

MDA Media Consumer Experience Study (2013)



Research Objectives

- The Media Consumer Experience Study 2013 was commissioned by the Media Development Authority (MDA) with the aim of studying consumer feedback on various aspects of the media content and services across broadcast, print and online platforms.
- The research aims can be summarised as follows:
 - Measure the general level of satisfaction with the media;
 - Analyse patterns of behaviour and consumption across various media platforms; and
 - Provide insights into Singaporean consumers' experiences



Research Methodologies



A nationwide sampling frame that was **representative of the Singapore population** aged 15 years old and above

1,742 respondents
(Singapore Citizens and Permanent Residents) were interviewed.



Each face-to-face interview lasted around

45 minutes on average.

The fieldwork was conducted during the period of **March to May 2013.**



Research Methodologies – Scoring Method

OVERALL MEDIA SATISFACTION INDEX

- Each response label is associated with an Index Score, e.g. Satisfied is given a score of 83.3%
- Index scores above 66.7% indicate that respondents are at least Slightly Satisfied with the media content and services
- Index Scores are averaged across all respondents
- Overall scores are also weighted by time spent on the medium, where applicable

Satisfaction Index Scale							
Response Labels	Very Dissatisfied	Dissatisfied	Slightly Dissatisfied	Neutral	Slightly Satisfied	Satisfied	Very Satisfied
Scale	1	2	3	4	5	6	7
Index Scores	0%	16.7%	33.3%	50.0%	66.7%	83.3%	100%



Note for Analysis: Changes in labeling of response options

- To ensure parity with satisfaction scales used in other surveys (e.g. REACH Public Perception Survey), there was a **change** in the naming of the scale from:

2011

Extremely Satisfied	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dissatisfied	Very Dissatisfied	Extremely Dissatisfied
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2013

Very Satisfied	Satisfied	Slightly Satisfied	Neutral	Slightly Dissatisfied	Dissatisfied	Very Dissatisfied
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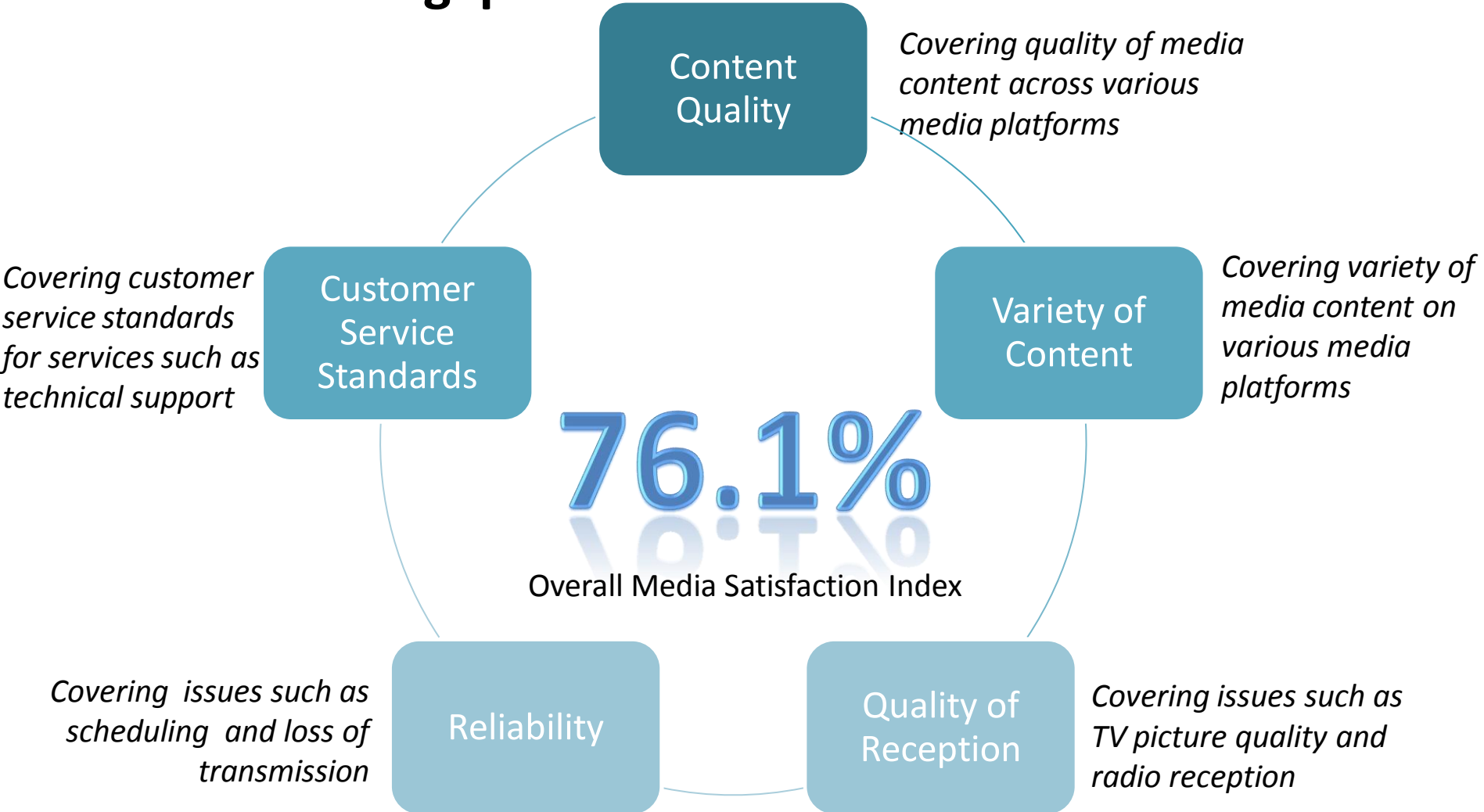
Changes in labeling affect comparability vis-à-vis respective figures in 2011. Any comparisons between 2011 and 2013 satisfaction scores should be made with care.



