

JICMAIL: Mind the Measurement Gap

An industry perspective on
the journey towards full effect
campaign measurement

**JIC
MAIL**

Mail Media Metrics

**DM
A**
Data &
Marketing
Association

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Introduction

Measuring marketing effectiveness has always been, in part, a process of grappling with different measurement methodologies and doing your best to create as coherent a picture of what has and hasn't worked with the available pieces of the jigsaw. The problem is that as you attempt to complete the picture, people keep throwing more pieces of the jigsaw into the box for you to fit in. Multi-channel media consumption, the death of third-party cookies, data silos, and walled gardens – each presents a unique set of challenges to the contemporary measurement practitioner.

The fact that the measurement of marketing effectiveness is an increasingly complex task can often be a dispiriting state of affairs for the average marketer. However, the simplicity of what practitioners are trying to quantify remains the same: Clear incremental effects attributed to marketing activity.

The DMA's Intelligent Marketing Databank provides a unique perspective on the challenges of sub-standard campaign measurement, and its overall impact on marketing effectiveness. The DMA was, therefore, an ideal host for a roundtable discussion between industry experts from agencies, brands, industry bodies, and consultancies – all providing points of view on a range of questions relating to the most prevalent gaps in campaign measurement:

1. What types of metrics are we using to articulate marketing effectiveness?
2. What can we do to bridge the gaps between direct response and brand marketing?
3. What can we do to encourage more real-world testing and learning?
4. What challenges do post-pandemic 'phygital' experiences present for measurement?
5. Are we considering the impact of multi-channel on measurement best practice?
6. What does the new world of attention-based planning and buying mean for measurement?

We hope you enjoy both the unique insights from the DMA's Intelligent Marketing Databank presented in this report and the resulting discussion they stimulated with the roundtable. Do let us know what you think, and more importantly what you are doing to help close the measurement gap!

Tim Bond

Director of Content Strategy and Insight, DMA

Ian Gibbs

Director of Data Leadership and Learning, JICMAIL

Roundtable attendees

Roundtable attendees represented a cross-section of marketers and measurement practitioners:

Sandra Doyle

CRM Strategist,
Specsavers



Matt Dailey

Chief Performance Officer,
Havas Media Group



Nuala Kennedy

Chief Data Officer,
People's Postcode Lottery



Clare O'Brien

Head of Media Effectiveness
and Performance, ISBA



Richard Slater

Managing Director,
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Adam Edelshain

Director, PwC



Lynda Helyer

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Wunderman Thompson



George Gloyn

Head of Business Analysis,
MediaCom



Sophie Greder

Director of New Business,
Marketreach



Stephen Maher

Chair & CEO MBASack /
Chair DMA



Sophia Walmsley

Marketing Effectiveness Lead,
Santander UK



Mark Cross

Engagement Director,
JICMAIL



Tara Pickles

Customer Support Manager,
JICMAIL



Ian Gibbs

Director of Data Leadership
and Learning, JICMAIL



Foreword – JICMAIL

At JICMAIL, our core remit is to provide market-leading mail media metrics that reveal how consumers interact with and respond to Direct Mail, Door Drops, Partially Addressed Mail and Business Mail, and to support users to create value from the data across their campaign planning and buying routines. Our data is embedded into the sell-side and buy-side alike, and nearly 200 different organisations now take our data to help them pitch, plan, activate and measure their campaigns.

However, our mission is broader than this. As a Joint Industry Currency, we are among a small handful of organisations that have a uniquely independent trusted status from which to promote best practice in campaign planning and measurement. As such, our broader mission is to continually support marketers, planners and measurement practitioners who find themselves dealing with the myriad challenges of campaign measurement on a daily basis.

In as much as no media exists in isolation in a multi-channel world, this mission extends beyond mail: good measurement practice is media-neutral, seeks marketing effects and is of equal relevance to agencies, specialists, clients and media owners alike.

As we support the industry in tackling these challenges, we are keen to share our learnings and experiences in how to close the gaps that exist in campaign measurement. With better measurement we believe comes better marketing effectiveness benefiting the entire marketing discipline. We welcome your input into the debate and invite you to attend future forums hosted by JICMAIL on the topic.

Do get in touch and share your views.

Mark Cross

Engagement Director, JICMAIL

Ian Gibbs

Director of Data Leadership and Learning, JICMAIL

Exec summary

An analysis of the DMA's Intelligent Marketing Databank laid the foundations for an in-depth discussion around the key measurement challenges faced by marketers and practitioners. Six key themes were explored:

- 1. 41% of the metrics used to measure campaign effectiveness are campaign delivery and digital vanity metrics.** Despite an industry hooked on measuring short-term outcomes and easily accessible digital campaign reporting, marketers and measurement practitioners have a responsibility to refocus the measurement conversation on brand, response and business effects. Marketing effectiveness hit a five-year low in 2021. To arrest the decline in marketing effectiveness, the industry must first work on improving measurement best practice.
- 2. Silos across disciplines, channels, teams and client-agency relationships must be broken down to plug the gaps in full-effect measurement.** Too many marketing teams are still siloed by channel, and with each channel targeted according to different brand and response goals, these silos create self-interest detrimental to business performance. Agencies working with new and existing clients need to lead on a rigorous onboarding process that really helps advertisers break down these silos by focusing on their overall business priorities.
- 3. Multi-channel creates a double-edged sword.** On the one hand, it enables advertisers to take advantage of significant effectiveness multiplier effects, yet on the other, it creates a world of increased complexity with each channel battling to prove attributable and incremental effects.
- 4. Test and learn depends on not only measuring the right metrics,** but also the right *number* of metrics, pinning them to business outcomes and applying learnings to future activity. While the immediacy and efficiency of digital lends itself nicely to scalable test and learn initiatives, half of the metrics used to measure digital channels are less meaningful campaign delivery metrics, compared to just 28% for Ad Mail. Planners and practitioners must focus their test and learn efforts on the metrics that matter, while becoming comfortable with the fact that an element of imperfection will always exist within measurement plans.
- 5. Digital effect reporting is on the rise.** 10% of the metrics in the DMA's Intelligent Marketing Databank were digital-specific metrics in 2017. This has nearly doubled five years later. With reporting of digital effects on the rise, it is more important than ever for offline channels to have their digital impact properly attributed. JICMAIL data shows that the mail channel now drives significant volumes of digital traffic and store footfall. As physical and digital experiences blend for brands, measuring the incremental impact of each is vital. The ability to quantify true incrementality must be the aspiration of all full-effect measurement frameworks.
- 6. Marketers and measurement practitioners need to think in terms of consumer 'touchpoints' not 'channels.'** A channel-lead mindset, even in a multi-channel world, still leads to the type of siloed thinking that only hinders good measurement. The shift to 'touchpoints-lead' thinking fosters a more channel-neutral mindset and is more likely to result in full effect measurement.

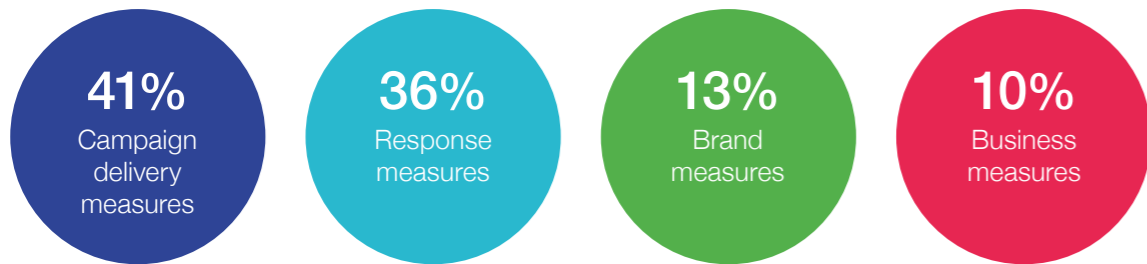
How we measure effectiveness

The DMA's Intelligent Marketing Databank reveals that across over one thousand campaigns entered into the DMA Awards, marketers are using a staggering 170 different metrics to articulate campaign effectiveness. While this number is an important red flag to businesses (after all, how can we have a joined-up and coherent conversation about campaign impact with so many different metrics in play?), it is the profile of these measures that should also give marketers and measurement practitioners cause for concern.

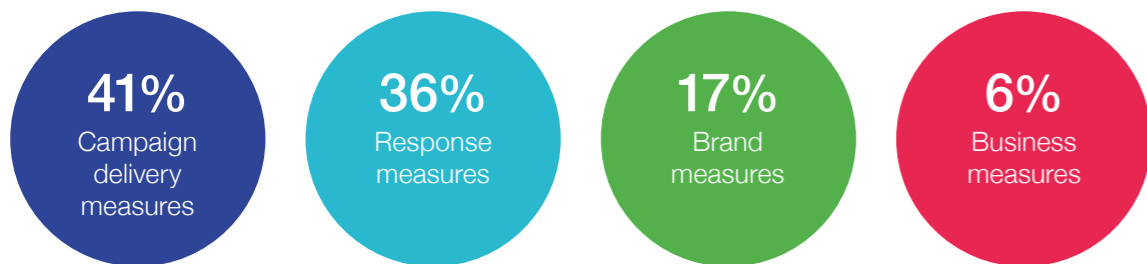
In 2021, of the 170 measures used by DMA Awards entrants, 41% related to campaign delivery metrics (such as reach, frequency and digital vanity metrics such as clicks, likes and shares), 17% related to brand measures (such as brand awareness, consideration and brand perceptions – i.e. the types of effects associated with stimulating long-term demand), 36% related to response metrics (e.g. short-term sales, revenue and customer acquisitions), and the remaining 6% to Business metrics (i.e. the sort of metrics that speak the language of the board room and relate to profit growth, shareholder value and market share improvement for example).

