

Extended chart pack

# Wales – The Communications Market Report 2015

6<sup>th</sup> August 2014

# Wales' communications market

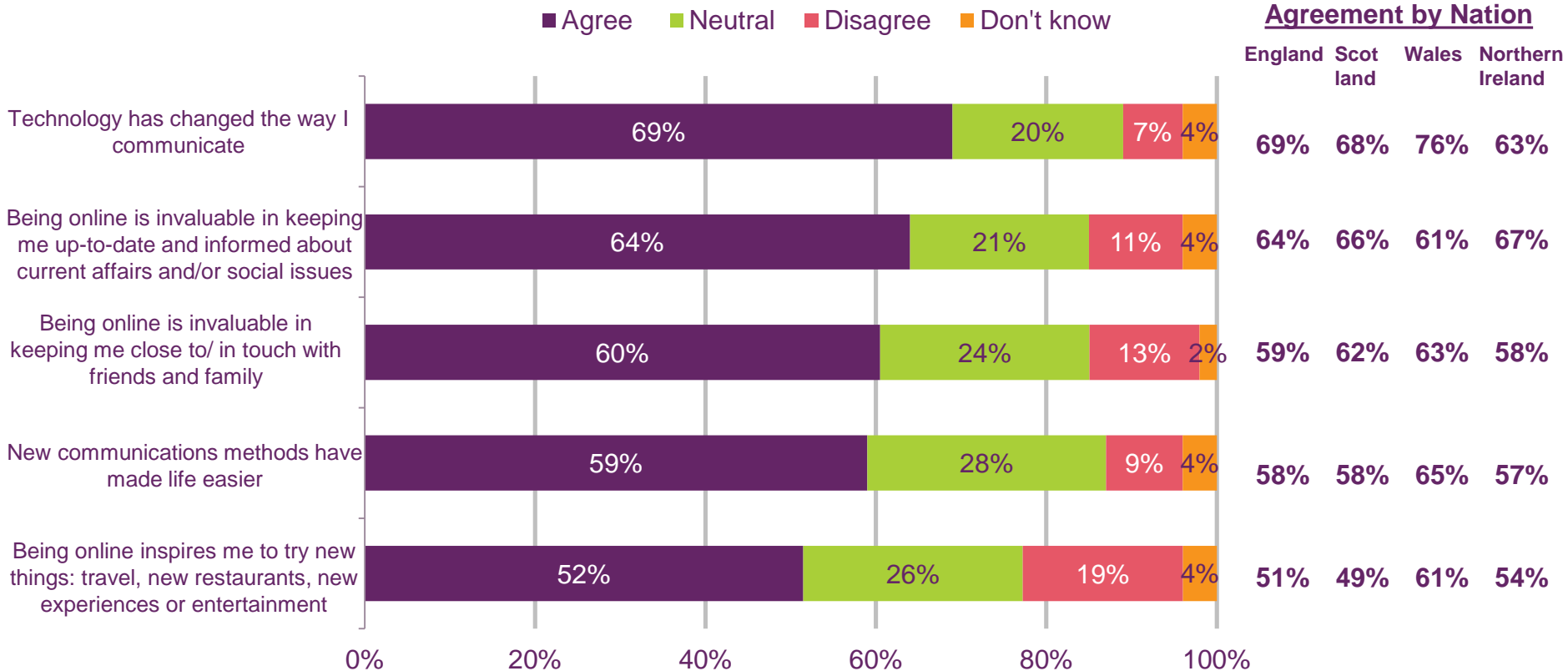
## Key facts about Wales

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

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

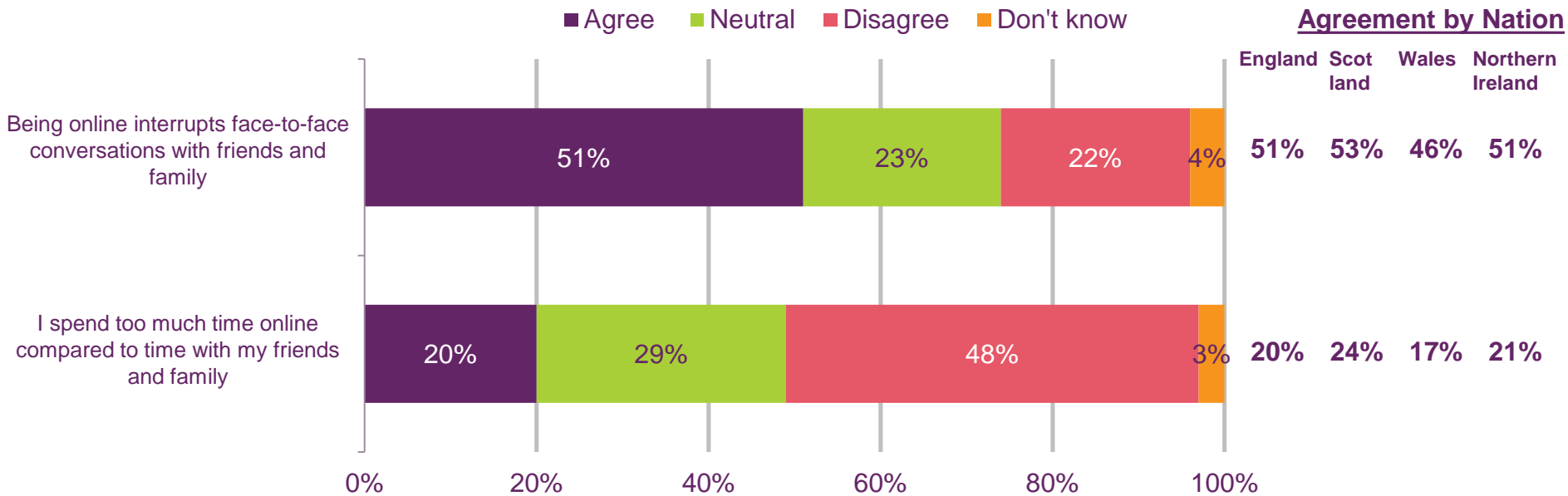


Source: Ofcom research, 'Connected Devices', May 2015

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?

# Level of agreement with negative statements about online communications, by nation



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

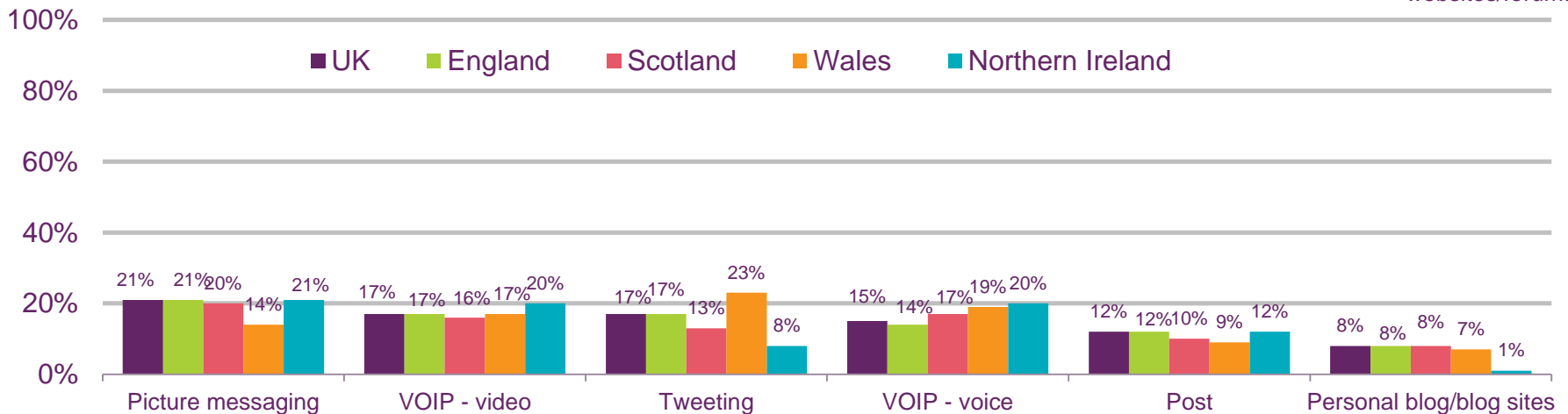
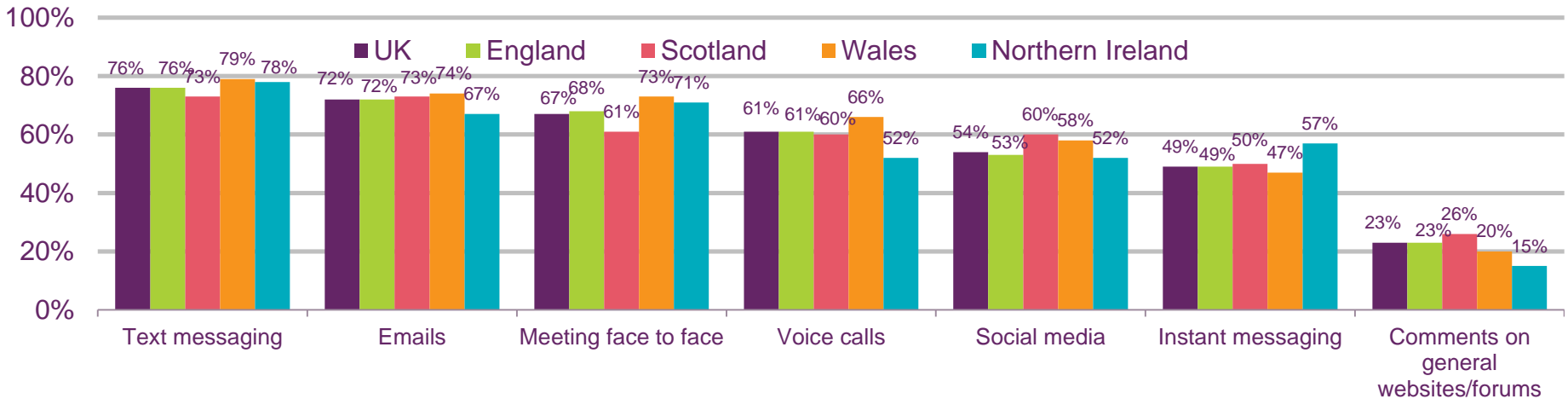
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

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

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



Proportion of online respondents %



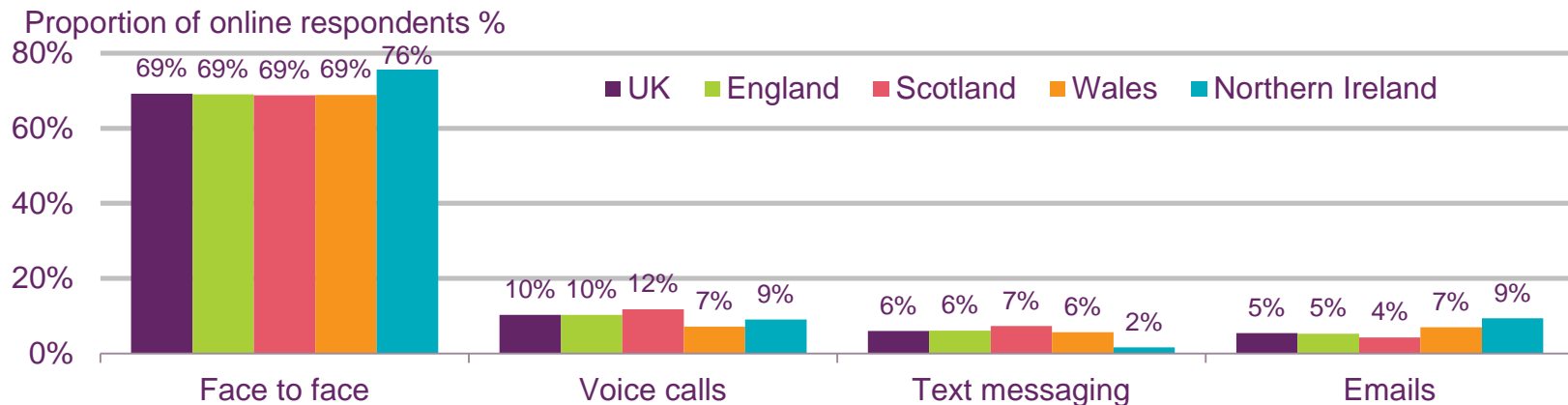
Source: Ofcom research, 'Connected Devices', May 2015

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

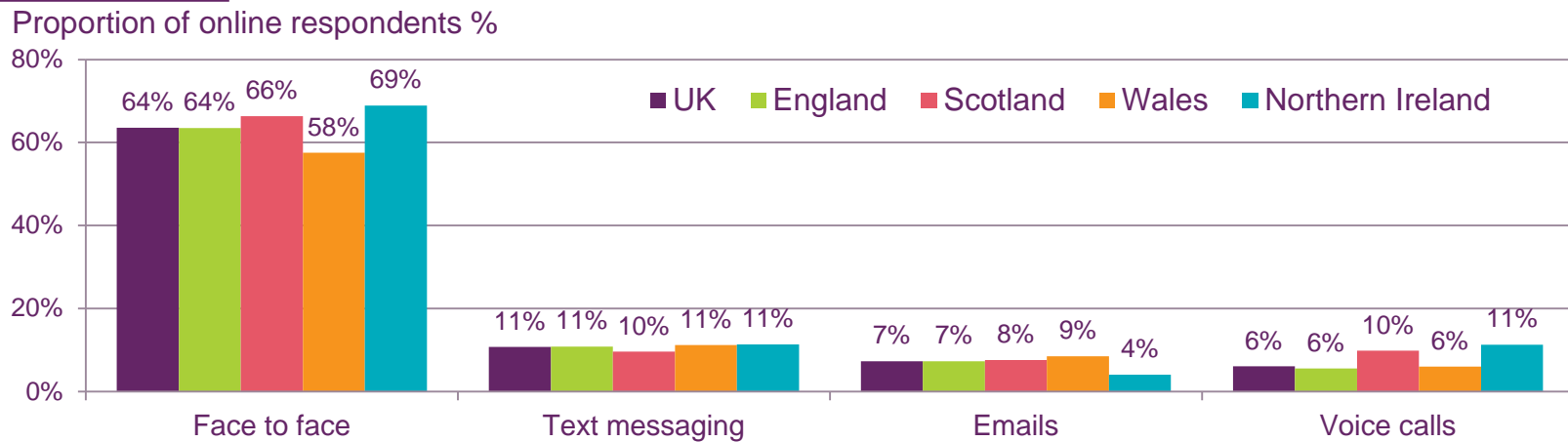
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

# 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 ..... ?

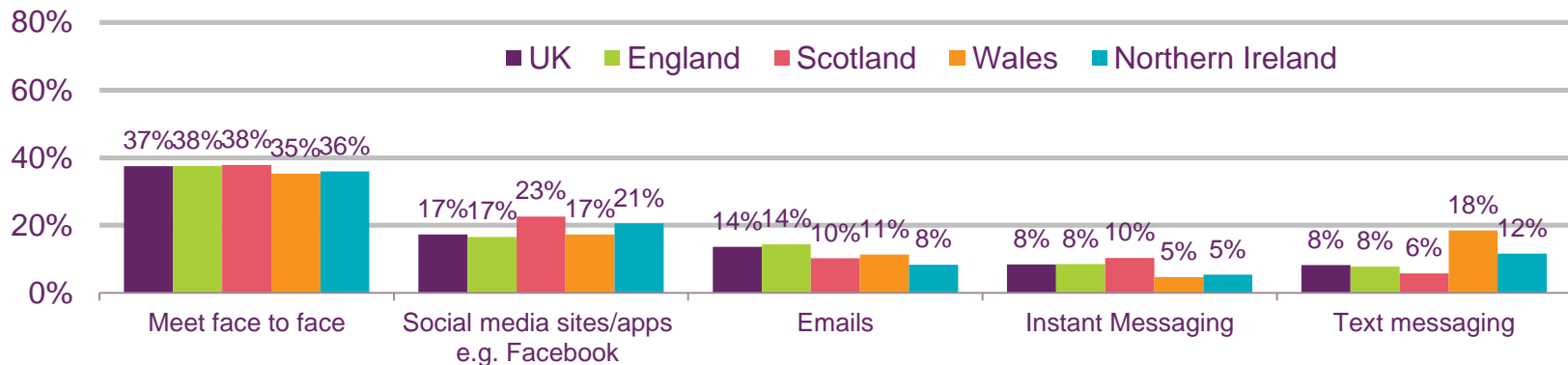
Chart includes data for all responses 5% or over.



# 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.

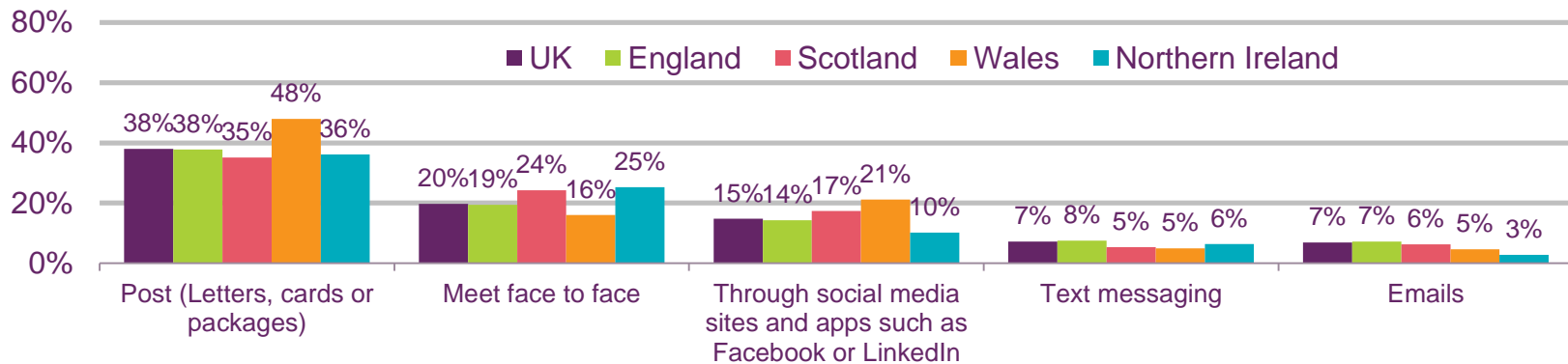
Q52. And which of these methods do you prefer to communicate with ..... ?

Chart includes data for all responses 5% or over.

# 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.

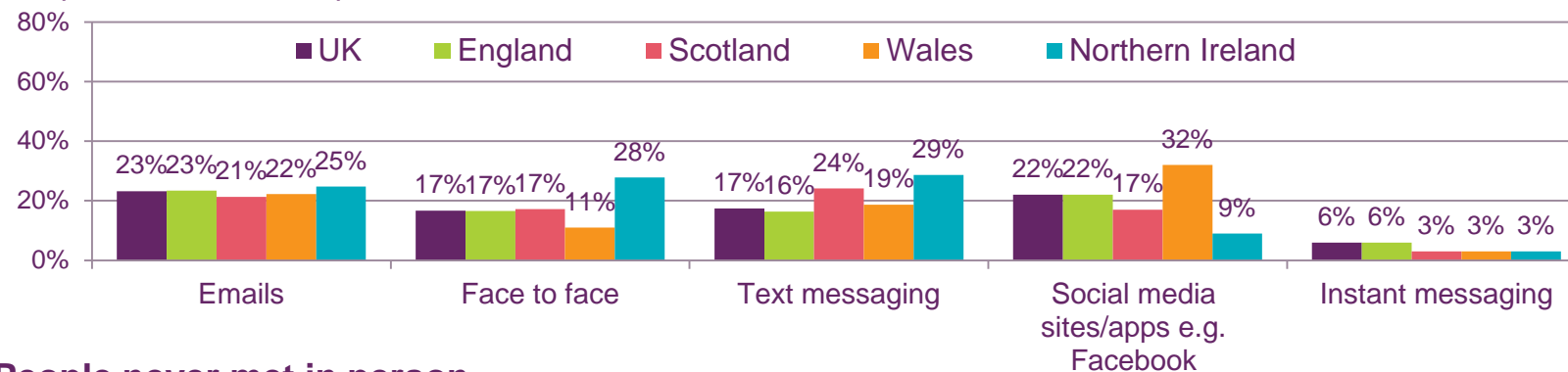
Q52. And which of these methods do you prefer to communicate for ..... ?

Chart includes data for all responses 5% or over.

# Preferred method of communicating with people less well known

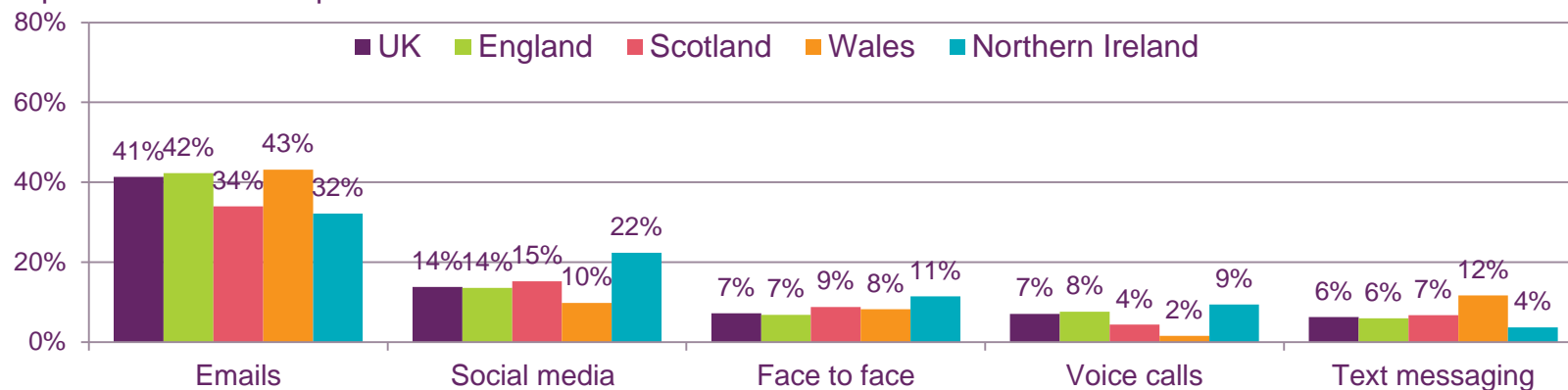
## Friend you don't know so well

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 ..... ?

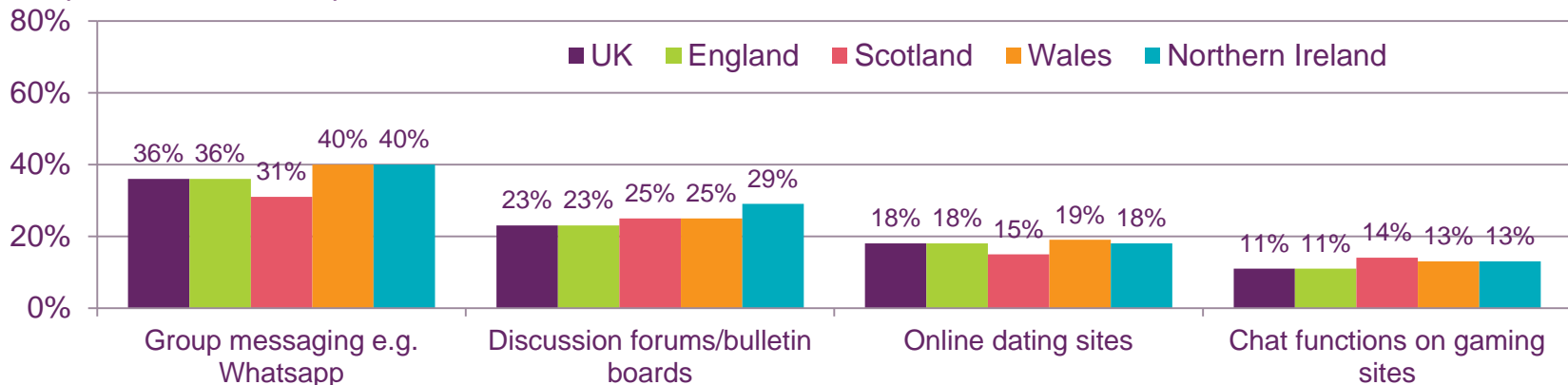
Chart includes data for all responses 5% or over.

# Use of different online activities to make new contacts



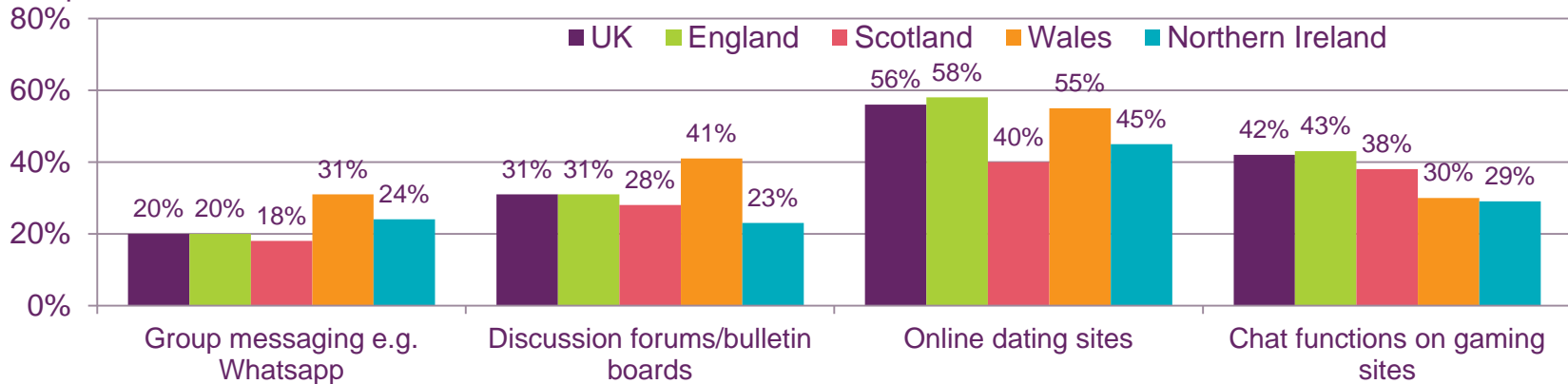
## Ever used the following types of websites

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+.

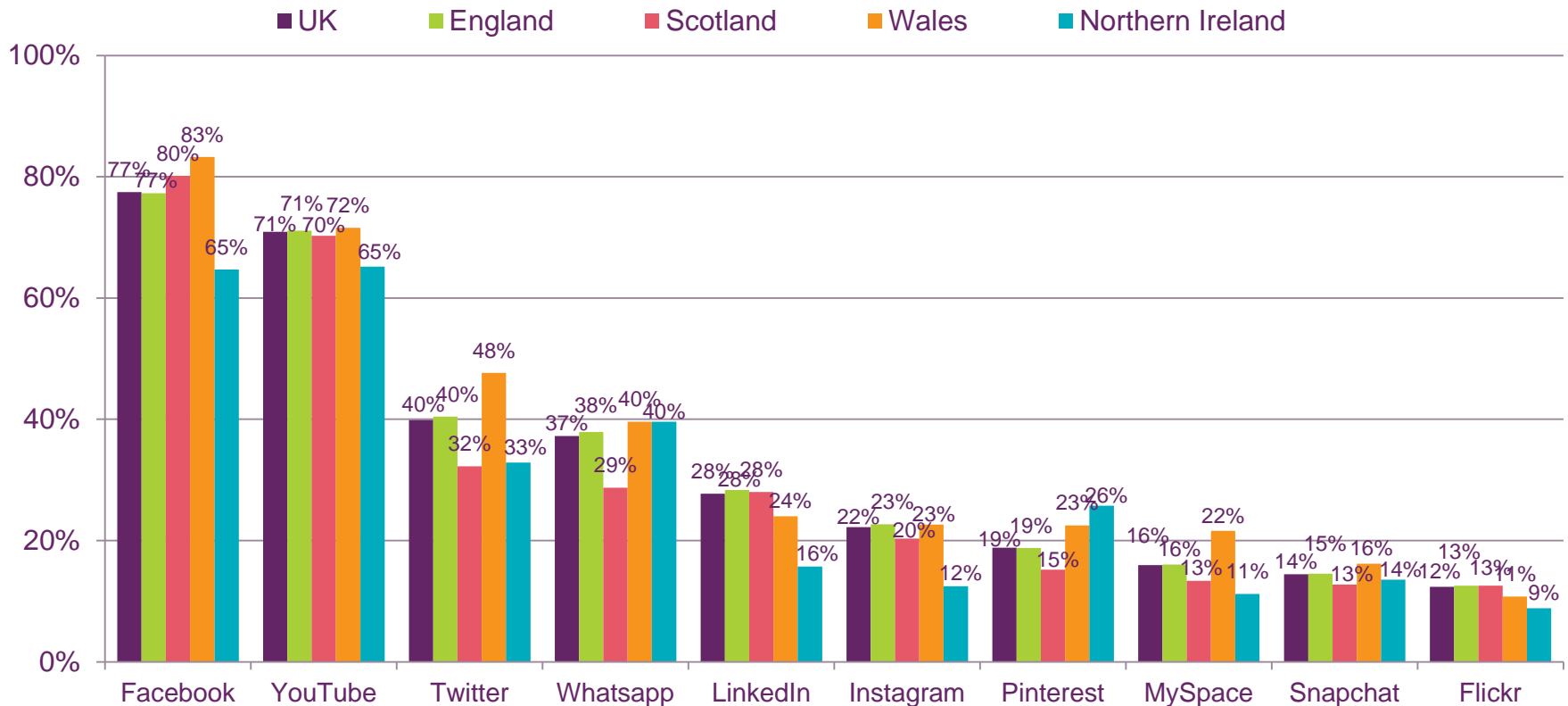
Q70. And have you ever used the following types of site ?

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

# Social networking

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

Proportion of online users (%)



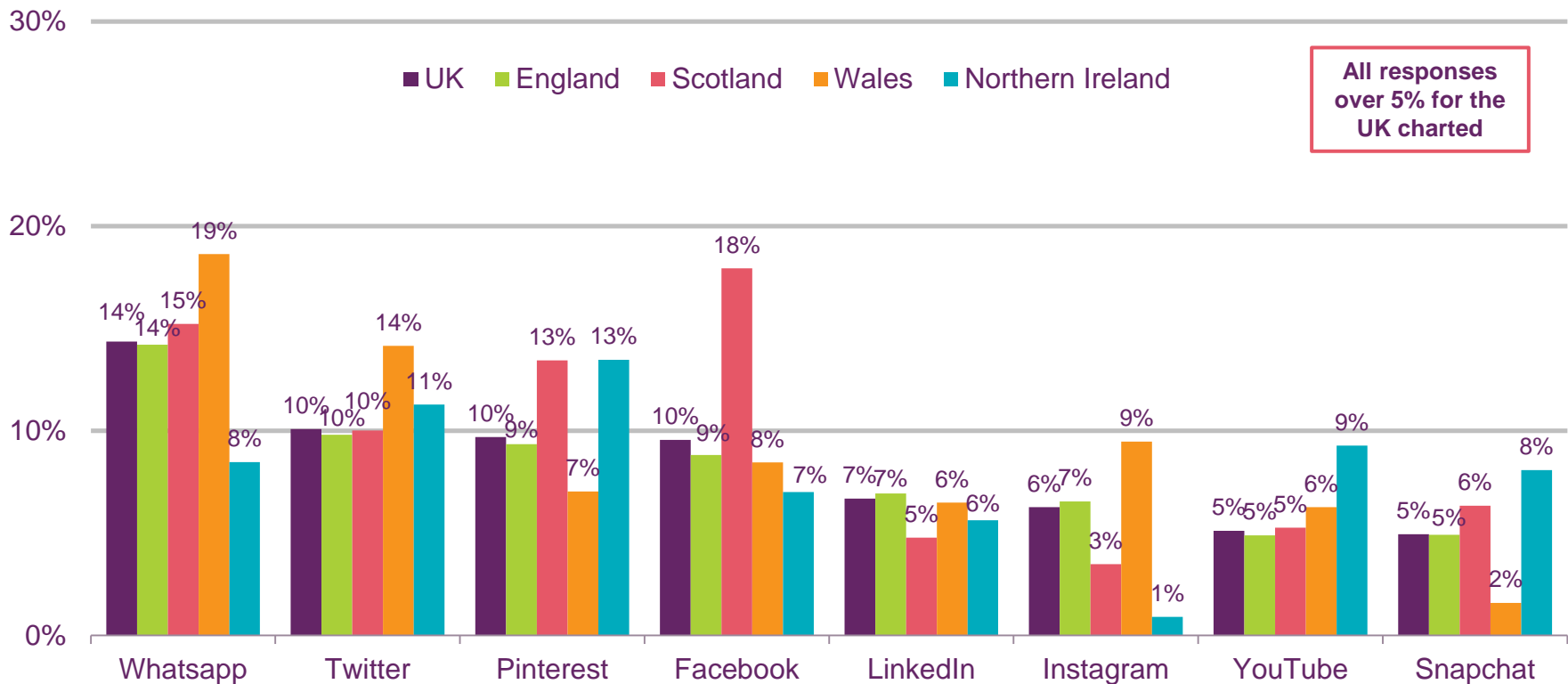
Source: Ofcom research, 'Connected Devices', May 2015

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)

# Site or app most recently added

Online website users (%)



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

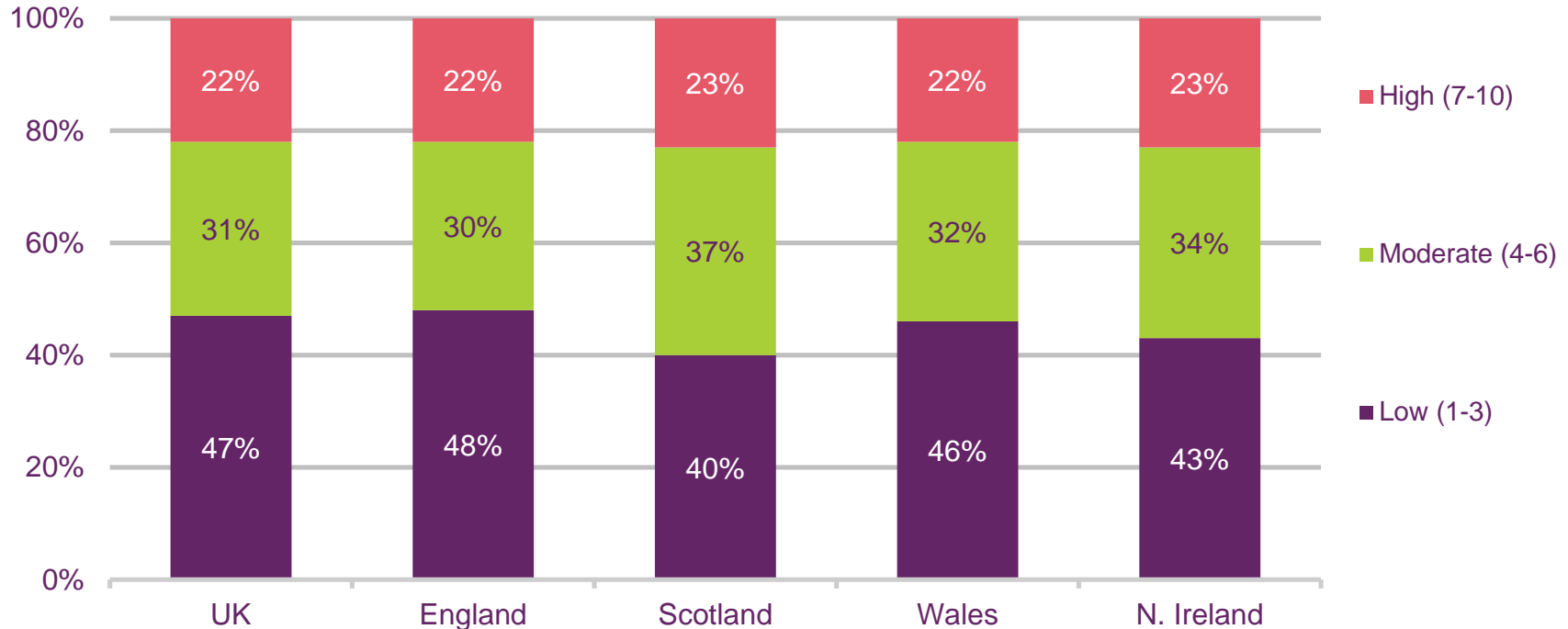
Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).

Q61d. Which one is your most recent addition?

Chart includes data for all responses 5% or over.

# Extent to which people are 'hooked' on social media, by nation

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).

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?

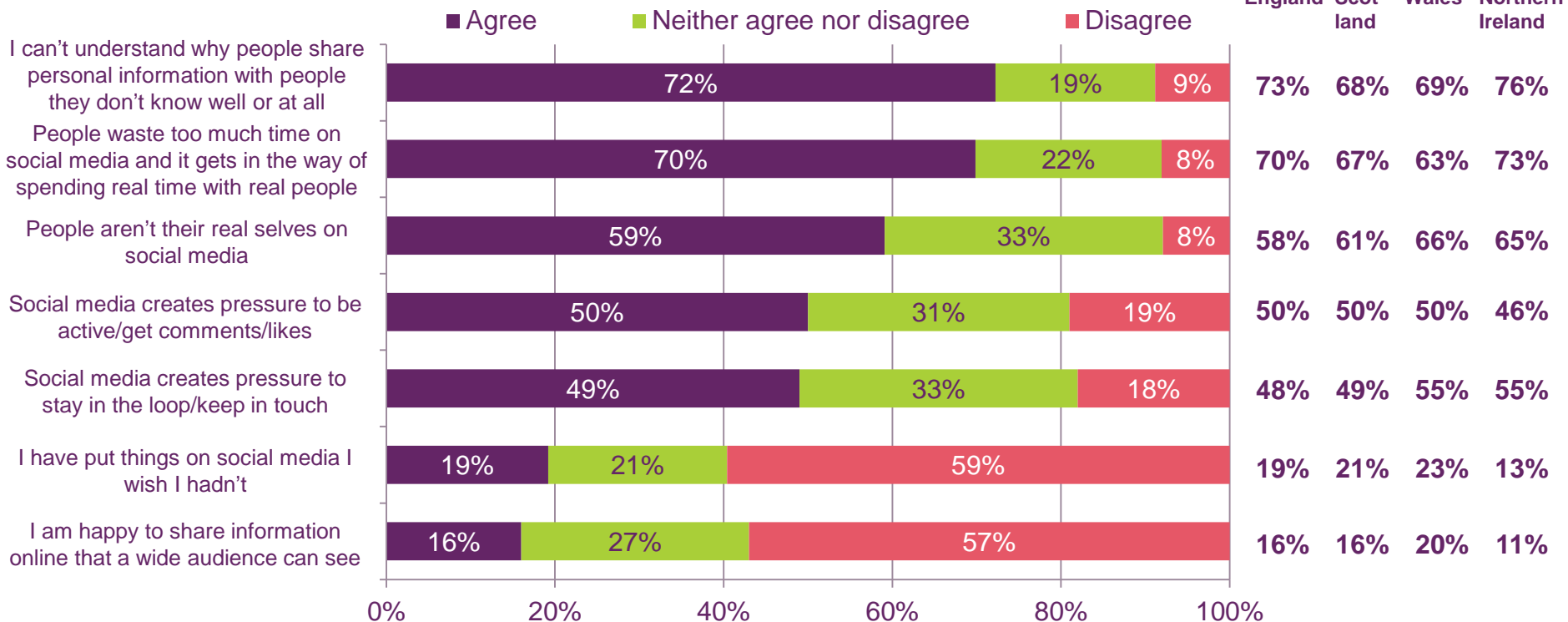


# Level of agreement with statements about social media

Proportion of online users (%)

Agreement by nation

England Scot land Wales Northern Ireland



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

Base: All online adults 16+ =2290

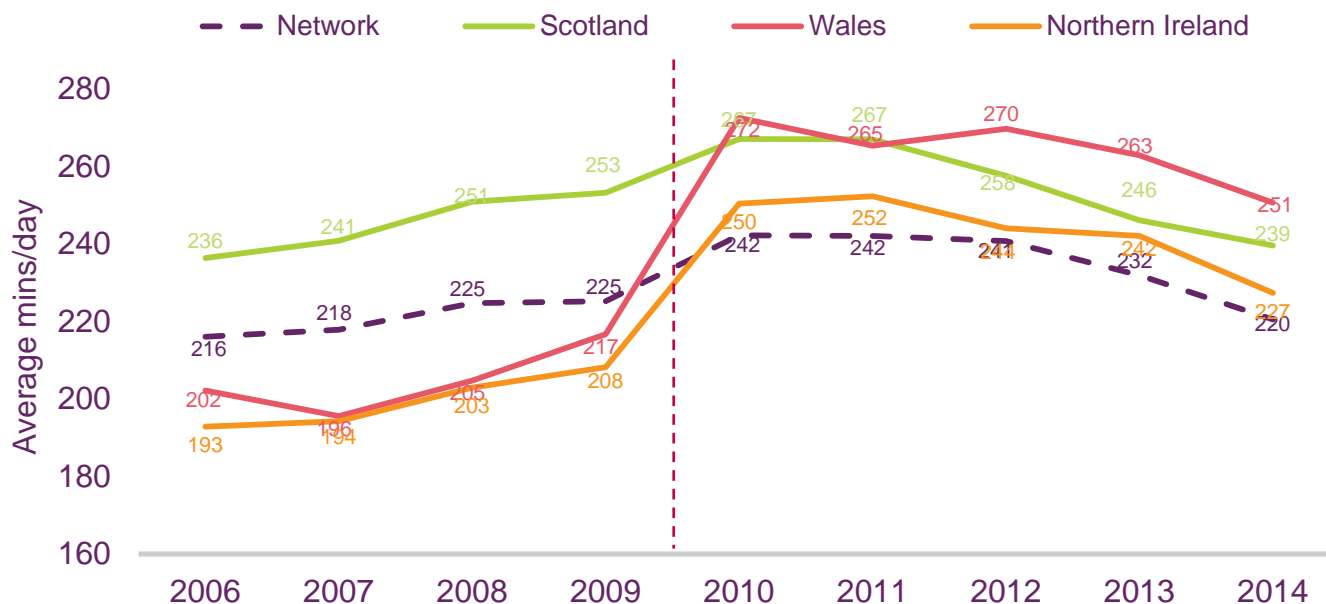
Q90 How much do you agree or disagree with the following statements regarding social media?

# Changes in audio-visual consumption in Wales

# Average minutes of television viewing per day, by nation: all homes



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

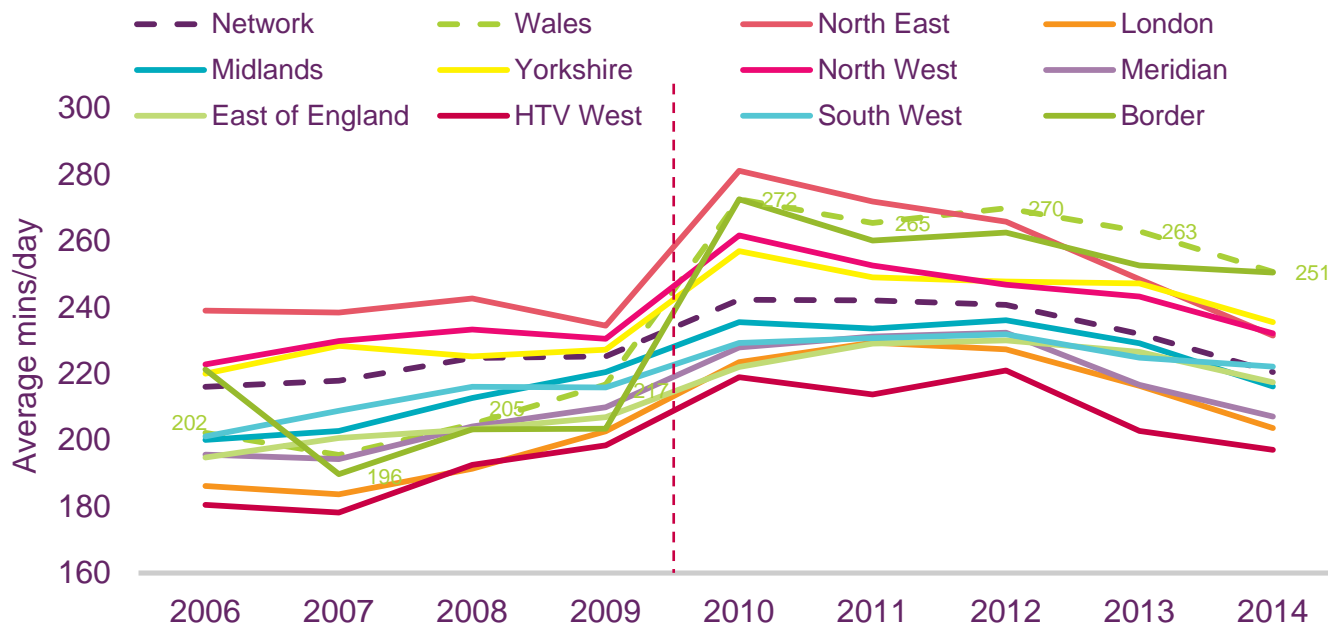


	% change: 2013-2014
Northern Ireland	-6.1%(-15min)
Wales	-4.7%(-12min)
Network	-4.9% (-11min)
Scotland	-2.7%(-7min)

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.

# Average minutes of television viewing per day, Wales vs English regions

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



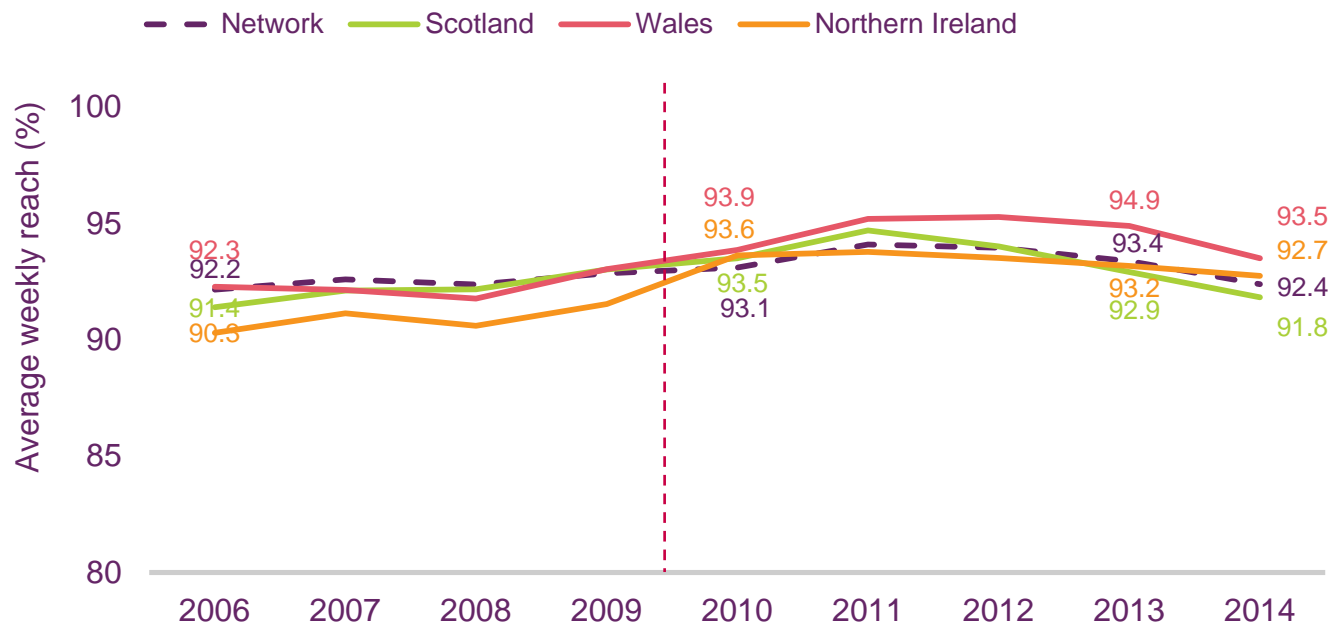
	% change: 2013-2014
North East	-7.0%(-17min)
London	-5.9%(-13min)
Wales	-4.7%(-12min)
Midlands	-5.7%(-13min)
Yorkshire	-4.7%(-12min)
Network	-4.9% (-11min)
North West	-4.6%(-11min)
Meridian	-4.4%(-10min)
East	-4.0%(-9min)
HTV West	-2.8%(-6min)
Border	-0.8%(-2min)

Source: BARB.

- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

# Average weekly reach of total TV, by nation

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

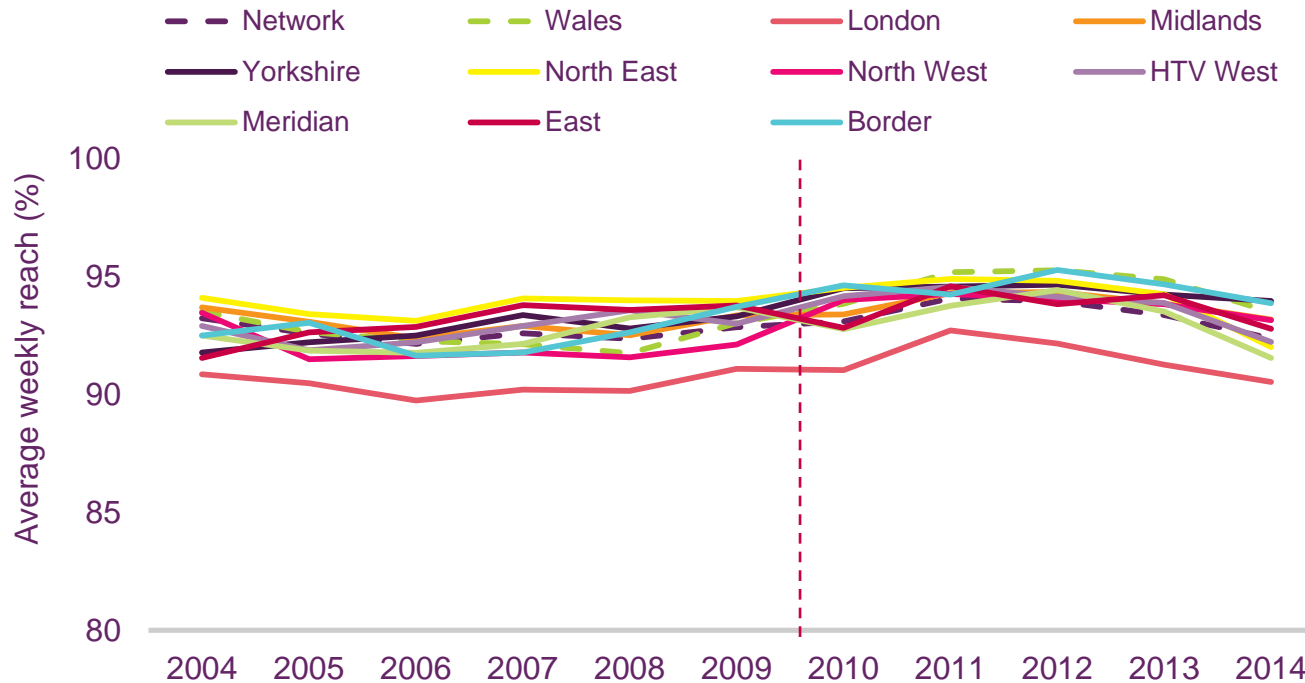


	Percentage point change: 2013-2014
Wales	-1.4
Scotland	-1.1
Network	-1.0
Northern Ireland	-0.4

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).

# Average weekly reach of total TV, Wales vs English regions

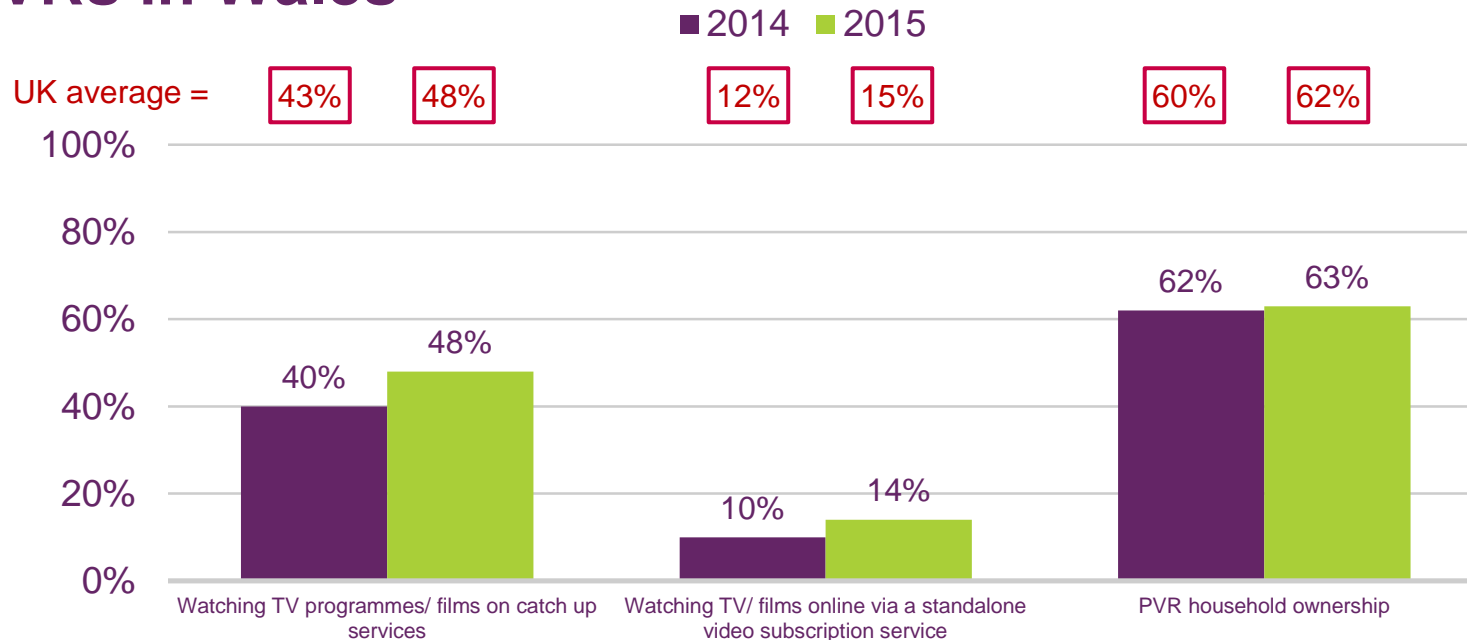
Average weekly reach by TV region: Total TV, Individuals 4+ (15 min+)



	Percentage point change: 2013-2014
North East	-2.2
Meridian	-2.0
HTV West	-1.7
North West	-1.7
Wales	-1.4
East	-1.4
Network	-1.0
Border	-0.8
London	-0.7
Midlands	-0.7
Yorkshire	-0.3

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

# 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?

# 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%

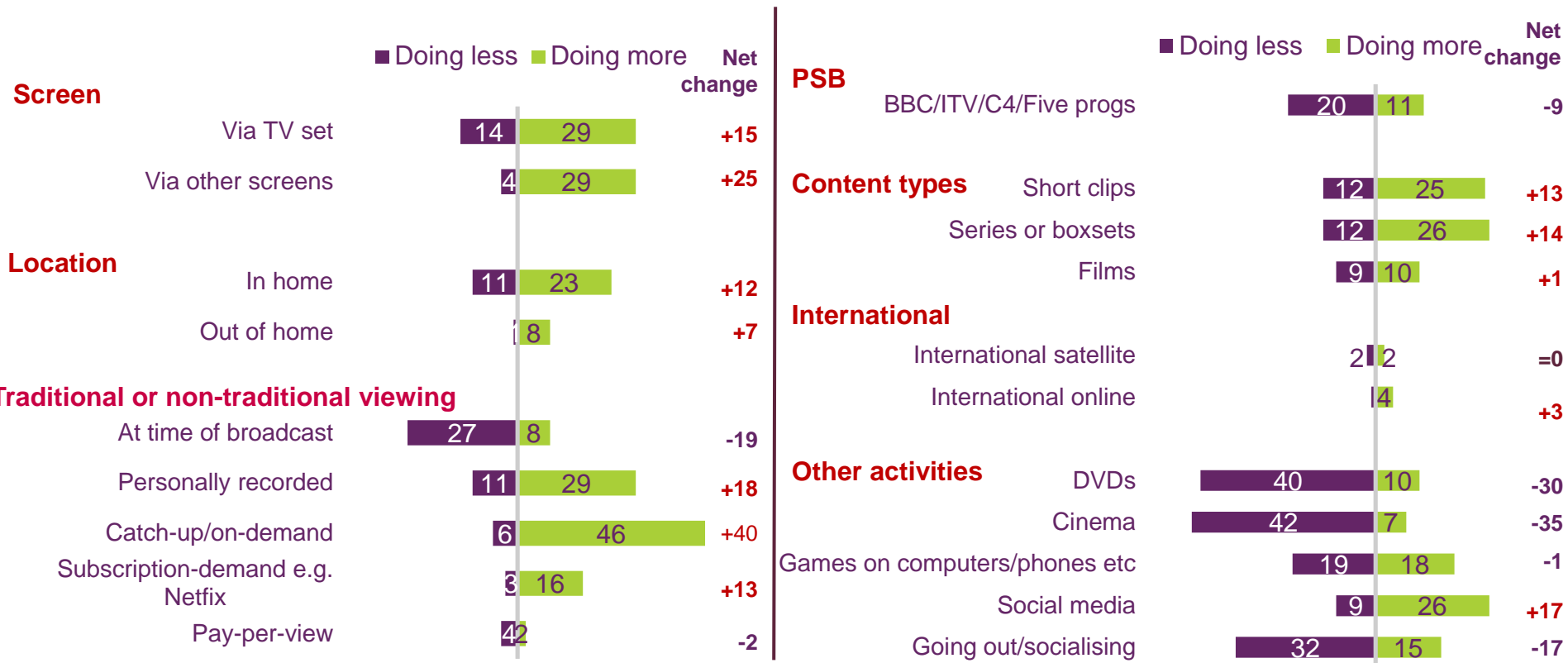
Source: GfK NOP omnibus, April 2015.

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.



# 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

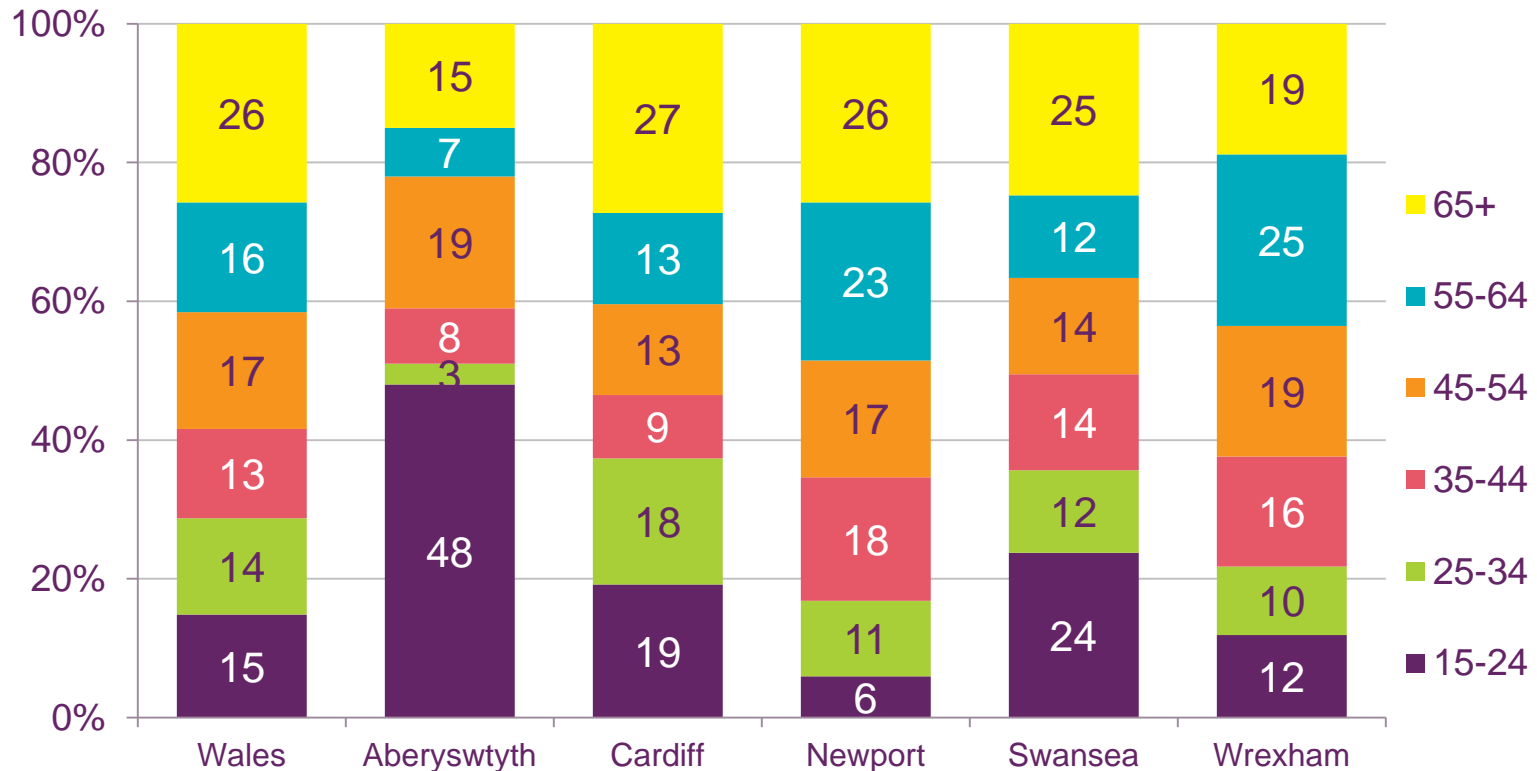
- Watching international channels via satellite services from other countries e.g. Hotbird, Turksat, Hellas Sat), Hispasat, Canal+, Cyfra.
- Watching programmes/films through international online video services from other countries, e.g. RTÉ Player, Hulu, My TF1, nc+

## 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**

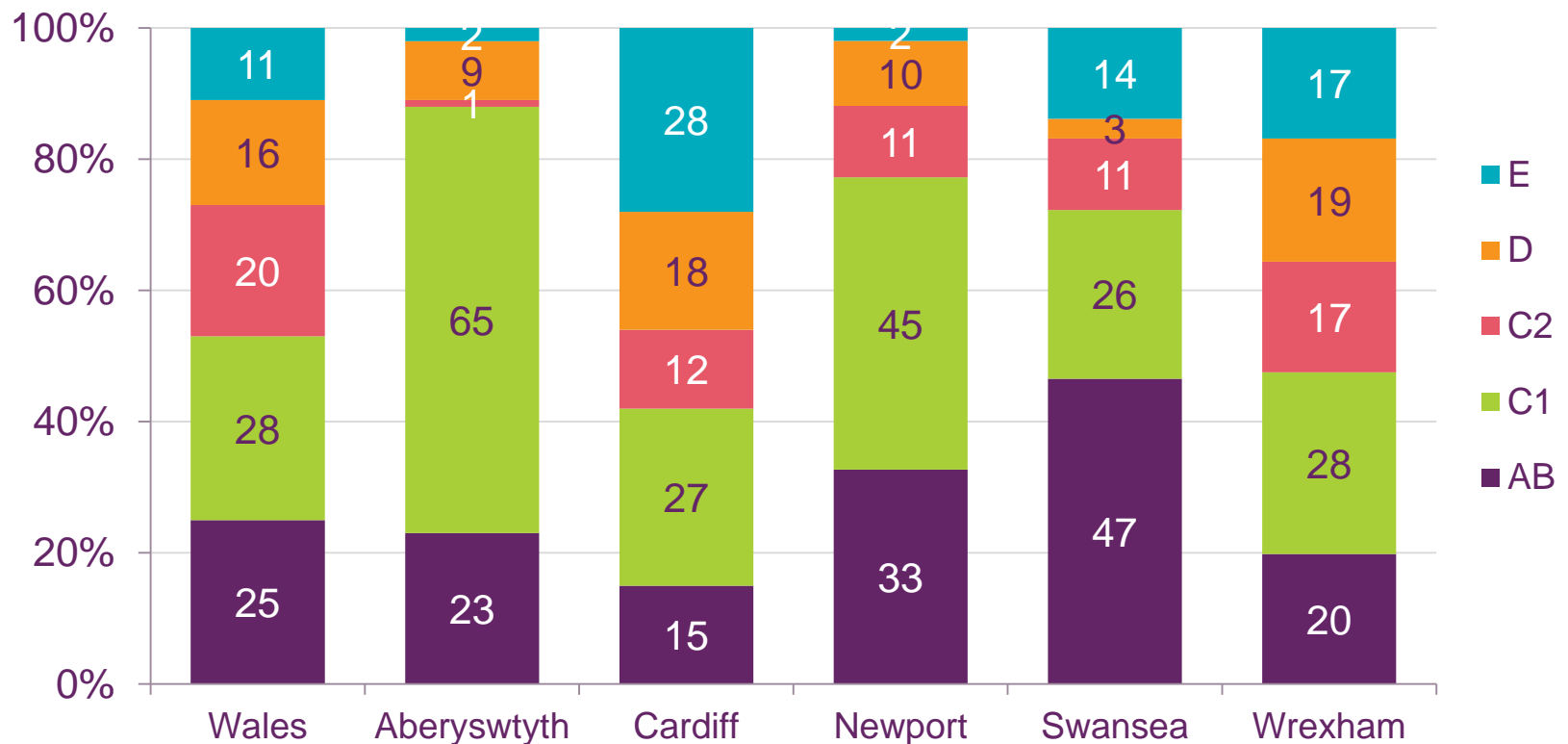
# Age profiles of Wales, Aberystwyth, Cardiff, Newport, Swansea and Wrexham



Source: British Population Survey

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

# 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)

## 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?

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



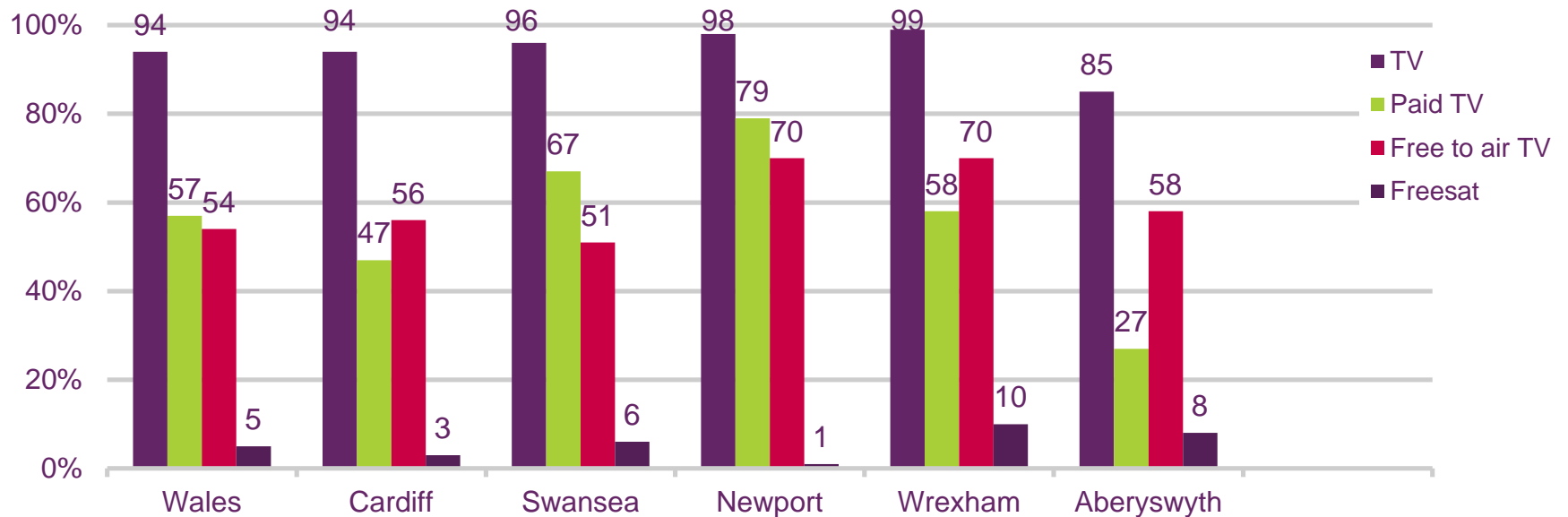
Source: British Population Survey

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?

## Take-up of TV services in Welsh towns and cities



Source: British Population Survey

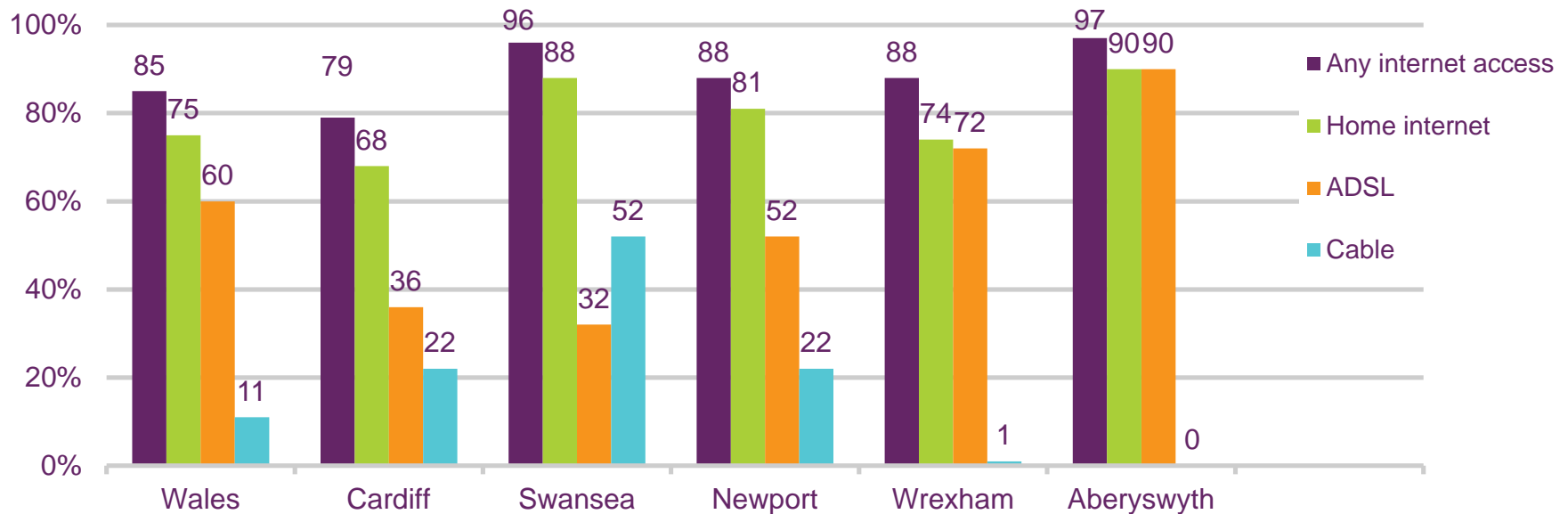
Base: All adults 15+ (Wales 5287, Aberystwyth, 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211 )

Q: Is there a TV in the household?

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



# Take-up of internet services in Welsh towns and cities



Source: British Population Survey

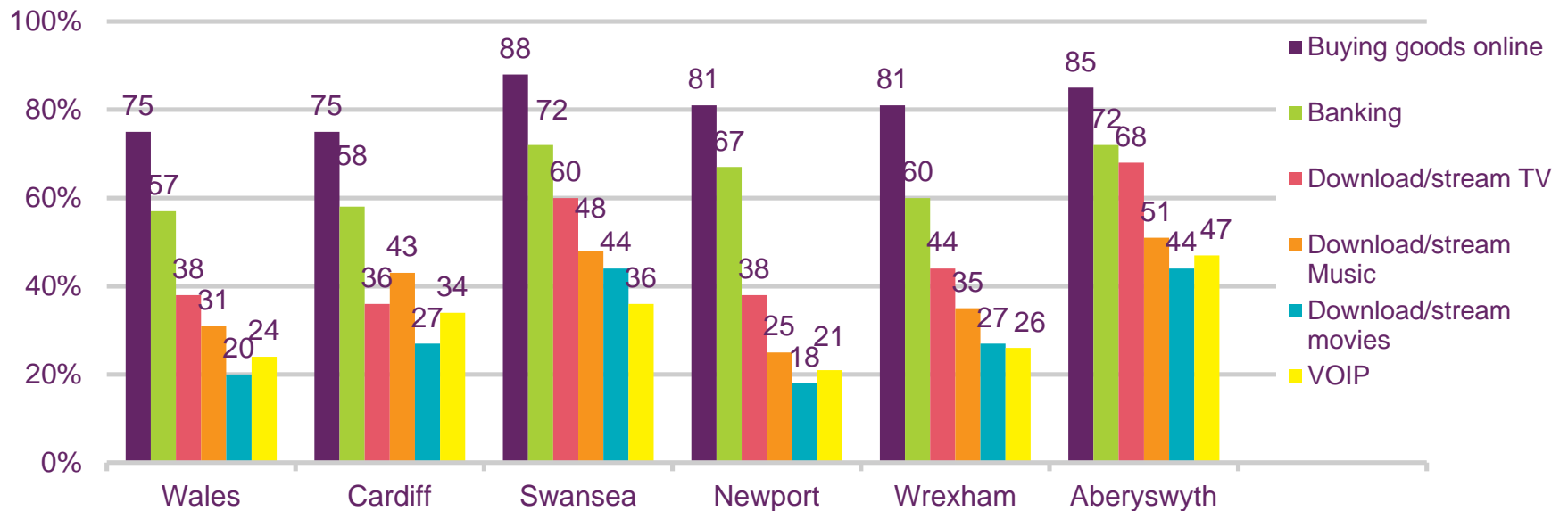
Base: All adults 15+ (Wales 5287, Aberystwyth, 146, Cardiff 196, Newport 292, Swansea 208 and Wrexham 211)

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?

# Usage of internet services in Welsh towns and cities



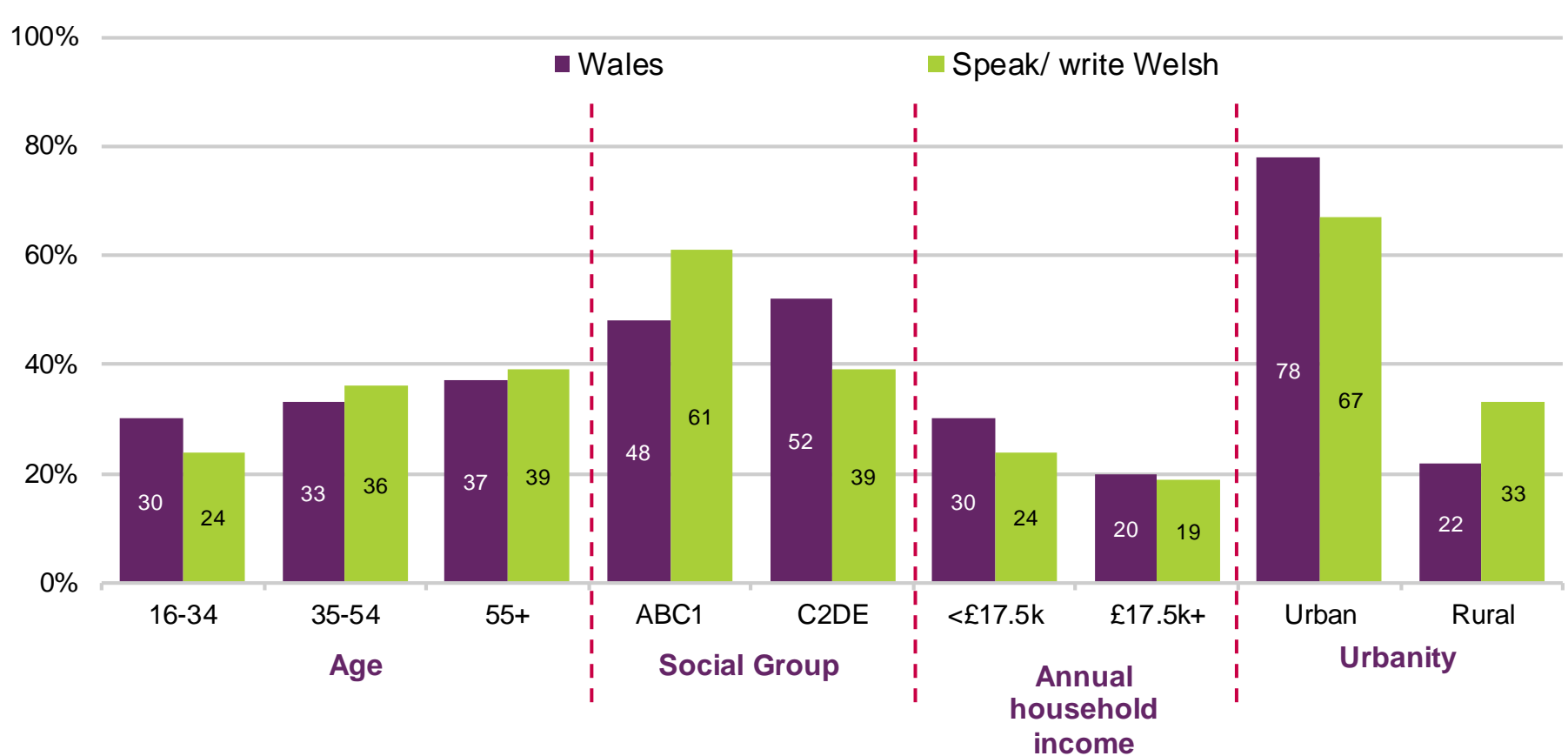
Source: British Population Survey

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

# 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)

## Take-up of communications services and devices in Wales

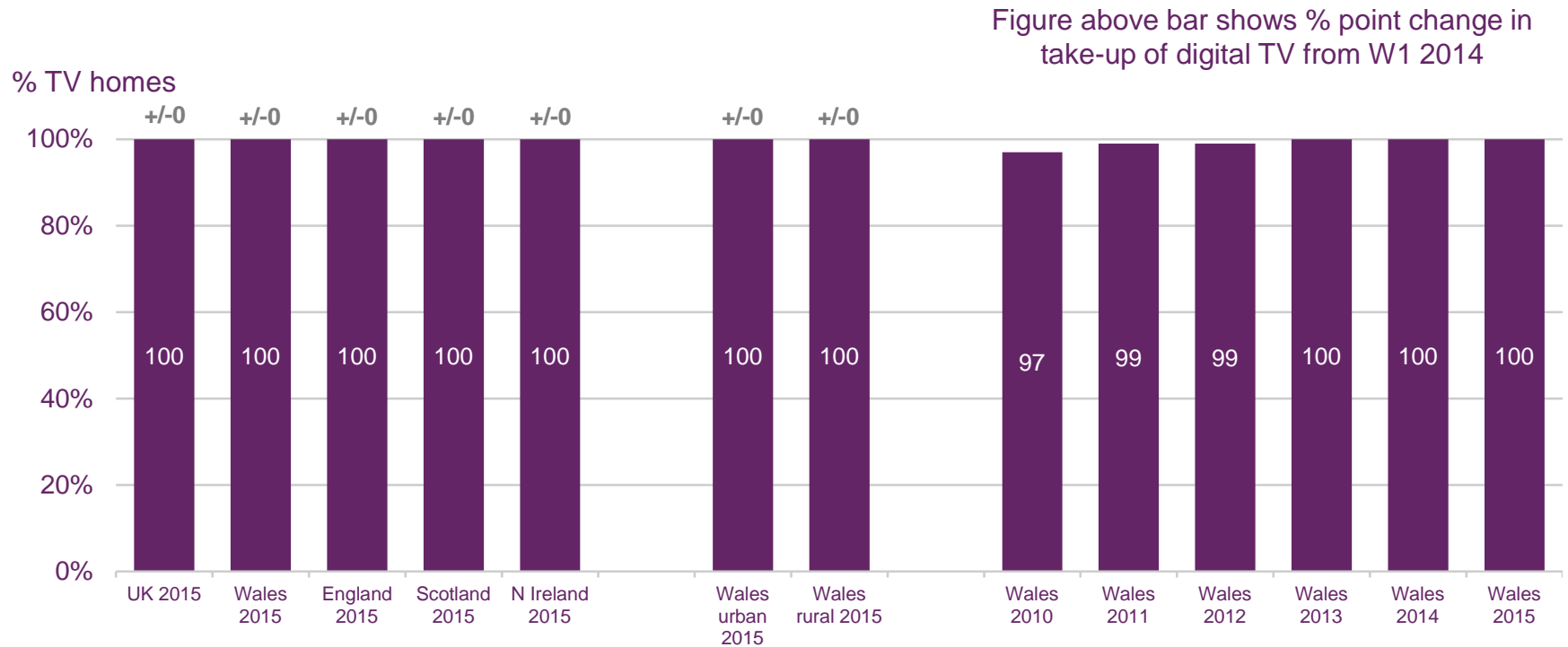
	Wales (total)	Respondents who speak or write Welsh
Fixed Line	83%	93% ↑
Mobile phone (personal use)	90%	85%
Smartphone (personal use)	63%	58%
Computer (any type)	84%	77%
Tablet computer in household	60%	59%
Total Internet	86%	76% ↓
Broadband (fixed and mobile)	78%	73%
Fixed broadband	77%	72%
Mobile internet	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

# Television and audio-visual

# Take-up digital TV

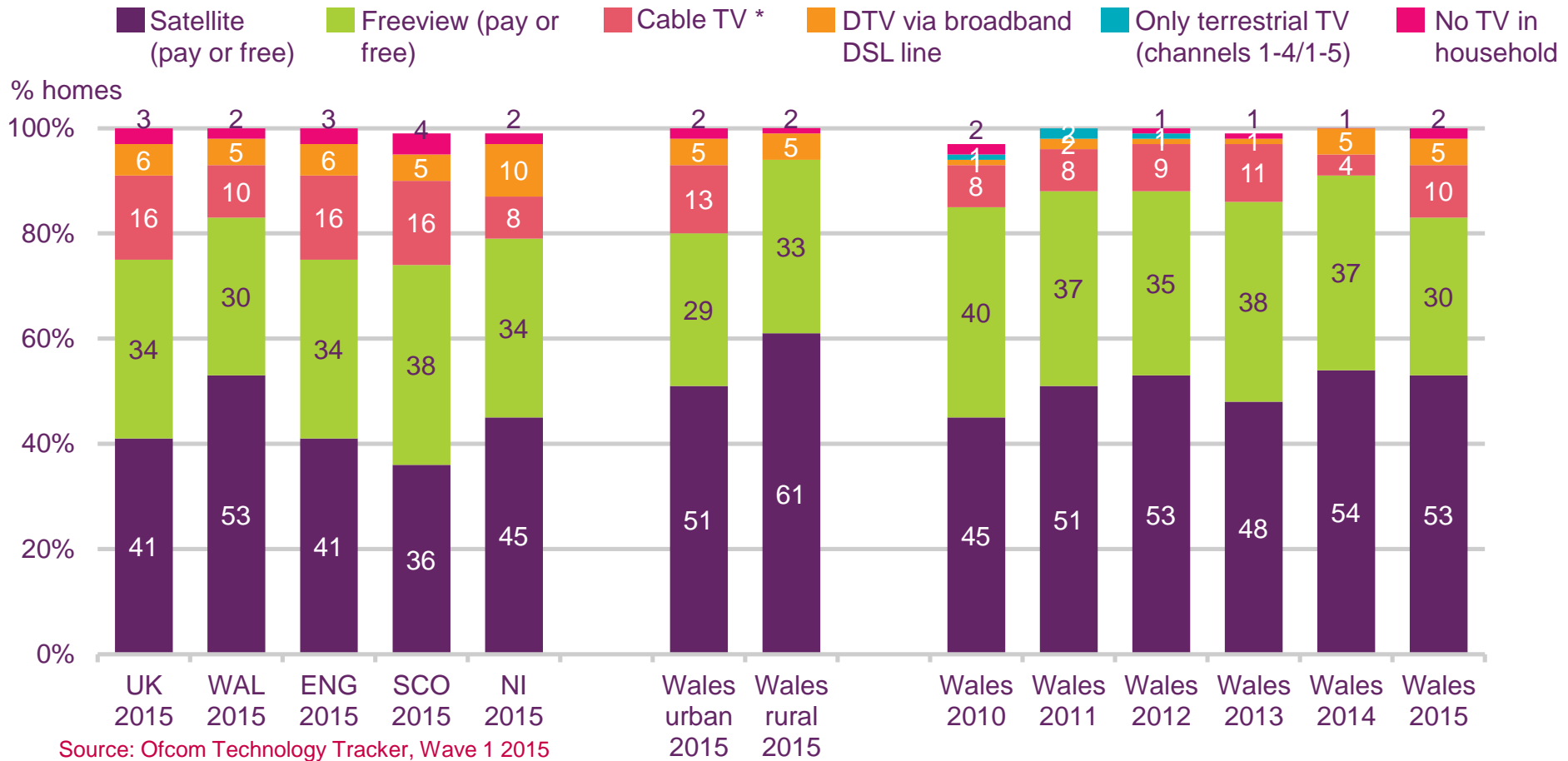


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ with a TV in household (n = 3616 UK, 485 Wales, 2197 England, 472 Scotland, 462 Northern Ireland, 243 Wales urban, 242 Wales rural, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015)

# Main television set share, by platform



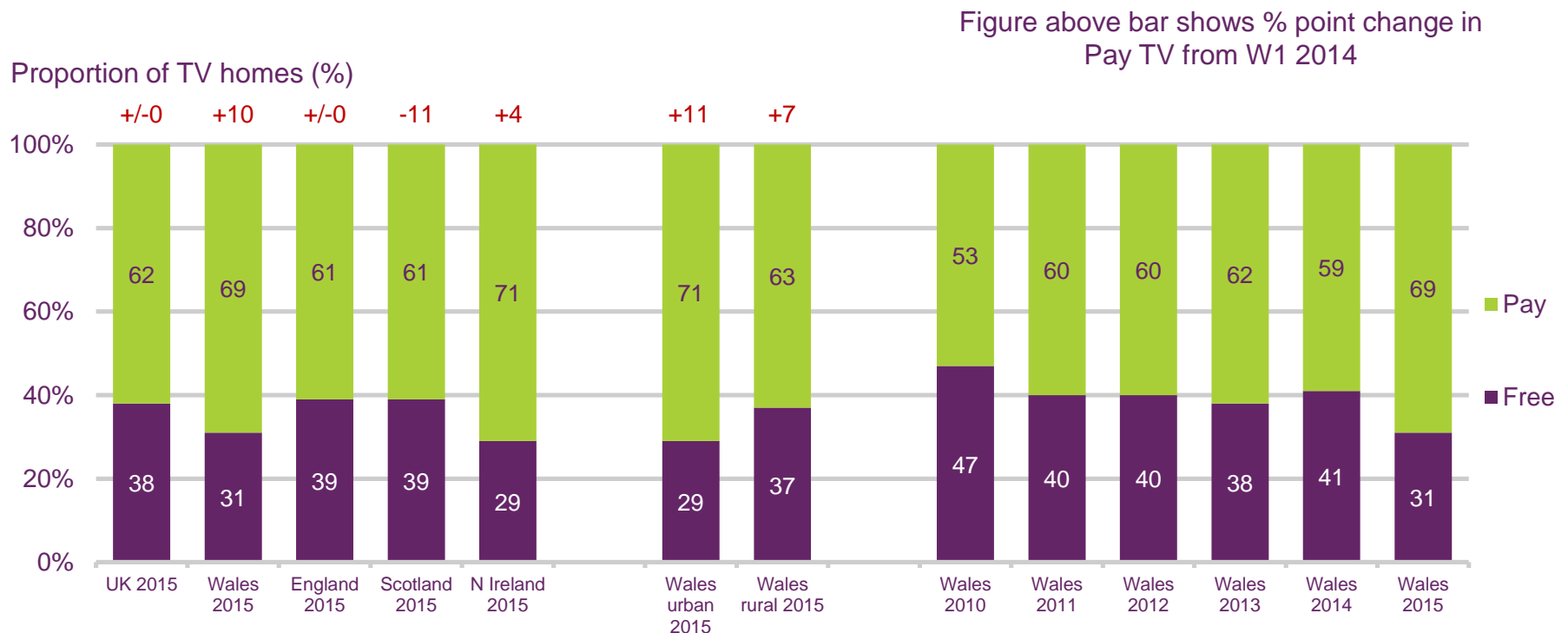
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

QH1a. Which, if any, of these types of television does your household use at the moment?/ QH1b And which of these do you consider is your main type of television?



# Proportion of homes with free and pay television

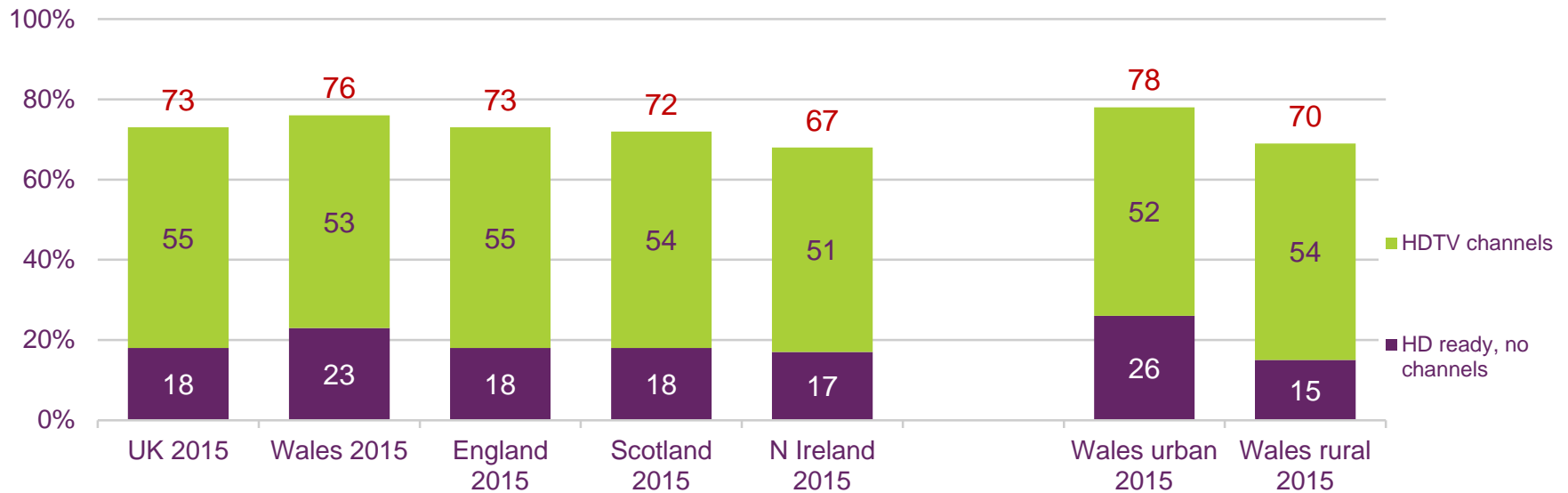


Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ with a TV in household (n = 3616 UK, 485 Wales, 2197 England, 472 Scotland, 462 Northern Ireland, 243 Wales urban, 242 Wales rural, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015)

QH1a. Which, if any, of these types of television does your household use at the moment?

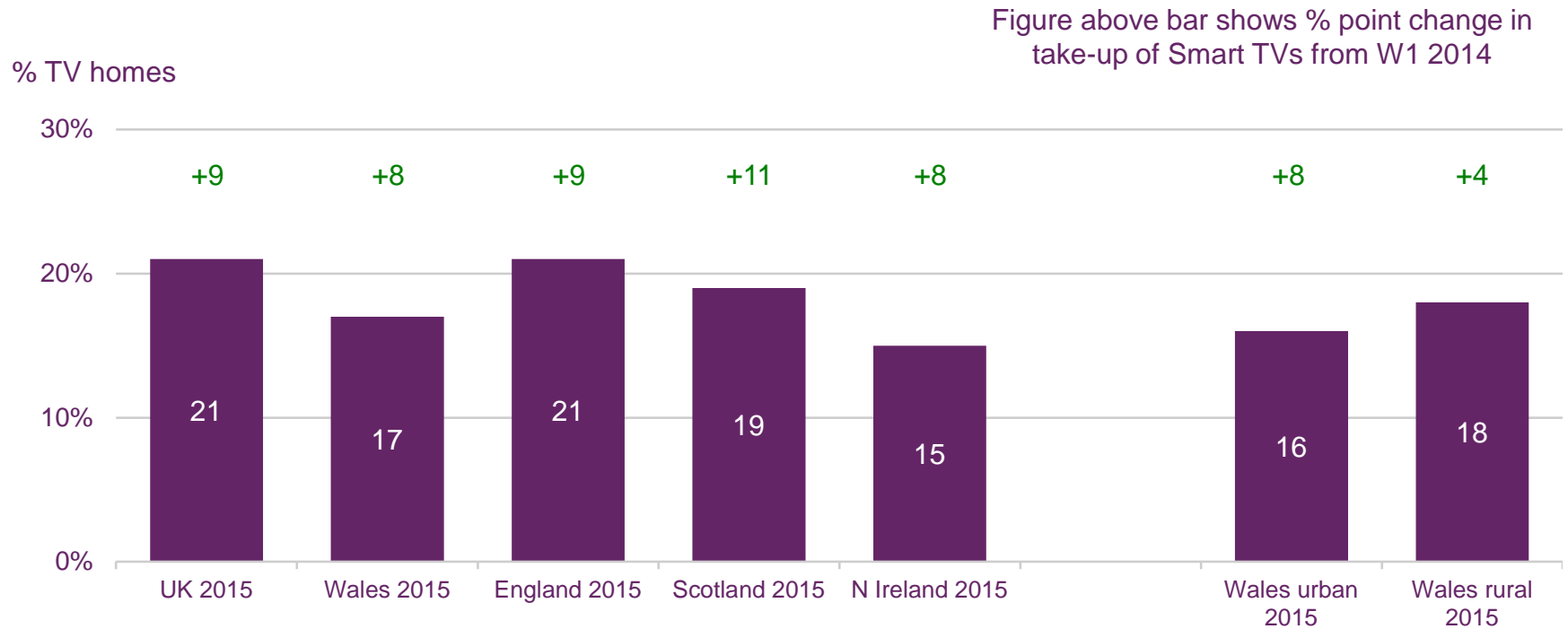
# Proportion of homes with HD television



Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural)  
 QH53. Is the main TV in your household an HDTV set or HD ready?/  
 QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

# Smart TV take-up

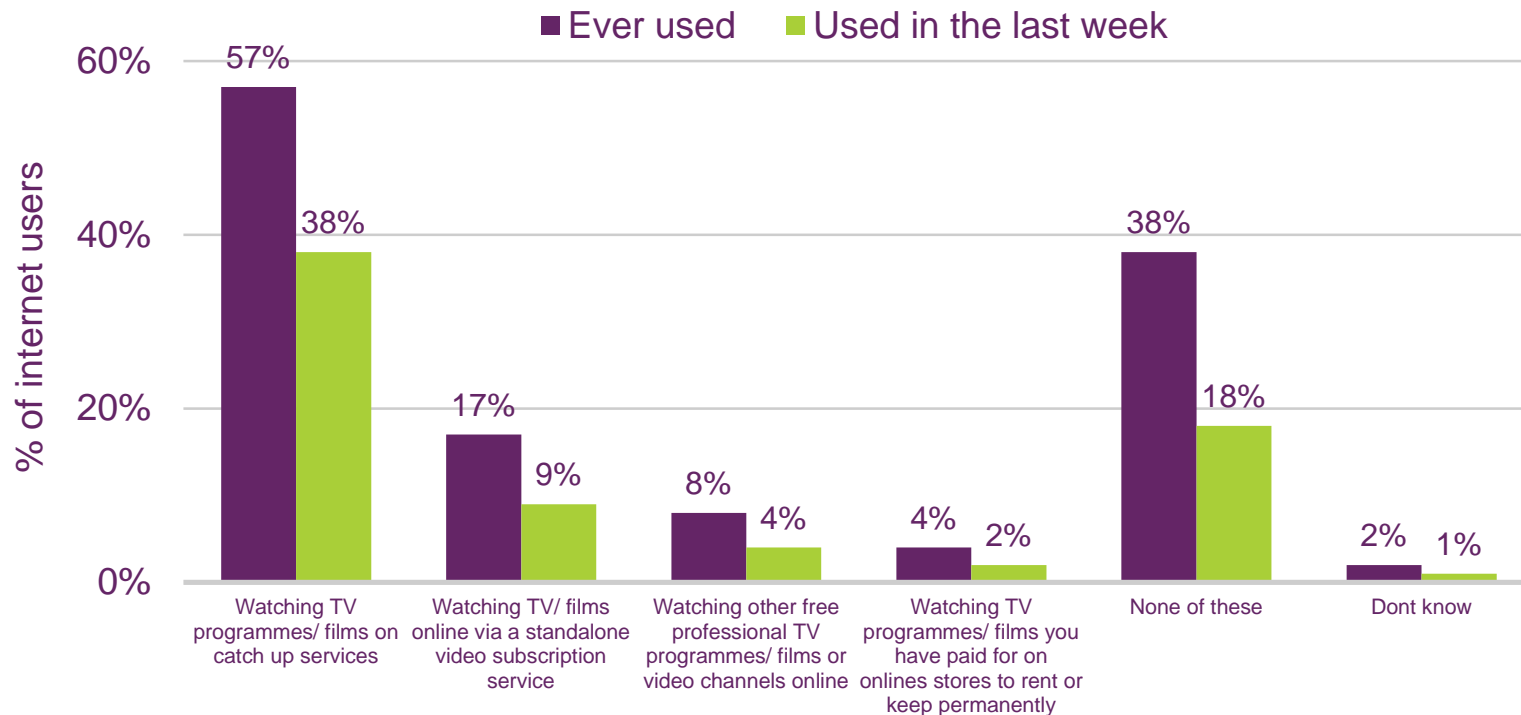


Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ with a TV in household (n = 3616 UK, 485 Wales, 2197 England, 472 Scotland, 462 Northern Ireland, 243 Wales urban, 242 Wales rural)

QH18. 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.

