



think 



KANTAR

More media muscle for Retail Brands

Optimising cross-channel interaction for greater effectiveness



THE
BENCHMARK SERIES

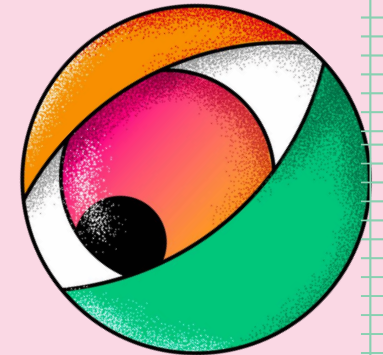
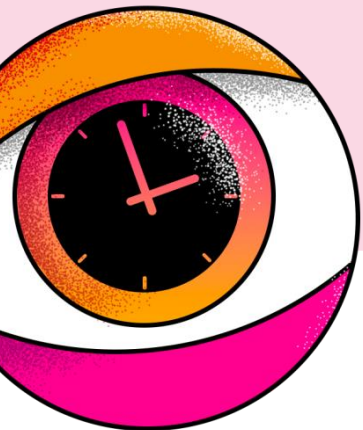
A NEW STANDARD IN MEASURING THE TRUE IMPACT OF ADVERTISING

The Benchmark Series: Cross Channel Interaction

Now in its 7th year of reporting, The Benchmark Series seeks to challenge common assertions around what works and doesn't work in media.

Working with academia, it identifies how the various attributes of video advertising deliver growth for advertisers.

In association with Macquarie University and Kantar Research, the 2023 edition of Benchmark investigates how media work together and how certain media are crucial for other media to be effective.



THE
BENCHMARK SERIES
A NEW STANDARD IN MEASURING THE TRUE IMPACT OF ADVERTISING

■ Optimising channel multiplier effects for greater impact

In 2021, ThinkTV published the synergy effect that various channels have on other channels. It showed that a media pairing containing TV would generate greater campaign synergies than any other media combination.

This edition of the Benchmark Series looks at how much a media channel relies on multiplier effects to generate an impact, which media combinations work best at driving awareness, and which work best in performance marketing and demand conversion.

Cross-channel Synergy Effect

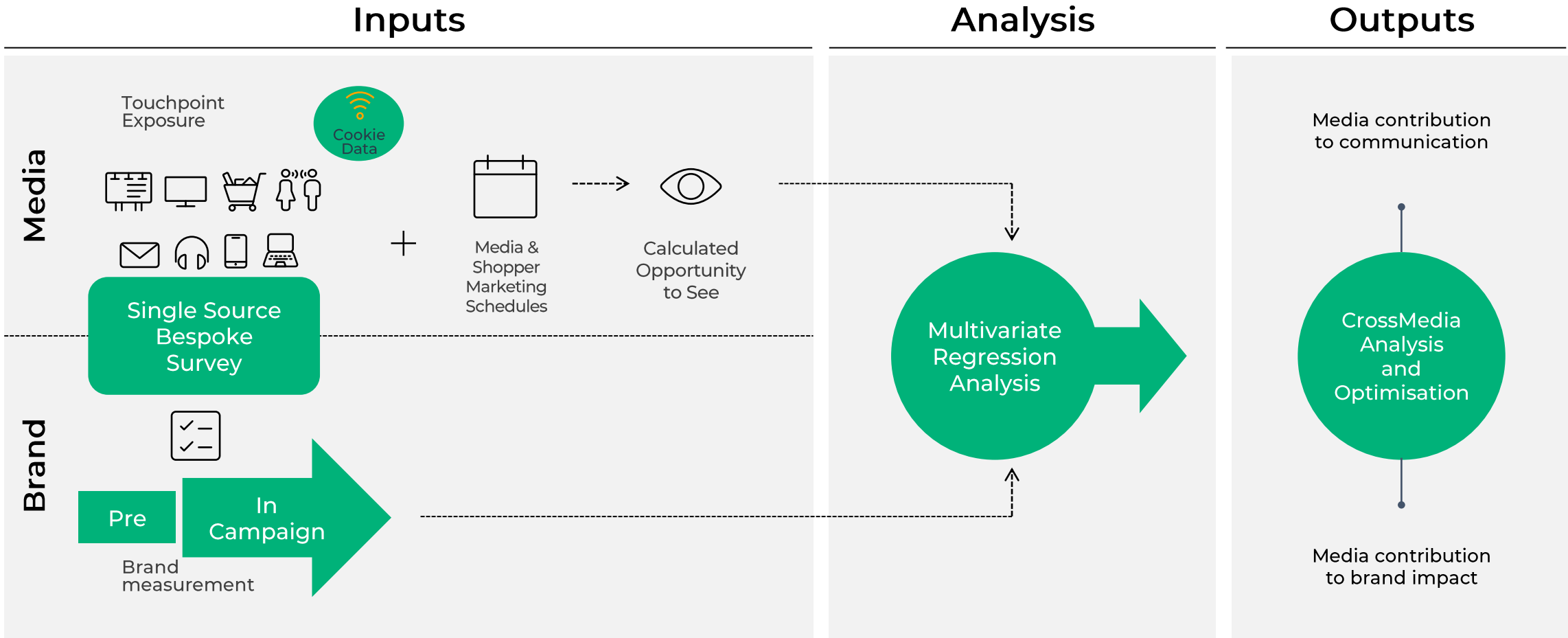
	TV	Search	Social	Non_TV*	Display	Video
TV		7.13%	6.02%	5.31%	5.28%	4.67%
Search	7.13%		1.46%	1.30%	1.29%	0.98%
Social	6.02%	1.46%		1.01%	1.15%	0.99%
Non_TV*	5.31%	1.30%	1.01%		0.82%	0.59%
Display	5.28%	1.29%	1.15%	0.82%		0.73%
Video	4.67%	0.98%	0.99%	0.59%	0.73%	

Note: *Non_TV is made of OOH, Cinema, Radio, and Print

Source: Beyond ROI: Optimising the media mix for maximum business growth. ThinkTV, 2021;
<https://thinktv.com.au/facts-and-stats/research-reveals-the-difference-between-efficient-and-effective-roi/>

■ This report is powered by a meta analysis of Kantar's CrossMedia database

179 live campaigns measured using Kantar's CrossMedia methodology. CrossMedia uses multivariate regression analysis to evaluate multichannel campaigns by isolating the impact of each channel and the interactions they derive for brand effectiveness.



■ Underpinning this report is...

179

Campaigns measured using

KANTAR

CrossMedia methodology

~180K

Survey responses giving us a robust framework for understanding campaign driven brand impact

... across all product categories

Food And Drink
Household Products
Personal Care
Financial Services
Airlines
Car Rentals
Leisure
Telco
Utilities

... brands of all sizes

Small
Medium
Large

Based on market share and brand awareness

... campaigns at different spend levels

Overall an average per campaign spend of AUD\$5.3 million

■ This report includes 4 industry verticals....

