

ANNUAL SURVEY ON INFOCOMM USAGE IN HOUSEHOLDS AND BY INDIVIDUALS FOR 2017



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PART I:
SURVEY OBJECTIVE AND METHODOLOGY

1. Survey Objective

The Annual Survey on Infocomm Usage in Households (“Survey”) has been conducted by IMDA since the 1990s. The objective of the Survey is to assess the extent of infocomm adoption in Singapore resident households¹ and residents.

2. Methodology

Data was collected from about 4,000 households and about 4,000 residents via face-to-face interviews. The sample of addresses for household was provided by the Singapore Department of Statistics based on a random selection using a two-stage stratified design by geographical location and housing type. The sample of individuals was provided by Ministry of Home Affairs based on stratified random sampling design by age and ethnicity group. Fieldwork for the survey was conducted between February to June 2017.

3. Concepts and Definitions

The definitions of the key terms used in this report are as follows:

Term	Definition
Household	Household refers to a group of two or more persons living together in the same house and sharing common food or other arrangements for essential living. It also includes a person living alone or a person living with others but having his own food arrangements. Although persons may be living in the same house, they may not be members of the same household.
Resident	Singapore Citizen or Permanent Resident.
Resident Household	Resident households are households with at least one resident (Singapore Citizen or Permanent Resident).
School-going children	School-going children refer to current students who are enrolled between primary education and pre-university / junior college education level.
Computer	Computer includes desktops, laptops, notebooks and tablets.
Computer access at home	Refers to having access to functional computers at home regardless of ownership (i.e. they may be owned by the household or employers and used at home).
Computer ownership	Computer ownership refers to computer owned by household.
Private housing	Private housing refers to landed properties, private condominiums and apartments.

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

Term	Definition
Public housing	Public housing refers to HDB flats.
Broadband	Internet connection speeds equal to, or greater than, 256 kbit/s, in one or both directions and includes connections using ADSL, cable modem, 3G, 3.5G/HSDPA and fibre broadband.
ADSL	Asymmetric Digital Subscriber Line (ADSL), a form of DSL is a data communications technology that enables data transmission over copper telephone lines.
Cable modem	A modem designed to operate over cable TV lines and enables Internet access.

4. 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 the total or 100%.

PART II:

**SURVEY FINDINGS – INFOCOMM ACCESS IN
HOUSEHOLDS, AND INFOCOMM ADOPTION
AND USAGE BY INDIVIDUALS**

Summary

(A) Household

Continued growth of Household Internet and broadband access over the years and Internet-enabled phones replaced computers as the top equipment of choice for accessing internet at home

- Home computer, internet and broadband access rates were 86.6% (up from 85.7% in 2015), 91.1% and 90.8% respectively in 2017, about three percentage-points higher than that of 2015. (87.7% and 87.5%)
- For households with school-going children, Internet and broadband access rates were both 98% in 2016, up by one percentage-point than that of 2015 and 2016.
- Fibre broadband continued to replace ADSL and cable modem as the Internet connection choice by households with 79% of resident households using fibre broadband in 2017 (up from 62% in 2015), and 9% using cable modem in 2017 (down from 18% in 2015).
- Internet-enabled phones (97%) replaced computers (94%) as the top equipment of choice for accessing internet at home. 47% of resident households used other internet-enabled devices such as Smart TV to access the internet, a 29 percentage-point increase since 2013.
- “No need to use” and “Lack of skills” remained as the main reasons for not having access to a computer or Internet.

(B) Individual

Internet usage by senior citizens saw significant growth from 2016

- In 2017, about 74% of residents used the computer in the last three months (defined as computer users) with higher proportion of usage reported by younger residents aged 7-34 years old.
- Computer usage rate by senior citizens aged 60 & above increased by 1 percentage-point from 2015 to 28% in 2017.

- In 2017, about 84% of residents used the Internet in the last three months (defined as Internet users) and almost all residents aged below 35 years old were internet users.
- Internet usage rate by senior citizens aged 50-59 and 60 & above rose to 85% and 42% respectively in 2017, both an increase of 12 percentage-points from 2015 respectively.
- In 2017, about nine in ten senior citizens and more than half of senior citizens aged 50 to 59 years, and 60 years and above respectively used a smartphone² in the past three months. This represented an increase of 12 and 22 percentage-points for the two age groups respectively from 2015.
- In 2017, among residents who had used portable infocomm equipment in the past three months, 79% and 73% of those aged 50 to 59 years, and 60 years and above, respectively, connected to the Internet wirelessly. This was an increase of 12 percentage points and more than two-fold increases compared to 2015 where the proportions were 67% and 31% respectively.
- More than half of the senior citizens learnt their computer/Internet skills from family members, the most common source of knowledge.

Top three primary internet activities among Singapore residents were related to communication, leisure and getting information;

- The top three primary Internet activities³ of Internet users remained the same over the last three years, and were related to communication, leisure activities and getting information. The most commonly cited reason for not using the Internet remained as “*Lack of knowledge, skills or confidence*”.
- Using instant messaging remained as the top mobile online activity in 2017, consistently over the last 2 years.

² A smartphone has more sophisticated functions than a feature phone. Examples of such functions are: i) able to open and read documents (e.g. pdf, office document) and ii) able to add / install applications on phone. These two categories are mutually exclusive, i.e. a mobile phone can only be a feature phone or a smartphone.

³ A primary Internet activity refers to an activity that is engaged in during all or most of the Internet sessions.

Online shopping was on the rise and online shoppers were mainly aged 15-49, and most popular items purchased were apparels, travel products and tickets for entertainment events

- Number of Singapore residents shopping online in 2017 was about 1.84 million, and increased by a compound annual growth rate of about 13% from 2015.
- Consistently over the last three years, online shoppers were mainly from the 15-49 age group.
- 40% of e-consumers in Singapore ordered goods or services from other Asian countries.
- More than seven in ten online shoppers paid for online purchases using credit cards and credit card payment was the most common among those aged 35 and above.
- The three most popular items purchased online were apparels, travel products and tickets for entertainment events.
- Majority of the online shoppers (about 7 in 10) spent at least \$100 on their online purchases.
- The most commonly cited reasons for not shopping online were “*Prefer to shop in person or deal personally with a service provider*” followed by “*Not interested*”.

