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INTERNET USERS SURVEY

2012

Suruhanjaya Komunikasi dan Multimedia Malaysia

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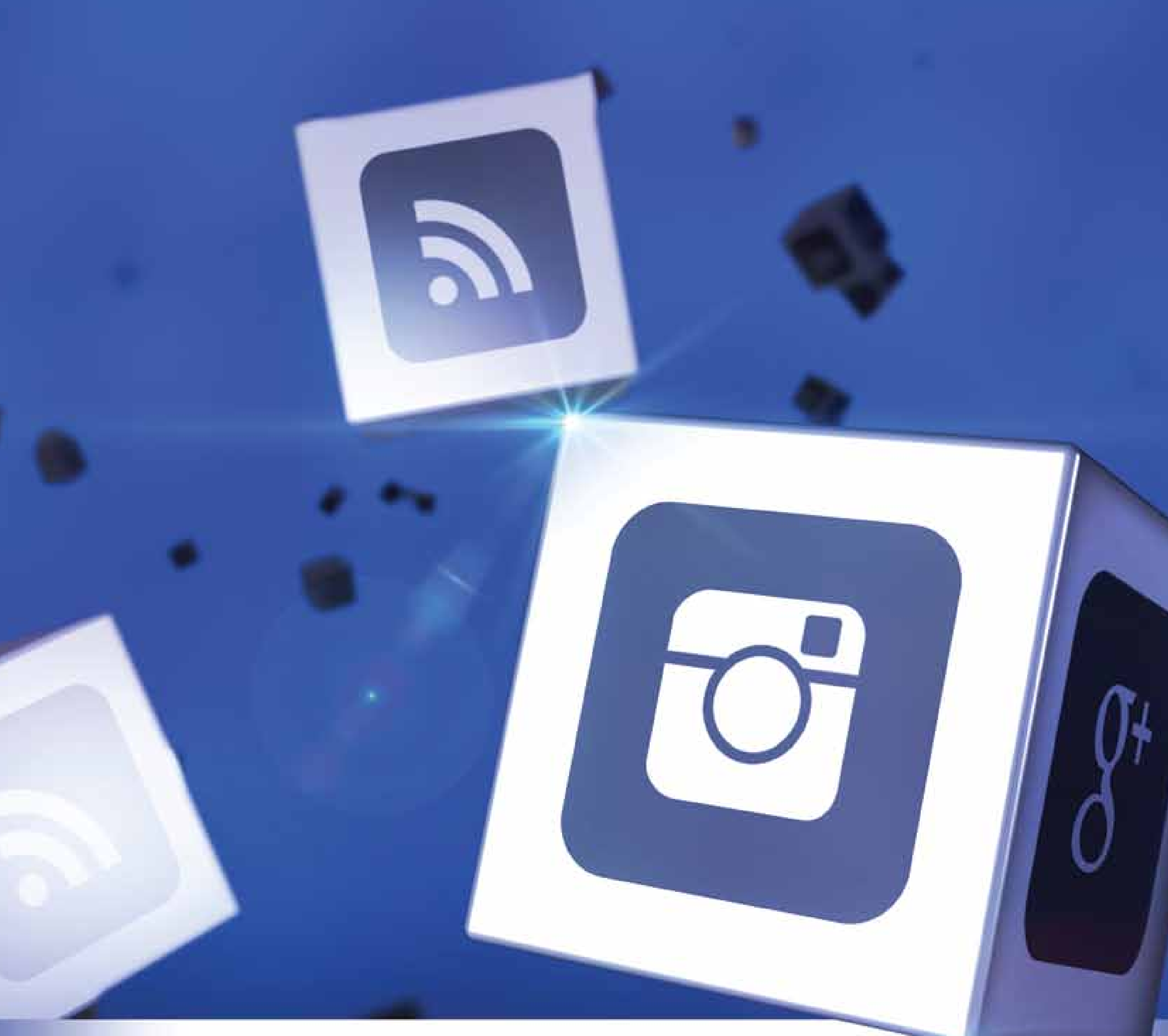


INTRODUCTION

INTRODUCTION

The MCMC Internet Users Survey (IUS) replaces the MCMC Household Use of the Internet Survey (HUIS) from 2012. The new series focuses on the use of the Internet irrespective of place of use. In this manner, its coverage of users is wider than the HUIS that concentrated purely on use within households.

METHODOLOGY

The IUS 2012 is based on a sample of individuals. The individuals that made up the sample were not drawn from a frame of individuals. They were the main users of hand phones that had MSISDNs that were identical to randomly generated numbers. The mobile cellular penetration rate of Malaysia as at 29th February 2012 is 128.7%, a high enough penetration for the subscriber base to be treated as a virtual frame of individuals.

Respondents were interviewed on their personal use (or non-use) of the Internet, after which they were interviewed about their households. In forming the sample, care was taken to ensure that each service provider had the same proportion of subscribers in the sample as they had on the ground.

This methodology is different from the methodology used in the Household Use of the Internet Survey series which ended with the 2011 survey. In that series of surveys, the sample was formed from household customer bases of ISPs in like proportions. The survey then contacted households by telephone to collect data on the household and then asked to talk to an Internet user, the selection of whom is randomised by asking to speak to the user with the next birthday. Individuals identified in this manner were interviewed pertaining to their use of the Internet.

One clear advantage of the new methodology employed in the present survey is that it reaches users who are dependent on public Wi-Fi, including hotspots and community access centres, or access provided at the workplace. It is because of this methodological change that we can estimate that as at 2Q 2012 the number of Internet users in Malaysia, regardless of place of access is 18.6 million. The earlier series limits Internet users to a home based subscription and we could not estimate the total number of all Internet users.

Two types of data were collected, a core set and a trends set. The core set consists of key questions canvassed in this edition and which will be repeated in all future editions of the survey to provide a time series that will grow as future surveys are undertaken to allow meaningful tracking. For instance, household Internet users that fell into the various categorisation schemes of the key variables are presented and proper use of these estimated proportions in conjunction with population estimates at like reference date will facilitate the derivation of various Internet penetration rates.

The core data were demographic and socio-economic in nature and included:

a. nationality
b. ethnicity
c. usual state of residence
d. gender
e. age
f. educational attainment
g. income category
h. urban / rural distribution

The set of questions touching on trends probed current trends in usage and these are expected to change from one edition to another.

Trends studied in IUS 2012 were:

a. multiple subscription
b. access technology
c. brand loyalty
d. places of access
e. access device
f. social networking

REFERENCE DATE

The reference date of the survey was set at 29th February 2012. To qualify for inclusion into the sample, a potential respondent must be able to answer "yes" to a screening question on whether he was a user at reference date.

