

Media Consumer Experience Study 2014

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1. Executive Summary

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Satisfaction Indexes

- Overall Media Satisfaction Index was 75.7% in 2014. Consumers were most satisfied with the quality of media reception and reliability of media services.
- Content Standards Satisfaction Index was 72.4% in 2014. There was greater awareness of the content classification system, with four out of 10 consumers using it for their decision making

Media Consumption Habits

- Consumers spent the most time watching MediaCorp TV, averaging 17 hours weekly
- MediaCorp TV was the platform most used to consume Singapore-related news
- Pay TV subscription increased with a take-up rate of 69.3%, while dual subscription rates have fallen
- Mobile phone usage was the top concurrent media activity when multi-tasking

Digital TV

- Two out of three consumers were aware that MediaCorp is broadcasting digitally
- About half were able to watch digital TV in 2014



2. Introduction

2.1 Research Objectives

The Media Consumer Experience Study (MCES) is an annual study commissioned by the Media Development Authority (MDA). This is the third edition of the MCES, with previous editions conducted in 2011 and 2013. Like the previous study, the MCES 2014 provides insights into:

- Satisfaction level with media services and content standards;
- Media consumption habits; and
- Digital TV adoption and awareness.



2.2 Methodology

Sample:

- 1,727 Singapore Citizens and PRs, aged 15 to 65
- Survey used a nationwide sampling frame that was representative of the Singapore population aged 15 and above

Methodology:

- Surveys were carried out via face-to-face interviews, which lasted about 45 minutes each

Survey period:

- Fieldwork conducted during the period of August to November 2014

The study was conducted by the Degree Census Consultancy Pte Ltd.

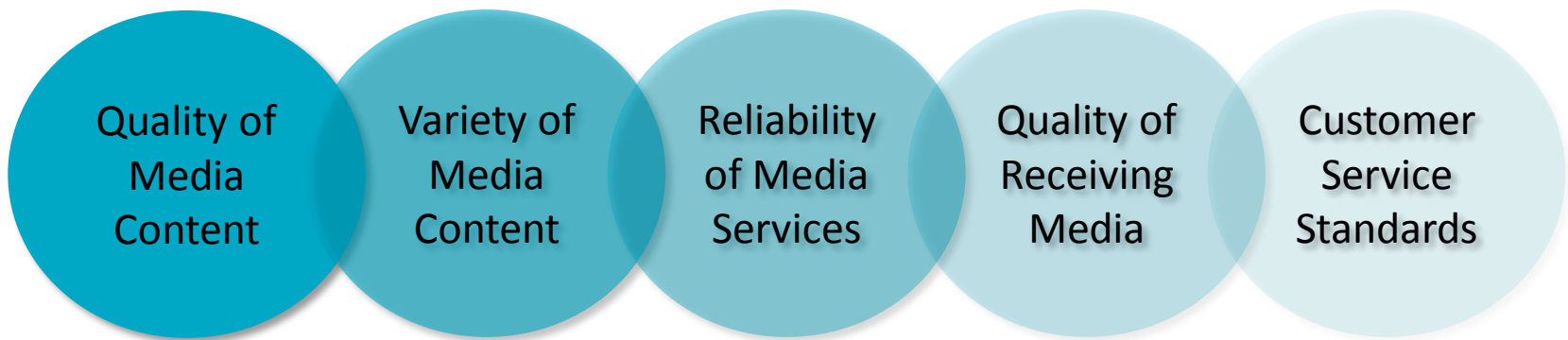
Note: Throughout this report, figures in **blue** indicate a statistically significant increase from the previous year, while figures in **red** indicate a statistically significant decrease.



3. Satisfaction Indexes

3.1 Overall Media Satisfaction Index

The Overall Media Satisfaction Index (OMSI) measures the population's satisfaction level with media services. The Index is made up of five components:



At **75.7%**, the OMSI is comparable to that of previous year's at 76.1%.

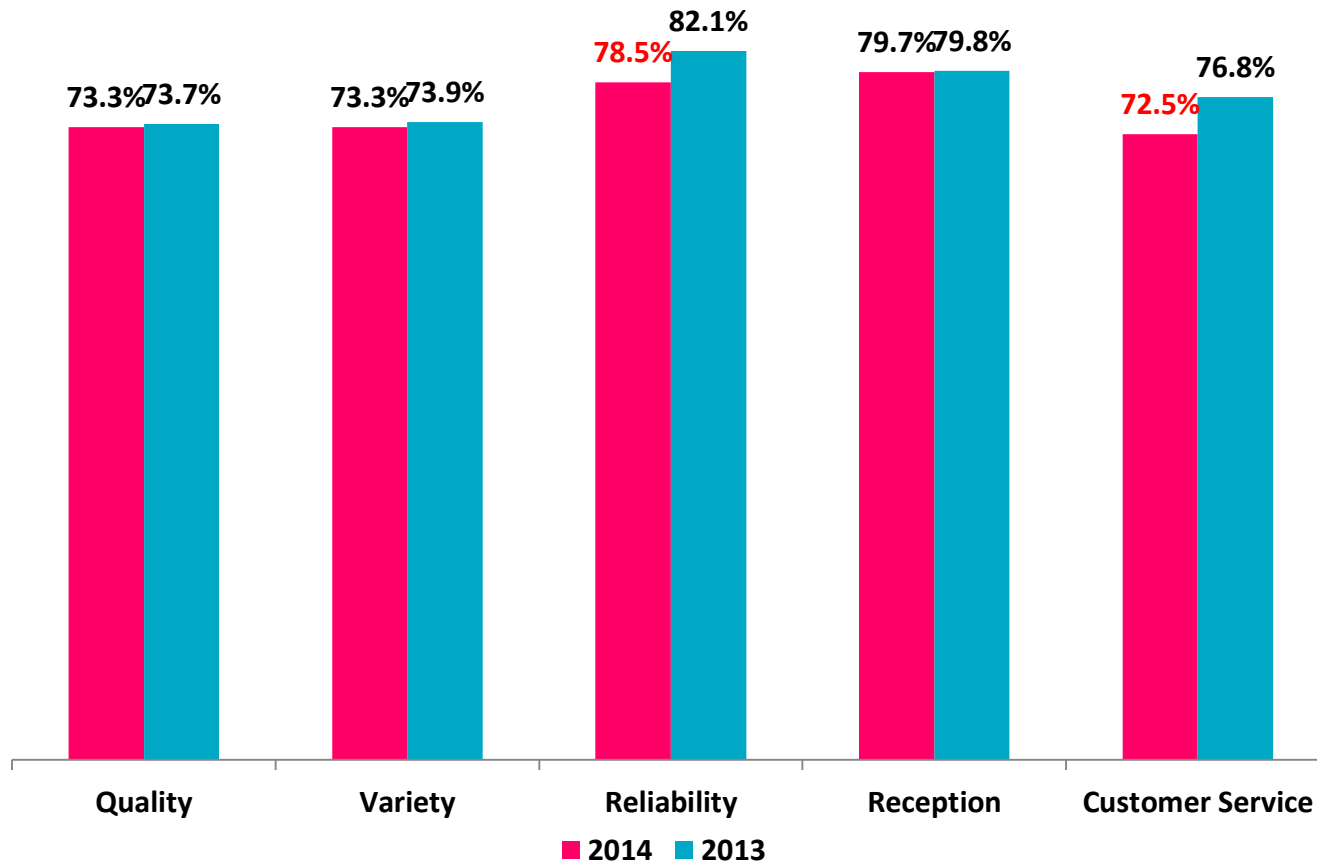
Note: The difference in the 2013 and 2014 OMSI is not statistically significant.



3.1 Overall Media Satisfaction Index

Satisfaction with reliability and customer service dipped in 2014

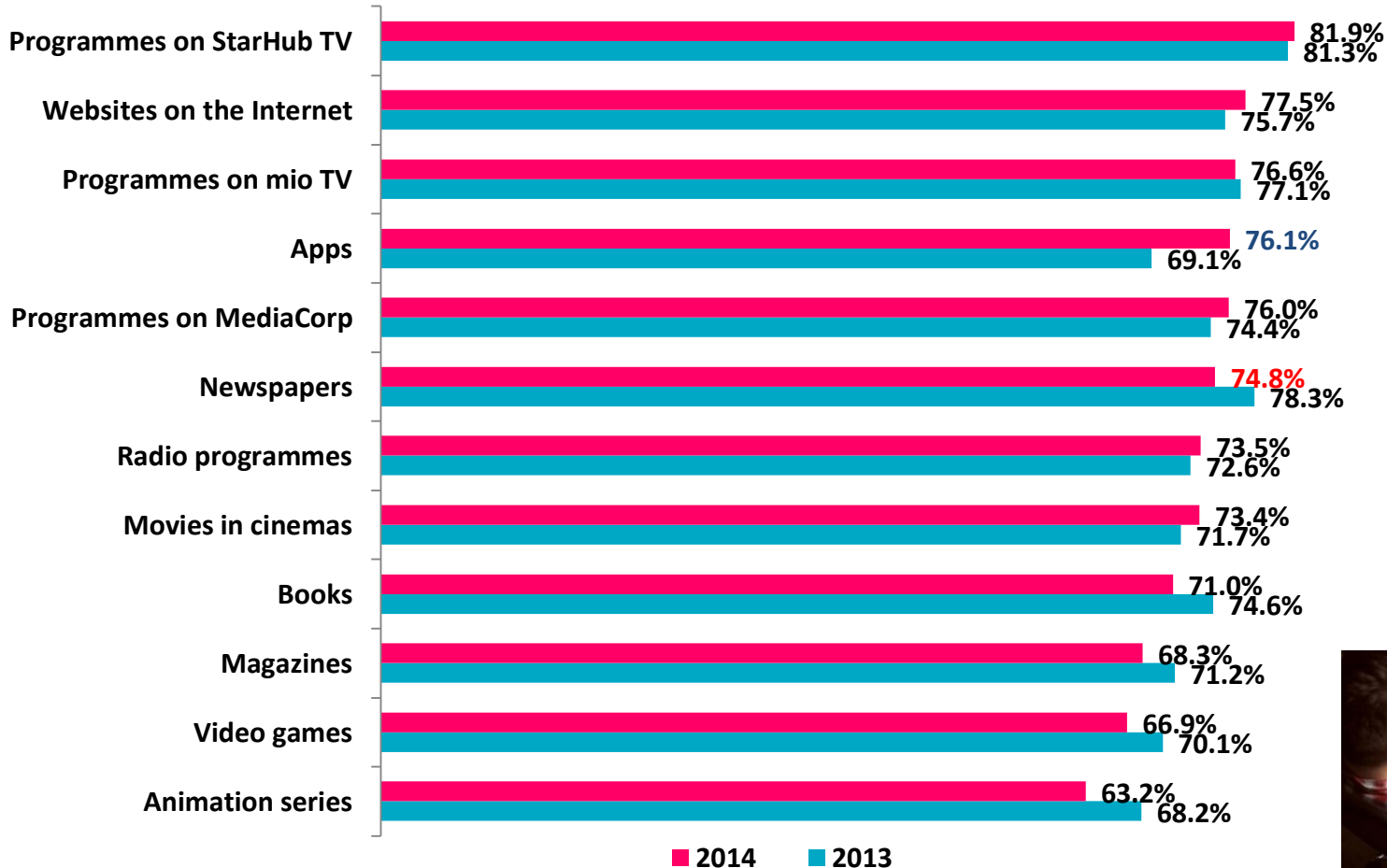
Consumer satisfaction with individual components of the OMSI



