

5 Internet and online content

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5.1 Internet take-up

More than eight in ten households in Wales have access to the internet

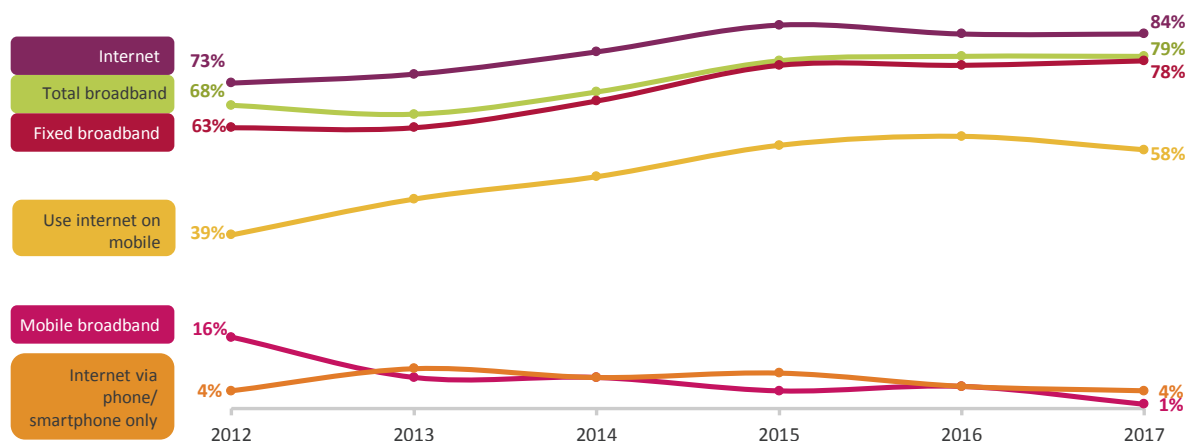
In 2017, more than eight in ten (84%) households in Wales have access to the internet¹, and internet take-up levels in Wales are statistically unchanged since 2016.

Almost eight in ten households in Wales (78%) have access to fixed

broadband at home, and almost six in ten (58%) adults in Wales use the internet through a mobile phone, both figures unchanged since 2016. The proportion of adults in Wales accessing the internet exclusively through a mobile phone or smartphone remains

stable at 4%. However, mobile broadband to a device other than phone (i.e., connecting a device using a USB stick or dongle, or built-in connectivity in a laptop/netbook/tablet with a SIM card) has declined among households in Wales since 2016 (from 5% to 1%).

Figure 5.1: Internet take-up in Wales: 2010-2017



Source: Ofcom Technology Tracker. Data from January-February each year

Significance testing: Arrows indicate any significant differences at the 99% confidence level between Wales 2016 and 2017

Base: All adults aged 16+ (n = 495 Wales 2017)

Note 1: 'Internet' includes access at home via any device, e.g. PC, mobile phone, tablet etc.

Note 2: 'Total broadband' includes the following at home – fixed broadband (via phone line or cable service), mobile broadband (via a USB stick or dongle, or built-in connectivity in a laptop/netbook/tablet with a SIM), tethering (via mobile phone internet connection on laptop/tablet), mobile broadband wireless router (via 3G or 4G mobile network, which can be shared between devices).

Note 3: 'Fixed broadband' includes ADSL, cable and fibre services – perhaps using a Wi-Fi router. This includes superfast broadband services.

Note 4: 'Mobile broadband' is connecting a device using a USB stick or dongle, or built-in connectivity in a laptop or netbook or tablet computer with a SIM card.

Note 5: 'Use internet on mobile' is the proportion of adults who use a mobile phone for any of the following activities: instant messaging, downloading apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

¹ This includes internet access via broadband or mobile phone. Incidences of narrowband are too low to report but would still count as 'internet access'.