OVERALL MEDIA SATISFACTION INDEX

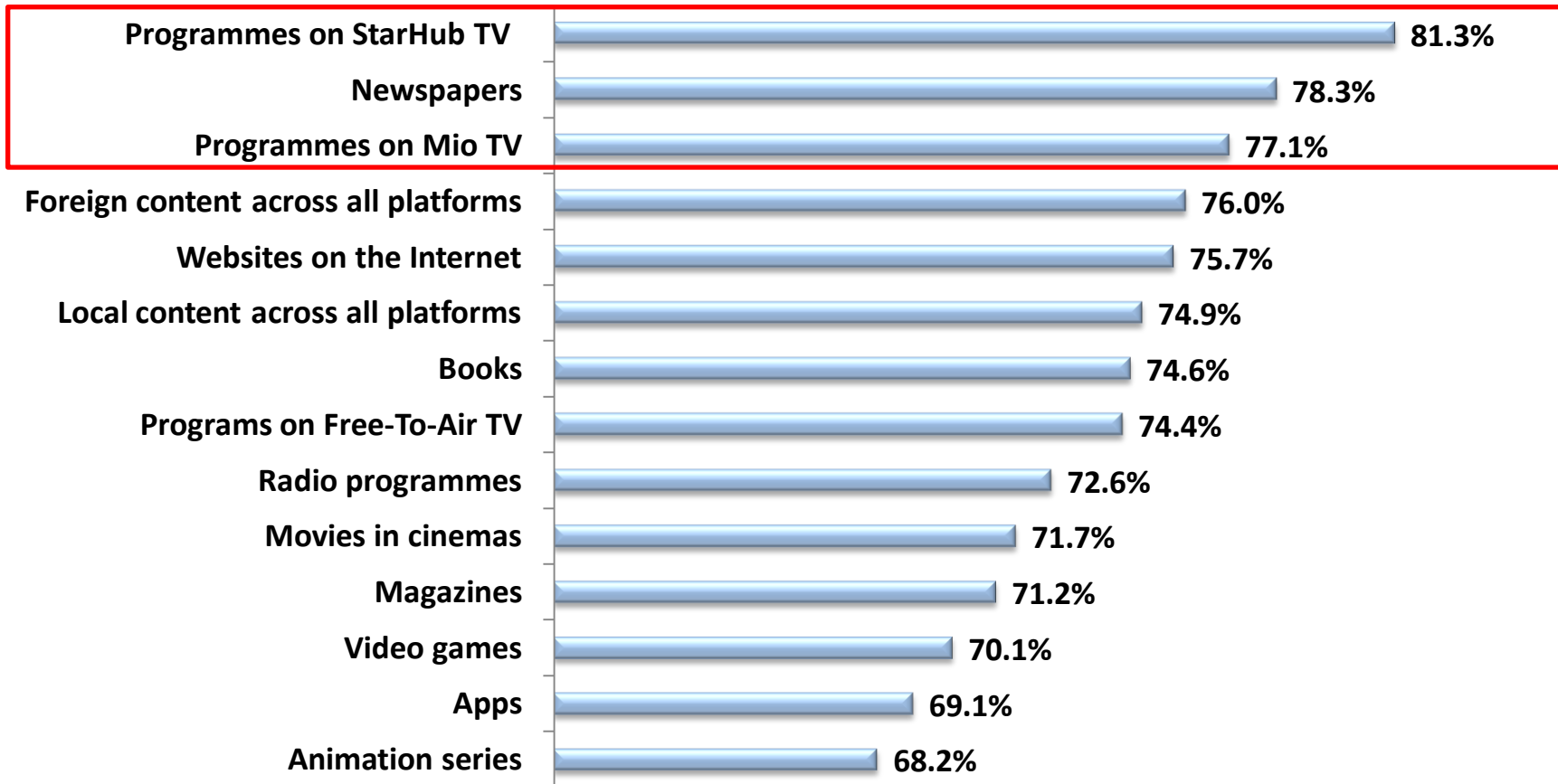


In general, consumers are satisfied with the media services in Singapore



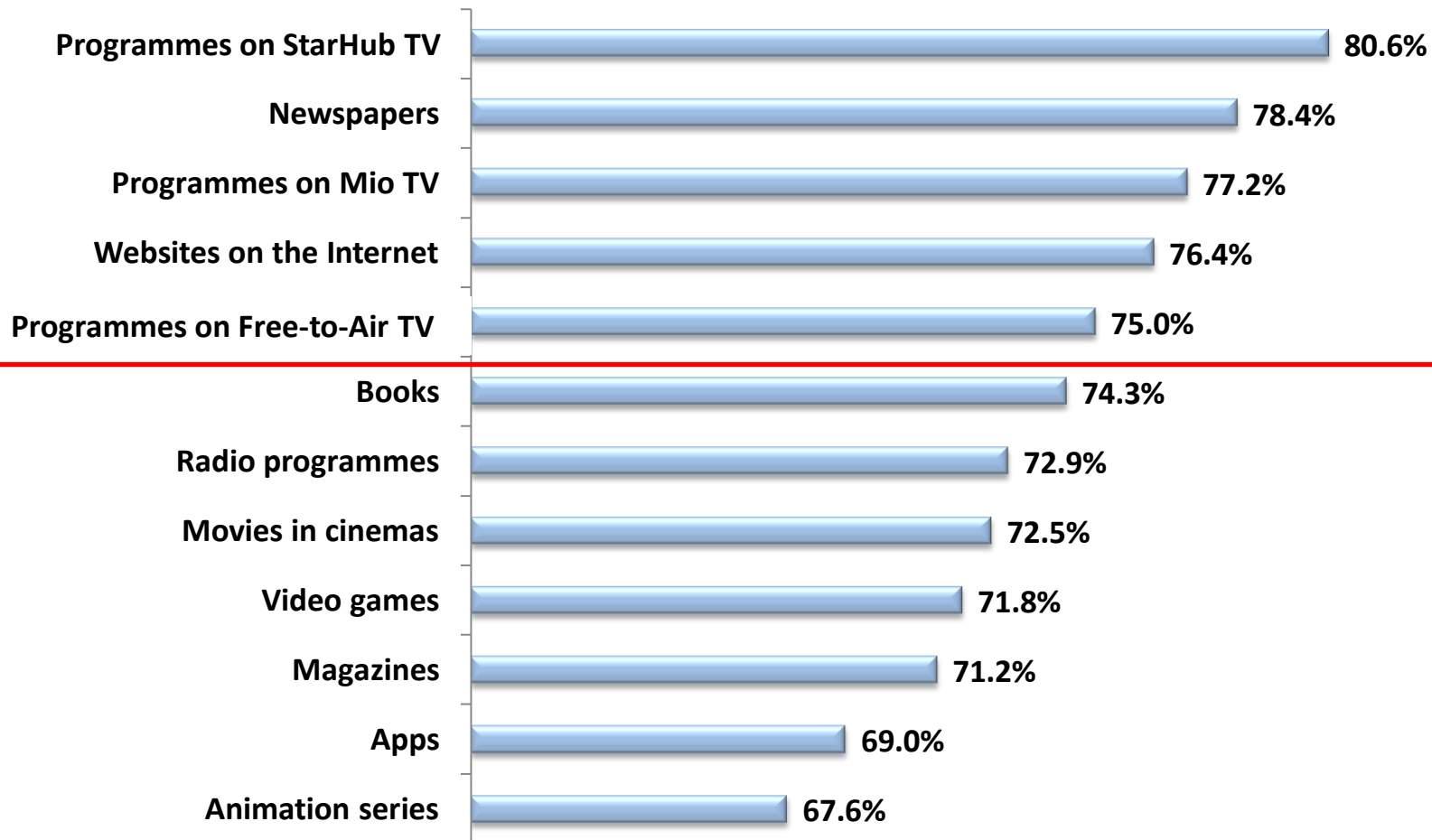
Quality of Media Content: Programmes on StarHub TV TV scored the highest for quality of media content

Mean 2013 (SC & PR)



Variety of Media Content: StarHub TV scored highest followed by Newspapers, Mio TV, Internet and MediaCorp

Mean 2013 (SC & PR)

