationship between a customer and a brand. Reputations soar and crash quickly in a digital reality fueled by social media. And in many industries (finance for one, healthcare for another), there are huge legal and regulatory liabilities.

There's a tension here. Marketers want to use data to better communicate the right message to the right person at the right moment. And consumers consistently reward brands that can provide a seamless, engaging, highly relevant experience.

And the use of LLMs to draw deeper insights and generative AI to create more personalized campaign creative will compound the data privacy challenge. The models will need more data to facilitate these powerful use cases — the same data that must be kept secure and private.

"Be exactly what I want all the time, but don't know too much about me" is a hard needle to thread. And the eye of the needle is value. Brands today must authentically create value for their audience, so that there's an equitable and trusted exchange for the user's data and sense of privacy. For some brands, that's a differentiator. Across the board, any business must project a considerate and trustworthy face, all the while delivering the high-quality customer experiences that are generally driven by this carefully managed data.

This creates a new paradigm for data control, for ownership and governance. A lot of things that have been outsourced to external parties are now top-of-mind for the brand, who's charged to act in the best interest of those it reaches out to.

These are not new problems, but marketing organizations are nowhere near solving them. There can be, in fact, no one solution. Privacy is not a project you finish. New laws will be floated, modified and enacted, such as [The American Privacy Rights Act](#) which, at the time of publication, is working its way through the U.S. Congress. New challenges will arise, and old ones get new twists, such as Google's summer [decision](#) to not take the third-party cookie off life support. Trends will come and go, offering new tactics to build and segment an audience, and to frame and assess the campaigns and experiences we offer. Specifically, the next chapter of this report will explore trends in terms of first- and third-party data, plus approaches to campaign measurement.

**THERE IS NO ONE SOLUTION.
PRIVACY IS NOT A PROJECT
YOU FINISH.**



DATA GRAVITY

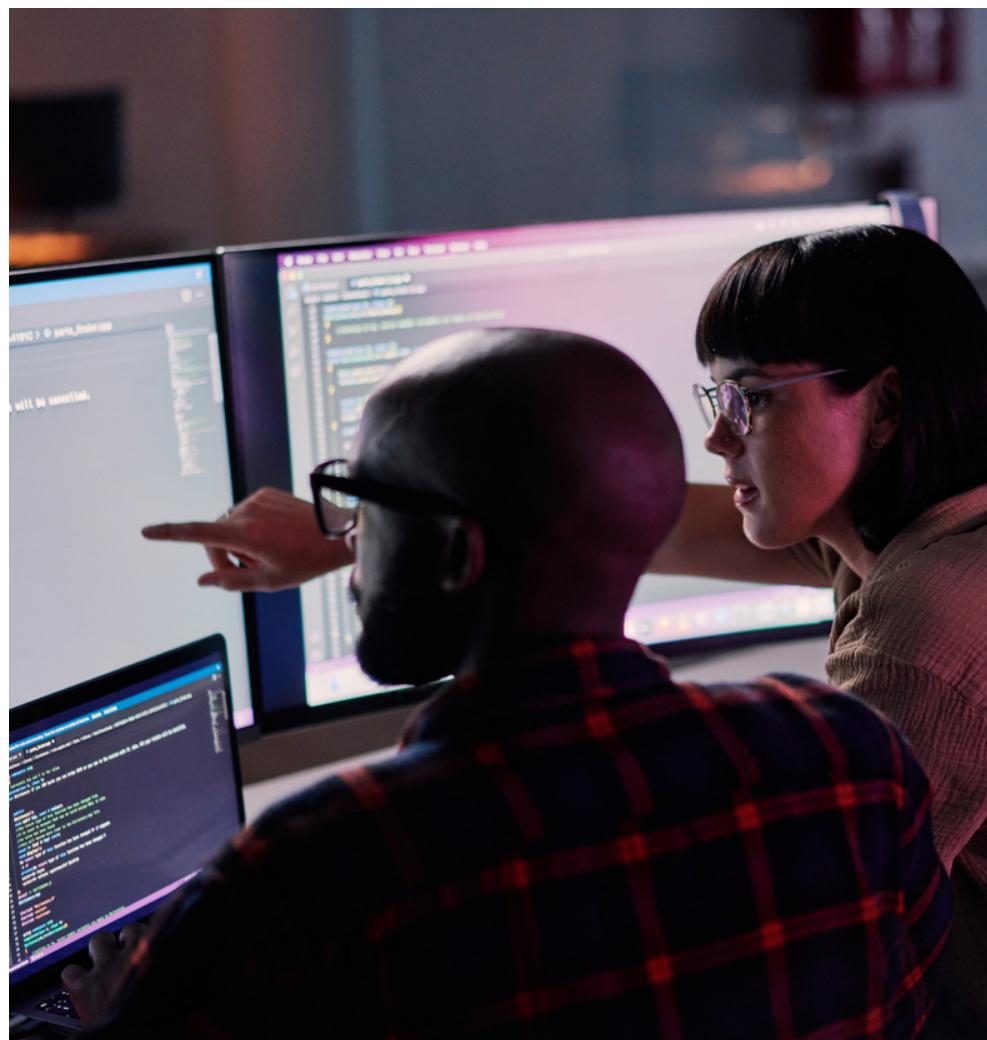
The conversation about “breaking down data silos” goes back more than a decade. Every organization tries to break them down, but of course every new application brings the potential for new silos. It’s a never-ending battle. Before generative AI, the silo discussion was mostly about optimizing outcomes: Bring multiple isolated data sets together and you’ll understand your audience more deeply, target your message more accurately, and improve your outcomes measurably.

Good stuff, but also kinda optional — very much a best practice rather than an inescapable requirement of doing business. Every marketer at some point has worked for a company that got through the fiscal year and chalked up a profit without tapping the potential of truly unifying their marketing data.

In the age of generative AI, unified data will be existential, not incremental. Advanced AI is going to deliver step changes in how businesses function, and LLMs will need to draw from quality data throughout the enterprise. Your corporate LLM will not run solely on marketing data. It will provide marketing insights based on secure, enterprise-wide, properly governed and access-managed data.

Over time, we have more sources of customer data, more marketing and advertising channels to act upon it, and more concerns around privacy, security and consent to manage. It doesn’t make sense to transmit subsets of your data to the dozen (more likely, dozens of) SaaS tools in your marketing data stack. It becomes hard to keep track of it all, and it’s impossible to update everywhere when something changes. Privacy requirements, practical efficiency, and the potential of generative AI to work with a complete and authoritative data set are forcing organizations to tell their software vendors, “Make your app work with my data where it resides. You have to come to us.”

Marketers have long sought to unify their data in marketing-specific platforms and tools. But marketing is becoming part of the enterprise data domain rather than its own environment that is set up and managed by an external provider. As marketing data is pulled into the enterprise data foundation, it creates new opportunities, but also requires applications to evolve, as we’ll see in the next section.



02

FIVE FACTORS FLOWING FROM THE NEW NORMAL



CHAPTER 02

FIVE FACTORS FLOWING FROM THE NEW NORMAL

The rapid evolution and diffusion of AI, plus heightened focus on privacy, plus the imperative of data gravity, define the modern marketer's environment — the water in which we're all swimming. But which way is the water flowing? What are the current currents, the trends? Through conversations with experts and in exploring how marketers engage with technologies within the AI Data Cloud, we've identified five key trends as we move into 2025:

1. THE DATA-EMPOWERED MARKETER

AI technologies will change how marketers work, what's expected of them, and the skill sets they'll employ.

2. THE SOPHISTICATED, DATA-CONNECTED APPLICATION

Data gravity is drawing applications to unified, single sources of data, where the work can be done in a more secure, governed and efficient manner.

3. OLD AND NEW MEASUREMENT STRATEGIES

The promise of one-to-one measurement always rang a little hollow, but with more privacy concerns and less reliance on third-party data, marketers must pivot.

4. THE INCREASED VALUE OF FIRST-PARTY DATA

As third-party signals become fuzzier, high-quality first-party data becomes vital, not just to backfill the loss, but to drive new marketing strategies.

5. THE RISE OF COMMERCE MEDIA

Hey, if you've got the first-party data and direct access to your audience, congratulations — you're now an ad platform.

Each of these trends rises from the interplay of the greater foundational factors and points toward both how to score near-term competitive wins and how to evolve your approach to marketing technology — and marketing itself — in the longer term.



1. THE DATA-EMPOWERED MARKETER

Scott Brinker, co-author of “The State of Martech in 2024” and editor of chiefmartec.com, tells us that generative AI will unleash the creative powerhouse that lurks in every overwhelmed marketer today. “In ‘Jaws,’ they said a shark is the perfect eating machine,” he says. “Well, the best marketers are perfect question-generating machines. They are a wellspring of curiosity. It feeds their creativity. But until now, the cost of answering most of those questions has been so high that we have yet to truly unleash their imagination with the art of the possible in a digital world.”

Digital has reduced the cost of implementation and iteration, he notes, but there are still significant barriers of budget, technology and dependency on experts in the chain.

“AI really will reduce all of that further so we can get more questions answered, more quickly, and more ideas from concept to execution in the field much faster,” Brinker says.

Myles Younger agrees that marketers will be able to do more, and adds that they’ll also have to know less — about martech tools, at least.

“There’s a class of adtech or media-buying solutions — Google’s Performance Max, Facebook Advantage+, and Snapchat, TikTok and Microsoft each have one — that are a resurgence of the old-style black boxes,” he says. “The premise is that these systems will learn who

your perfect customer is and how to find them online, and will then automatically and dynamically generate entire marketing campaigns on a performance or outcome basis to go reach those people.”

Compare that, he says, to the more hands-on approach you’d need to run Google Ads (previously AdWords). “Google Ads is kind of a bewildering NASA command center of how to run ad campaigns,” Younger says. “People literally make their entire careers getting good at Google Ads. And Performance Max wipes all of that completely away. It just says, ‘Nope, your arcane knowledge of how to work Google Ads is not relevant. Just give me a target to hit and sit back.’ It’s certainly a lot more time efficient. That model, I think, is just going to rage through the industry like crazy.”

If you disintermediate data engineers from basic query tasks by giving marketers a way to directly interact with the data, and you automate away a lot of the time-consuming and complex steps of getting a campaign from conception to activation, and you trust the AI to optimize performance, what exactly does the human marketer need to bring to the equation? Focus and vision, Younger says.

“The marketer’s role will be to clearly articulate the desired outcome,” he says, “or your AI will optimize toward some wrong or tangential outcome — 10x faster, but in the wrong direction.”



Managing these tools, he says, requires the marketer to be less of a tool user and more of a manager. You operate a tool, but you'll manage AI. "I think about AI in the marketing world sort of like a direct report or an agency that you've hired," he says. "When you interact with freelancers, agencies or your team, you get the highest-quality work out of them by being very clear, letting them do their work, and having a clear plan of accountability."

All this adds up to a significant surge in productivity. Marketers will be able to answer more questions, try more techniques, launch more and/or better campaigns, and build more quickly on the results. This means the marketer becomes an end-to-end campaigner who understands the entire marketing process and has the ideas to build on ambitious strategies. There will be less call for the deeply expert martech specialist, the savant who knows just how to turn one set of dials; but the creative, holistic thinker will be in high demand.

And on the technical side, data teams will also be more productive and freed from some of their least-favorite work. Even as they are disintermediated from the process of marketers getting basic insights from their data, data teams will be more closely tied to their nontechnical counterparts. The technical data expert will have a more strategic role, entering the process earlier to understand challenges and opportunities, and scope out which data is needed. The gap between technical and nontechnical teams will shrink, with each side contributing higher value work.

WITH AI AND AUTOMATION, WHAT DOES THE HUMAN MARKETER BRING TO THE EQUATION? FOCUS AND VISION.



2. THE SOPHISTICATED, DATA-CONNECTED APPLICATION

Data gravity means the data all sits in one place and resists (through cost and governance) being moved or copied, which offers the advantage of being able to surface new and better insights from unified data. The obvious implication is we won't be copying out huge chunks to a dizzying range of SaaS applications.

"The way that marketers will leverage all their data in more of their frontline apps and operations is by bringing the app to the data, which I'm seeing everywhere," Scott Brinker says.

That calls for a new, more sophisticated application that's either native to a brand's data environment or that connects directly into a brand's data. With the connected application, storage and processing are centralized through pushdown queries to the brand's data environment, but the user interface and orchestration are mainly maintained by the vendor. Snowflake's Native Apps have similar benefits but because they're deployed inside the customer's data environment, there are no procurement hurdles, and they are more secure as they are governed within the enterprise perimeter.

As IT leaders decide to make their procurement decisions based on an application's ability to work with a single source of data, vendors — including large-scale CDPs — are building direct integrations into the data platform to meet their customers where the data is. Even the most sophisticated and complete workflows are beginning to connect directly or natively to the data layer, removing most limitations for marketers to run their entire end-to-end workflows on a single source of truth.

This also delivers an advantage to the martech tools. As they integrate more generative AI capabilities, they'll need more data to make them effective. Bringing their solutions to a customer's full data platform — rather than working from a limited, copied slice of that data — is what gen AI needs to accurately deliver insights.

“

Thorough integration of data across the organization can't be managed point-to-point at scale. Instead, you need a common data layer that all apps across the enterprise can leverage.”



SCOTT BRINKER

*Editor,
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Consider the mighty, broad-functionality CDP. A lot of what it does is give the customer a marketing-specific data foundation to integrate, sync and harmonize data. As the enterprise consolidates what amounts to a big marketing silo into a comprehensive data environment, that functionality will change and in some ways be complemented by the larger enterprise data platform. Thus, the best value propositions of CDPs and more focused solutions, amplified by artificial intelligence, will involve how they deliver direct business impact.

And consider the composable stack, in which an organization assembles a specifically chosen set of tools to meet its specific needs in lieu of the more comprehensive CDP approach. Composability, Scott Brinker says, is an overblown term, but a concept that will benefit from both data gravity and the connected/native app.

“‘Composability’ sounds like a complex technical term,” says Brinker, who is also HubSpot’s VP of Platform Ecosystem, “but it’s basically just the ability to easily access data and services from across your organization and incorporate them into new campaigns, programs and customer experiences.”

Composable apps will need to be integrated with your data and with each other, and the old way of painstakingly stitching each app to the data and to each other will have to go.

“Thorough integration of data across the organization can’t be managed point-to-point at scale,” Brinker says. “Instead, you need a common data layer that all apps across the enterprise can leverage.”

That’s not to say the evolution of the sophisticated data app is just a composability issue. Packaged SaaS apps also are gravitating toward the enterprise data layer, and they’re using advancements in data sharing to make that happen without copying and moving data.

The move to the native/connected application is both a boon to the data-powered marketer and a new responsibility. At the least, it calls for a new muscle. In [“The State of Martech 2024”](#), Brinker and Riemersma note that building a composable stack is conceptually like fitting together Lego blocks. To create enterprise-scale martech stacks is a lot of work, they say. But the hard part isn’t snapping the blocks together.

“It’s the design and implementation of the experience you want to deliver to customers or employees that takes talent and operational savvy,” Brinker says. “Composability is a means to an end. Your strategy needs to focus on those ends, and composability is simply an enabler to achieve them.”



3. OLD AND NEW MEASUREMENT STRATEGIES

The promise of digital marketing is that it's highly measurable. Digital delivers greater visibility into user behavior, engagement and overall campaign performance. The ability to measure impressions, clicks and conversions to both understand a customer's journey and identify the most effective messaging tactics has revolutionized the art and science of marketing.

Arguably, that promise has never been fully realized, though marketers are light years ahead of where they were in the pre-digital era. In 2025, though, the two headwinds we've been discussing — more privacy and fewer third-party trackers — will make measurement more difficult. It can be harder to track a user's journey across multiple websites (but you can, at least sometimes). It's harder to identify the same user across multiple devices (but you can, sometimes). It's harder to share data with partners in the martech/adtech world (but, again, you can).

We're seeing two trends that, in conjunction, provide an effective approach to this challenge. If privacy, in particular, is an obstacle to more precise measurement, data clean rooms represent a respectful and compliant path through that obstacle, while the resurgence of media mix modeling is a sort of detour, a way of reaching the ultimate goal by a different route.





MARKETING MIX MODELING STAGES A COMEBACK

Marketing mix modeling (MMM) is a statistical method for analyzing the performance (conversions, sales, etc.) of marketing activities. Incorporating multiple data sources, including first-party data, and applying advanced algorithms, MMM measures the relative contribution of each marketing channel and campaign. Crucially, in a world of multiple online and offline touchpoints, MMM provides a solid overview of the interplay between various channels, rather than measuring each in isolation.

In the past decade, MMM fell out of fashion. For one thing, it was more expensive, more often used in conjunction with a nine-figure ad budget than with six- or seven-figure budgets. For another, why chase averages and estimates when you could try to map every action of every customer, nearly in real time? And the bottom line: Data was so often scattered across various silos that MMM was often not a practical possibility. Amid rising challenges to that never-realized one-to-one measurement ideal, marketing mix modeling has staged a comeback.

Myles Younger stresses that this is not a retreat. For one thing, that one-to-one dream was at best an over-promise and at worst misleading for marketers. For years, data has been misapplied or misunderstood in the analysis, and some measures (last-touch attribution, we're looking at you) have been given inflated importance.

"The premise 10 or 15 years ago was that with sophisticated enough one-to-one tech that had data on enough addressable consumer profiles, you had a cheat code to instant advertising performance," he says. "But in reality, advertising and marketing needs more than one-to-one techniques to be successful."

With that one-to-one picture seemingly under threat, marketers have been returning to the broader, statistical approach of MMM. It's not a stand-in for person-level data, and it's not helping you add a few more degrees to your customer 360, but this aggregate-level data is still powerful.

As marketers spent the past few years bracing for a "post-cookie world" that isn't quite coming, there was concern that statistical measuring would be sub-par, but Younger says not to worry.

"Measurement becoming more probabilistic doesn't damage the activity or practice of advertising," he says. "It'll be just fine with probabilistic measurement because one-to-one was never fully comprehensive, and what marketers were getting was actually an inaccurate picture. There's even a counterintuitive argument to be made that aggregated or probabilistic measurement is going to give a more accurate picture of what's going on because it has a wider aperture."

