

Wales' communications market

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

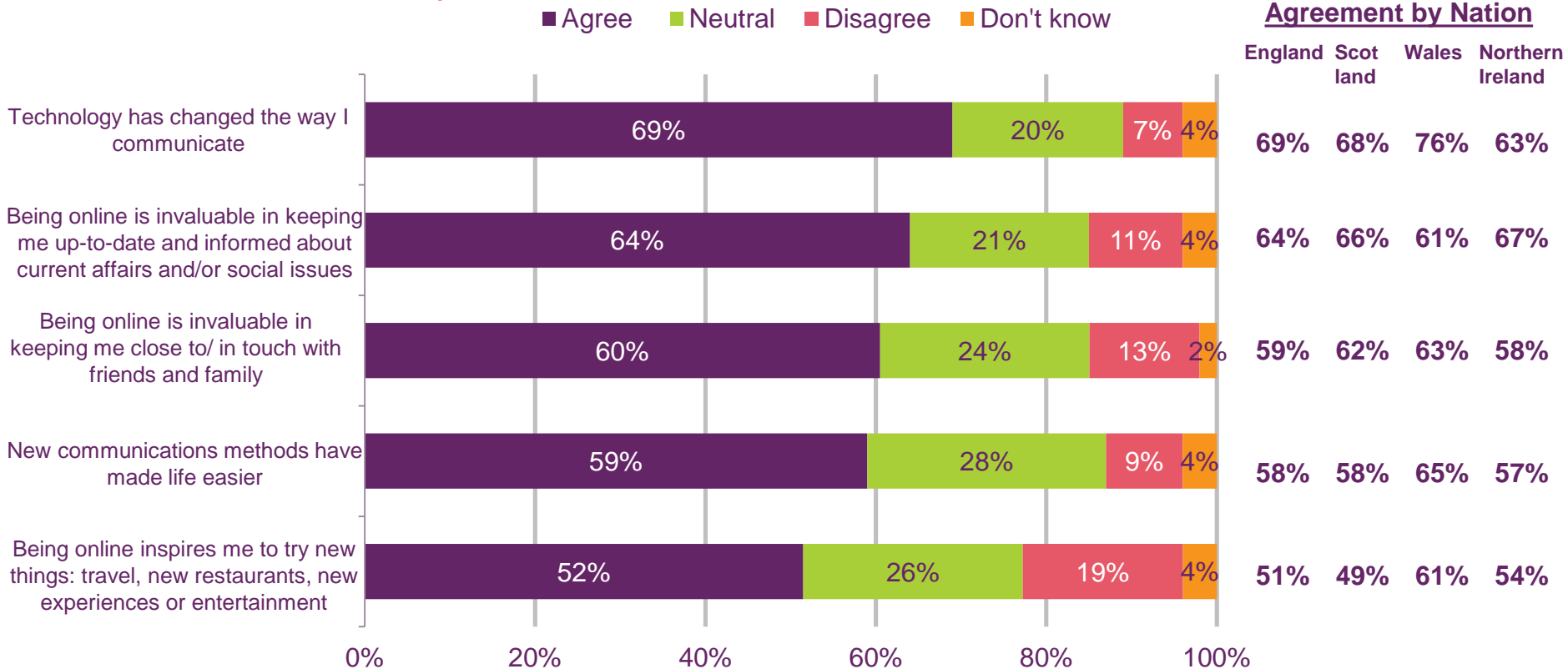
Source: Office for National Statistics: Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2013; Office for National Statistics: Regional Labour Market, May 2015; Office for National Statistics: Family Spending 2014 edition; Office for National Statistics: 2011 Census,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

Social communication online

Figure 1.2



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



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

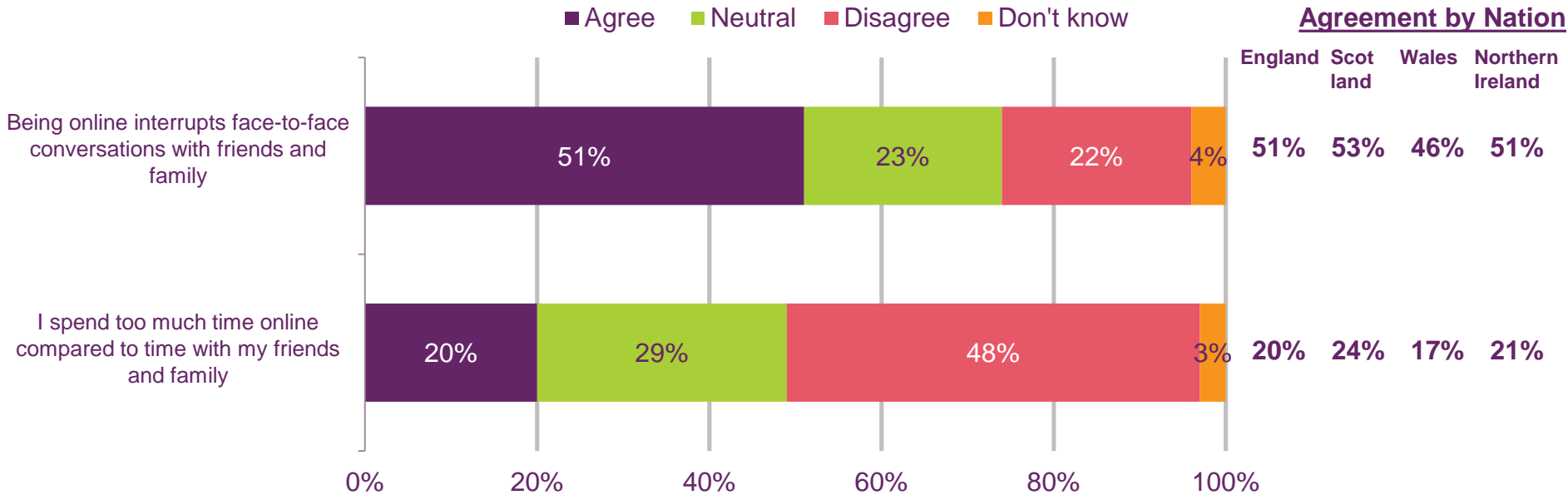
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

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

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).

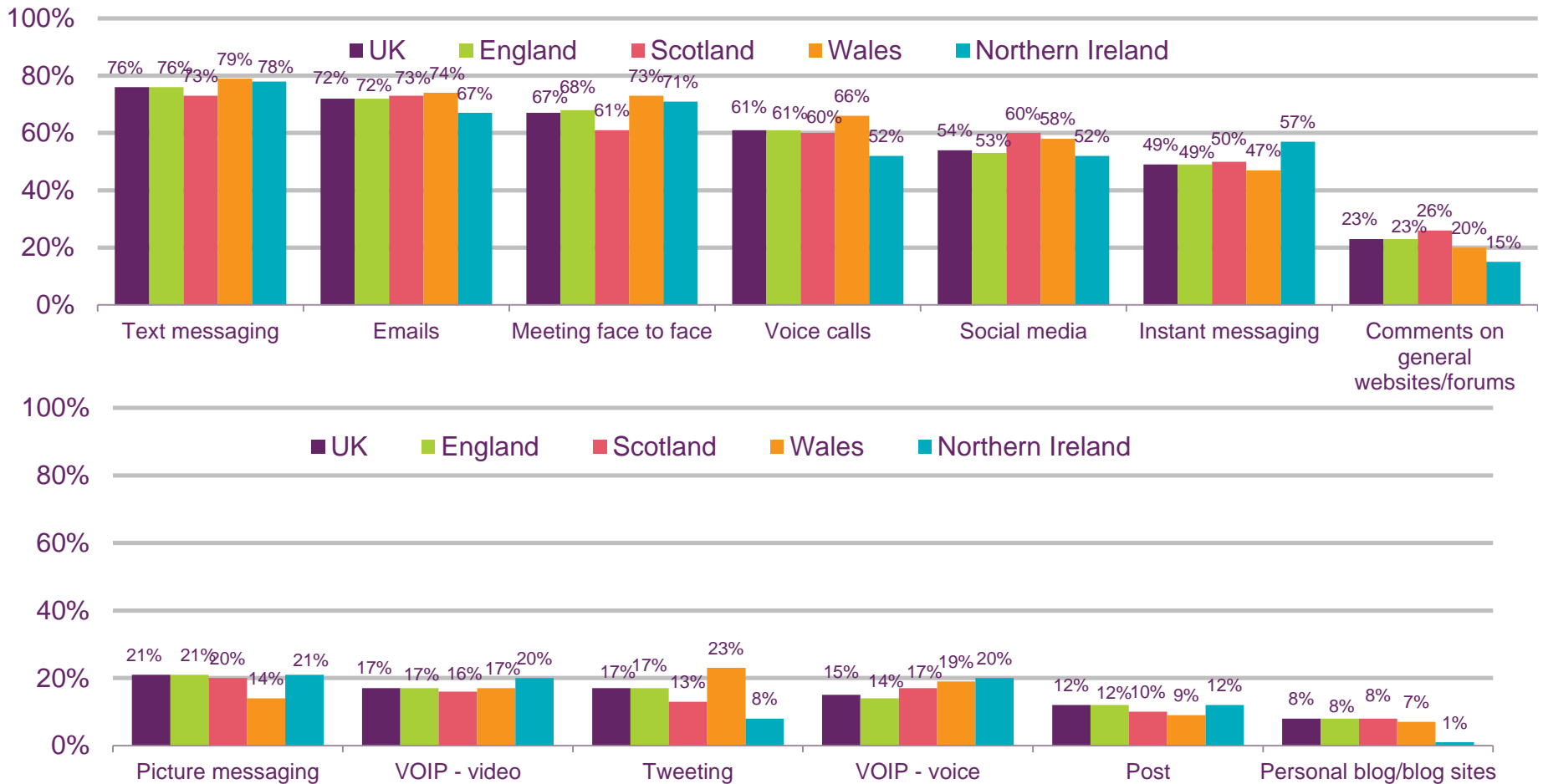
Q115 How much do you agree or disagree with the following statements?