3.1 Overall Media Satisfaction Index

Consumers most satisfied with the quality of content on StarHub TV, followed by on websites and mio TV

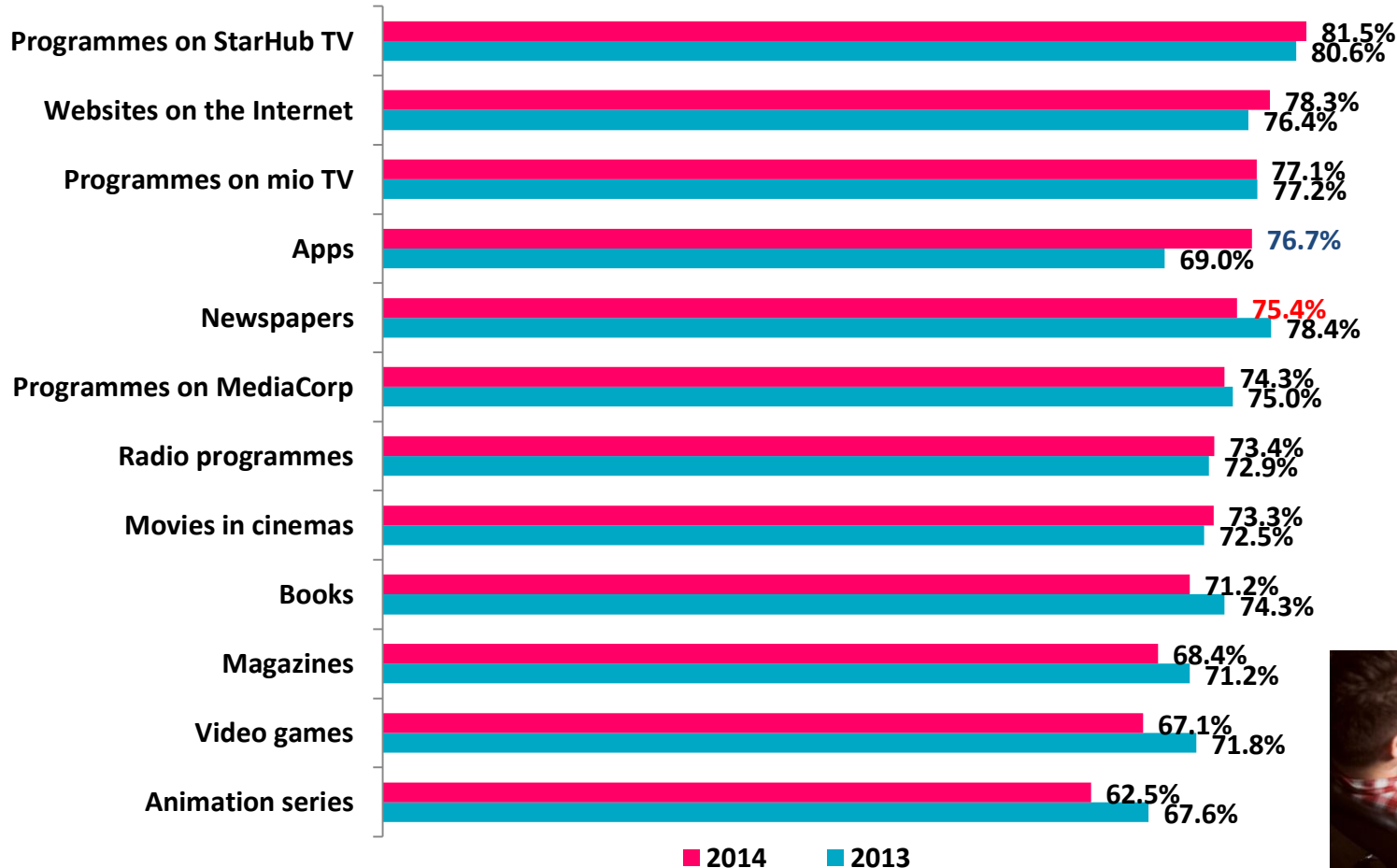
Satisfaction with Quality of Media Content



3.1 Overall Media Satisfaction Index

Consumers were also most satisfied with the content variety of StarHub TV, on websites and mio TV

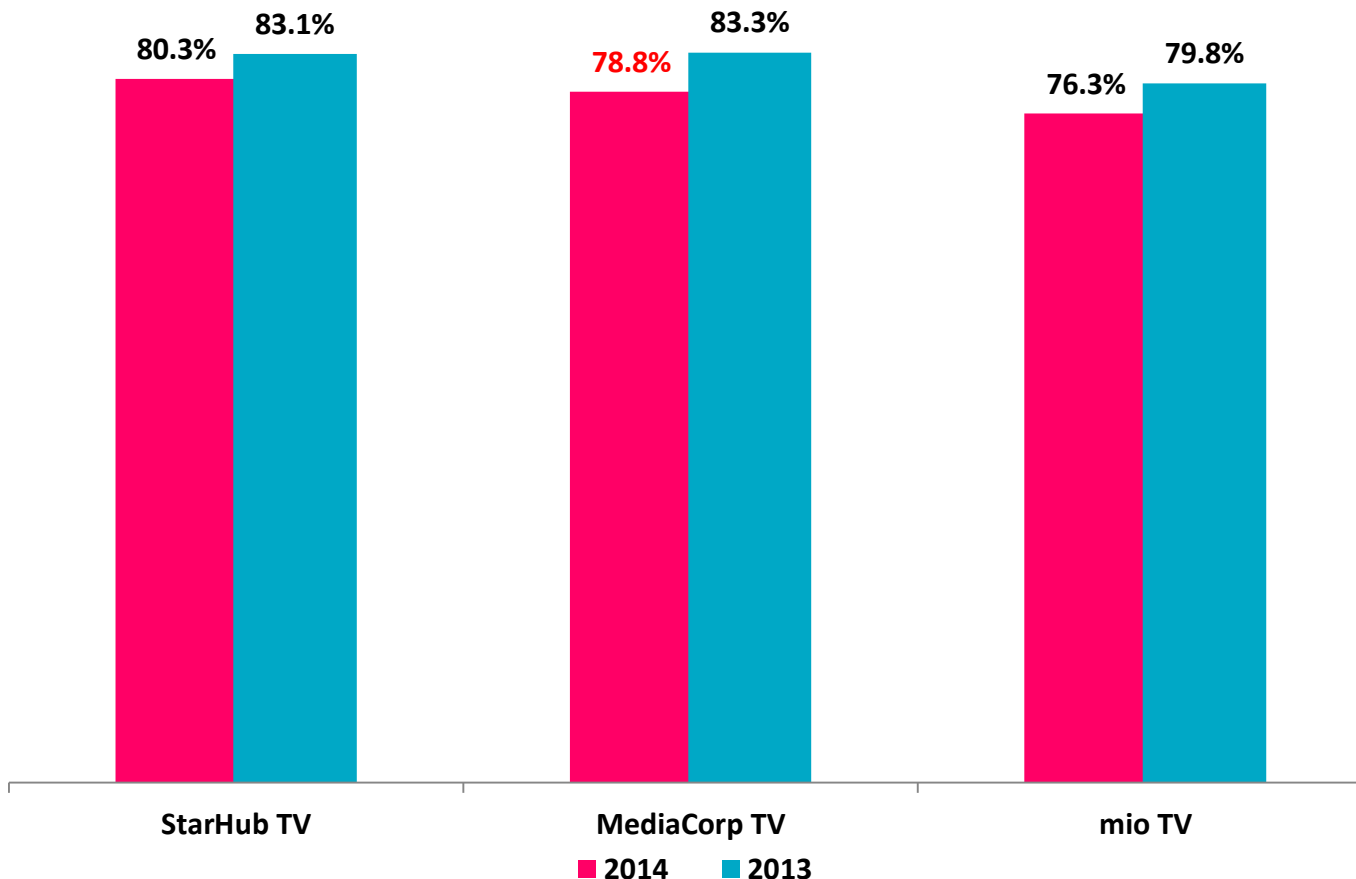
Satisfaction with Variety of Media Content



