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Case Study



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Agencies
Bear Meets Eagle On Fire
+ Telstra

Client
Telstra

Title
How Telstra went from engineering-led to brand-led growth

Category
A07. Telecommunications, Utilities and Other Services

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Q1. EXECUTIVE SUMMARY & WHY DOES THIS CASE DESERVE AN AWARD?

TITLE: HOW TELSTRA WENT FROM ENGINEERING-LED TO BRAND-LED GROWTH

Telstra didn't have a performance problem; it had a perception problem. Despite operating Australia's most extensive and reliable network, Telstra had become defined by the wrong things: expensive, corporate and distant. As more than 40 low-cost competitors flooded the market - often leveraging the very same infrastructure - network superiority alone was no longer enough to justify a premium. In a cost-of-living crisis, Australians were asking a far more confronting question: *is Telstra really worth paying more for?*

At the same time, marketing investment was declining, competitors were outspending, and the brand had become trapped in functional, offer-led communication that reinforced its least human traits. The premium was under real threat.

Our strategy was simple: if we wanted to change how people felt about Telstra, we needed to change how Telstra felt. We moved the brand from functional connectivity to possibility, reframing Telstra not as a provider of networks, but as a partner in what connection makes possible in people's lives. This was expressed through *Wherever We Go*, a distinctive, imaginative platform designed not just to communicate, but to create a world people wanted to step into.

From the hand-crafted visual world to the playful, human tone, every touchpoint was designed to make Telstra feel warmer, more imaginative and more connected to real life. And when the campaign's "Telstrut" behaviour escaped advertising and became a cultural phenomenon the brand stopped being something people saw and became something people did.

Brand Impact

- [redacted]Brand metrics reached record highs, [redacted]
- Critically, perceptions of being "worth paying more for" - the metric most tied to premium growth - saw significant increases among both customers and non-customers.
- Telstra rose from #17 to #9 among Australia's strongest brands and #5 Telco brand globally

Commercial Impact

- Telstra's second-largest revenue-driving campaign
- Postpaid activations up [redacted], driving sustained growth
- [redacted] increase in Postpaid market share since 2024

[redacted]

In a category increasingly defined by functional parity and price competition, *Wherever We Go* is proof that consumers will pay more for a brand they value.

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Q2. WHAT WAS THE STRATEGIC COMMUNICATIONS CHALLENGE?

Telstra wasn't suffering from a capability problem. It was suffering from a perception problem:

For decades, Telstra had built one of Australia's strongest and most extensive networks - an engineering and infrastructure powerhouse connecting millions of Australian Consumers and Businesses every day. Functionally, it was respected. Emotionally, it felt distant.

For many Australians, particularly non-customers, Telstra had come to represent the category's least human traits: *expensive, corporate, monopolistic and profit-driven* [CHART 1]. And while Telstra remained one of Australia's most valuable brands, it had also become one of its most mistrusted.[1]

The Australian mobile market had fundamentally changed:

Over the past decade, the category had been flooded by 40+ low-cost challengers, many of them Mobile Virtual Network Operators (MVNOs) piggybacking on the infrastructure of major carriers. In doing so, they reshaped competition around price and redefined what Australians considered "good value".

As challengers leveraged the same underlying networks, network superiority became harder to communicate and easier for consumers to overlook. Functional parity across the category was increasing, making differentiation more difficult [CHART 2]. At the same time, upgrade cycles were slowing, with 76% of Australians holding onto their phones for more than three years[2].

Growing cost-of-living pressure was placing greater scrutiny on price:

Consumer confidence remained low[4] and 7 in 10 Australians said they were considering switching mobile providers to help manage rising costs[5].

Against this backdrop, Telstra had also introduced annual price increases, [redacted][6]. In this environment, consumers were no longer just asking, "*Who has the best network?"* They were increasingly asking, *"Is it worth paying more for?"*

The business needed to deliver long-term brand transformation under growing short-term pressure:

As competition intensified, Telstra entered its eighth consecutive year of media investment decline, [redacted]. More than 80% of investment had shifted into short-term performance activity, limiting the brand's ability to build long-term differentiation.