DATA CLEAN ROOMS DELIVER PRIVACY AND INSIGHT

MMM is not the only part of measuring marketing effectiveness in a more privacy-focused world. To improve your picture of the target audience, there's a lot that can be done with first-party data, especially when you contrast it with someone else's first-party data. Publishers often have ad exposure information linked to specific identity, such as in the case of streaming services. And advertisers typically have first-party data about conversions and customer interactions. By combining their respective data sets, publishers and advertisers can measure important metrics like multi-touch attribution and sales lift. However, privacy concerns demand that they conduct this measurement in a secure and privacy-compliant manner, without directly sharing personal information.



The solution is a data clean room, a secure and controlled environment that allows multiple companies – or divisions of a company – to bring data together for joint analysis without directly sharing or exposing personal or sensitive information. Data from multiple parties can be matched and analyzed, and insights can be derived, while maintaining strict data privacy and security protocols.

Data clean rooms offer several advantages:

- **Enhanced view of marketing audiences:** By connecting data from different sources without exposing personally identifiable information, clean rooms provide a comprehensive and accurate view of marketing audiences, enabling better targeting and personalization, in a privacy-safe way.
- **Collaboration with media publishers:** Clean rooms facilitate collaboration between advertisers and leading media publishers, allowing them to offer more compelling and effective digital experiences by leveraging their combined data insights.
- **Privacy-preserving measurement:** Clean rooms enable the measurement of campaign effectiveness, reach and frequency while preserving user privacy by keeping sensitive data separate and secure.

Data clean rooms are becoming an increasingly popular solution for advertisers, publishers and technology platforms. The privacy-preserving collaboration they facilitate can give marketers useful data collaboration and measurement while maintaining strict privacy standards, delivering valuable insights to optimize their marketing efforts, while allowing them to live up to a commitment to consumers to demonstrate responsible data practices.

THE EMERGENCE OF CLEAN ROOM INTEROPERABILITY

While clean rooms are great at facilitating data collaboration, working across multiple cloud platforms or data formats has been a problem. The industry is actively exploring how clean rooms can overcome the challenge to eliminate the barriers caused by multiple platforms or irreconcilable identifiers, schemas or taxonomies.

Companies that offer market-prominent data clean room applications, as well as cloud providers with data clean room offerings like AWS, are helping pioneer efforts to bridge these gaps, enabling marketers to harness comprehensive datasets for more precise targeting and strategic decision-making. This evolution not only promotes regulatory compliance and data governance, it also fosters a culture of innovation where organizations can leverage interconnected intelligence securely and efficiently.

As the clean room ecosystem continues to evolve, the focus on interoperability will drive new standards in data collaboration.



4. THE INCREASED VALUE OF FIRST-PARTY DATA

For years, Google promised it was doing away with the third-party cookie in the Chrome browser. It kept pushing back the expiration date, though — as far as 2025 — until the search/ad giant reversed course this summer. The new news is that the third-party cookie has not crumbled, but at the same time, Google's suite of replacement tools — the toys in its Privacy Sandbox — [will also continue](#).

Most marketers will breathe a sigh of relief to know that the cookie jar isn't empty, but having spent years trying to think past the third-party tracker, they've come to understand that there are other, perhaps more powerful options.

One outcome of the shift from reliance purely on the third-party cookie is an increased focus on first-party data. This is having a number of effects, including fueling the buzz around commerce media (which we'll address a few pages from now).

"Cookies are still with us, but a future enhanced by first-party data is much more promising."

Scott Brinker says first-party data is a different and still underappreciated animal. It's a question of shifting leverage, he says.

"The third-party-cookie-based world gave marketers leverage at the top of the funnel, reaching people on other properties," he says. But he points out that if you could eke out a single-digit conversion rate on a cookie-based campaign, you called it a win. "Sub 1% was often the average. Those campaigns were easy to run, but they rarely delivered remarkable performance."

What's far more exciting, he says, is the behavioral insights that can be drawn from first-party data. "Now companies are starting to better instrument their own digital properties. You see when people visit your website, web app or mobile app and gain tremendous insight into their behaviors. When people connect with us through a digital channel, what do they do? How do they engage? Where do they fall off? What brings them back?"

It's not that marketers are replacing what third-party cookies provide — they no longer have to. Rather, B2B marketers in particular are shifting their attention beyond upstream channels.

"They're starting to realize the incredible downstream data and leverage that they have," he says. But there's a catch. "Most companies just haven't done much of this before. We've spent two decades developing the playbook around third-party cookies. First-party data is requiring a lot of reinvention."

That reinvention requires new tools and approaches, and careful attention to privacy and opt-in/opt-out choices. But Brinker says it all starts with an old standby: a clear, detailed customer journey map.

"When you do a detailed customer journey map, you realize that meaningful interactions happening outside of your owned customer experience are actually relatively limited," he says. "Many more valuable interactions happen in your own domain. And this is where AI gets really exciting. In the past, even if we had all this rich, first-party data, we'd be buried under the volume. AI technologies will get better and better at helping us tune into the signal in that noise."



5. THE RISE OF COMMERCE MEDIA

If there was one Hot New Thing in marketing, well, there is, and it's AI. But if there were two Hot New Things, the second one would be commerce media. Commerce media – the maximal update of retail media – took off in the vaccine era, gaining popularity in the past two years. It's the broad, expansive successor to retail media, which took off in the late 2010s and further accelerated during the COVID-19 pandemic.

Retail media is a simple concept. A retailer needs two basic ingredients: Data that is of value to brands other than itself and its competitors, and a place to show ads, such as a website or mobile app. Retail media allows brands to reach consumers on an ecommerce site, near the point of purchase, and can include display ads, videos and sponsored search results. Thus, sponsored listings at the top of your Amazon search, and context-relevant ads on websites for [Walmart](#), [Target](#), [Family Dollar](#), [Kroger](#) and a host of other retailers. The retailer is using its first-party data for targeting and measurement, all within its closed-loop ecosystem.

Retail media has been driven by the surging popularity of ecommerce, especially at the height of the pandemic, and by years spent contemplating the need to replace third-party cookie strategies. It offers privacy-safe collaboration.

But this opportunity is not limited to retail. The travel industry, hotels, telecom companies and more all have highly valuable customer data about audiences that advertisers are eager to reach. Commerce media brings the principles of retail media to pretty much any place that has an audience and isn't already running ads – the seat-back screen you watch

for your entire flight; the ride-hailing app you stare at while a car inches block by block toward you. Using targeted advertising based on the first-person data owned by the platform, it tries to offer consumers things they want, when they're likely to be in a mood to buy them— or at least welcome a little distraction.

Current examples of commerce media include [Walmart Connect](#), which is expanding its retail media offering beyond its [walmart.com](#) domain; [Best Buy Ads](#), a retail media offering that extends to third-party publishers; and [Instacart Ads](#) and [Uber Journey Ads](#), which offer promotions while users are engaged with their apps. Recently, [United Airlines](#), [Costco](#), [Marriott](#), [PayPal](#), [Chase](#) and [Expedia](#) have all announced ad platforms that will target ads using their voluminous consumer data.

All signs point to a growing trend, and with good reason. For many industries, notably retail, profit margins are fairly slim. But the margins on digital ads are excellent (a [MarTech.org article](#) compares typical retail margins of 3-4% to retail media margins of 70-90%), and the connection of platform and advertiser provides rich targeting without the third-party data concerns. Overcoming privacy challenges is often done using data clean rooms, so again we see trends weaving together and amplifying each other.

And finally, the demand for advertising space is outpacing the availability of owned and operated inventory, creating a ripe opportunity for new entrants to the commerce media space.

The background features a light blue gradient with three large, semi-transparent white curved shapes that overlap each other.

03

**POSTCARD FROM
THE EDGE**



CHAPTER 03

POSTCARD FROM THE EDGE

It never ends, this business of predicting the future. There are always new trends in the marketing world, and in the martech space in particular. It's important to keep up with them, but any given marketer or marketing org need not respond to every incremental change in the marketing landscape. This report surveys both tectonic shifts that fundamentally and permanently alter the marketing ecosystem, and the most significant trends driven by this new normal.

In the following pages, we lay out some key effects of the trends discussed here by detailing the structure of the new modern marketing data stack. We identify the vendors who are gaining the most traction in their segments of the stack as marketers worldwide work within the Snowflake AI Data Cloud. We'll provide examples of success stories and capabilities that our unified data approach offers. In all, we hope you'll come away with some new ideas that will lead to success for your own organization.

Perhaps the most interesting of the fundamental shifts is the arrival of advanced AI, simply because there's so much yet to be determined. "More privacy restrictions" and "unified data" are challenging ideas to act upon, but they're also pretty clear concepts. The applications and implications of generative AI and related advances are harder to predict, especially beyond the next year or three.

We'll close this section with our favorite speculative, edge-of-the-horizon prediction from this year's research. Scott Brinker sees an

underappreciated AI implication on the horizon, though he can't predict when it will be a factor: "Our discussions about the power of AI today are mostly on the seller side, about empowering marketers," he notes. "At some point, buyers will have their own AI agents. What happens in a world where the interaction isn't just with human buyers but with AI buyers, too?"

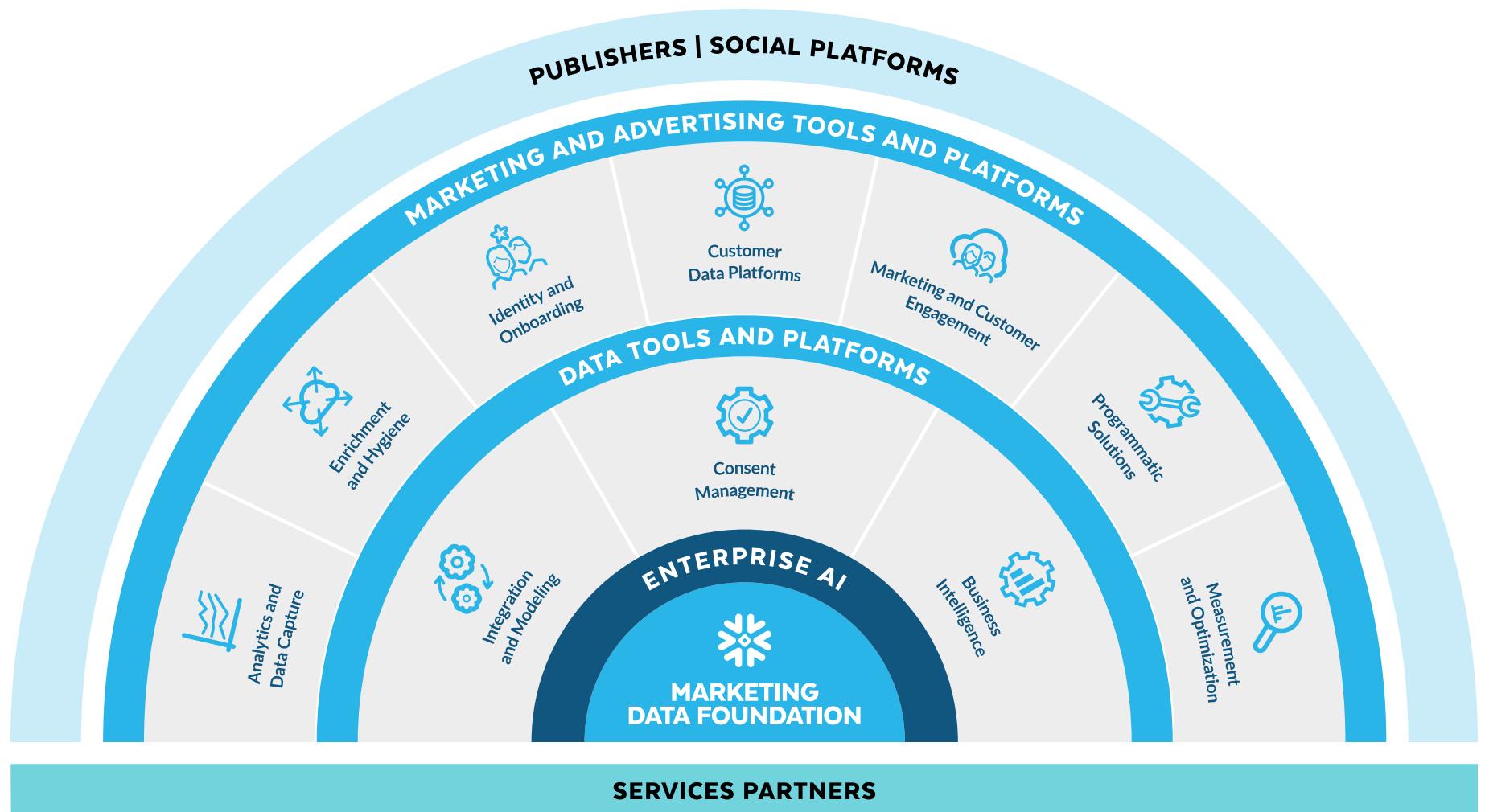
In other words, we'll have shifted from humans figuring out how to market to humans, to AIs figuring out how to market to humans, to AIs figuring out how to market to another AI. When a person is in the market for a new pair of noise-canceling headphones or the best gift options for Mother's Day, they'll ask their AI agent for a short list of options. The job of the marketing AI will be to figure out how to make it to the top of the consumer AI's recommendation list.

That will be covered in a future edition of the Modern Marketing Data Stack report. We'll have our AI assistant write it so that yours can crunch it down to a meme-able quote for you.

04

THE MODERN MARKETING DATA STACK IN 2025





Last year we wrote about the convergence of adtech and martech, an ongoing and irreversible trend. This convergence — driven in large part by the rising importance of first-party data and the evolution of data infrastructure — benefits the entire ecosystem and creates avenues to capitalize on the immeasurable AI opportunity that lies ahead.

The modern marketing data stack enables marketers to capitalize on this convergence. It helps ad sellers maximize the value of their inventory by making it easier for ad buyers to reach their desired audiences more effectively and cost-efficiently, and the ad buyers — the marketers themselves — are major winners of the new paradigm. They can easily work across their full ecosystem, as well as on the publisher and social platforms that effectively help their ads reach their desired audiences.



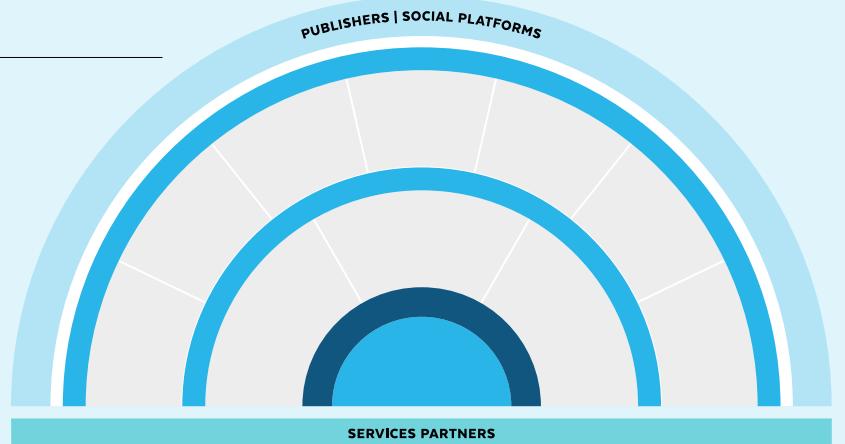
While the stack itself is made up of marketing and advertising solutions along with the underlying data/AI technologies – both of which we will break down in further detail below – there are two other significant aspects to consider, represented in adjunct sections surrounding the stack itself:

1. PUBLISHERS AND SOCIAL PLATFORMS

Publishers, streamers and social platforms serve ads to connect marketers with their target audiences, leveraging vast user bases and broad inventory to reach potential customers effectively and drive revenue through advertising.

2. SERVICES

For many organizations, particularly those with more complex or ambitious deployments, a trusted services partner is an essential part of establishing a modern marketing data stack. In addition to implementation support, services partners also contribute with solutions that serve marketers' business needs throughout different stack categories.



SERVICES PARTNERS DELIVERING MARKETING SOLUTIONS ON SNOWFLAKE

Atrium

[Ad Sales Optimization with Campaign 360](#)

DAS42

[Subscriber Analytics](#)

Kipi.ai

[Kipi Marketing Mix](#)
[Modeling and Analytics App](#)

BlueCloud

[BlueCasual + BlueInsights](#)

Hakkoda

[Zero to CDP](#)

Squadron Data

[Squadron Enhanced C360](#)



These two categories are not part of the tech stack itself, but are a valuable and essential part of the ecosystem and serve data-forward marketers.

