



# Search's role in the media mix

Paul Sinkinson

# Analytic Partners: who we are



## Independent

Privately-held, no investors to satisfy  
Unbiased perspective on measuring performance

## Long-term, partnership view

Strong balance sheet with 90% client retention  
Global marketing analytics network

## Strong legacy, founded in 2000

20 years of experience in delivering outstanding returns  
12 global offices

## Solely focused on enabling analytic adoption

To unlock potential through full-service consultancy  
Average 30% improvement in ROI

## FORRESTER®

- ▶ **The Top Leader in the Forrester Wave: Marketing Measurement and Optimization Q1 2020**
- ▶ **Only Leader in Forrester Wave: Marketing Measurement and Optimization, Asia Pacific Q4 2018**

## Gartner®

- ▶ **Recognized for Marketing Mix & Attribution in Market Guide**
- ▶ **Recognized for Building Segments & Personas for Digital Marketing**

## *i-com*

- ▶ **Smart Data Agency of the Year 2017 & 2019** for leveraging value from data to help clients achieve competitive advantage
- ▶ **Winner of Intel Challenge Hackathon 2017 & 2019**



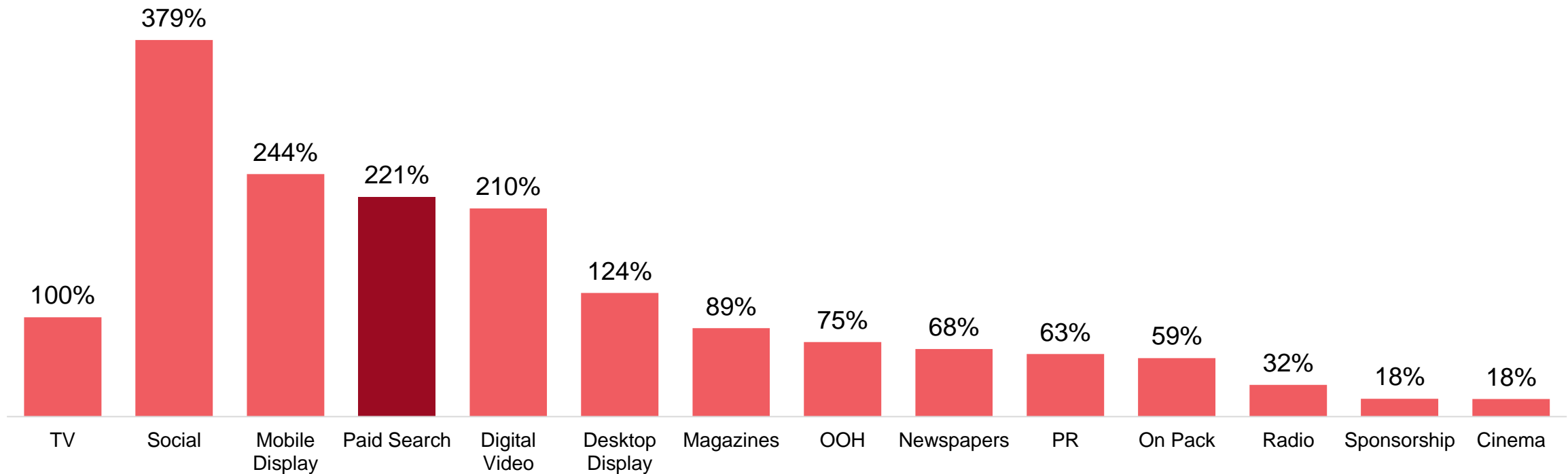
ROI GENOME

- ▶ Hundreds of billions in marketing spend measured
- ▶ More than 2 million marketing metrics
- ▶ Global footprint covering 45+ countries
- ▶ 700+ brands and over \$470 billion spend
- ▶ Cross-section of industries and marketing tactics
- ▶ In depth understanding of how marketing works
  - Halo principles
  - Synergies and cascading impacts
  - Modelling considerations

