

5 Internet and online content

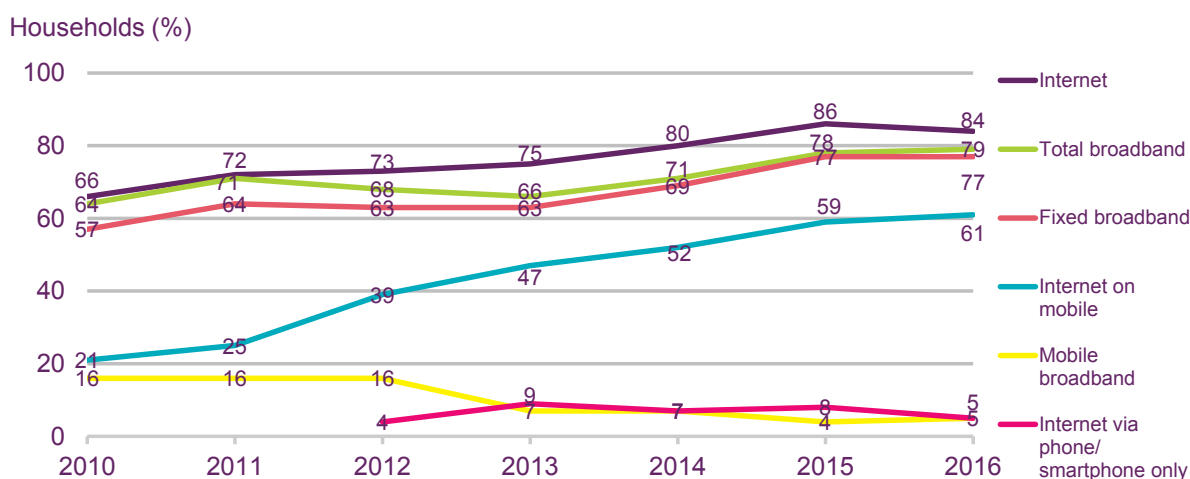
5.1 Internet take-up

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

In 2016, more than eight in ten households in Wales had access to the internet.¹⁷ Internet take-up levels in Wales are statistically unchanged since 2015.

Almost eight in ten households in Wales (77%) had access to fixed broadband at home, and six in ten (61%) adults in Wales had online access through a mobile phone, both figures unchanged since 2015. The proportion of adults in Wales accessing the internet exclusively through a mobile phone or smartphone remains stable at 5%.

Figure 5.1 Internet take-up in Wales: 2010-2016



Source: Ofcom Technology Tracker. Data from Q1 of each year 2010-2014, then H1 2015 and 2016
 Base: All adults aged 16+ (n = 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 489 Wales 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales 2015 and 2016.

Note 1: 'Internet' includes access to the internet 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 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: '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.

¹⁷This 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

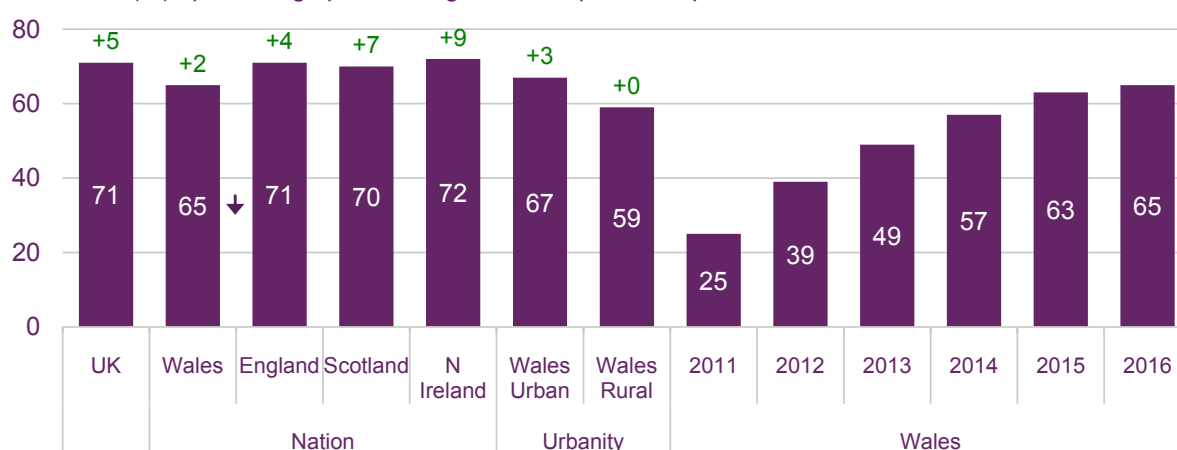
Smartphone ownership in Wales was lower than for the UK overall

