

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

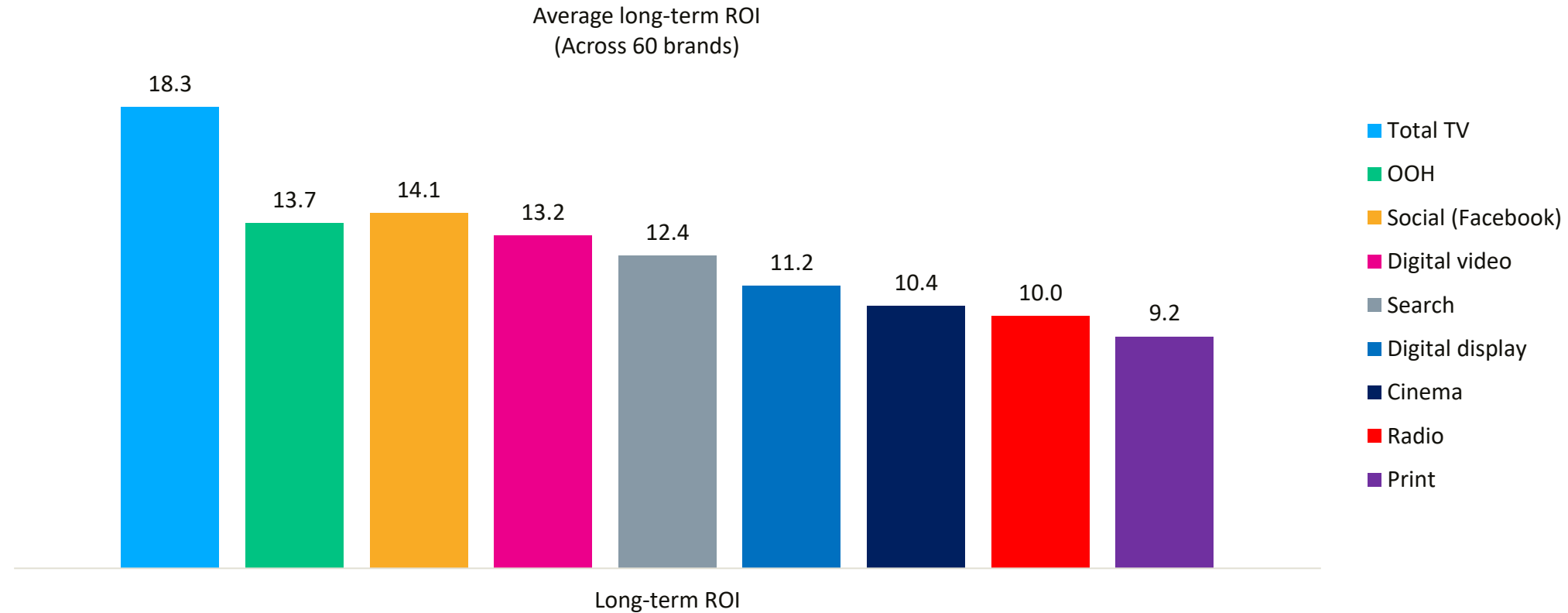


CINEMA



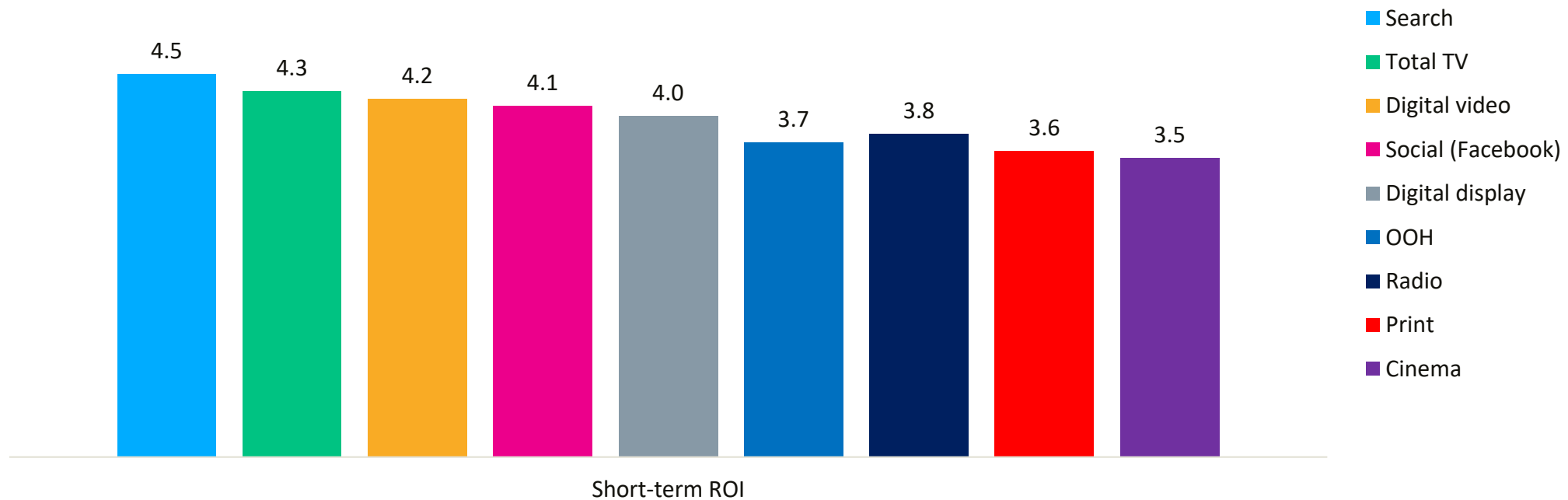
RADIO

