ANNUAL INFOCOMM USAGE BY ENTERPRISES SURVEY, 2009
EXECUTIVE SUMMARY

Introduction

The 2009 Annual Survey on Infocomm Usage by Enterprises is the 11th in its series. It seeks to determine the level of infocomm adoption and usage by enterprises in Singapore.

Survey Methodology

The sample, covering all sectors, was selected from the Establishment Sampling Frame maintained by the Department of Statistics (DOS). The sample was stratified by the Singapore Standard Classification of Industrial Codes (SSIC). Data collection (via self-administered questionnaires by mail, email or Internet submission) and processing for the Survey was carried out from August to December 09.

Key Findings on Infocomm Usage by Enterprises, 2009

Usage of Computers

Computer usage amongst all enterprises increased slightly to reach 78% in 2009 (Chart 1). Computer usage by enterprises with 50 or more employees has reached saturation level.

Chart 1: Computer Usage by Employment Size
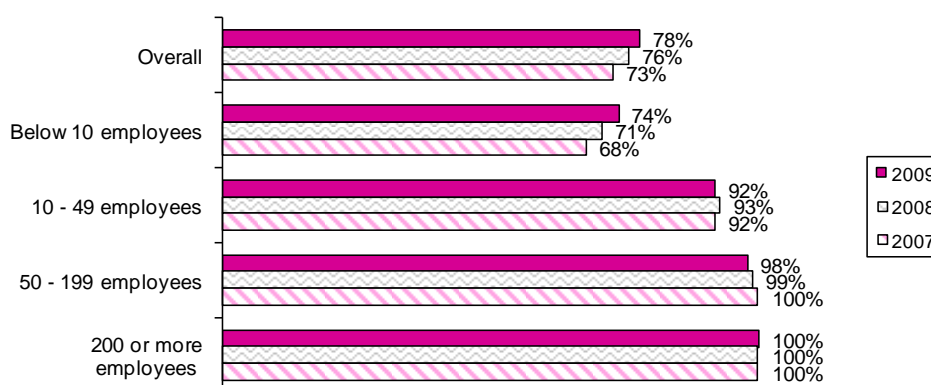
Base: All enterprises

Usage of Internet, Broadband and Web Presence

The proportion of enterprises using Internet and broadband reached 75% and 69% respectively (Charts 2 and 3). Overall, 37% of enterprises in Singapore had a web presence in 2009 (Chart 4).
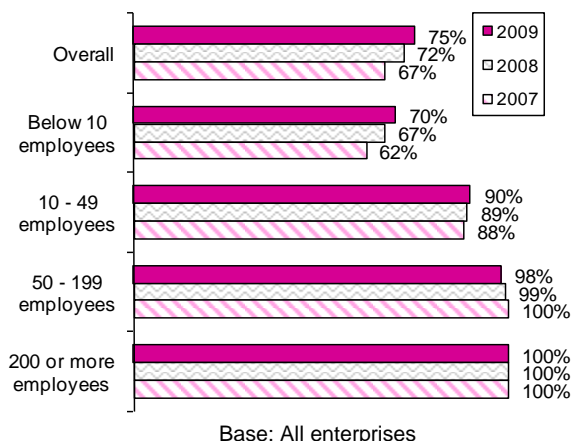
Chart 2: Internet Usage by Employment Size

Overall — 2009: 75%, 2008: 72%, 2007: 67%
Below 10 employees — 2009: 70%, 2008: 67%, 2007: 62%
10 - 49 employees — 2009: 90%, 2008: 89%, 2007: 88%
50 - 199 employees — 2009: 98%, 2008: 99%, 2007: 100%
200 or more employees — 2009: 100%, 2008: 100%, 2007: 100%

Base: All enterprises

Chart 3: Broadband Usage by Employment Size

Overall — 2009: 69%, 2008: 65%, 2007: 52%
Below 10 employees — 2009: 64%, 2008: 59%, 2007: 47%
10 - 49 employees — 2009: 85%, 2008: 83%, 2007: 71%
50 - 199 employees — 2009: 95%, 2008: 95%, 2007: 86%
200 or more employees — 2009: 100%, 2008: 100%, 2007: 99%

