

Annex A

ANNUAL SURVEY ON INFOCOMM USAGE IN HOUSEHOLDS AND BY INDIVIDUALS FOR 2005 EXECUTIVE SUMMARY

Introduction

The Annual Survey on Infocomm Usage in Households and by Individuals for 2005 is the tenth edition in an annual series that began in the 90's.

The survey aims to gauge the adoption and extent of usage of infocomm appliances/services in households and among individuals.

Comparisons with previous years' survey findings are provided where available and appropriate.

Research Methodology

The sample was selected from the Household Sampling Frame maintained by the Department of Statistics (DOS). Selection was done using a two-stage stratified design.

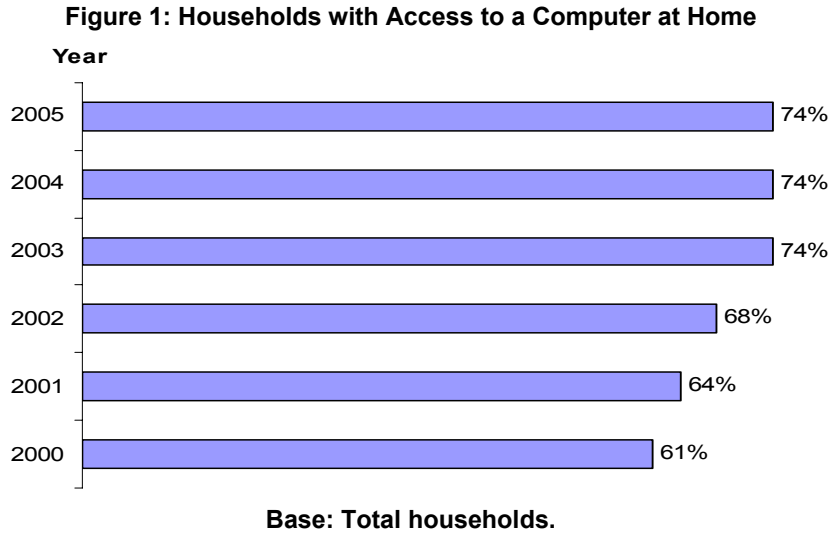
The survey comprised 2 sets of questionnaires:

- The household questionnaire which was answered by a family member aged 15 years and above who is in the position to answer the questions for the whole family. The household questionnaire was directed at all households, regardless of nationality.
- The individual questionnaire which was answered by one randomly selected family member aged 15 years and above. The individual questionnaire was directed only at the resident population.

Fieldwork for the survey was carried out from November 2005 and ended in the middle of January 2006. A total of 2,000 households and 2,000 individuals were interviewed.

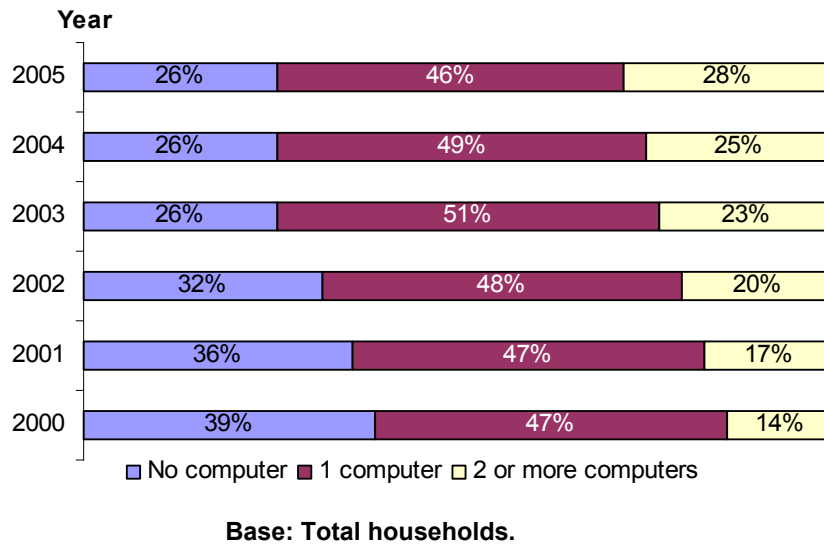
Access to a Computer at Home

The proportion of households with access to a computer at home was 74% (Figure 1). This proportion has remained unchanged since 2003.



