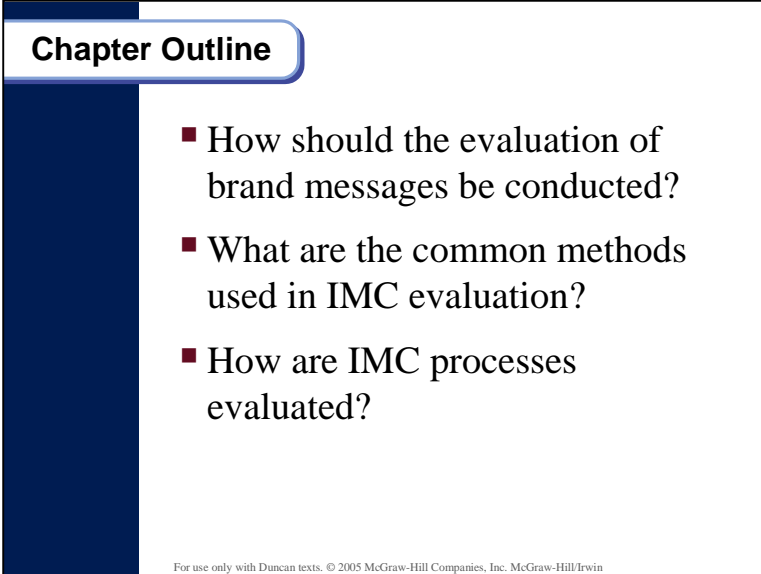# CHAPTER 22:  MEASUREMENT, EVALUATION, AND EFFECTIVENESS

## Chapter Objective

To identify and explain some of the tools that can be used to measure the effectiveness of MC programs.

## Chapter Key Points



**Chapter Outline**

- How should the evaluation of brand messages be conducted?
- What are the common methods used in IMC evaluation?
- How are IMC processes evaluated?

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This chapter addresses three key issues:

1.  How should the evaluation of brand messages be conducted?
    - The chapter discusses three different types of approaches to the evaluation of messages.

2.  What are the common methods used in IMC evaluation?
    - The chapter identifies and explains a number of methods for evaluating MC media and messages before, during, and after the messages are exposed to consumers.

3.  How are IMC processes evaluated?
    - The chapter identifies and explains some measures for evaluating IMC processes and their communication, sales, stakeholder relationship effects.

# Chapter Perspective



Chapter Perspective

😊 **Good News**

Technology now provides the opportunity to collect incredible amounts of data on consumer-brand measures

🙁 **Bad News**

How can we sort through all this data to examine the most important measures?

Because many of the elements that drive brand equity are intangible, such as brand awareness, brand knowledge, and customer satisfaction, measurement is more complicated than simply looking at sales and profits. However, with the availability of a wide range of information-collecting technology that tracks sales and profitability, has enabled companies to do a better job of evaluating MC efforts. Such things as scanner data, customer databases, and automated customer service operations are generating enormous amounts of marketing data that can be used to evaluate MC programs. As a matter of fact, in many companies, the primary challenge is not collecting more information but finding the time to analyze and make use of the data that already exists.

One of the most important ways to meet this challenge is to measure and evaluate brand messages and customer interactions. This includes generating feedback on brand strategies and the different brand messages and campaigns that are used. This chapter discusses two types of IMC audits—the mini-audit and the in-depth audit. It then considers evaluation and measurement of brand messages in general before looking at specific methods. It ends with a discussion of the benefits and limitations of evaluation.

Opening Case:  Molson

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**Challenge:** → Increase Molson's market share in Canada

**Answer:** → An IMC program featuring:
- TV and magazine advertising
- PR events at hockey games and movie theaters featuring the "Joe" commercial character
- Website that allowed users to create their own TV spot

**Results:** →
- 3% increase in brand awareness
- 2.5% increase in market share

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- 3% increase in brand awareness
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Discussion Starters:
1) This brand should have some inherent interest for students, although the Canadian context may be a bit unfamiliar. So a good opening question might be to ask what other Canadian beer brands they are aware of (if no one responds, prompt them with Labatt's and Moosehead).
2) Putting the case into context, ask the students if the program described in the case would gain their interest, and ask how many would actually try the "make your own TV spot" option on the website.
3) As a rough measure of effectiveness, ask how many students would switch from other brands to Molson because of this campaign—and compare that score with the 2.5% increase in market share noted in the case.