Base: All enterprises

Chart 4: Web Presence by Employment Size

Overall — 2009: 37%, 2008: 36%, 2007: 33%
Below 10 employees — 2009: 31%, 2008: 29%, 2007: 27%
10 - 49 employees — 2009: 57%, 2008: 58%, 2007: 58%
50 - 199 employees — 2009: 65%, 2008: 78%, 2007: 73%
200 or more employees — 2009: 93%, 2008: 90%, 2007: 86%

Base: All enterprises
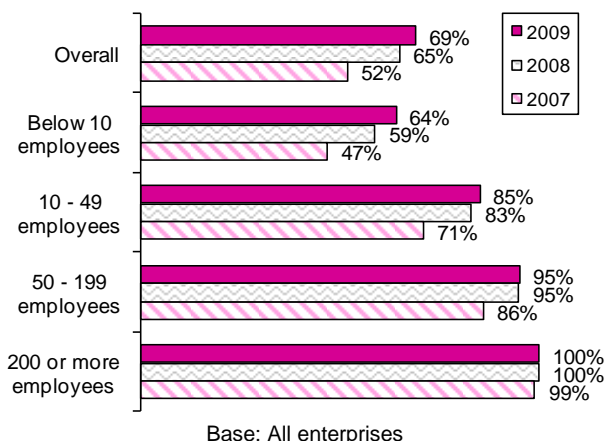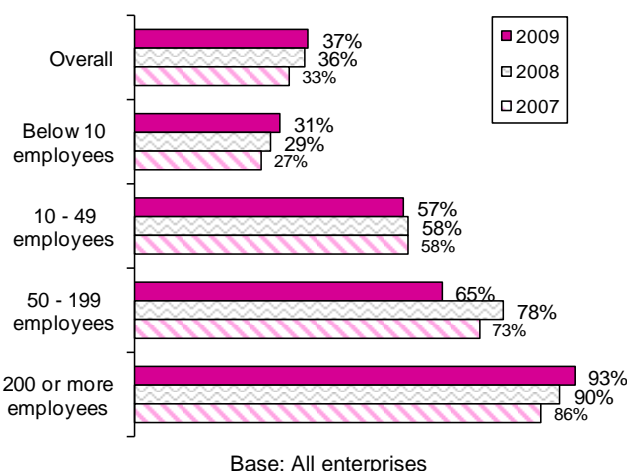
Internet Applications/Services

The top Internet applications/services used by enterprises continue to be S*ending or receiving mails* and *Information search*, followed by activities involved in obtaining information from government organisations (Table 1).

Table 1: Top 10 Uses of Internet

	Internet Applications / Services	Proportion of Enterprises		
		2007	2008	2009
1	For sending or receiving mails	96%	96%	96%
2	For information search	92%	92%	92%
3	For obtaining information from government organisations (e.g. from web sites or via e-mail)	77%	84%	77%
4	For downloading or requesting government forms	74%	81%	74%
5	For completing government forms online or sending completed government forms	69%	78%	71%
6	For banking and financial services	48%	56%	56%
7	For making online payments to government organisations	48%	58%	54%
8	For market monitoring purposes (e.g. prices)	33%	39%	41%
9	For placing orders for goods/services	37%	40%	41%
10	For receiving orders for goods/services	37%	37%	40%

Base: Enterprises with Internet usage

Infocomm Security Measures Adoption

Virus checking or Protection software remained the most pervasive infocomm security measure among enterprises (Chart 5).

