

IMI

PROMOTRACK™ ANZ 2025

BE THE EXPERT IN THE ROOM

consultimi.com.au/promotrack



Every couple of years we speak to a ton of Aussies (802) and Kiwis (505) covering all walks of life. We ask them about current events, the economy, trends, preferences, and their ever-changing shopping behaviours.

Building PromoTrack is a massive undertaking that takes us over 2 months. We combine survey data, case studies, choice-based store shelf experiments, concept testing, and mine our enormous database of over 34,000 programs. We also lean on our agency and brand partners for input to make sure we answering the questions of the day.

A MASSIVE THANK YOU TO EVERYONE INVOLVED.

PROMOTRACK™ EXISTS...

...SO YOU CAN BE THE EXPERT IN THE ROOM
WITH DATA TO BACK IT UP

...SO BRANDS MAKE MORE MONEY BY STEALING
SHARE, IMPROVING ROI, AND DELIGHTING THE
SHOPPER

...TO OPTIMISE BUDGETS AND SIGNIFICANTLY
IMPROVE THE POTENTIAL FOR SUCCESS



CONTENTS

PROMOTRACK™

BE THE EXPERT IN THE ROOM

9 | WHAT DOES A GREAT PROMO
LOOK LIKE?

20 | PROMO 101

35 | PROMOTIONS AND THE COST
OF LIVING

45 | MYTH BUSTING BY THE
NUMBERS

54 | PRIZING

78 | MECHANICS & RETAIL
REQUIREMENTS

89 | SOCIAL, DIGITAL & GAMIFIED

92 | COMMS BEST PRACTICE



RESEARCHED PROMOTIONS ARE 57% MORE LIKELY TO DELIVER A POSITIVE ROI VS. PROMOTIONS THAT RELY ON GUT-FEEL*

Test 6 concepts | N=300 | 5 Days | \$8,940

*IMI's database of tracked promotions:
Unresearched: 49% have a +ROI
Researched: 77% have a +ROI

- ◆ IMI IS UNAPOLOGETIC ABOUT WANTING TO DO THINGS BETTER. AS A BUSINESS WE HAVE DEVOTED 54 YEARS TO PRODDING AND DISSECTING OVER 34,000 PROGRAMS TO SEE WHY THEY WORK, AND WHY THEY SOMETIMES FAIL SPECTACULARLY.
- ◆ IT IS AN UNDENIABLE FACT THAT TESTING YOUR IDEA IS THE #1 DIFFERENTIATOR BETWEEN A POSITIVE VS. NEGATIVE ROI.

INSIGHTS AROUND PROMOTIONS IS ONLY A SMALL PART OF WHAT WE DO, BUT HERE'S HOW WE CAN HELP

BEST PRACTICE PromoTrack™ Workshop

- 2 hours
- Promo Best Practice and how that relates to your category/clients
- Case studies and current data
- 52 years of data-led knowledge transferred to you

\$1,950 + TRAVEL

RESEARCH Flagpole™ for Promos

- Tailored to your brand and category
- Test up to 6 concepts
- 5-day turnaround
- Clear Go/No Go recommendations
- Incremental volume potential
- Full diagnostics
- Benchmarked
- N=300 category non-rejecters

\$8,940

CONSULTING PromoMap™

- Send us your concepts
- Data and experience-led consulting
- 24-48-hour turnaround
- 5-10-page report

**\$925 PER
CONCEPT**



PROMOTRACK™

BE THE EXPERT IN THE ROOM

HOW DO IMI TEST PROMOTIONS?

As a progressive agency we have evolved concept testing to meet the needs of clients within the reality of modern-day marketing. Initially developed for the beverage, confectionary, FMCG, and fast-food categories, **Flagpole™** started as our mission to build the ultimate concept test (better, faster, cheaper) for **promotions, NPD, comms/creative, packaging, and price.**

Perfect for early-stage ideation to **eliminate ideas that have no chance of success** and **prioritise / optimise / progress ideas that do.**
Action Standards for your category, your markets, your brands, your targets.

Better – standardised but flexible: define your audience & segments, key questions, analysis & reporting. Suitable for testing new Products, Promotions, Packaging, and Positioning.

Smarter - Uses technology and experience to address common problems in concept testing and deliver more clarity than traditional methods can provide.