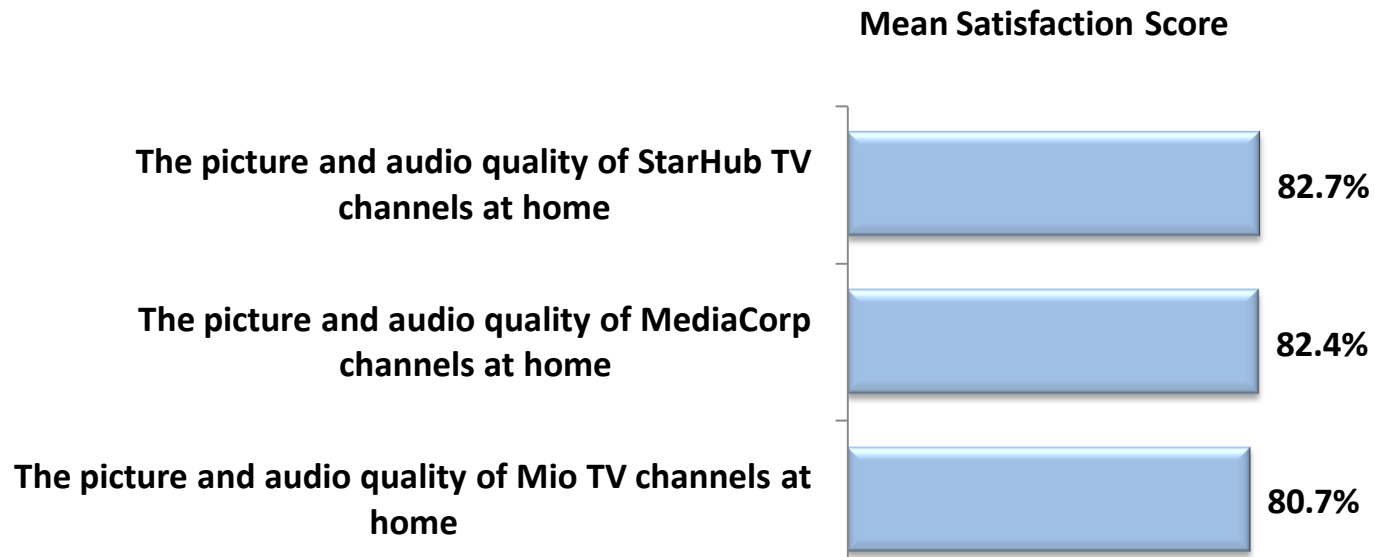


*Scorings reflect both local and foreign content on the platforms



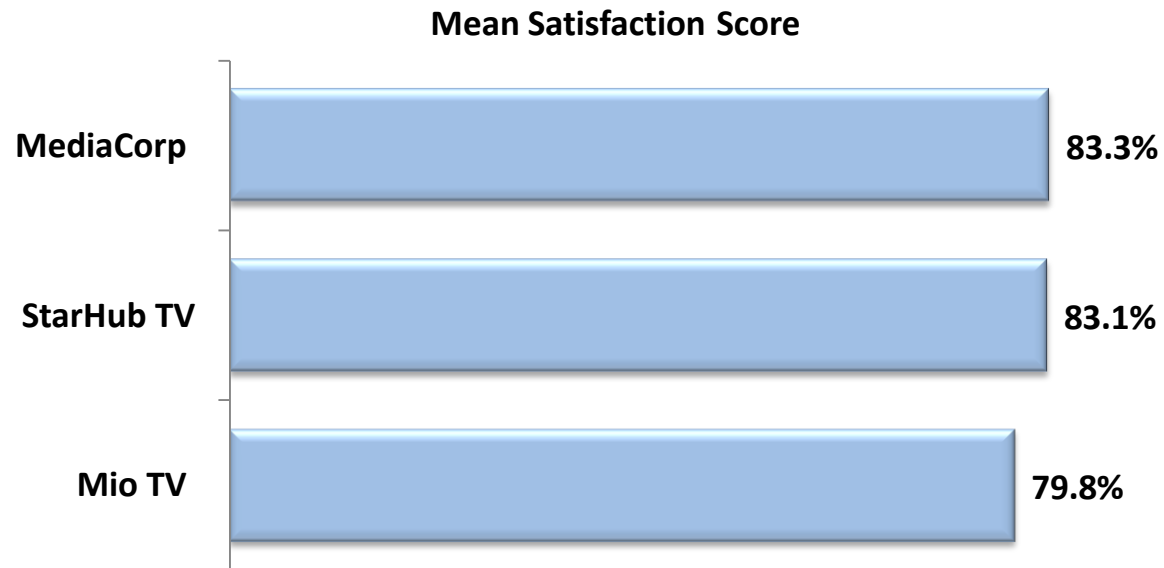
Quality of Receiving Media Services: Audiences are generally satisfied across all mediums

The following items refer to the quality of receiving media services in Singapore



Reliability of Media Services: MediaCorp received the highest satisfaction scores

The following options refer to the reliability of media services in Singapore (e.g., were programmes shown as per scheduled, were there losses of transmission halfway through programmes etc).



Customer Service Standards: Three broadcasters scored above 75%

The following items refer to the customer service standards (e.g., hotline services, counter services and technical support) of media organisations in Singapore.



In general, consumers are satisfied with the content classification system in Singapore