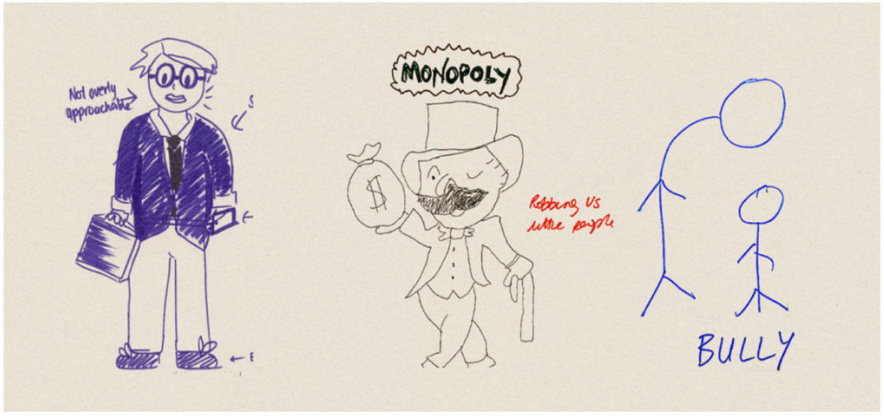
At the same time, competitors were increasing spend. In 2024, [redacted], Telstra dropped out of Australia's top 10 advertisers [redacted]

Simply spending our way to growth was no longer viable. To defend our premium position, we needed to strengthen not just perceptions of network leadership, but the emotional value of the brand itself.

We faced a fundamental <u>strategic challenge</u>:
How do you sustain a premium when functional superiority alone is no longer enough?

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CHART 1: Customer drawings depicting the Telstra brand



Source: Torch for Telstra nationally representative ethnographic research study, 2023

CHART 2: Competitor network challenge advertising



Source: screengrabs of competitor advertising

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Q3. WHAT WERE YOUR OBJECTIVES? State specific goals.

Objective 1 – Get noticed, whilst experiencing a reduction in media investment:

Target 1: Improve Campaign Awareness vs [redacted] by 5%

Target 2: Improve Campaign Recall vs [redacted] by 5%

Objective 2 - Overachieve on brand metrics:

Target 2: Improve brand NPS by 50%, [redacted]

Target 3: Increase Brand Reputation (Reptrak) score to [redacted]

Target 3: Brand Strength: Top 10 brands in Australia

Objective 3 – Drive price premium and sales growth:

Target 1: Worth Paying More (with non-customers & customers) [redacted]

Target 2: Increase Postpaid activations +[redacted]

Target 3: Drive incremental digital acquisition growth of [redacted]

Target 4: Grow Postpaid market share by [redacted]

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Q4. WHAT WAS YOUR STRATEGY AND HOW DID YOU GET THERE?

From a mirror to a magnet:

Much of Australian advertising had become indistinguishable, the same lifestyles, montages and emotional cues repeated across every category [CHART 6]. Brands were reflecting life back at people, rather than creating feelings and ideas people wanted to be drawn into.

Telstra's marketing wasn't even doing that. It was trapped in a system of offer-led messaging, functional and corporate [CHART 7].

We know consumers are more willing to pay a premium for brands that are emotional and highly creative [7]. If we wanted to change how people feel about Telstra, we needed to change how Telstra felt. Our ambition was to turn Telstra from a corporate system into a living, breathing brand - a magnet, not a mirror.

To do this we wanted to be distinctly cohesive, not dogmatically consistent:
Marketing treats brand as a science, we break them into parts, build identity systems and optimise for recognition. Rather than chasing rigid consistency, we focused on building a distinctly cohesive brand [CHART 8]. One connected not by repetitive assets, but by an evolving character, tone and story people could feel and connect with over time.

