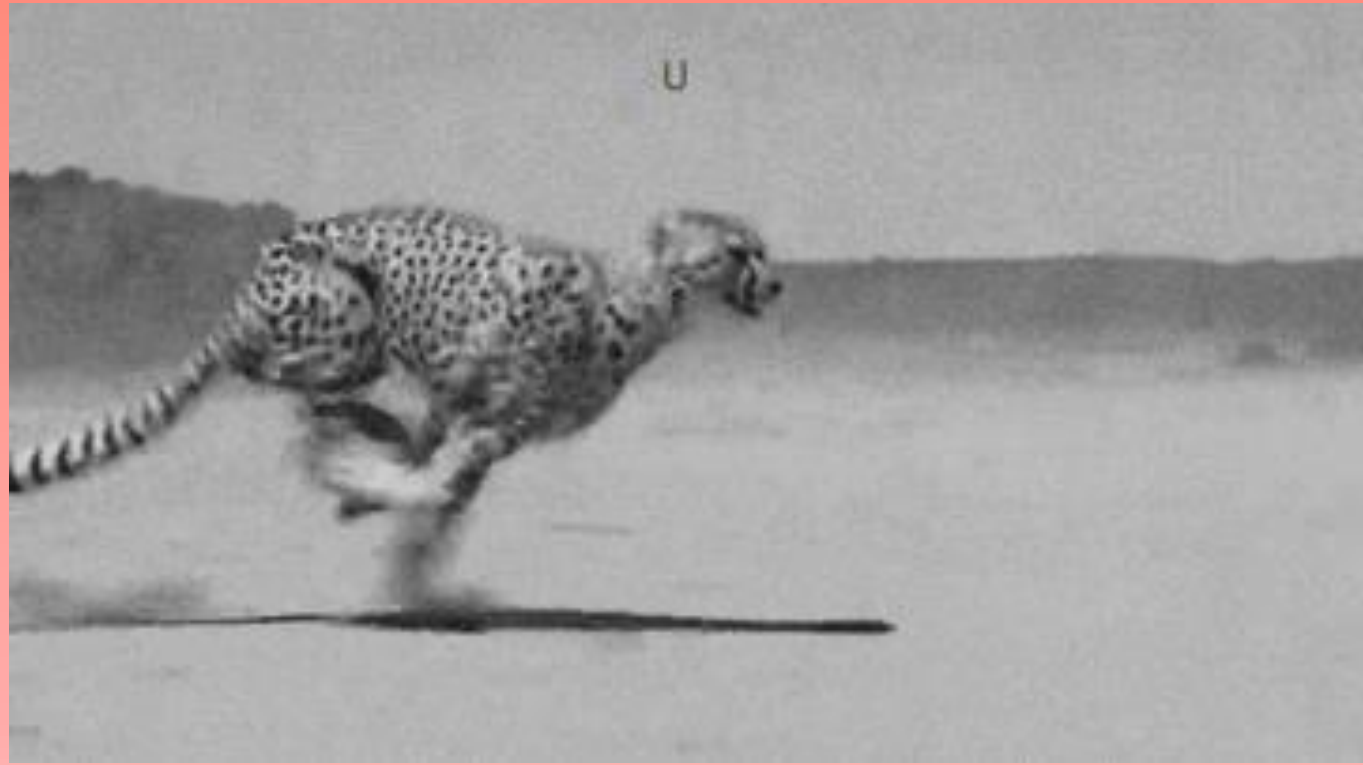




The In-house Agency Brand Advantage

Mat O'Brien

Executive Creative Director





Three UK: Helping Peter Pan come of age: Three and the effectiveness of grown-up marketing

Three reached record consideration levels and created an incremental revenue uplift of £189m.



