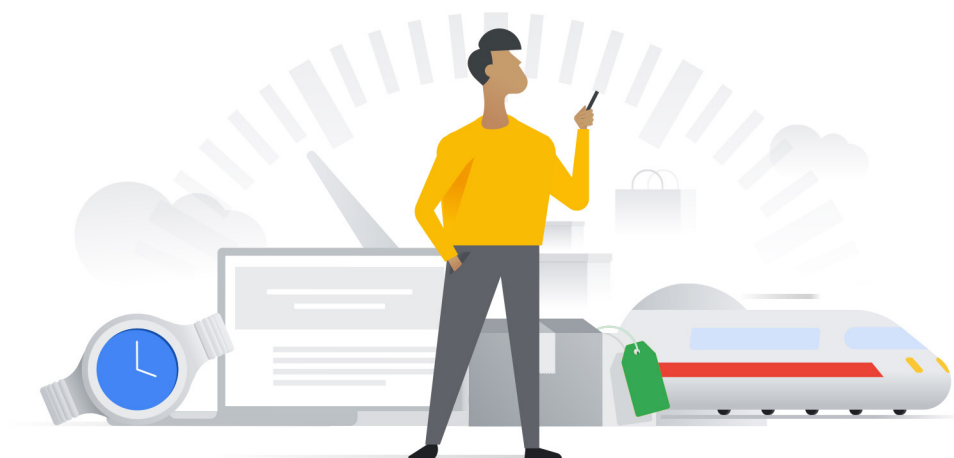


SOLUTION GUIDE

Racing against time: How top brands win consumer moments





FOREWORD

Are you struggling to capture the attention of demanding consumers before the moment passes?

If so, you're not alone.

Today's consumers are more than empowered — they're impatient. They expect exactly the help they need at the very moment they need it. We see this in Google search trends, where search interest in "same-day shipping" has doubled in the past two years. Search interest in things that are "open now" has *tripled*.¹

To put it simply, consumers have changed how they think about time. So it's no surprise that today's winning brands are *also* thinking of time in new ways.

A recent [study by Bain & Company](#), in partnership with Google, showed that the brands making the biggest leaps forward today — those in the top 20% based on market share and revenue growth — are using technology to their advantage by redoubling their focus on speed. In the guide that follows, we'll share with you the four things those marketing leaders have in common, and look at how to help your organization make more timely connections.

To move faster, you'll not only want to assess the technology you use, but you may also want to think about your organization differently. We hope you'll find this report useful.



Suzanne Mumford
Head of Platforms Marketing

1. [Micro-Moments Now](#). Why expectations for 'right now' are on the rise, global, August 2017.

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One of the biggest challenges faced by marketers today is capturing the attention of consumers before a moment passes.

Sometimes it means knowing *when* to act. Sometimes that means being faster: analyzing faster, planning faster, acting faster.

Bain & Company, in partnership with Google, recently [surveyed marketers around the world](#) to see what the leaders were doing right – and what laggards were missing. While there were many nuances, the results showed leaders were connecting data in new ways, and connecting teams in new ways so they can take advantage of that data and act right on time.

In this guide we'll look at that research, and at interviews with leading brands, to show how successful marketers do four things differently:

- › Understand audiences on a deeper level by building a connected data strategy
- › Deliver faster, smarter marketing using automation and machine learning
- › Gain more visibility and control by bringing ad and analytics technology together
- › Share insights across teams and improve business outcomes

What does it look like when insights and teamwork are put together in service of the timeliness consumers crave? Consider the case of adidas.

For adidas, creativity is both a brand message and an approach to marketing. Their team hypothesized that creating digital campaigns with sequential messaging might help move people from browsing to buying. Brand and ecommerce teams shared and analyzed data to adjust their creative and calls to action to drive brand awareness (“Explore now”), product consideration (“Learn more”), and eventually, a purchase (“Shop now”).

This data-driven sequential approach led to a remarkable result. People who saw the performance-focused “Shop now” ads *after* the “Explore now” brand ads were 75X more likely to convert than those who saw only brand ads. That's right: **75X**. (Read the [full story](#).)

The adidas team credits the discovery to a [strong connection between brand and performance teams](#), together executing a full-funnel strategy. They used performance data and insights to better understand *and react* to consumer moments of need. And they used unified ads and analytics technology to execute and deliver assistance faster.

To connect with consumers at the right moment, you need to build timeliness into your organization. It starts with step one: a connected data strategy.

Part 1: Understand your audience by connecting your data

Fifty years ago, people’s buying patterns were mostly the same from one year to the next. [Not today](#). Consumer behaviors change constantly now, so there are always new insights to learn and react to.

