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Marketing Management

Measuring the Impact of Television Media Share of Voice on Consumer-Based Brand Perception

Case Study: Ooredoo Algeria

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ABSTRACT

In a context of intensified competition within the Algerian telecommunications sector, where mobile operators often offer services perceived as similar, television visibility represents an important lever for building and reinforcing brand perception.

This dissertation aims to evaluate the impact of television media Share of Voice on consumer-based brand perception of Ooredoo Algeria. More specifically, it assesses this impact through four dimensions: brand awareness, brand image, perceived quality, and brand preference among Algerian consumers.

To achieve this objective, a quantitative method based on a hypothetico-deductive approach was adopted. A structured questionnaire was initially administered to 231 Algerian consumers exposed to television advertisements by mobile operators, among which 138 valid responses were retained for statistical analysis.

This research was also enriched by a practical internship carried out at IMMAR Research & Consultancy, which allowed the researcher to observe professional practices related to audience measurement, advertising monitoring, and media visibility analysis in the Algerian market.

The collected data were processed using IBM SPSS Statistics for descriptive analysis and SmartPLS 4 for the assessment of the measurement and structural models through the PLS-SEM method. The results show that perceived television media Share of Voice has a positive and significant effect on the four studied dimensions of consumer-based brand perception.

The strongest effect concerns brand image, which indicates that Ooredoo's television visibility mainly contributes to strengthening positive brand associations in consumers' minds. Therefore, it is recommended to maintain a coherent, credible, and regular television presence, supported by messages that highlight service quality and concrete consumer benefits.

However, the limited sample size, the use of an exclusively quantitative method, and restricted access to objective or confidential media data constitute the main limitations of this research.

Keywords: Share of Voice; television advertising; Ooredoo; brand perception; SmartPLS; PLS-SEM

RÉSUMÉ

Dans un contexte de concurrence intensifiée au sein du secteur algérien des télécommunications, où les opérateurs mobiles proposent souvent des services perçus comme similaires, la visibilité télévisée constitue un levier important dans la construction et le renforcement de la perception de marque.

Ce mémoire vise à évaluer l'impact de la part de voix médiatique télévisée sur la perception de marque fondée sur le consommateur dans le cas d'Ooredoo Algérie. Plus précisément, il évalue cet impact à travers quatre dimensions : la notoriété de la marque, l'image de marque, la qualité perçue et la préférence de marque auprès des consommateurs algériens.

Pour atteindre cet objectif, une méthode quantitative fondée sur une approche hypothético-déductive a été adoptée. Un questionnaire structuré a été administré initialement à 231 consommateurs algériens exposés aux publicités télévisées des opérateurs mobiles, parmi lesquels 138 réponses valides ont été retenues pour l'analyse statistique.

Cette recherche a également été enrichie par un stage pratique réalisé au sein d'IMMAR Research & Consultancy, qui a permis d'observer les pratiques professionnelles liées à la mesure d'audience, au suivi publicitaire et à l'analyse de la visibilité médiatique dans le marché algérien.

Les données collectées ont été traitées à l'aide d'IBM SPSS Statistics pour l'analyse descriptive et de SmartPLS 4 pour l'évaluation du modèle de mesure et du modèle structurel selon la méthode PLS-SEM. Les résultats montrent que la part de voix médiatique télévisée perçue exerce un effet positif et significatif sur les quatre dimensions étudiées de la perception de marque fondée sur le consommateur.

L'effet le plus important concerne l'image de marque, ce qui indique que la visibilité télévisée d'Ooredoo contribue principalement au renforcement des associations positives liées à la marque dans l'esprit des consommateurs. Ainsi, il est recommandé de maintenir une présence télévisée cohérente, crédible et régulière, soutenue par des messages mettant en valeur la qualité du service et les bénéfices concrets pour le consommateur.

Toutefois, la taille limitée de l'échantillon, le recours à une méthode exclusivement quantitative et l'accès restreint à certaines données objectives ou confidentielles relatives aux médias constituent les principales limites de cette recherche.

ملخص

في سياق يتميز بتزايد حدة المنافسة داخل قطاع الاتصالات في الجزائر، حيث تُعد خدمات متعاملي الهاتف النقال متشابهة في نظر كثير من المستهلكين، تُشكل الرؤية التلفزيونية رافعة مهمة في بناء إدراك العلامة التجارية وتعزيزه.

تهدف هذه المذكرة إلى تقييم أثر حصة الصوت الإعلامي التلفزيوني على إدراك العلامة التجارية من منظور المستهلك في حالة Ooredoo الجزائر. وبشكل أكثر تحديدًا، تدرس هذه المذكرة هذا الأثر من خلال أربعة أبعاد: الوعي بالعلامة التجارية، صورة العلامة التجارية، الجودة المدركة، وتفضيل العلامة التجارية لدى المستهلكين الجزائريين.

لتحقيق هذا الهدف، تم اعتماد منهج كمي قائم على المقاربة الفرضية الاستنتاجية. وقد تم توزيع استبيان منظم في البداية على 231 مستهلكًا جزائريًا تعرضوا للإعلانات التلفزيونية الخاصة بمتعاملي الهاتف النقال، وتم الاحتفاظ بـ 138 إجابة صالحة للتحليل الإحصائي.

كما تم إثراء هذا البحث من خلال تربية ميداني داخل مؤسسة IMMAR Research & Consultancy، مما أتاح ملاحظة الممارسات المهنية المرتبطة بقياس الجمهور، وتتبع الإعلانات، وتحليل الرؤية الإعلامية في السوق الجزائرية.

تمت معالجة البيانات المجمعة باستخدام برنامج IBM SPSS Statistics من أجل التحليل الوصفي، وبرنامج SmartPLS 4 من أجل تقييم نموذج القياس والنموذج الهيكلي وفق طريقة PLS-SEM. وقد أظهرت النتائج أن حصة الصوت الإعلامي التلفزيوني المدركة لها أثر إيجابي ومعنوي على الأبعاد الأربعة المدروسة لإدراك العلامة التجارية من منظور المستهلك.

ويتعلق الأثر الأقوى بصورة العلامة التجارية، وهو ما يدل على أن الرؤية التلفزيونية لـ Ooredoo تساهم أساسًا في تعزيز الارتباطات الإيجابية المرتبطة بالعلامة في أذهان المستهلكين. وبناءً على ذلك، يُوصى بالحفاظ على حضور تلفزيوني متناسق وموثوق ومنظم، مدعوم برسائل تبرز جودة الخدمة والفوائد الملموسة للمستهلك.

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الكلمات المفتاحية: حصة الصوت؛ الإعلان التلفزيوني؛ Ooredoo؛ إدراك العلامة التجارية؛ SmartPLS؛ PLS-SEM

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ABSTRACT	1
LIST OF TABLES	7
LIST OF FIGURES	8
LIST OF ABBREVIATIONS	9
GENERAL INTRODUCTION	1
1.1 Research Context and Interest	2
1.2 Objectives of the Study	3
1.3 Justification of the Choice of the Topic	3
1.4 Research Problem	5
1.5 Research Hypothesis	6
1.7 Methodological Approach	8
1.8 Structure of the Dissertation	9
CHAPTER I: THEORETICAL FRAMEWORK	11
Section 1: Literature Review	12
1.1 Share of Voice	12
1.2 Consumer-Based Brand Perception, Dimensions and Link with Media Visibility	17
1.3 Link between Share of Voice and Brand Perception	19
1.4 The Telecommunications Market: Structure, Dynamics, and Media Visibility	21
Section 2: Conceptual Framework	24
2.1 Share of Voice (SOV): Definition, Measurement, and Theoretical Foundations	24
2.2 Consumer-Based Brand Perception	27
2.3 Television Advertising and Media Visibility	37
CHAPTER II: METHODOLOGICAL FRAMEWORK AND ORGANISATIONAL CONTEXT	41
Section 1: Company Presentation and Study Context	42
1.1 IMMAR Research & Consultancy	42
1.2 Presentation of Ooredoo Algeria	48
1.3 The collaboration between Immar and Ooreedo	51
Section 2: Methodology and Data of the Study	54
2.1 Research Methodology	54
2.2 Data of the Study	58
CHAPTER III: ANALYSIS AND DISCUSSION OF RESULTS	65
Section 01: Presentation of the Results	67
1.1 Data Screening and Missing-Value Treatment	67
1.2 Socio-Demographic Profile of Respondents	70
1.3 Television Exposure and Advertising Behavior	72
1.4 Descriptive Analysis of the Study Variables Based on SPSS Outputs	73
1.5 Measurement and Structural Model Assessment with SmartPLS	79
Section 2: Discussion of Results	85
2.1 The Influence of Television Share of Voice on Brand Awareness and Brand Image	86

2.2 The Influence of Television Share of Voice on Perceived Quality and Brand Preference	87
2.3 Contextual Interpretation of the Results	88
GENERAL CONCLUSION	91
1. Research Synthesis	92
2. Methodological Summary	92
3. Main Findings and Answer to the Research Problem	92
4. Contributions of the Study	93
5. Limitations of the Research	93
6. Managerial Recommendations	94
7. Future Research Perspectives	95
8. Final Statement	95
BIBLIOGRAPHY	96
APPENDICES	99

LIST OF TABLES

Table 1: The Double Jeopardy Law	26
Table 2: Key Principles of Binet and Field's Advertising Effectiveness Research	27
Table 3: Dimensions of Brand Perception (Aaker, 1991)	31
Table 4: Advantages and Disadvantages of Television Advertising	38
Table 5: IMMAR's Multi-Source Data Integration Model	45
Table 6: Main Activity Areas of IMMAR Research & ConsultancySource: Adapted from IMMAR credentials document, 2026	45
Table 7: IMMAR Client References by Sector	46
Table 8: Oreedo's Algeria key Indicators (january 2026)	48
Table 9: Structure of the questionnaire	55
Table 10: Five-point Likert scale used in the questionnaire	56
Table 11: Data analysis plan	59
Table 12: Operationalization of the constructs in the final model	61
Table 13: Methodological design of the empirical study	62
Table 14: Research hypotheses tested in the empirical model	65
Table 15: Data screening and missing-value treatment before analysis	67
Table 16: Quasi-normality assessment of the study constructs	68
Table 17: Mobile operators used by respondents	72
Table 18: Construct-level descriptive statistics	73
Table 19: Item-level descriptive statistics for Share of Voice (SOV)	74
Table 20: Item-level descriptive statistics for Brand Awareness (BA)	75
Table 21: Item-level descriptive statistics for Brand Image (BI)	76
Table 22: Item-level descriptive statistics for Perceived Quality (PQ)	77
Table 23: Item-level descriptive statistics for Brand Preference (BP)	78
Table 24: Outer loadings of measurement indicators	80
Table 25: Construct reliability and convergent validity	81
Table 26: HTMT matrix	81
Table 27: Model fit indicators reported by SmartPLS	82
Table 28: Path coefficients and hypotheses testing	83
Table 29: Explanatory power and effect size	83
Table 30: Synthesis of main and sub-hypotheses testing	84

LIST OF FIGURES

Figure 1: Conceptual model of the research	7
Figure 2: Brand association map	28
Table 3: Dimensions of Brand Perception (Aaker, 1991)	31
Figure 3: Benefit visibility and brand impact	32
Figure 4: Brands as a means of creating customer value	33
Figure 5: Brand power and brand equity	34
Figure 6: The Hierarchy-of-Effects Model	35
Figure 7: Theory of Planned Behavior	36
Figure 8: The Consumer Decision Journey	37
Figure 9: Historical Milestones of IMMAR Research & Consultancy (1998-2021)	42
Figure 10: Organizational Chart of IMMAR Research & Consultancy	43
Figure 11: Research Services Offered by IMMAR Across the Client Journey	44
Figure 12: Evolution of the Ooredoo Brand Identity (2004-2022)	49
Figure 13: Distribution of respondents by age group	69
Figure 14: Distribution of respondents by gender	70
Figure 15: Frequency of television viewing among respondents	71
Figure 16: Conceptual model issued from SmartPLS	79

LIST OF ABBREVIATIONS

Abbreviation	Meaning
3G	Third Generation Mobile Network
4G	Fourth Generation Mobile Network
5G	Fifth Generation Mobile Network
ANOVA	Analysis of Variance
ARPCÉ	Postal and Electronic Communications Regulatory Authority
AVE	Average Variance Extracted
BA	Brand Awareness
BI	Brand Image
BP	Brand Preference
CAPI	Computer-Assisted Personal Interviewing
CATI	Computer-Assisted Telephone Interviewing
CBBE	Consumer-Based Brand Equity
CBE	Consumer-Based Equity
CEO	Chief Executive Officer
CR	Composite Reliability
CRM	Customer Relationship Management
DJL	Double Jeopardy Law
EPTV	Établissement Public de Télévision
ESOV	Excess Share of Voice
f^2	Effect Size
GRP	Gross Rating Points
GSM	Global System for Mobile Communications
HSPA	High Speed Packet Access
HTMT	Heterotrait-Monotrait Ratio
IMMAR	IMMAR Research & Consultancy
KPI	Key Performance Indicator
LTE	Long Term Evolution
MENA	Middle East and North Africa
PLS	Partial Least Squares
PLS-SEM	Partial Least Squares Structural Equation Modeling
PQ	Perceived Quality
Q^2	Predictive Relevance
R^2	Coefficient of Determination
R^2 adj.	Adjusted Coefficient of Determination
ROI	Return on Investment
SEM	Structural Equation Modeling
SEO	Search Engine Optimization
SOM	Share of Market
SOV	Share of Voice
S.P.A	Société par Actions

SRMR	Standardized Root Mean Square Residual
TARP	Target Audience Rating Points
TV	Television
U&A	Usage and Attitude Study
VIF	Variance Inflation Factor
WTA	Wataniya Telecom Algérie
β	Beta Coefficient / Path Coefficient
p-value	Probability Value
ρ_A	Dijkstra-Henseler's Reliability Coefficient
t-value	Student's t Statistic

GENERAL INTRODUCTION

1.1 Research Context and Interest

The relationship between media visibility and brand perception constitutes a major strategic concern in mature telecommunications markets. In Algeria, where mobile penetration exceeds 100 percent, the three main operators—Mobilis, Djezzy, and Ooredoo—operate in a highly competitive oligopolistic market where core service offerings are perceived as largely similar. In such a saturated context, external indicators of differentiation, such as advertising pressure and media Share of Voice on television, become crucial for understanding competitive positioning and consumer brand perception.

Over the past decade, the Algerian telecommunications sector has witnessed intense promotional wars, particularly during high-audience periods such as the holy month of Ramadan. Operators invest heavily in television advertising, seeking not only to capture the audience's attention but also to dominate the media landscape. This strategic race for visibility is encapsulated in the concept of Share of Voice (SOV), which estimates a brand's relative advertising visibility relative to its competitors. While the quantitative aspect of SOV (how much is spent or how often an ad is aired is easily) tracked by specialized media monitoring agencies, the qualitative translation of this visibility into actual brand equity remains a complex and underexplored phenomenon in the local market.

This research aims to bridge this gap by evaluating the impact of television media Share of Voice on consumer-based brand perception, focusing specifically on Ooredoo Algeria. As a major player known for its dynamic communication strategies and high-quality television campaigns, Ooredoo provides an ideal case study. By narrowing the scope to a single operator, the study allows for an in-depth, nuanced analysis of how television-based visibility translates into consumer perceptions across four key dimensions based on Keller's theoretical framework: brand awareness, brand image, perceived quality, and brand preference. Understanding this relationship is critical, as it reveals whether dominating the television screens effectively translates into dominating the consumer's mind.

1.2 Objectives of the Study

This study aims to achieve the following objectives, which are intended to clarify the role of television media Share of Voice in shaping consumer-based brand perception of Ooredoo Algeria:

- Understand how television media Share of Voice influences the perception of Ooredoo among Algerian consumers, particularly through brand awareness, brand image, perceived quality, and brand preference.
- Explore the relevance of television Share of Voice in the era of digitalization, by questioning whether being more visible on television still helps a brand not only to be seen, but also to be remembered, positively perceived, and eventually preferred.
- Contribute to a research area that remains relatively underexplored, since few studies focus specifically on Share of Voice and its impact on brand perception, especially in the Algerian telecommunications market. This interest was also reinforced by the professional internship carried out at IMMAR Research and Consultancy, which provided a better understanding of the practical importance of media visibility and advertising monitoring.

1.3 Justification of the Choice of the Topic

The choice of this topic is motivated by several factors. At the beginning, this research was inspired by a personal and academic interest in the role of data in marketing, especially in the way brands can evaluate their visibility and performance across communication channels. The initial idea was to focus on social media and to explore a new way of defining and estimating social media Share of Voice. This direction appeared relevant because digital platforms have become central in brand communication, and because social media visibility is increasingly important for understanding how brands compete for consumers' attention.

However, due to the limited time available for the research and the complexity of collecting and analyzing social media data, the study was redirected toward television Share of Voice. This choice made the research more feasible and easier to delimit methodologically, while still remaining highly relevant in the Algerian context. Television continues to be an important mass communication channel, particularly in the telecommunications sector, where operators rely

heavily on advertising visibility to maintain brand presence, reinforce awareness, and influence consumer perception.

The choice of focusing specifically on television Share of Voice can be explained by two main reasons. On the one hand, Share of Voice represents an important media indicator because it reflects the visibility of a brand compared to its competitors. It does not only show whether a brand communicates, but also how present it appears in the advertising environment. On the other hand, concentrating on television allowed the research to be more precise, measurable, and realistic within the available timeframe, by focusing on one clear media channel and one specific brand-perception issue.

Ooredoo Algeria constitutes a relevant case study for this research because it operates in a highly competitive telecommunications market, where communication plays an essential role in differentiation. Studying Ooredoo makes it possible to understand whether television visibility contributes only to brand awareness, or whether it can also influence deeper dimensions such as brand image, perceived quality, and brand preference. This makes the topic useful not only for academic analysis, but also for marketing and media-planning decisions.

This choice was also strengthened by the internship experience at IMMAR Research & Consultancy, which introduced the practical importance of media monitoring, advertising tracking, and data-based marketing decisions. Through this experience, Share of Voice appeared as a strategic indicator that connects media visibility with brand performance. It showed that advertising presence is not only a communication issue, but also a measurable marketing variable that can help brands assess their position in a competitive market.

Finally, the lack of local academic research on the relationship between Share of Voice and consumer-based brand perception represents an opportunity for scientific and practical contribution. Although brand equity and brand perception have been widely studied in international literature, fewer studies focus specifically on media visibility indicators such as Share of Voice in the Algerian telecommunications context. This study therefore represents a first foundation for future research, especially for a next step that could return to the initial idea of studying social media Share of Voice and developing more adapted ways of evaluating brand visibility in digital environments. Thus, the topic combines academic, managerial, and personal

motivations while relying on a concrete and current case: Ooredoo Algeria and the impact of its television visibility on consumer brand perception.

1.4 Research Problem

In a context where the Algerian telecommunications market is highly competitive, advertising visibility plays an important role in the way consumers perceive mobile operators. Since Mobilis, Djezzy, and Ooredoo often offer similar services, television communication becomes a key tool for differentiation and brand positioning.

This research focuses on television Share of Voice as a media indicator that reflects the visibility of Ooredoo compared to its competitors. It seeks to understand whether this visibility influences consumer-based brand perception, particularly through brand awareness, brand image, perceived quality, and brand preference.

The research problem of this dissertation is formulated as follows: To what extent does television media Share of Voice influence consumer-based brand perception of Ooredoo among Algerian consumers?

This main question aims to analyze how Ooredoo's television visibility affects consumers' perception of the brand and whether being more visible on television helps the brand to be remembered, positively evaluated, and preferred.

To better address this problem, the following sub-questions have been formulated:

- SQ1: To what extent does television media Share of Voice influence brand awareness of Ooredoo among Algerian consumers?
- SQ2: How does television media Share of Voice influence the brand image of Ooredoo?
- SQ3: Does television media Share of Voice affect consumers' perceived service quality of Ooredoo?
- SQ4: To what extent does television media Share of Voice influence consumer brand preference for Ooredoo?

1.5 Research Hypothesis

The hypotheses of this study are formulated on the basis of the literature review and the conceptual framework. They aim to verify whether television media Share of Voice influences consumer-based brand perception of Ooredoo among Algerian consumers.

Main hypothesis:

H1: Television media Share of Voice positively and significantly influences consumer-based brand perception of Ooredoo by strengthening brand awareness, brand image, perceived quality, and brand preference.

Sub-hypotheses:

H1a: Television media Share of Voice has a positive and significant effect on brand awareness among Ooredoo consumers.

H1b: Television media Share of Voice has a positive and significant effect on the brand image of Ooredoo.

H1c: Television media Share of Voice has a positive and significant effect on consumers' perceived service quality of Ooredoo.

H1d: Television media Share of Voice has a positive and significant effect on consumer brand preference for Ooredoo.

For statistical testing purposes, the null hypothesis is formulated as follows:

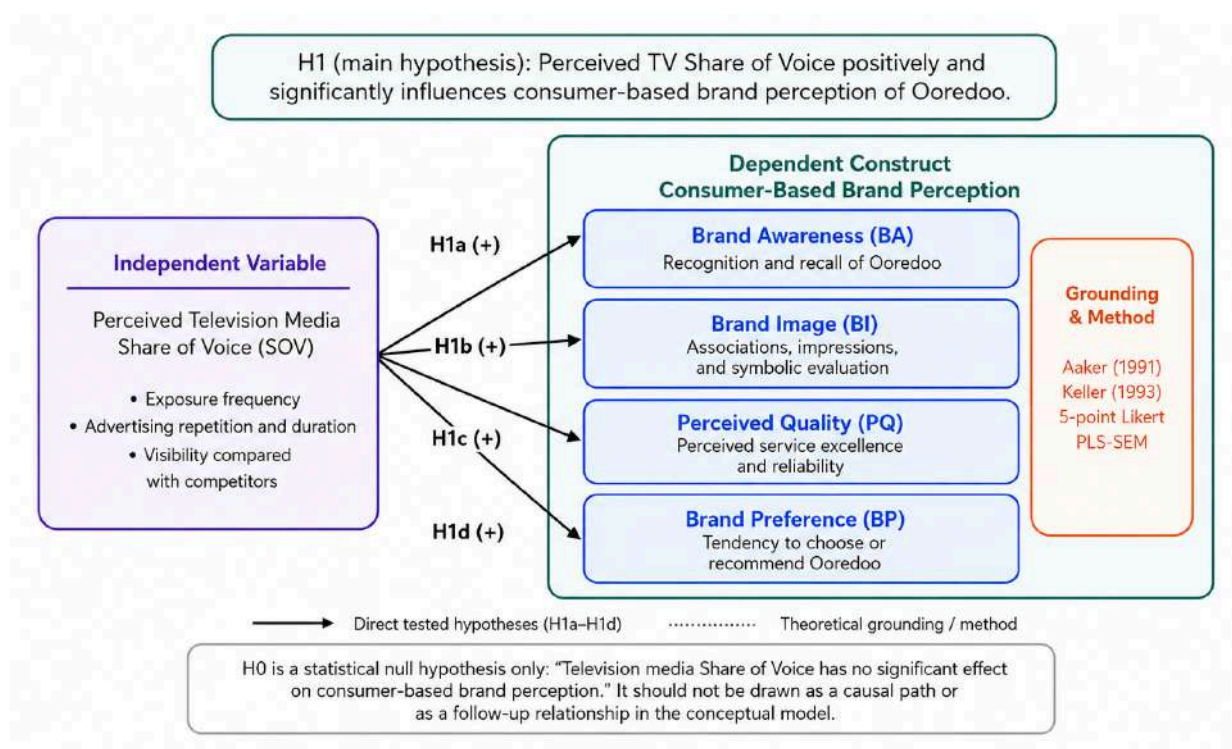
H0: Television media Share of Voice has no significant effect on consumer-based brand perception.

1.6 Conceptual Model of the Research

In order to better visualize the hypothetical relationships between the explanatory variable and the different dimensions of consumer-based brand perception, the following conceptual model illustrates the research model adopted in this study.

It summarizes the main hypothesis and the sub-hypotheses formulated in this research, based on the theoretical framework developed in the first chapter.

Figure 1: Conceptual model of the research



Source: Developed by the author based on the theoretical framework and research hypotheses.

This model is structured around two axes of analysis:

- On the one hand, television media Share of Voice, considered as the independent variable. It refers to the perceived visibility of Ooredoo's television advertising compared with its competitors, through elements such as frequency of exposure, advertising repetition, duration, and television presence.
- On the other hand, consumer-based brand perception, considered as the dependent variable. It is analyzed through four dimensions: brand awareness, brand image, perceived quality, and brand preference.

The construction of this model and the associated hypotheses is based on the contributions of the theoretical framework, particularly:

- The concept of Share of Voice, which explains the relative visibility of a brand within a competitive media environment;

- The consumer-based brand equity approaches of Aaker (1991) and Keller (1993), which highlight the importance of brand awareness, brand image, perceived quality, and preference in consumer brand evaluation;
- Previous works in advertising, media planning, and brand communication, which emphasize the role of repeated media exposure and advertising visibility in shaping consumer perceptions of brands.

1.6.1 Theoretical Justification of the Hypotheses

The hypotheses formulated in this research are grounded in the theoretical and empirical contributions presented in the literature review. The general assumption of the study is that television media Share of Voice, understood as the relative visibility of Ooredoo's television advertising compared with competitors, can influence consumer-based brand perception through repeated exposure, mental availability, brand associations, perceived credibility, and consumer preference.

The main hypothesis, H1, is based on the idea that advertising visibility is not only a media indicator but also a strategic communication variable that can contribute to brand perception. Perry (1998) and Whipple and Walcer (2004) emphasize the relationship between Share of Voice and brand-related outcomes, particularly advertising recall and purchase intention. In the same perspective, Sharp (2010) considers advertising visibility as a factor that supports mental availability and brand growth. Therefore, in a competitive market such as Algerian telecommunications, where operators often offer similar services, television Share of Voice may help Ooredoo strengthen its consumer-based brand perception.

H1a assumes that television media Share of Voice has a positive and significant effect on brand awareness. This hypothesis is supported by Keller's customer-based brand equity framework, in which brand awareness refers to the consumer's ability to recognize and recall a brand. Repeated television exposure increases the probability that consumers remember the brand when thinking about the telecommunications category. Sharp (2010) also highlights the importance of mental availability, while Aitken, Gray, and Lawson (2008) explain that advertising exposure can influence how consumers receive and remember brand messages. Thus, a stronger television presence is expected to improve Ooredoo's brand awareness.

H1b assumes that television media Share of Voice has a positive and significant effect on brand image. According to Keller (1993), brand image is formed through the associations held in consumers' memory. Television advertising contributes to the construction of these associations by repeatedly linking the brand to specific values, symbols, benefits, and emotional meanings. In the Algerian telecommunications context, Rabab'ah, Al-Saidat, and Al-Momani (2020) show that operators such as Ooredoo use persuasive appeals, including celebrity endorsement, emotional appeals, music, social belonging, and national identity, to shape consumers' perception of the brand. Therefore, stronger television visibility may reinforce positive associations and improve Ooredoo's brand image.

H1c assumes that television media Share of Voice has a positive and significant effect on perceived quality. Aaker (1991) considers perceived quality as one of the central dimensions of brand equity, referring to the consumer's subjective evaluation of the superiority or excellence of a brand. In the case of services, and particularly telecommunications, perceived quality may concern network coverage, reliability, service performance, and customer experience. Although perceived quality is partly based on actual service experience, television visibility can also act as a signal of credibility, investment, professionalism, and market strength. Portilla (2015) underlines the importance of television audience exposure for advertisers, while Tabet Aoul (2020) shows that advertising visibility in Algeria can influence consumer reception, although excessive repetition may also generate clutter. Therefore, Ooredoo's television Share of Voice is expected to contribute positively to perceived service quality, provided that visibility remains credible and coherent.

H1d assumes that television media Share of Voice has a positive and significant effect on brand preference. Brand preference reflects the consumer's tendency to choose one brand over competing alternatives. According to Aaker (1991) and Keller (2013), preference is influenced by awareness, image, perceived quality, and the overall strength of brand associations. Repeated exposure to television advertising can increase familiarity with the brand and make it more salient in the consumer's decision process. Aitken, Gray, and Lawson (2008) also emphasize that advertising effectiveness depends on how consumers interpret advertising messages, while Sharp (2010) links visibility and mental availability to brand choice. Consequently, when Ooredoo maintains a visible and consistent television presence, consumers may become more inclined to choose or recommend the brand.

Finally, the null hypothesis H_0 is retained only for statistical testing purposes. It does not represent a theoretical causal relationship in the conceptual model. Its role is to test the absence of a significant effect between television media Share of Voice and consumer-based brand perception. The empirical analysis will therefore determine whether this null assumption should be rejected in favor of the main and sub-hypotheses.

1.7 Methodological Approach

To answer the research problem and test the formulated hypotheses, this study adopts a quantitative methodological approach. This choice is justified by the hypothetico-deductive nature of the research, which is based on a prior theoretical framework allowing the identification and objective evaluation and operationalization of the key variables related to the impact of television media Share of Voice on consumer-based brand perception.

The survey was conducted among a sample of Algerian consumers exposed to television advertising by mobile operators, through a structured online questionnaire. The questionnaire was developed based on recognized concepts and models in the fields of advertising, media planning, and brand equity, particularly the concept of Share of Voice and the consumer-based brand equity approaches of Aaker and Keller.

The data collection instrument was subject to a pre-test in order to ensure the clarity, relevance, and comprehensibility of the questions. This step made it possible to verify whether respondents could easily understand the items and whether the questionnaire was suitable for the research objectives. After this preliminary verification, the final version of the questionnaire was distributed online.

Before analysis, the database was cleaned and prepared. Limited missing answers in the questionnaire file were treated using mean substitution, by replacing each missing value with the mean of the corresponding item/column. This allowed the same cleaned database to be used for the statistical analyses.

Finally, the collected data were analyzed using statistical tools. IBM SPSS Statistics was used to present the descriptive results related to the respondents' profile, television exposure, operator usage, and item-level descriptive statistics. SmartPLS 4 was then used through the Partial Least Squares Structural Equation Modeling approach in order to assess the reliability and validity of

the measurement model, test the structural relationships between the variables, and verify the formulated hypotheses.

