

MDA Media Consumer Experience Study 2015

Content

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1. Executive Summary

Executive Summary

Satisfaction Indices

- Consumers' overall satisfaction with media services was 76.6% in 2015, an improvement from 75.7% in 2014. In particular, satisfaction with the quality and variety of media content, and customer service standards had increased.
- Satisfaction with Singapore's content standards also rose in 2015, from 72.4% in 2014 to 74.1% in 2015.

Media Consumption Habits

- Watching Free-to-Air TV remained the top media activity in terms of time spent at 17.4 hours weekly in 2015, a slight increase from 17.0 hours in 2014.
- Respondents generally relied on traditional media to discover TV shows, and digital media for online content.

Free-to-Air and Pay TV

- Amongst respondents who spent time watching Mediacorp's Free-to-Air TV, 99.1% watched Mediacorp channels at least once a month, up from 89.7% in 2014.
- 68.2% of consumers said they subscribed to Pay TV services in 2015, down from 69.3% in 2014.

2. Research Objectives and Methodology

Research Objectives and Methodology

The **Media Consumer Experience Study (MCES)** is an annual study commissioned by the Media Development Authority (MDA) of Singapore and aims to:

- Measure consumers' satisfaction with media services and content standards;
- Analyse consumers' media consumption patterns across platforms and devices from 2011 to 2016; and
- Identify and analyse key changes in consumers' media preferences.

Conducted by Degree Census Consultancy Pte Ltd, the survey sample consisted of 2,000 Singapore Citizens and Permanent Residents aged 15 to 65 years, representative of the Singapore population aged 15 and above. Responses were gathered from October to December 2015 via face-to-face interviews lasting about 45 minutes each.

Note:

- Throughout this report, figures in **blue** indicate a statistically significant increase from the previous year, while figures in **red** indicate a statistically significant decrease.
- Results from a sample size of less than 30 respondents should be interpreted with caution.

3. Satisfaction Indices

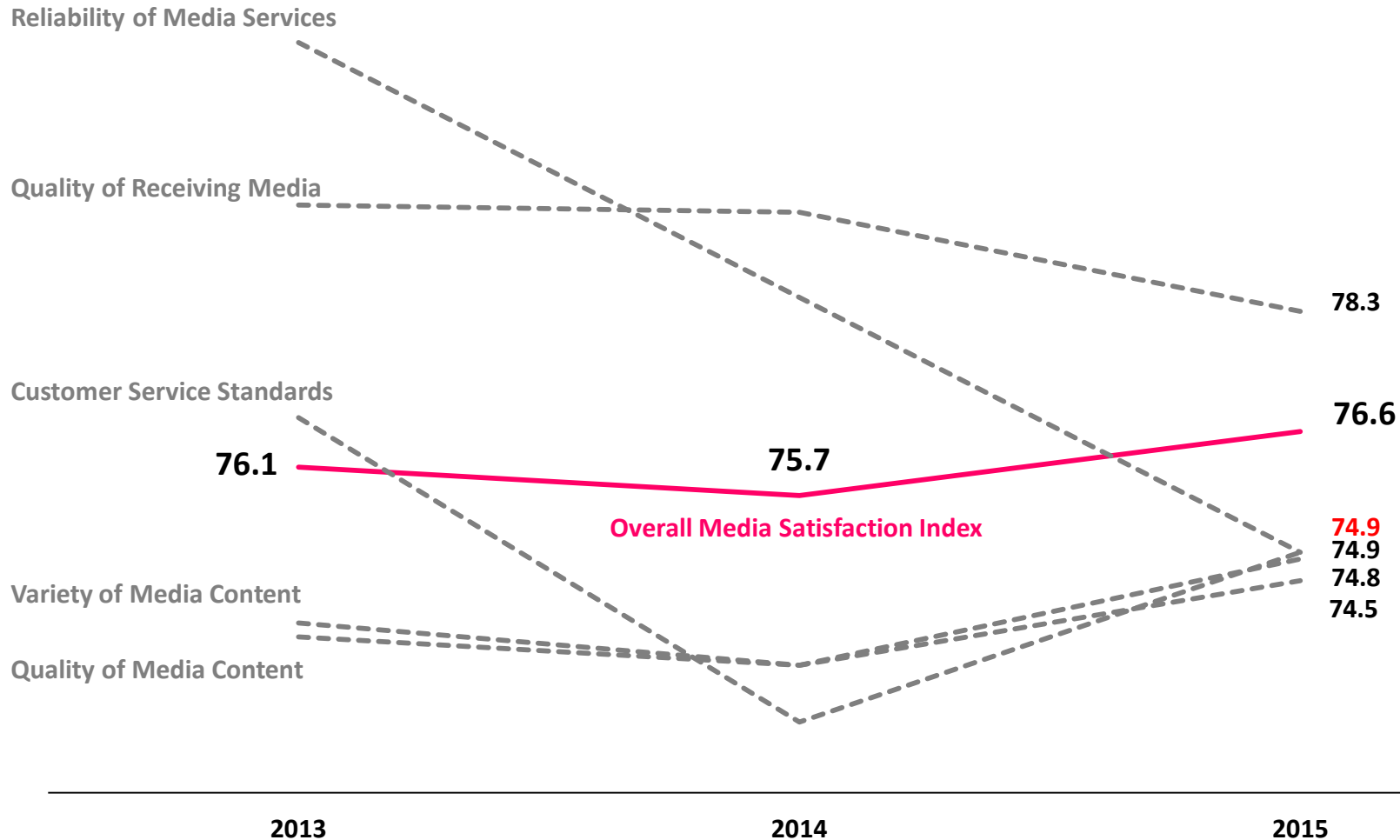
Satisfaction with media services rose from 75.7% in 2014, scoring 76.6% in 2015

- The Overall Media Satisfaction Index (OMSI) is an indication of consumers' satisfaction with media services, and comprises the five components listed below.
- An OMSI score of 76.6% indicates that in general, consumers ranged from being slightly satisfied to satisfied with the media services available in Singapore.



Rise in satisfaction with quality and variety of media content, and customer service standards contributed to OMSI improvement

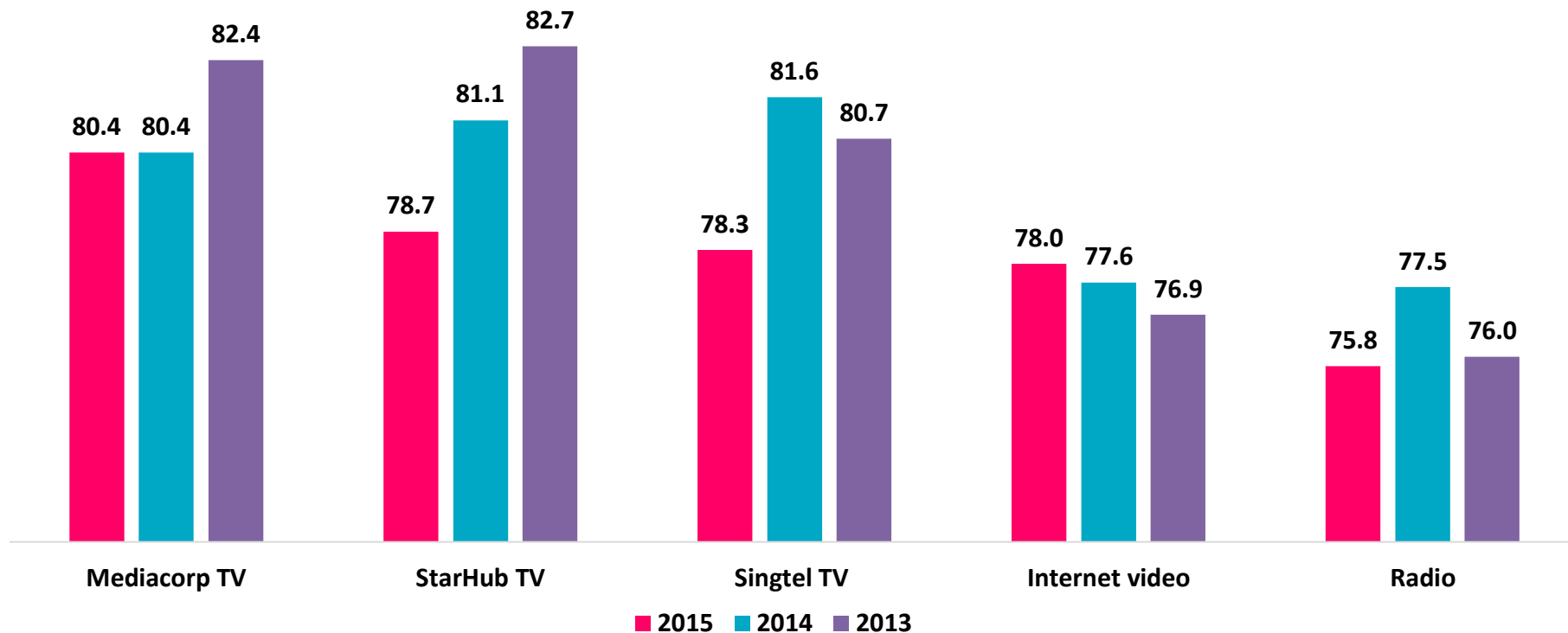
Chart 1: Overall Media Satisfaction Index and components (%)



Quality of Receiving Media: Satisfaction with **Mediacorp's Free-to-Air TV was the highest**

- Amongst the three broadcasters, consumers were most satisfied with the picture and audio quality of programmes on Mediacorp Free-to-Air TV.
- Satisfaction with the quality of reception of Internet videos was the only platform that saw an increase from the past year, from 77.6% in 2014 to 78.0% in 2015.

