2016 MEDIA CONSUMER EXPERIENCE AND ZERO TO FOURTEEN CONSUMER EXPERIENCE STUDIES

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CONTENT

EXECUTIVE SUMMARY

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Compared to past years, adults and children spent more time on a wider variety of media activities.

- Adults spent the most time on media-related content online, followed by non-media content online and watching Mediacorp.
- Children continued spending the most time watching Mediacorp, while increasing their time spent on content on other platforms. These other platforms exclude content on Free-to-Air (FTA) or Pay TV.

Adults' satisfaction with media services and content classification systems saw little change year-on-year.

- Adults were most satisfied with local media services' quality of reception, and Pay TV's content classification system.

More children were Internet and social media users, and at a younger age.

- Majority of children used the Internet at home, and YouTube was their favourite social media platform.

RESEARCH OBJECTIVES AND METHODOLOGY

RESEARCH OBJECTIVES

- The Infocomm Media Development Authority (“IMDA”) commissions the annual **Media Consumer Experience Study (“MCES”)** to:

  – Measure adult consumers’ satisfaction with media services and content classification systems;
  – Understand media consumption patterns across platforms and devices; and
  – Identify and analyse key changes in media preferences.

- The **Zero to Fourteen Consumer Experience Study (“CS”)** was conceptualized as a complementary study to the Media Consumer Experience Study. The CS focuses on children’s media consumption habits and preferences, in particular:

  – Traditional and online media consumption behaviour and habits; and
  – Social media habits and preferences.

METHODOLOGY

- The 2016 MCES and CS were conducted by Degree Census Consultancy Pte Ltd.
- Data for the MCES and CS were collected using different survey instruments, and questions on the same topic, e.g. time spent, were phrased differently in both questionnaires to cater to the different target audiences. Hence, we **do not encourage direct comparisons to be made between both studies**.

	MCES / Adults	CS / Children
Survey Methodology	• **Face-to-face interviews** (average 45 mins) • Fieldwork conducted between **March and May 2017**.	• **Face-to-face interviews** (average 30 mins) • Fieldwork conducted between **May and June 2017**.
Respondent Profile	• Representative sample of **2,000 Singapore Citizens and Permanent Residents aged 15 to 65 years old**.	• Representative sample of **1,200 Singapore Citizens and Permanent Residents aged 0 to 14 years old**, with the parents of those aged 0 to 6 years old answering on their behalf.

Note: Throughout this report, arrows in blue indicate a statistically significant increase from the previous year, while arrows in red indicate a statistically significant decrease.

GENERAL MEDIA CONSUMPTION

ADULTS SPENT THE MOST TIME ON ONLINE MEDIA, WHILE WATCHING MEDIACORP REMAINED CHILDREN'S TOP MEDIA ACTIVITY

- In spite of rising time spent online, adults still spent around 2.2 hours daily watching Mediacorp programmes on multiple platforms (Chart 1).
- Children's media diet were increasingly diversified, with rising time spent on non-FTA or Pay TV content and reading books (Chart 2).

Chart 1: Adults' top media activities in terms of daily time spent (hours)

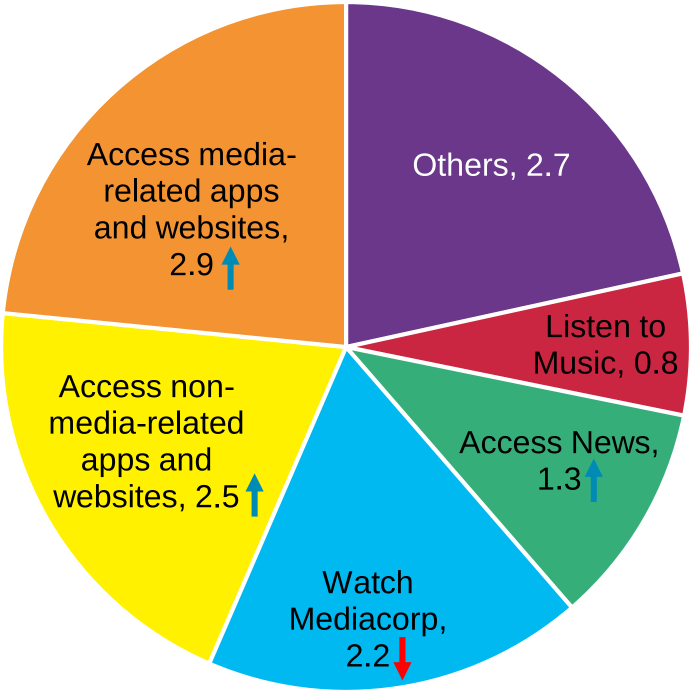

Chart 2: Children's top media activities in terms of daily time spent (hours)

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Note: Different survey instruments were used for the MCES and CS and questions on the same topic were phrased differently. Hence, we **do not encourage direct comparisons to be made between both studies.**

MAJORITY OF ADULTS AND CHILDREN HAVE WATCHED MEDIACORP PROGRAMMES

- Almost all adults (98.8%) have watched Mediacorp programmes (Chart 3), while this proportion was smaller amongst children, at 63.8% (Chart 4).

Chart 3: Adults who watched Mediacorp programmes

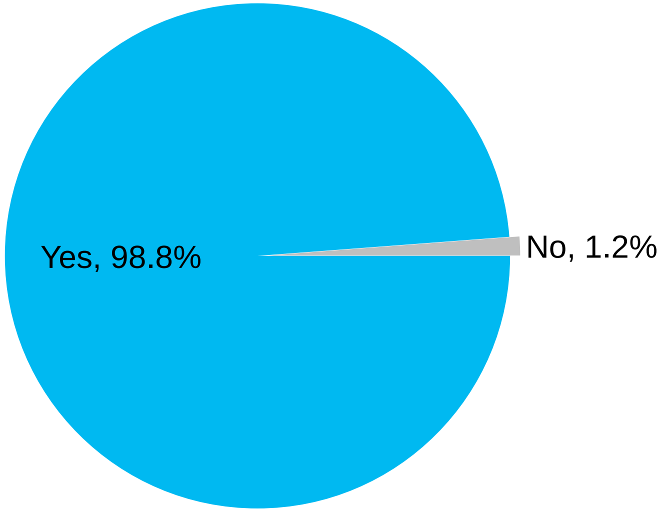
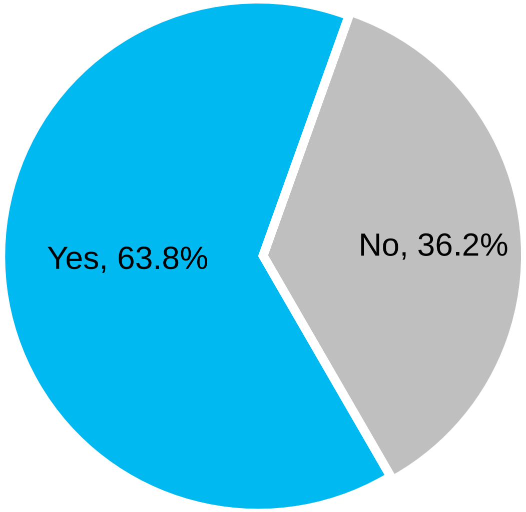


Chart 4: Children who watched Mediacorp programmes

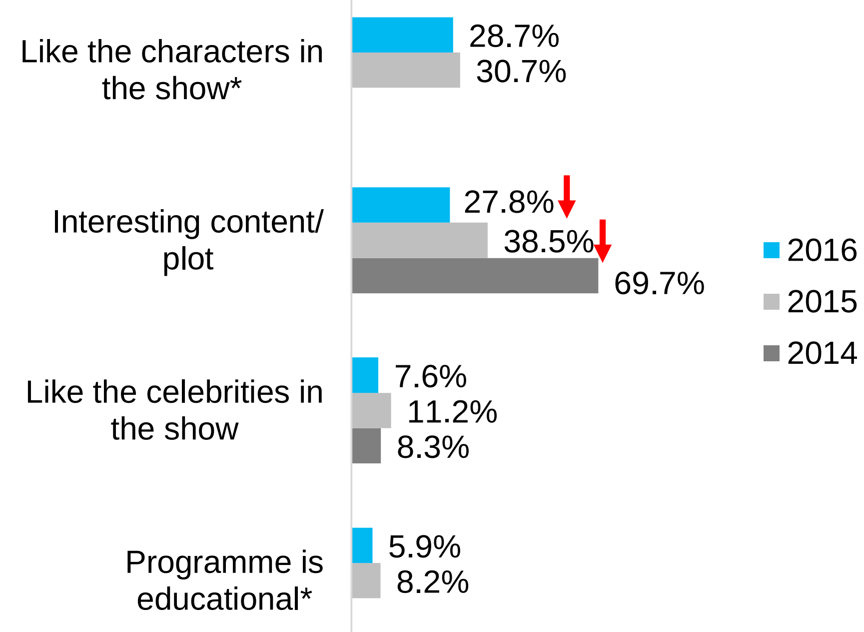


Note: Different survey instruments were used for the MCES and CS and questions on the same topic, such as time spent, were phrased differently. Hence, we **do not encourage direct comparisons to be made between both studies.**

CHILDREN LIKED MEDIACORP PROGRAMMES DUE TO THE SHOWS' CHARACTERS, AND INTERESTING CONTENT, PLOT OR STORYLINE

- On the other hand, the top reason for children not watching Mediacorp programmes was better programming available online (Chart 6).
- In particular, around one in five of the children aged 0 to 6 years old were not allowed to watch television.

Chart 5: Reasons for liking favourite Mediacorp programme



* Options were added in 2015's study.