1.8 Structure of the Dissertation

This dissertation is structured into several distinct parts. The general introduction presents the context of the study and the reasons that motivated the choice of the topic, by highlighting the importance of television advertising visibility and media Share of Voice in brand communication strategies. It also presents the research problem, the objectives of the study, and the hypotheses formulated. In addition, it introduces the conceptual model on which the research is based, drawing on theoretical contributions related to Share of Voice and consumer-based brand perception. Finally, the introduction provides an overview of the methodological approach adopted and the field of study chosen, namely Ooredoo Algeria in relation to the professional internship context at IMMAR Research & Consultancy.

The first chapter, entitled “Theoretical Framework”, is divided into two main sections. The first section is devoted to the literature review. It is organized around four main axes: the definition, theoretical foundations, and measurement of Share of Voice; the concept of consumer-based brand perception and its link with media visibility; the relationship between Share of Voice and brand perception; and the structure and competitive dynamics of the telecommunications market, with particular attention to Ooredoo Algeria. The second section develops the conceptual framework of the study. It presents the key concepts mobilized in the research, namely Share of Voice, consumer-based brand perception, and television advertising as the medium through which perceived advertising visibility is operationalized.

The second chapter, entitled “Methodological Framework and Organisational Context”, is also structured around two main sections. The first section presents the company and study context. It introduces IMMAR Research & Consultancy as the professional setting of the internship and as a key actor in media research, audience measurement, and advertising monitoring in Algeria. It also presents Ooredoo Algeria as the case study and situates the research within the Algerian telecommunications market. The second section presents the methodological framework of the empirical study. It describes the quantitative approach, the hypothetico-deductive logic, the conceptual model, the construction and pre-test of the questionnaire, the sampling strategy, the

data collection process, the operationalization of variables, and the statistical tools used for analysis.

The third chapter, entitled “Analysis and Discussion of Results”, is devoted to the empirical part of the dissertation and is divided into two main sections. The first section presents and analyzes the results of the study. It includes data screening and the treatment of missing values, the quasi-normality assessment, the descriptive analysis of the respondents’ profile, television exposure, advertising behavior, operator usage, and the descriptive statistics of the study variables using SPSS. It also presents the SmartPLS 4 results, including the evaluation of the measurement model, reliability and validity assessment, the structural model, path coefficients, explanatory power, effect size, and hypothesis testing. The second section discusses the findings in relation to the research problem, the hypotheses, and the theoretical framework. It interprets the impact of television Share of Voice on brand awareness, brand image, perceived quality, and brand preference, while also presenting the managerial implications and the limitations of the study.

Finally, the general conclusion closes the dissertation by summarizing the main findings and answering the research problem. It highlights the theoretical and managerial contributions of the study, recalls its main limitations, and proposes recommendations and future research perspectives, particularly the possibility of extending this work to social media Share of Voice and digital visibility measurement.

CHAPTER I: THEORETICAL FRAMEWORK

Section 1: Literature Review

In a context where television remains a central mass medium in Algeria, and where competition among telecom operators (Mobilis, Djezzy, Ooredoo) increasingly depends on media visibility and brand perception, it becomes essential to understand how Share of Voice on television influences consumer-based brand perception. This literature review aims to present the theoretical foundations and previous research related to our research problem.

It is organized around four main axes: first, the definition, theoretical foundations, and measurement of Share of Voice; second, the conceptualization and dimensions of consumer-based brand perception and its link with media visibility; third, the analysis of the link between Share of Voice and brand perception; and fourth, an examination of the telecommunications market, including its structure, competitive dynamics, and the specific case of Ooredoo.

1.1 Share of Voice

Share of Voice is one of the most fundamental concepts in marketing communications. It refers to the relative advertising presence of a brand within its competitive category, serving both as a measure of media investment and as a strategic indicator of competitive positioning. Understanding its theoretical foundations, estimation methods, and strategic implications is essential for this study, as it constitutes the independent variable whose impact on brand perception we seek to evaluate (Sharp, 2010; Whipple & Walcer, 2004).

In contemporary marketing practice, Share of Voice refers to a brand's media spending expressed as a percentage of all media expenditures in the category, in that market, on that channel, and at that particular point in time (Nielsen, 2025). As highlighted by these industry standards, unlike outcome-based metrics, it does not evaluate the impact of a campaign but rather whether the campaign has the means to be competitive in the first place. This distinction is important: this metric functions as a resource indicator, not a performance indicator; it tells marketers whether their investment is sufficient to compete before assessing whether it is effective.

1.1.1 Theoretical Foundations, Measurement, and Quantitative Relationships of Share of Voice

Perry (1998, p. 206) provides clear definitions of these concepts: “In advertising, ‘Share of Voice’ refers to the intensity of advertising for a particular brand compared with all other brands of a given product. ‘Share of market’ refers to the percent of people who choose to buy a brand as a fraction of those who choose all brands.” The same author emphasizes that “the greater the Share of Voice, the greater the share of market”.

Whipple and Walcer (2004, p. 47) further specify that Share of Voice is 'the total percentage that a brand possesses of a particular audience that is being targeted by that brand' and that, for practical measurement purposes, it represents 'a measure of the relative share of the advertising dollars spent to reach specific audiences targeted by a brand'.

Traditionally, Share of Voice was measured solely in terms of advertising expenditure or share of airtime (such as Gross Rating Points (GRP) and Target Audience Rating Points (TARP) in television). However, media fragmentation has broadened this definition. In digital environments, this metric can also be measured through social media mentions, search engine visibility, or online media coverage. This evolution makes the concept more relevant for advertisers seeking to evaluate their overall visibility, but it also complicates standardized measurement across different channels.

In the television context, however, SOV measurement is inseparable from media monitoring and audience measurement. Media monitoring identifies the factual presence of commercials by recording variables such as advertiser, brand, channel, date, time slot, duration, and number of insertions. Audience measurement then estimates the size and composition of the public exposed to those insertions. This is why television SOV is often interpreted through audience-weighted indicators such as reach, frequency, GRP, TARP, and audience rating (taux d'audience), rather than through spot counts alone.

Portilla (2015) emphasizes that television audience data is used by both broadcasters and advertisers: broadcasters need it to schedule content and reach valuable audiences, while advertisers need it to communicate with actual and potential consumers. In commercial television markets, audience data also operates as a currency for buying and selling advertising space. Therefore, two brands may air a similar number of commercials, but the brand present in higher-rated programs or time slots obtains stronger effective visibility. This distinction is central to the present study because television SOV should be understood not only as advertising volume, but also as exposure potential within the audience market.

This fundamental theorem has been validated across diverse contexts. While originally applied beyond commercial advertising, notably to public health, where Perry (1998) demonstrated that the intensity of tobacco marketing predicts youth smoking behavior, the Share of Voice to Share of Market relationship has since been confirmed across consumer goods categories and competitive markets.

The concept of Excess Share of Voice, developed by Binet and Field (2013), extends the basic theoretical relationship by introducing a dynamic growth dimension. Rather than simply estimating current advertising weight, Excess Share of Voice quantifies the gap between a brand's media investment and its commercial weight, and uses this gap to predict future market share evolution.

Byron Sharp (2010), director of the Ehrenberg-Bass Institute for Marketing Science, establishes in his seminal work "How Brands Grow" that Share of Voice is a leading indicator of brand growth. When a brand's advertising share exceeds its market share, the resulting surplus acts as an advance indicator of future market share gains, because increased visibility generates higher awareness and consideration among consumers. Conversely, a brand whose advertising volume falls below its market share risks losing ground to more visible competitors.

Sharp (2010) also illustrates the double jeopardy law: smaller brands suffer from both lower penetration and lower loyalty than their larger competitors simultaneously. Hansen and Christensen (2005) examined the relationship between advertising and market share within the framework of the Advertising Intensiveness Curve developed by John Philip Jones (1990). Their regression analysis confirms that smaller brands must "overspend" in communication relative to their size to establish themselves, while larger brands can "underspend" while maintaining their position. This equilibrium point varies according to market structure: in oligopolistic markets, it is significantly higher than in more competitive ones, meaning that concentrated markets require proportionally greater communication investment.

To measure the effectiveness of brand-building efforts, marketers rely on a range of quantitative and qualitative indicators. Traditional Share of Voice measures focus on advertising expenditure or media presence volume. In television advertising, traditional metrics include reach, frequency, and media share calculated based on advertising expenditure or airtime relative to competitors. Ahmed et al. (2015) identify several key metrics for assessing digital media performance,

including potential reach, mentions per time period, inbound links, Share of Voice, and share of conversation. The measurability of digital media is identified by these researchers as a core benefit, noting that creating awareness via social media allows for precise quantification. Furthermore, they provide a useful comparison of traditional and digital media approaches to measurement, highlighting that traditional media is characterized by mass marketing and one-way communication, whereas digital media enables personalized dialogue and real-time evaluation.

1.1.2 Strategic Role and Limitations of Share of Voice

Beyond its predictive function, media share serves several strategic purposes for advertisers. It enables competitive benchmarking: by comparing their relative visibility to that of their rivals, brands can evaluate their positioning and identify growth opportunities. It also guides budget allocation: brands may decide to increase investments in channels where their market presence is weak compared to competitors. Finally, in mature markets, media share serves as a defensive indicator: maintaining a stable advertising footprint can be as important as increasing it, because a decline in visibility quickly translates into market share losses.

Hansen and Christensen (2005) identify two key factors that influence this relationship. First, the advertising level in the product category: in categories with low advertising intensity, smaller brands must invest much more heavily to establish themselves. Second, market competitive structure: in oligopolistic markets, the equilibrium point between advertising weight and market share is considerably higher than in more fragmented competitive markets. This means that in concentrated markets like the telecommunications sector, even brands with substantial market share must maintain relatively high communication investment.

Eagle et al. (2005) provide a complementary perspective by examining advertising's role in mature markets. Using the New Zealand fast food sector as a case study, they argue that advertising in mature markets is primarily defensive, aimed at protecting existing market shares rather than expanding overall market size. They introduce the concept of advertising as a "zero-sum game" in mature markets: gains for one brand come at competitors' expense. This concept has been further echoed in more recent literature: Gumede (2019) demonstrates that the zero-sum dynamic extends to digital advertising contexts, where competition for consumer attention makes every gain in Share of Voice by one brand a direct loss for its competitors. Their

analysis reveals that apparent increases in advertising spending often mask the struggle to maintain visibility. This finding is particularly relevant for mature markets like the telecom sector, where apparent increases in communication spending may reflect rising media costs rather than strategic aggressiveness.

Research by Whipple and Walcer (2004, p. 47) provides additional evidence of the strategic importance of advertising media weight beyond expenditure metrics. Their study demonstrates that Share of Voice explains advertising recall and purchase intent better than the effective frequency concept, and is more influential than Gross Rating Points (GRP) weight in determining brand recall for low-involvement decisions. Building upon this ratio of advertising weight to market weight, the authors identify two distinct types of advertisers: "profit takers", who spend below their market weight and extract short-term value from accumulated brand equity without reinvesting in visibility; and "investors", who overspend relative to their market share in order to build future growth (Whipple & Walcer, 2004, p. 48). This distinction is directly applicable to the Algerian telecommunications market: with a market share of approximately 26% (Benatia & Abid, 2025), Ooredoo's television advertising positioning, whether as a profit taker or an investor, has direct implications for its long-term brand perception and competitive standing.

Despite its usefulness, Share of Voice has several limitations. First, it measures the quantity of visibility but not its quality: a brand with a dominant media presence can still be associated with negative coverage or unfavorable consumer sentiment. Second, advertising expenditure-based measurement does not capture the value of earned media (public relations, word-of-mouth, organic mentions). Third, media fragmentation makes it difficult to compare a brand's relative presence across different channels (television, print, social media, Search Engine Optimization) because estimation methods vary considerably. These limitations justify the use of complementary measures such as sentiment analysis or brand awareness surveys.

A further limitation concerns the possibility of advertising clutter. A high Share of Voice can increase mental availability, but excessive repetition may also produce irritation, avoidance, or resistance. Tabet Aoul and Benhabib (2018) explain that advertising clutter can trigger consumer resistance when the number of advertisements or repeated exposure to the same message exceeds the consumer's threshold of acceptance. In this sense, SOV must be interpreted as a

strategic visibility indicator whose effect depends on both exposure intensity and audience receptivity.

This point is particularly relevant in Algeria. Tabet Aoul (2020), in a study of Algerian television advertising clutter, found that clutter is mainly associated with excessiveness, repetition, and the length of commercials. The study also highlights that Ramadan is perceived as a period of particularly high advertising pressure. For a telecommunications brand such as Ooredoo, this means that visibility during high-audience periods may support awareness and image, but the same visibility can lose effectiveness if consumers perceive it as intrusive or repetitive.

In the specific context of television advertising, Rabab'ah et al. (2020, p. 311) developed a comprehensive taxonomy for analyzing persuasive appeals in television commercials, identifying 14 distinct types of appeals: music, celebrity endorsement, social, emotional, rational, brand, play on words, humour, appeal for price, adventure, youth and modernity, snob, statistics, and personal appeals. Their analysis of Algerian telecommunication television commercials revealed that play on words, brand, and music were the most frequently used appeals, followed by social, celebrity endorsement, emotional, and rational appeals. This taxonomy provides a methodological foundation for evaluating how television visibility translates into consumer perceptions.

1.2 Consumer-Based Brand Perception, Dimensions and Link with Media Visibility

Consumer-based brand perception refers to the mental representation and evaluation of a brand formed in the mind of the consumer based on prior experiences, knowledge, and exposure to brand communications. It is a multidimensional construct grounded in the theoretical frameworks of Keller (1993), Aaker (1991), and further elaborated by Keller (2013) in *Strategic Brand Management*. The construct is operationalized in this study through four dimensions: brand awareness, brand image, perceived quality, and brand preference.

Brand awareness reflects the consumer's ability to recognize and recall a brand in relevant buying situations. It is a key prerequisite for building strong brand equity, as a brand cannot influence perceptions or preferences if it is not mentally accessible (Keller, 2013, pp. 68–70). Awareness can be spontaneous (unaided) or assisted (aided), and both forms contribute to a consumer's overall familiarity with the brand. Television advertising, through repeated exposure

and strategic frequency, is particularly effective in enhancing brand awareness because it increases the likelihood that the brand comes to mind during a purchasing decision (Sharp, 2010; Aitken, Gray, & Lawson, 2008). In the context of the Algerian telecommunications market, where consumers are exposed to multiple operators offering similar services, heightened brand awareness through media visibility can become a critical differentiating factor.

Brand image encompasses the set of associations that consumers hold about a brand in their memory, including perceived personality traits, values, and emotional benefits (Keller, 2013, pp. 71–73). A positive brand image contributes to stronger brand equity by shaping consumer attitudes and expectations. Advertising and media presence reinforce these associations by providing repeated cues that link the brand to specific attributes or experiences. For instance, an operator emphasizing reliability, network coverage, and customer service in its television advertising can strengthen the corresponding brand image dimensions in consumer's minds (Rabab'ah, Al-Saidat, & Al-Momani, 2020). Moreover, media visibility serves as a signal of credibility and quality, which influences not only perceptions but also the trust consumers place in the brand.

Perceived quality is the consumer's subjective evaluation of the overall excellence or superiority of a brand relative to alternatives (Keller, 2013, pp. 73–76). It extends beyond technical specifications to include service consistency, reliability, and customer experience. Higher media exposure can indirectly enhance perceived quality by repeatedly associating the brand with positive messages and demonstrating its prominence in the marketplace (Portilla, 2015; Tabet Aoul, 2020). In a competitive market like Algerian telecommunications, perceived quality often influences switching behavior and loyalty, as consumers rely on heuristics such as visibility and reputation when direct experience is limited.

Brand preference indicates the extent to which consumers favor one brand over competing alternatives and are more likely to choose it in a purchase situation (Aaker, 1991; Keller, 2013). Preference is shaped by the combined effect of awareness, image, and perceived quality. Media visibility, measured as Share of Voice, contributes to preference by ensuring the brand is salient, credible, and associated with desired attributes. The more consistently a brand appears in high-visibility channels like television, the more likely consumers are to develop a positive attitude toward it, resulting in increased preference (Aitken, Gray, & Lawson, 2008; Sharp, 2010).

The relationship between television Share of Voice and consumer-based brand perception has been extensively documented in marketing literature. A strong media presence increases mental availability, reinforces brand associations, and can serve as a signal of quality and credibility (Keller, 2013, pp. 79–85). Moreover, high advertising intensity can influence each of the four dimensions by ensuring repeated exposure, which consolidates awareness, strengthens associations, and enhances perceived quality and preference (Lavidge & Steiner, 1961; Aitken et al., 2008). Empirical studies in similar contexts have shown that television advertising contributes to brand equity by reinforcing these dimensions, particularly in competitive and saturated markets like Algerian telecommunications (Tabet Aoul & Benhabib, 2018; Rabab'ah et al., 2020).

In addition to these theoretical foundations, the Algerian context adds unique considerations. Consumers are exposed to multiple operators with comparable service offerings (Mobilis, Djezzy, and Ooredoo), making media visibility a critical determinant of differentiation. Television remains a key channel for reaching a broad audience, particularly for campaigns that combine frequency, duration, and coverage strategically. Although digital channels are growing, television Share of Voice continues to provide a benchmark for visibility and relative prominence in the market (Benrabah, 2024; Portilla, 2015).

In conclusion, television advertising visibility, operationalized as Share of Voice, is hypothesized to influence consumer-based brand perception by enhancing brand awareness, shaping brand image, improving perceived quality, and increasing brand preference. This linkage forms the foundation for the study's hypotheses and is explored both theoretically and empirically in the following chapters.

1.3 Link between Share of Voice and Brand Perception

The relationship between media share and brand perception has been examined in various media contexts, with television remaining one of the most influential channels for brand communication. Rabab'ah et al. (2020) provide empirical evidence from the Algerian telecommunications market, demonstrating how telecommunication companies use television advertising to shape consumer perceptions. Their analysis of Ooredoo and Djezzy television commercials reveals that advertisers strategically employ multiple persuasive appeals –

including brand emphasis, emotional engagement, celebrity endorsement, and social belonging – to influence how consumers perceive their brand.

Nevertheless, the relationship between television SOV and brand perception should not be understood as purely mechanical. Aitken, Gray, and Lawson (2008) argue that advertising effectiveness research has shifted from a narrow focus on message form and execution toward the process of reception and the social and cultural roles that advertising plays in consumers' lives. From this consumer-centered perspective, viewers are not passive receivers of advertising exposure; they actively interpret, negotiate, and sometimes resist advertising meanings. Consequently, television SOV creates an opportunity for exposure, but its influence on awareness, image, perceived quality, and preference depends on how consumers interpret the advertising messages they encounter.

1.3.1 Empirical Evidence from Ooredoo's Television Commercials

The study by Rabab'ah et al. (2020, p. 312) shows that Ooredoo's television commercials leverage football and national pride through the association with Zinedine Zidane and Algerian football legends, creating both emotional and social appeals that strengthen brand image. Similarly, their analysis of the "Sahla Box" campaign highlights the use of rational appeals alongside personal and social elements that position the brand as meeting family needs. Furthermore, the researchers note that the "Haya! Music" campaign combines music, celebrity endorsement (Moh Paco), and adventure appeals to actively position Ooredoo as innovative and youthful.

1.3.2 How Share of Voice Influences Each Dimension of Brand Perception

Brand awareness is enhanced through repeated television exposure: a strong media presence during prime-time hours increases the frequency with which consumers encounter the brand, thereby strengthening both recognition and recall. Algerian telecommunication companies broadcast their commercials on main national channels, ensuring wide reach (Rabab'ah et al., 2020). Brand image is built through the strategic use of persuasive appeals, with Ooredoo deploying celebrity endorsement and emotional messaging to construct associations with success, national identity, and innovation. Moreover, perceived quality is influenced by advertising signals of credibility and investment: professional production, high-profile

endorsements, and consistent presence are interpreted by consumers as quality cues, with rational appeals directly communicating service attributes. Finally, brand preference is shaped by the mere-exposure effect (Zajonc, 1968): repeated familiarity with a brand generates positive attitudes, while emotional and social appeals build lasting associations that translate into preference.

The literature therefore suggests a balanced interpretation of SOV. On the one hand, higher television visibility can strengthen brand awareness, reinforce associations, signal quality, and support preference. On the other hand, consumer reception, advertising clutter, and avoidance behaviors may moderate this effect. This is why the present study focuses on consumer-based brand perception: it examines whether Ooredoo's perceived television visibility is actually reflected in consumers' awareness, image, perceived quality, and preference, rather than assuming that media pressure automatically produces positive brand outcomes.

1.4 The Telecommunications Market: Structure, Dynamics, and Media Visibility

The telecommunications sector represents one of the most dynamic and competitive markets globally, characterized by rapid technological evolution, high penetration rates, and intense oligopolistic competition. In Algeria specifically, this market has undergone significant transformation over the past decade, creating a context in which media visibility and brand communication have become central levers of competitive differentiation. This section examines the structure and competitive dynamics of the telecommunications market, the determinants of customer behavior, and the strategic role of Share of Voice and media visibility within it.

1.4.1 Market Structure, Competitive Dynamics, and Customer Behavior

The telecommunications market in Algeria represents one of the most dynamic and successful economic sectors, characterized by rapid development and significant growth. According to data from the Postal and Electronic Communications Regulatory Authority (ARPCE), Algeria counted 45.55 million mobile subscribers with a penetration rate of 103% in the fourth quarter of 2020, rising to 51.97 million by the first quarter of 2024 (Boudiaf et al., 2022; Benatia & Abid, 2025). A notable trend is the rapid adoption of high-speed technologies: Third Generation (3G) and Fourth Generation (4G) subscribers represented 85.11% of total subscriptions by end of 2020, compared to only 14.89% for Global System for Mobile Communications (GSM)-only subscribers (Boudiaf et al., 2022, p. 231). This shift demonstrates the growing demand for data

services and ongoing investments in network modernization, with market shares following a stable hierarchy led by Mobilis, followed by Djezzy and Ooredoo.

Boudiaf et al. (2022) conducted a comparative study examining competitive advantage indicators among the three operators, based on a sample of 153 employees. They analyzed five key dimensions: creativity and innovation, cost, speed, quality and performance, and flexibility. Using one-way Analysis of Variance (ANOVA) tests, the study found no statistically significant differences across most dimensions, concluding that “there are no significant differences between telecom operators about competitive advantage indicators” (Boudiaf et al., 2022, p. 225). This suggests that from an internal perspective, the three operators are perceived as relatively homogeneous.

Complementing these findings, Benatia and Abid (2025) conducted a quantitative study on 420 mobile subscribers to identify determinants of customer satisfaction and loyalty. Using structural equation modelling, they found that customer experience has the strongest impact on both satisfaction and loyalty, followed by service quality. Competitive service pricing affects satisfaction but not loyalty, and service innovation showed no significant impact on either dimension. Since the authors observed that “the pricing strategies adopted by the three mobile operators in Algeria are hardly distinguishable” (Benatia & Abid, 2025, p. 281), brand perception and media visibility emerge as key differentiating factors in this homogeneous market.

1.4.2 Media Visibility, Share of Voice, and Competitive Positioning

The relationship between media visibility and brand positioning is well established in marketing literature. Brand positioning refers to creating a “divergent/positive/motivational image in the mind of people for our product” (Ahmed et al., 2015, p. 10). Media visibility, whether through traditional or digital channels, plays a crucial role in shaping this image. The same researchers conducted an exploratory qualitative study revealing that media platforms enable companies to target specific consumer segments precisely, enhancing the effectiveness of positioning strategies and building brand associations that shape consumer perceptions.

Eagle et al. (2005) demonstrate that in mature markets, Share of Voice functions primarily as a defensive tool. The “zero-sum game” nature of advertising in mature markets, further confirmed by Gumede (2019) in the context of digital advertising, means that a brand’s Share of Voice

reflects its ability to resist competitive pressures and maintain its perceived position in the minds of consumers.

Television remains a central medium for telecommunication advertising in Algeria. Rabab'ah et al. (2020) provide the most comprehensive analysis of Algerian telecommunication television commercials, examining six advertisements from Ooredoo and Djezzy. Their findings reveal that both operators employ a diverse range of persuasive appeals to reach their target audiences. For Ooredoo specifically, the first analyzed commercial features Zinedine Zidane as brand ambassador alongside Algerian football legends, using social and emotional appeals to invite viewers to affiliate with the brand. Additionally, their analysis of the "Sahla Box" family offer reveals a combination of personal, social, and rational appeals highlighting product features, alongside play on words, humour, and snob appeal. The study also notes that the launch of "Haya! Music" deploys music, celebrity endorsement, and emotional appeals to position Ooredoo as innovative and youthful. Finally, the comparison shows that while both operators use similar appeal types, their emphasis differs: Ooredoo focuses more on celebrity endorsement and emotional appeals, while Djezzy emphasizes humour and social belonging.

These findings have direct implications for analyzing competitive positioning in the Algerian telecommunications market. With mobile penetration exceeding 100 percent, Algeria exhibits the characteristics of a mature market where media share functions primarily as a defensive indicator (Eagle et al., 2005). The relative homogeneity in perceived competitive advantage across operators (Boudiaf et al., 2022) underscores the importance of examining external indicators of differentiation. When internal capabilities are perceived as similar, competitive positioning is increasingly shaped by communication strategies and brand perception. For Ooredoo, this implies that not just the quantity but the quality of television visibility – the specific persuasive appeals employed – matters for brand perception.

1.4.3 Synthesis and Research Gap

The existing literature, particularly the empirical analysis of Algerian telecommunication television commercials by Rabab'ah et al. (2020) provides a solid foundation for analysing how television advertising weight affects consumer-based brand perception. This study extends previous research by quantitatively evaluating the relationship between television Share of Voice and brand perception for Ooredoo in Algeria.

While previous studies have examined the content and persuasive appeals of these campaigns, the actual impact of advertising volume remains largely unexplored. Because the Algerian telecom market is highly saturated and consumers perceive the operator's services and pricing as almost identical, visibility itself becomes a primary differentiator. Yet, no research has systematically measured how variations in Share of Voice on television translate into variations in brand awareness, brand image, perceived quality, and brand preference. This study aims to fill this gap.

Section 2: Conceptual Framework

To better understand the mechanisms underlying the impact of television advertising on consumer-based brand perception, this section presents the key concepts mobilized in the research and the theoretical links between them. It is organized around three axes: first, the definition and measurement of Share of Voice (SOV); second, consumer-based brand perception and customer value creation; and third, television advertising as the medium through which perceived advertising visibility is operationalized in this study. The objective is to build a coherent theoretical foundation for the empirical analysis developed in the following chapter.

2.1 Share of Voice (SOV): Definition, Measurement, and Theoretical Foundations

This subsection examines the independent variable of the study. It first defines the indicator in the television advertising context, then presents the theoretical frameworks that connect relative media presence with brand performance: the Double Jeopardy Law, Excess Share of Voice, the 60/40 Rule, and strategic budgeting models based on the relationship between advertising weight and market share.

2.1.1 Definition and Measurement of share of Voice (SOV)

In marketing communications, Share of Voice refers to a brand's advertising intensity relative to its competitors. Sharp (2010) approaches it as the brand's share of total advertising expenditure or advertising exposure within a given category and media channel. In its expenditure-based form, the indicator can be calculated as follows:

$$\text{SOV} = (\text{Brand's advertising expenditure} / \text{Total category advertising expenditure}) \times 100$$

This definition is particularly relevant in television. Napoli (2003) explains that television broadcasters sell audience attention to advertisers: programs attract viewers, and this attention is

then packaged and sold as advertising space. When a brand purchases airtime, it is therefore buying access to viewers' attention.

From a professional media-planning perspective, television Share of Voice (SOV) is usually constructed by combining media monitoring data with audience measurement data. Monitoring provides the observable advertising presence of each brand, while audience measurement provides the weight of each insertion according to the number and profile of viewers reached. Portilla (2015) notes that traditional television audience measurement has often relied on people meters, which record who is watching and what they are watching, while the digital era has increased the need for more complex and auditable measurement systems. Benrabah (2024) similarly underlines that the quantitative concept of audience is closely linked to exposure and has become central for media professionals and advertisers.

In the empirical part of this dissertation, Share of Voice (SOV) is measured through consumers' perceived television visibility of Ooredoo rather than through a proprietary database of monitored spots, Gross Rating Points (GRP), Target Audience Rating Points (TARP), or official audience ratings. This choice is consistent with the consumer-based orientation of the research, since the objective is to test how perceived visibility is associated with brand awareness, brand image, perceived quality, and brand preference. However, it also means that perceived SOV should be distinguished from objectively audited media weight, which could be integrated in future research.

2.1.2 Theoretical Foundations Related to Advertising Visibility

Four theoretical perspectives support the strategic role of advertising visibility in this research. Sharp's Double Jeopardy Law explains the structural disadvantage of smaller brands. Binet and Field's concept of Excess Share of Voice links advertising surplus to future growth. Their 60/40 Rule clarifies the balance between long-term brand building and short-term activation. Finally, Whipple and Walcer's strategic budgeting model translates relative media weight into competitive action.

A- The Double Jeopardy Law. Sharp (2010) establishes a systematic relationship between brand size, market penetration, and customer loyalty. Smaller brands are disadvantaged on both dimensions at the same time: they have fewer buyers and, on average, weaker loyalty than larger

brands. This creates a cumulative competitive disadvantage that communication strategies must take into account.

Table 1: The Double Jeopardy Law

Brand Size	Market Penetration	Customer Loyalty
Large brands	High	High
Small brands	Low	Low

Source: Adapted from Sharp (2010).

Table 1 illustrates this dual effect. Brands with lower penetration also tend to experience lower customer retention, which reinforces their competitive weakness. In the Algerian telecommunications market, this logic is relevant because Ooredoo's lower market share, estimated at approximately 26%, implies reduced consumer reach compared with the market leader, Mobilis (Benatia & Abid, 2025).

B- Excess Share of Voice. Binet and Field (2013) extend the advertising-market share relationship by introducing a dynamic growth dimension. Instead of looking only at current media weight, the concept compares a brand's advertising share with its commercial weight. When advertising investment exceeds market share over time, the resulting surplus tends to support future growth by increasing awareness and consideration. Conversely, a brand whose media presence remains below its market share risks losing ground to more visible competitors.

This growth-oriented perspective is complemented by another contribution from the same authors: the 60/40 Rule. While Excess Share of Voice focuses on competitive weight, the 60/40 framework concerns the internal allocation of communication budgets between long-term and short-term objectives.

C- The 60/40 Rule. Binet and Field (2013) argue that effective communication generally requires a balance between long-term brand building and short-term sales activation. Their work suggests that approximately 60% of the communications budget should support brand building - activities that strengthen awareness, image, and emotional associations - while 40% should be dedicated to activation. In this logic, sufficient media visibility is a prerequisite for both objectives.

