

Wales – The Communications Market Report 2016

Chart Pack

Wales' communications market

1. Market in Context

Key facts about Wales

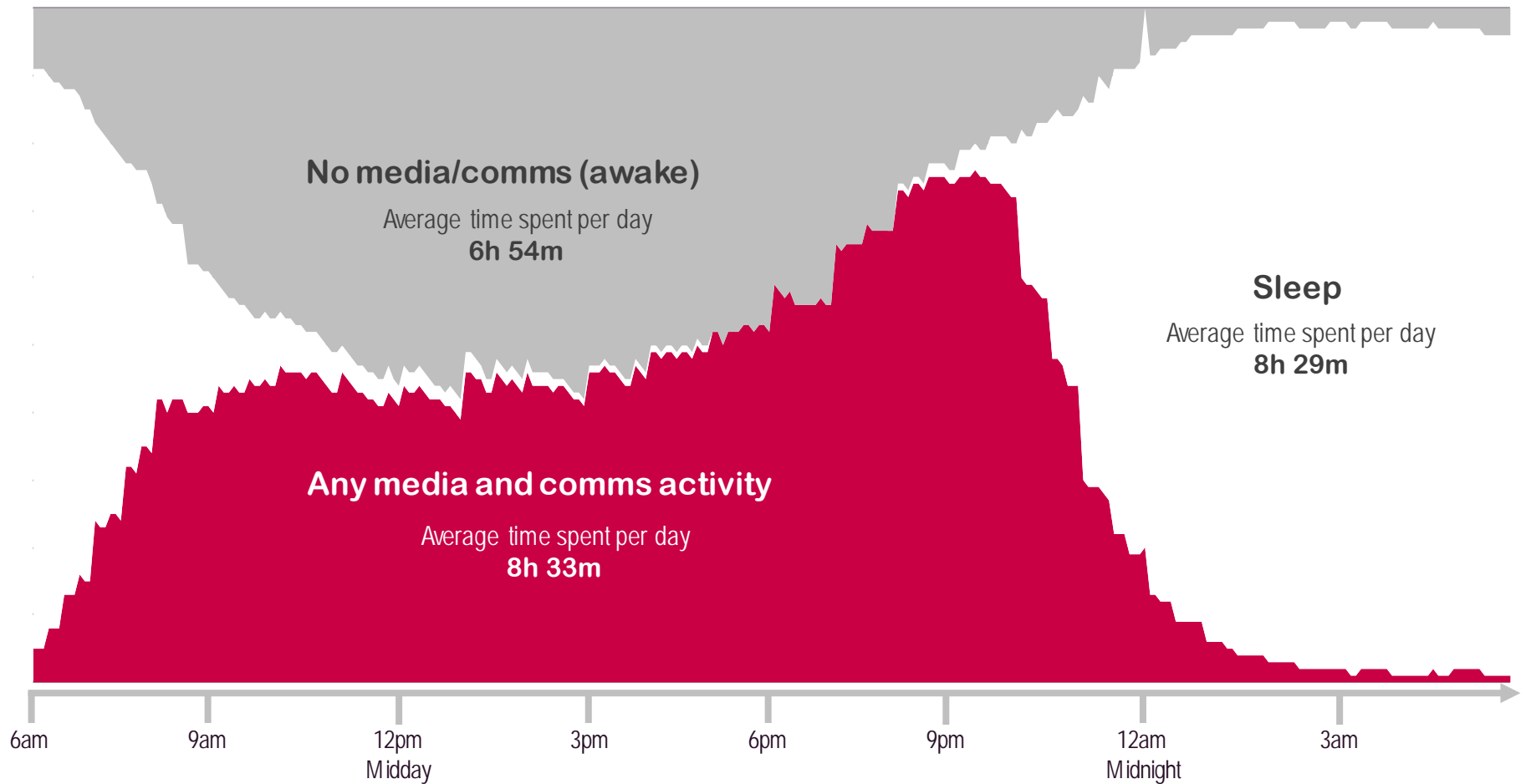
Figure	Wales	UK
Population	3.099 million (mid-2015 estimate)	65.11 million (mid-2015 estimate)
Age profile	Population aged <16: 17.9% Population aged 65+: 20.2%	Population aged <16: 18.8% Population aged 65+: 17.8%
Population density	149.5 people per square kilometre	269 people per square kilometre
Language	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

Digital Day

Figure 1.2

Media and comms versus non-media and comms activity, by time of day Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 6: D13 for main chart data, and Data book 1: B4 for average time spent per day

Adult diary: Chart shows the proportion of activity attributed to media & comms activity (D), sleep (C) and non-media & comms for each time slot across a week.

Base: Adults aged 16+ in Wales (176)

Figure 1.3

Average daily media and comms time, by nation



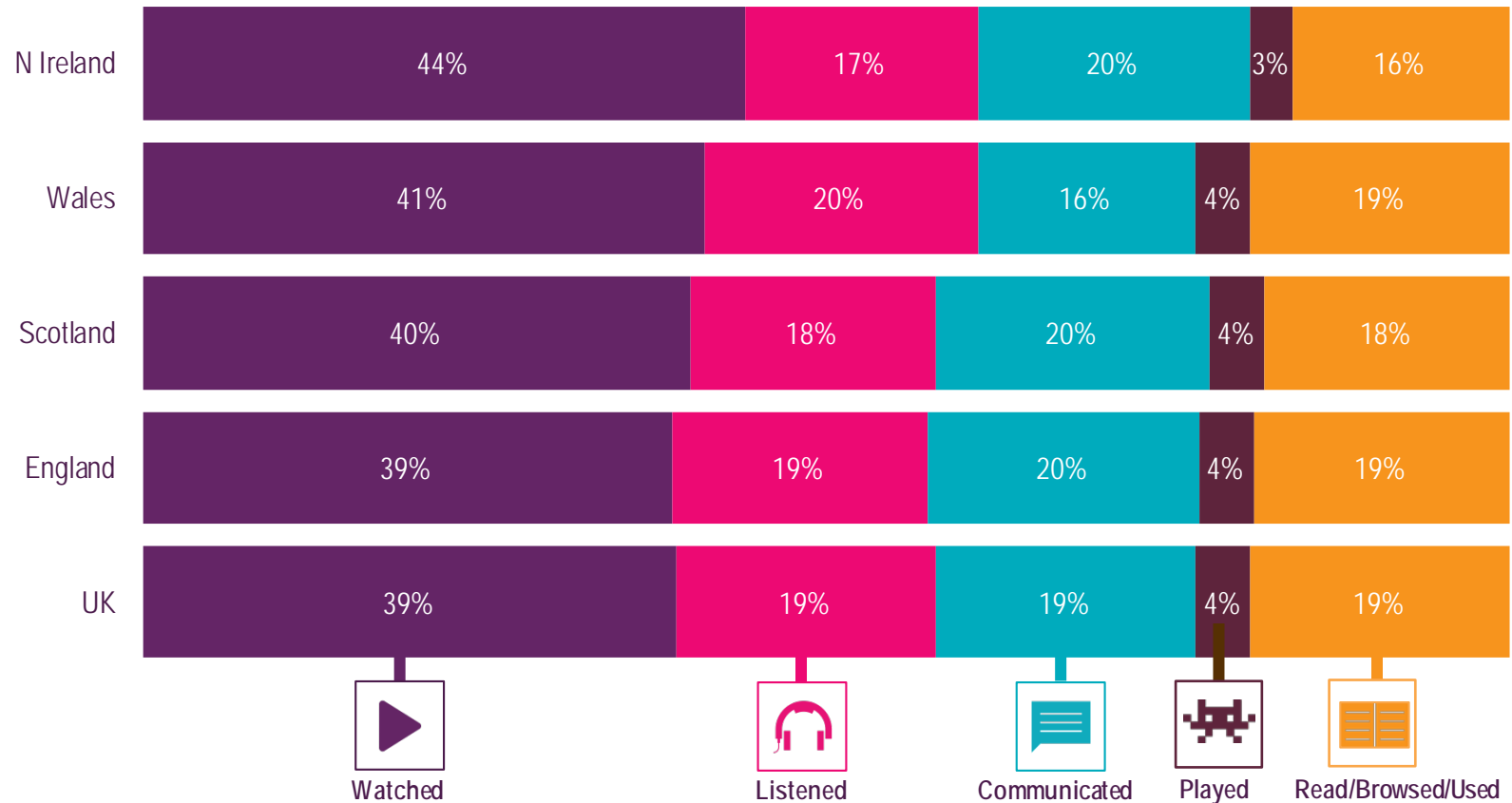
Source: Ofcom Digital Day 2016, Data book 1: B4(2)

*The total average (inc. simultaneous activity) is calculated by summing together the duration (B2) for each activity, dividing by the weighted base of respondents, and then by 7 days. The actual average net time spent (equivalent to solus) is then deducted in order to gauge simultaneous activity time. i.e. time spent doing more than one activity at the same time.

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

Figure 1.4

Proportion of media and comms time attributed to activity types, by nation



Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

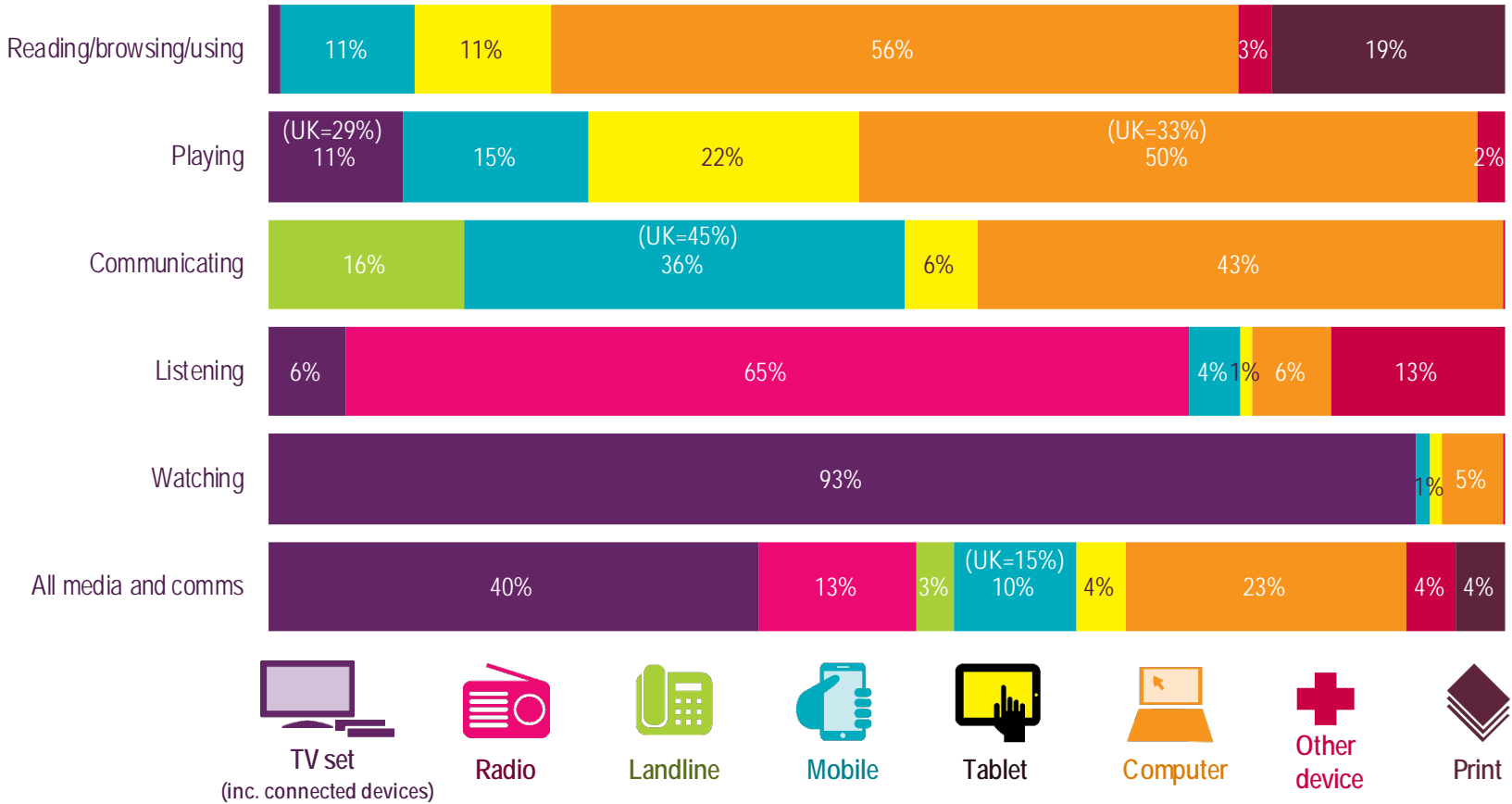
Adult diary: Chart shows the proportion of all media and comms time (B2) attributed to each activity type by nation

*The average weekly minutes figure is among those who did any media and comms activity across their diary week and also includes simultaneous activity

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

Figure 1.5

Proportion of time spent on activity types attributed to devices Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016 , Data book 3: C29 for main chart data and Data book 1: B1 for average weekly minutes

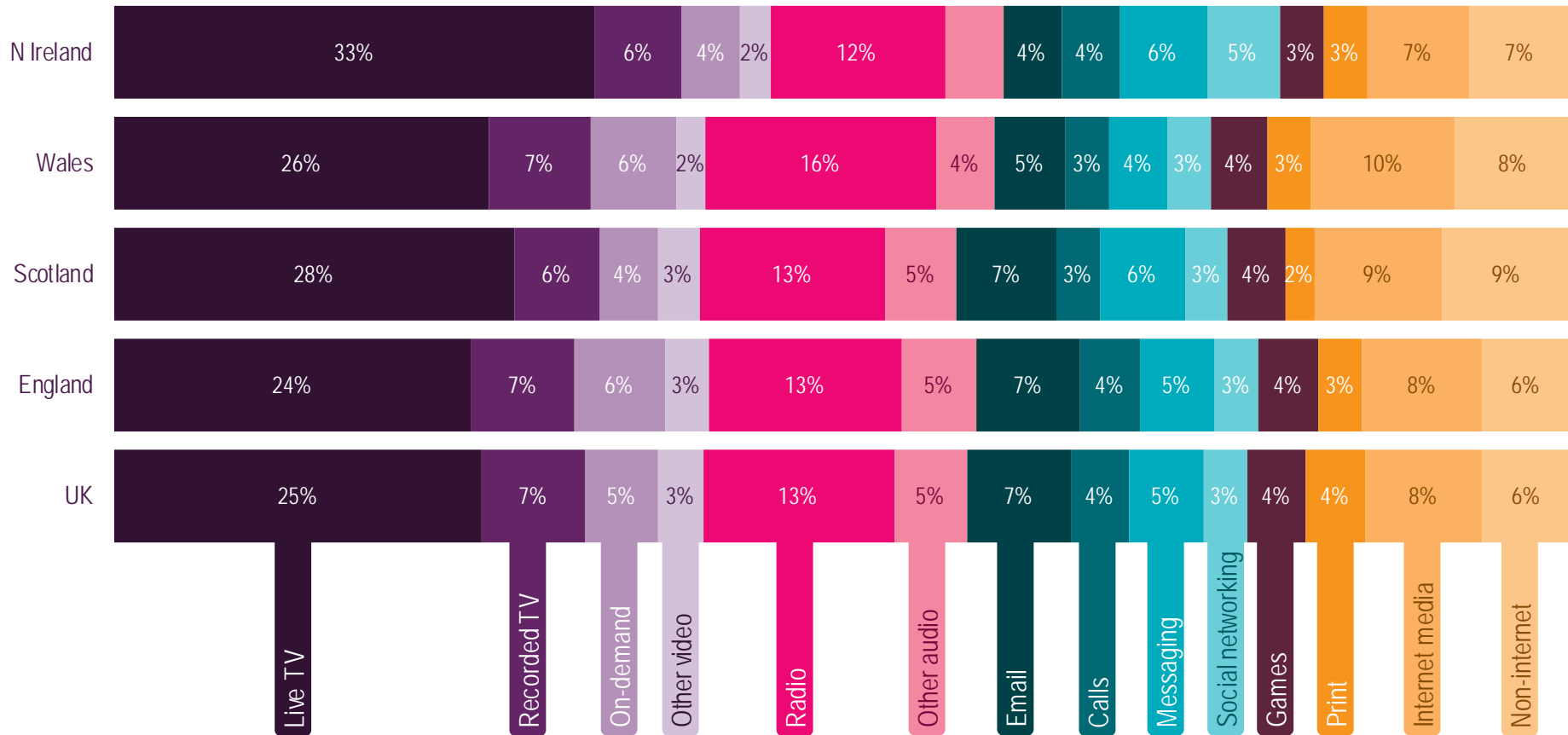
Adult diary: Chart shows the proportion of all time spent on activity types (B2) attributed to each device

*The average daily minutes figure is among those who did each type of activity at all across their diary week, and also includes simultaneous activity

Base: Adults aged 16+ in Wales (176)

Figure 1.6

Proportion of media and comms time attributed to activities, by nation



Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

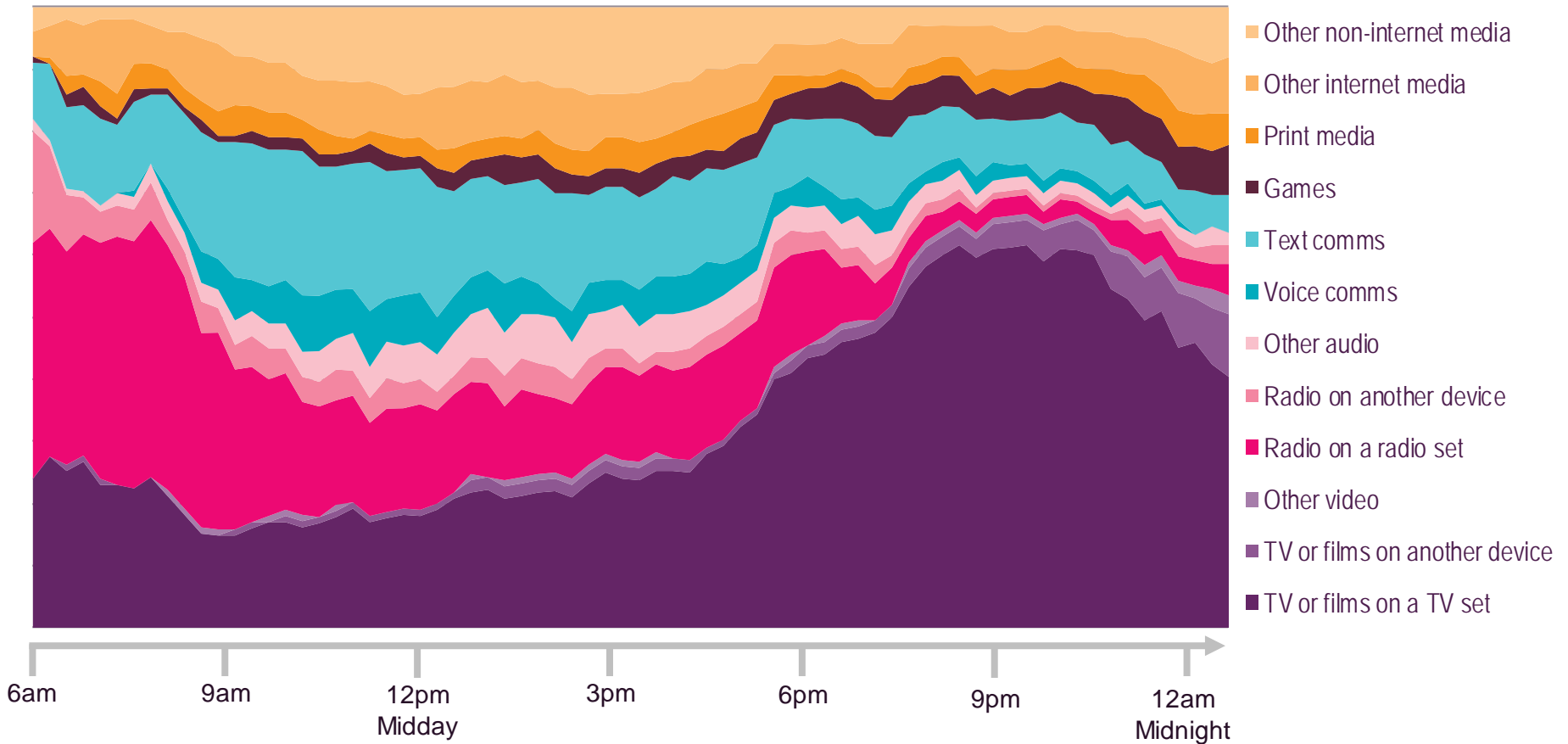
Adult diary: Chart shows the proportion of all media and comms time (B2) attributed to activities by age group.

Note: Messaging includes texts (SMS), Instant Messaging (IMS) and Photo/video messaging (MMS). Calls includes both phone calls and video calls (VoIP)

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

Figure 1.7

Proportion of media and comms attributed to grouped activities, by time of day Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 6: B13

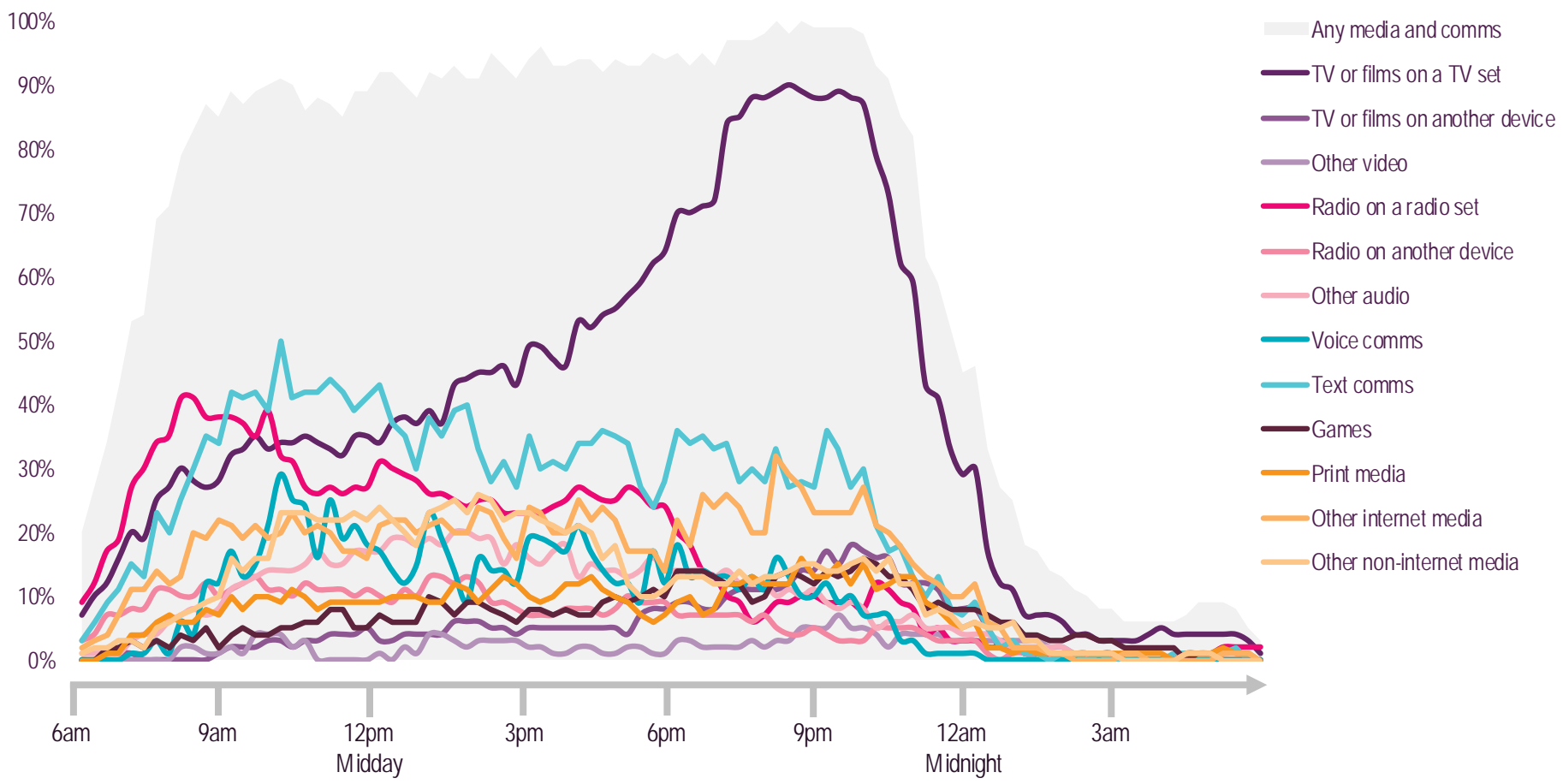
Adult diary: Chart shows the proportion of all media and comms activity attributed to each grouped activity for each time slot across a week.

Note: the base of media and comms activity varies by time, and so relatively low activity during late night time periods should be treated with caution

Base: Adults aged 16+ in Wales (176)

Figure 1.8

Weekly reach of grouped activities, by time of day Among adults 16+ in Wales



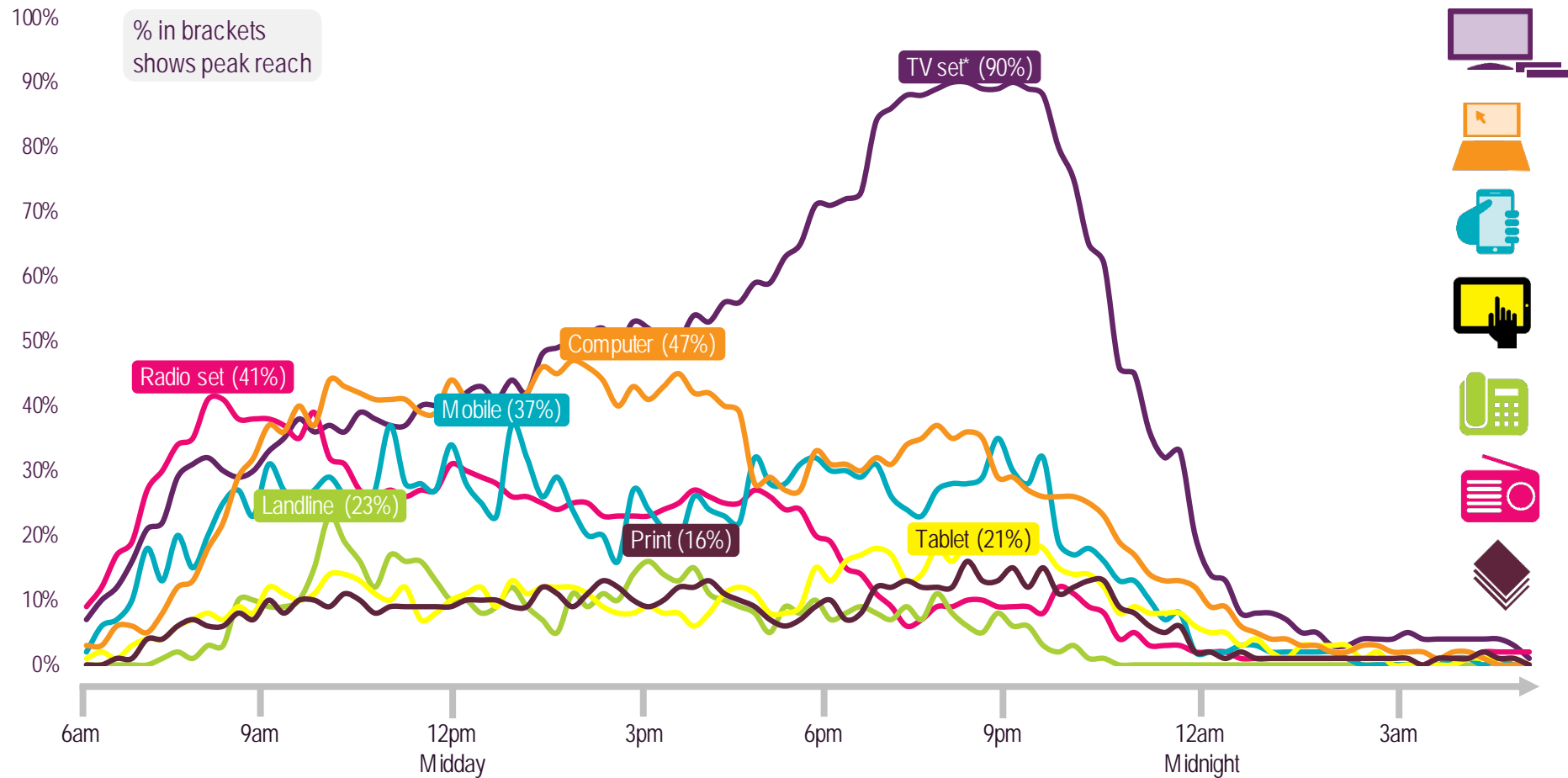
Source: Ofcom Digital Day 2016, Data book 6: A13

Adult diary: Chart shows the proportion of adults who recorded each grouped activity (D) at each time slot across a week.

Base: Adults aged 16+ in Wales (176)

Figure 1.9

Weekly reach of devices, by time of day Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 7: A13

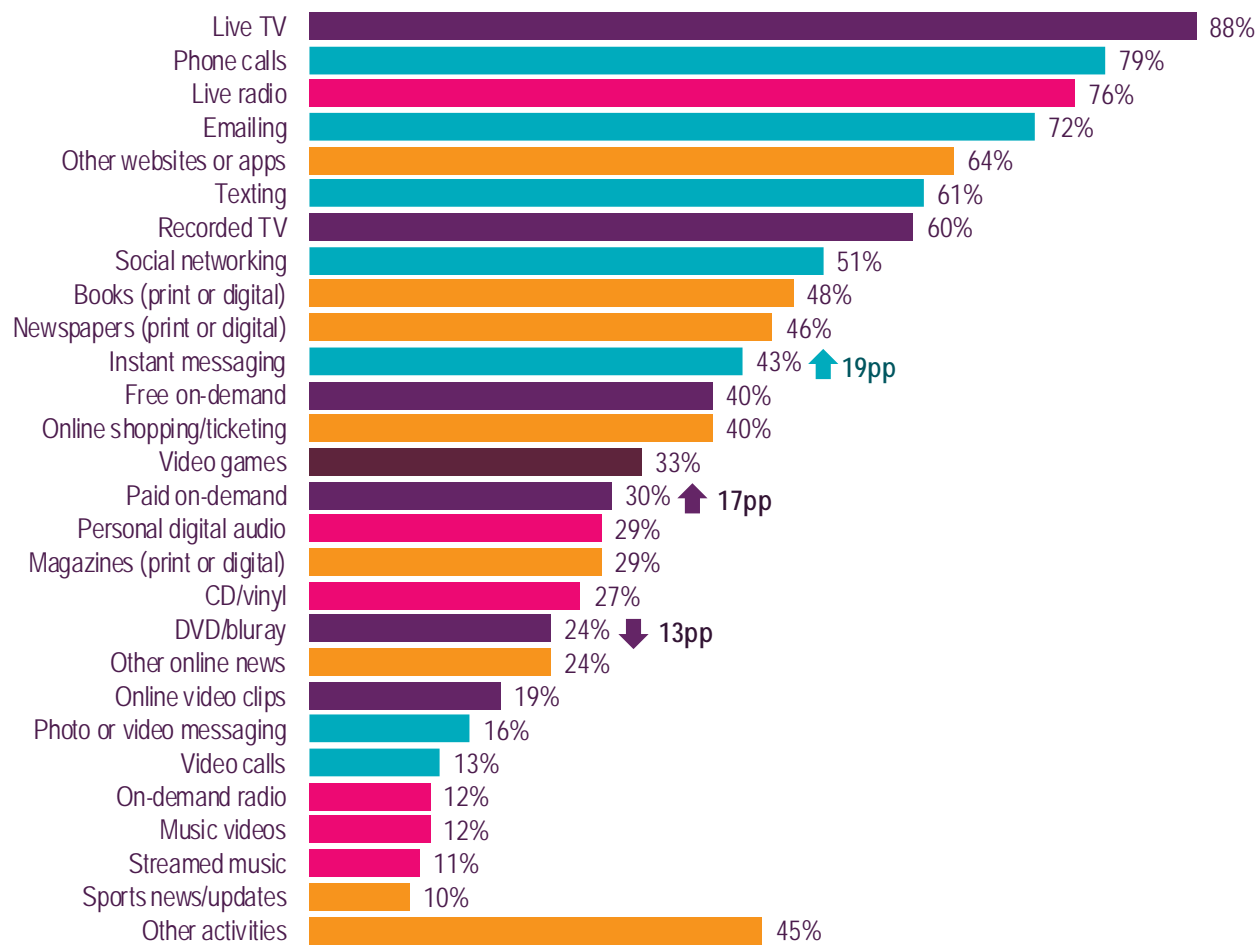
Adult diary: Chart shows the proportion of adults who recorded using each device (E) at each time slot across a week.

* TV set includes all connected devices (games consoles, set top boxes, DVD/Blu-ray player and streaming media players)

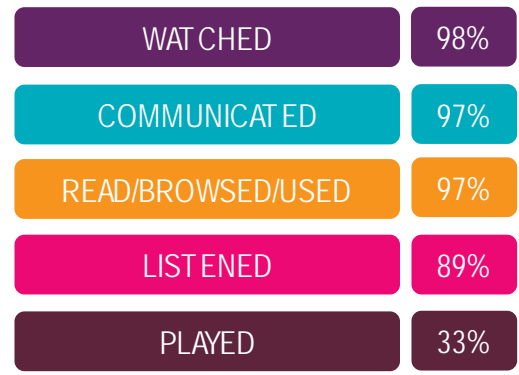
Base: Adults aged 16+ in Wales (176)

Figure 1.10

Weekly reach of media and comms activities Among adults 16+ in Wales



↑ ↓
Arrows indicate significant changes since 2014 (99% level)



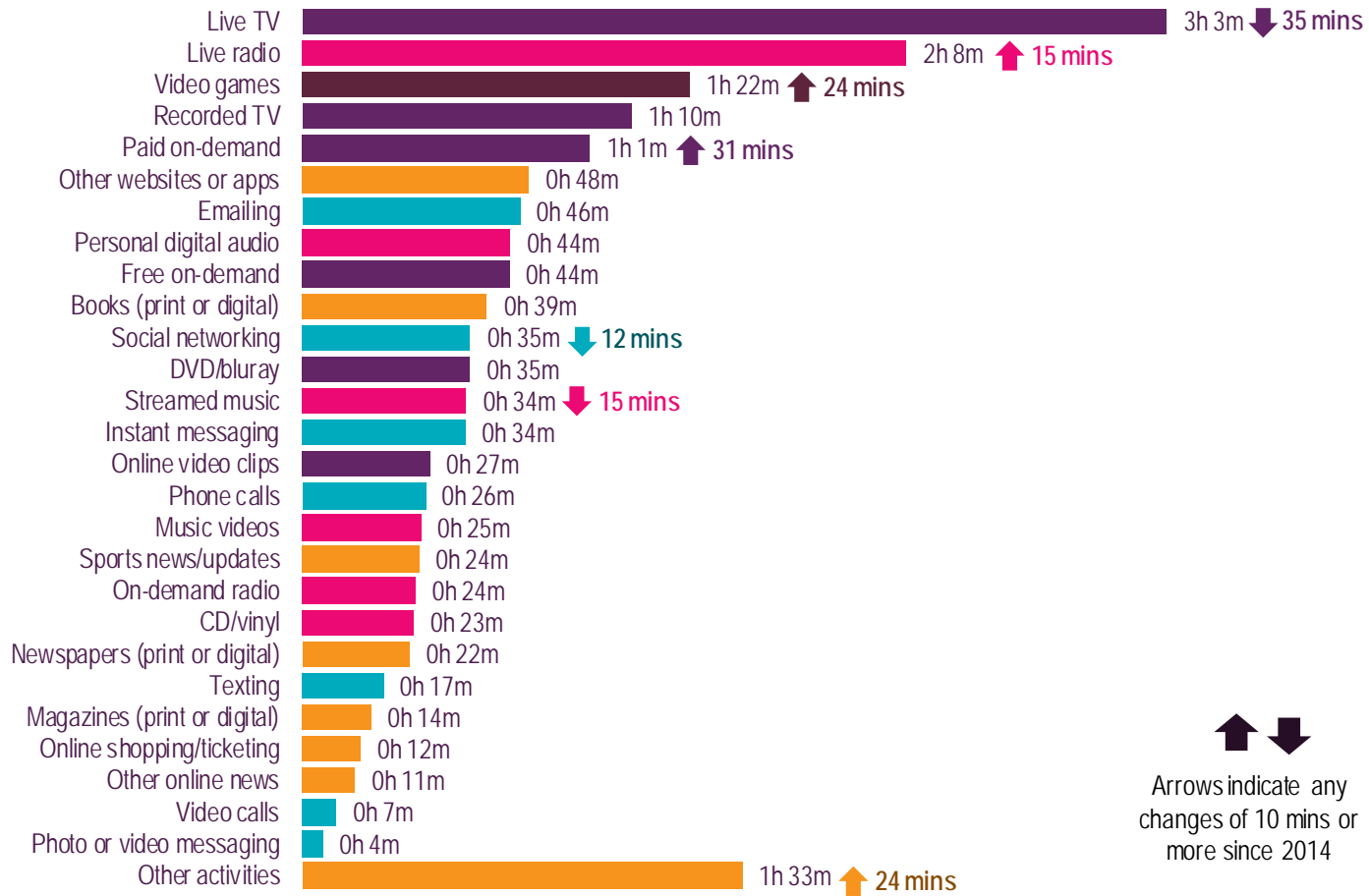
Source: Ofcom Digital Day 2016, Data book 1: A1

Adult diary: Chart shows the proportion of adults who recorded each activity (D) at any point across their diary week.

