



2008 Survey on the Wireless Internet Use

Executive Summary
2008. 11





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I. Introduction

Sample Eligibility

Individuals Ages 12 to 59

Data Collection

Face to Face Interviews

Sample Size

3,000 persons

Sample Error

$\pm 1.79\%$ p (at 95% Confidence Level)

Sampling Method

Multi-Stage Stratified Sampling

Fieldwork Period

September 1 – September 31, 2008 (30 days)

■ Glossary ■

- o Wireless Internet: Internet service through wireless devices(mobile phone, Notebook PC, PDA) using mobile telecommunication network or wireless data telecommunication network (Wireless LAN, Wibro).
- Mobile Phone Wireless Internet: Internet service provided by telecom companies such as SKT(Nate), KTF(MagicN/SHOW), LGT(ez-i/Oz) through mobile phones (cellular phone, smart phone, PDA phone).
- Wireless LAN: Internet service through wireless devices (Notebook PC, smart phone/PDA phone, PDA) within a certain distance (Hot Zone) from the installed AP (Access Point).
- Broadband Wireless Internet: Internet services through HSDPA or Wibro (3G Wireless Internet access service).
 - HSDPA (High-Speed Downlink Packet Access): Broadband wireless Internet service through telecommunication networks. Access is available by linking exclusive USB modems (SKT: T LOGIN, KTF: iPlug) to notebook PC or PDA.
 - Wibro (Mobile Internet): Broadband wireless Internet service through the wireless data telecommunication networks. Access is available by using Wibro devices or linking Wibro USB modems(KT: Wibro, SKT: T LOGIN) to notebook PC or PDA.



II. Wireless Internet Usage

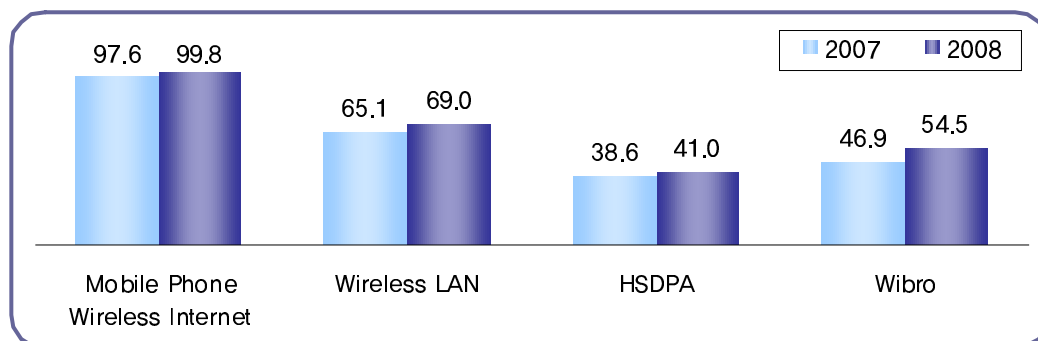
1. Wireless Internet Awareness and Usage Environment



More than half (54.5%) of the population ages 12–59 are aware of Wibro service

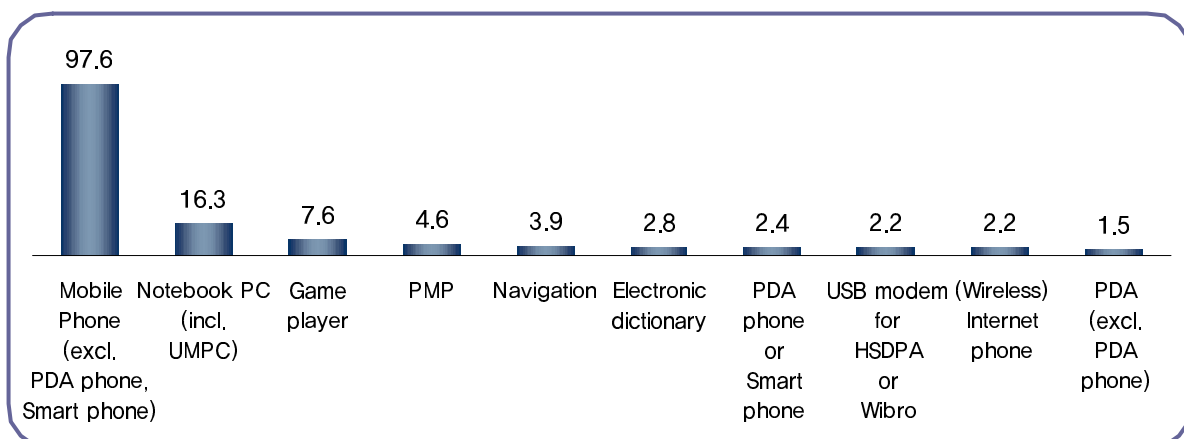
- As of September 2008, almost all (99.8%) of the population ages 12–59 have either heard of or are aware of the mobile phone wireless Internet, and 69.0% are aware of the wireless LAN. Those who are aware of Broadband wireless Internet services, Wibro and HSDPA, account for 54.5% and 41.0%, respectively.
- The awareness of Wibro has increased by 7.6%p, compared with 46.9% in 2007, followed by the awareness of Wireless LAN(3.9%p), HSDPA(2.4%p), and Mobile Phone Wireless Internet (2.2%p).

[Fig 1. Awareness by the Wireless Internet Service Type(%)]



- Among the wireless Internet-enabled devices the possession rate of 'Mobile Phone' is the highest with 97.6%, followed by 'Notebook PC(16.3%)', 'Game player(7.6%)', and 'PMP(4.6%)'.

[Fig 2. The Possession Rate of Wireless Internet Device(Multiple Responses, %)]





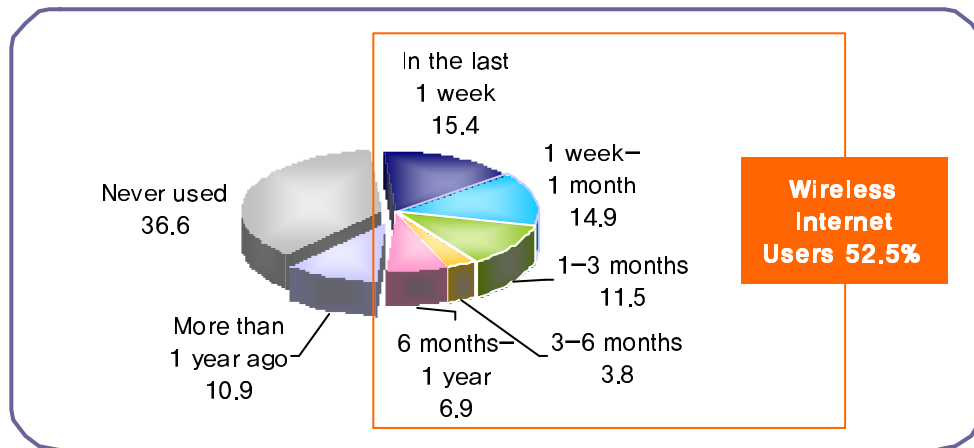
2. Wireless Internet Usage Rate



52.5% of the population ages 12–59 use the wireless Internet

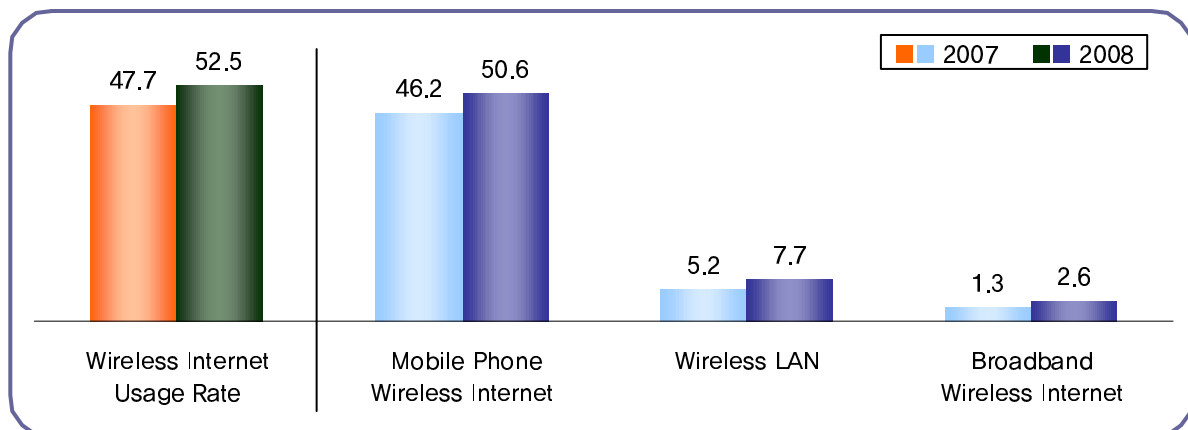
- As of September 2008, 52.5% of the population ages 12–59 are 'wireless Internet users', who have used in the last 1 year at least one of the wireless Internet services among mobile phone wireless Internet, wireless LAN, and Broadband wireless Internet.