## TV programmes, films, demand on any device

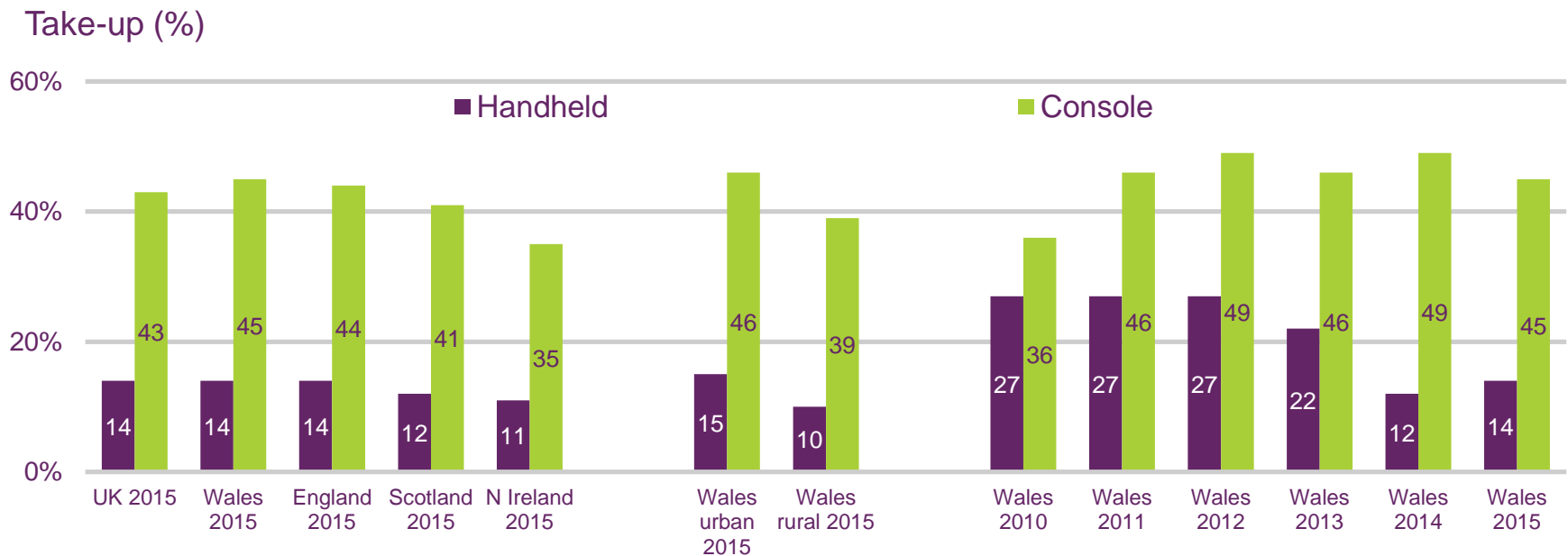


Source: Ofcom Technology Tracker, Wave 1 2015

Base: All Wales adults aged 16+ who use the internet at home or elsewhere (n = 413)

QH17 (QH46)/QH18 (QH47): 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? And which, if any, of these have you used in the last week?

# Take up of leading games consoles in Wales



QB4. Which games console/s do you or does anyone in your household have at the moment?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3612 UK, 496 Wales, 2264 England, 492 Scotland, 360 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

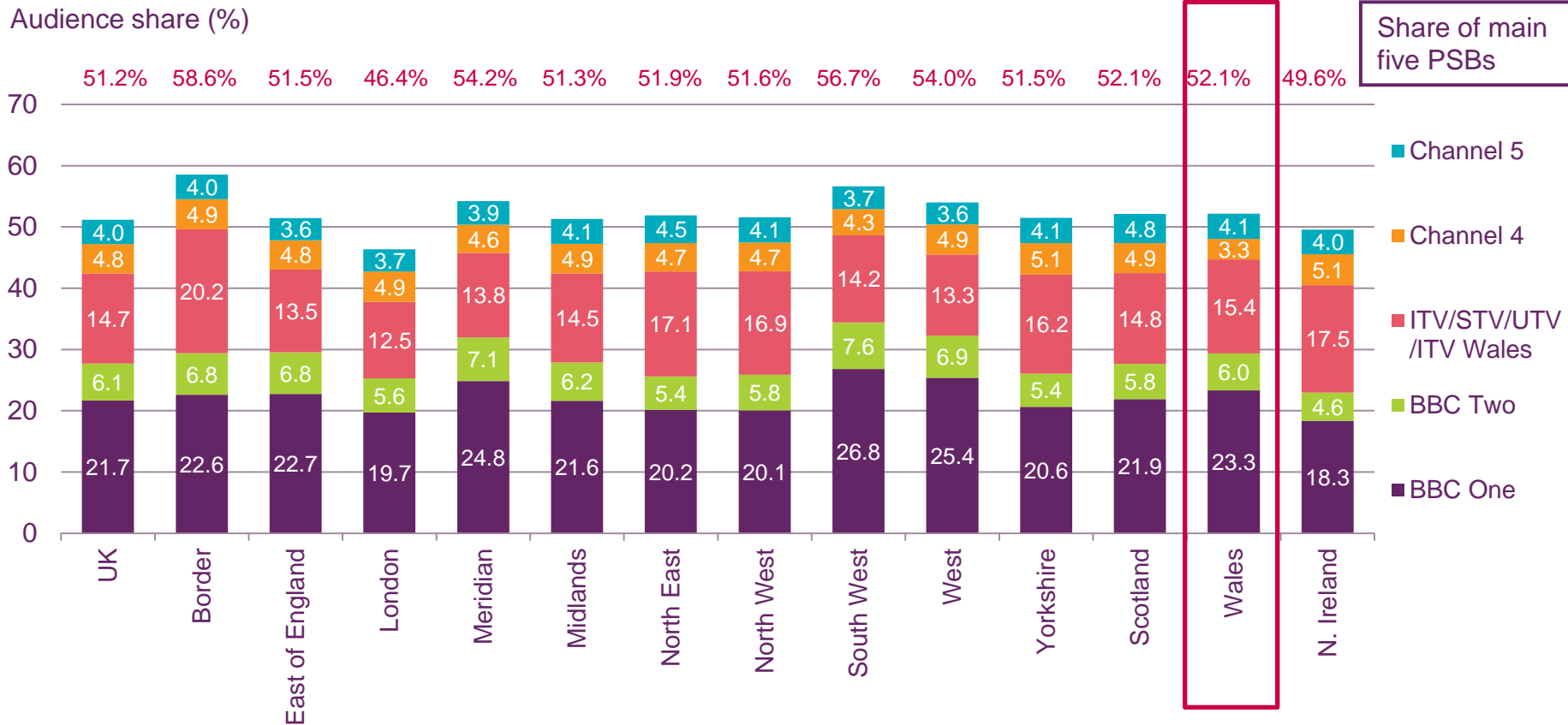
# Average minutes of television viewing per day, by nation: 2014



Source: BARB, Individuals (4+). Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (inc ITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5\*, 5\*+1, 5USA, 5USA+1. HD variants are included where applicable.

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

# Share of the main five PSB channels in all homes, by UK nations and regions: 2014

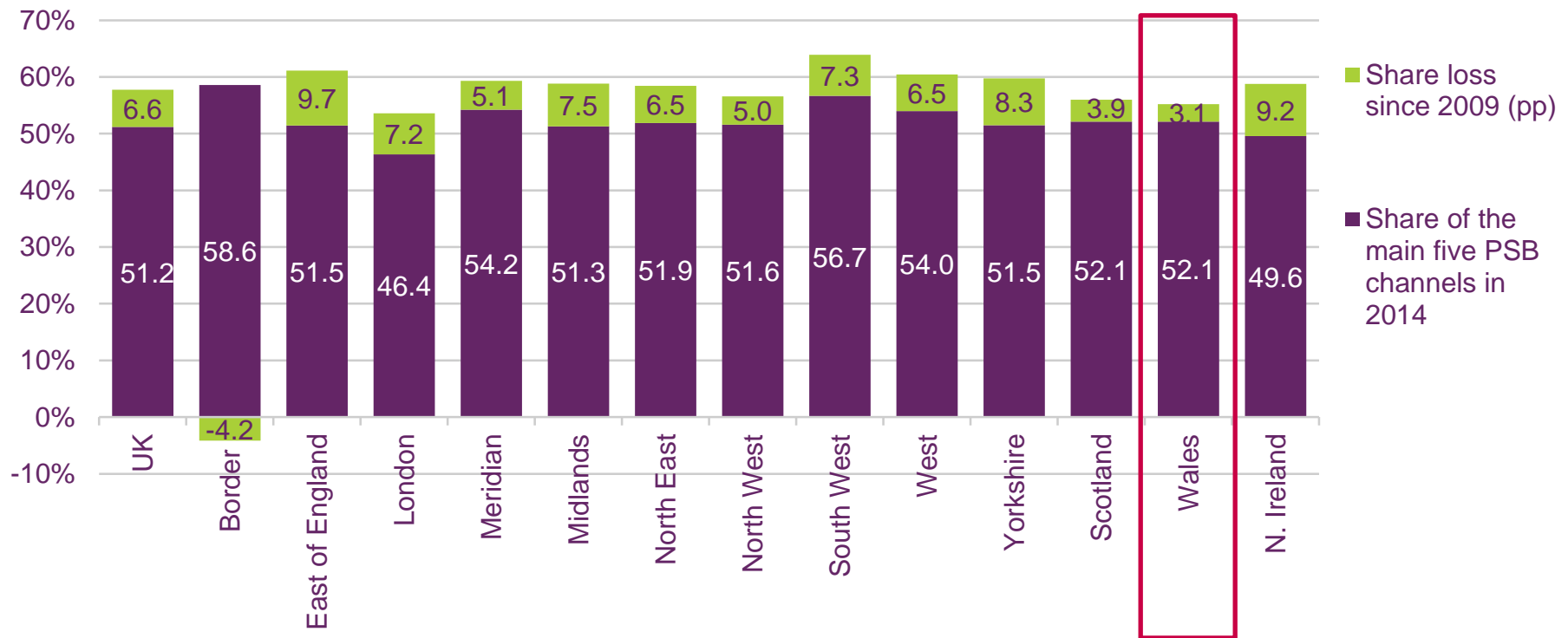


Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

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.

# Reduction in combined share of the main five PSB channels, all homes: 2009 and 2014

Audience share (%)

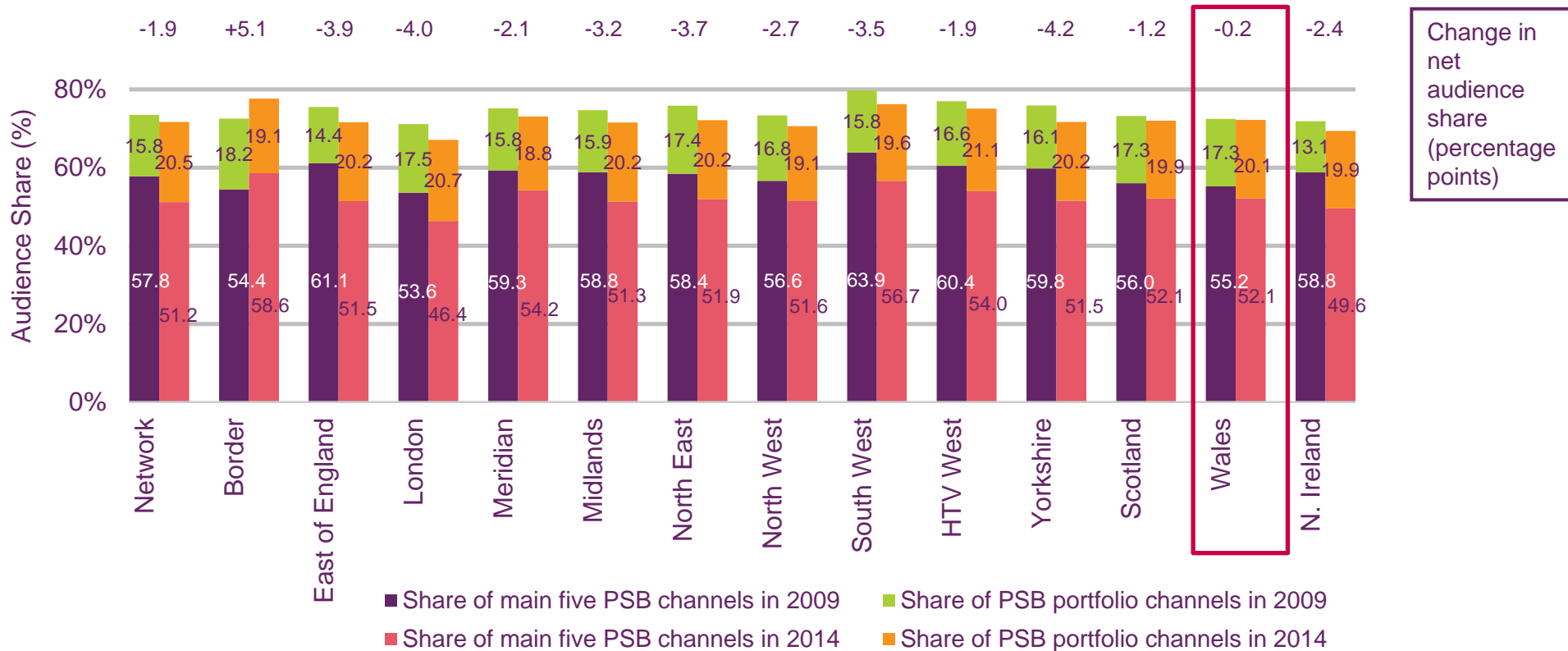


Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2009 but not in 2014. S4C's average share in Wales in 2014 is 1.8% ii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.



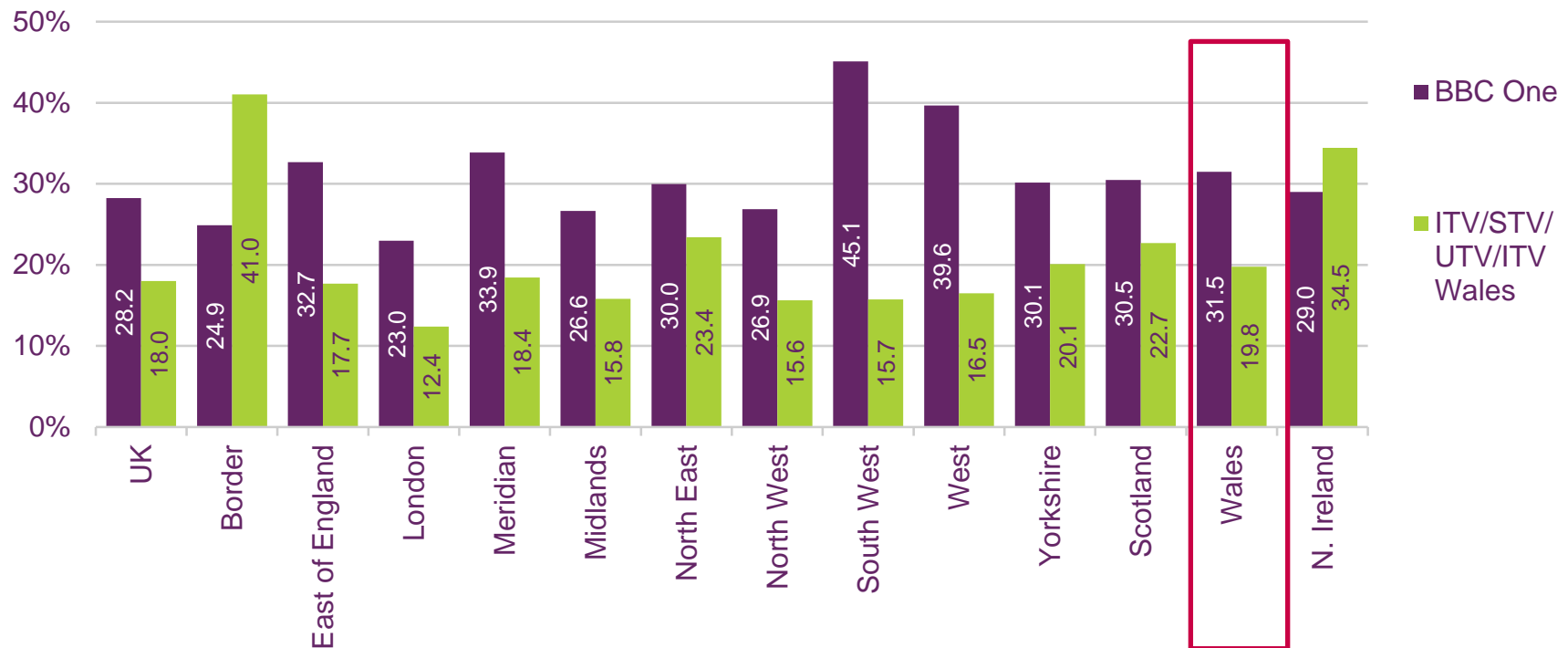
# Net change in the audience share of the main five PSB channels and their portfolio channels, all homes: 2009 and 2014



Source: BARB, Individuals 4+. Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (incITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5\*, 5\*+1, 5USA, 5USA+1. HD variants are included where applicable. Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2008 but not in 2014. S4C's average share in Wales in 2014 is 0.9% ii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

# BBC One and ITV/STV/UTV/ITV Wales early evening news bulletin shares, all homes: 2014

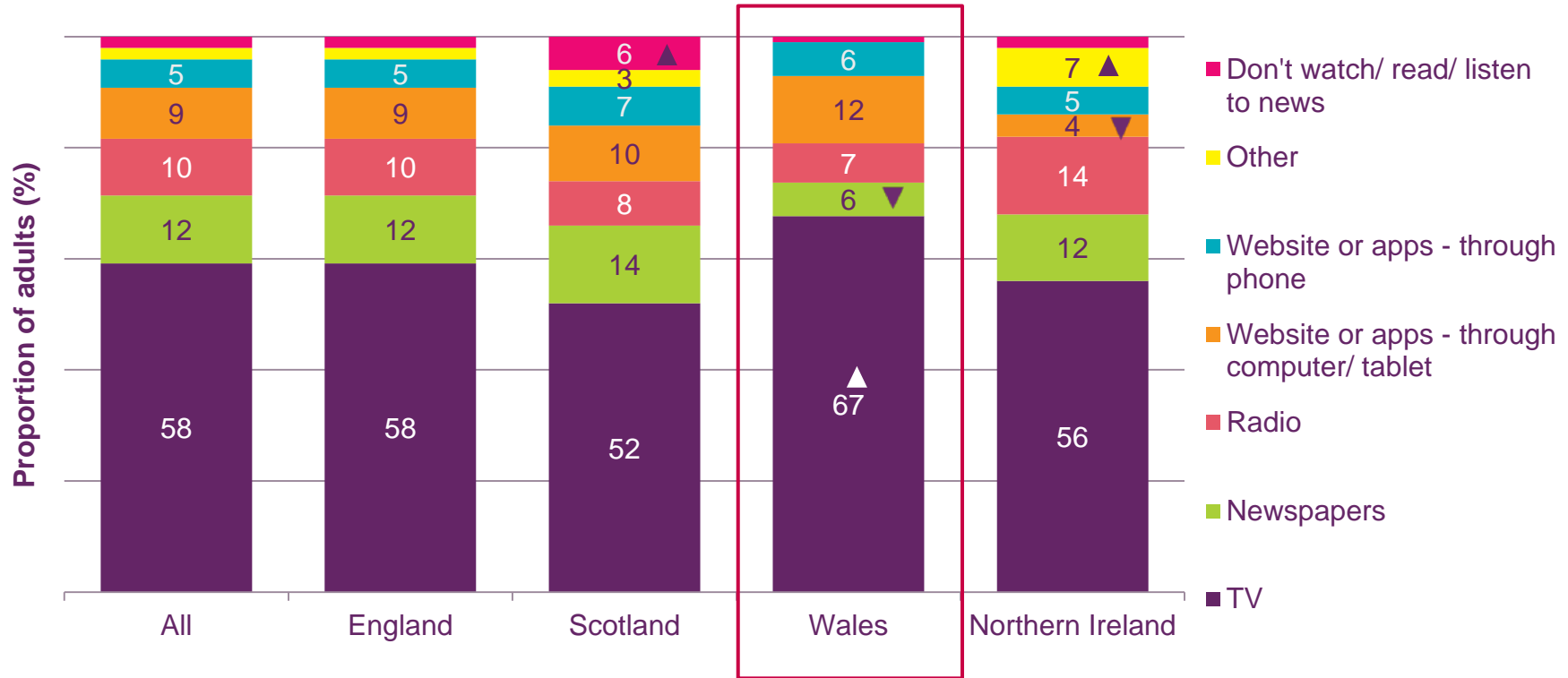
Audience Share (%)



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 part. 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.

# Respondents' main media source for UK and world news by nation: 2014

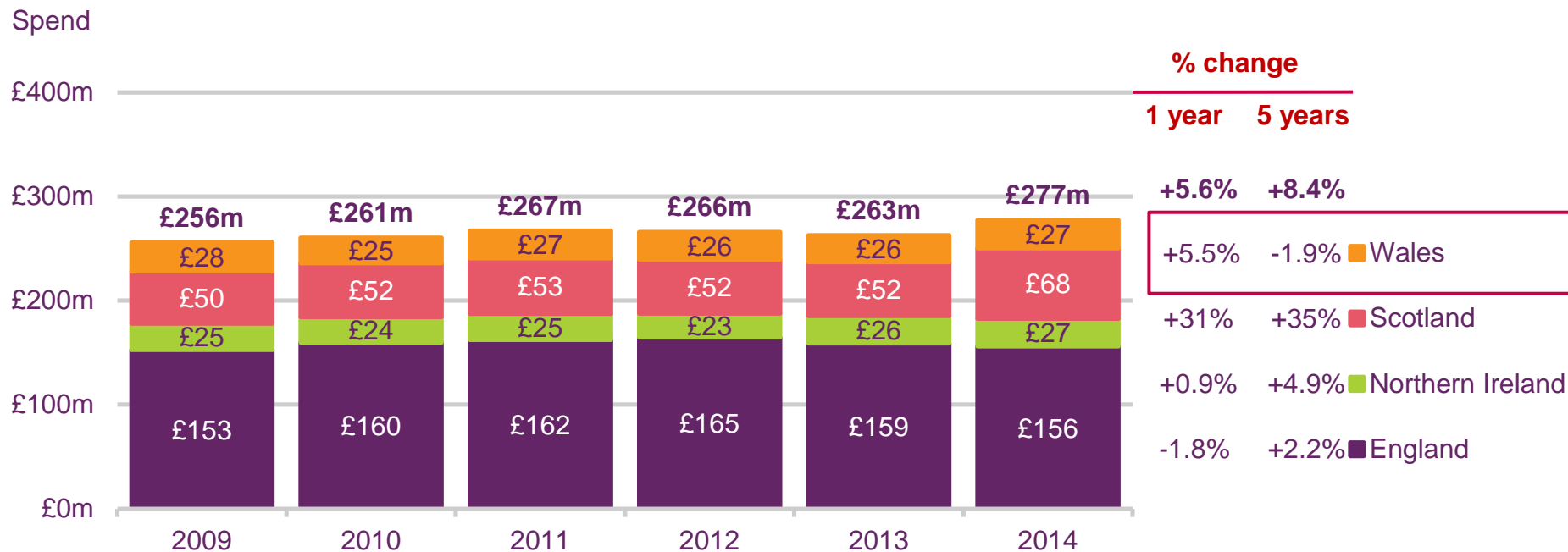


Source: Ofcom Media Tracker 2014.

Base: All (2,074); England (1,577); Scotland (183); Wales (154); Northern Ireland (160). Prompted, single code. Only responses ≥ 3% labelled. Significance testing shows any difference in the main source of news between any nation and all adults.

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?

# 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. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England. For more information on S4C, please see Section 2.6.

# Change in total spend on nations and regions output, by genre and nation: 2009-2014

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
<b>Current Affairs</b>	22%	21%	10%	-1%	28%	43%	49%	61%	16%	29%
<b>News</b>	5%	6%	2%	4%	9%	8%	24%	17%	15%	30%
<b>Non-news/non-current affairs</b>	11%	11%	-2%	119%	-13%	-7%	27%	33%	-2%	-23%
<b>Total Spend in 2014</b>	£285m		£163m		£27m		£69m		£27m	

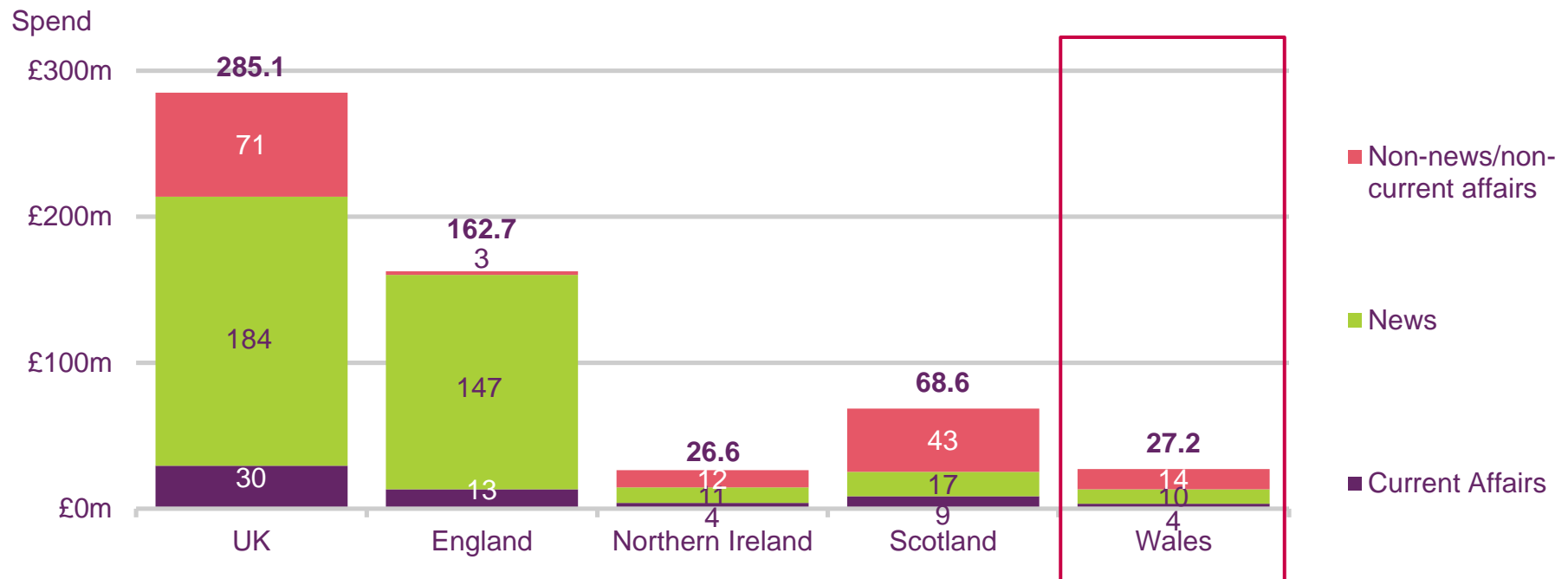
  

	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
<b>Change in Spend</b>	8%	9%	2%	4%	0%	5%	29%	32%	6%	-3%

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 included under England.

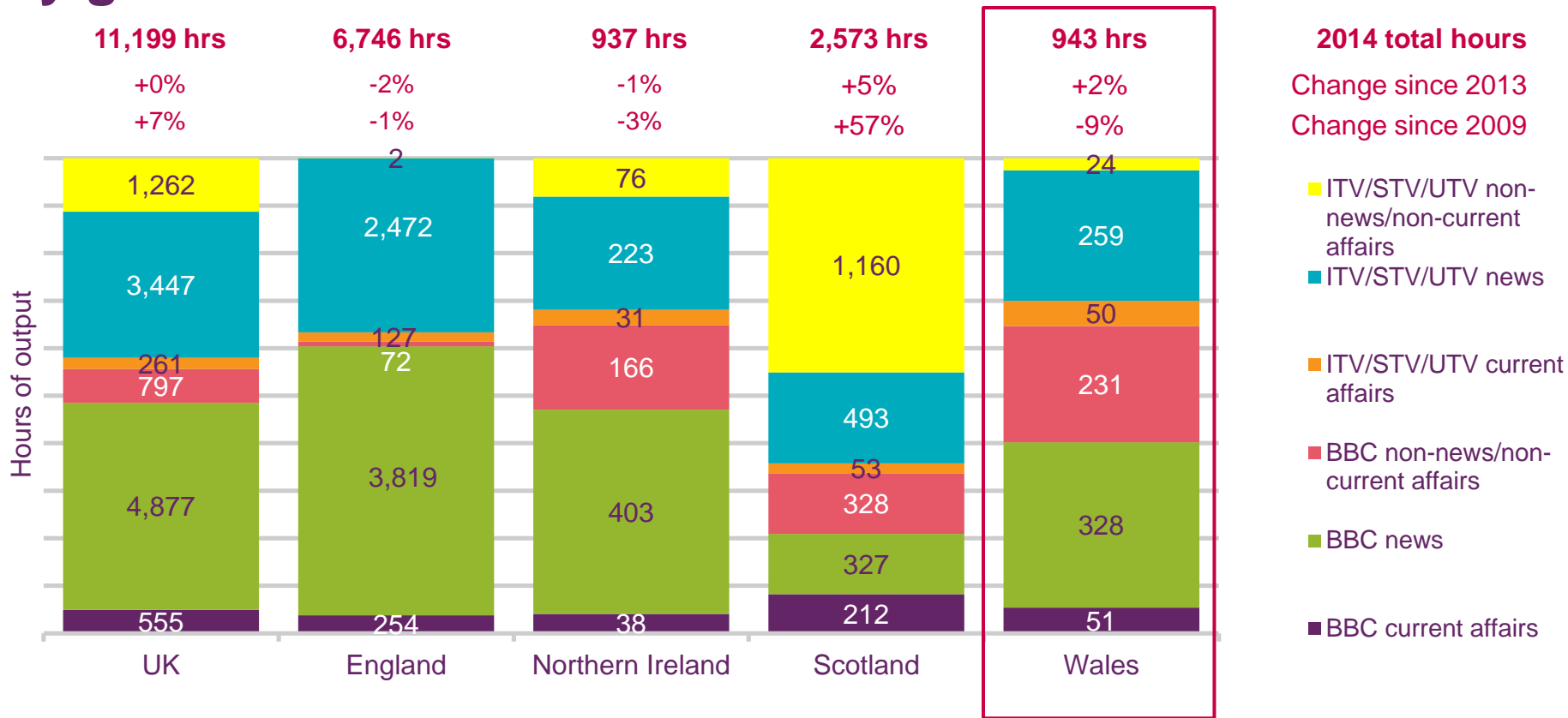
# Total spend by the BBC/ ITV1/ STV/ UTV on non-network nations/regions output for the main PSB channels (BBC1 and Channel 3): 2014



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. Spend on programming for the ITV Border region is included under England.

# First-run originated hours of nations/regions output, by genre and broadcaster: 2014



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. Hours broadcast in the ITV Border region are included under England.

# Cost per hour for total nations' and regions' output, by nation: 2009-2014



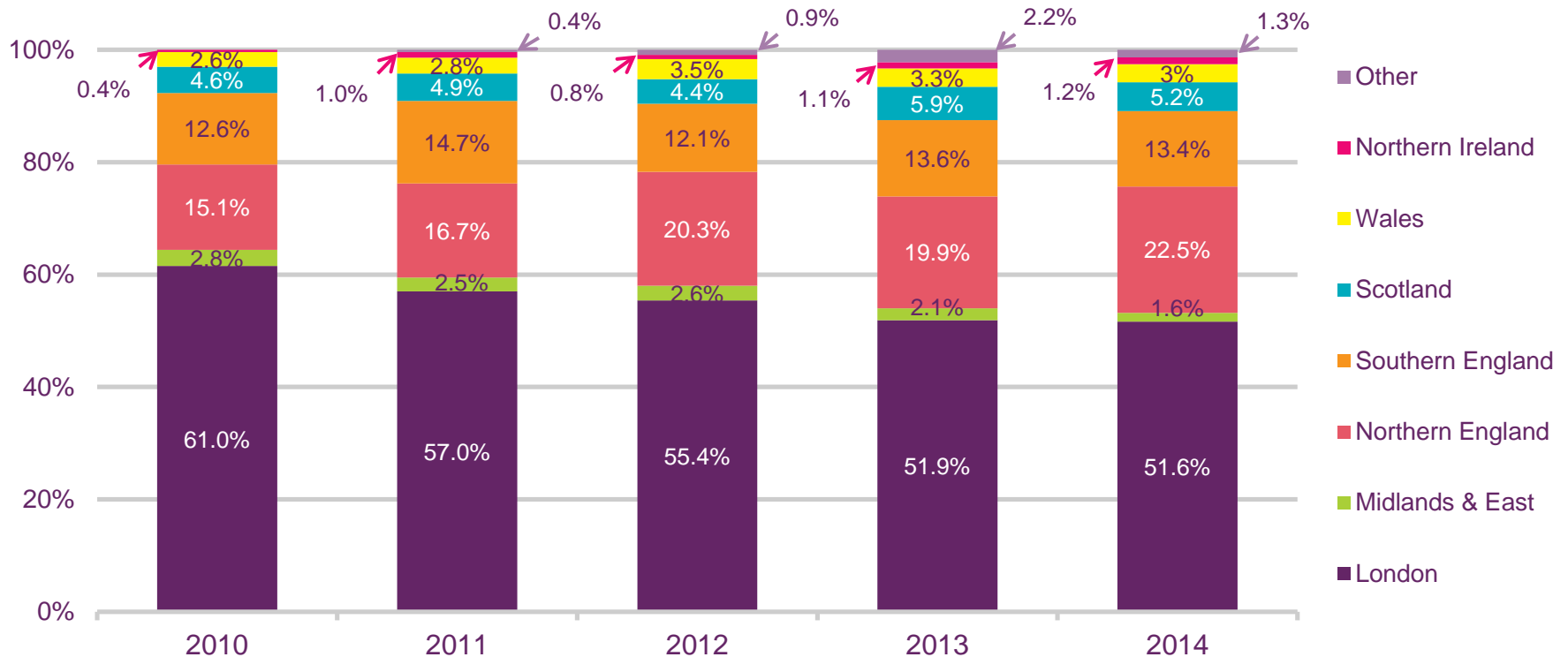
Source: Broadcasters. All figures are nominal.

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 included under England.



# Expenditure on originated network productions: 2010–2014

Percentage of production by value



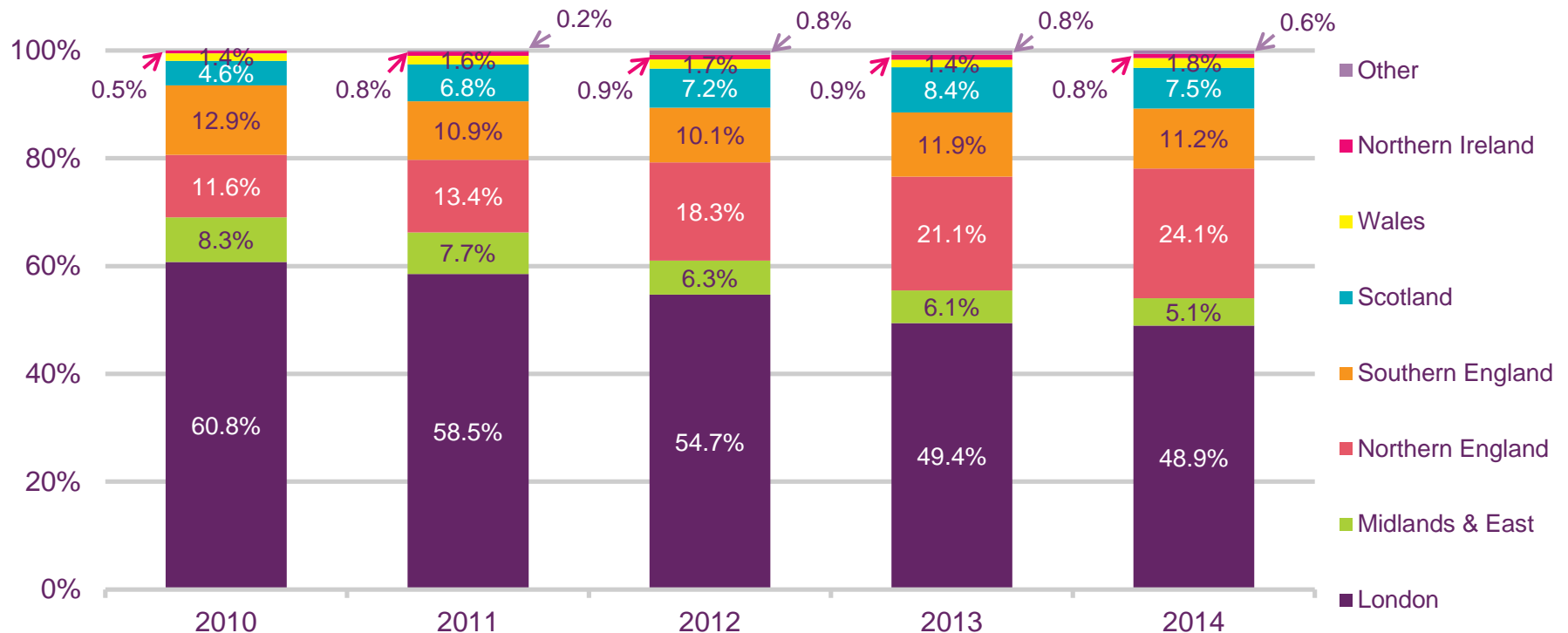
Source: Ofcom/broadcasters

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 offscreen 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/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details

# Volume of originated network productions: 2010–2014

Percentage of production by volume



Source: Ofcom/broadcasters

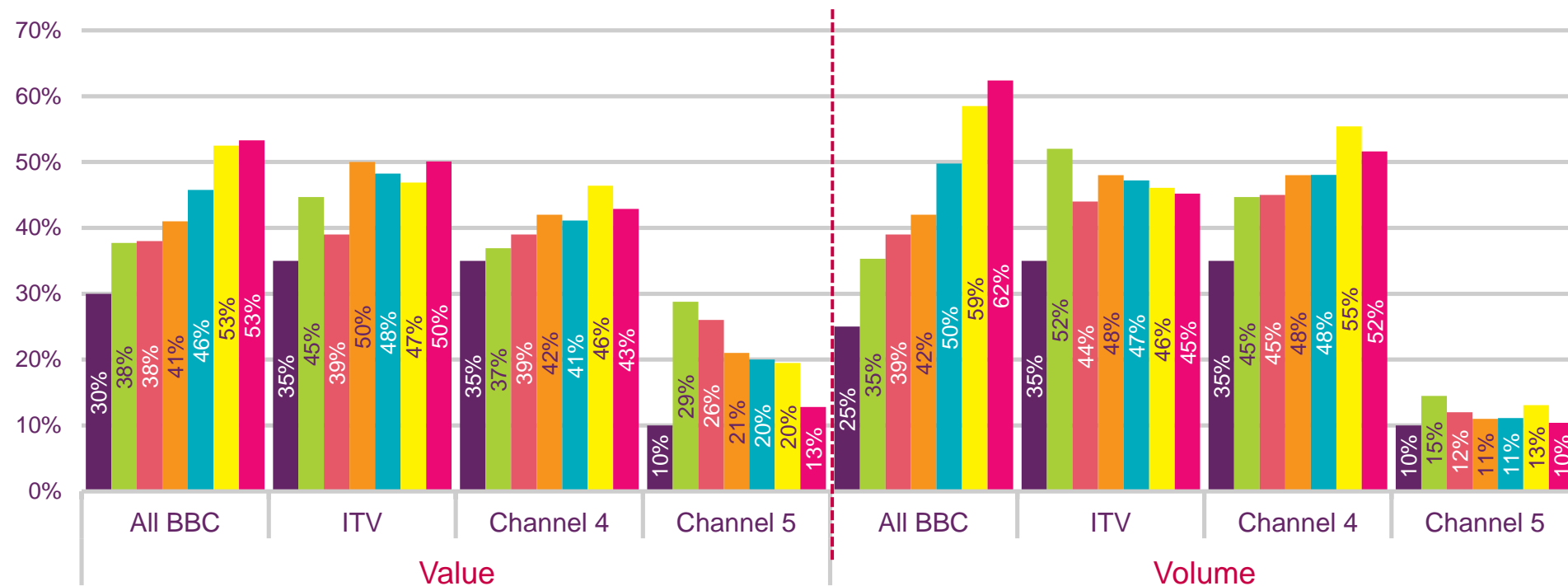
Note: These hours do not include network news production. The category 'Other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of offscreen talent spend was outside the M25 but not all in one macro-region and therefore cannot be attributed to a single region.

See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on the Ofcom website for further details.

# Performance against the Out-of-London production quotas

■ Quota 2014   ■ 2009   ■ 2010   ■ 2011   ■ 2012   ■ 2013   ■ 2014

Percentage of network production produced outside London, by value and by volume



Source: Ofcom/broadcasters

Note: Channel 4 quota increased from 30% to 35% in 2012.