Faster – Report delivered 5 business days after the receipt of final concepts (includes translation where required)

Incredibly affordable - 75% less cost than traditional quantitative research. Without compromise.



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THE LAST FEW YEARS: ADVANCED MODELLING, CREATIVE EFFECTIVENESS, PROMOS, TRACKING, TVC/SCRIPT TESTING, CONCEPT/NPD, CONSULTING



FISHER & PAYKEL



DIAGEO



*Kimberly-Clark



coles



Asahi



Coca-Cola



Cadbury



MARS



WHAT DOES GREAT LOOK LIKE?

Salt on the rim of a margarita?

Yep 42%

Nope 28%

Margaritas? Gross. 31%



IMI SUBSCRIBE TO THE EHRENBERG BASS THEORY OF 'HOW BRANDS GROW'

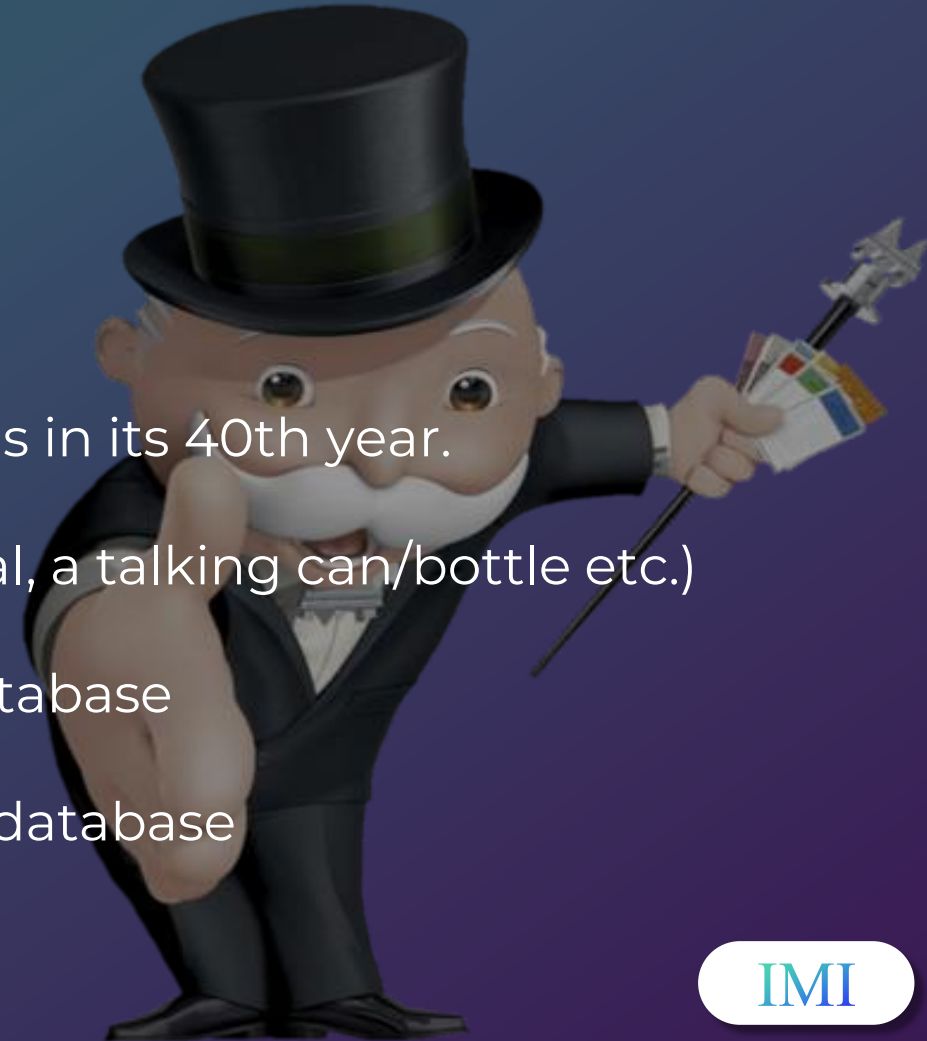
IN ALMOST EVERY CATEGORY, >50% OF THE VOLUME UPLIFT
DURING A PROMOTIONAL CAMPAIGN WILL BE DRIVEN BY
PEOPLE WHO RARELY, OR NEVER SHOP THE BRAND.

