

# You Know Anot?

- A monthly update on Singaporean attitudes •

## Smartphones in Singapore: A Whitepaper Release

A Whitepaper published by **Blackbox Research Pte Ltd**

The logo for Blackbox Research, consisting of the words "BLACK" and "BOX" stacked vertically in a white, sans-serif font on a black square background.

**add** 82 Telok Ayer Street  
#02-01/02/05/06  
Far East Square  
Singapore 048467

**tel** +65 6323 1351

**fax** +65 6323 1321

**e** [social@blackbox.com.sg](mailto:social@blackbox.com.sg)

**w** [www.blackbox.com.sg](http://www.blackbox.com.sg)

**tw** [@BlackboxR](https://twitter.com/BlackboxR)

**fb** [www.facebook.com/blackboxresearch](https://www.facebook.com/blackboxresearch)

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### About the You Know Anot monthly sentiment meter

Every month, Blackbox interviews more than 700 Singaporeans over the age of 18. The survey is conducted online. Results are weighted to reflect current national demographics (Citizens/PRs only).

### About the Company

Blackbox is a leading independent research company based in Singapore. The company conducts both consumer and stakeholder research and specialises in looking at community issues and trends.

# Smartphones in Singapore

## Executive Summary

The rise of smartphones in the last 4 years has been swift and closely watched; not only by telecom companies, but also consumer brands who are interested in knowing where their customers are. Technology and innovation surrounding the smartphone ecosystem have proliferated to create an incredibly sophisticated 3G mobile landscape.

Singapore is uniquely poised within this vibrant scene. With a mobile penetration rate at a massive 148.9% of which three-quarters are 3G subscriptions<sup>1</sup>, it is no wonder our population has earned a reputation for being one of the most mobile-savvy in the South-east Asia region.

As the world stands on the brink of high-speed 4G data, what does smartphone use look like amongst Singaporeans? And what do Singaporeans expect of their 3G network services? We spoke to 500 Singaporeans in a nationally representative study to find out what Singapore smartphone users think.

Our topline findings include:

- **Smartphone penetration amongst Singaporeans now stands at 88%**  
Distribution amongst age groups is relatively consistent even amongst older netizens
- **The iPhone is a Singapore market giant at 73% share.**
- **Amongst smartphone users, SingTel maintains dominance, followed by StarHub and M1 respectively.**  
For smartphone service features, M1 is a big winner for customer service, while StarHub suffers poorer ratings across the board.
- **Time allocated to Wi-Fi versus 3G is nearly split right down the middle with Wi-Fi taking 45% and 3G taking 55% of usage time.**

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### References

<sup>1</sup>IDA Statistics Release for Jan-Jun 2012.

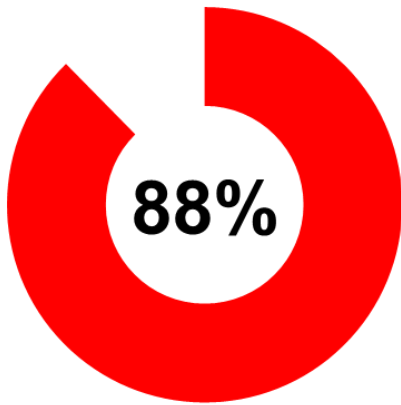
<http://www.ida.gov.sg/Publications/20120402113400.aspx> [Accessed April 2012]

<sup>2</sup>SingTel Annual Report.

<http://info.singtel.com/about-us/investor-relations/annual-reports> [Accessed April 2012]

### Fieldwork notes:

Fieldwork was carried out online amongst 500 Singaporeans over the age of 18 during February 2012 in our monthly sentiment meter omnibus survey. Data is weighted for representativeness.



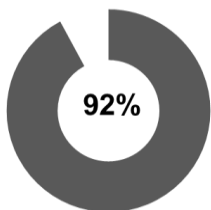
Of Singaporeans own smartphones

### Singaporean smartphone ownership

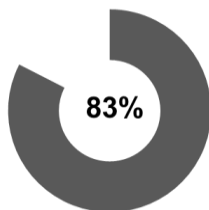
Smartphone adoption is increasing at breakneck speed – SingTel has reported in its 2011 Annual Report<sup>2</sup> that 60% of new phones sold by them are smartphones.