Figure 1.4

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



Proportion of online respondents %



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).

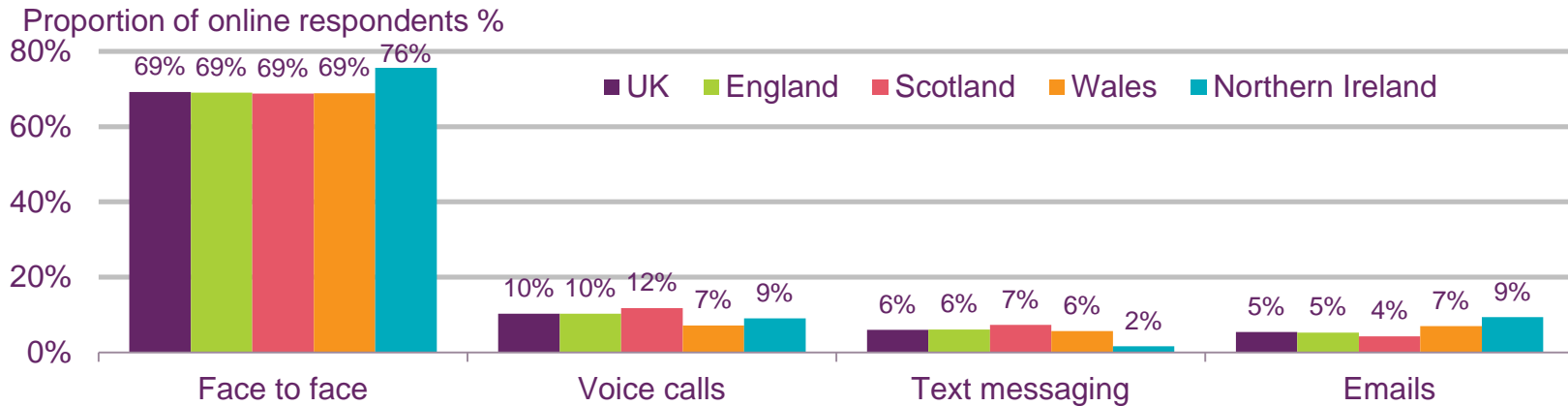
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

Figure 1.5

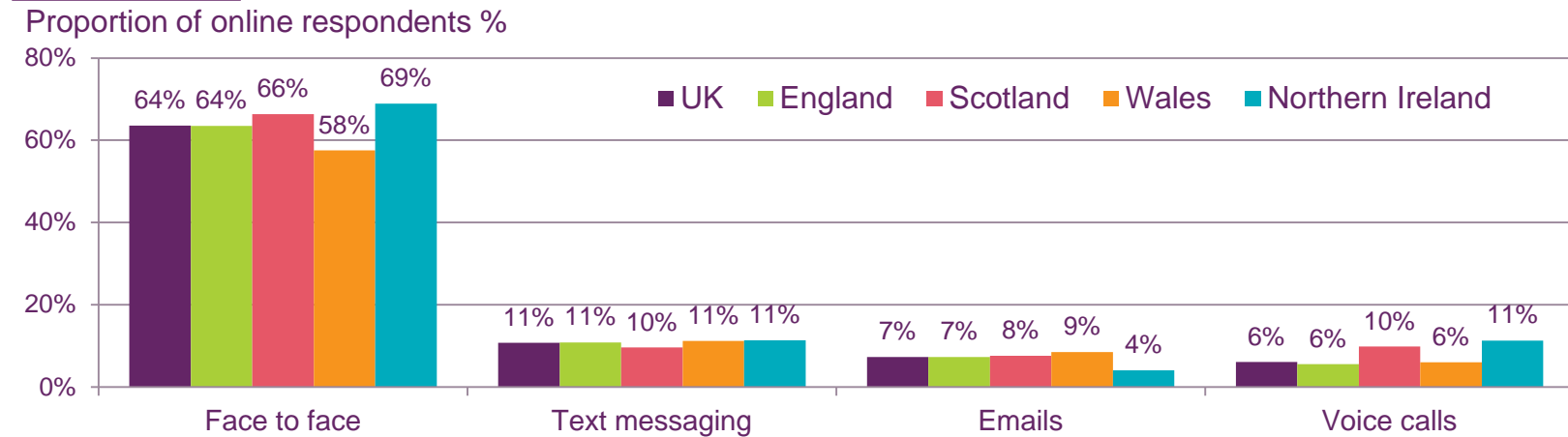


Preferred method of communicating with family and friends

Family members



Close friends



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 ?

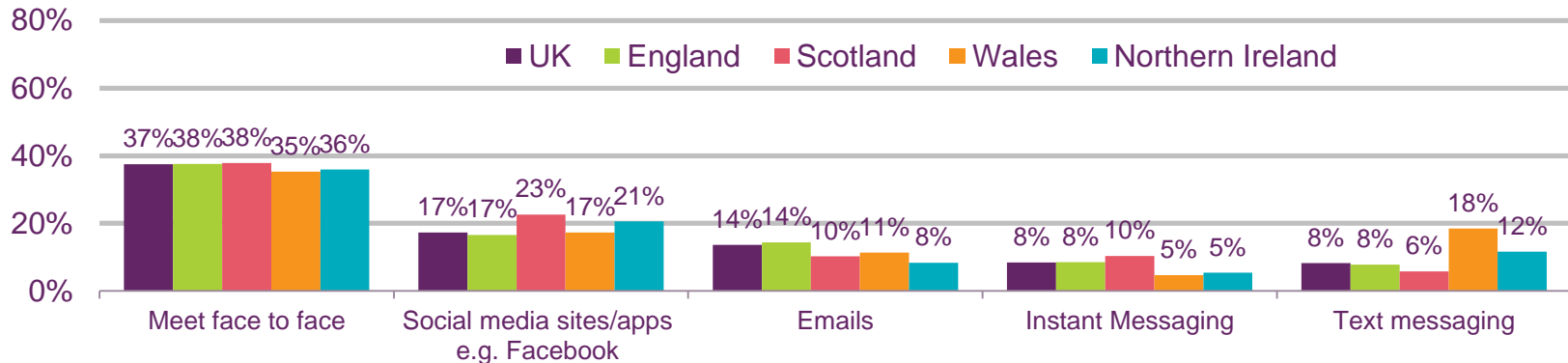
Chart includes data for all responses 5% or over.

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 ?

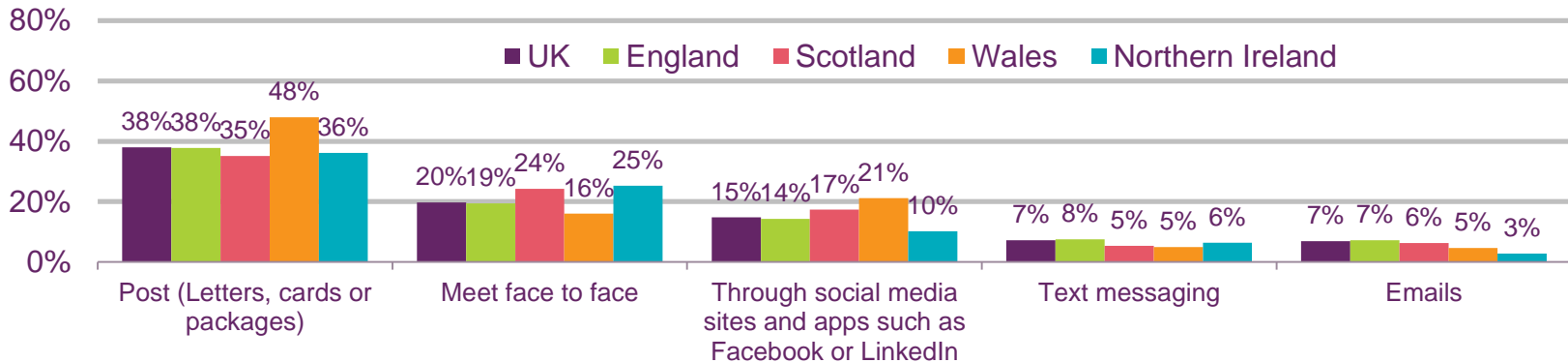
Chart includes data for all responses 5% or over.

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.

