
Means-End Based Advertising Research: Copy Testing Is Not Strategy Assessment

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This paper applies a means-end methodology to the development of advertising strategy. A procedure including message elements, consumer benefits and driving force (Meccas), and the use of leverage points developed from the means-end analysis to activate values through advertising is presented. Examples of the use of Meccas methodology are discussed. Results are presented for the analysis of an advertisement for Miller Lite beer, using a sample of 42 subjects.

Introduction

The ever-escalating costs of media have made the marketer continually more sensitive to maximizing the return on every advertising dollar. This increased sensitivity has resulted in the frequent use (and misuse) of copy testing methodologies to insure the message conveyed by the ad is both intrusive and is communicating the desired strategic positioning. Standard copy testing methods fail to measure, however, the degree to which the desired strategy is communicated. Given that the marketer spends considerable effort and resources to develop this key and potentially most critical output of the marketing function, the simple question: "to what degree did the execution deliver against the desired positioning strategy?" is of critical importance.

Before this issue can be fully explored and a tentative solution offered, a few basic terms need to be defined. As noted above, one of the primary functions of marketing is to develop strategy, which in the most simple terms means to specify a sustainable and leverageable positioning (with respect to the competition) for a brand to a specified target market. The function of advertising, then, is to effectively communicate this positioning to the target consumer. Advertising strategy is simply the *specification* of the manner by which the brand will be *meaningfully differentiated*

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by the target consumer. Underlying this definition of advertising strategy are two key terms representing the basic tenets of positioning: namely, "specification" and "meaningfully differentiated."

The descriptive term "meaningfully differentiated" suggests the basis upon which the target consumer will find the message personally relevant and thus lead to a feeling positively disposed toward the product, essentially providing the basis for persuasion. This presumes a translation process occurs when the consumer interprets the ad: the translation of meaning between the physical and/or psychological reality of the product and the more personal aspects or motivations of the consumer. It is this translation process that can be viewed as the strategic goal of advertising. The functional requirement of advertising is to have the consumer translate the concepts or meanings that define and thus differentiate the brand with respect to the more personal reasons underlying their importance—the personal motives of the consumer. A simple phrase that represents this strategic imperative is to "persuade by reasons and motivate by emotion."

Put simply, the strategic goal of advertising is to provide a tight and as meaningful linkage or set of linkages as possible between the brand and the personal motives of the consumer. And, it is the "specification" of this set of linkages between the differentiating brand characteristics and the consumer motives that represents the manner in which the brand is positioned. This basic perspective assumes, then, that the degree to which the differentiating brand characteristics can be made personally relevant is defined by the ability of the execution to link these characteristics to important personal motives. To provide the linkages between brand characteristics and personal motives is to maximize the persuasive potential of the strategy.

This rather conceptual definition of the strategic goal of advertising can be best illustrated by considering the interpretation of information provided by the traditional attitude research format commonly utilized in marketing research. The two basic types of questions include beliefs, operationalized as the degree to which a given brand possesses a specific attribute or provides a particular benefit, and the relative importance of these respective attributes and their benefits. Researchers typically report to the marketer summary statistics for each brand in the category with respect to the beliefs as well as the relative importance, which serve as the framework for evaluating potential positioning options. The obvious assumption is that if the brand scores highly (or can be made to score highly) in terms of the belief on a given attribute or benefit dimension, and that dimension is important, the likelihood of purchase or desired choice behavior is increased. Unfortunately, this attitudinal-based framework provides only half of the information needed to develop and specify a strategic positioning.

What is lacking is the specific *reason* underlying the importance of the key attribute characteristic and/or the benefit delivered. The second, unanswered question is: *Why* is the attribute and/or benefit important to the consumer? Or, more formally, what personal motives serve to give the attribute and/or benefit its relative importance? Only by answering this *why* question can marketers truly understand the consumer perspective, which can then be assessed to develop and formally specify strategically based positioning options.