[Fig 3. Wireless Internet Usage Status(%)]



- By service type, the usage rate of mobile phone wireless Internet ranks highest at 50.6%, followed by wireless LAN at 7.7%, and Broadband wireless Internet at 2.6%.
- The wireless Internet usage rate has increased by 4.8%p from 2007, whereas the usage rate of mobile phone wireless Internet, wireless LAN and Broadband wireless Internet are up by 4.4%p, 2.5%p and 1.3%p, respectively.

[Fig 4. Wireless Internet Usage Rate by Service Type(%)]





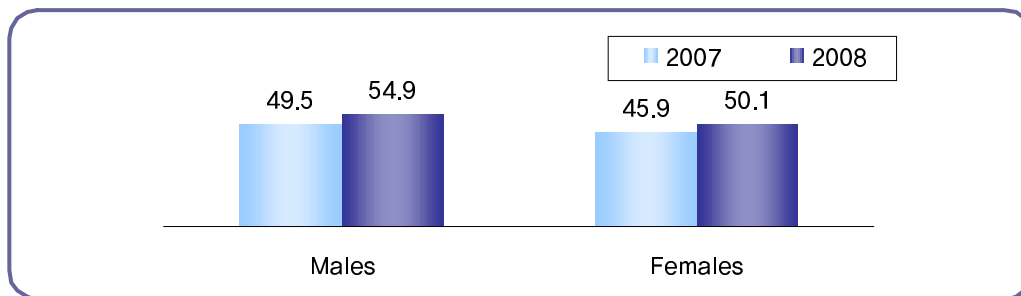
A. Wireless Internet Usage Rate by Gender



54.9% of males, 50.1% of females are wireless Internet users

- ▶ Wireless Internet usage rate of males and females is 54.9% (up by 5.4%p from the previous year) and 50.1% (up by 4.2%p from the previous year), respectively. This shows that males use wireless Internet slightly more (4.8%p) than females.

[Fig 5. Wireless Internet Usage Rate by Gender(%)]



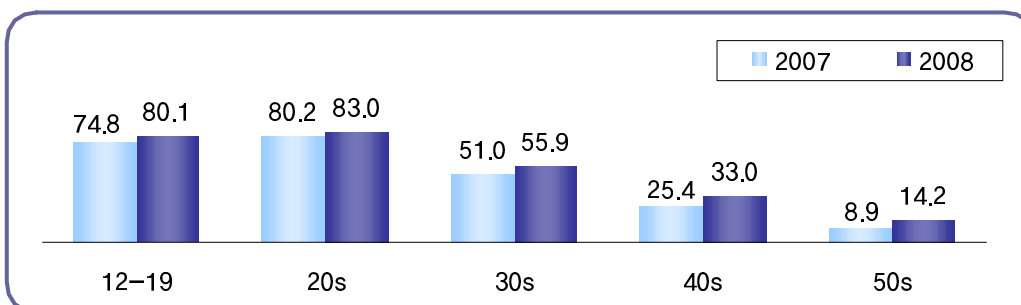
B. Wireless Internet Usage Rate by Age



Over 80% of those ages 12–29 are wireless Internet users

- ▶ Over 80% of those ages 12–19(80.1%) and the 20s(83.0%) are wireless Internet users. The wireless Internet usage rate of the 30s, the 40s, and the 50s are 55.9%, 33.0%, and 14.2%, respectively.
- ▶ Compared to 2007, the 40s shows the largest increase(7.6%p) in the wireless Internet usage rate, followed by those ages 12–19 and the 50s(5.3%p each), the 30s(4.9%p), and the 20s(2.8%p).

[Fig 6. Wireless Internet Usage Rate by Age(%)]





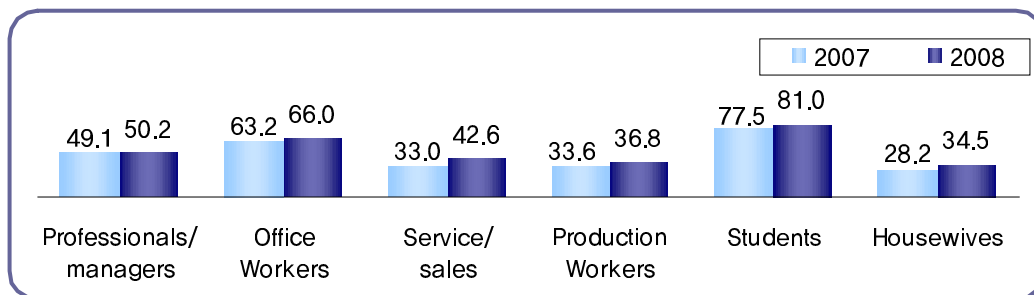
C. Wireless Internet Usage Rate by Occupation



8 out of 10 students are wireless Internet users

- ▶ The wireless Internet usage rate of students is the highest with 81.0%, followed by white-collars(66.0%), professionals/managers(50.2%), and service/sales(42.6%).
- ▶ Compared to 2007, the wireless Internet usage rate of service/sales and housewives shows a relatively larger increase of 9.6%p and 6.3%p, respectively.

[Fig 7. Wireless Internet Usage Rate by Occupation(%)]



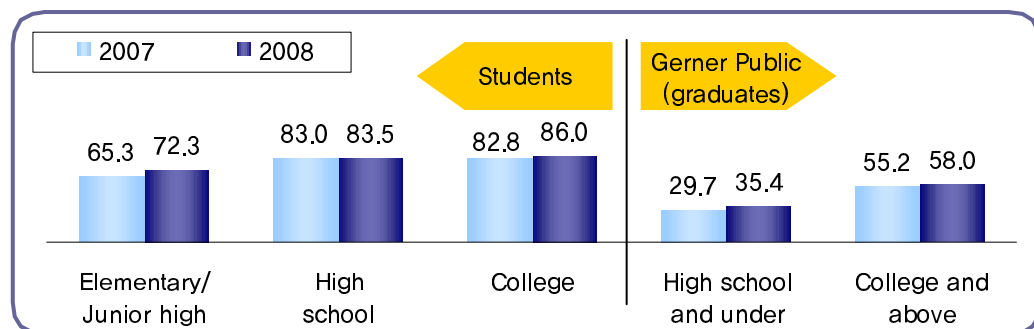
D. Wireless Internet Usage Rate by Education



86.0% of college (graduate) students are wireless Internet user

- ▶ Over 80% of high school students(83.5%) and college(graduate) students(86.0%) are wireless Internet users. As evidenced by 72.3% of the wireless internet usage rate among elementary/junior high students, students show a relatively higher rate of wireless Internet usage than the general public.
- ▶ Compared to 2007, wireless Internet usage rate of elementary/junior high students and the general public with high school diploma or below has increased by 7.0%p and 5.7%p, respectively.

