

Zero-to-Fourteen Consumer Experience Study 2014

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1. Executive Summary

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Media Consumption Habits

- Time spent on media activities increased with the children's age. The top three media activities were watching MediaCorp TV, watching Pay TV on TV sets, and playing video games on their mobile phones
- While TV viewing continues to be a family activity, children spent more time on media activities alone as they grow older
- Children aged 10 and below watched Okto most frequently, while children aged 11 to 14 preferred Channel 5 and Channel 8
- Disney Junior was the most watched Pay TV channel amongst children aged 0 to 6, while the older children preferred the Disney Channel

Online Usage Habits

- More than three quarters of the children have gone online
- Most accessed the Internet at home for at least four days a week using a smart phone

Social Media Usage and Habits

- Half of the children surveyed used social media networks, with most aged between 11 and 14 years old
- Most used smart phones to access social media networks
- Facebook was the most popular social media platform, followed by YouTube and Twitter



2. Introduction

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The Zero-to-Fourteen Media Consumer Study was conceptualised as a complementary study to MDA's Media Consumer Experience Study, with a targeted focus on the media consumption habits of children from birth to fourteen years of age.

This study is intended to provide up-to-date data about children's media habits, to shed light on the important role of the media in the lives of children in Singapore.

This is the first time MDA is conducting this study. MDA intends to conduct this study annually to keep abreast of the changing media consumption habits of Singapore children.



2.1 Research Objectives

The study aims to find out:

- **Take Up of Media** – The amount of time children spend on traditional and new media platforms, and the devices used to access new media.
- **Use of Media** – The types of activities and content children engage in using traditional and new media platforms.
- **Social Media Habits** – The prevalence of the use of social media among children, and the different social media networks used.



2.2 Methodology

Sample:

- 1,200 Singapore Citizens and PRs, aged 0 to 14
- Parents answered on behalf of the children aged 0 to 6
- Survey used a nationwide sampling frame that was representative of the Singapore population aged zero to 14

Methodology:

- Surveys were carried out via face-to-face interviews, which lasted about 30 minutes each

Survey period:

- Fieldwork conducted during the period of November to December 2014

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



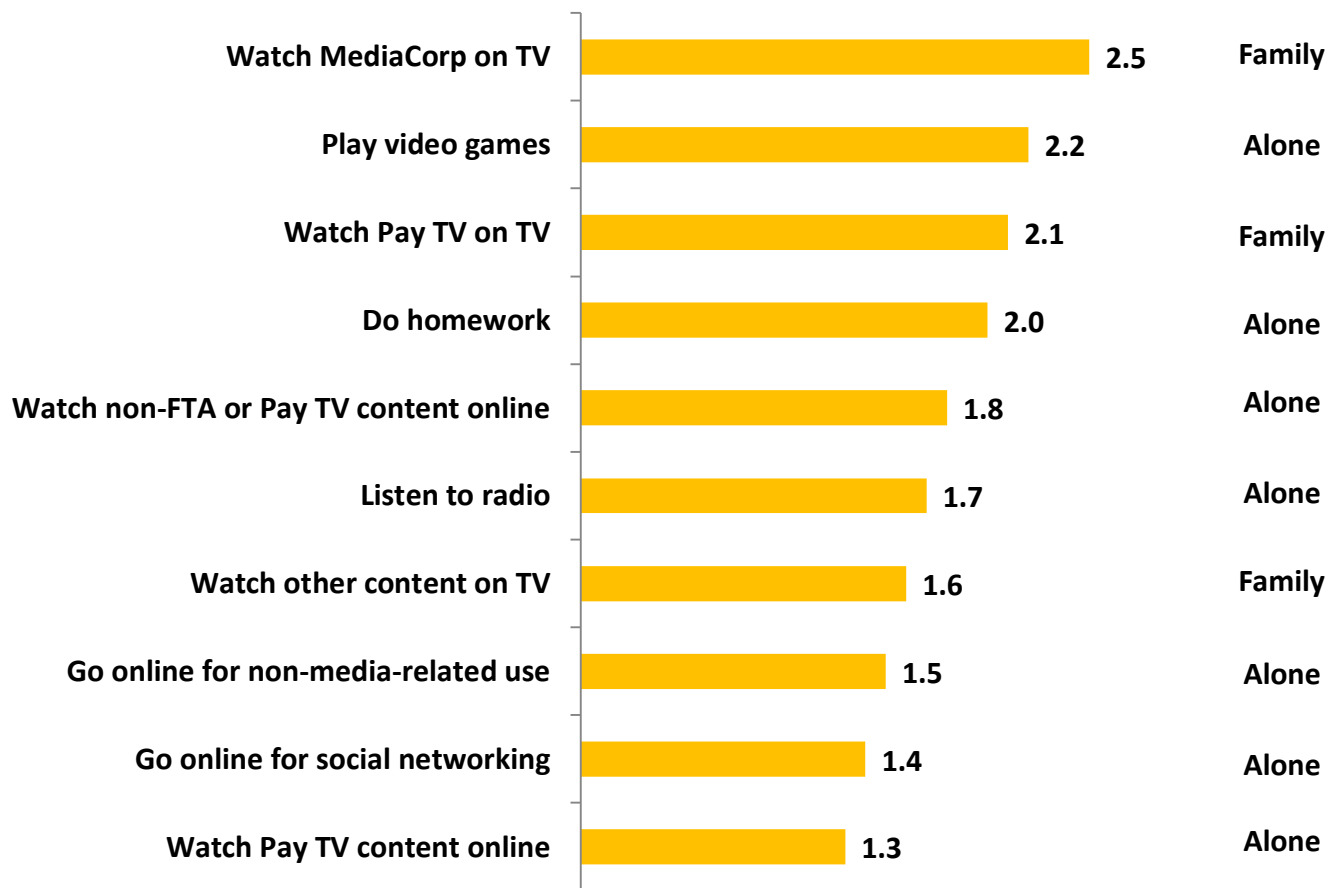
3. Media Consumption Habits

3.1 Time Spent on Media Activities

Children spent an average of 4.7 hours daily on media activities; Half the time was spent watching MediaCorp TV

Average daily time spent on media activities (hours)

Accompanied by:



While children were watching linear FTA TV and Pay TV with their family, playing video games was most frequently done alone.

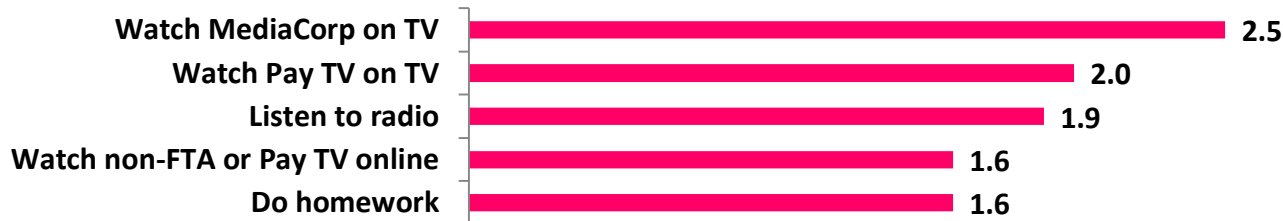
Note: The chart shows the average amount of time children spent on each activity daily, and if the activity is usually performed alone, or with someone else.



3.1 Time Spent on Media Activities

Time spent on media activities increases with age; older children spent most time playing video games

Top media activities by children aged 0-6 (hours)



Top media activities by children aged 7-10 (hours)



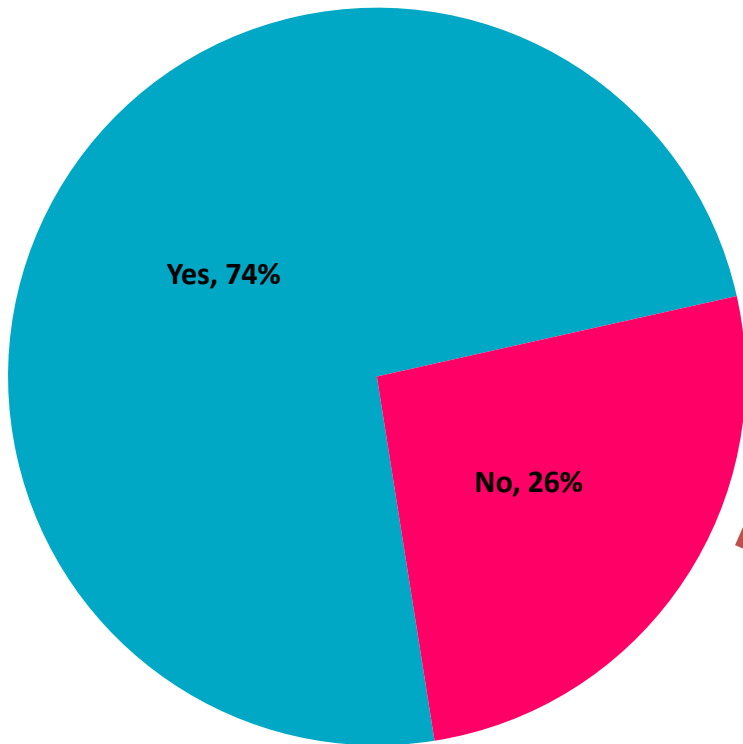
Top media activities by children aged 11-14 (hours)



