

4 Internet and web-based content

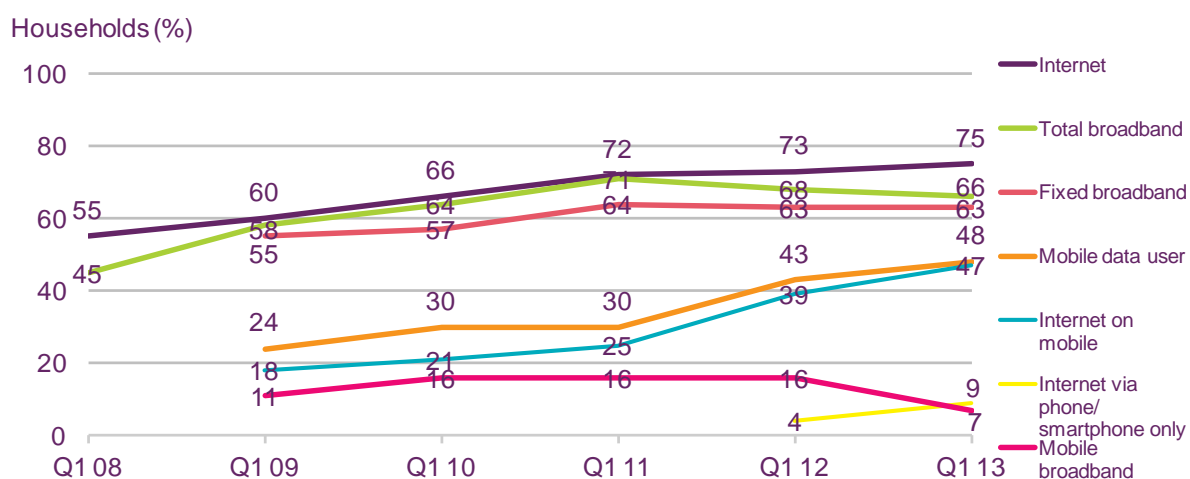
4.1 Internet take-up

One in ten consumers in Wales access the internet exclusively through a mobile phone

Three-quarters of households in Wales (75%) had access to the internet at Q1 2013 (via broadband, mobile phone or narrowband), with a two percentage point year-on-year increase.

Internet access via a mobile increased by eight percentage points to 47%, with those accessing the internet exclusively through a mobile phone or smartphone rising from 4% in 2012 to 9% in 2013 – the highest across the devolved nations. Subsequently, the total number of mobile data users has continued to rise (to 48%), despite the nine percentage point fall in consumers using a mobile broadband connection (7%).

Figure 4.1 Internet take-up, Wales: 2008-2013



Source: Ofcom Technology Tracker

Base: All adults aged 16+ (n = 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013)

4.2 Internet-enabled devices

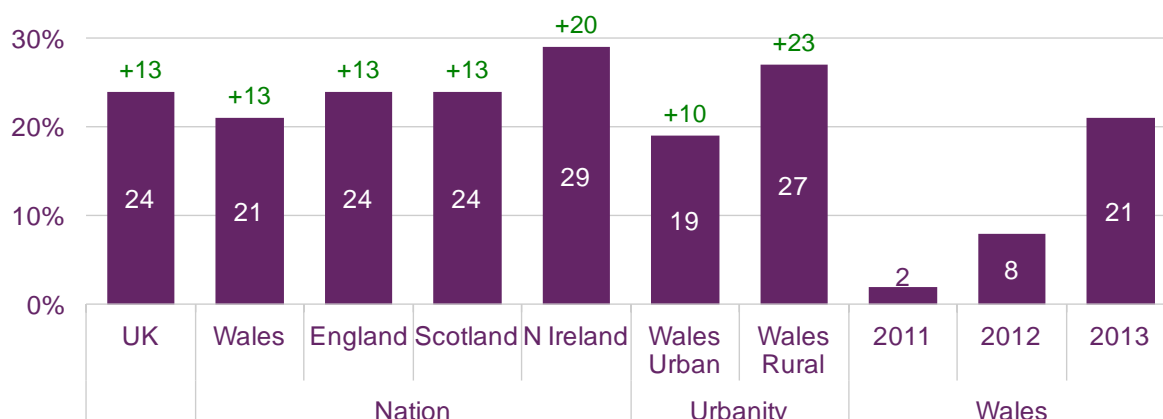
One in five households in Wales own a tablet computer

