

2008 ANNUAL SURVEY ON INFOCOMM USAGE IN HOUSEHOLDS AND BY INDIVIDUALS

- EXECUTIVE SUMMARY

Background

The 2008 Annual Survey on Infocomm Usage in Households and by Individuals (“Survey”) is the 13th in its series conducted by IDA since the 1990s. The objective of the Survey is to assess the extent of infocomm adoption and usage in Singapore resident households¹ and residents².

Survey Methodology

Data was collected from 5,000 resident households and 5,000 residents via face-to-face interviews conducted from October to April 08. The sample was selected from the National Dwelling Database maintained by the Singapore Department of Statistics, using a two-stage stratified design to maintain a random and representative sample.

Report Structure

This report presents the key findings to the following areas:

Part A: Infocomm access in households.

Part B: Infocomm adoption and usage by residents.

Notes on Data

Past years’ data are included for comparison purposes where available. Due to the rounding of figures to the nearest whole number, the sum of individual figures may not add up to 100%.

In addition to this executive summary, a fuller report comprising more detailed information can be downloaded from IDA’s website under the ‘Facts and Figures’ Section.

¹ Only households with at least one resident (Singapore Citizen or Permanent Resident) were interviewed; households comprising wholly of foreigners were not interviewed.

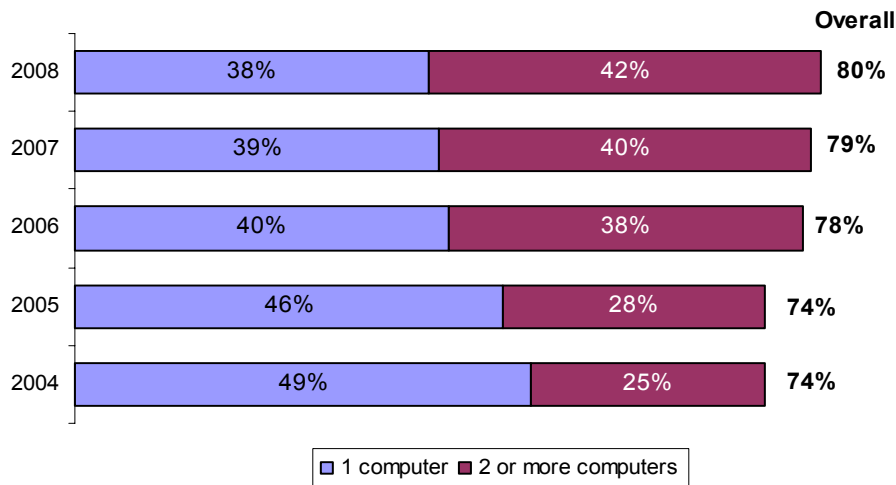
² Refer to Citizens and Permanent Residents.

A. INFOCOMM ACCESS IN HOUSEHOLDS

A1. Home Computer Access

About 80% of households in Singapore had access to least one computer at home (Chart A1.1).

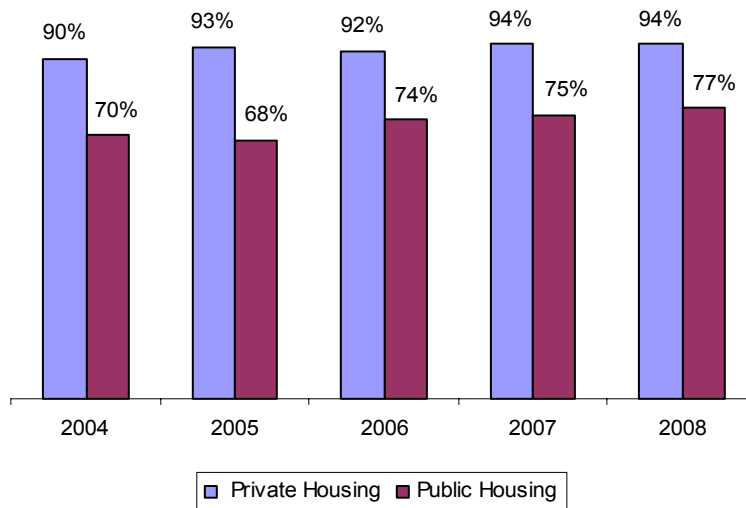
Chart A1.1: Computer Access at Home, 2004 – 2008



Base: Total resident households

Home computer access for households in private housing³ remained higher than that for households in public housing⁴ (Chart A1.2).