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

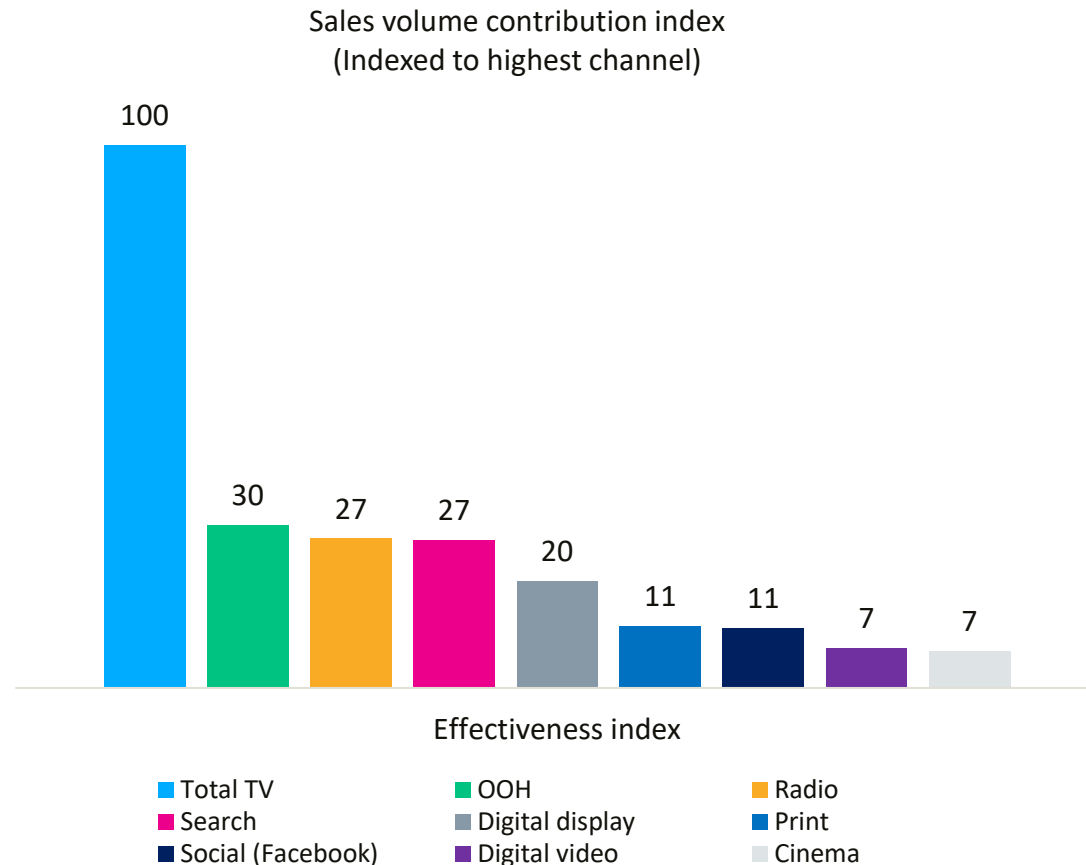


INVEST \$1 IN TOTAL TV AND GET \$4.30 IN THREE MONTHS

Average short-term ROI
(Across 60 brands)