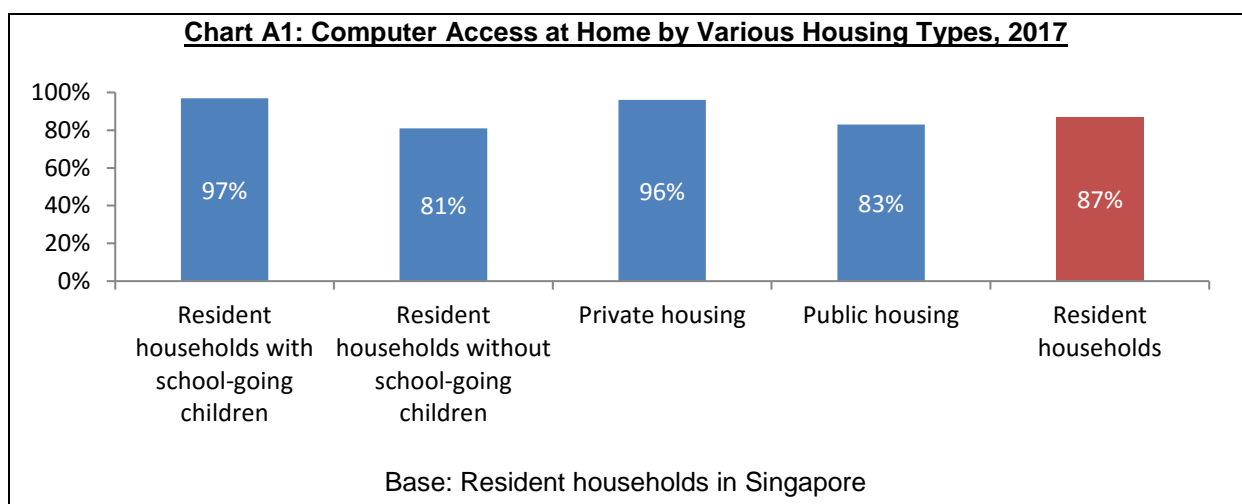
About 8 in 10 Singapore Residents installed anti-virus software and security updates on computer used to access the Internet at home and adoption rates of anti-virus software installation on smartphones saw significant growth

- Adoption rates of Internet security measures on home computer was similar to 2015 and 2016, with about 8 in 10 having installed anti-virus software and security updates on computer used to access the Internet at home.
- Among smartphone users who had connected to the internet in the past three months, about 3 in 10 installed anti-virus software for smartphones, about 8 percentage-point decline from 2016.
- The main reason cited by non-adopters was “*Don't think that the protection is necessary*”, regardless of whether they accessed internet via computers or smartphones.

A. Computer, Internet and Broadband Access within Households

About 87% of resident households had computer access, and about 97% of households with school-going children had computer access at home.

Computer access in resident households was 87% in 2017. A higher proportion of households with school-going children had computer access at home as compared to households without school-going children (Chart A1).



“Lack of skills” and “no need to use” were the top two reasons for households not having access to a computer in the last three years.

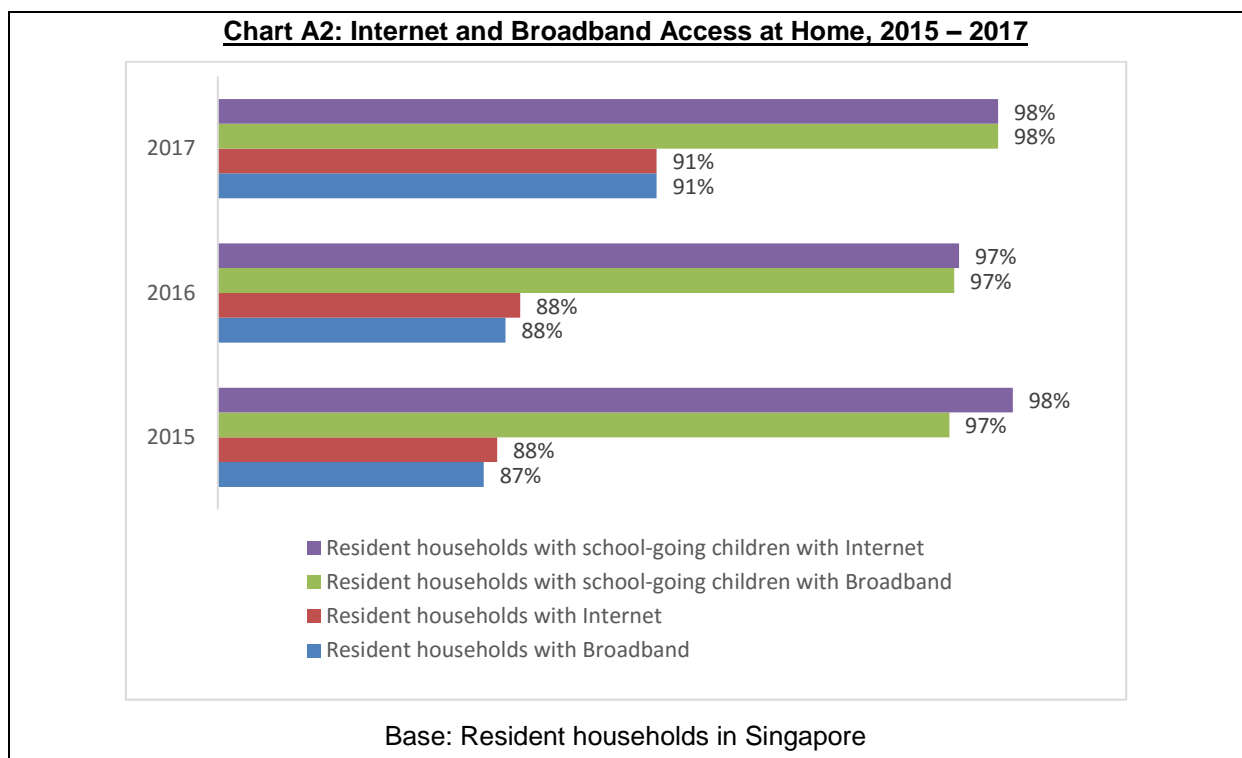
Table A1: Main Reason for not Having Access to a Computer at Home, 2015 – 2017

No.	Main Reason	2015	2016	2017
1	Lack of skills	32%	45%	23%
2	No need to use	32%	26%	33%
3	Old age is a barrier to learn computer skills	18%	11%	17%
4	Usually use mobile phone to access Internet	8%	6%	10%
5	Too costly to purchase a computer	6%	8%	9%

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

Growing household internet and broadband access over the years

Home internet and Broadband access rates were 91.1% and 90.8% respectively in 2017, about three percentage-points higher than 2015. For households with school-going children, Internet and broadband access rates were both 98% in 2016, about one percentage point higher than 2015 and 2016. (Chart A2)

