
Project CRC Survey 2010

Statement of Professional Commitment

The Nielsen Company certifies that the information contained in this report has been compiled in accordance with sound market research methodologies developed by, or for, The Nielsen Company. The Nielsen Company believes that this report represents a fair, accurate and comprehensive analysis of the information collected, with all sampled information subject to normal statistical variance.

Executive Insights

Foreword

This research report contains the findings of Project CRC Survey 2010.

In May 2009, the Ministry of Information, Communications and the Arts (MICA) announced that a mid-term Censorship Review Committee (CRC) would be convened to review and update censorship policies. The Nielsen Company was commissioned to carry out this study to help the CRC better advise MDA if its content regulation system and guidelines are in tuned with societal/community expectations and standards.

The last study on media censorship/regulation was conducted in 2002. As the new classification systems were adopted for a number of years now, it would be timely to conduct a study to review these new guidelines in the light of social and technological changes that had occurred in the past eight years.

Project CRC Survey 2010 looked at general population's attitudes and usage of current classification systems and control mechanisms. The study also garnered public's views on R21 issues across different platforms and uncensored/unclassified/obscene materials available via the Internet and video/DVD. Public opinion was also solicited on specific issues pertaining to various individual media (films/movies, FTA TV, subscription TV, videos-on-demand, mobile, publications and arts & entertainment).

This study also assessed the likelihood and methods of giving feedback as well as public's awareness of content regulation policies and guidelines. Lastly, it aimed to gather public opinion on whether appeal committees should have the final decision making power.

Research Objectives

The primary objectives of this research study were:

- To ascertain public opinion and expectations on content regulatory policies and the different content classification schemes of the different media.
- To seek public views on public education and co-regulatory initiatives

More specifically, this survey will establish the changes in public values and opinion on censorship and its implications on current policies and practices. This will hopefully serve as a basis for future revision of codes and guidelines. Results from this survey will be compared with that of eight years ago, where relevant, to look at how public opinion and expectations of censorship across the various media had changed since 2002.

Research Methodology

A random location sampling method was employed to achieve a well spread out and representative sample of residents aged 15+ in Singapore. The sampling frame came from The Nielsen Company's Master Sampling Frame, which has an updated list of households in Singapore. The sampling frame is updated on an annual basis. Key demographics were controlled to ensure an even distribution of sex, age and race within each region.

A total of 1,000 representative samples were achieved for this study. The survey was executed using face-to-face, door-to-door interviews, guided by a structured questionnaire and show cards between 1st February 2010 and 5th April 2010.

A total of 48 questions were asked, with each interview lasting about 40 minutes. Whenever necessary, show cards were displayed to the respondents in order to facilitate the flow of the questionnaire, overcome sensitive issues such as income & age as well as to aid respondents' recall via visual aids. The questionnaire and all show cards were translated into Mandarin, Malay and Tamil.

Finally, the results of the research were weighted to represent Singapore's resident population by sex, age and race for people aged 15+.

Research Design

Interview Methodology & Sampling Design

A face-to-face, door-to-door interview method was employed for this study. Interviews were guided by a structured questionnaire and show cards were shown when needed.

Random location sampling technique was employed, controlled by quotas comprising of age, sex and race variables. Multi-stage sampling was carried out to ensure both geographical & dwelling type representativeness of the sample:

- a) Selection of Primary Sampling Units
- b) Selection of households
- c) Selection of respondents

The final results of the findings were weighted up to population weights (age, sex and race) to represent Singapore's adult resident population (both citizens and permanent residents).

The final sample is representative across age, sex, race, dwelling type and geographical region.

Variable		Project CRC Survey 2010 Sample (N=1,000 Residents aged 15+)*
Sex	Male	491 (49%)
	Female	509 (51%)
Race	Chinese	759 (76%)
	Malay	127 (13%)
	Indian	86 (9%)
	Others	28 (3%)
Age	15-20	114 (11%)
	21-29	143 (14%)

*Projection based on Department of Statistics 2009 Population Statistics

Fieldwork & Quality Control

Fieldwork was conducted between 1 February and 5 April 2010. The survey was carefully supervised by The Nielsen Company's Field Manager as well as the Client Service Research team.

Given the sensitivity nature of some of the topics covered in this study, interviewers took great care to prepare the respondent beforehand, so as to minimise cases where the respondent would be offended:

- Respondents were shown an authorisation letter before the start of the survey to explain the purpose of the study.
- Respondents were warned that some questions/topics might be sensitive and that they should let the interviewer know if they felt uncomfortable with any of the questions.

All questionnaires were thoroughly checked by our team of trained questionnaire coders. Only correct and fully completed questionnaires (barring refusals for Q41, 44-47) were accepted.

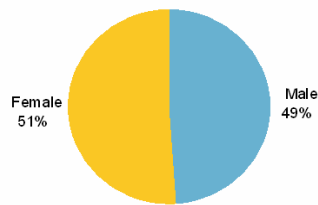
Demographic Profile

The sample used in the survey was weighted in proportion to the Singapore resident population aged 15+, in terms of age, sex and race statistics from the Department of Statistics, Singapore. A total of 1,000 Singapore residents (both citizens and permanent residents) aged 15+ were interviewed.

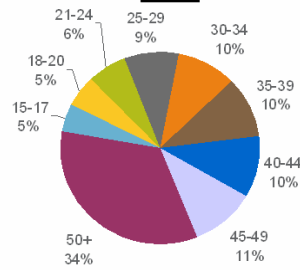
- There was equal gender split.
- In term of Age breakdown:
 - Aged 15-20 = 10%
 - Aged 21-29 = 15%
 - Aged 30-39 = 20%
 - Aged 40-49 = 21%
 - Aged 50+ = 34%
- In terms of race breakdown:
 - Chinese = 76%
 - Malay = 13%
 - Indian = 9%
 - Other Ethnic Groups = 3%
- In terms of education level breakdown:
 - Up to some Secondary = 30%
 - Completed ITE/Secondary = 29%
 - Completed A Levels = 6%
 - Completed polytechnic, university or post graduate = 35%

Demographic Profile (Q39-48)

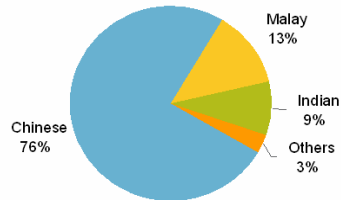
Gender



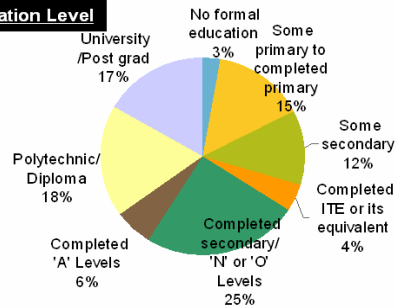
Age



Race



Education Level



Base: Singapore Citizens/PR 15+ = 3,066,000

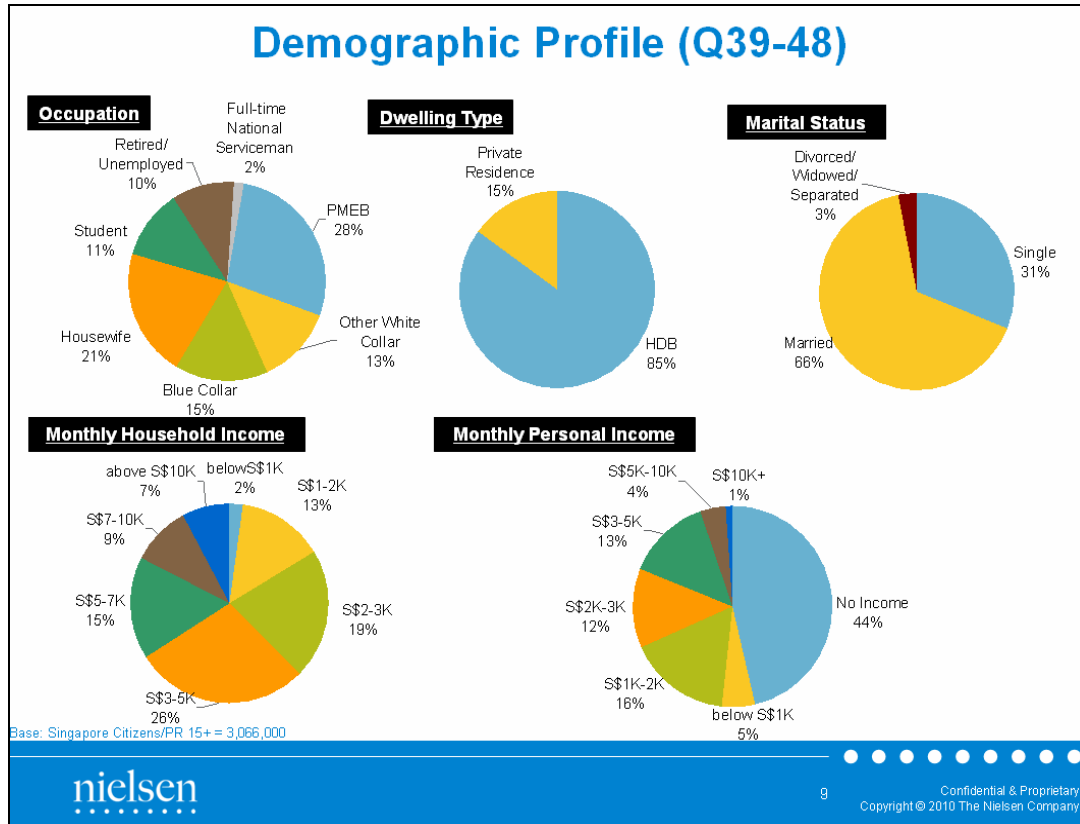
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- In term of Occupation breakdown:
 - PMEBs = 28%
 - Other White Collar = 13%
 - Blue Collar = 15%
 - Housewives = 21%
 - Students/Full-time National Serviceman = 13%
 - Unemployed/Retirees = 10%
- In terms of Marital Status:
 - Single = 29%
 - Married= 69%
 - Divorced/Widowed/Separated = 2%
- In terms of Dwelling type:
 - HDB = 85%
 - Private Residence =15%
- In terms of Monthly Household Income:
 - Below S\$2,000 = 15%
 - Between S\$2,000-S\$7,000 = 60%
 - Above S\$7,000 = 16%
- In terms of Monthly Personal Income:

- Below S\$1,000 = 5%
- Between S\$1,000-S\$5,000 = 41%
- Above S\$5,000 = 5%
- Not earning = 44%

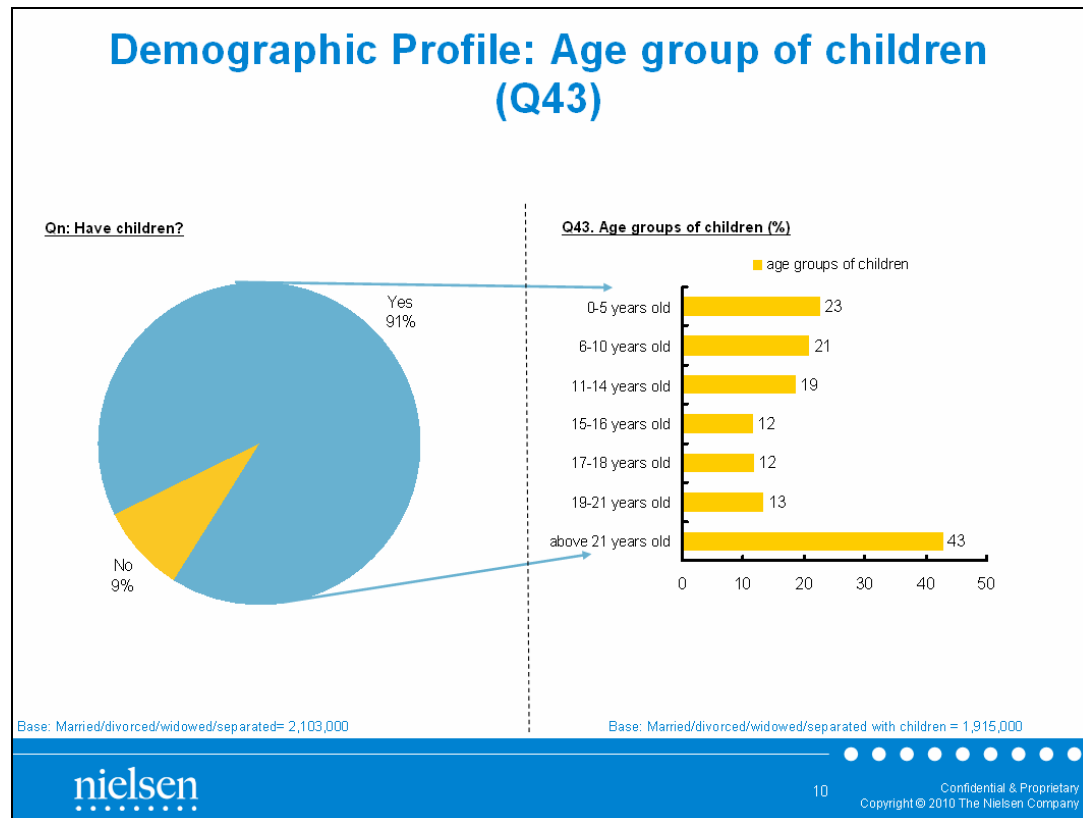


Demographic Profile: Age of Children

91% of non single respondents, who were married, divorced, widowed or separated, have children. Of which,

- 44% have children who were up to ten years old
- 19% have children in their early teens (11 to 14 years old)
- 37% have children between the age of 15 to 21 years old
- 43% have children above 21 years old

9% of non single respondents did not have children.



Key Findings

Media Consumption Profile

The research study showed that:

- Everyone ever watched FTA TV, with 78% watching it on a daily basis.
- 87% ever watched Videos/VCDs/DVDs 1 in 3 (30%) watched it infrequently at a few times per year.
- 3 in 4 (76%) ever visited cinemas. Almost half (46%) visited the cinemas infrequently at a few times per year.
- 3 in 4 (76%) ever read magazine. Magazine readers displayed varied reading habits.
- 2 in 3 (69%) ever watched subscription TV. Over half (58%) watched it on a daily/weekly basis.
- 2 in 3 (66%) ever surfed the Internet for leisure purposes. Over half (57%) went online on a daily/weekly basis.
- More than half (58%) ever watched media clips online. One third (36%) watched media clips on a daily/weekly basis.
- One third (35%) ever watched plays/drama performances. Most (30%) watched infrequently at a few times per year.
- One third (33%) ever played video games.
- 1 in 5 (21%) ever watched Videos-On-Demand (VOD).
- 62% subscribe to Subscription TV/VOD.

General Opinion on Censorship Controls for Various Media

Amongst General Population

- 3 in 4 (77%) found censorship controls for FTA TV to be “Just Right”.
- At least 64% found censorship controls for Subscription TV, Local Magazines, Movies, Videos/DVDs/VCDs to be “Just Right”.
- Less than half found censorship controls for Video games, Internet and Foreign Magazines to be “Just Right”. Higher levels of “Too Relaxed” and “Don’t Know” responses on censorship controls were noted for these three media.

Amongst Consumers of Media

- Similar trend as general population is noted.
- More than 70% felt censorship controls for FTA TV, Subscription TV, Local Magazines, Movies/Cinemas, Videos/DVDs/VCDs and Plays/ Drama Performances to be “Just Right”.
- 2 in 5 (39%) thought that censorship controls for foreign magazines are “Just Right”.

Responsibility of Protecting Minors from Inappropriate Content

- Over 80% thought that “Parents” should be responsible for protecting minors from inappropriate content with 53% citing “Parents” as most responsible.
- This is followed by 65% who thought that “Government” should be responsible for protecting minors from inappropriate content.
- 42% thought that “Industry Players” should be responsible for protecting minors from inappropriate content.
- Only 5% thought that “Citizens Committees” should be responsible of protecting minors from inappropriate content.
- Similar trend was noted amongst respondents with children.

Usage of Classification Systems and Control Mechanisms

Usage of ratings/classifications/consumer advice for personal decision

- Majority of adult population aged 15+ did not use it for most media, except for Videos/DVDs/VCDs and Cinema/Movies where equal proportions claimed that they always or sometimes personally use the classification system.

Usage of ratings/classifications/consumer advice for/on behalf of Children

- There were more users than non-users of classifications when deciding on behalf of children across all media.
- Amongst parents with children aged 0-16, over 60% ever used classification system for Videos/DVDs/VCDs, FTA TV, Movies and Subscription TV.

Parental Lock/Control Mechanism

- Public awareness of parental lock/control mechanism is low at 34%
- Higher awareness level at 54% is noted amongst subscription TV/VOD subscribers who are parents of young children aged 0-10. However, this group of respondents had low usage of parental lock/control mechanism at 39% while one third (32%) is not interested to find out about usage.

Family Access Network (FAN)

FAN subscription is low amongst general population (8%) and target group (parents who are internet users with children aged below 14) (17%).

R21 Issues across Platforms

- About 3 in 5 (57%) felt R21 films should continue to only be allowed for viewers aged 21 and above.
- 7 in 10 (68%) felt that there should be minimal censorship in R21 films.
- 60% do not support R21 films being screened in cinemas within HDB estates.
- Half (52%) did not think R21 rating should be introduced for video games with more explicit content going beyond M18 rating.
- 58% agreed that R21 films can be made available for sale as Videos/ DVDs/VCDs. 44% preferred sales of R21-rated Videos/DVDs/VCDs at controlled locations while 14% did not see a need for location restrictions.
- Spilt views were noted on whether R21 ratings should be extended to Subscription TV/VOD services that have parental lock mechanisms in place. 38% were in favour of extending ratings to Subscription TV/VOD while 41% thinks it's sufficient to continue with current classification system.

Views on 100-site Ban

- 2 in 3 (67%) were in favour of the Government keeping/expanding the ban on 100 high impact websites. There were proportionately more (38%) who were supportive of expanding the ban as compared to those who opted to keep the ban. Similar trend is noted amongst respondents with children and internet users.

Film Classification System

- At least 3 in 4 (78%) think that all movie ratings categories should be retained.
- Half (49%) were in support of having an additional rating such as PG13 to indicate unsuitable content in PG films for younger children. Similar trend was seen amongst cinema goers and parents with children aged 0-14.

Broadcast Ratings & Contents

- 3 in 5 (64%) felt that content higher than PG classification could be allowed on FTA TV from 11pm – 6am.

- About half (48%) were in favour of standardizing ratings for Subscription TV/VOD with films/videos/DVDs, especially for parents with children aged 0-10 (60%). About one third (35%) felt that the two current different rating systems should co-exist.

Mobile Content

- 68% felt that TV and video contents via mobile phones should be subjected to some form of content rules and regulation.

Publications

- Among consumers of local magazines, 78% found censorship controls for local publications to be just right, while 11% felt that they were too relaxed.
- 2 in 3 (67%) thought that current measures of shrink wrapping foreign magazines and attaching advisory labels are sufficient in limiting access by the young.
- 3 in 4 (74%) thought that local adult-interest magazines should also be subjected to the same measures as foreign-adult interest magazines.
- Half (51%) felt that the same set of content standards should be applied for both local and foreign magazines (magazines with sexually suggestive covers as well as adult themed articles e.g. homosexuality, explicit descriptions of sex). Those who were against applying the same content standards on local and foreign magazines held split views on what the content standards should be. 17% felt that the content standards for local publications should be stricter, while 20% felt that it should be stricter for foreign publications.
- Half (54%) objected on allowing Playboy magazines to be allowed in Singapore even if they were wrapped in opaque bags/wrappers.

Arts Performances

- The general population held split views on having censorship for R18 rated arts performances. 42% were in support of having no censorship while 37% think otherwise.
- Half (52%) agreed that current consumer advice provided for arts performances is sufficient on providing information on arts performance content.
- 3 in 4 (75%) saw the need to inform and alert the audiences when homosexual content is present within an arts performance. One third (35%) felt that “homosexual content” should be specifically highlighted in the advisory.

Public Education/Feedback

- 3 in 4 (74%) would not give feedback if they were unhappy with something they read/saw/heard in any media.
- Amongst those who would or might give feedback (26%), 64% had the knowledge on how to go about doing it. Out of those with the knowledge on how to give feedback, more than half would contact relevant media owners (62%) and feedback to the authority via hotline, online feedback forms, emails, and letters (55%).
- Close to half (48%) agreed that there is good communication of content regulatory policies and guidelines to the public.
- 2 in 3 (65%) were aware of content regulation policies and guidelines.
- More would prefer to obtain information on content regulatory policies and guidelines from the media (58%) as compared to from MDA/MICA websites (42%).

Appeal Committees

- 55% think that the appeal committees should have the final decision-making power (i.e. its decision can override that of MDA and MICA). There is a big group of 40% who thinks otherwise.

Detailed Findings

Media Consumption Profile

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Frequency of Media Consumption• Household subscription to subscription TV/Video-on-demand
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Frequency of Media Consumption

Of all media tracked, TV is the most ubiquitous, with almost all respondents reporting they had ever viewed FTA TV. For close to 80% of these respondents, FTA TV viewing is a daily affair.

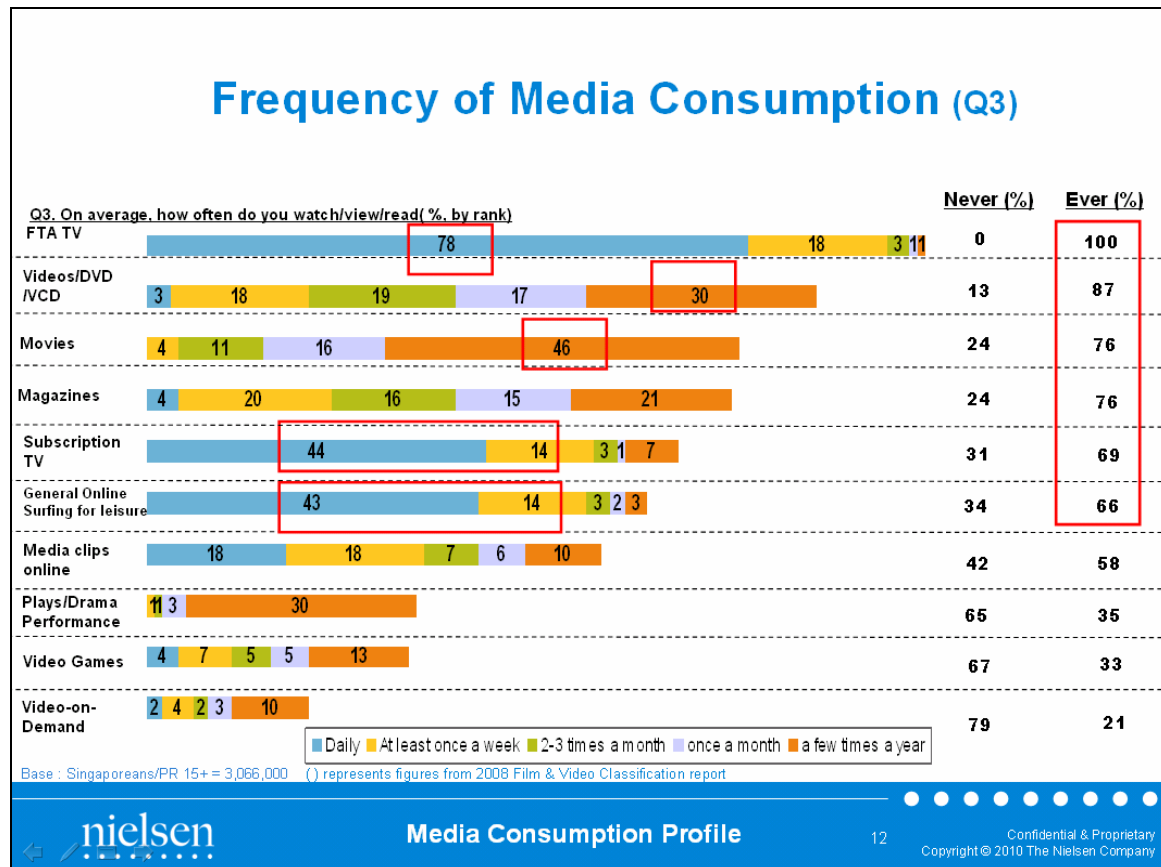
90% of all respondents had ever viewed Videos/DVDs/VCDs. However, the majority of the respondents were infrequent viewers (30%), only viewing Videos/DVDs/VCDs a few times a year.