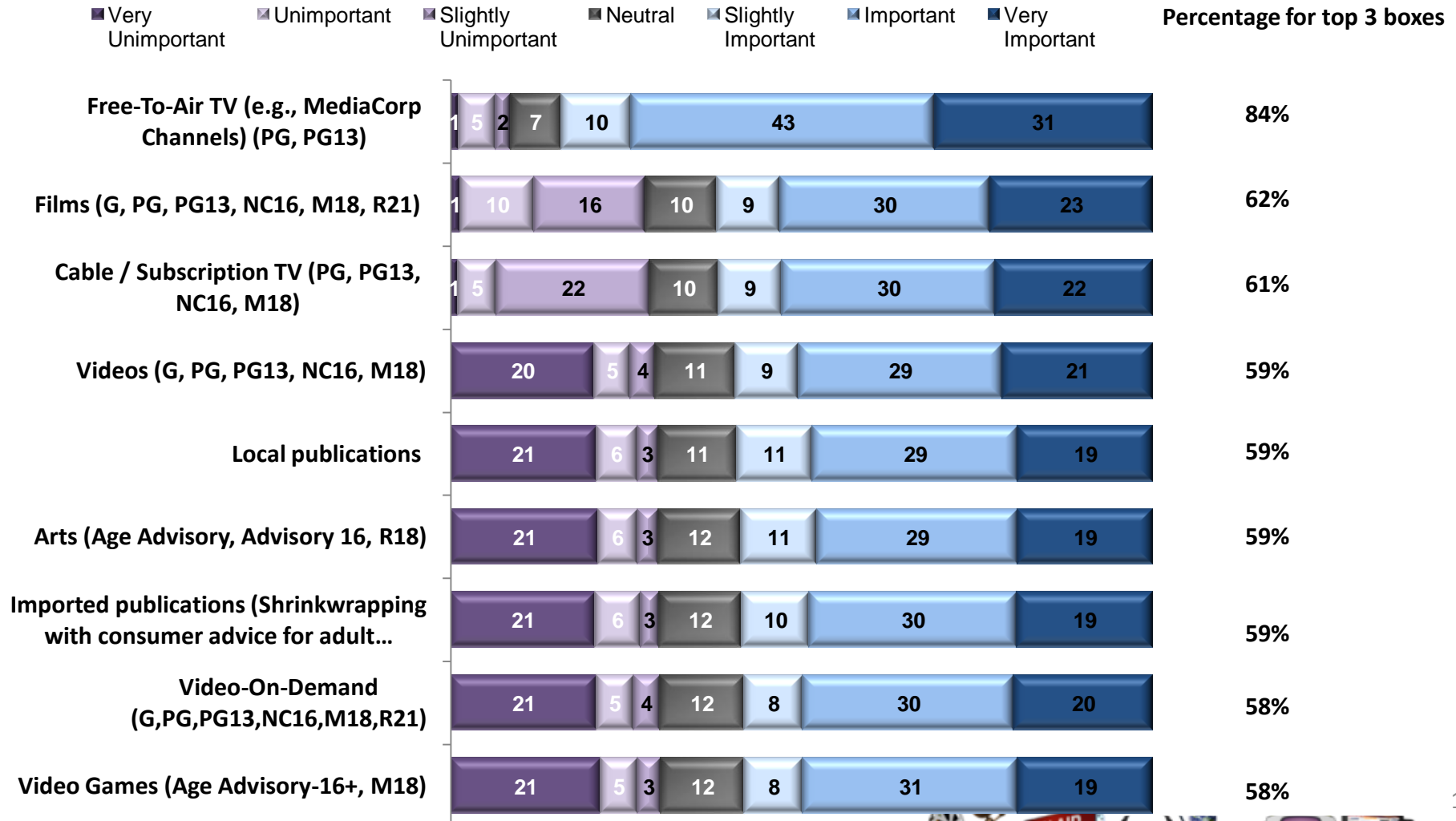
Overall Satisfaction Index with Content Classification System

80.7%



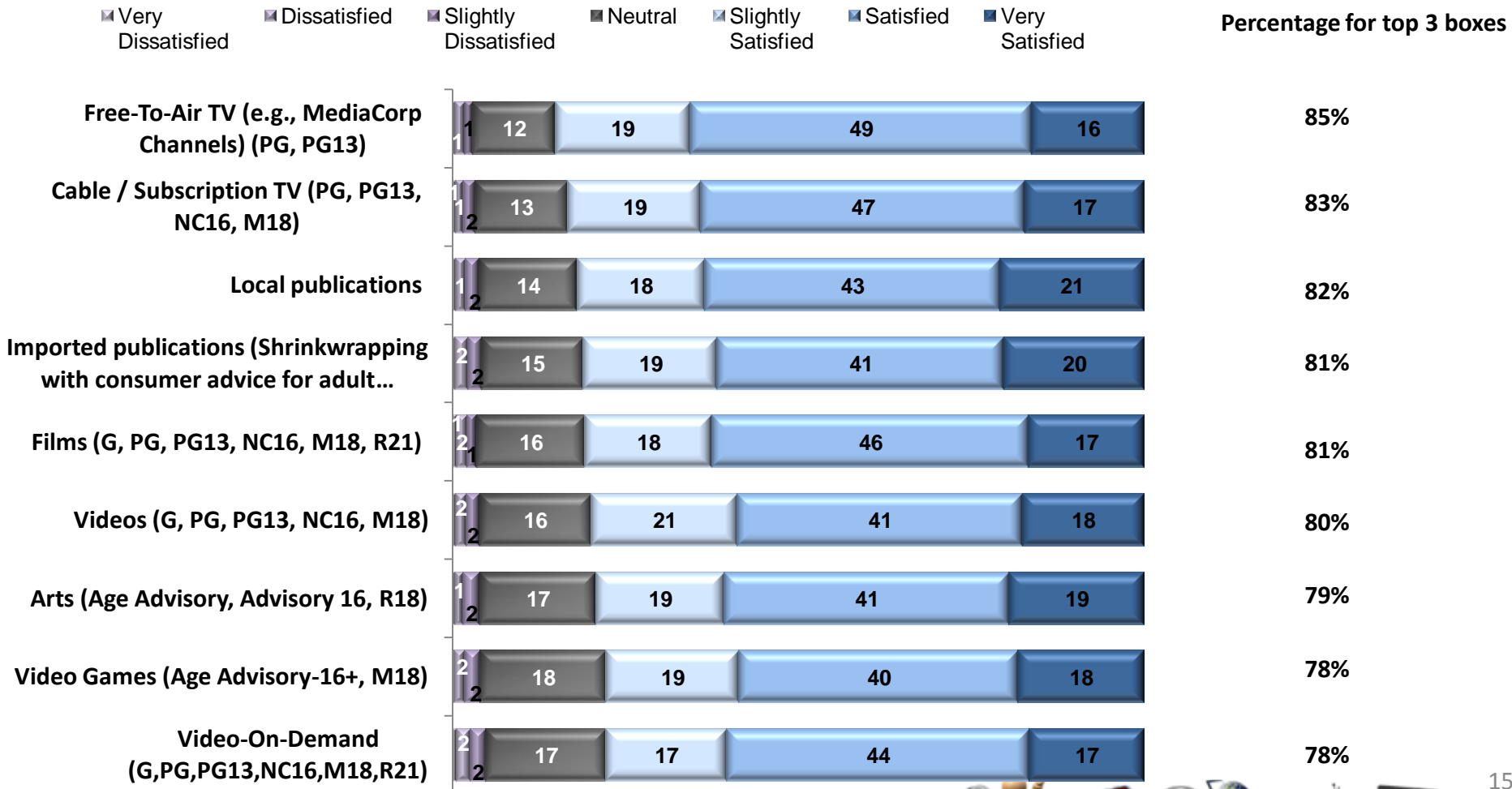
More users felt that classification systems are more important for FTA TV