PLAN ACCORDINGLY.

WHAT DOES “GREAT” LOOK LIKE?

IMI's database of over 34,000 concepts

- The Top 11,000 have a purchase requirement of ONE
- The Top 7,000 have a frequency prize
- The Top 1,900 are instant wins
- The Top 10 are being run for the 10th or more time. #1 is in its 40th year.
- The Top 9 all have a physical mechanic (peel and reveal, a talking can/bottle etc.)
- The best 'Game of Skill' is in the bottom 0.5% of the database
- The best 'Upload and Tag' is in the bottom 0.1% of the database



THE BEST OF THE BEST...

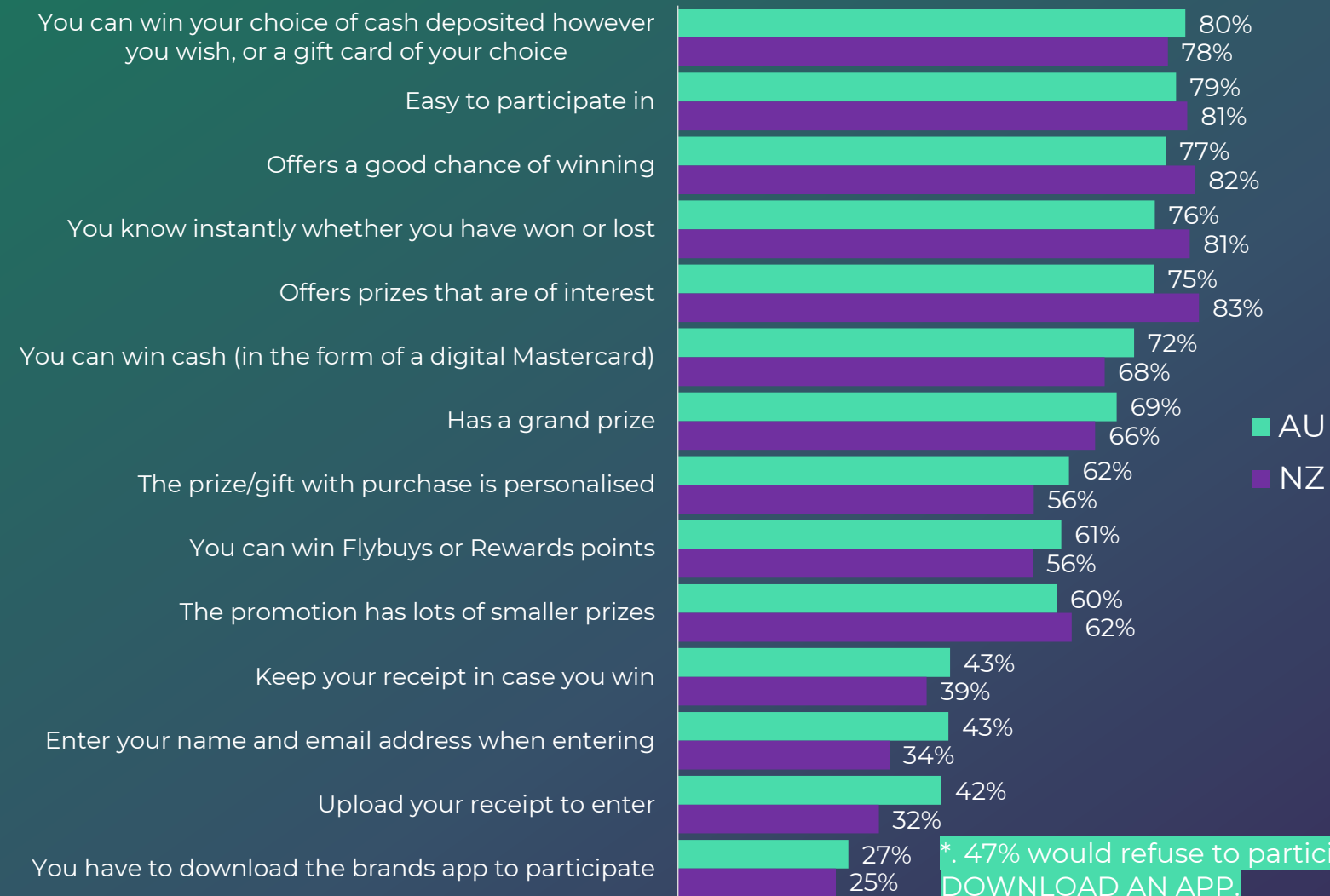
1. ...change behaviour of shoppers that do not usually purchase the brand (light category, and competitor brand users).
2. ...are on-pack. This is the primary source of awareness and comprehension for FMCG and alcohol category promotions. Being on, or a close to pack as possible, is critical.
3. ...are simple. Simple promotions get more traction because they are easily comprehended. And without comprehension there is no participation.
4. ...have a frequency prize layer. Promotions with a frequency layer are 8 times more likely to deliver a positive ROI. It is this frequency layer that is responsible for driving perceived chance of winning – a critical lever among light and non-users - and repeat participation.
5. ...are instant win. Instant win + low purchase requirement + easy entry mechanic is best in class.
6. ...if account specific, are risk-managed (insured). Risk-managed promotions help stretch budgets and achieve a 'big' headline. Done properly, shoppers find risk-manager promotions highly motivating.