Profile of effectiveness measures identified

2017 to 2020



2021



While campaign delivery metrics such as reach, frequency and impressions are vital in the campaign planning phase, they tell us little about true campaign outcomes. It is concerning, therefore, that the incidence of campaign delivery measures used in campaign reporting has remained stable at 41% over the last five years. While the increased usage of brand measures (up from 13% in 2017–2020 to 17% in 2021) will be encouraging to brand marketers and above-the-line channels that excel in this space, this improvement seems to have come at the expense of business metric reporting.

Direct response and brand effectiveness is very much the language of the CMO, the former often relating to short-term marketing impact and the latter long-term impact. The language of business effects – share price movements, profit growth and EBITDA, for example – is very much that of the CEO. With CMOs currently facing the lowest tenure¹ in the boardroom in a decade, it is vital that they speak the language of business effects as much as possible. With geopolitical uncertainty continuing to plague the global economy, marketing budgets will continue to be heavily scrutinised. To demonstrate the impact of marketing spend on the measures that shareholders and investors care about the most is vital to ensuring the long-term health of the industry.

“With geopolitical uncertainty continuing to plague the global economy, marketing budgets will continue to be heavily scrutinised.”

41%

The reporting of campaign delivery effects has remained the same year on year

¹<https://www.marketingweek.com/cmo-tenure-lowest-level/>

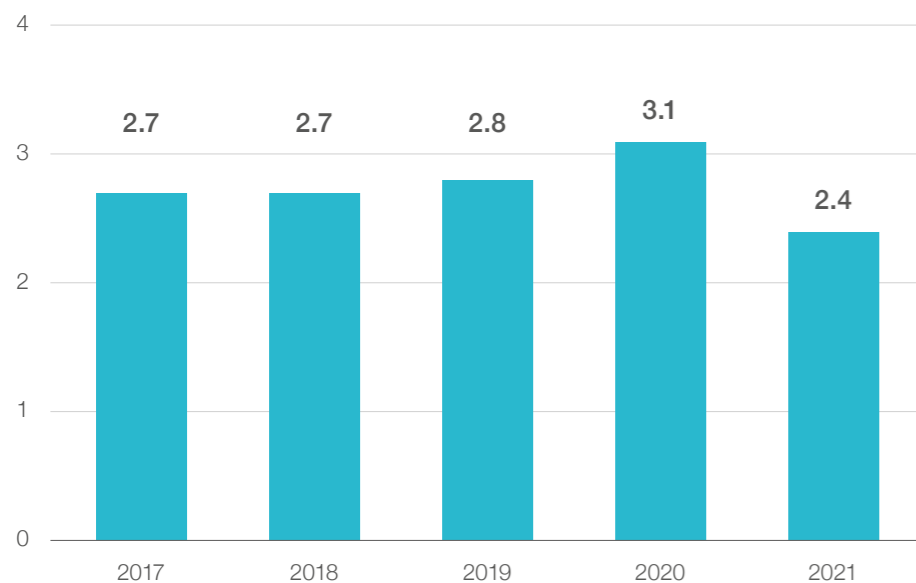
Is sub-par measurement prompting a decline in overall marketing effectiveness?

In the early pandemic phase of 2020, marketing effectiveness improved year on year – generating more effects per campaign than in the previous three years. Marketers showed tremendous adaptability with constrained budgets, while consumers who were stuck at home during periods of national lockdown proved themselves to be highly responsive to advertising and marketing. A year later, this trend had reversed, prompting a half-decade low for effectiveness.

The DMA's Meaningful Marketing Measurement 2022 reportⁱⁱ provides plenty of explanation for this downward trend – namely an imbalance between short-term activity and long-term activity, and too much focus on targeting existing customers rather than acquiring new ones. In the spirit of *measuring* marketing effectiveness, however, we need to ask ourselves whether it is reasonable to hypothesise that sub-standard measurement leads to declining marketing effectiveness. If our campaign measurement is below par, and if we are measuring the wrong type of effects, then how can we truly be optimising the performance of future campaigns with robust past campaign learnings?

It is this question amongst many others that we put to our roundtable attendees.

Total number of effects per campaign



ⁱⁱ <https://dma.org.uk/research/meaningful-marketing-measurement-2022>

The roundtable attendees identified several reasons why marketers and measurement practitioners are so focused on less meaningful campaign delivery metrics:

- 1. Immediacy and instant results:** There is an industry focus on immediacy and instant results and marketers have become hooked on the delivery of short-term outcomes, often to the detriment of long-term success. Digital campaign delivery metrics, in particular, are very easy to get hold of and so end up dominating measurement plans and drawing the focus away from the measurement of business effects.
- 2. Legacy business issues:** The measurement of campaign effectiveness is complicated. Many businesses know where they want to get to with their measurement processes, but they do not know how to get there. This is often a legacy issue of how businesses – particularly large businesses – are set up, with silos existing between different teams (e.g., brand and response, retention and acquisition, etc.) and a lack of joined-up thinking between them. At the same time, agencies often struggle to get the effectiveness data they need from the clients who are silo-heavy.
- 3. Start-up mentality:** However, start-ups and smaller businesses are also guilty of an addiction to less meaningful campaign metrics. Many start-ups inevitably have a digital heritage, and this is the language they are most comfortable speaking in. Start-ups must move into different marketing channels if they want to grow and in doing so, they have to move to different measurement practices that demonstrate the incremental effects of working with new channels.
- 4. Channel specificity:** Campaign measurement is often very channel-specific with each channel speaking a slightly different language in a way that doesn't link up to the broader picture. Often campaign learnings are very media-focused and miss quantifying the impact of creativity – and of course, creative is vital to campaign success.
- 5. Focus on responders:** When coming from a direct response background, everything has to be slavishly linked to a positive ROI – this is particularly true of the mail channel. However, in measuring the 5% of people who have responded to a campaign, the 95% who have been reached but haven't responded are ignored. This 95% have all had a meaningful brand exposure but when focusing solely on ROI, these effects are not quantified. Where open rates and click throughs are assigned weight and meaning in the digital world, the same metrics are rarely considered for physical media – weighting credit in favour of those digital channels that simply have more metrics at their disposal.
- 6. Delivery metrics have their place:** There was a degree of defence for some campaign delivery metrics, however. It was acknowledged that some delivery metrics are more strongly correlated to campaign outcomes than others and may, therefore, serve as a useful proxy for effectiveness when planning. It is down to marketers to assess these correlations and links for their own business, rather than blindly reporting on a full suite of campaign delivery effects, however.

Views from the roundtable

“There is so much data that is so easily available... and people have become obsessed with efficiency and short-termism, whilst measuring effectiveness is hard. The easiest way out is to show that something happened and not whether that *something* is really of any value.”

Matt Dailey, Havas Media Group

Key implications

1.	41% of the metrics used to measure campaign effectiveness are campaign delivery and digital vanity metrics	Despite an industry hooked on measuring short-term outcomes and easily accessible digital campaign reporting, marketers and measurement practitioners have a responsibility to focus the measurement conversation on brand, response and business effects.
2.	The reporting of business effects linked to marketing spend has declined over the last two years	Larger advertisers must break down siloed ways of working, and start-ups must look outside of their digital comfort zone: both of these steps will result in more transparency as to how marketing spend influences business performance.
3.	Marketing effectiveness hit a five-year low in 2021	To arrest the decline in marketing effectiveness, the industry must first work on measurement best practice. Only by accurately gauging the drivers of campaign success and feeding these learnings back into future campaign plans, can we hope to improve effectiveness overall.

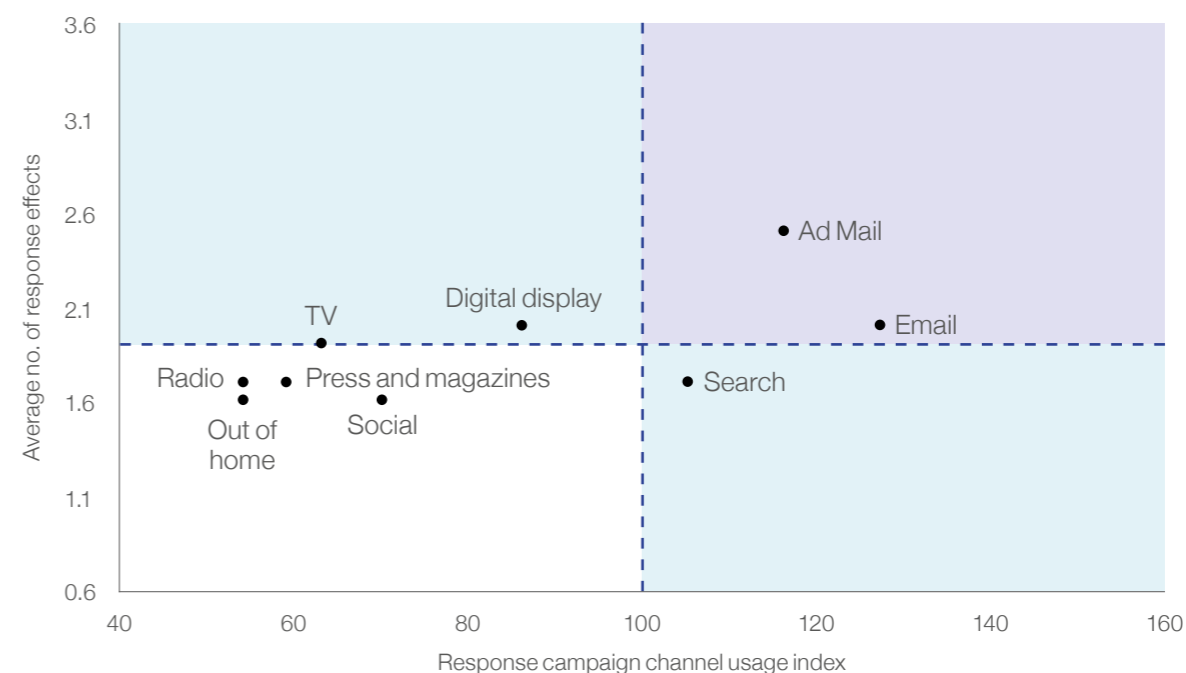
Full effect measurement: Is brand and response thinking too siloed?

