

Mobile Britain

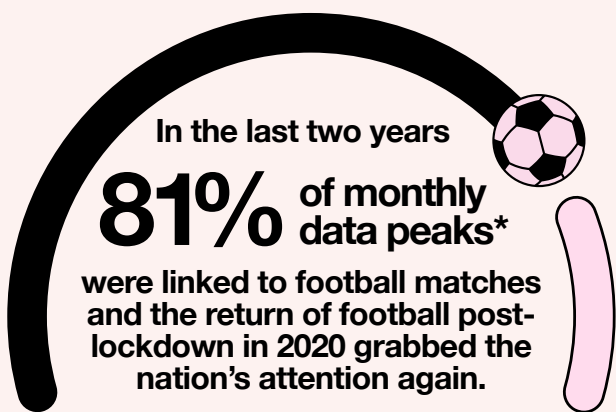
2022



How we are swiping,
sharing and connecting.

How Brits do data: Football crazy

2021 was a year of sporting highs, with the return of live sport post pandemic. Everything from the Olympics to the US Open, The Ashes to the Grand National and, of course, football has been back on our screens. Despite sporting successes across the board, it's clear that we remain a football-obsessed nation.



We saw a peak in SMS at the end of the EUROS quarter final (10-11pm) up 19% vs the previous Saturday in which England triumphed.

+19%
% uplift

Saturday 27th June

Saturday 3rd July

1.58m

1.88m

SMS messages between 10-11pm

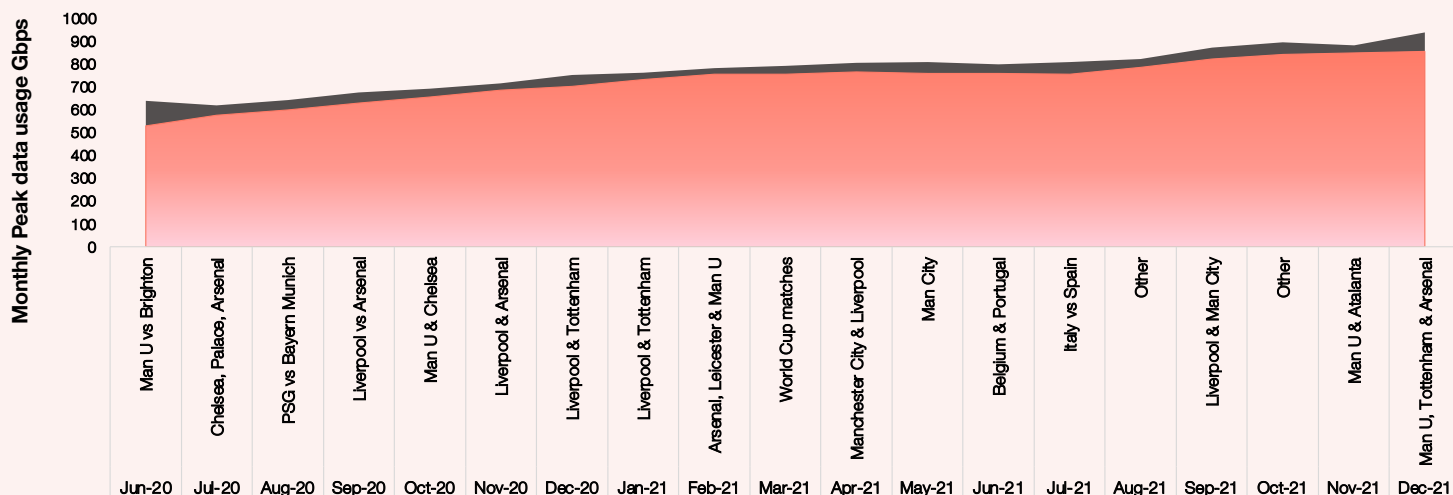
SMS here is consumer SMS (combination of sent and received from other networks)

EUROS Monthly data peak in **June 2021** was during **Belgium vs Portugal**

EUROS Monthly data peak in **July 2021** was the **EUROS semi-final Italy vs Spain**

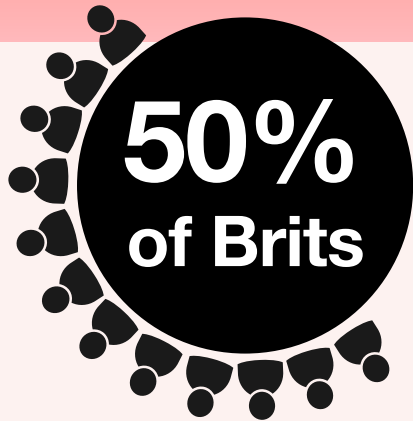
Peak Data Usage* vs. Average Peak Data Usage due to Football Matches

*During busiest hour of the month



How Brits do data: The Sunday evening binge

Sunday evening streaming has been steadily increasing year on year. A third of people now say they are more likely to watch a TV or film on a Sunday than they were 5 years ago.