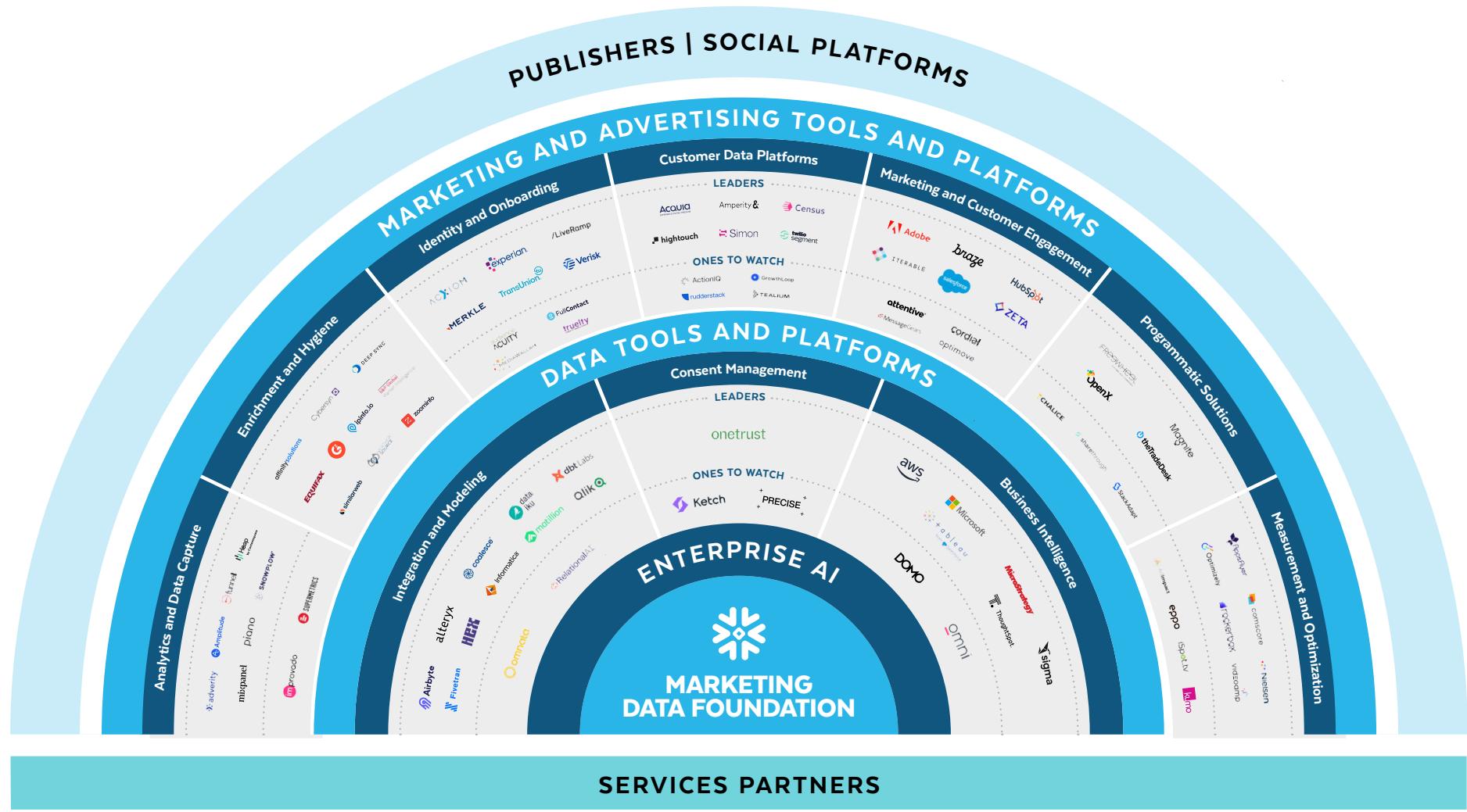
Turning to the marketing data stack itself, a key revision from last year's report is that its shape abandons the literal "stack" metaphor in favor of concentric layers that penetrate from a surface down to a core. This indicates that what we see on the surface — the right message delivered to the right audience at the right moment — has a layer of marketing technology underneath it, and a diffuse, permeating layer of enterprise AI and foundational data technology beneath that, serving as the foundation for all marketing and advertising use cases. Its resemblance to a cross-section of a planet, with the data foundation at its core, complements our point about the increasing primacy of data gravity.

Our experience with partners and customers currently using the AI Data Cloud has demonstrated that this revised perception of the modern marketing data stack is accurate to today's marketing orgs, and for the foreseeable future.





THE MODERN MARKETING DATA STACK 2025





POPULATING THE STACK

So that's the stack and its various components. Now let's talk about the technology providers who deliver the individual capabilities that allow marketers to thrive. Just as the Snowflake platform is a microcosm of the cloud market writ large, so too these marketing technology partners provide a perspective on how marketing solutions are being consumed worldwide.

To identify leading providers among the marketing technologies on the Snowflake platform, we looked at multiple factors — including customer adoption patterns, the number of customers using a given technology, and consumption levels — to identify the most integral solutions. We also identified Ones to Watch, providers that show impressive uptake on the platform and that have the potential to become leaders themselves. We used such qualitative aspects as innovative and differentiated offerings, recent adoption/usage momentum and innovative roadmaps that focus on addressing marketers' core challenges.

Each of these companies is embracing the changing dynamics within the marketing and advertising space, taking advantage of technology advancements around AI, incorporating new imperatives around privacy, and more. In the pages that follow, we'll walk through each section of the stack in order.

THE 3 SNOWFLAKE-SPECIFIC CAPABILITIES

These icons designate three key capabilities for marketers that certain organizations within the modern marketing data stack possess, based on their Snowflake product usage and existing integrations.



REAL-TIME ENABLED

Refers to organizations within the modern marketing data stack, either Leaders or Ones to Watch, that use a minimum of 40 consumption credits between May 1, 2023, and April 30, 2024 (roughly three per month), of Snowpipe Streaming and/or Dynamic Tables usage. This designation does not encompass all partners offering real-time services, as some may not meet the criteria as defined for this report.



AI-READY

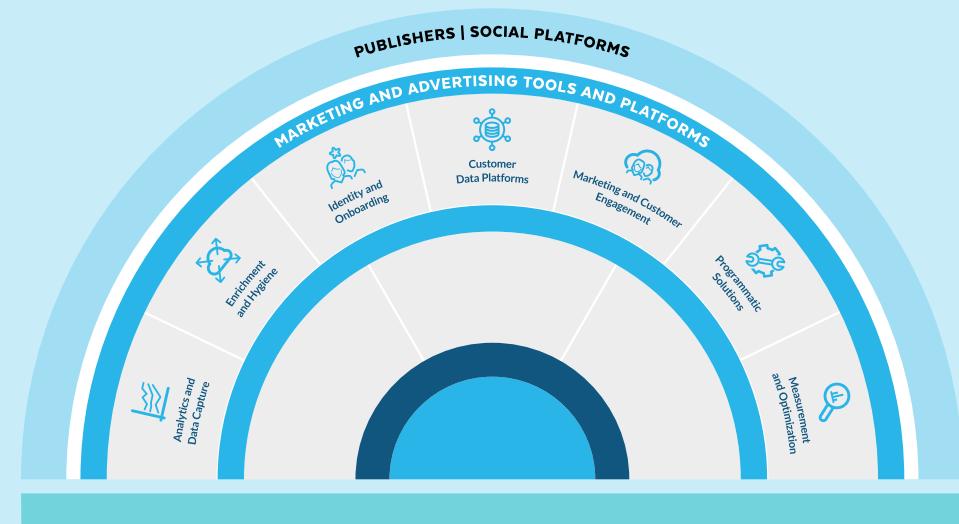
Partners within the modern marketing data stack, either Leaders or Ones to Watch, that have a minimum consumption of 40 credits, between May 1, 2023, and April 30, 2024 (approximately three per month), across Cortex LLM, Cortex AI, Machine Learning Credits or Unmanaged ML Packages.

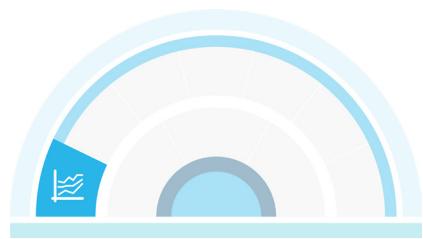


SNOWFLAKE NATIVE APP

Partners that have a Snowflake Native App, either privately available, publicly listed or jointly announced, at the time of the report launch.

MARKETING- AND ADVERTISING-SPECIFIC TOOLS AND PLATFORMS





ANALYTICS AND DATA CAPTURE

Analytics and data capture encompasses tools and platforms designed to collect, process and analyze data related to user behavior, marketing performance and business metrics. These platforms provide insights into how users interact with digital properties so organizations can make data-driven decisions, optimize marketing strategies and enhance user experiences.

LEADERS

ADVERTITY

Adverity is an integrated data platform that automates the collection, governance and management of data, providing marketing teams with a single organized view of performance.

AMPLITUDE

Amplitude is a digital analytics platform leveraging user-based behavioral reports and AI automation so marketers can act on data and understand the full user journey.

FUNNEL

Funnel's data hub manages connections to thousands of sources, securely stores data and allows marketers to quickly model data to turn complexity into clarity.

HEAP BY CONTENTSQUARE

Heap by Contentsquare provides a digital analytics platform to track customers' entire digital journeys, aggregating and integrating quantitative and qualitative data so marketers can improve conversion, retention and customer satisfaction.

MIXPANEL

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

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

SNOWPLOW

Snowplow allows analytics, data science, product and marketing teams to collect, manage and operationalize rich, first-party customer behavioral data to fuel advanced data-driven use cases – directly from the Snowflake AI Data Cloud.

ONES TO WATCH

IMPROVADO

Improvado's marketing analytics platform automates data integration and harmonization, delivering reliable, centralized analytics to power insight-driven campaign management.

SUPERMETRICS

Supermetrics pulls and unifies granular marketing and sales data from over 150 platforms into an organization's preferred reporting and analytics destinations.

KEY:



Real-time Enabled



AI-ready



Snowflake Native App



ENRICHMENT AND HYGIENE

Enrichment and hygiene technologies let businesses enhance their unified customer/user data with external data sets to paint a more precise and holistic picture. Enrichment providers can add such high-value attributes as demographics, behavioral patterns or interests. They aggregate third-party data sources, social media data, weather data and more. The deepened understanding of a target audience — as well as the context that campaigns are executed on — helps marketers to improve engagement, conversion rates, customer satisfaction, brand loyalty and ad spend.

LEADERS

AFFINITY SOLUTIONS

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.

CYBERSYN

Cybersyn provides granular, analytics-ready third-party data via Snowflake Marketplace that give businesses deeper insights into their competitors and the economy.

DEEP SYNC

Deep Sync offers comprehensive audience insights and deterministic identity data sets, facilitating precise audience targeting across online and offline marketing channels.

EQUIFAX

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

G2

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

IPINFO

IPInfo curates IP geolocation, company, carrier and IP type data sets to aid marketing teams in IP-based personalization, enriching raw data with insights from anonymous web traffic.

S&P GLOBAL MARKET INTELLIGENCE

S&P Global Market Intelligence provides financial and alternative datasets to enable informed decision-making across financial, commerce and economic sectors.

SIMILARWEB

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

WEATHER SOURCE

Weather Source enriches marketing data with high-resolution weather and climate data from globally distributed grid points, enabling marketing teams to align messaging with weather conditions.

ZOOMINFO

ZoomInfo helps businesses find, acquire and grow customers by delivering accurate, near real-time data, insights and technology to more than 35,000 companies worldwide.

KEY:



Real-time Enabled



AI-ready



Snowflake Native App



IDENTITY AND ONBOARDING

Identity and onboarding tools and platforms facilitate seamless integration and activation of customer identities across various channels and devices. By resolving identities across offline and online interactions, marketers can ensure accuracy and consistency in customer profiles and enable precise targeting. Onboarding is the process of transferring identity data to a third-party advertising platform, “activating” the data to determine who sees an ad campaign. This improves campaign personalization and measurement by connecting an advertiser’s message to that unified, persistent identity.

LEADERS

ACXIOM



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



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.

LIVERAMP



LiveRamp's identity resolution and transcoding solution, delivered as a Snowflake Native App, helps brands onboard, identify, connect, unify, control and activate data across different channels and devices to optimize marketing efforts.

MERKLE



Merkle leverages Merkury for Enterprise, a proprietary suite of products underpinned by Merkury, dentsu's global identity, data and insights platform, to provide clients with unique person-based identity growth, ownership, consumer data enhancement and connectivity.

TRANSUNION



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

VERISK MARKETING SOLUTIONS



Verisk Marketing Solutions 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

AUDIENCE ACUITY



Audience Acuity's identity graph enables firms to identify and contextually interact with audiences across channels and devices.

FULLCONTACT



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.

MEDIAWALLAH



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

TRUELTY

TrueLty's identity resolution capabilities deduplicate customer data directly within Snowflake, allowing marketing teams to consolidate data from all channels and generate a singular perspective on customers.

KEY:



Real-time Enabled



AI-ready



Snowflake Native App



CUSTOMER DATA PLATFORMS

Customer data platforms (CDPs) include reverse ETL providers and CDPs that are integrated natively in the cloud. These platforms are designed to make data available to operational marketing tools faster and easier. Activating customer and marketing data means taking audience data, creating relevant segments and audiences, and bringing it to platforms that help marketers deliver their message to their chosen audiences.

LEADERS

ACQUIA

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

AMPERITY

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.

CENSUS

Census is a data activation platform built on Snowflake which empowers marketers to build dynamic audiences with a no-code segment builder and activate customer data to over 200 business tools with reverse ETL.

HIGHTOUCH

Hightouch is a composable customer data platform that enables teams to collect, prepare and sync customer data from the Snowflake AI Data Cloud into the tools your business teams use, including ad platforms, CRMs and email tools.

SIMON DATA

Simon Data is a customer data platform that unifies customer data from the Snowflake AI Data Cloud with additional sources to power faster, more precise segmentation and personalization.

TWILIO SEGMENT

Twilio Segment helps data teams bring together customer data from multiple sources to prepare, enrich and activate from the Snowflake AI Data Cloud, empowering marketing teams with real-time insights to deliver personalized customer engagement.

ONES TO WATCH

ACTIONIQ

ActionIQ is a hybrid composable customer data platform that connects to the AI Data Cloud to provide audience segmentation at scale, customer journeys and data streaming personalization.

GROWTHLOOP

GrowthLoop's composable CDP empowers nontechnical business users to build intelligent customer segments on Snowflake and activate directly to marketing and sales destinations with no SQL required.

RUDDERSTACK

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

TEALIUM

Tealium enables businesses to unify and leverage customer data across various platforms and channels, enhancing data value, actionability, compliance and security.



MARKETING AND CUSTOMER ENGAGEMENT

This category encompasses marketing clouds, as well as customer engagement platforms and tools that orchestrate comprehensive marketing strategies by integrating diverse customer data for personalized campaigns across email, social media, mobile and web. The tools in this category enhance marketing efforts with personalized messaging and lifecycle management, facilitating smooth communication, tracking customer behaviors/preferences, and delivering well-targeted offers – helping marketers build stronger relationships with their audiences.

LEADERS

ADOBE

Adobe Experience Cloud integrates analytics, advertising, content management and personalization tools to create and manage data-driven digital experiences to foster continuous engagement with customers.

BRAZE

Braze is a customer engagement platform that allows brands to unify customer data, build comprehensive customer profiles, and activate to the right audiences and platforms.

HUBSPOT

HubSpot is a customer platform that drives connection across the buyer journey for marketing, sales and customer service teams.

ITERABLE

Iterable is an AI-powered, cross-channel communication platform that orchestrates individualized, harmonized and dynamic customer experiences by closing the activation gap.

Salesforce

Salesforce is a cloud-based CRM software that unifies customer data and offers apps for sales, service, marketing, commerce and more on one integrated platform.

ZETA

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

ONES TO WATCH

ATTENTIVE

Attentive enables brands to connect with mobile audiences throughout the customer journey through personalized SMS and email based on engagement data and comprehensive customer profiles.

CORDIAL

Cordial automates personalized, data-driven messaging across email, SMS, mobile apps and more, helping brands achieve scalable revenue growth and deepen customer connections through orchestrated campaigns.

MESSAGEGEARS

MessageGears' marketing solution connects directly to the AI Data Cloud, providing audience segmentation, cross-channel message creation and delivery, and real-time data availability.

OPTIMOVE

Optimove enables marketers to orchestrate multi-channel communications at scale using its real-time decisioning engine, combining customizable messaging strategies with native CRM channels like email, mobile push notifications and web pop-ups.

KEY:



Real-time Enabled



AI-ready



Snowflake Native App



PROGRAMMATIC SOLUTIONS

This category includes demand-side platforms (DSP), supply-side platforms (SSP), ad exchanges, ad servers and other programmatic tools. 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 connects SSPs and DSPs 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

FREEWHEEL



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

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

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

THE TRADE DESK

The Trade Desk is an omni-channel advertising platform for advertisers and agencies to leverage data to buy media on the open internet at every stage of the funnel.

ONES TO WATCH

CHALICE

Chalice enables brands to harness AI directly by building custom algorithms trained on their own data, optimizing outcomes with integrations with preferred measurement and data partners.

SHARETHROUGH

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

STACKADAPT



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

KEY:

Real-time Enabled



AI-ready



Snowflake Native App



MEASUREMENT AND OPTIMIZATION

Measurement and optimization technologies provide a comprehensive understanding of investments across all channels, using high-quality data to assess the impact of a full campaign down to a granular level. Having evolved well past inefficient manual processes, modern measurement tools can algorithmically create, monitor and optimize media plans, then run attribution models on the executed campaign. The resulting recommendations help marketers further maximize outcomes within budgets and other constraints.

LEADERS

APPFSFLYER

Appsflyer provides measurement, analytics, engagement and fraud protection technologies that enable marketers to measure success.

COMSCORE

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

NIELSEN

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

OPTIMIZELY

Optimizely is a digital experience platform that enables digital optimization with integrated testing, robust analytics, and data integrations with customer data platforms.

ROCKERBOX

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

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

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.

EPPO

Eppo enables advanced warehouse-native A/B testing with rigorous statistical analysis and automation of experiment processes, including feature flags and dynamic configurations.

iSPOT

iSpot unifies advertising measurement across creative, audience and outcomes to drive optimal TV and video campaign performance.

KUMO

Kumo harnesses graph learning techniques to empower marketers with predictive models and AI-powered insights, using a SQL-like interface that enhances personalization and recommendation capabilities.

KEY:



Real-time Enabled

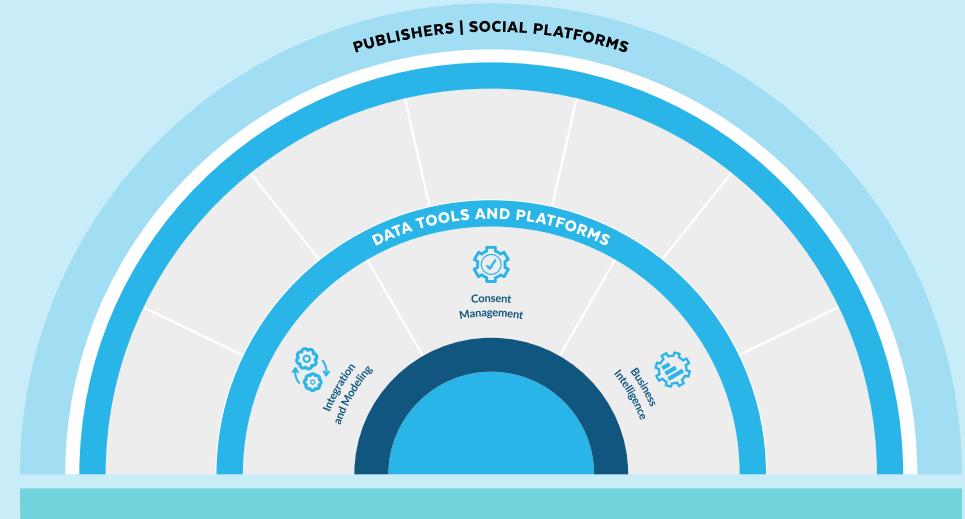


AI-ready



Snowflake Native App

DATA TOOLS AND PLATFORMS





INTEGRATION AND MODELING

These technologies and tools process 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 encompasses technology providers specializing in data transformation – the process of changing the format, structure or values of data to make it more organized and useful to humans and computers – as well as data science platforms that allow users to build, deploy and manage data and AI projects.