Correctly attributing brand and response effects to different media channels in a complex world is a challenge in which many marketers and measurement practitioners fall short. This, in turn, raises the question of whether we are still too siloed in our thinking about brand and response marketing. Is it still relevant to separate channels according to brand and response objectives, or is it more likely that a combination of channels can shift the dial on both?

According to the DMA's Intelligent Marketing Databank, Ad Mail (covering direct mail and door drops) and email are the most likely channels to be deployed in a direct response campaign. Both channels are also above-average response performers, with campaigns that include an element of Ad Mail being the most effective overall at driving response effects (see chart below).

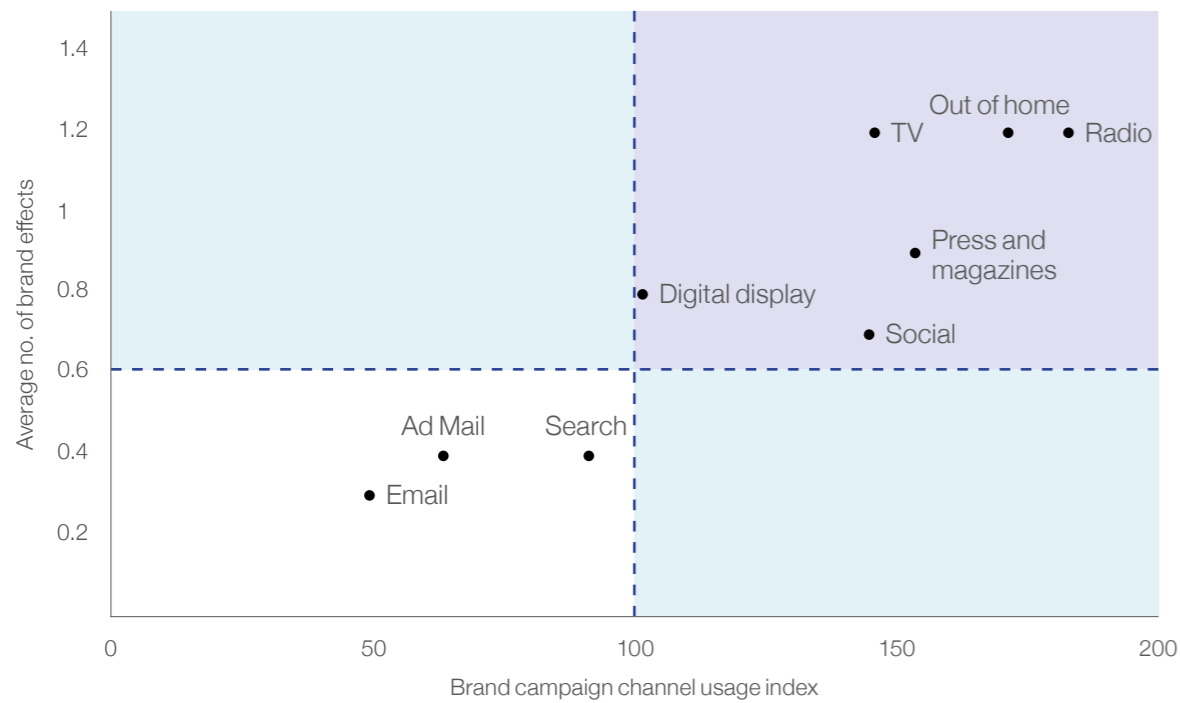
With a glut of traditional 'above-the-line' channels appearing in the bottom left quadrant of the chart below (i.e., indicating that they are low response drivers and less likely to be used in response campaigns) a picture of siloed thinking does seem to emerge. However, at the same time TV is generating nearly the same number of response effects per campaign as email but is apparently under-utilised in driving response. Do planners need to re-evaluate their perceptions about the strengths of each channel?

Response effects vs usage of channels in response campaigns



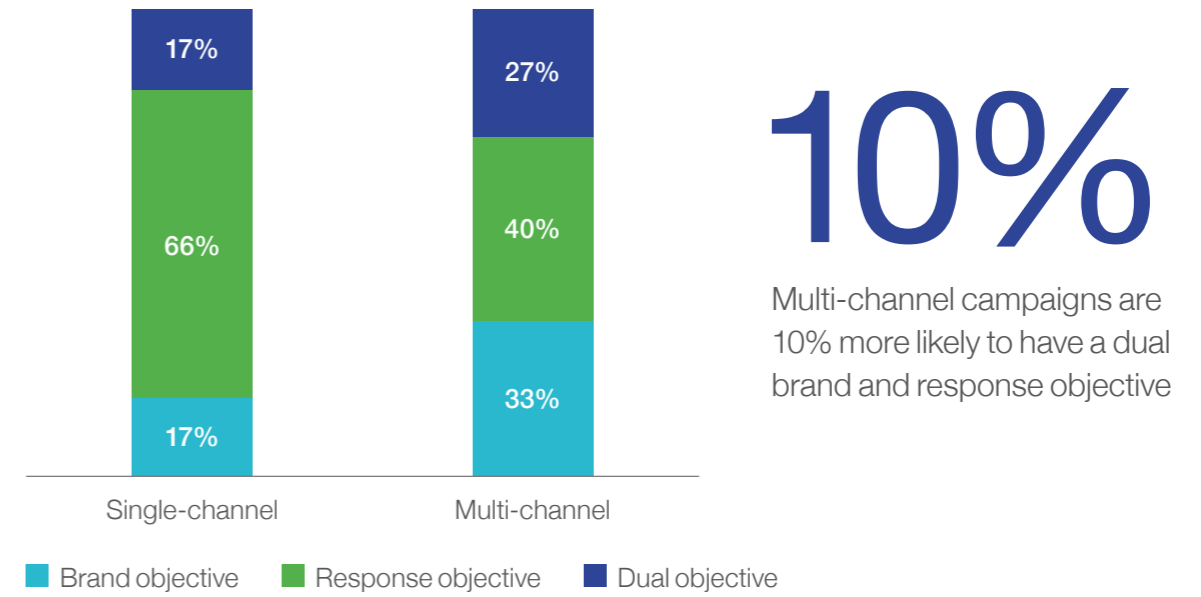
Analysing the same data according to brand effects and brand campaign usage creates an almost inverse of the response-focused chart. The traditional 'above-the-line' channels now appear in the top right quadrant (i.e., they are more likely than average to be employed in a brand campaign and are generating an above-average number of brand effects) while email, Ad Mail and search appear in the bottom left. How much of this is a self-fulfilling prophecy though? Data from JICMAIL proves the reach, frequency and impression multiplier of Ad Mail (a cornerstone of brand campaign planning), yet if no test and learn is happening with the mail channel in the brand space, then how are its brand effects ever to be truly realised?

Brand effects vs usage of channels in brand campaigns

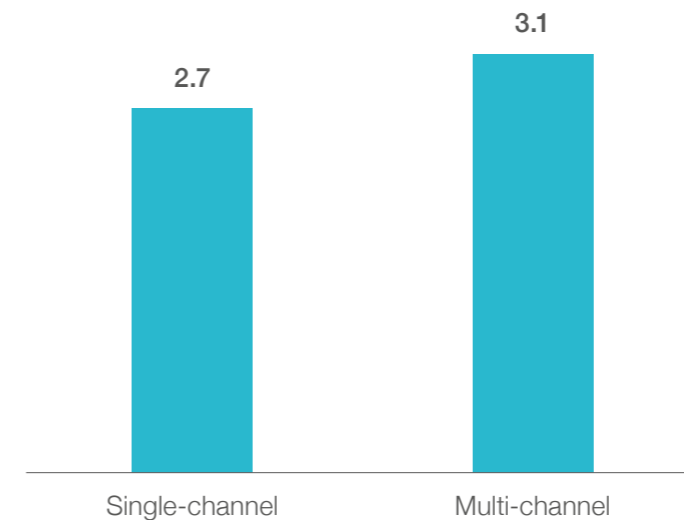


A firm data point that indicates the benefits of breaking down the silos between brand and response activity, confirms the effectiveness of a dual brand and response objective with the same campaign. This effect is strongest for multi-channel campaigns: Multi-channel campaigns are 10% more likely to have a dual brand and response objective, and furthermore, dual-objective multi-channel campaigns generate more effects than their single-channel counterparts.