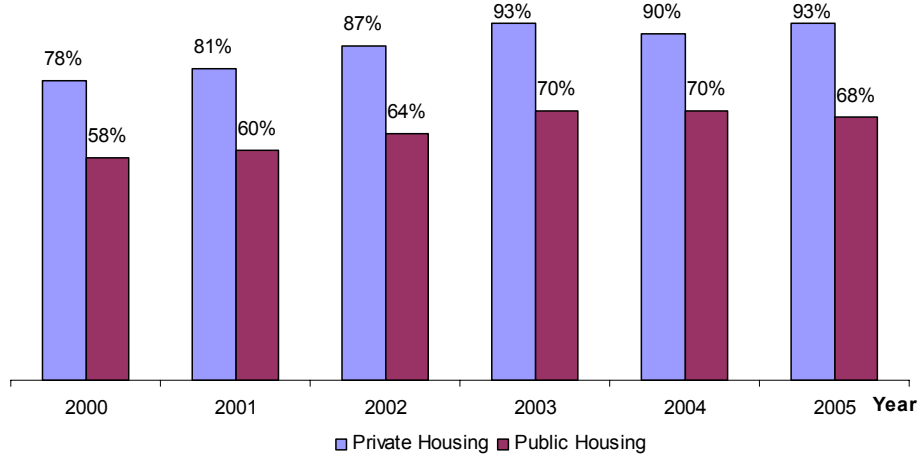
The proportion of households with two or more computers was 28% (Figure 2).

Figure 2: Number of Computers in Households



Nine in ten households in private housing had access to a computer at home; compared to seven in ten households in public housing (Figure 3).

Figure 3: Households with Access to a Computer at Home



Base: All households in private or public housing respectively.

“No necessity” (35%) and “Lack of skills” (32%) were the top two main reasons cited for not having access to a computer at home (Table 1).

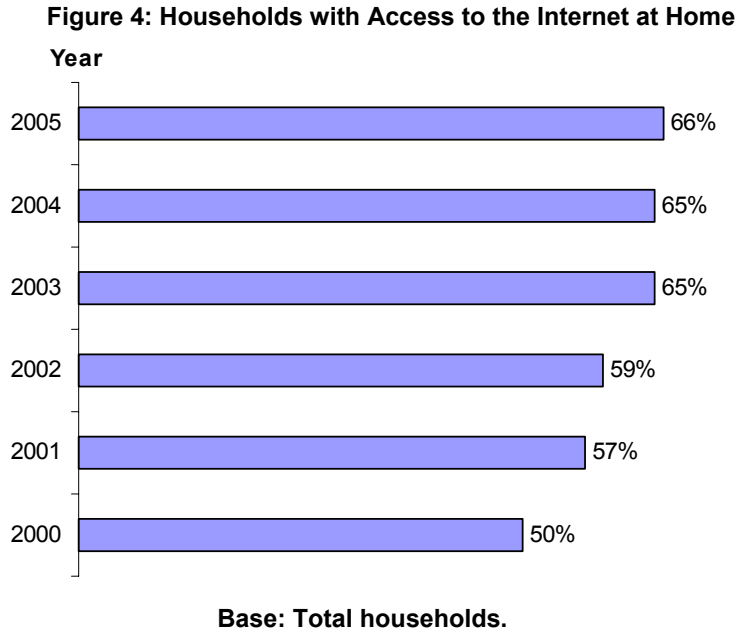
Table 1: Single Main Reason for Not Having Access to a Computer at Home

	2004	2005
No necessity	42%	35%
Lack of skills	19%	32%
PC costs are too high	16%	15%
Age is a barrier	9%	12%
Children too young	3%	6%
Have access elsewhere	9%	0%
Others	2%	0%
Total	100%	100%

