

Wales – The Communications Market Report 2016

Chart Pack

Wales' communications market

1. Market in Context

Key facts about Wales

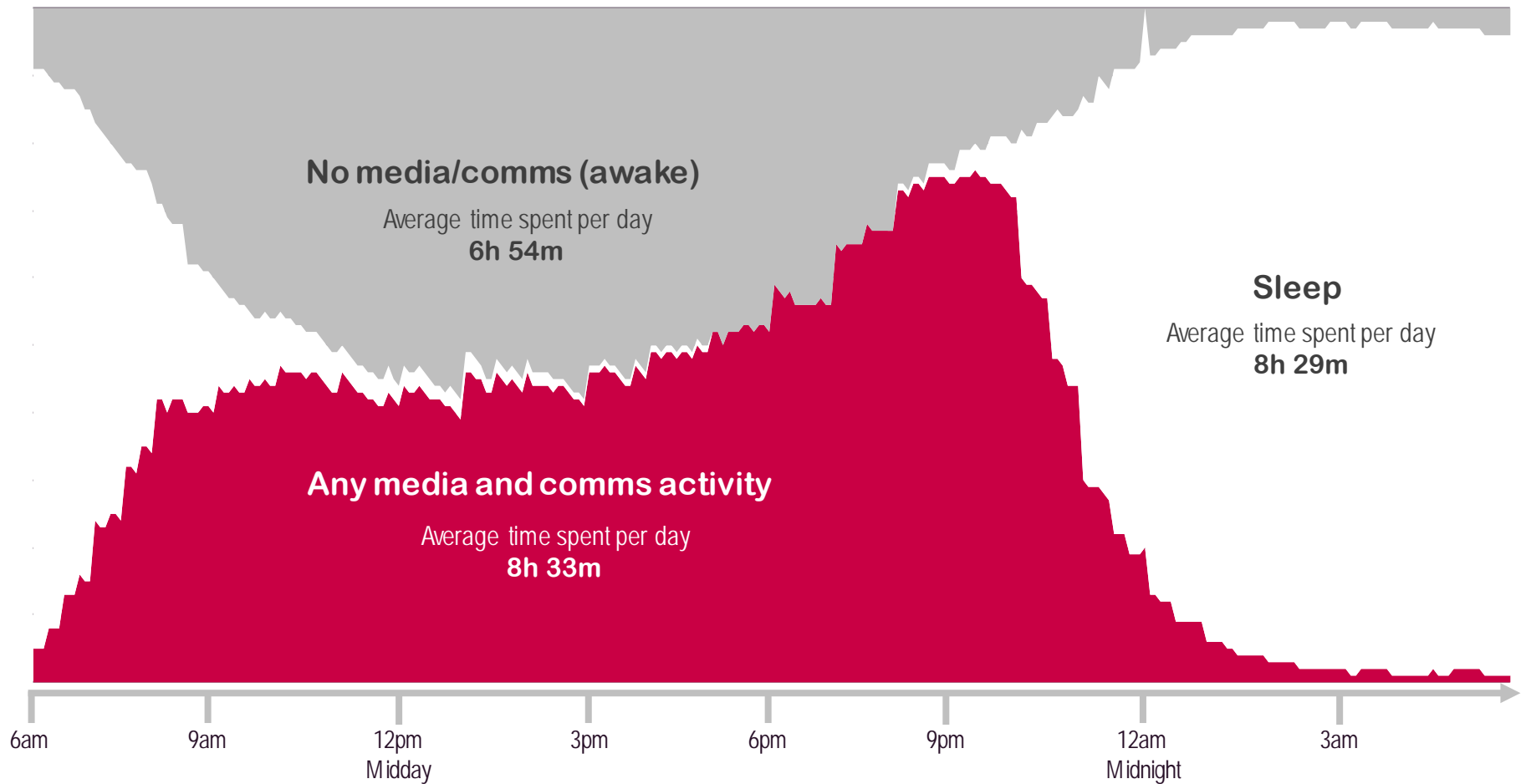
Figure	Wales	UK
Population	3.099 million (mid-2015 estimate)	65.11 million (mid-2015 estimate)
Age profile	Population aged <16: 17.9% Population aged 65+: 20.2%	Population aged <16: 18.8% Population aged 65+: 17.8%
Population density	149.5 people per square kilometre	269 people per square kilometre
Language	24% of the population can speak Welsh	n/a
Unemployment	6.7% of economically active population, aged 16 and over	5.1% of economically active population, aged 16 and over
Income and expenditure	Weekly household income: £661 Weekly household expenditure: £445	Weekly household income: £747 Weekly household expenditure: £531.3

Source: Office for National Statistics: Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2015; Office for National Statistics: Regional Labour Market, June 2016; Office for National Statistics: Family Spending 2015 edition; Annual labour market summary (16 or over) by Welsh local area and economic activity status June 2016; Welsh Language Use Survey 2013-15

Digital Day

Figure 1.2

Media and comms versus non-media and comms activity, by time of day Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 6: D13 for main chart data, and Data book 1: B4 for average time spent per day

Adult diary: Chart shows the proportion of activity attributed to media & comms activity (D), sleep (C) and non-media & comms for each time slot across a week.

Base: Adults aged 16+ in Wales (176)

Figure 1.3

Average daily media and comms time, by nation



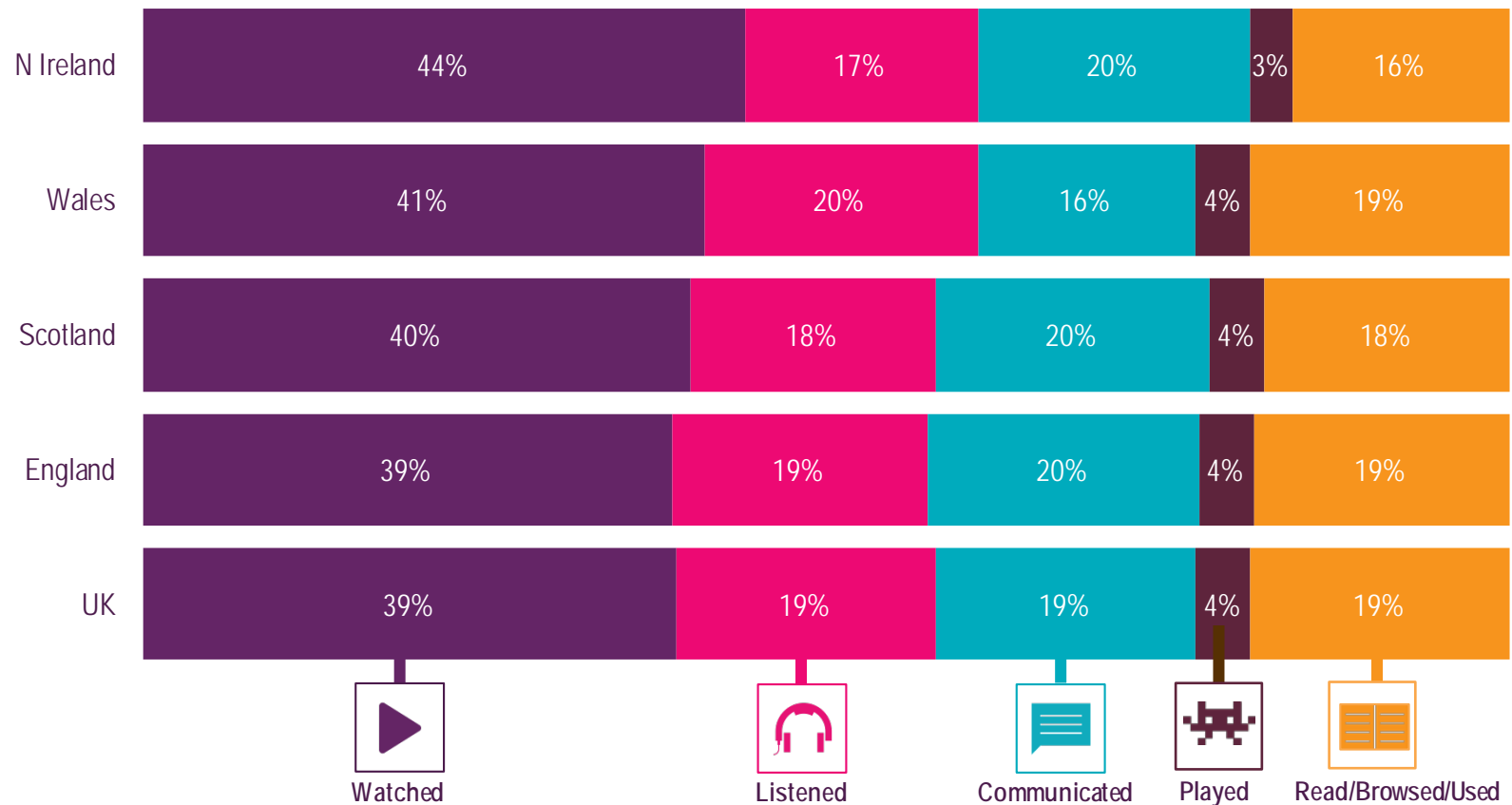
Source: Ofcom Digital Day 2016, Data book 1: B4(2)