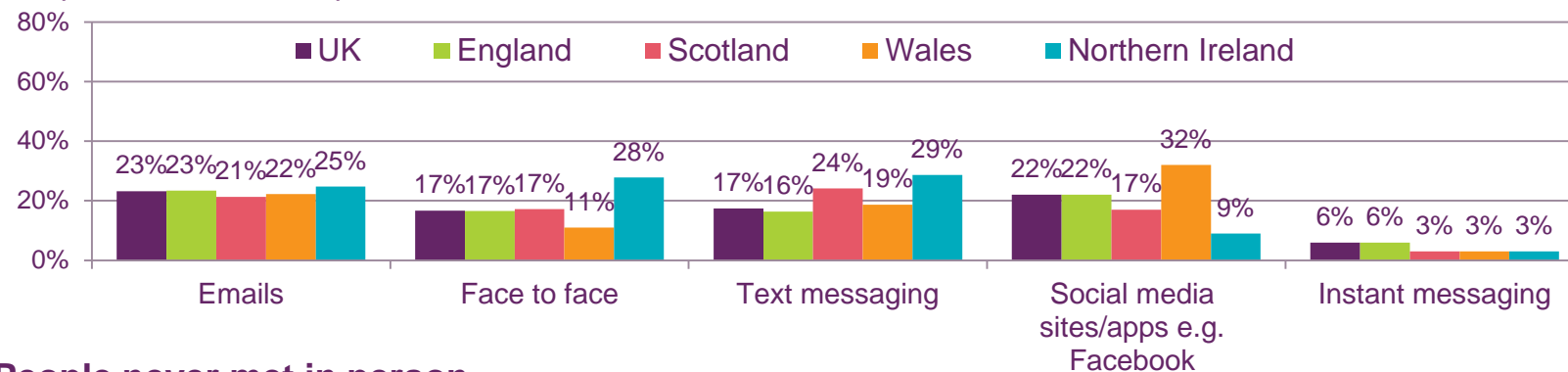
Figure 1.8



Preferred method of communicating with people less well known

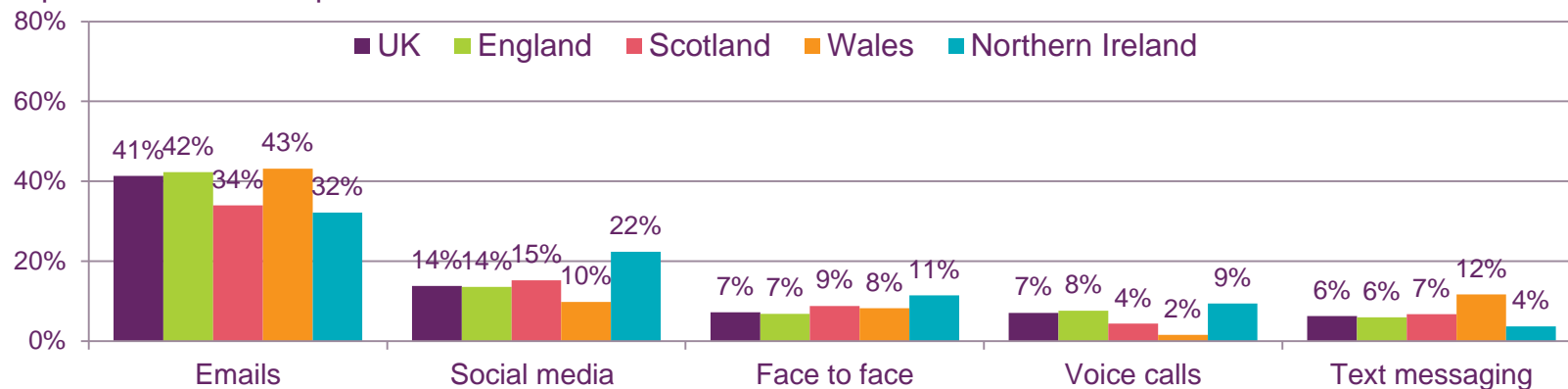
Friend you don't know so well

Proportion of online respondents %



People never met in person

Proportion of online respondents %



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.

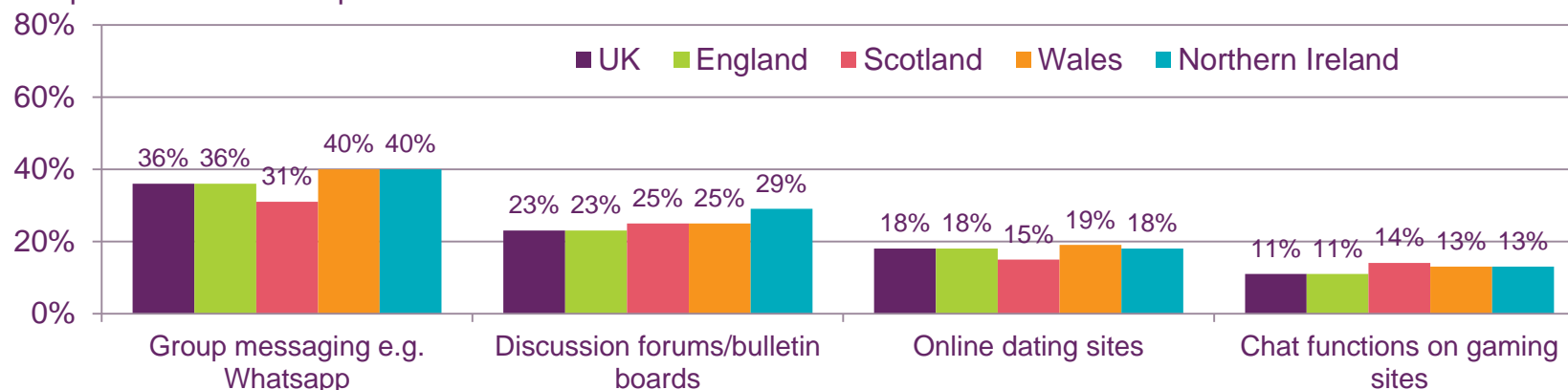
Figure 1.9

Use of different online activities to make new contacts



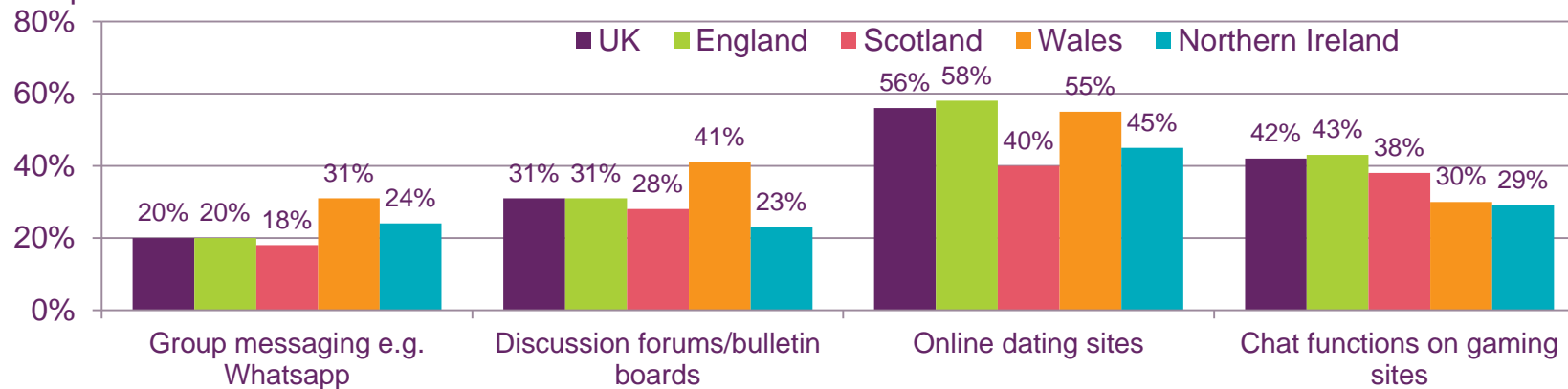
Ever used the following types of websites

Proportion of online respondents %



Made new friendships or contacts online

Proportion of site users%



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 ?