That’s probably why Bain found that improved understanding of customers is the **number one investment priority of marketers over the next three years**. Globally, marketers rate it as a higher priority even than hiring new talent.²

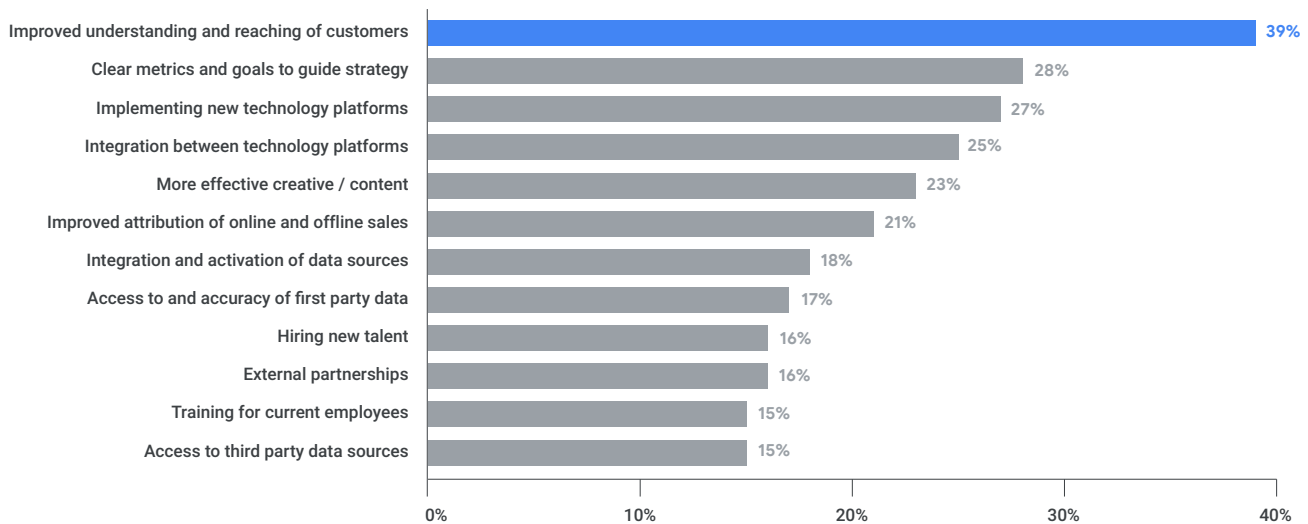
“It’s really important for us to use data and the digital space to understand what our consumers are listening to, what they’re looking at, what’s inspiring them,” says Kelly Olmstead, vice president of brand activation for North America at adidas. “More than ever before, data is driving the stories we tell, when we tell them, and how they resonate with our consumers.”

The path to better customer understanding starts with breaking down silos in your own teams and technologies. If your analytics team uses one set of technologies, and your marketing team uses another, you’re going to lose a lot of time climbing back and forth over that wall with buckets of numbers.

“It’s really important for us to use data and the digital space to understand what our consumers are listening to, what they’re looking at, what’s inspiring them.”

–Kelly Olmstead, vice president of brand activation for North America, adidas

Top areas for investment in the next 3 years



Source: Bain/Google Marketing Leaders Study, global, November 2017.

2. Bain/Google Marketing Leaders Study, global, November 2017. n=1,683 marketing and advertising media and technology executive decision makers in North America, Europe, Australia and Japan.

Marketing leaders like adidas do a better job of connecting data across their organizations. Their key goals are to discover:

- › A clearer picture of their audience
- › A better view of customer journeys across devices
- › More timely ways to act on audience insights

How should the right data strategy bring critical pieces of data together? First, look at your internal data sources. This is often what marketers use to segment audiences and look for high-value groups. How much of your data from those internal systems are you using?

You can probably use even more of it if you connect your web and app analytics with your CRM. This gives you a more complete picture of how your customers engage with your brand online. What about all the other ways people engage with your business? You may have email campaigns, billing systems, and loyalty programs which also contain rich insights into the behaviors of your best audiences. If you haven't connected them yet, it's time to start.

"You need a vision for how to use that data. Our vision was based around understanding our customers. Then we had to develop the tools, like a customer database, to get there"

–Julie Rieger, president, chief data strategist and head of media, 20th Century Fox Film

The Privacy Connection

It's no coincidence that today's marketing leaders are focused on maintaining data privacy. Today's consumers demand more transparency about how their information is used, and they reward brands who protect their privacy and can ensure full compliance in handling data.

