RESEARCH REPORT

Consideration of Pulse rose with the campaign, most among under-35s; customers have not followed since Wave 3



10 sections

CONTENTS

What this report covers

Did Pulse's Wave 3 campaign move its brand funnel, for whom, and why has custom not followed? Five waves of the tracker answer, with Northstar, Harbour and Mosaic alongside.

The report follows the funnel in order. The first chapter is about reach: who now knows Pulse, and who saw its advertising. The second is about consideration and preference, and who moved most. The third sets Pulse against its rivals on preference and on what people think of each network. The fourth turns to custom: who uses Pulse, who would consider it while using another network, and what keeps them there. Each chapter opens with its claim and the numbers it rests on. How the survey was done, and what it cannot tell you, are at the back.

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SUMMARY

The report in brief

Pulse brand tracker · five waves, 10,000 UK mobile users, weighted · synthetic data

Pulse ran its advertising campaign around the third wave of this tracker, and the tracker shows both what the campaign did and what it did not. It put Pulse in front of far more people. Aided awareness, the share who recognise the name when shown it, rose from 57% in Wave 1 to 74% in Wave 5, and almost all of that rise came in Wave 3. Unaided awareness rose with it, from 30% to 44%. Two waves after the campaign, people still know the name.

The advertising was noticed and then faded, as advertising does. Prompted ad awareness jumped from 28% in Wave 2 to 56% in Wave 3 and has eased to 38% in Wave 5, still above where it started. Recognition of the campaign itself fell from 30% in Wave 3 to 15% in Wave 5.

The campaign also changed how many people would choose Pulse. Of everyone interviewed, 30% would now seriously consider it, against 19% in Wave 1. Among people aged 18 to 34 the share rose from 25% to 40% of everyone, and among those 35 and over from 17% to a quarter. Part of that rise is reach and part is opinion: among people aware of Pulse, consideration rose from 34% to 40%, and that rise holds once age, gender, region, contract and tenure are held equal.

Preference moved further. Pulse is now the most preferred network of a quarter of people, against 15% in Wave 1, second only to Northstar.

What did not follow is custom. Pulse's share of customers rose once, from 15% to 20%, in Wave 3, and has stayed at 20% since. Almost all of that gain sits with under-35s, 31% of whom now use Pulse against 19% in Wave 1. Among people 35 and over, preference for Pulse rose from 13% to 20%, but their use of Pulse shows no clear change.

The tracker suggests two reasons custom has not kept pace, though it cannot prove either. First, the campaign changed what people think Pulse is, not whether they trust its network: 84% of those familiar with Pulse call it innovative, but only 53% call its network reliable, against 75% for Northstar. Second, people in this market rarely move. When Northstar's customers had a bad Wave 4, their satisfaction fell from 7.65 to 6.16 out of 10, yet Northstar's customer share shows no clear change. Only a third of the people who would seriously consider Pulse use it today.

The campaign did the work a brand campaign can do: Pulse is better known, more often considered and more often preferred, and the young have moved network as well as opinion. The next gain depends on reaching people who already like Pulse at the moment they choose a network, with a reason to believe its network is as good as the one they have.

KEY FINDINGS

What we found

1 **74%**

Aided awareness of Pulse rose from 57% in Wave 1 to 74% in Wave 5, almost all of it in the campaign wave, and has held since.

Section 1, page 5

2 **56%**

Prompted ad awareness jumped to 56% in the campaign wave and has eased to 38%, still above the 27% of Wave 1.

Section 2, page 6

3 **40%**

40% of those aware of Pulse would seriously consider it in Wave 5, against 34%; counting everyone interviewed, 30%, against 19% in Wave 1.

Section 3, page 8

4 **38%**

Under-35s moved furthest: 38% of 18–34s now prefer Pulse, against 21% in Wave 1, and 40% of all 18–34s would consider it, against 25%. Among people 35 and over consideration rose from 17% to 25% of everyone.

Section 4, page 10

5 **25%**

Pulse is now the most preferred network of 25% of people, second to Northstar, whose share fell from 47% to 42%.

Section 6, page 13

6 **84%**

Innovative applies to Pulse for 84% of those familiar with it, but a reliable network for only 53%, against 75% for Northstar.

Section 7, page 14

7 **20%**

Pulse's customer share rose from 15% to 20% in Wave 3 and has not moved since; the gain sits with under-35s, 19% to 31%.

Section 8, page 16

8 **33%**

Only 33% of people who would consider Pulse already use it; the largest group of the rest are Northstar customers.

Section 9, page 17

01

CHAPTER 1

The campaign put Pulse in front of far more people, and they still know it

Awareness rose with the campaign and has held; the advertising was noticed, most by the young, and then faded.

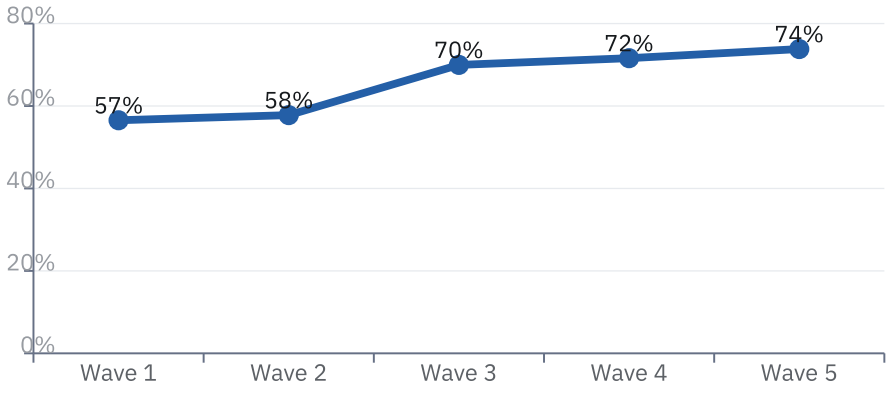
74% 74% recognise Pulse in Wave 5, up from 57% in Wave 1.

56% 56% said they had seen Pulse advertising in the campaign wave.

01 / FINDINGS

Aided awareness of Pulse rose from 57% to 74%, almost all of it in the campaign wave

More people know the name. Before the campaign, 57% of people recognised Pulse when shown its name, and the share was much the same in Wave 2. In Wave 3, the wave the campaign ran around, it rose to 70%. It has edged up in each wave since and stands at 74% in Wave 5. That is a real rise of 17% pts over the five waves, and the largest of Pulse's gains on any measure in this report.



