

GOLDIE'S GUIDE TO GREAT ROI

A PAYBACK PUBLICATION



PROJECT SUPPORT

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D & D Consultants

WPP AUNZ
Group M

group^m

Gain Theory
Global marketing effectiveness consultancy

GAIN
THEORY

THE HISTORY OF THE PAYBACK SERIES



Phase 1: The Australian media and marketing community's first large-scale market-mix modelling project comprising three years of raw sales and campaign data generated by 21 advertisers with a collective spend of more than \$500m



Phase 2: Specific modelling of the finance, auto and FMCG sectors



Phase 3: An investigation into the optimal media mix for each sector



Phase 4: Market mix modelling on the relationship between Total TV and search and how Total TV can ignite brand growth for digital-first enterprises



NOW: Marketing mix modelling of media's ability to generate sales demand across both the short- and long-term by analysing 60 brands with annual sales turnover of \$23b, nine media channels with total annual spend of \$450m and 850+ ROI observation



NEXT (by July 2021): An exploration of contrasting optimal media deployment that take in a range of key business marketing and media considerations

QUESTIONING THE STATUS-QUO

Extensive global research has established Total TV is best when it comes to driving long-term brand growth.

- But can Total TV also deliver sales demand in the short-term?
- Is performance-based digital media the best way to generate immediate sales or...
- Can Total TV generate the same outcomes in the short-term with the added bonus of continuing to work long after an ad has aired?



WHY ARE SHORT-TERM SALES SO IMPORTANT?



Businesses are always under pressure to deliver sales right now



For smaller businesses, the ability to generate immediate sales demand can often be critical to their survival and long-term success



Total TV is not always top-of-mind when marketers are looking for an immediate sales effect



Total TV can play a supportive role that is often misattributed: maintaining top of mind awareness, haloing trust and making other media channels more effective



Online purchasing has led businesses to attribution modelling to measure sales effect. As Total TV exists outside the digital ecosystem, attribution modelling undervalues its role

OBJECTIVES OF THIS STUDY

- a. What can marketers expect to achieve in the **short-term**?
- b. What are the comparative **strengths and weaknesses of media platforms** in terms of short-term sales demand?
- c. To enable media to be selected based on sales performance -
 - Comparative **ROI** over different timeframes
 - Media-driven **incremental sales** contributions
 - **Diminishing returns** for each platform



THE LARGEST MEDIA MARKET MIX MODEL CONDUCTED IN AUSTRALIA



60

BRANDS WITH
A TOTAL ANNUAL
TURNOVER
OF \$23B



WITH \$450M
TOTAL ANNUAL SPEND



850+

ROI OBSERVATIONS
ACROSS MULTIPLE YEARS
AND MEDIA CAMPAIGNS



10 CATEGORIES INDIVIDUALLY REPORTED



**ALCOHOLIC
BEVERAGES**



**AUTO
SECTOR**



**DURABLE
HH GOODS**



**NON-DURABLE
HH GOODS**



**FAST MOVING
CONSUMER
GOODS**



**RETAIL
SECTOR**



**TRAVEL
SECTOR**



**FINANCIAL
SERVICES**



**UTILITIES & SUBSCRIPTION
SERVICES**



**GOVERNMENT &
OTHER SERVICES**

9 MEDIA CHANNELS INDIVIDUALLY ANALYSED



TOTAL TV



SEARCH



DIGITAL VIDEO



SOCIAL MEDIA
(FACEBOOK)