To be more concrete, consider the following example. A major airline conducts a marketing research study that indicates that the attribute of "on time" is viewed

as being very important to a sizable segment of target consumers, as is the very similar and obviously related benefit of "dependable." The belief essentially is in the "on time" performance of this particular airline. Additional FAA research findings confirm the fact that in terms of actual "on time" performance, their airline scores higher than the competition. Thus, an advertising strategy of "on time" performance providing independent, credible evidence to substantiate this claim appears as a highly likely and viable positioning option. As suggested above, however, the second half of the basic positioning question, which involves understanding *why* "on time" and "dependable" are important to the target consumer, needs also be researched. Is it by providing the ability to "get more done" driven by the personal motive of "accomplishment" that makes being "on time" important? Is it by providing an important meaning related to the "professionalism" of the airline and its management and personnel, which serves to reinforce the personal need of "safety"? Is being "on time" providing a sense of tension reduction, "feeling at ease," which is important to the consumer because it fulfills the personal need of "being in control," thereby "minimizing anxiety," which is paramount when one is thinking about the negative aspects of the flying experience? By communicating the higher level meaning in addition to the brand characteristic, effectively linking or bridging these two elements is to define a unique positioning, essentially persuading by the rational attribute element and motivating by the emotional leverage of the personal motive that is, in fact, the reason underlying the importance of the attribute characteristic.

Some would argue, however, that letting viewers interpret their personal meanings to the "on time" positioning maximizes the breadth of the potential target audiences. This attribute-only strategic option, of course, is also viable for the above stated reason. Yet it is clear that to limit oneself in this manner, to not consider the higher level, more directly persuasive strategic elements, is to limit the scope of the strategy specification process. To fail to tightly link the characteristics of the brand to the personal motives of the target consumer is to fall short of providing maximal persuasive potential to the strategy.

A simple analogy may serve to better illustrate this fundamental point. As stated above, consider the strategic goal of advertising to be to link the brand to the consumer in some meaningful way. Imagine that this set of linkages is that of an electrical network, with the ad providing the connections between the brand characteristics and the personal motives. In this example, to not tightly connect the brand characteristics to the personal characteristics, personal motives, is to let the current diffuse, ultimately permitting less current to flow to the target consumer. The effectiveness of the network of connections is the essence of what advertising communication and maximizing the persuasiveness is all about.

Thus, it is maximizing the connections between and across these levels or types of meanings, essentially linking the brand with the consumer, that serves as the fundamental operational premise of advertising communication. Maximizing these connections or linkages, then, is accomplished by specific features of the execution and is thus the direct responsibility of the advertising agency. Specifying the building blocks or elements of the positioning strategy—the meanings—be they attributes, benefits or personal motives, is the responsibility of the client marketing group. To specify, strategy marketers must identify the

reason(s), at the physical characteristic or attribute level, the benefit or personal consequence level, and the personal motive level. It is the specification at these three basic levels, and their relative strengths within the advertising strategy, that serves as the basis upon which the brand is to be “meaningfully differentiated” with respect to the competition. The charge of advertising then is to devise ways to maximize the meaningfulness of the strategy, which is essentially providing a creative vehicle that tightly links the brand characteristics through the relevant consequences of consumption or use to the personal motives of the target market.

The separation of the operational functions with respect to advertising outlined above permits a basis from which to discuss the key inputs to the specification of advertising strategy as well as the methodological framework under which strategic assessment may be accomplished. The following section formalizes the fundamental requirements of any strategy assessment system. Also presented is a definition of a model of advertising strategy consistent with the prior discussion and these basic specification requirements.

Advertising Strategy Assessment

Requirements for Assessing Advertising Strategy

A system for strategy assessment *must* provide the following:

1. A conceptual framework for understanding consumers in terms of the manner in which they give meaning to products and thus differentiate among them. It is this understanding that provides the formal lexicon of the conceptual elements that may be used in the positioning of the brand.
2. The ability to specify a global perspective or framework of the market place, identifying the current positioning of one’s own brand and that of the competition, including their respective perceptual strengths and weaknesses. The positioning is defined by the combination of the elements of the consumer lexicon that is used to position the brand, which primarily is a function of the advertising strategy.
3. A means to translate the consumers’ reasons for product differentiation selected to be the basis for the positioning into their respective components or elements of an advertising strategy paradigm. This requires the specification of advertising strategy to be made in consumer terms, and grounded in theory, either from a cognitive processing and/or a social psychological perspective.
4. A direct basis upon which to measure the communication of each of the elements of the strategy, as well as their interrelationships, in a research framework consistent with the underlying strategy specification paradigm. This requirement implies the fundamental reality that the processing of communication cannot be represented solely by an independent set of variables representing the conceptual elements of the positioning. Rather, the associations between concepts, which are the basis of giving meaning to products, must also be included in a formal, theoretically consistent manner.

