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The Future of Marketing

How Better Data Will Reinvent Marketing



Stephen Kraus, Ph.D.
Head of Digital Insights
Jumpshot Inc.

“The Principle of the Drunkard’s Search”

See Also: The Streetlight Effect ~ Observational Bias ~ Vanity Metrics



Beware the Siren Songs of Views & Impressions

"I went to the bank the other day and tried to deposit some views, but they told me they only take revenue."

Oren Katzeff, the head of Conde Nast Entertainment

"Viewability standards" and "bot traffic":
Views only seemed easy to define and measure

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The Siren Song Of Easy Measurement Isn't New



- ✓ Demographics
- ✓ Self-reports
- ✓ Purchase Intent
- ✓ Voter intent (popular vote)

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Availability & More Block Data-Driven Decision-Making

Too often, data are not…

Available

84%

lack insights into behavior on eCommerce sites*

Accessible

Data not distributed throughout organizations

Integrated

Different metrics, different systems

Interpreted

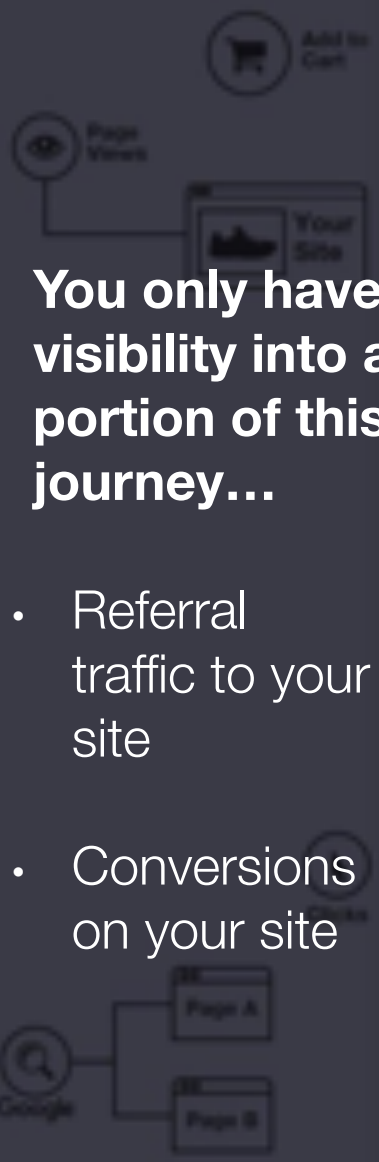
“Drowning in data, but starving for insights”

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* Jumpshot survey of B2B decision-makers

On Your Site

Across the Web



You only have visibility into a portion of this journey…

- Referral traffic to your site
- Conversions on your site

But you have zero insight into:

Where else your customers are buying

amazon

Walmart

How your competition is doing

SONY

BOSE

What marketing tactics are working for your competition

$

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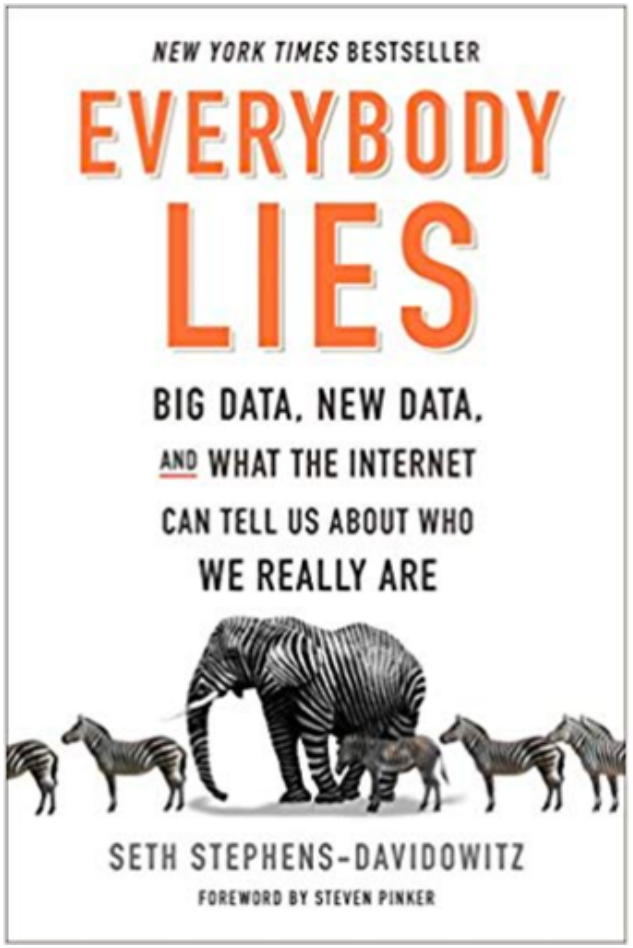
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What if you could see…

