



Communications Market Report: Wales

Research Document

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Introduction

This is Ofcom's 11th annual review of the Communications Market Report for Wales. The report gives an overview of the nation's communications markets, examining availability, take-up and consumption of the internet, telecommunications, broadcasting and postal services, and comparing the findings with the other nations and the UK as a whole.

More people in Wales are embracing faster mobile internet connections, and four in ten adults (44%) have a 4G mobile service, a significant growth of 21 percentage points since 2015. This is now in line with the UK overall at 48%, whereas last year Wales was below the UK average. Faster mobile internet connections are also more widely available, with 4G coverage reaching 90% of premises in Wales.

More than eight in ten households (84%) in Wales now have access to the internet, with 77% having access to fixed broadband. The Superfast Cymru programme, which has already connected more than 582,000 properties in every part of Wales, has been extended to 2017. This is deploying an increasing number of fibre-to-the-premises (FTTP) connections to properties that are too far from the nearest cabinet to benefit from the standard fibre-to-the-cabinet (FTTC) solution. Many premises in the harder-to-reach parts of Wales which have previously had nothing will be able to get speeds of up to 300Mbit/s.

Tablet computer take-up has also grown, and internet users in Wales are now more likely than those in the UK to say that a tablet is their most important device for going online. However, like the UK as a whole, the smartphone is considered the most important device for going online, replacing the laptop as the most important device in Wales for the past two years. Even so, smartphone ownership has remained unchanged, and is now lower than in the UK overall.

People in Wales spend less time online (at an average of 17.8 hours per week) than any other nation. General surfing of the web and browsing (80%) and sending and receiving email (75%) are the most common online activities for internet users in Wales.

Despite this, sending items in the post continues to be important for adults in Wales, with almost nine in ten saying they send at least one item of post each month. However, people in Wales reported more problems with delayed, lost and damaged mail than did respondents in any of the other nations of the UK.

Television viewing is still popular in Wales. The proportion of households with smart TVs has doubled in the past year, and individuals in Wales spend more time than the UK average in front of their television screens (4 hours 10 minutes per day). Broadcasters' spend on non-news and non-current affairs programming for the people of Wales has increased more than for any other UK nation over five years; up by 14% since 2015 and by 28% since 2010. The television set is the main source of UK and world news for respondents in Wales (58%).

In this year's report, we have continued our analysis of adults in Wales who speak or write Welsh (either fluent or non-fluent), looking at their take-up of key communications services and devices. We have also updated research last carried out in 2014 (the Digital Day), looking at how people engage with communications and media services.

The Digital Day research shows that people in Wales typically spend more time using media or communicating than they do sleeping (at 8 hours 33 minutes each day). The biggest change compared to 2014 has been the rise in instant messaging; nearly half of all adults (49%) now use these apps on a weekly basis. More people in Wales are now viewing paid on-demand content and spending less time watching DVDs than in 2014.

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Setting the scene

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

A note on our Technology Tracker survey research

We conducted a face-to-face survey of 3,737 respondents aged 16+ in the UK, with 489 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. Technology Tracker data in this report are cited as from 2016, with the fieldwork taking place in January and February of this year.

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.

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 dataset and charts are available in a searchable resource, which can be found at <http://www.ofcom.org.uk/cmrwales>. Companion reports for the UK and each of the nations can be found at www.ofcom.org.uk/cmwr.

1 Wales's communications market

1.1 Wales: fast facts

Figure 1.1 Fast facts for Wales

Nations' fast facts: H1 2016 (%) – 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	96	96	98	97	98	96	97	97	96
Pay digital TV	61	59	69 ⁺ +11	68 ⁺	71 ⁺ +8	62 ⁺ +3	54 ⁻	70	62
Free view-only TV	29	30	25 ⁻ -10	22 ⁻	23 ⁻	28 ⁻	35 ⁺	20	27
Smart TV take-up (among TV homes)	28 ⁺ +7	29 ⁺ +8	21 ⁻	33 ⁺ +16	18 ⁻	27 ⁺ +7	32 ⁺ +9	36 ⁺ +20	23 ⁻
HDTV service (among those with an HDTV)	79 ⁺ +4	79 ⁺ +4	79	77 ⁺ +8	80	80 ⁺ +6	75	78 ⁺ +11	74
DAB ownership (among radio listeners) ¹	50 ⁺ +7	52 ⁺ +8	36 ⁻	50	25 ⁻	49 ⁺ +7	53	52	43
Catch-up TV/ film viewing online/ on-demand (via any device, among those who use the internet)	58	59	60	59	44 ⁻	58	60	61 ⁺	49 ⁻
Total internet access at home (via any device)	86	87	84	84	83	86	87	84	82
Broadband take-up (at home)	81	81	79	79	78 ⁺ +6	80 ⁻	85 ⁺	80	77
Use mobile to access internet	66 ⁺ +5	66 ⁺ +4	63	61	69 ⁺ +9	66 ⁺ +4	61 ⁻	63 ⁺	53 ⁻
Mobile phone take-up (personal use)	93	94	91	91	92	93	94	90	94
Smartphone take-up (personal use)	71 ⁺ +5	71 ⁺ +4	70	65 ⁻	72 ⁺ +9	71 ⁺ +4	68 ⁺ +9	67	59
4G service take-up (among smartphone owners)	67 ⁺ +22	68 ⁺ +23	57 ⁻	68 ⁺ +32	77 ⁺ +37	69 ⁺ +23	55 ⁻ +20	72 ⁺ +34	49 ⁻ +21
Fixed landline take-up	86 ⁺ +2	86	86	85	86	85 ⁻	92 ⁺	85	84
Desktop PC take-up	31 ⁻ -3	32 ⁻ -5	23 ⁻	33	17 ⁻ -11	30 ⁻ -4	36 ⁺	32	36
Laptop take-up	64	65	60	61	56 ⁻	64	64	60	62
Tablet computer take-up	59 ⁺ +5	59 ⁺ +5	56	67 ⁺	60	58 ⁻ +4	64 ⁺ +9	69 ⁺	59 ⁻
E-reader take-up (personal use)	18	19	15	22	15	18 ⁻	25 ⁺	23	19

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural	Wales urban	Wales rural
Households taking bundles	68 +5	68 +4	69 +8	67	64	67 +4	72	68	64
Fixed telephony av availability	100	100	100	100	100				
Fixed broadband av availability ²	99.98	100	99.86	100	100				
LLU ADSL broadband av availability ³	95	96	90	93	90				
2G mobile av availability ⁴	99.6	99.7	99.1	98.4	98.8				
3G mobile av availability ⁵	99.6	99.8	97.9	98.6	99.4				
4G mobile av availability ⁶	97.8	98.8	92.0	90.1	99.3				
DTT av availability ⁷	98.5	98.6	98.7	97.8	97.4				
TV consumption (minutes per day) ⁸	216	219 **	240	250	225				
Radio consumption (minutes per day)	183	183	181	190	173				

