HOUSING & DEVELOPMENT BOARD

# Public Housing in Singapore: Residents' Profile, Housing Satisfaction and Preferences

## HDB Sample Household Survey 2023/24

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HDB Hub
480 Lorong 6 Toa Payoh
Singapore 310480

**Research Team**

Goh Li Ping (Project Lead)
William Lim Teong Wee
Tan Hui Fang
Koh Sok San
Clara Wong Lee Hua
Lim E-Farn
Hui Yean Yean
Fiona Lee Yiling
Sangeetha D/O Panearselvan
Esther Chua Jia Ping
Amy Wong Jin Ying
Wendy Li Xin
Muhammad Khalis Shari
Maureen Ngo Mei Qing
Joy Ang Kai Xin
Brandon Chua Shaojie
Tulip Ong Yu Lay
Tan Yong Sheng

| | |
|---|---|
| Advisor: | Miss Kee Lay Cheng |
| Research Advisory Panel: | Associate Professor Tan Ern Ser (Chairperson)<br>Associate Professor Kang Soon Hock<br>Associate Professor Nicholas Hon Hsueh Hsien<br>Associate Professor Vincent Chua<br>Dr Chua Tin Chiu<br>Associate Professor Kelvin Seah Kah Cheng<br>Professorial Research Fellow Harvey Neo |

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# PUBLIC HOUSING IN SINGAPORE: Residents' Profile, Housing Satisfaction and Preferences

## HDB Sample Household Survey 2023/24

# FOREWORD

For 65 years, HDB has been more than just a provider of public housing – we have been creators of homes and communities that shape the very fabric of Singapore. Our mission has always been clear: to build not just affordable and quality homes, but to create vibrant, sustainable and liveable towns where our residents and communities can thrive.

The Sample Household Survey (SHS) 2023/24 marks a significant milestone in our journey of understanding and serving our residents better. This 12th edition covers 7,023 households and 1,661 singles (occupiers) across Singapore. Continuing a tradition that began in 1968, the SHS serves as our compass, guiding us in our building and upgrading programmes, housing policy reviews and community engagement efforts, to meet the evolving needs and aspirations of Singaporeans.

As society progresses, and demography shifts, residents' housing needs and expectations will also change. Residents seek not just quality homes, but spaces that nurture community bonds and enhance their overall well-being. Our latest survey delved into various aspects of HDB living – from flat designs and accessibility to the strength of community ties. We also explored contemporary trends like residents' mental well-being and their preference to age-in-place.

I am pleased to share that the SHS 2023/24 findings continued to show high satisfaction with HDB living environments. This validates our approach, while highlighting the crucial link between physical spaces and social bonds. The insights gained have reinforced our commitment to strengthen social resilience, particularly among vulnerable households, and to prioritise residents' health and wellness in planning, design and development of our public housing estates.

These findings are detailed in two comprehensive monographs:

i) **Public Housing in Singapore: Residents' Profile, Housing Satisfaction and Preferences**

ii) **Public Housing in Singapore: Social Well-Being of HDB Communities and Well-Being of Seniors and Singles (Occupiers)**

To every resident who participated in this survey – thank you. Your candid feedback is invaluable in helping us design better homes, provide convenient and accessible amenities, create meaningful and enjoyable communal spaces, and develop strategies that deepen your sense of belonging. As we look to the future, we remain committed to building not just flats, but homes where communities flourish and memories are made.

Tan Meng Dui
Chief Executive Officer
Housing & Development Board

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# Key Indicators

## NOTES

1) Unless otherwise stated, data on demographic characteristics of HDB resident population are provided by Department of Statistics (DOS), compiled based on administrative sources and as at June of the reference year.

2) Data on economic characteristics of HDB resident population are provided by Manpower Research and Statistics Department (MRSD) of Ministry of Manpower (MOM), based on Comprehensive Labour Force Survey of the reference year.

3) Data on demographic characteristics of HDB households are compiled based on results from Sample Household Survey of the reference year.

4) Survey estimates are subject to sampling variation.

5) Figures may not add up to the totals due to rounding.

## Key Indicators of HDB Resident Population by Flat Type (2013, 2018 & 2023)

| | | Total | | | 1- & 2-Room | | | 3-Room | | | 4-Room | | | 5-Room & Bigger | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013* | 2018 | 2023 | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 |
| **Demographic Characteristics** | | | | | | | | | | | | | | | | |
| Resident Population | | | | | | | | | | | | | | | | |
| Persons | ('000) | 3,148 | 3,149 | 3,182 | 143 | 171 | 190 | 612 | 585 | 561 | 1,304 | 1,331 | 1,355 | 1,081 | 1,062 | 1,076 |
| | (%) | 100.0 | 100.0 | 100.0 | 4.6 | 5.4 | 6.0 | 19.4 | 18.6 | 17.6 | 41.4 | 42.3 | 42.6 | 34.4 | 33.7 | 33.8 |
| Sex | (%) | | | | | | | | | | | | | | | |
| Male | | 49.4 | 49.1 | 48.8 | 52.4 | 51.9 | 51.5 | 48.3 | 47.7 | 47.0 | 49.5 | 49.2 | 48.9 | 49.5 | 49.3 | 49.2 |
| Female | | 50.6 | 50.9 | 51.2 | 47.6 | 48.1 | 48.5 | 51.7 | 52.3 | 53.0 | 50.5 | 50.8 | 51.1 | 50.5 | 50.7 | 50.8 |
| Mean Age | (Years) | 38.5 | 40.7 | 42.7 | 43.7 | 45.8 | 48.2 | 42.6 | 44.9 | 47.6 | 37.8 | 39.6 | 41.5 | 36.3 | 38.8 | 40.7 |
| Median Age | (Years) | 38.6 | 40.8 | 42.8 | 46.9 | 50.4 | 53.2 | 43.6 | 46.4 | 49.6 | 37.3 | 39.0 | 40.9 | 36.6 | 38.9 | 40.5 |
| Age Group | (%) | | | | | | | | | | | | | | | |
| Below 15 Years | | 15.8 | 14.3 | 13.3 | 15.2 | 13.6 | 12.2 | 12.3 | 11.1 | 9.2 | 15.7 | 14.9 | 14.2 | 18.2 | 15.5 | 14.6 |
| 15-54 Years | | 60.5 | 56.8 | 53.5 | 48.1 | 43.4 | 40.1 | 57.0 | 52.6 | 49.0 | 62.2 | 58.4 | 55.5 | 62.1 | 59.2 | 55.9 |
| 55–64 Years | | 13.2 | 14.9 | 14.9 | 16.4 | 18.5 | 17.6 | 15.5 | 16.7 | 17.1 | 12.9 | 14.3 | 14.1 | 11.9 | 14.2 | 14.5 |
| 65 Years & Above | | 10.4 | 14.0 | 18.2 | 20.3 | 24.4 | 30.0 | 15.2 | 19.6 | 24.7 | 9.2 | 12.5 | 16.3 | 7.8 | 11.2 | 15.1 |
| Ethnic Group | (%) | | | | | | | | | | | | | | | |
| Chinese | | 72.3 | 71.8 | 71.2 | 51.4 | 48.6 | 49.6 | 71.8 | 70.8 | 70.3 | 72.8 | 72.8 | 72.7 | 74.8 | 74.9 | 73.6 |
| Malay | | 15.8 | 16.4 | 16.9 | 35.0 | 37.9 | 37.4 | 15.8 | 16.8 | 17.3 | 15.8 | 15.9 | 16.0 | 13.3 | 13.2 | 14.1 |
| Indian | | 9.2 | 9.2 | 9.1 | 11.8 | 11.5 | 10.6 | 9.7 | 9.6 | 9.4 | 8.9 | 8.7 | 8.6 | 9.0 | 9.2 | 9.4 |
| Others | | 2.7 | 2.6 | 2.8 | 1.8 | 2.0 | 2.4 | 2.7 | 2.8 | 3.1 | 2.5 | 2.5 | 2.7 | 2.9 | 2.8 | 2.9 |

*Source: DOS*

* *Including residents living in non-privatised Housing and Urban Development Company (HUDC) flats*

## Key Indicators of HDB Resident Population by Flat Type (2013, 2018 & 2023) *(cont'd)*

| | | Total | | | 1- & 2-Room | | | 3-Room | | | 4-Room | | | 5-Room & Bigger | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** |
| **Economic Characteristics** | | | | | | | | | | | | | | | | |
| Persons Aged 15 Years & Above | ('000) | 2,613 | 2,723 | 2,777 | 111 | 131 | 161 | 512 | 514 | 511 | 1,102 | 1,154 | 1,175 | 888 | 925 | 930 |
| Sex | (%) | | | | | | | | | | | | | | | |
| Male | | 48.7 | 48.5 | 48.3 | 49.1 | 49.6 | 50.5 | 47.4 | 46.8 | 46.4 | 49.1 | 48.8 | 48.3 | 49.0 | 48.9 | 48.9 |
| Female | | 51.3 | 51.5 | 51.7 | 50.9 | 50.4 | 49.5 | 52.6 | 53.2 | 53.6 | 50.9 | 51.2 | 51.7 | 51.0 | 51.1 | 51.1 |
| Labour Force | ('000) | 1,749 | 1,833 | 1,894 | 62 | 73 | 92 | 338 | 331 | 333 | 747 | 797 | 833 | 603 | 633 | 636 |
| Employed | | 1,678 | 1,758 | 1,826 | 57 | 66 | 87 | 323 | 316 | 318 | 717 | 768 | 806 | 581 | 607 | 615 |
| Unemployed | | 71 | 75 | 68 | 5 | 6 | 6 | 14 | 15 | 14 | 30 | 28 | 26 | 22 | 26 | 22 |
| Labour Force Participation Rate (LFPR) | (%) | 66.9 | 67.3 | 68.2 | 55.7 | 55.5 | 57.4 | 65.9 | 64.5 | 65.1 | 67.8 | 69.0 | 70.8 | 67.9 | 68.4 | 68.4 |
| Male LFPR | | 76.0 | 75.3 | 74.8 | 65.6 | 63.0 | 65.2 | 75.6 | 73.0 | 72.7 | 77.0 | 77.5 | 77.2 | 76.1 | 75.6 | 74.6 |
| Female LFPR | | 58.4 | 59.8 | 62.0 | 46.2 | 48.1 | 49.5 | 57.2 | 57.0 | 58.5 | 58.9 | 61.0 | 64.9 | 60.0 | 61.4 | 62.6 |

*Source: MRSD, MOM*

## Key Indicators of HDB Households by Ethnic Group (2013, 2018 & 2023)

| | | Total | | | Chinese | | | Malay | | | Indian | | | Others | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Demographic Characteristics** | | | | | | | | | | | | | | | | |
| Total Number of Households | | 908,499 | 1,013,542 | 1,099,742 | 702,366 | 773,953 | 834,633 | 113,489 | 132,029 | 154,608 | 78,759 | 88,151 | 92,788 | 13,885 | 19,409 | 17,714 |
| Type of Family Nucleus | (%) | | | | | | | | | | | | | | | |
| Nuclear Family | | 76.3 | 75.6 | 72.2 | 76.6 | 74.9 | 71.0 | 72.5 | 75.7 | 74.0 | 79.7 | 82.6 | 76.3 | 80.8 | 70.9 | 87.3 |
| Extended Nuclear Family | | 8.3 | 6.4 | 5.7 | 7.9 | 6.0 | 5.7 | 10.6 | 8.9 | 7.2 | 8.3 | 4.2 | 4.2 | 7.5 | 15.6 | -* |
| Multi-Nuclear Family | | 6.2 | 4.6 | 5.2 | 5.4 | 4.0 | 4.3 | 11.2 | 7.8 | 8.7 | 6.1 | 5.3 | 7.9 | 6.4 | -* | -* |
| Non-Family Based Households | | 9.2 | 13.5 | 17.0 | 10.1 | 15.1 | 19.0 | 5.7 | 7.5 | 10.1 | 5.9 | 7.9 | 11.7 | 5.3 | 11.4 | 8.5 |
| Household Size | (%) | | | | | | | | | | | | | | | |
| 1 Person | | 8.4 | 12.6 | 15.6 | 9.3 | 14.3 | 17.4 | 5.3 | 6.8 | 9.3 | 5.0 | 6.9 | 11.5 | 4.8 | 9.1 | 6.4 |
| 2 Persons | | 20.4 | 25.7 | 27.3 | 22.1 | 27.0 | 28.3 | 12.0 | 21.6 | 24.5 | 18.4 | 22.0 | 24.7 | 16.1 | 18.5 | 19.7 |
| 3 Persons | | 23.6 | 23.0 | 22.6 | 24.7 | 24.0 | 23.1 | 18.4 | 18.3 | 20.2 | 21.8 | 21.8 | 20.7 | 25.2 | 21.4 | 29.6 |
| 4 Persons | | 26.7 | 23.6 | 20.6 | 26.9 | 22.6 | 20.2 | 20.4 | 22.2 | 19.5 | 33.4 | 33.8 | 26.2 | 30.7 | 27.2 | 22.8 |
| 5 Persons | | 13.5 | 10.0 | 9.2 | 12.1 | 8.7 | 8.0 | 21.7 | 16.4 | 14.1 | 13.6 | 9.8 | 11.2 | 13.6 | 19.8 | 12.2 |
| 6 or More Persons | | 7.4 | 5.0 | 4.8 | 4.9 | 3.4 | 3.2 | 22.2 | 14.6 | 12.4 | 7.8 | 5.6 | 5.8 | 9.6 | 4.0 | 9.3 |
| Mean Household Size | (Persons) | 3.4 | 3.1 | 3.0 | 3.3 | 3.0 | 2.8 | 4.2 | 3.7 | 3.5 | 3.6 | 3.4 | 3.2 | 3.7 | 3.4 | 3.4 |
| Median Household Size | (Persons) | 2.9 | 2.5 | 2.3 | 2.8 | 2.4 | 2.0 | 3.7 | 3.1 | 3.0 | 3.1 | 3.0 | 3.0 | 3.1 | 3.0 | 3.0 |
| Flat Type | (%) | | | | | | | | | | | | | | | |
| Rental | | 5.4 | 5.0 | 4.9 | 4.2 | 3.6 | 3.4 | 11.7 | 11.9 | 12.2 | 7.3 | 6.8 | 7.0 | 5.0 | 2.5 | 4.8 |
| 1- & 2-Room | | 1.1 | 2.4 | 4.1 | 1.1 | 2.3 | 4.1 | 1.2 | 3.2 | 4.7 | 0.8 | 2.3 | 3.2 | 1.0 | 1.0 | -* |
| 3-Room | | 23.8 | 22.9 | 22.1 | 24.2 | 23.0 | 22.4 | 22.5 | 22.3 | 21.6 | 22.6 | 23.4 | 20.7 | 19.9 | 20.7 | 20.6 |
| 4-Room | | 39.0 | 40.0 | 40.1 | 39.1 | 40.6 | 40.8 | 38.9 | 38.2 | 38.0 | 38.3 | 38.0 | 38.2 | 38.7 | 37.2 | 38.7 |
| 5-Room & Bigger | | 30.7 | 29.7 | 28.8 | 31.4 | 30.4 | 29.4 | 25.8 | 24.4 | 23.5 | 31.0 | 29.6 | 30.9 | 35.4 | 38.5 | 33.5 |

** Values with high coefficient of variation (CV) were dropped*

## Key Indicators of HDB Households by Flat Type (2013, 2018 & 2023)

| | Total | | | Rental | | | 1- & 2-Room | | | 3-Room | | | 4-Room | | | 5-Room & Bigger | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Demographic Characteristics** | | | | | | | | | | | | | | | | | | |
| Total Number of Households | 908,499 | 1,013,542 | 1,099,742 | 49,162 | 50,345 | 54,168 | 9,662 | 24,674 | 44,693 | 216,163 | 232,351 | 243,054 | 354,526 | 405,163 | 441,425 | 279,033 | 301,308 | 316,402 |
| Ethnic Group (%) | | | | | | | | | | | | | | | | | | |
| Chinese | 77.3 | 76.4 | 75.9 | 59.9 | 55.9 | 51.7 | 78.0 | 73.6 | 76.0 | 78.7 | 76.7 | 76.9 | 77.5 | 77.5 | 77.1 | 79.0 | 78.2 | 77.6 |
| Malay | 12.5 | 13.0 | 14.1 | 26.9 | 31.3 | 34.8 | 14.2 | 17.3 | 16.3 | 11.8 | 12.7 | 13.7 | 12.4 | 12.4 | 13.3 | 10.5 | 10.7 | 11.5 |
| Indian | 8.7 | 8.7 | 8.4 | 11.8 | 11.8 | 11.9 | 6.4 | 8.3 | 6.6 | 8.2 | 8.9 | 7.9 | 8.5 | 8.3 | 8.0 | 8.8 | 8.6 | 9.1 |
| Others | 1.5 | 1.9 | 1.6 | 1.4 | 1.0 | -* | 1.4 | 0.8 | -* | 1.3 | 1.7 | 1.5 | 1.5 | 1.8 | 1.6 | 1.8 | 2.5 | 1.9 |
| Type of Family Nucleus (%) | | | | | | | | | | | | | | | | | | |
| Nuclear Family | 76.3 | 75.6 | 72.2 | 63.1 | 60.4 | 56.1 | 56.1 | 57.6 | 39.4 | 69.9 | 66.9 | 61.4 | 79.5 | 78.3 | 78.9 | 80.5 | 82.7 | 78.4 |
| Extended Nuclear Family | 8.3 | 6.4 | 5.7 | 3.7 | 4.1 | 1.5 | -* | 1.6 | 1.5 | 6.0 | 4.2 | 4.1 | 9.5 | 7.7 | 5.6 | 9.4 | 7.1 | 8.5 |
| Multi-Nuclear Family | 6.2 | 4.6 | 5.2 | -* | 0.7 | -* | -* | -* | -* | 4.0 | 3.0 | 2.8 | 6.7 | 5.0 | 5.8 | 8.1 | 6.1 | 7.5 |
| Non-Family Based Households | 9.2 | 13.5 | 17.0 | 31.6 | 34.8 | 41.6 | 39.4 | 39.4 | 58.0 | 20.1 | 25.9 | 31.7 | 4.3 | 8.9 | 9.8 | 2.0 | 4.2 | 5.7 |
| Household Size (%) | | | | | | | | | | | | | | | | | | |
| 1 Person | 8.4 | 12.6 | 15.6 | 23.6 | 26.8 | 36.4 | 37.9 | 38.8 | 55.2 | 19.2 | 24.8 | 29.9 | 3.9 | 8.7 | 8.9 | 2.0 | 3.9 | 4.7 |
| 2 Persons | 20.4 | 25.7 | 27.3 | 41.7 | 39.8 | 32.6 | 33.0 | 37.3 | 32.9 | 27.8 | 32.0 | 31.8 | 18.3 | 23.5 | 28.0 | 13.1 | 20.4 | 21.1 |
| 3 Persons | 23.6 | 23.0 | 22.6 | 20.0 | 15.8 | 14.0 | 15.9 | 13.5 | 7.4 | 23.6 | 21.7 | 20.5 | 25.4 | 24.7 | 26.1 | 22.3 | 23.8 | 22.9 |
| 4 Persons | 26.7 | 23.6 | 20.6 | 8.4 | 9.9 | 7.4 | -* | 6.1 | 3.0 | 18.8 | 13.8 | 10.9 | 29.2 | 27.3 | 23.4 | 33.6 | 30.0 | 29.1 |
| 5 Persons | 13.5 | 10.0 | 9.2 | 3.4 | 4.9 | 5.5 | -* | 2.2 | 1.5 | 6.9 | 4.7 | 5.0 | 14.9 | 10.9 | 9.5 | 18.9 | 14.4 | 13.6 |
| 6 or More Persons | 7.4 | 5.0 | 4.8 | 2.9 | 2.8 | 4.1 | -* | 2.1 | -* | 3.8 | 2.9 | 1.9 | 8.3 | 4.9 | 4.2 | 10.0 | 7.6 | 8.7 |
| Mean Household Size (Persons) | 3.4 | 3.1 | 3.0 | 2.4 | 2.4 | 2.3 | 2.2 | 2.0 | 1.6 | 2.8 | 2.5 | 2.4 | 3.6 | 3.3 | 3.1 | 3.9 | 3.6 | 3.6 |
| Median Household Size (Persons) | 2.9 | 2.5 | 2.3 | 1.6 | 1.6 | 1.4 | 1.4 | 1.3 | 1.0 | 2.1 | 1.8 | 1.6 | 3.1 | 2.7 | 2.5 | 3.4 | 3.1 | 3.0 |

** Values with high coefficient of variation (CV) were dropped*

# Glossary of Terms and Definitions

# Glossary of Terms and Definitions

## *Resident Population*

***Resident population*** *comprises Singapore citizens and permanent residents. Singapore permanent residents refer to non-citizens who have been granted permanent residence in Singapore.*

***HDB resident population*** *refers to Singapore citizens and permanent residents residing in HDB flats.*

## *Highest Education Level Attained*

*Highest qualification attained refers to the highest grade or standard a person has passed or the highest level where a certificate, diploma, or degree is awarded. The Singapore Standard Educational Classification (SSEC) 2020 is used to classify persons by highest qualification attained. Persons aged 15 years and above who are not attending educational institutions as full-time students are classified into the following main categories:*

*(i)* ***Below Secondary*** *includes persons with no qualification (i.e., those who have never attended school, have primary education but without Primary School Leaving Examination certificate (PSLE), Certificate in Basic Education for Skills Training (BEST) 1-3 or their equivalent), primary education (i.e., those who have PSLE, Certificate in BEST 4 or at least 3 Employability Skills Systems (ESS) Workplace Literacy and Numeracy (WLPN) Statements of Attainment at Level 1 or 2 or equivalent standard) or lower secondary education (i.e., those who have secondary education without a General Certificate of Education (GCE) Normal ('N')/Ordinary ('O') Level pass, Certificate in Worker Improvement through Secondary Education (WISE) 1-3, basic vocational certificates, at least 3 ESS WPLN Statements of Attainment at Level 3 or 4, or equivalent).*

*(ii)* ***Secondary/Post-secondary*** *includes persons with secondary education (i.e., those who have at least 1 GCE 'N'/'O' Level pass, National ITE Certificate (Intermediate), ITE Skills Certificate (ISC), or at least 3 ESS WPLN Statements of Attainment at Level 5 and above); or post-secondary (non-tertiary) education (i.e., those who have at least 1 GCE Advanced*

*(‘A’)/Higher 2 (‘H2’) Level pass, Nitec/Higher Nitec/Master Nitec, Workforce Skills Qualifications (WSQ) Certificate/Higher Certificate/Advanced Certificate, International Baccalaureate/High school diploma, or other certificates/qualifications of equivalent standard).*

*(iii)* ***Diploma and Professional Qualification*** *includes persons who have polytechnic diplomas, advanced diplomas or post-diploma certificates; as well as persons who have qualifications awarded by professional bodies, or NIE diploma, ITE diploma and other diploma qualifications (e.g., SIM diploma, LASALLE diploma, NAFA diploma, WSQ diploma/specialist diploma).*

*(iv)* ***Degree*** *includes persons who have bachelor’s degree, or postgraduate diploma (including NIE postgraduate diploma), or master’s degree, or doctorate. It also includes persons with WSQ graduate certificate/graduate diploma.*

## *Labour Force Status*

***Labour force*** *refers to persons aged 15 years and above who were either employed (i.e., working) or unemployed (i.e., actively looking for a job and available for work) during the reference period.*

***Employed persons*** *refer to persons aged 15 years and above who, during the reference period:*

*(i)* *worked for one hour or more either for pay or profit; or*

*(ii)* *have a job or business to return to but were temporarily absent because of illness, injury, breakdown of machinery at workplace, labour management dispute or other reasons.*

*Members of the Singapore Armed Forces including full-time National Servicemen were included in the persons employed, unless otherwise specified.*

***Unemployed persons*** *refer to persons aged 15 years and above who were not working but were actively looking for a job and available for work during the reference period. They include persons who are not working but are taking steps to start their own business or taking up a new job after the reference period.*

***Outside the labour force*** *refers to persons who are neither working nor unemployed during the reference period. They also include persons before schooling-age, full-time students, homemakers, retirees, etc.*

***Labour force participation rate*** *is defined as the percentage of the labour force to the population.*

## *Tenure*

*Tenure of an HDB dwelling unit refers to the status of the property, which can either be sold or rental. The unit is with respect to the dwelling in which the household members live.*

***Rental*** *refers to property units designated as subsidised HDB rental flats.*

***Sold*** *refers to property units designated for sales. This includes households renting from HDB homeowners.*

## *Role*

*Role describes the involvement of an HDB resident in his/her dealings with HDB. HDB residents are classified into the following four main categories:*

- ***Owner/Co-owner*** *refers to persons who have ownership rights to a purchased HDB flat (i.e., sold flat) and must be Singapore citizens or permanent residents who meet HDB's eligibility conditions.*
- ***Registered Tenant*** *refers to persons who are officially on the Tenancy Agreement with HDB to stay in the Public Rental flat and must meet HDB's eligibility criteria for Public Rental Scheme.*
- ***Open-market Tenant*** *refers to persons who rent HDB rooms or entire flat from open market and whose particulars have been submitted to HDB by the flat owners.*
- ***Occupier*** *refers to persons other than those stated above, i.e., not owner or co-owner of an HDB sold flat, not registered tenant of an HDB rental flat and not an open-market tenant.*

## Households

*A **household** is defined as an entire group of persons, who may or may not be related, living together in a housing unit. There may also be one-person households, where a person lives alone in a single housing unit. The household is equated with the housing unit and there is usually one household per housing unit. Foreign domestic workers or room tenants dwelling in the same housing unit as the owner/co-owner(s) or registered tenant do not constitute part of the household. This definition is often known as the household-dwelling unit concept.*

## Type of Family Nucleus

***Family-based households** refer to nuclear, extended nuclear and multi-nuclear families.*

***Nuclear family** refers to:*

*(i)* *a married couple with or without children; or*

*(ii)* *a family consisting of immediate related members, without the presence of a married couple, e.g., one parent only with their unmarried child(ren).*

***Extended nuclear family** comprises a nuclear family with one or more relatives who, by themselves, do not form a nuclear family.*

***Multi-nuclear family** refers to a family comprising two or more nuclear families.*

***Non-family based households** refer to:*

*(i)* *one-person households (i.e., a person living alone regardless of marital status); or*

*(ii)* *unrelated or distantly related persons staying together.*

## Number of Generations in Family-Based Household

***One generation** refers to households where family members are from the same generation, such as a married couple or siblings living together.*

***Two generations** refers to households where family members are from two different generations, such as parents and children, or grandparents and grandchildren living together.*

***Three or more generations*** *refers to households where family members are from three or more different generations, such as grandparents, parents and children all living together.*

*Note: Number of generations is not considered for non-family based households.*

## *Resident Life Cycle Stage*

*For resident life cycle stage, the respondent is used as the reference point:*

*A* ***family without children*** *refers to a couple without children.*

*A* ***family with young children*** *refers to a family in which the eldest child is aged 12 years and below.*

*A* ***family with teenaged children*** *refers to a family in which the eldest child is aged between 13 and 20 years.*

*A* ***family with unmarried grown-up children*** *refers to a family in which the eldest unmarried child is aged 21 years and above.*

*A* ***family with married children*** *refers to a family with at least one married child.*

***Non-family*** *refers to a single person, a divorced/separated or widowed person without children.*

## *Household Life Cycle Stage*

*For household life cycle stage, the oldest member living in the household is used as the reference point:*

*A* ***family with young children*** *refers to a family in which the eldest child is aged 12 years and below.*

*A* ***family with teenaged children*** *refers to a family in which the eldest child is aged between 13 and 20 years.*

*A* ***family with unmarried grown-up children*** *refers to a family in which the eldest unmarried child is aged 21 years and above.*

*A* ***family without children*** *refers to a married couple who are aged below 55 years.*

*A* ***young senior couple living alone*** *refers to a married couple with at least one spouse aged 55 to 64 years.*

*A **senior couple living alone** refers to a married couple with at least one spouse aged 65 years and above.*

*A **non-family household** refers to:*

*(i) a one-person household (i.e., a person living alone regardless of marital status); or*

*(ii) unrelated, siblings or distantly related persons living together.*

## Category of Towns

*Towns/Estates are grouped based on average age of blocks in the respective town/estate. The age of block is computed based on number of years from when the block was handed over as at June 2023.*

***< 20 Years** includes towns that were developed in the 1990s, where development may be ongoing.*

***20 - 30 Years** includes towns where the average age of blocks was between 20 and 30 years.*

***> 30 Years** includes towns and estates where the average age of blocks was above 30 years.*

Towns and Estates by Category

| < 20 Years | 20 – 30 Years | > 30 Years |
|---|---|---|
| 1. Punggol | 1. Bukit Batok | 1. Ang Mo Kio |
| 2. Sembawang | 2. Bukit Panjang | 2. Bedok |
| 3. Sengkang | 3. Choa Chu Kang | 3. Bishan |
| | 4. Hougang | 4. Bukit Merah |
| | 5. Jurong West | 5. Bukit Timah |
| | 6. Pasir Ris | 6. Central Area* |
| | 7. Tampines | 7. Clementi |
| | 8. Woodlands | 8. Geylang |
| | 9. Yishun | 9. Jurong East |
| | | 10. Kallang/Whampoa |
| | | 11. Marine Parade |
| | | 12. Queenstown |
| | | 13. Serangoon |
| | | 14. Toa Payoh |

** Covering areas such as Tanjong Pagar Plaza, Cantonment Road, Jalan Kukoh, Chin Swee Road, York Hill, Upper Cross Street, Chinatown Complex, Selegie Road*

# 1

# Introduction

*Chapter 1*

# Introduction

## 1.1 Background

HDB has conducted Sample Household Surveys (SHSes) of residents living in HDB flats since 1968, at intervals of five years. SHS 2023/24 is the 12th survey in the series. It covers a comprehensive range of topics and is an in-depth survey of both physical and social aspects of public housing in Singapore. These large-scale surveys with their historical continuity have facilitated trend analysis over time, even as the research coverage of the SHS changes in tandem with the evolving roles and mission of HDB. In this SHS, the focus continues to be on the HDB lived experience, ageing-in-place, social diversity and community cohesion/resilience.

Through the various stages of the study, the research team has consulted the HDB Research Advisory Panel (RAP), which was formed in 2008. The panel, chaired by Associate Professor Tan Ern Ser, comprises academics in sociology, psychology, geography, economics and statistics. Its main role is to provide advice on research projects and socio-economic studies undertaken by HDB. The panel has, as in previous series, contributed to SHS 2023/24 by providing valuable inputs from research design, questionnaire construction, sampling, data analysis to report writing.

With regard to the specific scope and contents of the study, the research team has consulted with various government agencies and Groups in HDB. The latter's inputs were sought on the type of data and findings that could contribute to HDB's policy reviews as well as identify any aspects of HDB planning, policy and operations which could be enhanced or improved.

## 1.2 Objectives

The two key objectives of the SHS are as follows:

a) Obtain demographic and socio-economic profile of residents and identify changing needs and expectations. This information is useful in the assessment of HDB's policies and operations; and

b) Monitor residents' level of satisfaction with various aspects of public housing and identify areas pertaining to the physical and social environment in HDB towns that could be enhanced or improved.

Since SHS 2003, the coverage of the survey has been expanded to include the collection of data and feedback on the needs of residents living in various towns.

## 1.3 Sampling Design

The target population comprised households living in HDB sold and rental flats occupied by Singapore citizens and permanent residents as at June 2023. Each household occupying an HDB dwelling unit forms a sampling unit.

A total of 7,023 households and 1,661 single occupiers were successfully interviewed, yielding a margin of error of ±6.0% at 95% confidence level for each town/estate. Non-response and post-stratification adjustments were applied to the final sampling weights to reduce sampling errors and render the sample more representative of the target population.

A multi-modal data collection method was used, predominantly through online surveys and face-to-face interviews as well as telephone surveys. Fieldwork was carried out by Media Research Consultants (MRC) Pte Ltd from October 2023 to April 2024.

## 1.4 Outline of Monograph

This monograph will present two parts of the survey:

a) Profile of HDB Resident Population and Households; and

b) Housing Satisfaction and Preferences.

The first part describes the profile of HDB resident population and households, specifically, the demographic and socio-economic profile of HDB residents. The second part focuses on residents' physical living environment in terms of their housing satisfaction and preferences, as well as their housing mobility and aspirations.

The other monograph, *Public Housing in Singapore: Social Well-Being of HDB Communities and Well-Being of Seniors and Singles (Occupiers),* explores the extent of community bonding and family ties of HDB residents. It also examines the well-being of seniors and singles (occupiers). Each of these population segments constitutes a significant demographic which entails special attention in regard to their housing needs and living arrangements.

*Part 1*

# Profile of HDB Resident Population and Households

*Part 1*

# Profile of HDB Resident Population and Households

## Introduction

Understanding the evolving demographics of the HDB population is crucial for shaping effective housing policies and development plans. As the cornerstone of the HDB living environment, the residents and their households provide valuable insights into the needs, expectations, and aspirations of the community. By monitoring these changes, we can better cater to diverse requirements, from design to provision, ensuring a satisfying living experience for all. The data also provides context for detailed analysis of topics presented in the monographs, such as residential mobility, satisfaction with life, community bonding, as well as specific demographic groups including seniors and single occupiers in HDB flats.

## Objectives

The objectives of Part 1 are as follows:

a) To provide updates on demographic profiles, as well as the economic characteristics of HDB resident population and households;

b) To identify emerging demographic trends; and

c) To set context for in-depth analysis of other topics and specific demographic groups in the Sample Household Survey (SHS).

## Framework and Source of Data

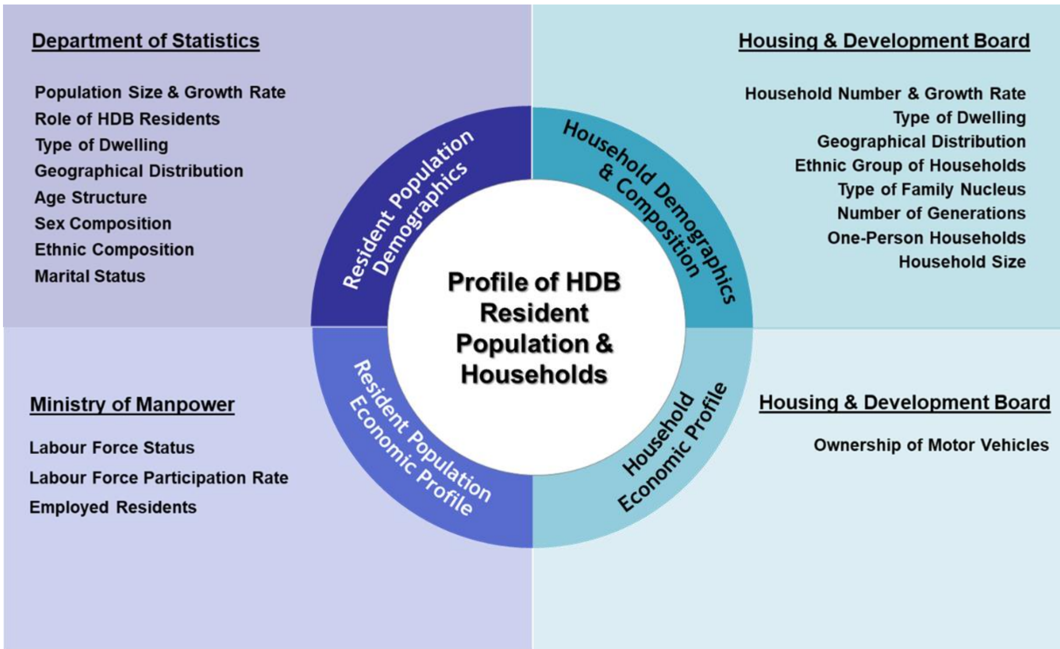
The profiles of HDB residents are examined and presented in aggregate forms using two different units of analysis: individual and household. They encompass key demographic and economic characteristics:

a) At the individual level, analyses of the HDB resident population (refer to Chapter 2: Profile of HDB Resident Population) are mainly based on administrative datasets from the Department of Statistics (DOS). These analyses provide insights into the population size and growth rate, the role of residents in HDB flats (e.g., owner, occupiers), types of dwelling in terms of tenure and flat type, geographical distribution by town/estate, age structure, sex composition, ethnic composition, and marital status. The Ministry of Manpower (MOM) assists in providing data on the economic characteristics, offering information on labour force status, labour force participation rate and age profile of the employed from its Comprehensive Labour Force Survey (CLFS).