In 2016, smartphone ownership among adults in Wales was lower than the UK overall (65% vs. 71%). This is a change since 2015, when levels of smartphone ownership in Wales and in the UK as a whole were comparable; this change is a result of the UK figure having risen by 5 percentage points.

Smartphone ownership does not vary significantly 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 H1 2015



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ (n = 3737 UK, 489 Wales, 2239 England, 502 Scotland, 507 Northern Ireland, 240 Wales urban, 249 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 489 Wales 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Wales, urban and rural.

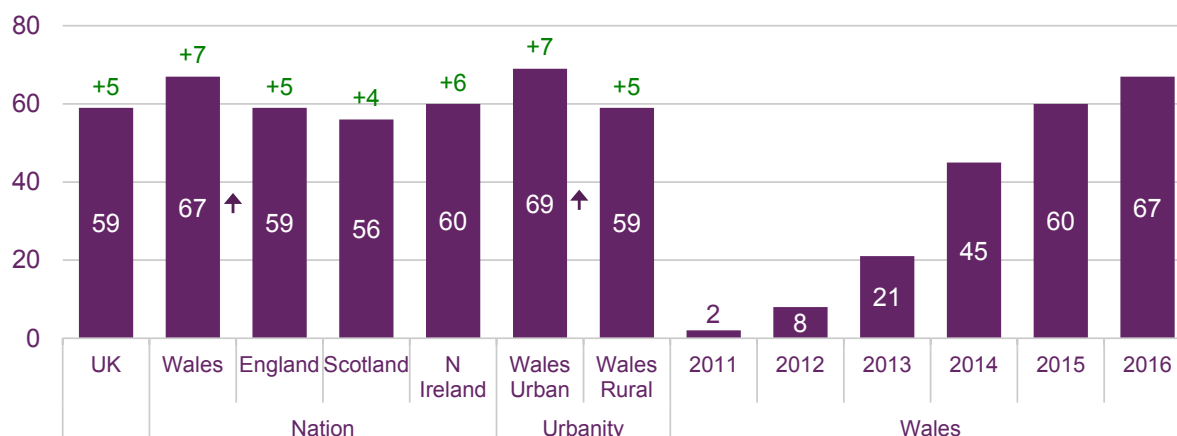
QD24B: Do you personally use a smartphone? A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the web. Popular brands of smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

Households in Wales were more likely than in the UK overall to own a tablet

As in 2015, households in Wales continued to be more likely than households across the UK as a whole to own a tablet computer (67% vs. 59%). This followed significant increases in ownership each year since 2011. Household tablet ownership was higher in urban than in rural areas (69% vs. 59%).

Figure 5.3 Take-up of tablet computers in Wales

Households (%) / percentage point change in take-up of tablet computers from H1 2015



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ (n = 3737 UK, 489 Wales, 2239 England, 502 Scotland, 507 Northern Ireland, 240 Wales urban, 249 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 489 Wales 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Wales, urban and rural.

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

Internet users in Wales were more likely than in the UK as a whole to say that a tablet was their most important device for going online