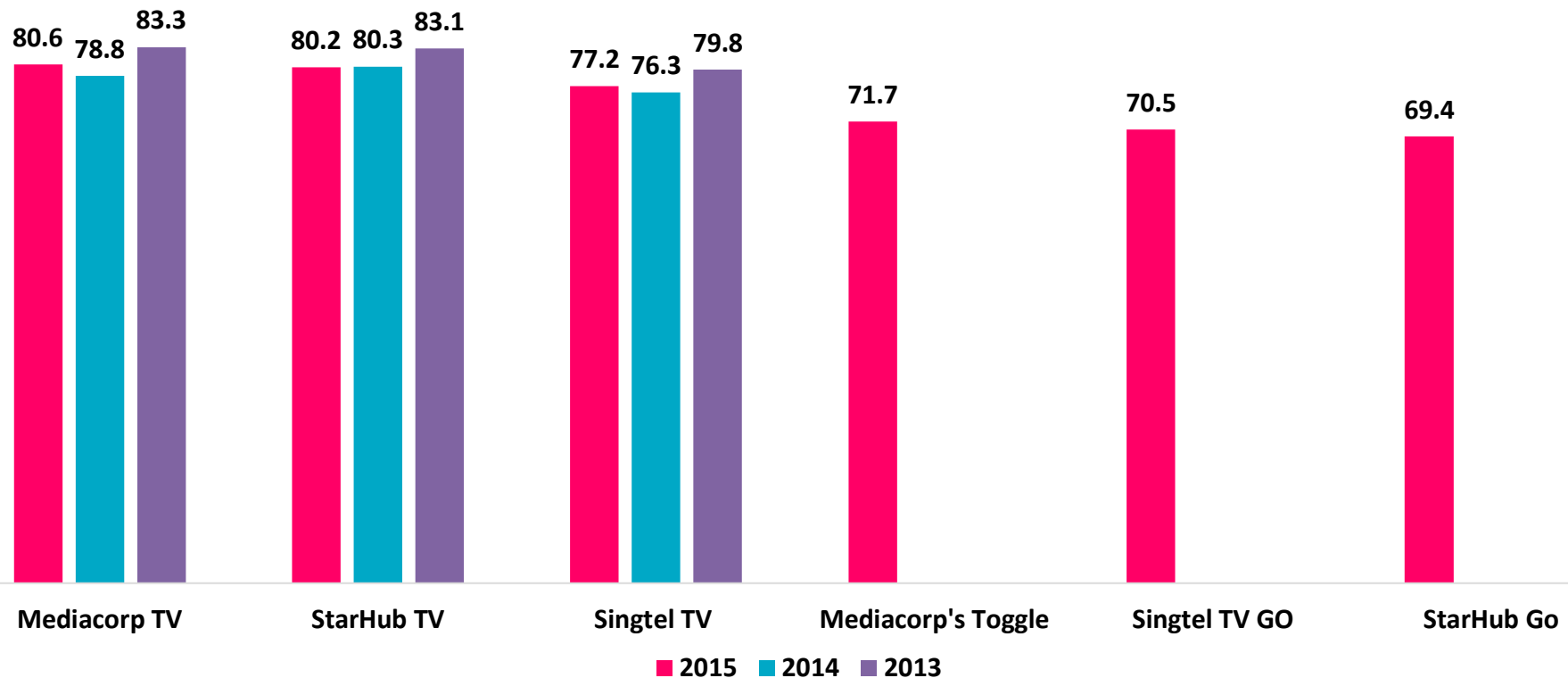
Chart 2: Satisfaction with Quality of Receiving Media (%)



Reliability of Media Services: Mediacorp's Free-to-Air TV also scored the highest for reliability

- More than 8 out of 10 consumers were satisfied with the reliability of Mediacorp Free-to-Air TV's media services.
- For the first time in 2015, consumers were also asked for their satisfaction with the broadcasters' OTT platforms' reliability, in which Toggle scored the highest at 71.7%.

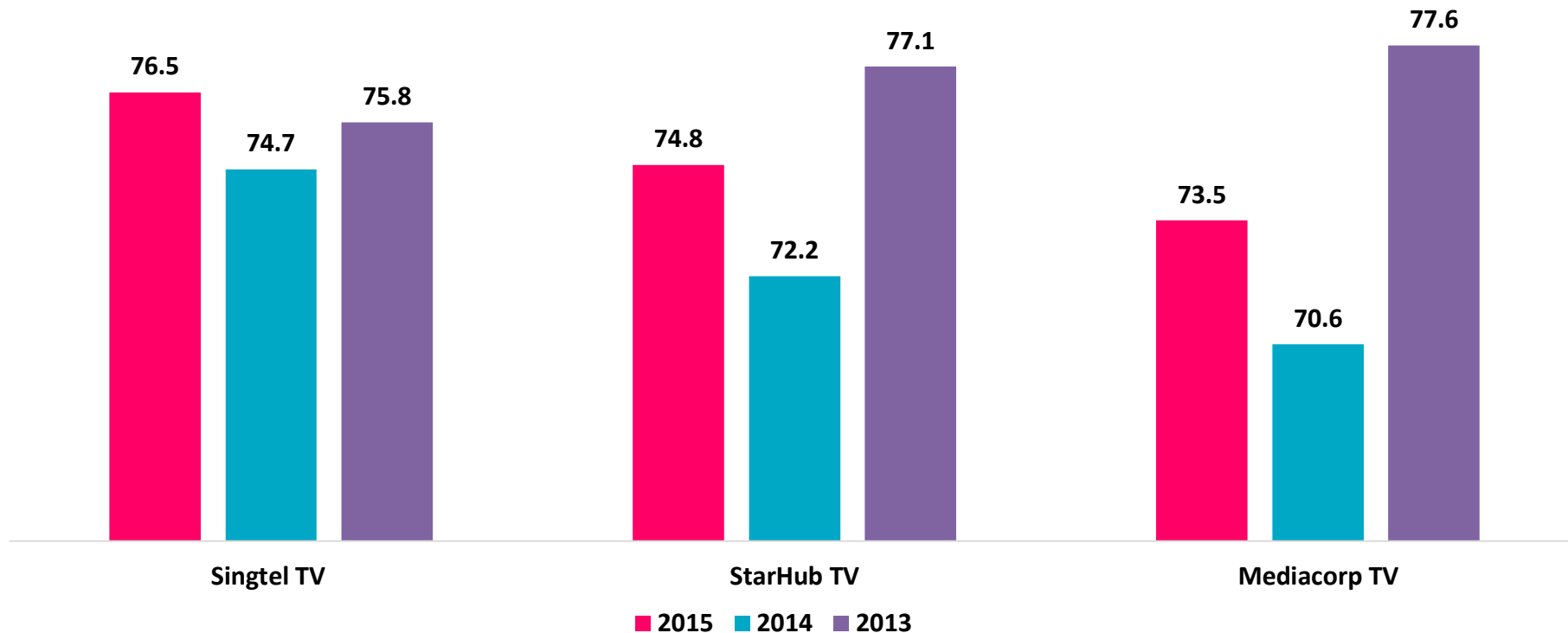
Chart 3: Satisfaction with Reliability of Media Services (%)



Customer Service Standards: Consumers remained most satisfied with Singtel TV's customer service

- Satisfaction with Singtel TV's customer service standards remained relatively stable, scoring 76.5% in 2015.
- Consumer satisfaction with the customer service standards of all three broadcasters increased from 2014 to 2015.