This kind of data privacy is built on respecting users and their information: giving them choices, transparency and control. The result is a seismic shift in how the industry approaches the data ecosystem. Everyone can thrive when we hold ourselves to this kind of standard. All of these things – transparency, privacy, security – are easier with a unified data strategy.

"It's challenging for the digital ecosystem," [says Mark Read](#), joint head of the world's biggest ad agency, WPP. "But if consumers feel confident that their data is being protected and they understand how it is being used and it's done with permission, ultimately that should be a good thing for clients and for us."

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Next, look into relevant *external systems* to see what kind of data would add to a more complete customer understanding. Things like search intent and videos viewed can offer powerful audience signals.

“While data has revolutionized our business, it’s not enough to just have data,” [says Julie Rieger](#), president, chief data strategist and head of media at 20th Century Fox Film. “You need a vision for how to use that data. Our vision was based around understanding our customers. Then we had to develop the tools, like a customer database, to get there.”

CASE STUDY

Bayer gains a clearer view



Challenge

Bayer Consumer Health is a great example of a company that invested in gaining a deeper understanding of their consumers and the full customer journey. Bayer conducted an audit and assessment of its data and platforms to see if they could help teams better meet their goals and objectives. That led them to bring together all their disparate data sources, including social, analytics, TV, and ad performance. Ultimately they built a single view of data where teams could access insights across all channels.

Result

With one place to view data, they can now spend time understanding their customers’ preferences and behavior. Full-stack technology gives Bayer the opportunity to create a truly customer-centric advertising experience instead of just adapting the media-buying techniques from old to new channels.

[Read more](#) about the Bayer story



Recap: How to get your timing right

- › Build a unified data strategy that blends internal and external system data to give you a clear picture of customer journeys
- › Create a vision for how you want to use your data, and be use-case driven
- › Make privacy part of your data strategy and build consumer trust through transparency



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Part 2: Deliver faster, smarter marketing by leaning on machines

As data-driven as we may be, humans can't tally and sift data as fast as machines. Leading marketers use **integrated, intelligent technology** to automate processes and speed up time to action.

Machine learning is opening new doors here, as it has in so many other areas. With cloud-based technology and machine learning, an organization can integrate data better and faster — and learn more from it. Your team can more quickly surface ad trends and patterns from massive data sets, and routine day-to-day tasks can be automated. The Bain study shows that leaders are **1.2X more likely to be advanced users of technology than laggards.**³

Julie Rieger's vision for Fox is a good example. In order to grow the business, she believed Fox needed to bridge the gap between movie marketing and ticket sales. The problem: Fox doesn't own the ticket sales data. That belongs to individual theaters nationwide. On top of this, many of Fox's valuable touchpoints with potential customers come through paid media, as on YouTube. Like many businesses, Fox was disconnected from their customer.

That's why Fox began to build a customer database that consolidated all of its data sources for movie-goers. That's 250 million people in the U.S. alone. To do it, [Fox used Google Cloud](#) to merge user-level campaign data from Google Marketing Platform and YouTube with other data sources — like offline ticket sales — into a single place.



Marketing leaders are 1.2X more likely to be advanced users of technology than laggards.

3. Bain/Google Marketing Leaders Study, North America, November 2017, n=516 marketing and advertising media and technology executive decision makers. North America Leaders (n=123) are defined using a composite score of self-reported revenue and market share growth.

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Now they get much better insights into who they should be trying to reach and what creative they should use for each of their film releases. When *The Greatest Showman*, a Fox film starring Hugh Jackman as circus showman P.T. Barnum, had a disappointing opening weekend, the team was able to discover that the film was resonating with a completely different audience than they had expected.

And they reacted immediately, adjusting their creative away from a focus on traditional musical magic and towards a message of inclusivity driven by the tattooed men, bearded ladies, and other circus characters featured in the film. That helped propel the box office to over \$400 million, making it the [third-highest grossing live action musical film](#) of all time.

Cloud solutions make it easier to implement new technologies, like machine learning, that can quickly evaluate and analyze large data sets. Instead of having your IT team build everything from scratch, you can take advantage of pre-trained machine learning models or use tools to help you create your own custom models.



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Cloud providers also invest heavily in security, because it's such a core value to their customers. This means your organization can get access to advanced security capabilities, such as encrypting all data by default, that can otherwise be very hard to implement.

CASE STUDY

Office Depot finds new demand



Challenge

Office Depot continues to grow a profitable customer base by discovering new insights using machine learning tools and cloud technology. A component of its success is finding and testing *new* audiences they couldn't find before.