# Out-of-London productions by channel/macro-region: value

Distribution of spend on qualifying productions by macro region and channel (%)

	BBC					ITV					Channel 4					Channel 5				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
London	62.2%	59.0%	54.2%	47.5%	46.7%	61.2%	50.5%	51.7%	53.1%	49.9%	60.6%	58.4%	58.9%	53.6%	57.1%	73.6%	79.4%	80.5%	80.5%	87.2%
Midlands & East	3.9%	3.7%	3.7%	2.7%	1.7%	1.4%	0.7%	0.3%	0.1%	0.0%	1.7%	1.9%	3.4%	3.2%	3.2%	7.2%	4.5%	4.0%	4.7%	3.9%
Northern England	7.7%	9.4%	16.7%	17.2%	23.1%	25.4%	26.2%	27.4%	24.8%	28.0%	19.7%	22.9%	20.6%	22.2%	17.6%	0.1%	0.0%	0.1%	0.9%	1.9%
Southern England	13.0%	11.1%	7.4%	8.5%	7.6%	11.4%	22.2%	20.3%	21.9%	22.0%	13.5%	11.8%	11.0%	13.1%	15.8%	12.1%	14.2%	10.1%	8.7%	5.9%
Scotland	7.4%	9.0%	7.6%	10.9%	9.2%	0.4%	0.4%	0.3%	0.0%	0.0%	4.1%	2.5%	3.2%	3.8%	4.6%	6.2%	1.8%	3.6%	4.9%	1.0%
Wales	5.0%	5.3%	6.8%	6.8%	6.5%	0.1%	0.0%	0.0%	0.0%	0.1%	0.2%	1.4%	1.9%	1.4%	1.1%	0.8%	0.0%	0.0%	0.3%	0.0%
Northern Ireland	0.8%	2.1%	1.3%	2.2%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%	0.4%	0.7%	0.3%	0.0%	0.0%	1.6%	0.0%	0.0%
Other	0.0%	0.5%	2.3%	4.1%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.7%	2.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Regional</b>	<b>37.8%</b>	<b>41.0%</b>	<b>45.8%</b>	<b>52.5%</b>	<b>53.3%</b>	<b>38.7%</b>	<b>49.5%</b>	<b>48.3%</b>	<b>46.9%</b>	<b>50.1%</b>	<b>39.4%</b>	<b>41.6%</b>	<b>41.1%</b>	<b>46.4%</b>	<b>42.9%</b>	<b>26.4%</b>	<b>20.6%</b>	<b>19.5%</b>	<b>19.5%</b>	<b>12.8%</b>

Source: Broadcaster returns

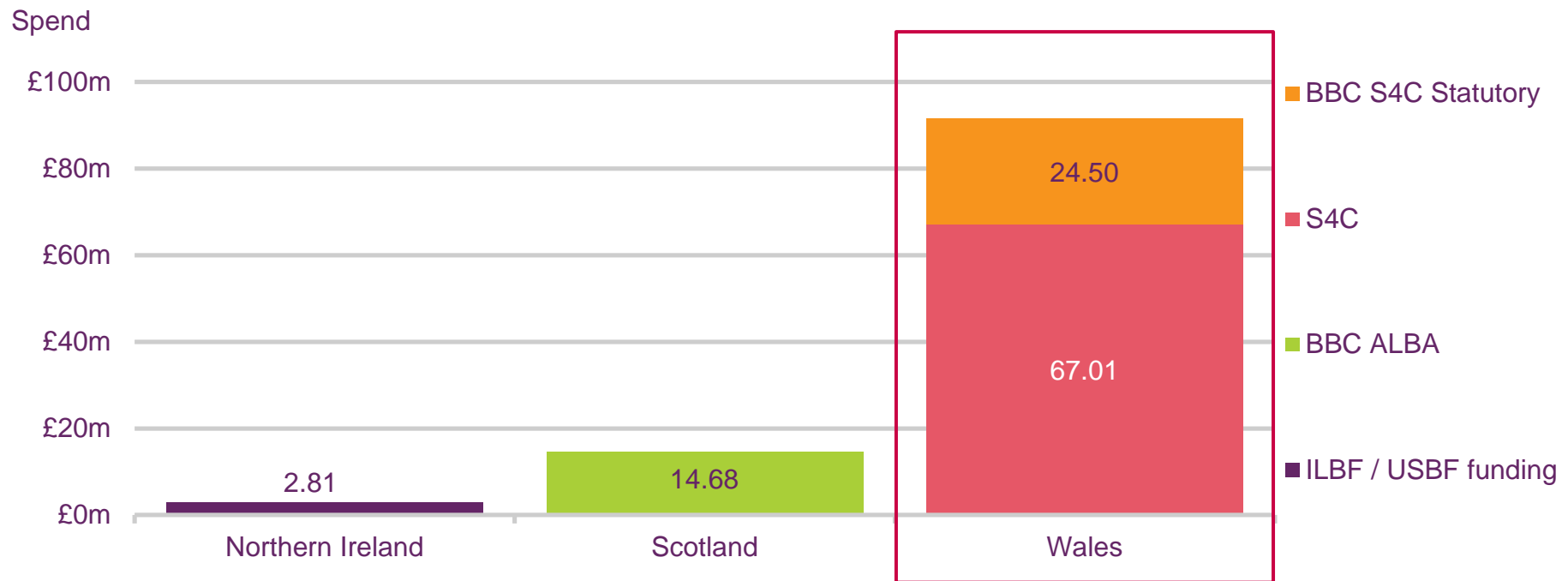
# Out-of-London productions by channel/macro-region: volume

Distribution of hours of qualifying productions by macro region and channel (%)

	BBC					ITV					Channel 4					Channel 5				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
London	61.4%	57.5%	50.2%	41.5%	37.6%	55.6%	52.0%	52.8%	53.9%	54.8%	54.7%	51.6%	52.0%	44.6%	48.4%	88.2%	89.1%	88.9%	86.9%	89.6%
Midlands & East	5.7%	5.4%	3.9%	2.7%	1.8%	19.8%	18.7%	16.0%	15.2%	15.1%	2.3%	1.9%	2.6%	3.5%	2.1%	5.1%	3.7%	2.5%	3.5%	2.8%
Northern England	5.0%	7.0%	18.4%	23.3%	30.6%	19.3%	22.0%	21.0%	20.2%	21.3%	23.3%	24.8%	22.4%	26.1%	23.4%	0.1%	0.1%	0.1%	0.8%	1.1%
Southern England	17.6%	11.9%	8.4%	11.3%	10.0%	5.0%	7.0%	10.1%	10.8%	8.6%	14.0%	15.9%	15.7%	18.3%	19.8%	4.4%	6.3%	6.1%	5.9%	5.7%
Scotland	7.5%	13.6%	13.4%	15.7%	13.8%	0.2%	0.3%	0.1%	0.0%	0.0%	3.7%	2.5%	4.1%	4.8%	4.8%	1.8%	0.9%	1.8%	2.6%	0.8%
Wales	2.0%	2.7%	2.6%	2.5%	3.3%	0.1%	0.0%	0.0%	0.0%	0.1%	1.6%	2.0%	2.2%	1.1%	1.1%	0.5%	0.0%	0.1%	0.3%	0.0%
Northern Ireland	0.8%	1.5%	1.5%	1.7%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.8%	0.7%	0.7%	0.2%	0.0%	0.0%	0.6%	0.0%	0.0%
Other	0.0%	0.3%	1.6%	1.3%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.9%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Regional</b>	<b>38.6%</b>	<b>42.4%</b>	<b>49.8%</b>	<b>58.5%</b>	<b>62.4%</b>	<b>44.4%</b>	<b>48.0%</b>	<b>47.2%</b>	<b>46.1%</b>	<b>45.2%</b>	<b>45.3%</b>	<b>48.4%</b>	<b>48.0%</b>	<b>55.4%</b>	<b>51.6%</b>	<b>11.9%</b>	<b>10.9%</b>	<b>11.1%</b>	<b>13.1%</b>	<b>10.4%</b>

Source: Broadcaster returns

# Other spend on other programming in the devolved nations: 2014

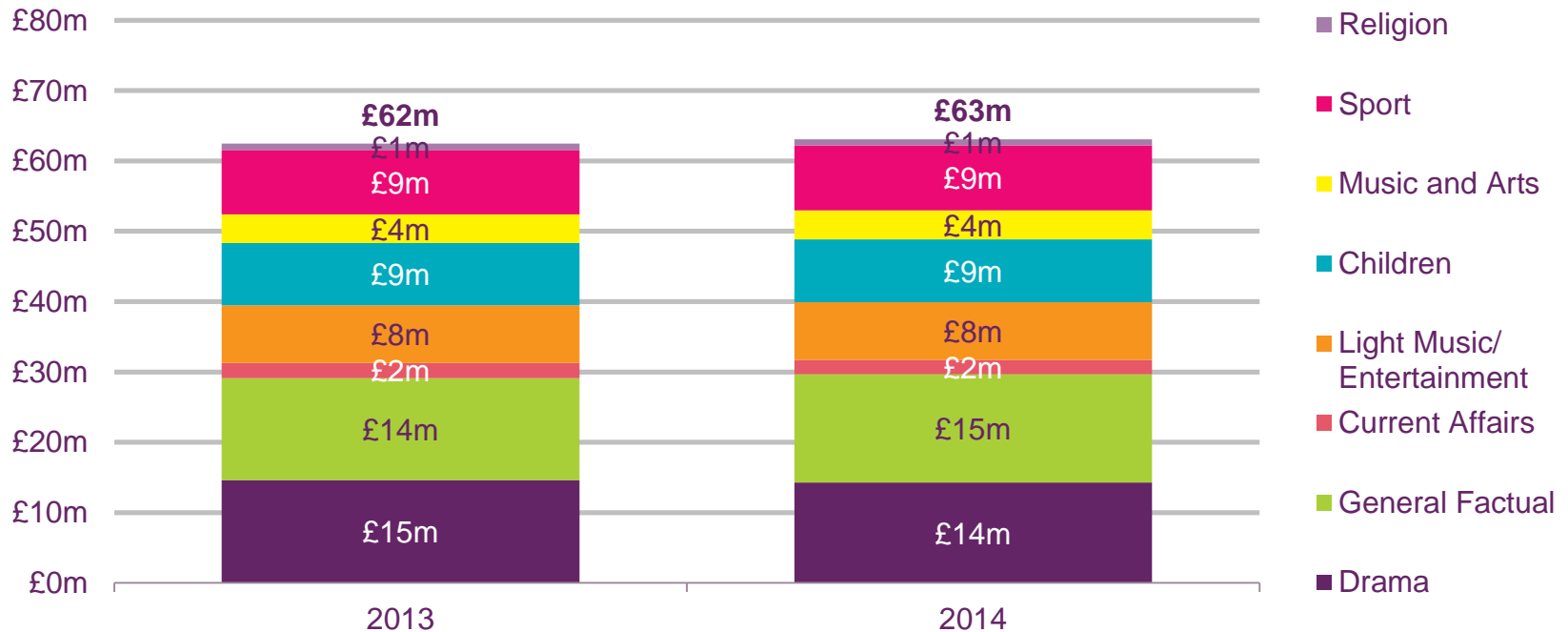


Source: Broadcasters.

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.

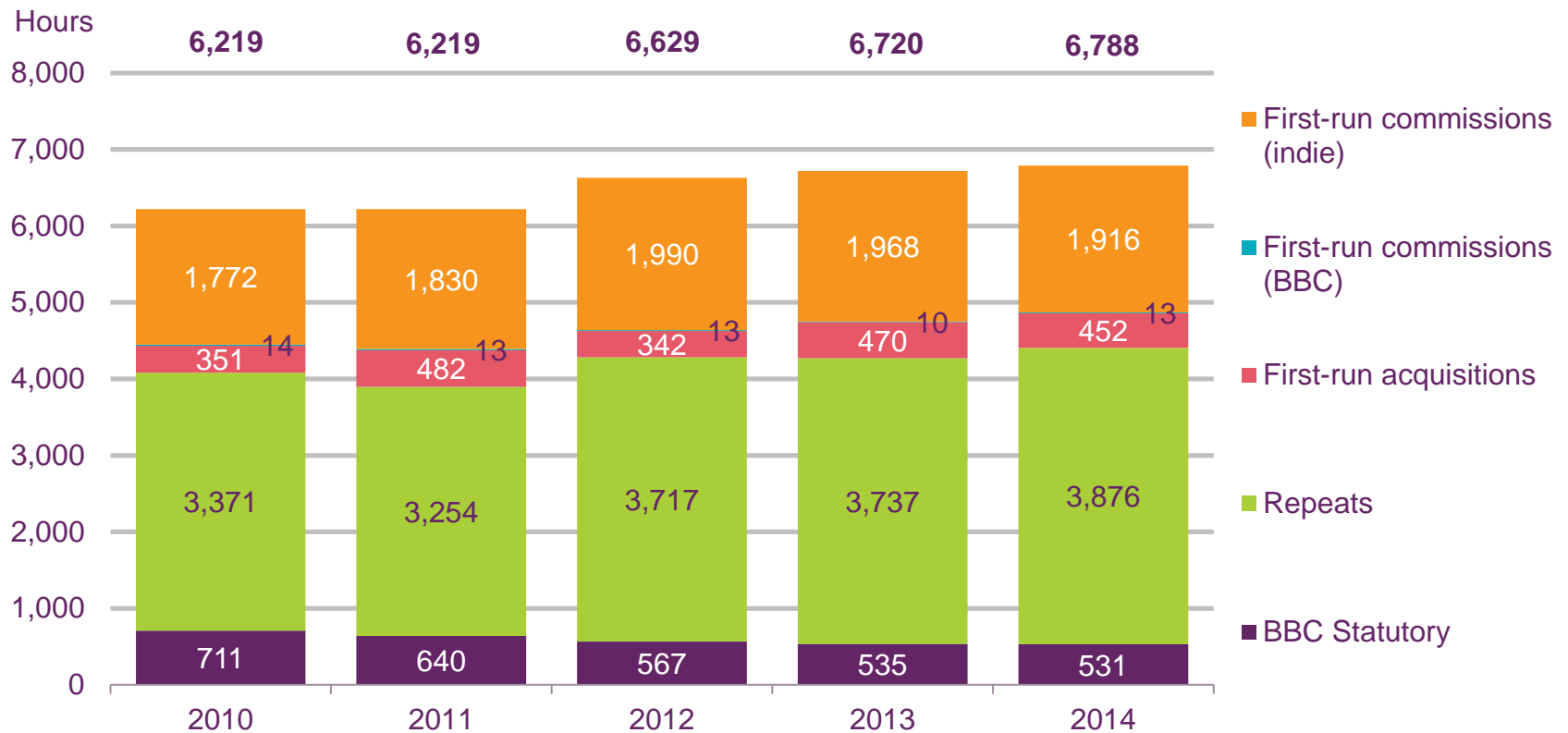
# Spend by S4C on first-run Welsh language programming

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.

# Type of Welsh-language output on S4C, by hours

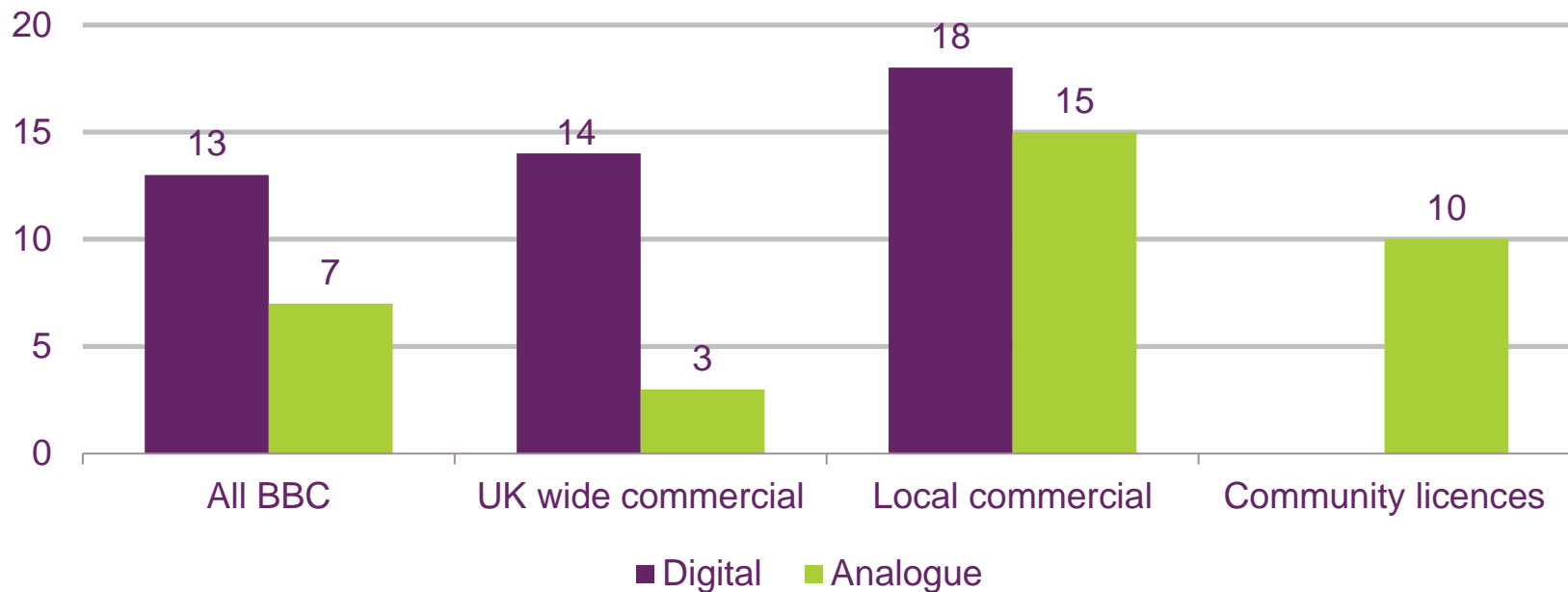


Source: S4C.



# Radio and audio

## Radio station availability in Wales

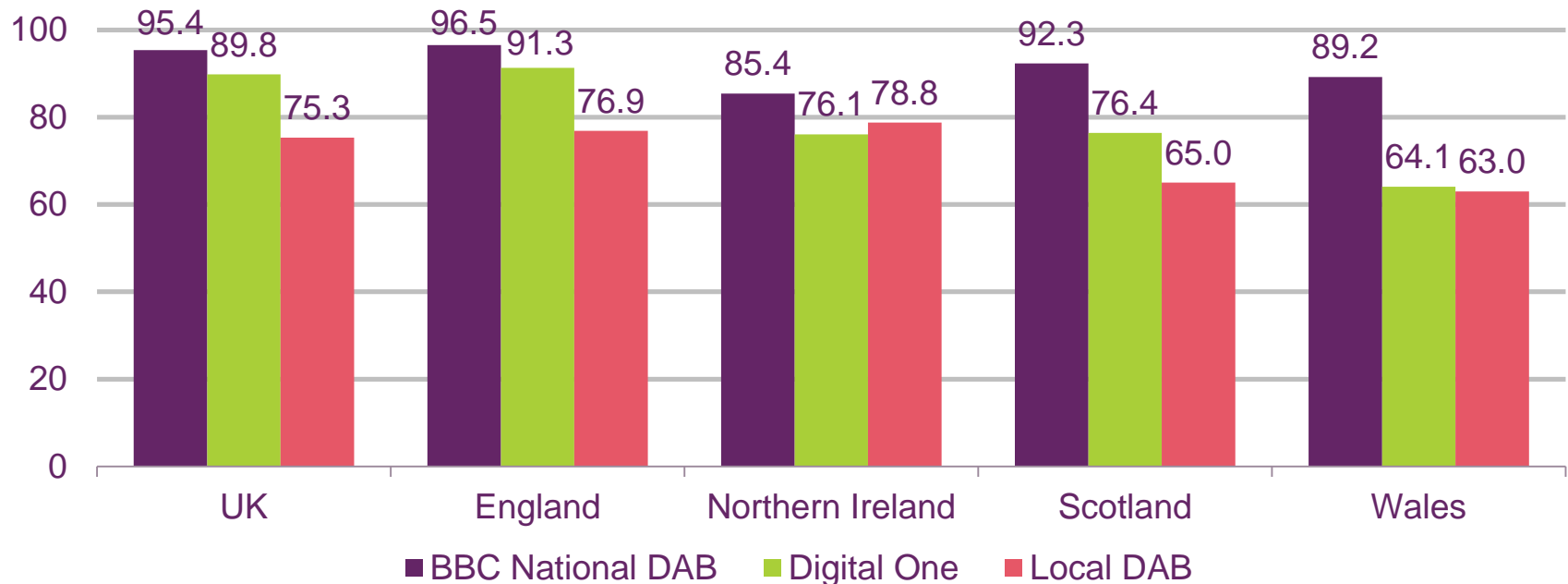


Source: Ofcom, April 2015

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

# Household coverage of DAB

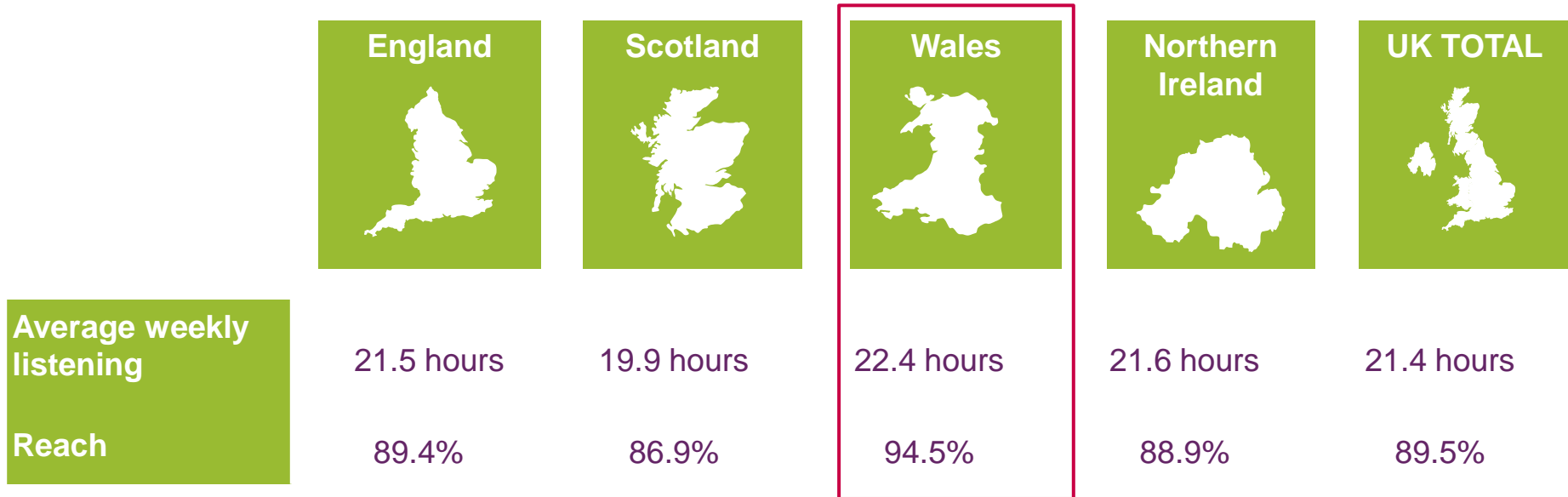
Household coverage (%)



Source: BBC, Arqiva, Ofcom, June 2015]

Note: BBC figures indicate coverage at the end of 2014

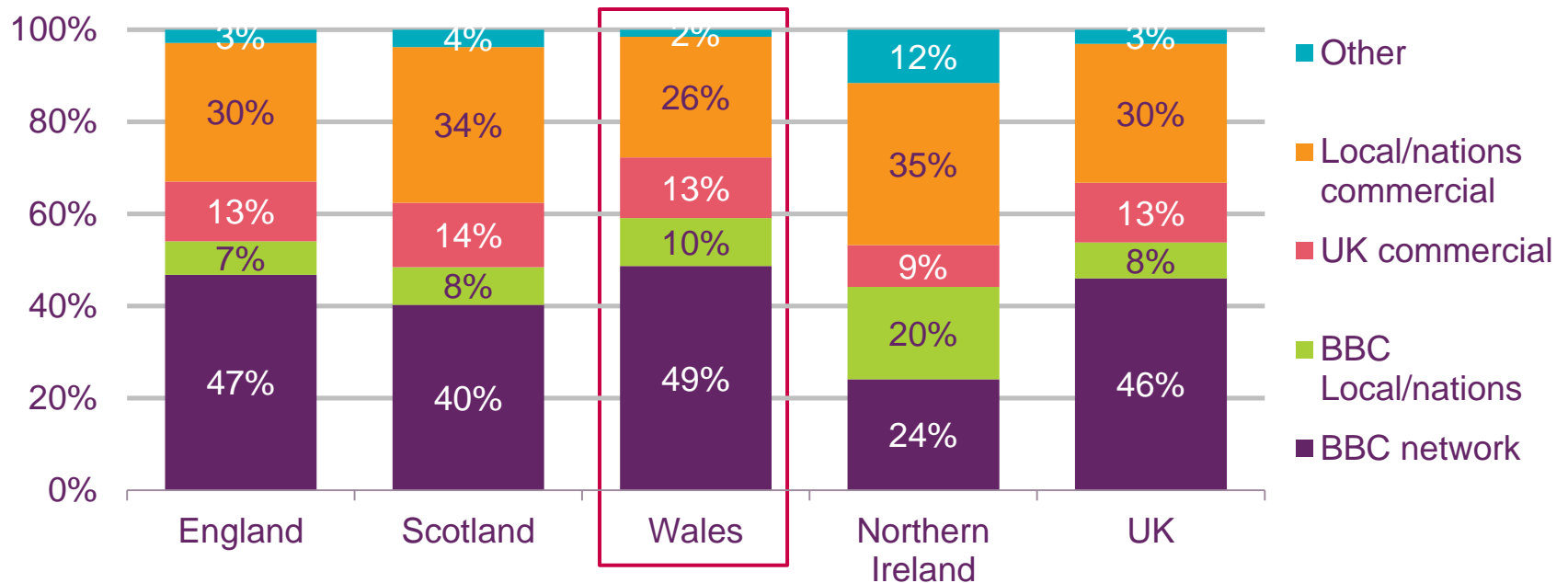
## Average weekly reach and listening hours: 2014



Source: RAJAR, All adults (15+), year ended Q4 2014. Reach is defined as a percentage of the area's adult population who listen to a station for at least five minutes in the course of an average week.

# Share of listening hours by nation: 2014

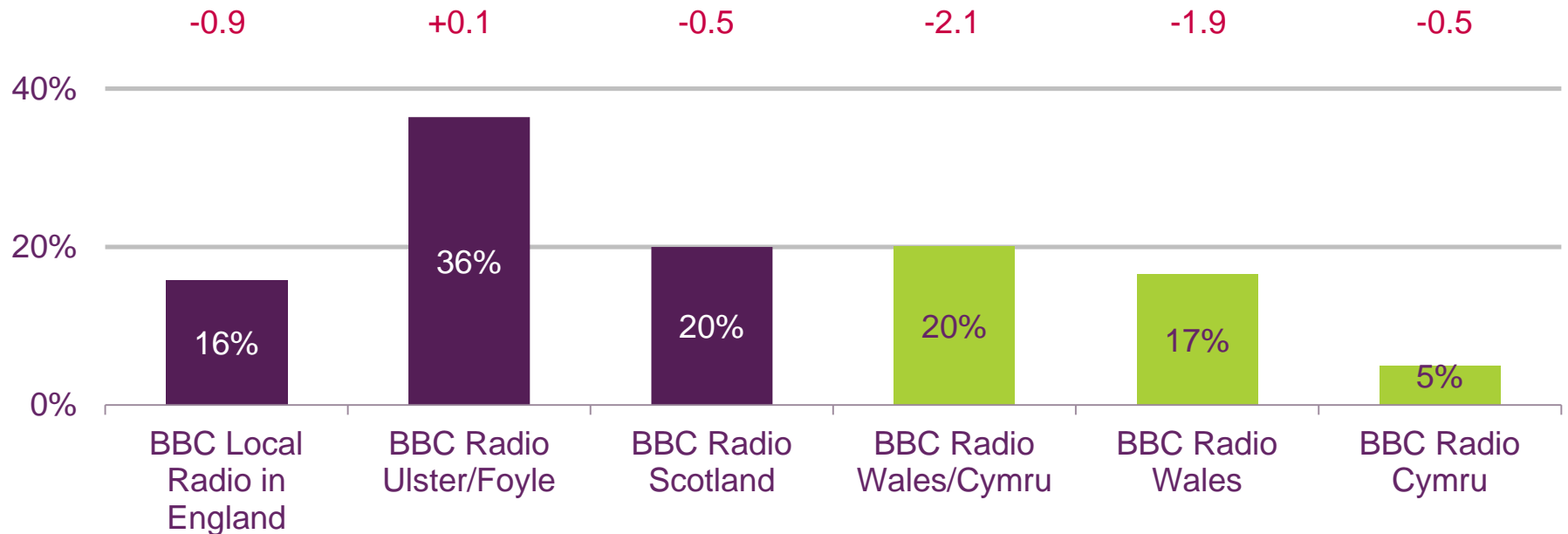
Share of listening hours



Source: RAJAR, All adults (15+), year ended Q4 2014

## Weekly reach for nations/local BBC services: 2014

Change on previous year (percentage points)

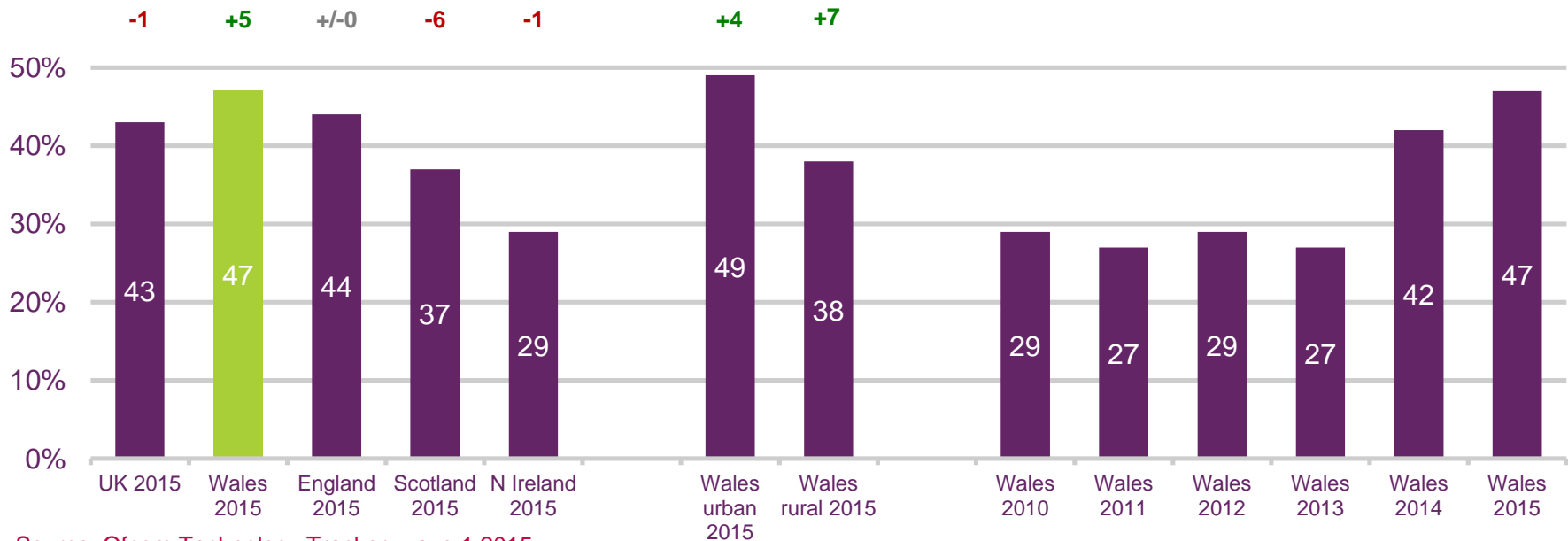


Source: RAJAR, All adults (15+), year ended Q4 2014

# Ownership of DAB digital radios

Percentage of respondents

Figure above bar shows % point change in DAB sets in household from W1 2014



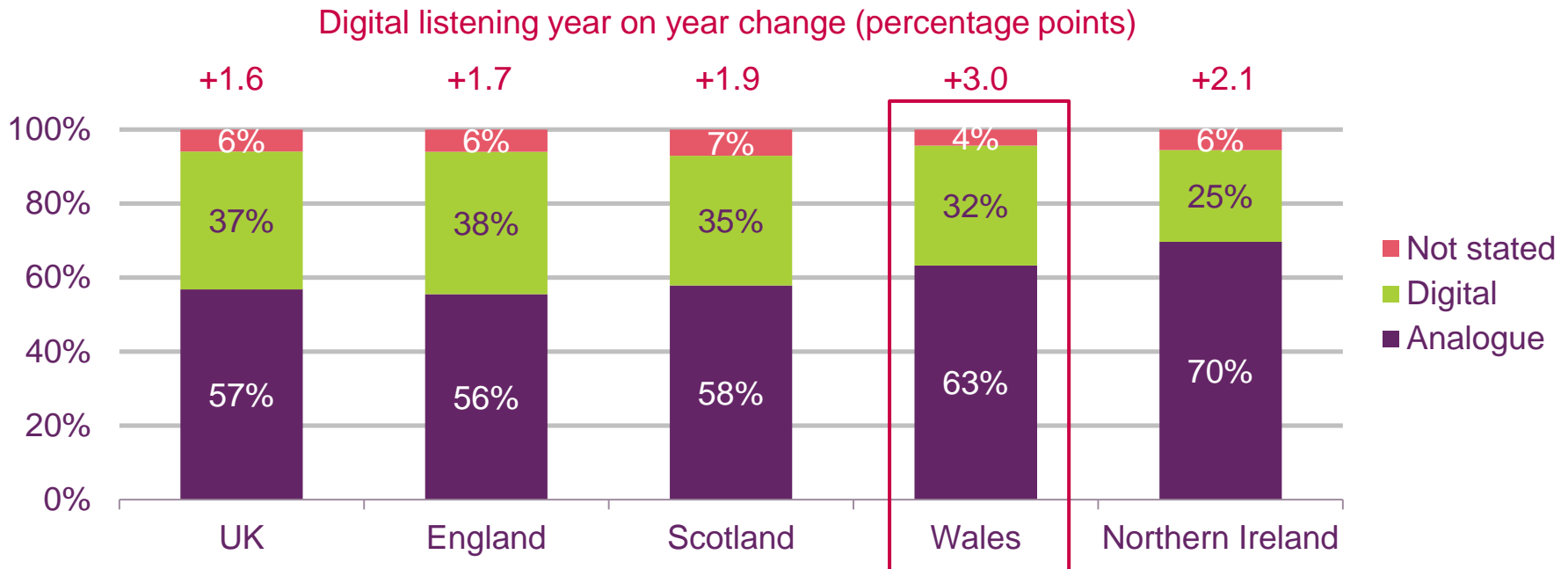
Source: Ofcom Technology Tracker, wave 1 2015

Base: Adults aged 16+ who listen to radio (n = 2934 UK, 406 Wales, 1735 England, 386 Scotland, 407 Northern Ireland, 205 Wales urban, 201 Wales rural, 854 Wales 2010, 397 Wales 2011, 405 Wales 2012, 383 Wales 2013, 403 Wales 2014, 406 Wales 2015)

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

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

# Share of listening hours via digital and analogue platforms: 2014



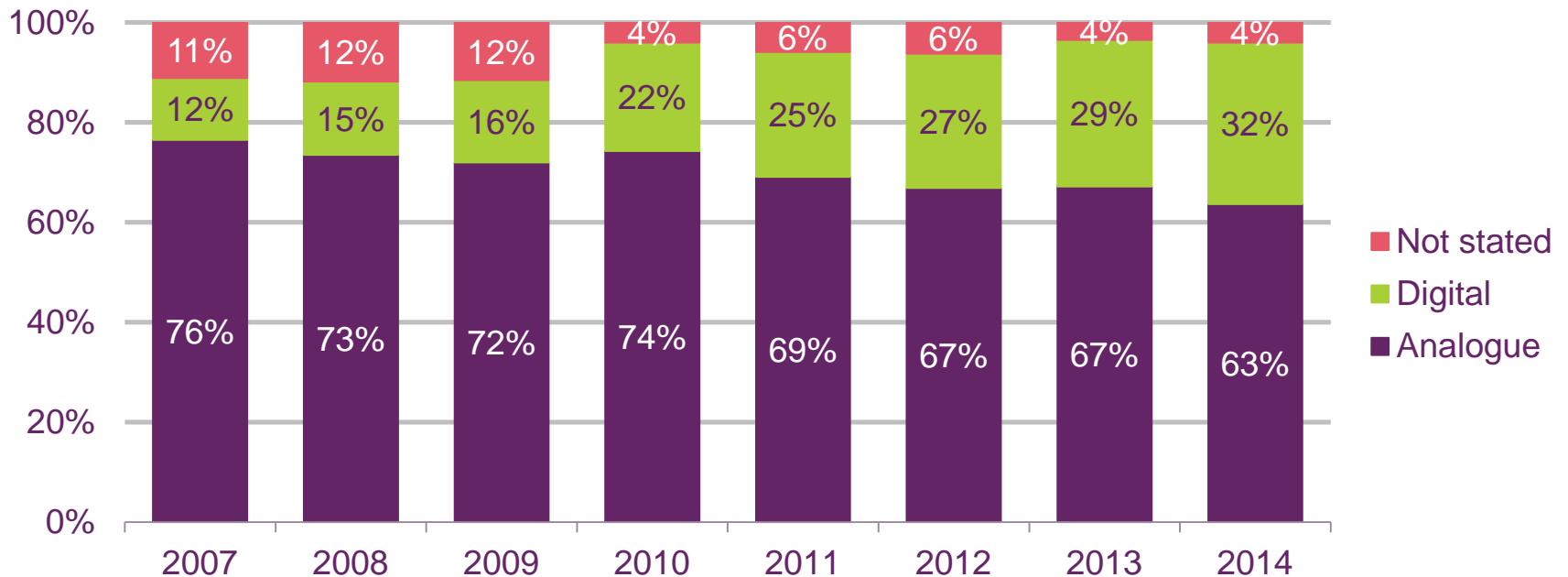
Source: RAJAR, All adults (15+), year ended Q4 2014

Note: 'Digital platforms' refers to radio services that can be accessed through a range of devices. This includes DAB digital radios, digital television, and devices that connect to the internet such as dedicated radios incorporating WiFi connectivity, home PCs, and mobile handsets which can connect to the internet.



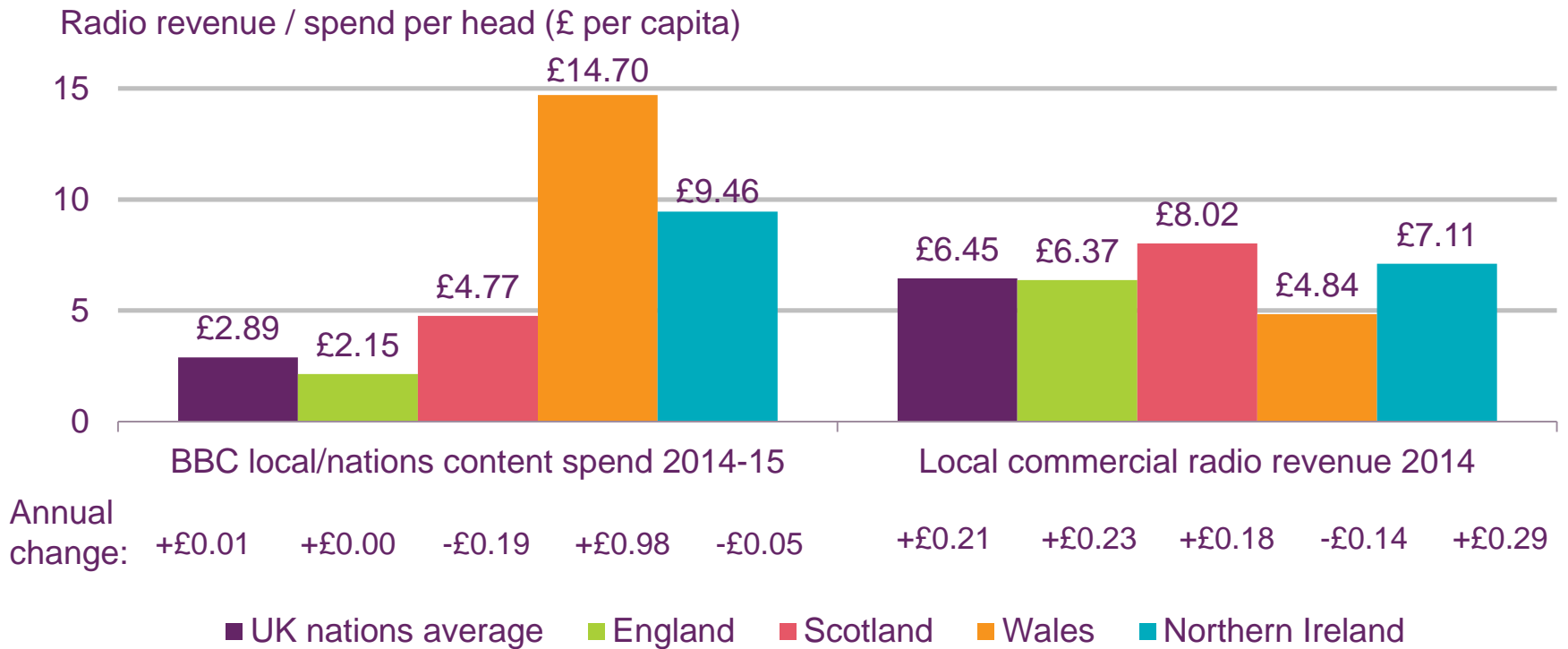
## Share of listening hours via digital and analogue platforms in Wales: 2007-2014

Share of total listening hours



Source: RAJAR, all adults, calendar years 2007-2014

# Local/nations radio spend and revenue per head of population: 2013-14



Source: Broadcasters

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT and Absolute.

# Likelihood of purchasing a DAB radio within the next year



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

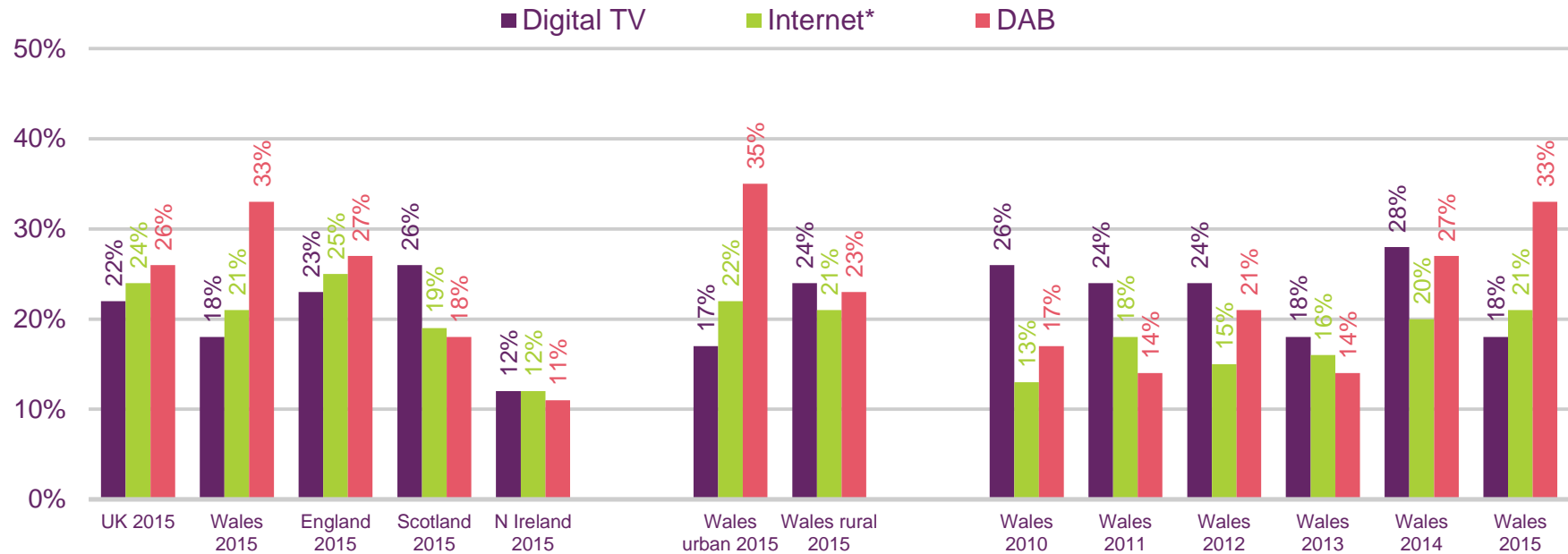
Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1690 UK, 228 Wales, 952 England, 239 Scotland, 271 Northern Ireland, 106 Wales urban, 122 Wales rural, 594 Wales 2010, 207 Wales 2011, 273 Wales 2012, 269 Wales 2013, 246 Wales 2014, 228 Wales 2015).

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. \*Caution: Low base

# Listening to radio via internet, DTV and DAB

Proportion of respondents (%) who have listened to radio via DTV, or internet



QP11. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio?/ QE5A. Which, if any, of these do you use the internet for? \*Measure for Internet combines responses across radio listeners (at QP11) and internet users (at QE5A).

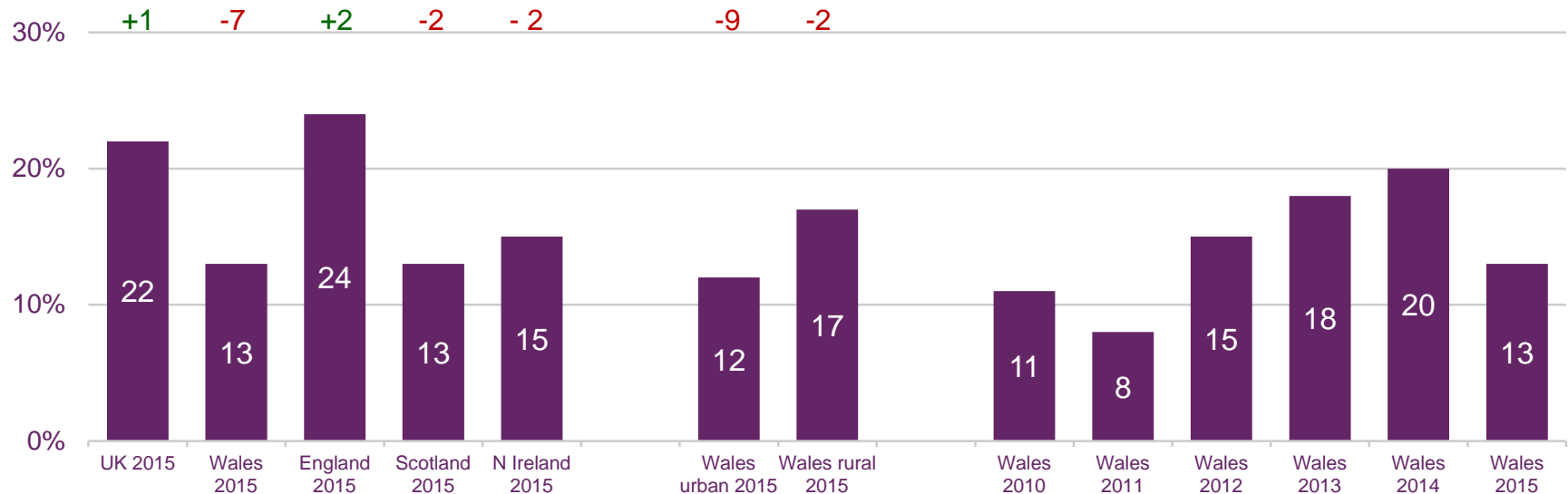
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Listening to radio on mobile phone

Proportion of respondents (%) who have used their mobile to listen to the radio

Figure above bar shows % point change in listening to radio from W1 2014



QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?/ QP11. How often, if at all, do you access the radio via mobile phone?

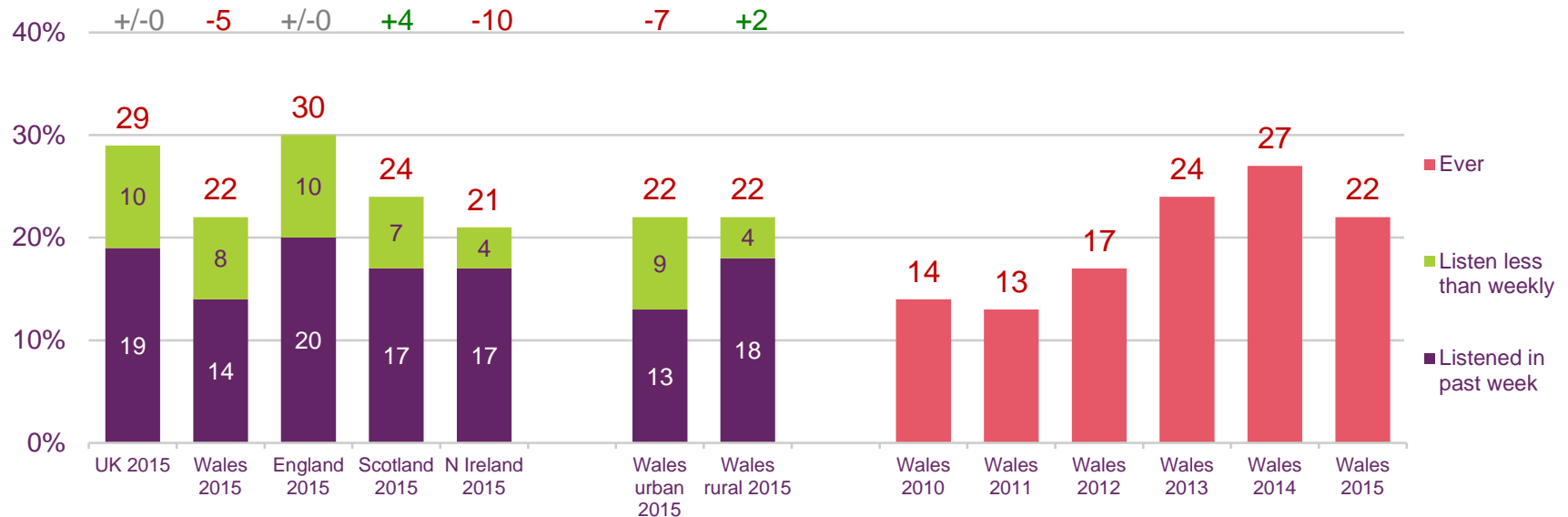
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Listening to audio content on mobile phone

Proportion of respondents (%) who have used their mobile to listen to audio content

Figure above bar shows % point change in listening to audio content from W1 2014

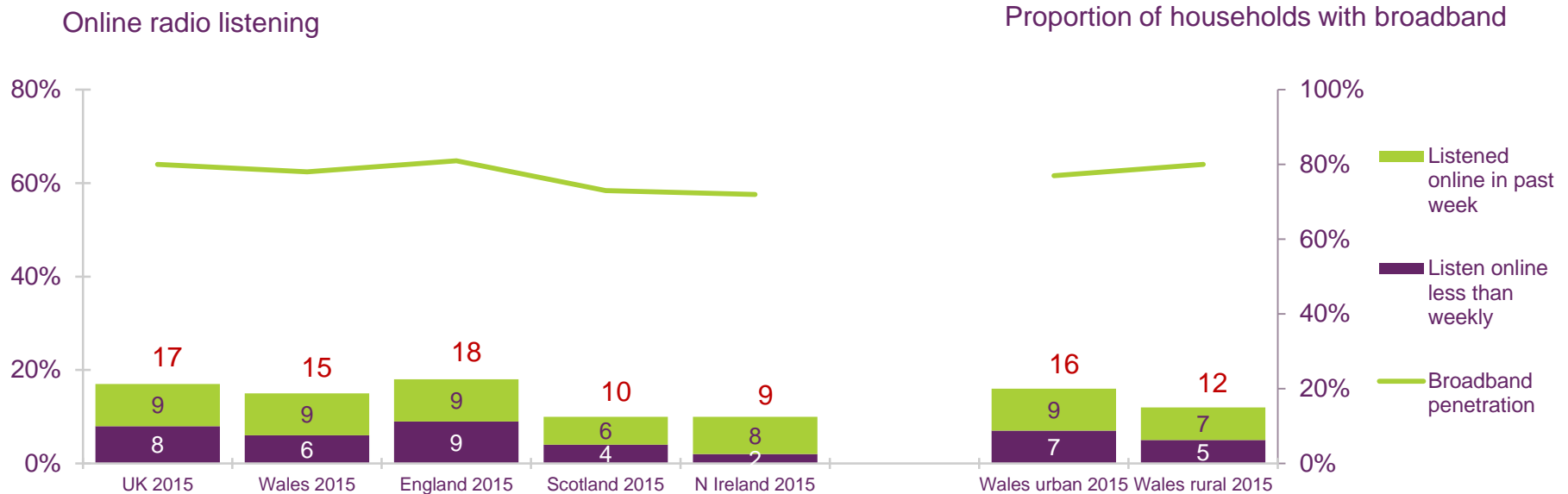


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?

