



Ditching Digital Skip Bins:

Local Area Marketing
Playbook

February 2025

tfm.digital

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Introduction

The tools we have at our disposal should make Local Area Marketing (LAM) easier than ever; but in an increasingly fragmented digital landscape, with dwindling attention from consumers, effective and concentrated local area marketing often remains in the too hard basket.

While it's not sexy enough to dominate headlines, the misplaced conception of difficulty has resulted in many defaulting to Google and Meta for their templated options. LAM has been relegated as merely an item to tick off a list.

But there is another way, and we hear from some of Australia's top brands that have tailored their own approach to reap the best rewards from local marketing.

There's been a shift from transformation having an endpoint, to the default setting for most marketers. Transformation of tools, teams, and the demands of what departments are expected to be responsible for has risen.

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Doing more with less, is no longer an end of year corporate speech, but a mantra that all must live by.

Taylor Fielding

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Indeed, [Gartner's 2024 CMO Survey](#) found that average budgets had fallen **15%** 'as CMOs pursue growth in the Era of Less'.

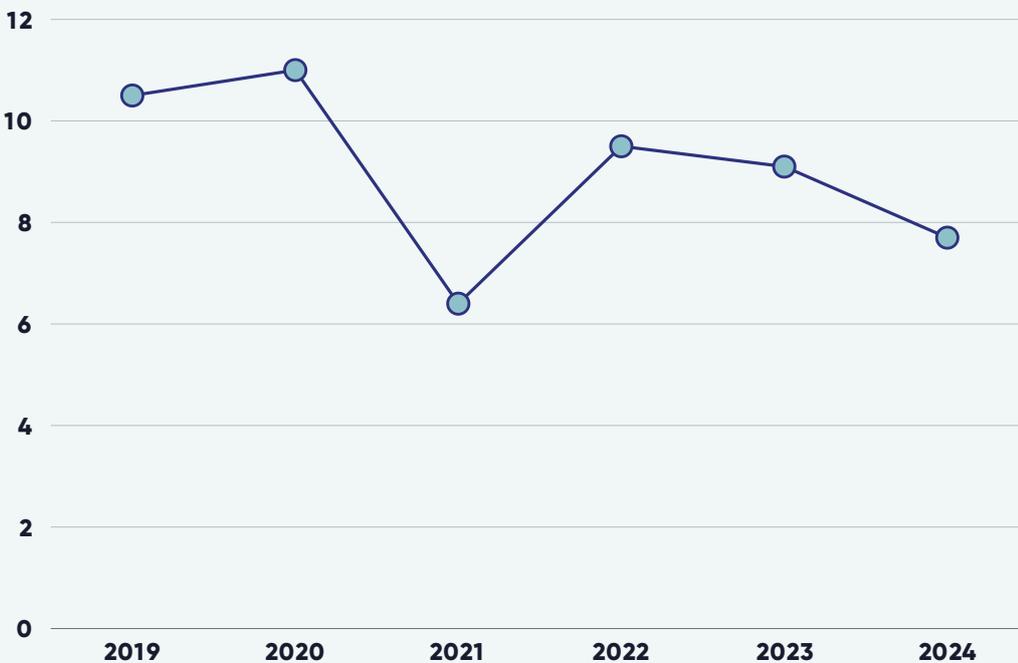
But in all of the race for results, as brands toil with marketing budgets now only **7.7%** of revenue (having fallen from **11%** pre-pandemic) of total revenue, it feels like we've forgotten to pack all our kit. The efforts to become more efficient have led to marketing principles of measurement and effectiveness being sidelined for easy

to deploy 'cookiecutter' personalisation tools. While automation platforms provide unparalleled access to information, if we all have access to them, are we separating ourselves from competitors?

When all rely on the same platforms, with the replica personas, differentiation becomes a distant hope; in essence all of our efforts become a darker shade of AI.

2024 Marketing Budget as a Percent of Total Revenue

Average Budgets Fall to Post-Pandemic Low



n = 395 (2024); 410 (2023); 400 (2021); 342 (2020); 342 (2019); 618 (2018); 350 (2017); 375 (2016) CMOs, Excluding "Don't Know"
Q What percentage of your revenue is being allocated to your total marketing expense budget in 2022?
Source 2024 Gartner CMO Spend survey. RESTRICTED DISTRIBUTION
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Source: Gartner (May 2024)

Executive Summary

- Discusses the impact of a fragmented customer journey
- Considers the challenges that remain for achieving cut-through
- Examines how organisations are implementing effective local area marketing campaigns
- Gives examples and a framework/methodology of best practices
- Includes exclusive interviews with executives driving successful LAM strategies
- Concludes how brands can best approach a winning approach in Australia

