



The CDP Report 2025



Introduction

The world's appetite for data is insatiable. Every second, billions of clicks, swipes, and transactions create an unrelenting flow of information that defines how businesses operate and how customers interact.

In 2025, everything is connected—streaming platforms track every click and pause to refine their algorithms, smart devices monitor homes and cities around the clock, and retailers analyze trillions of transactions every day to anticipate the next customer need. Entire industries are being reshaped by this flood of data, yet many businesses are still grappling with the same challenge: how to turn raw data into real value.

This isn't a new story. For years, companies have recognized that customer data holds the key to competitive advantage. But what's changed is the sheer scale and complexity of the problem. Collecting data is no longer the hard part. Now, it's about making sense of it, acting on it in real time, and ensuring it's done responsibly.

TABLE OF CONTENTS

Methodology	4	Screenmaps & Heat Recording: Illuminating customer experiences	30
Key Findings	5	Customer Success: Elevating support to drive retention	33
Top Categories on the Twilio Segment Platform	6	CRM: Turning customer data into lasting relationships	36
Analytics: Smarter customer insights	12	Predictive Traits: Anticipate your customers' needs	39
Warehouses: Don't fall for the false binary	16	Building a future fueled by customer data	41
Advertising: Privacy-first engagement	21		
Raw Data: Empowering flexibility and customization	24		
Email Marketing: Check your inbox	27		

The Customer Data Platform (CDP) sits at the center of this shift. Once considered just another tool in the stack, it's evolved into the nerve center of how companies engage with their customers. It bridges the gap between data warehouses, analytics platforms, and front-line tools, turning fragmented data streams into unified insights. Over the past decade, we've seen CDPs go from an emerging category to a critical piece of infrastructure for businesses large and small.

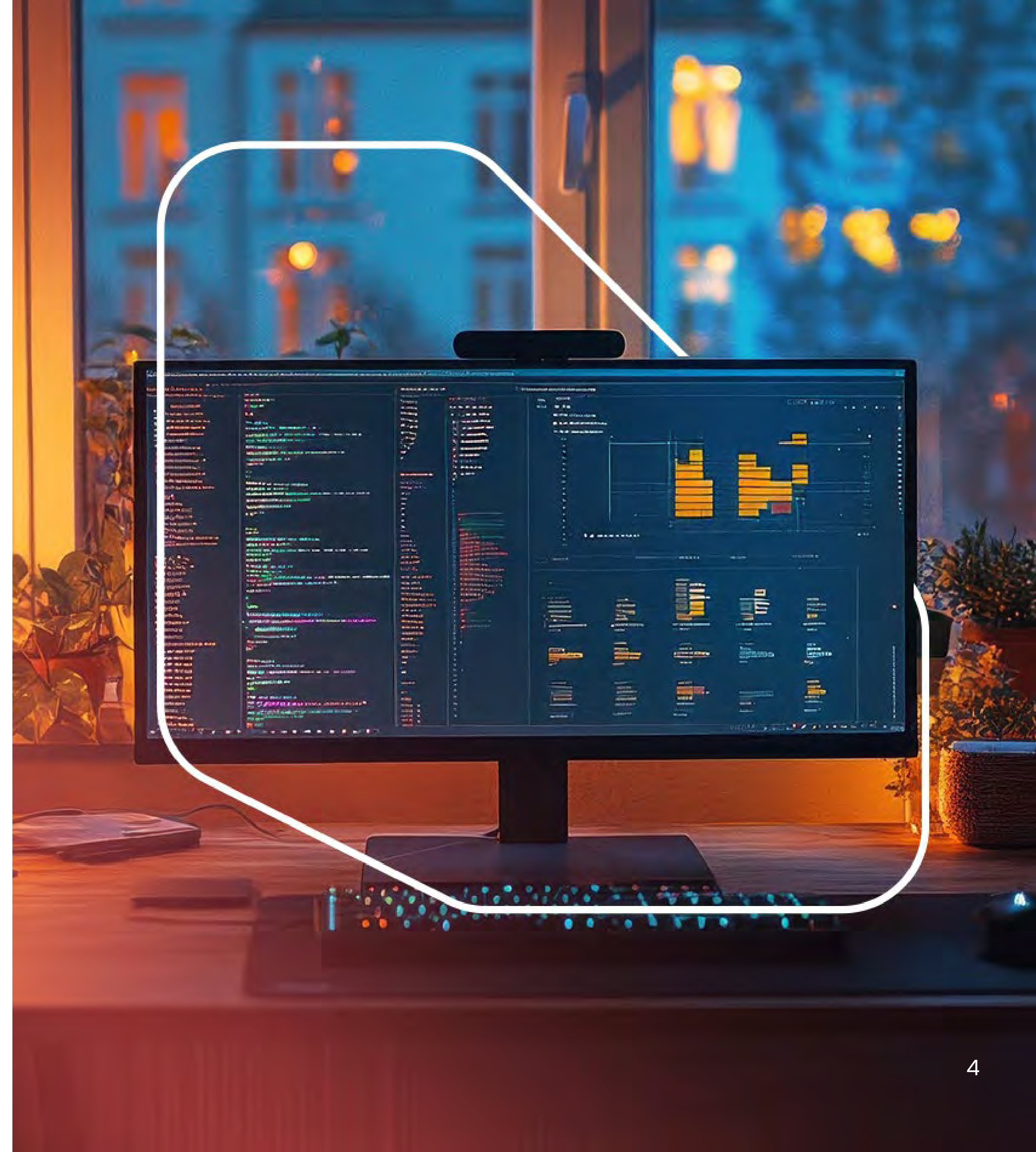
This report is your guide to navigating this pivotal moment. Drawing on anonymized insights from thousands of Twilio customers, we'll explore how companies are using CDPs to unlock the power of their data. We'll examine the trends shaping the ecosystem, and highlight the tools driving us forward.

The stakes are clear: data is everywhere, and the companies that learn how to wield it effectively are the ones that will shape the future. Let's explore how they're doing it.



Methodology

- All data is sourced from aggregated, anonymized usage data from Twilio customers (11/01/23 - 11/01/24).
- **Metrics:** Adoption rates, growth trends, and usage volumes across key destination categories.
- **Categories Analyzed:** Analytics, Advertising, CRM, Customer Success, Email, Raw Data, Warehouses, Predictive Traits



Key Findings

1. Interoperability is the Key to Martech Success

- **Finding:** Businesses are increasingly moving away from monolithic platforms toward composable tech stacks, where tools integrate seamlessly. This approach gives businesses the freedom to connect and cultivate the apps that work best for their unique needs, fostering innovation and flexibility.

2. Data Warehouses and CDPs are Better Together

- **Finding:** Over the past year, Twilio customers synced nearly **10 trillion rows of data** to cloud data warehouses like Databricks, Snowflake and BigQuery. While warehouses are indispensable for storing and managing large-scale datasets, their true value is unlocked when integrated with a CDP. Together, they enable businesses to combine historical data from systems of record like CRM, POS or Support with real-time event data, driving deeper customer insights and enabling precise, personalized experiences.

3. Analytics Remains a Powerhouse

- **Finding:** Analytics tools are the most connected category on the Twilio platform, highlighting their importance in understanding customer behavior. Businesses that integrate analytics with a CDP are unlocking smarter, real-time decision-making and enhanced engagement.

4. The growth of predictive AI

- **Finding:** Last year Twilio launched Predictive Traits to help businesses leverage machine learning to identify future behaviors. Usage grew a remarkable 57% year over year.



10 trillion rows of data synced to cloud warehouses in 2024

Top Categories on the
**TWILIO SEGMENT
PLATFORM**

01



Customer expectations are evolving, and with them, so are the tools businesses use to meet those expectations. On the Twilio Segment platform, trillions of data points flow through integrations spanning analytics, advertising, customer success, personalization, and more. Each integration represents a strategic investment in delivering seamless, data-driven customer experiences.

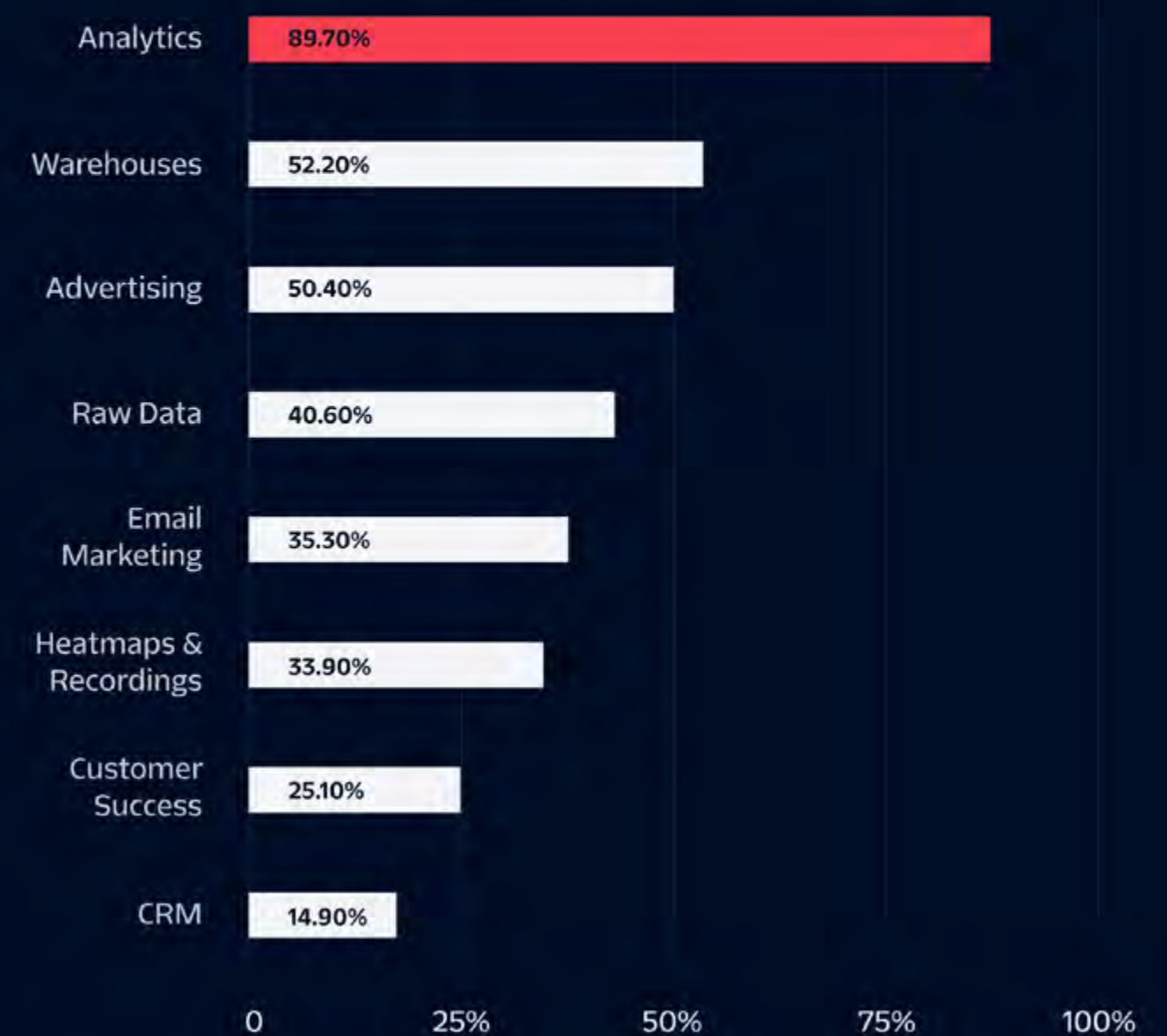
But what makes some categories rise to the top? To understand this, we need to examine the forces driving tech stack decisions—and why integration has emerged as the linchpin of the modern tech stack.

