

Research Article

The Emerging Challenges of Customer Relationship Management with Customer Data Platforms (CDP): Constraints and Perspectives

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Abstract

Customers today are increasingly demanding a personalized shopping experience, coupled with stringent data security measures and prompt responses. As the landscape of online privacy evolves, particularly with the anticipated sunset of third-party cookies by 2024, businesses face a critical imperative to revamp their customer data management strategies. The emergence of Customer Data Platforms (CDPs) stands out as a pivotal solution in this evolving ecosystem. This article undertakes a detailed critique of CDPs, starting with insights gathered from both users and industry experts, and subsequently examining consumer perceptions and behaviors in the digital realm. At the heart of contemporary consumer expectations lies the desire for tailor-made interactions that reflect their preferences and behaviors. This demand necessitates robust data management tools capable of aggregating, analyzing, and activating customer data across multiple touchpoints. CDPs have emerged as a central tool in this endeavor, offering businesses a unified platform to integrate disparate data sources and derive actionable insights in real-time. By leveraging comprehensive customer profiles built from first-party data, CDPs enable businesses to deliver personalized experiences that foster customer loyalty and drive revenue growth. Moreover, the impending demise of third-party cookies, compounded by stringent data protection regulations like GDPR (General Data Protection Regulation) and CCPA (California Consumer Privacy Act), underscores the urgency for businesses to adopt privacy-centric data practices. CDPs play a crucial role in this paradigm shift by empowering businesses to ethically collect and utilize customer data, thereby enhancing transparency and trust. However, challenges persist, including the complexity of integrating CDPs into existing infrastructures and ensuring compliance with evolving regulatory frameworks. From a consumer standpoint, attitudes towards data privacy are evolving, with an increasing emphasis on transparency and control over personal information. Consumers are more inclined to engage with brands that demonstrate a commitment to data security and ethical data usage practices. This shift necessitates a nuanced approach from businesses using CDPs, emphasizing not only personalization but also data protection and consent management. While CDPs offer substantial benefits in navigating the complexities of modern data management and meeting consumer expectations for personalized experiences, their successful implementation hinges on addressing technical, regulatory, and ethical considerations. By doing so, businesses can not only adapt to the evolving landscape of digital privacy but also foster enduring customer relationships grounded in trust and mutual value.

Keywords

Data Collection and Management, Online Consumer Behavior, Customer Relationship

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1. Introduction

Consumers now seek highly personalized shopping experiences, stringent protection of their personal data, and immediate responses to their inquiries. With the tightening of online data regulations and the anticipated phasing out of third-party cookies by 2024, companies are compelled to reassess their approach to customer data management. In this context, the Customer Data Platform (CDP) becomes particularly relevant and strategic.

This article offers an in-depth analysis of this solution. In the first part, we will examine the opinions and experiences of CDP users and experts, evaluating its effectiveness and limitations. Next, this article will explore consumers' perceptions and behaviors on the web, highlighting how they interact with digital platforms and their expectations regarding personalization and privacy.

By drawing on testimonials and case studies, it aims to understand how the CDP can meet the growing needs of businesses to provide an optimized user experience while adhering to new data protection standards. Additionally, it will analyze current and future market trends, examining the evolution of consumer behaviors and the new practices adopted by companies to adapt to this rapidly changing environment.

Companies must anticipate consumer needs while understanding their online behavior. The Customer Data Platform (CDP) is a marketing technology that unifies customer data from marketing and various other channels. This centralization of data allows for the creation of detailed customer profiles and the optimization of the timing and targeting of messages and offers. According to the CDP Institute, the sector's revenue reached \$2.3 billion in 2023, with nearly 171 active vendors [1].

What is the added value of this technology for businesses? What are the challenges of this solution concerning consumer expectations?

2. Theoretical Framework of the Study

Online, every consumer leaves behind traces of their browsing habits, preferences, and interests. These data are extremely valuable to marketers, as they represent a rich source of actionable insights. To harness these data effectively, it is essential for businesses to collect, process, and activate them across various channels. The collection of such data constitutes a veritable goldmine for marketing teams, containing potentially very useful information about consumer behaviors. In this context, Data Management Platforms (DMPs) play a crucial role.

