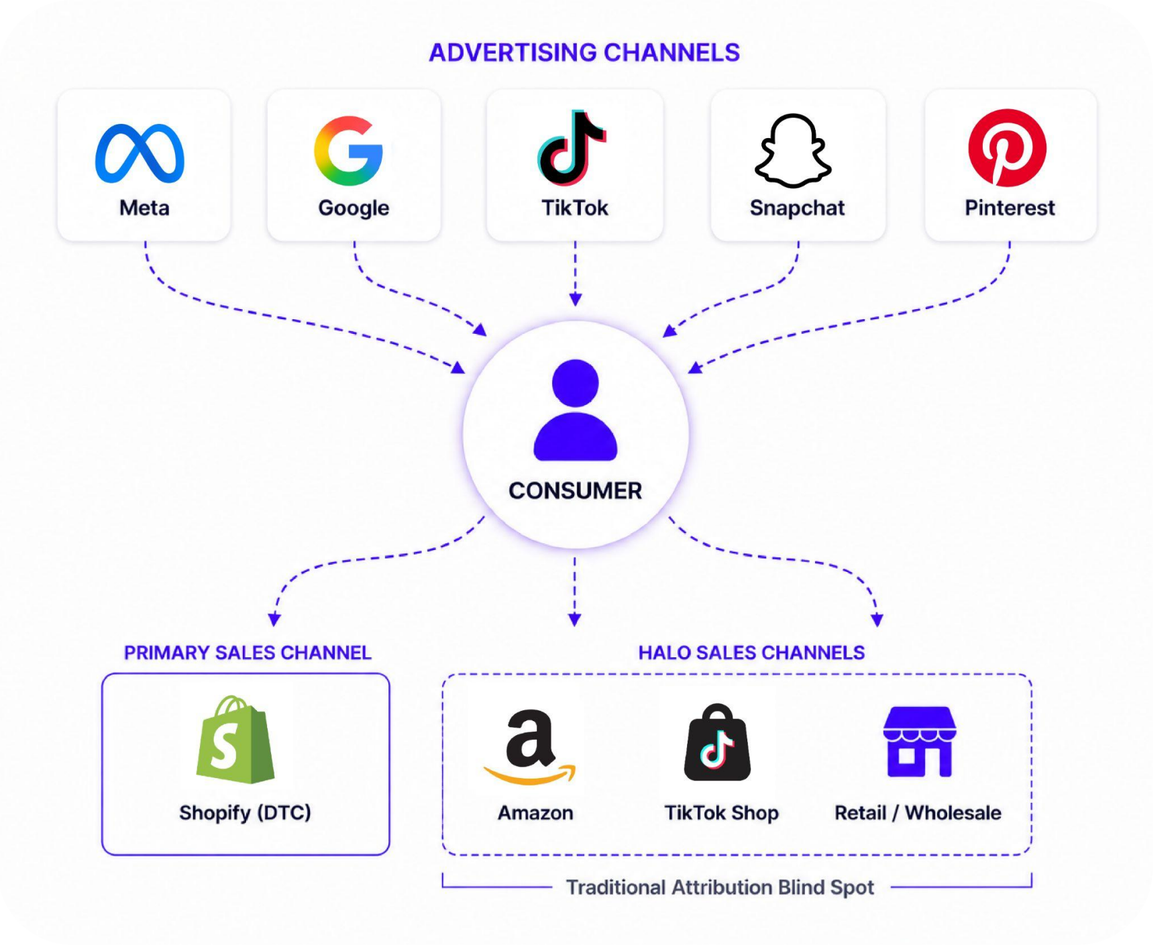
WorkMagic

The Halo Report

35.6% of Advertising Impact Exists in a Blind Spot

Research across 200+ omnichannel incrementality tests reveals how advertising drives sales across DTC, Amazon, TikTok Shop, and retail/wholesale channels beyond what traditional attribution can measure.



Key Findings

This report analyzes 200+ omnichannel incrementality tests conducted across omnichannel ecommerce brands over the past 16 months.

01

A median 35.6% of incremental orders occur outside the primary sales channel

Traditional attribution doesn’t capture purchases occurring on Amazon, TikTok Shop, retail, and other sales channels.

02

Halo effect is a fundamental characteristic of omnichannel advertising

It appears across every major advertising platform and grows as brands expand into more sales channels.

03

The size of the attribution blind spot varies systematically by business

Industry, channel mix, and advertising strategy all influence how much business impact traditional attribution misses.

04

Understanding advertising’s true business impact requires omnichannel measurement

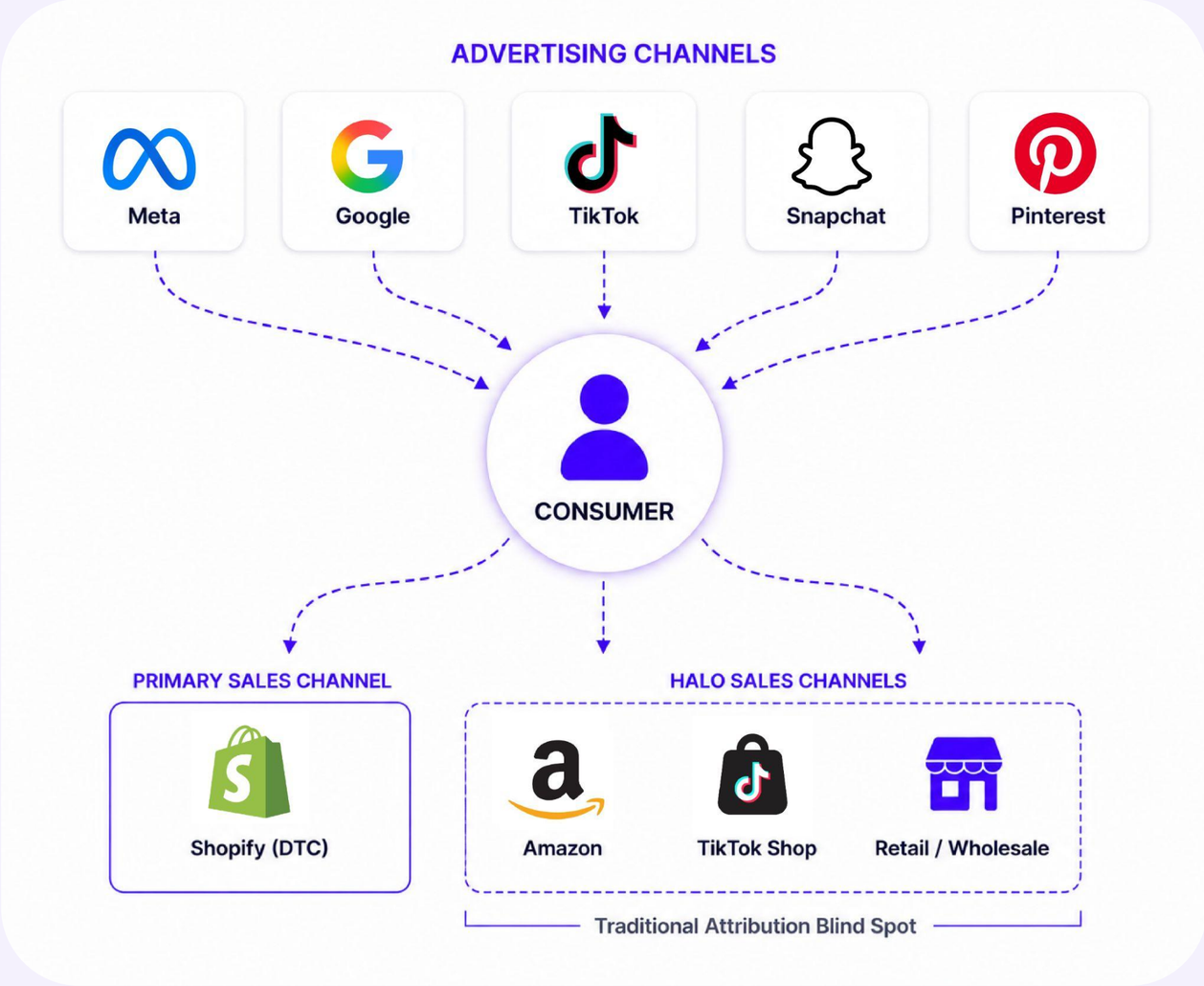
Measuring only DTC-attributed conversions can systematically understate advertising's total incremental impact.

