

A woman with short dark hair is shown in profile, looking at a smartphone. The scene is dimly lit with a strong blue tint, suggesting a nighttime or indoor setting with artificial light. The woman is smiling slightly. In the top left corner, there is a white circle containing the word "Econsultancy". In the bottom left, the text "Marketing in the Dark" and "Dark Social" is displayed. In the bottom right, the text "Watson Marketing" is visible with a small trademark symbol.

**Econsultancy**

# Marketing in the Dark

## **Dark Social**

**Watson Marketing** <sup>TM</sup>

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# 1. Executive summary

The second report in our *Marketing in the Dark* series, *Dark Social*, explores the impact of this growing phenomenon, and looks at how companies can interact with consumers appropriately and effectively in a world where consumers increasingly like to communicate in private. The research, produced by Econsultancy in partnership with IBM Watson Marketing, is based on an extensive survey of more than 1,000 marketers carried out during the summer of 2017.

The key findings of the report are as follows:



## **Dark social is a significant and growing challenge that marketers need to take seriously**

There is a growing body of evidence to show that consumers are increasingly sharing content privately, for example through messaging apps such as WhatsApp and Messenger, rather than on publicly accessible social networks where brands can more easily listen to, and track, what is being said about them, and what is being shared.

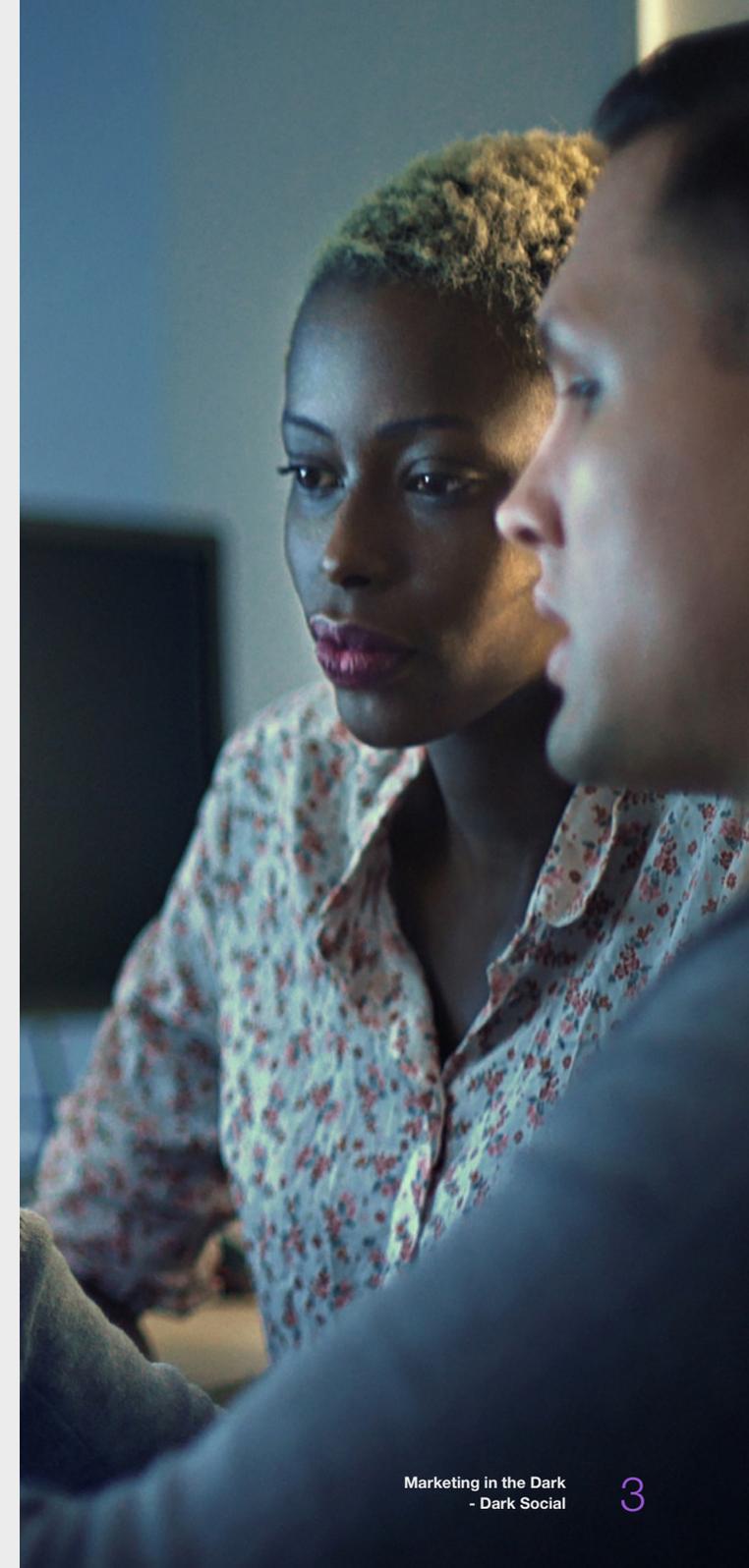
Simply put, dark social is sharing that cannot be accurately measured by a digital analytics platform. This represents a significant challenge for marketers seeking to understand the impact of their content on customer journeys and the path to purchase. Marketing attribution becomes more difficult because marketers are, in effect, making decisions based on an incomplete picture.



## **Marketers are underestimating the impact of dark social**

The majority of company respondents believe they have good visibility on the conversations their customers are having about their brands, even though there is strong evidence to suggest that this is increasingly difficult. In the context of being able to build a full picture of the customer journey, dark social is the technical challenge least likely to be on the radar for companies. Only 4% of all those surveyed for this study regard dark social as a top-three challenge, suggesting that most businesses are blissfully ignorant of a growing problem.