Table 2: Key Principles of Binet and Field's Advertising Effectiveness Research

Principle	Description
60/40 Rule	60% long-term brand building, 40% short-term sales activation
Emotional over rational	Emotional campaigns generate larger and more durable effects than rational campaigns
Advertising share drives growth	Brands that maintain advertising weight above their market share tend to grow.

Source: Adapted from Binet and Field (2013).

Table 2 summarizes the main principles associated with this research stream. The key idea is that media weight is not only a tactical buying metric; it is also a strategic lever for brand growth. Without sufficient reach and continuity, neither long-term brand building nor short-term activation can be fully effective.

As discussed in the literature review, advertising in mature markets often functions as a “zero-sum game”: gains in visibility for one brand come at the expense of competitors (Eagle et al., 2005; Gumede, 2019). This is especially relevant in Algerian telecommunications, where mobile penetration exceeds 100% and operators offer services that consumers may perceive as relatively similar.

Building on these principles, Whipple and Walcer (2004), drawing on Rossiter and Percy (1997), propose a strategic advertising budgeting model that is directly applicable to competitive contexts such as telecommunications. The model recommends different strategies depending on the brand's position and the competitor's advertising behavior: niche defense when the leader outspends its market weight, aggressive attack when a rival under-spends, maintenance when equilibrium is stable, and defensive increase when a rival becomes aggressive. Applied to Algeria, this positions Ooredoo as a follower whose television strategy depends on the communication posture of Mobilis and Djezzy.

2.2 Consumer-Based Brand Perception

Consumer-based brand perception is a central concept in this study, as it represents the dependent variable. This section defines the concept of brand perception, presents its theoretical foundations, describes its four core dimensions, their determinants, and their link with consumer behavior and customer value creation.

2.2.1 Concept, Definition, and Dimensions of Brand Perception

Kotler et al. (2021) describe a brand as a promise made to consumers, helping to set expectations and reduce perceived risk.

According to Chernev (2023), a brand is defined as “a marketing tool used to identify an offering, differentiate it from similar market offerings, and create distinct market value above and beyond that created by the other attributes of the offering.” He distinguishes the brand itself - its name, logo, motto, and other identifying attributes - from brand image, which he describes as “the network of brand-specific associations that exists in people’s minds.”

Roesse (2023) complements this perspective by emphasizing the mental nature of brand image, viewing it as something that lives inside the mind of the target customer and reflects the beliefs, assumptions, experiences, and expectations associated with a brand. This idea is consistent with Walter Landor’s widely cited observation that products are made in factories, whereas brands are created in the mind (as cited in Chernev, 2023, p. 172).

The following figure illustrates how brand image functions as a network of associations in the consumer’s mind. Each node in the network represents a concept associated with the brand, and the proximity of each node to the brand name reflects the strength and directness of that association.

Figure 2: Brand association map



Source: Adapted from Chernev (2023, p. 173).

As illustrated in Figure 2, brand image can be represented as a network of associations in consumers' minds. Each node corresponds to a concept linked to the brand, and proximity to the brand name reflects the strength and directness of the association.

Consumer-based brand perception refers to how consumers mentally represent and evaluate a brand. The concept is grounded in Keller's customer-based brand equity framework, where brand knowledge is composed of brand awareness and brand image (Keller, 1993). Awareness reflects the consumer's ability to recognize or recall the brand, while image refers to the associations, beliefs, and attitudes stored in memory. These two dimensions form the basis of brand perception and continue to structure more recent brand equity research (Keller & Swaminathan, 2020).

Aaker (1991, 1996) offers a complementary multidimensional view of brand equity, including brand awareness, perceived quality, brand associations, and brand loyalty. Perceived quality corresponds to the consumer's subjective judgment of a brand's overall excellence or superiority, while loyalty reflects attachment and the intention to repurchase or recommend the brand.

For the purpose of this study, consumer-based brand perception is examined through four dimensions: brand awareness, brand image, perceived quality, and brand preference. Each dimension is defined and operationalized as follows:

A. Brand Awareness: Brand awareness refers to the consumer's ability to recognize and recall a brand in different situations (Keller, 1993). It includes recognition, which confirms prior exposure, and recall, which requires retrieving the brand from memory when thinking about a product category. In telecommunications, this dimension is particularly important because consumers often choose among a limited set of operators: Mobilis, Djezzy, and Ooredoo. When offers appear similar, the brand that comes to mind first can obtain a competitive advantage. In the Algerian context, Saoudi et al. (2021) show that digital reputation contributes to brand recognition among young consumers, reinforcing the link between media visibility and awareness.

Brand Image: Brand image is defined as "perceptions about a brand as reflected by the brand associations held in consumer memory" (Keller, 1993, p. 3). These associations may be functional, symbolic, or experiential. A favorable image is built when associations are strong, positive, and distinctive. In Algeria, Redjem and Telilani (2025) show that user experience

contributes to brand image in mobile application marketing. Television also plays a role: Ooredoo's campaigns analyzed by Rabab'ah et al. (2020) use celebrity endorsement, emotional appeals, and national pride to associate the brand with success, innovation, and Algerian identity.

C. Perceived Quality: Perceived quality is the consumer's subjective judgment of a product's or service's overall excellence (Aaker, 1991). In telecommunications, it may include network coverage, call clarity, internet speed, customer service responsiveness, and reliability. Benatia and Abid (2025) demonstrate that service quality significantly influences customer satisfaction and loyalty in the Algerian mobile market, despite persistent infrastructure challenges in rural and isolated areas. This means that perceived quality is not shaped by advertising alone; it also depends on actual service performance. Nevertheless, television advertising can signal credibility and investment, particularly through rational appeals that communicate product features and service benefits.

D. Brand Preference: Brand preference refers to the degree to which consumers favor one brand over competing alternatives (Keller & Swaminathan, 2020). It is a behavioral intention that precedes actual choice and is shaped by previous experience, associations, perceived quality, and advertising exposure. In Algeria, Benachenhrou (2024) finds that perceived quality, value, satisfaction, trust, commitment, and brand attachment positively influence brand loyalty. This supports the idea that preference is a more demanding dimension than awareness because it depends on both communication and lived experience.

These four dimensions are theoretically distinct but empirically connected. Keller (1993) emphasizes awareness and image as components of brand knowledge, while Aaker (1991) adds perceived quality and loyalty-related outcomes. In the present study, brand preference is used as a behavioral intention close to loyalty. The Algerian telecommunications context makes this multidimensional approach particularly relevant because television commercials may simultaneously increase recognition, strengthen associations, signal quality, and support preference through repeated exposure and emotional familiarity.

Table 3: Dimensions of Brand Perception (Aaker, 1991)

Dimension	Definition
Brand loyalty	The attachment that a customer has to a brand, reflecting how likely a customer will switch to another brand
Brand awareness	The ability of a potential buyer to recognize or recall that a brand is a member of a certain product category
Perceived quality	The customer's perception of the overall quality or superiority of a product or service relative to alternatives
Brand associations	Anything linked in memory to a brand (including brand image, perceived value, brand personality, and organizational associations)

Source: Adapted from Aaker (1991).

Table 3 summarizes the main dimensions of brand equity as conceptualized by Aaker (1991). Each dimension captures a distinct facet of how consumers mentally represent and evaluate a brand. In this research, brand loyalty is operationalized as brand preference, reflecting the consumer's inclination to choose Ooredoo over competing operators.

Keller (1998) further distinguishes two levels of awareness: recognition, which relies on passive memory, and recall, which requires active retrieval when the product category is mentioned. Both levels can be influenced by the frequency and quality of advertising exposure, making television visibility particularly relevant to the first stage of brand perception.

The same author also defines brand image through the associations held in consumer memory. These associations can be functional, symbolic, or experiential, and become favorable when they are strong, positive, and unique. Repeated television messages help construct and reinforce such associations over time.

Roesse (2023) identifies three psychological indicators of brand health: awareness, image, and attitude. Awareness answers whether the brand is known, image answers which associations come to mind, and attitude reflects how much consumers like the brand. These indicators are conceptually distinct, which justifies examining separate dimensions rather than treating brand perception as a single undifferentiated construct.

2.2.2 Determinants of Brand Perception and Customer Value Creation

Brand perception is shaped by multiple marketing actions. Roese (2023) argues that every tactical execution can contribute to brand image, including product design, service design, price, incentives, distribution, and communication.

Price and incentives may act as signals: all else equal, a higher price can suggest greater quality, while a lower price can suggest weaker quality (Roese, 2023).

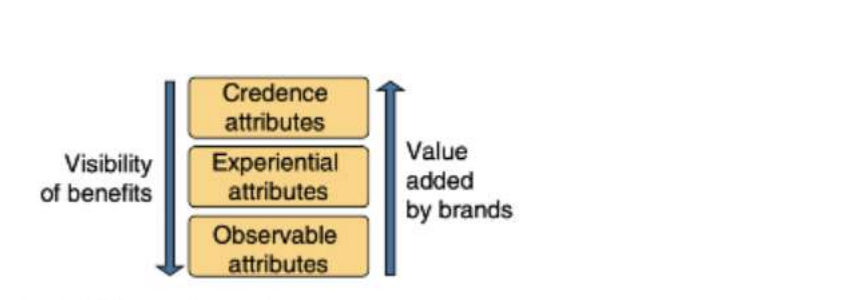
Distribution also contributes to perception because the places where a brand is purchased or encountered carry their own image, which can transfer to the brand itself.

Communication is especially important for the present research because every advertisement can contribute to the mental image of the brand. This principle links television visibility to long-term brand perception without reducing the effect of advertising to immediate sales outcomes.

Chernev (2023) explains that brands create value by helping consumers evaluate benefits that are not always directly observable. He distinguishes three types of attributes: observable attributes, which can be assessed before purchase; experiential attributes, which are revealed through use; and credence attributes, whose quality remains difficult to verify even after consumption.

The following figure illustrates the relationship between the observability of a product's benefits and the strategic role played by branding. It shows that as benefits become less observable, moving from functional to experiential to credence attributes, the role of the brand in creating market value increases proportionally.

Figure 3: Benefit visibility and brand impact



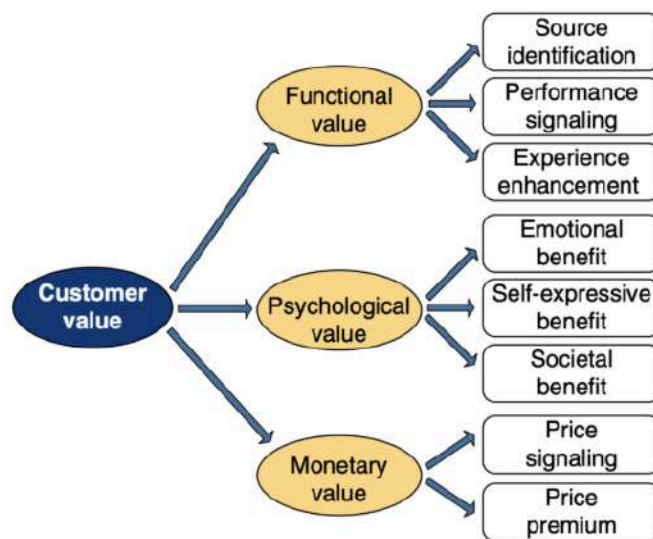
Source: Adapted from Chernev (2023, p. 175).

Figure 3 illustrates the principle that the less observable the benefits of an offering are, the more important the brand becomes in creating market value. Chernev (2023) describes this branding role as “making the invisible visible” (p. 174).

Brands create customer value across three complementary dimensions (Chernev, 2023). Functional value refers to practical utility such as performance, reliability, durability, and convenience. Psychological value concerns emotional experience, identity, and social meaning. Monetary value relates to price, fees, discounts, and perceived value for money. Brand perception contributes to each of these dimensions by signaling performance, shaping associations, and positioning the brand economically.

The following figure represents the three dimensions of customer value that brands create: functional, psychological, and monetary. It illustrates how brand perception contributes to each dimension and ultimately shapes consumer behavior and company value.

Figure 4: Brands as a means of creating customer value



Source: Adapted from Chernev (2023, p. 178).

Figure 4 summarizes the functional, psychological, and monetary dimensions of customer value. The contribution of branding varies according to the product category, consumer expertise, and the degree to which performance is observable. When expertise is lower and performance is harder to evaluate, the brand plays a stronger role in value creation (Chernev, 2023).

The same logic also explains the relationship between brand power and brand equity. Brand power refers to the differential effect of brand knowledge on consumers' responses to marketing

activities, whereas brand equity represents the monetary value attached to brand ownership (Chernev, 2023). Positive brand perception therefore becomes a mechanism through which communication can generate customer and company value.

The following figure illustrates the chain linking branding activities, brand image, customer value creation, consumer behavior, and brand equity. It positions brand power as the mechanism through which favorable brand perception translates into measurable commercial and financial outcomes.

Figure 5: Brand power and brand equity



Source: Adapted from Chernev (2023, p. 186).

Figure 5 links branding activities, brand image, customer value, consumer behavior, and company value. It shows that favorable brand perception does not remain purely psychological; it can influence market behavior and ultimately contribute to brand equity.

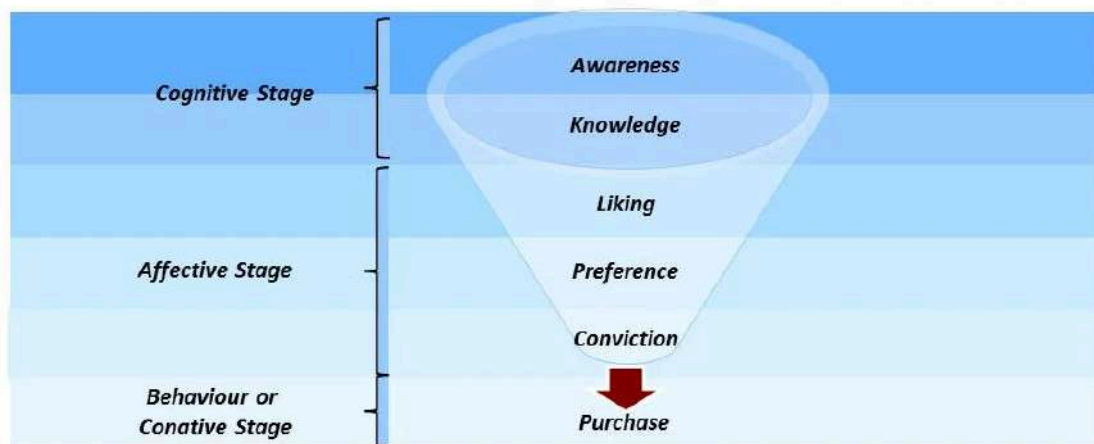
2.2.3 Consumer Behavior and Its Link to Brand Perception

Consumer behavior encompasses the actions, decisions, and responses of individuals when facing products, services, experiences, or ideas (El Gozmir & Chouhbi, 2023). Brand perception is one of its key components because it shapes choice, loyalty, and recommendation behaviors. The models below explain how television visibility can influence consumer behavior through its effect on perception.

Lavidge and Steiner's (1961) hierarchy-of-effects model describes the stages through which consumers move from advertising exposure to purchase: awareness, knowledge, liking, preference, conviction, and purchase. This sequence aligns closely with the four dimensions examined in the study, especially the progression from awareness to preference.

The following figure illustrates the hierarchy-of-effects model and its six sequential stages from advertising exposure to purchase. Each stage corresponds to a measurable dimension of brand response.

Figure 6: The Hierarchy-of-Effects Model



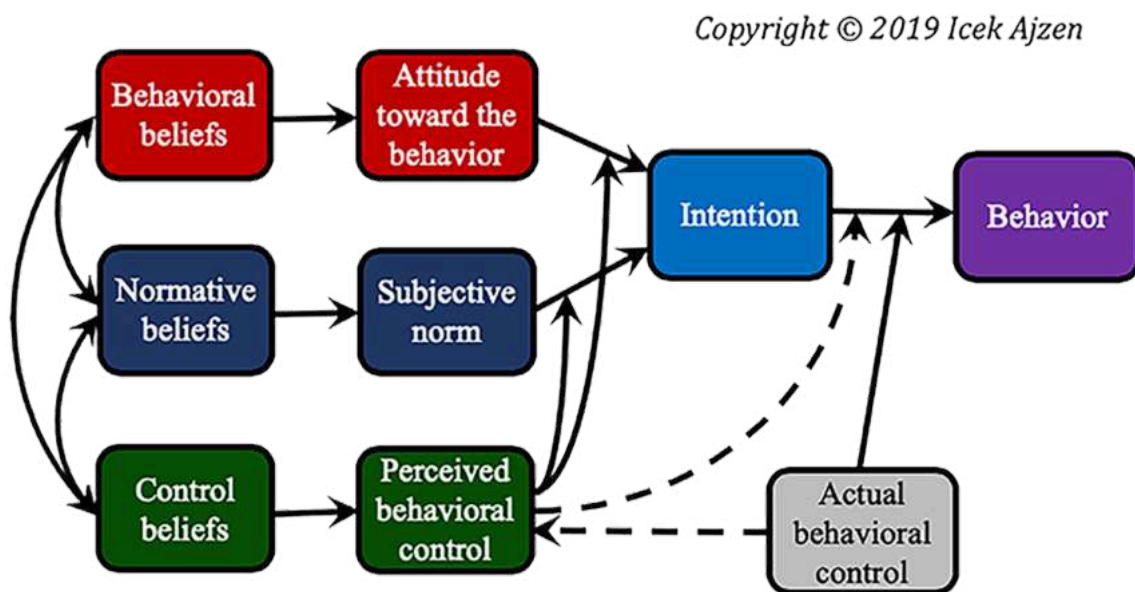
Source: Adapted from Lavidge and Steiner (1961).

As shown in Figure 6, awareness and knowledge form the foundation upon which higher-order perceptions such as liking, preference, and conviction are progressively built. Sustained television visibility contributes directly to the early stages by increasing exposure and familiarity, which can later support stronger brand preference.

Ajzen's (1991) theory of planned behavior identifies three antecedents of behavioral intention: attitude toward the behavior, subjective norm, and perceived behavioral control. In the context of brand perception, advertising exposure and brand associations contribute mainly to the attitude component, which then influences intention and preference.

The following figure illustrates the Theory of Planned Behavior, including the three antecedents of behavioral intention: attitude toward the behavior, subjective norm, and perceived behavioral control.

Figure 7: Theory of Planned Behavior



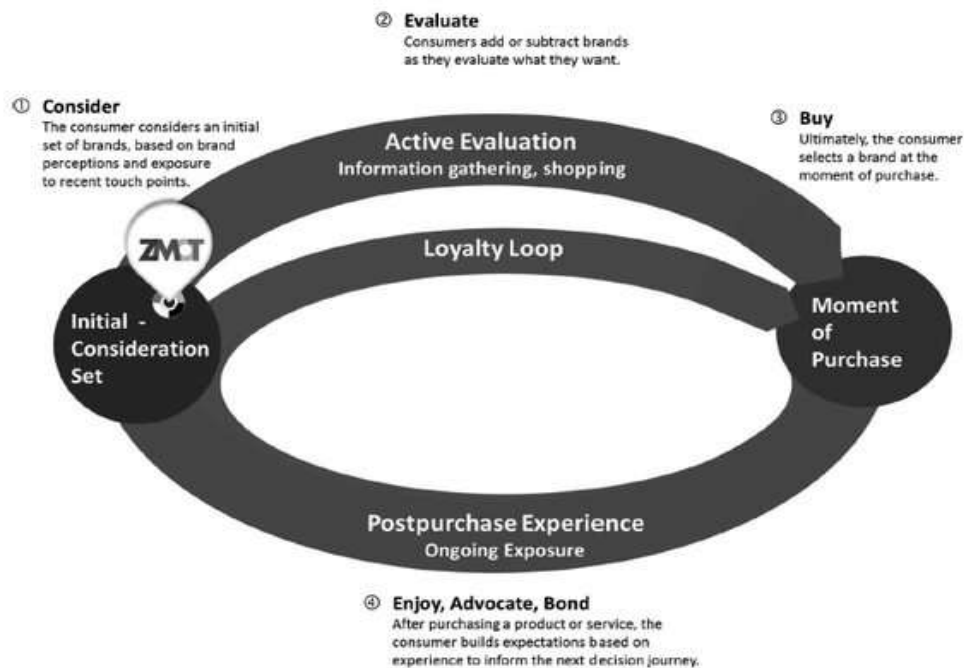
Source: Adapted from Ajzen (1991).

As shown in Figure 7, attitude plays a central role in transforming brand perception into behavioral intention. For Ooredoo, consistent television visibility may contribute to favorable attitudes, which can then support preference for the brand.

Court et al. (2009) replace the traditional linear purchase funnel with a circular consumer decision journey composed of initial consideration, active evaluation, moment of purchase, and post-purchase experience. Television advertising can influence several of these stages, particularly initial consideration and post-purchase salience.

The following figure illustrates the consumer decision journey, a circular model reflecting the ongoing nature of consumer-brand interactions.

Figure 8: The Consumer Decision Journey



Source: Adapted from Court et al. (2009).

As illustrated in Figure 8, television advertising intervenes at multiple stages of the decision journey. During initial consideration, awareness and image influence which brands enter the evaluation set. After purchase, continued visibility can reinforce satisfaction and preference. This model supports the idea that media effects are cumulative rather than limited to a single exposure.

2.3 Television Advertising and Media Visibility

Television advertising remains one of the most influential mass media channels for building brand visibility and shaping consumer perceptions. This section presents the key concepts related to television advertising as the medium through which perceived advertising visibility is measured in the study.

2.3.1 Definition and Characteristics of Television Advertising

Advertising is generally defined as the paid presentation and promotion of ideas, goods, services, and brands by an identified sponsor (Kotler et al., 2021). Television is considered

particularly powerful because it combines sight, sound, and motion, enabling broad reach and emotional engagement.

This definition is consistent with specialized dictionaries and advertising literature. The Oxford Dictionary of Media and Communication (2020) defines television advertising as advertising that uses television to reach a mass audience. A Dictionary of Marketing (2016) similarly describes it as the broadcasting of promotional messages to a large public, while George and Michael Belch (2018) emphasize its paid, non-personal, and broadcast nature.

Table 4: Advantages and Disadvantages of Television Advertising

Advantages	Disadvantages
High reach and low cost per exposure	High absolute cost (production and airtime)
Combines sight, sound, and motion for emotional engagement	High clutter: many ads compete for attention
Demonstrates product attributes and usage	Fleeting exposure: the message is short-lived
Builds brand image and personality effectively	Less audience selectivity: difficult to target very specific segments
Creative impact: sound and image interaction offers flexibility	Zapping and zipping: viewers avoid ads by changing channels or fast-forwarding
Captivity and attention during program breaks	Limited attention and potential consumer distrust

Source: Adapted from Kotler and Keller (2016) and Belch and Belch (2018).

Table 4 summarizes the main advantages and disadvantages of television advertising. On the one hand, television offers high reach, emotional engagement through sight and sound, product demonstration, and strong brand-building potential. On the other hand, it involves high production and airtime costs, limited targeting, advertising clutter, message fleetingness, and avoidance behaviors such as zapping. These characteristics influence how television visibility should be interpreted compared with other media.

In mature and oligopolistic markets such as Algerian telecommunications, where mobile penetration is high and service differentiation is limited, television advertising plays a decisive role in maintaining visibility and competitive positioning. By reaching large audiences and using emotional, rational, or family-oriented messages, operators can shape consumer perceptions and defend their place in the market.

The Algerian television context also requires attention to exposure quality. Tabet Aoul's (2020) empirical study shows that Algerian consumers are strongly confronted with TV advertising and that perceived clutter is associated with repetition, excessive volume, and long commercials. These findings contextualize Ooredoo's television SOV: strong media presence may create brand salience, but it must remain memorable, credible, and relevant rather than merely repetitive or intrusive.

Conclusion of Chapter I :

This chapter has established the theoretical foundations necessary to understand how television advertising visibility functions as a strategic lever within a competitive environment. By analyzing Share of Voice (SOV) through the lens of the Double Jeopardy Law and the concept of Excess Share of Voice, it becomes evident that for a brand like Ooredoo, maintaining a media presence that exceeds its market share is a prerequisite for long-term mental availability and commercial growth.

The exploration of consumer-based brand perception clarified how this visibility translates into market value through four interconnected dimensions: brand awareness, brand image, perceived quality, and brand preference. Following the framework provided by George Belch and Michael Belch (2018), which emphasizes the paid, non-personal, and broadcast nature of the medium, this research utilized models such as the Hierarchy-of-Effects and the Consumer Decision Journey to demonstrate that television advertising acts as a critical catalyst at every stage of the consumer-brand relationship.

Furthermore, the analysis of the Algerian telecommunications sector highlights that in a mature and relatively homogeneous market, the quality and frequency of visibility become the primary differentiators for operators like Mobilis, Djezzy, and Ooredoo. While television offers a unique capacity for mass reach, the theoretical framework also acknowledges the moderating role of advertising clutter and consumer resistance, which can impact the effectiveness of even the most intensive campaigns.

Building upon these theoretical pillars, the following chapter will transition from conceptualization to empirical validation. By moving into the Methodological Framework and Organisational Context, this study will outline the approach used to quantitatively test whether

Ooredoo's perceived television visibility is directly reflected in the awareness, image, quality, and preference levels of Algerian consumers.

CHAPTER II: METHODOLOGICAL FRAMEWORK AND ORGANISATIONAL CONTEXT

Introduction

This chapter presents the methodological framework adopted to examine the impact of television media Share of Voice on consumer-based brand perception in the case of Ooredoo Algeria. It first contextualizes the research through the presentation of IMMAR Research & Consultancy and Ooredoo Algeria, then explains the quantitative research design, the questionnaire, the sampling procedure, the data collection process, and the statistical tools used for the empirical analysis. The methodology combines descriptive analysis conducted with SPSS and final hypothesis testing conducted with SmartPLS 4 through the PLS-SEM approach.

Section 1: Company Presentation and Study Context

This first section provides the contextual background of the study. It presents IMMAR Research & Consultancy as the professional setting of the internship and as a key actor in media audience measurement and advertising monitoring in Algeria. It also introduces Ooredoo Algeria, the case study of this research, and explains why the Algerian telecommunications market represents a relevant context for analyzing the relationship between television visibility and consumer-based brand perception.

1.1 IMMAR Research & Consultancy

The following sub-sections provide a comprehensive overview of IMMAR Research & Consultancy. We begin by tracing the company's historical trajectory and its evolution within the Maghreb market, followed by an analysis of its organizational structure and the extensive portfolio of national and international clients that define its market leadership.

1.1.1 Presentation of the Company

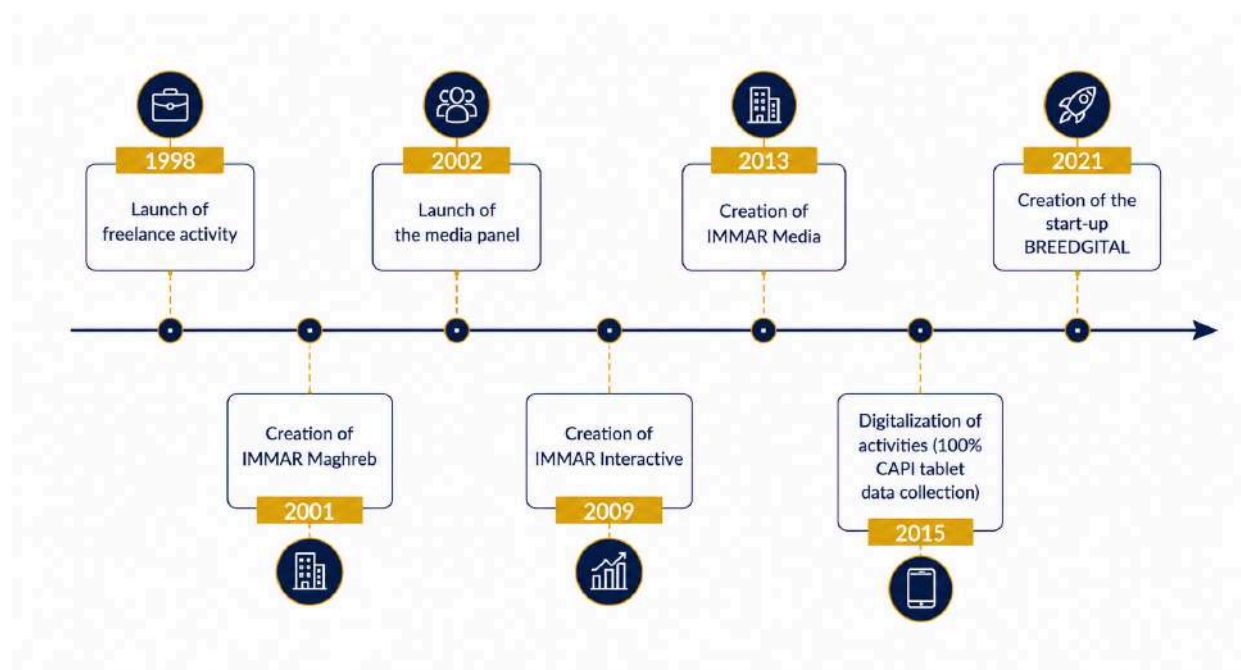
IMMAR Research & Consultancy is an Algerian research and consultancy firm specializing in opinion polling, marketing and media research, and data analytics. It serves national and international companies and institutions by providing both qualitative and quantitative research solutions tailored to their specific needs. Founded in 1998 as a freelance activity, IMMAR has grown over more than two decades into a structured, multidisciplinary research organization.

Key milestones in its development include the creation of IMMAR Maghreb in 2001,

IMMAR Media in 2002, IMMAR Interactive in 2009, the full digitalization of its data collection operations through 100% CAPI tablet in 2013, the launch of its media panel in 2015, and more recently the creation of BREEDGITAL, a digital start-up subsidiary, in 2021 (IMMAR Media Maghreb Management, 2026).

The figure below traces the key development stages of IMMAR since its founding in 1998, highlighting the successive expansions that shaped the company into the multi-disciplinary research organization it is today.