   In SHS 2023/24, administrative data from DOS and CFLS from MOM of 2003, 2008, 2013, 2018 and 2023 are used. The figures on HDB resident population would differ from past SHS publications as they were based on survey data.

b) At the household level (refer to Chapter 3: Profile of HDB Households), detailed analyses on demographic profiles and household composition have been conducted using data from SHS. The demographic profile indicators include the number and growth of HDB households by flat type, geographical distribution by town/estate and the ethnic group of owners or registered tenants. Household composition indicators track the type of family nucleus, family composition, number of generations and household size. Vehicle ownership pattern is analysed using SHS data as an economic indicator.

Framework and Source of Data for Analysing the
Profile of HDB Resident Population and Households



# 2

# Profile of HDB Resident Population

*Chapter 2*

# Profile of HDB Resident Population

This chapter provides an update on the changing demographic profiles and economic characteristics of the resident population, comprising Singapore citizens and permanent residents living in HDB sold and rental flats.

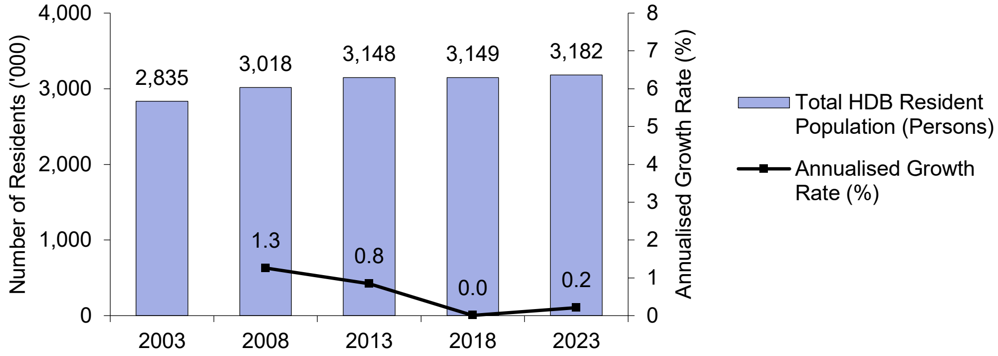
Unless otherwise specified, population figures from 2003 to 2023 were provided by Department of Statistics (DOS), compiled based on administrative data as at end-June of the reference year. Data on labour force participation were from Manpower Research and Statistics Department (MRSD) of Ministry of Manpower (MOM), derived from Comprehensive Labour Force Survey of the reference year. Figures may not add up to the totals due to rounding.

## 2.1 Demographic Characteristics of Resident Population

### *Size and growth rate of HDB resident population*

The resident population living in HDB flats stood at 3.18 million persons as at end-June 2023, increased from 3.15 million persons as at end-June 2018 (Chart 2.1). The annualised growth rate of the HDB resident population between 2018 and 2023 was 0.2%, which was marginally higher than the near-zero annualised growth rate in the preceding five-year period.

Chart 2.1
HDB Resident Population and Growth Rate by Year




*Source: DOS*

## *Role of HDB resident population*

Overall, about half (51.9%) of the HDB resident population were HDB homeowners. Registered tenants renting a flat from HDB through the Public Rental Scheme and tenants renting from the open market constituted 1.7% and 2.3%, respectively (Table 2.1). The remaining 44.2% were occupiers in HDB flats.

Table 2.1
HDB Resident Population by Role, 2023

| Role | Persons | % |
|---|---|---|
| **Owner/Co-owner (of Sold Flats)** | 1,649,897 | 51.9 |
| **Registered Tenant (of HDB Public Rental Flats)** | 53,068 | 1.7 |
| **Occupier** | 1,405,385 | 44.2 |
| **Open-market Tenant** | 73,332 | 2.3 |
| **Total** | 3,181,682 | 100.0 |

*Source: DOS*

## *Type of dwelling by tenure and flat type*

The majority of HDB residents (96.1%) resided in sold flats, while the remaining 3.9% lived in HDB public rental flats (Table 2.2). Over the past decade, there had been a slight decrease in the proportion of residents living in HDB public rental flats, attributed to HDB's efforts to encourage and support rental tenants transitioning to homeownership. In terms of flat type[1], 42.6% of HDB residents lived in 4-room flats, followed by 33.8% in 5-room and bigger flats, and 17.6% in 3-room flats in 2023. Over the past decade, the proportion of HDB residents in 4-room and bigger flats had seen a slight increase, while the proportion in 3-room flats had decreased. Notably, the proportion of HDB residents in 1- and 2-room flats had increased over time, due to the increased supply of 2-room Flexi flats in recent years. These flats mainly cater to seniors who wish to right-size, and first-timer singles aged 35 years and above who want to buy new 2-room Flexi flats[2].

Table 2.2
HDB Resident Population by Tenure, Flat Type and Year

| Tenure & Flat Type | | 2003 | 2008 | 2013 | 2018 | 2023 |
|---|---|---|---|---|---|---|
| **Tenure** | | | | | | |
| Rental | | 2.8 | 3.0 | 4.1 | 4.1 | 3.9 |
| Sold | | 97.2 | 97.0 | 95.9 | 95.9 | 96.1 |
| **Flat Type** | | | | | | |
| 1- & 2-Room | | 3.1 | 3.4 | 4.6 | 5.4 | 6.0 |
| 3-Room | | 22.3 | 20.5 | 19.4 | 18.6 | 17.6 |
| 4-Room | | 41.4 | 41.2 | 41.4 | 42.3 | 42.6 |
| 5-Room & Bigger* | | 33.2 | 35.0 | 34.6 | 33.7 | 33.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 2,835,299 | 3,017,728 | 3,147,634 | 3,149,249 | 3,181,682 |

*Source: DOS*

** Including residents living in non-privatised Housing and Urban Development Company (HUDC) flats prior to 2017*

## *Geographical distribution by town/estate*

Tampines, Jurong West and Woodlands remained the most populous towns in 2023, each housing over 230,000 HDB residents (Table 2.3). Sengkang and Yishun followed closely, housing between 200,000 and 220,000 HDB residents. Towns with significant additions to housing stock, such as Punggol, Sembawang and Bukit Batok, saw the highest population growth. In addition, towns with an average age of blocks of below 20 years, namely Punggol, Sembawang and

[1] HDB rental flats under Public Rental Scheme are included and categorised in their respective room type in Chapter 2.

[2] The Single Singapore Citizen (SSC) Scheme was first introduced in 1991 to allow single Singaporeans aged 35 years and above to purchase HDB flats. The scheme was further revised and relaxed over the years. In July 2013, singles were allowed to buy new flats directly from HDB. In March 2015, the quota of 2-room BTO flats available for singles to purchase increased from 30% to 50%. In August 2022, the quota for singles applying for new flats in non-mature estates increased from 50% to 65%. In October 2024, location restrictions for singles were lifted allowing singles to purchase 2-room Flexi Build-To-Order (BTO) flats in all locations. Please refer to monograph on 'Public Housing in Singapore: Social Well-Being of HDB Communities and Well-Being of Seniors and Singles (Occupiers)', Chapter 6 Well-Being of Singles (Occupiers) for more details.

Sengkang, registered higher population growth in the past decade. Conversely, towns/estates with little or no increase in housing stock experienced the most decline in their HDB resident population.

Table 2.3
HDB Resident Population by Town/Estate and Year

| Town/Estate | | 2013 | | 2018 | | 2023 | |
|---|---|---|---|---|---|---|---|
| | | Persons | % | Persons | % | Persons | % |
| **< 20 Years** | Punggol | 87,610 | 2.8 | 140,490 | 4.5 | 169,060 | 5.3 |
| | Sembawang | 67,790 | 2.2 | 76,520 | 2.4 | 92,420 | 2.9 |
| | Sengkang | 172,680 | 5.5 | 212,220 | 6.7 | 218,650 | 6.9 |
| **20 - 30 Years** | Bukit Batok | 111,650 | 3.6 | 111,490 | 3.5 | 133,190 | 4.2 |
| | Bukit Panjang | 115,630 | 3.7 | 118,960 | 3.8 | 115,520 | 3.6 |
| | Choa Chu Kang | 157,200 | 5.0 | 167,220 | 5.3 | 164,030 | 5.2 |
| | Hougang | 172,910 | 5.5 | 169,560 | 5.4 | 168,440 | 5.3 |
| | Jurong West | 254,980 | 8.1 | 245,830 | 7.8 | 236,160 | 7.4 |
| | Pasir Ris | 108,900 | 3.5 | 105,430 | 3.3 | 99,950 | 3.1 |
| | Tampines | 233,800 | 7.4 | 223,570 | 7.1 | 238,080 | 7.5 |
| | Woodlands | 238,410 | 7.6 | 234,950 | 7.5 | 235,660 | 7.4 |
| | Yishun | 176,570 | 5.6 | 193,960 | 6.2 | 201,100 | 6.3 |
| **> 30 Years** | Ang Mo Kio | 149,330 | 4.8 | 134,890 | 4.3 | 129,030 | 4.1 |
| | Bedok | 199,380 | 6.3 | 180,880 | 5.7 | 173,250 | 5.4 |
| | Bishan | 67,020 | 2.1 | 61,310 | 1.9 | 57,300 | 1.8 |
| | Bukit Merah | 146,590 | 4.7 | 137,950 | 4.4 | 130,210 | 4.1 |
| | Bukit Timah | 8,390 | 0.3 | 7,710 | 0.2 | 7,230 | 0.2 |
| | Central Area | 34,010 | 1.1 | 28,950 | 0.9 | 25,940 | 0.8 |
| | Clementi | 71,120 | 2.3 | 69,400 | 2.2 | 69,520 | 2.2 |
| | Geylang | 93,440 | 3.0 | 84,470 | 2.7 | 82,870 | 2.6 |
| | Jurong East | 79,480 | 2.5 | 73,650 | 2.3 | 68,660 | 2.2 |
| | Kallang/ Whampoa | 106,310 | 3.4 | 102,400 | 3.3 | 97,670 | 3.1 |
| | Marine Parade | 22,700 | 0.7 | 20,090 | 0.6 | 18,540 | 0.6 |
| | Queenstown | 82,650 | 2.6 | 81,210 | 2.6 | 78,590 | 2.5 |
| | Serangoon | 73,400 | 2.3 | 65,700 | 2.1 | 61,090 | 1.9 |
| | Toa Payoh | 108,780 | 3.5 | 100,450 | 3.2 | 109,520 | 3.4 |
| **Total** | | 3,140,720* | 100.0 | 3,149,250 | 100.0 | 3,181,680 | 100.0 |

** Excluding residents living in non-privatised Housing and Urban Development Company (HUDC) flats*

*Note:*

*a) HDB residents by town/estate are rounded to the nearest 10. Data source is DOS.*

*b) Towns/Estates are grouped based on average age of blocks in respective town/estate. The age of block is computed based on number of years from when the block was handed over as at June 2023. Data source is HDB.*

### *Age structure*

As the baby boomer generation[3] aged, along with longer life expectancy and declining fertility rate, the HDB resident population continued to grow older, resulting in a median age of 42.8 years in 2023 (Table 2.4).

Table 2.4
HDB Resident Population by Age and Year

| Age Group (Years) | | 2013 | 2018 | 2023 |
|---|---|---|---|---|
| **Below 15** | | 15.8 | 14.3 | 13.3 |
| **15 – 24** | | 13.5 | 12.0 | 10.3 |
| **25 – 34** | | 14.9 | 14.9 | 15.2 |
| **35 – 44** | | 15.8 | 14.8 | 14.2 |
| **45 – 54** | | 16.2 | 15.0 | 13.8 |
| **55 – 64** | | 13.2 | 14.9 | 14.9 |
| **65 & Above** | | 10.4 | 14.0 | 18.2 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 |
| | **Persons** | 3,147,634 | 3,149,249 | 3,181,682 |
| **Age (Years)** | | | | |
| **Mean** | | **38.5** | **40.7** | **42.7** |
| **Median** | | **38.6** | **40.8** | **42.8** |

*Source: DOS*

The proportion of seniors aged 65 years and above had increased rapidly, making up 18.2% of the HDB resident population in 2023 (Table 2.4). Similarly, the proportion of residents aged between 55 and 64 years had also grown compared with 2013, constituting 14.9% of the HDB resident population in 2023. Collectively, nearly one-third of the HDB resident population were aged 55 years and above. Compared with the national figures[4], there was a higher share of those aged 55 years and above among residents who resided in HDB flats than in private housing. Meanwhile, the share of HDB residents below 15 years old had continued to decrease, dropping from 15.8% in 2013 to 13.3% in 2023.

Due to higher life expectancy, the proportion of seniors among females was slightly higher at 19.3%, compared with 17.0% for males, leading to a higher median age for females at 43.7 years, compared with 41.9 years for males (Table 2.5) in 2023.

[3] Baby boomers are individuals born during the post-World War II baby boom period, approximately between 1946 and 1964.

[4] At the national level, those aged 55-64 years and aged 65 years and above constituted 14.3% and 17.3% of the resident population respectively in 2023, based on figures published by the Singapore Department of Statistics.

Table 2.5
HDB Resident Population by Age, Sex and Year

| Age Group (Years) | | Male | | | Female | | |
|---|---|---|---|---|---|---|---|
| | | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** |
| **Below 15** | | 16.5 | 15.0 | 14.0 | 15.2 | 13.7 | 12.6 |
| **15 – 24** | | 14.0 | 12.6 | 10.8 | 13.1 | 11.5 | 9.8 |
| **25 – 34** | | 14.6 | 14.8 | 15.4 | 15.3 | 15.0 | 15.0 |
| **35 – 44** | | 15.7 | 14.5 | 14.0 | 15.9 | 15.0 | 14.5 |
| **45 – 54** | | 16.6 | 15.1 | 13.6 | 15.9 | 15.0 | 14.0 |
| **55 - 64** | | 13.3 | 15.1 | 15.1 | 13.2 | 14.7 | 14.8 |
| **65 & Above** | | 9.4 | 12.9 | 17.0 | 11.4 | 15.1 | 19.3 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 1,555,303 | 1,546,541 | 1,553,558 | 1,592,331 | 1,602,708 | 1,628,124 |
| **Age (Years)** | | | | | | | |
| **Mean** | | **37.8** | **39.9** | **41.8** | **39.1** | **41.4** | **43.5** |
| **Median** | | **38.1** | **40.1** | **41.9** | **39.1** | **41.5** | **43.7** |

*Source: DOS*

There was a higher proportion of seniors among those living in smaller HDB flat types, with 30.0% among those living in 1- and 2-room flats, followed by 3-room flats at 24.7% (Table 2.6). Including the 17.6% who were aged between 55 and 64 years, close to half of the HDB residents living in 1- and 2-room flats were aged 55 years and above, with a median age of 53.2 years. Around four in ten HDB residents living in 3-room flats were aged 55 years and above, with the median age of 49.6 years for 3-room flats.

Towns where the average age of blocks was below 20 years, namely Punggol, Sembawang and Sengkang, had higher proportions of young residents aged below 15 years, at 21.6%, 17.0% and 17.2%, respectively (Table 2.7). In contrast, towns where the average age of blocks was above 30 years housed more seniors aged 65 years and above. The ageing effect was more evident in towns/estates with limited new housing, leading to younger residents moving to areas with new developments or private housing, leaving behind older residents who preferred to age in place. The five towns/estates with the highest concentration of seniors were Marine Parade (28.3%), Central Area (27.7%), Bukit Timah (27.5%), Ang Mo Kio and Bukit Merah (at 25.5% each).

Table 2.6
HDB Resident Population by Age, Flat Type and Year

| Age Group (Years) | | 1- & 2-Room | | | 3-Room | | | 4-Room | | | 5-Room & Bigger | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** | **2013** | **2018** | **2023** |
| **Below 15** | | 15.2 | 13.6 | 12.2 | 12.3 | 11.1 | 9.2 | 15.7 | 14.9 | 14.2 | 18.2 | 15.5 | 14.6 |
| **15 – 24** | | 11.9 | 11.2 | 9.2 | 10.2 | 9.2 | 8.3 | 13.8 | 11.6 | 9.7 | 15.3 | 14.2 | 12.3 |
| **25 – 34** | | 10.4 | 10.0 | 10.1 | 14.1 | 13.0 | 12.7 | 16.6 | 16.6 | 16.7 | 14.1 | 14.7 | 15.5 |
| **35 – 44** | | 9.9 | 8.7 | 8.9 | 15.6 | 14.5 | 13.3 | 15.9 | 15.8 | 15.7 | 16.6 | 14.6 | 13.8 |
| **45 – 54** | | 15.9 | 13.5 | 11.9 | 17.1 | 15.9 | 14.7 | 15.9 | 14.4 | 13.4 | 16.2 | 15.7 | 14.2 |
| **55 - 64** | | 16.4 | 18.5 | 17.6 | 15.5 | 16.7 | 17.1 | 12.9 | 14.3 | 14.1 | 11.9 | 14.2 | 14.5 |
| **65 & Above** | | 20.3 | 24.4 | 30.0 | 15.2 | 19.6 | 24.7 | 9.2 | 12.5 | 16.3 | 7.8 | 11.2 | 15.1 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 143,445 | 170,955 | 190,208 | 612,096 | 584,821 | 561,310 | 1,303,959 | 1,331,440 | 1,354,585 | 1,081,223 | 1,062,033 | 1,075,579 |
| **Age (Years)** | | | | | | | | | | | | | |
| **Mean** | | **43.7** | **45.8** | **48.2** | **42.6** | **44.9** | **47.6** | **37.8** | **39.6** | **41.5** | **36.3** | **38.8** | **40.7** |
| **Median** | | **46.9** | **50.4** | **53.2** | **43.6** | **46.4** | **49.6** | **37.3** | **39.0** | **40.9** | **36.6** | **38.9** | **40.5** |

*Source: DOS*
*Note: Non-privatised Housing and Urban Development Company (HUDC) flats are excluded*

Table 2.7
HDB Resident Population by Age and Town/Estate, 2023

| Age Group (Years) | | < 20 Years | | | 20 - 30 Years | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Punggol | Semba-wang | Sengkang | Bukit Batok | Bukit Panjang | Choa Chu Kang | Hougang | Jurong West | Pasir Ris | Tampines | Wood-lands | Yishun |
| **Below 15** | | 21.6 | 17.0 | 17.2 | 15.1 | 13.7 | 13.2 | 11.5 | 13.2 | 11.5 | 13.7 | 13.8 | 14.3 |
| **15 – 24** | | 9.5 | 11.9 | 11.0 | 9.8 | 11.3 | 12.3 | 9.8 | 12.1 | 12.6 | 9.7 | 13.4 | 9.9 |
| **25 – 34** | | 14.1 | 16.3 | 14.2 | 16.1 | 15.8 | 17.5 | 15.8 | 14.7 | 18.4 | 17.7 | 16.8 | 15.7 |
| **35 – 44** | | 21.2 | 15.7 | 17.6 | 14.9 | 14.0 | 13.0 | 13.3 | 14.2 | 10.7 | 13.6 | 13.0 | 15.4 |
| **45 – 54** | | 14.6 | 15.6 | 14.9 | 13.3 | 13.7 | 13.5 | 13.0 | 15.2 | 12.4 | 11.6 | 14.7 | 13.0 |
| **55 - 64** | | 9.4 | 12.9 | 12.5 | 14.3 | 15.5 | 16.7 | 16.7 | 14.8 | 19.5 | 15.6 | 15.7 | 15.3 |
| **65 & Above** | | 9.6 | 10.6 | 12.6 | 16.5 | 16.1 | 13.8 | 20.0 | 15.9 | 14.9 | 18.0 | 12.6 | 16.3 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 169,060 | 92,420 | 218,650 | 133,190 | 115,520 | 164,030 | 168,440 | 236,160 | 99,950 | 238,080 | 235,660 | 201,100 |
| **Age (Years)** | | | | | | | | | | | | | |
| **Mean** | | **35.6** | **37.5** | **38.5** | **40.6** | **41.1** | **40.3** | **43.6** | **41.2** | **41.5** | **41.6** | **39.5** | **41.1** |
| **Median** | | **37.3** | **37.9** | **39.4** | **40.7** | **41.5** | **40.2** | **44.7** | **42.2** | **42.0** | **41.1** | **39.6** | **41.3** |

Table 2.7
HDB Resident Population by Age and Town/Estate, 2023 *(cont'd)*

| Age Group (Years) | | > 30 Years | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **Ang Mo Kio** | **Bedok** | **Bishan** | **Bukit Merah** | **Bukit Timah** | **Central Area** | **Clementi** | **Geylang** | **Jurong East** | **Kallang/ Whampoa** | **Marine Parade** | **Queens-town** | **Seran-goon** | **Toa Payoh** |
| **Below 15** | | 10.1 | 10.5 | 10.4 | 11.3 | 12.3 | 9.6 | 11.9 | 10.7 | 10.4 | 10.6 | 11.4 | 11.7 | 9.1 | 12.3 |
| **15 – 24** | | 8.8 | 9.6 | 9.2 | 8.2 | 9.0 | 7.7 | 8.8 | 8.7 | 10.8 | 8.1 | 9.3 | 8.2 | 9.3 | 8.2 |
| **25 – 34** | | 12.8 | 13.8 | 16.0 | 12.5 | 13.6 | 11.6 | 13.2 | 15.4 | 13.7 | 12.9 | 9.6 | 13.3 | 15.5 | 15.1 |
| **35 – 44** | | 13.1 | 12.6 | 12.2 | 13.5 | 11.6 | 12.8 | 14.3 | 13.0 | 12.9 | 13.6 | 11.3 | 14.1 | 12.3 | 13.5 |
| **45 – 54** | | 14.2 | 13.3 | 12.8 | 14.6 | 12.3 | 15.0 | 14.3 | 13.2 | 14.2 | 14.1 | 15.0 | 14.7 | 12.5 | 13.6 |
| **55 - 64** | | 15.5 | 16.3 | 15.9 | 14.5 | 13.8 | 15.7 | 13.6 | 15.6 | 15.6 | 15.3 | 15.0 | 13.9 | 16.2 | 14.4 |
| **65 & Above** | | 25.5 | 24.0 | 23.5 | 25.5 | 27.5 | 27.7 | 24.0 | 23.5 | 22.3 | 25.4 | 28.3 | 24.2 | 25.1 | 22.9 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 129,030 | 173,250 | 57,300 | 130,210 | 7,230 | 25,940 | 69,520 | 82,870 | 68,660 | 97,670 | 18,540 | 78,590 | 61,090 | 109,520 |
| **Age (Years)** | | | | | | | | | | | | | | | |
| **Mean** | | **46.7** | **45.7** | **45.2** | **46.4** | **46.2** | **48.3** | **45.1** | **45.4** | **44.8** | **46.6** | **48.0** | **45.8** | **46.2** | **44.7** |
| **Median** | | **48.8** | **47.8** | **46.8** | **48.1** | **48.2** | **50.4** | **46.2** | **46.8** | **46.7** | **48.6** | **50.7** | **46.9** | **48.3** | **45.7** |

*Note:*
*a) HDB residents by town/estate are rounded to the nearest 10. Data source is DOS.*
*b) Towns/Estates are grouped based on average age of blocks in respective town/estate. The age of block is computed based on number of years from when the block was handed over as at June 2023. Data source is HDB.*

### *Sex composition*

Among the HDB resident population, female residents constituted 51.2%, while male residents made up 48.8% in 2023 (Table 2.8).

Table 2.8
HDB Resident Population by Sex and Year

| Sex | | 2003 | 2008 | 2013 | 2018 | 2023 |
|---|---|---|---|---|---|---|
| **Male** | | 49.9 | 49.7 | 49.4 | 49.1 | 48.8 |
| **Female** | | 50.1 | 50.3 | 50.6 | 50.9 | 51.2 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 2,835,299 | 3,017,728 | 3,147,634 | 3,149,249 | 3,181,682 |

*Source: DOS*

### *Ethnic composition*

The ethnic composition of the resident population living in HDB flats had remained stable compared with 2018. Chinese residents continued to form the majority at 71.2%, followed by Malays at 16.9%, Indians at 9.1% and Others at 2.8% in 2023 (Table 2.9). Compared to 2003, there was a gradual decrease in the proportion of Chinese residents, while the proportion of Malay, Indian and Others residents saw a slight increase.

Table 2.9
HDB Resident Population by Ethnic Group and Year

| Ethnic Group | | 2003 | 2008 | 2013 | 2018 | 2023 |
|---|---|---|---|---|---|---|
| **Chinese** | | 74.4 | 72.8 | 72.3 | 71.8 | 71.2 |
| **Malay** | | 16.2 | 16.0 | 15.8 | 16.4 | 16.9 |
| **Indian** | | 8.2 | 9.1 | 9.2 | 9.2 | 9.1 |
| **Others** | | 1.2 | 2.2 | 2.7 | 2.6 | 2.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 2,835,299 | 3,017,728 | 3,147,634 | 3,149,249 | 3,181,682 |

*Source: DOS*

Compared with the overall HDB resident population, the proportions living in 4-room and bigger flats among the Chinese was higher, whereas proportionately more Malay and Indian residents lived in 3-room and smaller flats (Table 2.10). Additionally, there had been an increase in the proportion of residents living in 1- and 2-room flats across all ethnic groups over the past decade.

Table 2.10
HDB Resident Population by Flat Type, Ethnic Group and Year

| Flat Type | | Chinese | | | Malay | | | Indian | | | Others | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 | 2013 | 2018 | 2023 |
| **1- & 2-Room** | | 3.2 | 3.7 | 4.2 | 10.1 | 12.6 | 13.3 | 5.8 | 6.8 | 7.0 | 3.0 | 4.2 | 5.0 | 4.6 | 5.4 | 6.0 |
| **3-Room** | | 19.3 | 18.3 | 17.4 | 19.5 | 19.1 | 18.1 | 20.5 | 19.4 | 18.1 | 19.8 | 19.8 | 19.4 | 19.4 | 18.6 | 17.6 |
| **4-Room** | | 41.7 | 42.9 | 43.5 | 41.5 | 41.2 | 40.4 | 40.0 | 40.1 | 40.1 | 39.5 | 40.5 | 41.2 | 41.4 | 42.3 | 42.6 |
| **5-Room & Bigger*** | | 35.8 | 35.2 | 35.0 | 29.0 | 27.2 | 28.3 | 33.7 | 33.6 | 34.8 | 37.7 | 35.6 | 34.4 | 34.6 | 33.7 | 33.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons** | 2,276,866 | 2,261,628 | 2,265,443 | 497,052 | 515,549 | 536,415 | 290,277 | 289,591 | 290,573 | 83,439 | 82,481 | 89,251 | 3,147,634 | 3,149,249 | 3,181,682 |

*Source: DOS*
** Including residents living in non-privatised Housing and Urban Development Company (HUDC) flats prior to 2017*

### *Marital status*

The distribution of the HDB resident population aged 15 years and above by marital status showed slight shifts over the last two decades. The proportion of residents who were divorced or separated increased from 2.4% in 2003 to 4.7% in 2023, while the proportions of residents who were single, married and widowed each decreased by at least 0.5 percentage points over the same period (Table 2.11). In 2023, 60.1% of the residents aged 15 years and above were married, while 30.0% were single. Widowed persons and those who were divorced or separated accounted for the remaining 5.2% and 4.7%, respectively.

Table 2.11
HDB Resident Population Aged 15 Years and Above by Marital Status and Year

| Marital Status | | 2003 | 2008 | 2013 | 2018 | 2023 |
|---|---|---|---|---|---|---|
| **Single** | | 30.9 | 31.7 | 32.6 | 31.7 | 30.0 |
| **Married** | | 61.0 | 59.9 | 58.7 | 58.6 | 60.1 |
| **Widowed** | | 5.7 | 5.2 | 5.2 | 5.5 | 5.2 |
| **Divorced/Separated** | | 2.4 | 3.2 | 3.6 | 4.2 | 4.7 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **Persons*** | 2,273,400 | 2,434,600 | 2,621,000 | 2,723,500 | 2,776,700 |

*Source: DOS*
*Note: Figures are based on Comprehensive Labour Force Survey of the reference year*
** Figures are rounded to the nearest 100*

With longer life expectancy of females, a higher proportion of female residents were widowed (8.1%) compared with male residents (2.1%) in 2023, as shown in Table 2.12. Additionally, there were more female residents who were divorced/separated (5.7%) compared with male residents (3.6%). Correspondingly, the proportion of married or single female residents was lower than their male counterparts.

Table 2.12
HDB Resident Population Aged 15 Years and Above by Marital Status and Sex, 2023

| Marital Status | | Male | Female | All |
|---|---|---|---|---|
| **Single** | | 32.3 | 27.8 | 30.0 |
| **Married** | | 62.0 | 58.4 | 60.1 |
| **Widowed** | | 2.1 | 8.1 | 5.2 |
| **Divorced/Separated** | | 3.6 | 5.7 | 4.7 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 |
| | **Persons*** | 1,341,200 | 1,435,500 | 2,776,700 |

*Source: DOS*
*Note: Figures are based on Comprehensive Labour Force Survey of the reference year*
** Figures are rounded to the nearest 100*

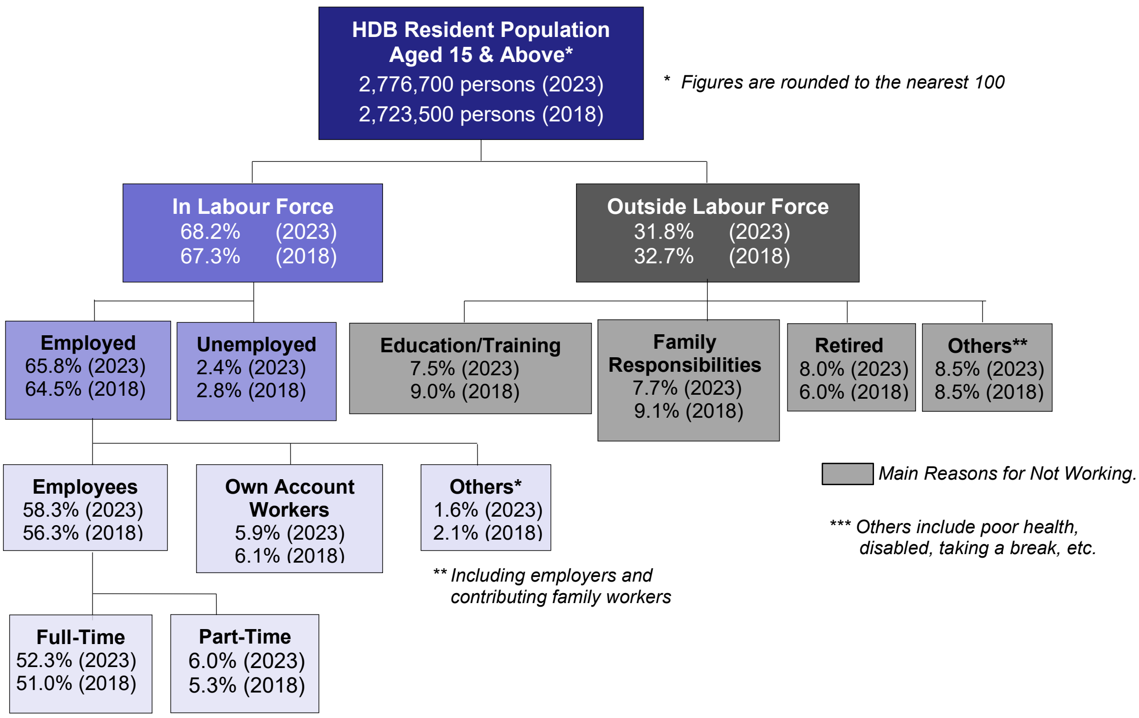
## 2.2 Economic Characteristics of Resident Population

### *Labour force status*

In 2023, 68.2% of the resident population aged 15 years and above in HDB flats were in the labour force, a slight increase from 67.3% in 2018 (Chart 2.2). The share of unemployed among the HDB resident population remained low at 2.4%, marking a decrease compared with five years ago.

While family responsibilities and education/training continued to be common reasons for not working, the proportion who were not working due to retirement rose from 6.0% in 2018 to 8.0% in 2023. This trend is expected to continue with an ageing population.

Chart 2.2
Labour Force Status of HDB Resident Population Aged 15 Years and Above by Year



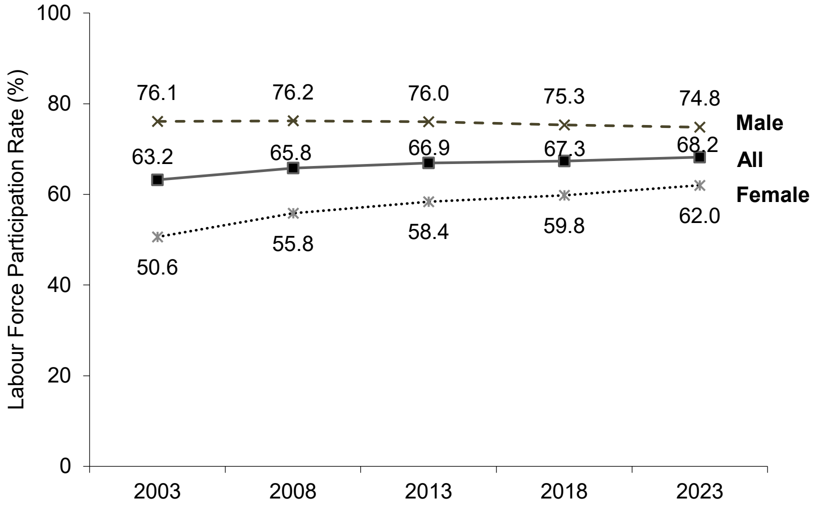

*Source: MRSD, MOM*

### *Labour force participation rate (LFPR)*

In 2023, 68.2% of HDB residents aged 15 years and above were either employed or actively seeking employment, continuing the upward trend observed since 2003 (Chart 2.3).

Although the LFPR for males saw a slight decline, the overall LFPR increased, primarily driven by a higher number of females participating in the labour force. The proportion of females in the labour force rose from 50.6% in 2003 to 62.0% in 2023. The rise can be attributed to later marriages, higher education levels among females[5] and supportive workplace practices, such as flexible work arrangements, which have enabled more females to remain in the workforce.

Chart 2.3
Labour Force Participation Rate of HDB Resident Population Aged 15 Years and Above by Sex and Year

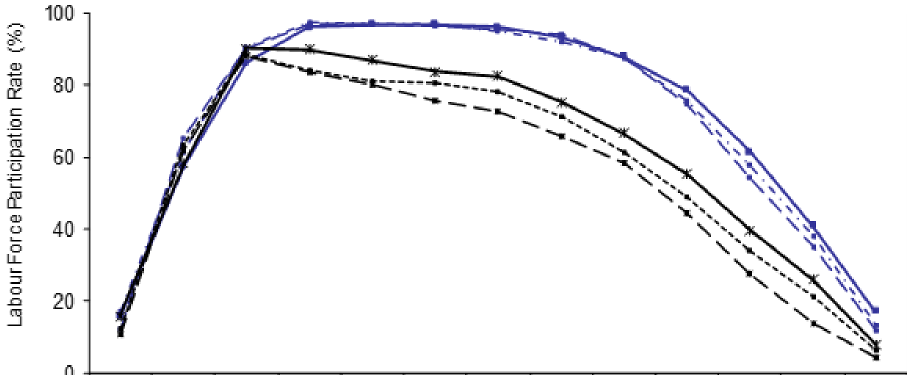



*Source: MRSD, MOM*

[5] At the national level, the tertiary-educated (i.e., diploma & professional qualification and university) made up 51.2% of resident females aged 25 years and above, up from 38.3% in 2013 and 22.1% in 2003. Department of Statistics. Singapore Residents Aged 25 Years & Over By Highest Qualification Attained, Sex And Age Group. Retrieved March 12, 2025 (https://tablebuilder.singstat.gov.sg/table/TS/M850581).

Chart 2.4 illustrates the age-sex-specific LFPR of HDB residents. For younger individuals aged 25 to 29 years, both male and female had higher LFPRs than those aged 15 to 24 years, reflecting their entry into the labour market after completing their education. In 2023, the male LFPR remained high in the prime-working age groups and reached its highest point at ages 40 to 44 years, with 97.0% of males in this age group participating in the labour force, before declining slightly from age 45 years. From age 60 years, the male LFPR dropped more substantially, reaching a low of 17.2% among those aged 75 years and above. In contrast, the female LFPR peaked at ages 25 to 29 years, with 90.2% of females participating in the labour force, and gradually decreased to a low of 7.9% among those aged 75 years and above.