Aided awareness: Pulse · by Tracking wave · All respondents · Weighted · 2,000 valid answers · Effective n 1,809 to 1,957
Prior wave, 95%, Holm correction

Unaided awareness, the harder test, moved the same way. Asked to name the mobile networks they know without a list, 30% named Pulse in Wave 1. From Wave 3 on, the share has been 44% or 45% in every wave. The two measures rose in the same wave and stayed up together. That is the pattern a campaign that reaches people leaves behind: more people recognise the brand when they see it, and more bring it to mind on their own.

DEFINITION

Aided and unaided awareness

Unaided awareness is the share who name Pulse when asked which mobile networks they know, with no list in front of them. Aided awareness is the share who say they know Pulse when shown its name. Both are shares of everyone interviewed in the wave, about 2,000 people each time.

Rivals stood still. Aided awareness of Harbour was 79% in both the first and the last wave, and Mosaic's moved little, to 76%. Northstar, the best-known network, is recognised by 93% in Wave 5. Shown the names, people still recognise Harbour and Mosaic more often than Pulse. Unprompted, the order changes: in Wave 5, 44% name Pulse without a list, more than name Harbour or Mosaic. Pulse is now the second network people think of, after Northstar.

The rise reached every age. Among people aged 18 to 34, aided awareness rose from 57% to 75%, and the two older groups rose by about the same amount. Held equal for age, gender, region, contract and tenure, the gain between Wave 1 and Wave 5 is still about 17% pts. The rise is in what people know, not a change in who was interviewed.

Awareness that holds two waves after the advertising has eased is worth more than a peak that falls back. The campaign did not only rent attention for a wave; it left a larger pool of people for whom Pulse is a known option the next time they choose a network. The size of that pool matters for everything that follows, because consideration, familiarity and image are all asked of people who already know the brand.

What awareness cannot show is what people think of Pulse once they recognise it. Recognising a name is the first step of the brand funnel, and the rest of this report follows people down it: whether those who now know Pulse would consider it, prefer it and, in the end, use it.

02 / FINDINGS

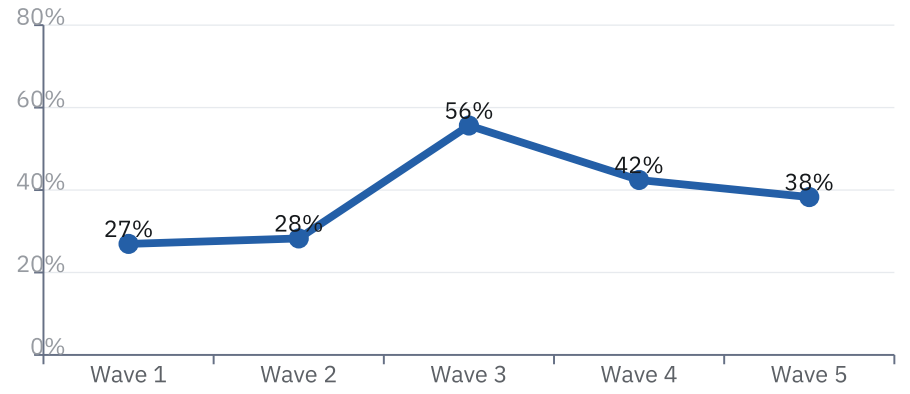
Ad awareness jumped with the campaign and has eased back, but not to where it started

56%
said they had seen Pulse advertising in the campaign wave

38%
still say so in Wave 5

15%
recognise the campaign itself in Wave 5

The campaign was seen. Before it, a little over a quarter of people said they had seen advertising for Pulse when prompted. In Wave 3 the share doubled, to 56%. It has eased in each wave since and reads 38% in Wave 5, still a real difference from Wave 1. Advertising for Harbour and Mosaic was noticed by about the same share in every wave.



Prompted ad awareness: Pulse · by Tracking wave · All respondents · Weighted · 2,000 valid answers · Effective n 1,809 to 1,957
Prior wave, 95%, Holm correction

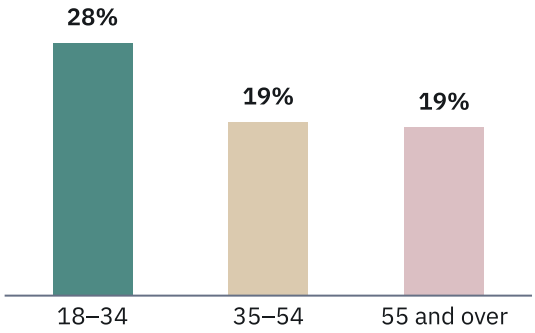
Recognition of the campaign itself tells the same story more sharply. Asked from Wave 3 on whether they recognised the campaign, 30% said yes while it ran; by Wave 5 the share had halved, to 15%. Memory of one campaign fades faster than a general sense that a brand advertises. Fewer people now recognise the campaign, but more than before still say they see Pulse advertising.

The young noticed it most. Across the three waves that asked, 28% of people aged 18 to 34 recognised the campaign, against 19% in each of the two older groups, a real difference. Prompted ad awareness in the campaign wave shows a smaller gap: 59% of 18–34s against 52% of those 55 and over. Older people were a little less likely to say they had seen Pulse advertise, and much less likely to recognise the campaign itself when it was shown to them.

Recognising the campaign goes with considering Pulse. Among people aware of Pulse in Waves 3 to 5, 44% of those who recognised the campaign would seriously consider Pulse, against 39% of everyone else, a real difference. It is not proof that the campaign persuaded them. People already warm to a brand notice its advertising more, and a survey cannot separate the two.

Prompted ad awareness is a broad measure: it counts anyone who believes they have seen Pulse advertise, and people often credit a brand with advertising they saw for another. Its rise and fall in step with the campaign says it is tracking the campaign here, but its level should not be read as the campaign's reach. Recognition of the campaign is the narrower measure and the better guide to how many people the campaign itself reached: about three in ten while it ran.

Asked from Wave 3



Recognise Pulse campaign · by Age band · Asked from Wave 3 · Weighted · 1,881 to 2,185 valid answers · Effective n 1,810 to 2,115
Each group against the rest, 95%, Holm correction

02

CHAPTER 2

More people would now consider Pulse, the young most of all

Consideration rose in both age groups, most among under-35s; familiarity and most of the image did not move.