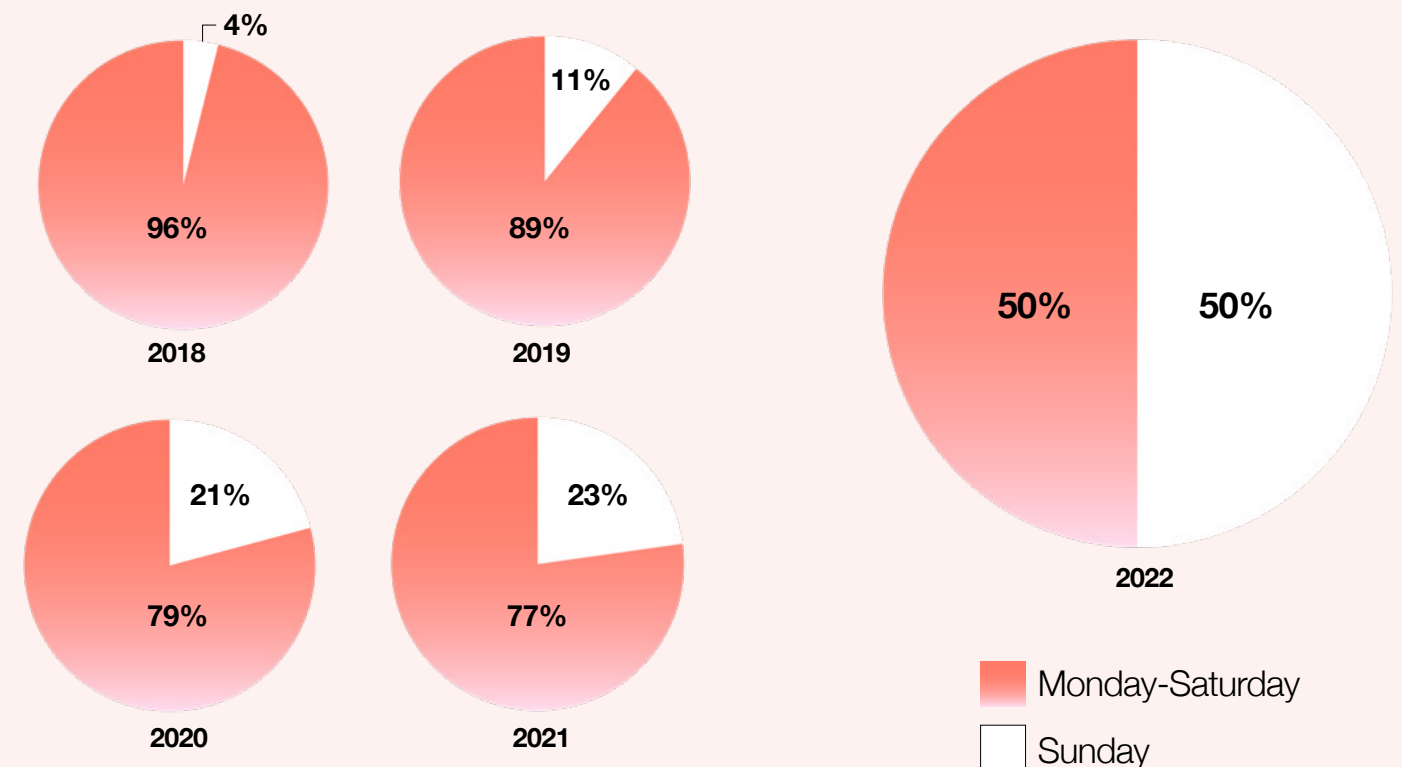


say they are streaming their boxsets or films rather than watching TV live or on DVD. In fact, data traffic carried in our busiest hour on a Sunday now is the same as the total traffic on an average week in 2015 or whole month in 2012.

In the past six months, Sunday streaming was responsible for two of the largest monthly peaks

(24 October 2021 and 23 January 2022) as well as almost a quarter of last year's weekly peaks. This coincides with a significant increase in mobile broadband usage in 202, in which average monthly data usage grew 54% year-on-year. So far in 2022 we're seeing the pattern continue; Sundays have been the peak usage day for 4 of 8 weeks.

Percentage of weeks where Sundays have had the highest data usage:



The old-fashioned phone call



While the pandemic has given rise to new ways of communicating - it has also brought more of a focus on the old-fashioned phone call. During the first lockdown, voice calls peaked at record highs and over the course of 2020, calls averaged 16% longer in length as Brits spent more time chatting to the people that matter most.