[Fig 8. Wireless Internet Usage Rate by Education(%)]





III. Mobile Phone Wireless Internet Usage

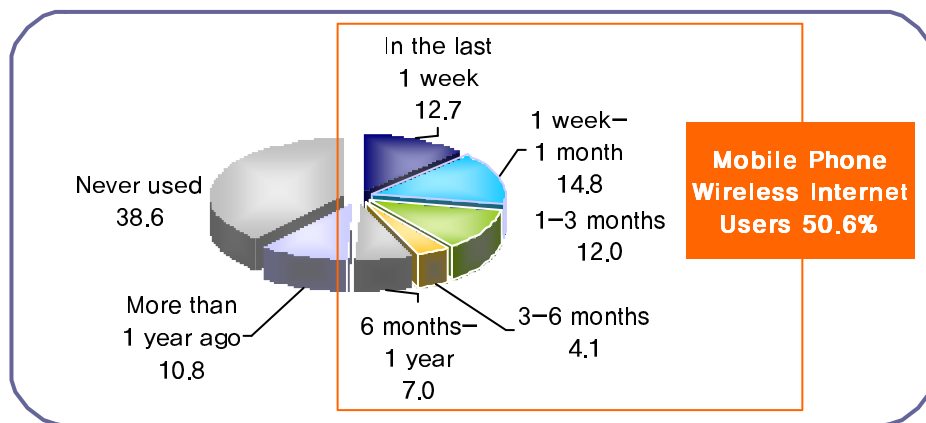
1. Mobile Phone Wireless Internet Usage Rate



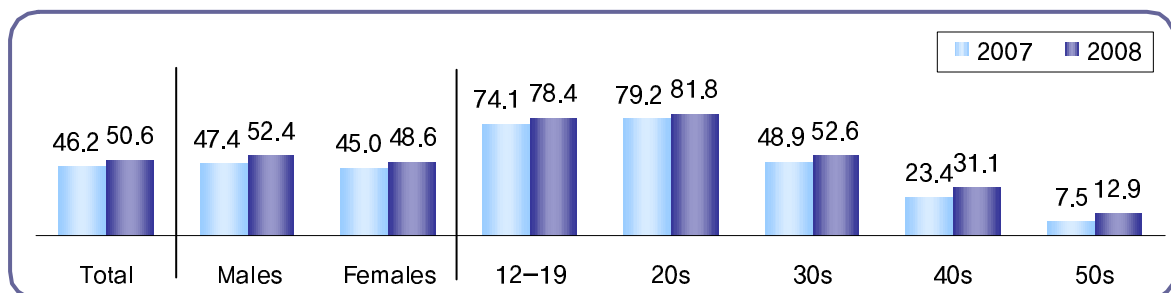
81.8% of the 20s use the mobile phone wireless Internet

- ▶ 50.6% of the population ages 12–59 (up by 4.4%p from the previous year) are 'Mobile phone wireless Internet users', who have used the wireless Internet through mobile phones in the last 1 year, while 27.5% have used the mobile phone wireless Internet in the last 1 month ('In the last 1 week' 12.7%, '1 week–1 month' 14.8%).
- ▶ Slightly more males (52.4%) than females (48.6%) use mobile phone wireless Internet. By age, the 20s ranks highest at 81.8%, followed by those ages 12–19 (78.4%), the 30s (52.6%), and the 40s (31.1%).
- ▶ Compared to 2007, mobile phone wireless Internet usage rate of male and female is up by 5.0%p and 3.6%p, respectively. By age, the 40s and the 50s show a relatively larger increase of 7.7%p and 5.4%p.

[Fig 9. Mobile Phone Wireless Internet Usage Status(%)]



[Fig 10. Mobile Phone Wireless Internet Usage Rate by Gender and Age(%)]





2. Mobile Phone Wireless Internet Usage Pattern

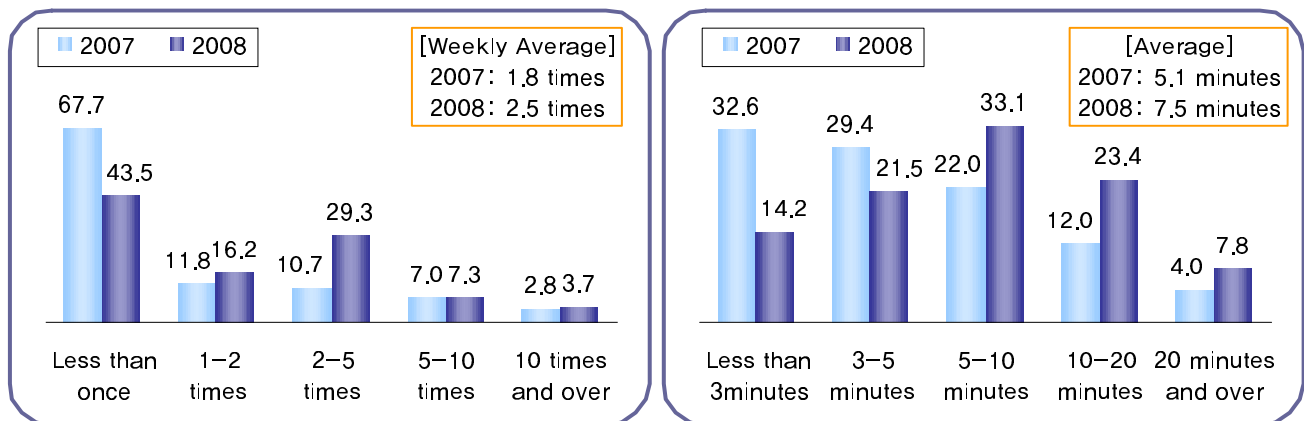
A. Frequency and Usage Hours



Weekly average of 2.5 times, and 7.5 minutes per access use

- The mobile phone wireless Internet users access the wireless Internet an average of 2.5 times a week(1.8 times in 2007), and spend an average of 7.5 minutes(5.1 minutes in 2007) per access.

[Fig 11. Frequency and Hours on Mobile Phone Wireless Internet Usage(%)-Mobile Phone Wireless Internet Users]



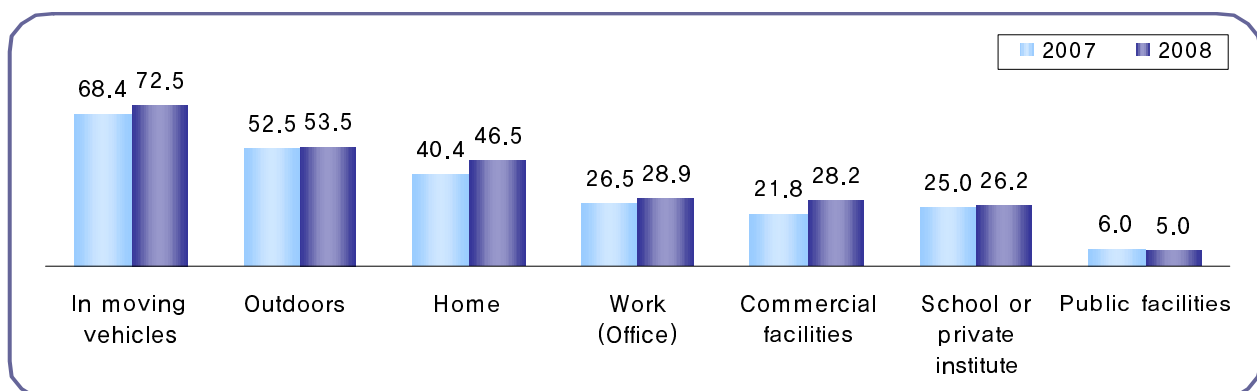
B. Places for Mobile Phone Wireless Internet Usage



Main place used for mobile phone wireless Internet is 'In moving vehicles' or 'Outdoors'

- 'In moving vehicles(e.g. bus, subway, car, and train)' ranks highest at 72.5%, followed by 'Outdoors(e.g. streets, park)(53.5%)', 'Home(46.5%)', Workplace(28.9%)', and 'Commercial facilities(e.g. coffee shop, restaurant, movie theater)(28.2%)'.