40% 40% of those aware of Pulse would seriously consider it in Wave 5; of everyone interviewed, 30%, against 19% in Wave 1.

38% 38% of 18–34s name Pulse as their most preferred network, up from 21%.

03 / FINDINGS

30% of everyone would now consider Pulse, against 19% before the campaign

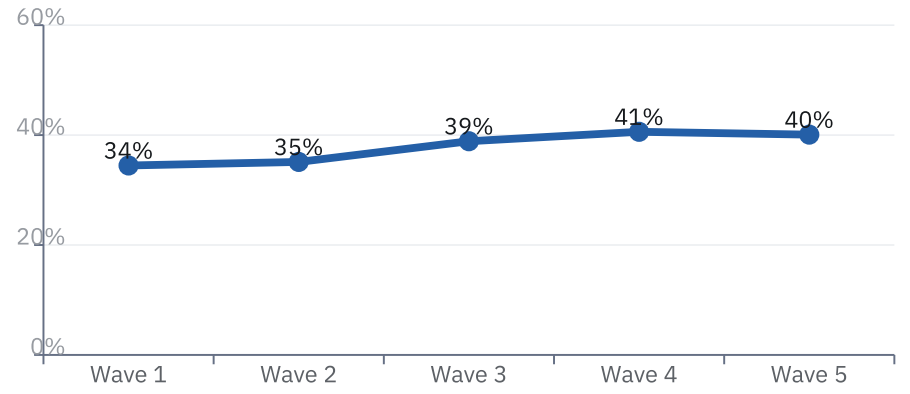
More people would consider Pulse. The question is asked only of people aware of Pulse. Counting everyone else as not considering it, 19% of everyone interviewed would seriously consider Pulse in Wave 1. In Wave 3 the share was 27%, and by Wave 5 it was 30%: against Wave 1 a real difference, and between Wave 3 and Wave 5 no clear change. The gain came with the campaign and has stayed.

HOW THIS WAS MEASURED

Who is asked about consideration

Would seriously consider is asked only of people aware of each brand: 1,480 people in Wave 5. This report gives it two ways. As a share of everyone, it counts people unaware of Pulse as not considering it, so it moves with reach and opinion together. As a share of those aware, it shows whether the people who know Pulse think more of it. Each sentence says which it is.

Among people aware of Pulse, the people the question is put to, the share was 34% in Wave 1, 39% in Wave 3 and about 40% since. Against Wave 1 that too is a real difference, so the gain is not only more people knowing the name.



Would seriously consider: Pulse · by Tracking wave · Those aware of Pulse · Weighted · 1,129 to 1,480 valid answers · Effective n 1,094 to 1,446
Prior wave, 95%, Holm correction

Two things moved at once, and they multiply. More people now know Pulse, and a larger share of those who know it would consider it. The drawing follows the people interviewed in Wave 5 down the first two steps of the funnel: 74% recognise Pulse, and 40% of those would seriously consider it. Each bar narrows to the share of everyone interviewed who reach that step, so the last bar is the 30% of all adults in the market who would now consider Pulse. In Wave 1 the same two steps read 57% and 34%.

From knowing Pulse to considering it, Wave 5



Each step is a share of those at the step before; the bars narrow to the share of everyone interviewed, about 30% at the last step. Weighted, Wave 5.

The rise is in people's views, not in who answered. Wave 3 interviewed more people aged 18 to 34 than the other waves before weighting, and the young are far more open to Pulse. Each wave is weighted to the same age profile, so the figures already allow for that. Held equal for age, gender, region, contract and tenure as well, consideration among those aware of Pulse is still +5.6% pts higher in Wave 5 than in Wave 1, a real difference.

The rise among those aware matters more than its size suggests. The pool of people aware of Pulse is larger in Wave 5 and now includes many who have only lately come to know the name. That they consider Pulse at a higher rate than the smaller pool of Wave 1 is a sign that the campaign brought in people open to the brand, not only names on a list.

Rivals' consideration did not move in the same way. Among people aware of each brand, Northstar's consideration was 49% in Wave 1 and 48% in Wave 5, Harbour's 32% and 30%, and Mosaic's 34% at both ends. Pulse is the only one of the four networks whose consideration is higher in Wave 5 than in Wave 1, and it has about halved its gap with Northstar among the people who know each brand.

For Pulse, consideration is the measure that carried the campaign furthest down the funnel and kept it there. The questions the rest of this report asks are who moved, and why so few of them have yet moved network.

Consideration rose most among under-35s, and age matters more than contract or tenure

The young moved furthest. Of everyone aged 18 to 34, the share who would seriously consider Pulse rose from 25% in Wave 1 to 40% in Wave 5. Among people 35 and over it rose from 17% to a quarter. Both rises are real, and the young's is nearly twice the size. The two groups moved for different reasons. Among 18–34s who know Pulse, consideration rose from 44% to 54%, a real difference; among those 35 and over who know it, from 31% to 35%, which is no clear change. Older people's rise came from more of them knowing Pulse; the young's came from that and from more of those who know it thinking well of it.