Research shows that the vast majority of consumers' outbound sharing from companies' websites takes place via dark social, resulting in a huge gap in the data required for a full understanding of customer behaviour. Leaders – defined as companies where marketing teams outperformed against their top business goal over the last year – are almost twice as likely to agree they can attribute value to dark social (39%, versus 21% of mainstream companies).





### More brands must start harnessing technology to mitigate the challenge of dark social, and to scale their customer interactions

While the vast majority of companies surveyed for this research are looking to increase the number of conversations they are having with customers, many are missing a fantastic opportunity to use tactics for engagement — at scale — that have been made possible by improving technology. AI-powered conversations, whether via voice technology or through text, will increasingly become the way that brands can most effectively reach the right customers with the right content and messages, framed in the right tone of voice.

Even among leaders, it is only a small proportion of companies that are using software such as *voice technology / interfaces* (25%), *computer-powered chat on site* (23%), *computer-powered chat on social media channels and messaging apps* (21%) and *product recommendations powered by chatbots / AI-powered chat* (19%).

AI-driven technology can help brands reduce costs (through more efficient marketing and customer service) and increase revenue through more relevant content and recommendations. When used properly, AI-powered chatbots and recommendation engines can also improve customer experience and brand advocacy.



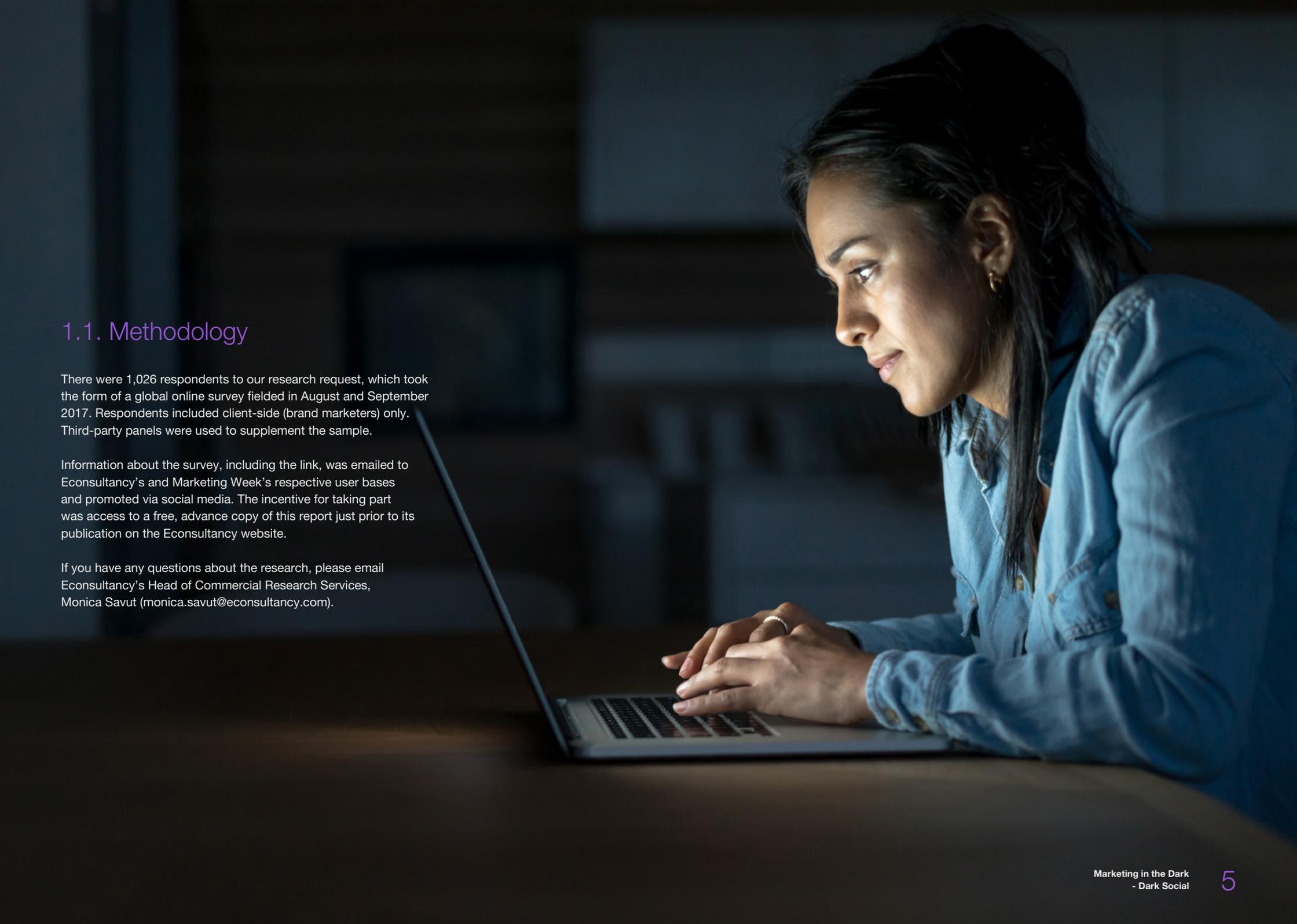
### Outperforming companies are more likely to be using WhatsApp and similar apps for AI-powered conversations

In order to tackle the issue of consumers retreating within the walls of dark social, brands need to find ways of engaging consumers in dialogue within private messaging apps. The huge popularity of messaging apps makes them a logical place for brands to engage with people. The focus for brands should be on utility and natural dialogue with consumers. Leaders are significantly more likely than their mainstream counterparts to be using social networks and messaging apps for computer-powered conversations. Outperforming companies are around twice as likely as mainstream organisations to be using the WhatsApp messaging platform (39% versus 20%) to engage in dialogue with consumers.



