

Now Tech: Identity Resolution, Q3 2020

Forrester's Overview Of 28 Identity Resolution Providers

by Joe Stanhope
September 24, 2020

Why Read This Report

B2C marketers leverage identity resolution to improve consumer data management, better personalize customer engagement, and gain insights and efficiencies through measurement. But to realize these benefits, you'll first have to select from a diverse set of vendors that vary by size, functionality, geography, and vertical market focus. B2C marketers should use this report to understand the value they can expect from an identity resolution provider and to select one based on size and functionality.

Key Takeaways

Power Moments-Based Marketing With Identity Resolution

Identity resolution solutions allow marketers to connect consumer contextual, behavior, and enterprise information to better target, personalize, and measure marketing and advertising.

Select Vendors Based On Size And Functionality

Forrester identified four key segments in the identity resolution landscape based on functionality and the use cases they support.

Establish An Identity Resolution Roadmap

B2C marketers must establish a clear identity resolution roadmap. From here, they can develop capabilities that match their maturing use case requirements and accommodate changing market conditions.

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Power Moments-Based Marketing With Identity Resolution

B2C marketers see identity resolution as the foundation for understanding their target customers and reaching them in the right moments. But the growth of touchpoints and devices, data sources, and marketing and advertising technologies leaves marketers with a fragmented landscape from which to build an accurate and complete view of the customer. And recent industry developments such as the deprecation of third-party cookies by Google and identifier for advertisers (IDFA) by Apple will require marketers to take new approaches to collecting and assembling data for audience building, activation, and measurement.¹ Marketers can combat ecosystem complexity and futureproof their customer engagement efforts by leveraging the data, technology, and processes that comprise identity resolution to address their business objectives. Forrester defines identity resolution as:

The process of integrating identifiers across available touchpoints and devices with behavior, transaction, and contextual information into a cohesive and addressable consumer profile for marketing analysis, orchestration, and delivery.

Identity resolution encompasses a wide range of capabilities that support an equally diverse set of marketing use cases. These include the targeting, personalization, and measurement of both known and pseudonymous audiences in the digital and offline worlds. B2C marketers who leverage identity resolution can:

- › **Improve customer data management.** Identity resolution allows marketers to connect the full range of contextual, behavioral, and enterprise data sources to build complete and accurate customer profiles.² Ultimately, this helps marketers develop the data quality and scale to target and activate the audiences that matter to them.
- › **Personalize customer engagement more effectively.** Identity resolution allows marketers to link systems of insight and engagement to apply data and insights for more personalized interactions.³ A consistent set of identifiers ensures that content, experience, and channel selection incorporate context and preferences.
- › **Gain insights and efficiencies through measurement.** Identity resolution allows marketers to track consumer interactions across touchpoints to holistically understand campaign performance and customer needs. Identity resolution is a central building block for unified measurement that attributes marketing performance to cross-channels.⁴

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Select Vendors Based On Size And Functionality

We've based our analysis of the identity resolution market on two factors: market presence and functionality.