Figure 9: Historical Milestones of IMMAR Research & Consultancy (1998-2021)

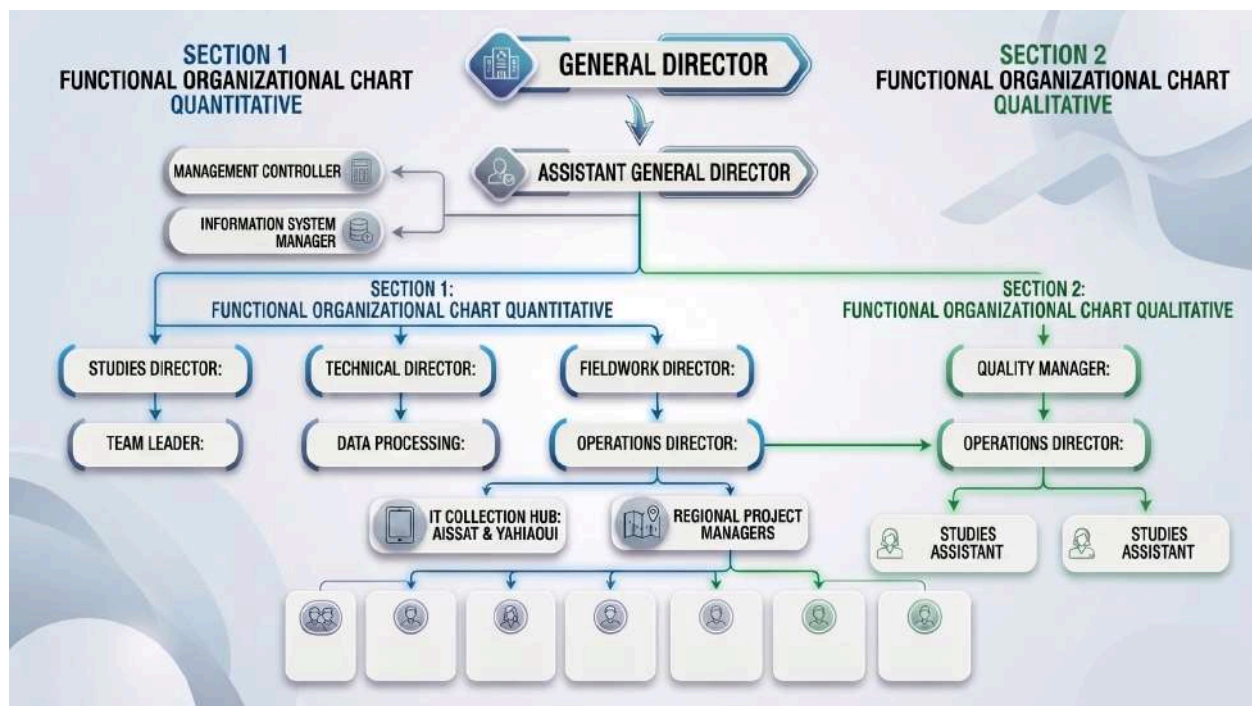


Source: IMMAR Media Maghreb Management, 2026

The company's organizational model is built around a combination of permanent in-house teams and specialist consultant expertise, supported by local field teams that ensure strong regional coverage across Algeria. In terms of operational capacity, the firm conducts over 500,000 interviews per year, relies on a network of 300 field investigators equipped with 300 tablets, operates 50 CATI positions, manages 4 data servers, and employs 95 staff members, of whom 25 are senior executives and 15 have over 10 years of experience within the firm. Built on 25 years of practice, IMMAR's core values of quality, collaboration, research and innovation, and commitment form the shared foundation that guides the decisions and behaviors of all its collaborators.

The following figure presents the internal organizational structure of IMMAR, illustrating the distribution of its teams and the hierarchical relationships between its various departments.

Figure 10: Organizational Chart of IMMAR Research & Consultancy



Source: IMMAR Media Maghreb Management, 2026

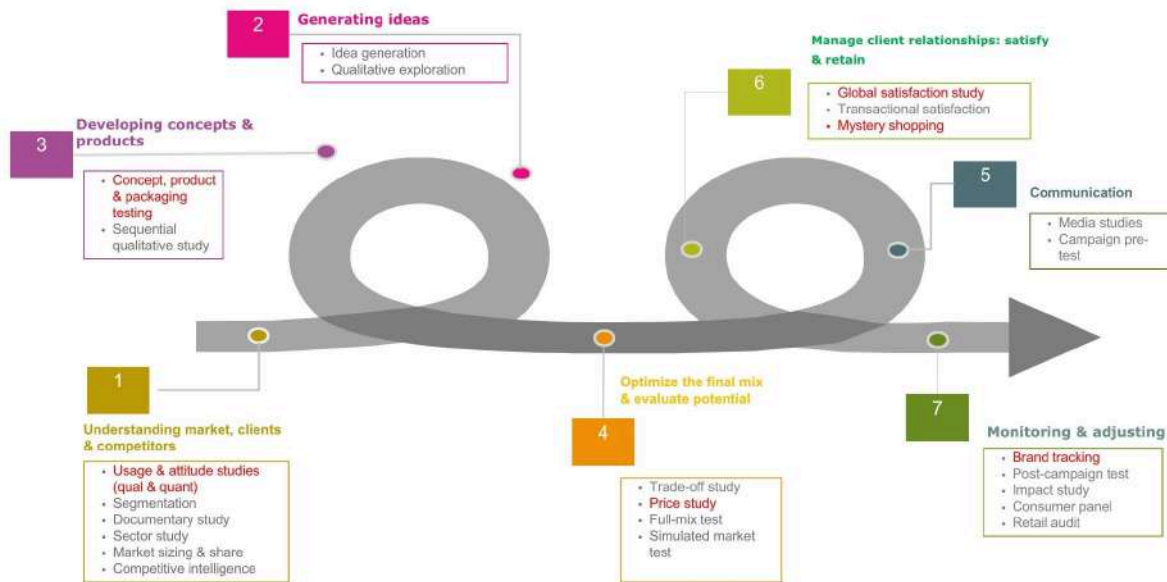
1.1.2 Competencies and Activities

IMMAR accompanies its clients at every stage of their commercial activity, offering tailored research solutions organized around seven strategic axes: understanding markets and consumers, generating ideas, developing concepts and products, optimizing the final mix, communicating effectively, managing client relationships, and tracking and adjusting performance over time. This approach covers a wide range of methodologies, including usage and attitude studies, segmentation, trade-off and pricing studies, satisfaction surveys, mystery shopping, media studies, pre-campaign and post-campaign testing, brand tracking, and retail audits.

The figure below illustrates the seven strategic axes around which IMMAR structures its research offer, covering every stage of a client's commercial activity from market

understanding through to performance tracking.

Figure 11: Research Services Offered by IMMAR Across the Client Journey



Source: IMMAR Media Maghreb Management, 2026

Beyond these traditional research methods, IMMAR has developed a set of digital and data science capabilities that sets it apart from conventional research firms. These cover cross-media studies, social listening and e-reputation analysis, CRM and digital journey platforms, business intelligence and data visualization tools, and predictive modeling. The company combines these multiple data sources to provide clients with a 360° view of their market performance, integrating consumer studies, retail studies, media audience data, advertising monitoring, social listening, and business intelligence into a single analytical framework.

The following table presents the range of data sources combined by IMMAR to deliver a 360° view of market performance, integrating consumer, retail, media, and digital data into a single analytical framework.

Table 5: IMMAR's Multi-Source Data Integration Model

Process Stage	Elements & Steps
Data Sources	Consumer studies, social listening, retail studies, mystery shopping, media audience measurement, advertising monitoring, and media monitoring
Processing	Analysis, dashboards, and business intelligence
Output	Insights and recommendations

Source: IMMAR Media Maghreb Management, 2026

The table below brings together these different dimensions into a structured overview of IMMAR's main areas of activity, detailing the key services associated with each.

Table 6: Main Activity Areas of IMMAR Research & Consultancy

Activity Area	Key Services
Consumer Research	Qualitative & quantitative studies, segmentation, U&A
Media Audience Measurement	Media panel, cross-media studies, advertising monitoring
Social Listening	E-reputation analysis, semantic analysis
Brand & Communication Tracking	Brand tracking, pre/post-test campaigns, impact studies
Data Analytics & BI	Dashboards, data science, CRM analysis
Client Experience	Mystery shopping, satisfaction studies, feedback management

Source: Adapted from IMMAR credentials document, 2026

IMMAR's expertise spans a wide range of sectors, as reflected in its client portfolio. The firm works with leading national and international organizations across telecommunications, banking, consumer goods, retail, and public institutions. This diversity illustrates both the versatility of IMMAR's research offer and the confidence that major market players place in its methodological standards, as shown in the table below.

Table 7: IMMAR Client References by Sector

Sector	Brands & Logos Identified
Automotive	Renault, Peugeot, Citroën, Mercedes-Benz / AMS-MB, SOVAC (VW, Skoda, SEAT, Audi), Nissan, KIA
Energy, Industry & Utilities	Naftal, Total, MFG (Mediterranean Float Glass), Shell, Lafarge, OXXO, Schneider Electric, Michelin, SEAAL, SEOR
Telecom & Electronics	Ooredoo, Djezzy, Mobilis, Algérie Télécom, Huawei, Brandt, Condor
Food & Beverage	Danone, Rouiba, Cevital, LU, Soummam, Bel, Blédina, Gallina Blanca, Romasidor, Nestlé, Lactalis International, Celia, Mio bébé, Ifri
Hygiene, Home & Personal Care	Faderco, Sancellia Tunisie, Unilever, Hayat, Henkel
Banking & Insurance	BNP Paribas, Cardif, Société Générale, AGB, GAM Assurances, Alliance Assurances
Media & Broadcasting	EPTV, El Djazairia, BBC, DW, TV5MONDE, CANAL+, Nessma, BBC WORLD, Ennahar TV, Echorouk TV
Pharmaceutical & Health	Novartis, URGO, Bayer, Pfizer, UNOP, Sanofi
Retail, Transport & Other	Carrefour, Uno Shopping Center, SETRAM, GIZ, KAIP

Source: Adapted from IMMAR Media Department, 2026

The internship carried out at IMMAR Research & Consultancy provided a relevant

professional setting for this research. IMMAR's expertise in media monitoring, advertising investment tracking, audience measurement, and brand tracking offers a strong contextual basis for understanding how media visibility can be studied in the Algerian television market. However, in the empirical part of this thesis, Share of Voice is operationalized as perceived television visibility through the questionnaire rather than as an official GRP or advertising investment ratio. IMMAR's relevance therefore lies mainly in its methodological and sectoral expertise, which helped frame the analysis of Ooredoo's television visibility and consumer brand perception.

1.2 Presentation of Ooredoo Algeria

Ooredoo Algeria constitutes the case study at the heart of this research. As the subject of the quantitative analysis conducted in the following chapter, it is necessary to briefly introduce the company, its history, and its positioning within the Algerian telecommunications market, before examining the impact of its television media Share of Voice on consumer-based brand perception.

1.2.1 The Ooredoo Group

Ooredoo is an international telecommunications group offering mobile and fixed telephony, high-speed internet, and enterprise solutions across markets in the Middle East, North Africa, and Southeast Asia, including Qatar, Kuwait, Oman, Algeria, Tunisia, Iraq, Palestine, the Maldives, and Indonesia. The group traces its origins to Qatar Telecom (Qtel), founded in 1949, and Wataniya Telecom, founded in 1999. A major turning point came in March 2007, when Qatar Telecom acquired a majority stake in Wataniya Telecom, consolidating its regional expansion strategy. On February 25, 2013, the group officially rebranded as Ooredoo, a name meaning "I want" in Arabic, with the new identity gradually rolled out across all subsidiaries. By the end of that year, the group had surpassed 90 million customers worldwide.(Ooredoo, 2026).

1.2.2 Ooredoo Algeria: Overview and Key Figures

In Algeria, the company was originally established under the name Wataniya Telecom Algérie (WTA), operating commercially under the brand Nedjma from August 2004. It was the first multimedia mobile telephony operator in the country. On November 21, 2013, Nedjma

officially became Ooredoo Algeria, aligning with the group's global rebranding. The operator subsequently launched its 3G network in December 2013 and its 4G network in July 2016, with 4G infrastructure extended to all 48 wilayas by 2018.

Today, Ooredoo Algeria is one of three major mobile operators competing in a highly saturated market alongside Mobilis and Djezzy. The company employs around 2,500 people, reported a revenue of 104.6 billion Algerian dinars in 2024, and serves a subscriber base of 14.7 million users, with network coverage reaching 99% of the population. Its head office is located in Cheraga, Algiers.

The table below presents the key institutional and commercial characteristics of Ooredoo Algeria, offering a concise overview of the operator's profile and its current positioning in the Algerian telecommunications market.(Ooredoo, 2026).

Table 8: Ooredoo's Algeria Key Indicators (January 2026)

Date of creation	August 25, 2004
Legal form	Public limited company (S.P.A)
Slogan	Ooredoo, upgrade your world!
CEO	<u>Roni Tohme</u> (1 août 2023-)
Head office	66, Route d'Ouled Fayet 1614 Cheraga
Activity	Telecommunications operator
Products	Mobile telephony HSPA+ 3G++ 4G LTE (Long Term Evolution) 5G Push-to-talk Mobile phones
Workforce	2500
Website	http://choof.ooredoo.dz
Former name	Nedjma (2004-2013)
Revenue	119.1 billion (2025) +13,9 % growth compared to 2024
Subscriber base	15.32 million (2025)

Source: Internal HR document, Ooredoo Algeria, 2026

The company's identity is built around three core values: Caring, reflecting its commitment

1.3 The collaboration between IMMAR and Ooredoo

The choice of Ooredoo Algeria as the central case study is consistent with the professional context of the internship and with the importance of media monitoring in the Algerian telecommunications sector. Ooredoo operates in a market where communication visibility is a major lever of differentiation, while IMMAR's expertise provides a useful background for understanding how such visibility is measured and interpreted.

Within the Algerian telecommunications market, television remains a central medium for competitive visibility. IMMAR's monitoring of the media landscape provides a professional understanding of how operators such as Ooredoo, Mobilis, and Djezzy compete for audience attention. In this research, this context supports the interpretation of television Share of Voice, while the empirical measurement remains based on consumers' perceived exposure to Ooredoo's television advertising.

1.3.1 IMMAR's Operational Approach to Television Share of Voice

Based on the information collected from IMMAR's media manager, IMMAR's role in television Share of Voice is primarily technical and measurement-oriented. The company calculates and reports media indicators, often with short operational remarks, but it does not conduct the full strategic interpretation of campaign effectiveness for the advertiser. In other words, IMMAR provides the measurement base, while the analysis of whether the campaign was effective remains the responsibility of the client, the advertiser, or the media agency.

According to the media manager, television SOV calculation is based on the crossing of two professional data sources: advertising monitoring and audience measurement. Advertising monitoring, commonly referred to as "*pige publicitaire*", consists of recording the passages of advertising spots by identifying the advertiser, brand, sector of activity, television channel, time slot, frequency, and duration of each insertion. Audience measurement provides the audience value associated with the programs or time slots in which those insertions appear. The operational calculation follows internationally recognized media-planning standards. In this research, the exact internal calculation procedure is not reproduced; it is used only to clarify the professional logic behind television SOV.

A central point is that SOV is calculated by sector of activity. Therefore, when this logic is applied to the Ooredoo case, the relevant comparison is not the whole advertising market, which includes several hundred advertisers from different sectors, but the telecommunications sector and its main competing operators, mainly Mobilis and Djezzy. This sector-based calculation is what makes the indicator meaningful for competitive positioning, because it shows a brand's relative media pressure inside its own competitive category.

The media manager also clarified the distinction between gross visibility and advertising Share of Voice. A gross form of presence may correspond to a share of diffusion, such as the share of spots or airtime generated by a brand within a given sector. However, Share of Voice follows a general calculation rule: it is obtained by dividing a brand's media weight by the total media weight of all brands in the same category, then multiplying the result by 100. The basic formula is therefore:

$$SOV = \left(\frac{\text{Brand's media weight}}{\text{Total category media weight}} \right) \times 100$$

Depending on the available data and the media channel studied, media weight may be expressed in advertising expenditure, number of spots, airtime, impressions, or audience-based indicators. In professional television media planning, advertising Share of Voice is generally assessed through audience-based indicators such as GRP, or Gross Rating Point, because GRP integrates the audience weight of advertising exposure. GRP expresses the accumulated audience weight of advertising passages. The basic calculation rule is the following:

$$GRP = \text{Reach (\%)} \times \text{Average Frequency}$$

It can also be calculated by adding the audience ratings of all advertising insertions:

$$GRP = \text{Rating of spot 1} + \text{Rating of spot 2} + \text{Rating of spot 3} + \dots$$

In this logic, one GRP corresponds to one percent of the target population exposed to the advertising message. For example, if an advertising campaign reaches 40% of the target audience with an average frequency of 3 exposures, the campaign generates 120 GRPs. Therefore, in the case of a telecommunications operator such as Ooredoo, television Share of Voice can be evaluated by comparing its total GRPs with the total GRPs generated by all competing operators within the telecommunications sector, according to the following rule:

$$TV\ SOV = \text{Brand's GRP} / \text{Total telecommunications sector GRP} \times 100$$

The calculation is therefore both sector-based and competitor-based. The objective is not to evaluate a brand's Share of Voice among all advertisers in the entire market, but rather within its own competitive sector. Applied to this research, this means that Ooredoo's television visibility is understood in relation to direct competitors such as Mobilis and Djezzy. The resulting indicator makes it possible to assess whether a brand's media presence is strong or weak relative to competing operators. However, the media manager emphasized that the SOV figure itself is not sufficient to judge communication effectiveness: it indicates media weight, but it does not explain whether the campaign has changed consumer perception or generated brand preference.

It should also be noted that the direct collaboration between Ooredoo and IMMAR is not presented here as a current active partnership. According to the information collected, the direct collaboration dates back to previous years, while IMMAR may still provide indirect visibility through its general market monitoring and sector-based advertising measurement activities. Therefore, IMMAR's contribution in this research is used mainly to understand the professional logic of television SOV calculation, rather than to claim an ongoing direct evaluation of Ooredoo's campaigns.

Finally, IMMAR's approach confirms that SOV alone is not sufficient to judge advertising effectiveness. A high SOV indicates relative media pressure, but it does not automatically prove that the campaign was well targeted, creatively effective, or capable of improving brand perception. The strength of the SOV also depends on the quality of its GRP base, the relevance of the target audience, the choice of time slots, the campaign objective, and the creative

message. This distinction is important for the present research: professional SOV is an objective media indicator based on GRP and audience ratings, whereas the empirical model in this thesis measures perceived television SOV through consumer responses. The objective professional indicator explains the media logic, while the questionnaire captures how consumers perceive Ooredoo's television visibility and how this perception relates to brand awareness, brand image, perceived quality, and brand preference.

Section 2: Methodology and Data of the Study

This section presents the methodological approach adopted to conduct the empirical part of the research. To address our research problem and test our theoretical model, we employed a quantitative method grounded in a hypothetico-deductive approach. The purpose of this section is to explain the research design, the construction of the questionnaire, the operationalization of the variables, the sampling procedure, the data collection process, and the statistical tools used to analyze the data. This research combines SPSS for descriptive analysis with SmartPLS 4 for the final PLS-SEM analysis. This dual treatment ensures both a clear description of the sample and a rigorous test of the conceptual model.

2.1 Research Methodology

According to Creswell (2014), quantitative research is appropriate when the researcher seeks to test objective theories by examining the relationships among variables. These variables are measured through instruments, and the resulting numerical data are analyzed using statistical procedures. In the same perspective, he explains that survey research provides a quantitative or numeric description of trends, attitudes, or opinions of a population by studying a sample of that population, often through questionnaires or structured interviews.

In this research, a quantitative methodology grounded in a hypothetico-deductive approach was adopted. As noted by Saunders, Lewis, and Thornhill (2019), the deductive approach begins with the development of a theoretical framework and specific hypotheses derived from existing literature, which are subsequently tested against empirical reality. This choice is highly

appropriate for this study, as it seeks to test hypotheses derived from the conceptual framework regarding whether perceived television Share of Voice is associated with stronger dimensions of consumer-based brand perception, namely Brand Awareness, Brand Image, Perceived Quality, and Brand Preference.

To operationalize this hypothetico-deductive logic, the administration of a structured questionnaire was selected as the primary data collection tool. Malhotra (2010) emphasizes that questionnaires are particularly effective in marketing research because they allow for the collection of standardized, quantifiable data across a large sample. This standardization is essential for evaluating unobservable latent constructs such as consumer attitudes and brand equity dimensions. By using a questionnaire, the study successfully transforms consumers' subjective perceptions of Ooredoo into quantifiable data, enabling the statistical comparison of responses and the rigorous verification of the existence and strength of relationships between the constructs.

The study also follows a cross-sectional survey design, since the data were collected at a single point in time through the structured questionnaire. This design makes it possible to capture consumers' perceptions of Ooredoo's television visibility and their brand perceptions during the fieldwork period. The objective is therefore not to follow the evolution of perceptions over time, but rather to test whether a higher perceived television Share of Voice correlates with stronger Brand Equity dimensions in the current competitive context.

The empirical analysis follows a two-stage logic. First, SPSS outputs are used for the descriptive part of the study through frequencies, percentages, valid cases, missing values, and item means. Second, the final cleaned PLS-ready database is analyzed in SmartPLS 4 in order to assess the measurement model and test the structural relationships between perceived television Share of Voice and the four dimensions of consumer-based brand perception.

2.1.1 Construction and Structure of the Questionnaire

The questionnaire was developed from the literature review and the conceptual framework. The wording of the questions was adapted to the Algerian telecommunications context and to the specific case of Ooredoo. Closed-ended questions were preferred because they allow standardized responses, facilitate statistical processing, and are commonly used in quantitative marketing research to measure perceptions and attitudes (Pallant, 2020; Hair et

al., 2017). The items were also derived from established concepts in brand equity and media visibility, especially the consumer-based brand equity approaches of Aaker (1991) and Keller (1993).

The questionnaire was structured in a progressive way. It first verified the respondent's exposure to television and telecom advertising, then measured the main constructs of the research model, and finally collected socio-demographic information. This progression reduces respondent confusion and helps ensure that the perceptual items are answered by individuals who are sufficiently exposed to the phenomenon studied.

Table 9: Structure of the questionnaire

Part	Content	Objective
Preliminary section	Television viewing habits and exposure to telecom advertising	Verify the relevance of respondents for the study
Share of Voice section	Perceived presence, repetition, and visibility of Ooredoo TV advertising	Measure the independent variable
Brand Awareness section	Recognition and distinction of Ooredoo and its advertising	Measure the awareness dimension
Brand Image section	Trust, innovation, and positive image generated by Ooredoo advertising	Measure brand associations and image
Perceived Quality section	Quality, credibility, value for money, and satisfaction perceptions	Measure perceived service quality
Brand Preference section	Choice intention, recommendation, and preference for Ooredoo	Measure brand preference
Respondent profile	Age, gender, residence area, and current mobile operator used	Describe the sample and contextualize results

Source: Developed by the author.

Most attitudinal and perceptual items were measured using a five-point Likert scale ranging from strong disagreement to strong agreement. This scale is commonly used in marketing

and consumer behavior research because it allows respondents to express their degree of agreement while producing numerical data suitable for statistical analysis.

Table 10: Five-point Likert scale used in the questionnaire

Score	Response option	Interpretation interval	Admission level
1	Strongly disagree	[1.00 - 1.80[	Very low
2	Disagree	[1.80 - 2.60[	Low
3	Neutral	[2.60 - 3.40[	Medium
4	Agree	[3.40 - 4.20[	High
5	Strongly agree	[4.20 - 5.00]	Very high

Source: Developed by the author.

2.1.2 Validation of the Questionnaire

Before the final distribution, the questionnaire was reviewed to ensure clarity, relevance, and coherence with the research objectives. The objective of this validation stage was to verify whether the questions were understandable and whether each item corresponded to the theoretical construct it was supposed to measure.

A pre-test was conducted on a small group of respondents similar to the target population. This step made it possible to identify unclear wording, estimate the response time, and ensure that the questionnaire could be completed without major difficulties. After this review, minor wording adjustments were made before the questionnaire was distributed more widely.

The reliability of the measurement scales was assessed through Cronbach's Alpha and complementary PLS-SEM reliability indicators. Cronbach's Alpha is commonly used to evaluate the internal consistency of multi-item scales, while Composite Reliability is recommended in PLS-SEM because it takes into account the actual outer loadings of the indicators (Hair et al., 2017; Pallant, 2020). The final results showed acceptable reliability: Brand Awareness (alpha = 0.775), Brand Image (alpha = 0.884), Brand Preference (alpha = 0.853), and Perceived Quality (alpha = 0.866) were above the recommended threshold of 0.70. Share of Voice recorded a slightly lower value (alpha = 0.684), but it was retained because its Composite Reliability and AVE were acceptable in the final SmartPLS assessment.

2.2 Data of the Study

This section outlines the practical execution of the empirical research. It details the step-by-step process used to gather, prepare, and analyze the data necessary to test the research hypotheses. Specifically, it defines the target population and the sampling method employed to reach relevant Algerian consumers. It then describes the data collection procedure, including the deployment of the online questionnaire and the handling of missing data. Finally, it presents the statistical tools SPSS for descriptive profiling and SmartPLS 4 for structural equation modeling and the operationalization of the constructs, ensuring a transparent and rigorous transition from theoretical concepts to measurable empirical results

2.2.1 Target Population and Sampling Method

The target population of this study consists of Algerian consumers who are exposed to television advertising by mobile operators. More specifically, the study focuses on consumers who know Ooredoo or who are able to evaluate its advertising presence and brand perception in the Algerian telecom market. Age categories were collected in the questionnaire in order to describe the sample profile and identify the dominant respondent groups.

A non-probability convenience sampling method was used. This method was selected because it is practical for online questionnaire distribution and is frequently used in exploratory marketing research when access to a complete sampling frame is not possible (Pallant, 2020). Although this sampling technique does not guarantee perfect representativeness of the entire Algerian population, it allows the researcher to collect relevant responses from consumers who are exposed to the telecom market and able to evaluate Ooredoo.

After filtering respondents who answered “Non” to the television-screening question and retaining the cleaned PLS-ready responses, the final database used for the empirical analysis contains 138 valid responses. This sample size is acceptable for SmartPLS analysis because the structural model is simple, with one predictor (SOV) explaining four endogenous constructs. PLS-SEM is recognized as suitable for models estimated with relatively moderate sample sizes, especially when the objective is prediction and theory testing rather than

covariance-based model fit (Hair et al., 2017).

2.2.2 Data Collection Procedure

Data were collected through an online questionnaire. Online distribution was appropriate for this research because it allowed access to respondents from different geographical areas, facilitated rapid data collection, and ensured that responses were automatically recorded in a structured format suitable for SPSS and SmartPLS processing. This mode of collection is also consistent with quantitative survey designs used to evaluate consumer perceptions and attitudes.

The questionnaire included mostly mandatory answers, which reduced the risk of incomplete responses. After collection, the database was screened to verify the presence of missing values, incorrect entries, and inconsistent responses. This step is important because missing data can affect statistical analysis and reduce the quality of the results if it is not identified and treated before analysis. Graham (2009) emphasizes that missing data represent a common challenge in field research and that researchers must carefully consider how missingness is handled before conducting statistical analyses.

In this study, the missing values were limited and mainly concerned blank answers in the raw questionnaire file. These blank answers were treated before the statistical analyses through mean substitution, by replacing each missing value with the mean of its corresponding item/column. This procedure was used in order to preserve the same cleaned database for both SPSS descriptive analysis and SmartPLS PLS-SEM analysis. However, this choice is acknowledged as a practical treatment of limited missing values, since Graham (2009) notes that more advanced missing data procedures, such as multiple imputation or maximum likelihood methods, are generally preferred in more complex missing data situations.

2.2.3 Data Analysis Tools and Statistical Processing

The analysis was conducted using two complementary sources of output: SPSS for descriptive analysis and SmartPLS 4 for the final PLS-SEM analysis. SPSS was used to describe the sample profile, television exposure, operator usage, and the descriptive means of the Likert-scale items. SmartPLS 4 was then used to validate the measurement model and to test the hypotheses through the structural model.

Table 11: Data analysis plan

Stage	Tool/source	Purpose	Main indicators
Descriptive profile and exposure analysis	SPSS output	Describe respondents, operator usage, television exposure, and advertising behavior	Valid N, missing values, frequencies, percentages
Descriptive analysis of Likert-scale items	SPSS output	Summarize perceived SOV and the four brand-perception dimensions before model testing	Valid N, mean, construct-level descriptive synthesis
Measurement model assessment	SmartPLS 4	Assess reliability and validity of latent constructs	Outer loadings, Composite Reliability, AVE, HTMT
Structural model and hypothesis testing	SmartPLS 4 bootstrapping	Test the effect of perceived TV SOV on BA, BI, PQ, and BP	Path coefficient, t-value, p-value, R ² , f ²

Source: Developed by the author.

SPSS was used to prepare and describe the empirical database. The SPSS output provided the frequency distributions and percentages needed to present respondents' socio-demographic characteristics, television exposure, advertising exposure, operator usage, and the descriptive means of the questionnaire items. Descriptive statistics are appropriate at this stage because they summarize the structure of the sample and provide an initial reading

of the variables before inferential analysis (Field, 2018; Pallant, 2020).

However, SPSS was not used as the final hypothesis-testing method in this research. The descriptive outputs support the presentation of the data, while the hypotheses are tested through SmartPLS 4 using the PLS-SEM approach. This distinction is important because the research model includes latent constructs measured by several indicators, which requires a method capable of assessing both the measurement model and the structural model.

SmartPLS 4 was used to estimate the final model through the Partial Least Squares Structural Equation Modeling approach. PLS-SEM is particularly appropriate for this research because it allows the simultaneous estimation of the measurement model and the structural model. It is also suitable for exploratory and prediction-oriented research using latent constructs measured through multiple questionnaire items (Hair et al., 2017).

The PLS-SEM analysis followed two main stages. The first stage was the evaluation of the measurement model. This included indicator reliability through outer loadings, construct reliability through Cronbach's Alpha and Composite Reliability, convergent validity through AVE, collinearity through VIF, and discriminant validity through HTMT. The second stage was the evaluation of the structural model. This included path coefficients, statistical significance through bootstrapping, explained variance through R-square, and effect size through f-square.

Bootstrapping was used to assess the statistical significance of the relationships between constructs. The final SmartPLS analysis used 5,000 bootstrap samples, a two-tailed test, and a 5% significance level. A relationship was considered significant when the p-value was below 0.05 and the t-statistic was above 1.96. This procedure made it possible to test the four research hypotheses in a rigorous way.