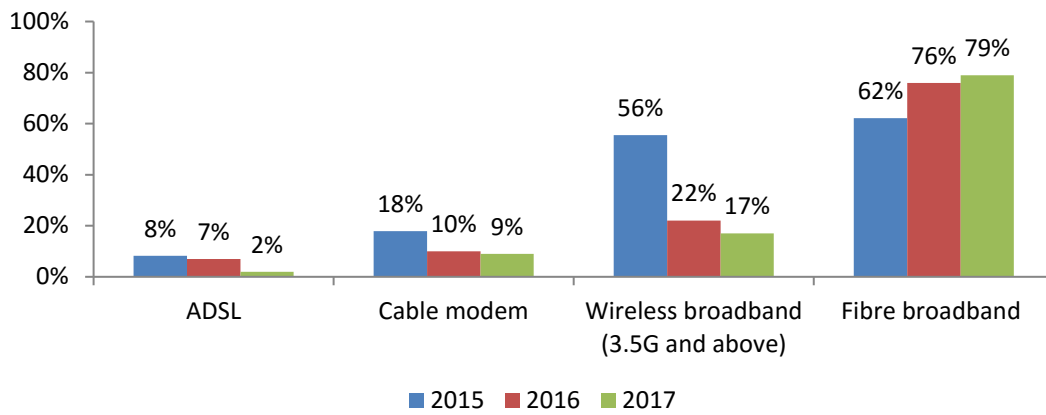


About 4 in 5 resident households had fibre broadband internet connection at home

Fibre broadband continued to be the top Internet connection of choice used by 79% of resident households, about 17 percentage-points higher than 2015. The proportion of households using wireless broadband⁴ decreased by 5 percentage-points than 2016 to 17%, this decrease could be due to the switch to fibre broadband (Chart A3).

⁴ Wireless broadband comprises 3G, 3.5G/HSDPA; fixed broadband comprises ADSL, cable modem and fibre broadband.

Chart A3: Type of Internet Connection within Households⁵, 2015 – 2017

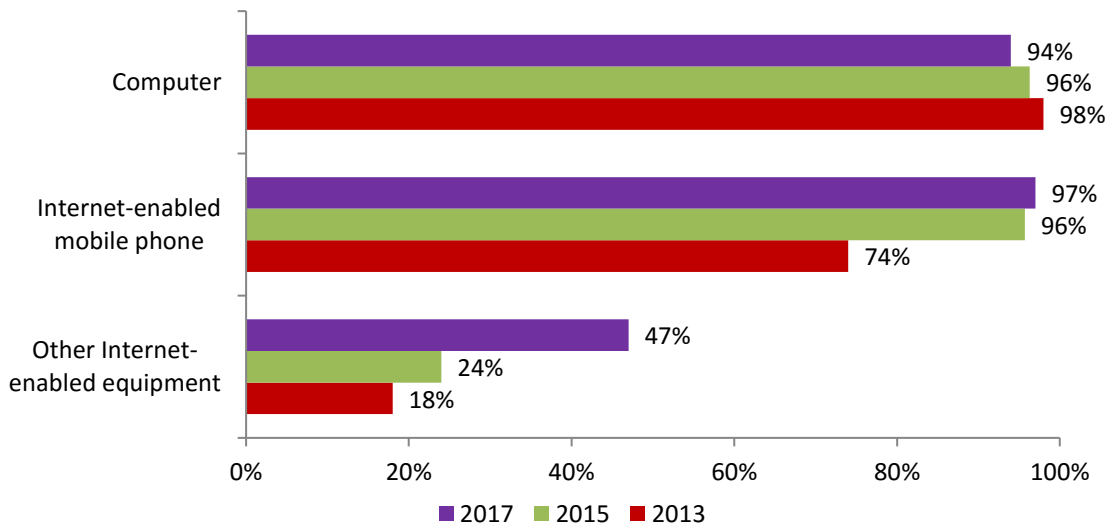


Base: Resident households with Internet access at home

Internet enabled phones replaced computers as the top equipment of choice for accessing internet at home

In 2017, about 97% and 47% resident households reported using an Internet-enabled mobile phone and other internet-enabled equipment (e.g. Game console with internet connection, Smart TV, internet-enabled MP3/MP4 and Network Attached Storage) to access the Internet at home respectively (Chart A4). The increasing usage of internet-enabled phone over the years has resulted in the replacement of computers as the top choice of equipment for assessing internet at home.

Chart A4: Equipment Used to Access to the Internet at Home, 2013 – 2017



Base: Resident households with Internet access at home

⁵ Households with access to the Internet via both broadband and narrowband had been categorised as those with broadband Internet access. Please note that some households may have more than one type of broadband connection at home.

“Lack of interest/no need to use” and “lack of knowledge/skills/confidence” remained the top two reasons for households without internet access over the last three years

Households without home Internet access continued to cite “*Lack of interest/no need to use*” and “*Lack of knowledge/skills/confidence*” as the top two reasons for not using the Internet in 2017. Similarly, they were the most commonly cited reasons by non-Internet users in 2015 and 2016. (Table A2).

Table A2: Main Reason for not Having Internet Access at Home, 2015 – 2017

No.	Main Reason	2015	2016	2017
1	Lack of interest/No need to use	47%	65%	64%
2	Lack of knowledge/skills/confidence	37%	12%	16%
3	Costly equipment costs	3%	6%	5%
4	Have access to Internet elsewhere	7%	5%	9%
5	Subscription to the Internet is too costly	1%	1%	3%

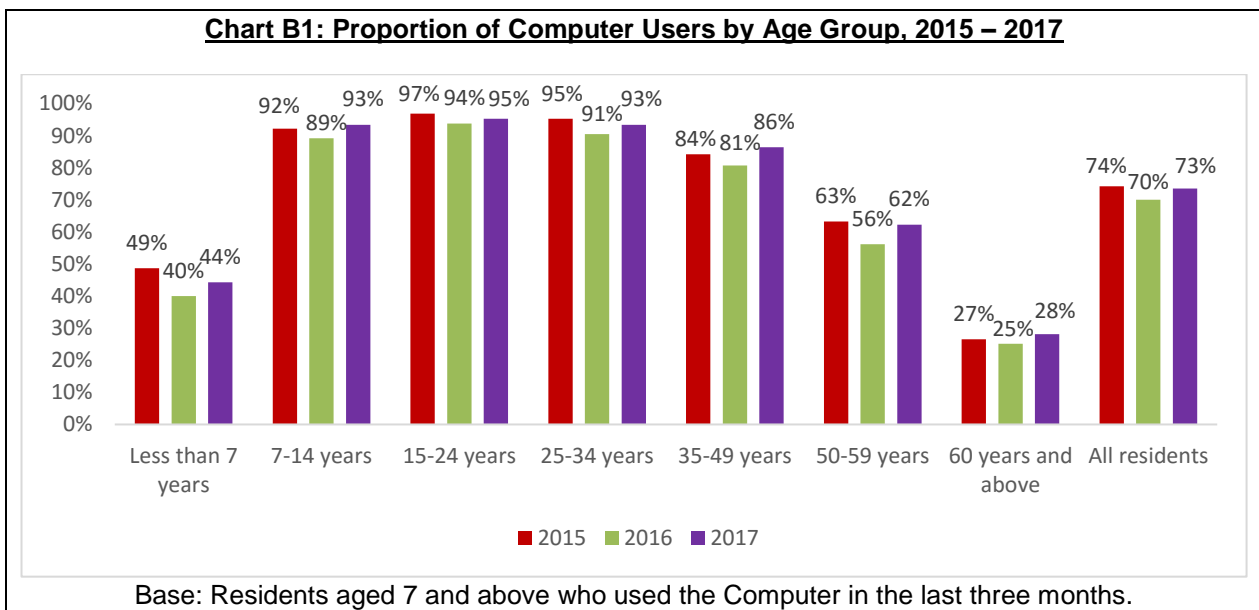
Base: Resident households that did not have access to internet at home

B. Recent Computer and Internet Usage by Individuals

Slight increase in computer usage rates by residents from 2016

In 2017, about 74% of residents used the computer in the last three months (defined as computer users) with higher proportion of usage reported by younger residents aged 7-34 years old. (Chart B1).

