Integrated Marketing Strategy

Presented to: Frontier Communications
Agenda

• Introductions
• Campaign Objective
• Primary Research Study (Frontier vs. competition Perception)
• Who Are Your Best Prospects? (Nielsen PRIZM)
• How Will We Reach Them? (Integrated Media Plan)
• What Will We Say To Them? (Messaging)
• 2015/2016 Investment
• All Important Next Steps
Campaign Objective

Develop and execute an integrated marketing strategy that gives Frontier the best chance to gain new clients, while positioning them as the key internet provider in Rochester.
Primary Research Study
# Targets vs. Actual

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Rochester Actuals</th>
<th>Nielsen Survey Actuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>14.0%</td>
<td>7.3%</td>
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<tr>
<td>25-29</td>
<td>7.3%</td>
<td>11.0%</td>
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<tr>
<td>30-34</td>
<td>7.5%</td>
<td>8.8%</td>
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<tr>
<td>35-39</td>
<td>5.1%</td>
<td>7.3%</td>
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<tr>
<td>40-44</td>
<td>9.1%</td>
<td>7.3%</td>
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<tr>
<td>45-49</td>
<td>8.8%</td>
<td>10.3%</td>
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<tr>
<td>50-54</td>
<td>10.4%</td>
<td>9.3%</td>
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<tr>
<td>55-59</td>
<td>7.8%</td>
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<td>60-64</td>
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<tr>
<td>65+</td>
<td>20.5%</td>
<td>18.8%</td>
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Questionnaire Design

The questions focused on the following topics:

- Type of Frontier service
- Rating satisfaction with Frontier in several service areas
- Rating Frontier on a series of attributes
- Likelihood to use (in future)
- Influence of Amazon Prime
When it comes to making decisions about digital access (i.e. internet or cable) at your place of residence, which of the following best describes your role in the decision making process?
Service Provider

47.5% of respondents have experienced service with Frontier.

Q: Now we would like to ask you about some of the services you currently have at your place of residence. In the past year did you previously or do you currently use Frontier for your phone or internet service?

Base: All Respondents = 399
Q: We would like to ask you a few questions about your experience with Frontier. How long were you/have you been using Frontier services?
Q: What services did you/do you currently have with Frontier? Please select all that apply.

Base: Frontier respondents = 180

The majority of Frontier respondents have experienced High Speed Internet & Phone service.
Q: What type of internet access did you/do you have with Frontier?

Base: Frontier high speed internet (past/current) n=98

48% of people don’t know what speed they have/had with Frontier.
Satisfaction of Installation

Q: We would like to ask you a few questions about your experience with Frontier or competition. How would you rate your satisfaction with Installation?
Q: Based upon the services you receive(d) from Frontier, how would you rate them on the following attributes? Please use the scale below where 1 is ‘Poor’ and 10 is ‘Excellent’.

Base: Frontier Respondents = 136
Consumer Perceptions

Frontier is seen as less expensive, a better value and friendlier than the competition

Q: We would like to show you a series of brand attributes and ask you which ones you feel most closely identify with Frontier. Using the scale below, please rate Frontier on each of the attributes listed.
Likelihood to Use – Next Six Months

Q: How likely are you to start using Frontier internet for your residence in the next six months? Would you say?

Base: Non-Frontier Respondents = 242

5.4% Indicate they are somewhat or very likely to use Frontier in the next 6 months
Influence of Amazon Prime

**Q:** How likely is Frontier's new offer of 1 year of access to Amazon Prime with your internet service, to get you to change to Frontier for your internet service?

**Base:** Respondents who are unlikely or neither likely/unlikely to use Frontier = 229

Amazon Prime positively influenced 8.3% of people who previously indicated they were unlikely to use Frontier in the next 6 months.
Demographics

Frontier Customers tend to be slightly less affluent than the general pool of respondents.
Key Takeaways

• Men tend to be the key decision makers for phone or internet service providers.

• Respondents are more satisfied with competition’s installation service than Frontier’s.

• 48% of Frontier customers did not know what level of internet access they had.

• Frontier outranks competition in overall satisfaction.

• Respondents see Frontier as being a better value than competition for price paid.

• 5.5% of people not currently using Frontier indicate that they are somewhat or very likely to start using Frontier.

• 8.3% of people, who were not planning on using Frontier, positively changed their minds when learning about the Amazon Prime offer.
Strategic Objectives

Target and educate your **best** prospects:

1. Internet & Phone Bundle
   - Middle Class families and Affluent/middle class mature years

2. High Speed Internet
   - Middle Class Families & Lower income younger years w/o children
How Will We Do This?
(Integrated Media Plan)
The print and online version of the Democrat and Chronicle reaches 65 percent of adults weekly.
Democrat and Chronicle - Print

Targeting:
- Bundled (Internet & Phone) Users
  - middle class families
  - middle class/affluent mature years

Combining high impact ROP frequency with sticky notes to drive new (bundle) customers in Rochester.
D&C.com – Targeted Display
(Desktop & Mobile)

Targeting:
- **High Speed Internet Users**
  - middle class families
  - lower income younger years
- **Bundled (Internet & Phone) Users**
  - middle class families
  - middle class/affluent mature years
- **competition Internet Customers**

Serve 1000’s of impressions to a highly engaged target audience.

high impact ad placement served while reading articles
USA TODAY – Targeted Display

Targeting:
- High Speed Internet Users
  - middle class families
  - lower income younger years
- Bundled (Internet & Phone) Users
  - middle class families
  - middle class/affluent mature years
- competition Internet Customers

USA TODAY is the 5th most trafficked media site in the Greater Rochester Area
Pre-Roll – D&C.com and USA TODAY

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- **High Speed Internet Users**
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  - middle class families
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Divide Pre-roll impressions between D&C.com and USA TODAY.
Native Advertising

During 8 key months, become part of the news on the most highly trafficked media site in the region. Frontier will be positioned as a thought leader in the community.
Retargeting

1. User performs a search on Google, Yahoo, or Bing.
2. User is anonymously cookieed with their search term.
3. The searcher is retargeted by serving display across real-time ad exchanges and ad networks.

**Targeting:** All users interested in searching for your competitors, internet or phone service in Rochester (based on search terms, content interest, etc.)
Insider Program

Be part of our subscriber loyalty program!

Offer an exclusive deal to about 1963 ideal targets monthly (ex. $100 gift card when signing up with Frontier)

No cost to you!

Can start immediately and run through the duration of the campaign.
Other Recommendations

• Use audience segment findings when targeting on ad networks, etc.

• Include member referral language on advertising materials when appropriate.
What Will We Say To Them?
(Messaging)
Aligning Our Insights With Messaging