- Key digital behaviors
- Tens of millions of devices
- Anonymized & aggregated

You Could Understand Consumers Based on Behavior



- **What marketers want to know exceeds what consumers…**
  - Will tell us (sensitive topics)
  - Can tell us (tech use, expenditures, path-to-purchase)
- **Digital behavior (and search) reveal attitudes, aspirations, anxieties**

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Deepen Connections with Behavioral Insights

Viewers of…



Over-index on…

amazon instant video



amazon



Spotify



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Case Study: A Behavioral Profile of Baby Dove Buyers

1 Take their holistic health very seriously.



1.5X more likely to search for vitamins



5X more likely to search for diets and health conditions/disorders

2 Stream videos and purchase books that reflect their real-life experiences.



2x-4x more likely to stream Netflix genres, including comedy sitcoms and stand-up centered around pregnancy



Purchase self-help books about relationships

3 Expect to chronicle their child's development.



4x more likely to visit photo album sites (ex: Shutterfly and Walgreens)

4 Stay current on pop culture.



4X more likely to search for recent celebrity news



Watch makeup tutorials on YouTube

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What would you see with full digital visibility?
Behavior
Behind walled gardens

What Happens on Google? A Lot of Branded Search



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Top 10 Search Terms on Google in Past 90 Days (US). Source: Google
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Consumers Seek Personal Recommendations