The challenges Three was facing in 2021

A Network struggling with its image

- Poor network perceptions
- Not one of the big Networks
- Only known for mobile
- No longer seen as 'good value'

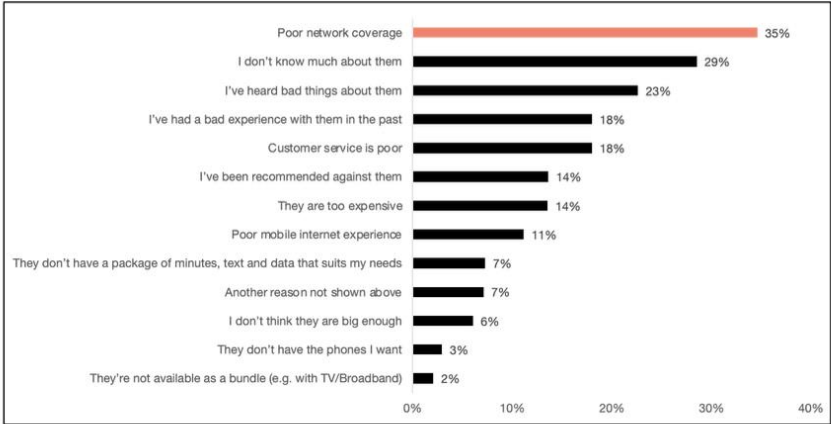
A 'Peter Pan' brand for young people

- Lacking distinctiveness in a consistently distinctive category
- Seen as for 'young people'
- Insufficient headroom for growth
- Not visible enough in media

Losing out on a race to the bottom

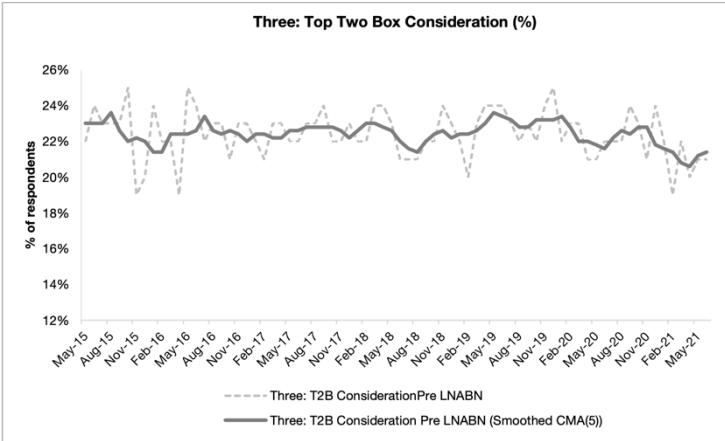
- The UK Telco market was increasingly cluttered – leading to Three struggling for awareness and growth
- After years of gains, Three had started to plateau

Figure.1 'Poor Network Coverage' as the primary reason for Rejecting Three 2021



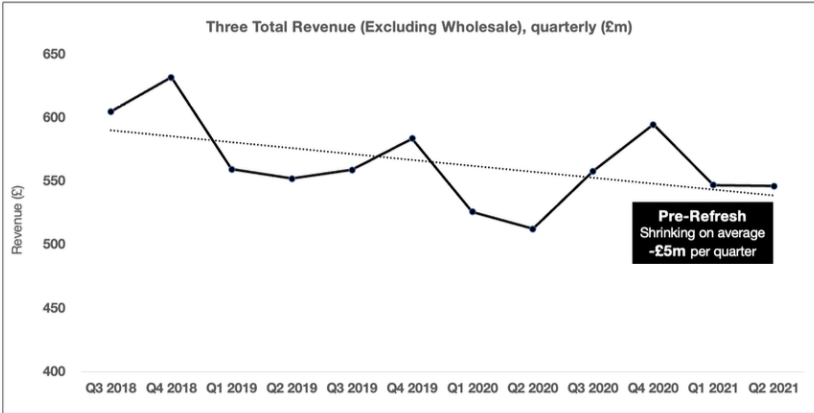
Source: Ipsos Mori, Jan 2016-June 2021.