Chart 2.4
Age-Sex Specific Labour Force Participation Rate of HDB Resident Population Aged 15 Years and Above by Year




| | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65-69 | 70-74 | 75 & Above |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Male (2023) | 15.6 | 57.6 | 86.4 | 96.2 | 96.9 | 97.0 | 96.2 | 93.5 | 88.1 | 78.7 | 61.4 | 40.9 | 17.2 |
| Male (2018) | 17.3 | 61.6 | 90.9 | 97.7 | 96.9 | 97.0 | 94.9 | 92.1 | 87.8 | 75.6 | 57.8 | 38.3 | 13.4 |
| Male (2013) | 12.2 | 65.3 | 90.1 | 97.2 | 97.3 | 96.8 | 95.8 | 94.0 | 87.7 | 74.8 | 54.5 | 35.2 | 11.7 |
| Female (2023) | 15.8 | 58.2 | 90.2 | 90.1 | 87.1 | 83.9 | 82.5 | 75.4 | 66.6 | 55.3 | 39.8 | 26.1 | 7.9 |
| Female (2018) | 12.3 | 63.3 | 88.9 | 84.3 | 81.3 | 80.8 | 78.1 | 71.4 | 61.2 | 48.9 | 34.3 | 21.2 | 6.3 |
| Female (2013) | 10.9 | 61.9 | 88.0 | 83.5 | 80.1 | 75.9 | 72.9 | 65.9 | 58.4 | 44.4 | 27.9 | 13.6 | 4.5 |

*Source: MRSD, MOM*

Over the past decade, it was evident that women and older residents have been the primary contributors to the rise in LFPR. The female LFPR had increased for nearly all age groups, except for those aged 20 to 24 years who saw a rising share still pursuing their studies. The increase in female LFPR for those aged 30 years and above could be attributed to later marriages and childbirth, the availability of more childcare facilities, and flexible work arrangements that support women with young children to remain in the workforce. Additionally, older women have returned to work after their children have grown up. While the male LFPR remained high for those below 60 years over the past ten years, there was an increase in men aged 60 years and above participating in the labour force. This trend among seniors was likely facilitated by the introduction of the Retirement and Re-employment Act (RRA)[6] in 2012, which allowed eligible older workers to continue working if they would like to do so. This proportion is expected to increase further, with statutory retirement and re-employment ages being raised to 65 and 70 years, respectively, by 2030[7].

### *Age distribution of employed residents*

Chart 2.5(a) illustrates the overall trends in the age distribution of employed HDB residents aged 15 years and above between 2013 and 2023. The proportion of employed persons aged between 20 and 24 years had gradually decreased over the past decade, from 7.3% in 2013 to 5.0% in 2023. This decline could be attributed to better educational attainment, with more residents in this age group still pursuing their studies, leading to a delay in employment, as well as a decreasing fertility rate, resulting in fewer younger residents entering the workforce. As the resident population continued to age, the proportion of employed HDB residents aged between 25 and 54 years had also decreased from 70.7% in 2013 to 65.2% in 2023. Conversely, the proportion of employed HDB residents aged 55 years and above increased over time, from 20.7% in 2013 to 28.6% in 2023. With more older residents and fewer younger residents participating in the workforce,

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6 In accordance with the Retirement and Re-employment Act (RRA), the minimum retirement age is 63 years with effect from 1 July 2022. Employers must offer re-employment to eligible employees who reach the minimum retirement age, up to the re-employment age of 68. Ministry of Manpower. Retrieved 12 March, 2025 (https://www.mom.gov.sg/employment-practices/re-employment).

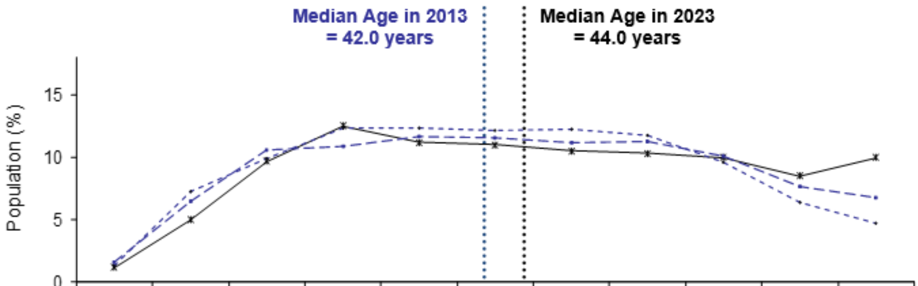
7 The retirement age, which is currently at 63 years old will go up to 64 years old in 2026 before being raised to 65 years old by 2030. The re-employment age of 68 years old will go up to 69 years old in 2029 before being raised to 70 years old by 2030. Ministry of Manpower. Retrieved 12 March, 2025 (https://www.mom.gov.sg/employment-practices/retirement).

the median age of employed residents had increased from 42.0 years in 2013 to 44.0 years in 2023.

Charts 2.5(b) and 2.5(c) illustrate the age distribution of the employed male and female HDB residents aged 15 years and above between 2013 and 2023. The percentage of employed females aged 20 to 24 years dropped from 7.3% in 2013 to 4.9% in 2023, likely due to delaying employment for higher education. The proportion of employed residents aged 60 years and above had increased significantly for both males and females. The proportion of employed males aged 60 years and above increased from 12.8% in 2013 to 20.4% in 2023, while females increased from 9.2% to 16.5%, remaining lower than that of males. The median age of employed males and females also rose to 45.0 and 43.0 years, respectively, in 2023.

Chart 2.5
Age Distribution of Employed HDB Resident Population Aged 15 Years and Above by Sex and Year

(a) All

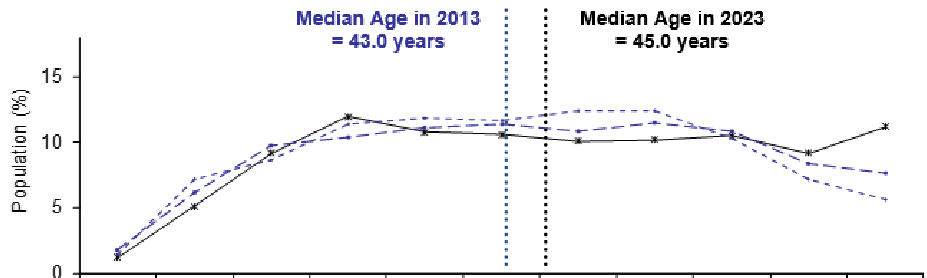



| | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65 & Above |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 1.2 | 5.0 | 9.7 | 12.5 | 11.2 | 11.0 | 10.5 | 10.3 | 10.0 | 8.5 | 10.0 |
| 2018 | 1.6 | 6.5 | 10.6 | 10.9 | 11.7 | 11.6 | 11.2 | 11.3 | 10.1 | 7.7 | 6.8 |
| 2013 | 1.3 | 7.3 | 9.9 | 12.3 | 12.3 | 12.1 | 12.2 | 11.8 | 9.6 | 6.4 | 4.7 |

*Source: MRSD, MOM*

Chart 2.5
Age Distribution of Employed HDB Resident Population Aged 15 Years and Above by Sex and Year *(cont'd)*

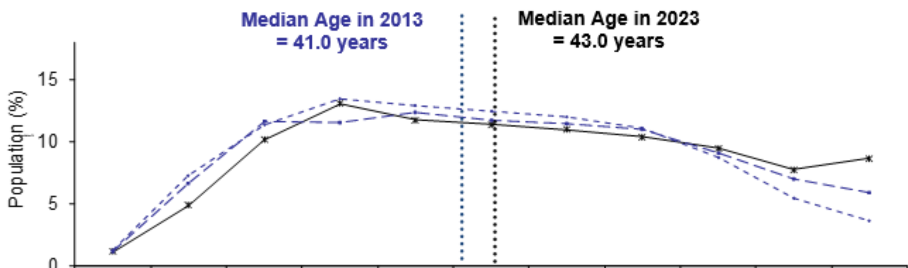
(b) Male




| | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65 & Above |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 1.2 | 5.1 | 9.2 | 12.0 | 10.8 | 10.6 | 10.1 | 10.2 | 10.5 | 9.2 | 11.2 |
| 2018 | 1.8 | 6.2 | 9.8 | 10.4 | 11.1 | 11.4 | 10.9 | 11.5 | 10.9 | 8.4 | 7.7 |
| 2013 | 1.4 | 7.2 | 8.7 | 11.4 | 11.9 | 11.7 | 12.4 | 12.4 | 10.3 | 7.2 | 5.6 |

*Source: MRSD, MOM*

(c) Female




| | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65 & Above |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 1.2 | 4.9 | 10.2 | 13.1 | 11.8 | 11.4 | 11.0 | 10.4 | 9.5 | 7.8 | 8.7 |
| 2018 | 1.2 | 6.7 | 11.7 | 11.6 | 12.4 | 11.8 | 11.5 | 11.0 | 9.1 | 7.0 | 5.9 |
| 2013 | 1.3 | 7.3 | 11.4 | 13.5 | 12.9 | 12.5 | 12.0 | 11.1 | 8.8 | 5.5 | 3.7 |

*Source: MRSD, MOM*

## 2.3 Summary of Findings

As of June 2023, the HDB resident population was recorded at 3.18 million. The annualised growth rate of the HDB resident population between 2018 and 2023 was 0.2%, which was marginally higher than the near-zero annualised growth rate in the preceding five-year period.

The majority of the HDB resident population lived in sold flats, predominantly 4-room flats. Over the past decade, the proportion of residents living in HDB rental flats had slightly declined, reflecting HDB's efforts to encourage and support rental tenants in becoming homeowners. The proportion of residents in 1- and 2-room flats had risen over time, attributed to the increased supply of 2-room Flexi flats in recent years.

Tampines, Jurong West, and Woodlands were the most populous towns in 2023. Towns like Punggol, Sembawang and Bukit Batok, which had significant additions to their housing stock, experienced higher population growth. Conversely, towns/estates with little or no increase in housing stock, such as Bishan, Central Area, Jurong East, Marine Parade and Serangoon, saw a larger decline in the population.

The median age of the HDB resident population had increased to 42.8 years in 2023, reflecting longer life expectancy and lower fertility rates. Seniors aged 65 years and above made up 18.2% of the HDB resident population, with higher proportions found in towns/estates where the average age of blocks was more than 30 years. In contrast, towns with newer blocks, such as Punggol, Sembawang, and Sengkang, had a greater proportion of younger residents. There was a higher proportion of seniors in smaller flats, with three in ten residents in 1- and 2-room flats being aged 65 years and above.

Close to seven in ten HDB residents were in the labour force. The majority of them were full-time employees, while only 2.4% were unemployed. The labour force participation rate among the HDB resident population increased slightly to 68.2% in 2023. Female participation in the labour force rose from 50.6% in 2003 to 62.0% in 2023, driven by later marriages, higher education levels, and flexible work options. Male labour force participation rate remained high in the prime-working age groups, while female participation peaked between 25 and 29 years old. Over the past decade, the increase in labour force participation was primarily due to women and older residents, supported by the Retirement and Re-employment Act (RRA) introduced in 2012. This trend is expected to continue with the statutory retirement and re-employment ages being raised by 2030.

# 3

# Profile of HDB Households

*Chapter 3*

# Profile of HDB Households

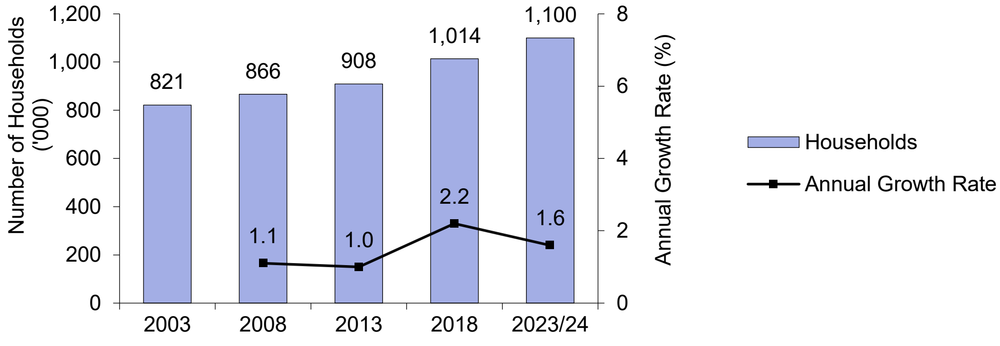
This chapter examines the demographic and economic characteristics of households residing in HDB flats. Where possible, trend analysis is used to illustrate the various social transformations that have occurred over time. These shifts not only highlight current trends but also provide a comprehensive overview that helps inform future urban planning and policymaking. Such insights are crucial for ensuring that HDB's strategies remain relevant and effectively cater to the community's evolving landscape. Additionally, the data presented in this chapter serves as a foundation for cross-analysis in other sections of the monographs.

## 3.1 Demographic Characteristics of HDB Households

### *Size and growth rate*

In 2023, there were 1,099,742 households living in HDB flats, registering an annualised growth rate of 1.6% from 1,013,542 in 2018 (Chart 3.1). This growth rate was lower than the previous annualised rate of 2.2% observed between 2013 and 2018.

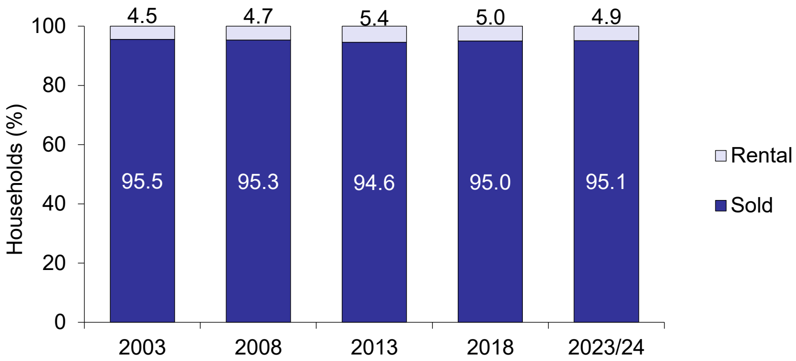
Chart 3.1
HDB Households and Growth Rate by Year



### *Type of dwelling by tenure, flat type and ethnic group of owner/registered tenant*

Of the approximately 1.1 million households living in HDB flats, the majority (95.1%) lived in sold flats (Chart 3.2). This proportion had gradually increased since 2013. Conversely, the proportion of households in HDB rental flats decreased slightly from 5.4% in 2013 to 4.9% in 2023/24, due to a larger increase in the quantum of sold flats compared with rental flats.

Chart 3.2
HDB Households by Tenure and Year




The number of households in all flat types increased compared with 2018. The number of households living in HDB rental flats was 54,168, an increase of 3,823 households from 2018 (Table 3.1).

Table 3.1
HDB Households by Flat Type and Year

| Flat Type | 2013 | | 2018 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | % | N | % | N | % | N |
| **Rental** | 5.4 | 49,162 | 5.0 | 50,345 | 4.9 | 54,168 |
| **1- & 2-Room** | 1.1 | 9,662 | 2.4 | 24,674 | 4.1 | 44,693 |
| **3-Room** | 23.8 | 216,116 | 22.9 | 232,052 | 22.1 | 243,054 |
| **4-Room** | 39.0 | 354,526 | 40.0 | 405,163 | 40.1 | 441,425 |
| **5-Room & Bigger** | 30.7 | 279,033 | 29.7 | 301,308 | 28.8 | 316,402 |
| **Total** | 100.0 | 908,499 | 100.0 | 1,013,542 | 100.0 | 1,099,742 |

The majority of households resided in 4-room flats (40.1%), followed by 5-room and bigger flats (28.8%) and 3-room flats (22.1%), as shown in Table 3.1. The proportion of households living in 1- and 2-room[8] flats increased from 2.4% in 2018 to 4.1% in 2023/24, mainly due to an increase in the provision of 2-room Flexi flats over the past five years. This had resulted in an increase of about 20,000 households residing in such flat types.

There were relatively more Malay (12.2%) and Indian (7.0%) households in HDB rental flats compared with the overall proportion living in rental flats(Table 3.2). The proportions of Chinese and Indian households living in rental flats had decreased over the past ten years. There was an increase in the number of households living in 1- and 2-room flats across Chinese, Malay and Indian households. Indian and Others households were over-represented in 5-room and bigger flats, with figures at 30.9% and 33.5% in 2023/24, respectively. The proportion of Others households in these flats had decreased compared with 2018.

[8] Unless otherwise stated, the “1- & 2-room” and “1- and 2-room” flats in Chapter 3 include Studio Apartments, 2-room flats and 2-room Flexi flats that may be directly purchased from HDB or via resale market. Flats under Public Rental Scheme are not included.

Table 3.2
HDB Households by Flat Type, Ethnic Group of Owner/Registered Tenant and Year

| Flat Type | | Chinese | | | Malay | | | Indian | | | Others | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** |
| **Rental** | | 4.2 | 3.6 | 3.4 | 11.7 | 11.9 | 12.2 | 7.3 | 6.8 | 7.0 | 5.0 | 2.5 | -* | 5.4 | 5.0 | 4.9 |
| **1- & 2-Room** | | 1.1 | 2.3 | 4.1 | 1.2 | 3.2 | 4.7 | 0.8 | 2.3 | 3.2 | 1.0 | 1.0 | -* | 1.1 | 2.4 | 4.1 |
| **3-Room** | | 24.2 | 23.0 | 22.4 | 22.5 | 22.3 | 21.6 | 22.6 | 23.4 | 20.7 | 19.9 | 20.7 | 20.6 | 23.8 | 22.9 | 22.1 |
| **4-Room** | | 39.1 | 40.6 | 40.8 | 38.9 | 38.2 | 38.0 | 38.3 | 38.0 | 38.2 | 38.7 | 37.2 | 38.7 | 39.0 | 40.0 | 40.1 |
| **5-Room & Bigger** | | 31.4 | 30.4 | 29.4 | 25.8 | 24.4 | 23.5 | 31.0 | 29.6 | 30.9 | 35.4 | 38.5 | 33.5 | 30.7 | 29.7 | 28.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100 | 100 |
| | **N** | 702,366 | 773,953 | 834,633 | 113,489 | 132,029 | 154,608 | 78,759 | 88,151 | 92,788 | 13,885 | 19,409 | 17,714 | 908,499 | 1,013,542 | 1,099,742 |

** Values with high coefficient of variation (CV) were dropped*

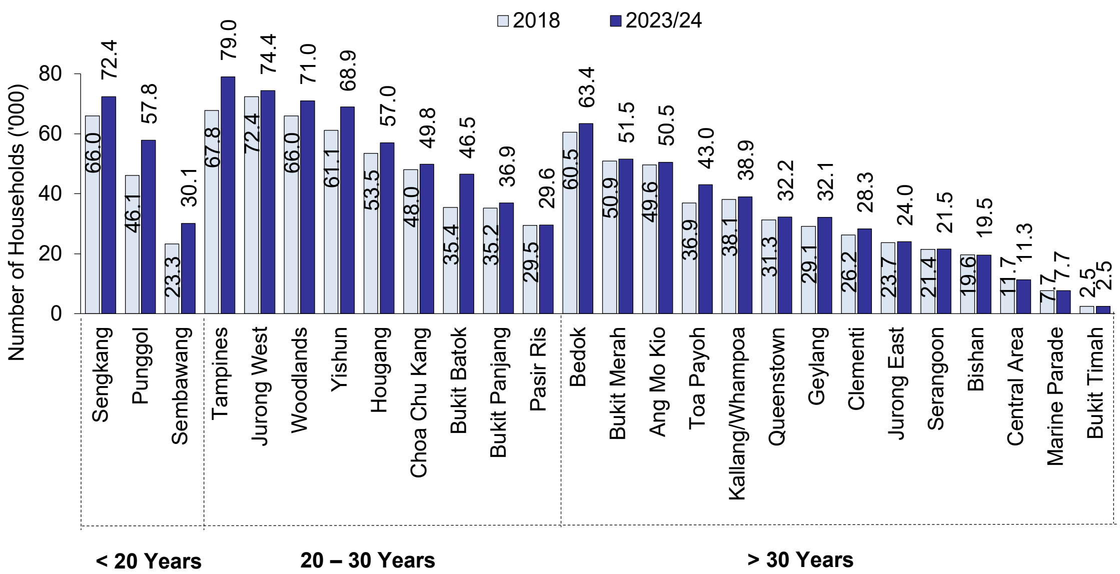
*Note: Figures may not add up to 100.0% due to rounding*

*Geographical distribution by HDB Town/Estate*

Tampines, Jurong West, and Sengkang had the highest number of households (Chart 3.3). Compared with 2018, Punggol, Tampines, and Bukit Batok experienced the largest increase in the number of households, due to completion of new flats in these towns over the past five years.

Towns/estates with a higher proportion of rental flats included Central Area, Bukit Merah, Marine Parade and Kallang/Whampoa (Table 3.3). Towns that were developed earlier generally had a higher proportion of households in 3-room flats.

Chart 3.3
HDB Households by Town/Estate and Year




*Note: Towns/Estates are grouped based on average age of blocks in respective town/estate. The age of block is computed based on number of years from when the block was handed over as at June 2023.*

Table 3.3
HDB Households by Town/Estate and Flat Type

| Town/Estate | | Rental | 1- & 2-Room | 3-Room | 4-Room | 5-Room & Bigger | Total | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | % | N |
| < 20 Years | Punggol | 3.5 | 8.8 | 10.3 | 44.2 | 33.2 | 100.0 | 57,788 |
| | Sembawang | 5.4 | 8.7 | 5.6 | 40.7 | 39.6 | 100.0 | 30,067 |
| | Sengkang | 1.7 | 6.2 | 6.1 | 45.2 | 40.7 | 100.0 | 72,407 |
| 20 – 30 Years | Bukit Batok | 3.2 | 7.9 | 25.6 | 40.4 | 23.0 | 100.0 | 46,475 |
| | Bukit Panjang | 1.1 | 3.9 | 10.4 | 46.6 | 37.9 | 100.0 | 36,861 |
| | Choa Chu Kang | 2.5 | 2.7 | 5.3 | 48.0 | 41.6 | 100.0 | 49,784 |
| | Hougang | 2.2 | 3.9 | 19.0 | 47.8 | 27.2 | 100.0 | 57,028 |
| | Jurong West | 3.0 | 2.5 | 15.9 | 40.0 | 38.6 | 100.0 | 74,376 |
| | Pasir Ris | 0.7 | 1.5 | 1.6 | 39.3 | 56.9 | 100.0 | 29,573 |
| | Tampines | 3.0 | 1.7 | 18.3 | 43.4 | 33.6 | 100.0 | 79,041 |
| | Woodlands | 4.8 | 4.0 | 10.2 | 42.6 | 38.3 | 100.0 | 71,045 |
| | Yishun | 2.9 | 6.3 | 23.5 | 47.2 | 20.2 | 100.0 | 68,863 |
| > 30 Years | Ang Mo Kio | 7.6 | 2.4 | 48.0 | 28.9 | 13.1 | 100.0 | 50,548 |
| | Bedok | 5.7 | 2.7 | 35.9 | 34.5 | 21.2 | 100.0 | 63,444 |
| | Bishan | 1.5 | 0.8 | 12.0 | 47.9 | 37.8 | 100.0 | 19,485 |
| | Bukit Merah | 15.7 | 4.2 | 29.8 | 32.1 | 18.3 | 100.0 | 51,547 |
| | Bukit Timah | 0.0 | 4.8 | 17.1 | 36.2 | 41.9 | 100.0 | 2,529 |
| | Central Area | 22.3 | 3.0 | 36.6 | 30.1 | 8.0 | 100.0 | 11,342 |
| | Clementi | 3.1 | 1.1 | 42.6 | 36.7 | 16.6 | 100.0 | 28,276 |
| | Geylang | 8.2 | 5.0 | 36.6 | 36.4 | 13.8 | 100.0 | 32,060 |
| | Jurong East | 2.5 | 1.8 | 29.2 | 34.1 | 32.5 | 100.0 | 23,950 |
| | Kallang/ Whampoa | 14.0 | 2.8 | 36.0 | 31.9 | 15.3 | 100.0 | 38,906 |
| | Marine Parade | 15.7 | -* | 38.9 | 23.3 | 21.8 | 100.0 | 7,660 |
| | Queenstown | 6.3 | 5.4 | 41.6 | 32.2 | 14.5 | 100.0 | 32,203 |
| | Serangoon | 2.1 | 1.0 | 20.9 | 47.5 | 28.5 | 100.0 | 21,458 |
| | Toa Payoh | 7.2 | 4.4 | 38.7 | 32.1 | 17.6 | 100.0 | 43,026 |
| | **All** | 4.9 | 4.1 | 22.1 | 40.1 | 28.8 | 100.0 | 1,099,742 |

** Values with high coefficient of variation (CV) were dropped*

*Note: Figures may not add up to 100.0% due to rounding*

## 3.2 Household Composition

The composition of a household reflects the characteristics and relationships of those living together. Households can be family-based, such as families with or without children, siblings, and extended family members (e.g., grandparents, relatives) living together. They can also be non-family based, such as individuals living alone or unrelated/distantly related individuals living together. Changes in household composition could be a result of changes to family structure due to events such as marriage, divorce, birth or death, which could eventually lead to changes in household size. Lifestyle shifts, such as a growing preference for personal space and independent living, could also lead to changes in household composition. These shifts could have been further facilitated by housing policies such as the introduction of 2-room Flexi and 3Gen flats to accommodate various living arrangements and allowing singles aged 35 years and above to purchase 2-room Flexi flats.

This section explores the characteristics of HDB households, focusing on the type of family nucleus, the number of generations within households, and household size. Additionally, it will highlight one-person households, which had increased significantly over the past decade.

### *Type of family nucleus*

Family-based households remained the most common household composition, making up 83.0% of HDB households, although this percentage had decreased over time (Table 3.4). The majority of these family-based households were nuclear families, comprising 72.2% of HDB households. The proportion of family-based households had declined compared with a decade ago.

Non-family based households accounted for about one in six (17.0%) households, with most being one-person households. The proportion of one-person households had more than doubled over the past 20 years. This could be attributed to factors such as an ageing population and a preference for independent living.

Table 3.4
HDB Households by Type of Family Nucleus and Year

| Type of Family Nucleus | | 2003 | 2008 | 2013 | 2018 | 2023/24 |
|---|---|---|---|---|---|---|
| **Family-Based Household** | | **91.3** | **90.9** | **90.8** | **86.6** | **83.0** |
| Nuclear family | | 80.4 | 79.4 | 76.3 | 75.6 | 72.2 |
| Extended nuclear family | | 7.7 | 7.4 | 8.3 | 6.4 | 5.7 |
| Multi-nuclear family | | 3.2 | 4.1 | 6.2 | 4.6 | 5.2 |
| **Non-Family Based Household** | | **8.7** | **9.2** | **9.2** | **13.5** | **17.0** |
| One-person | | 7.1 | 8.0 | 8.4 | 12.6 | 15.6 |
| Unrelated/Distantly related | | 1.6 | 1.2 | 0.8 | 0.9 | 1.4 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N*** | 821,126 | 866,026 | 908,499 | 1,013,542 | 1,091,340 |

* *Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

## *Type of family nucleus by tenure and flat type*

Approximately 58.4% of households residing in HDB rental flats were family-based, with nuclear families being the most common (Table 3.5). This proportion was lower compared with the 73.0% of family-based households in sold flats. HDB rental flats had higher percentages of one-person households (36.4%) and households with unrelated or distantly related persons (5.2%) than sold flats. Since 2013, the proportion of one-person households in both rental and sold flats had increased significantly.

Family-based households were predominantly in bigger flat types, with 90.2% in 4-room flats and 94.3% in 5-room and bigger flats (Table 3.6). In relative terms, there were proportionally more non-family based households, particularly one-person households, in 3-room and smaller flat types.

Overall, the proportion of non-family based households in all flat types had increased over the past decade. This increase was mainly due to an increase in the proportion of one-person households.

Table 3.5
HDB Households by Type of Family Nucleus, Tenure and Year

| Type of Family Nucleus | | Rental | | | Sold | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **68.4** | **65.2** | **58.4** | **92.1** | **87.7** | **84.3** | **90.8** | **86.6** | **83.0** |
| Nuclear family | | 63.1 | 60.4 | 56.1 | 77.2 | 76.4 | 73.0 | 76.3 | 75.6 | 72.2 |
| Extended nuclear family | | 3.7 | 4.1 | 1.5 | 8.5 | 6.5 | 5.9 | 8.3 | 6.4 | 5.7 |
| Multi-nuclear family | | -* | 0.7 | -* | 6.4 | 4.8 | 5.4 | 6.2 | 4.6 | 5.2 |
| **Non-Family Based Household** | | **31.6** | **34.8** | **41.6** | **7.9** | **12.4** | **15.7** | **9.2** | **13.5** | **17.0** |
| One-person | | 23.7 | 26.8 | 36.4 | 7.5 | 11.9 | 14.5 | 8.4 | 12.6 | 15.6 |
| Unrelated/Distantly related | | 7.9 | 8.0 | 5.2 | 0.4 | 0.5 | 1.2 | 0.8 | 0.9 | 1.4 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 49,162 | 50,345 | 53,454 | 859,337 | 963,197 | 1,037,886 | 908,499 | 1,013,542 | 1,091,340 |

* *Values with high coefficient of variation (CV) were dropped*
** *Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

Table 3.6
HDB Households by Type of Family Nucleus, Flat Type and Year

| Type of Family Nucleus | | Rental | | | 1- & 2-Room | | | 3-Room | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **68.5** | **65.2** | **58.4** | **60.6** | **60.6** | **42.0** | **79.9** | **74.1** | **68.3** |
| Nuclear family | | 63.1 | 60.4 | 56.1 | 56.1 | 57.6 | 39.4 | 69.9 | 66.9 | 61.5 |
| Extended nuclear family | | 3.7 | 4.1 | 1.5 | -* | 1.6 | 1.5 | 6.0 | 4.2 | 4.1 |
| Multi-nuclear family | | -* | 0.7 | -* | -* | -* | -* | 4.0 | 3.0 | 2.8 |
| **Non-Family Based Household** | | **31.5** | **34.8** | **41.6** | **39.4** | **39.4** | **58.0** | **20.1** | **25.9** | **31.7** |
| One-person | | 23.6 | 26.8 | 36.4 | 37.9 | 38.8 | 55.2 | 19.2 | 24.9 | 30.0 |
| Unrelated/Distantly related | | 7.9 | 8.0 | 5.2 | -* | -* | 2.9 | 0.9 | 1.1 | 1.7 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 49,162 | 50,345 | 53,454 | 9,662 | 24,674 | 44,204 | 216,116 | 232,052 | 242,586 |

| Type of Family Nucleus | | 4-Room | | | 5-Room & Bigger | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **95.7** | **91.0** | **90.2** | **98.0** | **95.8** | **94.3** | **90.8** | **86.6** | **83.0** |
| Nuclear family | | 79.5 | 78.3 | 78.9 | 80.5 | 82.7 | 78.4 | 76.3 | 75.6 | 72.2 |
| Extended nuclear family | | 9.5 | 7.7 | 5.6 | 9.4 | 7.1 | 8.5 | 8.3 | 6.4 | 5.7 |
| Multi-nuclear family | | 6.7 | 5.0 | 5.8 | 8.1 | 6.1 | 7.5 | 6.2 | 4.6 | 5.2 |
| **Non-Family Based Household** | | **4.3** | **8.9** | **9.8** | **2.0** | **4.2** | **5.7** | **9.2** | **13.5** | **17.0** |
| One-person | | 3.9 | 8.7 | 8.8 | 2.0 | 3.9 | 4.7 | 8.4 | 12.6 | 15.6 |
| Unrelated/Distantly related | | 0.3 | -* | 0.9 | -* | -* | 1.0 | 0.8 | 0.9 | 1.4 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 354,526 | 405,163 | 437,978 | 279,033 | 301,308 | 313,118 | 908,499 | 1,013,542 | 1,091,340 |

**  Values with high coefficient of variation (CV) were dropped*
***  Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

### *Type of family nucleus by ethnic group of owner/registered tenant*

Family-based households remained the most prevalent household type across ethnic groups. About eight in ten Chinese households consisted of family-based households, while the proportion of family-based households was higher at 89.9% and 88.3% among Malay and Indian households, respectively (Table 3.7).

Over the past ten years, there had been a noticeable rise in non-family based households across all ethnic groups, driven primarily by the growth in the number of one-person households.

Table 3.7
HDB Households by Type of Family Nucleus, Ethnic Group of Owner/Registered Tenant and Year

| Type of Family Nucleus | | Chinese | | | Malay | | | Indian | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **89.9** | **84.9** | **81.0** | **94.3** | **92.4** | **89.9** | **94.1** | **92.1** | **88.3** | **90.9** | **86.6** | **83.0** |
| Nuclear family | | 76.6 | 74.9 | 71.0 | 72.5 | 75.7 | 74.0 | 79.7 | 82.6 | 76.3 | 79.4 | 75.6 | 72.2 |
| Extended nuclear family | | 7.9 | 6.0 | 5.7 | 10.6 | 8.9 | 7.2 | 8.3 | 4.2 | 4.2 | 7.4 | 6.4 | 5.7 |
| Multi-nuclear family | | 5.4 | 4.0 | 4.3 | 11.2 | 7.8 | 8.7 | 6.1 | 5.3 | 7.9 | 4.1 | 4.6 | 5.2 |
| **Non-Family Based Household** | | **10.1** | **15.1** | **19.0** | **5.7** | **7.5** | **10.1** | **5.9** | **7.9** | **11.7** | **9.2** | **13.5** | **17.0** |
| One-person | | 9.3 | 14.3 | 17.4 | 5.3 | 6.8 | 9.3 | 5.0 | 6.9 | 11.5 | 8.0 | 12.6 | 15.6 |
| Unrelated/Distantly related | | 0.8 | 0.8 | 1.6 | -* | 0.7 | 0.8 | 0.9 | 1.0 | -* | 1.2 | 0.9 | 1.4 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 702,366 | 773,953 | 829,360 | 113,489 | 132,029 | 153,769 | 78,759 | 88,151 | 90,629 | 13,885 | 1,013,542 | 1,091,340 |

** Values with high coefficient of variation (CV) were dropped. Others ethnic group were not shown due to high coefficient of variation (CV).*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding.*

### *Number of generations in family-based households*

Family-based households constituted 83.0% of all households, predominantly comprising two-generation families at 56.1%, followed by one-generation families at 19.4%, and three or more generation families at 7.6%, as shown in Table 3.8.

The share of households with two generations had persistently declined, dropping from 69.9% in 2003 to 56.1% in 2023/24. Conversely, the proportion of single-generation households had risen from 13.5% to 19.4% during the same period. Although there was an overall decline in family-based households, the percentage of households with three or more generations was comparable to five years ago (Table 3.8).

Table 3.8
HDB Households by Number of Generations and Year

| Number of Generations | | 2003 | 2008 | 2013 | 2018 | 2023/24 |
|---|---|---|---|---|---|---|
| **Family-Based Household** | | **91.3** | **90.9** | **90.8** | **86.6** | **83.0** |
| One generation | | 13.5 | 15.1 | 13.9 | 18.0 | 19.4 |
| Two generations | | 69.9 | 67.2 | 66.8 | 61.5 | 56.1 |
| Three or more generations | | 7.9 | 8.6 | 10.1 | 7.1 | 7.6 |
| **Non-Family Based Household** | | **8.7** | **9.2** | **9.2** | **13.5** | **17.0** |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N** | 821,126 | 866,026 | 908,499 | 1,013,542 | 1,091,340 |

*Note: Figures may not add up to 100.0% due to rounding*

### *Number of generations in family-based households by flat type*

A larger proportion of families with two or more generations resided in 4-room and bigger flat types. Conversely, there was a higher proportion of one-generation families in 1- and 2-room flats (Table 3.9).

In comparison to 2013, the proportion of one-generation families decreased for HDB rental flats but increased for all sold flat types. The proportion of two-generation families declined across all flat types. Similarly, there was a decrease in the proportion of families with three or more generations across all flat types, although there was an increase for 5-room and bigger flats compared with 2018.