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What is Halo Effect?

Halo effect is the causal impact of advertising on purchases that occur on a different sales channel than where attribution assigns credit.

Put simply: it’s your ads’ impact on sales on Amazon, TikTok Shop, retail, wholesale, or other non-primary sales channels.



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How Is The Halo Effect Measured?

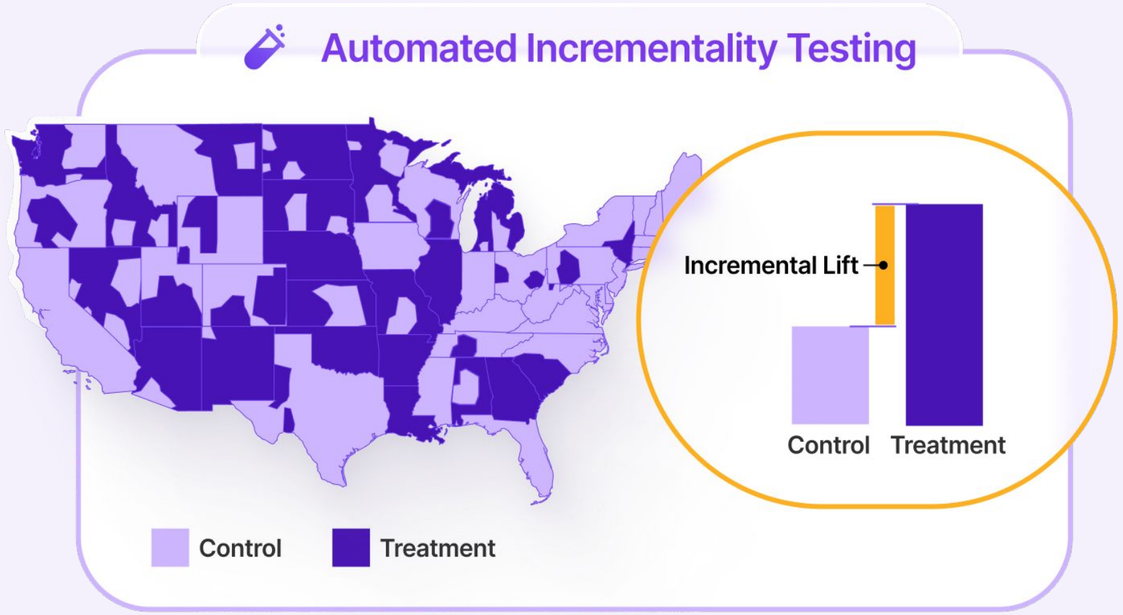
It all starts with scientifically rigorous testing

Incrementality Testing

Measures the causal impact of marketing on all sales channels by running a test between two statistically similar groups.

KEY BENEFITS

- ✓ Establishes true marketing impact
- ✓ Doesn't rely on clicks or views to measure performance
- ✓ Can measure ad-driven sales on any channel - Amazon, TikTok Shop, retail, and much more



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Report Methodology

A transparent look at our approach and data

200+

Omnichannel lift tests across 16 months

100+

brands with at least 2 sales channels, across 7 ad platforms

6

of the most popular ecommerce industries

7

ad platforms with 14 ad types

STEVE MADDEN · Branch · TRUE CLASSIC · DUDE WIPES · Comfrt · QUAD LOCK · MUD\WTR™

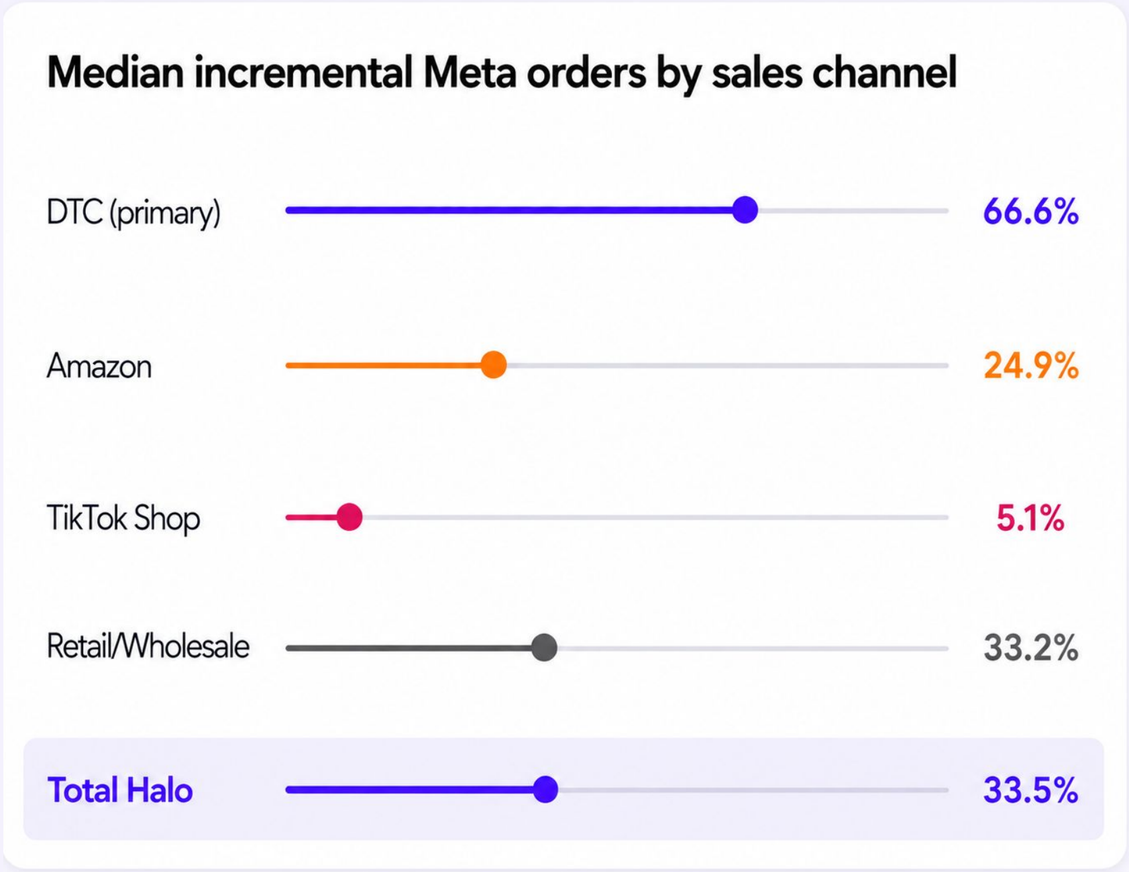
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EQUIP · HUNGRYROOT · ONNIT · dossier · DRMTLGY · arrae · DIME

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How to Read This Report

Example benchmark data you'll find throughout this report



How to Interpret These Benchmarks

Example: Where 1,000 Meta-Driven Incremental Orders Occurred

- 666 orders occurred on the brand's DTC store
- 335 orders occurred outside the primary sales channel

Among brands selling on Amazon:

- 249 orders occurred on Amazon

Among brands selling on TikTok Shop:

- 51 orders occurred on TikTok Shop

Among brands selling across retail/wholesale:

- 332 orders occurred on retail/wholesale

Total Halo: The share of incremental orders occurring outside the primary sales channel, across all other sales channels combined.

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Understanding the Benchmarks

Why the numbers don’t always add up to 100%

1 Primary Channel + Total Halo

Within an individual lift test:

Primary Channel + Total Halo = 100%

However, report benchmarks are primarily calculated using medians across many tests, so the benchmark values may not always sum to exactly 100%.

2 Individual Halo Sales Channels

Amazon + TikTok Shop + Retail/Wholesale ≠ Total Halo

Not every brand sells through Amazon, TikTok Shop, and retail/wholesale.