*The total average (inc. simultaneous activity) is calculated by summing together the duration (B2) for each activity, dividing by the weighted base of respondents, and then by 7 days. The actual average net time spent (equivalent to solus) is then deducted in order to gauge simultaneous activity time. i.e. time spent doing more than one activity at the same time.

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Figure 1.4

Proportion of media and comms time attributed to activity types, by nation



Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

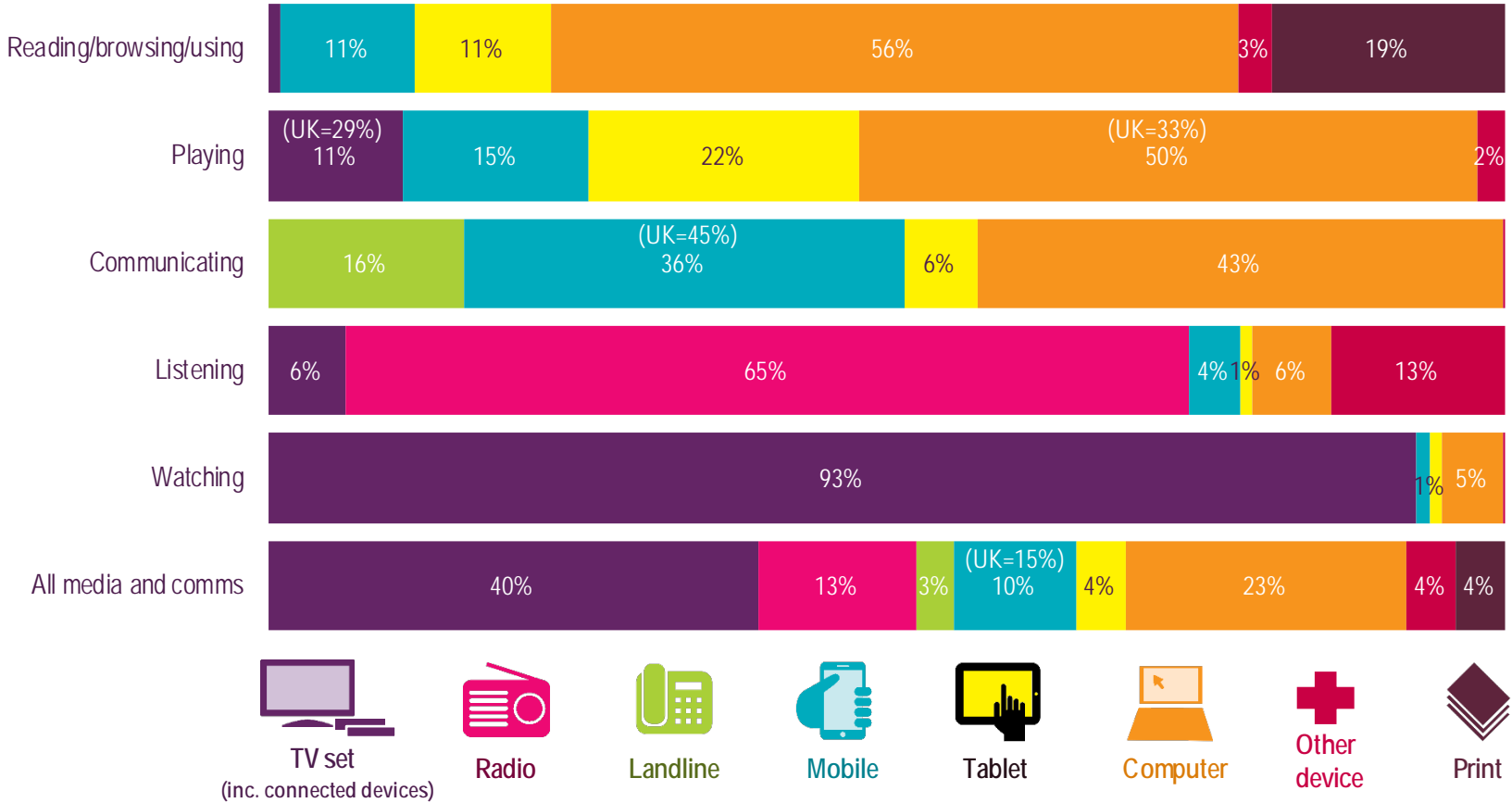
Adult diary: Chart shows the proportion of all media and comms time (B2) attributed to each activity type by nation

*The average weekly minutes figure is among those who did any media and comms activity across their diary week and also includes simultaneous activity

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Figure 1.5

Proportion of time spent on activity types attributed to devices Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016 , Data book 3: C29 for main chart data and Data book 1: B1 for average weekly minutes

