

MDA Media Consumer Experience Study (2011)



Research Objectives

- To gauge general level of satisfaction for local media consumers
- Survey was commissioned by MDA, and conducted by the Singapore Internet Research Centre, Nanyang Technological University.
- Quantitative and qualitative analyses were conducted from Sep 2011 to Jan 2012.
- Some of the questions in this Study were benchmarked against and drew reference from similar international surveys.



Research Methodologies – Sampling

n = 1,030 face-to-face interviews were administered for the Main Survey

Survey sample is aligned to Census of Population 2010 profiles in terms of age, ethnicity, gender, dwelling type, etc.

Focus group discussions were conducted with selected local media consumers across different age profiles:

- 16 to 25 years
- 26 to 35 years
- 36 to 45 years, and
- 46 to 65 years



Research Methodologies – Scoring Method

OVERALL MEDIA SATISFACTION INDEX

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

Satisfaction Index							
Response Labels	Extremely Dissatisfied	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Extremely Satisfied
Scale	7	6	5	4	3	2	1
Index Score	0%	16.7%	33.0%	50.0%	66.7%	83.3%	100%



Section 1: Overall consumer satisfaction



Consumers are satisfied with media services in Singapore: Overall media satisfaction index is 72%

	Overall Media Satisfaction Index	Compared with UK Customer Service study* (Consumer Satisfaction Scores)
Overall Satisfaction with Media Services	72%	Pay TV: 68% Mobile: 69% Broadband: 58%

*The UK Office of Communications – GfK study

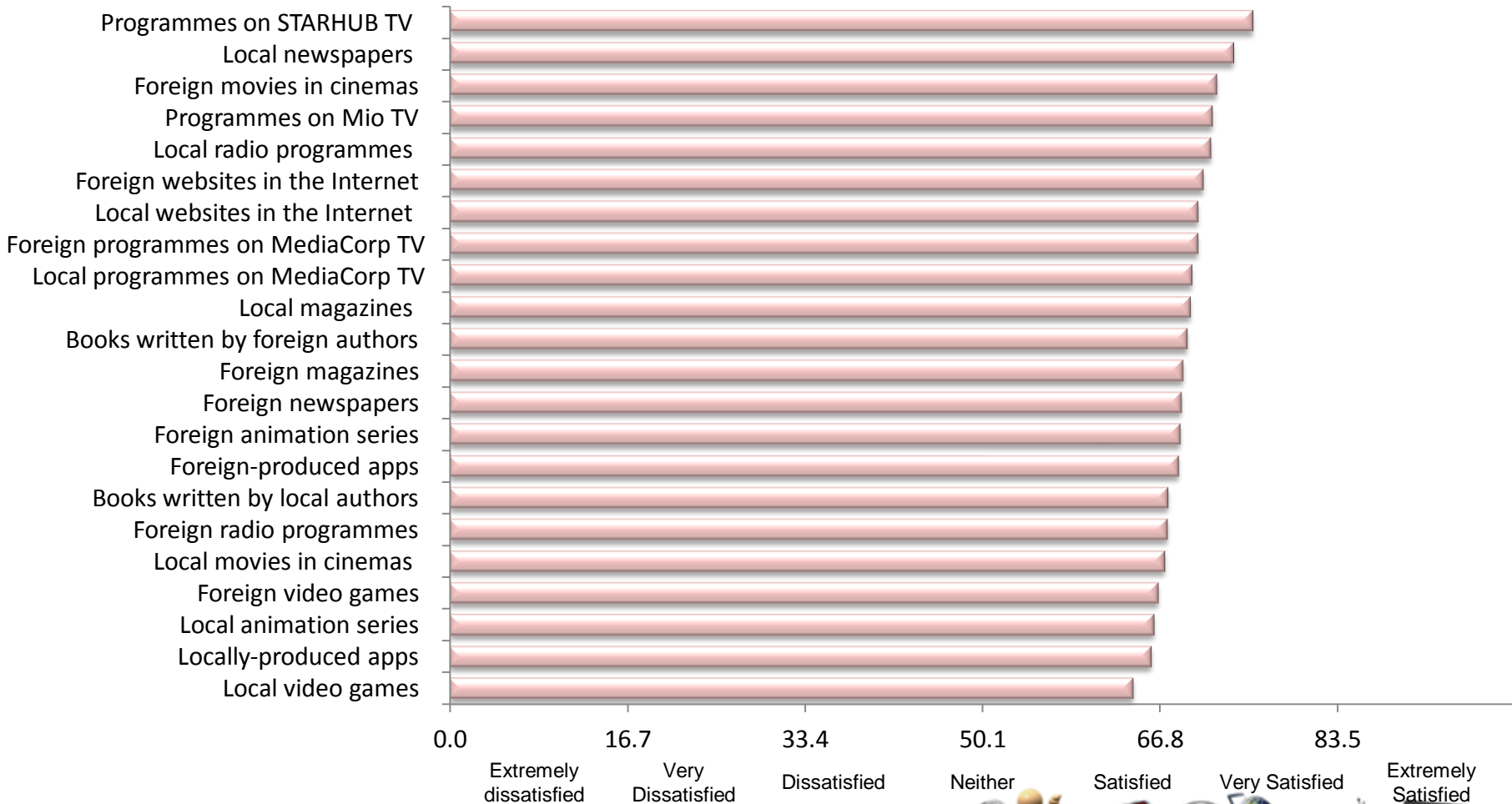
- **Overall Media Satisfaction Index of 72% is between Satisfied and Very Satisfied, based on the Index scale**
- **Overall Media Satisfaction Index includes:**
 - Content quality of local vs foreign content
 - Variety of local vs foreign content
 - Quality of reception
 - Reliability
 - Customer service standards