The top destination categories

The most popular categories connected to the Twilio Segment platform reflect how businesses are prioritizing their resources to create more personalized, efficient, and connected experiences.

- 1. Analytics:** Tools like Google Analytics Amplitude, and Mixpanel provide the foundational insights businesses need to understand customer behavior and measure the success of their strategies.
- 2. Warehouses:** Cloud data warehouses like Databricks and BigQuery serve as the system of record for storing and scaling customer data across teams, while providing a space to build audiences and train ML models with trusted customer data.
- 3. Advertising:** Platforms like Meta Ads , LinkedIn, and Google Ads rely on Twilio to power robust campaigns with first-party data for precision targeting.

Top Destination Categories on the Twilio Segment Platform



4. **Raw Data:** Businesses export data to storage solutions like Amazon S3 to enable custom applications and maintain flexibility in their data strategy.
5. **Email Marketing:** Tools like Braze, Customer.io, and Iterable help businesses drive personalized, direct engagement through email campaigns.
6. **Heatmaps & Recordings:** Platforms like Hotjar and FullStory provide visual insights into customer behavior on websites and apps.
7. **Customer Success:** Tools like Zendesk and Gainsight help businesses proactively improve customer retention and satisfaction.
8. **CRM:** Platforms like Intercom, HubSpot, and Salesforce empower teams to track interactions, manage pipelines, and deliver personalized engagement across the customer lifecycle

These categories represent the most connected tools, accounting for the majority of data flowing across the platform. Beyond this, they serve as the backbone of how businesses operationalize customer data to improve engagement and drive growth.



Why focus on the top eight categories?

There's no denying that every category on the Twilio Segment platform plays a role in creating a robust data ecosystem. However, this report focuses on the top eight categories because they are the most widely adopted and have the greatest influence on how businesses build composable tech stacks.

As Chris Koehler, Chief Marketing Officer at Twilio, explains, **integration capabilities** are no longer just a “nice to have”—they’re a business-critical requirement. In a world where businesses are shifting from monolithic platforms to composable stacks, the ability of tools to connect seamlessly has become the **second-biggest driver of martech replacement decisions**, trailing only cost.

This shift is reshaping how organizations prioritize their tech investments. Categories like analytics, warehouses, and advertising dominate not just because they are widely used but because they integrate effortlessly into broader ecosystems. These tools power the foundation of composable architectures, where businesses can assemble best-in-class solutions tailored to their customer’s needs rather than being locked into a single, proprietary suite.

Integration or extinction

The explosion of MarTech tools over the past decade has created a paradox: while there is a push toward consolidation, the reality is that businesses are using more tools than ever to meet specific, critical needs. Integration has become the connective tissue that holds these stacks together, enabling businesses to leverage specialized tools while maintaining a seamless flow of data.



MarTech is a vast and growing industry with thousands of players, and some level of consolidation is always in the air. Now, a recent string of mergers and acquisitions has everyone's antennae up. Uniphore acquired ActionIQ, Contentstack acquired Lytics, and Rokr revealed their merger with mParticle - all deals announced within weeks of each other, all centering around the acquisition of a customer data platform.

These moves signal a growing recognition that customer data is at the core of modern marketing technology. But, consolidation alone doesn't solve the complexity businesses face in managing their stacks.

What these recent acquisitions have really done is just create new point solutions, tying the CDP to a specific application or channel, which is limiting by definition.

Instead, a customer data platform should be part of an open architecture, seamlessly integrating communications channels, data sources, and AI capabilities, with the flexibility to add on custom solutions. This is how you create seamless, unified customer experiences at every touchpoint

Twilio's recent membership in the MACH Alliance underscores its commitment to enabling composable, open, and future-proof architectures. The MACH (Microservices, API-first, Cloud-native, and Headless) framework represents a best-in-class standard for building modular tech stacks. By joining the alliance, Twilio signals its alignment with principles of flexibility and interoperability—values that are critical as businesses seek to adapt to the evolving customer data landscape.



However, not all integrations are created equal. Many large suites promise interoperability, but fall short due to fragmented data models and limited documentation, leaving businesses to rely on expensive custom integrations. By contrast, Twilio's platform is designed with openness at its core, ensuring that businesses can connect tools without friction and unlock the full potential of their data.

In the sections ahead, we'll explore how these top categories are evolving, which tools are leading the charge, and what trends are shaping the future of customer engagement. Together, they tell a story of how businesses are building not just technology stacks, but seamless systems designed to grow, adapt, and thrive.



ANALYTICS:

Smarter Customer Insights

02



Analytics have long been essential to understanding customer behavior and measuring success. Early leaders like Google have historically dominated the scene, offering businesses the ability to track web traffic and user interactions. But the digital world has changed dramatically—customer journeys now span multiple platforms, privacy regulations are reshaping data practices, and businesses need more than just surface-level metrics to stay competitive.

With customers engaging across a growing number of channels, businesses need a comprehensive view of their interactions. At the same time, privacy regulations like Apple's deprecation of Identifier for Advertisers (IDFA) have forced a shift toward first-party data and event-based tracking. The result is a reimagined analytics landscape where businesses must go beyond surface-level metrics and embrace deeper, more actionable insights.



Our data

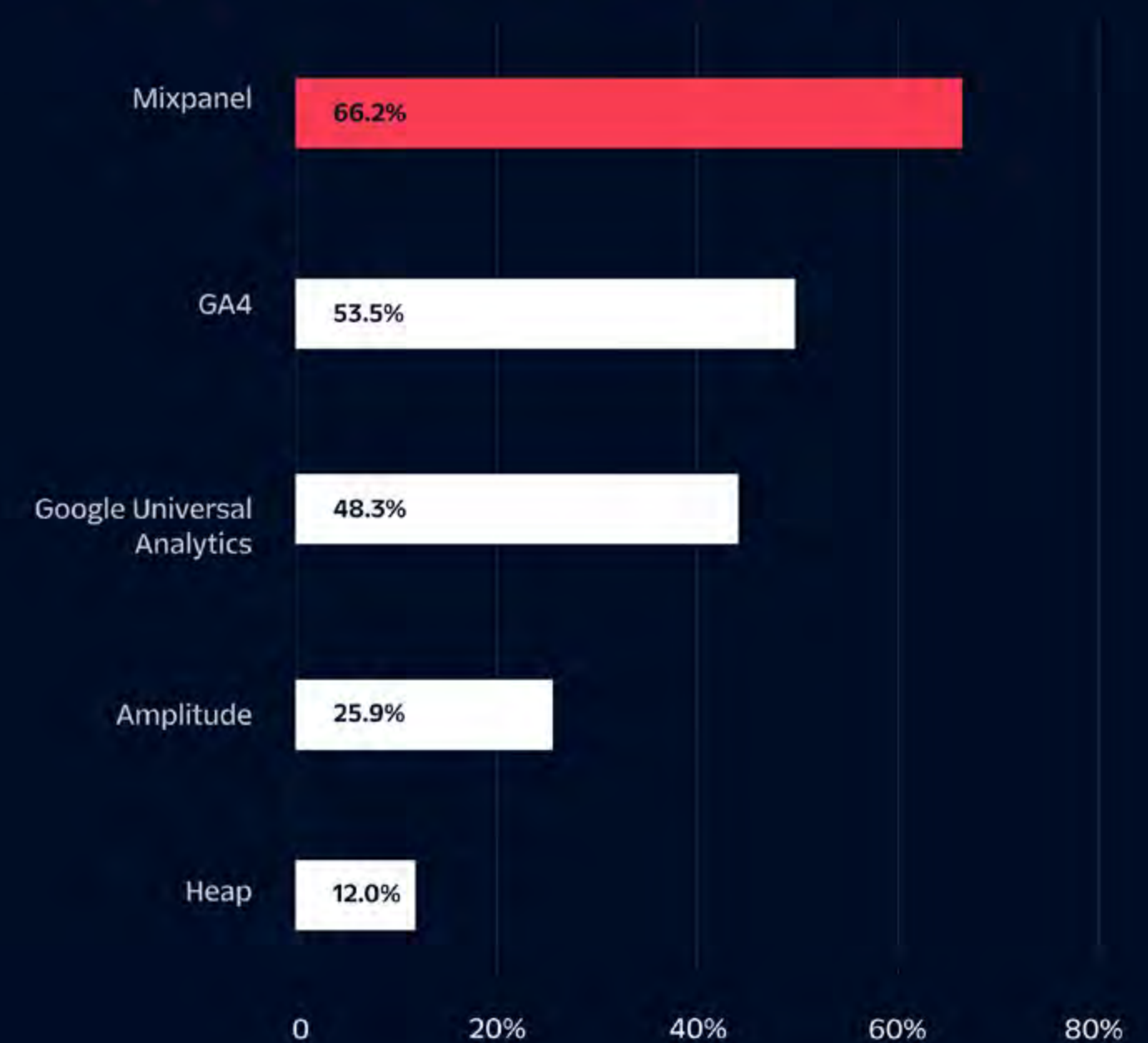
Analytics remains the most widely adopted destination category on the Twilio Segment platform, underscoring its critical role in modern customer engagement strategies. This year, Mixpanel leads the pack, connected by 66.2% of Twilio users, solidifying its dominance as a top choice for businesses focused on product analytics and behavioral insights.