Base: Adults aged 16+ in Wales (176)

Figure 1.11

Average time spent on activities per day - Wales Among those who did activity at all over a week



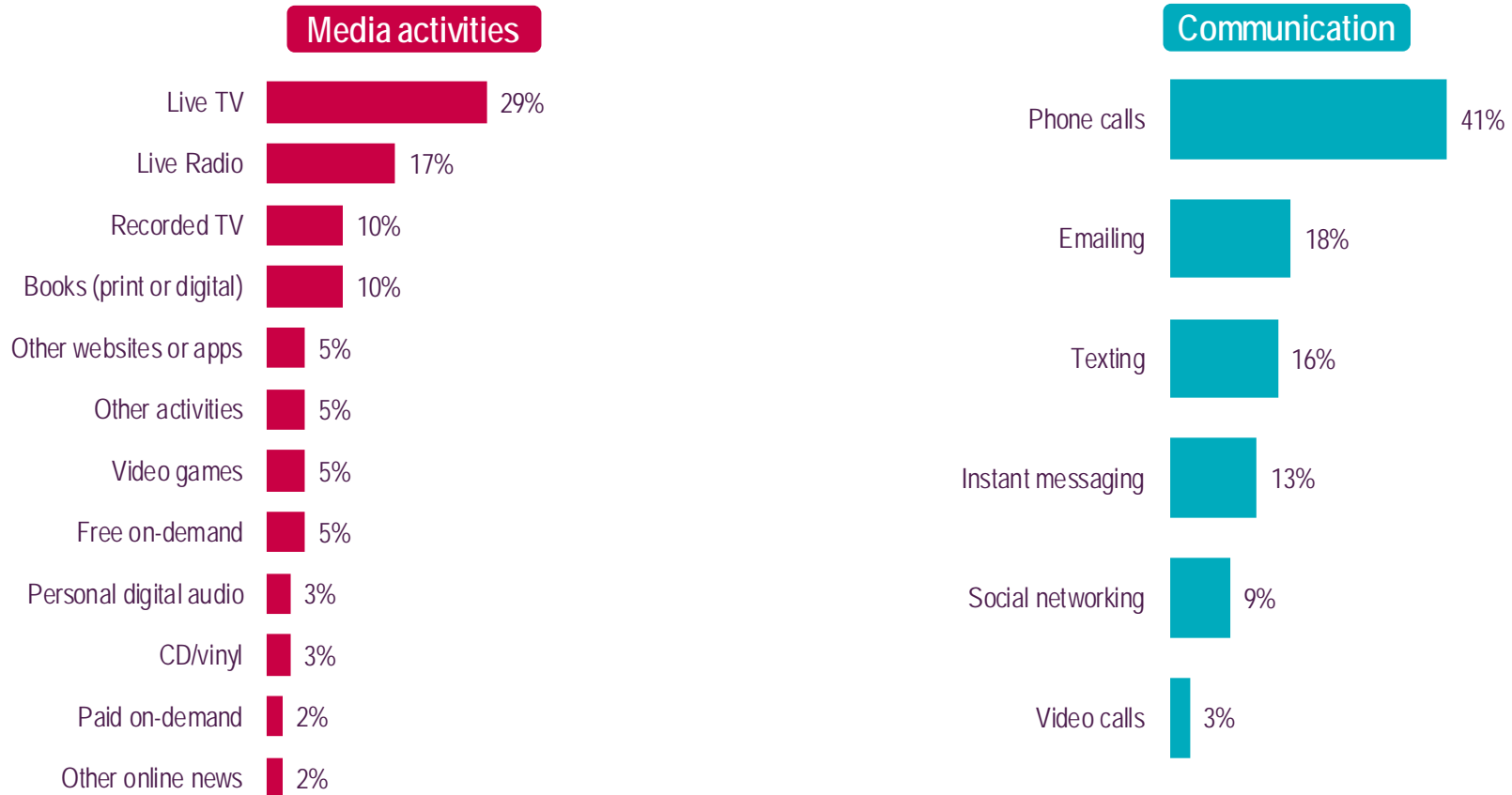
Source: Ofcom Digital Day 2016, Data book 1: B4

Adult diary: Chart shows the mean number of minutes recorded per day for each activity (D) among those who did each one at any point across their diary week i.e. excludes zeros.

Base: Adults aged 16+ in Wales (176)

Figure 1.12

Media and comms activities cited as being of highest personal importance Among adults aged 16+ in Wales



Source: Ofcom Digital Day 2016, Data book 9: A2

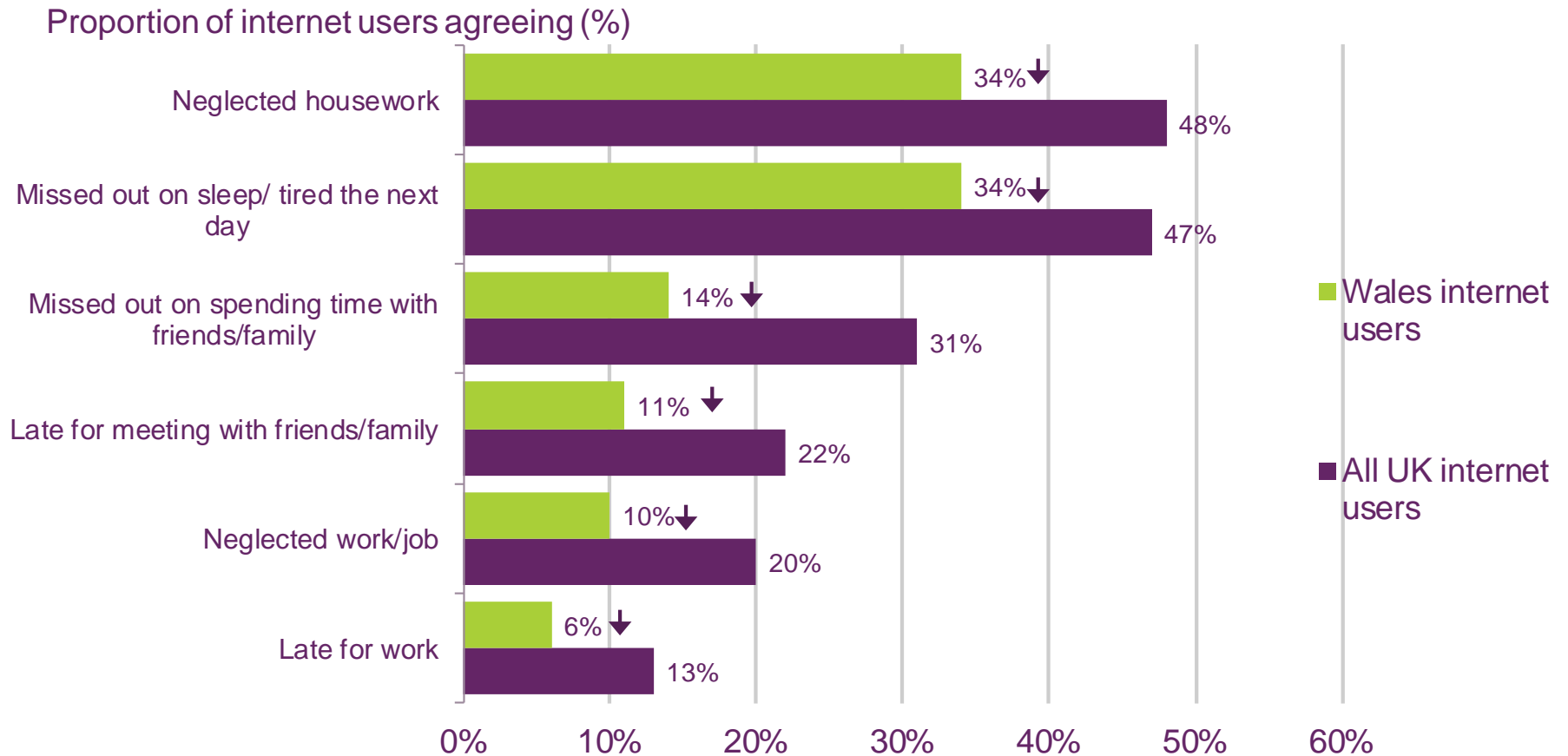
Follow up survey: A2A. Which of the following media activities is most important to you personally?

A2B. Which of the following communication activities is most important to you personally? Only responses above 1% are charted

Base: Adults aged 16+ in Wales (176)

Coping in a connected society

Figure 1.13: Negative effects caused by too much time online



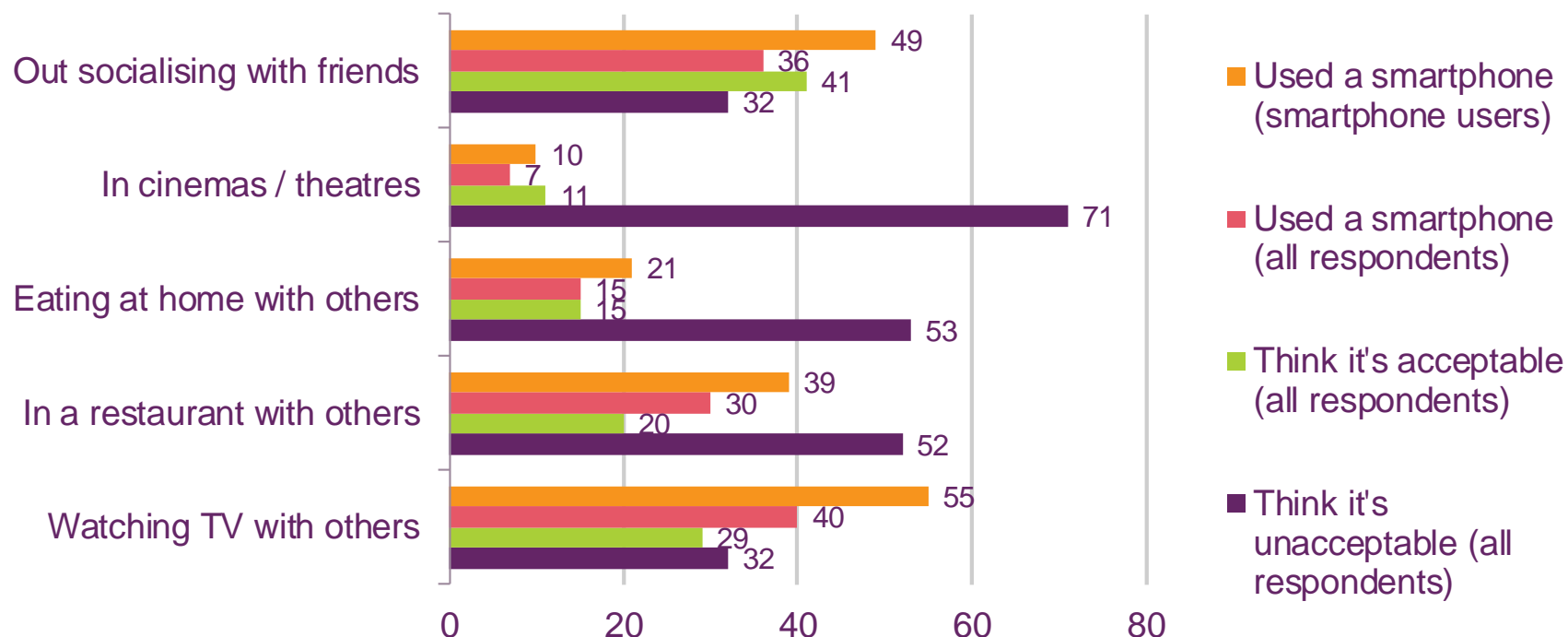
Source: Ofcom research 2016

Base: All going online at least once a month (All: 1,861, 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?

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

Proportion of respondents (%)



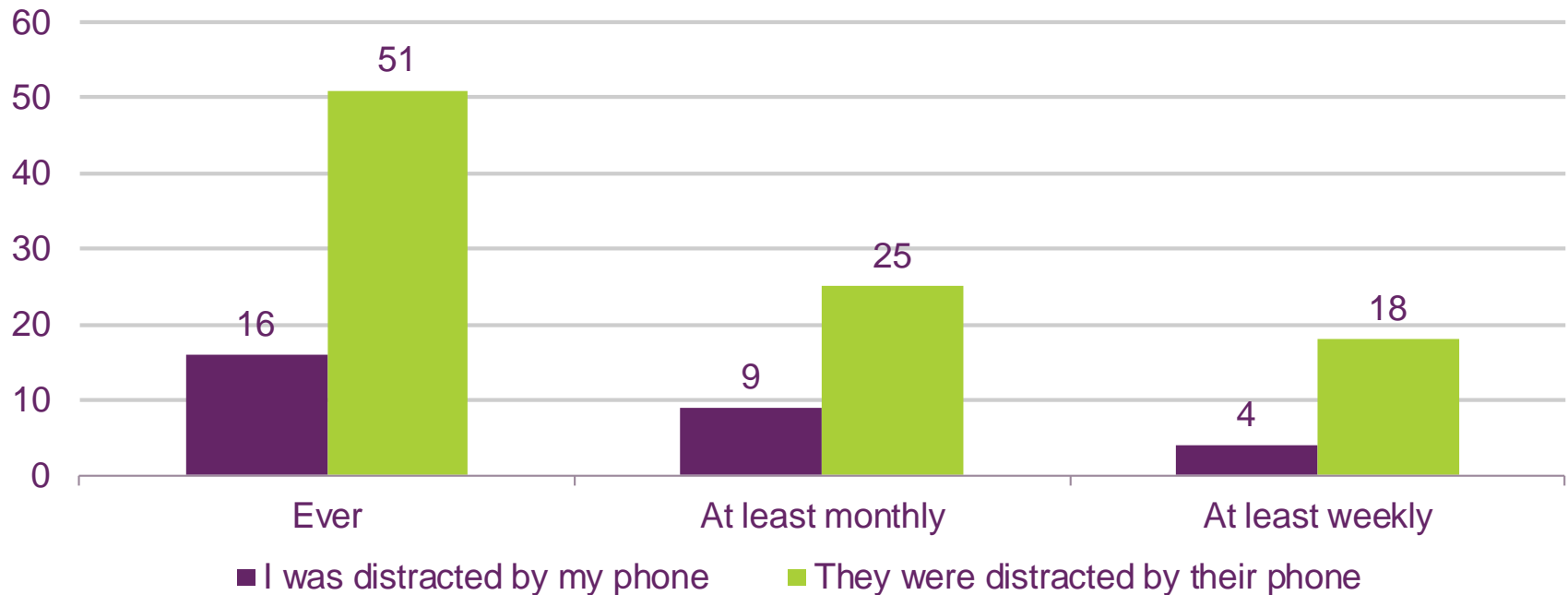
Source: Ofcom research, 2016

Base: All (Wales: 110), smartphone users (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?

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

Proportion of respondents (%)



Source: Ofcom research, 2016

Base: All (Wales: 119) and all phone users (Wales: 107)

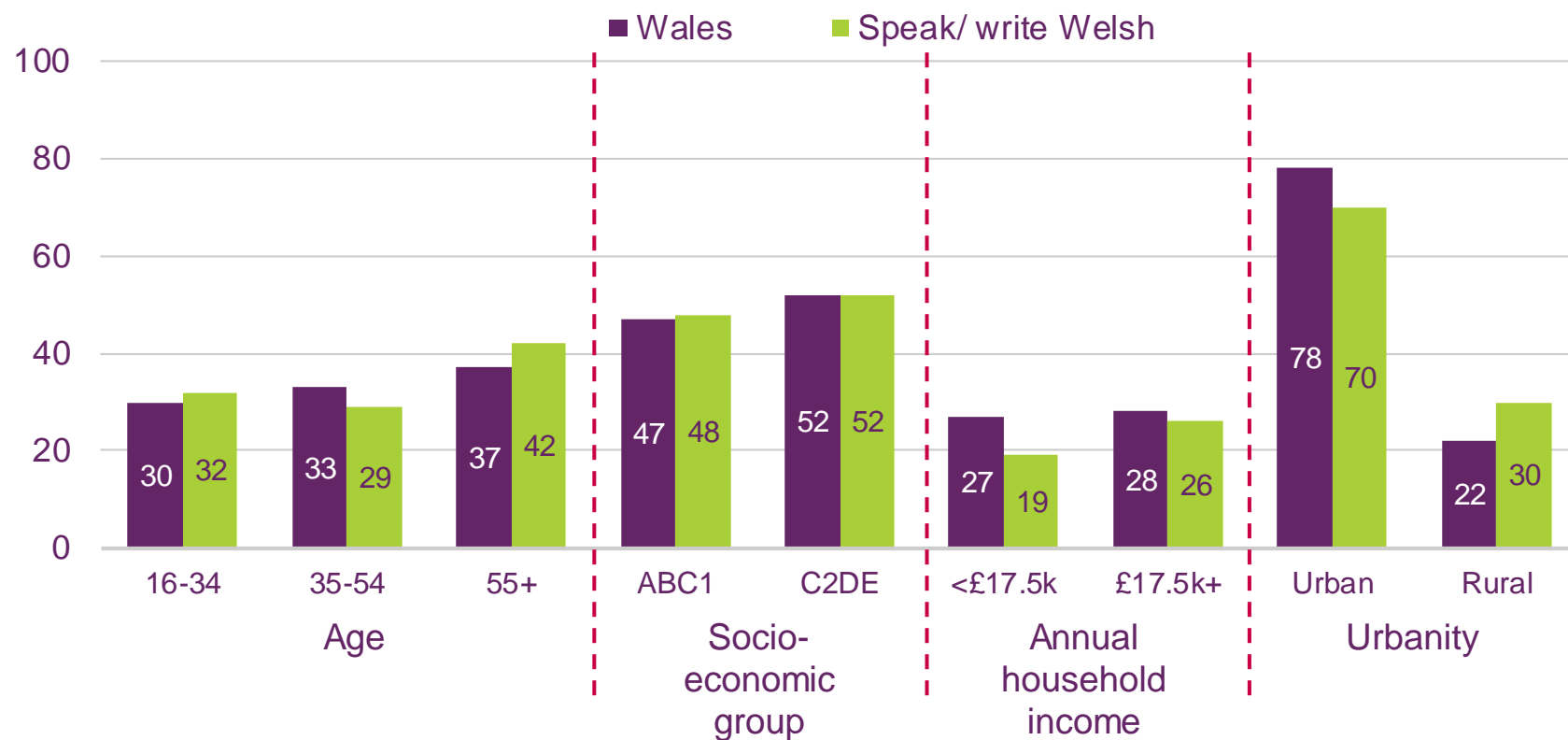
Q: How often, if ever, do people bump into you while walking on the street because they are too busy looking at their phone? Q:

How often, if ever, do you bump into people or anything else while walking on the street because you are too busy looking at your phone?

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

Figure 1.16

Demographic profile of those who can speak or write in 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

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, Half 1 2016

Base: All adults aged 16+: 489 Wales, 135 speak or write Welsh (fluent and non-fluent)

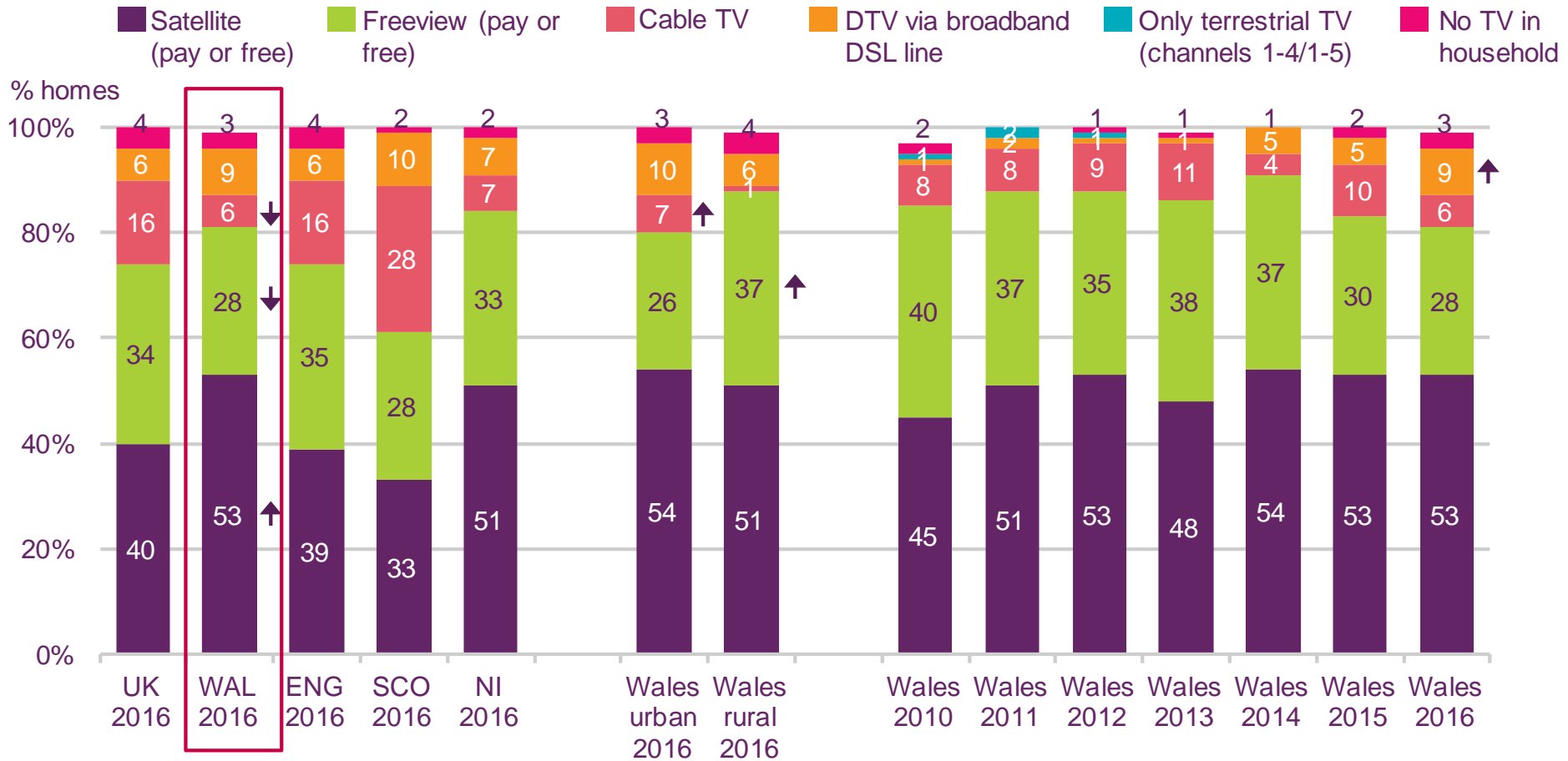
Arrows indicate significant increase/ decrease compared to Wales as a whole at the 95% confidence level.

Note: Mobile internet = using a mobile phone or smartphone for web/data access.

2. TV and audio-visual

Figure 2.1

Main TV set share by platform



Source: Ofcom Technology Tracker, Half 1 2016

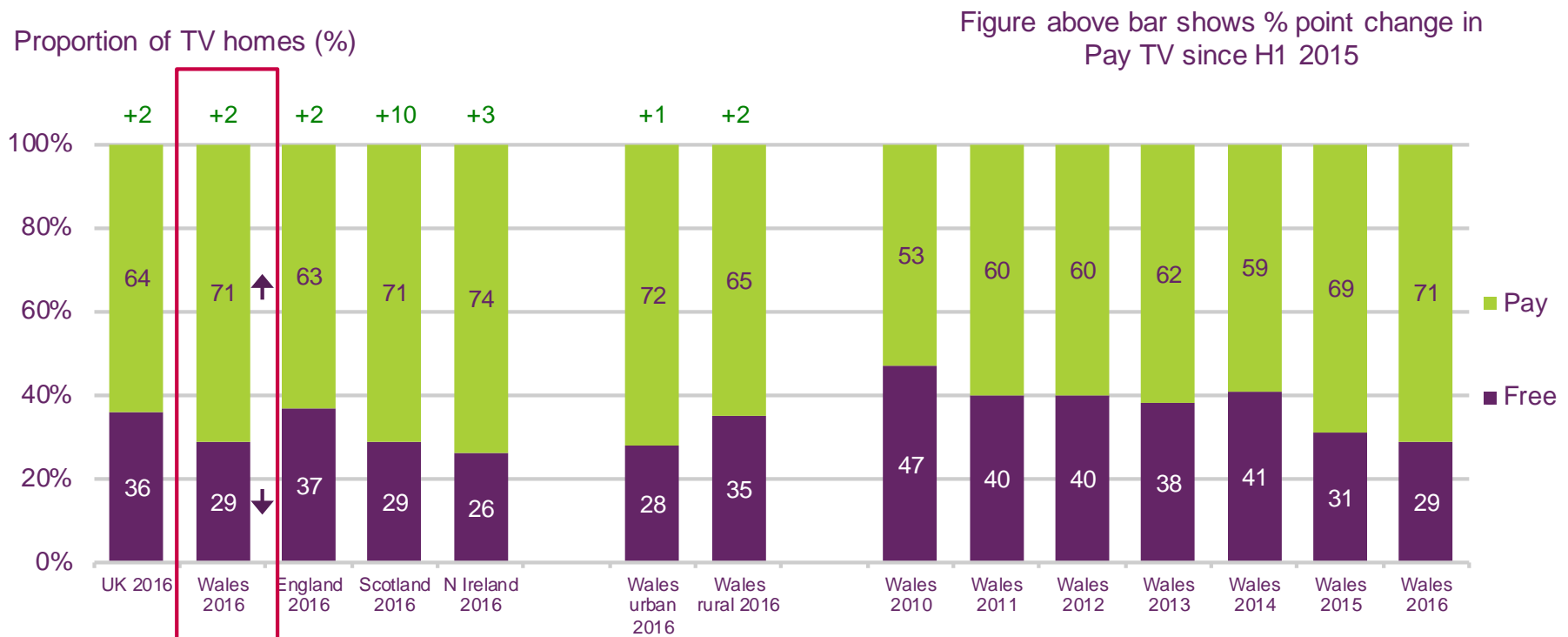
Base: All adults aged 16+ (n = 3737 UK, 489 Wales, 2239 England, 502 Scotland, 507 Northern Ireland, 240 Wales urban, 249 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 489 Wales 2016)

Significance testing: Arrows indicate any significant differences between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016

QH1A: Which, if any, of these types of television does your household use at the moment?

Figure 2.2

Proportion of homes with free and pay television



Source: Ofcom Technology Tracker, Half 1 2016

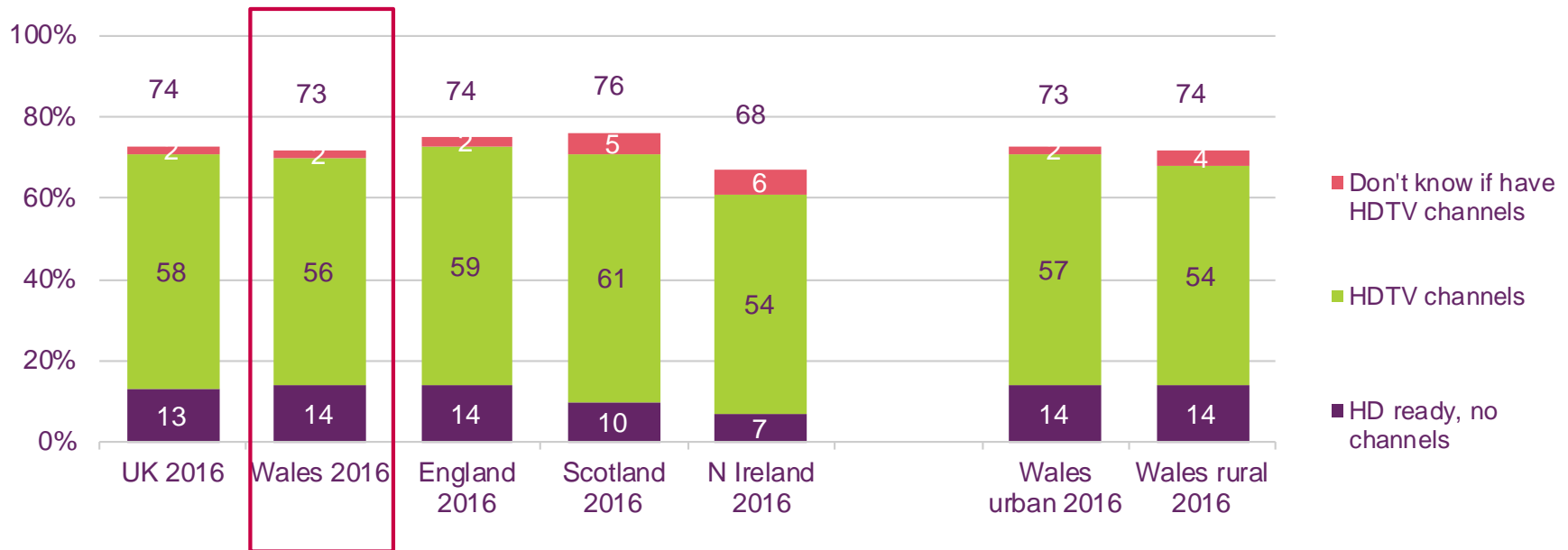
Base: All adults aged 16+ with a TV in household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015, 471 Wales 2016)

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

QH1A: Which, if any, of these types of television does your household use at the moment?

Figure 2.3

Proportion of homes with HD television



Source: Ofcom Technology Tracker, Half 1 2016

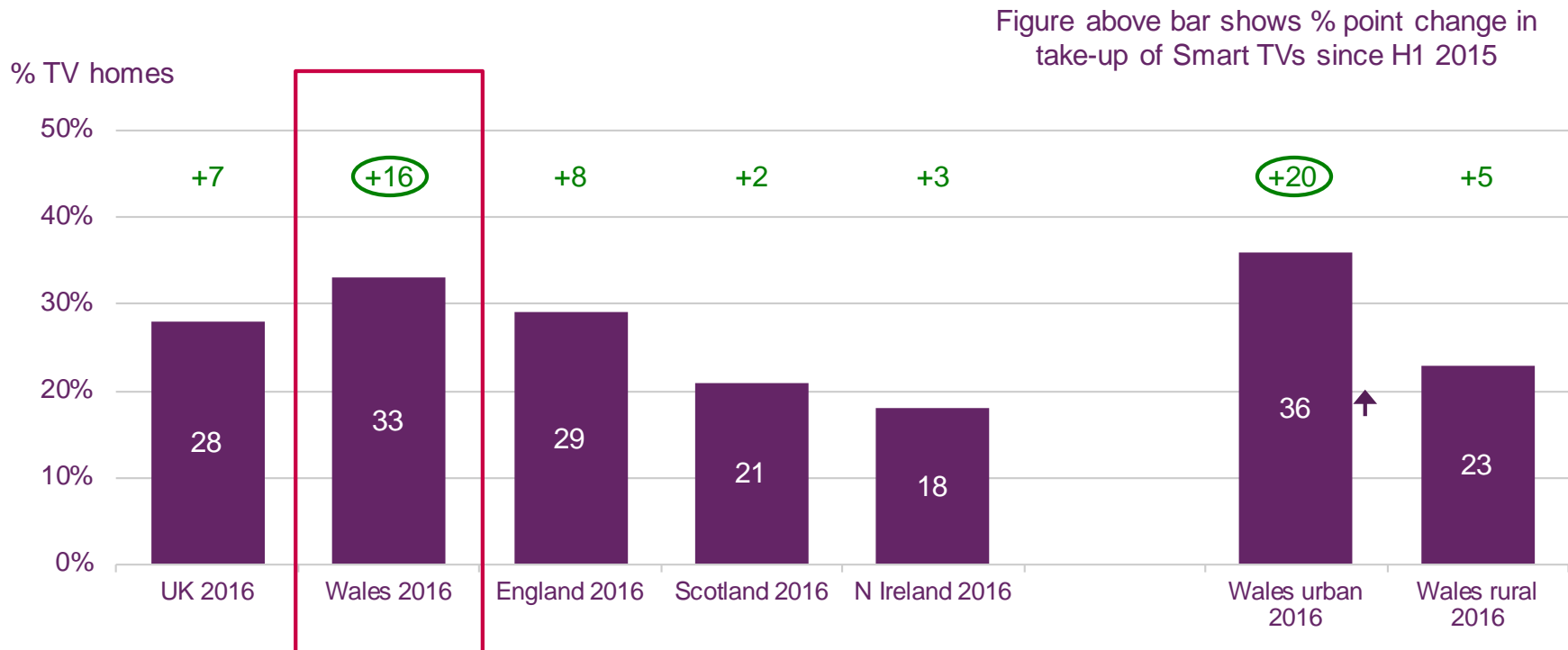
Base: All adults aged 16+ with a TV in the household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural)

Significance testing: Arrows indicate any significant differences between Wales and UK in 2016 and between Wales urban and rural in 2016

QH53: Is the main TV in your household an HDTV set or HD ready?/ QH54: Although you have an HDTV ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set top box or a TV with built-in HDTV receiver. For the main TV set, does your household have an HD TV service?

Figure 2.4

Smart TV take-up in Wales



Source: Ofcom Technology Tracker, Half 1 2016

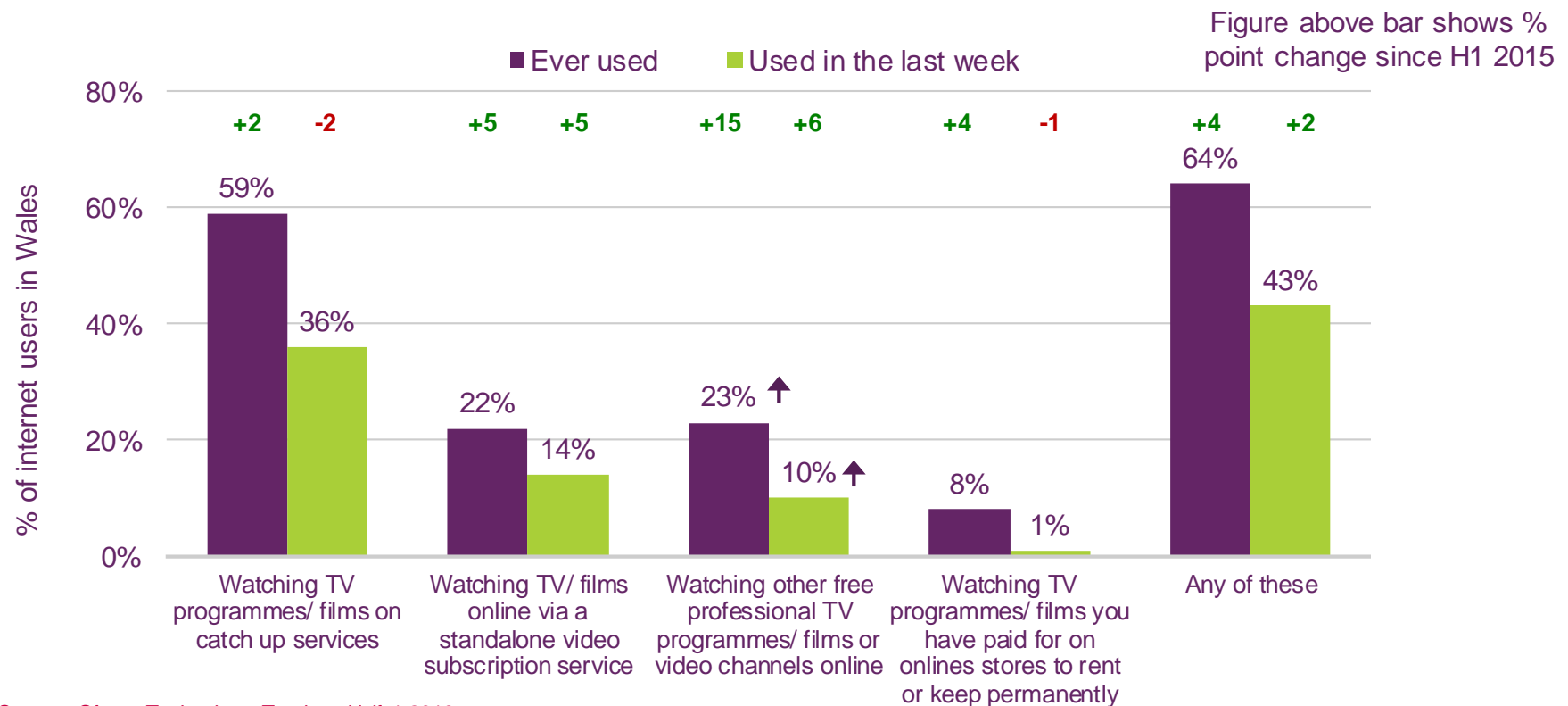
Base: All adults aged 16+ with a TV in household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural)

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

QH62: Are any of your TV sets "Smart TVs"? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

Figure 2.5

TV programmes, films and on-demand on any device



Source: Ofcom Technology Tracker, Half 1 2016

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

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

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? / QH47: And which, if any, of these have you used in the last week?