Consumers are generally satisfied with the quality of media content in Singapore

- Cable TV has the highest satisfaction index score

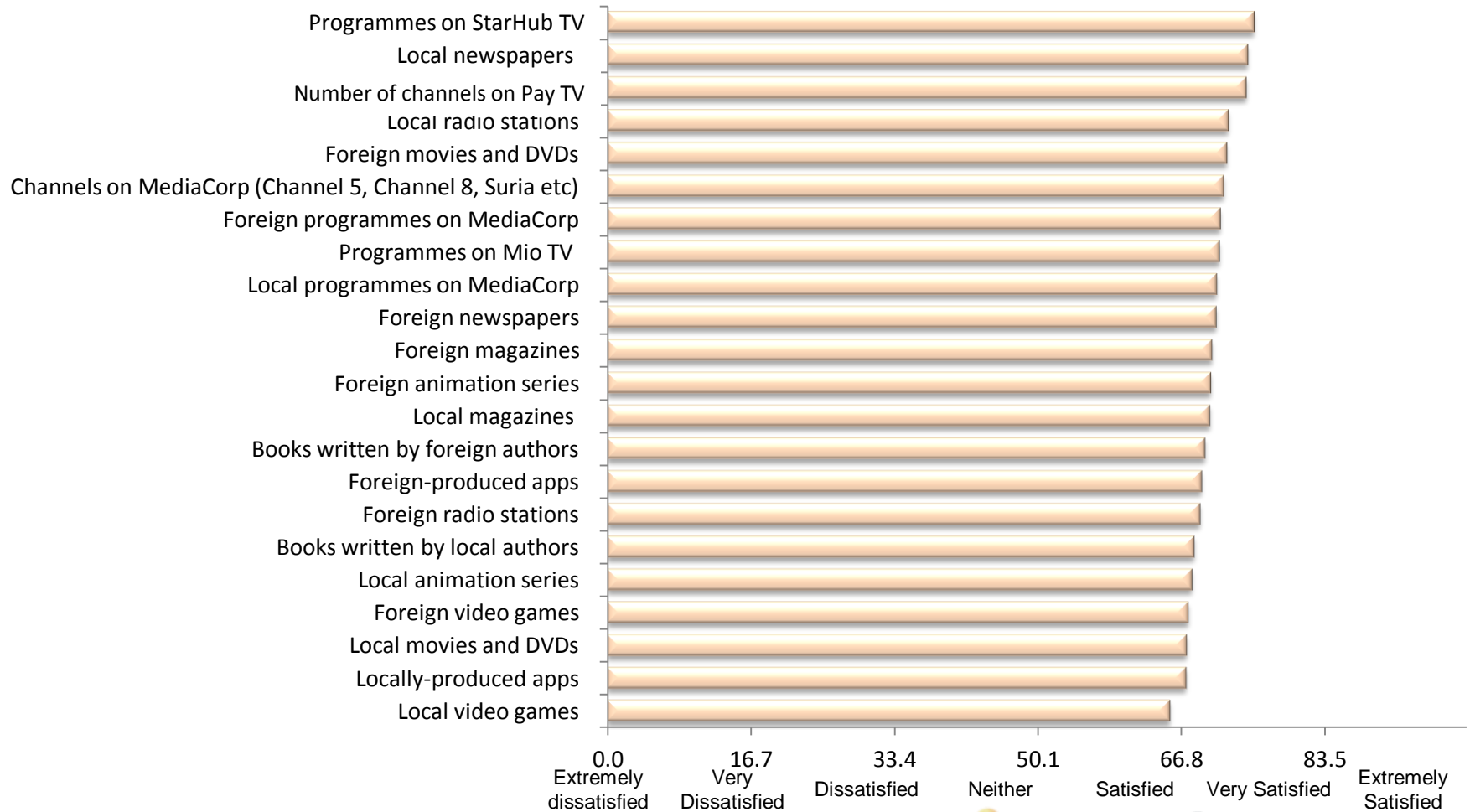
Overall Satisfaction with Quality of Media Content