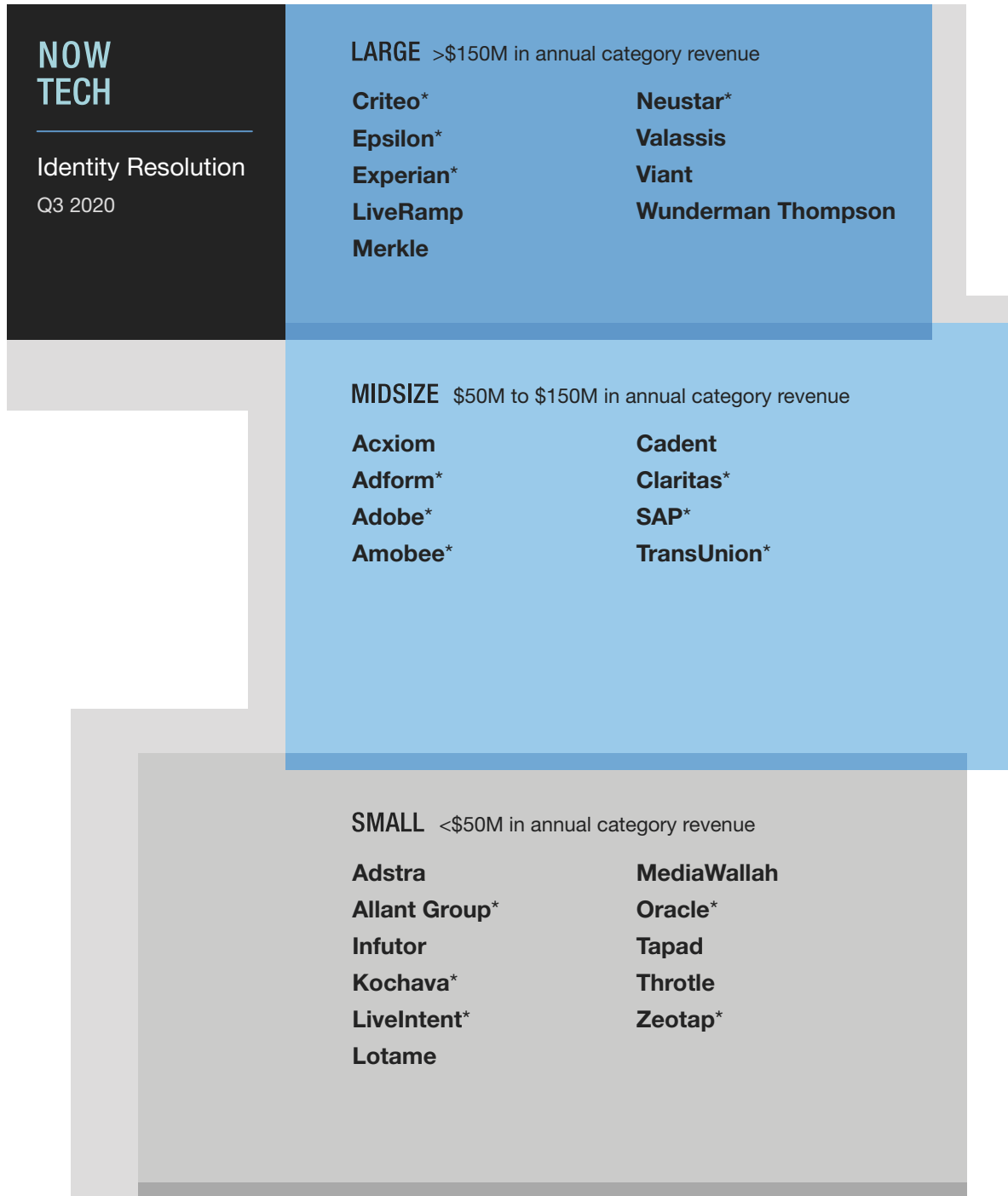
Identity Resolution Market Presence Segments

We segmented the vendors in this market into three categories, based on identity resolution revenue: large established players (more than \$150 million in identity resolution revenue), midsize players (\$50 million to \$150 million in revenue), and smaller players (less than \$50 million in revenue) (see Figure 1).

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FIGURE 1 Now Tech Market Presence Segments: Identity Resolution, Q3 2020



*Forrester estimate

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Identity Resolution Functionality Segments

To explore functionality at a deeper level, we broke the identity resolution market into four segments, each with varying capabilities (see Figure 2 and see Figure 3):

- › **Onboarding helps brands extend customer engagement.** Solutions in this category help marketers make offline, known customer data available for online marketing engagement.⁵ These services extend customer relationship management (CRM) efforts into digital media by matching known customer IDs with pseudonymous online identifiers. Beyond the basic targeting and remarketing use cases, marketers can leverage onboarding to link audiences with purchases and suppress audiences from campaigns.
- › **First-person PII identity helps brands build a complete view of the customer.**⁶ Solutions in this category manage the identities of known consumers based on personally identifiable, deterministic data such as names, postal addresses, and email addresses. These vendors typically offer a proprietary, persistent identifier created from a compiled reference database of known consumer IDs, current and historical personal data, and other attributes from third-party sources. These persistent identifiers help marketers link all customer records across the enterprise, including sales, marketing, and service.
- › **Digital identity helps brands target and personalize across online channels.** Solutions in this category connect pseudonymous consumer data stemming from digital data management use cases. Marketers rely on these solutions to build anonymized consumer profiles through both deterministic and probabilistic matching techniques. Marketers can address consumers at the anonymous user, household, or device level to track activity across touchpoints, personalize interactions, and measure performance across digital and advertising channels.
- › **Embedded digital identity helps brands activate digital campaigns.** Solutions in this category offer digital identity in tandem with marketing and advertising activation capabilities, such as a demand-side platform. Successful digital marketing requires robust identity resolution to develop and execute precise and scaled campaigns. Marketers benefit from identity resolution in the context of these solutions by building audiences, look-alike modeling, and media activation in digital, display, and advanced TV channels.⁷

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FIGURE 2 Now Tech Functionality Segments: Identity Resolution, Q3 2020, Part 1



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FIGURE 3 Now Tech Functionality Segments: Identity Resolution, Q3 2020, Part 2



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Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, and vertical market focus (see Figure 4, see Figure 5, and see Figure 6).