CATEGORIES MOST SUSCEPTIBLE TO SWITCHING

% DEFINITELY / PROBABLY WOULD CHANGE BRAND FOR A PROMO	TOTAL	Gen Z (16-28)	Millennial (29-44)	Gen X (45-60)	Boomer (61-79)	Male	Female
N=	802	201	265	241	96	401	401
Savoury Snacks	56%	55%	55%	60%	53%	54%	59%
Chocolate Bars and Blocks	56%	56%	57%	56%	52%	52%	59%
Household cleaning products	53%	57%	54%	54%	46%	50%	57%
Cheese	51%	49%	51%	51%	53%	49%	53%
Frozen Veggies	50%	47%	54%	51%	47%	45%	56%
Laundry Detergent	50%	51%	50%	51%	46%	47%	54%
Yogurt	49%	54%	49%	47%	44%	47%	51%
Cereal	48%	52%	52%	41%	49%	45%	51%
Soft Drinks	48%	54%	51%	45%	35%	46%	50%
Spirits and Pre Mix Cans (18+ Only)	36%	44%	39%	33%	22%	36%	36%
Beer (18+ Only)	33%	36%	36%	31%	25%	37%	29%
Pet Food	30%	32%	37%	27%	14%	30%	30%

Alcohol and Pet Food are the toughest categories to entice people to switch. We know that promotions can and do work in these, so it is a case of being more pragmatic around building optimal promotions that can pique interest of switchers.

ENCOURAGING FEATURES OF A PROMOTION



*. 47% would refuse to participate IF THEY HAD TO DOWNLOAD AN APP.

The drivers of participation follow 3 main themes:

1. Relevant and compelling prizes
2. A fair chance of winning (facilitated by having lots of prizes)
3. No making it unreasonably difficult to enter (straight forward mechanic)

THE RISK OF NOT TESTING YOUR IDEAS – RED BULL NEVER STOOD A CHANCE



85%

Correct
Purchase
Requirement*

81%

69%

Correct Prize
(Any)*

80%

52%

Correct
Mechanic*

77%

11%

Interested in
this prize

92%



Both promotions did a fantastic job of communicating the 3 core drivers:

1. What can I win?
2. How do I win/enter?
3. What do I have to buy?

BUT! Prize appeal is nothing short of disastrous for the Red Bull promotion – something that would have been picked up in concept testing.

*The above represents the "4s Comprehension Test": Unaided, how much does a shopper understand after a 4s exposure?

WHO'S THINKING WHAT?

