

Digital Market Update

August 25

Based on annual data across Shopify, Google, Meta and SEO



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E-com Landscape

1.0

August E-com Wrap Up.

Solid gains signal confidence in a notoriously tricky trading month.

Year-on-Year: Sales climbed an impressive 7.21%, with a 5.88% lift in AOV offsetting modest order growth. Discounts were up (23.3%), but returns were flat, which tells us buyer expectations are being met. Keep building trust with comprehensive PDPs (product detail pages) that highlight fit, fabrication and craft.

Month-on-Month: Revenue dipped 1.72% and orders were down 10%, but margins were protected by a 9.57% jump in AOV, an 11.03% drop in discounts and audience growth of 9.63%. Heading into BFCM, now's the moment to ramp up retargeting, and maximise lead capture with pre-sale waitlists and exclusive perks.

Key Takeaways: Bigger baskets, healthier promo discipline and growing reach put us in a strong position to see out the year on a high. September is about converting current momentum into a decisive Q4 plan: locking in offer architecture, accelerating list growth, and pressure-testing creative and PDPs for peak trading season.



Spotlight on Sales

Each month, we aggregate anonymised performance data to provide a benchmark of what's happening right now across our portfolio.

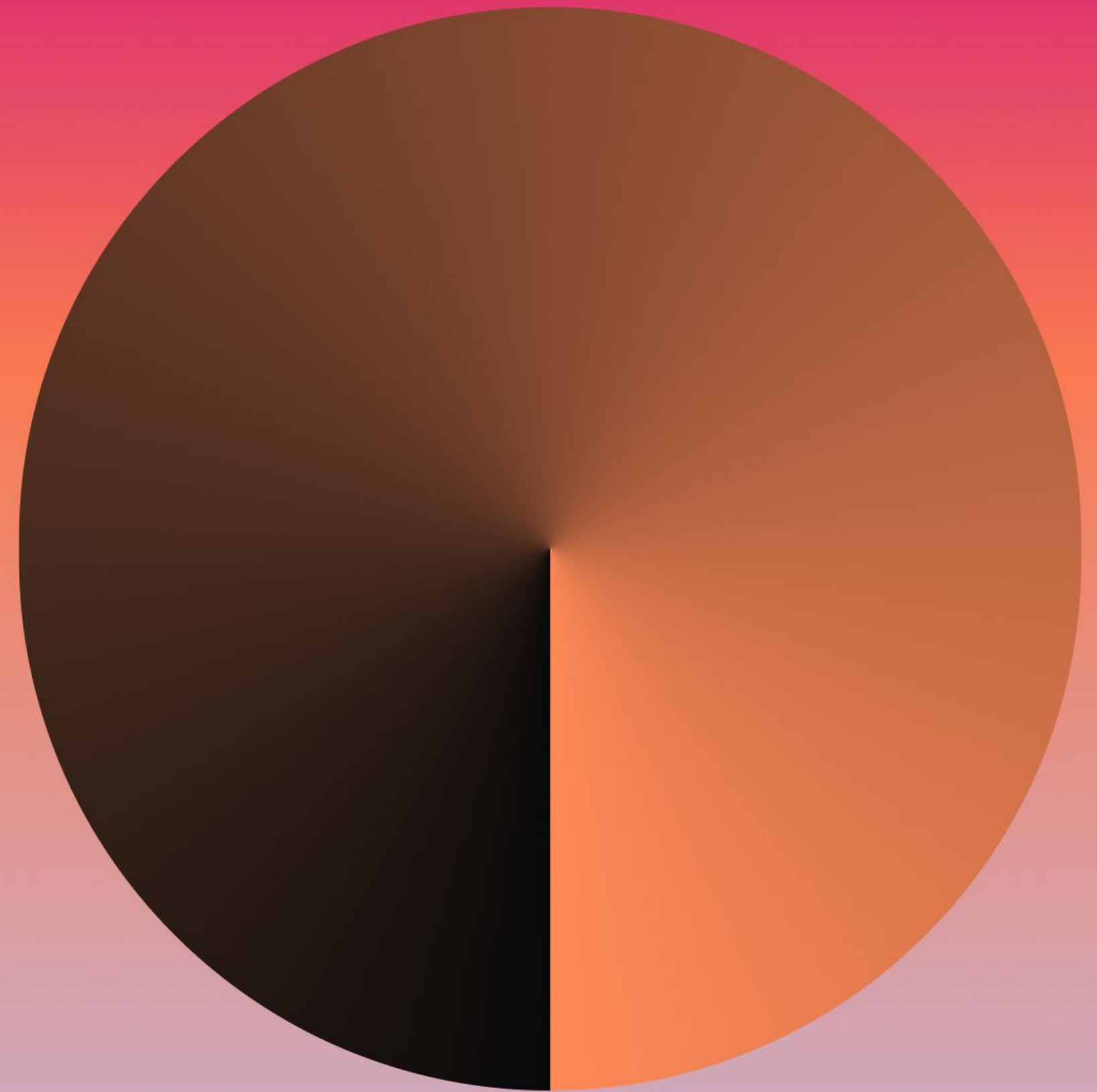
Month-on-Month Trends (August 2025 vs. July 2025)

Metric	Change	Strategic Insight
Revenue	-1.72%	Holding firm after July's surge – an ideal springboard to accelerate into BFCM with a cleaner base and stronger mix.
Orders	-10.01%	Leaner checkouts emphasise the importance of pre-sale nurturing, waitlists, and early-access mechanics.
Customer Count	+9.63%	Audiences are up sharply. Prime these fresh segments with warm-up journeys and VIP lists.
Discounts	-11.03%	Less discounting, same momentum proves value messaging is landing. Consider this as you build out BFCM offer stacks.
Average Order Value	+9.57%	Bigger baskets make a big difference to the bottom line. Keep AOV climbing with curated bundle offers, 'complete-the-look' prompts, and smart free-shipping thresholds.
Returns	+5.54%	Slight uptick no cause for alarm, but a timely reminder to tighten fit/size guidance, and strengthen comms around styling tips and post-purchase care ahead of peak season.

Year-on-Year Trends (August 2025 vs. August 2024)*Average sales performance across PH Digital clients.*

Metric	Change	Strategic Insight
Revenue	+7.21%	Robust growth and an excellent platform to hit peak season with confidence!
Orders	+1.42%	Demand holding steady. Lift yield per visit with premium add-ons and sharp merchandising.
Customer Count	+4.69%	A wider base to work with is a significant win. Scale reactivation, referrals and VIP tiers to grow LTV.
Discounts	+23.30%	Winter promotions clearly resonated. Evolve into value-stacked, margin-safe offers for BFCM.
Returns	+0.35%	The ultimate customer satisfaction indicator! Prioritise reviews, PDP clarity and care flows to avoid backsliding.
Average Order Value	+5.88%	Customers are happily trading up. Continue to entice them with curated bundles and threshold incentives.