Source: Ofcom Technology Tracker, Wave 1 2015

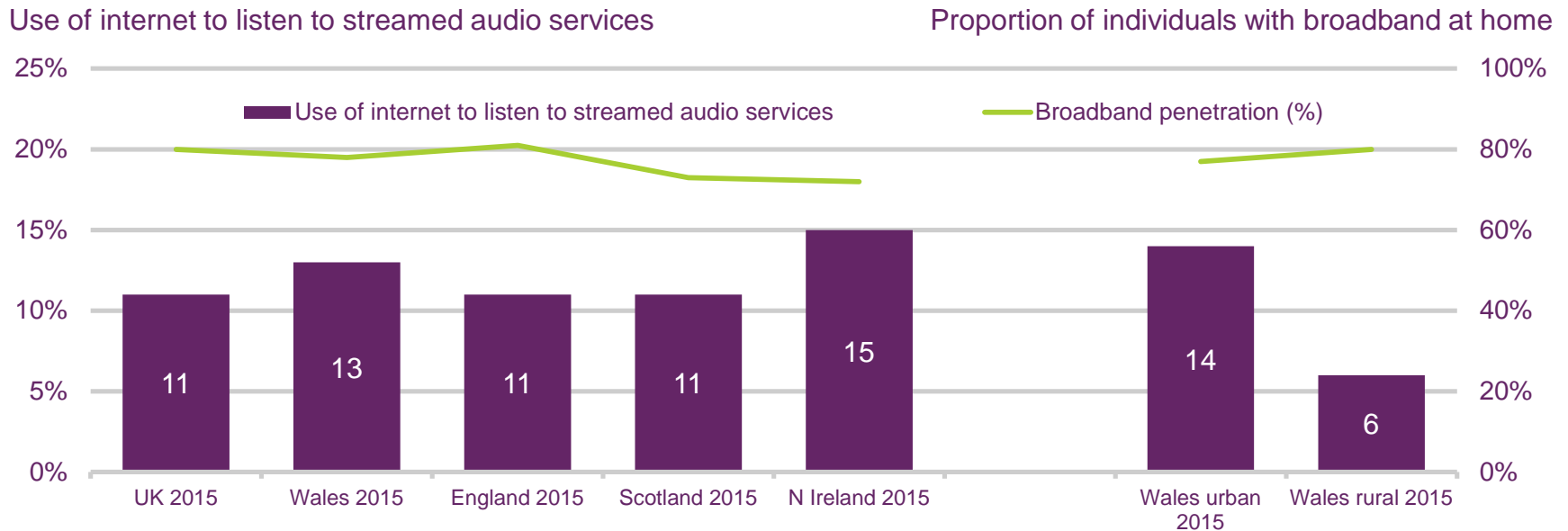
Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Proportion of adults who listen to internet radio



QE5A-B. Which, if any, of these do you use the internet for?/ And, which, if any, of these activities have you used the internet for in the last week? Source: Ofcom Technology Tracker, Wave 1 2015  
 Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural)

# Use of internet for listening to streamed audio services



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

Source: Ofcom Technology Tracker, Wave 1 2015

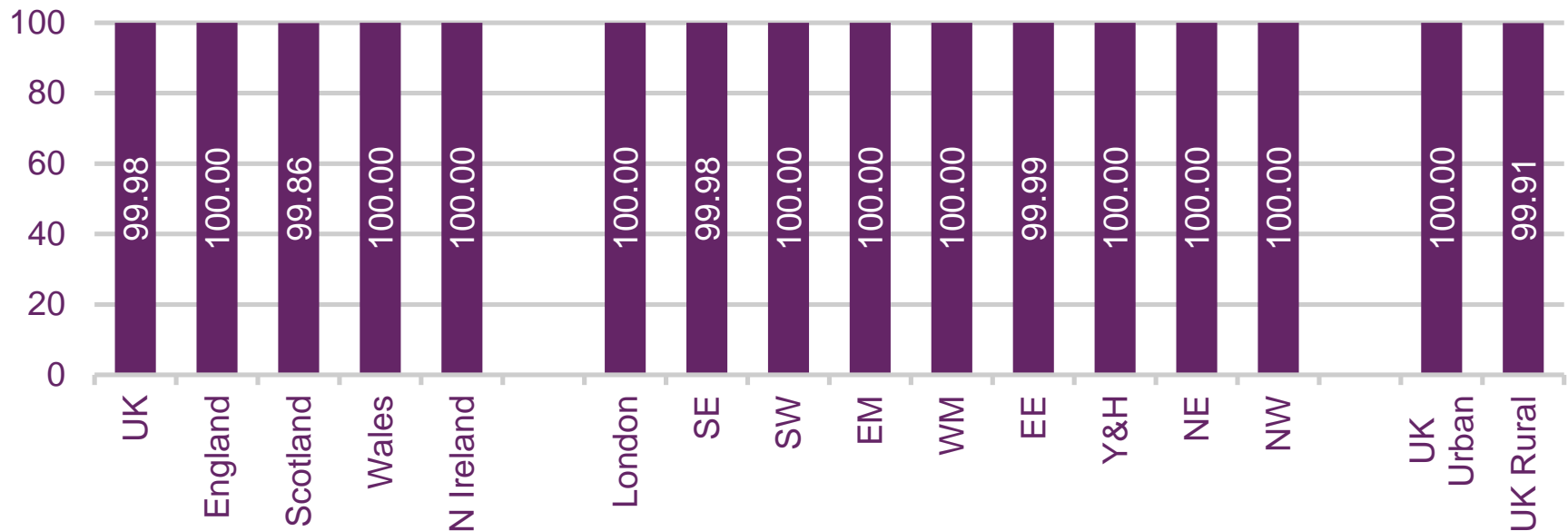
Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural)



# Telecoms and networks

# Proportion of premises connected to an ADSL-enabled BT exchange

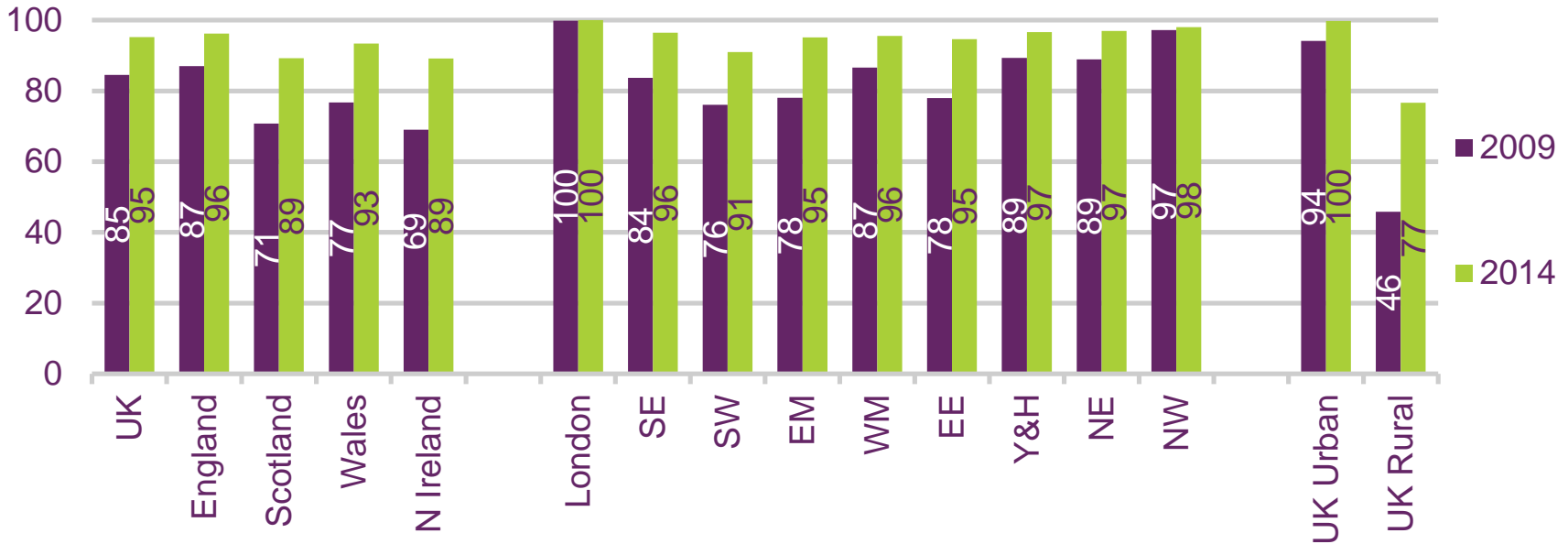
Proportion of premises (per cent)



Source: Ofcom / BT, December 2014 data

# Proportion of premises in connected to an unbundled local exchange

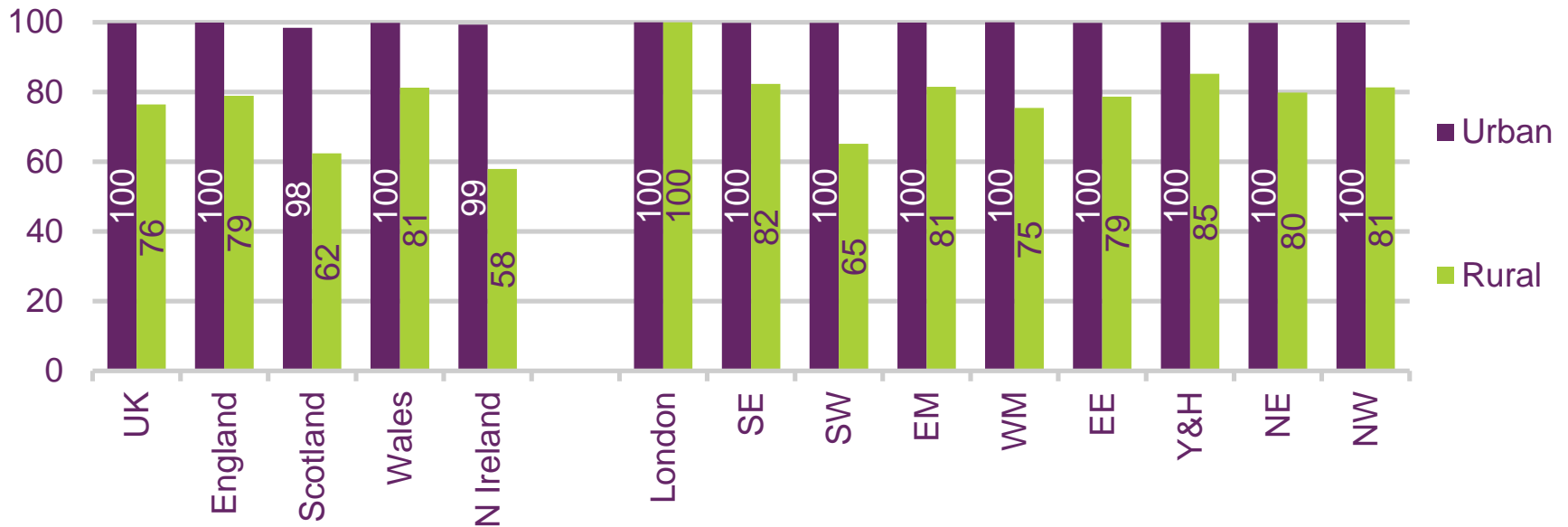
Proportion of premises (per cent)



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

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

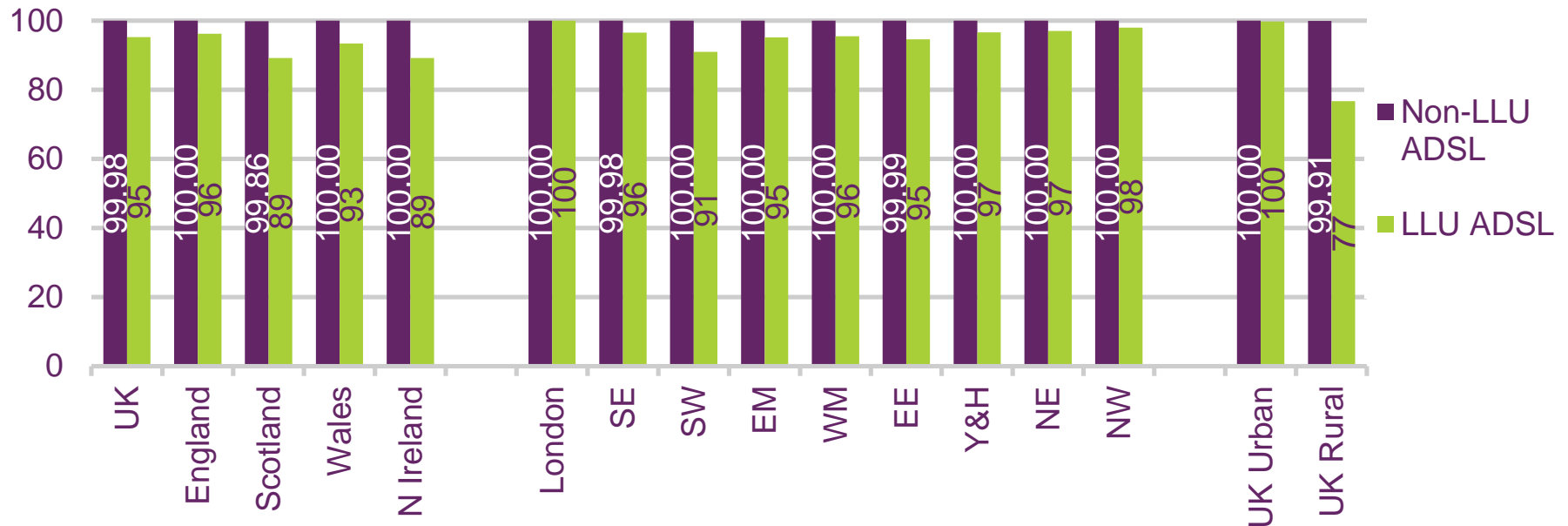
Proportion of premises (per cent)



Source: Ofcom / BT, December 2014 data

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

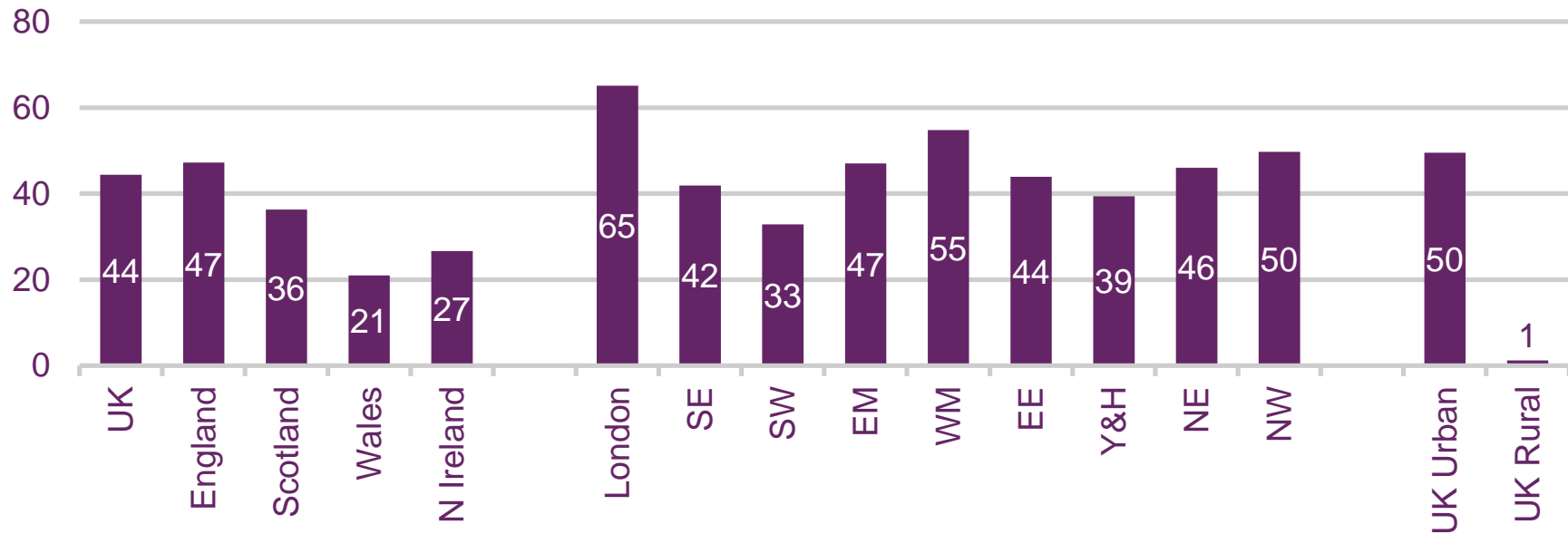
Proportion of premises (per cent)



Source: Ofcom / BT, December 2014 data

# Proportion of premises able to receive Virgin Media cable broadband services

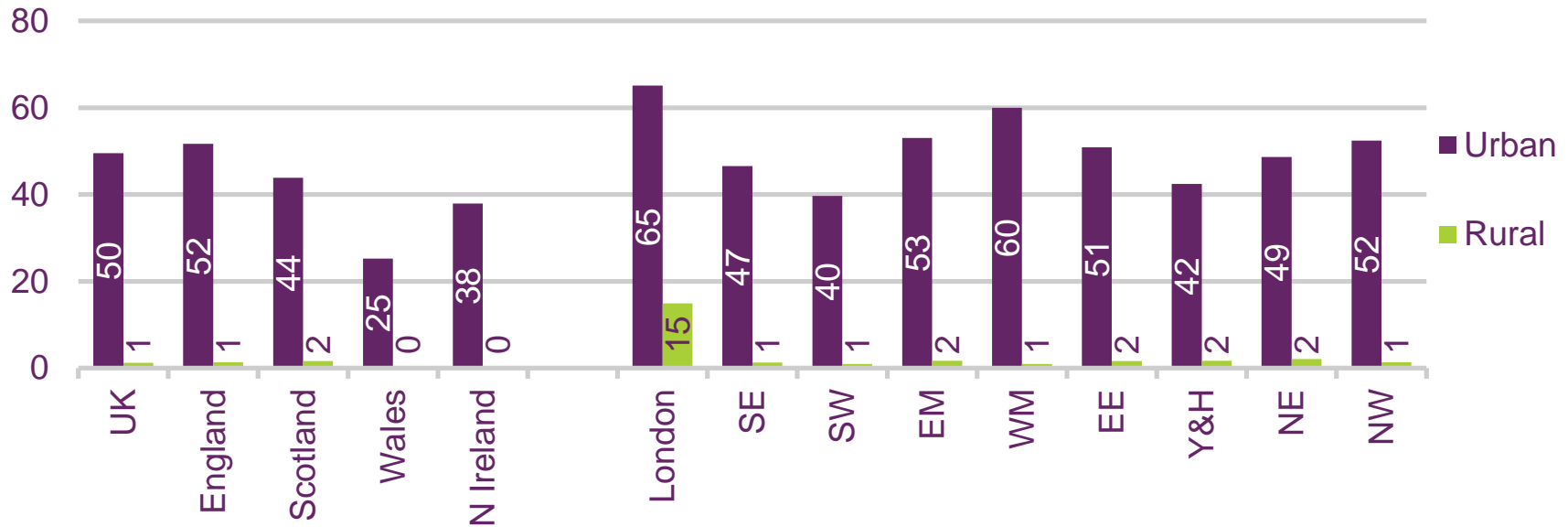
Proportion of premises (per cent)



Source: Ofcom / Virgin Media, May 2015 data

# Proportion of premises in urban and rural areas able to receive Virgin Media cable broadband services

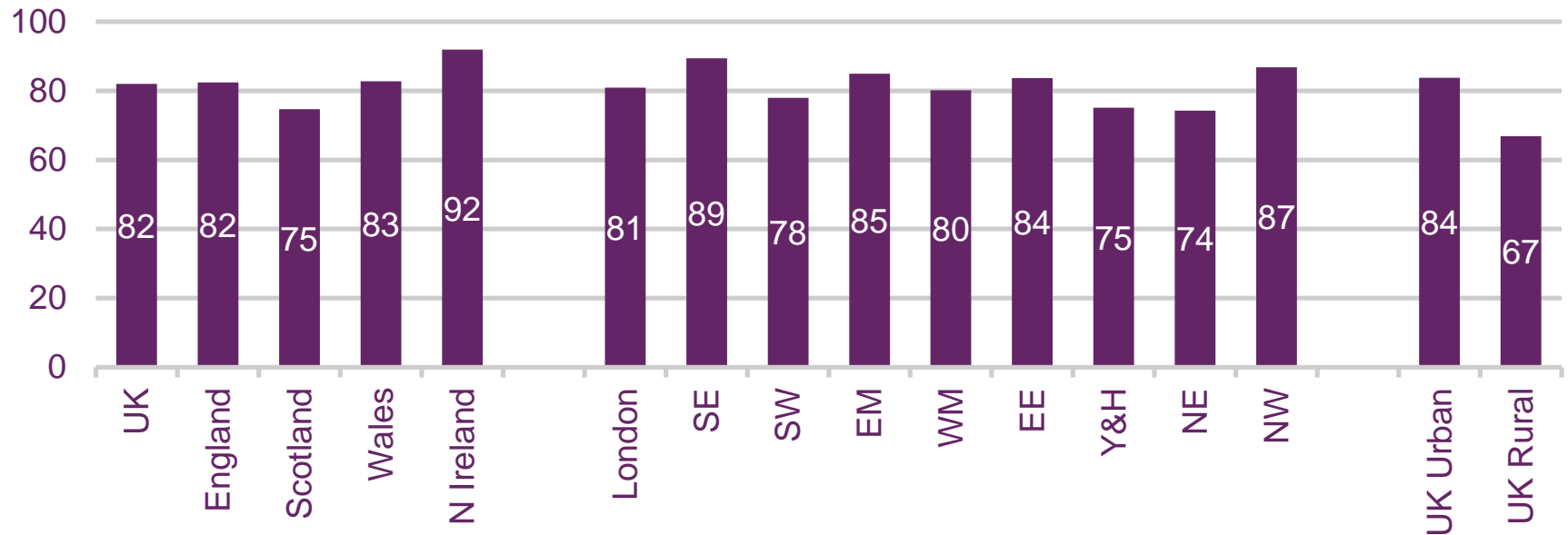
Proportion of premises (per cent)



Source: Ofcom / Virgin Media, May 2015 data

# Proportion of premises able to receive BT Openreach/Kcom fibre broadband services

Proportion of premises (per cent)

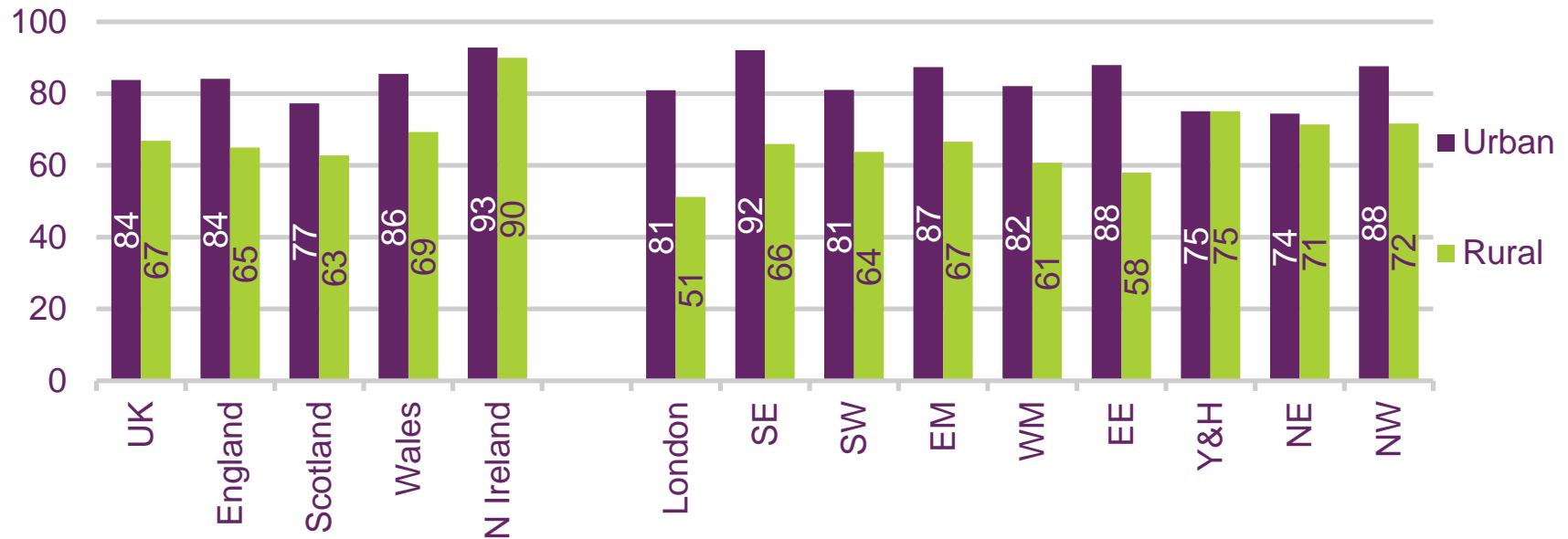


Source: Ofcom / operators, May 2015 data



# Proportion of premises in urban and rural areas able to receive BT Openreach/Kcom fibre broadband services

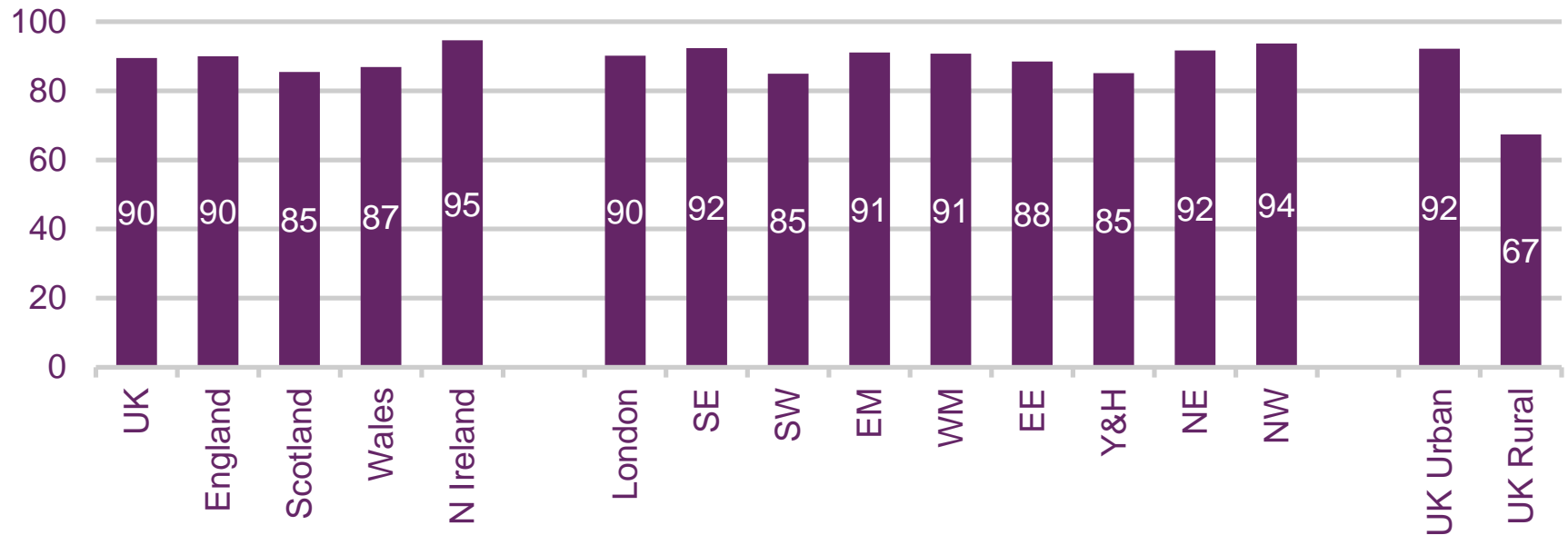
Proportion of premises (per cent)



Source: Ofcom / operators, May 2015 data

# Proportion of premises able to receive NGA broadband services

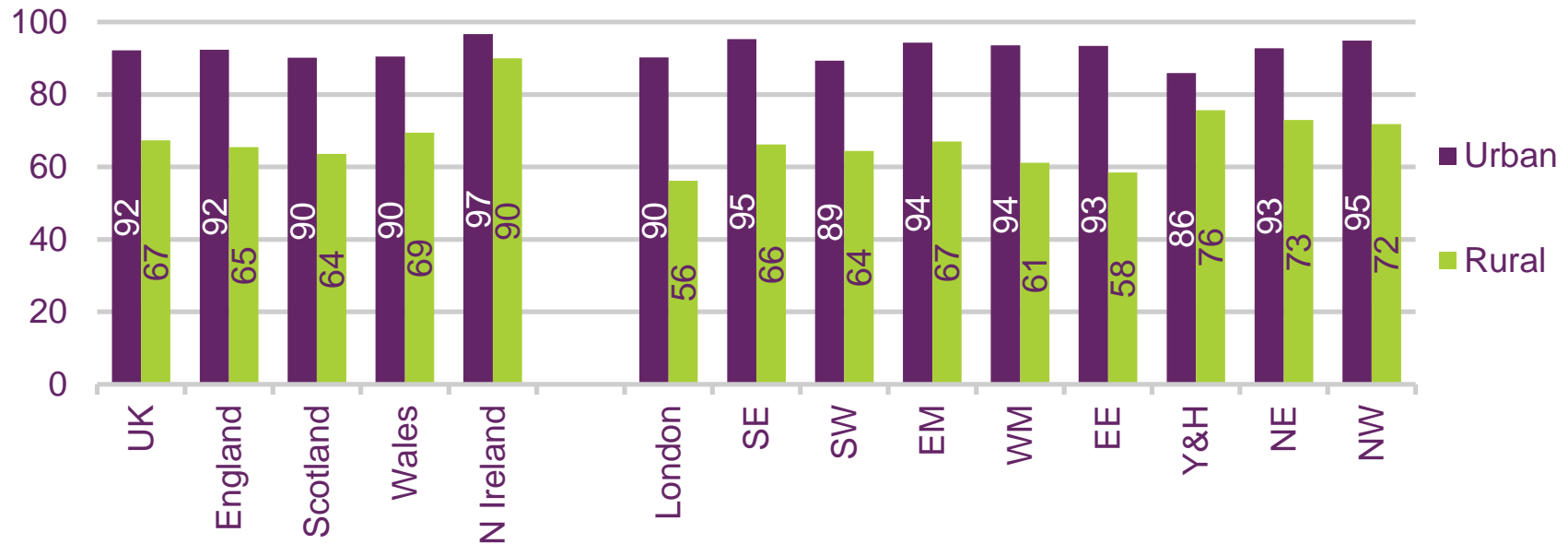
Proportion of premises (per cent)



Source: Ofcom / operators, May 2015 data

# Proportion of premises in urban and rural areas able to receive NGA broadband services

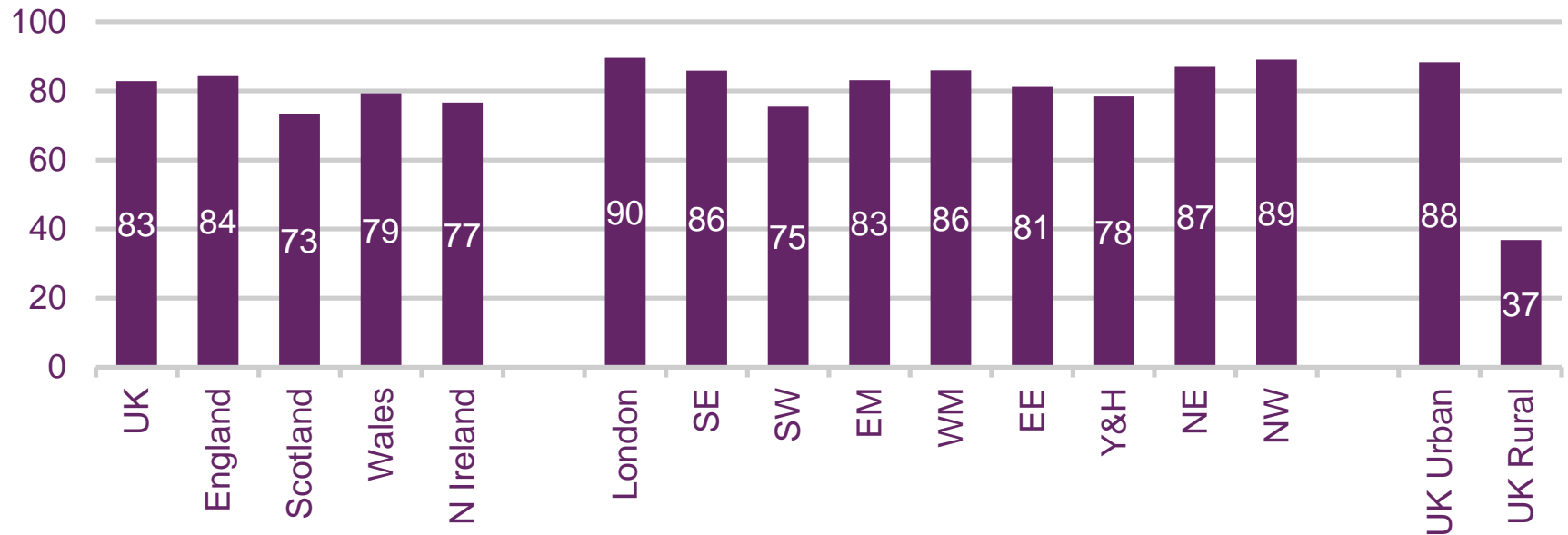
Proportion of premises (per cent)



Source: Ofcom / operators, May 2015 data

# Proportion of premises able to receive superfast broadband services

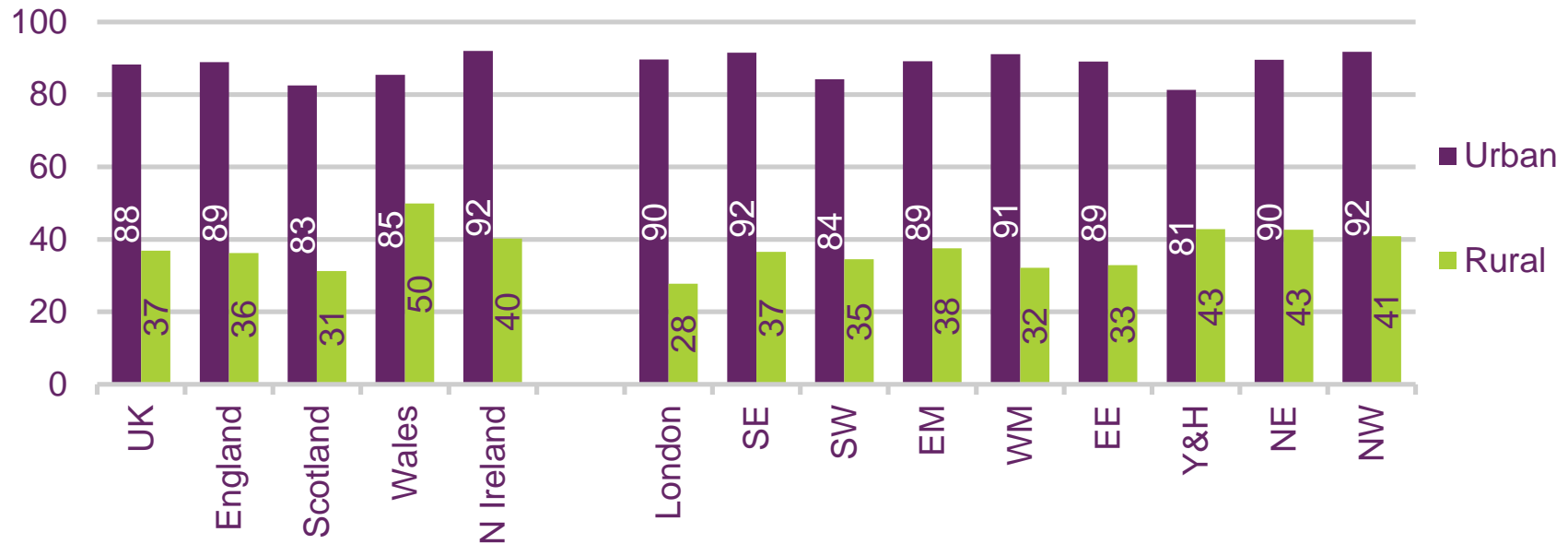
Proportion of premises (per cent)



Source: Ofcom / operators, May 2015 data

# Proportion of premises in urban and rural areas able to receive superfast broadband services

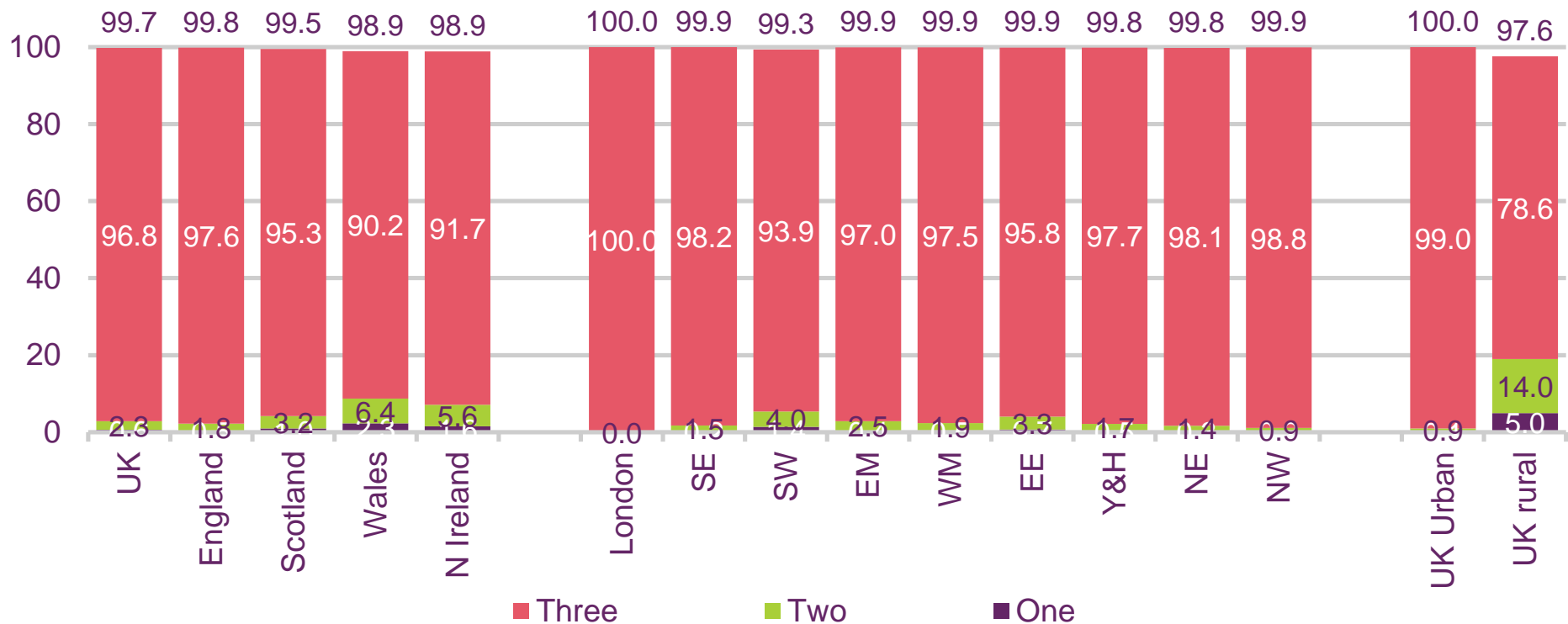
Proportion of premises (per cent)



Source: Ofcom / operators, May 2015 data

# 2G outdoor mobile coverage to premises, by number of operators

Proportion of premises (per cent)

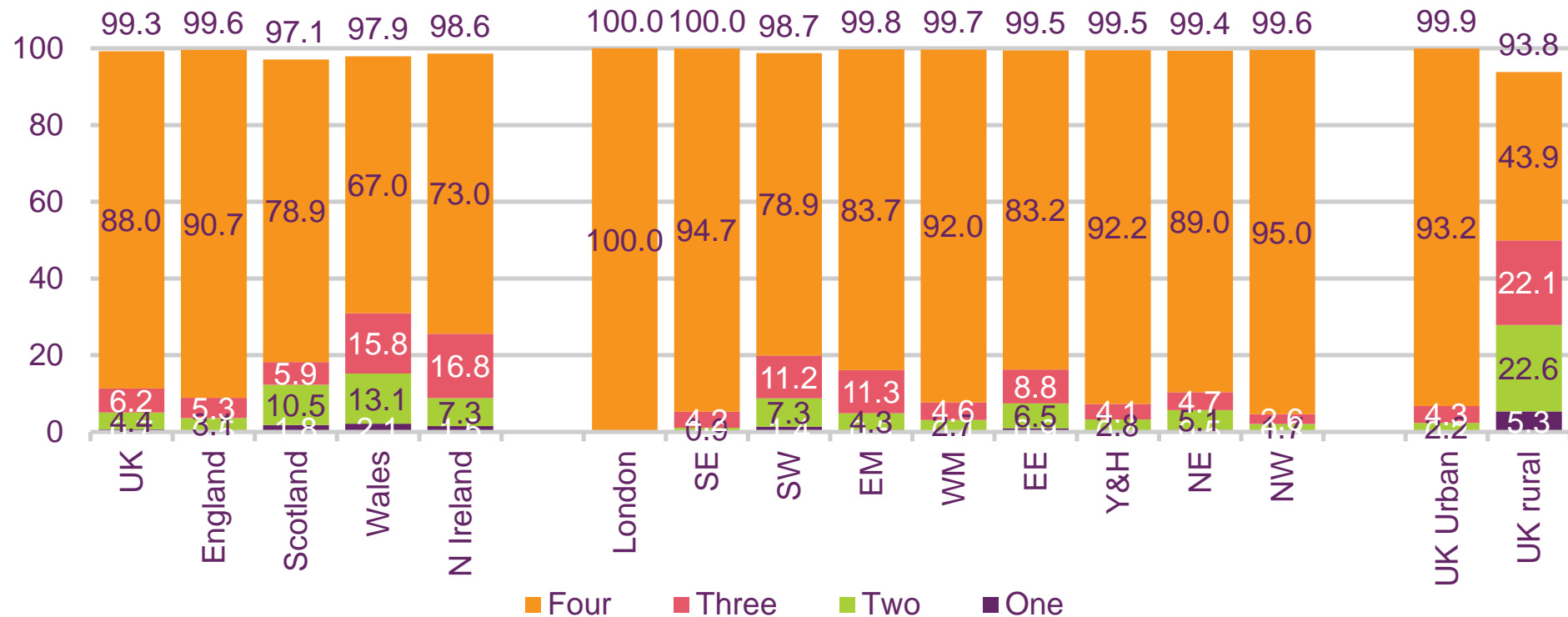


Source: Ofcom based on operator data, May 2015 data

Note: Coverage is based on 100m square pixels covering the UK using an enhanced methodology

# 3G outdoor mobile coverage to premises, by number of operators

Proportion of premises (per cent)

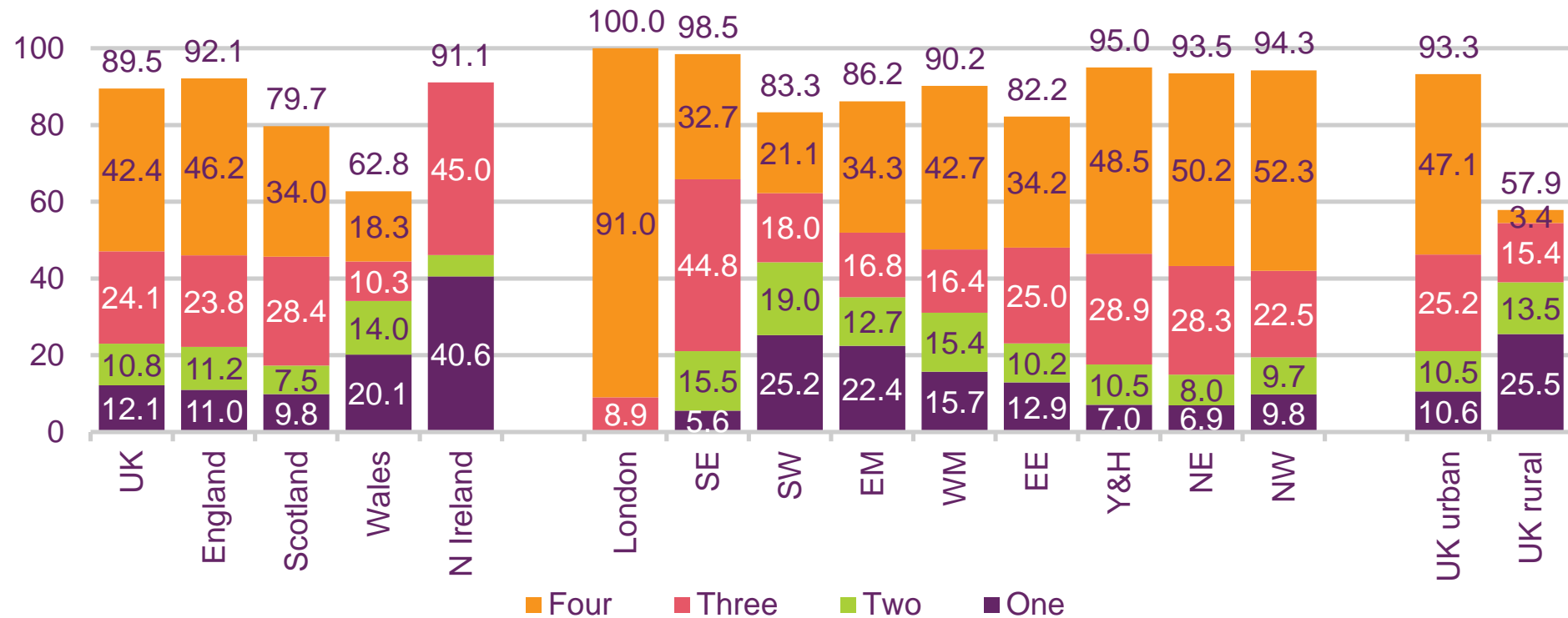


Source: Ofcom based on operator data, May 2015 data

Note: Coverage is based on 100m square pixels covering the UK using an enhanced methodology

# 4G outdoor mobile coverage to premises, by number of operators

Proportion of premises (per cent)



Source: Ofcom based on operator data, May 2015 data

Note: Coverage is based on 100m square pixels covering the UK using an enhanced methodology



## Take-up of communications services, 2015

		UK	Wales	England	Scotland	N Ireland	Wales urban	Wales rural
<b>Individual</b>								
<b>Voice telephony</b>	Fixed Line	<b>84%</b>	83%	85%	82%	84%	82%	85%
	Mobile phone	<b>93%</b>	90%	93%	91%	91%	90%	89%
	Smartphone	<b>66%</b>	63%	67%	63%	63%	64%	59%
<b>Internet</b>	Computer (any type)	<b>83%</b>	84%	84%	75%	77%	84%	83%
	Tablet computer	<b>54%</b>	60%	54%	52%	54%	62%	54%
	Total Internet <sup>1</sup>	<b>85%</b>	86%	86%	78%	79%	86%	85%
	Broadband (fixed & mobile) <sup>2</sup>	<b>80%</b>	78%	81%	73%	72%	77%	80%
	Fixed Broadband	<b>78%</b>	77%	79%	71%	69%	76%	79%
	Mobile internet <sup>4</sup>	<b>61%</b>	59%	62%	59%	60%	60%	51%