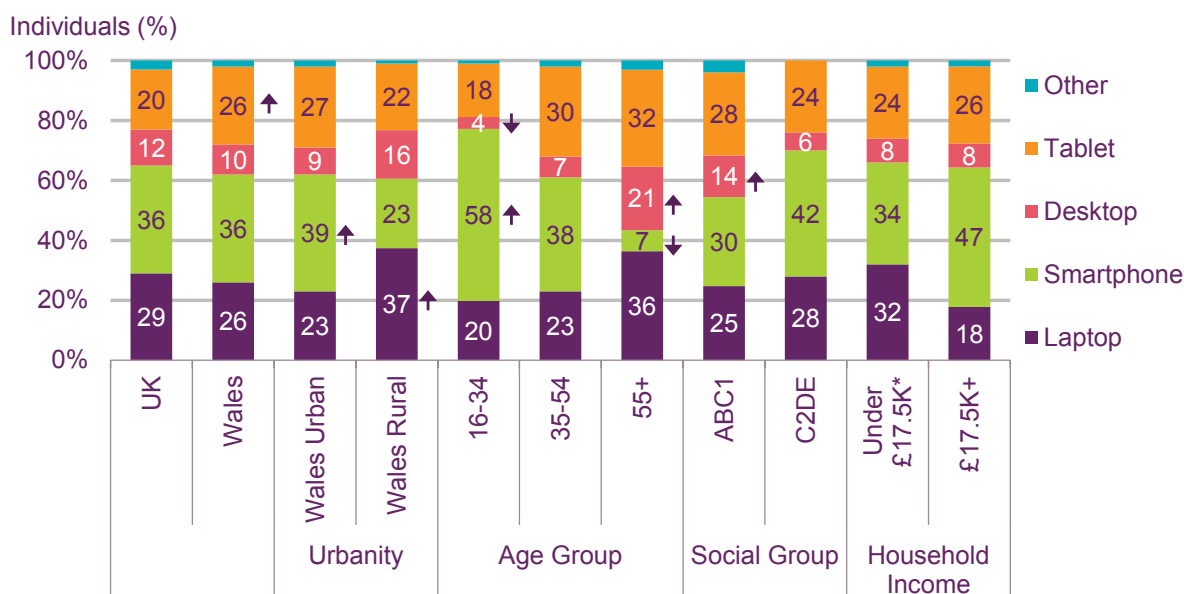
A quarter of internet users in Wales said that their tablet was their most important device for going online; higher than the one in five who said this in the UK as a whole. This may be due to higher tablet take-up in Wales than in the UK overall.

More than a third of internet users¹⁸ 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 over 55, and those living in rural areas, the smartphone was considered to be the most important device for internet access across all demographics. For example, 58% of 16-34s considered the smartphone to be the most important device, compared to 7% of over-55s. More than a third (34%) of ABC1s considered the smartphone to be their most important device; this rose to just under a half (47%) of internet users in C1DE households.

¹⁸ Internet users are defined as those who ever go online, either at home or elsewhere.

Figure 5.4 Most important device for accessing the internet in Wales



Source: Ofcom Technology Tracker, H1 2016

Base: Internet users aged 16+ (n = 3100 UK, 401 Wales, 199 Wales urban, 202 Wales rural, 130 16-34, 125 35-54, 146 55+, 234 ABC1, 166 C2DE, 99 under £17.5K, 101 £17.5K+).

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and the UK in 2016, between Wales urban and rural in 2016, by age compared to all internet users in Wales in 2016, between socio-economic groups in Wales in 2016 and between household income groups in Wales in 2016.