Chart A1.2: Home Computer Access by Housing Type, 2004 – 2008



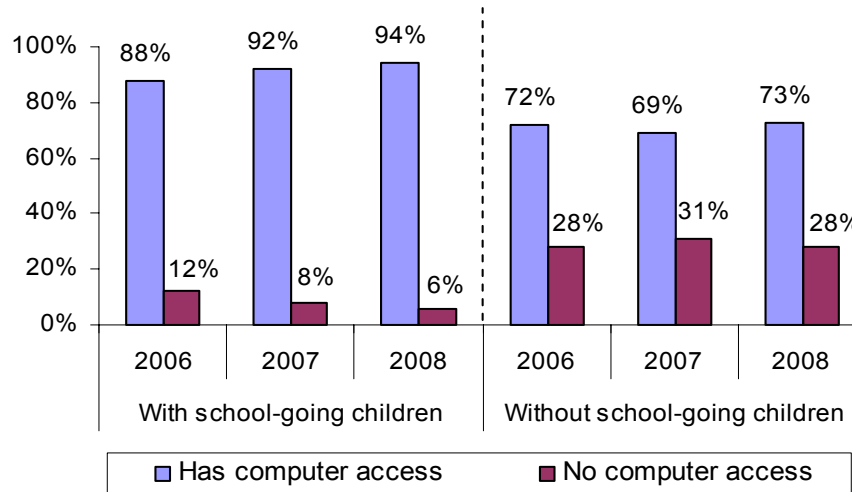
Base: Total resident households

³ Private housing refers to landed properties, private condominiums and apartments.

⁴ Public housing refers to HDB flats.

Amongst households with school-going children⁵, 94% had access to a computer at home (Chart A1.3).

Chart A1.3: Home Computer Access by Type of Household, 2006 – 2008



Base: Total resident households

In general, the top two reasons flagged out by households for not having access to a computer at home were “No need to use” and “Lack of skills” (Table A1.1).

Table A1.1: Main Reason for Not Having Access to a Computer at Home, 2004 – 2008

| No | Main Reason | 2004 | 2005 | 2006 | 2007 | 2008 |
|----|---|------|------|------|------|------|
| 1 | No need to use | 42% | 35% | 43% | 46% | 38% |
| 2 | Lack of skills | 19% | 32% | 20% | 29% | 32% |
| 3 | Too costly to purchase a computer | 16% | 15% | 17% | 11% | 14% |
| 4 | Old age is a barrier to learn computer skills | 9% | 12% | 8% | 7% | 13% |
| 5 | Children are too young | 3% | 6% | 4% | 2% | 3% |

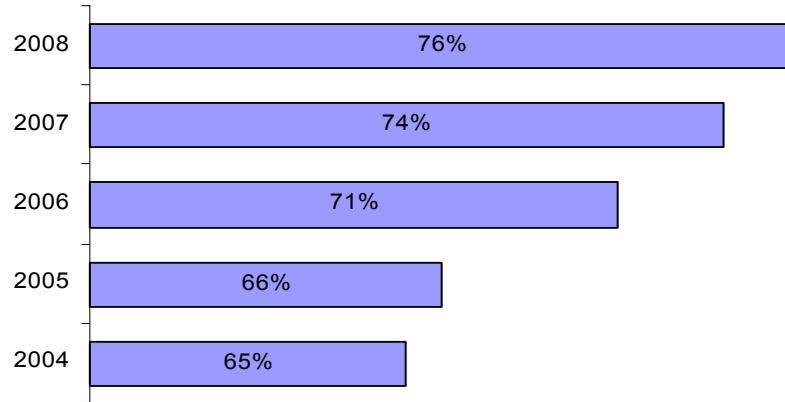
Base: Resident households that did not have access to a computer at home

⁵ School-going children refer to current students who are enrolled between primary education and pre-university/junior college education level.

A2. Internet Access at Home

The proportion of households with Internet access reached 76% (Chart A2.1).

