



HOW WILL YOU REACH THE WORLD'S MARKETABLE CONSUMERS?

Expanding Your Global Footprint

acxiom®

EXECUTIVE SUMMARY

We live in a world where globalization and internet and mobile adoption provide new opportunities to reach and engage consumers everywhere via new digital platforms.

Global brands naturally want to take advantage of this borderless digital world to deliver great customer experiences in key markets.

But acquiring and activating consumer data globally has been extremely challenging because of various complexities, such as:

- Differences in the availability and granularity of data by country.
- Divergence in the rules concerning data collection, use, and sharing on a country-by-country basis.
- Inability to resolve identities across digital and offline channels.
- Limitations in how data can be integrated into publishers or platforms.

To overcome these challenges, a brand would need to expend valuable time and effort to learn what data is available in each country, determine how that data can be used from a privacy perspective, implement processes to contract and purchase the data directly, evaluate and contract with partners to activate data across digital channels.

Brands need a centralized, multi-faceted approach to global marketing that encompasses:



ETHICAL DATA USE

Ensuring compliance with all applicable privacy laws.



IDENTITY RESOLUTION

Providing the ability to build a complete view of the consumer for improved consumer recognition and engagement.



INTEGRATIONS

Being easy to buy, activate, and connect data to leading publishers and Adtech platforms.

Only this approach can unlock seamless marketing across the global data ecosystem.

KEY TRENDS: GLOBALIZATION AND DIGITAL

What's driving demand for global marketing with consumer data?

A borderless digital world.

Digital platforms are driving marketing, advertising, and e-commerce ecosystems that are global and borderless. The internet enables connections among people and organizations around the world. Social media network Facebook has reported that most of its 1.56 billion daily active users are outside the U.S.¹ Digital commerce leader Amazon sells products to global consumers via 11 marketplaces that support more than 180 countries.² World leader Google's global digital ad revenue is expected to reach \$103.73 billion in 2019.³ These internet giants have demonstrated the ability to reach and engage consumers on a global scale via technology platforms that can transcend regional boundaries.

Digital drives global ad spend growth.

Worldwide, the digital ad spend is expected to be \$333.25 billion in 2019 (an increase of 17.6% over 2018), representing approximately 50% of the entire ad market. In China, the U.K., Norway, Ireland, Denmark, and Sweden, more than 60% of ad spend is now digital – and in the United States, the Netherlands, and Russia, over half of all ad investments go to digital.³

Mobile-first or mobile-only audiences.

Speaking of mobile, smartphones are the primary device for many consumers outside North America because of the lack of broadband internet for desktop PCs. Consequently, a smartphone with a data connection provides the most convenient way to access the internet. In APAC alone, smartphone adoption increased from 1 billion users in 2014 to an expected 2 billion this year.⁴ Globally, mobile phones accounted for 52.2% of all website traffic in 2018, up from 50.3% in 2017.⁵ This trend to go mobile can also be seen in the U.S., despite the popularity of broadband connections. Roughly one in five American adults is a “smartphone-only” internet user.⁶

Given the previous trends, it's logical brands see a great opportunity to reach consumers in a world that is increasingly borderless, digital, and mobile. So, what are the challenges of marketing to global consumers via data-driven marketing approaches?

“Brands should invest in global consumer data today before the ‘disruptors’ in your industry use data to deliver a better customer experience and disrupt your business.”

- **Andreas Cohen**,
Chairman of I-COM, a global trade organization for smart data marketing

COUNTRY SPOTLIGHT



GERMANY

TOTAL POPULATION: **82 MILLION**
ADULT POPULATION: **69 MILLION**

MARKET AND REGULATORY LANDSCAPE

- GDPR compliance in effect
- A double opt-in process is standard practice
- Consent is required for cookies that process personal data
- Not permissible to send marketing emails or SMS messages to either corporate or individual subscribers without their prior explicit consent



INDIA

TOTAL POPULATION: **1.37 BILLION**
ADULT POPULATION: **989 MILLION**

MARKET AND REGULATORY LANDSCAPE

- Data availability impacted by multiple factors including privacy laws and regulations
- Data quality varies greatly
- Match rates may be lower than in countries with more established addressing systems

KEY CHALLENGES: GLOBAL CONSUMER DATA

Marketing on a global basis presents several challenges, especially when consumer data is required to support audience segmentation, targeting, and personalization across digital and offline channels. Key challenges include:

Availability and granularity of data varies widely.