As a result, each sales channel benchmark is calculated from a different subset of brands and should be interpreted independently.

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How to Interpret These Benchmarks

The findings in this report represent **directional patterns observed across 200+ omnichannel incrementality tests**, not universal laws.

Your halo effect depends on your unique business profile, including your customers, sales channels, advertising strategy, and distribution footprint. As a result, it may differ meaningfully from the median benchmarks presented in this report.

These benchmarks provide context, surface blind spots, and help identify the highest-value questions to investigate in your own business.

Use these benchmarks to generate hypotheses. Measure your own business to find the truth.

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Halo Insights

Patterns and benchmarks from 200+ omnichannel incrementality tests across omnichannel ecommerce brands.

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The Hidden Cost of DTC-Only Attribution

Traditional attribution captures only a fraction of advertising's true impact

TRADITIONAL ATTRIBUTION

$0.46

MEDIAN ROAS

Last-click DTC conversions only

185% Higher



OMNICHANNEL INCREMENTALITY

$1.31

MEDIAN ROAS

Full causal omnichannel impact

Across all brands analyzed, last-click attribution reported a median ROAS of **$0.46**

When advertising's full causal impact across every sales channel was measured through incrementality testing, median ROAS increased to **$1.31**

The remainder of this report explores one of the primary drivers of this measurement gap: the halo effect

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Halo Effect Increases as Brands Add Sales Channels

OVERALL MEDIAN HALO EFFECT

35.6%

30% Median Halo

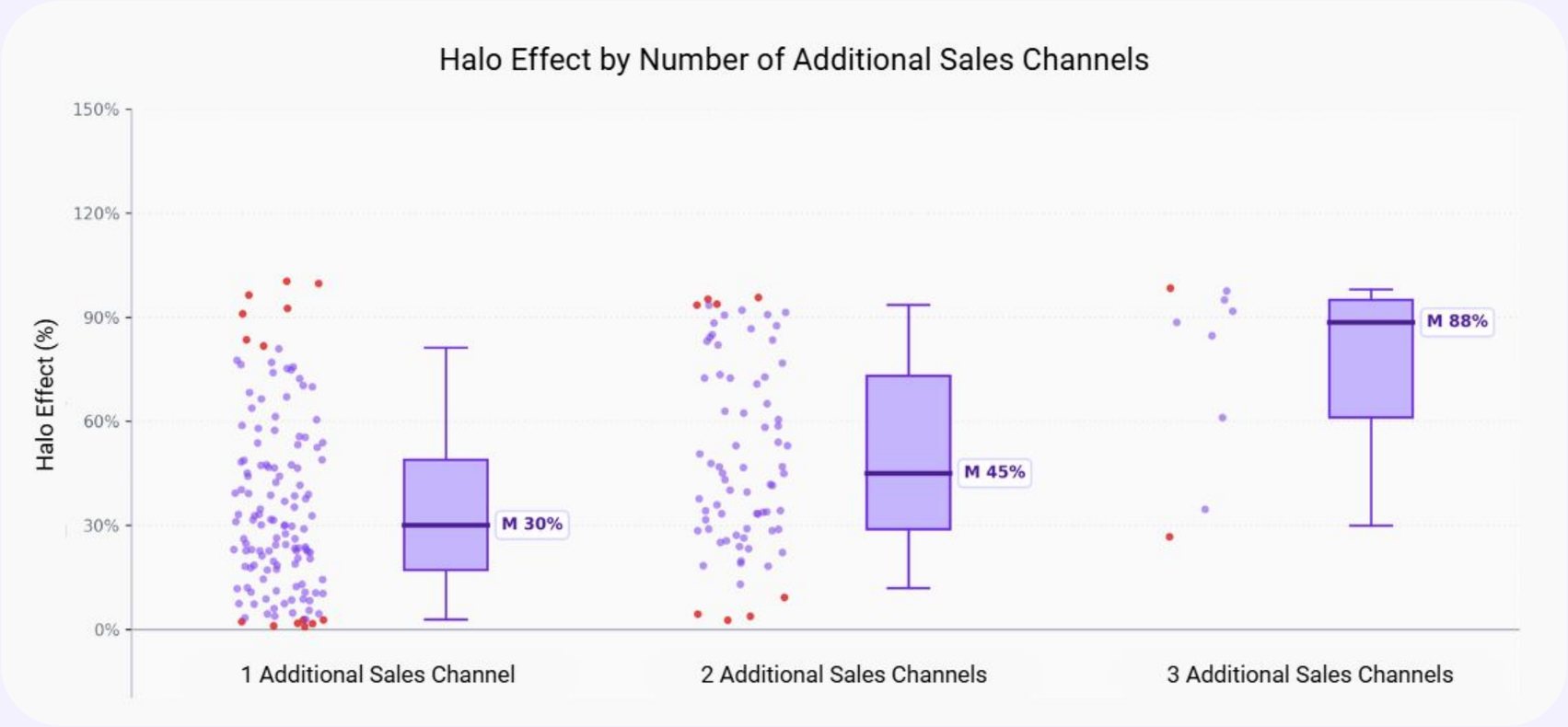
1 Additional Sales Channel

45% Median Halo

2 Additional Sales Channels

88% Median Halo

3 Additional Sales Channels



Each dot is one incrementality test. Red dots are outliers

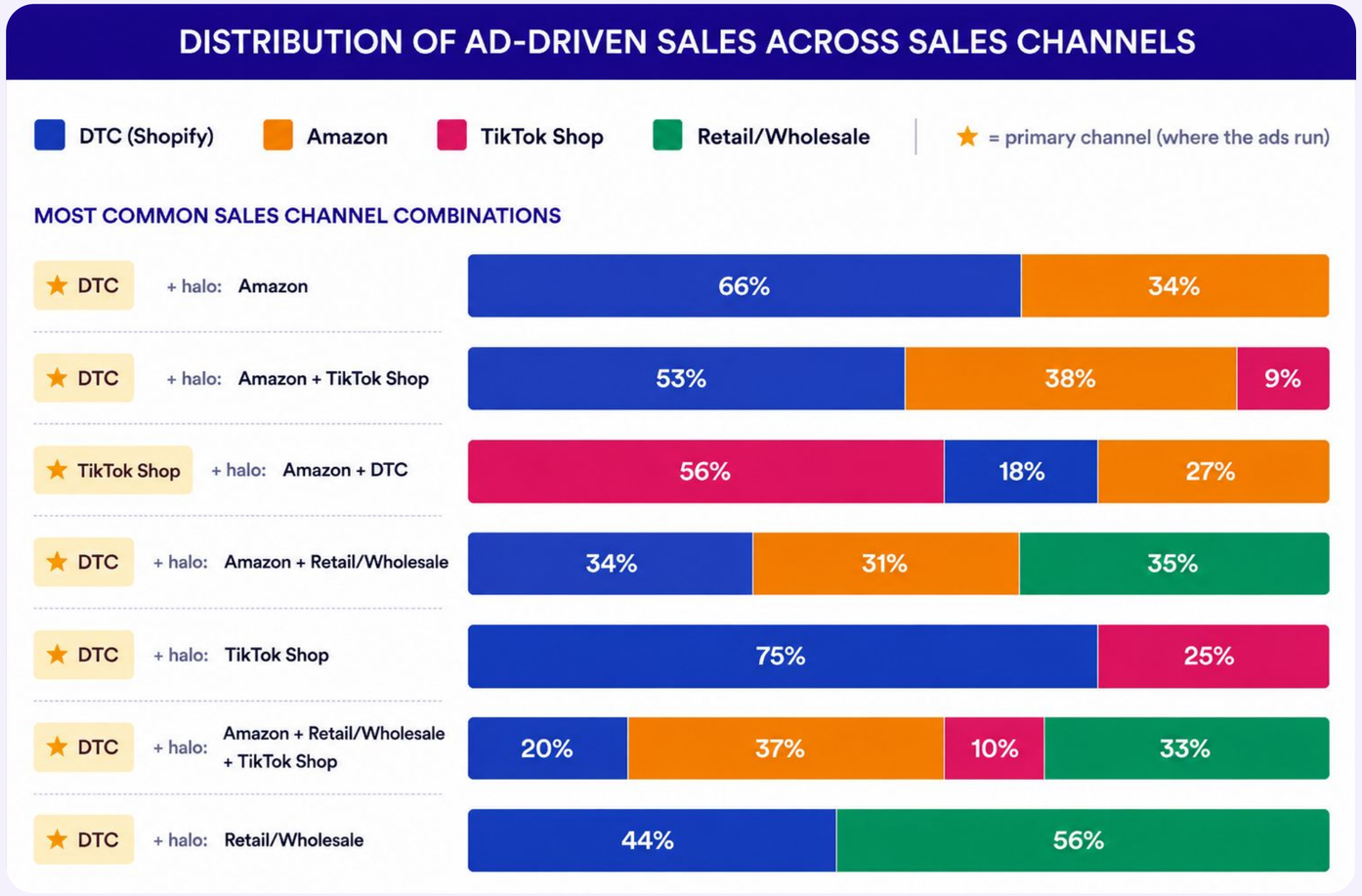
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Ad-Driven Sales Distribute Differently Across Sales Channel Mixes