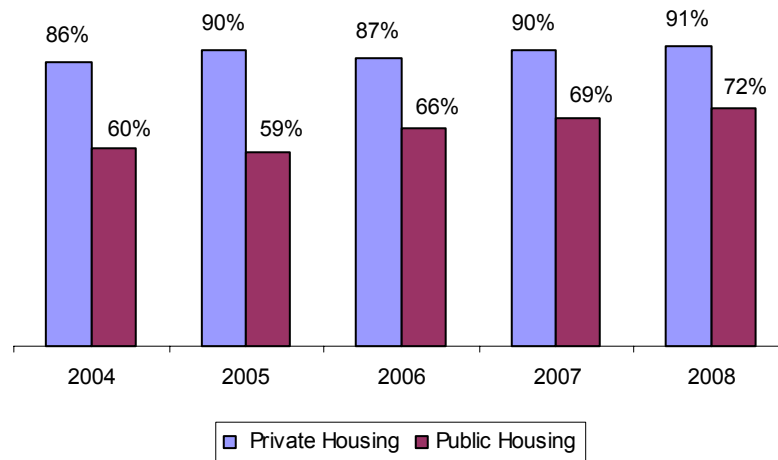
Chart A2.1: Households with Internet Access at Home, 2004 –2008



Base: Total resident households

Mirroring the trend for computer access, home Internet access for households in private housing was higher than that for households in public housing (Chart A2.2).

Chart A2.2: Households with Internet Access at Home by Housing Type, 2004 – 2008



Base: Total resident households

Similar to the reasons for not having computer access at home in Table 1, “Lack of interest / no need to use” and “Lack of knowledge / skills / confidence” were the most commonly cited reasons by households that did not have Internet access at home (Table A2.1).

Table A2.1: Main Reason for Not Having Internet Access at Home, 2004 – 2008

| No. | Main Reason | 2004 | 2005 | 2006 | 2007 | 2008 |
|-----|--|------|------|------|------|------|
| 1 | Lack of interest / No need to use | 24% | 27% | 43% | 55% | 50% |
| 2 | Lack of knowledge / skills / confidence | 11% | 6% | 18% | 11% | 23% |
| 3 | Have access to Internet elsewhere | 29% | 17% | 7% | 9% | 13% |
| 4 | Costly equipment costs | 6% | - | 14% | 8% | 8% |
| 5 | Subscription to the Internet is too costly | 12% | 29% | 4% | 3% | 4% |

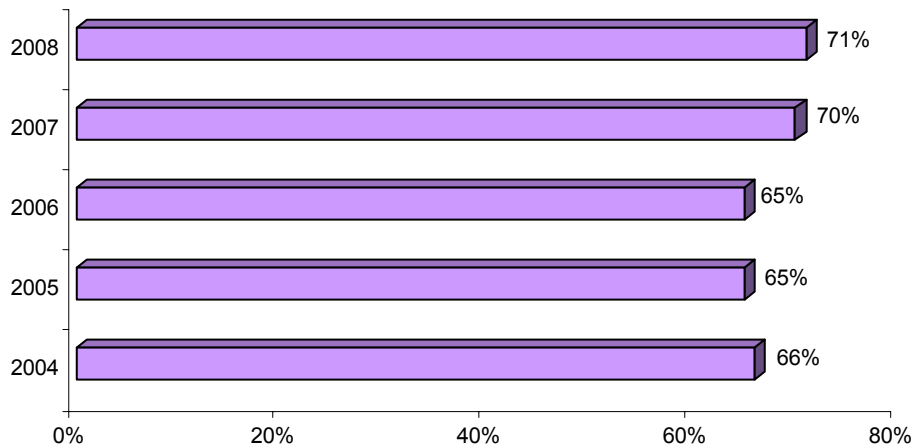
Base: Resident households that did not have access to Internet at home

B. INFOCOMM ADOPTION AND USAGE BY RESIDENTS

B1. Computer and Internet Users⁶

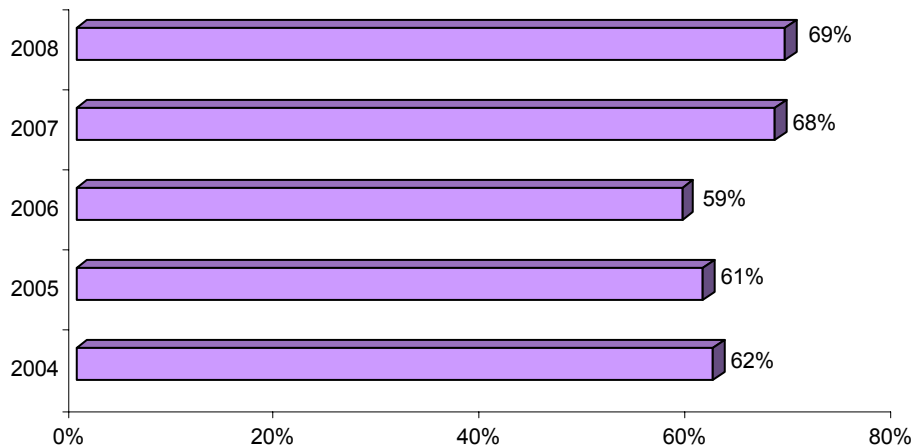
In 2008, the proportion of computer and Internet users amongst residents aged 7 and above was 71% and 69% respectively (Chart B1.1 and Chart B1.2).