Just over one in five (21%) households in Wales now own a tablet computer, slightly lower than the UK average of 24%. Growth in tablet ownership in Wales has been on a par with the UK average, increasing by 13 percentage points in the year to Q1 2013.

Take-up of tablets has been particularly marked in rural areas, where just over one in four (27%) households claim to own a tablet, an increase of 23 percentage points on Q1 2012. Take-up in urban areas has also increased, but by a smaller margin of ten percentage points, to one in five (19%) households.

Figure 4.2 Take-up of tablet computers

Households (%) / percentage point change in take-up of tablet computers from Q1 2012



Source: Ofcom research, Q1 2013 Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013)

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

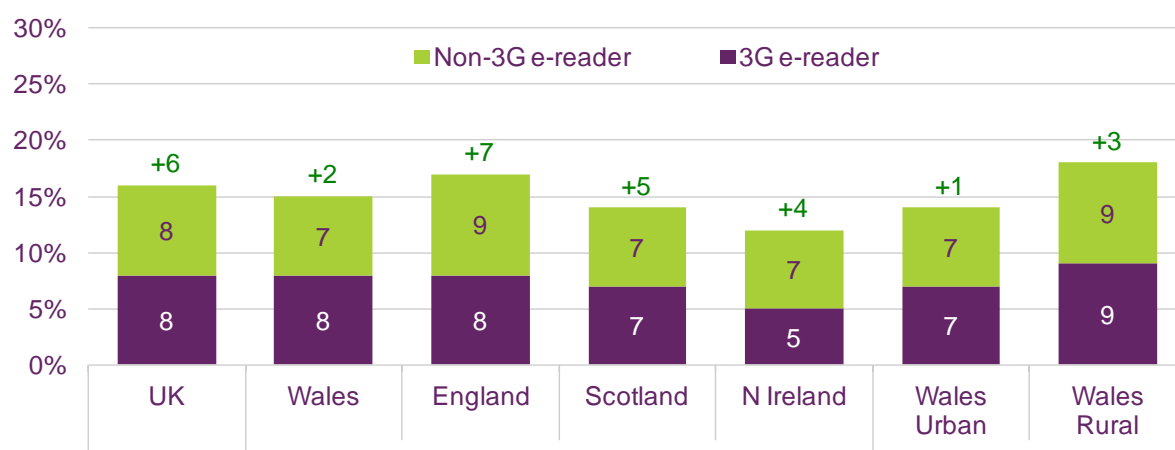
One in seven consumers in Wales personally use an e-reader

Personal use of an e-reader rose two percentage points to one in seven (15%) consumers in Wales. Take-up in Q1 2013 was on par with the UK average (16%); while growth across the rest of the UK was greater than in Wales. Wales had previously had the highest take-up among UK nations in Q1 2012.

Consumers in rural areas of Wales (18%) were more likely to use an e-reader than those in urban areas (14%). As with the rest of the UK, the split between 3G and non-3G e-readers remained broadly similar.

Figure 4.3 Personal use of e-readers, 2013

Individuals (%) / Percentage point year on year change



Source: Ofcom research, Q1 2013

Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural)

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 access to a mobile network?