# Lecture Outline

I. Evaluation And Measurement Of Brand Messages
   A. Critical marketing challenge: being accountable
      i. Determining whether objectives have been met

      ii. Conducting gap analyses



Ad Demonstrates The Gap Analysis Concept

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1. *Measure of the difference between what customers expect from a brand (based on brand messages) and what they actually experience*

B. Evaluation value
    i. Good value: decisions that have major brand equity implications
        1. Example: replacing the Pillsbury Doughboy icon
    ii. Questionable value: decisions that probably don't have major brand equity implications
        1. Example: putting a cowboy bandana on the Doughboy for a new western cornbread product ad

C. Evaluating data that already exists
    i. Many organizations already have data—that they don't use
        1. Example: warranty cards with customer information that are received by never tabulated and analyzed

D. Evaluation timing



Evaluation Timing

Evaluation Timing

Concept Testing

Concurrent Testing

Evaluative Testing
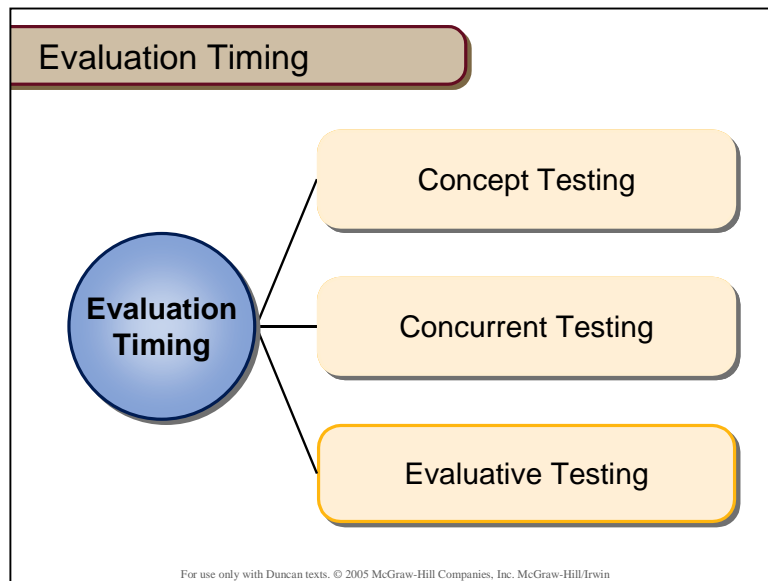
    i. Concept testing
        1. *Measures the effectiveness of the rough ideas that become brand and campaign themes*
    ii. Concurrent testing
        1. *Testing that tracks the performance of messages as they are run*
    iii. Evaluative testing
        1. *Measures the performance of the brand messages against their objectives at the conclusion of the program*

E. Measuring objectives



**Measuring Objectives**

**Step 1: Determine which to measure**
•Awareness
•Knowledge
•Persuasion
•Trial and repeat
•Growth

**Step 2: Establish benchmarks for the measure(s)**
• *The beginning point, or where things stood right before the MC effort began*
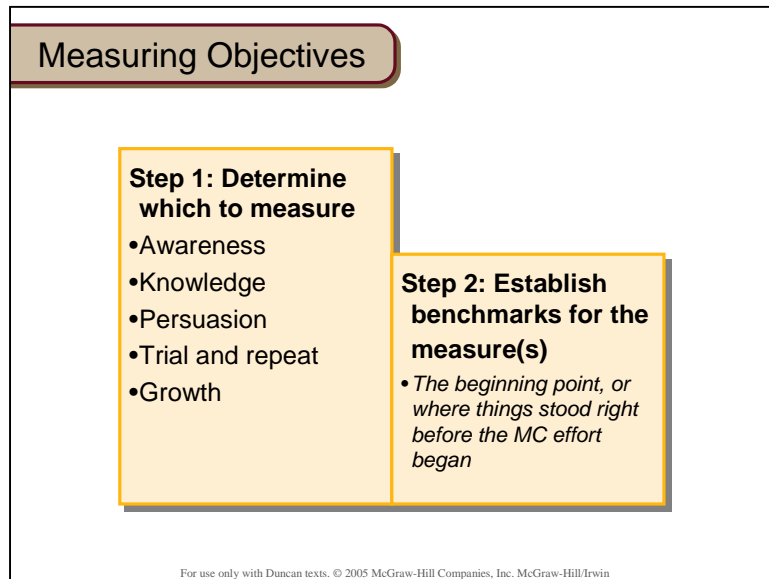
   i.  Step 1: Determine which to measure
       1.  Awareness
       2.  Knowledge
       3.  Persuasion
       4.  Trial and repeat
       5.  Growth
   ii.  Step 2: Establish benchmarks for the measure(s)
       1.  *The beginning point, or where things stood right before  the MC effort began*