# Search can be a relatively strong performer

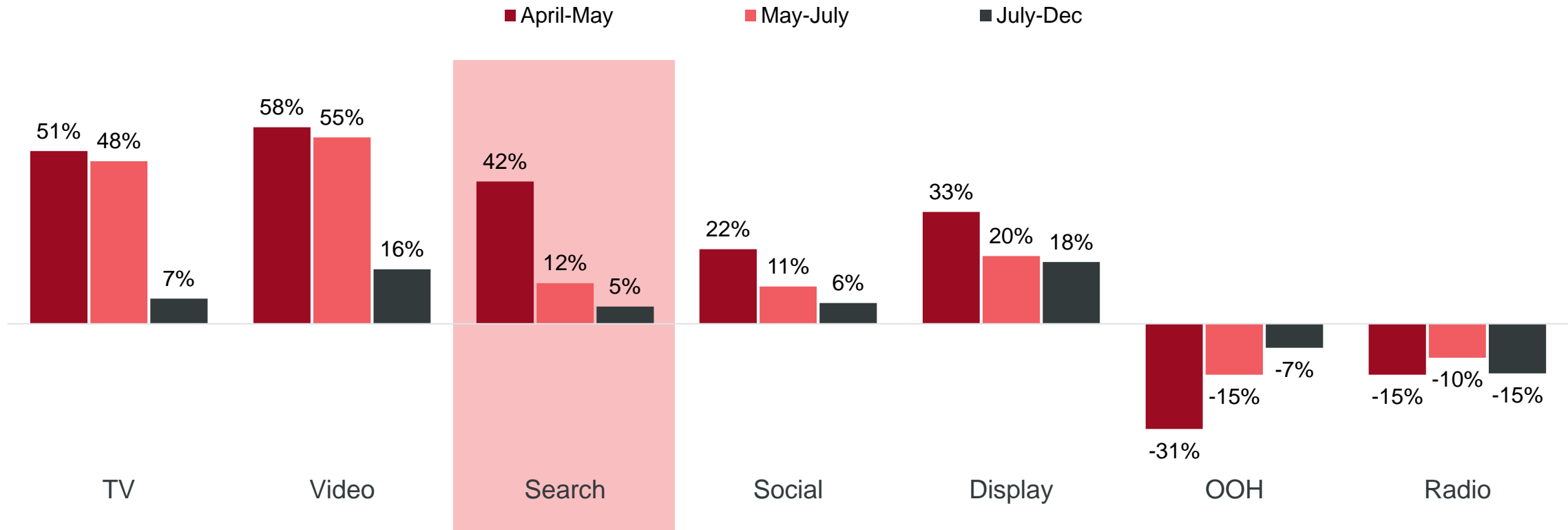


Analytic Partners average short-term ROI performance across channels benchmarked to TV - Australia



# Search ROIs lifted through 2020 but we saw a return to normality at the back end of the year

Media ROI benchmarked to pre-pandemic



# Search is stronger for higher involvement categories

Highly researched products deliver higher Search ROIs – and people are taking the time to research right now