3 in 4 respondents had ever watched movies, with nearly half of the respondents watching movies a few times a year.

Similarly, 3 in 4 respondents had ever read magazines. However, the respondents' magazine reading frequencies were more varied.

2 in 3 respondents had ever watched subscription TV, with more than half of the respondents watching subscription TV on a daily or weekly basis.

2 in 3 respondents had ever surfed online in general for leisure, with more than half of the respondents surfing online in general for leisure on a daily or weekly basis.

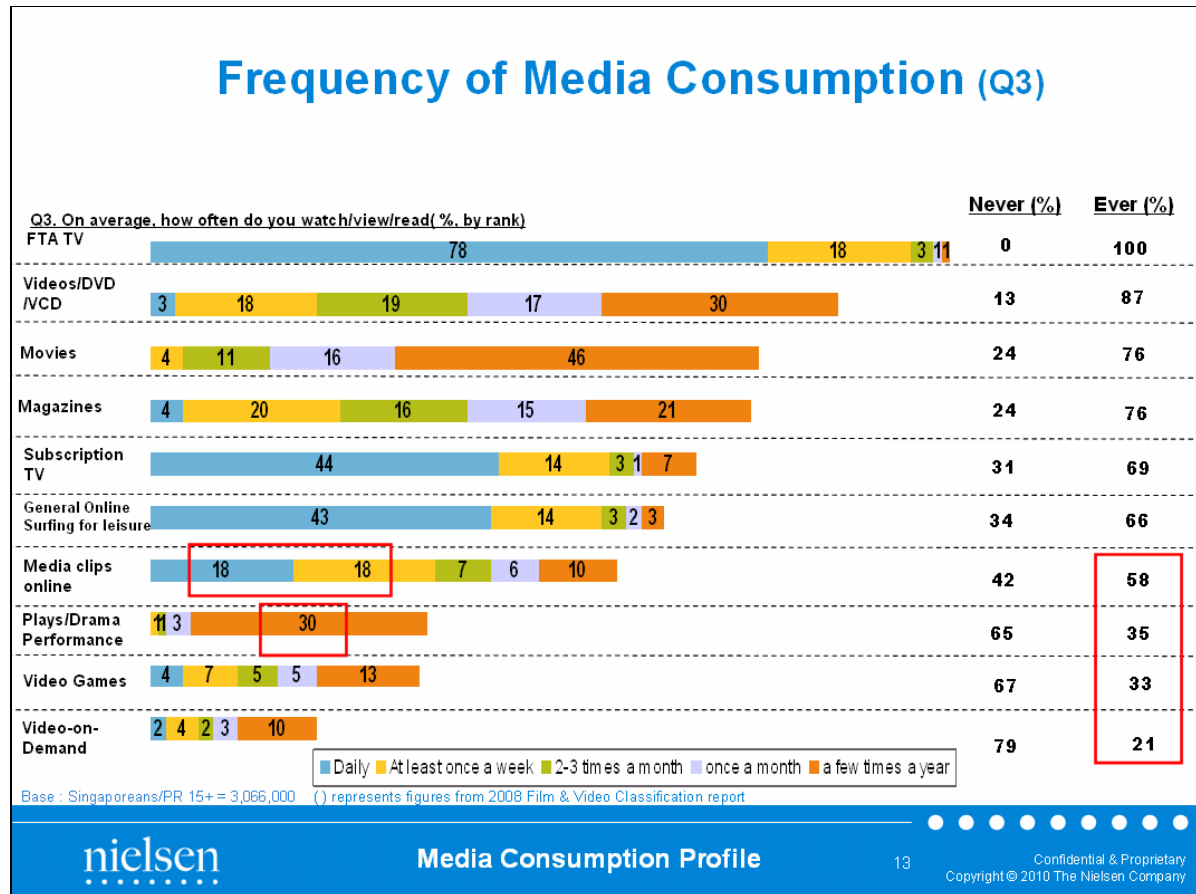


More than half of all the respondents had ever watched media clips online, with 1 in 3 of the respondents watching media clips online on a daily or weekly basis.

1 in 3 respondents had ever attended plays or drama performances, with 30% of the respondents attending plays or drama performances at a few times a year.

1 in 3 respondents had ever played video games.

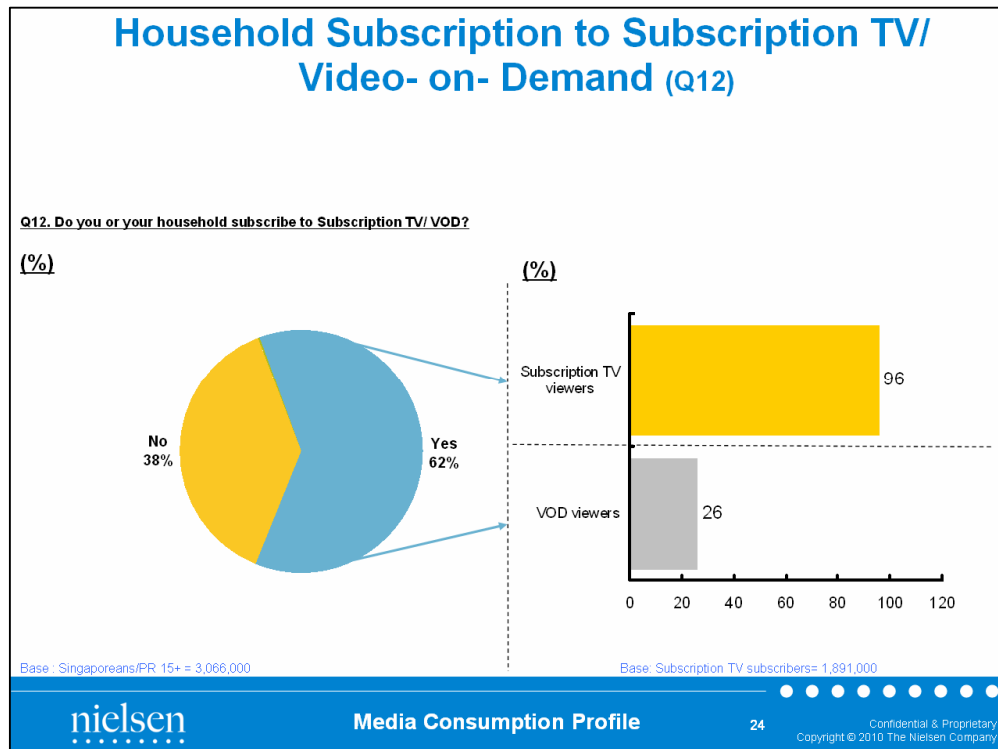
Only 1 in 5 of respondents had ever watched Video-on-demand.



Household Subscription to Subscription TV/Video-On-Demand

About 3 in 5 (62%) of all respondents subscribed to subscription television or Video-on-demand.

Amongst these subscribers, almost all of the subscribers (96%) had ever viewed subscription TV while 1 in 4 of the subscribers (26%) had ever viewed Video-on-demand.



General Opinion on Censorship

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Overall view on the classification systems• Views on the responsibility of protecting minors from inappropriate content
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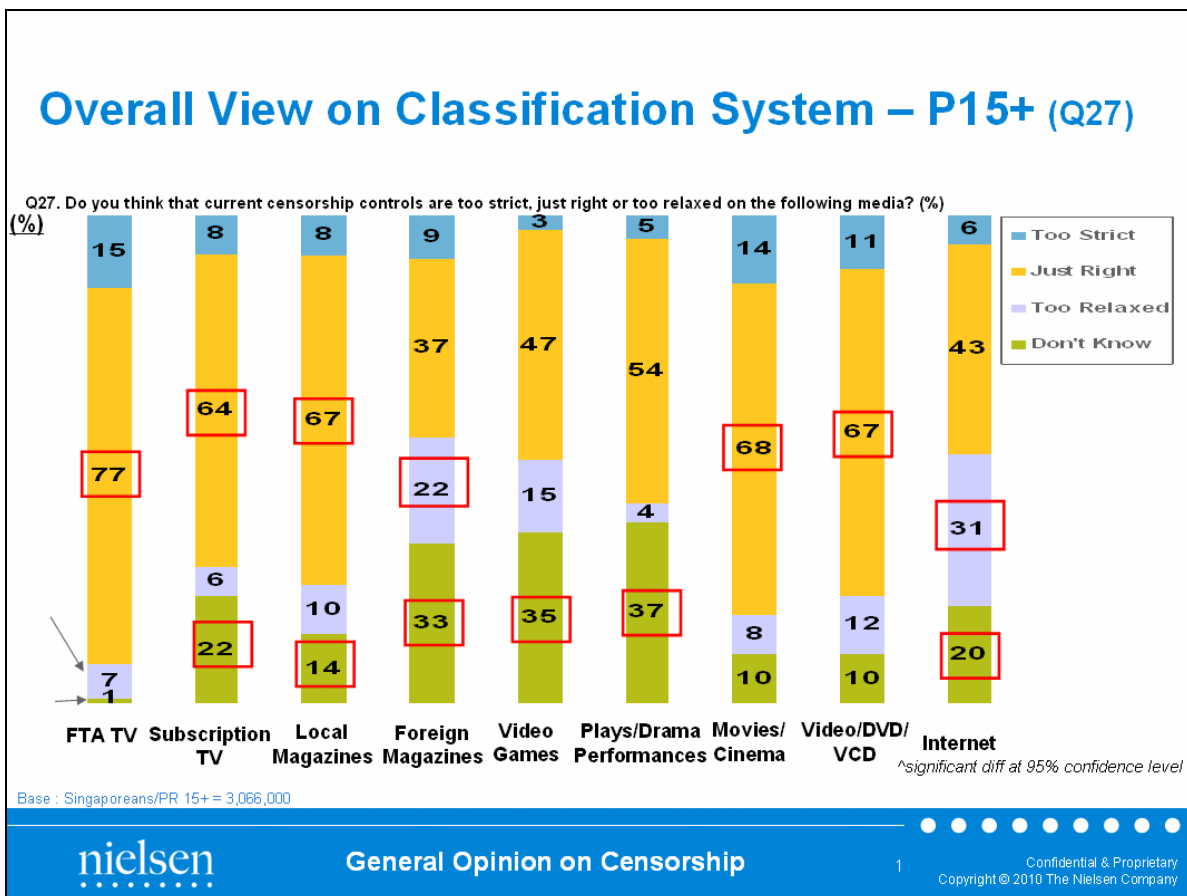
Views on Classification Systems – General Population

Across media among the general population (which includes those with and without experience with the different media), FTA TV registered the highest “Just Right” levels in terms of censorship controls. 3 in 4 respondents found censorship controls for FTA TV to be just right.

High levels of over 60% also found censorship controls for subscription TV, local magazines, movies and Videos/ DVDs/VCDs to be just right.

A sizeable proportion of the respondents had no opinions on censorship controls for subscription TV (22%), foreign magazines (33%), video games, the Internet and plays or drama performances.

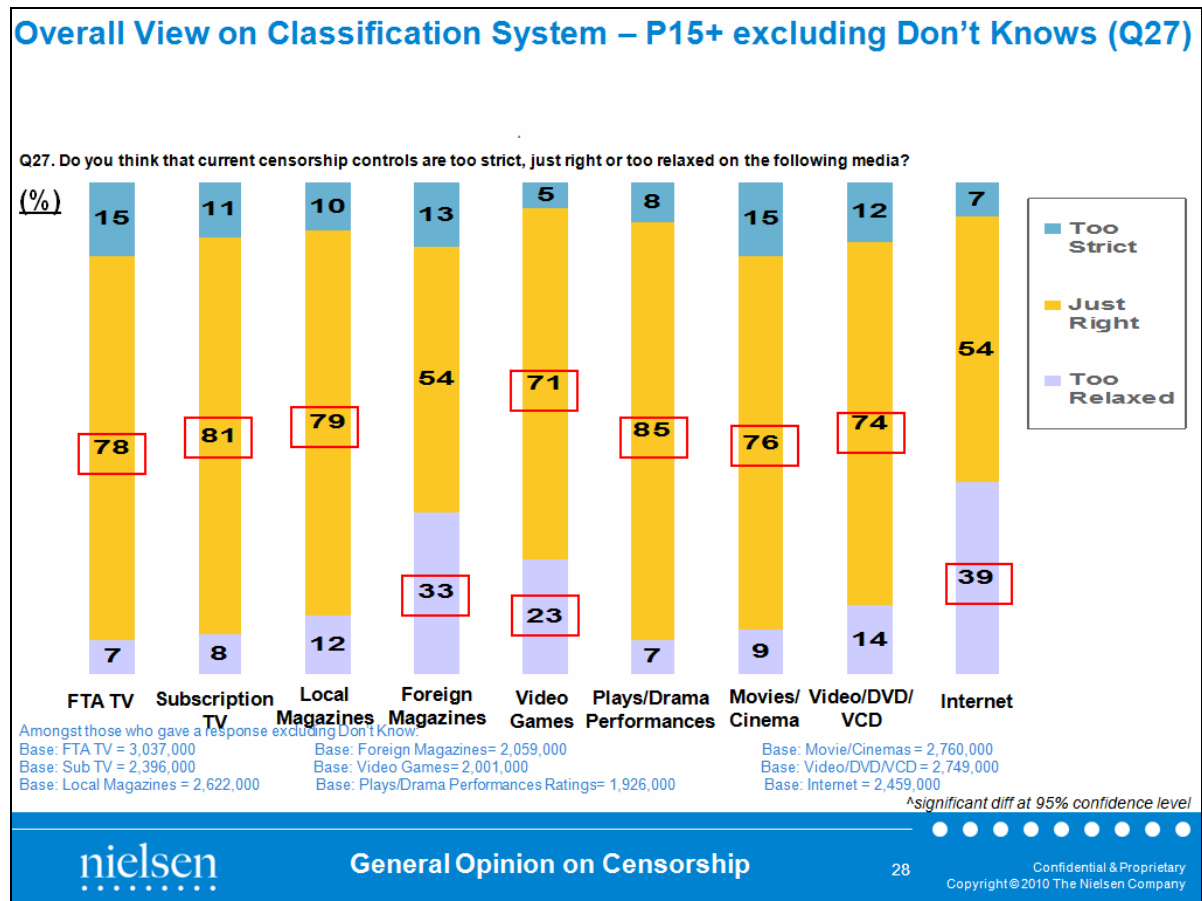
A sizeable proportion of respondents found censorship controls for foreign magazines (22%) and the Internet (31%) to be too relaxed.



Disregarding those respondents who were unable to give a comment (ie. those who said "Don't Know"), more than 70% of respondents who gave a response found censorship controls for most media to be just right.

The only exceptions were foreign magazines and the Internet.

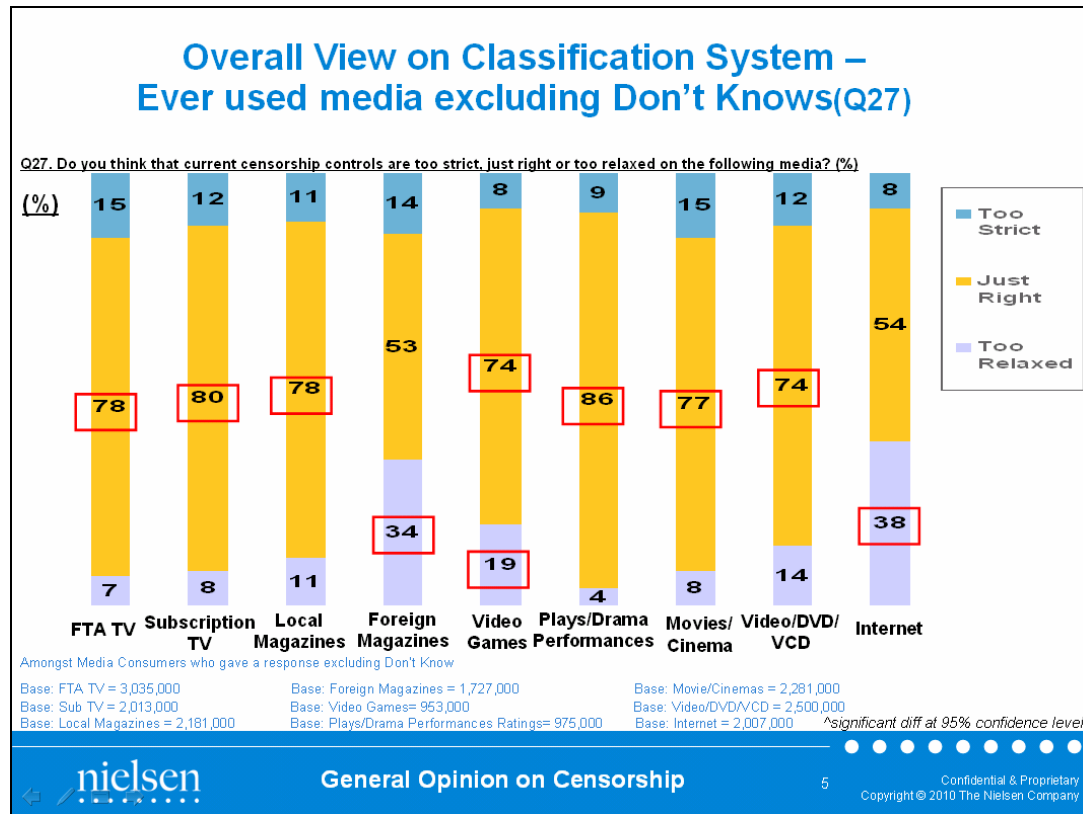
A considerable proportion of found censorship controls for foreign magazines (33%), video games(23%) and the Internet (39%) to be too relaxed.



Views on Classification Systems – Media Users

Disregarding those media users who were unable to give a comment (i.e. those who said “Don’t Know”), over 70% of media users find censorship controls for most media to be just right.

Higher levels of “too relaxed” are noted for foreign magazines (34%), video games (19%) & the Internet (38%).



“Too Strict”

The profile of the general population public and specific media user groups who found the classification system of the different media to be “Too Strict” is summarised and highlighted below:

Overall View on Classification System (Q27)		
Media	Profile of P15+ who say “ Too Strict”	Profile of media users who say “Too Strict”
FTA TV	<ul style="list-style-type: none"> - People aged 21-39 - Chinese - Received tertiary education - PMEB - 3-5K income earners 	
Subscription TV	<ul style="list-style-type: none"> - Males - PMEB - 3K+ income earners 	<ul style="list-style-type: none"> - Males - PMEB - Chinese
Local Magazines	- People aged 30-39	
Foreign Magazines	<ul style="list-style-type: none"> - 3-5K income earners - Non HDB dwellers 	- Non HDB dwellers
Video Games	<ul style="list-style-type: none"> - People aged below 21 - Singles - Students 	Profile similar to general population
Plays/Drama Performances	Profile similar to general population	
Movies/Cinemas	<ul style="list-style-type: none"> - People aged 21-29 - Singles - PMEB - Received tertiary education 	<ul style="list-style-type: none"> - Singles - PMEB - Received tertiary education
Video/DVD/VCD	<ul style="list-style-type: none"> - Males - Received tertiary education - 3-5K income earners - PMEB 	<ul style="list-style-type: none"> - Males - PMEB
Internet	- People aged 21-29	Profile similar to general population

“Just Right”

The profile of general population and specific media user groups who found the classification system of the different media to be “Just Right” is summarised and highlighted below:

Overall View on Classification System (Q27)		
Media	Profile of P15+ who say “Just Right”	Profile of media users who say “Just Right”
FTA TV Local Magazines Video/DVD/VCD	Profile similar to general population	
Subscription TV	Profile similar to general population	-Female
Foreign Magazines	<ul style="list-style-type: none"> - People aged below 30 -Students -Singles -Received tertiary education -Above 5K income earners 	
Video Games	<ul style="list-style-type: none"> - People aged below 30 - Students - 3-5K income earners - Singles - Received tertiary education 	- Divorced/Widowed/Separated
Plays/Drama Performances	<ul style="list-style-type: none"> - People aged 21-29 - Received tertiary education - 2-3K income earners - Singles - Students, White Collar 	-Received some secondary education or less
Movies/Cinemas	- Above 5K income earners	<ul style="list-style-type: none"> -Parents with children (aged 11-16) -Received some secondary education or less -Below 1K income earners
Internet	<ul style="list-style-type: none"> - People aged below 40 - Singles -Students, PMEB -Received tertiary education 	Profile similar to general population

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“Too Relaxed”

The profile of general population and specific media user groups who found the classification system of the different media to be “Too Relaxed” is summarised and highlighted below:

Overall View on Classification System (Q27)		
Media	Profile of P15+ who say “Too Relaxed”	Profile of media users who say “Too Relaxed”
FTA TV Local Magazines	-Non Chinese	
Subscription TV	-Malays, Indians	
Foreign Magazines	-Malays, Indians - Non HDB dwellers	-Malays, Indians - Parents with children (aged 0-10)
Video Games	- People aged 30-39 -Non Chinese -Parents with children aged below 17 -Received tertiary education - 2-3K income earners, -non HDB dwellers	-Parents with children (aged 0-10)
Plays/Drama Performances	-Non Chinese	-Malays
Movies/Cinemas		-Malays, Indians
Videos/DVDs/VCDs	-Malays, Indians -Divorced/Widowed/Separated	-Malays, Indians
Internet	-Indians, Other races -Parents with children (aged 11-16) - Received tertiary education, PMEB -Non HDB dwellers	-Parents with children (aged 11-16) - Non HDB dwellers


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“Don’t Know”

Below is the summarised profile of general population and specific media user groups who were unable to provide a comment:

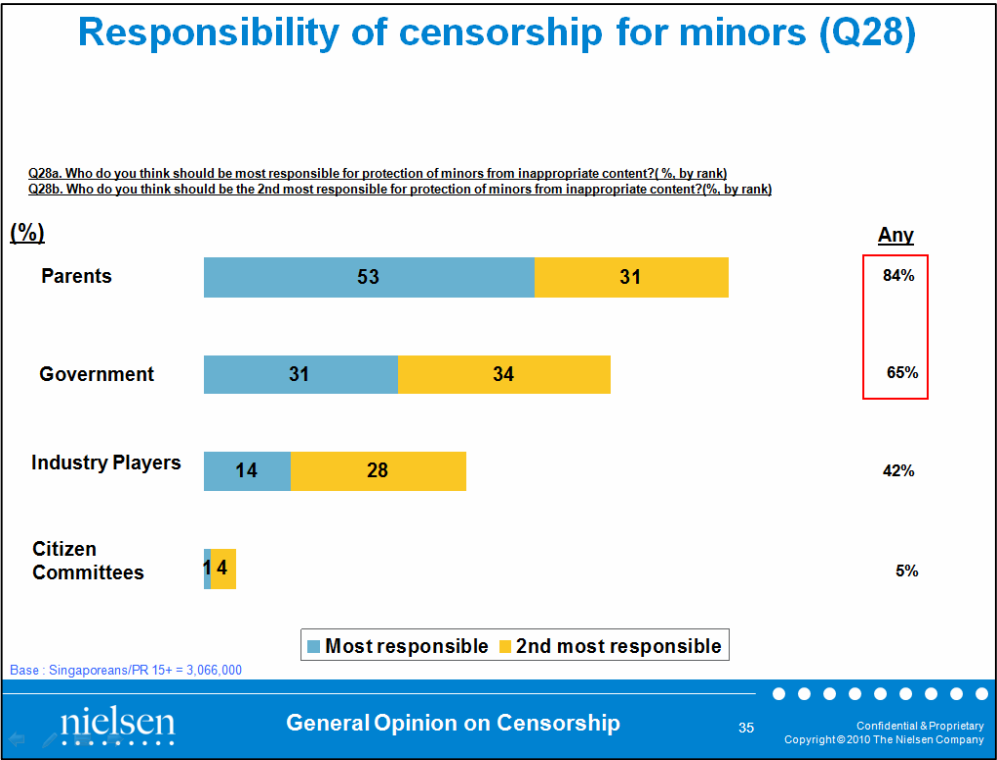
Overall View on Classification System (Q27)		
Media	Profile of P15+ who say “Don’t Know”	Profile of <u>media users</u> who say “Don’t Know”
FTA TV	Profile similar to general population	
Subscription TV	<ul style="list-style-type: none"> - People aged above 50 - Divorced/widowed/separated - Received some secondary education or less - Housewives 	Profile similar to general population
Local Magazines	<ul style="list-style-type: none"> - People aged above 50 - Below 1K income earners - Received some secondary education or less - Blue collar, Retired/Unemployed 	
Video Games	<ul style="list-style-type: none"> - People aged above 50 - Below 1K income earners - Non singles - Parents with children (aged 17-21) - Received some secondary education or less - Blue Collar, Housewives, Retired/Unemployed 	
Foreign Magazines	<ul style="list-style-type: none"> - People aged above 40 - Below 2K income earners - Blue collar, Housewives - Parents with children (aged 17-21) - Divorced/widowed/separated - Received some secondary education or less 	<ul style="list-style-type: none"> - People aged above 40 - Below 2K income earners, blue collar - Parents with children (aged 17-21) - Divorced/widowed/separated - Received some secondary education or less

Overall View on Classification System (Q27)		
Media	Profile of P15+ who say “Don’t Know”	Profile of <u>media users</u> who say “Don’t Know”
Plays/ Drama Performances	<ul style="list-style-type: none"> - People aged above 50 - Malays - Parents with children (aged 11-21) - Received some secondary education or less - Blue collar, Housewives - Below 1K income earners 	Profile similar to general population
Movies/Cinemas	<ul style="list-style-type: none"> - People aged above 50 - Malays - Divorced/Widowed/Separated - Parents with children (aged 17-21) - Full-time Housewives - Received some secondary education or less 	
Internet	<ul style="list-style-type: none"> - People aged above 50 - Below 1K income earners, Non income earners - Received some secondary education or less - Divorced/widowed/separated - Blue Collar, Housewives, Retired/Unemployed 	
Video/DVD/VCD	<ul style="list-style-type: none"> - People aged above 50 - Non income earners - Received some secondary education or less - Housewives 	<ul style="list-style-type: none"> - People aged above 50 - Housewives

Responsibility of Protecting Minors from Inappropriate Content

Over 80% of the respondents thought that parents should be responsible for protecting minors from inappropriate content.

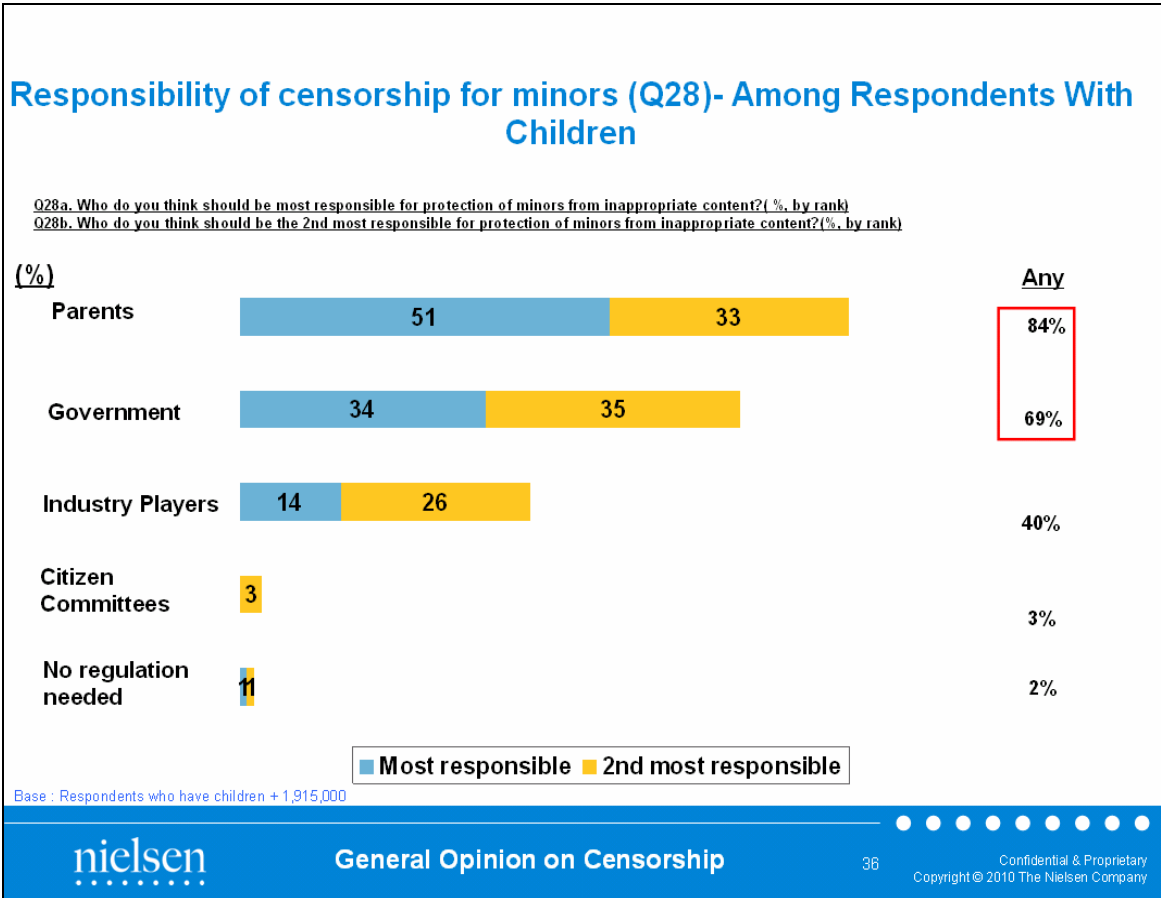
2 in 3 respondents thought that the government should be responsible for protecting minors from inappropriate content.



Respondents with children have similar sentiments.

Over 80% of respondents with children thought that parents should be responsible for protecting minors from inappropriate content.

Almost 70% of respondents with children thought that the government should be responsible for protecting minors from inappropriate content.



Usage of:

(a) Ratings/Classifications/Consumer Advice

(b) Parental Lock/Control mechanism

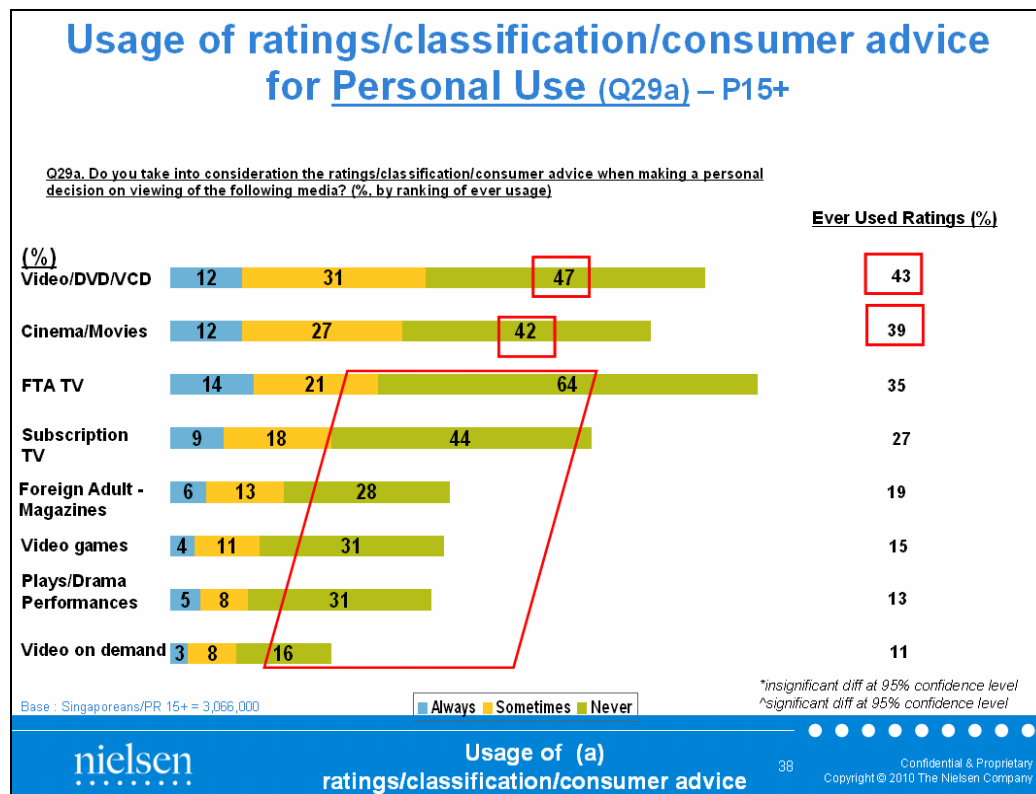
(c) Family Access Network (FAN)

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Usage of ratings/classification/consumer advice for personal use and on behalf of children• Awareness and usage of the parental lock and control mechanisms• Family Access Network (FAN) subscription and the reasons for using FAN
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Usage of: (a) Ratings/Classification/Consumer advice

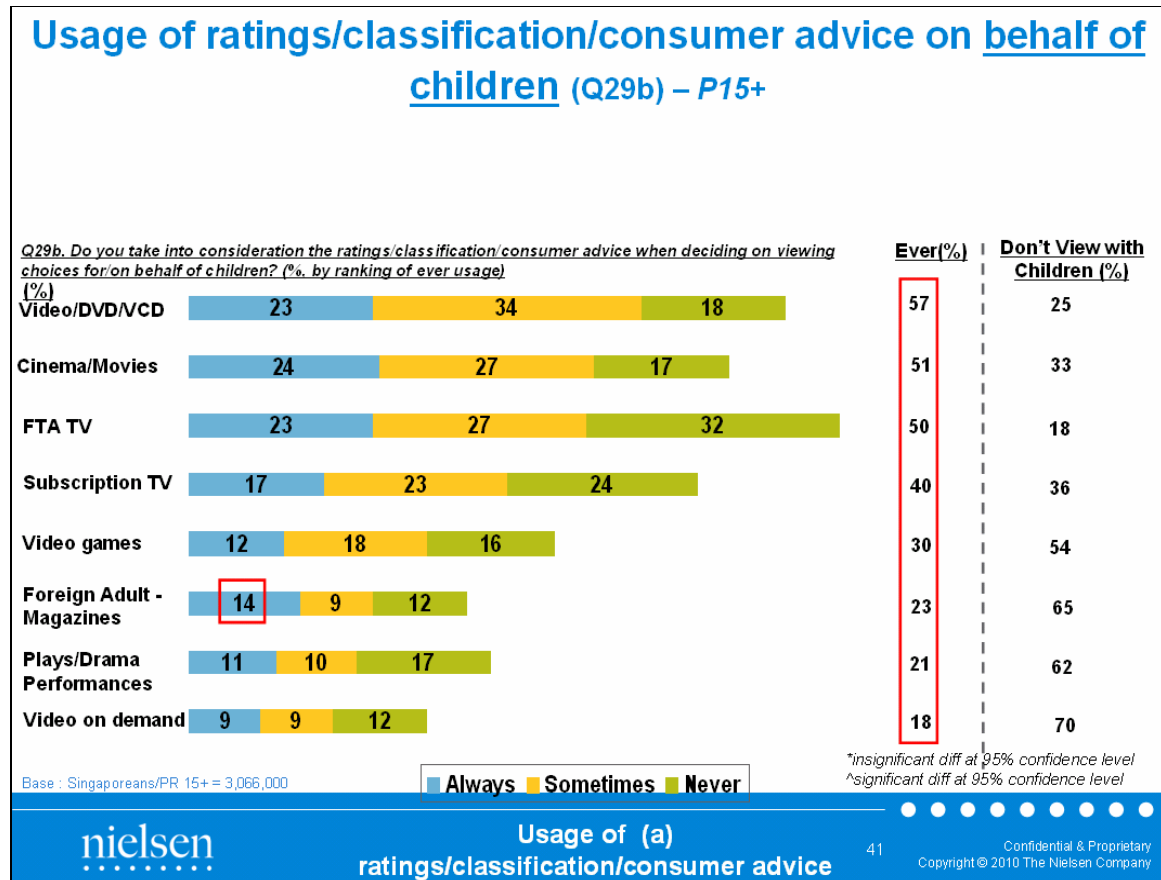
In general, majority of people do not use ratings/classifications/consumer advice when it comes to making a personal choice on viewing the different media. Only with the exception of Videos/DVDs/VCDs and movies do we see that the use of ratings/classification/consumer advice was divided.

For all other media, especially for FTA TV (64%) and subscription TV (44%), there are more non-users than users of ratings/classification/ consumer advice.



Usage of: (a) Ratings/Classification/Consumer Advice – on Behalf of Children

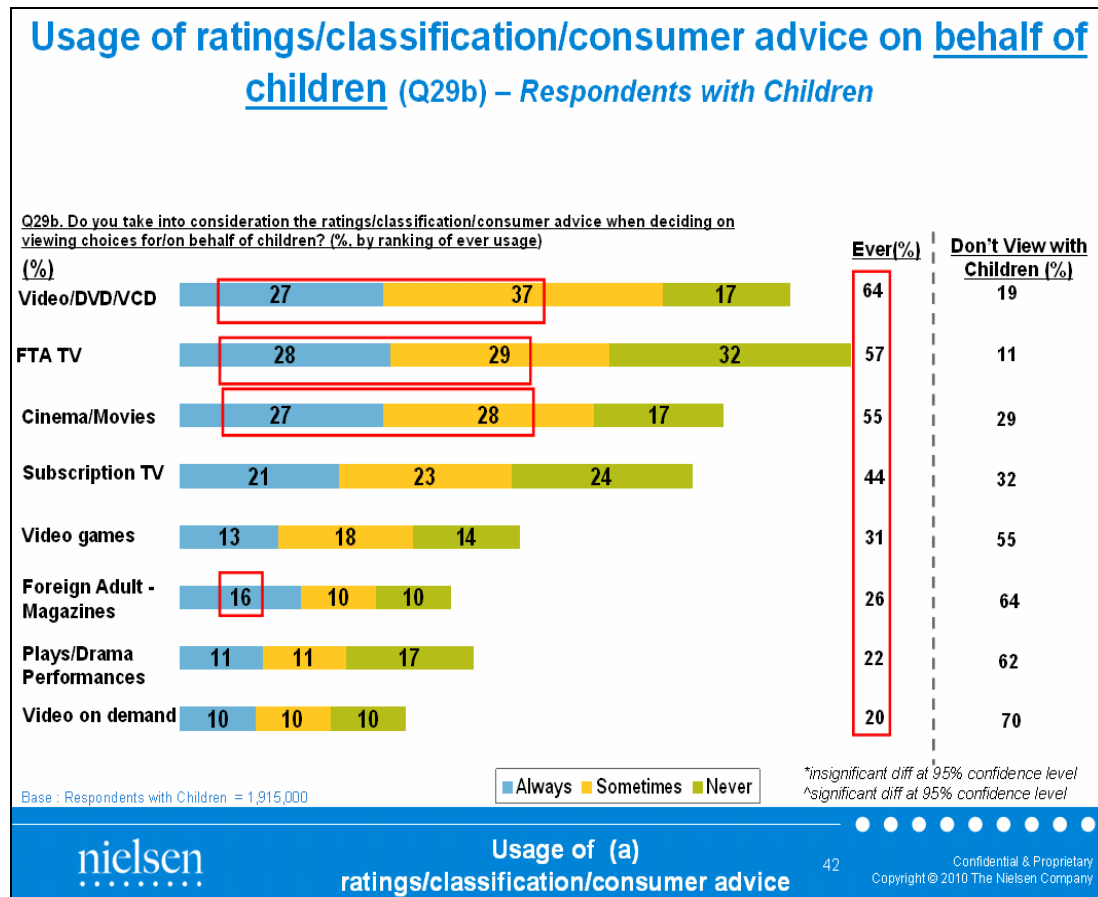
With regard to the usage of ratings/classification/consumer advice on behalf of children, there were more users than non users.



The usage trend is also similar among respondents with children regardless of whether the children are younger (0-10) or older (11-16).

There were more users than non users of ratings/classification/consumer advice when it came to making a decision on behalf of children across all of the media.

Over half of the respondents with children had ever used ratings/classification for Videos/DVDs/VCDs, FTA TV and movies.



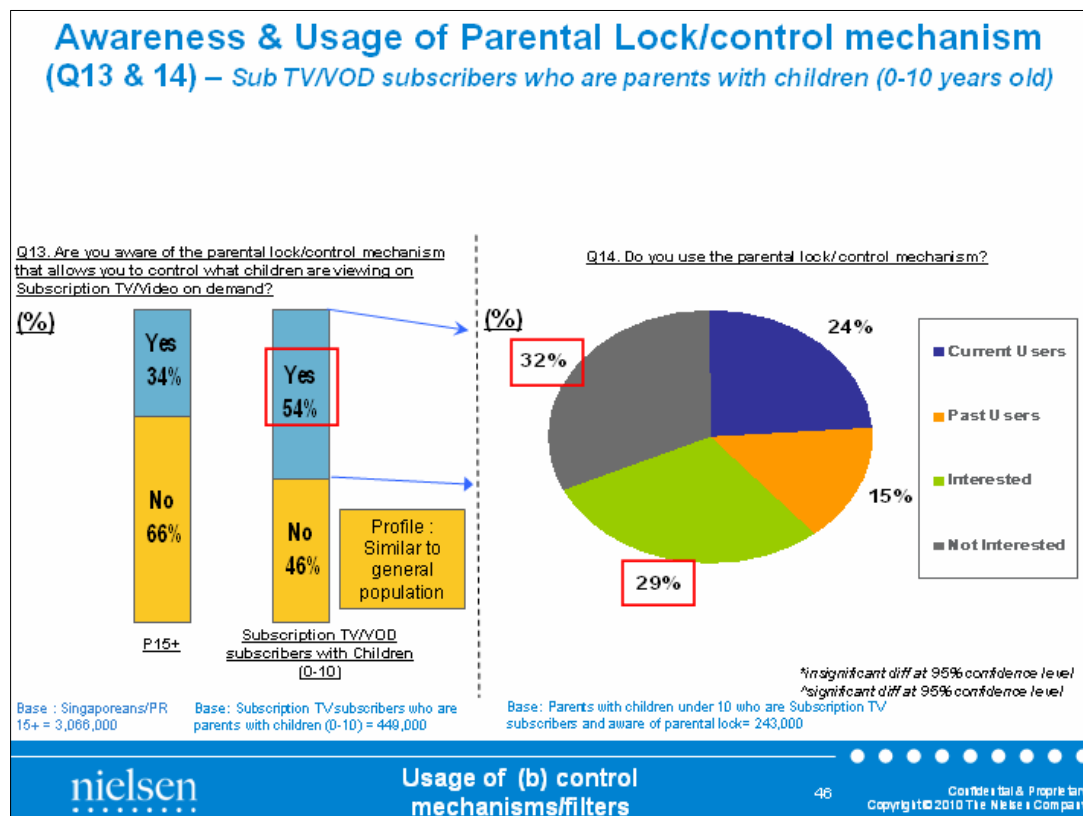
Usage of: (b) Parental Lock/Control Mechanisms

Amongst subscription TV/Video-on-demand subscribers who have children (0-10 years old):

Awareness of parental lock/control is divided. With 54% of these subscribers being aware and 46% of these subscribers being unaware. However, their awareness levels were higher than that of the general population.

Among those who were aware of the mechanism 39% had some experience using it.

Non users of the mechanism held divided interest in the parental lock/control mechanism, with 29% of them being interested in knowing how to use it as opposed to 32% of them who were uninterested.



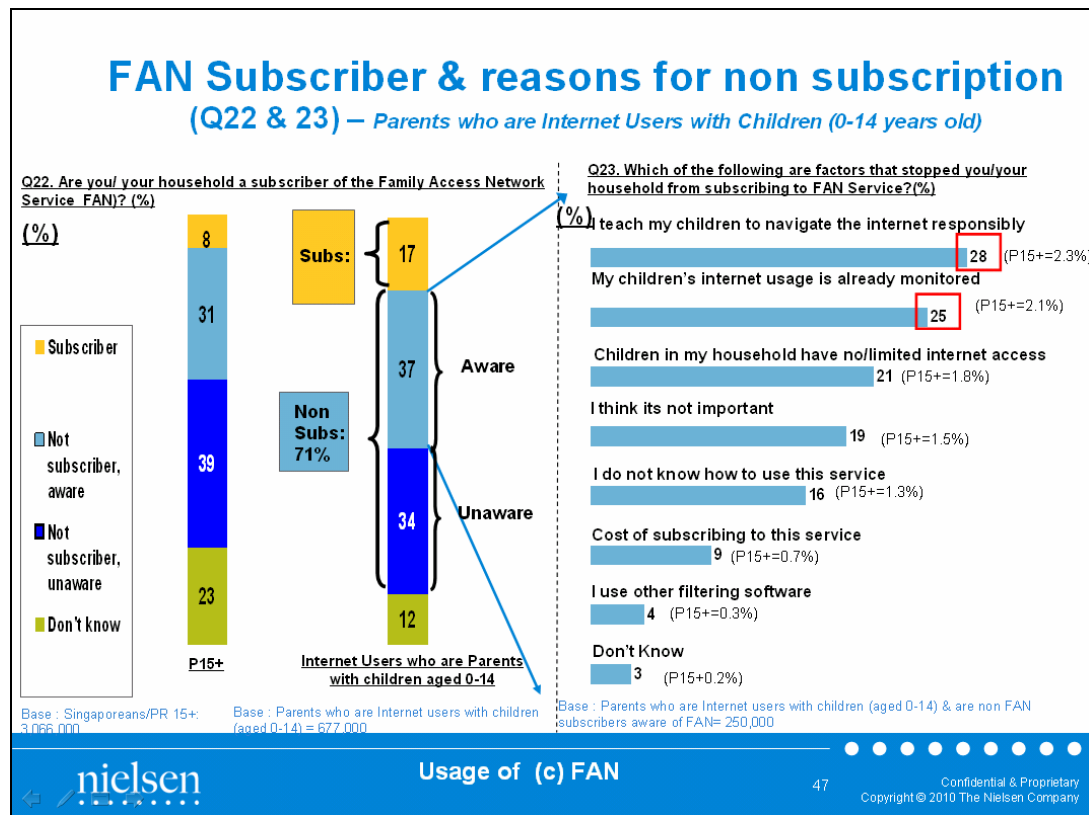
Usage of: (c) Family Access Network (FAN)

The majority of parents with young children (aged 0-14) and who were internet users, were found to be non FAN subscribers (71%). Only 17% were FAN subscribers.