TARGET AND SAMPLED POPULATION

The target population is all inhabitants and their households in the states and territories making up Malaysia. The sampled population is all inhabitants reachable by hand phones and their households in the states and territories making up Malaysia.

As at reference date, there were 128.7 hand phone subscriptions per 100 inhabitants.

There was only one stage of sample selection as the survey adopted a simple random sample (SRS) approach. Meaningful stratification was not possible because a suitable variable for stratification was not available.

DATA COLLECTION

The survey was conducted by trained interviewers operating out of MCMC CATI Centre located at Wisma Pahlawan, Kuala Lumpur.

In both user and non-user instances, pains were taken to explain to respondents the purposes and objectives of the survey. Fieldwork started on 9th June 2012 and ended on 13th July 2012.

MAIN FINDINGS

DEMOGRAPHICS AND SOCIOECONOMICS

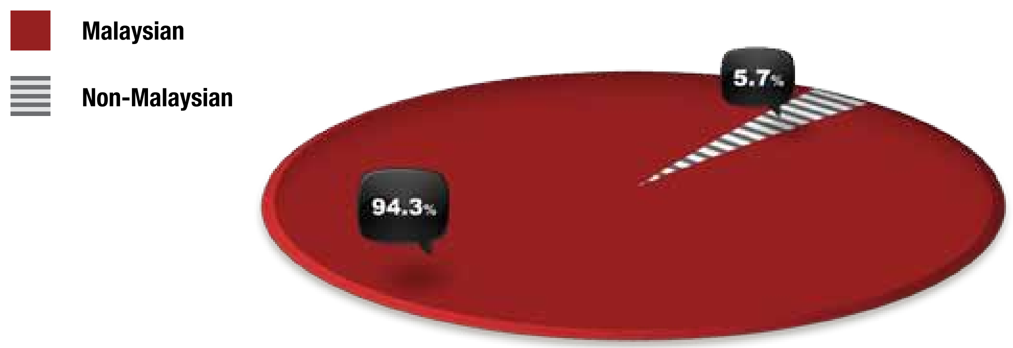
INTERNET USERS AND NON-USERS

As of 2Q 2012, the number of Internet users in Malaysia, regardless of locations of access is 18.6 million (or 63.6% of all inhabitants in Malaysia). Locations of access include homes, places of work, places of education, and Internet access points (commercial and complimentary) as well as while "on-the-move". It could very well be that a user could come from a home where there is no Internet access.

Reasons cited by respondents who do not use the Internet include lack of skills (50.5%), lack of interest (27.9%), cost too high (13.3%), no device (11.3%), language barrier (4.3%), lack of perceived benefits (2.1%), disability (1.6%), fear of technology (0.7%)

NATIONALITY

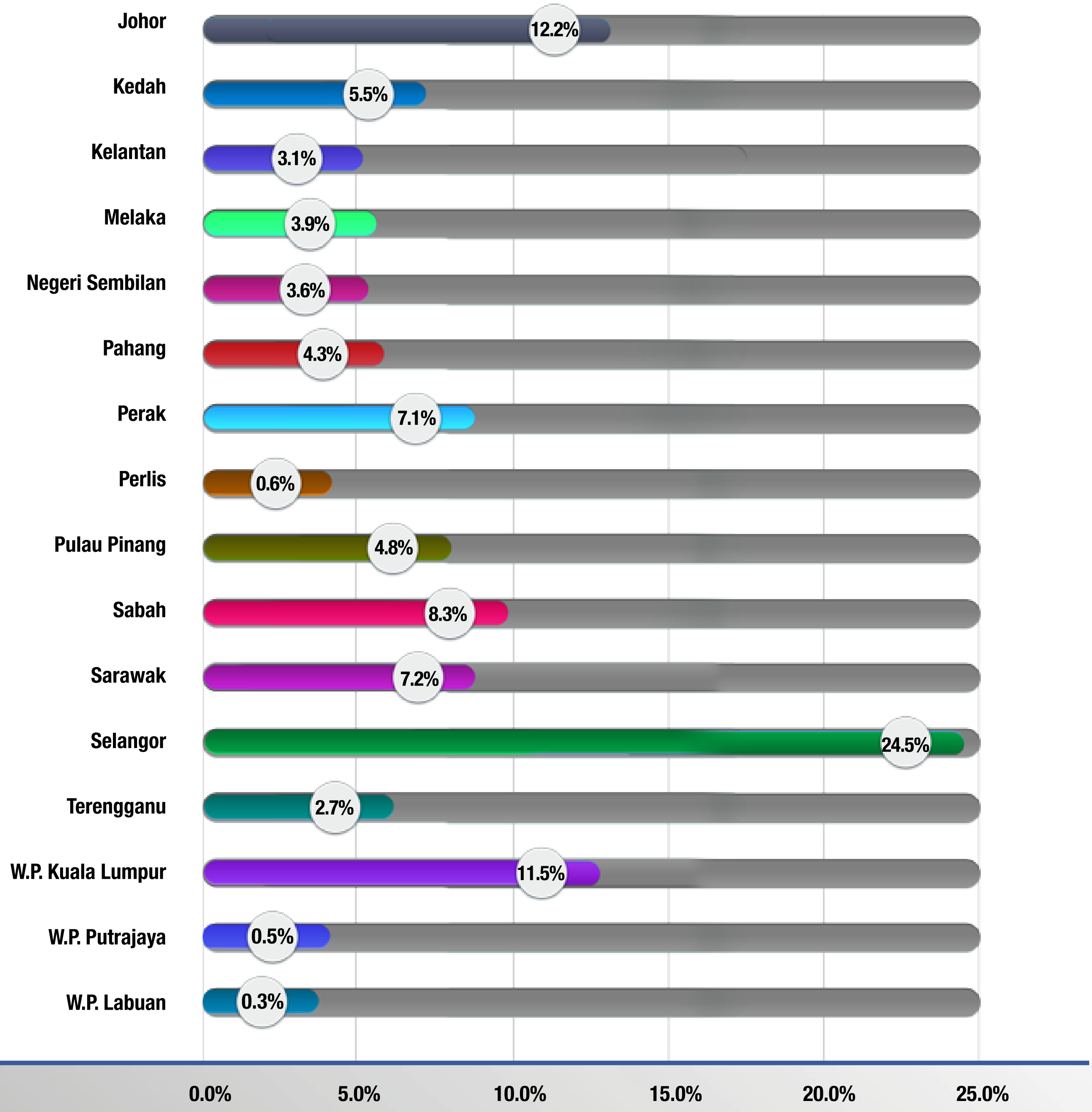
The survey found that 94.3% of Internet users are Malaysian while 5.7% are of other nationalities.