[Fig 12. Places for Mobile Phone Wireless Internet(Multiple responses, %)-Mobile Phone Wireless Internet Users]





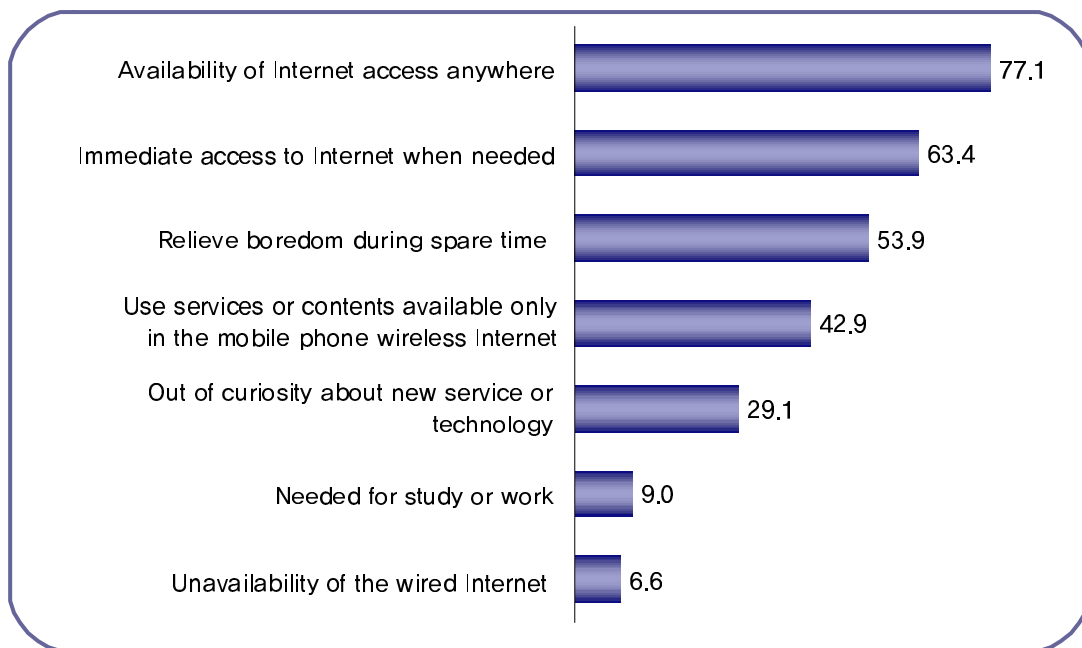
C. Reasons for Using Mobile Phone wireless Internet



Manly, because 'Availability of Internet access from anywhere(77.1%)'

- ▶ The main reasons for using the mobile phone wireless Internet are 'Availability of Internet access from anywhere(77.1%)' or 'Immediate availability of Internet access when needed(63.4%)'.
- ▶ Meanwhile, over 40% access the mobile phone wireless Internet to 'Relieve boredom during spare time(53.9%)', and 'Use services or contents available only in the mobile phone wireless Internet(42.9%)'.

[Fig 13. Reasons for Using Mobile Phone Wireless Internet(Multiple Responses, %)
-Mobile Phone Wireless Internet Users]





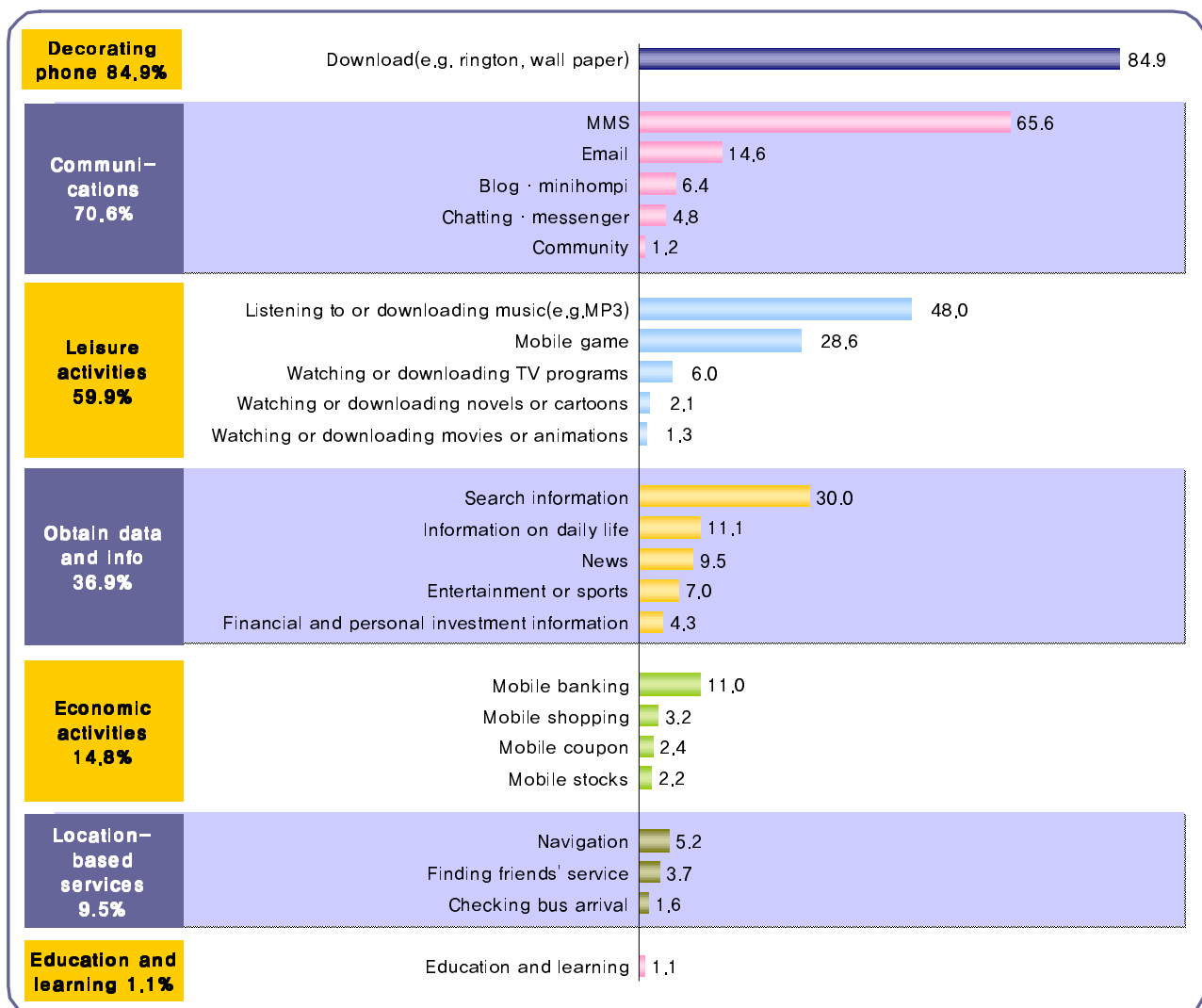
3. Mobile Phone Wireless Internet Service Usage



More than half use 'decorating phone(84.9%)' or 'MMS(65.6%)'

- ▶ For the usage of services through mobile phone wireless Internet, 'Decorating phone' ranks highest at 84.9%, followed by communications and leisure activities at 70.6% and 59.9%, respectively.
- ▶ More specifically, 'Downloading ringtones or wallpapers(84.9%)' ranks highest, followed by 'MMS(excluding SMS)(65.6%)', 'Listening to or downloading music(48.0%)', 'Information search(30.0%)', and 'Mobile game(28.6%)'.