### *Number of generations in family-based households by ethnic group of owner/registered tenant*

Two-generation families remained the predominant type of family-based household across the different ethnic groups. There were proportionally more two-generation families among minority ethnic groups, as shown in Table 3.10.

Compared with 2013, the proportion of one-generation families increased across all ethnic groups. Except for the Others ethnic group, Chinese, Malay, and Indian households experienced a general decline in the proportion of two-generation and three-or-more generation families, although there was a slight increase in three-or-more generation families among Chinese and Indian households compared with 2018 (Table 3.10).

Table 3.9
HDB Households by Number of Generations, Flat Type and Year

| Number of Generations | | Rental | | | 1- & 2-Room | | | 3-Room | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **68.5** | **65.2** | **58.4** | **60.6** | **60.6** | **42.0** | **80.0** | **74.0** | **68.3** |
| One generation | | 18.4 | 17.5 | 15.7 | 23.6 | 29.4 | 25.6 | 18.2 | 21.7 | 21.1 |
| Two generations | | 46.5 | 44.8 | 41.0 | 35.3 | 29.4 | 15.4 | 55.4 | 47.7 | 42.7 |
| Three or more generations | | 3.6 | 2.8 | 1.7 | -* | 1.8 | -* | 6.4 | 4.6 | 4.5 |
| **Non-Family Based Household** | | **31.5** | **34.8** | **41.6** | **39.4** | **39.4** | **58.0** | **20.0** | **26.0** | **31.7** |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 49,162 | 50,345 | 53,454 | 9,662 | 24,674 | 44,204 | 216,116 | 232,052 | 242,586 |

| Number of Generations | | 4-Room | | | 5-Room & Bigger | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **95.7** | **91.0** | **90.2** | **98.0** | **95.8** | **94.3** | **90.8** | **86.6** | **83.0** |
| One generation | | 13.0 | 16.9 | 20.4 | 10.6 | 15.8 | 16.3 | 13.9 | 18.0 | 19.4 |
| Two generations | | 71.3 | 66.5 | 62.3 | 74.7 | 70.7 | 65.9 | 66.8 | 61.5 | 56.1 |
| Three or more generations | | 11.4 | 7.6 | 7.5 | 12.7 | 9.3 | 12.1 | 10.1 | 7.1 | 7.6 |
| **Non-Family Based Household** | | **4.3** | **9.0** | **9.8** | **2.0** | **4.2** | **5.7** | **9.2** | **13.5** | **17.0** |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 354,526 | 405,163 | 437,978 | 279,033 | 301,308 | 313,118 | 908,499 | 1,013,542 | 1,091,340 |

** Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

Table 3.10
HDB Households by Number of Generations, Ethnic Group of Owner/Registered Tenant and Year

| Number of Generations | | Chinese | | | Malay | | | Indian | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **89.9** | **84.8** | **81.0** | **94.3** | **92.5** | **89.9** | **94.1** | **92.1** | **88.3** |
| One Generation | | 15.2 | 19.2 | 20.1 | 7.2 | 14.4 | 17.1 | 12.4 | 14.4 | 17.7 |
| Two Generations | | 65.5 | 59.4 | 54.0 | 71.5 | 65.6 | 62.0 | 71.4 | 70.9 | 61.8 |
| Three or More Generations | | 9.2 | 6.2 | 7.0 | 15.6 | 12.5 | 10.8 | 10.3 | 6.8 | 8.8 |
| **Non-Family Based Household** | | **10.1** | **15.2** | **19.0** | **5.7** | **7.5** | **10.1** | **5.9** | **7.9** | **11.7** |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 702,366 | 773,953 | 829,360 | 113,489 | 132,029 | 153,769 | 78,759 | 88,151 | 90,629 |

| Number of Generations | | Others | | | All | | |
|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **Family-Based Household** | | **94.7** | **88.6** | **91.5** | **90.8** | **86.6** | **83.0** |
| One Generation | | 14.3 | 11.6 | 16.5 | 13.9 | 18.0 | 19.4 |
| Two Generations | | 71.4 | 71.3 | 72.4 | 66.8 | 61.5 | 56.1 |
| Three or More Generations | | 9.0 | 5.7 | -* | 10.1 | 7.1 | 7.6 |
| **Non-Family Based Household** | | **5.3** | **11.4** | **8.5** | **9.2** | **13.5** | **17.0** |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 13,885 | 19,409 | 17,582 | 908,499 | 1,013,542 | 1,091,340 |

**   Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

### *One-person households*

Non-family based households represented 17.0% of all HDB households in 2023/24, nearly doubling from 8.7% in 2003 (Table 3.4). This increase was primarily due to the rising proportion of one-person households, which grew from 7.1% in 2003 to 15.6% in 2023/24.

In 2023/24, almost three-quarters of one-person households were aged 55 years and above (Table 3.11). Chinese households were prominently represented in this category, accounting for 84.7%. Nearly half of these households comprised singles (49.0%), followed by widowed individuals (25.8%) and divorced/separated individuals (21.5%). Furthermore, females made up more than six in ten (62.6%) of these households. Slightly less than six in ten (57.8%) were in the labour force. Although there were slight changes, these proportions remained relatively stable since 2013.

Majority of the one-person households lived in 3-room and bigger flats. The proportion of one-person households residing in 1- and 2-room sold flats increased significantly from 4.8% to 14.3% over the past ten years. This change could be attributed to the enhanced availability of 2-room Flexi flats, which provided viable housing options for singles. In contrast, the proportion of these households living in rental and 3-room flats declined over the same period.

Table 3.11
Attributes of One-Person Households

| Attributes | | 2013 | | 2018 | | 2023/24 | |
|---|---|---|---|---|---|---|---|
| **Age Group (Years)** | Below 35 | -* | | 2.5 | | -* | |
| | 35 – 44 | 12.7 | | 7.4 | | 8.9 | |
| | 45 – 54 | 21.4 | | 16.7 | | 17.1 | |
| | 55 – 64 | 30.2 | 65.1 | 27.1 | 73.4 | 23.9 | 73.4 |
| | 65 & Above | 34.9 | | 46.3 | | 49.5 | |
| **Ethnic Group** | Chinese | 86.1 | | 86.8 | | 84.7 | |
| | Malay | 7.9 | | 7.1 | | 8.3 | |
| | Indian | 5.2 | | 4.8 | | 5.0 | |
| | Others | 0.9 | | 1.4 | | 2.1 | |
| **Marital Status** | Single | 54.2 | | 45.3 | | 49.0 | |
| | Married | 1.9 | | 2.6 | | 3.7 | |
| | Widowed | 25.1 | | 30.8 | | 25.8 | |
| | Divorced/ Separated | 18.8 | | 21.3 | | 21.5 | |
| **Sex** | Female | 59.2 | | 62.6 | | 62.6 | |
| | Male | 40.8 | | 37.4 | | 37.4 | |
| **Labour Force Status** | In Labour Force | 61.3 | | 58.3 | | 57.8 | |
| | Outside Labour Force | 38.7 | | 41.7 | | 42.2 | |
| **Flat Type** | Rental | 15.3 | | 10.6 | | 11.5 | |
| | 1- & 2-Room | 4.8 | | 7.5 | | 14.3 | |
| | 3-Room | 54.4 | | 45.2 | | 42.8 | |
| | 4-Room | 18.2 | | 27.7 | | 22.8 | |
| | 5-Room & Bigger | 7.3 | | 9.1 | | 8.6 | |
| **Total** | **%** | 100.0 | | 100.0 | | 100.0 | |
| | **N**** | 76,119 | | 127,731 | | 169,990 | |

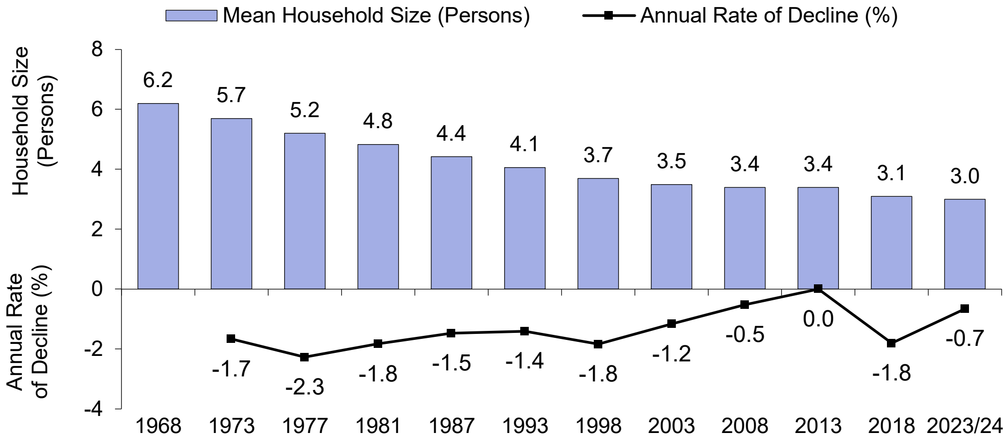
** Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases. N for Labour Force Status was 169,792.*

*Note: Figures may not add up to 100.0% due to rounding*

### *Household size*

The average household size, excluding foreign domestic workers and tenants, had been declining since 1968. In 2023/24, households had an average of 3.0 persons, decreasing at an annualised rate of 0.7% from 2018 (Chart 3.4). Overall, about 11.1% of HDB households had at least one foreign domestic worker. When including foreign domestic workers but excluding tenants, the average household size was 3.1 persons in 2023/24, consistent with the national-level figure reported by DOS[9] (3.1 persons).

Chart 3.4
Mean HDB Household Size by Year




*Note: Excluding foreign domestic workers and tenants*

Slightly over a quarter of HDB households (27.3%) comprised two persons (Table 3.12). This was followed by households of three persons (22.6%) and four persons (20.6%). Over the past decade, the proportion of households with fewer than three persons had increased, while the proportion of households with three or more persons had decreased. This decrease could be attributed to the general decline in the proportion of family-based households.

9 Resident Households by Household Size. Department of Statistics, Ministry of Trade & Industry, Republic of Singapore. Retrieved March 20, 2025 (https://tablebuilder.singstat.gov.sg/table/TS/M810371).

### *Household size by flat type and ethnic group of owner/registered tenant*

Household size increased with the size of flats. The average household size was the lowest in 1- and 2-room flats at 1.6 persons, due to the higher proportion of one-person households. This was followed by an average of 2.3 persons in HDB rental flats and 2.4 persons in 3-room flats (Table 3.13). Compared with 2013, the average household size decreased for almost all flat types, with the largest decline in 1- and 2-room flats.

While the overall average household size was 3.0 persons, non-Chinese households typically had larger families, with Malay households having the largest average household size of 3.5 persons in 2023/24 (Table 3.13). In contrast, Chinese households had the smallest average household size at 2.8 persons. Compared with 2013, the average household size decreased across all ethnic groups, with Malay households experiencing a significant decline from 4.2 persons in 2013 to 3.5 persons in 2023/24.

### *Household size by type of family nucleus*

Multi-nuclear families had the largest average household size of 5.7 persons, followed by extended nuclear families with an average of 4.4 persons (Table 3.14). Since 2013, the average household size had shown gradual changes across different family types. Smaller nuclear families with two persons increased, while those with three persons remained unchanged. The proportion of nuclear families with four or more persons and extended nuclear families with five or more persons both saw decreases in the past decade. The proportion of multi-nuclear families with six or more persons declined slightly. Non-family based households with two persons decreased from 8.4% in 2013 to 6.8% in 2023/24.

Table 3.12
HDB Households by Household Size, Flat Type and Year

| Household Size (Persons) | | Rental | | | 1- & 2-Room | | | 3-Room | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** |
| **1 Person** | | 23.6 | 26.8 | 36.4 | 37.9 | 38.8 | 55.2 | 19.2 | 24.8 | 29.9 |
| **2 Persons** | | 41.7 | 39.8 | 32.6 | 33.0 | 37.3 | 32.9 | 27.8 | 32.0 | 31.8 |
| **3 Persons** | | 20.0 | 15.8 | 14.0 | 15.9 | 13.5 | 7.4 | 23.6 | 21.7 | 20.5 |
| **4 Persons** | | 8.4 | 9.9 | 7.4 | -* | 6.1 | 3.0 | 18.8 | 13.8 | 10.9 |
| **5 Persons** | | 3.4 | 4.9 | 5.5 | -* | 2.2 | 1.5 | 6.9 | 4.7 | 5.0 |
| **6 or More Persons** | | 2.9 | 2.8 | 4.1 | -* | 2.1 | -* | 3.8 | 2.9 | 1.9 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 49,162 | 50,345 | 53,454 | 9,662 | 24,674 | 44,204 | 216,116 | 232,351 | 242,440 |
| **Mean** | | **2.4** | **2.4** | **2.3** | **2.2** | **2.0** | **1.6** | **2.8** | **2.5** | **2.4** |
| **Median** | | **1.6** | **1.6** | **1.4** | **1.4** | **1.3** | **1.0** | **2.1** | **1.8** | **1.6** |

**  Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

Table 3.12
HDB Households by Household Size, Flat Type and Year *(cont'd)*

| Household Size (Persons) | | 4-Room | | | 5-Room & Bigger | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **1 Person** | | 3.9 | 8.7 | 8.9 | 2.0 | 3.9 | 4.7 | 8.4 | 12.6 | 15.6 |
| **2 Persons** | | 18.3 | 23.5 | 28.0 | 13.1 | 20.4 | 21.1 | 20.4 | 25.7 | 27.3 |
| **3 Persons** | | 25.4 | 24.7 | 26.1 | 22.3 | 23.8 | 22.9 | 23.6 | 23.0 | 22.6 |
| **4 Persons** | | 29.2 | 27.3 | 23.4 | 33.6 | 30.0 | 29.1 | 26.7 | 23.6 | 20.6 |
| **5 Persons** | | 14.9 | 10.9 | 9.5 | 18.9 | 14.4 | 13.6 | 13.5 | 10.0 | 9.2 |
| **6 or More Persons** | | 8.3 | 4.9 | 4.2 | 10.0 | 7.6 | 8.7 | 7.4 | 5.0 | 4.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 354,526 | 405,163 | 437,407 | 279,033 | 301,308 | 312,747 | 908,499 | 1,013,542 | 1,090,252 |
| **Mean** | | **3.6** | **3.3** | **3.1** | **3.9** | **3.6** | **3.6** | **3.4** | **3.1** | **3.0** |
| **Median** | | **3.1** | **2.7** | **2.5** | **3.4** | **3.1** | **3.0** | **2.9** | **2.5** | **2.3** |

**  Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

Table 3.13
HDB Households by Household Size, Ethnic Group of Owner/Registered Tenant and Year

| Household Size (Persons) | | Chinese | | | Malay | | | Indian | | | Others | | | All | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** | **2013** | **2018** | **2023/24** |
| **1 Person** | | 9.3 | 14.3 | 17.4 | 5.3 | 6.8 | 9.3 | 5.0 | 6.9 | 11.5 | 4.8 | 9.1 | -* | 8.4 | 12.6 | 15.6 |
| **2 Persons** | | 22.1 | 27.0 | 28.3 | 12.0 | 21.6 | 24.5 | 18.4 | 22.0 | 24.7 | 16.1 | 18.5 | 19.7 | 20.4 | 25.7 | 27.3 |
| **3 Persons** | | 24.7 | 24.0 | 23.1 | 18.4 | 18.3 | 20.2 | 21.8 | 21.8 | 20.7 | 25.1 | 21.4 | 29.6 | 23.6 | 23.0 | 22.6 |
| **4 Persons** | | 26.9 | 22.6 | 20.2 | 20.4 | 22.2 | 19.5 | 33.4 | 33.8 | 26.2 | 30.7 | 27.2 | 22.8 | 26.7 | 23.6 | 20.6 |
| **5 Persons** | | 12.1 | 8.7 | 8.0 | 21.7 | 16.4 | 14.1 | 13.6 | 9.8 | 11.2 | 13.6 | 19.8 | 12.2 | 13.5 | 10.0 | 9.2 |
| **6 or More Persons** | | 4.9 | 3.4 | 3.2 | 22.3 | 14.6 | 12.4 | 7.8 | 5.6 | 5.8 | 9.6 | 4.0 | 9.3 | 7.4 | 5.0 | 4.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 702,366 | 773,953 | 828,410 | 113,489 | 132,029 | 153,632 | 78,759 | 88,151 | 90,629 | 13,885 | 19,409 | 17,582 | 908,499 | 1,013,542 | 1,090,252 |
| **Mean** | | **3.3** | **3.0** | **2.8** | **4.2** | **3.7** | **3.5** | **3.6** | **3.4** | **3.2** | **3.7** | **3.4** | **3.4** | **3.4** | **3.1** | **3.0** |
| **Median** | | **2.8** | **2.4** | **2.2** | **3.7** | **3.1** | **2.8** | **3.1** | **3.0** | **2.7** | **3.1** | **3.0** | **2.8** | **2.9** | **2.5** | **2.3** |

** Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

Table 3.14
HDB Households by Household Size, Type of Family Nucleus and Year

| Household Size (Persons) | | Family-Based Household | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Nuclear Family | | | Extended Nuclear Family | | | Multi-Nuclear Family | | |
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **1 Person** | | - | - | - | - | - | - | - | - | - |
| **2 Persons** | | 25.7 | 32.9 | 36.2 | - | - | - | - | - | - |
| **3 Persons** | | 29.3 | 28.3 | 29.3 | 14.7 | 25.2 | 22.4 | - | - | - |
| **4 Persons** | | 29.9 | 27.4 | 24.5 | 31.0 | 27.5 | 33.7 | 20.9 | 25.6 | 18.4 |
| **5 Persons** | | 11.9 | 8.9 | 7.9 | 32.7 | 33.4 | 30.6 | 27.7 | 25.4 | 33.4 |
| **6 or More Persons** | | 3.2 | 2.5 | 2.1 | 21.6 | 13.9 | 13.4 | 51.4 | 49.0 | 48.2 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 693,950 | 765,874 | 787,248 | 75,114 | 64,901 | 61,512 | 56,072 | 46,374 | 56,299 |
| **Mean** | | **3.4** | **3.2** | **3.1** | **4.7** | **4.4** | **4.4** | **5.8** | **5.6** | **5.7** |
| **Median** | | **2.8** | **2.6** | **2.5** | **4.1** | **3.9** | **3.8** | **5.1** | **5.0** | **4.9** |

** Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

Table 3.14
HDB Households by Household Size, Type of Family Nucleus and Year *(cont'd)*

| Household Size (Persons) | | Non-Family Based Household | | | All | | |
|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| **1 Person** | | 91.3 | 93.6 | 91.7 | 8.4 | 12.6 | 15.6 |
| **2 Persons** | | 8.4 | 6.0 | 6.8 | 20.4 | 25.7 | 27.3 |
| **3 Persons** | | -* | -* | -* | 23.6 | 23.0 | 22.6 |
| **4 Persons** | | - | -* | -* | 26.7 | 23.6 | 20.6 |
| **5 Persons** | | - | - | -* | 13.5 | 10.0 | 9.2 |
| **6 or More Persons** | | - | - | -* | 7.4 | 5.0 | 4.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 83,364 | 136,393 | 185,193 | 908,499 | 1,013,542 | 1,090,252 |
| **Mean** | | **1.1** | **1.1** | **1.1** | **3.4** | **3.1** | **3.0** |
| **Median** | | **1.0** | **1.0** | **1.0** | **2.9** | **2.5** | **2.3** |

**  Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

### *Household size by town/estate*

Table 3.15 shows the average and median household size across different HDB towns/estates. Similar to past years, households in older towns/estates where the average age of blocks was above 30 years had smaller average household sizes, ranging from 2.4 to 3.0 persons. In contrast, younger towns where the average age of blocks was 30 years and below had larger household sizes, ranging from 2.9 to 3.5 persons. Compared with 2013, the average household size had decreased in all HDB towns/estates.

Table 3.15
Mean and Median HDB Household Size by Town/Estate and Year

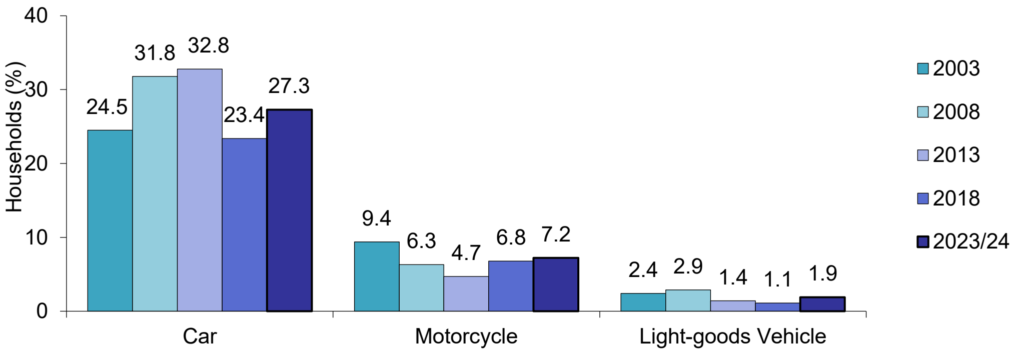
| Town/Estate | | Mean Household Size (Persons) | | | Median Household Size (Persons) | | |
|---|---|---|---|---|---|---|---|
| | | 2013 | 2018 | 2023/24 | 2013 | 2018 | 2023/24 |
| < 20 Years | Punggol | 3.5 | 3.2 | 3.2 | 3.0 | 2.7 | 2.6 |
| | Sembawang | 3.8 | 3.4 | 3.2 | 3.3 | 2.9 | 2.6 |
| | Sengkang | 3.6 | 3.3 | 3.2 | 3.1 | 2.9 | 2.6 |
| 20 - 30 Years | Bukit Batok | 3.5 | 3.2 | 2.9 | 3.0 | 2.5 | 2.3 |
| | Bukit Panjang | 3.9 | 3.4 | 3.2 | 3.3 | 2.7 | 2.7 |
| | Choa Chu Kang | 3.9 | 3.5 | 3.4 | 3.4 | 3.1 | 2.9 |
| | Hougang | 3.5 | 3.2 | 2.9 | 3.1 | 2.6 | 2.2 |
| | Jurong West | 3.6 | 3.3 | 3.3 | 3.1 | 2.7 | 2.7 |
| | Pasir Ris | 4.0 | 3.8 | 3.3 | 3.5 | 3.2 | 2.6 |
| | Tampines | 3.9 | 3.4 | 3.2 | 3.2 | 2.9 | 2.5 |
| | Woodlands | 4.0 | 3.6 | 3.5 | 3.3 | 3.1 | 2.9 |
| | Yishun | 3.6 | 3.2 | 2.9 | 3.1 | 2.6 | 2.2 |
| > 30 Years | Ang Mo Kio | 3.0 | 2.7 | 2.6 | 2.4 | 2.0 | 1.8 |
| | Bedok | 3.3 | 3.0 | 2.7 | 2.8 | 2.1 | 1.9 |
| | Bishan | 3.2 | 2.9 | 2.8 | 2.7 | 2.3 | 2.3 |
| | Bukit Merah | 3.0 | 2.7 | 2.5 | 2.3 | 2.0 | 1.8 |
| | Bukit Timah | 3.3 | 3.1 | 3.0 | 2.8 | 2.6 | 2.3 |
| | Central Area | 2.7 | 2.7 | 2.4 | 1.9 | 1.9 | 1.7 |
| | Clementi | 2.8 | 2.8 | 2.6 | 2.0 | 2.1 | 1.9 |
| | Geylang | 3.1 | 2.7 | 2.8 | 2.5 | 1.9 | 2.1 |
| | Jurong East | 3.4 | 3.0 | 3.0 | 3.0 | 2.4 | 2.3 |
| | Kallang/Whampoa | 3.0 | 2.6 | 2.5 | 2.4 | 1.8 | 1.8 |
| | Marine Parade | 2.9 | 2.5 | 2.5 | 2.2 | 1.8 | 1.8 |
| | Queenstown | 2.8 | 2.5 | 2.6 | 2.2 | 1.8 | 1.8 |
| | Serangoon | 3.5 | 3.0 | 2.8 | 3.0 | 2.4 | 2.1 |
| | Toa Payoh | 2.9 | 2.7 | 2.5 | 2.2 | 1.9 | 1.7 |
| **All** | | 3.4 | 3.1 | 3.0 | 2.9 | 2.5 | 2.3 |

## 3.3 Ownership of Motor Vehicles

Overall, the proportion of HDB households owning motor vehicles increased between 2018 and 2023/24, with the highest increase observed in the ownership of cars, from 23.4% in 2018 to 27.3% in 2023/24[10] (Chart 3.5). This increase in car ownership could be due to the rising affluence and aspirations of households, despite higher Certificate of Entitlement (COE) premiums compared with 2018[11].

However, when examining the trend over a decade, car ownership among HDB households decreased from 32.8% in 2013 to 27.3% in 2023/24. This decline could be a result of the Land Transport Authority's various measures in controlling the vehicle population, including providing more comprehensive public transport networks. The proportion of households owning motorcycles, however, saw an increase from 4.7% in 2013 to 7.2% in 2023/24. Ownership of light-goods vehicles increased slightly from 1.4% in 2013 to 1.9% in 2023/24.

Chart 3.5
Motor Vehicle Ownership by Year




### *By Attributes*

Car ownership is likely associated with the financial capability of the household. It was found to be higher among households living in sold flats compared with rental flats, and higher in 5-room and bigger flats compared with other flat types (Table

[10] Based on Household Expenditure Survey (HES), the proportion of resident households with cars in HDB dwellings increased from 26.0% to 27.2% while the proportion of resident households with motorcycles decreased from 8.5% to 8.1% between 2017/18 and 2023. Department of Statistics. Resident Households with Specified Consumer Durables/Services. Retrieved March 20, 2025 (https://tablebuilder.singstat.gov.sg/table/CT/18081).

[11] Land Transport Authority (LTA). COE Bidding Results/Prices. Retrieved August 4, 2025 (https://data.gov.sg/datasets/d_69b3380ad7e51aff3a7dcc84eba52b8a/view).

3.16). Car ownership was also found to be higher among younger households where the age of owner/registered tenant was below 55 years. Apart from financial capability, car ownership may also be influenced by specific family needs, as seen in the higher proportion of households with young (42.3%) and teenaged children (39.1%) owning cars. This was followed by households with married children (38.8%), of which six in ten were multi-generational households, comprising both children and seniors.

Table 3.16
Car Ownership by Attributes

| **Attributes** | | **Car Ownership** | | **Total** | |
|---|---|---|---|---|---|
| | | **Own** | **Do Not Own** | **%** | **N*** |
| **Flat Type** | Rental | 2.3 | 97.7 | 100.0 | 54,168 |
| | 1- & 2-Room | 7.4 | 92.6 | 100.0 | 44,693 |
| | 3-Room | 11.4 | 88.6 | 100.0 | 242,923 |
| | 4-Room | 27.7 | 72.3 | 100.0 | 441,020 |
| | 5-Room & Bigger | 46.0 | 54.0 | 100.0 | 315,970 |
| **Age Group** (Years)** | Below 35 | 36.8 | 63.2 | 100.0 | 65,153 |
| | 35 - 44 | 39.9 | 60.1 | 100.0 | 174,563 |
| | 45 - 54 | 33.0 | 67.0 | 100.0 | 241,086 |
| | 55 - 64 | 28.5 | 71.5 | 100.0 | 268,622 |
| | 65 & Above | 14.4 | 85.6 | 100.0 | 349,350 |
| **Household Life Cycle Stage** | Family without Children (couple aged below 55 years) | 33.6 | 66.4 | 100.0 | 60,663 |
| | Family with Young Children | 42.3 | 57.7 | 100.0 | 130,732 |
| | Family with Teenaged Children | 39.1 | 60.9 | 100.0 | 110,110 |
| | Family with Unmarried Grown-up Children | 27.7 | 72.3 | 100.0 | 314,602 |
| | Family with Married Children | 38.8 | 61.2 | 100.0 | 134,635 |
| | Young Senior/Senior Couple living Alone (at least one spouse aged 55 & above) | 16.0 | 84.0 | 100.0 | 137,353 |
| | Others*** | 8.8 | 91.2 | 100.0 | 203,006 |

** Excluding non-response cases*
*** Refers to age of Owner/Registered Tenant as of Jun 2023*
**** Includes non-family based households and siblings/other family members living together*

## 3.4 Summary of Findings

There were 1,099,742 HDB households in 2023, growing at an annualised rate of 1.6% since 2018. The majority (95.1%) of households lived in sold flats, with 4-room flats being the predominant flat type, followed by 5-room and bigger flats, and 3-room flats. The number of households living in sold 1- and 2-room flats significantly increased, mainly due to an increased provision of 2-room Flexi flats.

Tampines, Jurong West, and Sengkang housed the highest number of HDB households. Punggol, Tampines, and Bukit Batok experienced the largest increase in the number of households, due to the completion of new flats in these towns over the past five years.

Family-based households remained the most common type at 83.0%, although this percentage had decreased over time. On the other hand, non-family based households increased from 9.2% in 2013 to 17.0% in 2023/24, primarily due to the growth of one-person households, which had doubled over the last two decades. Additionally, there was an increase in one-generation households from 13.9% to 19.4% between 2013 and 2023/24, while two-generation family households decreased from 66.8% to 56.1% during the same period.

Almost three-quarters of one-person households were aged 55 years and above, with Chinese residents making up 84.7%. Nearly half were singles, and females constituted about two-thirds of them. The proportion of one-person households in 1- and 2-room flats increased significantly due to the availability of 2-room Flexi flats, while those in bigger flats decreased. The number of one-person households had surged over the past decade due to societal shifts like an ageing population and changing housing preferences, and this trend is expected to continue.

The average household size in HDB flats had been declining and was 3.0 persons in 2023/24. This decrease was largely due to a rise in smaller households and a drop in larger family-based households. Household size varied by flat type, ethnicity, and family type. The average household size was lowest in 1- and 2-room flats at 1.6 persons, highest among Malay households at 3.5 persons, and multi-nuclear families had the largest average household size at 5.7 persons.

Older towns/estates generally had smaller household sizes compared with younger ones.

The proportion of HDB households owning motor vehicles declined from 32.8% in 2013 to 27.3% in 2023/24, likely due to improved public transport network. Car ownership was higher among households living in sold flats, 5-room and bigger flats, younger households, and those with specific family needs such as young or teenaged children, and multi-generational households.

*Part 1 – Conclusion*

# Profile of HDB Resident Population and Households

*Part 1*

# Profile of HDB Resident Population and Households

## Conclusion

The profile of HDB communities continues to evolve in accordance with overall demographic trends and changing housing preferences. The number of HDB households had seen a significant increase. From 2013 to 2023, the growth rate of households surpassed that of the resident population, coupled with a decline in average household size. Younger families and singles, who might favour greater privacy and living space, have contributed to new household formations. This trend may be facilitated by the heightened supply of BTO flats from 2011 to 2014. It is crucial for HDB to carefully calibrate future housing policies, considering the constraints on land resources.

The impact of the ageing HDB population remains significant, with one in three residents aged 55 years and above, compared with less than one in four just a decade ago. The median age of residents rapidly increased from 38.6 years in 2013 to 42.8 years in 2023. This demographic shift necessitates more comprehensive planning for housing for the ageing population, encompassing elements such as the physical environment, amenities, caregiving support, and social assistance. One initiative addressing these needs is the Community Care Apartments (CCAs), which expands the continuum of housing-cum-care options for seniors. CCAs combine senior-friendly design features with customisable care services that adapt to evolving needs. These care services and social programs are designed to enable seniors to live independently within the community. In addition to CCAs, the Home Improvement Programme (HIP) and the Enhancement for Active Seniors (EASE) Programme have also been implemented to enhance the senior-friendliness of HDB homes. Rejuvenation opportunities and strategies will be regularly reviewed to address the evolving needs of seniors, including supporting their choice to age-in-place. Re-planning could assist in balancing the age distribution and alleviating the effects of an ageing population within HDB towns and estates.

In light of new household formations and an ageing population, the landscape of household composition is evolving. Although family-based households remained the predominant type, their proportion had declined over the years while non-family based households, mainly one-person households, were on the rise. The issue of seniors ageing alone, particularly those without family support, is a matter of concern. HDB's initiatives such as CCAs, HIP and EASE would benefit these seniors. The enhancements to the Proximity Housing Grant (PHG), including the latest PHG for singles living near parents, would provide support for families to live with or near one another. Additionally, policy reviews may focus on incentivising one-person households living in 3-room or bigger flats to right-size for improved retirement adequacy.

*Part 2*

# Housing Satisfaction and Preferences

*Part 2*

# Housing Satisfaction and Preferences

## Introduction

Understanding residents' housing preferences and aspirations is essential for HDB to adapt and evolve as Singapore's public housing authority. HDB residents reside in flats spread across 24 towns and three estates. Each town is designed to be self-sufficient, with easy access to shops, schools and social and recreational facilities. However, shifts in the population structure, such as a growing senior population, may influence the future provision of physical spaces.

As needs change, so too must the design and planning of public housing. More innovative solutions would need to be explored to ensure that towns remain highly liveable and sustainable. This section of the report evaluates residents' satisfaction with their living environment and the amenities available in HDB towns and estates, their usage of estate facilities, as well as their sense of pride in their flats. It also examines housing preferences through patterns of residential movement – both past trends and future intentions – and residents' housing aspirations. These insights provide valuable guidance for HDB as it continues to refine and update its offerings in public housing.

## Objectives

The objectives of Part 2 are as follows:

a) To determine residents' satisfaction with their physical living environment, sense of pride in their flat and whether they find their flat to be value for money;
b) To assess the HDB environment in terms of external (e.g., estate facilities, cleanliness of housing estate) and internal (e.g., flat design/layout) aspects of the living environment;
c) To examine residents' housing needs and preferences by looking at their past residential mobility, intention to move within the next five years and housing aspirations; and
d) To understand residents' preferred housing type for their old age.

## Framework

The HDB living experience is examined through drawing associations between housing satisfaction and housing preferences.

Housing satisfaction is assessed in terms of residents' satisfaction with their physical living environment which includes their flat, neighbourhood and estate facilities, as well as whether they consider their flat to be value for money and are proud of their flat.

Housing preferences are gauged from the patterns of residential mobility and residents' housing aspirations. The indicators of residential mobility include residents' length of residence, information on their previous move(s), as well as residents' intentions to move within the next five years. Housing aspirations are inferred from the housing types that residents are content with and their preferred housing types for old age.

This section has three chapters. Chapter 4 covers residents' satisfaction with their internal living environment (i.e., flat) and external living environment (i.e., neighbourhood), as well as their sentiments towards other aspects of the flat.

Chapter 5 examines residents' satisfaction with estate facilities and the usage patterns of these facilities. Housing preferences in terms of residential mobility and housing aspirations are discussed in Chapter 6.

# 4

# Satisfaction with Physical Living Environment

*Chapter 4*

# Satisfaction with Physical Living Environment

HDB is committed to providing a high-quality living environment by continually reviewing and adapting to the changing needs and preferences of its residents. This chapter examines residents' physical living experiences in terms of satisfaction with the flat, neighbourhood, and various aspects of the physical living environment (i.e., accessibility and connectivity, external and internal living environment). It also explores sentiments as reflected in how residents evaluate the physical living experience, measured in terms of their sense of pride in their flat and whether they perceive their flat as value for money.

## 4.1 Sense of Pride and Value for Money

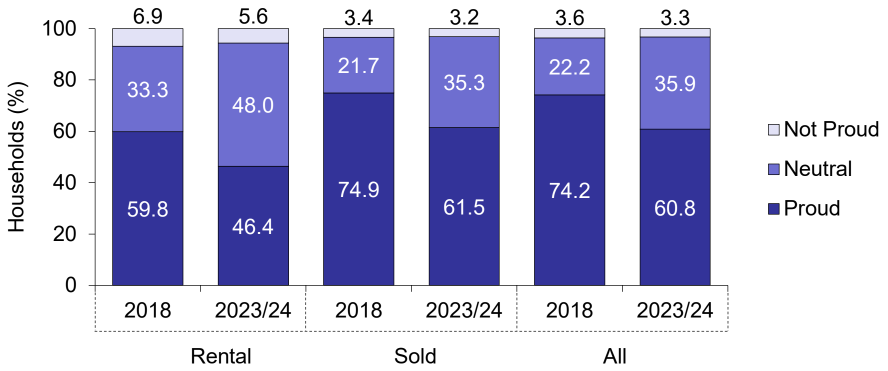
This section examines how residents perceive their flats – not just as homes to live in, but as spaces they feel proud of – and whether they believe their flats offer good value for money.

