

A close-up photograph of a hand with the index finger pointing towards the left, resting on a white surface that reflects the finger. The background is a blurred cityscape.

# WINNING AS A DIGITAL BRAND

*Six key strategies to ensure your brand delivers  
across the consumer journey.*

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# INTRODUCTION

As well as radically changing the way we discover, research, purchase and communicate about products and brands, digital technology is presenting consumer brands with a new opportunity to engage directly with customers.

Leading brands and consumer goods organisations recognise that they must transform their businesses to harness the potential that digital technology creates, and focus on ways to engage, support and delight consumers.

This white paper explores six key areas that need to be addressed by brands in order to get close to the end consumer, develop strong direct relationships and, ultimately, drive sales.



# EXECUTIVE SUMMARY

Unprecedented consumer connectivity and choice, driven by the growth of ecommerce and proliferation of connected devices, has driven a paradigm shift in attitudes, expectations and behaviour in retail.

85% of the UK population uses the internet daily and the average consumer uses 3.1 connected devices<sup>(1)</sup>.

Now, more than ever before, the consumer is king, expecting brands and retailers to deliver not only what they want, when and how they want it, but also to deliver inspirational and educational experiences along the way. Digital is no longer the new retail; it is the new norm.

Leading retailers have been responding to these increasing demands for over a decade, looking to capitalise on the digital opportunity and react to increased competition by developing leading ecommerce websites and omni-channel propositions.



Leading brands have also reacted; investing initially in strengthening relationships with ecommerce partners and developing robust digital marketing programmes. They recognise, in order to compete and win as a brand today, it is no longer just about gaining visibility on store shelves.

Of course, digital should not just be considered as a sales channel, with 50%+ retail sales in many sectors being ‘digitally influenced’<sup>(2)</sup>, and expected to increase further in the coming years, the scope of influence of digital continues to expand at a relentless pace. Digital growth is having a real, measurable impact on consumer behaviour; a recent US survey found<sup>(3)</sup>:

1. Consumers convert at a 40% higher rate when they use a digital device during their journey
2. Shoppers have higher loyalty after finding information on social channels
3. 22% of consumers spend more than they would have done without using a digital device

Recently, we have seen a mass awakening of brands to the potential value that digital channels can provide. Delivering a compelling and consumer-centric brand experience across all touchpoints is both critical and complex, and subsequently it is rising to the top of executive agendas as it becomes clear that the winners will gain the spoils of consumer engagement, loyalty and, ultimately, higher sales.

Despite this, however, a 2015 survey<sup>(4)</sup> concluded that over 50% of FTSE 100 companies are still ‘digitally immature’. Recent rapid investment in mobile, social media, communities, content creation and digital talent has, in many cases, been disconnected from real consumer requirements, with some commentators suggesting it is ‘technology for technology’s sake’.

**Leading brands and consumer goods organisations recognise they must transform their business to harness the potential that digital creates and focus on ways to engage, support and delight consumers. For brands to win in this new, digital environment, they must address six key areas, each of which is explored in the pages to follow.**



Leading brands recognise they must transform their business to harness the potential of digital, and focus on ways to engage, support and delight consumers.

# UNDERSTAND THE KEY CONSUMER JOURNEYS

# 1

Journey mapping is not a new activity but, due to increasing omni-channel complexity, it is becoming ever more important to gain a deep understanding of the consumer and to use this to drive and prioritise activity.

For brands, it is vital to start by defining all consumer missions across the purchase pathway. For each mission, brands must then understand how and when different consumers interact with the brand, across which touchpoints (both owned and partner channels), and their needs at each stage of the journey.