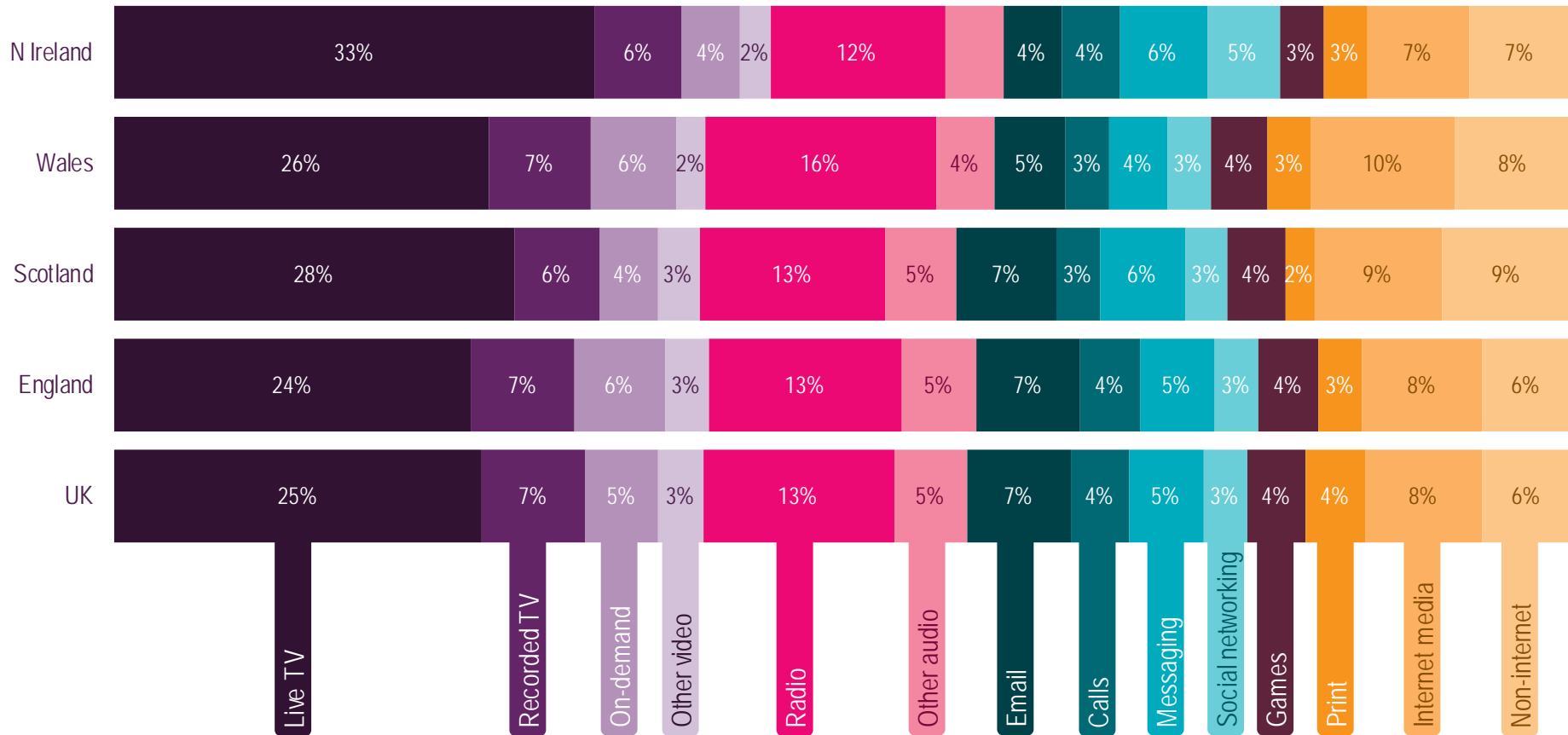
Adult diary: Chart shows the proportion of all time spent on activity types (B2) attributed to each device

*The average daily minutes figure is among those who did each type of activity at all across their diary week, and also includes simultaneous activity

Base: Adults aged 16+ in Wales (176)

Figure 1.6

Proportion of media and comms time attributed to activities, by nation



Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

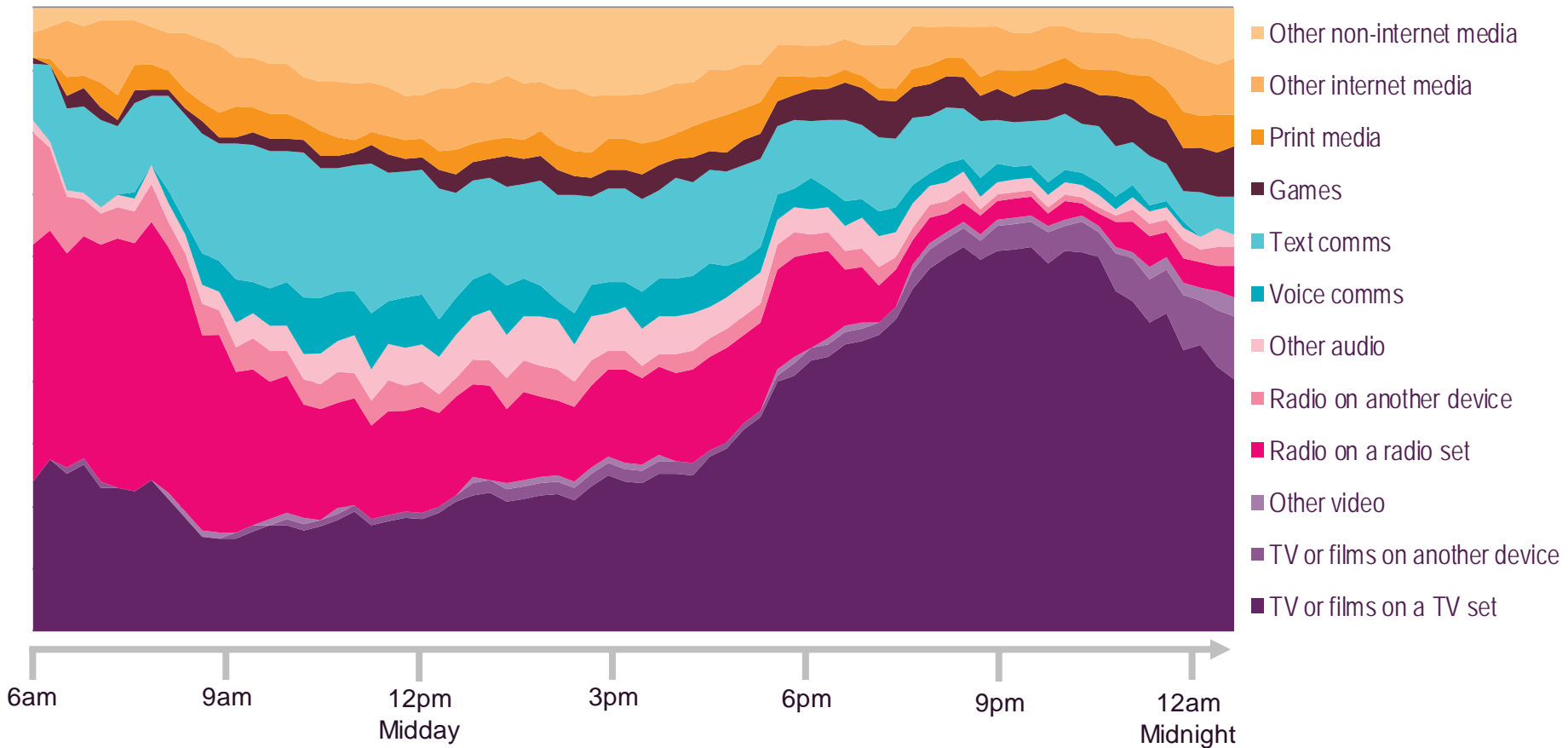
Adult diary: Chart shows the proportion of all media and comms time (B2) attributed to activities by age group.