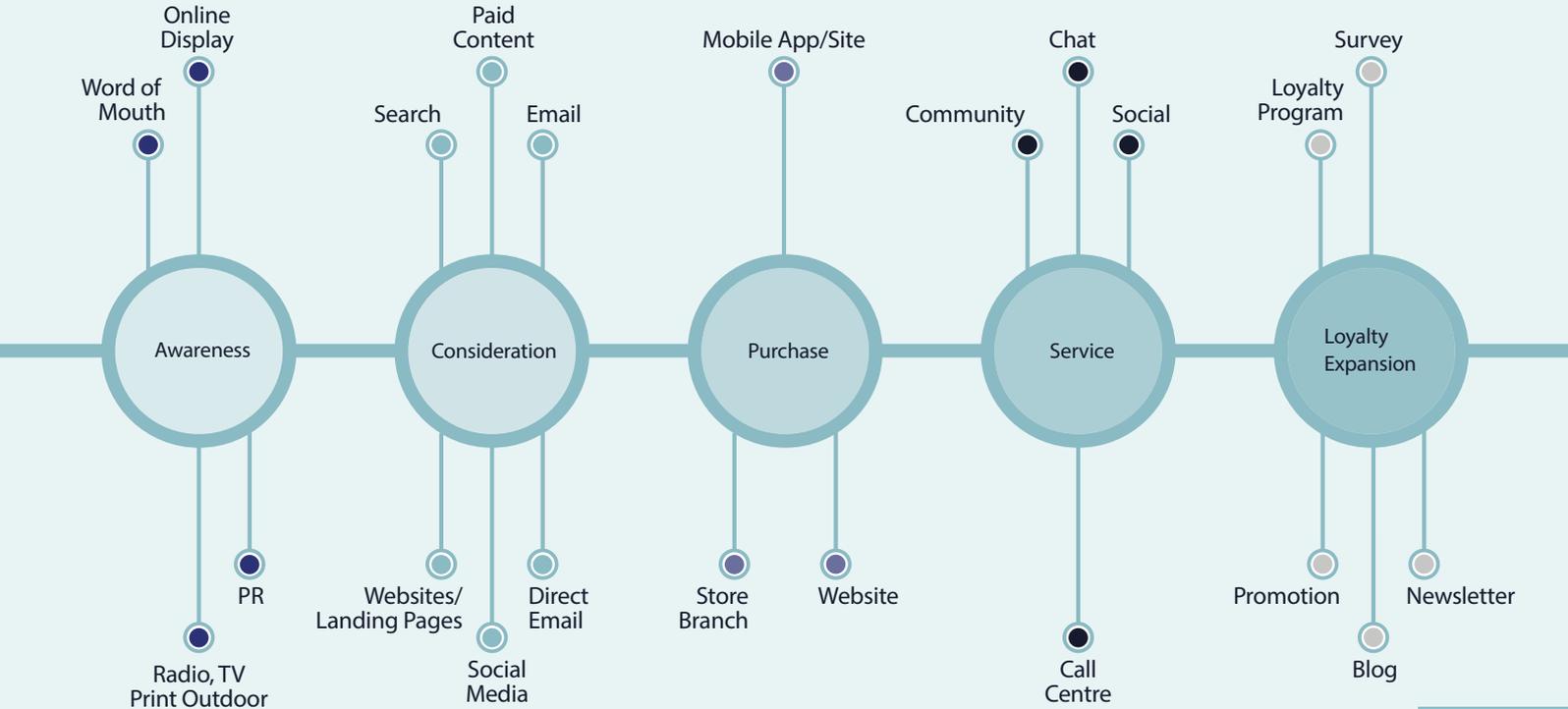
A continual journey of change

The past two decades have been transformative. Just look in your houses for evidence of how your daily life has been impacted by technology. Could you imagine being able to automate almost all of your household appliances, track every minute of your sleep and order a personal taxi to your house through a device in your pocket?

In 2005 no one could have foreseen the impact that social media would have on our lives.

The path to purchase for most consumers has altered greatly over this period as well. The once linear journey, now represents a fragmented cycle across touch-points in the real and digital world.

Customer Journey Map Planning



The priority and consequently ad budgets have swung towards digital over traditional media channels, now accounting for **57%** of budgets in 2024.

In Australia **62%** of all internet traffic is from a mobile device.

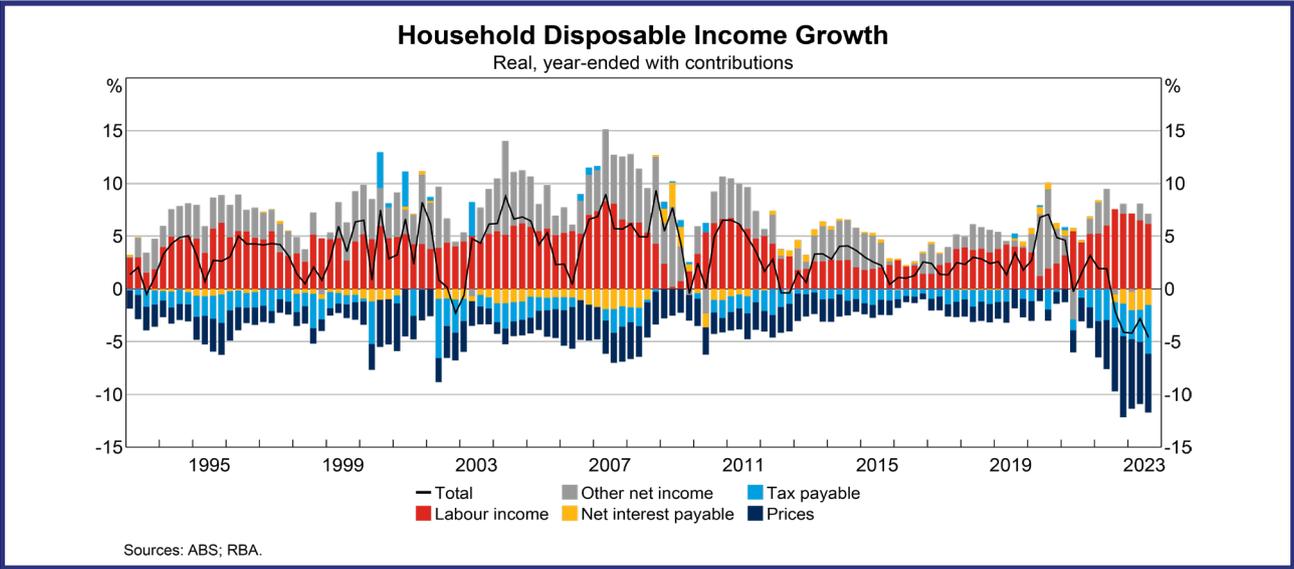
with over **90%** of the population connecting via mobile devices, one of the highest percentages globally.

The channels available to reach your customer have grown significantly over the past decade.

While the pandemic may have acted as a catalyst for some lasting e-commerce trends, in-person purchases still represent **82%** of total transactions in Australia.

If you're a local store, you need to understand your local market.

LAM based businesses (both franchise and retail) are having to fight harder for customers with disposable income being impacted heavily by inflation, high interest rates and low levels of confidence.