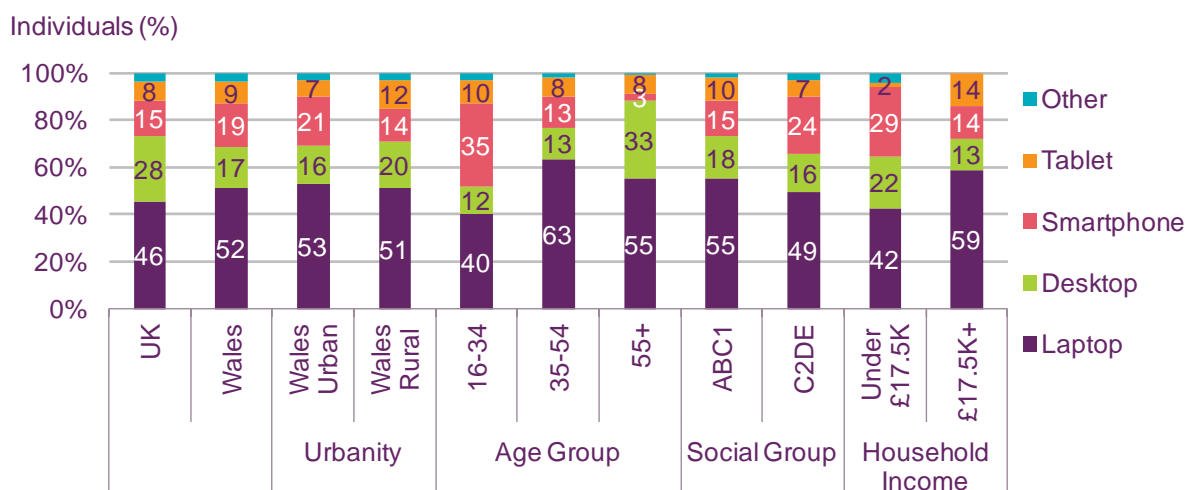
A third of 16-34s claim their smartphone is their most important device for internet access

Use of the mobile internet continues to grow in Wales; 47% accessed the internet on their handset compared to 49% in the UK. Furthermore, one in ten consumers in Wales accesses the internet only through their mobile phone. However, when asked what was their most important device for accessing the internet, the majority of consumers in Wales chose their laptop (52%). Nevertheless, a fifth (19%) chose their smartphone, a greater proportion than the UK average (15%).

Those aged 16-34 were significantly less likely (40%) than those aged 35-54 (63%) to choose their laptop as their most important internet device, and significantly more likely than other age groups (at 35%) to choose their smartphone. This reflects the fact that one in five (20%) 16-34 year olds in Wales access the internet exclusively on their smartphone, compared to the UK averages of 4% for all ages and 9% for 16-34 year olds.

Device preferences reflect, in part, take-up of devices; we consider device importance by ownership in Chapter 4 of the *UK Communications Market Report*.

Figure 4.4 Most important device for accessing the internet in Wales



Source: Ofcom research, Q1 2013

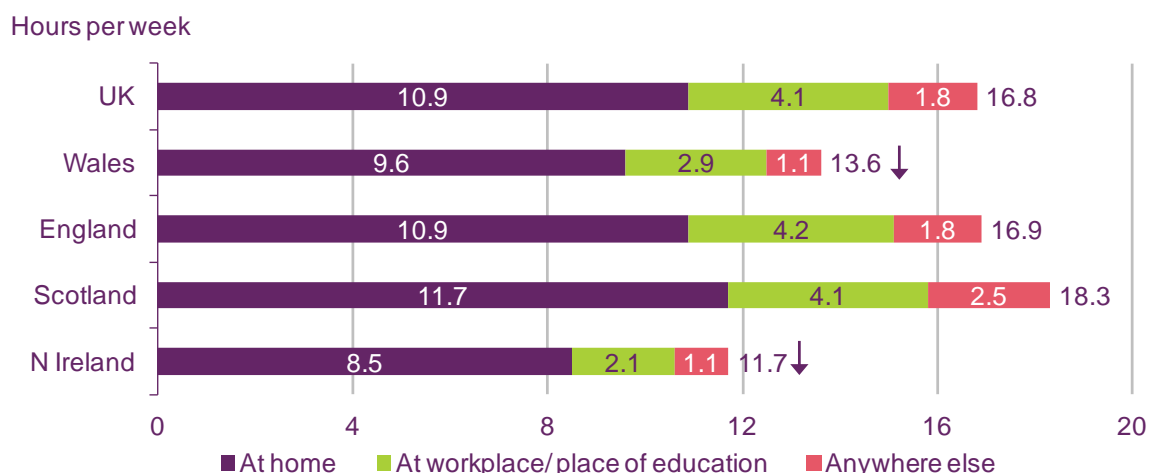
Base: Internet users aged 16+ (n = 2918 UK, 361 Wales, 172 Wales urban, 189 Wales rural, 130 16-34, 126 35-54, 105 55+, 191 ABC1, 170 C2DE, 109 under £17.5K, 129 £17.5K+). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "Netbook", "Games console", "Other device", "None" and "don't know".