We needed to maintain scale while feeling more human:
Telstra's "Big Australia" scale was one of its greatest strengths, but also one of its biggest challenges, reinforcing perceptions as corporate, distant and institutional. To build emotional connection, we needed to shift from speaking to Australia as a whole to speaking to Australians as individuals - becoming more accessible, humble and emotionally relevant. That meant moving beyond infrastructure-led storytelling about towers, cables and coverage, and focusing instead on the role connection plays in everyday life.

From connectivity to possibility:
In a world where technology is often framed through disruption and concern, we saw an opportunity to create a brand that felt on people's side. Grounded in Telstra's purpose - *to build a connected future so everyone can thrive* - we shifted from talking about infrastructure to showing the real human impact and possibilities connection can unlock.

To do that credibly, Telstra couldn't just talk about possibility - it had to show up differently for customers. We moved from a provider mindset to a partner mindset, turning connectivity into something human, helping people feel more capable, confident and connected to what matters most.

The strategic proposition:
Through partnership, better things are possible

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CHART 6: Snapshot of Australian advertising



Source: Selection of screen-grabs from Australian brand advertising

CHART 7: Systemised Telstra marketing



Source: Telstra

CHART 8: A cohesive brand world

CONSISTENCY	COHESION
LOOKS THE SAME	FEEL THE SAME
REPETITIVE	DISTINCT
TEMPLATED	COHERENT
PASSIVE	MEMORABLE
SHORT-TERM	LONG-TERM

Source: TELSTRA BRAND STRATEGY, 2024

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Q5. HOW WAS YOUR STRATEGY BROUGHT TO LIFE?

We designed a brand idea that would take Telstra to a more imaginative and emotional place. We believed Australians would pay more for a network that felt meaningfully different, not just technically better.

Wherever We Go is a creative expression of possibility and partnership. It was designed to feel emotionally distinctive: warm, imaginative, human and full of possibility. [Chart 9]

Building a brand Australians could feel, we reimagined Telstra:
An imaginative brand with possibility at our heart.
Ambitious in our ideas. Humble in our voice.
Always crafted with the human hand.
Generous in our spirit and user-friendly.
Playful, warm and full of wonder.

Making Telstra impossible to ignore:
Wherever We Go launched with *Duet*, a simple but emotionally powerful film created by Oscar-nominated animation duo Smith & Foulkes. The film followed two characters moving through life together in harmony, a metaphor for partnership and connection. [CHART 10]

The campaign debuted during two of Australia's biggest cultural moments, the AFL and NRL Grand Finals placing Telstra at the centre of national attention. Every touchpoint was reimagined through the lens of partnership, from stadium integration to Katy Perry's Telstra pre-match performance.

But our ambition wasn't just reach, it was cultural resonance. We believe one of the clearest signs a brand idea is working is when it escapes advertising and becomes behaviour.

The campaign's distinctive "whistle walk" evolved into a viral TikTok trend dubbed the *Telstrut*, recreated more than 6,000 times and generating over 29 million views[8]. What began as a brand behaviour became a cultural one. We amplified this momentum through a bespoke *State of Origin* execution incorporating creator, player and fan-generated content from across the social ecosystem, extending the platform from a campaign into a participatory experience.

And the *Telstrut* kept travelling, from try celebrations and girls' nights to Disneyland and even the North Korean border, people were imitating Telstra advertising. Something almost unheard of for an Australian brand, let alone a telco [CHART 11]. Telstra also dominated TikTok share of search (increasingly how young people discover brands) accounting for 90% of all telco searches on the platform[8].

We created a brand world Australians could instantly recognise and emotionally feel:

To reinforce a sense of permanence and partnership, the *Wherever We Go* visual world extended into 3,000 out-of-home sites, including 40 special builds and hand-painted murals [CHART 12]. Rather than relying on the polished digital aesthetics typical of the category, the brand was intentionally tactile and crafted by hand. Illustrations by Ben Hassler were recreated as layered paper sculptures in collaboration with artist Kyle Bean and photographer Carl Kleiner [CHART 13].