In partnership with their agency, Merkle, Office Depot analyzed large data sets in Google Cloud to find new audiences with high-lifetime value, then used Google Marketing Platform to reach these audiences with more relevant ads. One particular audience converted 19% better than the audiences created from Office Depot's existing first-party CRM data.

Result

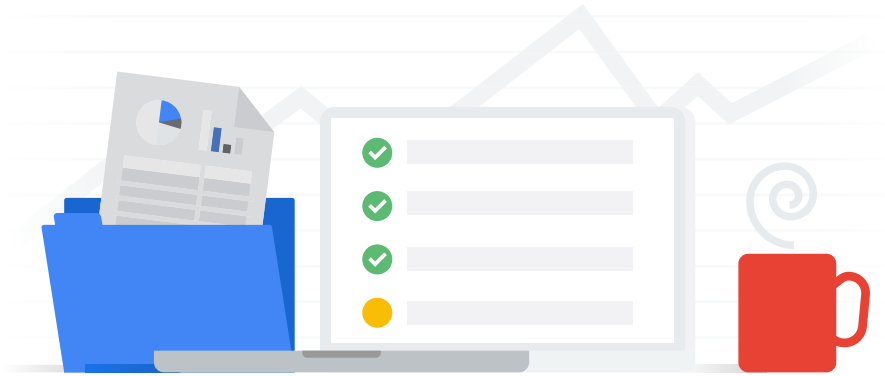
With this data-driven and audience-first strategy, Office Depot captured more demand while delivering a more timely and personal customer experience.

19%

One particular audience converted 19% better than the audiences created from Office Depot's existing first-party CRM data.

Recap: How to get your timing right

- › Embrace machine learning to do the number-crunching for you and help find new consumer behavior patterns and/or anomalies
 - › Build connections between insights tools and marketing execution platforms so you can take immediate action
 - › Know that machine learning can help you both ways: to better understand yesterday's results and to speed adjustments to marketing today
-



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Part 3: Gain more control by bringing ads and analytics tech together

Integration does more than help you connect with customers. When Bain asked for the top benefit of marketing and advertising technology integration, leaders replied that it was “control over investments and channels.”⁴

To reach that new level of control, leading marketers and their agencies are working to bring ad technology and analytics together under one roof. In some cases, agencies are consolidating within the existing ecosystem so that they can offer the all-in-one data help their clients need. In other cases, brands are bringing their marketing data back in-house so they have greater visibility, plus more control to connect first-party data.

Bain’s research shows that marketing leaders are 1.4X more likely than marketing laggards to manage their technology within their own marketing team today. And over the next three years, we expect that to rise to fully 2X more likely to manage their own technology within marketing.⁵



Marketing leaders are 1.4X more likely than marketing laggards to manage their technology within their own marketing team today.

4. Bain/Google Marketing Leaders Study, North America, November 2017. n=88 marketing leaders; marketing and advertising media and technology executive decision makers. Leaders and Laggards are defined using a composite score of self-reported revenue and market share growth. Of the total n=516 respondents, there are 123 Leaders with n=88 who prefer integrated technology. 5. Bain/Google Marketing Leaders Study, North America, November 2017, n=516 marketing and advertising media and technology executive decision makers. North America Leaders (n=123) are defined using a composite score of self-reported revenue and market share growth.

According to [The Wall Street Journal](#), a new study from Forrester and the [In-House Agency Forum](#) shows that in-house advertising agencies are also on the rise. The study shows that advertisers with in-house agencies increased to 64% from 42% over a span of 10 years.

Leaders know that closer control means faster decisions and faster action.

CASE STUDY

Sprint reduces churn



Challenge

Sprint's chief digital officer and its head of digital marketing wanted more control to support their omnichannel approach, drive faster feedback loops, and fuel a culture of testing and experimentation. For Sprint, that meant bringing its advertising technology in-house.

Sprint had long worked with outside vendors to manage the technology platforms that enabled its media planning, buying, and creative. While the digital team had access to their campaign information and insights, it wasn't at their fingertips. That was one big driver for the change. "We felt that having all of our assets in-house, working together side-by-side, would let us be faster to market and help us increase our performance — from bidding, to the creative, to execution," says Rob Roy, chief digital officer.

Because Sprint now directly manages its marketing and ad technology, the digital team can join more proprietary information sources to uncover greater data insights. "Now we can tie point of sale system information, call information, and our bidding strategy together within one platform to create new and exciting insights," says Roy. "We have visibility of online and offline activity that we can merge together and really start to better understand our customers. That means we can think about how we market within our stores, based on campaigns that we're bidding on online."

