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THE DRIVE FOR DATA

The Future of Automotive Marketing in a Customer–Centric World

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Acknowledgements & Methodology

This white paper is based on contributions from over thirty automotive industry marketers—including senior executives representing manufacturers, dealers and dedicated service providers in North America and Europe—who offered their time and insights during a series of telephone and videoconference interviews between February and June 2020. Though their names are not listed in this report, they include many of the industry's most prominent thought leaders, and represent premier global brands that include BMW, Chevrolet, Ford, General Motors, Hyundai, Nissan, Subaru, Toyota and Volkswagen.

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TABLE OF CONTENTS

Executive Summary

When we kicked off this research initiative in February 2020, our aim was straightforward: identify how automotive marketers are using data in new and innovative ways. We hoped to bring clarity to a practice that had long been grounded in a narrow definition of "CRM"—but is increasingly setting the tone for how brand management, offers and digital experiences are to be orchestrated in a competitive marketplace driven more by "customer centricity" than ever before.

After just a few weeks of work, those priorities shifted. The coronavirus pandemic ushered in an economic, social and public health crisis of unimaginable scale, resetting business conditions—and reshaping business priorities—across virtually every nation and industry sector. No longer would it make sense to focus squarely on "data" exclusively for its own sake; instead, we would have to expand our focus to identify and explain more about the systemic forces working to drive paradigmatic change in how auto companies build, market and sell vehicles—while growing customer relationships that create value long after that initial transaction.

As it turns out, data is playing a more profound role in that change than we

originally envisioned. Across nearly 30 interviews (with senior marketers at OEMs, dealer groups and industry suppliers in North America and Europe), we learned:

■ **COVID-19 is accelerating the industry's shift to digital retailing.** The economic crisis brought on by the novel coronavirus has vastly intensified the auto industry's embrace of e-commerce as a platform for new car sales, as well as aftersales functions; online channels now represent the centerpiece of the auto marketing and sales effort

■ **But poor online experiences are undermining the full potential of the "digital shift."** Lackluster digital retailing experiences—characterized by misalignment of dealer and OEM offers, absence of real-time inventory access—may stunt burgeoning consumer interest in online buying

■ **Paths-to-purchase are fragmenting across a growing number of touchpoints, which is shining a new light on the importance of marketing attribution.** Many automakers remain steadfastly committed to TV and other traditional advertising media, even as customers

migrate their attention, interest and buying activity to digital channels

■ **Across the industry, available data is plentiful, but siloed approaches to managing it are inhibiting insights and activation.** Manufacturers and dealers maintain a bewildering array of distinct repositories for the customer, transactional and marketing performance data at their disposal—undermining its usefulness

■ **The current disruption is challenging auto marketers to rethink their approach to… everything.** The pandemic-sparked economic crisis has intensified the impact of systemic changes that were already upsetting long-standing norms governing how consumers buy and use cars

These five key conclusions, which we derived from our research about the current state of auto marketing, surfaced an important prescription for OEMs and dealers looking to take the next leap forward in how they apply data, technology, and digital media to improve marketing performance. **They're best served by tapping into diverse partner networks for help.**

COVID-19 ACCELERATING THE SHIFT TO DIGITAL

The economic crisis brought on by the novel coronavirus has vastly intensified the auto industry's embrace of e-commerce as a platform for new car sales, as well as aftersales functions; online channels now represent the centerpiece of the auto marketing and sales effort.

THE AUTOMOTIVE INDUSTRY has long maintained a complicated relationship with the Internet.

Even as their marketing counterparts in the retail, consumer product and other verticals shifted billions of dollars into digital advertising and e-commerce infrastructure over the past two decades, many auto manufacturers and dealers took a cautious approach to engaging the technology, media, data and process change necessary to support digital retailing. The reasons are myriad: the heavy influence of traditional sales reps, competing interests between manufacturers and dealers, and the complex requirements of back-end IT integration all conspired to stunt the growth of the Internet as a hub for auto *buying*, as well as consumer research.

But as it has in so many other ways, the coronavirus crisis has caused the auto industry to look past those dynamics,

forcing the closure of dealer showrooms around the world, shutting down production lines and introducing new, digitally-native buyers into the prospective customer funnel. (To that end, in April 2020 eMarketer found that nearly 30 percent of U.S. car shoppers who weren't previously open to buying a car digitally had recently changed their minds.) The choice facing OEMs and dealers was stark: adapt or die.