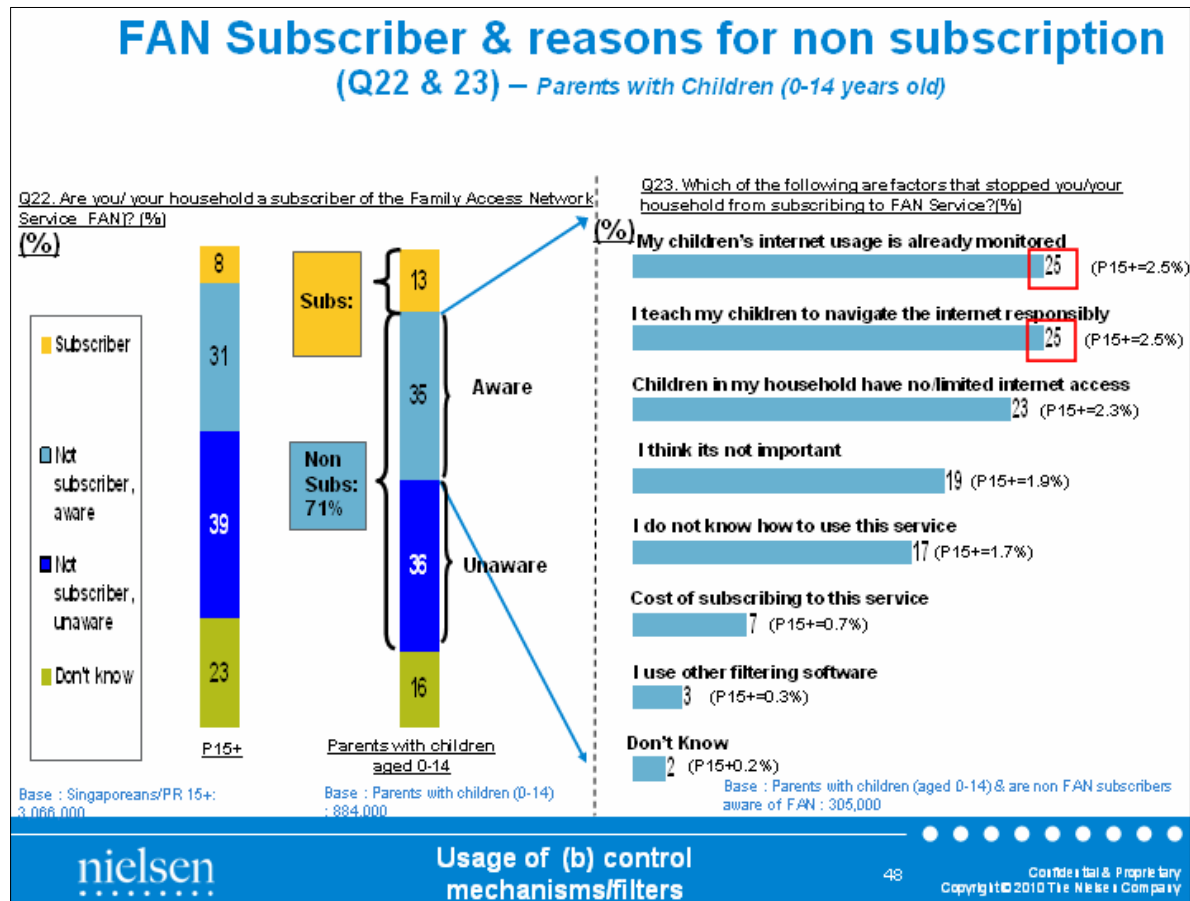
Of the 71%, 37% were aware of FAN.

The top factors for non subscription cited were that these non subscribers were already teaching their children to navigate the Internet (28%) and that they were already monitoring their children's internet usage (25%).

The cost of subscribing to FAN is only a concern/hindrane to 9% of this group.



This picture is generally similar amongst respondents with young children, regardless whether the parents were internet or non-internet users.



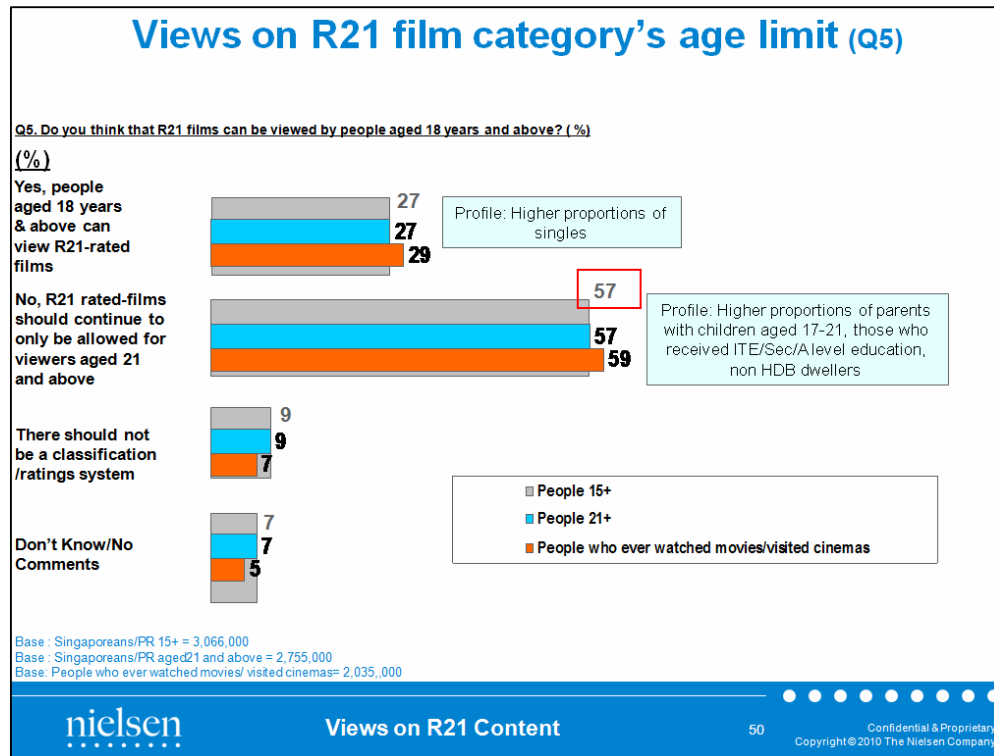
Views on R21 Content on Films, Videos/DVDs/VCDs, Video games and Subscription TV

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Views on the R21 film category's age limit• Views on censorship at the highest rating of R21• Acceptability of screening R21 films in HDB estates' cinemas• Views on R21 films being made available for sale as Videos/DVDs/VCDs• Views on having R21 rating for video games, subscription TV and Video-on-demand
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Views on the Age Limit for R21 Films

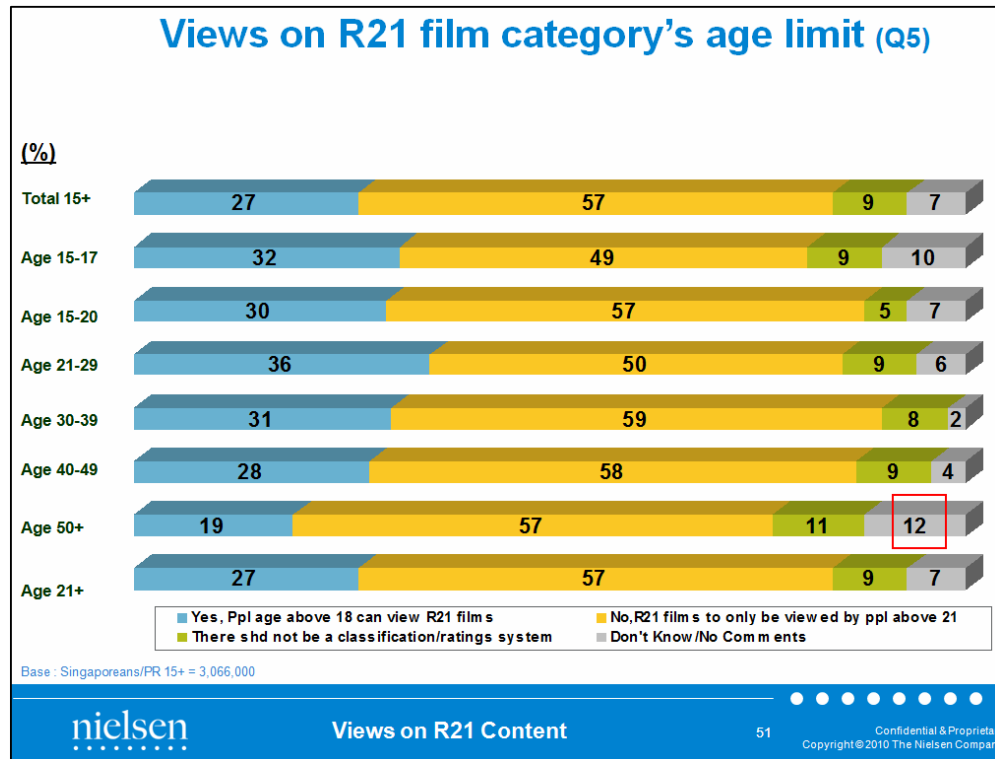
Close to 60% of respondents thought that R21 films should continue to only be allowed for viewers aged 21 and above.

A similar trend was noted amongst those aged above 21 as well as respondents who had ever watched movies.

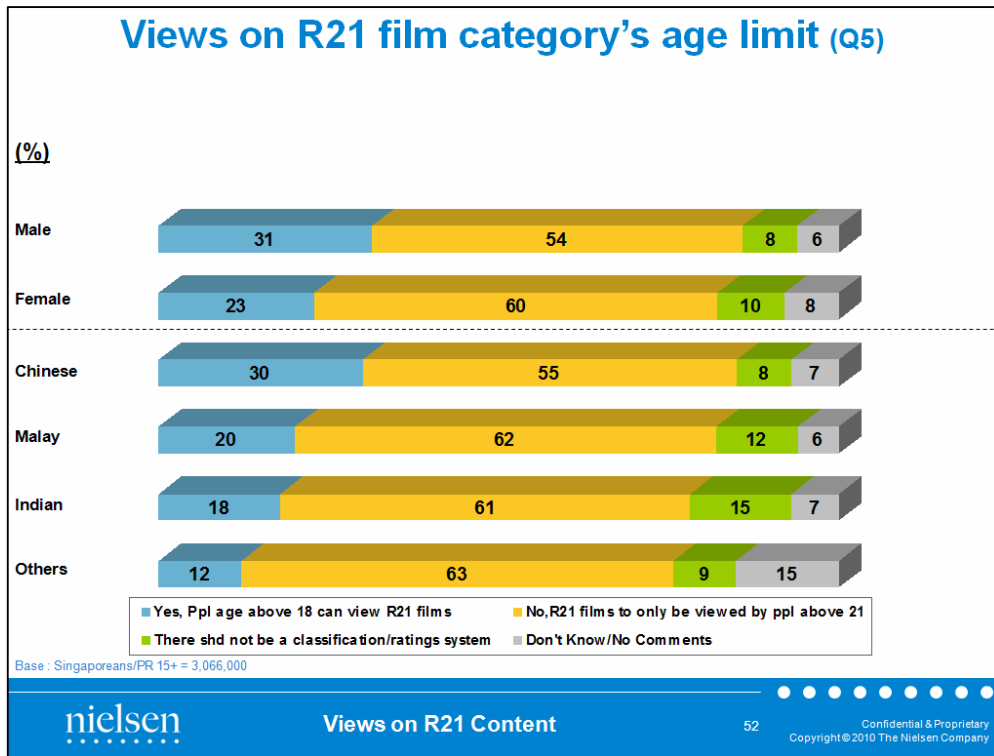


Across all demographics, half or more felt R21 films should only be viewed by those 21 and above. Within age groups, people aged 21 to 29 held split views on the age limit for R21 films.

On the other hand, a slightly bigger proportion in their 50s did not have an opinion on the age limit for R21 films.

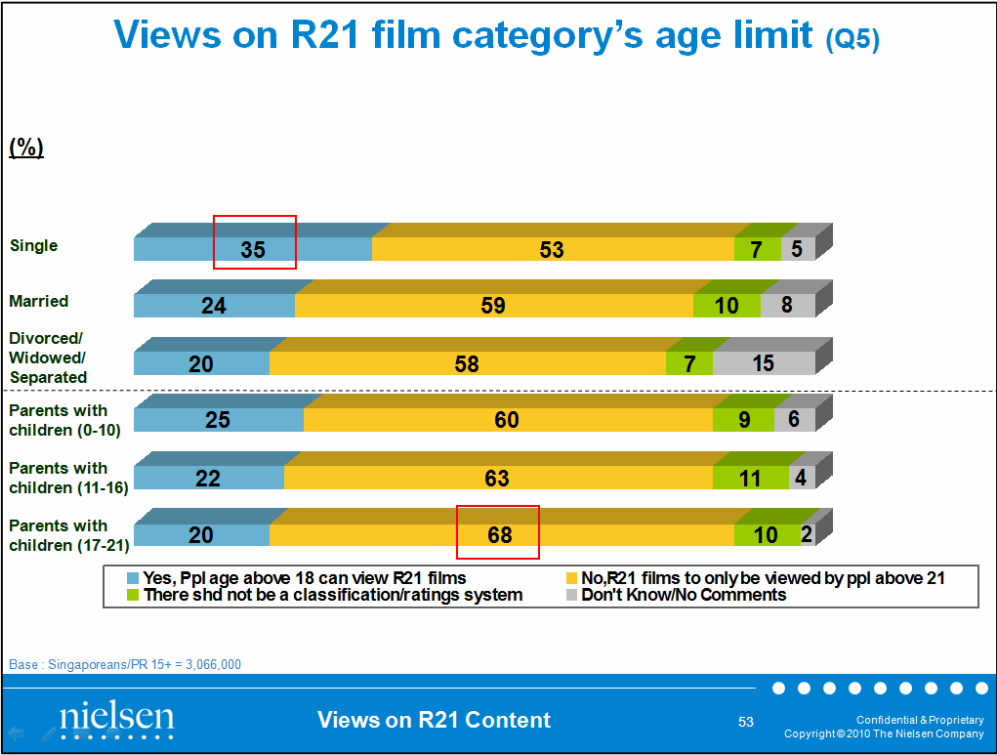


Across gender and race, at least 54% of respondents thought that R21 films should only be viewed by those aged above 21.



Compared to the other demographics, slightly higher proportion of singles felt that people aged above 18 could view R21 films.

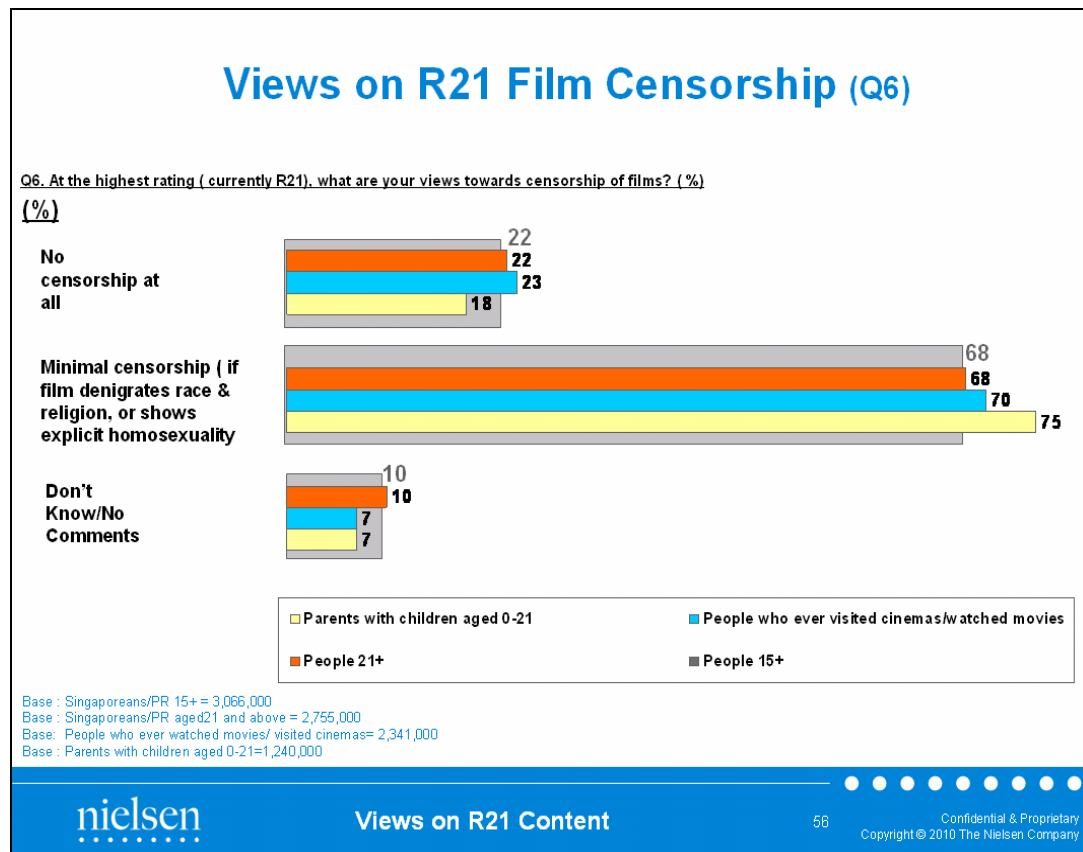
However, more among parents with children aged 17 to 21 years thought that R21 films could only be viewed by those aged above 21.



Views on Censorship at Highest Rating

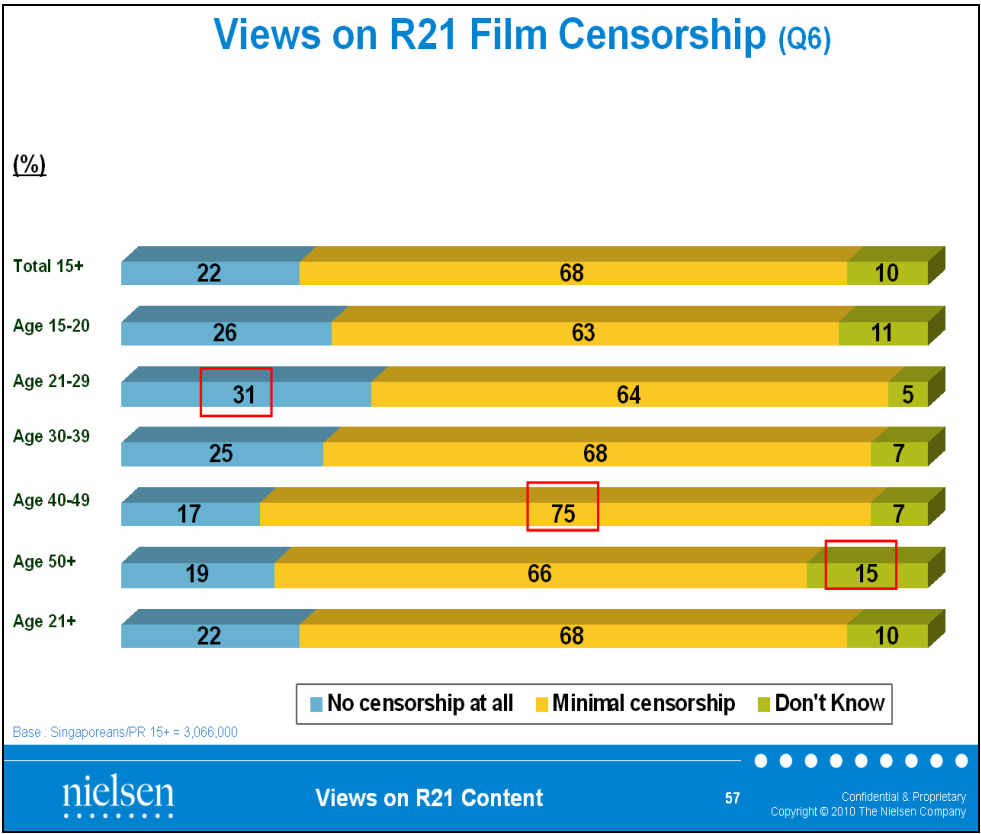
Close to 70% of respondents felt that there should be minimal censorship for R21 films.