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**As a store owner
you need to know
if you're across
from a school or
retirement home -
it informs the mix of
everything you're
doing.**

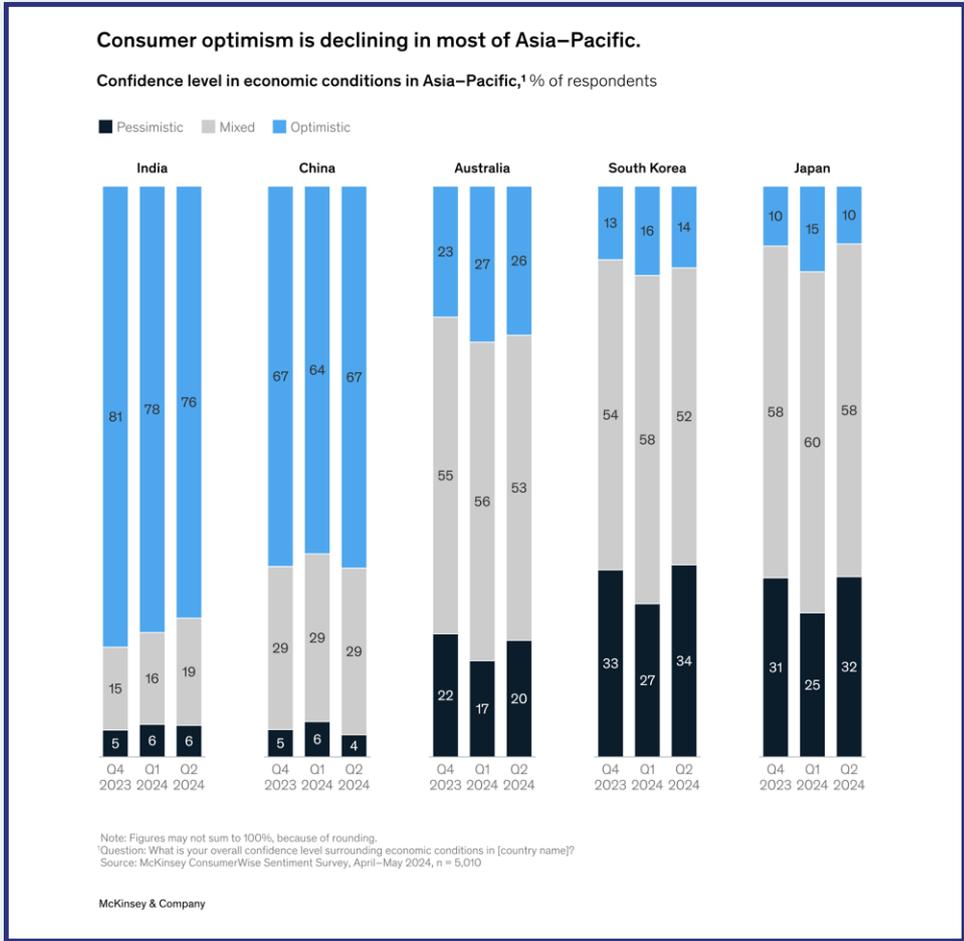
Adam Hickey, Consultant

for brand.

20 years ago, LAM budgets would have focused on print media, radio, TV and direct mail (such as catalogues). To illustrate the shift, today the local White Pages only exists online. The digitalisation of media has seen budgets diverted towards Search Engine Marketing (SEM) and Social Media (SM) campaigns.

70%
of digital advertising spend in Australia goes to Google/Meta.

The further fragmentation of audiences in traditional media has made digital mass-reach platforms all the more appealing. E.g. **63% of the Australian population are on Facebook**. And now through automated buying platform tools like PMAx and Advantage+ campaigns, advertisers are being spoon fed AI-driven tools which deliver results without meaningful performance metrics.

