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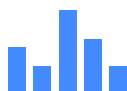
SMART SHOPPER MARKETING: THE DIGITAL KEY TO BE CLOSER TO YOUR CLIENTS

Consumer goods manufacturers, retailers and the consumer are moving closer together with Google's innovative technologies. These technologies offer big opportunities and benefits for all parties

By Dr. Nikos Kotalakidis



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Executive Summary

The Large Brand Manufacturers' Renaissance



The emergence of innovative start-ups, the expansion of private labels, drastic changes in consumer behavior and the economic downturn in many emerging markets are four important factors contributing to the current weak growth rates of large consumer goods manufacturers. However, the transformative power of digitization could free manufacturers from this difficult market scenario.



GROWTH ENGINE DIGITIZATION

In contrast to other industries digitization can lead to a renaissance of established companies in the FMCG world. Substantial financial and quality enhancing advantages can be found for these incumbents through sales and marketing in particular. In order to experience a growth spurt, manufacturers must leave digital project pilots in the past and commit to digitization on a broader level. Automatization, robotics, online communication, advanced analytics, and machine learning along with the internet of things, VR/AR, blockchain and cloud technologies play a crucial role in achieving a growth in sales.

Through the concentrated use of these technologies, the efficiency along the value chain increases, development times are reduced and consumer communication

can become more targeted and individualized. The change towards digitization will be most noticeable in sales and marketing. Ordinarily, a large portion of companies' budgets are spent on trade marketing activities. However, these activities are only an indirect way of communicating with the consumer. Through Smart Shopper Marketing – the direct communication with the consumer especially via mobile devices – manufacturers are able to overcome their limited communication with the consumer and unlock new growth potentials.



THREE CRITICAL ADVANTAGES OF SMART SHOPPER MARKETING

Through Smart Shopper Marketing, companies can better understand their customers, present their brand more favorably, and gain new possibilities to promote and measure sales. The key advantage to Smart Shopper Marketing is the additional knowledge gained about the needs and behaviors of the consumer. Through digital methods of communication, manufacturers can generate their own data and reduce the information imbalance between what retailers know and what manufacturers don't know.

New opportunities are emerging from advantages in four fields: cooperation with retailers online, cooperation with retailers offline, manufacturers' own online stores,



and manufacturers' own flagship stores. In particular, the establishment of manufacturers' own sales channels means that they learn more about their consumer because they own the data themselves. This in turn translates into an increased "Customer Lifetime Value".



MANUFACTURERS, RETAILERS AND CONSUMERS BENEFIT

By employing innovative marketing methods across all sales channels, FMCG manufacturers can address and guide the consumer's needs enabling additional sales, predominantly in retail stores. The consumer also benefits by receiving relevant messages at

the right moment saving them time and money, while ensuring the the best offer.

In order for manufacturers to create this win-win scenario, they need to further develop their approach and adapt their organization through an integrated sales and marketing strategy as well as a massive expansion of technological competence. The traditional separation of sales and marketing has proven to be outdated. The future belongs to combined teams in the same location. Such a reorganization promotes an indispensable cultural change along with a change of perspective within companies. Through this restructuring, the consumer moves to the center of all thinking and acting. By addressing the consumer's needs and wants, large brand manufacturers can free themselves from the difficulties of the current market. These companies hold the digital key for a new era of growth in their hands.

CHAPTER 1

Turning Point: How Digitization is Transforming the FMCG Industry

Large brand manufacturers are facing declining market shares and sales. With digital technologies they can manage the turnaround and intensify the relationship with their clients at the same time.



CHANGING ENVIRONMENT: WHY THE FMCG BUSINESS IS STAGNATING

The transformative power of digitization could prove to be a new engine of growth for the consumer goods industry and enable manufacturers to overcome their current small growth rates and their lack of knowledge about the consumer. Between 2012 and 2016, sales of large consumer goods manufacturers only increased by 0.7 percent per year. In the previous five years, the industry showed an average growth of a full 7.7 percent. The reasons for this stagnation include the recession and currency drops in many emerging markets, the rise of innovative start-ups, a growing popularity of private labels and changes in consumer behavior.