The research model is built around one independent variable and four dependent dimensions. The independent variable is television Share of Voice (SOV), operationalized in this study as consumers' perceived visibility of Ooredoo on television compared with other mobile operators. The dependent variable is consumer-based brand perception, approached through four dimensions of Brand Equity: Brand Awareness, Brand Image, Perceived Quality, and Brand Preference.

In classical media planning, Share of Voice can be calculated as the advertising presence of a brand divided by the total advertising presence of the category, multiplied by 100. In this

dissertation, because the empirical model is based on survey responses, SOV is estimated at the perceptual level. IMMAR's media expertise provides the professional context for understanding television visibility, while the questionnaire captures how consumers perceive Ooredoo's television presence.

It is important to clarify that Brand Awareness, Brand Image, Perceived Quality, and Brand Preference are not treated as mediating variables in the final model. They represent the four dependent dimensions affected by television Share of Voice. This correction aligns the methodological framework with the final SmartPLS model and the hypotheses tested in Chapter III.

Table 12: Operationalization of the constructs in the final model

Construct	Role in the model	Final indicators	Meaning
Share of Voice (SOV)	Independent variable	SOV1, SOV2, SOV3, SOV4	Perceived television visibility, repetition, relative presence, and influence of Ooredoo advertising
Brand Awareness (BA)	Dependent dimension	BA1, BA2, BA3	Ability to recall, recognize, and distinguish Ooredoo as a telecom brand
Brand Image (BI)	Dependent dimension	BI1, BI2, BI3, BI4, BI5	Associations related to trust, innovation, positive image, favorable impression, and identification
Perceived Quality (PQ)	Dependent dimension	PQ1, PQ2, PQ3, PQ4	Perceived service quality, confidence, value for money, and expectations
Brand Preference (BP)	Dependent dimension	BP1, BP2, BP3	Preference, recommendation, and intention to choose or remain with Ooredoo

Source: Developed by the author.

In the latest SmartPLS model, the constructs were retained using the simplified item labels exported from the cleaned PLS-ready database: SOV1-SOV4 for perceived Share of Voice, BA1-BA3 for Brand Awareness, BI1-BI5 for Brand Image, PQ1-PQ4 for Perceived Quality, and BP1-BP3 for Brand Preference. Unlike the earlier version of the model, no additional

item deletion is reported in the final retained analysis. This updated nomenclature is used consistently in Chapter III.

Table 13: Methodological design of the empirical study

Element	Choice adopted in this research
Research approach	Quantitative approach
Research objective	Measure the impact of television Share of Voice on consumer-based brand perception of Ooredoo Algeria
Data collection tool	Structured online questionnaire
Target population	Algerian consumers exposed to mobile operator television advertising
Sampling method	Non-probability convenience sampling
Final valid sample	138 valid responses after filtering respondents who answered “Non” to the television-screening question
Main software used	Google Forms statistics for descriptive analysis and SmartPLS 4 for PLS-SEM
Main statistical approach	Descriptive statistics and Partial Least Squares Structural Equation Modeling (PLS-SEM)

Source: Developed by the author.

Conclusion of Chapter II

This chapter has successfully bridged the gap between the theoretical concepts established in Chapter I and the empirical reality of the Algerian telecommunications market. By first examining the organizational context, we demonstrated how IMMAR Research & Consultancy’s professional media-monitoring standards provide a rigorous backdrop for understanding Share of Voice. Simultaneously, we established Ooredoo Algeria as a highly relevant case study, operating in a saturated, oligopolistic market where communication visibility is a primary lever for competitive differentiation.

Transitioning from context to execution, the chapter outlined a robust quantitative, hypothetico-deductive methodology. A crucial operational choice was clarified here: while the industry defines television Share of Voice through objective metrics like GRPs, this research

adapts the construct to evaluate consumer-perceived visibility. Through a structured online questionnaire administered to a valid sample of 138 consumers, the study successfully translated abstract theoretical dimensions into quantifiable data, specifically perceived Share of Voice, Brand Awareness, Brand Image, Perceived Quality, and Brand Preference.

Finally, by defining a two-staged analytical strategy utilizing SPSS for descriptive sample profiling and SmartPLS 4 for rigorous PLS-SEM structural evaluation, this methodological framework ensures that the data will be analyzed with both descriptive clarity and statistical validity. With the organizational context defined and the methodological tools fully calibrated, the following chapter will proceed directly to the empirical analysis, testing the hypotheses to reveal the true impact of Ooredoo's television visibility on consumer-based brand perception.

CHAPTER III: ANALYSIS AND DISCUSSION OF RESULTS

Introduction

This chapter represents the empirical part of the research. Following the structure commonly used in applied marketing dissertations, it first presents the statistical results obtained from IBM SPSS Statistics, then evaluates the measurement and structural models using SmartPLS 4. SPSS is used here for the descriptive side of the analysis only: respondent profile, operator usage, television exposure, advertising behavior, and item-level means. SmartPLS is then used to assess reliability, validity, path coefficients, explanatory power, and hypothesis testing.

The chapter is divided into two sections. Section 1 presents and analyzes the empirical results, including the SPSS descriptive outputs and the SmartPLS measurement and structural model assessment. Section 2 discusses the findings in relation to the research problem, the hypotheses, the theoretical framework, and the managerial implications for Ooredoo Algeria.

Research hypotheses and model testing logic

The empirical model tests the direct effect of television Share of Voice on each Brand Equity dimension. The hypotheses were formulated as follows:

Table 14: Research hypotheses tested in the empirical model

Hypothesis	Relationship tested	Expected effect
H0	TV SOV -> Consumer-based brand perception	No significant effect
H1	TV SOV -> Consumer-based brand perception	Positive and significant effect
H1a	TV SOV -> Brand Awareness (BA)	Positive and significant effect
H1b	TV SOV -> Brand Image (BI)	Positive and significant effect
H1c	TV SOV -> Perceived Quality (PQ)	Positive and significant effect
H1d	TV SOV -> Brand Preference (BP)	Positive and significant effect

Source: Developed by the author

This structure is consistent with the objective of the study: identifying how television visibility contributes to the formation of consumer-based brand perception. Instead of treating Brand Equity as one aggregated variable only, SmartPLS enables the researcher to examine each dimension separately. This provides a more precise interpretation of the effects of advertising visibility.

Section 1: Presentation of the Results

This section is dedicated to the empirical presentation and analysis of the data collected during the field research. It is structured in a logical progression, beginning with the data screening and missing-value treatment to ensure the integrity and reliability of the database. Subsequently, it provides a descriptive overview of the respondents' socio-demographic profiles, their television exposure, and their general advertising behaviors. Following this descriptive phase, the section details the core statistical findings derived from the SPSS outputs and the SmartPLS 4 structural equation modeling. This includes a rigorous evaluation of the measurement model (focusing on construct reliability and validity) and the final testing of the structural model to validate the research hypotheses regarding Ooredoo's television Share of Voice and its impact on consumer-based brand perception.

1.1 Data Screening and Missing-Value Treatment

Before interpreting the empirical results, the database was screened and cleaned before conducting the analyses in SPSS and SmartPLS. This step was necessary because missing data represent a common issue in field research and may affect statistical analysis if they are not identified and handled appropriately (Graham, 2009). The frequency outputs reported 138 valid responses and 0 missing values for the main descriptive variables. In the raw questionnaire file, some isolated Likert-scale answers were blank. These missing answers were not treated through case deletion, in order to avoid losing valid respondents because of a limited number of unanswered items. Instead, each blank cell was replaced by the mean of its corresponding item/column. This mean-substitution procedure was applied before the SPSS analysis and before importing the dataset into SmartPLS, allowing the same cleaned sample to be retained for both analyses. However, following Graham's (2009) discussion of missing-data procedures, this choice is considered a practical treatment for isolated missing values rather than a general missing-data strategy, since more advanced methods such as multiple imputation and maximum likelihood are usually more appropriate for complex missing-data situations.

Table 15: Data screening and missing-value treatment before analysis

Step	Result	Interpretation
Database screening before analysis	Data checked and cleaned before analysis	The same cleaned dataset was used for SPSS and SmartPLS.
SPSS frequency output for main variables	138 valid responses; 0 missing values	Valid cases were reported for the main descriptive variables.
Initial Likert-scale item responses before treatment	Some blank answers observed in the raw questionnaire file	Limited item non-response appeared before treatment.
Treatment of missing Likert-scale values	Mean substitution applied	Each blank answer was replaced by the mean of the corresponding item/column.

Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

Table 15 shows that the database first presented 138 valid responses for the main socio-demographic, operator-usage and exposure variables. In the Likert-scale section, a limited number of blank answers was detected in the raw file before treatment, which explains the initial variation in valid N across items. To deal with these missing answers, mean substitution was applied: each blank cell was replaced by the mean response of the corresponding item/column. Therefore, the missing values did not lead to deleting respondents; the same cleaned dataset was used in SPSS and then imported into SmartPLS for the PLS-SEM analysis.

Concerning normality, a quasi-normality assessment was conducted using the SmartPLS output for the latent variable scores. Although PLS-SEM does not require strict multivariate normality, since it is commonly considered a non-parametric variance-based approach, examining skewness and excess kurtosis remains useful to verify that the data do not present severe distributional problems before interpreting the bootstrapping results (Hair et al., 2017).

Table 16: Quasi-normality assessment of the study constructs

Construct	N	Excess kurtosis	Skewness	Cramér-von Mises p-value	Assessment
Brand Awareness (BA)	138	1.320	-1.127	< 0.001	Acceptable quasi-normality; exact normality not assumed
Brand Image (BI)	138	0.116	-0.423	0.097	Acceptable
Brand Preference (BP)	138	-0.711	-0.254	0.018	Acceptable quasi-normality; exact normality not assumed
Perceived Quality (PQ)	138	-0.547	-0.123	0.130	Acceptable
Share of Voice (SOV)	138	0.217	-0.015	0.458	Acceptable

Source: Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

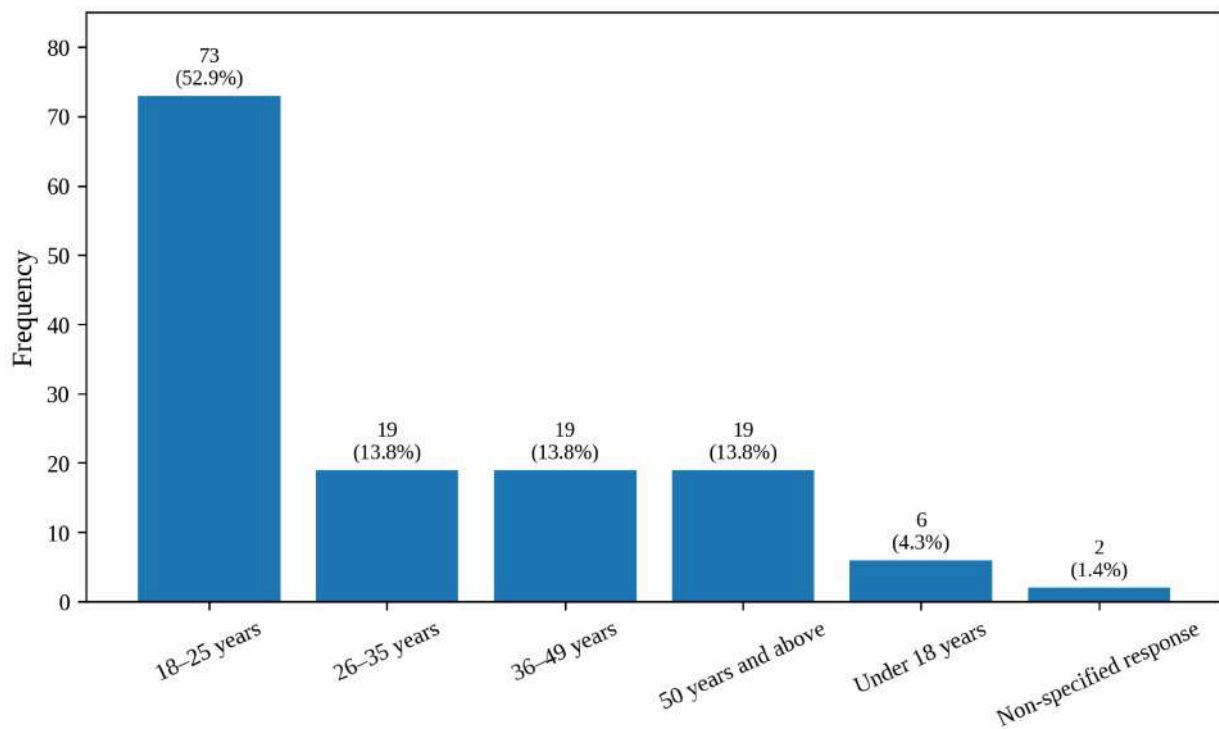
The results show that all constructs have skewness and excess kurtosis values within the commonly accepted range of -2 to +2, indicating that the data do not present severe distributional problems. According to George and Mallery (2010), skewness and kurtosis values between -2 and +2 are generally considered acceptable for assuming an approximately normal distribution. However, some Cramér-von Mises p-values are below 0.05, which means that exact normality should not be assumed. This does not represent a major methodological issue in the present study, since PLS-SEM is a variance-based approach that does not require strict multivariate normality, and the significance of relationships is assessed through bootstrapping

procedures that are suitable for non-normal data distributions (Hair et al., 2017; Hair et al., 2019).

1.2 Socio-Demographic Profile of Respondents

The socio-demographic profile is presented in order to contextualize the empirical results. This part describes age, gender, and geographical residence. These variables are not included as latent constructs in the SmartPLS model; their role is limited to describing the composition of the sample. The detailed distribution is provided in Appendix A to keep the results chapter concise.

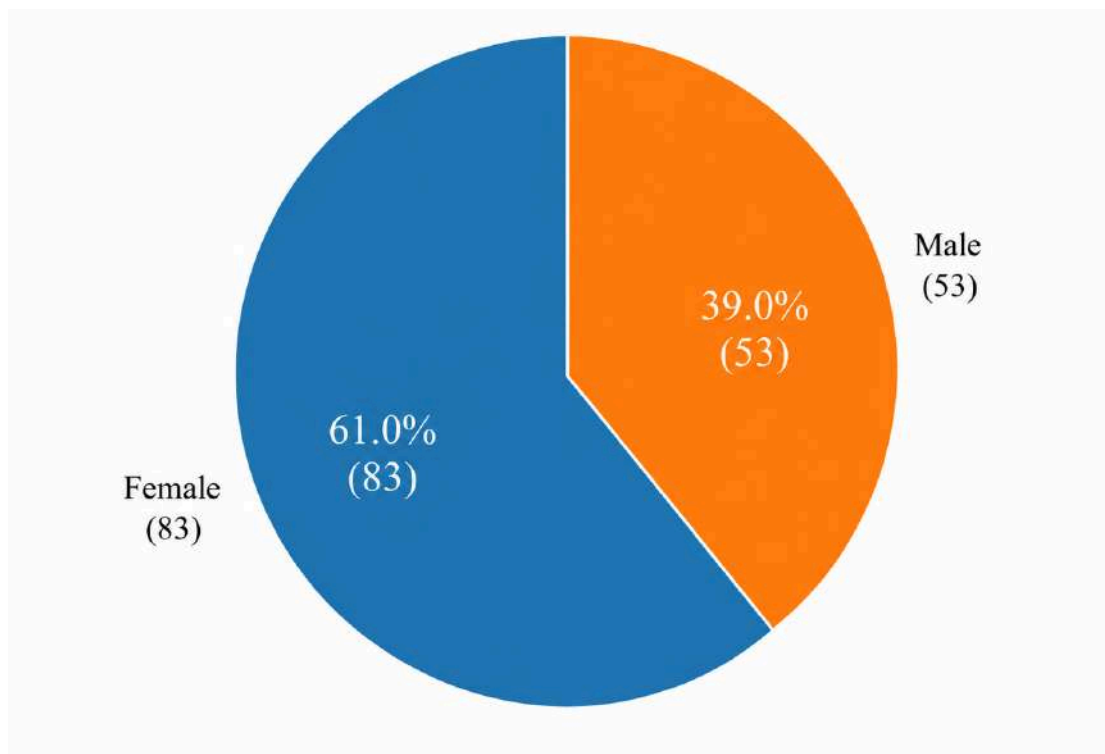
Figure 13: Distribution of respondents by age group



Source: Developed by the author based on the questionnaire results.

Figure 13 shows that the sample is mainly composed of young respondents. The 18–25 age group is the most represented category, accounting for 52.9% of respondents, which indicates that the study primarily reflects the perceptions of a young audience.

Figure 14: Distribution of respondents by gender



Source: Developed by the author based on the questionnaire results.

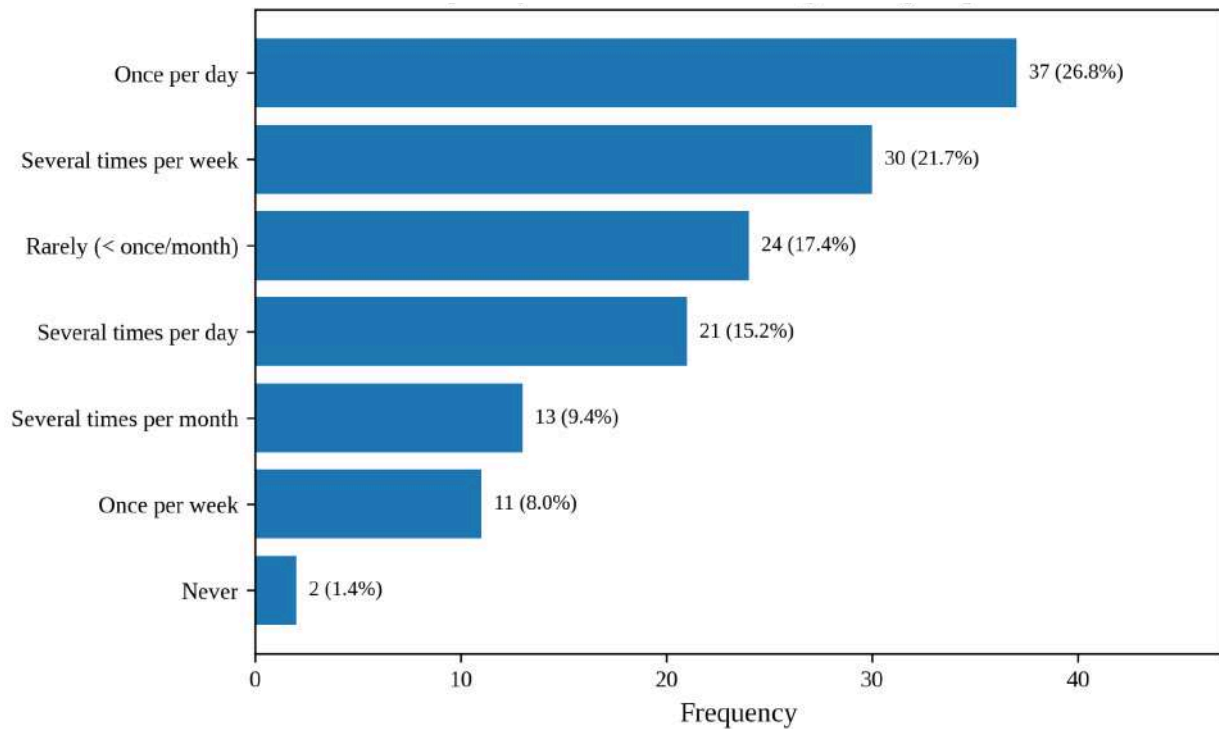
Figure 14 indicates that, among respondents who specified their gender, female respondents form the majority of the sample, representing 61.0%, while male respondents represent 39.0%. This suggests a slightly female-dominated sample, which remains useful for describing the overall respondent profile.

The respondent profile indicates that the sample is mainly young. The 18–25 age group represents 52.9% of respondents, while the categories 26–35, 36–49, and 50 years and above each represent 13.8%. Regarding gender, women represent 61.0% of the specified responses, while men represent 39.0%. Geographically, the sample is concentrated in the North of Algeria (71.7%), which reflects the convenience nature of the sampling method and should be considered when interpreting the generalizability of the results.

1.3 Television Exposure and Advertising Behavior

The second descriptive step concerns television exposure and advertising behavior. These elements are important because perceived Share of Voice can only be meaningfully assessed by respondents who are exposed to television and to mobile-operator advertising. The detailed distribution is provided in Appendix B to avoid overloading the main results chapter.

Figure 15: Frequency of television viewing among respondents



Source: Developed by the author based on the questionnaire results.

Figure 15 shows that television viewing remains relatively frequent among respondents. The most common patterns are watching television once per day (26.8%) and several times per week (21.7%), which confirms that the sample is sufficiently exposed to television for the study of media Share of Voice.

The results confirm that respondents are exposed to television and to telecom advertising with different levels of intensity. The most frequent television-viewing category is once per day (26.8%), followed by several times per week (21.7%), rarely (17.4%), and several times per day (15.2%). Regarding advertising avoidance, the largest group declares that they often watch television advertisements without zapping (29.0%), followed by rarely (24.6%) and sometimes

(23.2%). Exposure to telecom-operator TV advertising is also visible: 24.6% report seeing such advertising two to three times per day, while 20.3% report seeing it less than once per week.

Table 17: Mobile operators used by respondents

Operator category	Frequency (N)	Percentage of sample (%)
Ooredoo only	64	46.4%
Ooredoo with another operator	30	21.7%
Mobilis only	21	15.2%
Djezzy only	13	9.4%
Other / combined answers without Ooredoo	10	7.2%
Total	138	100.0%

Source: Developed by the author based on SPSS descriptive output. Operator combinations were regrouped for readability.

Ooredoo is the most represented operator in the cleaned database. The single-operator answer “Ooredoo only” represents 46.4% of valid responses, while “Ooredoo with another operator” represents 21.7%. Taken together, responses including Ooredoo account for 68.1% of the sample. Mobilis only represents 15.2%, Djezzy only 9.4%, and other or combined answers without Ooredoo represent 7.2%. This is useful for the study because perceived Share of Voice is comparative by nature, and respondents are able to evaluate Ooredoo in relation to other mobile operators.

1.4 Descriptive Analysis of the Study Variables Based on SPSS Outputs

After presenting the respondent profile and exposure characteristics, the analysis now moves to the study variables. The descriptive analysis of the Likert-scale items is based on the SPSS means reported from the cleaned database previously described in the data screening section. These means provide an initial reading of respondents’ perceptions of Ooredoo’s television

Share of Voice, Brand Awareness, Brand Image, Perceived Quality, and Brand Preference before the SmartPLS hypothesis testing.

Table 18: Construct-level descriptive statistics

Construct	Average mean	Number of items	Initial valid N range	Admission level	Comment
Share of Voice (SOV)	3.35	4	134-136	Medium	Moderate visibility
Brand Awareness (BA)	4.02	3	133-134	High	Strong recognition
Brand Image (BI)	3.55	5	132-135	High	Favorable image
Perceived Quality (PQ)	3.39	4	133-135	Medium	Cautious quality view
Brand Preference (BP)	3.31	3	131-134	Medium	Moderate preference

Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

At the construct level, Brand Awareness records the highest average mean ($M = 4.02$), which indicates a strong level of recognition and recall of Ooredoo. Brand Image is also evaluated positively ($M = 3.55$). By contrast, Share of Voice ($M = 3.35$), Perceived Quality ($M = 3.39$), and Brand Preference ($M = 3.31$) remain at a medium-to-positive level. The initial valid N ranges shown in the table indicate the number of originally observed answers before mean substitution; after treatment, the cleaned item columns were retained for the analyses. This hierarchy suggests that Ooredoo's television visibility is especially reflected in awareness and image, whereas quality judgments and preference require stronger support from actual service experience and offer attractiveness.

Table 19: Item-level descriptive statistics for Share of Voice (SOV)

Code	Item meaning	Initial valid N	Mean	Admission level
SOV1	Ooredoo is more present on TV than competitors	136	3.56	High
SOV2	Ooredoo advertisements are frequently repeated	135	3.68	High
SOV3	Ooredoo advertisements seem longer than competitors' ads	135	3.13	Medium
SOV4	Ooredoo TV advertisements influence respondents' perception of the brand	134	3.04	Medium

Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

The SOV items show that respondents mainly perceive Ooredoo through repetition and relative presence on television. SOV2 records the highest SOV score ($M = 3.68$), followed by SOV1 ($M = 3.56$). However, SOV3 ($M = 3.13$) and SOV4 ($M = 3.04$) remain more moderate, indicating that the perceived length of advertisements and their direct influence on brand perception are less strongly evaluated.

Table 20: Item-level descriptive statistics for Brand Awareness (BA)

Code	Item meaning	Initial valid N	Mean	Admission level
BA1	Ooredoo comes to mind among telecom operators	133	3.80	High
BA2	Respondent can easily recognize Ooredoo advertisements	134	4.13	High
BA3	Respondent can distinguish Ooredoo from other operators	133	4.14	High

Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

Brand Awareness items show the strongest descriptive results among the descriptive variables. BA2 (M = 4.13) and BA3 (M = 4.14) indicate that respondents can easily recognize Ooredoo advertisements and distinguish the brand from other operators. BA1 (M = 3.80) is also high, confirming that Ooredoo comes to mind among telecom operators. These results suggest that television visibility is particularly effective in reinforcing recognition and brand salience.

Table 21: Item-level descriptive statistics for Brand Image (BI)

Code	Item meaning	Initial valid N	Mean	Admission level
BI1	Ooredoo appears as a trustworthy brand	135	3.50	High
BI2	Ooredoo appears as an innovative brand	132	3.58	High
BI3	Ooredoo advertising gives a positive brand image	135	3.74	High
BI4	Ooredoo advertising creates a favorable impression	134	3.69	High
BI5	Ooredoo advertising encourages identification with the brand	133	3.24	Medium

Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

The Brand Image results are generally positive. BI3 records the highest mean ($M = 3.74$), followed by BI4 ($M = 3.69$), showing that Ooredoo's advertising contributes to a positive image and favorable impression of the brand. BI1 ($M = 3.50$) and BI2 ($M = 3.58$) also indicate that respondents tend to perceive Ooredoo as trustworthy and innovative. BI5 remains more moderate ($M = 3.24$), suggesting that identification with the brand is present but less strongly developed than general image evaluation.

Table 22: Item-level descriptive statistics for Perceived Quality (PQ)

Code	Item meaning	Initial valid N	Mean	Admission level
PQ1	Ooredoo provides high-quality services	135	3.47	High
PQ2	Advertising gives confidence in service quality	134	3.37	Medium
PQ3	Ooredoo offers good value for money	133	3.31	Medium
PQ4	Overall, Ooredoo meets respondents expectations	133	3.41	Medium

Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

The Perceived Quality items are evaluated at a medium-to-positive level. PQ1 has the highest mean ($M = 3.47$), indicating that respondents generally associate Ooredoo with service quality. PQ2 ($M = 3.37$), PQ3 ($M = 3.31$), and PQ4 ($M = 3.41$) remain moderate, which means that advertising can support perceived quality but must be reinforced by concrete service performance, value for money, and consumer experience.

Table 23: Item-level descriptive statistics for Brand Preference (BP)

Code	Item meaning	Initial valid N	Mean	Admission level
BP1	If choosing an operator today, respondent would choose Ooredoo	131	3.42	Medium
BP2	Respondent would recommend Ooredoo to others	133	3.46	High
BP3	Ooredoo TV advertising influences the choice to remain with the operator	134	3.05	Medium

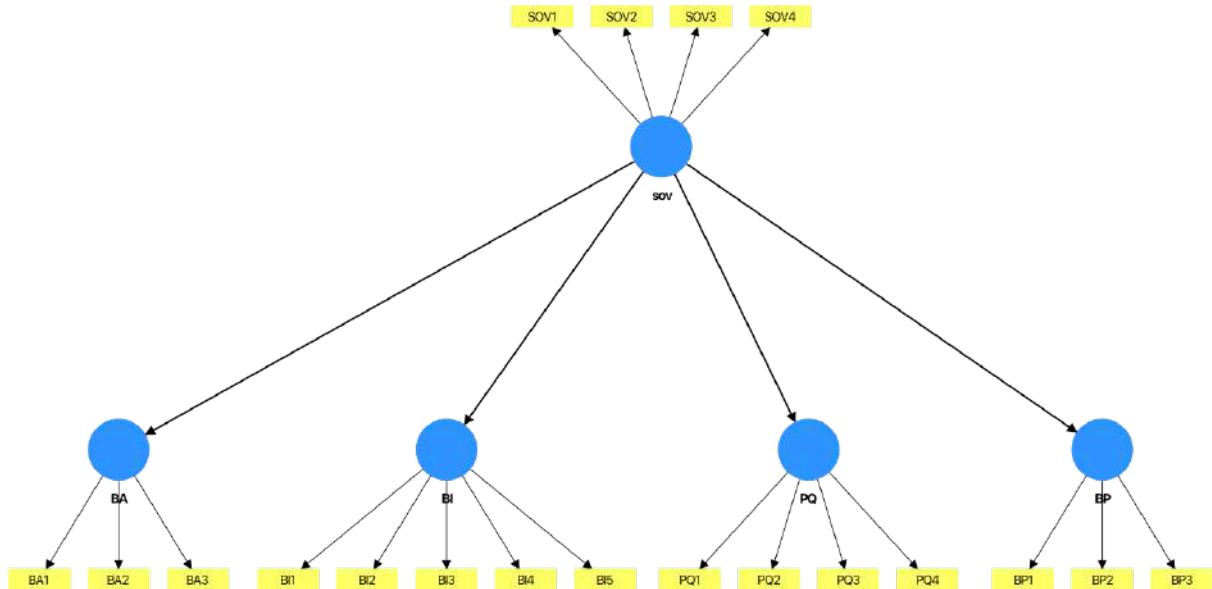
Source: Developed by the author based on SPSS descriptive output and the data-cleaning procedure.

The Brand Preference results are also moderate-to-positive. BP2 records the highest mean ($M = 3.46$), showing that respondents are relatively willing to recommend Ooredoo to others. BP1 ($M = 3.42$) indicates a moderate intention to choose Ooredoo if selecting an operator today. BP3 is the lowest item ($M = 3.05$), suggesting that television advertising alone has a limited direct influence on the decision to remain with the operator.

1.5 Measurement and Structural Model Assessment with SmartPLS

Before presenting the measurement and structural model results, the conceptual model tested in SmartPLS is presented below. The model considers television Share of Voice as the exogenous construct and examines its direct effects on Brand Awareness, Brand Image, Perceived Quality, and Brand Preference.