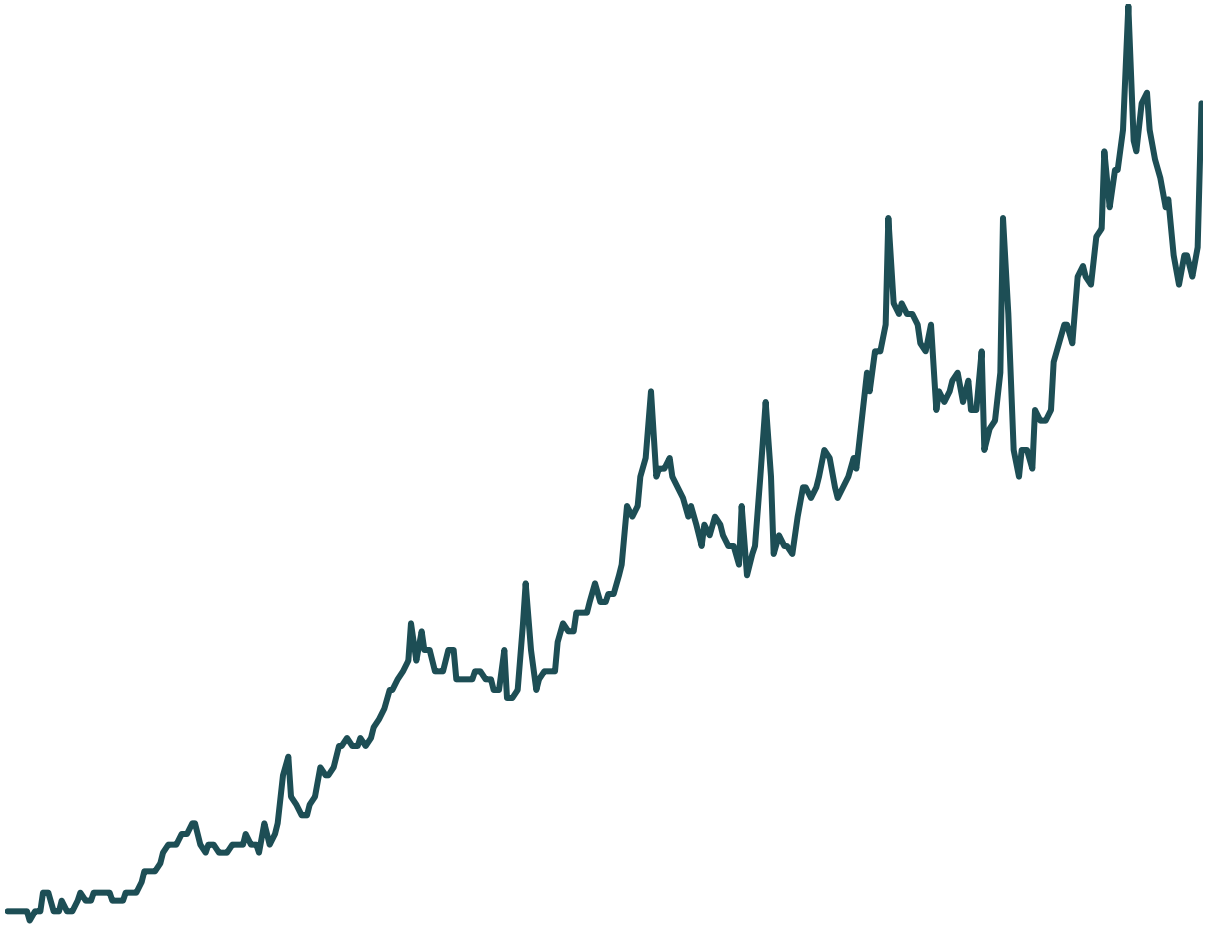
Local:
near me, wait times

Personal:
for me, should I, can I, can I buy

Immediate:
open now, same day shipping, today, tonight

Conversational:
natural language, asking questions

Searches for “Near Me” (past 5 years)

