marginmedia

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Digital Marketing Report

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2015

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01

MEDIA CONSUMPTION TRENDS & ADVERTISING BUDGETS

HOW DO WE CONSUME OUR MEDIA?

Australians are consuming media through a variety of platforms and digital consumption is continuing to rise. Research conducted by Deloitte indicates that watching TV and using the internet socially are tied for first preference for entertainment consumption for Australians, an increase from 2014 for internet and a decrease for television.

More than ever, Australians are consuming digital content through mobile devices such as smartphones and tablets. Australians consume their media through multiple different technologies, often through two technologies at the same time, with over 46% of Australians often using their phone while watching television. In terms of ownership, 81% of Australians own a smartphone, 82% own a laptop, and 62% own a tablet. Smartphone and tablet ownership remained similar to last year while laptop and desktop ownership dropped.

The internet continues to be a substantial part of daily life for Australians with 79% of Australians accessing it daily and 52% accessing it more than five times a day.

We primarily consume our social media through mobile devices and through apps rather than websites. 70% of social media access occurs on a smartphone, 75% through apps and 14% through the website. (Sensis, 2015)

ENTERTAINMENT MEDIA CONSUMPTION
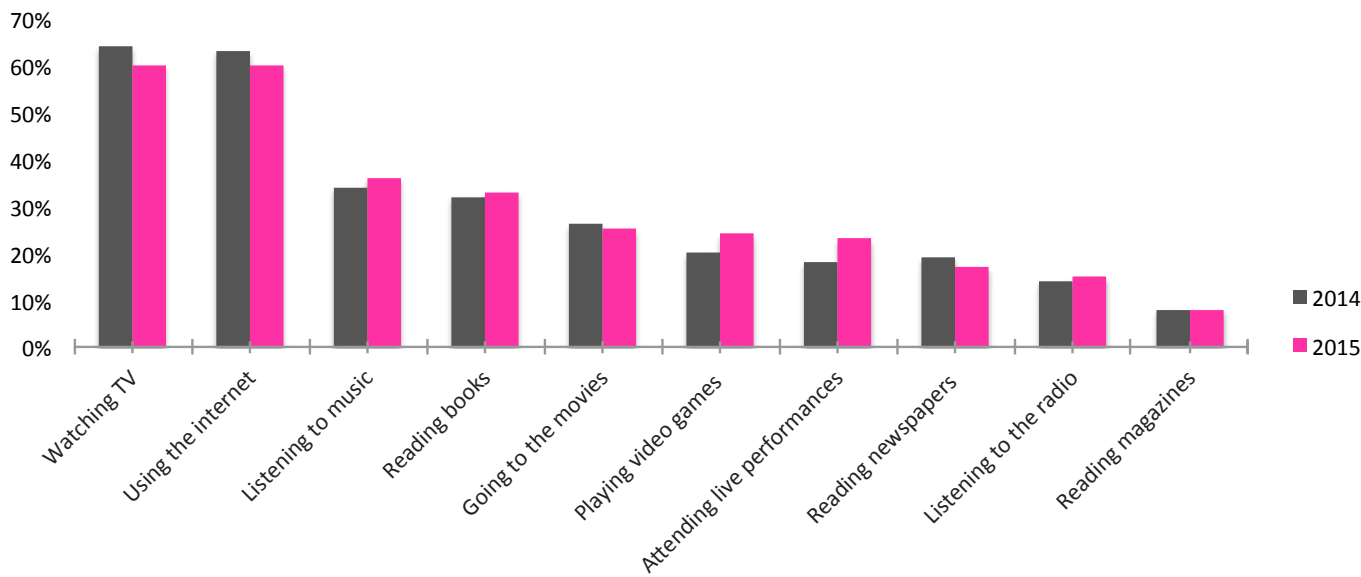
HOUSEHOLD DEVICE OWNERSHIP (Deloitte Report)	2014	2015
Laptop	87%	82%
Smartphone	81%	81%
Tablet	63%	62%

AUSTRALIAN MARKETERS PLAN ON SHIFTING THEIR ADVERTISING SPEND FROM TRADITIONAL MEDIA TO DIGITAL MEDIA AND THAT MOBILE AND SOCIAL MEDIA ARE THE TOP AREAS FOR INCREASED SPENDING IN 2015.

WHERE DOES ADVERTISING FIT IN THIS GROWING DIGITAL WORLD?

Digital marketing still has room for expansion in Australia and marketers are looking to digital to find new avenues for advertising. Research from Salesforce indicates that 31% of Australian marketers plan on shifting their advertising spend from traditional media to digital media and that mobile and social media are the top areas for increased spending in 2015. Email marketing also continues to be seen as an integral digital marketing strategy with 64% of Australian marketers believing it to be core to their business.

Advertising is developing with social media and continues to find new avenues for marketing. Australia has room for growth with social media marketing, and 4 out of the top 5 planned areas for increased spending for Australian marketers relate to social media.

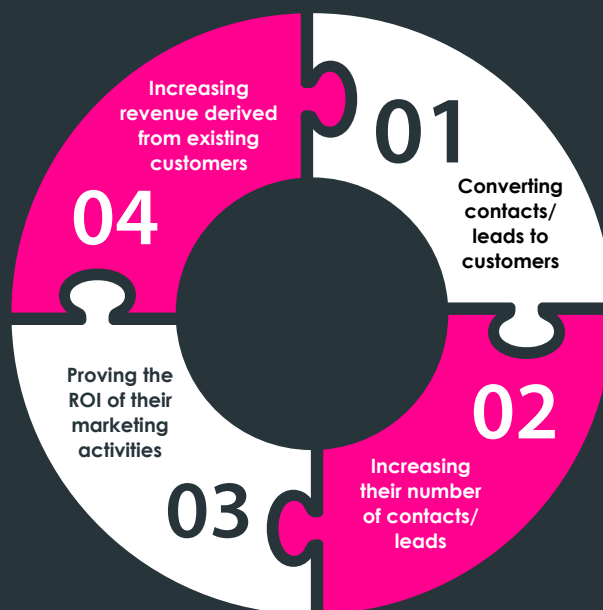| AREAS FOR INCREASED SPENDING	% of Marketers who ranked this area in their top 5
Mobile Applications	70%
Social Media Advertising	70%
Social Media Listening	68%
Social Media Engagement	68%
Social Media Marketing	68%

WHAT DO WE SEE AS DIGITAL MARKETING SUCCESS?

A report by the Economist provides insights into the priorities and challenges of Australian and New Zealand marketers from this year. They report that digital engagement is the top priority area for marketers to develop their skills in the future. As for challenges, customer acquisition is the biggest one for Australia and New Zealand, and that customer acquisition programmes will be the most invested in for 2016.

Research from Experian corroborates the Economist's insights by reporting that the top challenges for Australian and New Zealand marketers are customer acquisition (55%) and marketing automation (43%). The top three marketing priorities for the new year from this report are similar, building a customer acquisition strategy came in first with 57% of marketers reporting it as their top priority, followed by storytelling that makes the brand stand out (52%) and creating and maintaining customer satisfaction and loyalty (40%).

For global inbound marketers Hubspot reports that the highest priorities for the coming year are: (State of Inbound, 2015)

Increasing revenue derived from existing customers

04

Converting contacts/ leads to customers

01

Proving the ROI of their marketing activities

03

Increasing their number of contacts/ leads

02

HOW EFFECTIVE ARE THE VARIOUS CHANNELS OF DIGITAL MARKETING?

Hubspot asked marketers what they believed to be the most overrated marketing tactics and, as a result, paid print advertising took out the top spot with 37% of inbound marketers and 32% of outbound marketers choosing it as the most overrated, the majority selection for both marketing categories. (Hubspot, 2015)
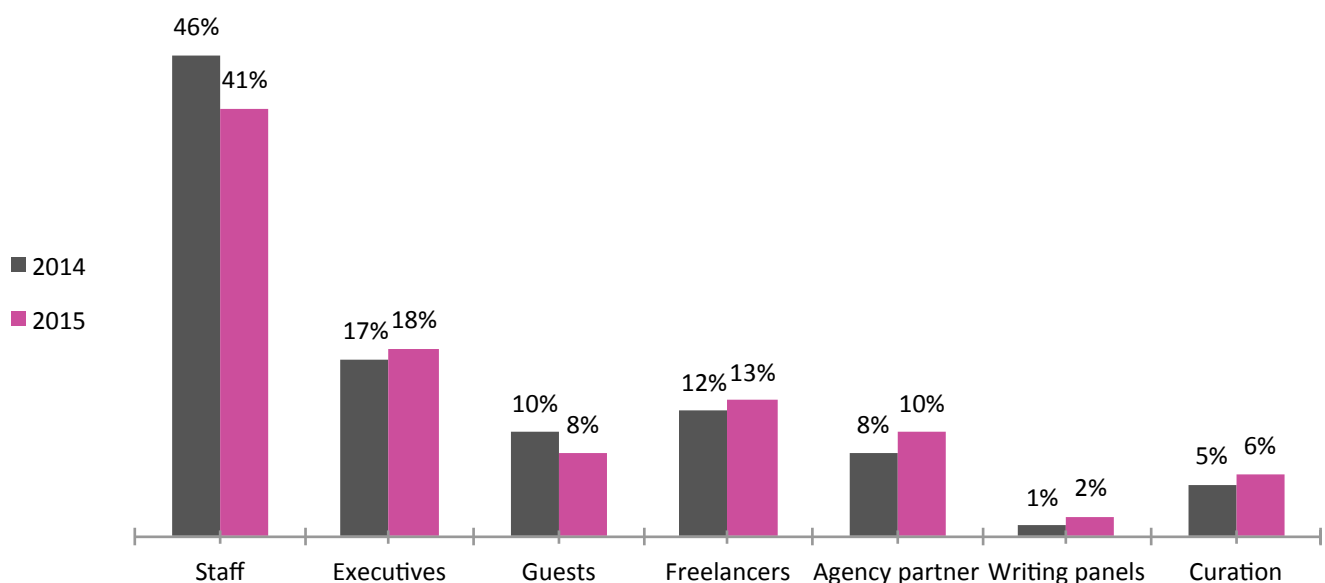
02

CONTENT
MARKETING

With **emerging and evolving** avenues for online content marketing, a review of the year is vital to see what has **changed and what is in store for the future.**

THE GLOBAL VIEW

In terms of inbound versus outbound marketing, inbound remains on top with 3 out of 4 marketers globally prioritising inbound over outbound. Outbound tactics are also seen as becoming more and more obsolete. HubSpot reports that globally, from survey based research, both inbound (37%) and outbound (32%) marketers thought that paid outbound tactics are 'a waste of time'. Along with that, they found that 57% of successful marketers (those who saw a greater ROI than their previous year) thought that paid advertising (both online and offline) was the most overrated marketing tactic.

As for content creation, HubSpot reports that the outsourcing of content creation is on the rise with freelance and agency partners seeing an increase from 2014 to 2015, however the bulk of content creation still rests with staff. (Hubspot, 2015)

WHO IS WRITING CREATIVE CONTENT

Legend:
- 2014
- 2015

| Category	2014	2015
Staff	46%	41%
Executives	17%	18%
Guests	10%	8%
Freelancers	12%	13%
Agency partner	8%	10%
Writing panels	1%	2%
Curation	5%	6%

SPOTLIGHT ON AUSTRALIA

Content marketing in Australia remains a strong discipline with 81% of Australian marketers reporting that they use content marketing and 46% of those stating that they have a clearly documented content marketing strategy, an increase from only 37% in 2014.

Content marketing does not seem likely to slow down in 2016 either with 87% of Australian marketers planning on increasing the amount of content they create and 58% planning on increasing their content marketing spend in the coming year. Currently the majority of Australian marketers (24%) only spend between 1% to 9% of their marketing spend on content marketing.