Meanwhile, Google Analytics 4 (GA4) continues its rapid adoption, now used by 53.5% of Twilio customers, as businesses adapt to an event-based, privacy-first approach to tracking. While GA4 is gaining ground, Google Universal Analytics (UA) is still actively connected by 48.3% of users—though its phase-out has pushed many companies to accelerate their migration strategies.

Further down, Amplitude (25.9%) and Heap (12.0%) maintain strong footholds in product and digital experience analytics. The rising adoption of Mixpanel and Amplitude reflects a broader shift toward product-led growth strategies, where businesses prioritize deep behavioral insights to optimize customer engagement.

A CDP enriches analytics platforms with unified, real-time customer profiles, allowing businesses to go beyond passive reporting—enabling smarter audience segmentation, real-time activation, and continuous experimentation to drive growth.

Top Analytics Destinations by Customer Usage %



What's driving growth

The rise of analytics tools like GA4, Amplitude, and Mixpanel can be attributed to three key trends:

- 1. The shift to privacy-first tracking:** With the stricter privacy regulations, tools like GA4 have adopted event-based tracking that respects user privacy while maintaining actionable insights.
- 2. The need for product intelligence:** Businesses are looking beyond marketing metrics to understand how users engage with their products. Amplitude and Mixpanel excel at delivering these granular insights.
- 3. Real-time decision-making:** Integrating analytics with a CDP like Twilio allows businesses to activate data in real time, powering experiments, personalization, and customer engagement strategies

The bottom line

Once upon a time, you might be thrilled if an Analytics tool could tell you where your traffic comes from—now you can understand your customers deeply and act on that understanding. As consumers grow wearier of intrusive marketing practices, the focus is shifting from mere reporting to driving growth and loyalty.

By integrating these analytics tools with a CDP, businesses can not only track customer behavior but also turn those insights into impactful actions. The future of analytics is here, and it's smarter, more customer-centric, and ready for a privacy-first world.



WAREHOUSES:

Don't fall for the false binary

03



Data warehouses have become indispensable in the era of big data, serving as centralized repositories where vast amounts of structured and unstructured data are stored and managed. They enable organizations to consolidate information from various sources, providing a unified view that supports advanced analytics, business intelligence, and informed decision-making.

But their role has evolved. No longer just repositories for historical data, modern cloud-based warehouses like Databricks, Snowflake, BigQuery, and Redshift are now designed to handle real-time data processing, enabling businesses to power advanced analytics and machine learning models at scale.

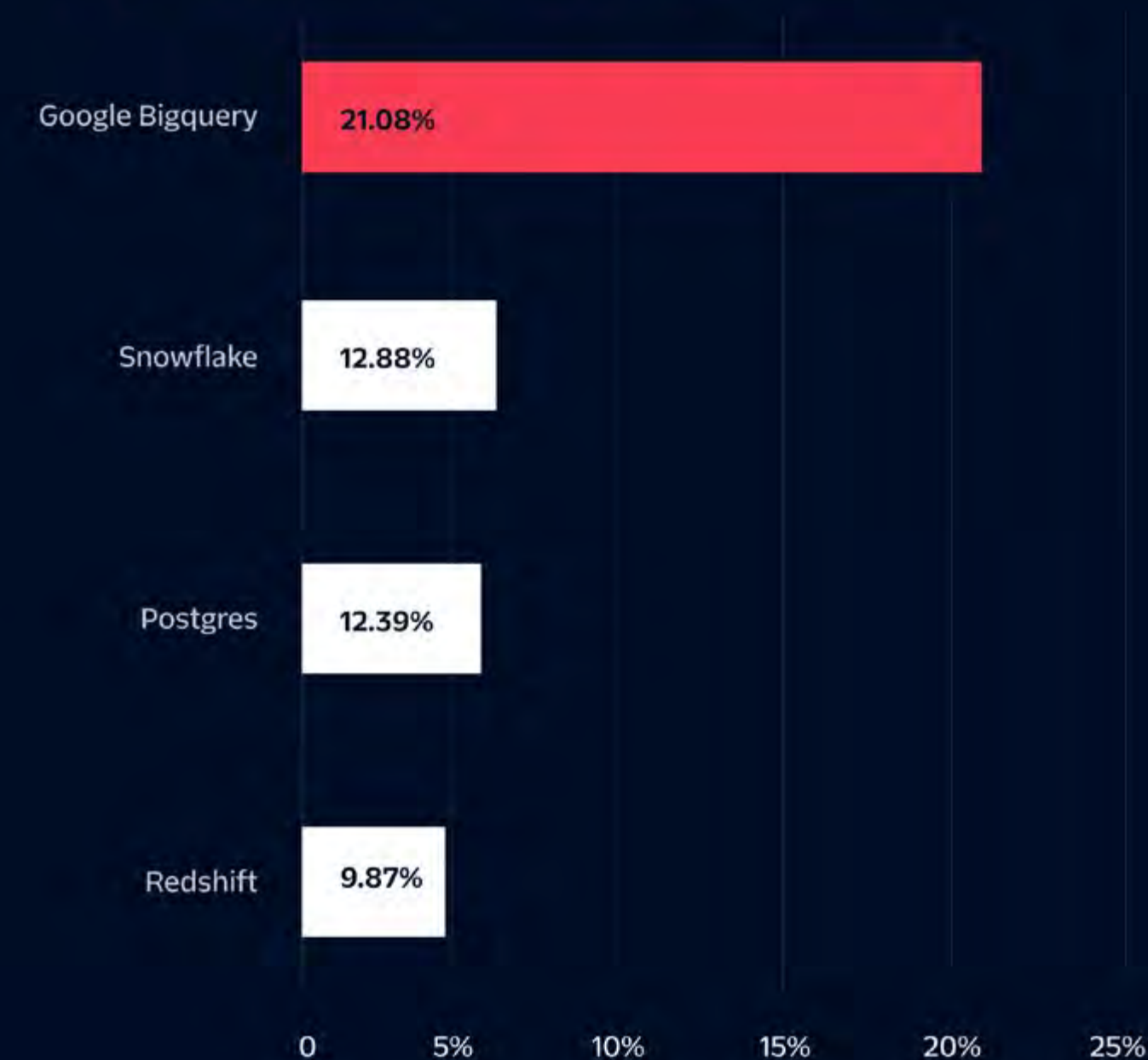
Despite their power, warehouses were never designed to solve every data challenge alone. They excel at organizing and storing data but rely on integrations with other tools to activate that data and make it actionable across marketing, sales, and customer support. This is where Customer Data Platforms like Twilio come into play, bridging the gap between raw data storage and business activation.

Our Data

Warehouses are the second most popular destination category on our platform, reflecting their foundational role in modern customer data strategies. Over the past year, our customers synced nearly 10 trillion rows of data to cloud warehouses, highlighting the massive scale of data being consolidated and activated.

While the sheer volume of data is impressive, it's the way businesses are using this data that stands out. By connecting their warehouses to a CDP, organizations are blending historical records stored in their warehouses with real-time event data from their CDP. This combination enriches unified customer profiles, enables precise audience segmentation, and powers real-time personalization.