Between 2016 and 2017, there was a noticeable 1-6 percentage-points increase in computer usage by individuals.

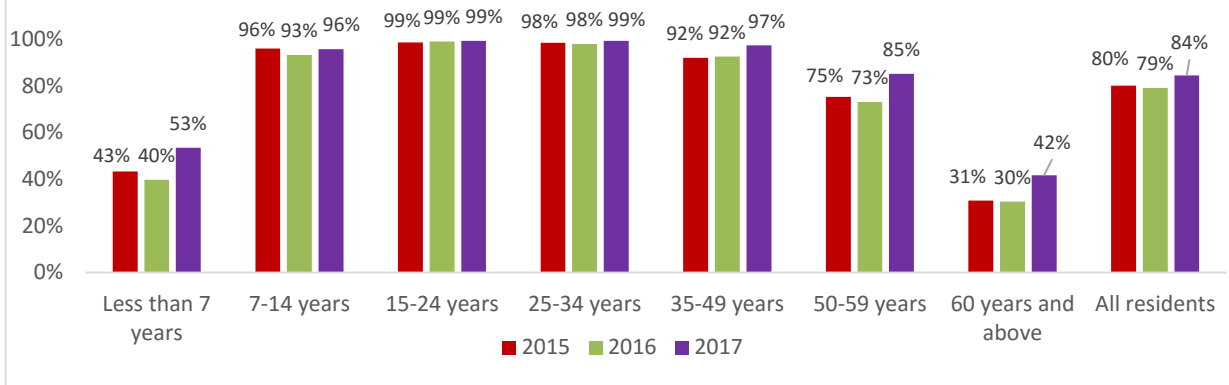


Internet usage rates rose significantly from 2016, especially among senior citizens and more than half of senior citizens learnt their computer/Internet skills from family members

In 2017, about 84% of residents used the Internet in the last three months (defined as Internet users) and almost all residents aged below 35 years old were internet users. The proportion of internet users across age groups in 2016 increased when compared to 2015.

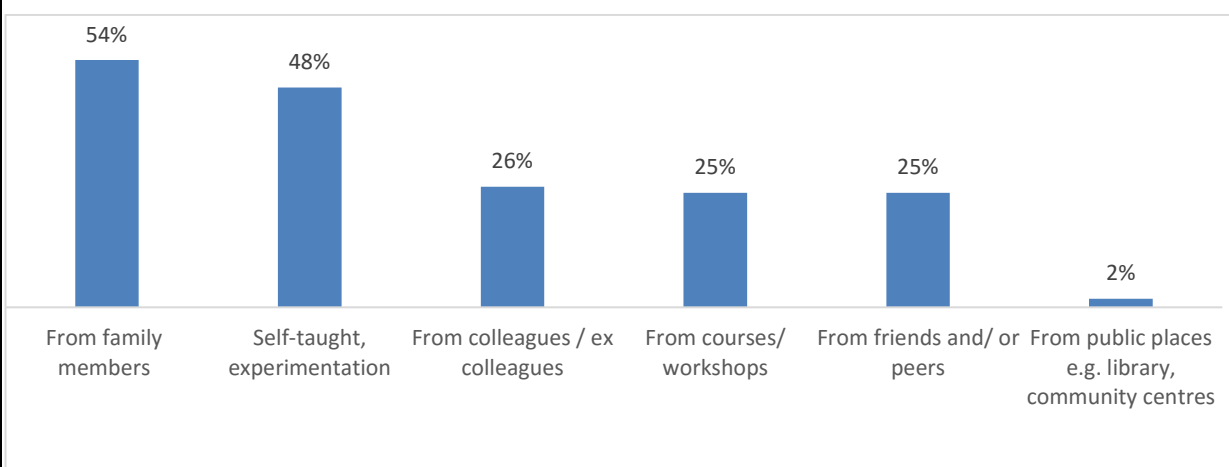
Between 2016 and 2017, 12 percentage-point increases in Internet usage were reported for both aged 50-59 and 60 & above to 85% and 42% respectively (Charts B2). More than half of the senior citizens learnt their computer/Internet skills from family members, the most common source of knowledge (Chart B3)

Chart B2: Proportion of Internet Users by Age Group, 2015 – 2017



Base: Residents aged 7 and above who used the Internet in the last 3 months.