The top tactics for content marketers are changing as the power of social media and online avenues of promotion grows. The Content Marketing Institute surveyed Australian content marketers and found that the top three most used tactics were Social Media Content (92%), Website Articles (87%), and Photos/Illustrations (85%). However the top three most effective tactics were In-person Events (72%), Social Media Content (70%), and Videos (70%). (CMI, 2016)

CONTENT MARKETING TACTICS
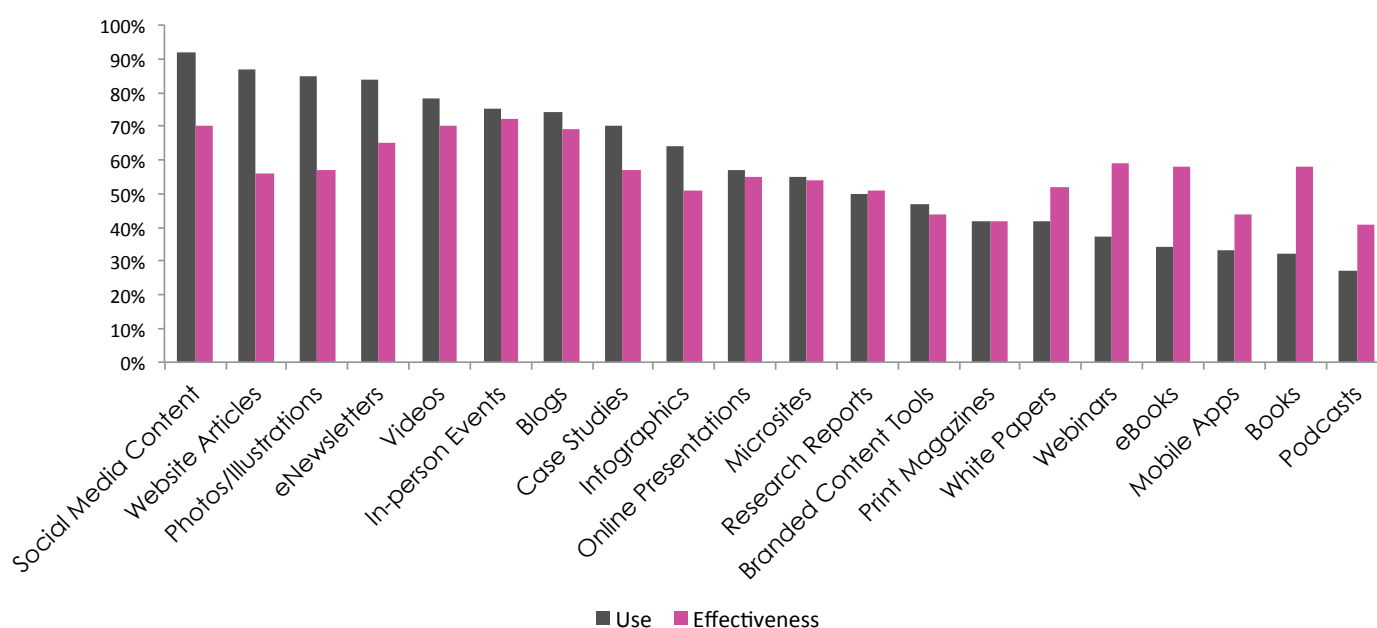
Use   Effectiveness

Photos/Illustrations and Online Presentations had the greatest increases in usage this year, and the greatest increases in effectiveness belonged to Social Media Content and Videos.

GROWTH OF USE AND EFFECTIVENESS

Legend:
- ■ 2015 (growth purely for stacked chart purposes)
- ■ 2014
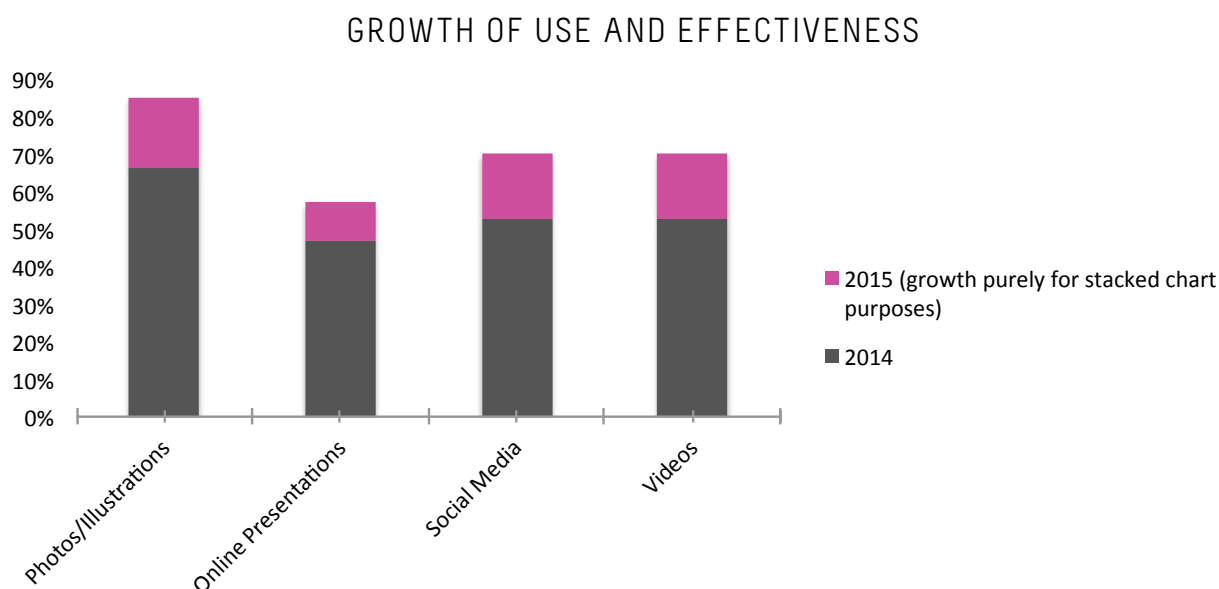
This year content marketers saw several challenges, mostly to do with measuring metrics and the changing nature of content marketing. The top five challenges of this year in content marketing, as reported by CMI, are as follows:

Producing Engaging Content	**69%**
Measuring ROI	**54%**
Producing Consistent Content	**54%**
Measuring the Effectiveness of their Content	**52%**
Producing a Variety of Content	**39%**

As for the coming year, the priorities of Australian content marketers are on content and consumers: (CMI, 2016)

Creating More Engaging Content	**84%**
Better Understanding of What Content is Effective	**55%**
Finding More/Better Ways to Repurpose Content	**53%**
Better Understanding of their Audiences	**50%**
Creating Visual Content	**47%**

03

MARKETING TECHNOLOGY

With **digital marketing** still growing to cover a number of emerging platforms it is important to know what technology is out there that is **helping marketers create cohesive campaigns**. There are a number of marketing technologies out there, but we will focus on three major companies: **Hubspot, Salesforce, and Infusionsoft** - all of whom provide varied methods and programs.

WHO ARE THESE COMPANIES?

Hubspot has been around since 2006 in the US and has recently made a move into Australia in 2014 by establishing an office in Sydney. Before the move, however, they already had a substantial Australian client base of 535 customers. Hubspot's founders believe that consumers do not want to be interrupted by advertisers but instead be helped by them. Their mission is to make businesses all around the world more focused on inbound marketing. (Hubspot)

Salesforce is another global company which was founded in 1999 and has about 203 Australian customers. Salesforce is reported to have been born from a want to reinvent customer relationship management in a cloud based platform. They pride themselves on their Sales Cloud being named the world's No.1 CRM application. Salesforce also recently announced a partnership with Microsoft to help make their programs more easily integrated with Microsoft programs. On top of this they have also joined a program initiated by Instagram called the Instagram Partners program. This initiative is designed to help companies who want to advertise on Instagram to get in touch with digital marketing heavyweights. (Built With Trends, Salesfoce, Instagram)

Infusionsoft's mantra is specifically focused on small businesses, with their technologies designed to meet small business needs. They describe themselves as the champions of small businesses, with a strong desire to help startups and entrepreneurs. They are also a global company boasting 30,000 small business clients, with approximately 600 of those being in Australia. (Built With Trends and Infusionsoft)
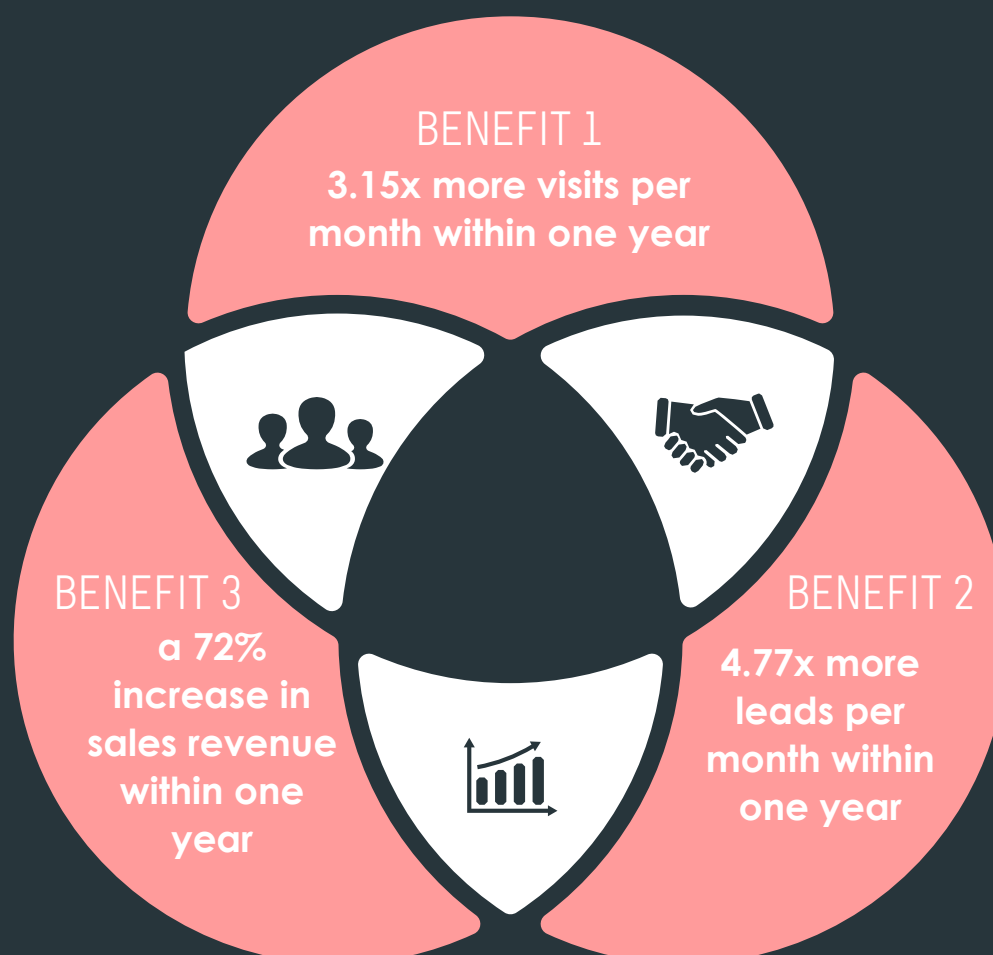
WHAT DO THEY DO?

Hubspot's software consists of tools designed to increase traffic, grow leads, provide easy to use analytics, and to help manage an overall online marketing strategy. They provide content management tools which help streamline content for emails, blogs, social media, and websites. They also provide lead tracking tools to help nurture leads from emails and other consumer interactions.

As for stats, Hubspot states on their website that, by using their technology, **customers will gain:**

BENEFIT 1
3.15x more visits per month within one year

BENEFIT 3
a 72% increase in sales revenue within one year

BENEFIT 2
4.77x more leads per month within one year

Salesforce provides a number of products which focus on sales, customer service, marketing, community, analytics, and app building. They have cloud services and separate apps for each of these sections which are designed to give the client options to choose from. (Salesforce)

All of these services aren't exactly cheap, though, as Gartner reported earlier this year that Salesforce is the highest priced cloud SFA product on the market. (Gartner)

When it comes to stats, they focus on the results that their cloud systems are achieving for their customers. For their sales and service clouds they boast 45% faster average handle time, 45% increase in cost savings, and 45% increase in customer satisfaction. As for their marketing cloud (email, mobile, social, websites) they report a 36% increase in customer satisfaction, and that customers are 28% more willing to recommend and 33% less likely to cancel.

Infusionsoft's product is more targeted towards small businesses and therefore is designed to be simple enough to be easy to use but complex enough to give their customers an edge in digital marketing. They focus on automation and customer relation management, providing a platform to integrate all their systems, and apps for clients to pick and choose from to create the strategy they need.

Unlike Hubspot and Salesforce, Infusionsoft does not provide many statistics of their overall product on their website, rather they promote their down to earth culture and their 'care for the cause, and care for the people'. They do provide customer testimonials and statistics to go with them as a measure of their clients' success.

WHO DO THEY WORK BEST FOR?

Hubspot is a global company with big ambitions, they currently operate in more than 90 countries with upwards of 15,000 clients across them. On their website they have a number of Australian companies with associated statistics about how Hubspot has helped them grow. These companies include accounting firms, software providers, sales, financial, and demographics companies. Hubspot is more aimed towards larger companies and showcases the testimonials from these companies more than small businesses.

Salesforce has similar ambitions to Hubspot and pride themselves on the global recognition they achieve. On their customer testimonials page they provide an impressive client list but they also have a dedicated page for small business success stories. Their products are designed for both big and small companies, however their price might not be as favourable towards small businesses.

Infusionsoft prides itself on being a company for small businesses. They state on their website that they started as a small business themselves and understand the needs of small businesses. While they have grown into a global award winning company, their focus remains on small business culture.

04

MOBILE

AUSTRALIAN MOBILE STATISTICS

The creation of the smartphone has brought mobile technology into almost every house in Australia. Smartphone ownership has increased from 11.4m to 15.4m from April - June 2013 to March - May 2015, and Australians over the age of 18 spend more time on their smartphones than any other digital device.