Top Warehouse Destinations By Customer Usage %



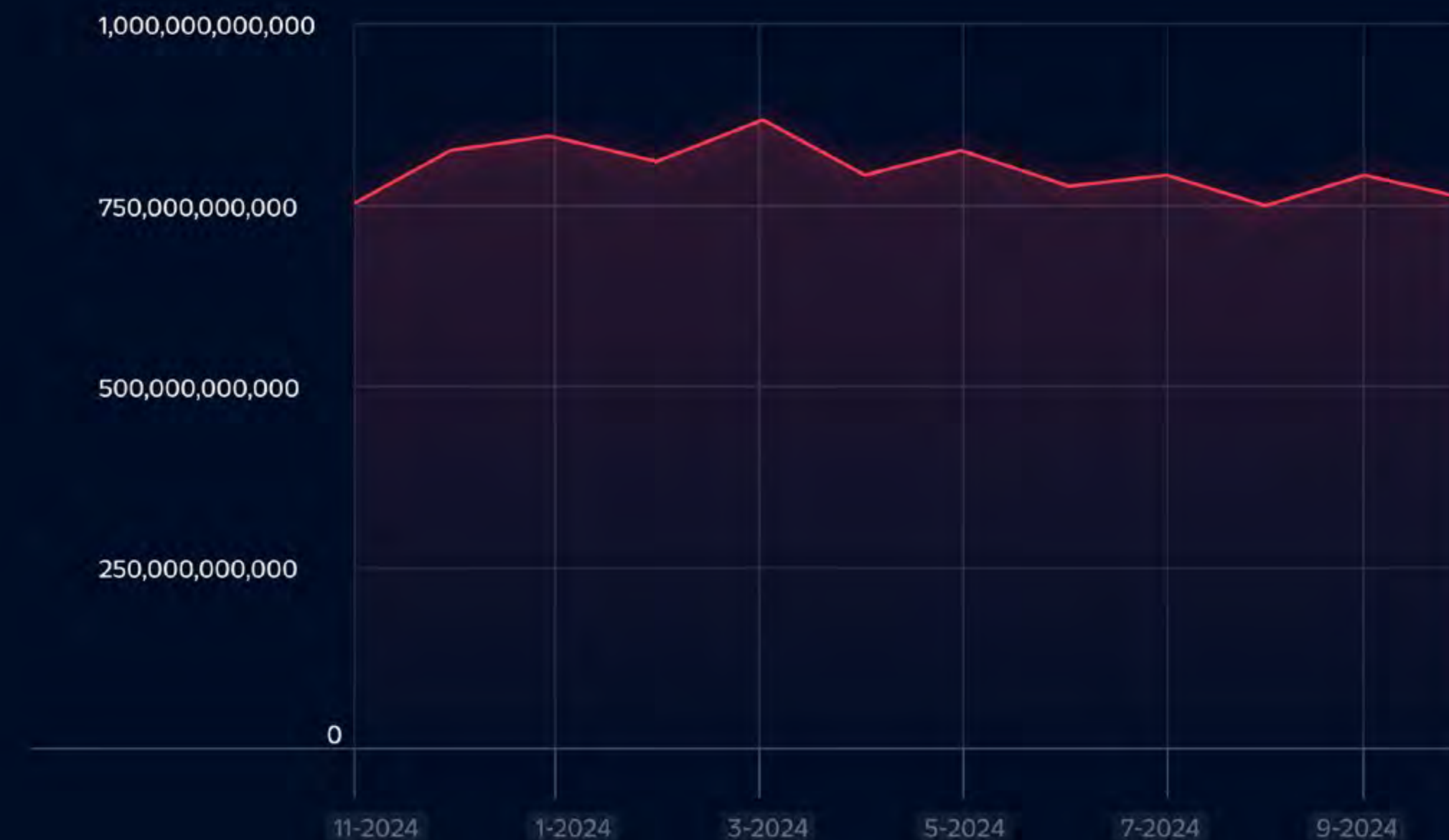
Breaking the false binary

There's often a misconception in the data world that businesses must choose between a data warehouse and a CDP—a false binary that creates unnecessary friction. The truth is, warehouses and CDPs are not competitors; **they are complementary.**

The role of the data warehouse is to act as the system of record, providing a central repository for structured and unstructured data. But warehouses are not optimized for real-time activation or the complexities of downstream customer engagement. That's where CDPs shine.

CDPs take the clean, organized data from a warehouse and make it actionable. They enable teams to sync unified customer profiles to marketing, analytics, and support tools in real time, unlocking use cases that would be impossible with a warehouse alone.

Rows of Data Synced to Cloud Warehouse 2024



Why the pairing matters

The partnership between a warehouse and a CDP allows businesses to:

- 1. Unify real-time and historical data:** Combine clickstream data with long-term purchase histories for deeper insights.
- 2. Scale personalization:** Deliver tailored experiences across channels by syncing customer profiles directly to ad platforms, CMS platforms, email tools, or CRMs.
- 3. Enable data access for non-technical teams:** CDPs empower marketers, sales teams, and support agents with actionable data, without requiring SQL expertise or custom engineering.



What's driving growth

1. **Composable architectures:** As businesses adopt modular tech stacks, warehouses provide the foundation, while CDPs tend to handle activation.
2. **Privacy and compliance:** Warehouses centralize data securely, while CDPs like Twilio ensure compliance in how data is used across tools.
3. **Real-time needs:** When customers expect an immediate response, the CDP-warehouse combination enables businesses to meet these expectations.

The bottom line

Warehouses are essential for consolidating and managing large-scale datasets, but their value multiplies when paired with a CDP. Together, they enable businesses to not only understand their customers but also act on that understanding in real time.

This false binary of “warehouse or CDP” overlooks the immense potential of their integration. By embracing both, businesses can unify their data strategy, improve customer engagement, and deliver measurable results at scale.



ADVERTISING:

Privacy-first Engagement

04



Advertising has always been one of the most dynamic and high-stakes areas of the customer data ecosystem. For years, the ability to leverage third-party cookies defined how brands connected with audiences. From precise targeting to complex attribution models, third-party data was the foundation of digital advertising as we knew it.

But change has been brewing. The shift away from third-party cookies—initiated by browsers like Safari and Firefox—has redefined the advertising landscape. In their place, first-party data has emerged as the new currency of trust and performance.

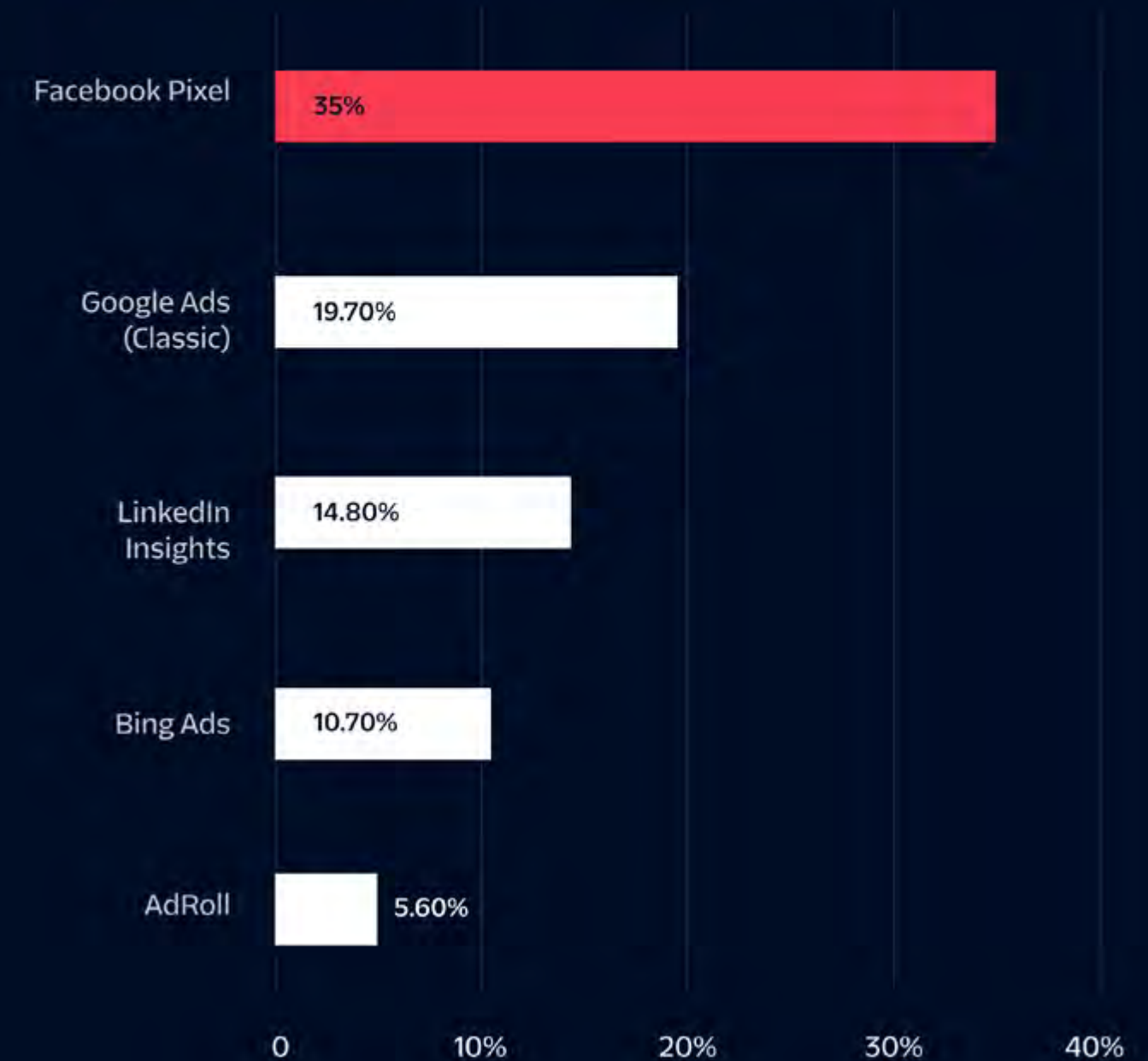
For advertisers, this is both a challenge and an opportunity. They must rebuild their strategies around data that's ethically sourced and tightly connected to their own ecosystems. CDPs are at the center of this transformation, enabling brands to harness first-party data for precision targeting while ensuring compliance with evolving privacy standards.

Our Data

On the Twilio Segment platform, advertising remains the third most popular destination category. Privacy-focused tools like Meta's Conversions API and Google Ads continue to see strong adoption, with customers leveraging them to create campaigns rooted in trust and transparency.

The transition is clear: businesses that integrate their CDP with advertising platforms report **higher Return on Ad Spend (ROAS)** and better audience engagement. By syncing unified profiles to ad tools in real-time, brands are unlocking more accurate targeting and personalized messaging—without relying on cookies.

Top Advertising Destinations By Customer Usage %



What's driving growth

The ecosystem is shifting rapidly:

- 1. First-party data strategies:** As third-party tracking fades, brands are prioritizing customer data collected directly through their own channels. CDPs play a critical role in connecting this data to advertising platforms for activation.
- 2. AI-driven audience modeling:** Advanced algorithms are replacing cookie-based segmentation with predictive audience modeling powered by first-party data. This ensures that advertisers can still reach the right people, with the right message, at the right time.
- 3. Privacy compliance as a differentiator:** Consumers are increasingly aware of data privacy, and companies that invest in privacy-first strategies are gaining an edge in trust and brand loyalty.

The bottom line

Advertising is entering a new era, one where privacy and performance are no longer at odds. Businesses that embrace CDP-powered first-party data strategies are not only future-proofing their campaigns but also building deeper, more sustainable relationships with their customers.



RAW DATA:

Empowering flexibility
and customization

05



Raw data destinations play a unique role in the customer data ecosystem. Unlike analytics or advertising platforms, which often transform data into specific insights or actions, raw data destinations serve as a flexible, unprocessed repository. These tools give businesses complete control over how they store, process, and analyze their data, empowering them to build bespoke solutions tailored to their unique needs.