3.1 Overall Media Satisfaction Index

StarHub TV was the highest rated in media service reliability in 2014

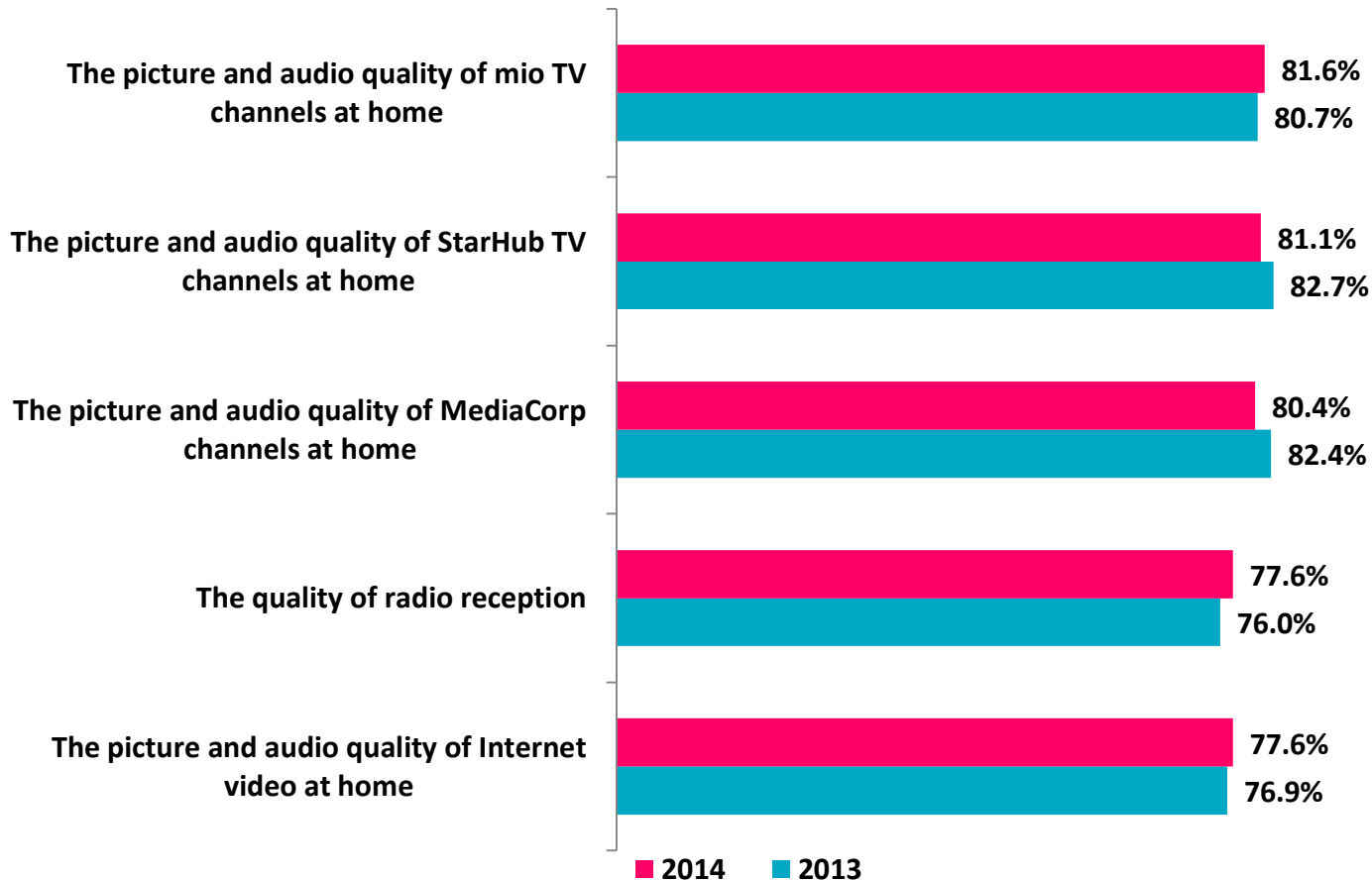
Mean Satisfaction Score with Reliability of Media Services



3.1 Overall Media Satisfaction Index

Satisfaction with quality of receiving media for radio and Internet catching up with that for TV

Satisfaction with Quality of Receiving Media



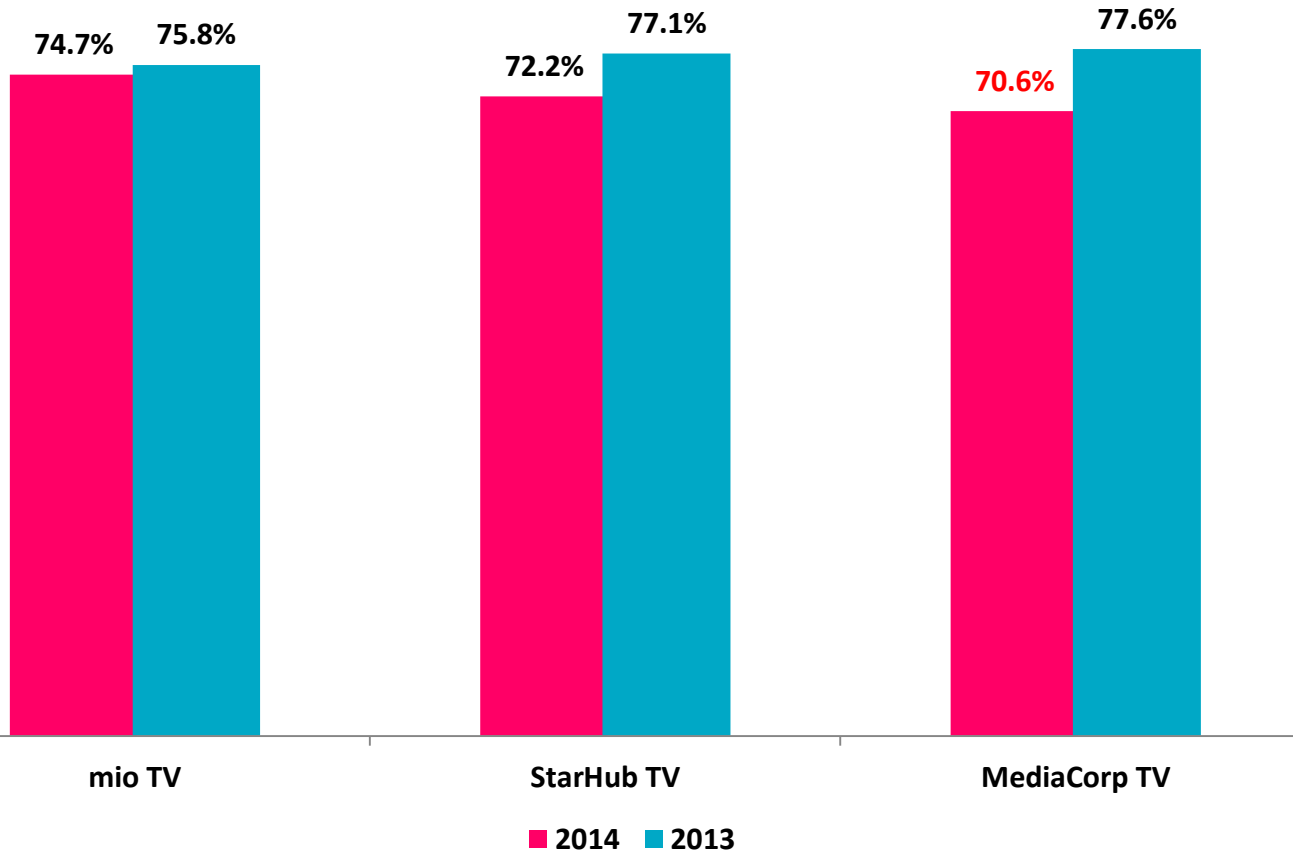
Note: Audio quality refers to the synchronisation of programme and sound, and distortions to sounds from the programme.



3.1 Overall Media Satisfaction Index

General decrease in satisfaction with broadcasters' customer service

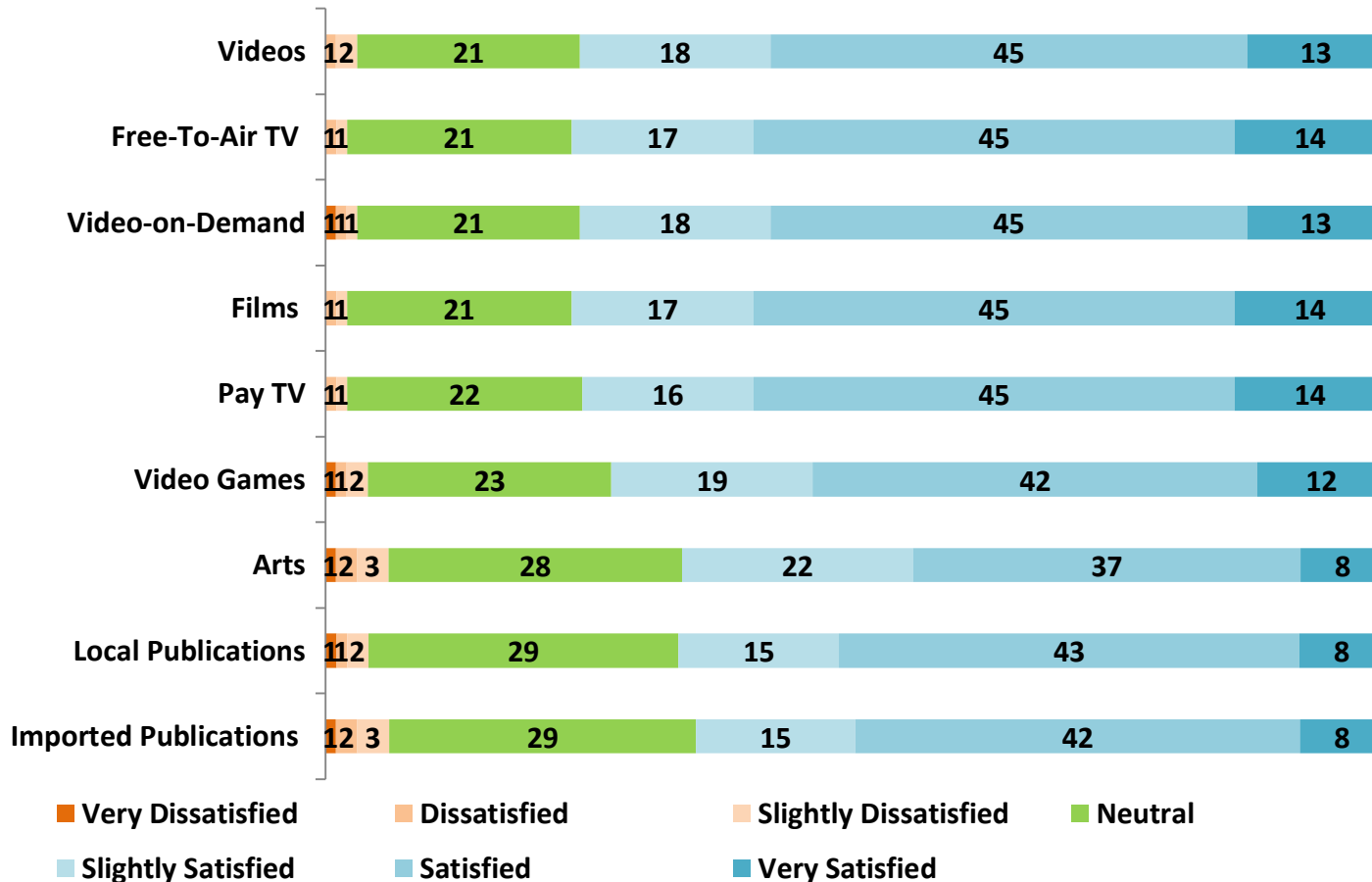
Mean Satisfaction Score with Customer Service Standards