Food and Drink

Alcohol

Fast Food Retailers

F&D Consumer Packaged Goods

47 Campaigns

Consumer Packaged Goods

Alcohol

Fast Food Retailers

F&D Consumer Packaged Goods

Personal Care

Household items

75 Campaigns

Financial Services

Banking

Superannuation

34 Campaigns

Services

Financial Services

Telco

Utilities

Airlines

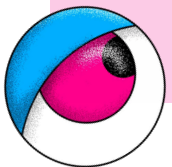
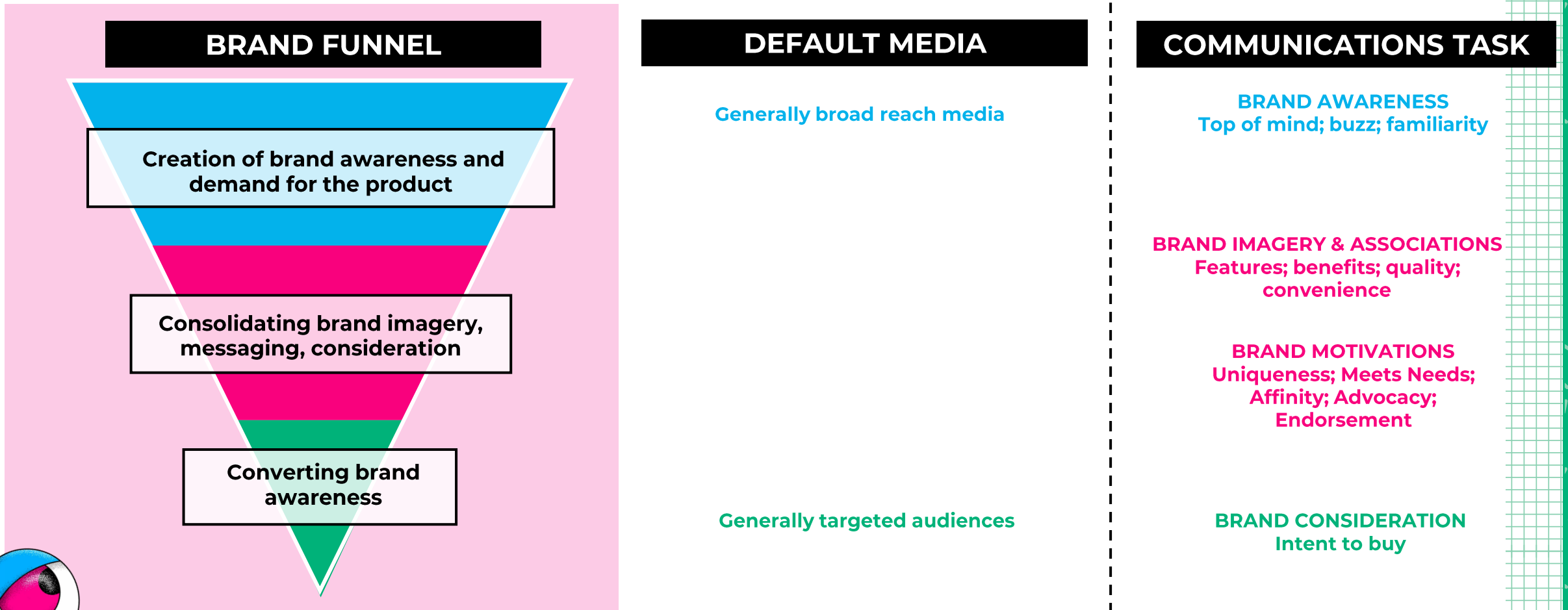
Car rentals

47 Campaigns

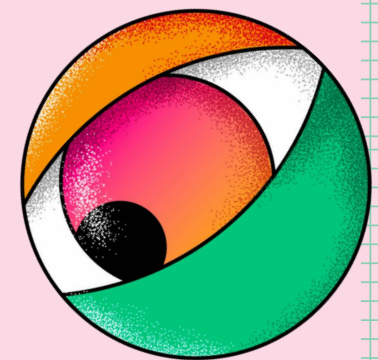
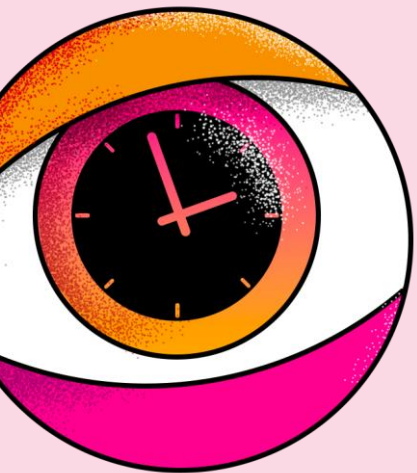
Media-driven brand impact

Regardless of the communication objective, most ad campaigns have an impact on brand.

However, the size and style of brand impact differs by task, as does the media combinations that drive the best impact.



Solus media effects and interaction effects between media



■ An introduction to solus vs interaction effects...

Solus Impact

Is the impact a channel is delivering on its own – without needing support from other media.

Interaction Impact

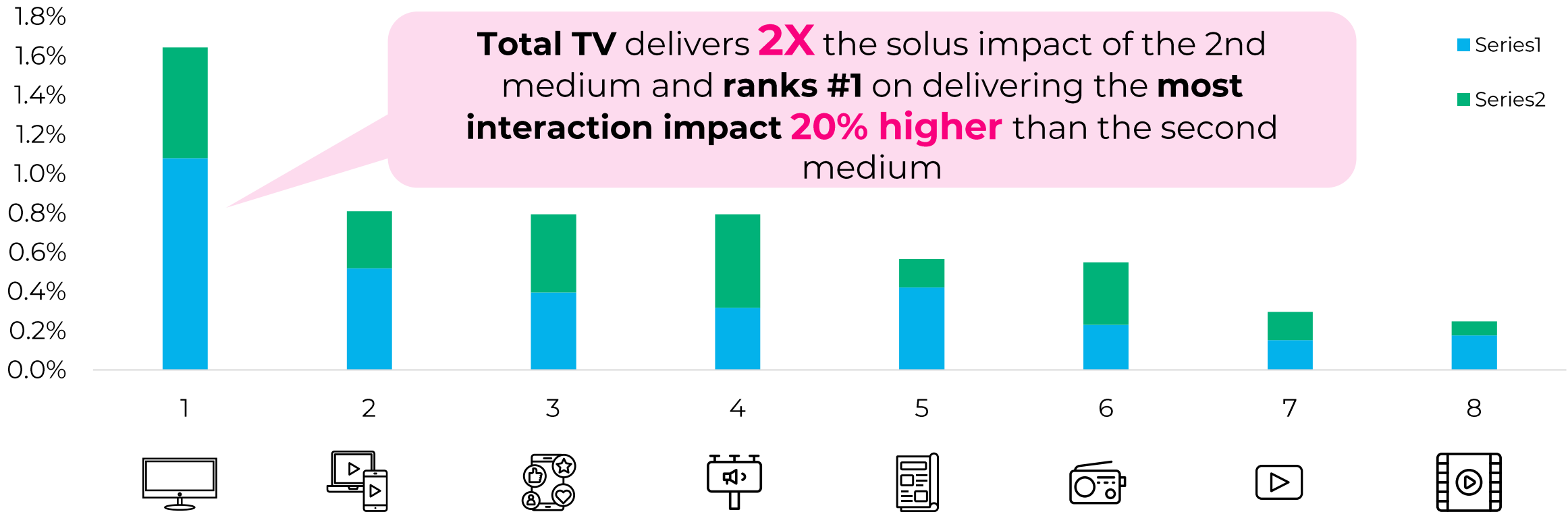
Represents the media multiplier effects. What two or more channels are doing in combination together to build impact.

Interaction accounts for ~42% of all impact and even more so for bottom of the funnel metrics and performance based campaigns.