On an unprecedented scale—often with an eye on meeting burgeoning consumer interest in new mobility solutions, particularly in urban areas where car ownership has emerged as a new necessity given the risks associated with densely-packed public transit—the industry has resoundingly opted for the former, moving to improve online functionality with the goal of leveraging digital retailing channels as platforms for product discovery, research, configuration, pricing, purchase and more.

The task has not been simple, especially with respect to the complex integration of offers, inventory management and servicing that support good retailing experiences. But adopters have found that changing conditions have brought along both consumers and dealers previously hesitant to engage in "non-traditional" purchasing experiences. (One example: GM's "Shop. Click. Drive." program, a seven-year-old initiative that's reported a recent spike in buyer traffic of anywhere from two to four times normal activity.)

While virtually all stakeholders say that dealership experiences will long play a prominent role in the sales process for many consumers, the rapid expansion of activity on digital retailing channels over just a few months has many rethinking which touchpoint—online or in-dealership?—will represent the true centerpiece of the auto buying experience of tomorrow.

IN THEIR OWN WORDS

"I don't think anyone is anticipating a return to normal, but there is a feeling that what had previously been a slow, plodding shift to digital is now in hyperdrive. It's happening much faster than it was before"

– Dealer

"COVID-19 has certainly accelerated our plans [to digitize] and has convinced even our more luddite sales directors that we have to be more digital"

–Global Head of CRM, OEM

"Digital retailing is evolving rapidly due to COVID-19. Everyone is trying to sell cars online and incorporate new processes to do this...The struggle is that most dealers are wrestling with the need to change processes and salesperson incentives they've used for decades"

– Senior Executive, OEM

BY THE NUMBERS:

■ VW Credit unveiled a Sign Anywhere digital solution that supports signing paperwork digitally. Since going live in April 2020, the technology has supported 1,900 sales and lease transactions— and was, by July, available across 420 U.S. dealerships

■ According to a survey of car shoppers nationwide conducted in May 2020 by automotive shopping site CarGurus.com:

  ■ 20% of those planning to buy a car in 2020 hadn't planned to do so before the coronavirus pandemic

  ■ Meanwhile, 44% of those who had been using public transportation planned to decrease their use or stop entirely

"We've done more digital retailing deals in the past three months than we did in the past seven years combined. People still want to have the "buying a new car" experience, but with the benefit of knowing negotiation and financing are already taken care of [on our website]"

– Dealer

"Pure digital is the big battleground now, and everyone is fighting for that digital customer. The ones who interpret this data correctly—who can get a sense of who's really in-market for a vehicle, and deliver a smooth buying experience— are going to be the ones who win.

– Senior Executive, OEM

POOR ONLINE EXPERIENCES ARE UNDERMINING THE FULL POTENTIAL OF "DIGITAL SHIFT"

Lackluster digital retailing experiences—characterized by misalignment of dealer and OEM offers, absence of real-time inventory access—may stunt burgeoning consumer interest in online buying.

THE SHIFT TO DIGITAL RETAILING, while revealing pockets of new opportunity in how (and to whom) cars are sold, has likewise laid bare a harsh reality for consumers and auto marketers alike: many online car buying experiences are resoundingly poor.

Such sentiment is common among OEMs, dealers and the suppliers who've been working to help address that experiential gap. Consumers complain about broken functionality, misalignment of offers across manufacturer and dealer sites and "purchase" options that aren't accurately tied to real-world inventory. Dealers (especially those in Tier II and III of the industry, who typically don't have the robust marketing and content management resources of their larger peers) struggle with stale and undifferentiated creative content, and lament the lack of affordable digital tools that can support backend systems integration and reduce the considerable friction that customers often feel from having *already* visited multiple dealer sites in researching prices and options on a single vehicle model.

On one theme, though, virtually all stakeholders are aligned: better customer experiences—whether purely "digital" or reflecting a hybrid of interactions across online and real-world touchpoints—will require a richer, more accurate understanding of the customer and their needs (as informed by a wide range of data inputs, both provided by the customer and provided by third parties). But how to assemble that insight? And who should take the lead in doing so? Those are among the essential questions that will face the industry as it addresses the challenges of the customer experience battleground over the coming years.