A return to the path of growth will only be possible if manufacturers further develop their strategy and begin

to anticipate tomorrow's developments today. This involves digital technologies. The transformative power of digitization can be the instrument for growth for the FMCG industry. Digital technologies reach the FMCG industry later than many other economic branches. The most important sales channel for consumer goods products, physical retail stores, have been competing with digital attackers such as Alibaba and Amazon. However, technological innovations are now available to the FMCG industry and many are being currently tested. These technologies have the potential to revolutionize the value chain in the industry and traditional brand manufacturers still have the opportunity to usher in these changes.

This study focuses on the most important and innovative area of digitization for consumer goods companies and how traditional brand manufacturers can catch up with their digital competitors short term – online communication.





INNOVATION IN ONLINE COMMUNICATION

Summer, sun, lunch-break – with some ice-cream this moment would be perfect. While this thought is still developing in the consumer’s head, a display ad already appears in the article that is currently being read. “50-cent-coupon for an ice-cream of your choice” together with the hint that the next place to buy is only 50 meters away. While this may sound like far-fetched technology of the future, it is already possible today using geo-targeting and programmatic advertising to create the rare win-win-win scenario. The consumer enjoys without researching, manufacturers know about this additional sale first-hand and retailers ring the cash register. Of course all of this is only possible if the consumer has previously agreed in accordance with the GDPR.

For years brand manufacturers have shifted their branding budgets away from traditional mass media outlets

to digital channels. In doing so, they have especially followed the changing media consumption behavior of the younger and middle-aged target groups. This trend will continue in the upcoming years because with digital channels manufacturers can create more efficient advertising and gain valuable data points, which they can use, in return, to improve their ongoing and future marketing strategies.

Although directly targeting the consumer could be one of the most innovative and efficient marketing methods for manufacturers, most companies have yet to target the consumer individually. With new products, signals of purchase intent analyses, precise targeting of programmatic buying and the possibility of automated bidding, this field is constantly becoming more important. Combined with the shift to mobile internet usage, shoppers have become more accessible to manufacturers than ever. The basis for this individual accessibility is Google’s Artificial Intelligence: the underlying algorithm that plays out, learns and continuously optimizes advertising.

CHAPTER 2

Smart Shopper Marketing: New Opportunities for Brand Manufacturers

More knowledge, more control and more possibilities to increase sales.
Manufacturers benefit from digitization in multiple ways.

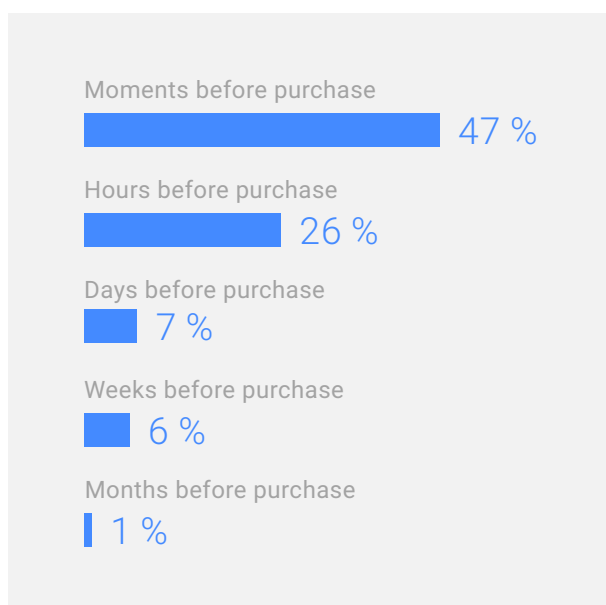


FIGURE 1: When the consumer researches groceries in Germany

Researching, buying, consuming. What used to take days or at least hours can now be done within minutes. Smart devices have revolutionized shopping and have made the consumer constantly accessible. For example, according to the Google Consumer Barometer every other German thinks about their grocery purchase only right before visiting a store (figure 1). Another indication for the changing purchase behavior: the number of searches for a ‘supermarket near me’ increased in Germany by 57 percent within one year. Similar developments can be observed for other FMCG products. These insights reveal that manufacturers have the opportunity to directly communicate with the consumer right before a purchase. This is the concept behind Smart Shopper Marketing.





