Rethinking Your Data Strategy Before It's Too Late.

In this new cookie-less word, every brand is now a data company.

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A new era of online privacy

Consumers are demanding more privacy online. All the major web browsers have ceased (or are in the process of ceasing) support for third-party cookies.

This seismic shift toward privacy has significant implications for brands.

Marketing strategies that have relied heavily on third-party cookies are outdated now, making targeted ads a real challenge.

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Like it or not, every brand must rethink their data strategy
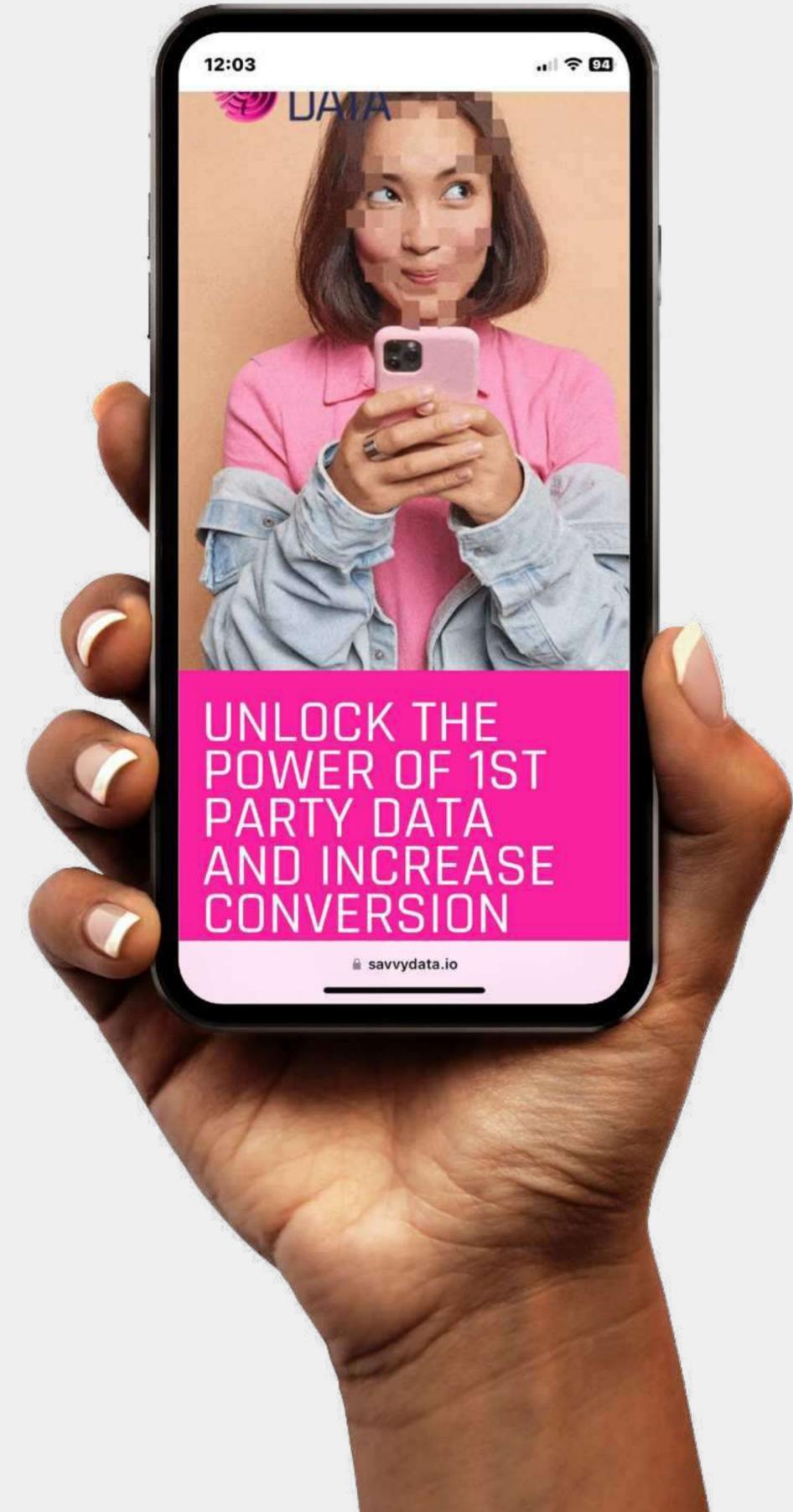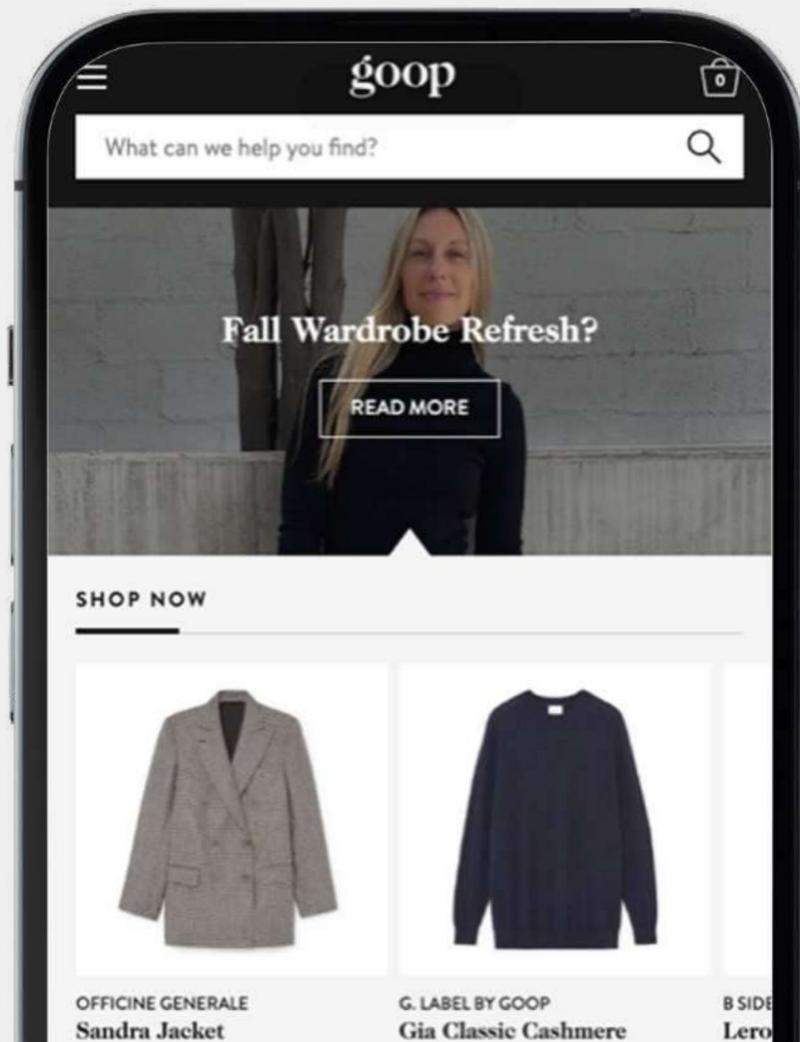
by

STEVE NOLAN

<u>Rethinking Your Data Strategy Before It's Too Late</u> provides marketers a crash coarse in advertising in a cookie-less digital world. Steve is the Co-Founder of **SAVVY DATA AI** and CEO & Founder of **WUNDERWORX** and amplify, two full-service digital agencies catering exclusively to the cannabis and CPG industries.

Marketing in a cookie-less world

Discover new ways to collect zero-and first-party data from your website, turning prospects into customers and customers into loyal brand advocates.

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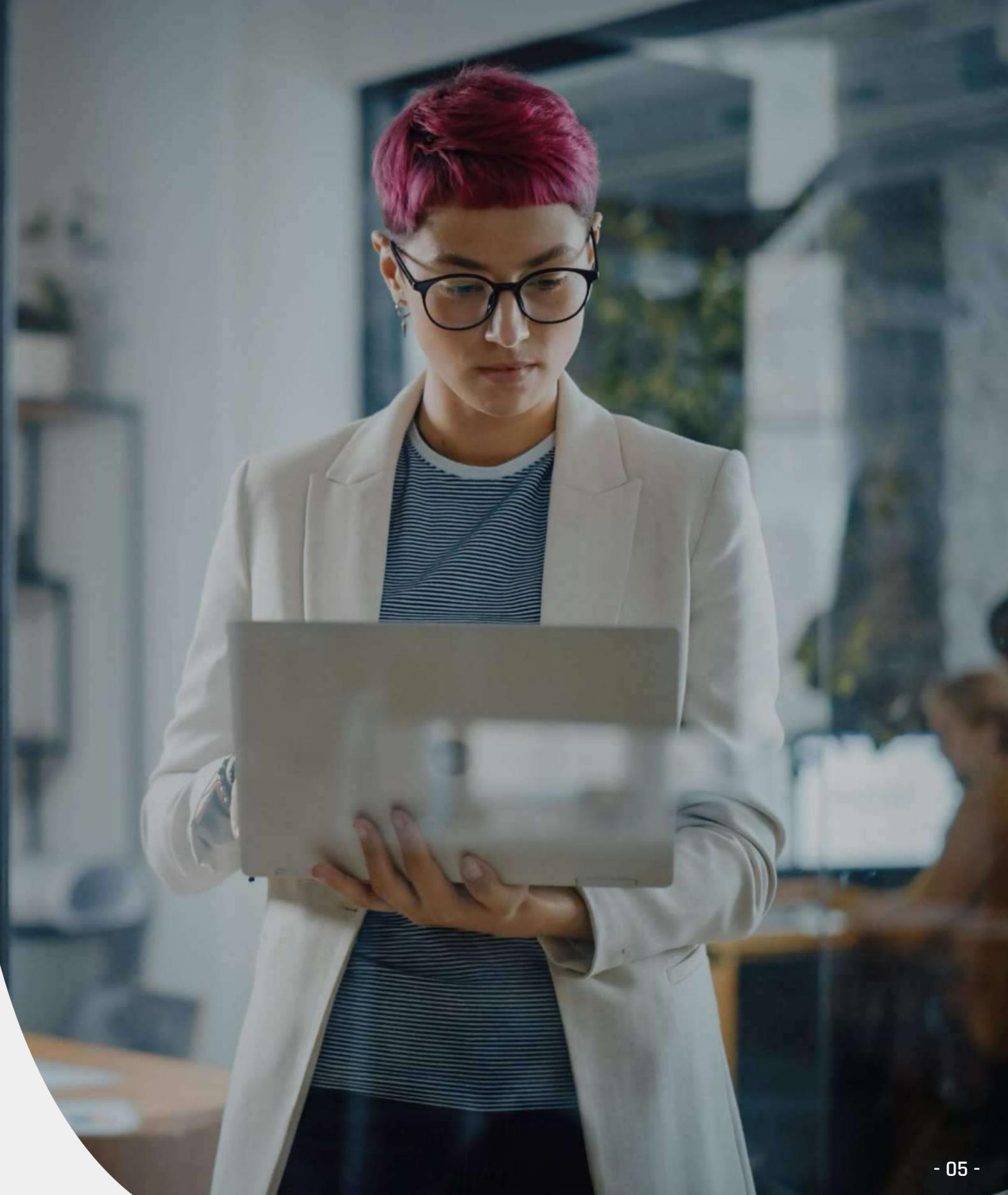
A brief history of cookies

Back in the 1990s when websites were struggling to remember who their users were, or what they did in previous sessions, Lou Montulli, a 25 year old network engineer at Netscape, invented the HTTP cookie. Today, these are simply known as cookies. Cookies have become an inevitable aspect of the Internet, helping businesses accomplish a wide variety of purposes.

Originally, Montulli set out to solve a widespread problem of the early web: Websites needed a mechanism to better remember visitors. Whenever a user loaded a new page, the website would treat them as a stranger. There were many uses for giving browsers a "memory," such as shopping carts, personalized content, logins, and other interactive features that would take advantage of such a memory.

A cookie is a small piece of code, a text file, that is stored in a user's browser when they visit a website, it tracks the user's movements on that website, collecting their basic background data. Montulli considered a range of potential solutions before settling on the cookie, as he explained in a 2013 blog post. [1]

Ironically enough, he never meant cookies to track and target customers with ads across the Internet. Yet, within two years, advertisers learned how to hack cookies and do precisely what Montulli had tried to avoid: follow people around the World Wide Web. This application of third-party cookies has benefited brands for decades. Today, the digital advertising industry is worth over $600 billion,[2] and Montulli's cookies have been responsible for a large part of that growth.