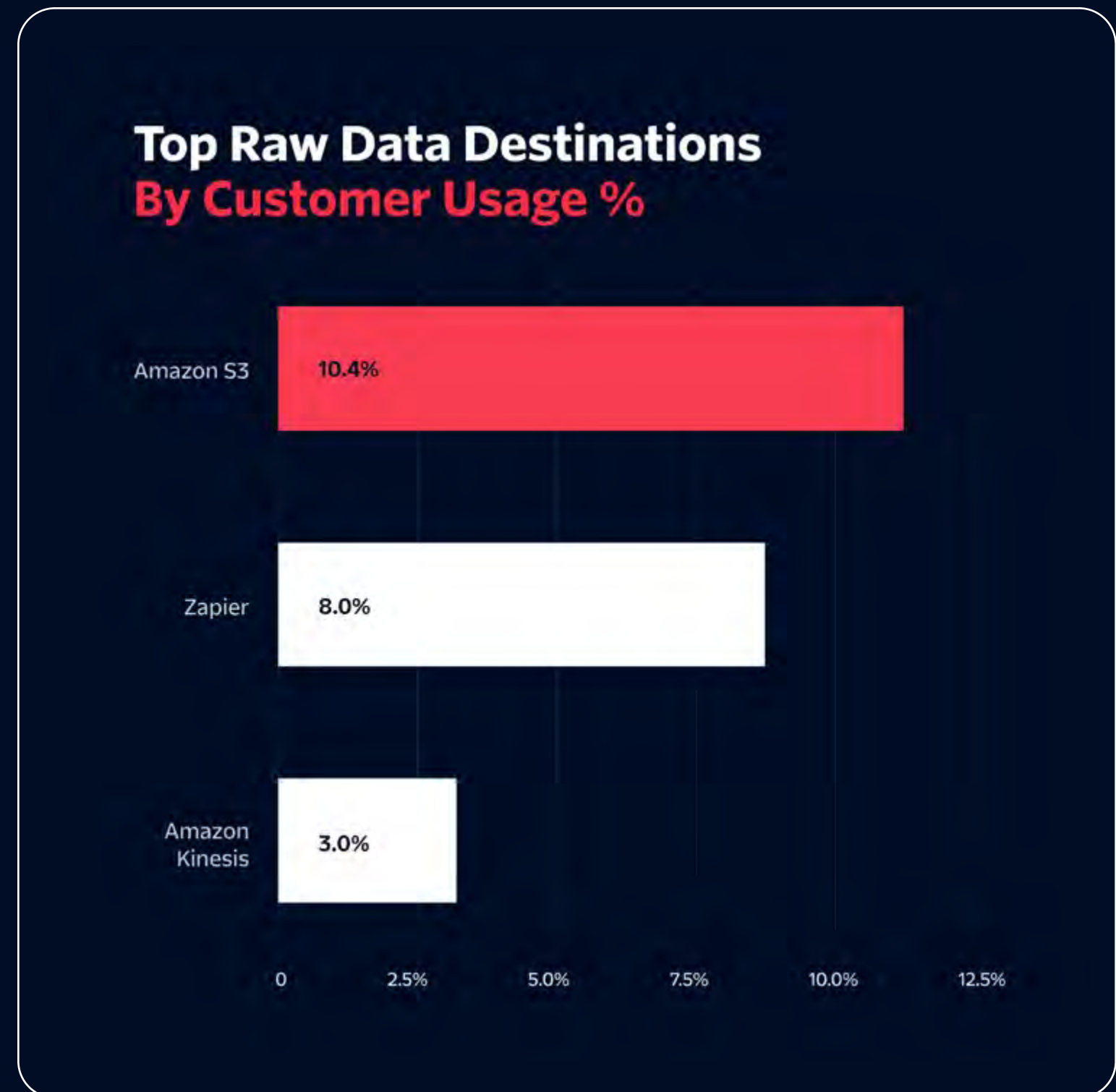
Raw data storage is critical for organizations that want to maintain flexibility in their tech stacks, especially for advanced use cases like machine learning, predictive modeling, and custom application development. By exporting raw, untransformed data, businesses ensure they have the foundation needed for innovation without being constrained by the limitations of predefined tools or structures

Our Data

Amazon S3 leads the pack as the most popular raw data destination, reflecting its dominance in cloud storage. Its scalability, reliability, and cost-effectiveness make it an ideal choice for businesses of all sizes looking to centralize raw data for processing and storage.

In second place is **Zapier**, a tool that simplifies the process of exporting raw data and connecting it with other applications. While Zapier doesn't store raw data in the traditional sense, its ability to automate workflows and move data between tools makes it an attractive option for businesses looking to operationalize raw data quickly.

These tools are used by businesses across industries for diverse purposes, including creating custom dashboards, enabling data science workflows, and ensuring compliance by maintaining raw data archives. The combination of Twilio's real-time data streaming and these destinations gives companies a robust foundation for operationalizing their data however they see fit.



What's driving growth

- 1. Custom application development:** Raw data destinations like S3 allow businesses to export unprocessed data for building applications that require unique processing pipelines or advanced machine learning capabilities.
- 2. Flexibility in tech stack design:** As organizations adopt composable architectures, raw data destinations ensure that businesses aren't locked into specific tools and can create custom workflows tailored to their needs.
- 3. Compliance and retention:** With increasing privacy regulations, raw data storage allows companies to maintain complete records for audits or regulatory reviews while controlling how and when the data is processed.

The bottom line

Raw data destinations are essential for businesses that value flexibility and control over their data. Whether it's building custom models, maintaining compliance, or integrating data into proprietary workflows, these tools empower teams to innovate beyond the capabilities of traditional, pre-built platforms.

When integrated with Twilio, raw data destinations become even more powerful, enabling businesses to stream unprocessed data in real-time while maintaining the ability to customize their data pipelines. For companies looking to future-proof their data strategies, investing in raw data destinations is a critical piece of the puzzle.



EMAIL MARKETING:

Check your inbox

06



Email marketing is still one of the **most effective channels** for engaging customers directly. Despite the rise of newer communication platforms, email continues to drive measurable results in building relationships, nurturing leads, and retaining customers. Its enduring popularity is due to its versatility—businesses can use email for everything from transactional messages to personalized promotions.

As customer expectations for personalization and relevance grow, email marketing tools have evolved to meet these demands. Modern platforms integrate deeply with CDPs like Twilio, enabling businesses to send targeted, behavior-based messages that are tailored to each customer’s journey. In this way, email has transformed from a static communication tool into a dynamic channel for personalized engagement at scale.

Our Data

Customer.io is the most popular email marketing destination connected to our platform. Known for its robust automation capabilities and seamless integration with Twilio, Customer.io allows businesses to send highly personalized messages triggered by real-time events. It’s particularly popular with growth-focused teams that prioritize agility and precise targeting.



Mailchimp, with its commanding second-place position, remains a favorite for businesses of all sizes. Its user-friendly interface and extensive feature set make it an excellent choice for companies looking to combine ease of use with powerful marketing capabilities. Mailchimp's dominance also reflects its reputation as one of the most established and widely recognized email marketing platforms.

Both tools highlight different strengths: Customer.io is a leader in automation and real-time messaging, while Mailchimp excels at providing accessible, intuitive email marketing for a broader audience. When paired with Twilio, these platforms unlock even greater potential, enabling teams to leverage unified customer profiles for tailored email campaigns that drive engagement and ROI.

What's driving growth

- 1. Personalization at scale:** Email marketing tools like Customer.io, Mailchimp, and Iterable thrive because they enable businesses to deliver personalized messages based on real-time customer behaviors and preferences.
- 2. Automation and efficiency:** Modern email platforms automate complex workflows, allowing businesses to set up journeys and trigger messages with minimal manual effort.

- 3. Proven ROI:** Email remains one of the most cost-effective channels, consistently delivering high returns compared to other digital marketing efforts.

The bottom line

Although the first marketing email was sent in the 1970s (**yes, really**) it's still thriving in the age of social media and messaging apps. Platforms like Customer.io and Mailchimp lead the way, helping businesses leverage the power of email to deliver personalized, automated, and impactful communications.