Reflecting this trend, **the majority or 88% of Singaporeans in our study owned smartphones.**

25-39 year olds

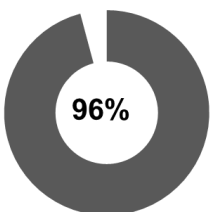


55 and above

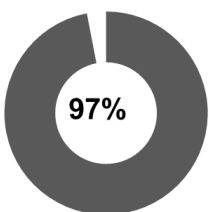


It was interesting to note that while those aged 25-39 years had the highest levels of smartphone ownership at 92%, ownership levels were relatively consistent across age brackets. Those aged 55 and above were not far behind at 83% smartphone ownership.

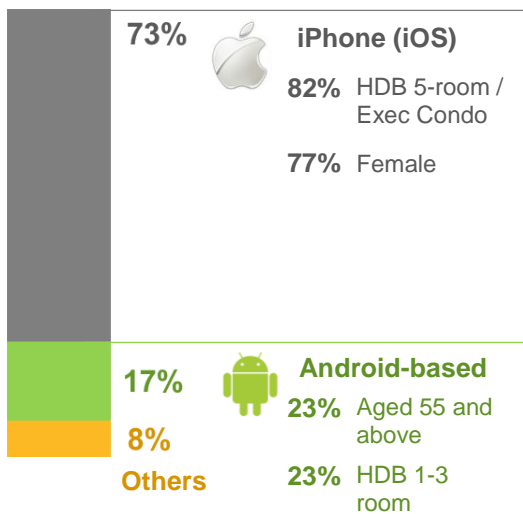
\$8-\$12k Monthly Household Income



Senior Management



Smartphone ownership spiked when it came to the affluent, and those in high-level corporate positions.



### Smartphone types

Amongst Singaporean smartphone owners, **the iPhone is a market giant at 73% share\***. The iPhone is more likely to be used by affluent heartlanders living in HDB 5 room flats and Executive Condominiums, as well as females.

Despite Samsung's recent rise to become the world's number 1 handset maker, Android handsets still lag amongst Singapore users. It was more likely to be used by older heartland Singaporeans. Other types of smartphones (Blackberry, Symbian, Windows Mobile) only captured 8% of the market.

\*A fourth category, "Don't Know", was not included for analysis.

