

# 4 Internet and web-based content

## 4.1 Broadband take-up

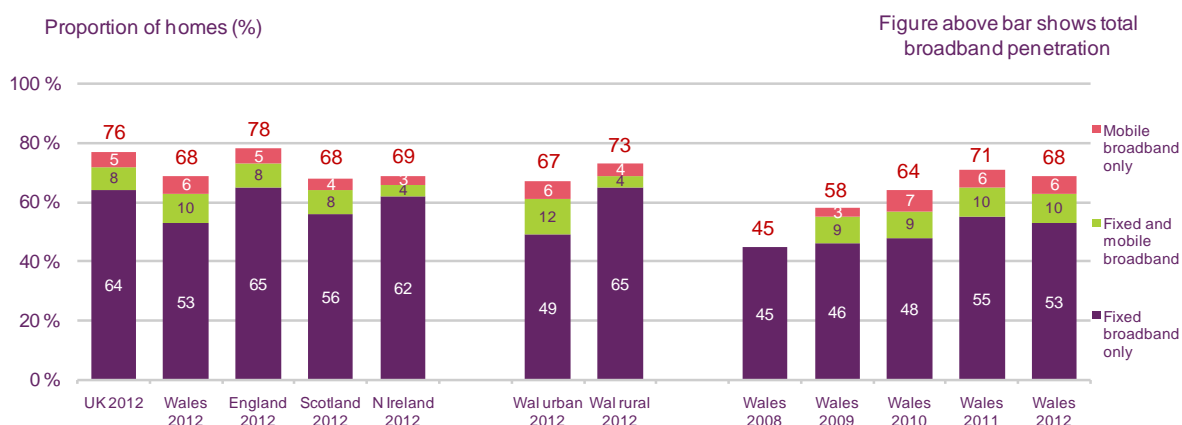
### Rise in broadband take-up in Wales sustained

Last year's rise in broadband take-up in Wales has been sustained. Take-up currently stands at 68%<sup>12</sup>.

There has also been little change in the type of broadband connection consumers are choosing to use across Wales. One in ten homes in Wales has both a mobile broadband connection *and* a fixed broadband connection. Use of mobile broadband in Wales is comparable with the UK average, whereas use of fixed broadband services is significantly lower (63% vs. 72%).

There are indications of differences when comparing use of alternative connection methods across rural and urban parts of Wales. Although the apparent differing levels of broadband penetration are not statistically significant, there are indications that fixed broadband may be driving some take-up in rural areas and mobile dongle-based broadband driving some take-up in urban areas.

**Figure 4.1 Broadband take-up at home**



Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 513 Wales, 2251 England, 500 Scotland, 508 Northern Ireland, 249 Wales urban, 264 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012)

QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

### Broadband take-up is lowest among over-55s and DE households

As in the rest of the UK, broadband take-up in Wales varies significantly by demographic group and is lower among similar groups i.e. older, lower income, households without children.

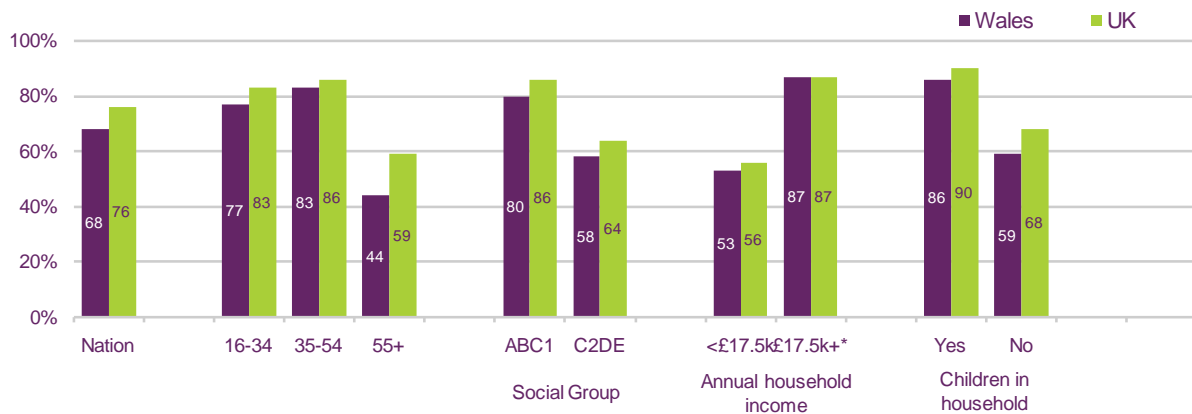
However, take-up in Wales is even lower than average among some of these groups; in particular, those aged 55+ (44%) and C2DEs (58%). Other demographic groups

<sup>12</sup> Total broadband take up consists of those households with fixed and/or mobile broadband.

demonstrating lower than average take-up of broadband in Wales are those aged 16-34 (77% vs. 83%) and ABC1s (80% vs. 86%).

In contrast, households in Wales with children report levels of broadband take-up comparable with the UK average (86% vs. 90%). Adults aged 35-54 and households with an annual income in excess of £17.5K also report levels of broadband take-up consistent with the UK average.

