

**driving
omnichannel
success for
commerce
& discussion**



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Driving Omnichannel Success for Commerce

Analytic Partners: an overview



Independent

Privately-held

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

17 global offices

Solely focused on enabling analytic adoption

To unlock potential through full-service consultancy

Average 30% improvement in ROI

FORRESTER®

- ▶ **Only Global Leader for every wave since 2016:** Marketing Measurement and Optimization 2016 2018, 2020, 2022
- ▶ **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
- ▶ **Entered Hackathon twice, won twice (2017 & 2019)**

Wisdom from knowledge

100s of billions in spend measured

Millions of marketing metrics

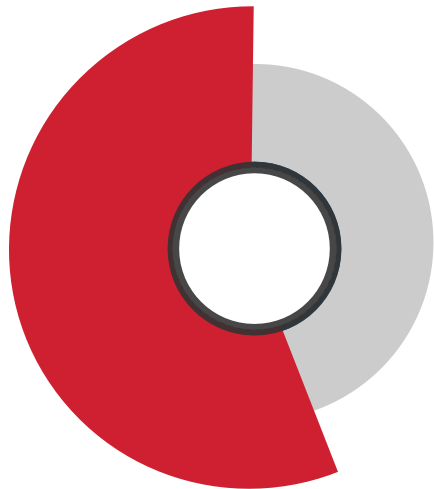
Over 50 countries, cross industries

Over 20 years across 1000+ brands

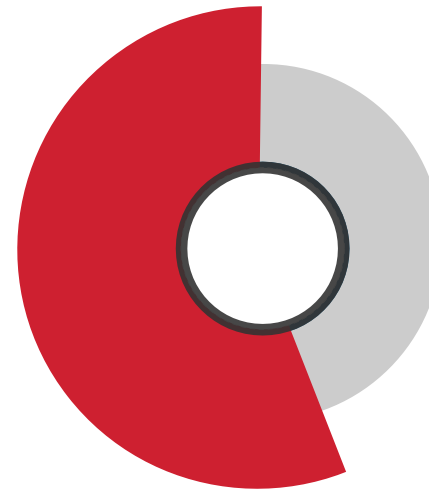


In shocking news: you need to spend

Tough times don't mean media can't work - in the last recession brands that held the line benefitted



63%
saw stronger ROI

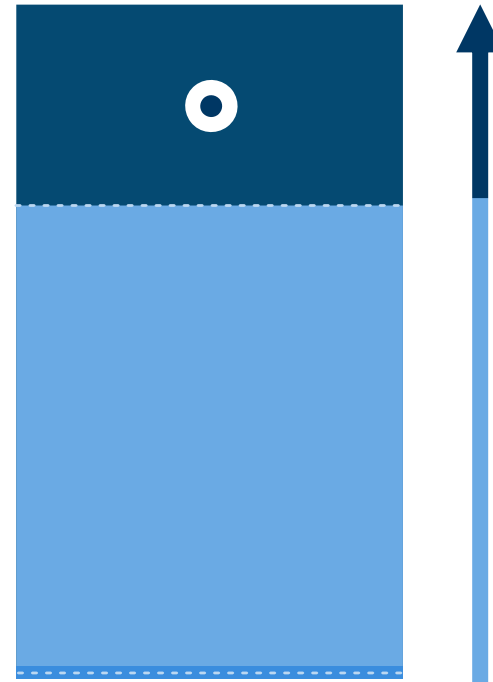


60%
ROI grew YOY

There's a real benefit to adapting your distribution to match this new demand

Higher levels of physical or digital presence can lead to

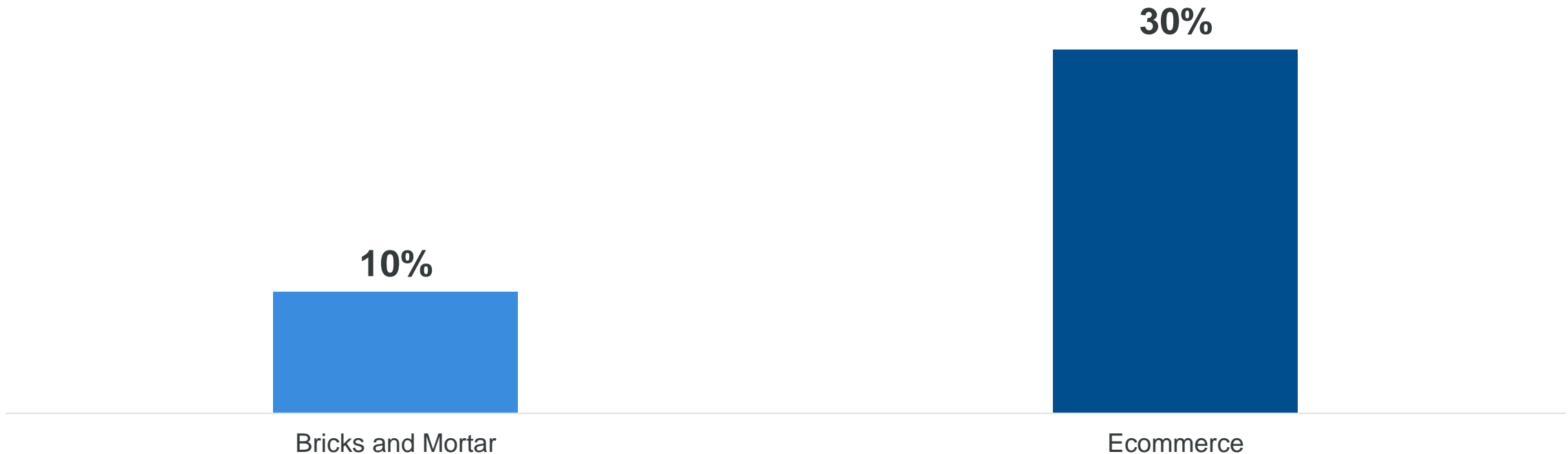
32%
HIGHER
RETURNS



Media is 3x more important for driving Ecommerce revenue than it is for driving bricks & mortar