[Fig 14. Mobile Phone Wireless Internet Service Usage(Multiple Responses, %)
-Mobile Phone Wireless Internet Users]





IV. Wireless LAN Usage

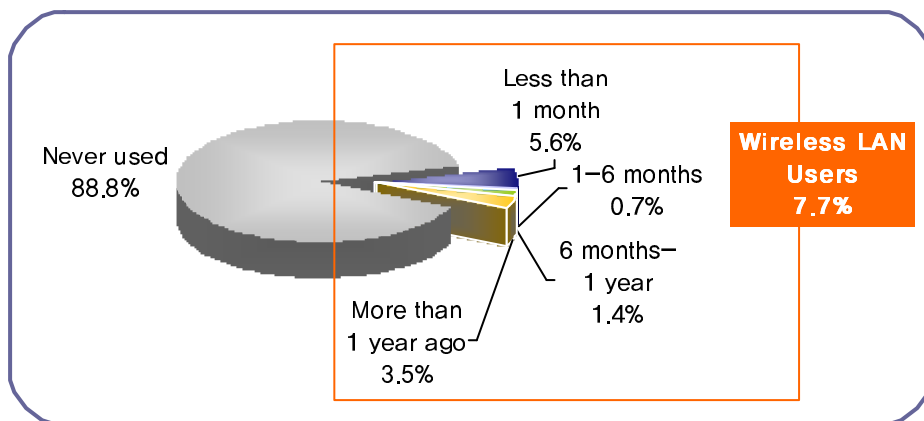
1. Wireless LAN Usage Rate



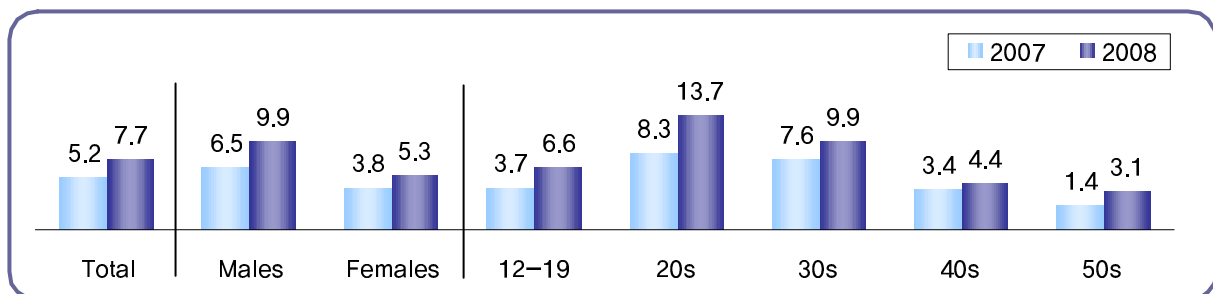
7.7% of the population ages 12–59 are wireless LAN users

- ▶ 7.7%(up by 2.5%p from the previous year) of the population ages 12–59 have used the wireless LAN in the last 1 year('wireless LAN users').
- ▶ Slightly more males(9.9%) than females(5.3%) use wireless LAN. By age, the usage rate of the 20s(13.7%) and the 30s(9.9%) is relatively higher than other age groups.

[Fig 15. Wireless LAN Usage Status(%)]



[Fig 16. Wireless LAN Usage Rate by Gender and Age(%)]





2. Wireless LAN Usage Pattern

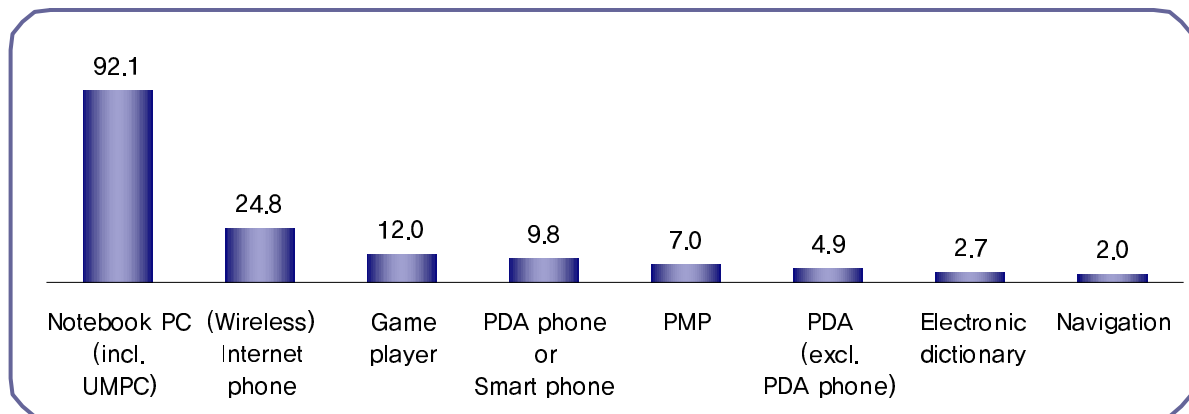
A. Wireless LAN Access Devices



Most of the wireless LAN users access the wireless LAN through 'Notebook PC (92.1%)'

- ▶ Almost all(92.1%) of the wireless LAN users access the Internet through 'Notebook PC', while 24.8% through '(Wireless)Internet phone', 12.0% through 'Game player', and 9.8% through 'PDA phone or Smart phone'.

[Fig 17. Wireless LAN Access Device(Multiple Responses, %)-Wireless LAN Users]





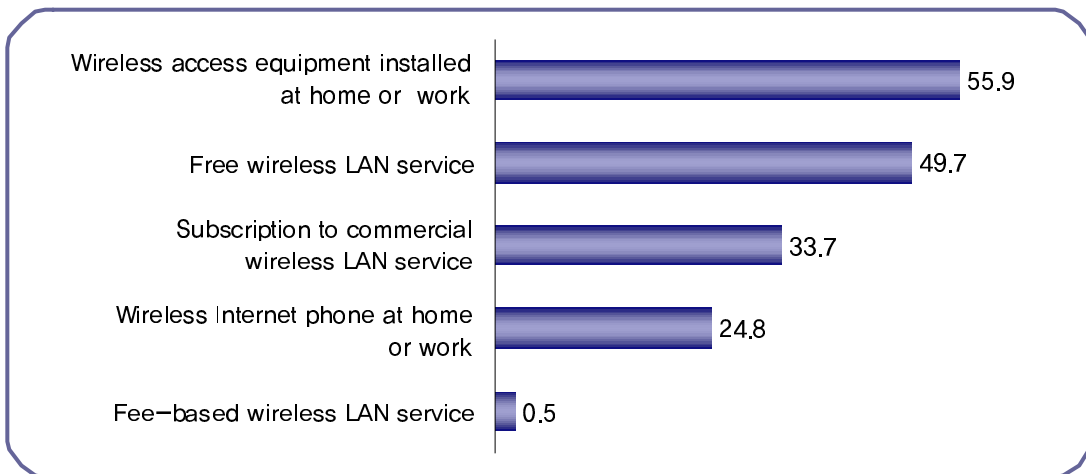
B. Wireless LAN Access Method



More than half access the wireless LAN through 'Wireless access equipment installed at home or work'

- ▶ 55.9% of the wireless LAN users have used the Wireless LAN through 'Wireless access equipment installed at home or work', while other access methods such as 'Free wireless LAN service' and 'Subscription to commercial wireless LAN service' account for 49.7% and 33.7%, respectively.

[Fig 18. Wireless LAN Usage Method(Multiple Responses, %)-Wireless LAN Users]





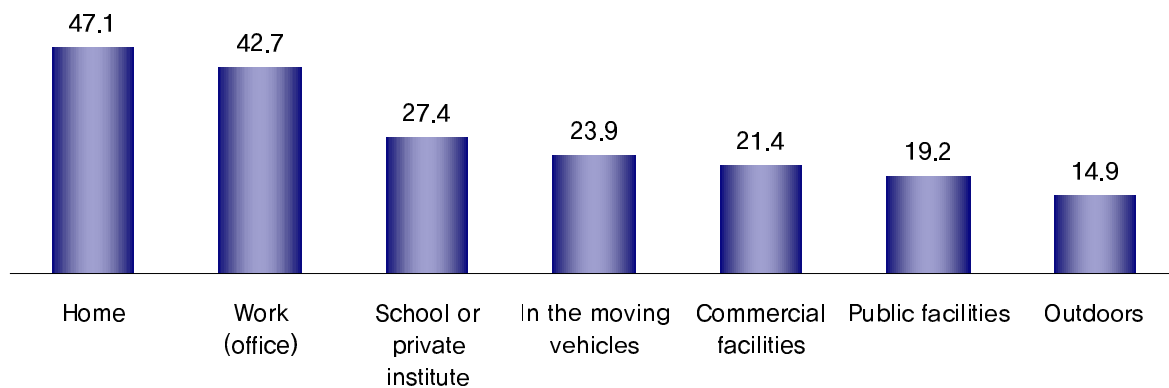
C. Places for Wireless LAN



Mainly use wireless Lan at 'Home (47.1%)' or 'Work(42.7%)'