Key Takeaways: August served quality over quantity, with healthier margin signals, stable product confidence, and fresh audiences to prime. Harnessing these wins for BFCM and beyond will require smart offer sequencing, rock-solid PDPs, and airtight retention flows. **PH Digital clients will receive their BFCM Action Plan in the coming days.** Our Lead Strategists will answer FAQs and unpack key points in an interactive, online seminar later in the month.



Strategic Recommendations

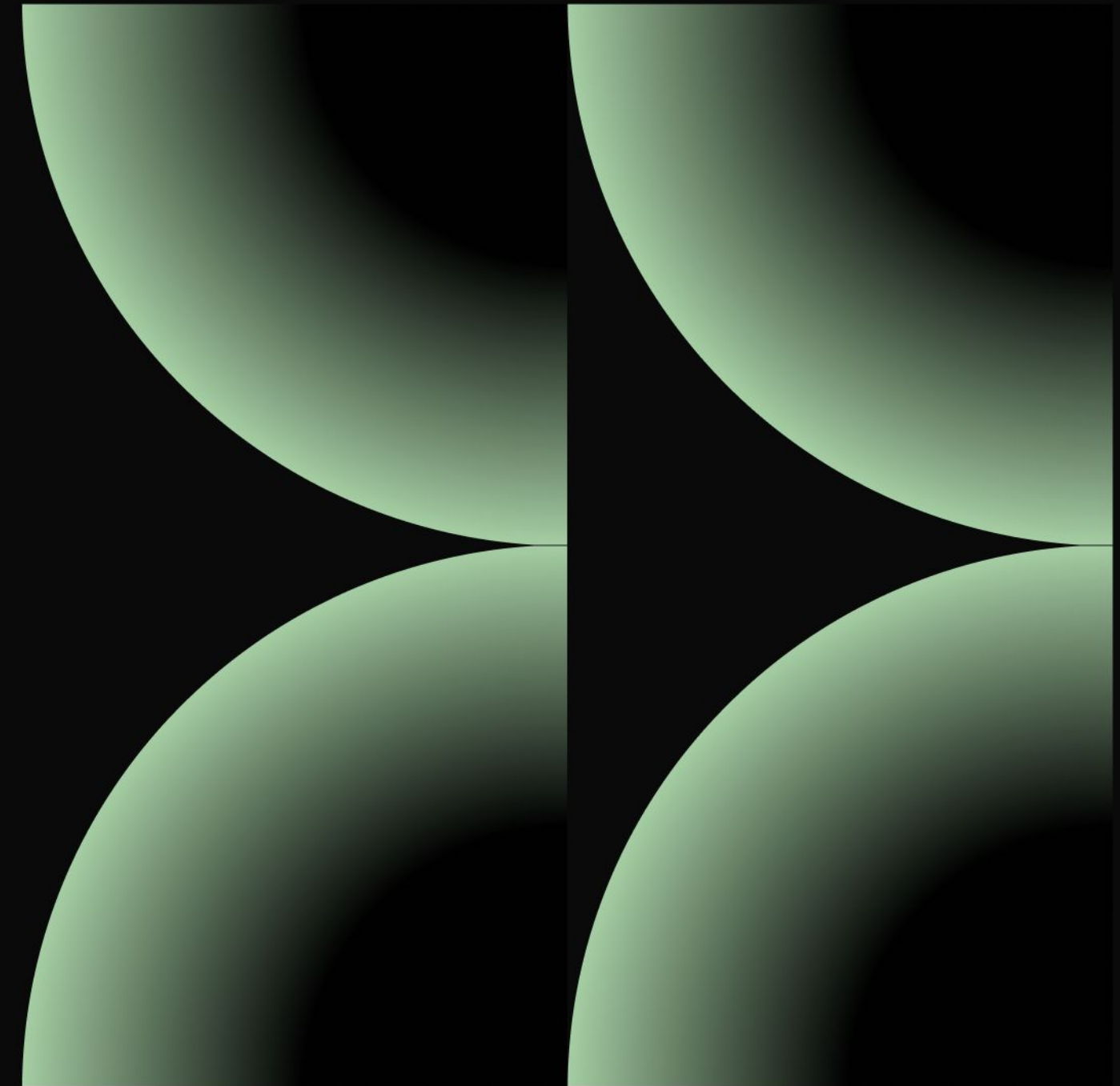
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Your Digital To-Do List.

Sept/Oct are for decisions and sign-offs so we can build, test and scale BFCM campaigns without friction. Here's how you can help us execute your strategy:

- **Lock in your BFCM framework:** Block out 17 Nov–1 Dec for sale (option to launch 14 Nov, talk to us). Confirm 48-hr early access and a 48-hr extension.
- **Confirm product, ops & budgets:** Nominate hero SKUs/bundles and stock positions, shipping cut-off policy, November-led budgets (Nov > Dec > Oct), ROAS/revenue targets, and approval pathways.
- **Set the offer and guardrails:** We strongly suggest $\geq 20\%$ sitewide (with exclusions), and a backup rate so we can pivot fast if competition is fierce.
- **Ready the site to convert:** Approve sitewide banner approach (“discount applied at checkout” if no strike-throughs), update abandon cart copy, and work through PDP priorities (fit/fabrication, reviews, ‘complete-the-look’).

Our **BFCM Action Plan** will be your new bible – empowering you to be organised and decisive now, so November’s execution is fast, confident and profitable.



How PH Digital is Helping.

This month, our focus is BFCM readiness – turning August’s signals (bigger baskets, lower discounting, growing audiences) into a plan you can run with.

- **Offer & calendar sprint:** We’ll help structure and schedule your BFCM activity, building out a bespoke, campaign run-sheet designed to protect profit margin and brand perception.
- **Nurture TOF:** We’ll increase TOF budgets in Sept/Oct to build pools, run segmented prospecting, capture leads/VIP waitlists, and keep frequency healthy so audiences are warm before BFCM.
- **Paid media playbook:** On Meta, we’ll test Conversions vs Advantage+ and shift budget to the winner. On Google, we’ll pin BF headlines/descriptions in Brand Search, create PMAX BFCM asset groups (no new campaigns), and prep remarketing lists and shipping-cut-off comms.

Whether you need quick wins or durable gains, we’ll help you test in September, scale in November, and finish the year strong.



Paid Performance Insights

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August Google Ads Performance.