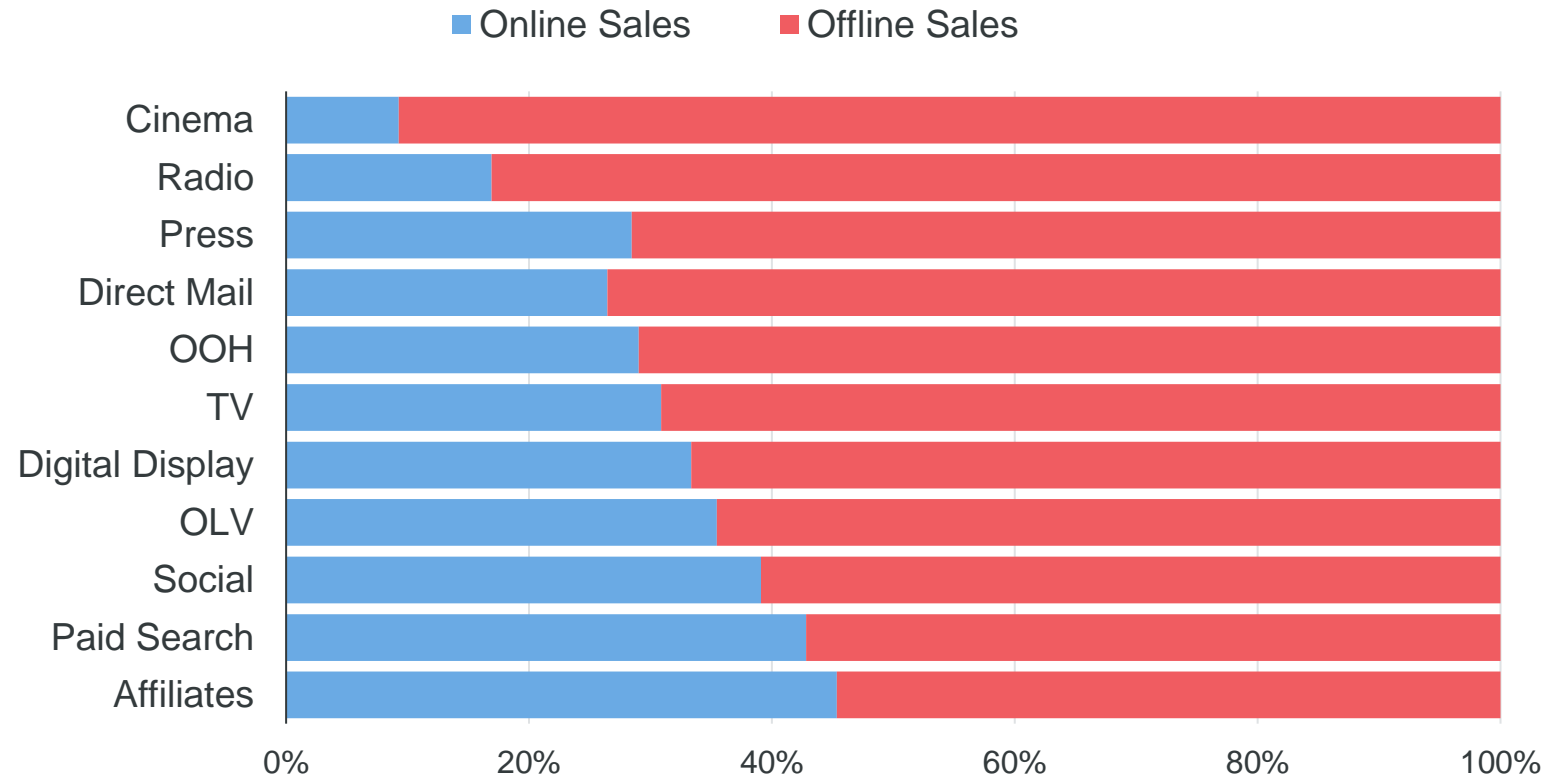
Media share of revenue



This doesn't mean just online spend though

All media has omnichannel impact

Average sales impact by marketing channel



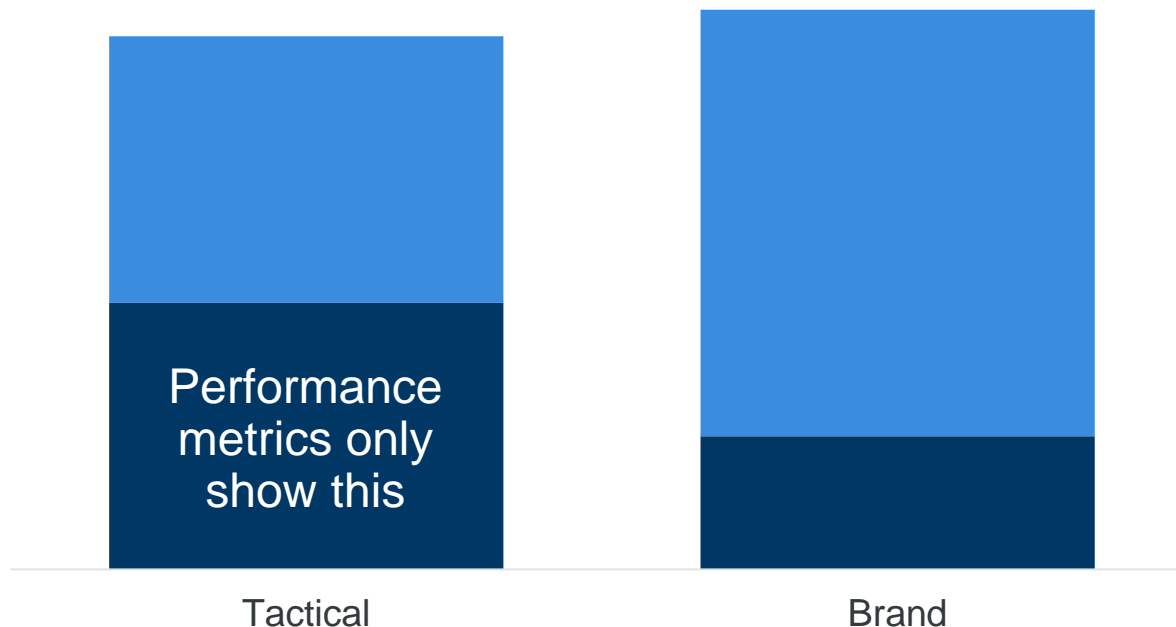
Brand, Creative and the impact of measurement