BY THE NUMBERS:

■ As of May 2020, according to Cox Automotive, just 50 percent of independent dealerships had a digital retailing solution in place, even though consumers are complaining in greater numbers that the digital research and car buying process hasn't evolved with the times. In 2019, for example, 61 percent of car buyers said their online experiences were comparable or worse than those encountered during previous purchases

IN THEIR OWN WORDS

"There's a big paradigm shift happening right now. Will digital become the new showroom, or will the physical showroom remain the arena for consummating sales that are initiated through an online search? I think it will depend on whether the dealers themselves are strong enough to support configuration and pricing online."

– Regional Marketing, OEM

"The retail-level dealer was not prepared [for COVID-19]. They get the work they need to do done within the digital channels, but it's not state of the art, and there's a lot of improvisation and workarounds still there. They didn't need to use this technology until a few weeks ago, but now they're being forced to."

– Senior Executive, OEM

"Those who are winning are handling most of the dealer experience online, and people just go to pick up their car... I think there will be more conglomerates and buying groups, because individual dealers can't keep up digitally."

– Automotive Marketing Supplier

"Tech companies think about the customer experience first, while the auto companies think about the engineering first. This needs to shift."

– Automotive Experiential Supplier

"Historically, no one wanted to move toward an online experience, because the whole point of a dealer organization is to move people into the dealerships. There just wasn't a huge reason to push toward buying online."

– Automotive Marketing Supplier

"We have consistent issues with website providers that are, frankly, Neolithic in their technology, features and approach to service. No dealer wants to deliver that kind of experience— each has their own expectations for CX feel, and when they end up with a subpar website, the customer sees it."

– Dealer

FRAGMENTING PATHS-TO-PURCHASE ARE SHINING A NEW LIGHT ON THE IMPORTANCE OF MARKETING ATTRIBUTION

Many automakers remain steadfastly committed to TV and other traditional advertising media, even as customers migrate their attention, interest and buying activity to digital channels.

THE AUTO INDUSTRY'S PIVOT TO digital retailing, and the growing buying power of digitally native consumers, have fundamentally disrupted the path that many take to researching and buying a vehicle. Buyers now come from more diverse backgrounds—with needs, motivations and brand interests that are more individually unique than ever before.

That fragmentation suggests that car buying experiences ought to grow more bespoke to meet the individual needs of auto consumers, no matter whether the customer is exploring an entry-level compact sedan or a top-of-the-line luxury SUV. But advertising and marketing budgets in the auto sector are slow to change, and vast sums—equivalent to $15

billion in 2019, or roughly the same that was expended on *all digital channels combined*, according to eMarketer—are still invested in linear television, almost always with the expectation that splashy images of vehicles cresting mountain peaks or sailing down empty city streets will support brand discovery in much the same way it has for generations.

Today's savviest auto marketers are looking to break free of that mold. But doing so requires more than simply migrating spend to digital channels or improving the functionality of digital buying platforms. In fact, more brands are waking up to the realization that better attribution of promotional spend and its efficacy (as measured across various

consumer-facing touchpoints and use cases) is the key to orchestrating sales and marketing strategies that power incremental performance improvements and better enable overall customer experiences.

But attribution isn't easy, especially given the importance of measuring well beyond the "last touch" shared with the customer. It requires insight into customers and their interactions across a range of channels—including those managed by OEMs and dealers, business partners and even trusted third parties. It also requires a commitment to solidifying a data layer that is shared by the manufacturer and dealer, allowing the marketer to understand not just how well

their past efforts have performed—but also where and how future offers ought to be deployed to improve their impact and provide more value to the customer.

In many manufacturer organizations, the CRM function has traditionally owned this responsibility. But roles are shifting as data plays a more prominent role across the marketing suite, with chief data officers and similar leaders playing a more integral role in some companies, and with other firms taking a more disruptive path altogether—restructuring whole marketing departments (and media mix allocations) to respond more nimbly to what data reveals about customers and their response to various promotional touchpoints. (To date, however, that movement appears more prevalent in certain European markets, where smaller market sizes and lesser complexity in the OEM/dealer relationship allow for more efficient centralization of data-related marketing efforts—at least as compared to the U.S. marketplace).