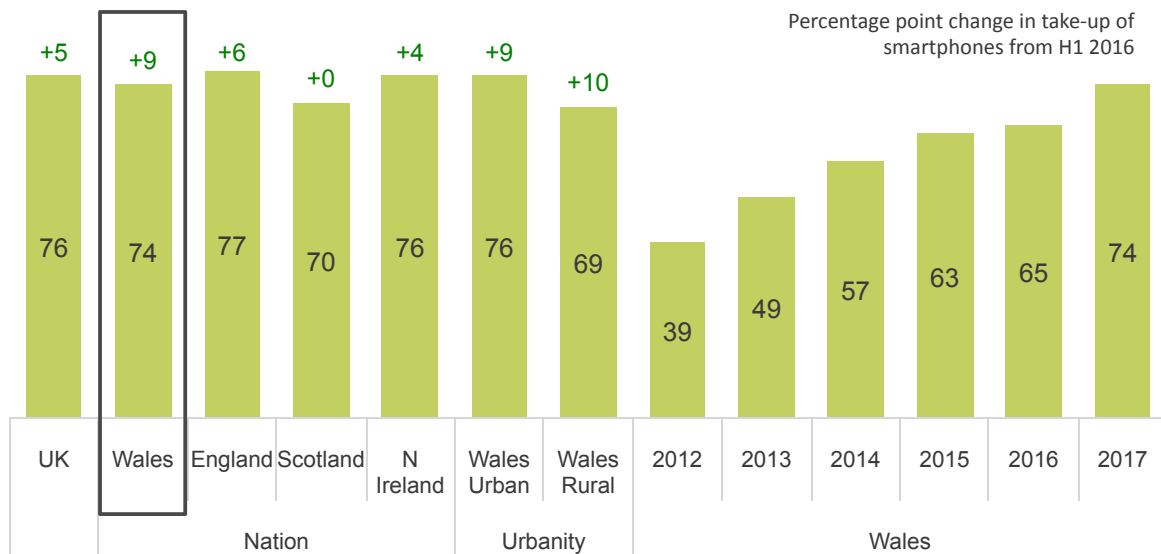
5.2 Internet-enabled devices

Three-quarters of adults in Wales personally use a smartphone, in line with the UK average

In 2017, three-quarters (74%) of adults in Wales personally used a smartphone, which is similar to the UK overall (76%) and not a significant change since 2016.

Smartphone ownership does not vary significantly by urban or rural location in Wales.

Figure 5.2: Take-up of smartphones in Wales



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ (n = 3743 UK, 495 Wales, 2245 England, 510 Scotland, 493 Northern Ireland, 249 Wales urban, 246 Wales rural, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 289 Wales 2016, 495 Wales 2017)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2017, between Wales urban and rural in 2017 and at the 99% confidence level between Wales 2016 and 2017. Circles around the +/- figures above the chart indicate any significant difference at the 99% confidence level between 2016 and 2017 for Wales, urban and rural.

QD24B: Do you personally use a smartphone? A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

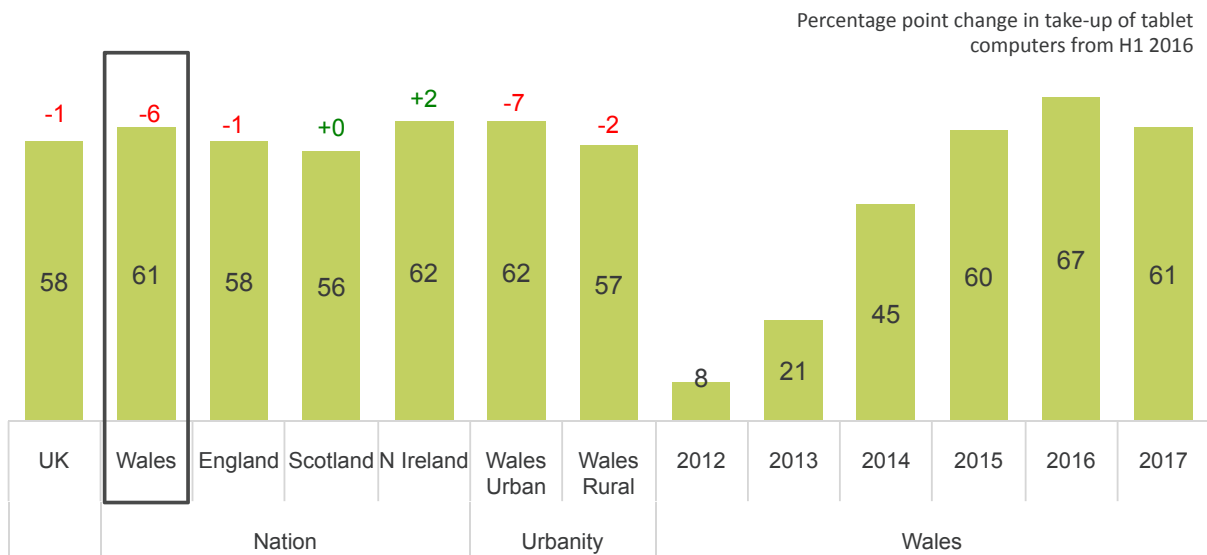
Six in ten households in Wales own a tablet, in line with the UK average