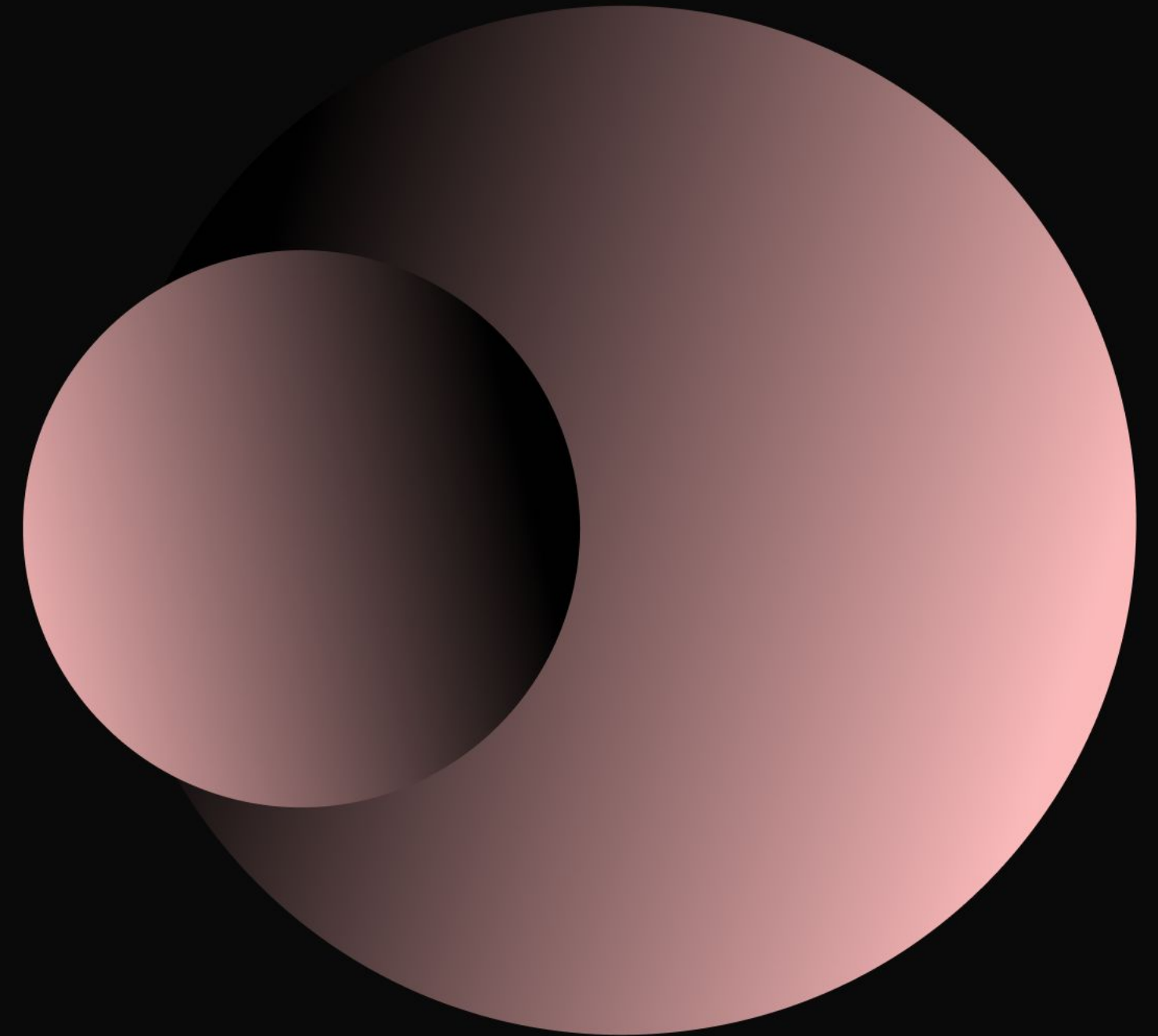
A calm and efficient base to scale into BFCM:

In August, revenue eased 13% following a 2.7% reduction in spend, and CTR and CPC held steady – a seasonal pause, not a performance issue. Year-on-year, +21.6% spend delivered +25% revenue, with PMax, Generic and Brand all in growth.

Month-on-Month: With auction costs steady, the gap is conversion. Tighten audience signals, refresh creative and sitelinks, and speed up landing pages. Use September to seed BFCM assets (early access, bundles, threshold shipping) across PMax and high-intent Search.

Year-on-Year: CTR +11% shows stronger relevance; CPC +11% reflects tougher auctions that PMax is offsetting. Keep Brand defended, sculpt Generic queries, and lean into value-based bidding to scale without sacrificing ROAS.

Key Takeaway: The mix is working: PMax as the efficiency anchor, Search for incremental demand. Test BFCM formats now so we enter peak season with proven winners and confident budgets.



August Paid Social Performance.

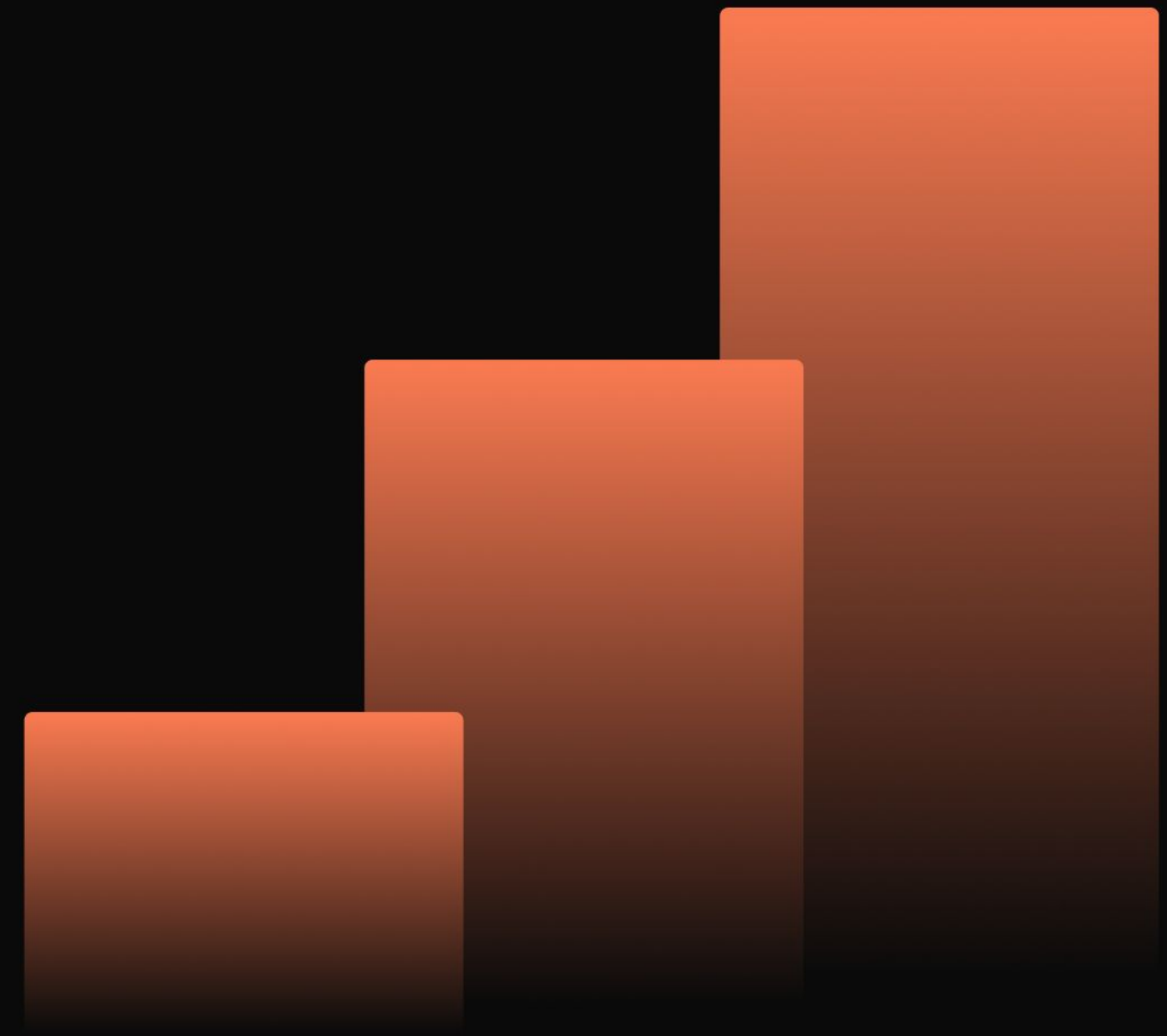
Tighter auctions but relevance still strong:

Despite platform challenges, CTR rose +1.39% in August, which tells us creative is landing. The efficiency squeeze aligns with sky-high CPM and CPCs and softer local demand, both of which dampen conversion even when engagement holds.

Month-on-Month: With revenue down 13% on near-flat spend, August's ROAS reflected rising ad costs, and underscored an urgent opportunity to identify what's working (higher CTR) and convert it better: tighten lower-funnel retargeting, sharpen offer clarity in ad creative, and send traffic to faster, sale-ready pages.

Looking Ahead: Expect to see ad costs continue to rise in late-Q3, with a further step-up into Q4. This is normal and historically worth the spend, given the outsized share of peak-season revenue. Testing ad sets now will allow us to enter November with proven winners, so higher CPM/CPCs still pay back.

Key Takeaway: The market got pricier, not weaker. Engagement is up, so stay in market, codify what's winning, and you'll be set when BFCM demand spikes.



The Viral Content Trap.

With paid ad costs steadily rising, marketers are being tasked with making every dollar count. For many brand founders, the solution seems simple – virality! Film some office shenanigans, add trending hashtags, post at bedtime and boom, sales.

Note to founders: controversial hooks and pop culture tie-ins don't decide what goes viral. Your audience does. Invest in building an online community that cares about your brand, and the likes and conversions will come. Here's how PH can help:

- **Audience before algorithm:** We build owned lists and precise remarketing strategies (lead gen, VIP, SMS) so content reaches people primed to buy.
- **Storytelling, not stunts:** A consistent voice and content pillars do more for brand recognition and perceived product value than ad-hoc novelty posts.
- **Funnel beats luck:** Give hooks a path: relevant landing pages, PDP proof (UGC/reviews), timely offers, and post-purchase flows to turn spikes into LTV.

Key Takeaway: You can't control virality, you can only control the crowd and the path to purchase. We'll help you find, warm, and convert the right audience so when an authentic moment resonates online, it compounds into revenue, not just reach.



Platform Updates

4.0

Paid Platform Updates.

This month's most newsworthy insights and need-to-know updates across **Google, Meta and TikTok**, and how you can take action.

1. Platform: Google Ads

What's New: Demand Gen reporting now breaks out YouTube ad placements, so you'll get a clearer read on where your creative is working best (In-Stream, In-Feed, or Shorts), and we can shift budget to the best-performing spots.

→ **Take Action:** Talk to your strategist about splitting testing and budgets by placement: Shorts for hooks; In-Stream for longer demos. Promote winners for BFCM.

2. Platform: Instagram

What's New: Instagram has rolled out Reels linking, enabling creators to connect multi-part clips into a mini-series format with in-stream prompts (e.g., "Watch Part 2"). A win for audience retention, the update reinforces episodic viewing with better continuity for tutorials, launches and multi-SKU stories.

→ **Take Action:** Plan 2–3 part Reels with clear hooks and cliff-hangers. Publish in sequence and measure completion/"next part" taps to decide which series to scale.

3. Platform: TikTok

What's New: TikTok's new Symphony Creative Studios & Assistant joins the suite of increasingly sophisticated AI image generation tools available to advertisers globally, speeding production of on-brand video variants.

→ **Take Action:** Start experimenting with Symphony now. Turning your creative assets into quick, on-brand video variations for testing throughout Sept/Oct will give us a BFCM shortlist to work with.

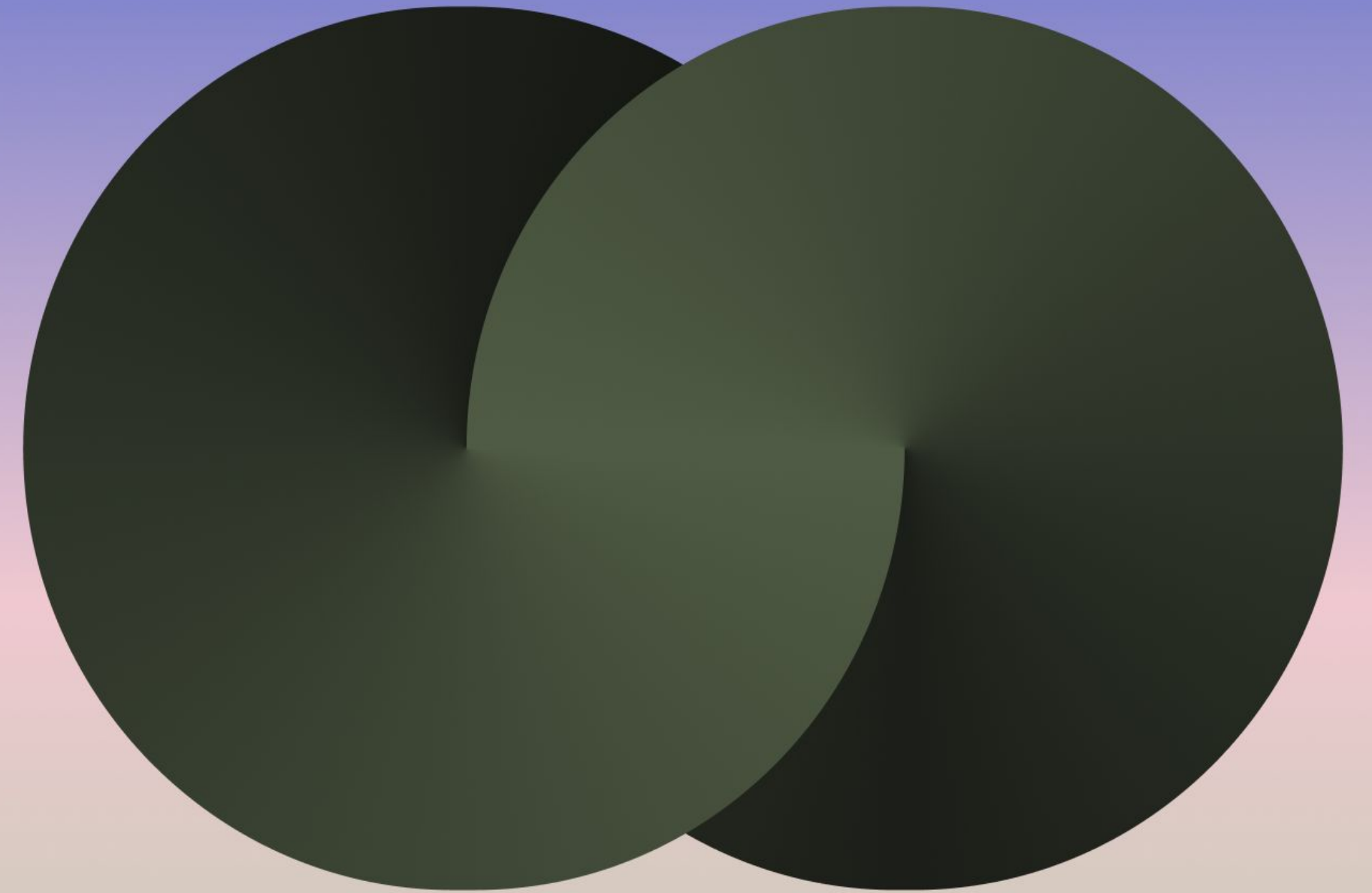
Email Marketing Updates.