- ▶ Wireless LAN is used most at 'Home(47.1%)' or 'Work(Office)(42.7%)', followed by 'School, private institute(27.4%)', 'In moving vehicles(23.9%)', and 'Commercial facilities(e.g. coffee shop, restaurant, movie theater)(21.4%)'

[Fig 19. Places for Wireless LAN(Multiple Responses, %)-Wireless LAN Users]





V. Broadband Wireless Internet Usage

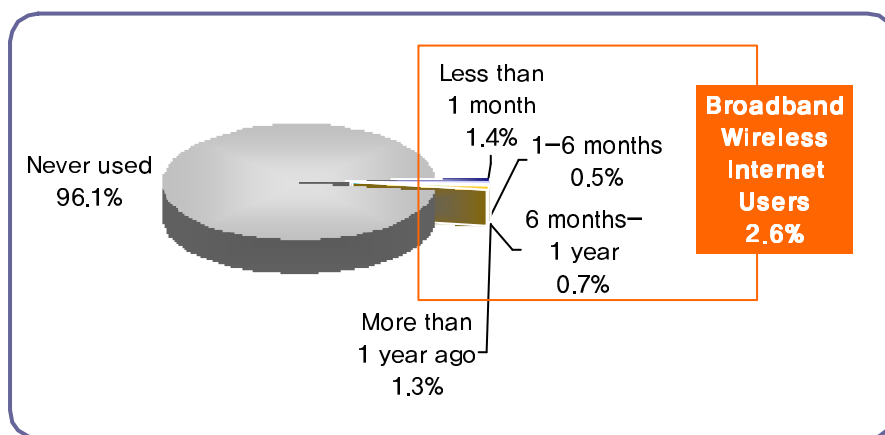
1. Broadband Wireless Internet Usage Rate



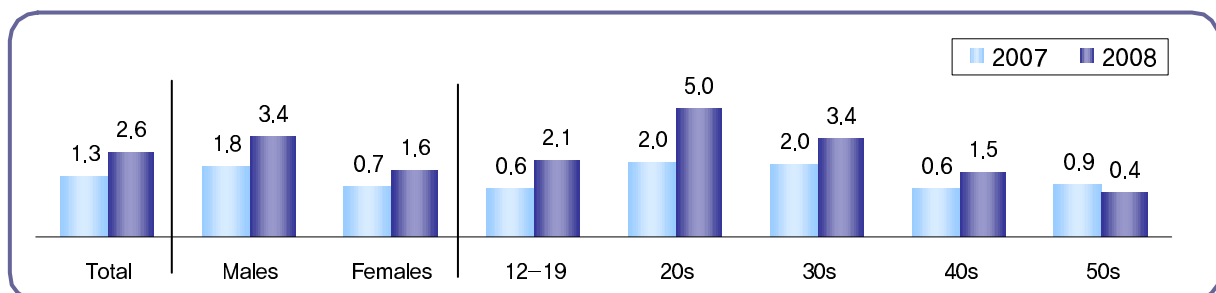
Broadband Wireless Internet usage rate is 2.6%

- ▶ 2.6% of the population ages 12–59 have used Broadband wireless Internet such as HSDPA or Wibro in the last 1 year.
- ▶ Males(3.4%) show a slightly higher Broadband wireless Internet usage rate than females(1.6%). By age, the usage rate of the 20s(5.0%) and the 30s(3.4%) is relatively higher than other age groups.

[Fig 20. Broadband Wireless Internet Usage Status(%)]



[Fig 21. Broadband Wireless Internet Usage Rate by Gender and Age(%)]



※ The Broadband wireless Internet usage rate of 2007 is the result of reanalysis in consideration of the changes made in 2008 in the definition/scope of Broadband wireless Internet(excluding 'HSDPA usage through 3G mobile phone' which was included in the 2007 Survey).



2. Broadband Wireless Internet Usage Pattern

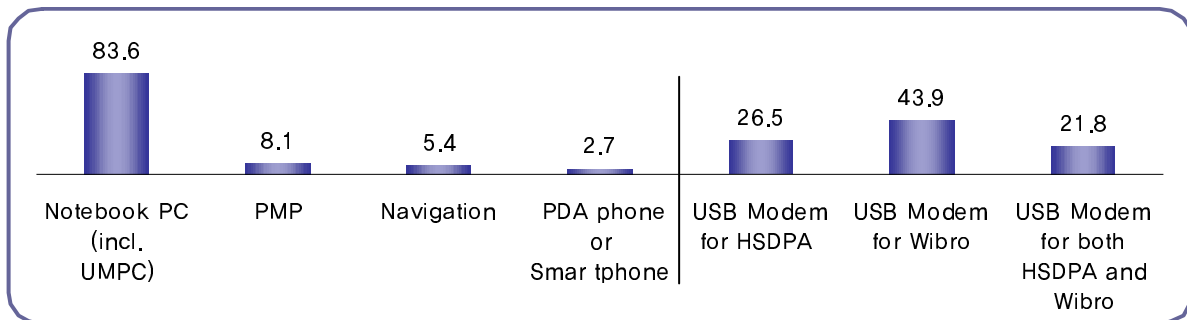
A. Broadband Wireless Internet Access Device



Mainly, access through 'Notebook PC(83.6%)' or 'USB Modem for Wibro services(43.9%)'

- ▶ Broadband wireless Internet is used most through 'Notebook PC(83.6%)', 'USB Modem for Wibro services(43.9%)', followed by 'USB Modem for HSDPA(26.5%)' and 'USB Modem for both HSDPA and Wibro(21.8%)'.

[Fig 22. Broadband Wireless Internet Access Device
(Multiple Responses, %)-Broadband Wireless Internet Users]



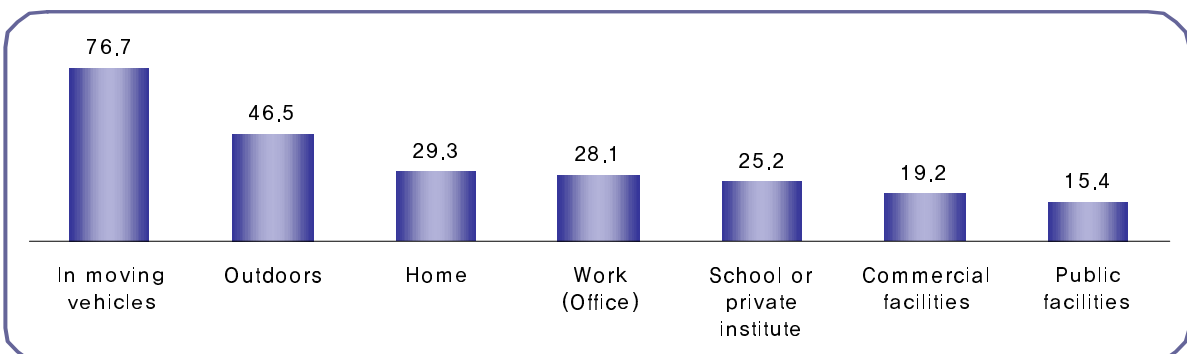
B. Places for Broadband Wireless Internet



Mainly, use 'In moving vehicles(76.7%)'

- ▶ Among the places used for the Broadband wireless Internet, 'In the moving vehicles' ranks highest at 76.7%, followed by 'Outdoors(e.g. streets and park)(46.5%)', 'Home(29.3%)', 'Work(28.1%)', and 'School, private institute (25.2%)'.