Fast forward twenty years

Cookies themselves never posed any kind of threat, but their use has become increasingly problematic—especially third-party cookies. Consumers' awareness of their online privacy has increased as well as general concerns about how consumer data is stored and more importantly, shared. Today, third-party data has quickly become second-class. In response to increasing user privacy concerns, Apple Safari, Google Chrome, and Mozilla Firefox have all announced their desire to phase out support for third-party cookies in their web browsers.

Thanks to this seismic shift in data privacy, consumers are leery about their online privacy and blame both brands and browsers. Apple led the way with announcing Safari's transition away from third-party cookies followed by Mozilla's Firefox. **Despite Google Chrome's 65% browser market share**,[3] Google has been dragging their feet, and after numerous delays of their Privacy Sandbox trials,[4] they finally announced that Chrome [5] is slated to hop on the privacy bandwagon sometime in 2024.

Let's break open Google's answer to improved consumer privacy, called the Privacy Sandbox. The premise behind the Privacy Sandbox is to allow individual user data to remain in the browser instead of allowing ad tech and ad agencies to control and sell the third-party data. The goal is to allow for privacy but still ensure consumers see personalized ads that are relevant to them.

As a consumer, if you care about online privacy, you care about cookie tracking. Prior to the **"cookie apocalypse"** that began in 2020, brands and marketers relied heavily on third-party cookies to collect data that was used to formulate their marketing campaigns. The impact of this massive policy shift on the digital ecosystem will be profound.

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Thanks to the quick demise of third party cookies, today's marketers are scrambling to revisit their data strategies. Perhaps that is why zero- and first-party customer data is now all the rage. Companies are using privacy as a marketing tool as browsers compete for users based on how safe their products are. This trend is fueling the customer experience across marketing, sales and customer support.

85% of consumers want to do more to protect their online privacy

—Norton [6]

69% of people have deleted or considered deleting a social media account because of recent breaches on the platform

—Verizon [7]

60% of consumers don't understand what companies do with their personal information

—Pew Research Center [8]

Privacy concerns drive consumers to delete cookies

% of Western consumers who regularly decline cookies and say the following describes them

	%	IDX
I worry about how companies use my personal data online	52	1.40
I worry about my government tracks me online	32	1.37
I'm comfortable with my app tracking my activity	28	1.00
I trust new technology to improve my health	25	1.08
I feel in control of my personal data online.	21	1.01
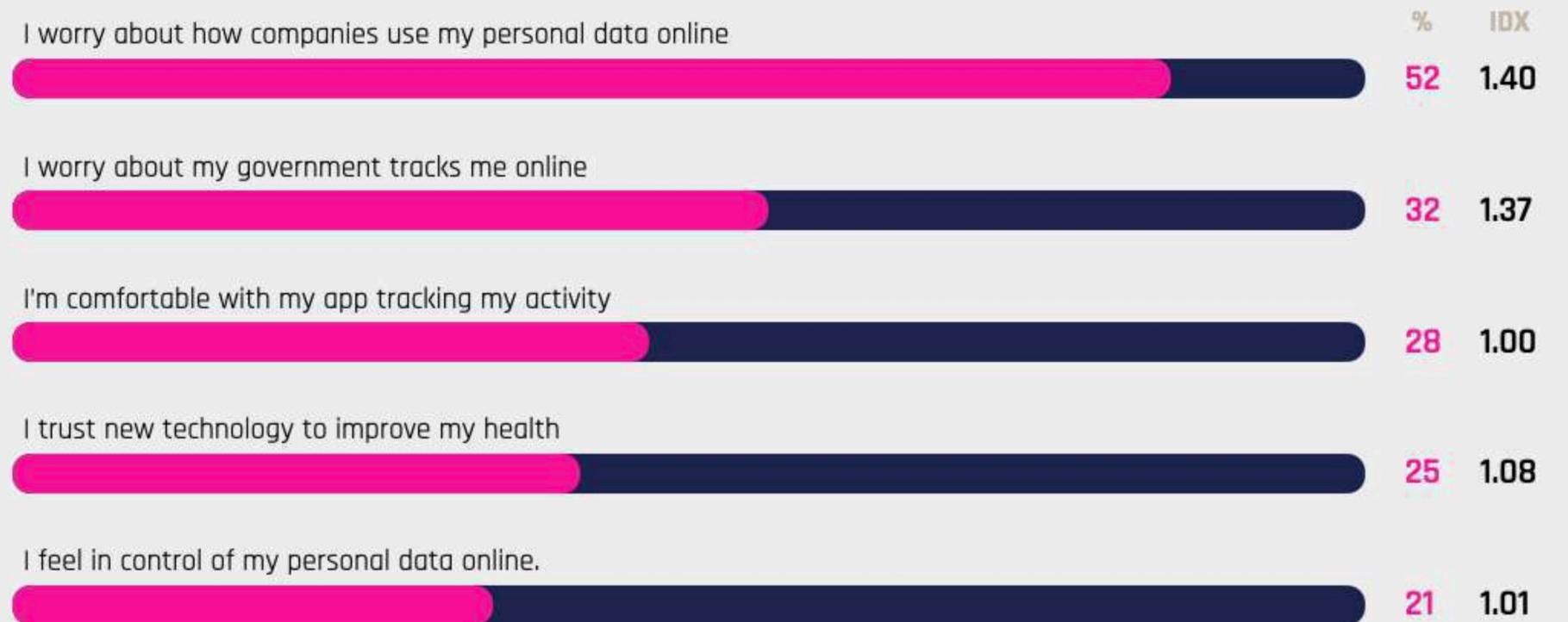
? Which of the following do you feel describes you?　　GWI Core Q3 2022

59,315 internet users in Europe/North America who say they regularly decline cookies aged 16-64

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The rise of data privacy

Recently, Ars Technica revealed that **96% of US users opted out of app tracking** in the iOS 14.5 update, where Apple enforces a new privacy policy called AppSTracking Transparency. Now, iPhone, iPad, and Apple TV apps are required to request user permission to use techniques like IDFA (ID For Advertisers) to track their activity across multiple apps for data collection and ad targeting purposes. [9]

Verizon-owned Flurry Analytics, which is used by over one million mobile apps, says **US-based iPhone users agree to be tracked only 4% of the time**. These numbers clearly show users are rejecting tracking at a much higher rate than previously projected.

Apple's move, in particular, was a game changer. Now, app developers and advertisers relying on targeted mobile advertising for revenue are seeing their worst fears come to be. On the flip side, Apple's policy change met fierce resistance from companies like Facebook, whose market advantages and revenue are built on leveraging users' data to target the most effective ads for those users.

It goes without saying that Facebook was enraged. The company went as far as to take out full-page newspaper ads in the New York Times, Wall Street Journal, and Washington Post with the headline, **"We're standing up to Apple for small businesses everywhere."** Facebook (among other Big Tech players) claimed that Apple's privacy change would not only hurt Facebook but destroy small businesses worldwide. [10]

62% of consumers said it's impossible to go through daily life without companies collecting their data

—*Pew Research* [11]
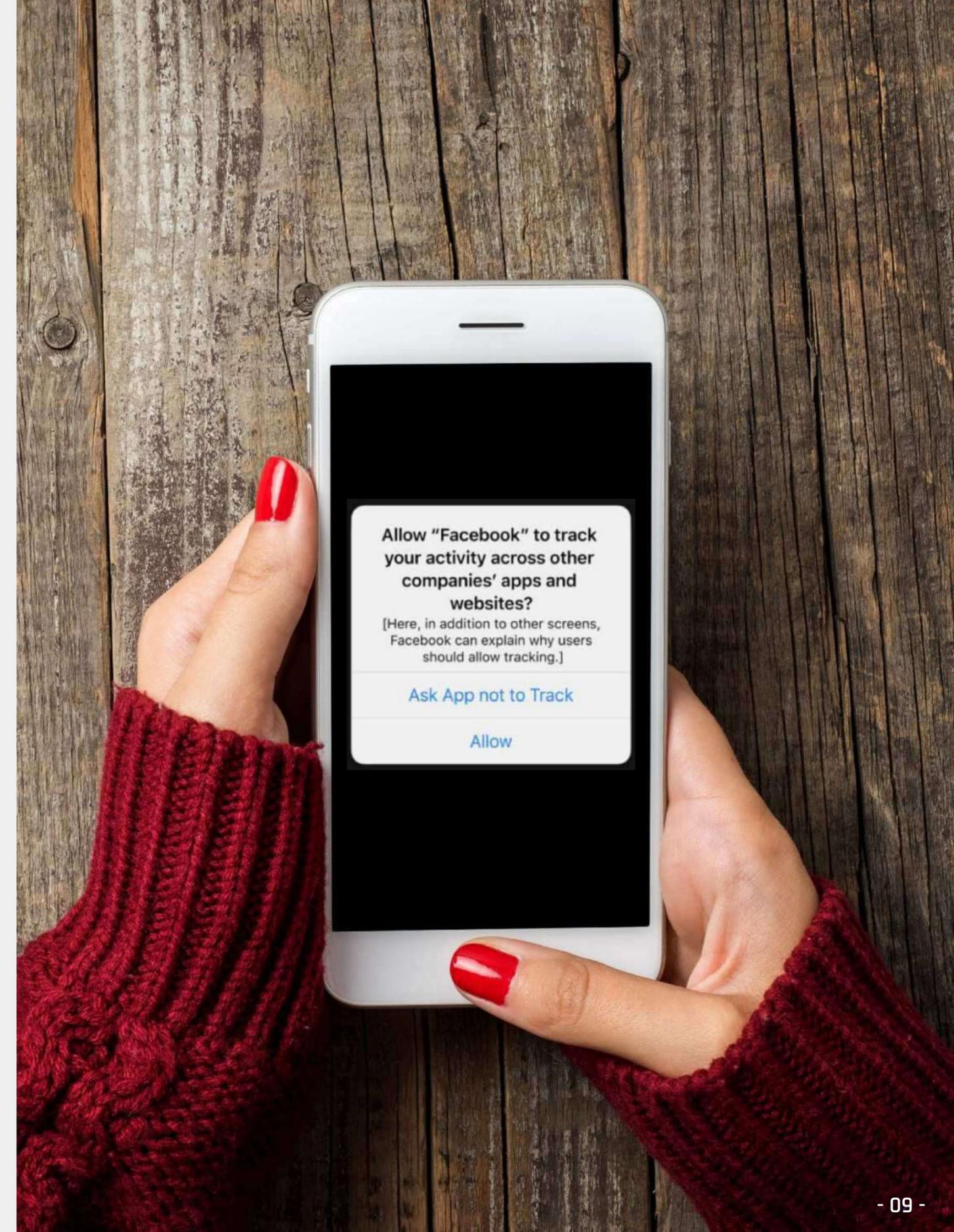
What does this mean for digital marketers?

How will a cookie-less future affect advertising? In a cookie-less world, your advertising strategy must adapt to rely less on third-party data for targeted and retargeted ads. Today, digital marketers are gathering their own zero- and first-party data on customers and exploring alternative, contextual advertising strategies.

As third-party cookie data comes to an end, we must adapt and accept a future of consent-based advertising. This means overhauling traditional marketing strategies, including reevaluating ad spend with Facebook and Google.

"It will likely take many years for a stable environment that balances standards-based data-driven advertising and consumer privacy to emerge. Marketing leaders responsible for ad budgets, media mix, planning and measurement will need to adjust strategies as Google rewires its data policies, ad products, and capabilities against a backdrop of new privacy norms and elevated antitrust dynamics." – Eric Schmitt, Senior Analyst, Garner

80% of consumers are more likely to do business with a company that offers personalized experiences

—Epsilon [12]

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The death of third-party cookies

Third-party cookies were designed to anonymously capture and store information under the control of the end users but, as we've seen, they were hijacked by ad tech companies. The entire ad-tech ecosystem was built on third-party technology—and is now being blown apart. As third-party tracking is phased out, marketers need to quickly adopt new technologies, processes, and skills to acquire and retain customers.

For over two decades, marketers have relied on third-party cookies—snippets of code that track users' activity as they surf the Internet—to deliver targeted ads based on consumers' online behaviors. But that was then, and a cookie-less world is now. Navigating these uncharted waters leaves marketers scratching their heads.

There is no silver bullet to replace what third-party cookies provide today. Adopt a strategy to expand your first-party data by leveraging modern identity resolutions solutions such as **SAVVY DATA** AI. Because the clock is ticking, U.S. mobile users are automatically blocking cookies and over 40% of desktop users are doing the same.