Importance of following content classification systems



Satisfaction with content classification systems was highest for FTA TV

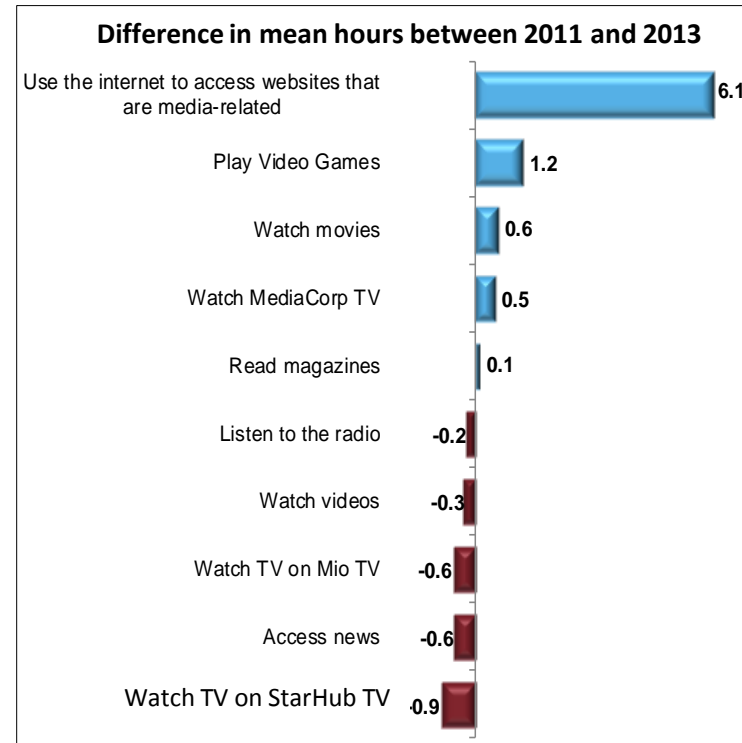
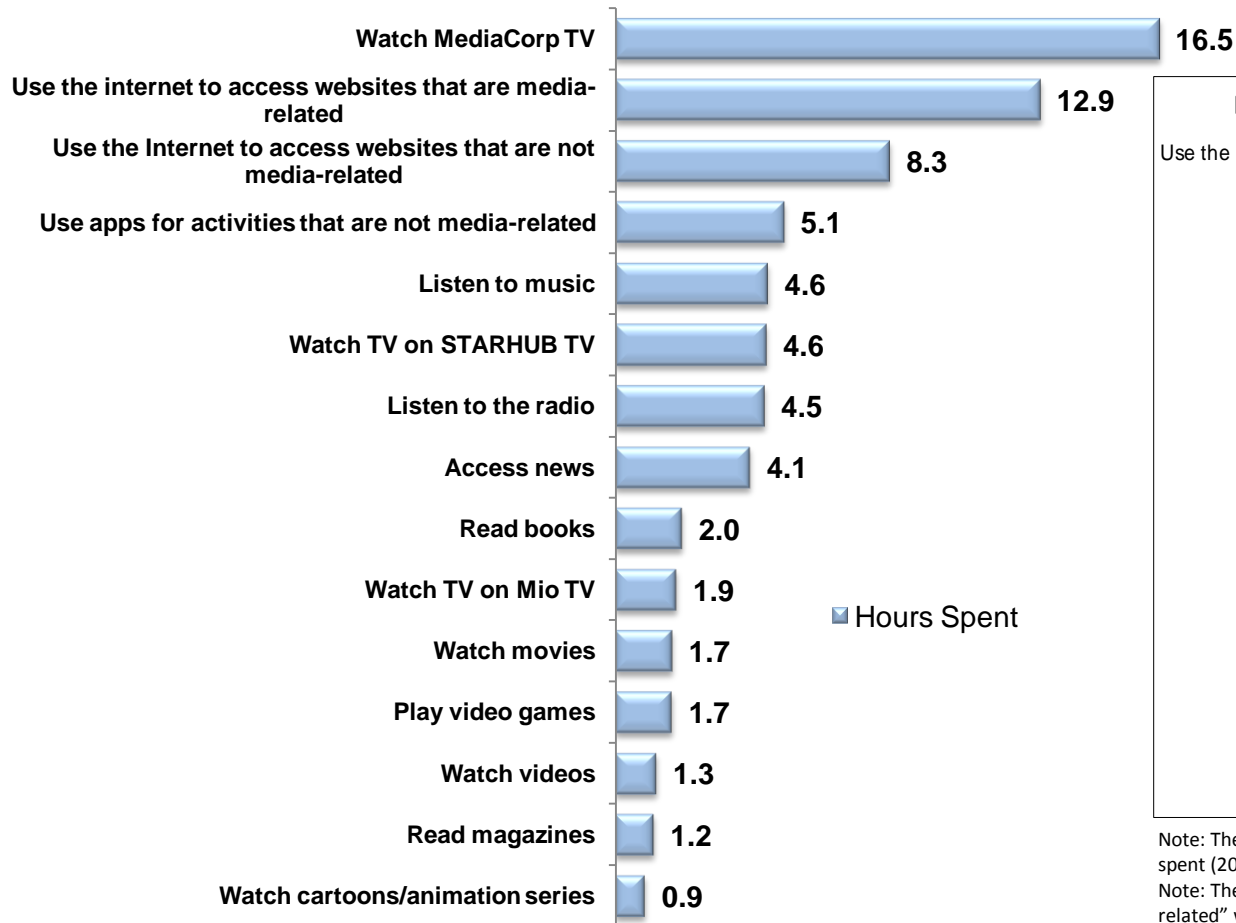
Level of satisfaction for the following content classification systems



MEDIA CONSUMPTION HABITS



Local consumers are spending significant amount of time watching MediaCorp TV and accessing the Internet for media related content



Note: The difference in mean hours over time was derived from taking Mean time spent (2013) minus mean time spent (2011).

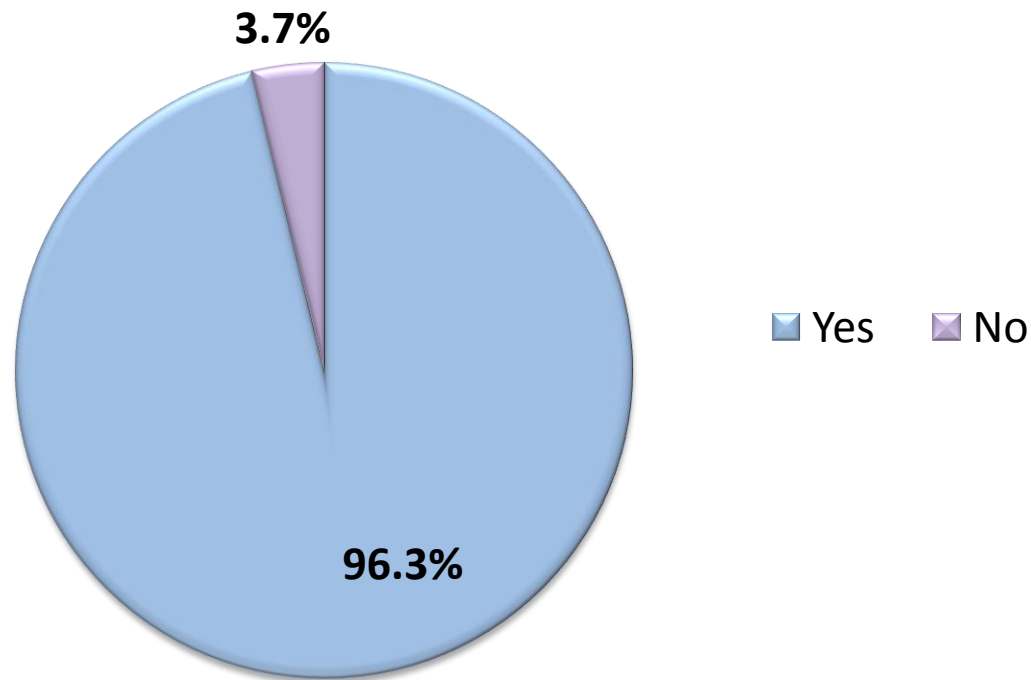
Note: The mean time spent (2013) on "internet to access websites that are media-related" were those who do not use traditional platform.