2.1. Data Management Platform

A Data Management Platform (DMP) is a service that collects and manages user data, often from online sources such as

cookies, but also from offline sources like importing customer lists from physical stores. The DMP functions as a central hub for all collected data, enabling market segmentation and the creation of personalized content by integrating offline data obtained through CRM systems. To achieve this, the DMP assigns a unique ID to each user, tracking their journey. Online data include browsing information (cookies), interactions on social media, and digital campaigns, providing insights into web behavior of both customers and prospects. Offline data come from company CRM databases, containing information on clients or prospects. Once these data are collected, the DMP processes, analyzes, and stores them on a server. With the help of algorithms, it becomes possible to optimize media purchases by enhancing the content of messages targeted at each audience. The majority of advertisers investing in a DMP aim to maximize the efficiency of their media buys: 87% specifically seek to improve ad targeting, while 83% want to adapt audience media buying [2].

2.2. Regulatory Framework

To regulate the use of data, the European Union has established the General Data Protection Regulation (GDPR), which ensures the protection of individuals concerning the processing of personal data and their free movement. This regulation mandates that companies using a DMP notify users about the data collected, its use, and ensure that users have given their consent. A Data Protection Officer must document the collection process, secure storage, and allow individuals to modify their choices at any time.

The National Commission for Information Technology and Liberties (CNIL) in France helps professionals comply with the rules and enables individuals to exercise their rights over their personal data. From 2019, CNIL established principles regarding online consent: mere continuation of browsing is no longer sufficient as valid consent. Users must be able to withdraw their consent easily and be clearly informed about the purposes of the trackers before consenting, as well as the consequences of their acceptance or refusal.

These requirements make user consent more transparent and allow them to better control the sharing of their personal data. Companies had until March 31, 2021, to comply. The European ePrivacy Regulation, complementing the GDPR, regulates electronic communications on the internet, stipulating that consent must be prior, free, informed, and unambiguous. This regulation, expected to take effect in 2024, imposes strict rules on data collection and processing.

Studies have shown that many internet users are not fully aware of the amount of data shared online, particularly through third-party cookies. A third-party cookie is a file embedded by a site different from the one visited, via a browser, to store information locally. Since 2018, Firefox has implemented enhanced tracking protection, blocking

third-party cookies. Safari followed in 2020, while Chrome, holding the largest market share, plans to eliminate them by the end of 2024.

The evolution poses a threat to Data Management Platforms, which largely rely on the collection of third-party data (cookies). Additionally, adblockers, which remove or hide advertising content during browsing, also limit the effectiveness of digital advertising. These tools, used by many internet users, prevent the display of various advertising formats such as pages, videos, pop-ups, sticky bars, banners, and ads.

Analyses conducted on the practices of the most visited websites show that data protection principles have contributed to reducing the intensity of advertising tracking and the amount of third-party cookies deposited per site.

2.3. Customer Data Platform

Companies must, therefore, reinvent sustainable customer data management tools. The Customer Data Platform (CDP) emerges as an interesting solution. This marketing technology unifies customer data to create comprehensive profiles (a single customer reference) and optimizes the timing and targeting of messages and offers. In essence, the CDP compiles all available information about a customer (structured and unstructured data from each touchpoint and other sources) into a unified profile updated in real-time. This enables a 360° view of customers by centralizing online and offline data, considering the various touchpoints of customer journeys.

Compared to the DMP, the CDP handles both anonymous and personally identifiable data, such as names, postal addresses, or phone numbers, while DMPs primarily focus on anonymous entities like cookies. CDPs are increasingly integrated with advertising systems, storing more DMP-type information, such as cookie IDs combined with audience tags.

A real-time customer profile allows companies to activate customer data across different channels without losing the consumer. The interaction can thus become more human, similar to a face-to-face conversation between two people [3].

Personalization can be defined as a company's ability to recognize and treat its customers individually through personalized messages, targeted banners, and special offers. Today, organizations must gain an in-depth and comprehensive understanding of all interactions between them and their customers [4-6]. This approach proves highly efficient, offering a 40% return on investment [7].

3. Research Hypotheses and Methodology

The objective is to evaluate the effectiveness of Customer Data Platforms (CDP) in customer relationship management,

particularly within an increasingly regulated phygital environment.

There have formulated three research hypotheses:

1. H1: The CDP enables companies to achieve their marketing objectives through its numerous advantages.
2. H2: Internet users are aware of the practices concerning their personal data (e.g., cookie acceptance, advertising messages).
3. H3: The perceived benefits of the CDP align with consumer behaviors on the web.

To test these hypotheses, we conducted qualitative interviews with professionals who use Customer Data Platforms daily to identify the motivations of companies that have adopted this tool. Additionally, we carried out a quantitative survey involving 463 internet users to assess their acceptance of these practices. Since the goal of a CDP is to best meet consumer expectations, we examined their behavior in response to online solicitations: Are they willing to share their data? Do they readily accept cookies to receive relevant communications subsequently? We also considered the advantages highlighted during qualitative interviews and those identified in the literature to gather the final consumers' opinions.