Chart 4: Children who watched Mediacorp programmes

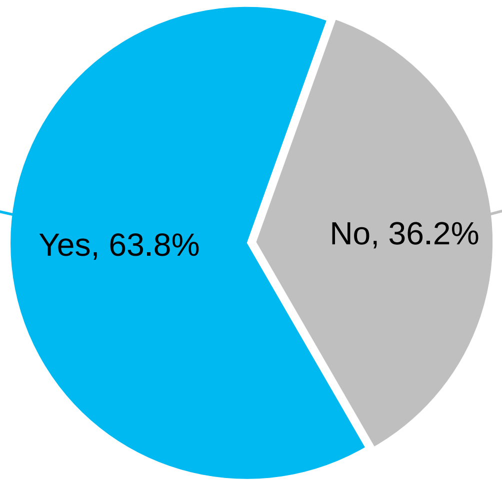
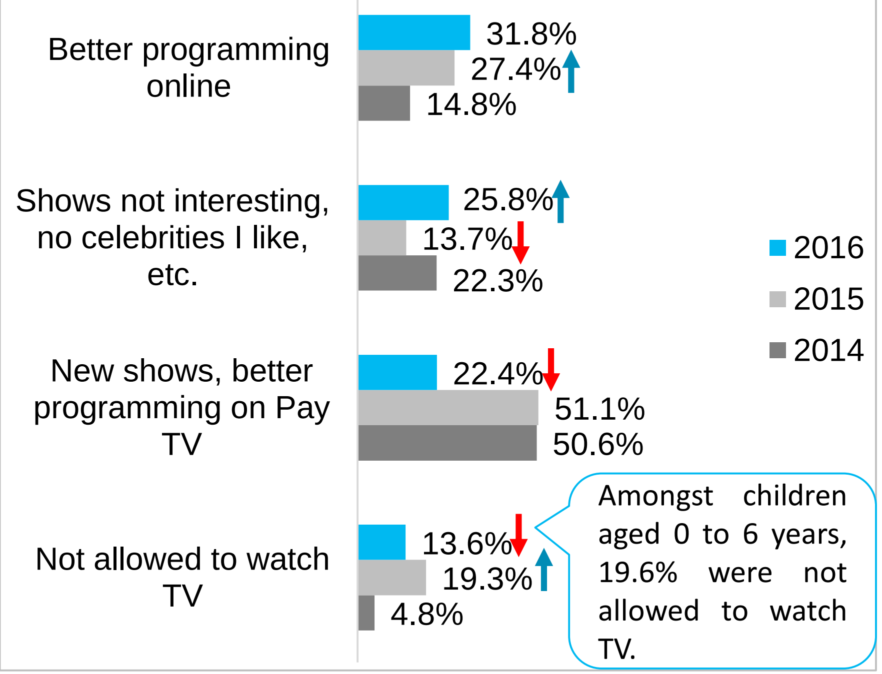
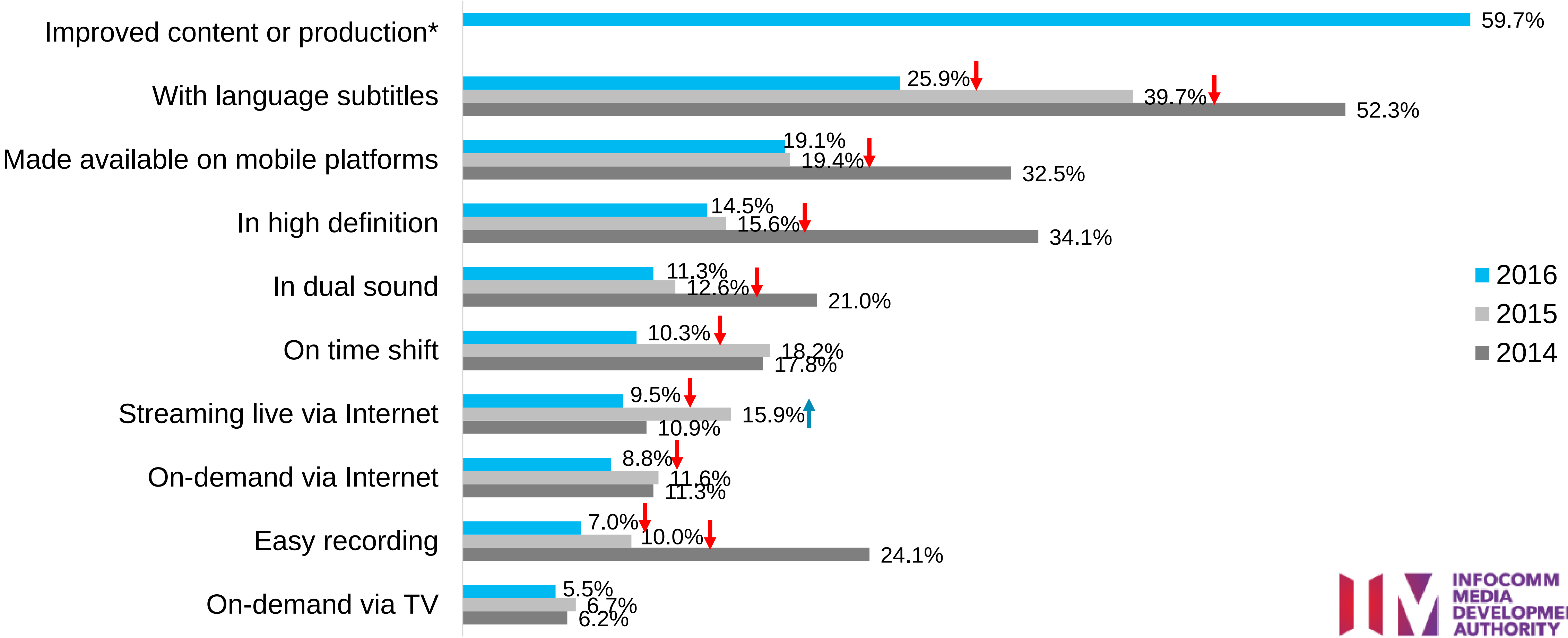


Chart 6: Reasons for seldom/ not watching Mediacorp TV



IMPROVED CONTENT OR PRODUCTION WAS ADULTS' TOP MOTIVATOR TO EITHER START WATCHING OR WATCH MORE MEDIACORP PROGRAMMES

Chart 7: Features encouraging Mediacorp consumption



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* The "improved content or production" option was newly added in this year's study.

MAJORITY OF ADULTS WERE ALSO PAY TV SUBSCRIBERS, ALTHOUGH SUBSCRIPTION DROPPED COMPARED TO PAST YEARS

- 64.3% of consumers were StarHub and/or Singtel Pay TV subscribers in 2016 (Chart 8), a drop from 68.2% in 2015 and 69.0% in 2014.
- More than half of the Pay TV subscribers were from StarHub TV, while around two in five were Singtel TV subscribers (Chart 9).

Chart 8: Adults who subscribed to Pay TV

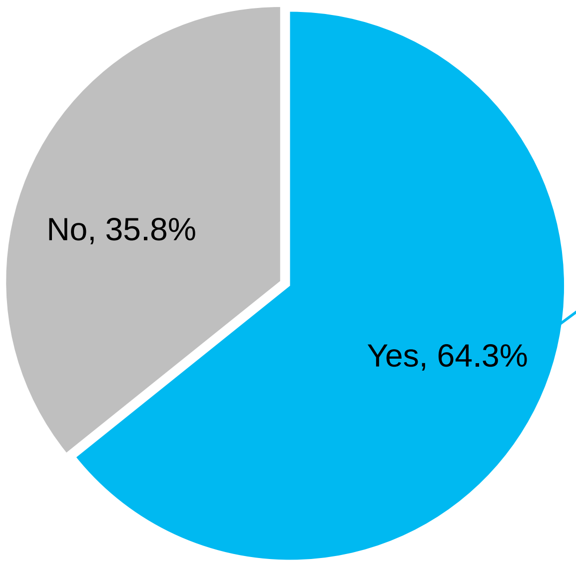
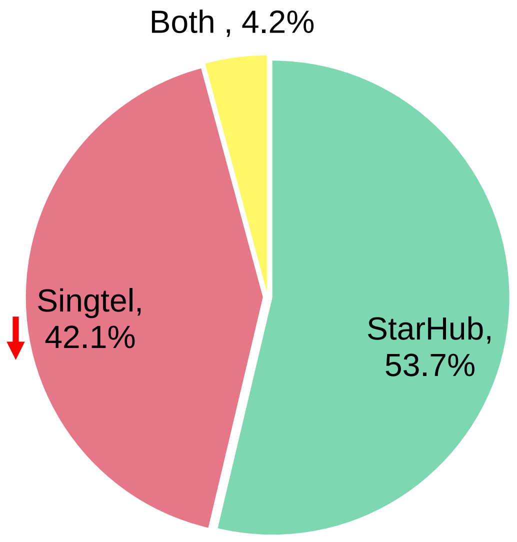