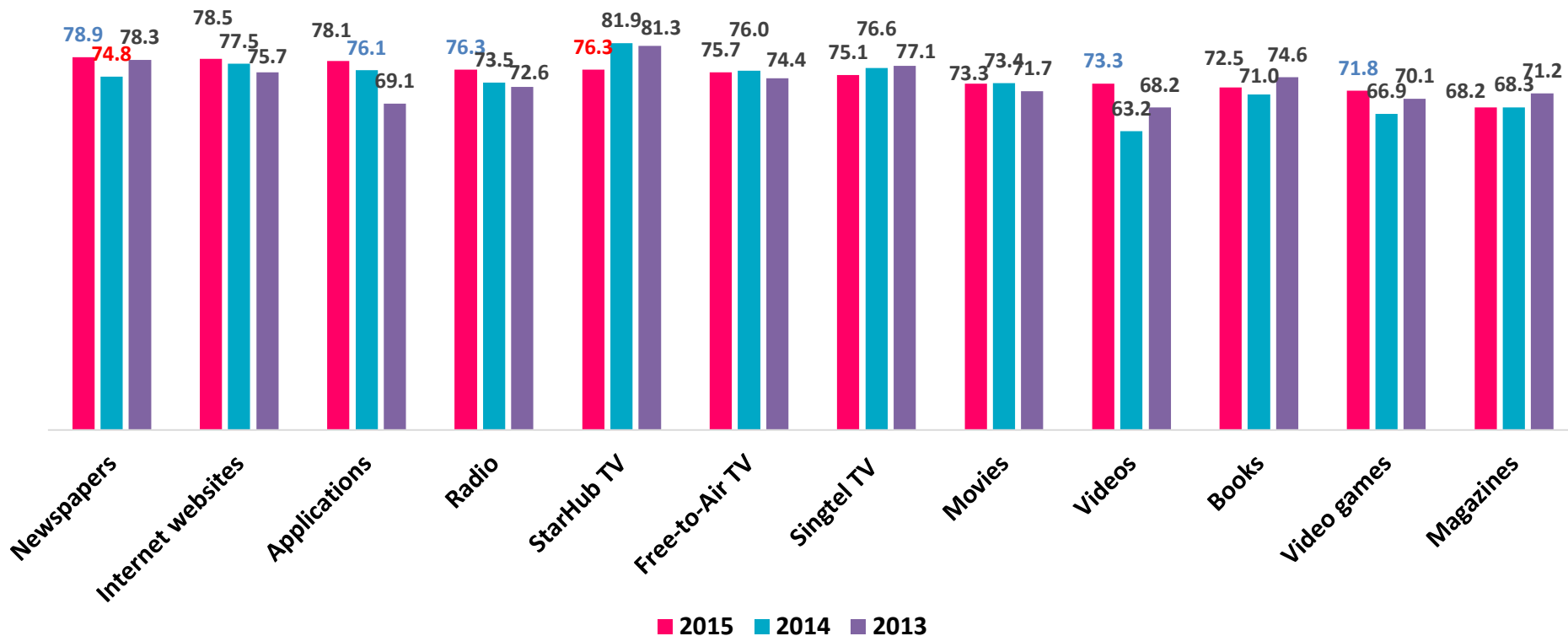
Chart 4: Satisfaction with Customer Service Standards (%)



Quality of Media Content: Consumers most satisfied with newspapers' content quality

- Newspapers' ranking improved from sixth in 2014 to top in 2015, a reversal of the statistically significant drop in satisfaction in 2014.
- Satisfaction with the quality of Video content saw the largest increase from 2014 to 2015 – an increase of nearly 10% from 63.2% to 73.2%.

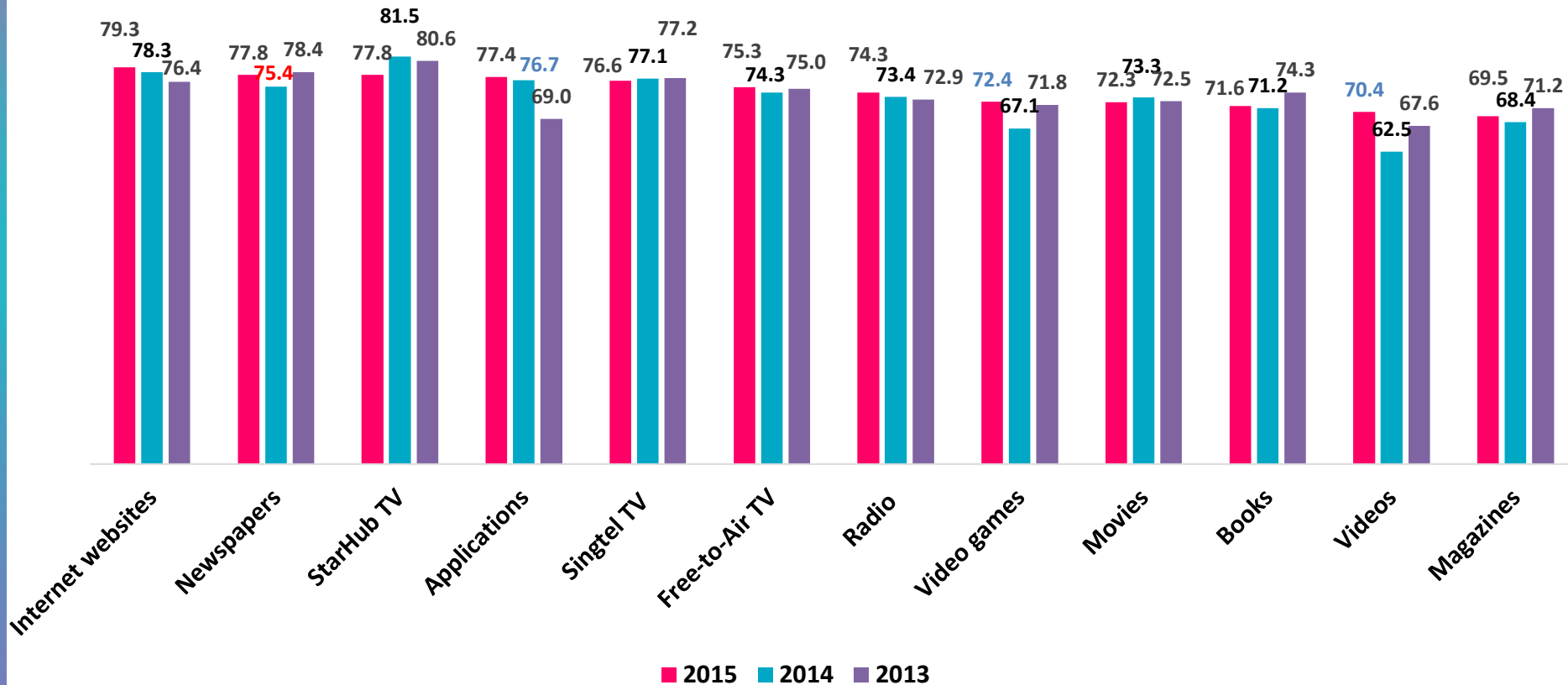
Chart 5: Satisfaction with Quality of Media Content (%)



Variety of Media Content: Satisfaction with the variety of Internet content ranked first

- Satisfaction with the variety of content available online remained high at 79.3%.
- Similar to quality, satisfaction with Videos' content variety also increased the most, from 62.5% in 2014 to 70.4% in 2015.

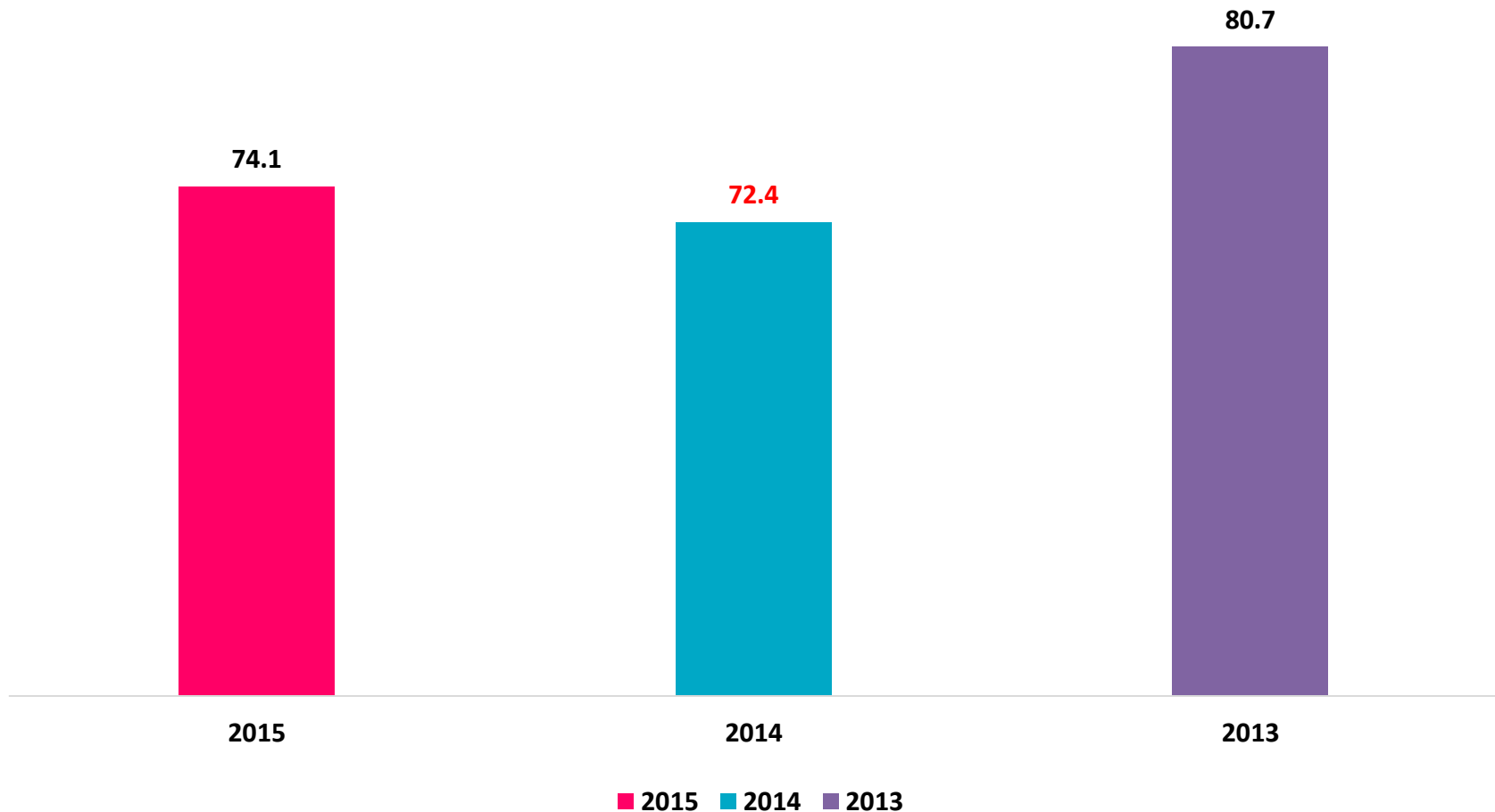
Chart 6: Satisfaction with Variety of Media Content (%)