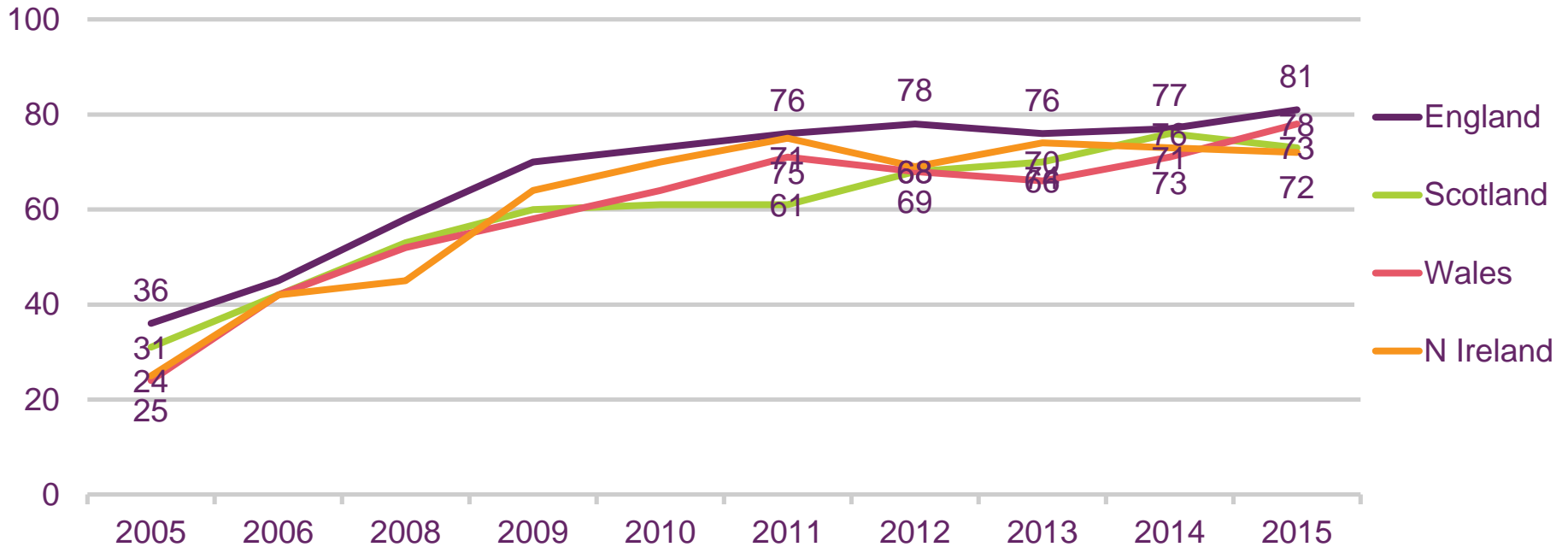
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QD24B. Do you personally use a smartphone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the Internet/ 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?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 967

# Broadband take-up

Take up (% of homes)



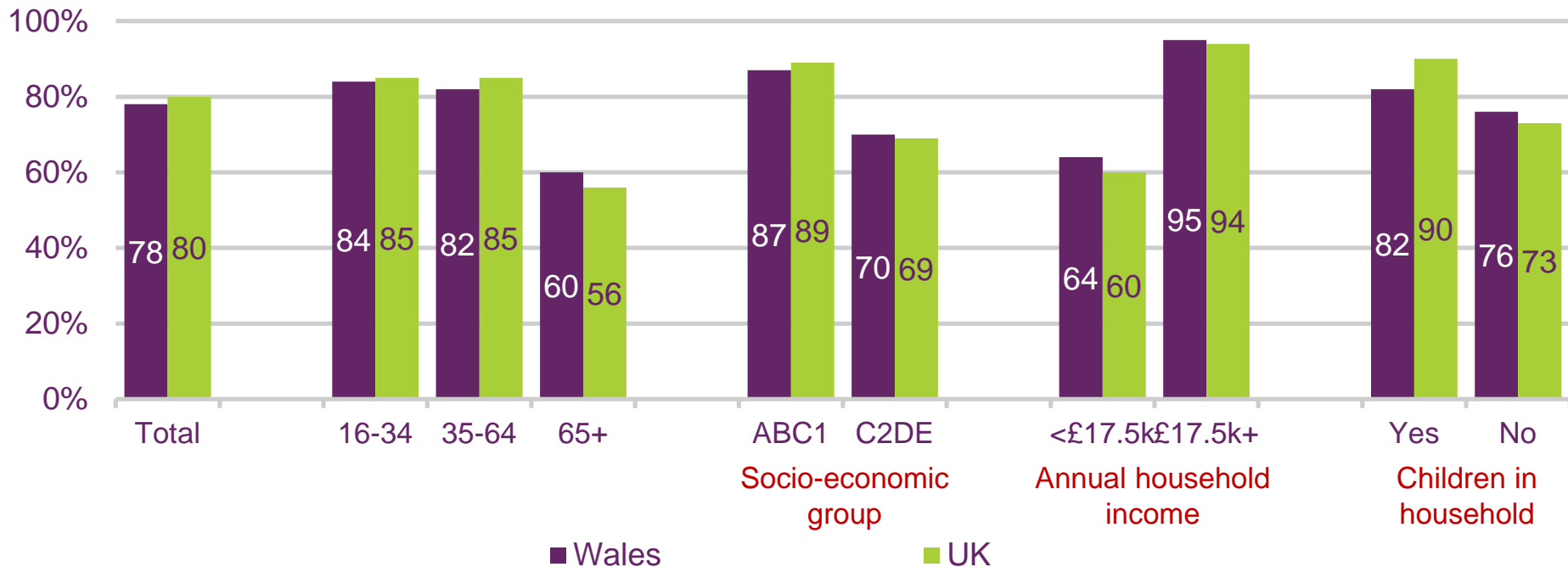
QE9. Which of these methods does your household use to connect to the internet at home?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (2264 England, 492 Scotland, 496 Wales, 504 Northern Ireland)

# Consumer broadband take-up in Wales, by demographic

Proportion of respondents (%)



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

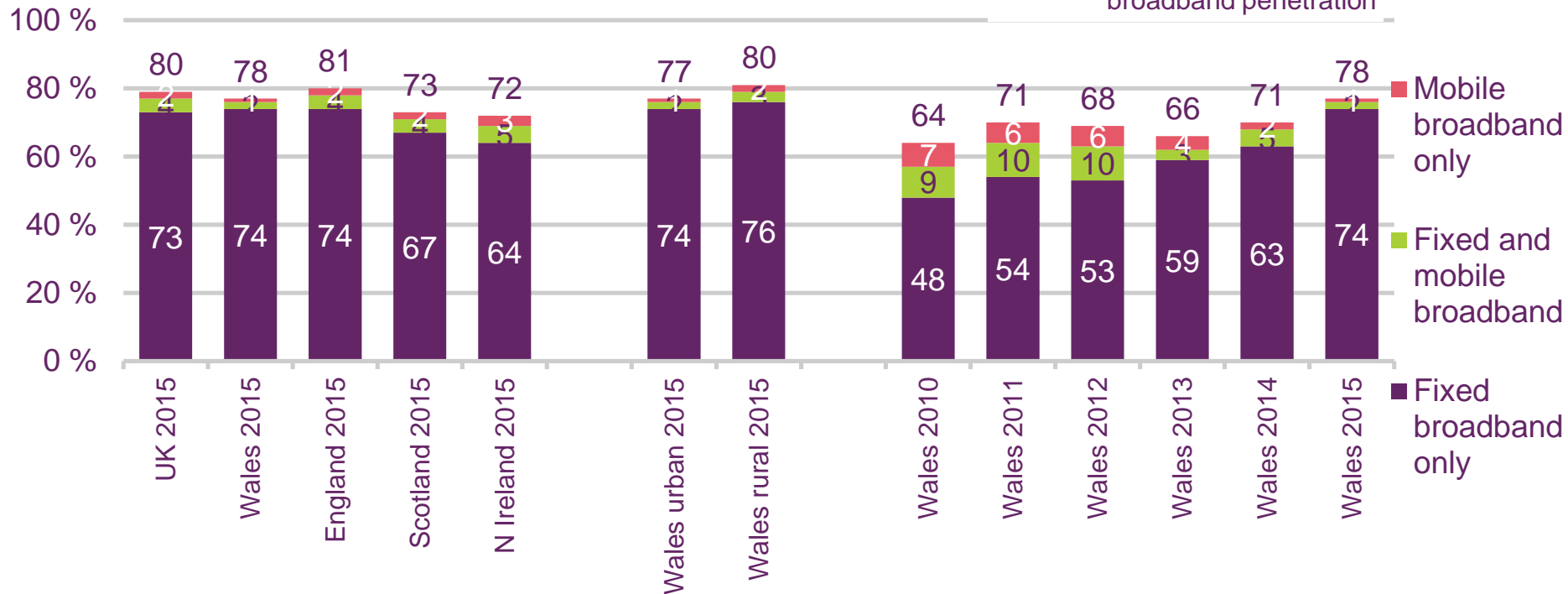
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n =496 Wales, 128 16-34s, 242 35-64s, 126 65+, 260 ABC1, 236 C2DE, 158 <£17.5k income, 116 £17.5k+, 152 children in home, 344 no children in home)

# Consumer broadband, by connection type

Proportion of homes (%)

Figure above bar shows total broadband penetration



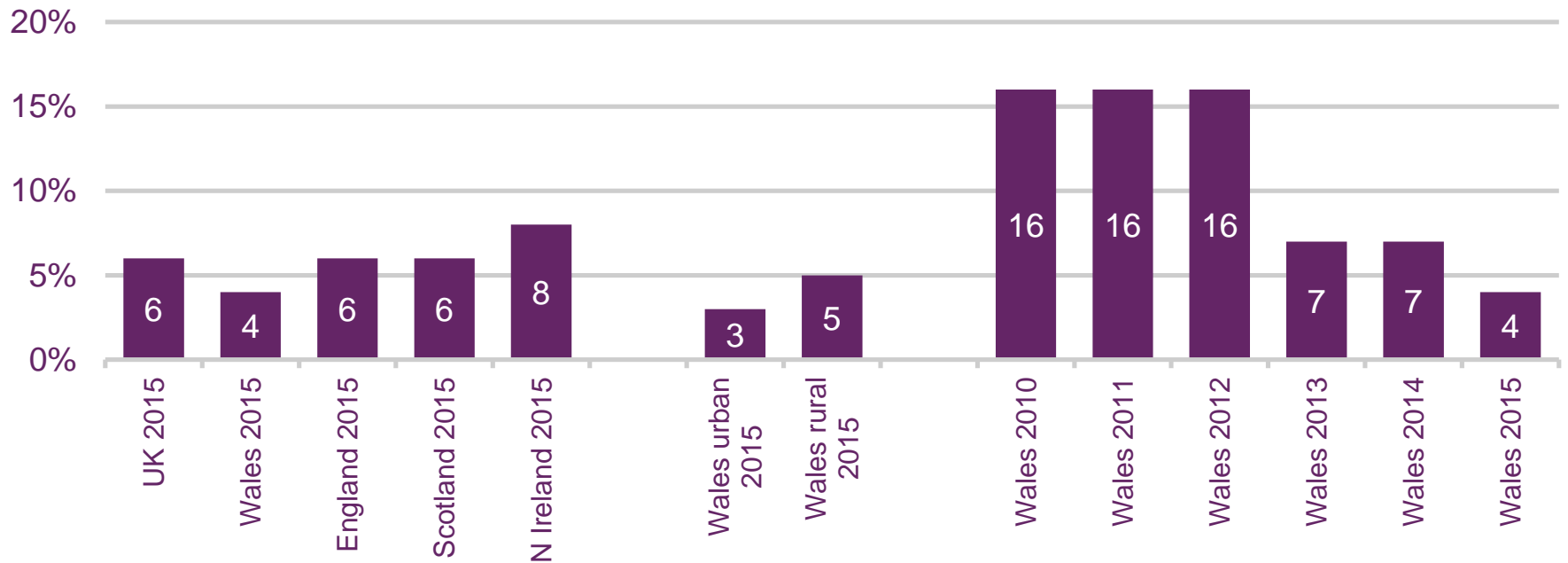
QE9. Which of these methods does your household use to connect to the internet at home?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Mobile broadband take-up

Proportion of respondents (%)



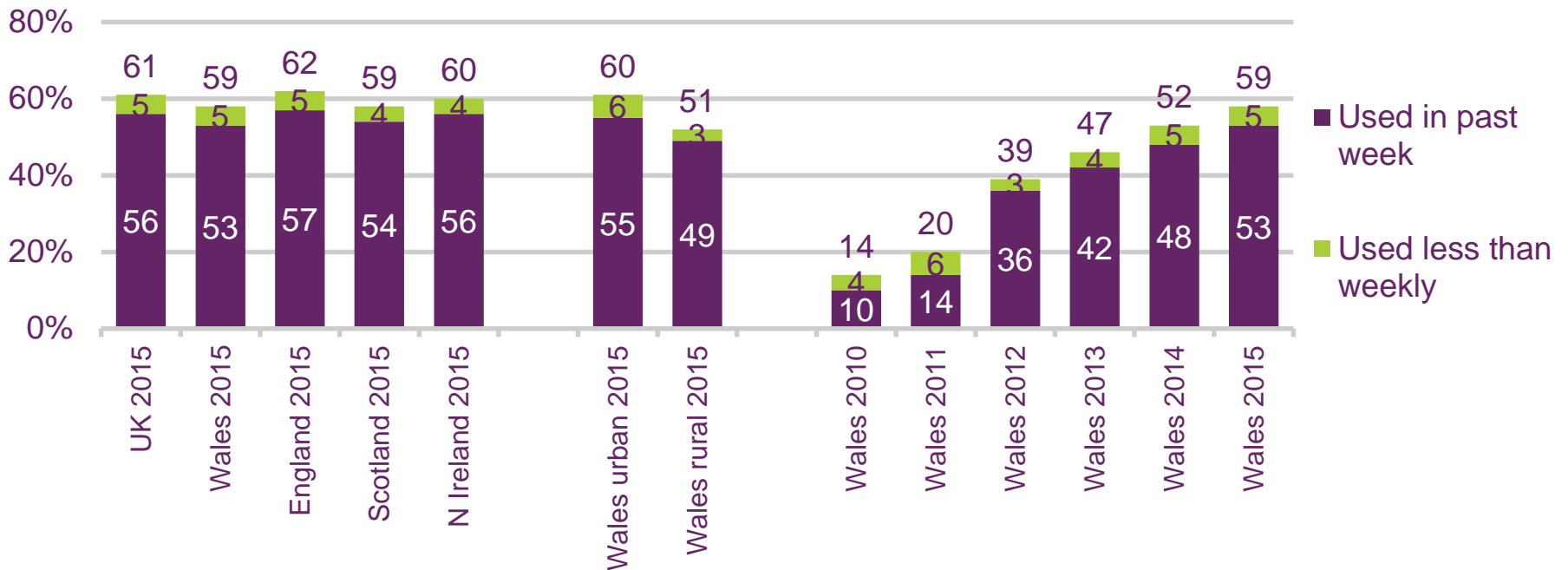
QE9. Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

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

Proportion of respondents



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

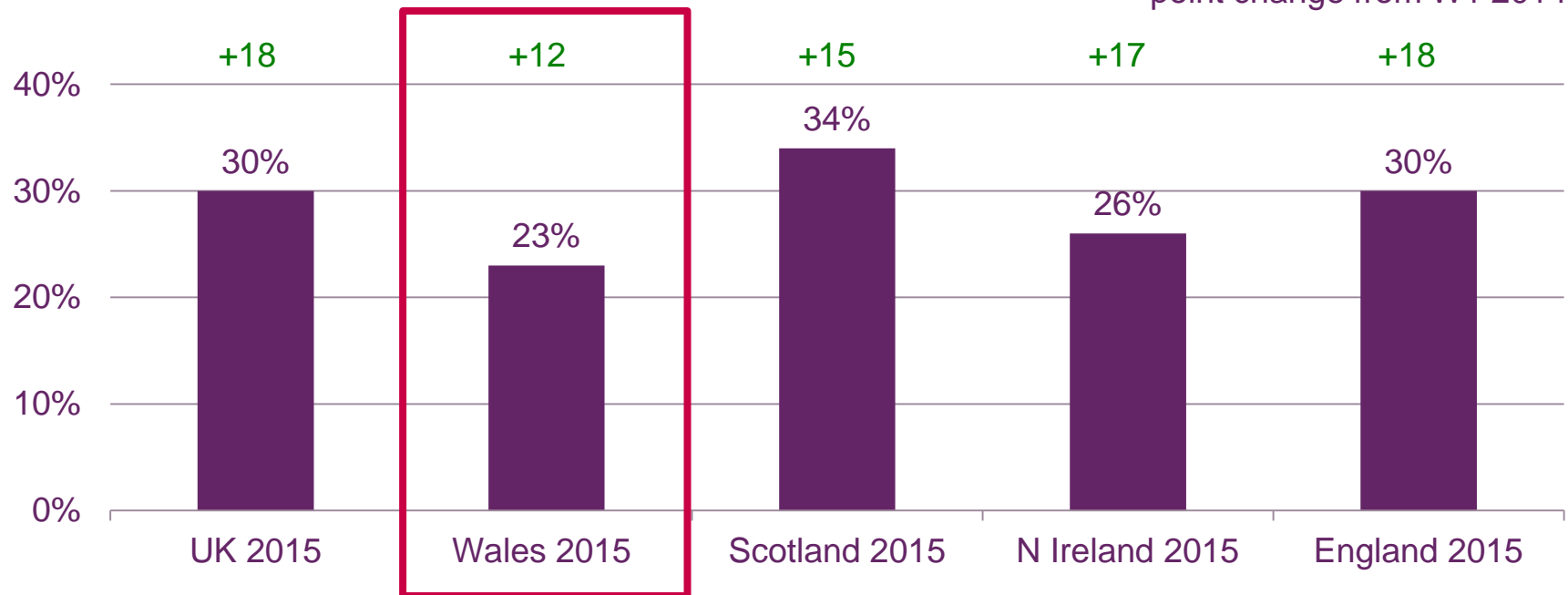
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# 4G take-up, by nation

Proportion of respondents (%)

Figure above bar shows % point change from W1 2014



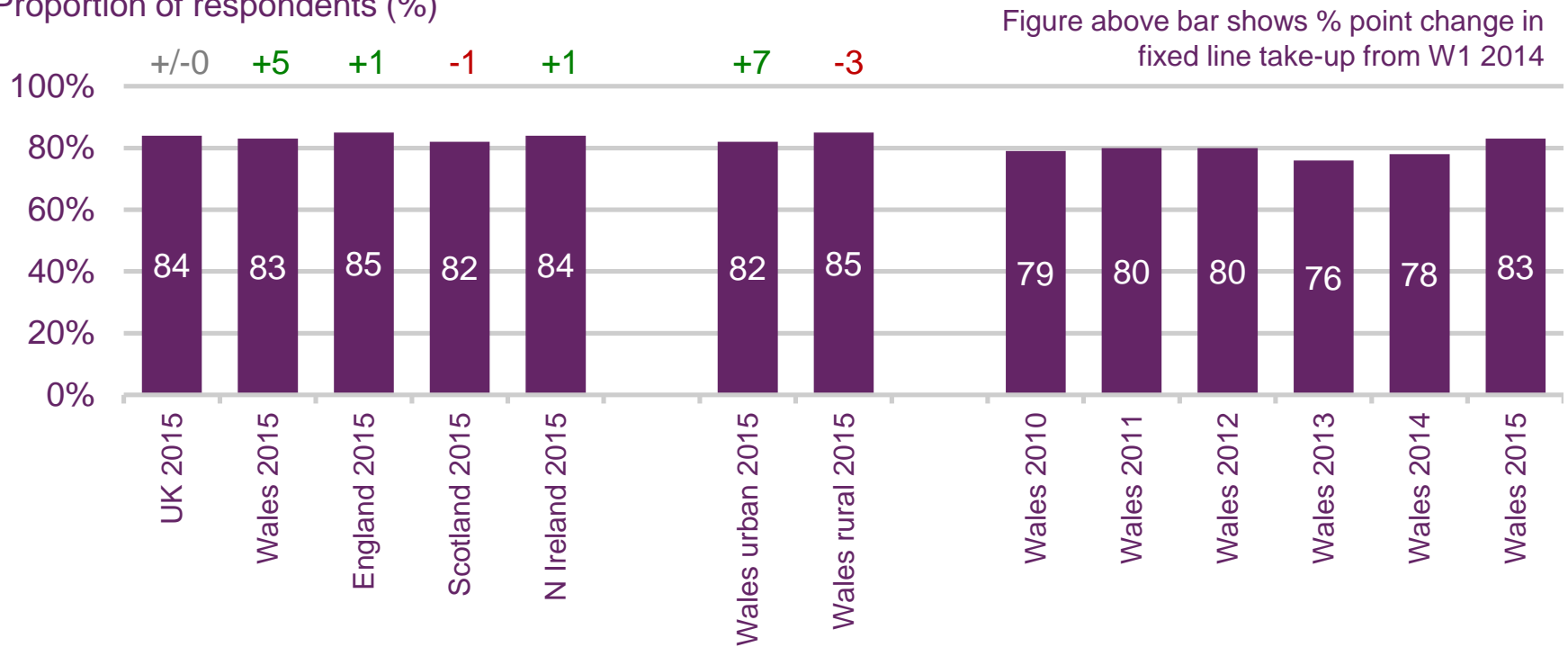
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 438 Northern Ireland, 2264 England, 492 Scotland, 496 Wales

QD6 (QD41). Do you have a 4G service? This is a relatively new service that enables faster mobile internet access

# Fixed line take-up

Proportion of respondents (%)



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

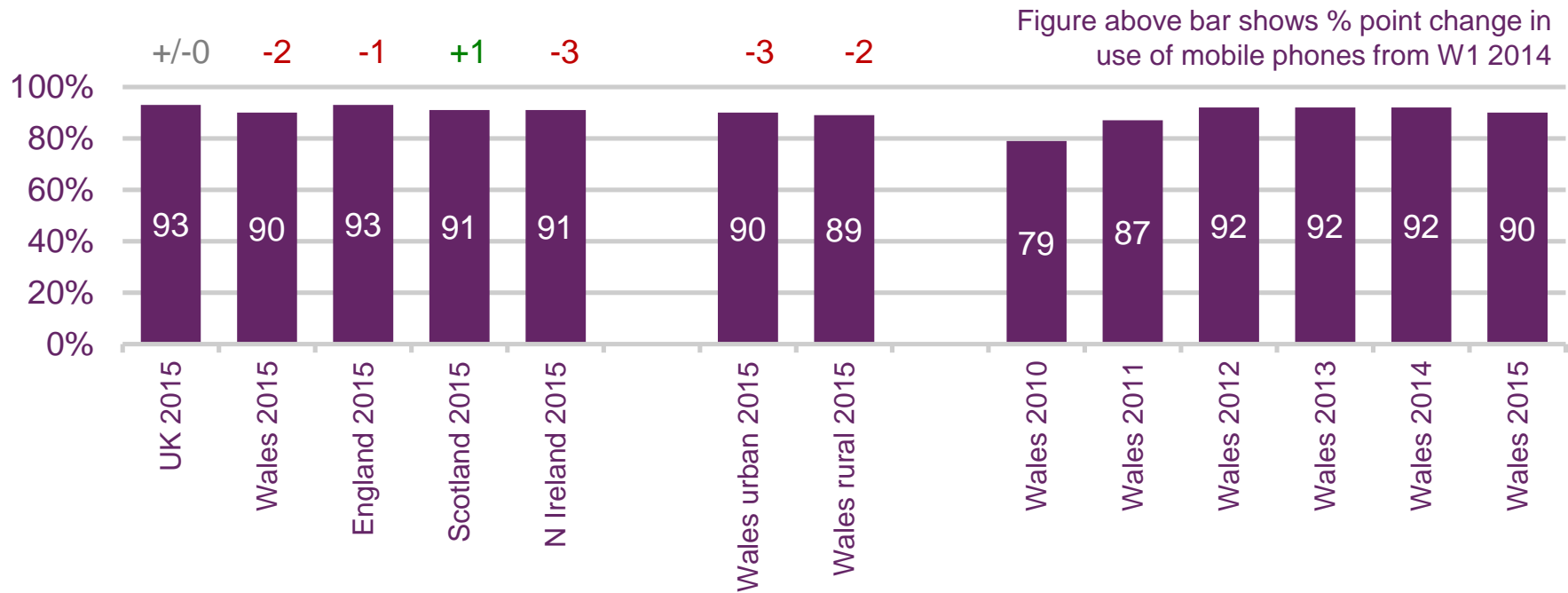
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)



# Mobile take-up

Proportion of respondents (%)

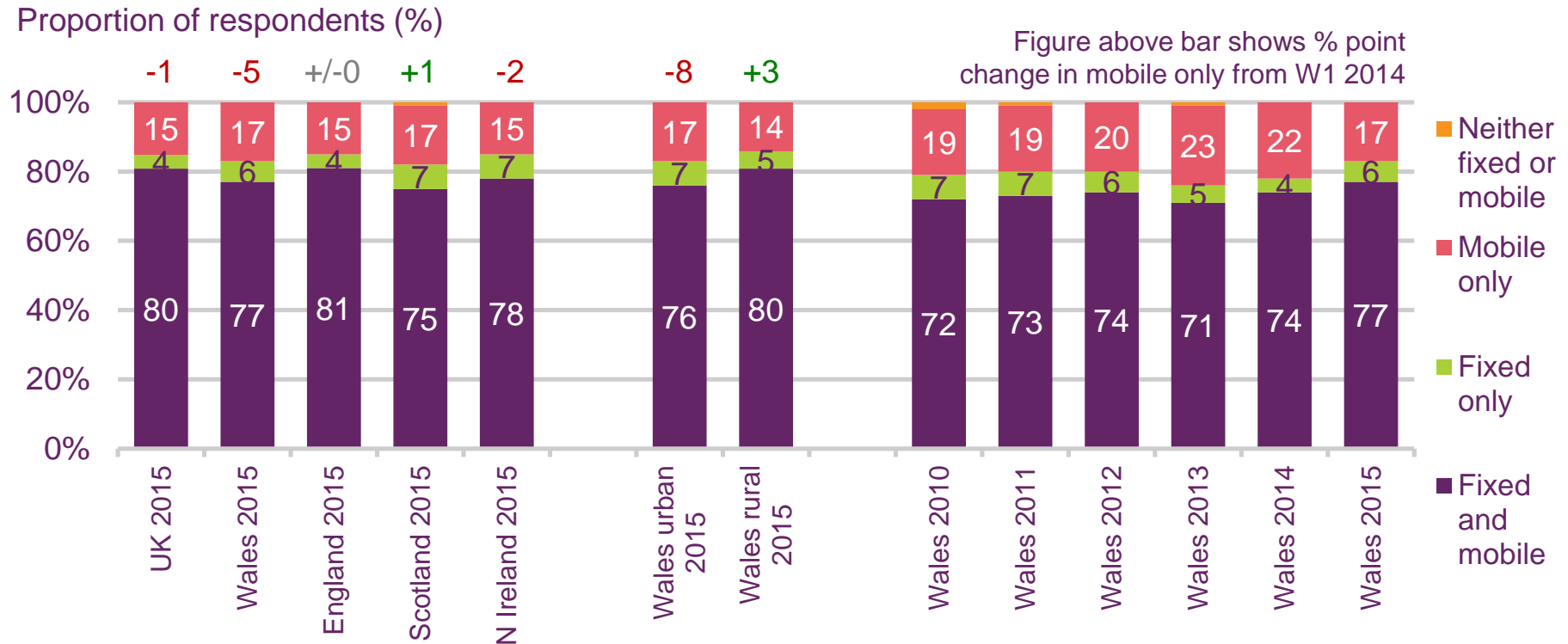


QD2. Do you personally use a mobile phone?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Cross-ownership of household telephony services

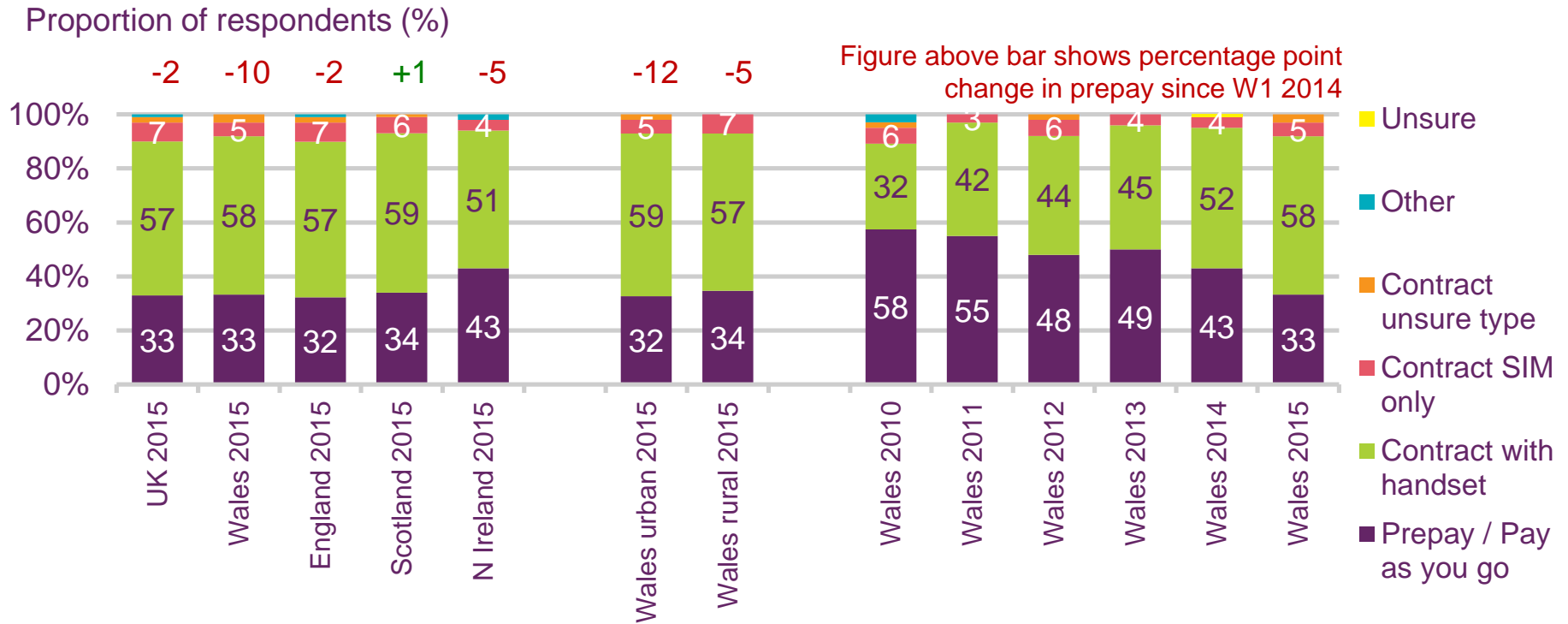


QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Type of mobile subscription

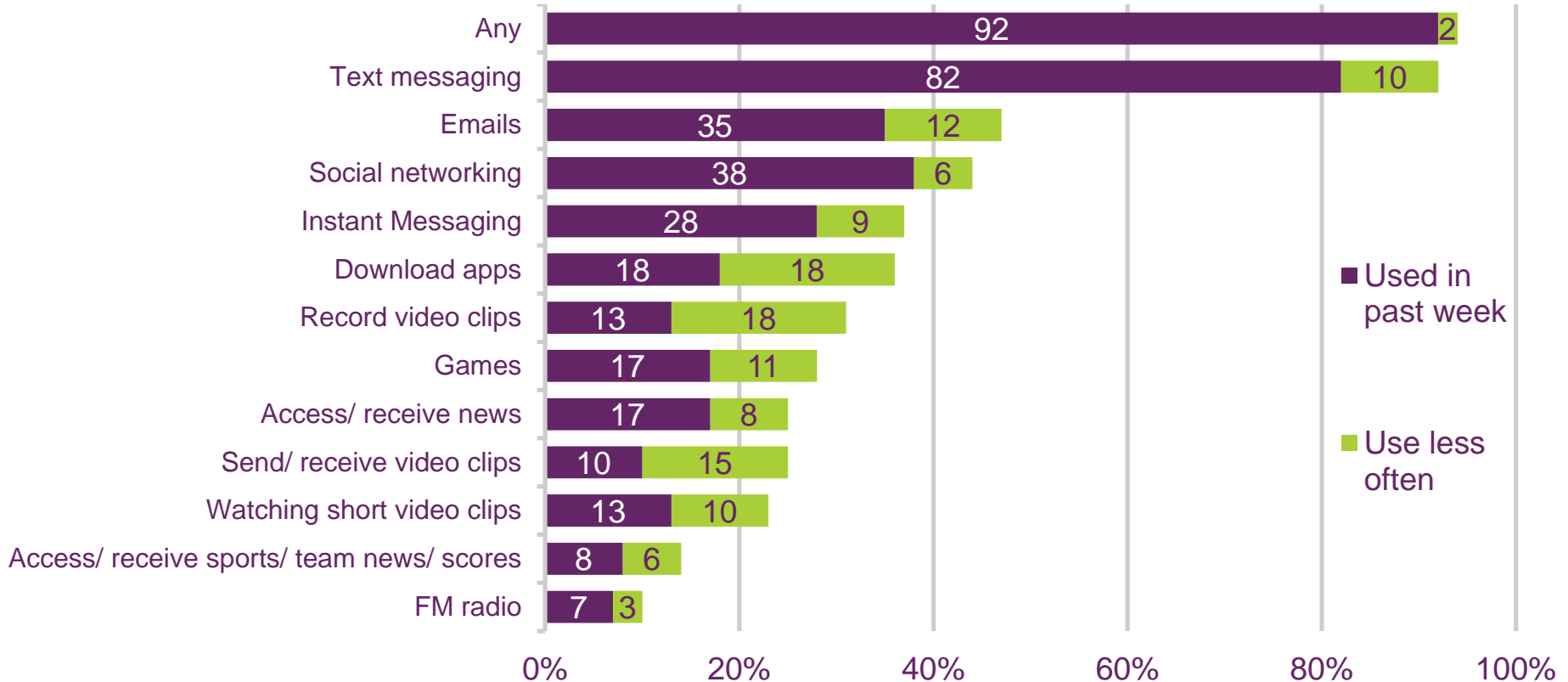


QD11. Which of these best describes the mobile package you personally use most often?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 439 Wales, 2080 England, 450 Scotland, 456 Northern Ireland, 221 Wales urban, 218 Wales rural, 923 Wales 2010, 416 Wales 2011, 456 Wales 2012, 440 Wales 2013, 438 Wales 2014, 439 Wales 2015)

# Use of mobile applications

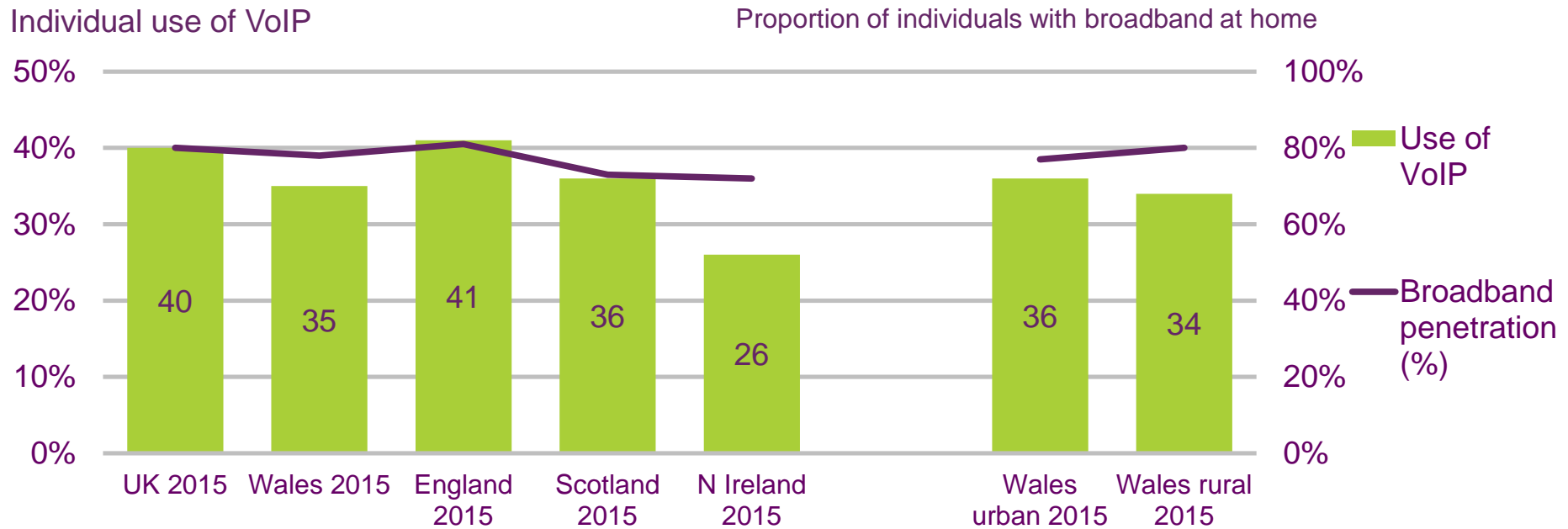


QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who personally use a mobile phone (n= 439 Wales 2015)

# Individual use of Voice over IP



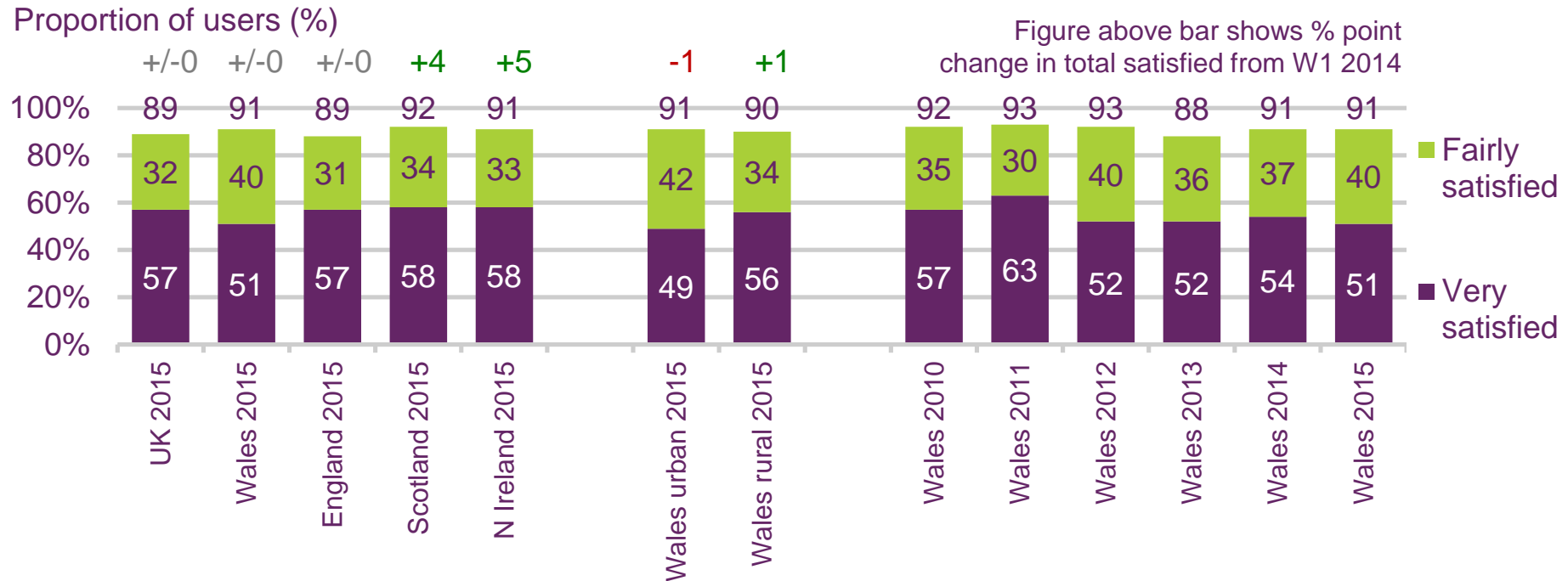
QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?/QE5.

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

Source: Ofcom Technology Tracker, Wave 1 2015

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

# Overall satisfaction with fixed line services



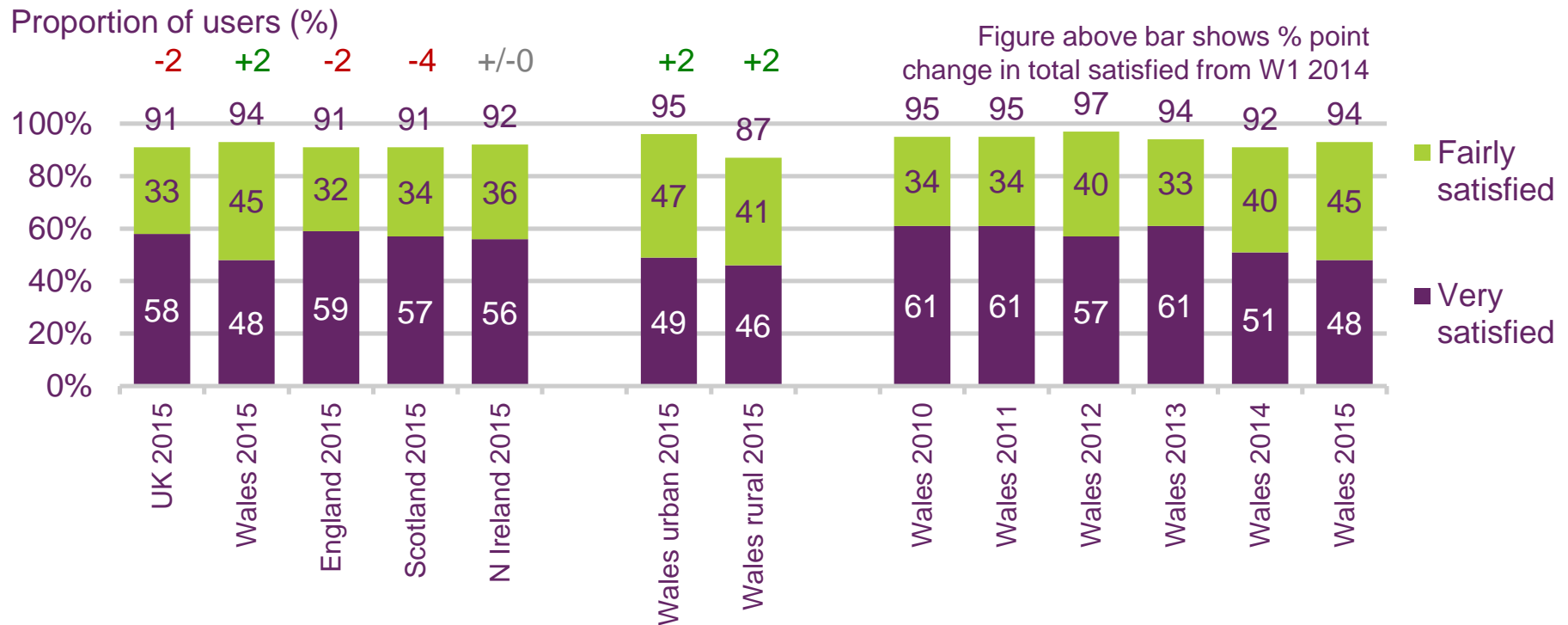
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ with a landline phone at home (n = 3148 UK, 423 Wales, 1905 England, 403 Scotland, 417 Northern Ireland, 207 Wales urban, 216 Wales rural, 874 Wales 2010, 402 Wales 2011, 419 Wales 2012, 395 Wales 2013, 408 Wales 2014, 423 Wales 2015)

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

# Overall satisfaction with mobile phone service



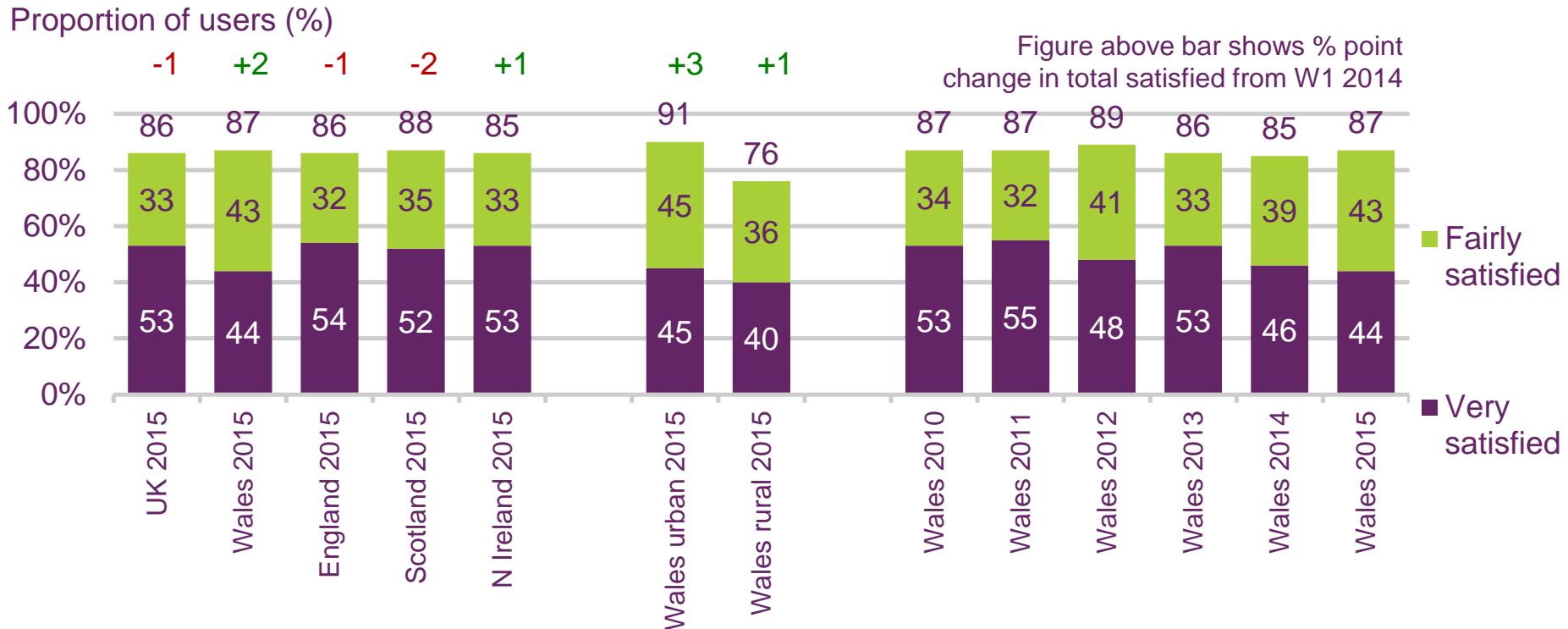
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 439 Wales, 2080 England, 450 Scotland, 456 Northern Ireland, 221 Wales urban, 218 Wales rural, 923 Wales 2010, 416 Wales 2011, 456 Wales 2012, 440 Wales 2013, 438 Wales 2014, 439 Wales 2015)

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

# Satisfaction with reception of mobile service



QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Source: Ofcom Technology Tracker, Wave 1 2015

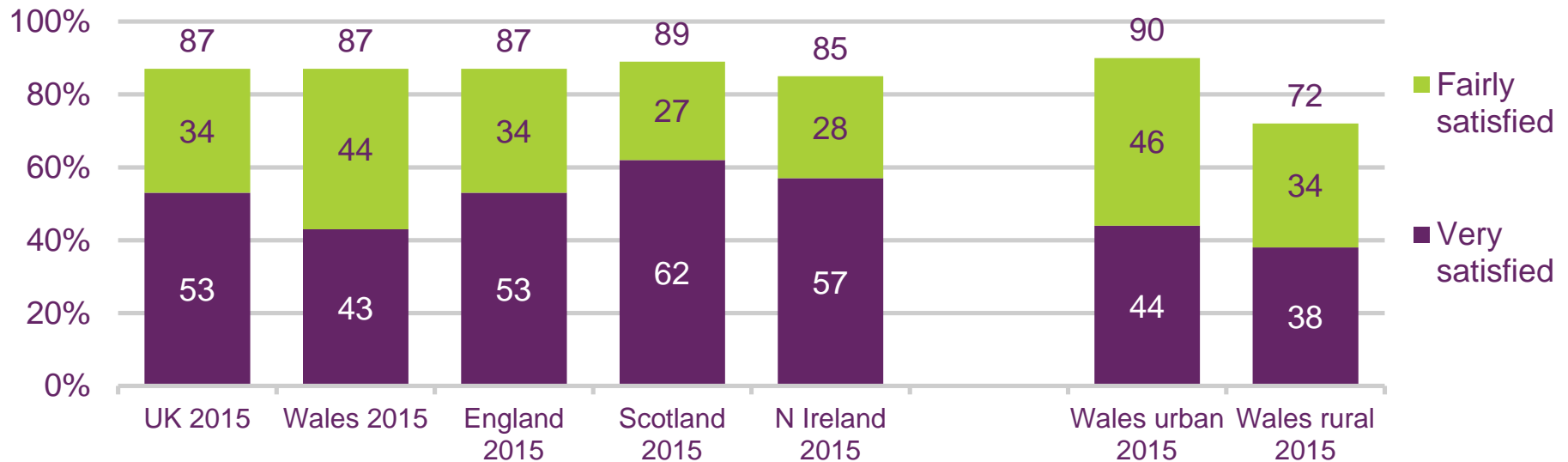
Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 439 Wales, 2080 England, 450 Scotland, 456 Northern Ireland, 221 Wales urban, 218 Wales rural, 923 Wales 2010, 416 Wales 2011, 456 Wales 2012, 440 Wales 2013, 438 Wales 2014, 439 Wales 2015)

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



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

Proportion of users (%)



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)?