Qn - In a typical week, how many hours do you spend on each of the following activities? If you don't use the media, you can give your answer as "zero".

*Time spent on StarHub TV and Mio TV may include time spent on both free-to-air TV and Pay TV channels



96% of local consumers used local media platforms for news and current affairs

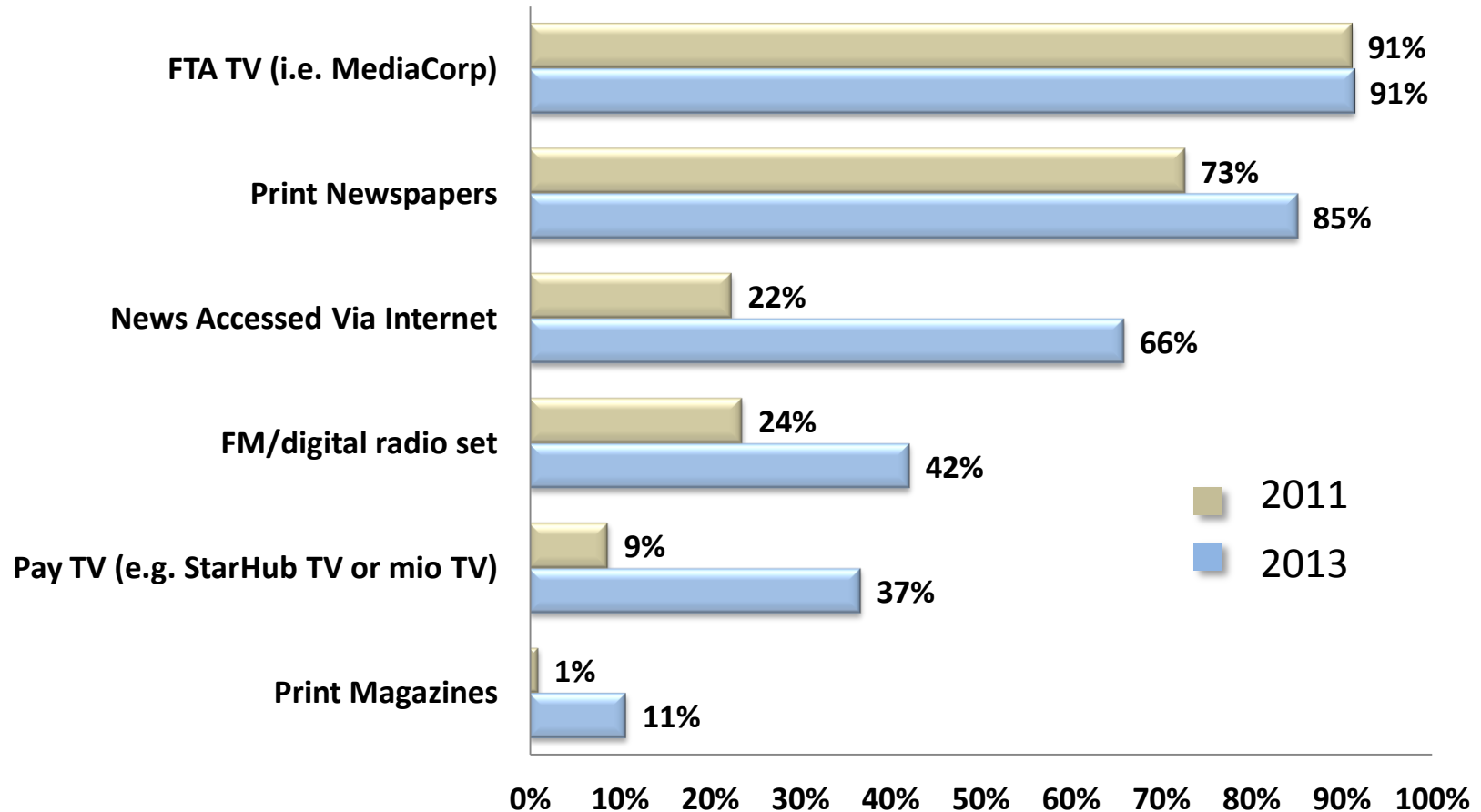


Qn - Do you use any local media platforms for news and current affairs (be it local or world news & current affairs)?