Chart 5: Adoption of Infocomm Security Measures
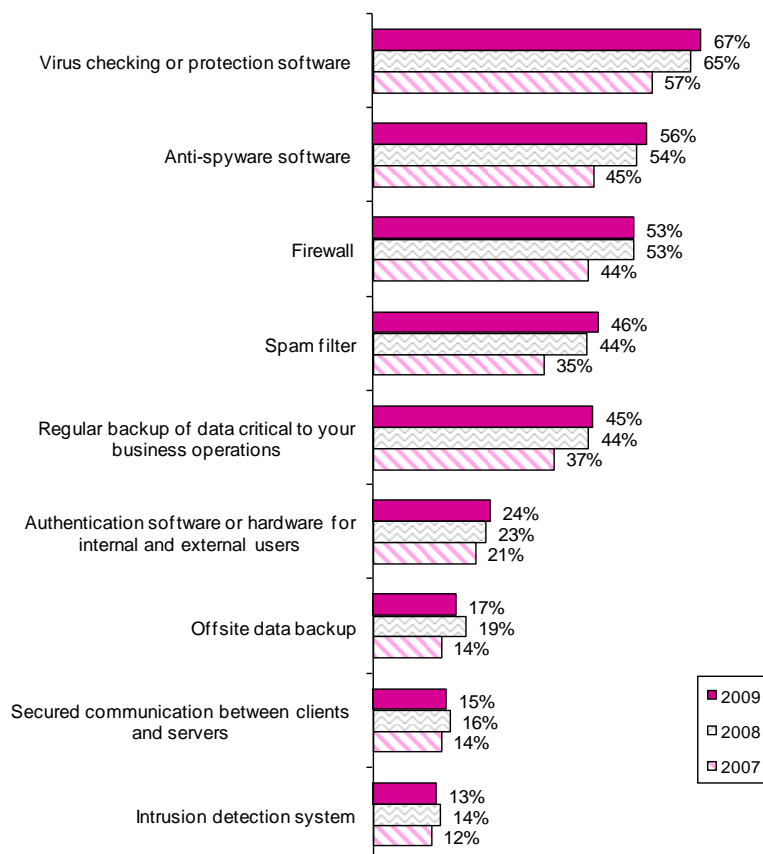
Base: All enterprises

Barriers to Usage of Infocomm in General and Internet

Tables 2 and 3 list the top five barriers to the usage of infocomm in general and Internet, as cited by enterprises with no computer and Internet usage respectively.

Table 2: Top Five Barriers to Infocomm Usage in General[1]

Barrier to Infocomm Usage	2007 Ranking	2008 Ranking	2009 Ranking
Lack of perceived benefits	5	1	1
The level of infocomm skills is too low among the employed personnel	2	3	2
Cost of infocomm expenditure is too high	1	4	3
Supply of infocomm technology does not match the infocomm needs of the organisation	6	2	4
New versions of existing software are introduced too often	3	6	5

Base: Enterprises with no computer usage

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[1] In general, infocomm usage starts with computer usage.
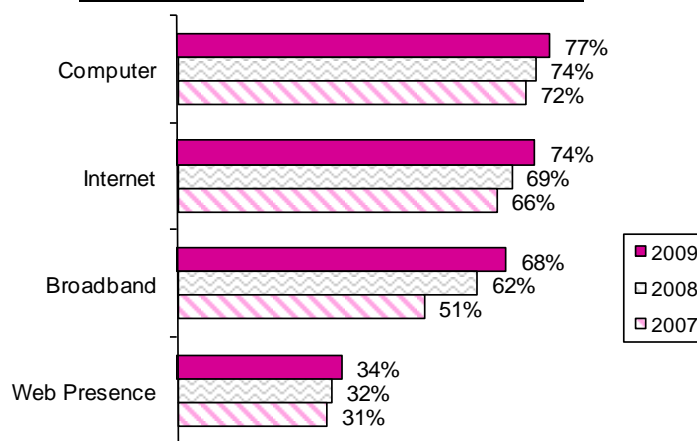
Table 3: Top Five Barriers to Internet Usage

Barrier to Internet Usage	2007 Ranking	2008 Ranking	2009 Ranking
Lack of perceived benefits	5	1	1
Technology is too complicated	1	2	2
Cost of Internet connectivity is too high	3	3	3
Security concerns (e.g. hacking and viruses)	2	4	4
Possible losses in productivity due to non-work related use of the Internet	6	7	5

Base: Enterprises with no Internet usage

Infocomm Usage by Small and Medium Sized Enterprises (SMEs[2])

Chart 6 shows a rise in infocomm usage among SMEs in 2009 with the highest increase in broadband usage.