DIRECT DIGITAL COMMUNICATION BETWEEN MANUFACTURER AND CONSUMER

What is hiding behind this catchphrase? At the core it is about establishing direct ways of communication between the manufacturer and the consumer that is partially retailer-independent and doesn't require cooperation. This type of communication is mostly executed through digital channels and is mainly aimed at:



- Better understanding of the consumer
- Better brand representation
- Better opportunities to increase and measure sales

With direct digital communication, brand manufacturers hold the key to more efficient sales and marketing through enhanced knowledge about their customer. It is not only manufacturers who benefit, but also the consumer who benefits through targeted marketing that creates new stimulation in online and offline retailing. The consumer receives relevant information, has a greater variety of products and can interact with brands more easily.



BENEFIT 1: BETTER UNDERSTANDING OF THE CONSUMER

Many brand manufacturers are in the dark with regard to their customers' needs and even more so in regard to their customers' actual behavior.

The main reason: large shares of brand manufacturers' marketing budgets are spent on trade marketing, and retailers are only willing to share some information, if any, about the success of certain marketing activities. Through digital communication channels manufacturers have the chance to generate their own data and to reduce this information imbalance. More importantly, digital communication channels generate data in real-time to identify and understand customer needs immediately.

With this know-how manufacturers can secure multiple advantages. These advantages include a more precise measurement of the marketing instruments' performance and the identification of entry points for targeted cross-selling. The more detailed the available information is, the better manufacturers can plan their stock and avoid empty shelf space. The customer data gained from digital communication can also play an important role in segmentation and portfolio optimization.

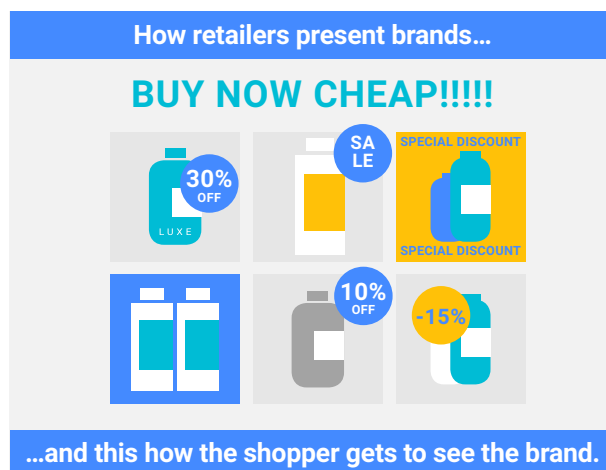


BENEFIT 2: BETTER BRAND PRESENTATION

Color, logo, packaging size and claim: brand manufacturers employ experts that work on every detail to perfectly present a product. But when selling through offline and online retailers they usually lose control over their brand's presentation. This holds true for weekly leaflets sent out by large retail chains as well as for the setting of the physical shelf space and the product's website integration. The more manufacturers are able to reestablish direct contact to their customers the greater the chances to avoid such stylistic incongruities. With flagship stores and websites, manufacturers can present their products in the right context and guide the perception of their brand (figure 2).



FIGURE 2





BENEFIT 3: BETTER OPPORTUNITIES TO INCREASE AND MEASURE SALES

When brand manufacturers establish their own communication and sales channels, the boundaries between production, marketing and sales increasingly begin to blur. These channels of communication allow manufacturers to not only gain more information about their customers, but they also stimulate an increase in sales. That is: with flagship stores and websites of their own, brand manufacturers can scale their sales across their own sales channels and thereby reduce their dependence on retailers.