FTA TV is the top source for news, followed by print newspapers and the Internet

Sources of Singapore-related News

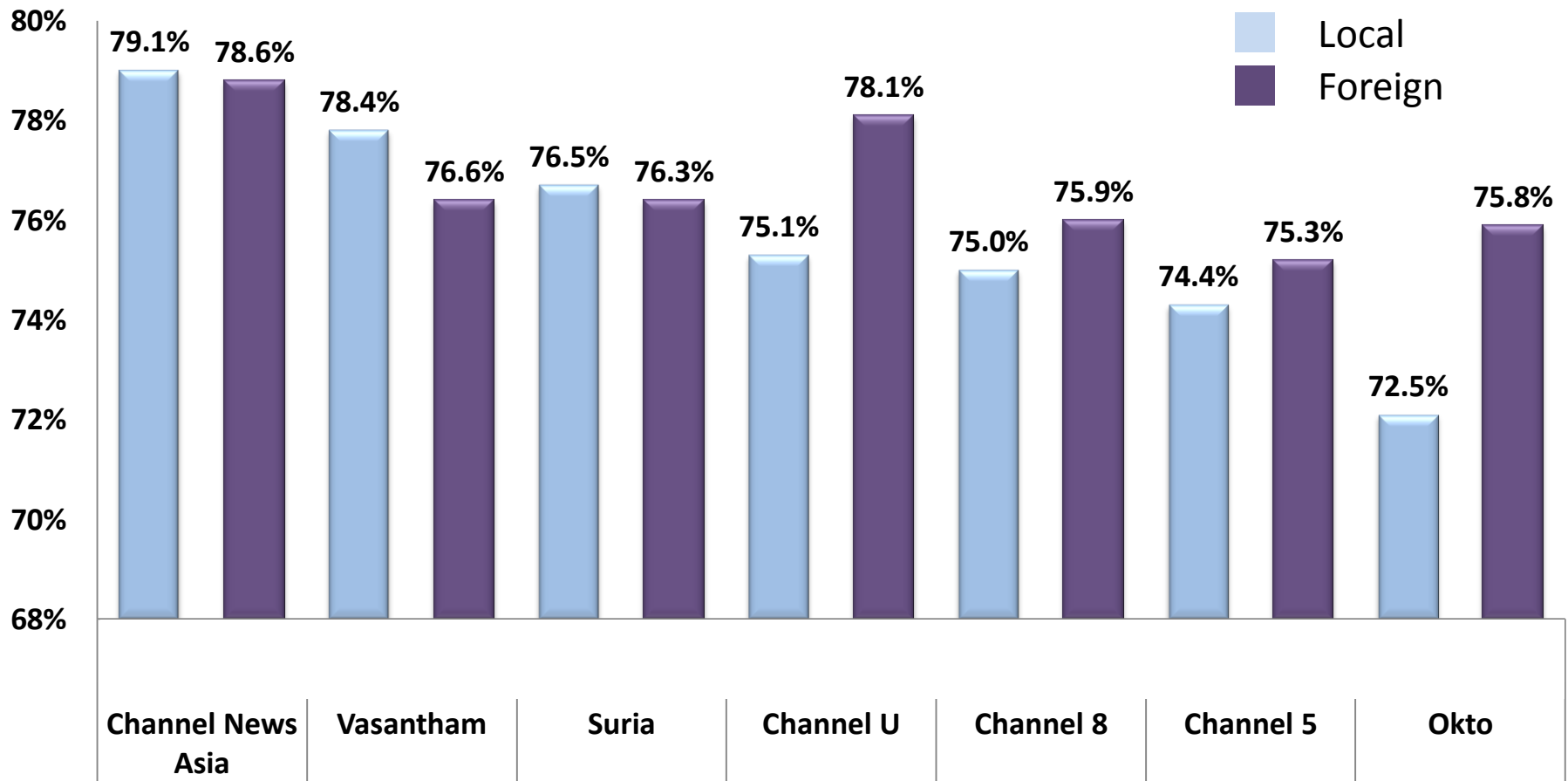


FREE-TO-AIR TV AND PAY TV SERVICES



Channel NewsAsia scored the highest in terms of satisfaction with local programmes

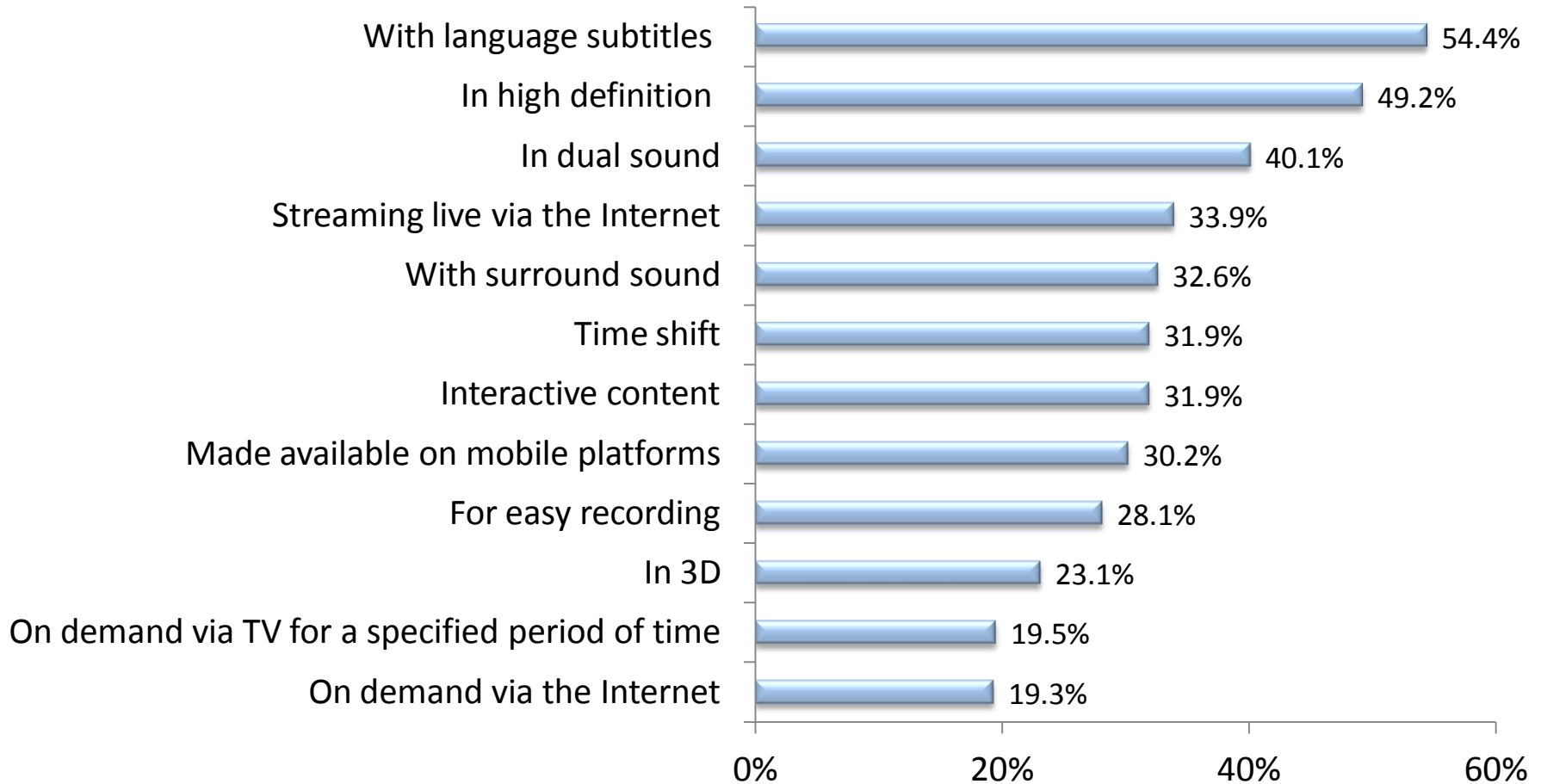
Level of satisfaction with content quality and variety of programmes for each channel



Qn – On a scale of 1 to 7, please tell me your level of satisfaction with the content quality and variety of local and foreign programmes for each channel



