



# Communications Market Report: Wales

Research Document

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# About this document

The report contains statistics and analysis of the Wales communications sector and is a reference for industry, stakeholders and consumers. It also provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

The report contains data and analysis on broadcast television and radio, fixed and mobile telephony, internet take-up and consumption and post.

We publish this report to support Ofcom's regulatory goal to research markets constantly and to remain at the forefront of technological understanding. It also fulfils the requirements on Ofcom under Section 358 of the Communications Act 2003 to publish an annual factual and statistical report. It also addresses the requirement to undertake and make public our consumer research (as set out in Sections 14 and 15 of the same Act).

# Introduction

This is Ofcom's tenth annual review of the communications market in Wales. The report offers a detailed overview of communications services across the nation and monitors key trends in the availability and take-up of communications services across Wales.

This year's report includes research data commissioned from the British Population Survey that explores the use of communications services at a more granular level in Aberystwyth, Cardiff, Newport, Swansea and Wrexham.

Although individuals in Wales continue to watch significantly more television on average than those in the UK as a whole, the average time spent watching broadcast television declined by 12 minutes in 2014.

PSB spend by the BBC and ITV on non-network nations programming in Wales increased by 6% in nominal terms to £27.2m in 2014. The total spend by the BBC and ITV Wales on current affairs programming for people in Wales increased by 16% and spending on news increased by 15%. Spending on non-news programming declined by 2% in 2014.

Despite a 2% increase in first-run originated output during the year, first-run originated hours in Wales are down by 9% (943 hours) since 2009 – the largest decline in any UK nation. S4C spend on first-run commissioned programming remained stable at £63m.

In radio, Wales continues to have the highest share (59%) of listening to BBC services and the lowest share of listening to local commercial radio (26%). Ownership of DAB radio has remained unchanged at 47% but year-on-year growth in digital listening was highest in Wales, at 3 percentage points.

Close to nine in ten households in Wales now make use of the internet, and superfast broadband is now available to 79% of premises in Wales, the highest availability in the devolved nations. Take-up of broadband services (fixed and mobile) is now on a par with the UK average (78%) and higher than in Scotland or Northern Ireland.

In addition to our annual assessment of audio-visual, telecoms and postal services, the *Communications Market Report* for Wales 2015 provides analysis of the take-up of communications services and devices among those who can speak or write Welsh. The research suggests that those who can speak or write Welsh are significantly more likely than all adults in Wales to have a landline at home and significantly less likely to have internet access.

Finally, 62% of organisations in Wales say they have switched some of their communications from post to another method in the past 12 months: this is in line with the UK average.

The information set out in this report does not represent any proposal or conclusion by Ofcom in respect of the current or future definition of markets. Nor does it represent any proposal or conclusion about the assessment of significant market power for the purpose of the Communications Act 2003, the Competition Act 1998 or any other relevant legislation.

The full data set and charts are available in a searchable resource, which can be found at [www.ofcom.org.uk/cmrwales](http://www.ofcom.org.uk/cmrwales). Companion reports for the UK and each of the nations can be found at [www.ofcom.org.uk/cmr](http://www.ofcom.org.uk/cmr).

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# Setting the scene

## Key facts about Wales

Figure	Wales	UK
Population	3.082 million (mid-2013 estimate)	64.106 million (mid-2013 estimate)
Age profile	Population aged <16: 18.0% Population aged 65+: 19.5%	Population aged <16: 18.8% Population aged 65+: 17.4%
Population density	148 people per square kilometre	263 people per square kilometre
Language	18.6% of the population can speak Welsh	n/a
Unemployment	6.7% of economically active population, aged 16 and over	5.5% of economically active population, aged 16 and over
Income and expenditure	Weekly household income: £618 Weekly household expenditure: £439	Weekly household income: £724 Weekly household expenditure: £497

Source: Office for National Statistics: *Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2013*; Office for National Statistics: *Regional Labour Market, May 2015*; Office for National Statistics: *Family Spending 2014 edition*; Office for National Statistics: *2011 Census, Key Statistics for Unitary Authorities in Wales*.

### A note on our survey research

We conducted a face-to-face survey of 3,756 respondents aged 16+ in the UK, with 496 interviews conducted in Wales. Quotas were set and weighting applied to ensure that the sample was representative of the population of Wales in terms of age, gender, socio-economic group and geographic location. Fieldwork took place in January and February 2015.

Respondents were defined as urban if they lived in a settlement with a population of 2000 or more and rural if they lived in areas with smaller populations. The survey sample in Wales has error margins of approximately +/- 3-6% at the 95% confidence level. In urban and rural areas; survey error margins are approximately +/-4-7%.

In addition to the survey data, this report refers to information from a range of other sources, including data provided to Ofcom by stakeholders. Tables summarising the data collected in our survey are published on Ofcom's website.



# 1 Wales' communications market

## 1.1 Key findings for Wales

### Introduction

This section sets out a selection of the key facts and figures relating to communications markets across Wales in 2014<sup>1</sup>, comparing and contrasting nations and highlighting changes that have taken place in the past year.

### Key findings for Wales

#### Changes in audio-visual consumption in Wales

- **On average, people in Wales watched 12 minutes less broadcast television per day in 2014 than in 2013** The decline in broadcast TV viewing in Wales was higher than in England<sup>2</sup> (9 mins/day), Scotland (7 mins/day) and the UK (network) as a whole (11 mins/day) but lower than the decline seen in Northern Ireland (15 mins/day).
- **Despite the decline in TV viewing, people in Wales spend the largest number of hours per day watching TV compared to the UK as a whole.** In 2014, people in Wales spent an average of 4 hours 11 minutes per day watching television, higher than Scotland (3 hours 59 minutes), Northern Ireland (3 hours 47 minutes) and the UK average (3 hours 47 minutes).
- **Ofcom's consumer research found fewer people in Wales claiming they were watching traditional TV (i.e. at the time of broadcast) compared to the previous year:** 8% of respondents said they were doing this more, while 27% said they were doing it less, a net change of -19%.
- **The research also showed increases in non-traditional viewing among Welsh respondents.** Net gains were +40% for watching using non-subscription catch-up (e.g. iPlayer), +18% for watching content personally recorded, and +13% of respondents using subscription on-demand services (e.g. Netflix).
- **Claimed reductions in traditional TV viewing (i.e. at time of broadcast), viewing via a TV screen, and viewing content from public service broadcasters,** were lower than reductions in watching DVDs (a net loss of -30% in Wales) and going to the cinema (-35% in Wales) over the same period.
- **Of all adults in Wales, 48% said they had used catch-up services in 2015, an increase of 8 percentage points since the same time in 2014.** This is in-line with catch-up usage in Scotland (49%) and the UK as a whole (48%), and higher than in Northern Ireland (32%). Use of both standalone video subscription services (14%) and PVRs (63%) are similar to the UK average.

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<sup>1</sup> The Ofcom *Technology Tracker* also includes data from Q1 2015.

<sup>2</sup> The figure for England reflects the average across the English regions with the largest decline in North East (-17 minutes) and the smallest decline in Border (-2 minutes).

## Social communication online and social networking

- **Three-quarters of internet users in Wales say that technology has changed the way they communicate, and two-thirds say these new communications methods have made life easier, both higher than in any other UK nation.** However, these new communication methods also bring some downsides. Just under half of all online adults in Wales (46%) agree that being online interrupts face-to-face conversations and around one in six (17%) say that they spend too much time online compared with spending time with friends and family.
- **Text messaging (79%), email (74%) and meeting face to face (73%) are the most commonly used forms of weekly communications with friends and family in Wales among online adults.** Voice calls (66%), social media (58%) and instant messaging (47%) are also commonly used forms of communication. Around one in five online users in Wales also use Twitter (23%), make comments on websites (20%), and use voice calls over the internet (19%) to communicate with friends and family.
- **Over one in five Welsh adults say they are ‘hooked’ on social media.** Overall, 22% of adults in Wales indicated a rating of between 7 and 10 on a 10-point scale (where 1 equated to ‘I’m not at all hooked on social media’ up to 10, ‘I’m completely hooked on social media’).
- **Facebook is the most popular social media brand.** Over eight in ten (83%) online adults in Wales claim to have used Facebook, when prompted with a list of websites. YouTube (72%) is also used by a majority in Wales. Twitter (48%) and WhatsApp (40%) are also used by a sizeable minority.
- **Use of Twitter is higher among online adults in Wales (48%), compared to the other nations.** Twitter is used by 40% of online adults in England, by 32% in Scotland and by 33% in Northern Ireland.

## TV and audio-visual content

- **Total nominal PSB spend on current affairs and news programming for people in Wales increased year on year by 16% and 15% respectively.** There was a decrease in spend on non-news/ non-current affairs programming. These figures reflect an overall 6% increase in PSB spend on programming for people in Wales, in nominal terms.
- **The total number of hours broadcast by S4C in 2014 rose by 68 hours to 6,788 hours, driven by an increase in repeats,** which accounted for 57% of all programming during the year, up by 4%; from 3,737 hours in 2013 to 3,876 hours in 2014. First-run commissions from indie companies fell by 3% year on year, bringing the total to 1,916 hours in this category.
- **Over half of households in Wales receive satellite television through the main set; this remains higher than the UK average.** In 2015, satellite penetration across Wales as a whole was unchanged since 2014 at 53%, higher than the UK average of 41%. Smart TV ownership in Wales increased by 8pp to 17% in 2014, on a par with the UK average.
- **Cardiff and Aberystwyth are less likely than the rest of Wales to have pay-TV services.** Across the whole of Wales, 57% of the population have pay-TV, compared



to 47% in Cardiff and 27% in Aberystwyth. This may be because more people live in rented accommodation in these towns/cities.

- **Those who speak or write Welsh are now more likely than in 2014 to have pay-TV on their main TV set (70% in 2015 vs. 54% in 2014).** This is similar to the increase for all adults in Wales since 2014.
- **Freesat is more popular in towns in North Wales than in the South Wales cities.** This may reflect coverage issues for digital terrestrial television in the north of Wales.

#### Radio and audio content

- **More people in Wales listen to radio, and they listen for longer, than in the UK as a whole.** In 2014 radio services reached 94.5% of the adult population in Wales and listeners tuned in for an average of 22.4 hours per week. For the UK on average, 89.5% of the population listen for 21.4 hours each week.
- **Close to half of adults in Wales who listen to radio have a digital radio set.** The proportion of radio listeners in Wales who owned at least one DAB set in 2015 was unchanged since the previous year (47%). Ownership of DAB radio sets in Wales is on a par with the UK average.
- **Those whose speak or write Welsh are significantly more likely than all adults in Wales to have a DAB radio set at home (53% vs. 39%).**
- **Wales was the only nation where revenue for local commercial stations declined in 2014.** Local commercial radio revenue fell by 2.9% to £4.84 per head of population. Commercial radio revenue per head of population is also far lower in Wales. The UK average is £6.45.

#### Telecoms and networks

- **Total broadband penetration increased by seven percentage points, to 78%, in Wales in the year to Q1 2015.** This increase was due to growth in the take-up of fixed broadband services over the period.
- **Seventy-nine per cent of premises in Wales were able to receive superfast broadband services in May 2015.** This was the second highest proportion across the UK nations, after England (84%).
- **Wales had the second largest increase in 4G availability among the UK nations between June 2014 and May 2015.** Over this period the proportion of premises in areas with outdoor 4G mobile coverage increased by 18.4 percentage points in Wales to 62.8%, although this was the lowest proportion across the UK nations.
- **Just under a quarter (23%) of adults in Wales had a 4G service in Q1 2015.** This was below the UK average of 30% despite representing an increase of 12 percentage points compared to the previous year.
- **The proportion of homes in Wales that are mobile-only has fallen since 2014.** Just under one in five households in Wales (17%) were mobile-only in Q1 2015, a decline of five percentage points since Q1 2014.