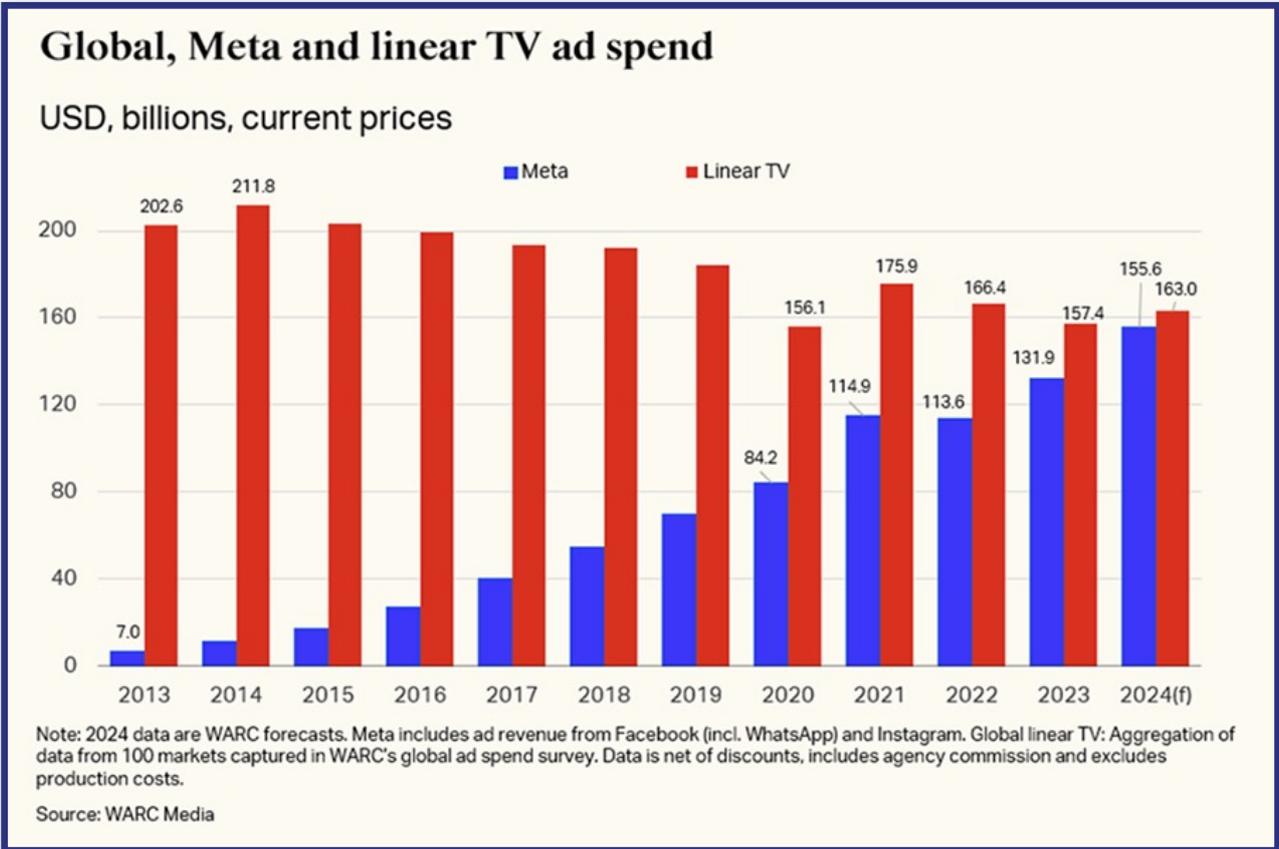


Challenges

More data, less insight

The rise of digital media and the segmentation that has come with it has brought an oversimplification. **In 2025, Meta will receive more ad dollars than Linear TV globally.** Many have commented that the overreliance on the platform has resulted in neglect towards other channels, particularly for those focused on LAM.

This represents a concern when it comes to measurement, as Meta is incentivised to prioritise its results while it only provides on-platform metrics like engagement and reach. It continues to mark its own homework, yet does not provide a holistic view for marketers of the impact it delivers.



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One of our major channels has become so saturated that it's not worth the money... we can't afford to waste money on a platform that doesn't seem consistent anymore.

Aimee Madson, CMO

 priceattack



Meta’s advertising revenue in 2024 grew 22% year-on-year, with ad impressions up 6% across all platforms and price per ad rising by 14% over that same period. The use of Artificial Intelligence can now do a better job predicting which audiences to target than the advertiser claims Mark Zuckerberg (pictured right) – previously, companies would have outlined demographic/psychographic information about their ‘proposed’ audience, but now it’s left to an algorithm.

We’re starting to see more competition on the platforms. Until the cost of living crisis, many local stores that were doing well have previously relied solely on foot traffic, and sales were good. However, our hypothesis is that many more are requiring money spent on advertising and are jumping straight into the thing they’re most aware of, which is Meta ads (through Facebook and Instagram predominantly).



TFM has seen this pattern of behaviour before, typically around Christmas. Advertisers with a lack of experience in the space and on the platform will continue to throw fuel to this fire, adding to the clutter and competition on the platform, with only Meta benefiting.

Meta’s advertising revenue in 2024 grew

22%

year-on-year, with ad impressions up 6% across all platforms and price per ad rising by 14% over that same period.



Do we have your attention?

Amplified Intelligence research shows that 75% of current budgets, without a view on attention metrics, are going to waste.

Its analysis shows there's a strong and significant relationship between Active (eyes-on-ad) Attention Seconds and Short Term Lift in brand uplift from a market share baseline. It outlines that for reliable attention measurement, advertisers should harness a combination of person-level (e.g. gaze tracking/facial detection) and impression-level data.

Meta feeds have been increasingly filled with suggested posts and ads, which can cause ad blindness and reduced attention from users. Some advertisers understand this and prioritise attention-proven Meta

formats. The remaining inventory is where the automated Advantage+ will run your ads for the lowest cost, which can

seem appealing to those spending on LAM. Yet the ROI rarely follows.

Whereas YouTube, BVOD and podcasts are more active attention channels, the latter's listeners are more willing to listen to ads all the way through. Once this is paired with a real-world data-backed strategy, it supercharges your message when talking directly to local

area customers at a 1 to 1 level.

We should be applying our marketing intelligence, across all touchpoints, at all levels of marketing, including the local storefront and its channels.



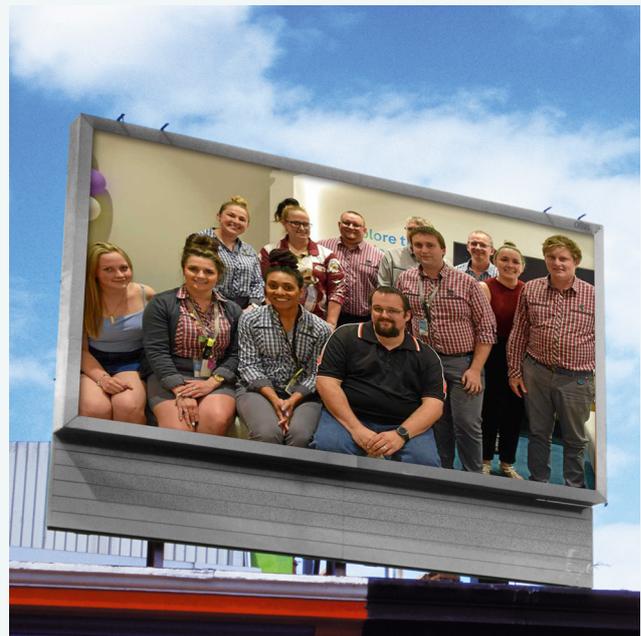


Tracking and measurement

There's no sugarcoating that this area is still very tough. Behind the technological capability of measuring efficiency across physical and digital touchpoints, there is still the issue of creative effectiveness. Will a national brand message have the same impact at a local level?

Telstra's Senior Marketing Specialist, Anjela Gilbert, explained: "It's about balancing a number of different messages in market" with network brand campaigns which have a localised tone. One of the major campaigns she's worked on recently ensured that local people and their faces were used taking in the breadth of the network in its national campaign.