This contrasts with users of hand phones, surveyed in 2012, where other nationalities accounted for as high as 13.7% of those interviewed.

USUAL STATE OF RESIDENCE

Close to a quarter of Internet users reside in Selangor. This puts the state in pole position with 24.5% of all Internet users. Johor is a distant second with 12.2% of users followed closely by W.P. Kuala Lumpur which 11.5% of Internet users call home.



States with percentage shares between 10 and 5% includes Sabah, Sarawak, Perak and Kedah in descending order. All other states and territories have shares below 5%.

It should be noted that the preceding refers to percentage share of the Internet user base by state and not the penetration rate of the state. The two can be very different. Thus even if all of Putrajaya's population (79,400 at Q2, 2012) are Internet users they will only account for a small percentage of the 18.6 million strong Internet user base while its penetration would be 100%.

The Internet penetration rate by state is reported on a quarterly basis in Communications & Multimedia Pocket Book of Statistics and reproduced below is an excerpt from the first quarter of 2012.

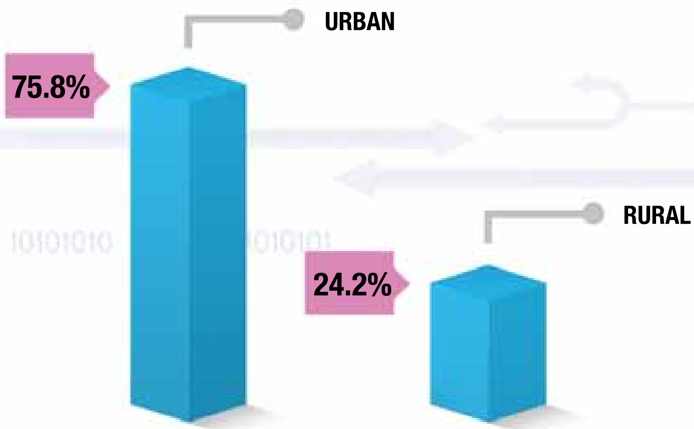
USUAL STATE OF RESIDENCE	2012 QTR 1
Johor	61.4
Kedah	56.9
Kelantan	44.7
Melaka	67.2
Negeri Sembilan	75.6
Pahang	49.4
Perak	52.8
Perlis	83.7
Pulau Pinang	83.4
Sabah	32.9
Sarawak	47.5
Selangor	75.5
Terengganu	58.8
W.P. Kuala Lumpur	112.1
W.P. Labuan	71.1
Malaysia	62.9

A penetration rate of over 100% can occur because of multiple subscriptions.

Putrajaya is included in Selangor.

INTERNET USERS IN THE RURAL AREAS

The ratio of Internet users in the rural areas of the country to Internet users in the urban areas of the country is roughly 1:3. The ratio of rural population to urban population is 1:2.4 in the 2010 Population and Housing Census.



By way of definition, urban areas are gazetted areas with their adjoining built-up areas that have a combined population of 10,000 persons or more. Built-up areas were areas contiguous to a gazetted area and had at least 60 per cent of their population (aged 10 years and over) engaged in non-agricultural activities. These areas must have modern toilet facilities in their housing units.

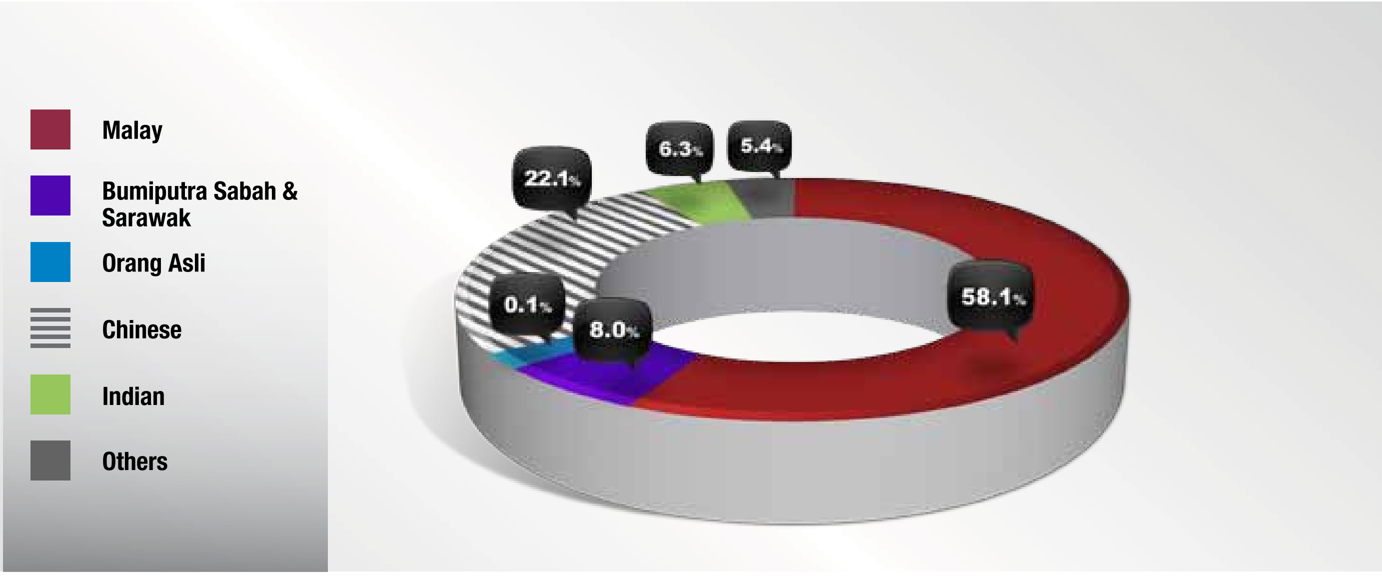
The population in urban areas have increased from census to census while the reverse is true of rural areas. The table below illustrates the change from 1980 to 2010.