END OF THE ROAD

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Brands are being forced to re-evaluate their data strategies

Chief marketing officers (CMOs) need to prepare for the death of third-party cookies and third-party data. But where to start? We suggest the following:

1. Prepare for Sustained Disruption
Develop a strategy that navigates Apple and Google's new privacy changes. As cookie data collection ceases, large segments of the digital data universe will become dated—and less trustworthy. Advertisers will have to grapple with a drastically different digital ad targeting landscape. A cookie-less world will cause seismic shifts in media mix and ad spend.

2. Rethink Ad Measurement
A cookie-less world will compound an already challenging ad measurement with attribution accuracy. Marketers will have to experiment and reset expectations about baselines.

3. Get Comfortable in a Walled Garden
A cookie-less world will compound an already challenging ad measurement with attribution accuracy. Marketers will have to experiment and reset expectations about baselines.

4. Invest in Zero-Party Data Collection
CMOs need to embrace working with their heads of data technology, with the goal of understanding which zero-party and first-party data will be required for customer acquisition, retention, and relationship-building via highly personalized communications.

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Your brand's data strategy has never been more important

Today, even if customers want to protect their online privacy, they still expect consistent personalized experiences, regardless if it is in-store, online or via a mobile app. Therefore, marketers need to shift to a first-party data strategy, which means leveraging data you gather from direct interactions with customers.

Consumers are demanding privacy albeit on their terms, and browser manufacturers are acquiescing to them–forcing today's ad technology to adapt.

"Many marketers are still hung up on the notion that personalization means creating hundreds of tag lines, creative variants and more," said John Douglas, senior director of product marketing at Sizmek. **"In reality, personalization is just as much about making the experience relevant to the consumer."** [13] The difficulty that marketers experience with personalization reflects a lack of prior investments in collecting first-party data instead of third-party data.

97% of marketers agree the personalized digital experience is a cornerstone of their marketing programs
—*jebbit* [14]

90% of leading marketers say personalization significantly contributes to business profitability
—*Google* [15]

What are the most effective online tactics used vs the most difficult online tacts to execute in a digital marketing strategy for companies worldwide?

% of Respondents, Oct 2018

Content Marketing
Effective Tactics: 58%
Difficult Tactics: 49%

Search Engine Optimization
Effective Tactics: 50%
Difficult Tactics: 40%

Email Marketing
Effective Tactics: 47%
Difficult Tactics: 14%

Search and Social Ads
Effective Tactics: 34%
Difficult Tactics: 18%

Data-driven Personalization
Effective Tactics: 31%
Difficult Tactics: 63%

Marketing Technology Usage
Effective Tactics: 31%
Difficult Tactics: 41%

Social Media Marketing
Effective Tactics: 30%
Difficult Tactics: 24%

■ Effective Tactics   ■ Difficult Tactics

Source: Ascend2, 2019 Digital Marketing Strategies   **eMarketer**

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Death of third-party cookies impacts brands

Ad Targeting & Retargeting: Marketers now have less information about user behavior across the web making it more difficult to target their ads.

Attribution: As third-party cookies are no longer available to marketers, multi-touch attribution will become less reliable. While Google Privacy Sandbox is working to solve this dilemma, there is little marketers can do in the meantime.

Marketing Ad Tech: Traditional tools such as Adobe Audience Manager are getting retired. New platforms, like **SAVVY DATA** AI, have emerged to fill the void to provide brands a true middle of the funnel solution.

84% of survey respondents agreed that the potential of personalization has not been fully realized

—Insider Intelligence | eMarker

92% of marketers trust first-party Data as essential tool for driving business growth

—Convert

63% of respondents said that data driven personalization is a difficult tactic to execute

—Ascend 2

60% of SEO experts agree that Search Engine Optimization is harder than it was five years ago

—SEO Round Table

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Out with the old, in with the new

While online data privacy is a win for consumers, it leaves businesses wondering what comes next. The obvious answer is zero- and first-party data. Collecting zero- and first-party data is nothing new for brands. But many marketers are uncertain how to properly apply the first-party data they have. Often this data is stored in disparate systems, may be outdated, or is incomplete.

A recent survey among marketing leaders shows that 92% of them trust first-party data as an essential tool for driving business growth. [16] Those surveyed believe that understanding what customers want is a critical factor in marketing success. Because customer data is such an evolving issue , marketers are still wrapping their heads around compliance rules, data breaches, GDPR, and the ever changing social media algorithms. It's more difficult than ever for companies and marketing teams to adopt best practices and navigate the murky legal regulations. Everything is a moving target.

The ever changing nature of the Internet, platforms, data, ad-tech, and online privacy rules are challenging the proven paid media strategies of the past. All because brands will no longer be able to retarget traffic off property to help influence qualified returning traffic.

The trend of social media de-platforming is forcing brands to revisit their social media strategies altogether. Coupled with the challenges of Google's recent algorithm updates, and it can feel like there is no safe zone to strategize in. Marketers are having a tough go at creating sustainable growth in a post-cookie world. In a recent survey of 190 marketing influencers worldwide conducted by Ascend2, **63% of respondents said that data driven personalization is a difficult tactic to execute**. With shifting data privacy regulations, coupled with rising ad costs, and the ongoing recession, today's marketers have been left scratching their heads.

77% of consumers say they favor brands that ask for and accept customer feedback
—fresh lime [17]

80% Of consumers who identify as frequent shoppers say they only purchase with businesses that tailor their experience
SmarterHQ [18]

Introducing zero-party data

Zero-party data is a relatively new term in the marketing lexicon. Originally coined by Forrester in 2022, zero-party data is information a customer voluntarily provides by actively sharing it. Zero-party data is often described as the **"Holy Grail"** or the future of marketing.

What makes it so special is that consumers provide their own data to improve their shopping experience and personal relationship with the brand. This data can range from contact information and birthdates to preferred product categories.

Zero-party data is information that is hard to infer or buy from a user. It's seen by many in the industry as one of the most promising data collection solutions in today's cookie-less world.

Yes third-party data has long been regarded as the king of the hill, zero-party and first-party data are quickly becoming the challengers. Brands that want to carve out that competitive advantage should start paying more attention to these new and frequently overlooked data types. Crafting a well thought out comprehensive zero-party data collection solution will help brands bridge the gap left by third-party cookies.

Third-party data is data obtained from a third-party source, such as a research firm or any other external service provider. Third-party data is often compiled from a number of different sources. More and more, the reliability of third-party data is being questioned.

Third-party data can also be less detailed, such as IP addresses (Internal Protocol addresses for computers or devices, a unique IP address assigned to each Internet or network device). Google Analytics, for example, can tell you where your website visitors are coming from by leveraging IP addresses, but they don't tell you **who they are**.

One of the key benefits of zero-party data is that it's more trustworthy than second or third-party data. Two other benefits of zero-party and first-party data are the quality of the data and the fact that both minimize privacy concerns because you know exactly where the information came from.

"Zero-party data is the new oil."

—Vlad Gozman, CEO & Founder, involve.me

97% of marketers agree the personalized digital experience is a cornerstone of their marketing programs
—jebbit [12]

80% of consumers are more likely to do business with a company that offers personalized experiences
—Epsilon [17]

15% of brands will collect zero-party data this year
—Forrester [19]

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Data defined: zero, first, second, and third-party data

Now, more than ever, where brands get their data matters. Understanding the differences between the different types of data is paramount to formulating the right winning strategy.

First-party data is the information that The key difference between first-party data and zero-party data is that customers generally provide supply first-party data as as required for purchase or to receive an online offer, like a newsletter, downloadable lead magnet, or for information during the check-out process of purchasing a product online, when signing up for an offer or newsletter, or taking an online survey.

Zero-party data is more engaging. Consumer data comes in many different forms. It can be very detailed, giving marketers explicit information such as names, home addresses, email addresses, phone numbers, household income, and other demographic data., and bBrands that use it properly can create more personalized customer experiences, which leads to higher engagement rates and increased customer lifetime value.

Second-party data, on the other hand, is collected from another trusted source. An example of second-party data would be a grocery store selling its customer loyalty data to a credit card company.

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Introducing zero-party data micro-engagements

The concept of micro-engagements is not new, and has long been a way to connect the fragmented digital consumer journey. The initial concept called micro-moments was introduced by Google in 2015 as **"an intent-rich moment when a person turns to a device to action on a need-to know, go, do, or buy."**

Games and interactive digital campaigns are just one example of micro-engagements. 69% of consumers say they favor a brand that offers games and uses interactive marketing campaigns with prizes. [20]

Here is a good example of a micro-engagement. Purina asked customers what breed and age of dog their customers have so they send them appropriate coupons and newsletters. This is a great example of using a soft, subtle way to ask customers to provide intimate data–in this case, about their beloved pets. [21]

Mico-engagements like these are a great way to avoid survey fatigue and instead position your brand positively in the customer's psyche, subtly nudging them to engage and increase customer loyalty, to eventually drive sales. It is important that in your efforts, you don't smother users with questions and asks, which is why when collecting zero-party data, it is critical that you only collect data that you are going to use.

Acquiring a new customer is 5X as expensive as retaining an existing customer. Which means, if you **increase customer retention rates by 5%** it increases your **profits by 25 to 95%.**[22]

With numbers like these, it's easy to see why brands are forging new ground with zero-party data collection. It's time to think outside of the box as to how to engage, provide value, and gather personal data from consumers.

69%
of consumers say they favor a brand that offers interactive marketing campaigns

—Mediapost
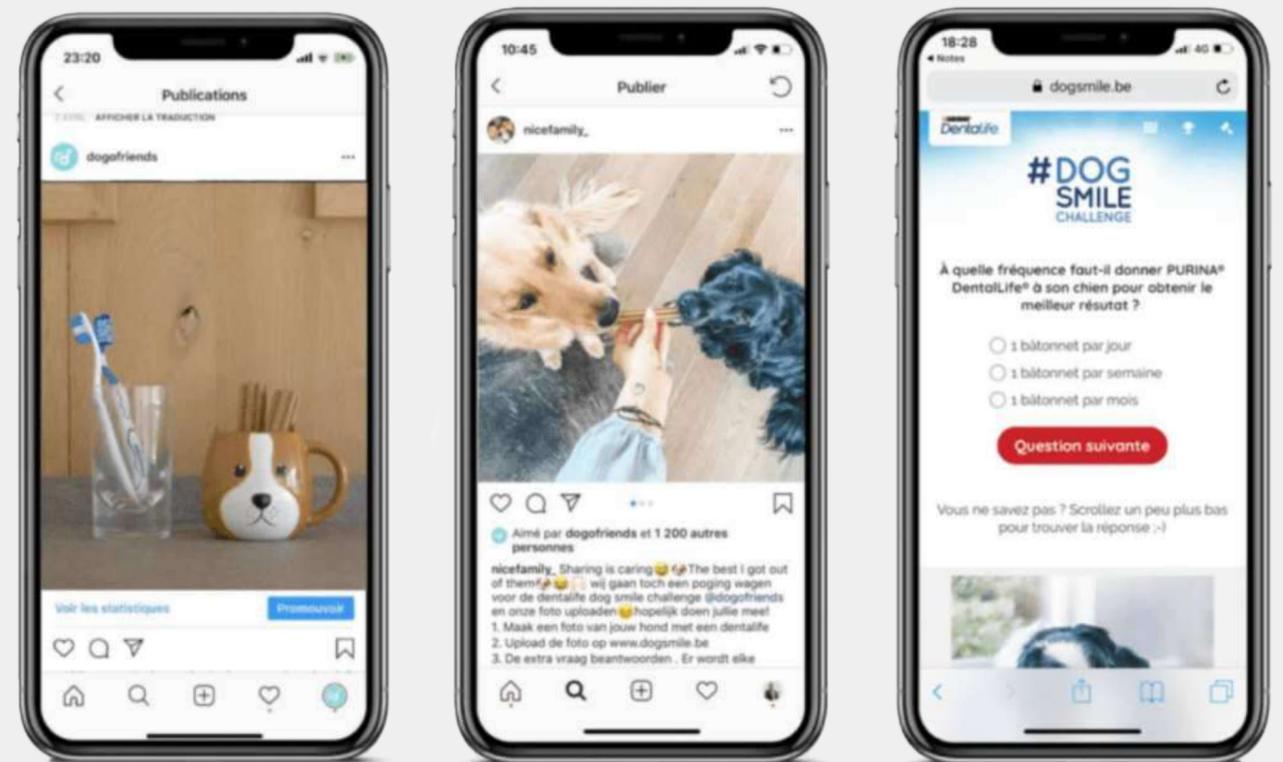
Say hello to first-party data

Today's always-connected, digital-savvy consumers are calling the shots, defining how they want to interact with brands. They are demanding more value and hyper personalized experiences. In turn, brands are thinking of creative ways to engage and build long-term relationships.