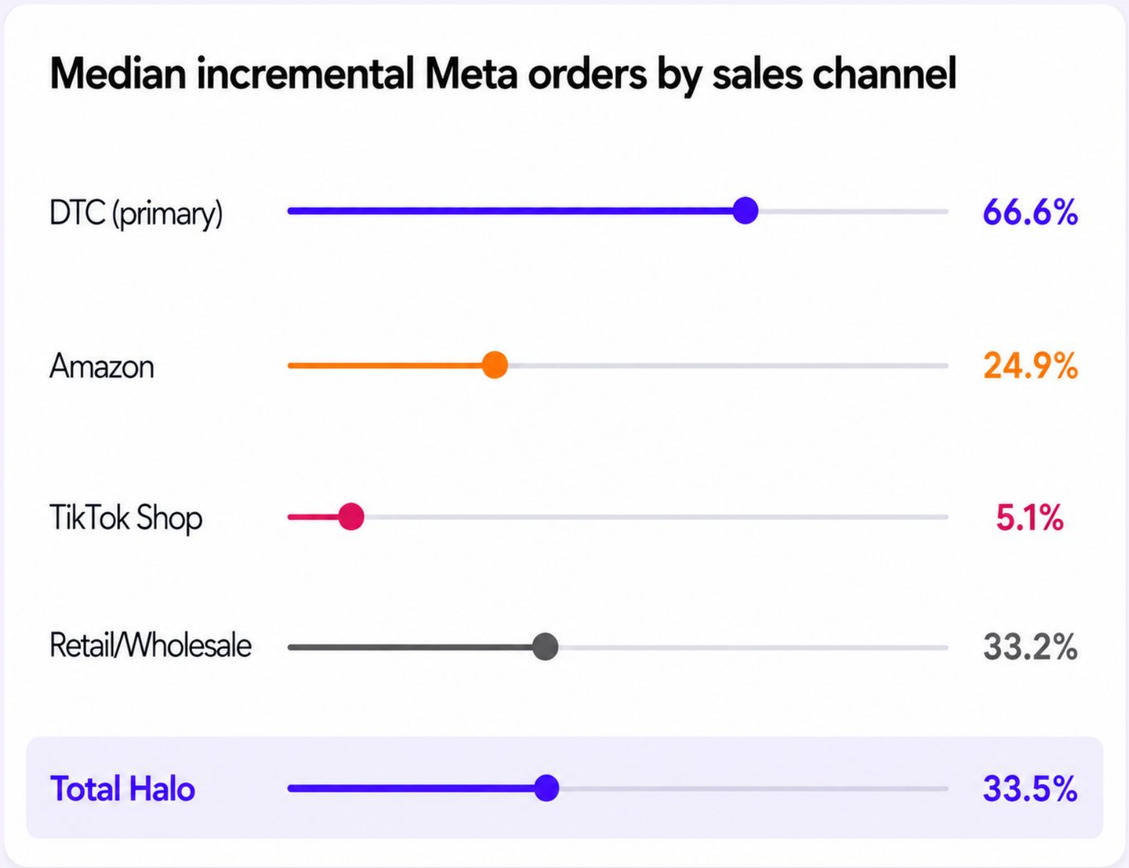
The number of sales channels explains part of halo effect variation, but the specific mix matters as well.

These distributions show where ad-driven sales occurred across the most common mixes among WorkMagic customers.

While some combinations drive the majority of sales in primary channels like DTC (or in GMV Max's case, TikTok Shop), others drive sales into secondary channels like Amazon, retail, and more.



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Meta

33.5% Halo Effect

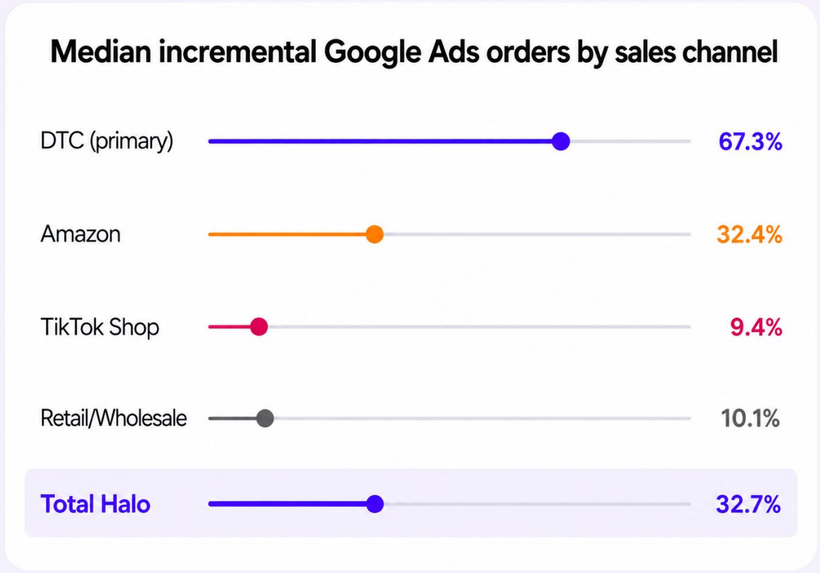
KEY FINDINGS

1. 1 in 3 Meta-driven incremental orders occur outside of DTC.

2. Meta's halo effect is broadly distributed across both Amazon and retail/wholesale, suggesting Meta creates broad omnichannel demand rather than concentrated in a single secondary channel.

3. Omnichannel incrementality reveals **2.6x higher revenue impact** than last-click attribution (1.25 iROAS vs. 0.48 ROAS).

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BY GOOGLE CAMPAIGN TYPE

Campaign Type	DTC (primary)	Amazon	TikTok Shop	Total Halo
YouTube	72.5%	23.0%	11.1%	30.8%
Search	69.0%	33.1%	—	31.0%
Other	68.4%	31.6%	—	20.5%
Demand Gen	47.5%	52.6%	—	52.5%
PMax	74.0%	27.6%	—	26.0%
Shopping	71.9%	32.4%	—	28.1%

