

4 Internet and web-based content

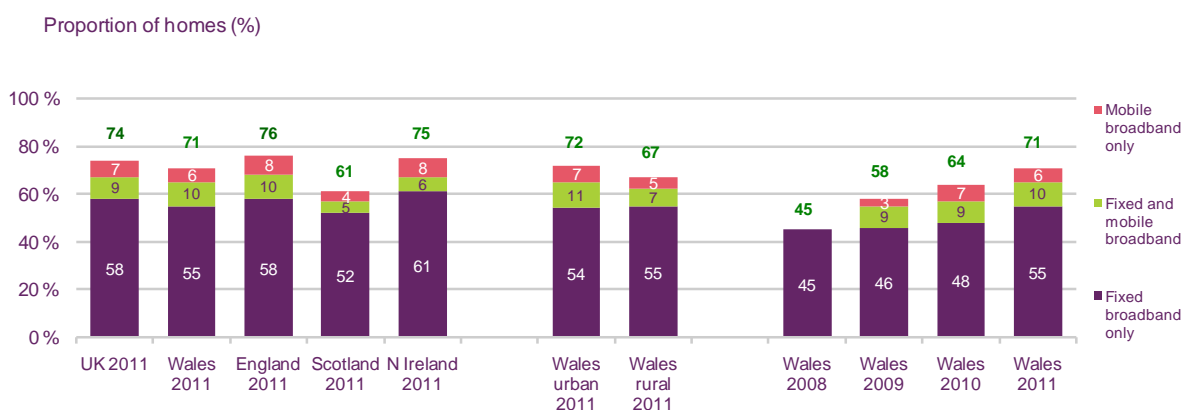
4.1 Broadband take-up

Broadband take-up in Wales increased by seven percentage points

Broadband take-up in Wales has increased by seven percentage points in the past year – the largest year-on-year increase recorded across the UK’s nations. The increase has been driven by an increase in fixed broadband take-up, from 57% to 65%.

Broadband take-up in Wales remains below the UK average, but the gap has closed in the past year. Broadband penetration is higher in Wales’ urban areas (72%) than it is in rural areas (67%). One in ten homes in Wales have both a mobile broadband connection *and* a fixed broadband connection. For more information on broadband take-up by area, see Ofcom’s fixed broadband map: <http://maps.ofcom.org.uk/broadband/>⁵.

Figure 4.1 Broadband take-up at home



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

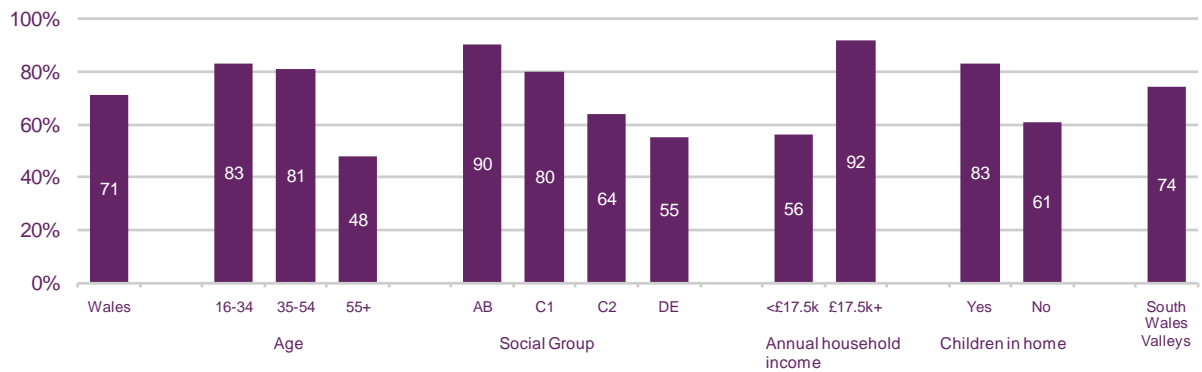
QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Broadband take-up is lowest among over-55s and DE households

Figure 4.2 shows that, as in the rest of the UK, broadband take-up in Wales varies significantly by demographic factors. Take-up in Wales is relatively low among those aged 55+ (48%), DE social groups (55%), and in households with incomes less than £17.5k per annum (56%). In comparison, take-up is high among households with children, where 83% have a broadband connection.

⁵ Note the figures in the broadband map are based on broadband penetration by premises (the number of broadband connections divided by number of postal delivery points). This includes residential and business connections. As a result the figure is not comparable with the survey data in this report.