Campaign objectives for multi vs single channel campaigns



Number of effects generated by dual-objective campaigns



The roundtable attendees discussed a number of reasons why marketing and measurement silos exist, along with potential solutions for improving best practice measurement in this space:

1. **Channel silos:** Too many businesses have marketing teams which are siloed by channel. This often has the effect of focusing measurement on paid media, but not owned media. Business Mail (transactional customer mail that includes bills, statements, loyalty reward schemes and product notifications) was cited as a case in point: it is one of the most commercially effective mail channels, but its effects beyond customer engagement or compliance are often ignored. Some pieces of the marketing puzzle are simply not being measured.
2. **Silos create self-interest:** A team incentivised to focus on reach in an effort to build brand awareness may well work to the detriment of other channels. A direct response team's activity may well damage brand-building efforts if not planned in a joined-up way. Only a holistic measurement approach that accounts for everything that is going on will accurately break down the relative performance of these silos. However, getting all of the requisite data into one place is hard, with the CRM team not talking to the marketing team, the marketing team not talking to the product team, etc.
3. **Sales funnel maturity:** Silos often exist due to the nature of how mature a business is and the industry sector in which it operates. Where you spend the next £50k marketing budget for a large established telecoms brand might be very different to where you spend that money for a small digital start-up. Some organisations have a simpler sales funnel, while others have a much more complex customer journey that focuses on long-term relationships through brand building and customer acquisitions, or which are only captured by third parties (e.g., retailers rather than brand owners are often the holders of that data in the FMCG space).
4. **Perfect measurement is hard:** If we are to break down how to attribute success between brand and direct response spend, marketers and measurement practitioners have to start by doing things piece by piece – assessing each available data point one at a time and slowly building up a picture of effectiveness as they become more familiar with the business.
5. **Measurement automation:** Marketing automation platforms are changing the way marketing metrics are looked at for the better. Single unified dashboards are providing a clearer view of campaign impact across different channels, highlighting which channels have distinct strengths and where in the marketing mix. This enables marketers to make sense of the data and join the dots on the journey towards true business outcomes. As always though, these platforms will be constrained by the quality of the data that goes into them.
6. **Lack of case studies:** The marketing industry has a responsibility to undertake more role-modelling by producing case studies on how to measure performance effectively. This will break down the barriers between siloed brand and response teams, enabling them to paint a true picture of effectiveness.

Views from the roundtable

“In our organisation marketing and 1-to-1 are viewed separately, but in reality, our existing customers are going to see our mass marketing too. We know from research that exposure across multiple channels increases the likelihood of the purchase of an additional product, yet our attribution approaches are separate. Having said that our MMM is an extremely effective tool in combating this across marketing channels, it provides a channel-agnostic view that enables us to plan a campaign as a whole. The next step is channel agnostic measurement.”

Sophia Walmsley, Santander

Key implications

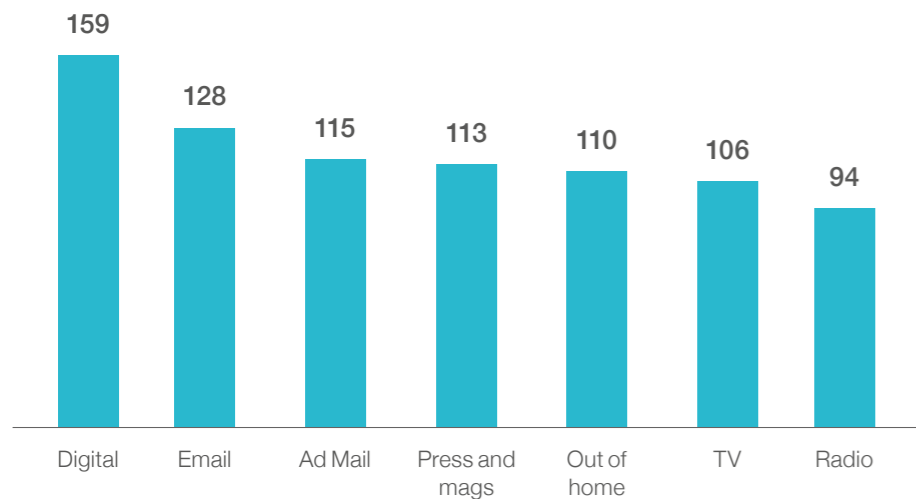
1.	There is a pronounced difference in the usage of different channels in brand and response campaigns. Ad Mail excels as the top response platform, while TV, Outdoor and Radio are top brand performers.	Too many marketing teams are still siloed by channel, and with each channel targeted according to different brand and response goals, these silos create self-interest detrimental to business performance. Agencies working with new and existing clients need to lead on a rigorous onboarding process that really helps clients break down these silos by focusing on their overall business priorities.
2.	There is evidence that multi-channel campaigns can be highly effective at performing a dual brand and response function.	Perfect measurement is hard, particularly when it comes to measuring the combined effects of brand and response campaigns, who will often have been measured using entirely different methodologies. The industry should not let imperfect measurement stand in the way of progress, however. A step-by-step approach to revealing each piece of the marketing puzzle is the best way forward.
3.	Marketing automation and joined-up business reporting.	If automated campaign reporting is more prevalent than it used to be, what lessons can we learn from this in terms of how to communicate campaign learnings to the business? Automated dashboards and joined-up reporting with high-quality insights disseminated at speed will revolutionise the application of effectiveness measurement to the marketing cycle.

Real world test and learn: Are we better at testing some channels than others?

The term ‘test and learn’ has already appeared in the previous two chapters of this report. It describes the process by which organisational commitment is made to the measurement of marketing effectiveness, and the subsequent process by which these learnings are fed back into future campaign plans. Without an effective process of test and learn in place, planners are effectively flying blind when it comes to assessing what drives campaign performance.

The DMA’s Intelligent Marketing Databank reveals that digital display, in particular, suffers from a surplus of metrics used to articulate campaign effectiveness in test and learn scenarios: 159 were used in total. TV and radio on the other hand used a relatively more condensed and therefore more manageable number of metrics – an important consideration when making sense of test and learn frameworks.

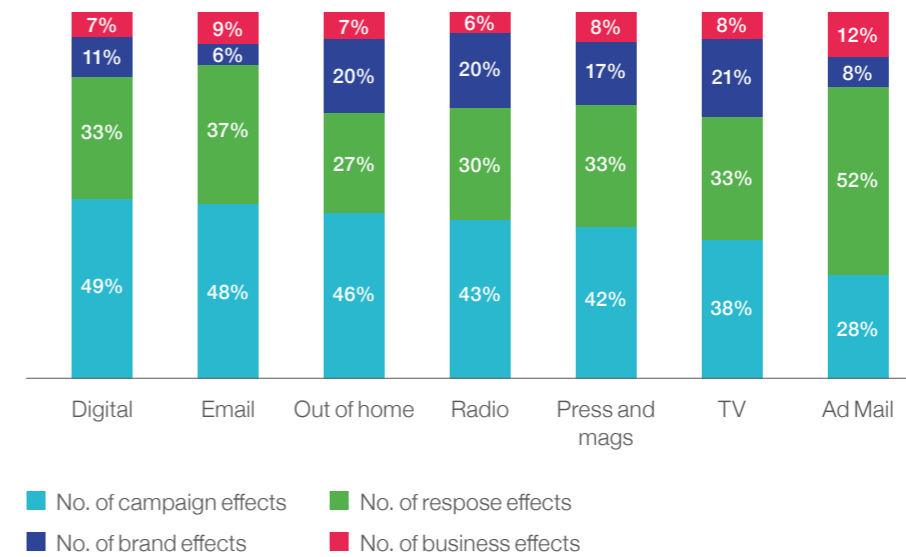
Number of metrics used to measure effectiveness by campaigns including the following channels



The issues with the measurement of digital display are further compounded when considering the types of metrics being used to articulate campaign effectiveness. Nearly half of the metrics used for digital are less meaningful campaign delivery and digital vanity metrics – metrics that tell us nothing of true campaign impact and only cloud the learnings we are feeding back into future activity.

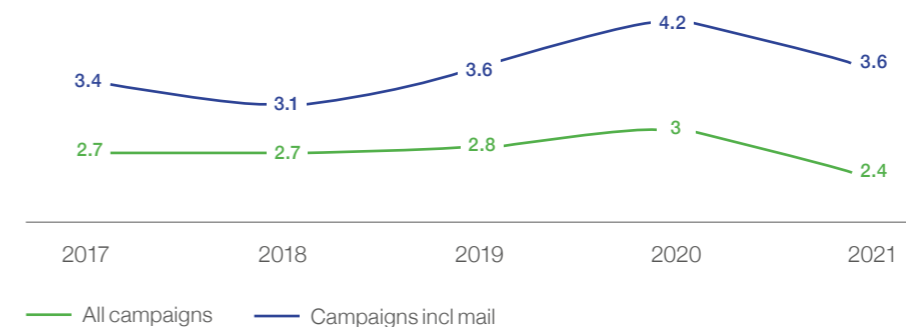
Campaigns that include Ad Mail are producing the most coherent measurement plans. Only 28% of the measures being used relate to campaign delivery, and 72% relate to true measures of response, brand and business effectiveness. While this is likely down to both a lack of delivery metrics in this space, and more rigorous measurement best practice, it is an important reality of the mail channel worth acknowledging.

Percentage of effects recorded for campaigns that include the following channels...



As hypothesised in the first chapter of this report, sub-par measurement will lead to sub-par marketing performance. As a channel which is more likely to be focusing on the correct marketing measures, it is telling that campaigns that include Ad Mail outperform the average campaign and have not experienced the same magnitude of effectiveness drop-off in the late pandemic phase.