Figure 16: Conceptual model issued from SmartPLS



Source: Developed by the author based on Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

1.5.1 Evaluation of the Measurement Model

The measurement model was assessed using SmartPLS 4. The objective is to verify whether the indicators reliably measure their respective latent constructs before interpreting the structural relationships. The evaluation focuses on outer loadings, internal consistency reliability, convergent validity, and discriminant validity.

Table 24: Outer loadings of measurement indicators

Construct	Item	Outer loading	Assessment
Brand Awareness	BA1	0.690	Acceptable in exploratory research
Brand Awareness	BA2	0.902	Strong
Brand Awareness	BA3	0.894	Strong
Brand Image	BI1	0.751	Strong
Brand Image	BI2	0.853	Strong
Brand Image	BI3	0.863	Strong
Brand Image	BI4	0.859	Strong
Brand Image	BI5	0.807	Strong
Brand Preference	BP1	0.883	Strong
Brand Preference	BP2	0.908	Strong
Brand Preference	BP3	0.845	Strong
Perceived Quality	PQ1	0.876	Strong
Perceived Quality	PQ2	0.755	Strong
Perceived Quality	PQ3	0.860	Strong
Perceived Quality	PQ4	0.886	Strong
Share of Voice	SOV1	0.733	Strong
Share of Voice	SOV2	0.723	Strong
Share of Voice	SOV3	0.694	Acceptable in exploratory research
Share of Voice	SOV4	0.690	Acceptable in exploratory research

Source: Output from Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

Most indicators exceed the commonly recommended value of 0.70. Three indicators are slightly below this threshold (BA1, SOV3, and SOV4), but their values are close to 0.70 and are retained because they are theoretically relevant and acceptable in exploratory research. The measurement model is therefore considered adequate for further analysis.

Table 25: Construct reliability and convergent validity

Construct	Cronbach's Alpha	rho_A	Composite Reliability	AVE
Brand Awareness (BA)	0.775	0.808	0.871	0.696
Brand Image (BI)	0.884	0.891	0.916	0.685
Brand Preference (BP)	0.853	0.854	0.911	0.773
Perceived Quality (PQ)	0.866	0.868	0.909	0.715
Share of Voice (SOV)	0.684	0.682	0.803	0.504

Source: Output from Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

The reliability and validity indicators are globally satisfactory. Composite Reliability values are all above 0.80, indicating good internal consistency. AVE values are above the recommended threshold of 0.50 for all constructs, confirming convergent validity. Cronbach's Alpha for SOV is slightly below 0.70, but its Composite Reliability and AVE remain acceptable, which supports retaining the construct in the final model.

Table 26: HTMT matrix

Construct	BA	BI	BP	PQ	SOV
BA	-				
BI	0.681	-			
BP	0.540	0.831	-		
PQ	0.474	0.806	0.929	-	
SOV	0.612	0.596	0.517	0.558	-

Source: Output from Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

Overall, the HTMT results should be interpreted with caution: most values are below the conservative threshold of 0.90, which supports discriminant validity. Henseler et al. (2015) propose the HTMT criterion as a more reliable method for assessing discriminant validity in variance-based structural equation modeling, while Hair et al. (2017) indicate that HTMT values below the recommended threshold generally suggest that constructs are sufficiently distinct. However, the value between Perceived Quality and Brand Preference is 0.929, indicating strong conceptual proximity between these two constructs. This result is theoretically understandable in the telecommunications context because consumers who perceive an operator as offering good

service quality may also be more likely to prefer it. Nevertheless, this result requires cautious interpretation of the distinction between these two dimensions.

1.5.2 Evaluation of the Structural Model and Hypotheses Testing

After validating the measurement model, the structural model was examined to test the main hypothesis and the four sub-hypotheses. According to Hair et al. (2017), the evaluation of the structural model in PLS-SEM is based on several criteria, including path coefficients, t-values, p-values, coefficient of determination (R^2), and effect size (f^2). These indicators make it possible to assess both the significance and the explanatory power of the relationships between constructs. In this study, this stage determines whether television Share of Voice has a positive and significant effect on each dimension of consumer-based brand perception.

Table 27: Model fit indicators reported by SmartPLS

Indicator	Saturated model	Estimated model
SRMR	0.097	0.222
d ULS	1.804	9.344
d G	0.570	0.951
Chi-square	445.433	622.217
NFI	0.741	0.639

Source: Output from Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

The model fit indicators are reported for transparency. In PLS-SEM, these indicators are interpreted with caution because the method is primarily prediction-oriented rather than covariance-fit-oriented. Therefore, the interpretation of the results focuses mainly on the significance, size, and explanatory power of the structural paths.

Table 28: Path coefficients and hypotheses testing

Hypothesis	Relationship	Beta	T-value	p-value	Decision
H1a	SOV -> Brand Awareness (BA)	0.448	5.278	< 0.001	Supported
H1b	SOV -> Brand Image (BI)	0.506	5.747	< 0.001	Supported
H1c	SOV -> Perceived Quality (PQ)	0.467	6.076	< 0.001	Supported
H1d	SOV -> Brand Preference (BP)	0.438	6.075	< 0.001	Supported

Source: bootstrapping output from Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

All four sub-hypotheses are supported. The effect of television Share of Voice on Brand Image is the strongest (beta = 0.506), followed by Perceived Quality (beta = 0.467), Brand Awareness (beta = 0.448), and Brand Preference (beta = 0.438). All relationships are statistically significant at $p < 0.001$. These results confirm that perceived television visibility has a positive and significant impact on all four dimensions of Ooredoo's consumer-based brand perception.

Table 29: Explanatory power and effect size

Target construct	R ²	Adjusted R ²	f ²	Interpretation
Brand Awareness (BA)	0.201	0.195	0.251	Medium
Brand Image (BI)	0.256	0.251	0.344	Medium to strong
Perceived Quality (PQ)	0.218	0.212	0.279	Medium
Brand Preference (BP)	0.192	0.186	0.237	Medium

Source: Output Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4." Bönningstedt: SmartPLS, <https://www.smartpls.com>.

The model explains 25.6% of Brand Image, 21.8% of Perceived Quality, 20.1% of Brand Awareness, and 19.2% of Brand Preference. These values are meaningful because the model includes only one explanatory variable: perceived television Share of Voice. The strongest

explanatory result concerns Brand Image, which indicates that television visibility mainly contributes to building associations and impressions in consumer's minds.

Table 30: Synthesis of main and sub-hypotheses testing

Hypothesis	Relationship / statement	Decision
H0	TV SOV -> Consumer-based brand perception: no significant effect	Rejected
H1	TV SOV -> Consumer-based brand perception: positive and significant effect	Supported globally
H1a	TV SOV -> Brand Awareness (BA): positive and significant effect	Supported
H1b	TV SOV -> Brand Image (BI): positive and significant effect	Supported
H1c	TV SOV -> Perceived Quality (PQ): positive and significant effect	Supported
H1d	TV SOV -> Brand Preference (BP): positive and significant effect	Supported

Source: Developed by the author from Ringle, C. M., Wende, S., and Becker, J.-M. 2024. "SmartPLS 4."

Böningstedt: SmartPLS, <https://www.smartpls.com>.

The rejection of H0 means that the null assumption of no effect is not retained. The main hypothesis H1 is supported through the four significant paths from TV SOV to Brand Awareness, Brand Image, Perceived Quality, and Brand Preference. Therefore, television Share of Voice contributes positively to consumer-based brand perception of Ooredoo Algeria.

Section 2: Discussion of Results

In this section, the empirical results are interpreted by crossing the findings of the study with the theoretical and empirical contributions presented in the literature review. The objective is to determine whether the hypotheses formulated in this research are confirmed or nuanced, while

taking into account the specific context of the Algerian telecommunications market, where Ooredoo competes with Mobilis and Djezzy in a saturated and highly visible media environment.

2.1 The Influence of Television Share of Voice on Brand Awareness and Brand Image

The literature largely emphasizes the role of advertising exposure in strengthening consumers' awareness of a brand. Lavidge and Steiner (1961) consider awareness as one of the first stages of advertising effectiveness, while Zajonc (1968) explains that repeated exposure can increase familiarity and contribute to more favorable attitudes. In the same perspective, Sharp (2010) highlights the importance of mental availability, arguing that brands must be easily noticed and remembered in buying situations.

The results of this study confirm these theoretical contributions. The sub-hypothesis H1a, which stated that television media Share of Voice has a positive and significant effect on Brand Awareness among Ooredoo consumers, was validated. The relationship between television Share of Voice and Brand Awareness was positive and statistically significant ($\beta = 0.448$; $p < 0.001$). This means that the more respondents perceived Ooredoo as visible on television, the more they tended to recognize and remember the brand.

This result can be explained by the role of television as a mass medium. In a telecommunications market where consumers are regularly exposed to advertising from several operators, repeated television visibility helps maintain the brand in consumers' minds. Therefore, Ooredoo's television presence appears to contribute to reinforcing brand recall and recognition, especially in a market where the main operators offer services that are often perceived as relatively similar.

The results also confirmed the sub-hypothesis H1b, which stated that television media Share of Voice has a positive and significant effect on the Brand Image of Ooredoo. This relationship was the strongest among the four tested paths ($\beta = 0.506$; $p < 0.001$). This indicates that television visibility does not only help consumers remember Ooredoo, but also contributes to shaping the associations they attach to the brand.

This finding is consistent with Keller (1993), who defines brand image as the set of associations held in consumer memory, and with Aaker (1991), who considers brand associations as an

important dimension of brand equity. It also aligns with Rabab'ah et al. (2020), who showed that Algerian telecommunication television commercials use persuasive appeals such as celebrity endorsement, emotional messages, music, social belonging, and national identity. These elements can contribute to building symbolic and emotional meanings around the brand.

In the case of Ooredoo, this may explain why Brand Image was the most strongly affected dimension. Television advertising does not only create exposure; it also gives the brand a personality, a tone, and a set of associations. However, this result should still be interpreted from the consumer's perspective. Aitken et al. (2008) argue that consumers are not passive receivers of advertising messages, but actively interpret them according to their expectations, experiences, and social context. Thus, Ooredoo's television Share of Voice creates visibility, but its effect on brand image depends on how consumers receive and interpret the advertising content.

2.2 The Influence of Television Share of Voice on Perceived Quality and Brand Preference

The third tested relationship concerned the effect of television media Share of Voice on Perceived Quality. According to Aaker (1991), perceived quality refers to the consumer's subjective judgment of a brand's overall excellence or superiority. In the telecommunications sector, this perception may concern network coverage, internet speed, reliability, customer service, and the general credibility of the operator.

The results confirmed the sub-hypothesis H1c, which stated that television media Share of Voice has a positive and significant effect on consumers' perceived service quality of Ooredoo. The relationship was positive and statistically significant ($\beta = 0.467$; $p < 0.001$). This means that respondents who perceived Ooredoo as more visible on television were also more likely to associate the brand with higher service quality.

This finding can be understood through the signaling role of advertising. A strong television presence may give the impression that the brand is active, professional, financially solid, and confident in its offers. In other words, visibility can indirectly act as a signal of credibility. However, this result must be interpreted carefully. In telecommunications, perceived quality is not created by advertising alone. Benatia and Abid (2025) emphasize the role of customer experience and service quality in satisfaction and loyalty in the Algerian mobile telecommunications market. Similarly, Benachenhrou (2024) highlights the importance of perceived quality, trust, and loyalty in the Algerian telecommunications context.

Therefore, the validation of H1c shows that television visibility can support perceived quality, but it does not replace actual service performance. If consumers experience weak network coverage, poor customer service, or unsatisfactory prices, advertising visibility alone may not be sufficient to maintain a strong perception of quality.

The fourth sub-hypothesis H1d, which stated that television media Share of Voice has a positive and significant effect on consumer Brand Preference for Ooredoo, was also validated. The relationship was positive and statistically significant ($\beta = 0.438$; $p < 0.001$). This result indicates that Ooredoo's perceived visibility on television contributes to strengthening consumers' preference for the brand.

This finding is consistent with Zajonc's (1968) mere-exposure theory, which suggests that repeated exposure can increase familiarity and generate more favorable attitudes. It also aligns with Keller and Swaminathan (2020), who explain that strong brand equity leads to more favorable consumer responses. In this sense, television Share of Voice can help Ooredoo remain present in consumers' consideration set and increase the probability that the brand will be preferred over competitors.

Nevertheless, Brand Preference remains a more demanding dimension than Brand Awareness. A consumer may know and recognize Ooredoo without necessarily preferring it. Preference depends not only on media visibility, but also on previous experience, perceived quality, price, coverage, satisfaction, and trust. Therefore, although H1d was supported, the effect of television Share of Voice on preference should be understood as part of a broader decision-making process.

2.3 Contextual Interpretation of the Results

Overall, the results confirmed the main hypothesis H1, which stated that television media Share of Voice positively and significantly influences consumer-based brand perception of Ooredoo by strengthening Brand Awareness, Brand Image, Perceived Quality, and Brand Preference. All four sub-hypotheses were supported, with positive and significant effects at $p < 0.001$.

A notable result is that Brand Image recorded the strongest effect ($\beta = 0.506$), followed by Perceived Quality ($\beta = 0.467$), Brand Awareness ($\beta = 0.448$), and Brand Preference ($\beta = 0.438$). This suggests that Ooredoo's television visibility contributes most strongly to the symbolic and associative dimension of brand perception. In other words, television Share of Voice seems to be

particularly effective in shaping how consumers imagine and evaluate the brand, rather than only making it recognizable.

These results must be interpreted in light of the Algerian telecommunications context. The market is highly competitive and relatively saturated, with three main operators competing for visibility and consumer attention. In such a context, communication becomes an important tool of differentiation. Television remains relevant because it allows operators to reach a wide audience and reinforce their presence in consumers' minds.

However, as shown by Tabet Aoul (2020), Algerian consumers may also perceive television advertising as excessive when it becomes repetitive, long, or highly concentrated during specific periods such as Ramadan. Tabet Aoul and Benhabib (2018) also explain that advertising clutter can lead to consumer resistance. This means that a high television Share of Voice can be beneficial, but only if it is supported by relevant content, credible messages, and well-managed repetition.

Thus, the findings of this study highlight a balanced reality. On the one hand, television Share of Voice positively influences the four dimensions of consumer-based brand perception. On the other hand, its effectiveness depends on the quality of execution, consumer interpretation, and the broader advertising context. For Ooredoo, television visibility appears to be a useful brand-building tool, especially for reinforcing brand image, but it should be combined with coherent service performance and communication strategies that avoid excessive repetition.

Conclusion of Chapter III

This chapter presented the empirical results of the study on the impact of television Share of Voice on Ooredoo's consumer-based brand perception. The descriptive analysis was based on SPSS outputs, while the measurement model and structural model were assessed through SmartPLS 4.

The SmartPLS measurement model confirmed acceptable reliability and convergent validity. The structural model validated all four sub-hypotheses. Television Share of Voice has a positive and significant impact on Brand Awareness, Brand Image, Perceived Quality, and Brand Preference. The strongest effect concerns Brand Image, confirming that television visibility primarily contributes to building favorable associations and positive impressions in consumers' minds.

Overall, the findings show that television Share of Voice remains a relevant strategic lever for Ooredoo Algeria. However, visibility must be supported by credible service-quality messages and tangible consumer benefits if the brand wants to convert awareness and image into stronger preference.

GENERAL CONCLUSION

1. Research Synthesis

This dissertation aimed to analyze the extent to which television media Share of Voice influences consumer-based brand perception in the case of Ooredoo Algeria. The study was developed in response to a central research question: to what extent does Ooredoo's television visibility contribute to consumers' perceptions of the brand in a mature and highly competitive telecommunications market?

To answer this question, the research first established a theoretical framework around Share of Voice, television advertising, and consumer-based brand perception. It then connected this framework to the Algerian telecommunications context, where operators compete in a market characterized by high penetration, similar core offers, and strong dependence on communication as a source of differentiation.

2. Methodological Summary

The empirical part of the study followed a quantitative approach. Data were collected through an online questionnaire addressed to Algerian consumers exposed to television advertising by mobile operators. Before the statistical analyses, the database was screened and cleaned, and the limited missing Likert-scale answers were treated through mean substitution by replacing each blank response with the mean of its corresponding item/column.

SPSS outputs were used for the descriptive analysis of the respondent profile, television exposure, operator usage, and Likert-scale item means, while the same cleaned analytical dataset was imported into SmartPLS 4 for the PLS-SEM results.

3. Main Findings and Answer to the Research Problem

The results confirmed that television Share of Voice has a positive and statistically significant effect on the four dimensions examined in this research: Brand Awareness, Brand Image, Perceived Quality, and Brand Preference. Therefore, the four hypotheses formulated at the beginning of the study were supported.

The strongest relationship was observed between Share of Voice and Brand Image. This finding shows that Ooredoo's television visibility does not only help consumers recognize the brand; it mainly contributes to building favorable associations and positive impressions in their minds. Brand Awareness was also positively affected, confirming the role of television as a mass

medium capable of reinforcing recognition and recall. Perceived Quality was influenced as well, suggesting that repeated television presence can act as a signal of seriousness and market credibility. Finally, Brand Preference was positively affected, although it remained the weakest relationship, which indicates that preference is more demanding and depends not only on advertising exposure but also on service experience, price, coverage, and customer satisfaction.

In response to the main research problem, this dissertation concludes that television media Share of Voice does influence consumer-based brand perception of Ooredoo among Algerian consumers. However, its effect is not identical across all dimensions. Television visibility appears especially powerful for building image and awareness, while transforming this visibility into strong preference requires more concrete and credible consumer benefits.

4. Contributions of the Study

From a theoretical perspective, this research contributes to advertising and brand-perception literature by applying the concept of Share of Voice to a local Algerian telecommunications context. It also confirms the relevance of studying brand perception as a multidimensional construct rather than as a single global variable.

From a managerial perspective, the study provides practical insights for Ooredoo and for media-planning decision makers. The findings suggest that television remains a relevant brand-building medium, particularly when the objective is to strengthen brand image and maintain salience in a saturated market. Nevertheless, visibility should not be treated as an end in itself; it should be supported by consistent messages about service quality, network reliability, offers, and customer experience.

5. Limitations of the Research

Like any empirical research, this study includes some methodological limitations. First, the use of convenience sampling limits the generalization of the results to the entire Algerian population. The sample is more representative of accessible and connected respondents than of all telecommunications consumers in Algeria, particularly because the questionnaire was mainly distributed online.

Second, the sample size remains relatively limited. Although the final number of valid responses is sufficient for an exploratory quantitative study and an acceptable PLS-SEM model, it does not

allow the findings to be generalized with the same strength as a larger and more representative national sample. This limitation is mainly explained by the time constraints under which the study was conducted. Therefore, the results should be interpreted as exploratory evidence rather than definitive conclusions about the entire Algerian market.

Third, the empirical SOV variable is measured as perceived Share of Voice through the questionnaire, rather than through official media-monitoring data such as GRP, airtime, audience ratings, or advertising expenditure. Because specific media-buying data and internal GRP metrics are highly confidential and proprietary to telecom operators, this study does not estimate Ooredoo's exact objective media pressure. Instead, it evaluates how consumers perceive Ooredoo's television advertising visibility compared to competing operators. The results should therefore be interpreted strictly as the effect of perceived television visibility on brand perception.

Fourth, another methodological point concerns the conceptual proximity between some dimensions of consumer-based brand perception, specifically Perceived Quality and Brand Preference. In the Algerian telecommunications context, respondents may not always clearly separate their evaluation of service quality from their preference for the brand. This was evidenced by the high HTMT values reported during the discriminant-validity assessment.

Finally, the SPSS descriptive statistics and the SmartPLS results should be read as complementary. The descriptive part explains how respondents answered the questionnaire, while SmartPLS evaluates the measurement model and tests the structural relationships between perceived television Share of Voice and the four theoretical dimensions of consumer-based brand perception.

6. Managerial Recommendations

Based on these findings, several recommendations can be formulated. First, Ooredoo should maintain a coherent television presence, because visibility continues to play a strategic role in building brand awareness and brand image. Second, campaigns should combine emotional visibility with concrete messages about network quality, internet speed, customer service, digital services, and commercial offers. Third, television advertising should be integrated with other communication channels so that repeated visibility is transformed into consistent brand experience and stronger preference.

It is also recommended that future campaigns be evaluated not only through visibility indicators but also through perception-based indicators, such as brand associations, perceived quality, preference, and recommendation intention. This would allow the brand to assess whether media pressure is actually translated into stronger consumer-based brand equity.

7. Future Research Perspectives

Future research could extend this study in several ways. A first direction would be to combine perceived Share of Voice with objective media-monitoring indicators, such as GRP, airtime, advertising expenditure, and competitive SOV. A second direction would be to compare Ooredoo with Mobilis and Djezzy in order to understand whether the same relationships are observed across competing telecom brands.

Future studies could also adopt a mixed-method approach by combining quantitative modeling with qualitative interviews. This would make it possible to understand more deeply why television visibility strengthens image more strongly than preference and how Algerian consumers interpret emotional, rational, and credibility-based advertising messages.

8. Final Statement

Overall, this dissertation shows that television Share of Voice remains a relevant strategic lever for Ooredoo Algeria. Being visible on television contributes positively to brand awareness, brand image, perceived quality, and brand preference. Nevertheless, the results also show that visibility alone is not sufficient. To transform media presence into stronger preference and long-term loyalty, Ooredoo must connect its television visibility to credible service-quality promises, tangible consumer benefits, and a consistent brand experience.

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APPENDICES

Appendix A: SPSS OUTPUTS

Frequencies

		Statistics				
		2. Quel opérateur mobile utilisez-vous actuellement ?	1.1 À quelle fréquence regardez-vous la télévision ?	1.2 À quelle fréquence regardez-vous les publicités télévisées sans zapper ?	1.3 À quelle fréquence voyez-vous des publicités télévisées d'un opérateur mobile (Mobilis, Djezzy, Ooredoo) ? ?	7.1 Quelle est votre tranche d'âge ?
N	Valid	138	138	138	138	138
	Missing	0	0	0	0	0

		Statistics	
		7.2 Quel est votre sexe ?	7.3 Zone géographique de résidence
N	Valid	138	138
	Missing	0	0

Frequency Table

2. Quel opérateur mobile utilisez-vous actuellement ?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Autre	2	1.4	1.4	1.4
	Djezzy	13	9.4	9.4	10.9
	Djezzy, Autre	1	.7	.7	11.6
	Djezzy, Ooredoo	11	8.0	8.0	19.6
	Djezzy, Mobilis	1	.7	.7	20.3
	Djezzy, Ooredoo	1	.7	.7	21.0
	Mobilis	21	15.2	15.2	36.2
	Mobilis, Djezzy	6	4.3	4.3	40.6
	Mobilis, Ooredoo	17	12.3	12.3	52.9
	Ooredoo	64	46.4	46.4	99.3
	Ooredoo, Mobilis	1	.7	.7	100.0
	Total	138	100.0	100.0	

1.1 À quelle fréquence regardez-vous la télévision ?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Jamais	2	1.4	1.4	1.4
	Plusieurs fois par jour	21	15.2	15.2	16.7
	Plusieurs fois par mois	13	9.4	9.4	26.1
	Plusieurs fois par semaine	30	21.7	21.7	47.8
	Rarement (moins d'une fois par mois)	24	17.4	17.4	65.2
	Une fois par jour	37	26.8	26.8	92.0
	Une fois par semaine	11	8.0	8.0	100.0
	Total	138	100.0	100.0	

1.2 À quelle fréquence regardez-vous les publicités télévisées sans zapper ?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	.7	.7	.7
À chaque fois (100% du temps)	7	5.1	5.1	5.8
Jamais	2	1.4	1.4	7.2
Parfois (25-49% du temps)	32	23.2	23.2	30.4
Rarement (1-24% du temps)	34	24.6	24.6	55.1
Souvent (50-74% du temps)	40	29.0	29.0	84.1
Très souvent (75-99% du temps)	22	15.9	15.9	100.0
Total	138	100.0	100.0	

1.3 À quelle fréquence voyez-vous des publicités télévisées d'un opérateur mobile (Mobilis, Djezzy, Ooredoo) ? ?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	.7	.7	.7
1 fois par jour	14	10.1	10.1	10.9
1 fois par semaine	18	13.0	13.0	23.9
2 à 3 fois par jour	34	24.6	24.6	48.6
2 à 3 fois par semaine	14	10.1	10.1	58.7
4 à 6 fois par semaine	12	8.7	8.7	67.4
Moins d'une fois par semaine	28	20.3	20.3	87.7
Plus de 3 fois par jour	17	12.3	12.3	100.0
Total	138	100.0	100.0	

7.1 Quelle est votre tranche d'âge ?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	1.4	1.4	1.4
18-25 ans	73	52.9	52.9	54.3
26-35 ans	19	13.8	13.8	68.1
36-49 ans	19	13.8	13.8	81.9
50 ans et plus	19	13.8	13.8	95.7
Moins de 18 ans	6	4.3	4.3	100.0
Total	138	100.0	100.0	

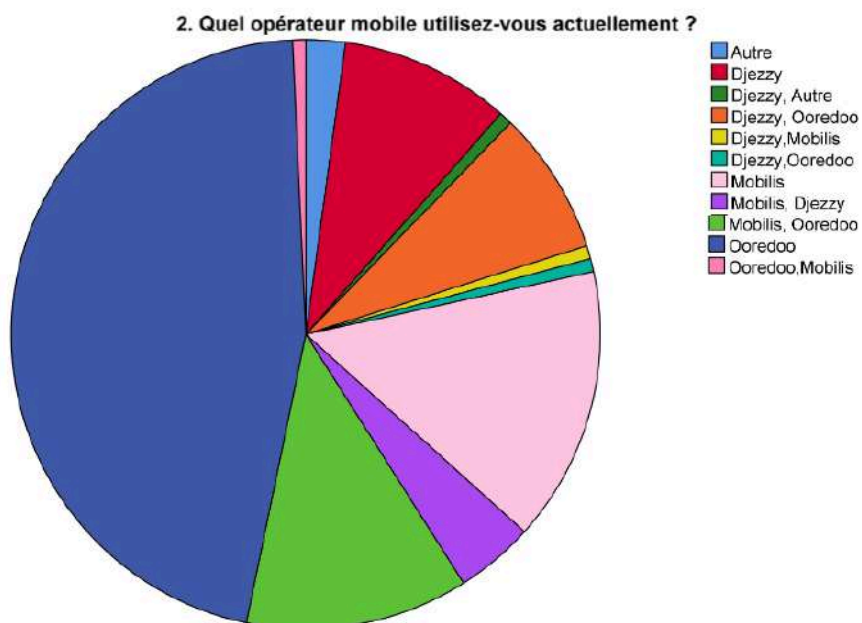
7.2 Quel est votre sexe ?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	1.4	1.4	1.4
Femme	83	60.1	60.1	61.6
Homme	53	38.4	38.4	100.0
Total	138	100.0	100.0	

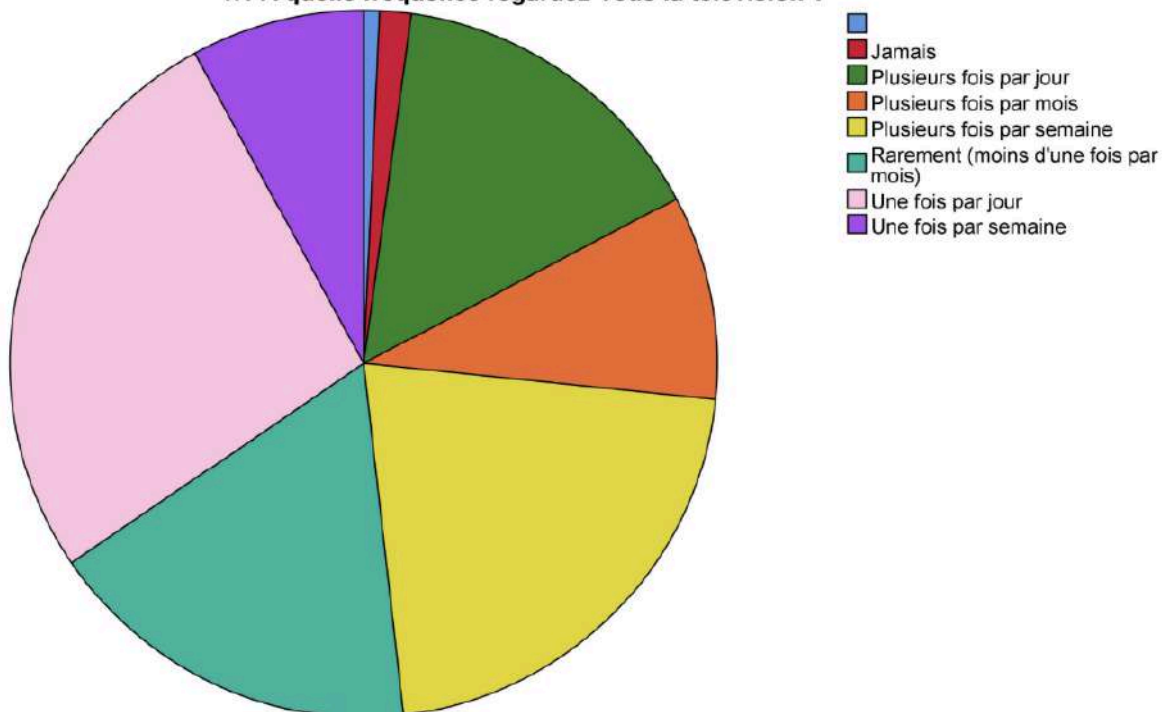
7.3 Zone géographique de résidence

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	5	3.6	3.6	3.6
Centre (Médéa, Aïn Defla, Chlef...)	6	4.3	4.3	8.0
Est (Constantine, Annaba, Sétif...)	14	10.1	10.1	18.1
Nord (Alger, Tipaza, Blida...)	99	71.7	71.7	89.9
Ouest (Oran, Tlemcen, Sidi Bel Abbès...)	9	6.5	6.5	96.4
Sud (Ouargla, Béchar, Adrar...)	5	3.6	3.6	100.0
Total	138	100.0	100.0	

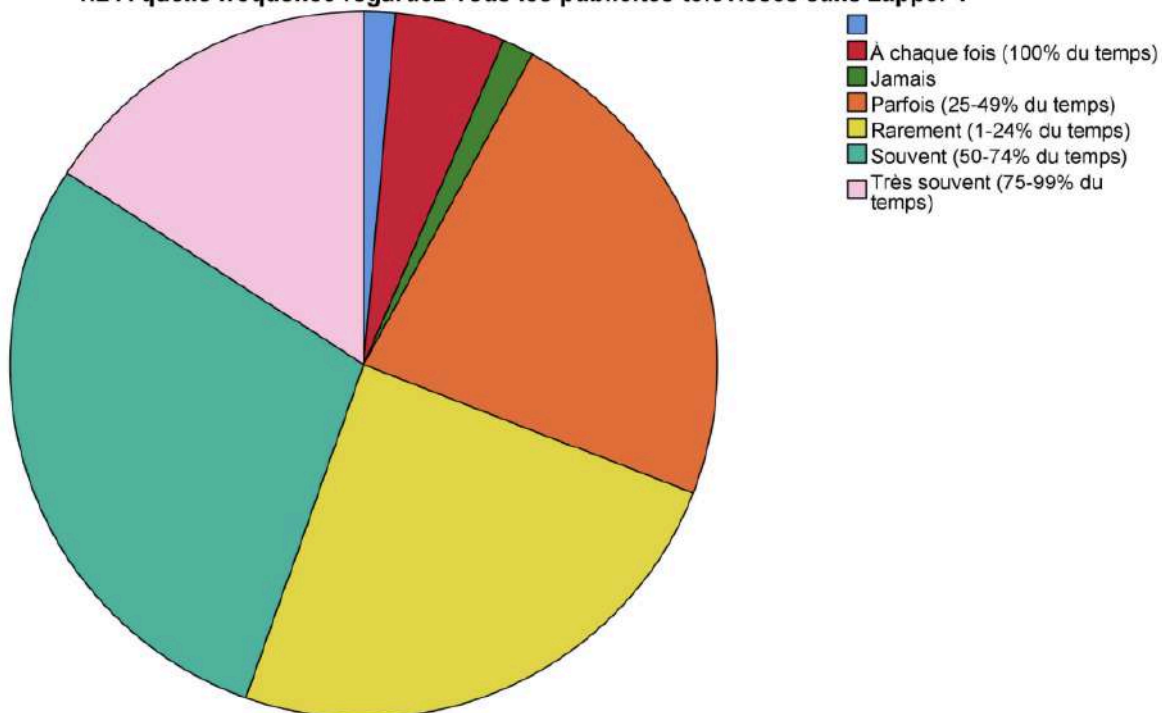
Pie Chart



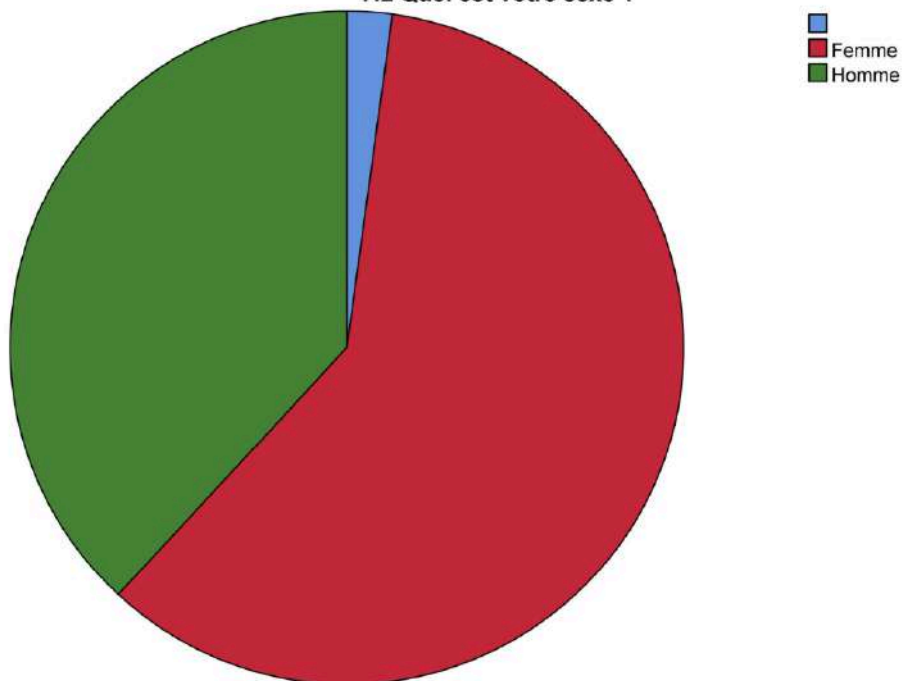
1.1 À quelle fréquence regardez-vous la télévision ?