### Companies must continue to prioritise personalisation

Three-quarters (75%) of 'leaders' are personalising conversations based on tone and sentiment, compared to 60% of mainstream companies. While it is important to tailor marketing and messaging to individuals, companies must take the utmost care in how they approach one-to-one marketing. At a time when consumers are becoming more distrustful of brands that routinely collect data about them, marketers should focus on a persona-based approach that allows them to be highly relevant without needing to utilise data that personally identifies people. Companies can improve their engagement rates and sales without needing to piece together a perfect view of customer activity across all channels, the type of single-customer-view nirvana that has become increasingly difficult in a multichannel and multi-device world.

A woman with dark hair, wearing a blue denim shirt, is shown in profile, focused on her work on a laptop. The scene is dimly lit, with the primary light source being the laptop screen, which casts a soft glow on her face and hands. The background is dark and out of focus, suggesting an office or home workspace at night.

## 1.1. Methodology

There were 1,026 respondents to our research request, which took the form of a global online survey fielded in August and September 2017. Respondents included client-side (brand marketers) only. Third-party panels were used to supplement the sample.

Information about the survey, including the link, was emailed to Econsultancy's and Marketing Week's respective user bases and promoted via social media. The incentive for taking part was access to a free, advance copy of this report just prior to its publication on the Econsultancy website.

If you have any questions about the research, please email Econsultancy's Head of Commercial Research Services, Monica Savut ([monica.savut@econsultancy.com](mailto:monica.savut@econsultancy.com)).

## 2. Foreword by IBM Watson Marketing

Marketers have understood for a long time that brands are not tangible products or services, but the intangible thoughts and conversations that exist around those products or services. Understanding what those conversations are (what was said, when those conversations took place and why they took place) has been the quest of any good marketer for over a century. Some brands grew faster than others because they responded quicker than their competitors to certain conversations, and some brands died altogether because they didn't understand well enough what their customers were saying about them. And in that battle for mindshare (and 'share of wallet'), the companies with the biggest budgets and the best ads often won. As a result, smaller companies and startups were constantly on the back foot as they looked for ways to compete with their larger competitors.

But in 2004 everything started to change.

When Facebook was founded in Mark Zuckerberg's Harvard dorm room in February 2004, its mission to make the world more open and connected was to have epic implications on the way that brand marketers operated. But it wasn't until 2010 when Facebook turned its 'Pages for Business' into 'Brand Pages' that the playing field for smaller companies started to level out. All of a sudden it was no longer survival of the fittest where the brands with the biggest budgets could buy your attention, but it was survival of the fastest where smaller and more agile brands could leverage the network effects of Facebook's social graph in order to reach new customers at scale. Brands were no longer talking to one person at a time, but they were talking to all their friends, and all of their friends... and soon enough viral effects came into play and small companies started to radically disrupt the larger brands.

The main thing that made all of this possible was the advent of social listening. A brand's ability to use marketing technology in order to listen and respond to any conversations across social networks, blogs and forums revolutionised the way that brands were grown and products were sold. Social media became the one area where you didn't need to outspend your competitors in order to beat them.

Today, all of this has changed.

Not all customers appreciated being bombarded with ads, promotional messages, native content and sponsored stories, so customers did what customers always do when they don't like what's being offered. They went somewhere else. What we are now seeing is that all those conversations that brands used to listen to are now private. Conversations that used to take place publicly on Facebook, Twitter, LinkedIn, YouTube and other social networks are now happening behind closed doors on private networks. And the more emotional those conversations seem to be (passionate product recommendations or calls to join a new cause), the higher the likelihood of those messages being shared on Messenger, Snap, Line, WeChat, DM or email.

This is why we put this report together. To help you realise the growing important and economic impact of these shifts in consumer behaviour. And what you will realise as you read these pages is that even though most of this seems obvious, the marketing industry still fails to recognise the importance of this radical shift. We hope that it not only helps inform you about changes in our industry, but that it inspires you to become a better marketer.



Jeremy Waite

Evangelist  
IBM Watson Marketing

### 3. Introduction

This *Dark Social* study is the second in our three-part series of *Marketing in the Dark* reports, published by Econsultancy in partnership with IBM Watson Marketing. The first report in the series covered *Dark Data*<sup>1</sup>, while the final report will focus on *Dark Martech*.

The unifying theme of these three reports is the premise that too many companies are making marketing decisions while they are, in effect, blindfolded. As this report shall explore, this is increasingly true in the context of social media, with a range of technology- and consumer-related trends making it more difficult for marketers both to engage with consumers on social channels, and to understand their behaviour.

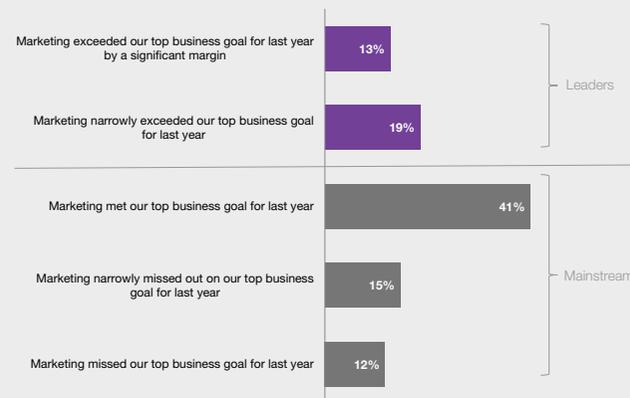
#### Defining marketing leaders

Based on a survey of more than 1,000 senior marketing professionals carried out during the summer of 2017, this report shows how 'leaders' are approaching social-related marketing activities, compared to what we term 'mainstream' companies.

As shown in *Figure 1*, leaders (32% of the sample) are those organisations whose marketing functions exceeded their top business goal for the previous year, as opposed to simply meeting them, or missing them.

We firmly believe that marketing capabilities will increasingly come to define overall commercial success across all business sectors, as leaders capitalise on the power of data and technology to widen the gap between themselves and their laggard competitors.

Figure 1: Thinking about last year's performance, which statement best describes how marketing performed against its top business goal?