The Boardroom 's Thinking...		Best Customer's Thinking Only responsible for around 35% of the volume increase specifically attributed to a promotion*	Competitor Customer's Thinking Responsible for around 65%+ of the volume increase specifically attributed to a promotion*	Consider...
1. We need a massive prize that grabs attention		"Wow... that's a great prize. I buy a lot of brand X... I <i>have a fair chance of winning it!</i> "	"Wow... that's a great prize and you have my attention. But I don't a lot of brand X... <i>I probably wouldn't win it! So what other prizes are there?</i> "	Grand prizes are great for cut-through and can drive already-good customers, but they work best when there are 3-5
2. We need lots of smaller prizes to make it feel like a celebration		"Amazing – I feel like <i>I'm almost a certainty to win!</i> "	"Amazing – I feel like <i>I have a great chance of winning!</i> "	Frequency prize drives everyone but are critical for driving incremental shoppers (as they are more attainable). Size and number is important. They also drive repeat. Usually the primary driver.
3. Which mechanic should we use?	Game of Skill	" <i>Too hard, and I don't have the skill to win</i> "	" <i>Too hard, and I don't have the skill to win</i> "	Easy always wins. Never use 'In 25 words', upload a pic, or 'leave a review'. Make it as simple, and as close to the point of purchase as possible. Strong correlation between distance from purchase to unlikely to enter.
	Enter Online – Instant	"I have the brand-involvement to work a little harder and I'll <i>keep on trying until I win</i> "	" <i>I love that I find out straight away. I might even try again if I don't win</i> "	
	Prize Drawer	"I'll give it a go... <i>not as fun/engaging as finding out straight away but I might enter twice</i> "	"I'll give it a go and wait and see if I've won – I'll probably enter once"	
	Instant – In pack/moment	"This is fun – I look forward to ripping open the pack to see if I've won... I'll <i>try as many times as I can</i> "	"This is fun – I'll <i>probably switch away from my usual brand a few times to see if I've won</i> "	
4. What should the Purchase Requirement look like?		I don't mind having to buy more than 1 because I know I'll use/eat it eventually	I don't love this brand, but if I only have to buy one it's not much of a risk	In most categories, asking for a purchase of 2 items more than halves participation . Keep it as low as possible.
5. How should we communicate the offer?		<i>I'm more tuned-in to the brand so I'm likely to learn about the promotion</i>	The only time I'll ever see the promo is at-shelf, so it'd better be on pack, unmissable, and simple... otherwise I'm grabbing my usual	For over 60% of shoppers, the first time they will see a promotion is at-shelf. MUST be on pack. MUST be clear.

AUS TOP 15 PRIZE THEMES BY AGE AND GENDER

	Total (Aus)	Gen Z	Millennial	Gen X	Boomer	Male	Female
Prize Money	75%	75%	83%	69%	69%	75%	74%
Travel	61%	71%	59%	59%	52%	64%	59%
Music / Concerts	48%	74%	49%	31%	21%	46%	50%
Movies / Arts / Entertainment	47%	66%	42%	43%	23%	44%	50%
The Beach	47%	58%	55%	39%	19%	47%	47%
Home Entertainment	46%	46%	60%	40%	28%	44%	48%
Cooking	43%	60%	45%	38%	19%	36%	50%
Cars / Motor Vehicles	41%	40%	46%	35%	41%	50%	29%
Health & Fitness	37%	42%	44%	36%	12%	38%	35%
Fashion, Health & Beauty	37%	49%	43%	25%	17%	29%	45%
Camping / Outdoors	34%	55%	29%	29%	11%	36%	31%
Gardening	33%	35%	30%	37%	28%	35%	31%
Computing / Gaming	33%	48%	34%	29%	10%	35%	30%
Olympic Games	31%	34%	32%	32%	20%	38%	24%
A charity	30%	42%	26%	29%	19%	30%	30%

Significantly **Over** / **Under**
Index Relative to Total Sample (95% Confidence Interval)

Aus N=802

For a product that you need or want, how likely would you be to purchase a brand that you do not normally buy or buy infrequently if it offered you the chance to win the following themed prize? VERY/SOMEWHAT LIKELY

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NZ TOP 15 PRIZE THEMES BY AGE AND GENDER

	Total (NZ)	Gen Z	Millennial	Gen X	Boomer	Male	Female
Prize Money	71%	66%	70%	79%	66%	68%	75%
Travel	54%	62%	55%	48%	47%	52%	56%
Home Entertainment	43%	58%	52%	30%	18%	46%	41%
Cars / Motor Vehicles	42%	53%	54%	32%	23%	47%	37%
Cooking	40%	43%	46%	32%	33%	31%	46%
Movies / Arts / Entertainment	39%	64%	35%	34%	17%	30%	48%
Music / Concerts	36%	54%	34%	37%	9%	33%	39%
The Beach	35%	49%	42%	22%	22%	32%	38%
Health & Fitness	34%	38%	38%	27%	31%	30%	38%
Computing / Gaming	33%	52%	38%	23%	5%	40%	27%
A charity	32%	46%	35%	27%	15%	28%	35%
Camping / Outdoors	30%	30%	37%	32%	12%	31%	29%
Gardening	29%	31%	33%	32%	11%	31%	28%
Kids Education	28%	39%	36%	27%	4%	36%	21%
Fashion, Health & Beauty	27%	50%	29%	20%	11%	15%	42%