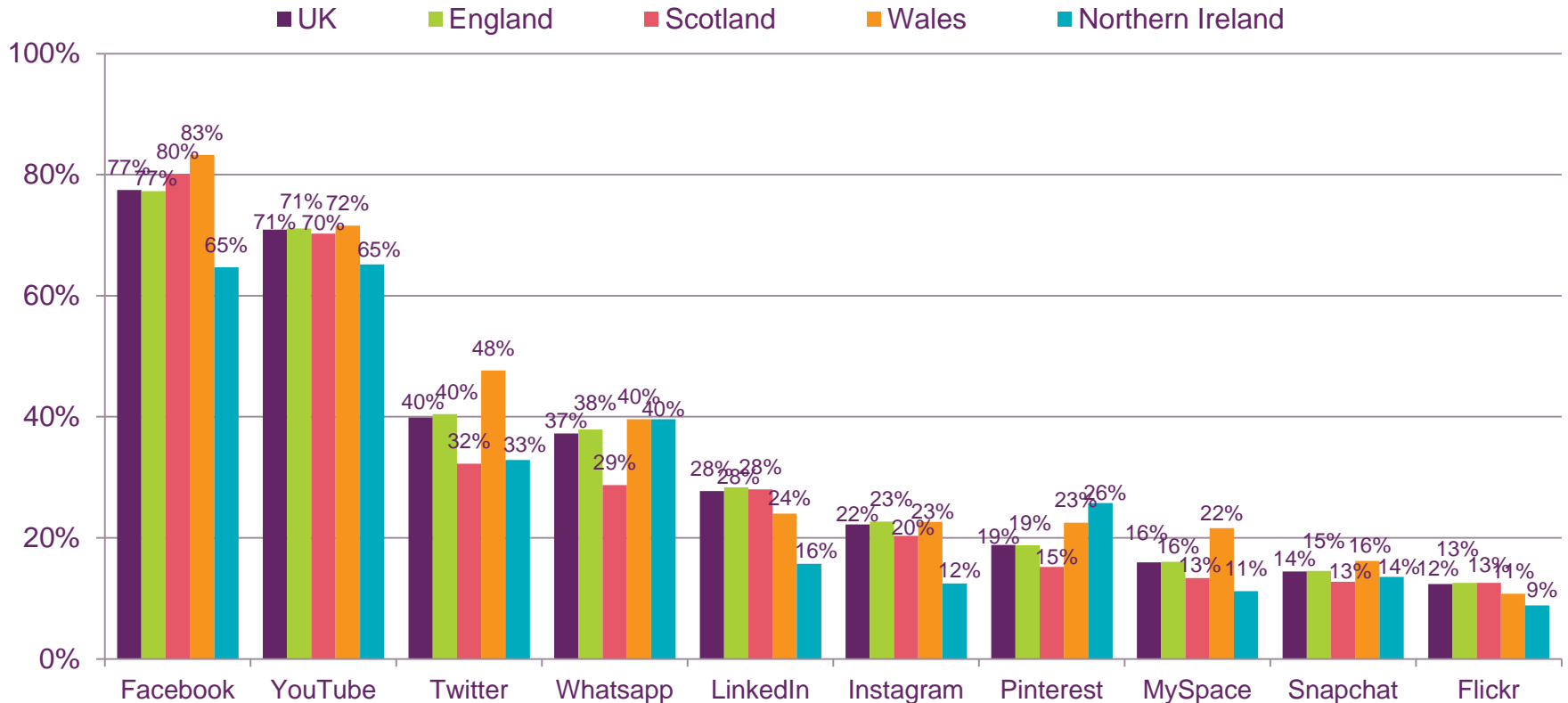
Q70a. And have you ever made new friendships or contacts online. ?

Social networking

Figure 1.10

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

Proportion of online users (%)



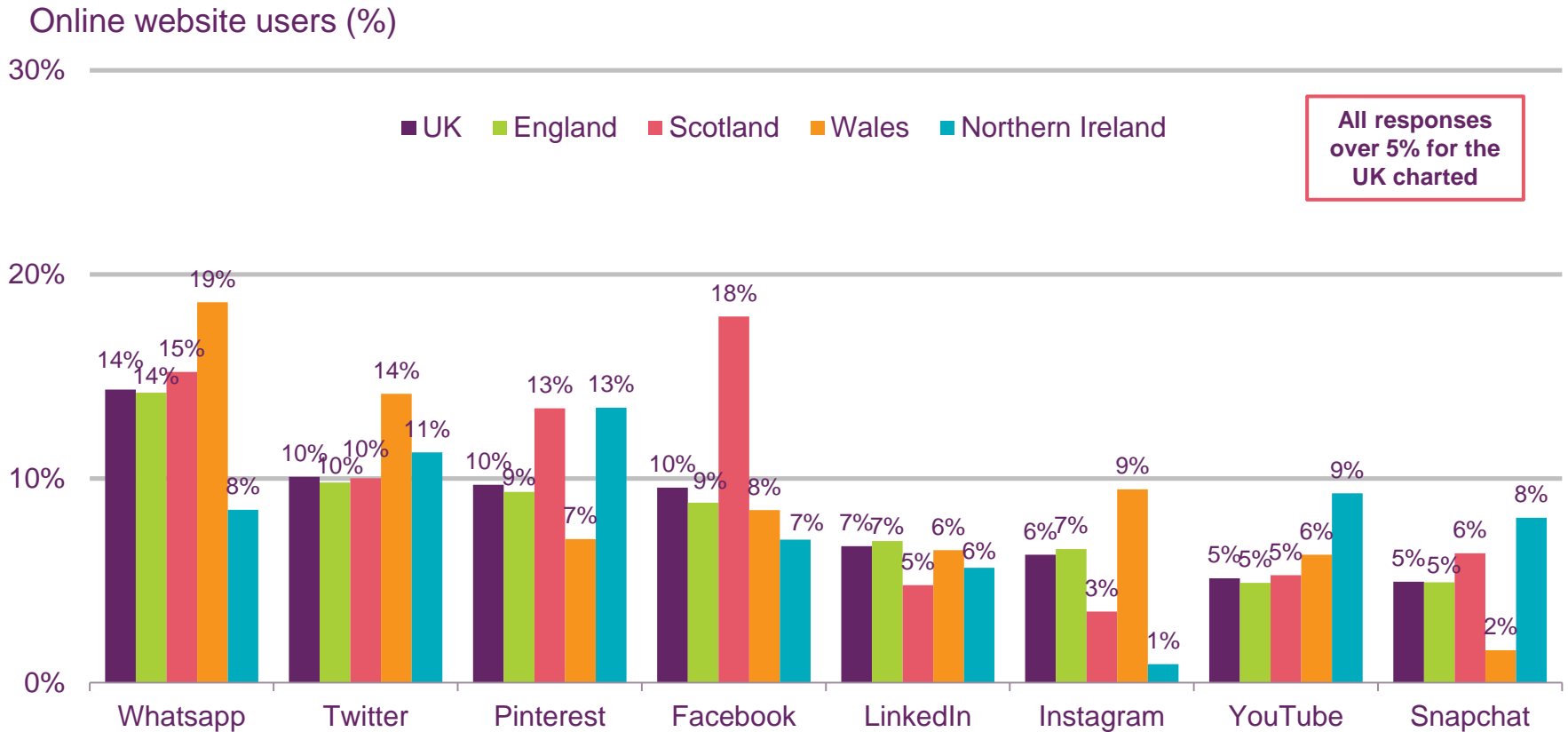
Source: Ofcom research, 'Connected Devices', May 2015

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)

Figure 1.11

Site or app most recently added



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

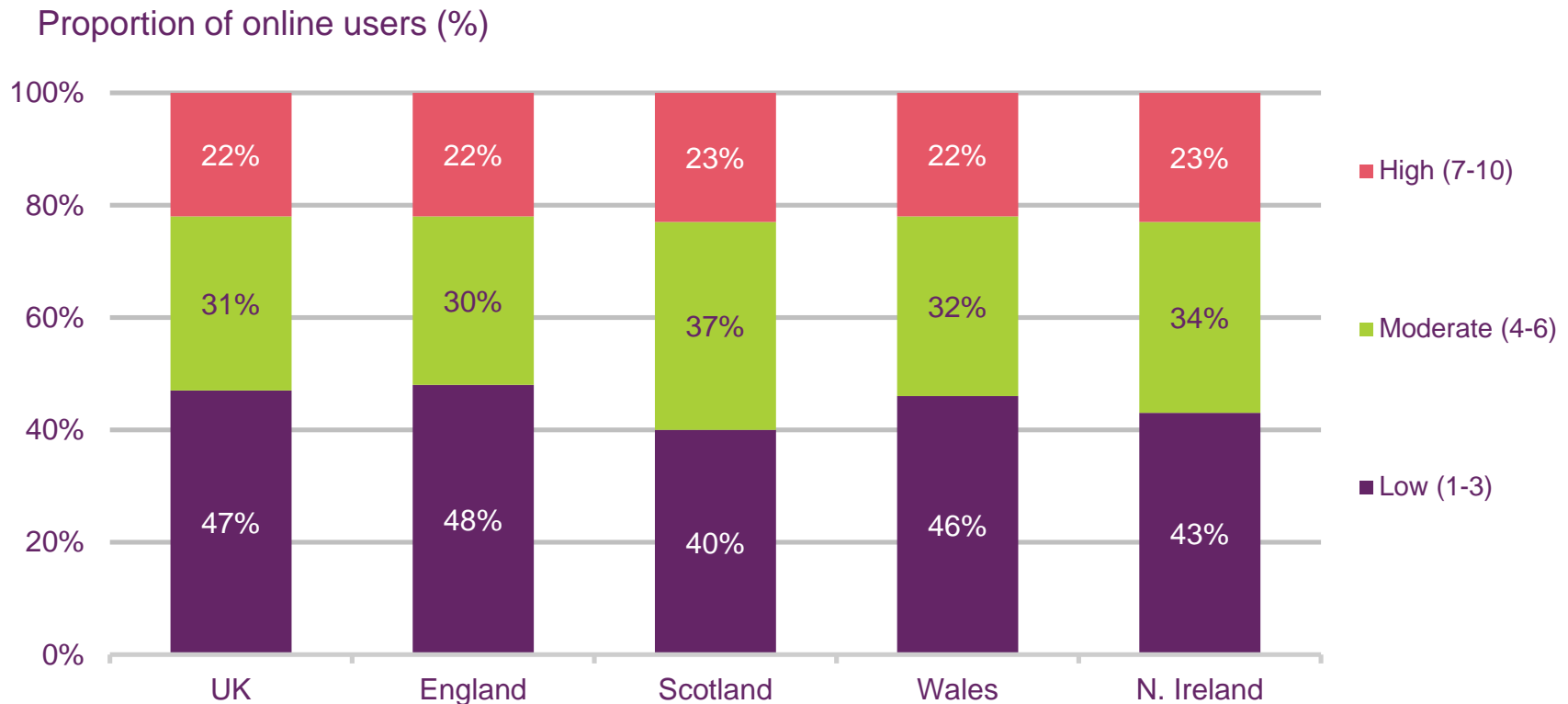
Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).