Total number of effects over time



The roundtable attendees discussed some challenges and themes related to best practice when testing and learning:

1. **We live in an increasingly multi-channel world:** The average marketer might have worked across only three channels in the past, but now has to plan across something closer to ten. At the same time, marketing teams are getting smaller. It is hard to build rigorous testing frameworks in these conditions – i.e., where resource and expertise are being spread more thinly across multiple channels.
2. **Preparation, thought and expertise:** Testing and learning requires preparation, thought and expertise – you can't just test after the campaign has been delivered. You need to know how to set up a test up front and this requires the type of expertise that is often not present in planning teams (for example, data scientists). Planning teams need to get comfortable engaging with the right types of experts to run these tests.
3. **Hesitant to reveal true effectiveness:** There is often nervousness among clients about revealing underperforming campaign elements in these tests. The industry needs to become comfortable having a conversation about where it is wasting money, and then feeding this back into the campaign decision-making process.
4. **De-risking testing is key to wider acceptance:** Rather than simply focusing on vague un-defined optimisation objectives, create real hypotheses, articulate what you expect to happen with the test and proceed accordingly. This is particularly important for franchise businesses where media costs (and measurement costs) are passed on to franchisees – they have to be made to see the value upside in test and learn. A water-tight business case is needed for testing.
5. **Retain measurement focus:** It is important to stay focused when testing and learning. Clients who try to learn too much at once and change too many campaign elements, often struggle to draw meaningful insight from their tests.
6. **Start small:** Incrementality testing by region was noted as a simple, cost-effective and highly robust methodology for test and learn, but one which was not nearly widespread enough in usage. Again, a lack of expertise in planning teams is an issue, but general awareness levels around the methodology do not help either. Channels that can be bought at a granular level – like Ad Mail – lend themselves much more readily to these types of tests than broader reach media – like TV.

Views from the roundtable

“We tend to do a lot more digital test and learn just because it's quicker to get a result and easier to deliver. It feels high risk testing some channels when so much of the business depends on it, so we try to do what we can to minimise that risk.”

Sandra Doyle, Specsavers

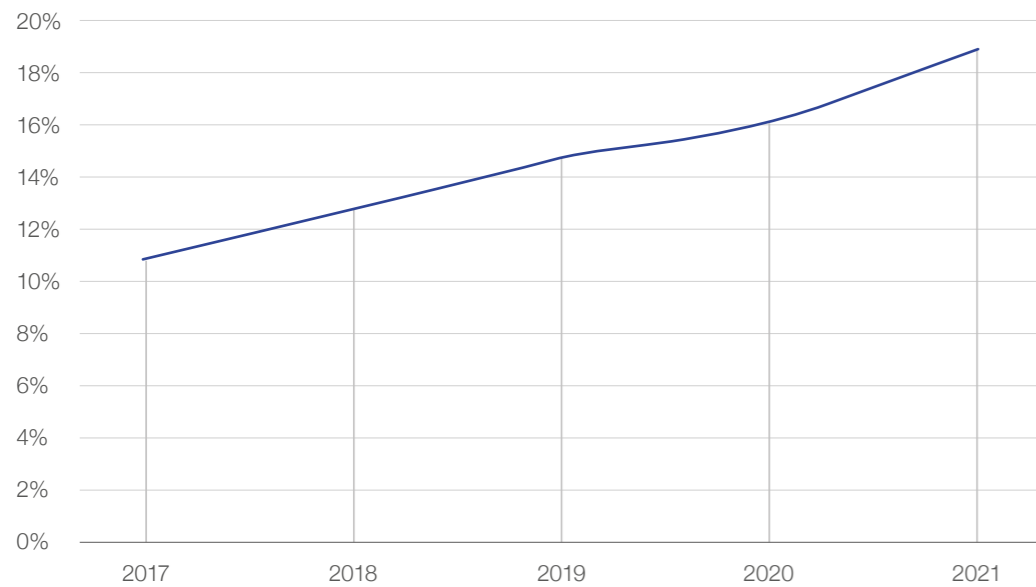
Key implications

1.	Test and learn depends on measuring not only the right metrics, but also the right <i>number</i> of metrics, pinning them to business outcomes and applying learnings to future activity.	While the immediacy and efficiency of digital media lends itself nicely to scalable test and learn, half of the metrics used to measure digital are less meaningful delivery metrics, compared to just 28% for Ad Mail. Planners and practitioners must focus their test and learn efforts on the metrics that matter.
2.	Expertise, time, resource and preparation are needed for effective test and learn – but it should not be out of reach for any organisation.	Multi-channel is a double-edged sword: it creates a multiplier that boosts effectiveness, but at the same time a joined up picture of effectiveness gets harder to measure across multiple channels. As previously covered, breaking down the silos is key here.
3.	De-risking test and learn is key to building the business case for measurement.	Advertisers and brands need to get comfortable with the degree of introspection and scrutiny they are placing on their own activity. They must be comfortable with the discomfort this can cause internally – challenging long-held notions about what is and isn't working must be accompanied by quantifiable revenue upsides.

'Phygital' experiences: Have blended experiences made measurement harder?

The reporting of digital effects has risen steadily over the last half-decade. Data from the DMA Intelligent Marketing Databank shows that in 2017, 10% of all campaign effects were accounted for by digital-specific metrics – a number that had nearly doubled by 2021. This shift has been accelerated by the pandemic, and in a trend that WARC and Marketreachⁱⁱⁱ refer to as 'Phygital Marketing' the boundaries between physical and digital brand experiences have become more blurred than ever, even while consumers do not (and don't want to) live in a completely digital world.

Percentage of campaign effects accounted for by digital-specific metrics



ⁱⁱⁱhttps://www.marketreach.co.uk/sites/default/files/insights/WARC_Direct_Mail_Effectiveness_Report.pdf

As far as the mail channel is concerned, data from JICMAIL demonstrates this trend well. The chart below reveals that during the periods of national lockdown, footfall in stores prompted by mail naturally fell away, while web visits shot upwards. When the country opened up again, footfall rebounded, yet at the same time, the digital activity prompted by mail was sustained at a level way above that seen pre-pandemic. Mail now drives significant physical *and* digital brand experiences.

Given that the pandemic has not only accelerated digital transformation, but deepened the relationships between physical and digital experiences, the question remains as to whether this has made the measurement practitioner's job easier or more difficult.

Physical vs digital commercial actions (% of all mail items)



While the challenges of multi-channel measurement and silos between different channels might point to further measurement channels in a 'phygital' world, roundtable attendees identified some instances where the blend of physical and digital actions can aid measurement. As always though, measuring the incremental impact of digital upon physical, and vice versa, is key:

- 1. QR codes provide 'phygital' experiences:** Anecdotally up to half the mailbag seems to contain a QR code these days. While some simply point to a brand URL, it is those QR codes that offer a value-add in terms of utility that really take advantage of the opportunity. A retailer using a QR code to take customers straight to an online check-out page was cited as one example. In this instance, the sales effect is entirely attributable to the mail piece and, overall, its inclusion enhances the measurement of campaign effectiveness.
- 2. New technologies:** Voice activation and the use of augmented reality technologies were also given as examples of 'physical' actions being linked to digital outcomes. In both instances, again, a clear attributable link can be established much more readily than an offline to offline exposure and outcome.
- 3. Importance of incremental impact:** The roundtable attendees were keen to stress that with digital purchase fulfilment and offline purchase fulfilment now often as vital as each other for many advertisers, it is more important than ever to measure the incremental impact of digital vs offline. Panellists dismissed the idea that digital spend could have value even if the incremental impact could not be proven, due to its 'sign-posting' effect – i.e., getting an in-market consumer closer to the point of purchase more efficiently. Similar criticisms were aimed at branded search – i.e., paying for own-branded search terms. Incremental effectiveness was seen as an essential piece of the measurement jigsaw in a blended physical and digital world.
- 4. Benefits of first-party data:** The high incidence of first party-data in the world of direct mail was seen as a huge positive for the channel – enabling measurement practitioners to create the control and exposed cells so vital for testing incrementality much more easily than other channels would allow.
- 5. Constraints of first-party data:** One advertiser roundtable attendee did, however, council caution with the enthusiasm for first-party data when testing. While the theory is sound, often the practitioner will be constrained by what first-party data has actually been collected. While first-party data is a vital aspiration for more effective marketing and measurement, it should not be seen as the only route to plugging the measurement gap.

QR codes offer an entirely attributable link to digital effects



Scan the QR code using the camera on your phone to access more content.

Views from the roundtable

“Something that we fall flat on is full effect measurement. You have to have three different pieces of information in a measurement framework: understanding immediate, long-term and longer-term impact and the incrementality of your spend at each of those points.”

George Gloyn, MediaCom

Key implications

1.	Digital effect reporting is on the rise. 10% of the metrics in the Intelligent Marketing Databank were digital-specific in 2017. This has nearly doubled five years later.	With digital effect reporting on the rise, it is more important than ever before for offline channels to have their digital effects properly attributed. – i.e., to avoid the pitfalls of last-click attribution. QR codes were given as one example of how such a link can be made between the physical and digital, but industry currencies like JICMAIL also look to create measurable links between the two.
2.	JICMAIL data shows that the mail channel now drives significant volumes of digital traffic and store footfall.	As physical and digital experiences blend for brands, measuring the incremental impact of each is vital. The ability to quantify true incrementality must be the aspiration of all full-effect measurement frameworks.
3.	First-party data as a route to closing the gaps in a 'phygital' world.	Granular first-party data enables far richer and more robust incrementality testing. The quality of first-party data varies by channel and advertiser, however.

Multi-touchpoint outcomes: Does the multi-channel multiplier really exist?