Chart 9: Pay TV Subscription



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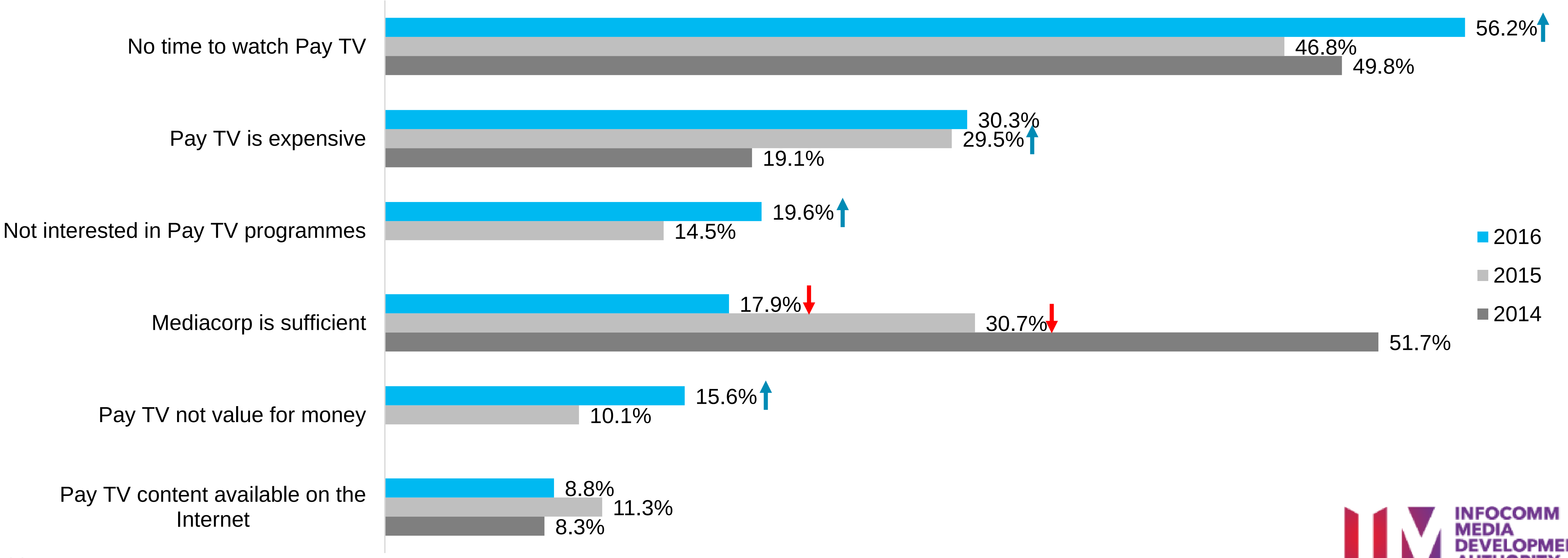
LACK OF TIME TO WATCH PAY TV REMAINED THE TOP REASON FOR NOT SUBSCRIBING TO THE SERVICE

- More consumers also chose not to subscribe to Pay TV due to a lack of interest in the programmes available (Chart 10).

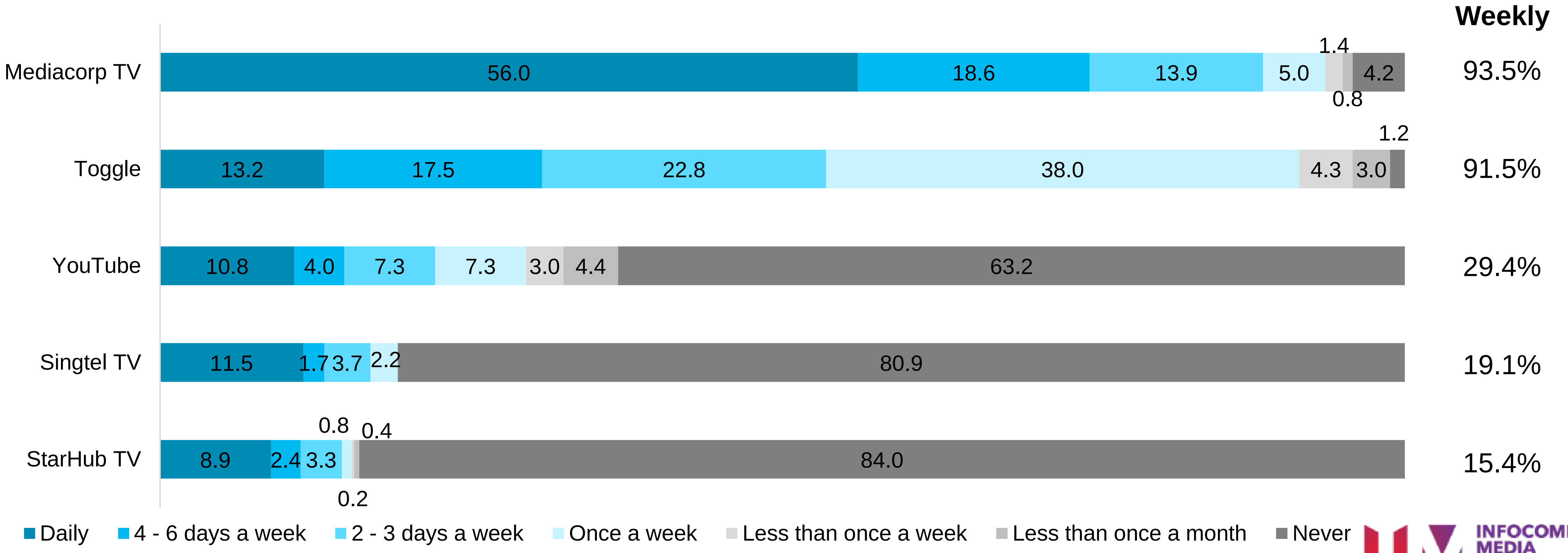
Chart 10: Reasons for not subscribing to Pay TV



ADULTS CONSUMED LOCAL CONTENT MOST OFTEN ON MEDIACORP PLATFORMS

- Amongst Mediacorp TV and Toggle consumers, more than nine in ten watched local content at least once a week (Chart 11).

Chart 11: Adults' frequency of watching local content

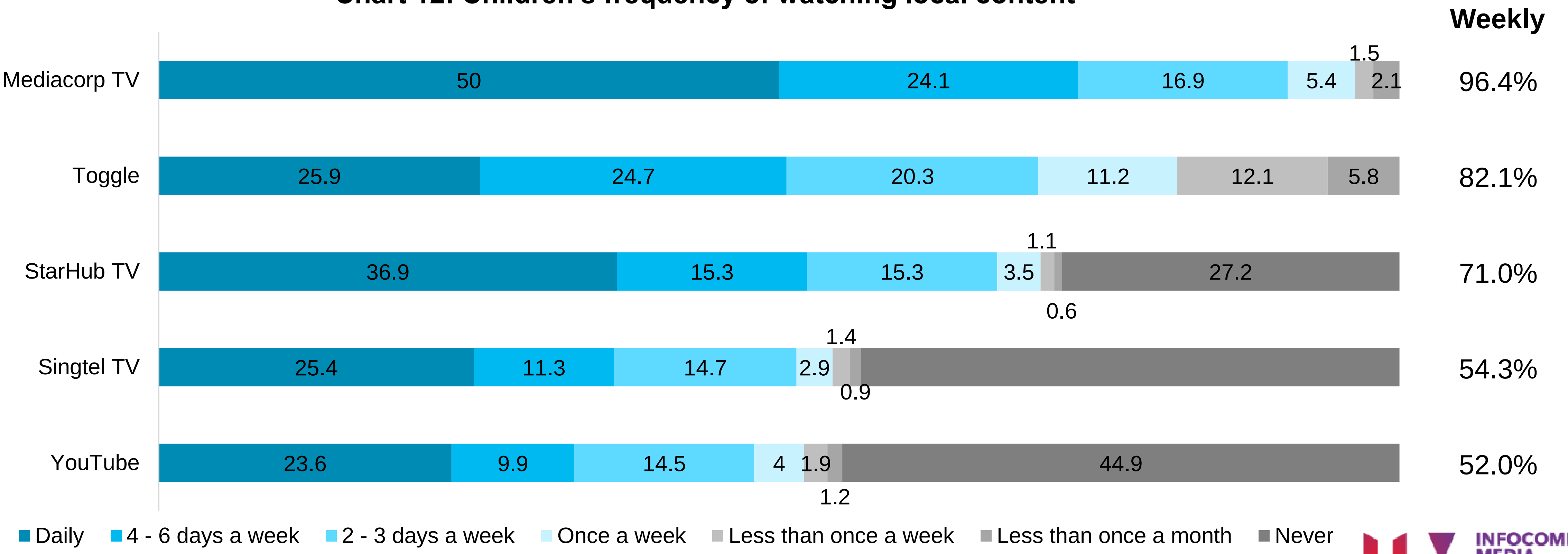


Note: Adult respondents were those who indicated that they spent time watching Mediacorp, Pay TV, videos, movies, or accessing media-related content via websites and apps.

WHILE COMPARED TO ADULTS, CHILDREN CONSUMED LOCAL CONTENT MORE OFTEN ACROSS ALL PLATFORMS EXCEPT TOGGLE

- Notably, amongst the children who watched videos online, more than half watched local content on YouTube weekly (Chart 12).

Chart 12: Children's frequency of watching local content



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Note: Children respondents were those who indicated that they spent time watching content on Mediacorp, Pay TV and other non-Mediacorp and Pay TV sources.

INCIDENCE OF MULTITASKING INCREASED WITH AGE; ADULTS WERE MORE INCLINED TO MULTITASK COMPARED TO CHILDREN

- The top paired multitasking devices – watching TV and using mobile devices – were the same for both adults and children.