## Internet and web-based content

- **Internet take-up in Wales increased between 2014 and 2015 to around 17 in every 20 households (86%).** This was a rise of six percentage points on the 2014 figure (80%).
- **Smartphone ownership in Wales was stable in 2015, at six in ten (63%) adults, in line with the UK as a whole.**
- **Tablet ownership in Wales has reached 60% of households** following growth of 15 percentage points since 2014. This means that tablet ownership is higher in Wales than in the UK as a whole (54%).
- **Those whose speak or write Welsh are significantly less likely than all adults in Wales to have internet access** (by any means) at home (76% vs. 86%), and less likely to have smartphone-only internet access (2% vs. 7%).
- **In 2014 internet users in Wales said they spent significantly more time using the internet at home (15.3 hours a week) than the average of 12.6 hours per week for the UK as a whole.** Overall, internet users in Wales spend an average of 21.2 hours online a week.

## Post

- **Adults in Wales send more post than the UK as a whole.** Three-quarters of adults in Wales claimed to have sent at least one item by post in the past month. They claim to send 6.5 items of post each month on average; slightly more than the UK average of 6.0 items.
- **Adults in Wales are the most likely to have sent parcels in the past month.** People in Wales are slightly more likely than those in the rest of the UK to have sent parcels in the past month (42% vs. 40% across the UK). They are the least likely to have sent payments for bills through the post.
- **Almost nine in ten people in Wales are satisfied with Royal Mail.** The majority (88%) say they are satisfied with the service received from Royal Mail, compared to 86% across the UK as a whole.

**Figure 1.1 Fast Facts for Wales**

**Nations' Fast Facts: wave 1 2015 (%)**– unless otherwise stated, figures relate to household take-up

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural	Wales urban	Wales rural
Digital TV take-up	97	97	96	98	97	96 <sup>-</sup>	98 <sup>+</sup>	98	98
Pay digital TV	59	58	58 -10	67 <sup>1+</sup> +10	63	59 <sup>+</sup>	55 <sup>-</sup>	69 +11	61
Freeview-only TV	30	30 -3	35 <sup>2</sup> +10	24 <sup>-</sup> -9	28	30 <sup>-</sup>	35 <sup>+</sup>	23 -11	27
Smart TV take-up (among TV homes)	21 +9	21 +9	19 +11	17 +8	15 <sup>-</sup> +8	20 +8	23 +12	16 +8	18
HDTV service (among those with an HDTV)	75 +5	75 +5	75	69 <sup>-</sup>	75	74 <sup>-</sup> +4	81 <sup>+</sup>	67 <sup>-</sup>	78 <sup>+</sup>
DAB ownership (among radio listeners) <sup>3</sup>	43	44	37	47	29 <sup>-</sup>	42 <sup>-</sup>	50 <sup>+</sup>	49 <sup>+</sup>	38 <sup>-</sup>
Catch-up TV/ film viewing online/ on-demand (via any device, among those who use the internet)	56 +5	56 +5	62	57	42 <sup>-</sup>	56 +4	56 +10	58	54
Total internet access at home (via any device)	85 +3	86 +4	78 <sup>-</sup>	86 +6	79 <sup>-</sup>	85 +3	85	86	85
Broadband take-up at home (fixed or broadband)	80 +3	81 +4	73 <sup>-</sup>	78 +7	72 <sup>-</sup>	79 +3	82	77	80
Use mobile to access internet	61 +4	62 +5	59	59	60 +9	62 <sup>+</sup> +4	55 <sup>-</sup>	60	51
Mobile phone take-up (personal use)	93	93	91	90	91	92	93	90	89
Smartphone take-up (personal use)	66 +5	67 +6	63	63	63 +8	67 <sup>+</sup> +5	59 <sup>-</sup>	64	59
4G service take-up (among smartphone owners)	45 +26	45 +26	55 <sup>+</sup> +25	36 <sup>-</sup> +16	40 +25	46 <sup>+</sup> +26	35 <sup>-</sup> +16	38 +18	28
Fixed landline take-up	84	85	82	83	84	84 <sup>-</sup>	90 <sup>+</sup>	82	85
Desktop PC take-up	34	37	22 <sup>-</sup>	26 <sup>-</sup>	28 <sup>-</sup>	34	35	24 <sup>-</sup>	34 <sup>+</sup>
Laptop take-up	65	66	55 <sup>-</sup>	65 +8	55 <sup>-</sup>	64	67	65 +10	65
Tablet computer take-up	54 +10	54 +10	52 +10	60 <sup>+</sup> +15	54 +9	54 +11	55 +8	62 +16	54 +12
E-reader take-up (personal use)	20 +3	20 +3	14 <sup>-</sup>	19	15 <sup>-</sup>	19 +3	22	19	18
Households taking bundles	63	64	61	67 +8	61 +7	63	67	68 +9	64

Key: <sup>+</sup>Figure is significantly higher for nation than UK average or significantly higher for nation's urban/ rural than for nation's rural/ urban; <sup>-</sup>Figure is significantly lower for nation than UK average or significantly lower for nation's urban/ rural than for nation's rural/ urban; <sup>+xx</sup> Figures have risen significantly by xx percentage points since W1 2014; <sup>+xx</sup> Figures have decreased significantly by xx percentage points since W1 2014;

	UK	England	Scotland	Wales	Northern Ireland
Fixed telephony availability	100	100	100	100	100
Fixed broadband availability <sup>4</sup>	99.98	100	99.86	100	100
LLU ADSL broadband availability <sup>5</sup>	95	96	89	93	89
Virgin Media cable broadband availability <sup>6</sup>	44	47	36	21	27
BT Openreach / Kcom fibre broadband availability <sup>7</sup>	82	82	75	83	92
NGA broadband availability <sup>8</sup>	90	90	85	87	95
Superfast broadband availability	83	84	73	79	77
2G mobile availability <sup>9</sup>	99.7	99.8	99.5	98.9	98.9
3G mobile availability <sup>10</sup>	99.3	99.6	97.1	97.9	98.6
4G mobile availability <sup>11</sup>	89.5	92.1	79.7	62.8	91.1
DTT availability <sup>12</sup>	98.5	98.6	98.7	97.8	97.4
TV consumption (minutes per day)	220	221 *	239	251	227
Radio consumption (minutes per day)	183	184	171	138	185

Source: Ofcom Technology Tracker W1 2015, BARB, RAJAR, industry data

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 1974 England urban, 290 England rural, 246 Scotland urban, 246 Scotland rural, 249 Wales urban, 247 Wales rural, 249 Northern Ireland urban, 255 Northern Ireland rural)

1. This increase may be attributable to an anomalous decline in Wales of cable TV as the main television set in 2014 - In 2015 cable take-up in Wales increased by 6 pp to 10% over the previous year, returning it to 2013 levels. Market research surveys are subject to sample error and will occasionally report anomalous results.
2. In 2014 the survey data indicated a decline in use of Freeview as a main television service in Scotland. The 2015 measure is similar to the previous measure from 2013. This may suggest that the apparent decrease in 2014 could have been accounted for by sample error.
3. DAB ownership in the nations and UK as reported here is sourced from Ofcom research. The UK CMR uses RAJAR data for DAB ownership
4. Proportion of premises connected to an ADSL-enabled BT local exchange based on BT data, December 2014
5. Proportion of premises connected to an LLU-enabled BT local exchange based on BT data, December 2014
6. Proportion of premises able to receive Virgin Media cable broadband services, May 2015
7. Proportion of premises able to receive BT Openreach/ KCom fibre broadband services, May 2015; under regulatory rules other providers can provide retail fibre broadband services to consumers using these networks.
8. Proportion of premises able to receive NGA broadband services, May 2015
9. Proportion of premises with outdoor 2G mobile coverage from at least one operator, May 2015
10. Proportion of premises with outdoor 3G mobile coverage from at least one operator, May 2015
11. Proportion of premises with outdoor 4G mobile coverage from at least one operator, May 2015
12. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom).

\* This figure reflects the average across the English regions with the highest in Border at 250 minutes (4 hours 10 minutes) and lowest in West at 197 minutes (3 hours 17 minutes) respectively.

## 1.2 Social communication online

### Introduction

Ofcom conducted a survey among internet users to investigate how the internet, and being online and connected, has influenced the way in which people maintain their existing relationships, as well as build new contacts and friendships<sup>3</sup>.

This section looks at Wales. It is worth noting that there are no significant differences between Wales and the other nations, so the story is consistent with the other nations throughout<sup>4</sup>. All figures reported in the narrative relate to Wales unless stated otherwise.

### Attitudes to online communications

#### Three-quarters of internet users in Wales agree that technology has changed the way they communicate

Three-quarters (76%) of internet users in Wales agree that '*technology has changed the way they communicate*' and two-thirds (65%) say that these new communication methods have '*made their life easier*'.

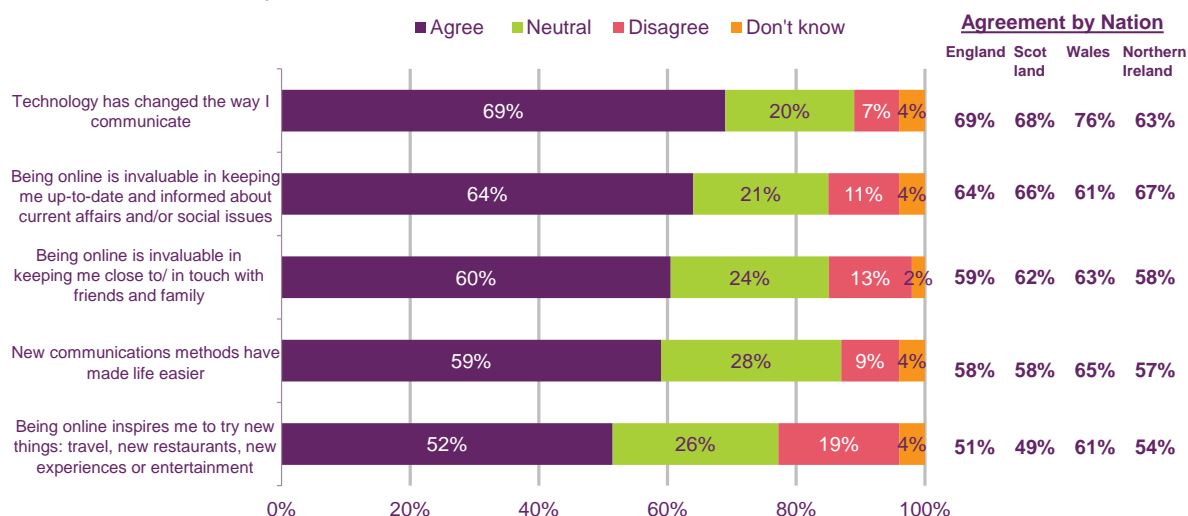
Digital communications are also seen to bring benefits. Around six in ten (61%) online adults in Wales agree that being online is '*invaluable for keeping them informed about current affairs and social issues*' and agree that it helps them '*keep in touch with close family and friends*' (63%). A similar proportion (61%) agrees that it '*inspires them to try new things*'.

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<sup>3</sup> The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults and provides a snapshot of people's personal communications. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.

<sup>4</sup> Due to low base sizes, the confidence with which the population average can be estimated within nation is limited. This means that only large differences between nations (between 8% and 18%) can be reported as significantly different at 95% confidence. No differences between nations are significant when these margins of confidence are applied.

**Figure 1.2 Level of agreement with positive statements about online communications, by nation**



Source: Ofcom research, 'Connected Devices', May 2015

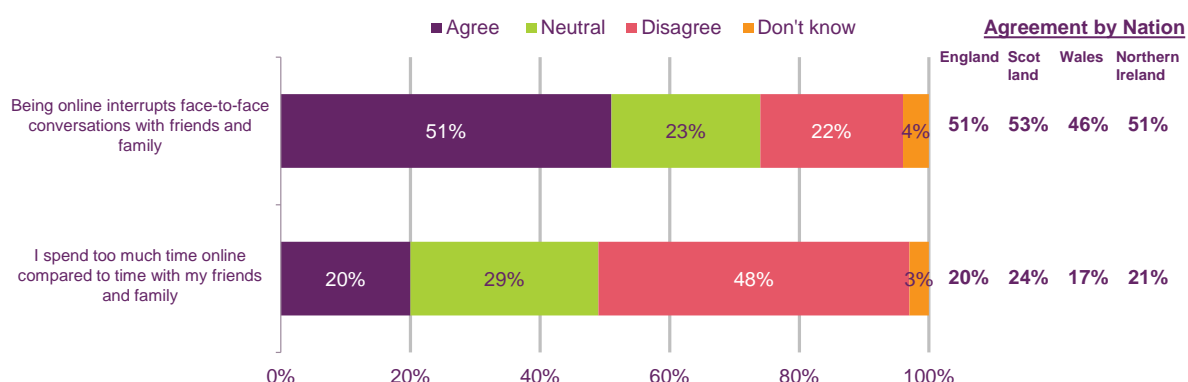
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q115. How much do you agree or disagree with the following statements?