Figure 2.6

Average minutes of television viewing per day, by nation: 2015

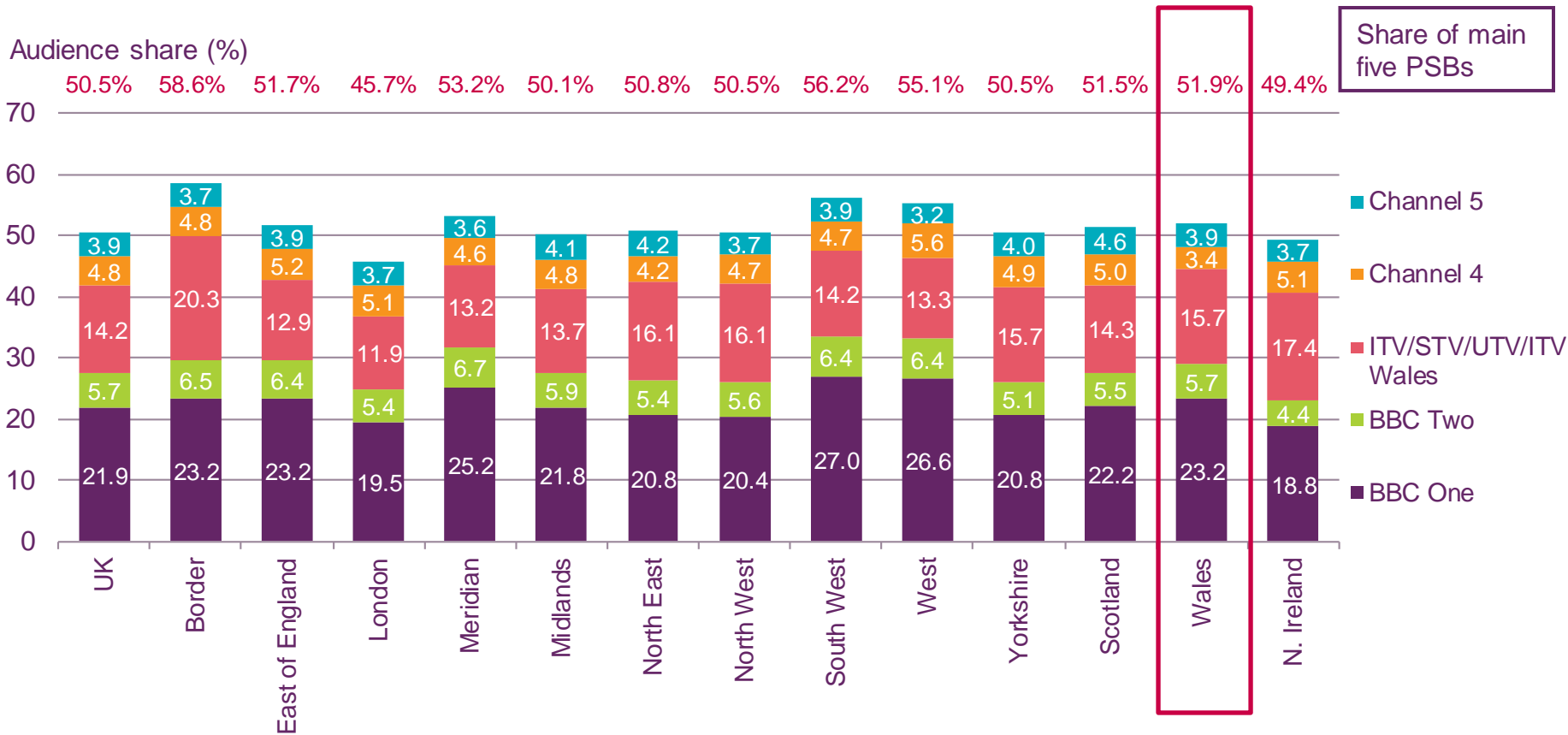


Source: BARB, Individuals (4+). Please see definitions for list of PSB channels

*Note: This figure reflects the average across the English regions with the highest in Border at 243 minutes (4 hours 03 minutes) and lowest in London at 197 minutes (3 hours 17 minutes) respectively.

Figure 2.7

Share of the main five PSB channels in all homes, by UK nations and regions: 2015



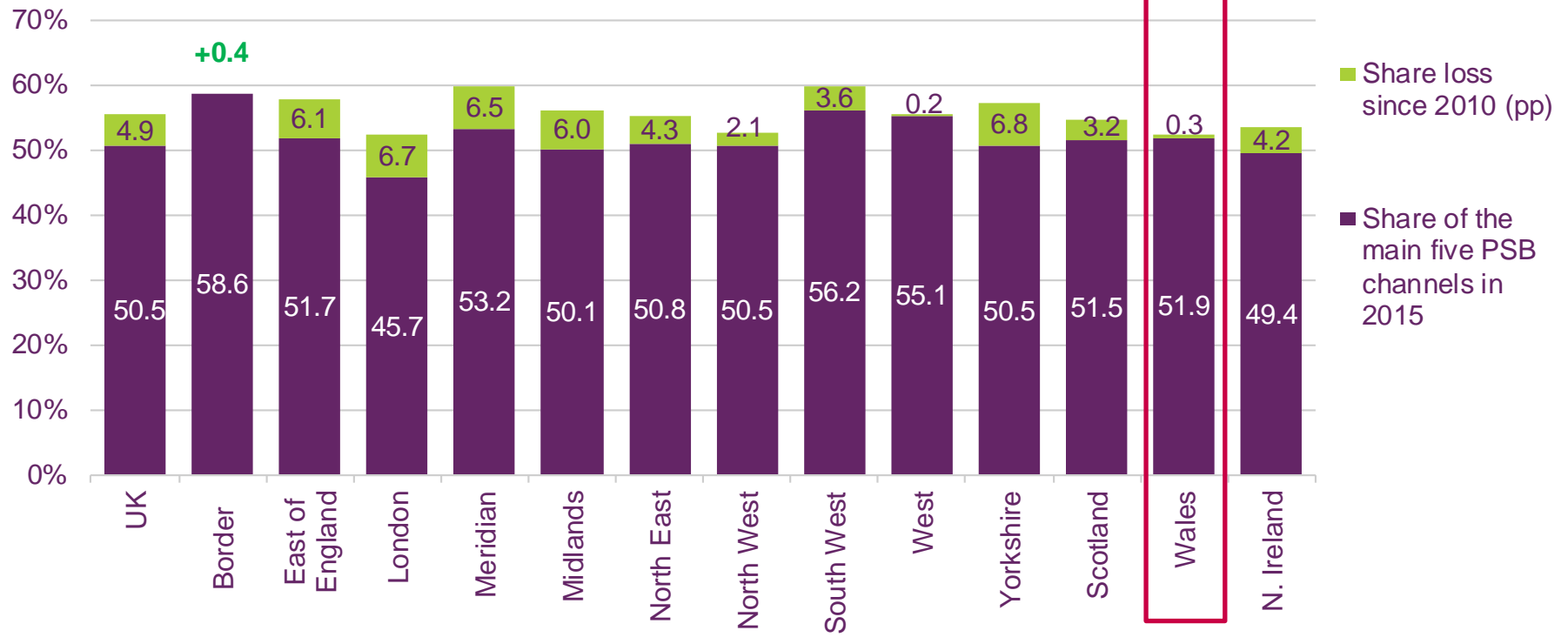
Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.

Figure 2.8

Change in combined share of the main five PSB channels, all homes:
2010 and 2015

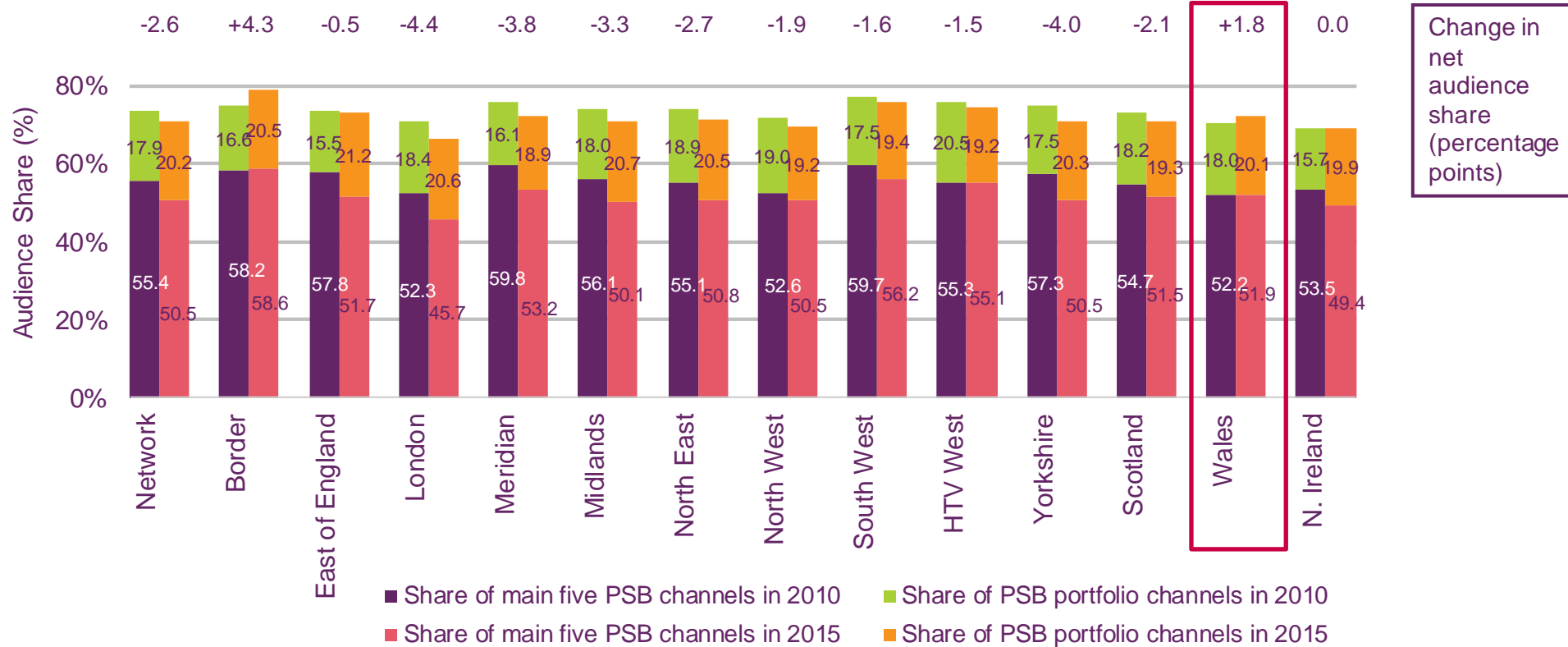
Audience share (%)



Source: BARB, Individuals (4+).

Figure 2.9

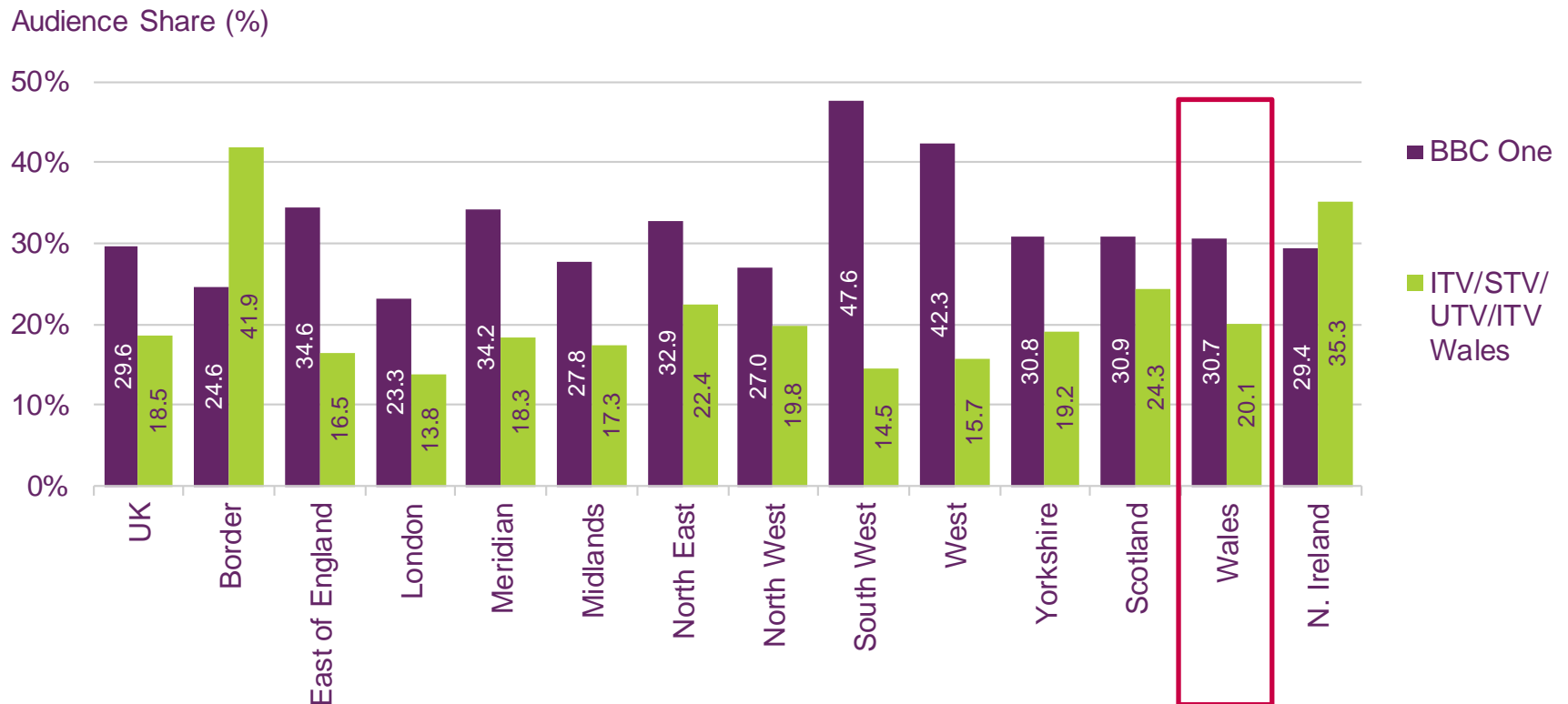
Net change in the audience share of the main five PSB channels and their portfolio channels, all homes: 2010 and 2015



Source: BARB, Individuals 4+.

Figure 2.10

BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares, all homes: 2015



Source: BARB, Individuals (4+).BBC One includes HD variant. ITV excludes HD variants and +1.

Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, BBC One & ITV (exc HD), weekdays. UK figures based on share to respective early evening news bulletin day parts. BBC One's early evening news bulletin is transmitted between 18:30 – 19:00 and ITV/STV/UTV/ITV Wales' is transmitted between 18:00 – 18:30.

Figure 2.11

Respondents' main media source for UK and world news



Source: Ofcom Media Tracker 2015.

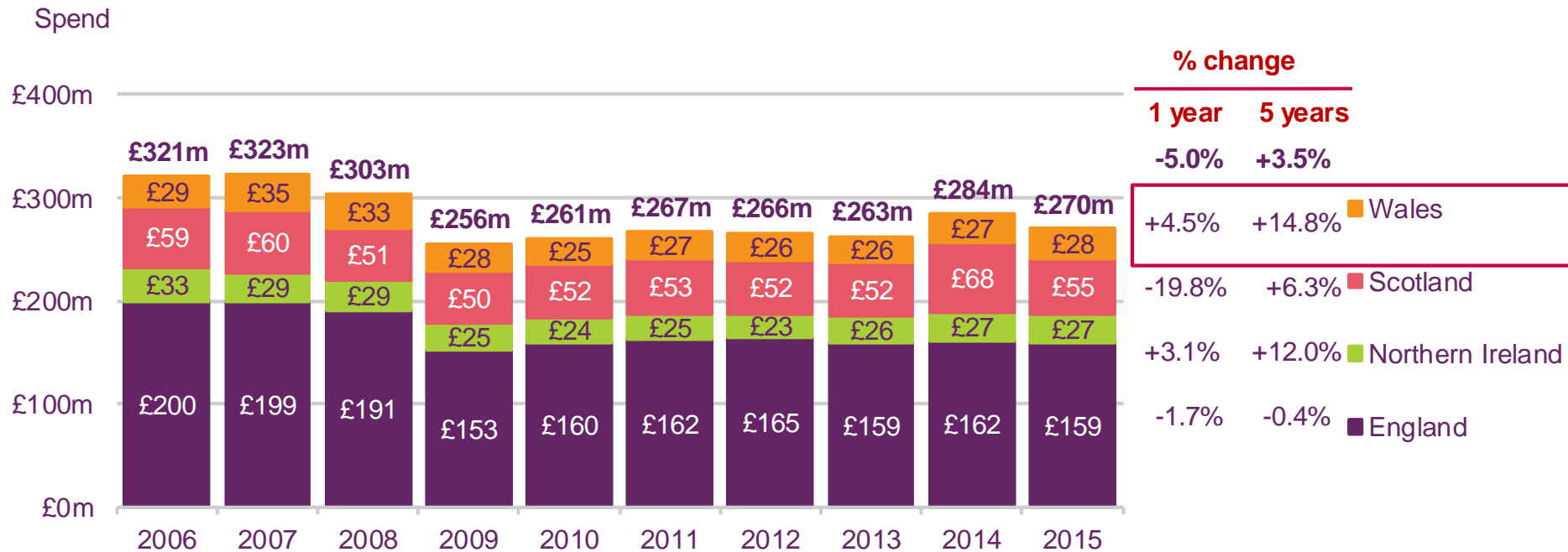
Base: All (2,107); England (1,607); Scotland (180); Wales (164); Northern Ireland (156).

Q62 - Can you tell me which one of these is your 'main' source of news about what is going on in the UK and in the world today?

Significance testing – arrows show any difference in the main source of news between any nation and all adults in 2015

Figure 2.12

Spend on first-run originated nations' and regions' output by the BBC/ITV1/STV/UTV



Source: Broadcasters. All figures are nominal.

Note: Spend data for first-run originations only. Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. Spend on content broadcast in the Scottish part of the ITV Border region is included within England from 2006-2013, but in Scotland thereafter. These figures do not include spend on network content. For more information on S4C, please see Section 1.5.

Figure 2.13

Change in total spend on nations and regions output, by genre and nation: 2010-2015

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current affairs	-10%	-1%	-1%	-28%	11%	68%	-19%	34%	-7%	11%
News	0%	2%	-1%	-1%	4%	17%	1%	16%	-3%	0%
Non-news/non-current affairs	-14%	1%	0%	-25%	1%	-4%	-28%	-4%	14%	28%
Total spend in 2015	£271m		£159m		£27m		£56m		£29m	

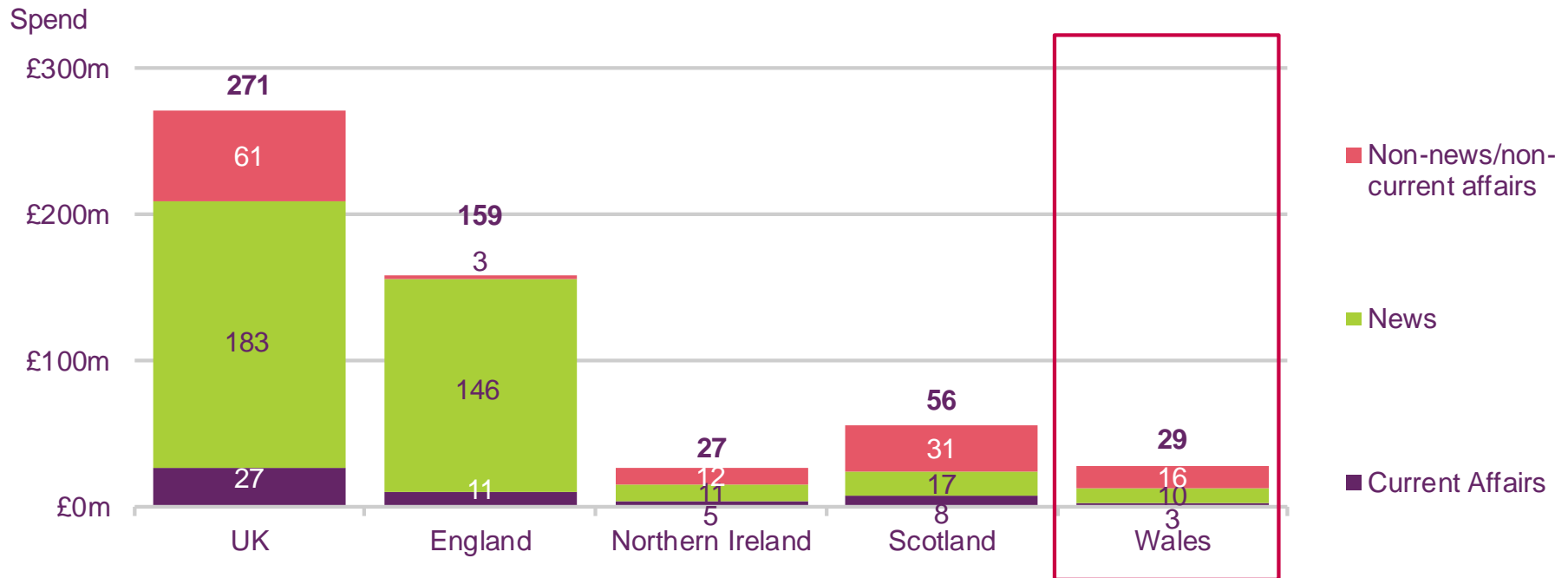
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in spend	-5%	1%	-2%	-4%	3%	12%	-20%	6%	5%	15%

Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is divided between England and Scotland in 2014-2015 and attributed to England only before 2014.

Figure 2.14

Total spend by the BBC/ ITV/ STV/ UTV on non-network nations/regions output for the main PSB channels: 2015

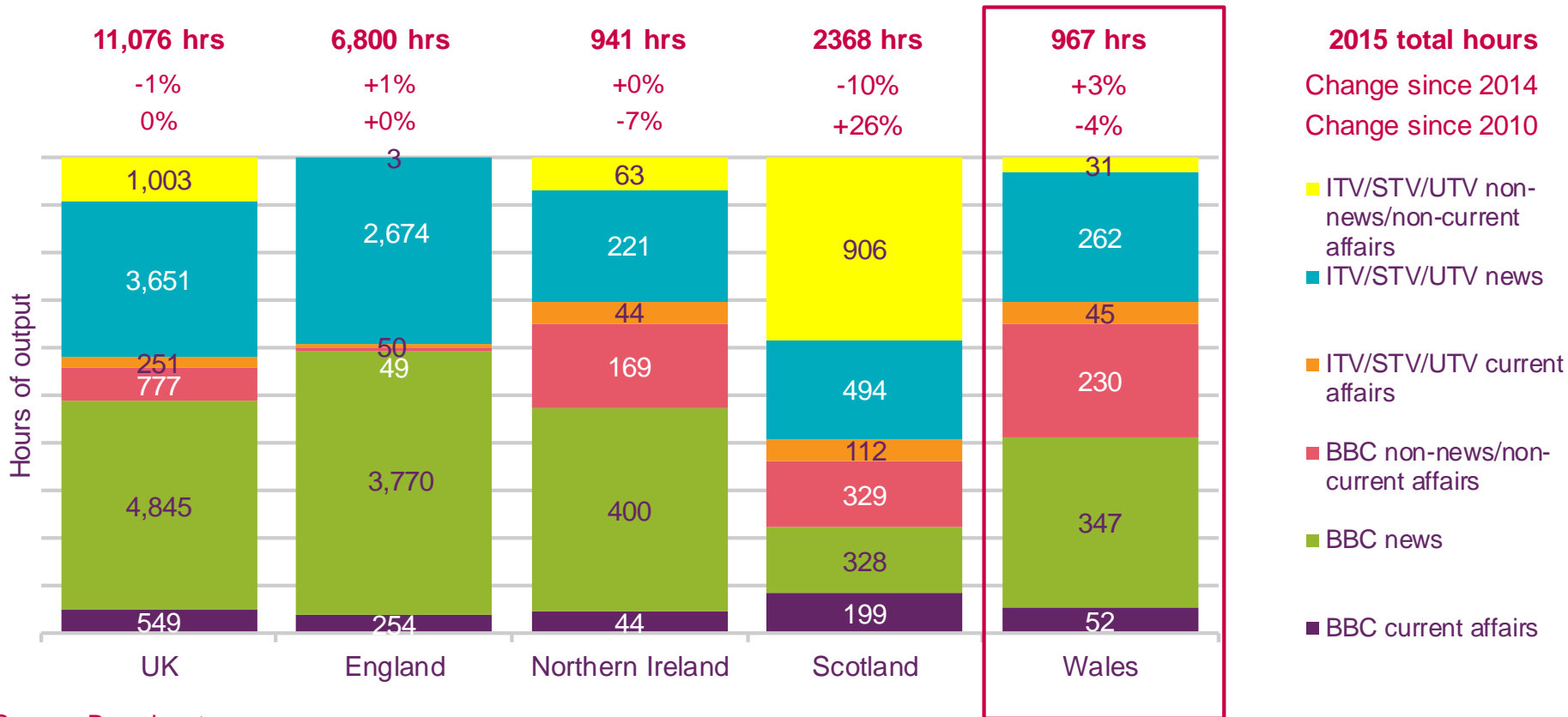


Source: Broadcasters.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

Figure 2.15

First-run originated hours of nations/regions output, by genre and broadcaster: 2015



Source: Broadcasters.

Note: Hours data for first-run originations only. Excludes hours for BBC Alba and S4C output but includes some hours of Irish language programming by the BBC. These figures do not include hours of network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015

Figure 2.16

Cost per hour for total nations' and regions' output, by nation: 2010-2015

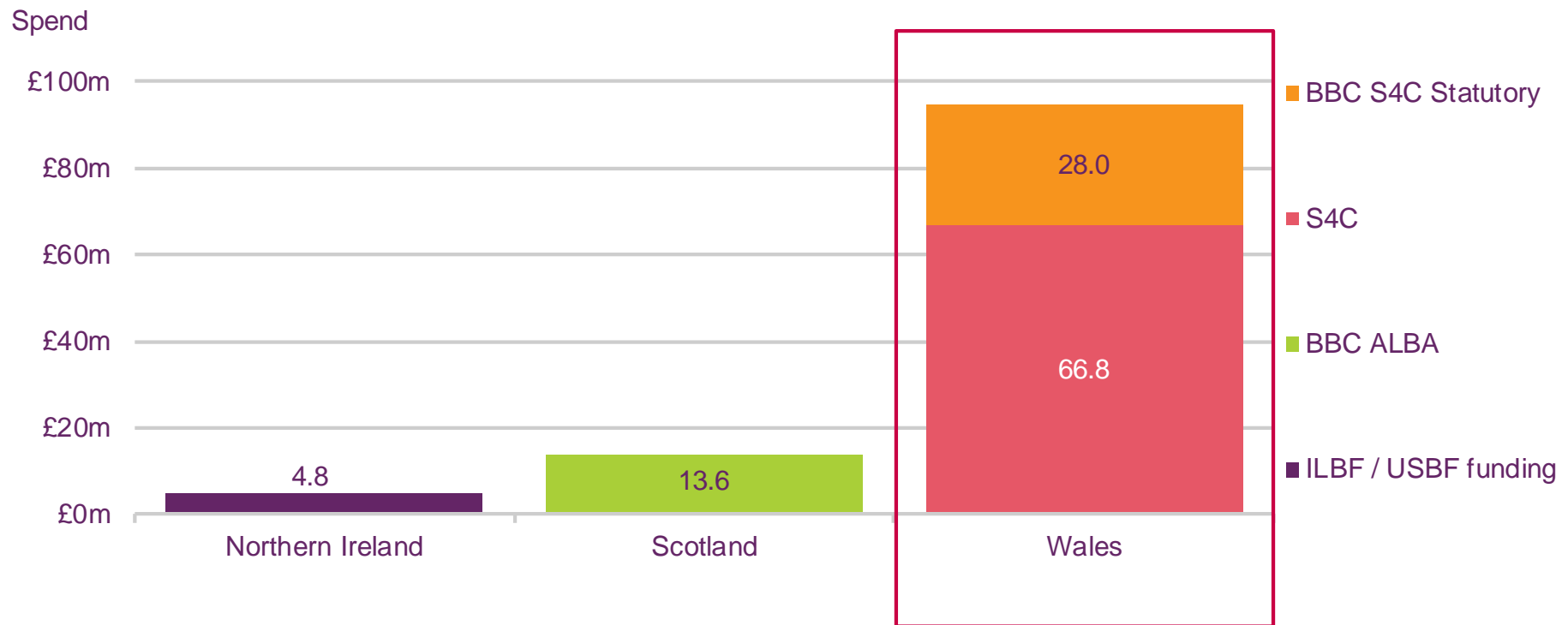


Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015

Figure 2.17

Other spend on other programming in the devolved nations: 2015



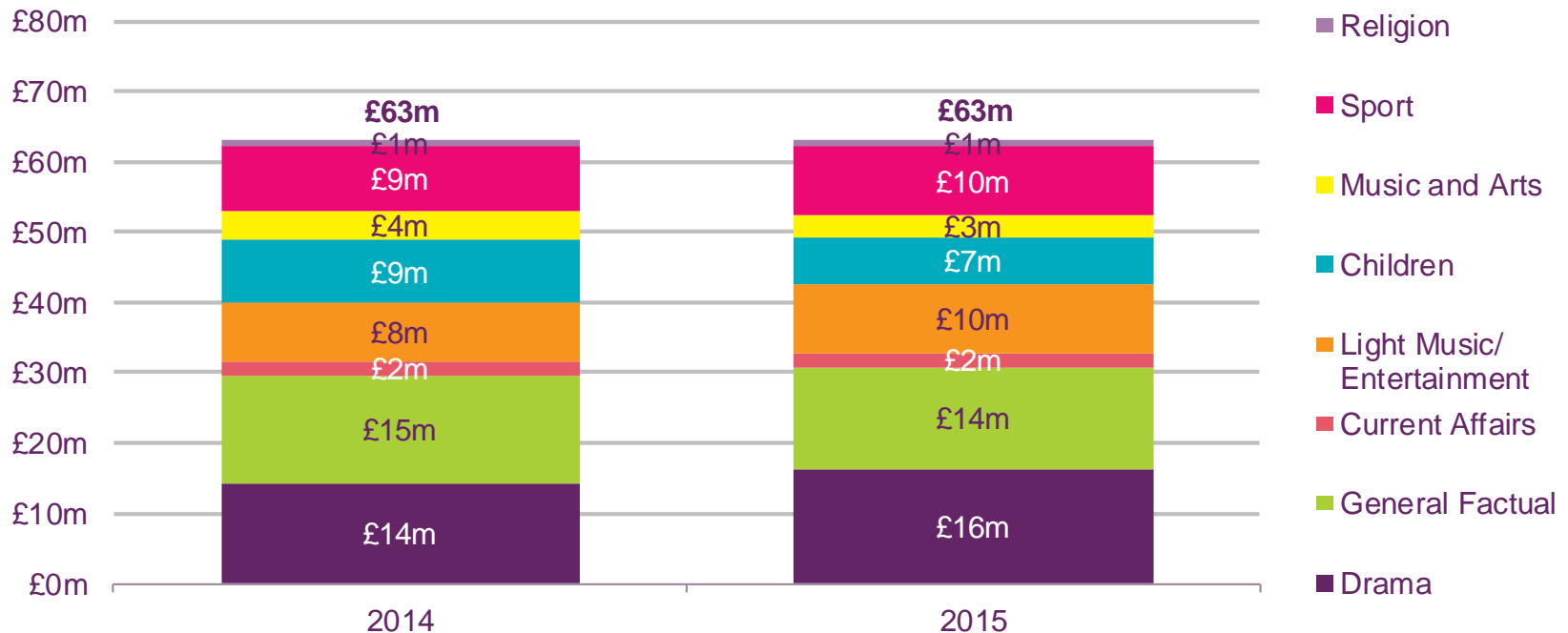
Source: Broadcasters.

Note: BBC S4C Statutory refers to the cost to the BBC of programming supplied to S4C by the BBC as part of their statutory agreement. ILBF / USBF refers to additional production contributions by the Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund. S4C figures cover the 2014/2015 financial year, BBC ALBA and ILBF / USBF figures cover the 2014 calendar year.

Figure 2.18

Spend by S4C on first-run Welsh language programming 2015

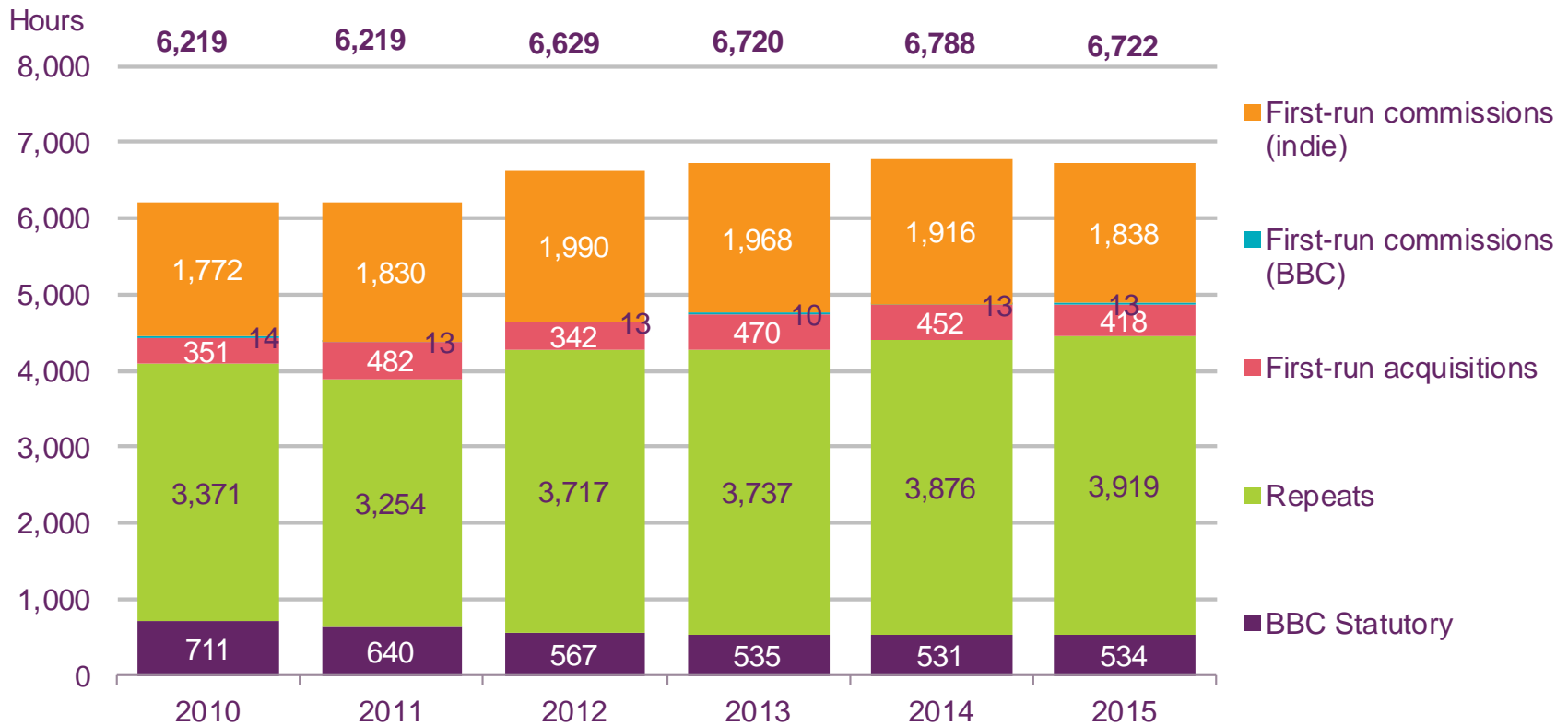
Spend on Welsh language programming



Source: S4C. All figures are expressed in nominal terms. Note: Does not include programming provided by the BBC under the statutory obligation.