TV delivers strong impact on its own but also sets up other media to perform

The impact each media channel has is a combination of the effect it can generate if it were to run on its own (solus effect) and the multiplier effect it has when it runs in combination with other media (interaction effect).

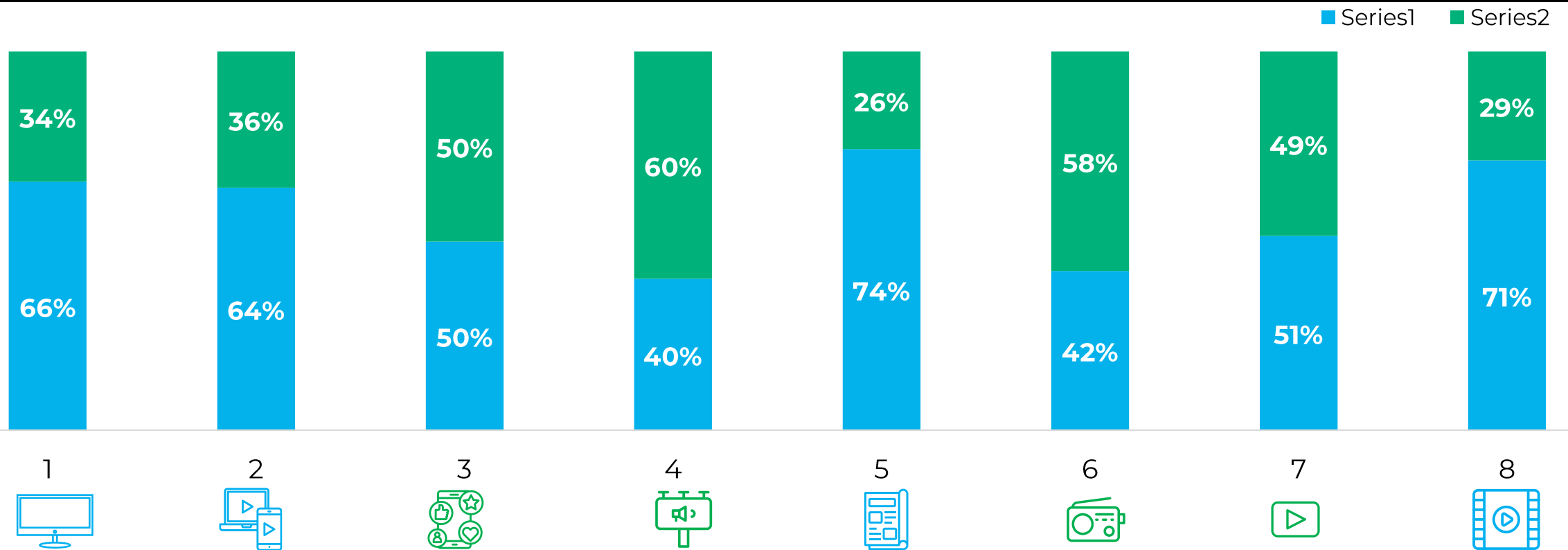
All metrics (average across KPIs) – Impact Per Channel



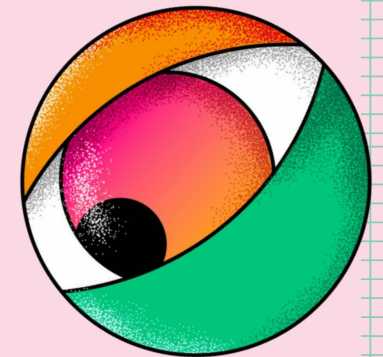
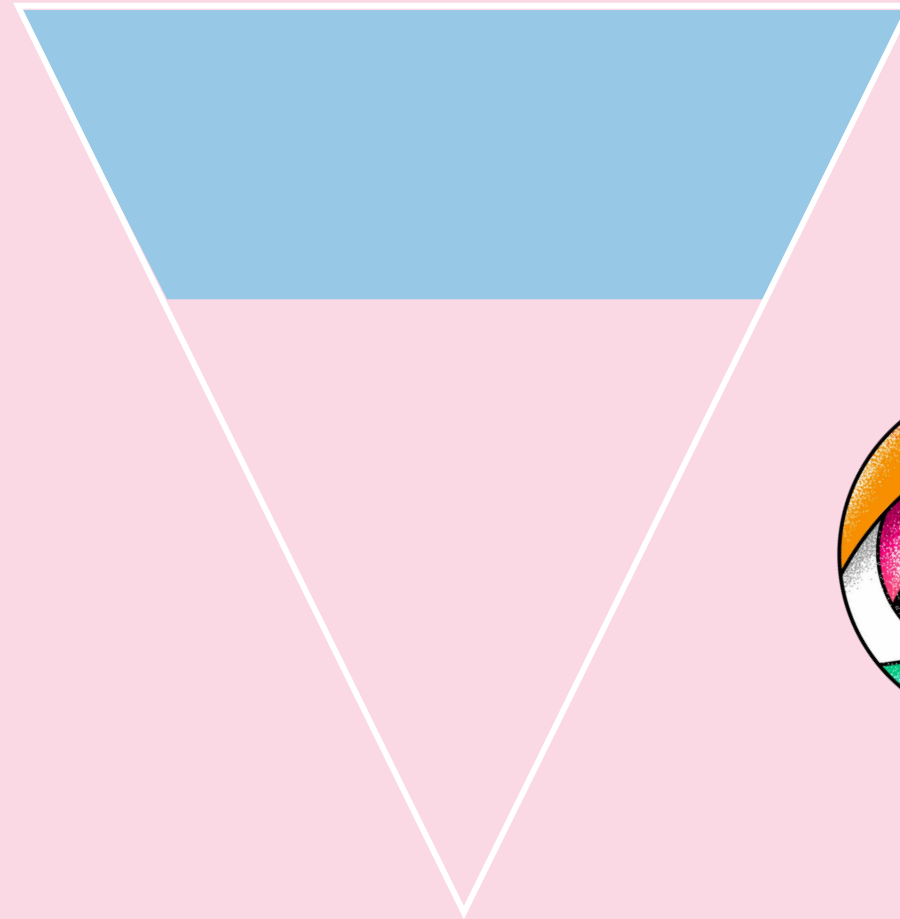
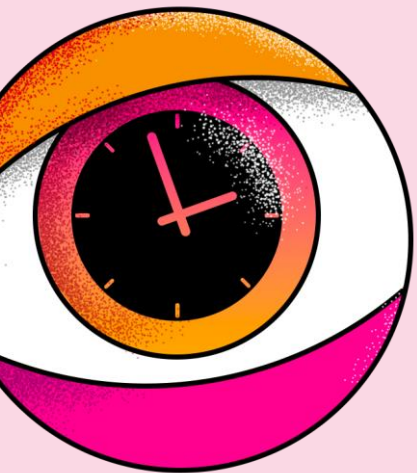
The contribution that solus vs interaction effects have can then be compared across channels to provide insight into how they best operate in driving effectiveness

Substituting high solus impact channels for these low solus impact channels may lead to weaker effectiveness outcomes