Consumers are generally satisfied with the variety of media content in Singapore

- Cable TV has the highest satisfaction index score

Overall Satisfaction with Variety of Media Content



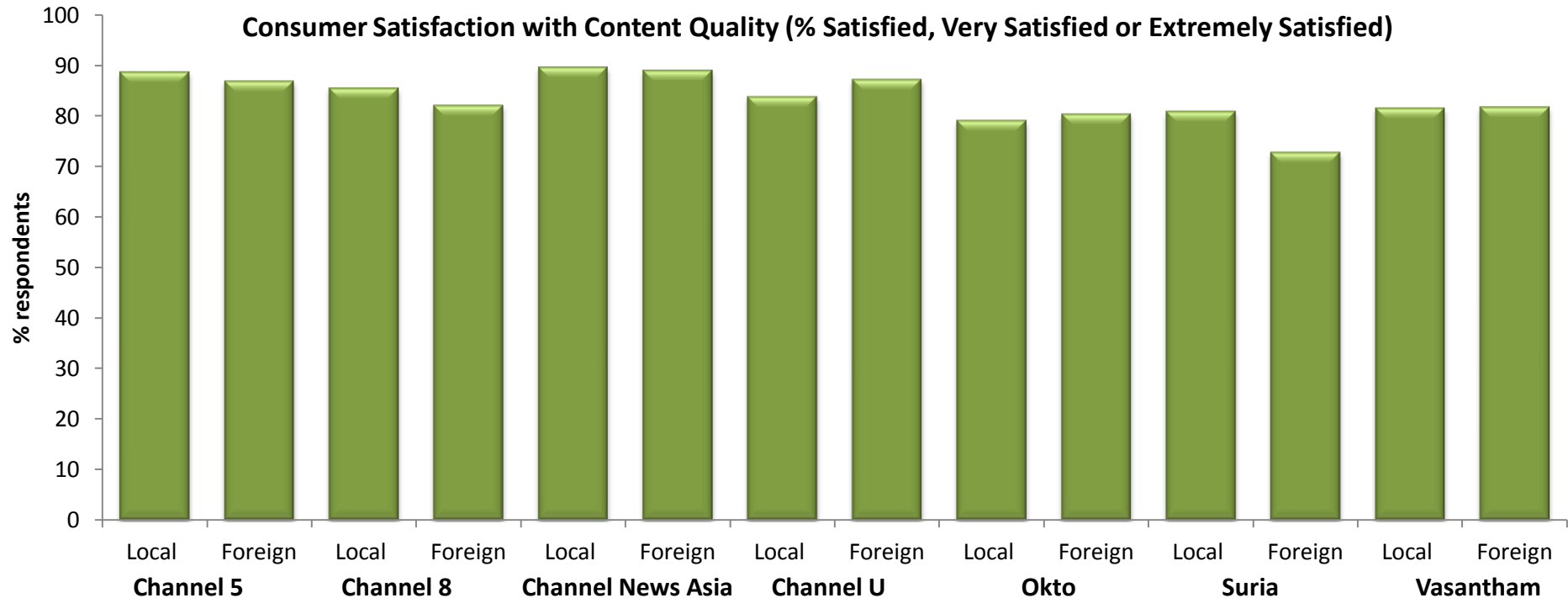
Section 2: Broadcast Media



Viewers are generally satisfied with the content and programmes on MediaCorp channels

Overall Satisfaction Index	
MediaCorp Channels - Content and Programmes	69%

- High proportions of respondents (mostly above 80%) are also at least satisfied with local and foreign programmes on MediaCorp channels



A fair proportion of respondents felt Channel 8 was the most-improved MediaCorp channel over the past year

- 45% of respondents felt that no particular channel had improved over the past year, while 15% of respondents felt that Channel 8 was the most-improved channel over the past year

Which one of Mediacorp's channels has improved the most over the last year?

Channel 5	Channel 8	Channel U	Vasantham	Suria	Channel News Asia	Okto	None	% of respondents
10%	15%	10%	3%	3%	11%	2%	45%	100%

- 86% of respondents felt that no particular channel had worsened over the past year