Figure 2.19

Type of Welsh-language output on S4C, by hours

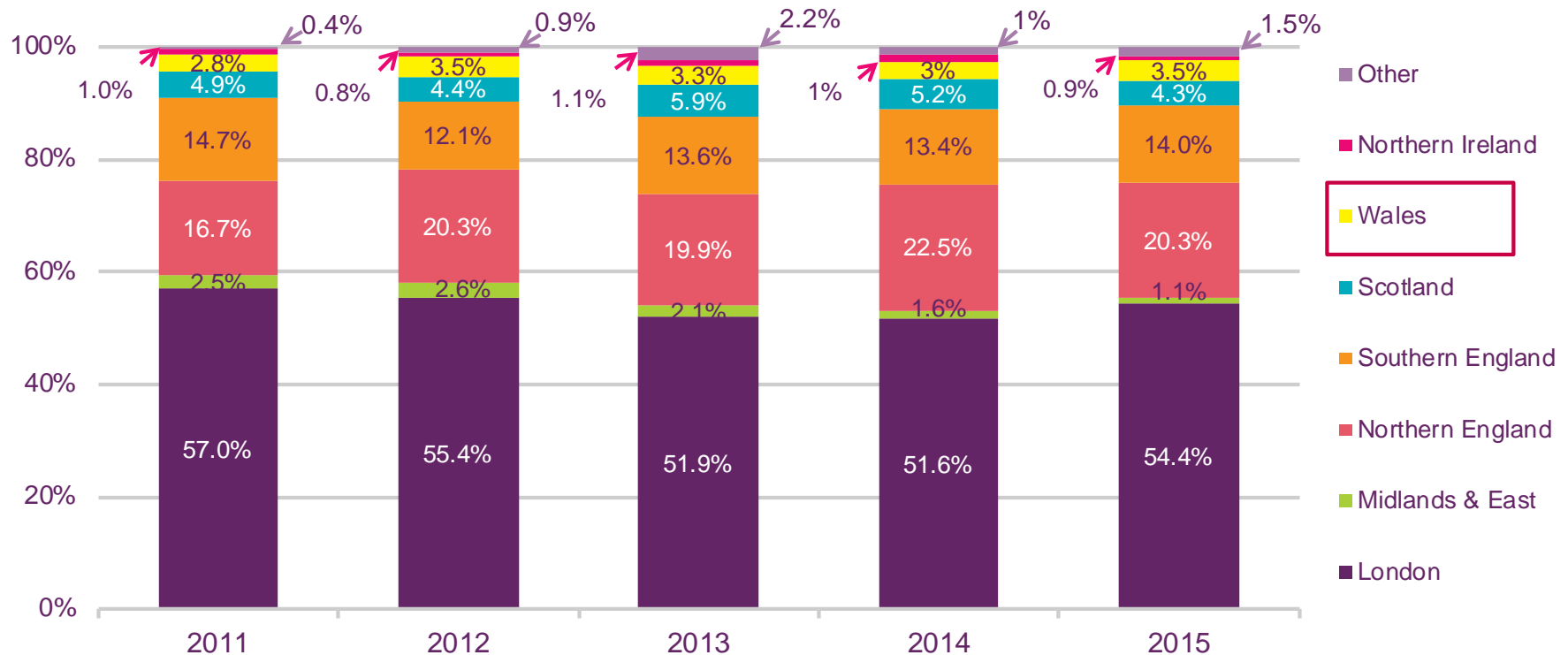


Source: S4C.

Figure 2.20

Expenditure on originated network productions: 2011-2015

Percentage of production by value



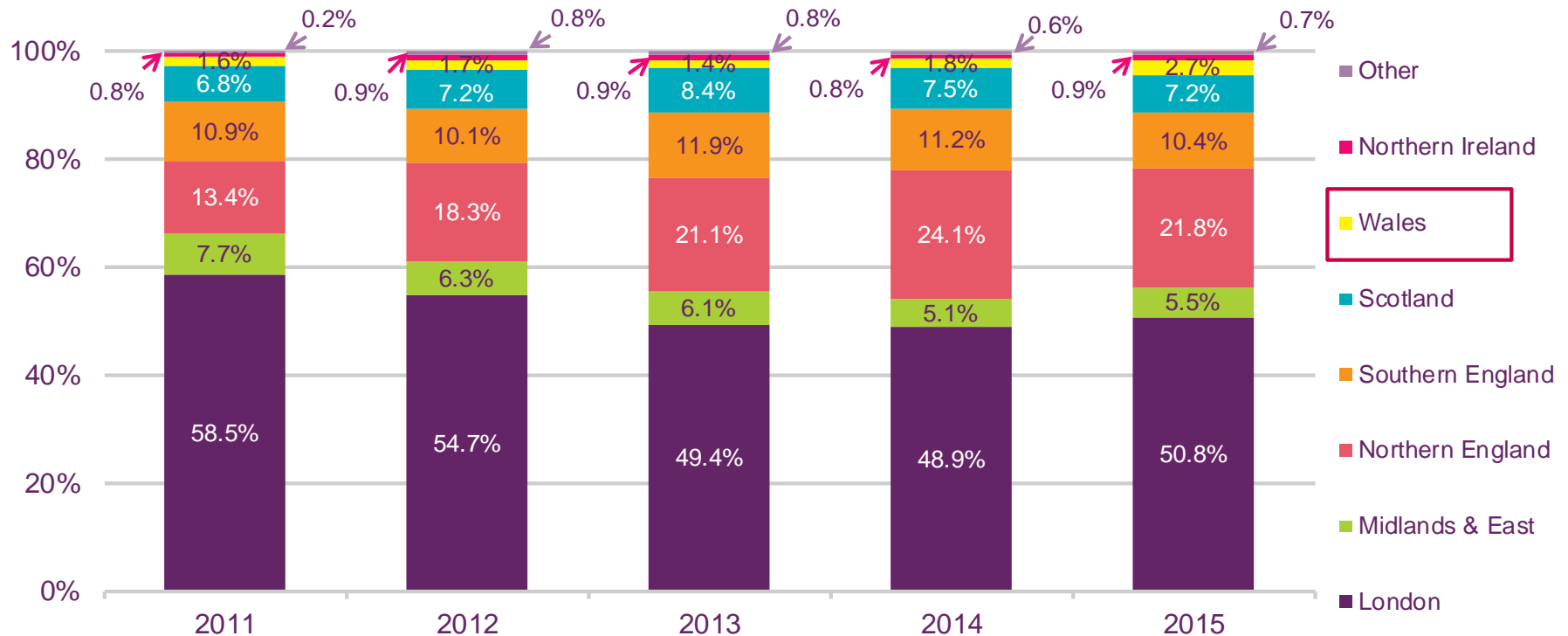
Source: Ofcom/broadcasters

Note: This expenditure does not include network news production. The category 'other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

Figure 2.21

Volume of originated network productions: 2011-2015

Percentage of production by volume



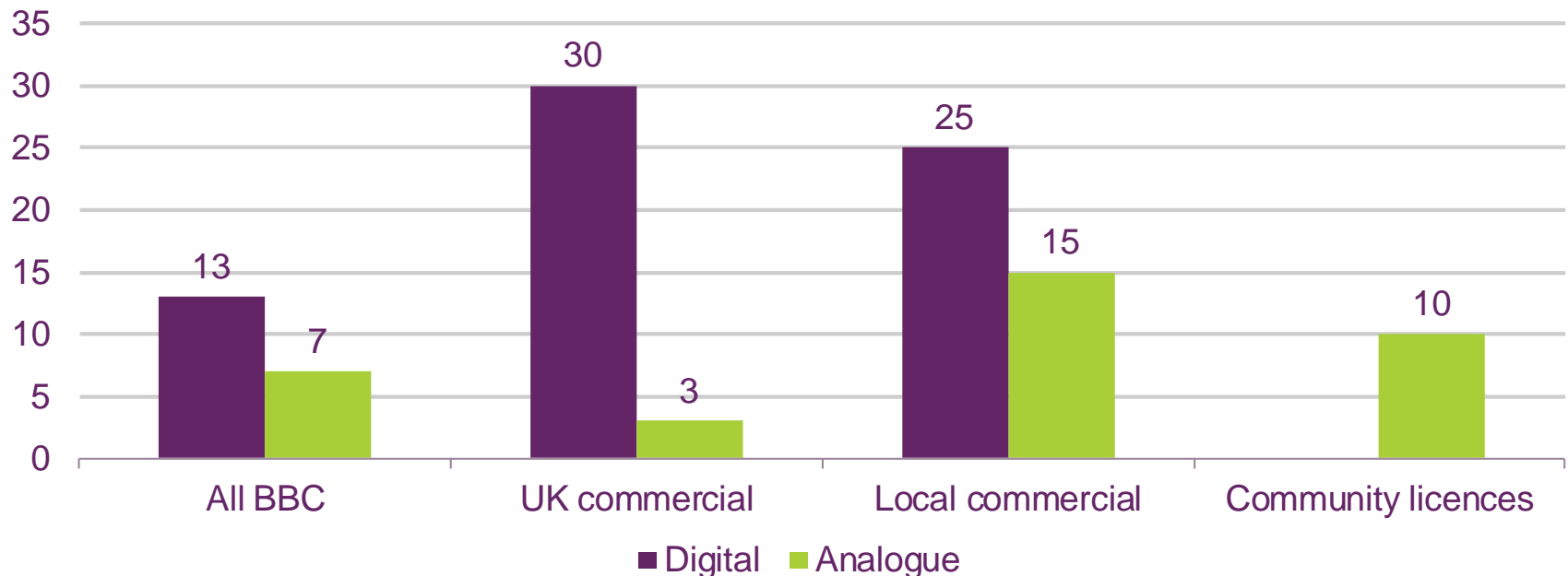
Source: Ofcom/broadcasters

Note: These hours do not include network news production . The category 'other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

3. Radio and audio

Figure 3.1

Radio station availability



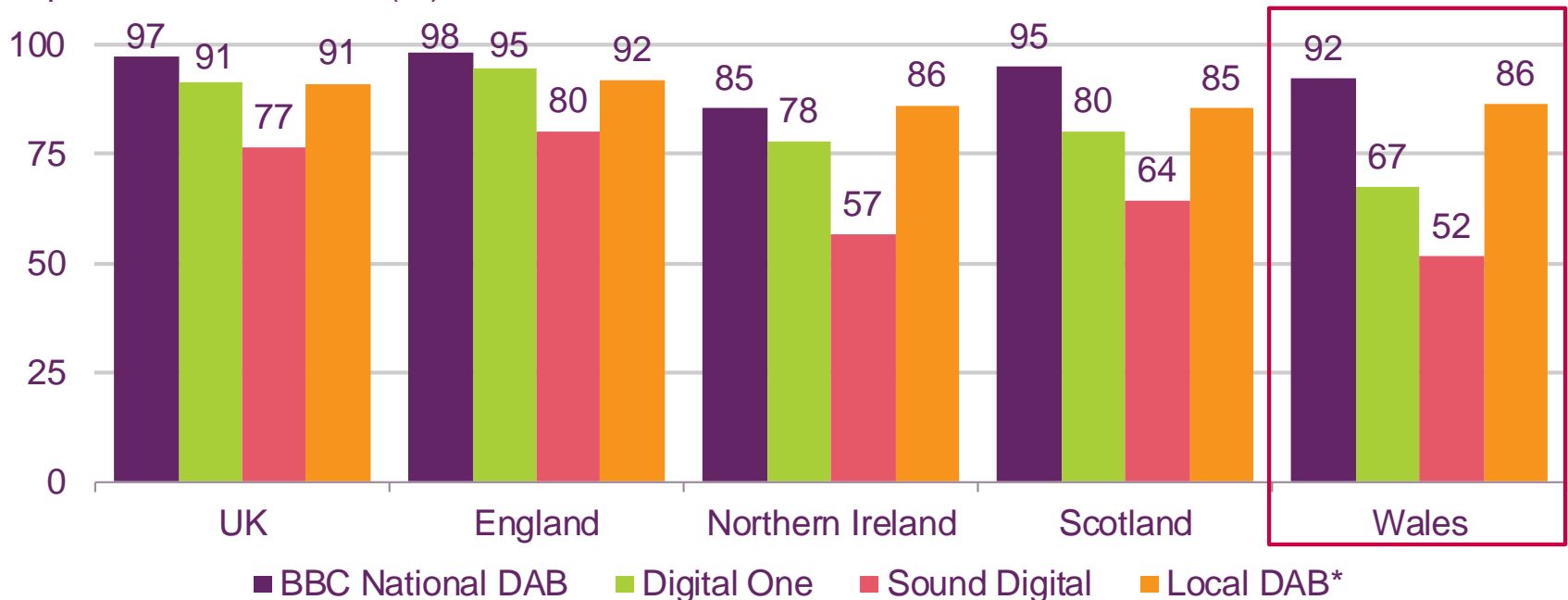
Source: Ofcom, May 2016

Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them.

Figure 3.2

Household coverage of DAB

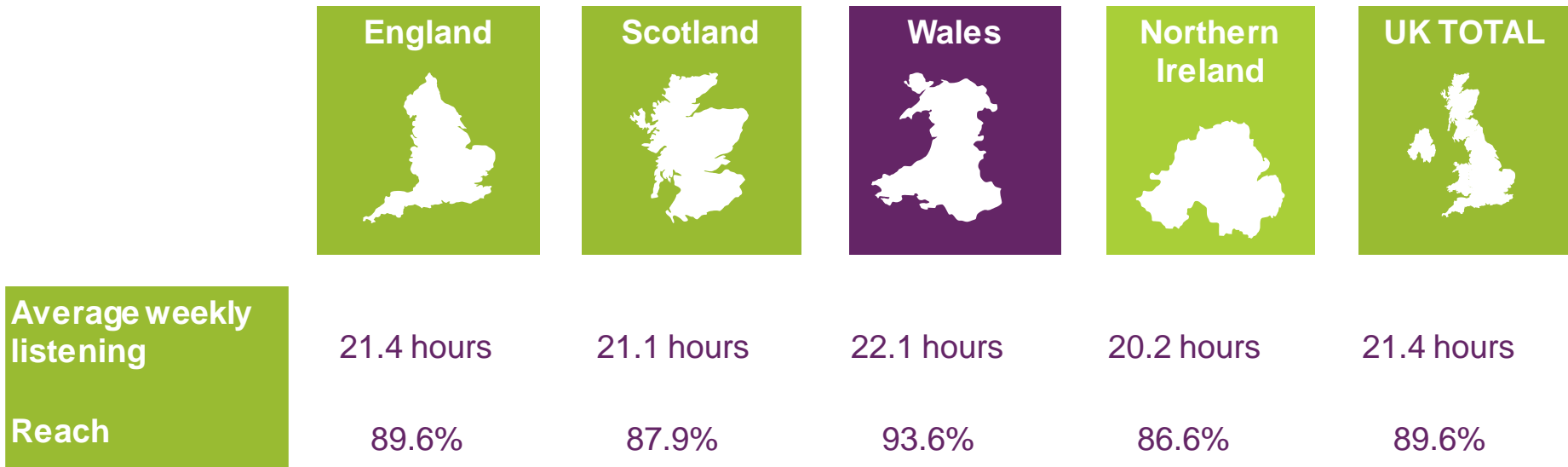
Proportion of households (%)



Source: BBC, Arqiva, Ofcom, May 2016. 'Figures for local DAB are projections of expected coverage for Autumn 2016 based upon a planned list of transmitter sites. The plan is continuing to be refined and actual coverage may differ slightly from those figures when the current programme of expansion completes.'

Figure 3.3

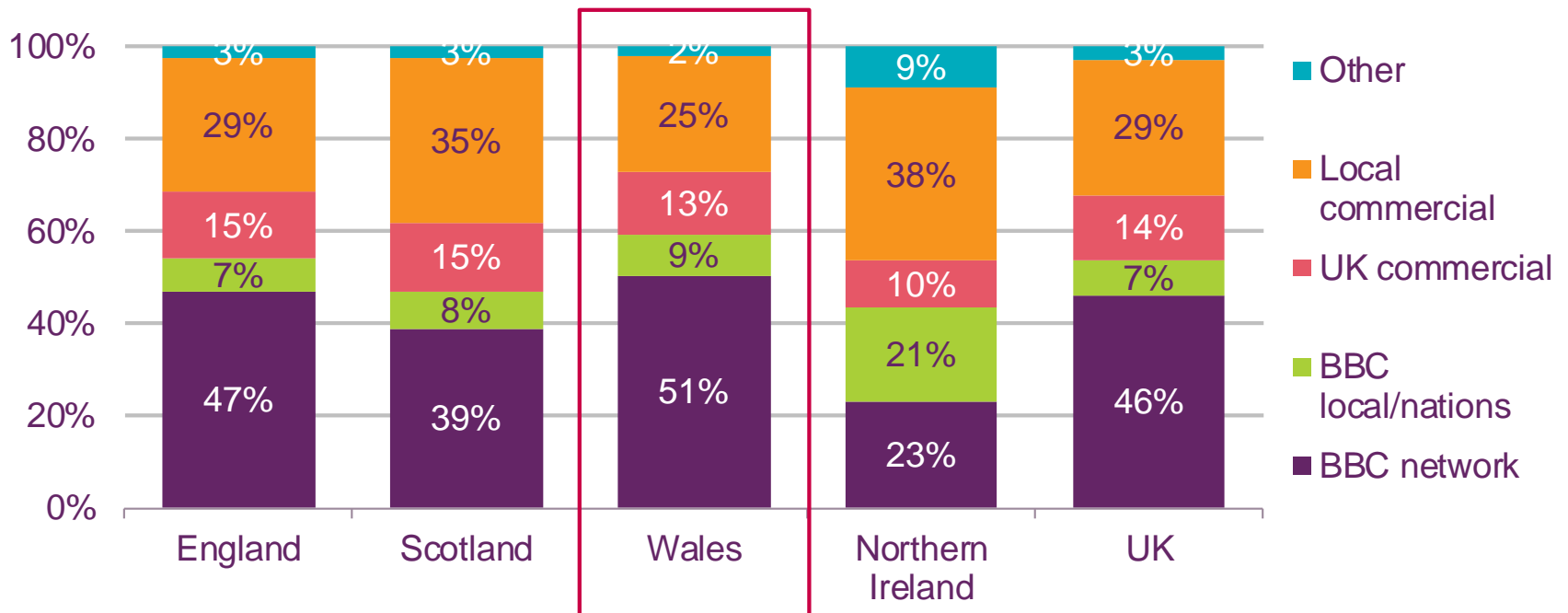
Average weekly reach and listening hours: 2015



Source: RAJAR, All adults (15+), year ended Q4 2015. Reach is defined as a percentage of the area adult population who listen to a station for at least 5 minutes in the course of an average week.

Figure 3.4

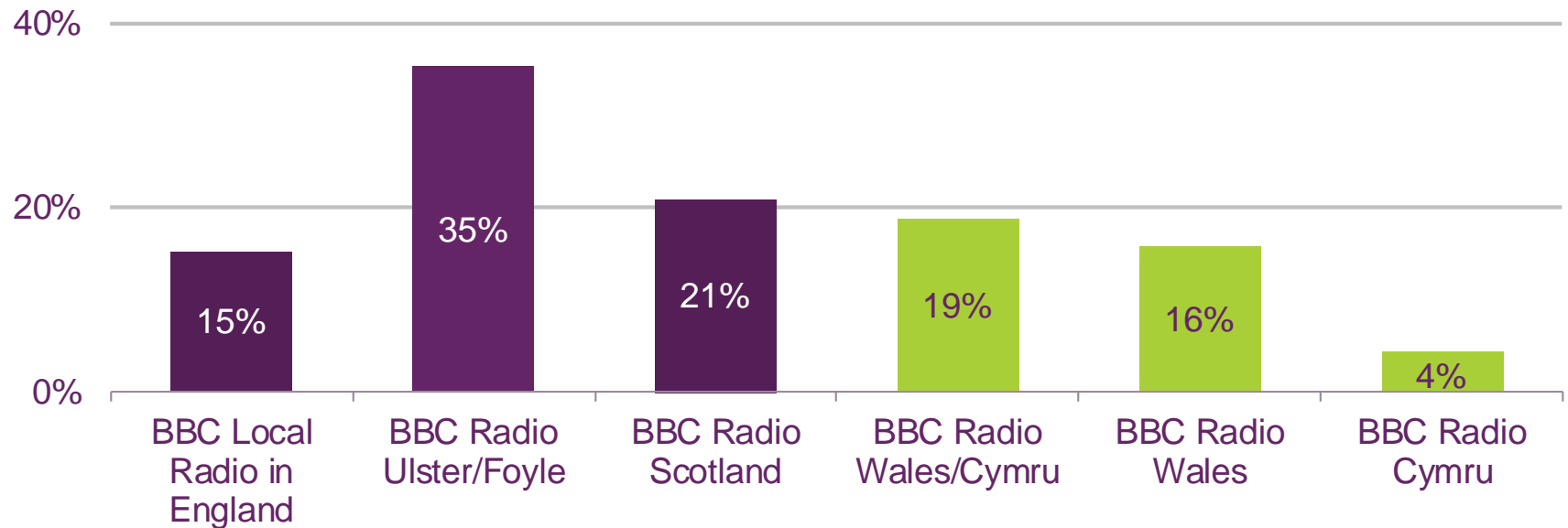
Share of listening hours by nation: 2015



Source: RAJAR, All adults (15+), year ended Q4 2015

Figure 3.5

Weekly reach for nations'/local BBC services: 2015

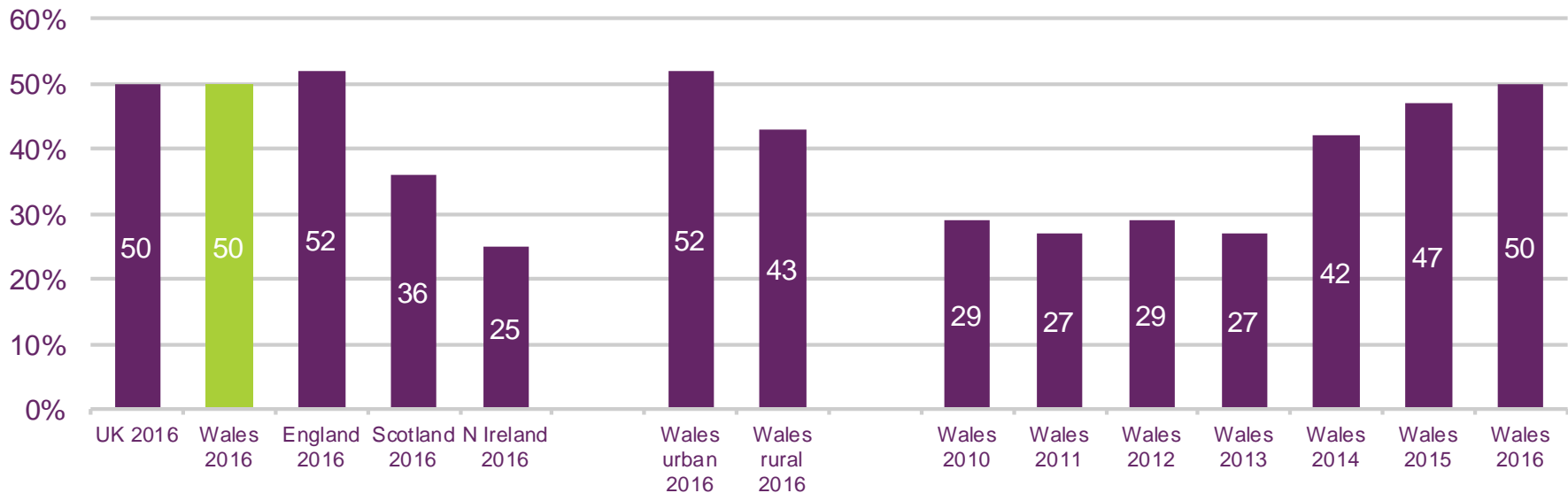


Source: RAJAR, All adults (15+), year ended Q4 2015

Figure 3.6

Ownership of DAB digital radios

Percentage of respondents



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ w ho listen to radio (n = 2832 UK, 399 Wales, 1693 England, 384 Scotland, 356 Northern Ireland, 192 Wales urban, 207 Wales rural, 854 Wales 2010, 397 Wales 2011, 405 Wales 2012, 383 Wales 2013, 403 Wales 2014, 406 Wales 2015, 399 Wales 2016)

NB. Data in 2011 based on those w ho listen to radio and have any radio sets in the household that someone listens to in most weeks

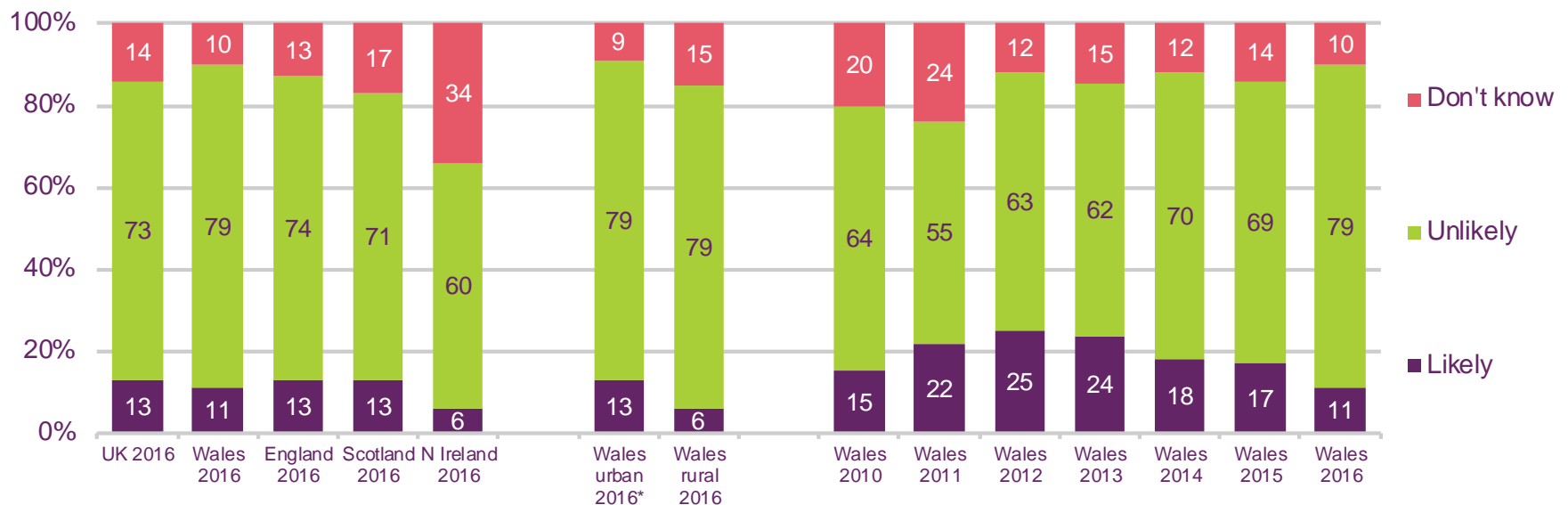
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for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

QP9: How many DAB sets do you have in your household?

Figure 3.7

Likelihood of purchasing a DAB radio within the next year

Percentage of respondents



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1593 UK, 212 Wales, 870 England, 236 Scotland, 275 Northern Ireland, 94 Wales urban, 118 Wales rural, 594 Wales 2010, 207 Wales 2011, 273 Wales 2012, 269 Wales 2013, 246 Wales 2014, 228 Wales 2015, 212 Wales 2016). *Caution: Low base. Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Wales, urban and rural.

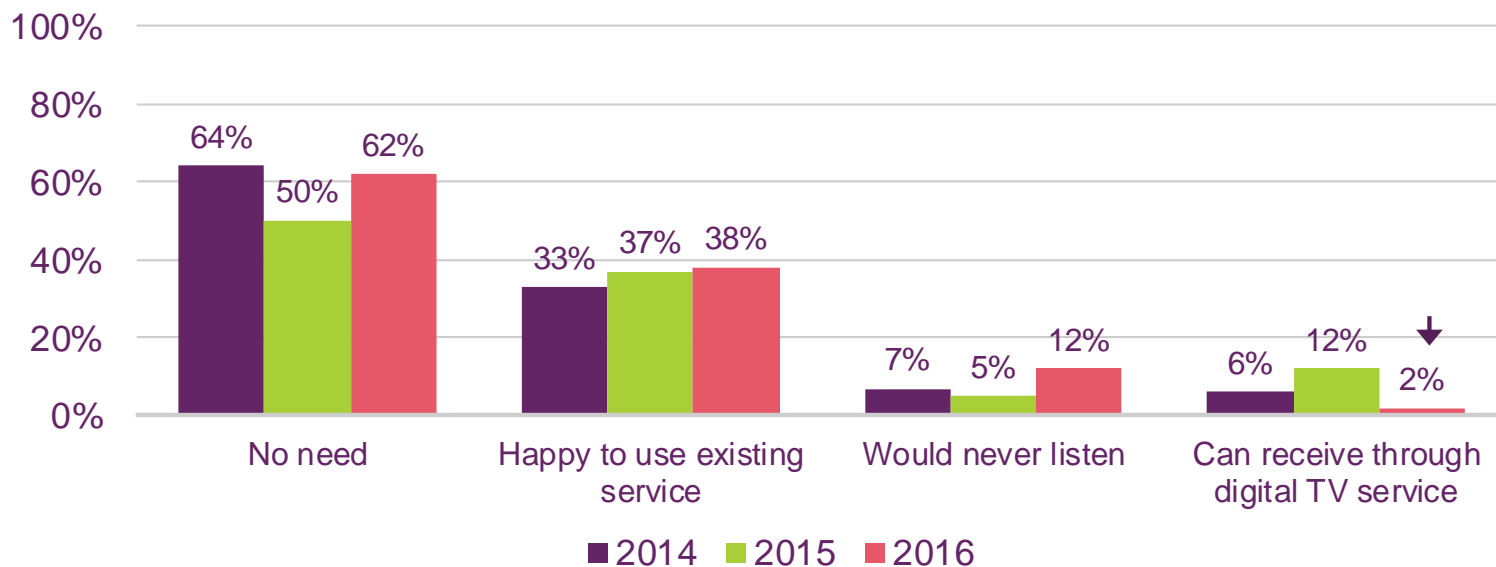
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

NB. Data in 2011 based on those who listen to radio, do not have a DAB set and have any radio sets in the household that someone listens to in most weeks.

Figure 3.8

Reasons why unlikely to purchase DAB in next year

Percentage of respondents



Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ who listen to radio and are unlikely to get DAB radio in the next 12 months (Wales 2014 = 182; Wales 2015 = 166; Wales 2016 = 167)

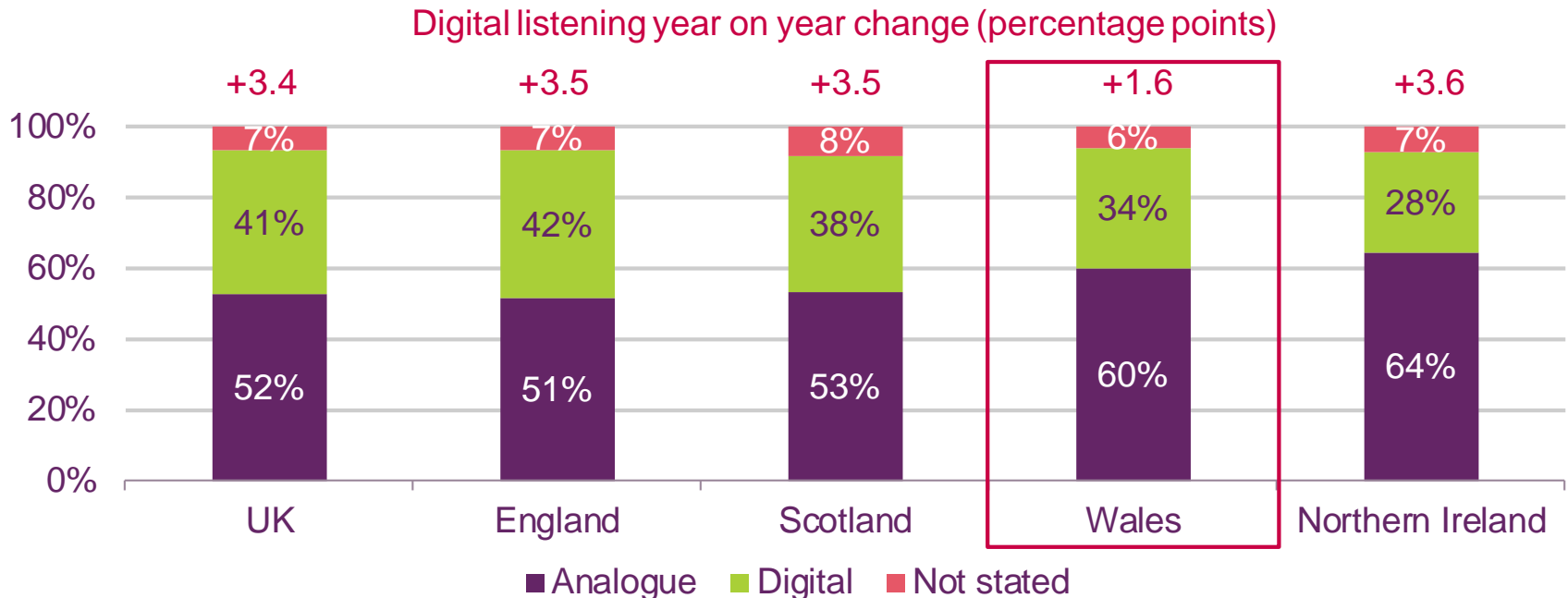
Responses shown for spontaneous mentions by 5% or more at a UK level

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

QJ14: Why are you unlikely to get digital radio in the next 12 months?