DIGITAL DISPLAY



OOH



PRINT



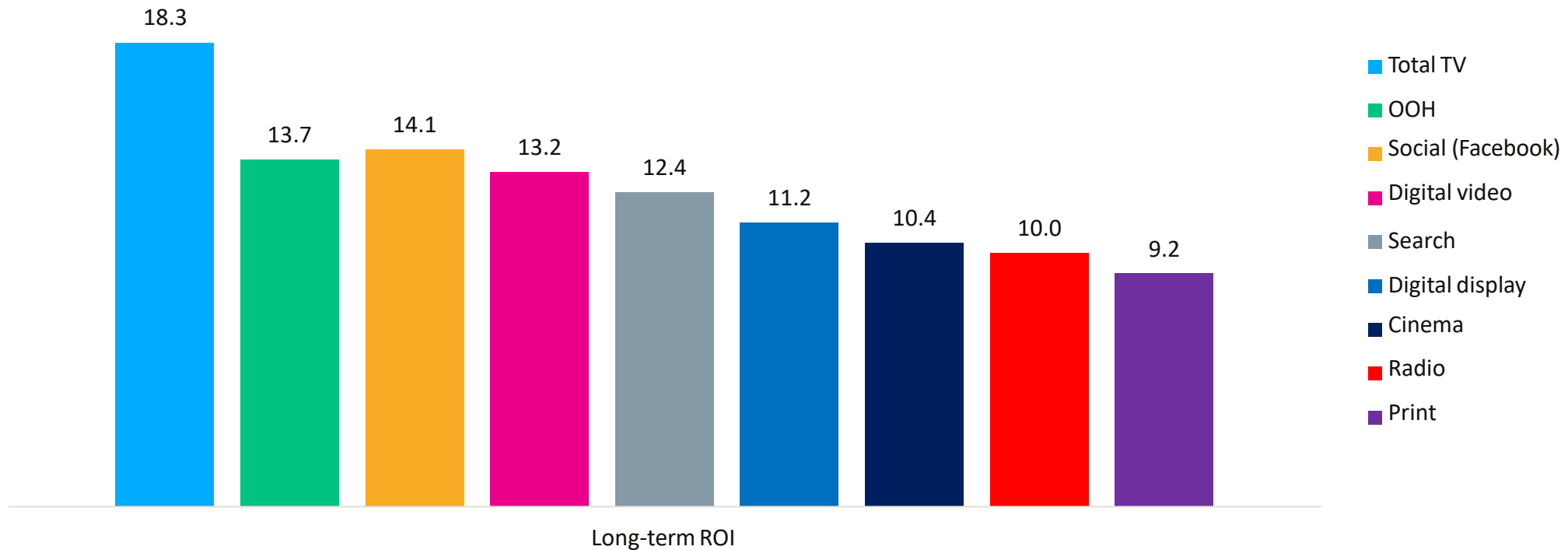
CINEMA



RADIO

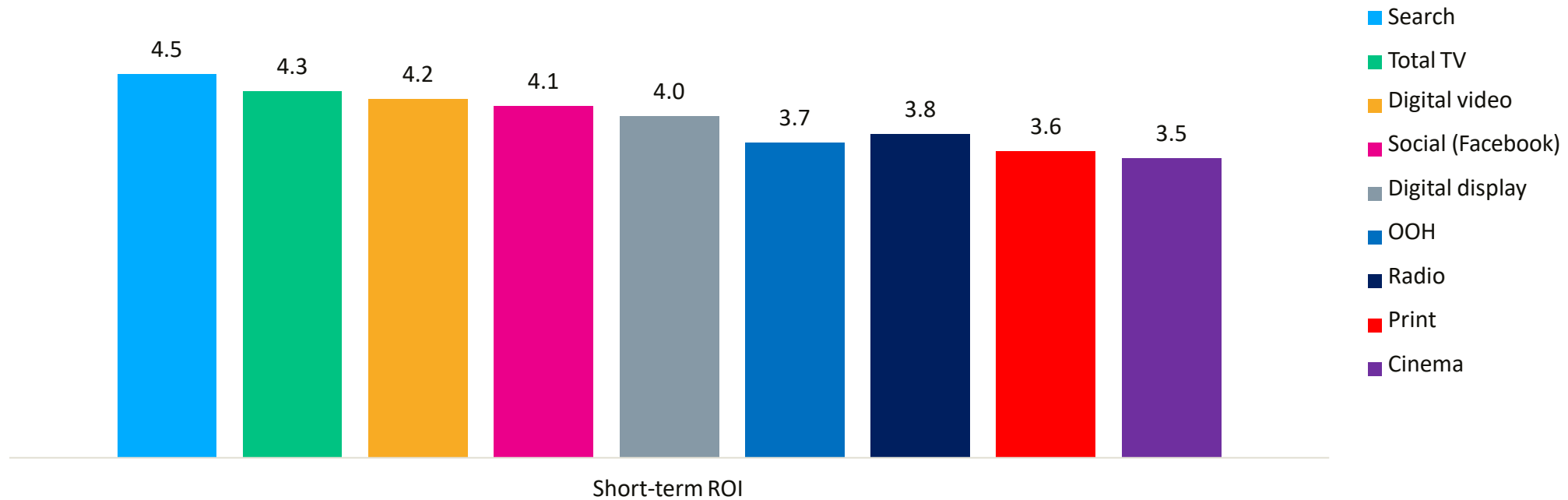
INVEST \$1 IN TOTAL TV AND GET \$18.30 BACK THAT'S \$4.20 MORE THAN THE NEXT BEST CHANNEL

