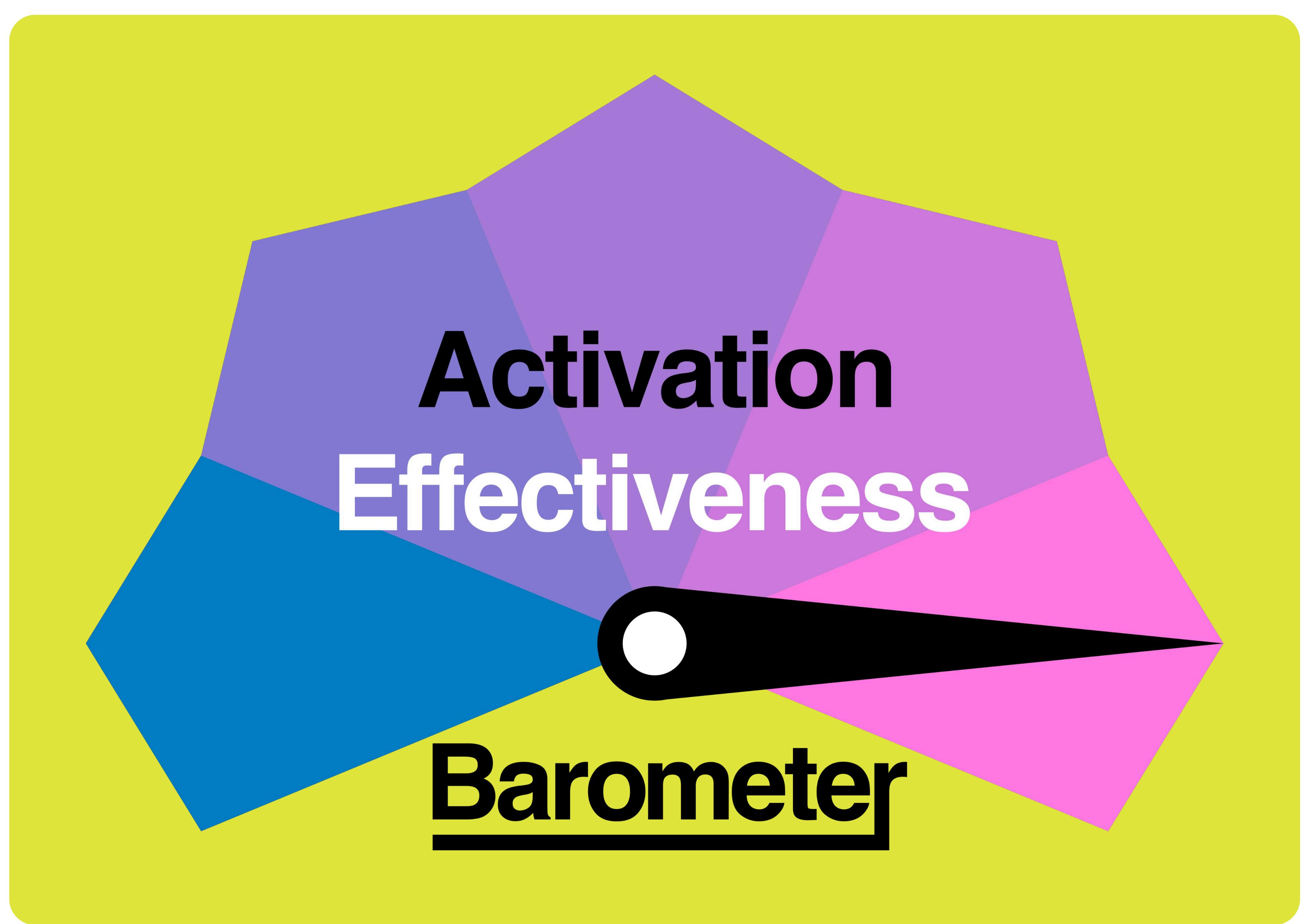


Curious Nation: Translating Creativity into Measurable Impact

Benchmarking how below-the-line marketing is measured, valued, and prioritised across Australia and New Zealand

curiousnation | **ideally**

In partnership with



**Activation
Effectiveness**

Barometer

Millions Spent. Patchy Proof.