Chart 13: Adults who used multiple devices at the same time

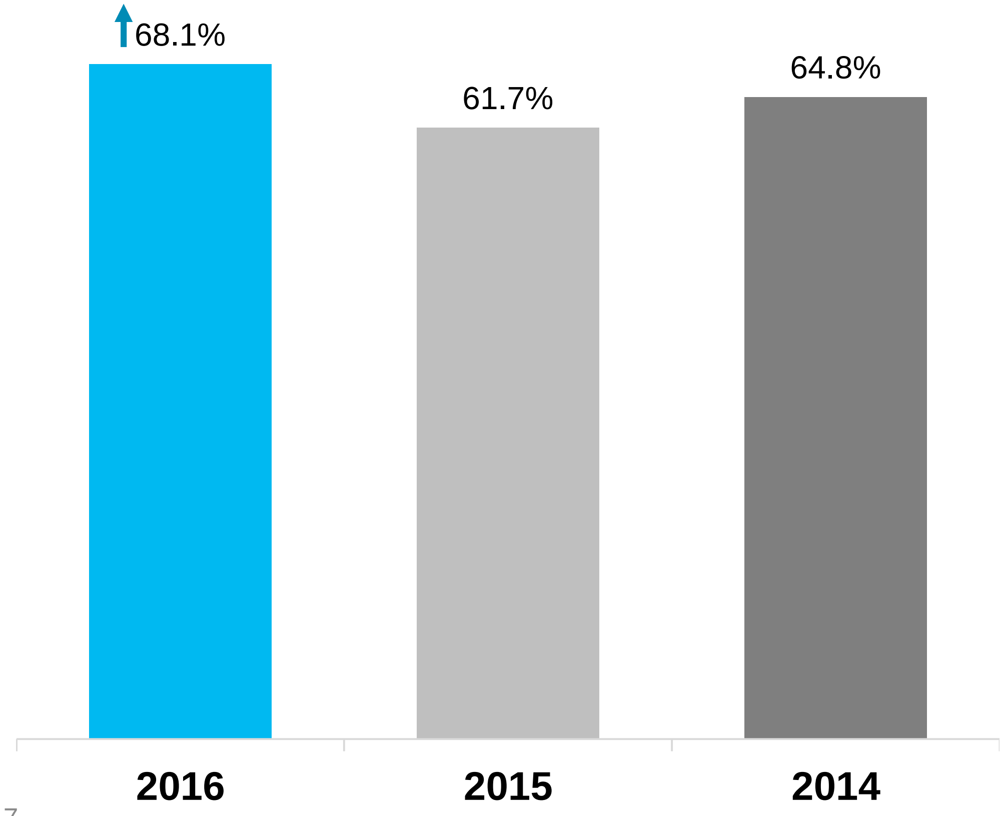


Chart 14: Children who ever used multiple devices at the same time

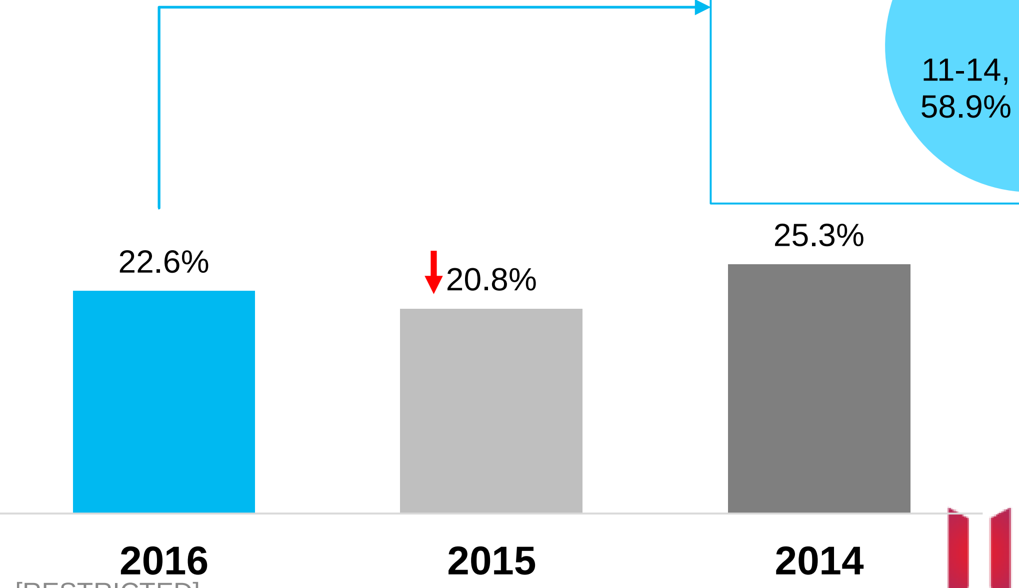
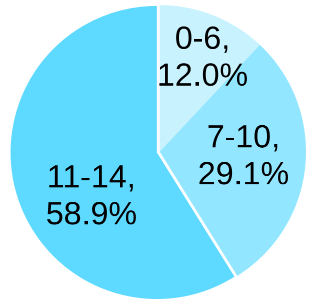


Chart 15: Ever used multiple devices at the same time – age breakdown



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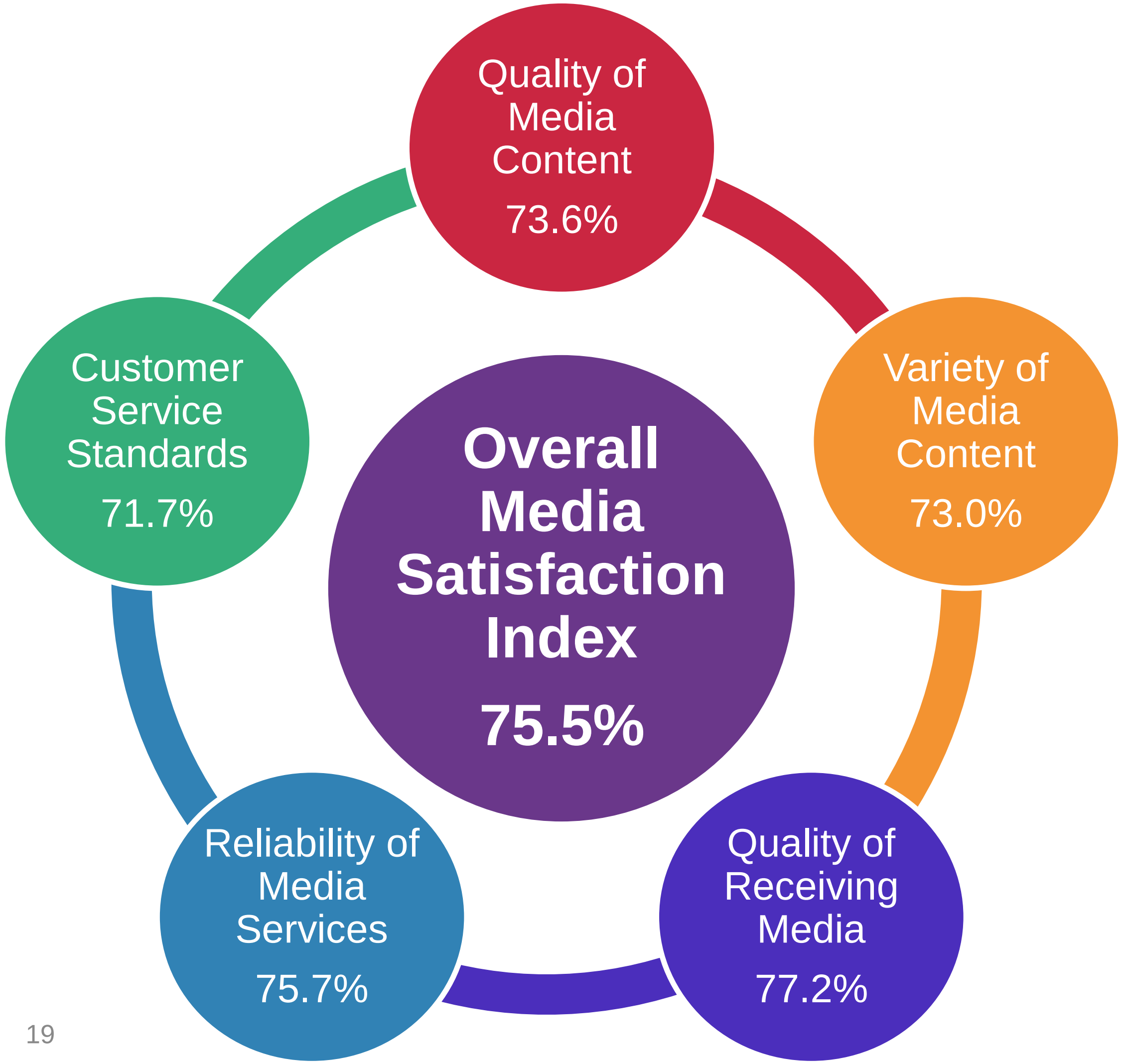
SATISFACTION WITH MEDIA SERVICES AND CONTENT CLASSIFICATION SYSTEMS

IN 2016, ADULT CONSUMERS RANGED FROM BEING SLIGHTLY SATISFIED TO SATISFIED WITH LOCAL MEDIA SERVICES



- The **Overall Media Satisfaction Index ("OMSI")** provides an indication of consumers' satisfaction with local media services, and comprises the five components listed on the left.

- The 2016 OMSI score of 75.5% indicates that on average, consumers ranged from being slightly satisfied to satisfied with local media services.

- The change in OMSI score from 2015 to 2016 was not statistically significant.