Average long-term ROI
(Across 60 brands)



INVEST \$1 IN TOTAL TV AND GET \$4.30 IN THREE MONTHS

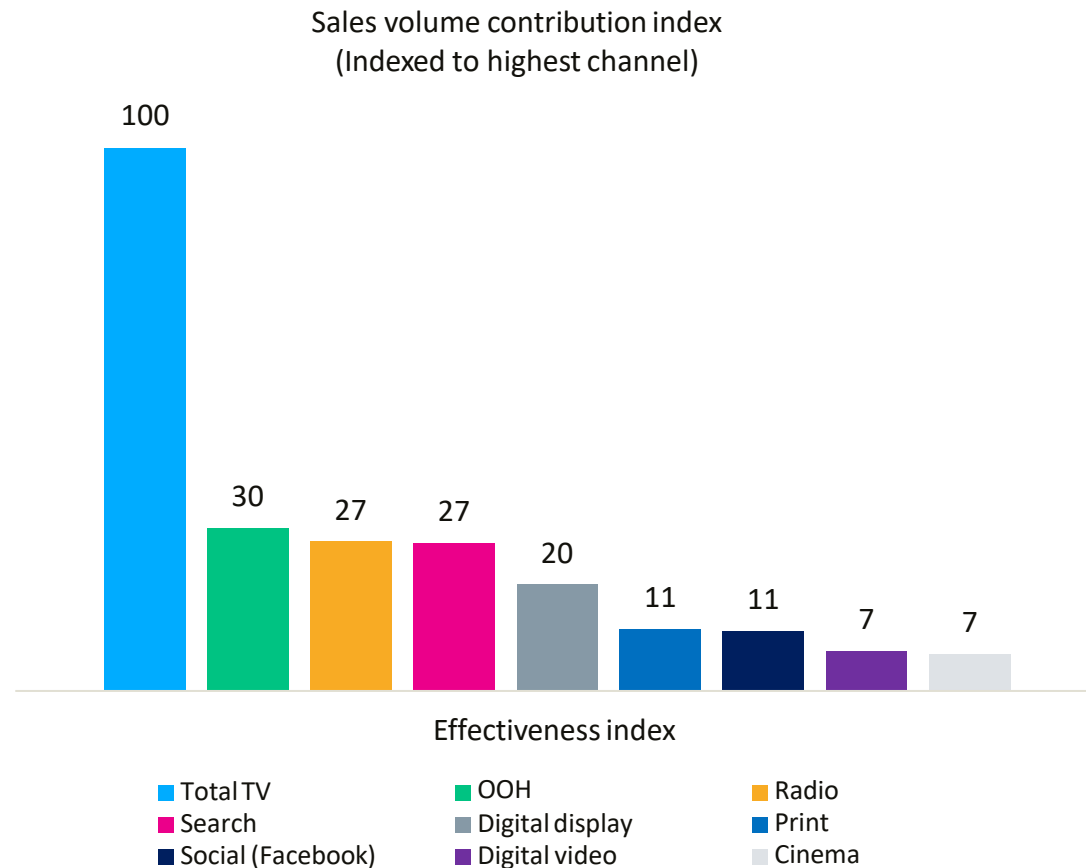
Average short-term ROI
(Across 60 brands)



Source: 'Demand Generation', Feb 2021, Mindshare/MediaCom/Wavemaker/GroupM/Gain Theory

