

# 5 Internet and web-based content

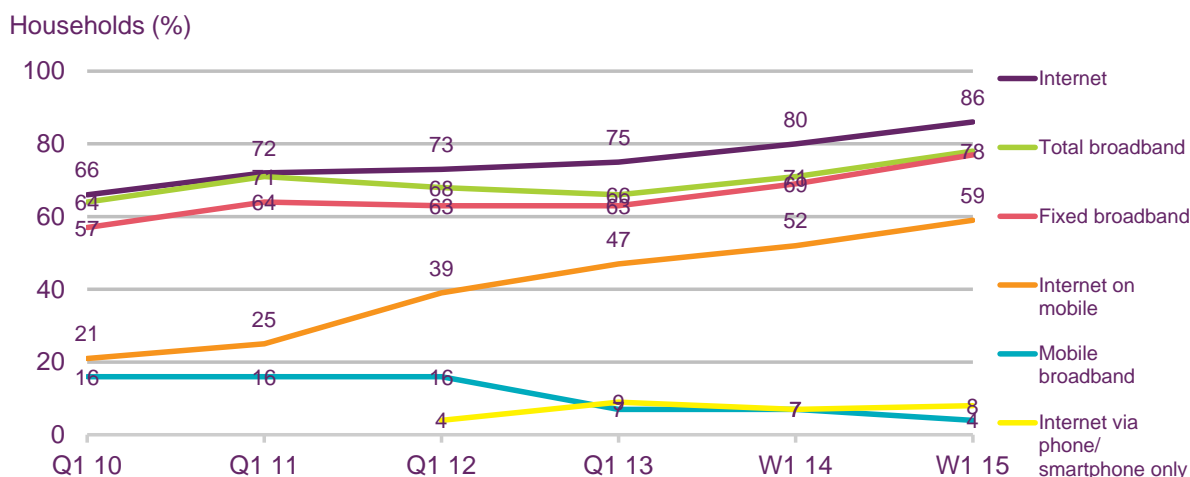
## 5.1 Internet take-up

### Nearly nine in ten households in Wales have access to the internet

In 2015, 17 out of 20 households in Wales (86%) had access to the internet via a broadband connection, a mobile phone or narrowband access (dial-up). This figure has increased by six percentage points (pp) since 2014, when it was 80%.

Three in four households in Wales (77%) have access to fixed broadband at home, an increase since 2014 (69%). Six in ten (59%) adults in Wales have online access through a mobile phone, unchanged since 2014. The proportion of adults in Wales accessing the internet *exclusively* through a mobile phone or smartphone remains stable at 8%; this figure is unchanged since 2013. Throughout this chapter, we note differences that are statistically significant. Not all differences between reported figures (in particular when those differences are small) reflect statistically significant changes in take-up or use of devices or services.

**Figure 5.1 Internet take-up in Wales: 2010-2015**



Source: Ofcom Technology Tracker. Data from Q1 of each year 2010-2013, then Wave 1 2014-2015  
 Base: All adults aged 16+ (n = 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015).

Note 1: 'Internet' includes access to the Internet/Worldwide Web at HOME (via any device, e.g. PC, mobile phone, tablet etc).

Note 2: 'Total broadband' includes the following methods to connect to the internet 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), and 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 would include 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: '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.