II.   Measurement and Evaluation Methods
    A.  Media



**What Are The Common Methods Used In IMC Evaluation for Media?**

**Examples**

**TV:** Nielsen measures how many viewers watched a show

**PR:** monitoring services track print and broadcast mentions

**Websites:** internet services track the number of hits
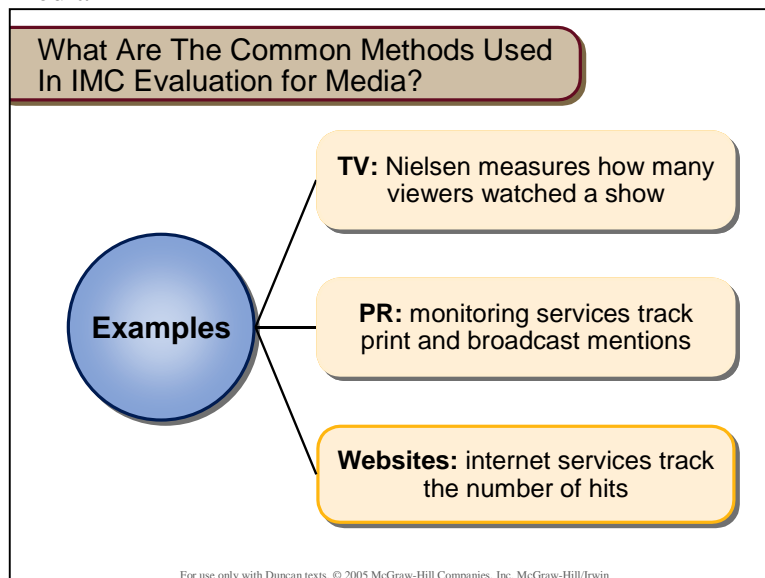
  i. Objective: determine if the media is delivering the message
    1. Examples:
      a. TV: Nielsen measures how many viewers watched a show
      b. PR: monitoring services track print and broadcast mentions
      c. Websites: internet services track the number of hits

B. Message testing

## Message Testing

**Objective: determine if the message is persuasive**

**First step:** Testing concepts and creative strategies

**Second step:** copytesting to predict effects

**Third step:** testing to measure persuasion
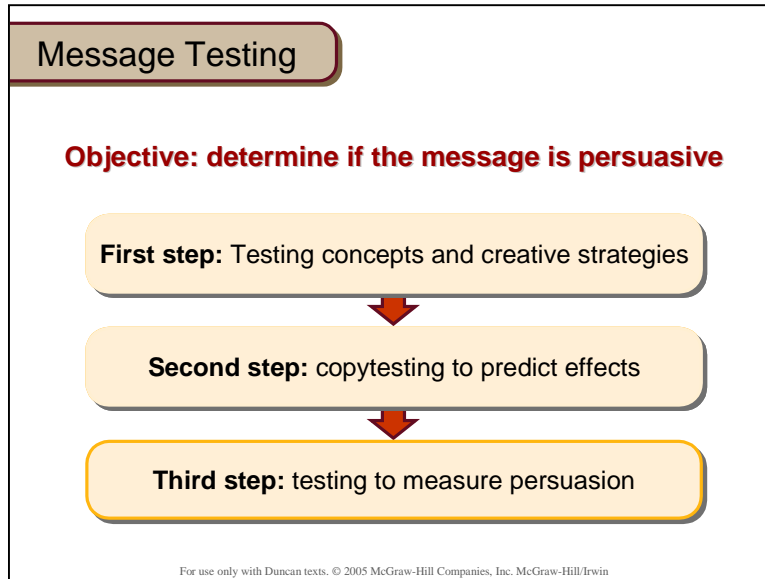
  i. Objective: determine if the message is persuasive
    1. First step:
      a. Testing concepts and creative strategies, using:
        - Intercept surveys
          1. *A survey in which people in a mall or at an event are stopped and asked to respond to a short questionnaire*
        - Focus groups
          1. *An evaluation technique in which 8 to 12 members of a brand's target audience, led by a moderator, discuss some aspect of a brand, product category, or message strategy*

IMC In Action:  IBM

**IMC In Action:** IBM

**Challenge:** → Help define and "own" the infrastructure market

**Answer:** → IBM worked with its agency to develop and test the "solutions" campaign concept
• First step: exploratory research
• Second step: proposed commercials were tested for effectiveness
• Third step: image measure was rated at 100

**Results:** → • Image measure rose from 100 to 113
• Campaign exceeded objective by 354%
• Campaign helped generate 1,600 sales leads

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Challenge:   Help define and "own" the infrastructure market

Answer:   IBM worked with its agency to develop and test the "solutions" campaign concept
  - First step: exploratory research with internet executives to gain insight
  - Second step: proposed commercials were tested for effectiveness
  - Third step: IBM's image measure was benchmarked at 100

Results:
- IBM's image measure rose from the 100 benchmark to 113
- Campaign exceeded new business generation objective by 354%
- Campaign helped generate 1,600 sales leads

Discussion Starters:
1) Students may have only limited knowledge of this type of campaign since they are not the primary target, but a personal computer exercise, using IBM, might help illustrate the point. To start, ask students to rate their attitudes toward IBM PCs on a scale of 1-5 (1 = very unfavorable; 5 = very favorable), and calculate the mean score (this is our benchmark).
2) Next, poll the class to determine the three most important features they would like to see in their "ideal" new PC, and rank order them on the board.
3) Finally, tell the students that IBM has a new PC that delivers all three of their top features, all at a very affordable price. Now ask the students to rate IBM PC's again, using the same scale as above, and taking the new features into consideration. Calculate the mean score on the board and compare it with the benchmark.