TAKING ADVANTAGE OF ALL THREE BENEFITS WHILE REMAINING A VALUED PARTNER FOR RETAILERS: AN EXAMPLE

The German consumer goods company Beiersdorf, owner of the Nivea brand, recognized the opportunities the digital age had to offer early on and intensified their direct contact with the consumer. In 2006, they opened their first Nivea-Haus in Hamburg, 95 years after the product was developed. Now all of their products are readily available in their own e-commerce store. Beiersdorf is also using this e-commerce store

to sell exclusive product lines that are only available online. Thanks to these offline and online stores, the company is better able to understand their customers' decisions and to better control their brand identity. The positive effect on sales is also not to be underestimated. Nevertheless, Nivea's crucial partners remain retailers. And it has been shown that retailers also benefit greatly from the extended knowledge gained by Nivea. Custom fitted promotions, better presentation and targeted advertising have all increased the sales both for Beiersdorf and for their retail partners.

FOUR FIELDS OF ACTION: WHERE MANUFACTURERS CAN GAIN AN ADVANTAGE

Online or offline, through brands' own stores or through retailers: new opportunities emerge for manufacturers in all four quadrants of Google's Point-of-Sale-Framework through Smart Shopper Marketing (figure 3)¹. There are two main approaches: working with online and offline merchants, which is primarily about boosting sales, or brand's own online shops and flagship stores, which make a decisive contribution to the continued development of companies' marketing and sales strategies. These approaches allow manufacturers to learn more about their customers and thus have the opportunity to sustainably increase their "Customer Lifetime Value".

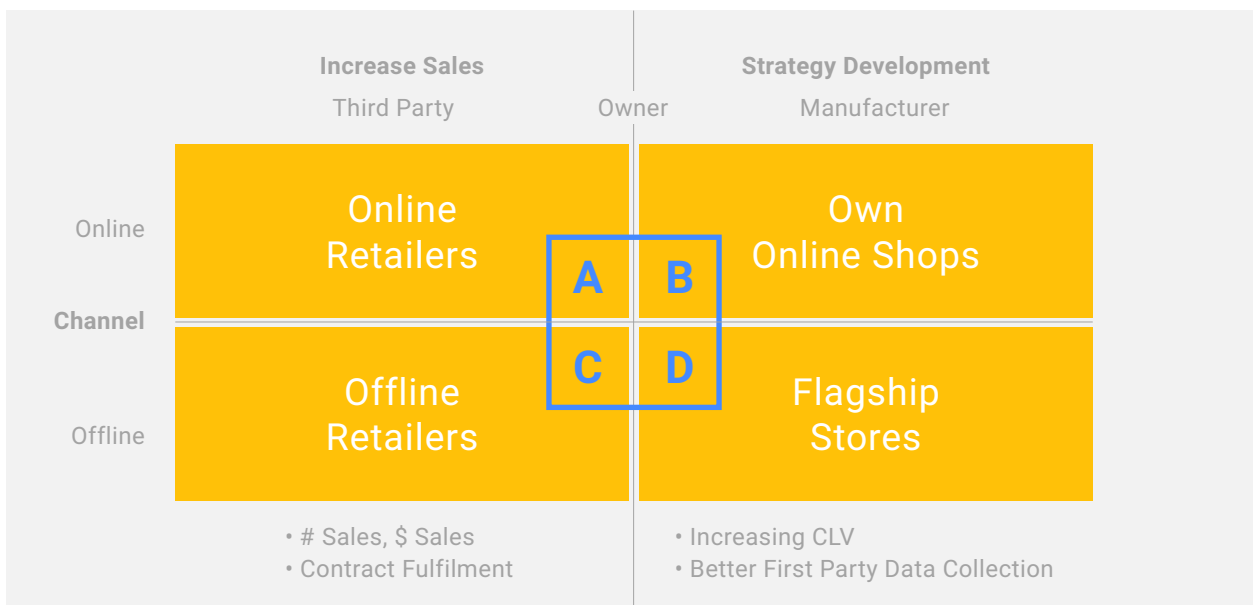


FIGURE 3: Where New Opportunities Are Emerging for Consumer Goods Companies
Source: ABCD Framework to activate the PoS through Smart Shopper Marketing

¹ For more information visit: <https://goo.gl/545mq6>





ONLINE RETAILERS: PRECISE TARGETED COMMUNICATION

Every tenth Euro of German retail sales is now accounted for by online retailers, and 14 percent of all non-food items are purchased online. According to the German Trade Association's current *Online Monitor*, two out of three German citizens buy online, and the rate of utilization is rapidly rising, especially among older people. As with banking, there is a shift away from stationary and towards mobile Internet. Thirty percent of online sales are already done on smartphones and an additional 13 percent on tablets. Spontaneous purchases and the desire to get a product as quickly as possible are crucial factors when reaching for one's smartphone to shop.