LEADERS

AIRBYTE

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

ALTERYX

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.

COALESCE

Coalesce accelerates data transformations in Snowflake through intuitive visual tools, automating complex processes and empowering teams to collaborate effectively on scalable data pipelines.

DATAIKU

Dataiku is a universal AI platform, uniting the technology, teams and operations needed for companies to build intelligence into their daily operations, from modern analytics to gen AI.

DBT LABS

dbt Labs 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

Fivetran empowers customers to harness their data to power everything from AI applications and ML models, to predictive analytics and operational workloads.

HEX

Hex is a complete workspace for analytics and data science that brings exploratory analysis, operational reporting and self-serve together so data teams can rapidly answer questions and empower stakeholders with data.

INFORMATICA

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

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.

QLIK

Qlik is an AI-powered analytics platform that enables users of all skill levels to securely integrate, analyze and derive actionable insights from multiple data sources.

KEY:



Real-time Enabled



AI-ready



Snowflake Native App



INTEGRATION AND MODELING (CONTINUED)

These technologies and tools process 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 encompasses technology providers specializing in data transformation – the process of changing the format, structure or values of data to make it more organized and useful to humans and computers – as well as data science platforms that allow users to build, deploy and manage data and AI projects.

ONES TO WATCH

OMNATA

Omnata is a native app for Snowflake that streamlines data syncing without middleware, offering simplified deployment, enhanced security and cost efficiency by eliminating data-handling infrastructure.

RELATIONALAI

RelationalAI, a cloud-native knowledge graph coprocessor, provides integrated support for graph analytics, rule-based reasoning, prescriptive analytics and predictive analytics.



CONSENT MANAGEMENT

Consent management tools play a pivotal role in today's marketing landscape, particularly given heightened regulatory scrutiny and more restrictive privacy standards. These tools let marketers efficiently gather, manage and document user consent across various digital touchpoints. Using these tools to ensure compliance with stringent data protection regulations, organizations can build trust with their audiences by demonstrating transparency and respect for user privacy preferences.

LEADER

ONETRUST

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

ONES TO WATCH

KETCH

Ketch is a data permissioning platform that helps brands collect and mobilize permissioned data, with a connected set of apps, infrastructure and APIs.

PRECISE.AI

Precise.ai, previously Qonsent, is an AI-driven platform designed to enhance brand performance through high-quality, privacy-focused audience targeting, offering a suite of consumer engagement tools for data collection and a federated network for compliant data sharing and insights.

KEY:

Real-time Enabled



AI-ready



Snowflake Native App



BUSINESS INTELLIGENCE

BI tools analyze data and provide visualizations, reports and dashboards accessible across all organizational levels that enhance organizational decision-making capabilities. These insights enable marketing and other business units to grasp audience behavior and emerging trends, and to effectively assess marketing effectiveness across diverse channels.

LEADERS

AMAZON QUICKSIGHT



Amazon QuickSight is a unified BI service built for the cloud. With QuickSight, all users can meet varying analytic needs from the same source of truth through modern interactive dashboards, pixel-perfect reports, natural language queries with Amazon Q and embedded analytics.

MICROSOFT POWER BI



Microsoft Power BI, part of Microsoft Fabric, is a scalable platform for self-service and enterprise BI that's easy to use and helps users get data-driven insights.

MICROSTRATEGY



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.

SIGMA

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

Tableau is an AI-powered analytics platform that transforms reliable data into clear, actionable insights, enabling more informed decision-making across your organization.

THOUGHTSPOT



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

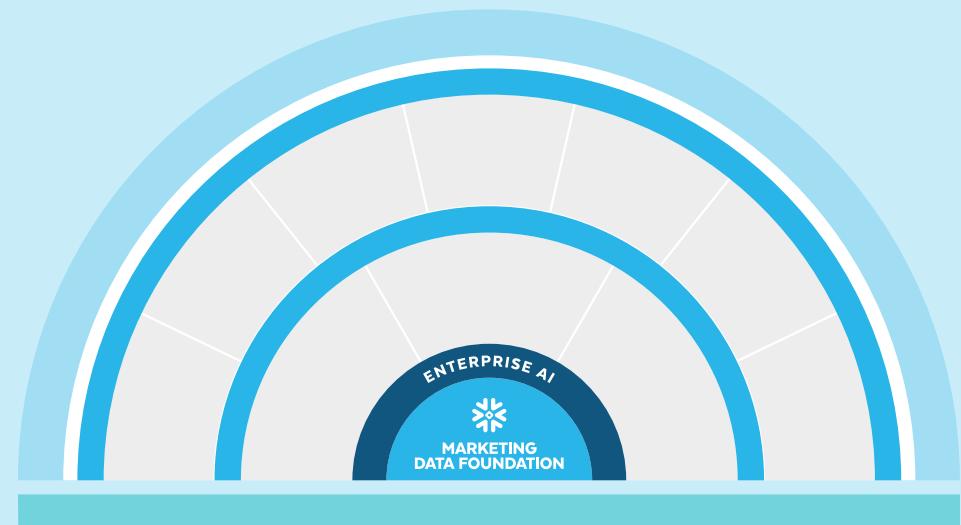


Domo is a low-code BI and analytics data application platform allowing organizations to connect, prepare, visualize and analyze data from various sources in real time.

OMNI

Omni provides BI capabilities by enabling users to build SQL data models, explore data through intuitive interfaces, create customizable visualizations and securely share insights across various platforms.

DATA FOUNDATION





DATA FOUNDATION

The data foundation is an enterprise's entire data estate. "Marketing data" such as customer data, marketing performance data, ad logs and sales data exists in a unified platform with data from finance, HR and more – a complete end-to-end view, all appropriately secured, governed and access-controlled. This unified perspective reveals new revenue opportunities and efficiencies.

ENTERPRISE AI

Enterprise AI, relying fundamentally on a unified data infrastructure, empowers data scientists, analysts and business leaders to extract profound insights from extensive datasets and automate inefficient tasks. The enterprise AI layer unveils critical trends and deploying predictive analytics, which helps businesses anticipate future outcomes with unparalleled accuracy. This category covers gen AI and ML capabilities that will let marketers shift their focus from technical mechanics to business optimization.





THE CORE OF THE MODERN MARKETING DATA STACK

After that dive into layers of stack categories, let's come back to the three fundamental shifts that define the new marketing normal – data gravity, generative AI and privacy – to see how leading marketers are not only adapting to the new normal, but leveraging it for success.

We were able to identify the key players in all the categories of the stack by doing what modern marketers do: analyzing customer data. By looking at what Snowflake customers are actually using for marketing, we can see which solutions have traction with real marketers driving real campaigns. And at the core of it all is the [AI Data Cloud for Marketing](#).





DATA GRAVITY

More and more organizations are eliminating data silos, unifying their data and attracting more data — as well as the applications that use it — and for good reason. Data is expensive to store and move, tricky to govern for both security and privacy, and complex to manage and mobilize for insights. Let's face it — however essential, data-driven marketing is far from simple.

The AI Data Cloud helps marketers simplify all that complexity by getting rid of data silos, reducing redundancies and unifying their data into a single source of truth. They can integrate all their customer, marketing and enterprise data, in any format, from internal and external sources, across channels, and in near real time. That includes seamlessly and instantly ingesting data from core marketing systems — like CRM systems, Google Analytics, Google Ads, Meta and LinkedIn — so marketers can work with critical data generated and collected by their current systems of choice within a single, secure and scalable data platform.

That data can then be unified with other business data to surface powerful insights and help marketers deliver differentiated campaigns and relevant experiences. With [streaming on Snowflake](#), they can also collect behavioral and event data in near real time, at a fraction of the cost they're used to, and leverage single-digit latency to deliver instant insights. When all this unified data is ingested and transformed in a single system, marketing teams have flexible and frictionless access to the full breadth of their diverse data sets, helping them realize value.

For Snowflake customers, the shift to data gravity is well underway. According to our research,² the two modern marketing data stack categories responsible for data ingestion (Integration and Modeling; and Analytics and Data Capture), are growing at a faster pace — 3 percentage points faster — than the stack overall. This shows us that marketers are still ingesting and collecting even higher volumes of data, actively working to eliminate data silos, and building their marketing data foundations for both customer and advertising data. While data unification has long been discussed, its achievement is iterative, not an end state, and we see marketers actively continue to work toward this goal.

Our research also suggests that the ecosystem is moving to the data, and not the other way around. Nearly one third of providers highlighted (30%) have a Snowflake Native App available for marketers to use today, with multiple others in the advanced building stage. The majority of those apps (62%) fall into the categories of identity and onboarding; enrichment and hygiene; and integration and modeling, which illustrates that organizations are building significant portions of their own customer 360 — where their data lives.

ORGANIZATIONS ARE BUILDING SIGNIFICANT PORTIONS OF THEIR OWN CUSTOMER 360 — WHERE THEIR DATA LIVES.

² Our research identified the technologies that have developed a significant, active customer base within Snowflake by analyzing more than 9,800 Snowflake customers within a 12-month period, from May 1, 2023, to April 30, 2024. (See the [Methodology](#) section in the Appendix for the full breakdown.)



GENERATIVE AI

What comes next is where the real magic happens. Generative AI is transforming how marketers build and understand their audiences, create, launch and measure campaigns, and how quickly and easily they can do it. While in the recent past AI capabilities were left to specific tools and stack categories, today AI permeates the stack and is enabled by the native capabilities that reside within the data platform. To capitalize on the future of marketing, organizations need a strong data foundation with native AI capabilities.

After dedicating time and resources to build a robust and unified marketing data foundation, the last thing a marketer wants to do is silo their data in order to run enterprise-grade AI. With [Snowflake Cortex](#) – a fully managed service that unlocks AI and ML tools directly within the AI Data Cloud – marketers can take full advantage of gen AI and LLMs. Imagine the ability to easily access AI apps that enable faster and more accurate segmentation, prescriptive campaign recommendations, cutting-edge attribution, campaign measurement and new ways to personalize customer experiences – all in one, easy-to-use package. And the data never leaves the secure and governed perimeter.

Cortex is a game-changer for marketers. It democratizes gen AI, making it accessible to everyone, regardless of technical expertise. Marketers can use Cortex-built applications to talk with their data directly, in their natural language, without having to rely on lengthy processes and specific skill sets of data engineers and data scientists to translate. They can personalize marketing content by analyzing customer preferences and purchase histories using Document AI, allowing for effective engagement. And they can gather customer sentiment by assessing hundreds of forums, review sites or even social media posts and then comparing them against competitors – all in a matter of minutes. Organizations can also leverage data science with Snowflake Copilot to accelerate insights and improve productivity with universal search.

CORTEX IS A GAME-CHANGER FOR MARKETERS. IT DEMOCRATIZES GEN AI, MAKING IT ACCESSIBLE TO EVERYONE, REGARDLESS OF TECHNICAL EXPERTISE.



PRIVACY (AND COLLABORATION)

Underlying it all, privacy, governance and security are paramount. That's always been the case, but now it's even more important, and without the right tooling, it's even more challenging to navigate. Customers want their privacy protected, but they also expect marketers to deliver what they want, when they want it, in an era defined by signal loss. Today's marketers must adhere to regulations and meticulously arbitrate signals of consumer choice, preference and expectation.

The AI Data Cloud helps organizations maintain the highest levels of governance and privacy protection while also making it easier to share and collaborate with data — securely, without having to copy or move it. With built-in governance, marketers can secure data and streamline customer consent management. The number of customers using consent management tools on Snowflake increased 53% in the past year, which supports the category's growing relevance for marketers. And we expect that will only increase now that Google has backtracked on their [cookie deprecation](#) plans and will instead give users the option to opt out through a new choice mechanism. To quickly and effectively react to changing consumer preferences, marketers will need a unified data strategy with sophisticated consent management tooling to evade paralyzing regulatory fines.

Our research also points to the rise of data sharing and collaboration. Stable edges,³ which represent ongoing data relationships between providers and consumers, grew by 63.9% among organizations in the modern marketing data stack over the past 12 months compared to the previous year. Data sharing and collaboration are now mainstream and the ecosystem is not willing to go back to a world riddled by data

³ 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).

movement and copies. Importantly, marketers can leverage quality data in Snowflake to enrich their first-party data to refine audiences and campaigns with [Snowflake Marketplace](#), which contains more than 2,800 live, ready-to-use data, apps and AI products from more than 630 providers (as of July 31, 2024).

When it comes to helping marketers navigate the existing tension between privacy and collaboration, [Snowflake Data Clean Rooms](#) is the icing on the cake, offering a robust solution that empowers them to conduct detailed analyses on combined datasets without exposing sensitive data. Natively available in Snowflake, with no additional licensing fees, data clean rooms enable marketers to perform audience overlap assessments, activate targeted campaigns, conduct look-alike modeling, and measure campaign attribution or optimize reach and frequency.

The platform's native support for complex data joins and transformations, alongside seamless integration with leading adtech and martech ecosystems — many of which are highlighted in the modern marketing data stack — help advertisers maximize return on ad spend (ROAS), without compromising security or control.

THE NUMBER OF CUSTOMERS USING CONSENT MANAGEMENT TOOLS ON SNOWFLAKE INCREASED 53% IN THE PAST YEAR.

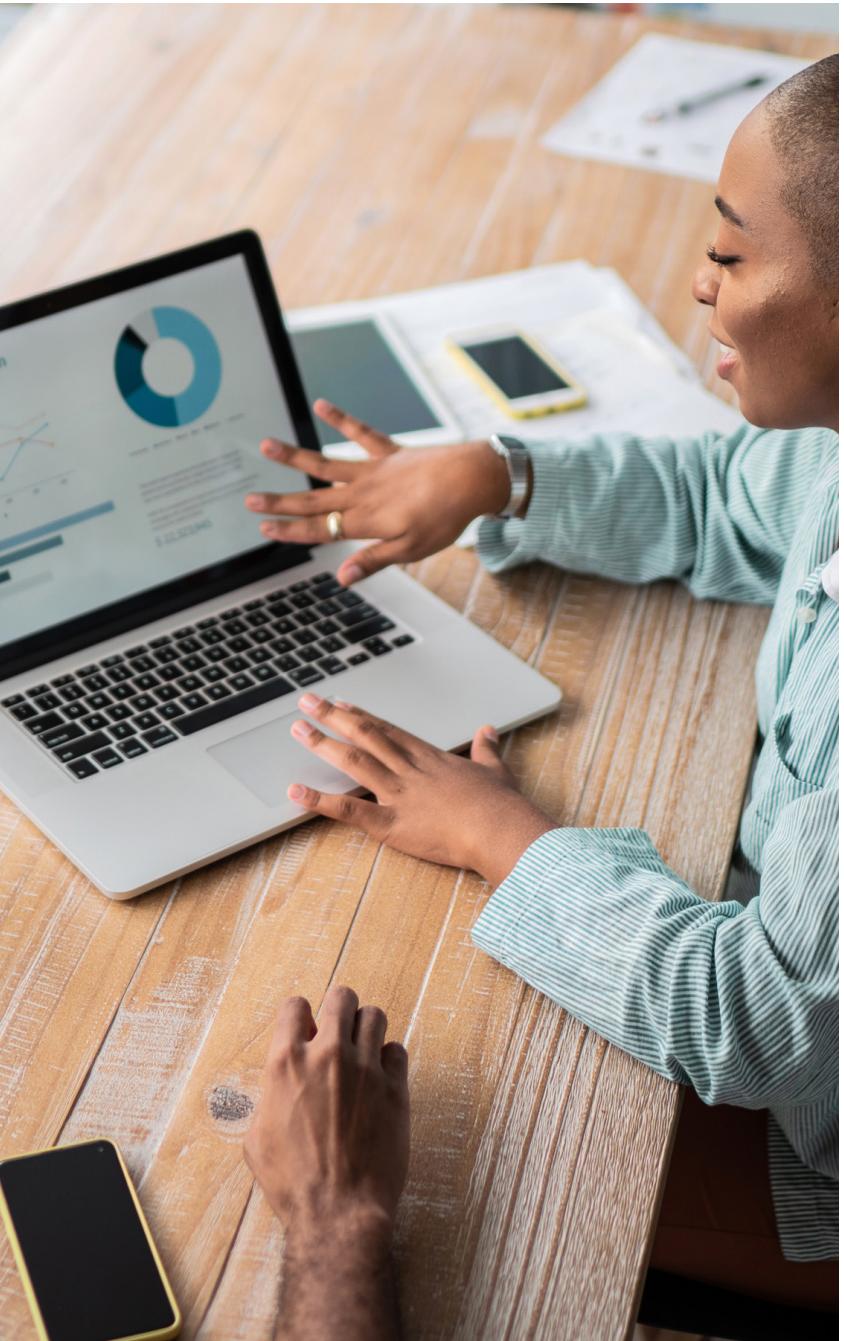


MARKETING IN THE AGE OF GEN AI: A SNAPSHOT OF FIVE INDUSTRIES

Within the context of this report's broad view of marketing trends and technologies, it's worth a closer look at how certain trends and factors are playing out in specific industries. The marketing landscape is changing at light speed, and while factors like privacy, data gravity and the impact of gen AI affect industries across the board in some way or another, when it comes to the modern marketing data stack, one size doesn't fit all.

In this section, we'll consider how market forces and evolving technologies are shaping the modern marketing data stack across five key industries.