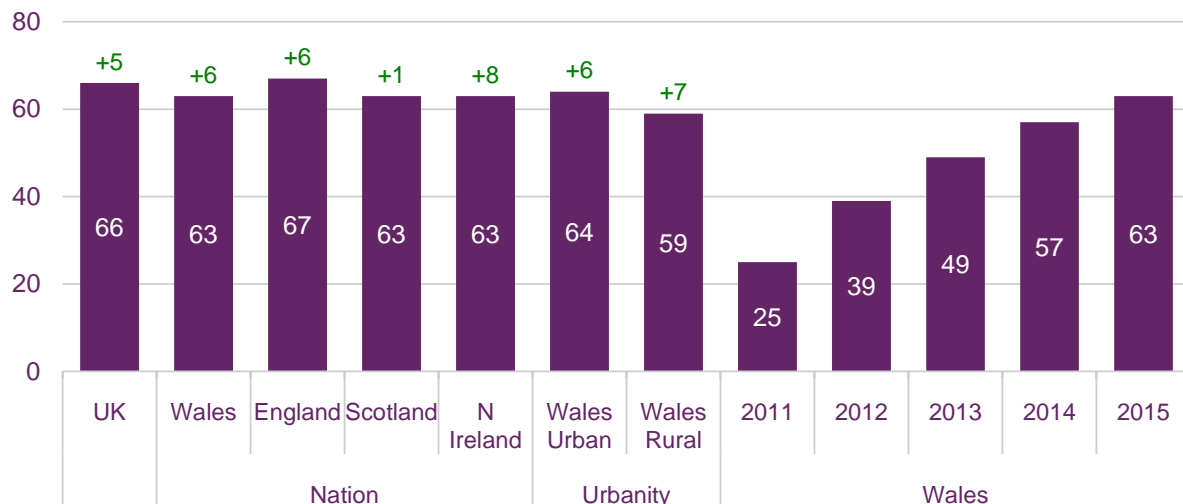
## 5.2 Internet-enabled devices

### The level of smartphone ownership in Wales is in line with the UK as a whole

Smartphone ownership in Wales is not significantly different to 2014, with more than six in ten adults owning one (63%). The incidence of smartphone ownership among adults in Wales is not significantly different to the UK average (66%), and ownership does not vary by urban or rural location in Wales.

**Figure 5.2 Take-up of smartphones in Wales**

Adults 16+ (%) / percentage point change in take-up of smartphones from W1 2014



Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

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.

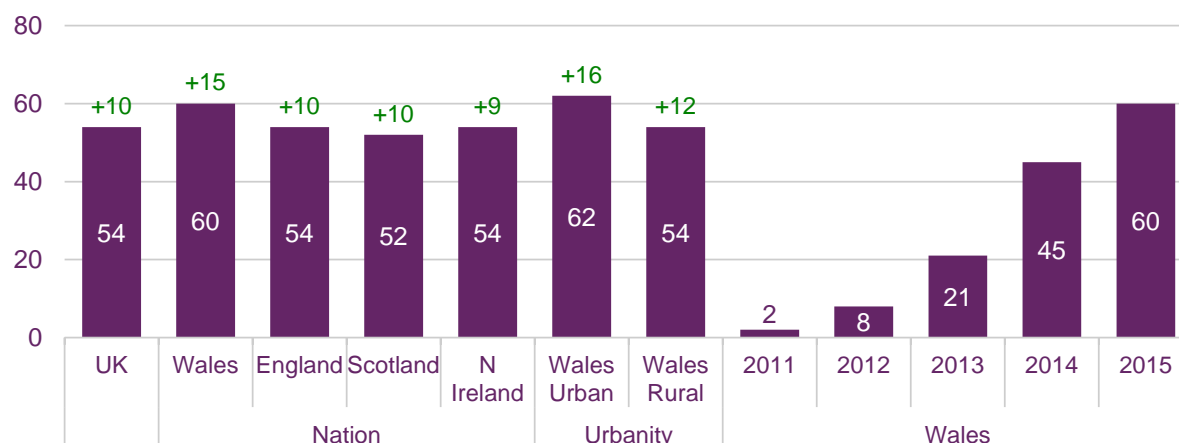
### Tablet ownership continues to grow in Wales, outstripping growth across the UK as a whole

Tablet ownership has continued to increase among adults in Wales and in the UK overall, although growth in the take-up of tablets slowed between 2014 and 2015, compared to the previous year. A majority of adults in Wales say they have a tablet computer in the household (60%), compared to less than half (45%) last year. The 15 pp increase in ownership levels since 2014 means that adults in Wales in 2015 are more likely than adults across the UK as a whole (54%) to own a tablet computer.

While adults in urban areas of Wales are statistically no more likely than those in rural areas to own a tablet (62% vs. 54%), the figure for those in urban areas has increased more than for those in rural areas over the past year (16pp increase in urban areas compared to 12pp in rural areas).