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'. * Caution: low base

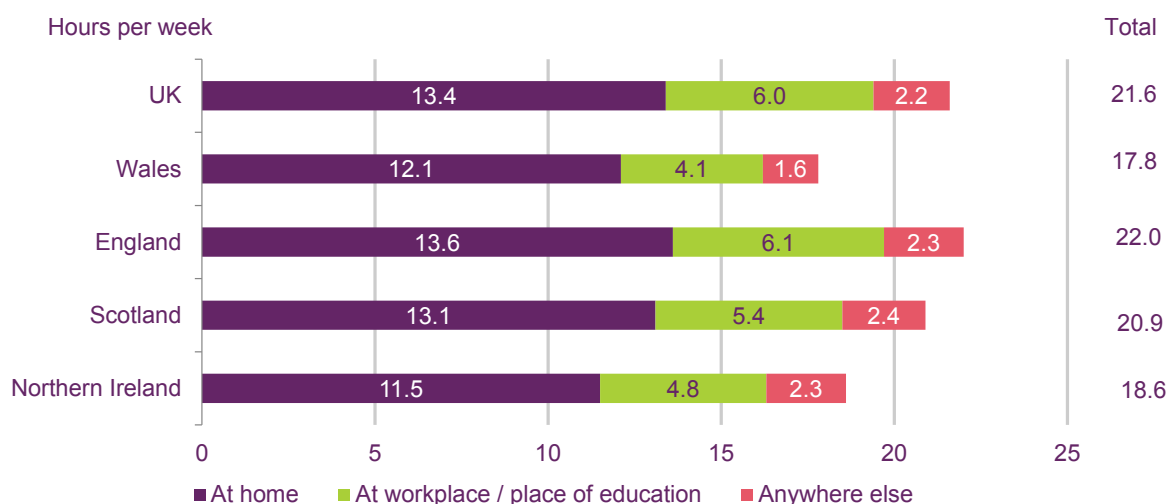
5.3 Internet use

Internet users in Wales spent an average of 17.8 hours online per week in 2015

According to research conducted for Ofcom's *Adult Media Literacy Report*,¹⁹ internet users in Wales claimed to spend an average of 17.8 hours online per week in 2015. This was statistically unchanged since 2014. Of this, they spent 12.1 hours online at home. Time spent online at their workplace or place of education was significantly lower than in England and the UK as a whole. Time spent online anywhere else was also significantly lower compared to the UK and all other nations.

¹⁹ Available 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: 2015



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2015.

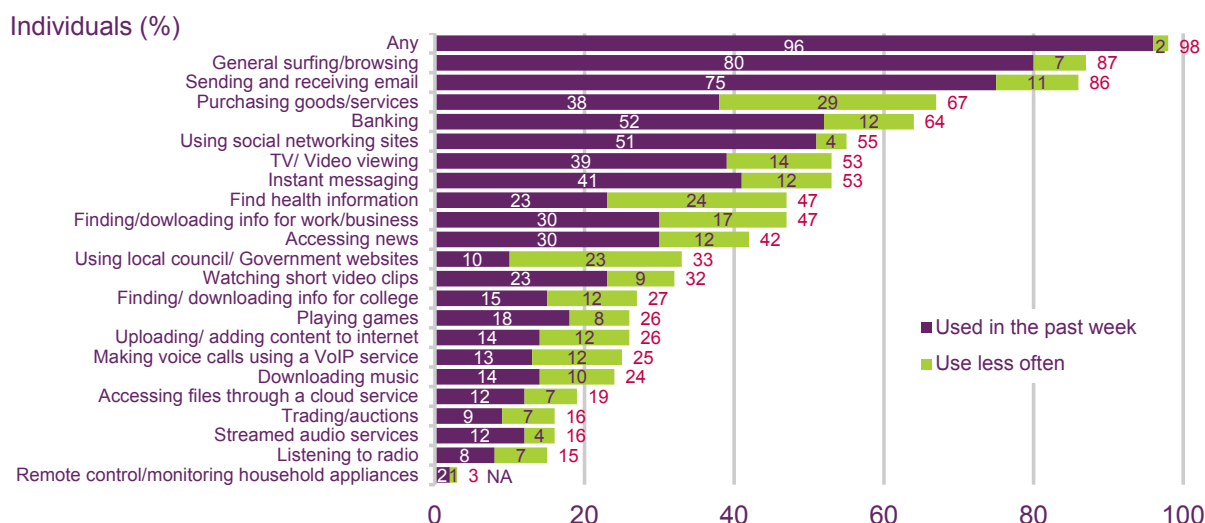
Base: All adults aged 16+ who use go online at home or elsewhere (1548 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Question: IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your work place or place of education/ anywhere else? (Unprompted responses, single coded)

General surfing or browsing and sending and receiving email were the most popular activities among internet users in Wales in 2016

The most popular internet activities among adults in Wales in 2016 were general surfing/browsing (87%) and sending/ receiving email (86%). These were also reported as being the most used in the past week.²⁰ Purchasing goods/services was the next most popular activity (67%) followed by using the internet for banking (64%), although banking was the most used activity in the past week.

Figure 5.6 Activities carried out online by internet users in Wales



Source: Ofcom Technology Tracker, H1 2016

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 401 Wales 2016)

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

²⁰ 'The past week' being that at the time of respondents' interviews.