Q61d. Which one is your most recent addition?

Chart includes data for all responses 5% or over.

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?

Figure 1.13



Level of agreement with statements about social media

Proportion of online users (%)

Agreement by nation



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

Base: All online adults 16+ =2290

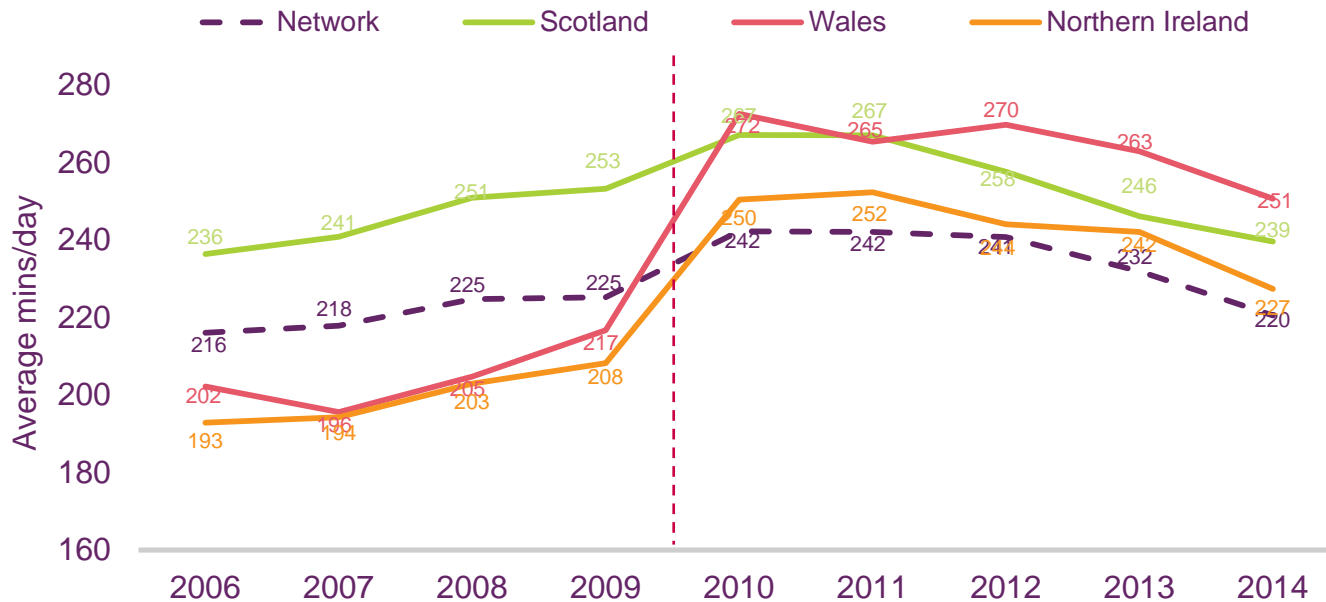
Q90 How much do you agree or disagree with the following statements regarding social media?

Changes in audio-visual consumption in Wales

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+



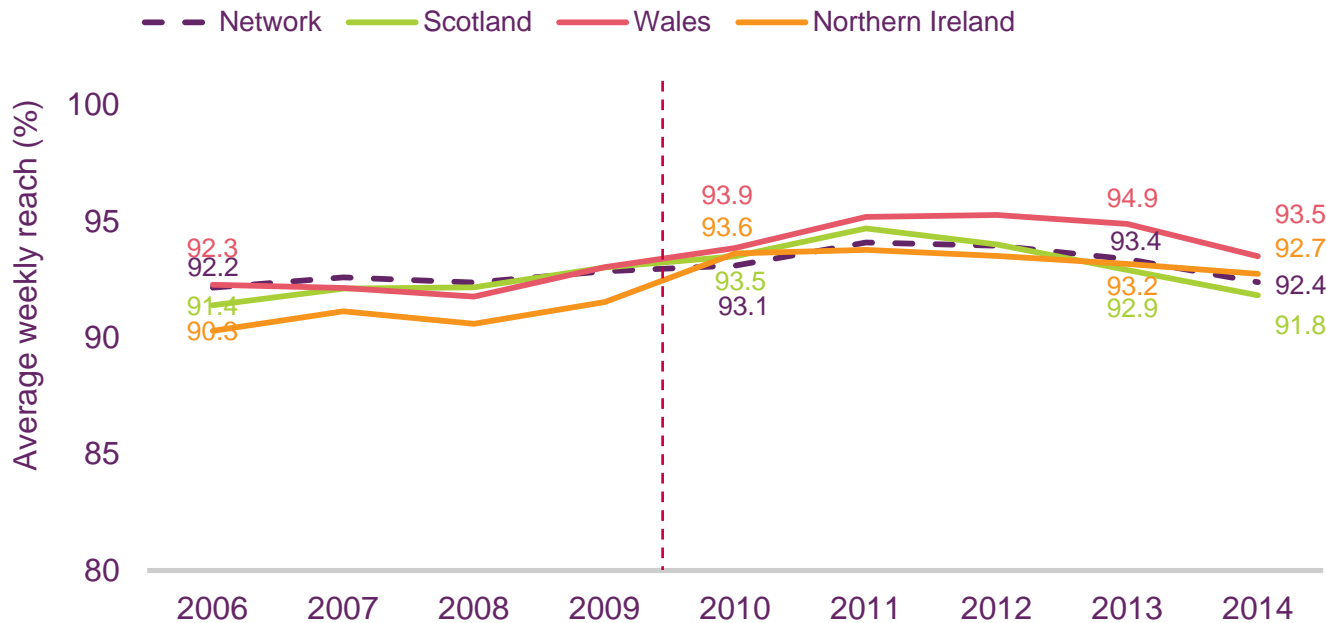
	% change: 2013-2014
Northern Ireland	-6.1%(-15min)
Wales	-4.7%(-12min)
Network	-4.9% (-11min)
Scotland	-2.7%(-7min)

Source: BARB. Note: New BARB panel introduced 1st 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.

Figure 1.15

Average weekly reach of total TV, by nation

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

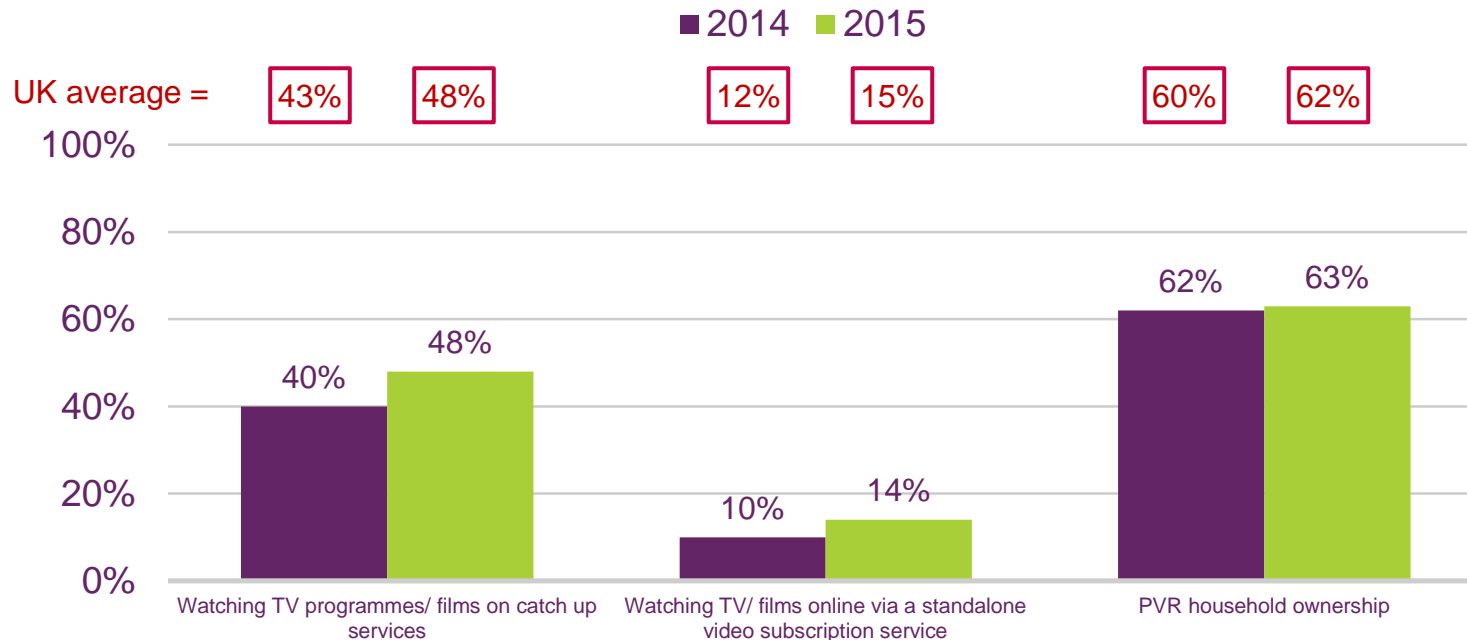


	Percentage point change: 2013-2014
Wales	-1.4
Scotland	-1.1
Network	-1.0
Northern Ireland	-0.4

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

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?