**Figure 4.2 Broadband take-up in Wales, by demographic**



Source: Ofcom research, Quarter 1 2012

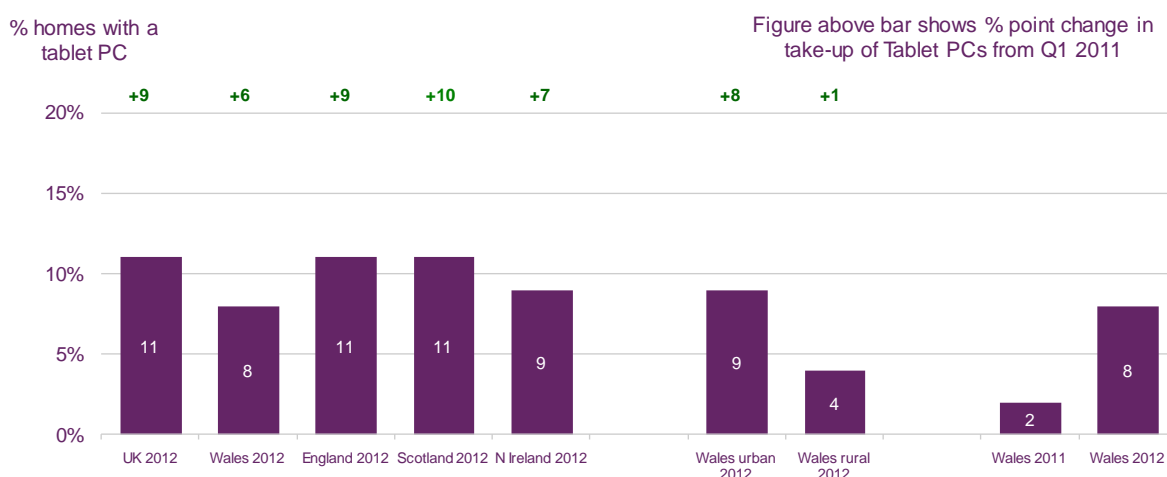
Base: All adults aged 16+ (n =513 Wales, 161 16-34s, 156 35-54s, 195 55+, 264 ABC1, 249 C2DE, 198 <£17.5k income, 92 £17.5k+, 174 children in home, 339 no children in home) \* Caution low base QE9. Which of these methods does your household use to connect to the internet at home?

## 4.2 Internet -enabled devices

### 8% of adults in Wales have purchased a tablet computer in the past year

Tablet computer ownership has increased rapidly across the UK in the past year. In Q1 2012, 8% of adults in Wales claimed to have a tablet PC, an annual increase of 6 percentage points. Those most likely to have purchased a tablet PC are male, living in rural areas, aged 34-54 and in households with income above £17.5K.

**Figure 4.3 Tablet computer take-up in Wales**



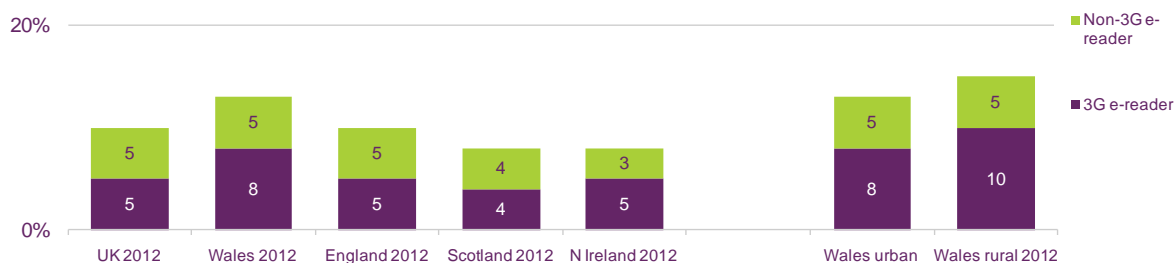
Source: Ofcom research, Q1 2012

Base: All adults aged 16+ (n = 3772 UK, 513 Wales, 2251 England, 500 Scotland, 508 Northern Ireland). Question: Does your household have a PC, laptop, netbook or tablet computer?

### 13% of adults in Wales have an e-reader

Just over one in ten (13%) adults in Wales have an e-reader that they can use to read books, magazines and other text downloaded from the internet. More than half of those with an e-reader have a built-in 3G connection, which allows them to download books using a mobile network. Those aged between 35 and 54 and in ABC1 social groups are the most likely to own an e-reader.

**Figure 4.4 Ownership of e-readers in Wales**



Source: Ofcom research, Q1 2012 Base: All adults aged 16+ (n = 3772 UK, 513 Wales, 2251 England, 500 Scotland, 508 Northern Ireland) Question: Which of the following do you, or does anyone in your household, have in your home at the moment?/ QB2. And do you personally use.../ QB6. Does your household's e-reader have built-in 3G access to a mobile network?

## 4.3 Internet use

### Over half of adults in Wales use social networking sites

Despite relatively stable ownership of broadband over the past 12 months, use of social networks has continued to rise. More than half (53%) of adults in Wales use one of these. The majority of those who used social networking sites had done so in the past week.