<sup>1</sup> TBC



## 4. What is dark social?

'Dark social' is a term that was first coined in 2012 by Alexis Madrigal, writing for The Atlantic<sup>2</sup>. The premise is that the sharing of content and links that is visible to brands is only the tip of the social iceberg.

The reality is that most social sharing is not typically picked up by brand antennae because the sharing is largely done through email and messaging apps, with the traffic generated from referrals not detectable by most analytics tools. According to a 2016 study by RadiumOne<sup>3</sup>, 84% of consumers' outbound sharing from publishers' and marketers' websites takes place via dark social.

Our research suggests that many brands are only just waking up to this challenge, having historically been very much preoccupied by what they can more easily measure on sites such as Facebook and Twitter, at least where information is public.

Figure 2 shows that only 4% of all companies surveyed for this study regard dark social as a top-three challenge in respect of their ability to build a joined-up view of the customer journey.

Far from being recognised as a significant issue that curtails their ability to understand customer interactions, it is, in fact, at the bottom of their list of concerns, far behind other issues such as *complexity of customer experience* (46%), *difficulty unifying different data sources* (43%) and *poorly integrated marketing technology* (38%).

Figure 2: What technical barriers do you face in trying to build a joined-up view of the customer journey?



So why are organisations not more alive to this challenge? For many companies, there is a lack of awareness about the issue. While some may have taken steps to mitigate this problem by improving their visibility of traffic coming from dark social, for example through more granular use of digital analytics and understanding of 'direct traffic', the reality is that there is no perfect solution to this problem. Worse still for marketers trying to understand what truly makes their customers tick, people are often more inclined to share content privately when a strong emotional response has been elicited.

With this shift in power to the consumer (in some ways a throwback to the early days of the internet when instant messaging, chatrooms and forums were hugely popular), the onus is very much on brands to find ways of engaging with prospects and customers on social channels, and getting a better understanding of what is happening beneath the veneer of publicly accessible information. The unfortunate reality is that a huge proportion of social ad spend goes to social networks even though this kind of social activity is just a small piece of the jigsaw.



Only 4% regard dark social as a top-three challenge in respect of their ability to build a joined-up customer journey.

The problem faced by marketers is compounded by the fact that consumers want brands to limit the personal data they collect. Research by Tune, a mobile marketing provider, shows that more than half of US and UK smartphone owners say advertisers should not be collecting any data at all<sup>4</sup>.

The only way forward for marketers is to find ways of being welcomed into the private world of consumers, for example through customer service and content that truly resonates. This will be explored further later in the report.

It should also be borne in mind by companies that a large proportion of content that is shared through dark social emanates from email marketing campaigns, and is shared privately through email as well as messaging apps or private social networks. Email continues to be an incredibly important marketing channel both for B2B and B2C businesses, with a plethora of opportunities for brands to both influence and drive sales. In the context of dark social, companies must ensure that content likely to be shared in email campaigns is clearly identifiable as their own, whether through text or imagery.

<sup>2</sup> <https://www.theatlantic.com/technology/archive/2012/10/dark-social-we-have-the-whole-history-of-the-web-wrong/263523/>

<sup>3</sup> <https://radiumone.com/darksocial/>

<sup>4</sup> <http://www.emarketer.com/Chart/Amount-of-Data-that-Advertisers-Should-Allowed-Collect-According-UKUS-Smartphone-Owners-Jan-2016-of-respondents/188049>

## 5. The social conversation

It is clear that brands are striving for a more conversational approach to marketing and ecommerce. The vast majority of companies surveyed for this research are looking to *increase the number of conversations* they have with their customers. As can be seen in *Figure 3*, 88% of those companies we have identified as leaders agree that this is the case, while 73% of mainstream companies also concur.

However, while the tactical benefits of more social conversations are widely appreciated, fewer companies are tapping into these conversations to steer the company ship at a more strategic level. More than half (58%) of leaders are actively *using social media conversations to guide strategic decisions*, but this number drops to 41% for mainstream companies.

Companies must strive to develop a personalised approach that produces higher engagement with their brands and, ultimately, more sales. A key theme of the first report in this series — on Dark Data — was the important distinction between the types of personalisation that are possible for known customers, compared with unidentified, prospective customers. More than half (51%) of respondents said they were ‘advanced’ or ‘intermediate’ in their personalisation approach to known customers, compared to just over a third (37%) who claimed this level of sophistication in their marketing to unidentified prospects.