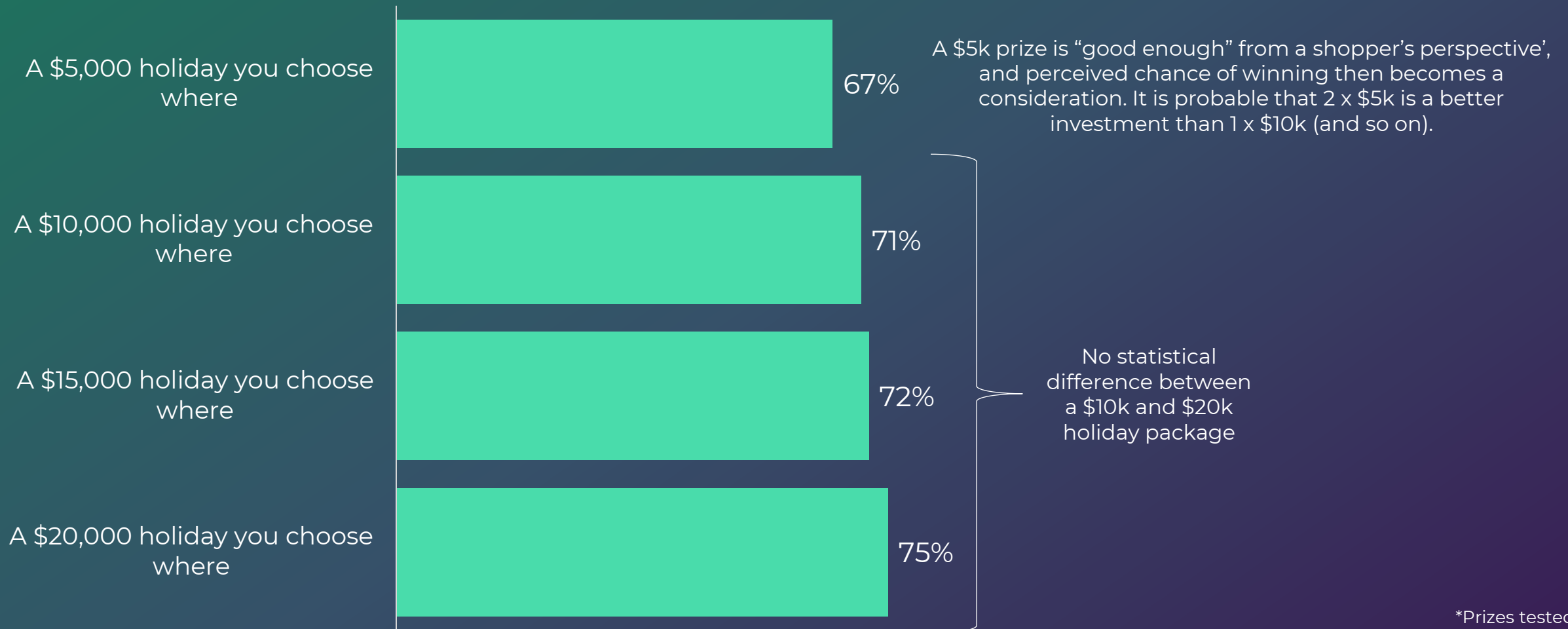
Significantly Over / Under
Index Relative to Total Sample (95% Confidence Interval)