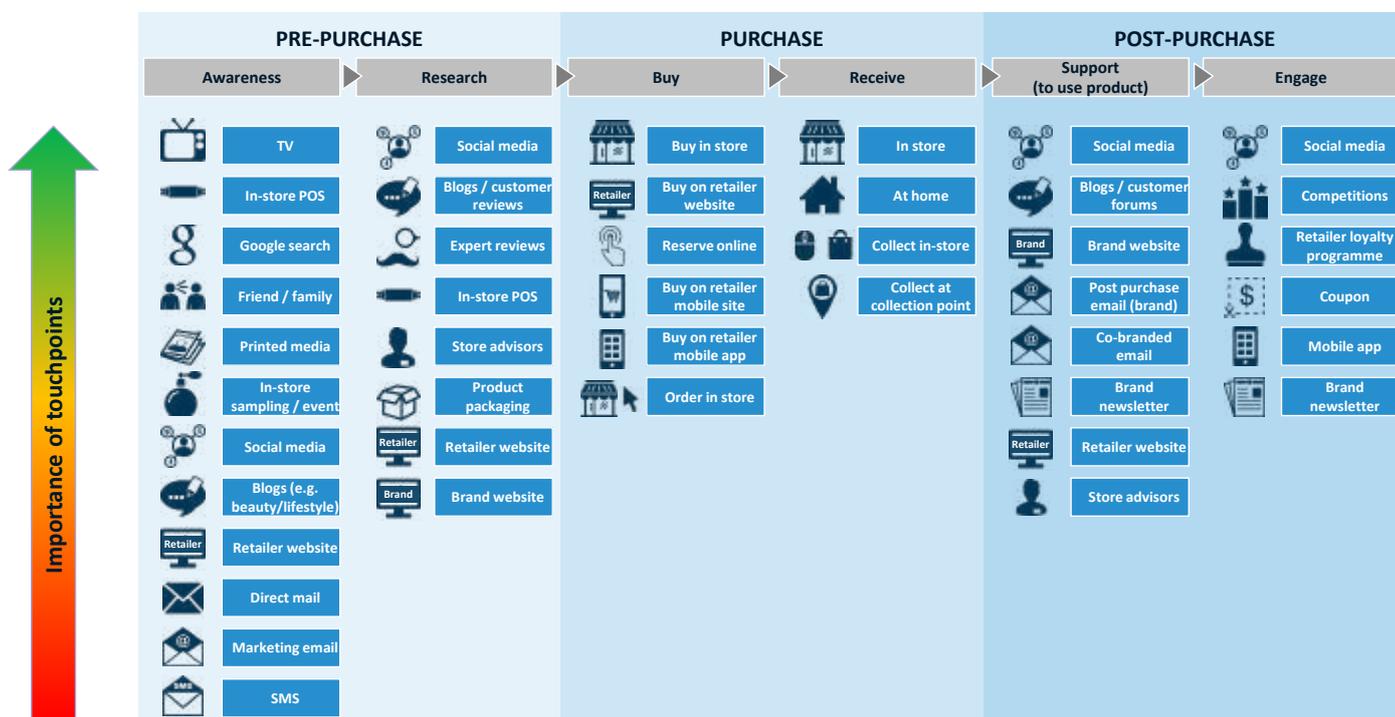
How consumers interact with the brand can vary by consumer and mission type (e.g. a distressed purchase vs. a considered purchase). Effective journey mapping begins with identifying all potential interfaces for the different journey stages (see diagram overleaf for an example). From this, information can be gathered and analysed to understand the prevalence and importance of each channel for different consumer types and missions, and to identify consumer motivations, expectations and sentiment at each stage.



Analysis must identify the most important touchpoints and the effectiveness of the brand in both meeting the consumer expectations at each stage and in supporting consumers to complete their missions. It is only from this deep insight that brands can optimise end-to-end journeys. By developing this understanding brands can:

Analysis must identify the most important touchpoints and the effectiveness of the brand in both meeting expectations and supporting consumers to complete their missions.

- 1. Recognise the full range of mission and journey types and develop the right proposition for each type.** Are routine journeys identified and made more efficient? Are inspiration journeys differentiated with an immersive and exciting experience?
- 2. Understand the prevalence of different journeys and focus on optimising the most critical ones vs. competitors.** Do we know what competitors offer? Are we aware of how key players in other industries are innovating?
- 3. Prioritise the focus of internal effort and investment.** Have we identified the changes that will have the most significant impact? Are we aligning investment to high priority areas?



Example touchpoints at each stage of the shopper journey: Beauty sector

Journey mapping is an increasingly difficult exercise as shoppers are exposed to a growing number of influences and interfaces. Already the pre-purchase research phase within FMCG can incorporate sources as diverse as brand websites, retailer websites, social networks, online videos, price comparison sites and email marketing<sup>(1)</sup> and McKinsey estimates the number of digital touchpoints is increasing by 20% annually<sup>(5)</sup>. This is driving 88% of marketers and ecommerce professionals in a recent Econsultancy survey to believe that, in terms of understanding the consumer journey, at best they are 'missing important pieces of the jigsaw'<sup>(6)</sup>.

Data is at the heart of understanding the consumer journey; both quantitative and qualitative data should be collected and shared.