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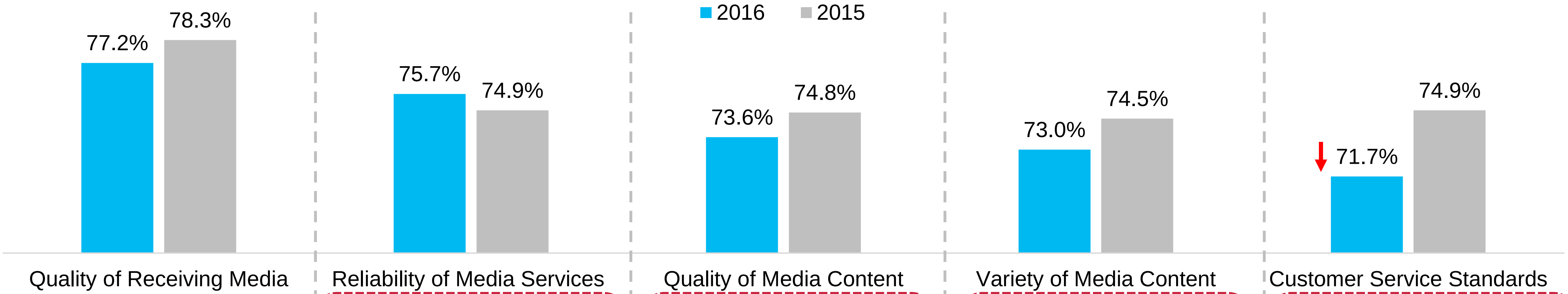
OF THE FIVE COMPONENTS MENTIONED PREVIOUSLY, ADULT CONSUMERS WERE MOST SATISFIED WITH THE QUALITY OF RECEIVING MEDIA

- Consumers were asked to score the different media platforms (e.g. Mediacorp TV, radio, websites, etc.) based on each platform's performance in the five separate components.
- In particular, consumers' satisfaction with the reliability of media services improved in 2016 (Chart 16).

Chart 16: Satisfaction with five components of the OMSI



Top 3 Platforms	Quality of Receiving Media	Reliability of Media Services	Quality of Media Content	Variety of Media Content	Customer Service Standards
1	Mediacorp TV (80.0%)	Mediacorp on TV (79.0%)	Newspapers (79.0%)	Internet websites (77.3%)	Singtel TV (73.1%)
2	Internet video (77.1%)	StarHub TV on TV (78.6%)	Internet websites (77.4%)	Applications (76.9%)	StarHub TV (71.3%)
3	Singtel TV (76.7%)	Singtel TV on TV (78.3%)	Applications (76.7%)	Newspapers (76.1%)	Mediacorp (70.6%)

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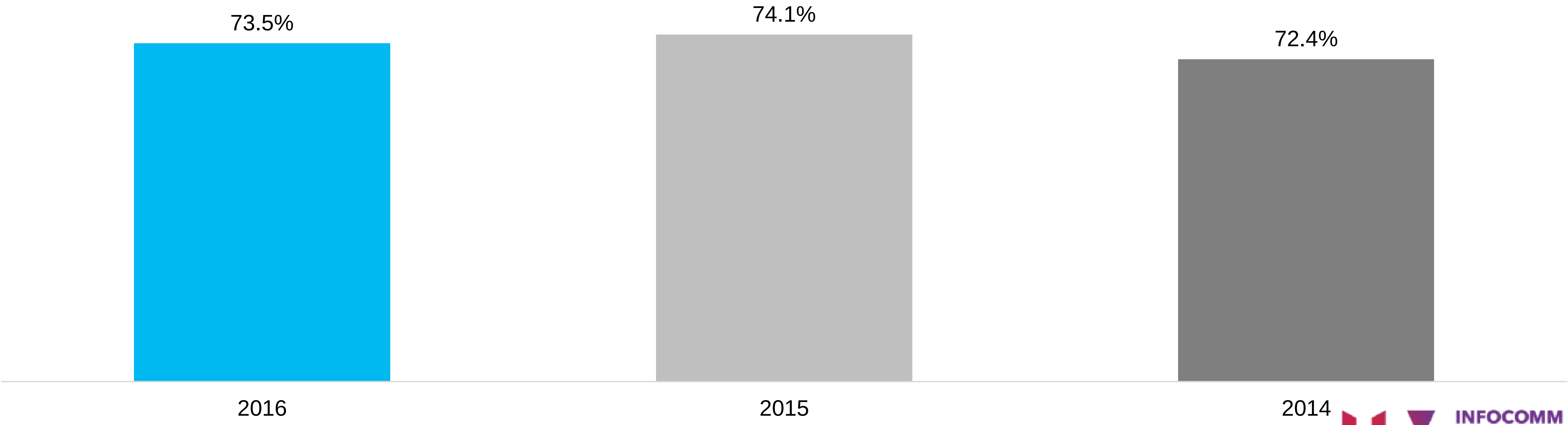
MAJORITY OF CONSUMERS WERE AT LEAST SLIGHTLY SATISFIED WITH LOCAL MEDIA CONTENT CLASSIFICATION SYSTEMS

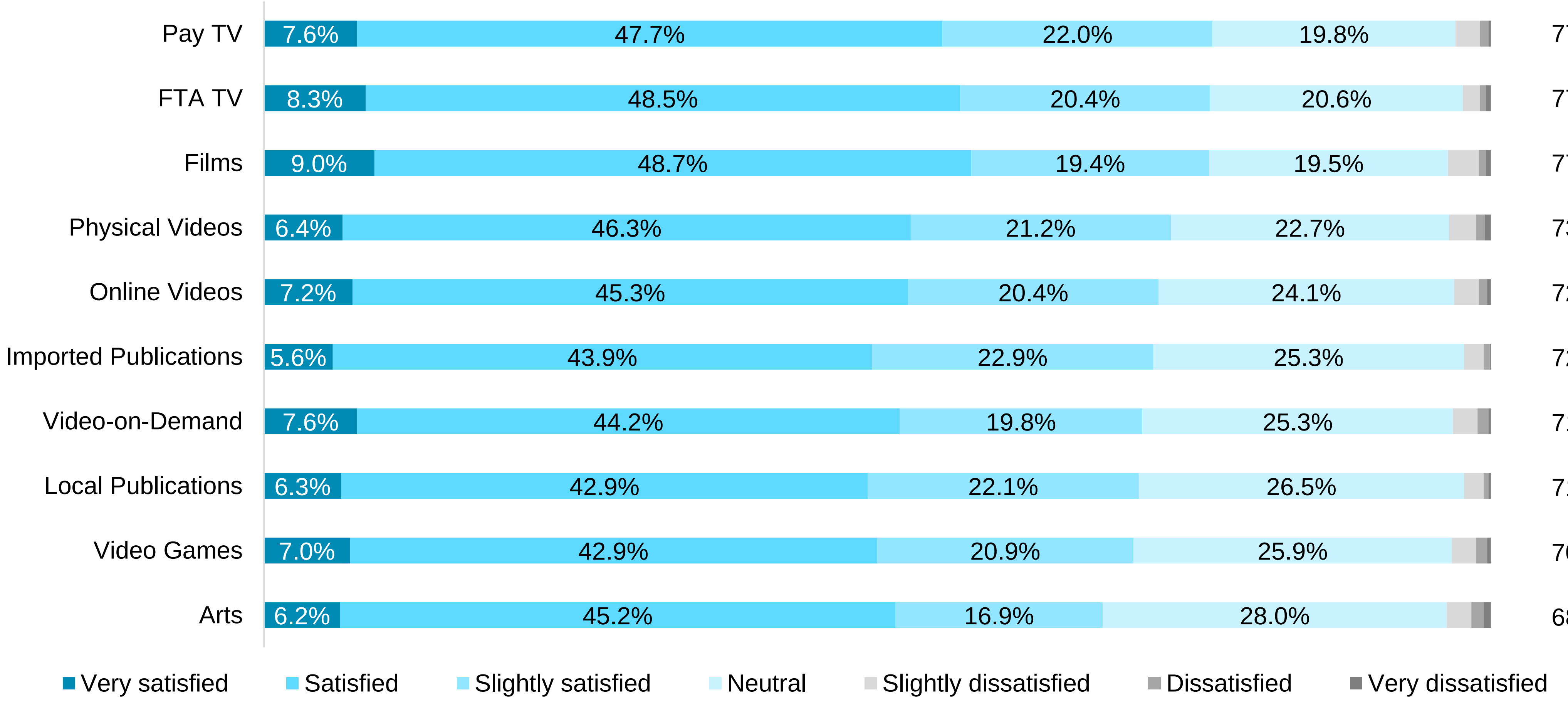
- Despite a slight dip compared to 2015, nearly three in four consumers remained slightly satisfied, satisfied or very satisfied with local media platforms' content classification systems in 2016 (Chart 17).

Chart 17: Satisfaction with Content Classification Systems



CONSUMERS WERE MOST SATISFIED WITH THE CONTENT CLASSIFICATION SYSTEMS OF PAY TV, FTA TV AND FILMS

Chart 18: Satisfaction with platforms' Content Classification Systems



At least slightly satisfied (%)

	2016	2015
Pay TV	77.3%	77.9%
FTA TV	77.2%	79.1%
Films	77.1%	75.1%
Physical Videos	73.9%	77.2%
Online Videos	72.9%	-%
Imported Publications	72.4%	68.1%
Video-on-Demand	71.6%↓	77.1%
Local Publications	71.3%	71.5%
Video Games	70.8%	72.2%
Arts	68.3%	68.4%

COMPARED TO OTHER PLATFORMS, CONSUMERS' AWARENESS AND USAGE OF FILMS CLASSIFICATION RANKED THE HIGHEST

- In addition, consumers felt that it was the most important to rate Films' content.