All metrics (average across KPIs) – Share of Impact from Solus vs Interaction



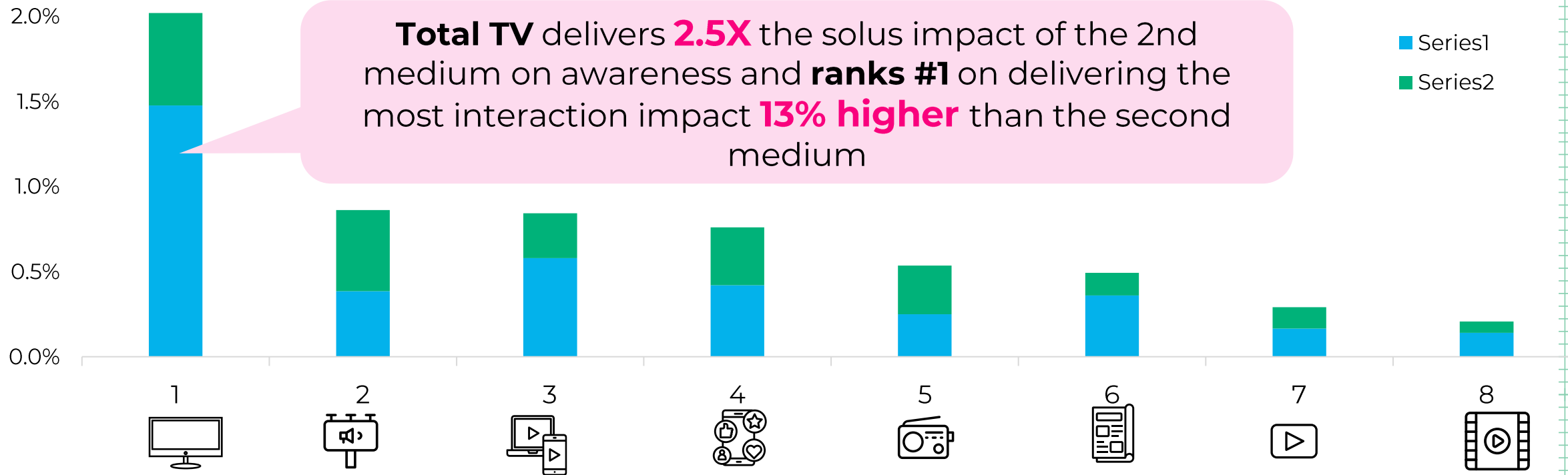
Driving top of funnel brand awareness



For brand building awareness campaigns, Total TV's impact is even greater than the next best channel, and the ratio of impact derived from solus is extreme

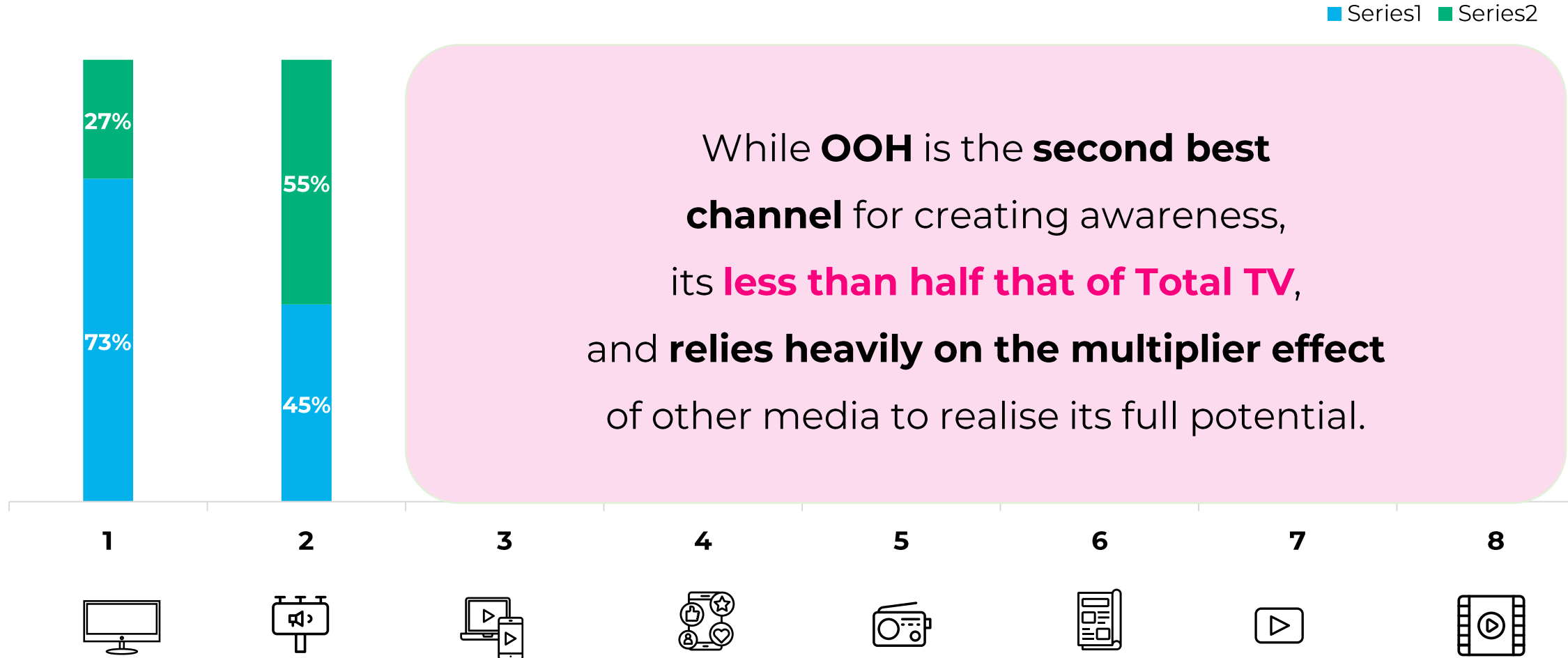
Awareness campaigns can often run on high reach media without needing as much campaign integration

Awareness – Impact Per Channel

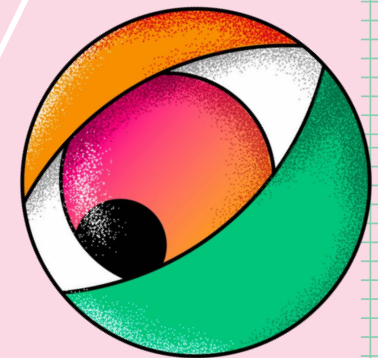
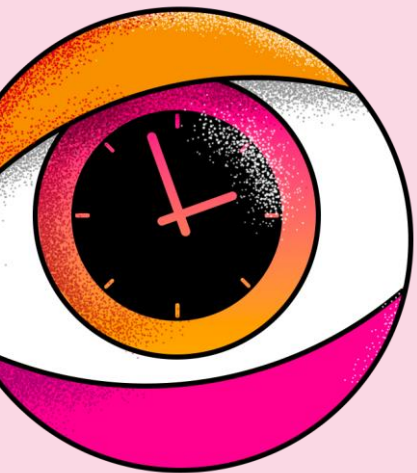


The top 2 performing channels for building brand awareness have dramatically different reliance on other media...

