

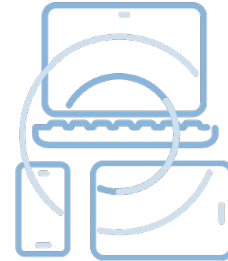


Looking at Audience Strategies for Insurance Clients

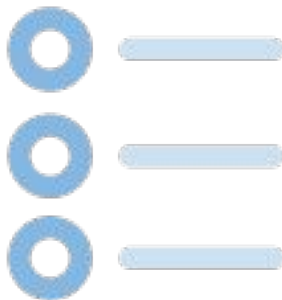


Purpose of this doc

- To guide users of Analytics 360 in understanding how to create Remarketing Lists with a focus on the Insurancemobil industry, while also considering the opportunities available with the DBM integration.
- This document is only intended as a guide and does not replace the knowledge that Insurance websites themselves would have about what remarketing strategies would suit their business the best



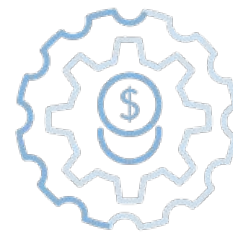
Methodology



- Methodology supporting audience planning between Analytics 360 & DBM in this document are as follows:
 - **Awareness**
 - **Acquisition**
 - **Post Sales**
- Awareness is aimed at raising awareness and visibility of your product, service or cause
- Acquisition is aimed at changing your users from browsers to customers
- Post Sales is aimed at sustaining customer loyalty and engagement

Want to know more?

- The [Analytics 360 Fundamentals](#) training provides a foundation for the core principles of digital analytics, improving business performance through better digital measurement
- For an overview on remarketing lists please see [here](#)
- Additionally please see the following hangouts:
 - [Building Remarketing Lists in GA360](#)
 - [Using GA360 Remarketing Lists in DBM](#)
- To see how to setup Analytics 360 Audiences in DBM, please see [Audience list targeting](#) in the DBM Help Center



For more advanced customisation, please reach out to your Analytics 360 Account Manager and for any specific questions on this document please email Gracia Odon at godon@google.com



What audiences do I need? Planning DBM and Analytics 360 with a Insurance Client



Awareness - Reach on core target audience in DoubleClick Bid Manager



Create any type of audience list in Analytics 360 making it as broad as possible

Assign the Analytics 360 audience list to a DBM line item making sure to exclude it and select 'Similar Audiences' in DBM

Acquisition - Drive increased site conversions with both Analytics 360 & DoubleClick Bid Manager



Create a list of users who spent time looking at home insurance but didn't start filling in the quote form

Retarget this list by assigning it to a line item in DBM, reaffirming the benefits of the home insurance policy into the creative with the aim of encouraging the user to request a quote



Create a list of users who abandoned a request for a home insurance quote

Retarget this list by assigning it to a line item in DBM, including perhaps a limited time only promotional offer into the creative with the aim of encouraging the user to complete the quote request

After-Sales - Ensure you maintain customer engagement post sales with both Analytics 360 & DoubleClick Bid Manager



Create a list of users who have requested a home insurance policy and who now have shown interest in income and Mortgage insurance

Exclude this list from home insurance awareness strategies in DBM. Retarget this list by re-engaging the user with the benefits of purchasing an additional insurance policy in the creative with the aim of these users also requesting a quote for income and/or home insurance



Create a list of users who are up for renewal of their yearly home insurance policy purchased a year ago

Retarget this list of users with a reminder to renew their home insurance in the creative with the aim of these users staying loyal to your brand



Acquiring 'Visitors who have shown interest in home insurance'



[Bain & Company](#)'s new survey of 164,421 consumers in 19 countries, shows that loyalty remains tough for many insurers to come by. One structural reason is that insurers have far fewer interactions with customers than, say, retail banks. In some markets, interactions are even dwindling with the rise of online aggregators (also known as comparison sites). Being in touch more frequently with consumers contributes to loyalty.