Figure 3.9

Share of listening hours via digital and analogue platforms: 2015

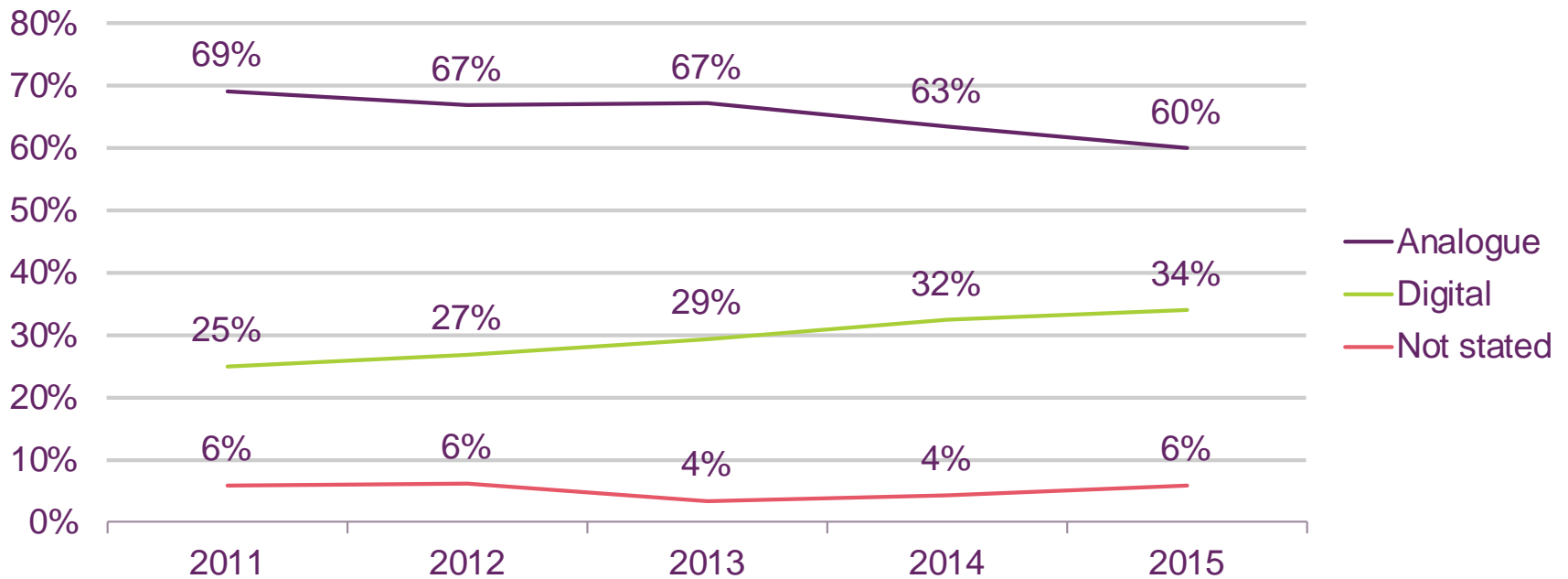


Source: RAJAR, All adults (15+), year ended Q4 2015

Figure 3.10

Share of listening hours via digital and analogue platforms in Wales: 2011-2015

Share of total listening hours

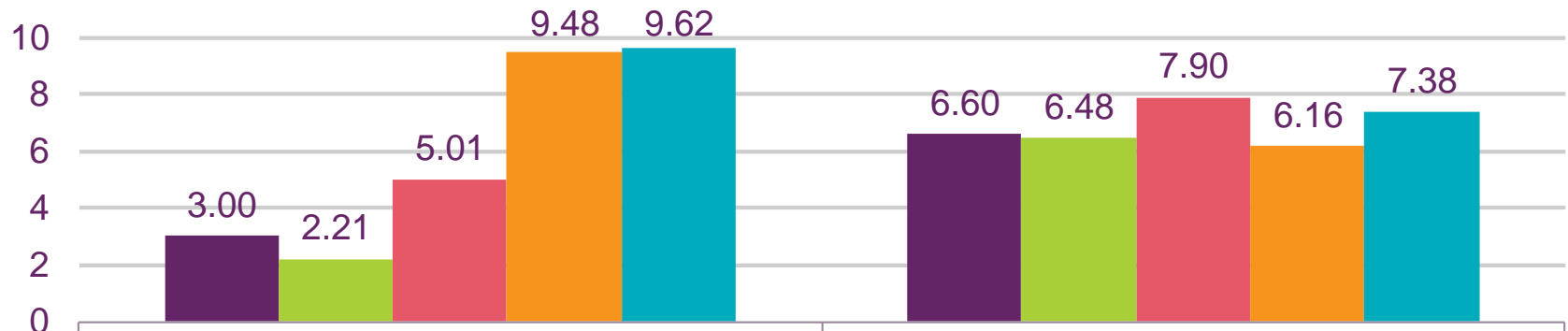


Source: RAJAR, all adults, calendar years 2011-2015

Figure 3.11

Local/nations' radio spend and revenue per head of population: 2015

Revenue / spend per head (£)



Annual change (£):

BBC local/nations content spend 2015-16
 +0.13 +0.08 +0.26 +0.78 +0.22

Local commercial radio revenue 2015
 +0.15 +0.10 -0.12 +1.32 +0.25

- UK nations average
- England
- Scotland
- Wales
- Northern Ireland

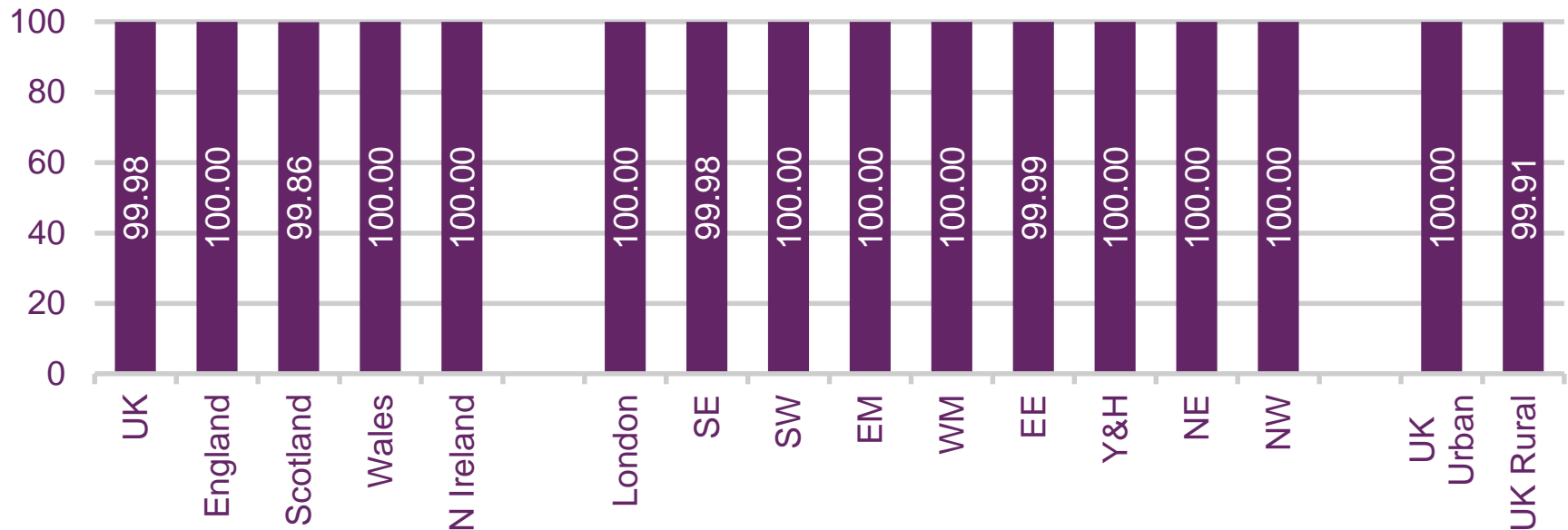
Source: Broadcasters

4. Telecoms and networks

Availability of fixed broadband services

Proportion of premises connected to an ADSL-enabled BT exchange

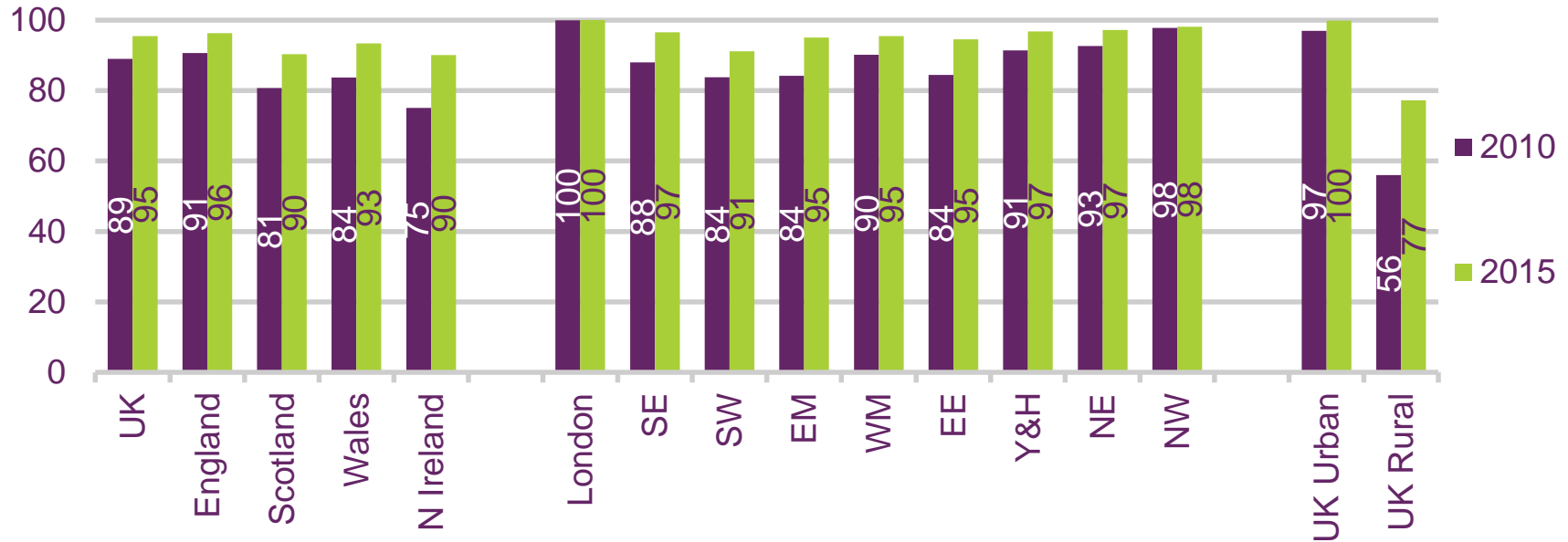
Proportion of premises (per cent)



Source: Ofcom / BT, December 2015 data

Proportion of premises in connected to an unbundled local exchange

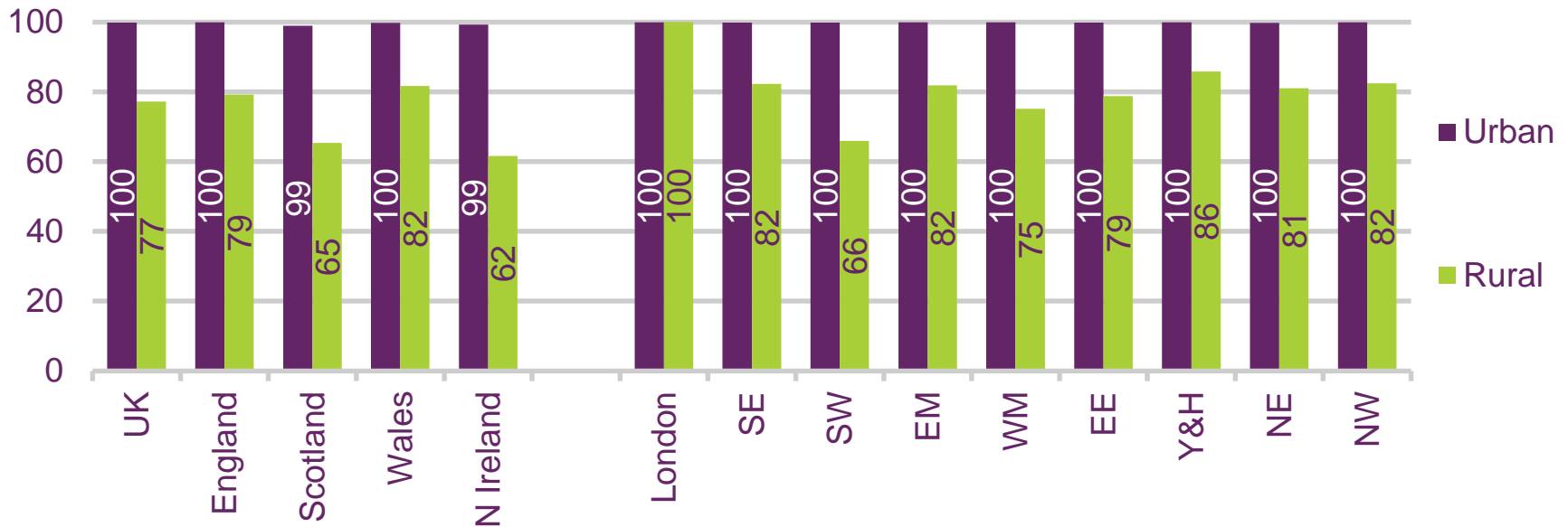
Proportion of premises (per cent)



Source: Ofcom / BT, data as at December of each year

Proportion of premises in urban and rural areas connected to an unbundled exchange

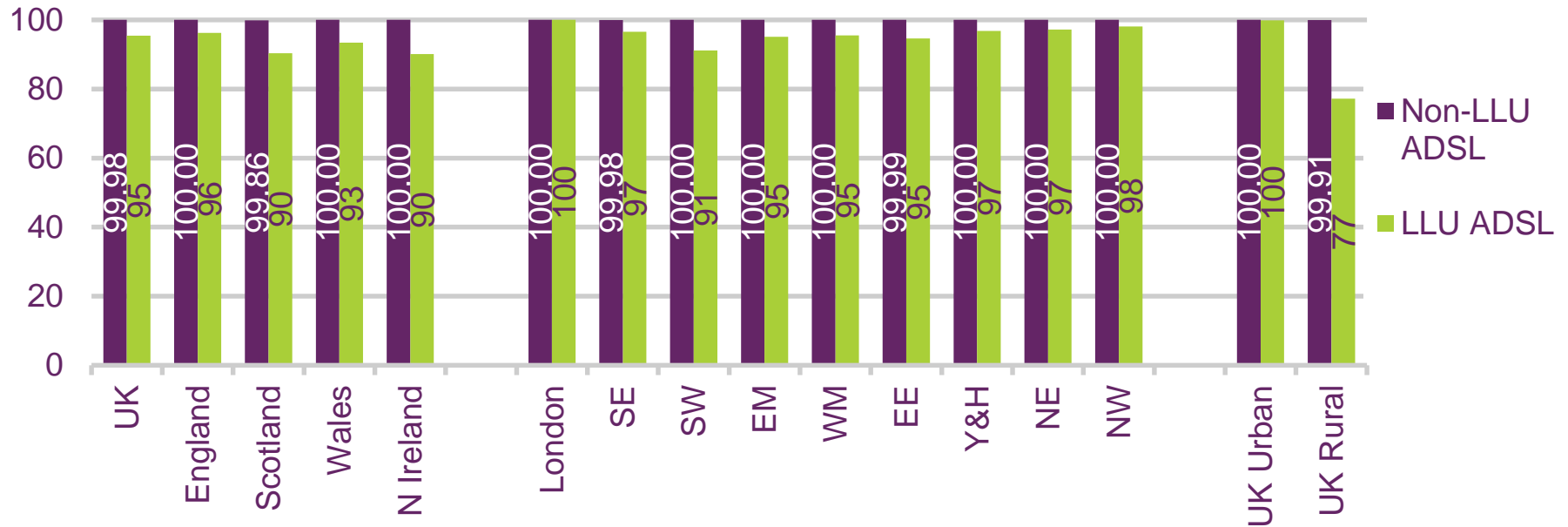
Proportion of premises (per cent)



Source: Ofcom / BT, December 2015 data

Proportion of premises connected to ADSL-enabled and LLU-enabled exchanges

Proportion of premises (per cent)



Source: Ofcom / BT, December 2015 data

Proportion of premises able to receive broadband services with over 10Mbit/s speeds

Proportion of premises (per cent)



Source: Ofcom / operators, June 2016 data

Note: UK urban and rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications.

Proportion of premises able to receive superfast broadband services

Proportion of premises (per cent)



Source: Ofcom / operators, June 2016 data

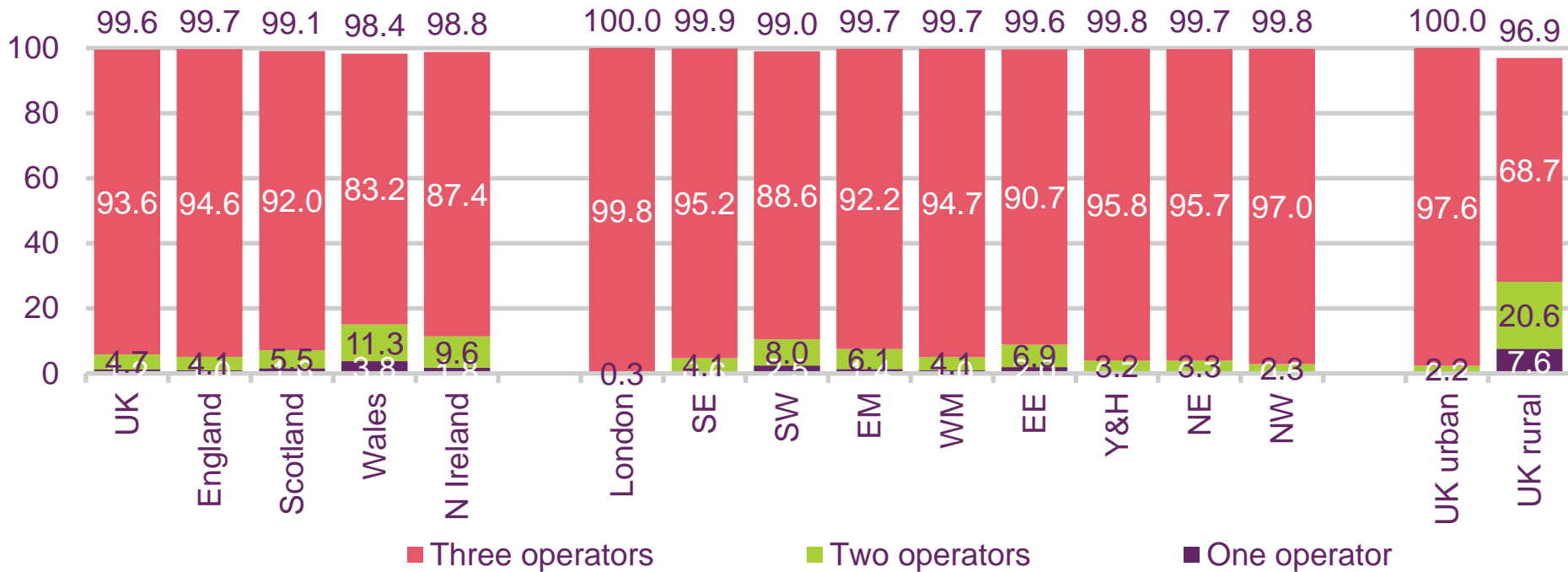
Note: UK urban and rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications.

Mobile coverage

Figure 4.2

Outdoor 2G premises mobile coverage, by number of operators

Proportion of premises (per cent)

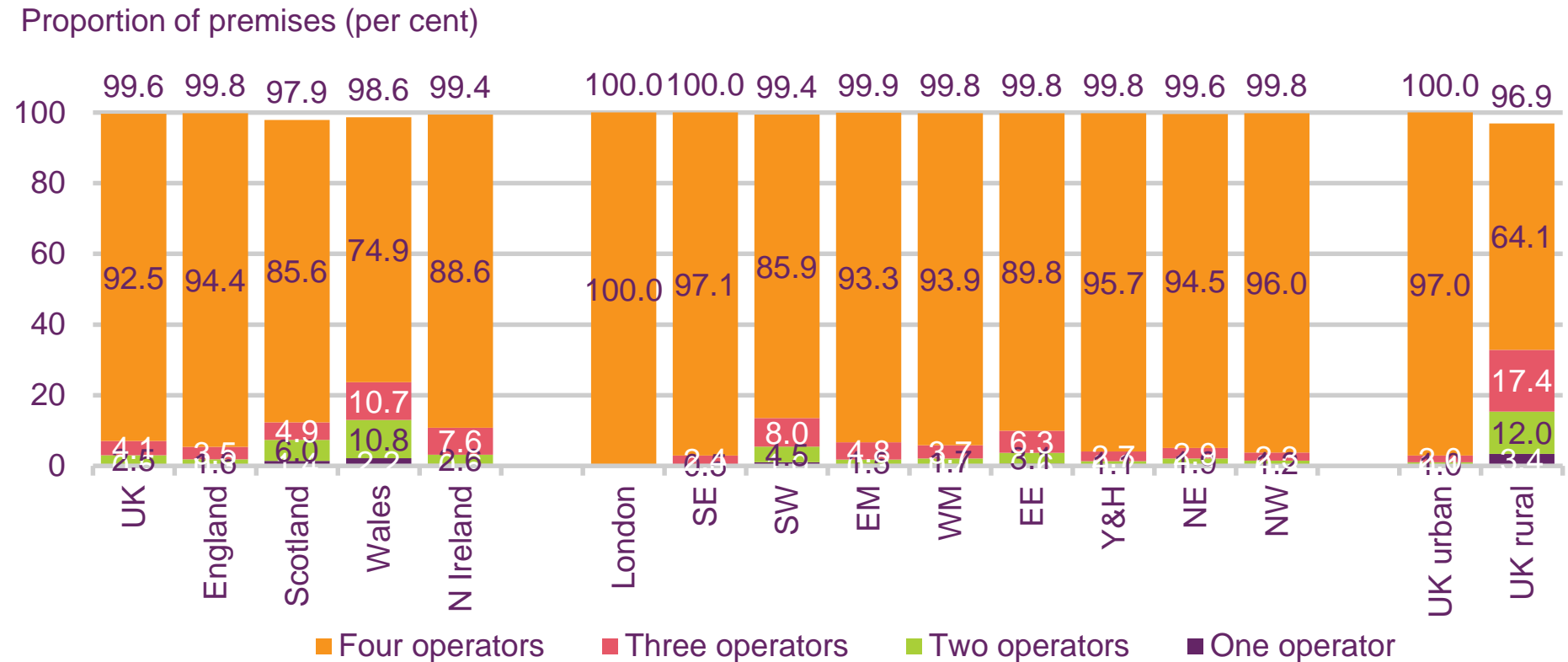


Source: Ofcom / operators, May 2016 data

Note: Coverage is based on 100m² pixels covering the UK; UK urban and UK rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications used to calculate them.

Figure 4.3

Outdoor 3G premises mobile coverage, by number of operators



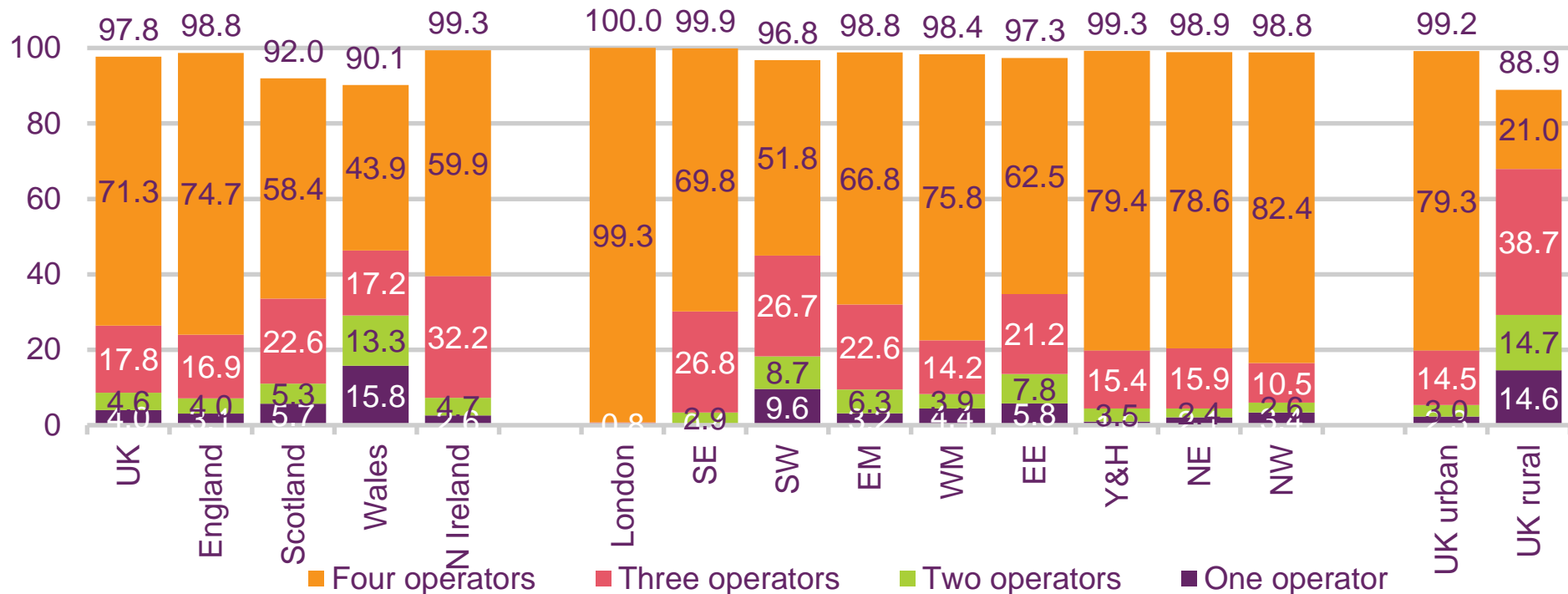
Source: Ofcom / operators, May 2016 data

Note: Coverage is based on 100m² pixels covering the UK; UK urban and UK rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications used to calculate them.

Figure 4.4

Outdoor 4G premises mobile coverage, by number of operators

Proportion of premises (per cent)



Source: Ofcom / operators, May 2016 data

Note: Coverage is based on 100m² pixels covering the UK; UK urban and UK rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications used to calculate them.

Service-take-up

Take-up of communications services, 2016

		UK	N Ireland	England	Scotland	Wales	NI urban	NI rural
Individual								
Voice telephony	Fixed Line	86%	86%	86%	86%	85%	85%	89%
	Mobile phone	93%	92%	94%	91%	91%	90%	94%
	Smartphone	71%	72%	71%	70%	65%	70%	73%
Internet	Computer (any type)	84%	80%	85%	79%	85%	77%	86%↑
	Tablet computer	59%	60%	59%	56%	67%	55%	67%↑
	Total Internet ¹	86%	83%	87%	84%	84%	80%	87%
	Broadband (fixed and mobile) ²	81%	78%	81%	79%	79%	75%	84%↑
	Fixed Broadband	79%	77%	79%	78%	77%	74%	82%
	Mobile Broadband (via dongle/SIM) ³	4%	3%	5%	3%	4%	3%	3%
	Web access on mobile phone ⁴	66%	69%	66%	63%	61%	68%	70%

Source: Ofcom Technology Tracker, Half 1 2016

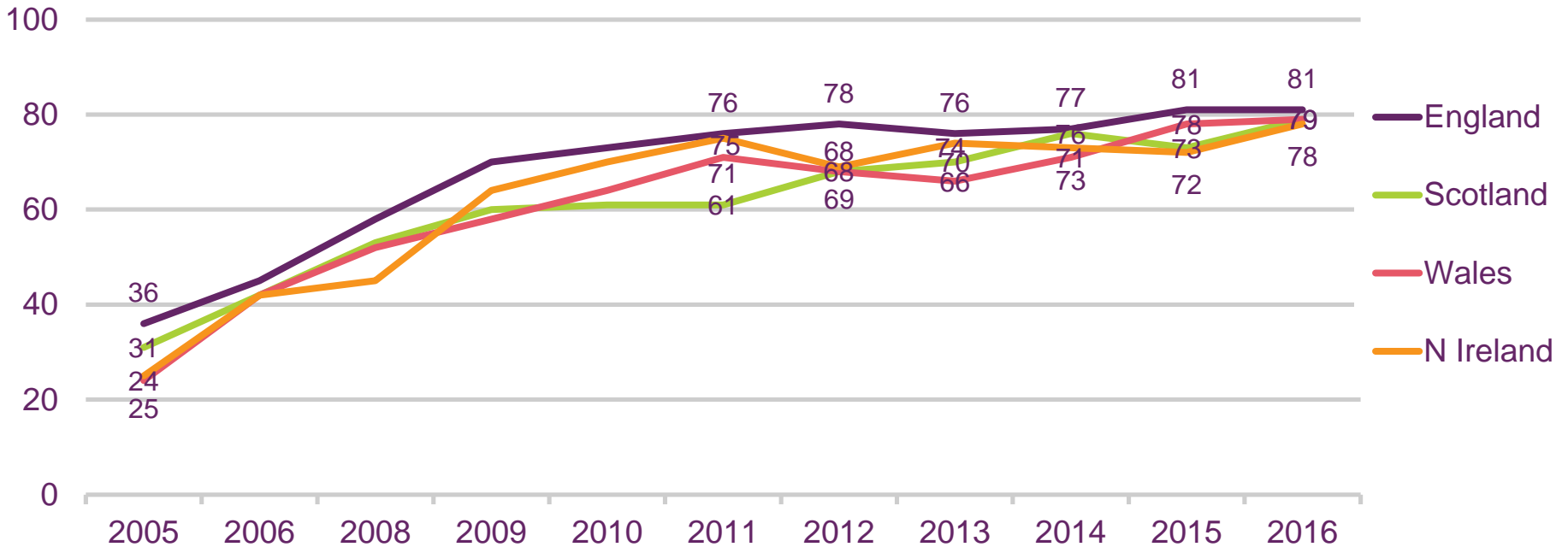
Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016 and between Northern Ireland urban and rural in 2016.

QC1: Is there a landline phone in your home that can be used to make and receive calls?/ QD2: Do you personally use a mobile phone?/ QD4: Do you personally use a smartphone?/ QE1: Does your household have a PC or laptop computer?/ QE2: Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QE9: Which of these methods does your household use to connect to the Internet at home?/ QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Broadband take-up

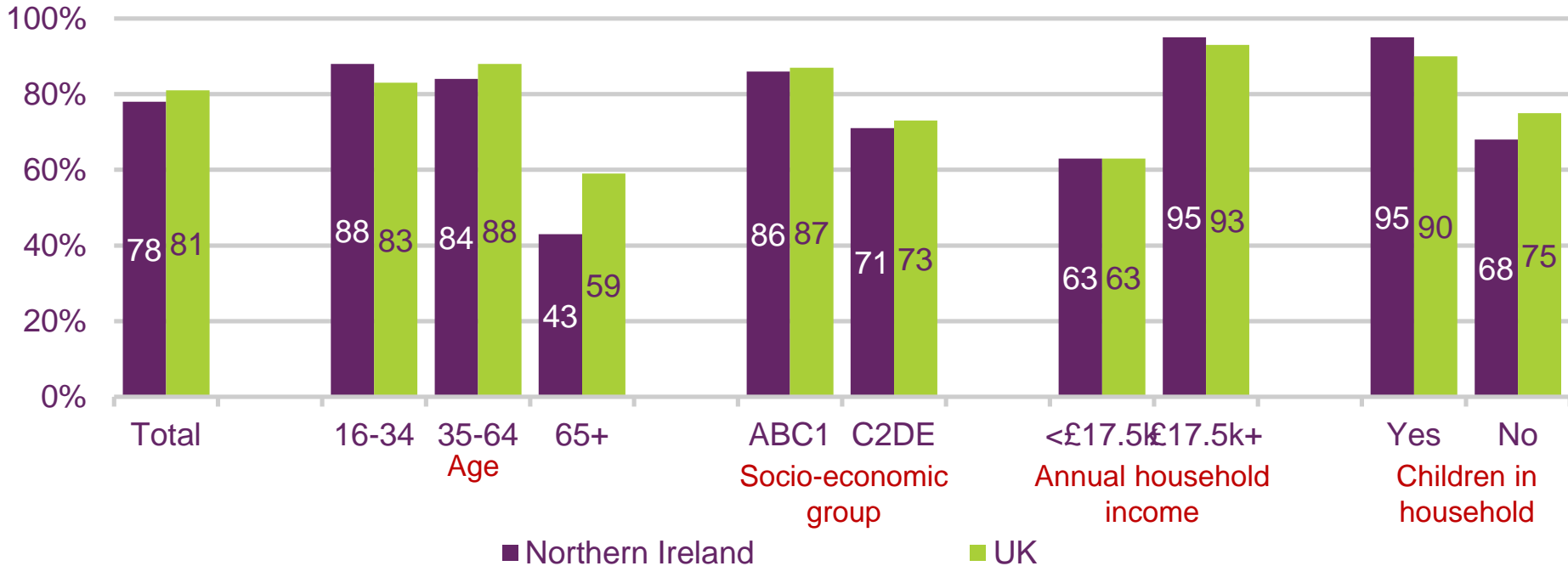
Take up (% of homes)



Source: Ofcom Technology Tracker, Half 1 2016
 Base: All adults aged 16+ (2239 England, 502 Scotland, 489 Wales, 507 Northern Ireland)
 QE9: Which of these methods does your household use to connect to the internet at home?

Consumer broadband take-up in Northern Ireland, by demographic

Proportion of respondents (%)



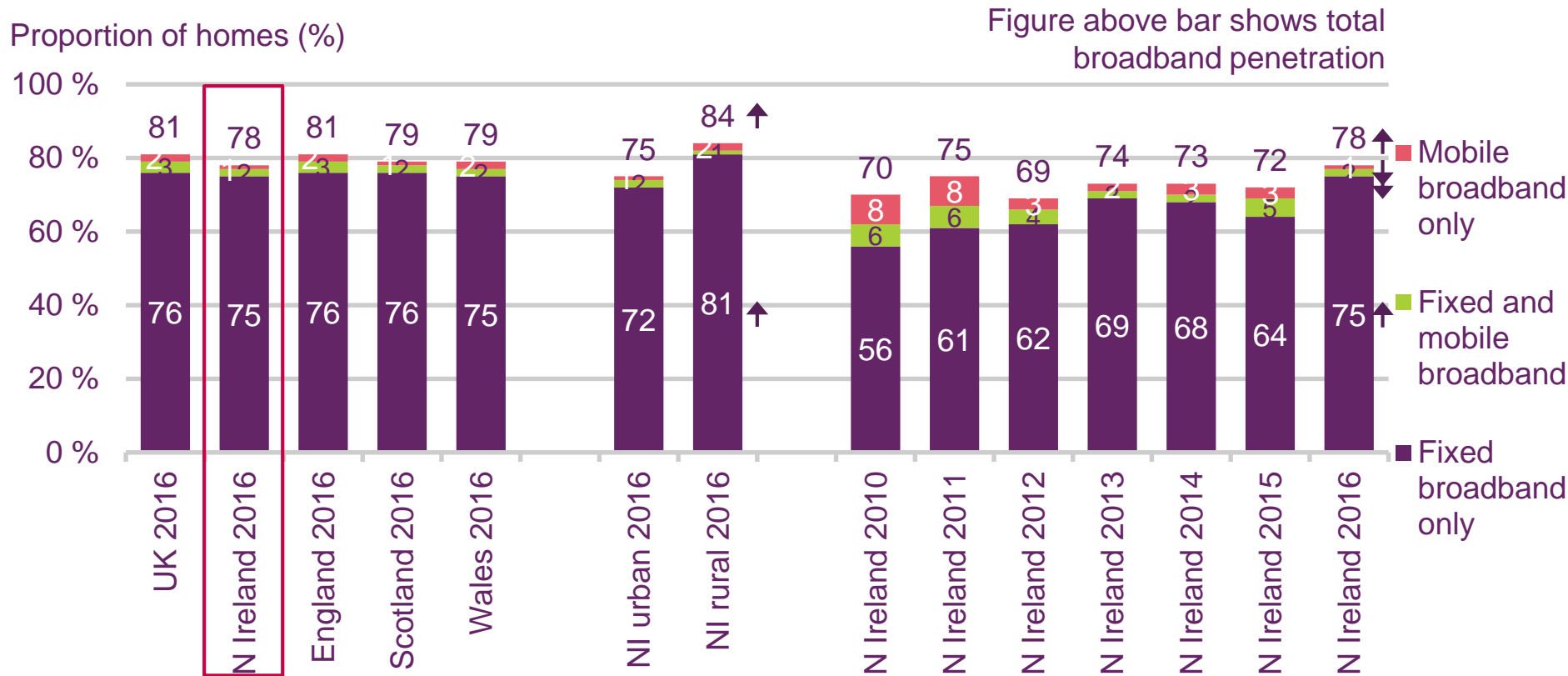
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n =507 Northern Ireland, 168 16-34s, 241 35-64s, 98* 65+, 226 ABC1, 279 C2DE, 114 <£17.5k income, 90* £17.5k+, 187 children in home, 320 no children in home) *Caution: low base

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016 for each measure.

QE9: Which of these methods does your household use to connect to the internet at home?