Marketers across Australia and New Zealand are pouring millions into below-the-line (BTL) activations every year, from sampling and sponsorships to retail theatre, events, and digital extensions. Yet despite all this investment, most marketers still can't confidently say what works.

The inaugural Activation Effectiveness Barometer, developed by Curious Nation in partnership with Ideally, sets out to change that.

Through a quantitative online survey of 87 senior marketing specialists across Australia and New Zealand, 80% of whom sit in CMO, marketing director or head roles at some of Australia and New Zealand's biggest brands, this benchmark explores how BTL activations are measured, valued, and prioritised. What it reveals is a landscape that is strong in belief and positivity but weak in proof: high conviction in the power of activation, but low confidence in its measurement.

2% **5%**

of marketers say they're very confident in measuring ROI

feel the same about brand impact.

Even fewer have a consistent, organisation-wide approach to BTL measurement.

"For too long, activation has been undervalued because it hasn't spoken the same measurement language as other parts of the marketing mix. The Activation Effectiveness Barometer is about changing that narrative and for the first time in Australasia we now have a clearer view of the pressure points marketers face in BTL activation and measurement. The good news is that solutions to many of the issues highlighted are available, but a knowledge gap means they are not understood."

Meredith Cranmer,
Co-Founder & Managing Director,
Curious Nation

The Measurement Maturity Gap

Confidence is low. Consistency is lower.

Among CMOs and Heads of Marketing, only 44% feel confident measuring ROI for BTL activations. Confidence drops further among junior-to-director level marketers, with just 36% saying the same.

When it comes to brand impact, confidence plummets again to 30% among CMOs and 46% among mid-level leaders. Only 2% describe themselves as very confident in measuring ROI and just 5% for brand impact.

Measurement inconsistency compounds the issue:

9% **45%**

of respondents describe their metrics as very consistent

say somewhat consistent

>1/3

admit to being somewhat or very inconsistent

Marketers cite attribution, data fragmentation, and siloed reporting as major barriers.

“The hardest part about proving the value of BTL activations? It's connecting the dots between someone experiencing our brand and them actually buying it. Tracking the basics isn't the problem. We can see who showed up, how engaged they were, what they posted on social.

That part's straightforward. The real challenge is this: Can I prove that the person who attended our experiential event in January is the same person who bought in March?