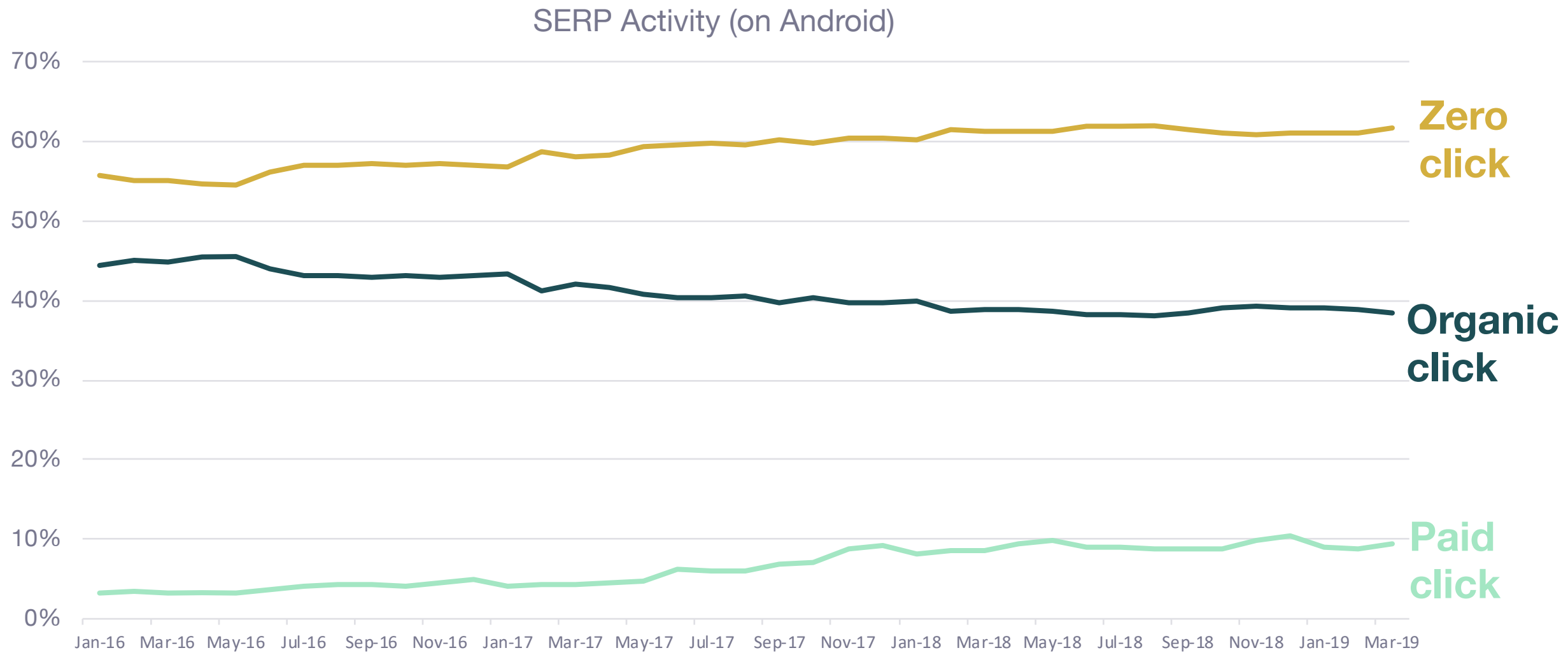


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Source: Jumpshot analysis of Google data

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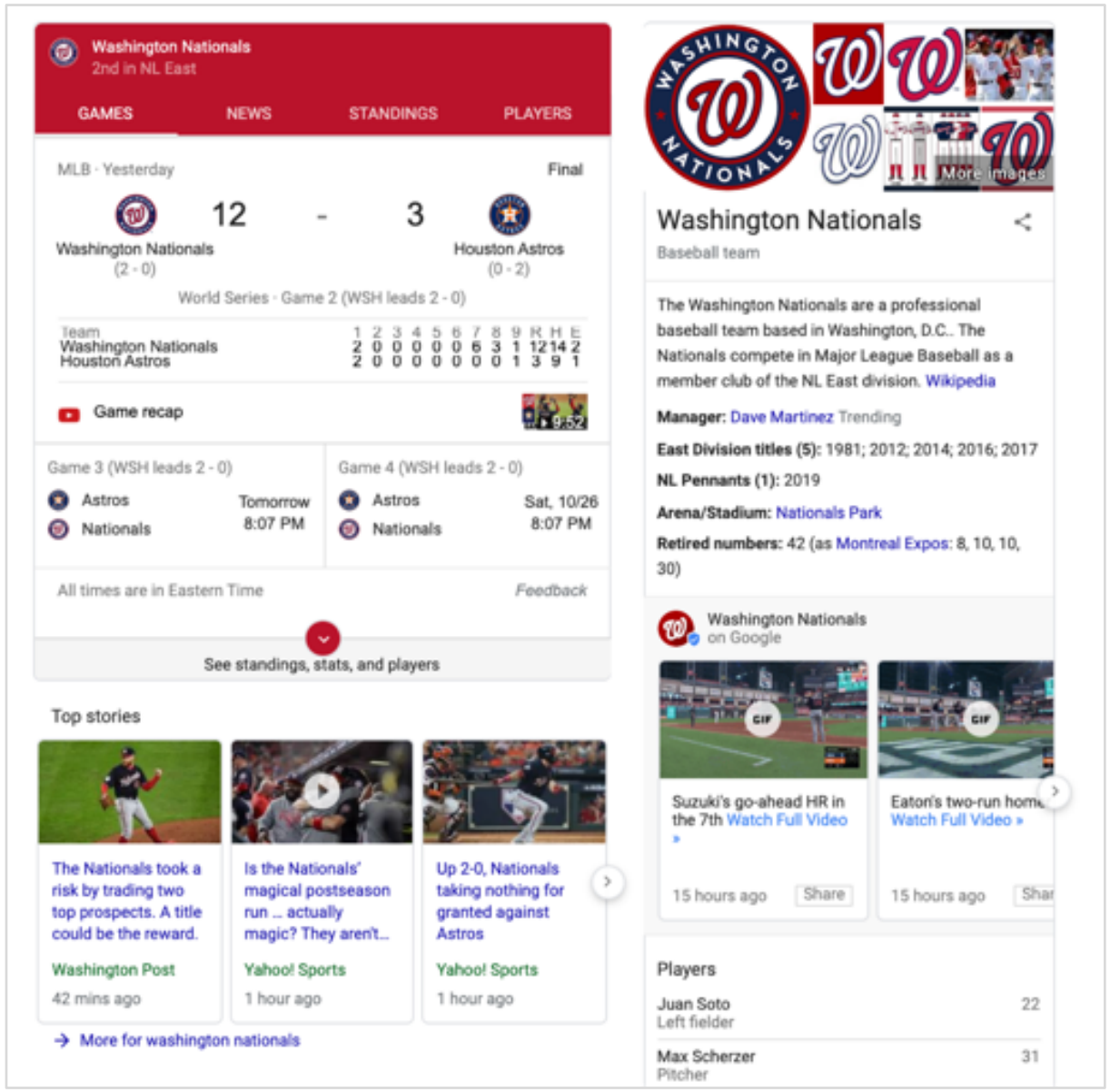
Most Mobile Searches Don’t Result in a Click