Limited researched product

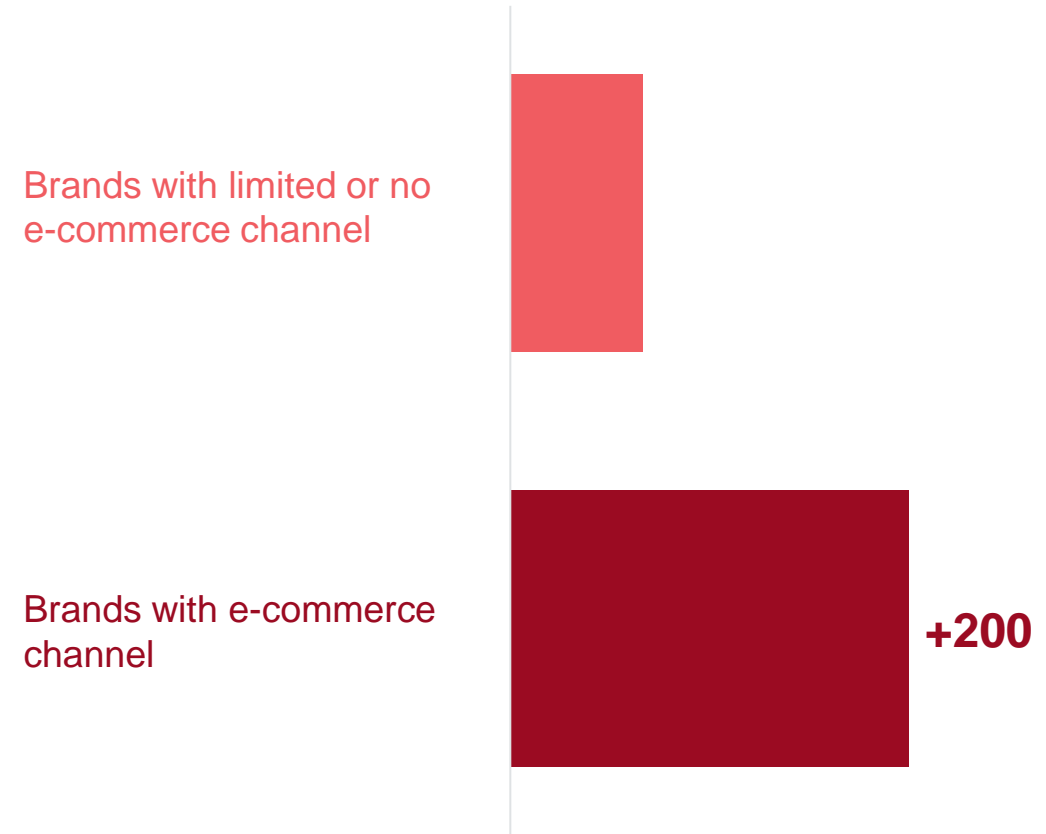
Examples:  
low cost household products

Highly researched product

Examples:  
organic focused products, products with medically focused nutritional benefits

# But the game changer for search is dedicated online fulfilment

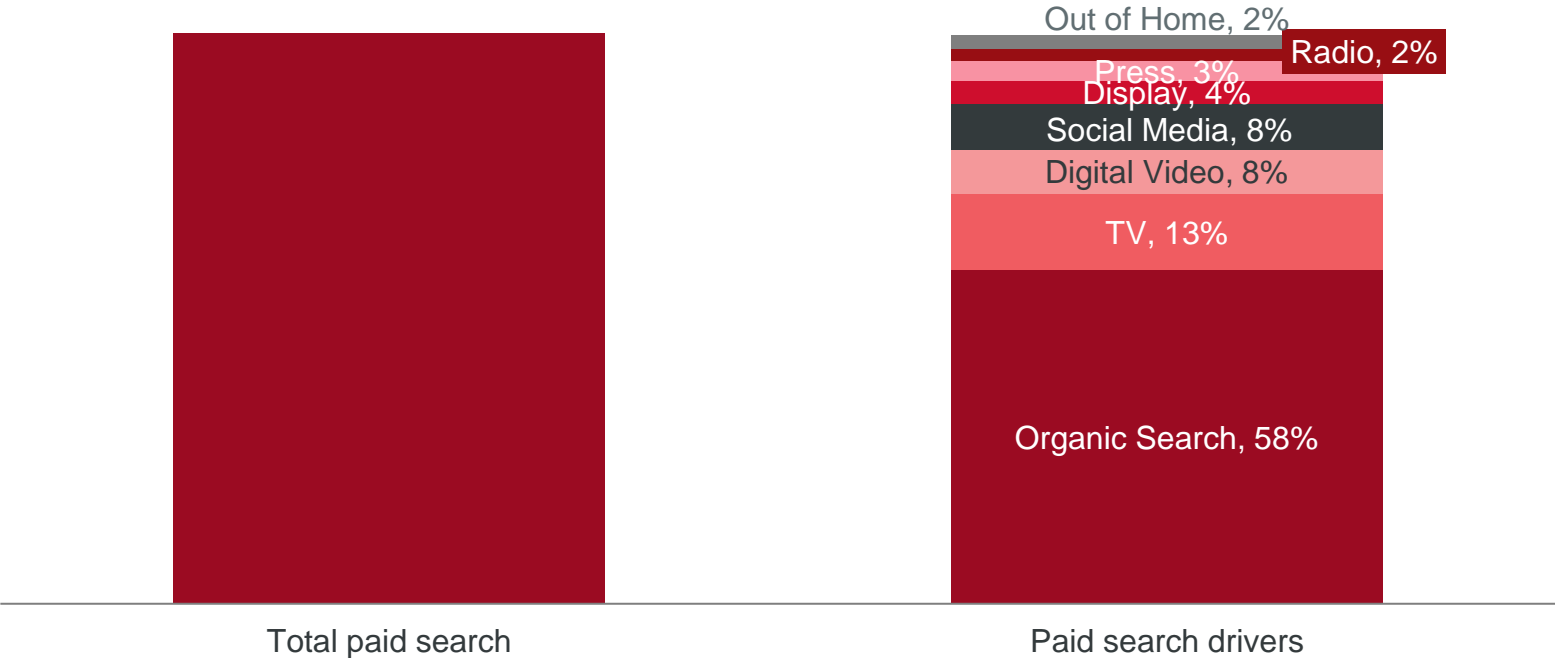
The returns of Search more than double by shifting to online fulfilment