The average Australian has over 202 individual sessions on the phone per month with these sessions lasting approximately 9.9 minutes (The Mobile Story). On average, Australians spend 1 hour and 32 minutes per day on the internet through their mobile phones (Digital, Social, and Mobile in APAC 2015).

Australia lags behind South Korea, Singapore, Japan, China, and Hong Kong in average mobile net speeds but, despite this, over 90% of Australian mobile phones are broadband enabled.

So what are Australians using their mobile phones for these days?

Despite the wide array of activities available on smartphones, the main use continues to be just as a phone, however internet access and information retrieval are definitely prevalent uses for phones nowadays.

HOW WE USE OUR MOBILES
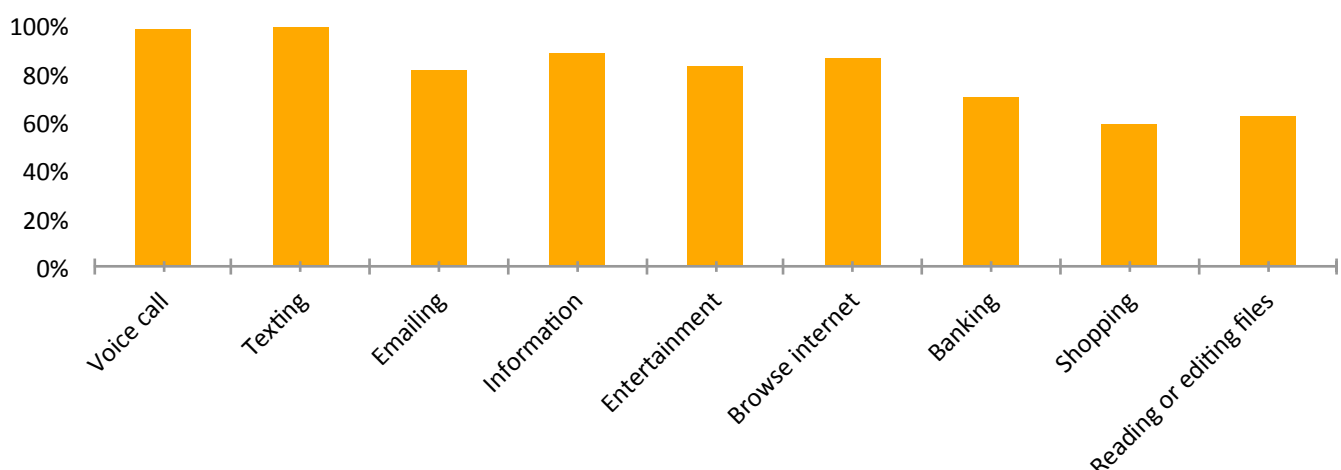
MOBILE ECOMMERCE

Mobile technologies are providing a way for Australian consumers to easily and quickly make purchases anywhere and at anytime. Mobile technology also gives consumers an easy avenue for researching products before they buy, either online or instore.

Laptops are still ahead of smartphones in the online path to purchase, however they should not be discounted; as seen with the previous section, laptop ownership is being overtaken by mobile technologies. IAB found that 50% of Australians will use their laptop or PC to research a purchase against 20% using their mobiles. Further, 51% used a laptop or PC to make a purchase and 15% used their mobiles to make a purchase. (APAC, 2015)

Similarly, in research conducted by Fairfax, only 32% of respondents said they had used their mobile devices to make a purchase in the last three months, whereas 67% had made a purchase using their laptops. (Fairfax Mobile Network, 2015)

So what are people buying on their phones? Research from AIMIA indicates that Australians are mostly buying tickets and digital content for their phone over general retail. (AIMIA, 2015)

PERCENTAGES OF PURCHASES MADE THROUGH MOBILE
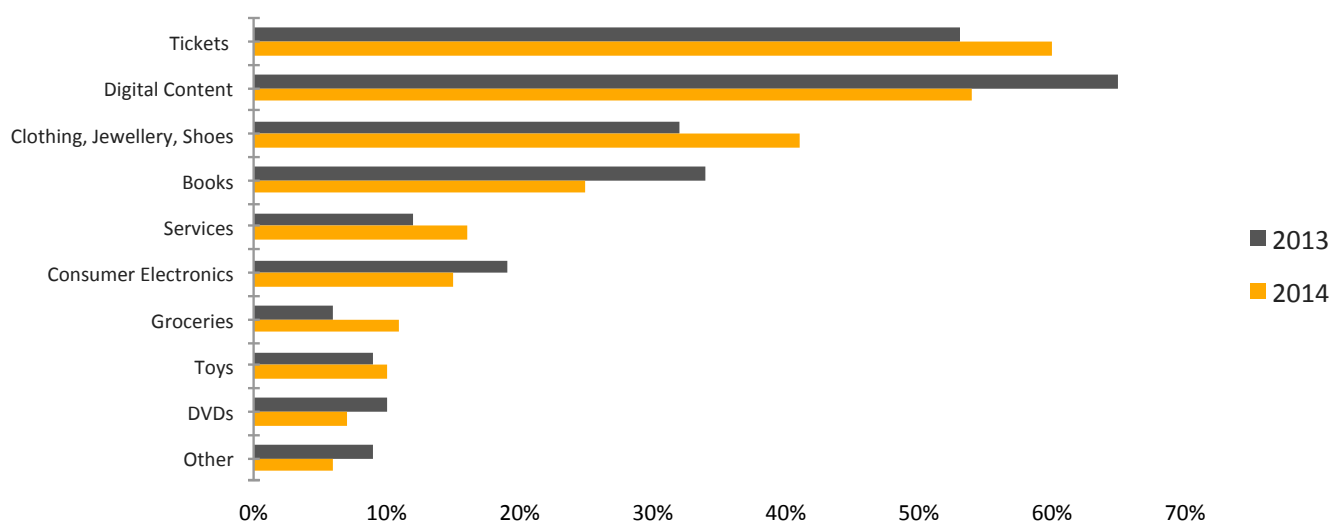
Who is making these purchases? According to Deloitte's Mobile Consumer Survey, it is 25-34 year olds who lead the pack in browsing shopping websites and making purchases online using their mobile devices. (Deloitte, 2015)

AGE GROUPS AND MOBILE SHOPPING

□ Browse Shopping Website   □ Making Purchases Online
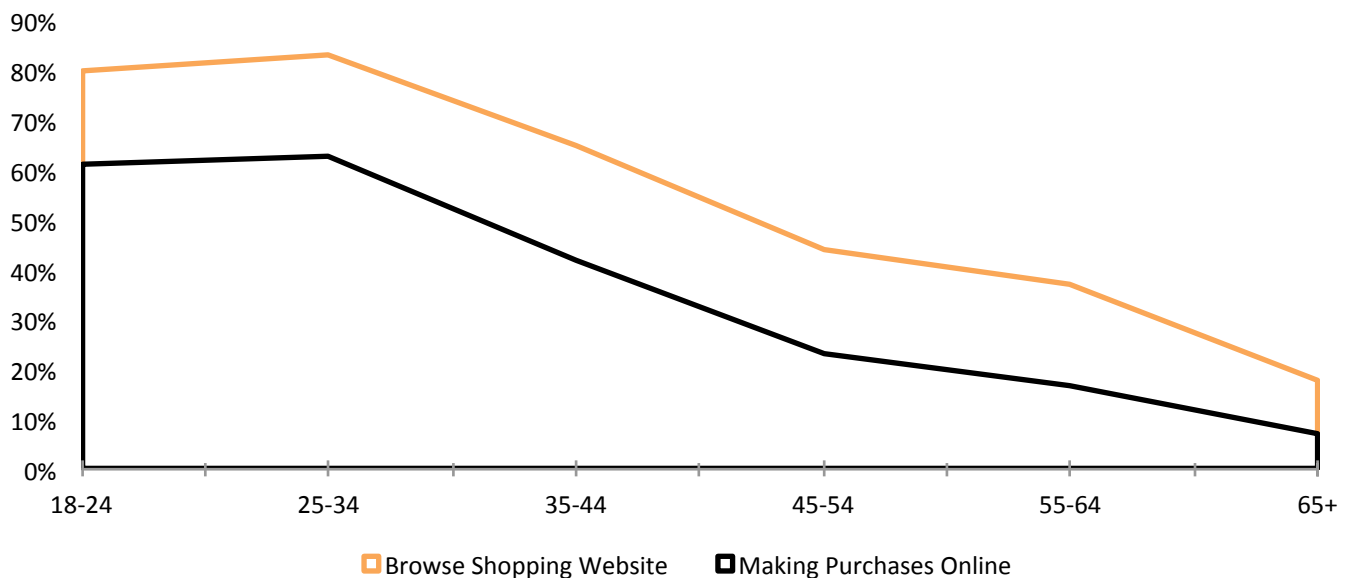
ADVERTISING ON MOBILE

Advertising on mobile devices is often seen as intrusive and disruptive to the consumer, but all is not lost as advertisers are learning to work at inviting the customer to be advertised to rather than bombarding them with irrelevant products.

HOW DO CONSUMERS VIEW MOBILE ADVERTISING?

Deloitte's Survey indicates that consumers still are adversed to intrusive mobile advertising, with 77% of respondents indicating that mobile advertising is more intrusive than ads on desktops. However, the report also revealed that 50% of Australians are willing to receive mobile advertising in order to get the free content they want.

Mobile's tracking ability allows an opportunity for advertisers to reach consumers close to them, however consumers are not fully on board with the idea of advertisers being able to know where they are. When AIMIA asked Australians in 2014 about where they would like to receive an offer from a brand they like, the majority (48%) responded that they would not like to receive an offer at all. Deloitte's report indicates a similar mindset of Australians, with only 38% of total respondents answering that they would be willing to receive advertising on their smartphone based on their location.

The statistics show that consumers have a generally negative view of mobile advertising, and yet mobile advertising is currently one of the biggest areas for growth and focus for marketers.

HOW DO MARKETERS VALUE MOBILE ADVERTISING?

As of 2015, Australian marketers are placing a heavy focus on mobile advertising with Salesforce reporting that it is the top area for increased spend, tied with social media advertising.

Salesforces also reports that 69% of Australian marketers have integrated mobile marketing into their overall marketing strategy, 56% believe mobile marketing is core to their business, 54% have a dedicated mobile marketing team (a 33% increase from 2014), and that 40% rate mobile website or app traffic as the most important mobile marketing metric.

So why do marketers value mobile advertising so highly? Well, mobile advertising provides a wealth of analytics about an advertiser's particular audience, and it has proven to provide a large amount of revenue.

Globally, 69% of marketers track mobile analytics and 18% use location-based analytics. Of those who track location-based analytics, 67% found it to be very effective.

As for revenue, IAB reported that globally mobile advertising revenue grew 64.8% from US$19.3 billion in 2013 to US$31.9 billion in 2014. In the report, Australia is grouped under Asia-Pacific, which boasts the second largest revenue share of the global total of 36.5% and a revenue growth of 55% from 2013 to 2014.

MOBILE REVENUE GROWTH (IN US$ MILLIONS)
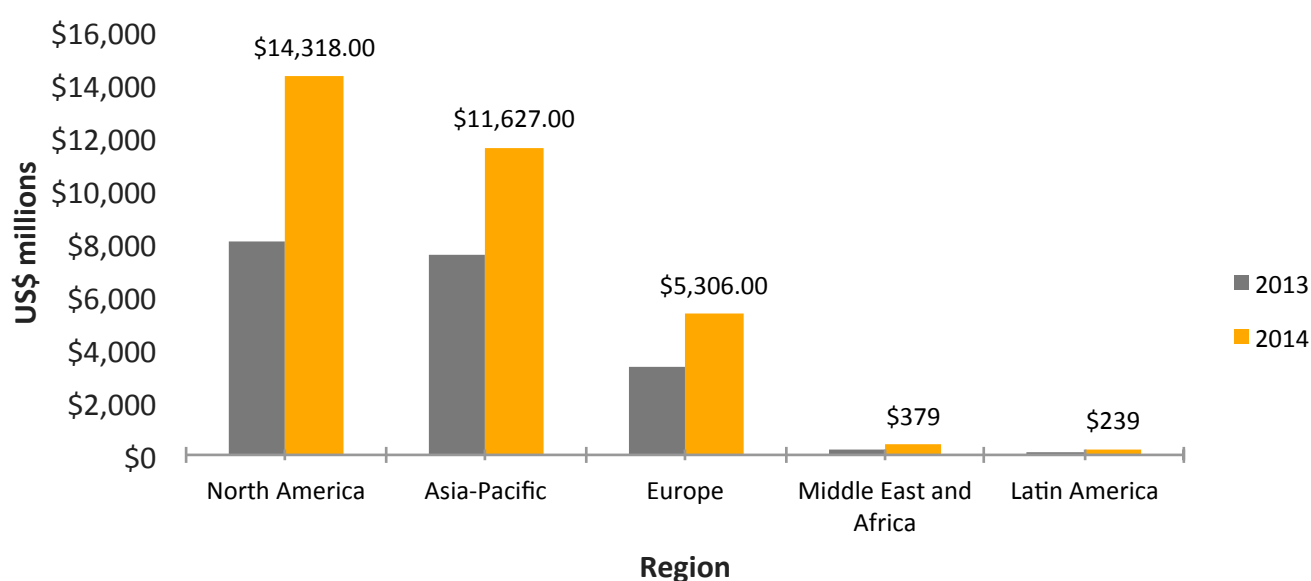
REGION	SHARE
North America	44.90%
Asia-Pacific	36.50%
Europe	16.60%
Middle East and Africa	1.20%
Latin America	0.80%

Specifically in Australia, though, mobile advertising grew 84% in 2015 to reach $1.1bn, with display advertising being reported as the dominant category of mobile advertising as of June 2015. Smartphones are also bringing in more revenue than tablets with smartphones' revenue share at 66% and tablets at 34%.