Awareness – Share of Impact from Solus vs Interaction

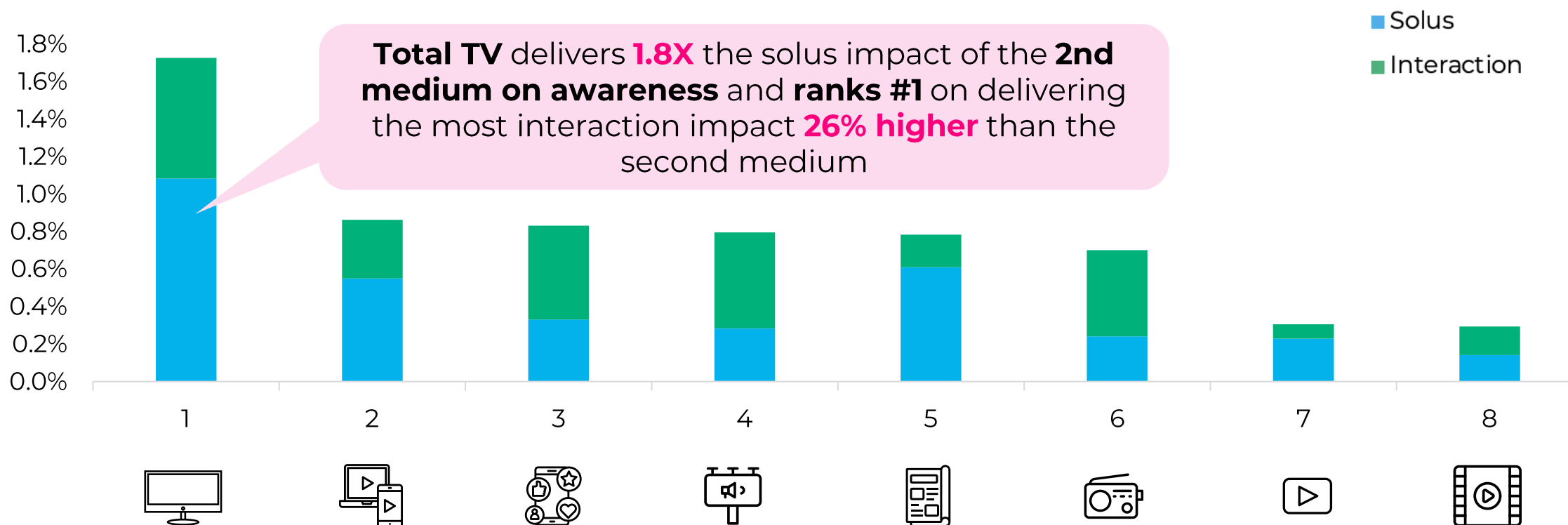


Driving bottom of funnel brand consideration



For brand conversion the best performing media differ to those that drive awareness. The one constant however, is Total TV which again generates the strongest impact

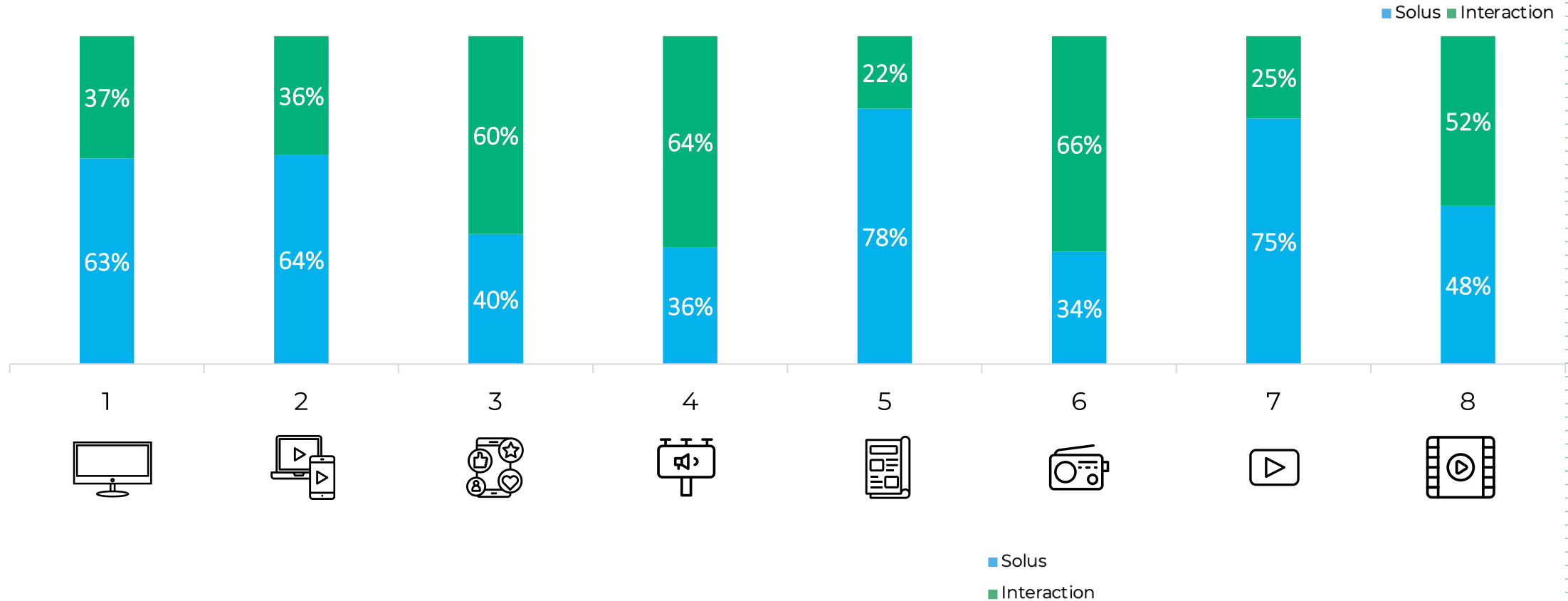
Consideration – Impact Per Channel



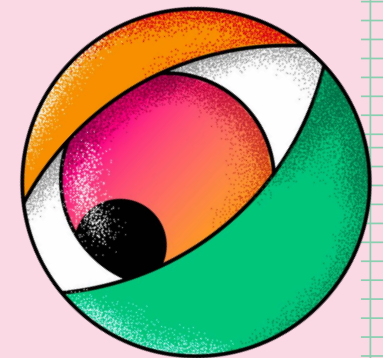
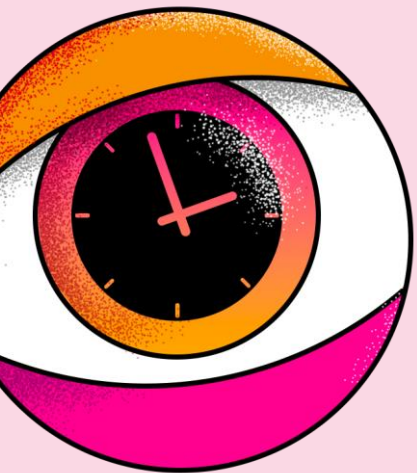
Apart from Total TV, other best performing media for brand conversion (Social, OOH, Radio) all heavily rely on other media to derive their effectiveness

Regardless of communication objective, campaigns need to ensure the channel mix is not overloaded with synergy-reliant media and balanced with high reach, standalone channels and complementary synergy touchpoints

Consideration – Share of Impact from Solus vs Interaction



What differences do we see by sector?