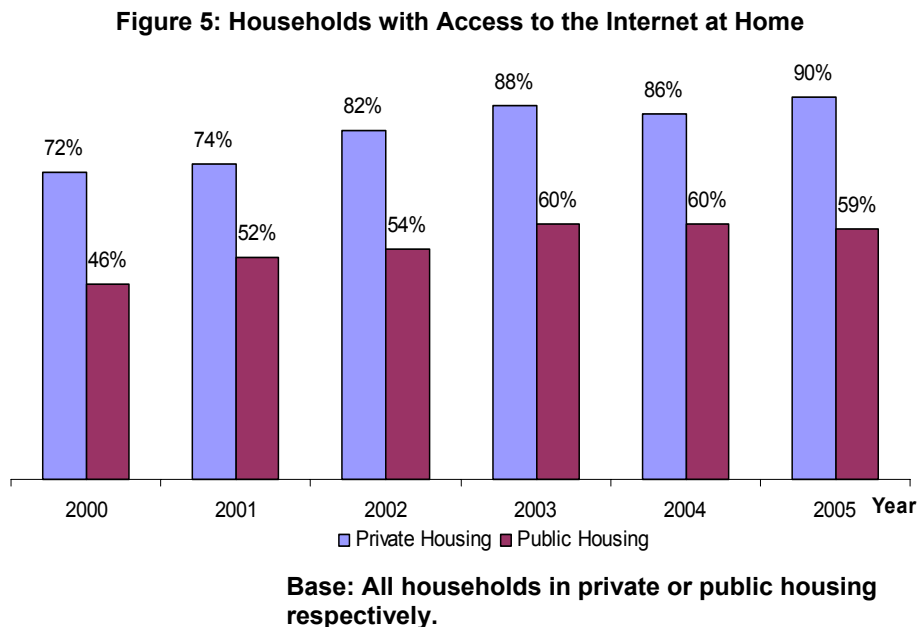
Base: Total households without access to a computer at home.

Internet Access at Home

The proportion of households with access to the Internet at home was 66% (Figure 4).



Nine in ten households in private housing had access to the Internet at home compared to about six in ten households for public housing (Figure 5).



“Access costs are too high” (29%) was the top main reason cited for not having Internet access at home (Table 2).

Table 2: Single Main Reason for Not Having Internet Access at home

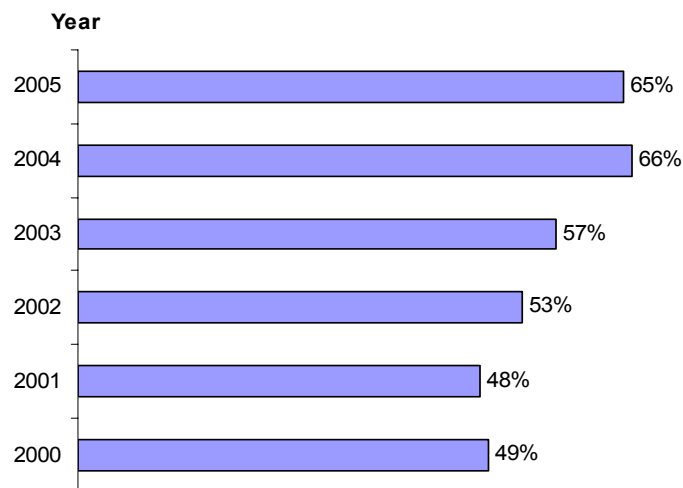
	2004	2005
Access costs are too high	18%	29%
Have access elsewhere	29%	17%
No necessity	24%	16%
Lack of interest	0%	11%
Concern about exposure to inappropriate/harmful content	3%	10%
Others	4%	9%
Lack of skills	11%	6%
Privacy concern	2%	1%
Security concern	0%	1%
Children are too young	6%	0%
No time	3%	0%
Total	100%	100%

Base: Total households with access to a computer at home but without Internet access.

Individual Usage of Infocomm Appliances/Services

About two-thirds of the Singapore’s resident population aged 15 years and above were computer users (Figure 6).