Data is at the heart of understanding the consumer journey. Both quantitative (e.g. sales data, web analytics, store aisle penetration, clickstream data) and qualitative data (e.g. shopper research) should be collected and shared. Consumer goods companies already collect a lot of useful data, but this data is rarely brought together; too many organisations generate reports in siloes that will never give the insight required to impact upon the consumer's end-to-end experience.

As well as better utilising the data that already exists, there will be significant benefits in some cases from conducting new primary consumer research to gain an independent, qualitative view of different journeys. Data should be analysed to drive actionable insight about the strengths and weaknesses of the existing proposition, to prioritise improvement activity and to measure the impact of future investment. Once consolidated, the same data can often prove useful to wider segments of the company, e.g. for brand strategy or innovation.



# ENGAGE IN THE RIGHT CHANNELS AND TOUCHPOINTS

# 2

The way consumers interact with brands has changed and brand communications must transform to reflect this.

Effective marketing is no longer simply about broadcasting messages, but about two way engagement – a conversation, in which the brand talks, listens and responds – building relationships with shoppers and organically transforming them into authentic brand advocates.

Selecting the right channels to start the conversation with the right consumers is key. Traditional marketing channels such as TV commercials and print ads are much more difficult forums for inspiring conversation than newer, digital channels. Messages in the traditional channels are typically planned over long horizons and cater for wider audiences.

Digital channels, on the other hand, enable brands to employ more granular consumer targeting and can be adapted and distributed rapidly. For example, Diageo's Pimm's brand ran a 'Pimm's o'clock' summer Facebook campaign for an age targeted female consumer group that was 'thermally activated' – only being displayed on newsfeeds during warm weather. The use of big data to drive programmatic marketing (tailoring messages to a particular individual, at a particular moment, in a specific context) is booming with *Marketing Magazine* estimating that 75% of marketers are planning on boosting their programmatic spend in the next 6-12 months<sup>(7)</sup>.



*Pimm's ran a summer Facebook campaign that was 'thermally activated' and specifically targeted females during the Queen's Jubilee in 2012*

This is not an area where a single strategy will deliver in the long term. Such is the rate of change and dynamism of the digital marketing landscape that the strongest brands will employ an 'always on' approach, reacting to and capitalising on change on a continuous basis. For example, the well-publicised change to Facebook's promotional post algorithm in 2014 (an organic post will now be seen by as few as 1% of fans) significantly shifted the focus of brand building investment within the channel; only the most agile brands were able to respond quickly to this change.

Currently, brands are playing catch up to consumer behaviour, with marketing spend lagging significantly behind consumer media habits. For example, in the US, the time spent per day on mobile devices in 2015 (vs. other select media) is 24%, yet the share of ad spending on mobile is just 16%, a gap that has narrowed 5ppt in the last 3 years<sup>(8)</sup>. Brands must therefore continue to shift their focus, bridging this gap between consumer behaviour and media focus, and they must learn to adapt faster to changing trends, particularly with the proliferation of different devices and wearable technology.

To develop channel strategies, brands must understand where their target consumers are currently spending their time, which platforms they trust and what content is appropriate.



To develop channel strategies, brands must understand where their target consumers are currently spending their time, which platforms they trust and what content is appropriate. 72% of UK consumers now use social media<sup>(1)</sup>, but the relevance of and skillset required to win on each platform differs. Instagram can be highly effective for distinct consumer groups, products and communication types, yet counterproductive for others. Within the food category, for example, a McDonald's Instagram paid ad-campaign launching a new burger generated a backlash, whilst ads for Mondelez's Philadelphia cheese are reported to have driven significant sales uplifts (up to 45% increase in y-o-y sales<sup>(9)</sup>).

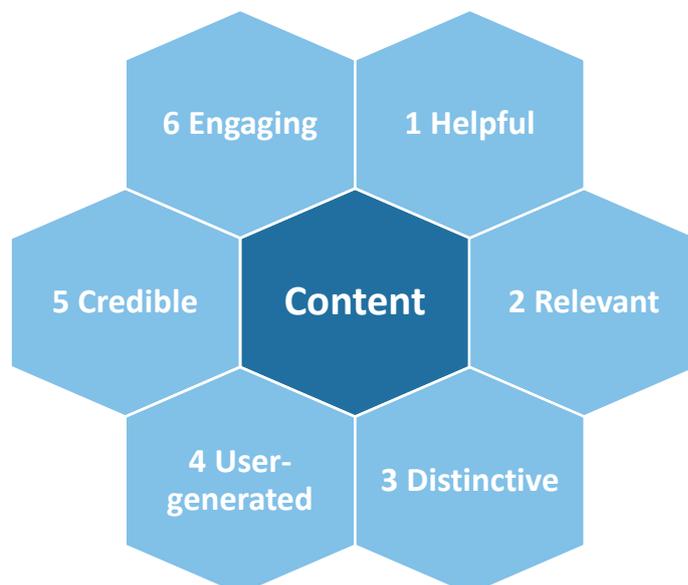
# BECOME MASTERS OF CONTENT

Content is a key tool to excite and inspire consumers and has become an industry in itself; almost 2.5m pieces of content are shared each minute via Facebook alone<sup>(10)</sup>.