Figure 1.17

Claimed changes in viewing behaviour: nations



		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.

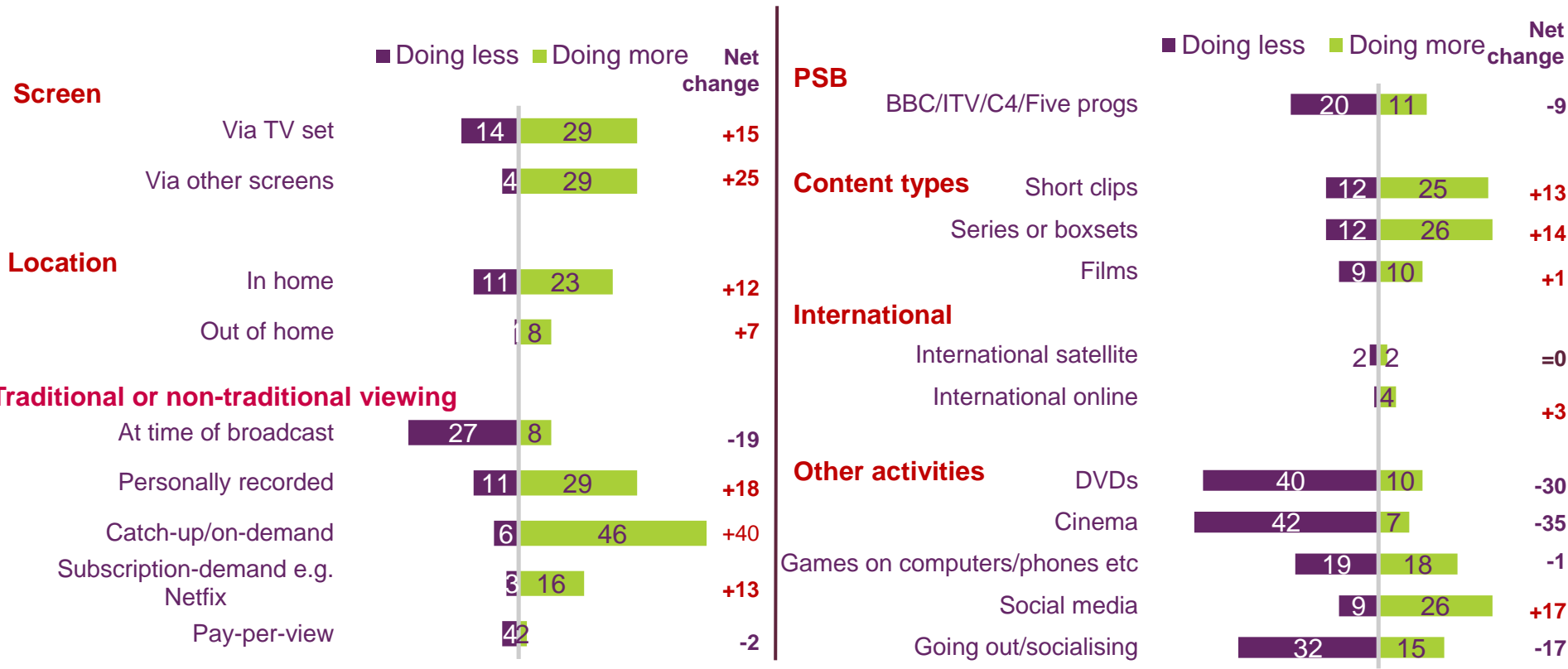
Base: All adults (1878). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago? This reports the 'net gain' or 'net loss' for an activity. For example, if 20% of respondents said they did an activity more and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

Figure 1.18

Claimed changes in viewing behaviour: 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+