The breadth and depth of consumer data varies by country. Breadth refers to data categories such as age, education, and income, and depth refers to the number of data elements within a specific category. For example, within the income category you may have up to five income ranges available. In addition, the number and granularity of data elements may exist at the individual level, household level, or only at a geographic level for a specific country.

Rules for consumer data vary by country.

Legal requirements and cultural acceptance of the collection, use, and sharing of consumer data vary by country. For example, countries that are part of the European Union must comply with General Data Protection Regulation (GDPR) and how “personal data” is defined.

Identity resolution may not exist.

A complete and single view of the customer for consumer identity resolution may not be available to enable people-based marketing (i.e., targeting at the individual level across channels) within a specific country. An “identity graph” maps personally identifiable data (PII), such as email addresses and phone numbers, with anonymous identifiers, such as cookies and device IDs, to a single individual, providing a holistic view of the customer.

Data activation across platforms is fragmented and often limited.

To effectively reach audiences via publishers and digital platforms, a fundamental requirement is the availability of cookies or mobile IDs for anonymous digital targeting. However, these data pools may be thin or non-existent in a specific country. In addition, publishers and platforms are fragmented by nature, requiring multiple integration processes.

Despite these obstacles, marketers must find ways to overcome country-specific limitations and achieve their business goals.

COUNTRY SPOTLIGHT



JAPAN

TOTAL POPULATION: **127 MILLION**
ADULT POPULATION: **110 MILLION**

MARKET AND REGULATORY LANDSCAPE

- Act on Protection of Personal Information (APPI) in place since 2005
- Third-party recipients of data must be disclosed
- Offers an adequate level of data protection as determined by the European Union



MEXICO

TOTAL POPULATION: **129 MILLION**
ADULT POPULATION: **94 MILLION**

MARKET AND REGULATORY LANDSCAPE

- Moving toward an environment of data usage transparency and explicit consent
- Ley Federal de Protección de Datos Personales is the law concerning data collection and compilation

FROM GDPR TO CCPA

“If you are a business that relies on data at its core, you should be asking yourself today what you would be doing differently in January 2020. If you are not doing that now, it’s time to start or be prepared to face the fire.”

- **Neil Sweeney**, Founder of Killi
Data-Driven Thinking, Adexchanger (Oct 2, 2018)

The way data is being used has come under intense scrutiny, and new regulations are making data-driven marketing strategies more challenging and potentially more risky. When asked about the obstacles or challenges in the ability to deploy or derive value from data-driven marketing and media initiatives, slightly more than half of respondents cited government regulation or the threat of regulation as their No. 1 concern.⁷ To deal with those concerns, strict government regulations affecting global businesses, such as the GDPR and the California Consumer

Privacy Act (CCPA), have been enacted since 2018, and other governments and regulators are expected to follow with similar laws in the coming months within the U.S. and outside the country.

Businesses collect data about consumers to better understand customers and prospects. When companies use this data to gain insights into interests and preferences, they can cut through the clutter and make relevant offers, providing value to today’s busy consumer, who expects an elevated brand experience.





What is it?

- **GDPR:** Enacted to standardize privacy laws in the EU and protect EU citizens from privacy and data breaches. All global businesses that conduct business within the EU must comply.
- **CCPA:** Grants California consumers specific rights regarding how their data is handled. The regulation is largely viewed as one that will be emulated by other government entities moving forward.

Who is affected?

- **GDPR:** Any company processing personal data related to individuals living within the EU.
- **CCPA:** Any company with an annual gross revenue of more than \$25 million that has bought or received data to be used for commercial purposes on 50,000 California residents, or derive 50% or more of its revenue from selling data.