Chart B1.1: Proportion of Computer Users, 2004 – 2008



Base: Residents aged 7 and above in 2008. For 2004–2007, residents aged 15 and above.

Chart B1.2: Proportion of Internet Users, 2004 – 2008



Base: Residents aged 7 and above in 2008. For 2004–2007, residents aged 15 and above.

⁶ Computer and Internet users are defined as residents who have used the computer or Internet in the last 12 months.

The most common Internet activity engaged by Internet users in 2008 was sending or receiving of emails followed by general web browsing (Table B1.1).

Table B1.1: Top Primary Internet Activities Engaged by Internet Users, 2008

| No. | Internet Activity | 2008 |
|-----|---|------|
| 1. | Sending or receiving emails | 61% |
| 2. | General web browsing | 23% |
| 3. | Getting information about goods and services | 20% |
| 4. | Instant messaging | 19% |
| 5. | Access documents/applications/collaborative tools from the office server (for work) | 16% |
| 6. | Social networking | 14% |
| 7. | Reading online newspaper | 13% |
| 8. | Checking account information | 13% |
| 9. | Education or training activities | 12% |
| 10. | Interactive online gaming | 11% |

Base: Residents aged 7 years and above who had used the Internet in the last 12 months

Table B1.2 shows the main reasons cited by non-Internet users for not using the Internet before. The most commonly cited reason was 'Lack of knowledge, skills or confidence'.

Table B1.2: Main Reason for Not Using the Internet, 2007 – 2008

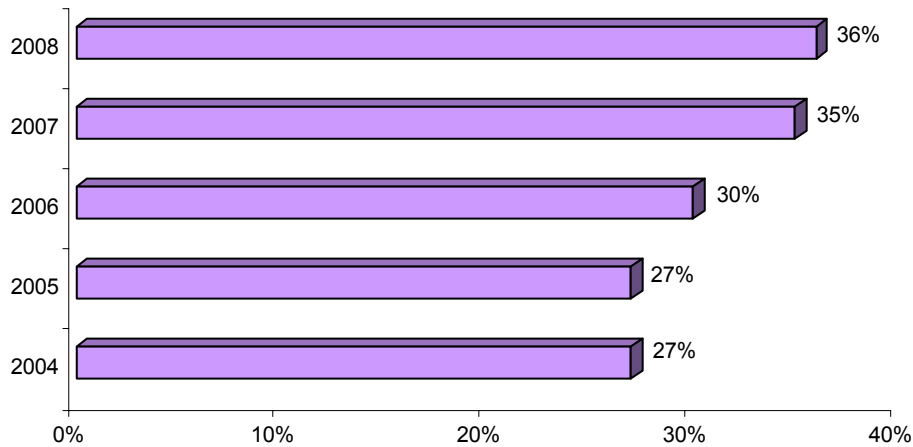
| No. | Main reason for not using the Internet | 2007 | 2008 |
|-----|--|------|------|
| 1. | Lack of knowledge, skills or confidence | 28% | 52% |
| 2. | Not interested / No need to use | 60% | 45% |
| 3. | Equipment costs are too high | 5% | 1% |
| 4. | Access subscription too costly | 1% | 1% |
| 5. | Concern about exposure to inappropriate or harmful content | 0% | 1% |
| 6. | Others | 5% | 0% |
| | Total: | 100% | 100% |

Base: Residents aged 7 years and above who had never used the Internet before

B2. Online Shoppers

The proportion of online shoppers⁷ increased slightly to 36% in 2008 (Chart B2.1).