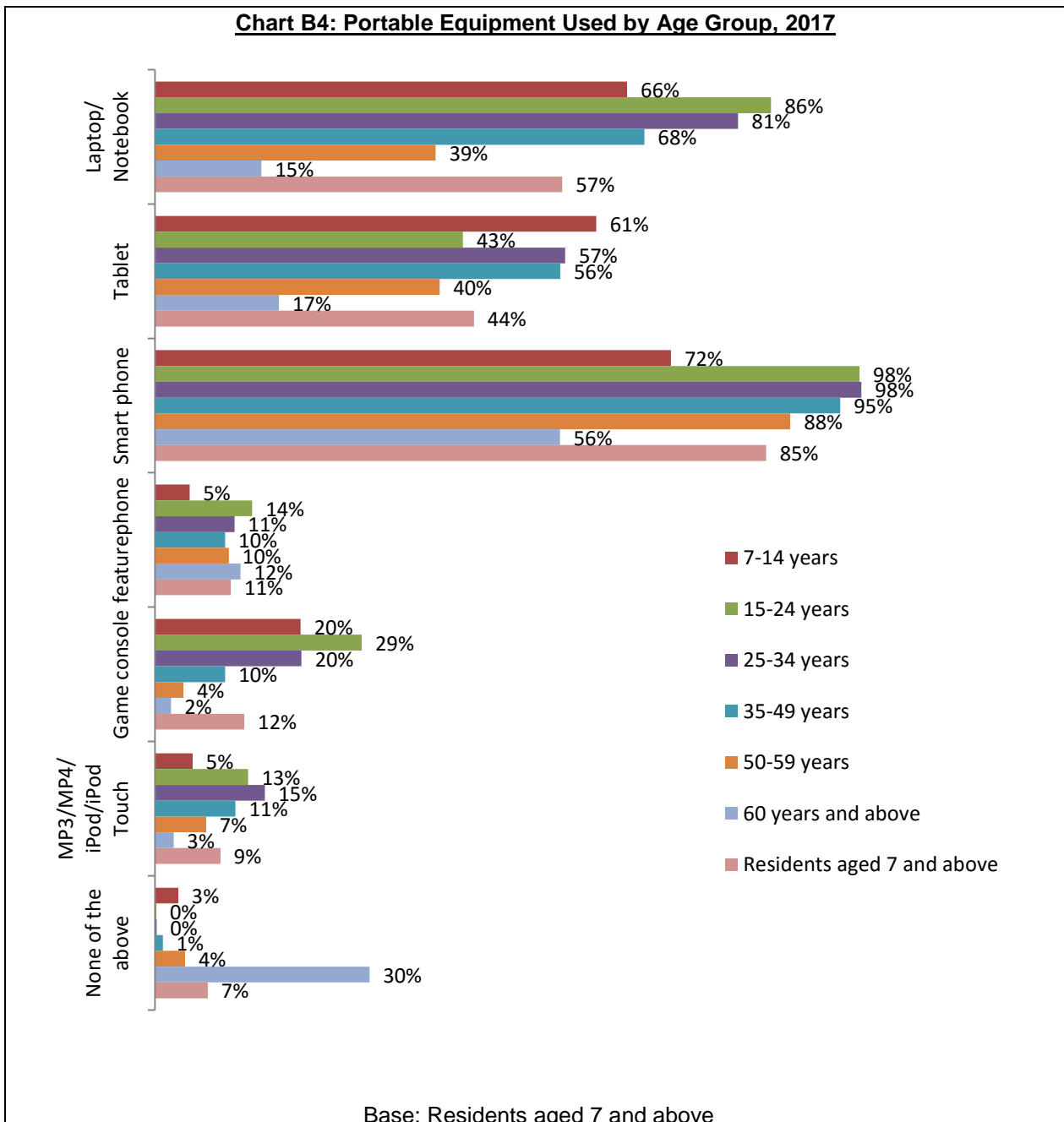
Chart B3: Where senior citizens learnt their computer/Internet skills, 2017



Base: Residents aged 50 and above who used the computer or internet in the last 3 months

Significant growth in senior citizens using smartphone to access the Internet since 2015

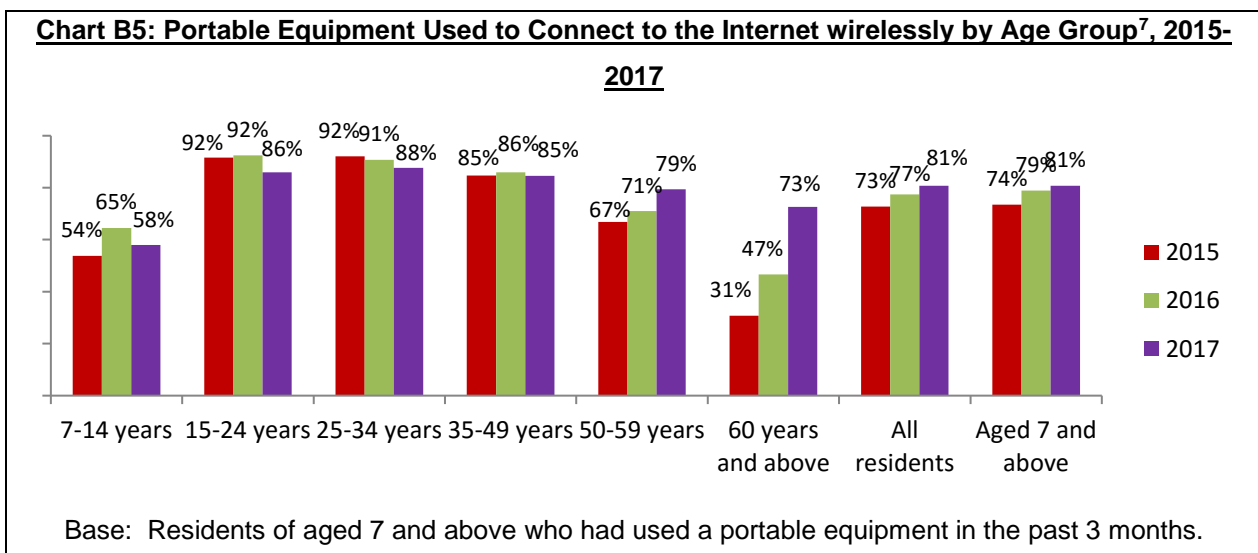
In 2017, about nine in ten and more than half of senior citizens aged 50 to 59 years, and 60 years and above respectively used a smartphone⁶ in the past three months. This represented an increase of 12 and 22 percentage-points for the two age groups respectively from 2015 (Chart B4). The highest smartphone usage was among residents aged 15 to 34 years old (91-92%).



⁶ A smartphone has more sophisticated functions than a feature phone. Examples of such functions are: i) able to open and read documents (e.g. pdf, office document) and ii) able to add / install applications on phone. These two categories are mutually exclusive, i.e. a mobile phone can only be a feature phone or a smartphone.

Significant growth in senior citizens using portable infocomm equipment to connect to the Internet wirelessly in 2017, when compared to 2015

In 2017, among residents who had used portable infocomm equipment in the past three months, 79% and 73% of those aged 50 to 59 years, and 60 years and above, respectively, connected to the Internet wirelessly (Chart B5). This was an increase of 12 percentage points and more than two-fold increases compared to 2015 where the proportions were 67% and 31% respectively.



Lack of knowledge, skills or confidence was still the top reason cited by non-internet users in 2017 (Table B1)

Table B1: Main Reason for not using Internet, 2015 – 2017

No.	Main Reason	2015	2016	2017
1	Lack of knowledge /skills / confidence	76%	71%	77%
	Do not know how to use computer, internet-enabled feature phone	26%	39%	47%
	Do not know how to use the internet	24%	26%	23%
	Lack of confidence	19%	2%	2%
	Language skills are inadequate	7%	4%	5%
2	Too old to learn	12%	14%	14%
3	Not interested / No need to use	10%	16%	9%

Base: Residents who had never used the internet before

⁷ Wireless connection excludes connection through a wireless router. It includes connection via public WiFi hotspots, 3G, GSM/GPRS and wireless broadband (e.g.3.5G/HSDPA, 4G/LTE).

Top three primary internet activities among Singapore residents were communication, leisure and getting information

The top three primary Internet activities⁸ of Internet users, consistently over the last three years, were related to communication, leisure activities and getting information (Table B2). There was a noticeable 3-18 percentage-points increase in the proportion using internet for the top 10 activities.