Key: +Figure is significantly higher for nation than UK average or significantly higher for nation's urban/ rural than for nation's rural/ urban; -Figure is significantly lower for nation than UK average or significantly lower for nation's urban/ rural than for nation's rural/ urban; +xx Figures have risen significantly by xx percentage points since H1 2015; +xx Figures have decreased significantly by xx percentage points since H1 2015;

Source: Ofcom Technology Tracker H1 2016, BARB, RAJAR, industry data

Base: All adults aged 16+ (n = 3737 UK, 2239 England, 502 Scotland, 507 Northern Ireland, 489 Wales, 2711 UK urban, 1026 UK rural, 1958 England urban, 281 England rural, 251 Scotland urban, 251 Scotland rural, 240 Wales urban, 249 Wales rural, 262 Northern Ireland urban, 245 Northern Ireland rural)

1. DAB ownership in the nations and UK as reported here is sourced from Ofcom research. The UK CMR uses RAJAR data for DAB ownership
2. Proportion of premises connected to an ADSL-enabled BT local exchange based on BT data, December 2015
3. Proportion of premises connected to an LLU-enabled BT local exchange based on BT data, December 2015
4. Proportion of premises with outdoor 2G mobile coverage from at least one operator, May 2016
5. Proportion of premises with outdoor 3G mobile coverage from at least one operator, May 2016
6. Proportion of premises with outdoor 4G mobile coverage from at least one operator, May 2016
7. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom).
8. Based on calendar year 2015. **This figure reflects the average across the English regions with the highest in Border (243) and the lowest in London (197) respectively.

1.2 The Digital Day in Wales

Summary

Media and communications are a key part of our daily lives and we spend more time using them than we do sleeping. The amount of time that we spend using media and communications overall has changed little since 2014, but there have been some changes in the respective amounts of time that people in Wales are devoting to different services.

People in Wales are spending less time watching live TV; it's likely that they're substituting this with watching paid on-demand content, as time spent on this has grown by almost the same amount.

However, watching live TV still takes the lion's share of our time with media and communications. And watching TV¹ is a core part of our evening: between 8pm and 10pm each day, around nine in ten adults in Wales are watching a TV set. Traditional audio is also doing well in Wales – time spent listening to the radio has grown, while time spent with streamed music online (such as Spotify or Apple music) has fallen.

When it comes to communicating, instant messaging has grown in popularity since 2014 both in the proportion of people using instant messaging, and the amount of time spent on the services. While the proportion of people using social networks has remained stable, the amount of time spent on these services has declined.

Despite the growth in use of non-traditional means of communicating, phone calls are seen as the most important communication activity.

Background and methodology

This section provides an overview of the core results from our 2016 Digital Day study, drawing comparisons with data from when the study was last conducted in 2014. Further data are also available to access online via the dedicated website <http://stakeholders.ofcom.org.uk/market-data-research/other/cross-media/digital-day/2016/>

Although Ofcom makes use of a wide range of industry research to understand how people consume broadcast media and online content, there is little current insight into how people use all media and communications services and devices together, and how they form a central part of a consumer's day.

In Q1 2016, we conducted an in-depth quantitative diary study on UK adults' and children's² total media and communications activities to provide an overview of the role of media and communications in people's lives. The study was last conducted two years earlier, in 2014, so one of the primary aims was to gauge how things had changed since then. The study was therefore designed to remain as consistent as possible in terms of methodology (with some necessary tweaks and improvements).

The research provides a snapshot of media and communications behaviour over a seven-day period, exploring when and how people use services and devices throughout the day, covering both personal and business use, in- and out-of-home use.

A comprehensive description of the methodology is available in the technical appendix. This includes all questionnaire material, sample information and analysis definitions - http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/technical_appendix.pdf.

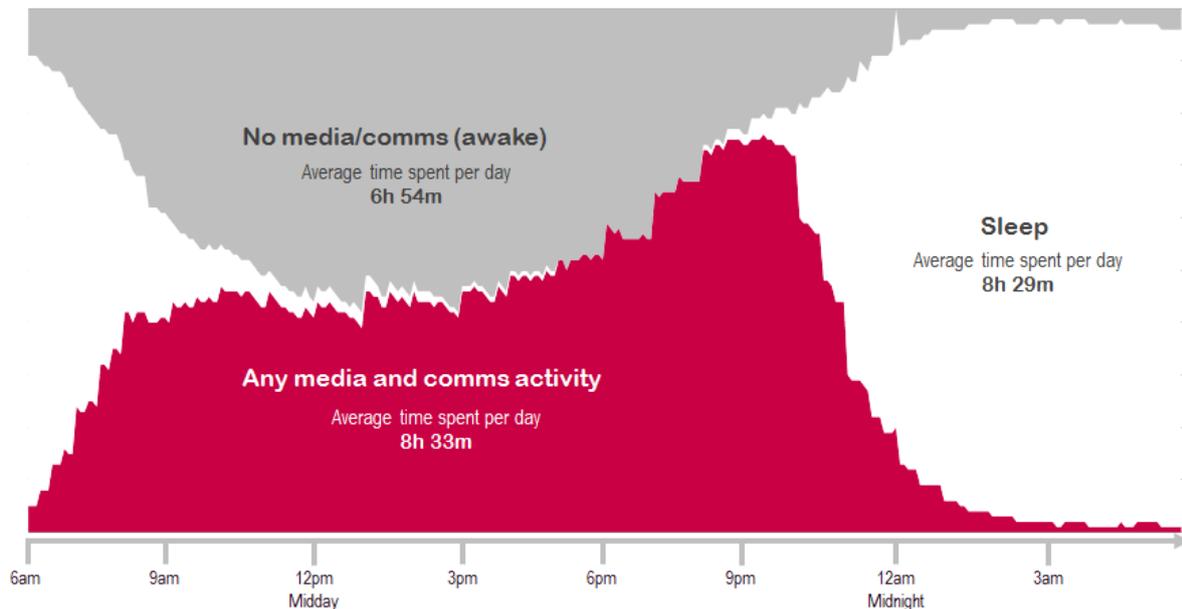
¹ Watching TV includes, watching TV and films via live TV, recorded TV, on-demand TV (paid or free) and DVD/Blu-ray

² Within this report we focus on the data from the adults' diaries only.

