

A man and a woman in business attire are sitting outdoors, looking at a smartphone together. The man is wearing a black suit and glasses, and the woman is wearing a grey plaid blazer and glasses. They are both smiling. The background shows a park-like setting with trees and flowers.

2020

Establishing A Connection

How TV Builds Consumer Intent
in the Telco Category



Insights.
Inspiration.
Impact.

About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.





Making an impression through TV advertising

Telecommunications is a highly competitive category with several major companies investing hundreds of millions of dollars in TV annually while a series of smaller upstarts are also investing in TV to actively build their customer base.

In this report, **'Establishing A Connection,'** we examine the TV impressions delivered by **15 telco brands over the last four years** (April 2016 – March 2020) in relation to their website traffic to understand what, if any, effect the level of consumer exposure for their TV messaging had on brand intent.

Utilizing trusted third-party data monitoring and measurement providers such as Nielsen Ad Intel and Comscore for our analysis, we found that:

- **80% of brands analyzed exhibited a direct correlation** between TV IMPs delivered and website traffic
- On average, the brands with a definitive, positive correlation **increased their TV IMPs by +15% and saw their unique monthly visitors increase 21%**

This report, which focuses on impressions and share of voice, serves as another proof point in our series of analyses **highlighting the strong correlation between TV investment and consumer action** throughout the purchasing funnel.

To see similar analyses across other categories such as direct-to-consumer, automotive, credit cards, bedding / mattresses and mobile apps, click [here](#) to visit the Insights page on the VAB website.

Telecommunications Category Correlation Analysis: 15 Brands – Across All Sizes and Investment Levels - Were Examined

- ▶ For each company, we examined their average monthly TV impressions delivered and website traffic over the last 24 months (April 2016 – March 2020) to understand what, if any, effect their TV investment had on brand consideration, intent and conversion



Note: The Telco brands included in this analysis have TV spend / delivered impressions within the 'communications & public utilities' major category per Nielsen AdIntel and their branded digital platform (website/app) is measured in Comscore

'Total Universe' Findings: A Definitive Correlation Between TV Impressions Delivered & Website Traffic

- ▶ **12 of 15 telco brands (80%)** analyzed exhibited a direct correlation between TV IMPs delivered and website traffic (Apr '16 – Mar '18 vs. Apr '18 – Mar '20)