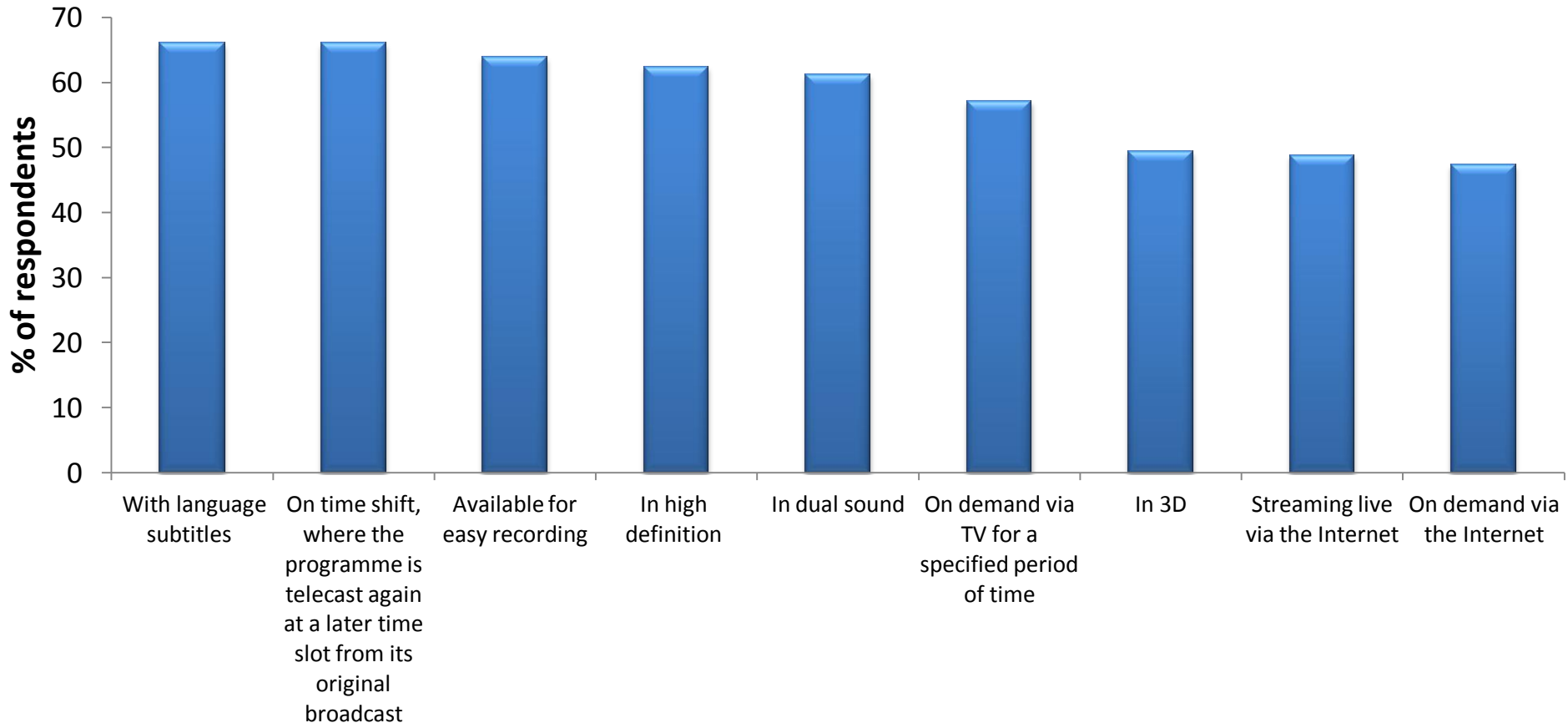
Which one of Mediacorp's channels has worsened the most over the last year?

Channel 5	Channel 8	Channel U	Vasantham	Suria	Channel News Asia	Okto	None	% of respondents
2%	5%	2%	1%	1%	2%	1%	86%	100%



Two-thirds of respondents would watch more MediaCorp programmes if they had language subtitles or telecast again at a later timing

Would watch more MediaCorp TV if it was...



Content variety and newer content are the top two reasons consumers subscribe to Pay TV