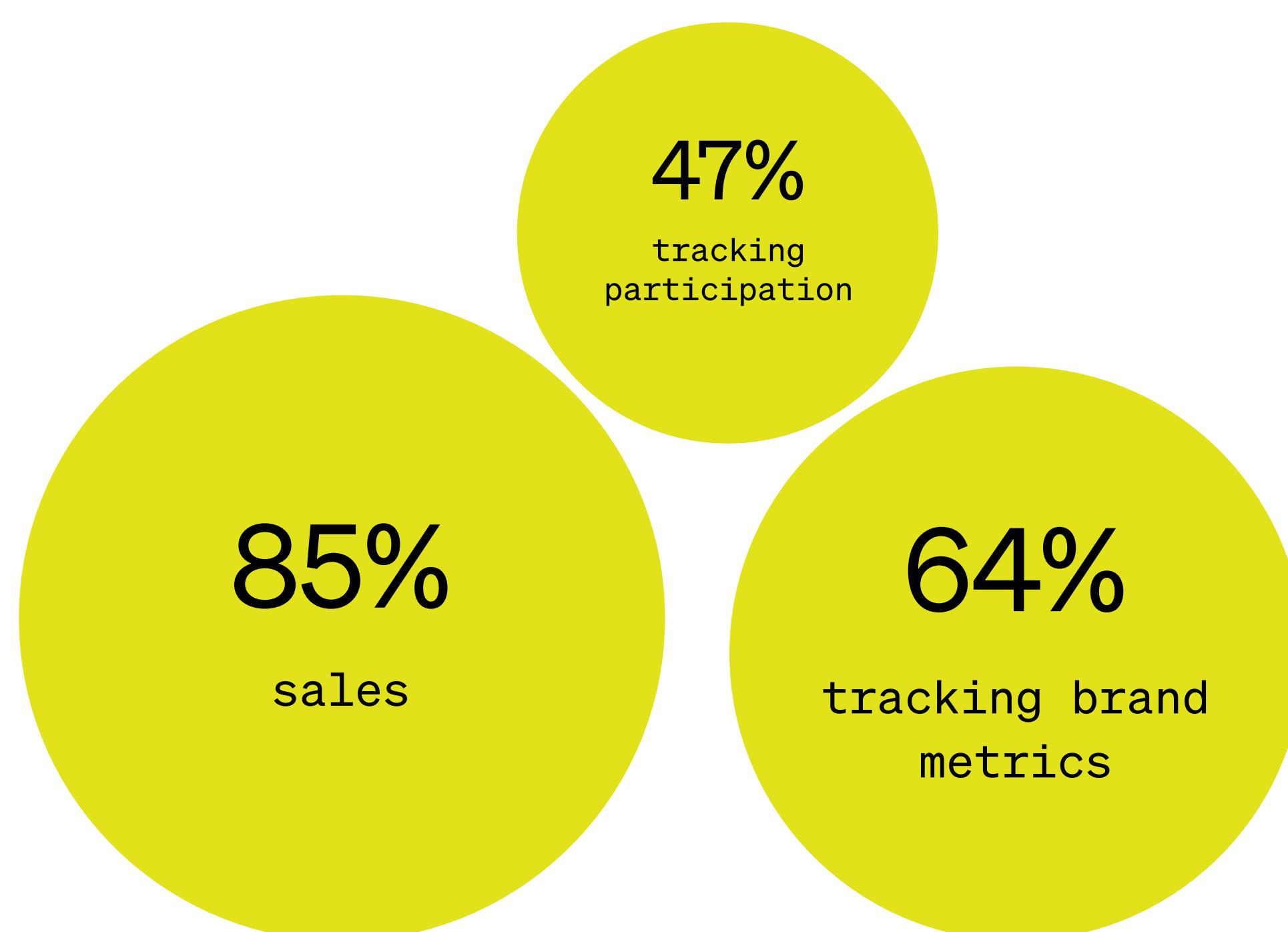
Right now, I can't. Our data doesn't talk to each other. And here's the bigger problem. Even when I see sales increase after an activation, I can't definitively say we created new shoppers versus just converting people who were already going to buy.”

Senior marketer

Proof Over Promise

We measure what's easy, not what matters.

When asked what metrics they use to assess success, 85% of marketers said sales, followed by 64% tracking brand metrics, and 47% tracking participation (e.g., sign-ups, engagement).