Table B2: Primary Internet Activity Groups of Internet Users, 2015 – 2017

Primary Internet Activity Group	Residents aged 7 and above		
	2015	2016	2017
Communication	83%	91%	94%
Leisure Activities	77%	84%	90%
Getting Information	63%	79%	84%
Online Banking	31%	51%	59%
Purchasing or ordering goods or services	27%	37%	55%
Education or learning activities	17%	21%	24%
Dealing with government organisations / public authorities	16%	34%	44%
Creating Content	8%	23%	26%

Base: Internet users aged 7 and above who had used the internet in the past 3 months

Using instant messaging was the top mobile online activity for the last 2 years, 2016 and 2017

In 2017, among online activities on mobile equipment⁹, communication (using instant messaging, and using social networks, and sending or receiving email) made up the top three activities (Table B3), consistently over the last 3 years.

Telephoning over the internet and purchasing and ordering of goods were new additions to the list of Top Ten Internet activities on mobile equipment in 2017, when compared to 2016.

⁸ A primary Internet activity refers to an activity that is engaged in during all or most of the Internet sessions.

⁹ Mobile equipment is defined as portable equipment excluding laptop/notebook.

Table B3: Top Ten Internet Activities on Mobile Equipment by Age Group, 2017

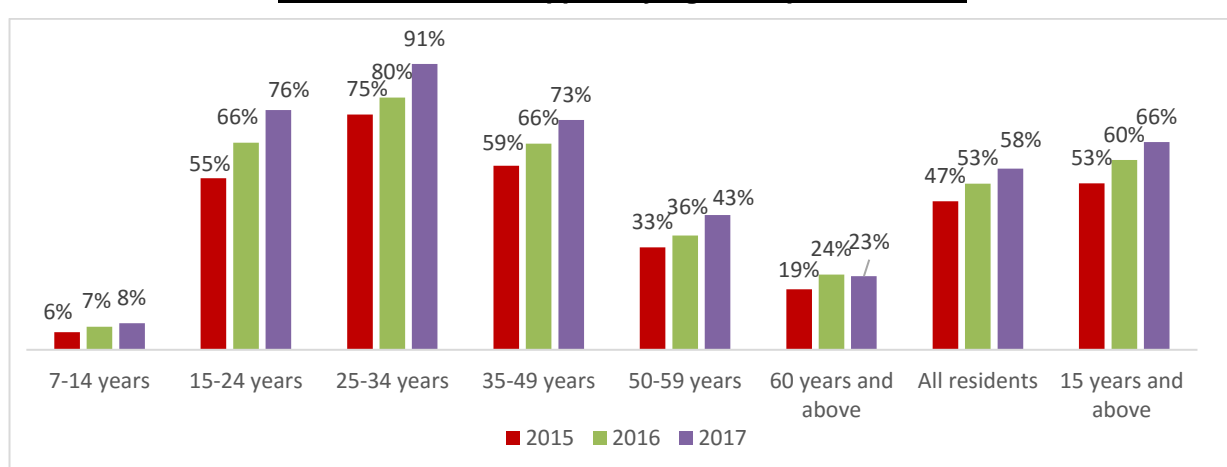
Activity	7-14 years	15-24 years	25-34 years	35-49 years	50-59 years	60 years & above	All age groups
Using instant messaging	54%	93%	93%	89%	77%	33%	74%
Using social networks	40%	92%	91%	79%	56%	20%	63%
Sending or receiving emails	24%	90%	92%	84%	54%	21%	63%
Getting information or general Web browsing	49%	78%	82%	76%	53%	20%	60%
Downloading or watching movies	55%	77%	72%	57%	43%	17%	52%
Telephoning over the internet (VoIP) – Voice (e.g. Skype, Whatsapp)	32%	69%	66%	61%	48%	21%	50%
Looking for directions	16%	66%	73%	64%	45%	15%	48%
About goods or services	8%	63%	82%	68%	39%	13%	48%
Reading online news	12%	61%	73%	62%	43%	17%	47%
Purchasing or ordering of goods	6%	66%	86%	65%	33%	8%	46%

Base: Residents aged 7 and above who had used mobile equipment in the past 3 months

Online shopping was on the rise and online shoppers were mainly from the 15-49 age group

In 2017, more than six in ten Internet users aged 15 and above who used the Internet in the past three months had made an online purchase before (defined as online shoppers). The number of online shoppers in 2017 was about 1.84 million, and increased by a compound annual growth rate of about 13% from 2015. In the last three years, the highest proportions of online shoppers came from Internet users in the age groups 25-34 years, followed by 15-24 years, and 35-49 years (Chart B6).

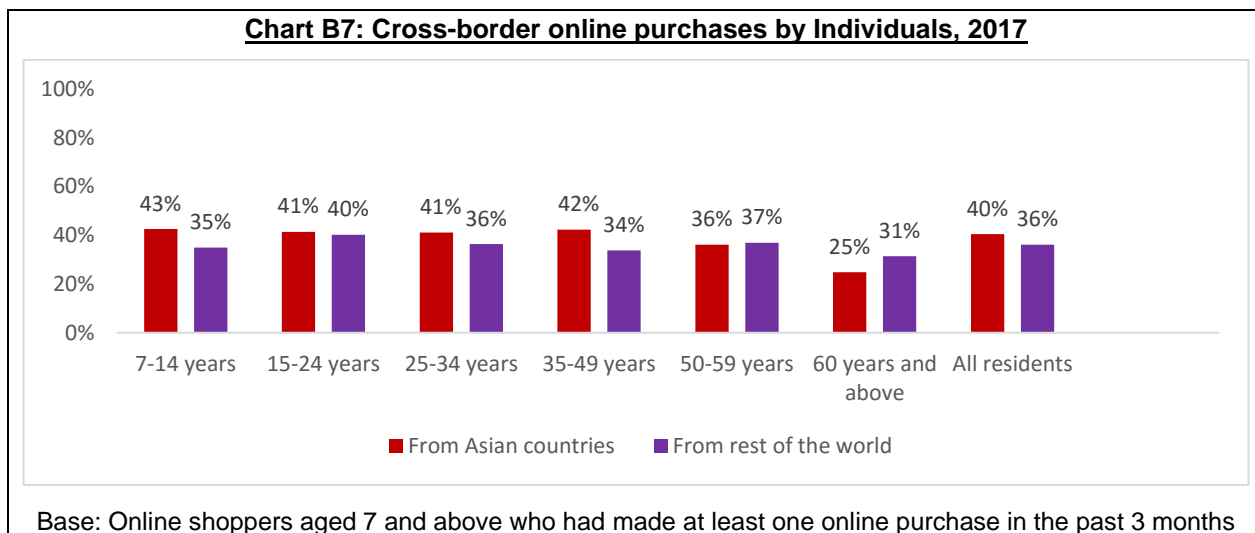
Chart B6: Online Shoppers by Age Group, 2015 – 2017



Base: Internet users aged 7 and above who used the Internet in the last 3 months

40% of e-consumers in Singapore ordered goods or services from other Asian countries

In 2017, 40% of individuals who ordered goods or services over the internet chose sellers located in other Asian countries, against 36% from those located in the rest of the world. However, this was reversed in those aged 50 to 59 years, and 60 years and above where they preferred to buy from sellers from rest of the world. (Chart B7).