### *Majority proud of their flats, increasing sense of neutrality towards flat*

Overall, the majority (60.8%) of households were proud of their sold or rental flats (Chart 4.1). The proportion of households who were proud of their flat was higher among residents living in sold flats (61.5%) compared with rental flats (46.4%). The convenient location of the flat and adequate flat size were the main reasons for residents' pride in their flat. Additionally, homeowners also expressed pride in their achievement of owning a flat.

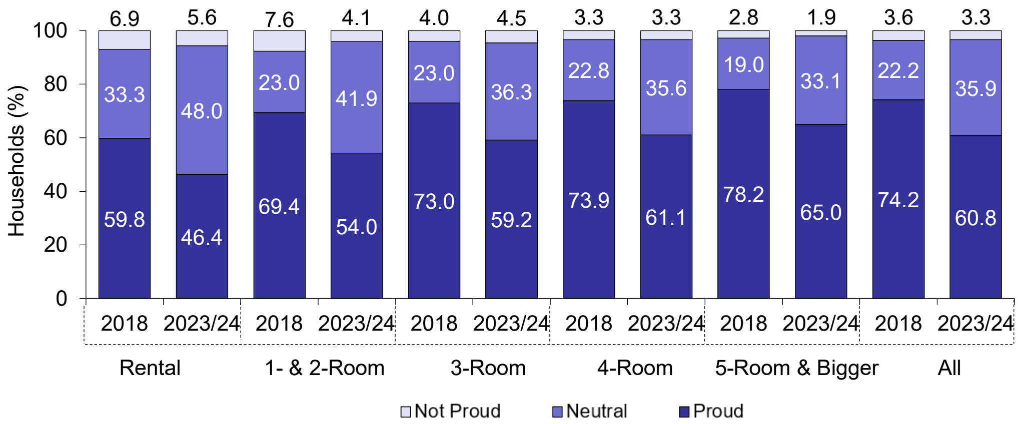
Meanwhile, the proportion of those who felt neutral (neither proud nor not proud) about their flat had increased by 13.7 percentage points to 35.9% compared with 2018. A smaller segment of households (3.3%) expressed that they were not proud of their flats. The main reason residents felt neutral or not proud of their flat was that many saw the flat as a basic necessity.

Chart 4.1
Sense of Pride in HDB Flat by Tenure and Year




Higher proportions of households living in sold 4-room and bigger flats were proud of their flat compared with those living in smaller flat types due to the adequate flat size (Chart 4.2). Across flat types, the convenient location of the flat stood out as the main reason for residents' pride in their flats, which could be due to the proximity to essential services and amenities.

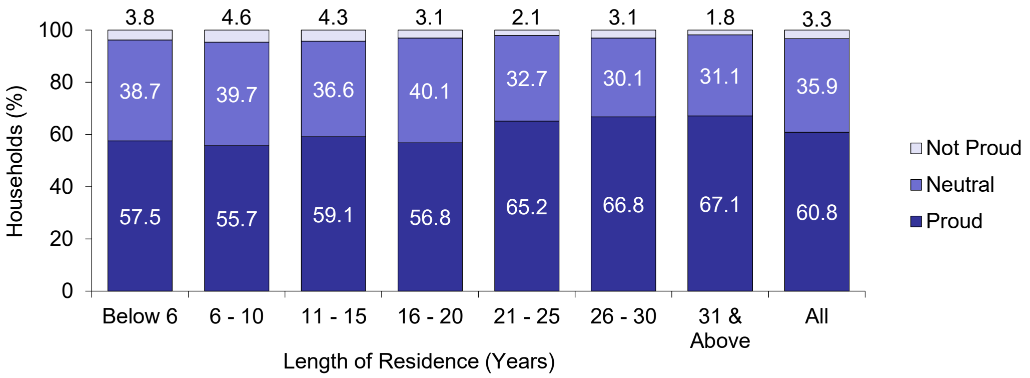
Chart 4.2
Sense of Pride in HDB Flat by Flat Type and Year



### *Higher likelihood of being proud of flat with longer length of residence*

Analysing sense of pride in the flat by length of residence showed that the proportion of households who were proud of their flat increased with length of residence. Sense of pride was highest (67.1%) among households who have lived in their current flat for more than 30 years (Chart 4.3). Across all lengths of residence, residents were mainly proud of their flat because of its convenient location. Those who have lived in their flat for more than 20 years were also more likely to find the size of their flat to be adequate, suggesting that these flats continued to meet their occupants' needs over time. Higher proportions of households who have lived in their flat for 20 years or less were neutral or not proud of their flat. These households expressed that they considered housing to be a basic necessity.

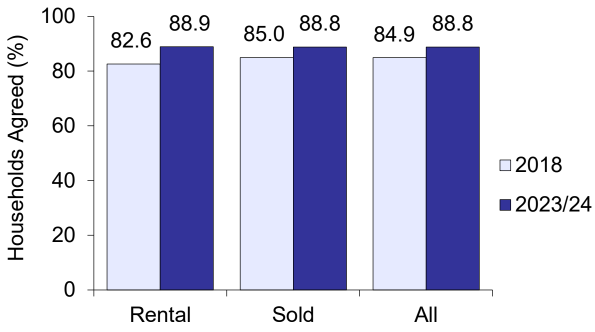
Chart 4.3
Sense of Pride in HDB Flat by Length of Residence




### *Rise in proportion who agreed that their flats were value for money*

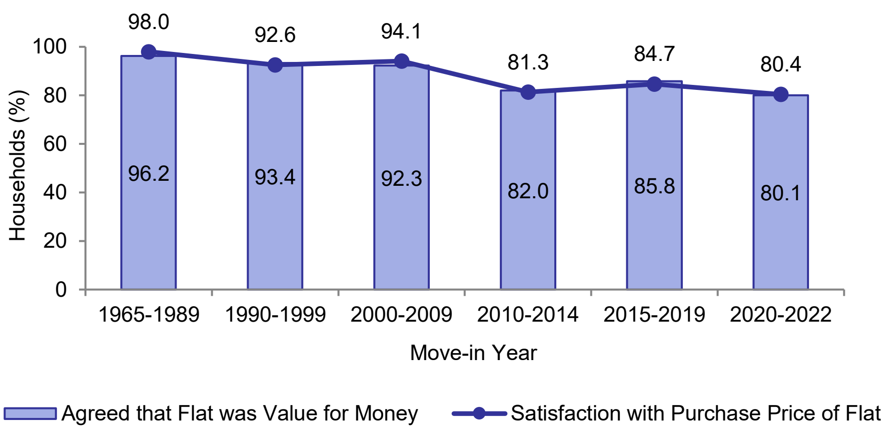
Overall, the proportion of households who agreed that their flat was value for money had increased compared with 2018 and was comparable for sold flats (88.8%) and rental flats (88.9%) (Chart 4.4). Households who resided in sold flats attributed their agreement to the affordable price of the flat at the point of purchase, proximity to public transport nodes, and appreciation in flat prices. Conversely, those who disagreed felt that there was no appreciation in flat value or that the purchase price of their resale flat was high.

Chart 4.4
Whether Flat was Value for Money by Tenure and Year




Homeowners' perception of whether the flat is value for money was also found to be associated with satisfaction with its purchase price (Chart 4.5). A higher proportion of those who had purchased their flats before 2010 agreed that their flat was value for money, with similar trends observed for satisfaction with the purchase price of the flat.

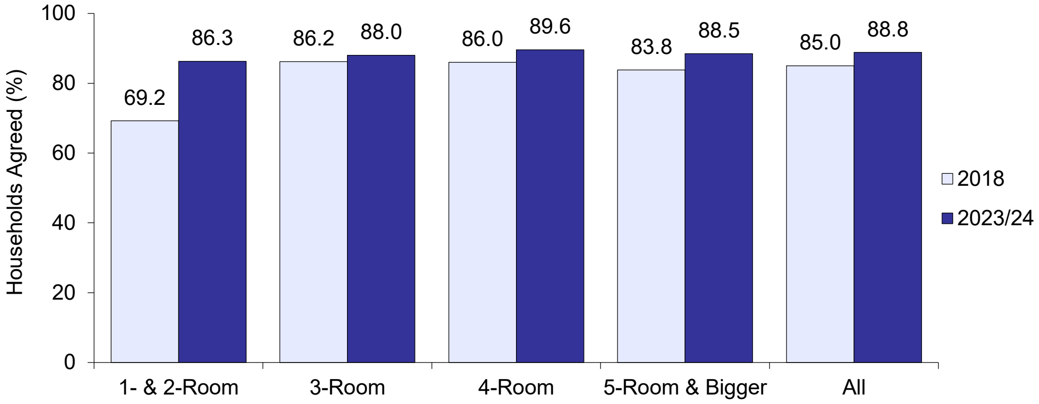
Chart 4.5
Whether Flat was Value for Money and Satisfaction with Purchase Price of Sold Flats by Move-in Year




*Note: Analysis based on homeowners*

There was an observed increase in the proportion of homeowners who agreed that their flats were value for money across all sold flat types. Homeowners living in 1- and 2-room flats who agreed had the largest increase in proportion by 17.1 percentage points compared with 2018 (Chart 4.6). The affordable price of the flat at the point of purchase was the main reason homeowners across all flat types agreed that their flat was value for money.

Chart 4.6
Whether Flat was Value for Money by Flat Type and Year (Sold Flats)




*Note: Analysis based on homeowners*

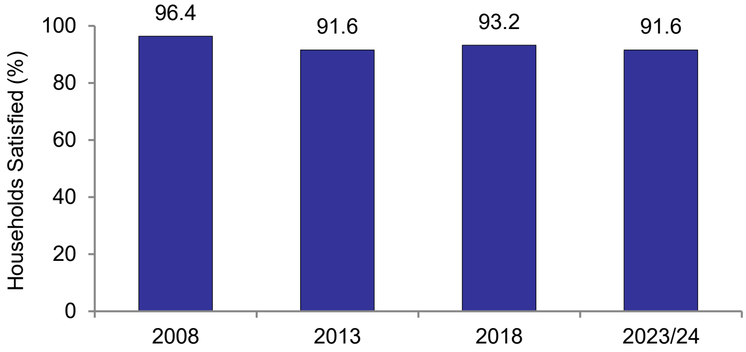
## 4.2 Satisfaction with Flat and Neighbourhood

Residents' satisfaction with their flats could be influenced by various factors including flat size, condition of the flat and flat design or layout. Similarly, factors such as location, cleanliness, and neighbourly relations could influence residents' satisfaction with their neighbourhoods. Taken together, both aspects contribute to residents' evaluation of the internal and external built environment.

### *High and sustained levels of satisfaction with flats*

Overall, 91.6% of households were satisfied with their flat (Chart 4.7), a slight decrease from 2018. The proportion of satisfied households have remained high at above 90% across the years.

Chart 4.7
Satisfaction with Flat by Year




Households who were satisfied with their flat cited reasons such as no major problems with the flat, adequate flat size for their needs and good natural ventilation in the flat. On the other hand, households who were dissatisfied with their flat mentioned having various problems within the flat such as spalling concrete and ceiling leaks, small flat size, and poor flat design or layout.

Over 90% of households across all sold flat types were satisfied with their flat (Table 4.1). A higher proportion of households living in 5-room and bigger flats were satisfied with their flat (94.1%), citing adequate flat size for their needs as the main reason. Households living in 1- to 3-room flats who were satisfied (90.0% to 90.5%) reported having no major problems with the flat.

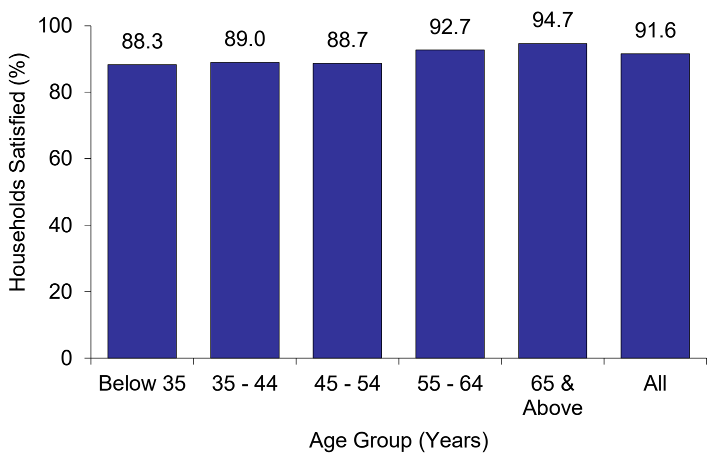
Table 4.1
Satisfaction with Flat by Flat Type and Year

| Flat Type | Households Satisfied (%) | |
|---|---|---|
| | 2018 | 2023/24 |
| **Rental** | 91.4 | 86.7 |
| **1- & 2-Room** | 88.4 | 90.5 |
| **3-Room** | 93.2 | 90.0 |
| **4-Room** | 92.8 | 91.4 |
| **5-Room & Bigger** | 94.3 | 94.1 |

Close to or more than 90% of households were satisfied with their flat regardless of various socio-economic attributes such as tenure of flat and age of residents. The proportion of households who were satisfied was higher among sold flat owners (91.9%) than rental tenants (86.7%). Both cited having no major problems with their flat as the main reason for satisfaction. Sold flat owners were more likely than rental tenants to find their flat size adequate for their needs.

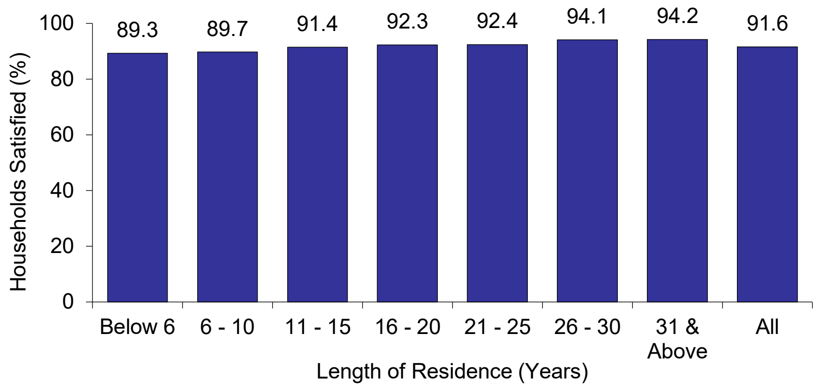
Analysis by age of residents revealed that a higher proportion of households aged 55 years and above were satisfied with their flat (92.7% to 94.7%) compared with other age groups (Chart 4.8). These households were more likely to find their present flat size adequate for their needs compared with other age groups.

Chart 4.8
Satisfaction with Flat by Age




Households who have lived in their flats for more than 25 years were also more likely to be satisfied with their flat (Chart 4.9). Besides having no major problems with their flat, a higher proportion of households who have been living in their flats for more than ten years felt that the size of their flat was adequate for their needs.

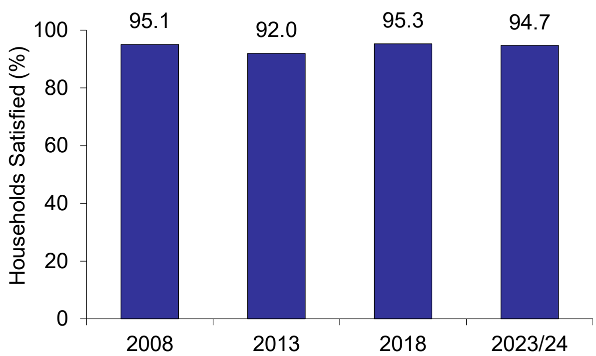
Chart 4.9
Satisfaction with Flat by Length of Residence




### *Majority satisfied with their neighbourhood*

The majority of households (94.7%) were satisfied with their neighbourhood (Chart 4.10). Households attributed their satisfaction to a pleasant and peaceful neighbourhood, good transportation networks and having friendly neighbours. The minority of households who were dissatisfied felt that their neighbourhood had cleanliness issues and that their neighbours were inconsiderate.

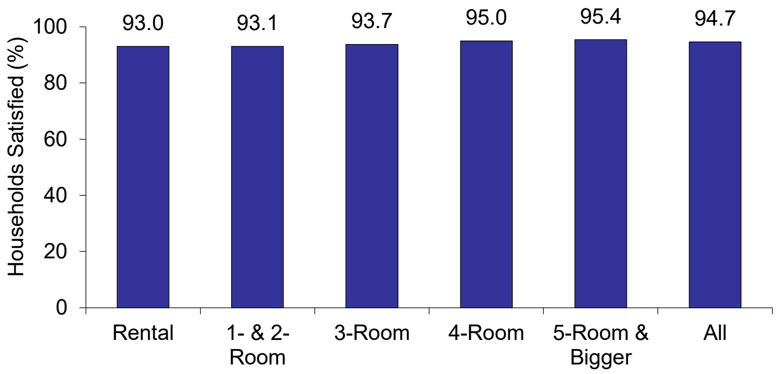
Chart 4.10
Satisfaction with Neighbourhood by Year




Across flat types, overall neighbourhood satisfaction was comparable in sold flats (93.1% to 95.4%) and rental flats (93.0%) (Chart 4.11). Households in 4-room and bigger flat types had higher proportions who were satisfied, largely due to a pleasant and peaceful neighbourhood and friendly neighbours. Dissatisfaction with the neighbourhood among households in rental flats and households in 1- to

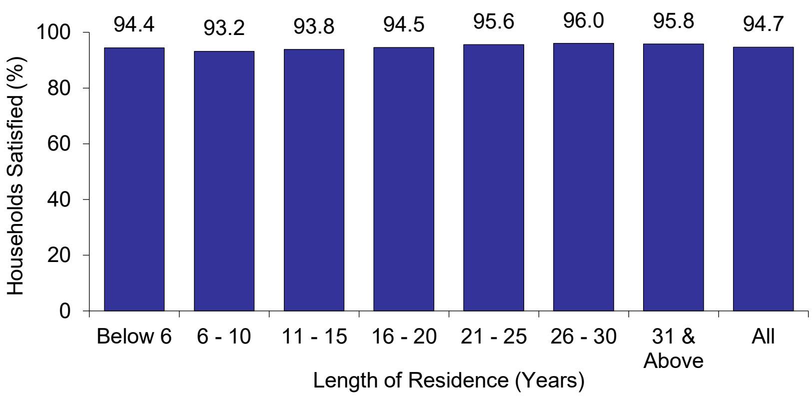
3-room sold flats was attributed to cleanliness issues, inconsiderate neighbours and noise from neighbours.

Chart 4.11
Satisfaction with Neighbourhood by Flat Type




Satisfaction with the neighbourhood was observed to be higher for households with over 20 years of residence (Chart 4.12). Households with a longer length of residence tended to comprise a higher proportion of senior households who mostly attributed their satisfaction to being served by good public transportation networks and having friendly neighbours. Most of these households lived in towns/estates that were above 30 years old, which might be indicative of more established public transport networks. Among households who have lived in their flat for ten years or less, a higher proportion was satisfied with the pleasant and peaceful neighbourhood.

Chart 4.12
Satisfaction with Neighbourhood by Length of Residence



***Greater sense of belonging among residents who were satisfied with neighbourhood***

Further analysis showed an association between residents' sense of belonging to their town/estate and satisfaction with their neighbourhood. Among households who were satisfied with their neighbourhood, majority felt a sense of belonging towards their towns/estates (97.9%) compared with those who were dissatisfied (85.3%), as shown in Table 4.2.

Table 4.2
Satisfaction with Neighbourhood among HDB Households by Sense of Belonging to Town/Estate

| Sense of Belonging to Town/Estate | | Satisfaction with Neighbourhood | |
|---|---|---|---|
| | | Satisfied | Dissatisfied |
| **Yes** | | 97.9 | 85.3 |
| **No** | | 2.1 | 14.7 |
| **Total** | **%** | 100.0 | 100.0 |
| | **N*** | 1,041,014 | 58,728 |

## 4.3 Satisfaction with HDB Physical Living Environment

This section examines various aspects of the HDB physical living environment. The aspects are classified into four main categories: accessibility and connectivity, external, internal, and other aspects (Table 4.3). Residents were asked about their satisfaction with each aspect and to provide a main reason for their dissatisfaction.

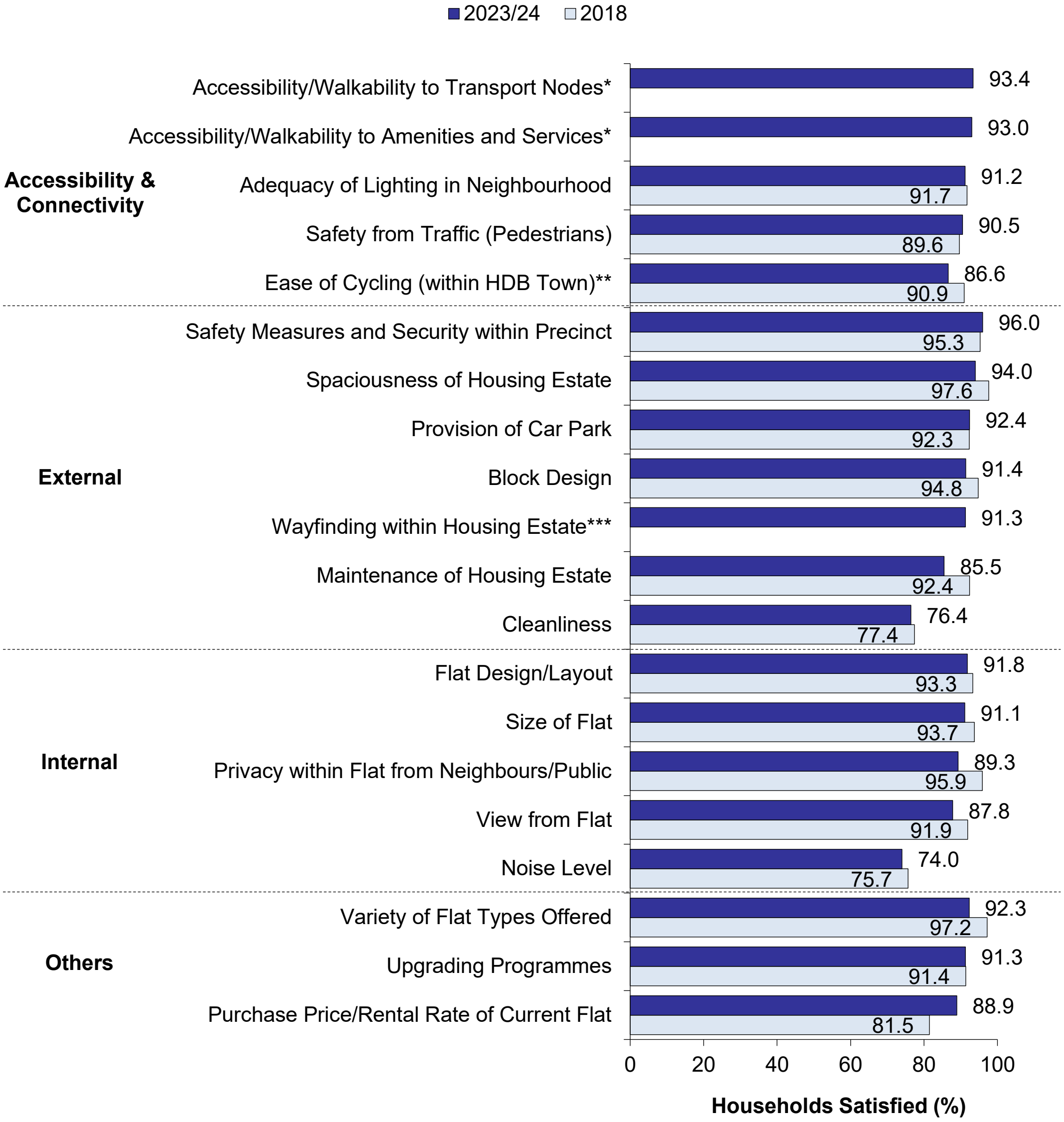
Table 4.3
Aspects of HDB Physical Living Environment

| Aspects | | |
|---|---|---|
| **Accessibility & Connectivity** | 1. | Accessibility/Walkability to Transport Nodes |
| | 2. | Accessibility/Walkability to Amenities and Services |
| | 3. | Adequacy of Lighting in Neighbourhood |
| | 4. | Safety from Traffic (Pedestrians) |
| | 5. | Ease of Cycling (within HDB town) |
| **External** | 6. | Provision of Car Park |
| | 7. | Block Design |
| | 8. | Cleanliness |
| | 9. | Maintenance of Housing Estate |
| | 10. | Spaciousness of Housing Estate |
| | 11. | Wayfinding within Housing Estate |
| | 12. | Safety Measures and Security within Precinct |
| **Internal** | 13. | Size of Flat |
| | 14. | Flat Design/Layout |
| | 15. | View from Flat |
| | 16. | Privacy within Flat from Neighbours/Public |
| | 17. | Noise Level |
| **Others** | 18. | Purchase Price/Rental Rate of Current Flat |
| | 19. | Variety of Flat Types Offered |
| | 20. | Upgrading Programmes |

### *Majority satisfied with various aspects of the physical living environment except for noise and cleanliness*

Overall, the majority of households were satisfied with most aspects of the HDB physical living environment (Chart 4.13). The aspects with the lowest satisfaction were cleanliness (76.4%) and noise level (74.0%). The main reasons for dissatisfaction with these aspects were irregular cleaning or poor cleanliness due to inconsiderate behaviours (e.g., littering, hoarding of common areas), and disturbances from neighbours and/or noise from the external environment (e.g., traffic/vehicles), respectively.

Chart 4.13
Satisfaction with Various Aspects of HDB Physical Living Environment

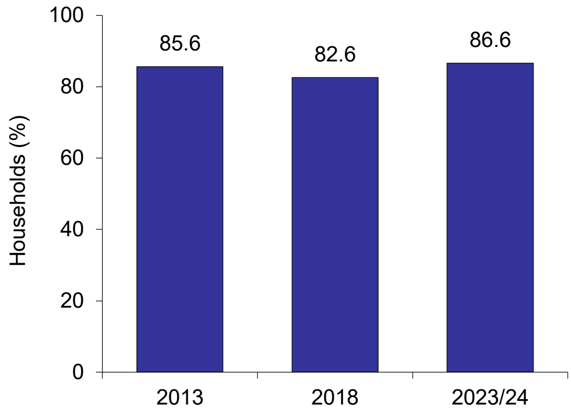



** Accessibility and walkability were asked as separate aspects in 2018 and were combined in 2023/24; findings were therefore not comparable*
*** Responses limited to those who cycled*
**** Wayfinding was a new aspect included in SHS 2023/24*

## *Increase in proportion of households who perceived lifts to be reliable*

Lift reliability is an important aspect of high-rise living. Perception of lift reliability improved from 82.6% in 2018 to 86.6% in 2023/24 (Chart 4.14). For the small proportion of households who were dissatisfied, frequent lift breakdowns were cited as the main reason.

Chart 4.14
Proportion of HDB Households who Perceived Lifts to be Reliable by Year




## 4.4 Work from Home/Remote Work

With the global shift towards flexible work arrangements catalysed by the COVID-19 pandemic, SHS 2023/24 explored a new topic on remote work and home-based learning (HBL) arrangements. Remote work refers to working away from the office, including working from home, at spaces within the precinct, cafes, private co-working spaces, working pods or booths and other public spaces.

### *Four in ten households worked remotely or participated in home-based learning*

About one in four (26.4%) homeowners and rental tenants have worked remotely in the past one year from the point of the survey. This proportion increased to 40.2% when household members who had worked remotely or participated in HBL in the same time frame were also included. Among these households, those living in sold flats were more likely to do so (41.9%) compared to rental households (7.9%) (Table 4.4). Those living in sold 4-room and bigger flats were also more likely to have worked remotely or participated in HBL.

Table 4.4
Proportion of HDB Households who Worked Remotely or Participated In Home-based Learning by Flat Type

| Flat Type | Households (%) | | Total | |
|---|---|---|---|---|
| | Remote work | No remote work | % | N* |
| **Rental** | 7.9 | 92.1 | 100.0 | 54,168 |
| **1- & 2-Room** | 13.2 | 86.8 | 100.0 | 44,693 |
| **3-Room** | 25.8 | 74.2 | 100.0 | 243,054 |
| **4-Room** | 44.0 | 56.0 | 100.0 | 441,425 |
| **5-Room & Bigger** | 55.3 | 44.7 | 100.0 | 316,402 |

** Excluding non-response cases*

### *Majority who worked remotely preferred working from home to other locations*

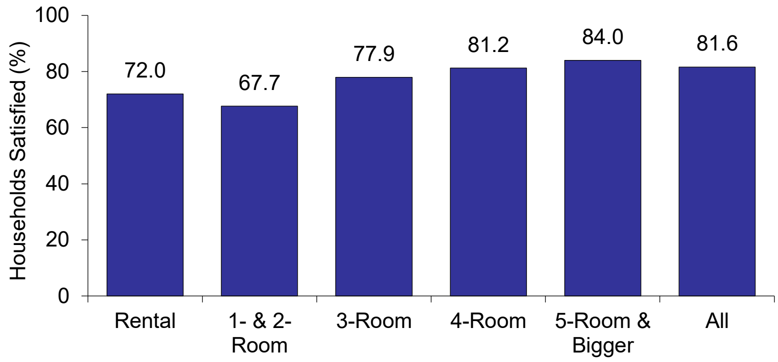
Among homeowners and rental tenants who worked remotely, the majority worked from home instead of at other locations such as libraries, cafes, or co-working spaces. Those who used these alternative spaces for remote work only made up a small percentage and were more likely to be rental tenants and homeowners living in 1- to 3-room sold flats. The main challenges faced when working at locations other than the home or office were a lack of infrastructural support (e.g., poor internet connection and limited charging points), a lack of privacy and personal space, and insufficient places available for remote work. Comfort, provision of basic infrastructure and amenities, and privacy were cited as the main considerations by homeowners and rental tenants for working at alternative spaces.

### *Majority satisfied with working or learning conditions at home*

The majority of households who worked remotely or practiced HBL were satisfied with the working or learning conditions at home (81.6%) (Chart 4.15). A peaceful environment at home with minimal noise, and time and money savings from avoiding crowds and commuting were cited as the main reasons for satisfaction. For those who were dissatisfied with the working or learning conditions at home (18.4%), the majority cited noise disruptions from external factors, such as construction activities and/or from neighbours.

Satisfaction with working or learning conditions at home differed across flat types. A higher proportion of households in sold flats (81.7%) were satisfied compared with rental households (72.0%). Among households in sold flats, a higher proportion of those in 4-room and bigger flats were satisfied with the working or learning conditions at home and were more likely to cite having a comfortable and conducive home environment or having sufficient space in the flat for a dedicated work area. Rental households were satisfied with the peaceful environment and better integration of work and family life with working/learning from home. The main reason for dissatisfaction was the limited space in the flat to allow for a conducive work-from-home setup.

Chart 4.15
Satisfaction with Work-from-home or Home-based Learning Conditions by Flat Type




## 4.5 Summary of Findings

About six in ten HDB households were proud of their flats. A higher proportion of those living in 4-room and bigger sold flats were more likely to be proud of their flat compared with other flat types. Households commonly attributed their sense of pride in their flat to the convenient location of the flat and adequate flat size. Homeowners also felt that it was an achievement to be able to own a flat.

Although the proportion of households who were proud of their flat has declined from 2018, the proportion of those who were not proud has remained low. Instead, an increase was observed in the proportion of those who felt neutral about their flat, from 22.2% in 2018 to 35.9% in 2023/24, as residents viewed the flat as a basic necessity.

Perception of the flat being value for money has improved, with the proportion of homeowners in agreement increasing from 85.0% in 2018 to 88.8% in 2023/24. The affordable flat price at the point of purchase, proximity to public transport nodes, and price appreciation were the top reasons cited among those who agreed. Those who disagreed felt that there was low appreciation of flat value, or that the price of the flat bought from the resale market was high.

Satisfaction with the flat (91.6%) and neighbourhood (94.7%) remained high at above 90%. The most common attributes associated with flat satisfaction were that there were no major problems with the flat, the flat size was adequate for the household's needs, and that the flat had good natural ventilation. In terms of related aspects of the internal living environment, such as flat size and flat design and layout, satisfaction maintained at above 90%. Noise continued to be an aspect with low satisfaction (74.0%) due to noise from neighbours and/or the external environment.

Most households were satisfied with the external aspects of the HDB physical living environment, including aspects on connectivity. Cleanliness continued to be an aspect with low satisfaction (76.4%). The main reasons for dissatisfaction were irregular cleaning or poor cleanliness due to inconsiderate behaviours (e.g., littering, hoarding of common areas).

For remote work arrangements, only about 4 in 10 households worked remotely or practiced home-based learning (HBL) in the past year from the point of the survey. Households living in sold 4-room or bigger flats were more likely to participate in such remote working/learning arrangements. The home was found to be the most preferred location when remote working/learning in comparison to alternative spaces such as working pods, cafes, libraries etc. Majority of the households who practiced remote working or learning were satisfied with the working/learning conditions at home (81.6%) as it offered a peaceful environment, time and money savings from not having to commute, and was comfortable and conducive.

# 5

# Satisfaction and Usage of Estate Facilities

*Chapter 5*

# Satisfaction and Usage of Estate Facilities

HDB towns are designed to be self-sufficient, offering a comprehensive range of facilities at three distinct levels: precinct, neighbourhood and town. With transforming demographics and an ever-changing social and economic climate, it is crucial to provide estate facilities that adapt to the evolving needs of households. By monitoring the satisfaction and usage levels of various facilities in HDB towns/estates, HDB can be better equipped to cater to households' needs and expectations.

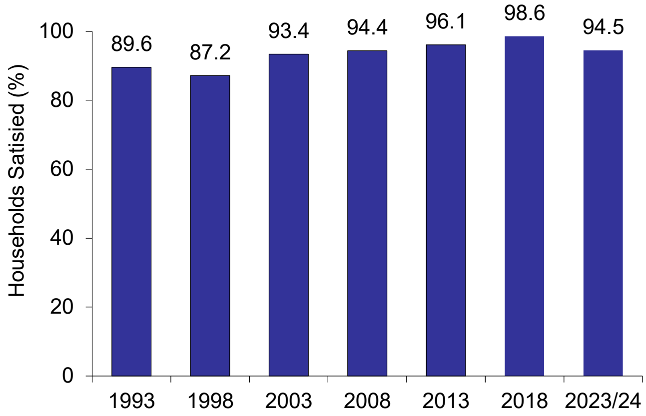
This chapter assesses the provision of estate facilities in terms of households' satisfaction with and usage levels of estate facilities, and places in the estate where residents usually spend their time. As the COVID-19 pandemic has accelerated the usage of e-commerce and the shift towards digital platforms, understanding the impact of online shopping and the popular categories of goods purchased online will be useful in determining the types of trade to be provided within HDB towns/estates.

## 5.1 Satisfaction with Estate Facilities

### *Overall satisfaction level with estate facilities remained high*

Overall satisfaction with the provision of estate facilities has consistently remained high, with satisfaction levels exceeding 90% throughout the last two decades (Chart 5.1).

Chart 5.1
Overall Satisfaction with Estate Facilities by Year




### *High satisfaction with various estate facilities albeit slight decline compared with 2018*

Satisfaction with various types of estate facilities remained high, ranging from 83.3% for benches/seats/tables to 96.1% for educational facilities (Table 5.1). Compared with 2018, however, satisfaction levels for most facilities have shown a slight decline, particularly for community, recreational and leisure, and eating facilities.

For community facilities, the satisfaction level among households declined from 97.3% in 2018 to 90.5% in 2023/24. Among the dissatisfied households (9.5%), some expressed concerns regarding the small size of the community centre or the limited activities offered, and the lack of community centres and police posts.