A minority (17%) of adults in Wales think that they spend too much time online compared to time spent with friends and family

Despite the benefits seen in Figure 1.2, these new communication methods also bring some downsides. Just under half of all online adults in Wales (46%) agree that 'being online interrupts face-to-face conversations with friends and family' and around one in six (17%) agree that they 'spend too much time online compared with spending actual time with friends and family'. There is no significant difference between the nations on these two statements.

**Figure 1.3 Level of agreement with negative statements about online communications, by nation**



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q115 How much do you agree or disagree with the following statements?

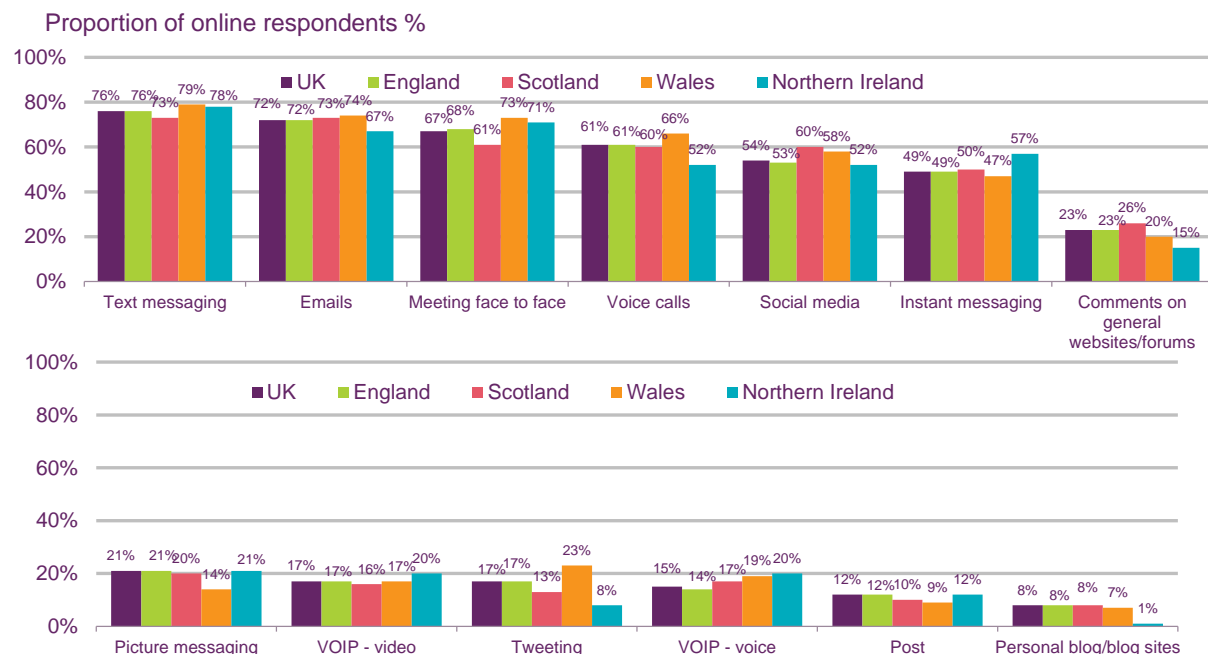
## Communication methods

### Text messaging and email are the most common weekly methods of communication

Figure 1.4 shows that text messaging (79%) and email communications (74%) are the top two most common methods of contact on a weekly basis. However, meeting face-to-face (73%) and voice calls (66%) are also used by a majority. Newer online methods of communication such as social media (58%) and instant messaging (47%) are also used by many people as part of their weekly communications repertoire. Around one in five online users in Wales also use Twitter (23%), make comments on websites (20%), and use voice calls over the internet (19%) to communicate with friends and family.

Postal communications such as letters or cards are used weekly or more often by one in ten online adults (9%), increasing to one in three (32%) when extending the time frame and considering usage once a month or more often.

**Figure 1.4 Methods of communicating with friends and family: once a week or more often, by nation**



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

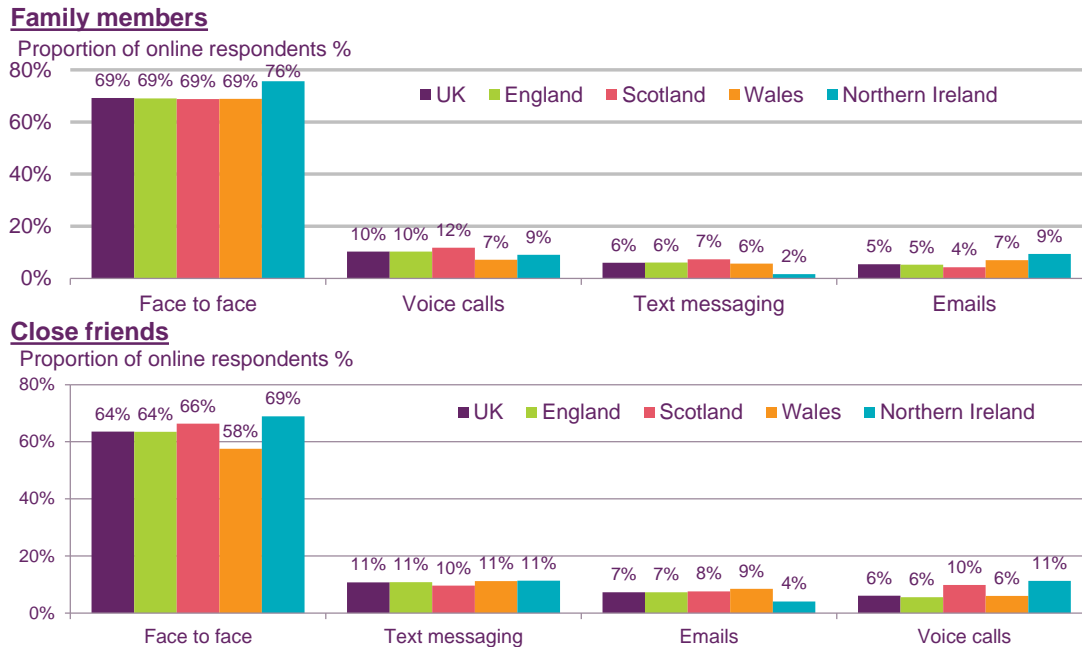
### Communicating with close networks: friends and family

#### Over two-thirds of people in Wales prefer to communicate with family members in person

Figure 1.5 shows that the preferred methods of communication are the same for family and friends, with meeting people face-to-face being the dominant choice (69% for family and 58% for friends). This preference for face-to-face communication is consistent across all of the UK nations.

Voice calls (7% for family and 6% for friends), text messaging (6% for family and 11% for friends) and email (7% for family and 9% for friends) are the next preferred methods. Social media is notable for its low ranking for communicating with family members and close friends<sup>5</sup>.

**Figure 1.5 Preferred methods of communicating with friends and family**



Source: Ofcom research, 'Connected Devices', May 2015  
 Base: All online adults aged 16+ who communicate with family members and close friends.  
 Q52. And which of these methods do you prefer to communicate with ..... ?  
 Chart includes data for all responses 5% or over.

When communicating with groups of friends and family, almost one in five people in Wales prefer to use social media

Figure 1.6 shows the preferred method for communicating with groups of family and friends. While meeting face-to-face remains the preference for many (35% in Wales), social media is favoured by 17% of online adults in Wales, as is text messaging (18%).

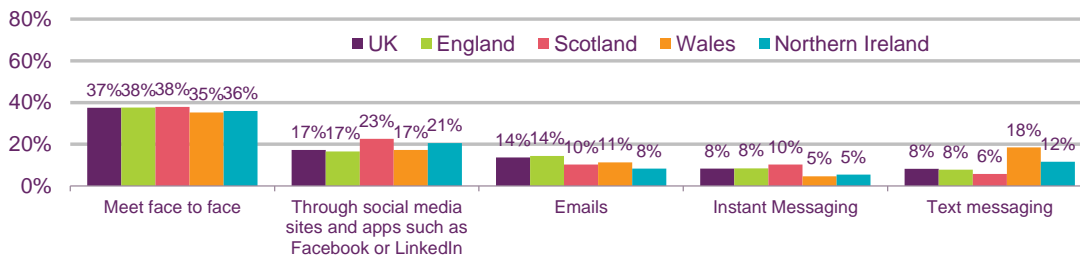
<sup>5</sup> Data are shown for responses 5% or greater on the charts.



**Figure 1.6 Preferred method of communicating with groups of friends and family: once a week or more often, by nation**

**Groups of family and friends**

Proportion of online respondents %



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ who communicate with groups of family and friends.

Q52. And which of these methods do you prefer to communicate with ..... ?

Chart includes data for all responses 5% or over.

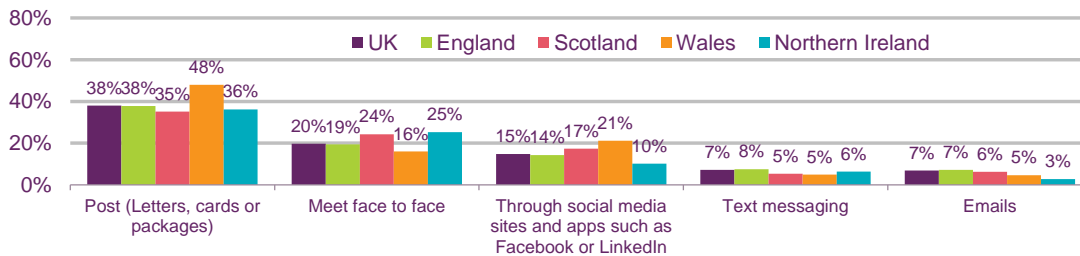
Overall, post is the preferred way of sending a greeting for half of online adults in Wales

Figure 1.7 shows that around half of online adults in Wales (48%) use the postal service to send letters, cards or packets when they wish to send a greeting. A significant proportion (21%) prefer using social media and one in six (16%) prefer face-to-face.

**Figure 1.7 Preferred method of making birthday greetings and congratulations**

**Birthday greetings and congratulations**

Proportion of online respondents %



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ who send greetings for occasions and events such as birthdays, get well, congratulations, etc.

Q52. And which of these methods do you prefer to communicate for ..... ?

Chart includes data for all responses 5% or over.

**Communicating with people who are less well known**

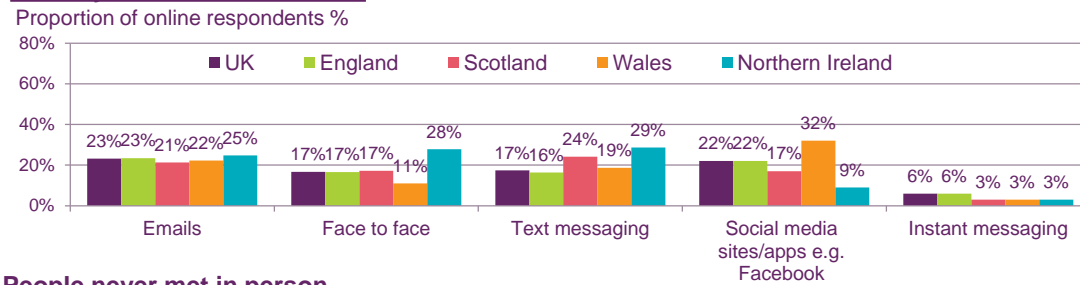
Social media is the preferred methods for communicating with people less well known

In Wales social media (32%) is the preferred method of communicating with people known less well followed by email (22%) and text messaging (19%). Face-to-face (11%) is still a preferred method for one in ten.