Not all mobile advertising is on the same level, though, with some types being more prevalent but others providing better interaction rates. IAB reports that at June 2014, banner ads were the most pervasive on mobile but interstitial ads and native ads were more successful on mobile. Interstitial was reported to have 1.5 times higher click through rates and 2 times higher conversion rates, while native advertising had 1.2 times higher click through rates and 4 times higher conversion rates. (Mobile Programmatic Playbook, 2015)

Because of screen size banner ads become much larger on mobile and this may be the reason for consumers finding them so intrusive to their mobile experience. Therefore it is unsurprising that consumers would find advertising that distracts less from the content they are consuming to be more successful.

MOBILE SEO

April 21st 2015 marked an important date for mobile search engine optimisation as Google brought in a series of changes that would prioritise websites that had mobile-friendly websites when searching on mobile. This is important as websites that do not have mobile-friendly websites will be disadvantaged on mobile searches. The move is an understandable one with consumers being likely to close out of a website on mobile if it does not display in a readable way, and is likely to compel businesses and brands to consider the power that mobile holds for visibility and revenue.

05

SOCIAL
MEDIA

WHO IS USING SOCIAL MEDIA AND WHICH ONES ARE THE MOST POPULAR?

Australians are avid users of social media; in 2015 there were 13.8 million active social media users in our country, and 12.4 million active mobile social media users. Social media users are still growing in Australia as well, from January 2014 to March 2015 there was about an 8% increase in users. Across devices, we spend about 2 hours and 4 minutes on social media each day.

Facebook continues to be top-dog in terms of users, dominating the stage both in Australia and globally. Facebook is followed by YouTube, Wordpress, and then Instagram - which has been growing steadily after its acquisition by Facebook. Twitter lags behind Tumblr and LinkedIn in Australia, and Snapchat falls behind further still with less users than WhatsApp and TripAdvisor. (Social Media News).

AVERAGE MONTHLY ACTIVE USERS
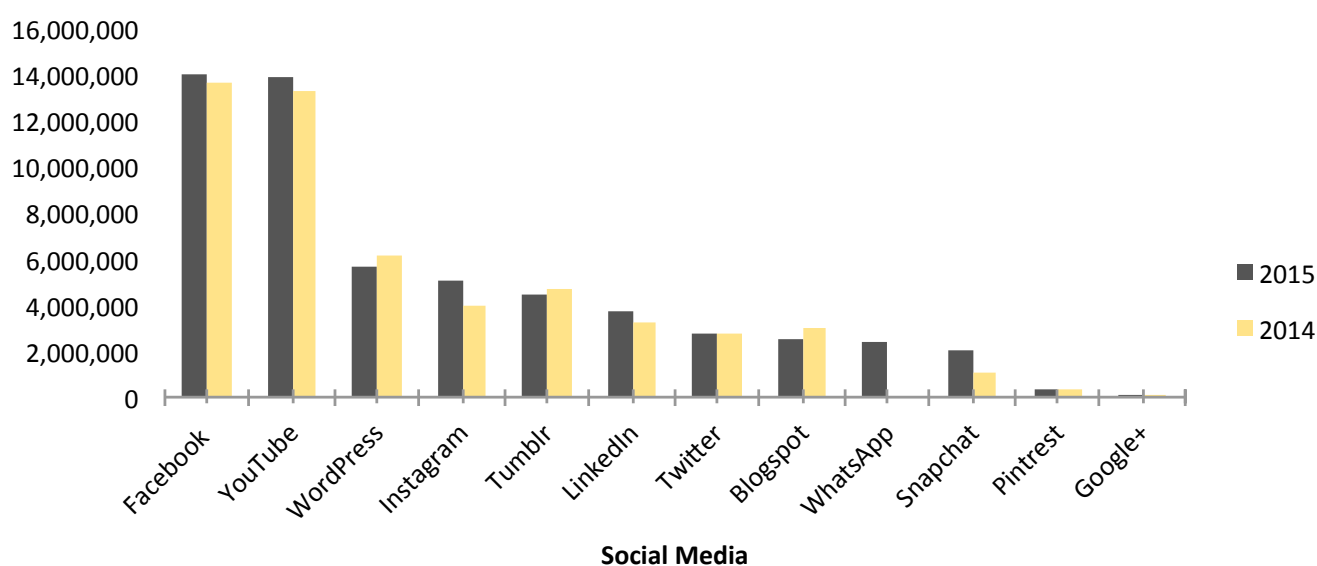
LinkedIn, Instagram and Google+ have all seen increases in usage by Australians in the past year but still all lag behind Facebook, even with a slight decline in usage this year. Twitter also saw a decline in Australian users this year, with Sensis reporting that around 39% deleted their profiles. The average time Australians spend on Twitter is declining, as well; it now sits at about 10 minutes per day.

As for the marketers, a survey of content marketers by the Content Marketing Institute found that the most popular social media sites for content marketing were LinkedIn (89%), Twitter (79%), and Facebook (76%).

SOCIAL MEDIA USAGE BY CONTENT MARKETERS
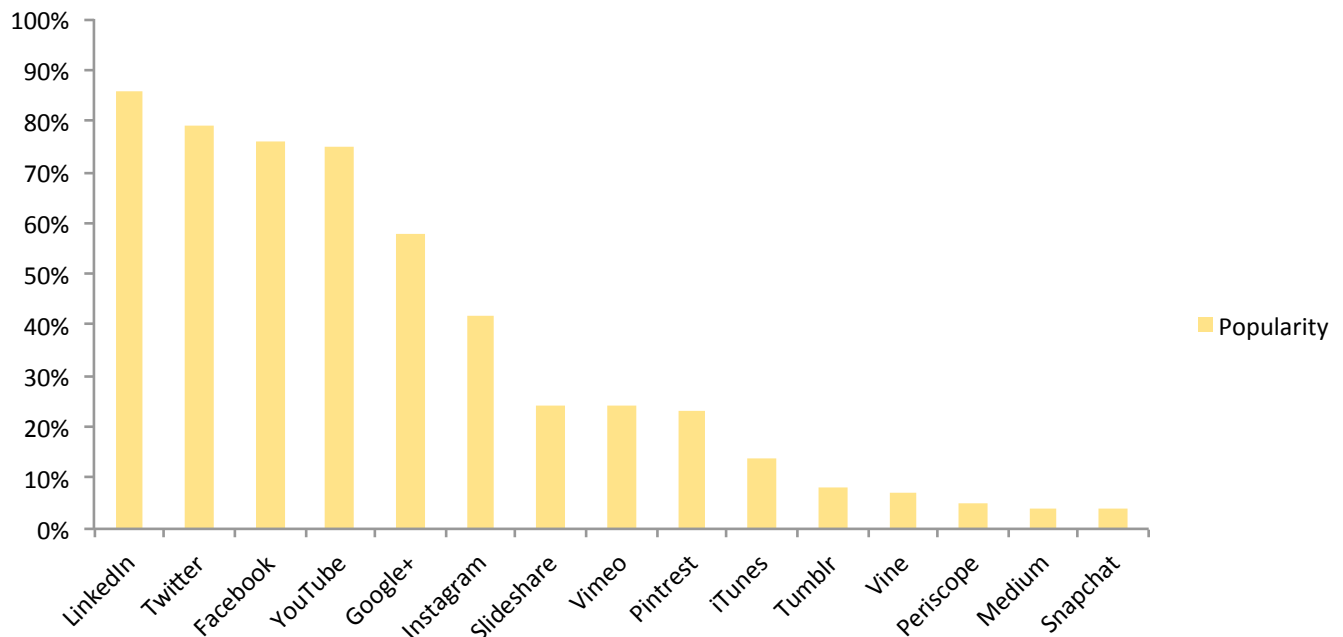
A fairly high amount of Australian content marketers still use Google+, however it had one of the lowest report effectiveness rates of all the social media sites. Snapchat surprisingly had the lowest usage rate and did not have an effectiveness rating as of yet.

EFFECTIVENESS OF CERTAIN SOCIAL MEDIA FOR CONTENT MARKETERS
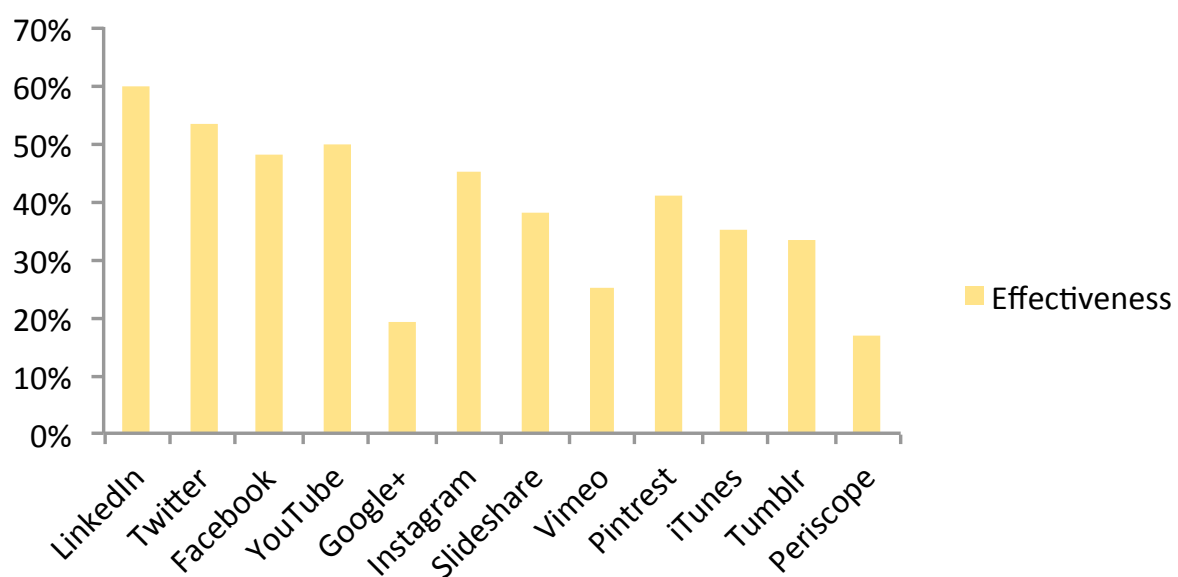
HOW MUCH DOES SOCIAL MEDIA MAKE FROM ADVERTISING?

Social media is a growing and evolving avenue for online advertising and the revenue speaks for itself. Facebook continues to see high advertising income; and the future seems bright for Snapchat and Instagram, both of which have recently ventured into the social media advertising game.

The financial reports for Facebook, Twitter, and LinkedIn are currently available for free to the public and outline how much of their revenue comes from advertising.