Figure.8 Brand consideration in long-term decline



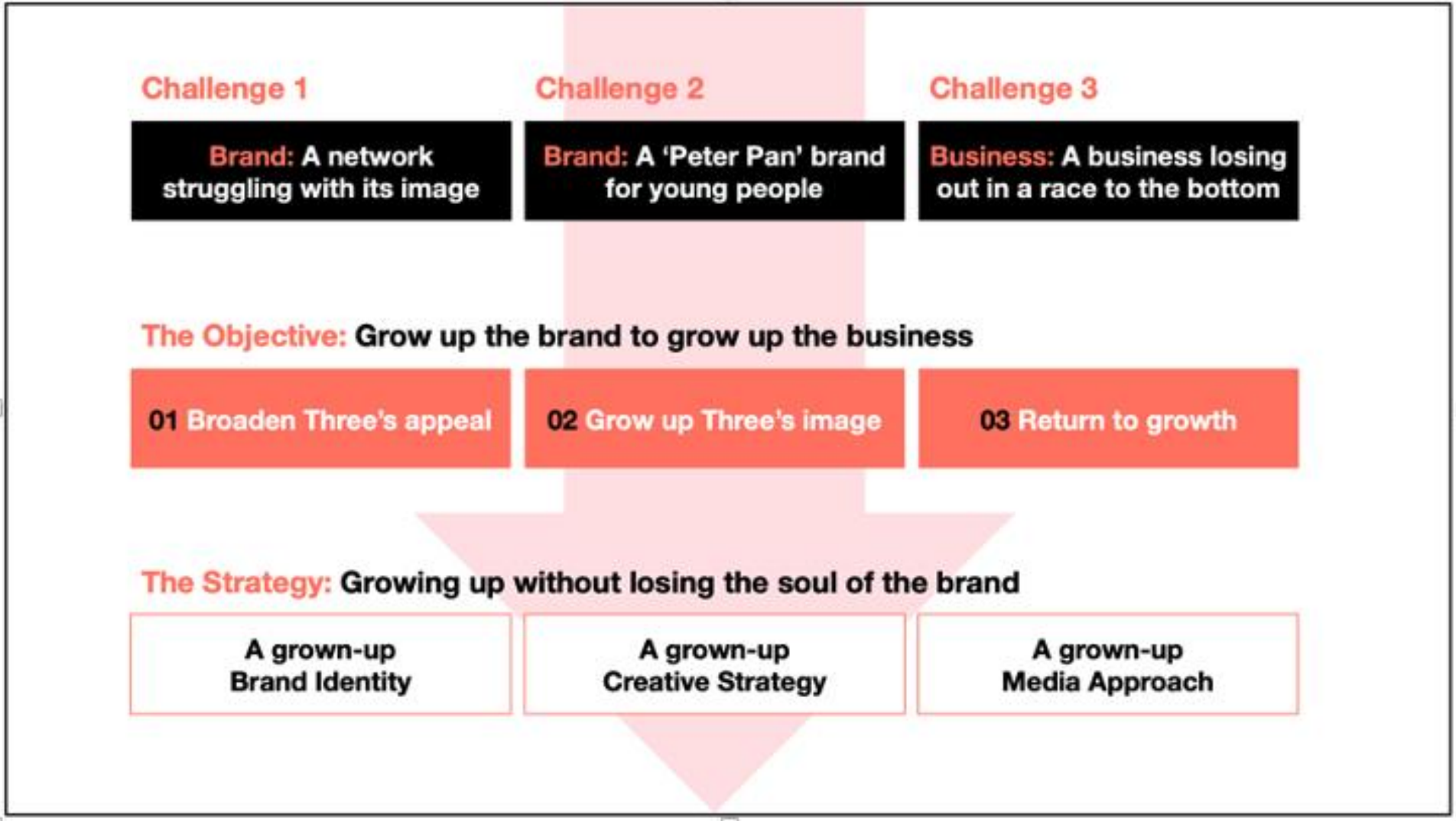
Source: Ipsos Mori, Top Two Box Consideration, May 2015-June 2021.

Figure.14 Three Total Revenue in decline by -£5m per quarter



Source: Three Insights, Revenue (Excl. Wholesale=Wholesale is revenue from MVNOs)

And how we strategically addressed this



let them know
you'll be home
Swoooooonwww
xxhxxx xxxx
xssxc !!!0!!!



3 #PhonesAreGood
On the Best Network for Data

2min
walk?

Lo!



Uber

3 #PhonesAreGood
On the Best Network for Data

Bad
face day.
Long live
sexy
bunny lens.



3 #PhonesAreGood
On the Best Network for Data



Crush lag.
Then
your
nemesis.



3 We're building the UK's fastest 5G network

5G smart
home... feed me



3 We're building the UK's fastest 5G network

London,



is in the house.
No landline. No engineer. Forget fibre.
Be the first to join.

Christmas Gift Guide 2020

Add some
sparkle
With gifts that keep on giving

Unlimited data

1 month
£26 a month
+ unlimited minutes and texts



3 Ready at no extra cost

new PayAs
YouGo
**Super
charged**

New Pay As You Go from Three is here, and we think your customers are going to love it.