Google

32.7% Halo Effect

KEY FINDINGS

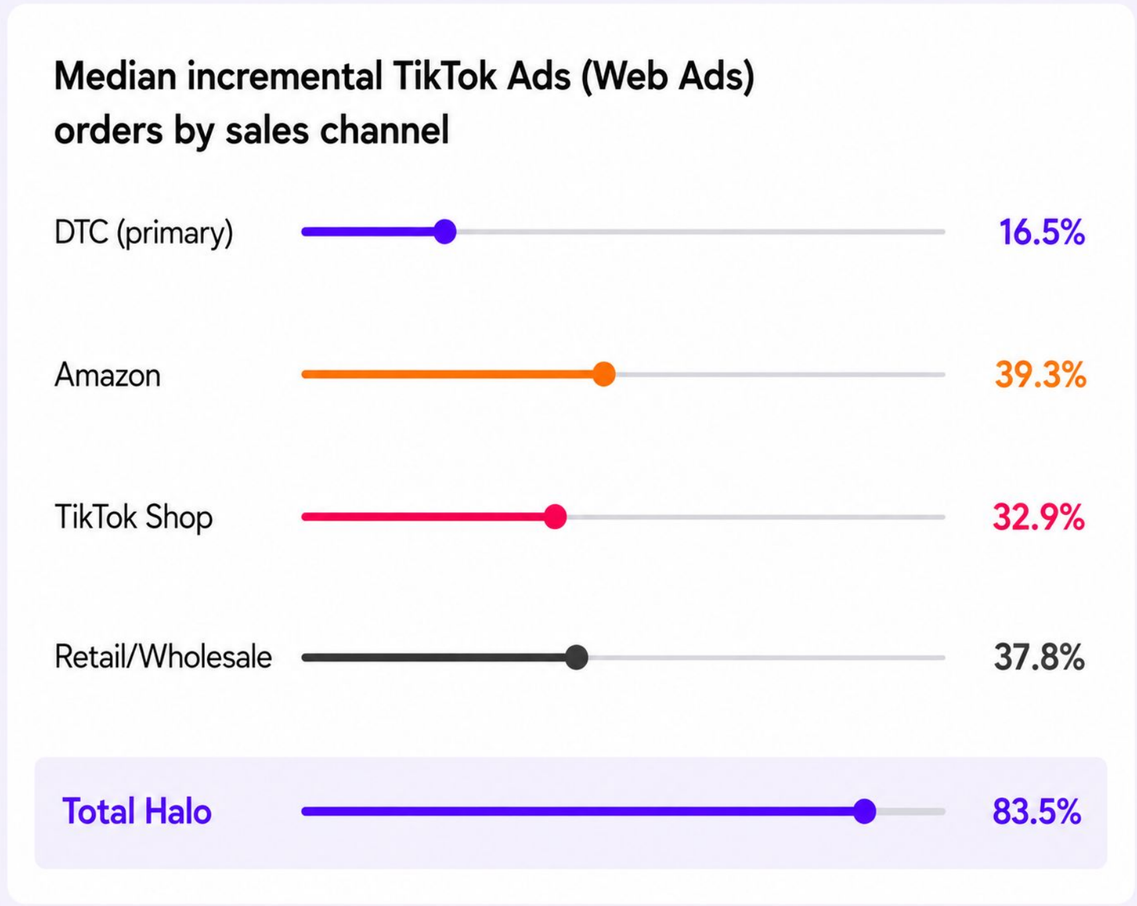
1. Nearly one-third of Google's incremental impact occurs outside DTC, with Amazon capturing the majority of observed halo.

2. Halo effect varies significantly by campaign type, ranging from 20.5% to 52.5%.

3. Demand Gen is the only Google campaign type where Amazon captures more incremental orders than DTC.

4. Google's halo effect significantly accounts for measurement blind spots, with omnichannel incrementality revealing **81% more revenue impact** than last-click attribution (1.65 iROAS vs. 0.91 ROAS).

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Note: Brands in this sample derived a median 29% of total sales from DTC. Brands with higher DTC concentration will likely see lower halo.

TikTok Web Ads

83.5% Halo Effect

KEY FINDINGS

1. 83.5% of incremental orders occurred outside DTC, reflecting a sample of heavily omnichannel brands where a median 71% of total sales happen off-DTC. Brands with a more DTC-focused sales mix should generally expect lower halo.

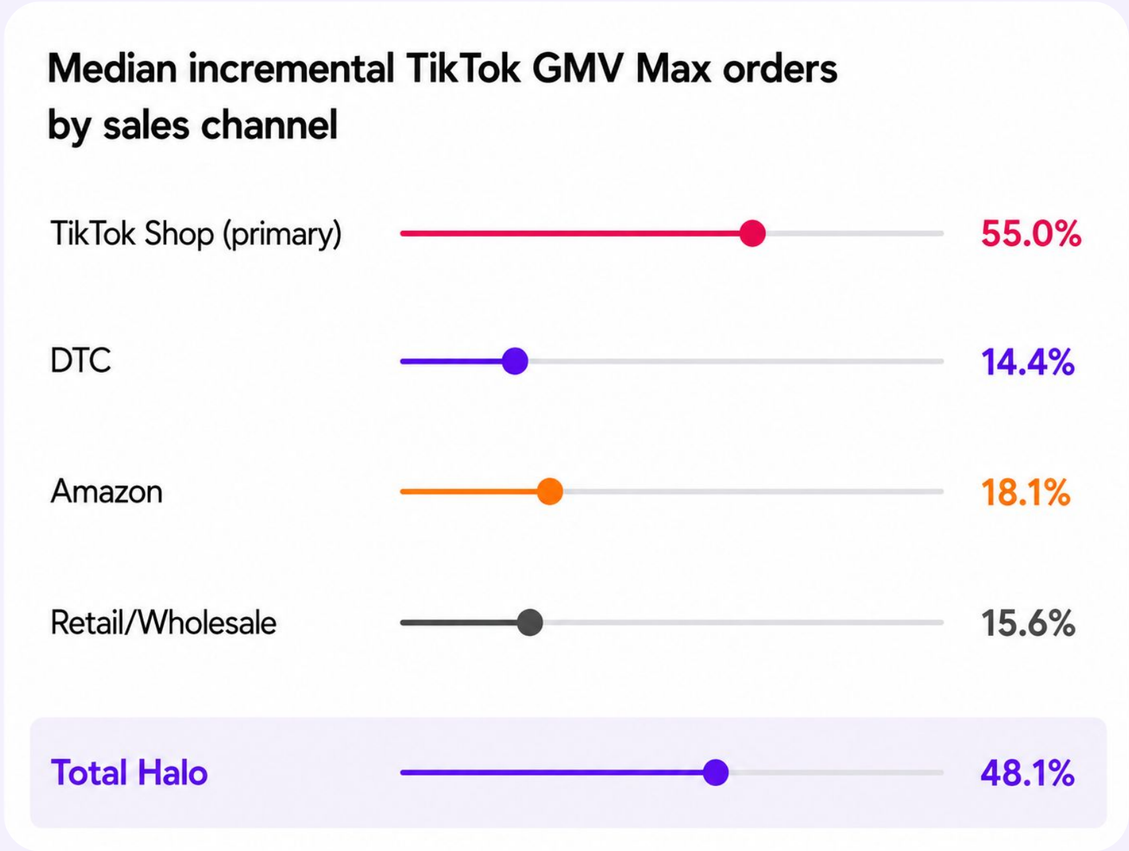
2. TikTok Web Ads distribute demand broadly across Amazon, TikTok Shop, and retail/wholesale at similar levels.

3. TikTok Web Ads exhibit the highest halo effect observed in the study, demonstrating their role in driving purchases across the broader commerce ecosystem.

4. Traditional attribution misses the majority of TikTok Web Ads' impact, with omnichannel incrementality measuring nearly **4x more revenue** than last-click attribution (1.59 iROAS vs. 0.41 ROAS).

* Web Ads refers to ads that drive to a DTC website (excludes GMV Max campaigns)

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TikTok GMV Max

48.1% Halo Effect

KEY FINDINGS

1. Nearly half of GMV Max's incremental impact occurs outside TikTok Shop (48.1%).

2. Compared to TikTok Web Ads, GMV Max drives a larger share of incremental orders through its primary sales channel (TikTok Shop) while still generating substantial halo across other sales channels.

3. Amazon (18.1%), retail/wholesale (15.6%), and DTC (14.4%) each capture meaningful shares of halo.

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Pinterest / AppLovin / Snapchat

25-32% Median Halo Effects

Pinterest



Traditional attribution captures only a fraction of Pinterest's business impact. Omnichannel incrementality measures **2.16 more revenue per dollar spent** than last-click attribution (2.32 iROAS vs. 0.16 ROAS).