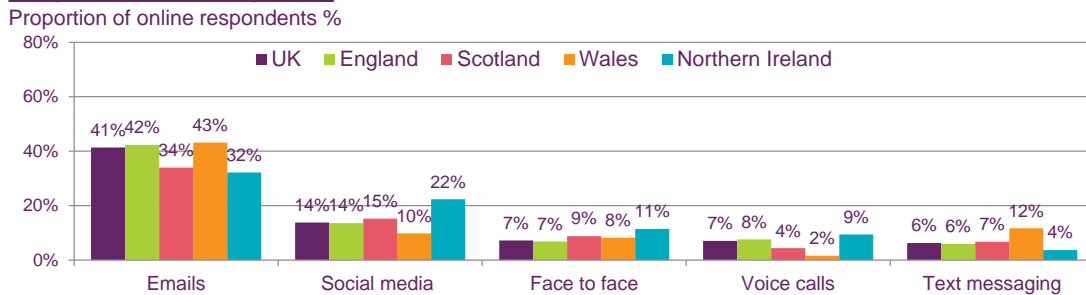
Email's dominance rises (at 43%) to become a significant minority preference for contacting people never met in real life, followed by text messaging (12%) and social media (10%).

**Figure 1.8 Preferred method of communicating with people less well known**

**Friend you don't know so well**



**People never met in person**



Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ who communicate with friends not known so well and people never met in person.

Q52. And which of these methods do you prefer to communicate with ..... ?

Chart includes data for all responses 5% or over.

**Making new contacts online**

Of the 19% of online adults in Wales who use dating websites, over half have made new friendships through them

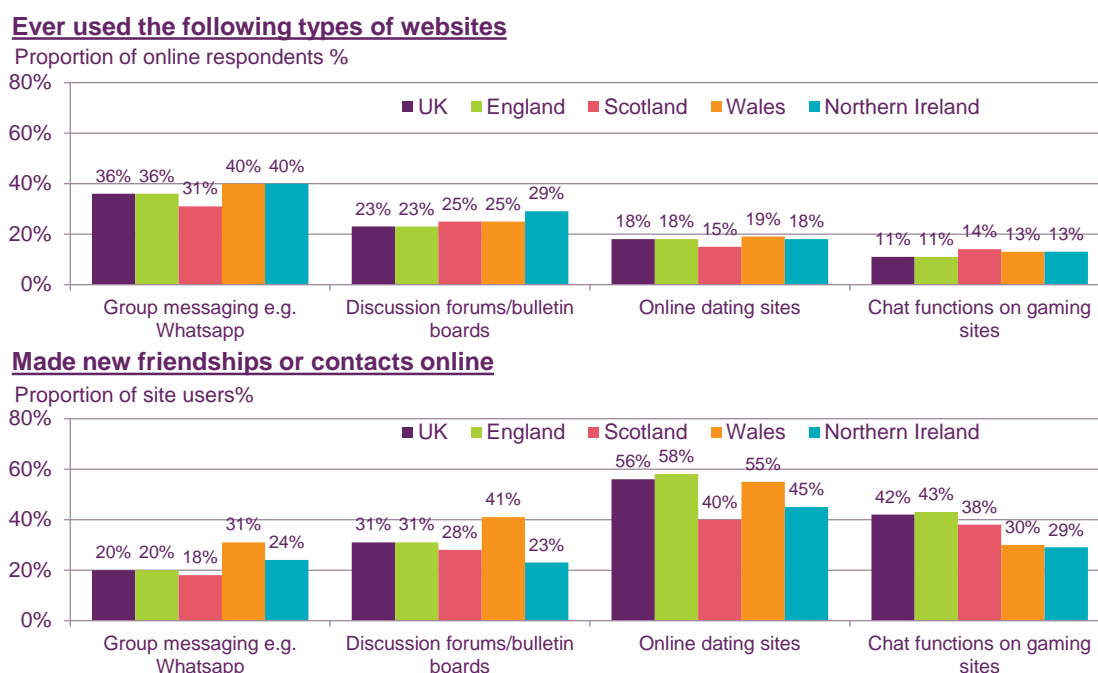
Much of the social media discussed in this section is one-way; that is, it is simply a user posting or creating information that another user can choose to read or view. However, some activities can facilitate introductions between people, enabling them to form new contacts or even friendships.

Figure 1.9 shows the extent to which people use different types of social media, alongside whether they have formed new relationships via these types of sites.

Off the four types of site covered in the survey, messaging platforms such as WhatsApp and Snapchat are used commonly (40% of online adults use these types of site in Wales), followed by discussion forums and bulletin boards (25%), and dating websites (19%). Chat functions within gaming websites (13%) have the lowest reach, used by around one in eight online adults in Wales.

Among the 19% of online adults in Wales who claim to have used dating websites, 55% have made new friendships. Discussion forums and bulletin boards are also a popular way for people to make new contacts, with over two-fifths (41%) of users in Wales claiming to have met new people this way. Around one in three online adult users of these sites in Wales have also met new people on group messaging platforms (31%) and via chat functions in gaming websites (30%).

**Figure 1.9 Use of different online activities to make new contacts**



Source: Ofcom research, 'Connected Devices', May 2015  
 Base: All online adults aged 16+ and all website users aged 16+.  
 Q70. And have you ever used the following types of site?  
 Q70a. And have you ever made new friendships or contacts online?

## 1.3 Social networking

### Introduction

Ofcom conducted a survey among internet users to investigate social media use and attitudes towards it. The data are sourced from the same questionnaire as covered in the previous section on personal communication networks<sup>6</sup>.

This section looks at Wales. It is worth noting that there are no significant differences between Wales and the other nations, so the story is consistent with the other nations throughout<sup>7</sup>. All figures reported in the narrative relate to Wales unless stated otherwise.

### Use of social networking sites

In terms of reach, Facebook is the most extensively-used social media site, followed by YouTube

According to Ofcom's Media Literacy study, in terms of reach, Facebook is the most popular social media brand, with 97% of adults with a social media profile using the site<sup>8</sup>. The online

<sup>6</sup> The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.

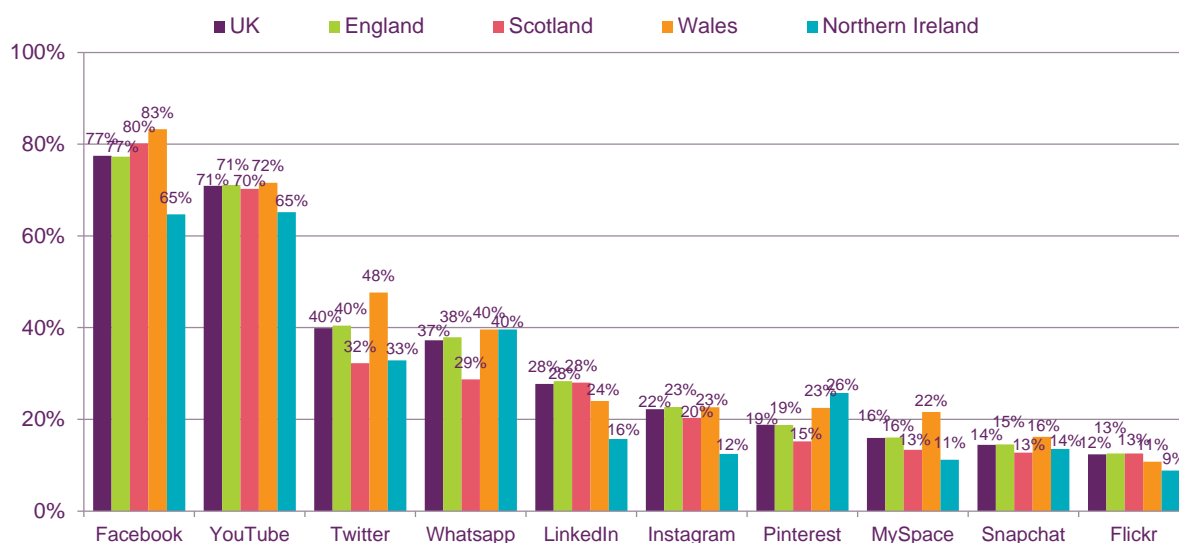
<sup>7</sup> Due to low base sizes, the confidence with which the population average can be estimated within nation is limited. This means that only large differences between nations (between 8% and 18%) can be reported as significantly different at 95% confidence. No differences between nations are significant when these margins of confidence are applied.

research findings support this high use of Facebook, with over eight in ten (83%) online adults in Wales claiming to have ever used Facebook, when prompted with a list of websites. YouTube follows quite closely, with 72% of online users in Wales having ‘ever’ used it. Twitter (48%) and WhatsApp (40%) are also used by an increasing number of people in Wales.

Video- and photo-based communications such as Instagram, Pinterest and Snapchat are becoming increasingly popular

A quarter of online users in Wales have used Instagram (23%) and Pinterest (23%). A further one in six have used Snapchat (16%) and one in ten Flickr (11%).

**Figure 1.10 Websites and apps ever used, by nation: top 10 responses**



Source: Ofcom research, ‘Connected Devices’, May 2015

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

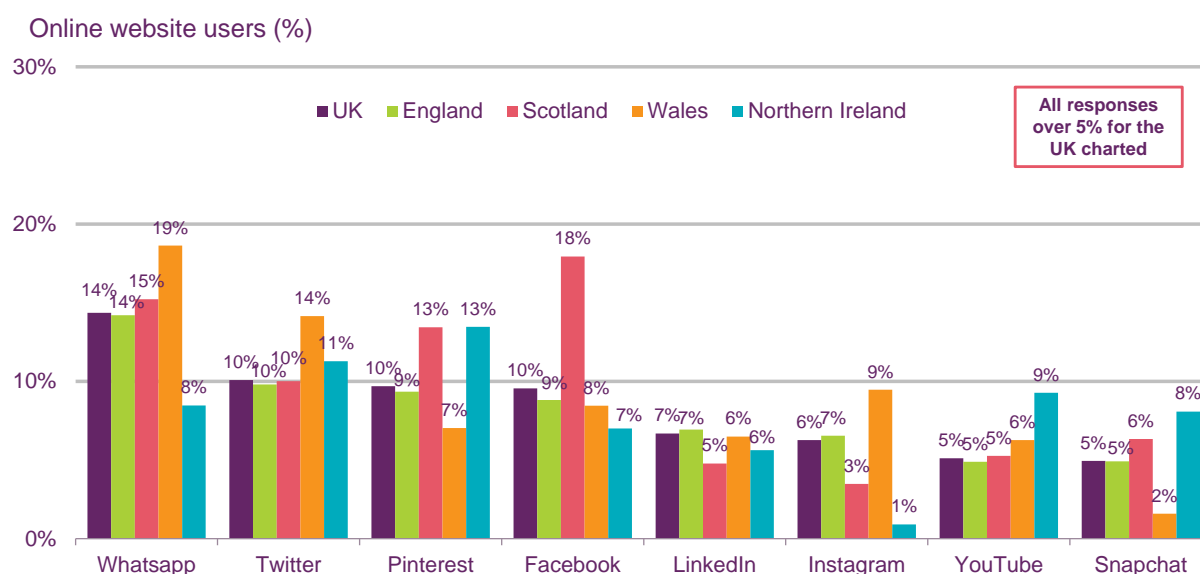
Q60. Which of the following websites have you ever used? (Top ten responses shown)

WhatsApp, Pinterest and Instagram feature as recent additions for some online users in Wales

As a method of identifying recent trends in website and app use, a question was asked regarding people’s most recent addition. These are signs of the emergence of newer image- and photo-based websites in the responses to this question. Among those who claim to use any of the social networking/communication portals with which they were prompted (see Figure 1.11) WhatsApp was cited by 19% of website users as ‘the most recent addition’. Twitter was also cited as a recent addition for one in seven (14%). Instagram (9%) and Pinterest (7%) also feature as a new addition for some.

<sup>8</sup> <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/>. Page 38.

**Figure 1.11 Site or app most recently added**



Source: Ofcom research, 'Connected Devices', May 2015

Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).

Q61d. Which one is your most recent addition?

Chart includes data for all responses 5% or over.