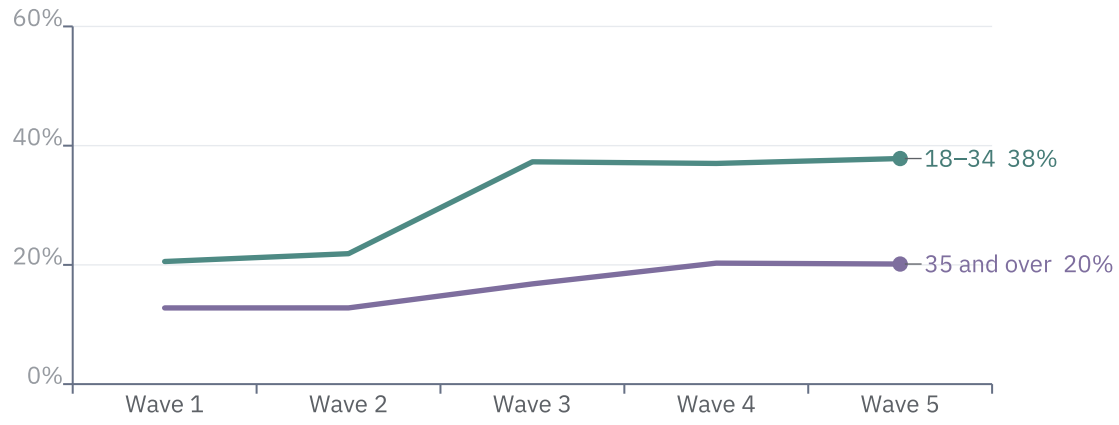
38%

of 18–34s name Pulse as their most preferred network in Wave 5

20%

of people 35 and over do so

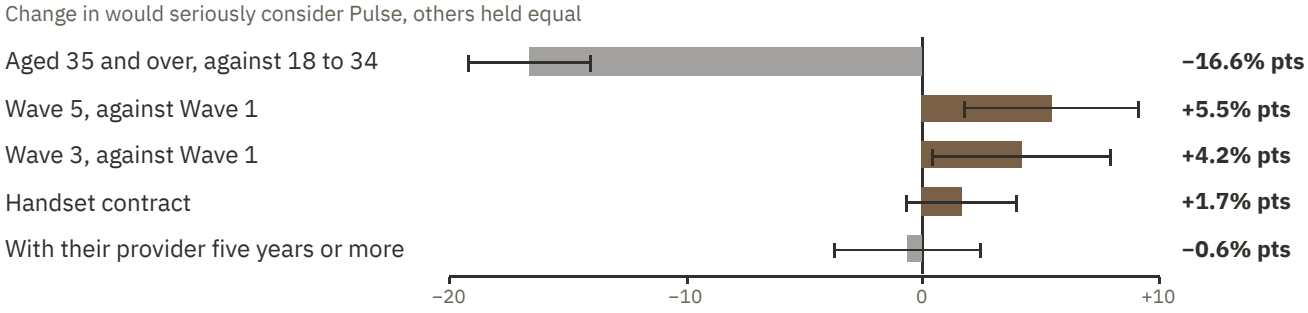
Preference shows the same pattern more strongly. Among 18–34s, the share naming Pulse as their most preferred network rose from 21% to 38%, and the step came in Wave 3. Among those 35 and over, preference rose too, from 13% to 20%: a real difference, but less than half the size.



Most preferred brand · by Tracking wave within Age band · All respondents · Weighted · 536 to 10,000 valid answers · Effective n 519 to 9,612
Pairwise, 95%, Holm correction

Age matters more than anything else measured about people. In a model of consideration among those aware of Pulse that holds the others equal, being 35 or over goes with a share 16.6% pts lower than being 18 to 34. Being interviewed in Wave 5 rather than Wave 1 goes with a share 5.5% pts higher. Having a handset contract, or having been with a provider for five years or more, makes no clear difference.

What goes with considering Pulse, others held equal



Differences from a weighted linear model of people aware of Pulse across the five waves; each holds the others equal. It shows what goes together, not what causes what.

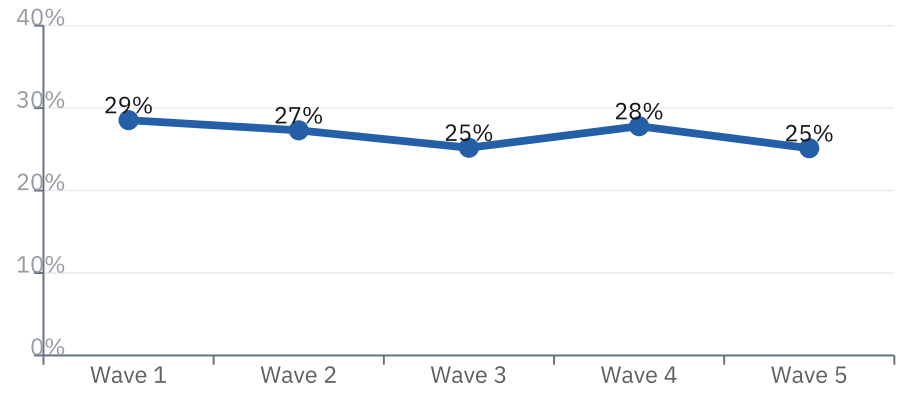
That null is worth stating, because contract and tenure are where a mobile brief usually looks first. In Wave 5, 42% of people on a handset contract who know Pulse would consider it, against 39% on SIM-only and 39% on pay as you go: no clear difference. By tenure, consideration reads 42% among people with their provider for under a year and 35% among those with it five years or more, a gap the test does not confirm and the model does not find once age is held equal. Who considers Pulse is a question of age, not of how people are tied to their network.

For targeting, the finding is plain. Under-35s are where the campaign worked hardest, and where the next gain is nearest, because more than half of those who know Pulse already consider it. People 35 and over are the larger group and the harder one. The campaign raised how many of them would consider Pulse by making it known to them, not by changing the minds of those who already knew it.

05 / FINDINGS

Familiarity and most of Pulse's image stayed where they were; only innovative rose

People know the name, not much more. Of those aware of Pulse, the share who say they know it well was 29% in Wave 1 and 25% in Wave 5, with no clear change in any wave. The pool of people aware of Pulse is larger, and the share of that pool who know Pulse well stayed where it was. The campaign added people who recognise Pulse without adding to the share who know it well.



Familiar [T2B] - Pulse · by Tracking wave · All respondents · Weighted · 1,129 to 1,480 valid answers · Effective n 1,094 to 1,446
Prior wave, 95%, Holm correction

The campaign added people who recognise Pulse without adding to the share who know it well.

One image statement moved. Among those familiar with Pulse, 74% said in Wave 1 that it was innovative. By Wave 4 the share was 85%, and in Wave 5 it is 84%. Every other statement held still. A reliable network applied for 54% in Wave 1 and 53% in Wave 5. A brand I trust applied for 54% in both waves. Good value for money read 65% and 66%.