We may be measuring more, but are we more measured in our approach? Are we applying the learnings from these insights? Measuring the impact of an awareness campaign to the bottom line remains difficult, even with the advanced tech stack available today.



Meta recently introduced AI-powered automated business tools like Advantage+ Shopping Campaigns. It's been one of the fastest growing ad products in the company's history. It's fair to say that by democratising this toolkit, every business can now have access to these automated advertising solutions on its platform.



There's a danger though in letting platforms that are paid on reach and engagement, report back on how successful a campaign has been. Often the metrics in reports aren't going to make a difference to an organisation's bottom line.

Kelly Healy, GM Advertising Sales QLD/SA/WA believes that through the scale and competition on these platforms, she agrees with our early analogy that Meta and Google now have created 'digital skip bins' where business owners are not getting the outcomes they deserve to achieve:

"They're not delivering outcomes for businesses. There's a lot of confusion from SMB's about what they need to do, and they need someone who is invested and rewarded on those outcomes of their campaigns, rather than having content which has been 'engaged' with but ending up with no leads."

// Business owners are not marketers, or media planners and buyers. They need guidance to be interrogating these campaigns - what is the best solution for the outcome I'm trying to achieve?

Kelly Healy
News Corp Australia



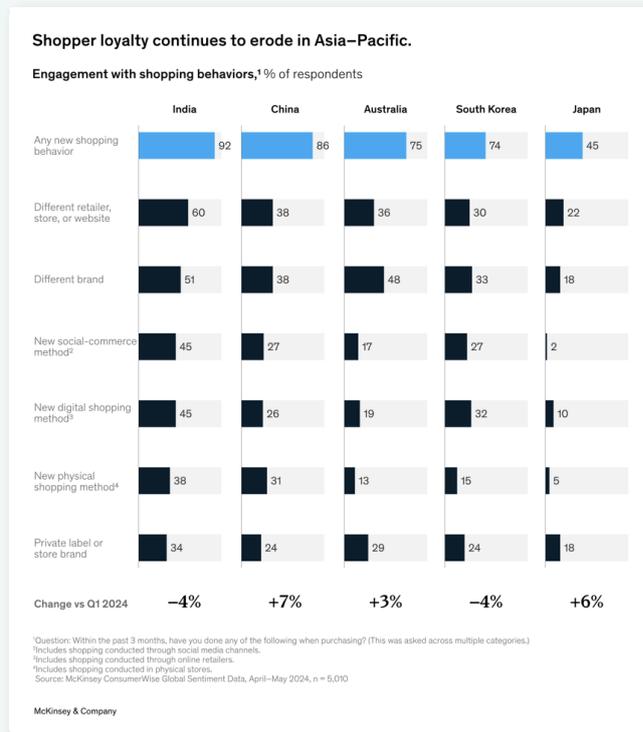


Loyalty

It's not what it used to be. Over the course of 2023, customer loyalty dropped 14% over the previous 12 months, down to just 65%. But revealed within that same survey were even more worrying trends for brands. Cost of living pressures continue to impact this with 23% in Australia confirming they can no longer afford to be loyal to a brand, with 63% stating they would switch products if a cheaper one was available.

This is not just true in Australia, but a regional issue in APAC. This McKinsey data (pictured right) from Q2 2024 illustrates the lengths Australians will go, with 75% having altered their shopping behaviour in search of greater value, an increase of 3% from Q1 2024:

Research from the Ehrenberg-Bass Institute discusses the Double Jeopardy Law and how it applies to B2B brands where smaller organisations suffer twice; from having fewer customers who are also less loyal.



Action plan

Preparing better - campaign, media and hygiene

Persistent economic challenges mean we have to fight smarter to reach our audiences. Over the past few years, marketers have become smarter.

Automated tools allow us to become more productive within brand marketing. Yet the application of marketing intelligence is often not filtering down to other areas like storefronts or community engagement of our Local Area Marketing (LAM).

Yet without a clear strategy and ongoing optimisation, ad spend can easily be wasted.

Poor planning and implementation can turn Facebook advertising “from a goldmine into a money pit”. Even with the right planning, marketers need to continually analyse results and adjust campaigns for optimal performance.

Organisations should review their marketing mix to ensure that all elements are

contributing towards campaign objectives. We need to ask if our work doesn't reach that goal, why are we doing it?

“
By switching agencies recently we saved 10% annually in what we were buying for our budgets.
 Jardin Ryan,
 Marketing Manager


Whether it's looking at the effectiveness of your campaigns, tracking and implementing location data, the efficiency of your tech stack or how relationships with your vendors are organised, a thorough review of how LAM is set up to deliver value to your wider business goals is advised.

AusBuild Marketing Manager, Jardin Ryan urges organisations to review current

practices first, and get the hygiene level of media set up right: “Setting up your paid media strategy requires an evaluation of how media is bought today. There may be savings to be found within the supply chain of your tech stack. Using an agency that can purchase directly with media owners has helped us save \$1m over the next five years.”



Improving mental availability

Understanding and leveraging the cues that category buyers use to access their memories in buying situations is important for any local area marketer. Yet we must remember research indicates that brand awareness is a much bigger problem than negative perception, after all you're unlikely to buy from a company you can't remember.

Ehrenberg-Bass also offers thoughts on the role of mental and physical availability, stating for B2B brands:

- Growth is achieved by increasing their mental availability (being easily thought of in buying situations) and physical availability (being easy to buy).
- Building and refreshing memory links to the brand is crucial, as these activate when buyers enter the market.

Consistent branding is crucial so using distinctive brand assets consistently across touchpoints helps build mental availability over time.

Adam Hickey, consultant at Orand understands the power of consistency: "Strategic brands are prioritising brand, employee and customer experience equally (and developing them in that order ideally). However when it comes to LAM, it is critical to know how these all feed one another in an ongoing and evolving way."

"Strong national brands should have the mechanisms in place to allow localised messaging that marries up to national brand campaigns - for local consumers to understand what they can get at those stores. There needs to be enough autonomy for regional store managers to deploy understanding and nuances at a local-level."