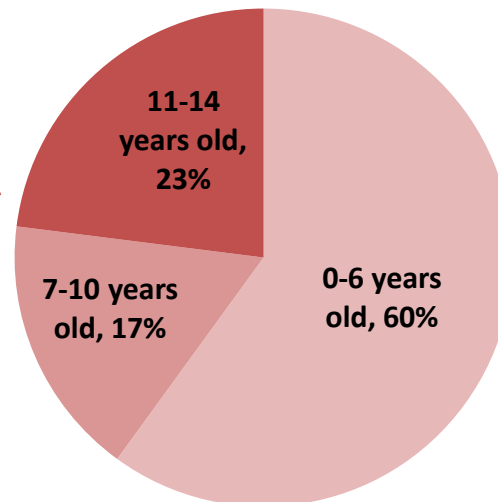
3.2 Free-to-Air TV

Around three-quarters of respondents watched MediaCorp TV

Watch MediaCorp TV



Do not watch MediaCorp TV

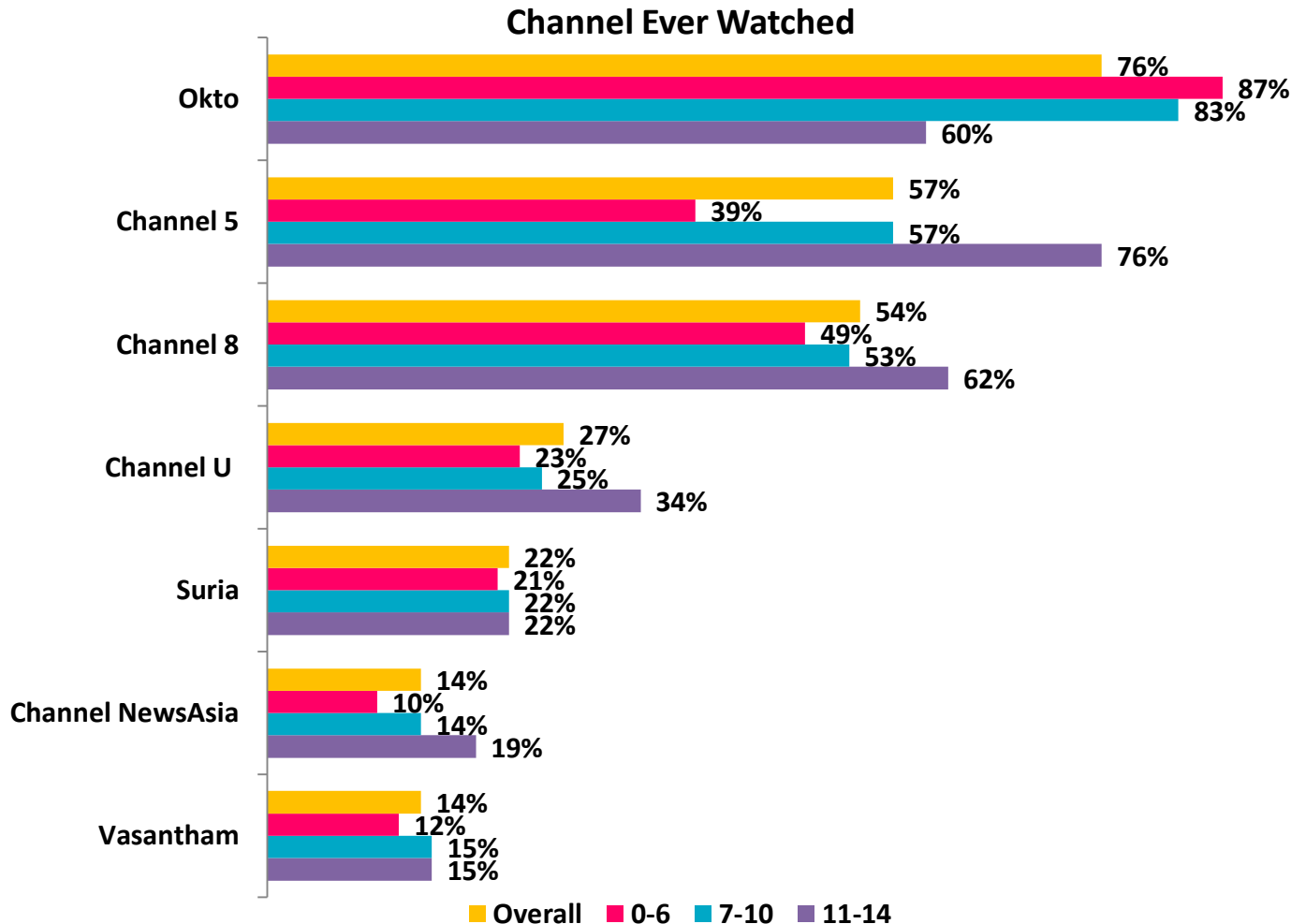


Majority of the children who do not watch MediaCorp TV were aged 0 to 6.