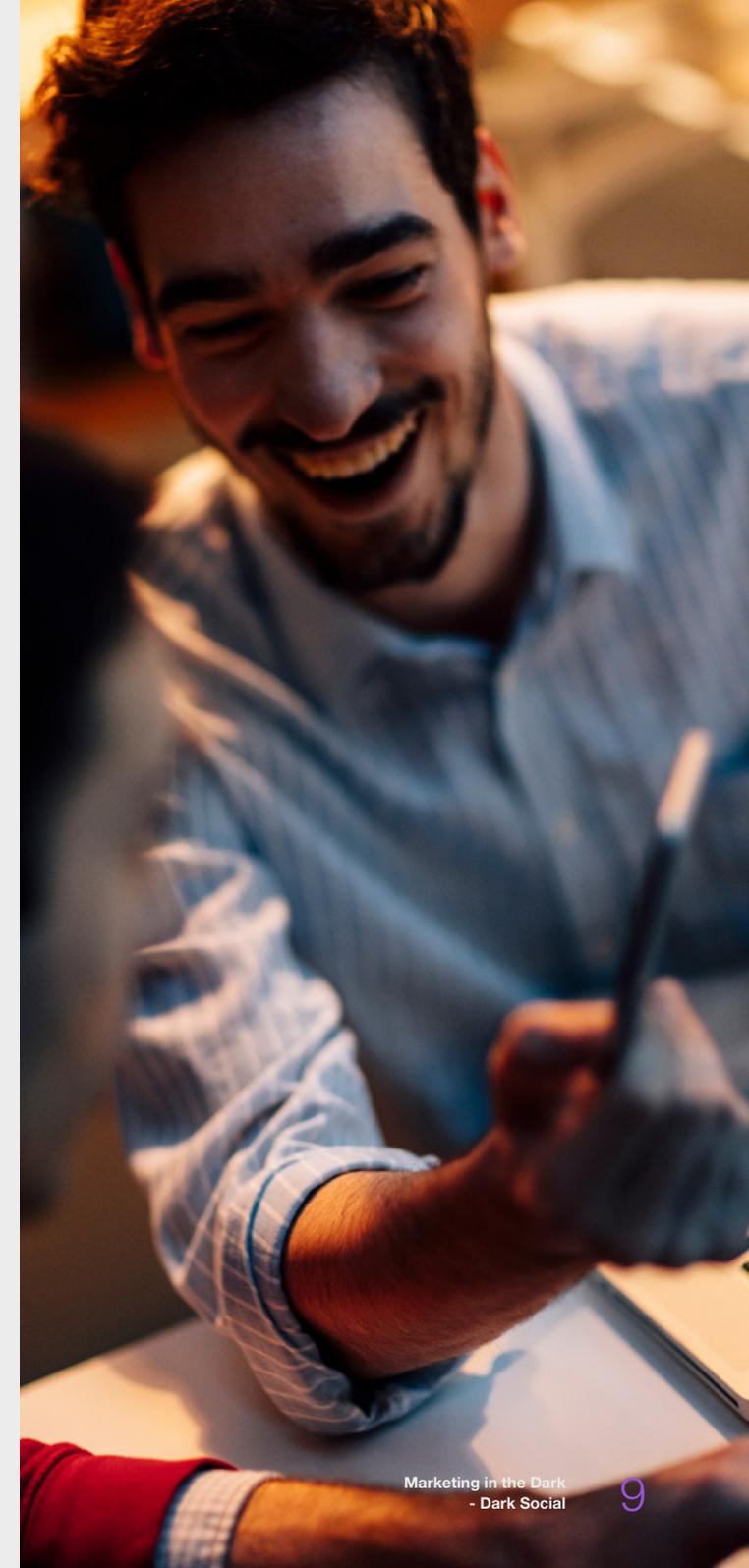
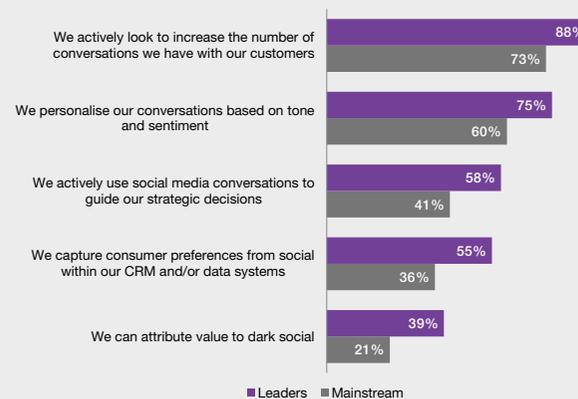
**More than half** of leaders are actively using social media conversations to guide strategic decisions.



Notwithstanding the challenges created by dark social, engaging with customers and prospects on social media can bear many fruits for companies, at both a strategic and tactical level. *Figure 3* shows the extent to which companies are harnessing social conversations for personalisation at an overall level. Three-quarters (75%) of leaders are personalising conversations based on tone and sentiment, compared to 60% of mainstream companies.

### Leaders versus mainstream

Figure 3: Proportion of respondents agreeing with social-related statements





Fewer companies say they are capturing consumer preferences from social within their CRM and/or data systems (55% of leaders and 36% of mainstream companies). This type of personalisation can be effective, but companies need to tread very carefully to ensure that they are not alienating their customers through overzealous or even illegal use of personal information.

Given the rising levels of consumer distrust around companies' use of personal data, marketers are on much safer ground when it comes to conversations with unidentified prospects.

Underscoring the importance of an approach more based on generic personas, rather than actual individuals, Gartner<sup>5</sup> has come up with the term 'personification' to describe "the delivery of relevant digital experiences to individuals based on their inferred membership in a defined customer segment, rather than their personal identity".

The focus for brands needs to be on more personalised and human connections that resonate with customers and prospects, while taking care that they respect the privacy of their audience.

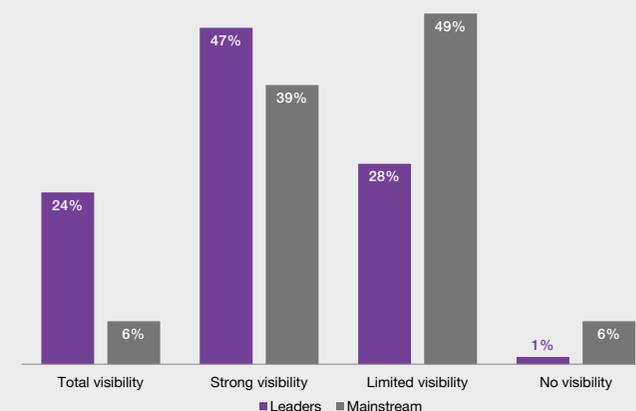
Figure 3 also underscores the difficulty that companies have in attributing value to dark social. Only 39% of leaders and 21% of mainstream companies say they can do this.

Notwithstanding the difficulty associated with attributing value to dark social, our survey shows that many marketers – particularly those we have identified as leaders – believe that they have good visibility into the conversations their customers are having about their brands. Almost three-quarters (71%) of leaders say they have 'total' or 'strong' visibility on this, compared to 45% of mainstream companies (Figure 4). In total, 54% of respondents believe that they have total or strong visibility.