Siloed views of media can hide the larger impact of media - particularly for brand



Short Term Business Impacts: Illustrative Example

■ Immediate impact only ■ Weeks 2-4 & Halo



ROI Genome: Advertising Facts

2/3 Of the impact happens after the week it's aired

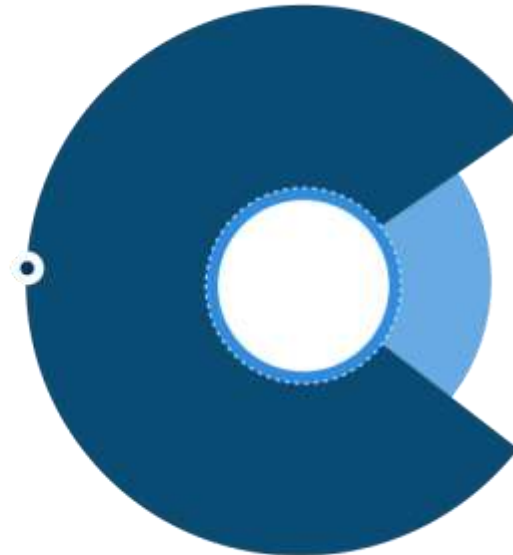
50% Of the impact is Halo onto the rest of the portfolio

Brand messaging is the safer bet for better returns in an omnichannel world

A holistic measure of brand messaging shows the true value

**Brand messaging
outperforms
performance
messaging**

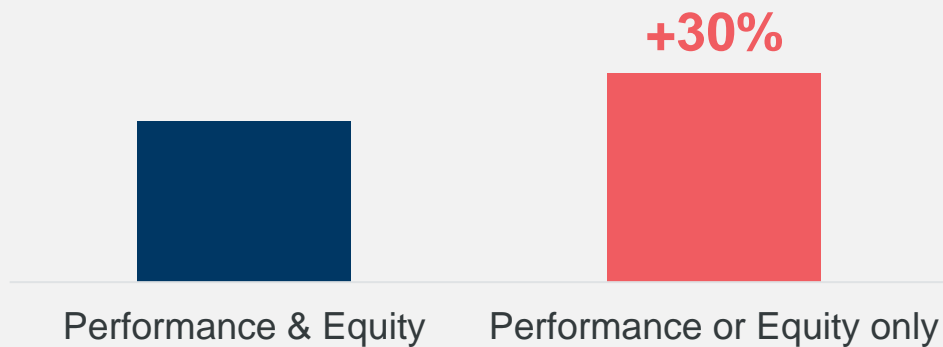
80%
OF THE
TIME



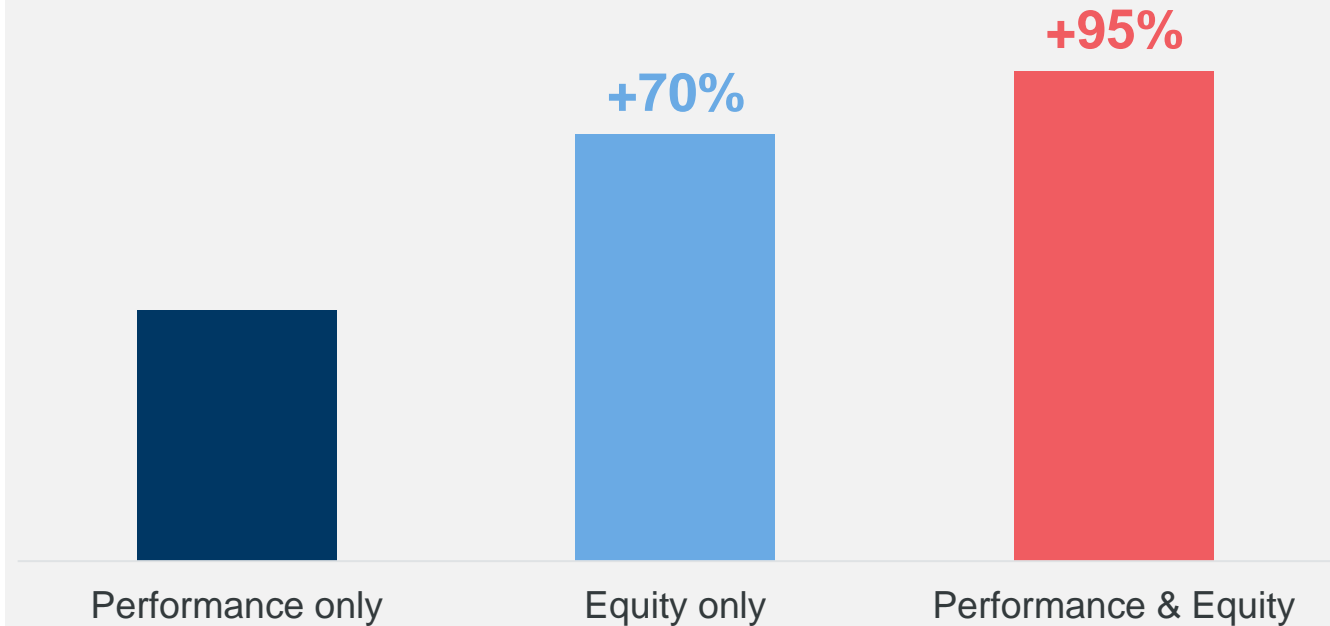
**Brands with the
highest ROIs have at
least 30% share of
brand spend**