Theoretical Premise of Means-End Theory

A theoretical paradigm of means-end theory provides both a cognitive and social psychological framework for understanding how consumers differentiate between competitive products and ultimately assign personal utilities that result in choice behavior. The central principle of the means-end approach is the interpretation process between the brand and "self." Giving meaning to a particular brand, defined by specific attributes, essentially depends upon what higher order, more personal elements the defining brand attribute(s) are linked to. The three broadly defined levels are:

1. *Attributes*, which are characteristics of products;
2. *Consequences*, which are the reasons why the attribute is important to the consumer, basically the personal interpretation or meaning given to the individual attribute; and
3. *Values*, which are the end-states that represent the governing drives that the individual has with respect to self perception or how one would like to be perceived.

This top down view of cognitive processing and the manner in which brand information is organized within memory represented in means-end theory, from "self" to brand characteristics, assumes that values give the relative importance to corresponding consequences as consequences give relative importance to the attribute characteristics of the competing brands. This "egosodic" perspective of consumer information processing brings into focus the issue raised in the introduction of this paper; namely, that traditional attitude research only addresses part of the real research question. By only focusing on the relative importance of brand attributes and the belief component with respect to individual brands, attitude models overlook both the personal reasons underlying the derivation of this importance (consequences), and the yet even more personal reasons underlying the relative importance of the consequences (personal values).

The primary methodology to uncover the set of consumer meanings, their lexicon, and the structural linkages between the meanings designating the underlying reasons of importance across the three basic levels is termed laddering. Laddering is an in-depth, one-on-one consumer interviewing technique specifically designed to uncover these underlying, higher level reasons *why* key, differentiating attributes of particular brands are important to the individual consumer. After a representative sample of target consumers is interviewed, a summary hierarchical value map (HVM) representing both the overall lexicon and the dominant connections between each key element of the lexicon, can be constructed. An example of an HVM for the light beer category appears in Figure 1.

The HVM for light beer provides a composite representation of all the perceptual segments or orientations represented within the target consumer group. Each of the pathways of consumer associations, from the attribute level to the value level, can be specified as an individual orientation. The HVM provides the marketing strategist a segmentation system that both answers the *why* question as to the importance of key strategic elements and yields a framework for evaluating the

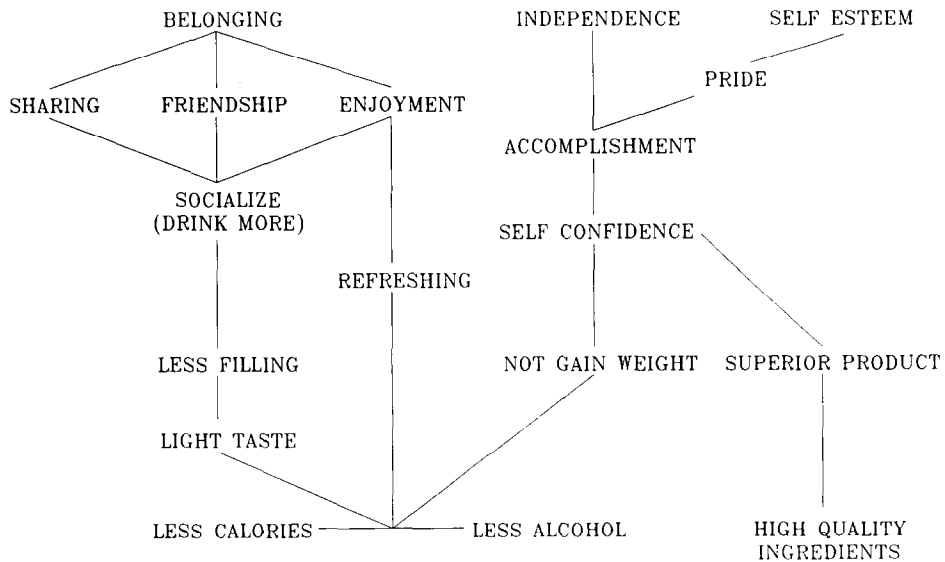


Figure 1. "Hypothetical" hierarchical value map for light beer category.