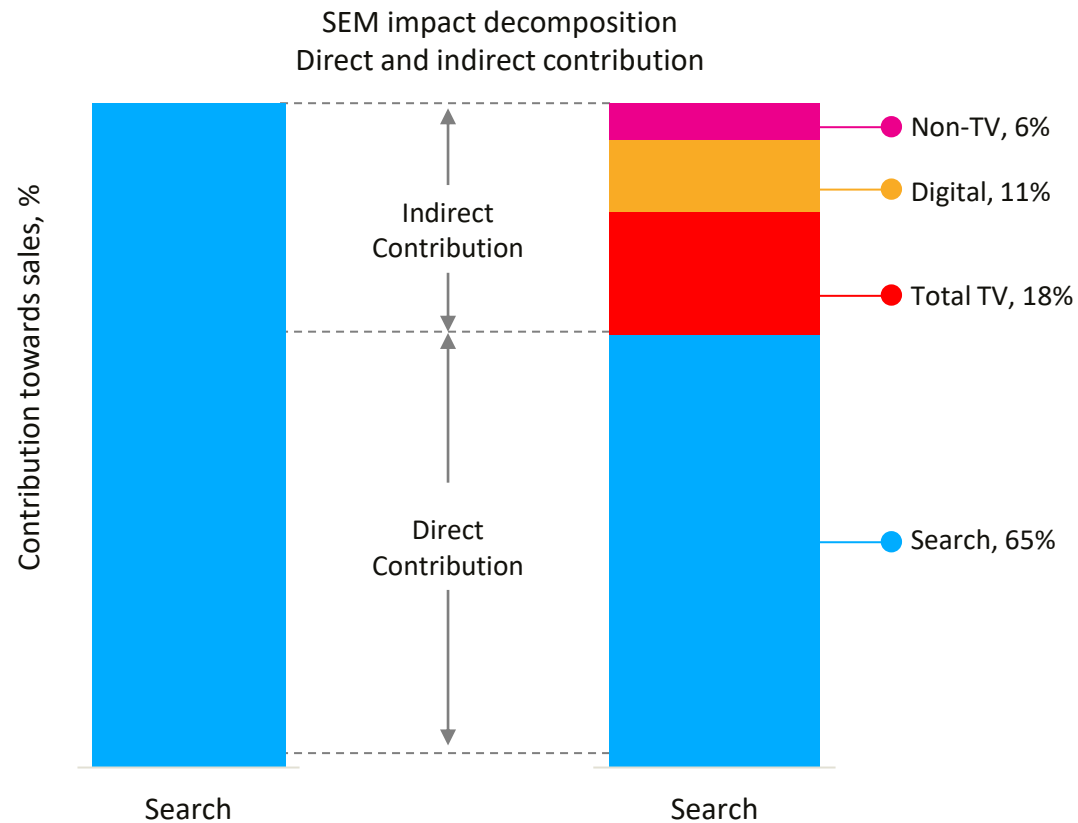


TOTAL TV DRIVES 3X MORE SALES VOLUME THAN ANY OTHER MEDIA



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