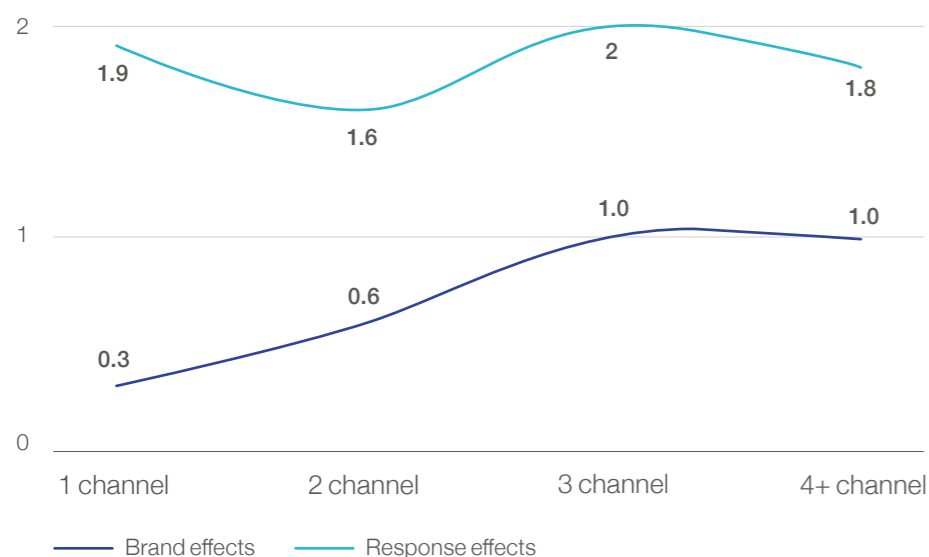
Inclusive, open targeted multi-channel planning which harnesses significant multiplier effects is increasingly important in delivering effective outcomes for brands. However, while multi-channel planning is often regarded as the panacea for campaign effectiveness, there is some suggestion from the DMA's Intelligent Marketing Databank that it might matter more for building brand objectives than driving more immediate response.

Brand effects are accumulated as more channels are added to the media schedule. While there is a likely frequency effect at play, the role that different media play in priming audiences in different contexts and at different times of day, results in a combined effect that is more likely to shift the dial on brand metrics like awareness, consideration and brand perceptions.

For response campaigns, the pattern is less clear. Simply accumulating channels seems to have no discernible impact on the average number of effects generated. Response campaigns are almost three times more likely than brand campaigns to target existing customers. There are only so many ways that a business can talk to the same person (email, advertising mail, and SMS most commonly) and expect to illicit increasing amounts of response.

Brand campaigns work differently, however. They seek to embed messages, perceptions, and suggested behaviour changes that benefit from a reminder across multiple channels.

Brand and response effects by number of channels
(Average number of effects)



The roundtable attendees discussed a number of factors that would enhance marketers' understanding of the benefits of a multichannel approach and why this might differ for different campaign strategies:

1. 'Touchpoints' rather than 'channels':

It was felt that the use of the word 'channel' in 'multi-channel' did not really do justice to the benefits of such an approach. 'Touchpoints' rather than 'channels' was felt to be more suitable language and helps explain how different contexts, locations, times of day and media exposure opportunities can all be combined to create campaign effectiveness that is greater than the sum of its individual parts.

2. Understand the role of different touchpoints:

The media industry should be doing more to understand the role of each of these different touchpoints – e.g., getting to grips with planning tools like the IPA TouchPoints survey, commissioning bespoke research, producing test and learn toolkits, and exploring new ways of linking and enhancing existing media data sets. It has long been acknowledged that the customer journey is not some simple linear process. Having brand and response siloed and their roles in this journey separated out may cause marketers to miss some of the nuances around how campaigns work.

3. Brand building is cumulative:

Despite the above, the fact that multi-channel matters less for response than brand building made intuitive sense to roundtable attendees. Brand building is cumulative, while often a response will only happen to a specific performance campaign once per person. As you hone in on existing customers or in-market prospects, your choice of channels naturally becomes more restricted. However, while multi-channel might be less important for direct response, a multi-channel approach doesn't negate response effects.

4. Avoid siloed thinking:

Attendees again counselled caution when it comes to siloed brand vs response thinking. Brand-focused TV campaigns are a huge driver of sales, for example, while a physical follow-up to a brand campaign with a mail piece was seen to provide a significant boost to response. At the same time, mail has longevity and itself presents in-home brand touchpoints when it is placed on the coffee table or pinned to the fridge – creating the types of campaign exposures that are crucial to brand campaign planning.

Views from the roundtable

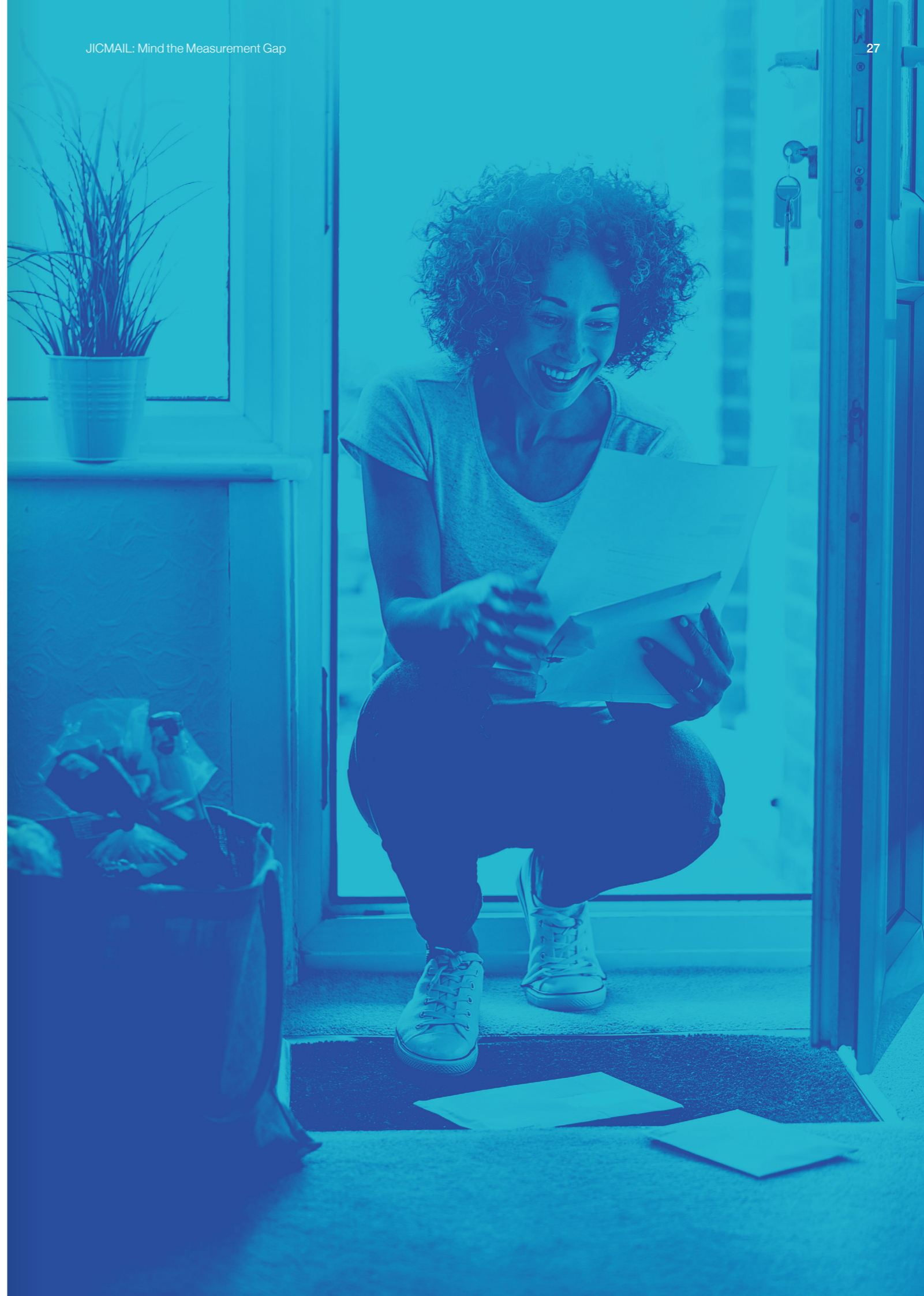
“I think that we can do a lot more as an industry to truly understand how today’s multiplicity of consumer touchpoints all interrelate and impact us and so understand the new world we all live in. We are touched by so much interaction all the time – reflecting ‘the messy middle’ and the dynamic and non-linear nature of today’s customer journeys. More investigation, testing and industry wide collaboration to understand this better can only be good for us all.”

Stephen Maher, MBAStack

Key implications

1.	Marketers and measurement practitioners need to think in terms of consumer ‘touchpoints’ not ‘channels.’	A channel-lead mindset, even in a multi-channel world, still leads to the type of siloed thinking that only hinders good measurement. The shift to ‘touchpoint-lead’ thinking is far more channel-neutral and therefore more likely to result in full effect measurement.
2.	The DMA Intelligent Marketing Databank shows that while brand effects build across an increased number of channels, response effects do not. They start high with one channel and remain that way.	Brand building is a cumulative process, with each exposure nudging consumers towards an enhanced emotional relationship with a brand. Response activity is more binary – once someone has responded they are unlikely to do so again to the same activity.
3.	Never discount the brand or response effects of above and below-the-line channels.	Traditional brand-building channels also have a response effect and traditional direct response channels will have a brand effect (e.g., as proven with Ad Mail by WARC and Royal Mail Marketreach*).

*<https://www.marketreach.co.uk/resource/direct-mail-effectiveness>



The new value metric: How important is attention?