Typically, adults in Wales spend more time using media or communicating than they do sleeping

Adults in Wales spend the majority of their waking hours engaged in media and/or communications activity (8h 33m). The actual time spent on media and communications per day is relatively consistent across the UK nations.

Figure 1.2 Media and communications vs. non-media and comms activity, by time of day



Source: Ofcom Digital Day 2016
Base: Adults aged 16+ in Wales (176)

Through multi-tasking, adults in Wales squeeze 10h 24m of media and communications activity into 8h 33m on a typical day

People consume media in different ways, either focusing solely on the task in hand (categorised as solus activity), or doing two or more things at once, such as watching television and communicating with friends over instant messenger (media multi-tasking). Our research showed that thanks to multitasking, adults in Wales typically squeeze 10 hours 24 minutes' worth of total media activity into 8 hours 33 minutes of actual time. Since 2014, this picture has changed among adults in Wales, as there has been a decrease in both the total time spent on media and communications, and the actual time spent in a typical day on media and communications. Adults in Wales spend the least amount of total time on media and communications out of all the nations.

Figure 1.3 Average daily media and communications time, by nation



Source: Ofcom Digital Day 2016

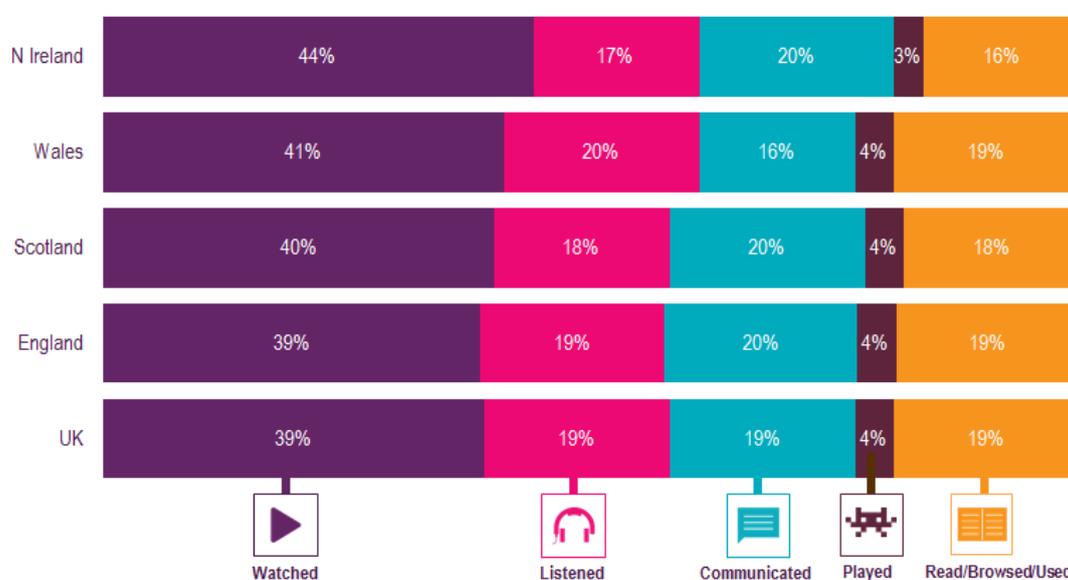
Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N. Ireland (155)

Among adults in Wales, two-fifths of total media and communications time is spent watching content

Watching content, such as TV programmes, films or short video clips, accounts for 41% of the total time spent on media and communications by adults in Wales. This consists predominantly of live TV, which makes up 26% of the total media and communications time.

The proportions of time spent on the five broad activity types (watching, listening, communication, playing and reading/ browsing/ using) is consistent across the nations, and there have been no significant changes since 2014.

Figure 1.4 Proportion of time attributed to activity types, by nation



Source: Ofcom Digital Day 2016

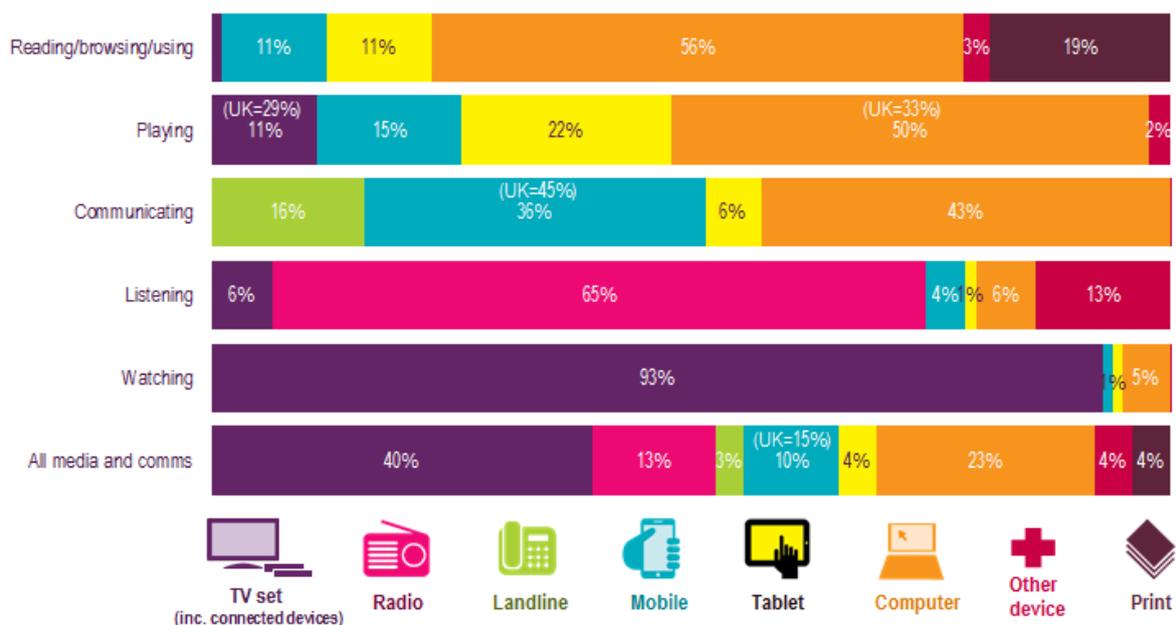
Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N. Ireland (155)

Adults in Wales spend a lower proportion of time communicating using their mobile than the UK as a whole

Adults in Wales spend proportionally more time watching TV than using any other device; this is consistent across the nations. Their communication time is primarily spent on mobile phones and computers, with the latter device also being used for reading/ browsing/ using.

When we break activity type down by device used, we can see that for communications activities, adults in Wales are using a mobile less than the UK as a whole. When we look at playing video games, compared to the UK as a whole, adults in Wales are less likely to use a TV set (including through a connected games console) and more likely to use a computer.