Content can take many forms (text, images, videos, blogs, events etc.) but only content that is both consumed and absorbed can impact upon behaviour.

Whatever the touchpoint, the bandwidth of a consumer’s attention is limited - 55% of website visitors spend fewer than 15 seconds reading content on a page<sup>(11)</sup> – they simply cannot take in all that they see. There is a plethora of content currently being produced by brands and retailers that is neither helpful nor highly relevant to consumers, and the reality is that content is only successful if it is a useful and engaging part of the journey, developed through an understanding of consumers’ needs. Content from leading brands shares the attributes shown in the diagram.

Brands have the opportunity to differentiate themselves from retailers and marketplaces through the quality and relevance of the content they produce. This investment can be further leveraged by sharing it with retail partners for use in their stores and websites.



## 1 Helpful

Content development must start with identifying consumer missions and the content needed to fulfil those missions. Enhanced product content and buying guides, for example, can help the consumer understand more about the product and how to use it; 50% of consumers say that product videos and ‘how to’ content makes them feel more confident in their purchase decisions<sup>(12)</sup>. Typically this leads to elevated average order values and is particularly important for higher value items, such as electricals, or where the shopper needs to understand technical specifications and check the product is right for them, such as DIY products.

Enhanced product content and buying guides, for example, can help the consumer understand more about the product and how to use it.

A good example of this is Panasonic’s website, which supports a broad range of consumer missions and effectively communicates detailed features and specifications in an easy-to-digest format.



Panasonic’s website facilitates broad range of consumer missions across the purchase pathway

## 2 Relevant

Content development must be continuous, dynamic and personal; marketing calendars will need flexibility for organic, conversational posts that build on relevant topics from consumer groups. For example, Carlsberg published a digital ad-response (on TfL digital billboards) to the controversial #BeachBodyReady campaign within days of the debate commencing and garnered strong support from consumers via Twitter (despite the negative connotations of the original Protein World image).

Brand content should have a distinctive voice that is recognisable, differentiated, and speaks to target consumers.



Carlsberg's digital ad-response to the #BeachBodyReady campaign successfully engaged consumers

## 3 Distinctive

Brand content should have a distinctive voice that is truthful to the brand's USPs, is recognisably differentiated from competitors' voices, and speaks to the unique preferences of target consumers. An example of this is Marmite's continued use of its 'Love it. Hate it. Just don't forget it.' style with campaigns such as #MarmiteNeglect, which generated both large numbers of viewer complaints and a 14% value sales improvement<sup>(13)</sup>.



Marmite's #MarmiteNeglect campaign was highly distinctive and generated a 14% sales uplift

## 4 User generated

Brands that invite consumers into the content creation process often reap the rewards driven by higher transparency and consumer trust. According to PeopleClaim, 82% of consumers consider user generated reviews as highly valuable or valuable<sup>(14)</sup>. These reviews enable consumers to share their experiences and support potential purchasers in their decision making process, whether accessed as part of an online journey or via mobile whilst in-store.

Leading brands are also starting to utilise the wealth of user generated content on social sites to support consumers in other touchpoints. Tagging systems can be used to match product mentions in social posts to specific SKUs, enabling brands and retailers to surface product-specific content in the most appropriate places on their websites. A recent A/B test by Bazaarvoice demonstrated a 25-40% engagement increase on a product page with social content and a 3-6% conversion uplift<sup>(15)</sup>. User generated content also supports higher website quality scores in the Google algorithm, driving up SEO rankings.

Doritos has reached out to consumers to produce their 30-second Super Bowl advertisement for the last seven years, under the campaign title 'Crash the Super Bowl', attracting over 5,000 entries and reaching over 100m views on Facebook across the five finalists in 2015.