# A large portion of paid search volume can be driven by other media channels



Drivers of paid search activity





# This speaks to an opportunity: We know a single channel strategy leaves money on the table



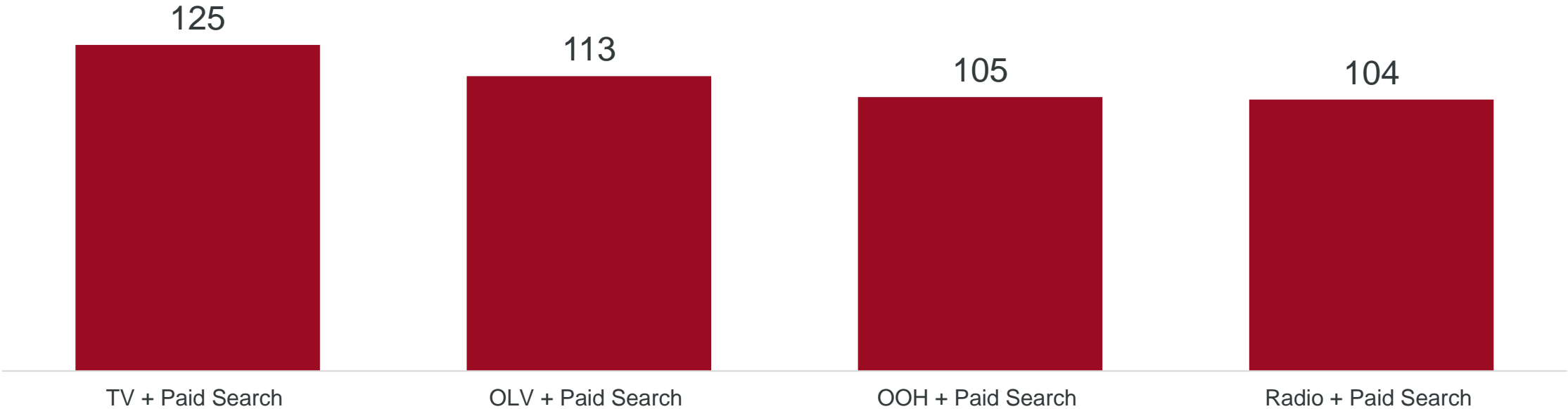
ROI Genome™: Single channel strategy vs combined



# Synergy is key to maximising search activity



Analytic Partners average Search synergy incremental ROI multiplier - Australia



Note: TV = 100. All channels are benchmarked against TV at 100

# Key take outs

**01.**

Search works better for brands with e-comm facilities and for higher involvement categories


**02.**

Search performance is heavily driven by other media channels

**03.**

Synergy is key to maximising search





**Adapt with a Leader**  
You can thrive in even the most challenging times, if you know how to adapt

**FORRESTER®**

**WAVE  
LEADER 2020**

Marketing  
Measurement And  
Optimization Solutions