Apparel, travel products and tickets for entertainment events were the three most popular items purchased online in the last three years

The three most popular items bought online for private purposes in the past three months were clothing, footwear, sporting goods or accessories (65%) followed by travel products (37%) and tickets for entertainment events (31%) (Table B4). These three items were also ranked the top three for the last three years. IT and telecommunication services (excluding software) (9%) had emerged as a new popular item in 2017, when compared to 2016.

Table B4: Top Ten Goods or Services Purchased Online by Age Group, 2017

Items	7-14 years	15-24 years	25-34 years	35-49 years	50-59 years	60 years & above	15 years & above	All age groups
Clothing, footwear, sporting goods or accessories	66%	72%	71%	63%	51%	35%	65%	65%
Travel product(s) (e.g. air ticket, accommodation, vehicle hire)	12%	22%	39%	42%	41%	44%	37%	37%
Ticket(s) for entertainment event(s) (e.g. cinema, theatre, concert, sports game)	18%	26%	38%	32%	24%	18%	31%	31%
Food or groceries	12%	13%	28%	35%	33%	24%	28%	28%
Household or electronic items (e.g. air cleaner, vacuum cleaner, speakers)	12%	10%	21%	26%	27%	23%	21%	21%
Computer equipment or parts (including peripheral equipment, such as harddrive, mouse, screen/monitor)	8%	9%	14%	12%	14%	10%	12%	12%
Books, magazines, newspaper (in physical form)	8%	11%	11%	10%	7%	15%	10%	10%
Computer or video games (in digital form)	26%	19%	12%	5%	7%	2%	10%	10%
Books, magazines, newspaper (in digital form)	8%	7%	11%	10%	9%	5%	9%	9%
IT and telecommunication services (excluding software)	0%	6%	9%	9%	12%	5%	9%	9%

Base: Online shoppers aged 7 and above who had made at least one online purchase in the past 3 months

More than seven in ten online shoppers paid for online purchases using credit cards

Credit card payment remained as the most common mode of payment for goods or services purchased online, consistently over the last few years (Table B5).

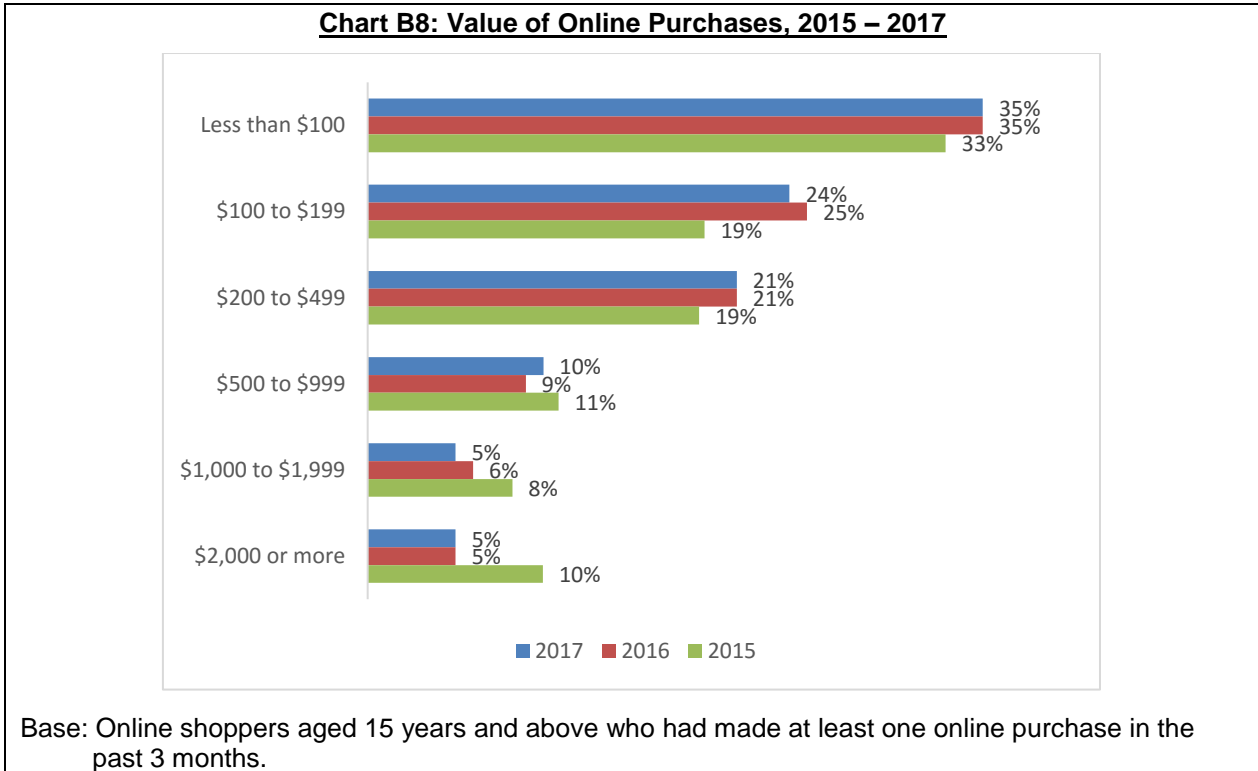
Table B5: Payment Methods for Goods or Services Purchased Online by Age Group, 2017

Payment Method	7-14 years	15-24 years	25-34 years	35-49 years	50-59 years	60 years & above	15 years & above	All age groups
Credit cards	51%	46%	74%	81%	80%	86%	72%	72%
Direct debit / Pay using bank account	16%	54%	40%	26%	24%	13%	35%	35%
Internet fund transfer	0%	17%	19%	24%	19%	20%	20%	20%
Cash on delivery	46%	31%	30%	19%	13%	13%	18%	18%
Mobile Wallet (e.g., PayPal, Starhub's SmartWallet, DBS' PayLah)	0%	8%	12%	12%	10%	12%	11%	11%
eNETS virtual account	0%	5%	8%	10%	8%	7%	8%	8%

Base: Online shoppers aged 7 and above who had made at least one online purchase in the past 3 months

Majority of online shoppers spent at least \$100 in the past three months on online purchases