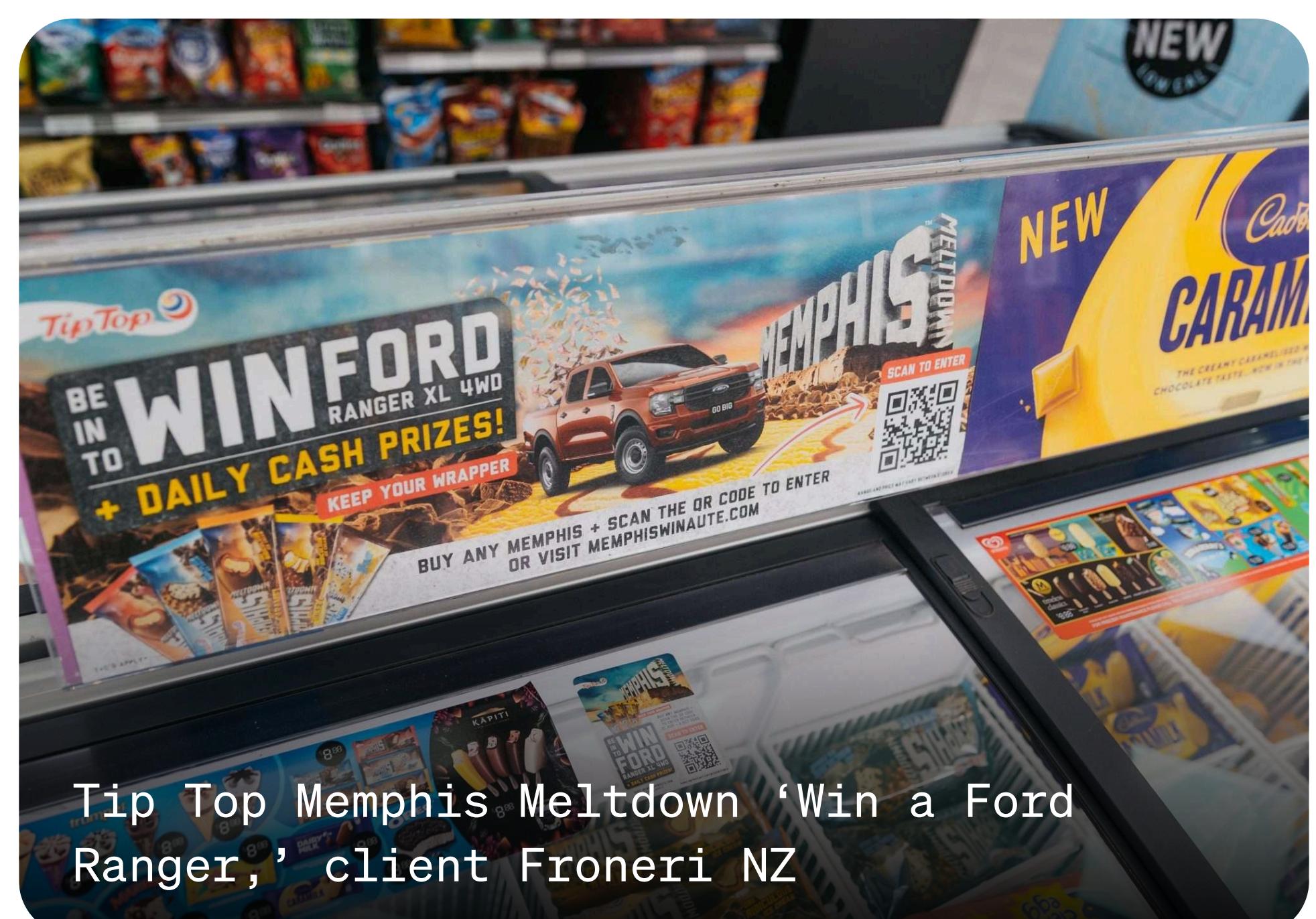
This heavy reliance on short-term commercial indicators suggests a gap in how marketers measure lasting influence, as well as how activations shape brand equity, consideration, or behaviour change over time.

"We have pretty rigorous measurements, however nothing is consistent! There is a need for a consistent framework"



Short-term proof has become the default because it's easy to measure and easy to defend. But it tells only part of the story.

Proof means more than a sales spike. It's about understanding what people think, feel, and do, and how your activation changes that. We're helping brands link the emotional and the commercial to see the real picture of effectiveness.



The Experience Paradox

The channel marketers believe in most is the one they understand least.

Experiential activations — events, pop-ups, and immersive brand experiences — are among the most invested-in BTL levers,

55%

of marketers allocating substantial budgets.

They're also seen as one of the strongest drivers of brand impact (22%), second only to sponsorship (23%).

22%

brand impact

23%
sponsorship

But here's the paradox: Experiential is considered the hardest to measure. Nearly a third of marketers identified it as their primary measurement challenge. Confidence in its effectiveness remains high.

43%

of marketers plan to increase investment in experiential next year

24%

cited an experiential event as their most successful activation in recent memory.



This belief-versus-proof tension defines today's activation landscape. Marketers feel experiential works, but lack the tools, benchmarks, and data to prove it.

Experience is the heartbeat of activation, it's how people feel a brand. But too often, measurement is an afterthought. We believe in designing measurement into the experience itself, so emotion and evidence move together.

Retail Media with Rigour

Retail is the new media, but strategy hasn't caught up.