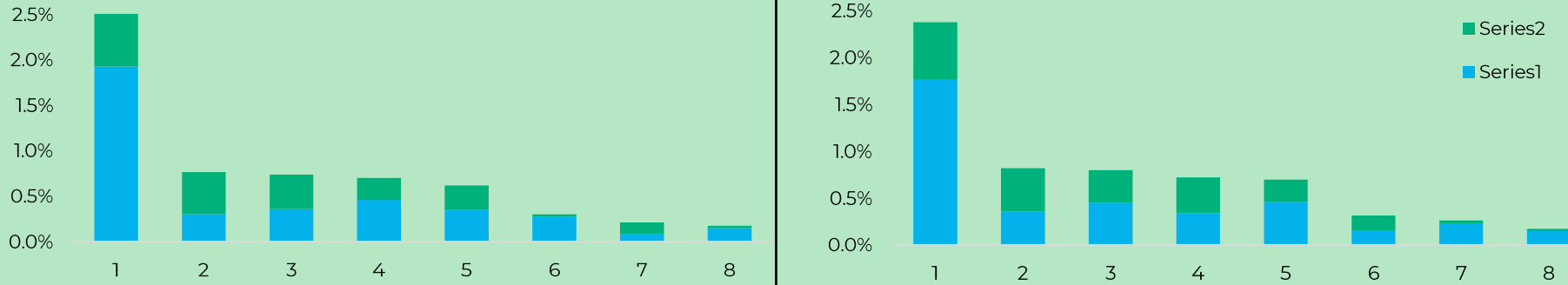


■ Sector differences – Finance and Services

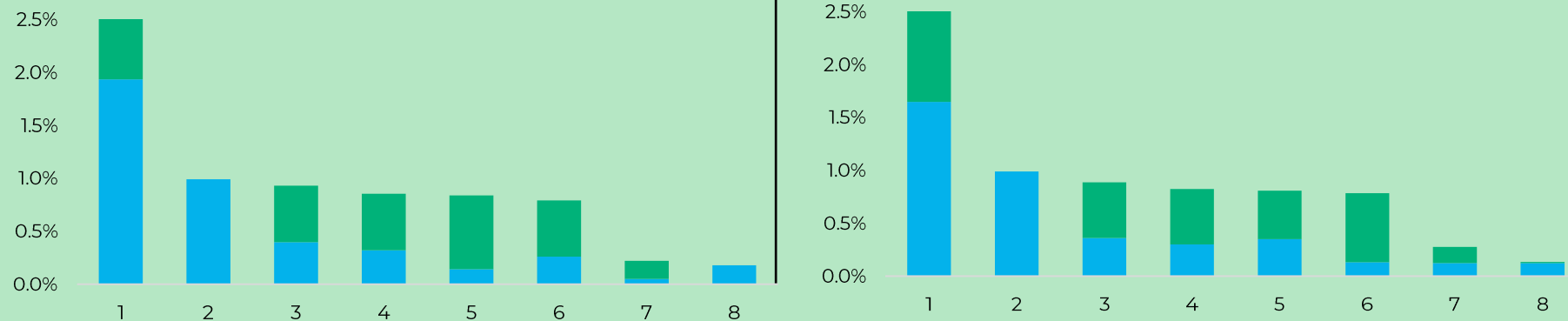
Financial Services

Services

AWARENESS



CONSIDERATION



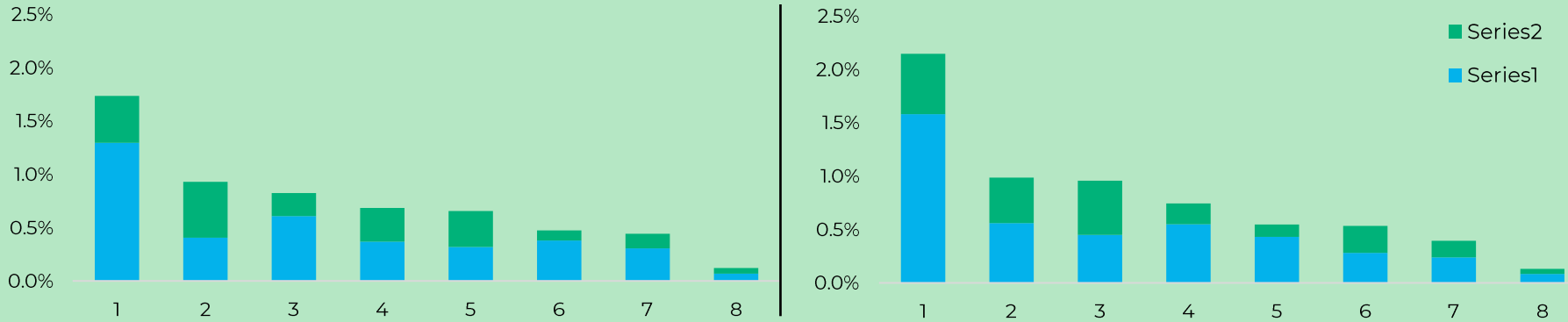
1. TV is a strong awareness and consideration driver for services ranking #1 on delivering the most impact. The ability to build stories at scale in the absence of physical product cues is an advantage of this channel
2. TV delivers a huge amount of impact on it's own but also helps to set up the effects of other media
3. Print is the next best channel for conversion, and operates with very little need for campaign interaction to derive an effect
4. OOH also features strongly but is reliant on other media to see its full potential

Sector differences – Food/Drink and CPG

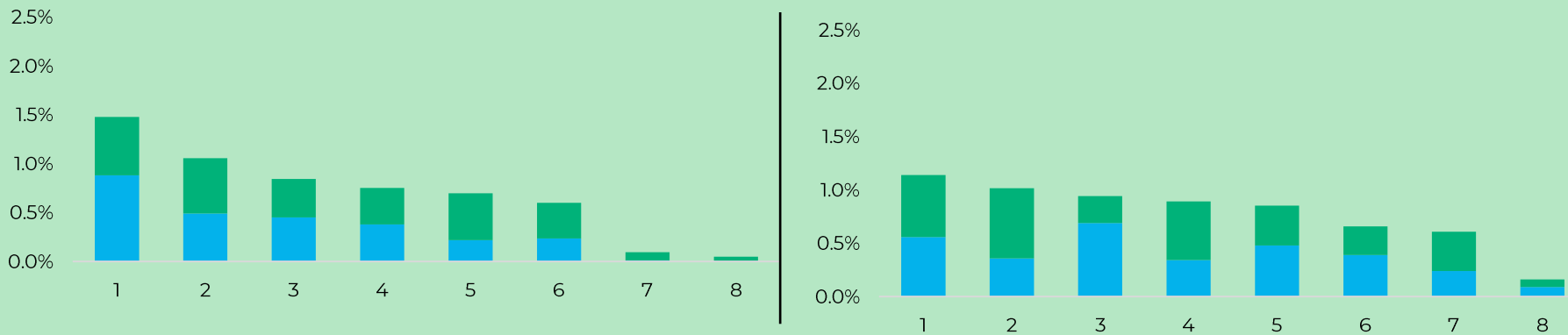
Food and Drink

Consumer Packaged Goods

AWARENESS

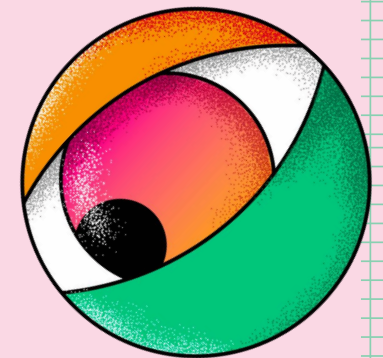
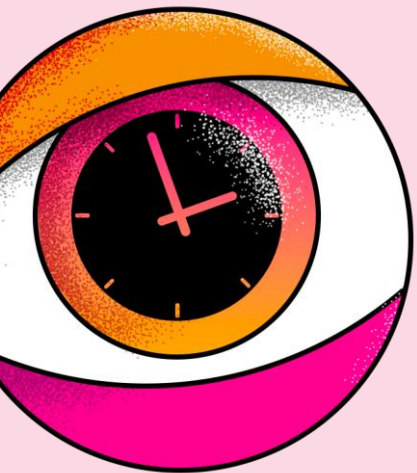


CONSIDERATION



1. TV is a strong awareness driver for F&D and CPG campaigns ranking #1 on delivering the most impact
2. TV also plays a key role in driving consideration particularly for CPG campaigns however Radio and OOH work well for F&D
3. Radio and OOH are natural mediums for impulse F&D brands and 'on the go' categories
4. Driving consideration tends to require a well executed cross-channel plan for maximum success
5. Whilst OOH features strong in the F&D space and Social for CPG large shares of their impact is coming from interaction effects

What are the best media combinations for each sector at building interaction effects?