This changing consumer behavior is forcing consumer goods manufacturers to rethink their marketing strategies. Much more than before, manufacturers are able to influence the buying decisions at major online retailers such as Amazon and Alibaba.

The influence manufacturers can have over buying behaviors is exactly why large electronic manufacturers count on and use Google's **Sponsored Product Ads** (SPAs). SPAs are a new display ad format on an online retailer's website. The advertising space is managed by Google's algorithm. With targeted ads on online shops, manufacturers are able to remind the consumer about their products, even if they would usually not appear on the first page. On top of these targeted advertisements, with SPAs, manufacturers also automatically receive all shopper data in their Google Ads Account, including click, basket and purchase data.

An additional new product to improve sales and marketing strategies is Google's **Co-funded Shopping Ads**. These ads enable a manufacturer to book shopping campaigns for a specific retailer (with their permission); a practice that has been traditionally only possible for retailers themselves. With Co-funded Shopping Ads, the retailer benefits from additional traffic on their website, while the manufacturer receives the entire click and purchase data collected by the retailer.

While SPAs and Co-funded Shopping Ads are highly effective when the consumer has already decided to make a purchase, food and cosmetics manufacturers are already entering the race for the consumer's atten-

tion one step earlier. With online recipes or make-up tutorials, pioneers are already supporting their customers in everyday life. Chat-bots make such support easily available for the consumer enabling verbal interaction without the need to pick up a smartphone. **Google Home** offers chat-bots a "home". The interaction between man, machine and artificial intelligence is constantly becoming more and more natural, intuitive and easier.



MANUFACTURERS' OWN ONLINE SHOPS: PRESENTING ONE'S BRAND PERFECTLY

Of course, manufacturers can also directly enter the fast growing online trade. Many companies have been experimenting with their own online shops on their website.

The benefits are obvious: in their own virtual store manufacturers can present their products in a way that suits them, and their brand, best. They can autonomously decide on pricing strategies and test out different promotional activities. In addition, if manufacturers successfully guide enough visitors to their websites, they also receive a considerable amount of first party insights.

However, there are three remaining challenges. First and foremost, the consumer usually buys an entire basket of low-involvement articles like household goods and staple foods at once, and not just single items. Due to this, many online shops remain only niche offers. Second, customers have high expectations regarding the functionality of a website and professional logistics. Very few manufacturers are able to offer such functionality and professional logistics without cooperating with external partners. Third, online and offline retailers may interpret the start of manufacturers' own e-commerce activities as an attack on their traditional domain. In order not to jeopardize established relationships, it is advisable to involve at least the largest trading partners at an early stage. The better retailers understand why a manufacturer is setting up their own online shop, the more at ease they will be. The fact of the matter is: sound knowledge of customer behavior builds the base for successful Smart Shopper Marketing. This serves manufacturers and retailers equally.



The example of one of the largest water producers, Nestlé, makes this clear. Nestlé Waters realized early on that a brand without its own online shop can not understand its customers from A to Z because the important information right before the purchase and at the point of sale usually remains exclusive to retailers. In addition, the consumer today googles FMCG products for their daily needs making digital shelf space as important as the physical one.

Against this background, Nestlé Waters set up an online shop where private customers and business clients can purchase various water brands directly or by subscription.