In both 2015 and in 2016, households in Wales were more likely than households across the UK as a whole to own a tablet computer.

In 2017, however, this difference was not evident, as six in ten (61%) households in Wales owned a tablet computer, in line with the UK average (58%).

Tablet ownership does not vary significantly by urban or rural location in Wales.

Figure 5.3: Take-up of tablet computers in Wales



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ (n = 3743 UK, 495 Wales, 2245 England, 510 Scotland, 493 Northern Ireland, 249 Wales urban, 246 Wales rural, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 289 Wales 2016, 495 Wales 2017)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2017, between Wales urban and rural in 2017 and at the 99% confidence level between Wales 2016 and 2017. Circles around the +/- figures above the chart indicate any significant difference at the 99% confidence level between 2016 and 2017 for Wales, urban and rural.

QE1: Does your household have a PC, laptop, netbook or tablet computer?

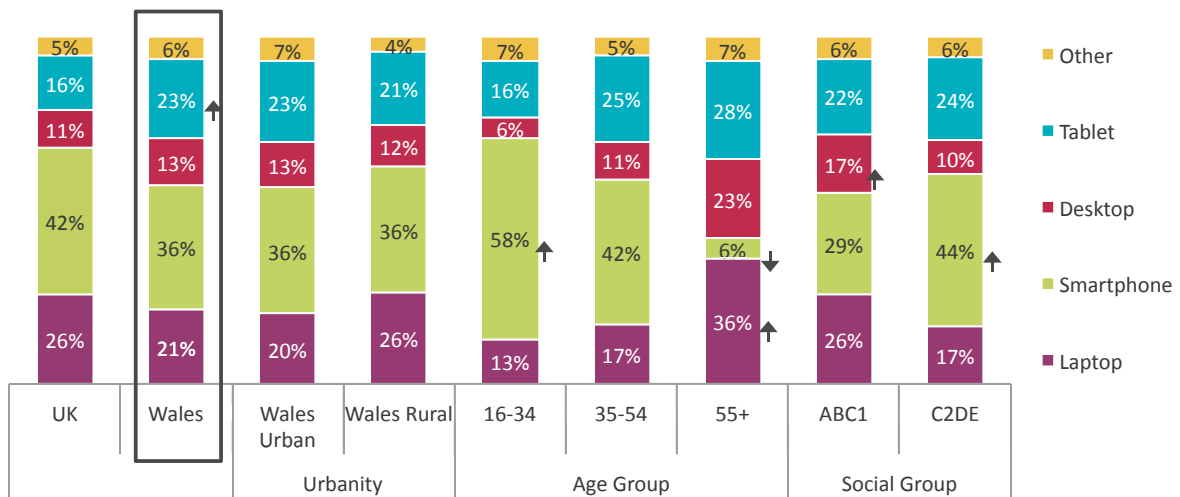
Internet users in Wales say a smartphone is their most important device for going online

In 2017 more than a third of internet users¹ in Wales (36%), said that their smartphone was their most important device for going online, at home or elsewhere. This matches attitudes for the UK overall. With the exception of internet users aged 55 and over, more people considered the smartphone to be

their most important device for internet access than any other device; for example, 58% of 16-34s compared to 6% of over-55s. Three in ten (29%) ABC1s considered the smartphone to be their most important device; this rose to more than four in ten (44%) of internet users in C2DE households.