Satisfaction with local content standards increased from 2014 to 2015

- More than 7 in 10 consumers (74%) were at least slightly satisfied with local content standards in 2015.

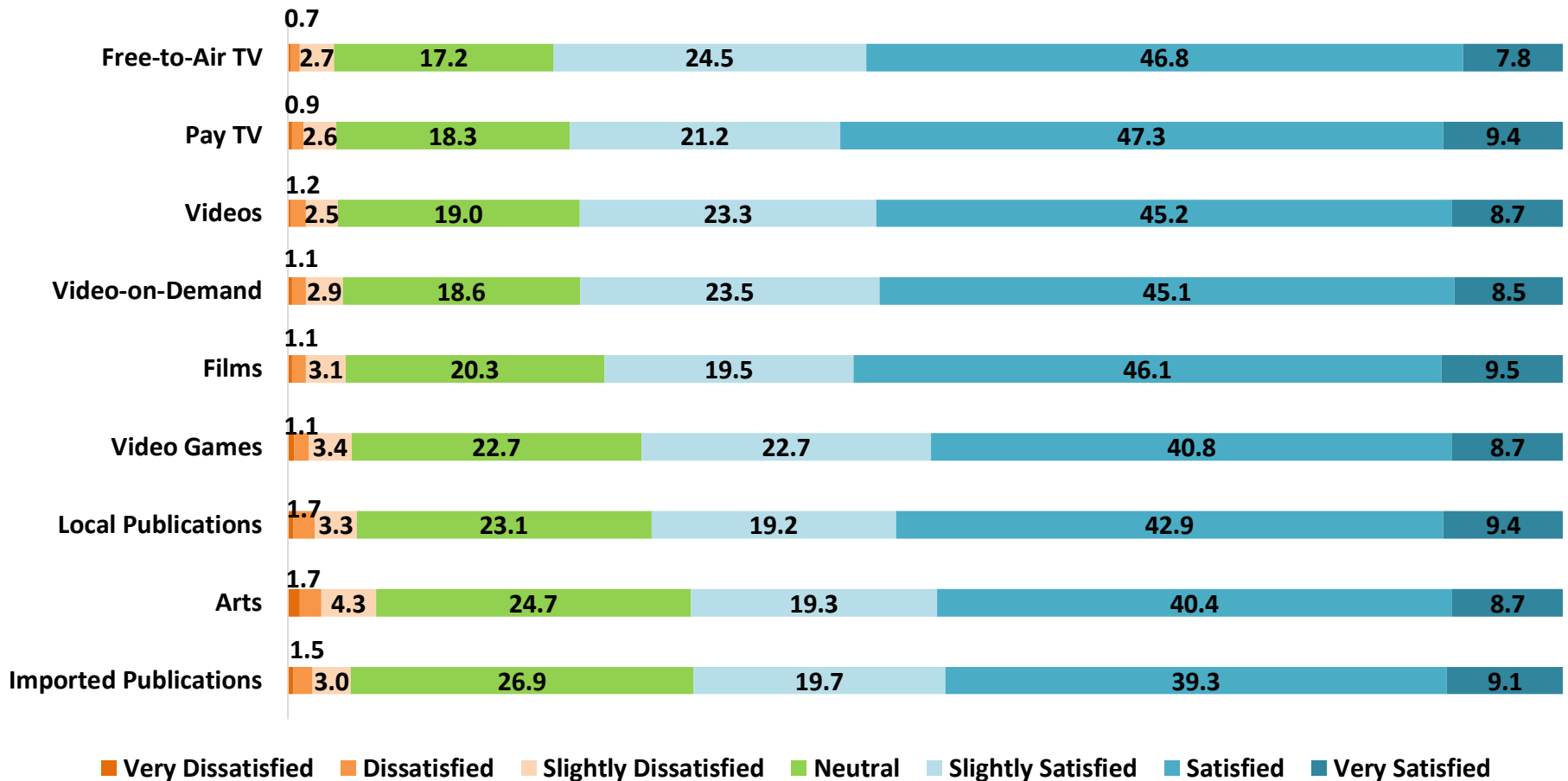
Chart 7: Overall Content Standards Satisfaction Index (%)



Consumers most satisfied with the content standards for Free-to-Air and Pay TV

- Satisfaction with Free-to-Air TV overtook that of Videos to rank top with 79.1% of consumers being at least slightly satisfied with Free-to-Air TV's content standards.

Chart 8: Personal Satisfaction with Content Standards (%)



Awareness and usage of the Content Classification Systems

Systems remained relatively consistent in 2015

- Amongst the media platforms, only Video Games' content classification system saw a statistically significant drop in usage.

Chart 9: Awareness of Content Classification Systems (%)

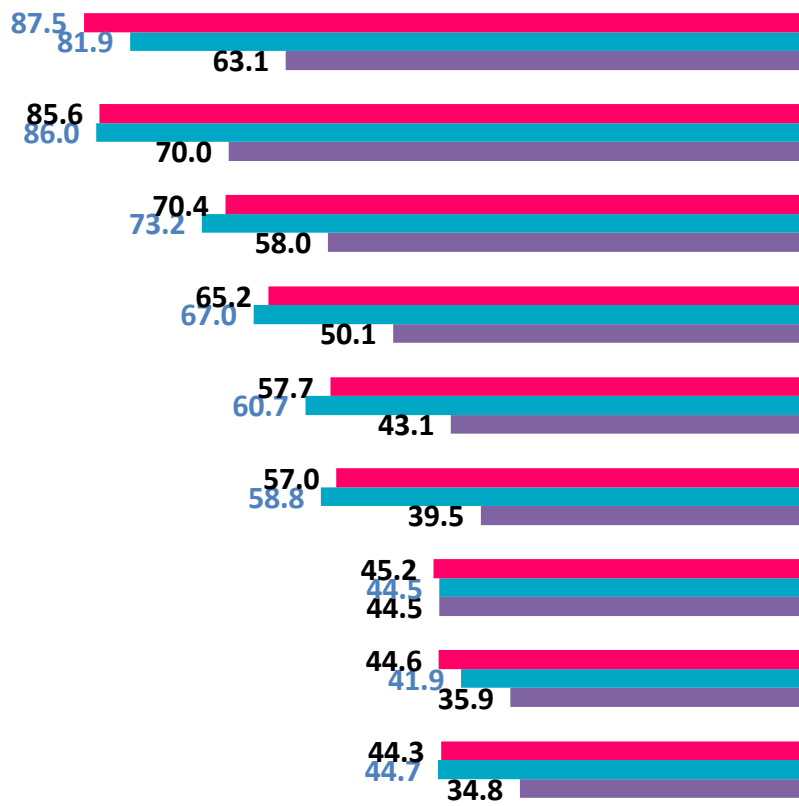
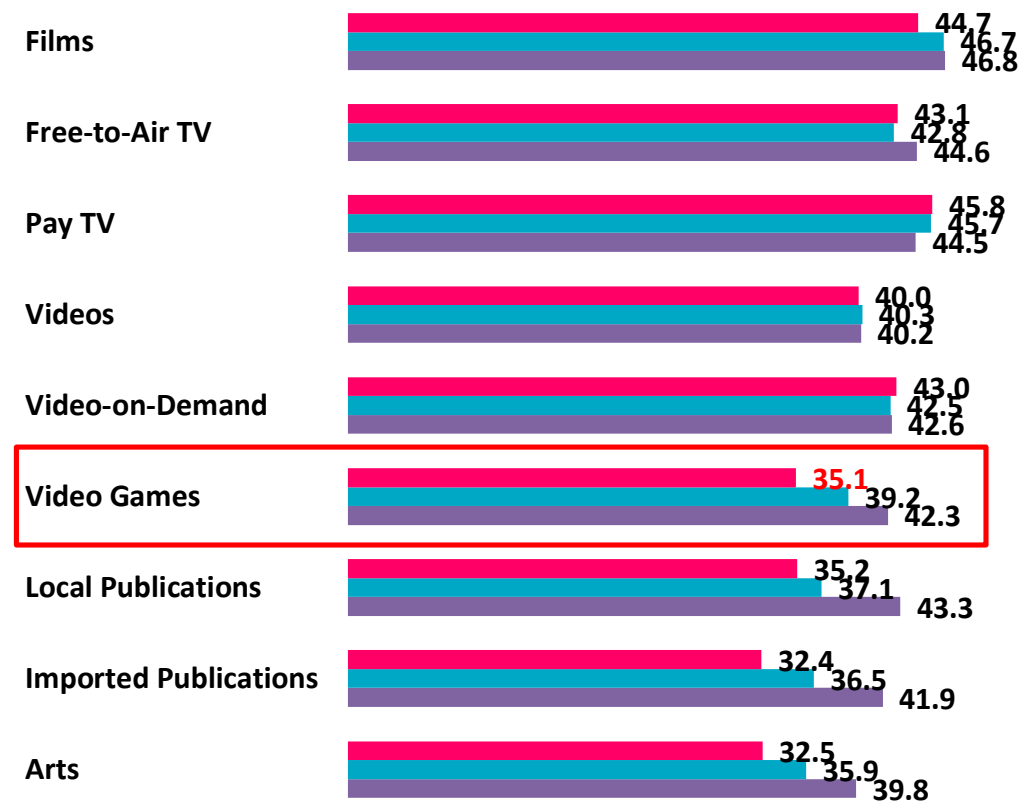