Consumer broadband, by connection type



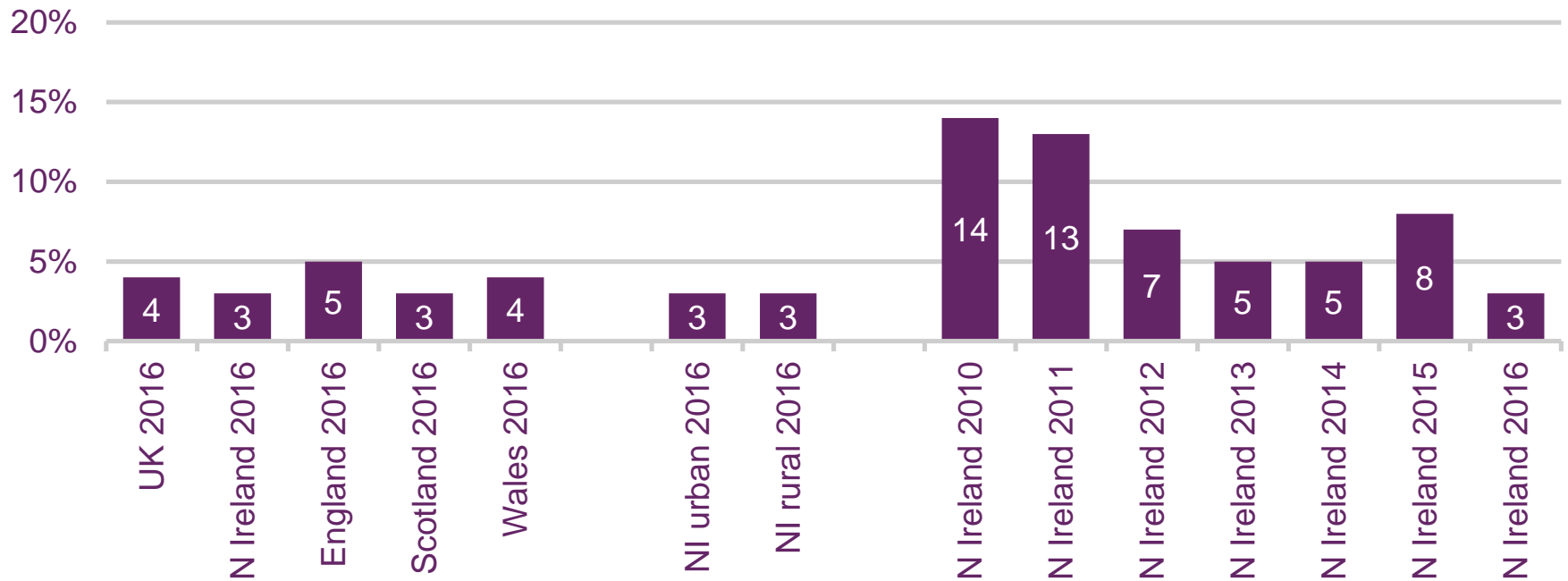
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016, between Northern Ireland urban and rural in 2016 and between Northern Ireland 2015 and 2016.

QE9: Which of these methods does your household use to connect to the internet at home?

Mobile broadband take-up



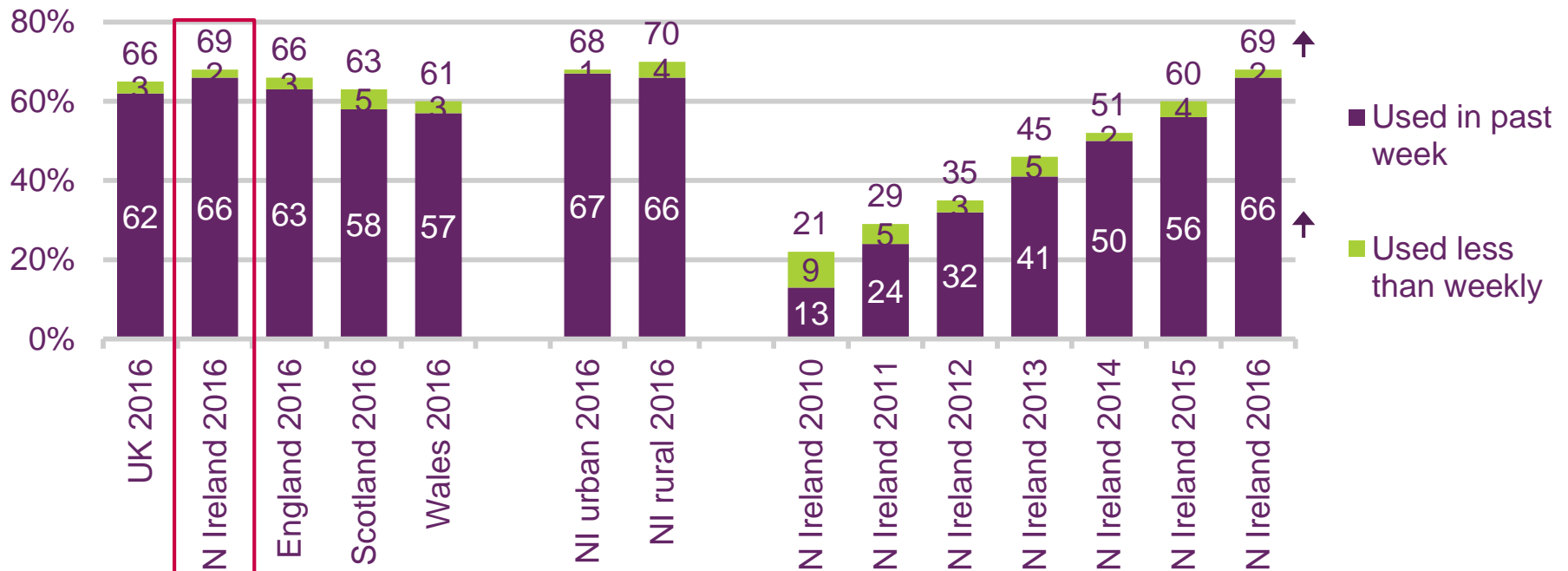
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

QE9: Which of these methods does your household use to connect to the Internet at home?

Proportion of adults who have used a mobile phone to access the internet

Proportion of respondents (%)



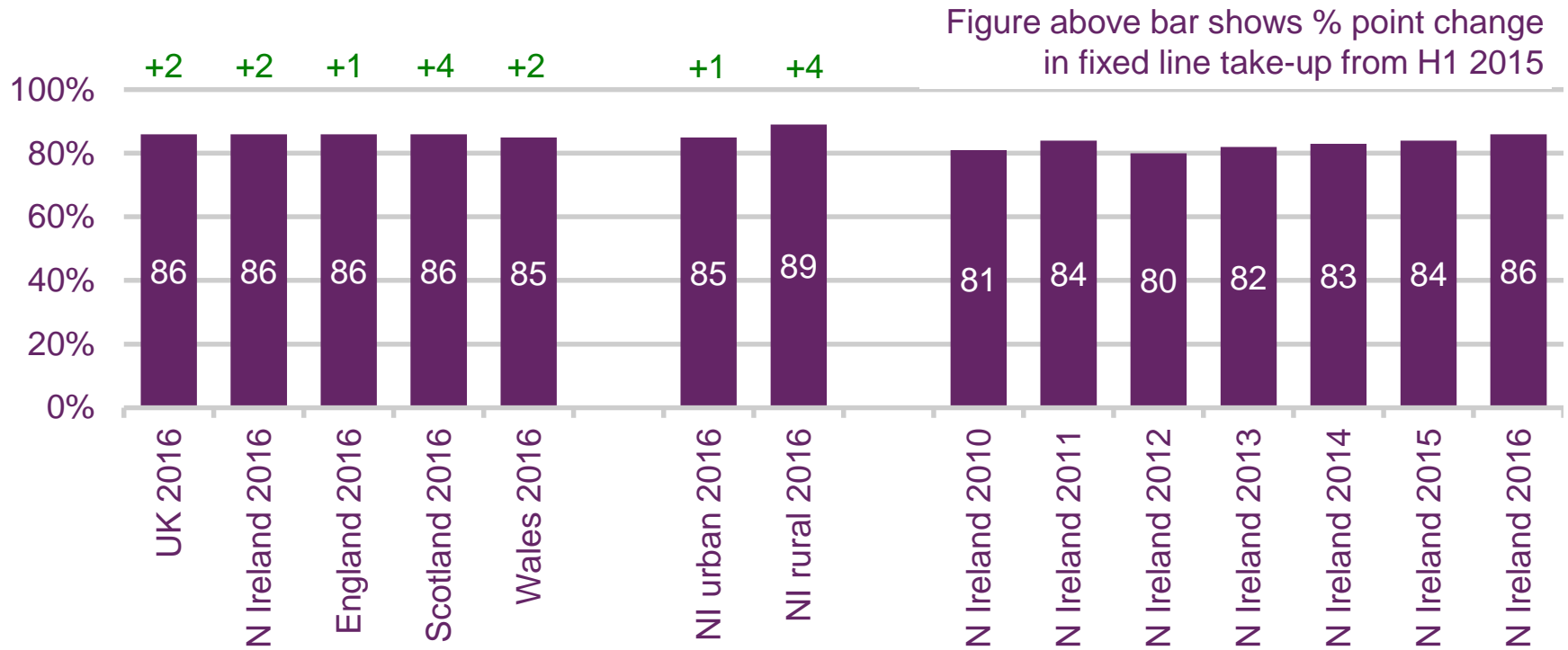
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016, between Northern Ireland urban and rural in 2016 and between Northern Ireland 2015 and 2016.

QD28A: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ QD28B: And, which of these activities have you used your mobile for in the last week?

Fixed line take-up

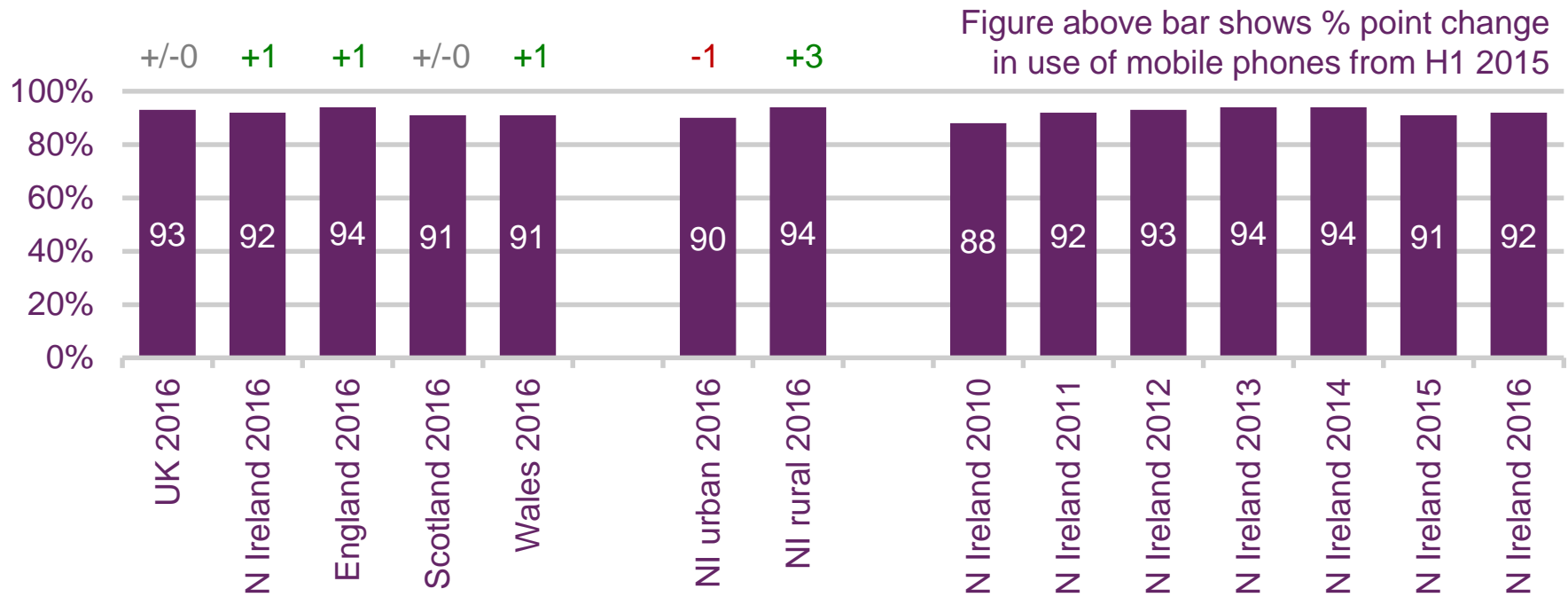


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

QC1: Is there a landline phone in your home that can be used to make and receive calls?

Mobile take-up



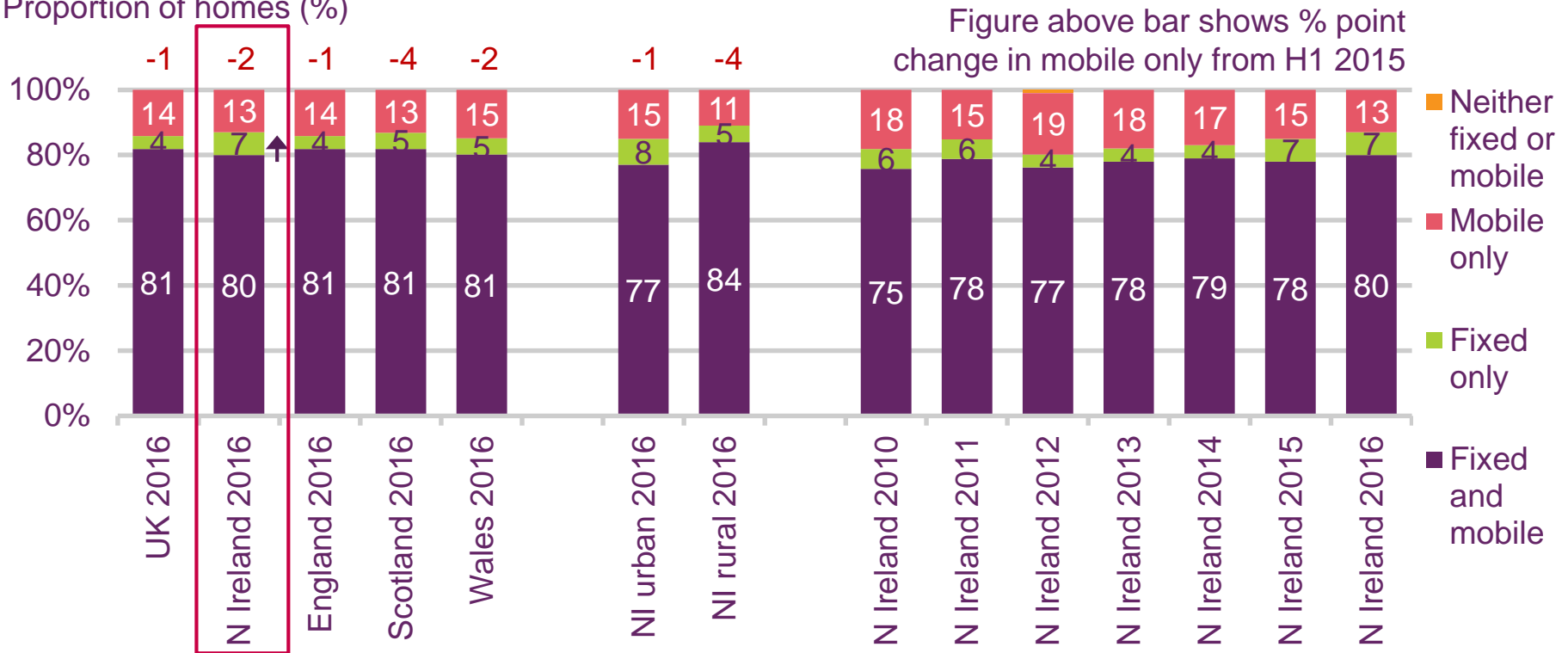
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

QD2: Do you personally use a mobile phone?

Cross-ownership of household telephony services

Proportion of homes (%)



Source: Ofcom Technology Tracker, Half 1 2016

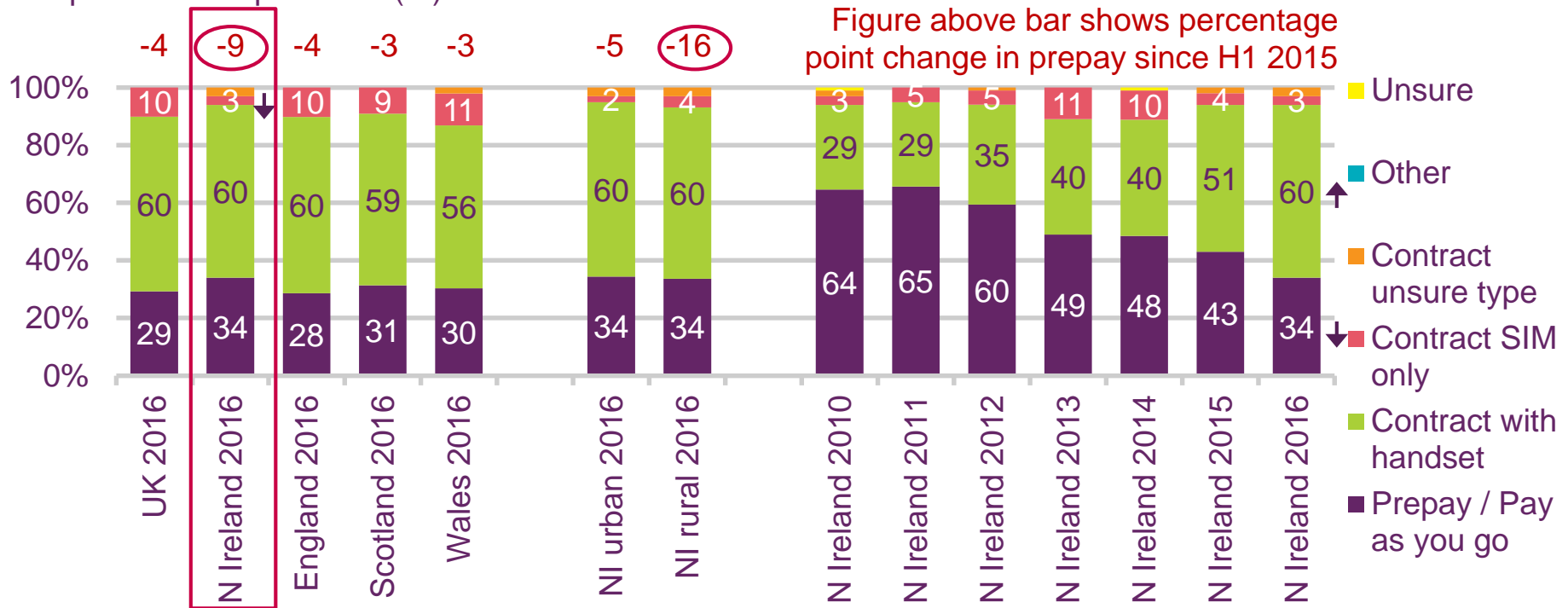
Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013, 499 Northern Ireland 2014, 504 Northern Ireland 2015, 507 Northern Ireland 2016)

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

QC1: Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Type of mobile subscription

Proportion of respondents (%)



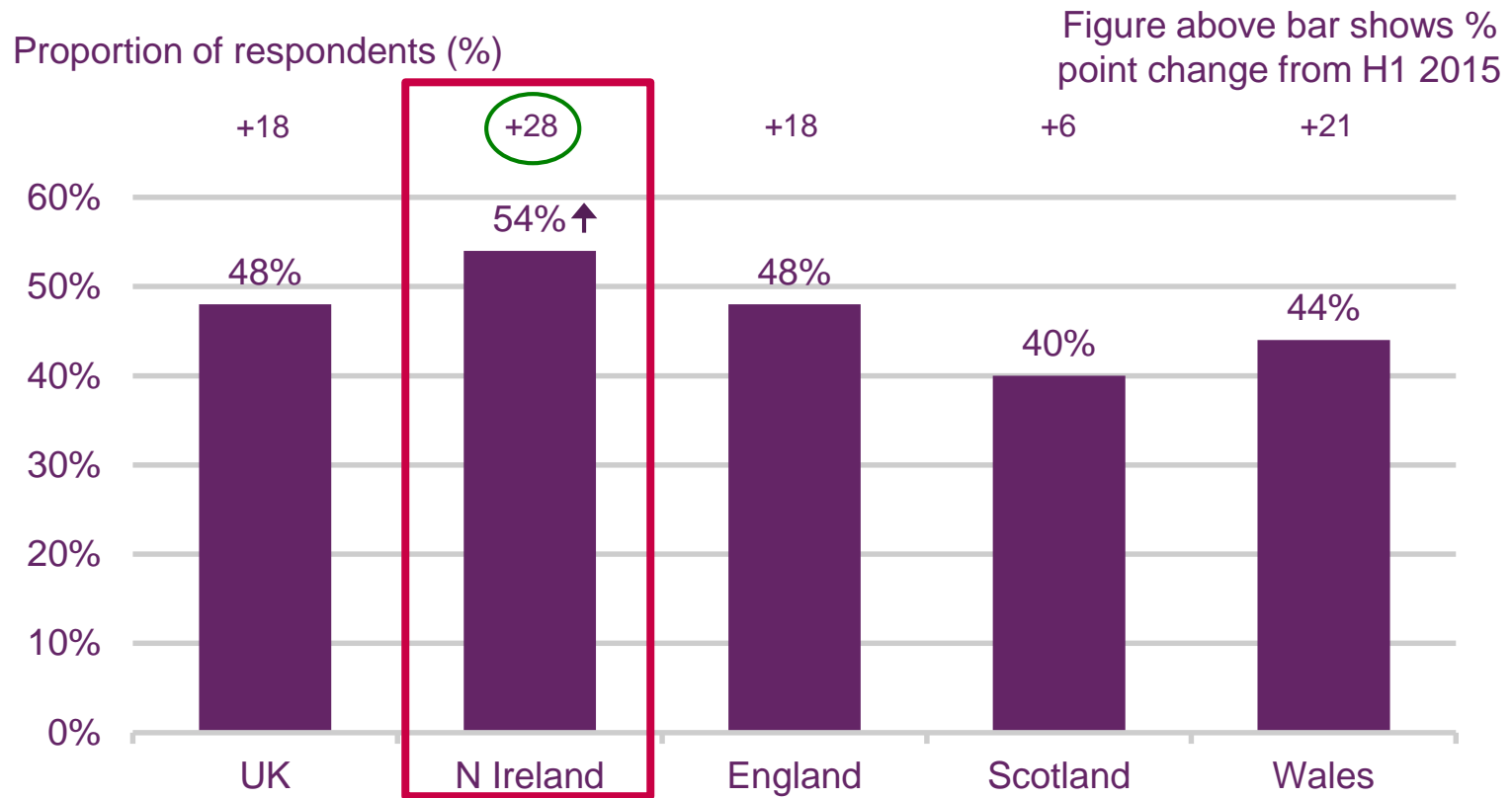
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 446 Northern Ireland, 2083 England, 451 Scotland, 445 Wales, 226 Northern Ireland urban, 220 Northern Ireland rural, 658 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013, 465 Northern Ireland 2014, 456 Northern Ireland 2015, 446 Northern Ireland 2016)

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

QD11: Which of these best describes the mobile package you personally use most often?

4G take-up



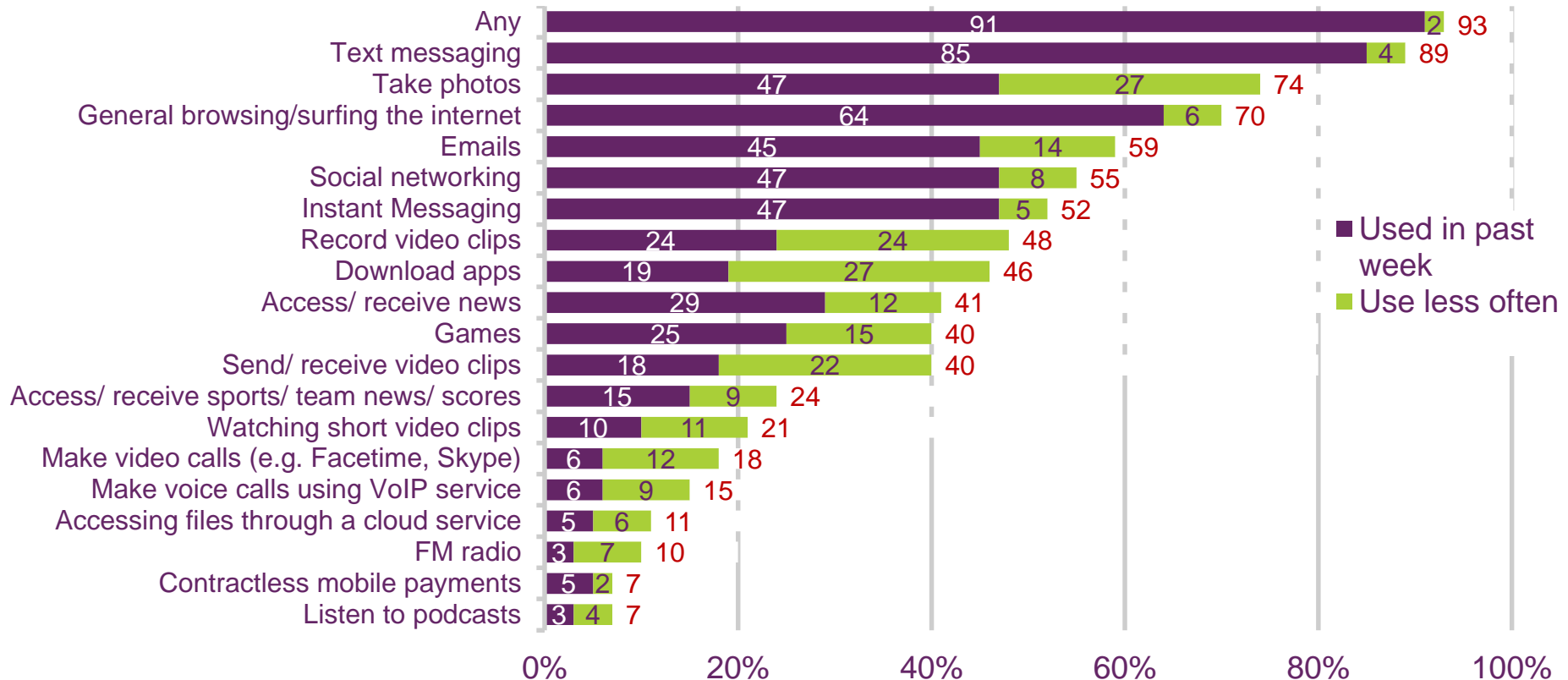
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016. A circle around the +/- figure above the chart indicates any significant difference between 2015 and 2016 for Northern Ireland.

QD41. Do you have a 4G service? This is a service that enables faster mobile internet access

Use of mobile applications

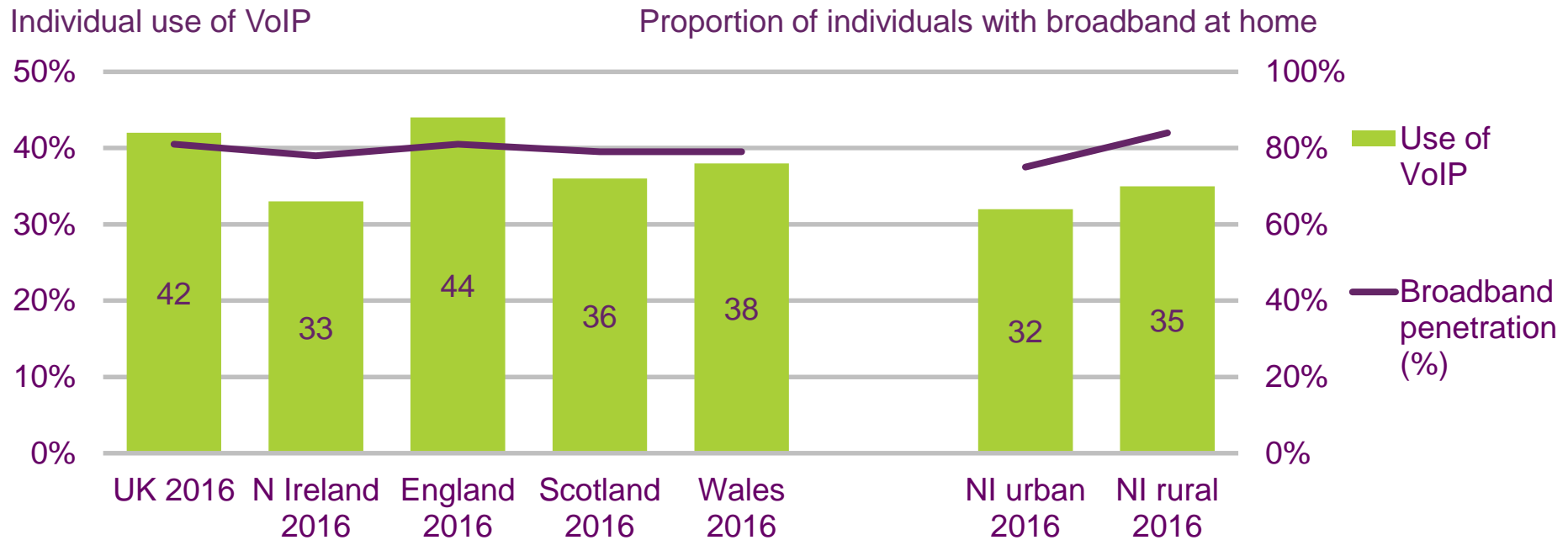


Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n= 446 Northern Ireland 2016)

QD28A: Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Individual use of Voice over IP



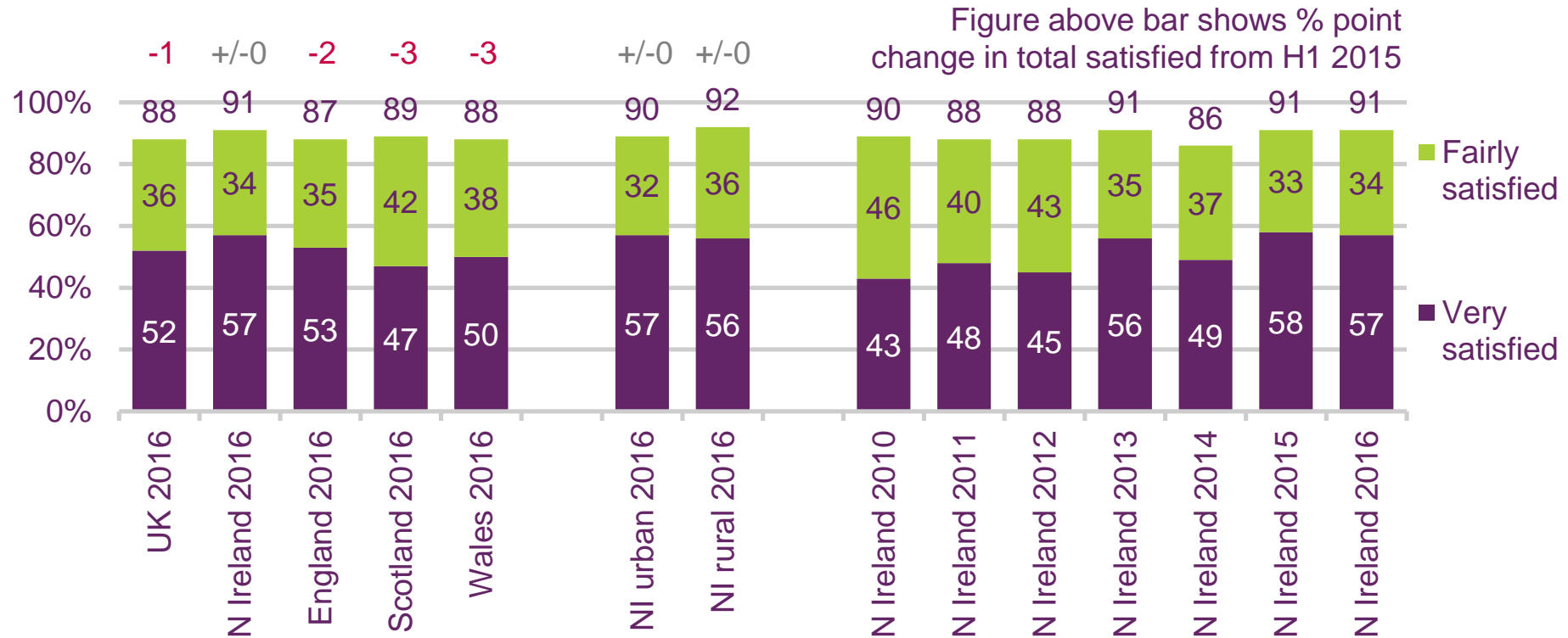
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 507 Northern Ireland, 2239 England, 502 Scotland, 489 Wales, 262 Northern Ireland urban, 245 Northern Ireland rural)

QE30: Have you or anyone in your household ever used one of these services to make voice calls using the internet? (Skype, Vonage, BT Communicator, BT Broadband voice/Home hub, Voipfone, Plusnet (Plustalk), Facebook, WhatsApp, Facetime, other) / QE5A: Which, if any, of these do you use the internet for? (Desktop, laptop, netbook, tablet, smartphone, standard landline, dedicated handset, TV, smartwatch, other)

Satisfaction with telecoms services

Overall satisfaction with fixed line services



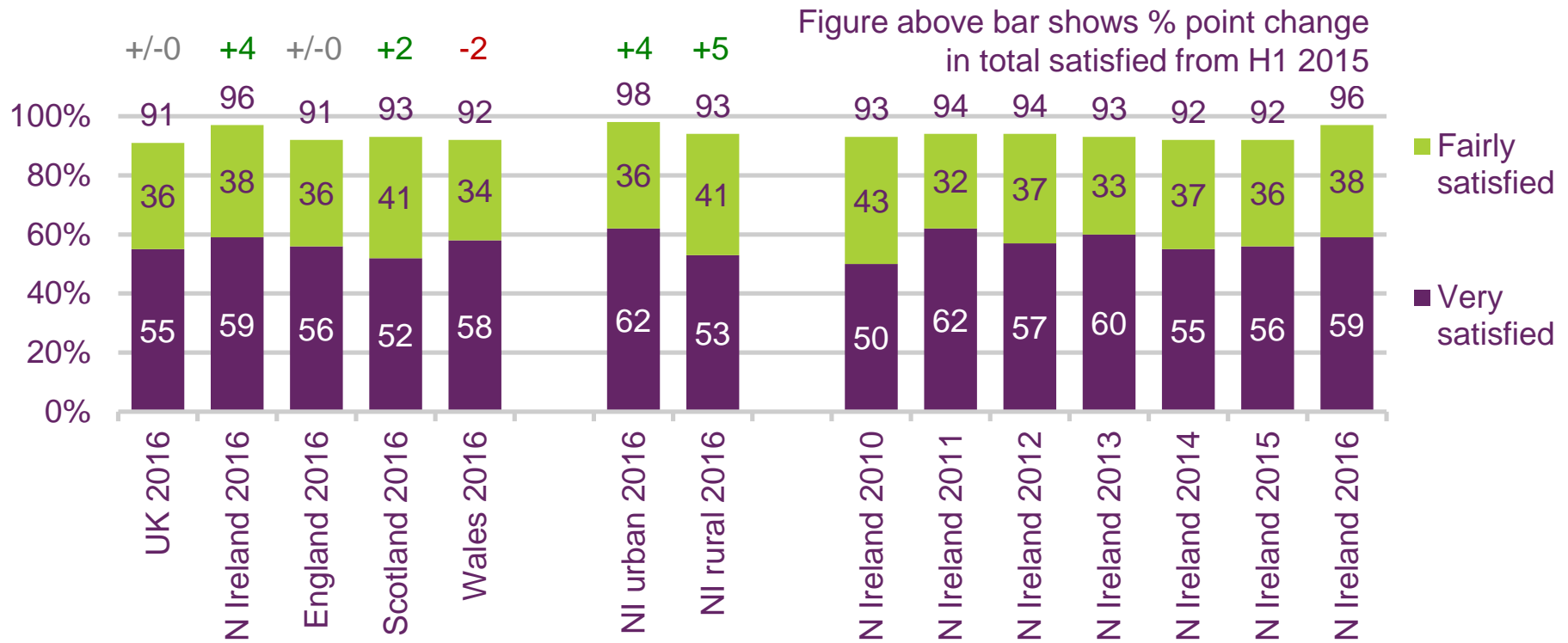
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a landline phone at home (n = 3151 UK, 440 Northern Ireland, 1885 England, 415 Scotland, 411 Wales, 225 Northern Ireland urban, 215 Northern Ireland rural, 628 Northern Ireland 2010, 434 Northern Ireland 2011, 415 Northern Ireland 2012, 424 Northern Ireland 2013, 421 Northern Ireland 2014, 417 Northern Ireland 2015, 440 Northern Ireland 2016)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed line service

QC13A: Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Overall satisfaction with mobile phone service