Note: Messaging includes texts (SMS), Instant Messaging (IMS) and Photo/video messaging (MMS). Calls includes both phone calls and video calls (VoIP)

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Figure 1.7

Proportion of media and comms attributed to grouped activities, by time of day Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 6: B13

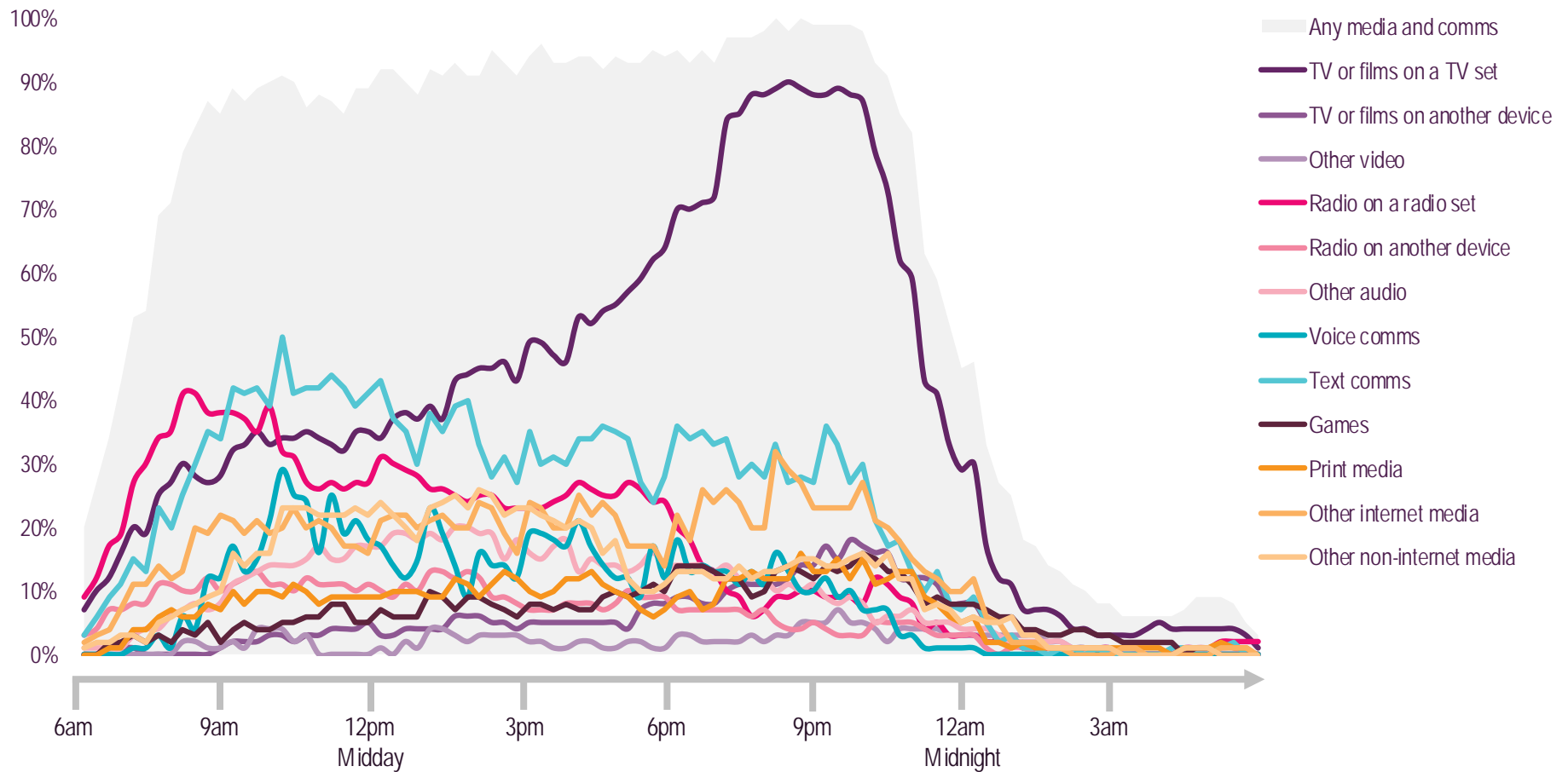
Adult diary: Chart shows the proportion of all media and comms activity attributed to each grouped activity for each time slot across a week.

Note: the base of media and comms activity varies by time, and so relatively low activity during late night time periods should be treated with caution

Base: Adults aged 16+ in Wales (176)

Figure 1.8

Weekly reach of grouped activities, by time of day Among adults 16+ in Wales



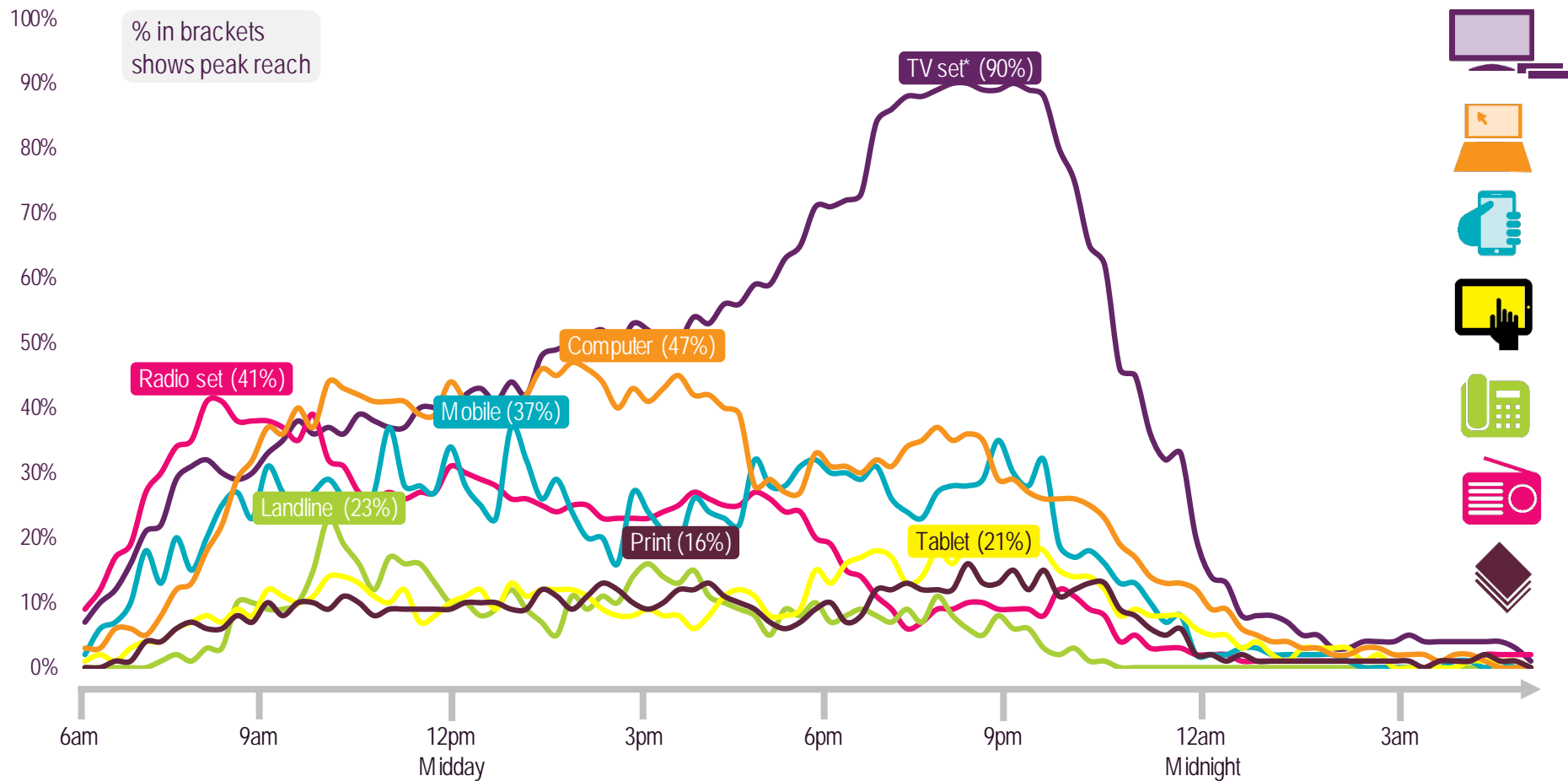
Source: Ofcom Digital Day 2016, Data book 6: A13

Adult diary: Chart shows the proportion of adults who recorded each grouped activity (D) at each time slot across a week.