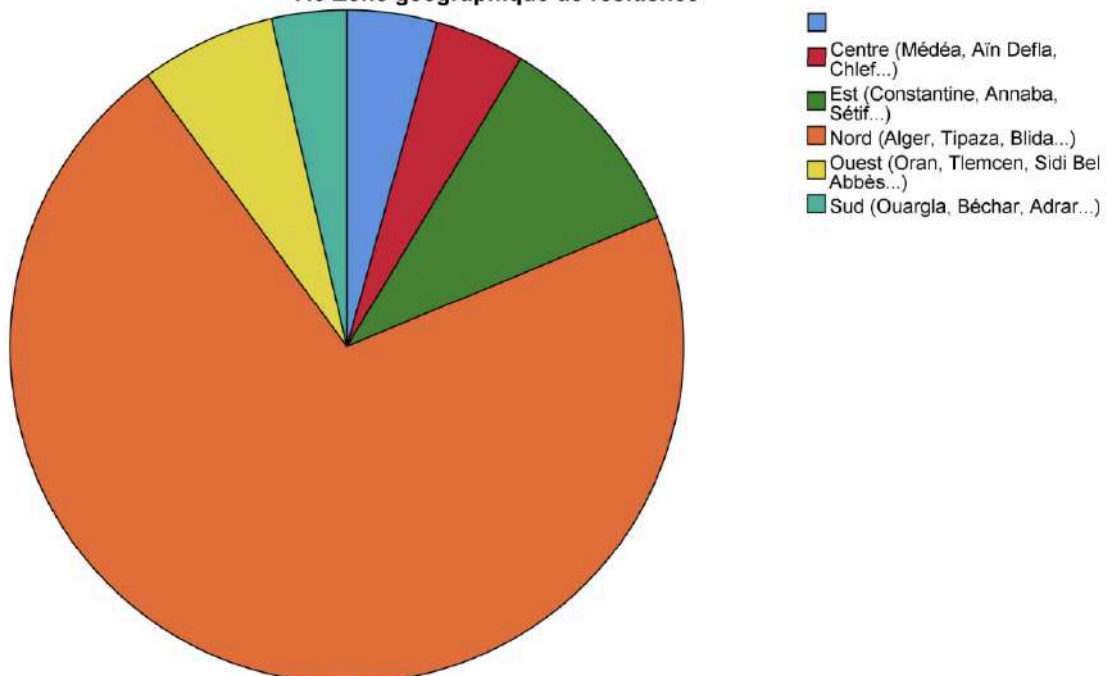
1.2 À quelle fréquence regardez-vous les publicités télévisées sans zapper ?



7.2 Quel est votre sexe ?



7.3 Zone géographique de résidence



Descriptives

Descriptive Statistics

	N	Mean
2.1 Comparé aux autres opérateurs, Ooredoo est plus présent à la télévision.	136	3.56
2.2 Les publicités d'Ooredoo sont fréquemment répétées.	135	3.68
2.3 Les publicités d'Ooredoo ont tendance à être plus longues que celles des autres opérateurs.	135	3.13
2.4 Les publicités télévisées d'Ooredoo ont influencé ma perception de la marque.	134	3.04
3.1 Ooredoo est l'une des premières marques qui me viennent à l'esprit quand je pense aux opérateurs mobiles.	133	3.80
3.2 Je peux facilement reconnaître les publicités d'Ooredoo.	134	4.13
3.3 Je peux facilement distinguer Ooredoo des autres opérateurs.	133	4.14

Descriptive Statistics

	N	Mean
4.1 Ooredoo me semble être une marque digne de confiance.	135	3.50
4.2 Ooredoo me semble être une marque innovante.	132	3.58
4.3 La publicité d'Ooredoo donne une image positive de la marque.	135	3.74
4.4 La publicité d'Ooredoo crée une impression favorable.	134	3.69
4.5 Les publicités d'Ooredoo me donnent envie de m'identifier à la marque.	133	3.24
5.1 Ooredoo fournit des services de haute qualité.	135	3.47
5.2 Les publicités d'Ooredoo me donnent confiance dans la qualité de ses services.	134	3.37
5.3 Ooredoo offre un bon rapport qualité-prix	133	3.31
5.4 Globalement, Ooredoo répond à mes attentes.	133	3.41
6.1 Si je devais choisir un opérateur aujourd'hui, je choisirais Ooredoo.	131	3.42
6.2 Je recommanderais Ooredoo à d'autres.	133	3.46
6.3 Les publicités télévisées d'Ooredoo influencent mon choix de rester avec cet opérateur.	134	3.05
Valid N (listwise)	125	

Appendix B: Smart-PLS Outputs

Outer loadings - Matrix

Outerloadings - Matrix						Copy to Excel/Word	Copy to R
	BA	BI	BP	PQ	SOV		
BA1	0.690						
BA2	0.902						
BA3	0.894						
BI1		0.751					
BI2		0.853					
BI3		0.863					
BI4		0.859					
BI5		0.807					
BP1			0.883				
BP2			0.908				
BP3			0.845				
PQ1				0.876			
PQ2				0.755			
PQ3				0.860			
PQ4				0.886			
SOV1					0.733		
SOV2					0.723		
SOV3					0.694		
SOV4					0.690		

Outer weights - Matrix

Outer weights - Matrix						
	BA	BI	BP	PQ	sov	
BA1	0.334					
BA2	0.468					
BA3	0.388					
BI1		0.206				
BI2		0.270				
BI3		0.234				
BI4		0.260				
BI5		0.235				
BP1			0.362			
BP2			0.371			
BP3			0.405			
PQ1				0.281		
PQ2				0.283		
PQ3				0.314		
PQ4				0.305		
SOV1					0.404	
SOV2					0.292	
SOV3					0.252	
SOV4					0.461	

Construct reliability and validity - Overview

Construct reliability and validity - Overview					
	Cronbach's alpha	Composite reliability (rho_a)	Composite reliability (rho_c)	Average variance extracted (AVE)	
BA	0.775	0.808	0.871	0.696	
BI	0.884	0.891	0.916	0.685	
BP	0.853	0.854	0.911	0.773	
PQ	0.866	0.868	0.909	0.715	
sov	0.684	0.682	0.803	0.504	

f-square - Matrix

f-square - Matrix

	BA	BI	BP	PQ	sov	
BA						
BI						
BP						
PQ						
sov	0.251	0.344	0.237	0.279		

R-square - Overview

R-square - Overview

	R-square	R-square adjusted	
BA	0.201	0.195	
BI	0.256	0.251	
BP	0.192	0.186	
PQ	0.218	0.212	

Collinearity statistics (VIF) - Outer model - List

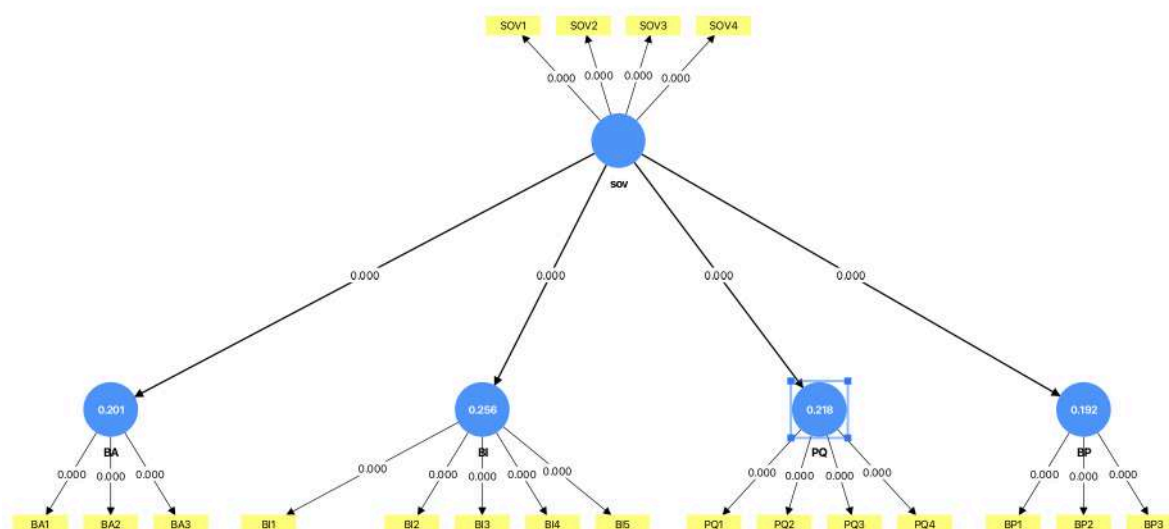
Collinearity statistics (VIF) - Outer model - List

	VIF	
BA1	1.246	
BA2	2.505	
BA3	2.583	
BI1	1.699	
BI2	2.258	
BI3	2.594	
BI4	2.486	
BI5	1.952	
BP1	2.622	
BP2	2.919	
BP3	1.698	
PQ1	2.519	
PQ2	1.625	
PQ3	2.547	
PQ4	2.738	
SOV1	1.393	
SOV2	1.577	
SOV3	1.428	
SOV4	1.142	

Average variance extracted (AVE) - Mean, STDEV, T values, p values

Average variance extracted (AVE) - Mean, STDEV, T values, p values						
	Original sample (O)	Sample mean (M)	Standard deviation (STDEV)	T statistics (O/STDEV)	P values	
BA	0.696	0.694	0.038	18.261	0.000	
BI	0.685	0.684	0.034	19.964	0.000	
BP	0.773	0.773	0.028	27.252	0.000	
PQ	0.715	0.715	0.034	21.062	0.000	
sov	0.504	0.498	0.051	9.939	0.000	

Smart-PLS Path Model(BOOT strapping)



Heterotrait-monotrait ratio (HTMT) - Confidence intervals

Heterotrait-monotrait ratio (HTMT) - Confidence intervals					
	Original sample (O)	Sample mean (M)	2.5%	97.5%	
BI <-> BA	0.681	0.681	0.535	0.806	
BP <-> BA	0.540	0.540	0.382	0.693	
BP <-> BI	0.831	0.831	0.738	0.912	
PQ <-> BA	0.474	0.476	0.311	0.637	
PQ <-> BI	0.806	0.806	0.700	0.894	
PQ <-> BP	0.929	0.931	0.861	0.994	
sov <-> BA	0.612	0.608	0.388	0.792	
sov <-> BI	0.596	0.601	0.364	0.811	
sov <-> BP	0.517	0.524	0.331	0.709	
sov <-> PQ	0.558	0.565	0.353	0.752	

Latent variable correlations - Mean, STDEV, T values, p values

Latent variable correlations - Mean, STDEV, T values, p values

	Original sample (O)	Sample mean (M)	Standard deviation (STDEV)	T statistics (O /STDEV)	P values	
BI <-> BA	0.548	0.545	0.072	7.589	0.000	
BP <-> BA	0.420	0.421	0.073	5.729	0.000	
BP <-> BI	0.718	0.718	0.049	14.808	0.000	
PQ <-> BA	0.377	0.379	0.073	5.180	0.000	
PQ <-> BI	0.700	0.700	0.053	13.173	0.000	
PQ <-> BP	0.800	0.801	0.032	24.790	0.000	
sov <-> BA	0.448	0.454	0.085	5.278	0.000	
sov <-> BI	0.506	0.520	0.088	5.747	0.000	
sov <-> BP	0.438	0.453	0.072	6.075	0.000	
sov <-> PQ	0.467	0.484	0.077	6.076	0.000	

Cronbach's alpha - Mean, STDEV, T values, p values

Cronbach's alpha - Mean, STDEV, T values, p values

	Original sample (O)	Sample mean (M)	Standard deviation (STDEV)	T statistics (O /STDEV)	P values	
BA	0.775	0.773	0.041	18.789	0.000	
BI	0.884	0.883	0.019	46.882	0.000	
BP	0.853	0.852	0.024	35.232	0.000	
PQ	0.866	0.865	0.023	36.991	0.000	
sov	0.684	0.678	0.051	13.334	0.000	

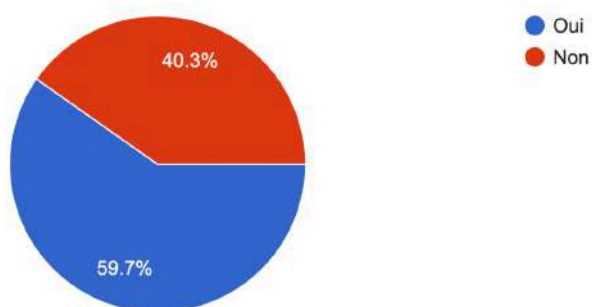
Outer Model Collinearity statistics (VIF)

Outer model collinearity statistics (VIF) - Confidence intervals				
	Original sample (O)	Sample mean (M)	2.5%	97.5%
BA1	1.246	1.281	1.110	1.545
BA2	2.505	2.632	1.818	3.889
BA3	2.583	2.714	1.871	4.001
BI1	1.699	1.807	1.383	2.407
BI2	2.258	2.399	1.780	3.257
BI3	2.594	2.774	1.982	3.969
BI4	2.486	2.621	1.891	3.659
BI5	1.952	2.043	1.632	2.580
BP1	2.622	2.697	2.064	3.599
BP2	2.919	3.012	2.269	4.026
BP3	1.698	1.746	1.373	2.248
PQ1	2.519	2.674	1.957	3.740
PQ2	1.625	1.710	1.299	2.347
PQ3	2.547	2.680	1.953	3.740
PQ4	2.738	2.885	2.147	3.896
SOV1	1.393	1.444	1.177	1.850
SOV2	1.577	1.626	1.312	2.056
SOV3	1.428	1.465	1.215	1.813
SOV4	1.142	1.172	1.052	1.353

Appendix C : Google Form Outputs

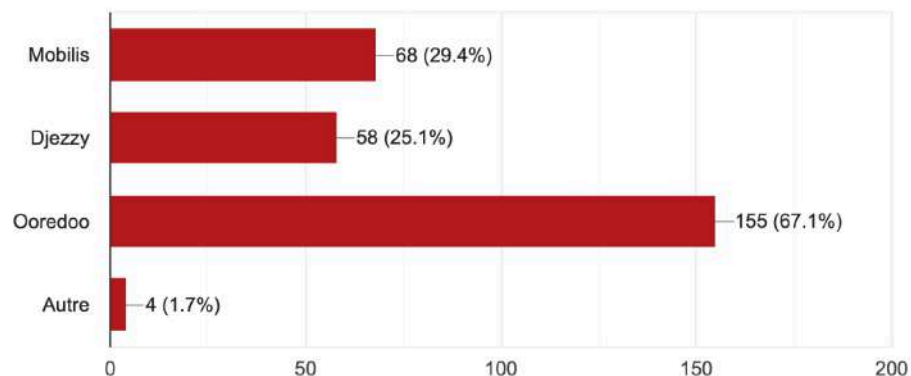
1. Regardez-vous la télévision ?

231 responses



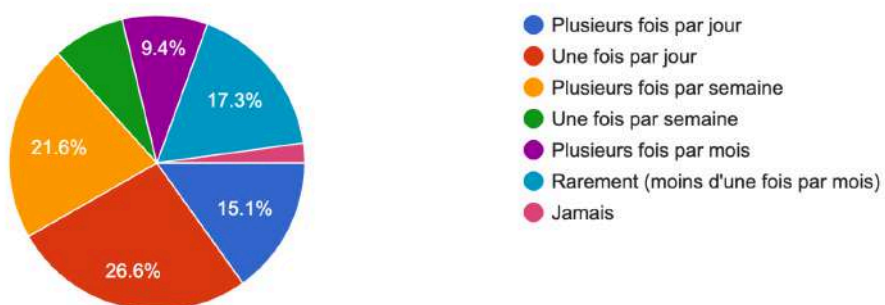
2. Quel opérateur mobile utilisez-vous actuellement ?

231 responses



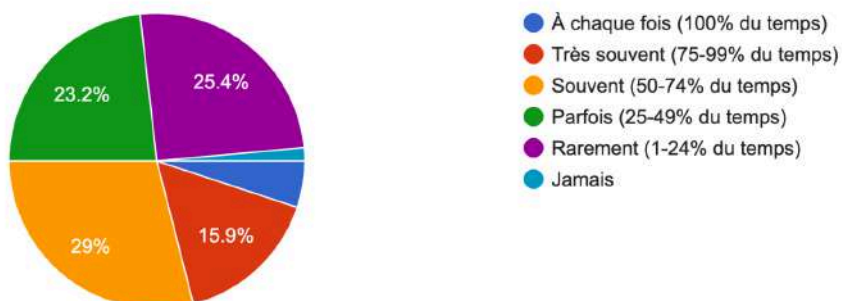
1.1 À quelle fréquence regardez-vous la télévision ?

139 responses



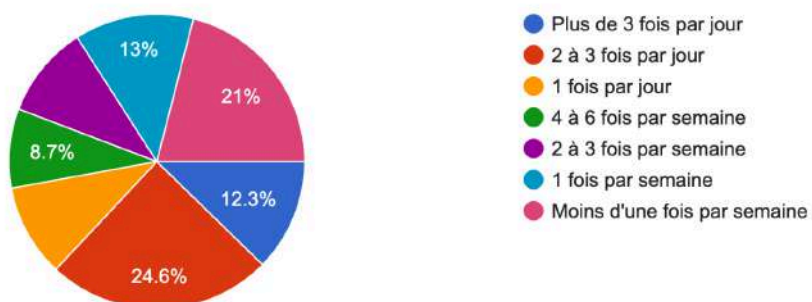
1.2 À quelle fréquence regardez-vous les publicités télévisées sans zapper ?

138 responses



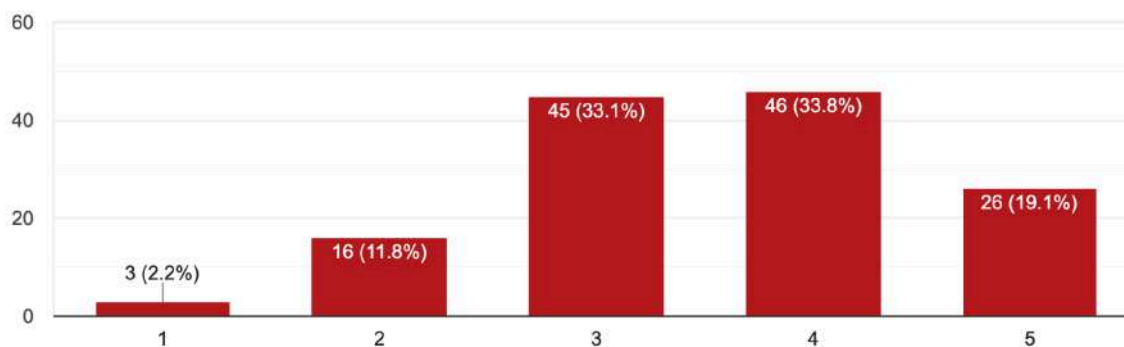
1.3 À quelle fréquence voyez-vous des publicités télévisées d'un opérateur mobile (Mobilis, Djezzy, Ooredoo) ? ?

138 responses



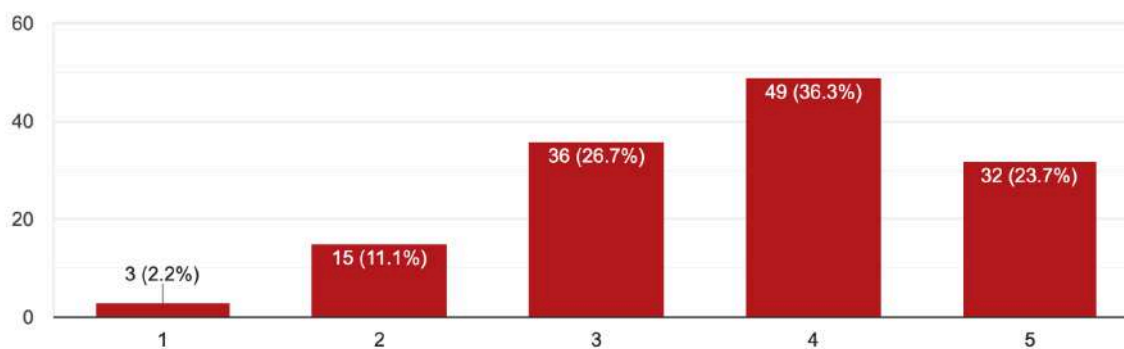
2.1 Comparé aux autres opérateurs, Ooredoo est plus présent à la télévision.

136 responses



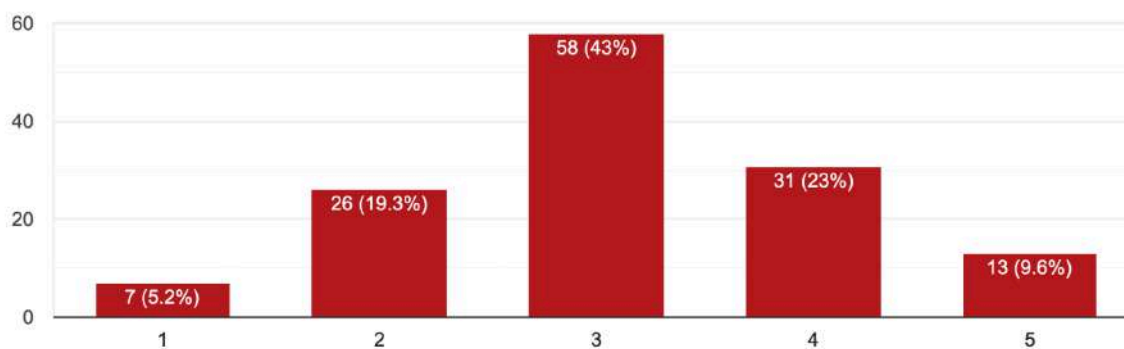
2.2 Les publicités d'Ooredoo sont fréquemment répétées.

135 responses



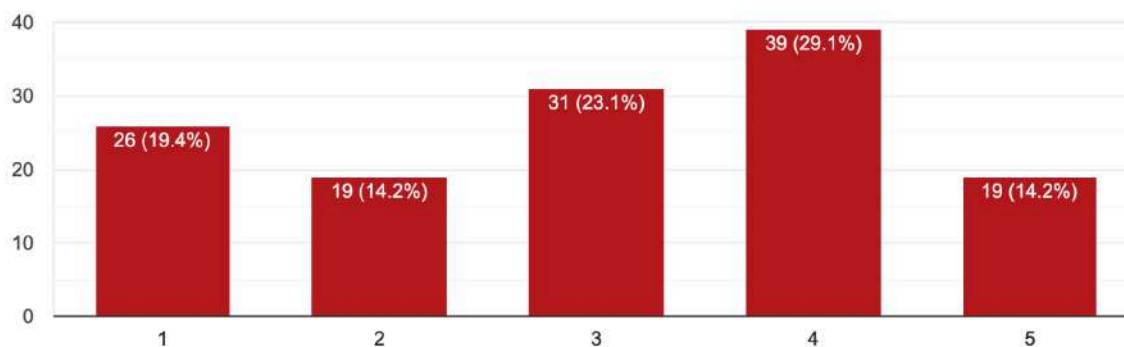
2.3 Les publicités d'Ooredoo ont tendance à être plus longues que celles des autres opérateurs.

135 responses



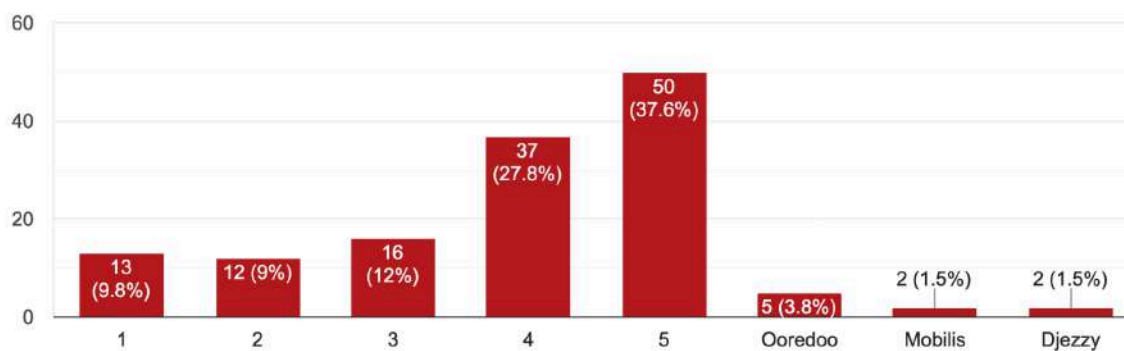
2.4 Les publicités télévisées d'Ooredoo ont influencé ma perception de la marque.

134 réponses



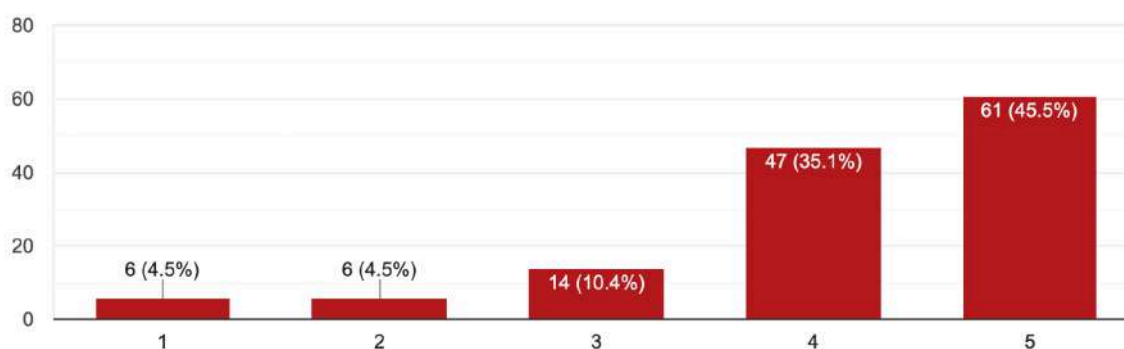
3.1 Ooredoo est l'une des premières marques qui me viennent à l'esprit quand je pense aux opérateurs mobiles.

