



INSIGHTS ON MAXIMIZING ADVERTISING ROI



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BrandScience, a marketing and business effectiveness consultancy, analyzed more than 400 econometric studies to determine the impact of various media on sales - individually, in a media mix and over time. Several categories were examined including consumer packaged goods, retail and finance categories. The research revealed many interesting relationships.

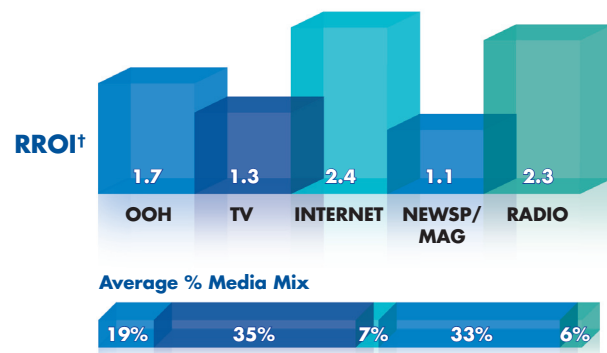
Key Findings

Out-of-Home generates higher RROI – above the average of all media analyzed

- Within the categories studied OOH consistently performed within the top 3 of all media tracked.
- Despite a lower share of the average media budget, in most categories, OOH delivered higher RROI than the other media analyzed.
- When the share of spend on OOH was increased, the performance of the other media in the mix was also improved.
- OOH's RROI is trending up over time, whereas other major media are at best, flat.

PRODUCT CATEGORY RESULTS

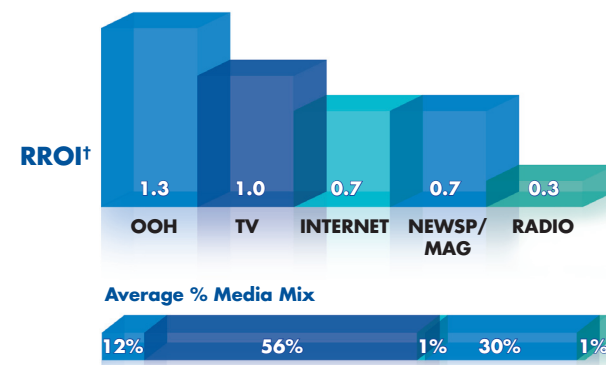
All Goods*



OOH delivers 31% higher RROI than TV using half of the level of investment.

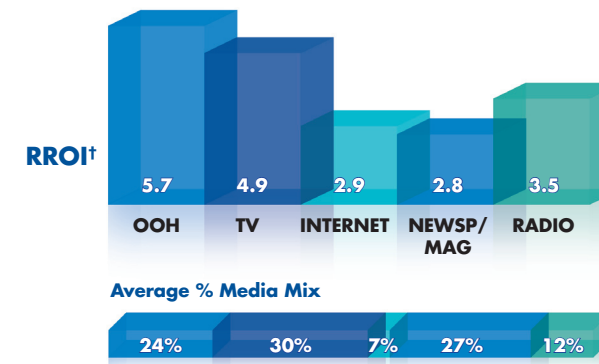
* Includes all product categories excludes services.

Health & Beauty



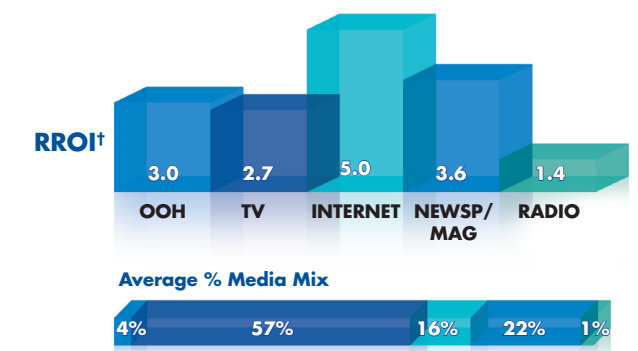
Out-of-Home is the most efficient medium for Health & Beauty advertisers, delivering \$1.3 RROI for each media dollar spent.