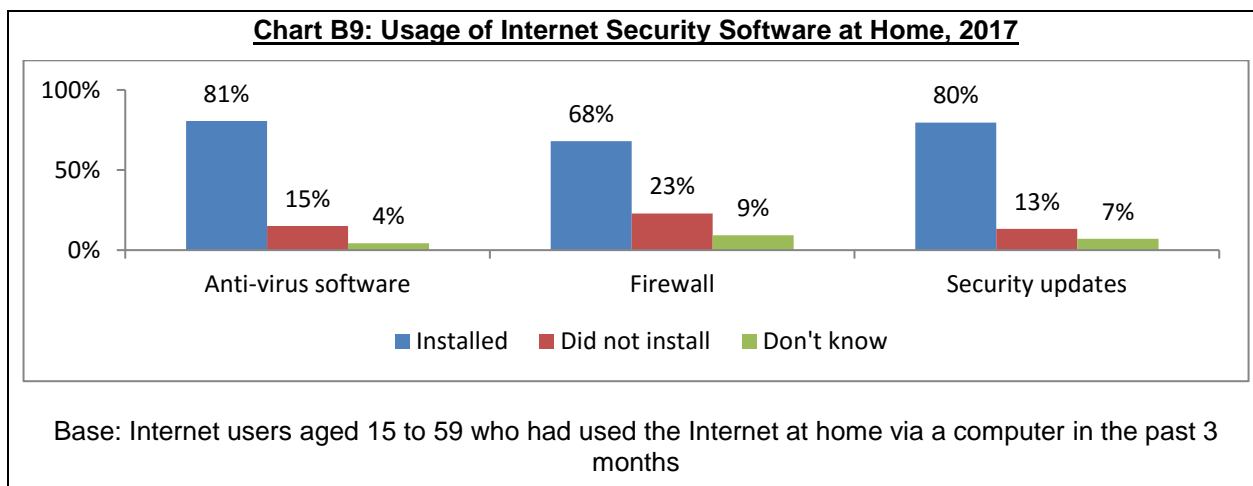
In 2017, about 7 in 10 online shoppers spent at least \$100 in the past three months on their online purchases (Chart B8).



Among Internet users who had never shopped online the most commonly cited reason for not doing so was consistently “*Prefer to shop in person or deal personally with a service provider*” followed by “*Not interested*” in 2015, 2016 and 2017.

Adoption rates of Internet security measures on home computer in year 2017 was similar to 2015 and 2016, with about 8 in 10 having installed anti-virus software and security updates on computer used to access the Internet at home

In 2017, anti-virus software and security updates were the top two Internet security measures adopted on computer used to access the Internet at home, by more than 80% of Internet users who connected to the Internet at home via a computer in the past three months (Chart B9).



'Don't think that the protection is necessary' was consistently the main reason for not using Internet security software over the last three years

Among users who accessed the Internet at home via a computer and did not install any one of the Internet security software (anti-virus, firewall, security updates), 50% cited that they did not think that there was a necessity to install anti-virus software, 45% cited the same for firewall, and 45% for security updates. About 22%-31% did not know that the protection was necessary (Table B6).

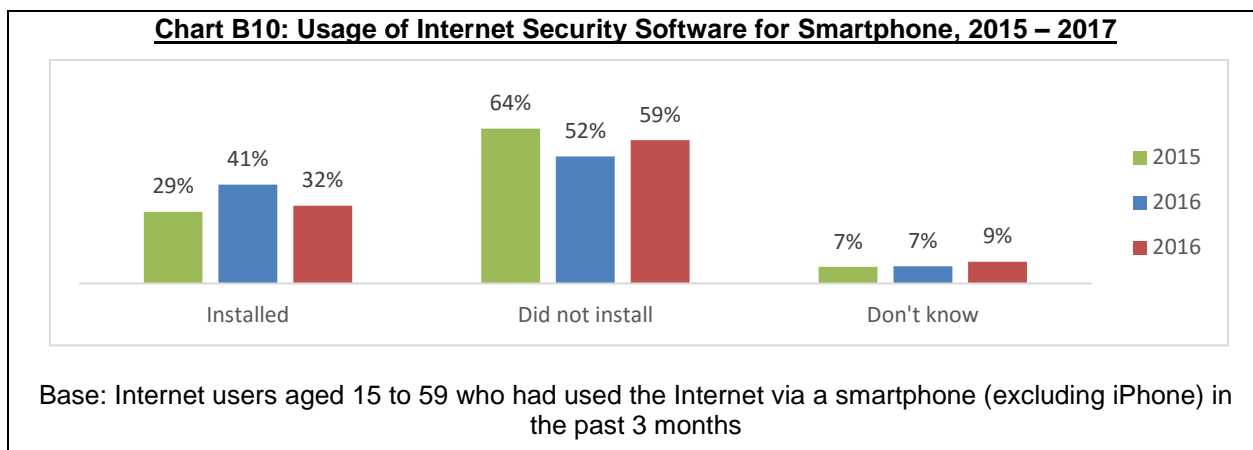
Table B6: Reasons for Not Using Internet Security at Home, 2017

No.	Reason for not using anti-virus, firewall or security updates at home	Anti-virus software	Firewall	Security updates
1	Don't think the protection is necessary	50%	45%	45%
2	Don't know that the protection is necessary	22%	31%	27%
3	Costly software or subscription	19%	10%	10%
4	Lack of knowledge, skills or confidence	10%	14%	18%

Base: Internet users aged 15 to 59 who had used the Internet at home via a computer (excluding iPad) in the past 3 months that was not protected by any one of the Internet security software (anti-virus, firewall, security updates).

About 3 in 10 installed anti-virus software for smartphones

About 32% of smartphone users who had connected to the Internet in the past three months had anti-virus software installed on smartphones in 2017, a 9 percentage-point decline from 2016. (Chart B10).



'Don't think that the protection is necessary' was still the leading reason for not using anti-virus software for smartphone in 2017, when compared to 2015 and 2016

Among users who accessed the Internet via a smartphone and did not install anti-virus software in 2017, 32% cited that they did not think that there was a necessity to install anti-virus software, with 20% and 25% did not know that protection was necessary, and available, respectively (Table B7).

Table B7: Reasons for Not Using Anti-virus Software for Smartphone, 2015 – 2017

No	Reason for not using anti-virus software for smartphone	2015	2016	2017
1	Don't think that protection is necessary (i.e., think that the phones will have a small chance of getting virus)	53%	43%	32%
2	Don't know that protection is necessary (i.e., don't know that phones can have viruses)	19%	15%	20%
3	Don't know that protection is available	16%	17%	25%
4	Cost of software/subscription is too high	6%	7%	7%
5	Lack of knowledge, skills or confidence	4%	7%	7%
6	Not enough space on mobile phone	1%	5%	4%

Base: Internet users aged 15 to 59 who had used the Internet via a smartphone (excluding iPhone) in the past 3 months that was not protected by anti-virus software.