Figure 1.5 Proportion of time attributed to devices, by activity type

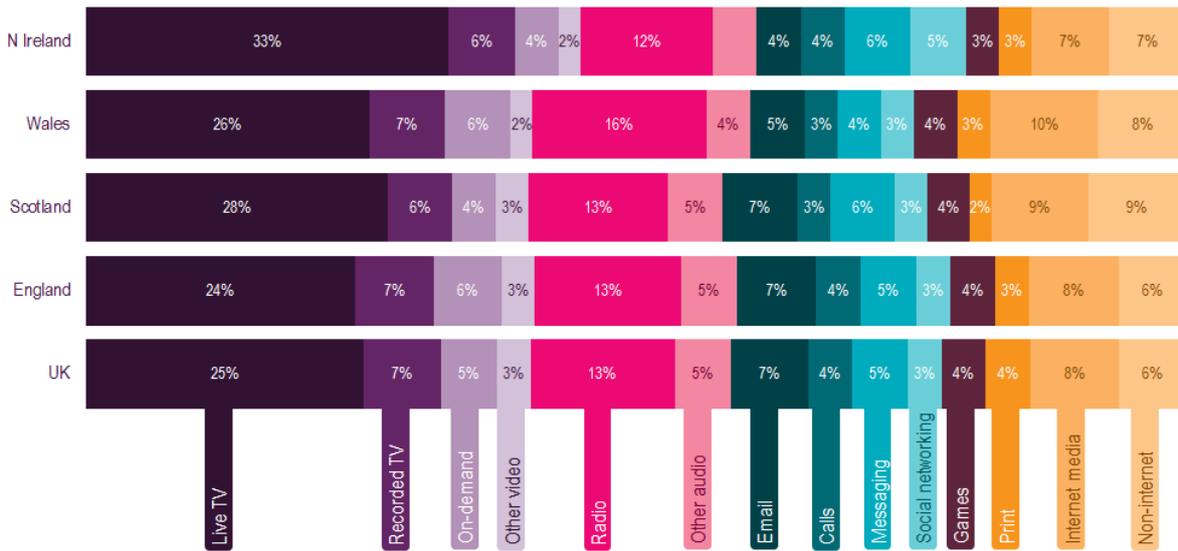


Source: Ofcom Digital Day 2016

Base: Adults aged 16+ in Wales (176)

The proportion of total media and communications time spent on certain activities among adults in Wales is in line with the UK as a whole; a quarter (26%) of media and communications time is spent watching live TV and 16% listening to the radio.

Figure 1.6 Proportion of time attributed to grouped activities, by nation

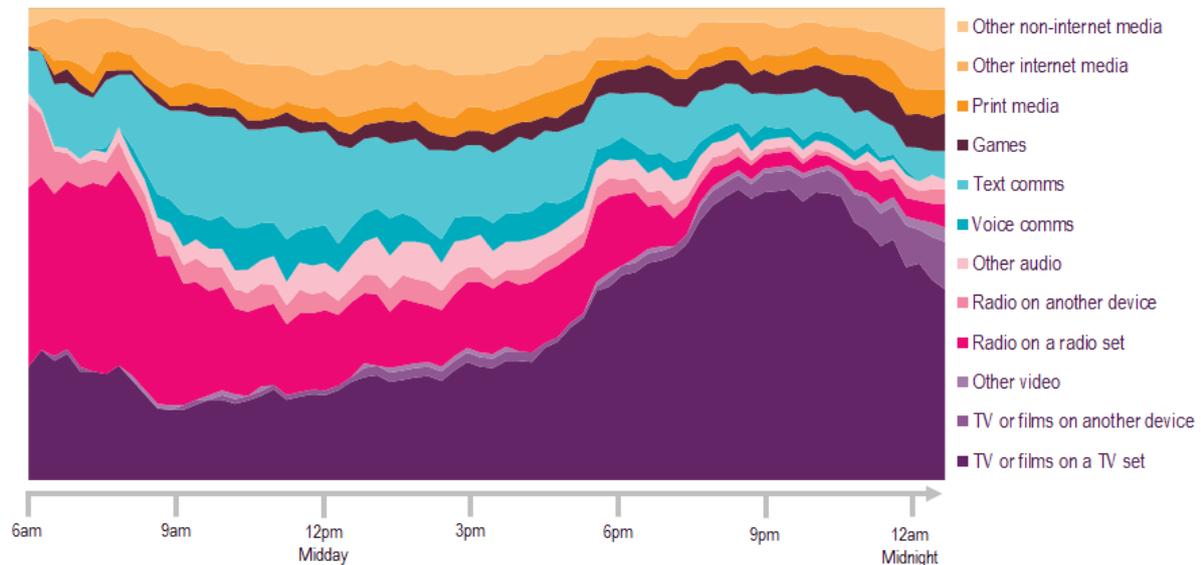


Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N. Ireland (155)

Watching TV on a TV set is the most popular activity in the evening

Looking at the proportion of all media and communications activity participated in, by time of day (across a week), among all adults in Wales, watching TV on a TV set dominates in the evening: it takes up around 60% of activity between 9:15 and 10pm, in line with the share for the same time period in 2014 and in line with the UK average. Viewing live TV accounts for 64% of time spent on all ‘watching’ activities.

Figure 1.7 Proportion of media and communications, by time of day



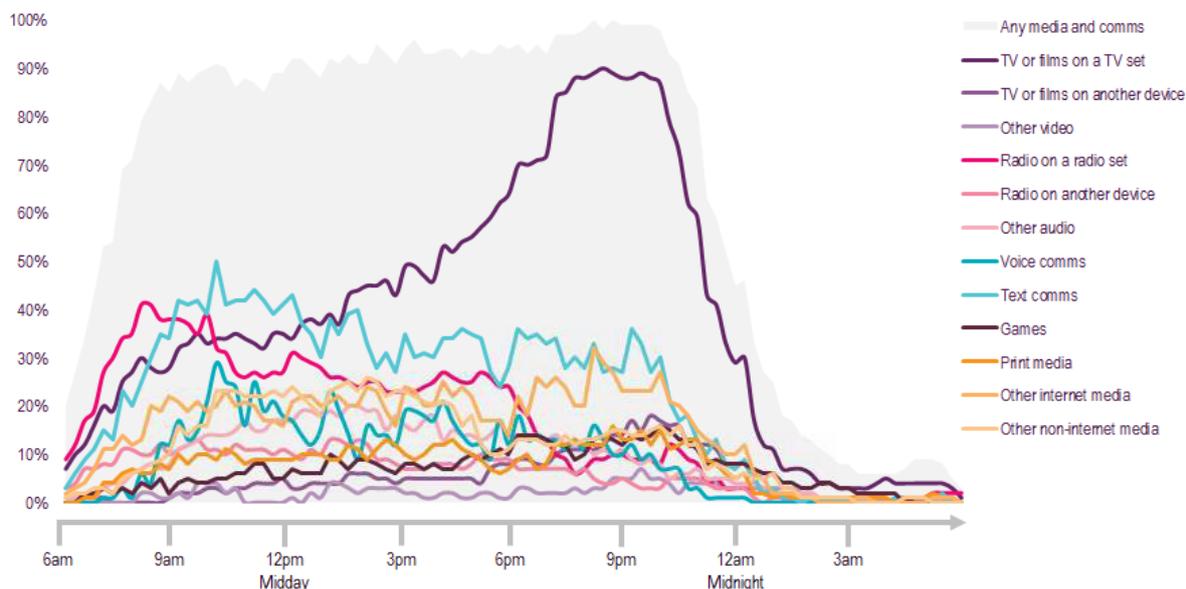
Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in Wales (176)