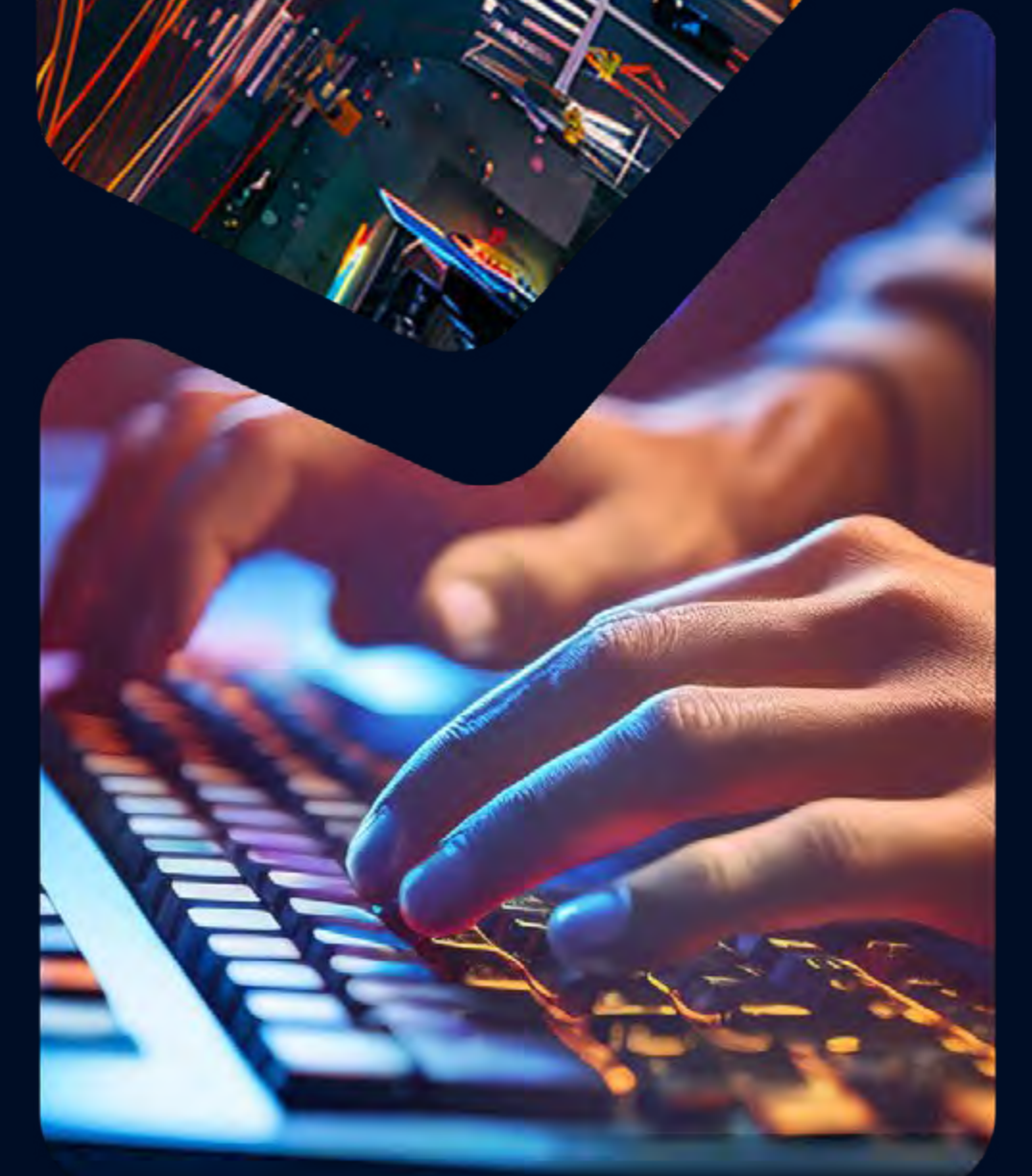
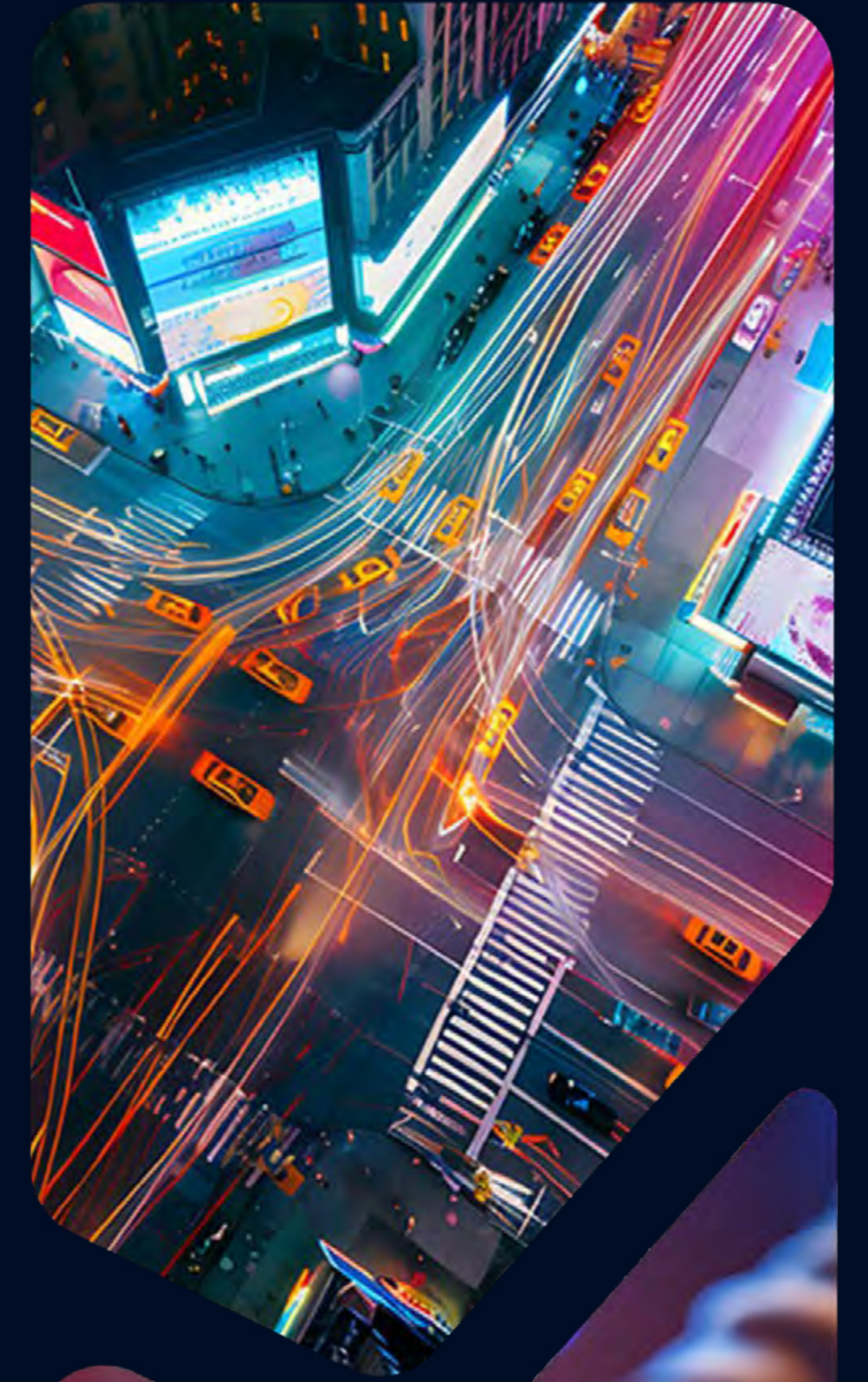
When integrated with Twilio, these tools become even more effective, turning unified customer data into the foundation for campaigns that drive real results. Email marketing continues to be an indispensable part of any data-driven engagement strategy, providing a direct line to customers and measurable value for businesses.



SCREENMAPS & HEAT RECORDING:

Illuminating customer
experiences

07



Understanding how customers interact with your website or app is critical to optimizing the digital experience. While traditional analytics platforms provide metrics like page views or bounce rates, they often fail to capture the nuances of user behavior. Heatmaps and session recording tools fill this gap by offering a visual, granular view of how customers navigate digital interfaces.

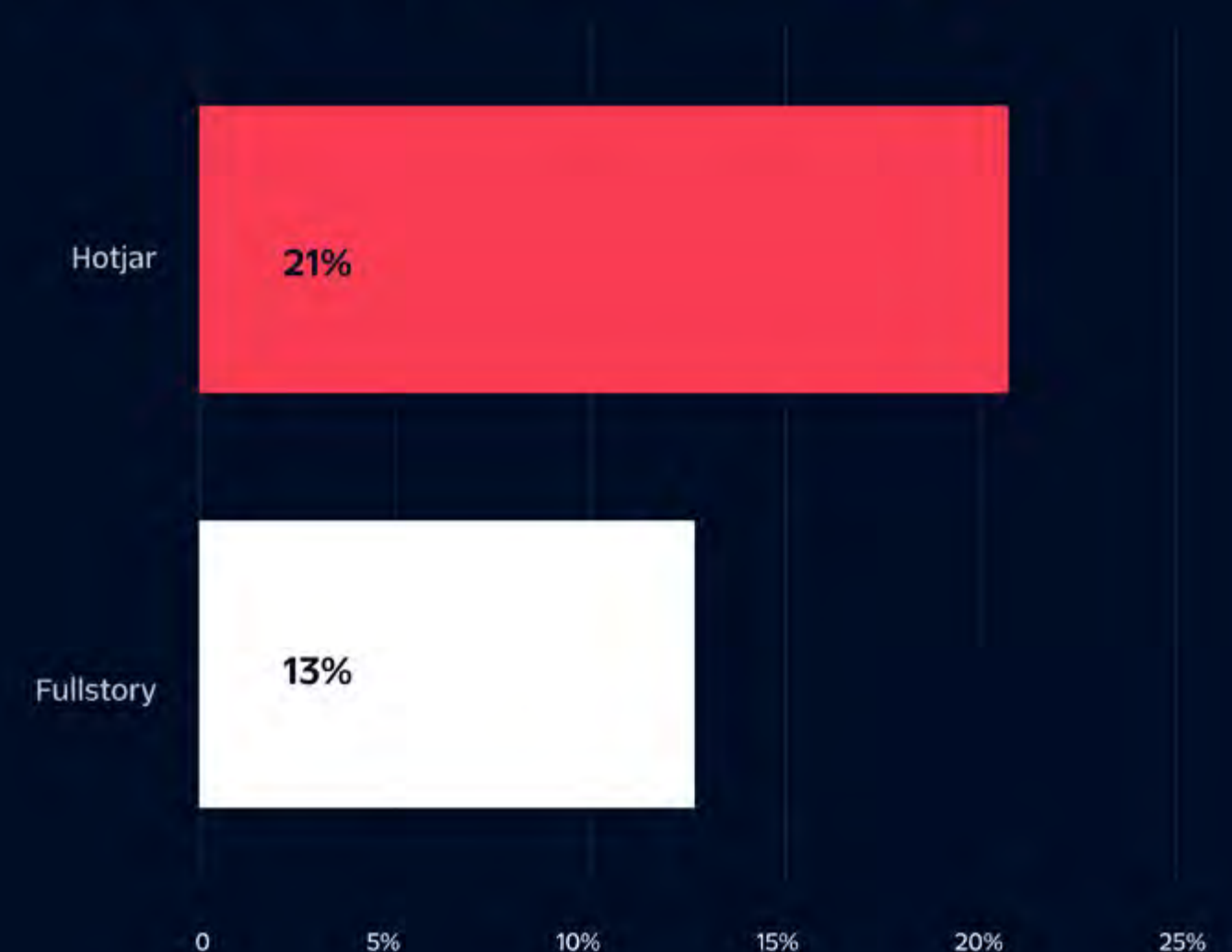
By showing where users click, scroll, or drop off, these tools help teams identify friction points, uncover usability issues, and prioritize design improvements. Whether it's understanding why users abandon a checkout flow or discovering which parts of a landing page attract the most attention, heatmaps and recordings provide actionable insights that drive better user experiences.

Our Data

On the Twilio Segment platform, **Hotjar** is the top destination in this category, with **FullStory** following as a strong second.

Both tools are invaluable for teams aiming to bridge the gap between data and design. By integrating with Twilio, they gain access to unified customer profiles, enabling teams to layer behavioral data with other customer insights. This integration helps businesses move from understanding “what” happened to “why” it happened, allowing them to prioritize impactful changes.