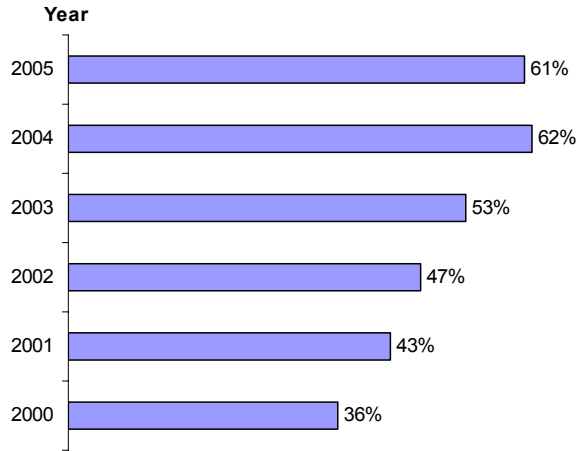
Figure 6: Computer Users



Base: Total resident population aged 15 years and above.

61% of Singapore's resident population aged 15 years and above were Internet users (Figure 7).

Figure 7: Internet Users



Base: Total resident population aged 15 years and above.

Infocomm Appliances/Services

Nearly all Internet users (96%) used the Internet in the last 12 months as a communication tool (Table 3).

Table 3: Usage of Internet Applications/Services in 2005

	Ever Used	Used in the last 12 months
For communicating:	96%	96%
Sending or receiving emails	94%	90%
Other communication tools (e.g. chat rooms/sites and instant messaging)	45%	43%
Blogging	18%	17%
Peer-to-peer	12%	11%
Telephoning over the Internet (VoIP)	9%	7%
For getting information:	89%	86%
General web browsing	74%	71%
Information on goods or services	59%	57%
Information from government organisations/public authorities (from web sites or via email)	54%	52%
Information related to health or health services	34%	32%
Information on job opportunities	33%	29%
For leisure activities:	63%	61%
Playing or downloading computer/video games	39%	37%
Downloading or uploading other media (e.g. digital photos)	38%	36%
Downloading or listening to online music	30%	28%
Reading or downloading electronic books, newspapers or magazines	28%	26%
Downloading or watching movies, short films or	24%	23%

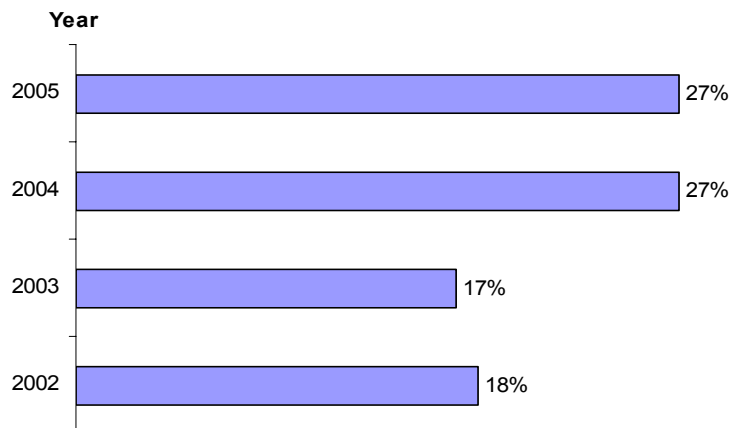
	Ever Used	Used in the last 12 months
images		
Listening to web radio or watching web television	15%	14%
For dealing with government organisations/public authorities:		
Completing or lodging forms online (e.g. income tax filling)	59%	57%
Downloading or requesting forms	47%	46%
Making online payments	44%	42%
	29%	28%
For transacting:	43%	43%
Internet banking	32%	29%
Applying for jobs	22%	19%
Selling goods or services (e.g. through auction sites)	10%	9%
For other activities:	35%	32%
Downloading software, patches or upgrades	24%	22%
Formal education or training activities (e.g. e-learning)	21%	19%
For remote access:	29%	28%
Access documents/ applications/ collaborative tools from office server outside office (for office work)	19%	18%
Access documents/ applications/ collaborative tools from school server outside school (for school work)	14%	12%
Home business	3%	2%

Base: Total Internet users aged 15 years and above.