Mailchimp changes improve visibility; aid diagnostics.

What's Changed: Mailchimp has added live status tracking for its transactional emails (so you can see if the send pipeline is healthy in real time) and a native attribution model that ties orders to specific emails more reliably.

Why it Matters: If a key email (order confirmation, password reset, abandon cart) is delayed, sales can quietly slip. Live status means faster diagnosis and fewer surprises. The new attribution also gives a truer picture of which emails actually drive purchases, not just opens, so budgets and creative can adapt to what works.

- **We'll handle the setup.** We'll add status monitoring, set fallbacks for any outage, and update reports so "conversion" is counted consistently.
- **Not on Mailchimp?** No problem. We can apply the same logic to your CRM platform and flag any gaps where a simple workaround is needed.
- **What next?** Optimise with the new data. Use clearer contribution signals to refine subject lines, CTAs, sequencing and send timing – prioritising emails that move revenue, not just opens and clicks.



SEO Landscape

5.0

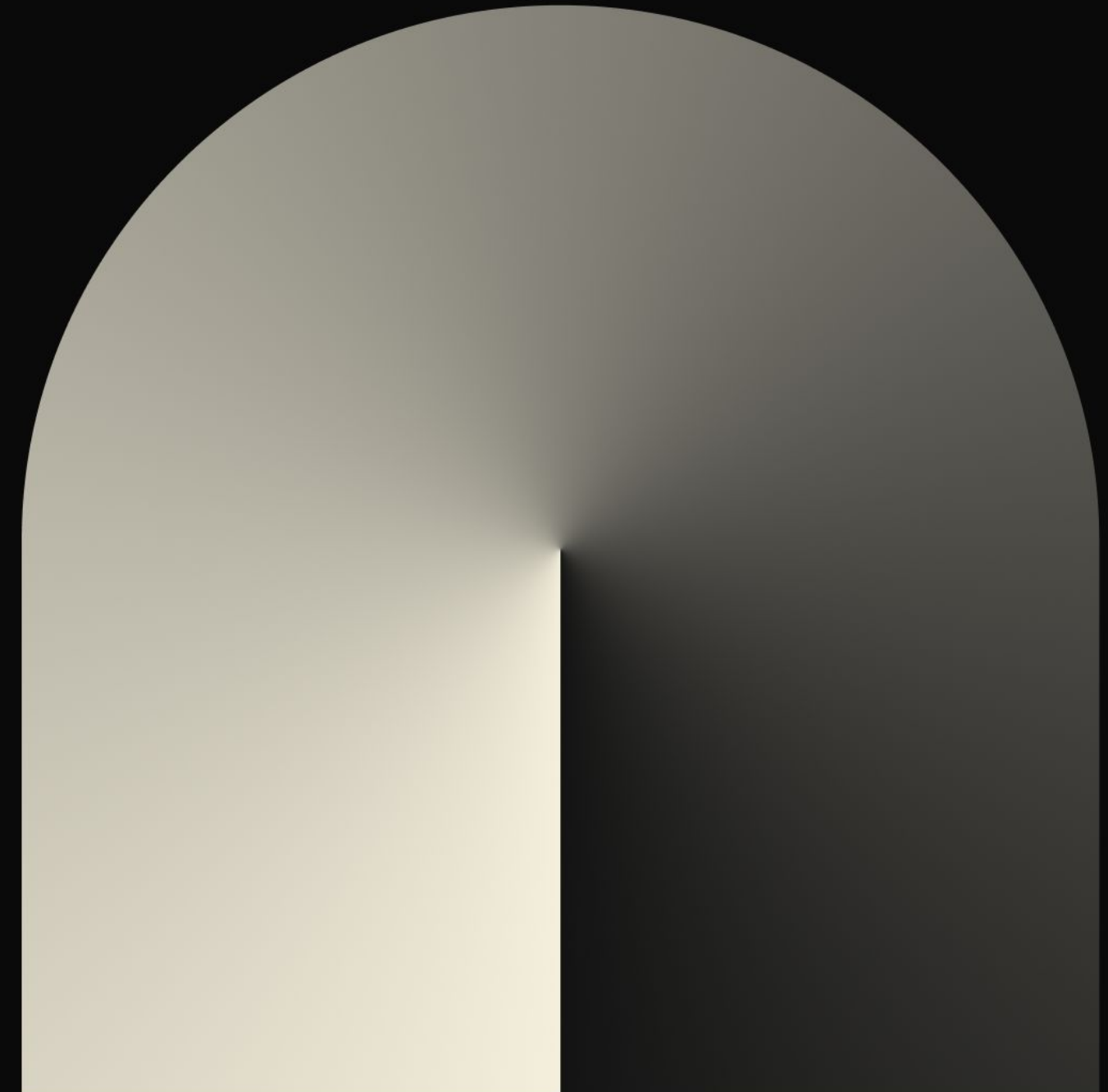
Important SEO Updates.

What's New: Google's August Spam Update is still rolling out worldwide. It targets low-quality tactics (think auto-generated pages, junky redirects, scraped listings) and is causing noticeable ranking swings across categories, which industry trackers have confirmed could take "a few more weeks to land".

Why it Matters: Stores with thin product pages or templated blog filler may wobble; brands with useful pages, real reviews, and tidy site architecture can expect to stabilise once the dust settles.

What's New: AI Mode / AI Overviews continues to expand and evolve, with Google-watchers reporting availability in 180 countries, plus active tests to drive more clicks to websites, and additional features like product comparison checkboxes in AI Overviews. There's even chatter about AI Mode becoming the default view.

Why it Matters: With shoppers increasingly meeting answers before links, Google exploring ways to send traffic back to websites is good news. Wise retailers will ensure they're surfaced either way by investing in structured data (how AI tools 'read' content), and updating PDPs with clear specs, pricing, pros/cons and reviews.



Your SEO To-Do List.