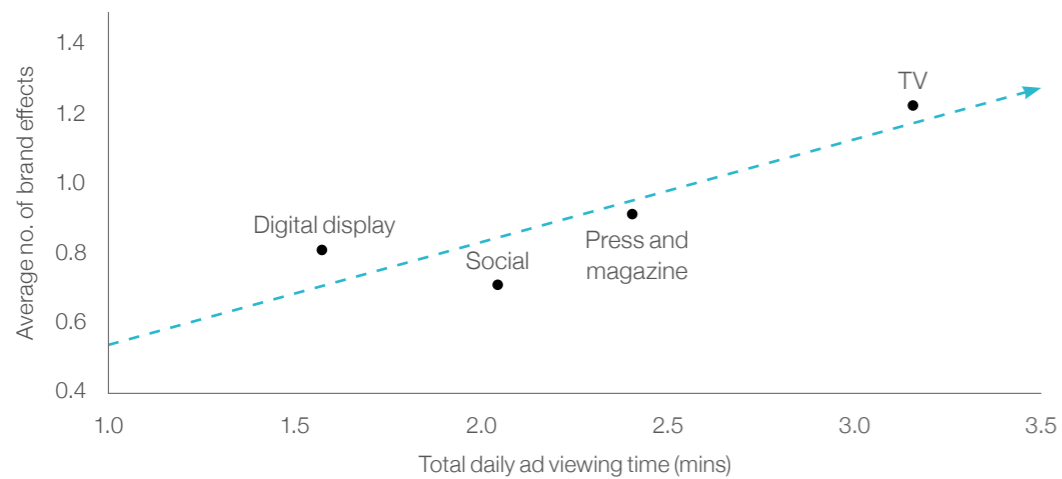
2022 is set to be a defining year for the measurement of media and advertising attention. The focus on the concept of user/audience/reader attention as a media planning variable has accelerated with the formation of the attention council, the publication of ‘To ESOV and beyond^{iv}’ and news that the major media agency networks^v are now planning to trade on attention-based currencies.

Attention has become a third variable, alongside reach and frequency, that planners are increasingly giving careful consideration to. The field of attention measurement acknowledges that not all impressions are equal – both within channels, but particularly between different media channels and platforms. This is particularly the case when an ‘in view’ metric of attention is employed – i.e., one which quantifies whether someone is directly fixated on an ad, rather than whether that ad simply appears on screen/within the media in the peripheral vision.

So, does attention really matter when it comes to shifting the dial on campaign effectiveness?

The chart below maps attention as measured by Ebiquity and Lumen against channel-specific brand effectiveness scores from the DMA’s Intelligent Marketing Databank. Attention data is currently only available across a limited number of channels hence the limited number of variables on display, but even within this smaller data set a linear pattern emerges that highlights the importance of attention in brand campaign planning.

Brand effects vs ad attention



Source (Ad Viewing data): Ebiquity – The Challenge of Attention. Note: Combined average created for press and magazine ad viewing time. Digital display used as proxy for Functional Internet in Ebiquity report

^{iv}<https://www.warc.com/newsandopinion/opinion/to-esov-and-beyond/en-gb/4298>

^v<https://www.mediapost.com/publications/article/367895/dentsu-creates-attention-metric-for-media-planni.html>

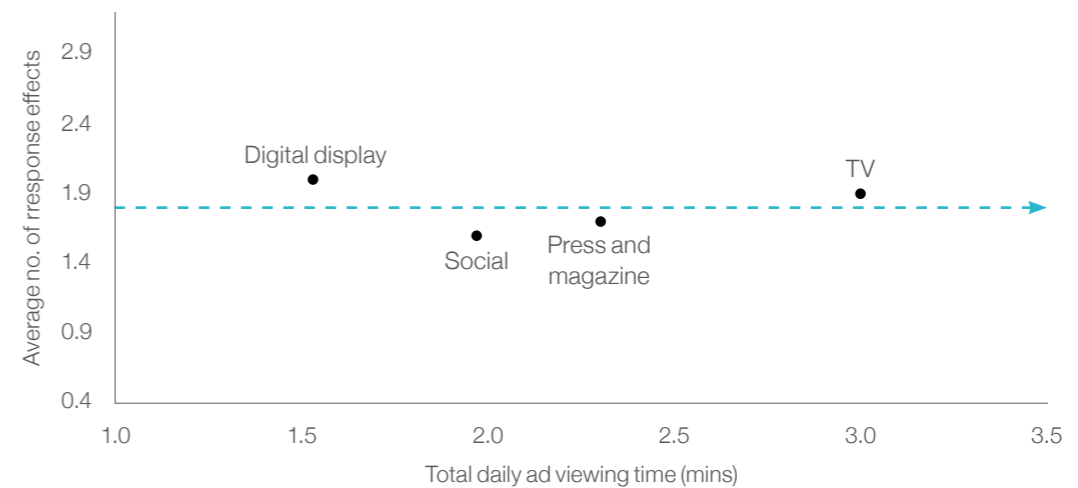
TV accounts for the largest amount of daily ad viewing time and, at the same time, campaigns that include TV are the most effective at driving brand impact. Press and magazines are also high performers while the digital channels for ad attention are the lowest (given the huge amount of ad clutter online) and are the lowest brand performers on this chart. Simply put, when it comes to brand campaign planning, getting people to directly view your ads for longer really matters.

For response campaigns, the pattern is less clear – with no direct linear pattern observable. However, it should be noted that we don’t currently have attention data for the top performing response channels of Ad Mail, email and search. This is a situation that should, in part, be remedied at the conclusion of JICMAIL’s attention measurement pilot study for the mail channel in Autumn 2022.

Campaigns that include digital display, for example, drive as many response effects as campaigns that include TV, yet they command half the amount of ad attention. With response campaigns tasked with the simple job of eliciting a sale or action as quickly as possible, without the need for subtlety or complex messaging that seeks to create deep emotional connections (of the sort that brand campaigns do), there is evidence that attention matters less in response marketing.

Although it should be noted that this is different from saying response ads don’t need to be noticed – clearly having an eye-catching ad matters – but rather that prolonged exposure may not be necessary for driving a short-term response.

Response effects vs ad attention



Source (Ad Viewing data): Ebiquity – The Challenge of Attention. Note: Combined average created for press and magazine ad viewing time. Digital display used as proxy for Functional Internet in Ebiquity report

The topic of attention deserves a roundtable of its own, but at a top-line level, roundtable attendees offered a range of opinions on the increased usage of attention as a planning and measurement currency:

1. **Consider value:** The brand vs response dynamic for attention is likely explained by the value and complexity of products being advertised. Ads for low value/low consideration products are unlikely to require as much attention to convey their key benefits and may simply be the focus of relatively straightforward direct response activity. More complex products and services with high consideration may well require more attention to convey their key messaging and may be more likely to be bigger brand spenders.
2. **Adding value to reach metrics:** Attention was seen as adding a layer of value to reach metrics, and in the digital display channel provides a further improvement to some of the hygiene factors that the industry currently uses (e.g., viewability). For the 99% who might not be immediately converting following ad exposure (in the case of short-term response activity), attention applies some idea of the value to the remaining exposures.
3. **Too many metrics:** Despite this, roundtable attendees also expressed reservations about introducing yet another metric into an already crowded measurement landscape. If attention matters because it is linked to higher ad effectiveness, then isn't it just an unnecessary step on the road to business impact? Through JICMAIL, for example, planners can already quantify over 10 commercial actions taken following mail exposure, arguably negating the need for a proxy metric like attention.
4. **Mail garners high attention:** Mail was anecdotally still regarded as a likely high attention channel, due to its tactile nature and longevity in the home. JICMAIL are currently piloting the measurement of mail attention on their nationally representative panel – the results of which will be assessed in Autumn 2022.
5. **Measuring the impact of creative:** Attention was seen to have value in the campaign planning and campaign measurement space, but with regards to the latter was particularly seen to be a useful, potentially scalable way of measuring the impact of creative – a variable which many attendees feel is overlooked in campaign measurement solutions which take a channel-centric approach to effectiveness insights.

What our panel said

“What do we mean by attention? Everyone is talking about it, everyone wants to sell it, everyone thinks they want to buy it. But really what does attention mean? It is multi-layered. Mail has a tangible quality that plays a role in building up attention.”

Clare O'Brien, ISBA

Key implications

1.	Data from the DMA's Intelligent Marketing Databank and Ebiquity suggests that ad attention might matter more in the brand-building space than in the response world.	However, a crucial piece of the jigsaw is missing in this analysis: that is valid attention data for the highest performing response driving channel: Ad Mail. JICMAIL are undertaking a mail attention pilot, the results of which will be assessed in Autumn 2022.
2.	Do we need another proxy for ad effectiveness?	Does attention only matter where commercial effects cannot be appropriately planned against? Few industry currencies and planning systems enable practitioners to plan on outcomes. JICMAIL is a notable exception – providing insight into mail's impact on twelve commercial outcomes for brands.
3.	Is attention a debate that channels and agencies care more about than advertisers?	The link back to measuring business outcomes is a vital consideration here. Businesses are here to sell products and services, not buy attention. If a demonstrable link can be made between these outcomes and ad attention, then it is a reasonable planning avenue to pursue. However, as a new planning metric, the onus is on media channels and agencies to provide the proof.