strengths and weaknesses of competitive positionings on a strategic level. In the next section, a formal advertising specification model using the HVM output from laddering research will be reviewed.

Meccas Model

The Meccas Model for specifying advertising strategy uses the same means-end conceptual framework of laddering. Figure 2 defines each of the five key specification elements, four strategic and one executional. Each of the three basic levels of differentiation—attributes, consequences, and values—can be seen to correspond to the specification of Message Elements, Consumer Benefit, and Driving Force, respectively. The fourth strategic element is the Leverage Point, which is the manner in which the advertising bridges the physical reality of the brand and makes it personally relevant to the consumer. To quote: "the means by which the advertising "taps into" or "activates" the value or end-level of focus." The Leverage Point can be considered the personification of the brand, a personal trait, that when communicated, activates the Driving Force or end-level of focus. Values exist in the heads of the consumers. They do not have to be directly presented in a given execution; rather, they need to be "activated" or tapped into by the advertising. To be cognizant of this fact is to avoid the heavy-handed value oriented executions we often see on television, which run the substantial risk of counter-argument by the consumer.

The fifth element, the Executional Framework, is for the specification of the details of the advertising execution. The goal of the execution is to bridge the brand to the consumer, which is to functionally link the four strategic elements as tightly as possible. It is the creative devices, then, that provide the basis for associating the key strategic elements, linking the brand to the personal motive that serves to drive preference, and ultimately, choice behavior. A given strategy should