FINANCIAL SERVICES

Being boring used to be considered an asset in banking and insurance. Not anymore. Fierce competition from more agile fintech upstarts and payment processing providers is forcing financial services firms to level up their marketing game. Advancements in secure and privacy-enhancing API technologies have allowed embedded finance to flourish at nonbanking companies, disrupting areas like insurance and investing. On top of that, fewer than half of retail bank customers are certain they'll be with their current institution in a year, while one in seven is actively looking to switch. That puts intense pressure on traditional firms to deliver the personalized services and innovative offerings that increasingly digital-savvy customers crave, but in a way that's both privacy-first and regulation-compliant. AI holds promise to help cut operational costs and bring the next wave of differentiation — if financial institutions can actually implement the AI strategies they've been talking about.



With all these factors in play, financial services marketers are working harder to bring in new customers — and keep them engaged — with an ultra-personalized customer journey, one both refined by generative AI and protected from its risks. Old-school marketing was all about presentation. The future is all about having meaningful conversations with customers. To hold up their end of the conversation, marketers need a 360-degree view of the customer from a single place that's not only primed for analysis and AI, but also makes it easy to manage all aspects of compliance and security, as endpoints and messages proliferate. Here are three key trends we're seeing in financial services marketing:

- **A personal touch, but make it digital.** Few of us walk into a branch office to deposit a check or apply for a loan anymore, but we still want to feel a personal connection to the institutions that are minding our money. Financial firms can lean into their trove of first-party data and AI to spot trends and focus on specific audience segments without compromising customer privacy. “Relational connection is among the most significant goals driving financial services institutions in a fight for consumer attention,” says Eddie Drake, Industry Lead for Financial Services Marketing and Advertising at Snowflake.

- **A holistic view of financial wellbeing.** Analytics-driven personalization can offer a broader view of a customer’s finances, allowing for something akin to a white-glove banking experience for everyone. For example, an AI agent might detect when customers appear to be shopping for home loans and offer advice on how to maintain a good credit score. Shifting from product-led marketing to person-led offers can increase the consumption of banking services while boosting loyalty.
- **Generative AI is on the (gradual) rise.** Intelligent chatbots will allow marketers to ask more questions of their data and create a more bespoke customer experience, but banks are proceeding cautiously, notes Drake. Today, most financial firms are still in the early stages of internal experimentation. “As more protections, safety and governance are in place, we’ll see experimentation shift to scalable business practice with clients and prospects,” he adds.

“

Relational connection is among the most significant goals driving financial services institutions in a fight for consumer attention.”



EDDIE DRAKE

*Industry Principal, Marketing and Advertising,
Snowflake*



HEALTHCARE AND LIFE SCIENCES

Each year, the cost of delivering healthcare increases, yet the margins that care providers can demand are not keeping pace. Similarly, life sciences companies face rising costs for R&D while under increasing pressure to hold the line on the cost of prescription drugs and other treatments. There's an urgent need for healthcare organizations to improve margins while maintaining high standards for care delivery and for life sciences companies to bring in more revenue. In a complex landscape where financial pressures, regulatory demands and shifting patient expectations intersect, every opportunity to increase efficiency is crucial.



And marketing lives at that crucial intersection. As healthcare options continue to evolve with remote patient engagement, new treatments and drug innovations, the role of healthcare and life sciences marketers becomes increasingly pivotal. Today's patient journeys are delivered through an intricate web of touchpoints both online and off, with everything from ads to office calls. In this changing landscape, healthcare and life sciences organizations need to assess how their technology can work for them. Looking at high-level trends, these four stand out:

- **Marketing and AI can improve patient care.** As hospitals and clinics shift to value-based care models, understanding the needs and potential outcomes of individual patients is becoming a prerequisite for effectively marketing healthcare services. With access to extensive patient health history data, marketers can understand and help providers address the personalized and holistic health needs of individual patients. With gen AI, they can design and prescribe hyper-personalized strategies, including preventive care campaigns in healthcare and precision medicine initiatives tailored to individual genetic profiles. “As predictive analytics, AI and other ethical solutions are reviewing and monitoring data, they’re actually creating opportunities for preventative intervention,” says Drake. “That’s going to help the fact that our patient population is growing faster than our population of caregivers. And there are clear cost-benefit implications as well.”
- **Privacy is even more paramount.** While gen AI and predictive ML have huge potential for transforming healthcare and life sciences, organizations must still adhere to regulatory frameworks like HIPAA and good practice (GxP) to safeguard the privacy of patients, clinical trial participants and research subjects. It is crucial that AI-generated content does not unintentionally disclose personally identifiable information (PII) or protected health information (PHI). Marketers must prioritize and maintain compliance with regulatory and ethical standards in using this data.
- **Data collaboration and partnerships are gaining importance.** In the complex healthcare ecosystem of providers, insurance companies and patients, first-party marketing data alone is not enough to power precisely targeted campaigns. With the growing sophistication of platforms with advanced data sharing capabilities, modern marketers can securely collaborate with internal business units and third parties to enhance their insights while preserving privacy and masking sensitive data. For example, providers can benefit from accessing information from insurance claims data to better understand patient histories and treatment patterns. And they can use data clean rooms to securely combine clinical trial data with insurance claims to personalize and improve patient care while maintaining privacy.



- **Data gravity is a key factor.** These industries generate and accumulate vast amounts of data from various sources over time, including patient electronic health records, genomic sequences and annotations, clinical trials, images, claims, enterprise resource planning and commercial tools. To effectively work with their data, healthcare and life sciences organizations must unify data onto one platform and bring new technologies and application processing to the data, not the other way around. For example, a pharmaceutical company can unify data from patient electronic health records, social media sentiment analysis and sales to help shape effective messaging for new drug launches. By applying advanced analytics to their integrated dataset, they can tailor their marketing strategies to specific demographics and regions for higher engagement and market penetration.

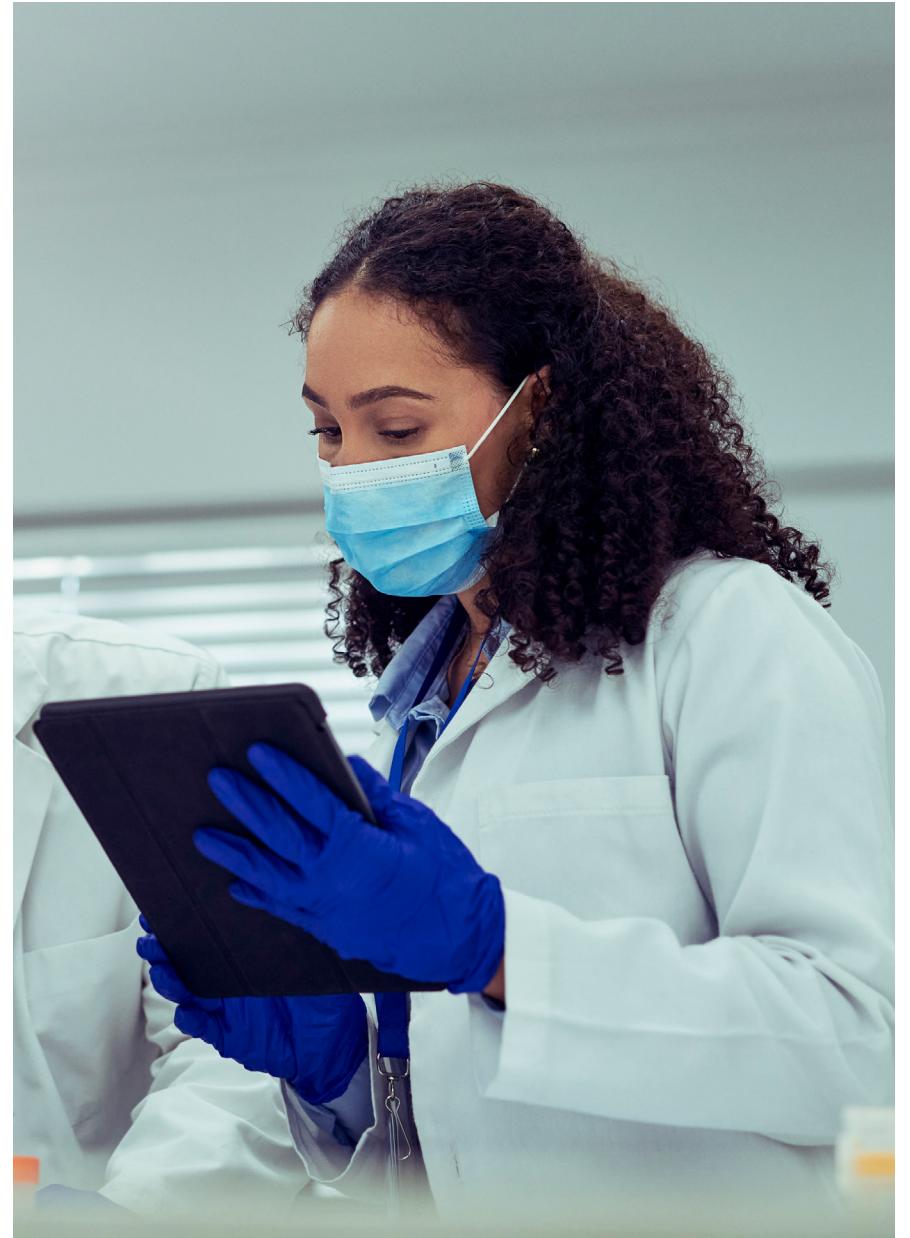
“

As predictive analytics, AI and other ethical solutions are reviewing and monitoring data, they're actually creating opportunities for preventative intervention.”



EDDIE DRAKE

*Industry Principal, Marketing and Advertising,
Snowflake*





MEDIA AND ENTERTAINMENT

In today's diverse and even fragmented media ecosystem, capturing peoples' attention for more than 8.25 seconds is a feat. Streaming continues to steadily increase its market share, now accounting for close to 40% of all TV viewing in the U.S., while short-form video content platforms like TikTok, YouTube shorts and Instagram reels gain in popularity, especially with younger demographics. And in a post-pandemic world, people are returning to theaters and arenas in droves, whether it's the Eras tour, Barbenheimer or the Paris Olympics.



In a world where media is everywhere we look – from streaming TV, web, social media, arena scoreboards and the rest – data and advertising drive it all. Despite a strengthening economy and raised expectations for ad spending, the advertising, media and entertainment industries continue to grapple with the changing ways people consume content. Marketers have to find ways to engage consumers with a personalized and seamless experience, delivering the content people want, just when they want it. Here are three high-level trends we're seeing in these industries:

- **Commerce media is fostering new partnerships.** Brands now have an increasingly powerful way to reach consumers who are ready to spend money: Inside the confines of ecommerce sites. The biggest online retail, travel, hospitality and telecom vendors are creating their own powerful ad networks. Advertisers and media companies will take advantage of this [\\$1.3 trillion](#) opportunity by collaborating with commerce sites, sharing first-party data in clean rooms that maintain the privacy of consumers' personal information. This will enable brand marketers to close the loop on attribution, increasing the efficiency of their ad spend.
- **Control of distribution will shift toward content owners.** Hugely popular entertainment franchises such as sports teams will market directly to consumers (D2C), bypassing traditional intermediaries such as television and radio networks. Content owners will collaborate directly with brand advertisers, using data collected on their customers and fans to deliver a more seamless and personalized experience.

- **AI will enable a huge leap forward in the evolution of adtech and martech.** Gen AI will bring more power to marketers and advertisers by making these tools much easier to use – increasing the efficiency, effectiveness and scalability of campaigns. "People who are doing campaign reporting and audience creation can now leverage AI to do their jobs more effectively, without having to rely on data engineering," says Bill Stratton, Global Industry GTM Lead for Media, Advertising and Entertainment at Snowflake.

THE BIGGEST ONLINE RETAIL, TRAVEL, HOSPITALITY AND TELECOM VENDORS ARE CREATING THEIR OWN POWERFUL AD NETWORKS.



RETAIL AND CONSUMER GOODS

Over the past decade, the landscape for retail and consumer packaged goods (CPG) has changed dramatically. Companies are still adjusting to the new normal of shopper behavior, which includes not only e-commerce, but also widespread adoption of contactless payments in stores and buy-online-pick-up-in-store options. Retailers and brands continue to look for ways to build customer loyalty, even in the face of rising prices, and optimize inventory management — a more challenging prospect in today's omni-channel ecosystem.



With the amount of time people spend online today, the makeup of e-commerce has also changed. The tremendous rise of retail media — selling ads at or near the point of purchase on sales platforms and in brick-and-mortar stores — has given retailers a high-margin revenue stream (margins of [80% for retail media](#) vs. 3–4% for typical retail), and given them great power over the golden goose: first-party consumer data. Here are some high-level trends we're seeing in retail and consumer goods:

- **First-party data is the big differentiator.** The collection, consolidation and activation of consumer information in a privacy-friendly way will be one of the most powerful drivers in consumer goods marketing. Intelligent use of first-party data will allow marketers to meet customers where they are and deliver the information they're looking for when they need it. That requires a deep understanding of each consumer — an understanding that data can deliver. Just as important, though, it creates new avenues to increase margins by monetizing data across their ecosystem and value chain.
- **Collaboration and data sharing will be more important than ever.** Consumer goods companies have the products people crave; retailers collect the first-party information consumer CPG brands need to understand what customers want. Stronger collaboration and data sharing using clean rooms will help both sides achieve their goals, while data gravity will minimize the potential for inadvertent leaks. “It’s nearly impossible to have a full view into your total sales without partnerships,” says Karl Rosen, Industry Principal for Retail Marketing and Advertising at Snowflake. “Data collaboration will unlock the next phase of growth for retailers and CPG brands.”

- **Brands will develop closer connections to customers.** CPG marketers will seek to build direct relationships with consumers via omni-channel campaigns and by consolidating data across these channels. An expanding constellation of commerce ad networks will open up more avenues for collaboration between brands, retailers and these nascent ad platforms.

“

Data collaboration will unlock the next phase of growth for retailers and CPG brands.”



KARL ROSEN

*Industry Principal, Retail Marketing and Advertising,
Snowflake*



TELECOMMUNICATIONS

When virtually everyone already has a mobile device and a carrier, acquiring new customers for telecom companies isn't about cultivating new markets, it's about outselling competitors. And while competing for market share with each other, carriers must also fend off emerging challenges from cable, satellite and fixed wireless providers. In this aggressively competitive market, there are three primary factors in play: pricing, technology and customer support. All three require that companies prioritize strategic investments in their technology. In addition to investing in 5G, fixed wireless, fiber optics and other network upgrades, telcos that capitalize on emerging trends and applications like adjacent B2B and B2C digital ecosystems will be more likely to succeed. Carriers who can deliver seamless experiences across multiple touchpoints are in the best position to prevail, and that will be determined by how well they deploy first-party data and AI.



To win new customers and keep the ones they have, telecommunication marketers need to carefully nurture the customer journey, guarding against attrition risks and curating the experience at every touch point. This kind of strategy requires a 360-degree customer view — and as the link in the value chain that directly interfaces with customers, telcos are uniquely equipped with the rich first-party data on consumer behavior, preferences and usage patterns to attain it. Here are three keys to telco marketing success we're tracking this year:

- **Use of first-party data for greater personalization, within limits.** Telecom companies collect an enormous amount of data about their customers, which they can use to personalize brand outreach. But because telecommunications is such a highly regulated industry, marketers must make sure to comply with regional rules around data privacy and security, such as those mandated by the U.S. Federal Communications Commission (FCC), Body of European Regulators for Electronic Communications (BEREC) and the European Commission (EC).
- **Commerce media is taking over and driving up margins.** By delivering targeted advertising to customers visiting a telecom site, marketers will be able to create an entirely new revenue stream — one with significantly higher margins (70–90%) than what carriers can demand for traditional goods and services.

- **Leveraging gen AI for targeted, optimized campaigns.** Applying gen AI to their data allows marketers to predict with reasonable certainty which touchpoints have the greatest impact on consumer purchase decisions, and which channels and messages will be the most effective. “Our mobile devices are natural extensions of who we are,” says Erin Foxworthy, Industry Lead, Marketing and Advertisers at Snowflake. “Marketers now realize with AI they can tap into new signals they’ve never had before, and those can really differentiate them from other brands in terms of how they speak with their consumer.”

“

Marketers now realize with AI they can tap into new signals they've never had before, and those can really differentiate them from other brands.”



ERIN FOXWORTHY

*Industry Lead, Marketing and Advertisers,
Snowflake*



DATA-EMPOWERED MARKETERS IN ACTION

Throughout these pages, we've talked about real marketers driving real campaigns — but what does that look like in practice? And how are these efforts advancing marketers' goals and moving the needle toward more purchases, better engagement, higher conversion and, ultimately, happier customers?

The forward-thinking marketers featured here are those who are tapping into the full power of the modern marketing data stack — with Snowflake as the foundation — to eliminate data silos and maximize the power of their data from a single source of truth.

In doing so, these customers are making their marketing goals a reality, from accelerating insights and tailoring experiences to optimizing marketing spend and improving engagement.





Allergan Aesthetics an AbbVie company

indeed

orangetheory[®]
FITNESS

LEARN MORE

Discover how more marketers are achieving amazing outcomes with a unified modern marketing data stack.

ALLERGAN lowered cost per acquisition by **41%** with machine learning models

CANVA reduced sync time from eight weeks to **10 HOURS** to deliver near real-time personalized experiences

OPENTABLE achieved up to **70%** conversion with half the martech spend by better targeting campaigns and eliminating data duplication

Canva

• ○ OpenTable™

IntelyCare

choreograph

ondeck

CONSTELLATION

Pizza Hut

Power Digital

dentsu

Sharesies

Spark^{nz}

sentosa™

Zillow[®]

ORANGETHEORY reduced customer acquisition cost (CAC) by **15-20%** by feeding offline conversion data to Google and Meta Ads

ZILLOW personalized content across paid and owned channels and saved **40 HOURS PER MONTH** on data analysis and aggregation



ACCOR doubled its click and open rate of their luxury segment customers



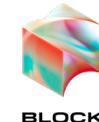
AB180



LEARN MORE

Discover how more marketers are achieving amazing outcomes with a unified modern marketing data stack.