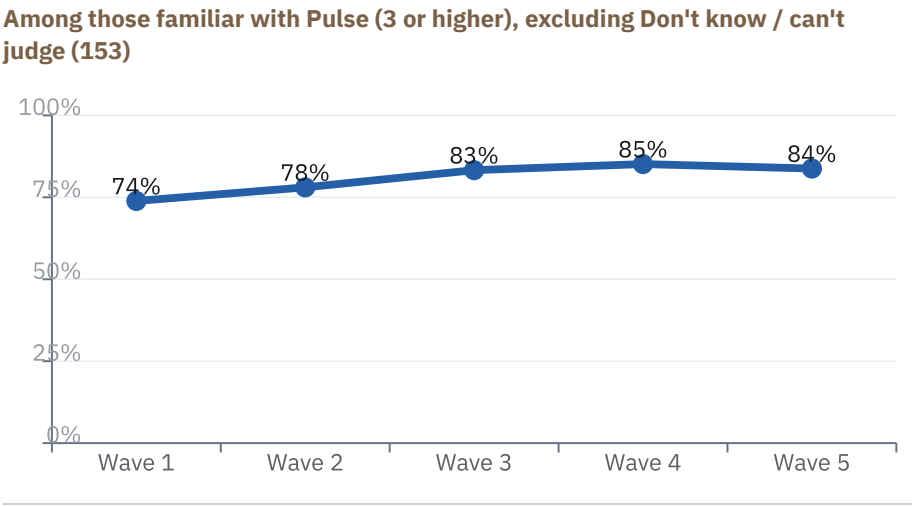


Image: Pulse — Innovative · by Tracking wave · Those familiar with Pulse (3 or higher), excluding Don't know / can't judge (153) · Weighted · 774 to 997 valid answers · Effective n 750 to 974
Prior wave, 95%, Holm correction

The campaign told people Pulse is new, and they heard it. What it did not change is the view of whether Pulse's network works and whether the brand can be trusted, the two statements on which Pulse sits furthest behind Northstar. A campaign can tell people that a brand is innovative. It is harder for one to show that a network is reliable, which people judge from their own phones and from what others tell them.

That leaves a tension for Pulse. Innovative is the statement on which it leads every rival, and the one that rose. But people who prefer Pulse give other reasons first. Among them, 26% name price as their main reason and 20% network quality, against 14% who name innovation. Being seen as innovative goes with the image the campaign built; it is not the main reason people give for preferring the brand.

Familiarity is also where Pulse's funnel narrows most. It tends to build through use and word of mouth over longer than five waves, so a flat figure two waves after a campaign is no surprise. It does mean that much of Pulse's new reach is shallow: people who would recognise the name in a shop but could say little about the network behind it.

Good value for money and for people like me held at about two in three over the five waves. Pulse's image already stood well on both before the campaign, and the campaign did not move them.

The gap between being seen as new and being seen as dependable is where the rest of this report finds the clearest reason that custom has not followed.

03

CHAPTER 3

Pulse is now a clear second to Northstar, admired for new ideas more than for its network

Pulse took preference from Northstar and Harbour, and trails them on whether its network works.

25% 25% name Pulse as their most preferred network, up from 15%.

84% 84% of those familiar with Pulse call it innovative in Wave 5.

06 / FINDINGS

Pulse is a clear second to Northstar on preference, and the gap has narrowed

25%
name Pulse as their most preferred network in Wave 5

15%
named Pulse in Wave 1

42%
name Northstar in Wave 5

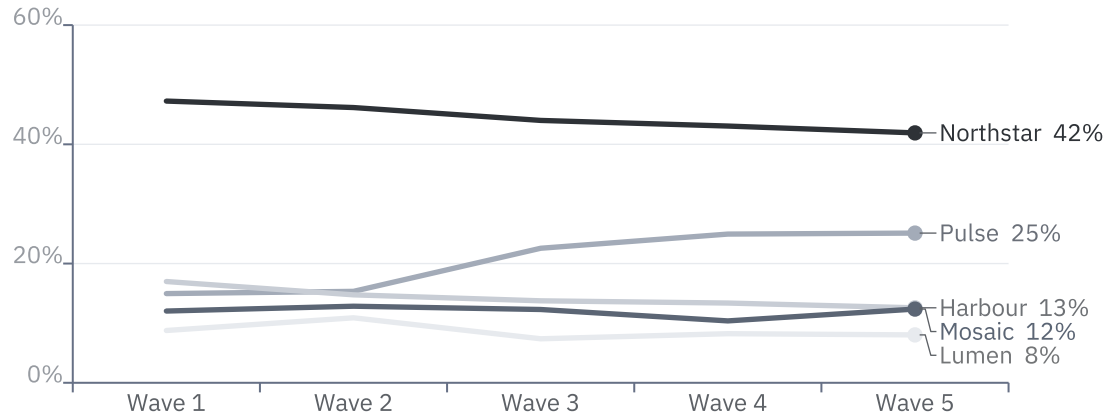
Pulse has taken preference from Northstar and Harbour. Between Wave 1 and Wave 5, the share of people naming Pulse as their most preferred network rose from 15% to 25%. Northstar's fell from 47% to 42% and Harbour's from 17% to 13%. Each of those three changes is a real difference. Mosaic and Lumen show no clear change.

The step came in Wave 3, when Pulse's preference share went from 15% to 23%, and it has edged up since. Northstar's and Harbour's shares have slipped a point or so at a time, with no single step large enough to call real on its own.

Second to Northstar. On unaided awareness, consideration, preference and use, Pulse now stands second to Northstar among the four networks this report follows. Northstar is preferred by 42% and used by 32%; Pulse by 25% and 20%. Harbour, which more people recognise than Pulse, is preferred by 13% and used by 16%. Among people aware of each brand, 48% would consider Northstar and 40% Pulse.

Harbour's position deserves a watch in the next wave. Its share of customers among 18–34s fell from 12% in Wave 1 to 7% in Wave 5, a real difference, and it sits alongside Harbour's falling preference and the lowest customer satisfaction of the five networks. It suggests that some of Pulse's young customers

may have come from Harbour, though the tracker does not ask people which network they left.



Most preferred brand · by Tracking wave · All respondents · Weighted · 2,000 valid answers · Effective n 1,809 to 1,957
Prior wave, 95%, Holm correction

Pulse gained more preference than it gained custom. Its share of people preferring it rose by 10% pts over the five waves; its share of customers rose by 5% pts. That gap, between the people who would choose Pulse and the people who have, is the subject of the last chapter.

Preference is a single choice, so one brand's gain is always another's loss. What it shows is where the campaign moved opinion: towards Pulse, and away from the two networks with the most to lose. The next chapter asks whether those who changed their preference also changed their network, and finds that most did not.