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Search Engine Results Pages (SERPs) Are Busier



SERPs features (Moz)

- ↑ Knowledge Panels
- ↑ Featured Snippets
- ↑ People Also Ask
- ↑ Shopping
- ↑ Local
- ↑ Video

Consumer SERP behavior

- ↑ No clicks
- ↑ Clicks on paid links
- ↓ Clicks on organic links

Somehow, These SERPs Seemed Very Familiar…



Behind Walled Gardens: Amazon's Distinctive Search



54%

of product-related search happens on Amazon



90%

of Amazon product views start with search



11%

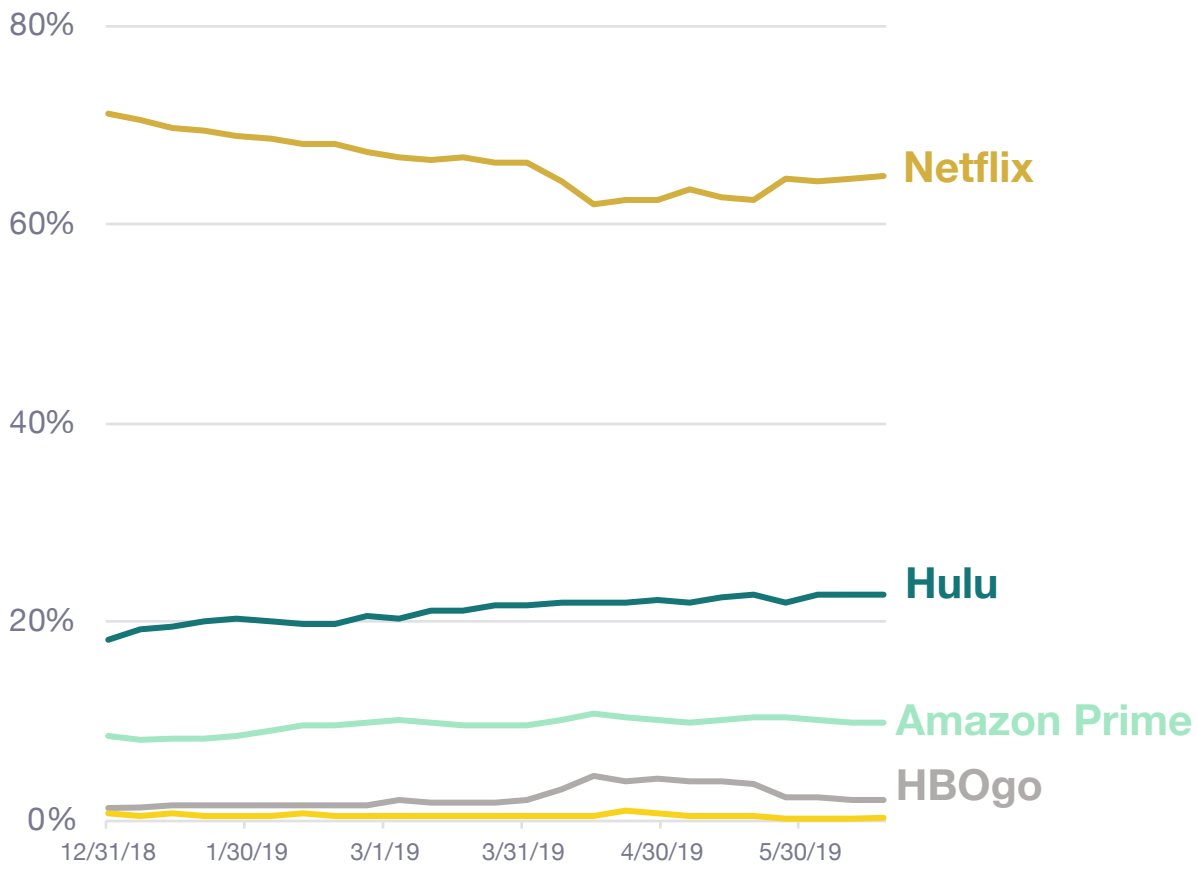
of Amazon product views are sponsored

Top Terms on Amazon: laptop, Nintendo switch, Fire Stick, wireless earbuds, headphones

