T-Mobile Milestones…from the early days of One2One first for Picture Messaging & SMS, before becoming T-Mobile
Through to the launch of Data, Flext, Network sharing with 3, Android and the JV with Orange...
Brand Tracking at T-Mobile followed a traditional route pre 2010…

Objective: Understand Brand Health and the impact from Comms

Pre 2009: Brand & Ad Tracking combined

2009+: Removed Ad Tracking, Track Brand Health only (But Ads still pre-tested)

But issues with linking the two:
- TV Over-claim
- The assumption that nothing else drives Brand Health
And every month felt like information overload…
Leaving us with tough decisions to make each month…
KPI setting & measurement = too many cooks…

- Which customers
  - New or Existing?

- Which market
  - PAYM or PAYG?

- Which Metric
  - & How often?
In 2010 we set Quarterly objectives…

- **TWO lead measures ONLY**
  - Brand Consideration
  - VFM

- **Use relative position vs. the market**
  - Challenger position means we need to keep track of the market
  - Accounts for Market Dynamics: Not ATL, you’re forgotten

- **Business focussed on these**
  - We needed to understand how best to monitor these and provide clear direction on performance
Hence a new approach was required for how we bridge the gap between Brand Health & Comms

**Our Challenges:**

1. Equip us with richer insights to help us understand campaign impacts and actions to take
2. Help us understand campaign cut-through & wear-out by media
3. Provide a measure of emotional and functional performance for our communications
   - Demonstrate the impact on brand health

**Over-arching:**
Stop the reactive fire-fighting we’ve adopted when following traditional brand tracking
Brand Tracking at T-Mobile has evolved…

Objective: Understand Brand Health and the impact from Comms

Pre 2009: Brand & Ad Tracking combined

2009+: Removed Ad Tracking, Track Brand Health only (But Ads still pre-tested)

2010+: Brand Health Tracking Separate Pre-Testing

Experience Tracking - 360 campaign evaluation
Introducing Experience Tracking
The Experience Tracking Approach

Legacy Brand Health

Participants complete a Legacy Brand Health questionnaire in advance of starting the real-time texting process. This contains the usual tracking measures plus other metrics.

Current Brand Experience

Participants text the brands and experiences they come across during the week in field. We combine brand and experiences together.

Every other day participants are required to visit their SMS diary to embellish the experiences they have already texted about.

Future Brand Direction

After 7 days of texting and a final visit to the diary, participants complete a Future Brand Direction questionnaire before exiting the survey. This is a good place to look into specific ad recall and diagnostics in more detail.

Traditional tracking stops here… Experience tracking starts here!...
Texting framework

Text us whenever you see, hear or experience anything to do with the following mobile network providers...

<table>
<thead>
<tr>
<th>BRAND:</th>
<th>OCCASION:</th>
<th>FEELING:</th>
<th>CHOICE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) 3 Mobile</td>
<td>a) TV</td>
<td>5) Very positive</td>
<td>5) Much more likely to choose</td>
</tr>
<tr>
<td>b) O2</td>
<td>b) Poster/Billboard</td>
<td>4) Fairly positive</td>
<td>4) Slightly more likely to choose</td>
</tr>
<tr>
<td>c) Orange</td>
<td>c) Radio</td>
<td>3) Neutral</td>
<td>3) No change</td>
</tr>
<tr>
<td>d) Tesco</td>
<td>d) Conversation</td>
<td>2) Fairly negative</td>
<td>2) Slightly less likely to choose</td>
</tr>
<tr>
<td>e) T-Mobile</td>
<td>e) Cinema</td>
<td>1) Very negative</td>
<td>1) Much less likely to choose</td>
</tr>
<tr>
<td>f) Virgin</td>
<td>f) Newspaper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g) Vodafone</td>
<td>g) Magazine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h) In Store</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) At an event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>j) Online</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>k) SMS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>l) Mail/Leaflet</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>m) Call centre</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n) Shop window</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o) Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The participant receives…

NETWORK_PROVIDER: A) 3-Mobile  B) O2  C) Orange  D) Tesco Mobile  E) T Mobile  F) Virgin Mobile  G) Vodafone  H) Other


FEELING: 5) Very positive, 4) Fairly positive, 3) Neutral, 2) Fairly negative, 1) Very Negative.

CHOICE: 5) Much more likely, 4) Slightly more likely, 3) No difference, 2) Slightly less likely, 1) Much less likely
The participant experiences…
T-Mobile, Newspaper, Very Positive, Much more likely to choose next time
And complete their diary.
Challenge 1:
Provide richer insights to help us take decisions
At the end of 2009 and the start of 2010 we experienced a decline in Consideration for Pay-Monthly…

And we very quickly needed to understand if this was going to worsen or be turned around by the forthcoming campaign…
MESH data showed key brand health metrics ALL shifting positively as a result of the February activity.