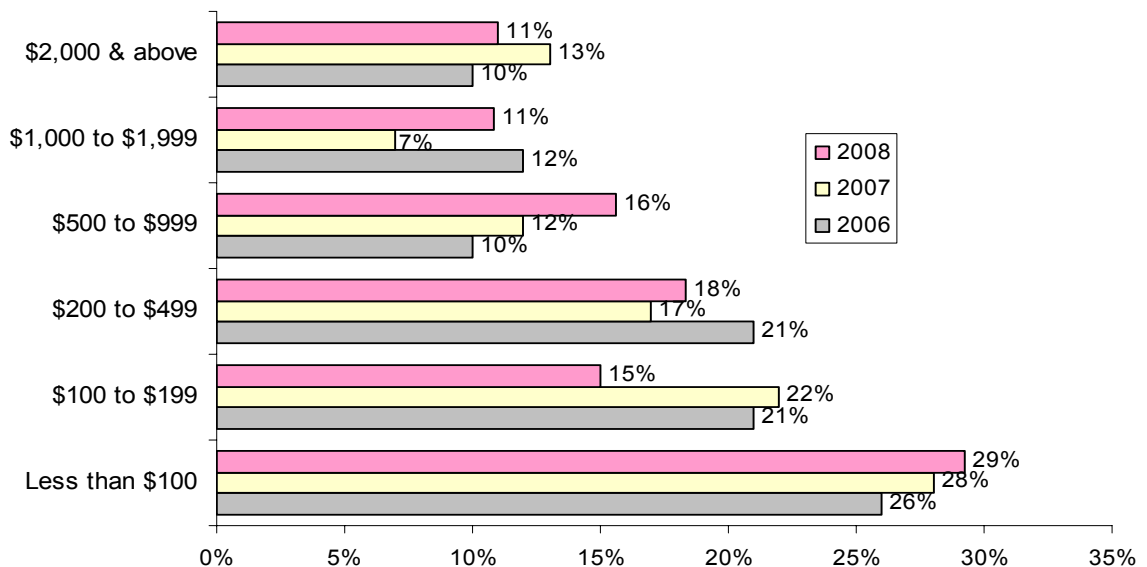
Chart B2.1: Proportion of Online Shoppers, 2004 – 2008



Base: Internet users aged 15 and above who had ever made an online purchase

A higher proportion of online shoppers spent between \$200 and \$1,999 for their online purchases in 2008 compared to 2007 (Chart B2.2).

Chart B2.2: Value of Online Purchases, 2006 – 2008



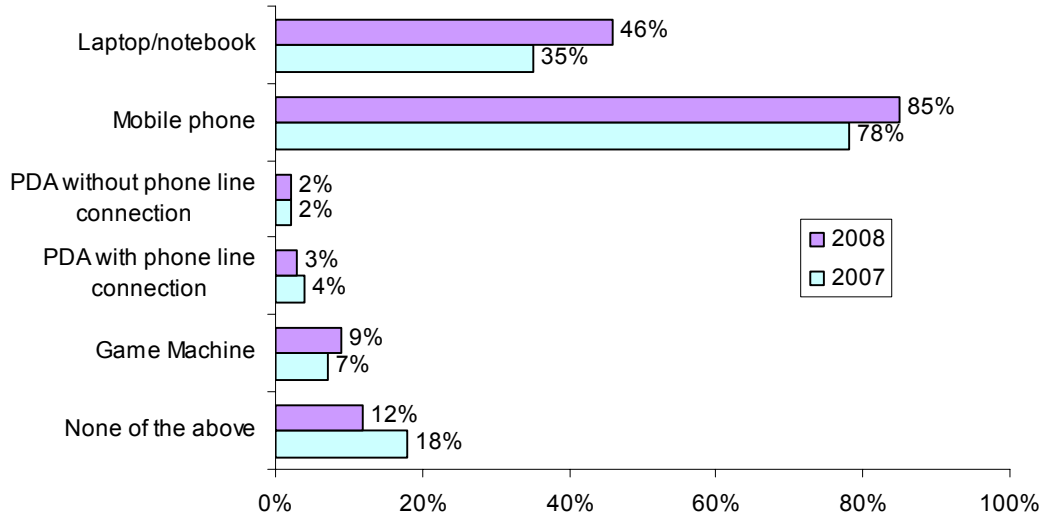
Base: Online shoppers who had made at least one online purchase in the last 12 months

⁷ An online shopper is a resident who had bought or ordered goods or services over the Internet before.

B3. Usage of Portable Infocomm Equipment

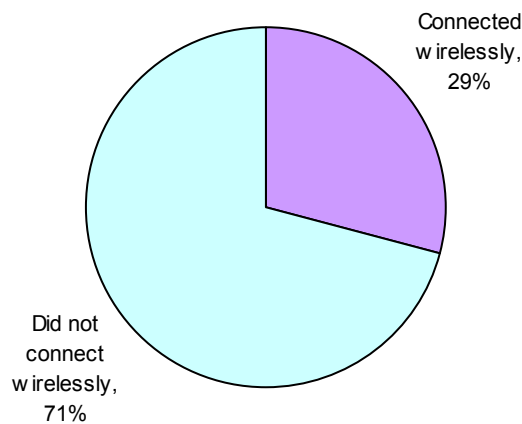
More residents are using portable equipment with notable increase in the use of laptops/notebooks and mobile phones in 2008 (Chart B3.1). Out of these residents, 29% of them connected to the Internet wirelessly using their portable equipment (Chart B3.2).