### Two in five Welsh adults who take digital photos say they share them on social media

The use of photo and image based sites is also supported by Ofcom research into how people take and share photos<sup>9</sup>. Over three quarters (76%) of adults in Wales take digital photos and the mobile phone is the device most often used for this: 57% of Welsh adults have ever taken photos with a mobile phone and 46% say this is the device they use most often.

Two in five (41%) Welsh adults who take digital photos say they share their photos using social media. Many of these are likely to be selfies. Over a quarter (27%) of people in Wales say they have ever taken a selfie and one in ten (10%) say they take selfies at least once a week.

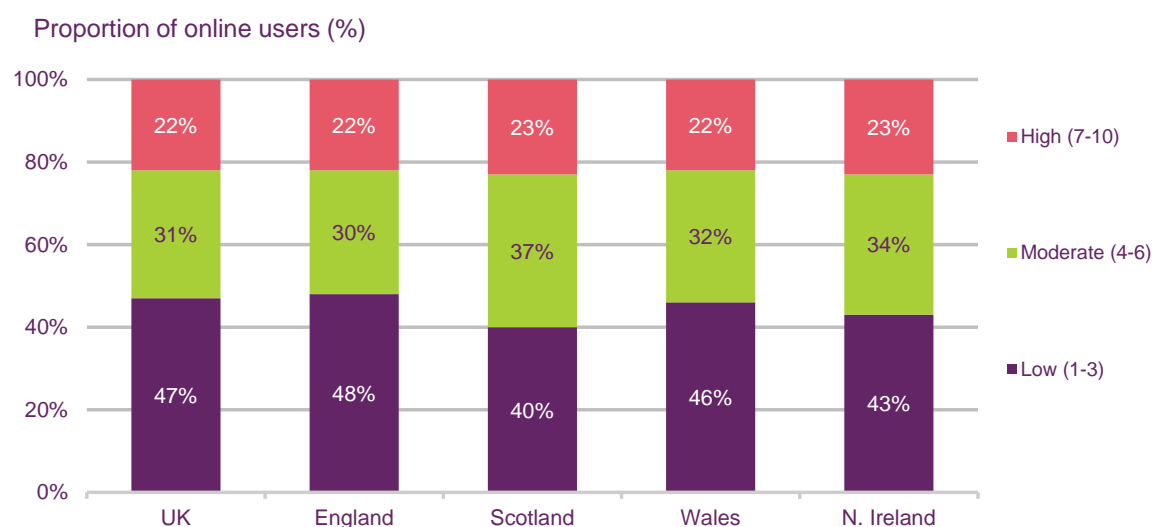
### **Attitudes to social media**

#### Over one in five people say that they are 'hooked' on social media

In order to understand the extent to which social media is a part of people's lives, we asked people to indicate a number on a scale where 1 equated to 'I'm not at all hooked on social media' up to 10, 'I'm completely hooked on social media'. Overall, just over one in five adults (22%) in Wales indicated a rating of between 7-10 (see Figure 1.12), suggesting that these people perceive themselves to be 'hooked on social media'. A similar and consistent pattern is seen across all the nations.

<sup>9</sup> Findings taken from the Kantar Media Omnibus, a Face to Face survey commissioned by Ofcom and representative of all UK adults.

**Figure 1.12 Extent to which people are ‘hooked’ on social media, by nation**



Source: Ofcom research, ‘Connected Devices’, May 2015

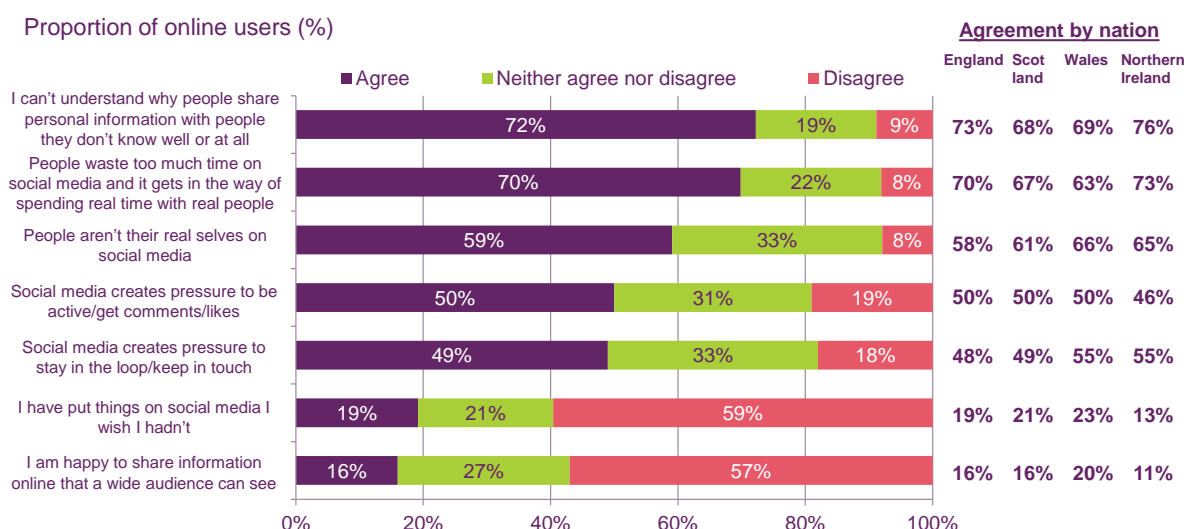
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q91. If you had to choose a number between 1 and 10, where 1 represented ‘I’m not at all hooked on social media’ and 10 represented ‘I’m completely hooked on social media’, which number would you choose for yourself?

One in five have posted things online they wish they hadn’t

There are concerns about privacy in relation to social media use; Figure 1.13 shows that almost seven in ten adults in Wales (69%) agree that they ‘can’t understand why people share personal information with people they don’t know well or at all’. A similar proportion of people (63%) in Wales also agree that ‘people waste too much time on social media’. Twenty-three per cent of adults in Wales have put things online they wish they hadn’t.

**Figure 1.13 Level of agreement with statements about social media**



Source: Ofcom research, ‘Connected Devices’, May 2015

Base: All online adults 16+ =2290

Q90 How much do you agree or disagree with the following statements regarding social media?

## 1.4 Changes in audio-visual consumption in Wales

### **Broadcast TV viewing**

BARB analysis is based on viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPGs) on TV sets. 'Broadcast TV viewing' refers to TV programmes watched on the TV set live at the time of broadcast (traditional TV viewing), recordings of these programmes or viewing of these programmes through catch-up player services (referred to as time-shifted), up to seven days after they were televised.

### **Traditional TV viewing**

Traditional TV viewing refers to TV programmes watched live at the time of broadcast on the TV set.

### **Non-traditional TV viewing**

Non-traditional TV viewing refers to TV programmes that are not watched live at the time of broadcast. This includes viewing of TV programmes through digital video recorders, catch-up services, on-demand subscription services and pay-per-view services.

### **People in Wales watched 12 minutes less broadcast television per day in 2014 than in 2013 (4 hours 11 minutes)**

The average individual in Wales watched 4 hours 11 minutes of broadcast TV a day in 2014<sup>10</sup>; 12 minutes less per day than in 2013 (Figure 1.14)<sup>11</sup>. This is the most marked fall in annual TV viewing minutes in Wales since 2010. Despite this, individuals in Wales still watch significantly more television on average than those in Scotland (3 hours 59 minutes), Northern Ireland (3 hours 47 minutes) and the UK as a whole (3 hours 40 minutes).

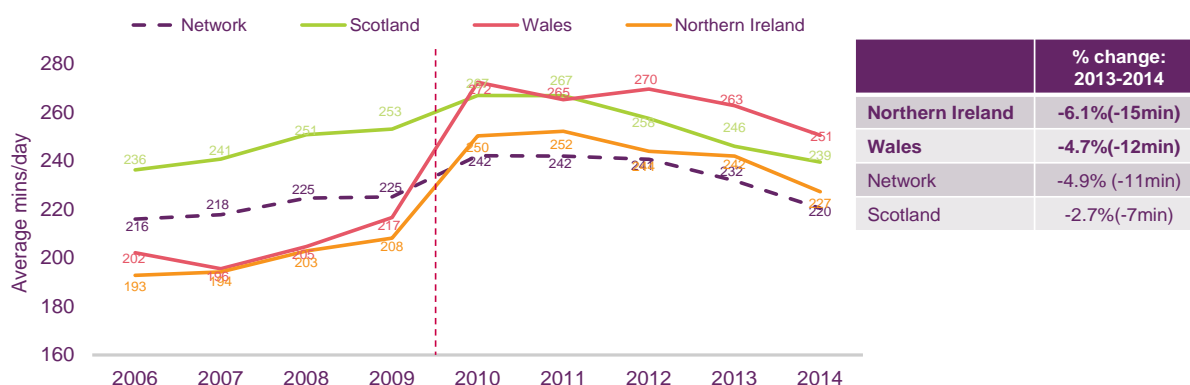
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<sup>10</sup> When analysing BARB data we refer to viewing of programmes at the time of broadcast (live), any recordings of these programmes and if watched through a broadcaster catch-up service (eg BBC iPlayer) up to seven days afterwards.

<sup>11</sup> The rise in viewing seen in Figure 1.14 and Figure 1.15 between 2009-2010 across some ITV regions such as Wales, North East, and Border may be linked to specific regional BARB panel changes that occurred when the new BARB panel was introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

**Figure 1.14 Average minutes of television viewing per day, by nation: all homes**

Average minutes of viewing/day by TV region: Total TV, Individuals 4+



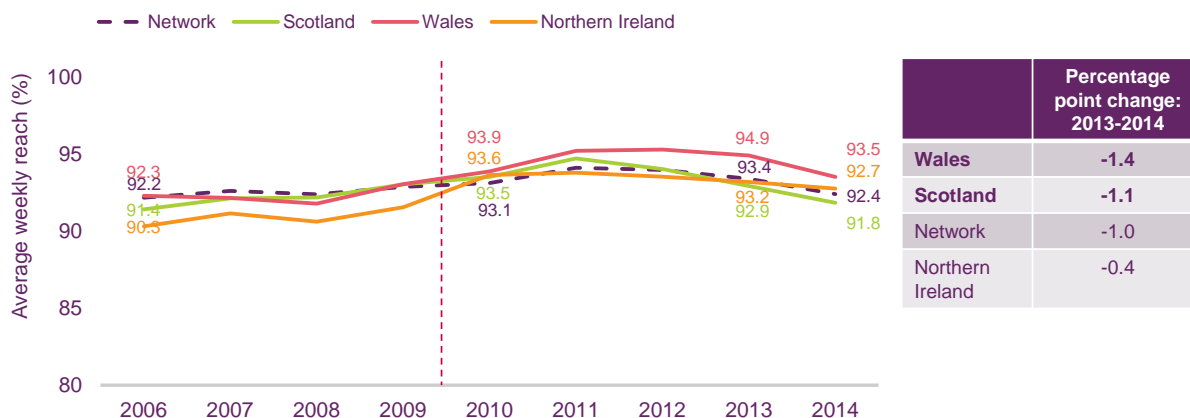
Source: BARB. Note: New BARB panel introduced 1 January 2010. As a result pre and post panel change data must be treated with caution (see dotted line). Note: Year-on-year percentage changes are calculated on data to two decimal places.

Over nine in ten individuals (93.5%) in Wales watched TV every week in 2014; 1.4 percentage points less than in 2013

In each of the nations and the UK as a whole, the proportion of individuals who watched TV in an average week was over 90%. (Figure 1.15). Year on year, average weekly reach fell in all nations, dipping the most in Wales (by 1.4 percentage points). Despite this, Wales maintains the highest average weekly reach compared to the other devolved nations and the UK as a whole, and has done so since 2010.