Figure 4.2 Broadband take-up in Wales (by demographic)



Source: Ofcom research, Q1 2011

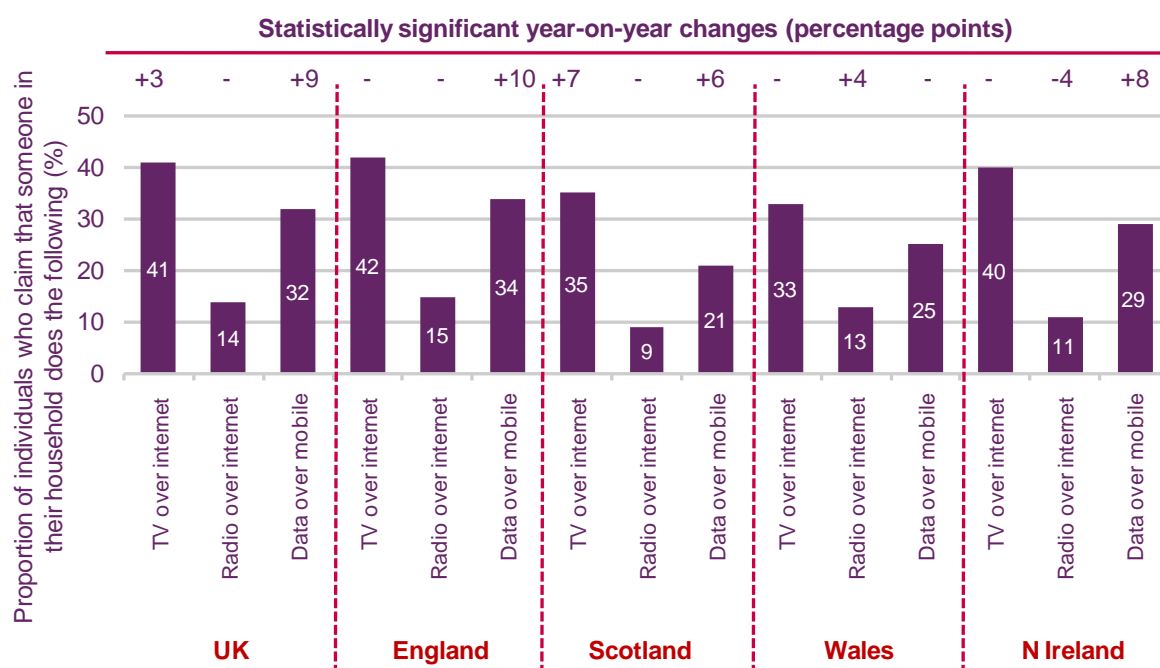
Base: All adults aged 16+ (n =493 Wales, 135 16-34s, 166 35-54s, 192 55+, 98 AB, 148 C1, 108 C2, 139 DE, 187 <£17.5k income, 116 £17.5k+, 169 children in home, 324 no children in home, 72 South Wales Valleys)

QE9. Which of these methods does your household use to connect to the internet at home?

4.2 Internet use

Watching audio-visual content over the internet continues to be a popular pastime, with a third of homes in Wales (33%) watching services such as BBC i-Player, 4oD and ITV Player. Thirteen per cent of homes use the internet to listen to the radio, in line with the UK average (14%), and increasing four percentage points in the past year.

Figure 4.3 Consumers' use of converging platforms



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)

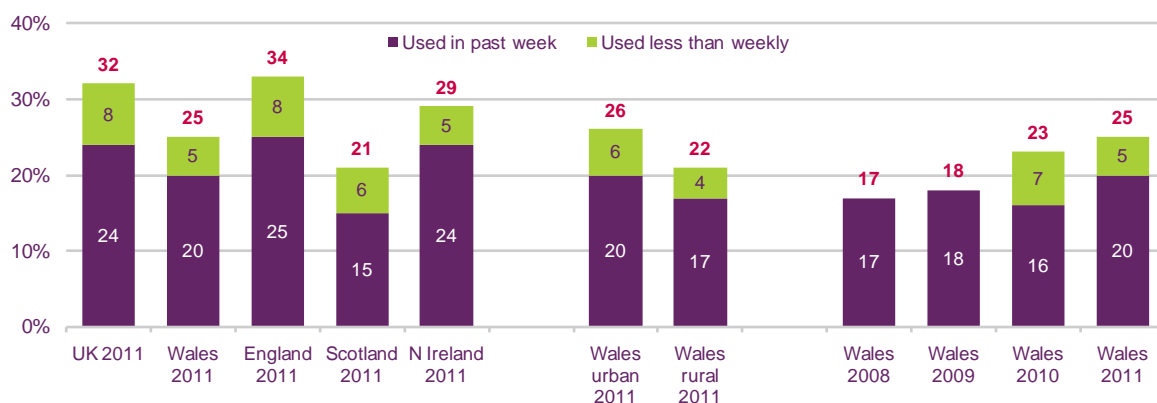
Questions. Which, if any, of these do you or members of your household use the internet for whilst at home?/ Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging

A quarter of adults in Wales use data on mobile handsets

One in four (25%) consumers in Wales say that they use their mobile phone to access data services (internet, emails, web-enabled apps etc.), while one in five (20%) had done so in the past week. In comparison, a third of UK consumers (33%) access data over mobile, an increase of 9% points last year.