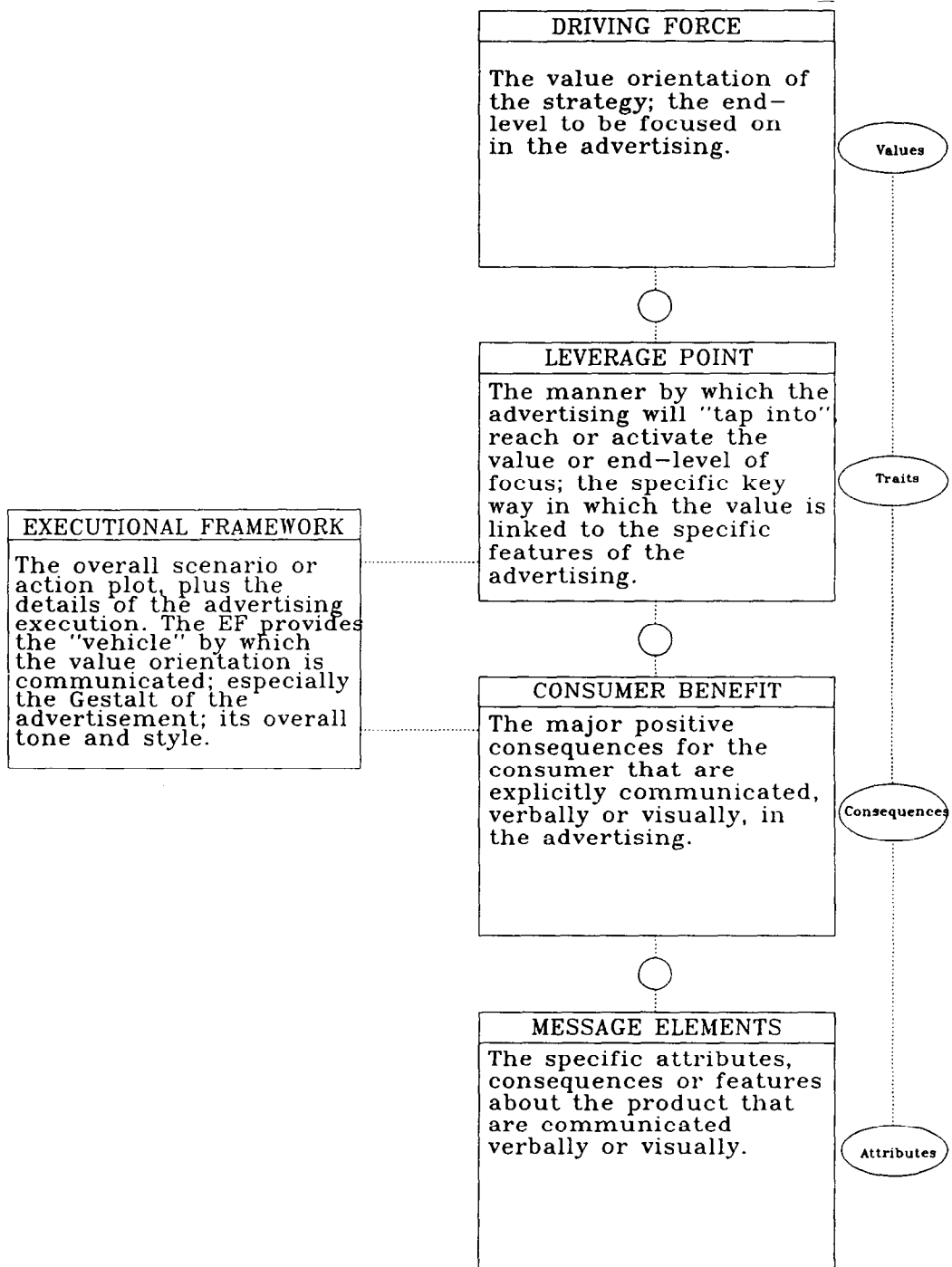


Figure 2. Meccas model.

not be expected to communicate highly on all four strategic levels; thus the specification of strategy must indicate the dominant level or elements of focus. Once specified, however, it is the charge of the creative devices to provide as many tightly linked associates as possible.

Strata Model

To provide an example of this entire strategic and creative process, the famous and quite successful Miller Lite advertising campaign with the former professional athletes will be used. Of course, this campaign was developed prior to, and independent of, the formalization of the Meccas Model. The understanding gained by illustrating the Meccas approach to strategy specification, in combination with the new strategy assessment paradigm of Strata™, which is consistent with the theoretical direction offered above, should serve to provide a solid basis for extension to both future strategy development and assessment issues.

The key strategic elements at the respective levels and their relative strength of communication should be specified *a priori*. The specification of the four strategic elements (see Figure 3) provides the framework of what could have been originally specified for Miller Lite in 1973. Note that these key strategic elements correspond closely to the related set of perceptual orientations or segments represented on the left side of the HVM (see Figure 1). The numbers in the ovals to the right of the strategic elements refer to the *a priori* specification of the desired strength of the communication on a 0 to 100 scale, with 100 referring to “strongly or perfectly” communicated. The numerical specification indicates that the lower, attribute and benefit, levels are to be focused upon strongly, with significantly less emphasis at the higher levels. One could conjecture that there was really no reasonable choice other than focusing on some unique differentiating characteristic at one or preferably both of the lower levels. To focus a new product solely at the image or value level, in particular, one that at the time of introduction undoubtedly had a significant barrier to its acceptance by the “macho,” full-bodied beer drinker, would have been to run a sizable and totally unnecessary strategic risk. The question marks in the Executional Framework box and in the circles between the four strategic elements are representative of the challenge given to the creative function. *The creative task, then, is to communicate the key elements at the respective levels specified and to maximize the connections between the respective levels.*

Before discussing how the creative team accomplished these goals, the fundamental question of how to assess or measure the degree to which the strategy was communicated needs to be addressed. The primary requirements of such a strategy assessment system are:

1. The strength of each strategic element across all levels of the communication must be directly assessed.
2. The strength of the key linkages or connections between adjacent strategic elements must be directly assessed.