2. Second step: copytesting to predict effects
    a. Testing for attention
        - Using a tachistoscope
            1. *A device that exposes a brand message briefly to test participants to measure how long it takes for a certain message or elements to be communicated*

    b. Testing for awareness and knowledge
        - Recognition
            1. *The act of identifying and remembering that you have seen something*
                a. Identifying a person you know within a crowd of people

        - Recall (or unaided awareness)
            1. *The more difficult process of bringing forth a brand message from memory*
                a. You may recognize a person in a crowd, but you may not be able to recall the person's name
                b. Measured by asking respondents to name all the brands they can think of in a product category

Tales From the Real World

Sometimes MC managers can use data as a crutch to make bad decisions. One real world example is of a brand manager whose team spent $200,000+ creating a new TV commercial.

The pre-test data for the commercial were positive—but came in one point below the desired level. Instead of making a gutsy move to go ahead and air the commercial, the manager "played it safe" and scrapped the entire campaign. The commercial never ran—until a new brand manager uncovered it and used it to successfully support the brand.

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    c. Testing for emotional responses
       - Likability
         1. *Found to be a powerful predictor of sales success*
    d. Testing for physiological responses
       - Galvanic skin response test
         1. *Uses an instrument  to measure minute electrical currents*

        2. Measures to what extent respondents are stimulated or aroused when exposed to a variety of brand messages

- Pupil dilation
    1. *Tracks the dilation of the pupil*
    2. The greater the indication of involvement in the brand message being shown
- Eye-tracking
    1. *Uses an infrared beam to follow the eye, converting its movement to traces on the ad being tested*
    2. Measurements show which ad elements attract the most attention

3. Third step: testing to measure persuasion
    a. Theater Tests
        - *Tests in which people are invited to a location for the purpose, they are told, of critiquing a TV program, but actually for the purpose of evaluating their response to a brand message*
            - Following the showing, respondents are asked about the program and what commercials they remember seeing (a measure of advertising recall)
            - Can also include a free "test purchase" of any brand they like at a small store in the theatre—that is recorded

    b. Test marketing

## Test Marketing

**Test marketing:** A research design in which an MC campaign is run in two to four markets for anywhere from 3 to 12 months

- The most valid persuasion test because it takes place over a longer period in a competitive marketplace

- *A research design in which an MC campaign is run in two to four markets for anywhere from 3 to 12 months*
    - The most valid persuasion test because it takes place over a longer period in a competitive marketplace

**c.** Scanner market test



In Scanner Markets, Participants Purchases Are Tracked

NOW THERE'S A BETTER WAY TO **INCREASE CALL CENTER PRODUCTIVITY.**

- *A single test market in which researchers have recruited a panel of household members that agree to have a buyer identification card (like a frequent-buyer card) scanned every time they go shopping so their purchases can be tracked*

d. Tracking Studies

## What Are Tracking Studies?

**Tracking Studies:**
Periodic trend surveys that measure brand awareness, trial, repeat, and customer satisfaction of a brand and its competitors

## An Example of Tracking Study Data
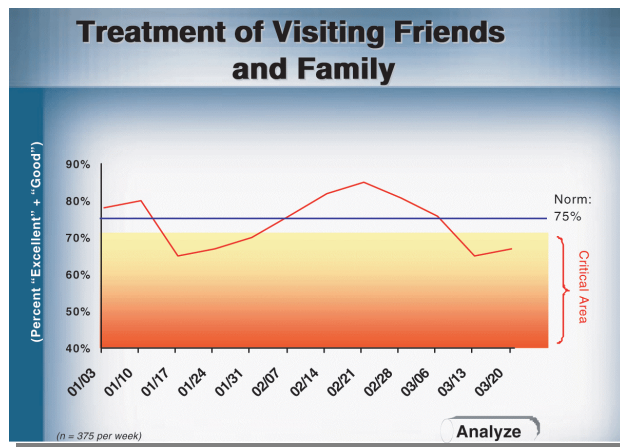
**Treatment of Visiting Friends and Family**

(Percent "Excellent" + "Good")

90%
80%
70%
60%
50%
40%

Norm: 75%

Critical Area

01/03 01/10 01/17 01/24 01/31 02/07 02/14 02/21 02/28 03/06 03/13 03/20

(n = 375 per week)

Analyze

- *Periodic trend surveys that measure brand awareness, trial, repeat, and customer satisfaction of a brand and its competitors*
    1. Now available in real-time to shorten the reporting delay