Two in five Brits say they prefer calling to texting



The trend has continued throughout 2021 as the number and total minutes of calls both increased. 2022 is set to be the year of the phone call with two in five (39%) now preferring calling to texting and a third (30%) making more audio calls than pre lockdown. In fact, 13 million* Brits say since the pandemic they now feel more comfortable talking on the phone and 53% of adults say they now realise how important it is to speak to loved ones on the phone.

Call volume has reduced since 2019

2019: 18.2bn calls

2021: 17.6bn calls

However the length of time actually increased and was particularly evident during National lockdowns driven by the need for more information and consumers connecting with each other.

Between 2019 and 2020 people made 1.5 billion fewer calls, but were on the phone for 2 billion more minutes.

2021 is changing this, the number and total minutes of calls both increased from 2020. The monthly voice calls peak for Jan 2021 occurred on 4th January as the third lockdown was announced.

25%* of respondents said they feel more comfortable talking on the phone now than pre pandemic. 13 million calculated as 25% of UK adults (53 million).



*Consumer research conducted by Opinium – 2,000 UK adults surveyed between 8-11 March 2022.

*44% of Londoners say they prefer calling to texting, 28% of those in Bristol prefer calling to texting



The 5G future

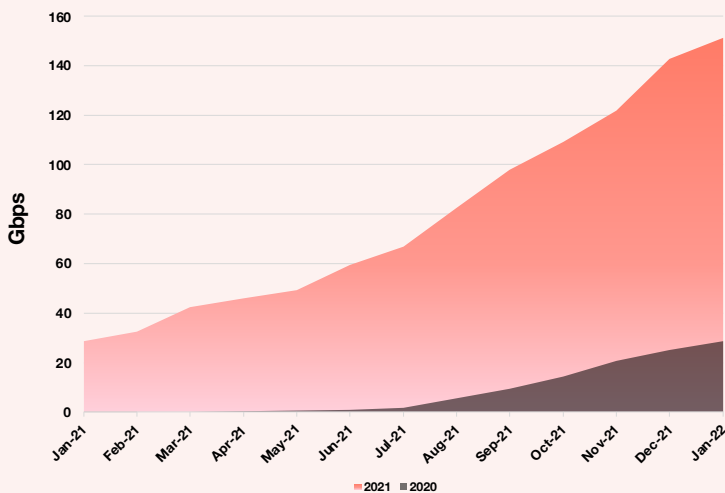
If the last two years have shown us anything it is that good connectivity is essential for the big and the small moments. 5G is the future of connectivity, saving us 23 hours of download time every month.*

Three customers are embracing 5G wholeheartedly with 5G usage now exceeding 3G. The number of 5G devices connecting to Three's network also increased by four times in 2021. But it doesn't stop there. We expect 5G to reach up to 35% of data usage by the end of 2022 as Three continues its rollout.

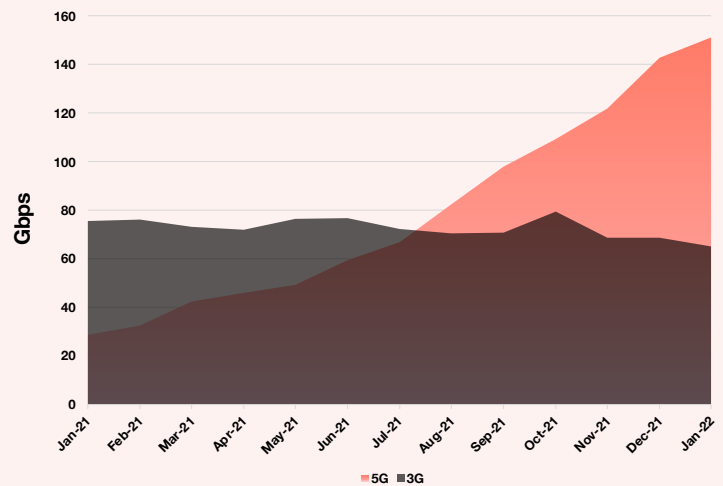
5G

usage increased by 385% from 2020 to 2021 and 5G usage has overtaken 3G.

5G peak throughput 2020 vs 2021



5G vs 3G usage

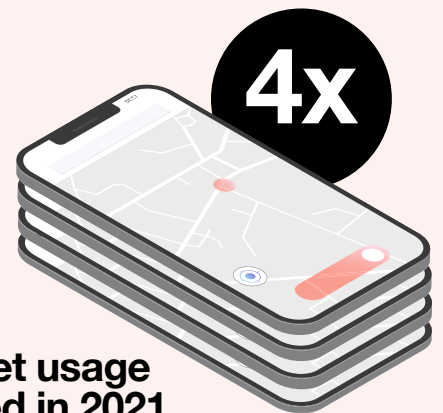


Are you 5G ready?

We estimate 5G will account for around

35%

of data usage by the end of 2022.