Radio listening on a radio set has a higher peak reach in Wales than in other nations

The dominance of TV in the evening period is also reflected in terms of reach across the day. Around nine in ten adults in Wales watch TV or films on a TV set between 8pm and

10pm at any point in the week. This compares to a peak of 50% for text communications, which is higher than TV from 8.15am to midday, but increasingly lower in comparison thereafter. Radio listening on a radio set has a higher peak reach in Wales than in any other nation, at 41% between 8:15 and 8:30am, and a higher reach than TV until 9:30am.

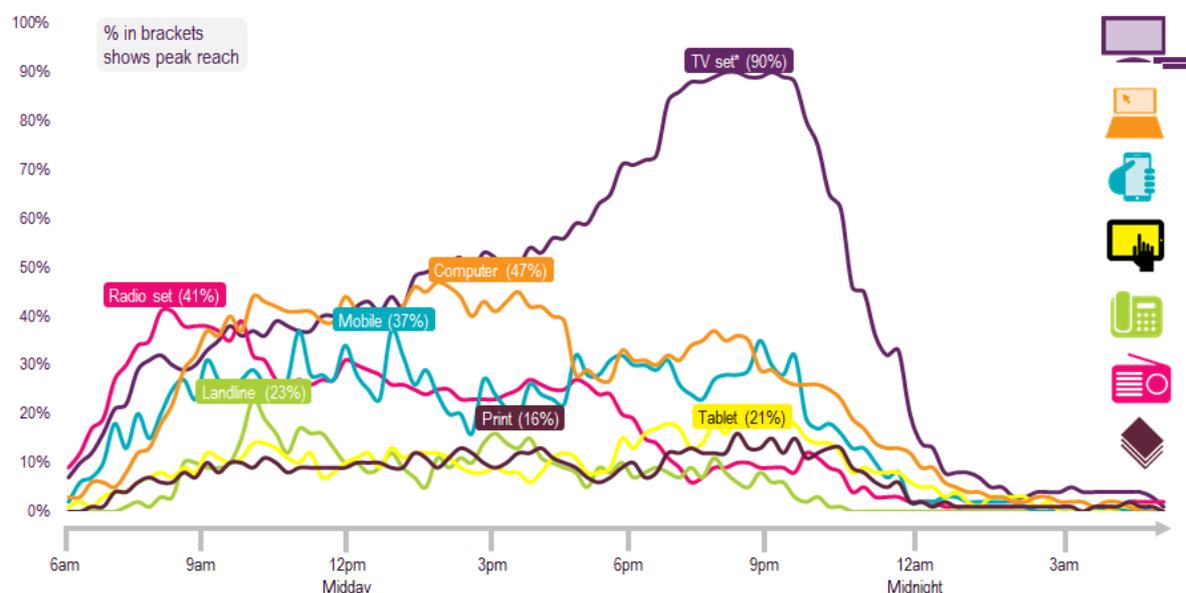
Figure 1.8 Weekly reach of grouped activities, by time of day



Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in Wales (176)

The patterns shown above for TV and radio content across the day are clearly mirrored by the primary associated devices, i.e. the TV and radio set. Radio set use during the early morning is comparatively higher in Wales than in the other nations.

Figure 1.9 Weekly reach of devices, by time of day



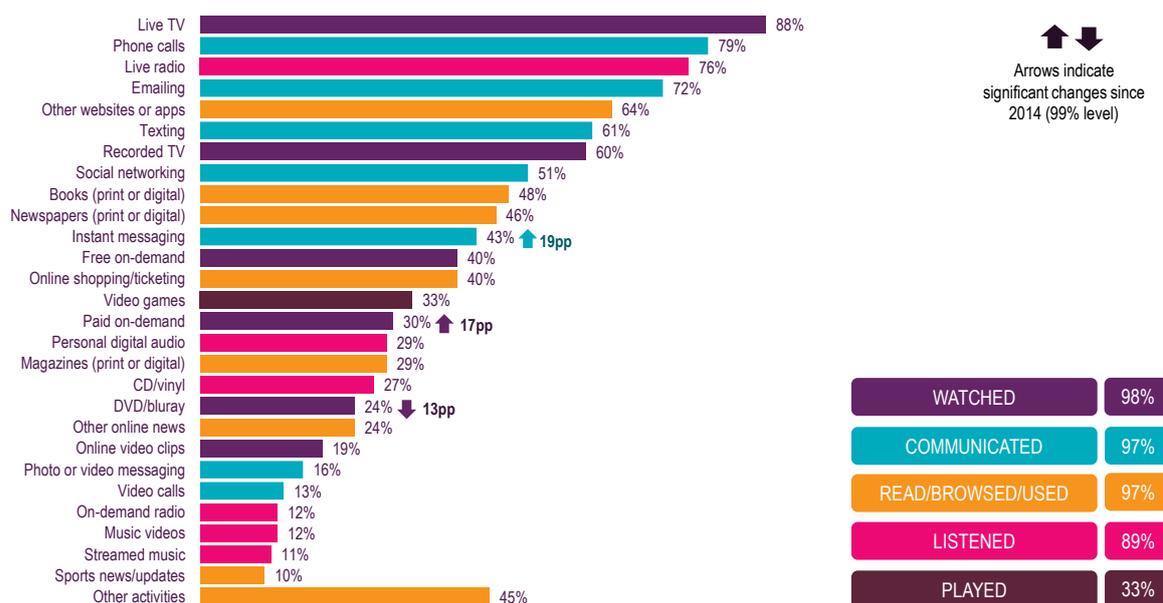
Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in Wales (176)

Since 2014, watching paid on-demand video has increased

Figure 1.10 shows the proportion of adults who did each activity at least once during their diary week. Almost nine in ten (88%) watched any live TV during the week, and this was the most popular activity, ahead of phone calls (79%).