The result was a distinctive visual identity that felt warmer, more human and unmistakably Telstra, designed not just to be recognised, but to draw people in.

Wherever We Go was embedded across sponsorships, retail, digital platforms, events and customer experiences, creating a cohesive brand world across every touchpoint. This consistent visual fabric gave Telstra a more distinctive and emotionally recognisable presence, transforming the brand from a series of disconnected communications into a unified world Australians could instantly recognise and feel [CHART 14].

The shift was beginning to resonate with customers. [CHART 15]

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Now we're taking Wherever we go even further

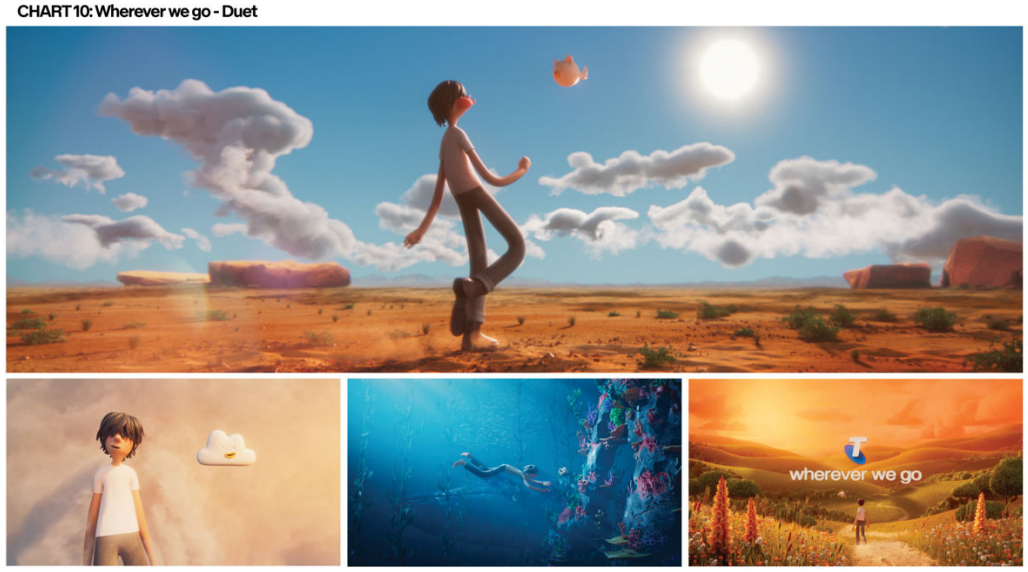
Wherever We Go was never designed as a one-off campaign. In February 2026, to launch the new AFL and NRL seasons, we introduced *Wherever We Go* 2.0 [CHARTS 16 & 17].

This next chapter built on the growing cultural scale of the Telstrut. Inspired by The Age describing the campaign as a "cultural phenomenon", we evolved the story from an individual expression into a collective one. To bring this to life, our hero character Mick becomes the catalyst for an epic and joyful *Wherever We Go* journey that travels across Australia, drawing more people into the world of the brand.