III.   Evaluating The IMC Process
       A. IMC audit



IMC Audit

**IMC audit:** An in-depth research method for evaluating IMC relationship-building practices.

Examines:

- The organizational structure
- Understanding of MC objectives and strategies
- Strategic consistency of brand messages

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i. *An in-depth research method for evaluating IMC relationship-building practices.*
   1. Examines:
      a. The organizational structure
      b. Understanding of MC objectives and strategies
      c. By leadership and employees
      d. Strategic consistency of brand messages

▷ **INSTRUCTOR IN-DEPTH INSIGHT:    IMPORTANCE OF INTERNAL COMMUNICATION**

**Insight:** Importance Of Internal Communication

Internal communication is particularly important in cross-functional MC management. If the MC process is not managed and executed by people who are in constant touch with each other, the result will be confusion rather than communication. Unlike the car industry, which can announce a recall when it discovers it has installed defective parts, it is virtually impossible to recall a million brand messages to replace a broken promise.

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B. Brand metrics



Brand Metrics

**Brand Image Measures:**

- Overall awareness of the brand
- Understanding of the brand positioning
- Brand relevance—important and meaningful
- Brand preference—the level of customer purchase intent

**Brand Impact Measures:**

- Sales
- Market share
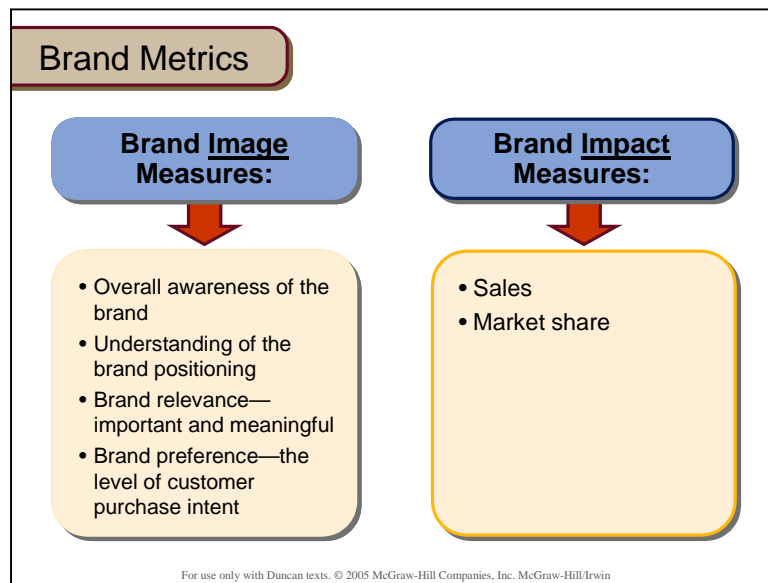
i. *Measures of brand image and impact*
1. Brand image measures*:*
   a. Overall awareness of the brand
   b. Understanding of the brand positioning
   c. Brand relevance—how important and meaningful it is
   d. Brand preference—the level of customer purchase intent
2. Brand impact measures:
   a. Sales
   b. Market share

C. Relationship metrics



Relationship Metrics

Lifetime Customer Value (LTCV)

Recency, Frequency, Monetary (RFM) analysis

Referral index

Share of wallet

Relationship Metrics
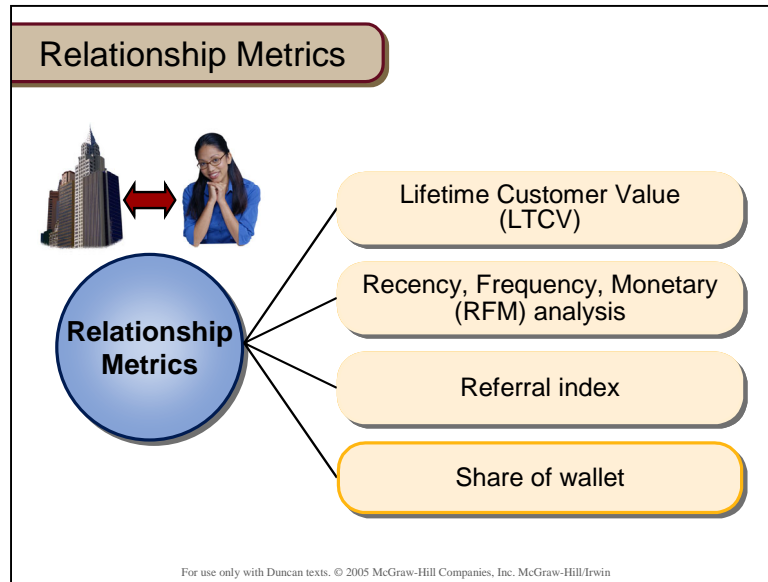
   i. *Developed specifically for IMC programs to track the development of brand relationships*
      1. Lifetime Customer Value (LTCV)
         a. *Measures what an average customer is worth in revenue*
      2. Recency, Frequency, Monetary (RFM) analysis
         a. *The more recently people buy, the more often they buy, and the more they spend, the better customers they are*
      3. Referral index
         a. *Tracks the percentage of new business resulting from a customer/stakeholder recommending your brand*
            - A high referral index score = strong relationships
      4. Share of wallet
         a. *Percentage of customers' total category purchases for your brand*