LUCID boosted return on ad spend in Google Ads by **52%** and increased new users by **37%**



IMPERFECT FOODS reduced CAC by **15%** and increased customer reactivations by **53%** quarter over quarter



PUBLISHERS AND SOCIAL PLATFORMS

Publishers and social platforms are key to connecting marketers with their target audiences via the right ads at the right time. Organizations across this “sell side” of ads are also built on Snowflake, which helps the ecosystem collaborate securely, efficiently and with privacy.



Insider Inc.

STRAVA

A+E
NETWORKS

LIONSGATE

SAMSUNG Ads

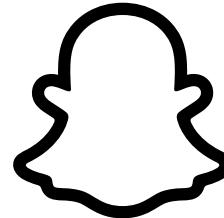
dpg media

NBCUniversal

bumble

Audacy

Roku



VICE

NBCUNIVERSAL'S AUDIENCE INSIGHTS HUB, powered by Snowflake data clean rooms, enables secure cross-cloud data collaboration for advertisers. This integration allows partners to explore digital audiences, conduct cross-platform planning, measure reach and frequency, and perform multi-platform attribution, all while maintaining stringent privacy controls and data security.

[LEARN MORE](#)

SNAP AND SNOWFLAKE'S COLLABORATION allows advertisers to securely share and analyze targeting and conversion data using clean rooms and conversion APIs. This integration enhances privacy and performance, streamlines campaign optimization, leverages advanced measurement tools, and minimizes data transfer points, making it easier for marketers to manage data.

[LEARN MORE](#)



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:

- Learn how to achieve business value across the full marketing lifecycle in [The Definitive Guide to Data-Driven Marketing](#).
- Discover reference architectures, industry specific use-cases and solutions best practices from Snowflake experts and partners in the [Solutions Center for marketing](#).
- Cut to the chase: Reach out to [speak one-on-one with a Snowflake expert](#) to learn how the AI Data Cloud can uplevel your marketing and much more.

APPENDIX



APPENDIX

DETAILED METHODOLOGY

FEATURED TOOLS AND PLATFORMS

The goal of this research was to pinpoint the technologies that have garnered a substantial and active customer base within Snowflake.

The study spanned a 12-month period, from May 1, 2023, to April 30, 2024, encompassing data from over 9,800 Snowflake customers.

The process was as follows:

Identifying technologies in the marketing data stack

- We assessed the use of marketing technologies by Snowflake's active customers during the analysis period. Active customers were defined as those who:
 - Held either a capacity or an on-demand/self-service contract with a valid end date, and
 - Generated revenue for Snowflake within the past year
- The technologies considered for the analysis were required to meet the following criteria:
 - The technologies considered as part of the three categories of data tools and platforms had to be active members of the Snowflake Partner Network (SPN) or have a comparable agreement in place with Snowflake.
 - The technologies for the seven categories of the marketing and advertising tools and platforms were required to either be active members of SPN or be Snowflake Marketplace providers that have agreed to the relevant Marketplace terms and conditions.

Categorizing technologies based on their type of Snowflake consumption

As Snowflake continues to enhance its platform capabilities and offer various application deployment models, vendors integrate with the AI Data Cloud in diverse ways to serve different purposes. To accurately assess market leadership and adoption levels from the lens of our customer base, specific metrics were applied based on the type of Snowflake consumption. The analysis categorized technology providers into two distinct groups:

- Technologies using Snowflake for data integration, transformation and analysis workloads
- Technologies utilizing Snowflake's collaboration workloads

Interestingly, there was minimal overlap, with less than 2% of tools operating in both categories. This approach provided a clear and precise evaluation of how different technologies leverage Snowflake's evolving capabilities to meet the needs of marketers.

Identifying key metrics for measuring success of marketing tools

To accurately measure the adoption success of marketing tools within each category in the stack, specific metrics were analyzed based on how the partner technologies leveraged Snowflake's capabilities.

- Metrics for technologies using Snowflake for data integration, transformation and analysis workloads were:
 - Total number of active customers using the technology, and
 - Total credit consumption by the technology on Snowflake, and
 - The percentage growth of both categories for the 12-month trailing period, in comparison to the prior 12-month trailing period
- Metrics for technologies leveraging Snowflake's collaboration capabilities:
 - Total number of stable edges that include the technology. Stable edges are the ongoing relationships between data 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 is driven by data shares that the technology uses on Snowflake
 - The growth of both of these for the 12-month trailing period, in comparison to the prior 12-month trailing period

Analyzing growth figures

We included all active capacity and self-service customers as of May 1, 2023, who generated positive revenue for Snowflake over the subsequent year. Growth percentages reflect the increased usage of each category's tools over the immediate 12-month trailing period between May 1, 2023, and April 30, 2024, compared to the previous 12-month period. By following this methodology, we aimed to provide a clear picture of the technologies gaining traction among Snowflake's customer base.



Creating a penetration index for Snowflake technologies

We developed an index to illustrate the market penetration and usage depth of technologies based on their interaction with Snowflake. The calculation uses weighted criteria tailored to different types of Snowflake usage:

- Technologies using Snowflake for data integration, transformation and analysis capabilities:
 - Breadth (40%): Number of active customers using the technology on Snowflake over the 12-month period of analysis
 - Depth (40%): Total credit consumption by the technology on Snowflake over the 12-month period of analysis
 - Growth of breadth and depth:
 - » (10%) Percentage growth of the total number of active customers using the technology for the 12-month trailing period, in comparison to the prior 12-month trailing period
 - » (10%) Percentage growth of the credit consumption by the technology for the 12-month trailing period, in comparison to the prior 12-month trailing period
- Technologies utilizing Snowflake's collaboration workloads:
 - Breadth (40%): Number of stable edges of the technology on Snowflake over the 12-month period of analysis
 - Depth (40%): Total credit consumption by the technology on Snowflake over the 12-month period of analysis
 - Growth of breadth and depth:
 - » (10%) Percentage growth of the total number of stable edges of the technology on Snowflake over the 12-month trailing period of analysis, in comparison to the prior 12-month trailing period
 - » (10%) Percentage growth of the consumption by the technology for the 12-month trailing period, in comparison to the prior 12-month trailing period
 - » Note that the enrichment and hygiene category – which in last year's report was based solely on stable edges delivered by the partner – has been updated for this year's report to follow the same index applied to the other collaboration workload categories.
- This index provides a comprehensive view of both the market reach and the intensity of technology usage within Snowflake's ecosystem.

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.

Attribution of Snowflake technology distinctions for each partner

- Real-time enabled: Refers to organizations within the modern marketing data stack, categorized either as Leaders or Ones to Watch, that used a minimum 40 consumption credits between May 1, 2023, and April 30, 2024 (roughly three per month), for Snowpipe Streaming and/or Dynamic Tables. This designation does not encompass all partners offering real-time services, as some may not meet the criteria as defined for this report but may offer real-time services directly to customers.
- AI-ready: Partners within the modern marketing data stack, categorized either as Leaders or Ones to Watch, that used a minimum 40 consumption credits between May 1, 2023, and April 30, 2024, (approximately three per month) across Cortex LLM, Cortex AI, Machine Learning Credits or Unmanaged ML Packages.
- Snowflake Native app: Partners that have a Snowflake Native App, either privately available, publicly listed or jointly announced, at the time of publication.



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 AND DATA CAPTURE

Adverity is an integrated data platform, Powered by Snowflake, that allows marketing teams to scale their marketing reporting and analytics programs. The platform enables businesses to blend disparate datasets to create a single source of truth over business performance. Through automated connectivity to more than 600 data sources and destinations, AI-powered data transformation options, and robust data governance features, Adverity is an easy way to get your data how you want it, where you want it and when you need it. Learn more at adverity.com/data-destinations/snowflake.

Amplitude is a leading digital analytics platform that helps companies unlock the power of their products. Over 2,700 customers rely on Amplitude to gain self-service visibility into the entire customer journey. Amplitude guides companies every step of the way as they capture data they can trust, uncover clear insights about customer behavior, and take faster action. When teams understand how people are using their products, they can deliver better product experiences that drive growth. Amplitude is a best-in-class analytics solution for product, data and marketing teams, ranked No. 1 in multiple categories in G2's Winter 2024 Report. Learn how to optimize your digital products and business at amplitude.com.

Funnel marketing intelligence helps marketing teams level up their performance. With Funnel, marketers can build a solid foundation of marketing data by connecting and modeling their data, then use that data to power their reporting, measure their marketing efficiency and export the data wherever it needs to be. With solid connections that serve up game-changing insights, data-driven companies can experience the full impact of their data.

Heap by Contentsquare is one of the top product analytics platforms, with customers across all industries and market segments — from SMB to enterprise. Today, more than 10,000 companies use Heap's cross-device and cross-channel analytics to visualize customer engagement over time and improve adoption and retention. Heap was acquired by Contentsquare in December 2023.

Improvado is an AI-powered marketing analytics and intelligence platform designed for marketing and analytics teams to unlock the power of data to drive impactful business decisions. Improvado provides an end-to-end and customized analytics solution for medium to large enterprises and agencies. Its platform integrates, simplifies, governs and attributes complex revenue data across more than 500 sources, offering a unified, clear view of marketing ROI and performance. For more information, visit improvado.io.

Mixpanel revolutionizes how companies link product analytics to tangible business outcomes. By understanding the full impact of product and marketing decisions, companies have the necessary information to optimize how they acquire and grow their customers. By providing complete, self-serve and correct data in an easy-to-use platform, Mixpanel frees teams to move faster, see the whole picture and measure impact.

Piano's Digital Experience Platform empowers organizations to understand and influence customer behavior. By unifying customer data, analyzing behavior metrics and creating personalized customer journeys, Piano helps brands launch campaigns and products faster, strengthen customer engagement, and drive personalization at scale from a single platform. Headquartered in Amsterdam with offices across the Americas, Europe and Asia Pacific, Piano serves a global client base. Piano has been recognized as one of the fastest-growing, most innovative technology companies in the world by World Economic Forum, Inc., Deloitte, American City Business Journals and more. For more information, visit piano.io.



Snowplow is a global leader in customer data infrastructure (CDI) for AI, enabling every organization to own and unlock the value of its customer behavioral data to fuel AI-driven marketing, digital products and services, customer experiences, and fraud mitigation. Companies in media and entertainment, retail, and other industries use Snowplow to collect and manage real-time, structured and unstructured behavioral data governed in their Snowflake AI Data Cloud. Thousands of companies rely on Snowplow worldwide to generate AI-ready data to uncover deeper customer journey insights, predict customer behaviors, optimize differentiated customer experiences, and detect fraud. Learn more at snowplow.io. Get started with the Snowplow solution: Using Snowplow Digital Analytics to Deliver Real-Time Insights into Customer Behavior [here >](#)

Supermetrics is a leading marketing data platform that empowers you to connect and integrate your marketing data seamlessly into Snowflake. By integrating with Snowflake, Supermetrics allows you to unlock deeper insights, scale your data operations, and easily make data-driven decisions. Whether your team needs to centralize data for advanced analytics, visualize it in BI tools like Power BI or Looker Studio, or manage it directly in Google Sheets, Supermetrics offers the flexibility to meet varying data needs while ensuring complete control over your marketing data within Snowflake. Start a free trial at supermetrics.com/products/snowflake.

ENRICHMENT AND HYGIENE

Affinity Solutions (Affinity) is a leading consumer purchase insights company. Affinity provides a complete view of U.S. and U.K. consumer spending, across and between brands, via exclusive access to fully permissioned data from over 140 million debit and credit cards. This data is transformed into privacy-compliant, actionable intelligence for marketers, consultancies and financial services companies to drive strategic growth and lasting customer relationships. Visit affinitysolutions.com to discover how Affinity is shaping the future of consumer purchase insights.

Cybersyn is a data-as-a-service (DaaS) company dedicated to making the world's data transparent and accessible. Cybersyn empowers companies to apply data-driven strategies to gain a competitive edge.

Deep Sync is an industry leader in deterministic identity and AI-powered data solutions. Leveraging its 35-year foundation of compiling direct mail-grade datasets, Deep Sync develops data-first technologies that power marketing, measurement, AI and business intelligence for agencies and brands with its fully deterministic identity graph, privacy-first audiences and comprehensive data solutions. Deep Sync's Complete Data Hygiene and Customer Data Enrichment applications – available as Snowflake Native Apps in the Snowflake AI Data Cloud for Marketing – enable marketers to improve the quality and usability of their first-party data without ever leaving Snowflake. Learn more at deepsync.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 risk management 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 datasets 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 datasets available for immediate ingestion via Snowflake Marketplace, enabling actionable insights faster.

G2 is one of the world's largest and most trusted software marketplaces. More than 90 million people annually – including employees at all Fortune 500 companies – use G2 to make smarter software decisions based on authentic peer reviews. Thousands of software and services companies of all sizes partner with G2 to build their reputation and grow their business. To learn more, visit g2.com.

IPInfo enables organizations to use IP address data at scale. With over 100,000 users, IPInfo specializes in accurate IP address data. Customers use IPInfo's proprietary database and APIs to improve use cases for cybersecurity, financial technology, healthcare and many others. Learn more at ipinfo.io.

S&P Global provides essential intelligence. The company equips governments, businesses and individuals with the right data, expertise and connected technology so they can make decisions with conviction. From helping customers assess new investments to guiding them through ESG and energy transition across supply chains, S&P Global unlocks new opportunities, solves challenges and accelerates progress for the world. S&P Global is widely sought after by many of the world's leading organizations to provide credit ratings, benchmarks, analytics and workflow solutions in the global capital, commodity and automotive markets. For more information, visit spglobal.com.

Similarweb offers a leading platform for digital intelligence, providing businesses with comprehensive insights into the digital world. Marketers, analysts and business leaders use Similarweb to identify strategic opportunities, mitigate competitive risks and optimize customer acquisition strategies. Integrating with Snowflake's AI Data Cloud, Similarweb enhances the marketing data stack by delivering accurate, real-time digital data that drives informed decision-making. This seamless integration allows users to leverage Similarweb's extensive datasets directly within their Snowflake environment, ensuring that marketers can quickly access and activate the insights needed to boost revenue and stay competitive in the rapidly evolving digital landscape. Learn more at similarweb.com.



Weather Source is a leading provider of weather and climate technologies, offering a global set of hyper-local weather information that flows seamlessly from the past to present and into the forecast. By leveraging modern technologies such as AI and ML combined with Snowflake's unmatched performance and data sharing capabilities, Weather Source is able to deliver data and insights to customers in the most cost-effective and performant manner possible for a wide range of industries and myriad use cases. Learn more at weathersource.com.

ZoomInfo is a trusted go-to-market platform for businesses to find, acquire and grow their customers. It delivers accurate, real-time data, insights and technology to more than 35,000 companies worldwide. Businesses use ZoomInfo to increase efficiency, consolidate technology stacks, and align their sales and marketing teams – all in one platform. ZoomInfo is a recognized leader in data privacy, with industry-leading GDPR and CCPA compliance and numerous data security and privacy certifications. For more information about how ZoomInfo can help businesses grow their revenue at scale, visit zoominfo.com.

IDENTITY AND ONBOARDING

Acxiom® is a global leader in customer intelligence and stands at the forefront of AI-enabled, data-driven marketing. As part of the Interpublic Group of Companies, Inc. (IPG), Acxiom specializes in high-performance solutions that boost customer acquisition and retention while fueling growth for the world's biggest brands and agencies. Acxiom transforms omni-channel marketing strategies and execution using AI-powered data and identity foundations, cloud-based data management, and martech and analytics services. For over 55 years, Acxiom's teams across the U.S., U.K., Germany, China, Poland and Mexico have helped businesses optimize their marketing and advertising investments while prioritizing customer privacy. Learn more at acxiom.com.

Audience Acuity enables clients to identify and engage people-based audiences across all channels. Powered by the Super Identity Graph, a deterministic identity framework curated in-house from more than 80 source feeds and trillions of monthly signals, Audience Acuity offers solutions in identity, enrichment, profile, activation, measurement and attribution. Utilizing a proprietary 23-step data science routine, then validated against third-party truth sets, it covers nearly the entire U.S. adult population across all touchpoints online and offline with pinpoint accuracy. This unique, highly authoritative data asset – purely deterministic at scale – consistently ranks in Truthset's top three providers.

Experian, a leader in identity and onboarding, partners with Snowflake to provide enhanced identity resolution in a secure environment. Experian now offers clients the ability to deliver their living unit IDs (LUIDs) via Snowflake, allowing them to link their data with Experian's

consumer view or other datasets. This feature enables clients to enrich their first-party data without data ever leaving their Snowflake account. Experian's collaboration with Snowflake strengthens data delivery and increases match rates for advertisers, platforms and measurement providers, making it easier to connect and collaborate on data. With Experian's trusted expertise, marketers gain insights, create personalized campaigns and reach their audiences across multiple channels.

FullContact is a privacy-focused identity company that connects people and brands. The FullContact identity graph links personal, professional and company identities, combining offline and online data to optimize customer experiences and improve ad targeting. FullContact's Snowflake Native App is available on Snowflake Marketplace and integrates directly with their clients' Snowflake AI Data Cloud, offering secure data sharing and unification. FullContact provides a persistent, portable PersonID and real-time website visitor recognition. This technology connects known and unknown identity fragments to a single PersonID, enabling brands to create personalized omni-channel experiences across media, websites, platforms and customer services. For more information, visit fullcontact.com/partners/snowflake.

Get started with the FullContact solution: Build a Robust Identity Resolution and Customer Recognition App Using FullContact on Snowflake [here](#) >

LiveRamp is a data collaboration platform used by Bloomberg Global 1000 companies in retail, CPG, grocery, QSR, finance, travel, hospitality and automotive. LiveRamp offers a Snowflake Native App and integrated services for Snowflake's AI Data Cloud to help marketers, analysts and data specialists create the most accurate and complete view of the customer journey through individual and household-centered identity resolution solutions. LiveRamp helps marketers improve performance through enhanced audience addressability and activation, and offers unified partner collaboration, walled garden measurement, and deduplicated cross-screen TV measurement through the LiveRamp Clean Room, powered by Habu, built on top of Snowflake framework. Learn more at liveramp.com.