07 / FINDINGS

Pulse leads on innovation and trails Northstar on a reliable network and trust

Each network is known for something. Among people familiar with each brand in Wave 5, innovative applies to Pulse for 84%, the highest figure any network has on any statement. Pulse is also often called a brand for people like me (67%) and good value for money (66%). Northstar is called a reliable network by 75% and a brand I trust by 70%. Mosaic's highest figure is good value for money (71%), and Lumen's is premium (76%).

75%

Northstar

Image: Reliable network

Pulse's weakest statements are about whether the network works. A reliable network applies to Pulse for 53% of those familiar with it. For Northstar the figure is 75% and for Mosaic 61%. A brand I trust applies to Pulse for 54%, against 70% for Northstar. Reliability and trust are the two statements on which Pulse sits furthest behind the market leader.

The gap is not across the board. On good customer service Pulse and Northstar are level, at 59% each, and on good value for money Pulse is ahead, 66% against 54%. It is concentrated in the two statements about whether the network itself can be relied on, and whether the brand can be trusted to deliver it. Northstar's own pattern is the reverse of Pulse's: it leads on a reliable network and on trust, and is called innovative by only 55% of those familiar with it.

The other networks each hold a statement of their own. Mosaic is the value network: good value for money applies to it for 71% of those familiar with it, the highest of the five, and it sits in the middle of the

table on everything else. Lumen is the premium network, at 76%, and is also called innovative by 70%, the closest any rival comes to Pulse on that statement. Harbour has no clear strength. Its highest figures, around 60%, are for a reliable network and customer service, and only 41% call it innovative, the lowest figure in the table. Pulse's position is distinct from all four, which is an asset for a challenger. The question the rest of this report asks is whether innovative is a position that wins customers.

These positions held through the campaign. Pulse's reliable-network figure was 54% in Wave 1 and 53% in Wave 5. Northstar's fell from 79% to 68% in Wave 4, when its customers reported more network problems, and recovered to 75% in Wave 5. At its lowest point it was still well above Pulse's figure in the same wave.

The reliability gap is there even among people open to Pulse. Of those who would seriously consider Pulse, 55% call its network reliable, against 52% of others asked: no clear difference. Considering Pulse does not, it seems, mean believing its network matches the one people already have. For a considerer, switching would mean trading a network they trust for one they find more interesting.

That trade is the core of Pulse's position. Being seen as innovative helps a challenger when people are ready to try something new. A mobile network is used every day, though, and people content with the one they have may need a reason to believe a new one will work as well before they move. Pulse's campaign gave people the first kind of reason and not the second.

This suggests where the next message should go. The campaign showed that people take in what a brand says about itself: innovative rose from about three in four to more than eight in ten of those familiar with Pulse. Reliability is harder to claim, but it is the statement on which the people Pulse most needs to win, Northstar's customers, rate their own network highest.

Image	Northstar	Pulse	Mosaic	Lumen	Harbour
Reliable network	75%	53%	61%	66%	60%
A brand I trust	70%	54%	59%	62%	58%
Good customer service	59%	59%	62%	63%	61%
Innovative	55%	84%	51%	70%	41%
Good value for money	54%	66%	71%	45%	57%
For people like me	57%	67%	62%	54%	51%
Premium	57%	50%	46%	76%	45%
Environmentally responsible	50%	57%	53%	59%	49%
Base (unweighted n)	1,405	1,001	1,042	754	1,059

SHADED BY SHARE 41% 84%

Image · by Image · Tracking wave: Wave 5, excluding Don't know / can't judge (20 to 58 per item) · Weighted · 748 to 1,459 valid answers · Effective n 734 to 1,427

04

CHAPTER 4

Customers followed among the young in Wave 3, and nowhere since

Custom rose once, among under-35s, and has not moved while opinion held its gains.

20% 20% of people use Pulse in Wave 5, the same as in Wave 3.

33% 33% of those who would consider Pulse already use it.

08 / FINDINGS

Pulse's customer share rose to 20% in Wave 3 and has not moved since

20%
of all respondents use Pulse in Wave 5

31%
of 18–34s use Pulse in Wave 5

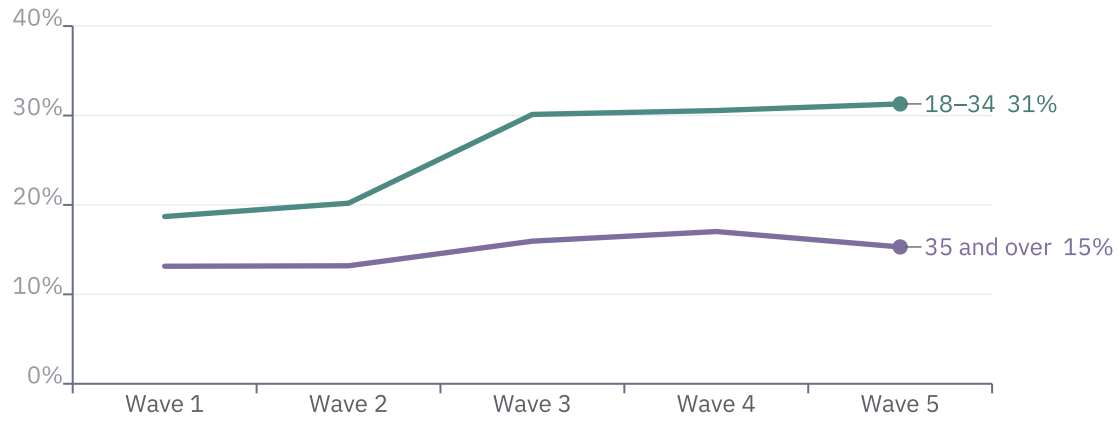
15%
of people 35 and over use Pulse in Wave 5

Custom moved once. In Waves 1 and 2, 15% of people named Pulse as their current mobile provider. From Wave 3 on the share has been 20% or 21%. The rise from Wave 1 to Wave 5 is a real difference and holds with age held equal; between Wave 3 and Wave 5 there is no change at all.

Almost all of the gain sits with under-35s. Among 18–34s, 19% used Pulse in Wave 1 and 31% in Wave 5, a real difference, with the step in Wave 3. Among those 35 and over, 13% used Pulse in Wave 1 and 15% in Wave 5, which is no clear change.