[Fig 23. Places for Broadband Wireless Internet Usage
(Multiple Responses, %)-Broadband Wireless Internet Users]





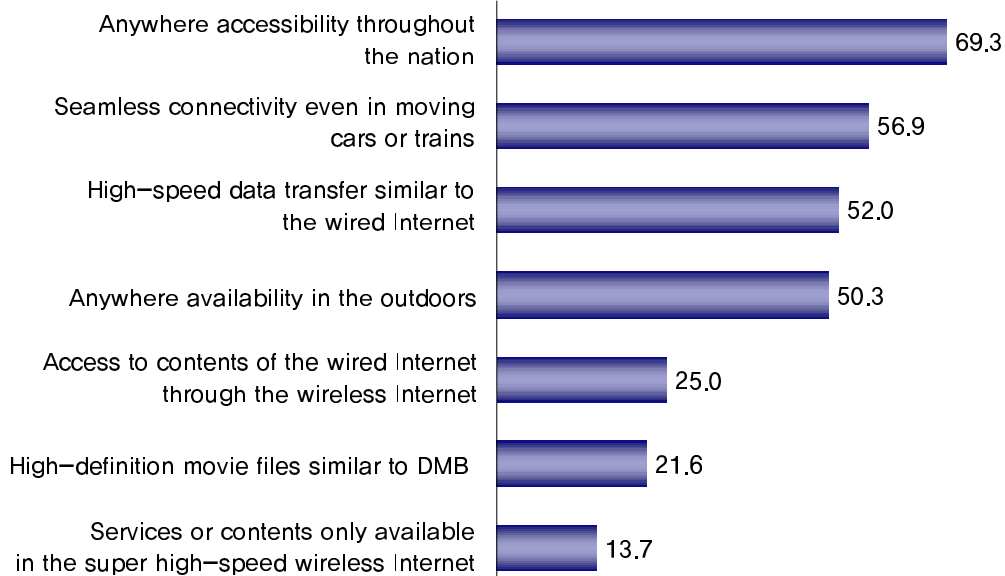
C. Broadband Wireless Internet Users' Perception



'Anywhere accessibility throughout the nation(69.3%)' is the most useful

- ▶ The population ages 12–59 perceive that the Broadband wireless Internet is most useful for 'Anywhere accessibility throughout the nation(69.3%)', followed by 'Seamless connectivity even in moving cars or trains(56.9%)', 'High-speed data transfer similar to the wired Internet(52.0%)', and 'Anywhere availability in the outdoors(e.g. streets, park)(50.3%)'.

[Fig 24, Perception toward Broadband Wireless Internet(Multiple Responses, %)]





• VI. The Outlook for Wireless Internet Usage

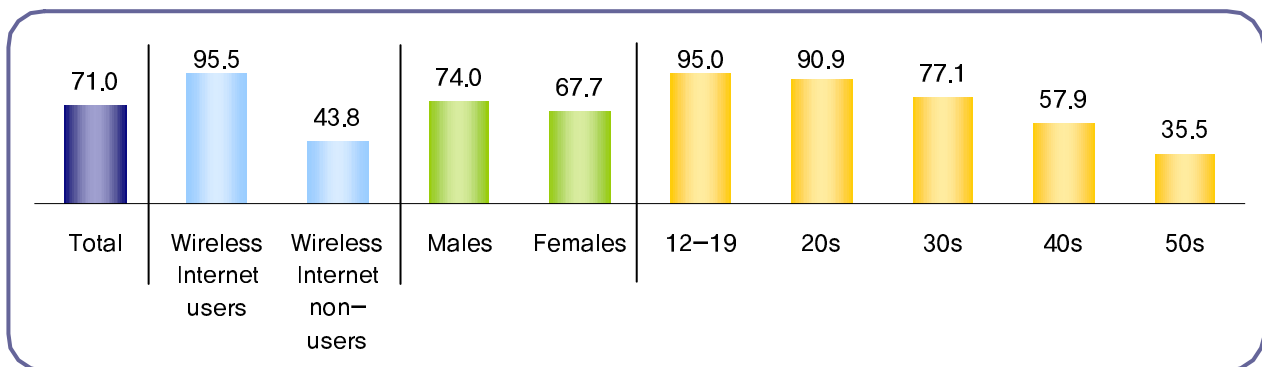
1. Future Intention to Use Wireless Internet



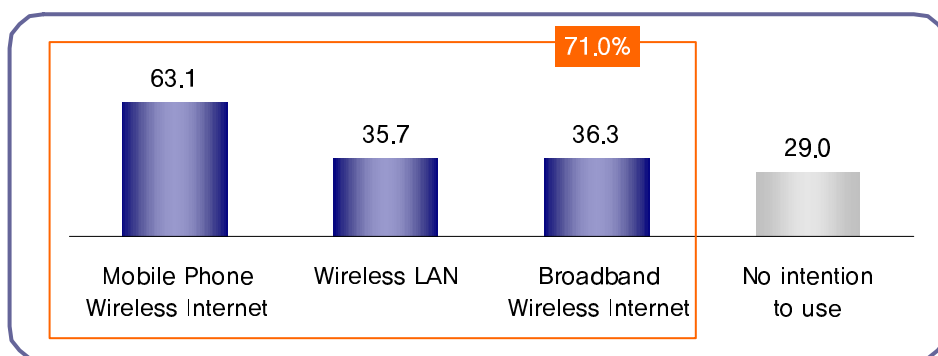
Almost all(95.5%) of the wireless Internet users intend to continue their use of wireless Internet

- ▶ 71.0%(95.5% of the wireless Internet users and 43.8% of non-users) of the population ages 12–59 express their intention to use the wireless Internet in the future.
- ▶ By service type, 63.1% say that they intend to use mobile phone wireless Internet, while 35.7% and 36.3% are found to have an intention to use wireless LAN and Broadband wireless Internet, respectively.
- ▶ Meanwhile, among the devices that the respondents express their intention to use in the future, 'Mobile phone' ranks highest at 92.7%, followed by 'Notebook PC(65.4%)', and 'PDA phone, Smart phone(44.0%)'.

[Fig 25. Future Intention to Use Wireless Internet(%)]

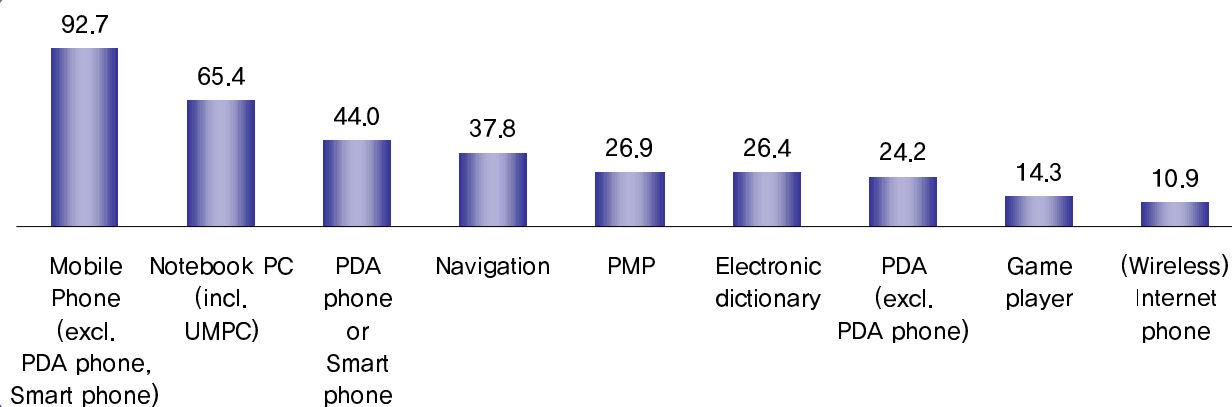


[Fig 26. Future Intention to Use Wireless Internet by Service Type(Multiple Responses, %)]





[Fig 27. Future Intention to Use Wireless Device(Multiple Responses, %)]





Appendix. Wireless Internet Usage of the Young Ages 12–29 via 2G and 3G Mobile Phone

