How do I: Monitor my marketing campaign?

Think you have a great campaign in the marketplace with no need to monitor its implementation? You could pay a heavy price for skipping straight to evaluation – monitoring what is actually happening in the market versus what you originally planned, can provide invaluable information with which to increase the effectiveness of your activity, either within the current campaign or for the future. This guide will summarise the role of monitoring, how to plan it and the key techniques available.

It is easy to assume that the hard work is over once the campaign is finally launched into the marketplace. In fact, the next stage has just begun i.e. monitoring your campaign. Monitoring activity is a critical pre-requisite to evaluation. You have to understand what actually happened to be able to then assess the impact of the activity. ‘Plan’ and ‘actual’, for all sorts of reasons, do not always correlate.

Sloppy monitoring can lead to erroneous evaluation and missing the opportunity to rectify problems. For example, a premium branded producer plans to send a leaflet to one thousand affluent consumers across six postcodes. The distribution company gets two of the postcodes wrong and sends four hundred leaflets to heavily industrialised areas. It is critical to track the accuracy of targeting as, in this case, only six hundred reached the target market. Here accuracy would affect response levels and this could be wrongly attributed to poor communication or the value of the offer. In practical terms, monitoring the activity would also affect your payment to the distribution company who had made the mistake. Careful monitoring also gives you the opportunity to rectify or redirect activity during a campaign should this be necessary. For example, identifying poor distribution levels can often be rectified before major advertising funds are invested.

Don’t be tempted to view monitoring and evaluation as the same process. Monitoring is about understanding what has happened with your actual campaign i.e. planned versus actual activity. Evaluation is about understanding the impact that campaign has had in the marketplace (for more information on evaluation, see How do I: Evaluate the effect of my marketing spend?)

**BENEFITS**

Monitoring marketing activity provides a number of business benefits, including:

- Clear management and control of activity.
- Critical input to the evaluation process.
- A valuable audit of services supplied.

**GETTING STARTED**

**Start at the very beginning:** monitoring activity should be planned from the outset. Monitoring needs to be accommodated within the project plan in terms of time, resource and budget. Start by reviewing each key element of your marketing plan and asking some questions:

**What** elements can be monitored and with what degree of accuracy? Are these elements critical to the performance of the activity?

**How** will the activity be monitored e.g. can this be done internally, or will specialist services be required? Monitoring actual marketing spend versus the planned spend should be a relatively simple internal task which is built into a project plan as a matter of course. However, mystery shopping in stores (see below) will, generally, require specialist help and needs careful planning particularly in time and investment.

**Who** will be responsible for monitoring the activity? Clearly assign this responsibility at the start to ensure this task is being managed within the overall process.
When will the monitoring results be reviewed? This may be a single point in time e.g. a review of your television media campaign or on-going e.g. weekly merchandising reports of in-store activity (see below).

METHODS OF MONITORING

The method of monitoring you use will depend on the activity and what needs to be reported. Focus on elements which can be monitored with accuracy and which are materially important to the impact of the activity. Monitoring methods within the key areas of marketing include:

1. Advertising: the effect of an advertising campaign depends on the advert itself and the ability to reach the right target audience with that advert. The two key elements to monitor are therefore the creative and the media.

Monitoring the advertising creative can be done by using either quantitative or qualitative research. Quantitative, in the form of an impact and communication study, is often the more accurate tool but it can also be the more expensive and time consuming. This method entails target consumers viewing the advert and then answering a series of questions. The key elements of communication can be checked e.g. if scores for appetite appeal for a cream cake product were low, you may want to reconsider your food photography. Impact is tested in terms of level of recall i.e. amongst a number of adverts, did yours stand out and register with the consumer? If you plan to monitor advertising using this method, then allow sufficient time between finishing the advert and conducting the impact and communication test. Any minor adjustments to the creative should then be made before you need the advert to be in-market.

A qualitative study using either focus groups or interviews can also monitor key elements of the advert. In general, this may be quicker and less expensive than an impact and communication study. However, qualitative is more about attitudes and opinions and may not provide the focus of results that are most valuable at this stage. For more information, see How do I: Conduct market research? It will not always be necessary to formally research the creative. In many instances, management judgement or informally using staff response will be sufficient. This is, however, a decision that should be taken as part of the development process. It is always good practice to allow enough time to research, should this be required.