Table 5.1
Satisfaction with Types of Estate Facilities by Year

| Types of Estate Facilities | Households Satisfied (%) | | |
|---|---|---|---|
| | 2013 | 2018 | 2023/24 |
| **Commercial Facilities** | | | |
| **(i) General Retail Shops** | **93.4** | **97.9** | **93.5** |
| HDB shop/Neighbourhood centre | 89.9 | 94.8 | 89.6 |
| Shopping centre/mall | 90.8 | 96.3 | 92.2 |
| **(ii) Markets or Market-Produce Shops/Stalls** | **94.7** | **97.4** | **92.9** |
| Wet/Dry market | 85.4 | 89.8 | 84.1 |
| Supermarket | 94.1 | 96.3 | 92.5 |
| **(iii) Eating Facilities** | **92.4** | **96.2** | **90.1** |
| Hawker centre | 86.3 | 89.5 | 83.4 |
| Eating house/Coffee shop | 88.3 | 92.5 | 84.5 |
| Foodcourt | 89.1 | 93.5 | 81.6 |
| Other F&B outlet *(e.g., fast food, café, restaurant)* | N.A. | 97.1 | 90.7 |
| **Senior-Friendly Facilities*** | | | |
| Bench/Seat/Table | N.A. | 89.4 | 83.3 |
| Support hand bar in lift/along corridor | N.A. | 96.5 | 91.7 |
| Ramp | N.A. | 95.6 | 92.1 |
| Fitness station for seniors | N.A. | 95.1 | 89.1 |
| Senior citizens' corner | N.A. | 93.6 | 87.2 |
| **Playground** | N.A. | 94.7 | 90.8 |
| **Parks & Greenery** | N.A. | 95.9 | 92.0 |
| **Transportation Facilities** | 80.4 | 91.4 | 91.9 |
| **Sports Facilities** | 88.9 | 93.6 | 87.8 |
| **Recreational & Leisure Facilities** | 91.7 | 95.7 | 89.0 |
| **Precinct Facilities** | 86.7 | 94.2 | 89.6 |
| **Community Facilities** | 94.6 | 97.3 | 90.5 |
| **Education Facilities** | 95.0 | 97.7 | 96.1 |
| **Health/Medical Facilities** | 85.7 | 93.9 | 93.6 |
| **Financial Facilities** | 86.7 | 90.0 | 86.6 |
| **Postal Facilities** | N.A. | N.A. | 90.7 |
| **Overall Satisfaction** | 96.1 | 98.6 | 94.5 |

* *Prior to SHS 2018, questions on satisfaction with senior-friendly facilities were posed to residents aged 55 years and above only (Chapter 5, Section 5.4, Table 5.42, Monograph on Public Housing in Singapore: Social Well-Being of HDB Communities and Well-Being of Seniors and Singles (Occupiers))*

For recreational and leisure facilities, the proportion of households who were satisfied decreased from 95.7% in 2018 to 89.0% in 2023/24. Those who were dissatisfied cited a lack of cinemas as the main reason. This could be due to the closure of cinemas following the decline in cinema attendance after the COVID-19 pandemic, coupled with changing consumption habits due to streaming services[12].

For eating facilities, the proportion of households who were satisfied decreased from 96.2% in 2018 to 90.1% in 2023/24. Eating facilities were further classified into four sub-categories, namely, foodcourts, eating houses/coffee shops, hawker centres and other food & beverage (F&B) outlets. Satisfaction levels for foodcourts registered the highest decline (from 93.5% in 2018 to 81.6% in 2023/24), followed by eating houses/coffee shops (from 92.5% in 2018 to 84.5% in 2023/24), other F&B outlets (from 97.1% in 2018 to 90.7% in 2023/24), and hawker centres (from 89.5% in 2018 to 83.4% in 2023/24) (Table 5.1). The common reasons for dissatisfaction across these four sub-categories were that the food was perceived to be too expensive or not affordable, and there was a desire for a wider variety or greater choice of food.

### *Satisfaction with various estate facilities comparable across all flat types*

Overall satisfaction levels with estate facilities were high across all flat types, with at least nine in ten households having expressed satisfaction (Table 5.2). Satisfaction levels with the various types of estate facilities were also largely comparable across flat types though it was observed that households living in 5-room and bigger flats tended to be less satisfied with the various types of estate facilities. Specifically, a lower proportion of these households were satisfied with wet/dry markets, various eating facilities, benches/seats/tables, as well as senior citizens' corners. For wet/dry markets, hawker centres, eating houses/coffee-shops and foodcourts, the lack of variety of stalls or food options was a main reason for dissatisfaction. Residents also wished to see more of hawker centres, benches/seats/tables and senior citizens corners.

[12] Yeoh, Grace. 2024. "Why Are Fewer Singaporeans Going to the Cinema? It's Not about Cost but Value." CNA Lifestyle. Retrieved February 17, 2025. (https://cnalifestyle.channelnewsasia.com/entertainment/singaporeans-movies-cathay-cineplexes-amk-hub-392221).

Table 5.2
Satisfaction with Types of Estate Facilities by Flat Type

| Types of Estate Facilities | Households Satisfied (%) | | | | | |
|---|---|---|---|---|---|---|
| | Rental | 1- & 2-Room | 3-Room | 4-Room | 5-Room & Bigger | All |
| **Commercial Facilities** | | | | | | |
| **(i) General Retail Shops** | **95.1** | **93.7** | **94.2** | **93.8** | **92.2** | **93.5** |
| HDB shop/Neighbourhood centre | 94.6 | 89.1 | 91.4 | 89.6 | 87.6 | 89.6 |
| Shopping centre/mall | 92.3 | 92.4 | 92.1 | 92.5 | 91.7 | 92.2 |
| **(ii) Markets or Market-Produce Shops/Stalls** | **93.7** | **94.4** | **93.9** | **93.4** | **91.1** | **92.9** |
| Wet/Dry market | 87.4 | 83.0 | 87.6 | 84.4 | 80.7 | 84.1 |
| Supermarket | 92.8 | 93.9 | 92.4 | 93.1 | 91.7 | 92.5 |
| **(iii) Eating Facilities** | **93.2** | **90.7** | **91.8** | **90.2** | **88.1** | **90.1** |
| Hawker centre | 87.6 | 84.2 | 86.6 | 82.1 | 81.8 | 83.4 |
| Eating house/Coffee shop | 89.7 | 85.7 | 87.2 | 83.8 | 82.5 | 84.5 |
| Foodcourt | 84.8 | 81.9 | 82.8 | 81.6 | 80.0 | 81.6 |
| Other F&B outlets *(e.g., fast food, café, restaurant)* | 89.8 | 90.6 | 90.6 | 90.9 | 90.5 | 90.7 |
| **Senior-Friendly Facilities** | | | | | | |
| Bench/Seat/Table | 88.1 | 88.7 | 86.7 | 82.1 | 80.6 | 83.3 |
| Support hand bar in lift/along corridor | 94.0 | 93.2 | 91.0 | 92.2 | 90.9 | 91.7 |
| Ramp | 95.3 | 94.2 | 91.4 | 92.4 | 91.2 | 92.1 |
| Fitness station for seniors | 93.3 | 93.4 | 89.1 | 89.7 | 87.0 | 89.1 |
| Senior citizens' corner | 91.4 | 90.7 | 88.9 | 87.9 | 83.8 | 87.2 |
| **Playground** | 94.4 | 95.1 | 92.2 | 90.2 | 89.6 | 90.8 |
| **Parks & Greenery** | 94.4 | 96.7 | 92.3 | 91.8 | 90.9 | 92.0 |
| **Transportation Facilities** | 96.3 | 88.9 | 94.0 | 91.2 | 91.1 | 91.9 |
| **Sports Facilities** | 93.5 | 90.6 | 88.9 | 87.3 | 86.3 | 87.8 |
| **Recreational & Leisure Facilities** | 92.6 | 92.6 | 89.3 | 88.9 | 87.6 | 89.0 |
| **Precinct Facilities** | 95.2 | 94.7 | 89.9 | 89.7 | 87.6 | 89.6 |
| **Community Facilities** | 96.7 | 93.1 | 90.6 | 90.1 | 89.6 | 90.5 |
| **Education Facilities** | 97.2 | 97.7 | 97.1 | 95.8 | 95.4 | 96.1 |
| **Health/Medical Facilities** | 96.5 | 93.8 | 94.7 | 93.4 | 92.5 | 93.6 |
| **Financial Facilities** | 91.2 | 83.3 | 89.3 | 85.6 | 85.7 | 86.6 |
| **Postal Facilities** | 93.2 | 85.0 | 92.5 | 90.3 | 90.3 | 90.7 |
| **Overall Satisfaction** | 96.8 | 94.9 | 95.1 | 94.4 | 93.7 | 94.5 |

### *Families with young children less satisfied with foodcourts, hawker centres, wet/dry markets, eating houses/coffee shops and playgrounds*

Families without children and families with young children expressed lower satisfaction levels with various estate facilities (Table 5.3).

For families without children, satisfaction levels were lower for foodcourts (75.2%), wet/dry markets (76.9%), sports facilities (78.3%), financial facilities (79.0%) and eating houses/coffee shops (79.6%). For foodcourts, wet/dry markets and eating houses/coffee shops, residents cited the lack of variety of stalls or food options as their main reason for dissatisfaction. For wet/dry markets, sports facilities and financial facilities, residents wished to have more of such facilities.

For families with young children, satisfaction levels were lower for foodcourts (77.5%), hawker centres (77.8%), wet/dry markets (78.8%), eating houses/coffee shops (78.9%) and playgrounds (79.6%). For foodcourts and eating houses/coffee shops, the common reasons for dissatisfaction were high food prices and a lack of variety. For hawker centres, wet/dry markets and playgrounds, common reasons for dissatisfaction were a lack of variety and residents wanted more of such facilities.

Table 5.3
Satisfaction with Types of Estate Facilities by Household Life Cycle Stage

| Types of Estate Facilities | Households Satisfied (%) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Family without Children | Family with Young Children | Family with Teenaged Children | Family with Unmarried Grown-up Children | Family with Married Children | Young Senior/Senior Couple Living Alone | Others* | All |
| **Commercial Facilities** | | | | | | | | |
| **(i) General Retail Shops** | **93.2** | **90.1** | **93.4** | **93.1** | **95.0** | **95.8** | **93.8** | **93.5** |
| HDB shop/Neighbourhood centre | 85.5 | 84.5 | 89.8 | 89.6 | 91.1 | 92.6 | 91.5 | 89.6 |
| Shopping centre/mall | 91.6 | 90.7 | 93.1 | 92.2 | 93.3 | 93.5 | 91.0 | 92.2 |
| **(ii) Markets or Market-Produce Shops/Stalls** | **89.8** | **91.3** | **92.2** | **92.1** | **94.1** | **95.3** | **94.1** | **92.9** |
| Wet/Dry market | 76.9 | 78.8 | 83.9 | 84.6 | 85.2 | 85.7 | 87.9 | 84.1 |
| Supermarket | 89.0 | 91.0 | 93.1 | 92.2 | 93.3 | 93.7 | 93.6 | 92.5 |
| **(iii) Eating Facilities** | **86.2** | **86.6** | **88.2** | **91.2** | **91.6** | **91.1** | **91.1** | **90.1** |
| Hawker centre | 80.7 | 77.8 | 80.4 | 84.5 | 83.2 | 87.5 | 85.1 | 83.4 |
| Eating house/Coffee shop | 79.6 | 78.9 | 82.1 | 85.4 | 85.1 | 88.9 | 86.4 | 84.5 |
| Foodcourt | 75.2 | 77.5 | 79.2 | 83.2 | 81.6 | 84.0 | 83.3 | 81.6 |
| Other F&B outlet *(e.g., fast food, café, restaurant)* | 87.7 | 89.0 | 89.5 | 92.8 | 91.5 | 91.4 | 89.0 | 90.7 |

** Including non-family based households and siblings/other family members living together*

Table 5.3
Satisfaction with Types of Estate Facilities by Household Life Cycle Stage (cont'd)

| Types of Estate Facilities | Households Satisfied (%) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Family without Children** | **Family with Young Children** | **Family with Teenaged Children** | **Family with Unmarried Grown-up Children** | **Family with Married Children** | **Young Senior/Senior Couple Living Alone** | **Others*** | **All** |
| **Senior-Friendly Facilities** | | | | | | | | |
| Bench/Seat/Table | 81.3 | 80.7 | 81.0 | 82.7 | 79.2 | 86.8 | 87.9 | 83.3 |
| Support hand bar in lift/along corridor | 92.0 | 92.0 | 93.4 | 90.0 | 90.3 | 93.0 | 93.2 | 91.7 |
| Ramp | 94.4 | 90.5 | 92.9 | 91.2 | 91.0 | 93.6 | 92.6 | 92.1 |
| Fitness station for seniors | 90.9 | 89.5 | 90.4 | 87.9 | 90.3 | 88.4 | 89.3 | |
| Senior citizens' corner | 89.9 | 88.0 | 88.3 | 85.5 | 86.2 | 88.0 | 88.0 | 87.2 |
| **Playground** | 90.5 | 79.6 | 89.8 | 92.8 | 91.7 | 93.4 | 93.4 | 90.8 |
| **Parks & Greenery** | 90.4 | 89.8 | 91.2 | 92.1 | 92.3 | 94.3 | 92.2 | 92.0 |
| **Transportation Facilities** | 84.1 | 86.3 | 91.1 | 93.4 | 93.1 | 94.4 | 93.7 | 91.9 |
| **Sports Facilities** | 78.3 | 81.1 | 87.7 | 90.0 | 87.9 | 91.4 | 89.2 | 87.8 |
| **Recreational & Leisure Facilities** | 83.7 | 84.5 | 87.3 | 90.6 | 90.2 | 91.8 | 89.0 | 89.0 |
| **Precinct Facilities** | 91.3 | 87.6 | 86.8 | 89.2 | 89.2 | 92.4 | 91.0 | 89.6 |
| **Community Facilities** | 86.9 | 89.1 | 90.8 | 91.3 | 90.3 | 91.9 | 90.3 | 90.5 |
| **Education Facilities** | 93.8 | 90.8 | 96.8 | 97.3 | 95.0 | 98.3 | 97.4 | 96.1 |
| **Health/Medical Facilities** | 87.9 | 91.8 | 94.5 | 93.8 | 93.6 | 95.5 | 94.4 | 93.6 |
| **Financial Facilities** | 79.0 | 81.3 | 86.9 | 87.9 | 85.3 | 89.7 | 88.8 | 86.6 |
| **Postal Facilities** | 85.6 | 87.5 | 91.6 | 93.1 | 88.7 | 92.3 | 90.5 | 90.7 |
| **Overall Satisfaction** | 91.3 | 91.2 | 94.0 | 94.6 | 95.0 | 96.3 | 96.0 | 94.5 |

** Including non-family based households and siblings/other family members living together*

## 5.2 Usage of Estate Facilities

The usage levels for various estate facilities were determined by asking households how often they or their family members used each estate facility. The full list of estate facilities covered is shown in Table 5.4.

### *Commercial facilities important and remained the most used*

In general, commercial facilities were highly utilised, with at least nine in ten households reporting the use of such facilities (Table 5.4). Supermarkets were found to be more popular compared with wet/dry markets (79.4% compared with 61.0%). This was likely due to the convenience and variety offered by supermarkets. In terms of dining options, hawker centres and eating houses/coffee shops enjoyed similar levels of patronage. This suggests that these affordable dining venues remained essential to many households. In contrast, foodcourts and other F&B outlets recorded lower patronage levels. This could be attributed to various factors such as higher pricing or the range of offerings that may not align as closely with household preferences.

### *Precinct and community facilities well utilised*

Among the precinct facilities, covered linkways (73.9%) was the most frequently used facility, followed by drop-off porches and fitness stations/jogging tracks, with 41.9% and 26.7% of households using them at least once a week respectively.

For community facilities, neighbourhood parks/common greens (22.6%) had the highest usage levels. In contrast, usage levels for roof/sky gardens (5.6%) and community gardens (3.8%) were lower, likely because these facilities tended to be of a smaller size with potentially fewer amenities compared with neighbourhood parks/common greens.

Table 5.4
Frequency of Usage of Estate Facilities

| Types of Estate Facilities | Frequency of Usage (%) | | | Total | |
|---|---|---|---|---|---|
| | At Least Once a Week* | Less Than Once a Week** | Never Use | % | N*** |
| **Commercial Facilities** | | | | | |
| Supermarket | 79.4 | 19.9 | 0.7 | 100.0 | 1,099,742 |
| Wet/Dry market | 61.0 | 30.4 | 8.6 | 100.0 | 1,099,742 |
| HDB shop/Neighbourhood centre | 51.6 | 42.5 | 6.0 | 100.0 | 1,099,742 |
| Shopping centre/mall | 47.5 | 49.3 | 3.2 | 100.0 | 1,099,742 |
| Eating house/Coffee shop | 62.1 | 33.9 | 4.0 | 100.0 | 1,099,742 |
| Hawker centre | 58.5 | 35.7 | 5.8 | 100.0 | 992,425 |
| Foodcourt | 37.9 | 53.4 | 8.6 | 100.0 | 1,099,421 |
| Other F&B outlet *(e.g., fast food, café, restaurant)* | 26.4 | 65.4 | 8.1 | 100.0 | 1,099,742 |
| **Precinct Facilities** | | | | | |
| Covered linkway | 73.9 | 20.6 | 5.5 | 100.0 | 1,055,202 |
| Drop-off porch | 41.9 | 45.3 | 12.8 | 100.0 | 1,039,002 |
| Void deck | 17.5 | 31.9 | 50.6 | 100.0 | 1,099,742 |
| Community living room | 7.0 | 24.4 | 68.5 | 100.0 | 885,708 |
| Shelter | 10.9 | 35.7 | 53.3 | 100.0 | 780,966 |
| Precinct pavilion | 10.7 | 33.6 | 55.7 | 100.0 | 925,074 |
| Trellis | 5.9 | 27.4 | 66.7 | 100.0 | 676,750 |
| Fitness station/Jogging track | 26.7 | 35.1 | 38.2 | 100.0 | 1,079,107 |
| Playground | 12.7 | 20.9 | 66.4 | 100.0 | 1,099,742 |
| Hard/Multi-purpose court | 5.1 | 21.2 | 73.8 | 100.0 | 1,018,942 |
| **Community Facilities** | | | | | |
| Neighbourhood park/Common green | 22.6 | 46.0 | 31.4 | 100.0 | 1,020,617 |
| Regional/Town park | 10.6 | 53.8 | 35.7 | 100.0 | 988,920 |
| Roof/Sky garden | 5.6 | 23.2 | 71.2 | 100.0 | 559,365 |
| Community garden | 3.8 | 16.5 | 79.7 | 100.0 | 741,311 |
| Regional/Community library | 6.5 | 45.7 | 47.8 | 100.0 | 1,099,742 |
| Community club | 6.1 | 52.5 | 41.4 | 100.0 | 1,099,742 |

* *Usage of "Daily" and "At least once a week" has been grouped together as one category*
** *Usage of "At least once a month" and "Occasionally" has been grouped together as one category*
*** *Excluding non-response cases*

*Note:*
*a) Figures may not add up to 100.0% due to rounding*
*b) Analysis was based on responses of households who were provided with the facility and were aware of the presence of such a facility in their estate/neighbourhood or town*

### *Usage higher for most facilities among households in bigger flat types*

Generally, commercial facilities were well-used by households across all flat types except for certain facilities among those living in smaller flat types (Table 5.5). A higher proportion of households living in 3-room or smaller flat types had lower usage for other F&B outlets, shopping centres/malls and supermarkets.

Among the precinct facilities, covered linkways continued to be the most frequently used by households across all flat types, followed by drop-off porches and fitness stations/jogging tracks. A higher proportion of households residing in smaller flat types had higher usage of void decks and community living rooms. It was also observed that households residing in bigger flat types tended to use the drop-off porches more frequently. This was congruent with higher rate of car ownership in households that resided in bigger flat types (refer to Chapter 3, Section 3.3, Table 3.16 for more details). Usage of playgrounds and hard/multi-purpose courts were also higher among those residing in bigger flat types.

For community facilities, neighbourhood parks/common greens were the most well-used, with higher usage observed among households living in 1- and 2-room flats, as well as those in 4-room and bigger flats. The findings also showed that households of 4-room and bigger flat types had higher usage rates of regional/town parks, regional/community libraries and community clubs, with usage levels of at least once a week.

Table 5.5
Usage of Estate Facilities At Least Once a Week by Types of Estate Facilities and Flat Type

| Types of Estate Facilities | Households who Used Facilities At Least Once a Week* (%) | | | | | |
|---|---|---|---|---|---|---|
| | Rental | 1- & 2-Room | 3-Room | 4-Room | 5-Room & Bigger | All |
| **Commercial Facilities** | | | | | | |
| Supermarket | 70.6 | 74.7 | 74.4 | 81.0 | 83.1 | 79.4 |
| Wet/Dry market | 54.5 | 48.8 | 66.8 | 59.8 | 61.1 | 61.0 |
| HDB shop/Neighbourhood centre | 55.6 | 45.2 | 52.1 | 49.8 | 53.8 | 51.6 |
| Shopping centre/mall | 27.2 | 32.4 | 43.3 | 50.1 | 52.8 | 47.5 |
| Eating house/Coffee shop | 57.6 | 61.7 | 64.3 | 61.5 | 62.0 | 62.1 |
| Hawker centre | 61.7 | 53.8 | 65.8 | 55.3 | 57.0 | 58.5 |
| Foodcourt | 28.0 | 35.9 | 34.0 | 37.9 | 43.0 | 37.9 |
| Other F&B outlet *(e.g., fast food, café, restaurant)* | 14.9 | 18.3 | 18.6 | 30.1 | 30.5 | 26.4 |
| **Precinct Facilities** | | | | | | |
| Covered linkway | 71.7 | 70.9 | 77.6 | 71.9 | 74.8 | 73.9 |
| Drop-off porch | 28.0 | 30.6 | 35.2 | 43.8 | 48.5 | 41.9 |
| Void deck | 23.5 | 23.7 | 17.0 | 17.0 | 16.6 | 17.5 |
| Community living room | 11.3 | 9.2 | 6.3 | 6.9 | 6.6 | 7.0 |
| Shelter | 8.6 | 9.3 | 10.5 | 11.8 | 10.7 | 10.9 |
| Precinct pavilion | 9.9 | 10.7 | 10.1 | 11.0 | 10.8 | 10.7 |
| Trellis | 3.9 | 6.7 | 5.5 | 5.4 | 7.3 | 5.9 |
| Fitness station/Jogging track | 17.9 | 23.6 | 21.2 | 26.5 | 33.2 | 26.7 |
| Playground | 8.7 | 6.1 | 9.2 | 14.1 | 14.9 | 12.7 |
| Hard/Multi-purpose court | 4.1 | 2.7 | 3.0 | 5.4 | 6.7 | 5.1 |
| **Community Facilities** | | | | | | |
| Neighbourhood park/Common green | 13.0 | 23.3 | 18.4 | 24.2 | 25.2 | 22.6 |
| Regional/Town park | 6.3 | 7.0 | 8.2 | 11.4 | 12.4 | 10.6 |
| Roof/Sky garden | 2.3 | 5.9 | 5.0 | 5.5 | 6.7 | 5.6 |
| Community garden | 2.2 | 6.6 | 3.1 | 3.8 | 4.3 | 3.8 |
| Regional/Community library | 4.8 | 3.1 | 4.9 | 6.9 | 7.9 | 6.5 |
| Community club | 5.1 | 4.3 | 5.5 | 6.1 | 7.0 | 6.1 |

** Usage of "Daily" and "At least once a week" has been grouped together as one category*

### *Usage levels of estate facilities differed across household life cycle stages*

Families at various life cycle stages have differing needs, which can be seen from their usage levels of various estate facilities provided in the living environment (Table 5.6).

Commercial facilities were found to be well-utilised by households across all different life cycle stages. Wet/Dry markets were most frequented by families with married children (69.9%) and young senior/senior couples living alone (69.3%). Conversely, these markets were least frequented by families without children (35.2%), reflecting different lifestyle preferences and shopping habits. The findings also showed that a lower proportion of young senior/senior couples living alone and non-family based households patronised shopping centres/malls and other F&B outlets due to differing preferences.

Precinct facilities had different usage levels across households at various stages of the household life cycle. Covered linkways were the most frequently used precinct facilities among all households, regardless of their life cycle stage. Families with young children tended to use drop-off porches and playgrounds more frequently, while families with married children were more likely to use community living rooms, shelters and fitness stations/jogging tracks.

Community facilities play a vital role in fostering social interactions and providing recreational opportunities for households. The frequency of usage can vary significantly depending on the household life cycle stage, such as families with young children or families without children. The various types of community facilities were more frequently used by families with young children than those without children, with community clubs being the exception.

Table 5.6
Usage of Estate Facilities At Least Once a Week by Types of Estate Facilities and Household Life Cycle Stage

| Types of Estate Facilities | Households who Used Facilities At Least Once a Week** (%) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Family without Children | Family with Young Children | Family with Teenaged Children | Family with Unmarried Grown-up Children | Family with Married Children | Young Senior/Senior Couple Living Alone | Others*** | All |
| **Commercial Facilities** | | | | | | | | |
| Supermarket | 79.6 | 82.3 | 85.3 | 80.8 | 80.2 | 80.0 | 71.0 | 79.4 |
| Wet/Dry market | 35.2 | 51.2 | 60.0 | 66.4 | 69.9 | 69.3 | 54.7 | 61.0 |
| HDB shop/Neighbourhood centre | 47.1 | 52.8 | 53.2 | 50.6 | 55.4 | 53.6 | 48.7 | 51.6 |
| Shopping centre/mall | 58.8 | 60.4 | 56.7 | 46.2 | 46.8 | 39.6 | 38.6 | 47.5 |
| Eating house/Coffee shop | 64.3 | 63.4 | 62.5 | 62.0 | 62.2 | 63.9 | 58.9 | 62.1 |
| Hawker centre | 53.4 | 52.2 | 52.2 | 62.1 | 56.9 | 61.9 | 60.5 | 58.5 |
| Foodcourt | 36.2 | 43.0 | 43.0 | 38.2 | 37.2 | 37.2 | 32.5 | 37.9 |
| Other F&B outlet *(e.g., fast food, café, restaurant)* | 37.5 | 43.8 | 38.5 | 23.1 | 30.5 | 14.1 | 15.8 | 26.4 |
| **Precinct Facilities** | | | | | | | | |
| Covered linkway | 70.2 | 70.4 | 72.9 | 75.4 | 72.9 | 76.8 | 75.0 | 73.9 |
| Drop-off porch | 47.5 | 60.8 | 43.5 | 40.7 | 44.3 | 38.3 | 29.4 | 41.9 |
| Void deck | 10.2 | 20.2 | 12.2 | 17.6 | 18.7 | 21.6 | 16.7 | 17.5 |
| Community living room | -* | 6.1 | 4.5 | 6.2 | 10.9 | 8.9 | 7.8 | 7.0 |
| Shelter | 6.7 | 10.9 | 9.3 | 12.0 | 14.4 | 12.3 | 8.6 | 10.9 |
| Precinct pavilion | 7.4 | 14.0 | 8.6 | 9.0 | 12.5 | 14.5 | 9.2 | 10.7 |

* *Values with high coefficient of variation (CV) were dropped*
** *Usage of “Daily” and “At least once a week” has been grouped together as one category*
*** *Including non-family based households and siblings/other family members living together*

Table 5.6
Usage of Estate Facilities At Least Once a Week by Types of Estate Facilities and Household Life Cycle Stage *(cont'd)*

| Types of Estate Facilities | Households who Used Facilities At Least Once a Week** (%) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Family without Children | Family with Young Children | Family with Teenaged Children | Family with Unmarried Grown-up Children | Family with Married Children | Young Senior/Senior Couple Living Alone | Others*** | All |
| Trellis | -* | 5.7 | 5.5 | 6.0 | 8.9 | 7.6 | 4.4 | 5.9 |
| Fitness station/Jogging track | 22.1 | 25.6 | 28.2 | 28.0 | 29.8 | 27.1 | 23.4 | 26.7 |
| Playground | -* | 42.9 | 13.4 | 5.7 | 20.2 | 8.0 | 4.3 | 12.7 |
| Hard/Multi-purpose court | 3.3 | 9.0 | 8.2 | 3.8 | 6.8 | 3.6 | 3.2 | 5.1 |
| **Community Facilities** | | | | | | | | |
| Neighbourhood park/Common green | 19.2 | 26.7 | 22.7 | 23.7 | 19.5 | 23.3 | 20.7 | 22.6 |
| Regional/Town park | 9.5 | 11.6 | 10.4 | 10.9 | 9.8 | 11.0 | 9.8 | 10.6 |
| Roof/Sky garden | 3.5 | 9.2 | 4.5 | 4.7 | 7.3 | 5.8 | 3.5 | 5.6 |
| Community garden | 0.5 | 3.4 | 4.0 | 4.1 | 5.2 | 4.8 | 3.1 | 3.8 |
| Regional/Community library | -* | 14.1 | 11.7 | 4.1 | 7.1 | 4.4 | 4.6 | 6.5 |
| Community club | 6.0 | 8.8 | 5.0 | 5.3 | 7.1 | 5.1 | 6.0 | 6.1 |

* *Values with high coefficient of variation (CV) were dropped*
** *Usage of "Daily" and "At least once a week" has been grouped together as one category*
*** *Including non-family based households and siblings/other family members living together*

*Usage levels influenced by changing lifestyle of households*

In general, usage levels for commercial facilities were comparable with 2018 (Table 5.7). The usage levels for other F&B outlets, eating houses/coffee shops and hawker centres had increased compared with 2018. Correspondingly, usage of supermarkets and wet/dry markets registered a slight decline. This trend suggested a shift in household preferences towards dining out rather than cooking at home.

Compared with 2018, the usage of precinct facilities has generally declined, except for drop-off porches, precinct pavilions and fitness stations/jogging tracks. The decline in usage of covered linkways might be attributed to the widespread adoption of work-from-home arrangements, with residents leaving their homes less frequently. Likewise, void decks and shelters also registered a decline in usage, which might be due to the limited activities available in these spaces. Younger households tend to prefer spending their time at shopping centres, while older households are more inclined towards eating houses and coffee shops. This is consistent with the more popular venues for household activities, which include shopping centres/complexes, supermarkets, and eating houses or coffee shops (refer to Section 5.4, Table 5.11 for more details).

For community facilities, usage of neighbourhood parks/common greens, regional/town parks, and roof/sky gardens had increased compared with 2018. This trend may reflect a greater focus on local outdoor activities and an awareness of the mental health benefits offered by green spaces. Conversely, usage of community gardens, regional/community libraries and community clubs had decreased, suggesting that recreational preferences and social habits might be shifting towards other forms of engagement.

Table 5.7
Usage of Estate Facilities At Least Once a Week by Types of Estate Facilities and Year

| Types of Estate Facilities | Households who Used Facilities At Least Once a Week* (%) | | |
|---|---|---|---|
| | **2013** | **2018** | **2023/24** |
| **Commercial Facilities** | | | |
| Supermarket | 80.0 | 81.4 | 79.4 |
| Wet/Dry market | 72.0 | 63.9 | 61.0 |
| HDB shop/Neighbourhood centre | 63.5 | 50.7 | 51.6 |
| Shopping centre/mall | N.A. | N.A. | 47.5 |
| Eating house/Coffee shop | 61.6 | 59.9 | 62.1 |
| Hawker centre | 64.4 | 56.5 | 58.5 |
| Foodcourt | 45.3 | 38.1 | 37.9 |
| Other F&B outlet *(e.g., fast food, café, restaurant)* | N.A. | 23.1 | 26.4 |
| **Precinct Facilities** | | | |
| Covered linkway | 82.3 | 84.2 | 73.9 |
| Drop-off porch | 36.2 | 30.3 | 41.9 |
| Void deck/Community living room** | 25.6 | 27.7 | 18.5 |
| *Void deck* | N.A. | N.A. | 17.5 |
| *Community living room* | N.A. | N.A. | 7.0 |
| Shelter | 16.4 | 22.1 | 10.9 |
| Precinct pavilion | 16.6 | 7.9 | 10.7 |
| Trellis | 13.6 | 7.0 | 5.9 |
| Fitness station/Jogging track | 27.4 | 25.5 | 26.7 |
| Playground | 16.5 | 15.2 | 12.7 |
| Hard/Multi-purpose court | 4.7 | 6.5 | 5.1 |
| **Community Facilities** | | | |
| Neighbourhood park/Common green | 19.8 | 17.8 | 22.6 |
| Regional/Town park | 16.9 | 10.2 | 10.6 |
| Roof/Sky garden | 8.4 | 3.4 | 5.6 |
| Community garden | N.A. | 6.3 | 3.8 |
| Regional/Community library | 15.4 | 11.1 | 6.5 |
| Community club | 9.0 | 7.7 | 6.1 |

** Usage of "Daily" and "At least once a week" has been grouped together as one category*
*** Void deck and community living room were analysed as a single variable in SHS 2013 and 2018*
.

## 5.3 Online Purchase

Households were also asked about their online shopping patterns for physical products and how it had impacted their patronage of HDB shops[13].

### *Online purchases on the rise*

A significantly higher proportion of households made online purchases through websites or mobile applications (58.2%) compared with 2018 (Table 5.8).

Table 5.8
Proportion of HDB Households Who Made Online Purchases through Websites or Mobile Applications over Past Twelve Months by Year

| Whether made Online Purchase | | Proportion who Made Online Purchase (%) | |
|---|---|---|---|
| | | **2018** | **2023/24** |
| **Yes** | | 38.1 | 58.2 |
| **No** | | 61.9 | 41.8 |
| **Total** | **%** | 100.0 | 100.0 |
| | **N** | 1,013,542 | 1,099,742 |

### *Younger households and those living in bigger flat types more likely to make online purchases*

Households who shopped online tended to be younger (aged below 55 years) or lived in 4-room and bigger flat types. (Table 5.9).

[13] Residents were asked to indicate which physical goods they had purchased online through websites or mobile applications during the past 12 months.

Table 5.9
HDB Households Who Made Online Purchases through Websites or Mobile Applications by Attributes

| Attributes | | Whether Made Online Purchase | | Total | |
|---|---|---|---|---|---|
| | | Yes | No | % | N* |
| **Flat Type** | Rental | 30.8 | 69.2 | 100.0 | 54,168 |
| | 1- & 2-Room | 37.1 | 62.9 | 100.0 | 44,693 |
| | 3-Room | 46.2 | 53.8 | 100.0 | 243,054 |
| | 4-Room | 63.1 | 36.9 | 100.0 | 441,425 |
| | 5-Room & Bigger | 68.2 | 31.8 | 100.0 | 316,402 |
| **Age Group (Years)** | Below 35 | 93.4 | 6.6 | 100.0 | 57,604 |
| | 35 – 44 | 93.1 | 6.9 | 100.0 | 179,382 |
| | 45 – 54 | 82.6 | 17.4 | 100.0 | 243,296 |
| | 55 – 64 | 51.3 | 48.7 | 100.0 | 278,585 |
| | 65 & Above | 22.0 | 78.0 | 100.0 | 340,875 |
| **Household Life Cycle Stage** | Family without Children | 91.9 | 8.1 | 100.0 | 60,663 |
| | Family with Young Children | 91.1 | 8.9 | 100.0 | 130,732 |
| | Family with Teenaged Children | 80.1 | 19.9 | 100.0 | 110,110 |
| | Family with Unmarried Grown-Up Children | 52.5 | 47.5 | 100.0 | 314,602 |
| | Family with Married Children | 60.2 | 39.8 | 100.0 | 134,743 |
| | Young Senior/Senior Couple Living Alone | 27.7 | 72.3 | 100.0 | 137,353 |
| | Others** | 42.5 | 57.5 | 100.0 | 203,137 |

* *Excluding non-response cases*
** *Including non-family based households and siblings/other family members living together*

Overall, the proportion of households that shopped online had increased compared with 2018 for all types of physical goods (Table 5.10). General household goods (38.8%) and clothing/footwear (35.7%) were the most common products bought online. Of those who bought these goods online, about half reported that they had shopped less at HDB shops. These findings showed that certain retail trades could be affected by the increasing trend towards e-commerce, especially for retailers with no e-commerce presence. The 2022 Heartland Shop study[14] indicated that e-commerce had little impact on non-replicable online service sectors such as hair salons, medical/dental clinics, enrichment schools, and gyms. These service trades continued to be resilient with healthy occupancy.

[14] Housing & Development Board and Enterprise Singapore. 2024. "Reinvigorating Heartland HDB Shops." Retrieved July 23, 2025. (https://www.hdb.gov.sg/-/media/Heartland-Shops-Study-Report.pdf).