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*Doritos user generated campaigns have been hugely successful, attracting over 5,000 entrants and 100m Facebook views in 2015*

## 5 Credible

Leading content developers partner with influencers (such as bloggers and vloggers), driving benefits such as access to their cult following and a halo effect from their expertise. Beauty vlogger, Michelle Phan, for example, has 7.6 million subscribers to her YouTube channel, with 350 videos of makeup tutorials. Brands can share products with these influential social personalities and encourage them to review their products or even enter into partnership. In 2010 Lancôme made Phan their official video make-up artist after she featured their products in her videos.



Lancôme made Michelle Phan their official video make-up artist in 2010, after the beauty vlogger had amassed over 7.6m YouTube subscribers

## 6 Engaging

Brand content, whilst it must have elements of the factors above, will never succeed if it fails to engage the consumer; it must have a hook. The hook is invariably the element of fun or humour but can also include intrigue, inspiration and nostalgia to name but a few.

For example, Evian’s ‘baby & me’ advertisement featuring CGI-aided babies performing outlandish stunts achieved 50m YouTube hits and 100m total views within weeks. Brands that can successfully engage consumers can have a more meaningful and longer conversation with them.

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Evian’s ‘baby & me’ campaign engaged consumers attracting over 50 million YouTube hits

# DELIVER CONSISTENTLY ACROSS MULTIPLE CHANNELS

# 4

Creating relationships with consumers is about more than the moment of truth at the till or online checkout; the entire journey must be considered, from pre- to post-purchase, to drive loyalty and brand advocacy.

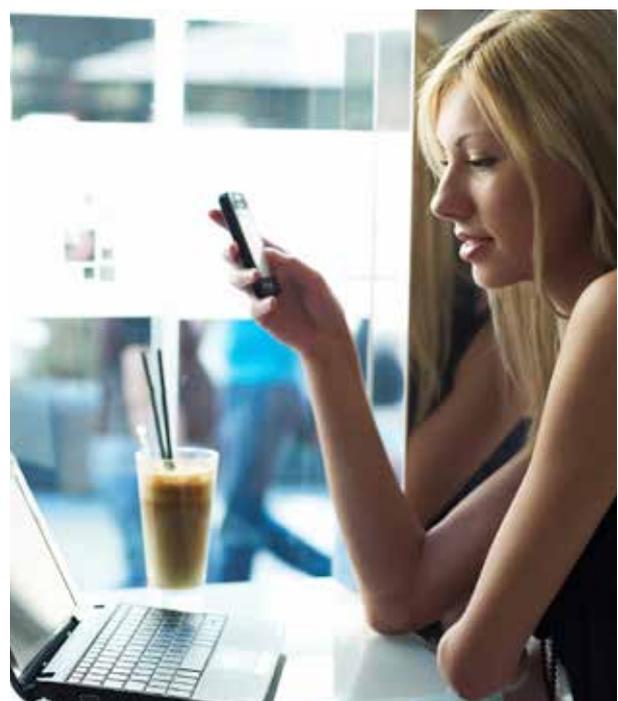
To achieve this, the brand experience must be consistent and connected, enabling the consumer to move easily along the journey.

Within the retail sector, an IBM study found that 81% of consumers think it is important that a retailer delivers a consistent experience across all points of interaction<sup>(16)</sup>. This has important implications for brands and how they interact with their retail partners.

Brand narrative should be coherent and distinctive across all touchpoints (e.g. social channels and brand website) and quality product information such as imagery, specifications and usage instructions should be equally available on retailer and brand websites, and reflected in in-store POS materials.