3.2 Content Standards Satisfaction Index

Overall Content Standards Satisfaction Index was 72.4% in 2014

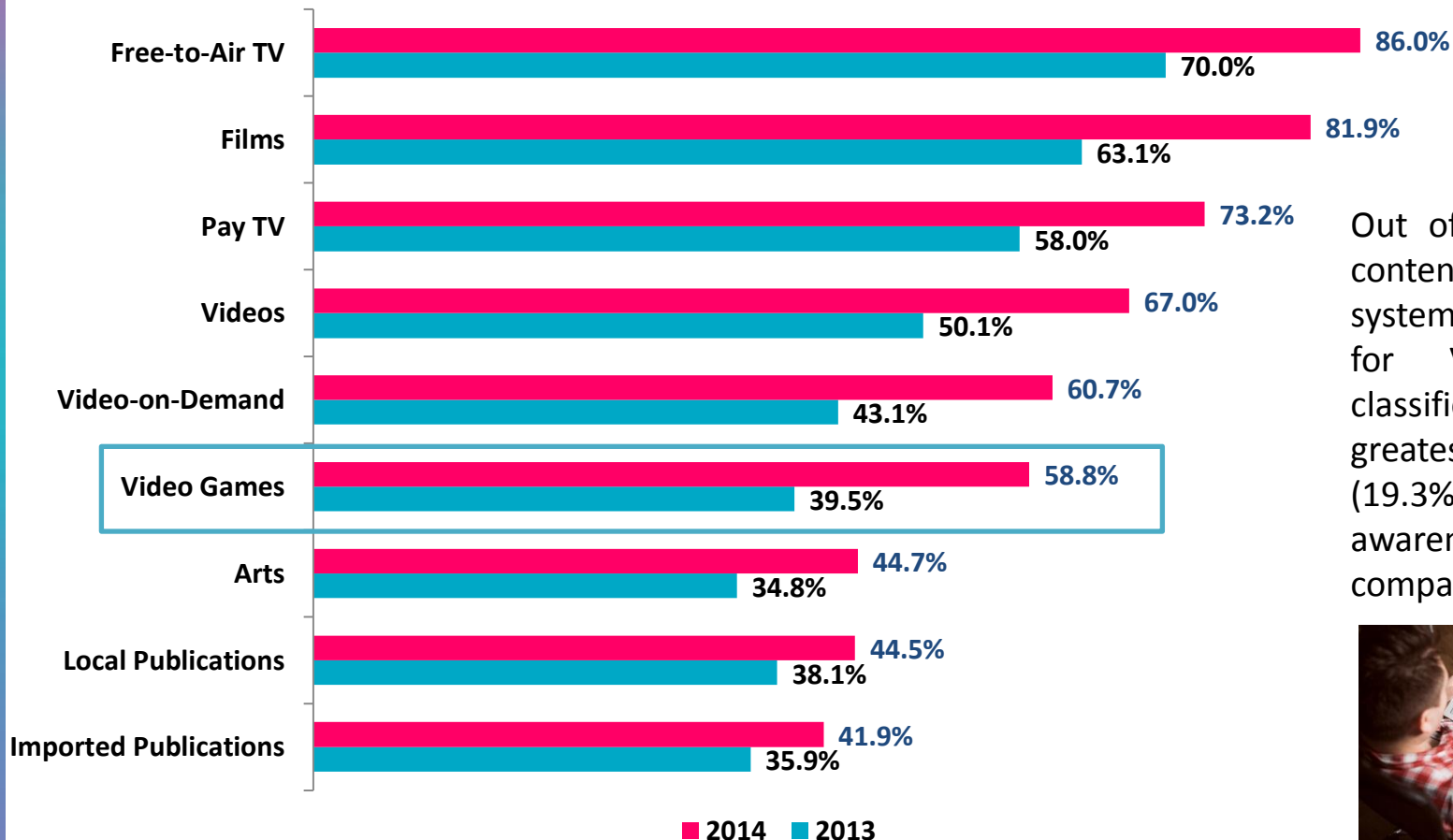
Personal Satisfaction with Content Classification System



3.2 Content Standards Satisfaction Index

Awareness of Content Classification Systems increased across all platforms

Awareness of Content Classification Systems



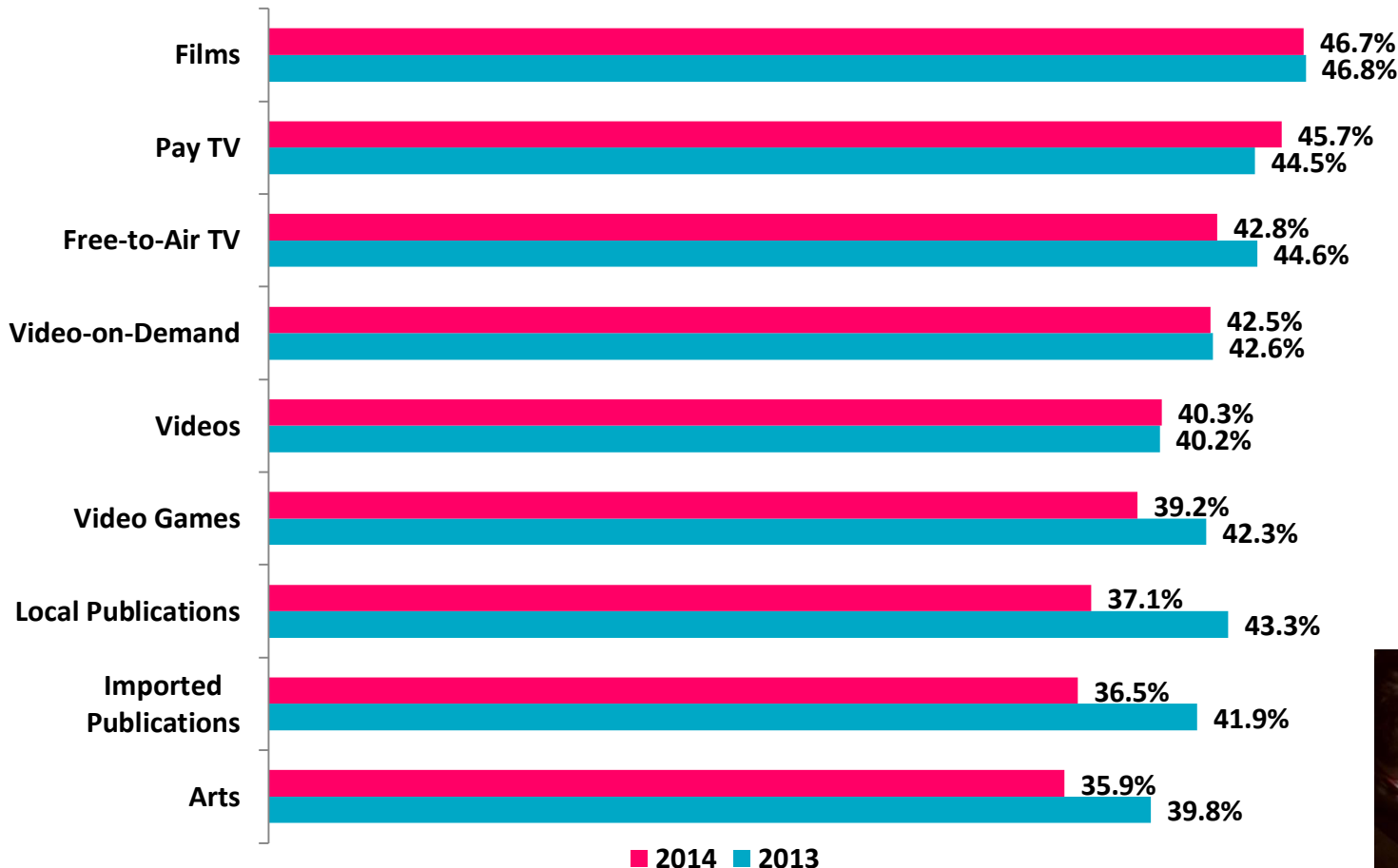
Out of the different content classification systems, awareness for Video Game classification saw the greatest increase (19.3% increase in awareness when compared to 2013).



3.2 Content Standards Satisfaction Index

Around 4 in 10 consumers who were aware of the Systems also used them for decision making