	Awareness of content classification system
Films	89.0%
FTA TV	85.8%
Pay TV	74.6%
Physical Videos	62.9%
Online Videos	57.4%

	Usage of content classification system
Films	46.2%
Pay TV	45.9%
FTA TV	45.1%
Online Videos	37.9%
Physical Videos	34.6%

	Importance of content classification system
Films	80.4%
FTA TV	79.3%
Pay TV	78.5%
Physical Videos	76.7%
Online Videos	76.0%

INTERNET AND SOCIAL MEDIA USAGE AND HABITS

MORE CHILDREN HAD USED THE INTERNET BEFORE, AND AT A YOUNGER AGE

- In general, children started using the Internet at about 5.8 years old, while almost half of these children used the Internet daily (Chart 20).

Chart 19: Use Internet for media and non-media activities

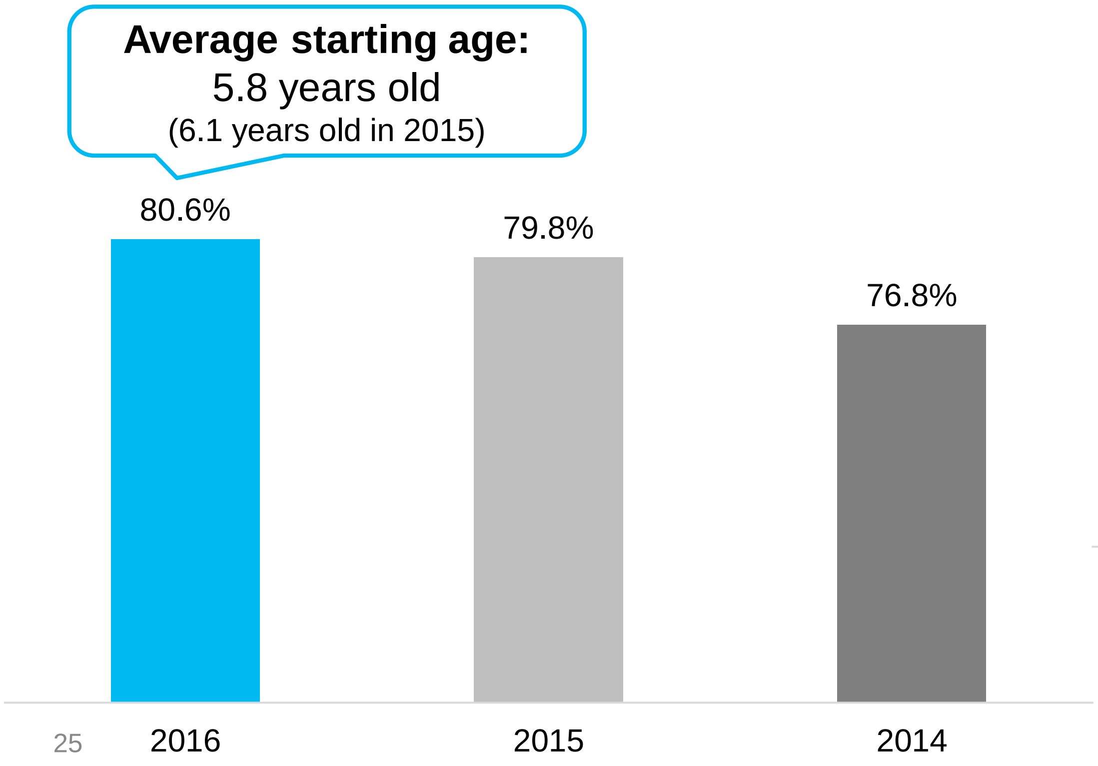
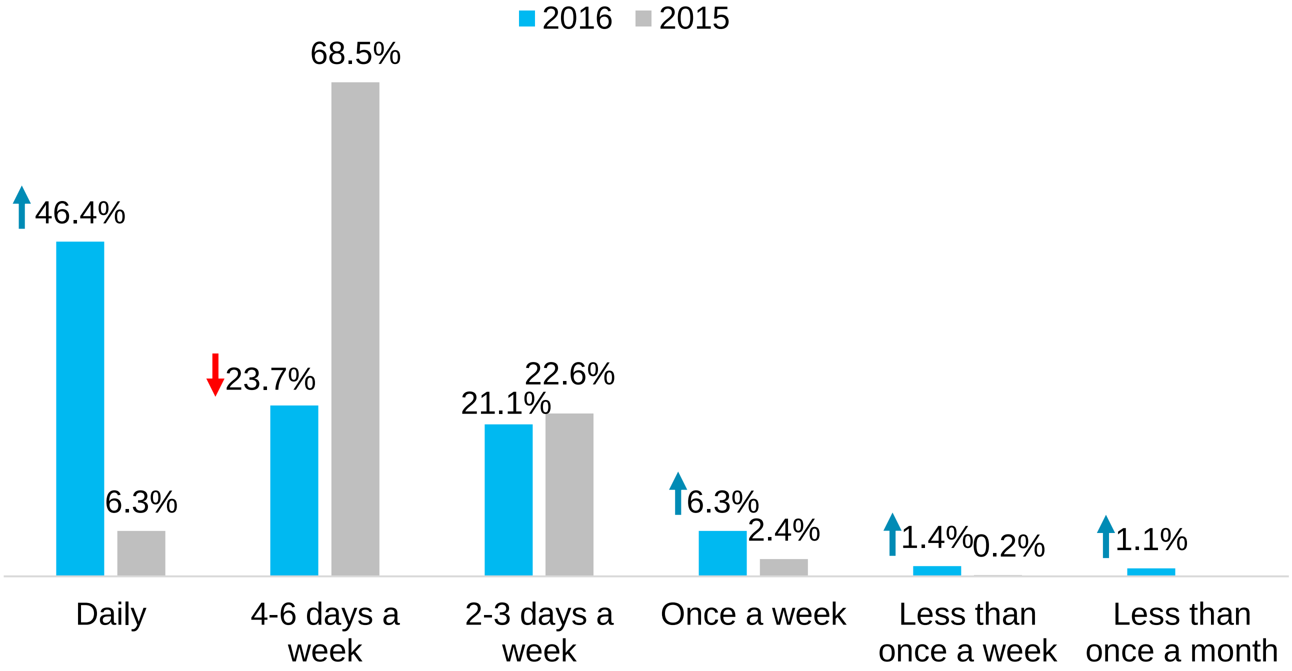