**Figure 5.3 Take-up of tablet computers in Wales**

Households (%) / percentage point change in take-up of tablet computers from W1 2014



Source: Ofcom research, Q1 2014

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

Base: All adults aged 16+ (n = 3740 UK, 491 Wales, 2249 England, 501 Scotland, 499 Northern Ireland, 252 Wales urban, 239 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014)

### Internet users in Wales are more likely to say that a laptop is their most important device for going online

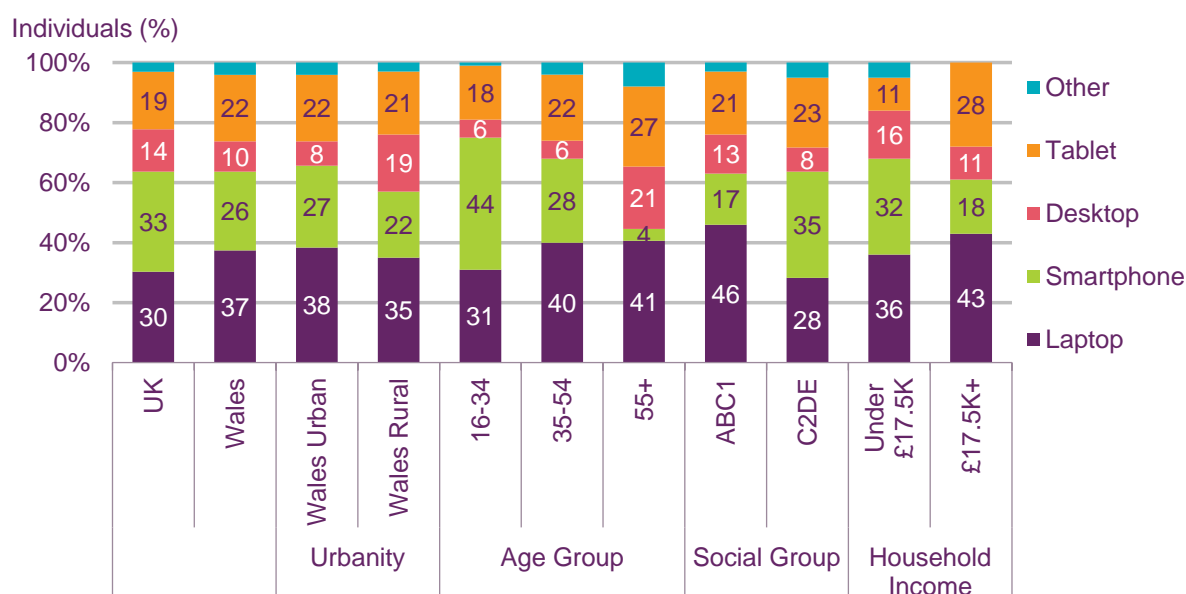
Internet users in Wales cite the laptop as their most important device for going online (37% compared to 30% for the UK) and are less likely to say that a smartphone (26% vs. 33%) or a desktop computer (10% vs. 14%) is their most important device.

The laptop remained the preferred device in both urban and rural Wales. The smartphone, however, is the most important device for 44% of 16-34s, whereas those aged 55 and over are more likely than younger users to say that a desktop computer is their most important device for going online (21%).

Internet users in the C2DE socio-economic groups are twice as likely as those in the ABC1 groups to say that their most important device for accessing the internet is a smartphone (35% vs. 17%). Nearly half of those in the ABC1 groups cite a laptop, compared to three in ten members in the C2DE groups (46% vs. 28%).

One in three internet users with a household income of under £17,500 (32%) say their smartphone is their most important device for accessing the internet, compared to around one in five of those with a household income above £17,500 (18%). In contrast, people in this higher-income group are more than twice as likely to say that their tablet is the most important device (28% vs. 11%).

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



QE40. Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “other device”, “none” and “don’t know”.

Source: Ofcom Technology Tracker, wave 1 2015

Base: Internet users aged 16+ (n = 3095 UK, 413 Wales, 204 Wales urban, 209 Wales rural, 123 16-34, 147 35-54, 143 55+, 232 ABC1, 181 C2DE, 121 under £17.5K, 112 £17.5K+).