The next month is about making small but impactful SEO tweaks that will move the needle for Black Friday.

It's also about locking in larger projects that we can execute in plenty of time for Christmas and Boxing Day trade, setting you up for a stress-free summer.

1. Quick Fixes for Quick Wins (in market by BFCM)

- **Approve title/meta refreshes** for your top money pages (collections, PDPs, gift cards). We'll supply options; you green-light them.
 - **Sign off PDP clarity:** confirm specs (fabric, care, fit), key benefits and FAQs so we can hard-wire proof that converts and ranks.
 - **OK review/UGC boosts on priority SKUs** (Q&A prompts, pull-through on PDP). Social proof wins both SEO and checkout.
 - **Confirm sitewide messaging** (shipping, returns, cut-offs) so we can surface it in headers/FAQs and eligible rich results.
 - **Green-light speed trims** (script defers, media compression). Faster pages lift organic visibility and conversion.
-

2. Getting Ahead for Festive Trade (act now for Dec payoff)

- **Back a content sprint:** gift guides, "best-of" round-ups, size/fit hubs and comparison pages – built to win links and AI/Answer placements.
- **Approve trust signals:** author bios, About/Store info, warranty/repairs – strong E-E-A-T that helps rankings and reassurance.
- **Schema expansion:** sign off Product/FAQ/Review/Video markup on key pages to earn richer results.
- **Deals architecture:** confirm an evergreen/Black Friday hub and "early access" landing we can reuse for Boxing Day/EOSS.
- **Tech backlog:** prioritise navigation/faceted URL rules and INP performance work so crawling, indexing and UX stay smooth in peak.

PH Insights Hub

6.0

PH Digital Lab Report.

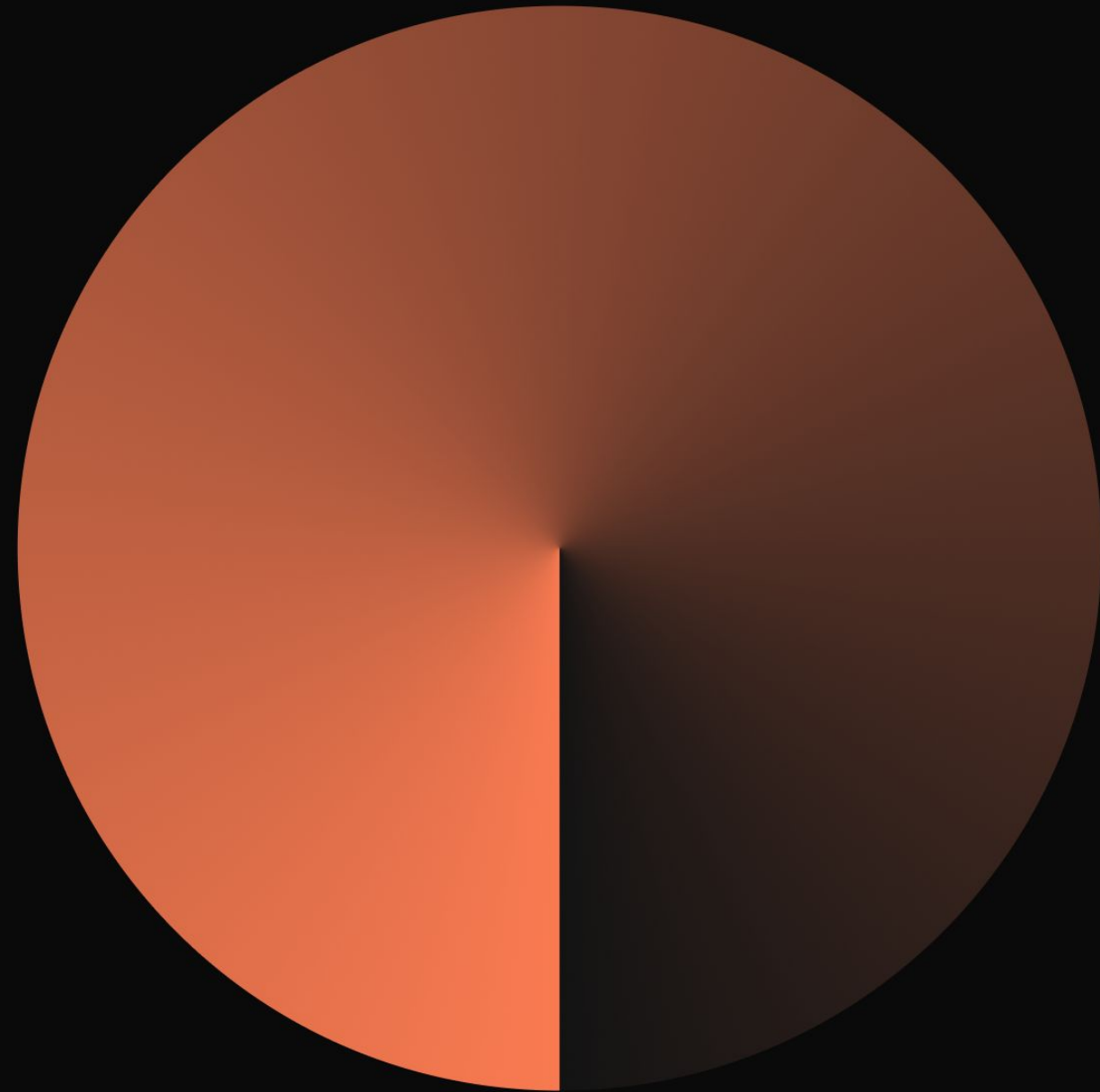
In this monthly digest of the digital updates making waves across the web, we share the TL;DR version (that's *too long, didn't read*), and our expert team's top takeaways.

Jeanius or Madness? American Eagle's "Sydney Sweeney Has Great Jeans" campaign was quickly flagged as a racist dog whistle. Yet with the brand reporting record-high Q2 sales of US \$1.28bn, and its CMO openly attributing these numbers to their "most successful campaign to date", we're once again asking: is there *really* no such thing as bad publicity?

Our Take: The controversy made people look, but a clear promise (great jeans), tight CX, and rapid restocks made them buy. Culture war content is a risky strategy, but if your mind's made up, at least build for monetising the moment – not surviving the discourse.

Banana Split: Google's Nano Banana puts studio-grade edits in a chat window: instant background swaps, character-true tweaks, on-brand variants, all marked with SynthID. It's brilliant for mock-ups and speed testing, but the same realism invites misuse, raises IP/privacy issues, and will result in generic, over-polished creative if teams lean on it too hard.

Our Take: Treat it as acceleration, not replacement. Keep creative leads in the loop and set boundaries: quick content and experiments, not hero assets. Tight funnels and distinct ideas remain critical. This tool just lets you test them much faster at lower cost.



- 3. Peak Engagement:** Taylor Swift announces her engagement and breaks platform records in minutes; “ring theory” spawns millions of UGC takes; jewellery brands ride the wave with look-alikes; venues report Swiftie-coded enquiries; playlists, outfits and Eras-themed hen dos flood feeds. This is the Swift economy. It’s not gossip, it’s a GDP event.