BY THE NUMBERS:

■ The average new vehicle buyer engages with an average of 24 research touchpoints along their journey of researching a purchase, according to Dealerwebb

■ 65 percent of consumers spend longer than a month researching for vehicles, according to Deloitte, with 31 percent spending more than three months doing so

IN THEIR OWN WORDS

" Our old understanding of the sales funnel is dead. It's no longer linear and we have to meet customers, wherever and whenever they want, with relevant content. "

– Senior Executive, OEM

" Targeting the right customers needs to be more about understanding and responding to their needs from the very first interactions, hopefully by leveraging more predictive technology such as AI [artificial intelligence] and ML [machine learning]—and setting aside some of the old mass targeting efforts which are, frankly, a waste of money. "

– Innovation, OEM

" We do not have any real insight into the true performance of the 'Wild West' that still defines our top-of-the funnel media spend… We spend a huge amount on media and at least 20 percent is unaccounted for. "

– Senior Executive, OEM

DATA IS PLENTIFUL, BUT SILOED APPROACH TO MANAGING IT IS INHIBITING INSIGHTS, ACTIVATION
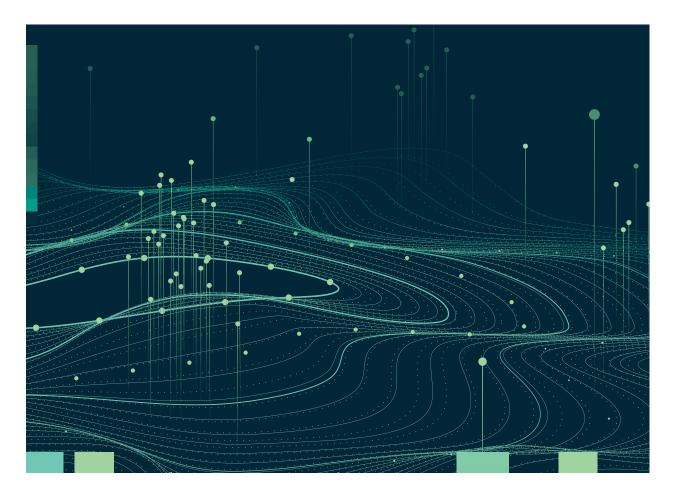
Manufacturers and dealers maintain a bewildering array of distinct repositories for the customer, transactional and marketing performance data at their disposal —undermining its usefulness.

FOR AN INDUSTRY THAT HAS FOR so long been dependent on *brands* as the focal point of its promotional effort, the automotive sales and marketing effort generates a tremendous quantity of data.

There's data on customers—provided by prospects, sourced from third parties and shared by business partners. There's data on finance, service and aftersales transactions. Data on marketing expenditures, digital retailing traffic and the browsing behaviors of customers *after* they've left the OEM or dealer website. And there's data from cars themselves, with telematics and connected car apps providing new insight into how people interact with their vehicles and even go

about their lives. So much data, and so much of it potentially useful in revealing real-time customer needs that could be applied to better experiences and offers. But as is so often the case among both OEMs and dealers, much of that data is maintained in independent functional silos— typically administered by an array of brands, marketing departments, IT functions, third-party suppliers and the like—with no overriding strategy or infrastructure in place to help the brand derive the maximum insight from the information already at its disposal.

Why invest so much in collecting data, only to manage it in such a way that undermines its usefulness? The challenge,

say many marketers on both the OEM and dealer sides of the industry, isn't technical. It's *political*, with data often representing a de facto currency that institutional owners can thus share, trade or broker as it suits their individual needs. And while that approach can address some important requirements—maintaining security of certain sensitive data assets, for example—it tends to provoke a range of functional challenges that inhibit marketing performance, diminish the quality of customer-facing experiences and fracture the relationships shared by various marketing stakeholders, as well as between OEMs and the dealers representing them in the field.

"Busting" those silos, some say, requires the kind of organizational reinvention efforts—already underway in some companies—that seek to install strategies to govern how data is used, who's tasked with its governance and what tools are deployed to support its management. But others (particularly dealers) are skeptical of such efforts, suggesting that the complicated nature of the OEM/dealer relationship reinforces the need to actually *maintain* certain data silos—with dealers naturally retaining a degree of autonomy over the customer insights that they originate.