The proportion in Wales using a mobile to access the internet is on a par with the proportion of smartphone owners in Wales (29% of mobile phone owners – equating to 25% of all adults), suggesting that smartphone owners are making use of their phone's internet connectivity.

Figure 4.4 Use of mobile phone to access the internet



Source: Ofcom research, Q1 2011

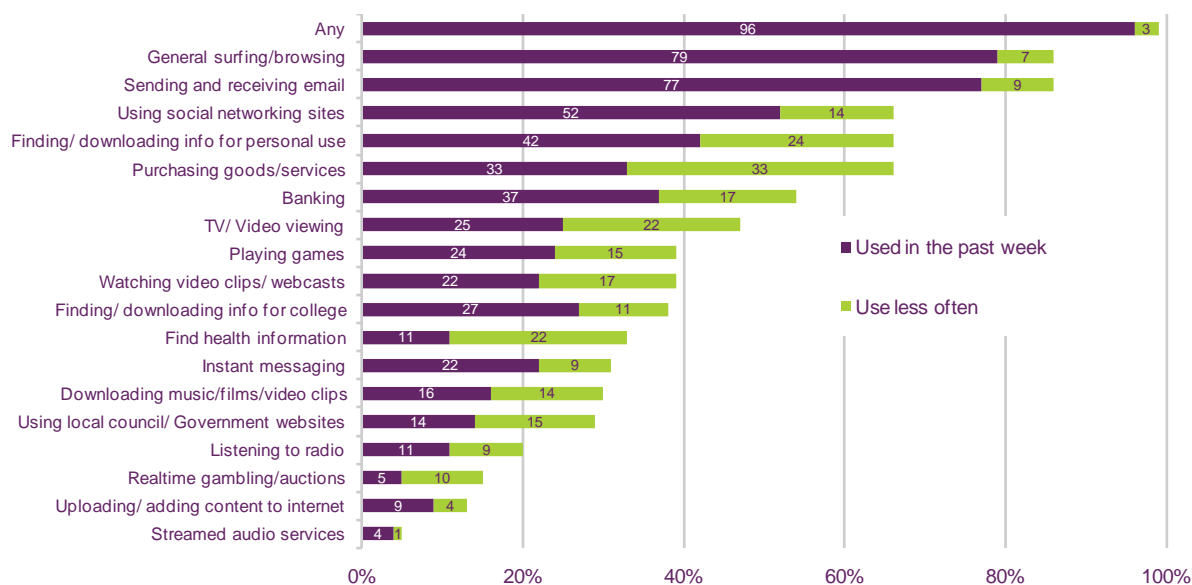
Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Social networking continues to increase in popularity

Those in Wales who have a broadband connection at home make use of their connection for a range of different purposes. One of the most notable changes in the way people use the internet in recent years has been in the use of social networking sites. Two-thirds of those with broadband use a social networking site. Use of social networking websites is second only to 'general surfing/ browsing' and email use.

Figure 4.5 Use of online applications among broadband users



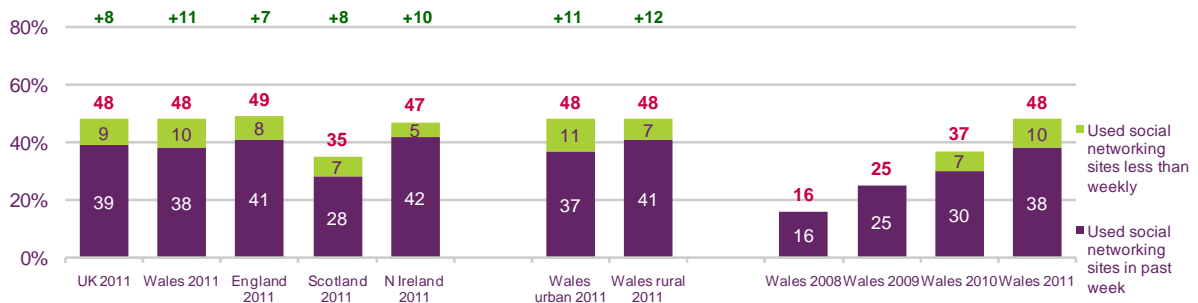
Source: Ofcom research, Q1 2011

Base: Adults aged 16+ with a broadband connection at home (n= 328 Wales 2011)

QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

Forty-eight per cent of adults in Wales use social networking sites, with this proportion being equal in urban and rural areas. This represents an 11 percentage point rise from Q1 2010 – the fastest increase across the UK, bringing social networking in Wales into line with the UK average.

Figure 4.6 Use of social networking sites in Wales



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week?/ QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?