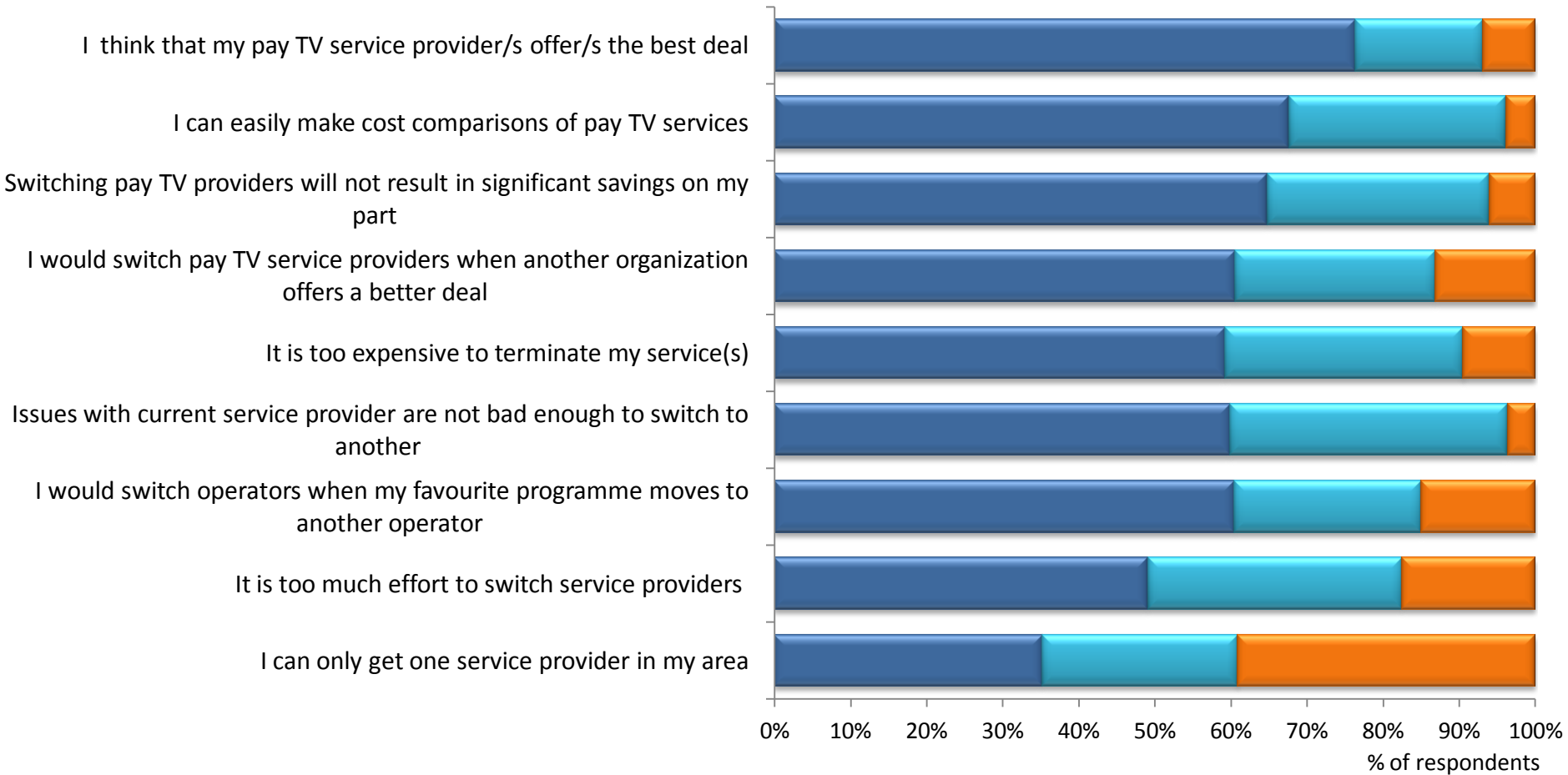
- “MediaCorp is enough” and “Have no time for Pay TV” were the top two reasons for not subscribing to Pay TV
- 58% of Singaporean and PR households subscribe to Pay TV

	StarHub TV only	Mio TV only	StarHub TV & Mio TV	No Pay TV
% of Households (Singaporeans and PRs)	37%	16%	5%	42%



Almost three quarters of respondents believe they have the best pay TV deal

■ Extremely Agree, Strongly Agree, Agree
 ■ Neither
 ■ Disagree, Strongly Disagree, Extremely Disagree



Consumers are generally satisfied with customer service standards of local broadcasters