Table 5.10
Types of Products Bought Online and Whether Patronised HDB Shops Less Often due to Online Shopping

| Types of Purchases | 2018 | | | | 2023/24 | | | |
|---|---|---|---|---|---|---|---|---|
| | Households who Shopped Online (%) | Whether Patronise HDB Shops Less Often Due to Online Shopping (%) | | | Households who Shopped Online (%) | Whether Patronise HDB Shops Less Often Due to Online Shopping (%) | | |
| | | Yes | No | Never Made Purchases from HDB Shops | | Yes | No | Never Made Purchases from HDB Shops |
| **General Household Goods** | 12.5 | 6.1 | 5.7 | 0.7 | 38.8 | 17.9 | 19.0 | 1.8 |
| **Clothing/Footwear** | 24.2 | 10.9 | 10.4 | 2.9 | 35.7 | 17.2 | 11.3 | 7.3 |
| **Groceries/Market Produce** | 10.8 | 4.9 | 5.3 | 0.6 | 27.7 | 11.4 | 15.3 | 1.0 |
| **Cosmetics/Toiletries** | 11.7 | 5.7 | 5.1 | 0.9 | 26.3 | 12.5 | 10.9 | 2.9 |
| **Household Appliances/Furniture** | 12.0 | 5.3 | 5.3 | 1.4 | 25.2 | 11.8 | 9.0 | 4.4 |
| **Cooked Food** | 10.7 | 4.6 | 5.8 | 0.3 | 21.9 | 9.0 | 12.3 | 0.6 |
| **Mobile Phone/Computer & Electronic Products** | 13.2 | 5.7 | 5.7 | 1.8 | 19.1 | 9.1 | 5.4 | 4.6 |
| **Books & Stationery/CDs & DVD/Toys** | 9.4 | 3.8 | 4.2 | 1.4 | 14.4 | 6.9 | 4.9 | 2.6 |
| **Sports Equipment/Sports Wear** | 8.9 | 3.9 | 3.7 | 1.3 | 13.6 | 6.1 | 4.2 | 3.3 |
| **Specialised Goods** *(e.g., jewellery, watch, luggage)* | 4.4 | 1.7 | 1.9 | 0.8 | 5.6 | 2.3 | 1.8 | 1.4 |

*Note: Figures may not add up due to rounding*

## 5.4 Places in Estate where Residents Usually Spent Their Time

Identifying common gathering places where residents spend time provides information about where interactions in the community are likely to occur. This information supports HDB in planning and designing the renewal and provision of estate facilities in HDB towns.

### *A higher proportion of residents spent time at commercial facilities*

There has been an increase in residents hanging out at commercial facilities (from 68.4% in 2018 to 84.0% in 2023/24), while the usage of other facilities had decreased compared with 2018 (Table 5.11). Shopping centres/complexes (26.0%) remained the top facility where residents spent their time. Places like supermarkets (17.5%), eating houses/coffee shops (15.4%) and HDB shopping complexes/malls (10.5%) also emerged as popular locations for residents to hang out.

Table 5.11
Places where Residents Usually Spend Their Time at in Estate by Year

| Facilities | | 2013 | 2018 | 2023/24 |
|---|---|---|---|---|
| **Commercial Facilities** | | **68.5** | **68.4** | **84.0** |
| Shopping centre/complex | | 34.0 | 36.1 | 26.0 |
| Supermarket | | 6.4 | 6.1 | 17.5 |
| Eating house/Coffee shop | | 10.5 | 9.4 | 15.4 |
| HDB shopping complexes/malls | | 4.1 | 2.9 | 10.5 |
| Hawker centre | | 4.4 | 5.3 | 8.4 |
| Market/Stall | | 5.5 | 5.5 | 6.2 |
| Others *(e.g., pet shop, fast food, café)* | | 3.5 | 3.0 | -* |
| **Recreational/Leisure Facilities** | | **16.1** | **16.5** | **10.0** |
| Park/Garden | | 8.8 | 8.9 | 6.9 |
| Playground | | 3.3 | 3.3 | 2.1 |
| Library | | 1.9 | 1.6 | 1.0 |
| Others *(e.g., SAFRA club house, civil service club)* | | 2.1 | 2.7 | N.A. |
| **Precinct Facilities** | | **5.8** | **5.9** | **3.2** |
| Void deck/Community living room/Residents' corner | | 4.4 | 4.3 | 3.2 |
| Others *(e.g., shelter)* | | 1.4 | 1.6 | N.A. |
| **Sports Facilities** | | **4.1** | **3.7** | **1.2** |
| Fitness corner/station | | 1.6 | 1.3 | 1.1 |
| Others *(e.g., gym)* | | 2.5 | 2.4 | -* |
| **Community Facilities** | | **3.8** | **4.4** | **1.2** |
| Religious institution | | 1.6 | 1.2 | 0.1 |
| Others *(e.g., Community centre/Active Aging Centre)* | | 2.2 | 3.2 | 1.1 |
| **Others *(e.g., family/relative's/sibling's home)*** | | **1.7** | **1.1** | **0.3** |
| **Total** | **%** | 100.0 | 100.0 | 100.0 |
| | **N**** | 846,712 | 886,455 | 1,089,372 |

**  Values with high coefficient of variation (CV) were dropped*
*** Excluding non-response cases*

*Note: Figures may not add up to 100.0% due to rounding*

## 5.5 Summary of Findings

HDB towns are planned holistically, with careful integration of housing, transportation, amenities, green spaces and employment opportunities to create a self-contained community. This comprehensive approach may explain why the overall satisfaction with estate facilities has remained above 90% since 2003.

Commercial facilities, which cater to the essential needs of households, saw significantly higher usage levels compared with precinct and community facilities. Supermarkets were the most frequently used among commercial facilities, while covered linkways were the most frequently used among precinct facilities. Neighbourhood parks/Common greens were the most utilised community facilities.

Residents spent most of their time at shopping centres/malls, supermarkets and eating houses/coffee shops within the town/estate. Shopping centres/complexes, which served as venues for dining and general shopping, remained the top facility where residents spent their time. Both eating houses/coffee shops and HDB shopping complexes/malls also saw an increase in popularity.

The trend of online shopping has increased, with higher prevalence among younger households or those living in 4-room or bigger flats. About six in ten households made online purchases for physical goods in the past 12 months, with general household goods being the most common purchase. Overall, about half of those who made online purchases shopped less at HDB shops. These findings show that retailers with no e-commerce presence may be the most affected.

# 6

# Residential Mobility and Housing Aspirations

*Chapter 6*

# Residential Mobility and Housing Aspirations

As HDB continues to strive towards fulfilling residents' aspirations for homes, it is also essential to keep track of the residential movements and housing aspirations of its residents as their housing needs and preferences may evolve due to changes in their socio-economic profiles, economic conditions, availability of housing supply and housing policies. Specifically, this chapter continues to examine the past residential movement of residents from their first matrimonial home to the current flat. Understanding these movements provides insights into the factors that influence housing decisions and the evolving needs of households over time. It also explores the likely residential movements of residents over the next five years. This includes identifying the types of housing that residents are considering moving to and the reasons behind such decisions.

Residents' housing arrangements may also evolve as they age, and these housing plans will be informed by the housing type that residents are content with and the preferred housing type for old age, which highlight the aspirations of residents for their ideal housing arrangements as they age.

## 6.1 Past Residential Mobility

The residential movement of households is a dynamic process influenced by various factors, including financial considerations, household composition and lifestyle preferences. This section presents the findings on the type of housing that couples lived in as their first matrimonial home, the length of residence in their previous housing unit, and the type of move they made from their previous housing unit to the current one. From the selection of the first matrimonial home to subsequent moves, each decision reflects the evolving needs and aspirations of couples. Understanding these patterns of movement can provide valuable insights into the housing choices and living experiences of married couples.

### *Higher proportion of married couples below 55 years old lived in 4-room or 5-room flats upon marriage*

Out of the 1,099,742 resident households living in HDB flats, 86.4% of the households were headed by residents who were either married or had ever been married[15]. Among them, 16.3% lived in parents'/relatives' place upon marriage (Table 6.1). The common first flat types purchased among the married/ever-married households were 4-room (29.8%) and 3-room flats (19.2%). By age group, proportionately more seniors aged 65 years and above lived in 3-room (26.2%) or HDB rental (14.3%) flats when they first got married as compared with the overall proportions. This was likely due to the supply of housing types available at the time of their marriage. Among the young seniors aged 55 to 64 years, proportionately more households lived in 4-room flats (33.3%), followed by 3-room (22.9%) and 5-room (15.1%) flats. On the other hand, a higher proportion of younger households below 55 years old lived in 4-room or 5-room flats, partly due to the ample supply of such flat types available in the housing market at the time of their marriage and their housing preferences.

[15] Refers to residents who were previously married, but separated, divorced or widowed at the time of survey.

Table 6.1
First Housing Type Lived in since Marriage among Married/Ever-Married Households by Age

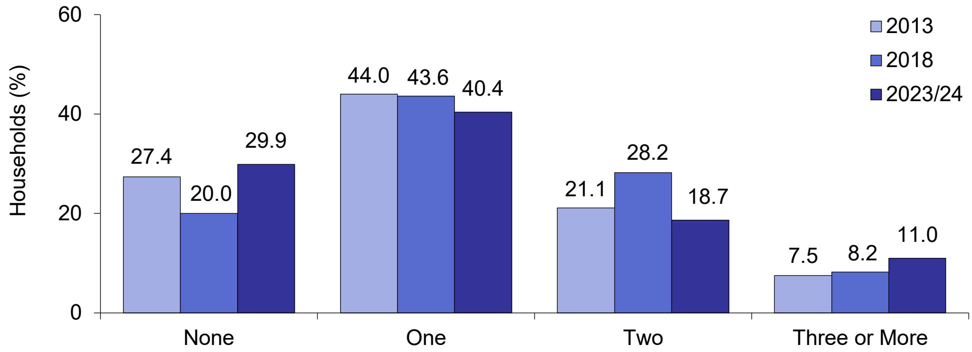
| First Housing Type | | Age Group (Years) | | | | | |
|---|---|---|---|---|---|---|---|
| | | Below 35 | 35 – 44 | 45 – 54 | 55 – 64 | 65 & Above | All |
| **Parents'/Relatives' Place** | | 23.0 | 18.6 | 13.4 | 12.4 | 18.9 | 16.3 |
| **HDB Rental** | | 6.5 | 3.1 | 3.3 | 4.4 | 14.3 | 7.3 |
| **Open Market Rental** | | 6.6 | 13.8 | 11.2 | 4.9 | 5.9 | 8.1 |
| **1- & 2-Room** | | -** | 0.5 | 0.8 | 1.4 | 1.8 | 1.2 |
| **3-Room** | | 5.4 | 8.8 | 16.0 | 22.9 | 26.2 | 19.2 |
| **4-Room** | | 39.6 | 37.6 | 32.5 | 33.3 | 19.7 | 29.8 |
| **5-Room** | | 16.5 | 15.0 | 19.2 | 15.1 | 7.4 | 13.6 |
| **Executive** | | -** | 1.5 | 2.5 | 4.0 | 1.8 | 2.5 |
| **Private Housing*** | | -** | 1.1 | 0.7 | 1.3 | 1.8 | 1.2 |
| **Attap House/Staff Quarter/Shophouse** | | - | - | -** | -** | 2.2 | 0.8 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N*** ** | 53,283 | 149,626 | 197,979 | 229,795 | 298,470 | 929,153 |

* *Refers to private condominiums, apartments, terrace houses, detached houses, etc.*
** *Values with high coefficient of variation (CV) were dropped*
*** *Excluding non-response cases*

## *Residential mobility declined compared with 2018*

Among the married/ever-married households, three in ten (29.9%) indicated that they had lived in their current flat since they got married, while 40.4% had moved once, 18.7% had moved twice, and the remaining 11.0% had moved three or more times (Chart 6.1). The proportion of households who had moved at least once since marriage decreased from 80.0% in 2018 to 70.1% in 2023/24. The decline in residential mobility could be attributed to a decrease in the proportion of households living with parents or relatives, and an increase in the purchase of 4-room and bigger flat types, particularly among the younger households, as a higher proportion of them were able to move into their purchased housing unit upon marriage.

Chart 6.1
Number of Residential Moves since Marriage among Married/Ever-Married Households by Year




## *Families with children tended to make more residential moves than families without children*

The number of residential moves made varied with one's life cycle stage. In general, families without children made fewer residential moves as compared with families with children (Table 6.2). Among families with children, the proportion who had moved at least once since marriage was 54.2% for families with young children. It increased to 63.8% for families with teenaged children, 73.9% for families with unmarried grown-up children, and 83.6% for families with married children.

Table 6.2
Number of Residential Moves since Marriage among Married/Ever-Married Households by Resident Life Cycle Stage

| Resident Life Cycle Stage | Number of Residential Moves since Marriage | | | | Total | |
|---|---|---|---|---|---|---|
| | None | One | Two | Three or More | % | N* |
| **Family without Children** | **53.4** | **33.1** | **7.7** | **5.8** | **100.0** | **97,101** |
| Couple Aged Below 55 Years | 63.1 | 28.5 | 5.8 | 2.6 | 100.0 | 63,534 |
| Couple with At Least One Spouse Aged 55 & Above | 34.9 | 41.7 | 11.4 | 12.0 | 100.0 | 33,567 |
| **Family with Children** | **27.0** | **41.4** | **20.0** | **11.6** | **100.0** | **825,840** |
| Family with Young Children | 45.8 | 37.9 | 11.9 | 4.4 | 100.0 | 151,427 |
| Family with Teenaged Children | 36.2 | 42.4 | 13.6 | 7.8 | 100.0 | 125,915 |
| Family with Unmarried Grown-Up Children | 26.1 | 43.4 | 18.7 | 11.8 | 100.0 | 190,473 |
| Family with Married Children | 16.4 | 41.5 | 26.3 | 15.8 | 100.0 | 358,025 |
| **Non-Family** | **34.1** | **36.9** | **18.4** | **10.6** | **100.0** | **24,597** |
| **All** | 29.9 | 40.4 | 18.7 | 11.0 | 100.0 | 948,126 |

* *Excluding non-response cases*

### *Married couples who started with 4-room or bigger flat made fewer moves*

A higher proportion of households whose first housing unit was a purchased 4-room (49.6%), 5-room and bigger (55.1%) flat had not moved since marriage (Table 6.3). In contrast, the proportion was 29.2% for households who purchased a 3-room and smaller flat. This suggests that the type of housing that couples start with could influence their likelihood to move. Households living in bigger flat types, such as 4-room or 5-room flats, tend to have a lower propensity to move compared with those in smaller flats. This can be attributed to the fact that bigger flats provide sufficient space for families to expand as they progress through various life cycle stages.

Table 6.3
Number of Residential Moves since Marriage among Married/Ever-Married Households by First Housing Type Lived in since Marriage

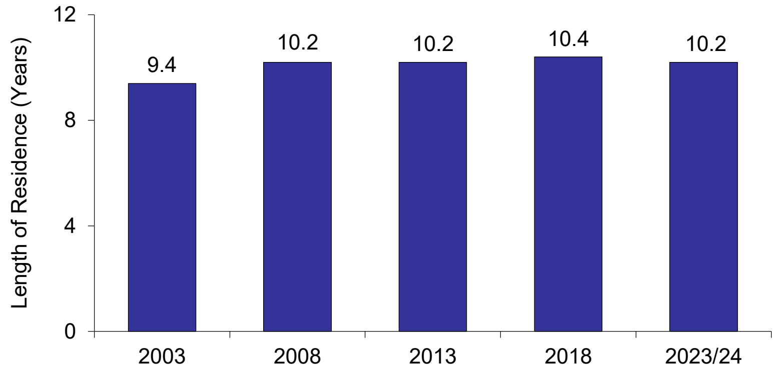
| First Housing Type | Number of Residential Moves since Marriage | | | | Total | |
|---|---|---|---|---|---|---|
| | None | One | Two | Three or More | % | N** |
| **Parents'/Relatives' Place** | N.A. | 61.3 | 25.1 | 13.6 | 100.0 | 151,594 |
| **HDB Rental** | 13.5 | 39.0 | 30.9 | 16.6 | 100.0 | 67,575 |
| **Open Market Rental** | N.A. | 36.4 | 36.0 | 27.6 | 100.0 | 75,213 |
| **3-Room & Smaller** | 29.2 | 45.0 | 17.6 | 8.2 | 100.0 | 189,489 |
| **4-Room** | 49.6 | 34.2 | 10.5 | 5.7 | 100.0 | 276,833 |
| **5-Room & Bigger** | 55.1 | 29.6 | 9.2 | 6.1 | 100.0 | 149,037 |
| **Others*** | N.A. | 42.7 | 33.4 | 23.9 | 100.0 | 19,413 |
| **All** | 29.9 | 40.4 | 18.7 | 11.0 | 100.0 | 948,126 |

* *Including private housing, attap house, staff quarter and shophouse*
** *Excluding non-response cases*

## *Length of residence in previous housing remained largely unchanged over past 15 years*

Among households who had moved at least once since their marriage, the average length of residence in their previous housing unit was 10.2 years. This duration has remained consistent over the past 15 years (Chart 6.2). The sustained duration suggests that public housing policies have been effective in supporting long-term occupation and reflects the satisfaction and contentment of households with their living conditions, contributing to a stable community environment.

Chart 6.2
Average Length of Residence in Previous Housing Unit among Married/Ever-Married Households by Year



### *Fewer households upgraded, while more households downgraded or made lateral moves*

This section looks at the type of moves[16] residents made when they moved from their previous housing unit to their current flat. It compares the previous housing unit, owned or rented, with the current flat. Households who were previously residing in parents'/relatives' place were excluded from the comparison.

Between 2018 and 2023/24, the proportion of households who upgraded had decreased from 62.7% to 56.3% (Chart 6.3). Conversely, the proportions who made lateral moves and those who downgraded increased from 17.0% to 19.9% and 20.3% to 23.8% in 2023/24, respectively. The shifts in the type of moves could be due to several factors. The increased proportion of households who downgraded could be associated with the increased supply of 2-room Flexi flats[17] to support more seniors who wished to right-size and unlock the equity of the previous flat for retirement needs. The rising property prices in recent years could have also moderated the upgrading aspirations of some households and prompted them to stay put. In addition, couples who bought a 4-room or bigger flat type could have less of a need to upgrade. For households who moved laterally to the same flat type, it was mainly for the desire for a better living environment or proximity to family for mutual care and support.

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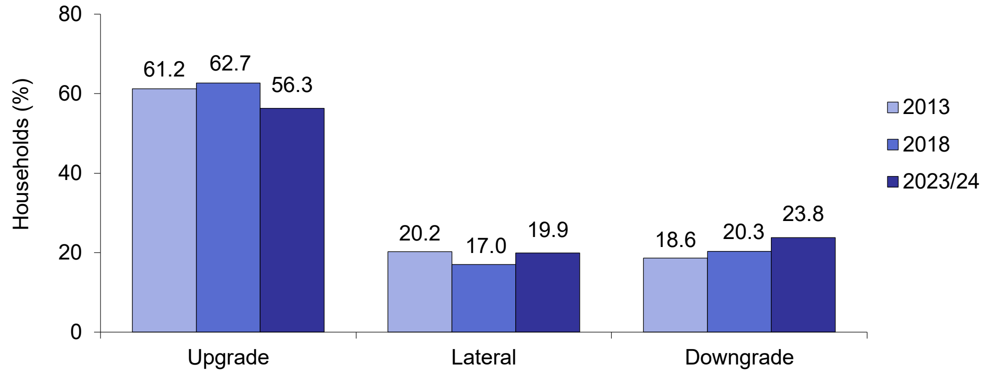
[16] The terms "Upgrade", "Lateral" and "Downgrade" are used to categorise the type of residential movement. Residents are considered to have upgraded when they moved from a smaller to a bigger flat type, or from a rental housing unit to a sold flat. Residents who made lateral moves are those who moved across similar flat types, with tenure remaining the same. Residents are considered to have downgraded when they moved from a bigger to a smaller flat type or from private housing to an HDB flat or from sold housing unit to an HDB rental flat. As residents may move for various reasons, the terms should be regarded as neutral terms and should not be interpreted as positive when residents upgrade and negative when residents downgrade, e.g., a resident could have downgraded due to a decrease in household size instead of financial difficulty. The figures do not include residents who were previously residing in housing unit owned or rented by other people (e.g., parents, relatives, friends).

[17] 2-room Flexi Scheme was introduced in 2015, which merged and replaced the 2-room flat scheme and Studio Apartment (SA) scheme, to better cater to the diverse housing needs of families, singles and seniors. Citizens aged 55 years and above have the flexibility of choosing the length of the lease on their 2-room Flexi flat, based on their age, needs and preferences. They can take up a lease of between 15 and 45 years in five-year increments, as long as it covers them and their spouse up to the age of at least 95 years.

Chart 6.3
Type of Move among Married/Ever-Married Households by Year




Residents tend to upgrade when they are younger and have better financial ability to do so given that they have many more working years ahead. Based on residents' age at the point of a move, about two-thirds (64.8%) of residents below 35 years had upgraded (Table 6.4). This proportion tapered to 48.1%, 30.8% and 22.9% with each increase in age band. The proportion of older residents aged 55 years and above who had downgraded was higher than other age groups, as some of them could have right-sized to a smaller flat type due to a reduction in household size as their children moved out upon marriage. Other residents who had downgraded mainly did so for affordability reasons or because they wanted to move to a flat with better living environment or provision of facilities.

Table 6.4
Type of Move among Married/Ever-Married Households by Age at Point of Move

| Age Group at Point of Move (Years) | Type of Move | | | Total | |
|---|---|---|---|---|---|
| | Upgrade | Lateral | Downgrade | % | N* |
| **Below 35** | 64.8 | 19.7 | 15.5 | 100.0 | 309,138 |
| **35 – 44** | 48.1 | 20.2 | 31.7 | 100.0 | 137,773 |
| **45 – 54** | 30.8 | 20.5 | 48.7 | 100.0 | 42,291 |
| **55 & Above** | 22.9 | 23.4 | 53.7 | 100.0 | 18,405 |
| **All** | 56.3 | 19.9 | 23.8 | 100.0 | 525,018 |

** Excluding non-response cases*

The motivations behind household moves are diverse, ranging from practical considerations such as space and financial capability to personal preferences for living environments and proximity to loved ones. Residents were asked to provide up to three reasons for moving to their present flat. Analysis was done to understand the reasons as to why a household had upgraded, moved laterally or downgraded (Table 6.5).

Among the responses, the main reason given by households who had upgraded was to accommodate an increase in household size or to have a bigger space for family activity (26.9%). Other commonly mentioned reasons included moving to a flat with a better design or flat orientation (11.5%) and relocating to a place with a better living environment (11.1%).

For households who moved laterally, the reasons varied slightly. The main reasons included moving to a more favourable living environment (12.4%) and relocating closer to family members' or friends' place (12.0%), possibly for mutual care and support. Another 11.1% of the reasons cited was to move to a bigger flat because of an increase in household size, and this group of movers could have moved to a same flat type of a bigger size.

Residents who downgraded had several commonly mentioned reasons. These included preference for a smaller flat due to changes in household size (12.4%), housing affordability (12.0%) and provision of facilities (11.4%). There was also a group of households who had downgraded due to financial difficulty (10.8%) or preferred a place that offered a conducive/pleasant living environment (10.5%).

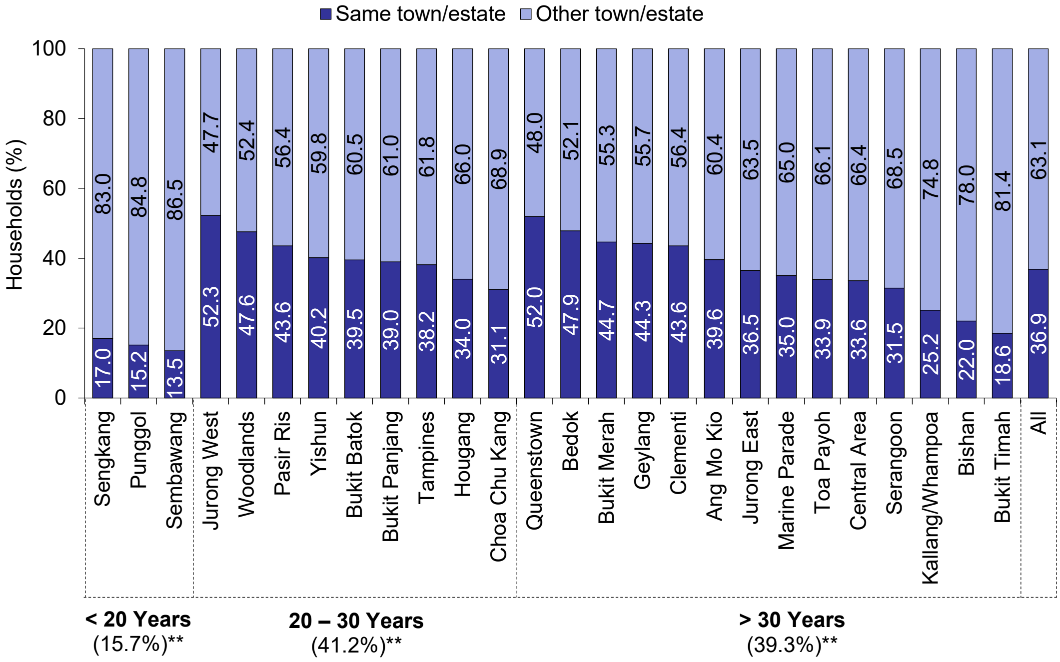
Table 6.5
Reasons for Moving to Present Flat among Married/Ever-Married Households by Type of Move

| Reasons for Moving to Present Flat | | Type of Move | | | All |
|---|---|---|---|---|---|
| | | Upgrade | Lateral | Down-grade | |
| Needed bigger flat as household size increased/more space for family activity | | 26.9 | 11.1 | 2.8 | 18.1 |
| Conducive/pleasant/cleaner/quieter environment | | 11.1 | 12.4 | 10.5 | 11.2 |
| More facilities | | 9.9 | 9.9 | 11.4 | 10.3 |
| More attractive flat design/layout/orientation | | 11.5 | 10.8 | 5.6 | 10.0 |
| Able to afford the current type of housing | | 7.1 | 8.4 | 12.0 | 8.5 |
| To move closer to parents/children/relatives/friends | | 5.9 | 12.0 | 9.4 | 7.9 |
| Accessibility to place of work | | 7.8 | 8.6 | 6.2 | 7.6 |
| Moved out of parents' place/started own family | | 8.5 | 6.4 | 3.9 | 7.0 |
| Settled financial difficulty *(e.g., settling medical bills, debts)* | | 1.0 | 3.8 | 10.8 | 3.8 |
| Preferred smaller flat as household size decreased/preferred smaller flat | | 0.5 | 2.5 | 12.4 | 3.7 |
| Previous flat was affected by redevelopment programmes *(e.g., SERS, resettlement)* | | 3.1 | 3.6 | 1.5 | 2.8 |
| Realised capital gains from sale of previous unit | | 1.3 | 3.1 | 4.8 | 2.5 |
| To move closer to schools | | 1.3 | 1.3 | 1.1 | 1.3 |
| Monetised flat for retirement | | 0.5 | 0.9 | 3.3 | 1.2 |
| Preferred lease length of current flat/previous flat lease was shorter | | 1.4 | 1.3 | 0.5 | 1.2 |
| Divorced | | 0.2 | 1.3 | 2.1 | 0.9 |
| Moved to homeownership flat/previous unit was rented | | 1.6 | N.A. | N.A. | 0.9 |
| Renting temporarily/preferred renting instead of buying | | N.A. | 1.5 | 1.1 | 0.5 |
| Good transportation network/centralised location | | 0.1 | 0.4 | 0.2 | 0.2 |
| Others *(e.g., due to conflict with family/neighbours, moved in to live with parents, more familiar with current neighbourhood)* | | 0.3 | 0.7 | 0.4 | 0.4 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 |
| | **No. of Responses*** | 524,859 | 179,103 | 218,987 | 922,949 |

* *Excluding non-response cases*

Among the households who had moved at least once, 36.9% moved within the same town/estate (Chart 6.4). This proportion was slightly higher than 34.0% in 2018. Households who lived in newer towns (i.e., Sengkang, Punggol and Sembawang) had lower proportions of movements within the same town. Conversely, towns/estates with an average age of blocks of 20 years and above exhibited higher proportions of households moving within the same town/estate.

Chart 6.4
Extent of Geographical Move of Married/Ever-Married Households by Present Town/Estate*



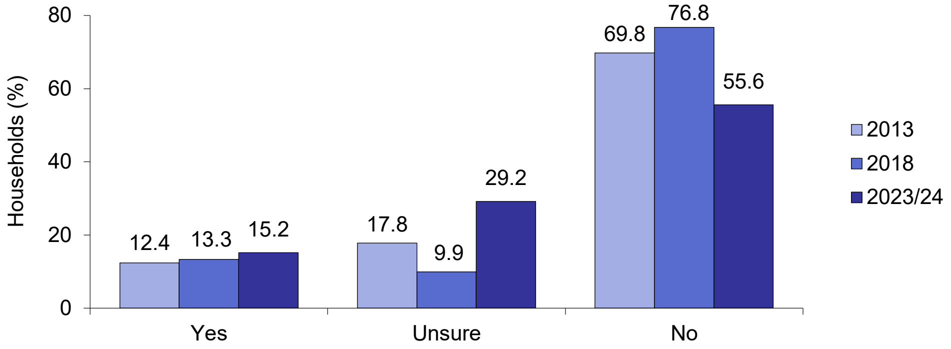

* *Towns/Estates are grouped based on average age of blocks in respective town/estate. The age of block is computed based on number of years from when the block was handed over as at June 2023.*
** *Overall proportion of households who moved within the same town in the respective group of towns/estates*

## 6.2 Intention to Move within Next Five Years

### *About half had no intention to move, slight increase in those intended to move within the next five years*

The proportion of households who intended to move within the next five years increased slightly from 13.3% in 2018 to 15.2% in 2023/24. Conversely, the proportion of households planning to remain in their current flat decreased significantly from 76.8% to 55.6% over the same period. This shift was accompanied by a marked increase in the proportion of households uncertain about their housing arrangements in the next five years, increasing from 9.9% in 2018 to 29.2% in 2023/24 (Chart 6.5).

Chart 6.5
Intention to Move within Next Five Years by Year




Among households who intended to move (15.2%), the commonly mentioned reasons were related to housing needs, whereby 37.6% of these households said that they needed a bigger HDB flat, 24.5% preferred a newer housing unit, and 18.4% planned to right-size to a smaller housing unit.

Among households uncertain about moving (29.2%), about half would base their decision on their financial situation (50.8%). Other commonly mentioned reasons included not having thought about moving (30.9%), family members' decision (28.5%) and the housing market situation (28.5%).

For households not intending to move (55.6%), around half were comfortable with their current flat (50.3%), while 44.4% said that their current flat met their housing needs, and 34.9% cited having lived in the flat for many years or being familiar with the place.

### *Households living in rental flats, younger households or families with young children had higher propensity to move*

Households living in HDB rental flats had a higher propensity to move within the next five years (26.6%) compared with those in other flat types, which ranged between 8.0% and 15.7% (Table 6.6). Majority of these rental tenants intended to buy an HDB flat (71.4%), while others intended to continue renting another HDB rental flat or to move into their parents'/children's/relatives' place. Households living in 1- and 2-room flats had the lowest proportion of households intended to move. About three-quarters (75.1%) of the households living in such flats were aged 55 years and above, with the majority likely intended to age in place in these flats.

Table 6.6
Intention to Move within Next Five Years among HDB Households by Flat Type

| Present Flat Type | Intention to Move within Next Five Years | | | Total | |
|---|---|---|---|---|---|
| | Yes | Unsure | No | % | N |
| **HDB Rental** | 26.6 | 23.2 | 50.2 | 100.0 | 54,168 |
| **1- & 2-Room** | 8.0 | 25.0 | 67.0 | 100.0 | 44,693 |
| **3-Room** | 13.9 | 26.3 | 59.8 | 100.0 | 243,054 |
| **4-Room** | 15.7 | 31.6 | 52.7 | 100.0 | 441,425 |
| **5-Room & Bigger** | 14.8 | 29.6 | 55.6 | 100.0 | 316,402 |
| **All** | **15.2** | **29.2** | **55.6** | **100.0** | **1,099,742** |

Younger residents had a higher propensity to move than older residents, with 34.3% of residents aged below 35 years and 28.3% of residents aged 35 to 44 years intended to move in the next five years (Table 6.7). A higher proportion of younger residents were also unsure of moving. In contrast, the intention to move was lower among seniors aged 65 years and above (74.2%), which could be attributed to their stronger sense of attachment to their current place of residence and a desire to age in place.

Table 6.7
Intention to Move within Next Five Years among HDB Households by Age

| Age Group (Years) | Intention to Move within Next Five Years | | | Total | |
|---|---|---|---|---|---|
| | Yes | Unsure | No | % | N |
| **Below 35** | 34.3 | 45.5 | 20.2 | 100.0 | 57,604 |
| **35 – 44** | 28.3 | 37.2 | 34.5 | 100.0 | 179,382 |
| **45 – 54** | 16.7 | 33.7 | 49.6 | 100.0 | 243,296 |
| **55 – 64** | 11.9 | 29.3 | 58.8 | 100.0 | 278,585 |
| **65 & Above** | 6.9 | 18.9 | 74.2 | 100.0 | 340,875 |
| **All** | **15.2** | **29.2** | **55.6** | **100.0** | **1,099,742** |

Nearly a third (32.6%) of families with young children (eldest child aged 12 years and below) expressed their intention to move within the next five years, compared with only 8.5% of young senior/senior couples living alone (Table 6.8). Further analysis showed that a higher proportion of families with young children intended to move to a bigger flat.

Table 6.8
Intention to Move within Next Five Years among HDB Households by Household Life Cycle Stage

| Household Life Cycle Stage | Intention to Move within Next Five Years | | | Total | |
|---|---|---|---|---|---|
| | Yes | Unsure | No | % | N** |
| **Family without Children** | 23.5 | 43.8 | 32.7 | 100.0 | 60,663 |
| **Family with Young Children** | 32.6 | 34.5 | 32.9 | 100.0 | 130,732 |
| **Family with Teenaged Children** | 21.7 | 30.2 | 48.1 | 100.0 | 110,110 |
| **Family with Unmarried Grown-Up Children** | 11.0 | 29.6 | 59.4 | 100.0 | 314,602 |
| **Family with Married Children** | 16.2 | 29.1 | 54.7 | 100.0 | 134,848 |
| **Young Senior/Senior Couple Living Alone** | 8.5 | 20.3 | 71.2 | 100.0 | 137,248 |
| **Others*** | 8.2 | 25.9 | 65.9 | 100.0 | 203,137 |
| **All** | **15.2** | **29.2** | **55.6** | **100.0** | **1,099,742** |

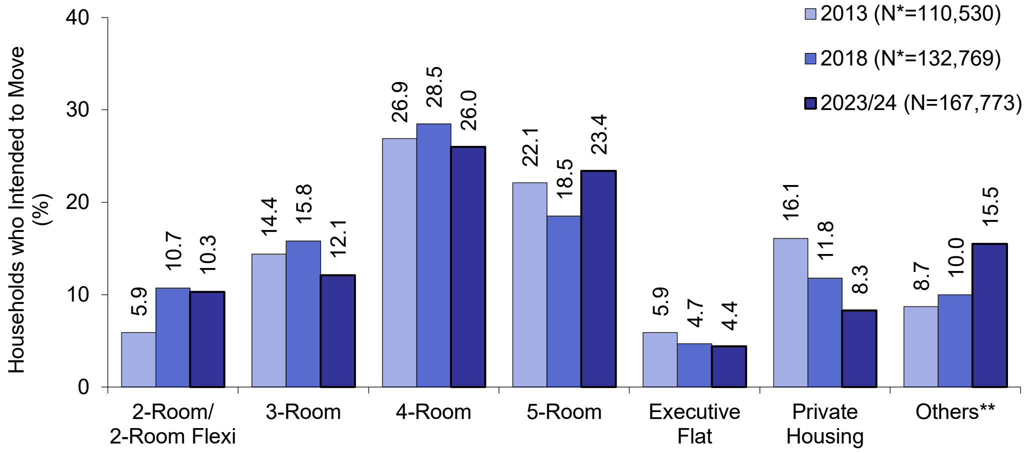
*  *Including non-family based households and siblings/other family members living together*
** *Excluding non-response cases*

### *4-room and 5-room flats remained the popular choice among those intended to move within the next five years*

Overall, 26.0% of households who intended to move preferred to move to 4-room flats (Chart 6.6), followed by 5-room flats (23.4%).  These flat types remained the most popular choices among potential movers.