In line with the other nations, instant messaging was the activity that showed the highest increase since 2014, up 19 percentage points from 24% to 43% of adults in Wales using instant messaging. There have also been significant increases in viewing paid on-demand content (to 30% from 13%), whereas DVD/ Blu-ray viewing has decreased by 13 percentage points to 24%.

Figure 1.10 Weekly reach of media and communications activities



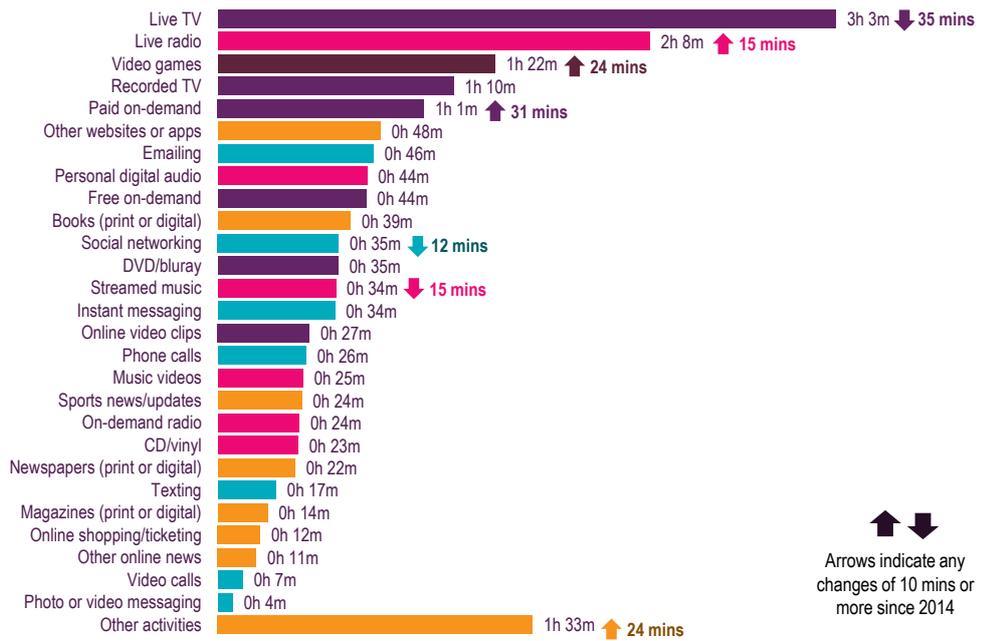
Source: Ofcom Digital Day 2016
Base: Adults aged 16+ in Wales (176)

The average actual time spent watching live TV has decreased by 35 minutes, while watching paid on-demand TV has increased by 31 minutes

Among people who watched any live TV, the average duration of this activity per day is down by 35 minutes since 2014, although the number of people watching live TV has remained the same. And watching content is still a popular activity. While the time spent with live TV has fallen, the average time spent watching paid on-demand content has increased by 31 minutes.

Two further activities show an increase of ten minutes or more since 2014; listening to live radio (up by 15 minutes) and playing video games (up by 24 minutes). In addition to live TV, two other activities are lower since 2014: social networking (down by 12 minutes) and listening to streamed music (down by 15 minutes). Despite time spent on these activities falling, the proportion of people who still do them has remained the same.

Figure 1.11 Average time spent on activities per day



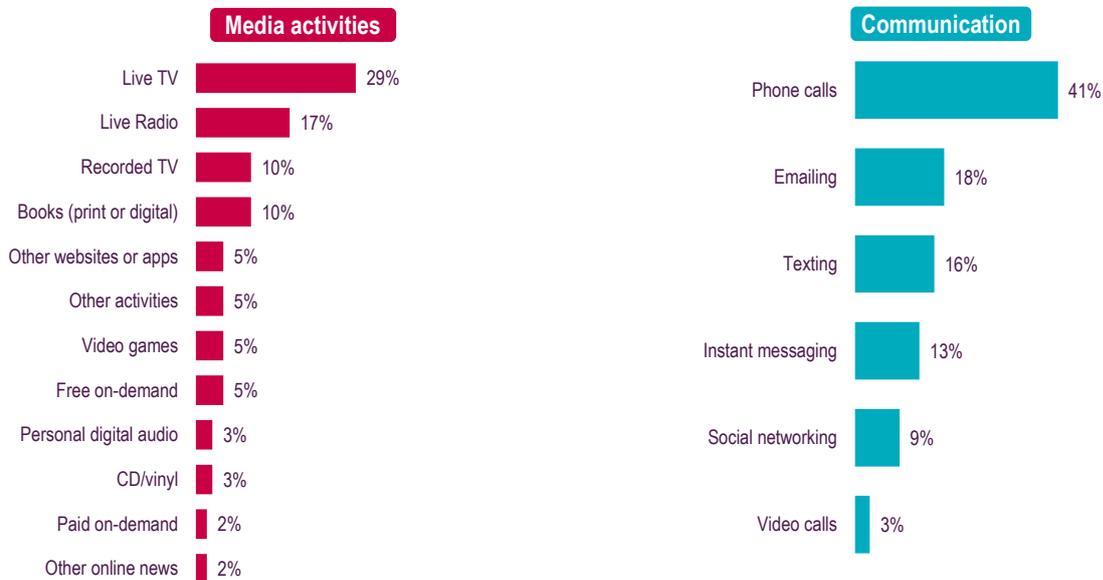
Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in Wales (176)

Phone calls are seen as the most important communication activity

Respondents who completed the diary were asked which media activity, and which communications method, were most important to them personally.

Three in ten adults in Wales said that live TV was their most important media activity, while around two-fifths cited phone calls as their most important communications method; both of these are in line with the UK average (27% and 39% respectively).

Figure 1.12 Media and communications activities cited as most important



Source: Ofcom Digital Day 2016
 Base: Adults aged 16+ in Wales (176)

1.3 Coping in a connected society

Summary

As we've seen in the Digital Day research in section 1.2 for people in Wales, media and communications are a key part of our daily lives, and more time is spent doing these activities than sleeping. With an increase in fixed broadband take-up from 63% to 75% of households between 2014 and 2016, and a 9pp increase between 2014 and 2016 (up to 61%) in the proportion of people who can access the internet on a mobile phone, people in Wales increasingly have the connections and devices they need to get online.