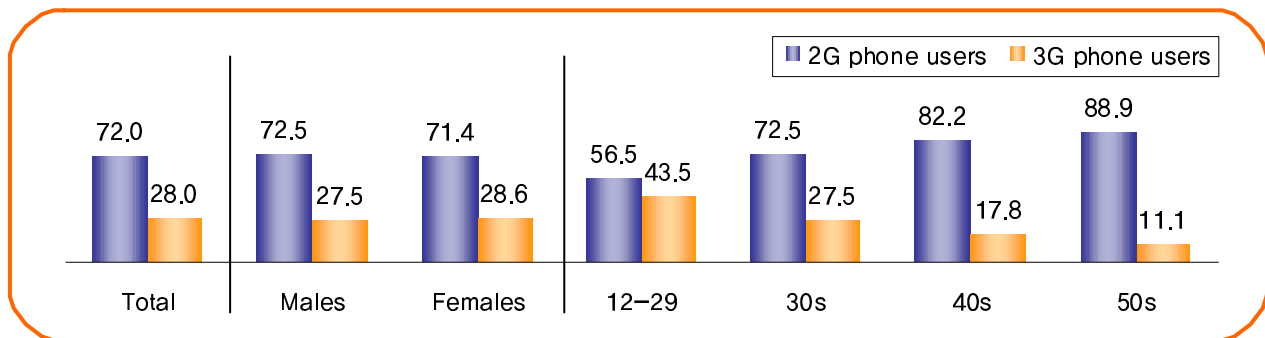
1. Mobile Phone Usage



43.5% of mobile phone users ages 12–19 are 3G(third generation) phone users

- ▶ 72.0% of mobile phone users ages 12–59 are 2G phone users, while 28.0% use 3G phones.
- ▶ Little difference is shown in 3G phone usage rate between females and males(28.6% vs. 27.5%), while almost half(43.5%) of those ages 12–29 are found to use 3G phones.

[Fig 1. Mobile Phone Usage(%)-Mobile Phone Users Ages 12–29]



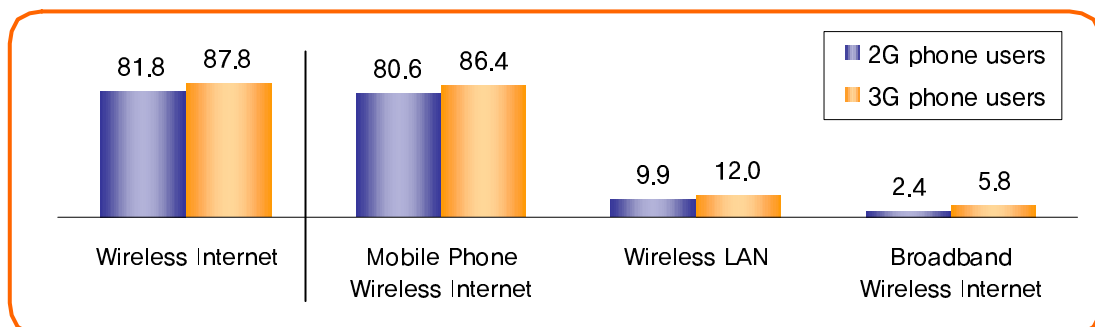
2. Wireless Internet Usage



The wireless Internet usage of 3G phone users is higher by 6.0%p

- ▶ The wireless Internet usage rate of 3G phone users is 87.8%, higher by 6.0%p than 81.8% of 2G phone users.
- ▶ By phone type, 3G phone users(86.4%) use mobile phone wireless Internet more than 2G phone users(80.6%) by 5.8%p, while 3G phone users show higher usage rate in both wireless LAN and Broadband wireless Internet(2.1%p, and 3.4%p, respectively).

[Fig 2. Wireless Internet Usage Rate(%)-Mobile Phone Users Ages 12–29]





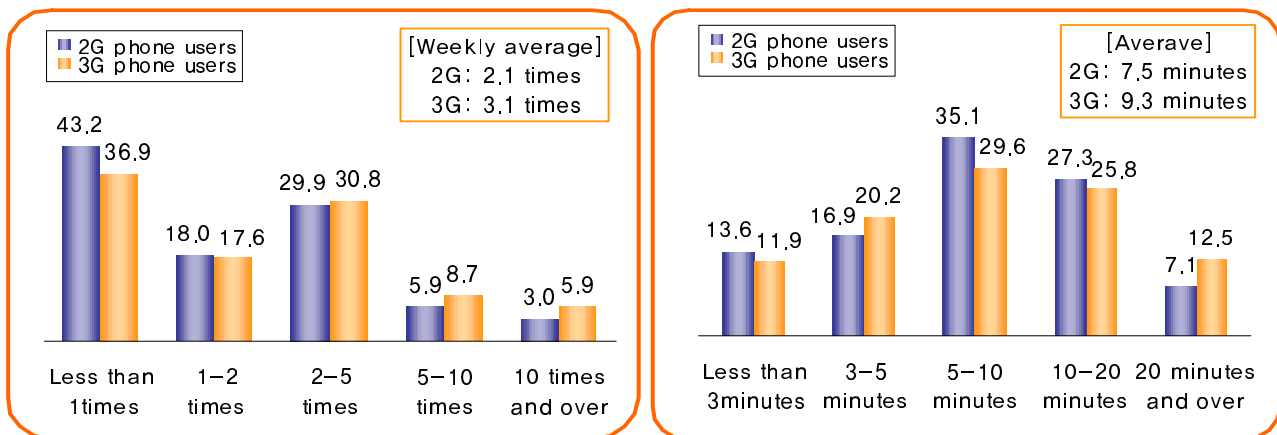
3. Mobile Phone Wireless Internet Usage Frequency/Hours



3G phone users access the wireless Internet for an average of 3.1 times a week, and spend an average of 9.3 minutes per access.

- ▶ 3G phone users access the wireless Internet an average of 3.1 times a week, and spend an average of 9.3 minutes per access. This result shows that 3G phone users are found to use the mobile phone wireless Internet more actively than 2G phone users (Weekly average of 2.1 times, an average of 7.5 minutes per access).

[Fig 3. Frequency and Hours of Mobile Phone Wireless Internet Usage(%)-Mobile Phone Users Ages 12-29]



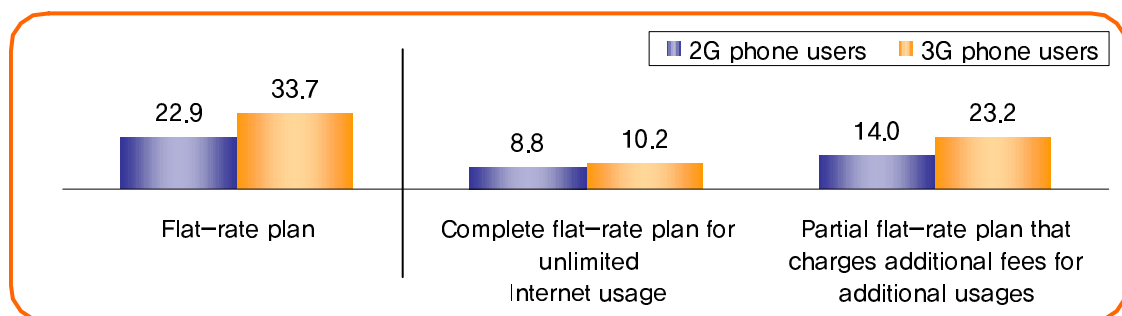
4. Usage of Flat-Rate Plan for Mobile Phone Wireless Internet



33.7% of the 3G phone users use a flat-rate plan for wireless Internet

- ▶ 33.7% of the 3G phone users, 10.8%p larger than 22.9% of 2G users, are found to subscribe to and use a flat-rate plan for wireless Internet.
- ▶ Both the 2G and the 3G phone users are also found to use 'Complete flat-rate plan(8.8% and 10.2%, respectively)', slightly more than 'Partial flat-rate plan(14.0% and 23.2%)'.

[Fig 4. Usage of Flat-Rate Plan for Mobile Phone Wireless Internet(%)-Mobile Phone Users Ages 12-29]





5. Mobile Phone Wireless Internet Service Usage



The usage of 'Mobile game' via 3G phone is higher than 2G phone by 9.5%P.

- ▶ 3G phone users, compared to 2G phone users, are found to use more wireless Internet services via their mobile phones.

[Fig 5. Mobile Phone Wireless Internet Service Usage(%)-Mobile Phone Users Ages 12-29]