Chart 10: Usage of Content Classification Systems (%)

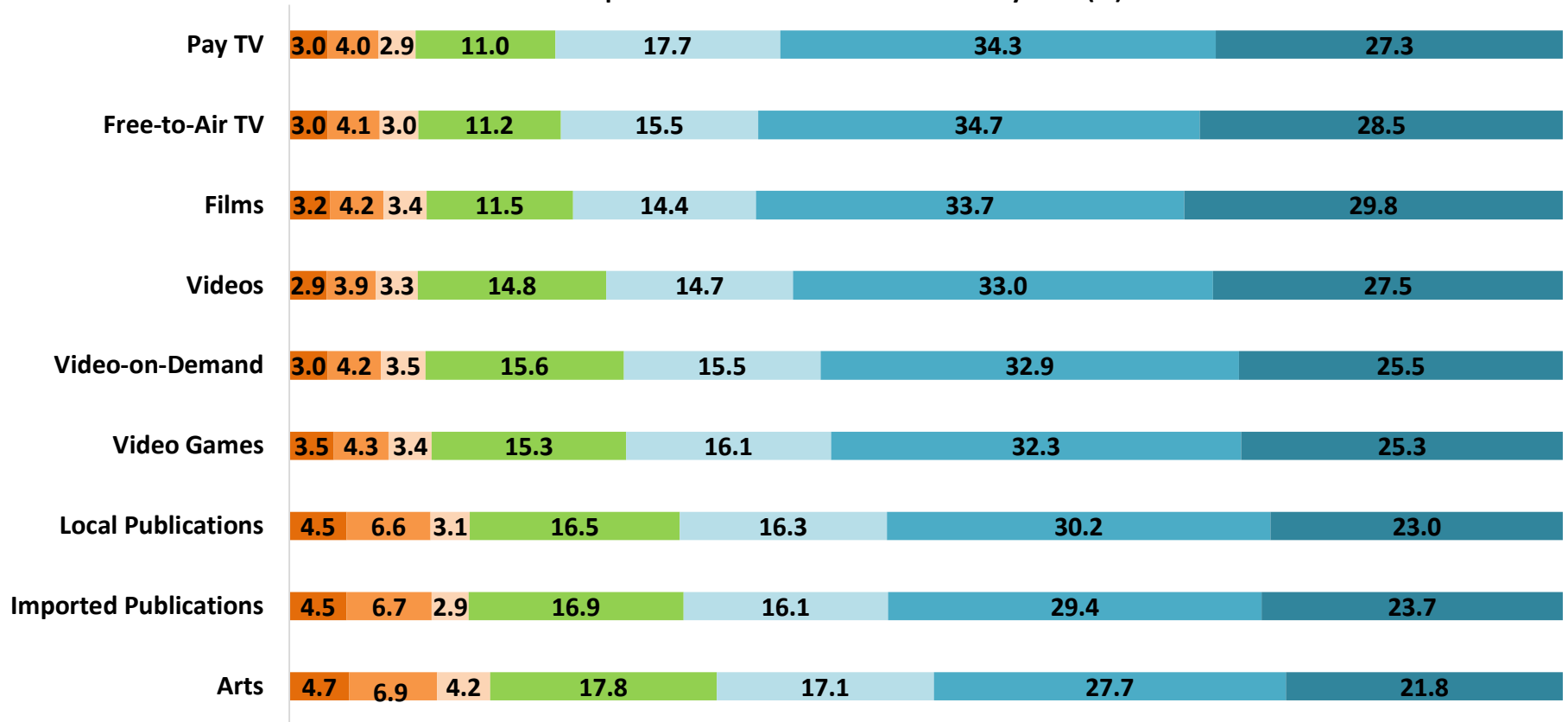


■ 2015 ■ 2014 ■ 2013

Consumers felt that it was most important to rate television content

- Nearly 8 in 10 (79.2%) consumers felt that it was at least slightly important to rate Pay TV content.

Chart 11: Importance of Content Classification System (%)



Very Unimportant Unimportant Slightly Unimportant Neutral Slightly Important Important Very Important

4. Media Consumption Habits

Respondents' top media activity was watching Mediacorp Free-to-Air TV

Chart 12: Time Spent on Media Activities (hours)

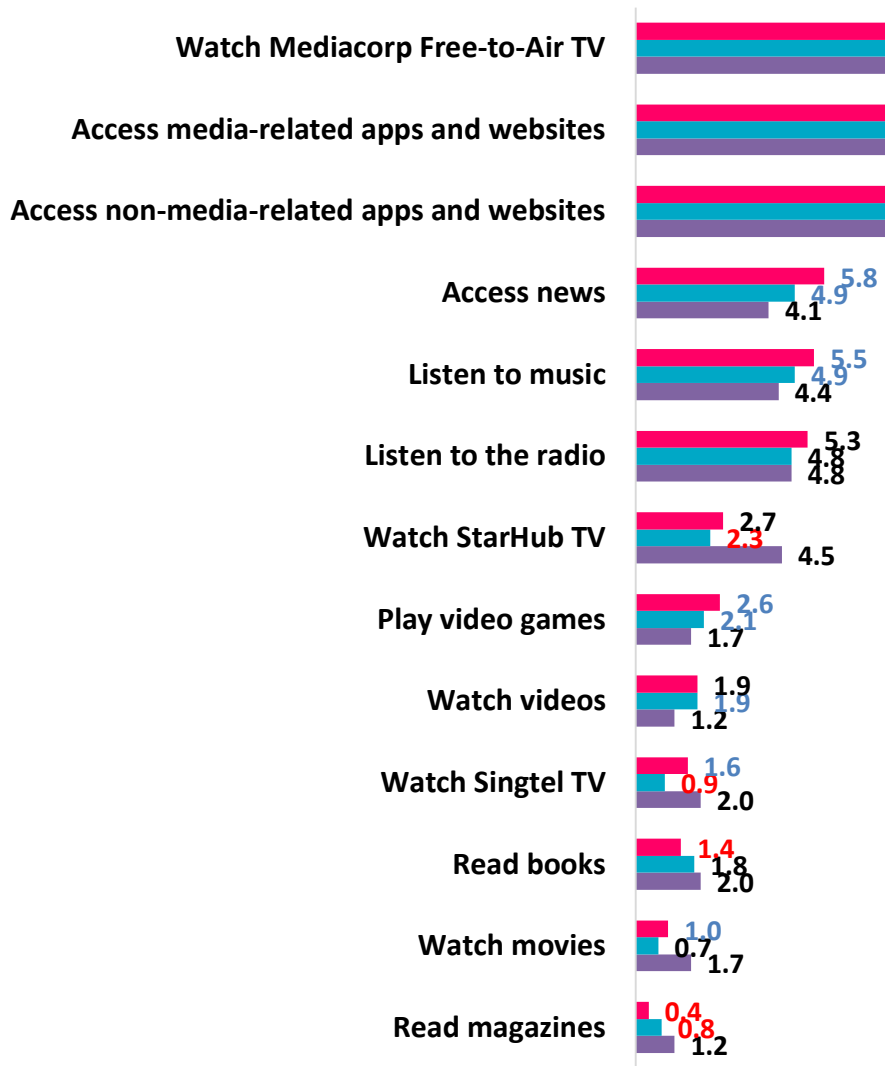


Table 1: Time spent on Mediacorp and online media by age

Age	Watch MediaCorp TV (hours)		Access media-related apps and websites (hours)	
	2015	2014	2015	2014
15-19	15.2	14.2	33.3	24.0
20-29	12.2	12.9	27.2	21.2
30-39	14.9	15.8	18.2	15.3
40-49	18.4	17.3	13.3	12.6
50-59	21.5	20.8	8.3	11.9
60-65	25.7	22.4	6.1	11.4

■ 2015 ■ 2014 ■ 2013

6 in 10 consumers accessed content using multiple devices at the same time

- More than 8 in 10 (82.3%) of consumers multitasked by watching TV and using their mobile phones for calls or instant messaging at the same time.
- Mobile devices featured strongly in multitasking habits, and was used for all top paired activities.