4.3 Internet use

Internet users in Wales claim to spend significantly less time online than the UK average

According to research conducted for Ofcom's *Adult Media Literacy Report*, internet users in Wales claim to spend 13.6 hours on the internet per week. This is significantly lower than the UK average of 16.8 hours. Following a similar pattern as the rest of the UK, internet users claim to spend the majority of their time online at home, followed by their workplace or place of education, and the least time online in any other location.

Figure 4.5 Claimed time spent on the internet in a typical week



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012

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)

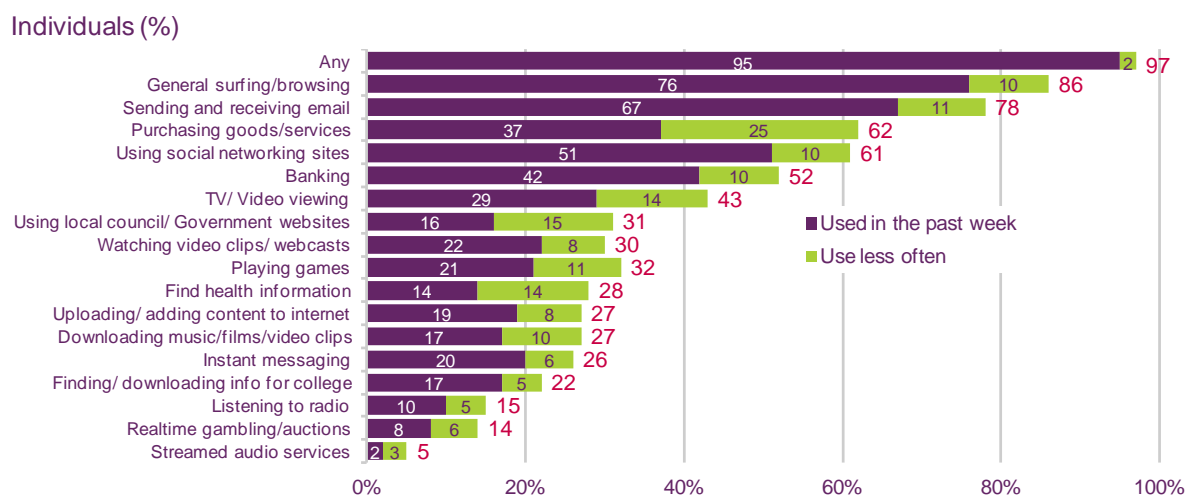
Base: All adults aged 16+ who use the internet at home or elsewhere (1381 UK, 857 England, 183 Scotland, 177 Wales, 164 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Two-fifths of broadband users in Wales shopped online in the past week

Almost nine in ten internet users (86%) in Wales use the internet for general browsing and surfing, and of the more specific activities asked about, sending and receiving email (78%) is the most popular, with 67% of internet users having done this in the past week.

Purchasing goods and services online is the second most popular specific use of the internet (62%), with two in five broadband users having done this in the past week (37%). Visiting social networking sites (51%) and internet banking (42%) are other popular weekly activities among internet users in Wales.

Figure 4.6 Use of online applications among broadband users in Wales



Source: Ofcom research, Q1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 361 Wales 2013)

QE5. Which, if any, of these do you use the internet for? Note figures in the chart below are not directly comparable to figures on internet from previous years due to changes in question wording