CHART 9: Telstra brand idea



CHART 10: Wherever we go - Duet



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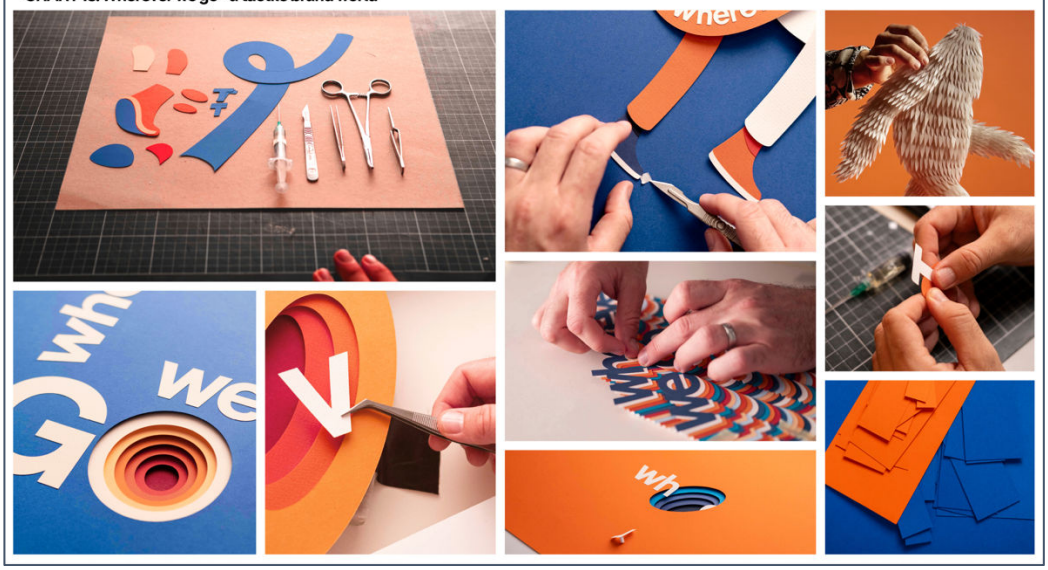
CHART 11: Telstrut in culture



CHART 12: Wherever we go - OOH



CHART 13: Wherever we go - a tactile brand world



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CHART 14: Wherever we go - brand world extensions

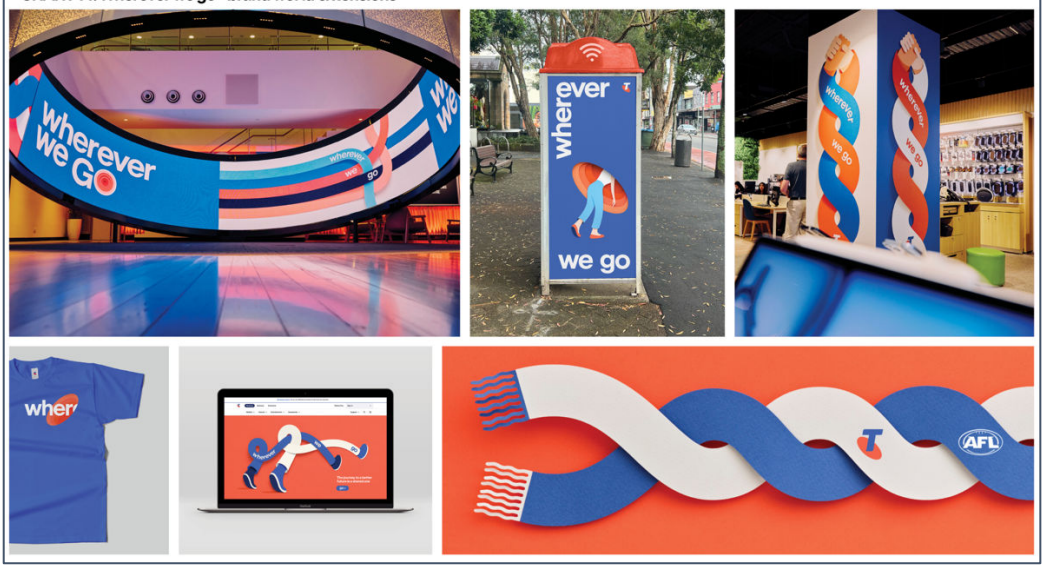


CHART 15: Wherever we go - consumer reaction

"They've got these really beautiful, very graphic posters out at the moment.

The thing that makes the posters connected to each other, no matter where I see them, is the graphic design.

It's very tailored and handcrafted.

To me Telstra is so Aussie and so daggy, I just thought this is a cool angle for them.

The image of the brand is premium, makes me feel the service must be pretty good."

Small Business Owner

Can you please start advertising on bus shelters in NSW again in January 2025. Thank you.