5G handset usage quadrupled in 2021

The number of 5G devices connecting to Three's network increased by four times - 299% from Dec 2020 to Dec 2021 to 2.2m devices.



Building a Big Network for the UK

Three is all about connecting people to the things and people they love the most. With our network now covering 99% of the UK population and carrying 28% of the UK's mobile data traffic, we are doing this day in, day out.

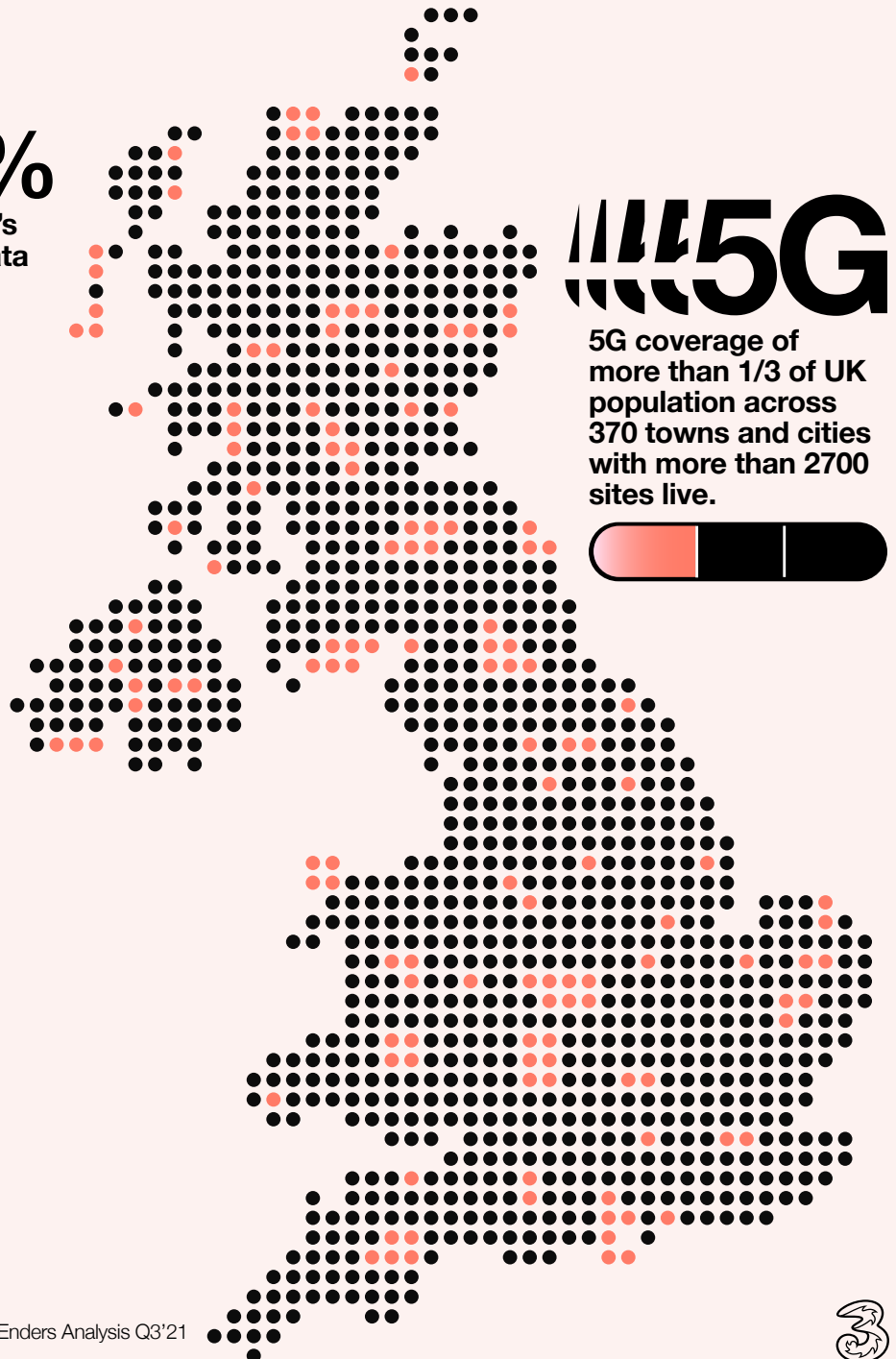


The UK's Fastest 5G Network

We are continually investing in our network to develop this further too. We're investing £2bn+, improving our service levels and increasing 4G speeds by up to 150%. We have also been focused on rolling out 5G and are now live in 370 locations with 2700 sites live. We are not just focused on scale though – it's all about speed. And we have that in abundance, with Ookla naming us the fastest 5G network.



carry **28%** of the UK's mobile data traffic*



speeds up by 150%

4G