Monitoring media delivery versus plan is a mixture of numbers and opinion. The level of information and accuracy will vary by media. For example, a television campaign can be fairly accurately monitored by a Buying Review. The Buying Review takes place after the campaign; it takes about eight weeks to get the relevant viewing information from the television channels. In this review the estimated number of your target audience that saw the advert is compared against the planned target. The review will also monitor market conditions and competitor activity in the campaign period i.e. if a competitor was particularly active then this could affect your impact in market. Finally, the review will report on the actual media spend versus plan.

Similar reviews can be undertaken in all other media. However, audience data varies by media e.g. poster activity cannot be reported in terms of viewing figures. Instead, number of poster sites is used comparatively to monitor the media impact of activity. Monitoring requirements should be agreed with your advertising or media agency at the planning stages of the campaign to ensure you are comfortable with what can be achieved in-market.

The Buying Review is often undertaken by the media-buying agency. However, there are specialist auditing agencies who will undertake the review. These agencies may provide an objective facility; however, you should carefully assess their cost and level of accuracy when considering this as an option.

2. Distribution: can significantly affect the impact of marketing activity so monitoring this element can be an important pre-requisite to evaluation. This involves reporting on level and quality of distribution across a sample of the distribution channel. The size and spread of sample will affect the accuracy of results and should be carefully considered. The distribution audit can be undertaken using your own staff e.g. the sales team, or by deploying a research or field marketing agency.

3. Investment: marketing spend versus budget should be monitored on a regular basis to ensure the activity is being financially controlled and managed to plan. This is principally an internal function that should be part of the regular marketing and finance interface.

4. Price: is a key driver of market performance and should be monitored on an on-going basis. This can be done either internally where staff are asked to complete pricing monitors each week. Alternatively it can be done using a research, or field sales, agency that will report the information at agreed intervals.
5. Promotion: There are a number of techniques, which can be used, dependent on the nature of the promotional activity. Most rely on using a sample to predict the overall level of activity, as a full market audit may be too costly and time-consuming to justify. The most common techniques include:

- **Mystery shoppers:** This is used to monitor the in-market activity. For example, with a promotion which involves a free glass of your liqueur with a meal in a particular chain of restaurants, a team of "mystery eaters" may dine at a sample number of restaurants and report on various aspects of the promotion e.g. Was it advertised in the restaurant?; Did the waiting staff introduce it?; Did diners automatically get asked if they would like a free liqueur?: or, Did they receive it whether they wanted it or not?

- **In-store audits:** This will be used to monitor the level of activity in key stores. For example, reporting on the number of promotional packs in-store, level of promotional point of sale, ability to redeem the promotional voucher in-store. These audits will monitor delivery of the activity across the period of the campaign. They can often highlight significant problems at an early stage e.g. promotional codes have not been issued to stores by head office, or point of sale has not arrived.

- **Telephone research:** Is often used to monitor direct marketing activity. For this, a sample of the recipient consumers will be telephoned and asked questions about a particular piece of activity e.g. did you receive your malt whisky leaflet?, did you use the voucher?

- **Sample mailings:** Are also used to monitor the effect of direct mail. This is where a pre-selected sample will be included on the mailing list to assess the activity. Normally this will be members of staff who are then asked to report on the activity by completing a questionnaire e.g. Did they receive the mailing?; What condition was the sample in when they received it?; Did they understand the leaflet?

**HOW DO I? SUMMARY**

1. Include the monitoring process from the start of the activity planning.
2. Develop the monitoring plan based on What, How, Who and When.
3. Choose the preferred monitoring methods and agree the implementation plan with the key parties.
4. Use monitoring reports to inform activity recommendations and as part of the evaluation process.

**OTHER SOURCES OF INFORMATION:**

Visit [www.scotlandfoodanddrink.org](http://www.scotlandfoodanddrink.org)

- **INSIGHTS:** You can access data on geographic markets, consumers, retailers, foodservice operators, specific product sectors and more

- There are many other How Do I? Guides which can help you grow your business

[www.scotlandfoodanddrink.org](http://www.scotlandfoodanddrink.org) - The information service tailored to the food and drink industry. Contact the Scotland Food & Drink Helpline on **0845 601 3752**.