- Customer

Source: Telstra Customer Feedback

CHART 16: Wherever we go 2.0



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CHART 17: Wherever we go 2.0 - OOH



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Q6. HOW DO YOU KNOW THAT YOUR CAMPAIGN WAS SUCCESSFUL?

Objective 1 - Get marketing noticed, whilst experiencing a reduction in investment

Target: Improve Campaign Awareness vs Telstra [redacted]
Outcome: 37% awareness of the Wherever We Go brand ad (nearly double norm of 20%) [CHART 18] and 48% awareness of total brand campaign, the highest ever for Telstra.

Target: Improve Campaign Recall vs [redacted]
Outcome: 72% of those who recognise the ad can recall the brand [redacted] [CHART 18].

BUT WAIT, as advertising doesn't often get earned coverage, particularly brand advertising we didn't expect to. **HOWEVER,** *Wherever We Go* was voted Australia's most unforgettable ad of 2025 by Cubery, scoring nearly double the second-ranked spot despite Telstra falling out of the Top 20 spenders. We generated $717k in earned media value with *The Age* described it as "a cultural phenomenon." [CHART 19].

The campaigns Telstrut generated over 29 million views equating to approximately $812K in media[9] value. The Telstrut also drove a measurable search halo. During the peak of the Whistle Walk trend (June–September 2025), Telstra generated 119,124 TikTok searches and captured 93% Telco share - ranking #1 out of 6 competitors and effectively owning the entire telco category on platform.

Objective 2 - Overachieve on brand metrics:

Target 1: Improve brand NPS by 50%, [redacted]
Outcome 1: [redacted] [CHART 20]

Target 2: Increase Brand Reputation (Reptrak) score [redacted]
Outcome 2: [redacted]

Target 3: Brand Strength: Top 10 brands in Australia
Outcome 3: Went from #17 in 2022 to #9 place in 2026 [CHART 22] and top 5 in the Global Telecoms Comparison.

[redacted]

Objective 3 – Drive price premium and sales growth:

Target 1: Worth Paying More For (with non-customers & customers) up 1pt
Outcome 1: [redacted] [CHART 23].

Crucially, this uplift continued to build post-campaign, indicating a structural shift in how customers perceive Telstra's value, not a short-term advertising effect.

The campaign achieved an even more challenging outcome: shifting perception among non-customers, an audience who have no direct experience of Telstra's product belief it is worth paying more for increased [redacted] widening Telstra's lead over all competitors [CHART 24].

This is particularly significant:

- Changing **perceptions among existing customers reinforces retention and value**
- Changing **perceptions among non-customers creates new demand and unlocks future growth**

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Together, this shows the campaign didn't just drive awareness it reset the value narrative across the entire category. Telstra moved from a premium people paid for, to a premium both customers and non-customers believe is worth more.

Target 2: Increase Postpaid [redacted]%
Outcome 2: The brand shift translated directly into **commercial impact driving double digit growth**

[redacted] well above the +8% target an exceptional result for a market leader, demonstrating the ability to drive incremental growth at scale despite already dominant share.[CHART 25].

Beyond that we can see that activation growth wasn't just a short term tactical increase but sustained growth over time – showing the true power of brand work. (CHART 26)

Target 3: Drive incremental digital acquisition [redacted]
Outcome 3: The campaign successfully drove digital growth and in doing so **attracted a new audience**

[redacted], significantly exceeding target and confirming the brand campaign's ability to engage beyond Telstra's traditional customer base. Crucially, this growth was driven through lower-cost digital channels, improving efficiency and reducing reliance on higher-cost service interactions. [CHART 25]

Target 4: Grow market share by [redacted]
Outcome 4: [redacted].
[CHART 27]