133 réponses



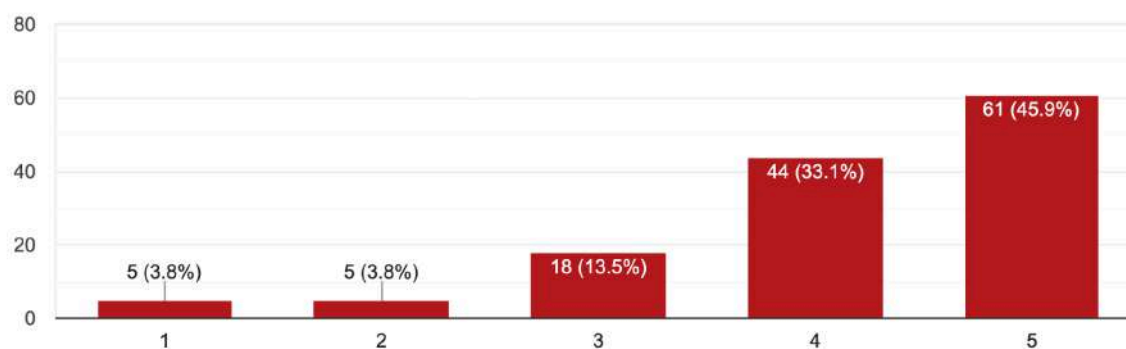
3.2 Je peux facilement reconnaître les publicités d'Ooredoo.

134 réponses



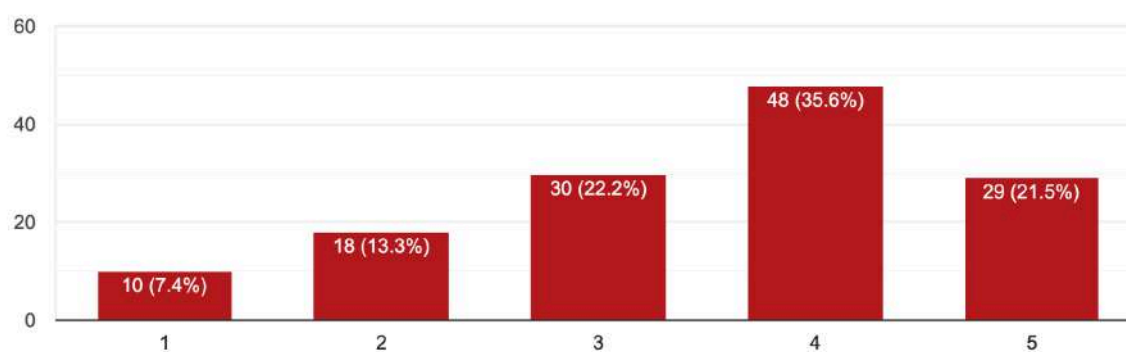
3.3 Je peux facilement distinguer Ooredoo des autres opérateurs.

133 responses



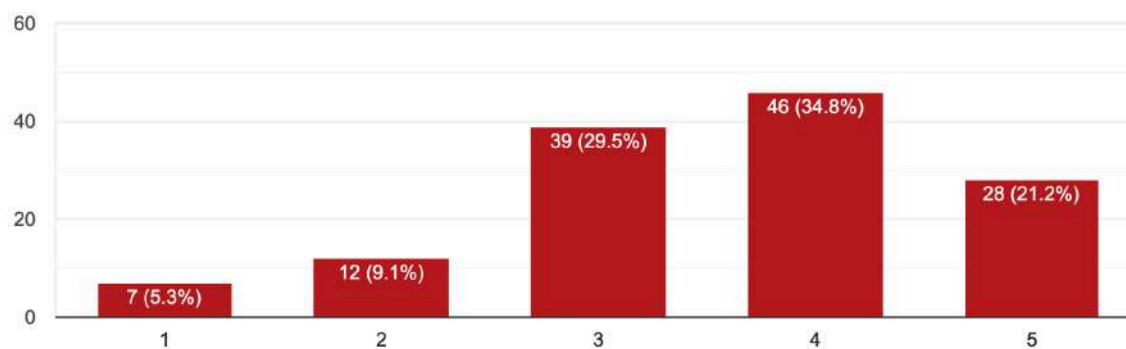
4.1 Ooredoo me semble être une marque digne de confiance.

135 responses



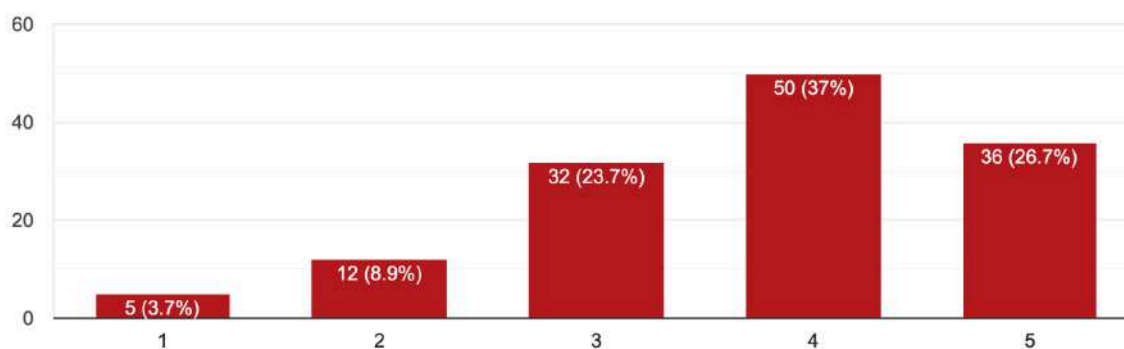
4.2 Ooredoo me semble être une marque innovante.

132 responses



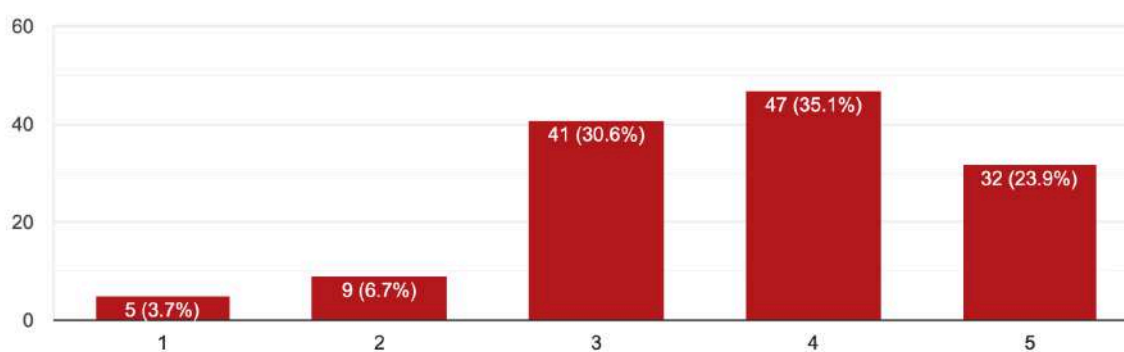
4.3 La publicité d'Ooredoo donne une image positive de la marque.

135 responses



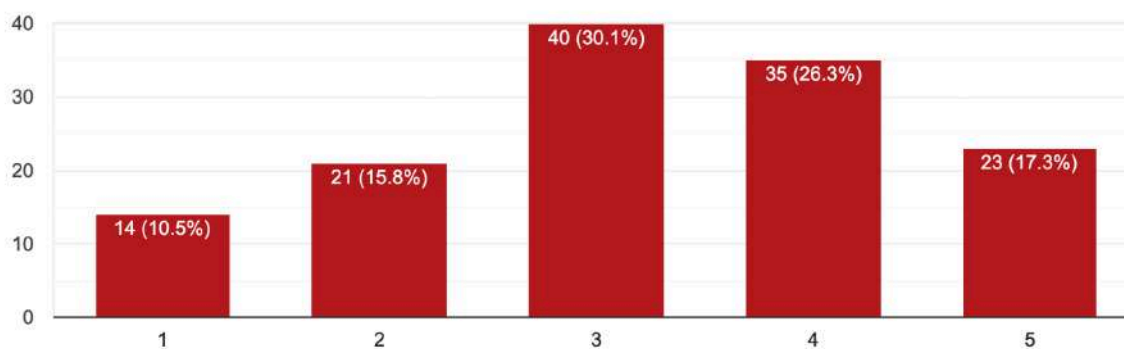
4.4 La publicité d'Ooredoo crée une impression favorable.

134 responses



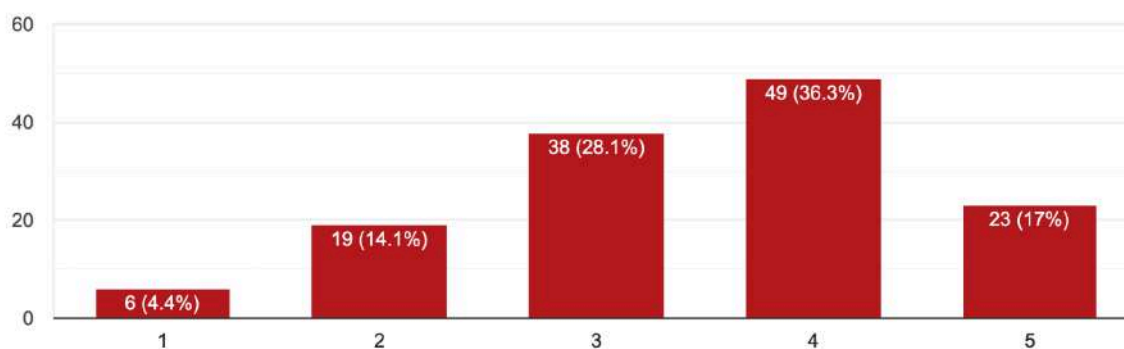
4.5 Les publicités d'Ooredoo me donnent envie de m'identifier à la marque.

133 responses



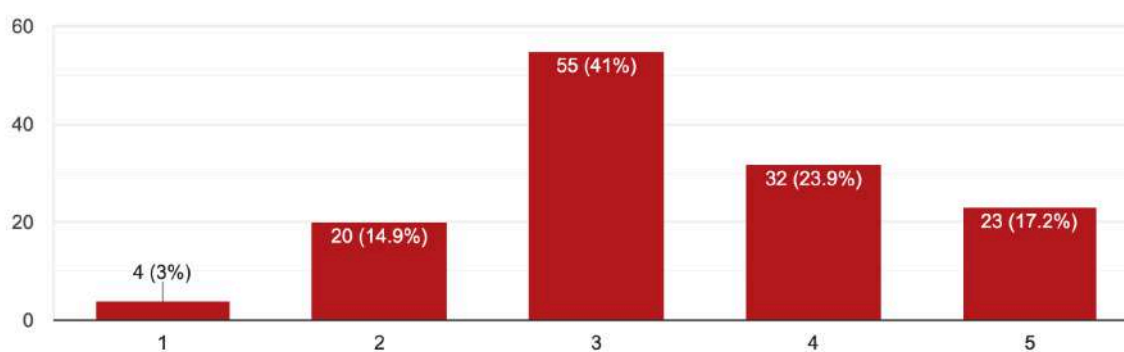
5.1 Ooredoo fournit des services de haute qualité.

135 responses



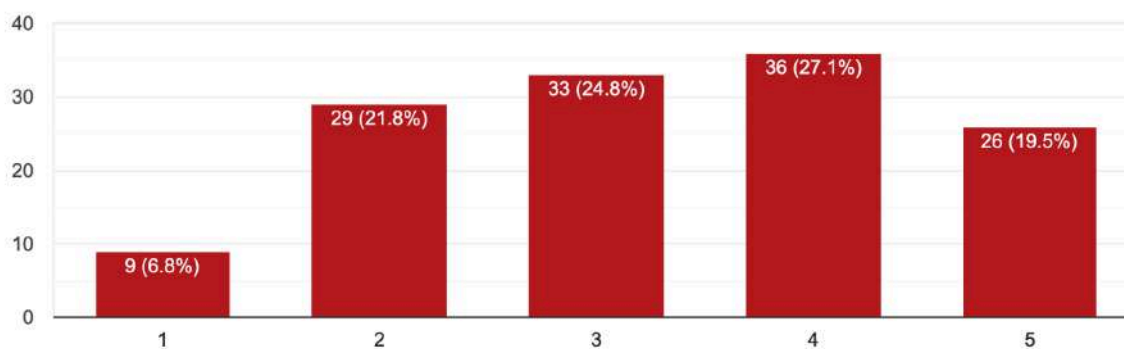
5.2 Les publicités d'Ooredoo me donnent confiance dans la qualité de ses services.

134 responses



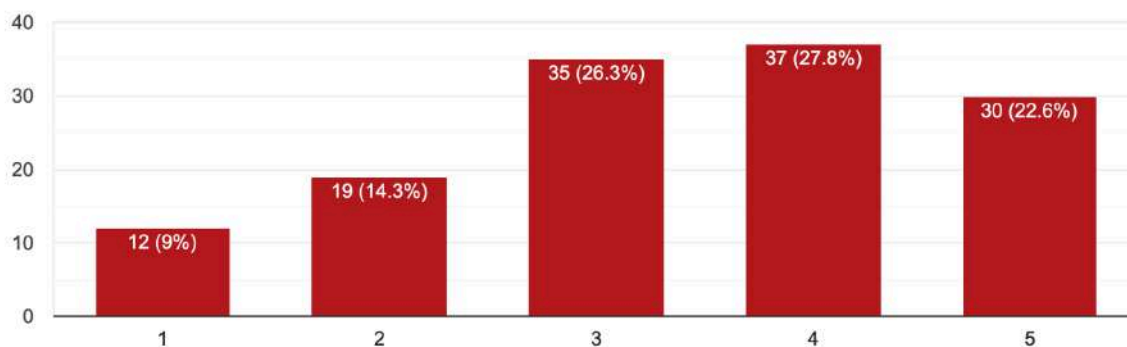
5.3 Ooredoo offre un bon rapport qualité-prix

133 responses



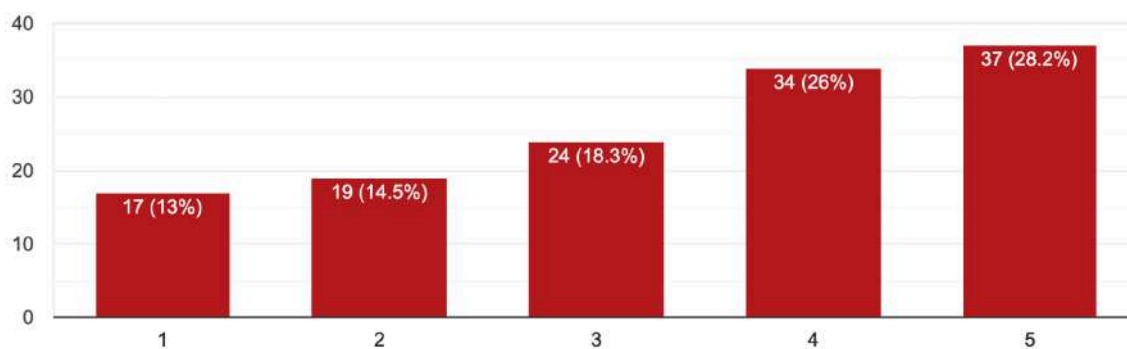
5.4 Globalement, Ooredoo répond à mes attentes.

133 responses



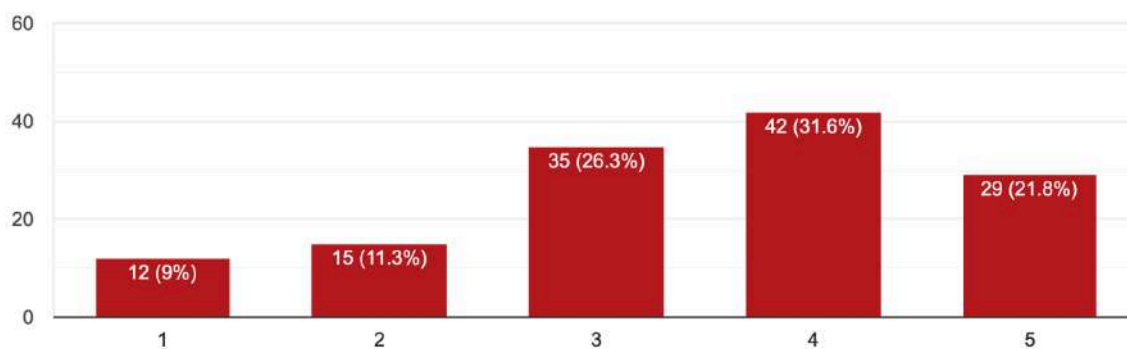
6.1 Si je devais choisir un opérateur aujourd'hui, je choisirais Ooredoo.

131 responses



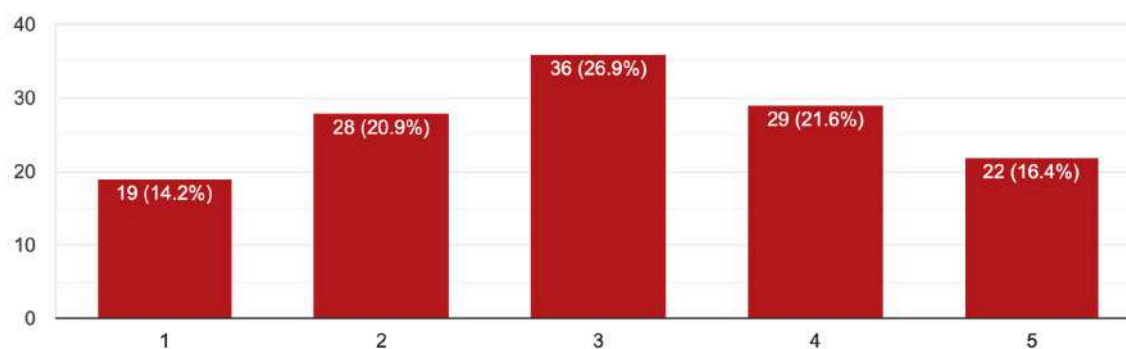
6.2 Je recommanderais Ooredoo à d'autres.

133 responses



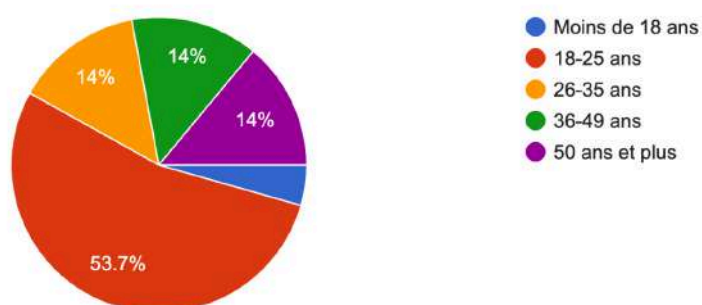
6.3 Les publicités télévisées d'Ooredoo influencent mon choix de rester avec cet opérateur.

134 responses



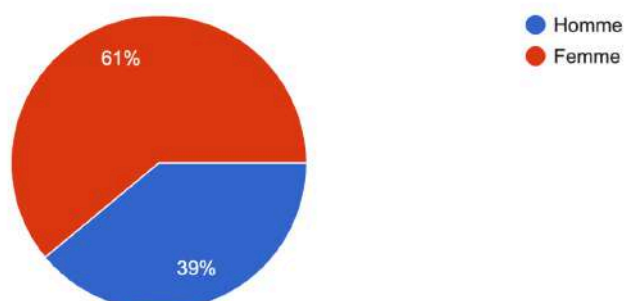
7.1 Quelle est votre tranche d'âge ?

136 responses



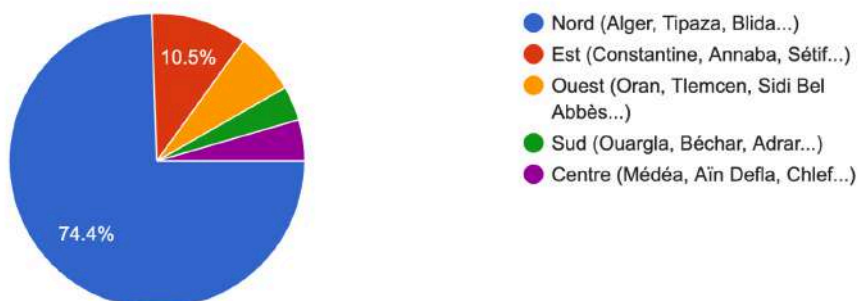
7.2 Quel est votre sexe ?

136 responses



7.3 Zone géographique de résidence

133 responses

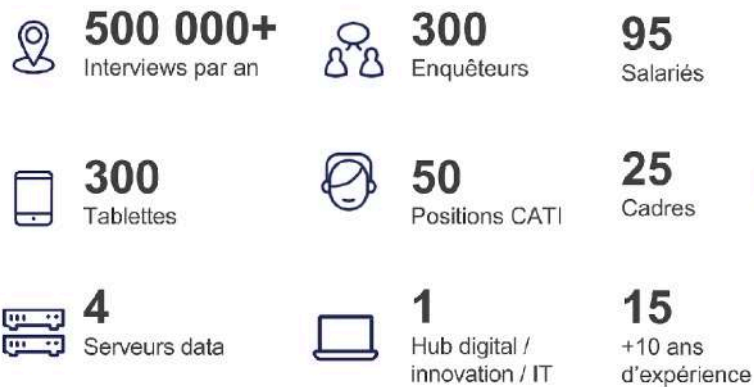


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Appendix D: IMMAR Supporting Schemas and Illustrations

IMMAR Operational Capacities Across the National Territory

Nos capacités opérationnelles couvrent l'ensemble du territoire



IMMAR Digital Innovations

Nos innovations sont spécialement développées pour nos activités

Parce que les pratiques des consommateurs sont spécifiques

Plateformes CRM & mystery shopping
• Optimisez l'**expérience client** en temps réel



Social listening / e-reputation
• Contrôlez et valorisez les retours consommateurs



Etudes cross-media
• Identifiez le mix-media le mieux adapté à votre cible



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12

IMMAR Data Solutions



Diagnostic Data



Analyse du parcours client



BI & Data visualisation



CRM & parcours digital



Analyse de la e-reputation



Modélisation / data science

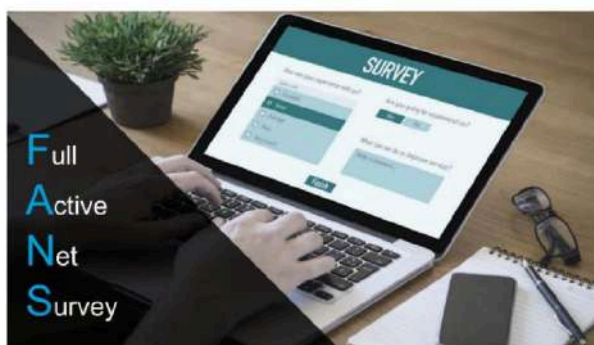
immär

13

FANS Feedback Management Platform

FANS: optimisez l'expérience client et en temps réel

Construire la stratégie sur une écoute continue des clients



-  • Recueil des feedbacks en ligne/SMS
-  • Adaptation à votre parcours client
-  • Alertes en temps réel, relances
-  • Consultation sur portail dédié
-  • Analyses sur mesure
-  • Actions CRM
-  • Module social listening
-  • Module analyse sémantique



15

IMMAR Decision-Support Tools

Notre engagement : au-delà des rapports, des outils d'aide à la décision

Pour vous aider à valoriser les insights et prendre les bonnes orientations

Portails clients dédiés

- Partagez plus efficacement les informations et documents clés



Dashboards interactives

- Produisez des analyses synthétiques et sur-mesure



Workshops

- Alignez l'ensemble des équipes sur des plans d'action gagnants



16

Appendix E: Detailed profile of respondents

Variable	Modality	Frequency (N)	Percentage (%)
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Age	Non-specified response	3	2.2%
	18-25 years	73	52.5%
	26-35 years	19	13.7%
	36-49 years	19	13.7%
	50 years and above	19	13.7%
	Under 18 years	6	4.3%
Gender	Non-specified response	3	2.2%
	Female	83	59.7%
	Male	53	38.1%
Geographic area	Non-specified response	6	4.3%
	Centre (Médéa, Aïn Defla, Chlef...)	6	4.3%
	East (Constantine, Annaba, Sétif...)	14	10.1%
	North (Algiers, Tipaza, Blida...)	99	71.2%
	West (Oran, Tlemcen, Sidi Bel Abbès...)	9	6.5%
	South (Ouargla, Béchar, Adrar...)	5	3.6%

Source: Developed by the author based on SPSS descriptive output.

Appendix B: Detailed television exposure and advertising behavior

Variable	Modality	Frequency (N)	Percentage (%)
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Frequency of television viewing	Non-specified response	1	0.7%
	Never	2	1.4%
	Several times per day	21	15.1%
	Several times per month	13	9.4%
	Several times per week	30	21.6%
	Rarely (less than once per month)	24	17.3%
	Once per day	37	26.6%
	Once per week	11	7.9%
Watching TV advertisements without zapping	Non-specified response	2	1.4%
	Every time (100% of the time)	7	5.0%
	Never	2	1.4%
	Sometimes (25-49% of the time)	32	23.0%
	Rarely (1-24% of the time)	34	24.5%
	Often (50-74% of the time)	40	28.8%
	Very often (75-99% of the time)	22	15.8%

Exposure to mobile-operator TV advertisements	Non-specified response	2	1.4%
	1 time per day	14	10.1%
	1 time per week	18	12.9%
	2 to 3 times per day	34	24.5%
	2 to 3 times per week	14	10.1%
	4 to 6 times per week	12	8.6%
	Less than once per week	28	20.1%
	More than 3 times per day	17	12.2%

Source: Developed by the author based on SPSS descriptive output.

Appendix F: Research Questionnaire

Publicité télévisée et perception de la marque Ooredoo : Questionnaire

Introduction

Ce questionnaire s'inscrit dans le cadre d'un mémoire de fin d'études en master « Management Marketing ». L'objectif de cette recherche est d'évaluer l'impact de la part de voix télévisée sur la perception de la marque Ooredoo en Algérie.

Cette étude vise à analyser dans quelle mesure la présence publicitaire d'Ooredoo à la télévision influence la perception que les consommateurs ont de la marque, à travers quatre dimensions : la notoriété, l'image de marque, la qualité perçue et la préférence de marque.

Le questionnaire est strictement anonyme et confidentiel. Les réponses ne seront utilisées qu'à des fins académiques et le temps de réponse estimé est de 5 à 10 minutes.

Il n'y a pas de bonne ou de mauvaise réponse. L'essentiel est de répondre avec spontanéité et sincérité, selon votre opinion personnelle.

Merci sincèrement pour votre participation.

Partie 01 : Questions d'admissibilité

1. Regardez-vous la télévision ?

- Oui
- Non

2. Quel opérateur mobile utilisez-vous actuellement ?

- Mobilis
- Djezzy
- Ooredoo
- Autre

Partie 02 : Visionnage de la télévision et exposition aux publicités des opérateurs mobiles

1.1 À quelle fréquence regardez-vous la télévision ?

- Plusieurs fois par jour
- Une fois par jour
- Plusieurs fois par semaine
- Une fois par semaine
- Plusieurs fois par mois
- Rarement (moins d'une fois par mois)
- Jamais

1.2 À quelle fréquence regardez-vous les publicités télévisées sans zapper ?

- À chaque fois (100 % du temps)
- Très souvent (75-99 % du temps)
- Souvent (50-74 % du temps)
- Parfois (25-49 % du temps)
- Rarement (1-24 % du temps)
- Jamais

1.3 À quelle fréquence voyez-vous des publicités télévisées d'un opérateur mobile (Mobilis, Djezzy, Ooredoo) ?

- Plus de 3 fois par jour
- 2 à 3 fois par jour
- 1 fois par jour
- 4 à 6 fois par semaine
- 2 à 3 fois par semaine
- 1 fois par semaine
- Moins d'une fois par semaine

Partie 03 : Perception de la présence publicitaire et perception de la marque

Pour chacune des affirmations suivantes, veuillez indiquer votre degré d'accord sur une échelle de 1 à 5 :

- 1 = Pas du tout d'accord
- 2 = Pas d'accord
- 3 = Neutre
- 4 = D'accord
- 5 = Tout à fait d'accord

A. Perception de la présence publicitaire / Part de voix télévisée

SOV1. Comparé aux autres opérateurs, Ooredoo est plus présent à la télévision.

1 2 3 4 5

SOV2. Les publicités d'Ooredoo sont fréquemment répétées.

1 2 3 4 5

SOV3. Les publicités d'Ooredoo ont tendance à être plus longues que celles des autres opérateurs.

1 2 3 4 5

SOV4. Les publicités télévisées d'Ooredoo ont influencé ma perception de la marque.

1 2 3 4 5

B. Notoriété de la marque

BA1. Ooredoo est l'une des premières marques qui me viennent à l'esprit quand je pense aux opérateurs mobiles.

1 2 3 4 5

BA2. Je peux facilement reconnaître les publicités d'Ooredoo.

1 2 3 4 5

BA3. Je peux facilement distinguer Ooredoo des autres opérateurs.

1 2 3 4 5

C. Image de marque

BI1. Ooredoo me semble être une marque digne de confiance.

1 2 3 4 5

BI2. Ooredoo me semble être une marque innovante.

1 2 3 4 5

BI3. La publicité d'Ooredoo donne une image positive de la marque.

1 2 3 4 5

BI4. La publicité d'Ooredoo crée une impression favorable.

1 2 3 4 5

BI5. Les publicités d'Ooredoo me donnent envie de m'identifier à la marque.

1 2 3 4 5

D. Qualité perçue des services

PQ1. Ooredoo fournit des services de haute qualité.

1 2 3 4 5

PQ2. Les publicités d'Ooredoo me donnent confiance dans la qualité de ses services.

1 2 3 4 5

PQ3. Ooredoo offre un bon rapport qualité-prix.

1 2 3 4 5

PQ4. Globalement, Ooredoo répond à mes attentes.

1 2 3 4 5

E. Préférence de marque

BP1. Si je devais choisir un opérateur aujourd'hui, je choiserais Ooredoo.

1 2 3 4 5

BP2. Je recommanderais Ooredoo à d'autres personnes.

1 2 3 4 5

BP3. Les publicités télévisées d'Ooredoo influencent mon choix de rester avec cet opérateur.

1 2 3 4 5

Partie 04 : Profil des répondants

7.1 Quelle est votre tranche d'âge ?

- Moins de 18 ans
- 18-25 ans
- 26-35 ans
- 36-49 ans
- 50 ans et plus

7.2 Quel est votre sexe ?

- Homme
- Femme

7.3 Quelle est votre zone géographique de résidence ?

- Nord (Alger, Tipaza, Blida, ...)
- Est (Constantine, Annaba, Sétif, ...)
- Ouest (Oran, Tlemcen, Sidi Bel Abbès, ...)
- Sud (Ouargla, Béchar, Adrar, ...)
- Centre (Médéa, Aïn Defla, Chlef, ...)

Merci pour votre précieuse collaboration.