Traditional copy testing methodologies typically do not address the higher level meanings in any detailed form, nor do any of the copy testing methodologies directly assess the degree of connection between any of the strategic elements. Given that the role of the creative process is to develop an executional framework that produces

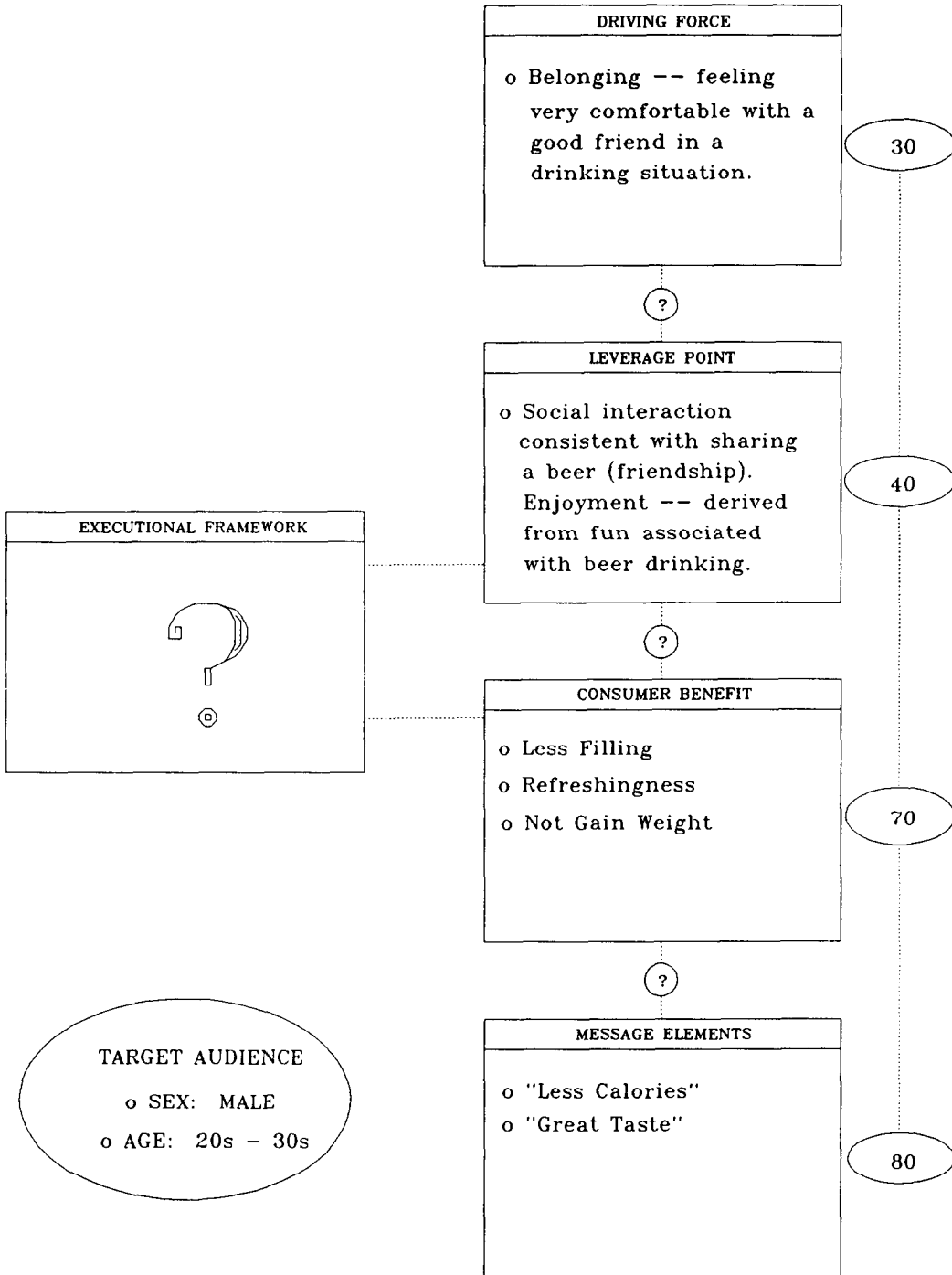


Figure 3. Subjective Strata™: Specification for Miller Lite "golf."

the tightest possible linkages between the brand and "self," this missing assessment is central to the strategic assessment of communications. The Strata™ methodology meets these operational requirements. In interest of brevity, however, the details of this quantitative assessment methodology will not be formally presented; rather, the basic objective summary output will be discussed. A summary of the Strata™ interview methodology is shown in Appendix A.