Source: Ofcom Technology Tracker, Half 1 2016

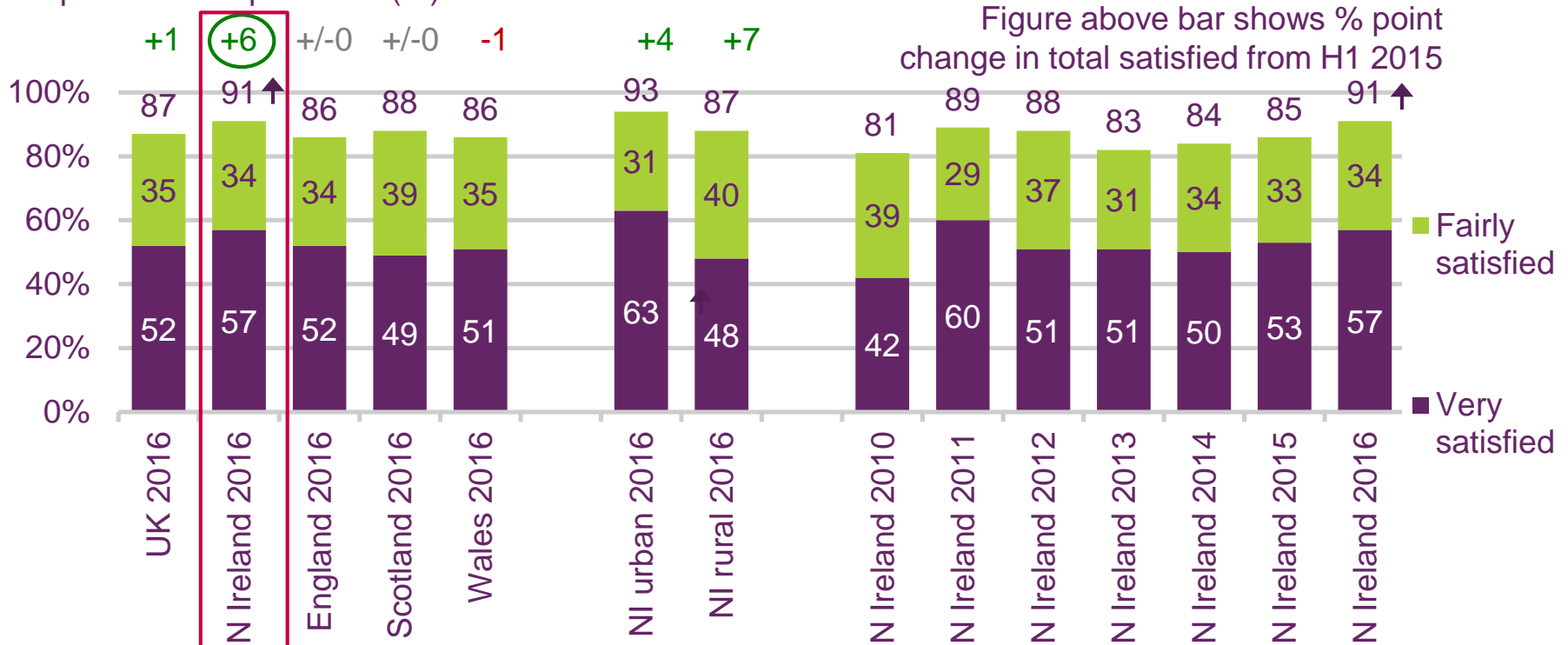
Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 446 Northern Ireland, 2083 England, 451 Scotland, 445 Wales, 226 Northern Ireland urban, 220 Northern Ireland rural, 658 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013, 465 Northern Ireland 2014, 456 Northern Ireland 2015, 446 Northern Ireland 2016)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall mobile service

QD21A: Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Satisfaction with reception of mobile service

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 446 Northern Ireland, 2083 England, 451 Scotland, 445 Wales, 226 Northern Ireland urban, 220 Northern Ireland rural, 658 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013, 465 Northern Ireland 2014, 456 Northern Ireland 2015, 446 Northern Ireland 2016)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their mobile reception

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

QD21J: Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Satisfaction with ability to connect to the internet via 3G or 4G network

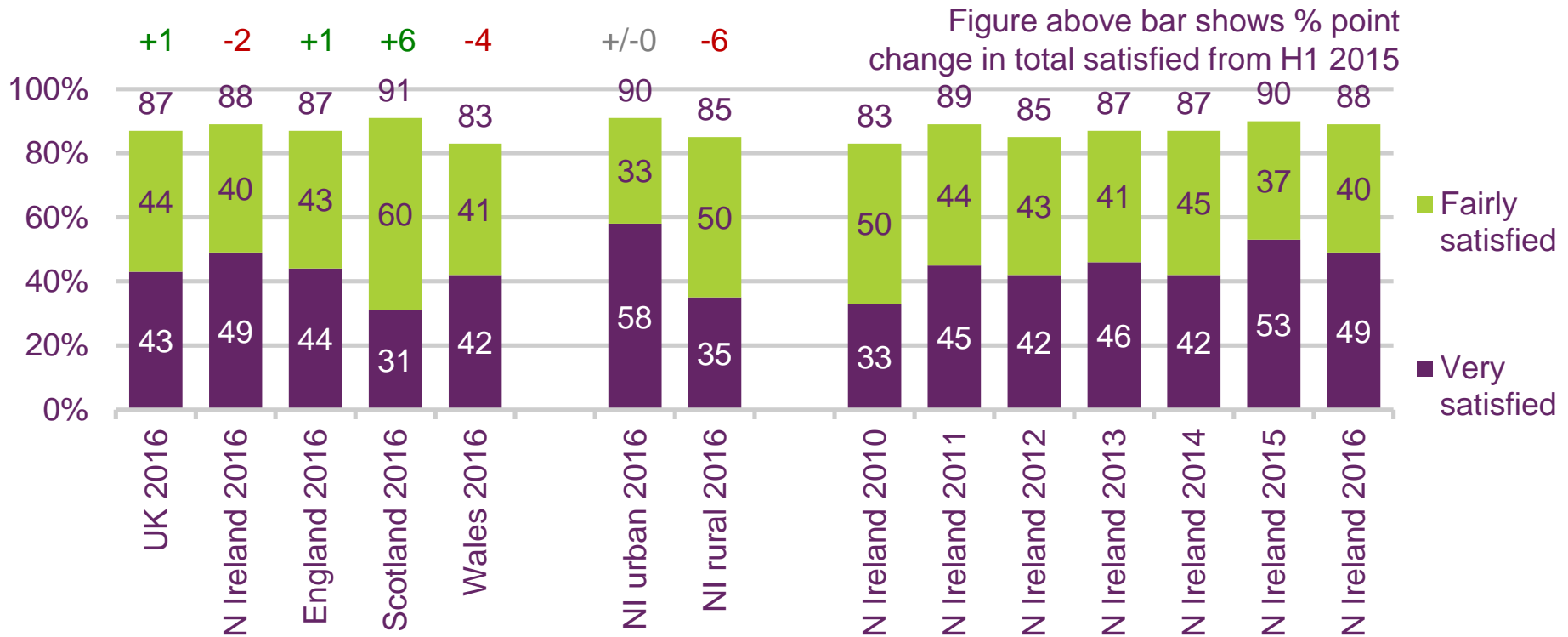


Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a smartphone (n = 2487 UK, 345 Northern Ireland, 1532 England, 319 Scotland, 291 Wales, 176 Northern Ireland urban, 169 Northern Ireland rural)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with the ability to connect to the internet using the mobile network QD21K: Thinking about your mobile phone service only, how satisfied are you with (main supplier) for ability to connect to the internet using the mobile network (3G or 4G)?

Overall satisfaction with fixed broadband service



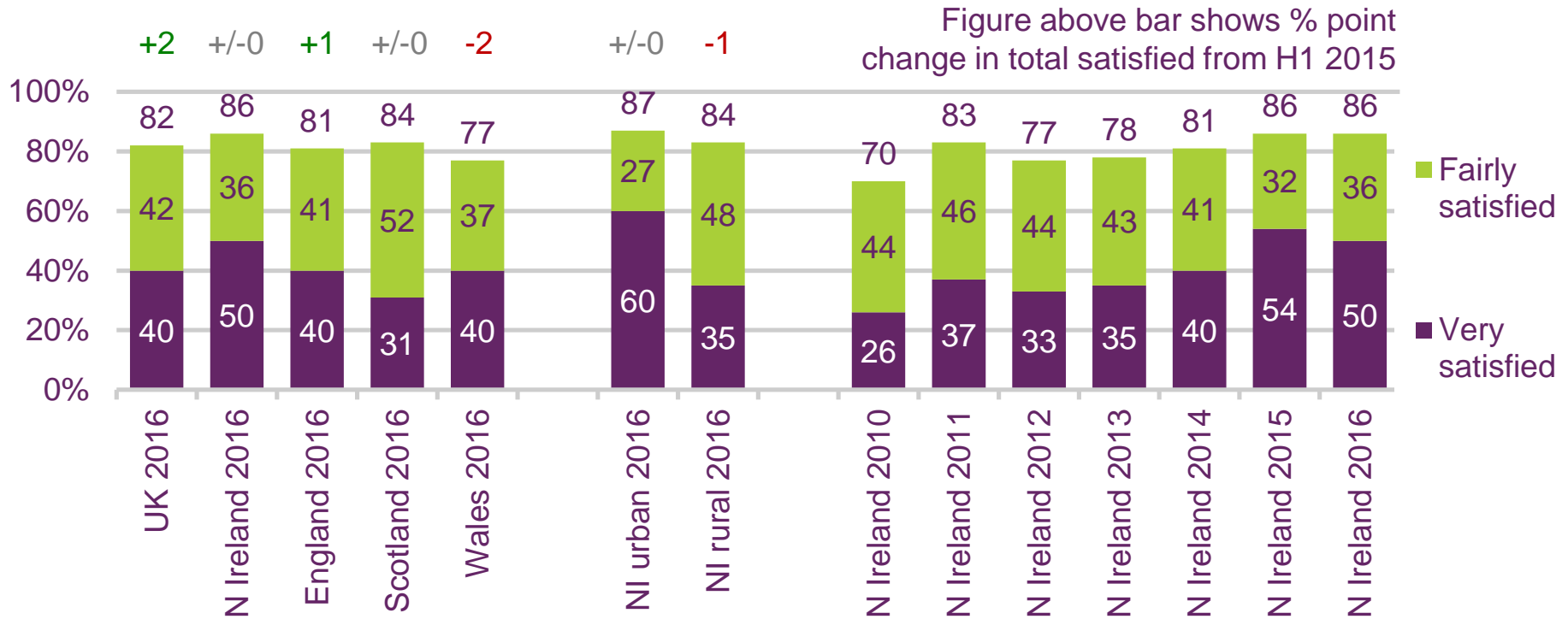
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2774 UK, 353 Northern Ireland, 1701 England, 357 Scotland, 363 Wales, 173 Northern Ireland urban, 180 Northern Ireland rural, 469 Northern Ireland 2010, 335 Northern Ireland 2011, 331 Northern Ireland 2012, 351 Northern Ireland 2013, 347 Northern Ireland 2014, 335 Northern Ireland 2015, 353 Northern Ireland 2016)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed broadband service

QE8A: Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Satisfaction with speed of fixed broadband connection



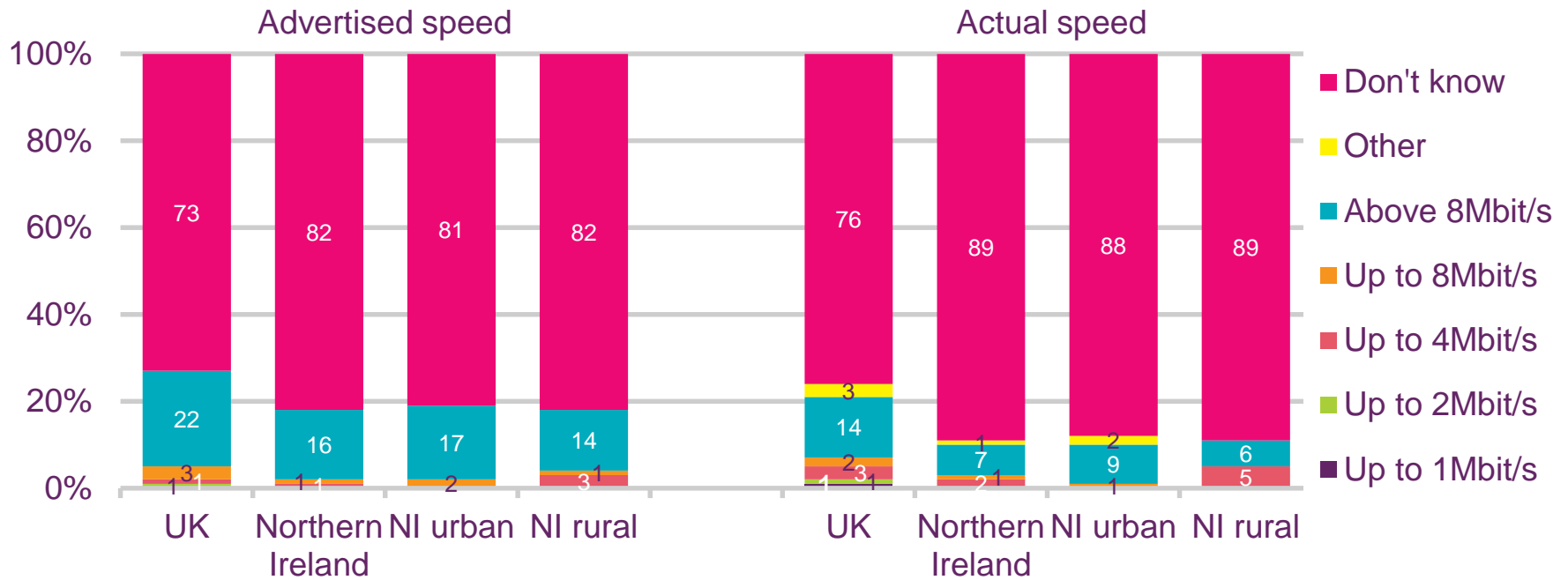
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2774 UK, 353 Northern Ireland, 1701 England, 357 Scotland, 363 Wales, 173 Northern Ireland urban, 180 Northern Ireland rural, 469 Northern Ireland 2010, 335 Northern Ireland 2011, 331 Northern Ireland 2012, 351 Northern Ireland 2013, 347 Northern Ireland 2014, 335 Northern Ireland 2015, 353 Northern Ireland 2016)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online

QE8B: Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Awareness of advertised and actual broadband speeds in Northern Ireland



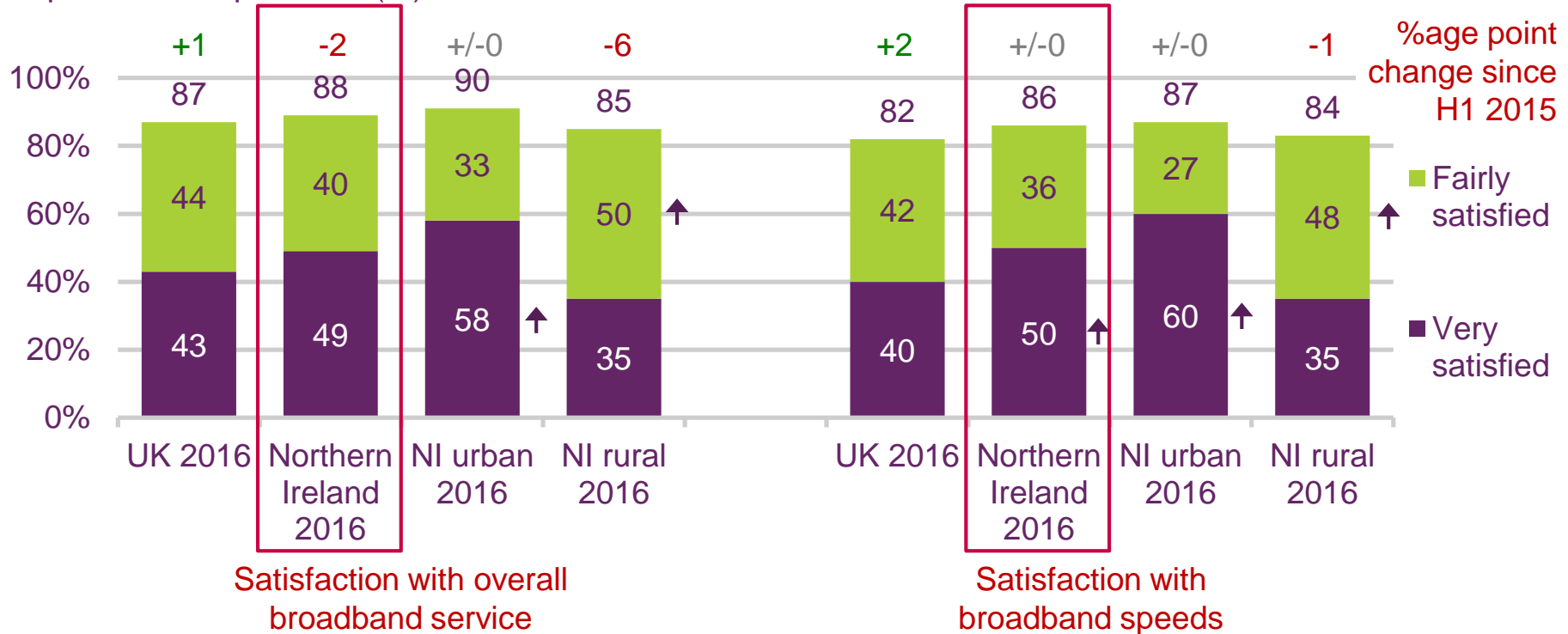
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with broadband connection at home (n = 2774 UK, 353 Northern Ireland, 173 Northern Ireland urban, 180 Northern Ireland rural)

QENEW11: What was the advertised speed of your fixed broadband home internet connection when you took up your service?/ QE11A: What is the actual speed of your fixed broadband home internet connection?

Satisfaction with overall service and speed of fixed broadband connection

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2774 UK, 353 Northern Ireland, 173 Northern Ireland urban, 180 Northern Ireland rural)

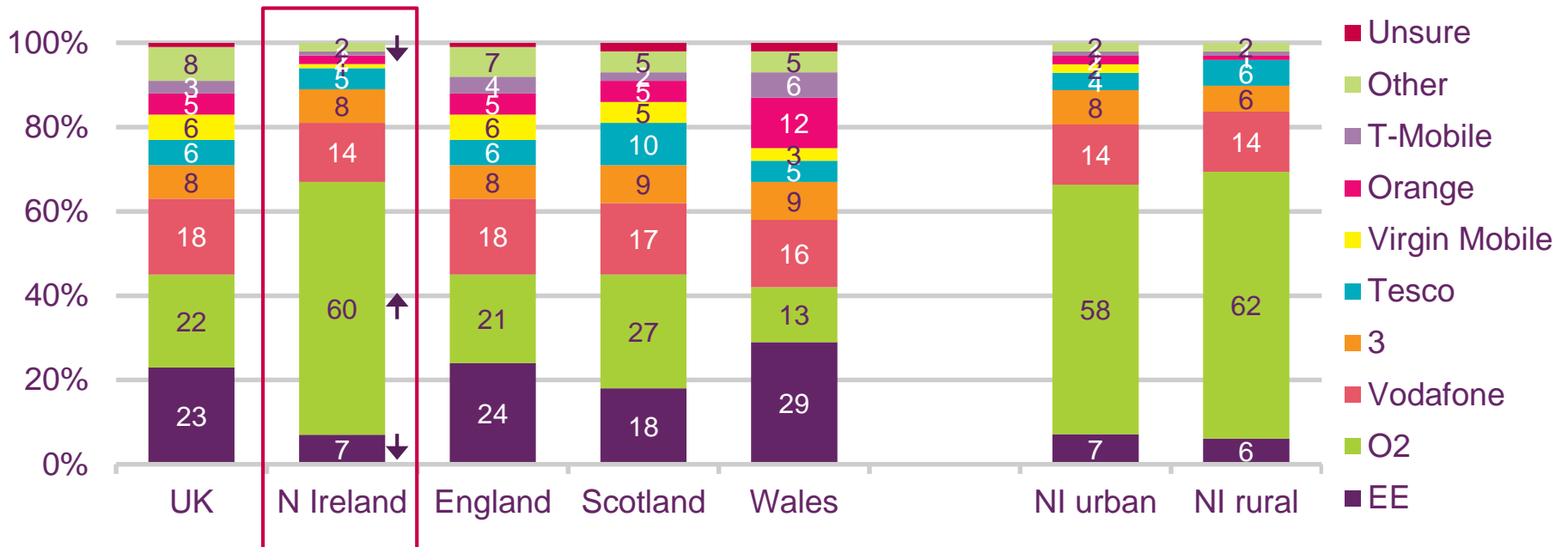
Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online

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

QE8A/B: Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service/ for the speed of your service while online (not just the connection)?

Mobile network provider used most often

Proportion of mobile users (%)



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 446 Northern Ireland, 2083 England, 451 Scotland, 445 Wales, 226 Northern Ireland urban, 220 Northern Ireland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Northern Ireland and UK in 2016 and between Northern Ireland urban and rural in 2016.

QD10: Which mobile network do you use most often?

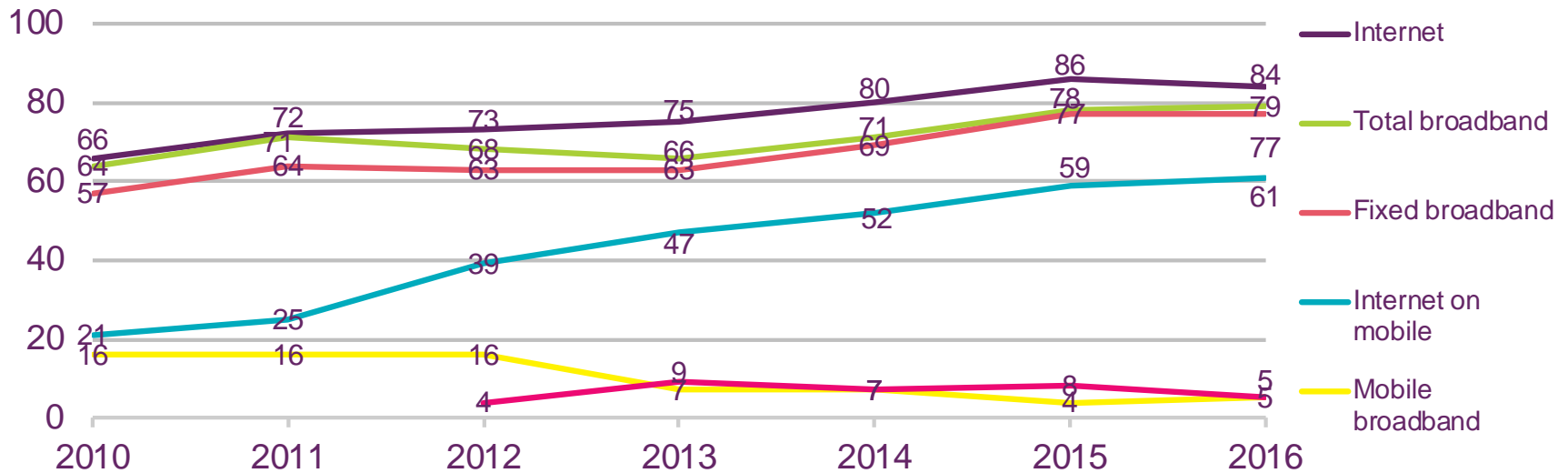
5. Internet and online content

Figure 5.1



Internet take-up in Wales: 2010-2016

Households (%)



Source: Ofcom Technology Tracker. Data from Q1 of each year 2010-2014, then H1 2015 and 2016

Base: All adults aged 16+ (n = 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 489 Wales 2016)

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

Note 1: 'Internet' includes access to the internet at home (via any device, e.g. PC, mobile phone, tablet etc.

Note 2: 'Total broadband' includes the following methods to connect to the internet at home – fixed broadband (via phone line or cable service), mobile broadband (via a USB stick or dongle, or built-in connectivity in a laptop/netbook/tablet with a SIM), tethering (via mobile phone internet connection on laptop/tablet), and mobile broadband wireless router (via 3G or 4G mobile network, which can be shared between devices).

Note 3: 'Fixed broadband' includes ADSL, cable and fibre services – perhaps using a Wi-Fi router. This includes superfast broadband services.

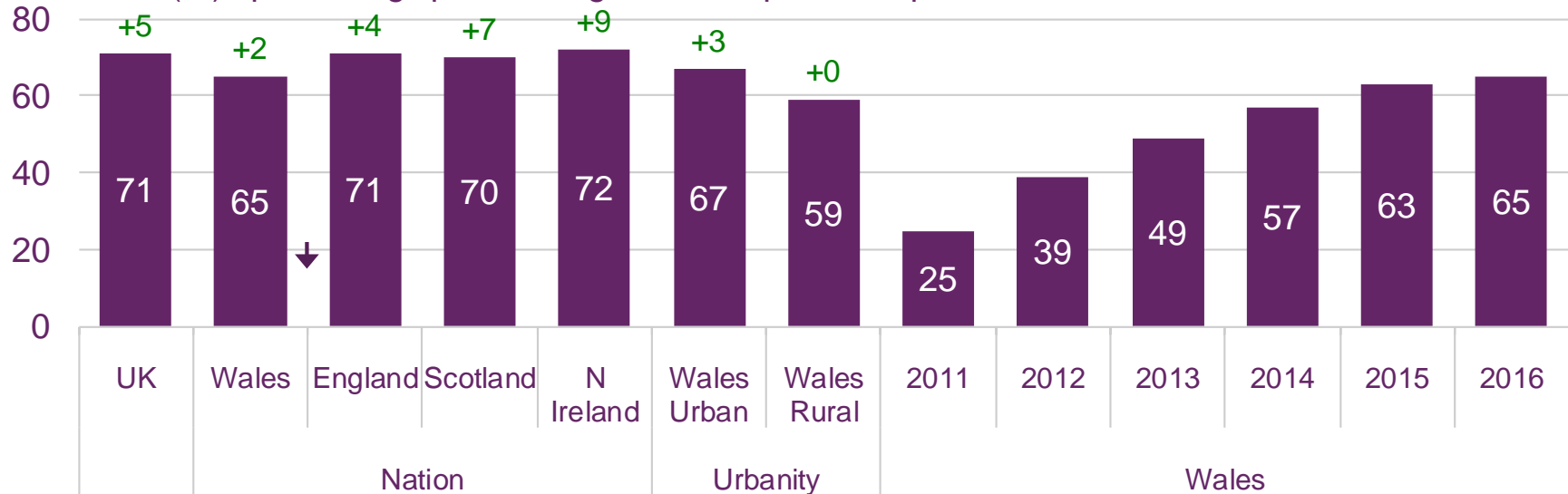
Note 4: 'Mobile broadband' is connecting a device using a USB stick or dongle, or built-in connectivity in a laptop or netbook or tablet computer with a SIM card.

Note 5: 'Internet on mobile' is the proportion of adults who use a mobile phone for any of the following activities: instant messaging, downloading apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

Figure 5.2

Take-up of smartphones in Wales

Adults 16+ (%) / percentage point change in take-up of smartphones from H1 2015



Source: Ofcom Technology Tracker, H1 2016

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

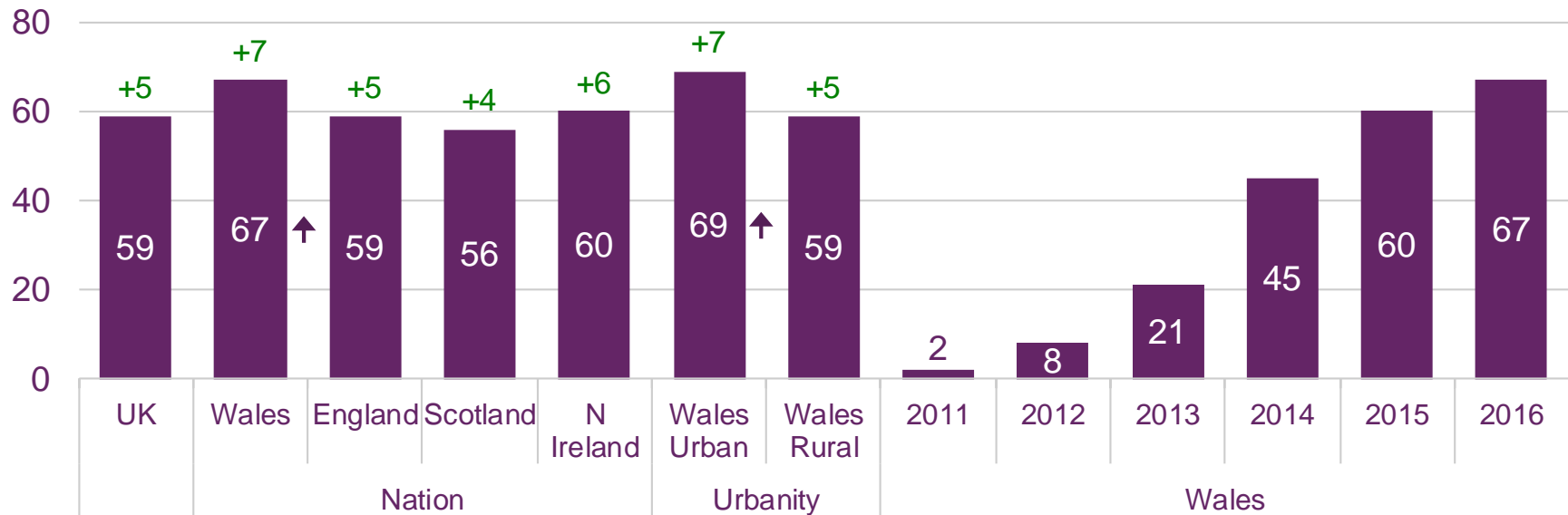
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for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

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

Figure 5.3

Take-up of tablet computers in Wales

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



Source: Ofcom Technology Tracker, H1 2016

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

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

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

Figure 5.4

Most important device for accessing the internet in Wales

Individuals (%)



Source: Ofcom Technology Tracker, H1 2016

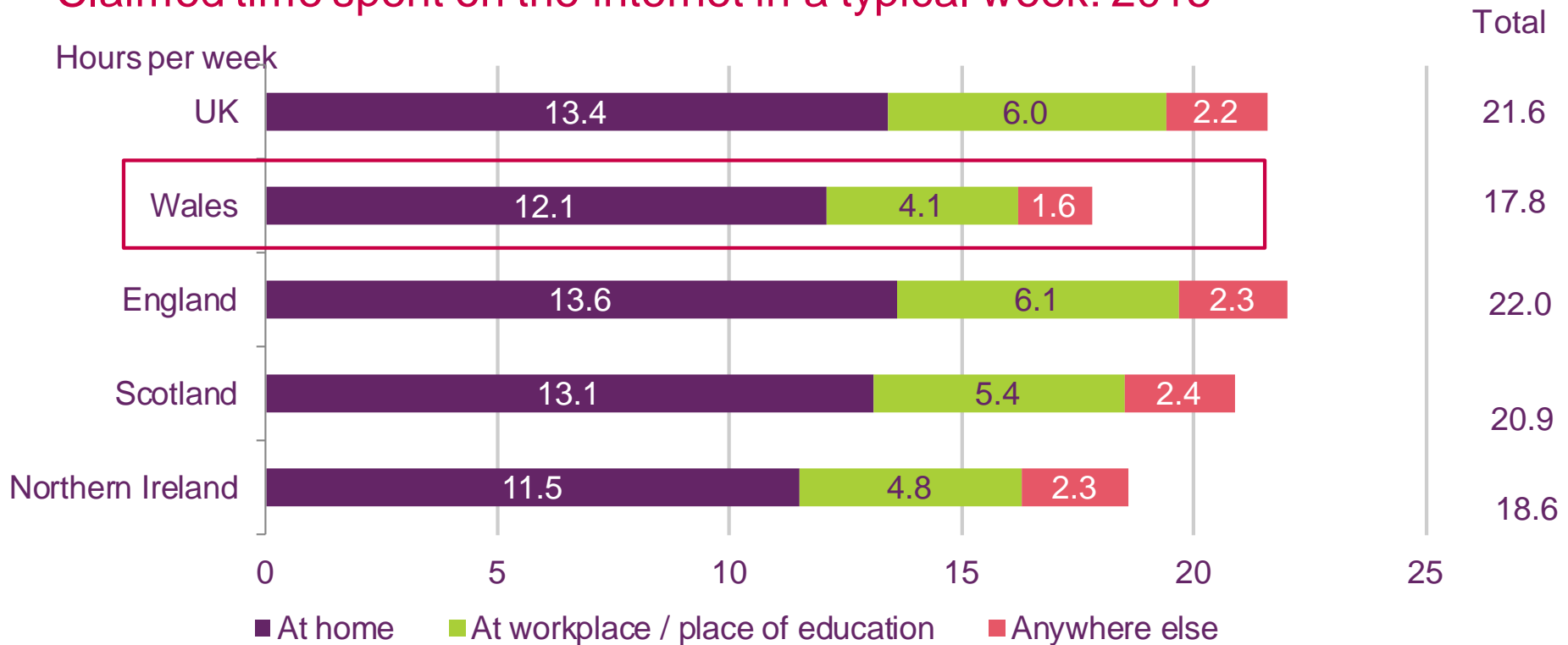
Base: Internet users aged 16+ (n = 3100 UK, 401 Wales, 199 Wales urban, 202 Wales rural, 130 16-34, 125 35-54, 146 55+, 234 ABC1, 166 C2DE, 99 under £17.5K, 101 £17.5K+).