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FIGURE 4 Now Tech Large Vendors: Identity Resolution, Q3 2020**LARGE** >\$150M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Criteo	Embedded digital identity; onboarding	NA 30%; LATAM 10%; EMEA 40%; APAC 20%*	Retail; travel; classified*	Accent Group; Allergy Buyers Club; Sephora
Epsilon	Digital identity; first-person PII identity; onboarding; embedded digital identity	NA 95%; EMEA 4%; APAC 1%	Retail; financial services; automotive	Bank of America; Cabela's; Signet
Experian	First-person PII identity; digital identity	NA 63%; LATAM 14%; EMEA 23%	Retail; financial services; media and publishing	Foursquare; Inscope; Samsung Ads
LiveRamp	Digital identity; onboarding; first-person PII identity	NA 93%; EMEA 5%; APAC 2%	Information technology; agencies; retail	Gannett; Publicis; Samsung
Merkle	First-person PII identity; digital identity; onboarding	NA 77%; EMEA 20%; APAC 3%	Financial services and insurance; retail; technology	EmblemHealth; Orvis; Subaru
Neustar	First-person PII identity; digital identity; onboarding	NA 85%; LATAM 3%; EMEA 10%; APAC 2%	Consumer packaged goods (CPG) and retail; financial services; media and entertainment	Capital One; Coca-Cola North America; The Home Depot
Valassis	Digital identity; first-person PII identity	NA 100%	Grocery and drug; restaurant; CPG	Clorox; Publix Super Markets; Subway
Viant	Embedded digital identity	NA 100%	Auto; healthcare; CPG	Havas; Matterkind; Merkle
Wunderman Thompson	First-person PII identity; digital identity; onboarding	NA 67%; LATAM 4%; EMEA 27%; APAC 2%	Healthcare and insurance; telecom and media; travel	GroupM; United Health Group; Verizon

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 5 Now Tech Midsize Vendors: Identity Resolution, Q3 2020**MIDSIZE** \$50M to \$150M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Acxiom	First-person PII identity; digital identity	NA 96%; EMEA 3%; APAC 1%	Financial services; retail; insurance/healthcare	Citi; Physicians Mutual; Southwest Airlines
Adform	Embedded digital identity	NA 16%; LATAM 1%; EMEA 77%; APAC 6%	Telecom and communications; finance and insurance; automotive	IKEA; SKY; Vodafone
Adobe	Embedded digital identity	NA 58%; EMEA 27%; APAC 15%	Retail; financial services industry; media and entertainment	NFL; Sprint; SunTrust Bank
Amobee	Embedded digital identity	NA 42%; EMEA 18%; APAC 40%	CPG; retail; auto	H&L; Kraft Starcom; MolsonCoors
Cadent	Embedded digital identity; onboarding	NA 95%; EMEA 5%	Media; CPG/retail; finance	NBC; Tegna/Premion; TransUnion
Claritas	Digital identity	NA 100%	Resellers; financial services; print media	Asurion; Epsilon
SAP	First-person PII identity	NA 40%; LATAM 6%; EMEA 45%; APAC 9%	Retail; CPG; media and communications	BCD Travel; Nestlé; News DNA
TransUnion	First-person PII identity; digital identity	NA 100%	Media; financial services; insurance	Vendor did not disclose

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FIGURE 6 Now Tech Small Vendors: Identity Resolution, Q3 2020**SMALL** <\$50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Adstra	First-person PII identity; digital identity	NA 100%	Agencies/information service providers	Allant
Allant Group	First-person PII identity	NA 100%	Insurance; media and publishing; retail	Vendor did not disclose
Infutor	First-person PII identity; digital identity	NA 100%	Information services and analytics; adtech; financial services and subprime	Caliber Home Loans; Kohler; Moët Hennessey
Kochava	Embedded digital identity	NA 40%; EMEA 30%; APAC 30%*	Entertainment media; fintech; travel and hospitality	CBS Interactive; Choice Hotels; WeatherBug
LiveIntent	Embedded digital identity; onboarding	NA 100%	E-commerce; content and publishing; automotive	Vendor did not disclose