This mixed-method approach allowed us to comprehensively analyze both the professional and consumer perspectives regarding the adoption and efficacy of Customer Data Platforms.

3.1. Qualitative Phase

To conduct the qualitative study, we developed an interview guide composed of four themes: understanding and using the Customer Data Platform, its advantages (meeting consumer expectations) and challenges, its functionalities and integration, and future perspectives of the tool (see Appendix I).

We reached out to professionals via social media (LinkedIn), indicating that we were seeking users of Customer Data Platforms. We obtained contacts from five individuals working in various sectors who agreed to participate in recorded individual interviews lasting approximately 30 minutes each via Zoom (see Table 1).

All participants emphasized the importance of the CDP as an essential tool for achieving their marketing objectives: "The CDP has enabled me to optimize my campaigns, particularly because it allows for efficient data structuring, making it easy to use the data for various purposes in a straightforward manner" (Interview C).

They also highlighted the importance of choosing the right tool: "It is crucial to clearly define your needs and marketing objectives before selecting a CDP. This will enable you to choose a platform suited to your use cases and maximize your performance" (Interview B).

Table 1. Organizations using CDP.

Interview	Sector	Duration of Use	CDP(s) Used
A	Food and Beverage	2 years	Oracle, Mediarithmics
B	Energy	5 years	Numberly, Mediarithmics, Selesforces
C	IT Services	2 years	Numberly
D	Industry	9 years	Tealium, Oracle, Mediarithmics
E	Construction	5 years	Mediarithmics, Adobe, Permutive

Furthermore, before deploying a CDP, it is essential to define use cases and raise awareness among all relevant teams: "A CDP will only be effective if you have well-defined use cases beforehand" (Interview C). "All involved teams must participate to provide their input and monitor the project's progress" (Interview A).

The understanding of this tool's usage is unanimous: the CDP enables the collection of data from various sources to obtain a 360-degree view of the customer: "My understanding of this tool is that it harmonizes collected data by linking it to a unique identifier" (Interview D).

Users frequently mention key terms such as "detailed customer profiles," "homogeneous customer groups," and "better understanding of needs": "The transition to a CDP is driven by the richness of the data, which is crucial for understanding customer expectations" (Interview B).

Companies can segment customers to offer personalized communications: "We can personalize content thanks to the collected data, which is highly beneficial!" (Interview B). According to them, personalization allows for the delivery of relevant messages at the right time, thereby increasing conversion rates: "Thanks to tailored messages, we have observed an increase in conversion rates" (Interview E).

Respondents also highlight that the CDP enhances customer loyalty: "By better targeting, we improve customer loyalty, leading to more engaged communications" (Interview E).

Another advantage of the Customer Data Platform is the real-time updating of data. According to the respondents, this capability provides a competitive edge in meeting consumer expectations and standing out from competitors: "Real-time updating is crucial for responding to customer needs and differentiating ourselves from the competition" (Interview A).

During the five interviews, three respondents emphasized omnichannel capabilities as a benefit of the CDP. It allows for a unified view of customer data, facilitating the tracking of interactions across all channels: "Regardless of the channels used by customers, we maintain the history of their interactions" (Interview A).

The CDP also provides customers with the ability to directly manage their data: "Customers can modify the data they

wish to share" (Interview B). This advantage enhances trust and contributes to customer loyalty toward the company.

3.2. Quantitative Phase

For the quantitative study, the questionnaire was distributed across various platforms such as WeChat, LinkedIn, Facebook, Instagram, and others to gather a representative sample in terms of age, socio-professional category, and internet usage. A total of 463 responses were analyzed using SPSS. In the sample, the majority of participants were aged 18 to 24 (51.2%), with 36.9% aged between 25 and 54.

The questionnaire (see Appendix II) allowed us to measure the daily internet usage time excluding professional purposes. We found that most participants use the internet for 2 to 4 hours per day, while 25% use it for 4 to 6 hours, and only 6.2% exceed 6 hours. Regarding devices used, 84.7% use a smartphone, 10.2% a computer, and 5.1% a tablet. The majority accept cookies (62.1%), especially among the younger demographic, while 36.9% reject them. There is thus a correlation between the time spent on the internet and the acceptance of cookies.