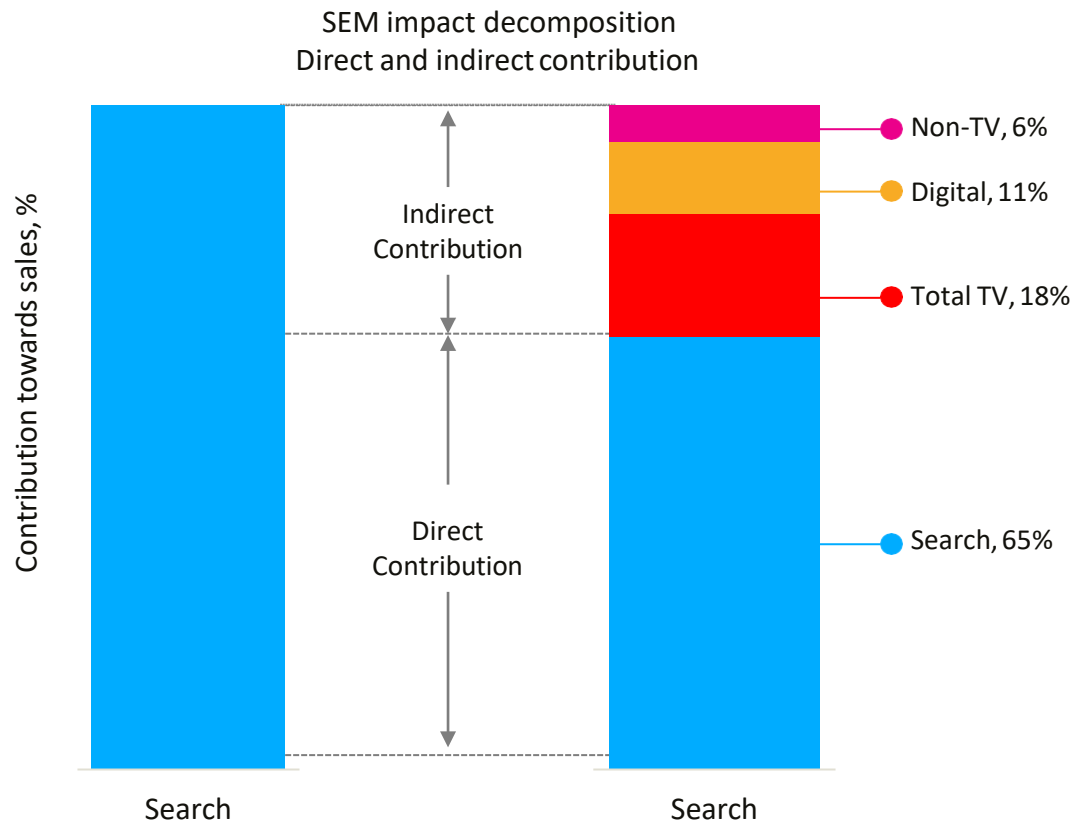


TOTAL TV DRIVES **3X MORE SALES** VOLUME THAN ANY OTHER MEDIA



Not only does Total TV deliver great ROI in the short and long-term, but Total TV also drives 3x greater sales volume than any other media

TOTAL TV IS THE NUMBER 1 DRIVER OF SEARCH



Total TV is fundamental to the sales demand derived from search contributing 18% towards the sales impact