Don't do 100% spend on brand though - and don't try creative that does it all in one piece

Total Media ROI for one creative in one channel

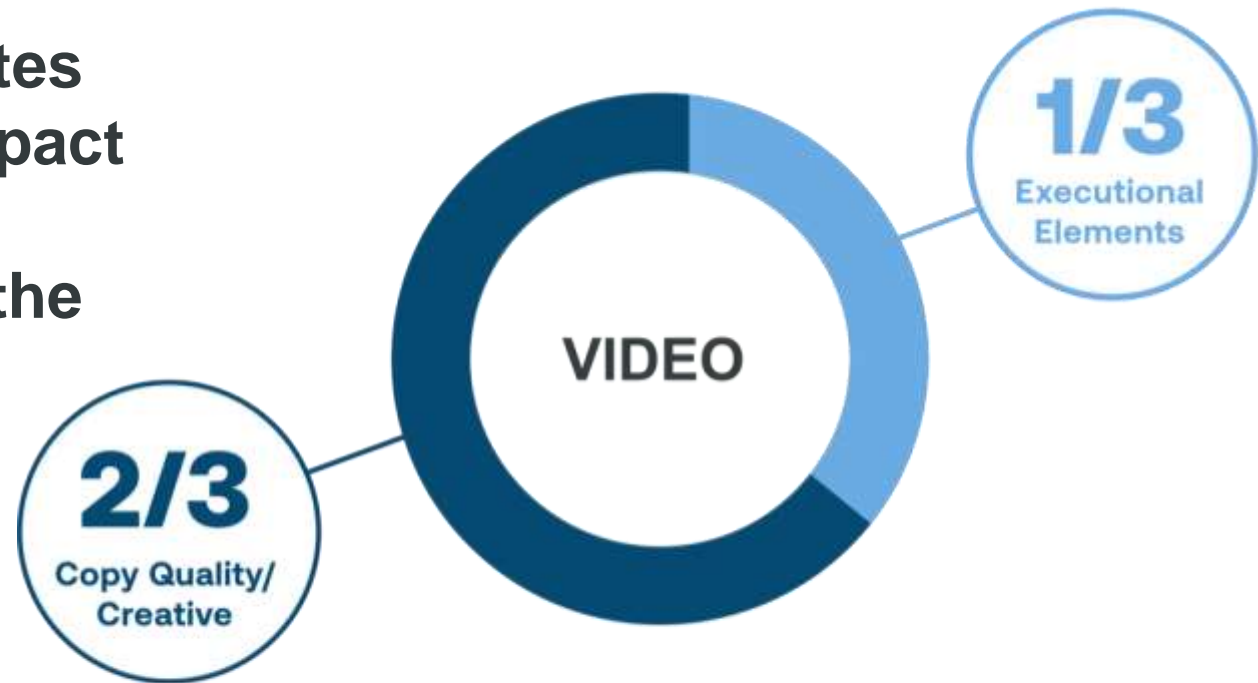


Total Media ROI for a campaign (i.e. multiple creatives and channels)



The quality of your creative is vitally important for all marketing, but particularly for omni

Our ROI Genome indicates that two thirds of the impact of a video impression is driven by the quality of the creative itself



We're still not there with online creative - we need more testing and experimenting

Advertising efficiency ranges: Online vs TV

ROI Ranges



TV



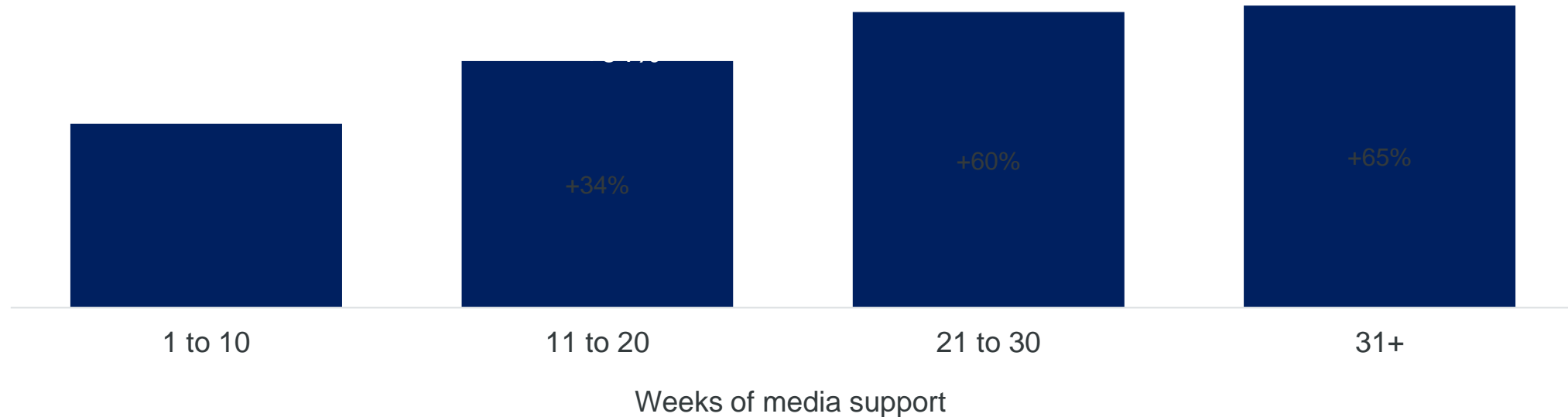
Online

Pick your battles though, as consistency of media support is also vital for ROI success