NZ N=505

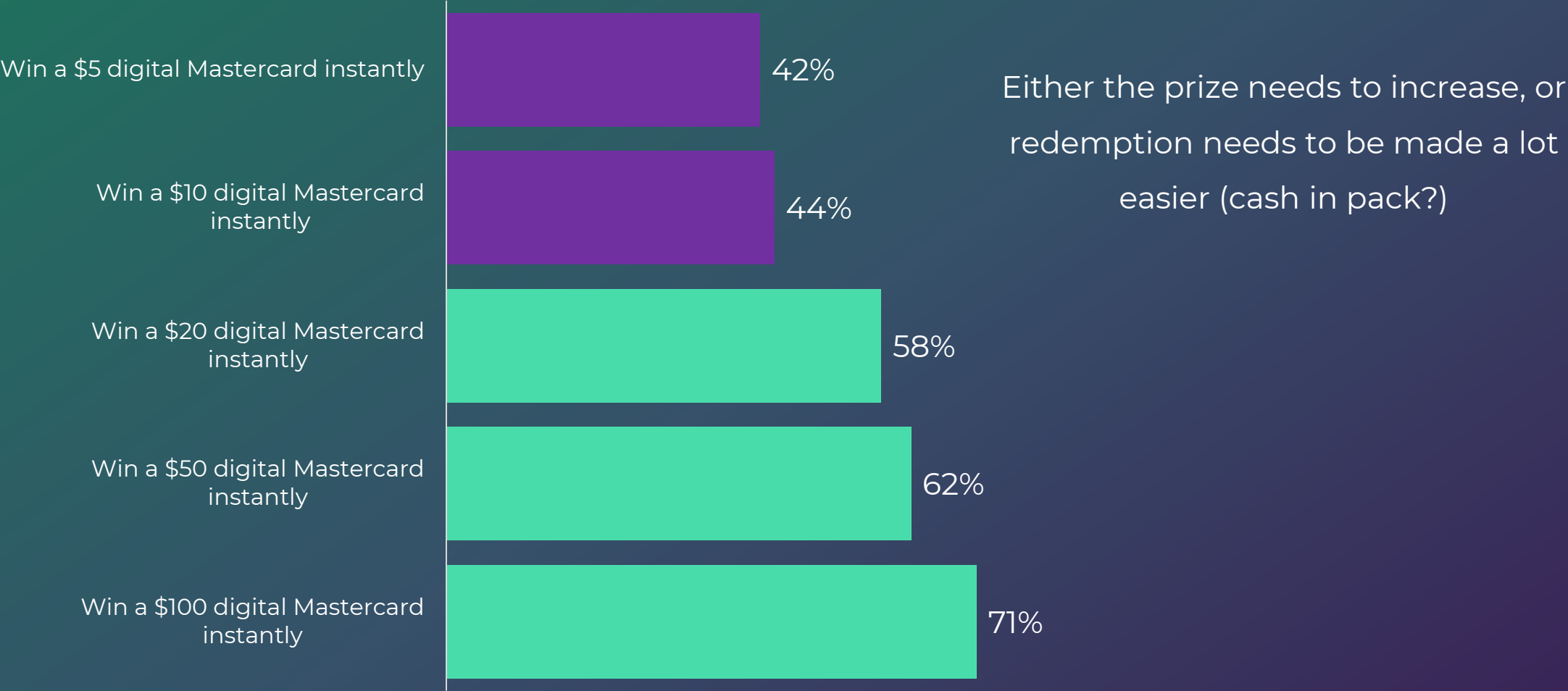
For a product that you need or want, how likely would you be to purchase a brand that you do not normally buy or buy infrequently if it offered you the chance to win the following themed prize? VERY/SOMEWHAT LIKELY

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OPTIMAL SPEND ON GRAND PRIZING



THE PRIZE IS ONLY A PRIZE IF IT'S WORTH REDEEMING



If you were to win a \$[X] digital Mastercard instantly, how likely would you be to redeem the \$[X] prize? % WOULD DEFINITELY REDEEM

*Prizes tested monadically to avoid comparison / context biases

GAMIFICATION

- ❖ Avoid asking for an App download – use a web-based platform
- ❖ Mechanics involving gamification are typically lower reaching than a traditional mechanic (scan -> enter -> win) and will skew more towards loyal / current purchasers. They also skew toward heavier current customers
- ❖ Gamification needs to be fast, easy and fun (a driver)
- ❖ Gamification should never require effort, skill, or a public leaderboard. Reward / winning should not be linked to having to be good at the game
- ❖ The mechanic should be a twist on something familiar (spin to win, scratch and reveal etc.)





**For a free copy of the full report email
devon@consultimi.com**