While zero-party data is **willingly provided by consumers**, first-party data is **gathered from user interactions with a company's website, mobile apps, or brick-and-mortar stores**, providing indirect insights into consumer behavior.First-party data is essential because it's collected directly from your own audience.

First-party data includes:

- User behavior on websites or apps
- Demographic data
- CRM data
- Subscription data
- Social media data
- Email data
- Survey data
- Purchase history
- Customer survey data

First-party data is important because it's collected from the people you have the most to learn from—**your own prospects and customers**. Access to this information allows you to nurture your audience based on what you've learned from them. Most importantly, first-party data enables you to personalize your client communication.

First-party data is considered one of the most trustworthy and transparent data to have because you own it. With a cookie-less future just round the corner, it's more important than ever that brands embrace gathering and controlling their own first-party data.

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Why you should segment your audiences

Audience segmentation helps you bring order to the chaos of modern consumerism. It is the act of dividing your larger audience into smaller, distinct groups—or segments—based on shared characteristics such as demographics or purchase history, behaviors, and preferences.

With marketing departments under more pressure than ever to tighten budgets and rethink their spend, it's crucial to make sure marketers are actually listening to the data. You can't rely on a one-size-fits-all approach anymore. You've got to segment to personalize and humanize your strategy to drive engagement, conversions, and ultimately turn prospects into customers and customers into advocates.

By personalizing your marketing communications to the unique needs and preferences of each segment, you create more relevant and engaging campaigns, driving higher customer engagement, delivering better results.

Why audience segmentation should be a cornerstone of your Data Strategy can be summed up with these recents marketer stats and trends:

- **80% of companies** that use market segmentation report increased sales (Marketo)
- The most common segmentation criteria are **demographics**, **psychographics** and **behavior** (Lotame)
- Segmentation can help businesses **increase their conversion rate by up to 50%** (DemandMetric)
- Segmentation can help businesses **reduce their marketing costs by up to 30%** (Marketing Donut)
- Segmentation can help **improve customer lifetime value (CLV) by 25%** (Lotame)

92% of leading marketers believe using first-party data to continuously build an understanding of what people want is critical to growth
—*Google* [15]

58% of revenue is generated thanks to segmented and personalized emails
—*HubSpot* [23]

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Elevated audience segmentation

" **The old way used to be segmenting by just one attribute, the new sweet spot is segmenting by three to five attributes.** "

—**Jim Donovan, Vice President at ZoomInfo**

One of the great benefits of having **SAVVY DATA** AI is the instant access it gives you to our North American Consumer Database of **245 million Americans** and **25 million Canadians adults**.

On average, our visitor identifications include not only demographic data, but also up to 400+ data points including household income, home and email addresses, education, interests and hobbies. More importantly, **SAVVY DATA** AI customers can upload their own CRM database and appended with our consumer database providing even more insight for brands.

"We've been customizing our outreach by using IP detection software. It translates the site visitor's IP address into the associated company name. We can see exactly where they go on our site with analytics based on the specific visit. We are then able to follow up accordingly in a highly customized manner, already understanding the specific content in which they are interested." – Tom Shapiro, Stratabeat

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How to segment audiences

Listed below are some of the most common forms of segmentation:

Demographic Segmentation: grouping audiences by age, gender, household income, education, ethnicity and other demographic data allow you to target specific groups. Example: Health & Wellness vitamin company targeting active baby-boomers.

Geographic Segmentation: segmenting audiences based on their location helps you customize imagery of your communication. Example: A brand wanting to promote outdoor activity imagery in the fall should have different imagery for audience segments in the northeast versus Florida.

Online Behavioral Segmentation: understanding what pages your prospective customers are visiting and the various products that they are interested in is important. Example: an online clothing retailer should send an offer based upon whether the users were shopping for female or male clothing.

Purchase History Segmentation: this type of segmentation leverages past purchase history in order to offer personalized recommendations and promotions. Example: an online CBD Beauty & Wellness retailer should be segmenting their customers from Health and Wellness segments, Skincrare Enthusiasts, and perhaps even Pet Owners who purchase CBD treats for their animals.

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" **The top 10% of your customers spend 3X more per order and the top 1% of your customers spend 5X more than the lower 99%.** "

—RJ Metrics | peertopxeermarketing.co

Sales Funnel Segmentation: segmenting audiences based upon where customers are in their buying journey. Online retailers should send out personalized offers based upon where their identified audience is on their buying journey. For example:

Prospective Customers: Depending upon the nature of your service or product, some online companies may place a high value on educating first-time buyers, may want to develop an automated email campaign targeting these first-time buyers who have spent time reading the company's blogs and FAQ page.

New Customers: Targeting consumers who have recently signed up for an offer and placed their first order should receive a welcome message thanking them for their order and ask them if they would like to keep track of the status of their order via email or SMS messages. Should the customer select SMS messaging then this customer should be then further segmented into a New Customer SMS segment for future communications.

Active Customers: Customers who have been purchasing on a regular basis should be rewarded with customer loyalty points or personalized recommendations based on their product purchase history. Active customers should be further segmented based upon their spend. Are they buying only products that are on the lower end of your products or services versus middle of the road or very high end products. By understanding their spend, crafting future communication will provide better results because your customizing their offers.

Churned Customers: Former customers who have gone dark or canceled their subscription should receive win-back offers based upon their previous purchases to incentivize them to come back. Another tactic may be to send a survey to better understand the reasons behind their decision to leave.

VIP Customers: Loyal customers who place large frequent orders on a regular basis and are brand advocates. These VIP customers should be segmented from the other customer segmentations and treated with white glove customer service and special treatment.

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Time to get personal

Because first-party and zero-party data is so trusted, when used properly, marketers can fashion experiences that are tailored to an individual's needs and wants—which builds loyalty. Today's consumers need each and every experience to feel relevant. The power of personalization is undeniable:

- **91% of consumers** are more likely to shop with brands that recognize, remember, and provide relevant offers and recommendations
- **32% of customers** expect a tailored discount **just an hour after identifying themselves to a company**, and **54% within 24 hours**.
- **Nearly half of customers** make an impulse purchase as a result of personalization, and **85% of them** were happy with their purchase.
- Personalized calls to action converted **202% better**.[24]
- **69% of customers** were willing to exchange personal data for a better, more personalized service.
- **70% of millennials were willing to allow tracking** of their browsing and shopping behaviors in exchange for a better shopping experience.
- **47% of consumers will go to Amazon** if an online brand they're shopping with doesn't provide **relevant product suggestions**. [25]

The era of marketing one-to-many is gone

When it comes to sharing personal information, **23% of consumers stated they are more willing to share their information** with brands than they were just one or two years ago. In fact, consumers are most willing to share their personal information to receive ads that are more relevant based on:

Category	Percentage
Likes & Dislikes	60%
Gender	47%
Location	30%
Birthday	21%
Browser History	11%
Employment	11%
Income	08%
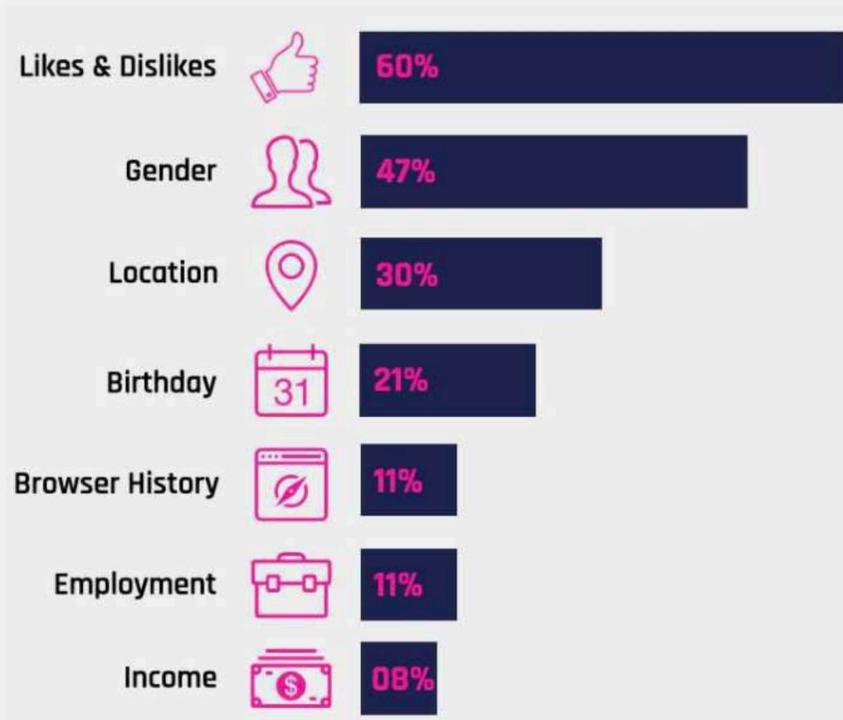
Because zero- and first-party data is controlled by you, the brand you get a unique opportunity. Collected on your websites and apps, it means your data can flow in real time from the moment it is collected, connecting consumer data to systems that deliver enhanced customer experiences.

By segmenting their consumer data based on purchase history and product preferences, you can create different versions of your message thereby increasing personalization that will resonate with your consumers.

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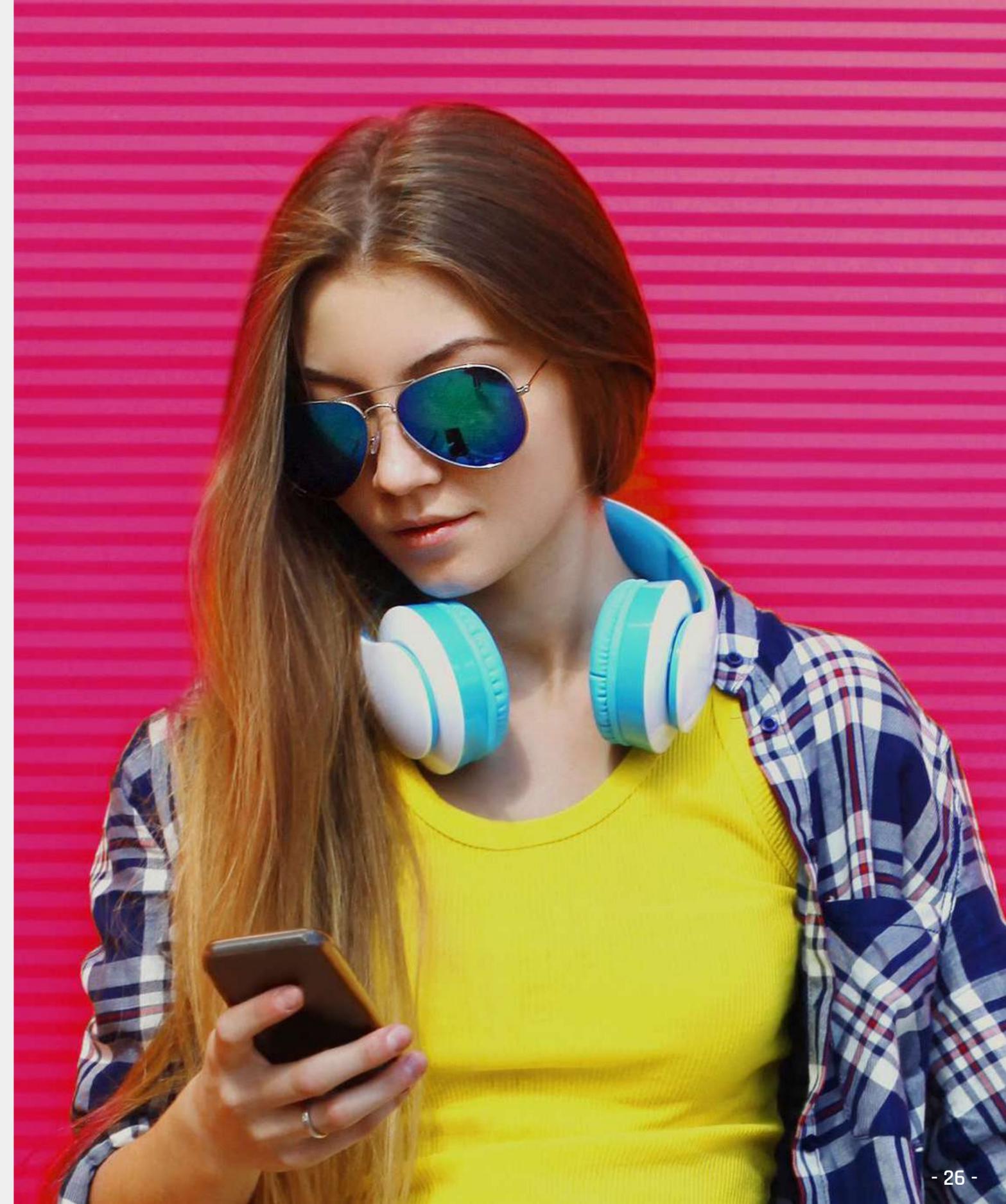
How to implement personalization

The more you know about your audience, the easier it is to tailor your message to strike the right chord. Today, consumers are drawn to personalized ads that make them feel seen, heard, and understood.