D.  Benefits of evaluation



**Benefits and Limitations of IMC Evaluation**

| Benefits | | Limitations |
|----------|-----|-------------|
| • Reduces risks<br>• Enriches planning and managing<br>• Provides controls<br>• Documents MC contributions | **Vs.** | • Costs for staff and measurement services<br>• Time consumed by testing and analyzing<br>• Validity and projectability Questions<br>• Reduced creativity |
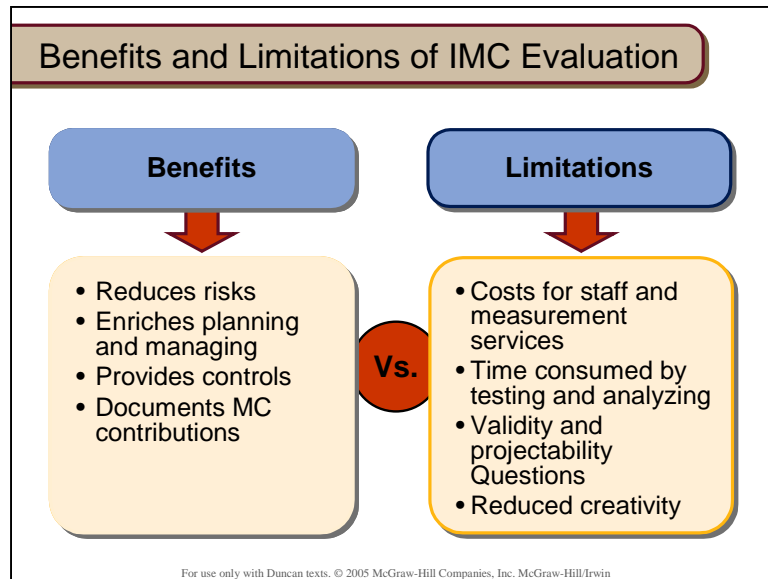
   i.  Reduces risks
  ii.  Enriches planning and managing
 iii.  Provides controls
 iv.  Documents MC contributions

E.  Limitations of evaluation
   i.  Costs for staff and measurement services
  ii.  Time consumed by testing and analyzing
 iii.  Validity and projectability questions
 iv.  Reduced creativity
  v.  Reduced creativity

IV.    Final Note



**Final Note:**

*Measurement and evaluation are more than just the accumulation of data*
- *Smart managers know how to quickly focus on the key metrics—and act on them to increase profits*

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A. Measurement and evaluation are more than just the accumulation of data
   i. Smart managers know how to quickly focus on the key metrics—and act on them to increase profits.

# Answers to Review Questions

**1) Brand Message Research**

a. Why is it important to evaluate brand messages before they run?

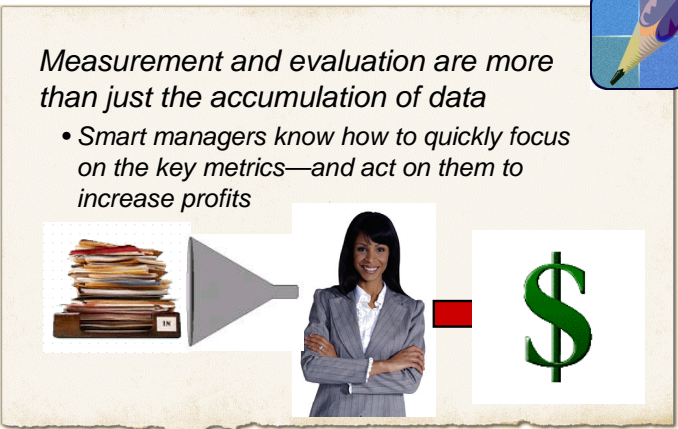*Answer: The primary reason for evaluating brand messages before they run is to reduce risk. The idea is to determine the probability of success up front, before the money is spent. In particular, marketers want to know whether the level of success will be high enough to justify the program's cost, an analysis that shows the return on investment (ROI). The more that is at risk, the more developmental evaluations and measurements should be used. Evaluation is generally undertaken for critical decisions that involve a lot of money, resources, and/or staff time, such as changing a logo or launching a year-long campaign.*

b. How does evaluation reduce risk?