By integrating an intelligent **Google Search Ads** marketing strategy into this new sales channel, Nestlé Waters lowered the cost per acquisition by more than 30 percent. For example, among other things, Nestlé used **Google's Geo-Targeting** to advertise specifically in locations with warm climates and high temperatures. All the information gathered on search, click and purchase behavior was used to optimize the marketing activities and to target audiences that also have a high probability of making a purchase. Not every consumer will only purchase online; some will go to an actual store. Physical retailers thus become additional beneficiaries of this digital advance.²

In addition to Google Search, Nestlé can also use all other Shopper activations on the Display Network and on YouTube, such as TrueView for Shopping. **TrueView for Shopping**, is optimized towards triggering a purchase, in this case, via a visit in Nestlé's online store. This way the user is approached holistically, and not exclusively on a single channel, when Google's algorithm finds direct or indirect signals that the user might be interested in buying water.



OFFLINE RETAILERS: UNDERSTANDING AND GUIDING CUSTOMER NEEDS

With over 10 percent of German retail sales attributed to e-commerce, 90 percent remain in the stores of major retailers. Smart Shopper Marketing enables brand manufacturers to set new stimulation offline. This is especially relevant in moments where the consumer is searching for particular articles on their smart device or are in close proximity to a store. Geo-targeting on Google Search, display, or YouTube,

beacons and wifi signals are readily available tools that allow manufacturers to localize smartphone users. In addition, stock management tools provide a real-time overview of whether and in what quantity certain items are in stock in respective retail stores.

Specifically, manufacturers are encouraged to enable **Affiliate Location Extensions** (free) in their Google Ads account. This feature shows shoppers which retailers close to them have, listed in their supply, the product searched for or advertised in a display ad or video.

A large diaper brand, for instance, uses **Affiliate Location Extensions**, as their starting point. They observed that young parents don't randomly search for their product, but are looking for a very specific article in a certain size. By employing Affiliate Location Extensions, internet users were given information about the availability of the product in neighboring shops – and in real time as they searched. This represents a real added value for stressed parents and is simultaneously the ideal opportunity for retailers and manufacturers to increase their sales.

But Smart Shopper Marketing is not limited to activities around the point-of-sale. With **YouTube's Trueview for Action**, for example, manufacturers can call attention to promotions that are currently happening at a retail store and herewith raise store traffic and sales and, of course, collect data. Alternatively, they can use this format to draw attention to a specific product or retailer information on their website.



FLAGSHIP STORES: WHEN MANUFACTURERS BECOME RETAILERS

In the digital era the boundaries between online and offline business are beginning to blur. Large e-commerce retailers like Alibaba and Amazon are moving towards owning physical stores, while almost none of the traditional retail chains are passing up on the opportunity of having their own online stores as well. At the same time retailers are increasingly pushing their private labels into manufacturers' traditional business domains. Consequently, manufacturers are countering this development by opening their own stores. Nike is a prime example, as they opened their own stores forming a precedent throughout different branches. However the function and focus of these stores

² For more information visit: <https://goo.gl/9CrmM>



for companies, like Nike or Beiersdorf with their Nivea-Haus, are not on building additional sales channels, rather they are predominantly centered on learning how customers react at the point of sale and bringing their brand experience to life.

An exception is the coffee business. In the 1970's Eduscho and Tchibo, manufacturer and retailer, were already closely interlocked. Since the 1990's chains from the US and the UK have been expanding worldwide. With the use of **Geo-located Google Display Ads** the British coffee shop chain Costa Coffee recently increased their store traffic and guided people thirsty for caffeine away from a competitor's store. On hot days they additionally advertised their cold drink product range – also precisely targeted geographically. Compared to previous campaigns the reach was 82 percent and the click-through-rate 32 percent higher. Interestingly, a detailed analysis of the campaign's performance revealed that this campaign not only worked extremely well for the thirsty consumer, but also created a consumer desire for an ice cold beverage simply by seeing the ad.³

SMART SHOPPER MARKETING MEANS COMMUNICATING INTELLIGENTLY AND EFFICIENTLY

Four areas of action, one topic: Innovative marketing allows FMCG manufacturers to stimulate and steer the needs of the consumer in order to realize additional sales – mainly in retail stores. Innovative marketing

also benefits the consumer. Delivering the right message at the right moment, saves the consumer time, by freeing them of the need to research, and money, by ensuring they get the best offers. The consumer's irritation with generic marketing messages gives way to the positive feeling that comes from being understood and supported in everyday life by manufacturers.