Consistent support throughout means you're not doing the heavy lifting of setting up a campaign all the time

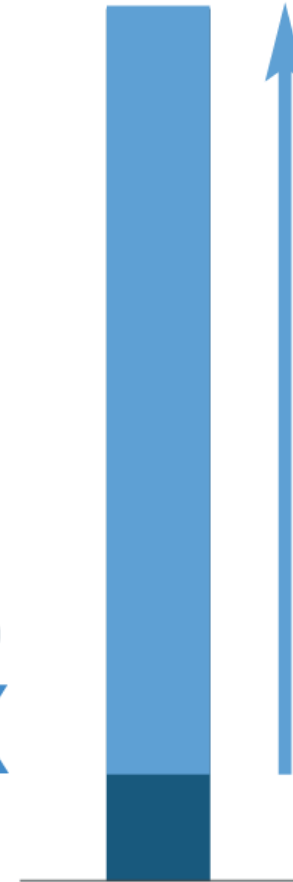
Median ROI by consistency of annual media support



Leveraging halo is another key to success - make your marketing work harder

Our ROI Genome shows halo typically contributes half of the impact of marketing but when effectively executed, halo can increase an ROI by

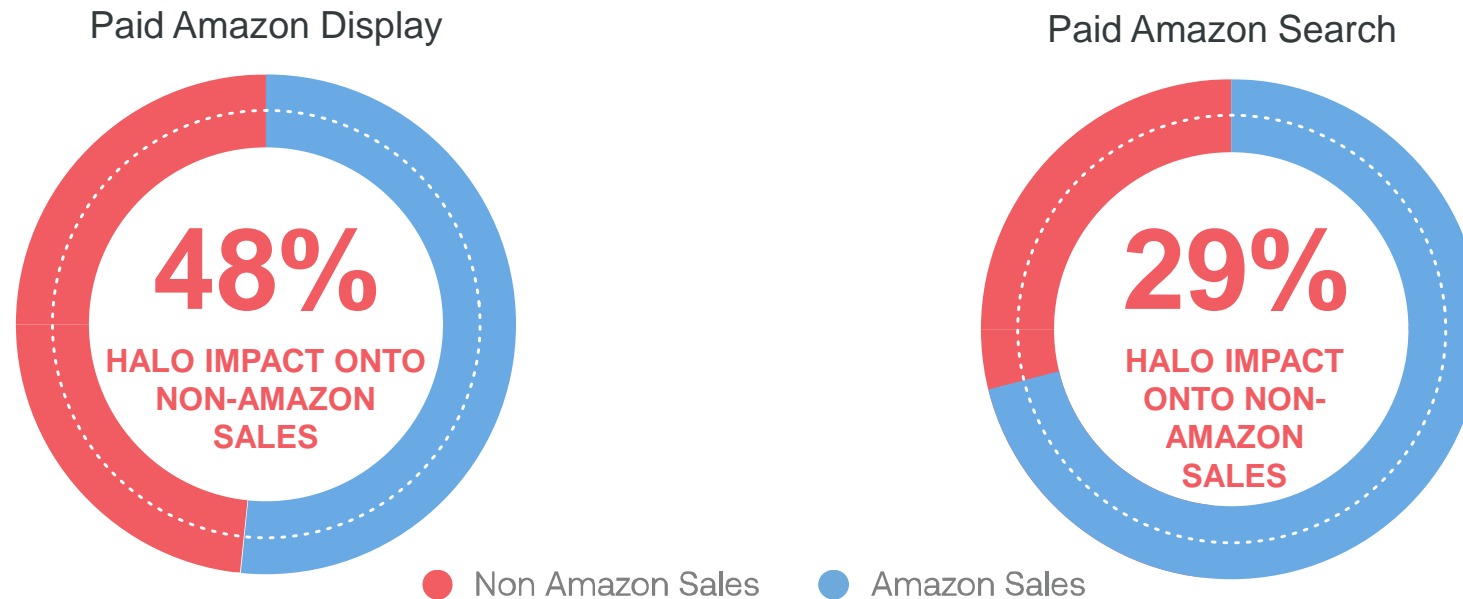
UP TO
10X



Amazon shows how understanding halo is key, and is a possible view to the future for Australia

Amazon advertising has a 20% higher ROI than a brand's average- because of strong halo, possibly in part to it being used as a comparison site