Chart 13: Use multiple devices at the same time (%)

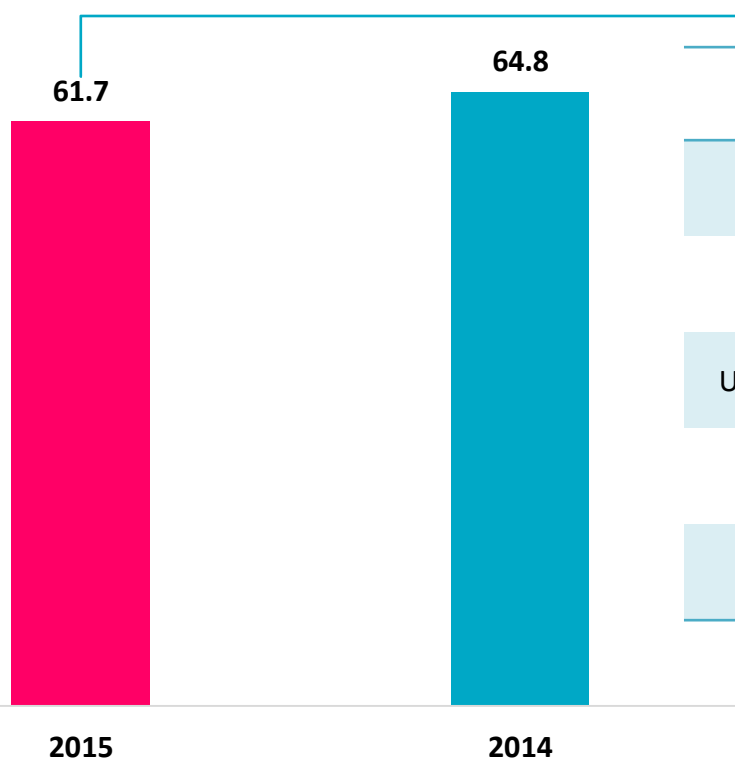
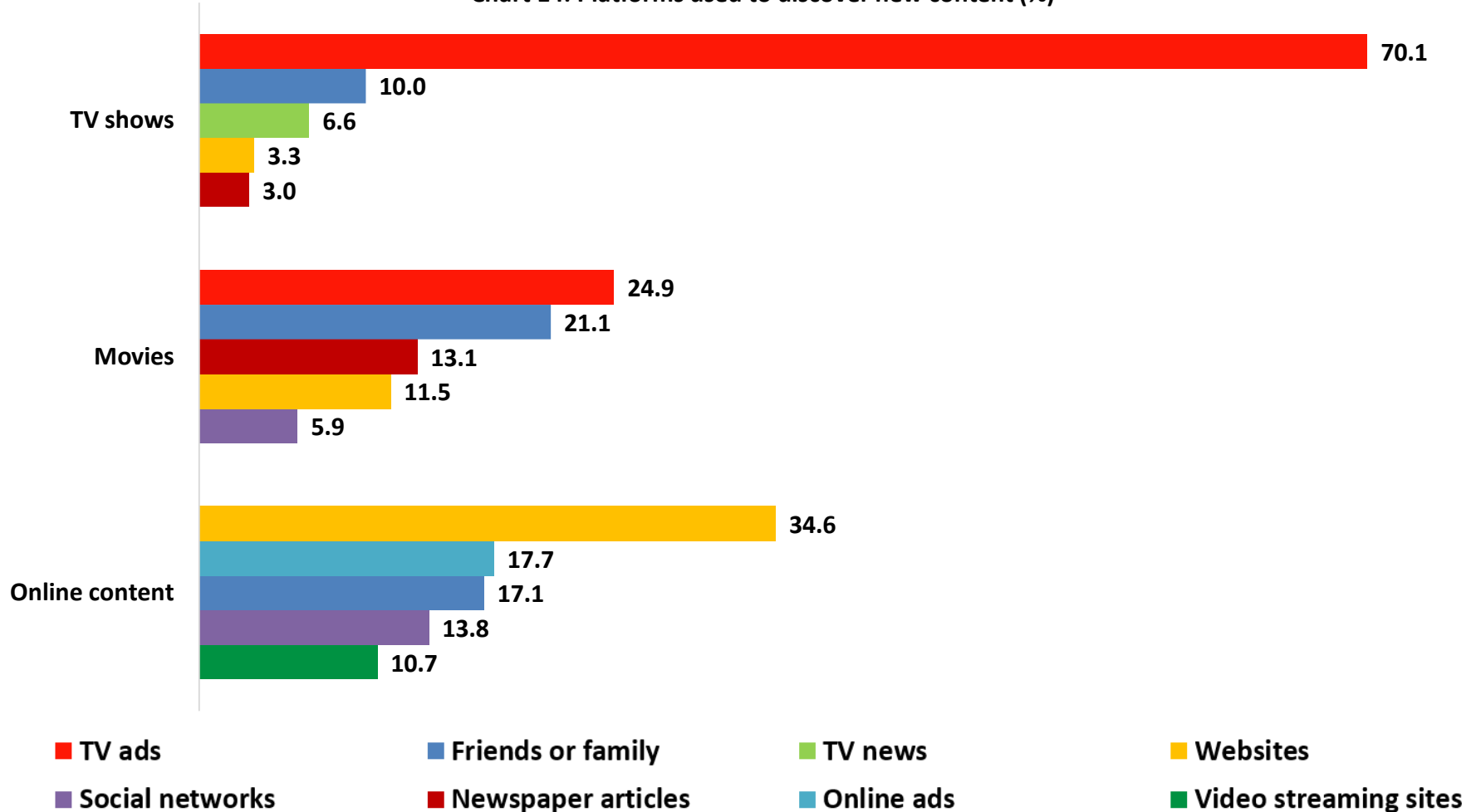


Table 2: Top paired multitasking activities

Primary Activity	Secondary Activity	%
Watching TV	Using mobile devices to WhatsApp/ text/ call	82.3%
Using mobile devices to WhatsApp/ text/ call	Watching TV	74.3%
Using PC/ laptop to go online	Using mobile devices to WhatsApp/ text/ call	68.7%
Listening to music/ radio	Using mobile devices to WhatsApp/ text/ call	66.2%
Using mobile devices to go online	Watching TV	60.6%

Consumers relied on traditional media to discover new TV shows, while digital media aided the discovery of online content

Chart 14: Platforms used to discover new content (%)