Travel



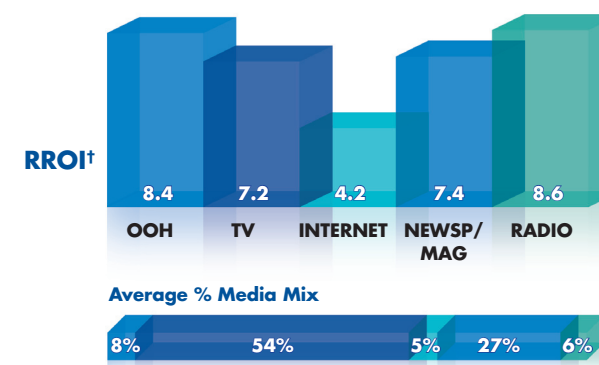
OOH is the most efficient medium for Travel brands, generating the highest RROI of all media.

Financial Services



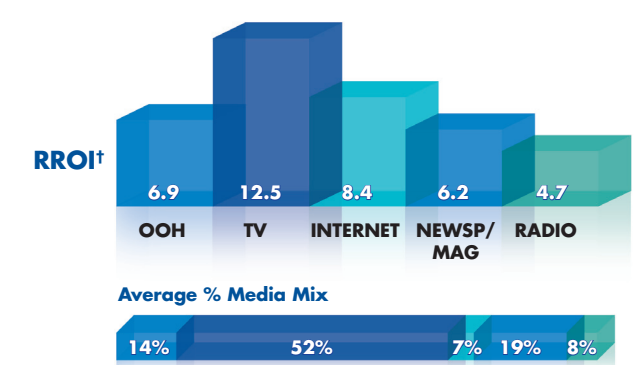
Within the Financial Services sector, OOH delivers higher RROI than TV but with only 7% of the budget allocated to TV.

Telecommunications



OOH is the best performer after radio, and generates 17% higher RROI with only 15% of the budget allocated to TV.

Leisure*

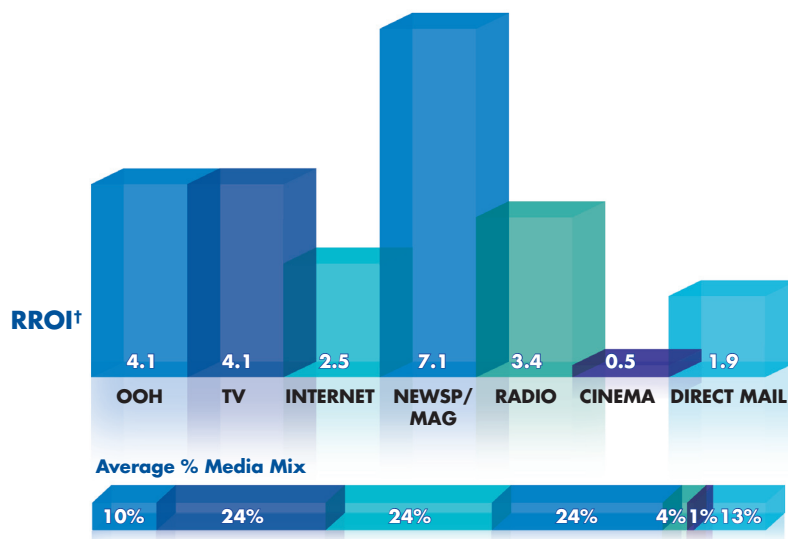


OOH delivers half the RROI of TV using one quarter of TV's budget.

* Includes DVD/video/CD/gambling/restaurants and theme parks.

† RROI: revenue return on investment or incremental sales revenue for each dollar of media cost.

Retail



In the Retail Services sector, OOH delivers the same RROI as TV, with 40% of its investment level.

SUMMARY

1. The research reinforces the effectiveness of using multiple media to create connect points that engage consumers at relevant times throughout the day and on the path to purchase.
2. Out-of-Home's revenue return on investment is increasing over time whereas other media are at best flat. This is due in part to the audience erosion that has occurred in other media as well as the high level of disengagement from media such as TV and online. Technology has had a positive impact on Out-of-Home leading to the growth of digital networks, mobile and other interactive opportunities that engage active consumers who spend over half their time outside of the home.
3. Despite lower advertising budgets, Out-of-Home advertising is shown to perform better than other media and in a media mix, improves the performance of the other media.

† RROI: revenue return on investment or incremental sales revenue for each dollar of media cost.

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