**Figure 1.15 Average weekly reach of total TV, by nation**

Average weekly reach by TV region: Total TV, Individuals 4+ (15 min+)



Source: BARB. Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Almost half of all adults in Wales used catch-up services such as iPlayer, ITV Player and All 4 in 2015; 8 percentage points higher than in 2014

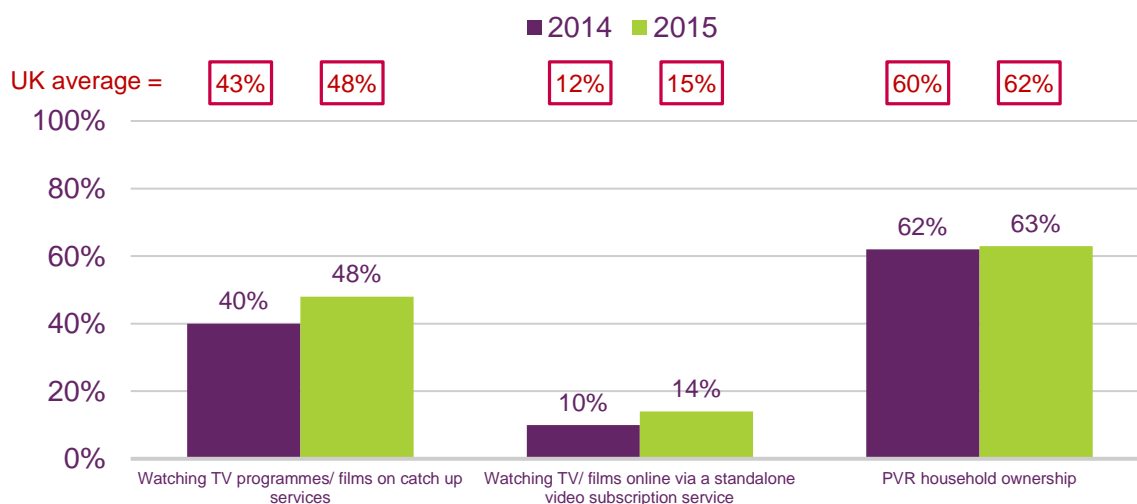
Figure 1.16 shows the year on year change in the use of ‘non-traditional TV viewing’ methods in Wales from the *Ofcom Technology Tracker*. The three methods covered are:



catch-up services (e.g. iPlayer, ITV Player, All 4), standalone video subscription services (e.g. Netflix, Amazon Instant) and personal video recorders (PVRs).

Of all adults in Wales, 48% said they had used catch-up services in 2015, an increase of 8 percentage points since the same time in 2014. This is in-line with catch-up usage in Scotland (49%) and the UK as a whole (48%), and higher than in Northern Ireland (32%). Use of both standalone video subscription services and PVRs are similar to the UK average.

**Figure 1.16 Use of catch-up, standalone video subscription and PVRs in Wales**



Source: Ofcom Technology Tracker, W1 2015

Base: All adults aged 16+ (UK 2014 = 3740, Wales 2014 = 491; UK 2015 = 3756, Wales 2015 = 496)  
 QH17 (QH46): Thinking about your personal use of TV programmes and films online and on demand services that you may use on any device (e.g. smartphone, TV set, tablet or laptop) anywhere, which of the following, if any, have you personally ever used? QR1A-B: Does your household have Sky+/ Virgin TiVo or V+? QR1C-E: Does your Freesat set top box/ Freeview box or Freeview TV set / broadband TV service allow you to record and store TV programmes, and also pause and rewind live TV programmes? QR1F-G: Do you have a YouView/ Now TV set top box?

### Consumer research on the decline in traditional TV viewing

In order to better understand the decline in traditional TV viewing<sup>12</sup>, identified through the previous BARB analysis, Ofcom commissioned omnibus research in April 2015. The research was carried out by Gfk NOP among 1,878 UK adults aged 16 years and over, with additional boost interviews in Northern Ireland to allow individual nations' reporting<sup>13</sup>. The research resulted in 163 interviews in Scotland, 99 interviews in Wales and 110 interviews in Northern Ireland<sup>14</sup>.

<sup>12</sup> Traditional TV viewing refers to TV programmes watched live at the time of broadcast on the TV set.

<sup>13</sup> Only a boost in Northern Ireland was needed, as sample sizes in the other nations were sufficient in the main sample.

<sup>14</sup> The Northern Ireland boost interviews and main interviews are reported together as a sample within the nations CMR, but the Northern Ireland boost interviews are not included in the overall UK sample.

The research asked consumers to identify which audio-visual related activities they were doing more or less of, compared to a year ago<sup>15</sup>. The purpose of this was to provide a view of changes in behaviour across different features e.g. screen used (TV vs. other), location of viewing (in home vs. out and about), traditional or non-traditional (e.g. at time of broadcast vs. catch-up, personally recorded, subscription on-demand or pay-per-view), and content viewed (e.g. programmes from BBC/ ITV/ UTV/ STV/ Channel 4 or Five, short clips, box sets/series, films). As abbreviations are used in this section, the full question wording and list of activities asked about are shown at the end of the section.

Research found increases in use of non-traditional viewing methods: non-subscription catch-up, watching recorded content and subscription on-demand services.

Figure 1.17 shows claimed changes in specific audio-visual activities among respondents in the nations and the UK as a whole, while Figure 1.18 shows the broader findings for Wales in more detail.

In the UK overall, the research identified claimed decreases in traditional TV viewing (that is, viewing 'at the time of broadcast') and also viewing 'via the TV set' over the past year. In parallel, respondents claimed to have increased their 'non-traditional' TV viewing, i.e. net gains were found for watching non-subscription catch-up, watching content they had personally recorded, and using subscription on-demand services (see Figure 1.17).

Respondents in Wales also indicated that overall they were doing less traditional TV viewing. Eight per cent said they watching more at the time of broadcast in April 2015 than in the previous year, while 27% said they were doing this less, resulting in a net change of -19%.

Claimed increases in 'non-traditional' TV viewing were also found in Wales. Net gains were +40% for watching non-subscription catch-up, +18% for watching content they had personally recorded and +13% of respondents saying they used subscription on-demand services.

As context to the findings above, it is worth noting that claimed decreases in traditional TV viewing (i.e. viewing at time of broadcast), viewing via TV set and viewing PSB TV were lower than the decreases noted for watching DVDs (net loss of -30% in Wales) and going to the cinema (-35% in Wales) over the same time period (see Figure 1.18). This mirrors the findings in the UK overall.

Wales differed from the overall trends in the UK in terms of changes in watching via specific screens, and in the location of viewing. In the UK overall, respondents were more likely to say that they watched content via a TV set less than they did a year ago, while in Wales, 29% said they watched via the TV set more, and 14% said they did this less (therefore the net change was +15%)<sup>16</sup>.

In the UK overall, there was little reported change in the location of viewing, but respondents in Wales were more likely to say that they were watching both in the home (net change of +12%) and outside the home (+7%) more than they did a year ago.

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<sup>15</sup> The research identified respondents' own views on changes in their viewing and related behaviours, but it does not indicate the *volume* of change, e.g. minutes of viewing increased or decreased.

<sup>16</sup> It should be noted that the research is based on self-reported data and identifies respondents' own views on changes in their viewing and related behaviour. This report does not contain other data that confirms this self-reported increase in viewing via the TV set in Wales in 2015.

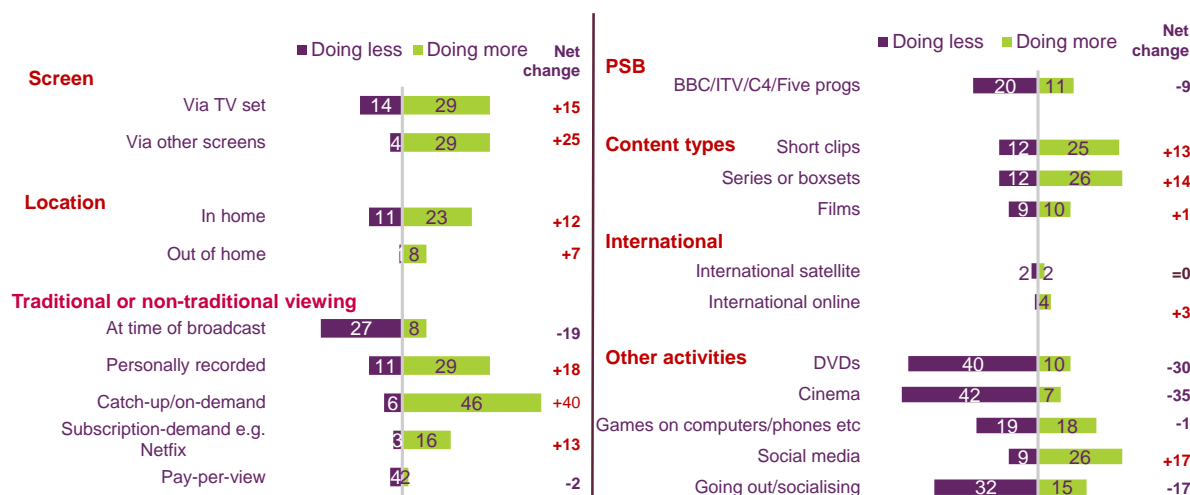
**Figure 1.17 Claimed changes in key audio-visual activities over the past year (%), by nation**

		Net change				
		UK (1878)	England (1568)	Scotland (163)	Wales (99)	Northern Ireland (110)
Screen	Watching via TV set	-7%	-7%	-6%	+15%	-10%
	Watching via other screens	+13%	+13%	+16%	+25%	+23%
Location of viewing	In home	0	-2%	+6%	+12%	+2%
	Out of home	-4%	-6%	0	+7%	+7%
Traditional or non-traditional viewing	At time of broadcast	-19%	-17%	-34%	-19%	-25%
	Personally recorded	+13%	+11%	+24%	+18%	+32%
	Catch-up/on-demand	+26%	+23%	+36%	+40%	+39%
	Subscription-demand e.g. Netflix	+8%	+7%	+15%	+13%	+22%
	Pay-per-view	-3%	-3%	-3%	-2%	+4%
Public Service Broadcasting	Watching BBC, ITV/STV/UTV, C4, Five programmes	-6%	-5%	-3%	-9%	-28%

Source: GfK NOP omnibus, April 2015. Base: All adults (1878). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago? This reports the 'net gain' or 'net loss' for an activity. For example, if 20% of respondents said they did an activity more and 5% said they did an activity less, the net gain would be +15% doing the activity more.

**Figure 1.18 Claimed changes in activities over the past year (%), Wales**

Claimed changes in viewing over last year (%)



Source: GfK NOP omnibus, April 2015. Base: All adults 16+ in Wales (99). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now, compared to a year ago?

## Ofcom omnibus: research question wording

For each of the following activities I read out can you say whether you are doing this more, the same amount or less now compared to a year ago? If you have never done the activity at all, please just tell me. INTERVIEWER: READ OUT EACH STATEMENT INDIVIDUALLY. SINGLE CODE FOR EACH STATEMENT

### Screen

- Using a TV set to watch any programmes/films/clips i.e. watching any programmes/films/clips using any service (e.g. Freeview, Sky, Netflix, BBC iplayer, via a games console etc)
- Using other screens to watch any programmes/films/clips e.g. home computers, tablets, smartphones (rather than the TV set)

### Location

- Watching any TV, clip, programme when in your own home (watching could be on any screen e.g. TV, home computers, tablets, smartphones)
- Watching any TV, clip, programme when out and about (watching could be on any screen e.g. TVs, computers, tablets, smartphones)

### Traditional or non-traditional viewing

- Watching TV programmes as they are broadcast on TV (e.g. watching EastEnders when it is shown on BBC1 at 7.30pm or watching Game of Thrones at 9pm on Sky Atlantic when it is broadcast)
- Watching TV that you have personally recorded, i.e. after recording it onto a set-top box, or PVR
- Watching any 'catch-up' or on-demand TV where you watch programmes/films that have been shown on TV recently (via services like BBC iplayer, itv player, 4OD, SkyGo, Virgin Catch-up etc).
- Watching programmes/films through on-demand services that you pay a monthly subscription for like Netflix, Amazon Prime, Now TV etc
- Paying to watch individual programmes/films e.g. films through Sky's Box Office service or 'Pay per movie' with Virgin Movies

### PSB

- Watching BBC, ITV/STV/UTV, Channel 4 or Five programmes in particular (through any channel, any screen and at any time)

### Content

- Watching short clips e.g. like those found on Youtube, or linked on social media like Facebook
- Watching series or boxsets in any way, e.g. on TV, tablets, DVDs, Netflix etc
- Watching films (through any service, e.g. Netflix, Now TV, DVDs on either your TV set, computers or smartphones)

### International

- Watching international channels via satellite services from other countries e.g. Hotbird, Turksat, Hellas Sat), Hispasat, Canal+, Cyfra.
- Watching programmes/films through international online video services from other countries, e.g. RTÉ Player, Hulu, My TF1, nc+

### Other activities

- Watching DVDs
- Going to the cinema to watch films
- Playing games on a console, computer, tablet or smartphone etc
- Using social media e.g. Facebook, etc
- Going out and socialising

## 1.5 Analysis of communications services in Aberystwyth, Cardiff, Newport, Swansea and Wrexham

### Introduction

Ofcom has commissioned research data from the British Population Survey (BPS) to explore communications services at a more granular level in Wales. The Welsh towns and cities that are included are Cardiff, Swansea, Newport, Aberystwyth and Wrexham. These cities will be compared to each other and to Wales as a whole with regard to take-up of landline, mobile phones and internet services.