Technology offers yet another path, with data management tools—highlighted by customer data platforms (CDPs) and similar self-service platforms—growing more sophisticated in their ability to administer distinct datasets, apply unique administrative rights to different users and feed back consolidated customer insights to other marketing technology platforms and dealer management systems, where it can be activated across a host of use cases.

BY THE NUMBERS:

■ Just 32 percent of all marketers say they are "confident" or "extremely confident" that their organization has the right expertise, skills and experience to support efforts to derive value from the use of data (IAB/Winterberry Group, *The State of Data 2020*)

IN THEIR OWN WORDS

"
Some OEMs still don't have—and can't get—access to real-time customer data; they rely on batch downloads that often deliver 'insights' that are often far too old to be of any value.... Fixing that problem is a clear area of focus and investment [for OEMs], but their legacy franchise agreements with dealerships prevent many from unilaterally enacting the change that's necessary.
"

– Automotive Marketing Agency

"
One of the biggest challenges we're wrestling with is the extremely disparate data landscape...The quantity and quality of data and tools has grown and fragmented significantly in a short time, and sorting out how to engage our agency partners and new technologies to leverage multiple databases is an issue that keeps us very busy.
"

– Senior Executive, OEM

"
We're dealing with all sorts of lingering issues that seem to originate from different technology camps. Our [dealership management system], for example, defaults to keeping all the data we collect and doesn't allow us to share it with anyone.
"

– Dealer

CURRENT DISRUPTION IS CHALLENGING AUTO MARKETERS TO RETHINK THEIR APPROACH TO... EVERYTHING

The pandemic–sparked economic crisis has intensified the impact of systemic changes that were already upsetting long–standing norms governing how consumers buy and use cars.

THE AUTO INDUSTRY HAS LONG been a harbinger of changes that would soon come to define our economy and way of life across multiple dimensions. Much of our history over the last century, in fact, can be closely mapped to innovations in auto technology, style, selling techniques and branding strategies—from tailfins to catalytic converters to compact SUVs to innovative lease agreements to splashy Super Bowl spots. The auto industry, in this respect, often reflects the cultural and economic zeitgeist years before our political leaders, news media and even Hollywood manage to catch up.

It should come as little surprise, then, that in a world in the midst of so much change—political, social, economic, technological—the auto industry is already knee-deep in confronting disruptions that are likely to change how cars are designed, built, marketed, sold and serviced for generations to come. Consider, for example, the vast shifts coming to redefine:

... WHO BUYS CARS, with the coronavirus crisis sparking renewed interest in car-sharing services and provoking first-time purchase activity among younger and more urban consumers

... HOW CARS ARE BOUGHT, with disruptor brands such as Tesla moving to disintermediate independent dealers from the buying ecosystem, and new purchase alternatives—as embodied by the Audi select subscription service—giving consumers different options to consider beyond traditional cash purchases, financing or leasing

... HOW CARS WORK, with hybrid vehicles coming to represent a feasible economic alternative for most consumers (and across most vehicle classes), electric vehicles gaining share (as charging stations grow more ubiquitous) and self-driving vehicles on the horizon as a next-generation technology that's beginning to garner serious interest

... HOW AUTO BRANDS ARE MANAGED, with OEMs attending renewed attention to the marks within the portfolios—with the focus of driving greater independent differentiation and, maybe, sunsetting certain "in-between" brands that no longer serve a clear-cut consumer need in the marketplace; and

... HOW PRODUCTS ARE MARKETED AND SOLD, with in-person venues such as auto shows and dealership floors—

traditionally the centerpiece of new-model marketing and sales, respectively—on indefinite hiatus as society wrestles with the impact of the coronavirus crisis and carmakers rethink the model by which their very "real-world" products should be packaged and promoted in a "digital-first" environment.

These changes impact every stakeholder group within the auto ecosystem—manufacturers and dealers, engineers and salespeople, senior executives and junior trainees. But the growing importance and intersecting roles of media, technology and data (especially as ingredients in delivering all-important customer experiences) are positioning *marketers* to play an increasingly crucial role in their organizations' transformations over the coming years. Marketers will—and in most cases *should*—own their brands' customer relationships, coordinate their use of innovative technology (including hubs for data management, automatic intelligence and machine learning) and orchestrate the complex interplay of product, offers and customer journeys.

BY THE NUMBERS:

■ $1.5 Trillion: the potential new addressable revenue that McKinsey projects may be addressable to the automotive sector by 2030—all of it stemming from shared mobility, connectivity services, feature upgrades and other new auto products and services.