Result

With systems in place, Sprint can spot signals that indicate churn and activate campaigns to prevent it in real time. Result: They've reduced customer churn by 10%.

"We have visibility of online and offline activity that we can merge together and really start to better understand our customers."

**—Rob Roy, chief digital officer,
Sprint**

10%

reduction in customer churn

[Read more](#) about the Sprint story



One final point: Marketing leaders are also more likely to empower CMOs as decision makers. Bain found that leading marketers are 1.7X more likely than laggards to say that their CMO is the final decision maker for their advertising and marketing technology.⁶ In laggard organizations, the research showed that the chief financial officer, or the CTO or CIO, more often is the decision maker for marketing and ad tech issues.

Why does it matter? Because if you have to ask and wait for an outside team to make technology changes or approve budgets, you won't be moving very fast.



Recap: How to get your timing right

- › Bring control over ad tech and analytics under one roof
- › Consider bringing your marketing technology closer to home to create faster feedback loops among teams
- › Make your CMO the key decision maker for marketing and ad tech

Part 4: Share insights across teams to affect business outcomes

You can't be a data-driven team if only a few people have access to insights. No surprise, then, that leading marketers provide greater access to insights across the organization. That helps everyone jump in and take faster, smarter action.

The Bain numbers show that leaders are 1.4X more likely than laggards to make budget decisions based on metrics. And they are 1.7X more likely to refresh data at least weekly.⁷

Ask yourself a question: When was the last time your key dashboards and reports were refreshed with the latest information? If you know the answer to that off the top of your head, you're probably on your way to being a leader.



Marketing leaders are 1.4X more likely than laggards to make budget decisions based on metrics.

6. Bain/Google Marketing Leaders Study, North America, November 2017, n=516 marketing and advertising media and technology executive decision makers. North America Leaders (n=123) are defined using a composite score of self-reported revenue and market share growth. 7. Bain/Google Marketing Leaders Study, North America, November 2017, n=516 marketing and advertising media and technology executive decision makers. North America Leaders (n=123) are defined using a composite score of self-reported revenue and market share growth.

At Sprint, they literally bringing data scientists, bid managers and creatives together in the same office clusters. “Hallway conversations can make huge differences in how we go to market,” says Roy. “It’s not unusual to walk out my door, tap the shoulder of somebody, and see a campaign optimized within a matter of minutes.”

That’s the essence of timeliness.

CASE STUDY

Aligning around the customer



Challenge

Interactive software company Electronic Arts Inc. (EA) has unified its teams around customer insights to be as close to players as possible and respond to their changing needs in real time. At EA, marketing, publishing, and analytics all report to the same leader and work from a single source of truth: customer insights.

Result

Because of this, player engagement is higher than ever, and conversion to new-release games has increased significantly.

[Read more](#) about the EA story



Recap: How to get your timing right

- › Keep dashboards fresh, and look for daily insights
 - › Bring teams together (literally if necessary) to share insights and take faster action
 - › Use a unified platform that gives everyone access to information
-



CONCLUSION

In a time when consumers crave immediate assistance from brands...

...the biggest challenge marketers face is capturing the attention of demanding consumers.

The opportunity is clear: Connect more directly with impatient customers at their moments of interest and action. The challenge? If you don't speak to their needs, they'll go straight to the rival that is ready to help at that moment.

Bain's research shows that the timeliest marketers, the ones who are helping grow their businesses, are managing their data and their teams with the four traits we've discussed in this guide. And, they accept that today's customer journey will change tomorrow.

Speed will continue to be the key to success, but technology will help you deliver.

Ready to take action? Here are some other resources that can help



Report

Want to learn more about how top brands are driving growth with timely connections? [Download the full 2018 Bain report.](#)



Resources

Learn more about [Google Marketing Platform](#), advertising and analytics together to make it easier to turn insights into action.

Explore how [Google Cloud](#) can help your business benefit from Google's core infrastructure, data analytics and machine learning powers.

Discover how leading marketers are making collaboration a top priority during the campaign creation process with [Display & Video 360](#) and seeing better business outcomes as a result.

Find out how successful teams are taking advantage of these [Analytics 360](#) features to transform their understanding of the customer journey and drive better business results.

About Google Marketing Platform

Google Marketing Platform is a unified advertising and analytics platform that helps enterprise marketers make better decisions faster. With Google Marketing Platform, you're in control of every campaign, so you have the flexibility to adapt to the needs of your business and your customers.

[Find out more](#)