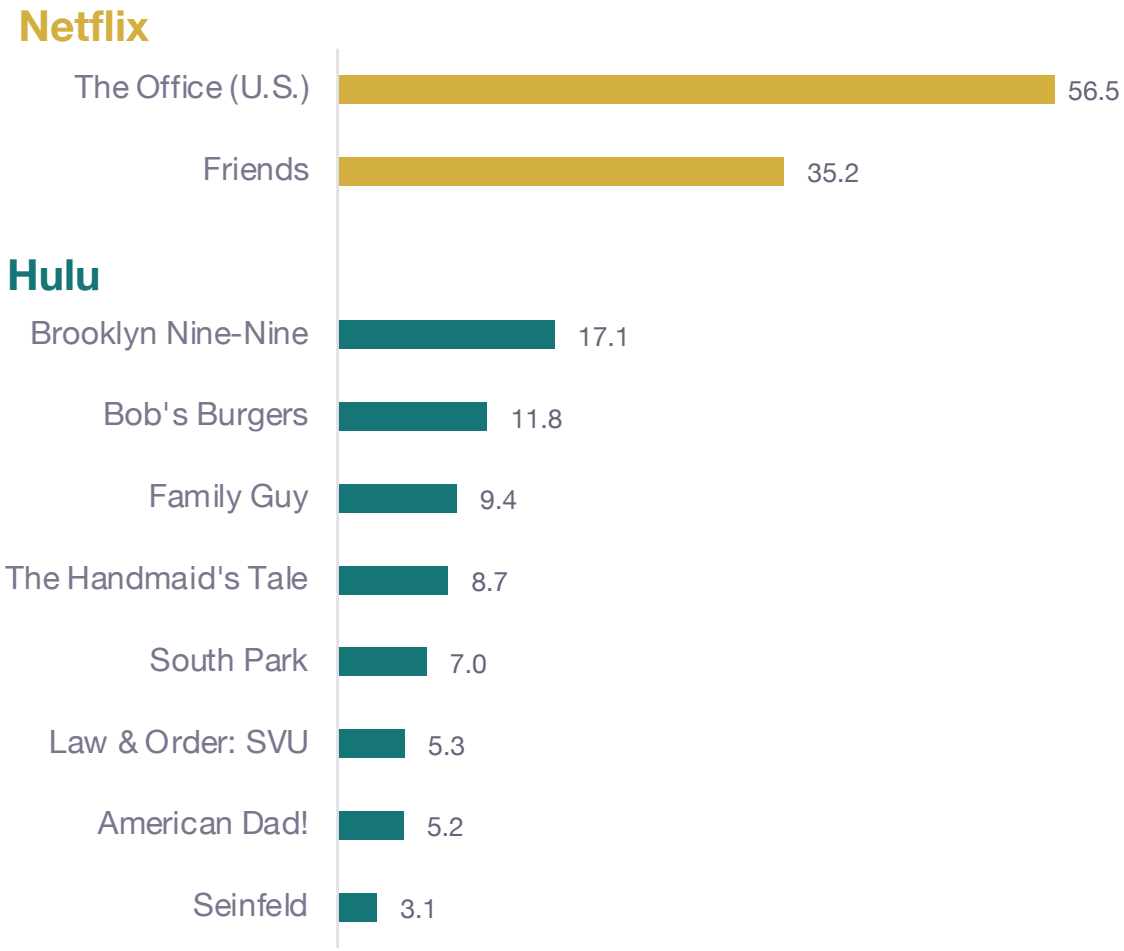
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Behind Walled Gardens: Inside Netflix's Vulnerability

Share of Streaming Views



Views of Selected Titles (Jan-Aug 2019)



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Desktop views shown jumpshot

What would you see with full digital visibility?