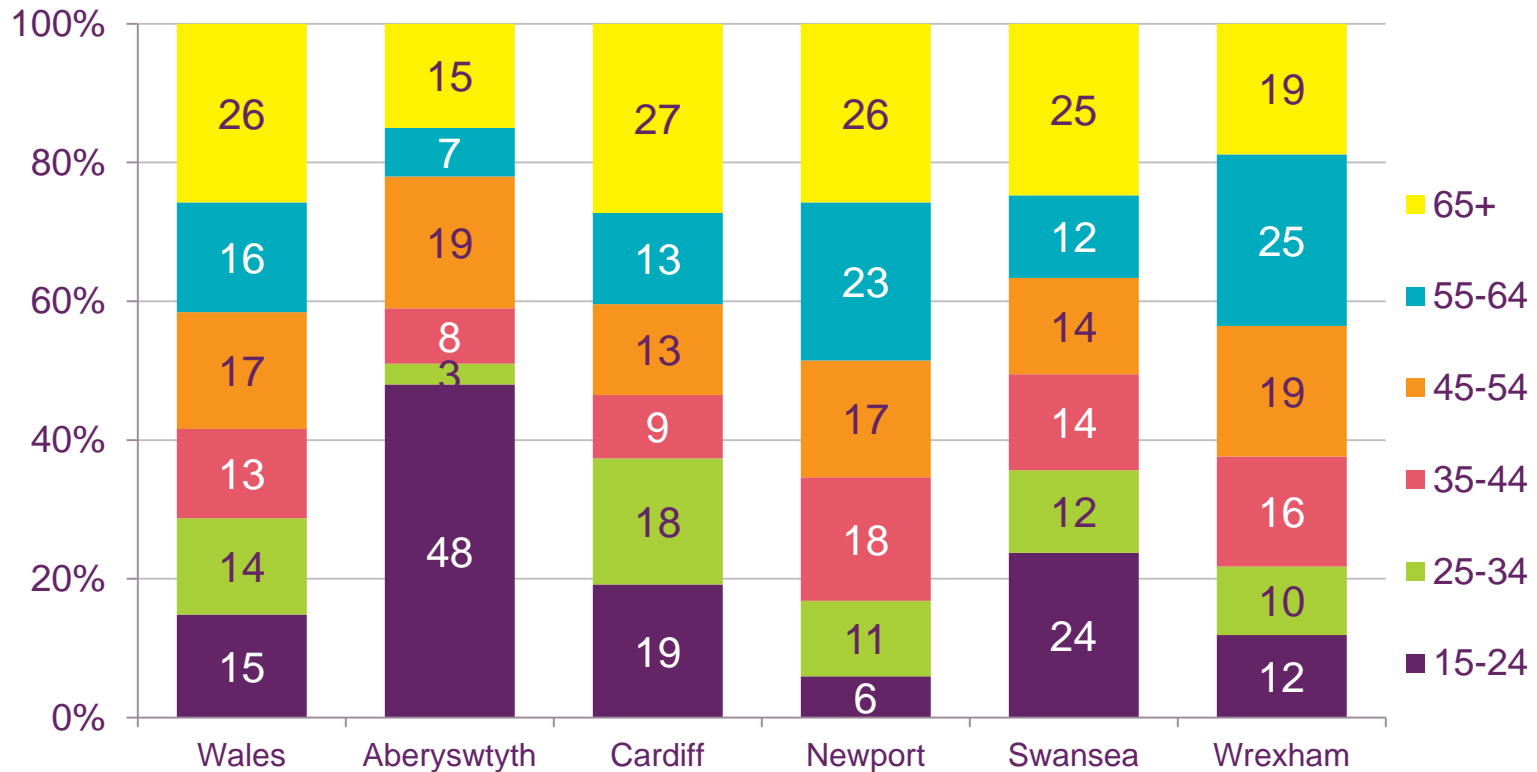
Other activities

- 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

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

Figure 1.19

Age profiles of Wales, Aberystwyth, Cardiff, Newport, Swansea and Wrexham

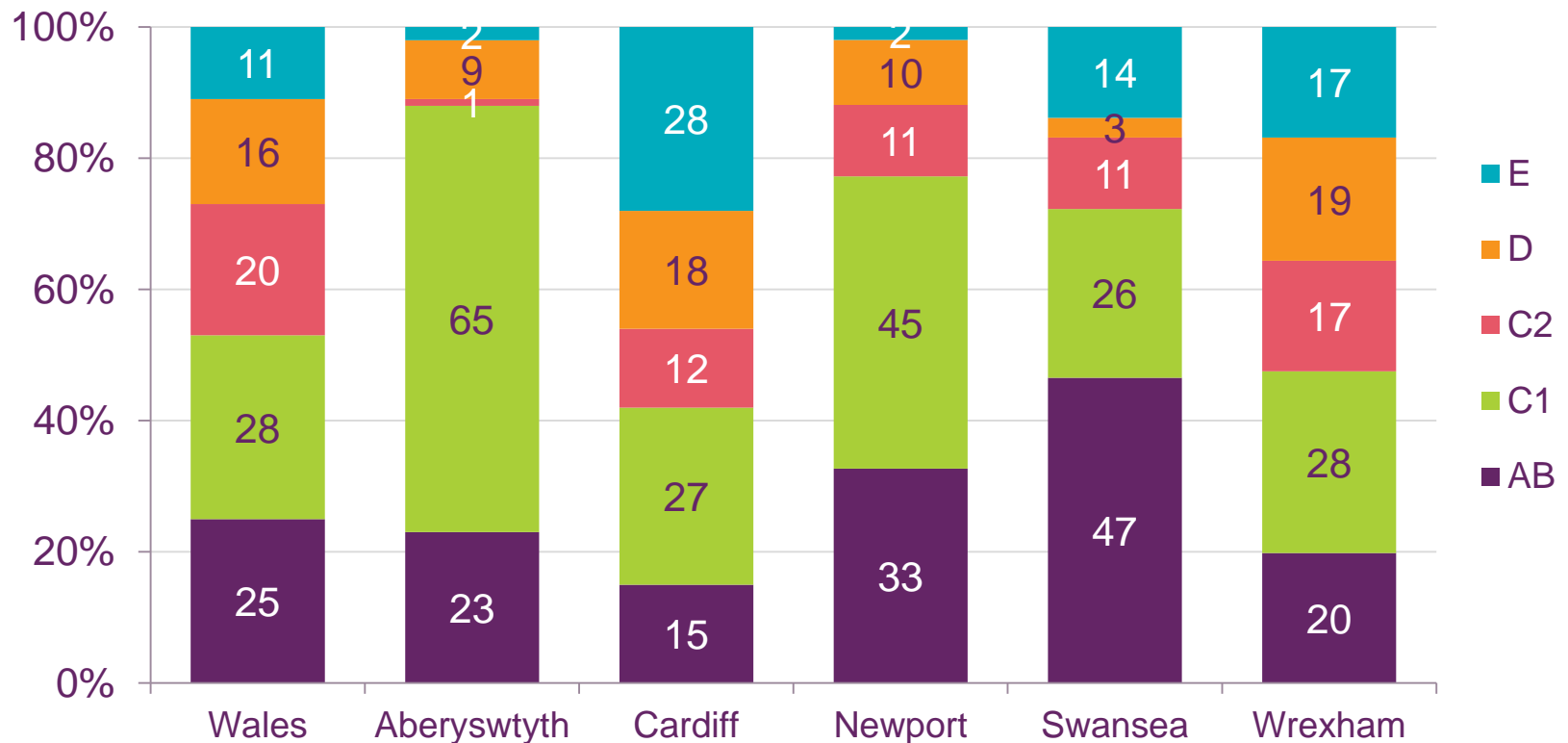


Source: British Population Survey

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

Figure 1.20

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

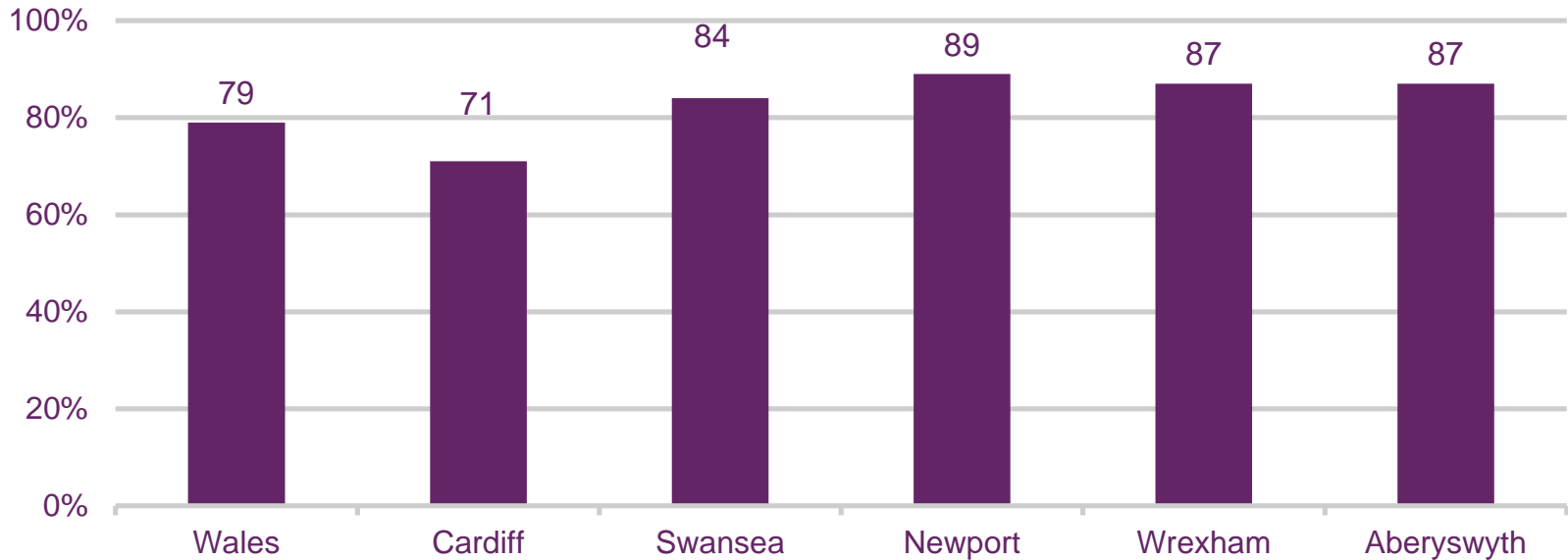


Source: British Population Survey

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

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?

Figure 1.22

Take-up of mobile telephony services in Welsh towns and cities



Source: British Population Survey

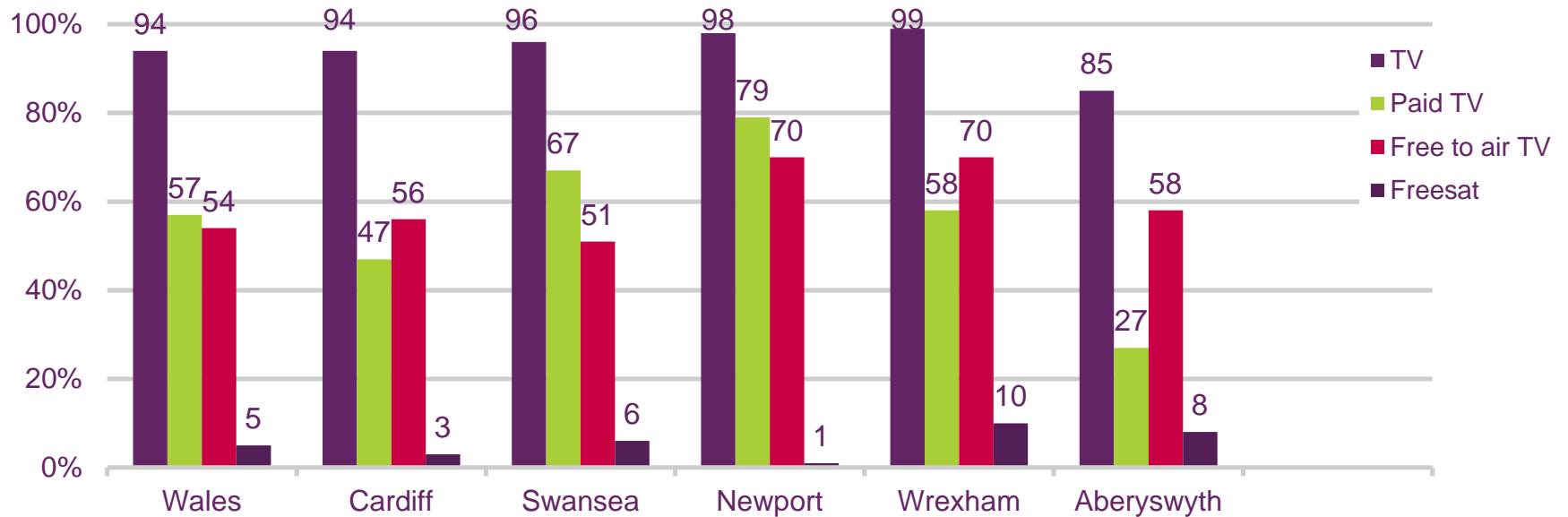
Base: All adults 15+ (Wales 5287, Aberystwyth, 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Q: Do you have a mobile telephone?

Q: Do you have a web-enabled phone?