AD REVENUE 2014 (FULL YEAR) & 2015 (FIRST 3 QUARTERS ONLY)
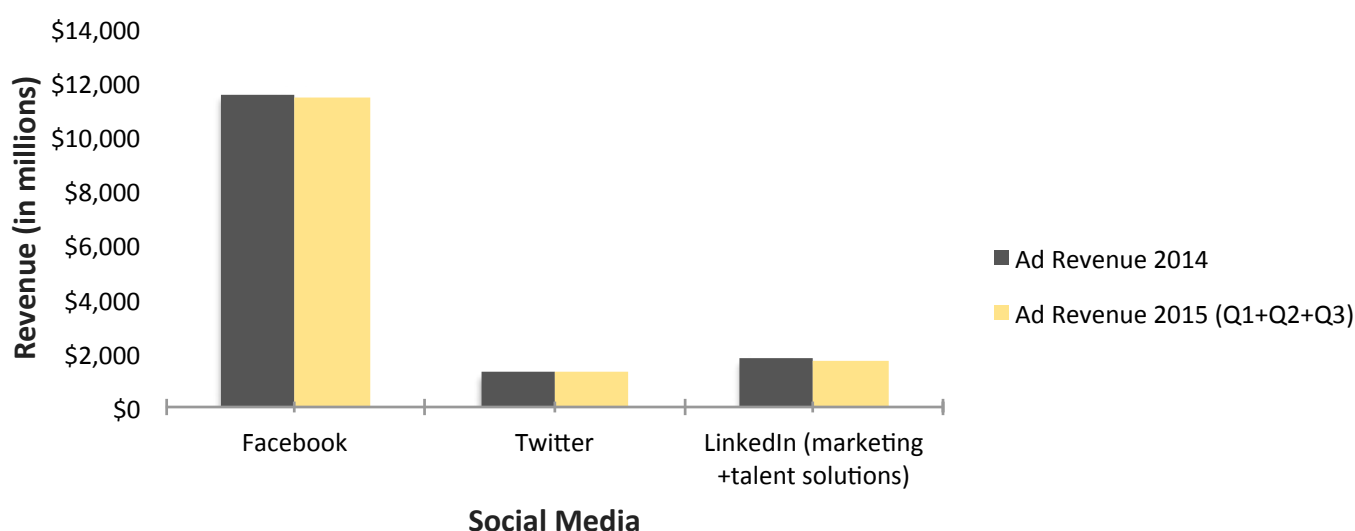
% OF AD REVENUE FOR 2014 (FULL YEAR) & 2015 (FIRST 3 QUARTERS ONLY)
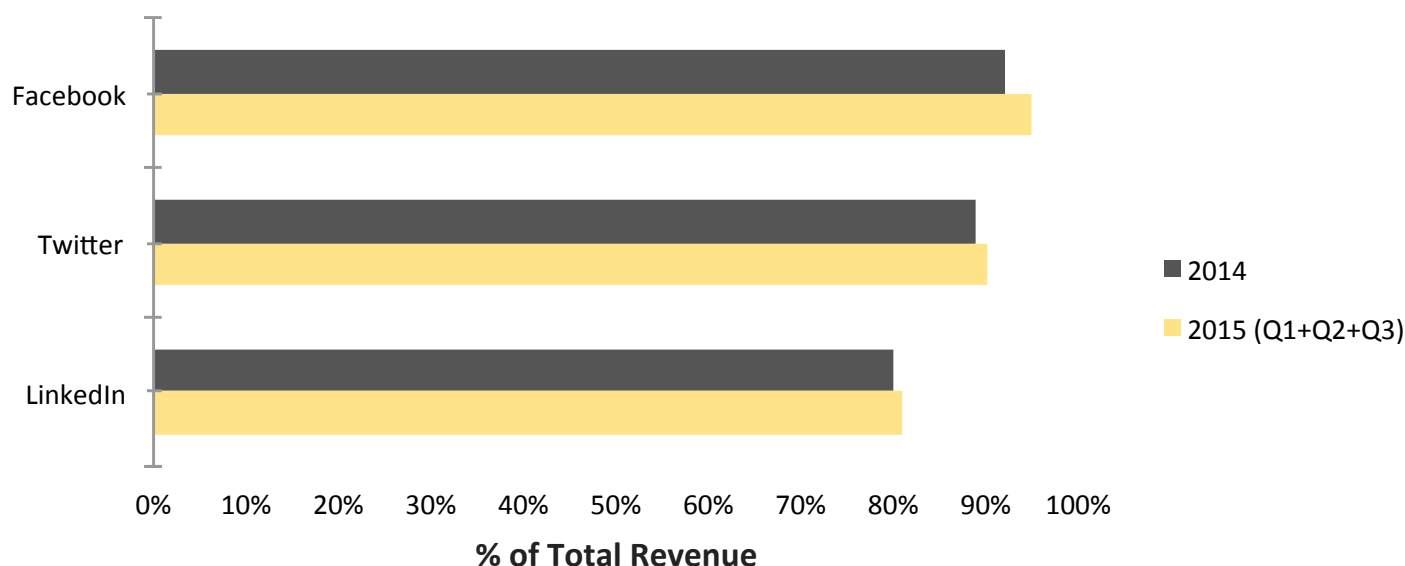
Since Instagram and Snapchat have only just start incorporating advertising this year, there are no proven revenue statistics of yet - however, Instragram seems to have a positive outlook for the future. They recently published a report in partnership with Hoop Group to provide a snapshot of the habits of Australians on Instagram to give advertisers an insight on how they can appeal to an Australian audience. They provide an audience profile with the most prevalent age groups and genders on Instagram (retrieved from the Facebook profiles) and statistics that would be appealing for advertisers such as:

- **23% of Australians use Instagram to follow a brand, which is more than Facebook (21%);**
- **48% say that Instagram is a great way to find out about new products and services;**
- **68% of Australians on Instagram say brands need to be creative to make an impact; and**
- **43% of Australian users have taken an action after seeing a sponsored post (Hoop Group, 2015)**

For Snapchat, while the short-lived nature of content and the ambiguity surrounding user details may turn off some advertisers, ads on Snapchat have been highly anticipated. A report from Millward Brown in partnership with Snapchat revealed that users positively received the first few ads released by Universal Pictures and Electronic Arts with 60% of users enjoying sponsored 'Our Stories' and 44% enjoying 'Brand Stories'. The nature of Snapchat's ads are generally unobtrusive - the ad will appear at the top of their 'Recent Updates' feed but a user has to choose to view it.

WHAT'S IN STORE FOR THE FUTURE OF SOCIAL MEDIA ADVERTISING?

Social media is constantly evolving and updating itself to create new and creative means for brands to engage with their audience in meaningful ways.

Facebook has definitely not stagnated with their advertising and are still looking to new ways to give brands a chance to creatively showcase themselves. Carousel ads were released in 2014 and they allow brands to show up to five images or videos in a single ad, which a viewer can swipe through. Advertisers have been able to use this to go beyond the limited screen size on mobile and to pack more content into a single ad. Facebook has reported that the format is successful, as well, with a 30-50% lower cost-per-conversion rate than ads with only one image. (Facebook)

Facebook has also updated Local Awareness Advertising, its targeted advertising program based on location tracking that helps ads appear to users who are close to a brand's physical store. The update introduces better optimised call-to-action buttons, which puts customers in contact with the store closest to them, and options for different ads to run in different locations for the same brand.

Instagram has also **recently launched** its Instagram Partner Program, which **connects brands with advertising partners** through Instagram to help them create engaging content. Instagram has **40 partners**, including Hootsuite and Salesforce, which are available to help brands with **Ad Tech, Community Management, and Content Marketing.**

Instagram is going full steam ahead with advertising, introducing new and creative ways for brands to connect with users. Like Facebook, Instagram has also rolled out the carousel ad format, which is perfectly suited to Instagram's visually-focused design. Also the demographics provided by Facebook, if a user has linked their Facebook account with their Instagram account, will provide a wealth of information to advertisers to help them tailor their content to their audiences. Instagram has also recently launched its Instagram Partner Program, which connects brands with advertising partners through Instagram to help them create engaging content. Instagram has 40 partners, including Hootsuite and Salesforce, which are available to help brands with Ad Tech, Community Management, and Content Marketing. (Instagram)

Twitter is looking to increase their advertising revenue by offering more options for advertising and more in depth analytics of their audiences. Twitter recently launched Moments, a new service for users that highlights a particular prominent story in the world and provides a collection of tweets in chronological order which relate to that story. Now Twitter is looking at implementing Promoted Moments, which the company states will have the same look and feel of regular Moments but will be authored by a brand and be featured in the Moments guide for 24 hours. It will also will be stamped with a Promoted badge. Continuing to cater to their advertisers, Twitter recently launched an analytics program called Brand Hub. Brand Hub allows advertisers to get in depth analytics about their product on Twitter with tools that measure what conversation is being generated about their product and the demographics of people tweeting about it. Brand Hub also looks to be a potential contributor to the rise of influencer marketing with a tool that allows brands to identify which influencers are talking about their brand. (Twitter)

Snapchat is finally looking to make money off their product by introducing advertising and paid replays. As previously discussed, advertising on Snapchat is looking to be a successful outlet for advertisers with sponsored 'Our Stories' and 'Brand Stories'. As well, though, Snapchat recently trialled branded selfie lenses in which an advertiser can pay to create a lense on Snapchat which users will then take and apply to their snaps, with the Peanuts movie being the first to trial this new branding format. This is creating participatory branding in which a user opts in to the experience of promoting a brand in return for the use of a free lense. (Digiday) Snapchat has also launched a new feature called 'Snapcash' which allows users to quickly send money to other users and is processed through their financial partner Square. Snapchat will not charge a transaction fee at this time, so it seems as though is not so much a revenue venture as a feature to attract new users. (SnapChat)

06

EMAIL MARKETING

Email marketing has been, and continues to be, a **critical tool for brands** and companies to engage with their customers **in a personal fashion**. For digital marketers, email has proven to be **effective with providing return on investment** and communicating directly with consumers.

WHAT ARE THE NUMBERS?

Vision 6's email metrics report shows that as of December 2015 mobile is the most popular platform for reading emails sitting at 49.99%, followed by desktop at 26.57% and then webmail at 23.44%. They also show that Gmail is still the top email client followed by Apple Mail and then Outlook 2010. (Vision 6)

EMAIL CLIENT	USAGE
Gmail	34.87%
Apple Mail	23.98%
Outlook 2010	14.66%
Outlook/Hotmail	13.59%
Outlook (Other)	12.91%

As for whether Australians actually interact with their emails, Vision 6's data shows that for all Australian industries average open rates have rested around 33% for the past couple of months. Click through rates are much lower, however, fluctuating between 5% and 4%. (Vision 6)

OPEN RATE AND CLICK THROUGH RATE
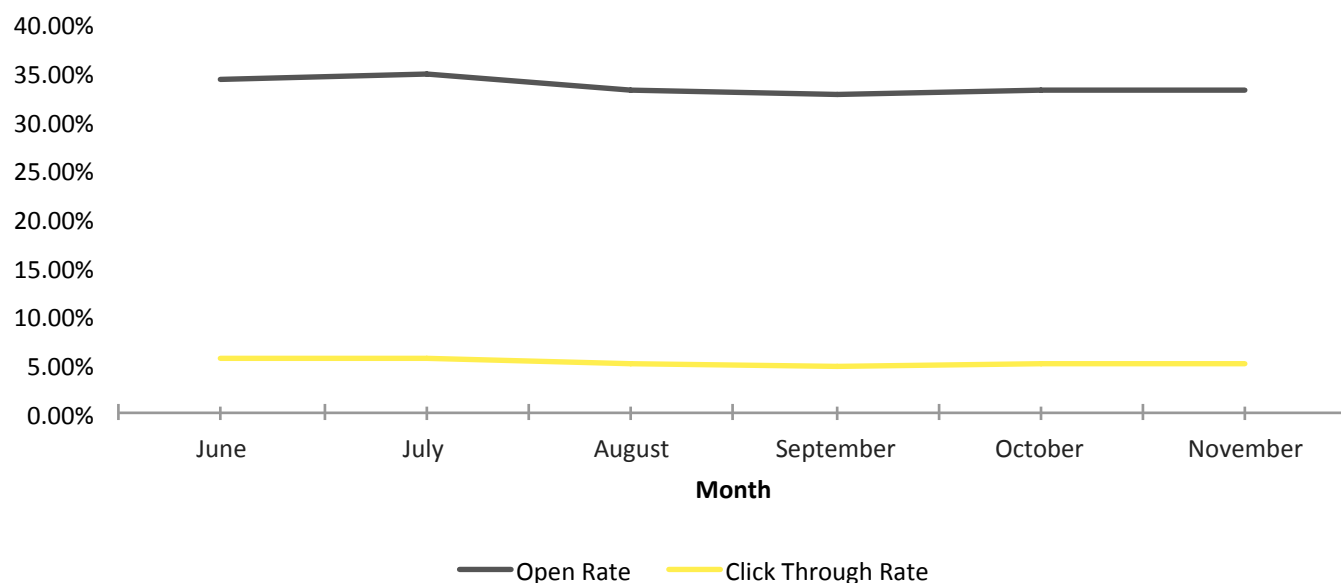
Deloitte's report on Australian media consumption stated that receiving emails from a company or brand was the 9th most important influence on buying decisions this year with 38% of respondents reporting that it had high or medium influence.

FROM THE MARKETERS

According to Salesforce, 64% of Australian marketers believe that email marketing is core to their business. On the global stage, 53% of marketers stated that email produces a return on investment for their clients (21% significant ROI, 32% some ROI), and 60% said that 'email is a critical enabler of our products and services'.

For the first quarter of the year Experian reported that, in Australia, the average revenue per email was $0.026. But revenue is not the only important metric to look at for email marketing and 40% of Australian marketers actually regard conversion rate as the most important metric.

WHAT MAKES A GOOD EMAIL?

With email being such an important section of any digital marketing strategy, we need to understand what makes a good email, or rather what makes an email one that a customer will interact with.

According to MailChimp, we should be looking at our subject lines and at segmenting campaigns. Through analysing emails that their clients sent, and looking at the open and click rates associated with them, they found that the least effective subject lines were ones that sounded too much like they were trying to sell something. They concluded that this may be due to the issue of spam, anything with a subject line that reads like spam often gets deleted immediately. (Mail Chimp)

MailChimp also reports on the benefits of list segmentation, using the same methods for analysing subject line comparison they discovered that segmented campaigns provide better open and click rates.