A similar trend was noted amongst those aged above 21 years old as well as respondents who had ever watched movies, especially amongst parents with children aged 21 years and below (75%)

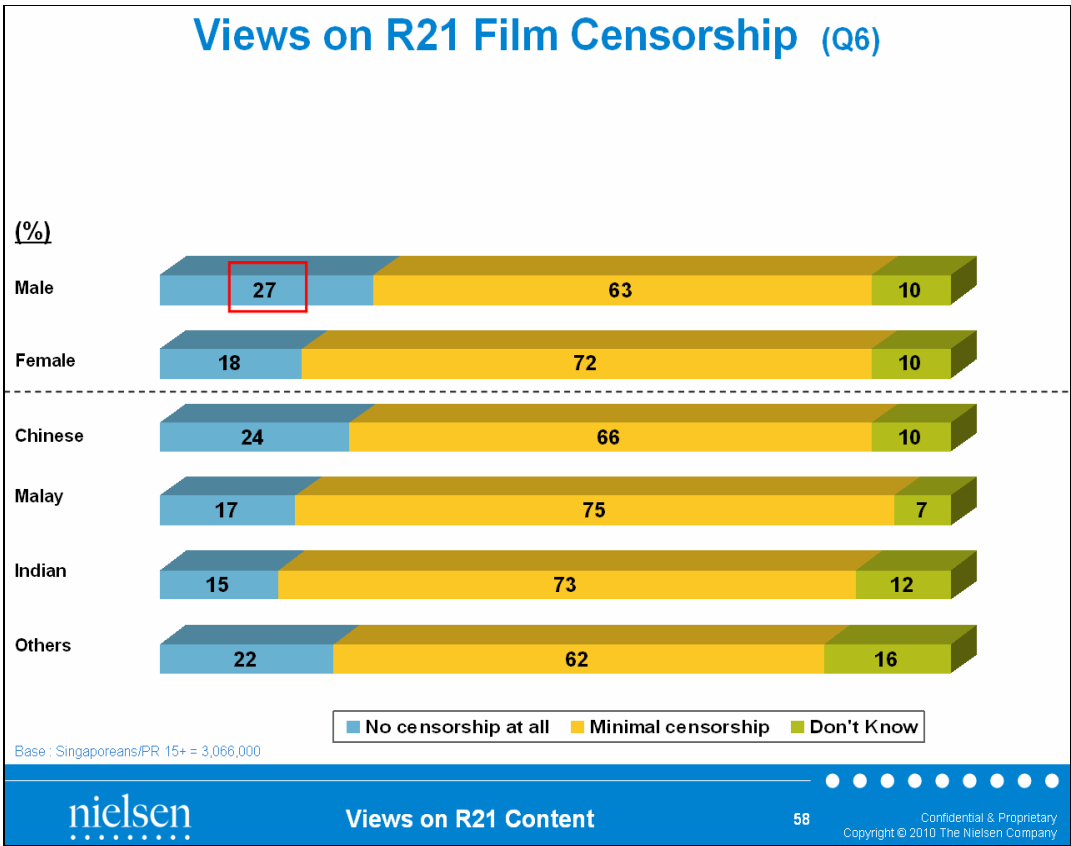


Across age groups, a higher proportion of respondents aged 21 -29 preferred no censorship at all in R21 films.

In contrast, older respondents aged 40 to 49 were more likely to prefer minimal censorship while those aged above 50 were more likely to have no opinion.

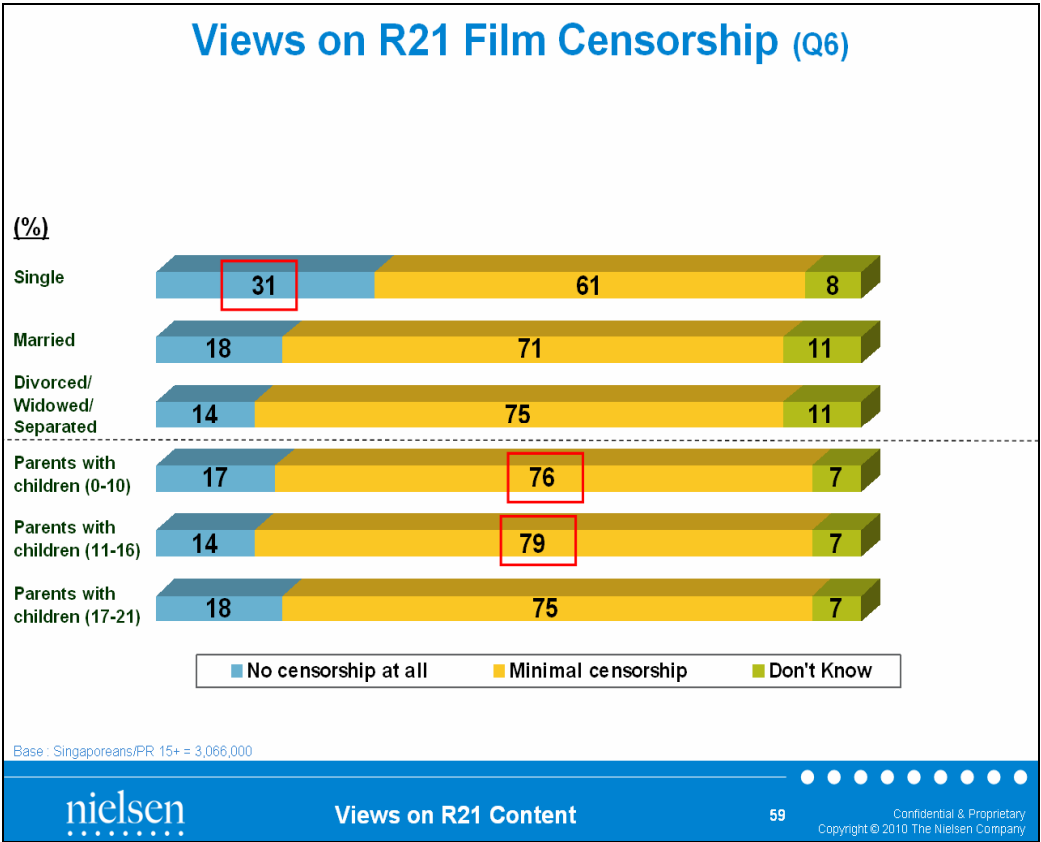


Across gender, higher proportion of males compared to females preferred to have no censorship in R21 films.



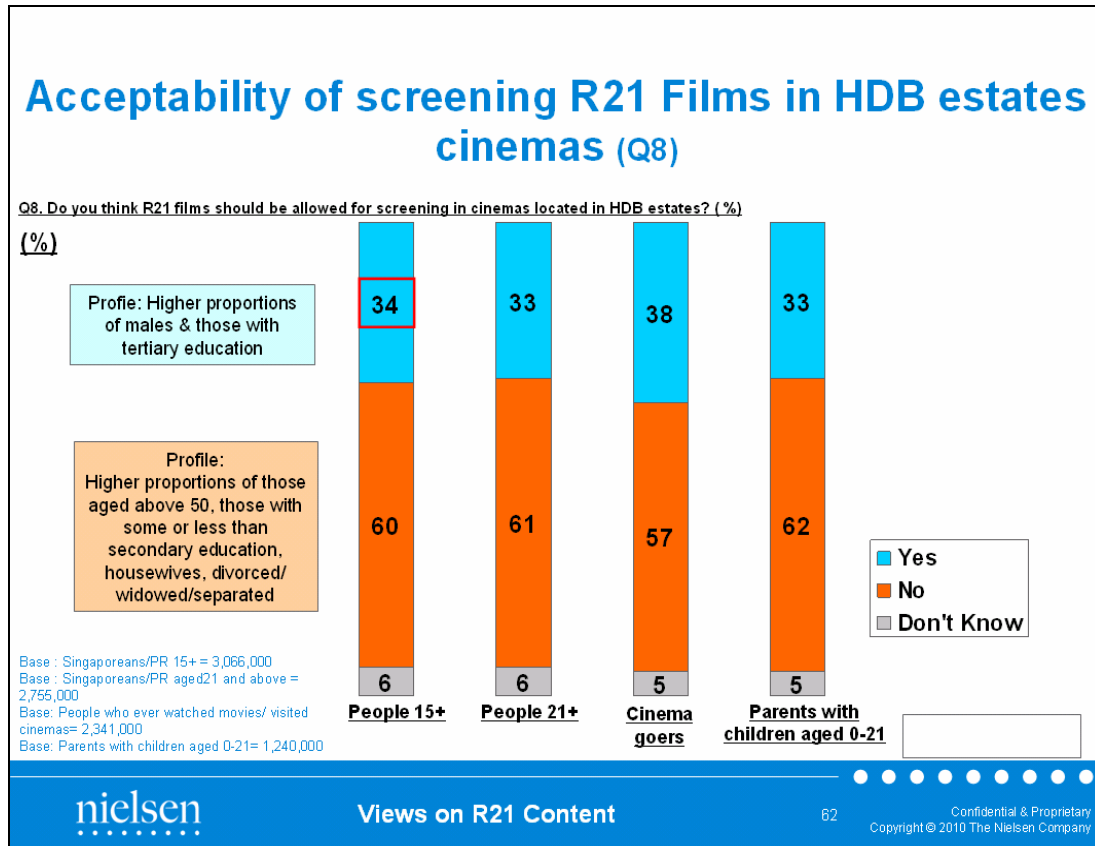
Singles compared to those married were more likely to prefer having no censorship in R21 films.

Parents with children aged 0 to16 years old were more likely to prefer minimal censorship in R21 films.



Views on Allowing R21 Films in HDB Estates

60% of respondents thought that R21 films should not be allowed for screening in cinemas located in HDB estates. However, 1 in 3 respondents thought otherwise.

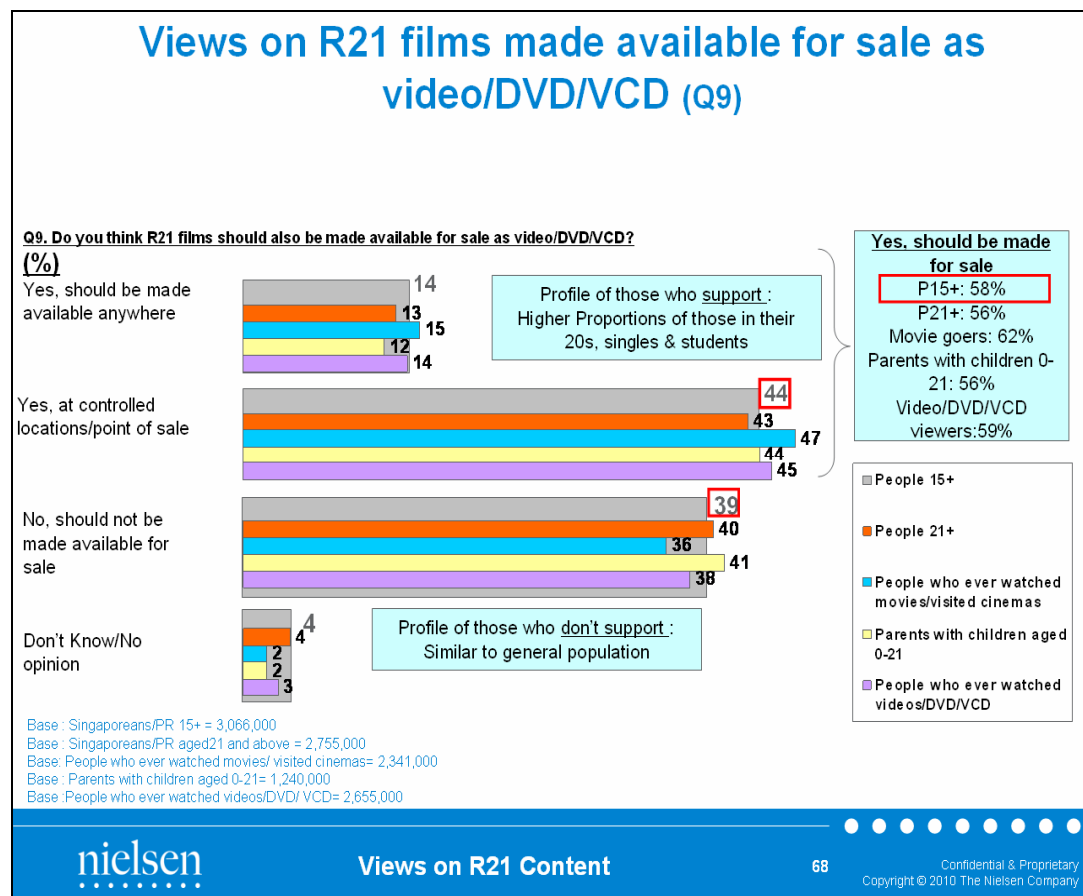


Views on Allowing R21 Content on Videos

Nearly 60% thought that R21 films should be made available for sale as Videos/DVDs/VCDs, with proportionately more preferring the sale to be made available at controlled locations/point of sale (44%) compared to being made available anywhere (14%)

However, there was also a big group of respondents (nearly 40%) who were against the sale of R21 films as Videos/DVDs/VCDs.

A similar trend was noted amongst those aged above 21, respondents who had ever watched movies, parents with children aged 0 to 21 years old as well as people who had ever viewed Videos/DVDs/VCDs.



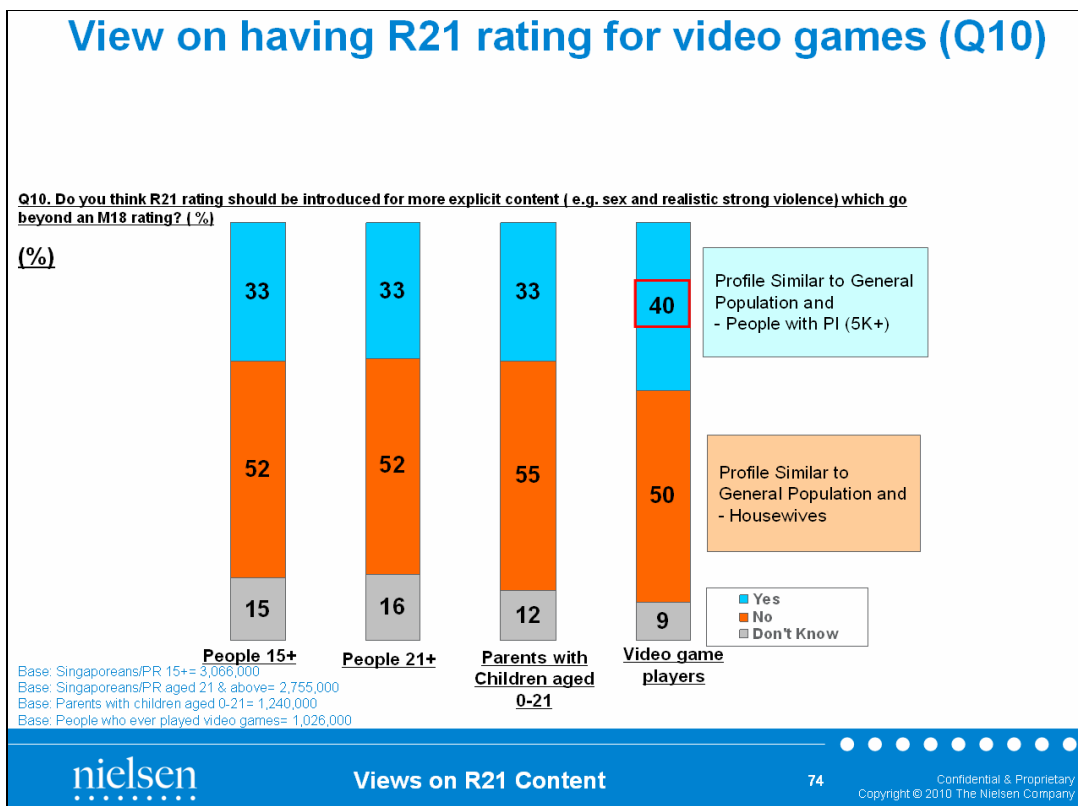
Views on Introducing R21 Rating to Video Games Classification

Half of respondents across all groups thought that the R21 rating should not be introduced for video games with more explicit content that went beyond the M18 rating.

However, 1 in 3 respondents across all groups thought otherwise and agreed that R21 rating for such content can be introduced.

A similar trend was noted amongst respondents aged above 21, parents with children aged 0 to 21 years old and people who ever played video games.

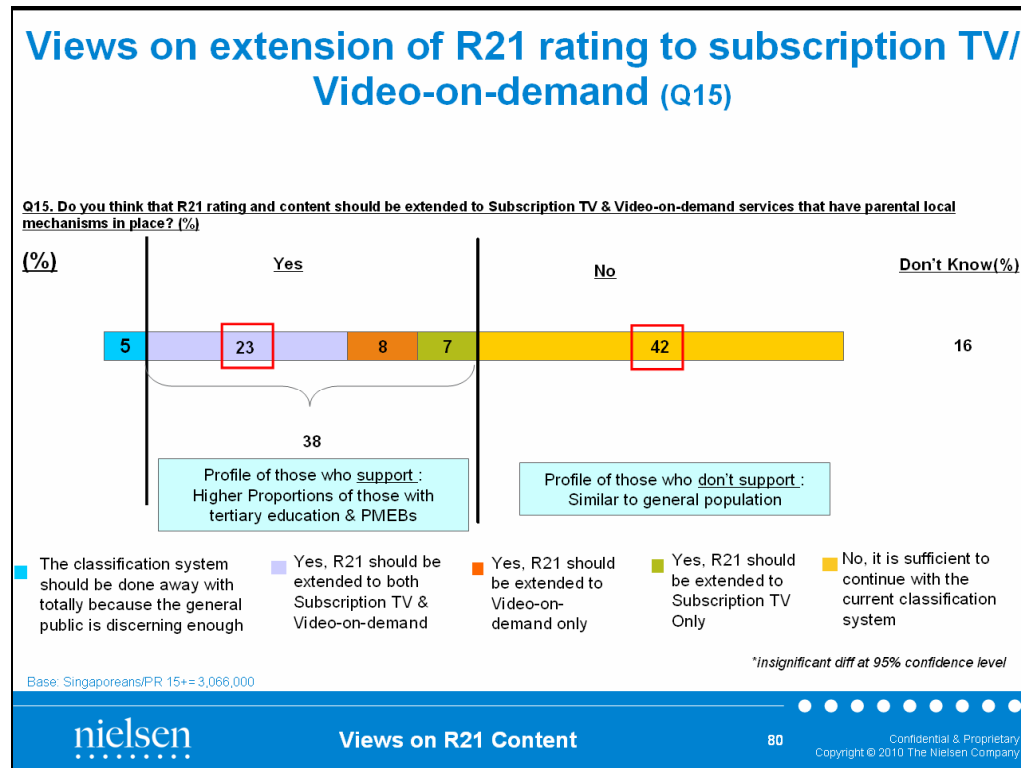
More video game players were agreeable to introducing R21 rating (40%) as compared to the other 3 groups of respondents (33%).



Views on Introducing R21 Content to Pay-TV

There were divided views on the issue of extending the R21 rating to subscription TV or VOD.

42% of respondents found it sufficient to continue with the current system, while 38% supported the extension of the R21 rating. Among those who supported the extension, majority were fine with extending it to both subscription TV and VOD.

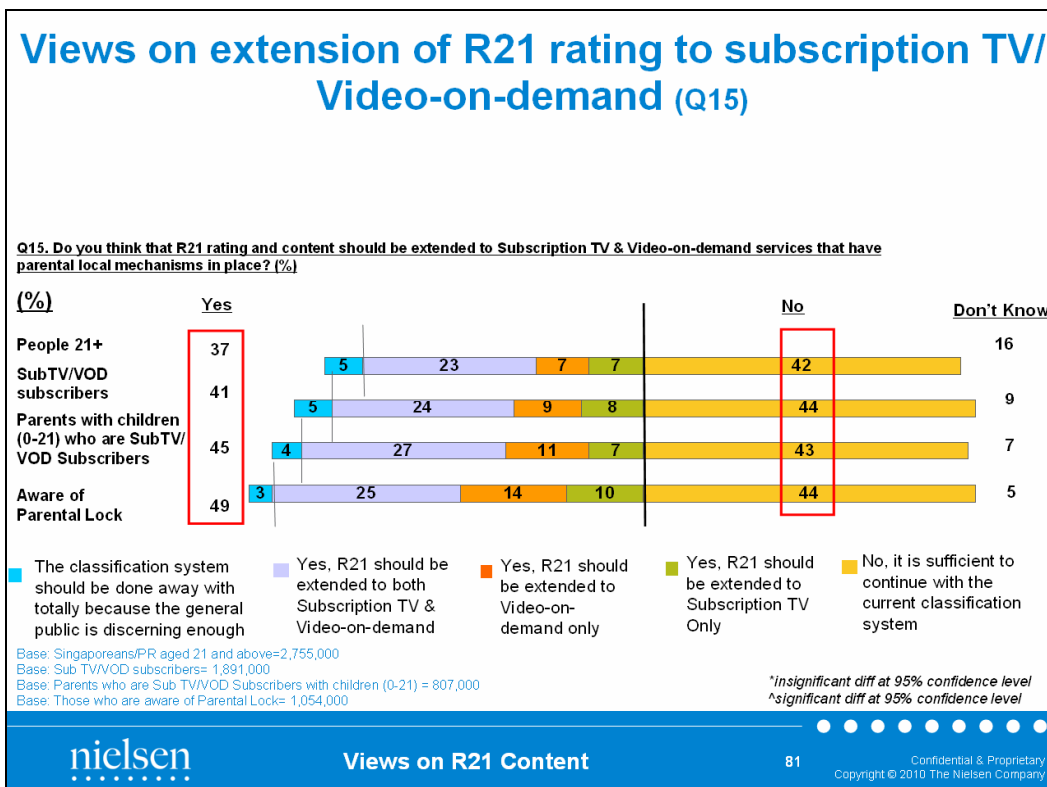


As compared to the general population, a similar trend was noted for respondents:

- aged above 21 years old,
- subscription TV or Video-on-demand subscribers,
- parents with children aged 0 to 21 years old and who were subscription TV/VOD subscribers
- Respondents who were aware of parental lock.

Views were divided on the issue of extending R21 rating to subscription TV/VOD.

As compared to the general population, there were proportionately more parents with children 21 years and below as well as those who were aware of the parental lock (49%), supporting the extension of the R21 rating to subscription TV or Video-on-demand.



Views on 100-site Ban and Downloading Content via Internet

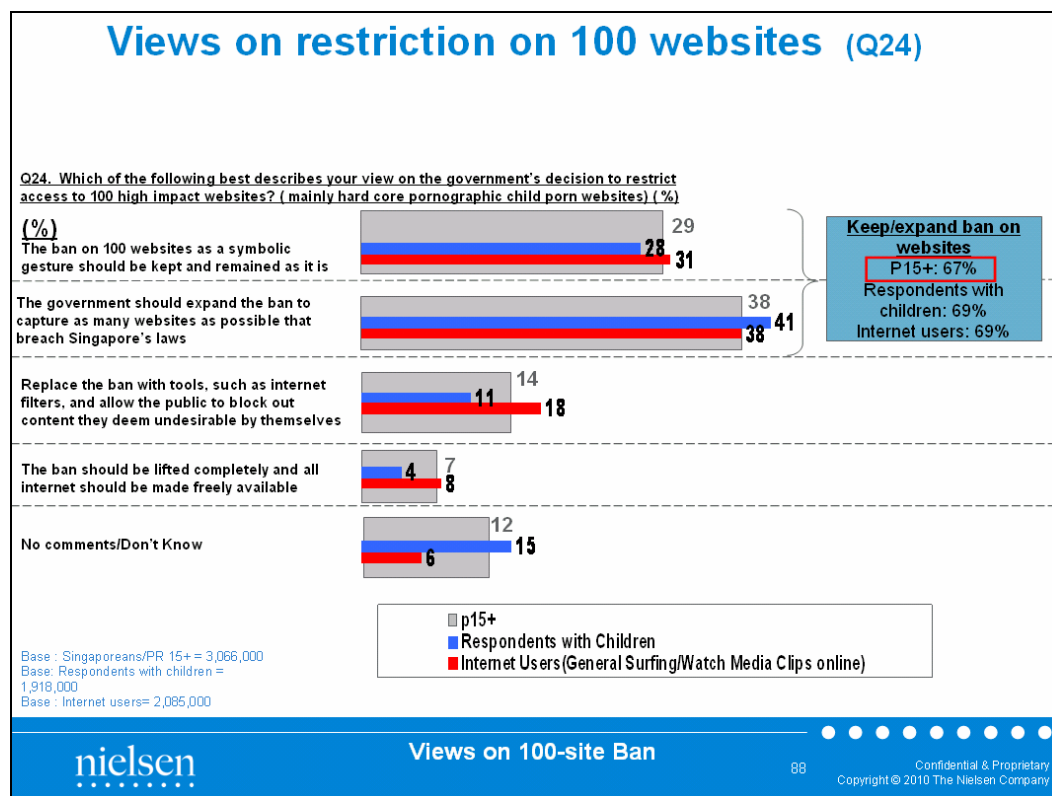
Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Views on restriction on 100 high impact websites• Views on downloading, keeping and viewing unclassified and obscene materials via the Internet• Views on possession of unclassified materials in Videos/DVDs/VCDs format
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Views on 100-site Ban

2 in 3 (67%) respondents thought that the government should keep or expand the ban on high impact websites, with proportionately more opting for a ban expansion (38%) than those opting to keep the ban on the 100 websites (29%).