Auto-renew
Your next Data Pack is always ready

Real-time info
Track your spend and usage instantly

Flex your spend
Choose how much you spend each month



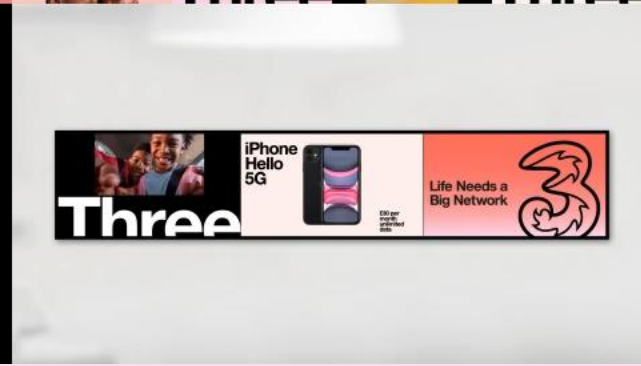
3 Ready at no extra cost

Three



Zoom

Pocket
dial almost
anywhere
with
99% UK
coverage





Life Needs Midnight Mums' Club





**Our
network
goes far
and wide**



**Yours
is joined
at the hip**

**Our
network
is reception
bars**



**Yours
is silly
dances
in actual
bars**

**Our
network
is gigahertz**