AppLovin



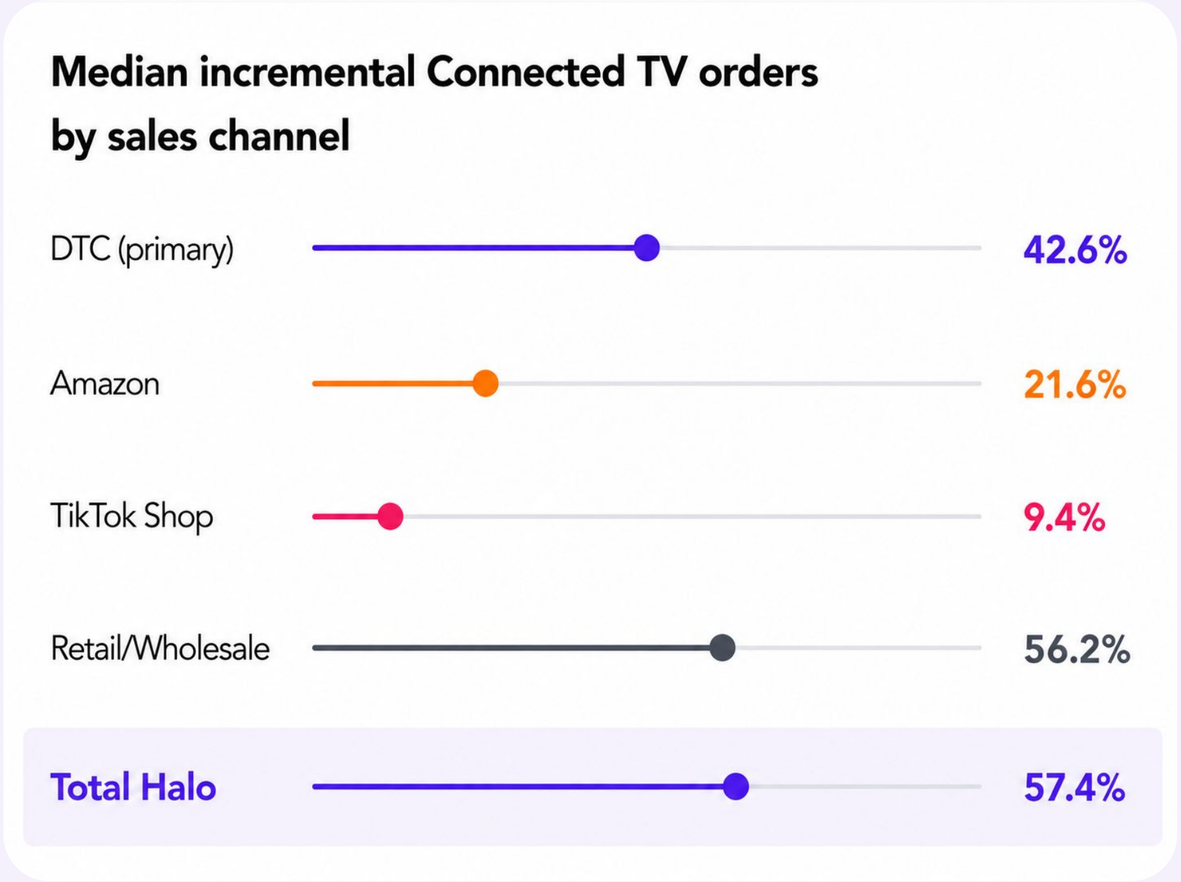
AppLovin's 28.5% halo contributes to a **0.44 increase in revenue per dollar spent** versus last-click attribution (1.36 iROAS vs. 0.92 ROAS).

Snapchat



Snapchat's halo effect contributes to **1.10 more revenue per dollar spent** than reported by last-click attribution (1.47 iROAS vs. 0.37 ROAS).

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CTV

57.4% Halo Effect

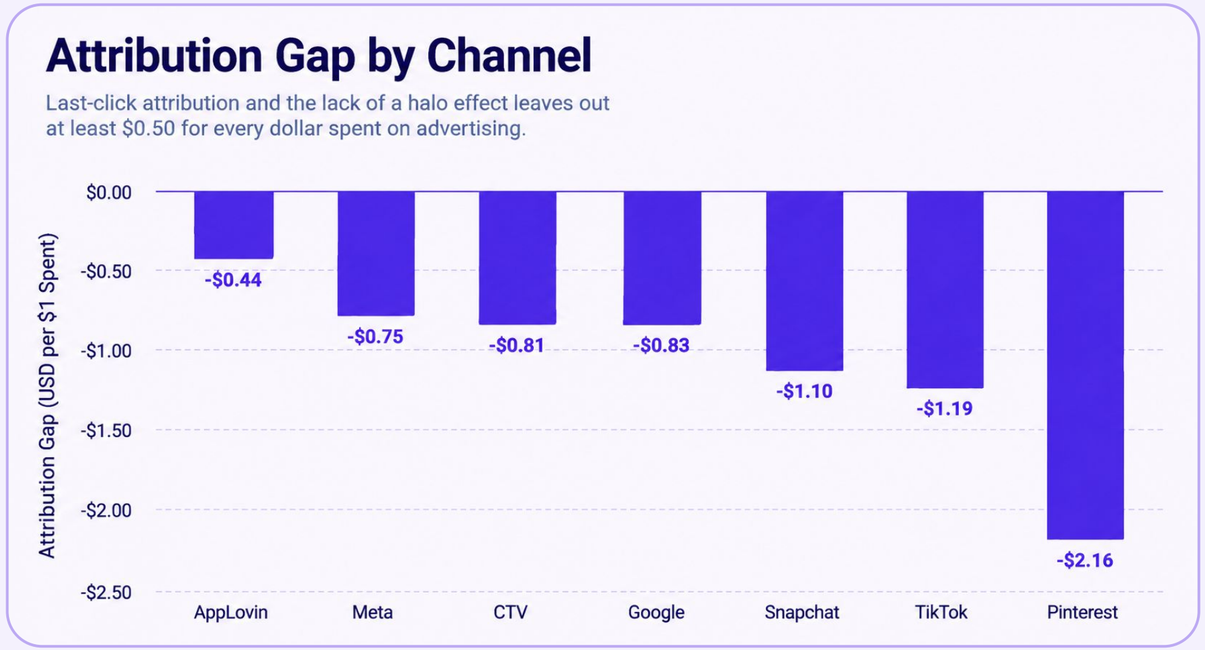
KEY FINDINGS

1. 57.4% of CTV's incremental impact occurs outside DTC, making it one of the highest-halo channels in the study.

2. Retail/Wholesale captures the largest share of CTV-driven halo (56.2%), showing CTV creates demand that frequently resolves through physical retail channels.

3. When accounting for halo effect, last-click attribution underreports CTV impact **by $0.81 for every dollar spent on the channel**.

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Attribution Gap by Channel

$2.16 for Every Dollar Spent

One pattern was consistent in the data:

Ignoring the halo effect leads to significant under-attribution across every channel.

This gap ranged from $0.44 in incremental impact for AppLovin to as much as $2.16 for every dollar spent on Pinterest.

When this much business impact goes unmeasured, every optimization and budget allocation decision is made with incomplete information.

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Halo Effect by Industry



KEY FINDINGS

1. Halo effect varies more than 2x across industries, ranging from 24% to 57%.
2. Health & Wellness and Pet Products show the strongest tendency for ad-driven demand to resolve on Amazon.
3. Apparel & Fashion and Home & Living retain the highest concentration of ad-driven sales on DTC.
4. Consumable products exhibit some of the highest halo effects observed in the study, with Health & Wellness and Food & Beverage both exceeding 50%.

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Benchmarks Show Patterns.
They Don’t Measure Your Business.

Every business is unique.

Your customers, sales channels, advertising strategy, and distribution footprint all shape your advertising’s true business impact.

The benchmarks in this report reveal patterns, but they cannot tell you what’s true for your business.

Measure your own business to uncover the truth.

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This report tells you what's likely true.

Incrementality testing tells you what’s actually true.