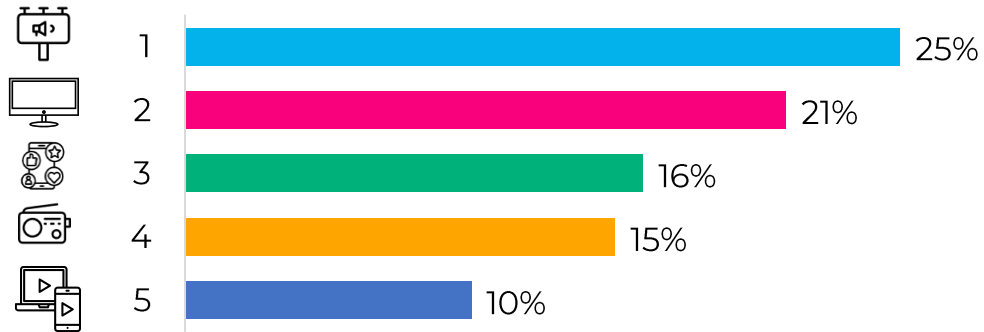
TV is a top contributor for Food and Drink media multipliers – connectedness with other media is especially crucial for TV in driving consideration

FOOD & DRINK

AWARENESS

36% of impact on awareness comes from interaction effects

Top Interaction Contributors



Top Pairings with TV

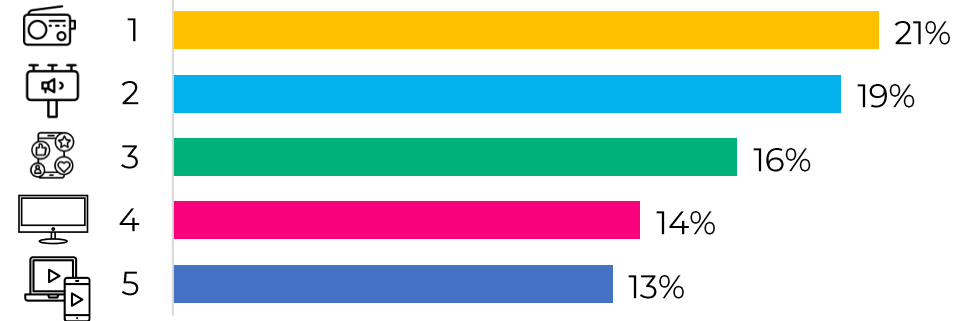


OOH, Social and YouTube can amplify Awareness alongside TV

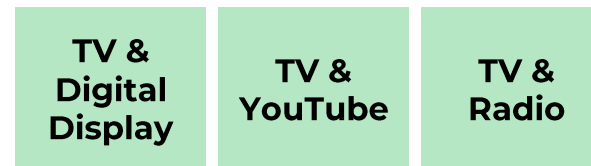
CONSIDERATION

52% of impact on consideration comes from interaction effects

Top Interaction Contributors



Top Pairings with TV



TV currently works well with Digital and Radio to build consideration but TV could potentially work harder with OOH to drive effects

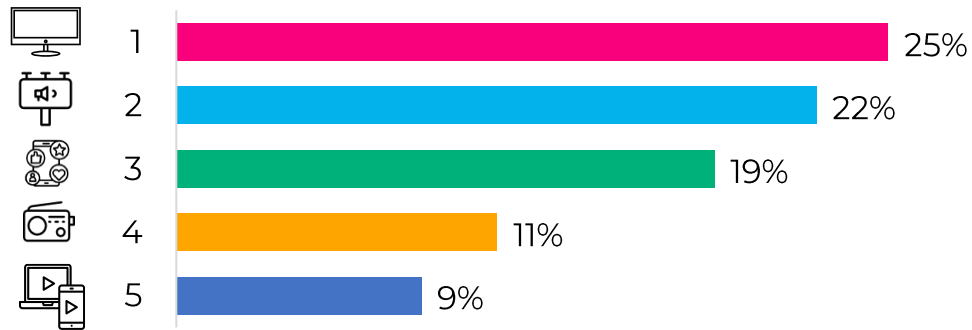
TV plays a strong role in tandem with other media to drive Awareness and Consideration in the CPG category, with OOH and Social also playing key roles

CONSUMER PACKAGED GOODS

AWARENESS

35% of impact on Awareness comes from interaction effects

Top Interaction Contributors



Top Pairings with TV

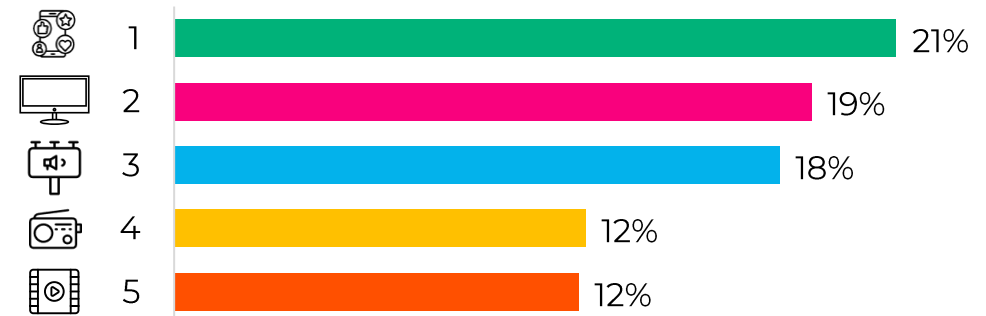


OOH, Social & YouTube act as the most prominent reinforcers of Awareness with TV

CONSIDERATION

50% of impact on Consideration comes from interaction effects

Top Interaction Contributors



Top Pairings with TV



Print and Digital channels complement TV best to drive Consideration

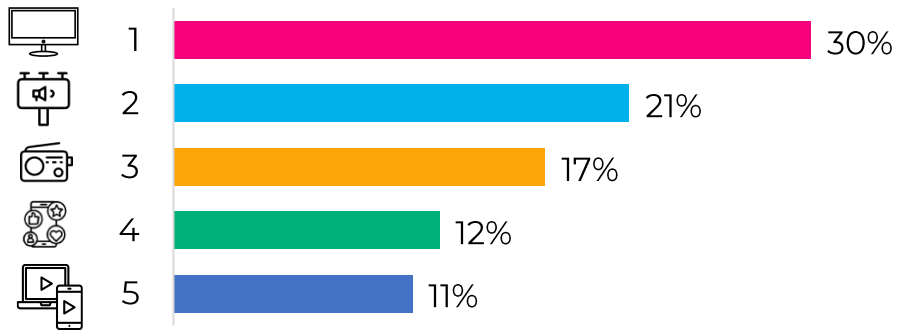
Television is the largest contributor to media interaction effects within Financial Services, followed by OOH and Radio