After rising from 5.9% in 2013 to 10.7% in 2018, the proportion of households who intended to move to 2-room Flexi flats remained stable at 10.3% in 2023/24. Conversely, the proportion choosing 3-room flats decreased from 15.8% in 2018 to 12.1% in 2023/24, while those opting for Executive flats remained unchanged since 2018.  Notably, the preference for private housing continued to decrease.

Chart 6.6
Preferred Housing Type to Move to within Next Five Years by Year




* *Excluding non-response cases*
** *Including households who intended to rent a room/whole housing unit in public/private property market, live in family members'/friends' place or other accommodation, move overseas or had not decided on the next housing type*

Generally, households intended to move to a flat that was one size bigger than their present flat (Table 6.9). Among households living in HDB rental and 1- and 2-room flats, a higher proportion intended to move to a 3-room flat (32.0%), followed by a 4-room flat (20.4%). Another one-fifth intended to move to a 2-room flat (19.8%), while the remaining households (26.3%) chose other housing options such as living with family members/friends or renting a whole unit or room. Among those living in 3-room flats, the predominant choice was a 4-room flat (43.7%). Among households who were currently living in 4-room flats, 38.3% had expressed an intention to move to a 5-room and bigger flat. A higher proportion of households in the bigger flat types also had intention to move to private housing.

Table 6.9
Preferred Housing Type among Households who Intended to Move by Present Flat Type

| Preferred Housing Type to Move to | | Present Flat Type: HDB Rental & 1- & 2-Room | 3-Room | 4-Room | 5-Room & Bigger | All |
|---|---|---|---|---|---|---|
| **HDB** | | | | | | |
| 2-Room/2-Room Flexi | | 19.8 | 11.7 | 9.3 | 7.3 | 10.3 |
| 3-Room | | 32.0 | 9.7 | 9.5 | 10.0 | 12.1 |
| 4-Room | | 20.4 | 43.7 | 21.3 | 22.1 | 26.0 |
| 5-Room & Bigger | | -*** | 19.0 | 38.3 | 28.8 | 27.8 |
| **Private Housing*** | | - | -*** | 9.8 | 13.8 | 8.3 |
| **Others**** | | 26.3 | 14.0 | 11.8 | 18.0 | 15.5 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N** | 17,938 | 33,885 | 69,123 | 46,826 | 167,773 |

* *Including Executive Condominium, private condominium/apartment and landed properties*
** *Including households who intended to rent a room/whole housing unit in public/private property market, live in family members'/friends' place or other accommodation, move overseas or had not decided on the next housing type*
*** *Values with high coefficient of variation (CV) were dropped*

## *Housing choice varied with age*

Residents' housing and flat type preferences differed by age. At least 70% of those aged below 55 years intended to move to 4-room or bigger flats or private properties (Table 6.10), unlike their counterparts aged 55 years and above. Younger residents tended to prefer bigger flat types as they expected their household size to grow and need more space to meet future family needs. Given their longer working years ahead and higher earning potential, they are likely to be able to afford bigger flats. On the contrary, older residents would find smaller flats more suitable in their retirement years. A higher proportion of senior households aged 65 years and above planned to move into a 2-room flat (31.1%) or had other housing arrangements such as living with family members or friends (23.7%). Senior households had a lower preference to move to bigger flat types or private housing.

Table 6.10
Preferred Housing Type among Households who Intended to Move by Age

| Preferred Housing Type to Move to | | Age Group (Years) | | | | | All |
|---|---|---|---|---|---|---|---|
| | | Below 35 | 35 – 44 | 45 – 54 | 55 – 64 | 65 & Above | |
| **HDB** | | | | | | | |
| 2-Room/2-Room Flexi | | -*** | 1.2 | 6.7 | 19.6 | 31.1 | 10.3 |
| 3-Room | | 6.2 | 9.1 | 9.2 | 18.9 | 18.9 | 12.1 |
| 4-Room | | 21.9 | 25.4 | 29.2 | 31.2 | 17.5 | 26.0 |
| 5-Room & Bigger | | 40.9 | 38.5 | 30.6 | 14.6 | 7.8 | 27.8 |
| **Private Housing*** | | 13.9 | 13.2 | 9.2 | -*** | -*** | 8.3 |
| **Others**** | | 16.0 | 12.6 | 15.1 | 14.3 | 23.7 | 15.5 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N** | 19,749 | 50,722 | 40,661 | 33,171 | 23,470 | 167,773 |

* *Including Executive Condominium, private condominium/apartment and landed properties*
** *Including households who intended to rent a room/whole housing unit in public/private property market, live in family members'/friends' place or other accommodation, move overseas or had not decided on the next housing type*
*** *Values with high coefficient of variation (CV) were dropped*

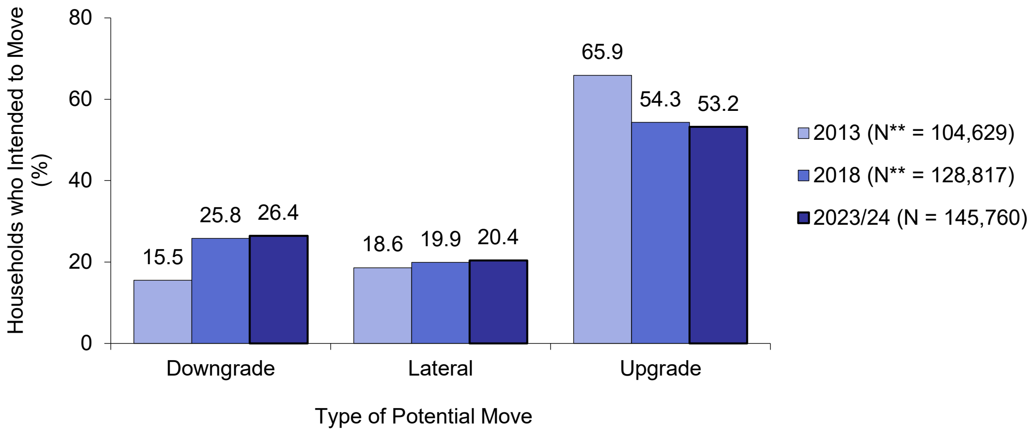
### *About half intended to upgrade within the next five years, similar trend compared with 2018*

Among households who planned to move within the next five years, potential moves were classified into three broad categories[18]: downgrade, lateral and upgrade. The categorisation provides a perspective on the type of potential moves by comparing the present flat type households were residing in with their desired housing type to move to in the next five years. Households who intended to move to live in family members' or friends' place, move overseas, or undecided on the housing type were excluded from the comparison.

Compared with 2018, the proportions of households who intended to downgrade, move laterally and upgrade remained similar (Chart 6.7). Among those planning to move in the next five years, 53.2% intended to upgrade, 26.4% intended to downgrade, and 20.4% intended to move laterally.

[18] Potential moves are classified as "downgrade" if households intend to move from a bigger to a smaller flat type or from sold flat to a rental housing. Potential moves made by households who intend to move across similar flat types, with tenure remaining the same, are classified as "lateral". Potential moves from a smaller to bigger HDB flat, from a rental housing to a sold HDB flat or from current HDB flat to a private housing are classified as "upgrade".

Chart 6.7
Type of Potential Move* by Year




* *Excluding households who intended to live in family members'/friends' place or other accommodation, move overseas or had not decided on the next housing type*
** *Excluding non-response cases*

## *Intention to upgrade was higher among younger residents*

The propensity to upgrade was higher among residents aged below 45 years, with 79.6% of residents aged below 35 years and 68.9% aged 35 to 44 years intended to upgrade in the next five years (Table 6.11). Conversely, higher proportions of residents aged between 55 and 64 years (44.1%) and aged 65 years and above (64.7%) intended to downgrade.

Table 6.11
Type of Potential Move among Households who Intended to Move by Age

| Age Group (Years) | Type of Potential Move | | | Total | |
|---|---|---|---|---|---|
| | Downgrade | Lateral | Upgrade | % | N |
| **Below 35** | 5.7 | 14.7 | 79.6 | 100.0 | 16,728 |
| **35 – 44** | 11.2 | 19.9 | 68.9 | 100.0 | 45,001 |
| **45 – 54** | 20.2 | 25.7 | 54.1 | 100.0 | 35,631 |
| **55 – 64** | 44.1 | 20.2 | 35.7 | 100.0 | 29,377 |
| **65 & Above** | 64.7 | 16.8 | 18.5 | 100.0 | 19,024 |
| **All** | **26.4** | **20.4** | **53.2** | **100.0** | **145,760** |

## 6.3 Housing Aspirations

This section examines the housing aspirations of residents, which are often influenced by a myriad of factors such as financial capacity, economic situation, socio-economic profile, lifestyle preferences, and housing policies and provisions. In the survey, residents were asked to identify the type of housing unit they would be most content living in over the long term. Housing contentment refers to a household's overall satisfaction with a particular type of housing, based on how well it meets their long-term needs, expectations, and preferences. For some residents, this could be their ideal or dream home, while for others, it might be the realistic housing type that would provide sufficient or even lasting satisfaction. Housing aspiration is assessed by comparing the flat type households currently live in with the housing type they would be content with. Individuals with higher incomes tend to aspire to own bigger homes, while those with lower incomes may prioritise affordability and basic amenities. Housing aspirations also evolve throughout different stages of life.

### *Aspirations for better housing moderated, more households content with smaller flat type compared with last decade*

The proportion of households aspiring for better housing[19] declined from 35.0% in 2013 and 35.2% in 2018 to 29.7% in 2023/24 (Chart 6.8). Conversely, the proportion of those content with smaller flat types increased to 17.6%. These shifts reflect an ageing population. Nevertheless, households content with their present flat type remained the predominant group (52.7%).

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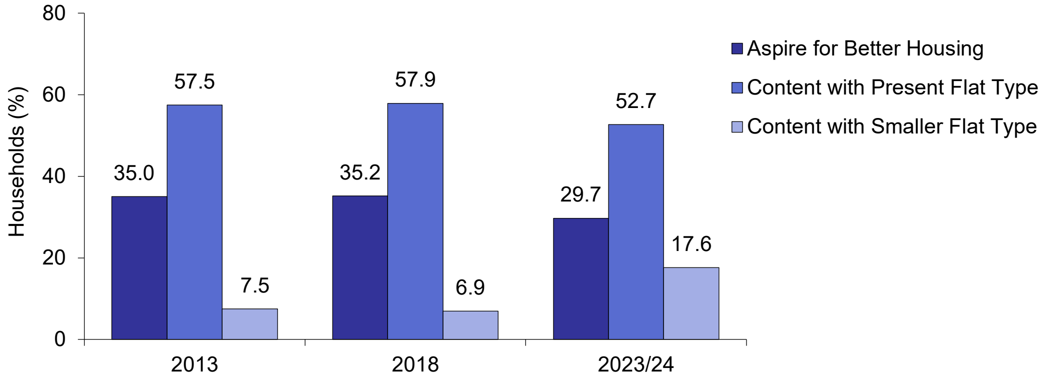
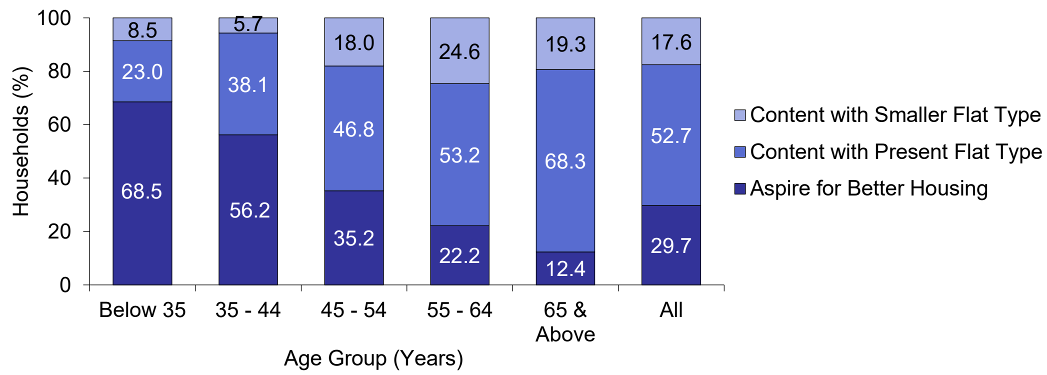
[19] Aspiration for better housing refers to households who are content with a flat type that is bigger than their present flat type, a private property or rental households who aspire to own a flat.

Chart 6.8
Housing Aspirations by Year




Housing aspirations varied with residents' age, with a general trend showing that the desire for better housing declined as age increased. In 2023/24, 68.5% of those aged below 35 years aspired to upgrade, whereas this proportion fell to just 12.4% among those aged 65 years and above (Chart 6.9). In contrast, the proportion of households content with their present flat type increased with age, from 23.0% among those aged below 35 years to 68.3% among those aged 65 years and above.

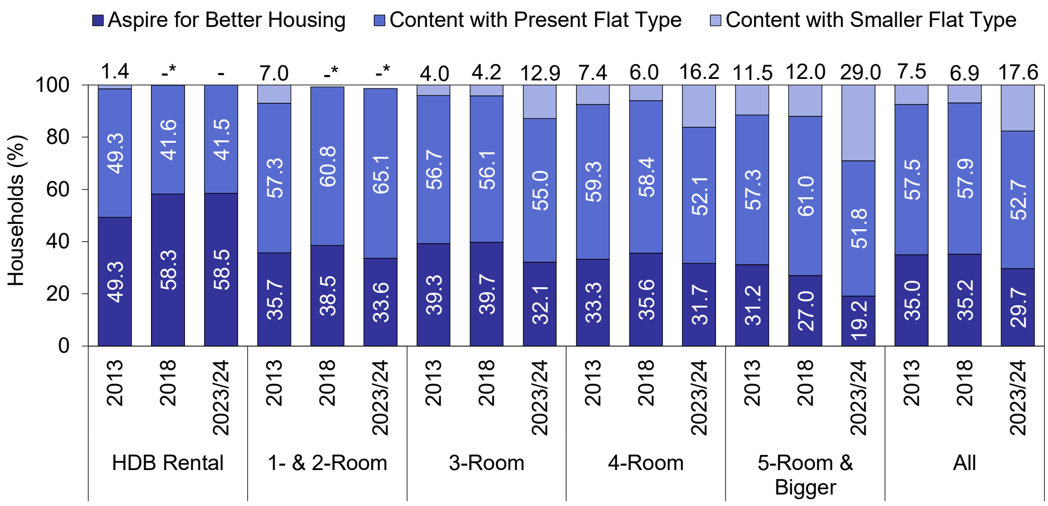
Chart 6.9
Housing Aspirations by Age




### *Higher housing aspirations among households in HDB rental flats*

Compared with 2018, there was a consistent decline in the proportion of households aspiring for better housing across various flat types, except for those living in HDB rental flats which maintained at about 58% in 2023/24 (Chart 6.10). The proportion of households content with their present flat type was higher among those living in 1- and 2-room flats than in other flat types, due to a higher proportion of older households residing in these flats who were more likely to be content with their present flat type as seen in Chart 6.9. Additionally, it was observed that the proportion of households living in 5-room and bigger flats who aspired for better housing was lower (19.2%), while the proportion content with smaller flat types was higher (29.0%) compared with other flat types. The rising property prices in recent years could have led these households to adjust their expectations in line with housing market conditions.

Chart 6.10
Housing Aspirations by Flat Type and Year

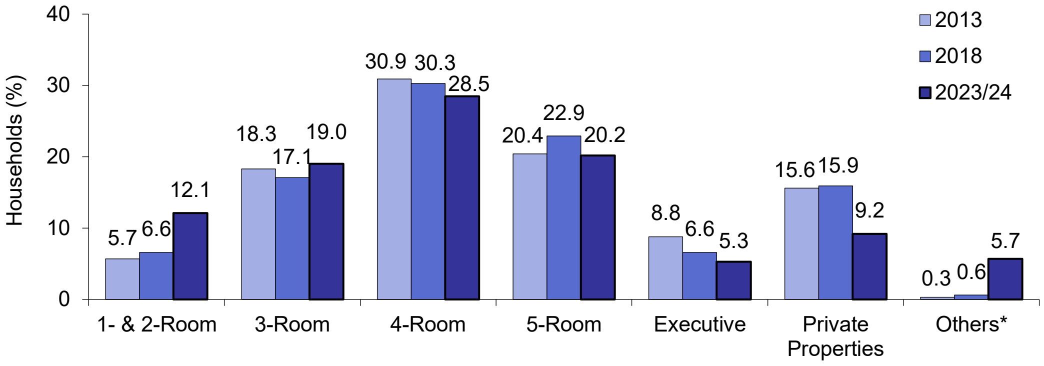



** Values with high coefficient of variation (CV) were dropped*

### *Increased proportion of households content with 3-room and smaller flats*

4-room flats remained the flat type with the highest proportion of households indicating they would be content with (Chart 6.11), despite a slight decline from 30.3% in 2018 to 28.5% in 2023/24. Similar slight declines were observed for 5-room and Executive flats over the same periods. The proportion of households content with private properties decreased significantly from 15.9% in 2018 to 9.2% in 2023/24. Conversely, proportionately more households were content with 1- and 2-room flats, increasing from 6.6% in 2018 to 12.1% in 2023/24, while 3-room flats also saw an increase from 17.1% in 2018 to 19.0% in 2023/24.

Chart 6.11
Housing Type Content with by Year




** Including retirement villages, kampong houses, private-assisted living development, nursing home, rent a co-living space and overseas properties*

As observed earlier, younger residents tended to have higher housing aspirations. Among residents aged below 35 years, a higher proportion were content with a 5-room flat (30.2%) or private housing (26.9%), whereas for those aged between 35 and 54 years, the proportions were higher for 4-room and 5-room flats. Residents aged 55 years and above were generally content with 3-room and 4-room flats (Table 6.12).

Table 6.12
Housing Type Content with among HDB Households by Age

<table>
<tr><th rowspan="2" colspan="2">Housing Type Content with</th><th colspan="10">Age Group (Years)</th><th rowspan="2">All</th></tr>
<tr><th colspan="2">Below 35</th><th colspan="2">35 – 44</th><th colspan="2">45 – 54</th><th colspan="2">55 – 64</th><th colspan="2">65 & Above</th></tr>
<tr><td colspan="13">HDB</td></tr>
<tr><td colspan="2">1- & 2-Room</td><td colspan="2">1.3</td><td colspan="2">1.9</td><td colspan="2">7.4</td><td colspan="2">15.2</td><td colspan="2">20.1</td><td>12.1</td></tr>
<tr><td colspan="2">3-Room</td><td colspan="2">6.1</td><td colspan="2">7.3</td><td colspan="2">15.7</td><td colspan="2">21.8</td><td colspan="2">27.5</td><td>19.0</td></tr>
<tr><td colspan="2">4-Room</td><td colspan="2">20.6</td><td colspan="2">25.5</td><td colspan="2">30.4</td><td colspan="2">30.4</td><td colspan="2">28.7</td><td>28.5</td></tr>
<tr><td colspan="2">5-Room</td><td colspan="2">30.2</td><td colspan="2">29.1</td><td colspan="2">22.5</td><td colspan="2">15.7</td><td colspan="2">15.7</td><td>20.2</td></tr>
<tr><td colspan="2">Executive</td><td colspan="2">6.0</td><td colspan="2">9.3</td><td colspan="2">6.3</td><td colspan="2">5.1</td><td colspan="2">2.5</td><td>5.3</td></tr>
<tr><td colspan="13">Private</td></tr>
<tr><td colspan="2">Executive Condominium</td><td>6.9</td><td rowspan="3">26.9</td><td>5.2</td><td rowspan="3">19.4</td><td>3.6</td><td rowspan="3">11.2</td><td>1.1</td><td rowspan="3">5.5</td><td>0.6</td><td rowspan="3">2.3</td><td>2.5</td></tr>
<tr><td colspan="2">Condominium/Apartment</td><td>10.0</td><td>8.9</td><td>4.5</td><td>2.5</td><td>0.8</td><td>3.9</td></tr>
<tr><td colspan="2">Landed Properties</td><td>10.0</td><td>5.3</td><td>3.1</td><td>1.9</td><td>0.9</td><td>2.8</td></tr>
<tr><td colspan="2">Others*</td><td colspan="2">8.9</td><td colspan="2">7.5</td><td colspan="2">6.5</td><td colspan="2">6.3</td><td colspan="2">3.2</td><td>5.7</td></tr>
<tr><td rowspan="2">Total</td><td>%</td><td colspan="2">100.0</td><td colspan="2">100.0</td><td colspan="2">100.0</td><td colspan="2">100.0</td><td colspan="2">100.0</td><td>100.0</td></tr>
<tr><td>N**</td><td colspan="2">57,604</td><td colspan="2">178,728</td><td colspan="2">242,487</td><td colspan="2">277,612</td><td colspan="2">340,452</td><td>1,096,883</td></tr>
</table>

** Including private-assisted living development, nursing home, rent a co-living space and overseas properties*
*** Excluding non-response cases*

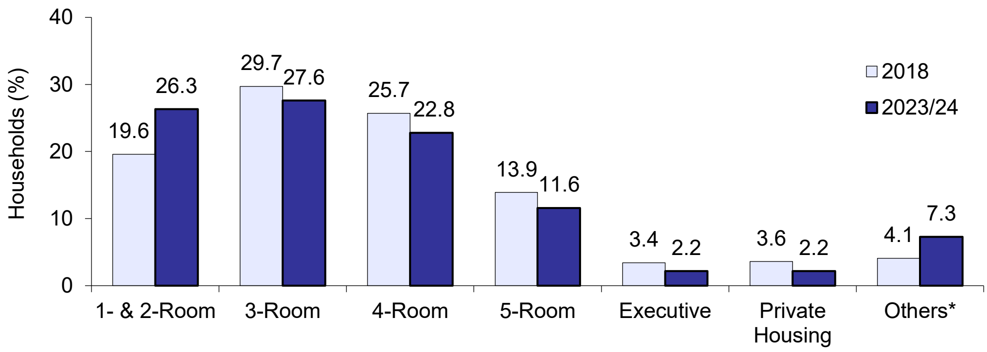
## 6.4 Preferred Housing Type when Old

With the rapidly ageing population in HDB towns/estates, it is important to understand the housing needs and preferences of residents in old age. While younger households have higher housing aspirations, higher proportions would consider smaller housing types for their old age.

### *3-room and smaller flats were the most preferred housing for old age*

Close to one-quarter of households (27.6%) preferred to live in 3-room flats in their old age (Chart 6.12). This was followed by 1-room and 2-room flats (26.3%) and 4-room flats (22.8%). Compared with 2018, preferences for 3-room to Executive flats and private housing units decreased in 2023/24, matched by an increase in the proportion who preferred 1-room and 2-room flats and other housing arrangements, such as private assisted-living developments or nursing homes. The increase in the preference for smaller flat types could be due to the increase in supply of 2-room Flexi flats since 2015 to meet the housing needs of residents aged 55 years and above who wanted to right-size to a smaller flat.

Chart 6.12
Preferred Housing Type for Old Age by Year




* *Including private-assisted living development, nursing home, rent a co-living space and overseas properties*

Households aged below 45 years were more likely to prefer 3-room and 4-room flats for their old age (Table 6.13), even though they tended to aspire for bigger housing types as seen in Table 6.12. On the other hand, proportionately more among those aged 45 years and above preferred 3-room and smaller flats for their old age. It was also observed that the preference for 3-room and smaller flat types for old age increased with age, indicating that households were cognisant of the type of housing that would cater to their needs in old age.

Table 6.13
Preferred Housing Type for Old Age among HDB Households by Age

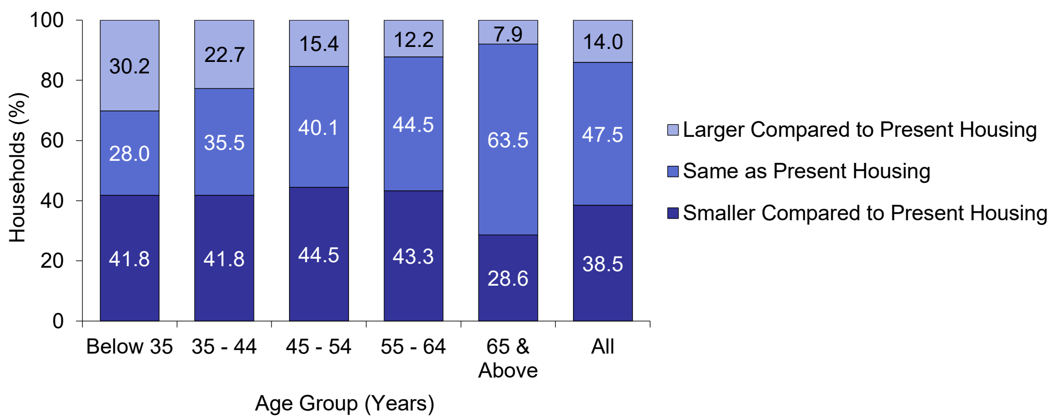
| Preferred Housing Type for Old Age | | Age Group (Years) | | | | | All |
|---|---|---|---|---|---|---|---|
| | | Below 35 | 35 – 44 | 45 – 54 | 55 – 64 | 65 & Above | |
| **1- & 2-Room** | | 15.2 | 19.7 | 25.6 | 30.0 | 29.1 | 26.3 |
| **3-Room** | | 24.3 | 24.5 | 27.8 | 27.8 | 29.6 | 27.6 |
| **4-Room** | | 21.8 | 22.7 | 21.7 | 23.2 | 23.3 | 22.8 |
| **5-Room** | | 16.7 | 14.0 | 10.9 | 8.9 | 12.1 | 11.6 |
| **Executive** | | 2.8 | 2.9 | 2.4 | 2.2 | 1.8 | 2.2 |
| **Private Housing** | | 7.6 | 5.1 | 2.5 | 1.0 | 0.5 | 2.2 |
| **Others*** | | 11.6 | 11.1 | 9.1 | 6.9 | 3.6 | 7.3 |
| **Total** | **%** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| | **N**** | 57,434 | 178,512 | 242,751 | 277,781 | 340,748 | 1,097,225 |

* *Including private-assisted living development, nursing home, rent a co-living space and overseas properties*
** *Excluding non-response cases*

## *Majority of seniors preferred to remain in their current flat type for old age*

Among those below 65 years old, about four in ten preferred to right-size to a smaller flat type in old age (Chart 6.13). The proportion who preferred a bigger housing type in old age was higher among those aged below 35 years (30.2%). This proportion decreased to 7.9% for those aged 65 years and above as most of them preferred to remain in their present flat type for old age (63.5%).

Chart 6.13
Housing Preference for Old Age by Age*




* *Excluding residents who preferred to move to private-assisted living development, nursing home, rent a co-living space and overseas properties*

## 6.5 Summary of Findings

Among the 1,099,742 resident households living in HDB flats, 86.4% of them were headed by residents who were either married or had ever been married. Among them, about seven in ten had made at least one residential move since marriage, a decrease from 80.0% in 2018. The decline in residential mobility compared with 2018 could be attributed to a reduced proportion of households living with parents or relatives after marriage, and an increase in the purchase of 4-room and bigger flat types, particularly among the younger households, as a higher proportion of them were able to move into their purchased flat upon marriage. The number of residential moves varied with one's life cycle stage. Overall, among households who had moved at least once since their marriage, the average length of residence in the previous housing unit was 10.2 years and had remained largely unchanged over the past 15 years.

Among the households who had indicated at least one change in residence since marriage, 56.3% had upgraded, either from a rental unit to a sold flat, or from a smaller to bigger flat type. About 19.9% of households had made lateral moves (i.e., across similar flat types or from one rental unit to another), while the remaining 23.8% had downgraded to a smaller flat type or moved from private housing to an HDB flat or from a sold flat to an HDB rental flat. Compared with 2018, the proportion of households who had upgraded decreased, while those who had made lateral moves or downgraded increased. The increased proportion of households who had downgraded could be associated with the increased supply of 2-room Flexi flats to support more seniors who wished to right-size and unlock the equity of the previous flat for retirement needs. Rising property prices in recent years could have also moderated the upgrading aspirations of some households and prompted them to stay put. In addition, couples who bought a 4-room or bigger flat type could have less of a need to upgrade as they had sufficient space to accommodate any expansions to their household. For households who moved laterally to the same flat type, it was mainly for the desire for a better living environment or proximity to family for mutual care and support.

Compared with 2018, the proportion of households who intended to move within the next five years increased slightly from 13.3% to 15.2% in 2023/24, while those planning to remain in their current flat decreased significantly from 76.8% to 55.6%

over the same period. This shift was accompanied by a marked increase in the proportion of households uncertain about their housing arrangements in the next five years, increasing from 9.9% in 2018 to 29.2% in 2023/24, with their financial situation being the main reason for this uncertainty. The inclination to move was also higher among younger residents aged below 35 years and 35 to 44 years.

Among the households who intended to move within the next five years, the proportions who intended to upgrade, move laterally and downgrade were 53.2%, 20.4% and 26.4%, respectively. These findings were comparable to 2018. In terms of the preferred housing type to move to, 4-room flats remained the most preferred flat type, followed by 5-room flats.

The proportion of households aspiring for better housing declined from 35.2% in 2018 to 29.7% in 2023/24, while the proportion content with smaller flat types increased from 6.9% in 2018 to 17.6% in 2023/24. These shifts reflect an ageing population. Nevertheless, households content with their present flat type remained the predominant group. The flat type with the highest proportion of households indicating that they were content with remained the 4-room flats.

Close to one-quarter of households (27.6%) preferred to live in 3-room flats in their old age, followed by 1-room and 2-room flats (26.3%) and 4-room flats (22.8%). Compared with 2018, preferences for 3-room to Executive flats and private housing units decreased in 2023/24, matched by an increase in the proportion who preferred 1-room and 2-room flats and other housing arrangements, such as private assisted-living developments or nursing homes.

*Part 2 - Conclusion*

# Housing Satisfaction and Preferences

*Part 2*

# Housing Satisfaction and Preferences

## Conclusion

The physical living environment is a fundamental component of HDB living and contributes to overall life satisfaction. HDB monitors residents' satisfaction with the built environment and housing preferences regularly, to better understand the evolving needs and lifestyle patterns across various demographic segments.

### *Satisfaction with Physical Living Environment and Estate Facilities*

Satisfaction with the HDB physical living environment remained high over the years. This was evident in the high satisfaction levels achieved in residents' assessments of the internal and external aspects of the living environment such as their flat and neighbourhood, including connectivity. The aspects that required further improvement were noise (i.e., to mitigate noise generation) and cleanliness. The new Community Relations Unit, set to launch in 2025, is timely and could potentially help to resolve neighbourly disputes, including noise nuisances.

Satisfaction with estate facilities remained high. Beyond meeting residents' primary needs, these facilities also played a vital social role in fostering interaction, connection, and community bonding. Commercial facilities continued to be the most frequently used, underscoring their key role in supporting residents' daily needs. Meanwhile, green spaces, especially neighbourhood parks/common greens, regional parks, and roof/sky gardens, had seen increased usage, reflecting a growing appreciation for such amenities. As facility usage can shift over time with changes in resident demographics and preferences, regular reviews of facility provision are essential to ensure they remain aligned with evolving community needs.

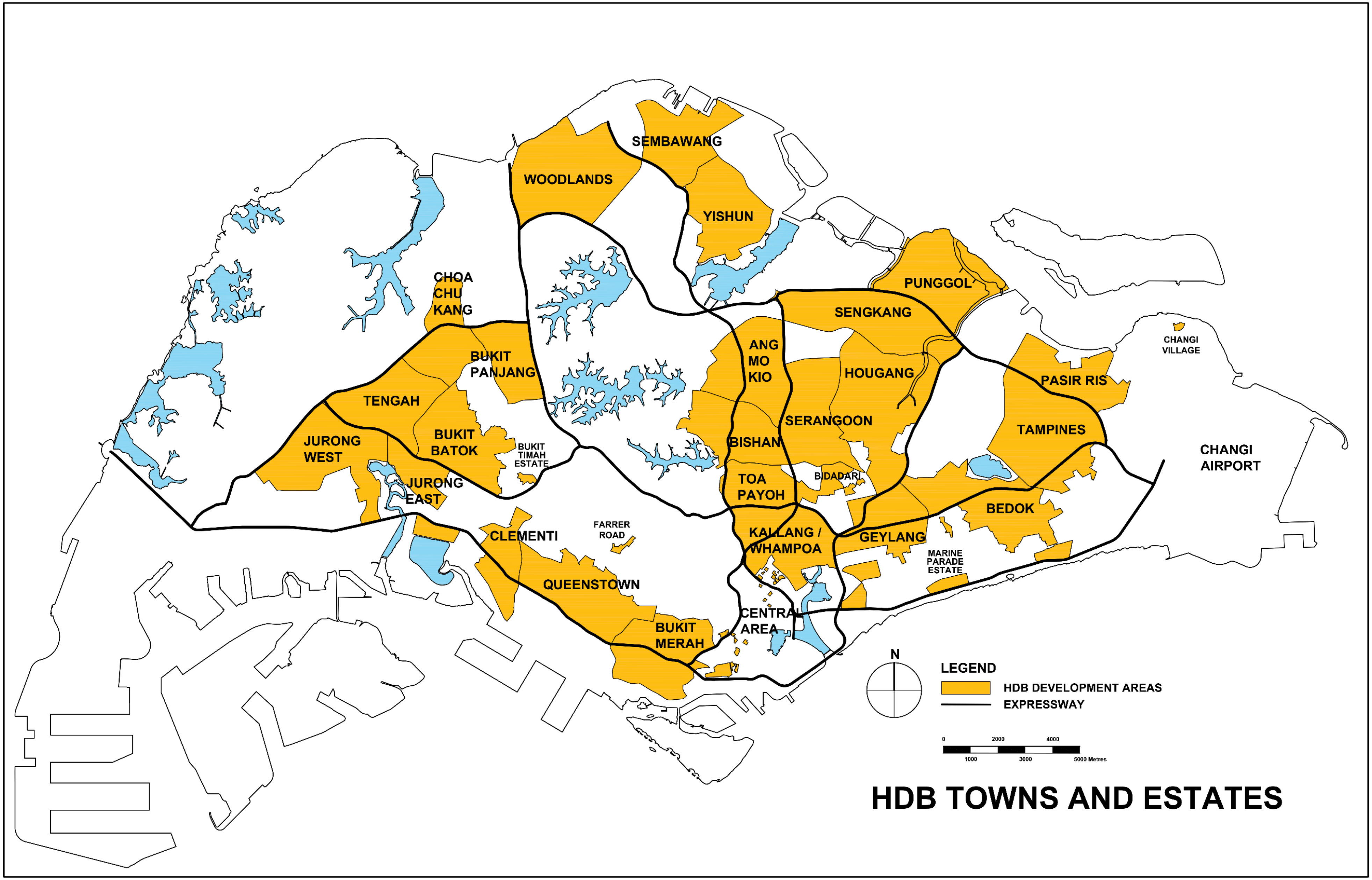
Residents' perception of their flat as value for money had also improved. While majority of residents were proud of their flat, there has also been an observed increase in those who were neutral about their flat as housing was increasingly considered a basic necessity.

About four in ten HDB households worked remotely or had participated in home-based learning in the past year from the point of the survey. Majority of these households were satisfied with the remote working or learning conditions at home. Residents who worked remotely did so most frequently from home instead of alternative working spaces. This was indicative of the conducive home environment and preference to work from home.

### *Residential Mobility and Housing Aspirations*

The number of residential moves varied with one's life cycle stage. Generally, families without children made fewer residential moves than families with children. Additionally, couples who started with a 4-room or bigger flat type after marriage had a lower propensity to move compared with those who started in smaller flat types. The findings also showed that 4-room and 5-room flats were the most preferred housing types to move to for those who intended to move within the next five years. This suggests that these flat types are typically sought after by families to meet long-term housing needs.

Aspirations for better housing had moderated, while the proportion of households content with smaller flat types had increased. Nonetheless, households content with their present flat type remained the predominant group. In terms of the housing type for old age, majority of the seniors preferred to remain in their current flat type. While younger households have higher housing aspirations, higher proportions would consider smaller housing types for their old age.




# HDB TOWNS AND ESTATES

*Fulfilling **Dreams**, Building **Homes**, Creating **Communities***

HDB Hub 480 Lorong 6 Toa Payoh,
Singapore 310480
Tel: 6490-1111
HDB InfoWEB: www.hdb.gov.sg