This is where opinion and behaviour part. Among people 35 and over, preference for Pulse rose by 7% pts, a real difference, while their use of Pulse shows no clear change. Among 18–34s, preference and custom rose together, and both stepped up in Wave 3. The young changed their view of Pulse and their network in the same wave; older people changed their view and stayed where they were.

The gain has not built since. With age held equal, Pulse's customer share is between 5% pts and 6% pts above Wave 1 in each of Waves 3, 4 and 5. Consideration among those aware of Pulse has held at around 40% for three waves, and preference at around a quarter. If those gains were turning into custom slowly, the tracker would show Pulse's customer share edging up after Wave 3. It does not.



Current provider · by Tracking wave within Age band · All respondents · Weighted · 536 to 10,000 valid answers · Effective n 519 to 9,612
Pairwise, 95%, Holm correction

> **The young changed their view of Pulse and their network in the same wave; older people changed their view and stayed where they were.**

Where Pulse's young customers came from, the tracker cannot say directly. Among 18–34s, Harbour's customer share fell from 12% to 7%, a real difference, and Northstar's reads 33% in Wave 1 and 29% in Wave 5, which is no clear change. That fits Pulse drawing young customers from Harbour, and perhaps from Northstar, but a survey of current providers cannot trace who moved from where.

Current provider counts the stock of customers, not switching itself. The tracker does not ask who changed network, when, or from which network, and a steady share could hide people joining and leaving Pulse in equal numbers. What it does show is that Pulse's net position has not moved for three waves while its standing in the funnel above it has held its gains.

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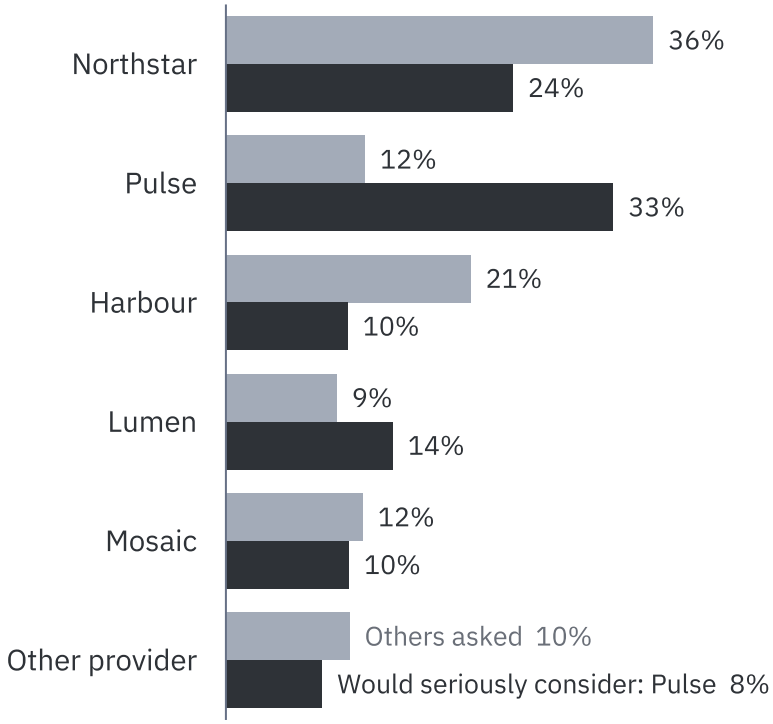
A third of those who would consider Pulse already use it; the largest group of the rest are with Northstar

The people Pulse needs are with other networks. In Wave 5, 33% of people who would seriously consider Pulse already use it. The largest group of the rest are Northstar customers, at 24% of considerers; 14% use Lumen, 10% Harbour and 10% Mosaic. Among people aware of Pulse who would not consider it, 36% use Northstar and 21% Harbour.



Current provider · by Would seriously consider: Pulse · Tracking wave: Wave 5 · Weighted · 585 to 895 valid answers · Effective n 570 to 876
Each group against the rest, 95%, Holm correction

One in three people who would consider Pulse already use it



One in three

Use Pulse now, among those who would seriously consider it

33% of 585

People aware of Pulse who would seriously consider it, Wave 5, weighted.

Northstar's customers are the largest group Pulse could still win, and the hardest. They are with the network that people familiar with it rate highest on a reliable network (75%) and on trust (70%). Pulse's own campaign moved its image on innovation, and left untouched the two statements on which those customers' current network is strongest.

Pulse's customers look like the market. In Wave 5, 43% of Pulse customers are on a handset contract, 38% on SIM-only and 16% on pay as you go. One in five (20%) has been with Pulse for under a year, the same share as among everyone interviewed, and 37% for one to two years. Pulse is not winning customers on different terms from the market as a whole; it is winning a larger share of the young.

Pulse's customers are about as satisfied as Northstar's. Their average satisfaction with their provider is 7.20 out of 10 in Wave 5, against 7.14 for Northstar's customers, which is no clear difference. Lumen's customers are the most satisfied, at 7.80, and Harbour's the least, at 6.82. Harbour's customers are the one group whose satisfaction gives them a reason to look around.

For Pulse the size of the prize is plain. A large group of people now consider it and do not use it. Converting them means competing with networks whose customers are, on average, about as satisfied as Pulse's own customers are with Pulse, and whose networks they rate as more reliable than Pulse's.

The survey cannot say how many of them will reach a point of choosing a network in the next year.

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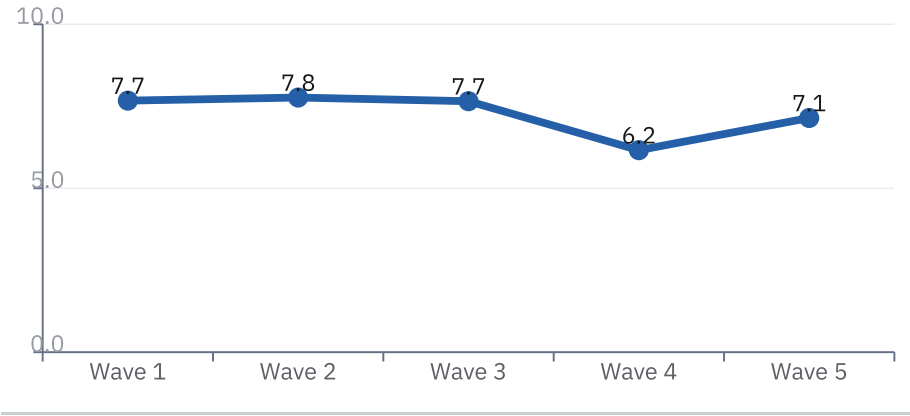
Even a rival's bad wave did not move customers between networks

Northstar's customers had a bad Wave 4 and stayed. Northstar's customers rated their satisfaction with their provider 7.65 out of 10 on average in Wave 3. In Wave 4 the average fell to 6.16, a real difference. Among people familiar with Northstar, the share calling its network reliable fell from 79% to 68% in the same wave. In Wave 5 satisfaction recovered to 7.14, still below its level in the first three waves.