<table>
<thead>
<tr>
<th>T-Mobile</th>
<th>Feb.10</th>
<th>Statements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Future Brand Direction Shift</strong></td>
<td>534</td>
<td><strong>Is a brand that I would be proud to use</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>A brand I trust more than others</strong></td>
</tr>
<tr>
<td>Brand Consideration (T2B)</td>
<td>+6%</td>
<td><strong>Has the latest handsets</strong></td>
</tr>
<tr>
<td>Emotional connection(T2B)</td>
<td>+6%</td>
<td><strong>Has competitive prices</strong></td>
</tr>
<tr>
<td>Momentum (T2B)</td>
<td>+3%</td>
<td><strong>Is better value for money than others</strong></td>
</tr>
<tr>
<td>Quality (T3B)</td>
<td>+5%</td>
<td></td>
</tr>
</tbody>
</table>

↑ = Significant POSITIVE shift in metric score
This was driven by the new Smartphones for Everyone campaign launched in Mid Feb

“Seen on Five player online. The advert with the geese again, the 2nd time I've seen this. Made more sense seeing it a second time, and good that they are making smart phones available to everyone. The advert makes sense now.”

T-Mobile, TV, Ad from network provider, Fairly Positive, Slightly more likely to choose
Experience Tracking convinced us our performance was likely to recover…

Uplift in Consideration for PM was the strongest we have seen in over a year…
Challenge 2:
Understand Wear-out & Cut through by media
Engagement levels with T-Mobile TV drop significantly by April

Comparative Performance of T-Mobile TV advertising

Choice T2B - Average (%) vs. Positivity T2B - Average (%)

Source: Current Brand Experience Apr n=191, Feb n=269, Dec n=152
In February we saw that ‘Geese’ made the ad interesting to watch. Smartphones communication cut through strongly…

Source ; Current Brand Experience (Text Data 197 comments)
By April, people are starting to get fed up with it

Source: Current Brand Experience (Text Data 191 comments)
Media placement exacerbated wear-out as ad becomes irritating and people switch off to message

“The 'geese' ad again! It’s not just that it is a patronising ad in the first place but it is on such heavy rotation that it rapidly becomes extremely irritating.”

T-Mobile, TV. Ad from network provider, Very Negative, Put me off

“A TV ad with geese going through streets of London. I have seen it far too often (in the ad breaks during ipl) and so haven’t really listened to the message it's trying to tell.”

T-Mobile, TV. Ad from network provider, Fairly Negative, No difference
Whilst TV shows signs of wear-out, Online and Newspaper become much more engaging and persuasive.

Source: Current Brand Experience (Text Data)
April n=328, February n=918, December n=795

*Market average has been indexed so that it now equals 0.
Eye-catching colour, good handsets and good offers are attracting attention in print

Eye-catching, picture symbolizes that this network is for "normal" people, good variety of handsets
T-Mobile, Newspaper, Fairly Positive, Slightly more likely to choose

This advert was in the Sun on Tuesday and really caught my attention. I really liked this advert and the deal on offer and it gave you a lot of variety which I liked. This ad would definitely make me consider them in the future.
T-Mobile, Newspaper, Fairly Positive, Slightly more likely to choose
The majority of Online experiences for T-Mobile were through own ads and own website.

It is the content people find particularly persuasive.

Source: Current Brand Experience
Base size: 64 texts
As in press, the smartphone ads, particularly Blackberry were appealing to a range of people

“I was looking at the t-mobile website at their deals for smartphone and blackberry. I found their deals interesting and their prices competitive. They offered smartphone/blackberry which came with minutes. I am likely to consider their offers.”
T-Mobile, Online. Fairly Positive, Slightly more likely to choose.

“It was advertising the new blackberry at a good rate”
T-Mobile, Online. Fairly Positive, Slightly more likely to choose.

Orange customer

Tesco customer
Challenge 3: Understand the functional and emotional response to Welcome Home – is it effective at driving consideration for TMUK?
Pre-Testing gave us some encouraging feedback for EMOTIONAL CONTENT and FUNCTIONAL TAKE-OUT.
Pre-testing also suggested that BRAND MOMENTUM and CONSIDERATION were moving in the right direction…

<table>
<thead>
<tr>
<th>Uplifts vs control (NB small sample sizes)</th>
<th>T-Mobile customers</th>
<th>Non-TM customers</th>
<th>Parents</th>
<th>Non-parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘On the up’</td>
<td>+14%</td>
<td>+17%</td>
<td>+16%</td>
<td>+16%</td>
</tr>
<tr>
<td>‘Stands out from others’</td>
<td>-8%</td>
<td>+17%</td>
<td>+9%</td>
<td>+17%</td>
</tr>
<tr>
<td>Consider T-Mobile</td>
<td>-11%</td>
<td>+9%</td>
<td>+7%</td>
<td>+3%</td>
</tr>
<tr>
<td>Favourable towards TM</td>
<td>-10%</td>
<td>+6%</td>
<td>-6%</td>
<td>+9%</td>
</tr>
</tbody>
</table>

And from non-customers
Welcome Home contributes towards T-Mobile’s best-in-class engagement performance.