A report from HubSpot in 2014 indicated that it is the little things that make a difference when it comes to email marketing. From the words you choose to how much image or text you use, subscribers respond better to certain tactics than others.

The report shows that even though email is a good way to send a lot of information to your subscribers, it may be best if you don't. People are spending less time reading their emails, so a short word count proves the best for click through rates, and what you put in your subject line influences the first action a subscriber will take with your email.

Another important part of an email marketing strategy to remember is responsive design; 41% of Australian marketers either always or often use responsive design to build emails and for good reason. Blue Hornet reports that 42% of readers on mobile will delete the email if it does not display properly on mobile. 27% of Australian marketers reported to Salesforce that they don't know what device their subscribers are using to read their emails but with mobile being the most popular platform for reading emails in Australia it is imperative that emails are enabled with responsive design.

Opens	14.28% higher than non segmented campaigns
Unique Opens	10.36% higher than non segmented campaigns
Clicks	57.69% higher than non segmented campaigns
Bounces	1.17% lower than non segmented campaigns
Abuse Reports	8.19% lower than non segmented campaigns

MARKETING AUTOMATION

43% of Australian and New Zealand marketers saw marketing automation as a challenge this year - it is something that is still relatively new and will continue to change as new online spaces emerge and change (Experian, The 2015 Digital Marketer). However, currently marketing automation is proving to be a worthwhile challenge for those who are willing. Hubspot reported that 52% of marketers who used marketing automation saw a greater return on investment (ROI) than their previous year (Hubspot Science of Email). Subsequently, Lenskold Group stated that in their research into lead generation and marketing automation that 63% of companies who are outgrowing their competitors are using marketing automation (Lenskold, Lead Generation Marketing Effectiveness Study).

07

PAID ONLINE ADVERTISING

Paid online advertising has been a matter of some contention over the years as **some forms can be intrusive and disruptive**, and other forms can be problematic if they are not transparent enough. Still, regardless of their issues, they are a **large part of online advertising and digital marketing in general.**

The Content Marketing Institute's report on the state of content marketing in Australia provided statistics on the popularity and effectiveness of certain paid advertising formats, with online formats taking out many of the top spots.

POPULARITY AND EFFECTIVENESS OF PAID ADVERTISING FORMATS

Legend: ■ Popularity   ■ Effectivness
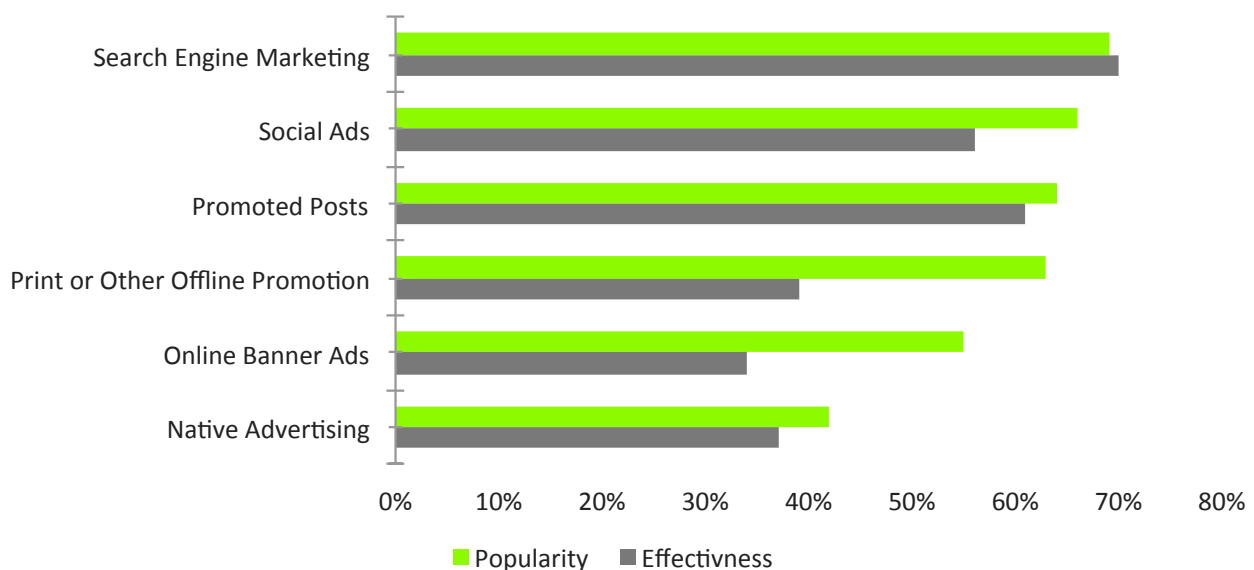
It is evident from the data that search engine marketing is both the most popular and most effective form of paid advertising, with social ads being the second most popular and promoted posts being the second most effective. Both print and other offline promotions and online banner ads are both popular, but their effectiveness is sorely lacking.

In Deloitte's media consumer survey, they report that the most influential advertising tactic, as reported by consumers, is sponsored search engine advertising - though this has been decreasing from the two previous years. The second most influential was banner advertising and the third was social media advertising.

INFLUENCE OF ADVERTISING FORMATS
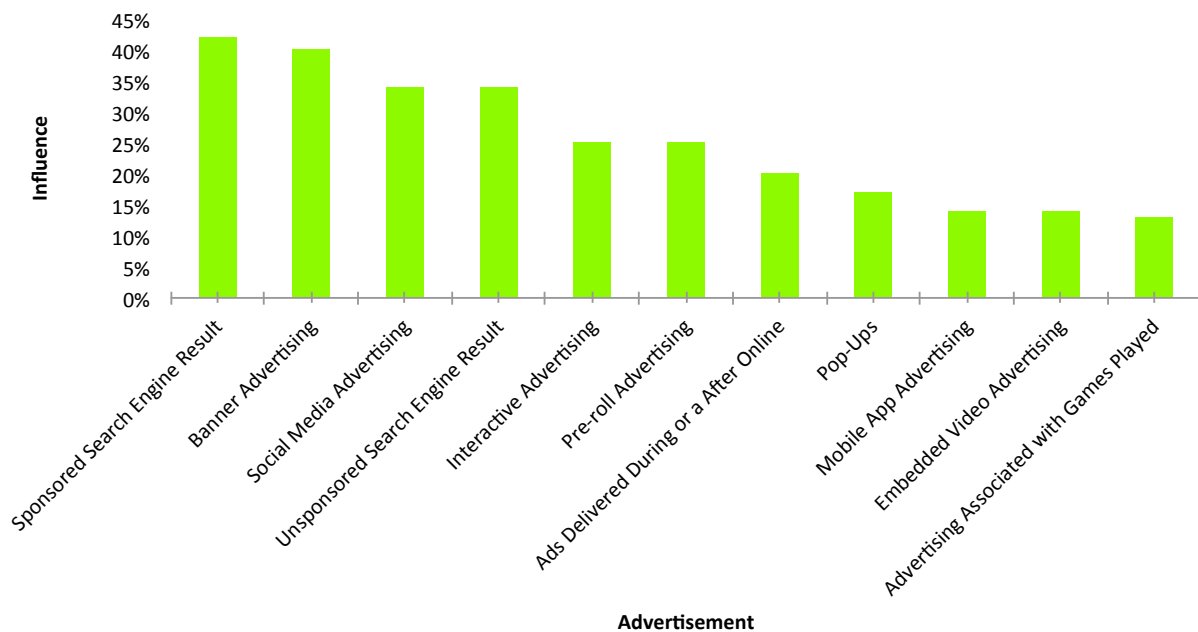
As shown by the data, paid search engine results are undoubtedly the most popular and most effective form of paid online advertising out there and Google has the monopoly on this service. Like Facebook and Twitter, Google's revenue is primarily derived from the advertising services it provides, like sponsored search engine results (Google AdWords) and ads on individual website pages (Google Adsense). As of their third quarter 2015, AdWords and Adsense made up 90% of their total revenue.

SERVICE	Q3 ($)	Q3 (%)	Q1 + Q2 + Q3 ($)	Q1 + Q2 + Q3 (%)
Google Websites (AdWords)	$13,087	70%	$37,421	70% (rounded)
Google Network Member Websites (Adsense)	$3,694	20%	$10,891	20% (rounded)

As previously stated, Google's search engine algorithms underwent some recent changes to prioritise mobile friendly search results when someone is searching on mobile. A study from SEOClarity released in 2014 gives us an insight into the state of search engine advertising on mobile. They released the click through rates for the ranked advertisements both on desktop and on mobile and it was shown that an advertisement in the first ranked position on mobile had a higher click through rate than one on desktop.
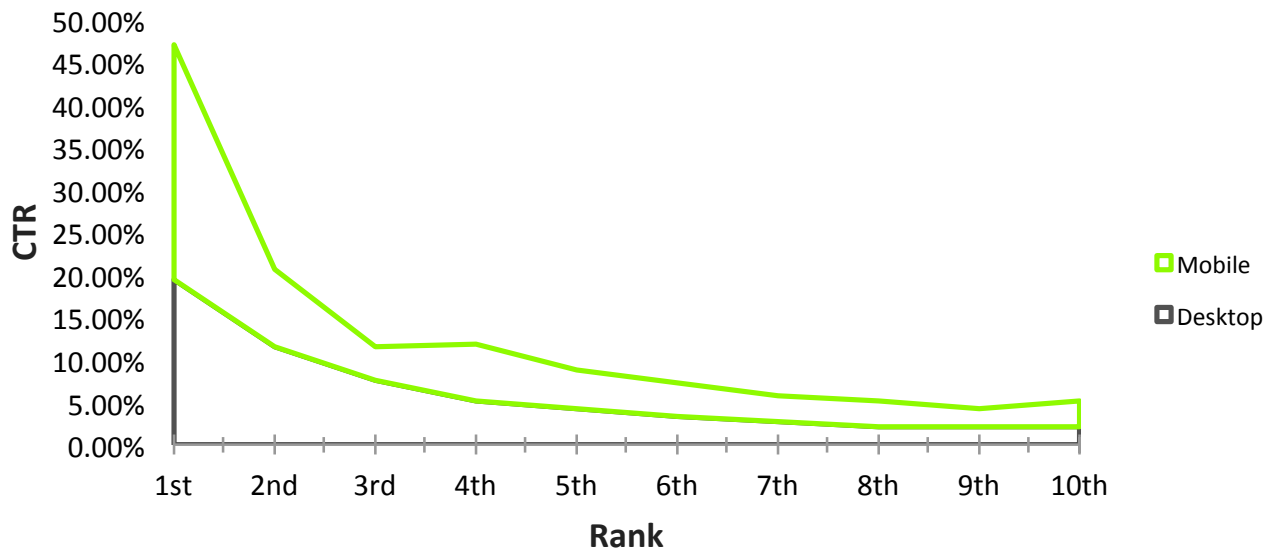
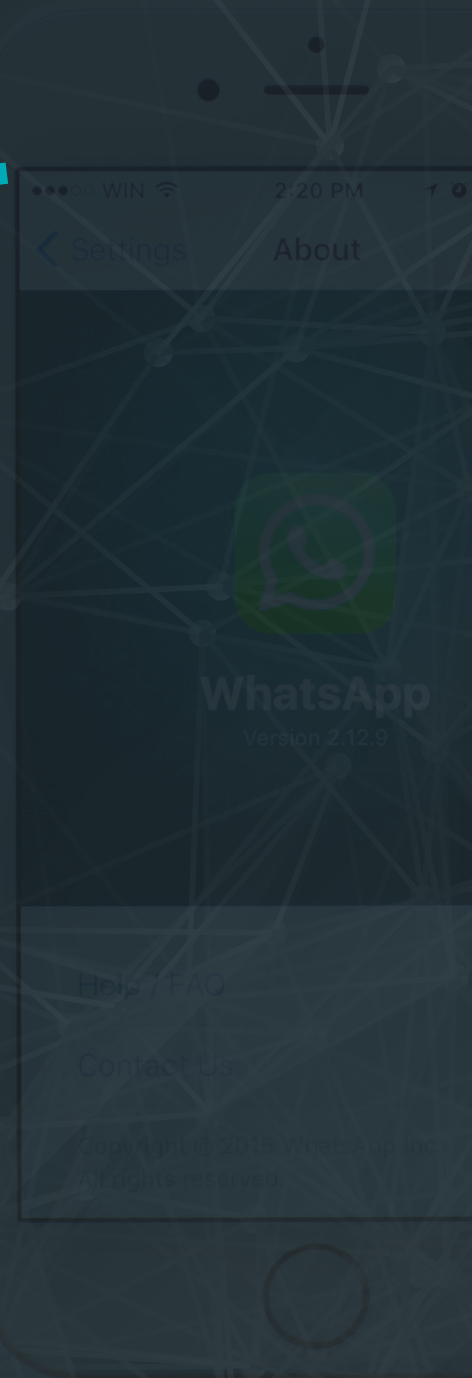## CLICK THROUGH RATE MOBILE
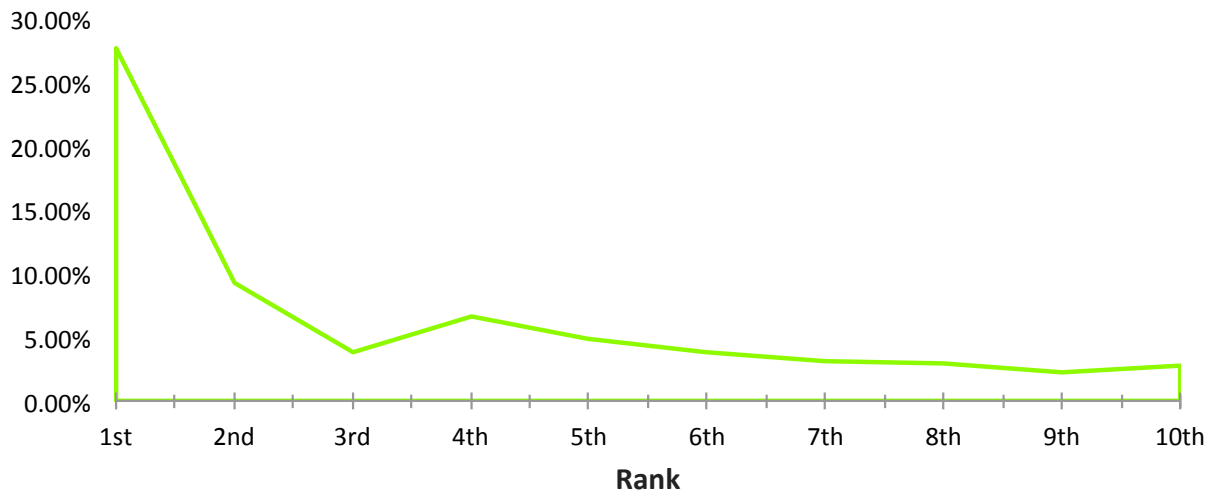
CLICK THROUGH RATE DESKTOP
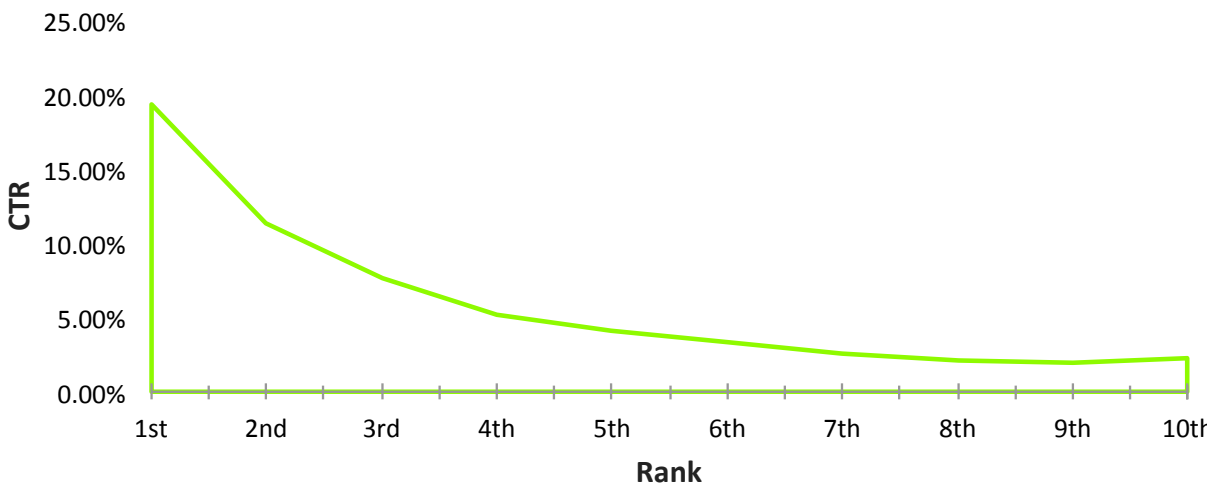
CLICK THROUGH RATE DESKTOP & MOBILE