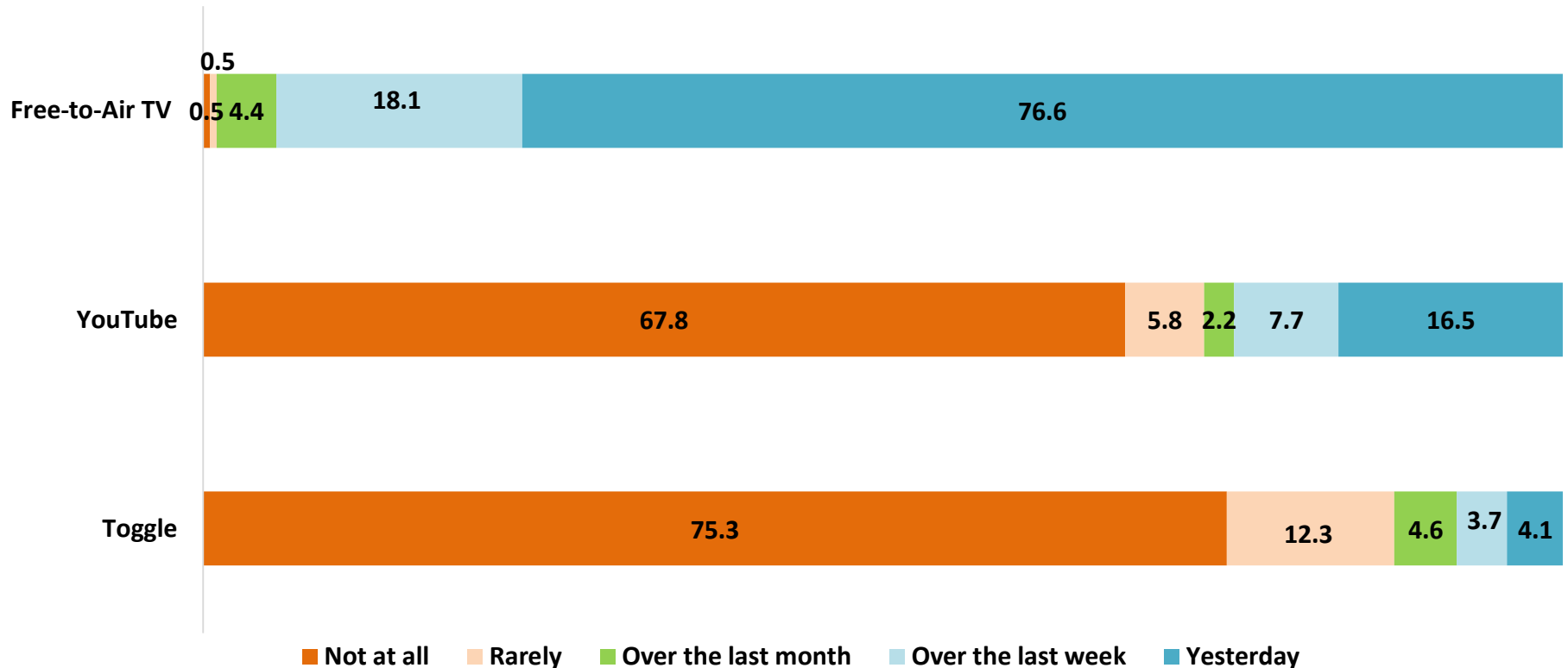


5. Mediacorp and Pay TV

More consumers watched Mediacorp Free-to-Air TV at least monthly in 2015 compared to 2014

- Amongst respondents who watched Mediacorp's Free-to-Air TV, almost all (99.1%) watched Mediacorp TV at least monthly, up from 89.7% in 2014.
- In general, consumers also watched Mediacorp programmes more frequently on YouTube (26.4% watched monthly) compared to Toggle (12.4%).

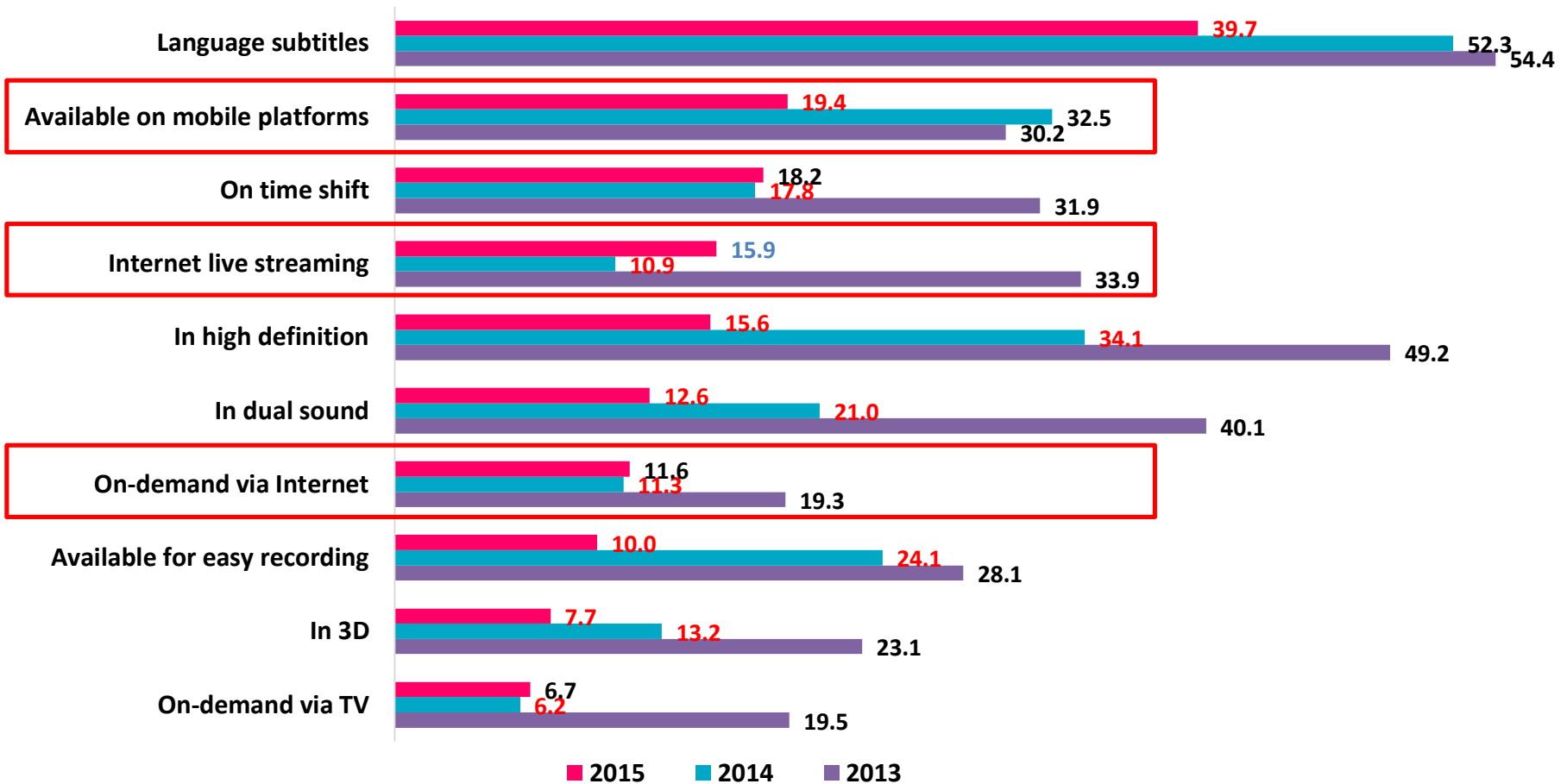
Chart 16: Frequency of watching Mediacorp programmes (%)



Language subtitles remained the top factor in encouraging consumers to watch Mediacorp TV

- In addition to language subtitles, making Mediacorp programmes more accessible on digital media would also spur viewership.

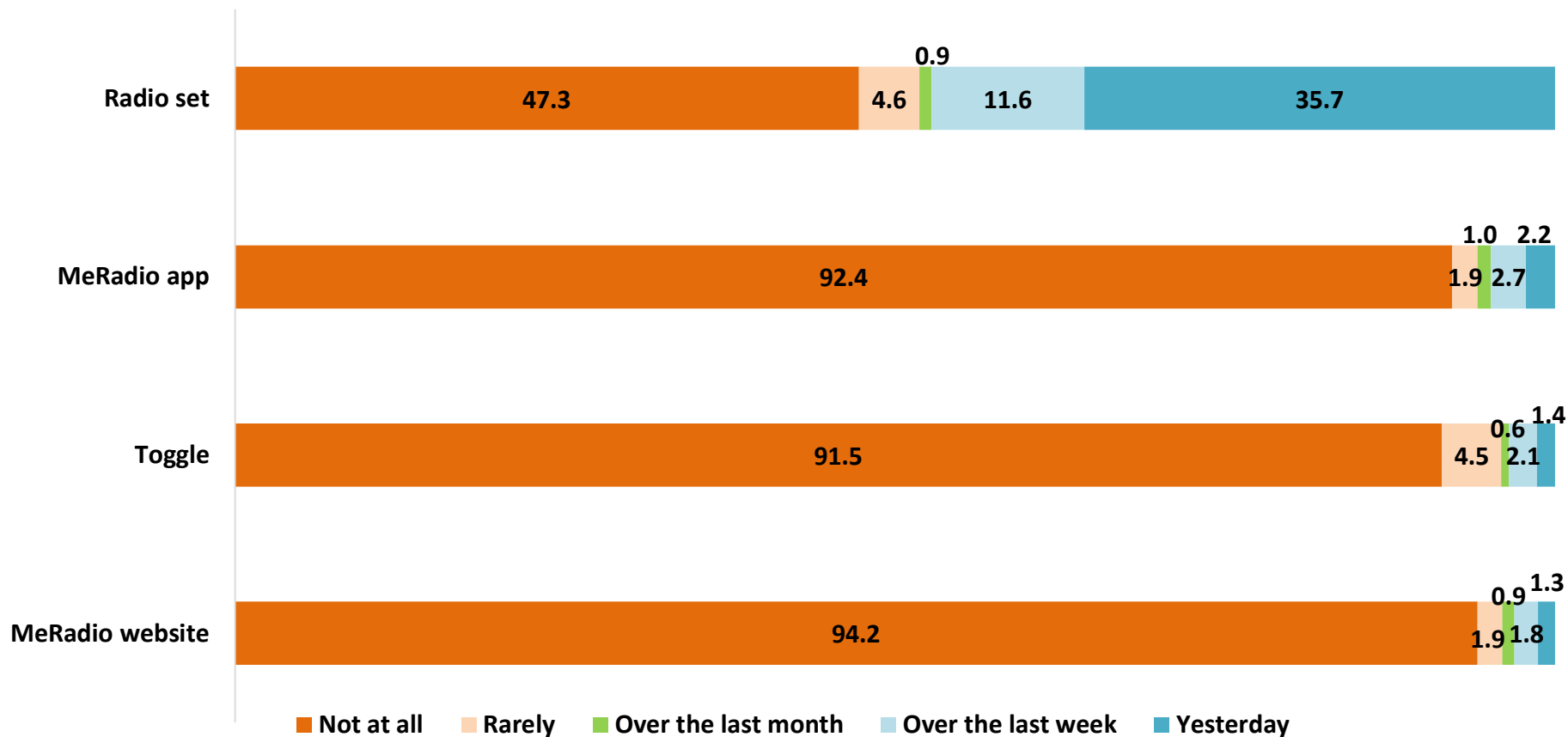
Chart 17: Programme features encouraging Mediacorp consumption (%)