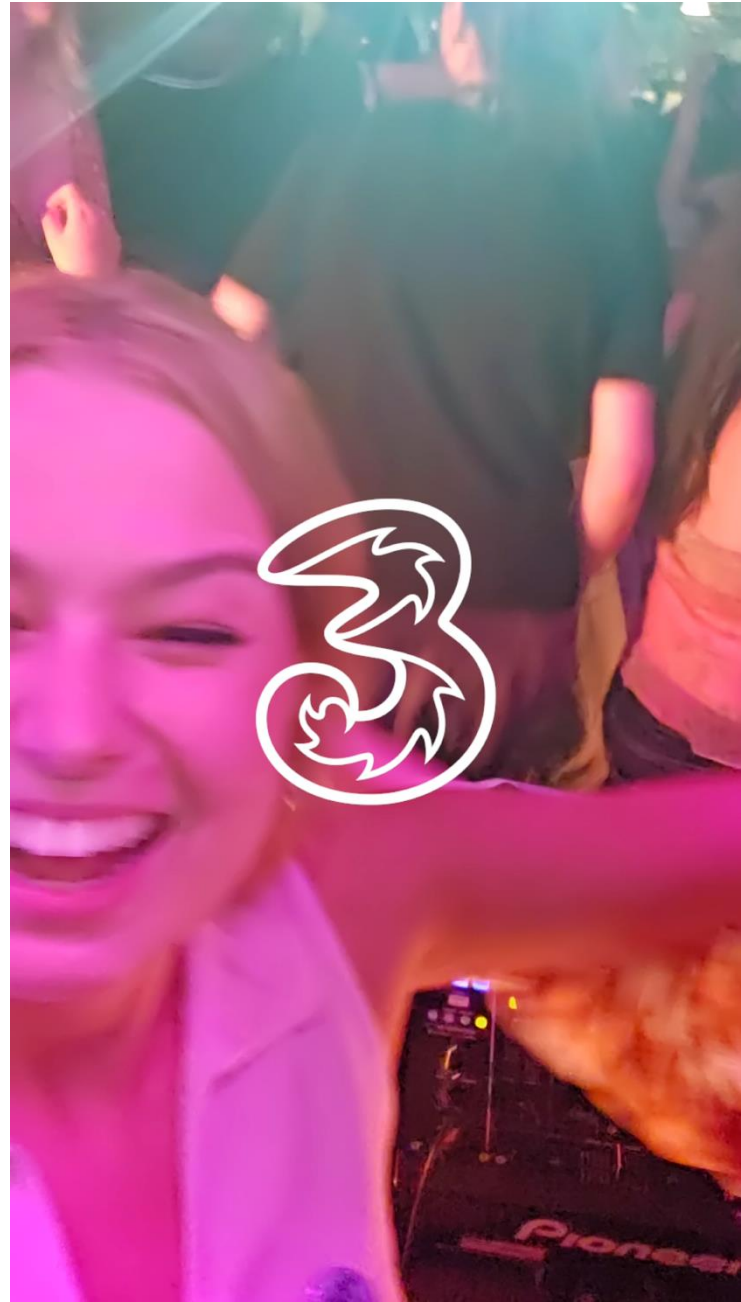


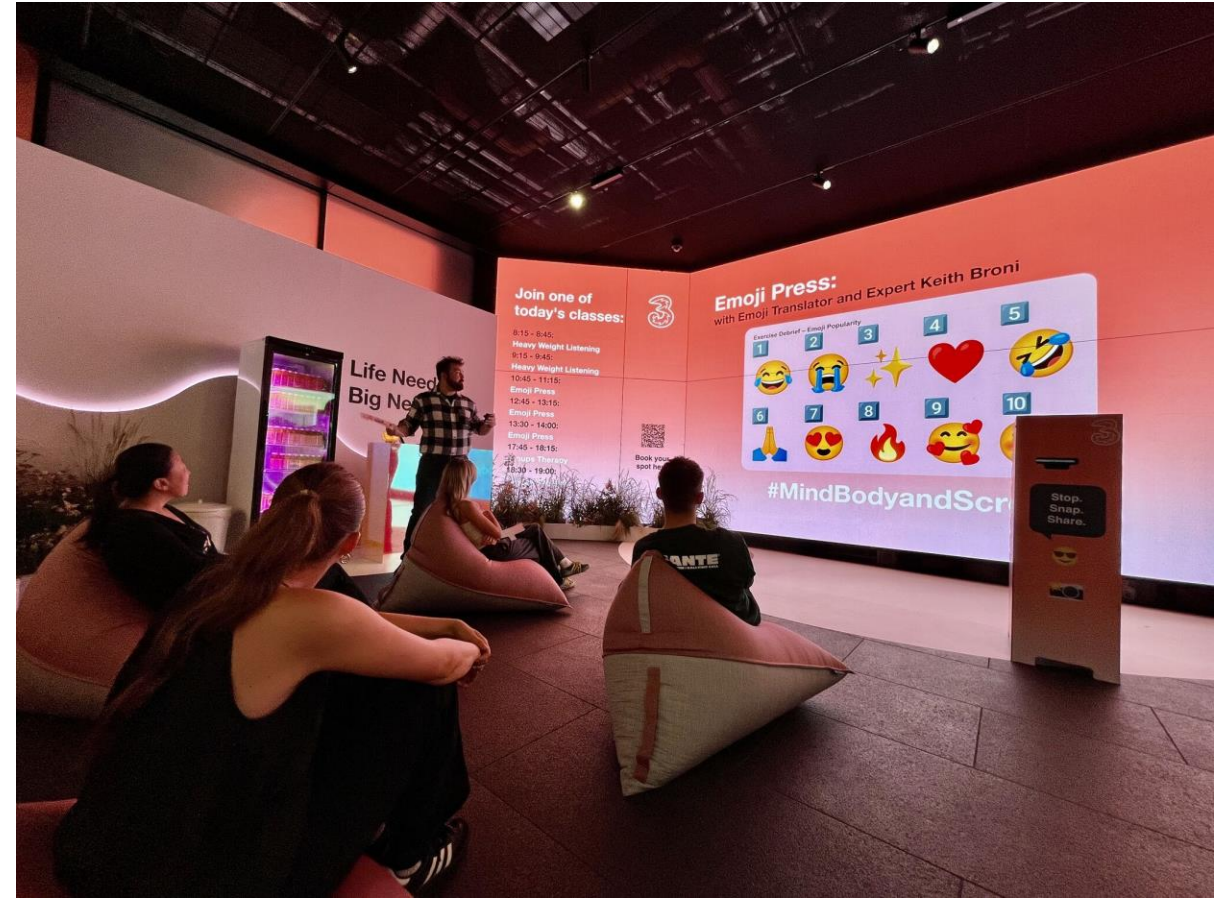
**Yours
is giggling
so much
it hurts**

**Our
network
uploads**



**Yours
offloads**





Advantage

Advantage

Advantage



Ambition

Ambition

Ambition



Direction

Direction

Direction

vision

vision

vision

Access

Access

Access

no

Trust

Trust

Trust

Alignment

Alignment

Alignment

Guidance

Guidance

Guidance

Execution

Execution

Execution



AMBITION
DIRECTION
VISION
ACCCESS
NO
TRUST
ALIGNMENT
GUIDANCE
EXECUTION