Given the scale of the dark social problem identified in the previous section, the chart suggests that many companies have a rose-tinted view of their ability to know what is being said in private about their brands.

#### Leaders versus mainstream

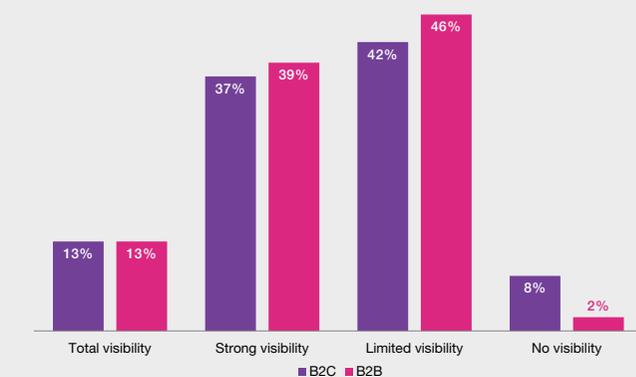
Figure 4: How much visibility do you personally have into the conversations your customers are having about your organisation / brand?



Interestingly, as can be seen in Figure 5, there is not much difference in the level of visibility that B2B and B2C respondents have into conversations about their brands, even though B2B brands often have a smaller and more well-defined set of customers to keep track of.

#### B2C versus B2B

Figure 5: How much visibility do you personally have into the conversations your customers are having about your organisation / brand?



<sup>5</sup> [https://blogs.gartner.com/andrew\\_frank/2015/03/20/the-personification-of-digital-marketing/](https://blogs.gartner.com/andrew_frank/2015/03/20/the-personification-of-digital-marketing/)

# 6. Scaling customer interactions

The greatest challenge facing marketers seeking to improve the way they engage with their customers is *lack of resource (time/money)*.

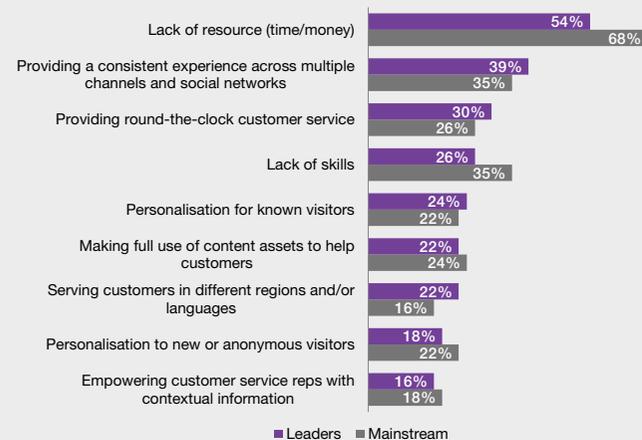
More than half of leaders (54%) and two-thirds (68%) of mainstream respondents cite this as a top-three challenge (Figure 6), ahead of other issues such as providing a *consistent experience across multiple channels and social networks*, and providing *round-the-clock customer service*.

While leaders might not face the same resource barriers as their mainstream counterparts, other challenges are widespread and will need to be addressed to develop a successful engagement strategy.

The problem of achieving scale is also borne out by Figure 7. This chart shows that only 41% of respondents agree that their companies can *scale their social media customer care across multiple languages and markets*, compared to 59% who disagree.

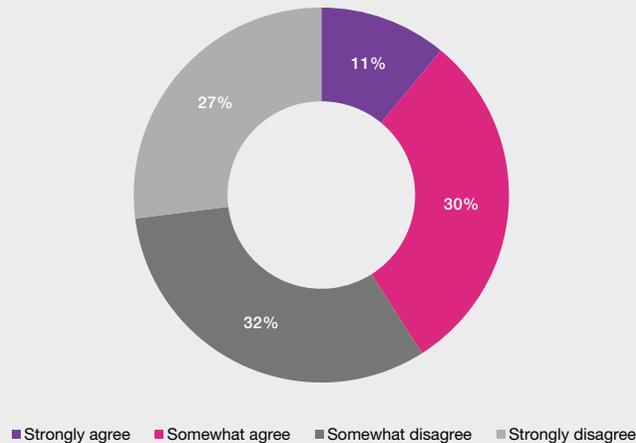
### Leaders versus mainstream

Figure 6: What challenges do you face in improving the ways in which you engage with your customers?



Methodology note: Respondents could check up to three options.

Figure 7: 'We can scale our social media customer care across multiple markets and languages' – agree or disagree



The good news for companies struggling with a lack of resources and an inability to meet customer care needs effectively on a 24/7 basis is that technology can help them provide a better service in a way that is both scalable and affordable.

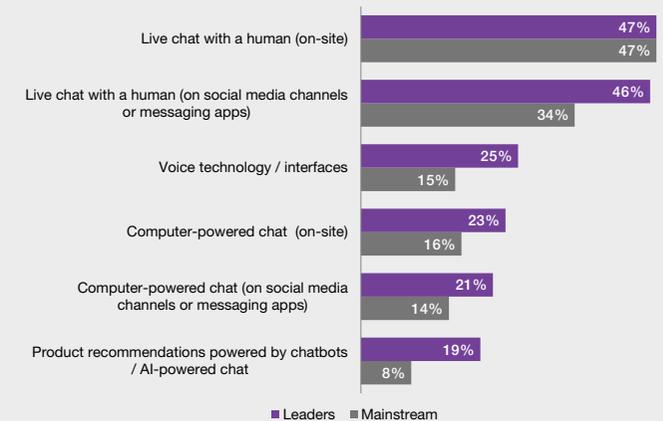
Figure 8 shows the technology-related tactics that companies are using – or planning to use – in order to engage with, and market to, customers and prospects at scale. Even among leaders, it is only a small proportion of early adopters that are using already-available software such as *voice technology / interfaces* (25%), *computer-powered chat on site* (23%), *computer-powered chat on social media channels or messaging apps* (21%) and *product recommendations powered by chatbots / AI-powered chat* (19%).