Our Take: Public pop culture milestones are like mini stimulus packages, with the spend landing where brands have permission to join the story. For marketers that means authenticity over ambush. Build community before the moment so when culture surges, you’re an established character with something to offer the plot – not just a footnote.

- 4. No Cans, All Fans:** Rebranding International Friendship Day as ‘Best Pals Day’, Pals delivered a pink-hot activation without opening a single can. Instead, Flight Coffee served flat whites in Pals-pink cups; Liquid Lightning riffed an Erewhon-style smoothie; and a one-day merch drop (custom Pals x Acme mugs) sold out in 30 minutes.

Our Take: When your codes and community are strong, the product can leave the frame. By borrowing brand equity and adding scarcity, Pals converted fandom into lines, receipts and content – no hangovers involved.

- 5. Out of the Box:** IKEA’s NZ launch is turning into a logistics masterclass, with distribution set to double as marketing thanks to official delivery partners NZ Post and Mainfreight signing off on blue-and-yellow branded trucks and numerous regional pick-up points.

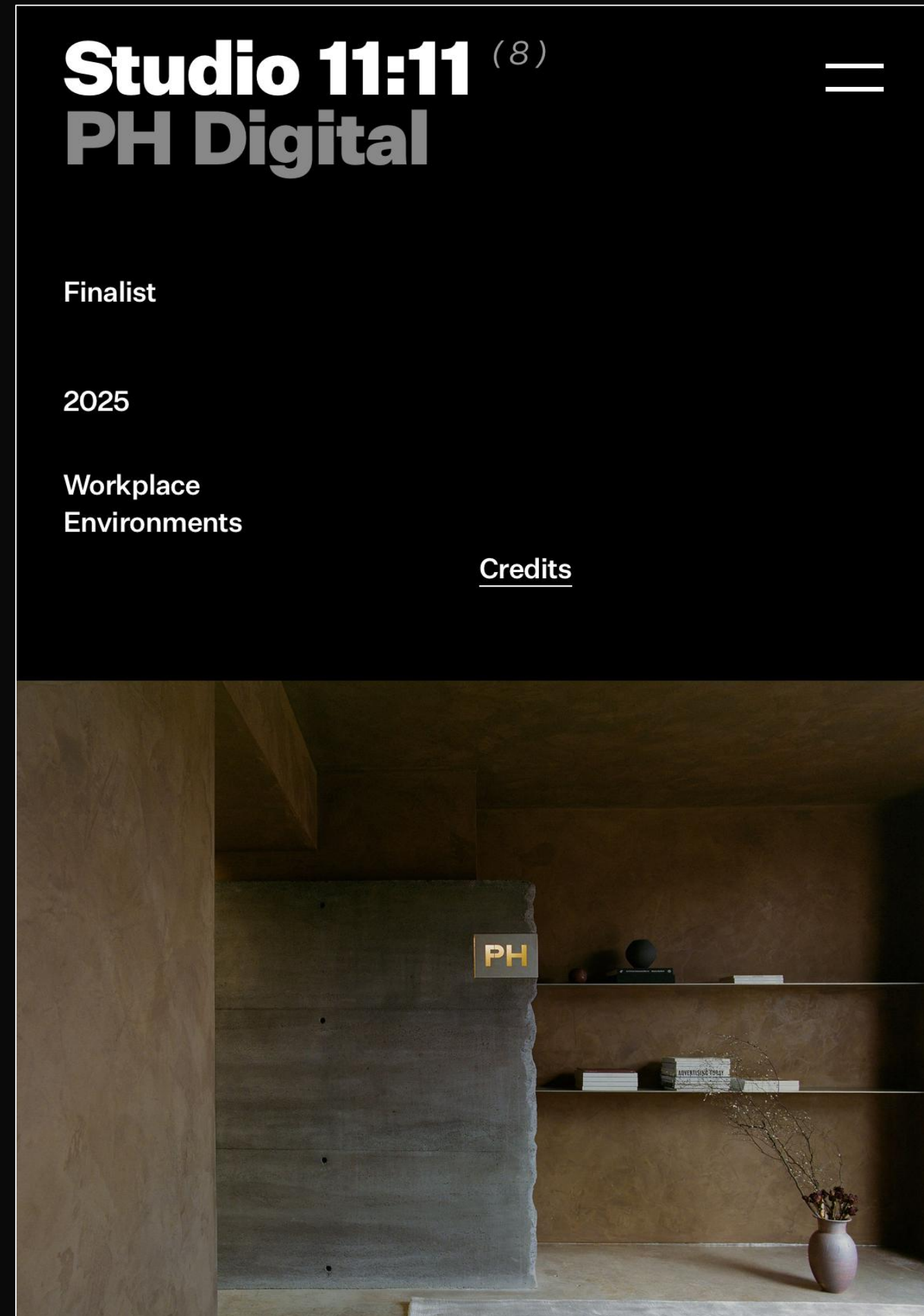
Our Take: This is a clever play that’ll help IKEA establish regional relevance faster than store rollouts, at a lower capex, and with data loops on where demand actually lives. Brands looking at store expansions should consider that when the network becomes the showroom, the game shifts from “how many stores?” to “how many touchpoints?”.

PH Press

PH Digital Named Finalists – Workplace Environments

PH Digital Studio Best Design Awards Finalist

We're thrilled to share that our Grey Lynn headquarters has been recognised as a Finalist in the Best Design Awards – Workplace Environments category. Designed in collaboration with Studio 11:11, the space reflects our ambition, creativity, and culture, bringing to life a workplace that inspires bold thinking, deep collaboration, and meaningful connection.



PH Press

PH Digital Named Finalist – 2degrees Business Awards



PH Digital Named Finalist 2degrees Business Awards

We're proud to share that PH Digital has been named a Finalist in the 2degrees Auckland Business Awards, Excellence in Strategy category. This recognition highlights our relentless focus on strategic growth and the impact we're making for ambitious brands across New Zealand and Australia.

Paid Metrics Index

7.0

Paid Metrics Index – Key Acronyms.

SEO - Search Engine Optimisation: The practice of optimising a website to improve its visibility and ranking in search engine results pages.

SEM - Search Engine Marketing: A form of digital marketing that promotes websites by increasing their visibility in search engine results pages through paid advertising.

CPC - Cost per click: CPC refers to the price you pay for each ad click.

CTR - Click-Through Rate: The percentage of people who click on a specific link or ad out of the total number of impressions it receives.

ROAS - Return on Ad Spend: This metric measures the effectiveness of a marketing campaign by calculating the revenue generated in relation to the cost of the advertising. The equation is simply revenue divided by cost, so \$1 spent for \$5 revenue = 5 x ROAS.

MER - Media Efficiency Ratio: A financial metric that compares the marketing expenses of a company to its revenue or sales.

CPA - Cost Per Acquisition: A metric that calculates the average cost incurred to acquire or achieve a specific action, such as a conversion or lead.