	POPULATION [1]			USER BASE
YEAR	RURAL	URBAN	RURAL : URBAN	RURAL : URBAN
1980	65.8%	34.2%	1:0.5	..
1991	49.3%	50.7%	1:1	..
2000	38.0%	62.0%	1:1.6	..
2010	29.0%	71.0%	1:2.4	1:3.1[2]

.. *Not available*
1 *Population and Housing Census, Malaysia*
2 *IUS 2012*

ETHNICITY

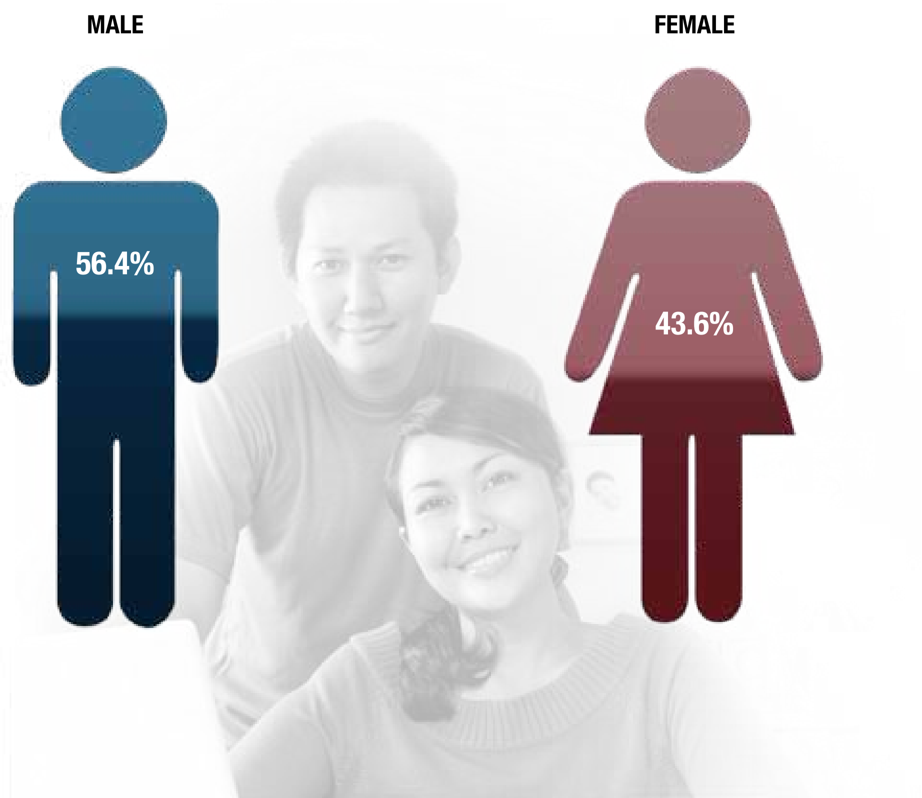
The ethnic make-up of Internet users in Malaysia is as follows:
Malay, 58.1%; Chinese, 22.1%; Bumiputra Sabah and Sarawak, 8.0%; Indian, 6.3%; Orang Asli, 0.1% and others, 5.4%.



This compares to the ethnic make-up of inhabitants in Malaysia as follows:
Malay, 54.8%; Chinese, 24.2%; Bumiputra Sabah & Sarawak and Orang Asli, 12.9%; Indian, 7.3% and others, 0.9%.

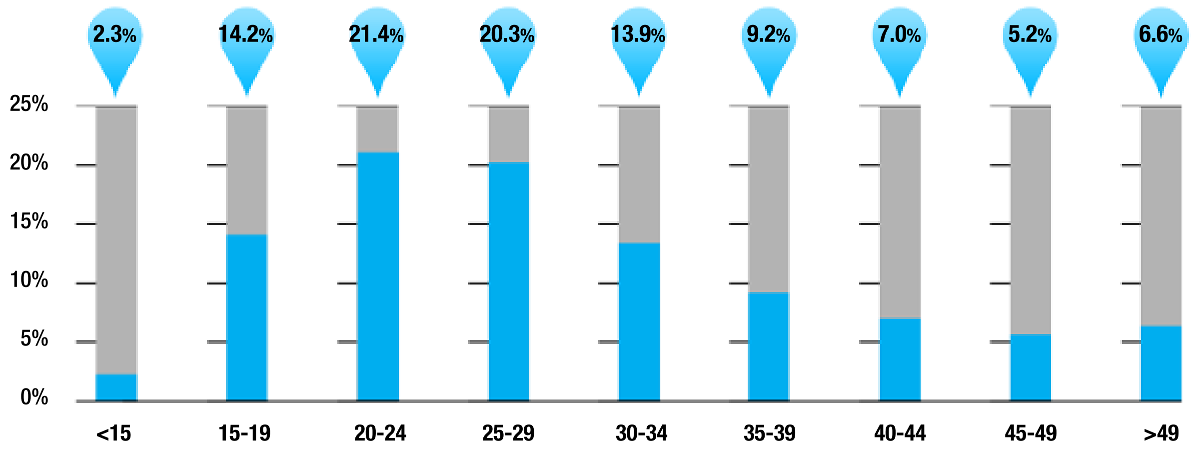
GENDER

Male users outnumber female users. They account for 56.4% of all users while female account for the remaining 43.6%.