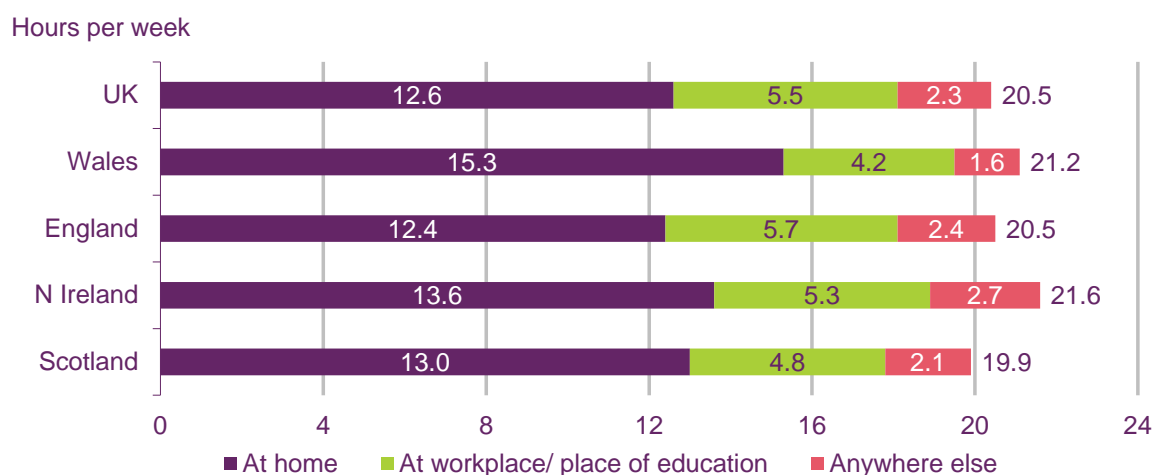
### 5.3 Internet use

#### Internet users in Wales claim to spend significantly more time online at home than the UK average

According to research conducted for Ofcom’s *Adult Media Literacy Report*<sup>37</sup>, internet users in Wales claim to spend an average of 21.2 hours online per week. Of this, they spend 15.3 hours going online at home. Time spent online at home is significantly higher than in England, Scotland, and the UK as a whole. As elsewhere in the UK, internet users in Wales said they spent the majority of time online at home, followed by their workplace or place of education.

<sup>37</sup> Available from online at <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/>

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



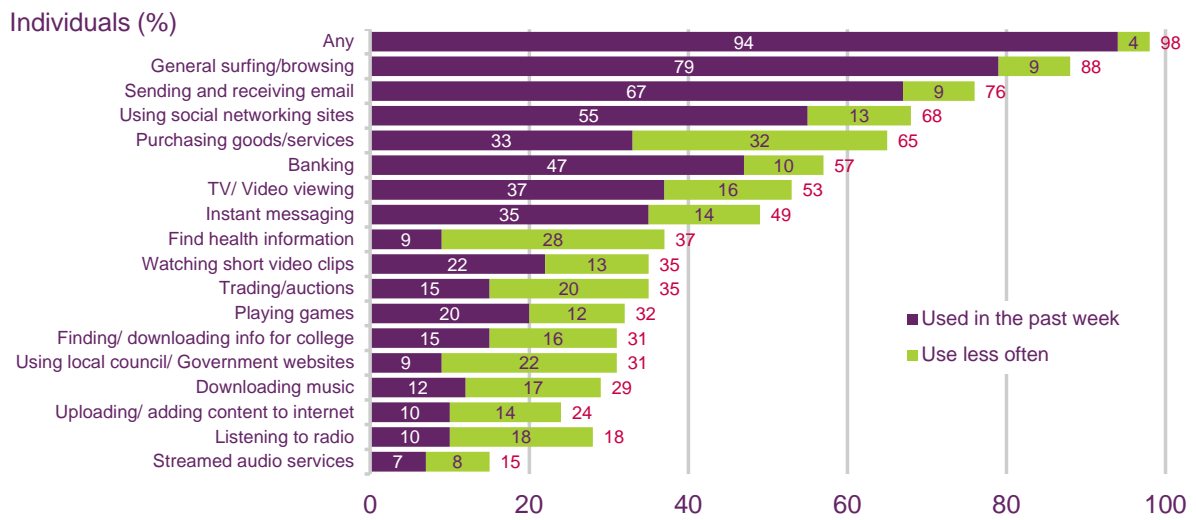
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014  
 Question: IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)  
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland).

**More than half of all internet users in Wales use social networking sites on a weekly basis**

Six activities are undertaken by a majority of internet users in Wales: general surfing or browsing (88%), sending and receiving email (76%), using social networking sites (68%), purchasing goods or services (65%), banking (57%) and TV/ video viewing (53%). The first three of these activities had been undertaken in the previous week by a majority of internet users in Wales – 55% of internet users in Wales said they had used social networking websites in the previous week.

Among the six activities undertaken by a majority of internet users in Wales, compared to 2014, internet users in Wales are now less likely to say they send/ receive email (76% vs. 84% in 2014), although the proportion of people who had used email in the previous week is unchanged.

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



Source: QE5. Which, if any, of these do you use the internet for?

Source: Ofcom Technology Tracker, wave 1 2015

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 413 Wales 2015)