A similar trend was noted amongst respondents who have children and respondents who had ever surfed or watched media clips online.

Comparatively, a higher proportion of respondents who had ever surfed or watched media clips online (18%) were more likely to opt for the replacement of the ban with tools like internet filters, than the general population or respondents who have children.

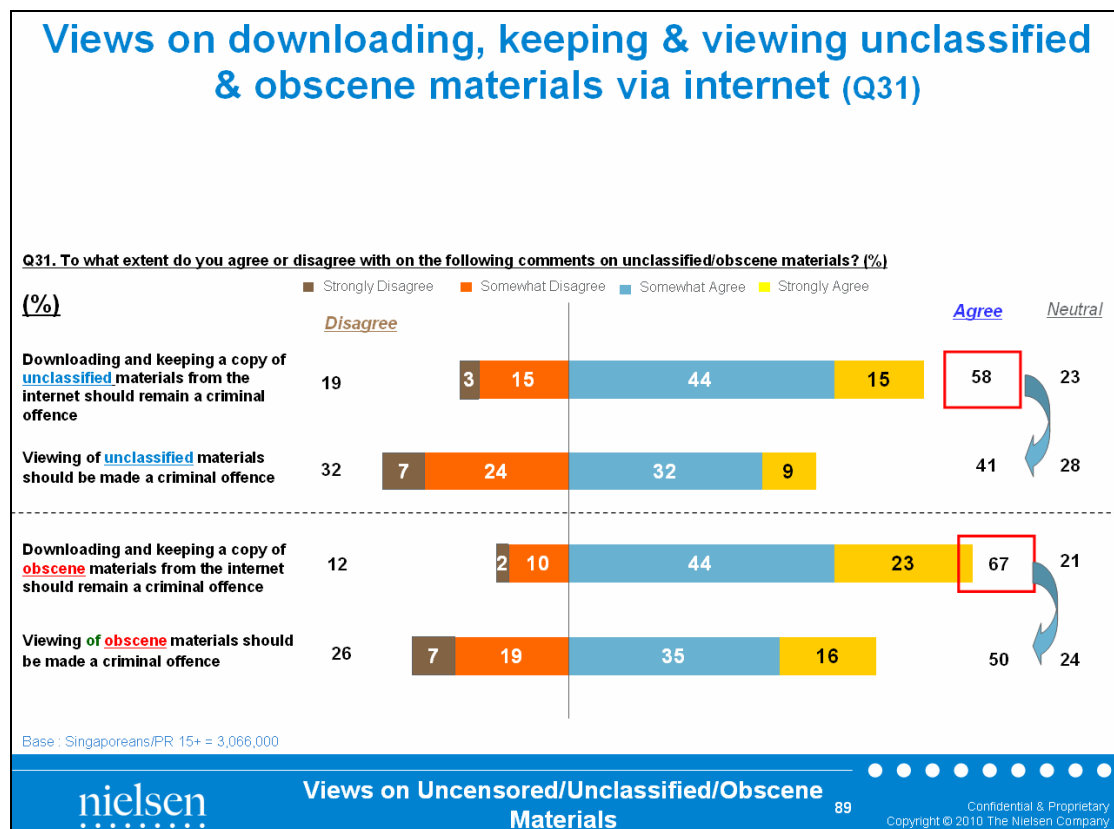


Views on Downloading and Possessing of Content via the Internet

Majority of respondents felt that downloading and keeping copies of unclassified (58%) or obscene (67%) materials should remain a criminal offence.

With regard to the action of downloading and keeping or viewing obscene or unclassified materials, more respondents were against downloading and keeping copies of such materials (unclassified: 58%, obscene: 67%) as compared to viewing such materials (unclassified: 41%; obscene: 50%).

Regardless of the actions undertaken, more were against obscene materials (downloading: 67%, viewing: 50%) as compared to unclassified materials (downloading: 58%, viewing: 41%).



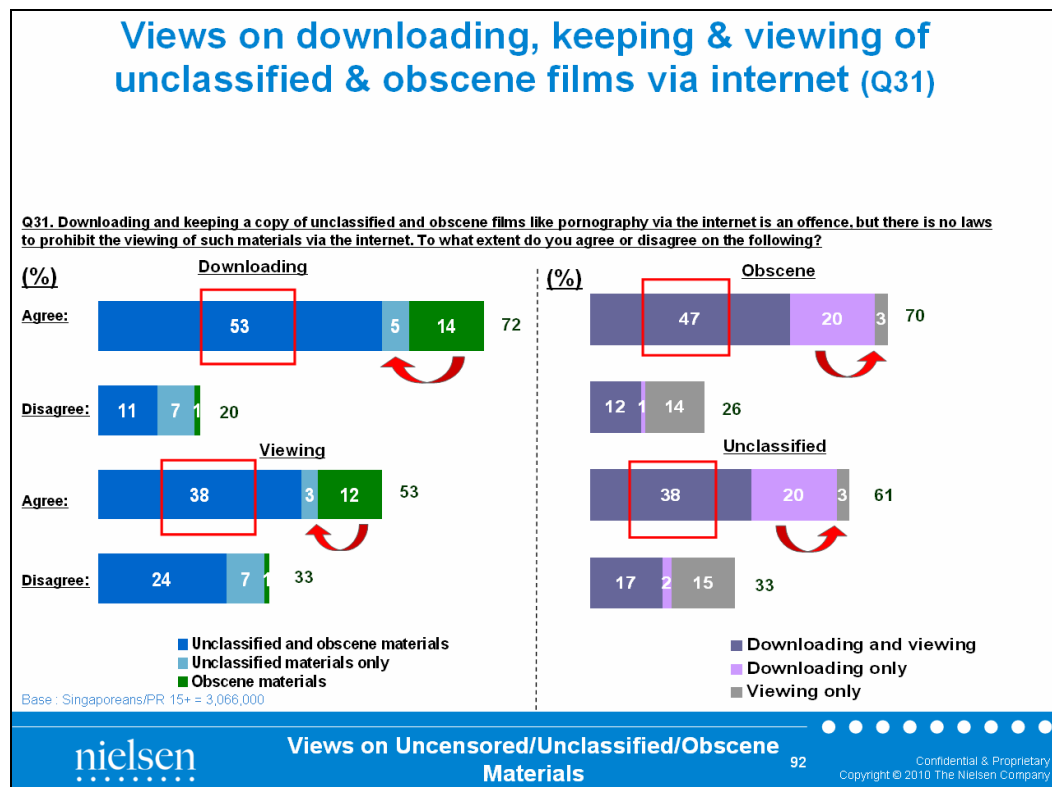
With regards to the actions undertaken on materials via the Internet:

Most respondents agreed that it is a criminal offence to downloading/keeping (53%) and viewing (38%), both unclassified and obscene materials.

With regards to the materials being accessed via Internet:

Almost half (47%) felt that downloading or viewing obscene materials should be made a criminal offence as compared downloading or viewing unclassified materials (38%)

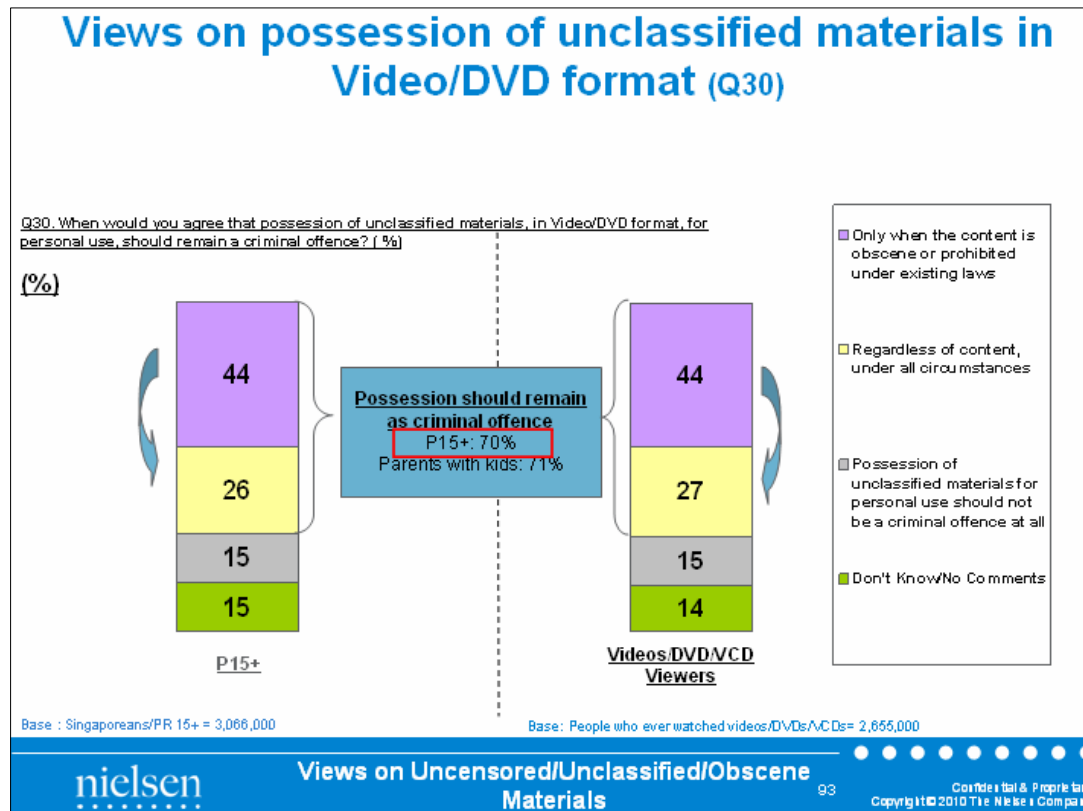
More respondents were against the action of only downloading the materials as compared to only viewing the materials.



Views on Possession of Unclassified Materials on Videos/DVDs/VCDs

70% of respondents agreed that the possession of unclassified materials in Videos/DVDs/VCDs format should remain a criminal offence, with proportionately more agreeing only when the content was considered obscene or prohibited under existing laws(44%).

A similar trend was noted amongst people who had ever viewed Videos/DVDs/VCDs as well.



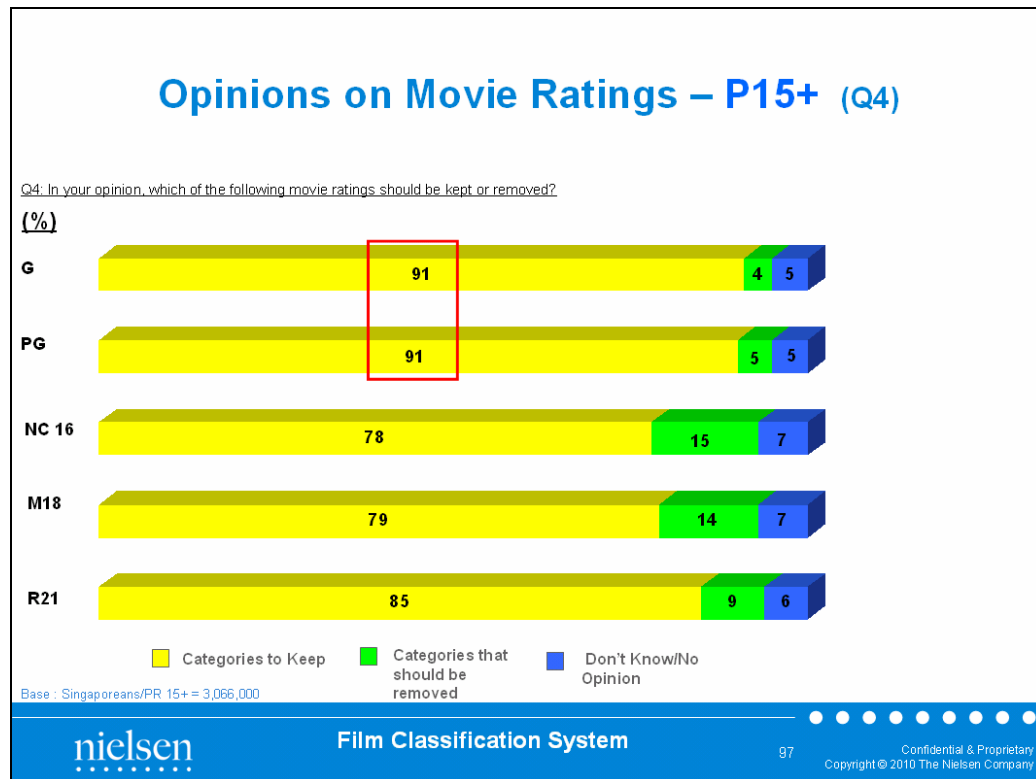
Film Classification System

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Opinions of the general population and movie goers on movie ratings• Opinions on movie rating categories to be kept• Opinions on introduction of a new PG13 rating
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Perception of Film Classification System – General

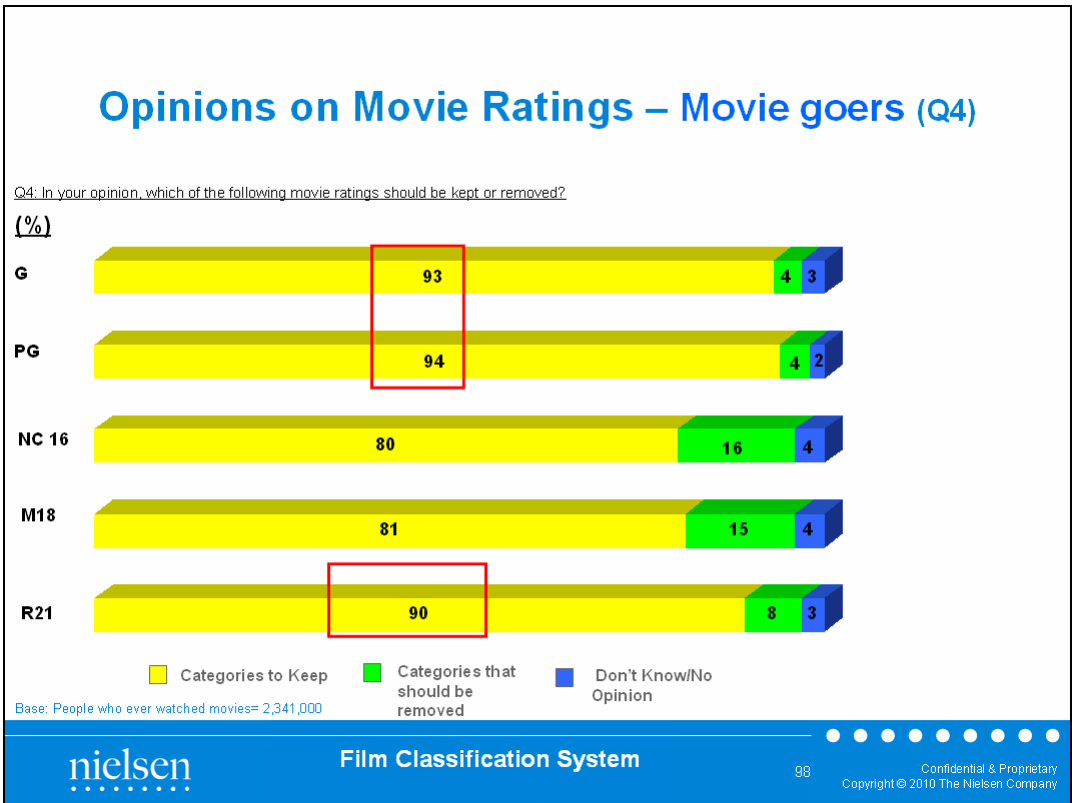
In terms of movie ratings, at least 78% respondents felt that all current movie ratings should be retained.

9 in 10 respondents were in favour of retaining G and PG ratings. R21 rating had 85% respondents in favour of retaining it and close to 80% supported retaining the NC16 and M18 ratings.



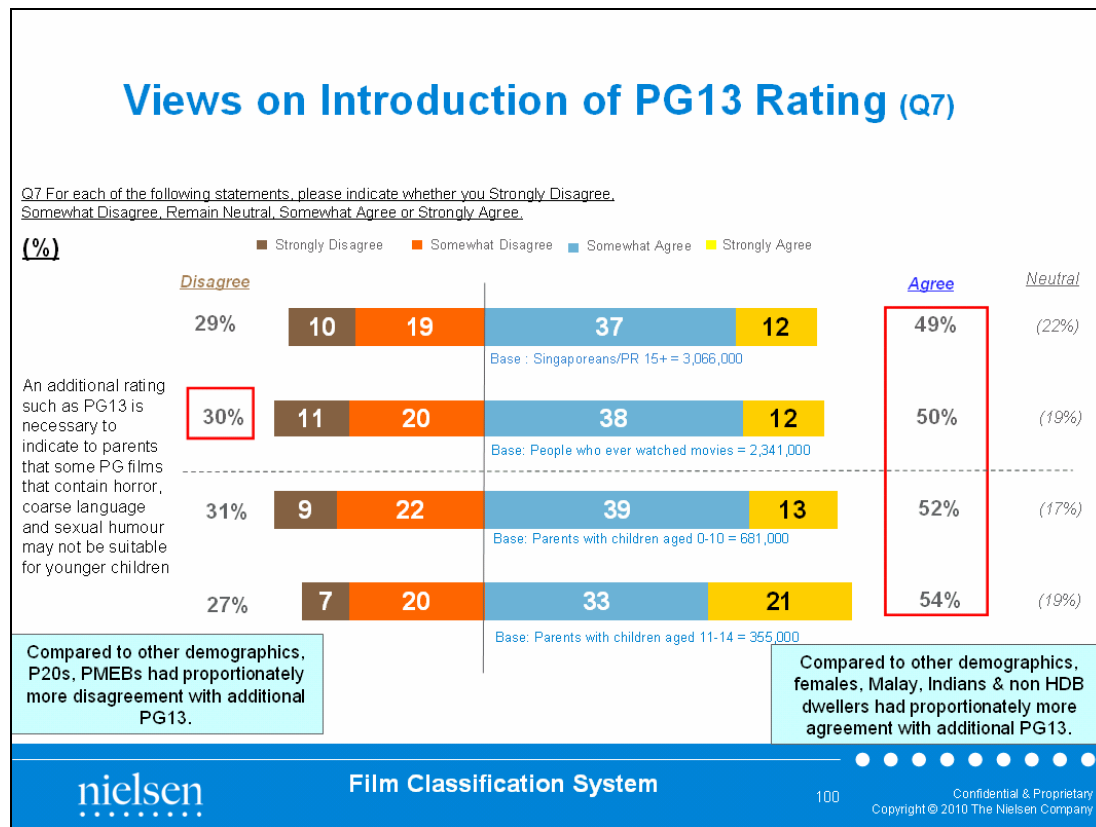
Perception of the Film Classification System – Movie Goers

Similar to the general population, at least 80% of movie goers felt that all categories should be retained with at least 90% in favour of retaining G, PG and R21 rating.

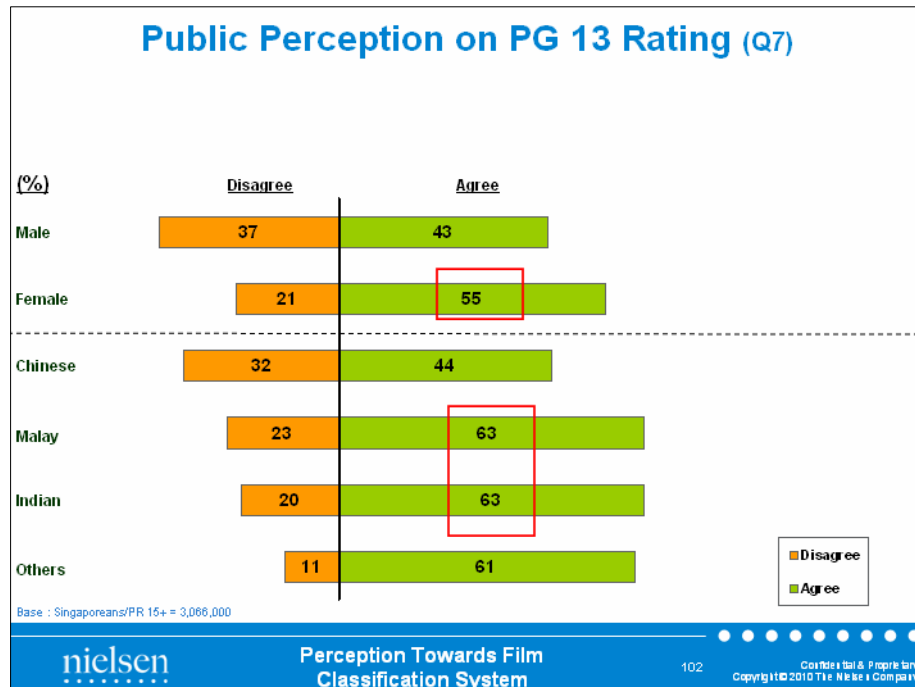


Views on the Introduction of PG13 Rating

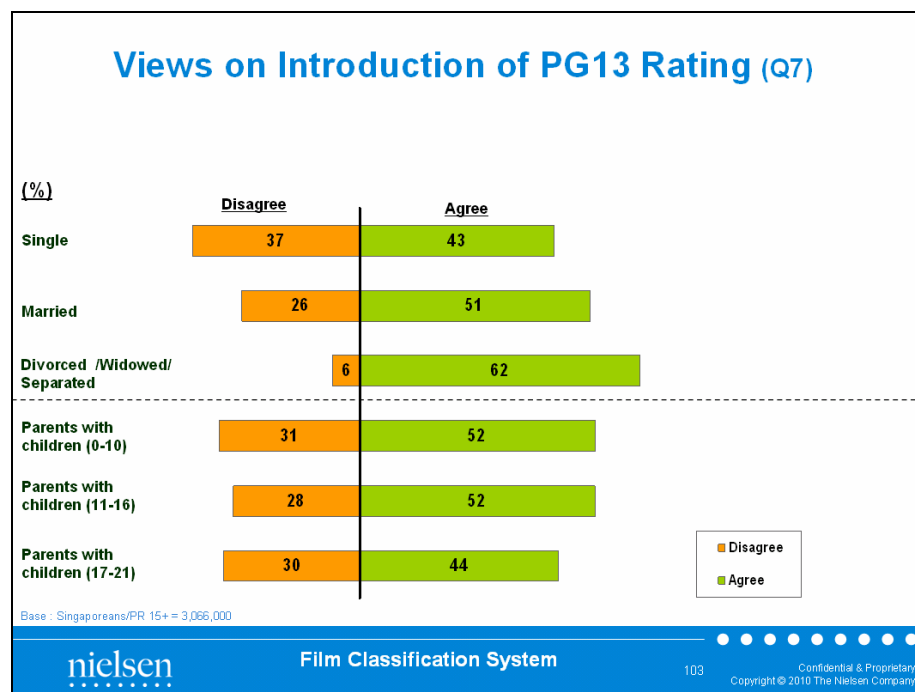
About half of the general population were in favour of an additional PG13 to indicate the presence of elements such as horror, coarse language and sexual humour which might not be suitable for younger children. Similar views were held by movie goers and parents with children less than 14 years old.