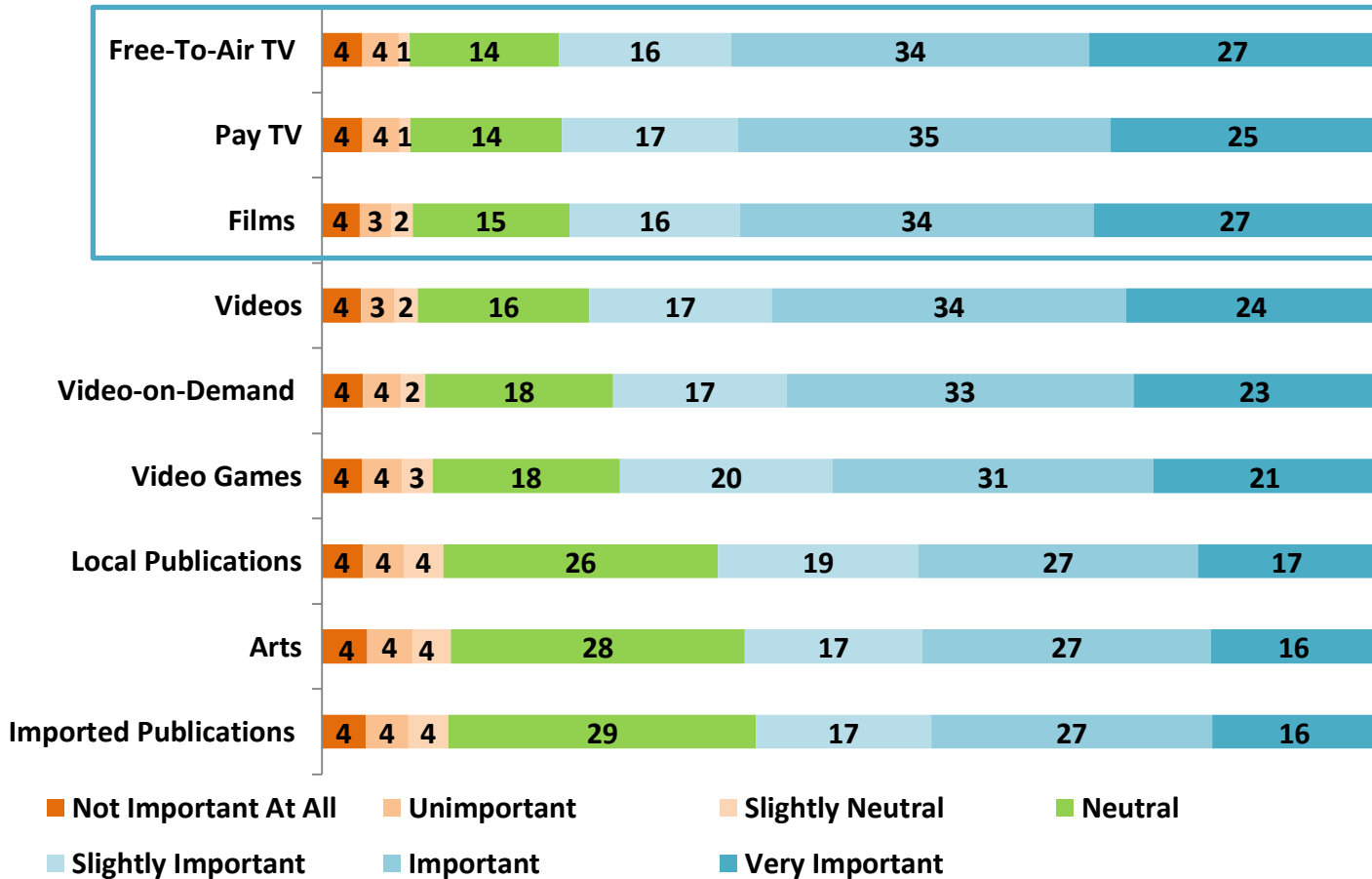
Usage of Content Classification Systems



3.2 Content Standards Satisfaction Index

Overall, consumers felt that it is most important to classify FTA TV, Pay TV and Film content

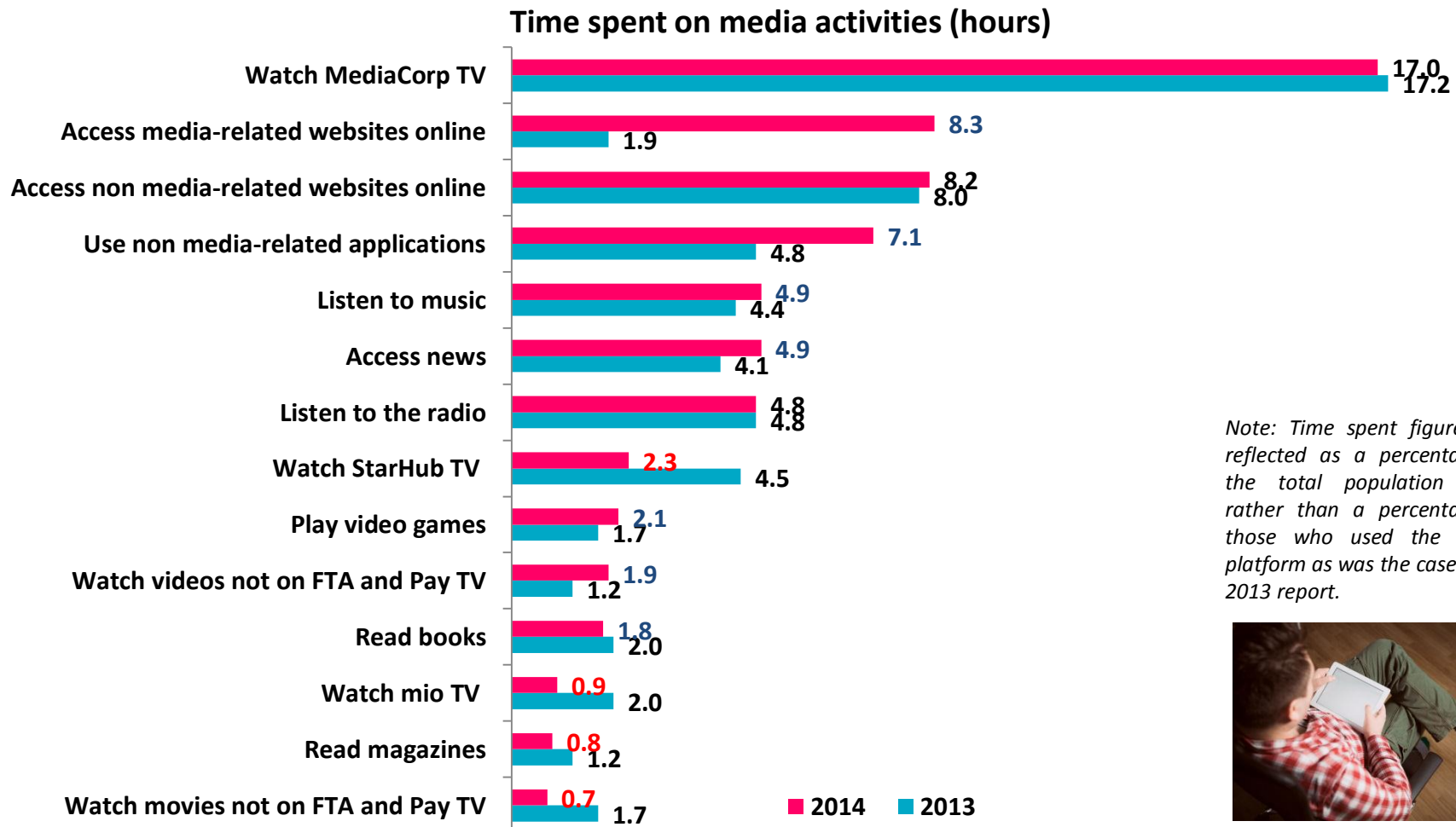
Importance of Content Classification System



4. Media Consumption Habits

4.1 Time Spent on Media Activities

On average, respondents spent 17 hours weekly watching Free-to-Air TV



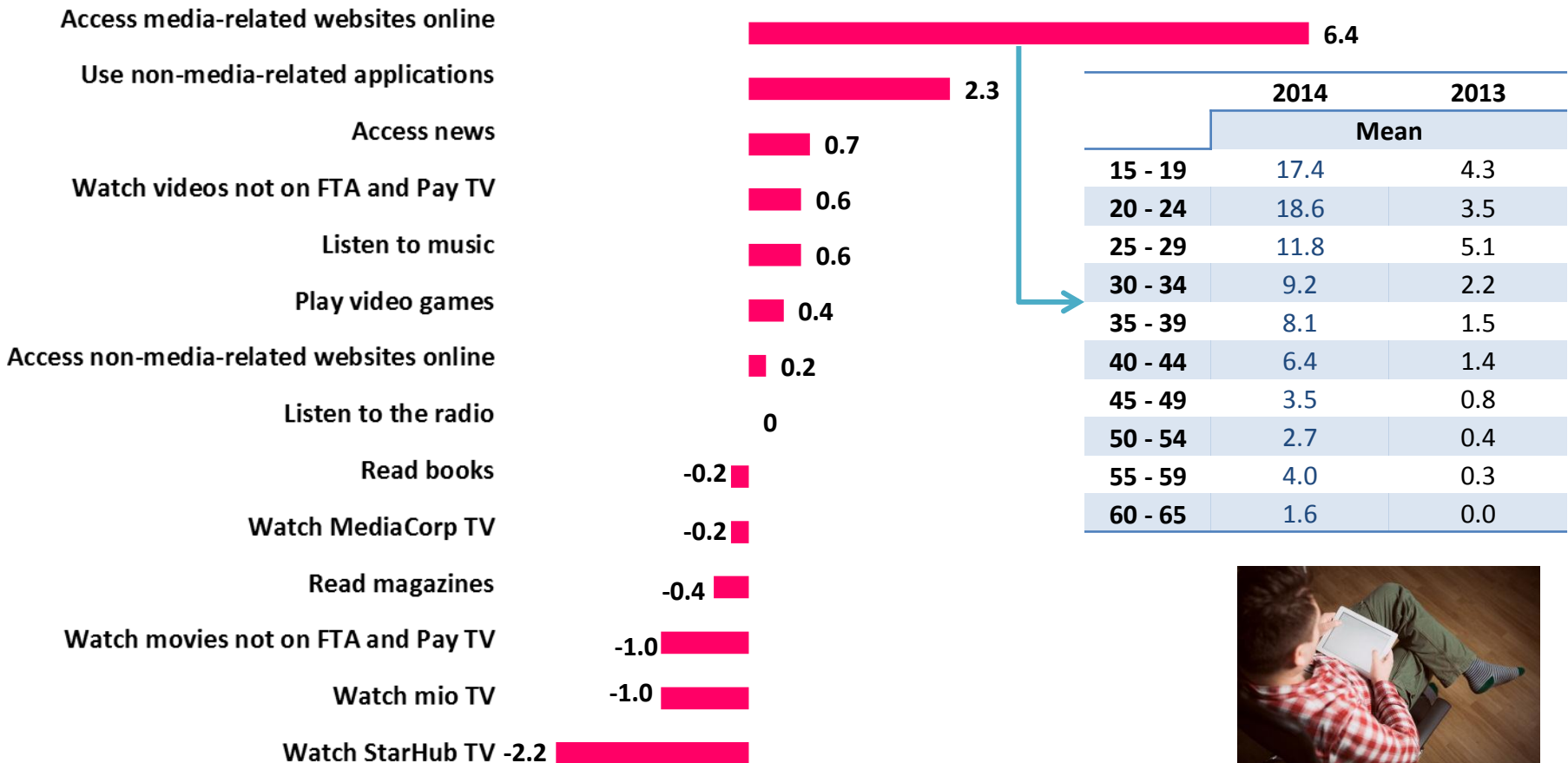
Note: Time spent figures are reflected as a percentage of the total population base, rather than a percentage of those who used the media platform as was the case in the 2013 report.