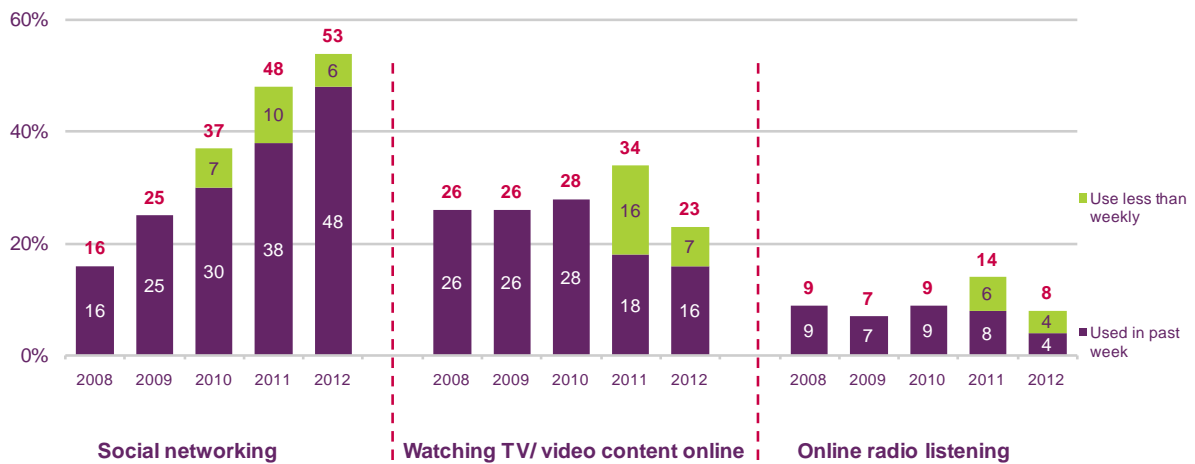
Following a high last year, when around a third of adults in Wales said they used the internet to watch TV or video content, use has returned to previous levels of around a quarter. Use of the internet to watch TV or video content in Wales remains lower than the UK average (25%)

vs. 47%). The proportion of weekly viewers in Wales (16%) stands at just over half the UK average (28%).

Online TV viewing in Wales is driven by watching video clips/webcasts. All adults citing this activity said they watch this type of content. The recent decline in onlineTV/video viewing in Wales appears to have been driven by the decline in use of the internet to watch catch-up TV; again, use in Wales is around half the UK average (17% vs. 30%)<sup>13</sup>.

Around one in ten (8%) adults say they listen to online radio, lower than the levels reported last year, but comparable with 2010.

**Figure 4.5 Use of internet applications in Wales**



Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

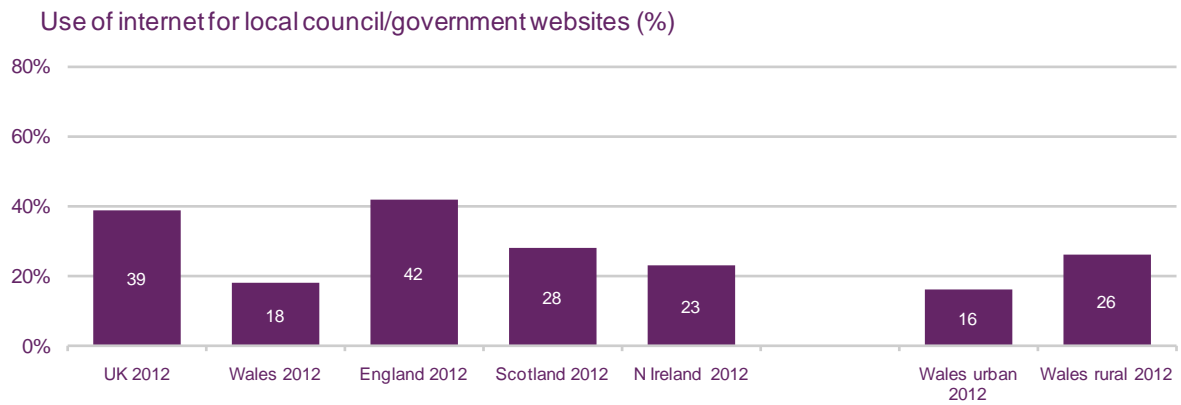
Questions. Which, if any, of these do you or members of your household use the internet for whilst at home?/ Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging

### Adults in Wales least likely to access government websites

Less than a fifth (18%) of adults in Wales claim to use the internet to access local council or government websites (Figure 4.6). This is lower than in England (42%), where broadband take-up is higher, but also lower than in Scotland (28%) and Northern Ireland (23%) where broadband take-up is at a comparable level. However, local government websites appear to be used more in rural areas than in urban areas.

<sup>13</sup> Use of catch-up TV may be seasonal/affected by particular programmes, so annual trend data should be viewed with this in mind

**Figure 4.6 Use of internet to access local council/ government websites**



*QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?*

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 1734 England, 363 Wales, 361 Scotland, 365 Northern Ireland, 176 Wales urban, 187 Wales rural)