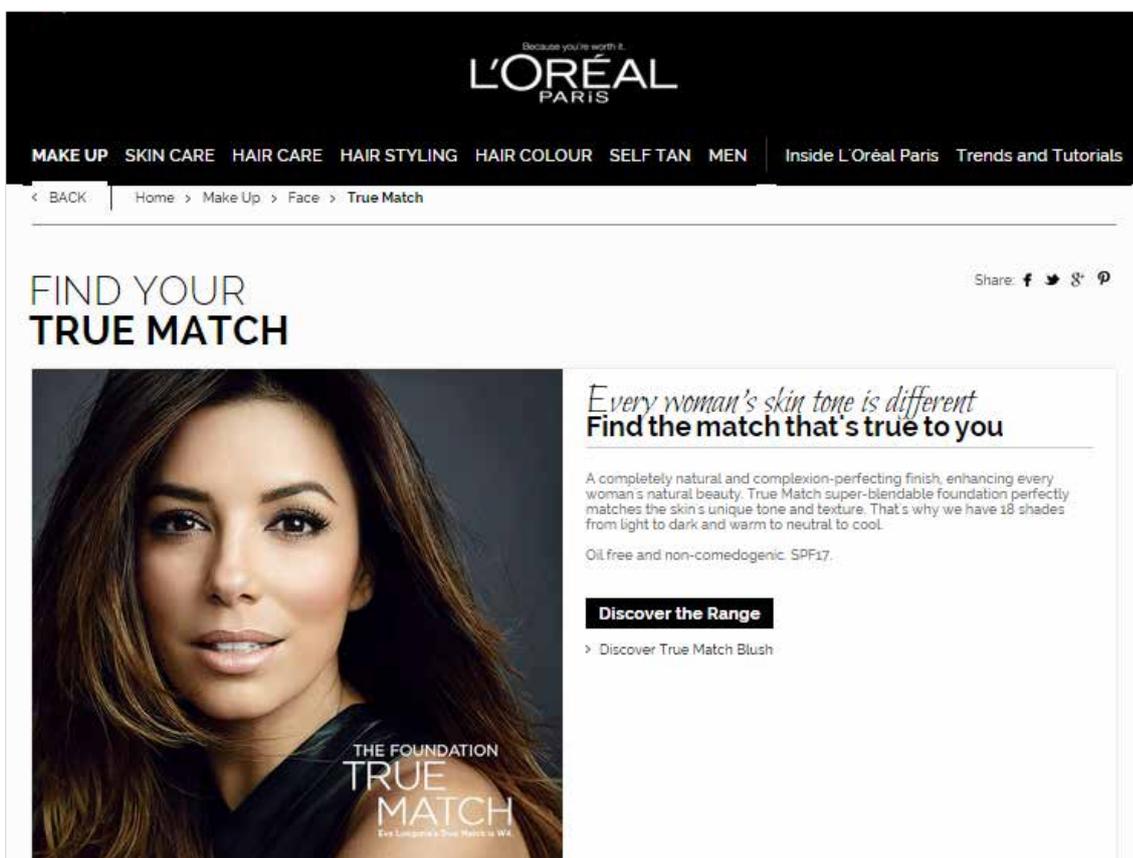
Leading brands share the collateral they develop for their owned channels with retail partners, ensuring their products are supported with the best product information in every channel. It is also important to regularly audit the proposition on whether the shared content is being used.

With Shopper Sciences now estimating that, on average, people use 10.4 sources of information on their journey to purchase<sup>(17)</sup>, brands must ensure that the consumer is supported to move seamlessly and consistently through journey stages.



To support pre-purchase research, all touchpoints should promote the brand website URL (with a clear call to action) and social links to ensure consumers can easily navigate to their desired information. For brands that do not have a transactional proposition shoppers should be supported to move easily to another channel for purchase e.g. via a buy-it-now button or stores list. At all stages, the brand must communicate with ‘one voice’ to the consumer through the tone of voice and creative consistency. L’Oréal does this well with their True Match campaign across TV commercials, ‘MatchMaker’ mobile app and ‘Find your true match’ website.

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L’Oréal’s True Match campaign is ‘one voice’ across all channels (website (top), TV ad (left), magazine ad (right))

# RE-ORGANISE AND CREATE PARTNERSHIPS

# 5

With so many touchpoints, a consistent and seamless consumer journey will only be delivered when organisations are configured to work holistically across internal teams.

By recognising mutual benefits from joint activity and focusing on the end consumer, long standing conflicts between sales/customer managers and the direct sales side of the business can be overcome.

With digital as the new norm, it must become a core capability that is integrated with other key functions, both within sales and marketing and more widely. Digital leads must work internally to upskill the whole organisation. This will only become real when sponsorship for digital initiatives starts at the executive level.

Digital has led to a blurring of the historic clear delineation of relationships between brands and retailers: brands are launching online direct to consumer propositions to understand consumers better and drive incremental sales, whilst retailers are curating their own product ranges to better control their supply chain and improve gross margin. To manage this new relationship, and ensure that there isn't increased competition, duplication of effort or consumer confusion, both parties must shift their mind-sets to that of a collaborative partnership with consumer centricity at its core.

As highlighted earlier, leading brands act as 'content hubs' sharing the high quality content developed for their own channels with retailers to ensure a consistent consumer experience and to reduce the cost of marketing for both parties. Joint marketing campaigns can drive the consumer to the right channel in their journey – to a brand touchpoint for research or to answer product related questions, or to a retail touchpoint for purchase or to answer a proposition related question.