CTA - Call to Action: A prompt or instruction that encourages users to take a specific action, such as "Buy Now" or "Subscribe."

UX - User Experience: The overall experience a user has when interacting with a website, application, or other digital product. It encompasses design, usability, conversion potential and accessibility.

LTV - Lifetime Value: The predicted revenue a business can expect to make from a customer over the course of their relationship.

Our Services

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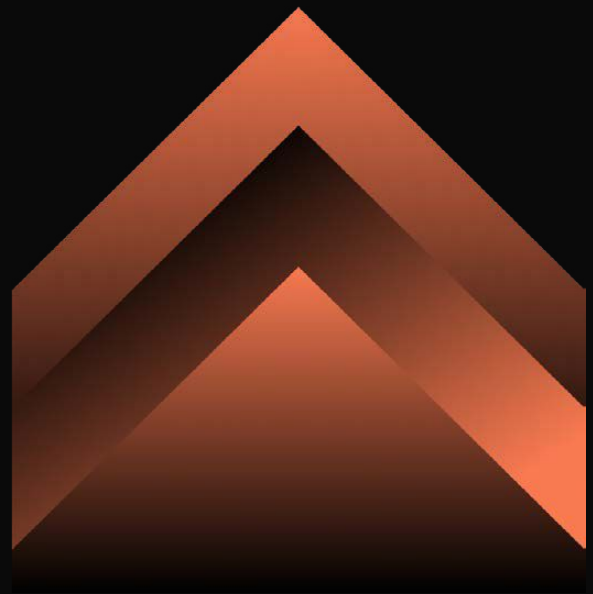
Initial Digital Audit	01
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Our Client

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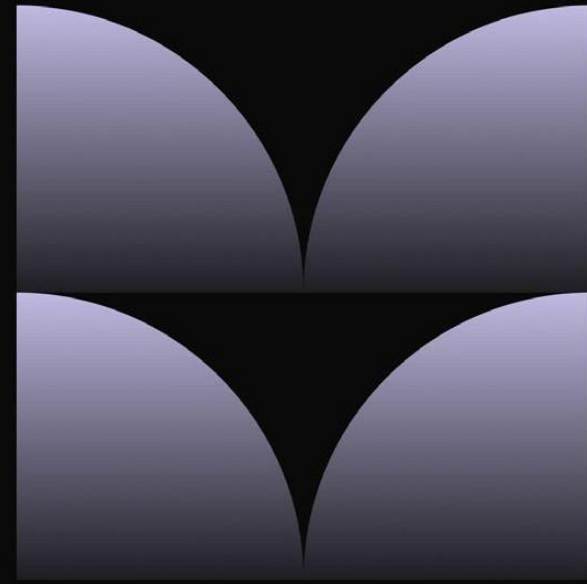
Goals & Process

(01)



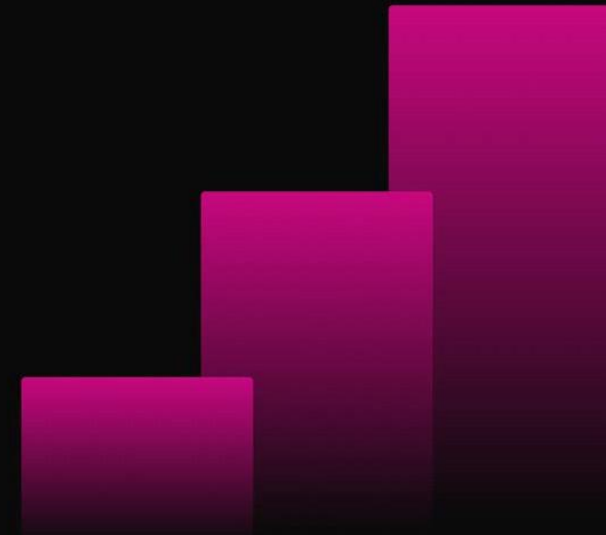
Increase customer acquisition in a scalable way.

(02)



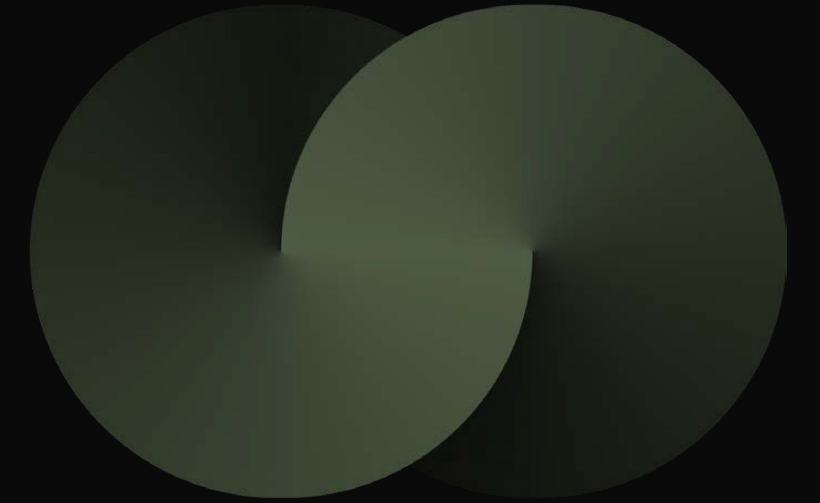
Optimise platform to maximise conversion.

(03)



Increase lifetime customer value to max retention.

(04)



Increase brand awareness nationwide.

(01)

Initial Digital Audit

Review of your current digital assets including ad copy, creative, landing pages, and entire customer experience. We'll review real-time data of customer behaviour, and identify the leaks and barriers to conversion.

(02)

Expert Analysis

Research your market, competitors and ability to scale to find you the best return for your budget We'll provide the best pathway forward for both short-term and longer-term results.

(03)

Strategy Formulation

Where our service is differentiated. Your campaign gets multi-level input from both director level and from our technology strategists. We then tailor your strategy to get you there responsibly.

(04)

Seamless Execution

We make sure your ads and website are optimised for user experience and conversion. We work on your campaigns, aiming to grow your customer base, increase your brand equity and achieve long-term, sustainable revenue growth.

We provide a Digital Strategy Roadmap when clients come on board. This is a tailored 6 step framework to drive e-commerce sales growth.

■ PHASE 1

Customer avatar definition and competitor analysis (current data analysis)

■ PHASE 2

Optimise for conversions (UX audit)

■ PHASE 3

Find and convert more highly-qualified paid traffic (email automation strategy, paid social content strategy, search strategy, influencer strategy)

■ PHASE 4

Retention strategy (Increase AOV, understand Customer Lifetime Value (CLTV) and order frequency, database segmentation, customer loyalty program)

■ PHASE 5

Grow organic traffic (SEO audit and strategy)

■ PHASE 6

Optimise and scale (spend scaling plan and conversion rate optimisation plan)

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Get started with our
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Digital Chemistry

hello@ph.digital
0800 797 473

Unit B, 24 Mackelvie St,
Auckland 1021, New Zealand

ph.digital