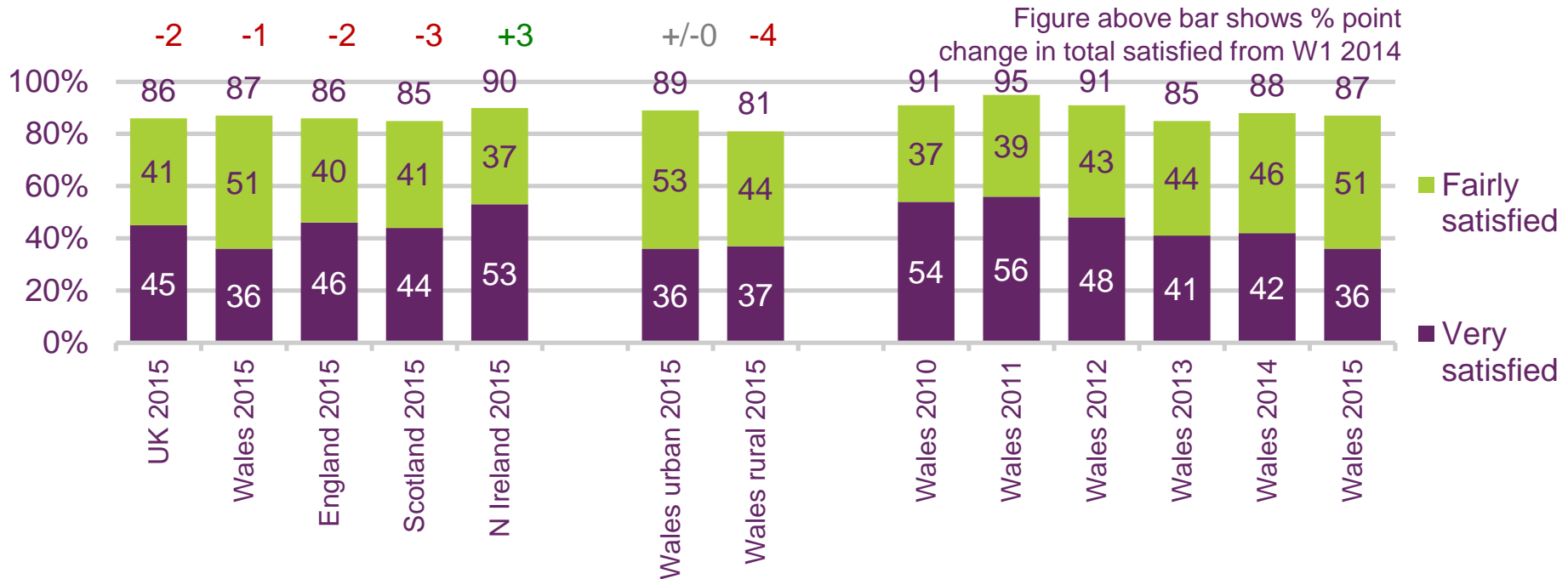
Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who personally use a smartphone (n = 2334 UK, 288 Wales, 1437 England, 303 Scotland, 306 Northern Ireland, 150 Wales urban, 138 Wales 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

# Overall satisfaction with fixed broadband service

Proportion of users (%)



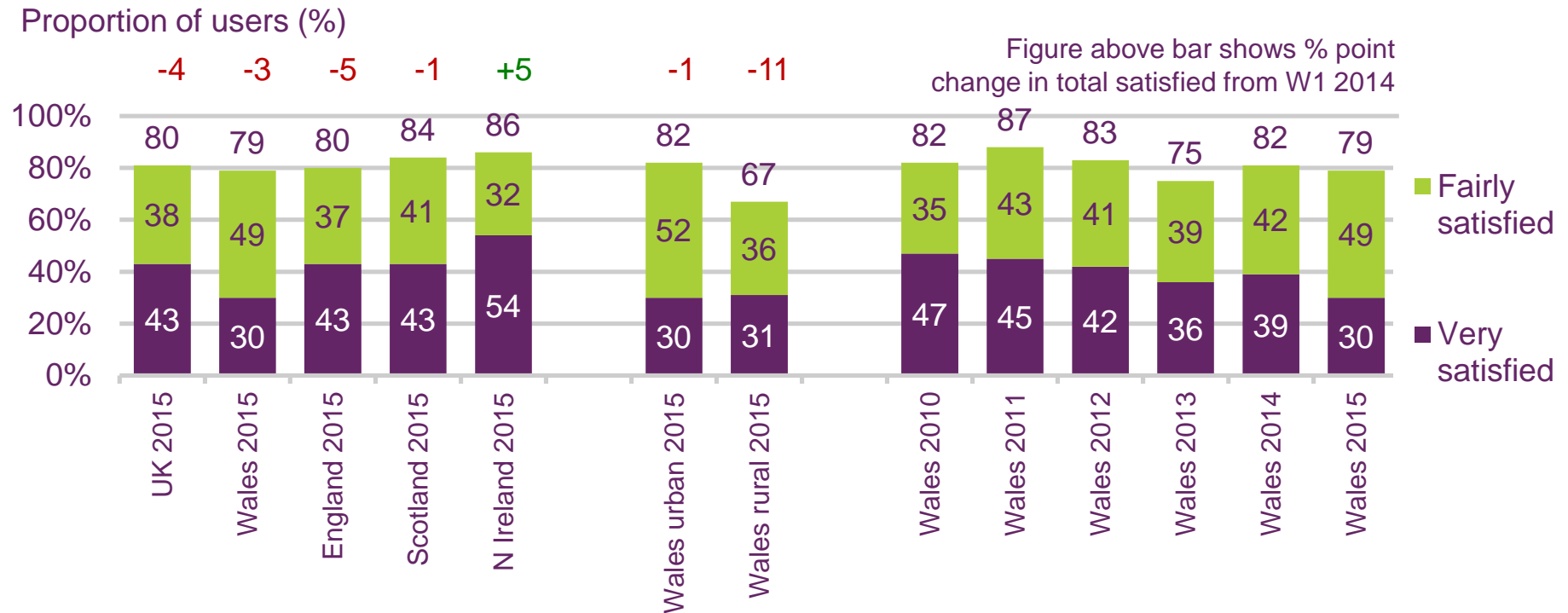
QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2781 UK, 380 Wales, 1721 England, 345 Scotland, 335 Northern Ireland, 185 Wales urban, 195 Wales rural, 604 Wales 2010, 303 Wales 2011, 318 Wales 2012, 294 Wales 2013, 334 Wales 2014, 380 Wales 2015)

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

# Satisfaction with speed of fixed broadband connection



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)?

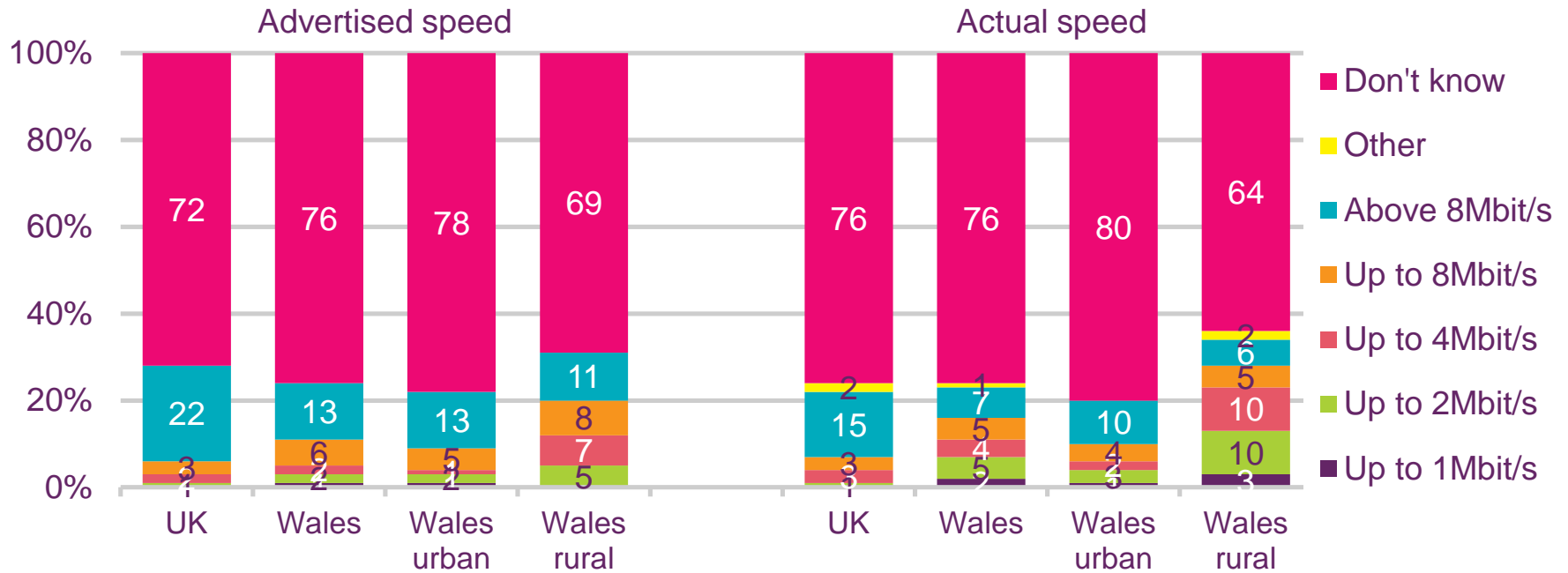
Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2781 UK, 380 Wales, 1721 England, 345 Scotland, 335 Northern Ireland, 185 Wales urban, 195 Wales rural, 604 Wales 2010, 303 Wales 2011, 318 Wales 2012, 294 Wales 2013, 334 Wales 2014, 380 Wales 2015)

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

# Awareness of advertised and actual broadband speeds in Wales

Proportion of users (%)

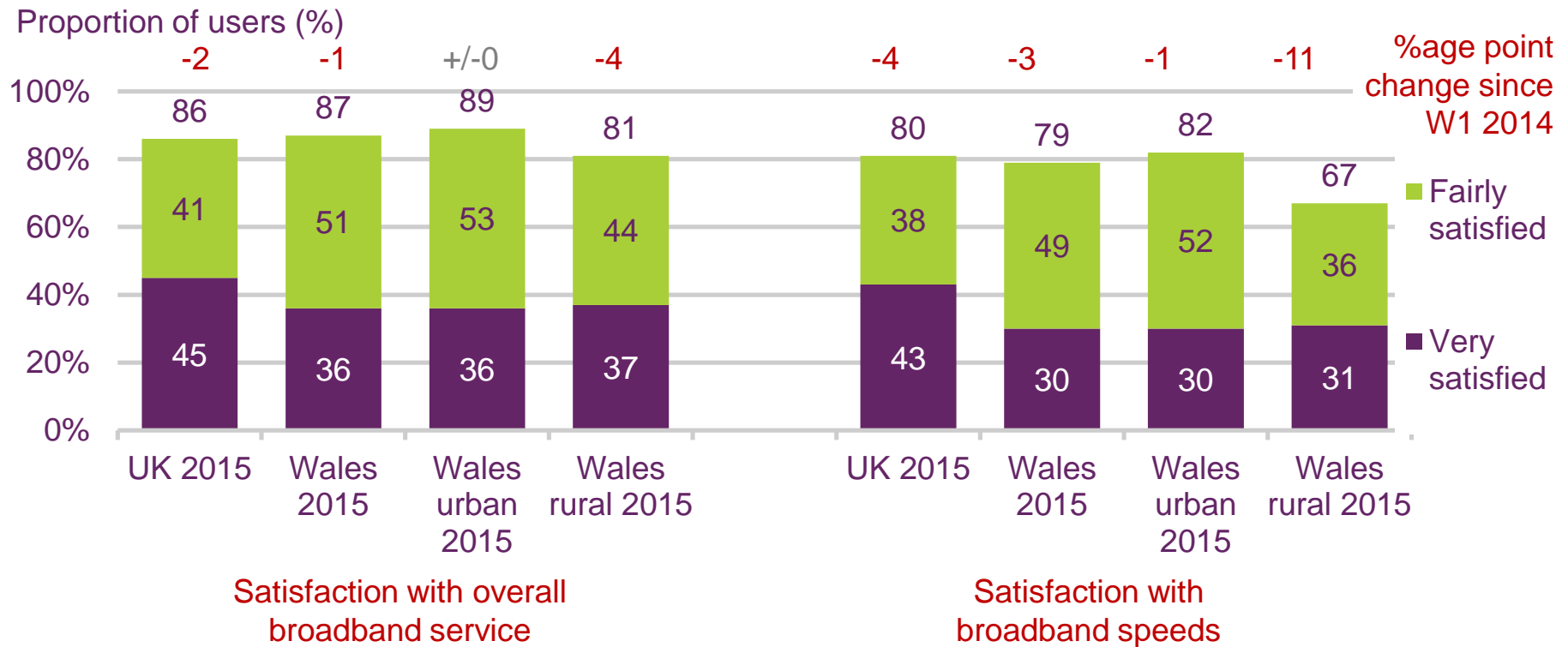


QENEW11. What was the advertised speed of your fixed broadband home internet connection when you took up your service?/ QE11A. What is the actual speed of your fixed broadband home internet connection?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ with broadband connection at home (n = 2781 UK, 380 Wales, 185 Wales urban, 195 Wales rural)

# Satisfaction with overall service and speed of fixed broadband connection



QE8b. 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)?

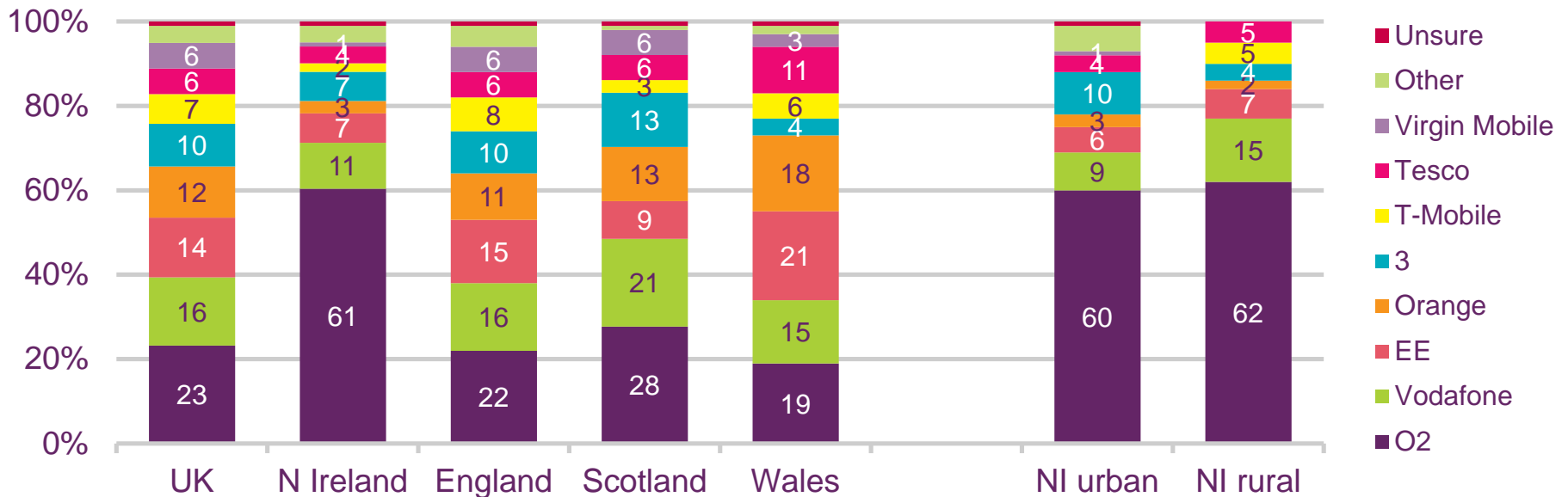
Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2781 UK, 380 Wales, 185 Wales urban, 195 Wales rural)

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

# Mobile network provider used most often

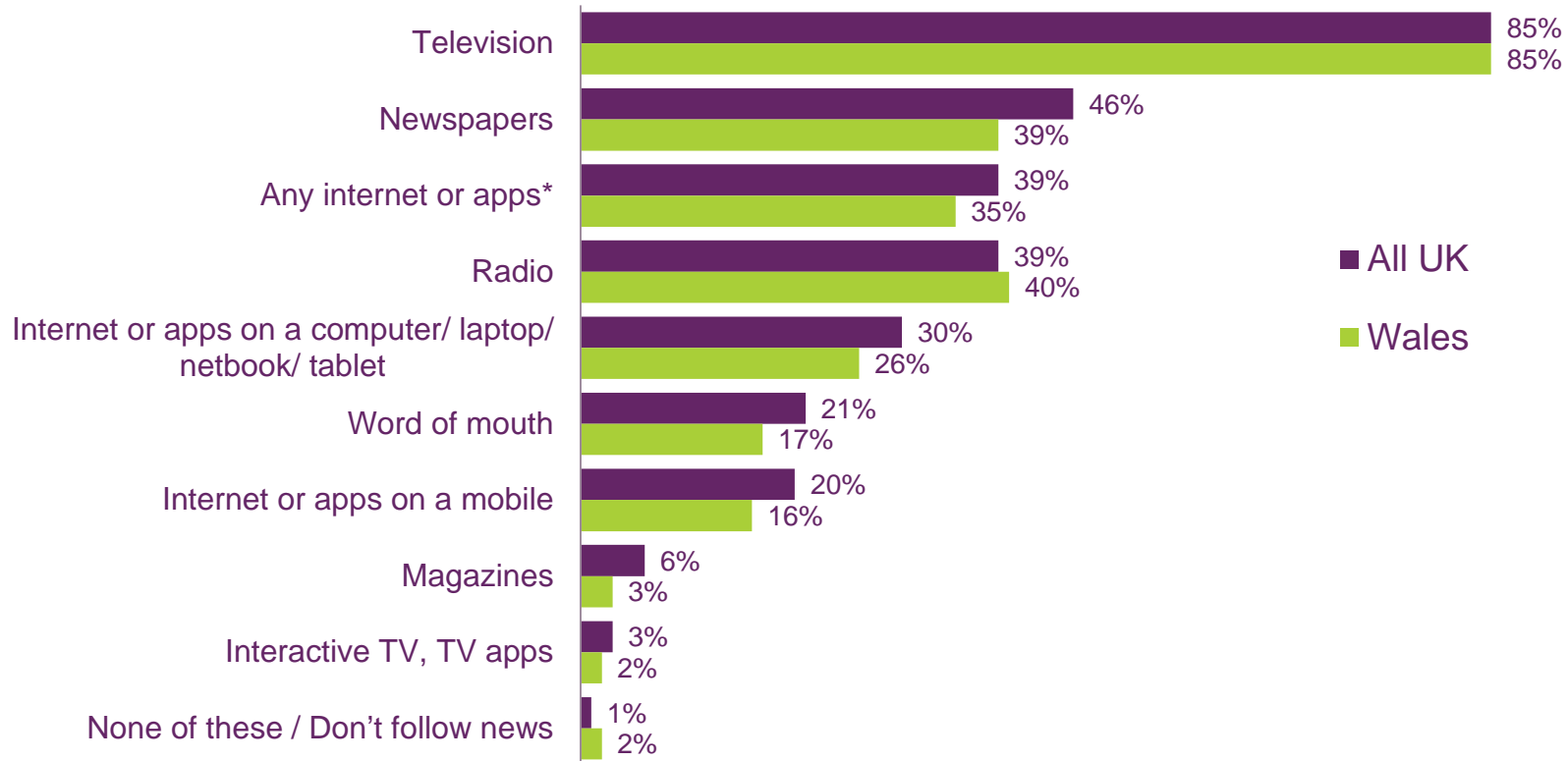
Proportion of mobile users (%)



QD10. Which mobile network do you use most often  
 Source: Ofcom Technology Tracker, Wave 1 2015  
 Base: Adults aged 16+ who personally use a mobile phone?

# News consumption, by platform

% of adults in UK



QN1 Which of the following do you use for news nowadays?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales)

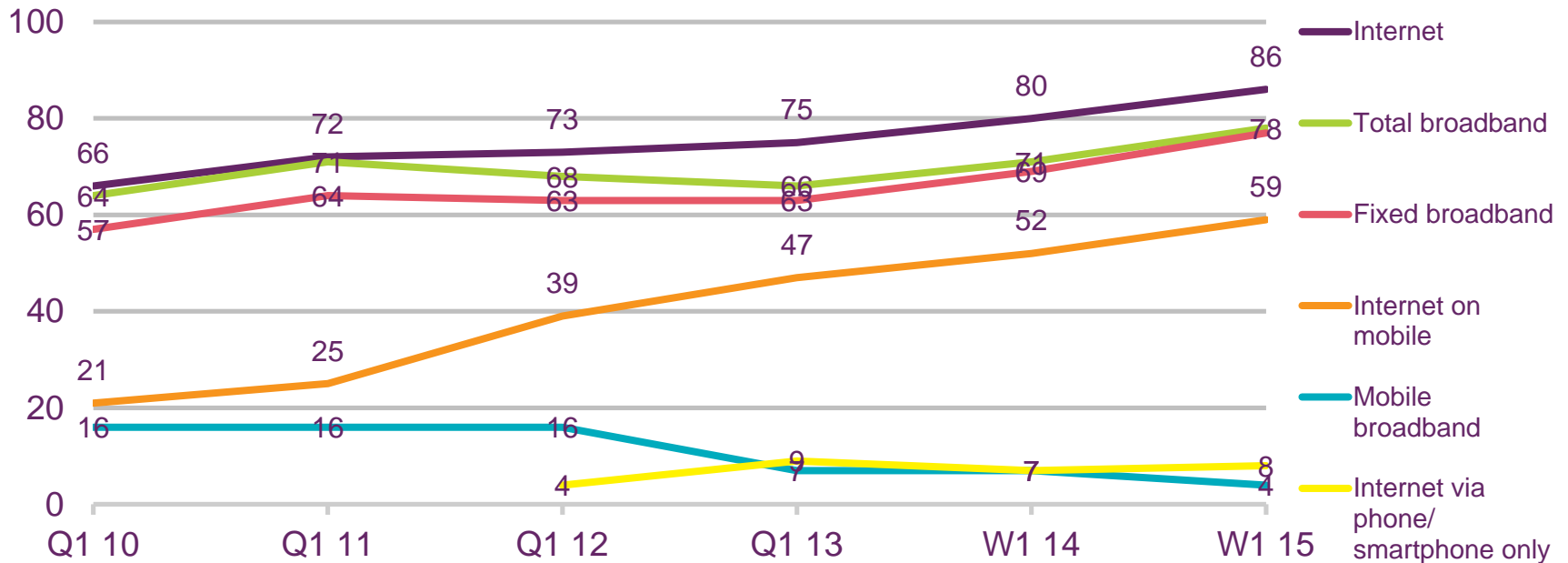
\*Any internet or apps; aggregate of all internet devices.

# Internet and web-based content



# Internet take-up, Wales: 2010-2015

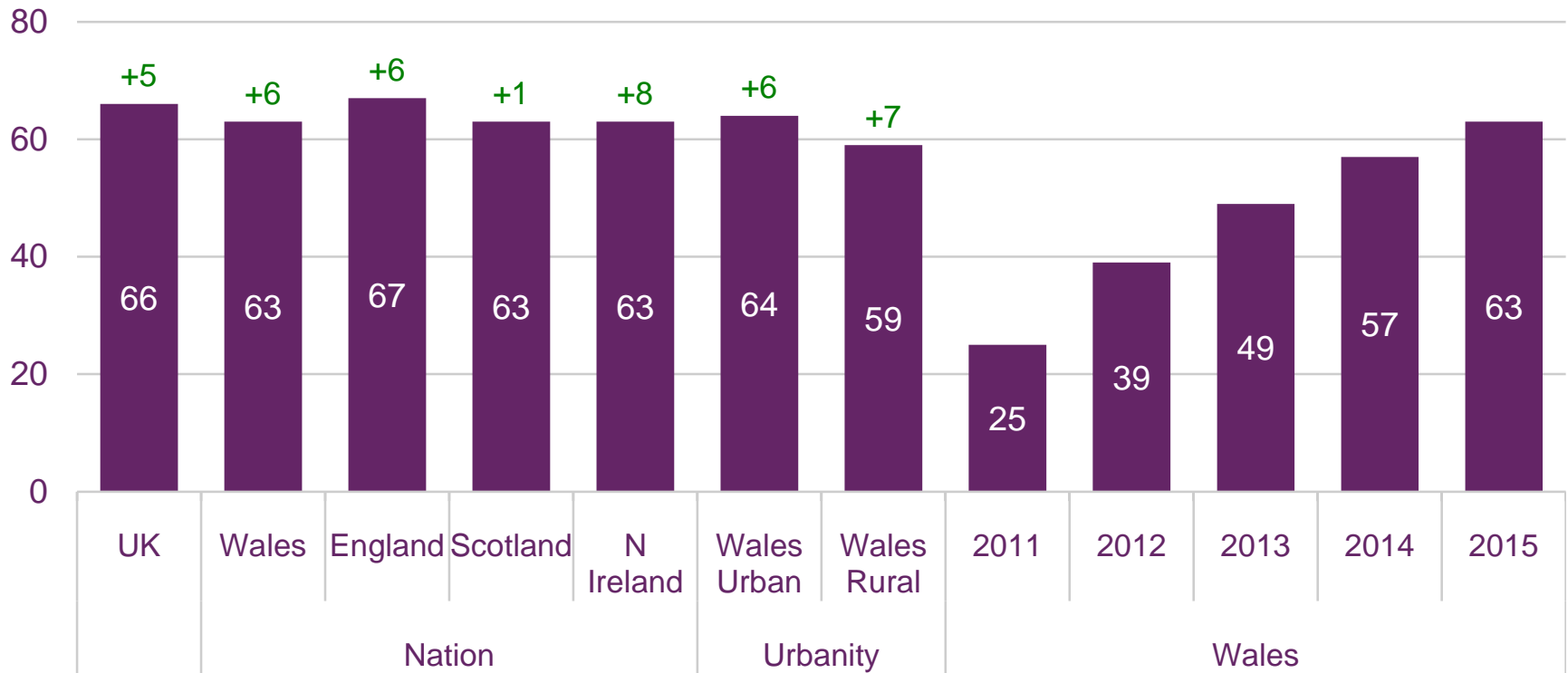
Households (%)



Source: Ofcom Technology Tracker. Data from Quarter 1 of each year 2010-2013, then Wave 1 2014-2015  
 Base: All adults aged 16+ (n = 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Take-up of smartphones in Wales

Adults 16+ (%) / percentage point change in take-up of smartphones from W1 2014



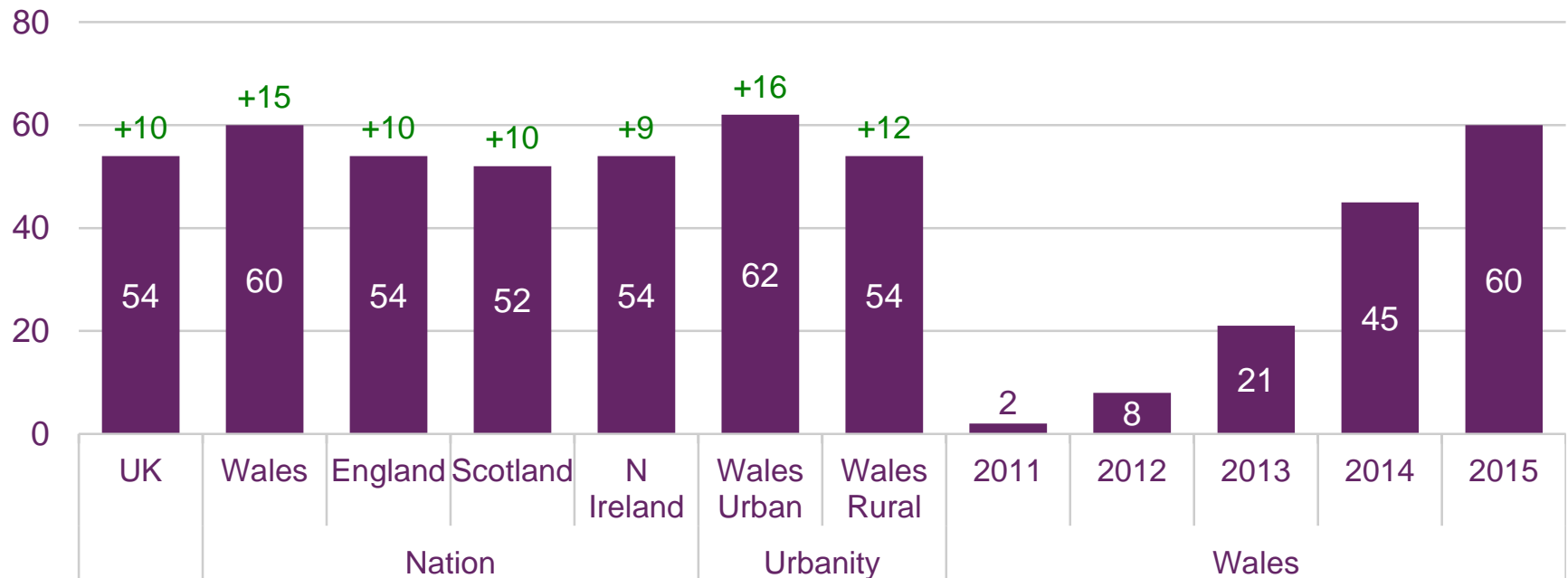
QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Take-up of tablet computers in Wales

Households (%) / percentage point change in take-up of tablet computers from W1 2014

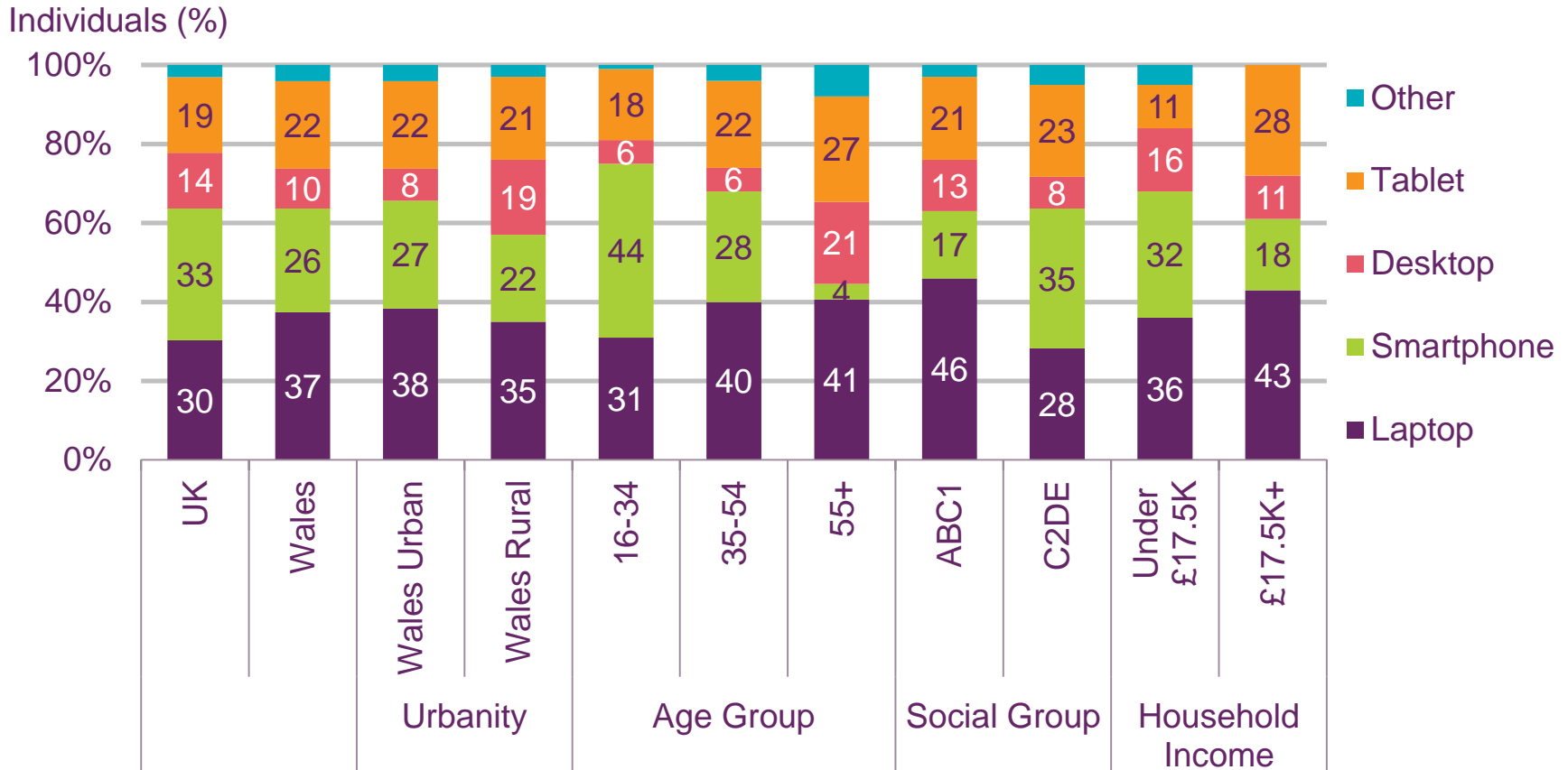


QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

# Most important device for accessing the internet in Wales



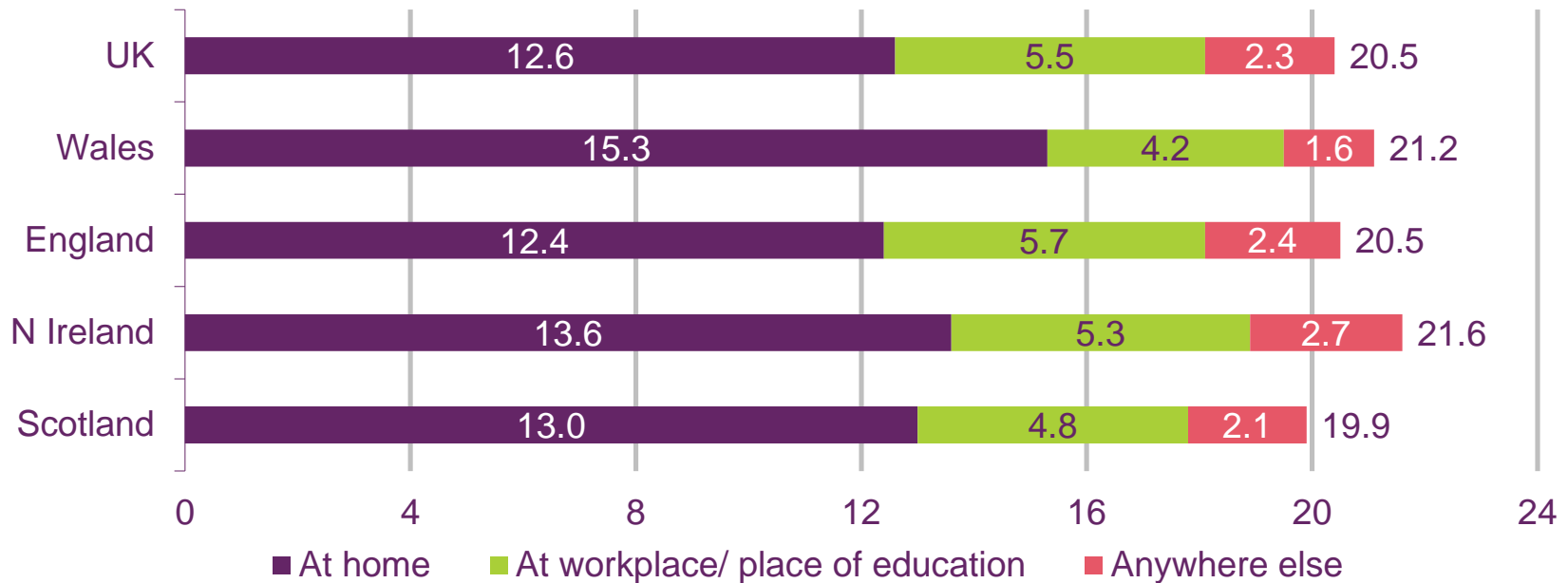
QE40. Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "Other device", "None" and "don't know".

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Internet users aged 16+ (n = 3095 UK, 413 Wales, 204 Wales urban, 209 Wales rural, 123 16-34, 147 35-54, 143 55+, 232 ABC1, 181 C2DE, 121 under £17.5K, 112 £17.5K+)

# Claimed time spent on the internet in a typical week

Hours per week

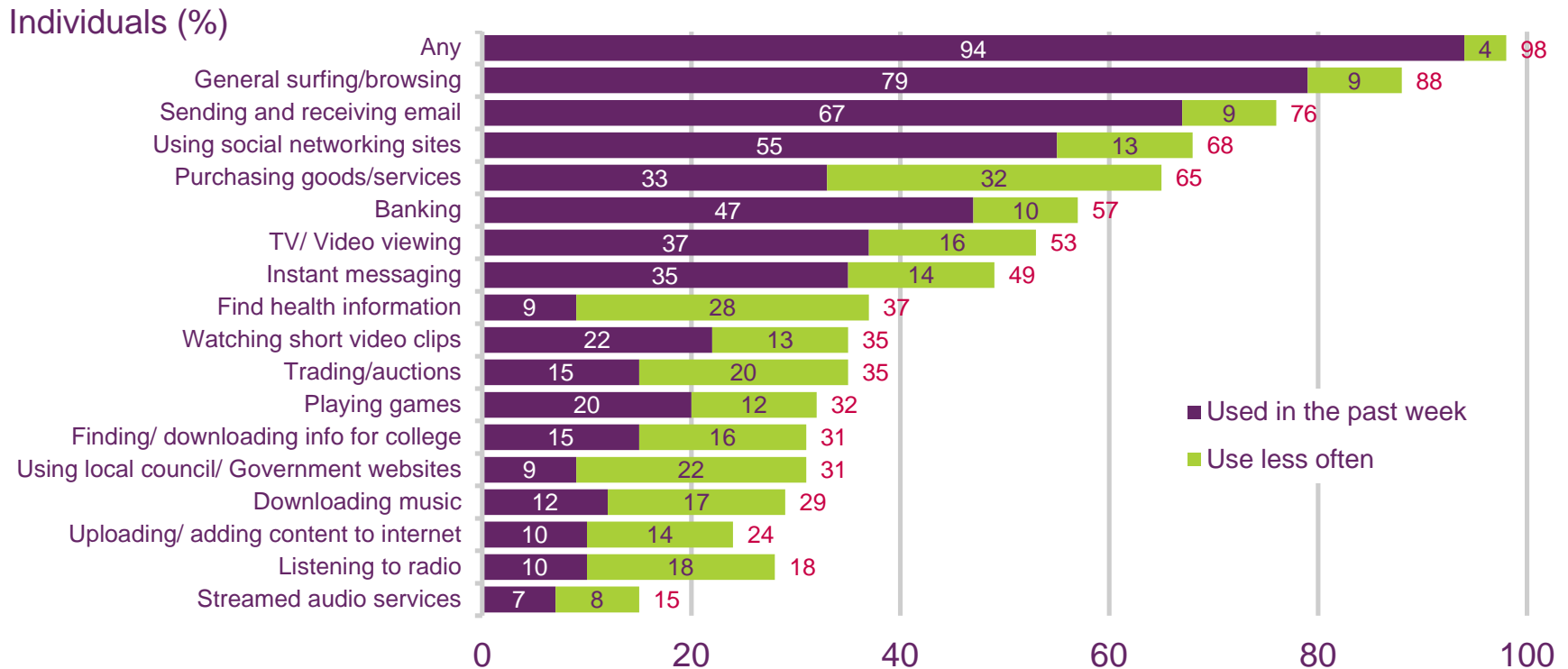


IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

# Activities conducted online by internet users in Wales



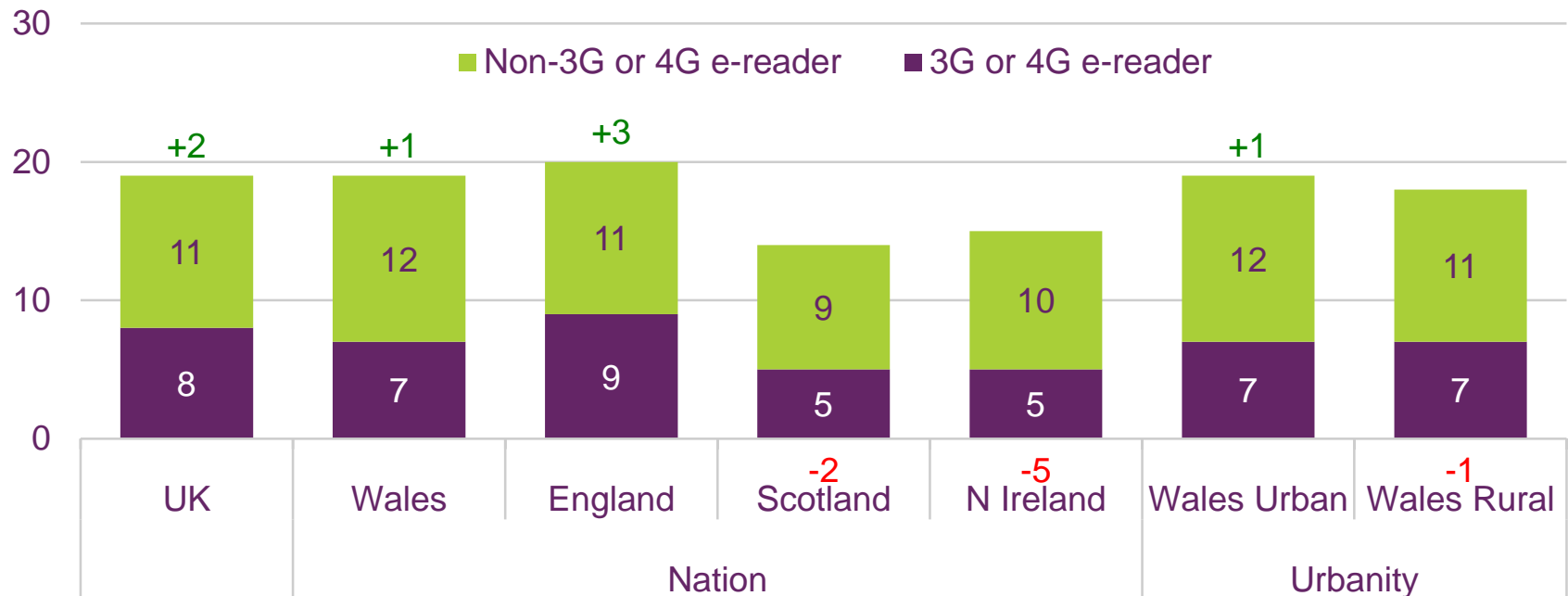
QE5. Which, if any, of these do you use the internet for?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 413 Wales 2015)

# Personal use of e-readers: 2015

Individuals (%) / Percentage point year on year change



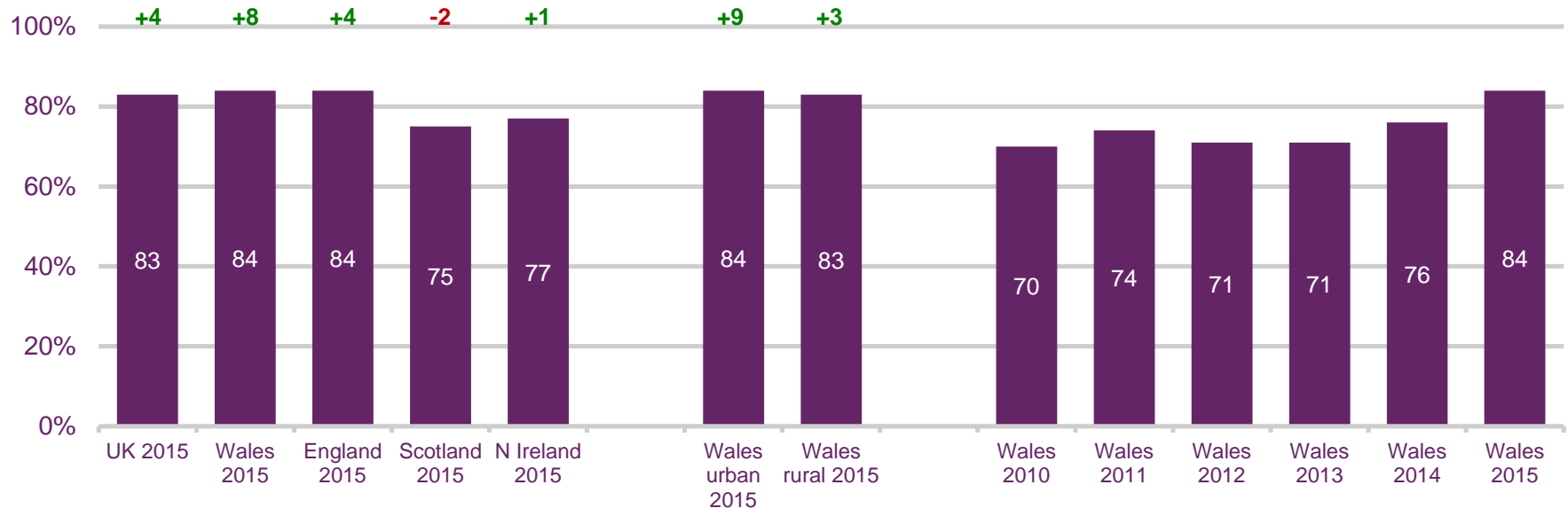
QB1. Which of the following do you, or does anyone in your household, have in your home at the moment?/ QB2. And do you personally use.../ QB6. Does your household's e-reader have built-in 3G or 4G access to a mobile network?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3612 UK, 496 Wales, 2264 England, 492 Scotland, 360 Northern Ireland, 249 Wales urban, 247 Wales rural)

# Household computer ownership inc. PCs, laptops, tablets and netbooks

Figure above bar shows % point change in computer ownership from W1 2014



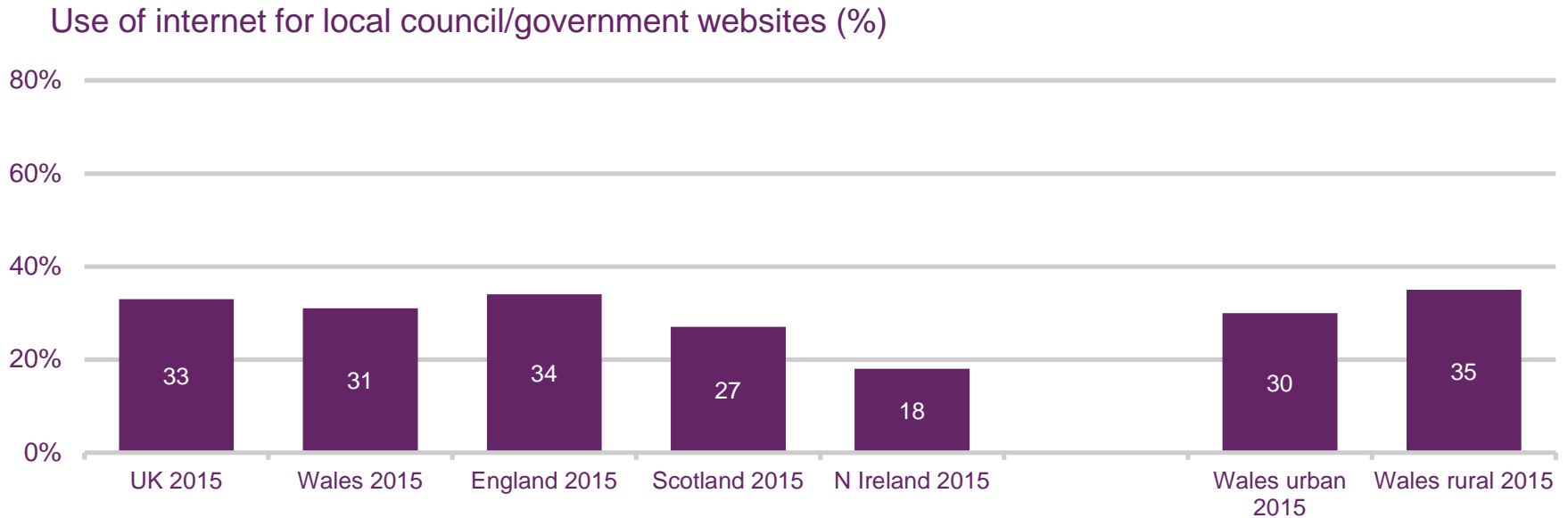
QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)



# Use of the internet to access local council/government websites

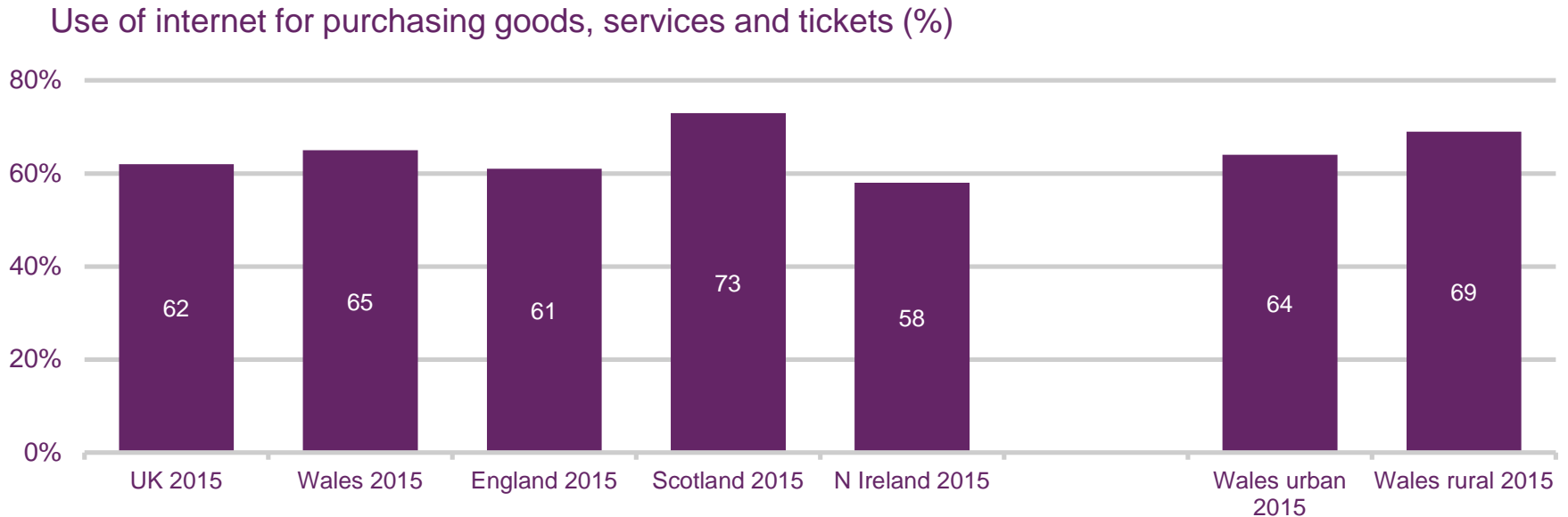


QE5A-B. Which, if any, of these do you use the internet for?

Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK, 413 Wales, 1911 England, 388 Scotland, 383 Northern Ireland, 204 Wales urban, 209 Wales rural)

# Use of the internet to purchase goods, services, tickets



QE5A-B. Which, if any, of these do you use the internet for?

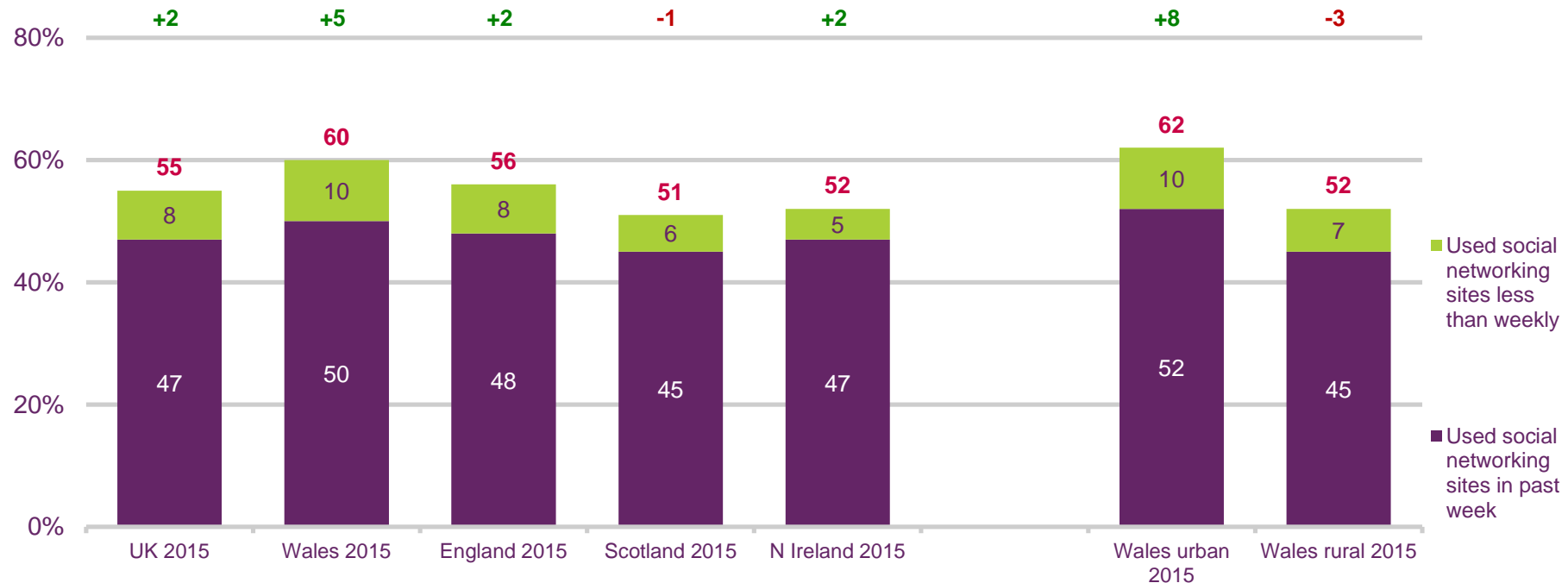
Source: Ofcom Technology Tracker, Wave 1 2015

Base: Adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK, 413 Wales, 1911 England, 388 Scotland, 383 Northern Ireland, 204 Wales urban, 209 Wales rural)

# Use of social networking sites

Use of social networking sites (%)

Figure above bar shows year on year change



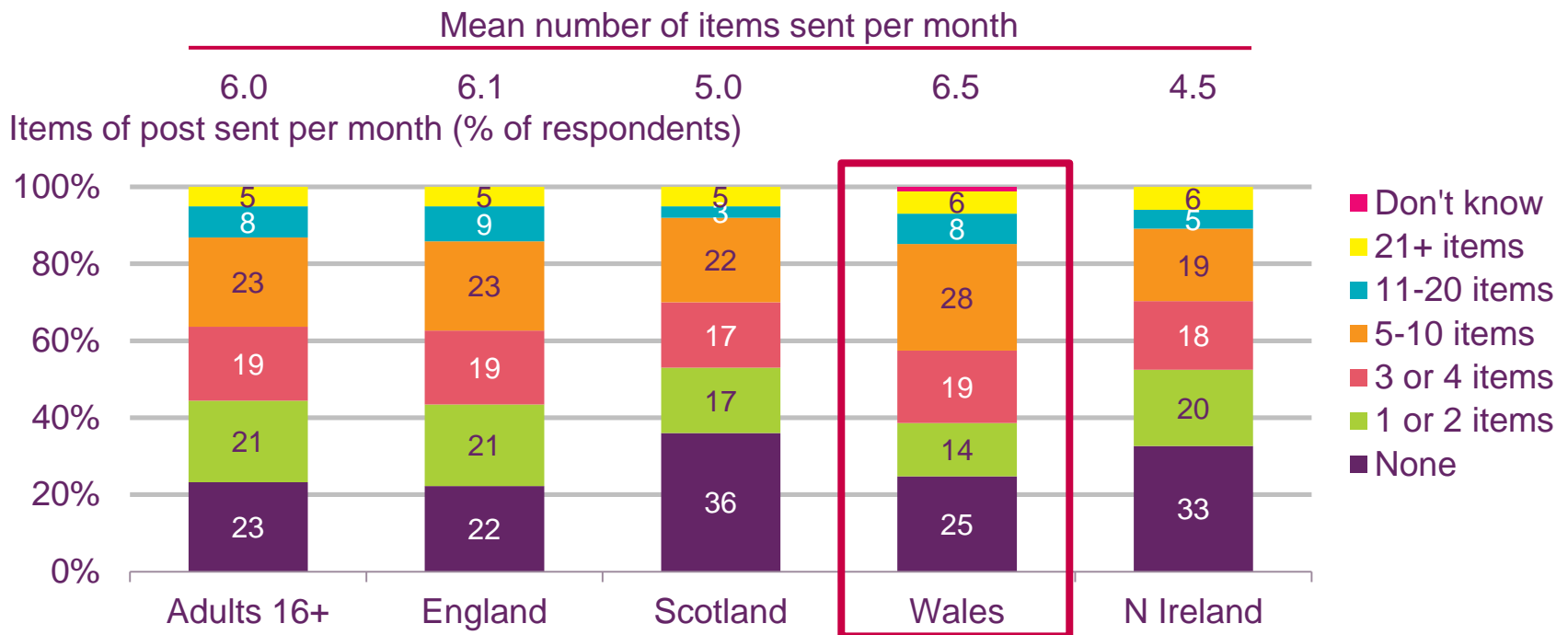
QE5A-B. Which, if any, of these do you use the internet for?/ And, which, if any, of these activities have you used the internet for in the last week?/  
 QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?

Source: Ofcom Technology Tracker, Wave 1 2015

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

# Post

# Approximate number of items of post sent each month



Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)

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

# Type of post sent in the past month

Proportion of consumers (%)

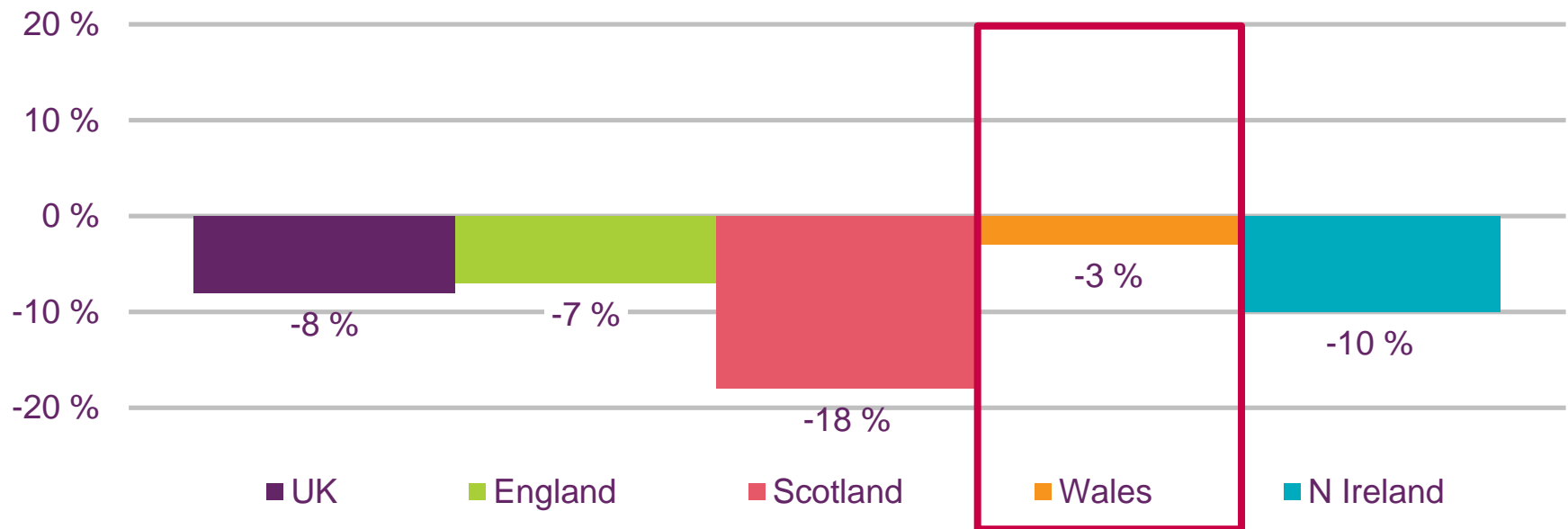


Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All who have personally sent any items of post in the last week (n = 2685 UK, 1673 England, 382 Scotland, 330 Wales, 300 Northern Ireland)

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

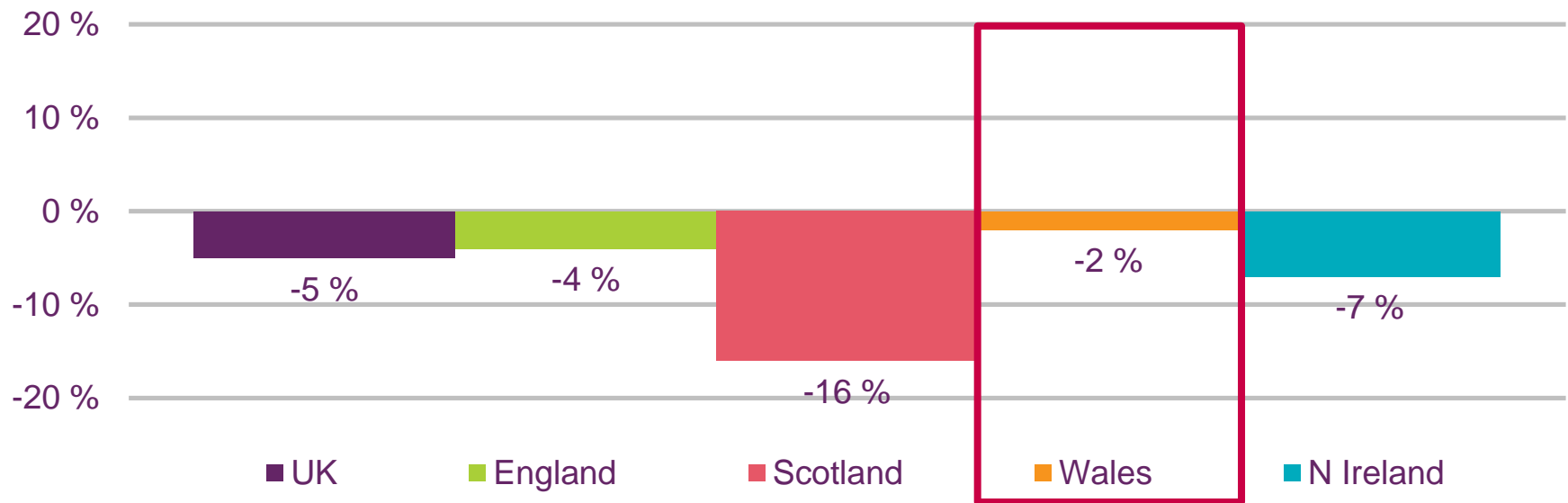
## Net claimed change in amount of post sent in the past two years



Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland) QC10. Compared with two years ago, would you say that the number of items you send through the post has... increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly? Note: Chart shows net percentage (% who claim their use has increased - % who claim their use has decreased)

## Net change in amount of post predicted to be sent in two years' time

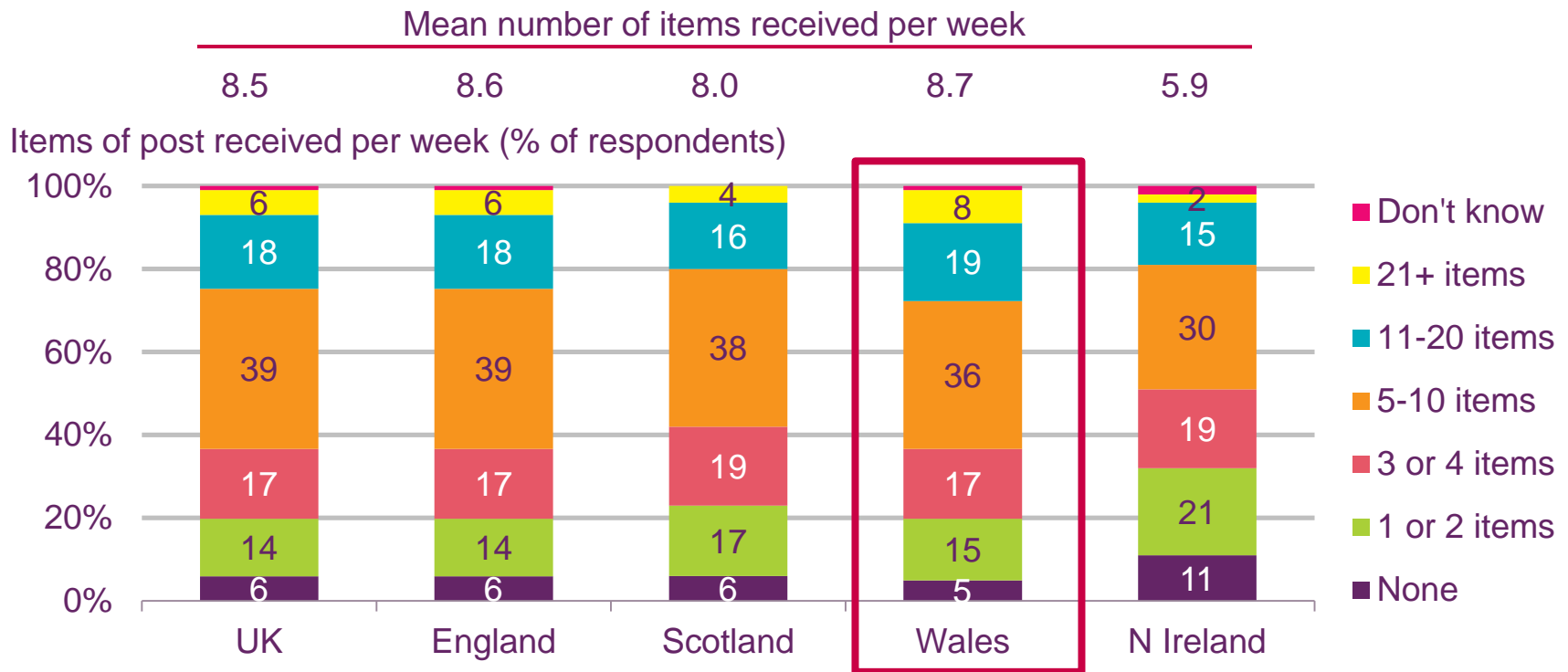


Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All respondents (n = 2354 adults 16+, 1433 England, 379 Scotland, 278 Wales, 264 Northern Ireland) QC25. Looking to the future... Compared with now, would you say that the number of letters and cards you will be sending in the post two years from now will have... increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly? Note: Chart shows net percentage (% who claim their use will increase - % who claim their use will decrease)



# Approximate number of items of post received in the past week

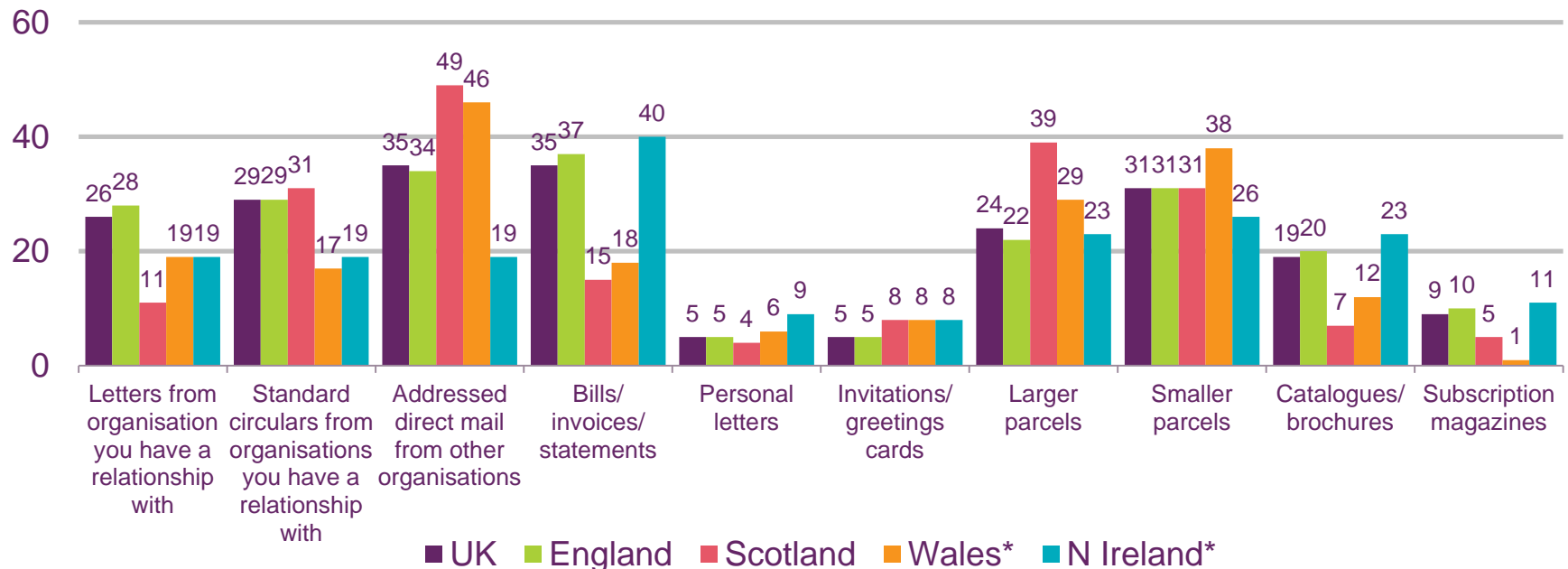


Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland) QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

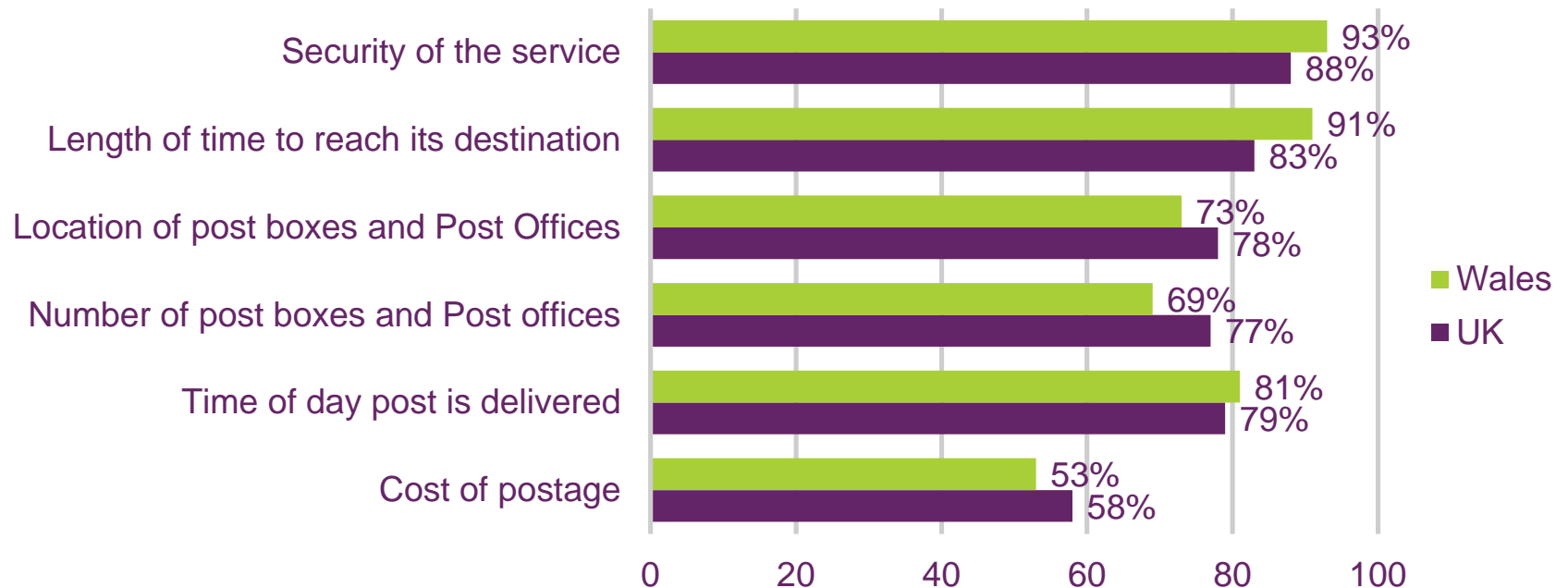
# Types of items people are receiving more often

Proportion of consumers (%)



Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015 Base: All respondents who say that the number of items received by post has increased, compared to two years ago (n = 885 adults 16+, 580 England, 130 Scotland, 98 Wales, 77 Northern Ireland) QD6. Which of these types of addressed items are you personally receiving more often through the post now? (MULTICODE). \*Caution: Low base

## Satisfaction with specific aspects of Royal Mail's service

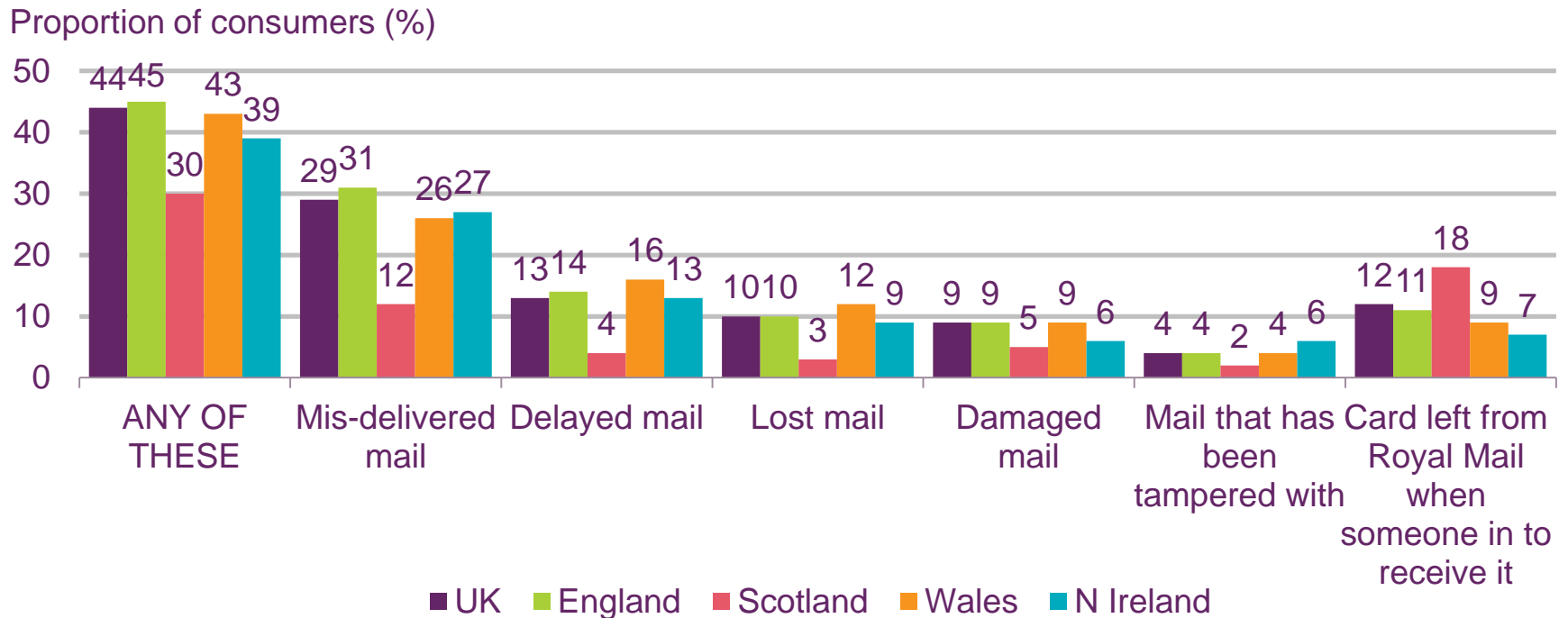


Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All respondents in Wales (n = 3557 UK, 418 Wales)

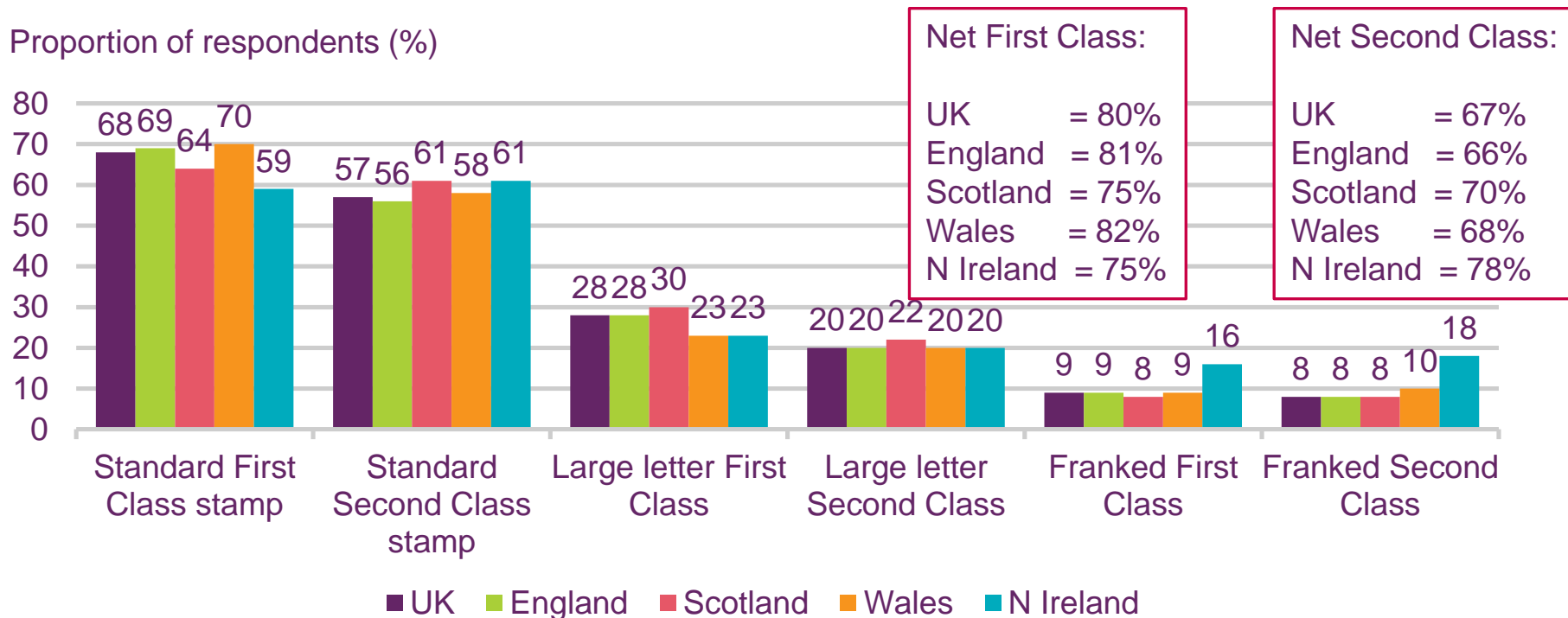
QE3A-F. Satisfaction with specific aspects of Royal Mail's services – Ranked by proportion satisfied among adults in Wales

# Problems experienced with Royal Mail in the past 12 months



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015 Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland) QG1A-E. Problems experienced with Royal Mail service in the last 12 months – Ranked by proportion among all UK adults

# Royal Mail services used to send standard post each month



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base : All respondents using RM standard delivery services (n = 1493 UK, 916 England, 205 Scotland, 182 Wales, 190 N Ireland) QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

## Switched some mail to other communication methods over last twelve months

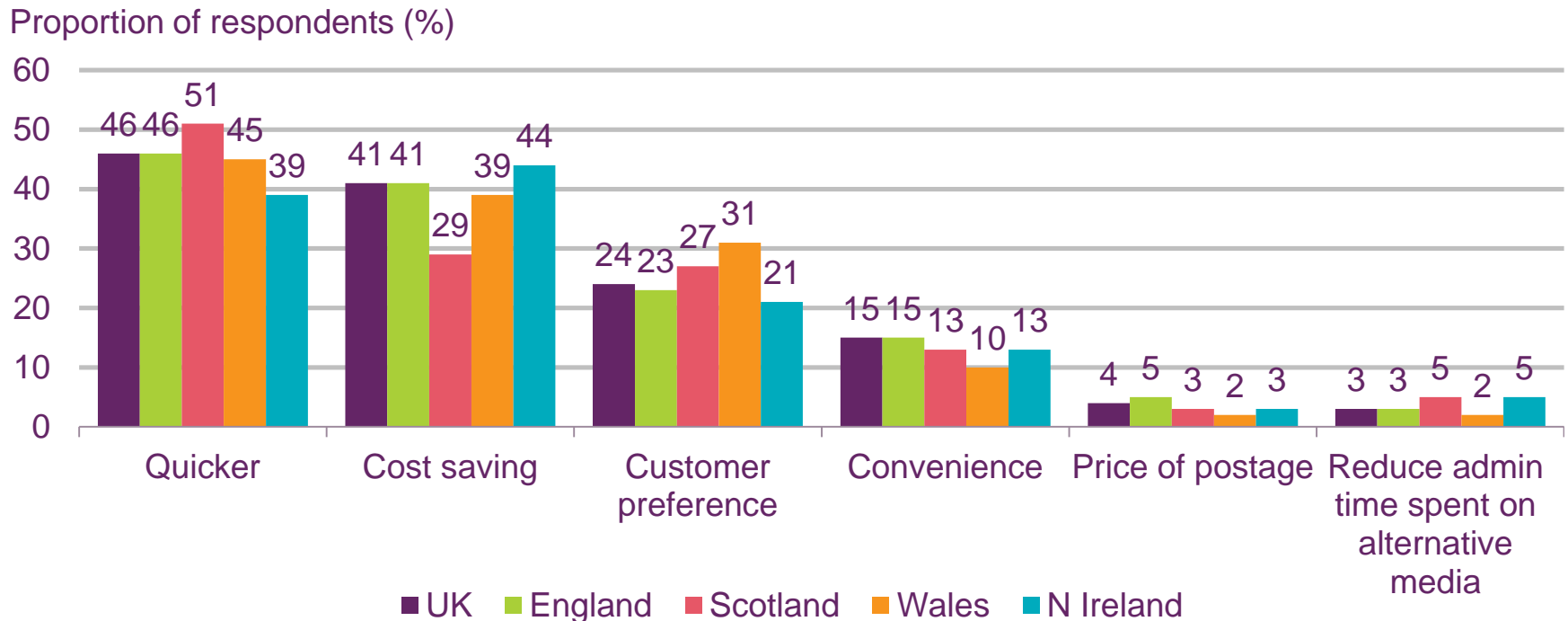


Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 N Ireland)

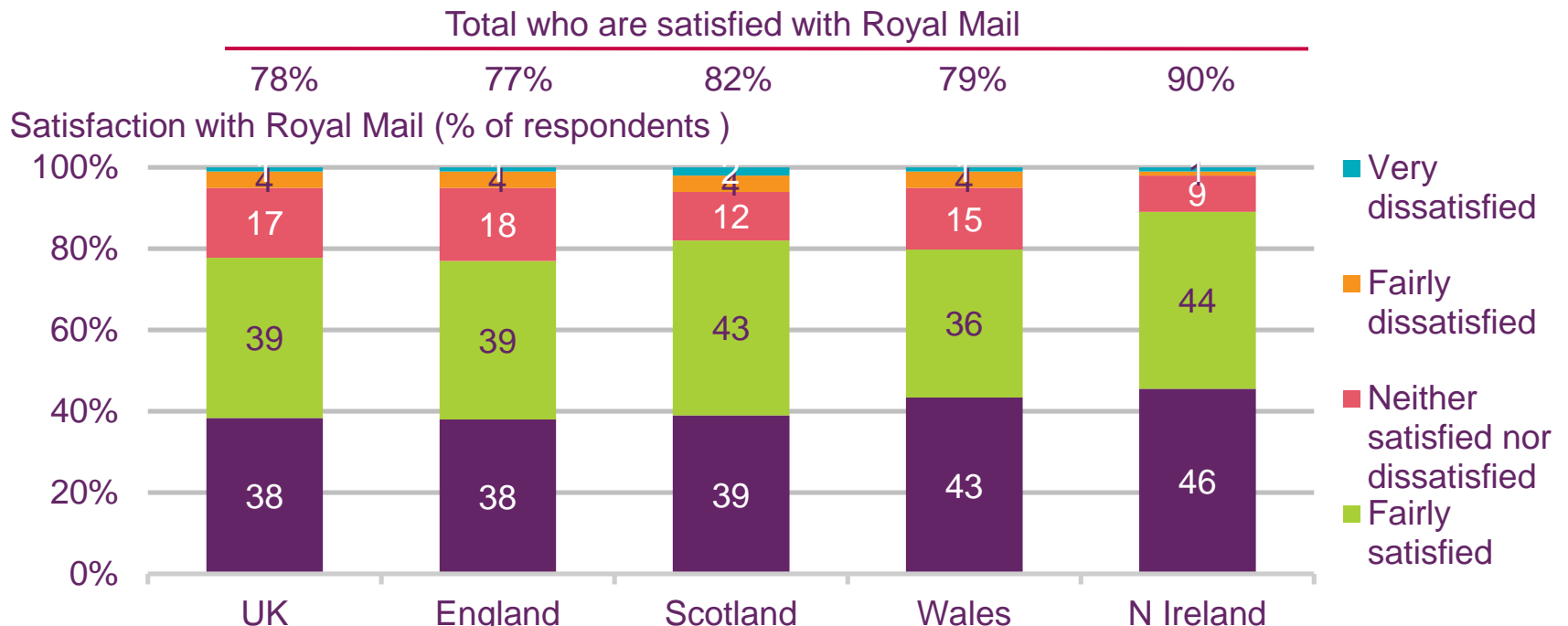
QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

# Reasons for switching some mail to other methods over past 12 months



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015 Base: All who have moved to other communication methods (n = 1028 UK, 626 England, 127 Scotland, 130 Wales, 145 N Ireland) QF6: Why have you moved some mail to other communication methods? OPEN ENDED Top 5 reasons shown

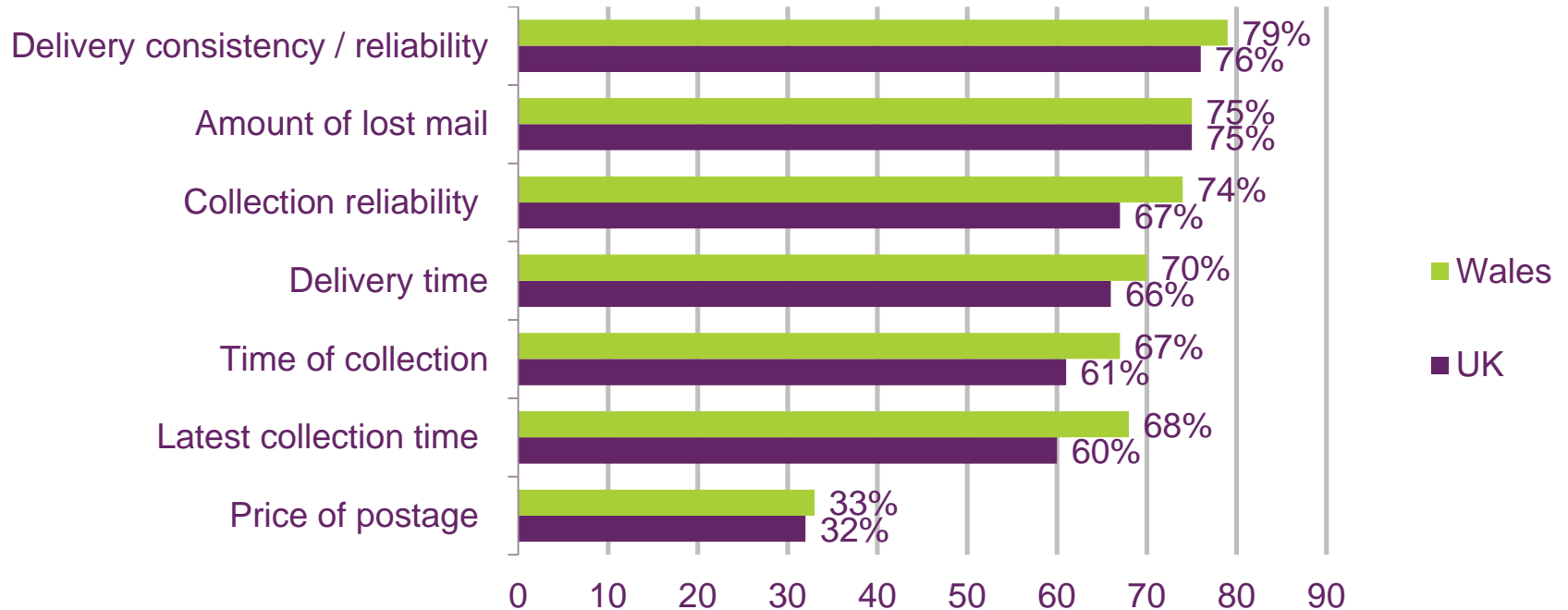
# Overall satisfaction with the quality of service from Royal Mail



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015 Base: All respondents who use Royal Mail (n = 1563 UK, 958 England, 213 Scotland, 195 Wales, 197 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?



## Satisfaction with specific aspects of Royal Mail's service



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base: All respondents who use Royal Mail (n = 1563 UK, 195 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?

# Parcels sent in the past month

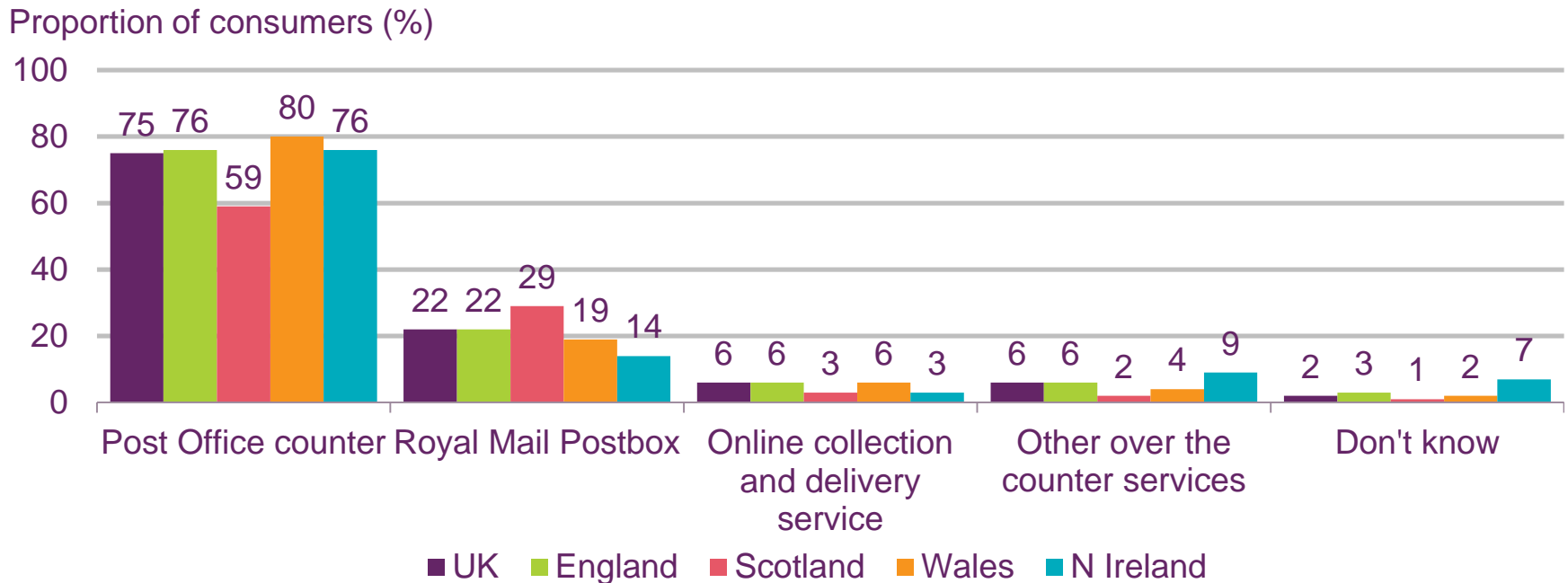


Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)

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

# Methods used to send parcels



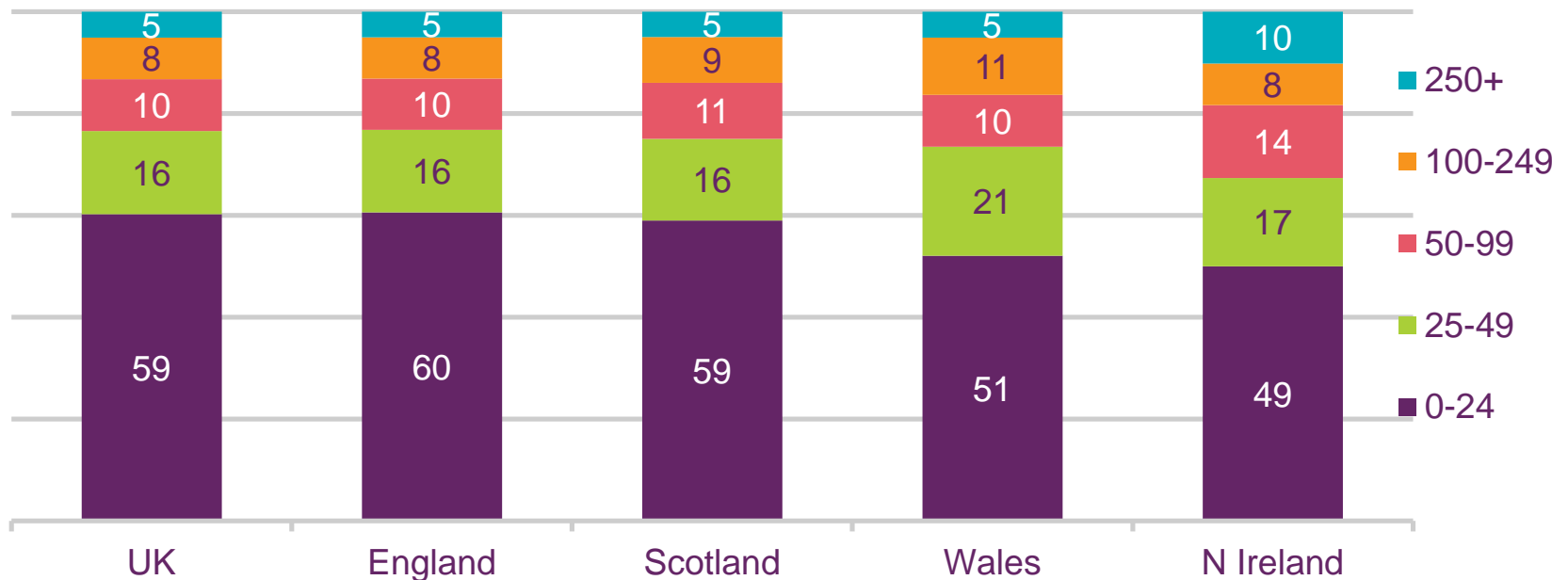
Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015

Base: All who have sent any parcels in the last month (n = 1088 adults 16+, 688 England, 146 Scotland, 135 Wales, 119 Northern Ireland)

QC20. You said earlier that you have sent one or more parcels in the last month... When you sent these parcels, which of these methods did you use? (MULTICODE)

# Average volume of letters sent each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015

Base : All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 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.