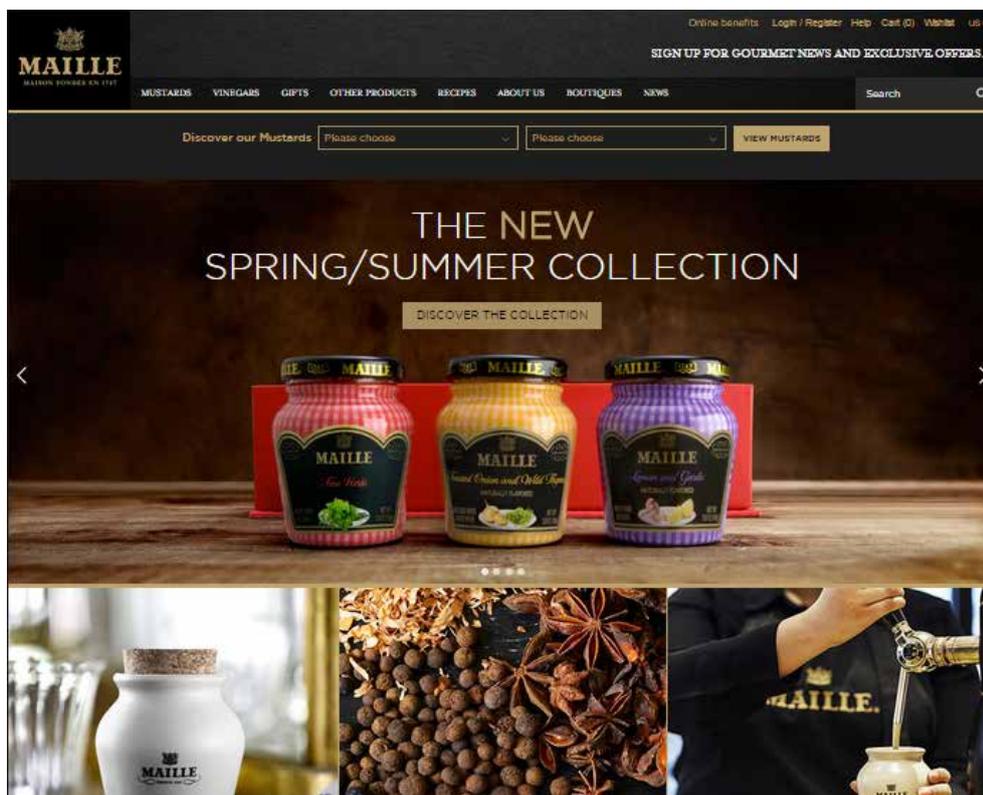


# CONSIDER GOING DIRECT TO CONSUMER (DTC)

A further, step-out consideration for a brand is whether or not to launch a direct to consumer (DTC) proposition.

This is a topic that has garnered significant attention recently with a number of consumer goods companies articulating their intent to explore options.

Initial launches by well-known brands have taken a variety of formats, from the Maille mustard branded UK site and flagship store combination to P&G’s virtual shop offering the full US range, and Diageo’s development of a new brand ‘alexanderandjames.com’ as a vehicle for its luxury liquor sales online.



Maille launched its UK site in December 2014 representing Unilever’s first push into ecommerce

Launching a direct proposition can deliver clear brand benefits – enhanced reach, ownership of the consumer relationship, control of the end-to-end consumer journey, access to consumer data, full control of the brand and retained margin – but delivering a product direct to a shopper is costly and there needs to be sufficient margin to cover the operational costs involved. DTC does not defy commercial or shopper logic; there must be a clear rationale for why a shopper would buy directly rather than as a wider basket purchase at a retailer.

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A compelling DTC proposition must be carefully considered. Assortments with the following characteristics are more likely to be suitable:

- High value products or products purchased with high frequency
- Products or offers with significant emotional engagement value
- Products or offers that are unavailable through other channels
- Products or offers where an online channel can add value e.g. through its discrete or personalised nature, community development or content distribution

Successful DTC propositions offer more to the consumer than just a purchase channel. Enhanced content can be key, especially in sectors like health and beauty, and brands often give shoppers free samples, exclusive access to new products or brand experiences. For other brands, a differentiated delivery proposition can be compelling. Brands including Bumble and bumble and Dollar Shave Club have launched subscription services, offering convenience to the shopper, whilst Reckitt Benckiser’s Durex site offers a discreet journey from purchase to delivery for products that consumers can find embarrassing to buy in-store.