Top Heatmap & Screen Recording Destinations **By Customer Usage %**



What's driving growth

- 1. Customer-centric design:** Businesses are investing more in understanding the customer journey to reduce friction and improve conversion rates. Heatmaps and session recordings provide the qualitative data needed to complement quantitative analytics.
- 2. Increasing complexity in digital experiences:** As apps and websites grow more sophisticated, understanding how users interact with these interfaces has become a top priority for product, marketing, and design teams.
- 3. Actionable insights at speed:** Tools like Hotjar and FullStory enable rapid testing and iteration, making it easier for teams to adapt to customer needs without lengthy development cycles.

The bottom line

Heatmaps and session recording tools like Hotjar and FullStory are indispensable for businesses that want to deliver exceptional digital experiences. By providing a window into how users engage with websites and apps, these tools empower teams to make informed decisions that enhance usability and drive results.

When paired with a CDP, heatmaps and recording platforms become even more powerful. Teams can combine behavioral insights with broader customer data, creating a full picture of how individual users interact across touchpoints. For businesses focused on improving their digital experiences, investing in tools like Hotjar and FullStory is a no-brainer.



CUSTOMER SUCCESS:

Elevating support
to drive retention

08



Customer success tools play a pivotal role in fostering loyalty and retention by helping businesses proactively support their customers. While support platforms were historically reactive—focused on resolving tickets and addressing complaints—modern customer success solutions take a broader, more strategic approach. They enable businesses to monitor customer health, predict churn, and deliver personalized experiences that build lasting relationships.

As customer expectations **reach an all-time high**, businesses recognize that success doesn't stop at the point of purchase. Retaining customers and driving long-term value requires a deep understanding of their needs and behaviors, along with the tools to act on those insights in real time.

Our Data

On the Twilio Segment platform, Zendesk dominates the customer success category by a significant margin, reflecting its status as the market leader. Its robust ticketing, live chat, and knowledge base capabilities make it the go-to solution for businesses prioritizing operational efficiency and customer satisfaction.

While SatisMeter and Helpscout offer strong alternatives, particularly for smaller teams or businesses seeking more specialized solutions, Zendesk's comprehensive suite of features and enterprise-grade scalability have helped it secure its leading position.

When connected to Twilio, Zendesk gains an additional edge: access to unified customer profiles that enhance support interactions with rich, real-time data. Support agents can instantly see a customer's purchase history, behavioral patterns, and past interactions, enabling faster resolutions and more personalized service.

Top Customer Success Destinations By Customer Usage %



What's driving growth

- 1. Customer retention as a priority:** With acquisition costs rising, businesses are shifting their focus toward retaining existing customers. As a result, proactive engagement is integral to improving satisfaction and reducing churn.
- 2. Integrated service experiences:** Customers expect seamless transitions between channels, whether they're interacting through email, chat, or phone. Zendesk, for instance, excels in enabling omnichannel support.
- 3. Data-driven service:** The integration of customer success tools with CDPs like Twilio empowers teams to deliver contextual, personalized support by syncing unified data into their workflows.

The bottom line

Customer success has evolved from a support function to a strategic driver of long-term business value. Zendesk's market dominance reflects its ability to adapt to this shift, offering the tools businesses need to build deeper connections with their customers.

When paired with Twilio, Zendesk becomes even more impactful, enabling businesses to leverage real-time data to enhance service and engagement. In a competitive marketplace where customer experience is a key differentiator, investing in customer success tools like Zendesk is a clear path to driving retention, loyalty, and growth.



CRM:

Turning customer data into lasting relationships

09



Customer Relationship Management (CRM) tools have evolved far beyond their origins as digital rolodexes. In the past, CRMs were primarily used to store customer contact information and track sales opportunities. Today, they are central to how businesses manage their entire customer lifecycle—from lead generation to long-term loyalty.

Customers now expect brands to remember their preferences, respond quickly to inquiries, and provide tailored recommendations. To meet these expectations, CRMs have integrated more deeply with marketing, support, and automation tools. They've become the connective tissue between teams, ensuring a cohesive view of every customer interaction.

Our Data

CRM remains one of the most popular destination categories on the platform, with some surprising trends in adoption.

Leading the pack, Intercom has gained favor for its conversational approach to CRM. It combines messaging, engagement, and customer support into one intuitive platform, making it a favorite among fast-growing businesses and mid-sized teams. A close second, HubSpot is valued for its all-in-one approach, offering marketing automation, sales tracking, and CRM tools in a single interface. Its strong focus on ease of use makes it an attractive choice for teams looking to consolidate their tech stack.

Despite being a household name in the CRM space, Salesforce comes in third. Its powerful features and deep customization capabilities remain a draw for enterprises, but its complexity and reliance on proprietary systems can limit flexibility.

With Twilio's integrations, however, businesses can use any CRM to go beyond tracking customers. Unified customer profiles enhance segmentation and personalization efforts, while real-time data syncs power more effective automation and engagement strategies.



What's driving growth

1. **Conversational tools at scale:** Intercom's success underscores a shift toward real-time, personalized engagement. Customers want to feel heard and responded to in the moment, and CRMs are evolving to meet that need.
2. **Integrated ecosystems:** Businesses value CRMs that seamlessly connect with other tools, from marketing platforms to support systems, enabling a holistic customer view.
3. **Simplifying complexity:** Tools like HubSpot are growing rapidly because they provide robust features without overwhelming teams, striking a balance between functionality and usability.

The bottom line

CRMs play a vital role in how businesses build and maintain relationships with their customers. Intercom's conversational focus, HubSpot's all-in-one simplicity, and Salesforce's enterprise-grade capabilities highlight the range of options available to meet diverse business needs.

When paired with Twilio, CRMs transform from organizational tools into strategic assets, helping businesses deliver tailored experiences at scale. The ability to turn real-time data into meaningful action is what sets successful CRM strategies apart.



PREDICTIVE TRAITS:

Anticipate your customers'
needs

10



Last year, Twilio launched Predictive Traits, a leap forward in how businesses leverage customer data to drive engagement. By using machine learning to identify future behaviors, such as likelihood to churn or intent to purchase, Predictive Traits allow companies to act with foresight rather than hindsight. These insights help businesses not only understand their customers better but also deliver hyper-relevant, timely experiences that deepen loyalty and drive growth.

Our Data

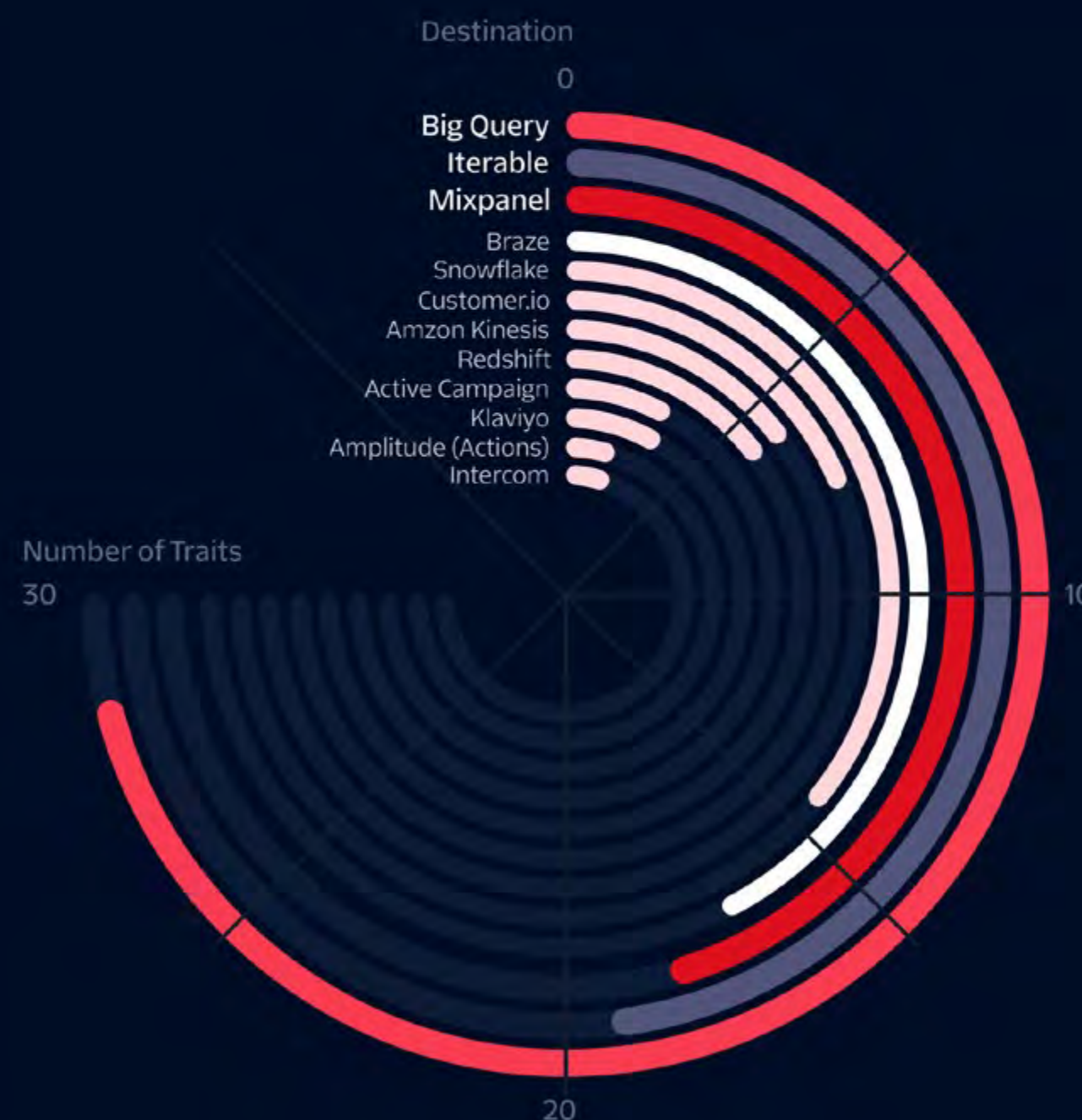
In 2024, Predictive Traits on the Twilio Segment platform grew significantly, with a remarkable 57% increase year over year. Out of these, 24% were connected to destinations, showing how businesses are integrating predictive insights into their broader engagement strategies.

Twilio's Predictive Traits are most commonly synced with platforms like **BigQuery**, **Iterable**, and **Mixpanel**, highlighting the diverse ways businesses are using this data to optimize advertising, marketing automation, and customer success. These destinations enable teams to create targeted campaigns, proactive support strategies, and personalized recommendations based on customers' predicted actions.