12 Brands

10 Brands Were  in Both TV IMPs & Monthly Unique Visitors
2 Brands Were  in Both TV IMPs & Monthly Unique Visitors



3 Brands

Lack of correlation between TV IMPs & Monthly Unique Visitors

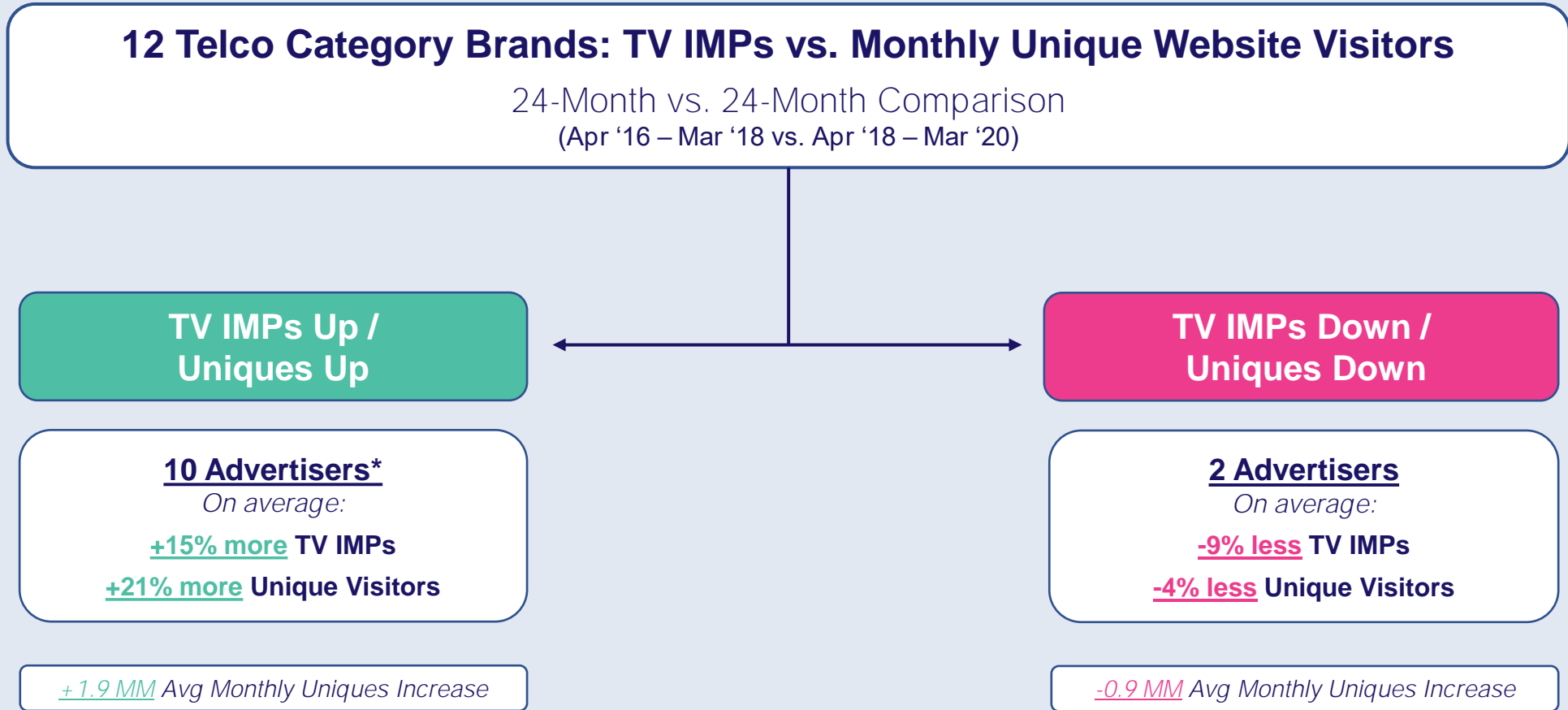


Source: VAB analysis of Nielsen Ad Intel data, telco brands within 'communications' major category, TV impressions, P18+, Live + 7 (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), April '16 – March '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), April '16 – March '20 (calendar months).

Topline Findings:

Impact of TV activity on Telco brands with a definitive correlation

▶ Shifts in telco brands' TV impressions delivered aids in increasing, or decreasing, website traffic



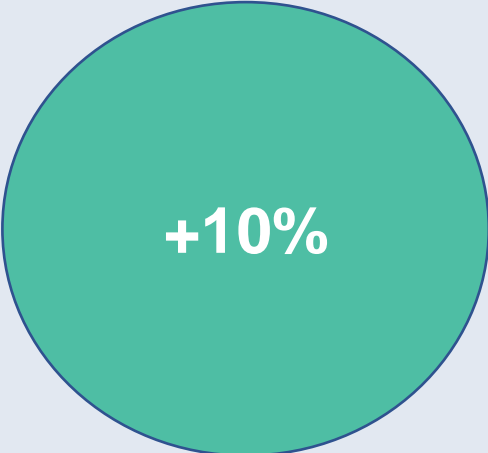
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The ten advertisers that increased their impressions also collectively saw their **share of voice increase** within the category as well

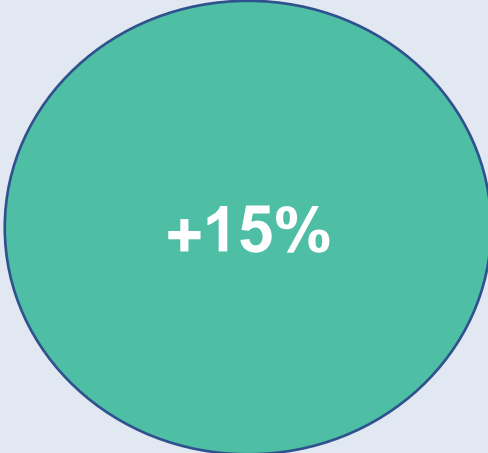
10 Brand Correlation: TV IMPs Up / Monthly Uniques Up

24-Month vs. 24-Month Comparison: Apr '16 – Mar '18 vs. Apr '18 – Mar '20

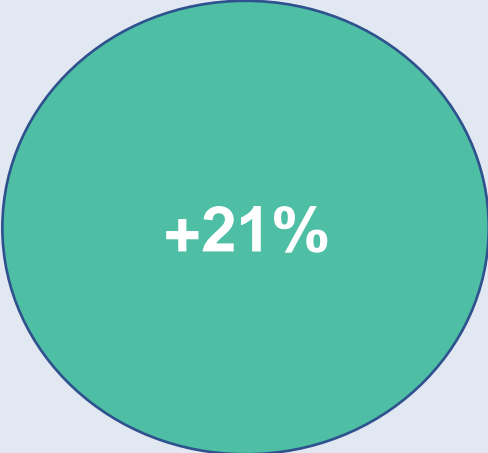
Category SOV



Impressions








Unique Visitors



Source: VAB analysis of Nielsen Ad Intel data, telco brands within 'communications' major category, TV impressions, P18+, Live + 7 (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), April '16 – March '20 (calendar months). VAB analysis of Comscore mediameatix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), April '16 – March '20 (calendar months). *While 10 advertisers showed a positive correlation, Mint Mobile and Simple Mobile are excluded from this analysis since their website traffic was not measured by Comscore until after March 2018 (measured traffic began being reflected only after their first TV campaign had launched). Share of Voice was based on a comparison of the aggregated impressions delivered across the 10 brands with increased impressions as a percent of the total 'communications' major category impressions per Nielsen AdIntel.