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 6 Now Tech Small Vendors: Identity Resolution, Q3 2020 (Cont.)**SMALL** <\$50M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Lotame	Embedded digital identity	NA 49%; LATAM 9%; EMEA 20%; APAC 22%	Media; technology; CPG	Bloomberg; Empower Agency; Omnicom Media Group
MediaWallah	Digital identity; onboarding	NA 99%; APAC 1%	Financial services; software; media	Adobe; V12 Data
Oracle	Embedded digital identity; first-person PII identity	NA 40%; LATAM 20%; EMEA 20%; APAC 20%*	Retail; financial services; travel and hospitality*	Vendor did not disclose
Tapad	Digital identity; onboarding	NA 65%; EMEA 20%; APAC 15%*	Technology; CPG; direct-to-consumer (DTC)	Comcast; Foursquare; The Trade Desk
Throttle	Onboarding; digital identity; first-person PII identity	NA 100%	Healthcare; retail; automotive	Aetna; Nielsen; The Trade Desk
Zeotap	Digital identity	NA 30%; LATAM 10%; EMEA 40%; APAC 20%*	Retail; CPG; financial services*	Mercedes-Benz; Red Bull; Unilever

*The vendor did not provide information for this cell; this is Forrester's estimate.

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Recommendations

Establish An Identity Resolution Roadmap

B2C marketers vying for consumer attention must deliver relevant and personalized interactions. Identity resolution is the first step to achieving that goal. But, as this report details, there are multiple flavors of identity resolution. In addition, there are many vendors that support multiple categories of identity resolution functionality. In order to focus on the vendor best suited to solving specific marketing priorities, firms should define their use cases within an identity resolution roadmap to determine the right solution configuration. With this roadmap in hand:

- › **Select a cornerstone ID resolution vendor.** A cornerstone identity resolution vendor should support mission-critical use cases and supply the foundation for the identity solution across current and future categories. As ambition grows and use cases expand, firms will add vendors with complementary or enhanced capabilities to this initial investment. An effective identity resolution roadmap will define the priorities, resources, and interoperability required to fully leverage and build upon the cornerstone vendor's capabilities over time.
- › **Look for depth of capability as you set out.** Vendors make many claims, so marketers must ask thorough, probing questions, speak to satisfied customers, and require proof-of-concept tests to measure the vendor's performance, precision, and scale. You can't accept incomplete due diligence; cutting corners puts you at risk of failure and endangers customer relationships.
- › **Consider vendors with experience in your vertical market.** You'll shorten your learning curve when you work with partners that have industry expertise: They know the challenges within markets, can appreciate marketers' goals, understand market-specific data collection and activation rules and regulations, and can deliver solutions within reasonable expectations. Just check that there are no potential conflicts of interest in your chosen vendor's client base before choosing.
- › **Continuously reassess the strategy and roadmap.** The data, privacy, and marketing ecosystem is extremely dynamic, putting identity resolution efforts in a constant state of flux. Third-party cookie and mobile ad ID deprecation drastically impact identity resolution. Marketers must proactively calculate how industry changes impact identity resolution and marketing efforts, evaluate current partners' ability to accommodate changes, and consider alternative providers and approaches.

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Supplemental Material

Market Presence Methodology

We defined market presence in Figure 1 based on product revenue.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

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Endnotes

- ¹ Source: Tina Moffett, David Novitzky, Joanna O'Connell, Fatemeh Khatibloo, and Stephanie Liu, "Marketers, You Might Hate Abiding By New Data Restrictions, But Doing Nothing Isn't An Option," Forrester Blogs, February 5, 2020 (<https://go.forrester.com/blogs/marketers-you-might-hate-abiding-by-new-data-restrictions-but-doing-nothing-isnt-an-option/>) and "Marketers Face Further Data Deprecation Challenges In Addition To The Death Of The Third-Party Cookie," Forrester (<https://www.forrester.com/fn/2Nt7oBoGsaaN3WA63c7PxH>).
- ² See the Forrester report "[The Strategic Role Of Identity Resolution.](#)"
- ³ See the Forrester report "[How To Build A Moments-Based Marketing Ecosystem.](#)"
- ⁴ See the Forrester report "[Customer-Obsessed Marketing Demands Unified Measurement.](#)"
- ⁵ See the Forrester report "[Making The Most Of Customer Data Onboarding.](#)"
- ⁶ PII stands for personally identifiable information.
- ⁷ Advanced TV is an umbrella term for a collection of television touchpoints including OTT (over-the-top), addressable, and connected TV.

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