Chart 20: Frequency of using the Internet



THE SMART PHONE PLAYED A CENTRAL ROLE IN CHILDREN'S INTERNET ACCESS

Chart 21: Top devices ever used to access the Internet

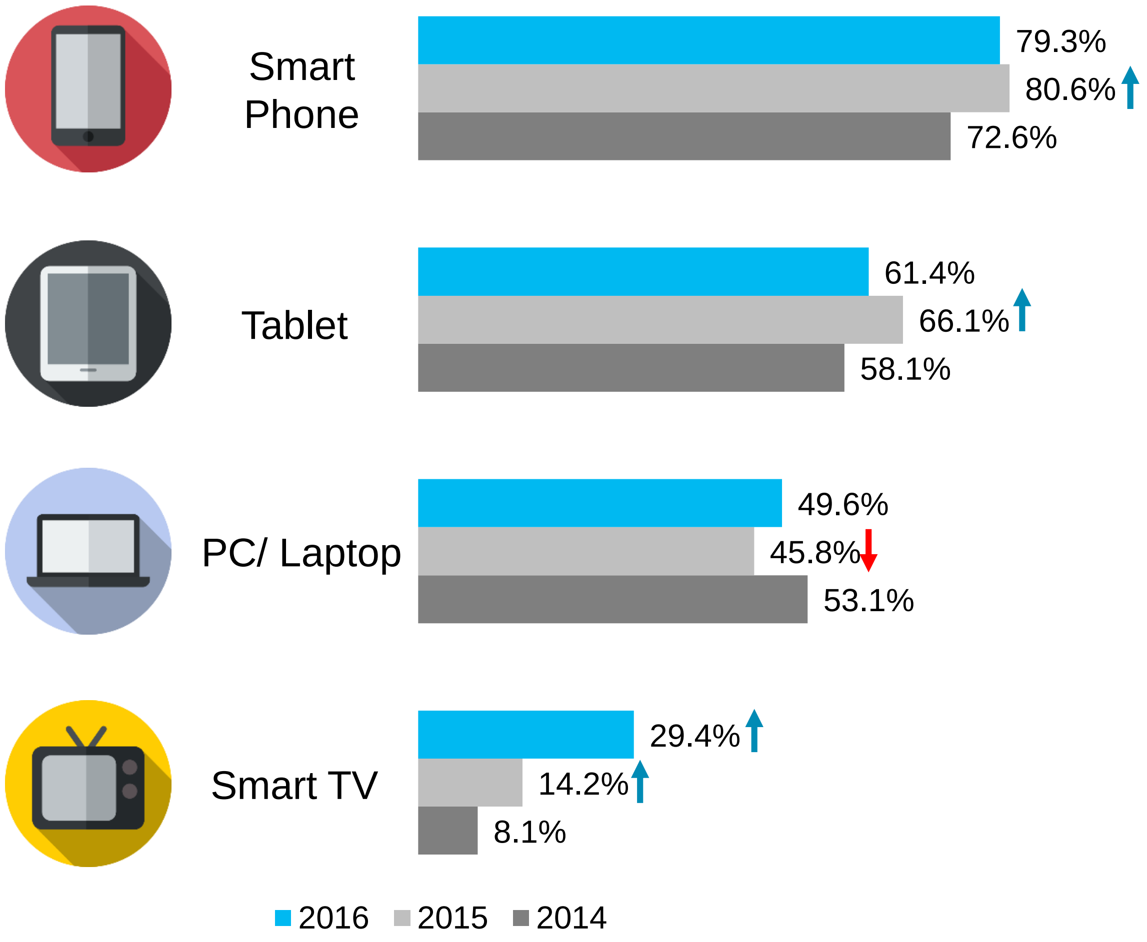
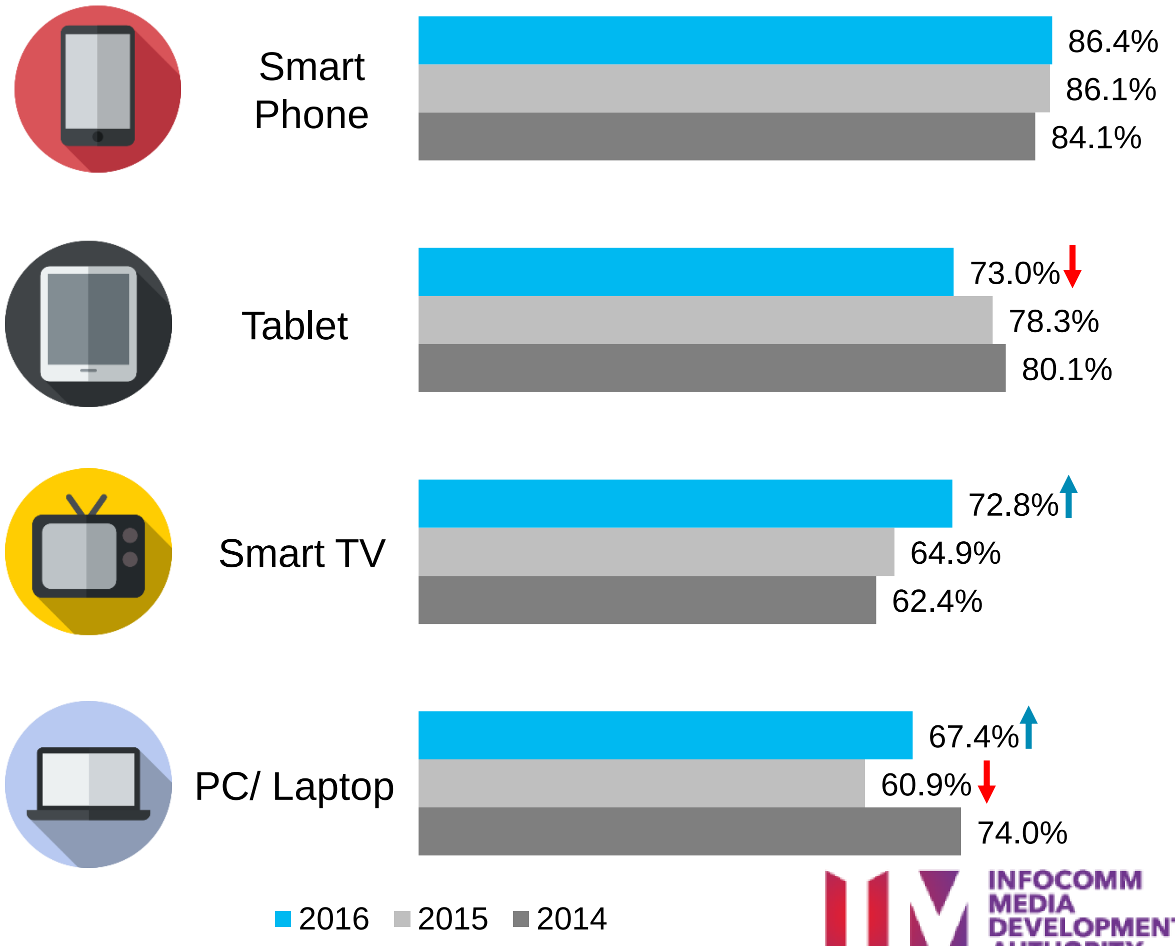


Chart 22: Most frequently used devices to access the Internet

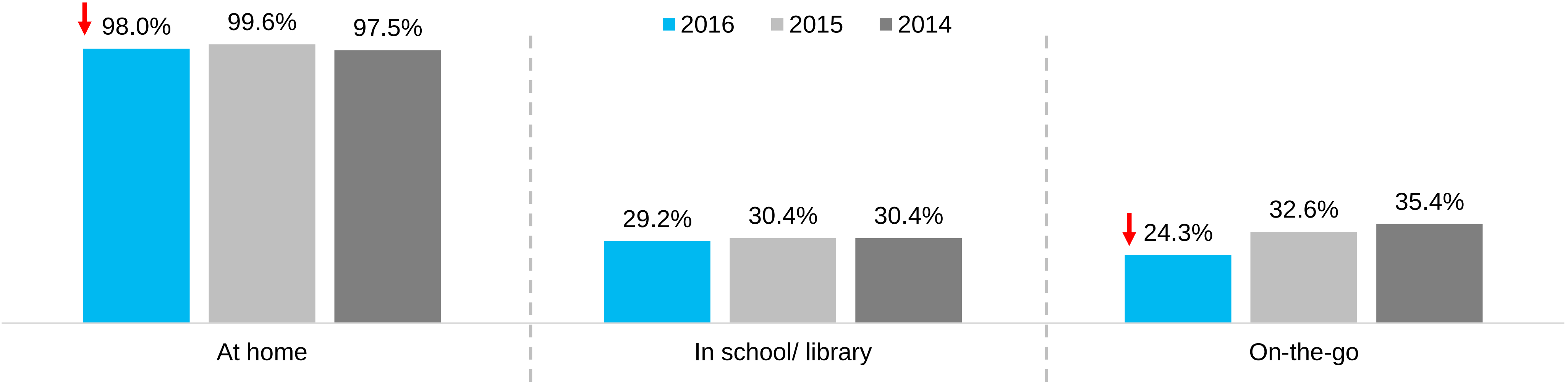


Note: Respondents were those who used the Internet for media and non-media activities.

Note: Devices were ranked based on 1 being the most used and 3 being the least used. Mean scores were calculated based on the rankings where mean score of 100% is maximum and 33.3% is minimum.

ALMOST ALL THE CHILDREN HAD ACCESSED THE INTERNET WHILE AT HOME

Chart 23: Location accessed the Internet



	At home	In school/ library	On-the-go
Accessed Internet at location daily	**56.3%**	**13.6%**	**45.3%**
Most used device	 **Smart Phone (49.8%)**	 **PC/ Laptop (65.7%)**	 **Smart Phone (91.2%)**

Note: Respondents were those who used the Internet at the respective locations.

SIMILAR TO INTERNET ACCESS, CHILDREN'S SOCIAL MEDIA TAKE-UP CONTINUED TO INCREASE

- Children are also starting to access social media platforms at a younger age.
- Almost all the children were using YouTube, while Facebook usage continued to fall (Chart 25).

Chart 24: Ever used social media platforms

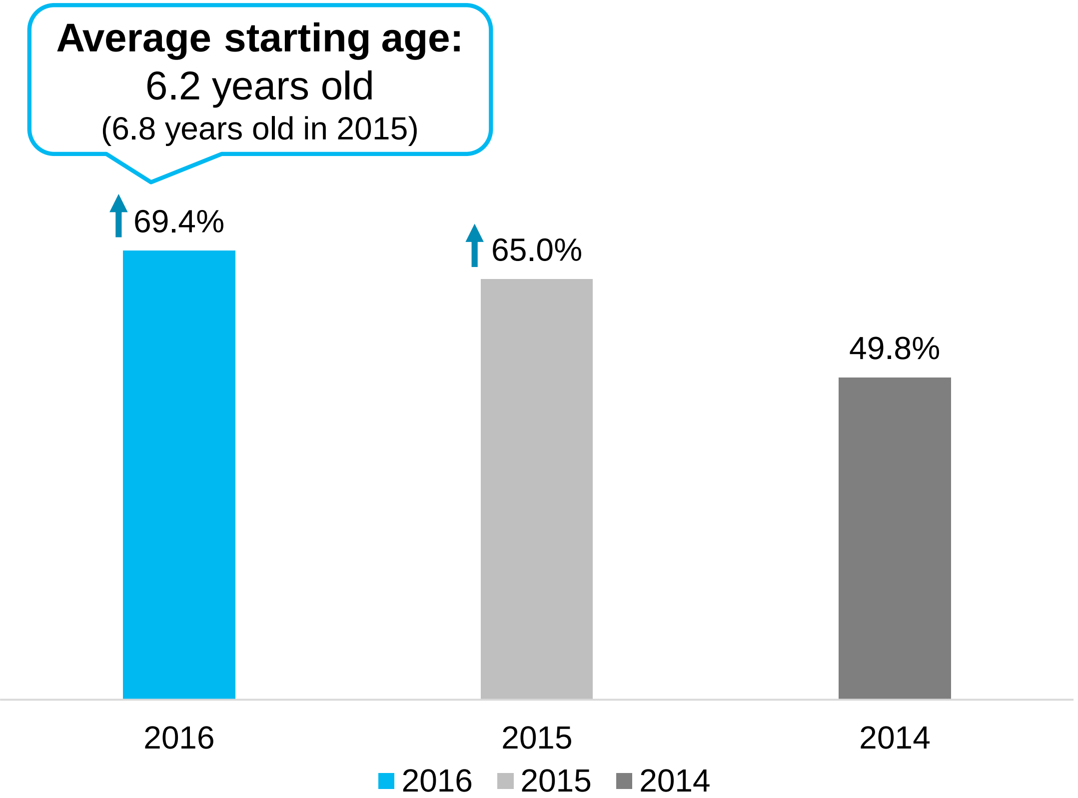
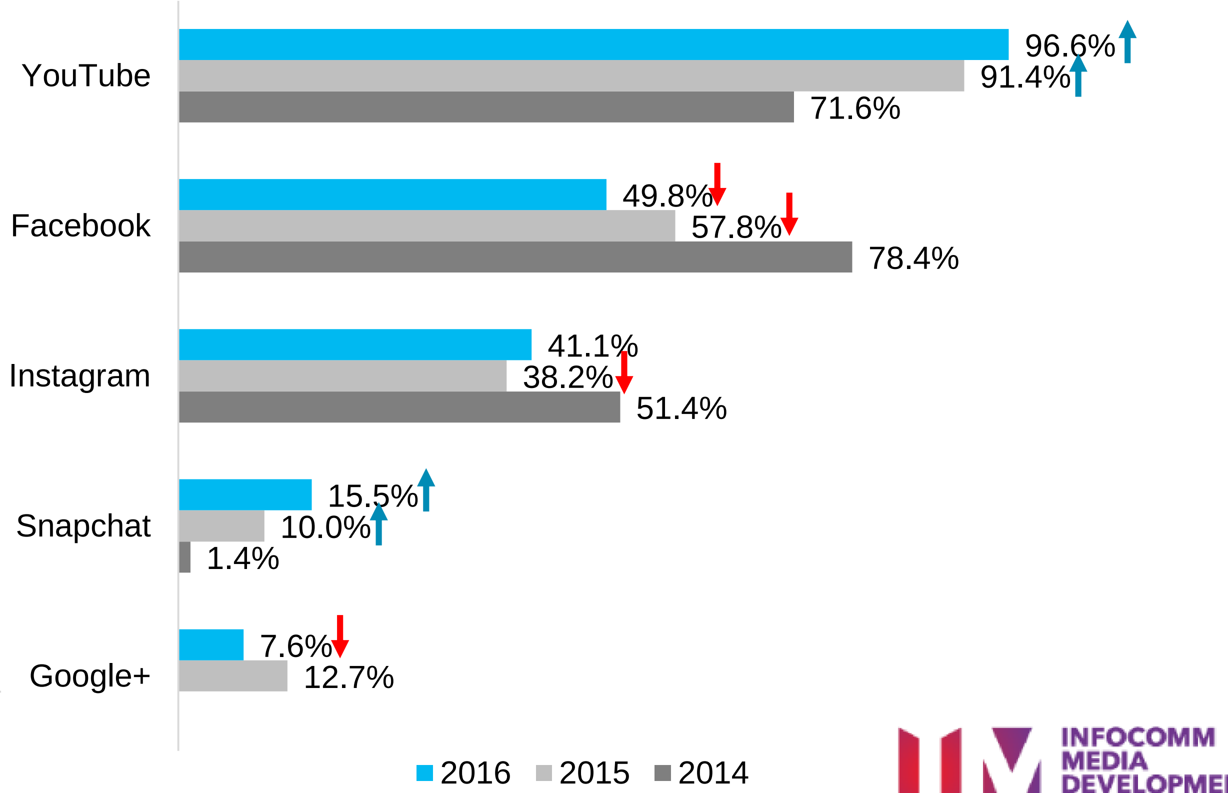