THE NEXT GENERATION OF SMART SHOPPER MARKETING: A SIMPLE PICTURE MAKES WISHES COME TRUE

Artificial intelligence, machine learning and augmented reality will create a whole new shopping experience in the coming years. **Google Lens** offers an early taste of the currently used artificial intelligence. This innovation provides relevant information to the user the moment they direct their smartphone camera at a particular object. Not only does it recognize the name of a product, but it also provides further information such as ratings, prices and reference locations – in short, everything a potential customer wants to know. For consumer goods manufacturers, this opens up completely new and essential possibilities for direct and highly targeted customer contact (figure 4).

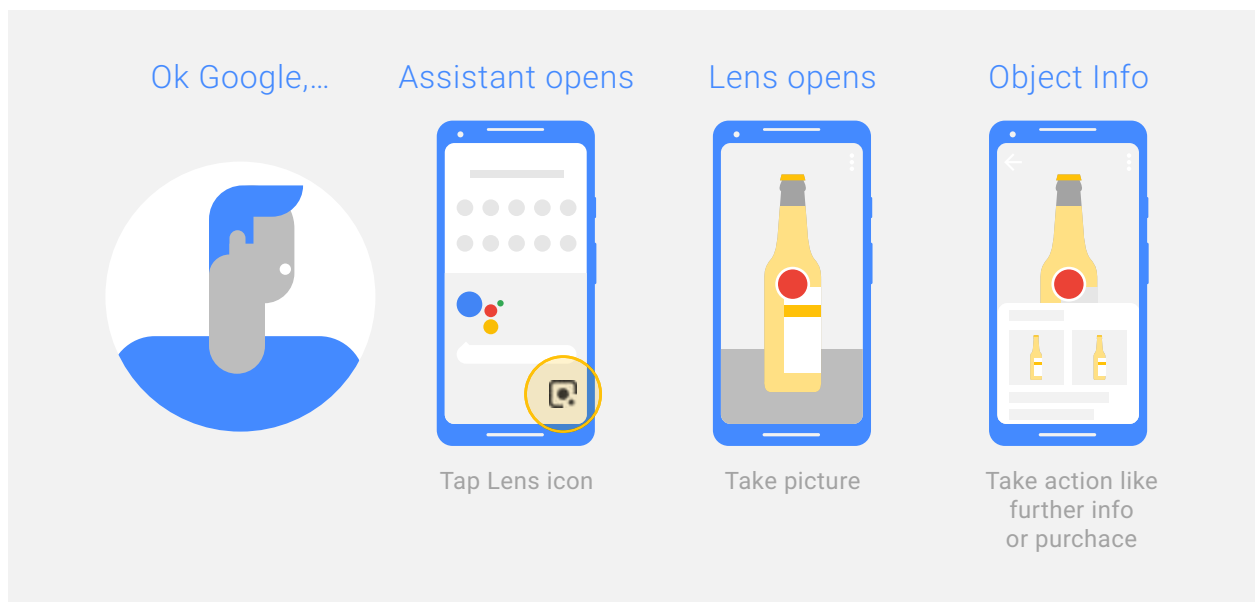


FIGURE 4: Your Google Assistant is one of many options to use Google Lens

³ More under <https://goo.gl/2F1ime>



CHAPTER 3

Moments that Matter: Focusing on the Consumer Means Focusing on the Micro Moments

To win the consumer for their product, manufacturers must be there at the most decisive moments – from first interest to actual purchase. These are the “Moments that Matter.”⁴ Google has found four key moments that are of central importance for Smart Shopper Marketing in the FMCG industry.

“I WANT TO BE...”-MOMENT

This moment is highly emotional and happens when a consumer is in the mood to be entertained, inspired, surprised etc. It is a rather passive moment in terms of purchase intent, but still allows brand manufacturers to address the consumer in a perceptive state in order to turn them on to their products. 90 percent of smartphone users aren't sure of the specific brand they want to buy when they begin shopping. Thus, these moments are a chance for advertisers and manufacturers to place their product at the forefront of the shopper's mind.