### Methodology

The BPS asks consumers in Great Britain about communications services; it comprises around 2,000 face-to-face, in-home interviews with adults (aged 15+) every week, allowing detailed regional and sub-demographic analysis.

Using data from the BPS (January 2014 to March 2015), analysis was undertaken on Aberystwyth, Cardiff, Newport, Swansea and Wrexham. The definition of each city is the area which is subject to the city council. For smaller towns, the boundary is defined as all individuals living in a postcode covered by that town and which is also classed as an urban area. For example, Wrexham is defined as all urban postcodes in LL11-LL14.

The bases for the cities and towns in Wales as a whole were as follows: Wales 4812; Cardiff 183; Swansea 208; Newport 292; Wrexham 201 and Aberystwyth 146. The BPS does not seek to be representative at very low levels, and samples from a particular town or city may not match the exact profile of that town. In Aberystwyth, 47% of the sample were students, as this town has a large university. The analysis was repeated excluding students, to try to

better represent the town as a whole. Where the presence of students makes a significant difference to Aberystwyth's results, this will be noted.

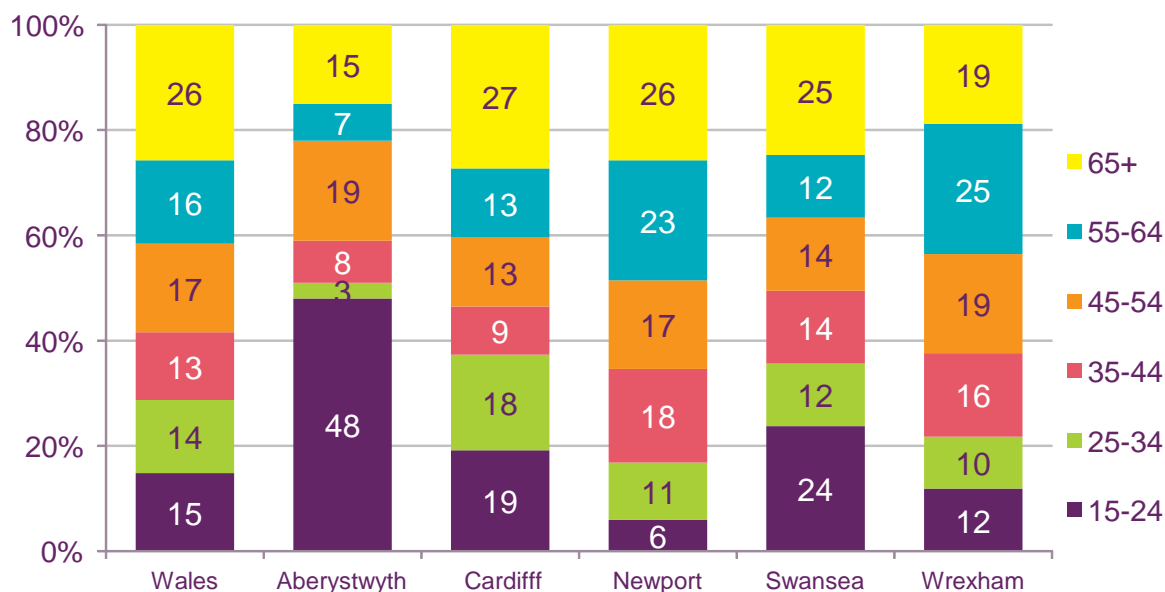
These cities were selected partly in order to include cities across North and South Wales and partly because analysis is limited to those areas where the BPS has a sufficiently large sample.

The BPS uses a different methodology to Ofcom's *Technology Tracker*, in that quotas and question wordings are different. Therefore, discrepancies between the BPS and Ofcom's quoted figures are not unexpected or of concern. The BPS questions also differ from Ofcom's in their terminology; e.g. using 'web-enabled phone' rather than 'smartphone'.

### Profile of Wales as a whole and each of the towns and cities in the analysis

The samples in Swansea and Aberystwyth have a significantly younger profile than the other cities, and than Wales as a whole (Figure 1.19). In Aberystwyth, this is due to high student population. Newport and Wrexham have an older population profile; 66% and 63% of their populations respectively are aged 45+, compared to 59% of Wales as a whole.

**Figure 1.19 Age profiles of Wales, Aberystwyth, Cardiff, Newport, Swansea and Wrexham**

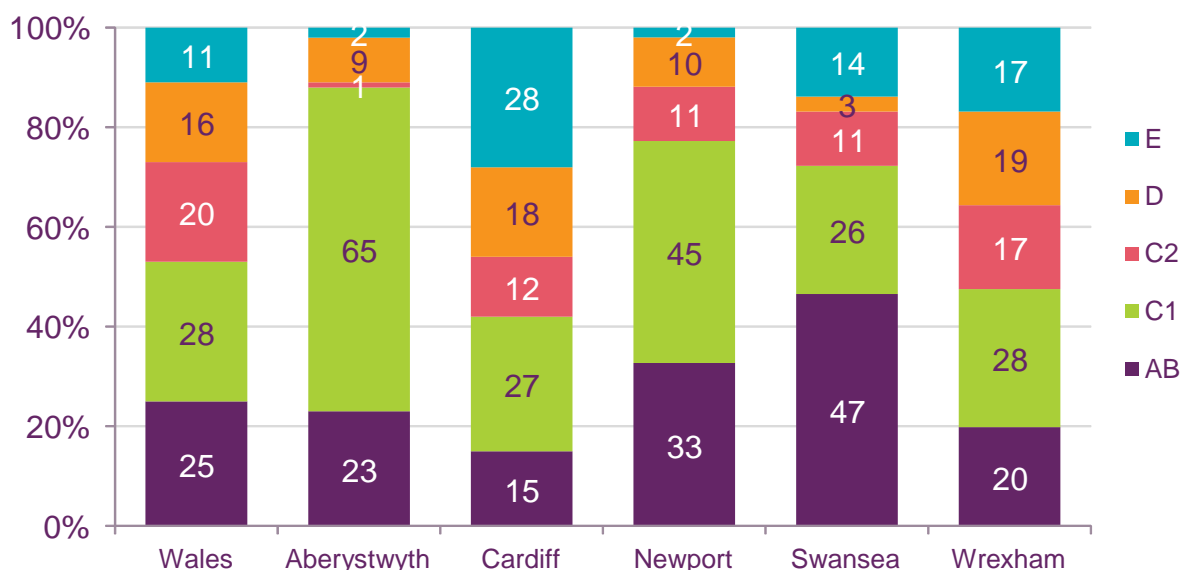


Source: British Population Survey

Base: All adults 15+ (Wales 5287, Aberystwyth 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Due to the presence of the university, Aberystwyth has a higher proportion of people in the C1 socio-economic group, as full-time students fall into this group (Figure 1.20). Cardiff has the most deprived of the samples under consideration, with 46% in socio-economic groups DE. Swansea and Newport are the most affluent samples, with 73% and 78% respectively in socio-economic groups ABC1.

**Figure 1.20 Socio-economic profiles of Wales, Aberystwyth, Cardiff, Newport, Swansea and Wrexham**



Source: British Population Survey

Base: All adults 15+ (Wales 5287, Aberystwyth 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

### Other demographic differences

Cardiff has a higher level of unemployment than the other cities, and Wales as a whole. Thirty-six per cent of the sample in Newport is retired, compared to the Wales average of 30%. Cardiff is the most ethnically diverse of the cities, with 16% of respondents classifying themselves as an ethnic minority, compared to 2% across Wales as a whole.

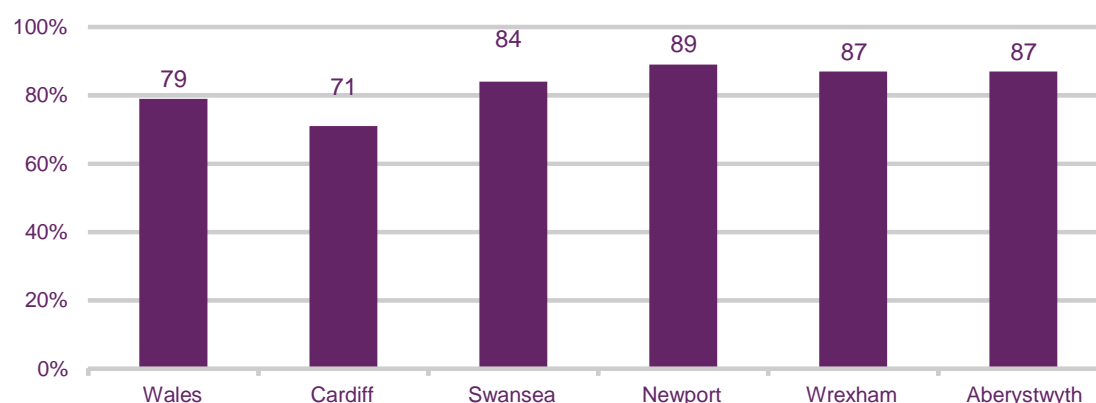
Both Cardiff and Aberystwyth have large universities, and their samples have significantly more students than the Welsh average (12% for Cardiff and 47% for Aberystwyth). Perhaps as a result, both these cities have above-average numbers (21% and 44% respectively) of respondents living in privately rented accommodation. Wrexham (28%) and Cardiff (31%) have above the Welsh average numbers (17%) of people living in council or housing association properties.

Being aware of these differences between the cities is useful, as take-up and use of communications services is affected by individuals' age, affluence, education level and life stage. We will be mindful of this when exploring differences in take-up and use between the cities.

### Cardiff has lower take-up than other cities of landline and mobile services

Across Wales, 79% of individuals live in a household with a landline (Figure 1.21). Cardiff respondents are the least likely to have a landline (71%); those living in the other cities are more likely than the Welsh average to have one. This excludes students in Aberystwyth; if these are included, only 62% of people in Aberystwyth have a landline.

**Figure 1.21 Take-up of landline services in Welsh towns and cities**



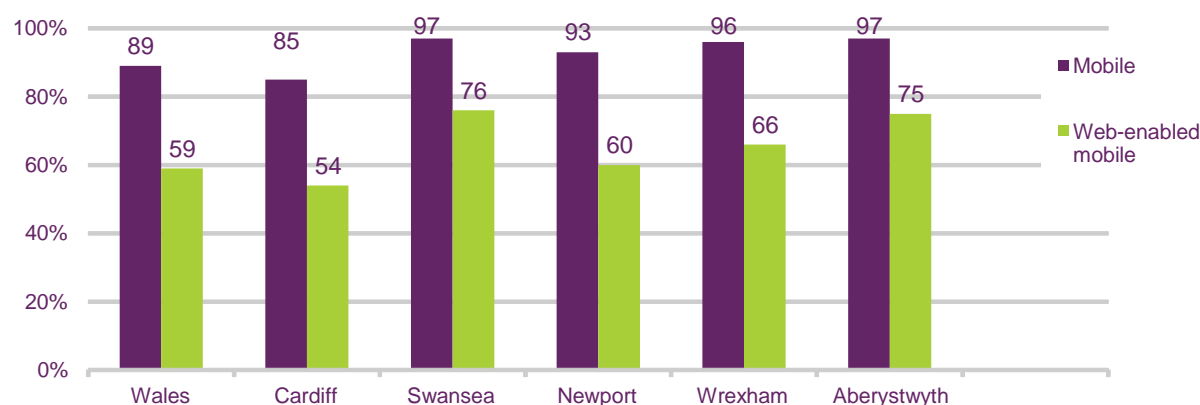
Source: British Population Survey

Base: All adults 15+ (Wales 5287, Aberystwyth 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Q: Do you have a landline telephone?