A tight, positive correlation exists between TV exposure and website traffic for Telco brands that increased their impressions

TV Impressions Up, Website Traffic Up (24-Month vs. 24-Month Comparison: Apr '16 – Mar '18 vs. Apr '18 – Mar '20)

<u>Avg Monthly TV IMPs (000):</u>					
Apr '16 - Mar '18:	969,790	3,360,980	244,021	239,215	4,216,062
Apr '18 – Mar '20:	1,801,291	3,556,457	274,739	308,742	4,352,522
% Difference:	+86%	+6%	+13%	+29%	+3%

<u>Avg Monthly Unique Visitors (000):</u>					
Apr '16 - Mar '18:	4,808	12,944	4,348	1,410	34,388
Apr '18 – Mar '20:	8,013	15,214	5,540	2,159	37,287
% Difference:	+67%	+18%	+27%	+53%	+8%

Avg Monthly Unique Visitors Increase (000):	+3,205	+2,270	+1,192	+749	+2,899
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Source: VAB analysis of Nielsen Ad Intel data, telco brands within 'communications' major category, TV impressions, P18+, Live + 7 (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), April '16 – March '20 (calendar months). VAB analysis of Comscore mediameatrx multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), April '16 – March '20 (calendar months).

Additional examples of brands that saw a **spike in web traffic** with increased TV impressions delivered

► Website traffic for two brands, Mint Mobile and Simple Mobile, were not even measured by Comscore until after they began airing their first TV campaign

TV Impressions Up, Website Traffic Up (24-Month vs. 24-Month Comparison: Apr '16 – Mar '18 vs. Apr '18 – Mar '20)

Avg Monthly TV IMPs (000):	Consumer Cellular	T-Mobile	total	mintmobile	SIMPLE Mobile
Apr '16 - Mar '18:	1,034,494	3,501,661	178,224	0	191,963
Apr '18 – Mar '20:	1,551,538	3,753,365	228,921	288,089	221,070
% Difference:	+50%	+7%	+28%	---	+15%
Avg Monthly Unique Visitors (000):				<i>not Comscore measured in first 24 months</i>	
Apr '16 - Mar '18:	792	13,553	718	N/A*	N/A*
Apr '18 – Mar '20:	2,169	17,335	782	889	870
% Difference:	+174%	+28%	+9%	+	+
Avg Monthly Unique Visitors Increase (000):	+1,377	+3,782	+64	+889*	+870*

Source: VAB analysis of Nielsen Ad Intel data, telco brands within 'communications' major category, TV impressions, P18+, Live + 7 (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), April '16 – March '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), April '16 – March '20 (calendar months). *N/A = not enough traffic for Comscore to measure.

Conversely, a **tight, negative correlation** exists between TV exposure and website traffic for telco brands that decreased their TV impressions

TV Impressions Down, Website Traffic Down
 (24-Month vs. 24-Month Comparison: Apr '16 – Mar '18 vs. Apr '18 – Mar '20)

Avg Monthly TV IMPs (000):



Apr '16 - Mar '18:

3,197,964

26,597

Apr '18 – Mar '20:

2,918,562

24,076

% Difference: -9% -9%

Avg Monthly Unique Visitors (000):

Apr '16 - Mar '18:

40,935

97

Apr '18 – Mar '20:

39,146

72

% Difference: -4% -26%

Avg Monthly Unique Visitors Decrease (000):