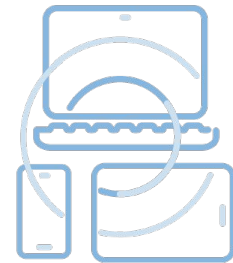


Create a list of users who spent time looking at home insurance but didn't start filling in the quote form

Retarget this list by assigning it to a line item in DBM, reaffirming the benefits of the home insurance policy into the creative with the aim of encouraging the user to request a quote

List Setup

- Using the Condition rule in Analytics 360 to set a condition on the type of user you want to add into your remarketing bucket
 - 'Page Title', 'contains' 'Home_Insurance'
 - AND
 - 'Time on Screen', 'per session', '≥', '300'
 - AND
 - 'Event Action', 'does not contain', 'Home_Insurance_Step1'



Audience Builder ✕

<p>Demographics</p> <p>Technology</p> <p>Behavior</p> <p>Date of First Session</p> <p>Traffic Sources</p> <p>Enhanced Ecommerce</p> <p>Advanced</p> <p>Conditions 1</p> <p>Sequences</p>	<p>Conditions</p> <p>Segment your users and/or their sessions according to single or multi-session conditions.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Filter Users ▾ Include ▾ ✕</p> <p>Page Title ▾ contains ▾ Home_Insurance - OR AND</p> <p>AND</p> <p>Time on Screen ▾ per session ▾ ≥ ▾ 300 - OR AND</p> <p>AND</p> <p>Event Action ▾ does not contain ▾ Home_Insurance_Step1 - OR AND</p> <p style="text-align: right;">+ Add Filter</p> </div>	<p>Conditions ✕</p> <p>Page Title: contains 'Home_Insurance'</p> <p>Time on Screen ≥ 300</p> <p>Event Action: not contain 'Home_Insurance_Step1'</p>
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Apply Cancel

- Tip:** The Time on screen is counted in minutes. So to capture users who have spent 5 minutes on your site, this would equate to 300 minutes which is what you would state as a metric here instead of 5 minutes



Acquiring 'Users who abandoned a home insurance quote'



There are many reasons why users do not purchase from a insurance site straight away, 'Price', 'Timing' etc. Ensuring you have a plan to retarget your content to them opens up another opportunity to develop users into customers.

The turning point between browser and customer can at times be microscopic. Capturing these micro interactions of user behavior in Analytics 360 gives you the ability to develop a pool of customers who are right on the edge of buying decisions.

You can finalising your audience strategy by tailoring the DBM creative to include customised creative linked to your analytics 360 remarketing list, completing the cycle of an efficient remarketing strategy which allows you to compete fully on audience behaviour by supporting potential customers on their journey of making an insurance purchase.

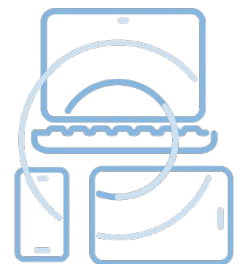


Create a list of users who abandoned a request for a home insurance quote

Retarget this list by assigning it to a line item in DBM, including perhaps a limited time only promotional offer into the creative with the aim of encouraging the user to complete the quote request

List Setup

- Using the Conditions rule in Analytics 360 means you can include two specific requirements of your user behaviour
 - 'Event Action', 'contains', 'Home_Insurance_step1'
 - AND
 - 'Event Action', 'does not contain', 'Home_Insurance_form_completion'



Audience Builder ✕

<p>Demographics</p> <p>Technology</p> <p>Behavior</p> <p>Date of First Session</p> <p>Traffic Sources</p> <p>Enhanced Ecommerce</p> <p>Advanced</p> <p>Conditions 1</p> <p>Sequences</p>	<p>Conditions</p> <p>Segment your users and/or their sessions according to single or multi-session conditions.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Filter Users ▾ Include ▾ ✕</p> <p>Event Action ▾ contains ▾ Home_Insurance_step1 - OR AND</p> <p>AND</p> <p>Event Action ▾ does not contain ▾ Home_Insurance_form_completion - OR AND</p> <p style="text-align: right;">+ Add Filter</p> </div>	<p>Conditions ✕</p> <p>Event Action: contains "Home_Insurance_step1"</p> <p>Event Action: not contain "Home_Insurance_form_completion"</p>
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Apply Cancel

- Tip:** You can create this Conditions rule with both the use of 'AND' or 'Add Step' . In this rule the filtering of 'Users' and 'Include' is the same for both parts of this rule so we don't need to use the 'Add Step'. However if you wanted to create a rule to exclude 'sessions' instead of users for instance, you could do this by using the 'Add filter option'.



Ensure you maintain customer engagement Post Sales



Shopify.com states that, 'Customer profitability rates tend to increase over the life of a retained customer and a two percent increase in customer retention has the same effect on profits as cutting costs by ten percent'.