Figure 1.23

Take-up of TV services in Welsh towns and cities



Source: British Population Survey

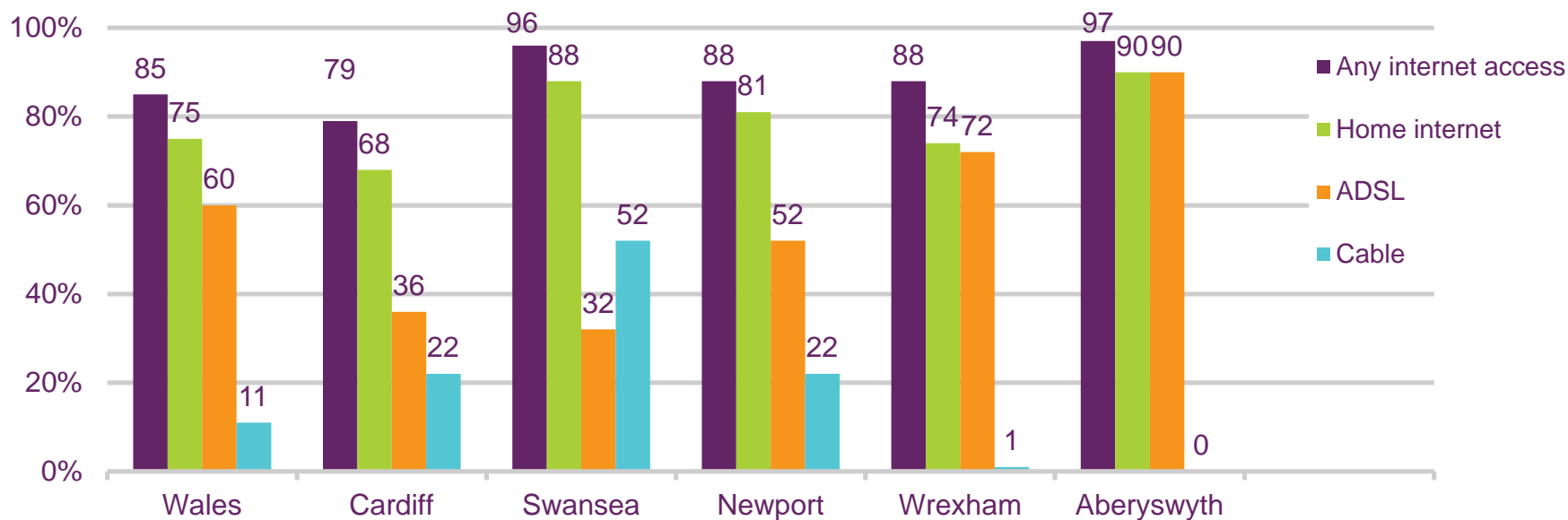
Base: All adults 15+ (Wales 5287, Aberystwyth, 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

Q: Is there a TV in the household?

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

Figure 1.24

Take-up of internet 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)

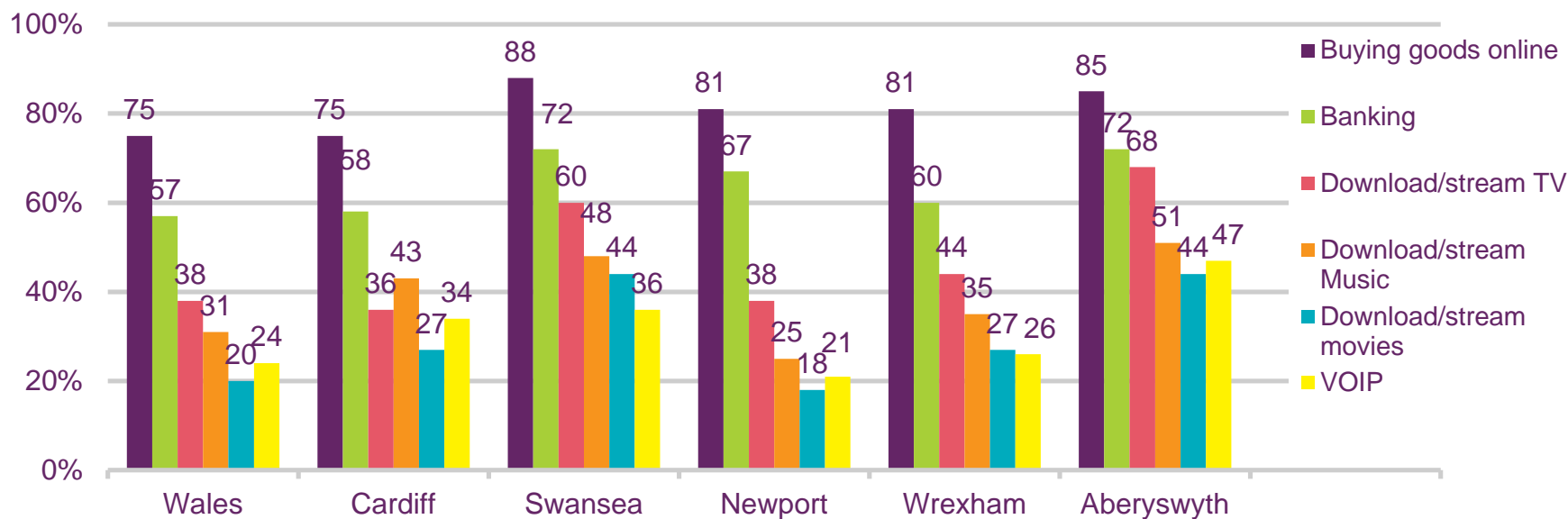
Q: Which of these best describes how frequently you use the internet?

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?

Figure 1.25

Usage of internet services in Welsh towns and cities



Source: British Population Survey

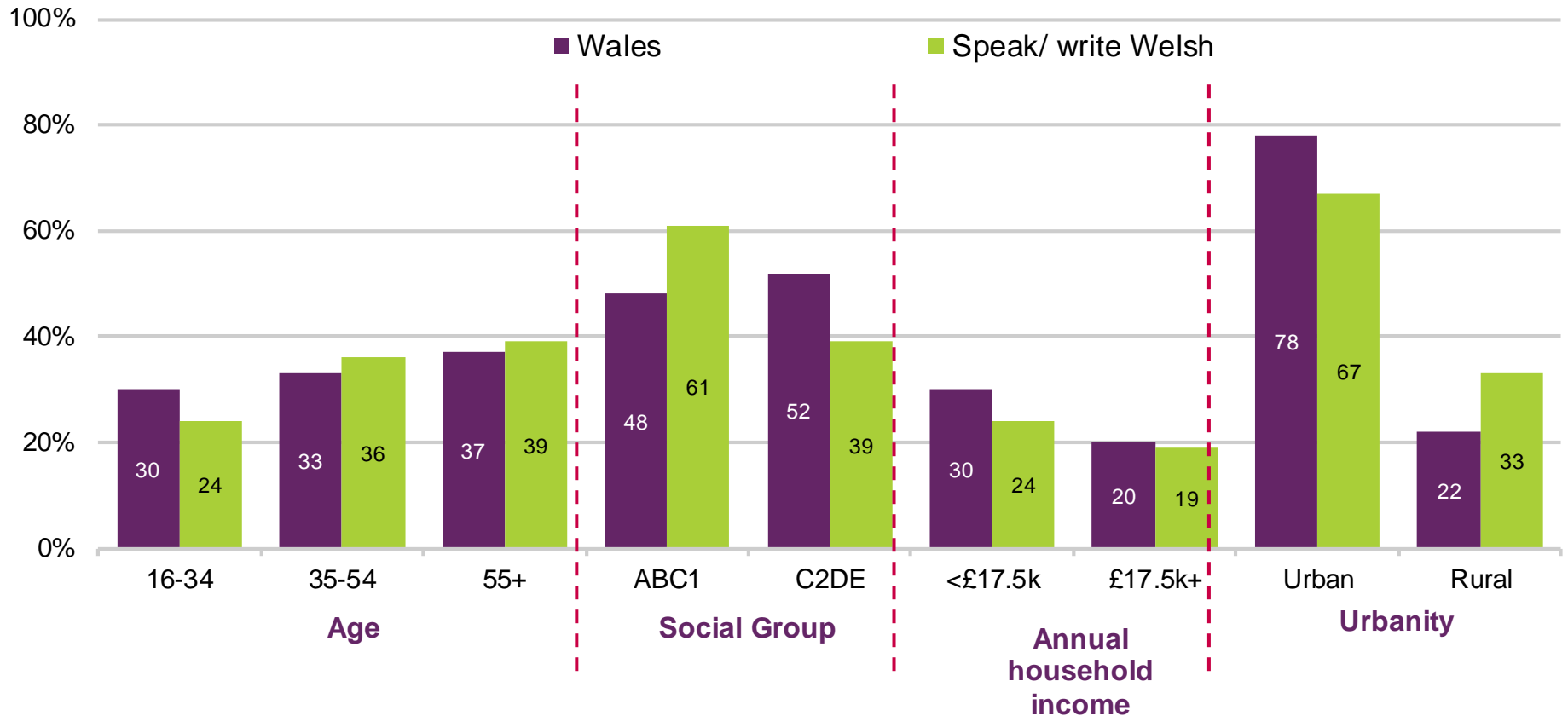
Base: All adults 15+ with internet access (Wales 3460, Aberystwyth, 137, Cardiff 139, Newport 225, Swansea 161 and Wrexham 175)

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

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

Figure 1.26

Demographic profile of those who can speak or write in Welsh



Source: Ofcom Technology Tracker, W1 2015

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

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)
 Arrows indicate 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 Wi-Fi network or phone's mobile network