Power of local

People want to see themselves in the brands they connect with. Ensuring local insights and knowledge can lead to messaging that resonates more and ultimately delivers on marketing effectiveness.

Telstra's Anjela Gilbert mentioned that for its Network campaigns they aim to localise where possible 'Better on a Better network'. For it, they worked closely with people from local areas, to ensure that the tone of voice for the campaign felt authentic.

"We're given a bit of room to put a case together and test a campaign with local insights and research. Sometimes when you have so much access to data, not just the insight, but what that means for each customer."

In OOH, going local really offers the chance to act now, as a lot of inventory is within close proximity to a business, or can be. There's the ongoing opportunity to 'master the contextual messaging piece' explains IAB and JCDecaux's Brad Palmer. "It brings a level of accuracy. It's a one to many channel, running a campaign



Image pictured above: Telstra, Better on a Better Network campaign.

reaching many different audiences simultaneously. The power is to have limited wastage in your execution. Invest your marketing budget into locations which suit your audiences, and suit your time of day and budget you want to spend."

No one size fits all for an area or for a campaign Gilbert went on to explain. It's also hard to know where to get the best return, which is where the testing element comes in.



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As a marketer you may get some decision fatigue, and it can be difficult to know where to focus.

Anjela Gilbert



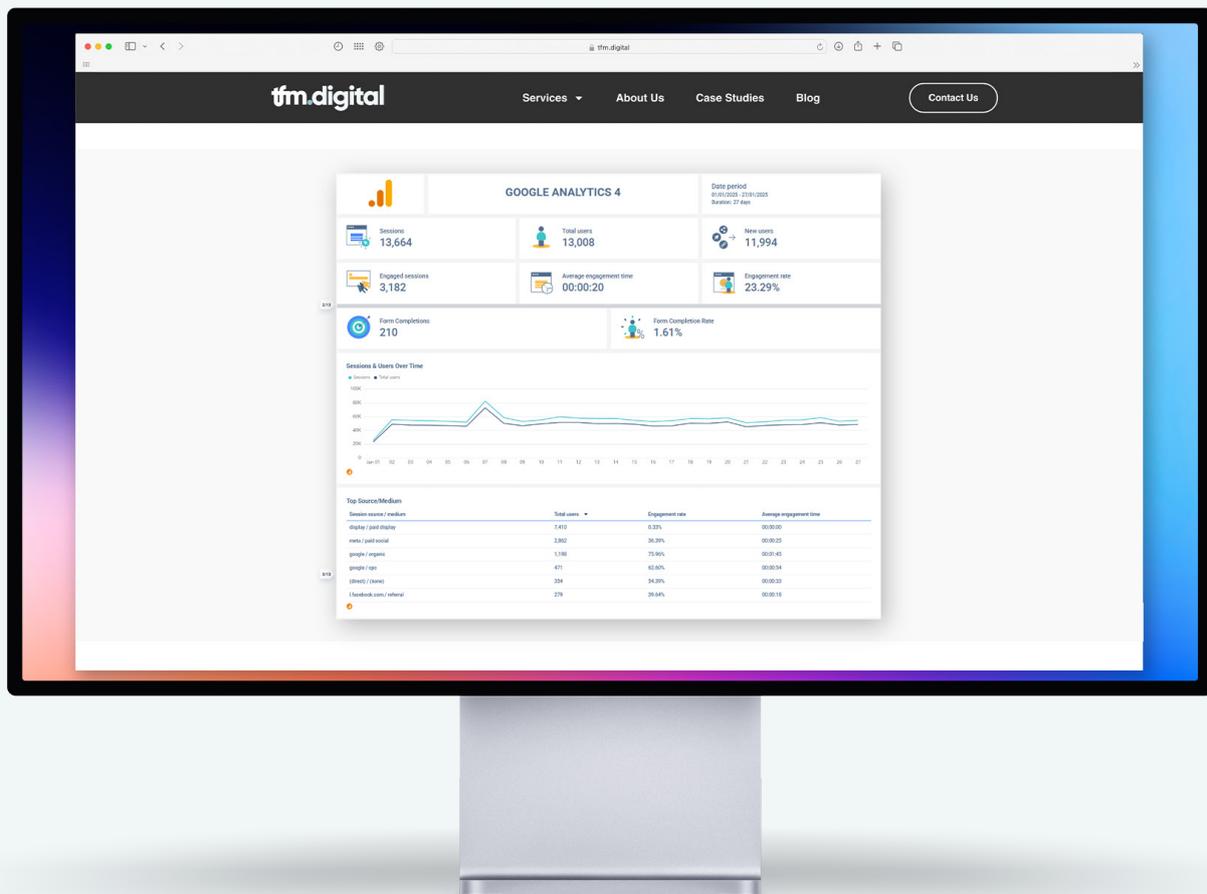


Test and learn

Around 20% of the media budget should be reserved for experimental buying. Seeing which platforms and formats may work best for your brand. Test, learn, iterate, test, optimise.

If an approach shows promise, double down and see if the results still come out favourably.

The other 80% should be going towards tried and tested methods which you can be confident will deliver results.





The rise of personalisation

For any message to be effective, it needs to deliver relevance, be the right message at the right time. If it doesn't resonate with the audience, you're not going to get the desired outcome.

Context can help improve your relevance. For example, seeing a sign for the Golden Arches at your next motorway exit, or redeem a pint at the pub around the corner from a digital sign in the city - both are going to have more impact because of the proximity.

Neuroscience has proven a **32%** increase in brain response when displaying a 'brand' or 'product' communication with relevant content containing an explicit call out at the most relevant moment (e.g. Friday evening, the sun is shining, time for a beer).

There are also lesser benefits to getting either moment or the content relevant with uplifts of **12%** and **18%**. Getting both parts right delivers a result better than the sum of its parts.





This is important for Local Area Marketers because they're going to be able to deliver more impact, verified by global research.