75%

of marketers say retail media and in-store activation are their biggest BTL investments

with 32% naming them the top ROI drivers. Digital and social amplification follow closely at 64%, cited by 24% as strong ROI channels.

By contrast, sponsorship (23%) and experiential (22%) are viewed as stronger for brand impact than direct ROI.

This divergence between ROI-driven levers (retail, digital) and brand-driven levers (experiential, sponsorship) reveals a broader truth: marketers are optimising for what they can measure, not necessarily what creates long-term brand growth.

Retail media, in particular, is booming, fuelled by retailer-owned networks, shopper data, and the promise of precision. But without rigorous path-to-purchase planning and channel integration, much of that investment risks becoming siloed or transactional.

Retail media has incredible potential, but it needs strategy behind it, not just spend. We bring full-journey thinking to retail activations, ensuring every dollar works harder from shelf to screen.

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- EVERY CASE WINS -

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MADE WITH CRUSHED LEMONS
4.5% VOL
10x375 mL CANS
GROSS WEIGHT APPROX. 4.0 kg

CARLTON DRY
LOWER CARB
ULTRA SMOOTH LOW BITTERNESS

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SCAN FOR MORE

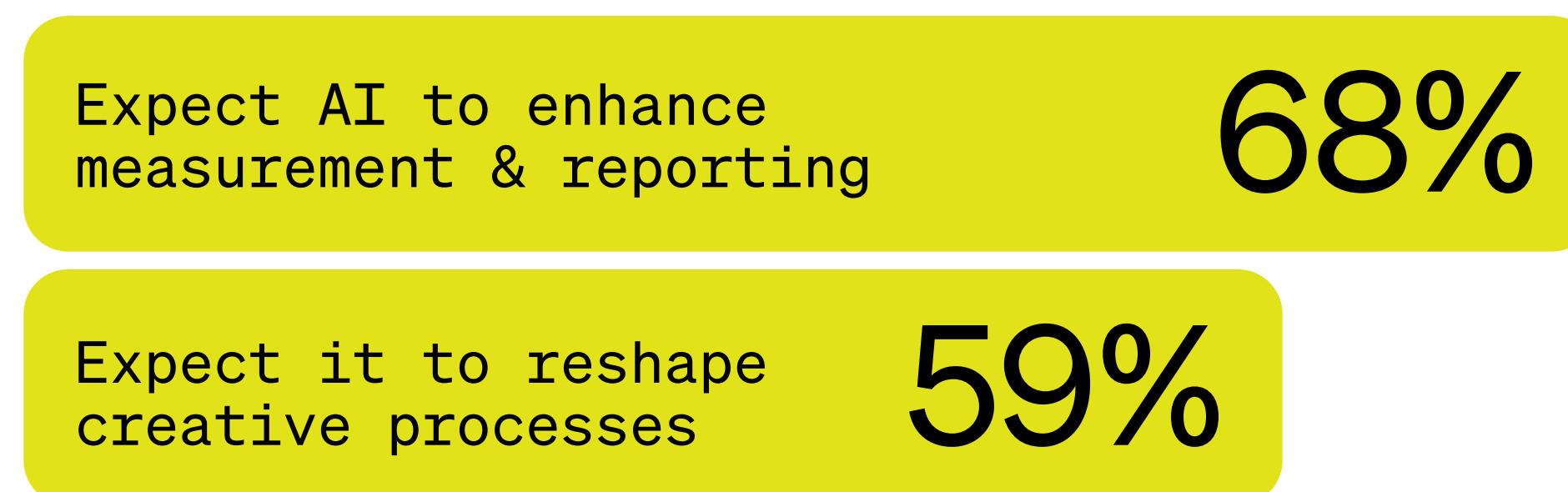
Aus. (excl. NT) res. 18+ only. Starts 3/2/25 9am, AEST & ends 2/6/25 11:59pm AEST ("Promotional Period"). To enter, during the Promotional Period: a) purchase a specially marked carton of either Hard Rated (24 x cans) or Carlton Dry (24 x bottles) (each a "Carton"), from any Liquorland, First Choice or Vintage Cellar liquor store within the QR code found on the Carton and fully complete and submit the online entry form with their personal details (Queens Bridge Street, Southport, QLD 4215, Australia) via drinkwise.org.au (the "Entry Form") b) scan the QR code found on the Carton and fully complete and submit the online entry form with their personal details (Queens Bridge Street, Southport, QLD 4215, Australia) via drinkwise.org.au (the "Entry Form"). Instant Win Prizes: up to 4000 x \$25 Coles e-gift card, up to 8000 x \$5 Coles e-gift card, up to 10,000 x \$5 Coles e-gift card. Promoter: Carlton & United Breweries Pty Ltd ABN 76 004 056 106, 58-60 Boundary Street, Southport, QLD 4215, Australia. © 2025 Carlton & United Breweries Pty Ltd. All rights reserved. Choose to DrinkWise. ID25