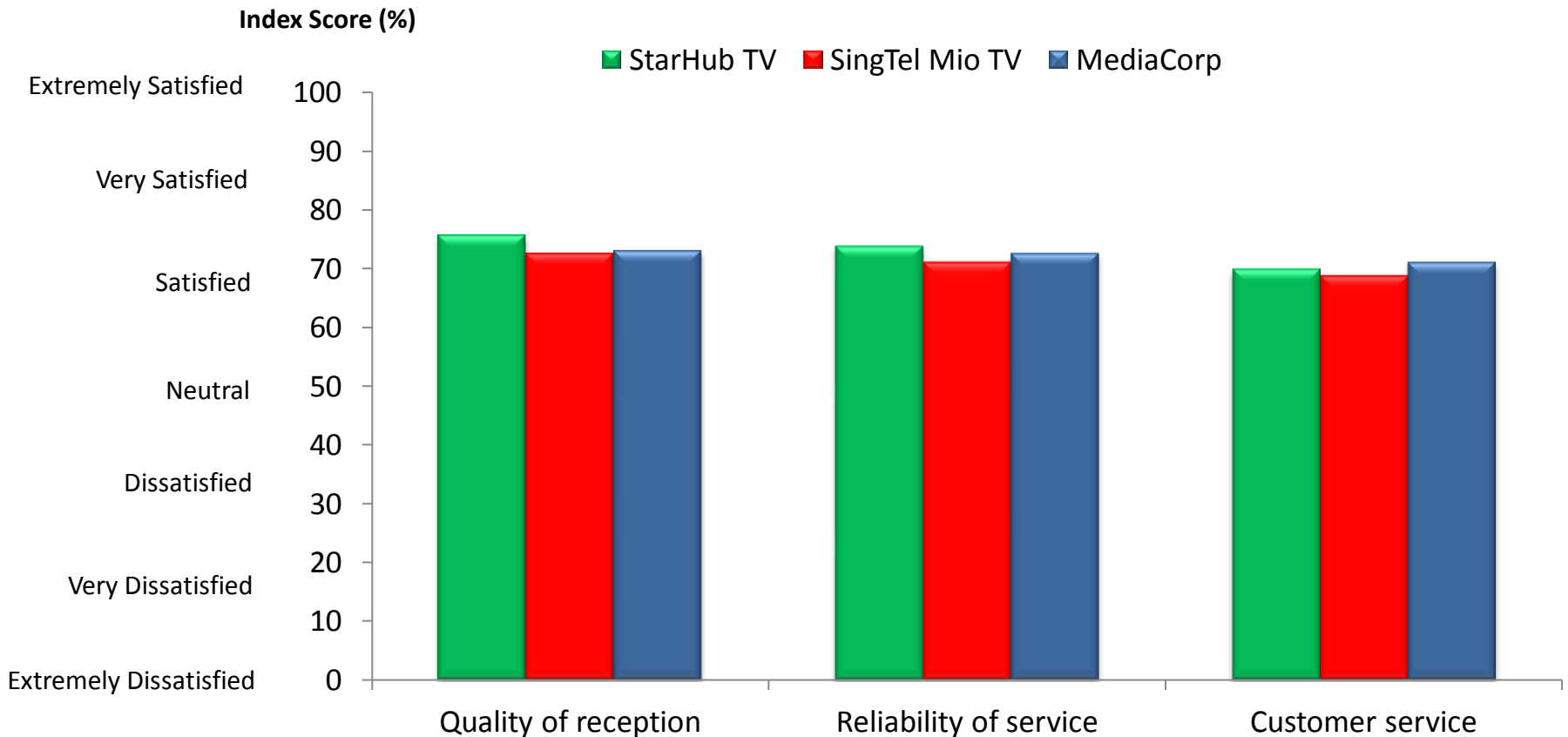
	Overall Satisfaction Index
MediaCorp	71%
StarHub TV	70%
Mio TV	69%

- **Customer service standards refer to, e.g. hotline services, counter services and technical support**
 - Reasons for dissatisfaction with broadcast media content include lack of variety, outdated programmes, inaccurate scheduling and reception woes
 - Some complaints related to pay TV are associated with long waiting times on hotlines



Consumers are generally satisfied with quality of reception, reliability of service and customer service standards of local broadcasters