4.1 Time Spent on Media Activities

Statistically significant increase in time spent on media-related websites across all age groups

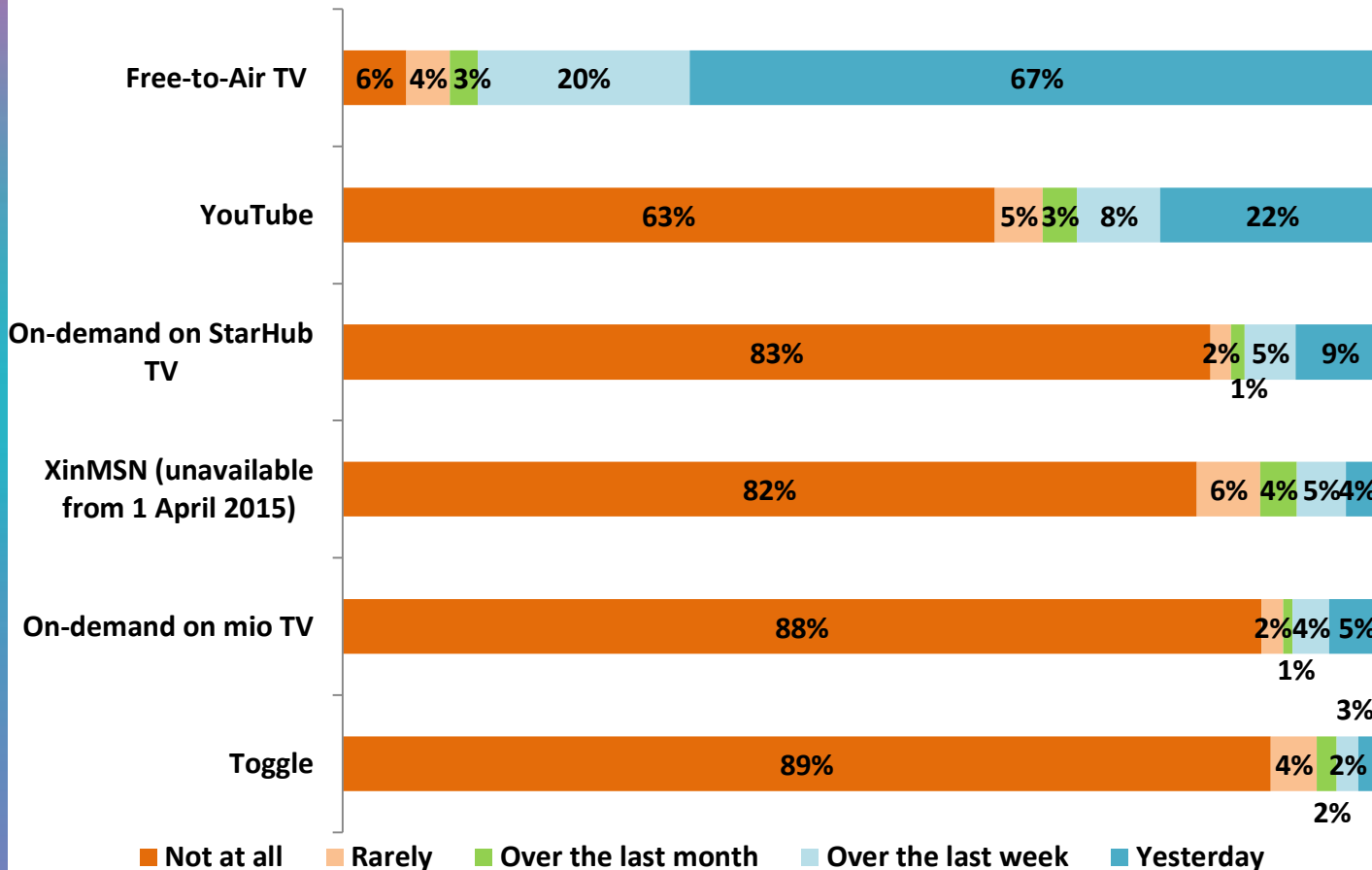
Difference in time spent between 2013 and 2014 (hours)



4.2 Free-to-Air TV and Radio

89.7% of respondents watched MediaCorp TV at least monthly; Toggle viewership tripled in the past year

Platforms used to watch MediaCorp TV programmes



Respondents who did not watch MediaCorp on Free-to-Air TV were mostly aged 15 to 19 years old.

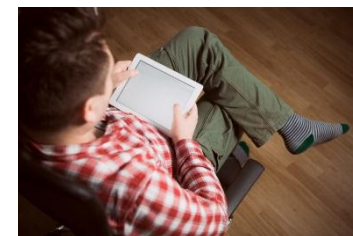
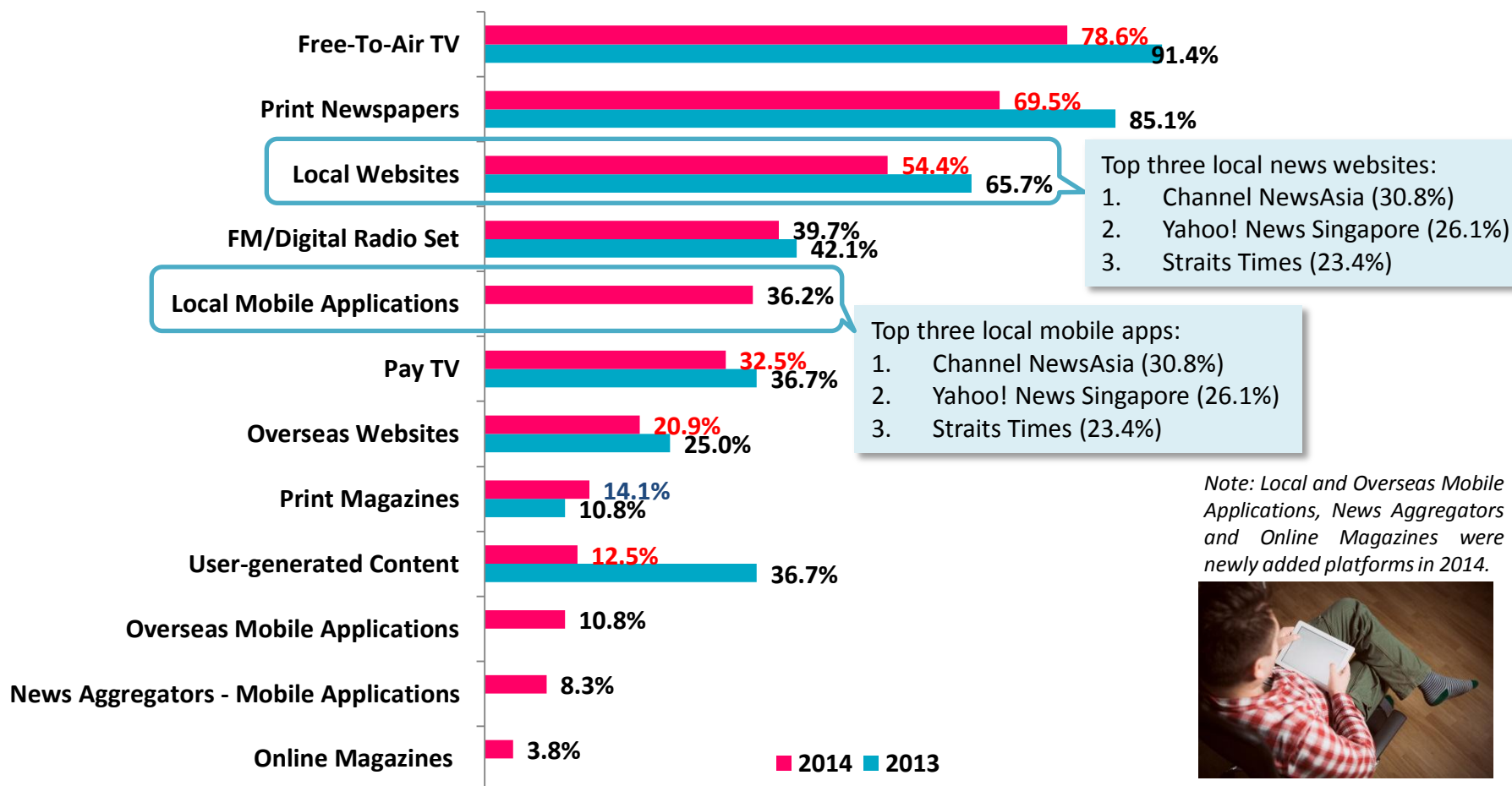
However, the same group of respondents also tend to watch Toggle at least once a month.



4.2 Free-to-Air TV and Radio

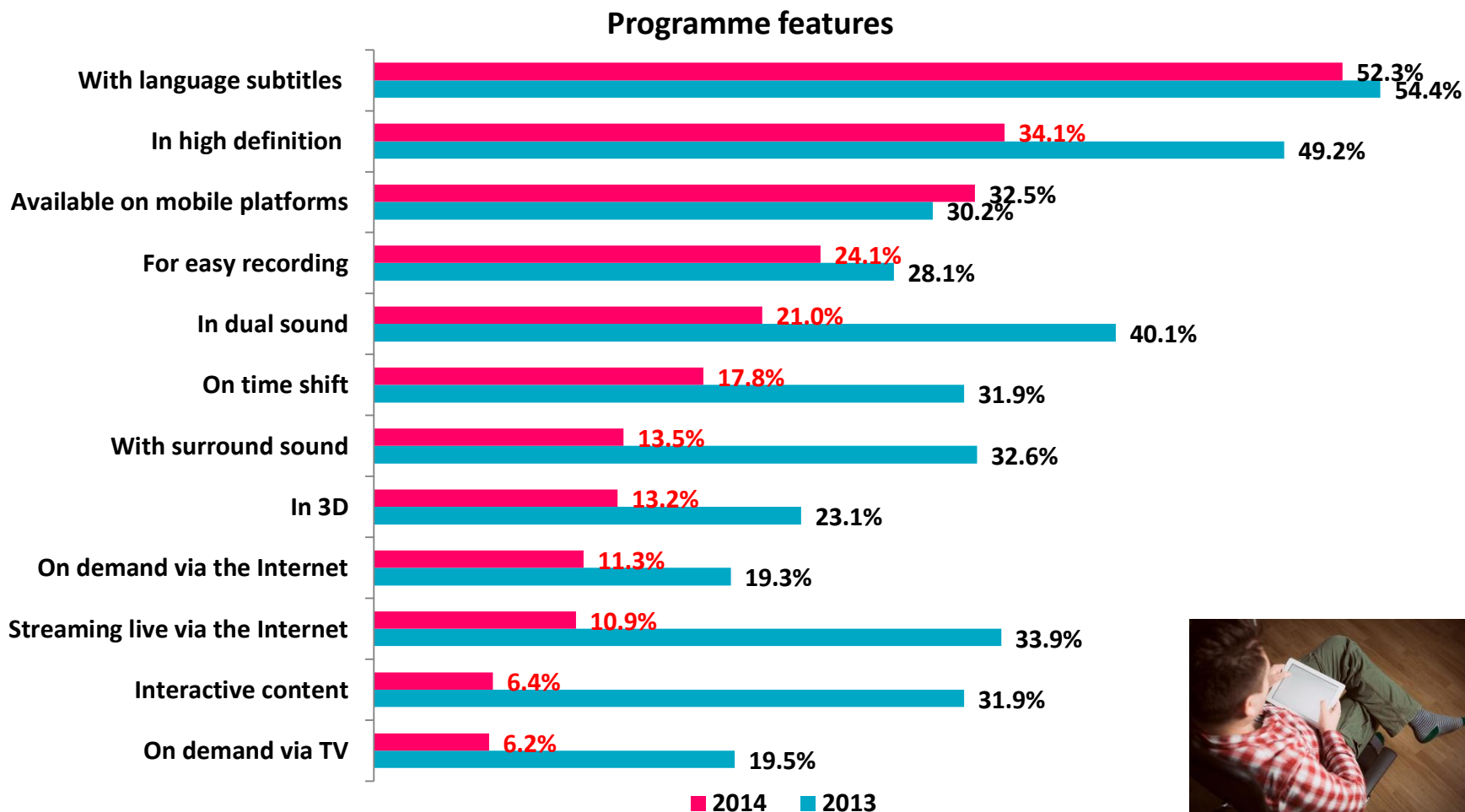
FTA TV remains the top source of Singapore-related news, even as news consumption declines in general