Get started with the LiveRamp solution: How To Use LiveRamp Embedded Identity Solutions for Data Collaboration and Consolidation [here](#) >

MediaWallah is an identity company with the mission of putting brands, publishers and data platforms back in charge of their people-based initiatives. In a field dominated by rigid, black-box identity solutions, MediaWallah stands out by giving its clients flexible architecture, transparency and data at scale to connect, share and activate successfully. Whether you need to create a full 360 view of a customer, pinpoint customers based on audience attributes, or leverage identity to power your own proprietary solution, MediaWallah's identity resolution, onboarding, first-person targeting and identity graphs help you maximize identity ROI and forge your own identity. Learn more at mediawallah.com.



Merkle, a dentsu company, powers the experience economy. For more than 35 years, the company has put people at the heart of its approach to digital business transformation. As one of the only integrated experience consultancies in the world with a heritage in data science and business performance, Merkle delivers holistic, end-to-end experiences that drive growth, engagement and loyalty. Merkle's expertise has earned recognition as a leader by top industry analyst firms in categories such as digital transformation and commerce, experience design, engineering and technology integration, digital marketing, data science, CRM and loyalty, and customer data management. For more information, visit merkle.com.

TransUnion is a global information and insights company. TransUnion makes trust possible by ensuring each person is reliably represented in the marketplace. TransUnion does this with a Tru™ picture of each person: an actionable view of consumers, stewarded with care. Through its acquisitions and technology investments TransUnion has developed innovative solutions that extend beyond its strong foundation in core credit into areas such as marketing. Underpinned by its identity graph which covers over 250 million U.S. adults and thousands of attributes, TransUnion's TruAudience native identity applications are available in Snowflake Marketplace and in Snowflake Data Clean Room. Learn more at transunion.com.

Truelty is an engine that enables Snowflake and Truelty customers to stitch duplicates for as many records as they wish, without incurring per-record fees. Customers can tailor it to maximize the matching and sensitivity, putting them in control of their deduplication efforts. Out of the box, Truelty has prebuilt categories that mirror Snowflake's data profiling, and customers are free to add their own categories to stitch. It was developed using record sets in the billions, so it is highly tuned to optimize compute, enabling customers to deploy Truelty on large landscapes at a very low cost.

Verisk Marketing Solutions (VMS) is a leader in consumer data, providing multisourced, authoritative, deterministic and modeled data for nearly every U.S. consumer and household. With VMS data, marketers and advertisers can securely and seamlessly acquire prospect profiles and enrich first-party consumer profiles with up-to-date identifiers, demographics, attributes and in-market behaviors across sectors like insurance and financial services. All VMS data is responsibly sourced and maintains industry standards for data security and consumer privacy, and is compliant with state and federal rules for permissible collection and use of consumer data, and right to opt-out. Learn more at marketing.verisk.com/partners/snowflake/.

CUSTOMER DATA PLATFORMS

Acquia empowers ambitious digital innovators to craft the most productive, frictionless digital experiences that make a difference to their customers, employees and communities. Acquia provides a leading open digital experience platform (DXP), built on open source Drupal, as part of their commitment to shaping a digital future that is safe, accessible and available to all. With Acquia Open DXP, you can unlock the potential of your customer data and content, accelerating time to market and increasing engagement, conversion and revenue. Learn more at acquia.com.

ActionIQ is a new kind of customer data platform for enterprise brands who want to grow faster and deliver meaningful experiences for their customers. ActionIQ's unique composable architecture gives marketers easy and secure ways to activate data anywhere in the customer experience while keeping data securely where it lives. Enterprise brands use ActionIQ to drive growth through extraordinary customer experiences. Learn more at actioniq.com.

With **Amperity**, brands can build a first-party data foundation to fuel customer acquisition and retention, personalize experiences that build loyalty, and manage privacy compliance. Using patented AI and machine learning methods, Amperity stitches together all customer interactions to build a unified view that seamlessly connects to marketing and technology tools. Amperity delivers the data confidence brands need to unlock growth by truly knowing their customers. More than 400 brands worldwide rely on Amperity to turn data into business value. For more information, visit amperity.com.

Get started with the Amperity solution: Building a Unified Customer 360 Using Snowflake + Amperity [here >](#)

Census is a universal data platform that combines data transformation, activation and governance into one collaborative workspace. Census integrates with Snowflake to unite all teams and applications around a single source of truth. This integration helps marketing teams reduce customer acquisition costs, personalize messages for customers at scale, and centralize audience management with a marketer-friendly UI for segmentation. Learn more at getcensus.com.

Get started with the Census solution: Activate Snowflake Data for Personalized Marketing with Census [here >](#)



GrowthLoop is a leading composable customer data platform (CDP), combining the power of the Snowflake AI Data Cloud and AI to transform how enterprises build audience segments, orchestrate cross-channel journeys, and iterate on campaign results. Built for and by marketers, GrowthLoop pioneered the composable CDP category with a flexible, no-code solution that empowers teams to unlock the full potential of their first-party data. Its platform helps companies thrive by breaking down data silos and enabling cross-functional collaboration to unify data, strategy and teams. With its rapid expansion and dedication to creating an intelligent data-to-action loop, GrowthLoop is leading the charge for a new era of customer engagement. For more information, visit growthloop.com.

Hightouch is a leading composable CDP that empowers companies to activate the Snowflake AI Data Cloud to power personalized marketing and business operations. Hightouch makes it easy to collect behavioral events, resolve identities into customer 360 profiles, build audiences, sync data to over 200 destinations like ad platforms and CRMs, and analyze the results of marketing campaigns – all from the AI Data Cloud. Trusted by leading organizations, Hightouch enables anyone to deliver personalized customer experiences, optimize performance marketing and move faster by leveraging data across their organization. Learn more at hightouch.com.

Get started with the Hightouch solution: Campaign Intelligence with Composable CDP on Snowflake Using Hightouch [here >](#)

RudderStack, the AI Data Cloud Native CDP, is one of the only customer data platforms built from the ground up for data teams. With RudderStack, data teams can eliminate expensive data wrangling to focus on work that drives revenue. RudderStack collects behavioral data across the entire customer journey, unifies it in the AI Data Cloud with other customer data to produce comprehensive customer profiles, and makes a customer 360 available for downstream activation in real time. Its flexible architecture provides ultimate optionality, allowing companies to get more from their existing investments and eliminating lock-in so teams can scale with agility. Learn more at rudderstack.com.

Simon Data is a leading CDP for enterprise customer marketing teams using Snowflake. Top brands use Simon Data to centralize their customer data, build complex customer segmentation, and orchestrate the customer experience. Simon Data is on a mission to empower customer marketing teams with the data, tools and support to drive 1:1 customer personalization across every customer touch point.

Tealium connects data so businesses can better connect with their customers. Tealium's real-time data infrastructure allows brands to power their AI models and activate data for enhanced in-the-moment experiences. Tealium's turnkey integration ecosystem

supports more than 1,300 built-in connections from the world's most prominent technology experts. Tealium's solutions include a real-time customer data platform with machine learning, tag management, an API hub, and data management solutions that make customer data more valuable, actionable, privacy-compliant and secure. Named as a leader in the Gartner® Magic Quadrant for Customer Data Platforms™, more than 850 leading businesses globally trust Tealium to power their customer data strategies.

Get started with the Tealium solution: Collect and Activate Customer Data in Real Time with Tealium + Snowflake [here >](#)

Twilio Segment is a leading customer data platform (CDP) that helps companies harness first-party customer data. With Segment, companies can collect, govern, unify and activate customer data, and the interoperability between Segment and the Snowflake AI Data Cloud allow organizations to build trusted customer profiles that are accessible to marketing and data teams alike. Over 700 companies use Segment and Snowflake tools together to activate the data to improve customer acquisition and increase lifetime value through better personalization strategies, marketing ROI and customer retention.

MARKETING AND CUSTOMER ENGAGEMENT

Adobe Experience Cloud unifies market-leading customer data, analytics, content management and personalization solutions on a single platform for brands to deliver end-to-end personalization at scale.

Attentive® is an AI-powered SMS and email marketing platform that delivers unparalleled messaging performance on the channels that matter most. Infusing intelligence at every stage of the consumer's purchasing journey, Attentive empowers businesses to achieve hyper-personalized communication with their customers on a large scale. Brands can sync their first-party data from Snowflake's AI Data Cloud with Attentive, activate their data across the Attentive platform, and boost results driven by Attentive AI™. Trusted by over 8,000 leading brands, Attentive is the go-to solution for delivering powerful commerce experiences for consumers with the brands they love. Visit attentive.com.

Braze is a leading customer engagement platform that empowers brands to Be Absolutely Engaging™. Braze allows any marketer to collect and take action on any amount of data from any source, so they can creatively engage with customers in real time, across channels from one platform. From cross-channel messaging and journey orchestration to AI-powered experimentation and optimization, Braze enables companies to build and maintain absolutely engaging relationships with their customers that foster growth and loyalty.



Cordial is an award-winning marketing and data platform used by enterprise companies to activate customers with multi-channel orchestrations, trigger high-value automations based on behaviors and data, and build an even deeper understanding with AI. Cordial's bidirectional data-sharing integration with the Snowflake AI Data Cloud allows clients to security access and analyze first-party customer data instantly. Cordial also automatically detects and loads new contact data from Snowflake into Cordial, which reduces enterprise implementation time to less than 60 days, enriches the profile data for better segmentation, and creates more personalized messaging across channels.

Get started with the Cordial solution: Cordial and Snowflake Bidirectional Data Integration for Real-Time Customer Data [here >](#)

HubSpot is a customer platform that helps businesses connect and grow better. HubSpot delivers seamless connection for customer-facing teams with a unified platform that includes AI-powered engagement hubs, a smart CRM, and a connected ecosystem with over 1,500 App Marketplace integrations, a community network and educational content. Learn more at [hubspot.com](#).

Iterable is an AI-powered customer communication platform that helps organizations activate customers with joyful interactions at scale. With Iterable, organizations drive high growth with individualized, harmonized and dynamic communications that engage customers throughout the entire lifecycle at the right time. Iterable's Snowflake Secure Data Sharing integration empowers mutual customers to seamlessly and securely create a 360-degree view of their customers by incorporating Iterable-enriched data such as AI-powered user classifiers like brand affinity and predictive goals, additional user profile data, and customer behavioral data. This integration drives deeper customer engagement and better business outcomes, as well as significant time and cost savings. Learn more at [iterable.com](#).

MessageGears is a data activation and engagement platform that empowers enterprises to leverage their entire dataset for limitless communication across multiple channels, including email, SMS, mobile and hundreds of third-party platforms. MessageGears facilitates efficient and secure data access without the need for moving, copying or syncing. Founded with the goal of helping enterprise brands take total command of their data, MessageGears' composable approach eliminates latency, mitigates security risks, and reduces costs associated with traditional ESPs, CDPs and marketing clouds. Learn more at [messagegears.com](#).

Optimove is one of the first customer-led marketing platforms trusted by leading global brands across diverse industries. Its mission is to unleash brands' full potential and gain their customers' loyalty for life. Combining rich historical, real-time and predictive customer data, Optimove uniquely powers AI-led multi-channel journey orchestration and statistically credible multi-touch attribution of every marketing action. With Optimove, marketers can deliver highly personalized and relevant customer messages with agility that matches the speed of their consumer's interaction with the brand.

Salesforce helps organizations of any size reimagine their business for the world of AI. With Agentforce, Salesforce's trusted platform, organizations can bring humans together with agents to drive customer success — powered by AI, data and action.

Zeta Global is an AI-powered marketing cloud that leverages advanced AI and trillions of consumer signals to make it easier for marketers to acquire, grow and retain customers more efficiently. Zeta Global's enterprise customers across multiple verticals are empowered to personalize experiences with consumers at an individual level across every channel, delivering better results for marketing programs. Zeta is proud to be a Snowflake Data Cloud Product Partner, enabling marketers to seamlessly exchange real-time data between the Snowflake AI Data Cloud and the Zeta Marketing Platform, resulting in more engaged, loyal customers at a lower cost of business. Learn more at [zetaglobal.com/platform](#).

PROGRAMMATIC SOLUTIONS

Chalice Custom Algorithms is a leading AI application for brands applying their own data and analytics in the real-time decisioning of ad buys. Chalice's software automates data ingestion, predictive analytics and deployment of custom bidding instructions in a supervised-learning environment, where advertisers can visualize and test their custom algorithms. Advertisers' algorithms can be deployed in all major demand-side platforms (DSPs), as well as Meta and YouTube. Chalice AI is configurable to predict any business outcome, using any input data the advertiser owns or licenses. Common use cases include offline sales, brand lift, incremental reach, incremental sales, lifetime value and inventory quality. Chalice was named "Best Demand Side Tech" by AdExchanger in 2022, and powered AdWeek's "Best Use of Programmatic" in the 2023 Media Plan of the Year awards. Learn more at [chalice.ai](#).

Get started with the Chalice solution: Detect Overbidding in Programmatic Ad Auctions Using TVB [here >](#)



FreeWheel empowers all segments of the new TV ecosystem and is structured to provide the full breadth of solutions the advertising industry needs to achieve their goals. FreeWheel provides the technology, data enablement and convergent marketplaces required to ensure buyers and sellers can transact across all screens, across all data types and all sales channels, to ensure the ultimate goal: results for marketers. With offices in New York, Chicago, London, Paris, Beijing and around the globe, FreeWheel, a Comcast Company, stands to advocate for the entire industry through the FreeWheel Council for Premium Video. For more information, visit freewheel.com.

Magnite is one of the world's largest independent sell-side advertising companies. Publishers use Magnite's technology to monetize their content across all screens and formats including CTV, online video, display and audio. The world's leading agencies and brands trust Magnite's platform to access brand-safe, high-quality ad inventory and execute billions of advertising transactions each month. Anchored in New York City, Los Angeles, Denver, London, Singapore and Sydney, Magnite has offices across North America, EMEA, LATAM and APAC.

OpenX is an independent omni-channel supply-side platform (SSP) and a global leader in supply-side curation, transparency and sustainability. Through its 100% cloud-based tech stack, OpenX powers advertising across CTV, app, mobile web and desktop, enabling publishers to deliver marketers with improved performance and dynamic future-proofed solutions. With a 17-year track record of programmatic innovation, OpenX is a direct and trusted partner of the world's largest publishers, working with over 130,000 premium publisher domains and over 100,000 advertisers. OpenX was the first advertising, media or technology company to be certified as CarbonNeutral™ and third-party verified for achieving its SBTi Net-Zero targets.

Sharethrough, an Equativ company, is a trusted independent omnichannel ad exchange that brings scale and simplicity to digital advertising worldwide. Serving the interests of advertisers, media owners and technology partners via research-backed ad enhancements and curated ad inventory optimized for directness, sustainability and quality, Sharethrough maximizes user attention and advertiser performance. Sharethrough has been awarded Best Sustainable Ad Tech Platform by Digiday Technology Awards, Best Sustainable Initiative by Performance Marketing World Awards and recognized among the 2024 Top Programmatic Power Players by AdExchanger.

StackAdapt is a leading programmatic advertising platform offering cross-channel targeting and automation solutions. Business leaders can leverage 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 seamless, highly targeted and personalized campaigns efficiently. StackAdapt focuses on helping business users find the best audiences and reduce friction in activating first-party data. With advanced audience targeting capabilities, users can automatically sync first-party data and reach the most relevant audiences through AI-driven recommendations, boosting performance. This enables data-driven digital advertising campaigns across all devices, inventory and publisher partners, maximizing ROI while ensuring compliance and security.

The Trade Desk is a technology company that powers buyers of digital advertising. Through its self-service, cloud-based platform, ad buyers can create, manage and optimize digital advertising campaigns across ad formats and devices, including connected TV. Combined with Snowflake, customers of The Trade Desk can access their data in a safe, secure manner at the event level when executing campaigns. This cross-channel, log-level data enables marketing campaign managers, ad buyers and marketing analytics teams to run full-funnel attribution and improve data analysis. This advanced analytics environment has the added benefit of keeping the data in a single place, maintaining an easy path to activation in the bid stream.

MEASUREMENT AND OPTIMIZATION

AdImpact is a leading advertising and market intelligence company. AdImpact specializes in tracking and analyzing advertising data across various media channels, including traditional, digital and emerging platforms. AdImpact's real-time monitoring captures over 1 billion TV ad occurrences daily across 210 designated market areas (DMAs) and over 90,000 brands.

AppsFlyer helps brands make good choices for their business and their customers with its advanced measurement, data analytics, deep linking, engagement, fraud protection, data clean room and privacy preserving technologies. Built on the idea that brands can increase customer privacy while providing exceptional experiences, AppsFlyer empowers thousands of creators and more than 10,000 technology partners to create better, more meaningful customer relationships. To learn more, visit appsflyer.com.



Comscore is a global, trusted partner for planning, transacting and evaluating media across platforms. With a data footprint that combines digital, linear TV, over-the-top and theatrical viewership intelligence with advanced audience insights, Comscore empowers media buyers and sellers to quantify their multi-screen behavior and make meaningful business decisions with confidence.

Eppo is a leading experimentation platform for modern data, engineering and product teams. Eppo centralizes the entire feature flagging and experimentation workflow directly on top of customers' Snowflake instances, helping them run trustworthy and impactful experiments across every use case: product growth, machine learning, monetization and email marketing. Trusted by dozens of leading enterprises, Eppo democratizes high-quality experimentation, enabling teams to make data-driven decisions and optimize user experiences efficiently and effectively.

iSpot helps advertisers drive ad effectiveness with unified TV and video measurement, from creative to audience to outcomes. Its fast, accurate and actionable measurement solutions enable advertisers to assess creative effectiveness, improve media plans, and drive business outcomes from TV and streaming advertising. iSpot solutions measure the performance of every ad on TV with digital-like precision and granularity. Empowered with always-on cross-platform performance insights, advertisers can take quick and confident action to cut wasted ad spend. With currency-grade measurement, large-scale verified insights and deep competitive intelligence, iSpot gives advertisers control and confidence amid the chaos of the new media landscape. Learn more at [ispot.tv](#).