Ofcom commissioned research to investigate how people feel about being connected and what they see as the benefits and disadvantages. The internet is broadening people's horizons and making communications with friends and family easier. But using connected devices, like smartphones or tablets, can get in the way of face-to-face interactions – almost two-thirds of people in Wales have felt ignored because the person they were with was using a device. There is a risk of collisions too – half the people in Wales have had someone bump into them because the other person was engrossed in their phone.

People don't want to put their devices down, and three in ten agree that they spend too much time online, although the number of people in Wales agreeing with this is lower than for the UK as a whole.

Half of the people in Wales see themselves as 'hooked' on their connected device, and one in five feels nervous without their mobile. A minority (one in ten) say they feel nervous or anxious when they are offline. However, compared to the UK as a whole, adults in Wales are less likely to be tied to their device or feel guilty about the amount of time they spend online. Some people in Wales have given themselves a 'digital detox'; almost three in ten (28%) had abstained completely from the internet for some time because they thought they'd been using it too much.

People in Wales are embracing the online world

Connectivity is broadening people's horizons; three-quarters of internet users³ (75%) agree that being online enables them to do things that they could not do otherwise. Just over half of internet users (52%) agree that they would know a lot less about the world (or their local area) if they did not have access to the internet.

People in Wales are making the most of the benefits of being online; eight in ten internet users (80%) agree that new communications services have made life easier.

As well as people making more use of being online, they are also becoming more used to being online. If they couldn't access the internet, almost half the internet users in Wales would feel they were missing out, and around a third wouldn't know where to find information if they couldn't get online.

But not everyone feels the same about the time they spend online

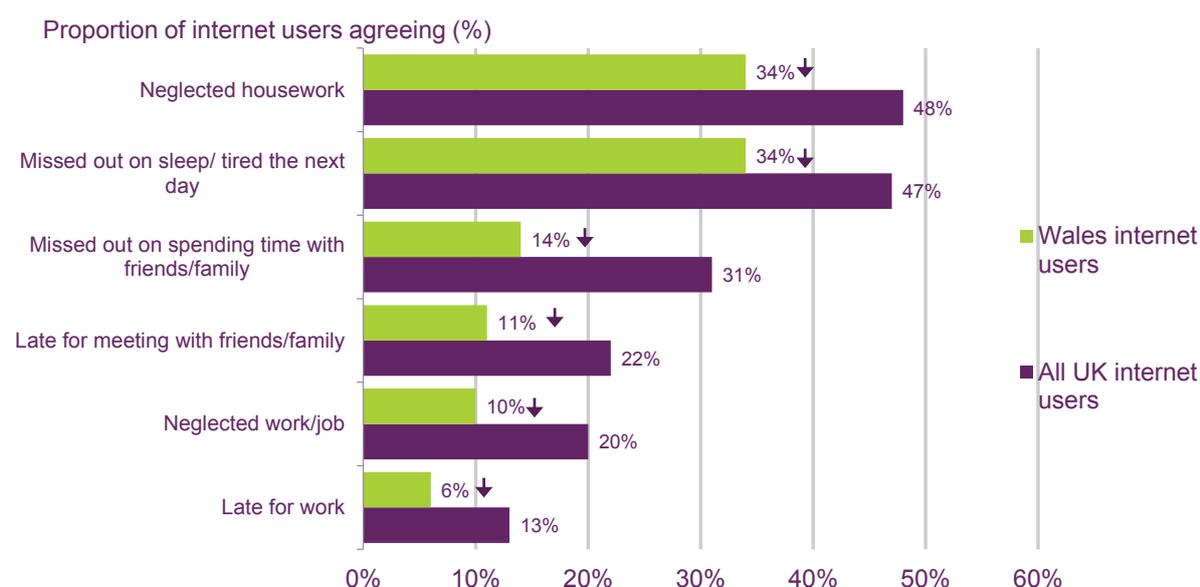
The relationship people in Wales have with the internet is not all plain surfing. Many recognise some of the more negative impacts it can have on their work and home lives.

³ Internet users are defined as those who have been online within the last month

While these new opportunities are empowering, and a third agreed that being online enables them to work more flexibly, one in seven (16%) agreed that constant connectivity makes them feel as though they are always at work. And one in ten people feel guilty about the amount of time they spent online, even though two in five (39%) internet users in Wales admit to spending longer than they planned on browsing the internet, and just under a third (30%) admit to spending longer than they planned on social media. When people in Wales do spend more time than intended online, it is housework and sleeping that are most likely to be neglected.

For people in Wales, the negative effects of being online were felt to a lesser extent than across the UK as a whole; more people in Wales said they had *never* been affected by any negative effects of being online (52% in Wales vs. 37% in the UK as a whole). In line with this, thirty percent agree that they spend too much time online, but this is less prevalent among people in Wales than among the UK as a whole.

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: 1861, 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?

Arrows represent significant increase or decrease compared to all UK internet users

Although using smartphones is disruptive to conversation, people still do it

While the internet has, for many, revolutionised communication, almost two-fifths felt that the internet interrupts face-to-face conversations with friends and family and, just over one in ten had either missed out on spending time with, or been late for meeting friends and family because they were on the internet.

People in Wales were equally as likely to keep in touch with friends via text messages as they were to meet them face-to-face. And, although two-fifths of people in Wales say that their devices are interrupting face-to-face conversations, they are still willing to use their smartphone while in company; three quarters (76%) of smartphone users admitted to using their smartphone in at least one social situation. Whether they are watching television with friends, in a restaurant with other people, or having dinner at home, people use their devices and, as shown in Figure 1.14, some even use their smartphone at the cinema or theatre.

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



Source: Ofcom research 2016

Base: All respondents in Wales (119), smartphone users in Wales (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?

Almost two-thirds of people in Wales feel ignored because other people are always on their devices

Considering the widespread use of devices, and sometimes even while in the company of others, it is no surprise that people in Wales report feeling ignored. Almost two-thirds (63%) of people in Wales said they had felt ignored by a friend or relative because the other person was busy using their phone or tablet. Almost a third (31%) said they experienced this at least once a week and one in ten (10%) felt like this daily.