Impact of Amazon marketing efforts



A true omnichannel approach to marketing delivers far more than multichannel

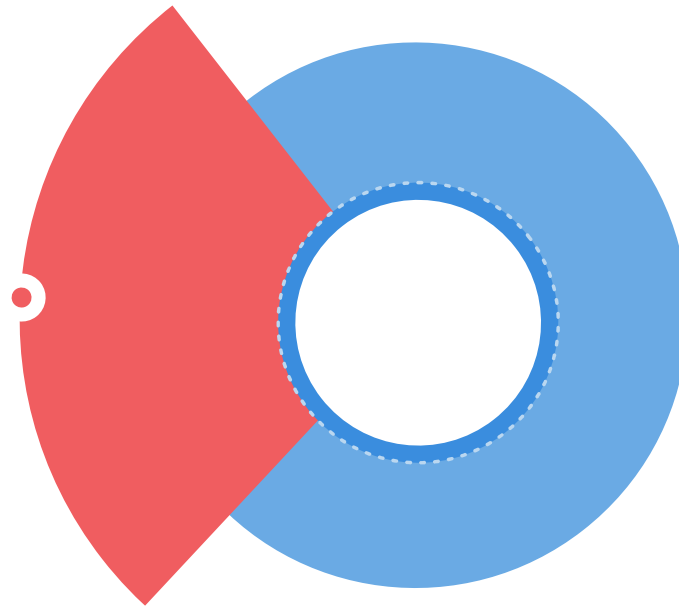


Brands with and without eCommerce support

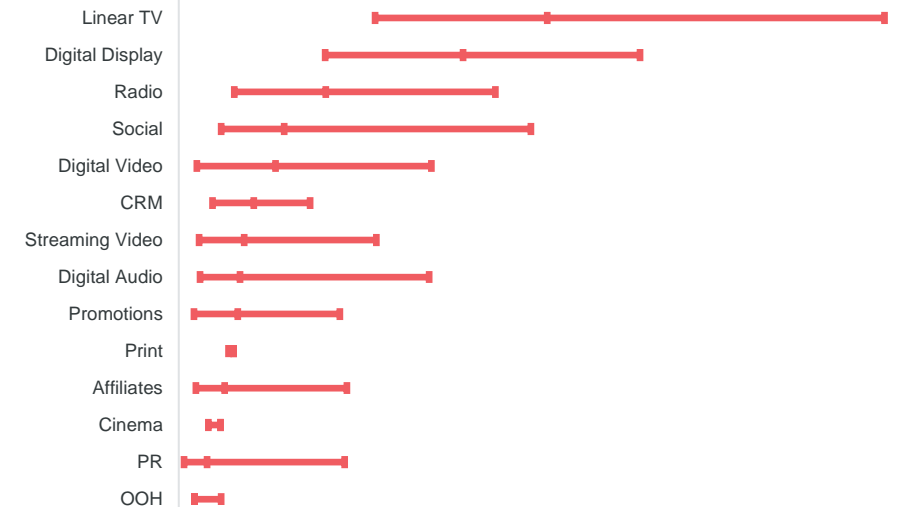


Measuring in silos can mean you miss the real impact - but also the opportunity

30% of search
clicks are due to
other marketing
activities

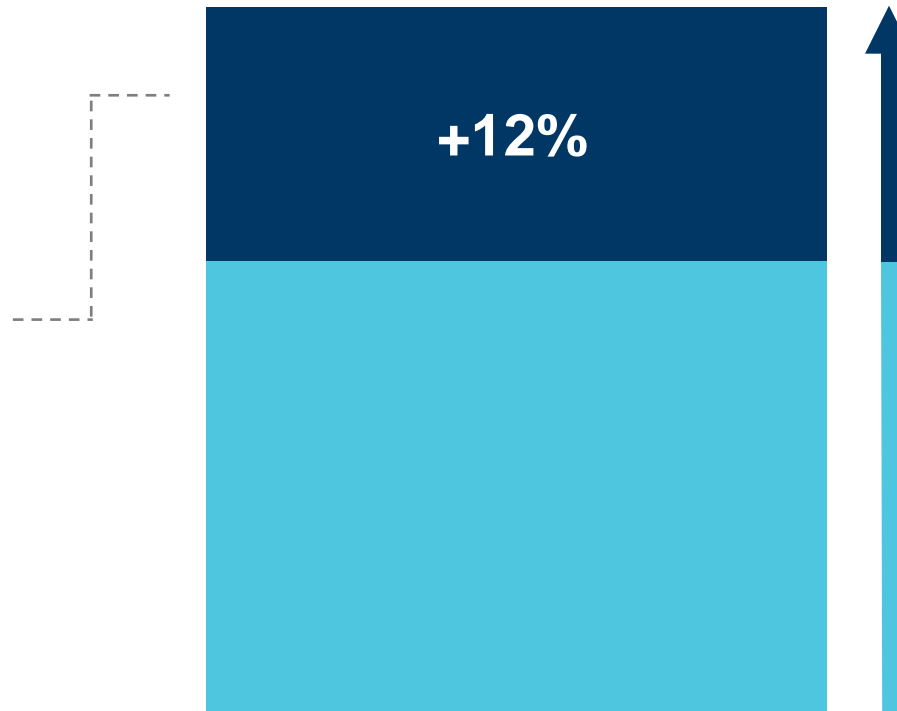


Drivers of clicks %



There's synergy with search and other media - and the real role of search shows why