JCDecaux's National Programmatic Director Palmer outlines what this looks like in the OOH space: "We're seeing a lot more sort of an appetite for the brands that are more sophisticated with their creative messaging to actually start to provide contextually relevant messages at specific locations. Dynamic campaign optimisation. And that's inherently related to proximity of different sorts of assets.

The outcome doesn't always need to be a sale either. For some brands with products with a long lead time, the goal is to maintain interest and educate along the customer journey. Understanding the whole purchase cycle allows marketers to know which lever to pull, depending on where they are in their journey.

When speaking about delivering the right message Anjela, from Telstra said: "Our aim is always to hypertarget local areas to drive traffic into stores. We're more than happy for them to educate people online, but we know that customers are more likely to purchase in-store. So that's the job of our LAM. Drive traffic to where we can best convert."

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I think over the next 12 to 24 months we'll actually see a significant rise in location-based messaging in clients' creatives.

Brad Palmer,
JCDecaux's National
Programmatic Director as well
as IAB's Co-Chair IAB DOOH
Working Group

JCDecaux

CASE STUDY:

Price Attack

One business which is taking a 'bottom (of the funnel) up' approach is Price Attack.

The Haircare specialist may be entering its 40th year, but it's still evolving its marketing efforts to deliver better results.

//
**At one store
we've seen
an increase
of 26% year
on year.**

Aimee Madson



In a competitive sector standing out is always key and for Price Attack's CMO Aimee Madson that means remaining relevant at a local level.

"Our CEO relates franchising to an onion. At the core is Local Area Marketing, and then you have your regional level with national marketing on the outer layer."

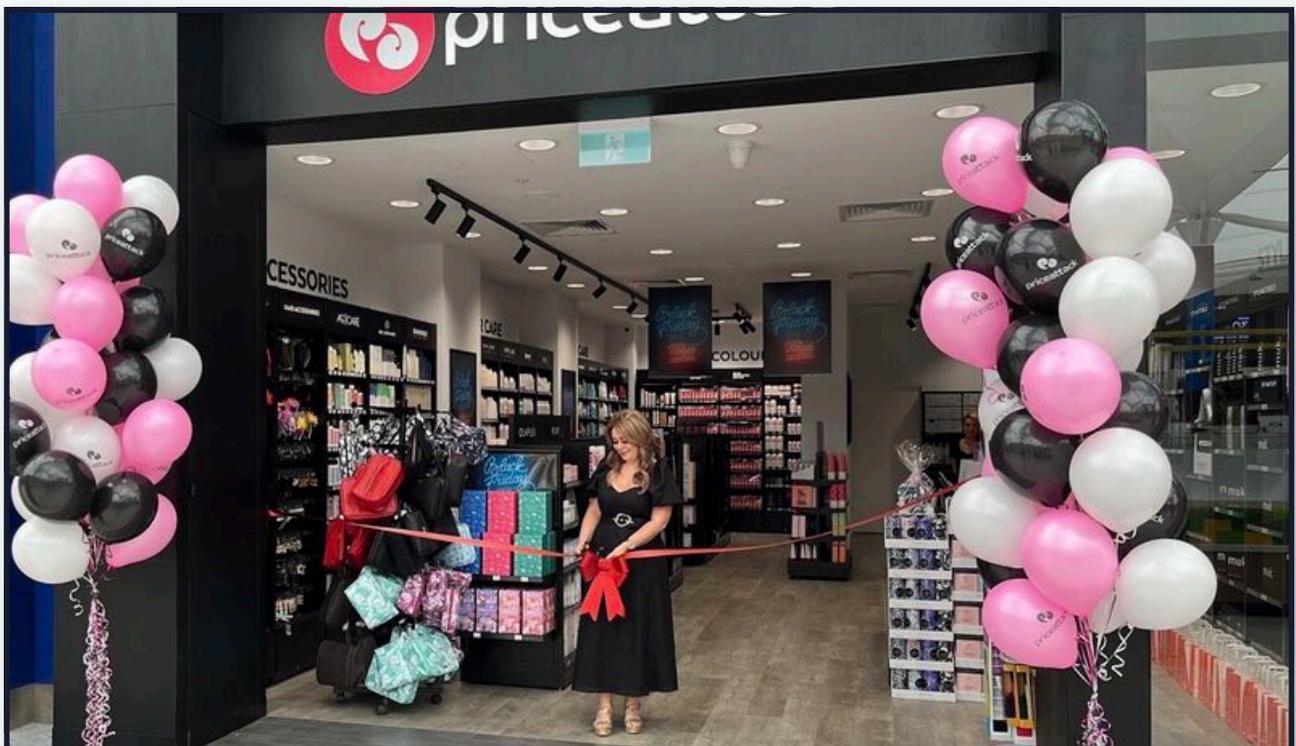
For one recent B2C store campaign, Price Attack focused its media on SMS along with a VIP night to get more loyal customers across the threshold. Whilst the sample data may be smaller, Madson maintains the early results are positive.

The experiential element is one the hair specialists are looking to grow moving forward. The next series will look to highlight and grow the new loyalty program Hair Points for their core audience.

“We’ve seen some great results from the real grassroots local area marketing, like SMS campaigns, your localised email campaigns, localised offers tailored to consumers. We did a VIP night for Christmas, with 14 of our stores where we invited customers in and for two or three of our stores, they had their biggest revenue day ever on those VIP nights. And these aren’t new stores. These are stores that have been around for 20 years.

It’s a massive result to have your biggest revenue day ever as a result of local area marketing.”

Price Attack says it’s shifting its focus to be smarter with its franchises’ money. Madson adds: “We need to be really confident where ad dollars are going because that’s franchise network’s money and we’re investing marketing initiatives which have to deliver for 55 small business owners.”



Conclusion

Local Area Marketing is not easy. It's hard to do at scale and be effective, given the challenges of an over reliance on digital, measurement issues, loyalty as well as making it feel connected to the people/nuances of an area.