Smart brands know that the more personalized they can make their messaging, the more likely a customer is going to respond to it. Creating personalized content, marketing strategies, and customer experiences is all about good quality data and the way you use it.

The key takeaway: Personalized marketing isn't just a tactic for building brand trust and improving the customer experience. When done right, it presents endless opportunities to improve sales. Look at your audience segments and validate your assumptions.

Brands that combine consumer data with ad tech are delivering individualized messaging, products, and experiences to customers in more innovative ways than ever before.

According to Forbes Agency Council, "**Today's savvy and skeptical consumers can detect a generic mass-marketing campaign from a mile away, so it's worth it to go the extra mile and tailor your ads and content to smaller, more specific consumer niches [i.e. segments].**" [26]

> **The promise of personalized, one-to-one marketing might have been a pipe dream. Now it's all about ensuring your offers strikes the right chord.**
>
> —**Steve Nolan, Co-Founder, SAVVY DATA** AI

06% of businesses can properly consolidate data into a single representation of the customer for tailored experience across channels
—*Dynamic Yield* [27]

90% of customers are open to disclosing their behavioral data in exchange for extra perks that make purchasing cheaper or simpler
—*SmarterHQ*

53% of brands Clain first-party data provides them with high-quality data for personalization
—*Segment* [28]

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Here are some ways marketers can personalize their messages to various segmented audiences:

User Generated Content: Costly content does not always equal higher conversion rates. User Generated Content (UGC) can be the most effective. Measuring data via tracking pixels and from social media is a worthy consideration.

Get Interactive: Consider creating a survey, an online quiz, or a game that allows your audience segments to inform you what type of content that is relevant to their specific needs.

Always A/B Test: Don't assume your message or promotion will resonate. Take the extra effort to test different subject lines in your emails. Try different images or offers. Analyze with A/B test emails to a smaller sample of your audience segment before sending it out to the entire segment.

Generational Triggers: Marketers need to be reminded that the various demographics can play a significant trigger. For example Baby Boomers want to see coupons and imagery that reflects their generation whereas Gen Z wants to know what your brand is doing on the social equity front.

90%
of leading marketers say personalization significantly contributes to business profitability

—*Google* [15]

77%
of customers are annoyed when they receive push notifications or text messages for promotions they aren't interest in

—*Segment* [28]

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Personalization matters

Now more than ever, personalization matters. The surge in online interactions since the onset of the pandemic escalated expectations—giving consumers more exposure to powerful personalization practices from the big eCommerce players, which is raising the bar for everyone else. From web to mobile to in-person interactions, consumers now view personalization as the default.

Personalization means something different to everyone.

EPSILON

How consumers interpret personalization:

32%
Customization

32%
Service

16%
Discount Offers

8%
Specific Products or Services

7%
Convenience

"It means its something suited to me exactly so that I'm more likely to be interested in what they're selling.

"It means that the company will know what you want, your likes and dislikes and make sure you have what you want."

"They offer personalized offers, products and coupons that meet your needs and are items you typically buy."

"...dedicated shopping assistant, order puller—have the order ready. Curbside service, disabled entry doors."

"It means noticing how I shop/surf the Internet and customizing advertising and shopping options to my preferences."

Research shows that **71% of consumers expect companies to deliver personalized interactions**—and **76% get frustrated when this doesn't happen**. Now, if consumers don't like the experience they receive, it's easier than ever for them to choose something different; [29] **75% of consumers switched to a new store, product, or buying method during the pandemic.**[30]
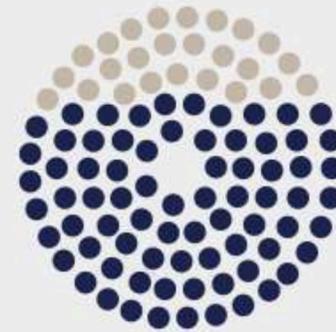
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It's so much easier to personalize the branding experience for every single customer, so there's simply no excuse not to.

—Jared Gray, Co-Founder, **SAVVY DATA** AI

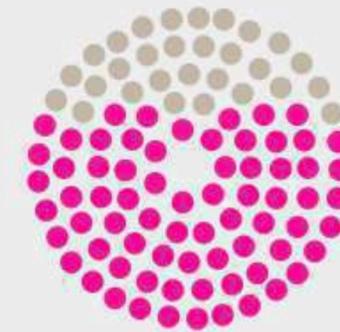## Non-personalized communication pose a business Risk in low-loyalty environment.

Loyalty is up for grabs...

...and consumers expect personalization from the brands and businesses they choose.

75%
of consumers tried to a new shopping behavior during the pandemic [1]

71%
of consumers expect personalization [2]
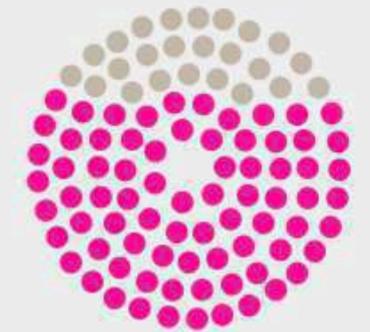
76%
of consumers get frustrated when they don't find it [2]

[1] Question: "Since the coronavirus (COVID-19) crisis started, which of the following have you done?" 25% of consumers selected "none of these." Possible answers" "new shopping methods"; "different brand"; "different store, retailers, or website"; "private label or store brand"; "new digital shopping method."

[2] Question: "Please indicate how much you agree or disagree with the statements below when it comes to personalized communications and products/services from brands/businesses: I expect personalized communications and products/services tailored to my needs from the brands/businesses that I buy from. It is frustrating when a brand/business shows or recommends me things that are not relevant to me." Possible answers: "strongly disagree"" "disagree"; "somewhat disagree"; "somewhat agree"; "agree"; "strongly agree." Numbers shown indicate respondents that selected "somewhat agree"; "agree"; and "strongly agree."

Source: McKinsey Next in Personalization 2021 consumer survey 9/1-9/2 2021 (n=1,013), sampled and weighted to match the US general population 18+ years; McKinsey Consumer Pulse Survey 8/25-8/31/2021 (n=2,094) and 2/18-2/22/2021 (n=2,076), sampled and weighted to match the US general population 18+years.

McKinsey & Company

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Research shows shoppers are demanding personalization

According to McKinsey & Company, shoppers have a strong point of view on personalization. **72% said they expect the businesses they buy from to recognize them as individuals and know their interests**.

When asked to define personalization, consumers associate it with the positive experience of being made to feel special. They respond positively when you invest in the relationship, not just the transaction. Thoughtful touch points such as checking in post-purchase, sending a how-to video, or asking consumers to write a review generate positive brand perceptions. [31]

90%
of leading marketers say personalization significantly contributes to profitability
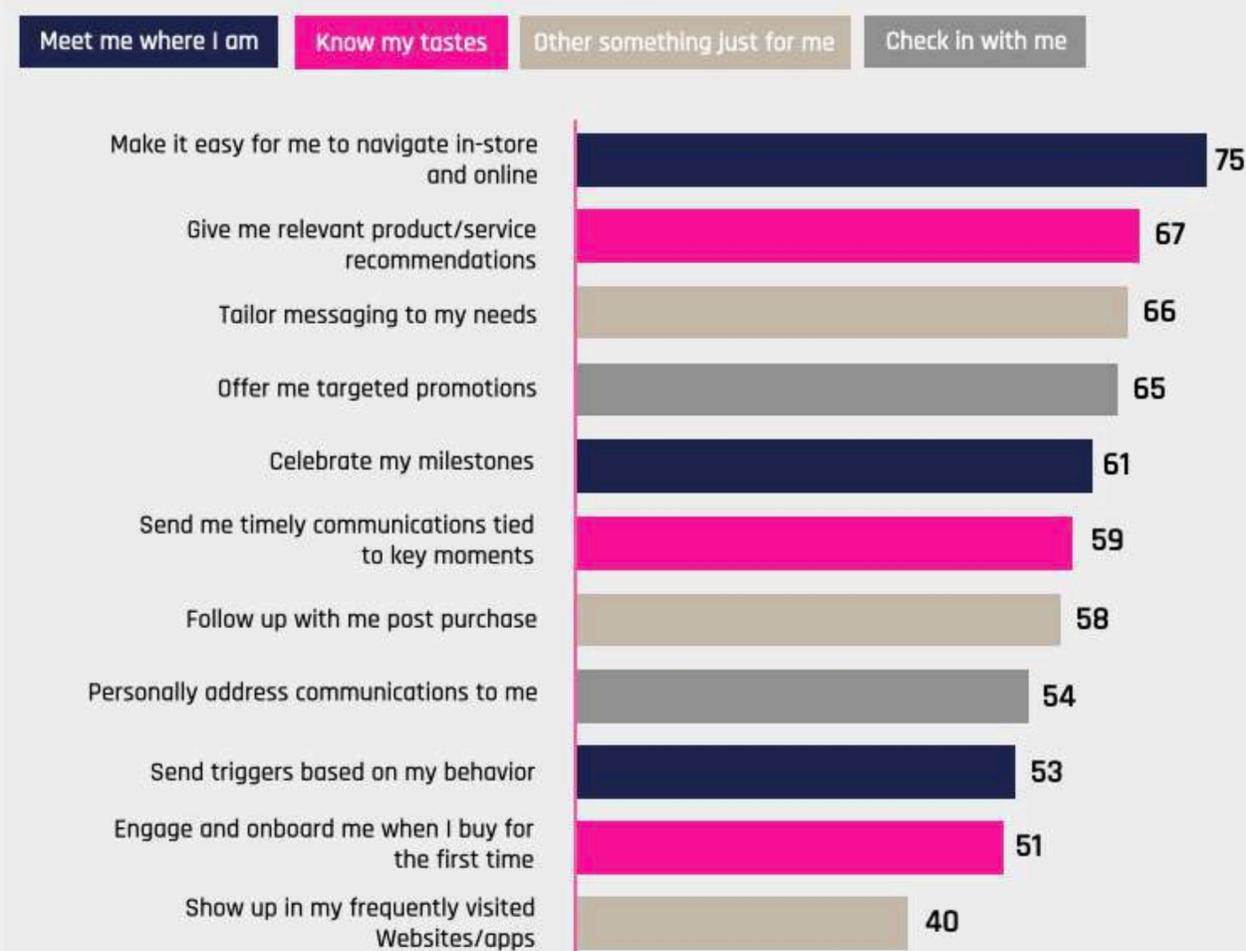—*Google* [15]

91%
of consumers are more likely to shop with brands that recognize, remember, and provide relevant offers and recommendations
—*Accenture*

69%
of customers appreciate personalization as long as it based on data they have shared with a business
—*Segment*

62%
of marketers say that personalization is the most effective technique
—*HubSpot* [23]

Consumers expect brands to demonstrate they know them on a personal level.

Importance of personalization actions for consumers purchasing for the first time, % of respondents [1]

Legend: Meet me where I am | Know my tastes | Other something just for me | Check in with me

Action	Value
Make it easy for me to navigate in-store and online	75
Give me relevant product/service recommendations	67
Tailor messaging to my needs	66
Offer me targeted promotions	65
Celebrate my milestones	61
Send me timely communications tied to key moments	59
Follow up with me post purchase	58
Personally address communications to me	54
Send triggers based on my behavior	53
Engage and onboard me when I buy for the first time	51
Show up in my frequently visited Websites/apps	40

[1] Question: "We would like to know how each of these aspects influences your decision to buy from a brand/business for the first time. For that brand/business, please indicate how important each of the following aspects is." Possible answers: "not all important"; "somewhat important"; "important"; "very important"; "extremely important." Numbers shown indicate respondents that selected "important"; and "extremely important."