'Feed Your Thirst', client Asahi Beverages AU

The AI Effect

Artificial intelligence, real opportunity.

If 2024 was the year of AI buzz, 2025 is the year of implementation. Across the industry, marketers see AI's potential to improve both measurement and creative development in BTL:



The opportunity lies in how AI can bring speed, consistency, and depth to how marketers evaluate activations — from smarter data modelling and sentiment analysis to more adaptive campaign optimisation.

**It's not about replacing human intuition;
it's about augmenting it.**

AI doesn't replace curiosity, it amplifies it. Working with partners like Ideally and Tracksuit, we're exploring how intelligence and imagination can combine to decode what really drives effectiveness.

The Outlook: Cautious Optimism

Despite the measurement challenges, marketers remain bullish on BTL.

60%

expect their activation budgets to remain stable heading into 2026

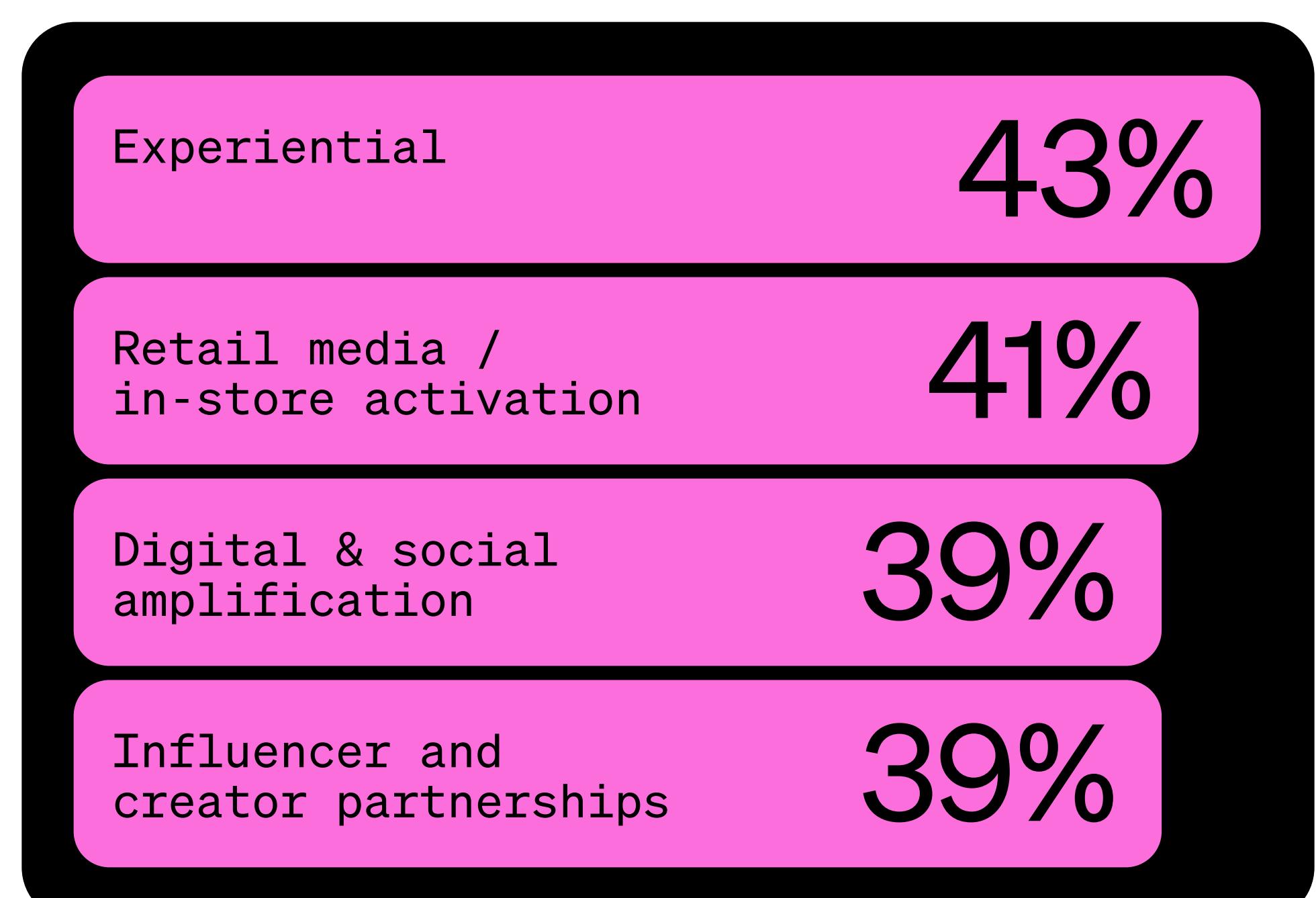
28%  13% 

predict increases

forecast decreases

This paints a picture of steady investment with selective acceleration, especially toward channels that bring brands closer to people, both physically and digitally.

The areas most likely to see increased spend next year are:



Confidence in measurement may be low, but confidence in the power of activation is growing. Marketers aren't pulling back. They're doubling down, they just want better proof. Our role is to help them get it.

Closing Insight: From Fragmentation to Framework

The Activation Effectiveness Barometer exposes the fragmentation that still defines the activation space: different metrics, inconsistent frameworks, and a disconnect between creative intuition and commercial rigour.