The majority of respondents find online advertising annoying and intrusive, although the term "personalized" is recognized positively. However, qualifiers such as "engaging" and "interesting" do not describe online advertising. It appears that most participants have a negative view of online advertising, despite acknowledging its personalization, particularly among those who accept cookies.

A mixed opinions was also observed regarding the relevance of emails and SMS received, with 45.8% of respondents partially satisfied and 41.1% dissatisfied.

Email remains the preferred channel for receiving promotional messages online (52%), followed by SMS (16.4%) and social media (12.8%). Advertisements on websites and direct messages on mobile applications are less popular. Age does not seem to influence channel preferences, with email remaining the preferred channel across age groups.

Most internet users are unaware of the data they share online: 72.5% have no idea, 21.8% have a vague idea, and only 1.9% are well-informed. This underscores the need for continued user education and transparency in data collection.

Those who accept cookies have a better understanding of information dissemination (62%).

Regarding data sharing, 50.7% of respondents are willing to share their interests to receive personalized content, while 40.9% do not wish to share any data.

Concerning personalized advertisements based on recent activities, 72.7% of respondents reported having clicked on a personalized advertisement, primarily those who accept cookies. Age influences clicking behavior, with younger individuals more likely to click.

Only 30% of respondents are more likely to purchase from a company that personalizes the customer experience, while 29.5% believe personalized advertising has no impact on them, and 20% are less likely to purchase. The most appreciated customer experiences include receiving enhanced customer service, personalized content, promotional offers, and choosing the communication channel based on personal preferences.

4. Results and Recommendations

4.1. Advantages of CDP (Hypothesis 1)

Customer Data Platforms (CDPs) offer various advantages to businesses, but selecting the appropriate solution is crucial. Our findings indicate three main typologies of CDPs:

1. Martech CDP: These solutions integrate within an existing suite of tools but may result in significant dependence on the vendor.
2. Customer Experience CDP: These platforms focus on customer activation and engagement, providing features such as segmentation, customer journey orchestration, and personalization.
3. Data Management CDP: These options emphasize data management, including data ingestion, profile unification, and data cleansing.

For successful CDP implementation, internal collaboration, clearly defined use cases, and an inventory of impacted tools are essential. Selecting the solution that best meets the specific needs of the business is crucial.

4.2. Internet User Awareness (Hypothesis 2)

Our results show that most internet users are unaware of the data they share online, highlighting the need for increased awareness. Companies should inform their customers about the collection and use of personal data. Awareness initiatives could include webinars led by digital marketing or legal experts, aiming to compare generic and personalized advertisements. It is important for customers to understand the significance of data sharing for receiving personalized content and to feel reassured about the security of their information through features like data management in customer portals.

4.3. Adapting CDP to the Current Context (Hypothesis 3)

Respondents aware of data usage recognize the value of personalized advertising and expect enhanced customer service. CDPs can meet these expectations through functionalities such as a 360-degree customer view and real-time data updates. Despite recent challenges related to regulation and changing consumer expectations, CDPs offer satisfactory solutions. Thorough research, preparatory steps, and collaboration with other businesses are essential for maximizing CDP performance. By transforming customer data into actionable insights, CDPs enable businesses to create personalized and engaging experiences, providing a competitive edge in the market.

5. Conclusion

This study highlighted the motivations for businesses to adopt a Customer Data Platform (CDP). The primary reason is the desire for a better understanding of the customer experience, cited by 41% of respondents, followed closely by customer loyalty and retention (38%), and data quality. The cost-benefit ratio is also crucial given the acquisition cost of this tool. Marketing specialists observed a rapid return on investment after implementing a CDP, with nearly 70% of respondents reporting positive returns within 6 months and 96% within 12 months.

We identified five main reasons driving the choice of a Customer Data Platform: protecting customer data privacy, collecting real-time data for increased responsiveness, enhancing the performance of technological investments, targeting customers individually with personalized messages, and creating a single source of customer data accessible to all departments.

Moreover, GDPR discourages data dispersion across multiple tools, promoting CDP adoption. Data protection regulations and data management standards are evolving to meet consumer expectations for transparency. Approximately 40% of CDP users indicated that regulatory changes played a significant role in their decision to implement this solution. Since customer loyalty largely depends on trust, businesses are seeking to strengthen the protection of collected data. CDPs provide customers with the ability to control and update the information they share with a company in real-time via their customer accounts.

In conclusion, the Customer Data Platform is a powerful tool that adds significant value to businesses by enabling them to better understand their customers, comply with privacy standards, and meet evolving regulatory expectations.