08

FUTURE
TRENDS

01
ADBLOCKER

Adblocker programs have been around since the mid 2000s but are still causing significant upset in the online advertising industry. In a 2015 study conducted by PageFair and Abobe, it was estimated that ad blockers such as AdBlock, UBlock, and AdBlock Plus cost American publishers $5.8 billion in 2014 revenue and this number is expected to rise to $20.3 billion in 2016.

The report also found that the Google Chrome was the main facilitator of ad blocker growth with a 50% increase in Chrome Adblocker users from 2014 to 2015, with the total users now sitting at 126 million. The industries most affected by ad blocking programs are Gaming (26.5%) and Social Networking (19.1%), the report theorised that this is representative of the technologically savvy nature of Adblocker users.

A 2014 ad blocking study from IAB looked into the reasons people have for using ad blocking programs in the first place. They found that 45% of users feels that ad blocking keeps them protected from viruses, and that the main driver of getting an ad blocking program is the annoying/intrusive nature of ads (35%). The study also found out that 60% of users will actually turn off their ad blocker when requested by a website, the main reason for this being that by turning off the blocker will give the user access to the content they were looking for (45%).

There may be changes in store for ad blocking in the future, though, with innovations coming from both the blockers and the blocked. Apple now allows for ad blocking programs to be downloaded from the app store and ASUS is looking to partner with AdBlock Plus to make their technologies ad free. (The Future of Marketing and The News Independent)

IAB and BILD are testing out new ways to fight ad blocking with different approaches. BILD are taking aim at the consumers with locking down their content which consumers will only be able to access if they turn off their ad blocker or agree to pay a subscription service. (Axel Springer)

Google is looking at introducing a similar program with its Contributor Service which charges consumers a subscription fee to access participating websites ad-free. The service has several subscription options so the more you pay, the less ads you see; but none of the options promise 100% ad blocking. Which websites are included in this program is not clear, however Google states that 'millions' are participating. (Net Imperative)

IAB, however, are looking to change the way advertisers work to hopefully reduce the need for ad blocking services. Their program L.E.A.N. (light, encrypted, ad choice, non-interruptive) is designed to help publishers create more advertisements that will appeal to their readers, rather than drive them away. (Digiday)

02
NATIVE ADVERTISING

Native advertising is still a relatively new and potentially confusing advertising tactic, however its benefits are recognisable and it is quickly becoming a popular choice for brands. Native advertising is essentially sponsored content which is native to the format of the publication on which the content appears. In other words, it looks like standard content from a publisher but it is paid for by a brand. In 2013, IAB identified six advertising formats that fit under the native advertising umbrella which are **Infeed units, Paid search, Promoted listings, In-Ad native, Recommendation widgets, Custom content/ advertorials.**

The custom form of advertising is popular with sites like Buzzfeed and has even appeared on news sites such as *The Guardian* and *The New Yorker*. It's the form that has been drawing the most attention, both good and bad, for its design which enables ads to be transformed into content which doesn't look like an advertisment.

Native advertising is not an entirely radical idea, with sponsored articles or 'advertorials' having been around since the 1950s; however digital media outlets are what have allowed native advertising to become a marketing reality. Being still relatively new, though, a review of the current state of native advertising is valuable to see how it has progressed in the last year. A 2015 report by Pulsepoint comparing native advertising and content marketing, and perceptions between marketers and publishers, provides some good insights into the current state of native advertising. They report on the benefits of native advertising, such as revenue (69% of publishers reported that native advertising brings in revenue for their publication) and brand awareness and engagement (the top two reported benefits of native advertising by brands/agencies), but also acknowledge the current obstacles holding back native advertising from becoming a mainstream marketing tactic.

OBSTACLES TO NATIVE ADVERTISING
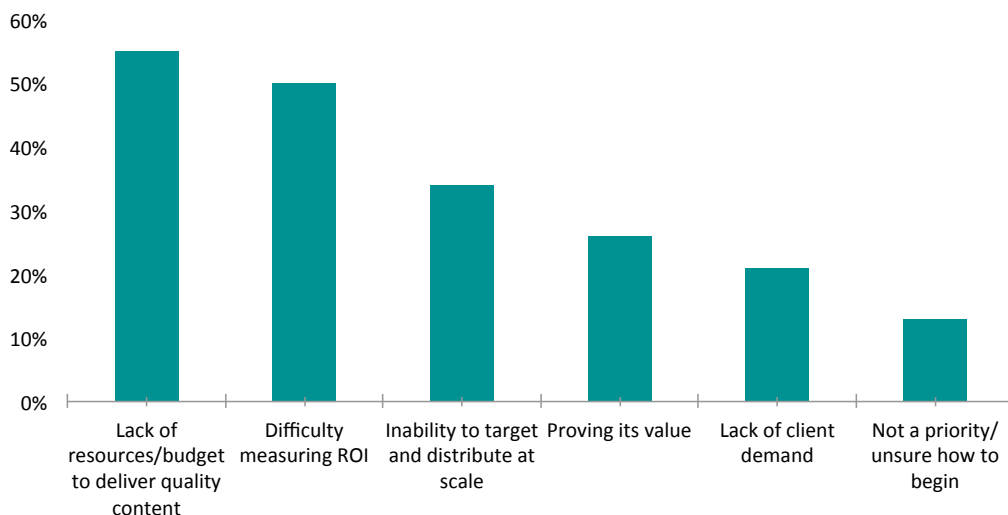
Many other native advertising companies are quick to sing the praises of native advertising; Sharethrough promotes that native **ads provide 18% higher purchase intent and 9% higher brand affinity than banner ads**, and Triple Lift states that on mobile native ads drive 6x higher conversion rates than mobile banner ads and that in-feed sponsored content is seen as the **least intrusive form of online advertising.**

Other companies also have high hopes for the growth of native advertising. Hubspot reported that in 2013 the amount spent on native advertising was $4.7 billion and expects this number to grow to $17.5 billion in the US by 2017. Yahoo has also predicted a large increase in native advertising spend, though significantly lower than Hubspot's, expecting it to reach $9.4 billion in the US by 2018.

As for native advertising in Australia, recent research from the Content Marketing Institute showed that native advertising is the sixth most popular form of online paid advertising, however it was fifth most effective and had grown from 33% effective in 2014 to 37% effective in 2015. Native advertising in Australia has yet to see the amount of hype that it does in the US.

As native advertising is still developing as a marketing tactic there is currently disagreement over whether it is ethical, especially the custom content form; and if it is not ethical, what can make it ethical. The main piece of evidence for the argument that it is not ethical is a controversial article published by *The Atlantic* which praised the leader of scientology, David Miscavige, and was paid for by the Church of Scientology. *The Atlantic* received a large amount of backlash due to this article and it drew a spotlight towards the transparency issue of native advertising. *The Atlantic's* article was not the first of its kind as there have been many other articles run by other online news outlets which follow the same format. In an article published in *Technology Science* by Chris Jay Hoofnagle and Eduard Meleshinsky, they argue that the controversy around the article seemingly stemmed first from the fact that it related to religion, and second from the sponsored nature of the article. This article is also used as a way of defending native advertising due to the fact that even though it received backlash, the main thing is that the readers were not deceived as they recognised it as sponsored. Hoofnagle and Meleshinsky dispute this, however, as they believe that this is not conclusive evidence of the fact that readers can self-regulate, as the reader may not have realised the sponsored nature of the post had it not been a controversial topic in the first place.

The issue with native advertising is transparency; the readers should be able to recognise when they are being advertised to. While a 'sponsored' tag is currently the most prevalent form of clarification, transparency in the content is just as important. This allows a beneficial relationship between advertiser and consumer as the consumer may recognise an advertisement, while still being able to enjoy the content being delivered to them.

03

INFLUENCER MARKETING

The ability of social media to make stars out of so called ordinary people is well known, what is relatively new however is the potential for these internet stars to make money through influencer marketing. Influencer marketing is currently a vague term, as its boundaries are still being defined, but generally speaking it is when brands collaborate with online influencers to create content about a product, which they then share with their large number of followers, with the influencers getting some form of compensation in return. Popular platforms for influencer marketing are sites like YouTube, Facebook, blogging platforms, and Instagram.

Contagious Agency is an Australian influencer marketing agency and they released a report in 2015 which centred on their service and its evolution in Australia. They surveyed 110 Australian marketers and found that the most popular platforms for influencer marketing in Australia were:

Facebook / Instagram / Blogs / YouTube / Google+ / Twitter / Pinterest

While these were the most popular, an American study from Rhythm One reported that the most effective platform for influencer marketing was actually Instagram with a social amplification of 1.77%, the next best being Facebook on 0.21%. Contagious Agency also outlined what marketers offer influencers as incentive for creating content. The majority of marketers used free products and/or money to pay their influencers.