Females, Malays and Indians were more likely to agree on having an additional PG 13 rating. Males held divided views on having an additional PG 13 rating.



Singles held divided views on having an additional PG 13 rating.



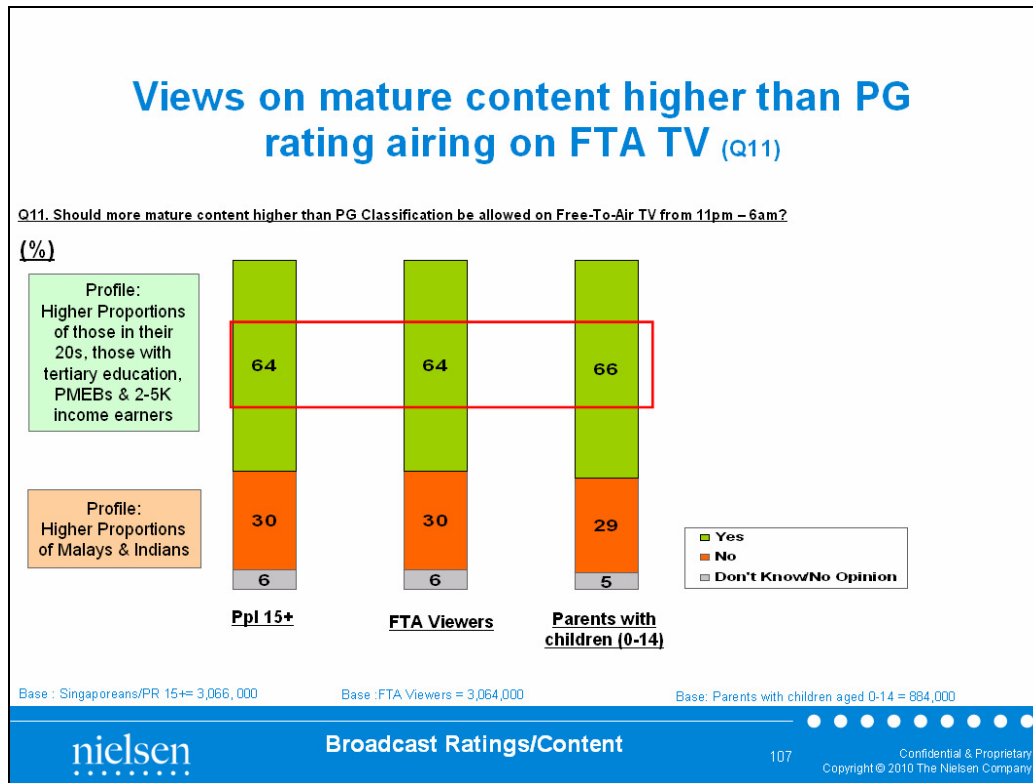
Broadcast Content and Ratings

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Views on mature content (higher than the PG 13 rating) airing on FTA TV• Views of harmonising ratings for subscription TV/Video-on-demand and films/Videos/DVDs
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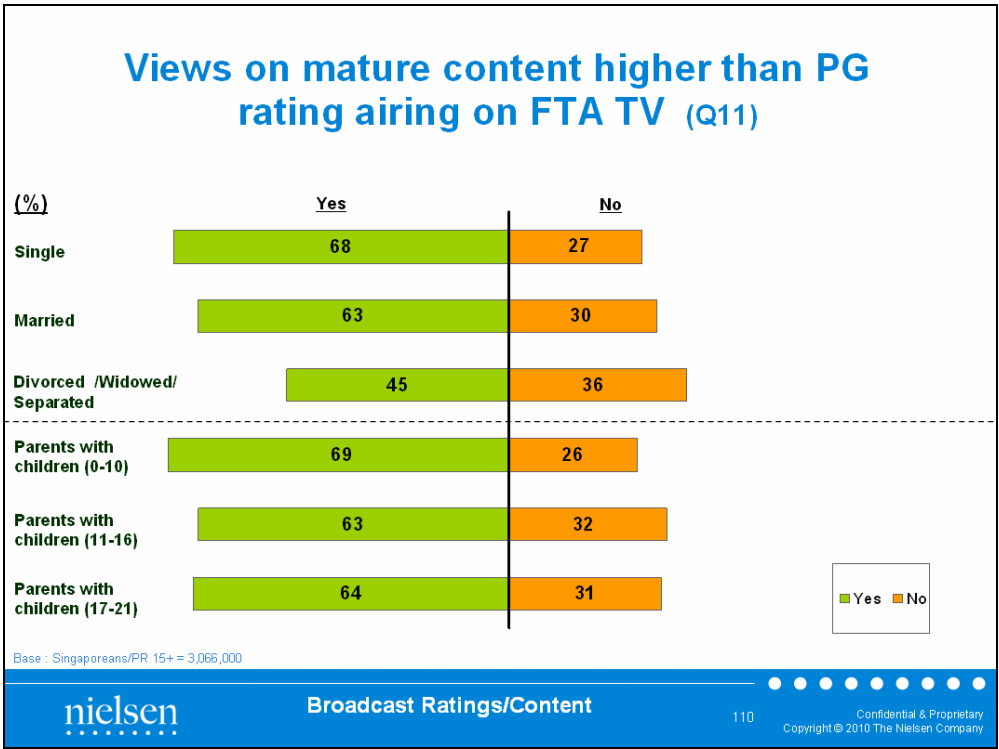
Views on Introducing More Mature Content on FTA TV

64% of respondents agreed that more mature content higher than PG classification could be allowed on FTA TV from 11pm – 6am.

FTA viewers (64%) and parents with children aged 0-14 (66%) shared similar views.



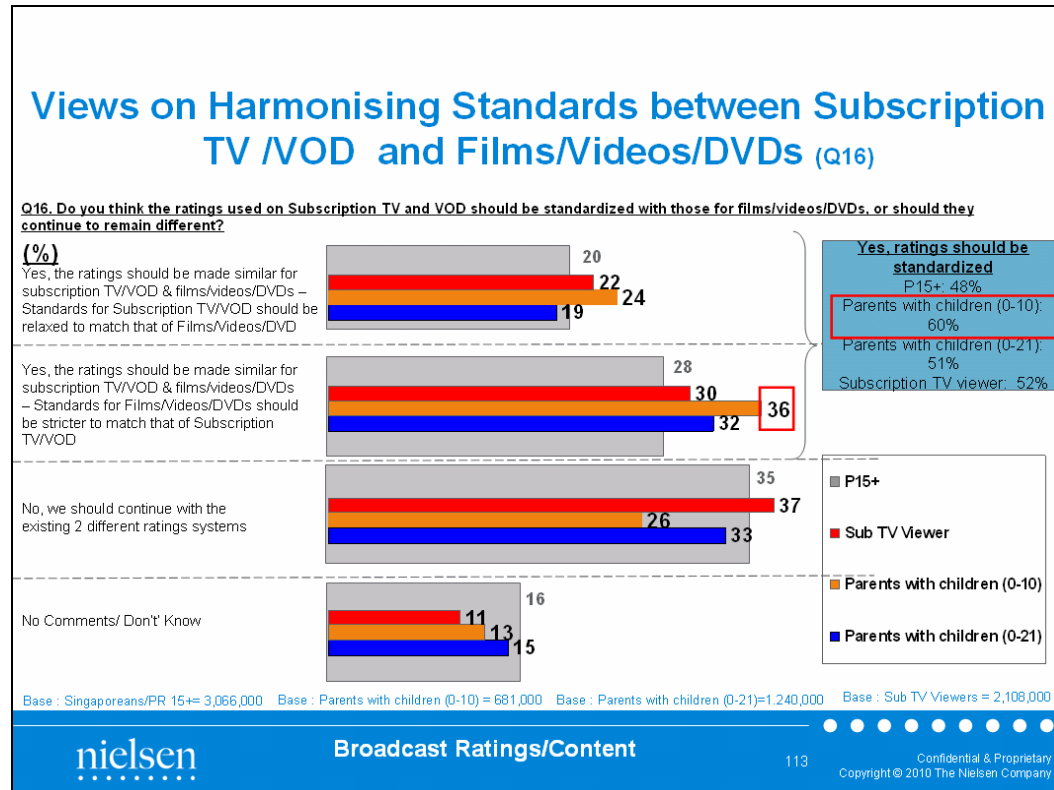
Regardless of marital status and parenthood status, generally more than 60% can accept more mature content, higher than PG rating airing on FTA TV from 11pm to 6am



Views on Harmonising Content Standards

Close to half of the general population felt that ratings for subscription TV and VOD should be standardized with those for films/videos/DVDs. Similar view was held by parents, especially those with young children under 10 (60%)

Parents with children aged under 10 (36%) were more likely than the general population to be in favour of making standards for films/videos/DVDs stricter to match subscription TV.



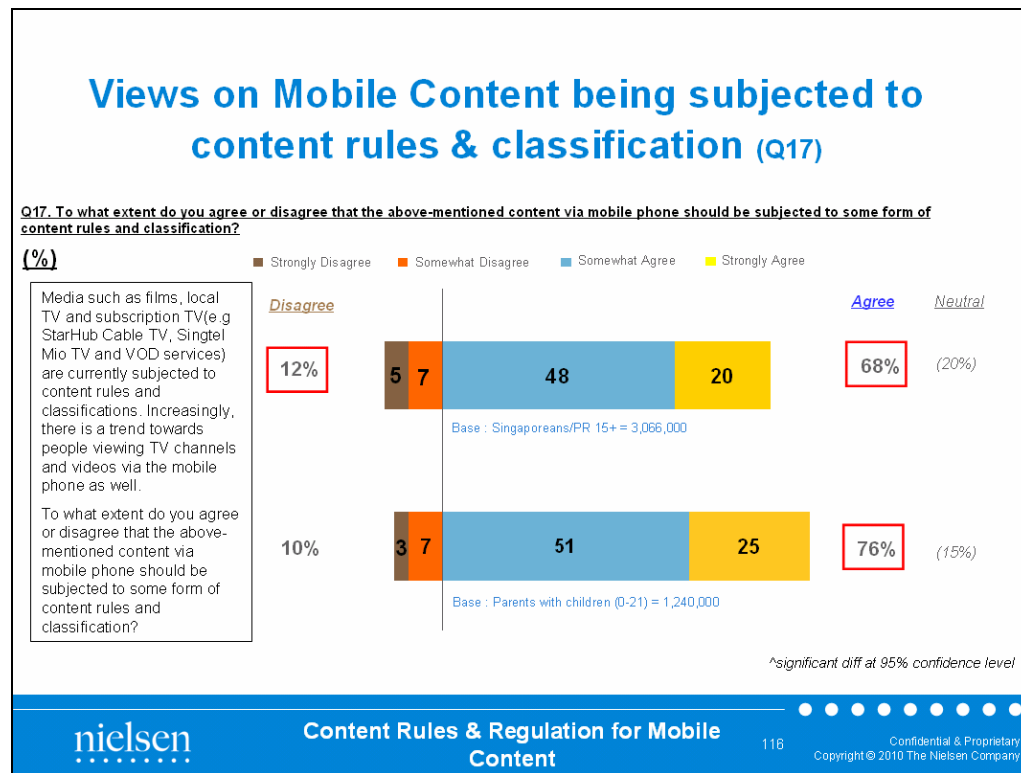
Content Rules and Regulation for Mobile Content

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Views on mobile content being subjected to content rules and classification
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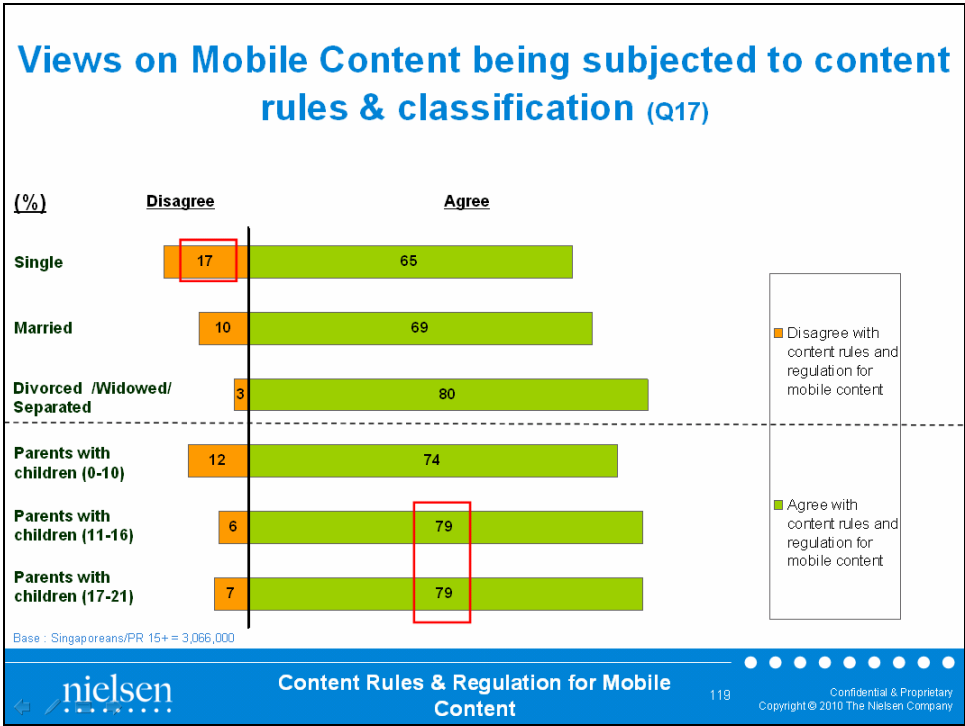
Content Rules and Regulation for Mobile Content

68% of respondents thought that mobile content should be subjected to some form of content rules and regulation with only disagreement from 12%

A similar trend was noted for parents with children aged 0 to 21, though they displayed higher agreement levels (76%) as compared to the general population.



Parents with children aged 11 to 21 were more likely to agree that mobile content should be subjected to some form of content rules and regulation.



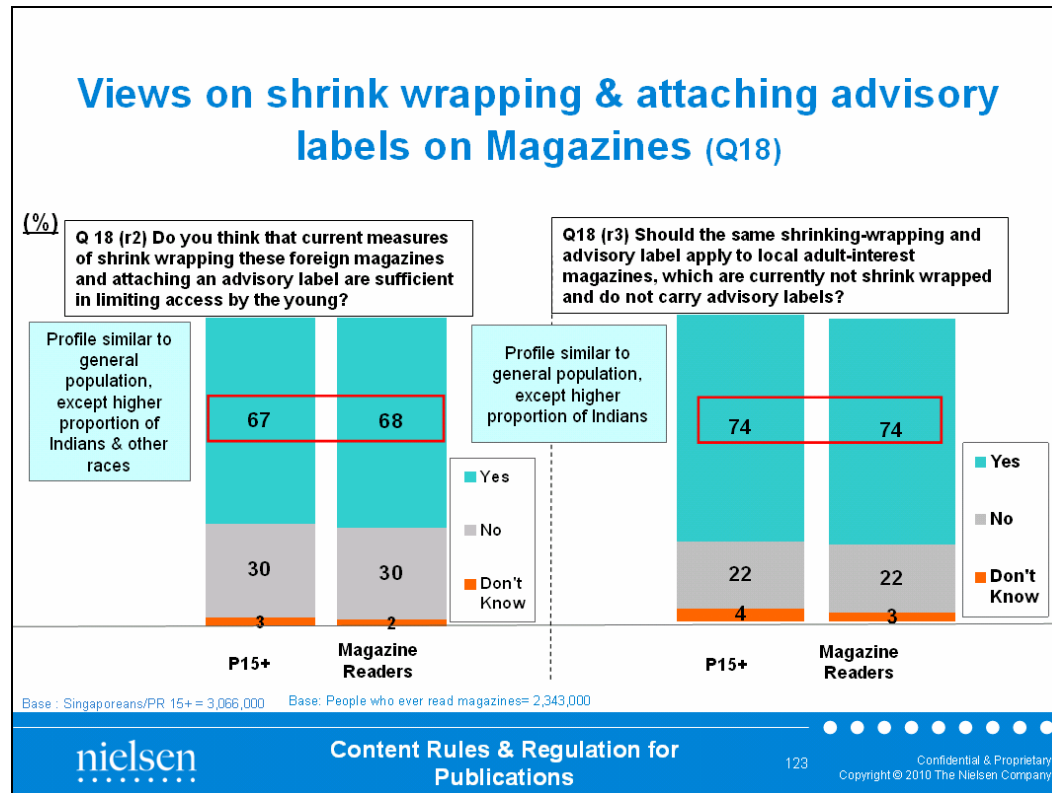
Content Rules and Regulations for Publications

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Views on shrink wrapping and attaching advisory labels on magazines• Views on applying the same content standards for local and foreign magazines• Views on magazines such as Playboy• Views on magazines such as Playboy amongst those that accepted magazines such as Playboy in Singapore
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Views on Access-Control Measures – Shrink Wrapping & Advisory

2 in 3 of the general population and magazine readers felt that current measures of shrink wrapping adult-interest foreign magazines and attaching advisory labels were sufficient in limiting access by the young.

3 in 4 (74%) of the general population and magazine readers felt that local adult-interest magazines should also be shrink-wrapped with advisory labels attached.

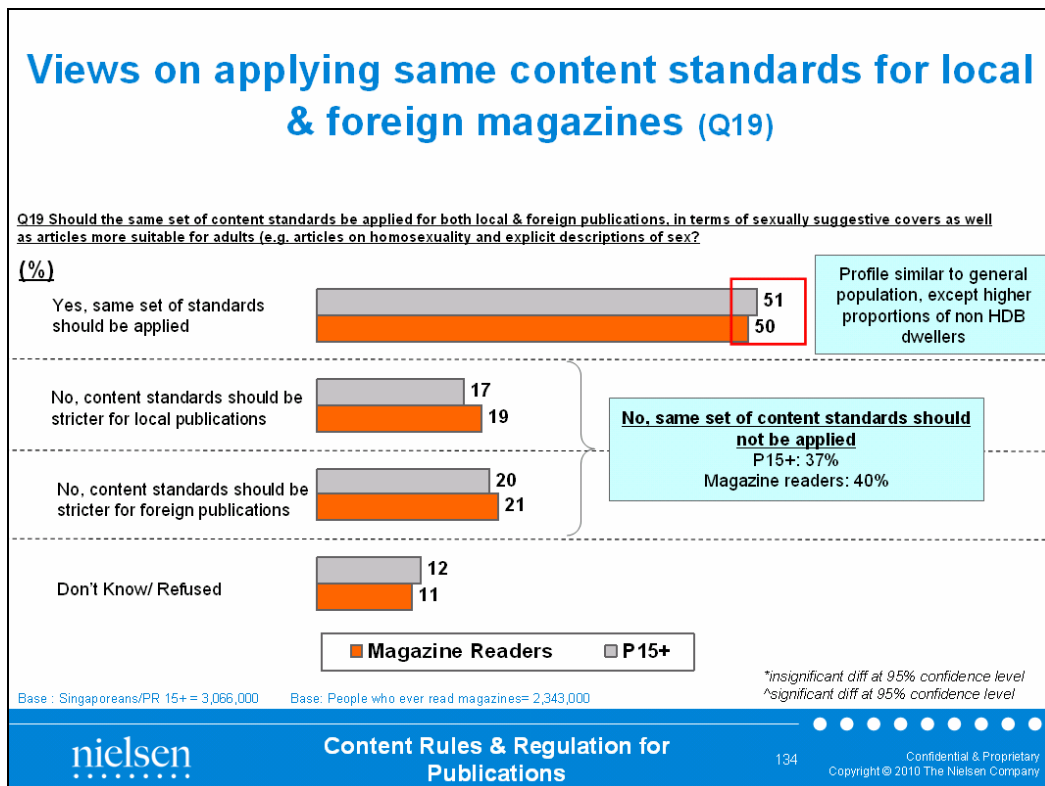


Views on Content Standards for Local and Foreign Publications

Half of the general population thought that the same set of content standards should be applied for both local and foreign publications.

While there was a sizable group of respondents who were against applying the same content standards (37%), there were divided views on whether content standards should be stricter for local or foreign publications.

A similar trend was noted amongst magazine readers.



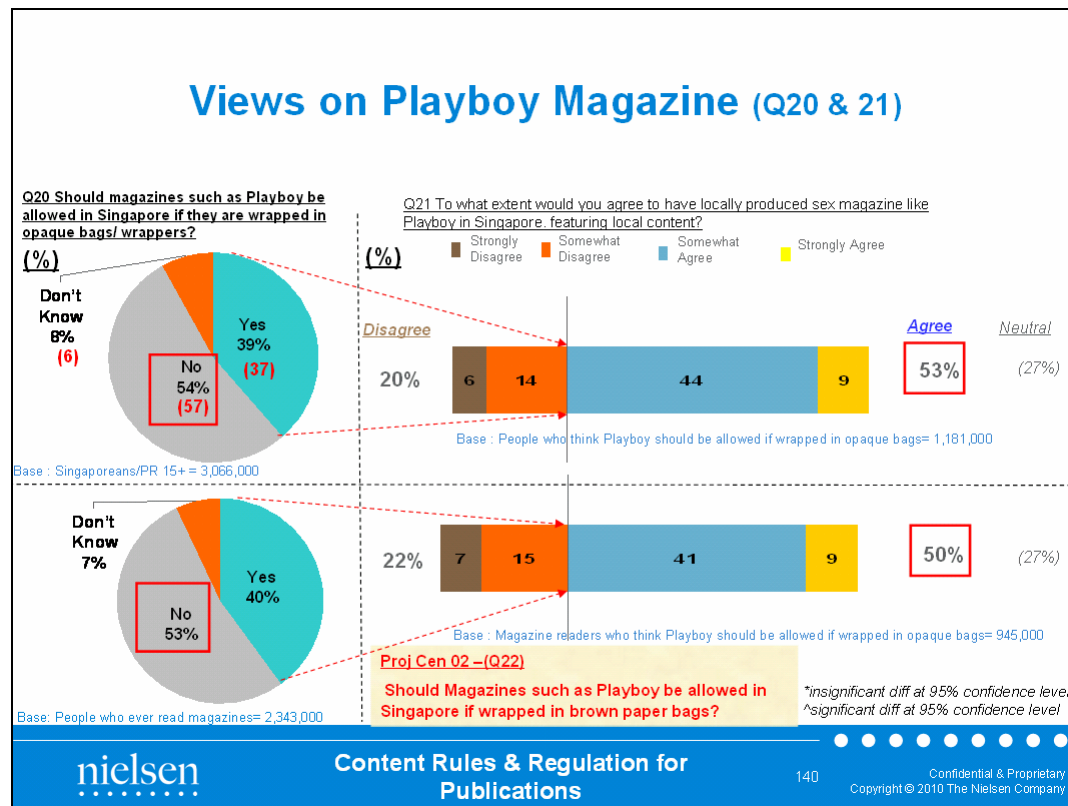
Views on *Playboy* Magazine

Half of the general population (54%) thought that *Playboy* magazine should not be allowed in Singapore even if they were wrapped in opaque bags. However, about 40% thought otherwise.