IN THEIR OWN WORDS

" [In the future], we won't be advertising the same broad variety of brands that we market today—as much to improve our customers' experience and perceptions as to reduce complexity and cost on our end...In general, we need to become better attuned to matching our brands to the real-world needs of consumers, especially in emerging categories, and turning off brands that no longer have an audience. "

– Innovation, OEM

" Everything in the car is changing so fast each year, so having an open interface for every thinkable challenge is critical. "

– CRM Specialist, OEM

" Individualization and assisted driving/self-driving cars are the biggest industry changes looming, and it will open more channels for direct customer communication. "

– Senior Executive, OEM

"CAN WE TRANSFORM ON OUR OWN?" FOR MOST AUTO MARKETERS, THE ANSWER IS NO

Manufacturers and dealers are facing an unprecedented mandate to transform how they manage customer insights—and apply them to a renewed marketing effort. They're best served by tapping into diverse partner networks for help.

THE AUTO INDUSTRY HAS LONG been driven by the outsize role of "product" in dictating its business priorities. Engineers spec features, design cars and, in many organizations, have the ultimate say in deciding which models come to market—and which never make it off the drawing board.

Historically, that hasn't left much for the marketer to do beyond coordinating the work of branding, media placement and other "above-the-line" promotions. But auto marketing isn't straightforward— brands compete for share, dealers and OEMs compete for consumer attention and everyone is working to balance their priorities among new car sales and aftersales/service. These dynamics are changing fast, as the requirements of a digital-first economy—and an increasingly discerning consumer population—demand that brands better align and execute experiences, offers and content across a

host of touchpoints. That effort will be complex, and will require substantial and continuous inputs from data, technology and emerging media channels if it is ever to deliver results.

There's little question that most manufacturers (and even many dealers) have the financial resources to tackle that challenge. But the pace of change that characterizes today's marketing environment (as well as the relatively limited manpower in many auto marketing teams, at least as compared to similarly-sized enterprises in other consumer-facing verticals) means that many organizations will be perpetually starved for the expertise, bandwidth, tools and other assets needed to affect and sustain a customer-centered marketing transformation.

For these organizations (and most others), marketing supply chain partners offer a

solution—bringing executional capacity, tools and insight into cross-vertical best practices to help sustain the type of continuous innovation that will be needed to thrive in a marketing environment driven by dynamic *customer* needs more than static *product* specifications.

Many brands have already taken steps to elevate their approach to managing such entities, engaging with them more as consultative partners (rather than simply "vendors") to support dynamic content creation, data sourcing, integration and management, predictive analytics, crosschannel attribution and a range of other functions. This trend is almost certain to continue, as more brands recognize the limits of their internal capacity—and look beyond cost to recognize the potential value of maintaining a dynamic, multidisciplinary roster of suppliers.

IN THEIR OWN WORDS

" If there is a time where you can frighten a dealer and OEM into trying something radically new, now would be that time. Some may try to tackle these [data-oriented marketing] issues on their own, but I think it's probably better to put a mix of agencies and other third-party suppliers on the task; that would help moderate the heavy clout of certain dealer orgs, and offer us the choice to flex our spending and effort as we see fit. "

– Senior Executive, OEM

" There is essentially a fight for the customer at every level [of the automotive sales and marketing process]. Dealers, OEMs—everyone thinks they can do it better than anyone else… but they work best together when there is a mutual value exchange to keep everyone engaged and help to maintain better margins. "

– Automotive Marketing Supplier

BY THE NUMBERS:

■ Over 100 technology companies now self-identify as customer data platforms (CDPs)—reflecting the intense pressures felt by enterprise marketers (their target clients) to engage better solutions to support data aggregation and centralized management of customer insights.

■ 200: the number of disparate data points Subaru connected after implementing a CDP (Treasure Data)

ABOUT

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arm TREASURE DATA

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ABOUT WINTERBERRY GROUP

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A specialized management consultancy that offers more than two decades of experience and deep expertise in the intersecting disciplines of **advertising, marketing, data, technology** and **commerce**.

Winterberry Group helps brands, publishers, marketing service providers, technology developers and information companies—plus the financial investors who support these organizations—**understand emerging opportunities, create actionable strategies and grow their value and global impact.**

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