Your brand needs to represent you and your customers. While Google removes its pledge to not use AI for weapons and surveillance, Facebook is removing fact-checking teams which brings brand safety concerns to the fore. This is within the first month of Trump's administration. In Australia, both represent where over two thirds of digital advertising revenue is spent, yet the 'Tech Oligopoly' has taken steps to not only make their platforms less effective, but for increased fees.

Automation tools are great, but remember your competitors have access to these same tools, so what steps are you taking to differentiate your brand to your local audience? Remember a brand's marketing efforts should always be to drive outcomes which improve the bottom line.

Rinse and repeat is no longer enough. In all honesty it never was, even when the economic outlook was better. So if your campaign isn't reaching that goal, why are you doing it?

Incentives can help drive short-term loyalty, but often these measures will fail to deliver in the long-term. Building brand advocacy is a commitment and should be viewed as such. The importance of word of mouth for many organisations cannot be overstated.

Cultivating true brand ambassadors will depend on a complete understanding of your customer, making personalisation a fundamental part of your strategy, not just a nice to have – and that bespoke experience needs to remain consistent no matter the channel, which makes it essential for marketers to embrace an omnichannel strategy.

Business leaders within the report



Taylor Fielding, CEO TFM Digital

Taylor is an award-winning CEO, with over a decade in marketing communications, media planning, and buying for some of Australia's leading brands. As CEO at TFM Digital, a proudly independent agency recently listed on AFR's FAST100 list, he helps franchise and multi-location organisations grow their businesses through media and marketing creativity.

Walking the talk, Taylor is also a franchisee himself, leveraging that experience in the daily operations to collaborate and share that knowledge and insight with other franchises to improve the overall performance and profitability of brands.



Adam Hickey, Co-founder and Director, Orand

Adam Hickey is the co-founder and director of Orand – an alternative marketing advisory and independent partner to brands and businesses across Australia and New Zealand. Orand currently works with a range of global brands and new-to-market start-ups across the retail, technology, sport & entertainment and media sectors. Prior to Orand, Adam spent almost 20 years working in media and creative agencies as both an award-winning strategist and market defining executive leader.



Aimee Madson, Chief Marketing Officer, Price Attack

Aimee Madson is an experienced marketing leader with a background spanning retail, eCommerce, and luxury automotive. She has held key marketing roles at MINI Australia and 99 Bikes focusing on brand strategy, customer engagement, and multi-channel advertising. Currently serving as Chief Marketing Officer at Price Attack, Aimee leads the marketing, eCommerce, and product teams, overseeing national campaigns, digital transformation, and omnichannel retail strategies. With extensive experience across traditional and digital advertising platforms, she has a deep understanding of customer behaviour and brand positioning in competitive retail environments.



**Kelly Healy, GM Advertising Sales
QLD/SA/WA, News Corp**

Kelly is an innovative Senior Media Executive with over 20 years experience in Television, Radio, Print, Audio, and Digital Media. She has held executive positions at some of Australia's leading media corporations, as well as award winning full service agencies. Kelly has successfully launched a creative integration department that has received several awards for their client service, as well as creative thinking. She has a proven track record in developing award winning campaigns, as well as building and developing high performing, award winning, sales teams.



**Anjela Gilbert, Senior Marketing
Specialist, Telstra**

Anjela is an experienced Retail and Local Area Marketing professional with experience in the telecommunications industry. Working as a Senior Marketing Specialist for Telstra she has proven ability to strategise, plan and execute effective marketing campaigns across multiple platforms. Prior to Telstra, the passionate customer experience advocate spent almost 12 years in the marketing team at Vita Group Limited, finishing as National Marketing Manager, Retail.



**Brad Palmer, Director at JCDecaux
Australia**

Brad Palmer is the National Programmatic Director at JCDecaux Australia, as well as the Co-Chair of IAB's DOOH Working Group. A media professional of 15 years and leads JCDecaux Australia's programmatic ambitions within the emerging Digital Out-of-Home channel. Held various roles at leading publishers such as Pedestrian Group and News Corp. An active participant in both the IAB and OMA programmatic Out-of-Home working groups and also a member of JCDecaux's International Programmatic Council.



**Jardin Ryan, Marketing Manager,
Ausbuild**

Jardin is an experienced retail/property marketing leader with a demonstrated history of working in the retail industry for the likes of Super Retail Group, Woolworths, Westfield, Broncos Club and The Coffee Club Australia. Over the past two decades, he's become skilled in strategy, brand management, research, media and digital, campaign management, sponsorship and PR. Today, he leads a team as Marketing Manager for property specialists at Ausbuild.

About TFM.Digital

There are over 1600 franchise groups in Australia. Yet until 2020, there were no dedicated marketing agencies serving this niche. The sector remained an afterthought for traditional agencies. While working at one networked holding group, Taylor Fielding was consistently quizzed by curious business owners about using digital media to expand their franchises.

When asked to create a tailored approach for one franchise as a favour, Fielding used the opportunity to pioneer a new sector. By blending data-driven strategies and a creative flair with media, TFM.Digital helps businesses forge stronger lasting connections with their audiences. Launching at the height of the pandemic was a risk, but news of these niche services spread quickly, and TFM thrived - so much so that it was cited in Australian Financial Review's FAST 100 list.

TFM educates and continues to build industry knowledge through regular industry-wide reports on high-value franchise prospects. These Future Franchisee reports provide SA4 level data so franchise groups can see where to best target new franchisee campaigns. A combination of earned media along with capital city roadshows for these reports, has grown not only its clients' franchise businesses, but also fueled TFM's rise to notoriety as the go-to consultancy in the franchise and multi-location marketing space.

TFM.Digital is a dynamic digital marketing and media agency dedicated to fueling business and franchise growth. We blend data-driven strategies with creative flair to elevate your brand. Our mission is simple: to help businesses forge stronger, lasting connections with their audiences.

FINANCIAL REVIEW

100
FAST

PRESENTED BY



WE MADE THE
FAST 100 LIST

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