Platforms used for Singapore-related news



4.2 Free-to-Air TV and Radio

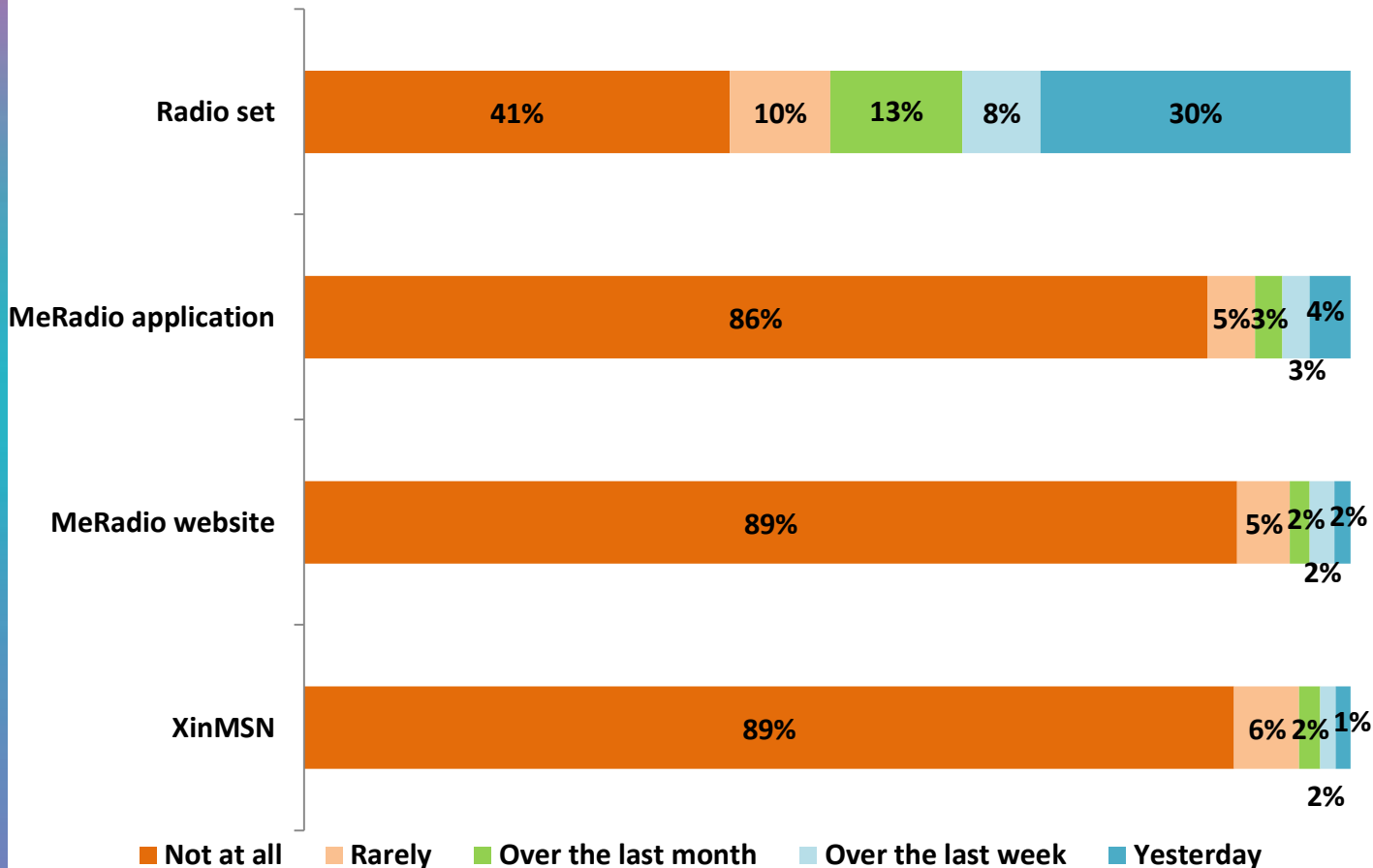
Language subtitling would encourage people to start watching and to watch more MediaCorp TV



4.2 Free-to-Air TV and Radio

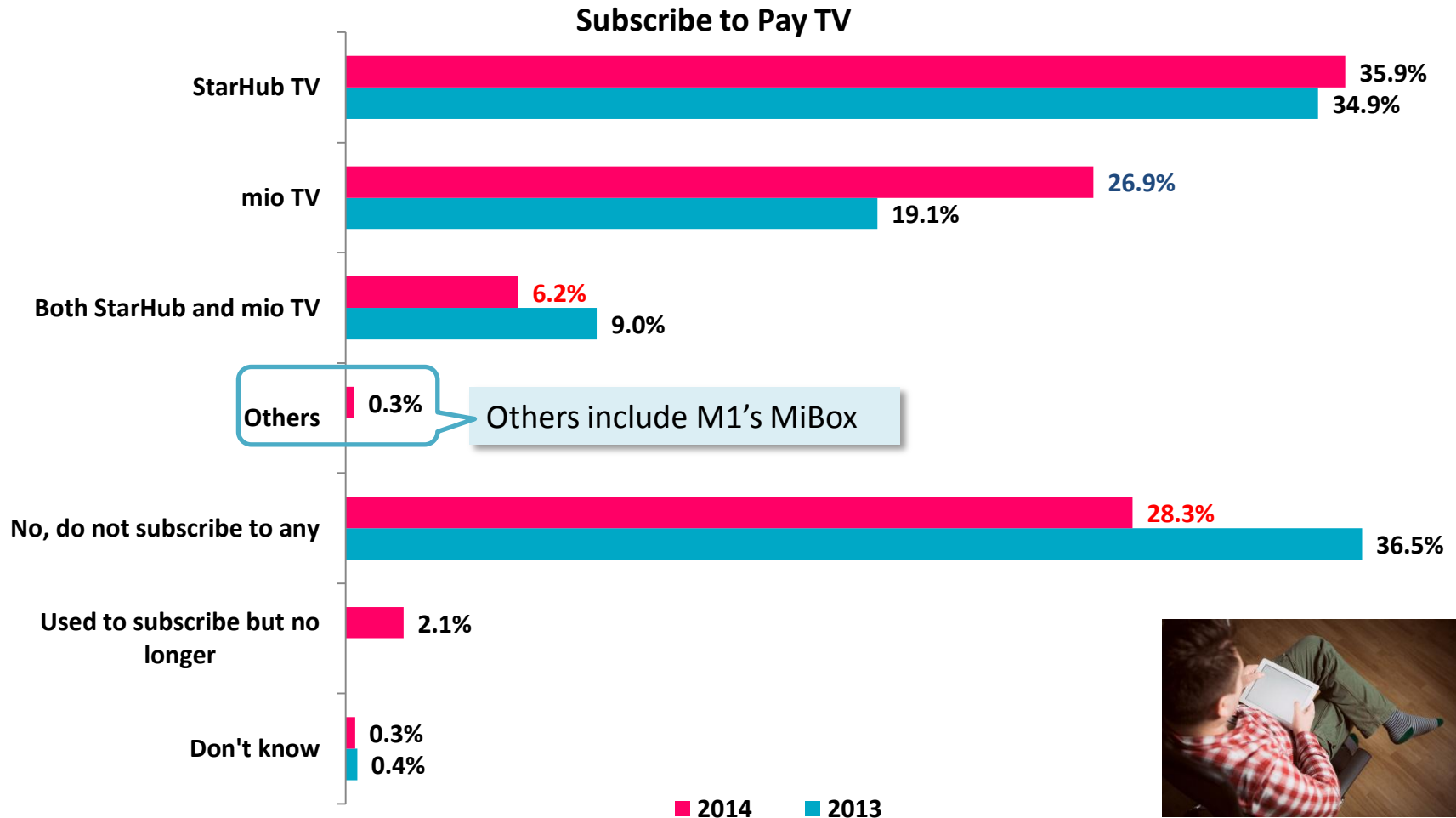
More people are tuning online although using a radio set is still most popular way for radio listening