*Answer: The text provides a good illustration of how evaluation can reduce risk. Specifically, if Pillsbury is considering replacing its familiar Doughboy with a more modern character, the company would probably spend hundreds of thousands of dollars testing and evaluating alternatives before making such a high-risk decision. After all, hundreds of millions of dollars have already been invested in building awareness of the Doughboy as spokesperson for the brand. Switching spokespersons is a big decision than can cost the company dearly if the wrong choice is made.*

c. How and why is the cost/value factor important in conducting evaluation research?

Answer:  *Using the Pillsbury example from 1 (b), the text provides an example of a situation when the value of conducting evaluation research would probably not justify its cost. Specifically, if Pillsbury planned to introduce a new cornbread product using the Doughboy in brand messages related to the launch, it would probably not be worth spending money to evaluate whether the Doughboy should or should not wear a cowboy bandana in the ads. The extent of the bandana's impact on the overall brand message would be so minor that spending time and money researching the question would not be cost-effective.*

d. What role do objectives play in evaluation?

Answer:  *Objectives are essential to any evaluation program for the simple reason that an effective MC program is one that meets its objectives. This means that MC planners must set measurable objectives. The closer these objectives can be related to sales and profits, the better they are. But only in the areas of direct marketing and sales promotion is it possible to easily measure message effectiveness by sales. The problem with using sales results alone to evaluate the impact of all marketing communication efforts is that MC represents only one set of variables that affect sales—and does not factor in other variables like product performance, pricing, distribution, and competition.*

## 2) Methods

a. What is concept testing? Why is it used?

Answer:  *Concept testing is the first step in developing a campaign. It is used to determine the most compelling message concept, creative theme, or primary selling proposition for a brand—prior to the development of any final MC message materials like commercials, print ads, or a website.*

b. When copy testing is used to evaluate the communication impact of a brand message, what kind of effects are investigated?

Answer:  *Copy testing can be used to measure and evaluate several aspects of communication, including the following effects: its ability to attract attention; brand/message awareness, using recognition and recall measures; understanding and knowledge, using one-to-one personal interviews to measure how much respondents know about a brand and to what extent they see it as different from its competitors; emotional responses, using likability measures; and physiological responses, using techniques like a galvanic skin response test, which measures minute electrical currents that indicate the extent to which respondents are stimulated or aroused when exposed to a brand message.*

c. Describe three tests that evaluate the persuasive effectiveness of a brand message.

Answer: *Three types of testing techniques have been developed to measure the degree of persuasion that a message can deliver, each providing a little more validity than the one before: theater setting, theater/store, scanner market tests, and*

*conventional test markets. The more a test simulates real life and includes behavioral responses, the more validity the persuasion score will have.*

d. Explain how online interactions can be used for research purposes.

*Answer: Online techniques have become a helpful aid to researchers because they have helped address the problem that most traditional customer satisfaction tracking studies take so long— to plan, execute, analyze, and report the findings—that they are not timely. Now, immediate feedback gathered from websites using panel surveying (sending out questionnaires to those who have agreed beforehand to participate) and data delivery (distributing measurement findings online) can provide information on a real-time basis that can be used in monitoring and changing strategies. These "intelligent" online reporting systems can also alert managers about customer satisfaction problems as they develop and point to the sources of these problems.*

e. How are awareness and perception studies used in the evaluation of marketing communication?

*Answer: Many marketers continuously study measures like awareness and perceptions as part of a program of tracking studies. These are periodic trend surveys that measure brand awareness, trial, repeat, and customer satisfaction of a brand and its competitors. Because tracking studies are on-going, they offer test-and-control as well as pre- and post measures of new campaigns and other major changes in the marketing and marketing communication mix. This is done by making the change in a couple of the markets being tracked, then using the other markets that are being tracked as control markets.*

f. What is the difference between pre- and post-testing?

*Answer: Pre-testing describes the research work conducted with consumers to determine their reaction to MC messages prior to their transmission by media vehicles. This work is conducted to test the potential communication effectiveness of the messages and to detect areas for improvement that can be made through revisions to the messages prior to their exposure to consumers through the media. Post-testing describes the research work conducted with consumers after an MC message has been transmitted by the media. This work is done to confirm that the messages are having their intended effect in a "real world" setting.*

g. You work as a creative person in an agency; the person next to you works as the marketing manager for a company. Explain how the two of you might differ in your views about copy testing.

*Answer: Student answers will vary somewhat, but one typical answer could be that there would be some disagreement between the creative person and the marketing manager over the value of copy testing. From the manager's perspective, copy testing is an appealing tool that can be used to test various aspects of a proposed message—and to make changes to optimize the message's effectiveness. Unfortunately, the creative person would likely view copy testing*

*in a less appealing light. Specifically, the creative person might view copy testing as a threat to creativity. They might fear, for example, that an innovative new creative concept might not "test" as well as an approach that has been used for years—but which might not be as attention-getting. The creative person might also point out some of the copy testing validity concerns raised in the chapter, specifically, that test program content can influence a score, as can the number of competitive commercials that are running at the same time. The creative person is also likely to point out that copy tests, especially those done under laboratory conditions, may not reflect how the brand messages would perform in the marketplace and argue that creative work cannot be reduced to numbers. Ultimately, therefore, the manager and the creative person are likely to disagree. Unless the disagreement can be resolved with an acceptable compromise, the creative person may become discouraged and put in less creative effort on future projects.*

h.  Explain the debate in the industry about the use of marketplace measures to evaluate the effectiveness of advertising and public relations.