Amongst those who supported allowing *Playboy* magazine in Singapore, 53% would accept locally produced sex magazines like *Playboy* in Singapore.

Magazine readers shared the same sentiments as the general population.

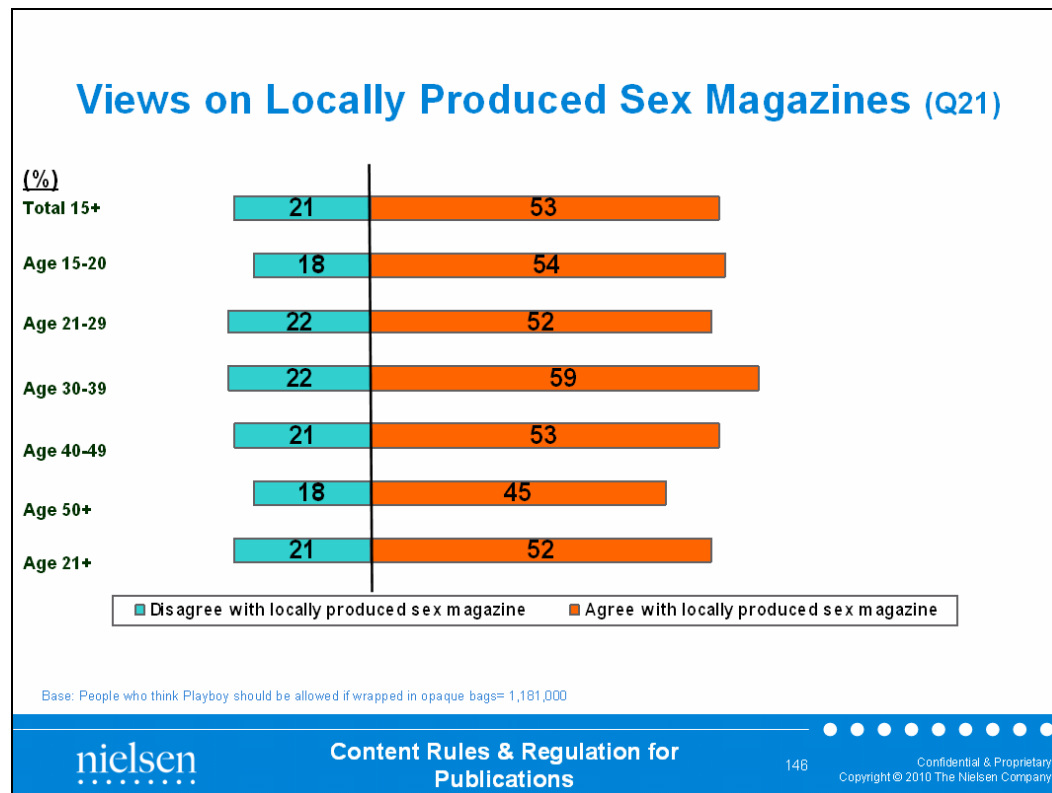
As compared to 2002, there was similar trend.



Views on Locally Produced Sex Magazine

Amongst the respondents who thought that *Playboy* should be allowed in Singapore if wrapped in opaque bags:

At least 52% of these respondents across most age groups (except those aged above 50) would accept locally produced sex magazines like *Playboy* in Singapore.



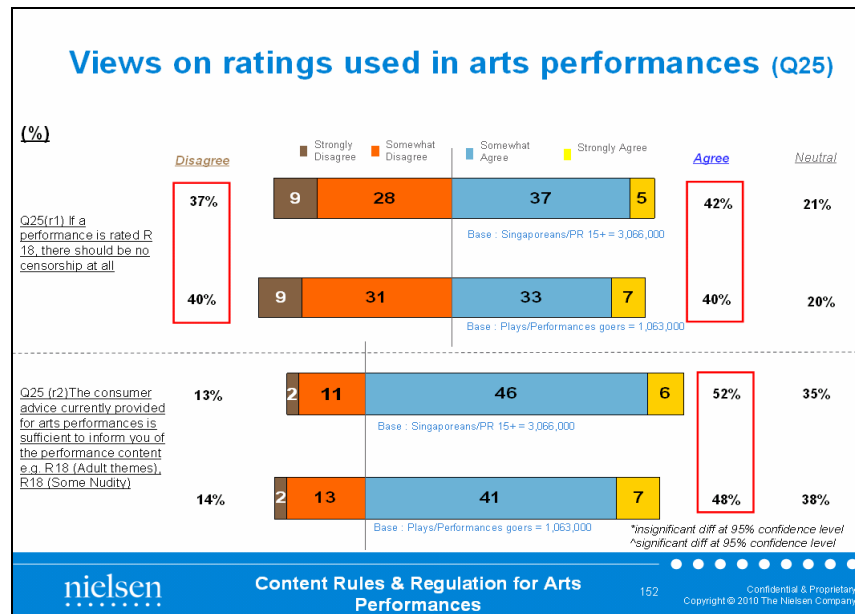
Content Rules and Regulation for Arts Performances

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Views on ratings used in arts performances• Views on homosexual content in arts performances
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Content Rules and Regulation for Arts Performances

The general population and respondents who had ever attended plays or drama performances held divided views on having censorship for R18 rated performances.

Half of the general population and respondents who had ever attended plays or drama performances agreed that the current consumer advice provided for arts performances was sufficient on providing information on performance content.



Views on ratings used in arts performances (Q25)

Question	Profile amongst play/performance goers
Q25(r1) If a performance is rated R 18, there should be no censorship at all	<p>Agree</p> <ul style="list-style-type: none"> - Similar to general population <p>Disagree</p> <ul style="list-style-type: none"> - Parents with children aged 0-18
Q25 (r2) The consumer advice currently provided for arts performances is sufficient to inform you of the performance content e.g. R18 (Adult themes), R18 (Some Nudity)	<p>Agree</p> <ul style="list-style-type: none"> - People aged 21-29 - Indian, other races <p>Disagree</p> <ul style="list-style-type: none"> - Similar to general population

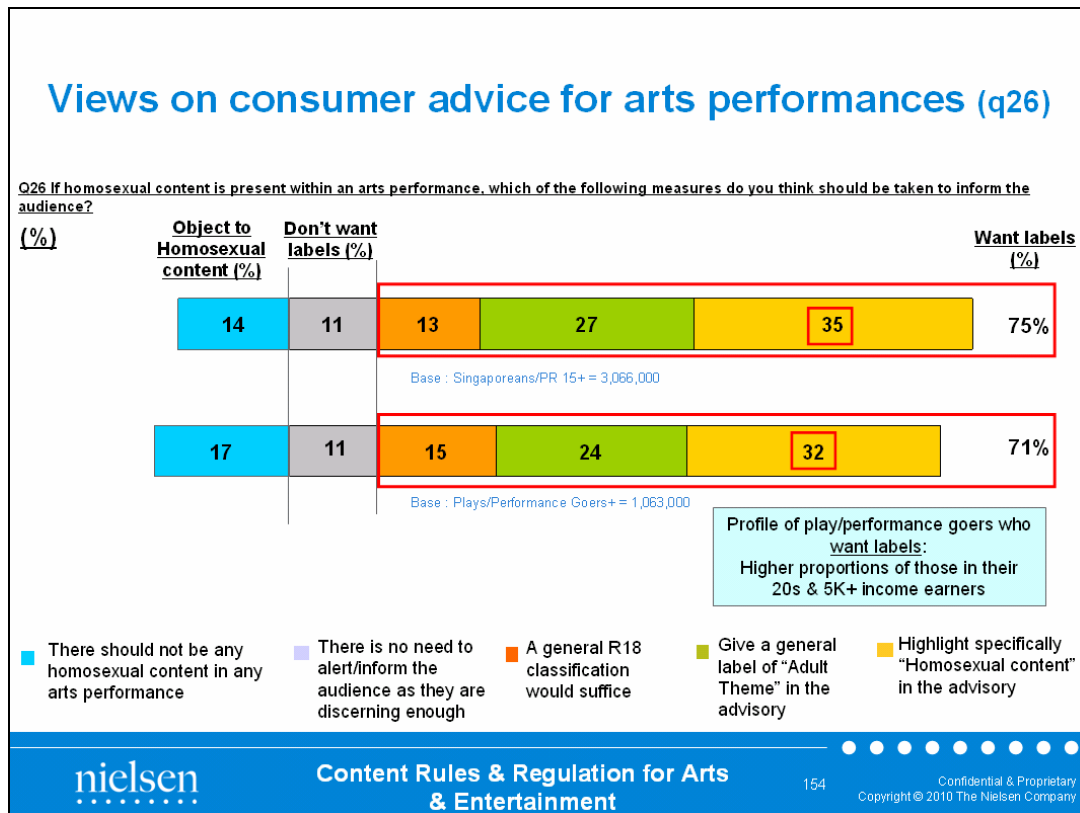
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Use of Consumer Advice for Arts Performances

3 in 4 respondents thought that there was a need to inform the audience with the presence of “homosexual content” within an arts performance.

1 in 3 respondents (35%) thought that “homosexual content” should be specifically highlighted in the advisory while 1 in 4 respondents (27%) thought that a general label of “adult theme” should be given in the advisory.

A similar trend was noted amongst Plays/Performances goers.



Public Education/ Feedback and Views on Citizen Committee

Introduction	<p>This section provides insights on:</p> <ul style="list-style-type: none">• Likelihood of giving feedback and methods of giving feedback• Views on communication of content regulatory policies and guidelines• Level of understanding of content regulatory policies and guidelines• Preference of information sources for content regulatory policies and guidelines• Views on appeal committees having the final decision-making power
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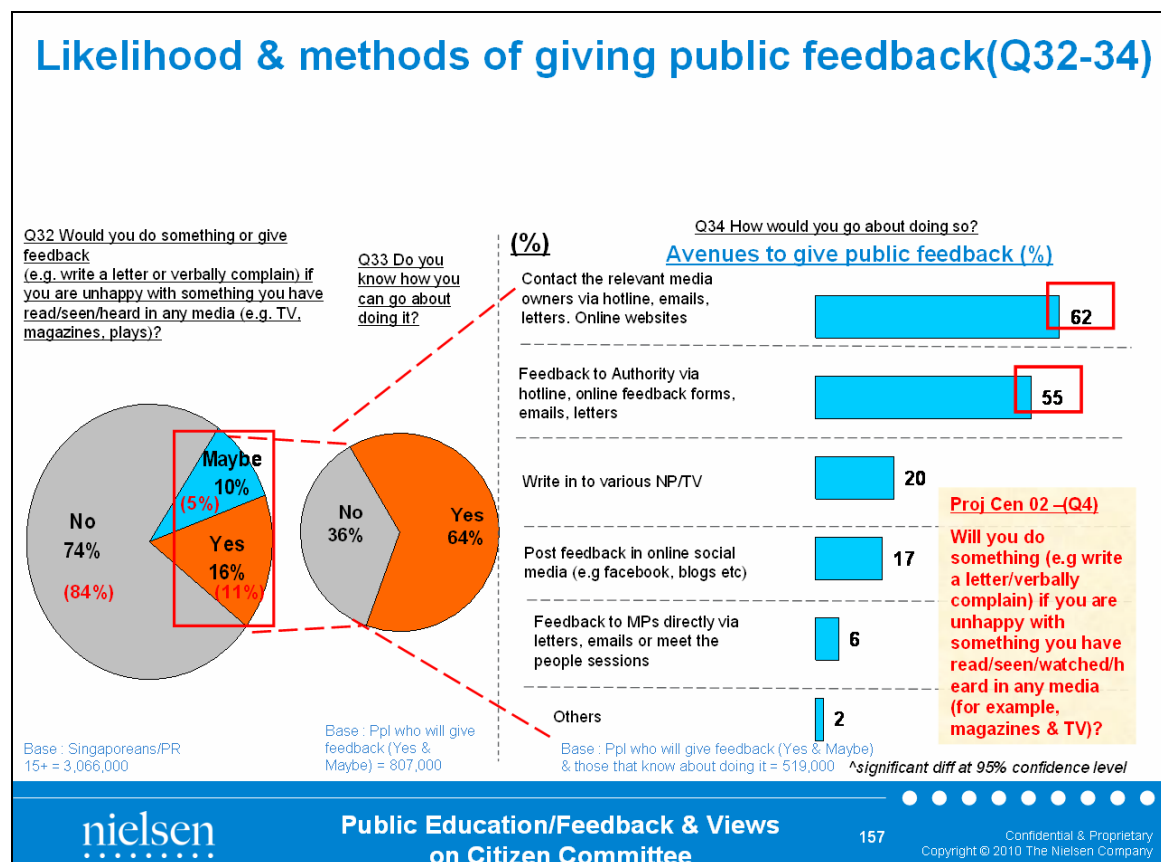
Likelihood and Methods of Giving Feedback

3 in 4 (74%) respondents would not give feedback if they were unhappy with something they had read/seen/heard in any media.

As compared to 2002, there was a decline in people not giving public feedback and a corresponding improvement in people who will/may give public feedback.

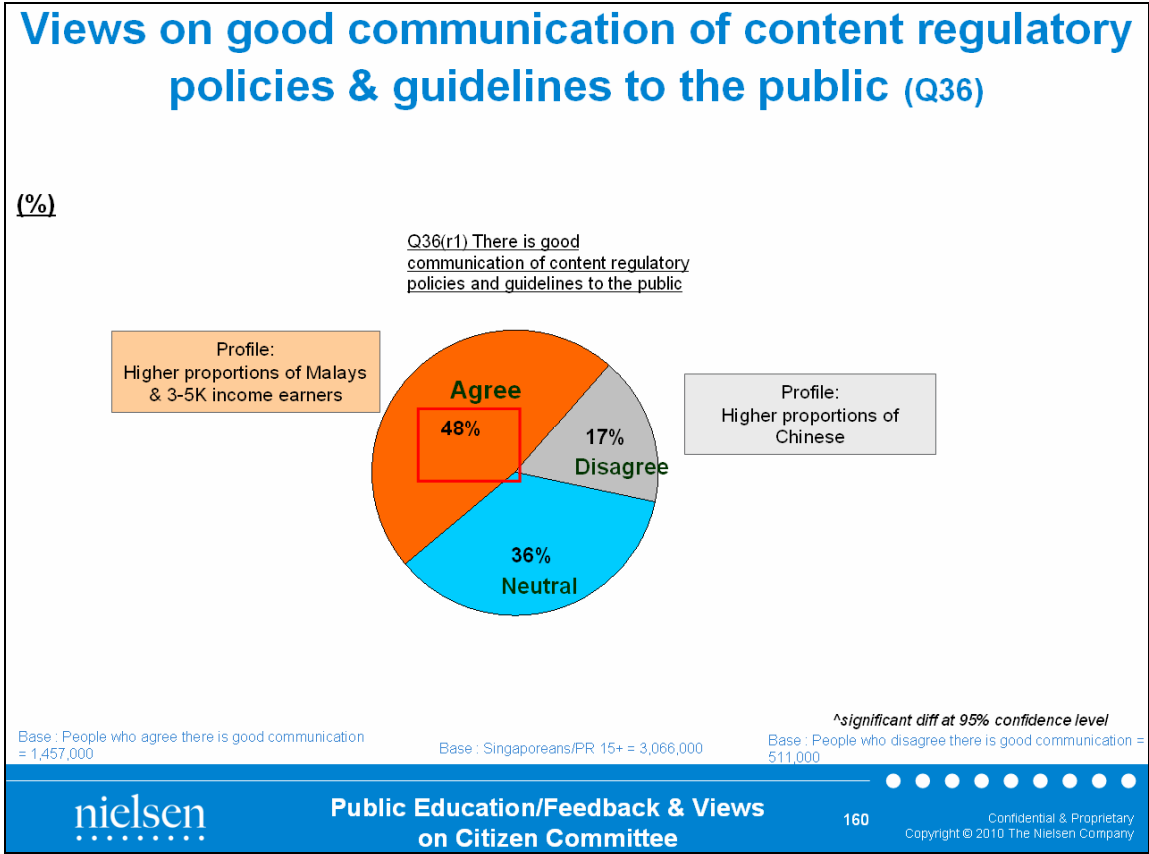
Amongst those who would/might give feedback (26%), about 2 in 3 (64%) respondents knew how to go about doing it.

Amongst those who knew how to go about giving feedback, more than half of respondents would contact the relevant media owners and feedback to the Authority.



Views on Communication of Content Regulatory Policies and Guidelines

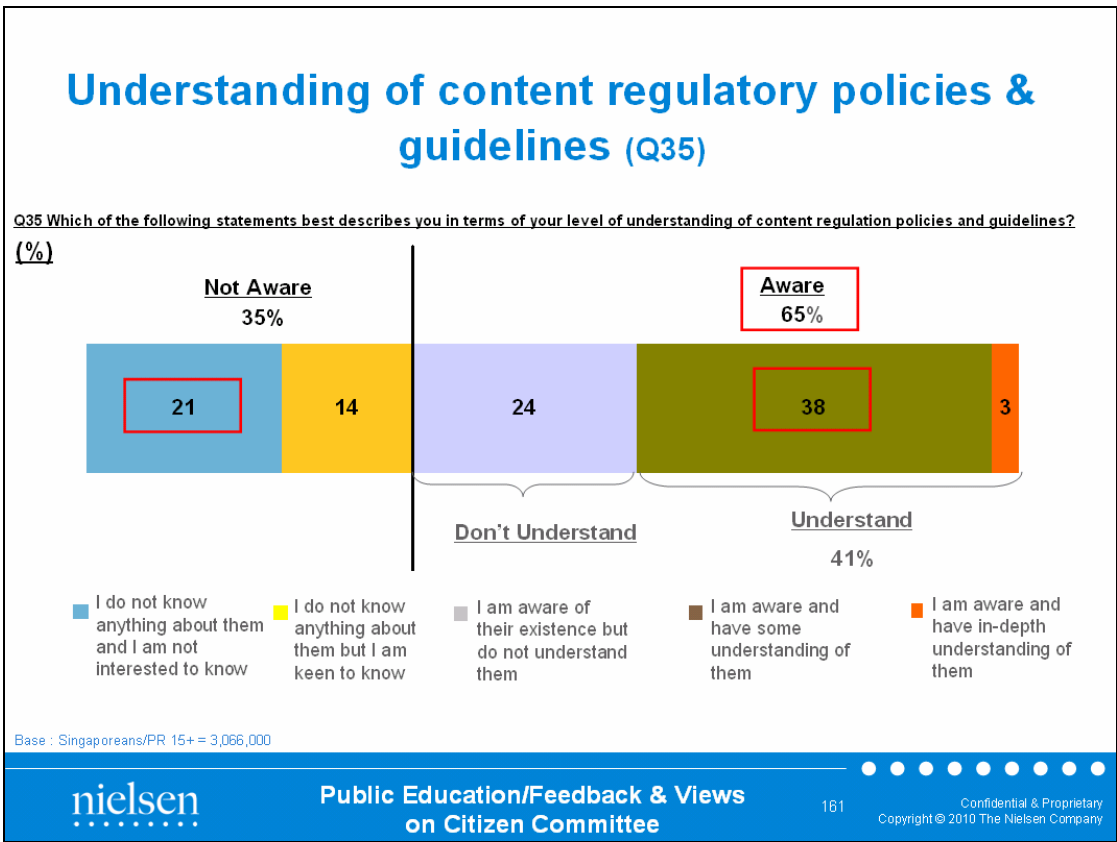
Close to half (48%) of respondents agreed that there was good communication of content regulatory policies and guidelines to the public



Awareness & Understanding of Content Regulatory Policies and Guidelines

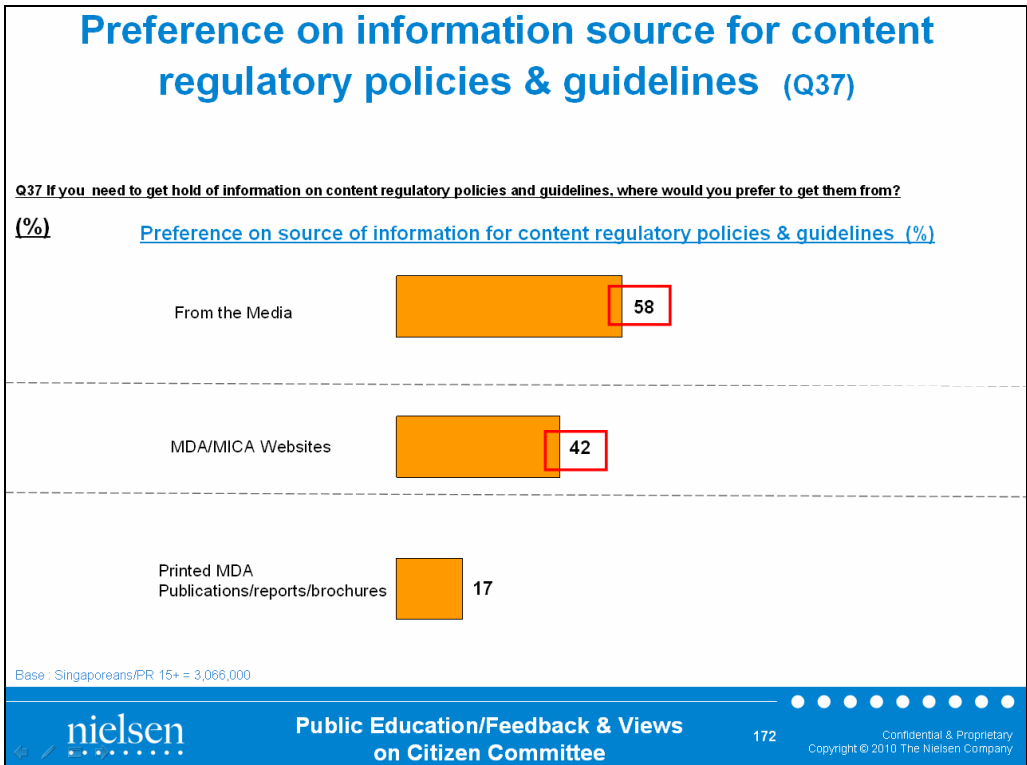
2 in 3 (65%) respondents were aware of content regulation policies and guidelines, with comparatively more (41%) having understanding of the policies and guidelines.

However, 35% were unaware of the policies and guidelines.



Information Source for Content Regulatory Policies and Guidelines

More respondents preferred obtaining information on content regulatory policies and guidelines from the media (58%), followed by MDA/MICA Websites (42%) and printed MDA publications/reports/brochures (17%).



Views on Appeal Committees Having Final Decision-Making Power

While 55% of respondents thought that the appeal committee should have the final decision-making power, there was also a sizable group of 40% who thought otherwise.