The Bottom Line

Predictive traits are transforming customer engagement, enabling businesses to move from being reactive to proactive. As adoption grows and more traits are activated, the potential for personalization and ROI will only increase. By integrating predictive insights into their tech stacks, businesses can stay ahead of the curve and deliver the future of customer engagement.

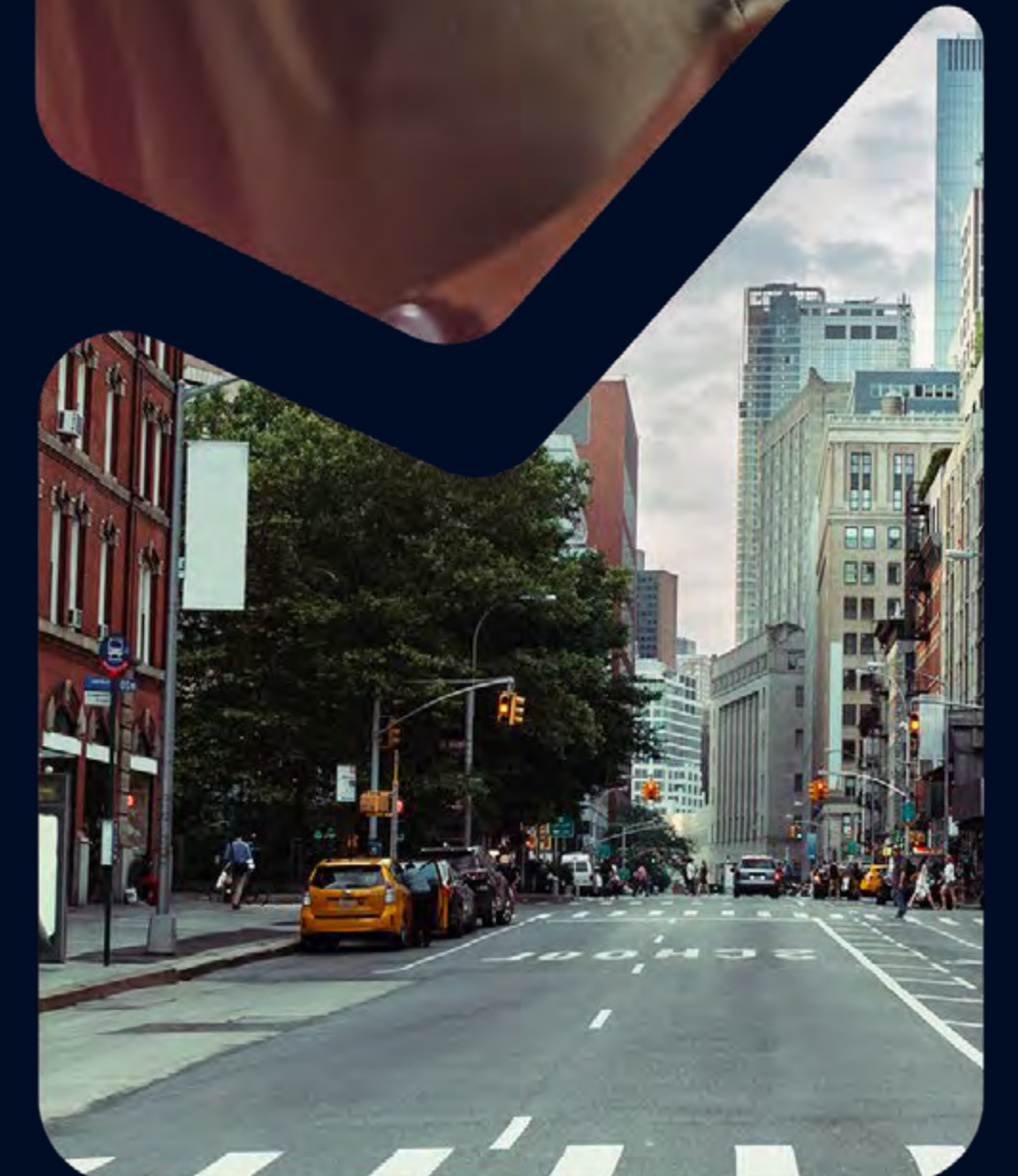
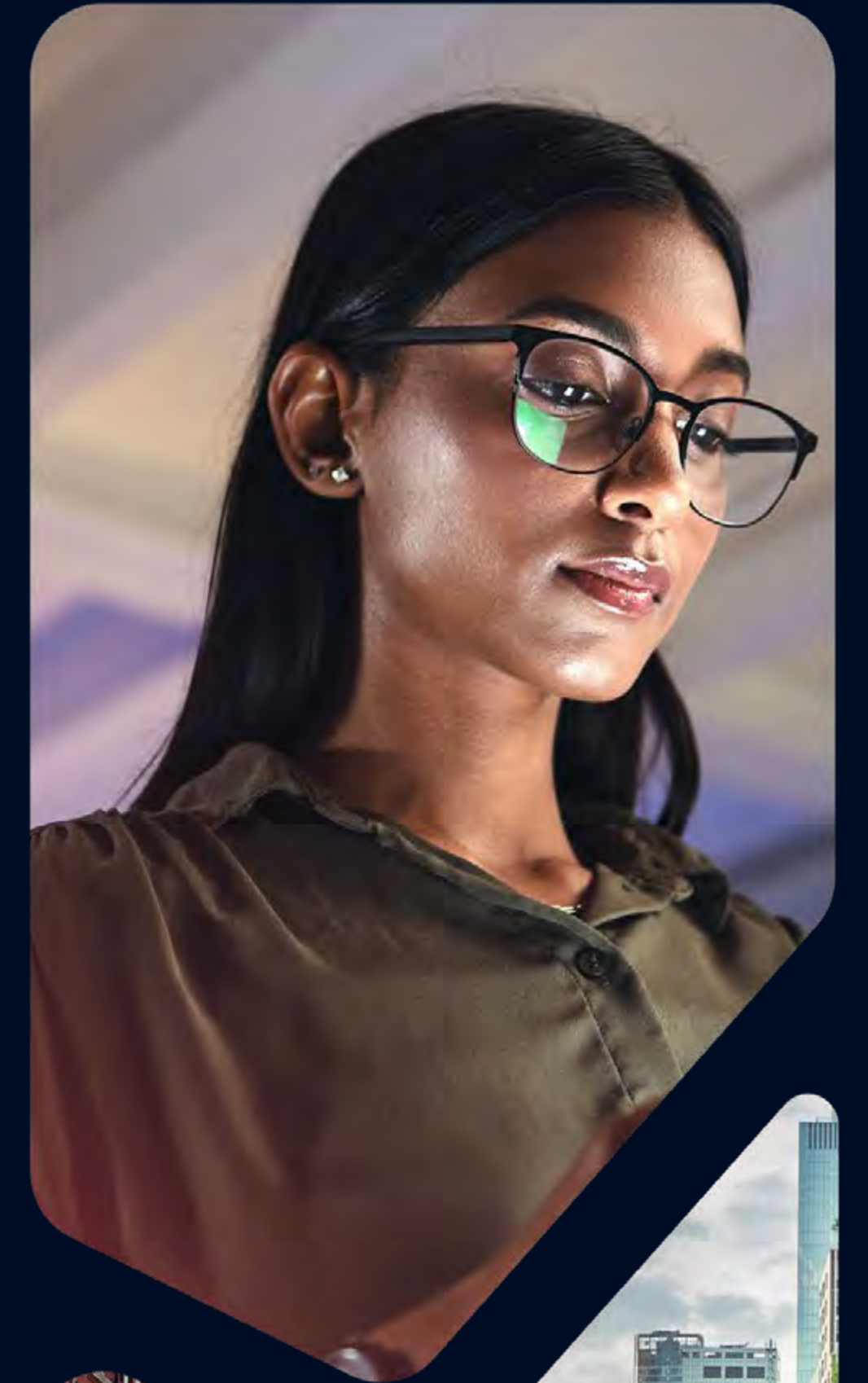
Destination Popularity for Predictive Traits



In 2024, Predictive Traits on the Twilio Segment platform grew significantly by **57% year over year**

Building a future fueled by
CUSTOMER DATA

11



The story of customer engagement in 2025 is one of evolution and opportunity. Businesses today face a digital landscape more complex than ever, where customer expectations are higher, competition is fiercer, and data is the key to staying ahead. The Twilio platform sits at the center of this transformation, enabling businesses to unify, understand, and act on their customer data with precision and purpose.

From analytics and warehouses to advertising and email marketing, the tools businesses choose reflect their priorities and strategies. The categories we've explored in this report—driven by trillions of data points—represent the most critical components of modern data ecosystems. They show how organizations are embracing composable architectures, where best-in-class tools integrate seamlessly to power everything from personalized experiences to proactive customer success.

Integration, not isolation, is the new competitive advantage. As the [Martech Replacement Survey](#) highlights, businesses no longer tolerate tools that fail to play nicely with others. This demand for interoperability is shaping the future of customer data strategies. Companies that prioritize openness, flexibility, and scalability—leveraging the synergy between foundational platforms like CDPs and specialized tools are leading the charge.

The numbers tell a clear story: nearly 10 trillion rows of data synced to warehouses, billions of emails driving engagement, and countless customer interactions analyzed through heatmaps, CRMs, and attribution tools. But behind these numbers lies a deeper truth: customer data is a driver of innovation, loyalty, and growth.

As businesses look to the future, a simple mandate crystallizes: embrace data-driven decision-making, invest in tools that work seamlessly together, and never stop evolving. Twilio empowers you to do just that, transforming your customer data into a strategic advantage.





Today's leading companies trust Twilio's Customer Engagement Platform (CEP) to build direct, personalized relationships with their customers everywhere in the world. Twilio enables companies to use their communications and data to add intelligence and security to every step of the customer journey, from sales to marketing to growth, customer service and many more engagement use cases in a flexible, programmatic way. Across 180 countries, millions of developers and hundreds of thousands of businesses use Twilio to create magical experiences for their customers.

For more information about Twilio (NYSE: TWLO), visit: www.twilio.com.