Chart 25: Social media platforms currently using



Note: Children's starting age indicates the age that they first started using any social media platform, instead of the average of the starting ages, which was indicated in last year's report.

YOUTUBE WAS ALSO THE FAVOURITE SOCIAL MEDIA PLATFORM OF CHILDREN FROM ALL AGE GROUPS

- That said, social media preference diversified as the children grew older – older children aged 7 to 14 also liked Instagram (Charts 28 and 29).

Chart 26: Favourite social media platform

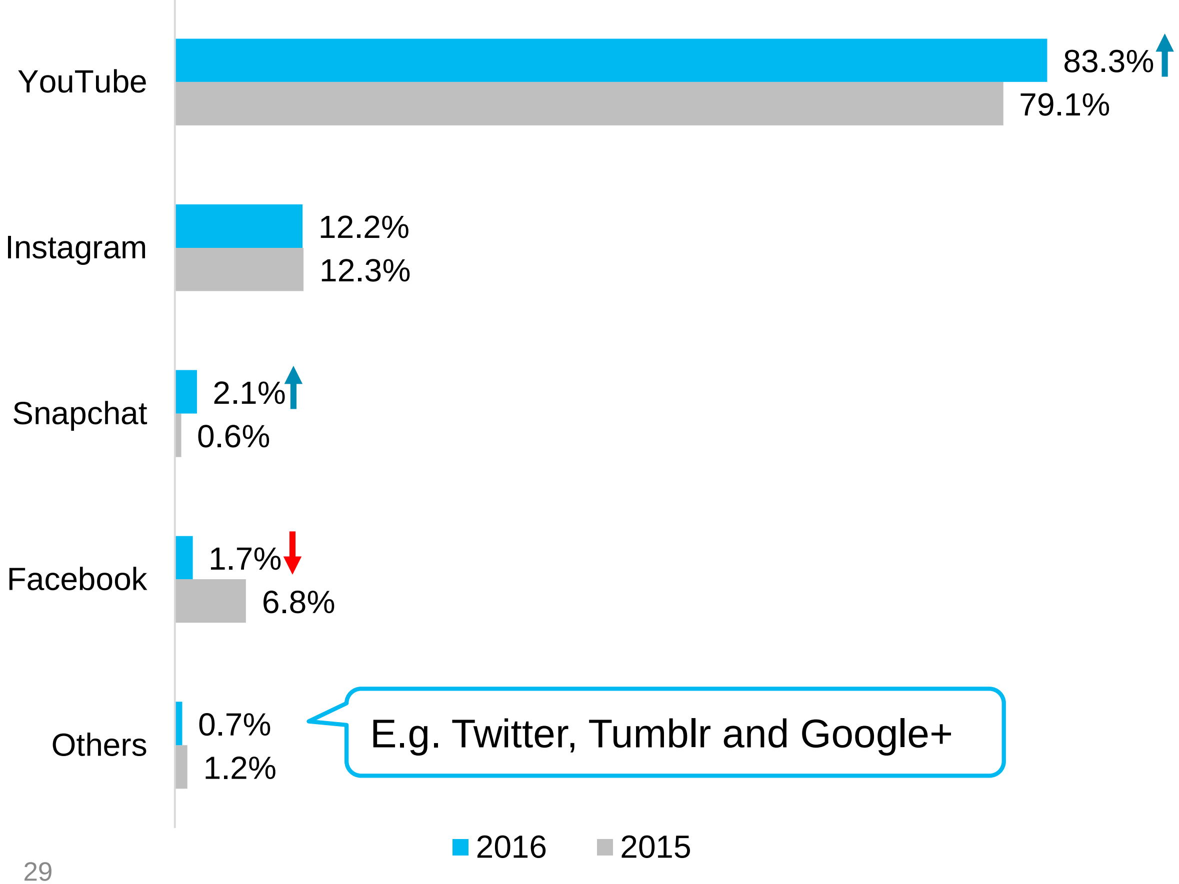


Chart 27: Favourite social media platform – 0 to 6

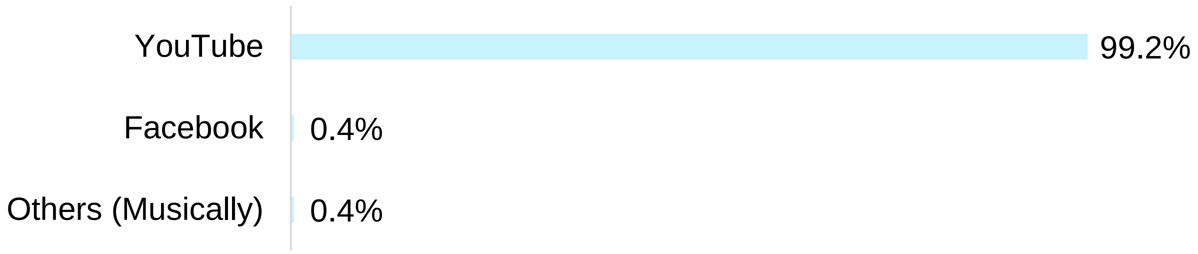


Chart 28: Favourite social media platform – 7 to 10

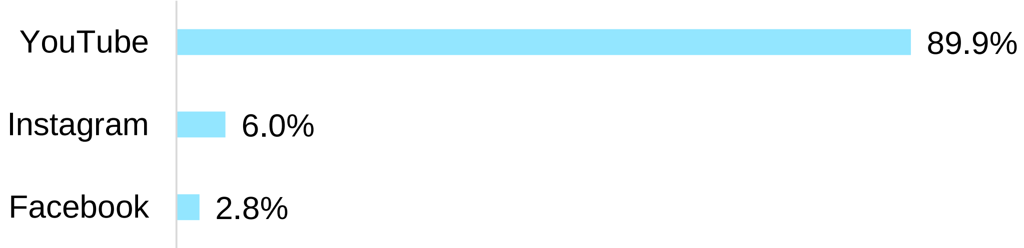
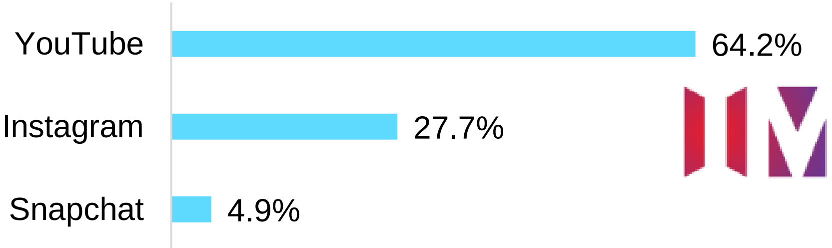


Chart 29: Favourite social media platform – 11 to 14



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Note: Respondents were those who used social media platforms.

THANK YOU

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