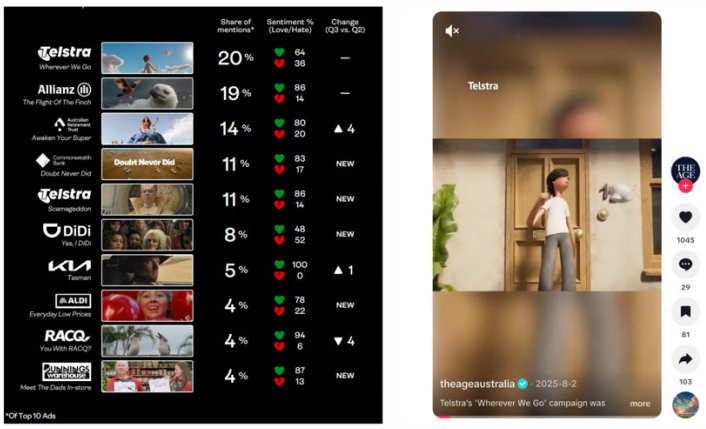
This growth was achieved despite Telstra holding a sustained price premium **([redacted]**.

Telstra's brand strength didn't just defend its position it shifted customer behaviour at scale, consolidating market leadership as competitors lost ground.

Further evidence of the impact our brand activity had on market share was our Postpaid gains vs our competitors.

This was not a one-off uplift it set up full-year leadership, with Telstra finishing FY25 at [redacted]

CHART 19: Australia's most unforgettable advertising



Source: The Cubery HOT LIST: Q3 2025 & The Age Australia Tiktok

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Q7. WAS THE CAMPAIGN A GOOD INVESTMENT?

Telstra brand marketing translated into measurable business impact (between Sep 24 – Jan 26):

[redacted]

Seeing a brand building campaign show up as a high performer for ROAS and revenue is rare. *Wherever We Go* directly challenged that, becoming Telstra's second-highest revenue-driving campaign in FY25, beating out key trading campaigns [CHART 29]. Moreover, Christmas is a key **retail period: '**[redacted][10] [CHART 30].

Now, when calculating the 'campaign' ROI please note:

The marketing mix model isolates incremental revenue directly attributable to *Wherever We Go*, providing a robust and conservative view of performance. Importantly, this represents only a portion of total impact. **The model is limited to new activation revenue and does not capture the significant contribution driven through our existing customer base, where the majority of our scale sits.**

In addition, the WWG TV attribution excludes broader brand halo effects across other channels and campaigns, meaning cross-campaign uplift is not reflected. Taken together, these constraints suggest the true commercial impact of WWG is materially higher than reported what we are seeing is a deliberately conservative approach.

[redacted]

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Q8. DEMONSTRATE THAT THE RESULT WAS NOT DUE TO OTHER FACTORS

The iPhone 17 launch did not drive Telstra's postpaid growth.

[redacted]

Price rises alone do not explain Telstra's revenue growth

[redacted]

The Optus outage had limited impact on Telstra's growth.

While the September 2025 Triple Zero outage caused significant reputational damage for Optus after some customers were unable to contact emergency services for approximately 13 hours, Telstra had already established category leadership well before the event.

[redacted]

The MMM model is built to isolate the impact of advertising spend with statistical accuracy:

[redacted]overall contribution to total revenue is likely to be significantly higher than what is being surfaced by the marketing mix model. The model was designed to focus on customer acquisition, and accounts for the first month's revenue recognised on new contracts only. As such, it would not report on advertising's contribution to customer retention, renewal rates, product cross-sell or upsell activities.

[redacted]

GIVE CONTEXT TO BUDGET IN COMPARISON TO COMPETITORS.

Budget declined compared to competitors [CHART 33]

GIVE CONTEXT TO THE BRAND'S OVERALL BUDGET.

Brand budget is less

MEDIA BUDGET ELABORATION

[redacted]

DESCRIBE OWNED MEDIA ACTIVITY

Corporate Communications: [redacted]
Customer Marketing: [redacted]

Telstra Digital*:* [redacted]

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OUTLINE ANY SPONSORSHIPS

[redacted]

OUTLINE COMMUNICATION TOUCHPOINTS

TV/BVOD/Digital Video
Cinema
OOH
AFL & NRL Integration Assets
Social
Telstra Owned Channels

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