“IS THIS RIGHT FOR ME?”-MOMENT

In this moment, the consumer is actively looking for additional information on a product to make sure it is the right fit or them. This information could be online product reviews, questions on ingredients or allergens (e.g. “Is there lactose in cottage cheese”), questions about personal fit (e.g. “Is this the right moisturizer for dry skin?”) or ethical fit (e.g. “Is there palm oil in this product?”) of a product. These type of product fit searches have experienced a steady increase in recent years. For example, the number of searches for “gluten free” or “palm oil” have quadrupled over the past four years.

For low involvement products, active researching might not always occur, but that doesn't mean the shopper is not looking for the right product to fit their needs. With Smart Shopper Marketing, brand manufacturers can anticipate this moment of need enabling them to, for example, target health conscious fitness buffs with an ad for a high-protein ice cream bar on a hot day and explain the nutritional details of the product.

“I WANT TO GO/DO/BUY”-MOMENT

In this moment, the consumer shows a high purchase intent and is actively looking for a store nearby, or a

good deal on a product. They are specifically looking for information on special offers, opening hours, proximity and ratings. They also want to know if a particular product is in stock, or if a service is offered. The consumer's search for groceries and grocery stores are a prime example of this moment. The consumer is progressively searching for grocery products and stores on their smartphones. The number of searches for a ‘supermarket near me’ increased in Germany by 57 percent within one year. And 61 percent of smartphone users say they are more likely to buy from companies whose mobile sites or apps customize information to their location. Connecting to the consumer, in this moment, helps increase the mental availability of a product immensely and can therefore contribute to a boost in sales. It is, thus, crucial that manufacturers make desired information readily available and guide the consumer to the online or offline point of sale.

“HOW TO...?”-MOMENT

In this moment, the consumer is actively looking for solutions and insights to their problems or needs, but does not necessarily have a specific product in mind yet. Unlike the “Is this right for me?”-moment, the “how to...?” moment starts out from a specific need rather than a product. This moment occurs prior to the purchase (e.g. “What do I need for a tasty spaghetti dish?”) or after (e.g. “How long do I need to cook pasta for?”). Being there, in this moment, with the right content is key. Manufacturers can address the consumer in this moment and be the brand that solves their problem. The significance of this moment is demonstrated by the nearly 60 percent of millennials who use their smartphone as a “sous-chef” while cooking. 69 percent of smartphone users are more likely to buy from companies whose mobile sites or apps help them easily find answers to their questions. 48 percent of smartphone users are more likely to buy from companies whose mobile sites or apps provide instructional video content making this moment critical for manufacturers.

⁴ More under <https://goo.gl/xU6zSu> and <https://goo.gl/zwh1WZ>



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Christian Morisse was an Analytical Consultant at Google in the Consumer Brands & Electronics team responsible for international manufacturers in the FMCG, electronics and computer industries (christian.morisse11@gmail.com). His successor **Christoph Mittendorf**, has fully taken over this role (cmittendorf@google.com).

ABOUT THIS GOOGLE STUDY

Google has one of the most comprehensive and intersectoral innovation pipelines making it extremely relevant for consumer goods manufacturers. Along with pooling knowledge from various projects, this study is built on academic publications and exclusive data from Google. The study addresses the opportunities of digitization, the current transformation of the consumer goods industry and new ways of marketing. Additionally, readers can find multiple articles and case studies regarding the topic of Smart Shopper Marketing on Think with Google. (thinkwithgoogle.com/intl/de-de/)

Moreover, we would like to acknowledge the partnership with Bain & Company to establish this study. This version of the study relates directly to white paper (Smart Shopper Marketing: Digitaler Schlüssel zu mehr Kundennähe, 2018) published in cooperation by Bain & Company and Google written by Dr. Nikos Kotalakidis, Dr. Mario Häuptli, and Miltiadis Athanassiou.