Base: Adults aged 16+ in Wales (176)

Figure 1.9

Weekly reach of devices, by time of day Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 7: A13

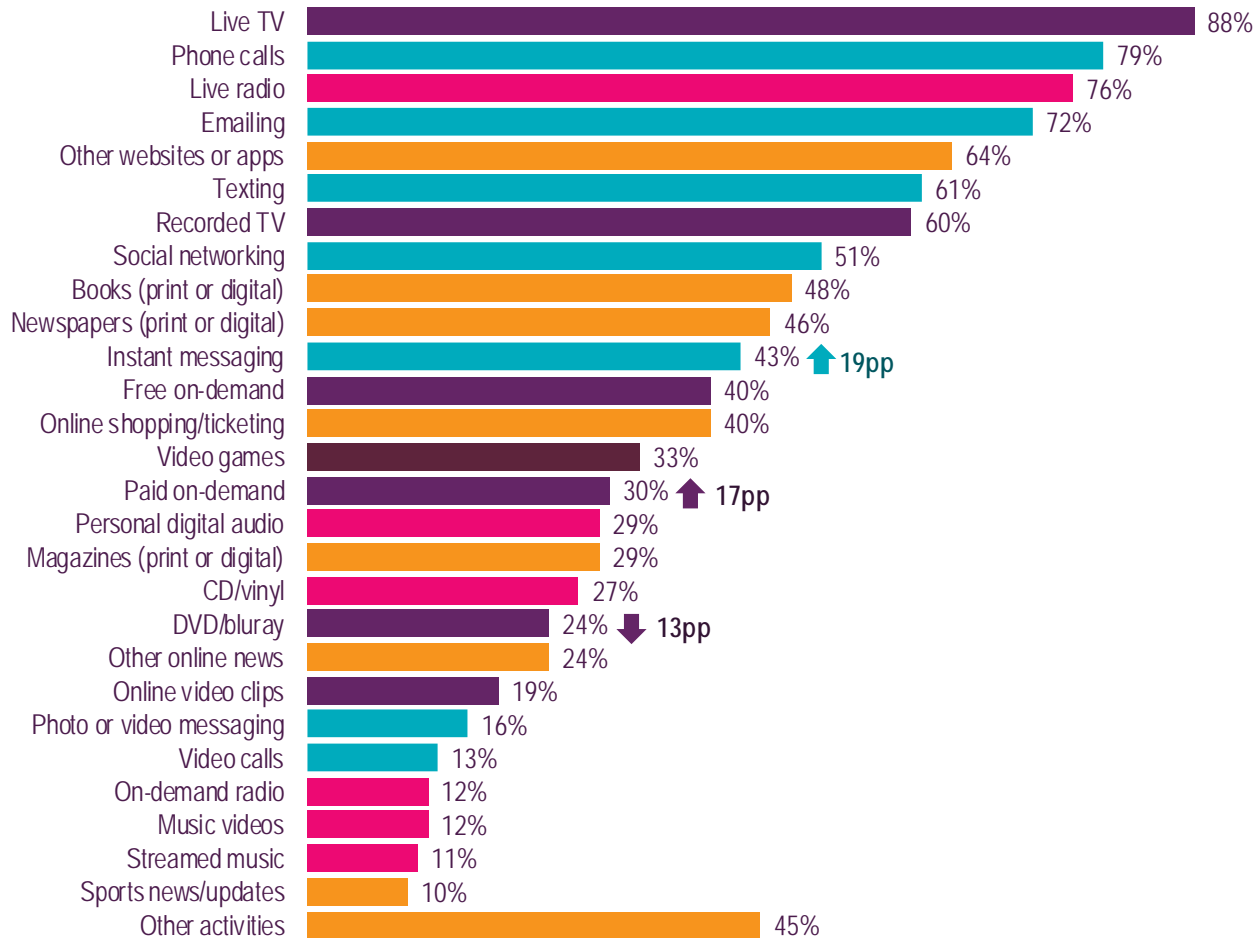
Adult diary: Chart shows the proportion of adults who recorded using each device (E) at each time slot across a week.


* TV set includes all connected devices (games consoles, set top boxes, DVD/Blu-ray player and streaming media players)

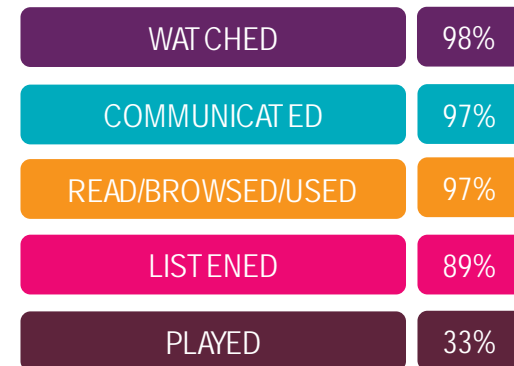
Base: Adults aged 16+ in Wales (176)

Figure 1.10

Weekly reach of media and comms activities Among adults 16+ in Wales




 Arrows indicate
 significant changes since
 2014 (99% level)



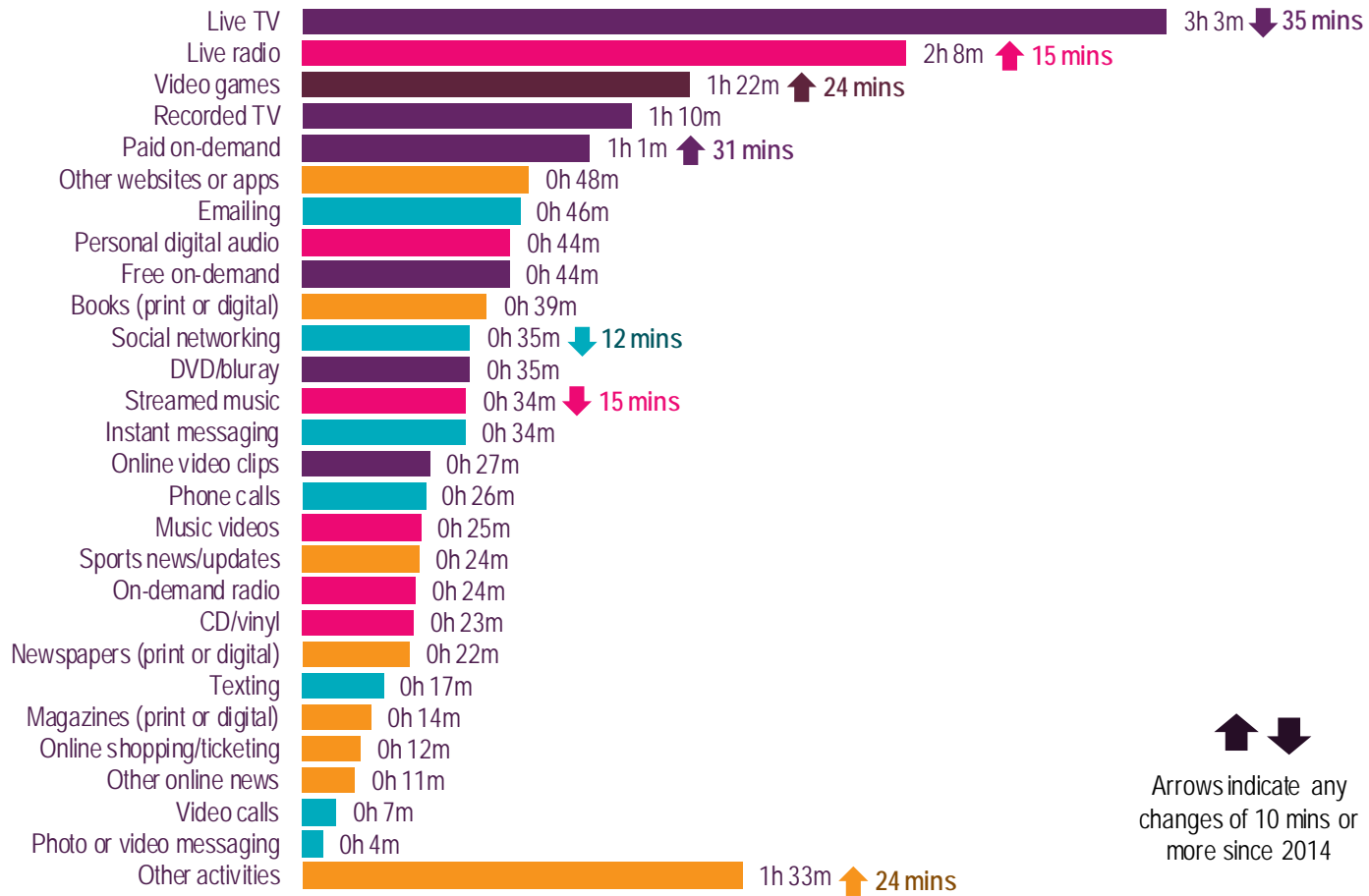
Source: Ofcom Digital Day 2016, Data book 1: A1