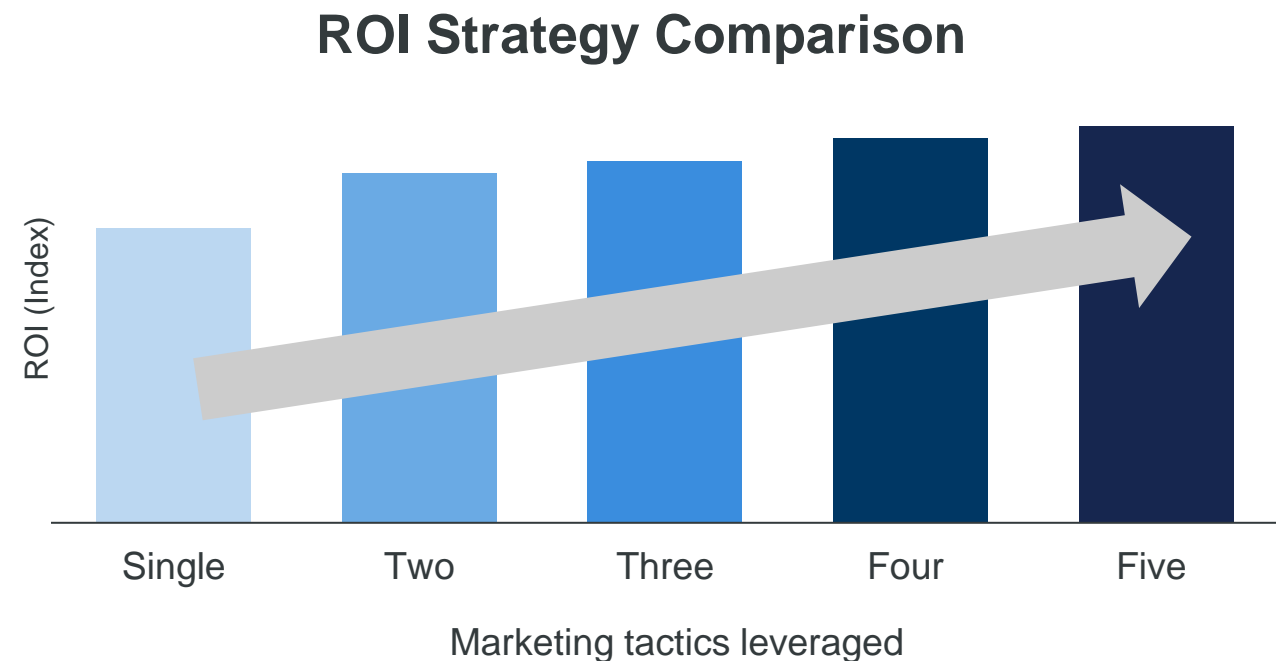
**In Australia we see a
12% increase in ROI
from the synergy of
Search and Google
Display ads**



Synergy is a vital ingredient to omnichannel success

Multimedia campaigns tend to have a higher ROI than single media campaigns

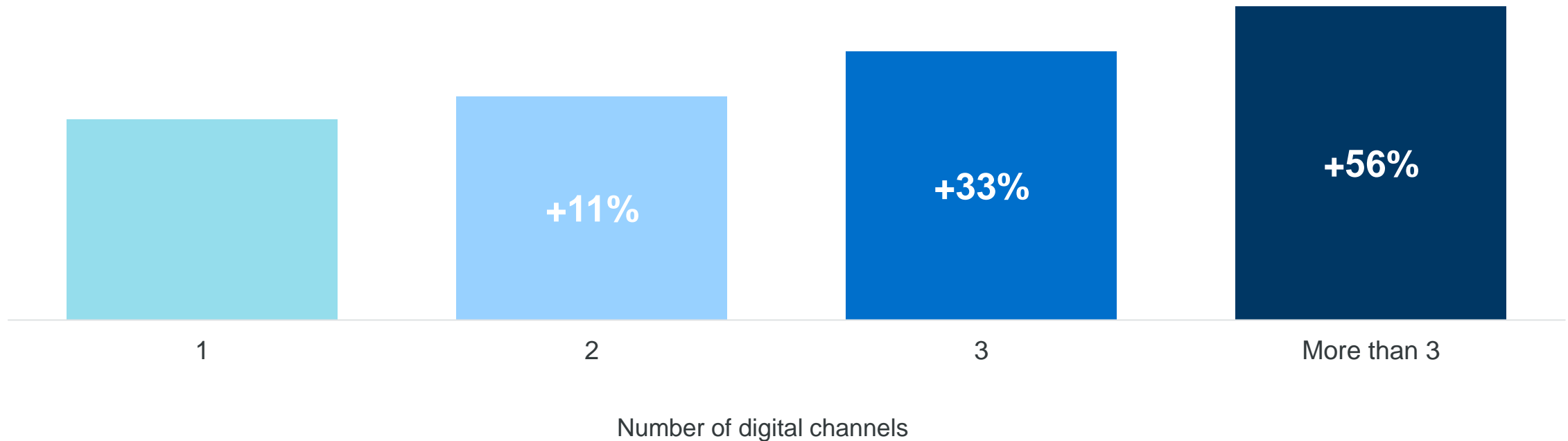
Our ROI Genome shows that there is a strong case to be made for a combined multi-channel approach to drive campaign effectiveness