Source: McKinsey Next in Personalization 2021 consumer survey 9/7-9/8/2021 (n=1,013), sampled and weighted to match the US general population 18+ years

McKinsey & Company

SAVVY DATA AI

Consumers reward those brands who get it right

76% of consumers said that receiving personalized communications was a **key factor in prompting their consideration of a brand**, and **78% said such content made them more likely to repurchase**. Personalization is especially effective at driving repeat engagement, aka loyalty, over time. Plus, recurring interactions create more data from which you can design ever-more relevant experiences. It's a flywheel effect that generates long-term customer lifetime value and loyalty.
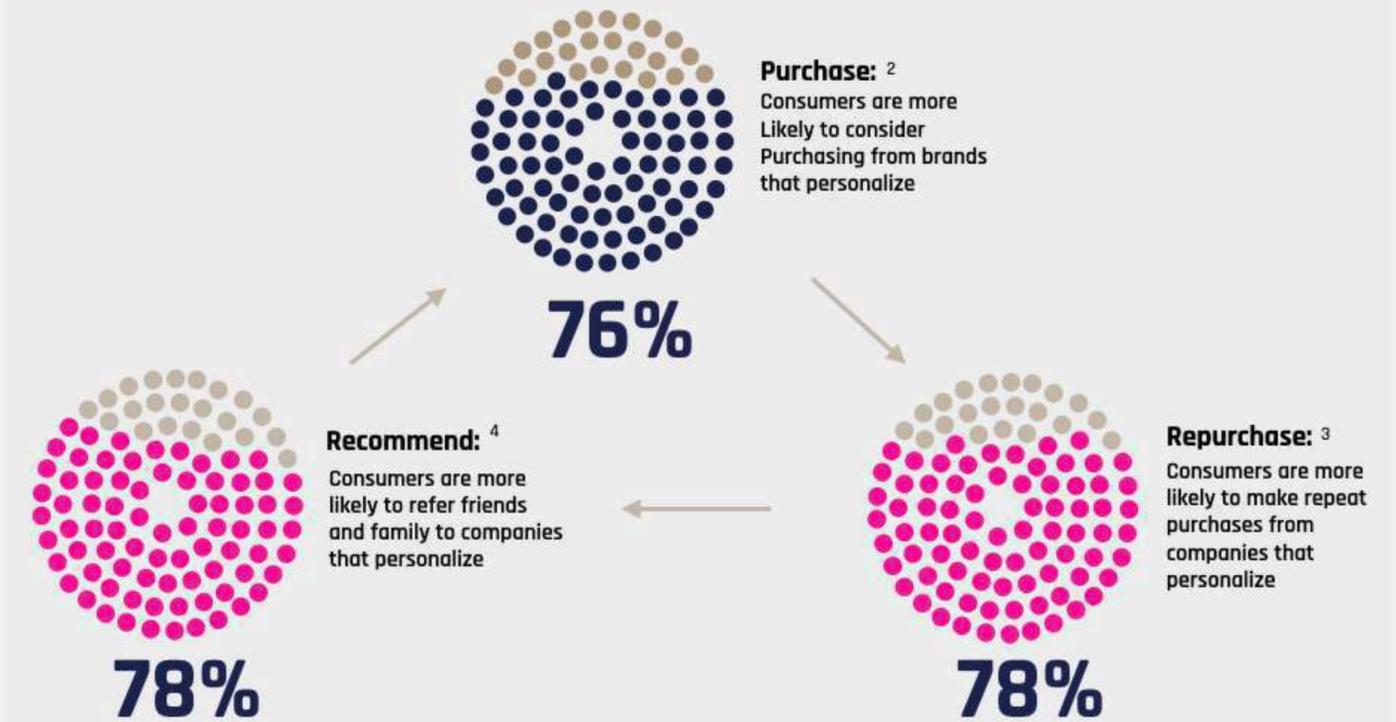
73% of brands saw accelerated pipeline and increased sales
—Demand Gen [32]

90% of leading marketers say personalization significantly contributes to profitability
—Google [15]

53% of brands improved their ability to define ideal customer profile
—Demand Gen [32]

Personalization directly influences buying behavior across the customer lifecycle.

Likelihood to purchase, recommend, and repurchase depending on personalization, % of respondents [1]

Purchase: [2]
Consumers are more Likely to consider Purchasing from brands that personalize

76%

Recommend: [4]
Consumers are more likely to refer friends and family to companies that personalize

78%

Repurchase: [3]
Consumers are more likely to make repeat purchases from companies that personalize

78%

[1] Question: "Since the coronavirus (COVID-19) crisis started, which of the following have you done?" 25% of consumers selected "none of these." Possible answers" "new shopping methods"; "different brand"; "different store, retailers, or website"; "private label or store brand"; "new digital shopping method."

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Source: McKinsey Next in Personalization 2021 consumer survey 9/1-9/2 2021 (n=1,013), sampled and weighted to match the US general population 18+ years; McKinsey Consumer Pulse Survey 8/25-8/31/2021 (n=2,094) and 2/18-2/22/2021 (n=2,076), sampled and weighted to match the US general population 18+years.

McKinsey & Company

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Performance propels outperformance

McKinsey's research showed that **personalization drives 10% to 15% revenue lift** (with company-specific **lift spanning 5% to 25%**, driven by sector and ability to execute). The more skillful a company becomes in applying data to build intimate customer knowledge, the greater the returns. For digitally native companies that forge a data-backed, direct-to-consumer model, personalization isn't just how they market, it's how they operate.

- **80% of audiences** tend to do business with a brand that personalizes their experience with it. That is why it is important to segment your audience to send them tailored marketing communications.
- **75% of brands create content for 3 ore more segments**. However, only **4% of marketers** use multiple types of data for segmentation, **while 42% of them don't segment at all.**
- **80% of companies that use market segmentation report increased sales**.
- The average brand uses **3.5 different segmentation criteria**.
- Marketers who segment their email lists by purchase history see a **10% increase in opens and a 15% increase in clicks**.
- Segmented campaigns had **14.31% higher open rates** and saw **101% more clicks** than non-segmented campaigns.
- Email marketers who segmented their audience before campaigning stated that the **revenue generated increased to up to 760%**.

Digitally native companies drive more revenue from personalization than other company archetypes.

Company archetype	Companies without direct relationship (CPG)	Brick and mortar (grocery, apparel)	Digitally native (DTC Brands)
Strength of Customer relationship	Low	Medium	High
	• Typically does not own customer transaction • Limited access to or use of 1st-party data	• Owns customer transaction, not always product development • 1st-party data captured but mixed	• Owns customer transaction and product development • 1st-party data at heart of decision making
% of revenue driven by personalization [1]	**5% to 10%**	**10% to 20%**	**25%**

[1] Question: "What percentage of your revenue comes from personalized marketing actions/or tactics?" Possible responses: values from 0 to 100%.
Source: McKinsey Next in Personalization 2021 consumer survey 9/7-9/8/2021 (n=1,00), sampled among consumer businesses.

McKinsey & Company

Those leading the charge in personalization also have better customer outcomes. Data-driven leaders are focused on the relationship and long-term value for better upward migration, retention, and loyalty.

Companies that drive greater revenue impact from personalization (eg, digitally native) have better customer outcomes.

- ■ Companies without direct consumer relationship (eg, CPG)
- ■ Brick and mortar (eg, grocery, apparel)
- ■ Digitally native (eg, DTC brands)

Better at managing 'one and done'

% of new customers that repurchase in the following year. [1]

75	74	81
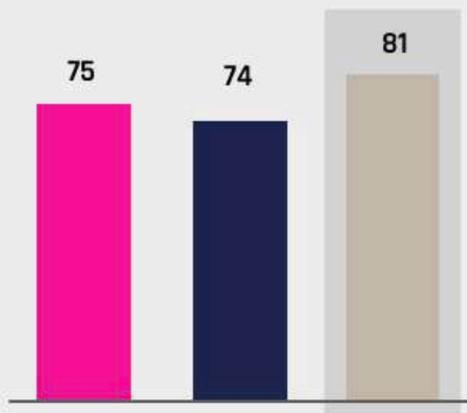
Better at driving upward migration

% of active customers upwardly migrating per year [2]

18	21	36
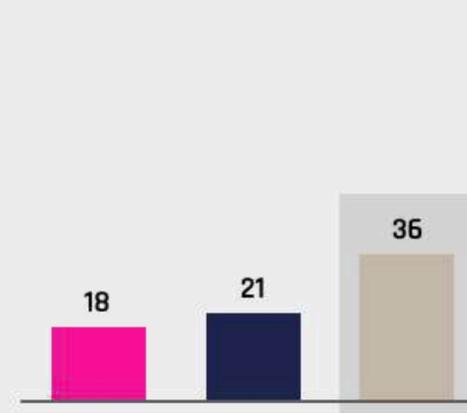
Getting more from loyalty

% of sales linked to customers with loyalty ID [3]

29	44	53
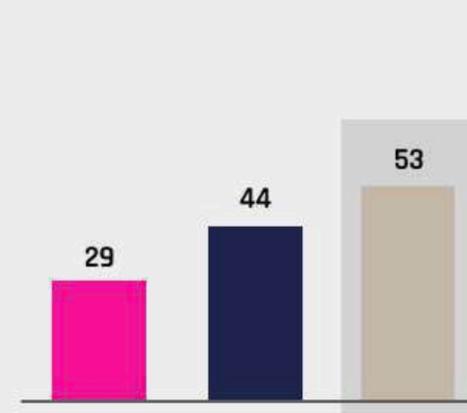
[1] Question: "What percentage of new customers repurchase in the following year?"
[2] Question: "What percentage of your active customers (any customer who made at least one purchase in a given year) are upwardly migrating per year (ie, spending more this year than last year)?"
[3] Question: "What percentage of revenue is tied to customers that are part of your company loyalty program (eg, 80% of sales are tagged with loyalty ID)?"
Possible responses: values from 0 to 100%.

Source: McKinsey Next in Personalization 2021 benchmarking survey, 2/7–2/14/2021 (n=100) sampled among consumer businesses.

McKinsey & Company

SAVVY DATA AI
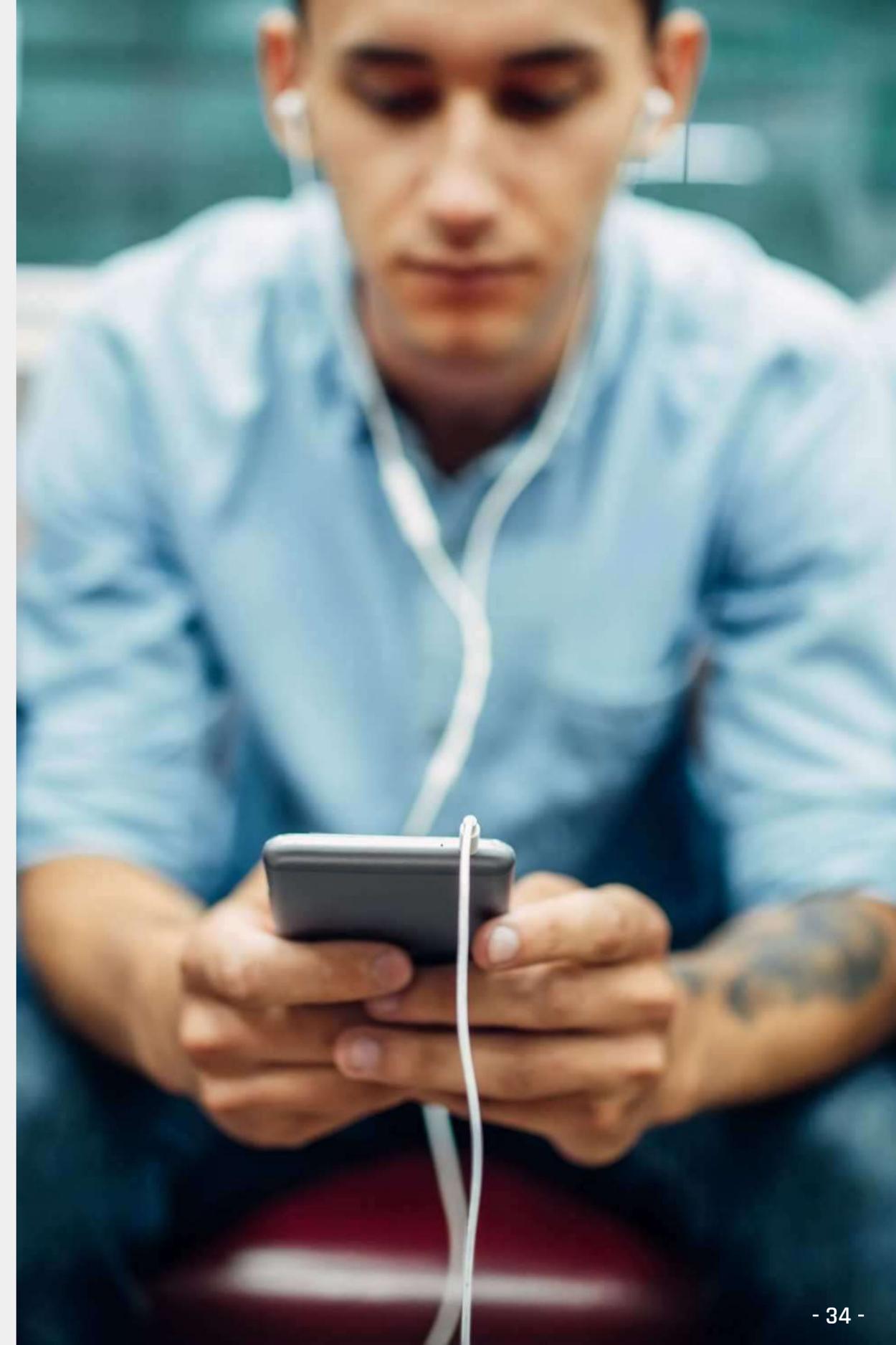
The customer is in control

In a survey conducted by Forrester, consumers were asked "**what would motivate you to share personal information.**" The top response was "**nothing would motivate me to share more personal information.**" But, a deeper look into the results found incentives such as cash rewards, loyalty programs, free product samples and better customer service, were other top contenders. Plus, a full **20% of respondents reported they'd be willing to share more, so long as you gave them control to opt-out at any time.** There will always be a segment of consumers that strive to keep their data private, but in today's hyper-personalized digital world, a growing segment of consumers are more than comfortable with sharing. So long as there is value in the exchange.