However, internet users in Wales were more likely than the UK overall to say that a tablet was their most important device for going online (23% vs. 16%). This is despite comparable levels of tablet ownership in Wales and in the UK overall.

Figure 5.4: Most important device for accessing the internet in Wales



Source: Ofcom Technology Tracker, half 1 2017

Base: Internet users aged 16+ (n = 3221 UK, 421 Wales, 220 Wales urban, 201 Wales rural, 129 16-34, 138 35-54, 154 55+, 234 ABC1, 187 C2DE).

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2017 and between Wales urban and rural in 2017, by age compared to all internet users in Wales in 2017 and between socio-economic groups in Wales in 2017.

QE40: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "netbook", "e-reader", "TV set", "games console", "other portable/handheld device", "smartwatch", "other device", "none" and "don't know".

¹ Internet users are defined as those who ever go online, either at home or elsewhere.

5.3 Internet use

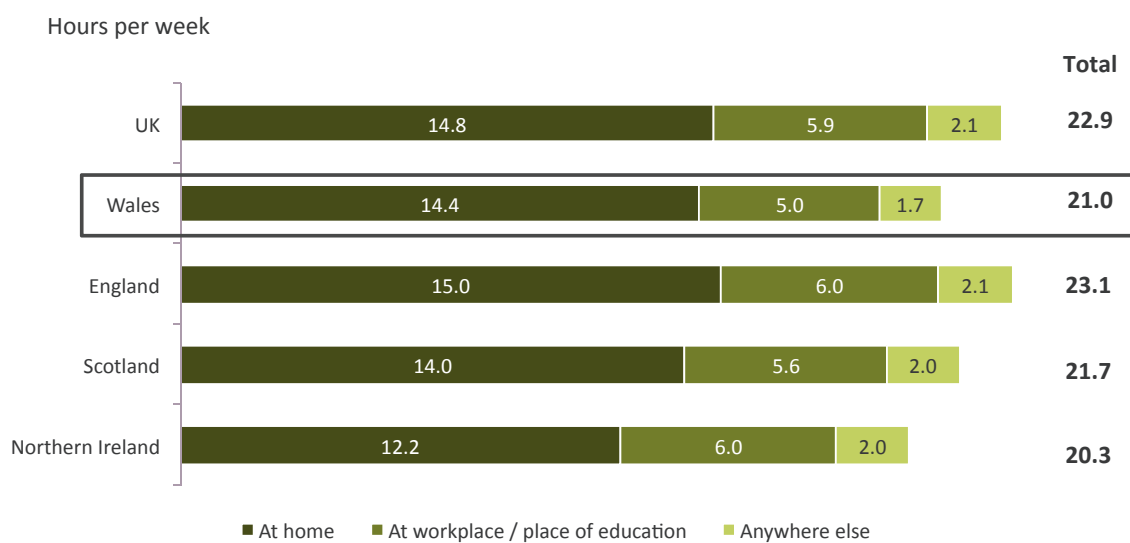
Internet users in Wales spent an average of 21 hours online per week in 2016

According to research conducted for Ofcom’s *Adults’ Media Use and Attitudes Report 2016*,¹ internet users in Wales claimed to spend an

average of 21 hours online per week in 2016- the majority of which was spent online at home (14.4 hours). Time spent online in each location

(at home, in their workplace or place of education or anywhere else), was in line with the UK as a whole.