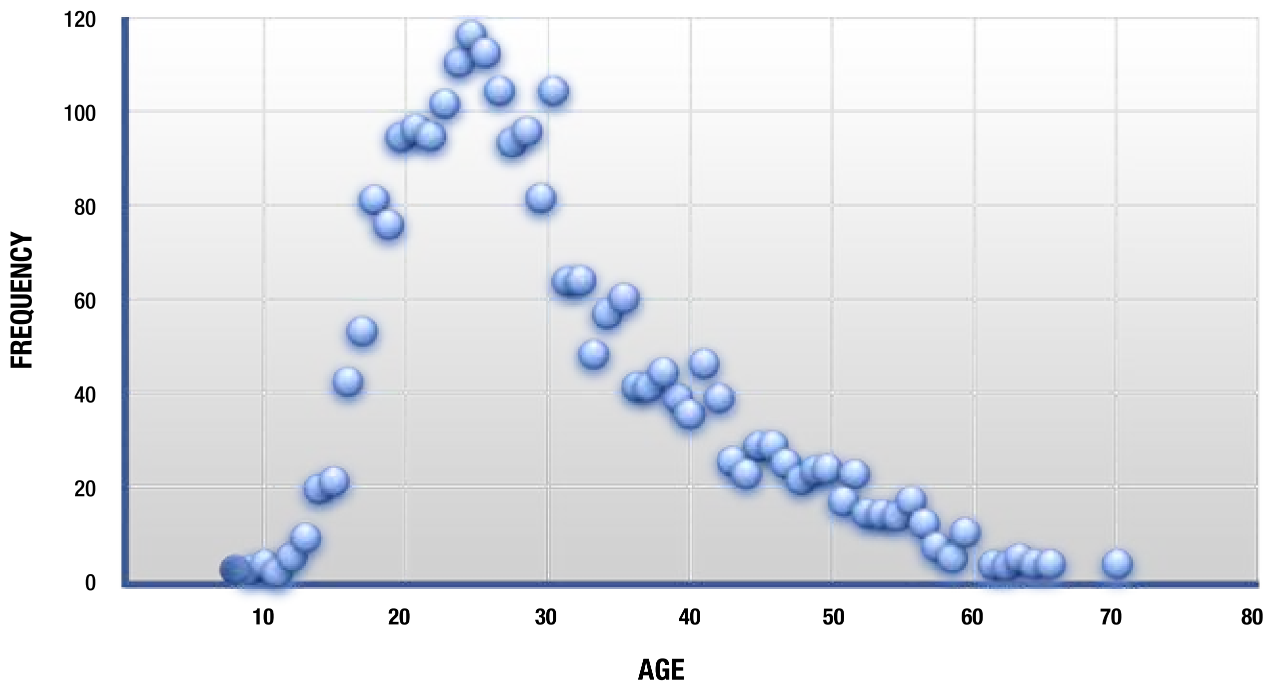
AGE

The Internet user base is characterised by its youthfulness. The survey found as much as 72.1% are on the younger side of 35 and that overall, the average age of the user is 29.65 years old.

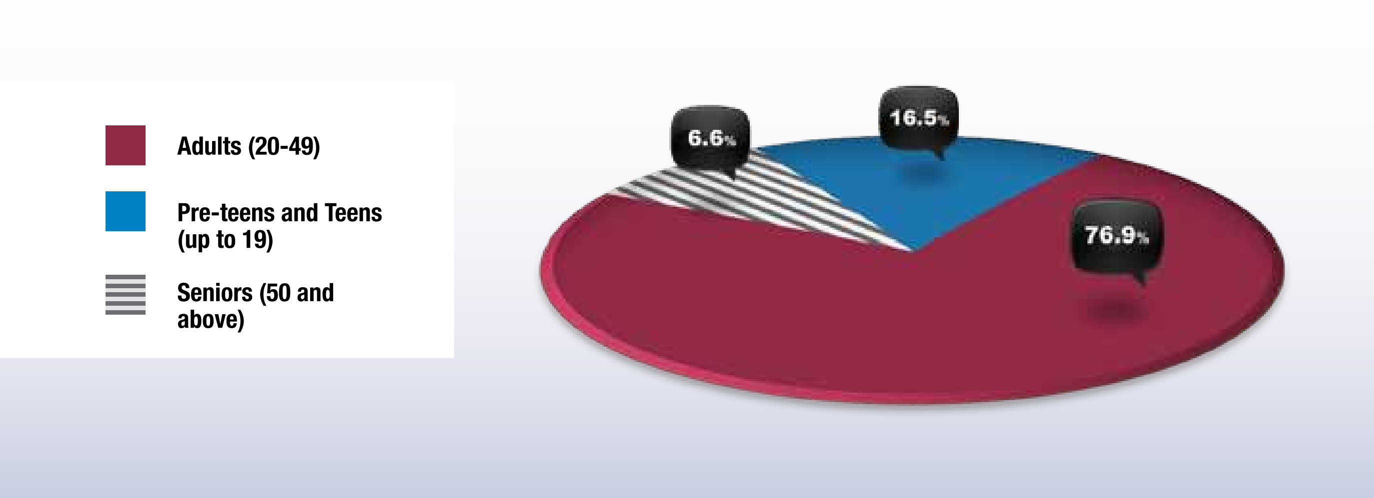


Fully 21.4% of all Internet users are in the 20-24 years old age group which is the group with the most users, followed closely by 20.3% of users who are 25-29 years old. At the younger end of the age spectrum, users in the 15-19 years old group totalled an impressive 14.2% which pip the 13.9% recorded by users in the 30-34 years old group. Percentages as expected, tapered with age. The survey noted a budding 2.3% of users who are less than 15 years old.

The youngest user encountered in the survey was a 7- year old.



In broad generational groups, Adults form the largest group of users accounting for 76.9%. “Adults” include all in the 20 – 49 years age group. “Pre-teens and Teens” that include the youngest to age 19, form 16.5% of users while “Seniors” which refer to those above 50 account for only 6.6% of all users.



EDUCATIONAL ATTAINMENT

Studies around the globe have shown that the highly educated are more inclined to use the Internet. This includes the study by Eurostat of the European Commission titled “Internet Use in Households and by Individuals in 2011” as well as the U. S. Department of Commerce’s work “Digital Nation: Expanding Internet Usage”. The IUS 2012 confirms that this is true for Malaysia as well. This is done by computing the ratio of percentage contribution to the Internet user base against the percentage contribution to the population base for a given Educational group. The results are presented in the table below:

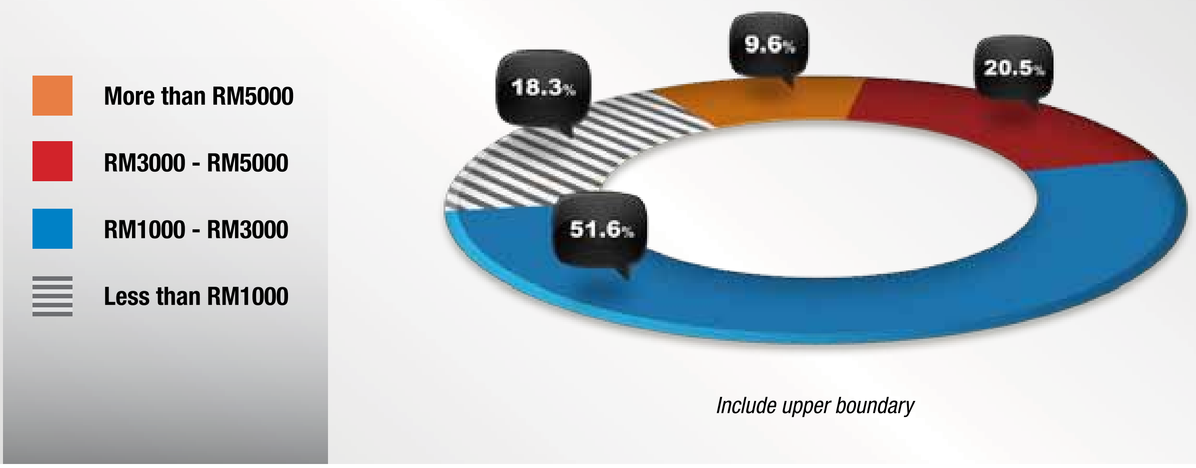
EDUCATIONAL ATTAINMENT	PERCENTAGE of Internet User Base (A)	PERCENTAGE of Population (B)	RATIO (A/B)
Tertiary	40.7	6.4	6.3
Post-secondary	8.1	2.6	3.1
Secondary school	46.9	38.1	1.2
Primary school	3.1	27.7	0.1
None	0.3	20.7	0.01
Others	0.1	4.5	0.2

As can be seen from the table, the ratio is highest in the group with tertiary education (6.3); second highest in the group with post-secondary education (3.1) and gets progressively smaller as the level of education falls.