Most consumers appreciate personalization when benefits/incentives are tailored to them.
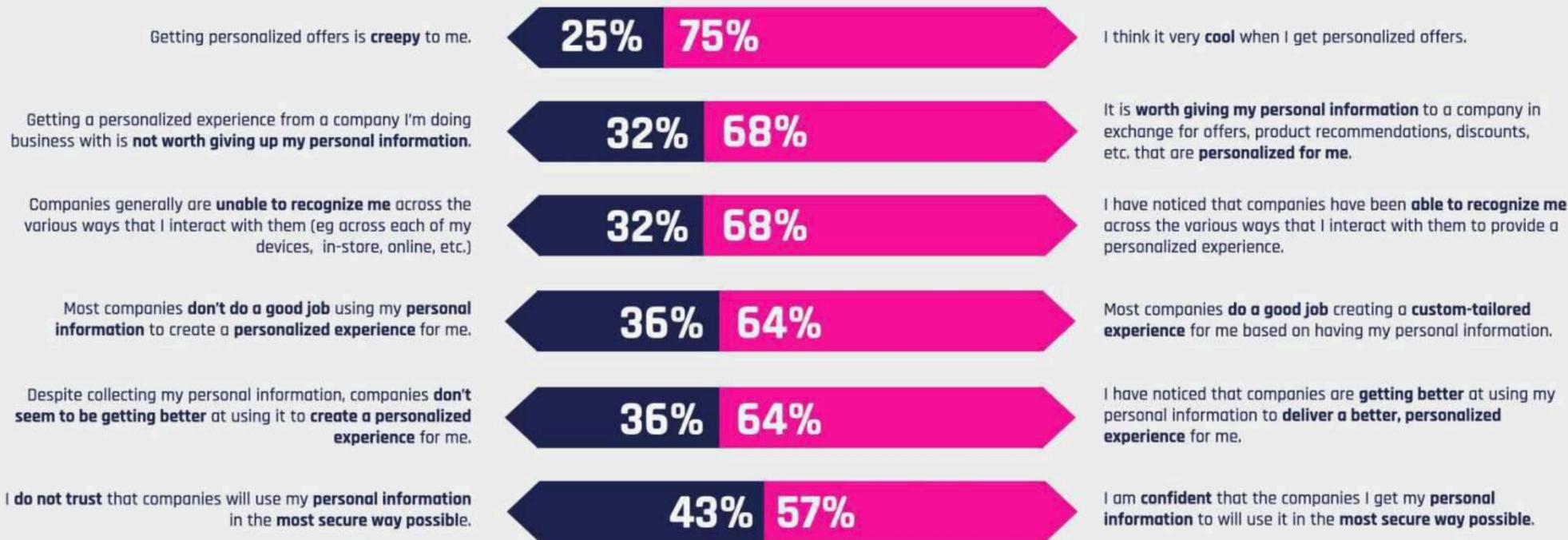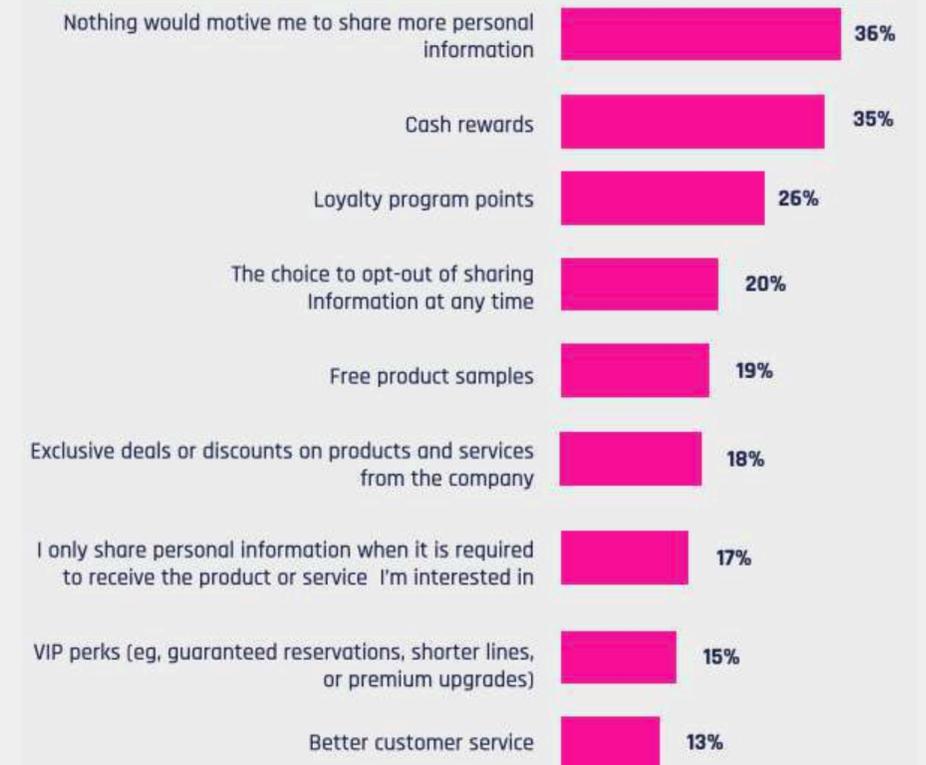
% agree more with the negative statement vs. % agree more with positive statement

Getting personalized offers is **creepy** to me.	**25%**	**75%**	I think it very **cool** when I get personalized offers.
Getting a personalized experience from a company I'm doing business with is **not worth giving up my personal information.**	**32%**	**68%**	It is **worth giving my personal information** to a company in exchange for offers, product recommendations, discounts, etc. that are **personalized for me.**
Companies generally are **unable to recognize me** across the various ways that I interact with them (eg across each of my devices, in-store, online, etc.)	**32%**	**68%**	I have noticed that companies have been **able to recognize me** across the various ways that I interact with them to provide a personalized experience.
Most companies **don't do a good job** using my **personal information** to create a **personalized experience** for me.	**36%**	**64%**	Most companies **do a good job** creating a **custom-tailored experience** for me based on having my personal information.
Despite collecting my personal information, companies **don't seem to be getting better** at using it to **create a personalized experience** for me.	**36%**	**64%**	I have noticed that companies are **getting better** at using my personal information to **deliver a better, personalized experience** for me.
I **do not trust** that companies will use my **personal information** in the **most secure way possible.**	**43%**	**57%**	I am **confident** that the companies I get my **personal information** to will use it in the **most secure way possible.**

Base: Total (n=1,000)
Q24. Please read the two statements below and select the response that you agree with more.

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"Which of the following would motivate you to share more information with companies?"

Nothing would motive me to share more personal information	36%
Cash rewards	35%
Loyalty program points	26%
The choice to opt-out of sharing information at any time	20%
Free product samples	19%
Exclusive deals or discounts on products and services from the company	18%
I only share personal information when it is required to receive the product or service I'm interested in	17%
VIP perks (eg, guaranteed reservations, shorter lines, or premium upgrades)	15%
Better customer service	13%

Note: Not all response categories are shown.
Base: 58,166 US online adults (18+)
Source: Forrester Analytics Consumer Technologies (c) Benchmark Survey, Part 2, 20202

FORRESTER

Physical locations are falling short—particularly entertainment companies and automotive dealers.

Likelihood to do business with companies offering personalized experiences:
(Much/somewhat more likely)

97%	94%	91%	78%	77%	75%	59%
Media & Entertainment	Travel & Leisure	Restaurant & Food Ordering Service	Department Store & Big Box	Financial Institution	Grocery & Drug Store	Automotive

How well companies' physical locations are delivering personalized experiences:
(Very/somewhat well)

55%	59%	63%	68%	61%	69%	51%
Media & Entertainment	Travel & Leisure	Restaurant & Food Ordering Service	Department Store & Big Box	Financial Institution	Grocery & Drug Store	Automotive

Base: Total (n=1,000)

Q10. How well do you believe that the following types of businesses currently do when it comes to offering personalized experiences?

Q18. How would the company offering you some or all these personalization options impact your likelihood to do business with that specific CATEGORY?

EPSILON

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How to collect first-party data

Data is king and the lifeblood of modern marketing strategies. Knowing the differences between the types of data and the benefits of first-party data over second- or third-party data is also important. But if the top tier of consumer data is what we all are striving for—what's the best way to get it? Let's review the best sources of first-party data and how to collect it:

Website: Your website is a powerful tool for collecting first-party data. Tracking pixels are a great example. A tracking pixel is an HTML code snippet which is loaded when a user visits a website, landing page, or opens an email. This also works for online SaaS (Software as a Service) companies.

CRM and POS: Customer relationship management (CRM) information collected from online points of sale (POS), such mailing and home addresses, phone numbers, and more importantly, an email address.

Email: Rumors that 'Email marketing is dead' have been circulated for years now. Despite what the doomsayers claim, **email continues to be the #1 driver of content engagement**. And that engagement data is first-party data you can use to nurture customers based on their behaviors.

Social Media: It's not an overstatement to say that the world of social media advertising changed with Apple's iOS 14.5 update. Over the last 18 months the prognosis hasn't gotten much better. **94% of US iOS users have chosen to opt out of third party data tracking**.

Trade Shows: Scanning the badge of event attendees that visit your booth is another powerful way to capture first-party data. Depending upon the data collection tools, you can also capture valuable information like their business cards and more.

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How to maximize your data

Possessing zero- and first-party data opens up so many options for interacting with customers. In combination with other sources of data, this offers marketers the holy grail for creating exceptional customer experiences.

Personalization: Armed with first-party demographics like age, interests, and shopping behavior can be used to great advantage. Crafting personalized experiences and tailored offerings is a powerful way to increase sales and customer loyalty.

Customer Journey Mapping: By gathering and analyzing first-party data, you can study the path their customers take from discovery through to purchasing to advocating. These insights allow you to better determine which aspects of the journey that need shoring up.

Improved Targeting: With first-party data, you can remove the guesswork when it comes to targeting. Unlike social media where you are limited to audience and platform targeting algorithms, first-party data means you have the most accurate customer information available, you can precisely hone in your strategy.