Chart 6: Infocomm Usage among SMEs

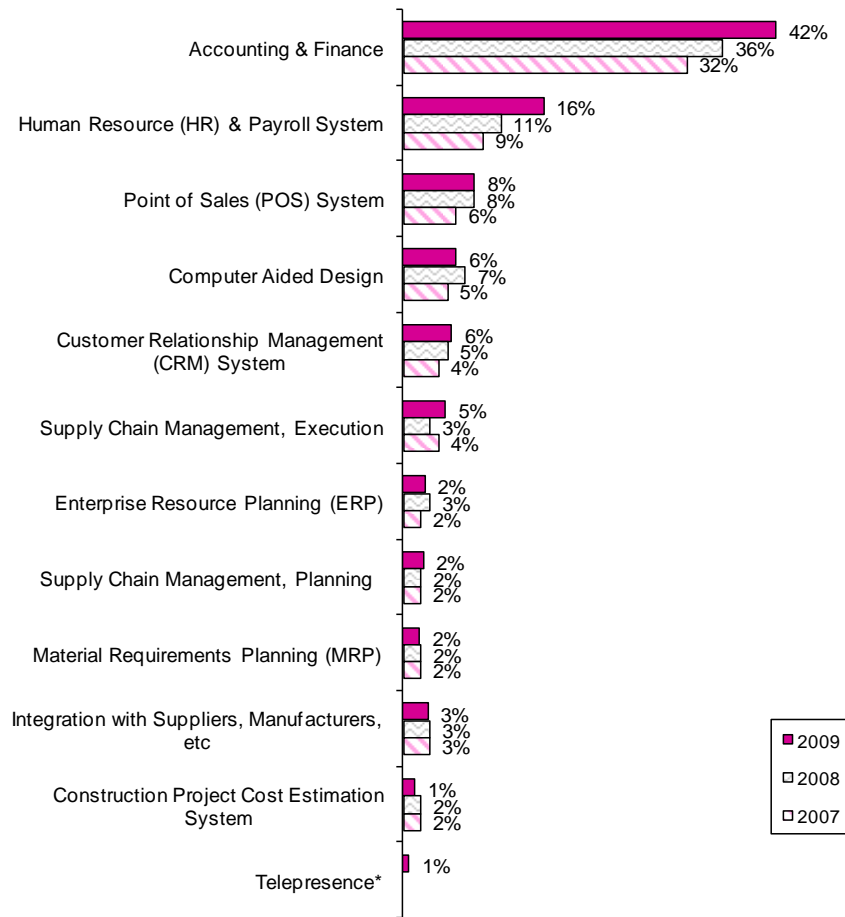| Category	2009	2008	2007
Computer	77%	74%	72%
Internet	74%	69%	66%
Broadband	68%	62%	51%
Web Presence	34%	32%	31%

Base: All SMEs

Accounting & Finance; Human Resource (HR) & Payroll and *Point of Sales (POS)* were the most commonly used infocomm services by SMEs (Chart 7).

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[2] The definition of local SME is as follows:
- At least 30% local equity
- Less than $15m fixed assets investment
- Less than 200 employees (for the non-manufacturing sectors)

Chart 7: Infocomm Services Used by SMEs

Service	2009	2008	2007
Accounting & Finance	42%	36%	32%
Human Resource (HR) & Payroll System	16%	11%	9%
Point of Sales (POS) System	8%	8%	6%
Computer Aided Design	6%	7%	5%
Customer Relationship Management (CRM) System	6%	5%	4%
Supply Chain Management, Execution	5%	3%	4%
Enterprise Resource Planning (ERP)	2%	3%	2%
Supply Chain Management, Planning	2%	2%	2%
Material Requirements Planning (MRP)	2%	2%	2%
Integration with Suppliers, Manufacturers, etc	3%	3%	3%
Construction Project Cost Estimation System	1%	2%	2%
Telepresence*	1%		

*Note: Data on telepresence is not available prior to 2009.

Base: All SMEs