Adult diary: Chart shows the proportion of adults who recorded each activity (D) at any point across their diary week.

Base: Adults aged 16+ in Wales (176)

Figure 1.11

Average time spent on activities per day - Wales Among those who did activity at all over a week



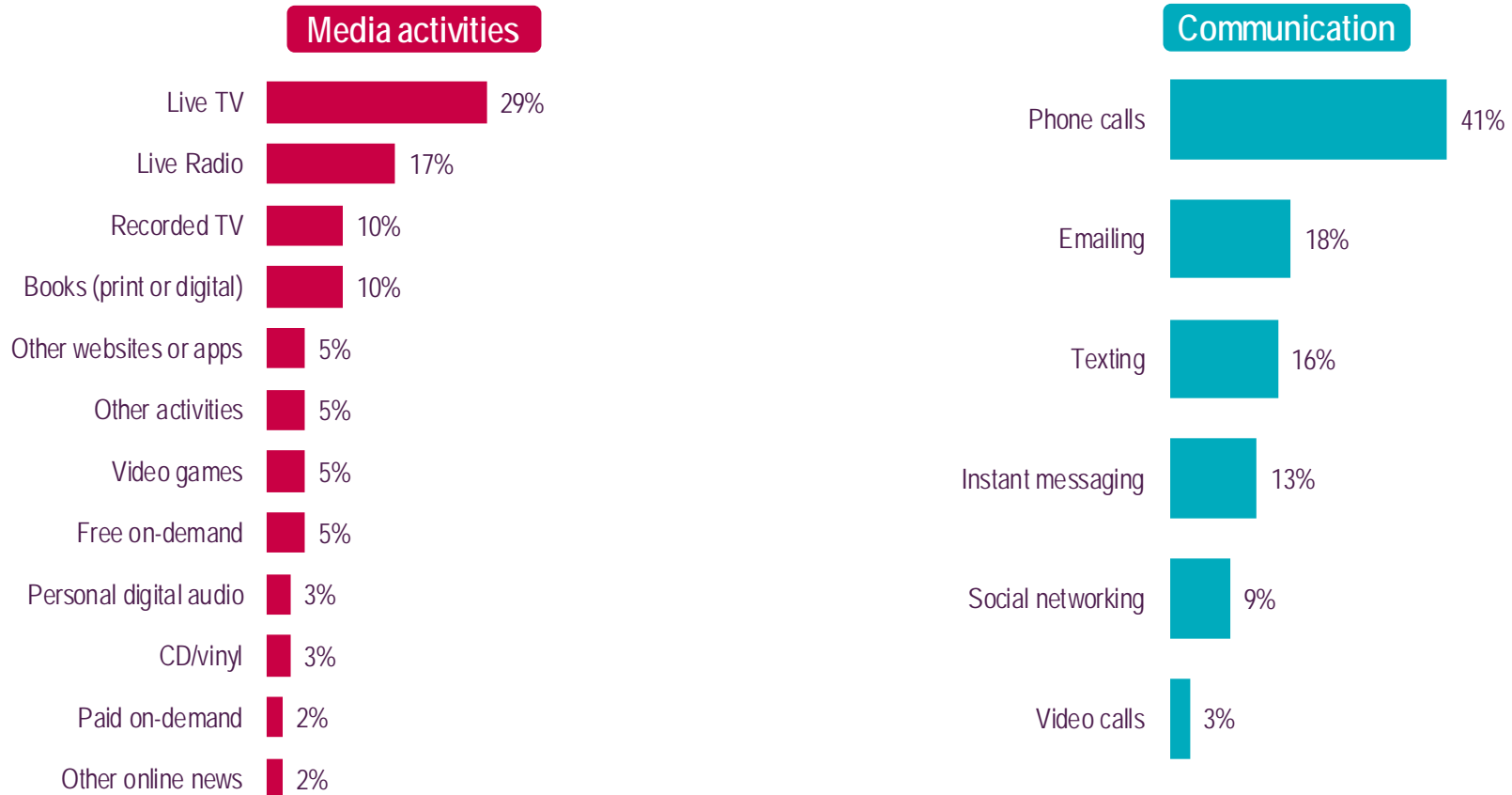
Source: Ofcom Digital Day 2016, Data book 1: B4

Adult diary: Chart shows the mean number of minutes recorded per day for each activity (D) among those who did each one at any point across their diary week i.e. excludes zeros.

Base: Adults aged 16+ in Wales (176)

Figure 1.12

Media and comms activities cited as being of highest personal importance Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 9: A2