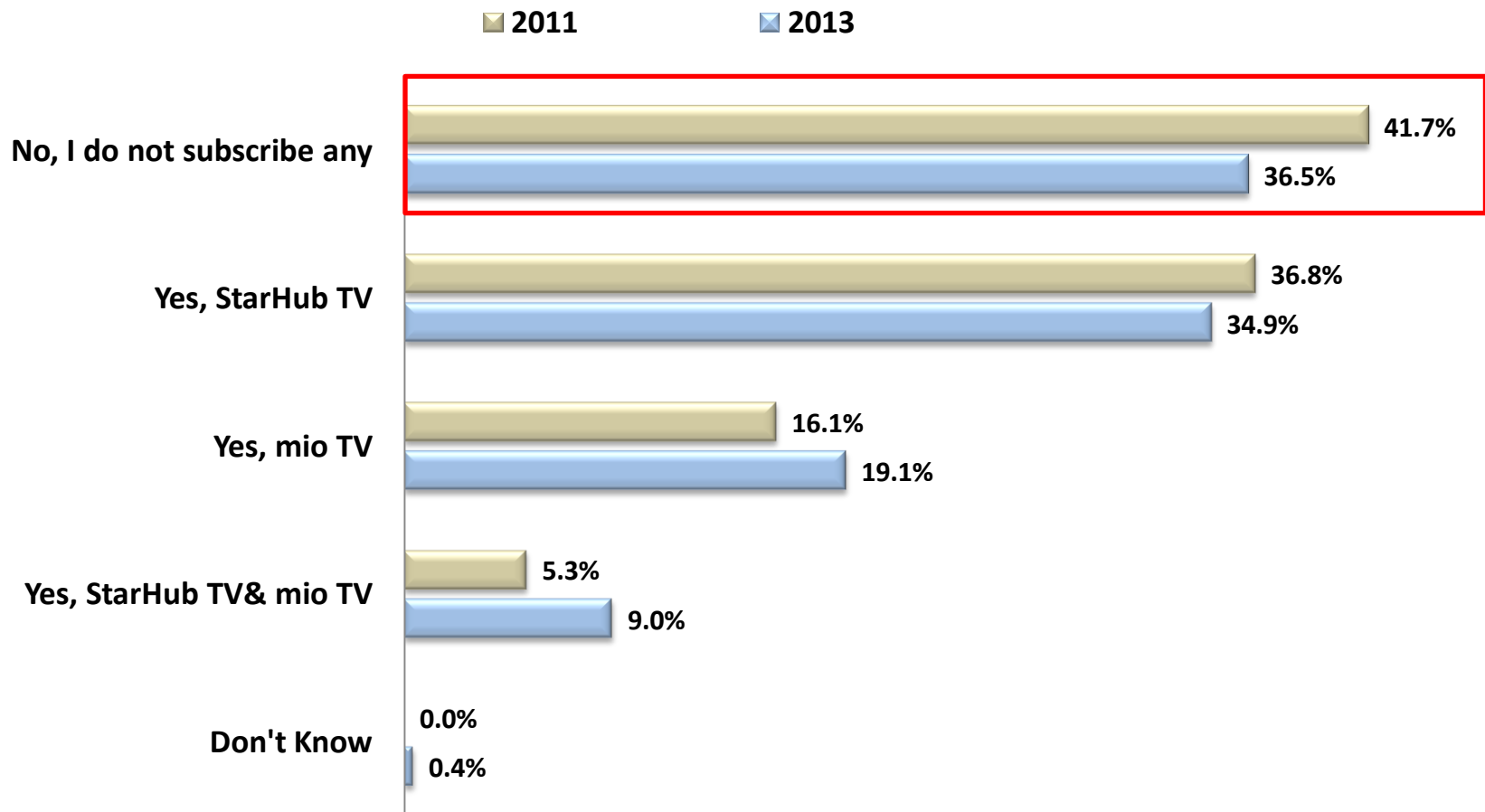
Providing language subtitles and HD content could prompt consumers to watch more local MediaCorp programmes



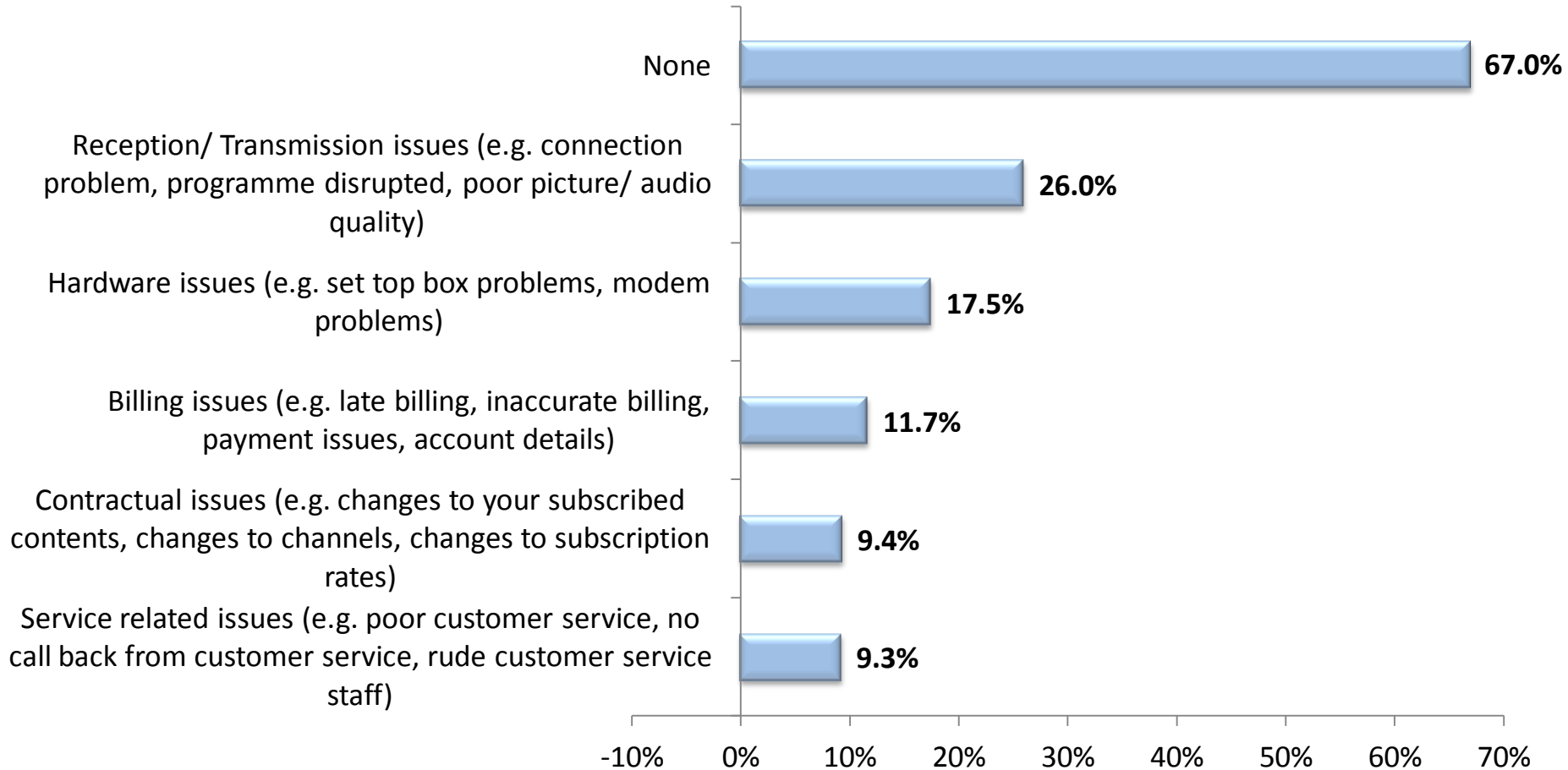
Qn- Would you watch more local Mediacorp programmes if they are available...



63% of households subscribed to pay TV, with 9% of households subscribing to both StarHub TV and Mio TV



Majority of users had no concerns with pay TV services; 26% of users were concerned with reception and transmission issues



Qn - What are your key concerns with your Pay TV service over the past 1 year?
Please tick those that are of concern to you.



Lack of time was the top reason cited for not subscribing to Pay TV

	2011	2013
I have no time to watch Pay TV (e.g. StarHub TV or Mio TV)	40.7%	53.6%
MediaCorp is enough	57.7%	47.6%
Pay TV (e.g. StarHub TV or Mio TV) is expensive	16.7%	23.2%
The content is available on the Internet	-	5.7%
I cannot get Pay TV (e.g. StarHub TV or Mio TV) where I live	0.2%	0.1%
Others	3.7%	0.0%
Base	600	643

Qn - Why does your household not subscribe to Pay TV (e.g. StarHub TV or Mio TV)?



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