Platforms used to listen to MediaCorp radio



4.3 Pay TV

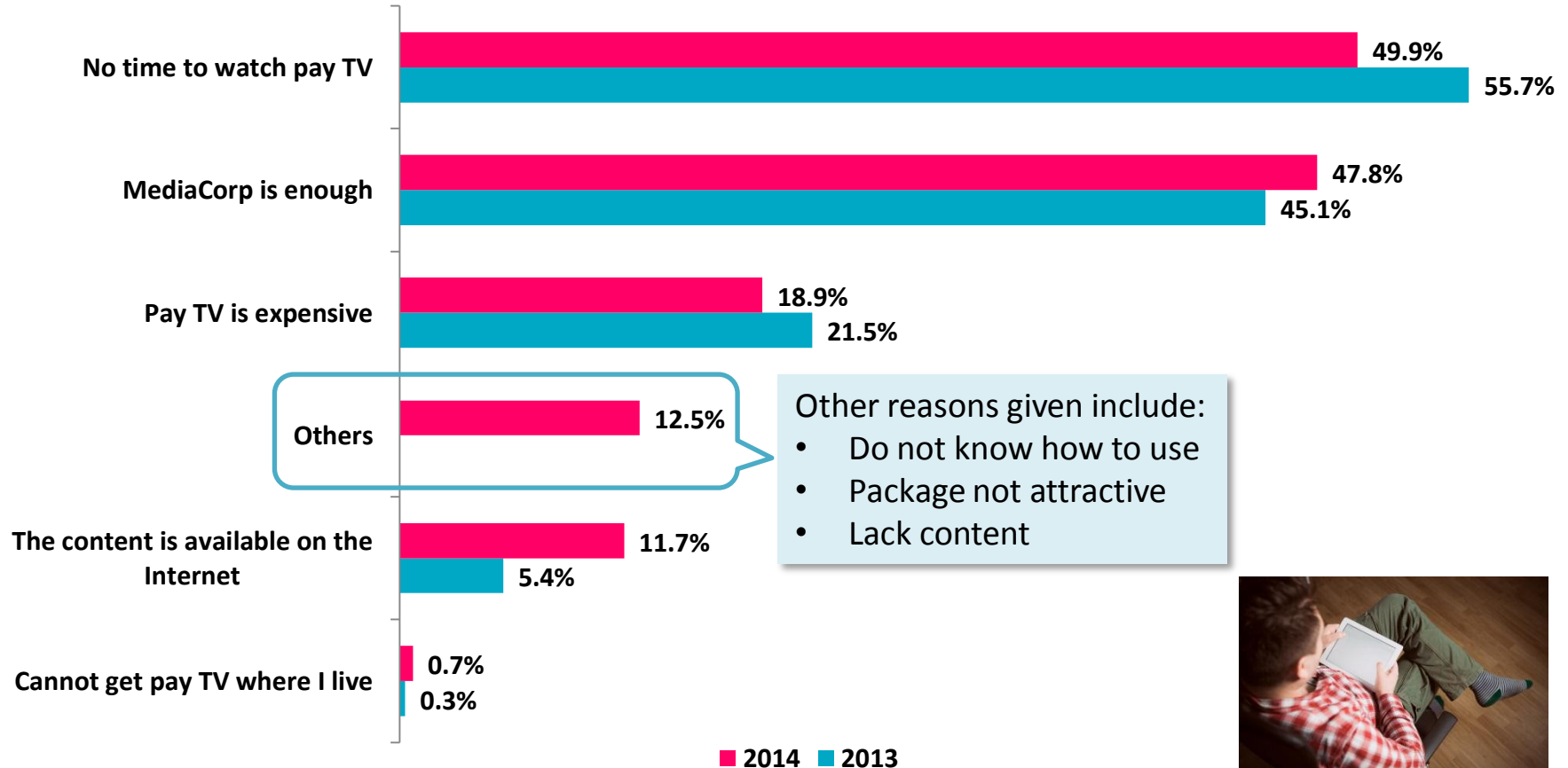
Pay TV take-up rates improved over the past year, while dual subscriber rates have dropped



4.3 Pay TV

Lack of time remains the top reason for not subscribing to pay TV

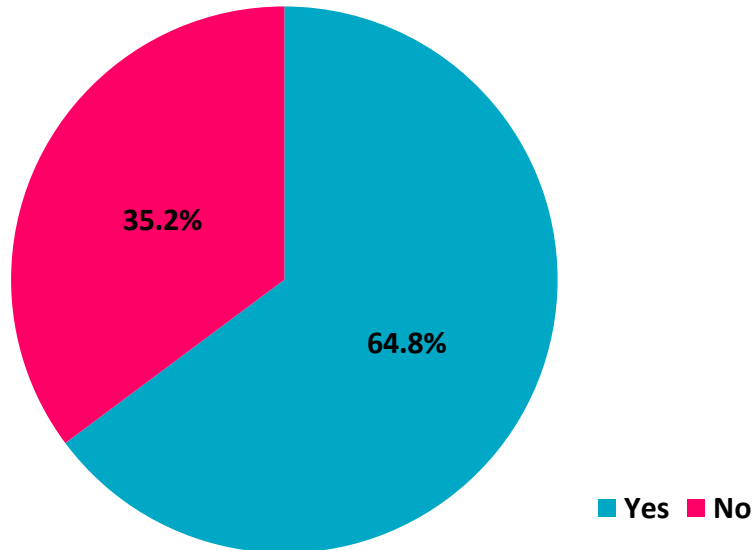
Reasons for not subscribing to Pay TV



4.4 Multitasking Behaviour

Majority of respondents used multiple devices at the same time

Used multiple devices at the same time



Mobile phone usage featured strongly in multitasking behaviour, and using the mobile phone to text or call was the top concurrent activity when multitasking.

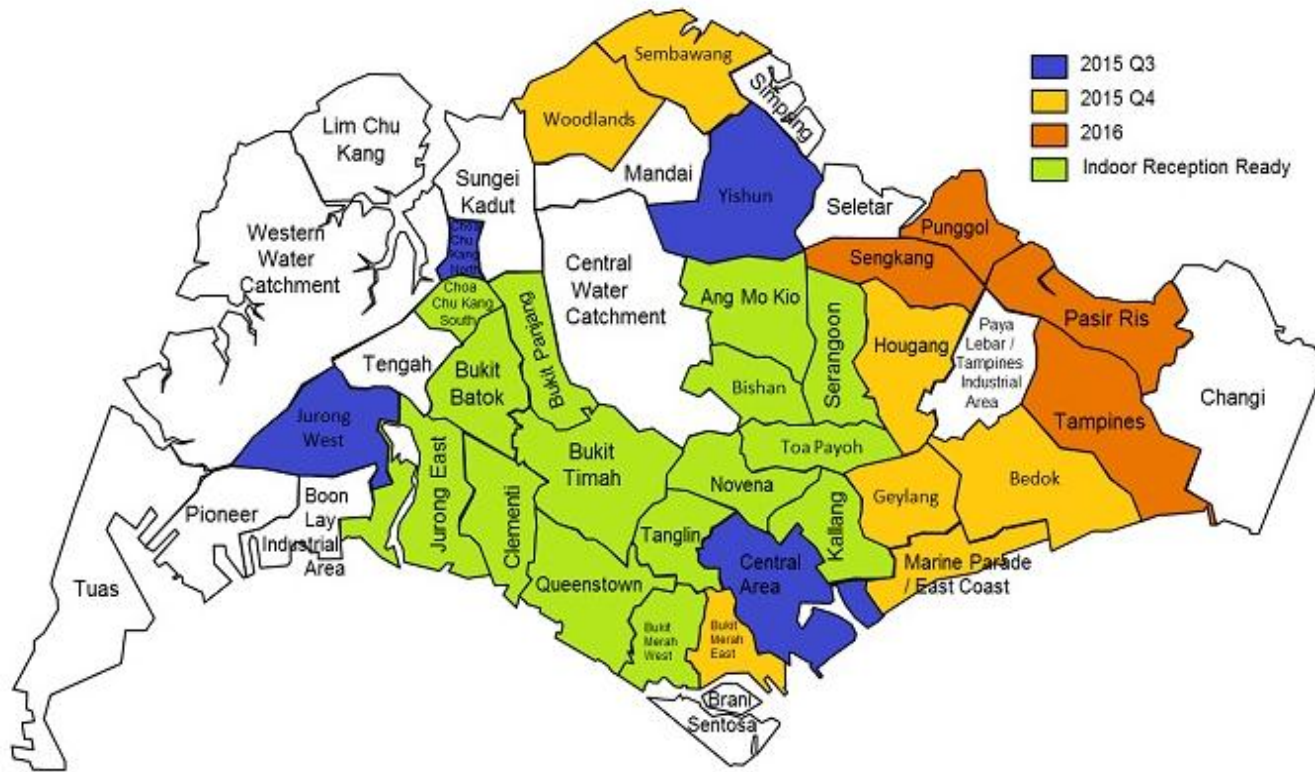
Primary activity	Secondary activity	Proportion of time
Watching TV	Using mobile phones to text/ call	46.7%
Using mobile phones to text/ call	Watching TV	34.6%
Using Internet on mobile devices	Using mobile phones to text/call	23.5%



5. Digital TV

5. Digital TV

Digital TV has been implemented in 15 estates, with 41% of households now able to receive digital signals



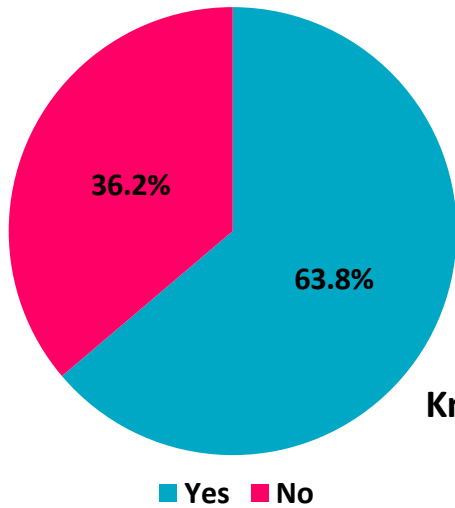
Note: Information accurate as of 13 July 2015



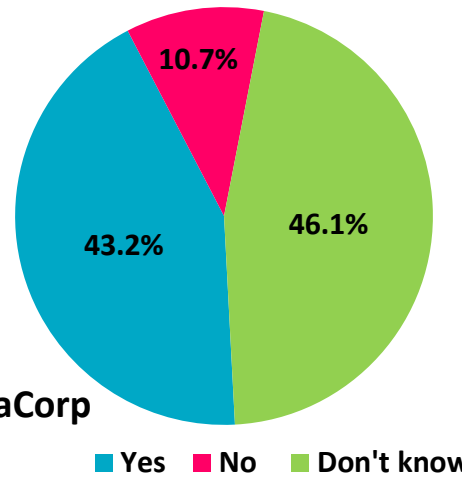
5. Digital TV

Two-thirds of consumers were aware that MediaCorp TV channels are broadcasted in digital format

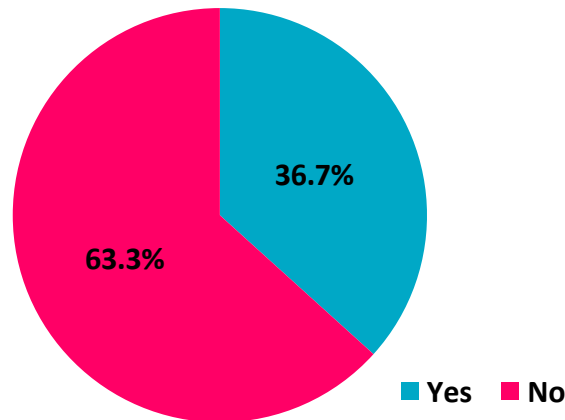
Aware of digital broadcasting



Ability to watch MediaCorp digital TV



Knowledge to receive MediaCorp digital HD channels




Around two-thirds of respondents did not know how to receive MediaCorp digital HD TV channels.

43.2% were able to watch MediaCorp digital TV channels.



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