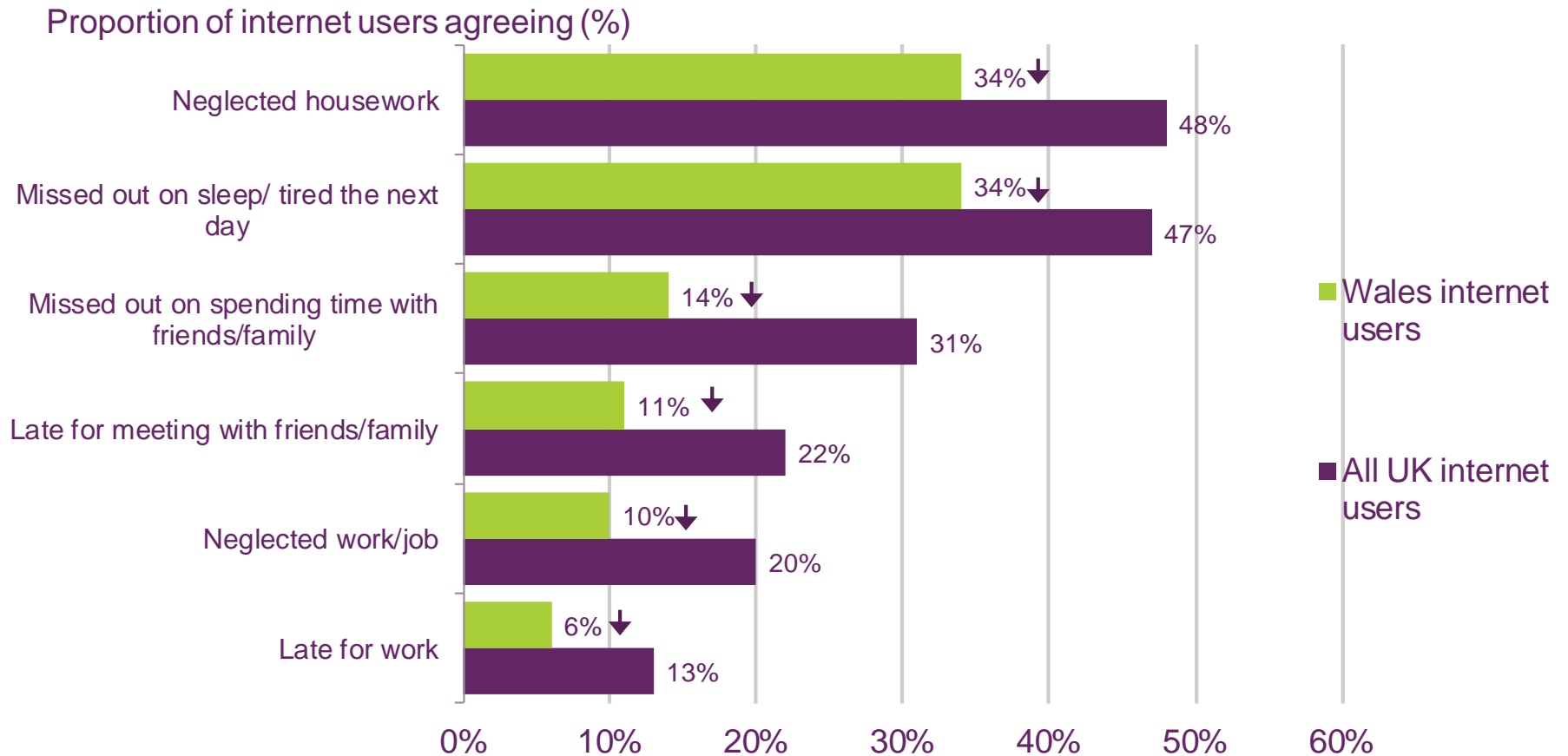
Follow up survey: A2A. Which of the following media activities is most important to you personally?

A2B. Which of the following communication activities is most important to you personally? Only responses above 1% are charted

Base: Adults aged 16+ in Wales (176)

Coping in a connected society

Figure 1.13: Negative effects caused by too much time online



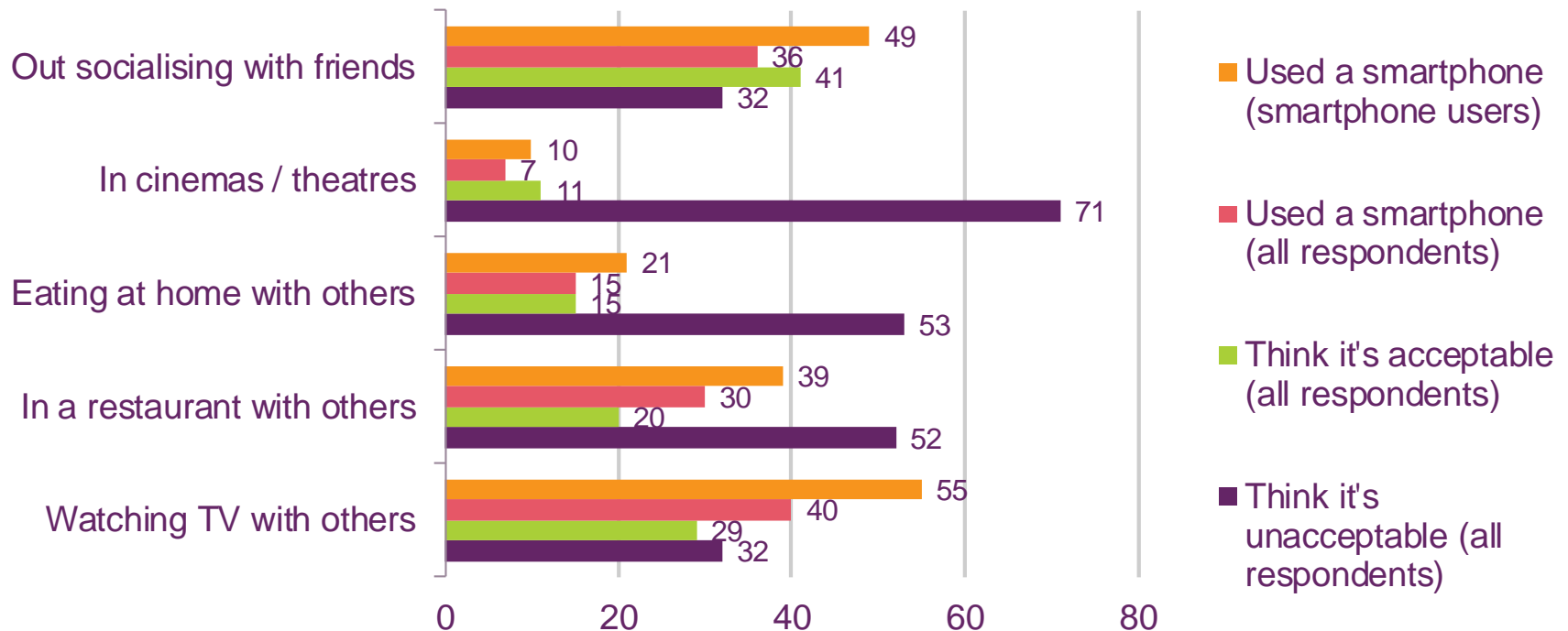
Source: Ofcom research 2016

Base: All going online at least once a month (All: 1,861, Wales: 110)

Q.D7 Have any of these parts of your work or personal life ever been negatively affected by spending too much time online?

Figure 1.14: Use and acceptability of using a smartphone with others in different situations

Proportion of respondents (%)