Attribution: One of the greatest challenges marketers face is identifying where a lead originally came from. First-party data sheds light to what elements of your campaign are working, allowing you to analyze attribution more accurately. Better insights allows marketers to understand where to shift budgets for direct impact on online interactions and sales.
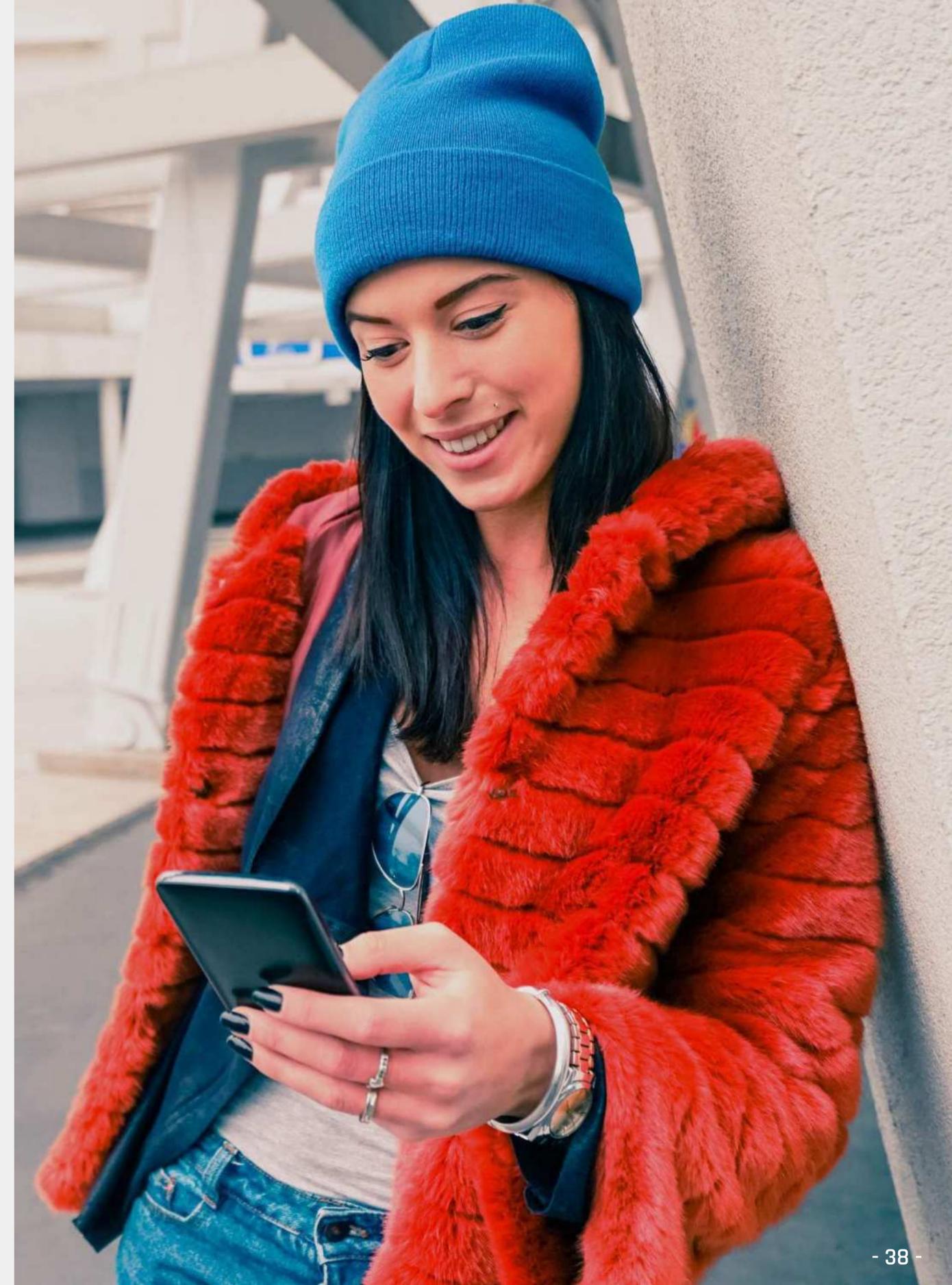
How to avoid common first-party pitfalls

Capturing first-party data is one thing. Knowing how to leverage it can feel somewhat more challenging. Here are just a few of the common frustrations related to first-party data implementation:

Lack of a Data Strategy: Having all the first-party in the world doesn't mean squat unless you have a plan on how to leverage it. The most common practice is to formulate a strategy, implement it, analyze results, and make improvements.

Integrating the Data Supply Chain: It is not uncommon for brands to have first-party data that is spread across multiple platforms throughout the data supply chain. The marketing team may have access to one data set, while the front of house staff another. This presents multiple challenges, including lack of access and less visibility to your data as a whole. Encourage teams to cross-collaborate.

Leveraging Data In Real Time: Your first-party data strategy should not just focus on what to do with this data, but also when to do it. The best time to take action on your first-party data is right away, while your brand is still top of the customer's mind. Yet, it's challenging to implement real time communications.

We can not emphasize enough the importance of implementing first-party data real time communication. Our **SAVVY DATA** AI solution combined with a Klaviyo integration and personalized automated workflow emails allow you to **easily and automatically** send personalized offers to prospective website visitors.

How to build a winning first-party strategy

Now that you understand why the industry's shift away from third-party data and appreciate the importance of first-party data, it's time to formulate a winning first-party data strategy. Listed below are the steps you should consider to develop a marketing strategy that leverages this valuable data to its maximum potential.

Step 1: Identify the relevant data you want to collect: This is where you roll up your sleeves and analyze all the first-party data you are collecting already to identify gaps on what else needs to be collected. Think about what type of data will best serve your company, and also your customers. Customer POS data can be very useful when formulating offers. If you were an online pet store for example, selling cat litter to dog owners would be a great example of not being relevant to your customers.

Step 2: Develop a plan for collecting the data you lack: Marketers often turn to a content strategy to fill these gaps. Research your competition and look for inspiration. Ask yourself, what do your audiences really care about? What can you offer them that will be valuable enough for them to hand over their information?

Step 3: Time to get creative: While crafting content, remember to provide value and filter your content through the lens of your customer. Sending out questionnaires and surveys are a great way to gain insight into your customers' mindset. Video content is also a great medium, but don't get too caught up in the production value. Instead, focus on the value of what's being showcased, because as one Gen Z survey recently demonstrated, authenticity is the most important factor for what they choose to consume. [33]

Step 4: Continually monitor your data: Once you've started collecting data, have your team analyze it regularly. Look at it from 360 degrees to identify trends and patterns. Sometimes marketers find themselves not seeing the forest for all the trees.. Certain segments may be more responsive to your content than others, and regular analysis will help you find these barriers and pivot.

Time to know your customers

According to Shopify, online businesses **convert only 2.0% of the time**. So have you ever wondered **who the other 98% of visitors are?** Data marketers have struggled in today's cookie-less world—until now. In today's cookie-less world, data marketers have struggled until now.

SAVVY DATA AI offers eCommerce businesses the unique ability to identify those first time visitors with an unprecedented level of consumer data.

Discover the selling to the middle of your sales funnel: With hard work and a plan, anybody can drive online visitors to a website. It could be through earned channels such as social media, organic SEO, or word of mouth. It could be via paid channels such as programmatic advertising, email marketing, paid search and paid social. Regardless of the channel, the facts don't lie when it comes to conversion rates. You are either converting or you're not.

Online identification and activation is essential: Thanks to GA4 (Google Analytics 4), Google can tell you how many new, unique, and repeat visitors have visited your website. If SEO is set-up properly, Google can also inform on influenced sales. But unless a consumer fills out a form, enters their personal data into a shopping cart, or actually purchases a product, there is no way of knowing who they are.

Knowing your customers: There are many reasons why it is critical that companies get to know their customers. The most important part of a sustained and successful strategy is knowing your customers. It is no longer enough for an online retailer to offer the best products or prices. Marketers need to put themselves in your customers shoes to take a hard look at the various customer touch points which. Only then can they leverage the powers of website conversion, phone calls, SMS messages, and email marketing.

Using data is a great first start: Your customer relationship management (CRM) system holds valuable information about your customers. Are your retailer associates capturing real customer data when they are entering sales into your point of sale? In our experience, not always. As we worked with a retailer with aCRM loyalty program we discovered over 25% of their CRM/POS data was inaccurate. The famous quote, "garbage in equals garbage out," comes to mind.
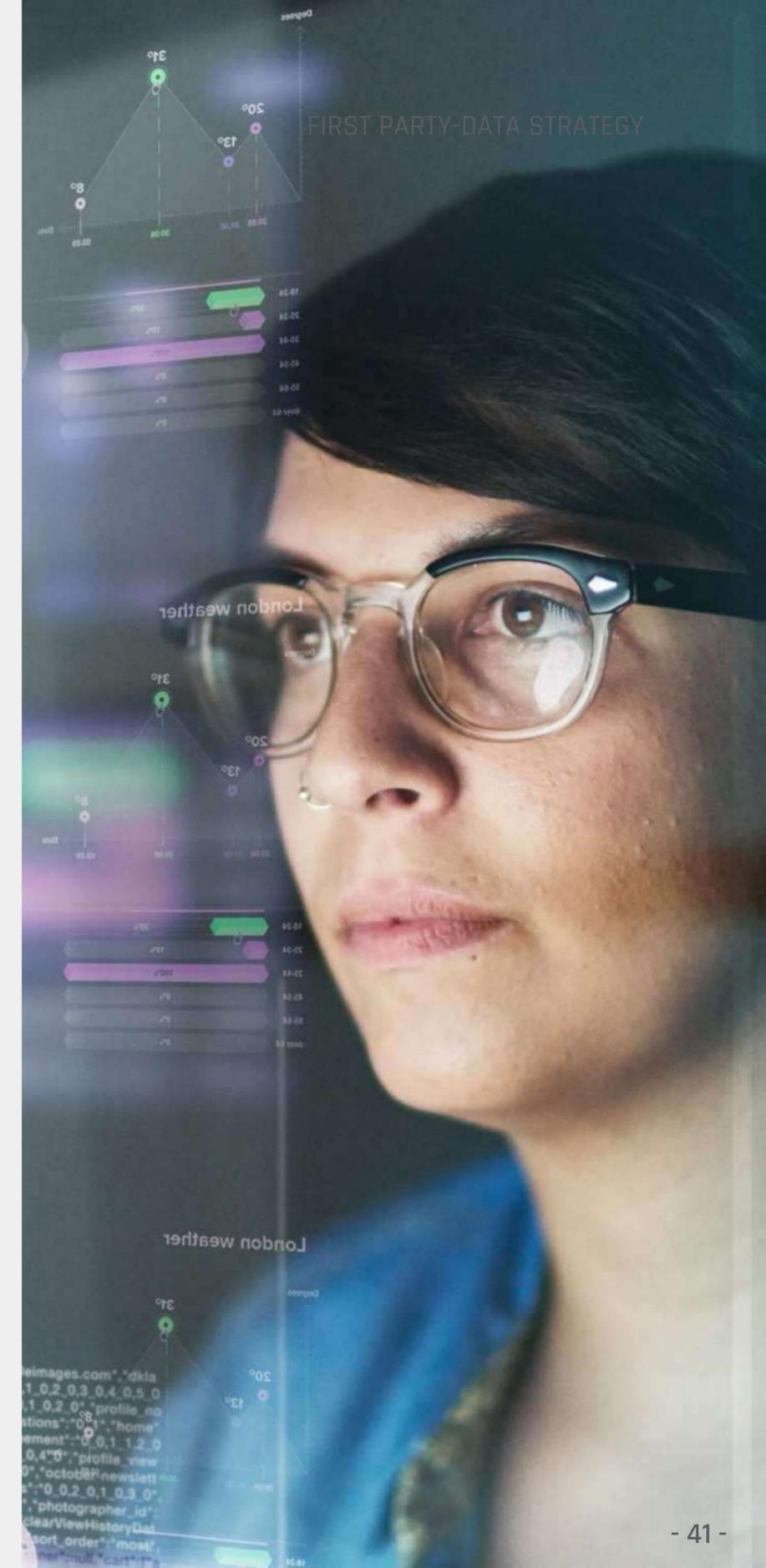
In conclusion

The days of delivering marketing ROI based on third-party data are quickly coming to an end. Brands can no longer rely on third-party as part of their long term strategy. The three driving factors behind the shift to first-party strategies are centered around web browser changes, data privacy laws and consumer demand for personalization.

As marketers or a brand, you and brands will not find an apples-to-apples replacement for third-party cookie tracking. Instead, you must embrace the changes and adjust your strategies accordingly.

Leveraging first-party data is now critical. Are you ready to start collecting and putting it to work?

Interested in learn more?
We understand the challenges that brands are facing in our new cookie-less world. Let us demonstrate the real power of unlocking your first-party data by utilizing **SAVVY DATA** AI's online visitor identification technology. If you are interested in driving more sales and giving your businesses a real competitive advantage, drop us a line and let's chat.

Contact:

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	SAVVY DATA AI**, LLC.**
	Los Angeles	Charlotte

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