INCOME

Users with recurrent monthly incomes

Among Internet users with recurrent monthly incomes in 2012, the median monthly income is RM2,229.6. The majority earns between RM1,000 to RM3,000 per month and accounts for 51.6% of all users with income.



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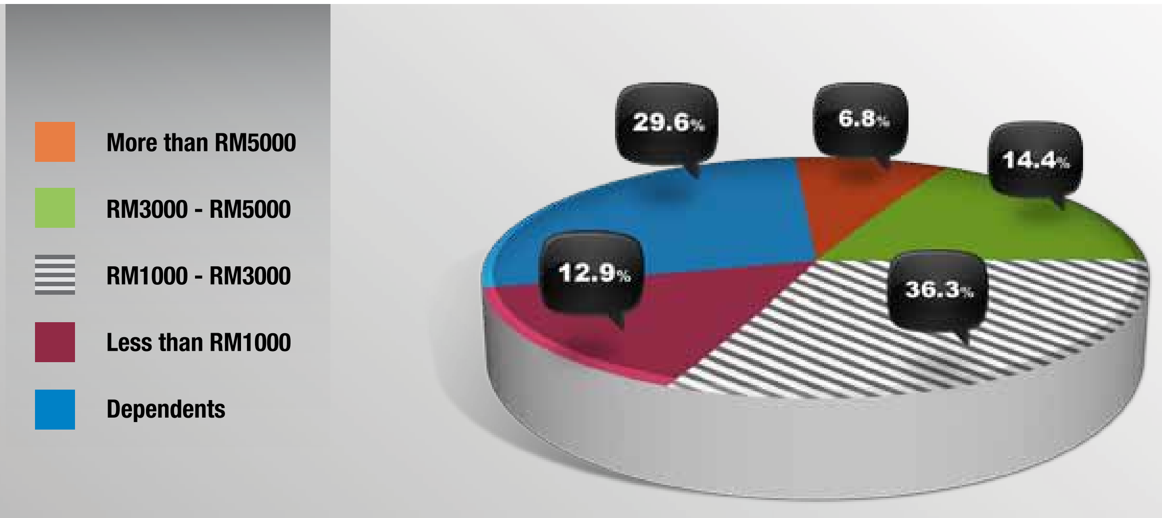
All users

18.4% of all users were still in school and essentially had no recurrent income. This swells the ranks of users classified as “dependents” with essentially no recurrent income to 29.6%, to make it the second largest group of users in terms of monthly income. Others in the dependent category includes the unemployed, housewives, the infirm and the retired.

Among all Internet users, dependents and income earners alike, the median monthly income drops to RM1,415.2. The modal income class is still RM1,000 to RM3,000 per month but accounts for only 36.3% of all users.



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TRENDS

TRENDS

MULTIPLE SUBSCRIPTIONS

The majority of users were from households that have an Internet subscription at home. They account for 82.7% of all users. On the other hand, 17.3% of users do not have an Internet subscription at home and had to rely on access away from home, such as at work, school, public Internet access centres, cybercafés, free Wi-Fi or even at another person's home.

Among the 82.7% of users with an Internet subscription at home, wireless access outnumber wired. The composition is as follows in descending order of prevalence:

Mobile Broadband	61.6%
ADSL	32.6%
Fibre	10.4%
WiMAX	7.2%
Unknown	1.6%
Dial-up	0.1%
Fixed Wireless	0.05%

The survey also observed that 86.0% of households with Internet at home have only one subscription while 13.0% have two subscriptions and 1.0% have three.

Among households with multiple subscriptions, 63.2% had some form of wired Internet in combination with wireless Internet while 36.8% had wireless connections only.

The survey showed that dial-up is clearly on the way out with only a following of a miniscule 0.1%. Far worse off is fixed wireless with only 0.05%.

BRAND LOYALTY AND CHURN

In the last three months preceding date of interview, 7.0% of all users reported having switched ISPs. In donor-beneficiary terms, the biggest donors are ISPs that provide ADSL and mobile broadband services while the main beneficiary are ISPs that provided fibre-optic access.

No switch to dialup was noted. Close to 93.0% of respondents who had subscriptions have stayed with their ISPs at least for the three months preceding the survey.

SOCIAL NETWORKING

Social networking has not shown any signs of waning.

Facebook by far is the leader, with a following of 84.2% of respondents. Twitter follows as a distant second with 14.3%. Google+ came in third with 2.6% and it has LinkedIn close on its heels with 2.4%. Other lesser known networking sites could garner only 1.1% collectively.
The majority of respondents use only one social networking website although they may have more than one account in that website. They account for 83.5% of all respondents. 14.1% maintain accounts in two different social networking websites. This drops quickly to 2.2% for three social networking websites and to an even lower 0.1% for 4 social networking websites.

14.3% respondents do not have any social network account. Reasons given included lack of time (44.0%), disinterest (49.7%), trust and security issues (7.7%) and others (10.6%).

MULTIPLE DEVICES

Most Malaysian users use only one device for access to the Internet. They account for 53.4% of all users. The remaining 46.6% use more than one device. The next survey in the series may show positions reversed.

The percentages reporting the number of devices used were as follows:

Number of devices	%
1	53.4
2	31.8
3	11.6
4 and more	3.2

Of the devices used, the most popular is the laptop (netbook/notebook) which has a following of 66.6 % of users. PCs are still making their presence felt with 42.2%. The smartphone is in third spot grossing 25.3 % of users while feature phones with 16.2%; tablets, 14.0%; and others, 0.3% make up the remainder.