FINANCIAL SERVICES

AWARENESS

36% of impact on Awareness comes from interaction effects

Top Interaction Contributors



Top Pairings with TV

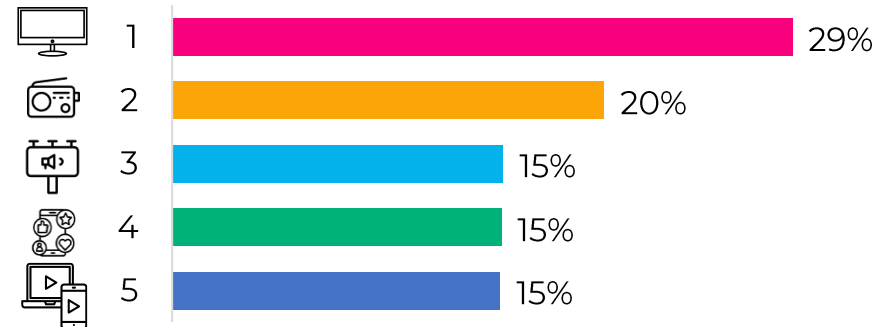


OOH, Radio and Social all work well to bounce off TV impressions in reinforcing brand awareness

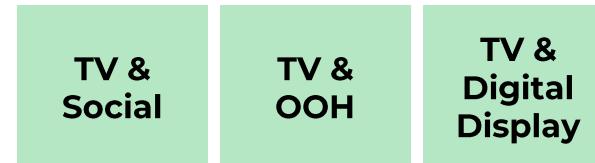
CONSIDERATION

45% of impact on Consideration comes from interaction effects

Top Interaction Contributors



Top Pairings with TV



Alongside OOH as a reminder, TV also works well with Social and Display which can add layers of messaging

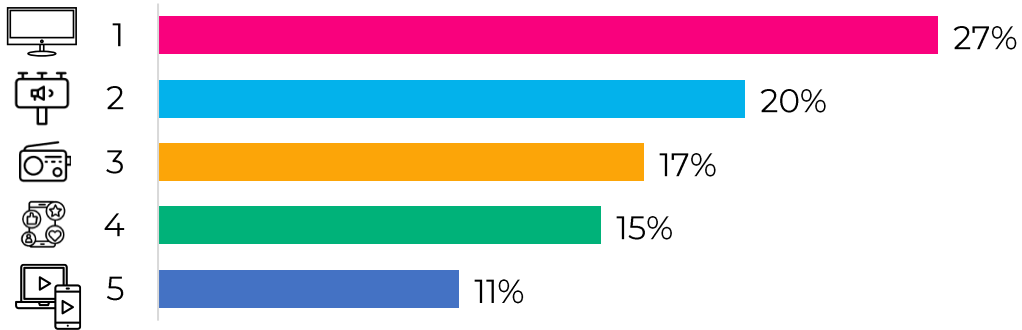
For services in general, TV again tops media interaction impacts – OOH, Radio, and Digital channels also aid multiplier effects

SERVICES

AWARENESS

37% of impact on Awareness comes from interaction effects

Top Interaction Contributors



Top Pairings with TV

TV & OOH

TV & Radio

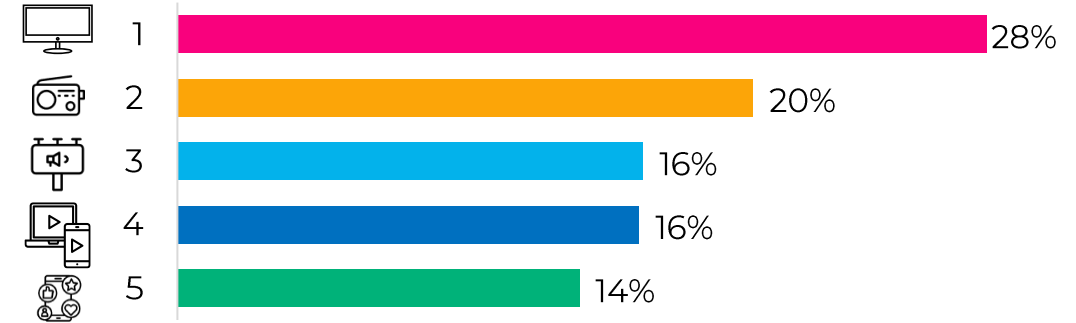
TV & YouTube

Radio can work well using audio cues to tie back to TV communication along with OOH and YT

CONSIDERATION

45% of impact on Consideration comes from interaction effects

Top Interaction Contributors



Top Pairings with TV

TV & Social

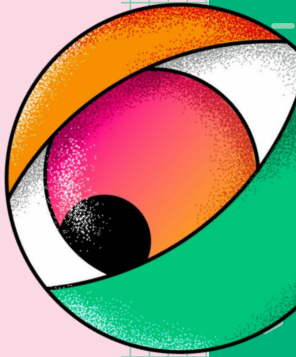
TV & OOH

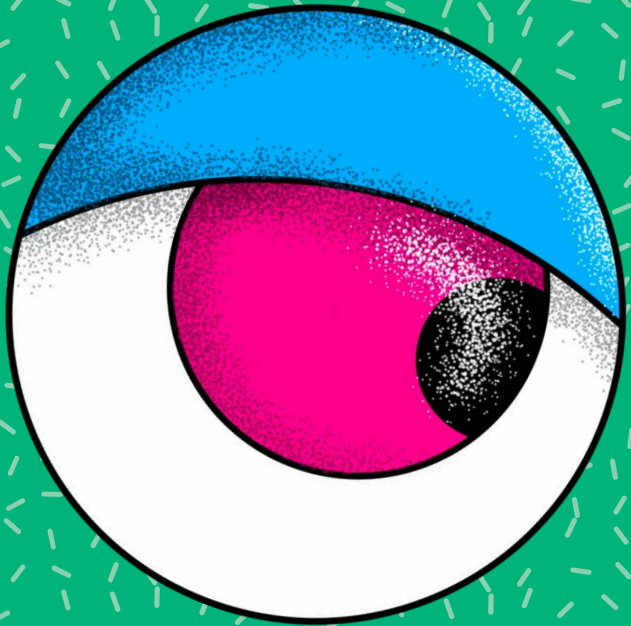
TV & Digital Display

Social, OOH and Display advertising help cement consideration in conjunction with TV

More muscle for your media

1. Total TV is a workhorse generating the greatest brand impact via both solus and interaction media effects. Total TV does a huge amount on its own but sets up other media to perform.
2. Total TV generates the largest share of solus and interaction impact for both demand generation top of funnel and demand conversion bottom of funnel campaign activities.
3. The top two media channels for building brand awareness are TV and OOH. While OOH is the second best channel for creating awareness, its less than half that of Total TV, and relies heavily on the multiplier effect of other media to realise its full potential.
4. Apart from Total TV, the other best performing media for brand conversion (Social, OOH and Radio) all heavily rely on other media to derive effectiveness. Campaigns need to ensure the channel mix is not overloaded with synergy-reliant media.
5. TV's strong impact is echoed across all product categories. TV dominates the top interaction impacts from building demand and awareness to driving conversion in Services categories .
6. TV plays a strong role in driving awareness for F&D and CPG but we also see Radio and OOH working hard on Consideration for more impulse brands and 'on the go' products. Interaction effects are even more important for this category with half of all impact on consideration coming from media multiplier impacts. Connectedness with other media is especially crucial for TV in driving consideration.





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With thanks | KANTAR