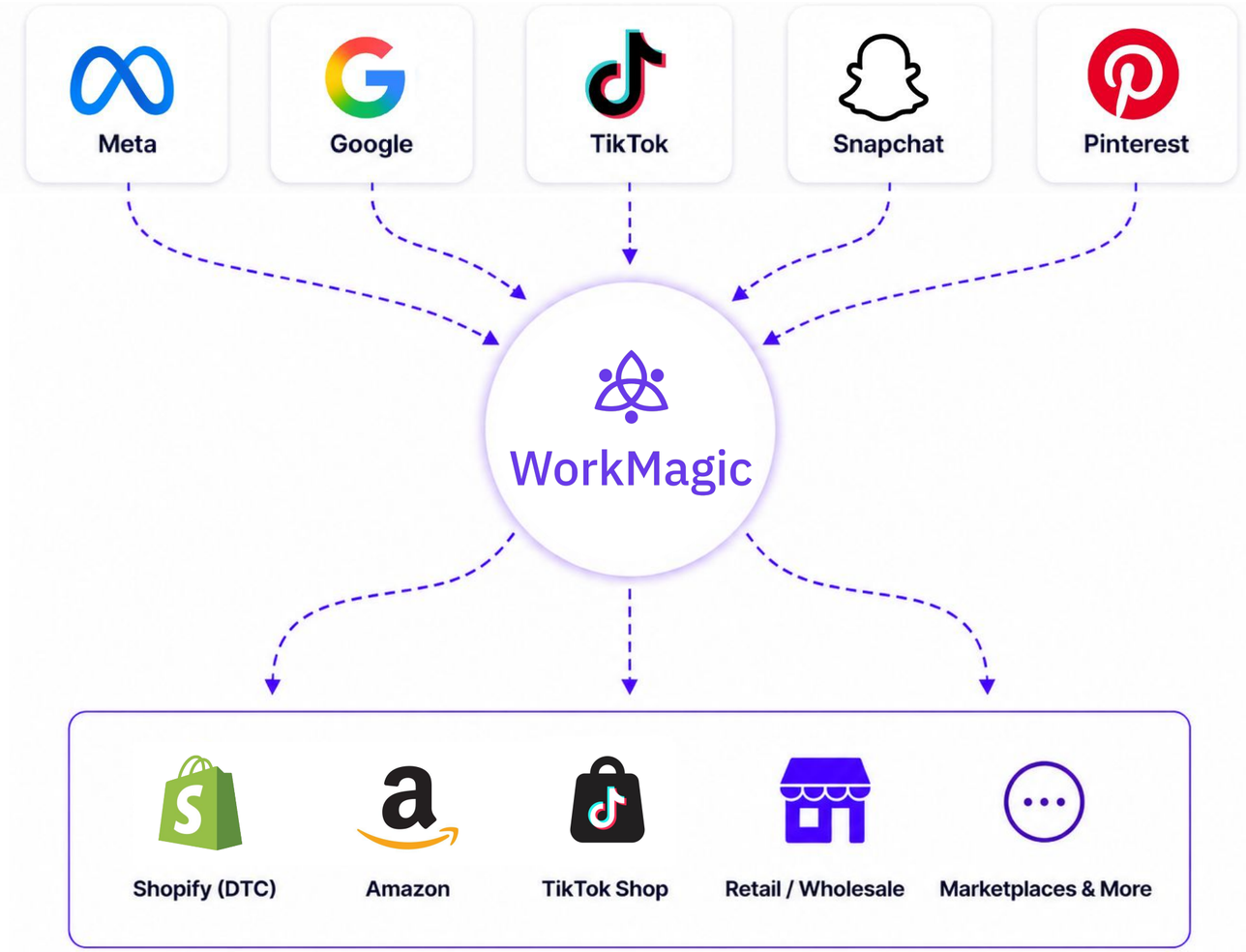
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WorkMagic Measures Advertising's Total Business Impact

Advertising's impact doesn't stop at your DTC website.

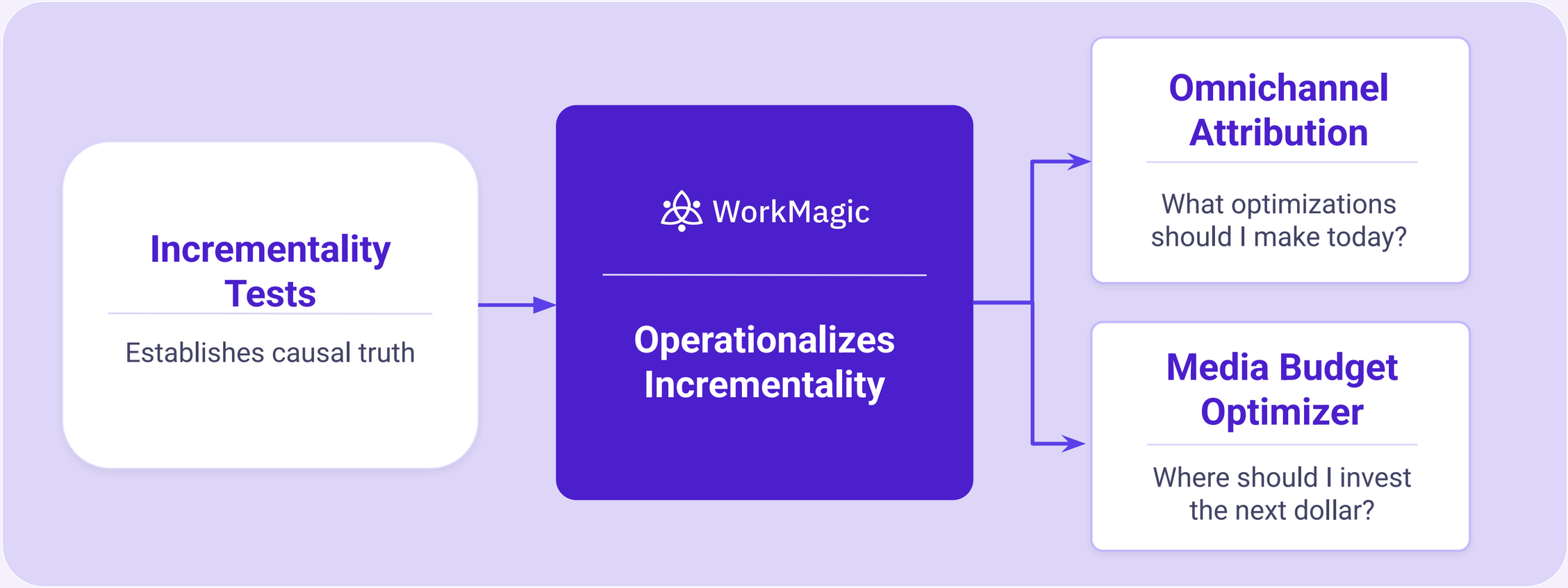
Your measurement shouldn't either.

- ✓ **Measures** beyond your DTC website
- ✓ **Eliminates** measurement blind spots
- ✓ **Creates** a single source of truth
- ✓ **Improves** optimization & capital allocation



Incrementality testing establishes causal truth.

WorkMagic operationalizes it.



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Brand Spotlights

See how leading brands are using omnichannel measurement to make better decisions.

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Case Study

Fenty Beauty: 87% TikTok-driven Incremental Sales Occurred Off-platform

Brand: Fenty Beauty

Objective: Quantify TikTok Shop's cross-channel impact on DTC and offline retail and validate it as a true growth driver.

Solution: Geo Incrementality Test

Results: 87% of TikTok-driven incremental sales came from the halo effects across Sephora, Ulta Beauty, and the brand's website. Over **1/3** of incremental sales came from new customers.