Dollar Shave Club has launched a subscription service, offering a convenient and unique service to consumers

Transactional websites also enable brands to offer their full range, which may be constrained by store shelf space, and launch new products quickly, without going through negotiations with retail partners, enabling them to take a test and learn approach to proposition development.

Some retail partners may be concerned when suppliers take this route to market, initially wary that it will cannibalise their own sales. Often, however, a brand developing a DTC proposition can be beneficial for retail partners as it is typically differentiated (a key characteristic for success – see above) and can create greater brand awareness/visibility vs. competitors. The brand content that is created for the site can also be shared with retail partners for their own sites.

A thorough economic feasibility study must be undertaken to ensure that a DTC proposition will drive profit. The operational and technology overheads, along with marketing investment required to drive visibility and ongoing loyalty, can make it difficult for a low margin brand to break even, let alone turn a profit. Effort must be focused on driving efficiency in supply chain and operations e.g. re-engineering the products to be delivered through the post rather than via courier.

Splosh, for example, has developed concentrated laundry products, which shoppers mix with water at home, taking weight and therefore cost out of logistics. It is challenging, however, as retailers, especially pureplays, are constantly resetting the bar in consumer expectations about service and delivery – Amazon recently announced a same day delivery service for example – which makes it increasingly difficult to compete.

Launching a DTC venture is a fundamental transformation for most brands, essentially transforming their model into vertical retail. This is a new skillset that includes ecommerce development and trading, marketing, user experience, analytics and operations. To deliver this effectively the organisation will need to recruit and re-organise. This can be a significant culture shift and will need to start and be maintained with senior level buy-in. DTC returns typically follow a J-curve, so in order for the model to succeed, senior stakeholders need to be committed to delivery over the medium to long term.

Launching a DTC venture is a fundamental transformation for most brands, requiring a new skillset, re-organisation and a significant culture shift.



Splosh takes weight/cost from logistics with concentrated laundry products

# IS YOUR BRAND READY TO WIN AT DIGITAL?

We are living through a period of radical change in retail; digital is no longer 'new' but is now the norm. This creates opportunities for brands to develop a stronger relationship with consumers and to work more closely with retail partners to compete and win vs. competitors.

Brands must strategically transform and focus on the six areas outlined in this paper to develop a consumer centric approach to digital; ensuring that the focus of all activity is on what the consumer really wants and needs at each stage of their journey.

Through this understanding brands can develop leading propositions to drive customer loyalty and engagement, ultimately resulting in higher sales. Is your brand ready to win at digital?

- Do you have a deep understanding of what your key consumer journeys are and the quality of the current shopper experience?
- Are you engaging with consumers in the right channels and consistently across key touchpoints?
- Do you know what your consumers' motivations, expectations and sentiments are at each stage?
- Do you collect the right data at each touchpoint and combine this to derive insight about how effectively your proposition meets the consumers' expectations?
- Is your content development strategy rooted in consumer needs?
- Do you have a strong working relationship with your retail partners? Do you share content with them to use in their touchpoints?
- How suitable is your existing supply chain, systems and technology for digital – does your current infrastructure enable your brand to support a seamless digital experience for the consumer?
- Are you, internally and externally, organised to deliver a high quality, consistent consumer journey in partnership with retail customers?
- Have you assessed whether your brand is suitable for a direct to consumer proposition? Have you started to think about how you could implement this?

# ABOUT JAVELIN GROUP

Javelin Group is Europe's leading – and largest – specialist firm of retail and brand strategy consultants.

From offices in London and Paris, our 240 consultants work with large retailers and brands all over the world, to plan and implement strategies to enable them to anticipate and respond to the rapid changes in customer shopping habits, retail technologies and the competitive environment, to ensure that they thrive in the coming decade.

Javelin Group is best known for its work with retailers, but we also have a long heritage of supporting consumer brands to identify and deliver digitally-enabled change. We help consumer brands to optimise their proposition in online and offline channels, drive engagement, and ultimately higher sales through the six areas highlighted in this report. Recent clients include Bosch, Clarins, Durex, GHD, Nike, Puma, PZ Cussons, Samsung, Sony and Unilever.

## Contact us

If you would like to discuss your digital brand strategy, please contact Amy Meekings, Associate Director of the Strategy practice at Javelin Group, at [amy.meekings@javelingroup.com](mailto:amy.meekings@javelingroup.com) or on +44 (0)20 7961 3200. For more information about Javelin Group, please visit [www.javelingroup.com](http://www.javelingroup.com).



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