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

QE40: Which is the most important device you use to connect to the internet, at home or elsewhere? 'Other' responses include: netbook, e-reader, TV set, games console, other portable/handheld device, smartwatch, other device, none and 'don't know'. * Caution: low base

Figure 5.5

Claimed time spent on the internet in a typical week: 2015



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

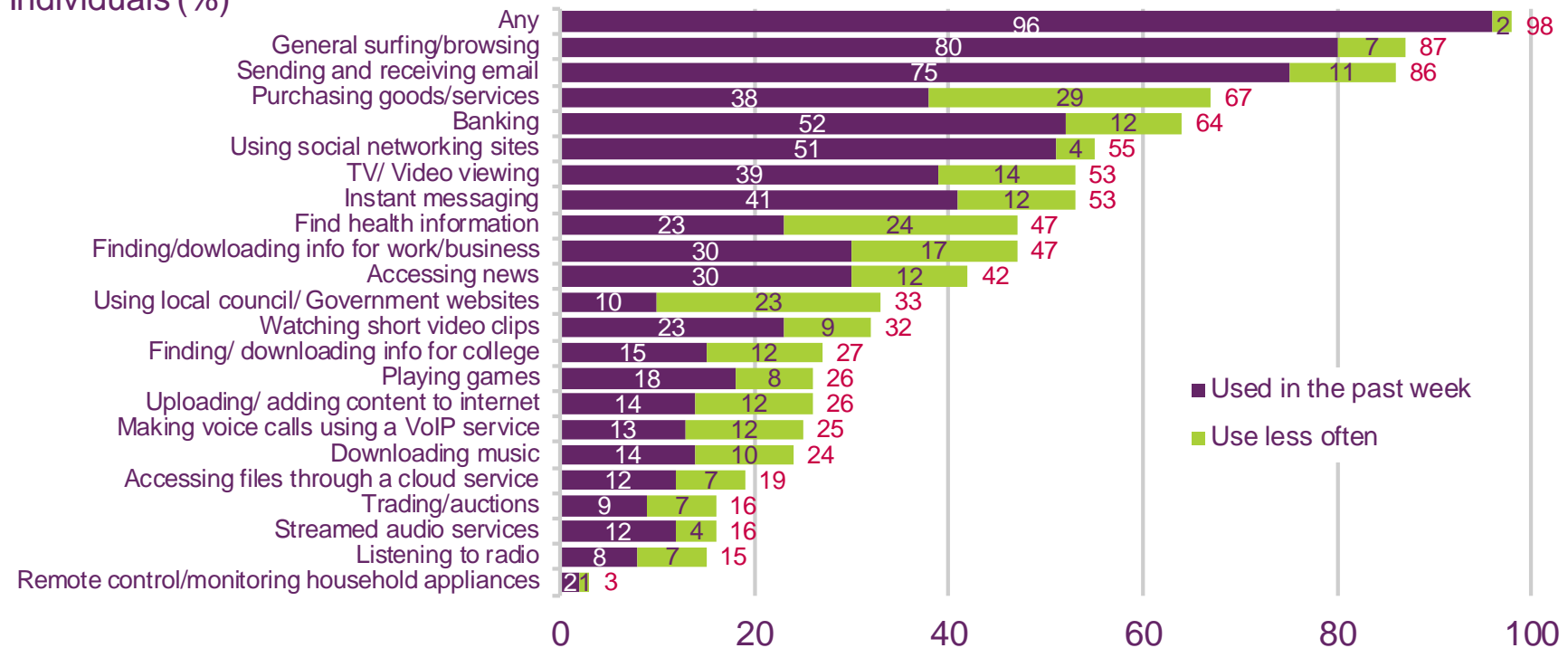
Base: All adults aged 16+ who use go online at home or elsewhere (1548 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

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

Figure 5.6

Activities carried out online by internet users in Wales

Individuals (%)



Source: Ofcom Technology Tracker, H1 2016

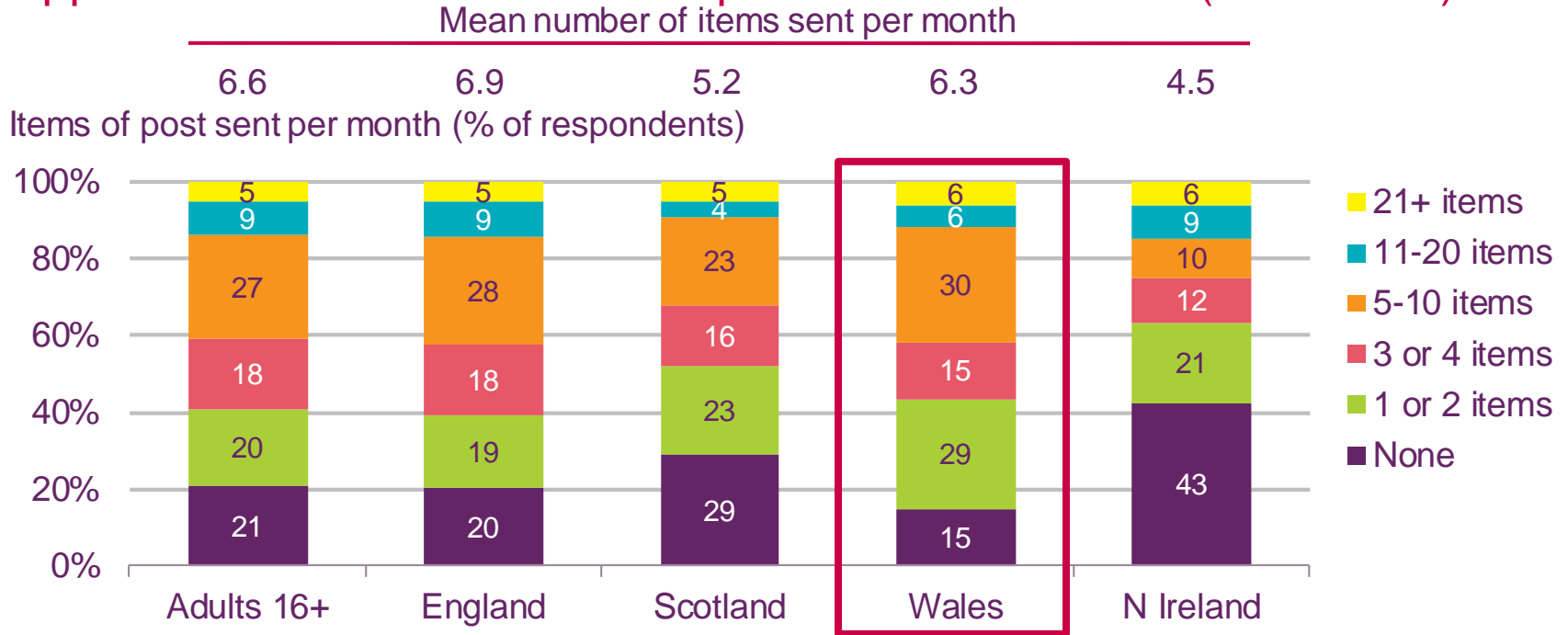
Base: Adults aged 16+ who use the internet at home or elsewhere (n= 401 Wales 2016)

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

6. Post

Figure 6.1

Approximate number of items of post sent each month (residential)



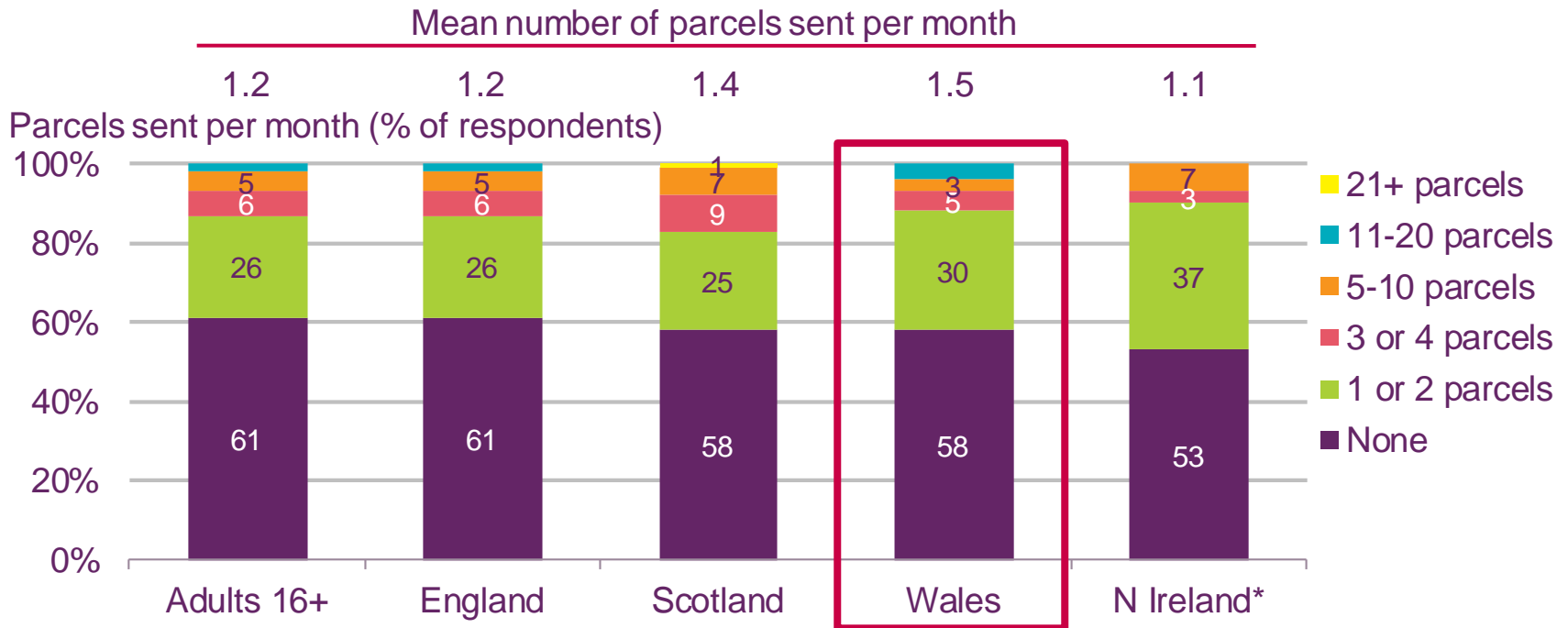
Source: Ofcom Residential Postal Tracker 2015

Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland)

QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?

Figure 6.2

Parcels sent in the past month



Source: Ofcom Residential Postal Tracker 2015

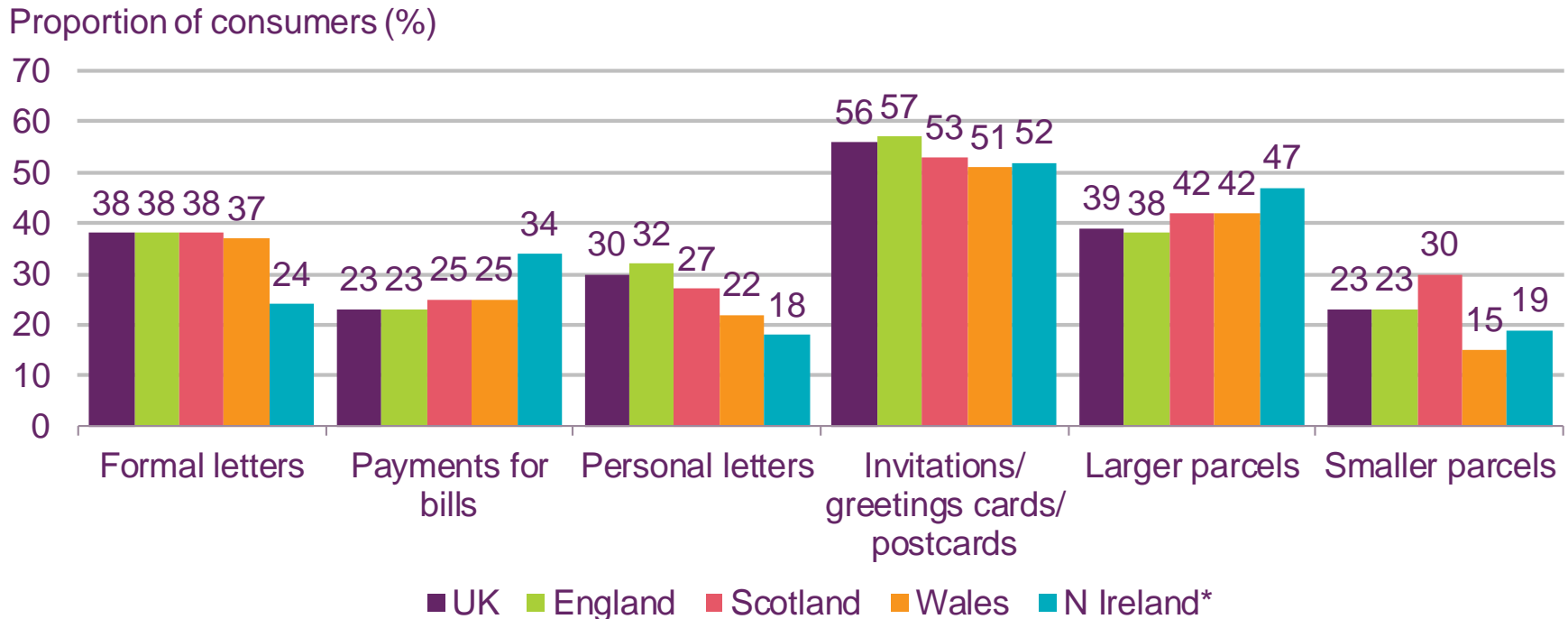
Base: All respondents who have personally sent an item of post in the last month (n = 1491 adults 16+, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

QC2. And how many of these items sent in the last month were parcels rather than letters or cards?

*Caution: Low base

Figure 6.3

Types of post sent in the past month



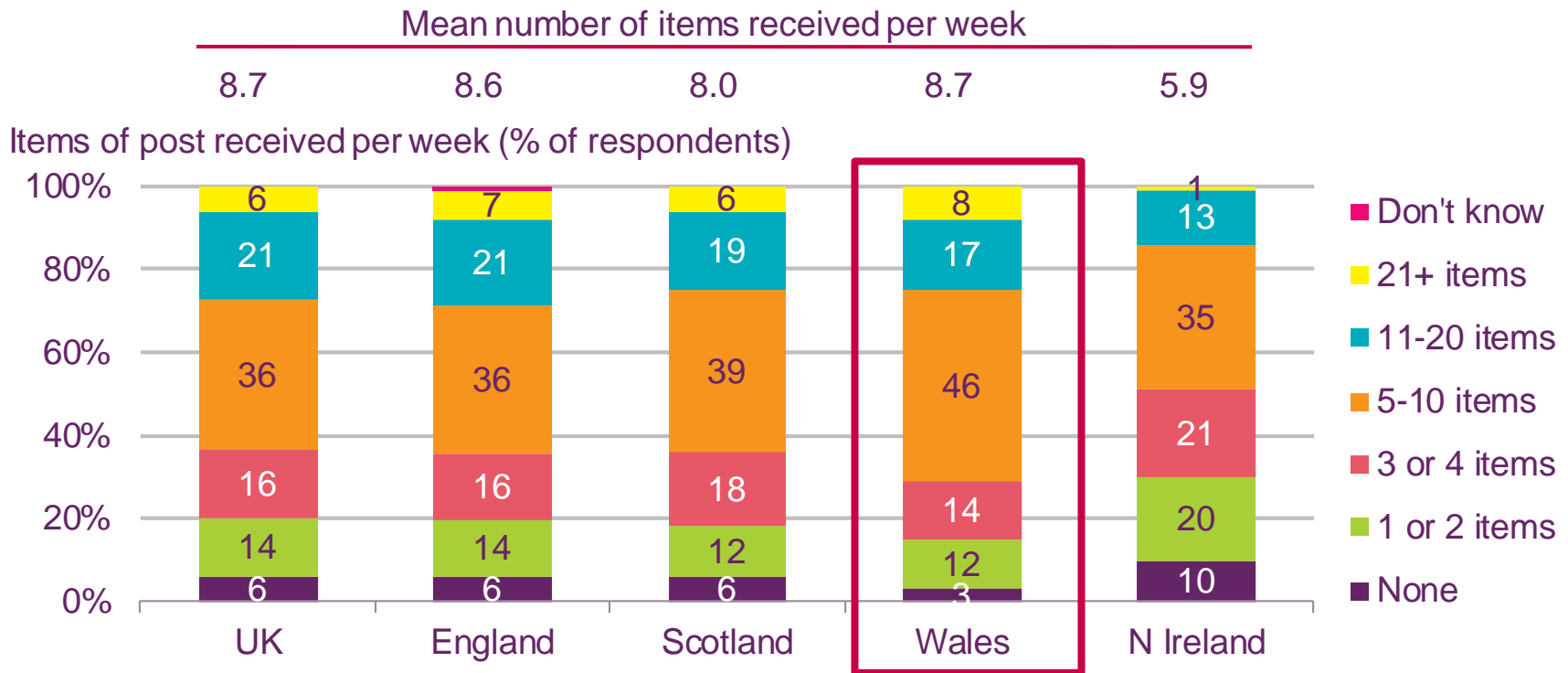
Source: Ofcom Residential Postal Tracker 2015

Base: All who have personally sent any items of post in the last week (n = 1491 UK, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

QC5. Which of these types of mail would you say you have personally sent in the last month by post? (MULTICODE) *Caution: Low base

Figure 6.4

Approximate number of items of post received in the past week

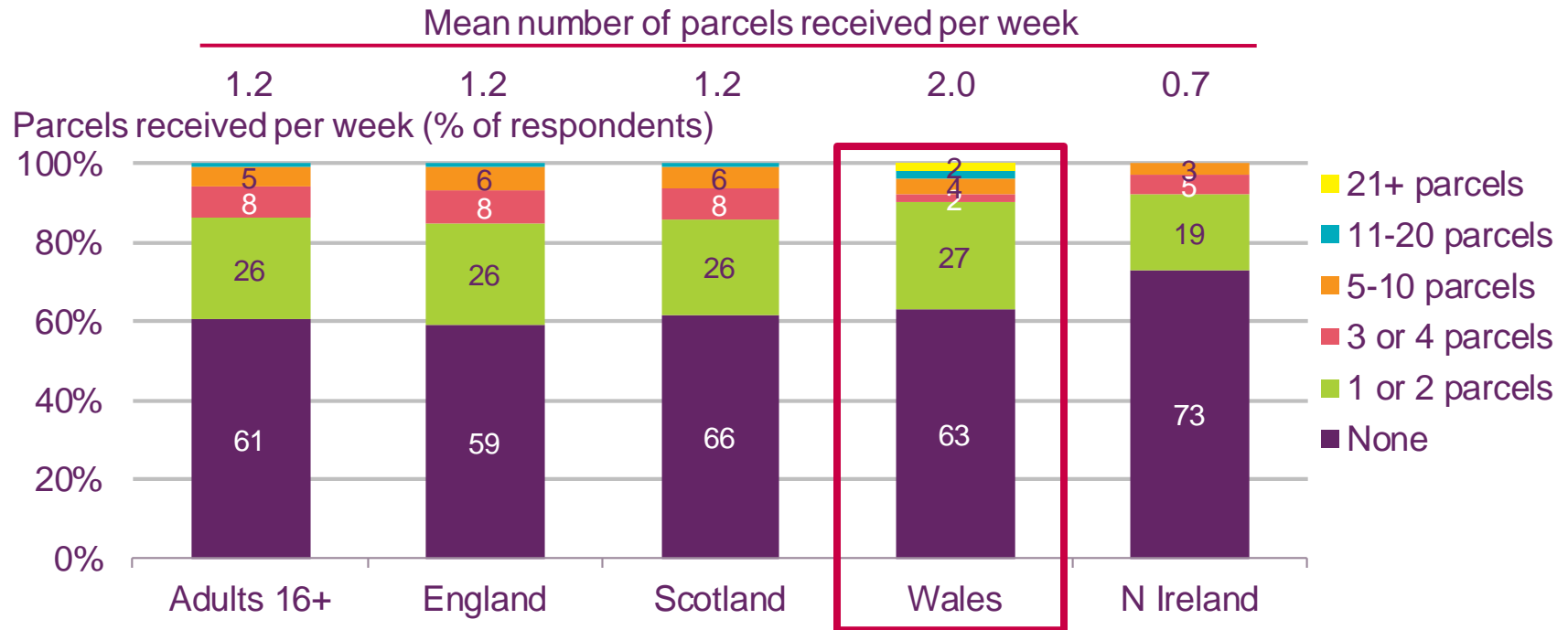


Source: Ofcom Residential Postal Tracker 2015

Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland) QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

Figure 6.5

Parcels received in the past week



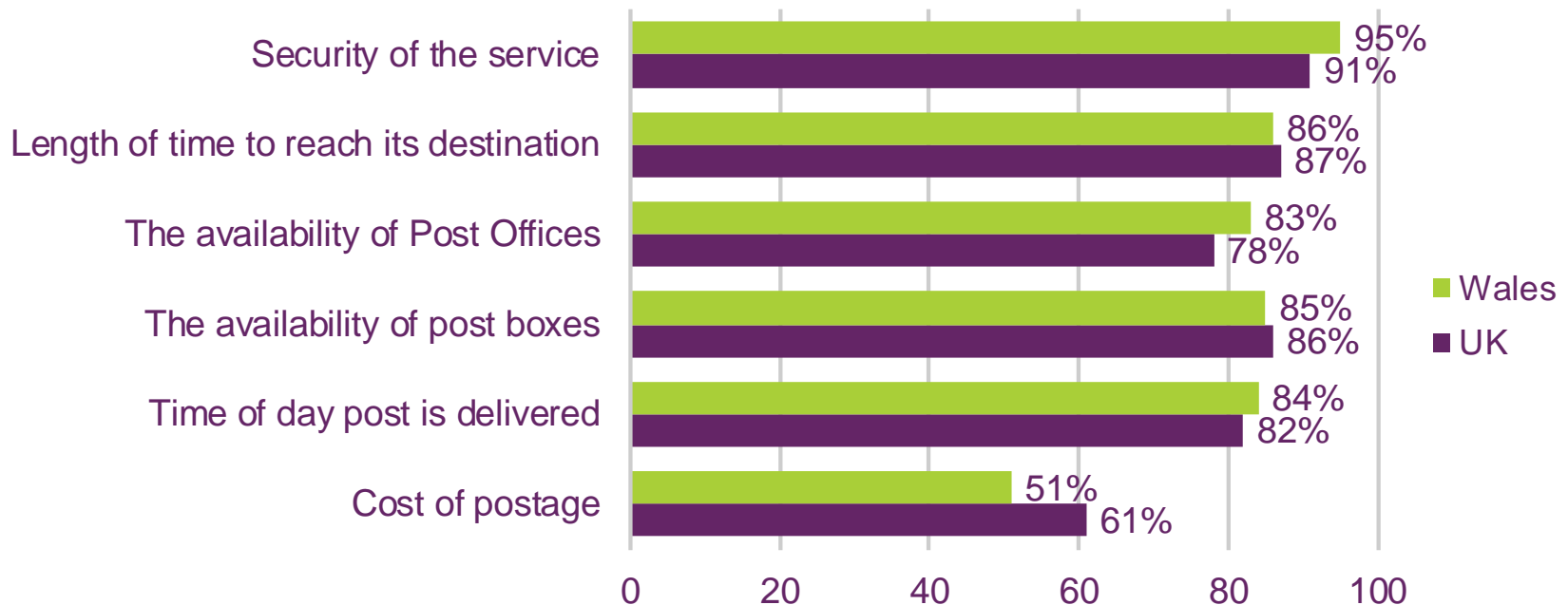
Source: Ofcom Residential Postal Tracker 2015

Base: All respondents who have personally received any items of post in the last week (n = 1824 adults 16+, 1258 England, 203 Scotland, 147 Wales, 116 Northern Ireland)

QD2. And how many of these items received in the last week were parcels?

Figure 6.6

Satisfaction with specific aspects of Royal Mail's service



Source: Ofcom Residential Postal Tracker 2015

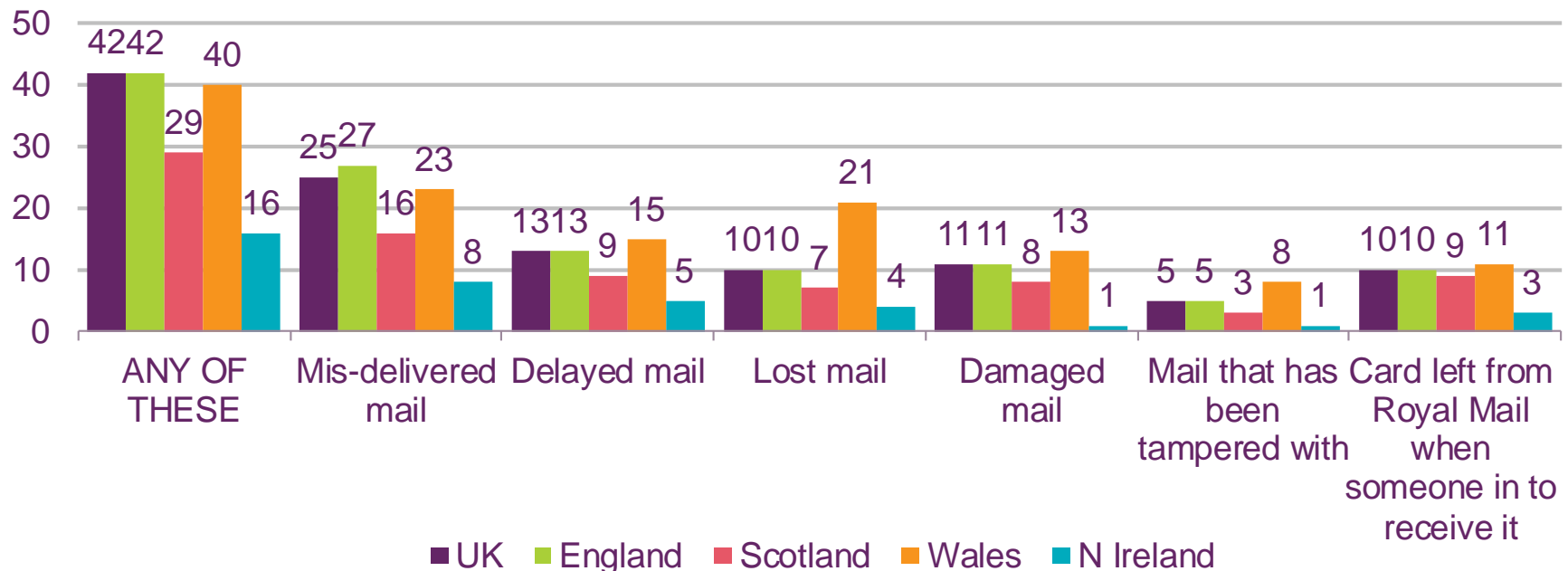
Base: All respondents in Wales (n = 1946 UK, 151 Wales)

QE3A-F. Satisfaction with specific aspects of Royal Mail's services – Ranked by proportion satisfied among adults in Wales

Figure 6.7

Problems experienced with Royal Mail in the past 12 months

Proportion of consumers (%)



Source: Ofcom Residential Postal Tracker 2015 Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland) QG1A-E. Problems experienced with Royal Mail service in the last 12 months – Ranked by proportion among all UK adults

Figure 6.8

Average volume of letters sent each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker 2015

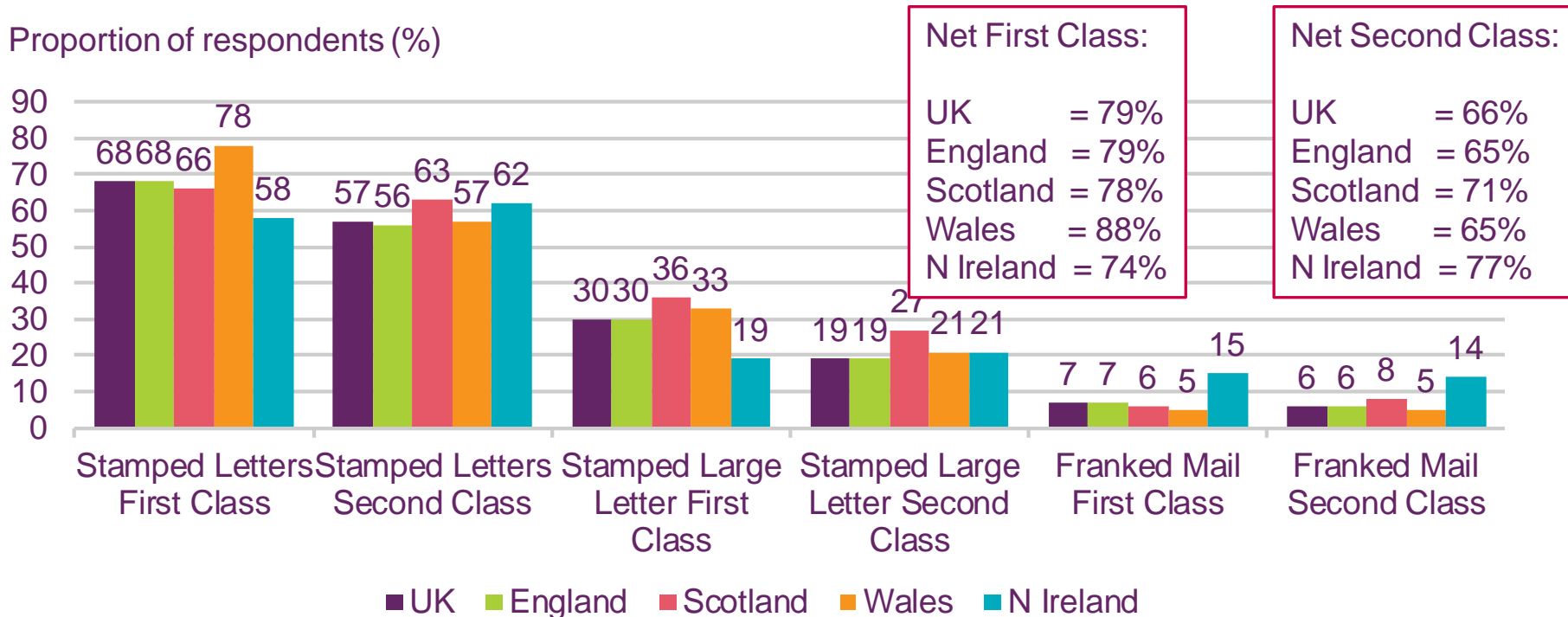
Base : All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)

QV2a. On average, how many letter items does your organisation send per month? Please think ONLY about all the letters and large letters you may send as an organisation.

Figure 6.9

Royal Mail services used to send standard post each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker 2015

Base : All respondents using RM standard delivery services (n = 1121 UK, 686 England, 146 Scotland, 155 Wales, 134 N Ireland) QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

Figure 6.10

Switched some mail to other communication methods over last twelve months

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker 2015

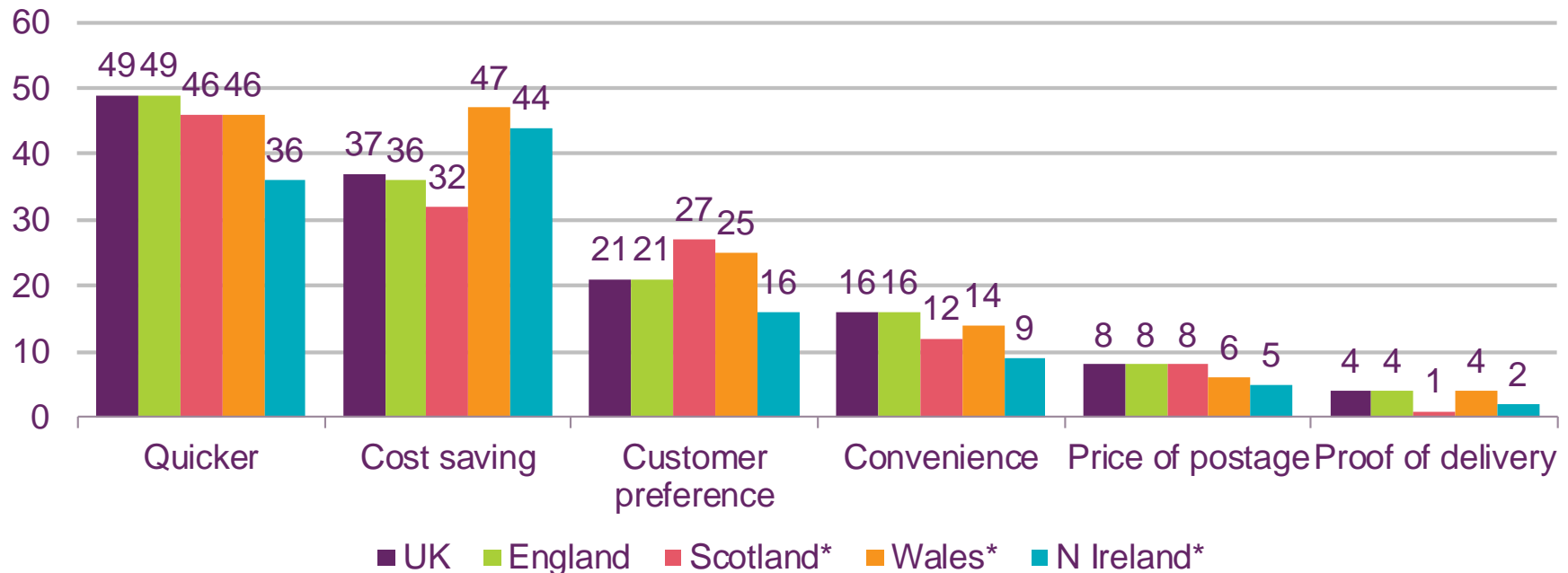
Base: All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)

QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

Figure 6.11

Main reasons for switching some mail to other communications methods over past 12 months

Proportion of respondents (%)

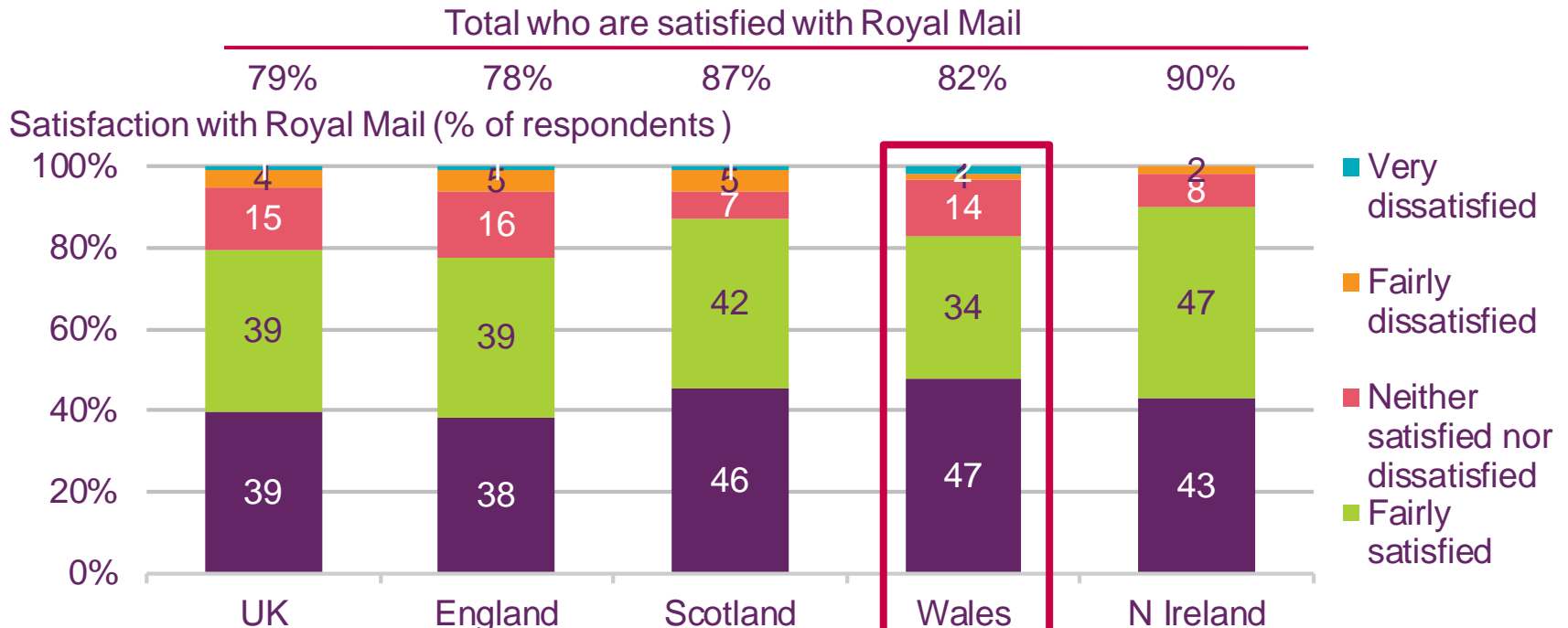


Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015 Base: All who have moved to other communication methods (n = 720 UK, 452 England, 80 Scotland, 94 Wales, 94 N Ireland) QF6: Why have you moved some mail to other communication methods? OPEN ENDED Top 6 reasons shown

*Caution: Low base

Figure 6.12

Overall satisfaction with the quality of service from Royal Mail

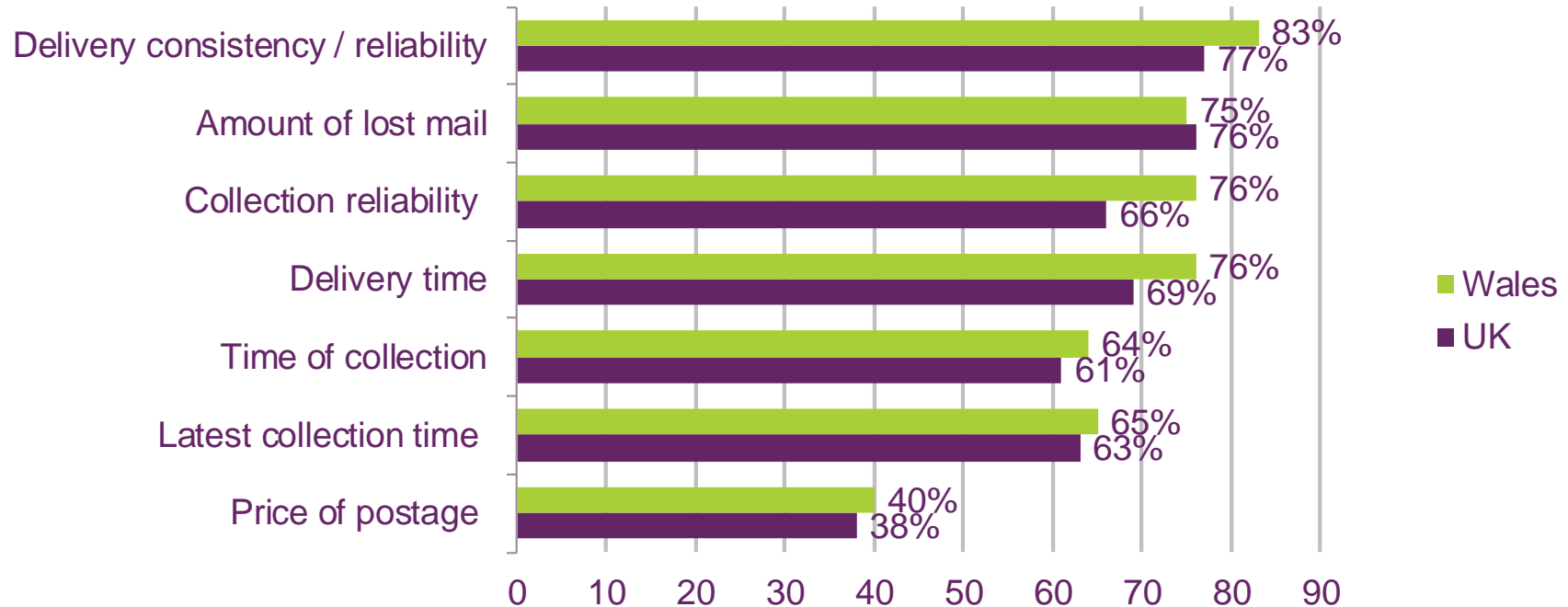


Source: Ofcom Business Postal Tracker 2015 Base: All respondents who use Royal Mail (n = 1185 UK, 727 England, 155 Scotland, 164 Wales, 139 Northern Ireland) QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

Figure 6.13

Satisfaction with specific aspects of Royal Mail's service

Satisfaction with Royal Mail (% of respondents)



Source: Ofcom Business Postal Tracker 2015

Base: All respondents who use Royal Mail (n = 1185 UK, 151 Wales) QRM3: How would you rate the performance of Royal Mail, as a recipient and sender, in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?