When does it start?

- **GDPR:** Enforcement began in May 2018.
- **CCPA:** Enforcement begins on Jan. 1, 2020.

What can it cost?

- **GDPR:** Fines of up to 4% of annual global revenue.
- **CCPA:** The cost of any actual or statutory damages resulting from a security breach involving exfiltration, theft, or disclosure due to a failure to implement and maintain reasonable security procedures and practices.

COUNTRY SPOTLIGHT



UNITED KINGDOM

TOTAL POPULATION: **66 MILLION**
ADULT POPULATION: **54 MILLION**

MARKET AND REGULATORY LANDSCAPE

- GDPR compliance in effect
- Implied consent or consent through browser settings is possible for the non-intrusive use of cookies
- Prior consent is required to send direct marketing SMS messages to individuals

DATA REGULATIONS: A SIDE-BY-SIDE COMPARISON

Applies to both “offline” and digital personal data/information.

YES **GDPR** **CCPA** YES

Must provide detailed information on how personal data/information collected is used and processed.

YES **GDPR** **CCPA** YES

Must provide consumers access to information held about them.

YES **GDPR** **CCPA** YES

Must provide a right to rectification (i.e., correction).

YES **GDPR** **CCPA** NO

Must provide individuals a right to have data about them deleted.

YES **GDPR** **CCPA** YES

Must include a “Do Not Sell My Personal Information” link on websites and privacy notices.

NO **GDPR** **CCPA** YES

Implication

What does it take to ensure compliance? For most companies, it means forming a cross-functional task force comprised of associates from engineering, product, delivery, IT, security, legal, and data ethics teams to develop methods of compliance from data collection to destruction.

OPPORTUNITIES: GLOBAL INDUSTRY USE CASES

Across industries, marketers use global consumer data to address the following use cases:

Reach global digital audiences:

Leverage audience curation and distribution capabilities to drive digital marketing around the world across global publishers and platforms.

Omnichannel customer acquisition:

Use global consumer data to identify new target audiences and reach them through people-based marketing campaigns across digital and offline channels.

Enhance customer data for deeper insights:

Match and append global consumer data to first-party customer data to drive better insights for modeling, targeting, and personalization.

What would this look like for a specific industry?
Let's review some examples:

TRAVEL & HOSPITALITY:

A global airline based in North America needs to fuel international expansion by acquiring family travelers who seek to visit U.S. destinations from cities in the U.K., Germany, Australia and China. They want to reach these travelers via search, display, and social channels.

Key consumer data needed for each country:

- Households with children
- Households with an interest in traveling

FINANCIAL SERVICES:

A global bank based in the UK needs to boost its retail banking business in Asia Pacific countries such as Singapore, Australia, and New Zealand. To reach consumers, it will need to create a secure environment for the exchange of first-, second- and third-party data and perform identity resolution to accurately identify customers and prospects.

Key consumer data needed for each country:

- Propensity toward banking and credit card products

MAKING AN IMPACT

The following are examples of companies that have grasped the vision of borderless marketing and are moving forward to make it a reality.

GLOBAL E-COMMERCE COMPANY

OPPORTUNITY

An e-commerce company wanted to reduce marketing spend through improved targeting for campaigns and support segmentation for more personalization of service offerings to increase revenue and customers' lifetime value.

SOLUTION

- Enhances data across 17 primary markets with an established set of attributes. Age and income attributes are of particular interest.
- Performs a daily enhancement process.
- Derives more value and relevance from data via analytical support and more global data education.
- Will soon expand to seven additional countries.

WEARABLE TECHNOLOGY COMPANY

OPPORTUNITY

A wearable technology company wanted to create specific digital audiences on a global basis for acquisition campaigns. Its desire was to create audiences with a wide geographical footprint based on offline — or real — attributes and characteristics that mirrored those of their current, most valuable customers.