   *Answer:  Like the debate above, there is likely to be disagreement over the use of marketplace evaluation techniques. On one hand, many researchers are likely to argue that the techniques being used to measure the effectiveness of a brand in the marketplace are not perfect, but are still very critical because some type of feedback is necessary. On the other hand, others on the MC team might be a bit skeptical of some of the measurements, suggesting, for example, that the shortcoming of all evaluation efforts, and especially measurements of marketing communication efforts, is that customers, competitors, and other elements in the marketplace are always changing. They would argue that these measures should be placed in a larger context since too much research can be counterproductive. For example, if a brand team insists on researching everything, and doing so until the results are exactly what it wants, it may lose many opportunities. Just as some managers prefer to make decisions without research, others are so risk-averse they are afraid to make any major decision without a lot of measurement support.*

### 3) IMC Metrics

a.  Why would you want to bother conducting an IMC audit? What would you learn?

   *Answer:  An IMC audit would be beneficial to most organizations because it would provide a baseline from which to begin to evaluate future MC efforts. Hopefully, the audit would provide greater understanding of the organization's MC structure, as well as the extent of understanding of MC objectives and strategies within the organization and the extent to which people agree with them. It would also provide learning on the degree to which current brand messages are strategically consistent.*

b.  How does an IMC audit differ from a communication audit? What would you learn?

   *Answer: An IMC audit is more detailed than a communication audit, because it goes beyond an evaluation of the messages an organization is sending and examines*

*issues such as interactions with customers and other key stakeholders, levels of internal sharing of information, and levels of cross-functional planning. This type of evaluation is critical because these issues are more important in IMC than in the practice of traditional marketing because more processes are used, and they must be integrated to be effective Because these are critical processes, they need to be effectively managed, which can be done only if they are periodically evaluated and monitored.*

c. Explain the underlying logic behind lifetime customer value quintile analysis.
    *Answer: Student responses will differ, but one possible answer would be to describe the concept in terms that relate to the "80/20 rule" described earlier in the text. Using this approach, a student might explain that "LTCV quintiles are just a way of looking at purchases made by the top '20' of the '80' as well by the other groups of '20' and comparing how they relate."*

d. What does RFM stand for? What is included in this type of evaluation?
    *Answer: RFM stands for "recency, frequency, monetary," and is a type of analysis often used by direct marketing organizations. It has found that the more recently people have bought, that the more often they buy, and the more they spend, the better customers they are.*

# Chapter Challenge

<u>Writing Assignment</u>
Pick a local company and develop an evaluation program for its marketing communication program. In a 2-page memo, outline and explain all the various types of research and evaluation methods that you would recommend be used.

<u>Presentation Assignment</u>

Develop a program to evaluate relationships for your favorite restaurant. Present to your class a set of relationship metrics, and explain what information they uncover and how that information can be used in developing MC strategies.

<u>Internet Assignment</u>
Visit InsightExpress's website (www.insightexpress.com) for an example of the types of services online research companies provide. Prepare a report for your instructor on how and when to use the services of this company.

<u>Research Assignment</u>
From books and relevant articles that you can find, outline how an IMC program that aims to achieve the goal of effectiveness should be evaluated.

<u>IMC Plan Team Assignment</u>
At this stage in their semester-long project, students should decide upon the types of objectives they will be setting for their IMC plan, and the appropriate measurement techniques, described in the chapter, that they will use to evaluate their objectives.

# IMC Final Project Checklist #22

**Due Date:**_____

☐ **Your Agency Name:**

~ **Objectives**
*Identify which of the following type(s) of objective(s), discussed in the chapter, that you recommend for your campaign, and state each in a concise manner that is quantifiable and includes a specific time frame.*

   ~ **Brand image objectives**

      ~ Awareness

      ~ Knowledge

      ~ Persuasion

   ~ **Brand impact objectives**

      ~ Trial and repeat

      ~ Sales

      ~ Market share

   ~ **Relationship metrics**

      ~ Lifetime Customer Value (LTCV)

      ~ Recency, Frequency, Monetary (RFM) analysis

      ~ Referral index

      ~ Share of wallet

~ **Types of measurement you plan to conduct**
*Identify which type(s), discussed in the chapter, you plan to use.*

~ Concept testing

~ Concurrent testing

~ Evaluative testing