This shows how it's cost effective to get sales from previous customers rather than allocate additional spend on winning new customers. Consider the following post sales remarketing list suggestions to guide you to what lists might be suitable for your own website.

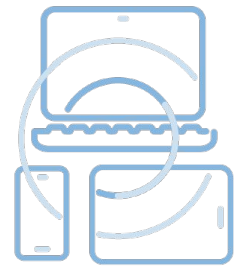


Create a list of users who have requested a home insurance policy and who now have shown interest in income and Mortgage insurance

Exclude this list from home insurance awareness strategies in DBM. Retarget this list by re-engaging the user with the benefits of purchasing an additional insurance policy in the creative with the aim of these users also requesting a quote for income and/or home insurance

List Setup

- Using the Conditions Rule in Analytics 360 means you can easily segment a user who has already enquired about one brand of insurance' and who is now interested in another.
 - 'Page Title', 'contains', 'Mortgage_Insurance'
 - AND
 - 'Page Title', 'contains', 'Income_Insurance'
 - AND
 - 'Event Action', 'contains', 'Home_Insurance_form_completion'



Audience Builder ✕

<p>Demographics</p> <p>Technology</p> <p>Behavior</p> <p>Date of First Session</p> <p>Traffic Sources</p> <p>Enhanced Ecommerce</p> <p>Advanced</p> <p>Conditions 1</p> <p>Sequences</p>	<p>Conditions</p> <p>Segment your users and/or their sessions according to single or multi-session conditions.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Filter Users ▾ Include ▾ ✕</p> <p>Page Title ▾ contains ▾ Mortgage_Insurance - OR AND</p> <p>AND</p> <p>Page Title ▾ contains ▾ Income_Insurance - OR AND</p> <p>AND</p> <p>Event Action ▾ contains ▾ Home_Insurance_form_completion - OR AND</p> <p style="text-align: right;">+ Add Filter</p> </div>	<p>Conditions ✕</p> <p>Page Title: contains 'Mortgage_Insurance'</p> <p>Page Title: contains 'Income_Insurance'</p> <p>Event Action: contains 'Home_Insurance_form_completion'</p>
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[Apply](#) [Cancel](#)



Ensure you maintain customer engagement Post Sales



Analytics 360 Customers who have a capacious CRM database can utilise the below [three options](#) to creatively design remarketing strategies uniquely specific to their way of business.

- Custom Dimensions
- Measurement Protocol
- Data Import.

For Insurance Clients, being able to CRM Data like the purchase date of a specific insurance policy into Analytics 360 enables to reach out to customers in a much more organised way by targeting them in advance of their renewal date.



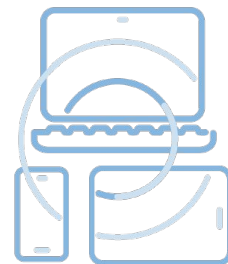
Create a list of users who are up for renewal of their yearly home insurance policy purchased a year ago



Retarget this list of users by assigning it to a line item in DBM, with a reminder to renew their home insurance in the creative with the aim of these users staying loyal to your brand

List Setup

- Using the Conditions Rule in Analytics 360 along with having previously setup CRM data means you can easily segment a user who has 'Purchased a specific Insurance Item and then target them within a year of their purchase using a setup along the lines of the following:
 - 'CRM Data: Bought Home Insurance?', 'exactly matches', 'Yes' AND
 - 'CRM Data: Date of Home Insurance?', 'exactly matches', 'March_2016'



The screenshot shows the 'Audience Builder' interface. On the left is a sidebar with categories: Demographics, Technology, Behavior, Date of First Session, Traffic Sources, Enhanced Ecommerce, Advanced (highlighted), Conditions (with a '1' icon), and Sequences. The main area is titled 'Conditions' and contains the instruction 'Segment your users and/or their sessions according to single or multi-session conditions.' Below this, there is a 'Filter' section with 'Users' selected and 'Include' as the action. Two conditions are listed: 'CRM Data: Bought Home Insurance?' with 'exactly matches' and 'Yes', and 'CRM Data: Date of Home Insurance?' with 'exactly matches' and 'March_2016'. The conditions are connected by an 'AND' operator. There are also 'OR' and 'AND' buttons between the conditions. At the bottom, there is an '+ Add Filter' button and 'Apply' and 'Cancel' buttons.