Leaders are significantly more likely to be using all these tactics, apart from *live chat with a human (on-site)*, which is the most commonly used tactic. This type of technology application, which certainly has its benefits though is difficult to scale, is used by the same proportion of leaders and mainstream companies (47%).

Figure 9 shows greater uptake of some of these tactics by B2B companies, but even for this segment of respondents, usage percentages are modest.

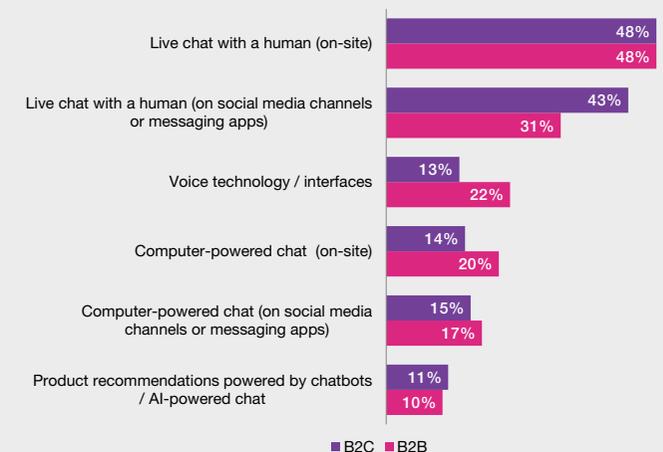
### Leaders versus mainstream

Figure 8: Proportion of companies currently using these tactics, technologies and strategies



### B2C versus B2B

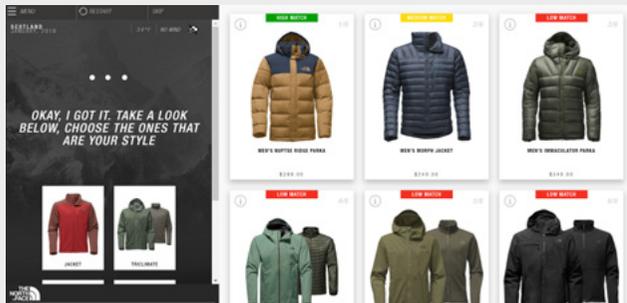
Figure 9: Proportion of companies currently using these tactics, technologies and strategies



The under-utilisation of these tactics represents a fantastic opportunity for companies to steal a march on their competitors. The growth of voice technology is a case in point, and one of the most important trends since the arrival of the internet. Gartner predicts that, by 2020, around 30% of searches will be done without a screen<sup>6</sup>. Computer-powered conversations, whether via voice technology or through text, will increasingly become the way that brands can most effectively reach the right customers with the right content and messages, framed in the right tone of voice.

### The North Face, Hyatt Hotel and KLM lead the way

A great example of this type of AI-powered conversation in action is the application of IBM Watson technology to help customers of The North Face<sup>7</sup> to pick out the right type of jacket. Rather than filtering through products, prospective customers can type in answers to questions in the same way as they might engage with an in-store staff member. As *Figure 9* shows, this is still a very embryonic area of commerce, with only around one in ten companies using product recommendations powered by AI.



The North Face is exploring AI technology with the help of IBM Watson

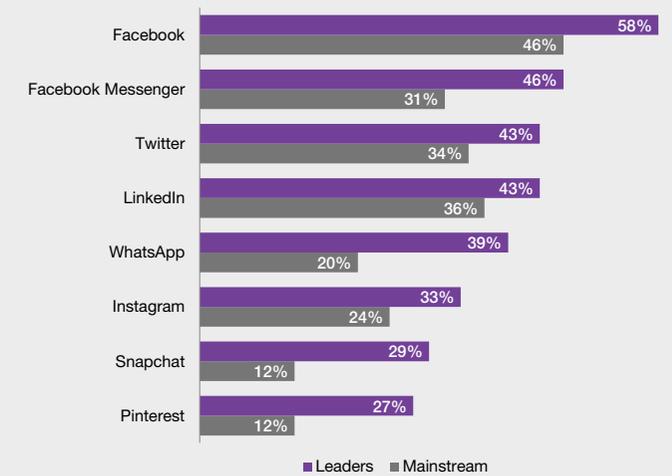
The huge popularity of messaging apps makes them a logical area of focus for brands when it comes to instigating conversations with consumers. According to Business Insider<sup>8</sup>, the combined user base of the top four chat apps (WhatsApp, Messenger, WeChat and Viber) overtook the combined user base of the top four social networks (Facebook, Instagram, Twitter and LinkedIn) in 2016.

The onus is on brands to communicate with customers and prospects where they are, rather than expecting them to come to their websites and download their apps. The focus for brands should be on utility so that the dialogue with consumers is natural, whether taking place on messaging apps or on their own digital properties when they do have a reason for visiting. Chat apps also benefit from high retention rates, while having attractive demographics for companies to target.

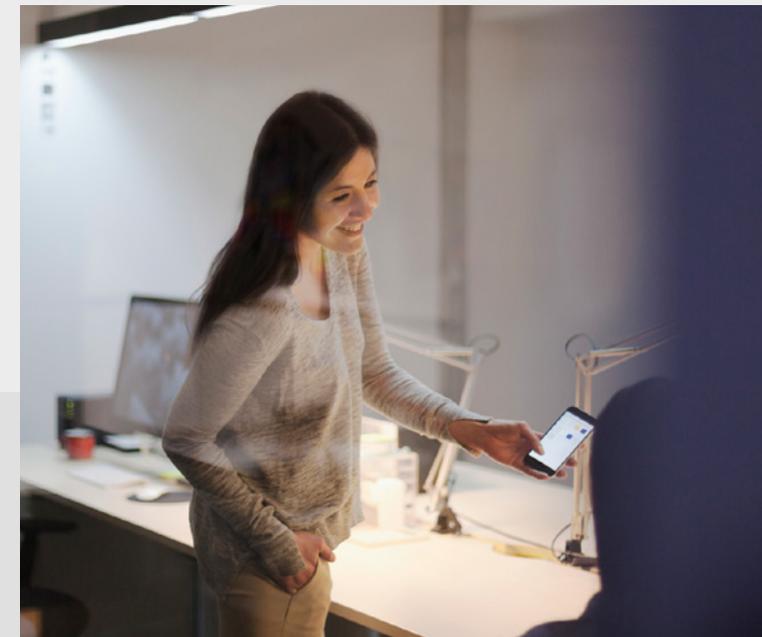
Conversational commerce is already working for many businesses. Other good examples include the Hyatt Hotel chain that allows guests to order towels or to use Messenger to order room service, and the airline KLM which has a bot (BB or BlueBot) for ordering tickets.