A summary Strata™ analysis (n=42) of one of the most famous executions of the strategy, the Dick Butkus-Bubba Smith golf spot, appears in Figure 4. The single digit numbers (0 to 9 scale, with 9 being "perfectly" connected) in the circles represent the highest degree of connection between the highest scoring element at each respective level. The scale is derived by multiplying the communication score of each of the connections by the two scores of the Meccas levels being connected. The resulting product is rescaled in a probabilistic fashion to provide greater discriminatory power at higher levels of communication strengths.

The double digit numbers seen within the boxes represent the strength of the communication of that specific element on the 0 to 100 scale. The number in the oval to the right corresponds to the highest level of communication at that respective level.

Interpretation of the Miller Lite "golf" ad reveals that the Message Elements of "less calories," "great taste," and "light taste" are communicated at a high level. Similarly, the Consumer Benefits of "less filling" and secondarily "enjoyable-relax" are also communicated highly. Importantly, the strength of the linkage between the highest scoring element at each level, "less calories" and "less filling," is a 7, which indicates the connection is made to a very significant degree. (The complete Strata™ summary contains the strength of the connections between all strategic elements at adjacent levels which would be required for a total diagnostic assessment of the communication.)

Looking to the Leverage Point, the key concept of "friendship" or camaraderie, along with the related experiential feeling of "good times and fun associated with beer drinking," derived from the humor of the execution, are well communicated. Also appropriately communicated is the more personal, closely related concept of "sharing." The linkage between the Consumer Benefit level and the Leverage Point is a 6, which again indicates a very strong connection. It is this area of connection between the Consumer Benefit and the Leverage Point that represents the *degree of personal relevance* attributed to the brand by the consumer. The connection from "friendship" at the Leverage Point to the higher personal value of "belonging" is a 4, which again represents an extremely strong connection given the strength of the respective elements.

Summary

The theoretical frame offered by means-end theory provides a basis for understanding in a more rigorous manner the conceptual foundation of both positioning strategy and the nature of the strategic function of communication. The near perfect example of the Miller Lite advertising demonstrates the basic notions underlying the concept of strategy assessment and the need, and potential for a totally new type of assessment paradigm. As such, this perspective and the corresponding assessment paradigm differ significantly from any current copy testing methodol-