But it also shows momentum. Marketers want to measure better. They're hungry for benchmarks, best practices, and tools that help them prove what they already believe... that great activations drive both emotion and performance.

“This isn’t about finding a silver bullet. It’s about building a shared language of effectiveness, one that recognises the value of creativity and the importance of accountability.”

Meredith Cranmer, Curious Nation

The Activation Effectiveness Barometer will become an annual benchmark, evolving alongside the industry it represents. Each year, it will chart progress, expose pain points, and highlight opportunities for improvement, turning the conversation about BTL effectiveness from fragmented anecdotes into collective evidence.

And as the data deepens, so too will the solutions. Ideally's independent platform ensures that insights are grounded in objectivity, while Curious Nation's applied curiosity helps turn those insights into action.

Together, we're helping marketers move from measurement chaos to confident clarity, one activation at a time.

Appendix: Methodology

Sample

87

marketing specialists
across Australia and
New Zealand

Seniority

80%

at senior, director,
or head level

Method

Quantitative and qualitative
online survey conducted via
the Ideally platform

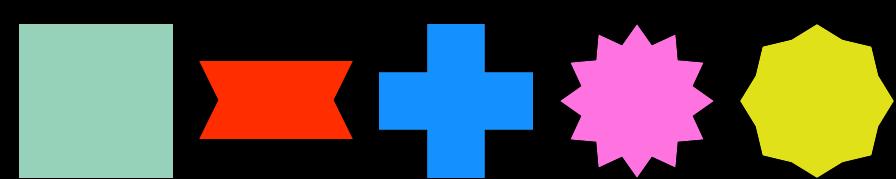
Timing: September 2025

Curious Nation is a go-to activation partner for brands who want to stand out.

We're a friendly bunch of curious experts who create attention grabbing experiences that drive business growth across digital, retail & in the real world.