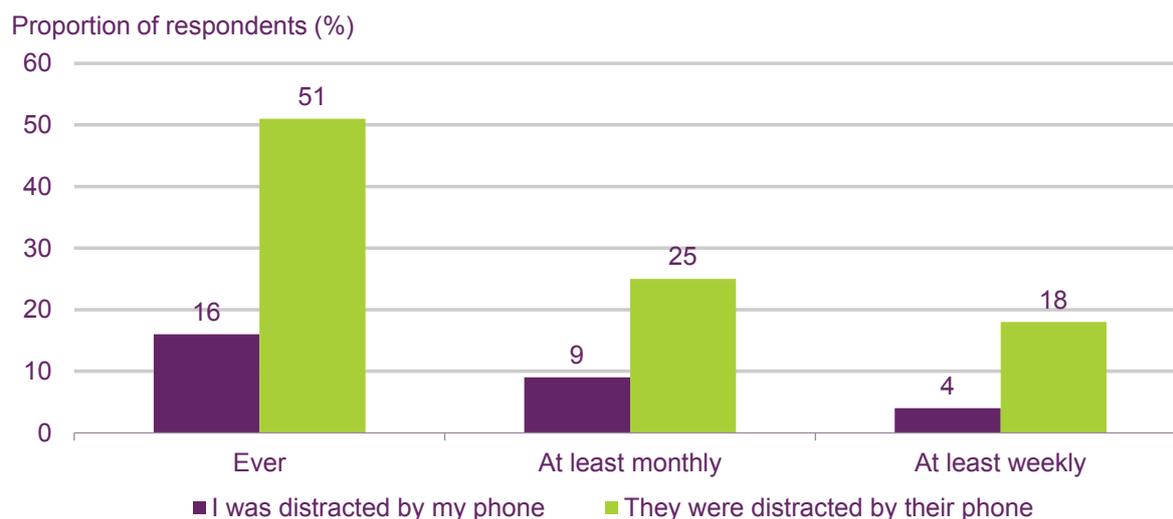
Some people use their devices to communicate with people while they are in the same place as them. A quarter of people in Wales had done this; at home, or at a friend's house are the places where people are most likely to communicate electronically with others while they are physically together.

Some people just can't put their devices down, and it's housework and sleeping that suffer...

This might be because some people feel that they just can't leave their devices alone. Around half (46%) of people in Wales see themselves as 'hooked to' their device, a lower proportion than the UK as a whole (59%). One in ten agree that they would feel anxious when not connected, although a much larger proportion (four in five) disagree - a higher proportion than in the UK as a whole.

Another effect of people not being able to put their devices down is the risk of bumping into people and objects. Half of the people in Wales have been bumped into in the street because another pedestrian was engrossed in their phone or tablet. However, only one in six admitted that they had bumped into someone or something themselves while they were focused on their device.

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



Source: Ofcom research 2016

Base: All respondents in Wales (110)

...although some people have tried to disconnect for a while

In a bid to strike a healthier tech-life balance, some people in Wales have chosen to give themselves a ‘digital detox’ i.e. purposefully disconnecting and going without the internet for a period of time. Almost three in ten (28%) had self-imposed some time away from the internet because they thought they were using it too much. Their feelings during the period without the internet were more positive than negative; they felt more liberated and less distracted. None of them said that they had found the experience stressful, or that it made them anxious or worried about not being able to keep in touch with friends and family. When asked whether they could cope with a digital detox, almost two-thirds (62%) felt that they would be able to cope, with only one in five (19%) thinking that they couldn’t cope.

In addition, a majority (87%) had made a conscious effort to reduce the time they spent online. Just over a fifth had reduced the time they spent on social media (22%), with one in twenty (5%) suspending a social media account altogether. To regulate their use of technology, almost two-thirds (63%) of people in Wales have imposed one or more rules on themselves around their use of technology, and three-quarters (74%) of parents had imposed rule/s on their children to limit their time online.

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

Introduction

Using data from Ofcom’s Technology Tracker survey (January-February 2016), we have undertaken some analysis of adults in Wales who are able to speak or write Welsh (fluent or non-fluent), looking at their take-up of key communications services and devices.

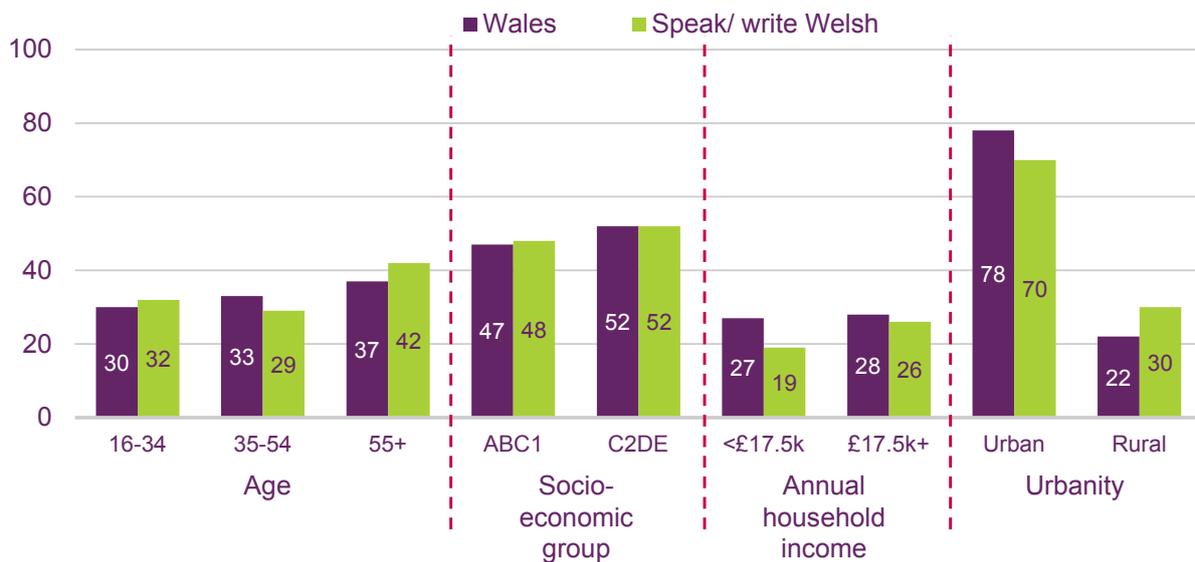
Figure 1.16 shows the demographic profile of those who can speak or write Welsh, and compares them to the Welsh sample as a whole. Figure 1.17 shows take-up of key communications services and devices among adults in this sub-group.

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.

In 2016, the annual household income, socio-economic group and urbanity of those who speak or write Welsh is comparable to all adults in Wales. Welsh speakers/ writers are more likely to be in the 55+ than in the 35-54 age group (42% aged 55+ vs. 29% aged 35-54).

Figure 1.16 Demographic profile of those who can speak or write 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

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

Figure 1.17 shows that in 2016, those who speak or write Welsh are less likely than all adults in Wales to have access to any type of internet at home (74% vs. 84%). There are no other statistically significant differences.

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, H1 2016

Base: All adults aged 16+: 489 Wales, 135 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 for web/data access.