Among those who use only 1 device, the laptop is the device of choice accounting for 50.2%. Second choice is the PC with 28.3% while the feature phone came in third with 9.7%. Smart phones accounted for only 7.6% and tablets 3.9%.

For those who must have 2 devices, the winning combo is the laptop-smartphone combo accounting for 29.1% within this group. This is followed by the PC-laptop with 27.7% and laptop-feature phone, 14.4%.

These top three combos and other combos are tabulated below:

COMBO	%
Laptop-Smartphone	29.1
PC-Laptop	27.7
Laptop-Feature phone	14.4
Laptop-Tablet	8.5
PC-Smartphone	8.5
PC-Feature phone	6.3
PC-Tablet	2.7
Tablet-Smartphone	1.9
Tablet-Feature phone	0.5
PC-Others	0.1
Laptop-Game	0.1
Laptop-Others	0.1
Smartphone-Others	0.1

There are users who reported using 3 devices to access the Internet. They account for 11.6% of all users. The top three within this group are PC-Laptop-Smartphone combo with 32.2%, PC-Laptop-Tablet combination, 24.1% and PC-Laptop-Feature Phone, 21.3%.

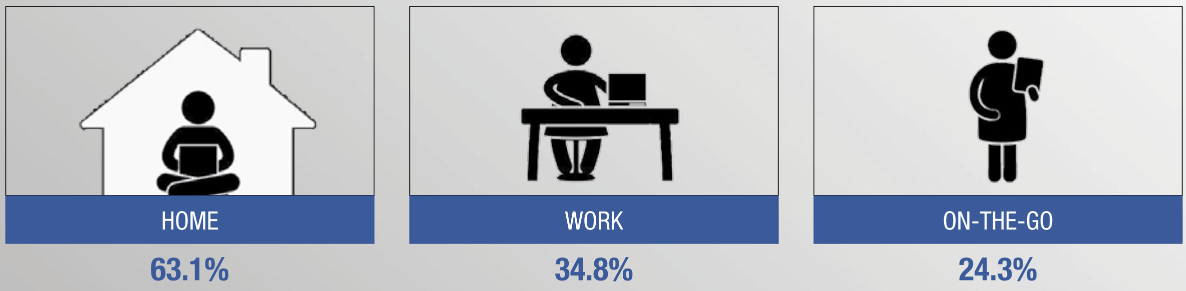
Groups of users reportedly using 4 and more devices accounted for 3.2% of all users. Breakdowns are not provided for this group.

COMBO	%
PC-Laptop-Smartphone	32.2
PC-Laptop-Tablet	24.1
PC-Laptop-Feature Phone	21.3
Laptop-Tablet-Smartphone	12.6
PC-Tablet-Smartphone	2.8
Laptop-Tablet-Feature phone	2.8
Laptop-Smartphone-Feature phone	1.4
PC-Laptop-Game Console	1.0
PC-Smartphone-Feature phone	0.7
PC-Laptop-Others	0.3
Laptop-Tablet-Game Console	0.3
Laptop-Smartphone-Others	0.3

MULTIPLE PLACES

The survey asked for the top three locations of use of the Internet, giving respondents a choice among home, place of work, place of education, another person's home, community Internet access facility, commercial Internet access facility, free Wi-Fi hotspots, on-the-go, and other locations.

The clear winners that emerged are Home, Place of work and On-the-go in that order with 63.1%, 34.8% and 24.3% respectively.



Free Wi-Fi hotspots garnered 22.8% of users, commercial Internet access facility,18.6%; places of education, 5.6%; another person's home, 5.3%; community Internet access facility (1.8%) and others (1.4%).

42.2% of users stick to only 1 location, while 38.0% surf in 2 locations and 19.8% in 3 locations.

Making up the bulk of the 42.2% who claim to go online in only 1 location are 21.8% who access the Internet exclusively at home as well as 6.0% exclusively at work. Nowadays with mobile Internet, location of access poses a challenge of definition and 5.8% only surf on their mobile dongles and data plan just about anywhere. Another 5.2% go online exclusively in cybercafés.

Among those who access the Internet in two places, the home-work combination tops the list with 11.4% (Home-Work, 6.9%; Work-Home, 4.5% in that order). This is followed by Home-free Wi-Fi with 4.6%.

The percentages decline quickly when it comes to users that access the Internet in three places. The one notable permutation was home-work-free Wi-Fi which had in its field, 4.8% of all users.

COUPLING DEVICES AND PLACES

A crosstab of number of devices against number of places of access yielded the table below:

		Devices					
		1	2	3	4	5	6
Places	1	31.0%	8.7%	1.9%	0.4%	0.1%	0.0%
	2	17.5%	14.5%	4.9%	1.0%	0.0%	0.0%
	3	4.8%	8.5%	4.8%	1.5%	0.1%	0.2%

From the table it can be seen that 35.5% of all Internet users access the Internet using multiple devices and in multiple places.

Among those who accessed the Internet using multiple devices and in multiple places, a two-device combo seems to be the order of the day with a 64.9% following. 27.4% used three devices and 6.9%, four. Less than 1% go beyond four devices.

In this group too, the most popular combination is the laptop-smartphone combination. This combo garnered 20.9% such users. The second most popular combination is the PC-laptop at 15.4% while the PC-laptop-smartphone and the laptop-feature phone combination are neck-to-neck at 9.2 and 9.4% respectively.

TABLES

TABLES

Caution is required in the use of the estimates tabulated below.

While the MCMC takes every care to minimise non-sampling errors, which cannot be quantified, the estimates presented are also subject to sampling error, which is a measure of the chance variation that occurs because a sample, and not the entire population is canvassed. The sampling error of an estimate is usually expressed as a percentage of that estimate to give the relative sampling error (RSE) of that estimate.

In general, estimates that are small are subject to high RSEs. As a guide, only estimates with RSEs of 25% or less are considered reliable for general use. Estimates with RSEs greater than 25% but less than or equal to 50% or less are denoted with asterisk in these tables and should be used with caution; while estimates with RSEs greater than 50% are denoted by two asterisks and are considered too unreliable for general use. However, these estimates may be aggregated with others until an RSE of less than 25% is obtained.

Confidence intervals for very small estimates should be based on the binomial distribution rather than the normal approximation to the binomial. As an alternative, the method of Korn and Graubard, 1998 may also be used.

Percentages may not add up to 100 because of rounding.