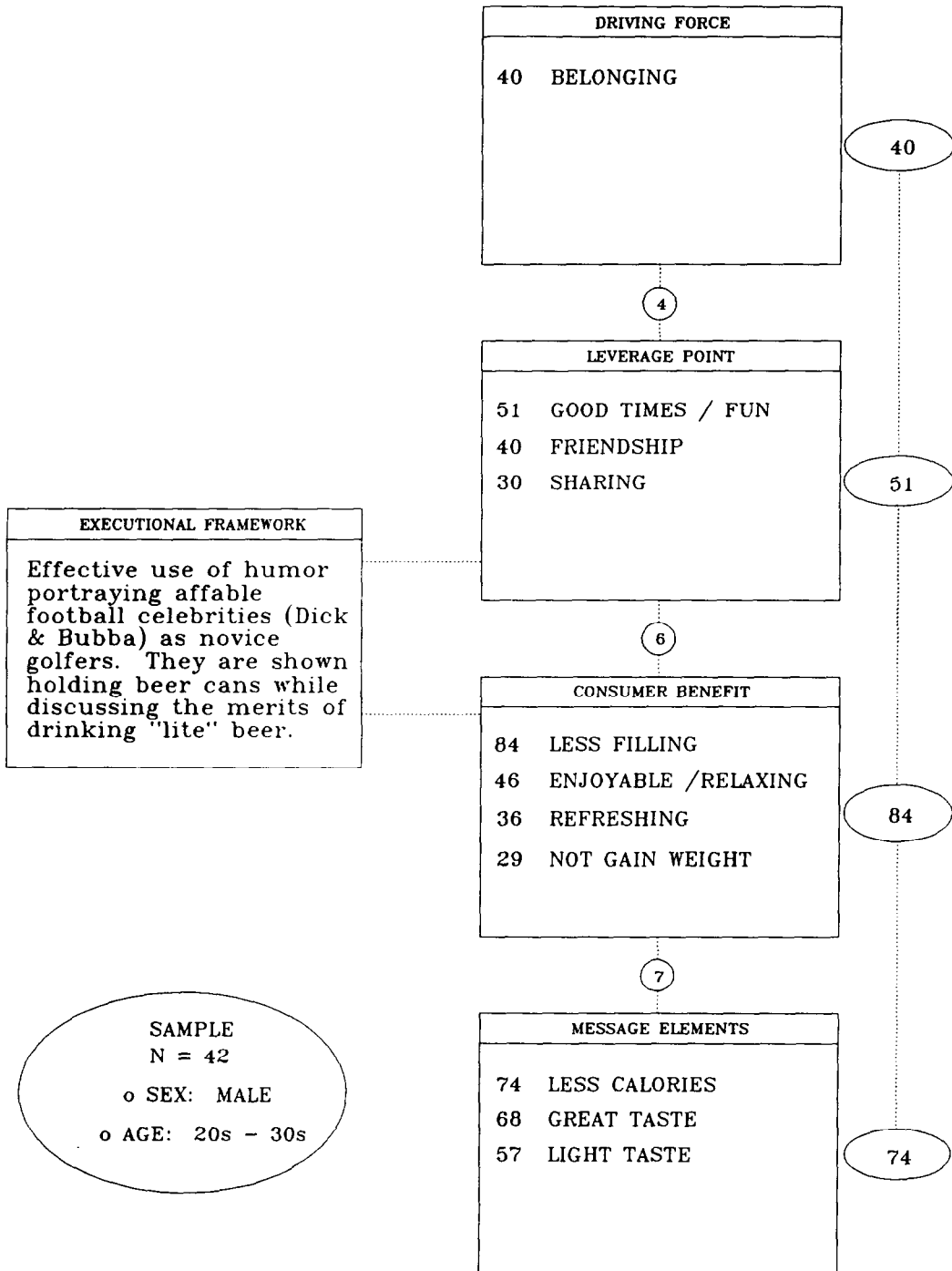


Figure 4. Objective Strata™: Results for Miller Lite "golf."

ogies. This analytic framework, represented by the Meccas Model and the strata methodology, provides a theoretically based, empirically derived approach to the assessment of strategic aspects of advertising: A perspective that can be, and should be, considered in conjunction with the traditional copy testing measures of intrusiveness and recall.

Appendix A. Summary of Components of Strata Interviewing Methodology

Part

1. **View Ad A.**
2. Qualitative Questions (e.g., "main point," etc.)
3. **View Ad B.**
4. Qualitative Questions (e.g., "main point," etc.)
5. **View Both A and B.**
6. Affect Statements (both Brand and Ad).^a
7. Message Element Statements.^a
8. Consumer Benefit Statements.^a
9. **View Both A and B.**
10. Executional Framework Statements.^a
11. Leverage Point Statements.^a
12. Driving Force Statements.^a
13. **View Ad A.**
14. Ad A Connections for ME to CB.^b
15. Ad A Connections for CB to LP.^b
16. Ad A Connections for LP to DR.^b
17. **View Ad B.**
18. Ad B Connections for ME to CB.^b
19. Ad B Connections for CB to LP.^b
20. Ad B Connections for LP to DF.^b

^aAdministration of two step rating process. Step 1 involves answering question as to which ad(s) the statement applies, if any. Step 2 involves, for each ad that the statement was applicable, judging to what degree.

^bAdministration of all adjacent level pairs which were judged as applicable the three point Venn diagram scale reflective of degree of connectedness.

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