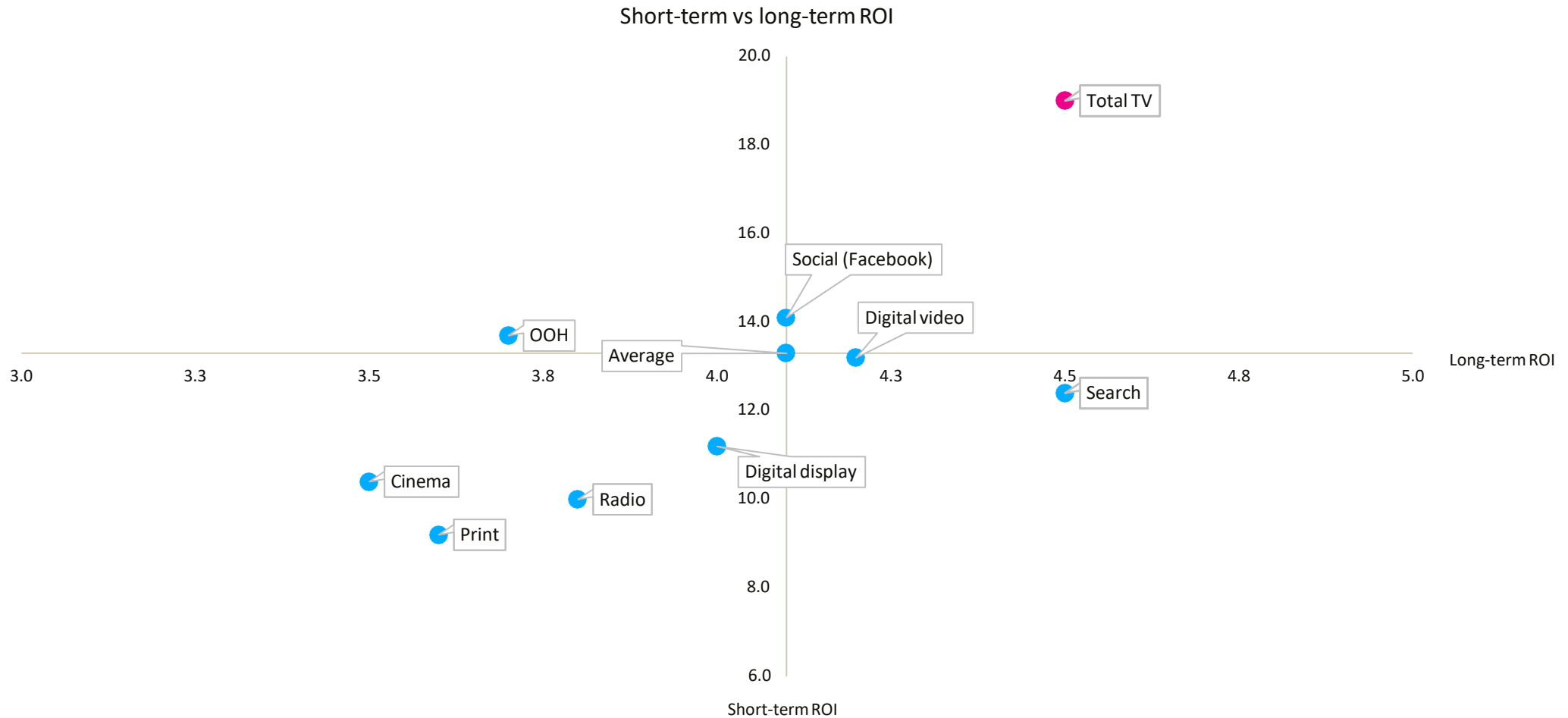
TOTAL TV MAKES OTHER CHANNELS MORE EFFECTIVE

Cross-channel synergy effect

	Total TV	Search	Social (Facebook)	Non-TV*	Display	Video
Total TV		7.13%	6.02%	5.31%	5.28%	4.67%
Search	7.13%		1.46%	1.30%	1.29%	0.98%
Social (Facebook)	6.02%	1.46%		1.01%	1.15%	0.99%
Non_TV*	5.31%	1.30%	1.01%		0.82%	0.59%
Display	5.28%	1.29%	1.15%	0.82%		0.73%
Video	4.67%	0.98%	0.99%	0.59%	0.73%	

Note: *Non-TV is made of OOH, Cinema, Radio, and Print

TOTAL TV IS IN ITS OWN (GOOD) PLACE WITH STRONG SHORT- AND LONG-TERM ROI



Source: 'Demand Generation', Feb 2021, Mindshare/MediaCom/Wavemaker/GroupM/Gain Theory

GOLDIE'S GUIDE TO GREAT ROI

1

Invest \$1 in Total TV and get \$4.30 back in three months

2

Total TV drives 3x greater sales volume than any other media

3

Invest \$1 in Total TV and get \$18.30 back in the long-term.
That's \$4.20 more than the next best channel

4

Total TV is the number 1 driver of search

5

Total TV is best at making other channels more effective

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