SOLUTION

- Enables audience creation based on offline or real characteristics and associated with digital activation IDs in the agency's data management platform.
- Activates audiences (PII, Cookie, MAID), resulting in carefully targeted social media, display, and mobile campaigns.

GLOBAL CAR MANUFACTURER

OPPORTUNITY

A car manufacturer was looking to enhance its customer data on a global basis to drive segmentation and propensity modeling in its six major EMEA markets. Its primary interests were gender, age, education, household composition, and income.

SOLUTION

- Sources data through a single provider.
- Delivers the availability of consistent variables across the desired countries.
- Aligns a fixed pricing structure with budget availability in each country.

SELECTING THE RIGHT PARTNERS: KEY QUESTIONS TO ASK

To navigate the global data and privacy landscape, you need a partner with a comprehensive set of capabilities. Here's what you should ask each potential provider to inform your evaluation process:

AUDIENCE DATA, SEGMENTATION, AND TARGETING

- Which data categories or dimensions (e.g., marital status, net worth, children, occupation, lifestyle) can be used for targeting?
- Can you compare data categories (e.g., education) and corresponding elements (e.g., households' likely spend on primary/secondary school education) across countries?
- For a specific country, can you provide key market insights, such as general statistics, audience reach, notable regulatory information, data category/element coverage, and availability of data services?
- Can you define global audience segments across countries so that I can reach “apples-to-apples” segments across channels and platforms?

Uncover important information,
such as whether a country has thin or
non-existent cookie or mobile ID pools.

IDENTITY RESOLUTION

- Who certifies the accuracy of your data?
- How frequently is your data updated?
- How does your solution help accurately identify people in a country to enable effective targeting with both digital and offline media?

Identity resolution is the key
to sending the right message
to the right person.

SELECTING THE RIGHT PARTNERS: KEY QUESTIONS TO ASK

CAMPAIGN ACTIVATION

- How does your solution help me execute my advertising campaigns across digital platforms and publishers (e.g., display, search, social, mobile)?
- What are the ways offline data can be activated online in each country?
- Do you have a plan and resources to provide measurement reporting across channels and campaigns?
- How does your solution help me execute my advertising campaigns across offline channels and publishers (e.g., TV, direct mail)?

Digital campaign activation for mobile takes on greater importance in countries where the personal computer never achieved broad adoption.

CONSUMER PRIVACY AND COMPLIANCE

- How does your solution ethically obtain consumer data?
- Does your data collection and use practices comply with legal and privacy requirements for each country of interest?
- Does your company have a Privacy Shield certification?

Ensure compliance with data protection requirements for transatlantic personal data transfers.

GETTING STARTED

There's a world of opportunity to deliver consumers a true borderless experience. Here's how to get started:

- 1 Identify the data attributes you need to support your marketing objectives and how you will leverage this data (i.e., digital/offline targeting, enhancement, analytics, customer acquisition).
- 2 Map out which countries are your top priorities.
- 3 Ask the key questions to find a partner that can help you accurately identify and understand consumers, activate data, and target audiences globally.

References

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A world of opportunity awaits.

WORK WITH ACXIOM

With coverage in more than 60 countries and growing, as well as the ability to reach more than 2.5 billion addressable consumers, Acxiom has the best, most inclusive data offerings in the world — privacy-compliant and already integrated into leading publishers and Adtech platforms. Our global data subject matter experts and proprietary tools will help you navigate the global data and privacy landscape.

From established European and Asian markets to emerging powerhouse markets like India and Mexico, Acxiom has the data expertise and resources to help you expand your marketing horizons. Our Global Data Navigator (GDN) tool demonstrates Acxiom's vast consumer data assets and where that data is available geographically. This tool lets you quickly locate data elements, service availability and the digital footprint across the globe to fuel informed decisions.

All roads lead to Acxiom,
the leader in global
consumer data.

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By working with Acxiom, brands can reach and engage more than two-thirds of the world's digital population.

2.5 BILLION CONSUMERS
ACROSS **62** COUNTRIES.

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