Abbreviations

CDP Customer Data Platform

GDPR	General Data Protection Regulation
CCPA	California Consumer Privacy Act
DMP	Data Management Platform
CRM	Customer Relationship Management
CNIL	The National Commission for Information Technology and Liberties (in France)

Conflicts of Interest

The authors declare no conflicts of interest.

Appendix

Appendix I: Interview Guide – CDP Users

1. Could you briefly introduce yourself?
 2. Which Customer Data Platform (CDP) have you implemented?
 3. How long have you been using this CDP solution?
 4. Have you had prior experience with a Customer Data Platform?
- Understanding CDP Usage
5. How does the Customer Data Platform help you achieve your marketing objectives? Could you provide concrete examples?
- Advantages and Disadvantages
6. In your opinion, what are the primary advantages of using a Customer Data Platform that prompted you to adopt this solution? What challenges have you encountered or do you anticipate?
- Functionality
7. How would you assess the user experience of the Customer Data Platform?
- Integration
8. How has the CDP integrated with your other tools?
9. What has been your experience with the platform's technical support?
- Use Cases/ Meeting Consumer Expectations
10. Could you provide concrete examples of how the CDP has been used to meet consumer expectations?
 11. Have you observed positive feedback from consumers as a result of using the CDP in your company? Could you provide examples?
- Future Perspectives
12. How do you foresee the future use of the Customer Data Platform in your company?

Appendix II: Questionnaire Submitted to Internet Users

Hello everyone,

We invite you to participate in a survey about your online behavior. We are studying a data management tool that companies might use for commercial and communication purposes. To better understand customer issues, we would like to gather your opinion... in less than 5 minutes. Your responses will remain confidential, and there are no right or wrong answers. Thank you in advance for your participation, and please feel free to share this questionnaire with those around you.

1. How much time do you spend on the internet per day, excluding professional use (social networks, web browsing, etc.)?
 - a. Never
 - b. 1-2 hours
 - c. 2-4 hours
 - d. 4-6 hours
 - e. More than 6 hours
 - f. Prefer not to answer
2. On which device do you primarily access the Internet? (One answer possible)
 - a. Smartphone
 - b. Tablet
 - c. Computer
 - d. Prefer not to answer
3. Do you generally accept cookies when browsing websites?
 - a. Yes
 - b. No

- c. I don't know
- 4. How would you describe online advertising?
 - a. Personalized
 - b. Annoying
 - c. Invasive
 - d. Engaging
 - e. Interesting
- 5. Are you satisfied with the relevance of the emails and SMS you receive from your various providers (telecom, energy provider, etc.)?
 - a. Completely satisfied
 - b. Partially satisfied
 - c. Dissatisfied
 - d. I don't know
- 6. What is your preferred channel for receiving promotional/advertising messages online? (One answer possible)
 - a. Email
 - b. SMS
 - c. Social media
 - d. Website advertisement
 - e. Direct message on mobile apps
 - f. I don't know
- 7. Do you feel that you control the amount of personal data you share online?
 - a. Yes, completely
 - b. Yes, somewhat
 - c. No, not at all
 - d. I don't know
- 8. What type of data would you be willing to share in order to receive personalized content (email/advertising, etc.)?
 - a. my demographic data
 - b. my interests
 - c. my consumption history
 - d. my communication preferences (email, SMS, call)
 - e. my current projects
 - f. I do not wish to share my personal data.
 - g. I do not wish to answer
- 9. Have you ever clicked on an online ad that was recommended to you based on your recent browsing? For example, you browse a travel site, and shortly after your visit, you receive ads related to your browsing. This is an ad recommended based on your browsing.
 - a. Yes
 - b. No
 - c. I don't know
- 10. What do you think about the relevance of personalized ads based on your interests? (Rate from 1 to 10, with 10 being the best score)
- 11. How do you react to a brand that personalizes your customer experience based on your preferences and browsing?
 - a. I am not likely to buy from this enterprise.
 - b. it makes no difference to.
 - c. I am less likely to buy from this enterprise.
 - d. I don't know.
- 12. Rank the following types of customer experiences from 1 to 4 in order of preference.
 - a. receive personalized content.
 - b. benefit from improved customer service.
 - c. receive promotional offers.
 - d. choose my channel based on my preferences.
 - e. I don't know.
- 13. How old are you?
 - a. Under 18
 - b. 18-24 years

- c. 25-34 years
 - d. 35-44 years
 - e. 45-54 years
 - f. 55-64 years
 - g. 65 years and over
 - h. Prefer not to answer
14. You are?
- a. Male
 - b. Female
 - c. Prefer not to answer

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