Significant shifts in Momentum, Quality, Value for Money with high Reach and good quality experiences.

Source: Current Brand Experience (Text Data) n for Welcome Home (25th Oct to 26th Nov) = 4231 / Market average: 45% (Positivity); 40% (Choice)
Welcome Home’s high profile TV reach is reflected in the channel’s performance, with indications it translated into positive and persuasive chatter about T-Mobile.

T-Mobile Channel Profile Against Market- Welcome Home
(25th October to 26th November)

* Low base (20-29)

Source: Current Brand Experience (Text Data) n for Welcome Home (25th Oct to 26th Nov) = 3928/ Market average: 45% (Positivity); 40% (Choice)
As intended, the TV ad is not only engaging but persuasive too.

“Quite possibly the best TV advert ever. This is the one set in the airport. It catches your attention every time. Fantastic advert by t-mobile. Seen on Channel 4”

T-Mobile, TV, Ad from network provider, Consumers, Very positive, Much more likely to choose

“Tremendous Advert. Had everything that should tempt consumers to seek out new deals with T-Mobile”

T-Mobile, TV, Ad from network provider, Both, Very positive, Much more likely to choose
And is being spread well virally through YouTube and Facebook

“Showed the latest t-mobile viral commercial to my parents who thought it was incredible”

T-Mobile, Online, Viral Video on Video Sharing site e.g. You Tube, Very positive, Much more likely to choose

“T-Mobile Welcome back advert linked from a friend's facebook page. I clicked and watched the video on youtube - good video”

T-Mobile, Online, Viral Video on Video Sharing site e.g. You Tube, Very positive, Slightly more likely to choose
Importantly the TV was well received by non-customers and PAYG

Source: Current Brand Experience (Text Data) n = for Welcome Home (25th Oct to 26th Nov) = T-Mob Cust 169, T-Mob non-cust 454, PAYM 255 PAYG 365 / Market average: 45% (Positivity); 40% (Choice)
The popularity of T-Mobile amongst non-customers and PAYG shifted positively

Welcome Home Brand Image Shift Pre-Post (Non T-Mobile Customers)

- Is a popular brand: 8% (PAYG) vs. 6% (Non T-Mobile)
- Has good customer service: 4% (PAYG) vs. 1% (Non T-Mobile)
- They treat their customers fairly: 5% (PAYG) vs. 4% (Non T-Mobile)
- Reward their customers: 5% (PAYG) vs. 4% (Non T-Mobile)
- Deal with customers in an open and honest way: 4% (PAYG) vs. 2% (Non T-Mobile)
- Has a reliable network: 4% (PAYG) vs. 1% (Non T-Mobile)
- Is better value for money than others: 3% (PAYG) vs. 1% (Non T-Mobile)
- Has competitive prices: 5% (PAYG) vs. 4% (Non T-Mobile)
- Has the latest handsets: 4% (PAYG) vs. 2% (Non T-Mobile)
- Has straightforward pricing: 4% (PAYG) vs. 1% (Non T-Mobile)
- Is a brand that I would be proud to use: 6% (PAYG) vs. 4% (Non T-Mobile)
- A brand I trust more than others: 5% (PAYG) vs. 3% (Non T-Mobile)
- Acts upon advice from its customers: 5% (PAYG) vs. 3% (Non T-Mobile)
- Listens to and takes advice from its customers: 4% (PAYG) vs. 3% (Non T-Mobile)

Source: Pre and Post questionnaires Welcome Home (25th Oct - 26th Nov)
WH Performance
(As of 17\textsuperscript{th} Jan)

- 6.6m views on Youtube
  - 23,036 ratings from users
  - (98\% positive / 2\% negative)

- 40k Facebook fans

PayG Sales Performance
- Dec achieved 99\% of target
- From Mid Dec exceeded weekly target by 30\%

PayM Sales Performance
- Dec achieved 98\% of targets
- Retail achieved 104\% of its target
Experience Tracking helps gives us make more Insightful Decisions…

- Media scheduling/laydown
- How to optimise Creative
- When to rotate copy
Future client challenges

360 campaign evaluation

Advanced analytics
   Level of execution
      Faster response
         Purchase window impact
             Calibrating against external data
                Integrated research programmes
                    Proposition v creative vehicle

Transition from Brand to Experience Tracking