Chart B3.1: Portable Equipment Used, 2007 – 2008



Base: Residents aged 7 and above

Chart B3.2: Portable Equipment Used to Connect Wirelessly, 2008

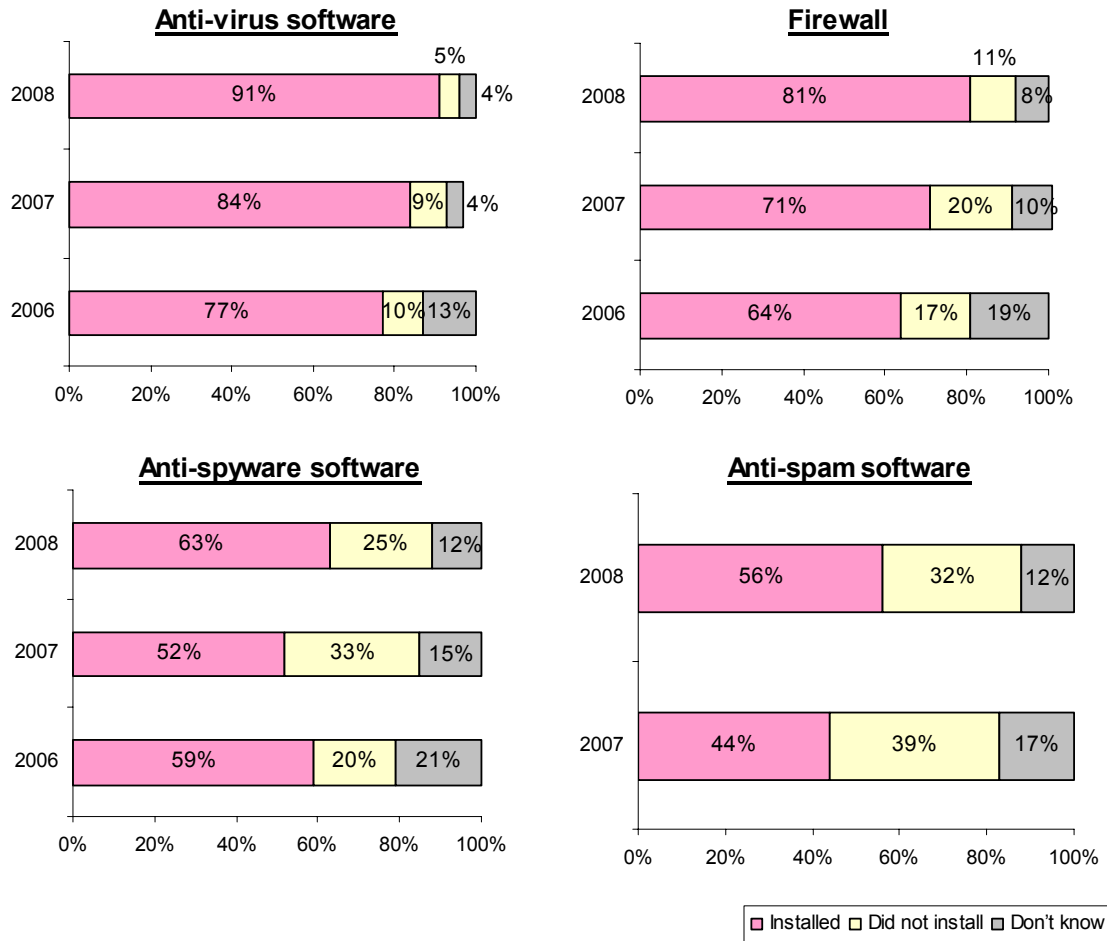


Base: Residents aged 7 and above who had used any portable equipment in the last 12 months

B4. Home Internet Security

Chart B4.1 shows an increase in the usage of Internet security software (firewall, anti-virus, anti-spyware and anti-spam software) in 2008 compared to the previous two years.

Chart B4.1: Usage of Internet Security Software, 2006 – 2008



Base: Internet users aged 15 and above who had used the Internet at home via a computer in the last 12 months