Monthly radio listenership via the radio set in 2015 remained similar to that in 2014

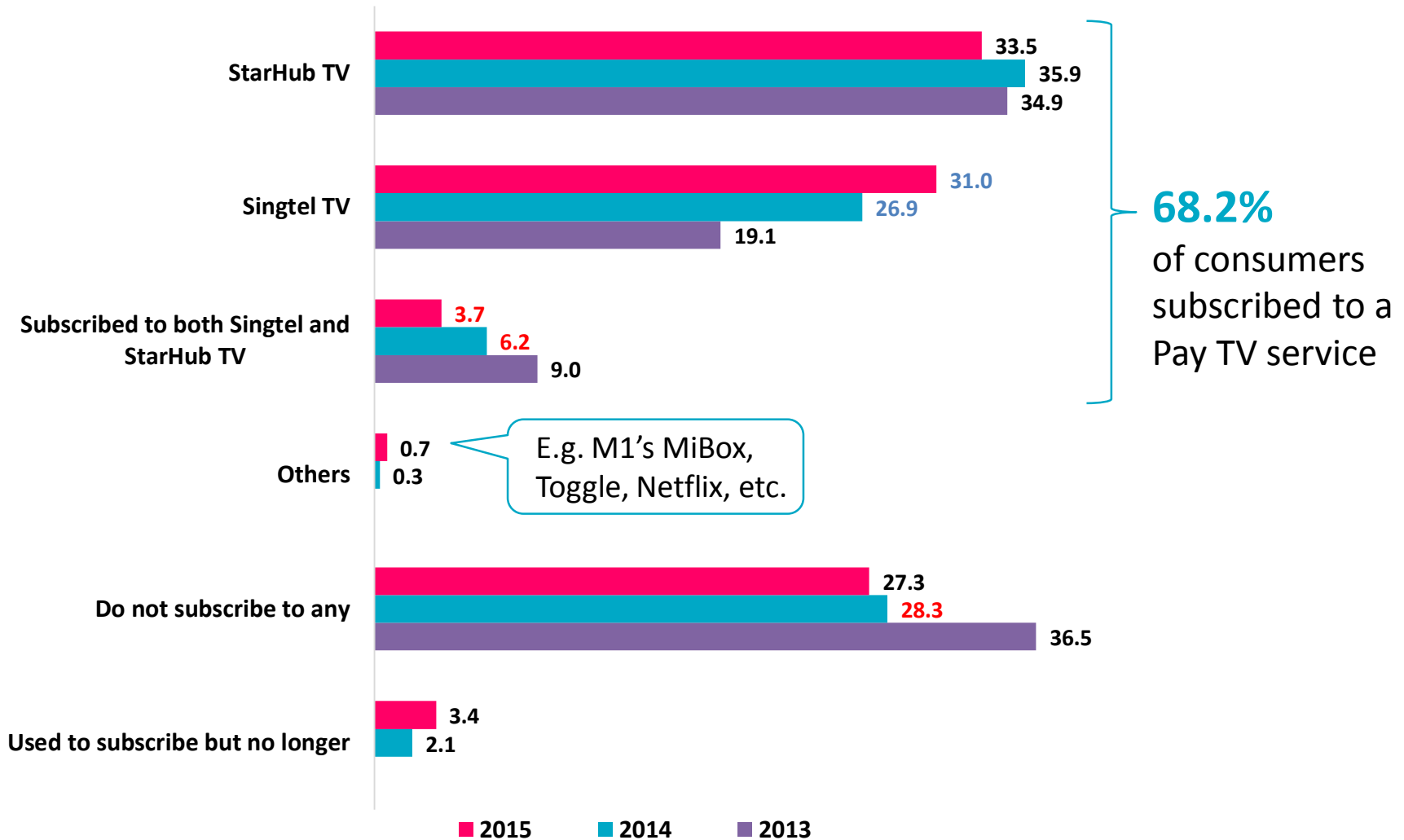
- Around half of consumers (48.1%) listened to the radio via the radio set at least once every month, similar to 48.3% in 2014.
- Listenership to the radio via other platforms remained low.

Chart 18: Frequency of listening to Mediacorp radio (%)



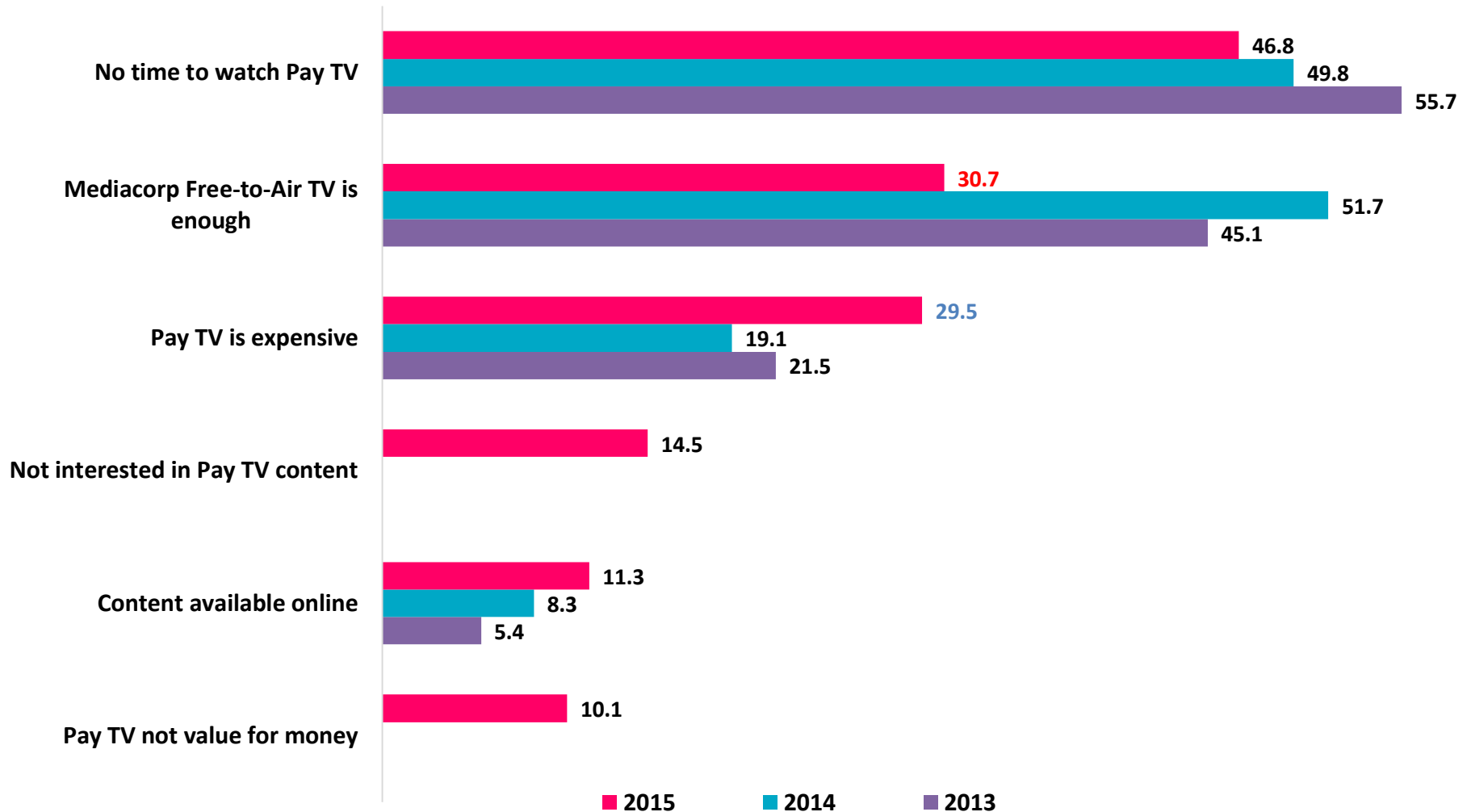
Pay TV take-up also remained relatively consistent, while dual subscription continued to fall

Chart 19: Pay TV subscription (%)





The lack of time was the top reason for not subscribing to Pay TV

Chart 20: Reasons for not subscribing to Pay TV (%)



Thank You

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