Overall satisfaction with current provider (0-10) · by Tracking wave · Current provider: Northstar · Weighted · 612 to 660 valid answers · Effective n 566 to 644 Prior wave, 95%, Holm correction

Northstar's share of customers over the same waves was 32% in Wave 3, 30% in Wave 4 and 32% in Wave 5, with no clear change in any wave. Its customers were markedly less satisfied for a wave, and the tracker shows no sign that they left in numbers it can detect. Pulse, the obvious beneficiary of a rival's bad wave, held at 21% of customers in Wave 4 and 20% in Wave 5.

People in this market rarely move. The tracker cannot show what holds people where they are: contracts that have not ended, the effort of moving a number, or simple habit. It does show that neither a rival's bad wave nor a rise in Pulse's own standing changed customer shares after Wave 3. Whatever keeps people with their network held through both.

The young are the exception, and the one place custom followed opinion. Their consideration, preference and use of Pulse all rose between Wave 1 and Wave 5, their preference and use stepped up in Wave 3, and they were the group most likely to recognise the campaign. Under-35s were already Pulse's strongest group before the campaign, and they are the group the campaign moved furthest on every measure from awareness to use.

> **Whatever keeps people with their network held through both.**

Satisfaction moves faster than custom. Harbour's customers are the least satisfied of the five networks in Wave 5, and Harbour's customer share has drifted from 18% to 16% over the five waves, a change too small to call real. When satisfaction moves custom at all, it seems to do so slowly, over more waves than this tracker has run.

For Pulse that cuts both ways. Its own customers are about as satisfied as Northstar's, so they too are unlikely to leave, and the fifth of the market it holds is a stable base. But it also means Pulse cannot count on a rival's troubles to bring customers to it. It has to win them at the moment they choose.

What follows for Pulse is not a verdict on the campaign, which did what brand advertising can do: it made Pulse better known, more often considered and more often preferred, and it held those gains for two waves. It is a question for the next phase. How can Pulse reach the people who now prefer or consider it at the moment they choose a network, and how can it answer the doubt about its network that the campaign left in place?

SUMMARY

Conclusions

The campaign did what a brand campaign can do. More people recognise Pulse than before it, more people would consider it, 30% of everyone against 19%, and more people name it as the network they prefer. Each of those gains came in the campaign wave and has held for two waves since, after the advertising itself had faded from memory.

Among under-35s the campaign did more. Their use of Pulse rose in the same wave as their opinion of it, and almost one in three of them now uses Pulse. Among people 35 and over, opinion moved and custom did not: more of them prefer Pulse than before, but no more of them use it.

That leaves Pulse with a large group of people who like it and use another network. Most of them are with Northstar, a network they rate as more reliable than Pulse, and whose customers are about as satisfied as Pulse's own. The tracker gives them little reason to move today, and Northstar's bad Wave 4 suggests that even a reason does not, by itself, move them.

Three things follow for the next phase. The first is to keep what the campaign built. Awareness and preference that have held for two waves are an asset, and the campaign showed that people take in what Pulse says about itself.

The second is to answer the doubt the campaign left in place. Pulse's weakest statements are about whether its network works, and they are the statements on which the people it most needs to win rate their own network highest. A message about the network, backed by something people can check, would speak to that doubt in a way a message about new ideas cannot.

The third is timing. People change network when a contract ends or something goes wrong, and the tracker does not yet ask when that is. Adding that question would show how many of the people who now prefer Pulse will choose a network in the coming year, and let Pulse reach them then.

The next waves will show whether the gain among the young spreads to older people, or whether Pulse's customer share settles at a fifth of the market.

METHOD

How we did this

Pulse's brand tracker interviewed 2,000 people in each of five waves, 10,000 in all. Each wave is weighted on its own to the same profile, so the waves can be compared: after weighting, the age profile is the same in every wave. Wave 3 held more people aged 18 to 34 before weighting than the other waves, and the weight brings them back to the same share as in the rest.

Awareness, advertising awareness, preference and current provider are asked of everyone. Would seriously consider is asked of people aware of each brand. The report gives it as a share of everyone interviewed, counting those unaware of Pulse as not considering it, and as a share of those aware of Pulse; each sentence says which. Familiarity is asked of people aware of each brand, and the image statements of those familiar with it (3 or higher on the familiarity scale). Recognition of the Pulse campaign was asked from Wave 3 on. Satisfaction is asked of customers of the five named networks.

Differences called real are significant at the 95% level, with a Holm correction for the number of comparisons in each table. A difference that does not pass is called no clear difference. Differences with other things held equal come from weighted linear models of each outcome on wave, age and the other profile questions named; they show what goes together, not what causes what. A gap between two percentages is written in % pts: 40% against 34% is a gap of 6% pts.

The study is a synthetic tracker made to test Velocity: Pulse, Northstar, Harbour, Mosaic and Lumen are fictitious, and so are the figures.

There are three things this survey cannot tell you. The tracker cannot show that the campaign caused what moved. It ran in the same wave as the rises in awareness, consideration, preference and custom, and nothing else in the survey explains them, but there is no comparison group that did not see the campaign. The link between recognising the campaign and considering Pulse may run either way: people warm to a brand notice its advertising more.

It cannot show switching itself. Current provider counts each network's customers at each wave; it does not say who changed network, when, from which network or why. A steady share could hide equal numbers joining and leaving. A question on recent switching, and on when each person's contract ends, would show whether the people who now consider Pulse are near a point of choosing.

It cannot say why people who prefer Pulse have not moved to it. The gap on network reliability is the clearest difference the tracker shows between Pulse and the networks those people use, but the survey does not ask what would make them switch. A follow-up among considerers who use another network would answer that directly.