INCENTIVES FOR CONTENT CREATION
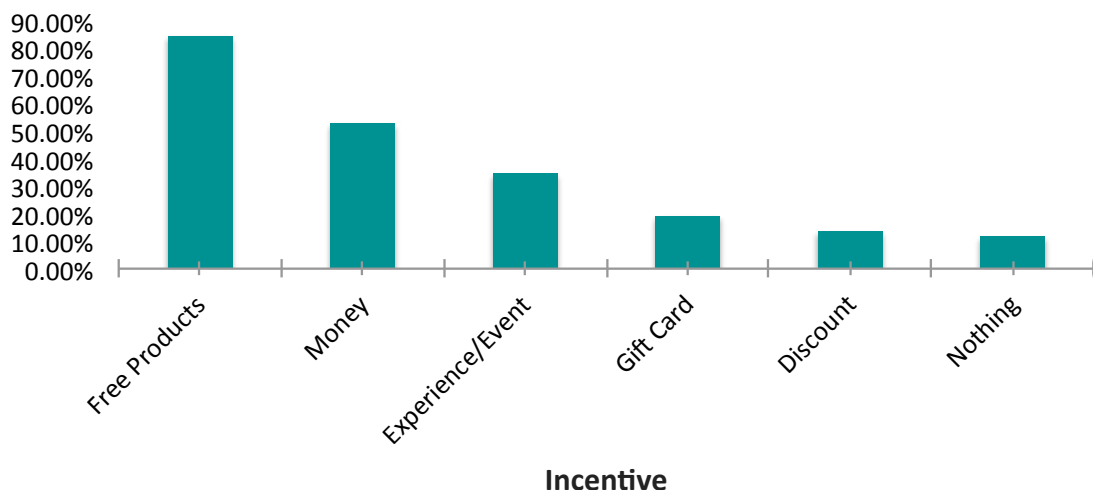
As for whether it works, of the respondents **50% reported that it was effective and 36.3% reported that it was somewhat effective**. As well as this, 68.2% of respondents stated that they were very likely to conduct influencer marketing in the future, **so influencer marketing may be on the rise in the coming year.**

Defy Media produced a report in which they surveyed 13-24 year old Americans on their media consumption habits, as part of this survey they asked questions specifically about the influence of YouTube stars. The survey found that respondents were much more likely to try a product or a brand suggested by a YouTuber (60%) rather than a TV or movie star (46%). They also asked participants to describe YouTubers, descriptions included: 'just like me', 'understands me', 'someone I trust', 'has the best advice', 'genuine', 'likes the same things I do', 'someone I'd like to be'.

Of course there are always risks associated with emerging trends in marketing, especially when there are no boundaries in place for what is acceptable and what is not. Like native advertising, the biggest issue with influencer marketing is transparency. While paid in-feed ads, such as sponsored posts, require some form of mark to indicate that the post is indeed paid for, influencer content does not require this. There are some guidelines in place from the Australian Competition and Consumer Commission (ACCC) but whether these are strictly followed is not clear. Even if the influencer chooses to reveal that the content they provided was paid for, that does not indicate how much power the brand had over what the content said or showed.

One prominent example of backlash against influencer marketing was the 'speaking out' of Essena O'Neil, Australian Instagram influencer. After gathering a significant following of 612,000 on Instagram and accepting products from brands to feature in her posts, she radically changed her stance and edited all of her Instagram posts to point out the staged nature of them. She also released a video to explain her reasoning behind this and pledged retreat from all social media. There was a significant amount of media coverage surrounding this incident, with the perils of social media and the unscrupulous nature of brands being much discussed. Despite whether her claims surrounding social media and influencer marketing related to all prominent social media figures are correct or not, the damage had already been done with many now aware of the transparency issue of influencer marketing. (The Guardian)

While there are benefits to influencer marketing, the practice is still relatively new and may take a while to become properly regulated and monitored so that marketers may avoid the aforementioned backlash and influencers can avoid losing the trust of their audiences.

09

TOP CAMPAIGNS OF 2015

DALLAS PETS ALIVE AND DIESTE

- Adoptable Trends -

This campaign was an impressive idea that tapped into the idea of cultural relevance to increase visibility. The idea was relatively simple, to rename the dogs available for adoption on their site to trending topics and create paid search engine results with these names to increase their visibility and their chances of being adopted. They also introduced the dogs via instagram and YouTube in an effort to generate conversation about the idea. Alongside giving trending topics a social purpose, the campaign yielded positive results for the organisation and their dogs.

They achieved their goal of increased visibility with a reported 98% increase in traffic to their site and a 150% increase in click through rates on their paid search engine advertisements. Their social media saw a 112% increase in engagement per post on Twitter and on Instagram, however their YouTube video did not receive much attention - only driving 6 subscriptions and 24 shares. Arguably their most important result was the increase in adoptions the organisation saw that year, which was four times more than their adoptions from the previous year. The campaign also picked up a couple of awards for their creativity, winning gold for Search Marketing from 2015 IAB MIXX Awards, and bronze for Engagement/ Experiential from CLIO Awards 2015.
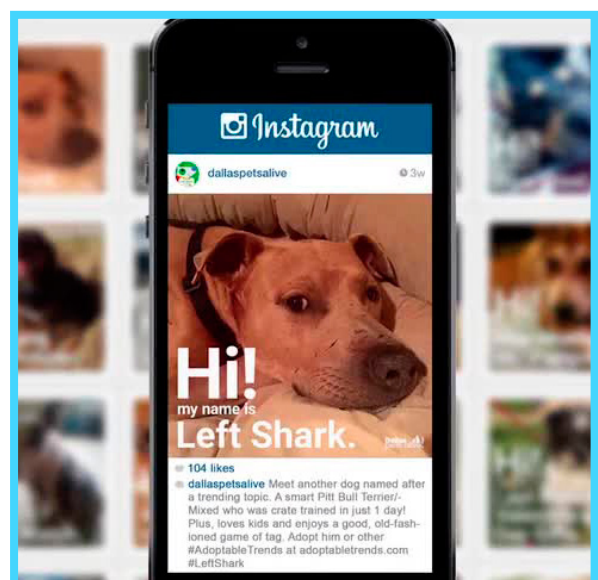
IKEA CANADA AND JUNGLE MEDIA

#sharethebathroom

IKEA Canada's #sharethebathroom campaign was a unique idea which attempted to bring IKEA advertising into the bathroom routine. This was achieved through the creation of hyper-personalised banner ads which were directly targeted to specific individuals and were created by consumers. IKEA invited people to create banner ads with a specific message to someone else in their household which would then be sent to them using the IP Address from the consumer that created the banner. People were encouraged to add an image to their banner which increased the visibility of their bathroom products. The campaign was promoted through Facebook and Twitter along with standard banner ads. By turning a usually overlooked advertising medium into something extremely personal, they increased the impact of their banner ads.

The campaign did produce some fairly impressive results, too, as over 17,000 Canadians visited the ad creation page, which resulted in over 800,000 custom banner ads created. As for sales, IKEA Canada saw a 12% increase in store sales and a 34% increase in online sales. It also picked up a a gold award for Best Use of Content from the 2015 MIAs and a bronze award for Innovative Use of Creative Optimization Ad Technology from the 2015 IAB MIXX Awards.

Who needs to freshen up on how to #ShareTheBathroom?

To get started, we'll need your first name and theirs.

Your first name

Their first name

→ NEXT

DOMINO'S AND CRISPIN PORTER & BOGUSKY

- Emoji Ordering -

In order to promote their new emoji ordering system, Domino's took to social media to produce some cryptic messages leading up to the announcement. On Twitter @dominos created a series of tweets composed almost entirely of pizza emojis in an attempt to spark conversation and foreshadow the launch of the ordering system. The system also garnered a significant amount of mainstream media coverage, appearing on Jimmy Fallon, Forbes, and the Today Show. After the launch of the system they followed up with video advertisements highlighting the simplicity of the service and an emoji literacy card pack in an attempt to bring the service to an older generation.

Their cryptic messages made an impact, with Domino's receiving over 500 signups to the system on the day of the launch. Their campaign won the Grand Clio for Social Media from CLIO Awards 2015, and the ordering system took home the Titanium Grand Prix for the Most Breakthrough Idea of the Year from Cannes Lions 2015. Domino's use of a specific social network to target a select audience and the subsequent mainstream media coverage ensured that the product was a success on launch day.
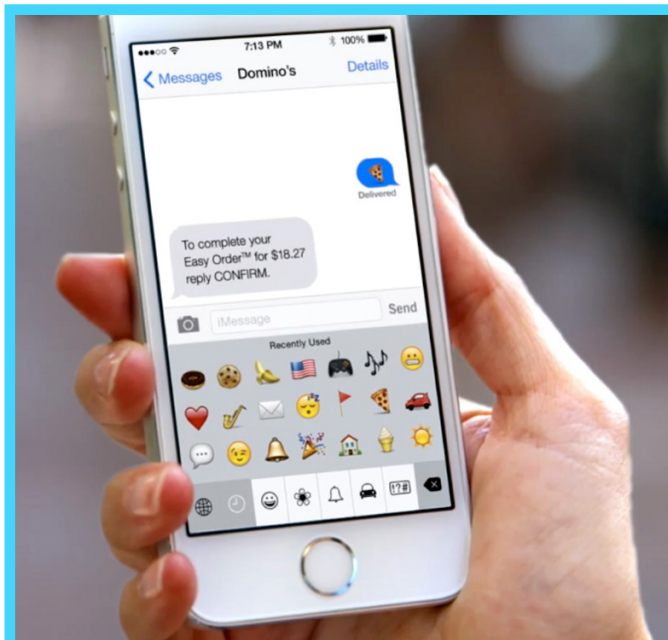
BERINGER AND MURAD OSMANN

#betterbeckons

To enhance their newly created instagram presence, Beringer enlisted the help of popular photographer and instagrammer Murad Osmann to create a series of six photos using Osmann's unique and recognised style. Osmann's series 'Follow Me To' gained him popularity on Instagram where he now has over 3.8 million followers and his photos consistently receive hundreds of thousands of likes. The photos created by Osmann for Beringer are currently posted on both Osmann's and Beringer's Instagram accounts with 5 out of 6 photos having been posted so far. The Beringer account also has candid behind the scenes shots which do not appear on Osmann's account - these photos serve as an incentive for followers of Osmann to also follow Beringer.

The collaboration between Beringer and Osmann is an example of the growing trend of influencer marketing; Beringer is hoping to share in a part of Osmann's audience and wants Osmann to bring their product to his audience in a way that his followers are familiar with. The campaign is currently ongoing so the final results of the campaign are not visible yet, however the Instagram metrics are a good indication of the success so far. The first five images of the series currently have a cumulative 'like' total of over 2,159,000 and a 'comment' total of over 11,387 on Osmann's page. Osmann is currently averaging around 431,800 likes and 2,277 comments per post.
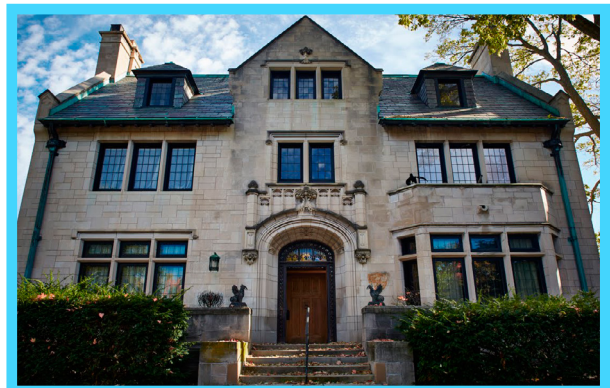
TARGET

- House on the Hallow Hill -

For Halloween, Target tried out a new format on YouTube with a 360 degree interactive house tour filled with Target Halloween products. The series of six videos were posted to Target's YouTube channel and consisted of one intro and one outro video and four 360 degree interactive rooms. The videos show Target's Halloween collection in a creative setting and invites the viewer to complete an object by going through all the rooms. The videos begin with a raven stealing the viewers' phone and invites the viewer to traverse the house to get it back, the real prize at the end however was a 10% discount to those who made it to the last video. In order to integrate the shoppers' experience with the viewing experience, Target set up curated lists for each room and linked those in annotations within the videos. To promote the campaign, Target used Facebook, Twitter, Pinterest, and Instagram, and even worked with influencers The Holderness Family (over 168,000 subscriber on YouTube) and Joy Cho (12.9 million Pinterest followers).

Target has not released any specific sales benefits from the campaign but their YouTube videos were received fairly well. The first video in the series received over 300,000 views in the first five days and now sits at over 700,000 views; it has also so far driven 25 subscriptions and 443 shares on social media. The video produced with The Holderness Family has received over 363,000 views and the collaborative Pinterest page by Joy Cho and Target now has over 874,000 followers. Trying out a new format is also a risk and, unfortunately, the 360 YouTube system does not work across all platforms yet, and this would have reduced the potential audience. However, with the average view count for the videos now sitting at over 479,000, it is evident that they did reach a significant audience.

10

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