*Figure 10* shows which specific channels and messaging apps are currently being used by those companies that are using or planning to use computer-powered chat. Leaders are significantly more likely than their mainstream counterparts to be using the full range of social networks and messaging apps for computer-powered chat, including Facebook, Messenger, Twitter, LinkedIn and WhatsApp. In the case of WhatsApp, leaders are twice as likely as mainstream companies to be using or planning to use the messaging platform (39% versus 20%).

Figure 10: Proportion of companies currently using the following channels and apps (those currently using or planning to use computer-powered chat on social channels or messaging apps)



Leaders are **twice as likely** as mainstream companies to be using or planning to use the WhatsApp messaging platform for computer-powered chat.



<sup>6</sup> <https://www.mediapost.com/publications/article/287073/gartner-predicts-30-of-searches-without-a-screen.html>

<sup>7</sup> <https://www.thenorthface.com/xps>

<sup>8</sup> <http://uk.businessinsider.com/the-messaging-app-report-2015-11>

## 7. Five key steps to joining the social conversation

1

**Improve your visibility of dark social activity.** The first step towards improving your ability to track dark social activity is acknowledging that there is a problem in the first place. Once your company accepts the need to understand and influence dark social activity more effectively, you can take steps to measure it, and encourage customer behaviour that is easier to track. In terms of measurement, configure your digital analytics platform to give you a better understanding of what proportion of 'direct' traffic is actually coming from people who have had a URL shared with them, rather than typing it in directly in their browser<sup>9</sup>. Display prominent social sharing buttons (with trackable links) on your website, including relevant channels such as messaging apps.



2

**Focus on 'personification' rather than true personalisation.** Research shows that 55% of consumers no longer want to give any data to marketers<sup>10</sup>. Consumers are increasingly wary of companies that harvest and store personally identifiable information (PII), and this is reflected by increasingly strict regulation such as the forthcoming EU General Data Protection Regulation (GDPR). Rather than true one-to-one personalisation based on PII data, you should increasingly embrace 'personification' which means a more persona-based approach that relies on implicit data and intelligent inferences.



3

**Harness AI technology to kickstart conversational commerce.** Artificial intelligence – or 'augmented intelligence' – is allowing companies to interrogate huge volumes of data at scale, with the aim of improving marketing and customer service. While the use cases are varied, in the context of social interactions, marketers should be embracing technology that allows them to have one-to-one conversations with customers and prospects at scale. AI-powered chat on both first-party digital properties and third-party messaging apps is a fantastic opportunity to be in the conversation. You also need to prepare for the ongoing shift to voice search, a trend that is radically changing the way we communicate with brands.



4

**Focus on customer service and utility rather than selling.** It is important for brands to focus on utility and customer service as part of a natural dialogue rather than advertising and pushing messages that consumers may not be interested in. You should consider reallocating budget from social display advertising to more service-focused programmes that give consumers a reason to interact with you. In the context of voice technology and Alexa Skills, the gambling company Paddy Power recently emphasised the need to cater for that 'raw chicken on your hands' moment<sup>11</sup>. It's much easier to tell Alexa to set you a cooking timer rather than washing your hands and using your phone to do this. Be genuinely useful.



5

**Don't forget about email.** Email is still the cornerstone for many customer journeys in both a B2B and B2C context, and is therefore a crucial channel for brands trying to instigate a particular action. A large proportion of links that are shared through dark social initially originate from email marketing campaigns. While some brands are reaping the benefits of investment in bots for messaging apps, another plus for marketers is that good old-fashioned email – which should be regarded very much as a social channel in the context of sharing content and links with friends and family – still plays a hugely important role in the customer journey.



<sup>9</sup> <https://econsultancy.com/blog/67529-the-rise-of-dark-social-everything-you-need-to-know>

<sup>10</sup> <http://www.emarketer.com/Chart/Amount-of-Data-that-Advertisers-Should-Allowed-Collect-According-UKUS-Smartphone-Owners-Jan-2016-of-respondents/188049>

<sup>11</sup> <https://econsultancy.com/blog/69473-what-paddy-power-learned-about-voice-interfaces-by-creating-an-alexa-skill>



## About Econsultancy

Econsultancy's mission is to help its customers achieve excellence in digital business, marketing and ecommerce through research, training and events.

Founded in 1999, Econsultancy has offices in New York, London and Singapore.

Econsultancy is used by over 600,000 professionals every month. Subscribers get access to research, market data, best practice guides, case studies and elearning – all focused on helping individuals and enterprises get better at digital.

The subscription is supported by digital transformation services including digital capability programs, training courses, skills assessments and audits. We train and develop thousands of professionals each year as well as running events and networking that bring the Econsultancy community together around the world.

Subscribe to Econsultancy today to accelerate your journey to digital excellence.

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## About IBM Watson Marketing

Watson Marketing gives marketing professionals the power to uncover new levels of actionable insights, deliver impactful and personalised experiences that customers want and value, and discover innovative ideas that provide a competitive edge.

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