NATIONALITY	%	RSE
Malaysian	94.3	0.5
Non-Malaysian	5.7	8.2

ETHNICITY	%	RSE
Malay	58.1	1.7
Bumiputra Sabah / Sarawak	8.0	6.9
Orang Asli	0.1**	57.7
Chinese	22.1	3.8
Indian	6.3	7.8
Others	5.4	8.4

USUAL STATE OF RESIDENCE	%	RSE
Johor	12.2	5.4
Kedah	5.5	8.4
Kelantan	3.1	11.4
Melaka	3.9	10.0
Negeri Sembilan	3.6	10.5
Pahang	4.3	9.5
Perak	7.1	7.3
Perlis	0.6*	26.6
Pulau Pinang	4.8	8.9
Sabah	8.3	6.7
Sarawak	7.2	7.2
Selangor	24.5	3.5
Terengganu	2.7	12.0
W.P. Kuala Lumpur	11.5	5.6
W.P. Putrajaya	0.5*	28.8
W.P. Labuan	0.3*	37.7

URBAN RURAL	%	RSE
Rural	24.2	3.6
Urban	75.8	1.1

GENDER	%	RSE
Male	56.4	1.8
Female	43.6	2.3

AGE	%	RSE
< 15	2.3	13.2
15 - 19	14.2	5.0
20 - 24	21.4	3.9
25 - 29	20.3	4.0
30 - 34	13.9	5.0
35 - 39	9.2	6.3
40 - 44	7.0	7.4
45 - 49	5.2	8.6
> 49	6.6	7.6

BROAD GENERATIONAL GROUPS	%	RSE
Pre-teens and Teens (up to 19)	16.5	4.5
Adults (20 - 49)	76.9	1.1
Seniors (50 and above)	6.6	7.6

EDUCATIONAL ATTAINMENT	%	RSE
Degree or higher (including Advanced Diploma)	17.0	4.5
Diploma	14.8	4.8
STPM/STAM/Certificate	8.1	6.8
SPM/SPVM	30.1	3.1
PMR	4.0	10.0
Secondary school	4.2	9.6
Primary school	2.5	12.6
None	0.3*	37.7
Others	0.7	24.2
Still studying	18.4	4.2

STILL STUDYING	%	RSE
College/University	48.5	6.4
Secondary school	46.9	6.6
Primary school	3.1*	26.6
Others	1.5*	37.7

EDUCATIONAL ATTAINMENT	%	RSE
Tertiary	40.7	2.4
Post-Secondary	8.1	6.8
Secondary	46.9	2.1
Primary	3.1	11.4
None	0.3*	37.7
Others	1.0	20.3

INCOME CATEGORY	%	RSE
RM5,000 and above	6.8	7.5
RM3,000 - RM5,000	14.4	4.9
RM1,000 - RM3,000	36.3	2.7
Less than RM1,000	12.9	5.3
Dependents	29.6	3.1

INTERNET SUBSCRIPTION	%	RSE
Yes	82.7	0.9
No	17.3	4.4

MULTIPLE SUBSCRIPTIONS	%	RSE
One subscription	86.0	0.9
Multiple subscriptions	14.0	5.5

ACCESS TECHNOLOGY	%	RSE
Mobile Broadband	61.6	1.8
ADSL	32.6	3.2
Fibre	10.4	6.5
WiMAX	7.2	8.0
Unknown	1.6	17.3
Dial-up	0.1**	57.7
Fixed Wireless	0.05**	..

Multiple Responses

BRAND LOYALTY	%	RSE
Switched ISP in last three months	7.0	8.1
Did not switch ISP in last three months	93.0	0.6

PLACES OF ACCESS	%	RSE
First		
Home subscription	50.8	2.0
Work	18.9	4.2
Place of education	1.6	15.7
Another person's home	1.8	15.1
Community Internet access facility	0.7	24.9
Commercial Internet access facility	10.1	6.0
Free Wi-Fi anywhere via own equipment	3.9	10.0
Anywhere using mobile broadband or data plan via own equipment	11.5	5.6
Other locations	0.7	24.2

Multiple Responses

Second		
Home subscription	11.5	5.6
Work	14.7	4.9
Place of education	3.4	10.8
Another person's home	2.2	13.5
Community Internet access facility	0.5*	27.7
Commercial Internet access facility	5.9	8.0
Free Wi-Fi anywhere via own equipment	10.6	5.9
Anywhere using mobile broadband or data plan via own equipment	8.6	6.6
Other locations	0.4*	30.1

Multiple Responses

Third

Home subscription	0.8	22.9
Work	1.1	18.8
Place of education	0.6*	25.7
Another person's home	1.3	17.3
Community Internet access facility	0.6*	25.7
Commercial Internet access facility	2.4	12.8
Free Wi-Fi anywhere via own equipment	8.4	6.7
Anywhere using mobile broadband or data plan via own equipment	4.3	9.5
Other locations	0.3*	37.7

Multiple Responses

Overall

Home subscription	63.1	1.5
Work	34.8	2.8
Place of education	5.6	8.3
Another person's home	5.3	8.5
Community Internet access facility	1.8	14.9
Commercial Internet access facility	18.6	4.2
Free Wi-Fi anywhere via own equipment	22.8	3.7
Anywhere using mobile broadband or data plan via own equipment	24.3	3.6
Other locations	1.4	16.8

Multiple Responses

ACCESS DEVICE	%	RSE
PC	42.2	2.4
Netbook/Notebook/Laptop	66.6	1.4
Tablets	14.0	5.0
Game Console	0.7	23.5
Smartphone	25.3	3.5
Other mobile phone	16.2	4.6
Others	0.3*	35.3

Multiple Responses

SOCIAL NETWORKING	%	RSE
Facebook	84.2	0.9
Twitter	14.3	4.9
Google+	2.6	12.4
LinkedIn	2.4	12.9
Other social networks	1.1	19.5
Do not access any social network	14.3	4.9

Multiple Responses

REASONS FOR NOT SOCIAL NETWORKING	%	RSE
Not enough time	44.0	6.0
Not interested	49.7	5.4
Trust/Security	7.7	18.5
Others	10.6	15.5

Multiple Responses

MCMC STATISTICAL PUBLICATIONS

POCKET BOOK OF STATISTICS	The MCMC publishes the following pocket books : 1. Communications & Multimedia: Pocket Book of Statistics (ISSN:2180-4656), a quarterly statistical bulletin of the Communications & Multimedia industry. 2. Postal & Courier Services: Pocket Book of Statistics (ISSN: 2231-9913), a half yearly statistical bulletin of the Postal & Courier industry.
SURVEY REPORTS	Issued by the MCMC to disseminate survey findings. These reports are aimed at the general to intermediate user audience.

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