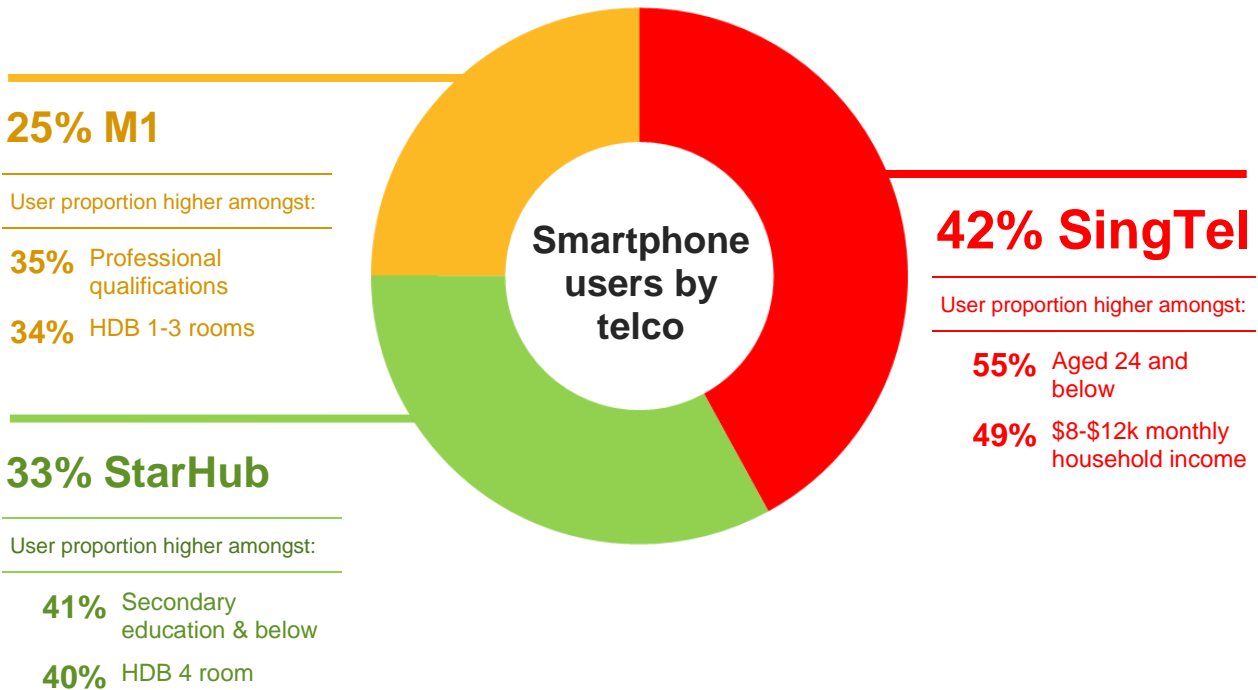
## Telco Smartphone Subscription

Singapore's telco wars are hotter than ever. Our 3 local providers fight tooth and nail over the lucrative smartphone market, with 3G now taking up 75% of all mobile subscriptions.

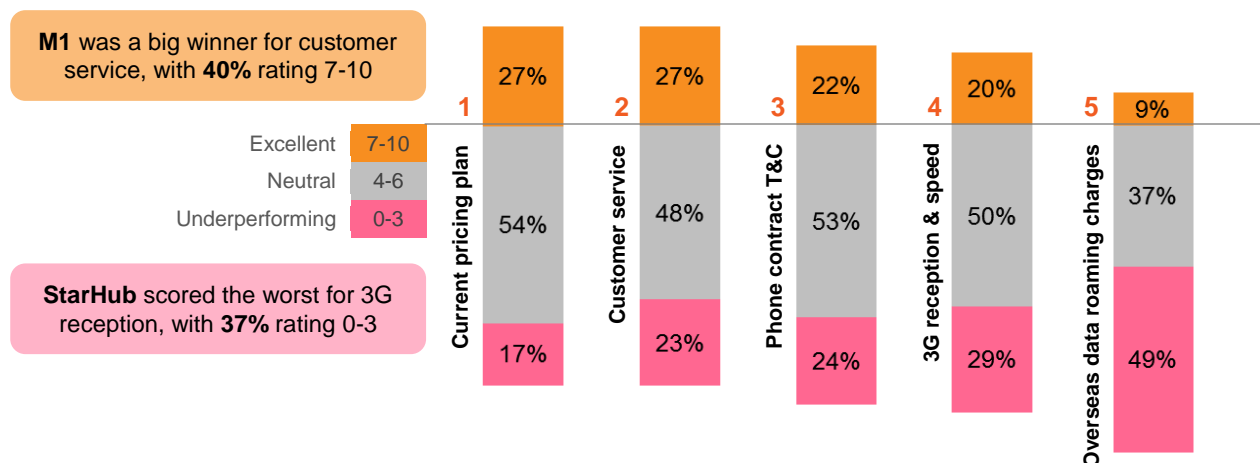
Maintaining the lead is SingTel at 42%, with StarHub (33%) and M1 (25%) following respectively.

Looking at those who are more likely to be using each provider, it's clear that SingTel successfully captures the youth and higher affluent market.

While SingTel remains the dominant player amongst all demographics, M1 and StarHub show some success amongst heartland Singaporeans.