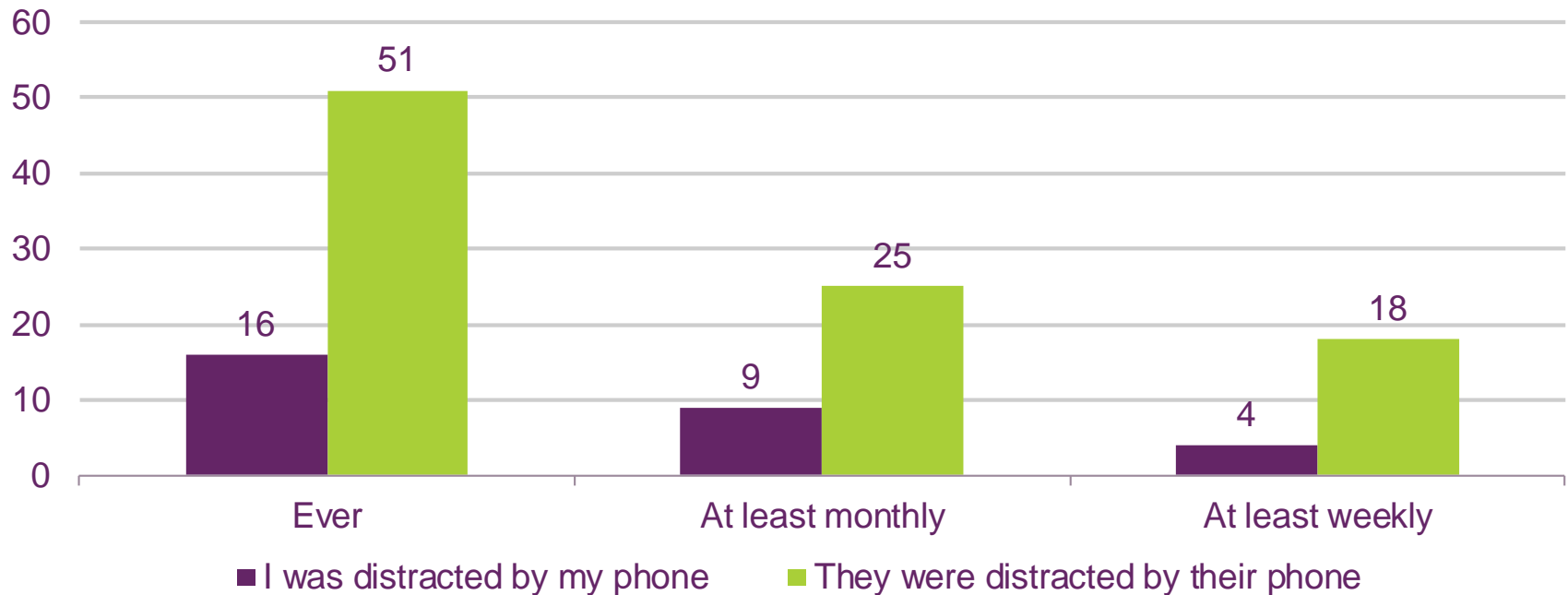
Source: Ofcom research, 2016

Base: All (Wales: 110), smartphone users (82)

Q: For each of the following situations, please indicate if you have personally used and/or have been with others when they have used a smartphone or tablet on each occasion? And for each occasion, could you indicate the extent to which you think using a smartphone at this time is acceptable?

Figure 1.15: Distracted by a phone – bumpers, bumpees and the frequency of collision

Proportion of respondents (%)



Source: Ofcom research, 2016

Base: All (Wales: 119) and all phone users (Wales: 107)

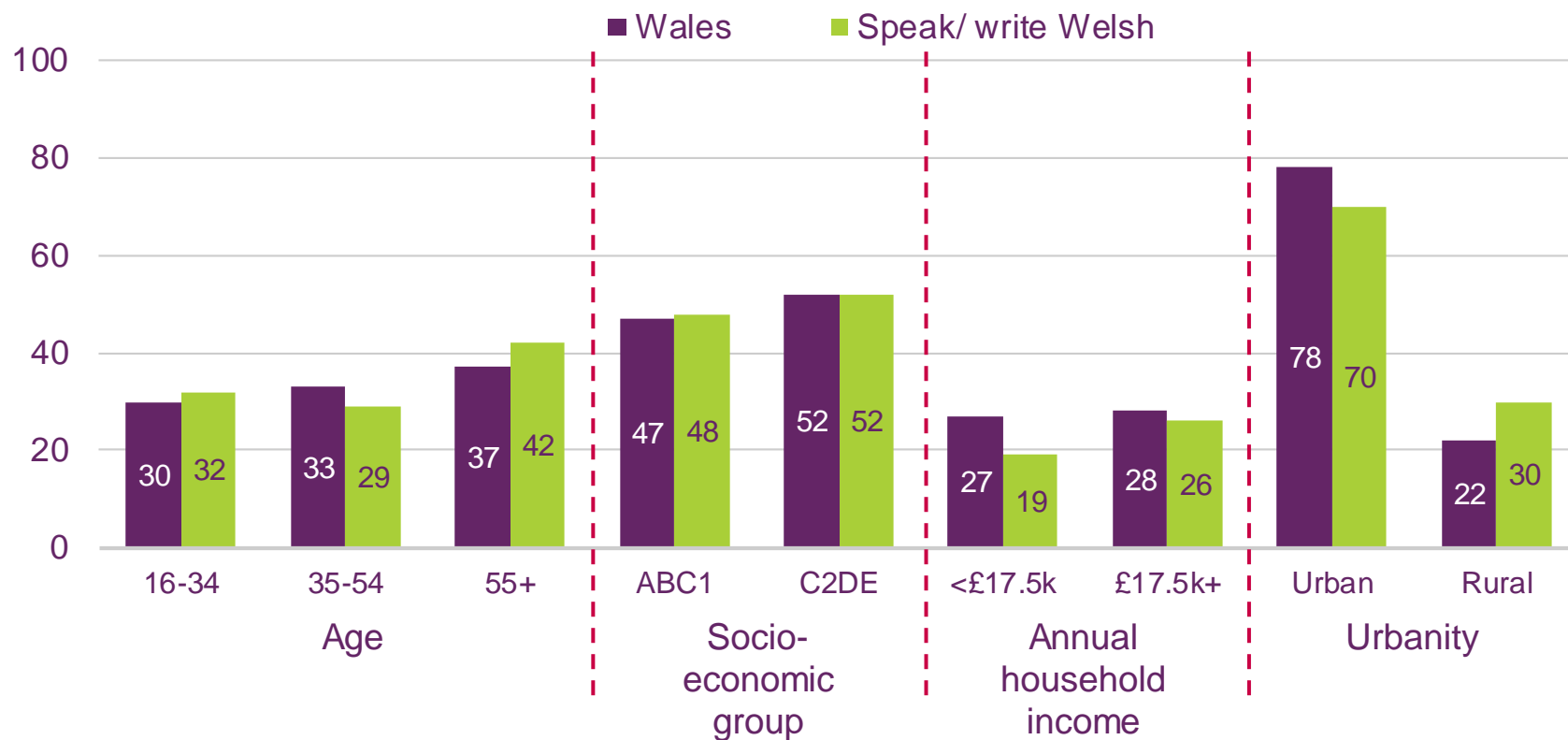
Q: How often, if ever, do people bump into you while walking on the street because they are too busy looking at their phone? Q:

How often, if ever, do you bump into people or anything else while walking on the street because you are too busy looking at your phone?

Take-up of key communications services and devices among those who can speak or write Welsh

Figure 1.16

Demographic profile of those who can speak or write in Welsh



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ : 489 Wales, 135 speak or write Welsh (fluent and non-fluent)

Note: Figures for annual household income do not add up to 100% because a proportion of respondents chose not to answer the question or didn't know

Figure 1.17

Take- up of communications services and devices in Wales

	Wales (total)	Respondents who speak or write Welsh
Fixed line	85%	90%
Mobile phone (personal use)	91%	84%
Smartphone (personal use)	65%	59%
Computer (any type)	85%	76%
Tablet computer in household	67%	64%
Total internet	84%	74% ↓
Broadband (fixed and mobile)	79%	71%
Fixed broadband	77%	70%
Mobile internet	61%	52%
Smartphone internet access only	4%	1%
DAB radio	42%	53%
Pay TV on main set	68%	64%
Bundle	67%	60%

Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+: 489 Wales, 135 speak or write Welsh (fluent and non-fluent)

Arrows indicate significant increase/ decrease compared to Wales as a whole at the 95% confidence level.

Note: Mobile internet = using a mobile phone or smartphone for web/data access.