Even within digital, more channels drives stronger results



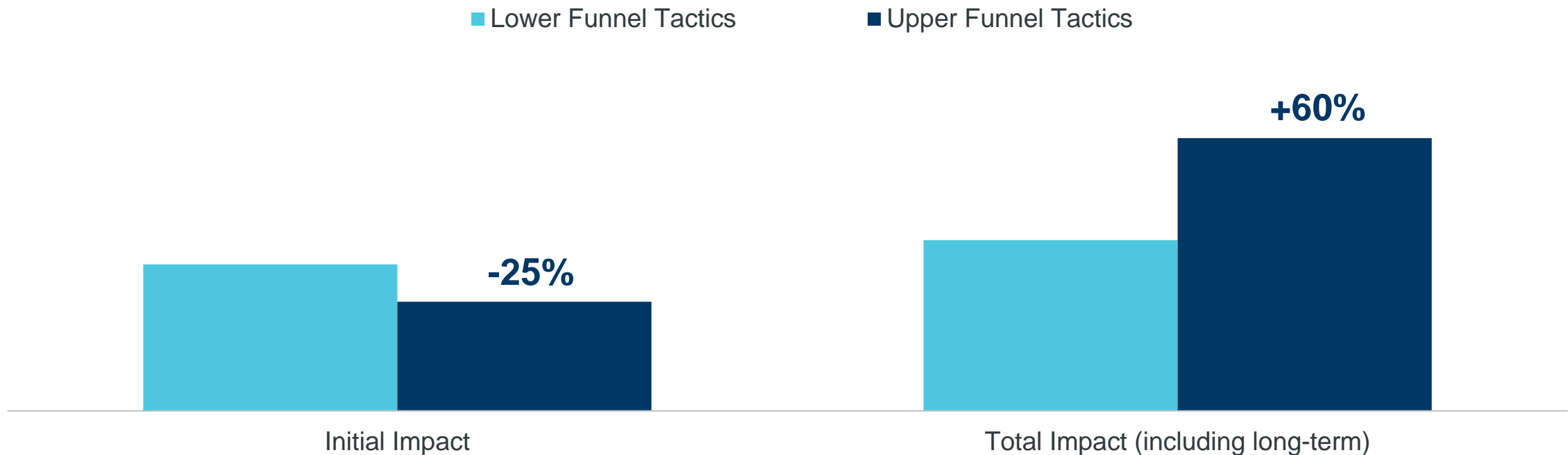
ROI by number of digital media channels executed



Don't forget to look at the long term, even when short term results look great

Overinvesting in lower funnel leads to higher ST ROI, but lower LT ROI

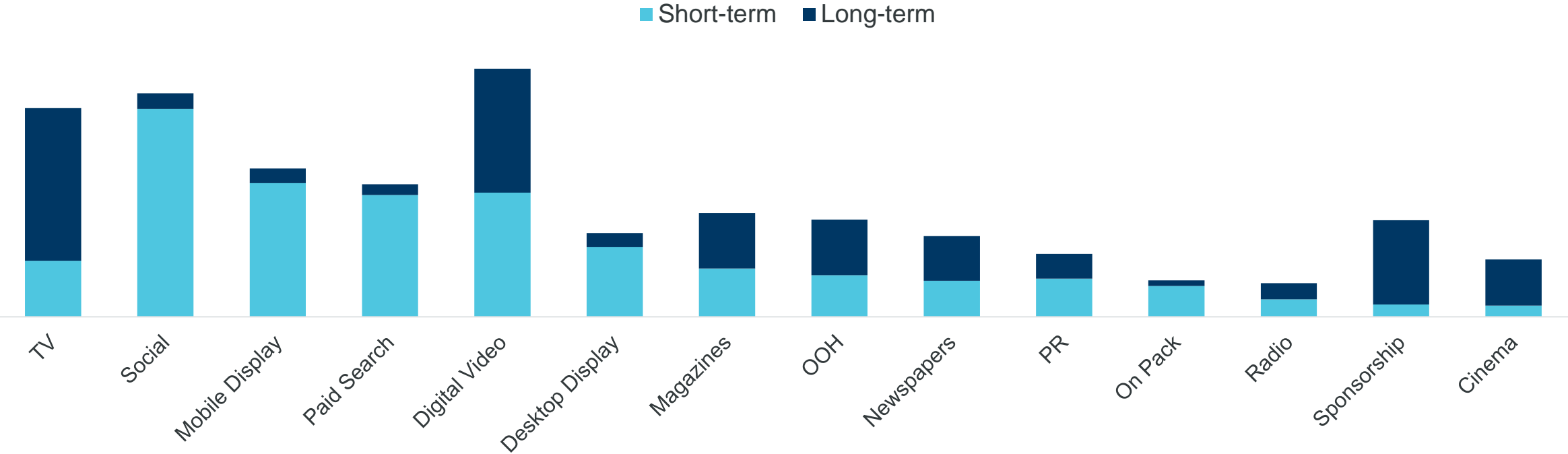
Marketing strategy efficiency and business impact



By leveraging the short term and long term strength of channels you drive success

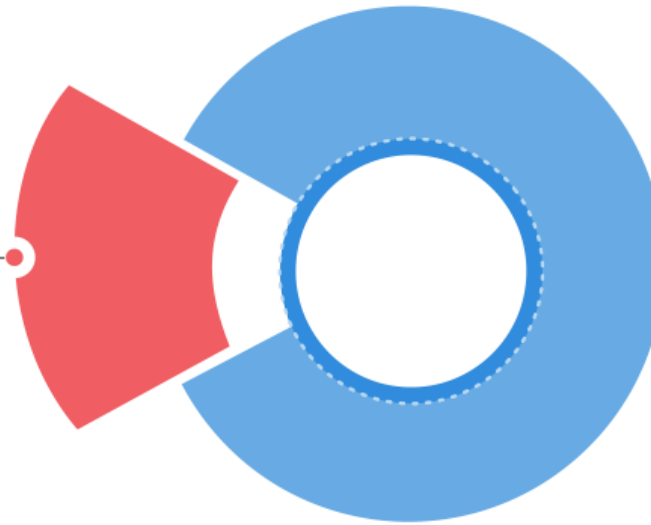


Total: Average long-term ROI impact across channels benchmarked to TV - Australia



Don't react - adapt and monitor competitive spend

An average brand
could lose almost
15%
of its business



if a similar sized
competitor doubles its
marketing investments-
even if it's relative

Key take outs



01 There's growth available - but you have to spend to get it

02 Ecommerce sales are more dependent on media activity, so focus here as it's also the fastest growing area

03 All media has an omnichannel impact so it's not just a focus on online media that will win the day

04 Holistic measurement shows that brand campaigns will drive the biggest win - but don't do just brand

05 Understand the halo and the synergy your activity offers

06 The higher performing media channels are now even higher performing from a total ROI perspective - TV, online video, social and search