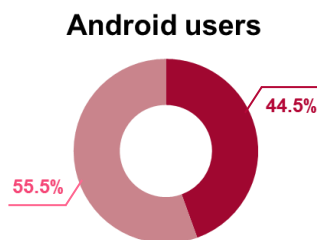
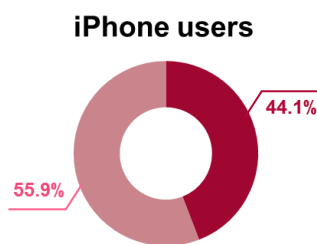
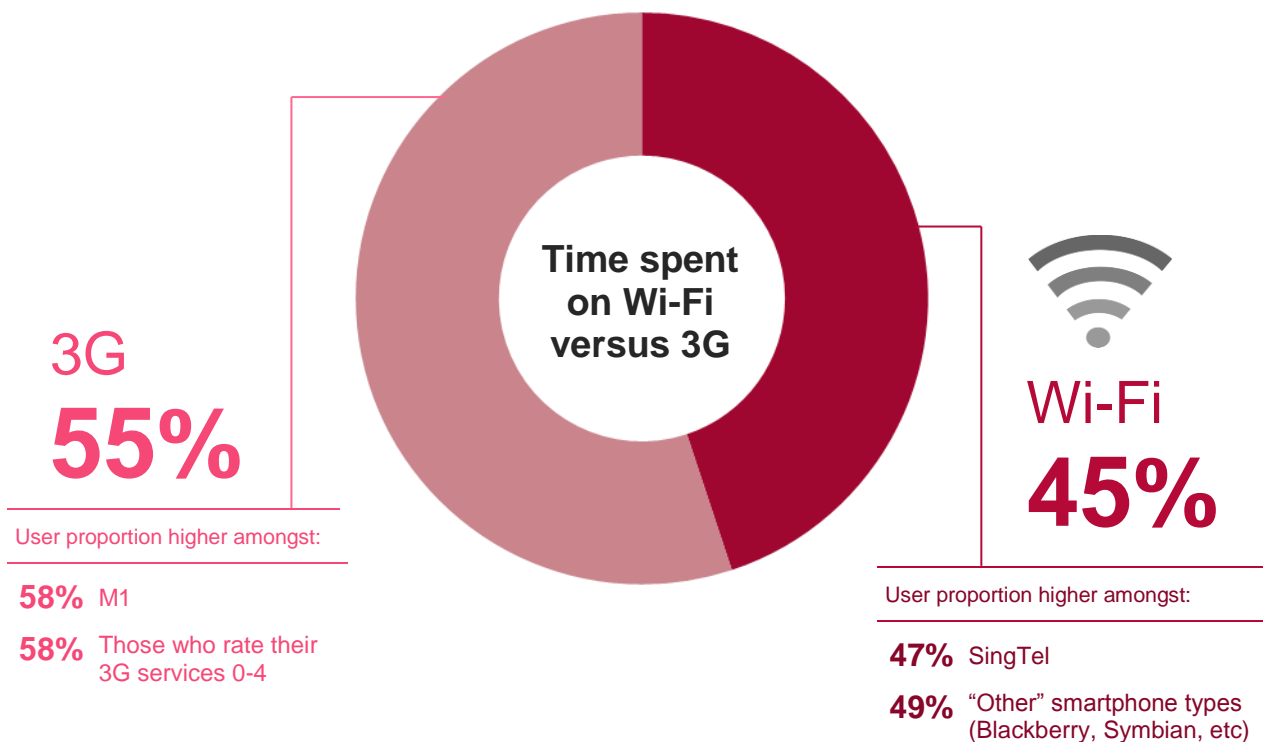
When asked to rate 5 features of telco services, smartphone users were most unhappy with the cost of overseas roaming data. **M1** often garnered the highest ratings despite its Nov 2011 fine from IDA, while **StarHub** consistently saw the greatest unhappiness for all 5 criteria, indicating some lingering impact from the 2011 nation-wide service breakdowns.



## Wi-Fi versus 3G

To access the mobile internet, smartphone users usually have a choice between connecting to their telco's 3G network or setting their smartphone to using a wireless network access point, or Wi-Fi.

We asked users to allocate how much time they used Wi-Fi versus 3G networks, and the results were nearly split right down the middle.



It's no surprise that Wi-Fi usage is so popular. Both iPhone and Android users are widely encouraged to use Wi-Fi over 3G networks for longer battery life and faster connection speeds, and here it has clearly impacted user behavior.

Those who spent longer on 3G networks were more likely to rate their 3G connections as less than satisfactory.

Overall, current 3G networks evidently leave something to be desired. The market is ripe for the introduction of 4G Long Term Evolution technologies at an affordable price point.

If you would like to know more about the study and its findings, please contact Joy at [social@blackbox.com.sg](mailto:social@blackbox.com.sg).