Satisfaction with Local Broadcasters

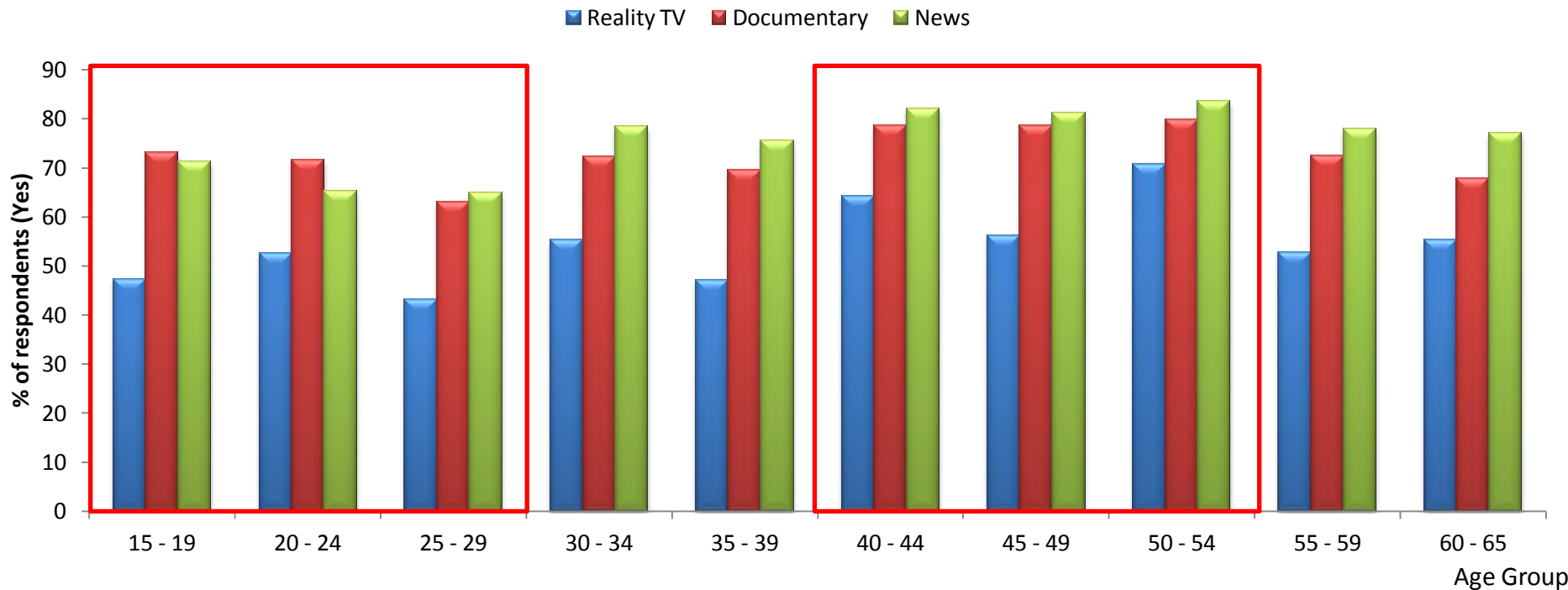


Section 3: Perceptions of media credibility



Younger consumers may be relatively more critical towards news. Older consumers may be relatively more likely to believe reality TV.

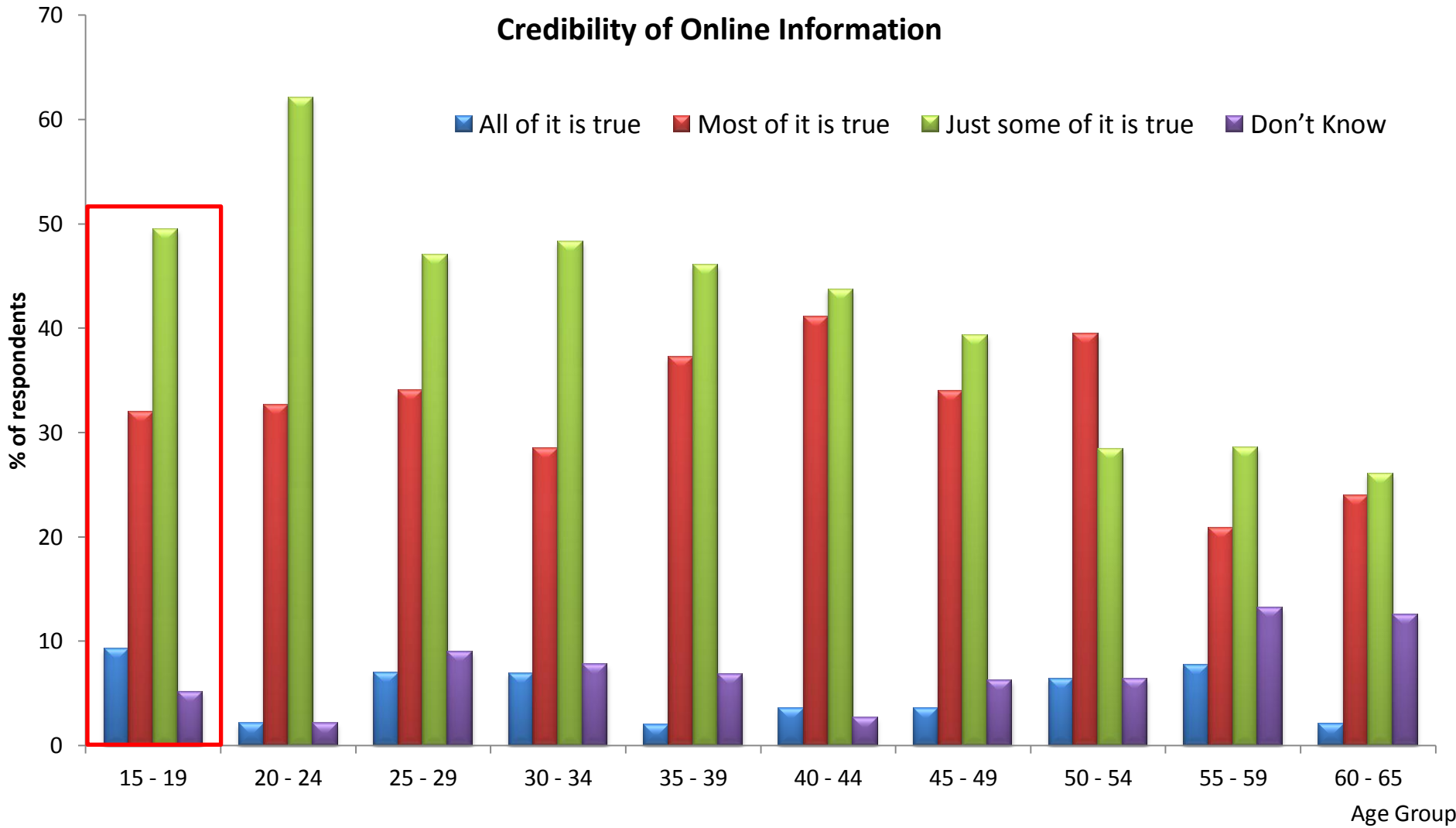
Do these programmes show a true picture of what really happened?