Kumo is a predictive modeling platform that empowers data scientists to quickly build highly accurate models inside Snowflake. Kumo supports useful, proven AI scenarios like recommendations, personalized communications, next-best action and more. Using the entirety of a client's Snowflake AI Data Cloud, composed of multiple tables of structured and unstructured data, Kumo uniquely combines pre-trained LLMs for processing textual and image data with graph transformers. This produces highly accurate predictions and eliminates feature engineering and training set generation. Kumo accelerates predictive model creation from months to days, and improves model performance by double digits. Try it with your data: [kumo.ai](#).

Get started with the Kumo solution: Making Product Recommendations to High Value Customers with Kumo AI [here >](#)

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through an understanding of people and their behaviors across all channels and platforms, Nielsen empowers its clients with independent and actionable intelligence so they can connect and engage with their audiences – now and into the future. Nielsen operates around the world in more than 55 countries. Learn more at [nielsen.com](#).

Optimizely is an all-in-one operating system for marketing which powers brands' entire marketing lifecycle, unlocking teams to create content with speed, launch experiments with confidence, and deliver experiences of the highest quality.

Rockerbox centralizes advertising data across all media channels to help marketers solve their core challenges – accurately attributing conversions, optimizing media investments and driving growth. Their products aim to simplify the complexity of multi-channel marketing, enabling large brands to leverage best-in-class MMM, MTA, testing and other analyses for enhanced strategic decision-making. Rockerbox helps brands make informed decisions via a centralized view of their marketing.

VideoAmp is a media measurement company transforming advertising. By leveraging the power of currency-grade big data, VideoAmp's solutions allow clients to access advanced audiences and real-time insights to plan, optimize and measure media investments across platforms. With these solutions, media sellers can increase the value of their inventory, while advertisers can benefit from increased return on investment. VideoAmp is headquartered in Los Angeles and New York with offices across the United States.

INTEGRATION AND MODELING

Airbyte, a leading open data movement platform, empowers data teams in the AI era by transforming raw data into actionable intelligence with the largest ecosystem of more than 300 connectors and 20,000 data engineers. Adhering to the industry's best security and compliance standards, it offers low-code, no-code and AI-powered connector development for structured and unstructured data. Teams can manage pipelines flexibly via API, Terraform, AI connector builder UI and Python libraries across multi-cloud and hybrid deployments. Trusted across 7,000 enterprises, Airbyte is the go-to solution for modern data management. To learn more, visit [airbyte.com](#).

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. Learn more at [alteryx.com](#).



Coalesce accelerates the delivery of data projects by enabling data professionals to more easily and efficiently transform data. Recognizing data transformation's critical role in the analytics lifecycle, Coalesce created an inclusive developer platform that automates most SQL coding without sacrificing flexibility and can be easily used by data professionals of all experience levels. The platform allows faster data pipeline development, boosting data team efficiency tenfold. As a result, teams across an organization — from marketing and sales to operations and engineering — can extract maximum value from their data. Discover more at coalesce.io.

Dataiku is a universal AI platform, uniting the technology, teams and operations needed for companies to build intelligence into their daily operations, from modern analytics to generative AI. Together, they design, develop and deploy new AI capabilities, at all scales and in all industries. More than 600 companies worldwide use Dataiku, bringing together experts from across their organizations. In an insurance company, data scientists collaborate with actuaries, while in a manufacturing company, machine learning engineers collaborate with process engineers. Dataiku is one of the only products on the market allowing for this broad and powerful collaboration. Learn more at dataiku.com.

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 40,000 companies using dbt every week. To learn more about dbt Labs, visit getdbt.com.

Fivetran, a global leader in data movement, helps customers use their data to power everything from AI applications and ML models, to predictive analytics and operational workloads. The Fivetran platform reliably and securely centralizes data from hundreds of SaaS applications and databases into any cloud destination — whether deployed on-premises, in the cloud or in a hybrid environment. Thousands of global brands trust Fivetran to move their most valuable data assets to fuel analytics, drive operational efficiencies and power innovation. For more info, visit fivetran.com.

Get started with the Fivetran solution: Build a RAG-based Chatbot Using Structured Data with Fivetran and Snowflake [here >](#)

Hex provides a complete workspace for analytics and data science, helping data teams tackle their organization's toughest questions and equipping business teams with data in actionable ways. Thousands of leading data teams love Hex's collaborative, notebook-style workspace for exploratory analytics and interactive data apps for operational reporting and empowering stakeholders. Data teams save thousands of hours by unifying their fragmented workflows and accelerating analysis with built-in AI. Hex integrates with your whole stack and offers flexible deployment models, including multi-tenant, HIPAA, single-tenant and private cloud. Learn more at hex.tech.

Get started with the Hex solution: Optimizing Marketing Budget Using Snowpark ML in Hex Notebooks [here >](#)

Informatica, a leader in enterprise AI-powered cloud data management, brings data and AI 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). IDMC is an end-to-end data management platform, powered by CLAIRE® AI, that connects, manages and unifies data across any multi-cloud or hybrid system, democratizing data and enabling enterprises to modernize and advance their business strategies. Customers in approximately 100 countries, including more than 80 of the Fortune 100, rely on Informatica to drive data-led digital transformation.

Matillion is a data pipeline platform that empowers data teams to build and manage pipelines faster for AI and analytics — at scale. Matillion allows data engineers to take advantage of AI capabilities and code-optional workflows, harness the processing power of their AI Data Cloud, and leverage generative AI to enhance data that is used for operational and advanced analytics. Thousands of enterprises trust Matillion for a wide range of use cases from insights and operational analytics to data science and machine learning to AI. Learn more at matillion.com.

Omnata was co-founded in 2020 by Chris Chandler and Snowflake Data Superhero James Weakley with the goal to simplify integration. Omnata was one of the earliest Snowflake Native App partners, a top 10 Snowflake startup finalist in 2023, and winner of Snowflake's Data Cloud Product Monetization Partner of the Year award in 2024. Omnata's bidirectional connectors help customers to ingest data from SaaS apps and databases, as well as activate modeled data and drive actions in connected apps. The Snowflake Native App architecture saves customers time in procurement, breezes through cyber reviews, and reduces the overall cost of integration.



Qlik provides Snowflake customers with a scalable, cloud-independent solution that can find, transform, trust, analyze and act on their data at scale. Qlik and Snowflake together deliver a scalable, high-performance, real-time, end-to-end data integration and analytics cloud platform. By driving agility throughout the data and analytics process, Qlik and Snowflake help organizations close the gap across their data value chain by intelligently turning raw data into informed action. With automated data pipelines and modern, AI-powered analytics, Qlik and Snowflake accelerate the availability of information along with related insights that are currently trapped in legacy systems, warehouses or enterprise applications. Learn more at qlik.com.

Relational AI is one of the first knowledge graph coprocessors for the Snowflake AI Data Cloud. It enhances decision-making by bringing knowledge and business logic closer to data, using the same relational paradigm that organizations have relied on for decades. With Relational AI, customers can easily apply AI techniques, including graph analytics, rule-based reasoning, prescriptive analytics and predictive analytics to their data cloud, streamlining and enhancing every decision across the organization.

Get started with the Relational AI solution: Discovering Social Graph of Your Customers Using Relational AI and Snowflake [here >](#)

CONSENT MANAGEMENT

Ketch is next-generation privacy software designed for data-driven brands who refuse to rely on outdated tools. The Ketch data permissioning platform simplifies the complexity of privacy operations while enabling brands to mobilize responsibly gathered, permissioned data for growth. With prebuilt integration into Snowflake's data architecture, Ketch ensures that data privacy controls are embedded directly into the modern data stack, paving the way for AI initiatives. From capturing visitor privacy choices to enforcing consent signals across the business, Ketch provides the infrastructure, applications and APIs to enable a compliant, connected data strategy. Learn more at ketch.com.

OneTrust unlocks the full potential of data and AI, unifying data activation teams and data risk management teams, delivering complete context and control across all data and risk angles. With OneTrust, martech and data leaders can collect, centralize and activate purpose-based consent, automate privacy compliance, and deliver omni-channel experiences tailored to preferences. As a centralized consent system of record for modern marketing data stacks, OneTrust integrates with Snowflake to enforce and govern consent and preferences across multiple touchpoints. Learn more at onetrust.com.

Precise.ai has merged with Qonsent to transform digital advertising with an AI-powered platform that drives performance through high-quality data and privacy-centric audience targeting. By integrating with technologies for consent management, secure data collaboration and privacy preservation, Precise enables brands to improve ROAS while maintaining regulatory compliance and fair value exchange for data partners. Precise plans to list its custom audiences on Snowflake Marketplace to securely share this data directly to clients. These audiences will be IPs, IFAs and other privacy-compliant IDs. To learn more, visit precise.ai.

BUSINESS INTELLIGENCE

Since 2006, **Amazon Web Services** has been the world's most comprehensive and broadly adopted cloud. AWS has been continually expanding its services to support virtually any workload, and it now has more than 240 fully featured services for compute, storage, databases, networking, analytics, machine learning and artificial intelligence (AI), Internet of Things (IoT), mobile, security, hybrid, media, and application development, deployment and management from 105 Availability Zones within 33 geographic regions, with announced plans for 21 more Availability Zones and seven more AWS Regions in Malaysia, Mexico, New Zealand, the Kingdom of Saudi Arabia, Taiwan, Thailand and the AWS European Sovereign Cloud. Millions of customers – including the fastest-growing startups, largest enterprises and leading government agencies – trust AWS to power their infrastructure, become more agile and lower costs. To learn more about AWS, visit aws.amazon.com.

Domo puts data to work for everyone so they can multiply their impact on the business. Underpinned by a secure data foundation, Domo's cloud-native AI and data platform makes data visible and actionable with AI-powered dashboards and apps. Domo's integration with the Snowflake AI Data Cloud helps customers harness value from their Snowflake data through powerful data warehousing capabilities, efficient and scalable data transformation and analysis solutions as well as enhanced data accessibility and performance, all while maintaining visibility and control of data assets. Visit domo.com to learn more.

Get started with the Domo solution: Marketing Attribution and Media Mix Modeling with Snowflake Using Domo [here >](#)

With **Microsoft Power BI** in Microsoft Fabric, 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 one of the world's first Bitcoin development companies. The MicroStrategy software business develops and provides industry-leading AI-powered enterprise analytics software that promotes their vision of Intelligence Everywhere™. The flagship cloud-native BI platform, MicroStrategy ONE, is trusted by the most admired brands in the Fortune Global 500 to drive business agility, efficiency and revenue.

Omni enables fast, flexible data exploration and governed enterprise-wide analytics. Users access and analyze data with AI, Excel functions, no code and SQL – intuitive tools for marketing decision-makers and data teams to collaborate in one platform. Omni's built-in semantic layer means marketers can develop and iterate on key business metrics and create dashboards – without help from the data team and while assuring reporting consistency and governance.

Sigma's Google Analytics template leverages Snowflake's Connector for Google Analytics, empowering marketers to directly access and analyze vast amounts of raw data within the Snowflake AI Data Cloud. This integration enhances the Snowflake platform by enabling richer, more granular insights, allowing marketers to craft highly targeted campaigns and make data-driven decisions with greater precision and speed. Learn more at sigmacomputing.com/blog.

Get started with the Sigma solution: Analyze Google Analytics 4 (GA4) Data in Minutes Using Snowflake [here >](#)

Tableau is a leading AI-powered analytics platform. Offering a suite of analytics and business intelligence tools, Tableau turns trusted data into actionable insights so organizations can make better decisions every time.

ThoughtSpot is an AI-powered analytics company with a mission to create a more fact-driven world with an easy-to-use analytics platform. With ThoughtSpot, anyone can leverage natural language search powered by large language models to ask and answer data questions with confidence. Customers can take advantage of both ThoughtSpot's web and mobile applications to improve decision-making for every employee, wherever and whenever decisions are made. With ThoughtSpot's low-code developer-friendly platform, ThoughtSpot Everywhere, customers can also embed AI-powered analytics into their products and services, monetizing their data and engaging users to keep them coming back for more. Learn more at thoughtspot.com.

Get started with the ThoughtSpot solution: Supercharge Your Data Analytics with ThoughtSpot and Snowflake [here >](#)



APPENDIX

ADDITIONAL PARTNER CATEGORIZATION

While this report surfaces vendors by category according to Snowflake customer usage, a number of organizations in the modern marketing data stack serve many marketing and advertising needs. We asked our partners to identify any additional categories for which they provide solutions.

	Analytics and Data Capture	Enrichment and Hygiene	Identity and Onboarding	Customer Data Platforms	Marketing and Customer Engagement	Programmatic Solutions	Measurement and Optimization	Integration and Modeling	Consent Management	Business Intelligence
ADVERTY	✓							●		
AMPLITUDE	✓				●		●			
CONTENTSQUARE	✓									
FUNNEL	✓						●	●		
IMPROVADO	✓						●			
MIXPANEL	✓				●		●			●
PIANO	✓			●	●		●		●	
SNOWPLOW	✓						●	●		
SUPERMETRICS	✓							●		
AFFINITY SOLUTIONS	●	✓				●	●			●
CYBERSYN		✓								
DEEP SYNC		✓	●			●		●		
EQUIFAX		✓								●

KEY: ✓ Snowflake Modern Marketing Data Stack 2025 Category

● Additional Categories or Use Cases Supported by the Partner

Note: Each company self-selected the categories in the chart above. Snowflake did not designate these categorizations.



	Analytics and Data Capture	Enrichment and Hygiene	Identity and Onboarding	Customer Data Platforms	Marketing and Customer Engagement	Programmatic Solutions	Measurement and Optimization	Integration and Modeling	Consent Management	Business Intelligence
G2		✓			●					
IPINFO		✓								
S&P GLOBAL		✓								
SIMILARWEB	●	✓			●		●			●
WEATHER SOURCE	●	✓			●		●	●		●
ZOOMINFO		✓								
ACXIOM	●	●	✓				●			
AUDIENCE ACUITY		●	✓						●	
EXPERIAN		●	✓		●		●			
FULLCONTACT		●	✓		●		●			
LIVERAMP			✓		●		●			
MEDIAWALLAH INC.		●	✓							
MERKLE	●	●	✓	●	●		●			
TRANSUNION			✓							
TRUELTY			✓	●						
VERISK MARKETING SOLUTIONS		●	✓		●	●	●	●	●	●
ACQUIA				✓						
ACTIONIQ	●		●	✓	●					
AMPERITY	●	●	●	✓	●	●	●	●		●
CENSUS				✓	●			●		

KEY: ✓ Snowflake Modern Marketing Data Stack 2025 Category

● Additional Categories or Use Cases Supported by the Partner

Note: Each company self-selected the categories in the chart above. Snowflake did not designate these categorizations.



	Analytics and Data Capture	Enrichment and Hygiene	Identity and Onboarding	Customer Data Platforms	Marketing and Customer Engagement	Programmatic Solutions	Measurement and Optimization	Integration and Modeling	Consent Management	Business Intelligence
GROWTHLOOP	•			✓	•		•			
HIGHTOUCH	•	•	•	✓			•			•
RUDDERSTACK	•			✓						
SIMON DATA	•	•	•	✓	•	•	•	•		
TEALIUM				✓						
TWILIO SEGMENT	•		•	✓	•				•	
ADOBE	•			•	✓	•	•			
ATTENTIVE					✓					
BRAZE					✓					
CORDIAL				•	✓					
HUBSPOT					✓					
ITERABLE					✓					
MESSAGEGEARS				•	✓					
OPTIMOVE					✓					
SALESFORCE					✓					
ZETA GLOBAL	•	•	•	•	✓	•		•		•
CHALICE						✓		•		
FREEWHEEL						✓				
MAGNITE						✓				
OPENX						✓				

KEY: ✓ Snowflake Modern Marketing Data Stack 2025 Category

● Additional Categories or Use Cases Supported by the Partner

Note: Each company self-selected the categories in the chart above. Snowflake did not designate these categorizations.



	Analytics and Data Capture	Enrichment and Hygiene	Identity and Onboarding	Customer Data Platforms	Marketing and Customer Engagement	Programmatic Solutions	Measurement and Optimization	Integration and Modeling	Consent Management	Business Intelligence
SHARETHROUGH		●			●	✓				
STACKADAPT						✓				
THE TRADE DESK	●		●			✓	●	●		
ADIMPACT	●	●					✓			●
APPSFLYER	●	●	●	●			✓			●
COMSCORE		●	●		●	●	✓			●
EPPO				●			✓			●
ISPOT							✓			
KUMO					●		✓			
NIELSEN	●						✓			
OPTIMIZELY	●				●		✓			
ROCKERBOX	●						✓	●		●
VIDEOAMP							✓			
AIRBYTE	●							✓		
ALTERYX	●	●						✓		●
COALESCE								✓		
DATAIKU								✓		
DBT LABS								✓		
FIVETRAN								✓		
HEX	●							✓		●

KEY: ✓ Snowflake Modern Marketing Data Stack 2025 Category

● Additional Categories or Use Cases Supported by the Partner

Note: Each company self-selected the categories in the chart above. Snowflake did not designate these categorizations.



	Analytics and Data Capture	Enrichment and Hygiene	Identity and Onboarding	Customer Data Platforms	Marketing and Customer Engagement	Programmatic Solutions	Measurement and Optimization	Integration and Modeling	Consent Management	Business Intelligence
INFORMATICA	●			●	●			✓		
MATILLION	●	●		●	●			✓		●
OMNATA								✓		
QLIK	●						●	✓		●
RELATIONAL.AI	●	●		●	●		●	✓		●
KETCH									✓	
ONETRUST									✓	
PRECISE.AI	●		●	●	●				✓	
AMAZON QUICKSIGHT										✓
DOMO								●		✓
MICROSOFT POWER BI										✓
MICROSTRATEGY										✓
OMNI										✓
SIGMA COMPUTING										✓
TABLEAU										✓
THOUGHTSPOT	●									✓



Snowflake makes enterprise AI easy, efficient and trusted. Thousands of companies around the globe, including hundreds of the world's largest, use Snowflake's AI Data Cloud to share data, build applications, and power their business with AI. The era of enterprise AI is here.

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



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