With the exception of Cardiff, take-up of any type of mobile phone is higher in all towns and cities than the Welsh average (Figure 1.22). Web-enabled mobiles are more common in Newport (76%) and Aberystwyth (75%) than in the other cities or Wales as a whole (59%). The high take-up in Aberystwyth is driven by the student population.

**Figure 1.22 Take-up of mobile telephony services in towns and cities in Wales**



Source: British Population Survey

Base: All adults 15+ (Wales 5287, Aberystwyth 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Q: Do you have a mobile telephone?

Q: Do you have a web-enabled phone?

### Take-up of Freesat is more common in North Wales

Over nine in ten (94%) of the Welsh population have access to a television in the household (Figure 1.23). Significantly more people in Swansea (96%) and Wrexham (99%) have a TV in the household.

Cardiff and Aberystwyth (excluding students) have below-average take-up of pay-TV services (47% and 27%). Swansea and Wrexham have an above-average presence of at least one TV with Freeview or Freesat in the household (70% for both). Free satellite

services are more common in the North Wales cities of Wrexham (10%) and Aberystwyth (8%), which reflects the fact that DTV coverage can be limited there<sup>17</sup>.

**Figure 1.23 Take-up of TV services in towns and cities in Wales**



Source: British Population Survey

Base: All adults 15+ (Wales 5287, Aberystwyth 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Q: Is there a TV in the household?

Q: Does your household have satellite/cable/Freeview or Freesat TV?

### Access to cable broadband is limited in North Wales

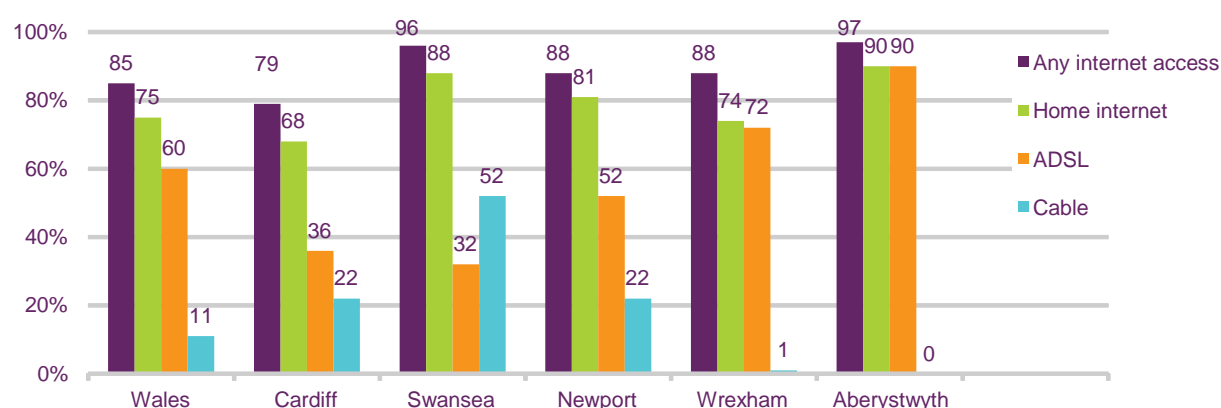
Over four-fifths (85%) of the population in Wales have some type of access to the internet. Internet access is most common in Swansea (96%) and Aberystwyth (97%), and least common in Cardiff (79%). Seventy per cent of individuals in Wales have internet access at home, although this is most common in Swansea (88%).

Cable coverage is available mainly in South Wales. Between 22% and 52% of households in the South Wales cities of Cardiff, Newport and Swansea have cable broadband. However, this is lower in Wrexham (1%), with no cable broadband reported in Aberystwyth. In areas where cable is not present, broadband via xDSL is the only alternative (this includes broadband over ADSL and fibre services).

<sup>17</sup> <http://maps.ofcom.org.uk/dtt/> for DTV coverage



**Figure 1.24 Take-up of internet services in towns and cities in Wales**



Source: British Population Survey

Base: All adults 15+ (Wales 5287, Aberystwyth, 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Q: Which of these best describes how frequently you use the internet?

Q. And how do you access the internet?

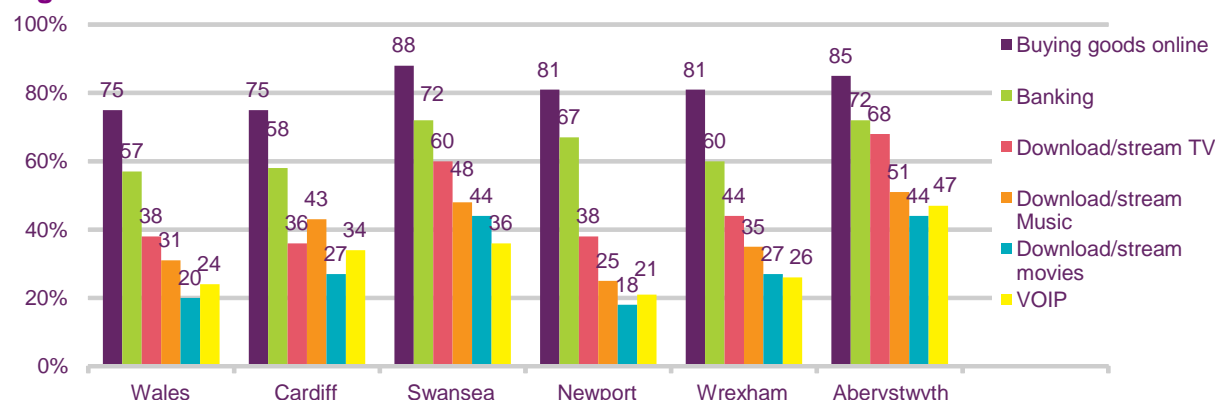
Q. Is your access to the internet at home: cable broadband, ADSL broadband, have broadband access but don't know type?

**Online transactional services, such as banking, are less common in Cardiff than in the other towns and cities**

Using the internet for transactions (purchasing goods and banking) is more common in Swansea, Newport and Aberystwyth than across Wales as a whole (Figure 1.25). In Cardiff, Swansea and Aberystwyth, people are significantly more likely to make use of VoIP services.

People in Swansea are more likely to download any form of content (TV, film and music) than those in the rest of Wales. If students are included in Aberystwyth, higher levels of downloading music, film and TV are reported there. If students are excluded, the Aberystwyth results show that people are more likely than those in the rest of Wales to download TV, but not music or film. Respondents from Cardiff are more likely than those in Wales as a whole to download music and film.

**Figure 1.25 Use of Internet services in towns and cities in Wales**



Source: British Population Survey

Base: All adults 15+ with internet access (Wales 3460, Aberystwyth, 137, Cardiff 139, Newport 225, Swansea 161 and Wrexham 175)

Q: Which of the following have you done in the last three months?

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

### Introduction

From Ofcom's *Technology Tracker* survey (January-February 2015), we have undertaken some analysis of those who are able to speak or write Welsh (fluent and non-fluent), looking at their take-up of key communications services and devices.

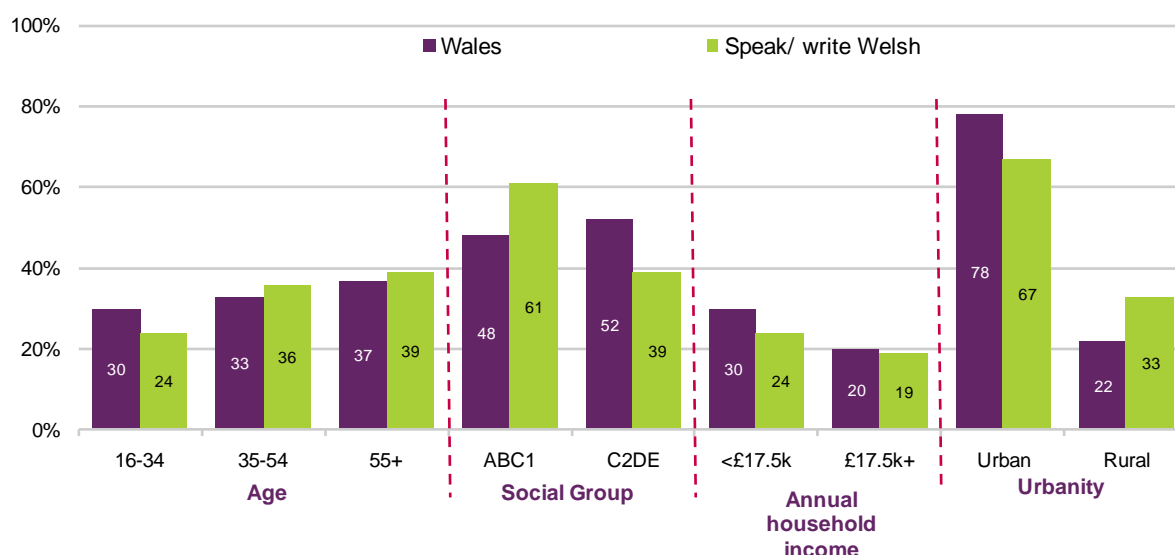
Figure 1.26 shows the demographic profile of those who can speak or write Welsh, and compares them to the Welsh sample as a whole. Following this, Figure 1.27 shows the take-up of key communications services and devices among adults in this sub-group.

#### A note on survey research

Please note that due to low base sizes, all findings are indicative and should therefore be treated with caution. The *Technology Tracker* sample in Wales was designed to be representative of the population of Wales as a whole, and is not therefore representative of those who speak and/or write Welsh.

Figure 1.26 compares those who can speak or write Welsh to all adults in Wales. In 2015, the annual household income of those who speak or write Welsh is comparable to all adults in Wales, and they are more likely than all adults in Wales to be in socio-economic groups ABC1 (61% vs. 48%). Welsh speakers/ writers are also more likely than all adults in Wales to live in rural areas (33% vs. 22%). They are also more likely to have an older demographic profile (24% aged 16-34 vs 39% aged 55+).

**Figure 1.26 Demographic profile of those who can speak or write Welsh**



Source: Ofcom *Technology Tracker*, Wave 1 2015

Base: All adults aged 16+ : 496 Wales, 138 speak or write Welsh (fluent and non-fluent)

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

Figure 1.27 shows that in 2015, those who speak or write Welsh are significantly more likely than all adults in Wales to have a landline at home (93% vs. 83%), or a DAB radio set at home (53% vs. 39%). However, these respondents are significantly less likely to have

internet access (through any means) at home (76% vs. 86%), and less likely to have smartphone-only internet access (2% vs. 7%).

As with the apparent increase for all adults in Wales since 2014, in 2015 those who speak or write Welsh are more likely to have a tablet computer (59% vs. 38% in 2014), and to have pay TV on their main TV set (70% vs. 54% in 2014). Although there has been no change since 2014 among all adults in Wales, those who speak or write Welsh are now more likely to own a DAB radio set (53% vs. 36% in 2014).

**Figure 1.27 Take- up of communications services and devices in Wales**

	Wales (total)	Respondents who speak or write Welsh
Fixed Line	83%	93% ↑
Mobile phone (personal use)	90%	85%
Smartphone (personal use)	63%	58%
Computer (any type)	84%	77%
Tablet computer in household	60%	59%
Total Internet	86%	76% ↓
Broadband (fixed and mobile)	78%	73%
Fixed broadband	77%	72%
Mobile internet	59%	55%
Smartphone internet access only	7%	2% ↓
DAB radio	39%	53% ↑
Pay TV on main set	69%	70%
Bundle	67%	67%

Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ : 496 Wales, 138 speak or write Welsh (fluent and non-fluent)

↑↓ Indicates significant increase/ decrease compared to Wales as a whole at the 95% confidence level.

Note: Mobile internet is access using a mobile phone or smartphone, through a WiFi network or the phone's mobile network.