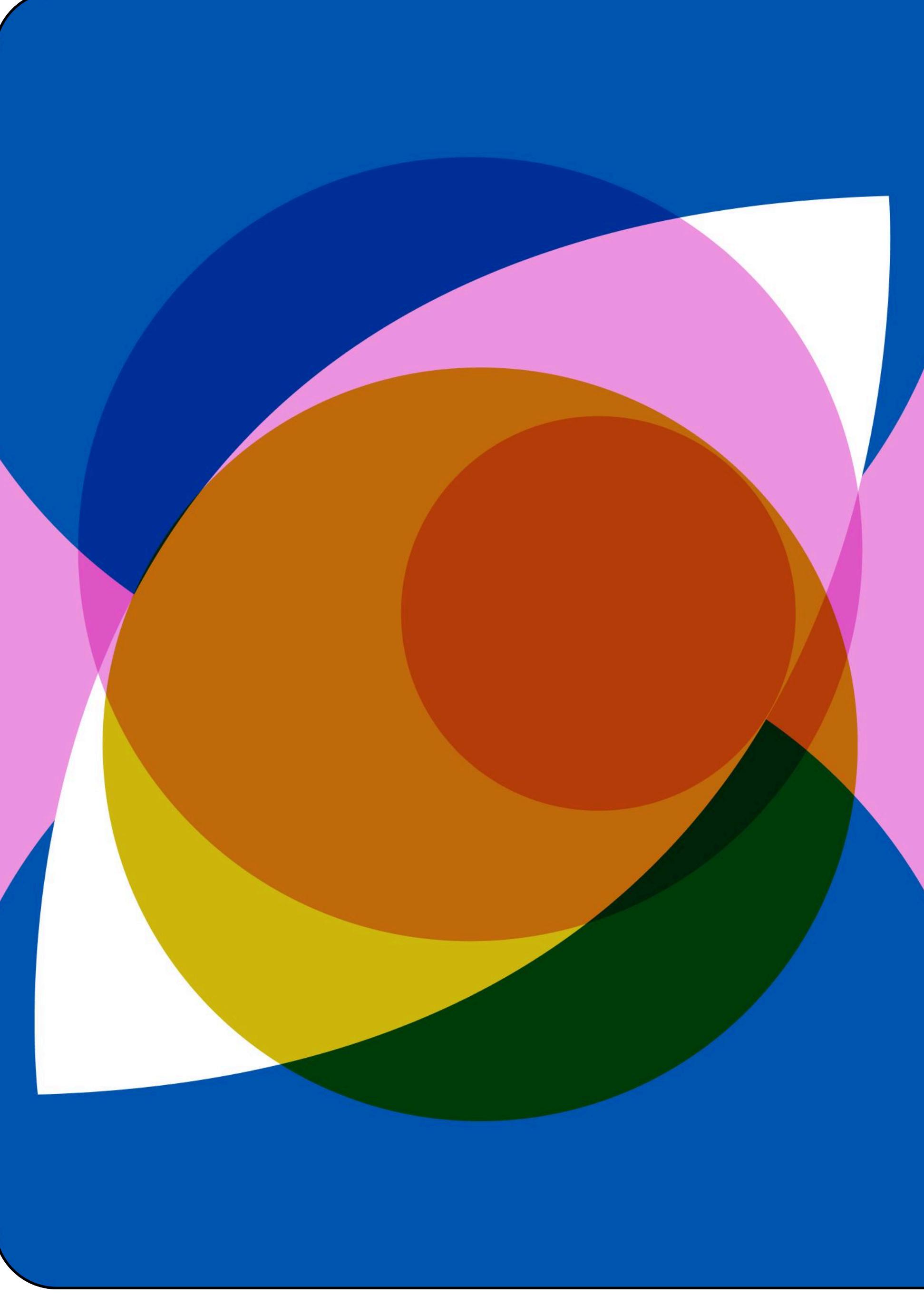
We thrive on discovery, and curiosity is our strategy. Everybody feels it. And it's your best way of forging deeper connections with your audience. We're all about curiosity. We're all about growth.

Curious Nation. Beyond the obvious.



curiousnation

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Ideally is a connected insights platform helping marketers and agencies understand what people think, feel, and do. By uniting data from real people with industry benchmarks, Ideally enables brands to make smarter, faster, and more confident decisions.

ideally