-1,789

-25

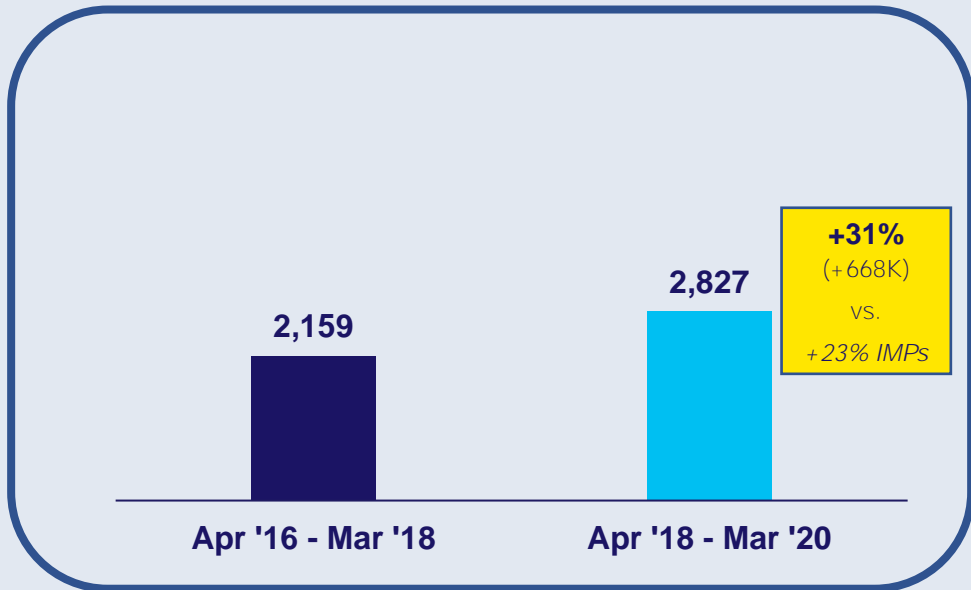
Source: VAB analysis of Nielsen Ad Intel data, telco brands within 'communications' major category, TV impressions, P18+, Live + 7 (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), April '16 – March '20 (calendar months). VAB analysis of Comscore mediameatrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), April '16 – March '20 (calendar months).

On average, Telco brands of all sizes and investment levels saw **double-digit traffic increases** along with their increased impressions delivery

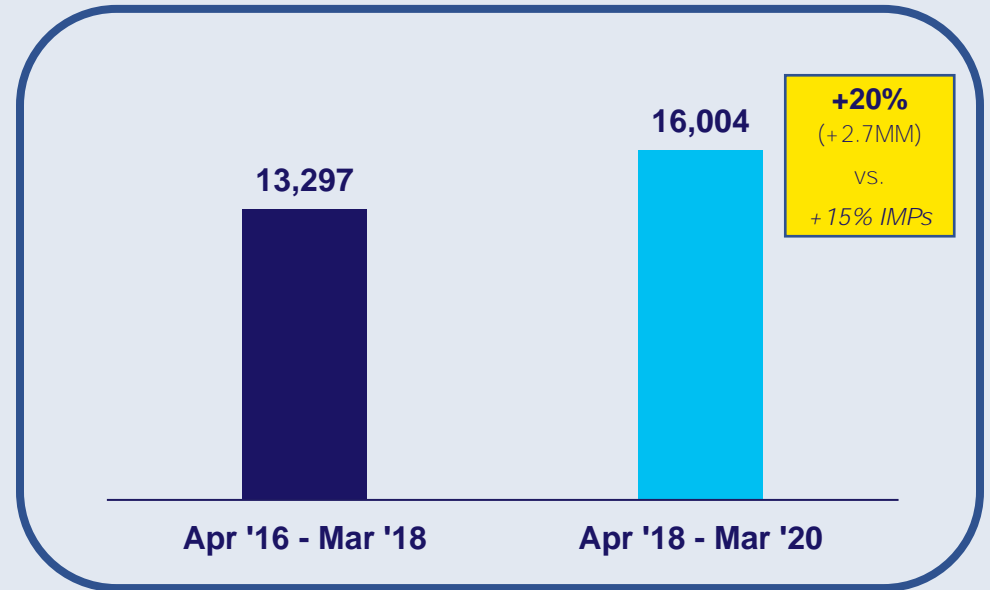
Sampling of Telco Brands By Impressions Delivery

Average Monthly Website Unique Visitors (000)
 (24-Month vs. 24-Month Comparison: Apr '16 – Mar '18 vs. Apr '18 – Mar '20)

Less than 1 Billion Average Monthly P18+ TV IMPs *Brand Average*



1+ Billion Average Monthly P18+ TV IMPs *Brand Average*



Source: VAB analysis of Nielsen Ad Intel data, telco brands within 'communications' major category, TV impressions, P18+, Live + 7 (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), April '16 – March '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data; total audience (Desktop P2+, Mobile 18+), April '16 – March '20 (calendar months).

Key takeaways for marketers

This analysis provides additional proof points of TV's ability to drive business outcomes for brands across categories



Brands that increase their TV impressions, and see an increase in their category share of voice as well, witness quantifiable business outcomes from their TV investment as a result of consumer engagement and direct action taken



These quantifiable business outcomes are seen across brands of all sizes, regardless of investment level

Thank You

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