Figure 5.5 : Claimed time spent on the internet in a typical week: 2016



Source: Ofcom Media Literacy Tracker 2016

Base: All adults aged 16+ who go online at home or elsewhere (1553 UK, 189 Wales, 999 England, 176 Scotland, 189 Northern Ireland).

IN5A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

¹ Available online at <https://www.ofcom.org.uk/research-and-data/media-literacy-research/adults>

General surfing/browsing and sending/receiving email remain the most popular activities among internet users in Wales in 2017

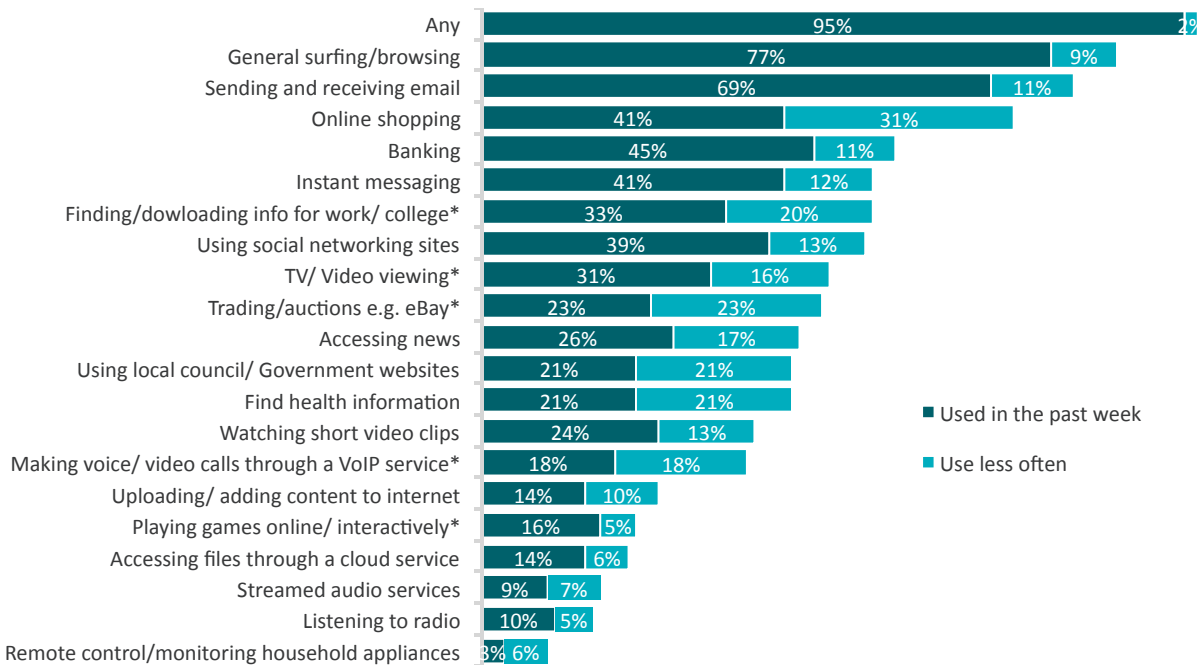
The most popular internet activities among adults in Wales in 2017 were general surfing/ browsing (86%) and sending/ receiving email (80%). These were also reported as being the most used in the past week.¹ Online shopping was the

next most popular activity (72%) followed by using the internet for banking (56%). More than half of internet users in Wales go online to do instant messaging (53%), to source or download information for their work or education (53%),

or for social networking (52%).

Where it was possible to make comparisons², no internet activities were more likely or less likely to be carried out online, compared to 2016.

Figure 5.6: Activities carried out online by internet users in Wales



Source: Ofcom Technology Tracker, Half 1 2017

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 421 Wales 2017)

Significance testing: Arrows (or lack of) indicate any significant difference at the 99% confidence level in the total incidence of use between Wales 2016 and 2017. *Codes marked with an asterisk have not been tested as they are not directly comparable.

QE5A: Which, if any, of these do you use the internet for?

¹ 'The past week' was that at the time of respondents' interviews

² Activities marked with an asterisk in Figure 5.6 are not directly comparable