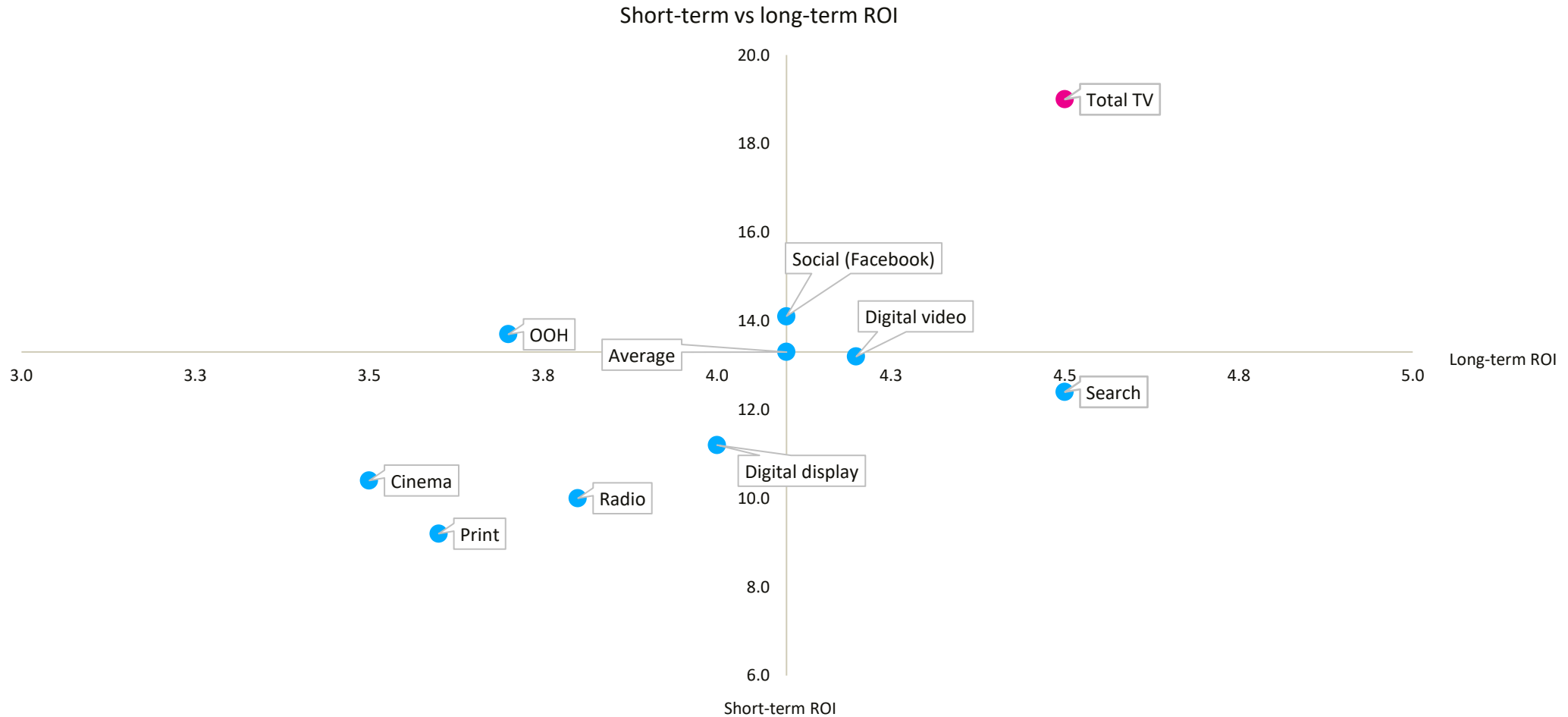
TOTAL TV MAKES OTHER CHANNELS MORE EFFECTIVE

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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