Top tips for Minding the Measurement Gap

Roundtable attendees were asked to share their top tips for the measurement of campaign effectiveness. While this guide is by no means a definitive checklist, it does provide highly relevant advice from a group of experts who have spent most of their careers grappling with how to assign incremental impact to different marketing channels in an increasingly complex world:

- 1 Planning:** Plan your campaign measurement upfront and make it link back to business objectives as much as possible. Every time you create a campaign plan, put a measurement framework in place. Every time you put a measurement framework in place, put a test and learn framework in place.
- 2 Client communication:** Agencies need to ask new clients what existing measurement frameworks they are using, and crucially what their most important business KPIs are – everything should cascade down from there.
- 3 Joined-up thinking:** Channels, campaigns, objectives and metrics shouldn't sit in silos. Siloed thinking incentivises counter-productive business behaviour. Marketing automation might help here, but business leaders need to take responsibility for breaking down these silos through a shared vision of marketing effectiveness.
- 4 No silver bullets:** We should not be afraid to have multiple measurement methodologies in play and work out how to make them sync together. There is no magic measurement silver bullet, and they won't always sync together perfectly, but having one team/person across all of these elements will help there be a better chance of doing so than a more fragmented approach. Don't let perfect be the enemy of good.
- 5 Measurement in the real world:** While the entire marketing industry must strive to close the measurement gap, marketers in agencies have to put their real-world hat on when talking to advertisers. There are no perfect solutions, but by being honest about the various pros and cons of each solution, this will give marketers more confidence in measurement frameworks.
- 6 Multi-channel gaps:** Understanding each of the channels and how they work together is key. Breaking down existing myths and pre-conceptions around the role of different channels on the path to purchase is an important challenge to address.
- 7 Less is more:** 170 different campaign metrics in play creates an incredibly complicated measurement landscape. There must be transparency between agency and advertiser about which are the most appropriate metrics to enable the right decision-making and true performance comparability across channels.
- 8 A hierarchy of measurement:** Marketers must reinforce a hierarchy of metrics from short-term actionable ones that drive in-flight optimisation, to long-term return on investment and brand building. Each one has an equally important place, but ongoing education is required to help organisations understand which metric to use and when.
- 9 Focus on the business:** Always have an eye on business objectives. The other elements (like brand and response effects) can just fit in around them.
- 10 Strip away all terminology:** Advertisers should not allow the marketing industry to drive them into silos about what does and doesn't work when it comes to driving business performance.

Accurately measuring success is an ongoing challenge across all media and ensuring marketers have the right frameworks and tools to prove the value of what they do is key. The DMA recently launched the Marketing Measurement Framework 101^{vi}, which provides best-practice guidance on how to measure business outcomes, not just marketing metrics.

“Breaking down existing myths and pre-conceptions around the role of different channels on the path to purchase is an important challenge to address.”

^{vi}<https://dma.org.uk/article/marketing-measurement-framework-101>

DMA Intelligent Marketing Databank methodology

Data was sourced from the over 1,000 entries to the DMA Awards, which have been condensed into a database of 852 unique marketing campaigns. Some data is derived from the self-declared information provided in the award entries themselves, while additional tags have been created to add further depth to the databank. Further details on this can be found in the Meaningful Marketing Measurement 2022 report*.

The data was collected, collated, and analysed by the DMA Insight department in partnership with Data Stories Consulting. The report was written and designed by the DMA Insight department and Data Stories Consulting. The DMA, Data Stories Consulting and JICMAIL reviewed the findings to ensure relevance to the current state of the industry. Unless referenced, all data included in this report is taken from this survey.

If you have any questions about the methodology used in the report, you can contact the DMA's research team via email: research@dma.org.uk

*<https://dma.org.uk/research/meaningful-marketing-measurement-2022>

About JICMAIL

JICMAIL is the Joint Industry Currency for Mail, measuring how consumers interact with and respond to Direct Mail, Door Drops and Business Mail.

JICMAIL data is gathered from a panel of one thousand households a month. The mail activity of every household member is tracked using a diary based app. Every mail item they receive over the course of a week is captured, and everything they do with that mail item over the course of a month is recorded.

JICMAIL data is used by advertisers, agencies, printers, mailing houses and mail sell side organisations to demonstrate the value of mail, plan more efficient and effective mail campaigns, track mail performance and provide detailed competitor insight.

JICMAIL is a Joint Industry Currency – an independent organisation with a board comprising both the buy-side and sell-side of the mail channel.

Key JICMAIL reporting metrics include:

Frequency of Interaction / Exposure: The number of times a mail piece is interacted with over the course of a month, or how often the average person interacts with their mail.

Item Reach: The number of people in a household who are exposed / interact with a mail item.

Lifespan: The number of days a mail item is in the home before it is thrown or filed away.

To find out more about how to access JICMAIL data, please visit

<https://www.jicmail.org.uk/about/how-to-access/>

About the DMA

The Data & Marketing Association (DMA) comprises the DMA, Institute of Data & Marketing (IDM) and DMA Talent.

We seek to guide and inspire industry leaders; to advance careers; and to nurture the next generation of aspiring marketers.

We champion the way things should be done, through a rich fusion of technology, diverse talent, creativity, insight – underpinned by our customer-focused principles.

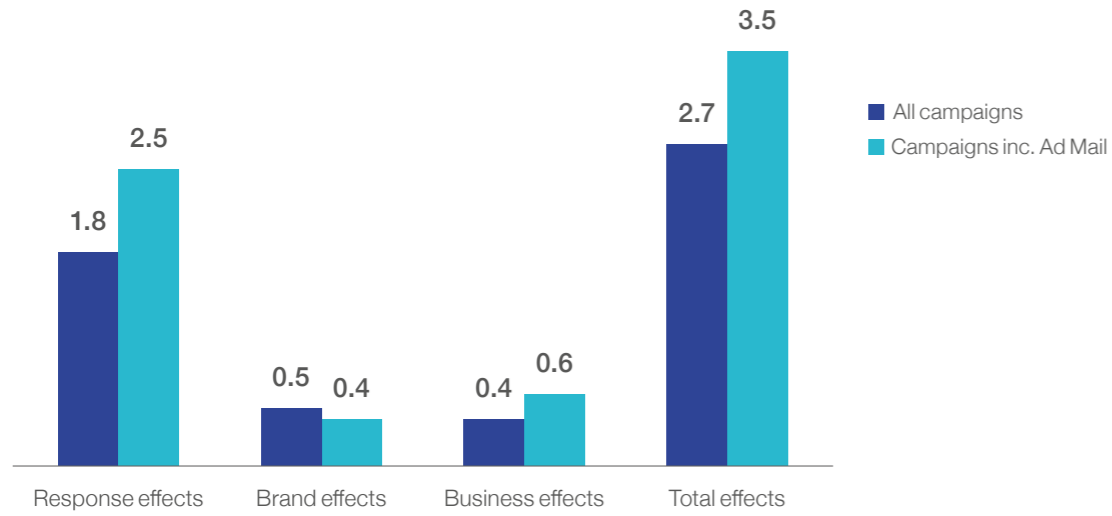
We set the standards marketers must meet in order to thrive, representing over 1,000 members drawn from the UK's data and marketing landscape.

By working responsibly, sustainably and creatively, together we will drive the data and marketing industry forward to meet the needs of people today and tomorrow.

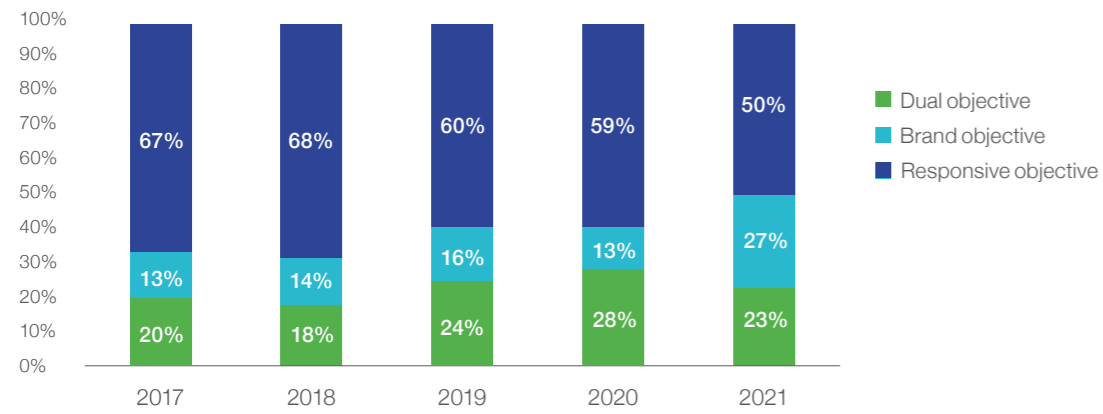
www.dma.org.uk

Appendix: Mail effectiveness insights from the Intelligent Marketing Databank

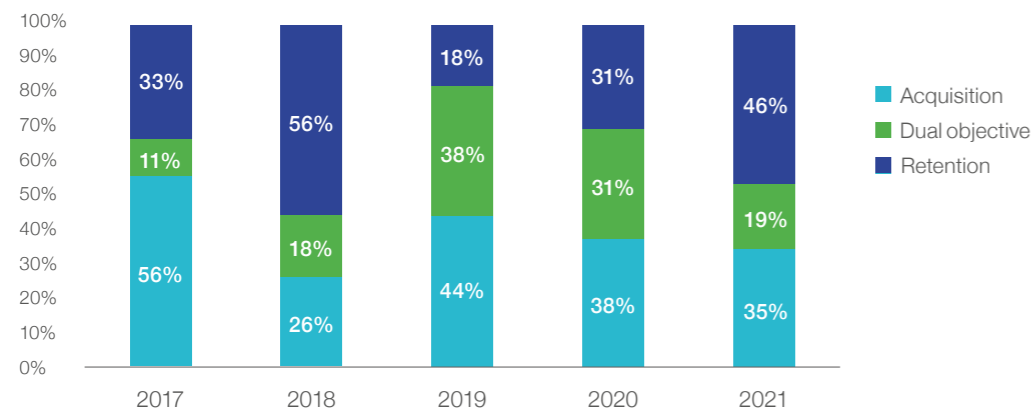
Total numbers of effects per campaign



Campaigns including mail: Brand vs response objectives



Campaigns including mail: Retention vs acquisition target



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