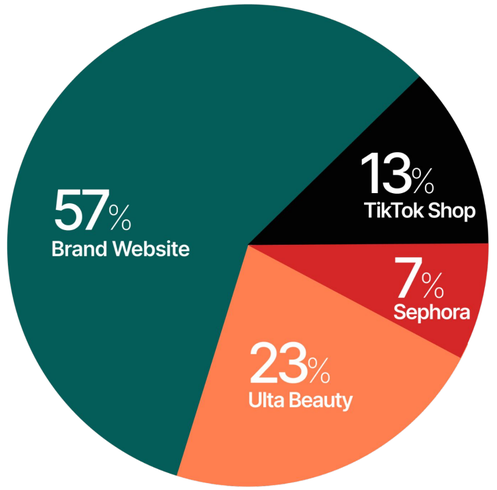
Business Impact: **Uncovered how TikTok drove brick-and-mortar sales and underlined its true value in the media mix**

[Read the Full Case Study]

FENTY BEAUTY



Breakdown of TikTok's Impact Across Sales Channels



- TikTok-driven incremental sales through Sephora stores
- TikTok-driven incremental sales through Ulta Beauty stores
- TikTok-driven incremental sales on the brand's website
- Direct conversions on TikTok Shop

Source: TikTok for Business website

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Case Study

Lifepro: Tripled Meta Spend with Actual iROAS Within 2.2% of Prediction

Brand: Lifepro, an omnichannel wellness brand with growing Amazon presence

Objective: Validate Meta impact before scaling ad spend for BFCM

Solution: Incrementality Test + Budget Optimizer

Results:

- **58%** of Meta-driven sales occurred on Amazon
- **65%** lower iCPA when halo impact was included

Business Impact: **Tripled Meta spend during BFCM to great effect, with actual iROAS landing within ~2.2% of WorkMagic's predicted outcome**

[Read the Full Case Study]

lifepro



Breakdown of Meta's Impact Across Sales Channels



Direct conversions on the brand's Shopify store

Meta-driven incremental sales on Amazon

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Case Study

Salt & Stone: 67% of YouTube-Driven Sales Occurred on Amazon

Brand: Salt & Stone, a premium body care brand with the #1 deodorant on Amazon

Objective: Measure how YouTube-exposed audiences drove off-platform sales

Solution: Geo Incrementality Test

28

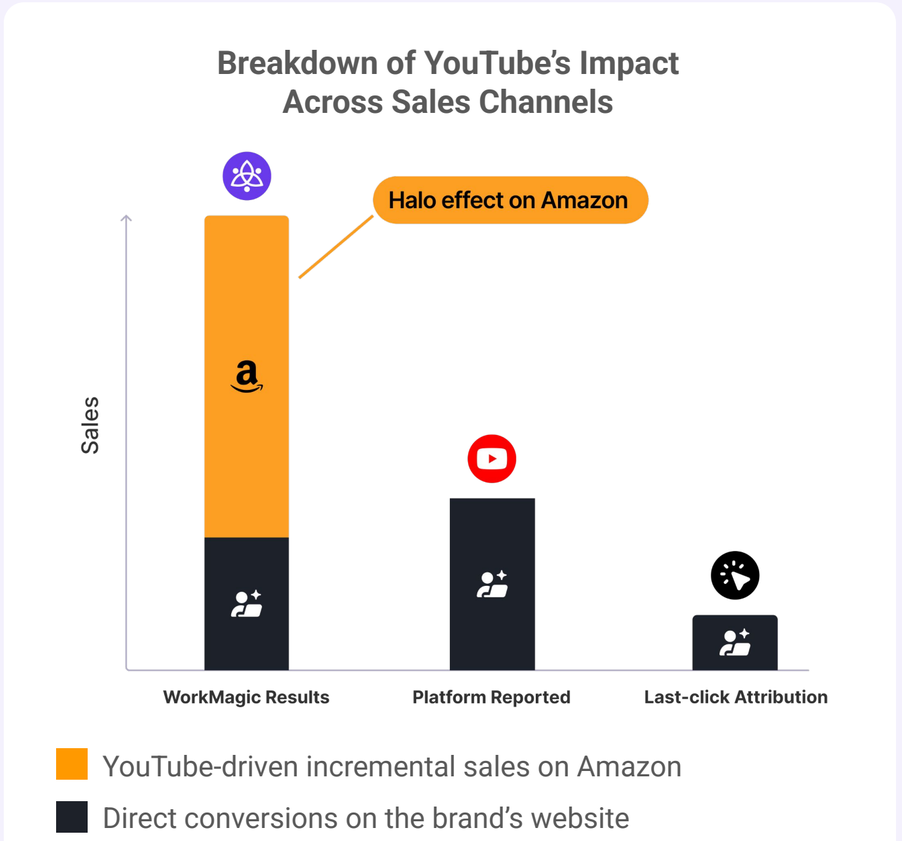
Results: 67% of YouTube-driven sales occurred on Amazon, making the combined iROAS 182% higher with the halo effect included

Business Impact: **Salt & Stone repositioned YouTube as a strategic growth channel by uncovering its off-platform sales impact**

[Read the Full Case Study]

SALT & STONE





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Case Study

Semaine: Pinterest's 87% Total Halo Effect on Walmart and Amazon

Brand: Semaine Health, a hormone health and wellness brand.

Objective: Validate Pinterest's effect on downstream sales by measuring potential halo on Amazon and Walmart

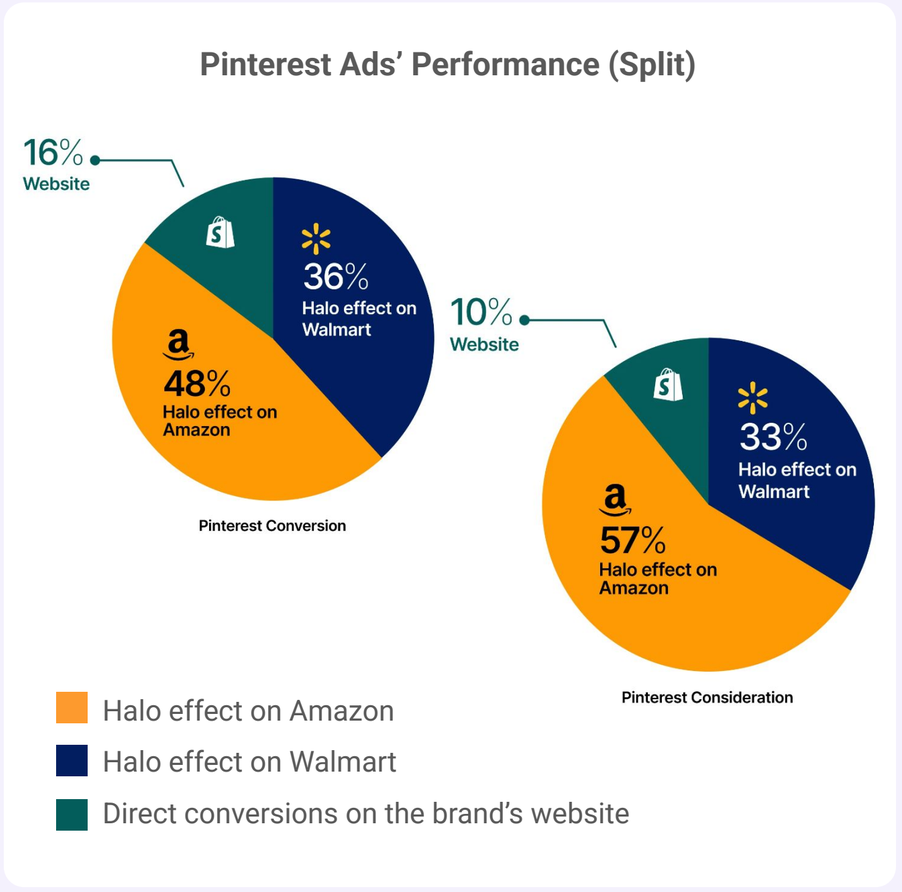
Solution: 3-cell Pause-to-Measure Incrementality Test

Results: Pinterest was driving 87% of its orders through halo effects on Amazon and Walmart - both Conversion and Consideration ads had significant effect on off-platform sales.

Business Impact: **Semaine scaled spend towards Pinterest after validating that it was significantly contributing to total business growth**

[Read the Full Case Study]





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Traditional attribution is built on observed DTC clicks.

The future of attribution is grounded in omnichannel causal truth.

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Consumers don’t buy in silos.

Neither should your measurement.

Book a demo



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