Online Shopping

27% of Internet users ever made purchases online (Figure 8). Each online shopper spent an average amount of S\$1,068 on Internet purchases in the last 12 months. The most popular products/services bought online in the last 12 months (Table 4) were travel products; and clothing, footwear, sporting goods or accessories.

Figure 8: Online Shopping



Base: Total Internet users aged 15 years and above.

Table 4: Products/Services Bought Online

	Ever bought	Bought in the last 12 months
Travel products (air tickets, accommodation, vehicle hire)	30%	28%
Clothing, footwear, sporting goods or accessories	27%	26%
Tickets or booking for entertainment events (sports, theatre, concerts)	20%	19%
Computer equipment or parts (including peripheral equipment)	14%	12%
Entertainment (music, video)	13%	12%
Financial products (including shares and insurance)	10%	8%
Food, groceries, alcohol or tobacco	8%	6%
Information technology and telecommunications services (excluding software) e.g. subscription of ICT services such as Internet access, cable TV	7%	6%
Photographic, telecommunications or optical equipment	3%	3%

Base: Total Internet users aged 15 years and above who had ever purchased online.

“Lack of interest” (34%) and “Preference to shop personally” (32%) were the two main barriers to online shopping (Table 5).

Table 5: Single Main Reason for Not Buying Online

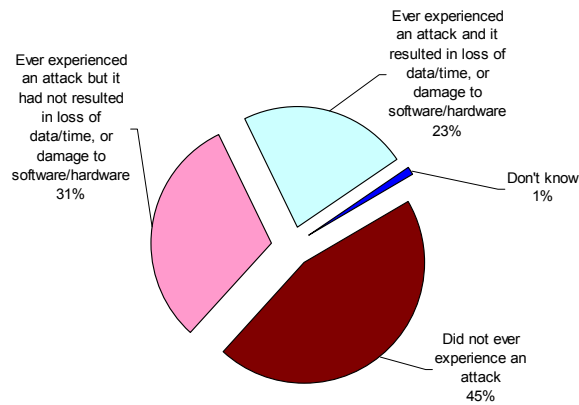
	2004	2005
Lack of interest	17%	34%
Preference to shop personally	40%	32%
Security concerns	25%	14%
Trust concerns e.g. worried about warranties, receiving goods or services and/or returning goods	0%	7%
Privacy concerns e.g. worried about giving personal details	0%	6%
Others	4%	5%
Lack of skills	2%	2%
No credit card	8%	0%
Lack of information provided to reach a purchase decision	4%	0%
Total	100%	100%

Base: Total Internet users aged 15 years and above who had never purchased online.

Home Internet Security

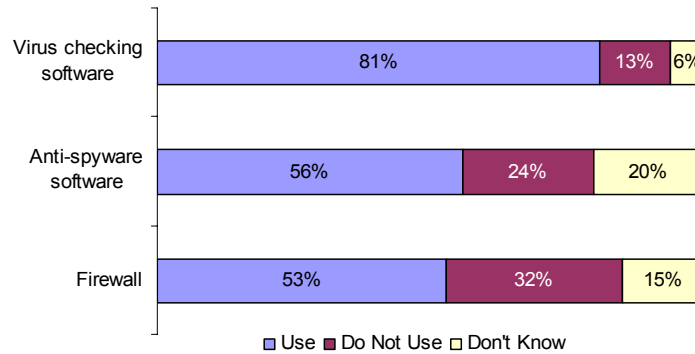
More than half (54%) of the home Internet users aged 15 and above ever experienced a virus attack (Figure 9). About eight in ten (81%) home Internet users aged 15 and above protect their computer with virus checking software (Figure 10). However, fewer Internet users installed anti-spyware software (56%) or firewall (53%).

Figure 9: Experiences with Virus Attack



Base: Total home Internet users aged 15 years and above.

Figure 10: Usage of Internet Security Software



Base: Total home Internet users aged 15 years and above.