- Respondents aged 50-54 are most likely to believe that reality TV/documentary/News programmes show a true picture of what really happened.
- Respondents aged 25-29 are least likely to believe that reality TV/documentary/News programmes show a true picture of what really happened.



A relatively high proportion of youths aged 15-19 believe that all online news information is true.



About 35% of respondents believe that most or all of the information on websites such as blogs or Wikipedia are true

	(% of respondents with these views)				
	All True	Most True	Some True	Don't Know	N.A.
Do you believe all of the information you see on the Internet?	5%	33%	42%	7%	13%
Do you believe all of the information you see on blogs or sites such as Wikipedia?	4%	30%	49%	4%	14%

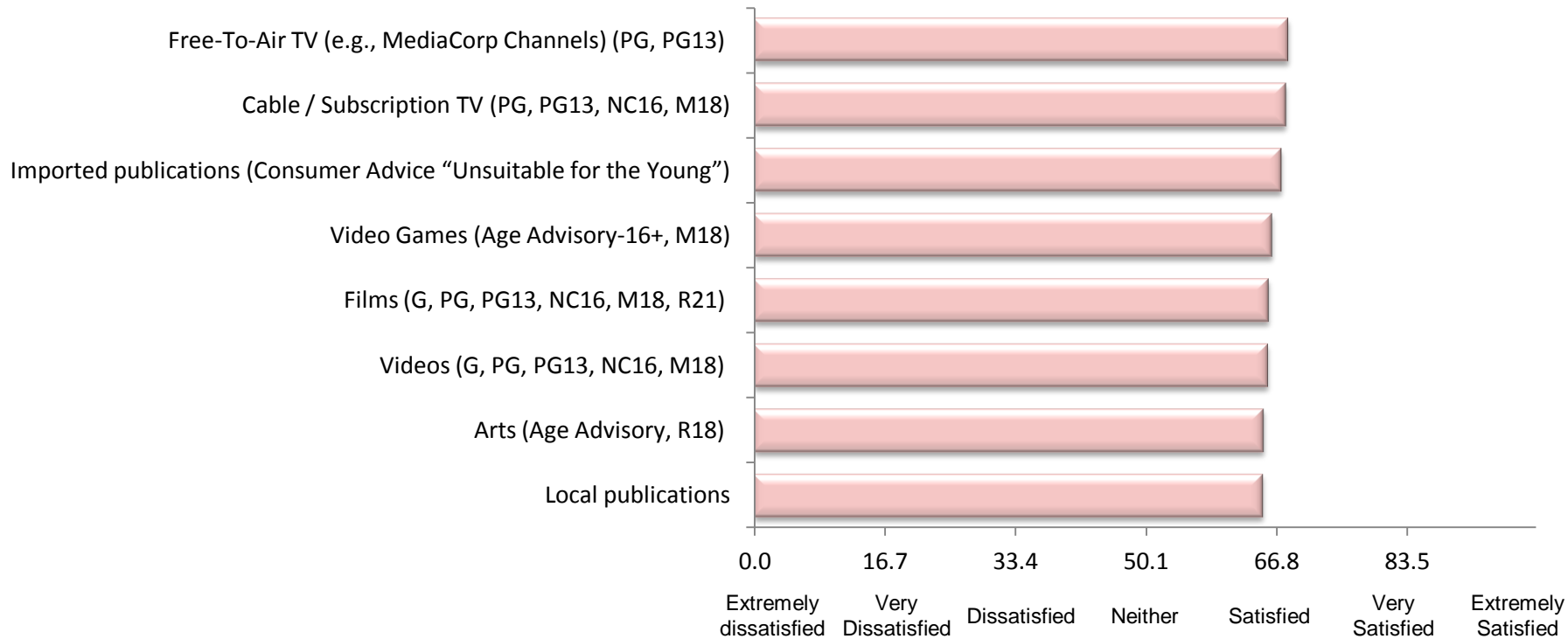


Section 4: Content Ratings and Filtering



Consumers are generally satisfied with content ratings for various media

Satisfaction with Content Ratings



- Most comments were related to a desire for further relaxation of film classification
- There were suggestions to have ratings for local publications



A majority of respondents agree on the need to protect children, but many parents are not using filters at their disposal

- 80% of respondents agreed that programmes unsuitable for children below 13 should be shown only after 10pm
- 76% of respondents who are parents with children under 21 years old do not use Internet filters
 - 32% felt there is no need to install, and 24% preferred direct parental supervision to using filters
 - Among those who installed, 64% sourced for the filters independently
- Only 16% of respondents who have children under 21 actively block access to certain pay TV channels – 27% of them are unaware of such features.



THANK YOU