- Behavior
- Behind walled gardens
- Paths to purchase



Using Path-To-Purchase To Quantify Influencer ROI



80MM

product views on Amazon from Top 1,000 YouTube influencers in 2018



2.7%

Average conversion rate (vs. 0.5% from YouTube ads)



75%

of purchases did not come via the influencer's link

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Publishers Are Using eCommerce-Based Optimization

Exposure
Consumers exposed to a digital ad

Measurement
Downstream purchases across sites

Optimization
Fine-tune advertising/ content fit

A major e-commrce site increased purchasees **372%** towards beauty, business, careers and technology categories

"The data integration has proven invaluable. Many of our advertisers are seeing campaign uplifts of over 60 percent."



Karthic Bala
Head of Data Strategy

CONDÉ NAST

Nike Benefits from Branded & Marketplace Channels

Nike.com
45%

- Ave price: $114
- 18% of visitors also visit Amazon
- Circuitous customer journey



Marketplaces
55%

- Ave price: $82
- 15% of visitors also visit Nike.com
- Simple path to purchase

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Summing Up…



Some Tactical Suggestions: Thriving Among Giants



Discover

- No dominator, so diversify upstream
- Measure comprehensively downstream



Search

- Branding is the key to being found
- Leverage “barnacle” & “on-SERP” SEO
- Mine search for intent, funnel position, unmet needs



Shop

- Choose: utilitarian or branded
- Innovate in brand/retailer partnerships

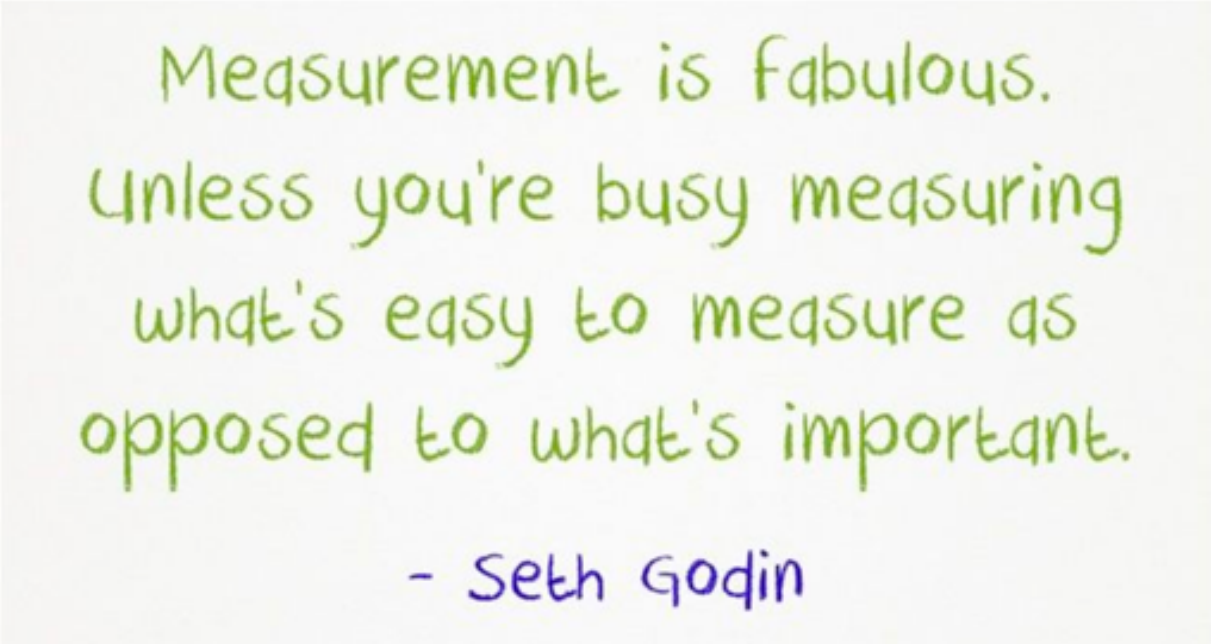


Buy

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Toward a Transaction-Based Ecosystem

- ✓ Measurement defines our methods
- ✓ The drunkard's search has kept digital from fulfilling its promise
- ✓ Data of full depth & breadth enable a transaction-based ecosystem



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Questions?

Every search. Every click. Every buy.
On every site.

Jumpshot delivers digital intelligence from within the Internet's most valuable walled gardens.

Our clients include:

Google CONDÉ NAST KANTAR

REVLON Microsoft Nestlé PURINA.



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