3.2 Free-to-Air TV

Most respondents have watched Okto, Channel 5 and Channel 8



Okto was the most watched channel amongst children aged 10 and below.

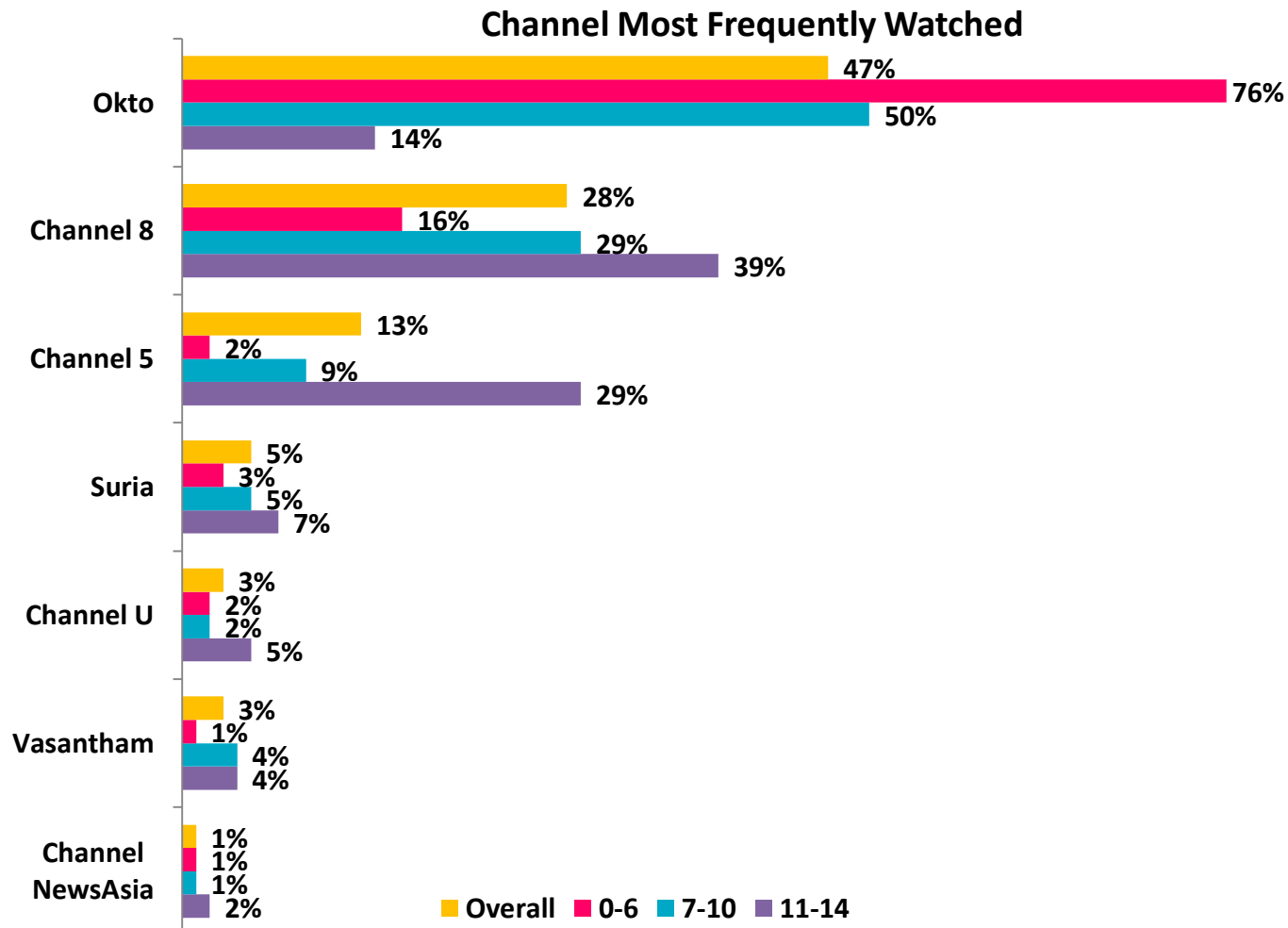
Children started watching other MediaCorp TV channels as they got older.

Note: Respondents were children who watched MediaCorp channels on the television or the Internet.



3.2 Free-to-Air TV

Okto, Channel 5 and Channel 8 were also the most frequently watched channels amongst children



Okto was also the most frequently watched channel amongst children aged 10 and below, while Channel 8 and Channel 5 were more frequently watched by children aged 11 to 14.

Note: Respondents were children who watched MediaCorp channels on the television or the Internet.



3.2 Free-to-Air TV

Newer shows and better programming on Pay TV was the top reason for not watching MediaCorp TV

Table 5: Reasons for seldom / not watch MediaCorp TV

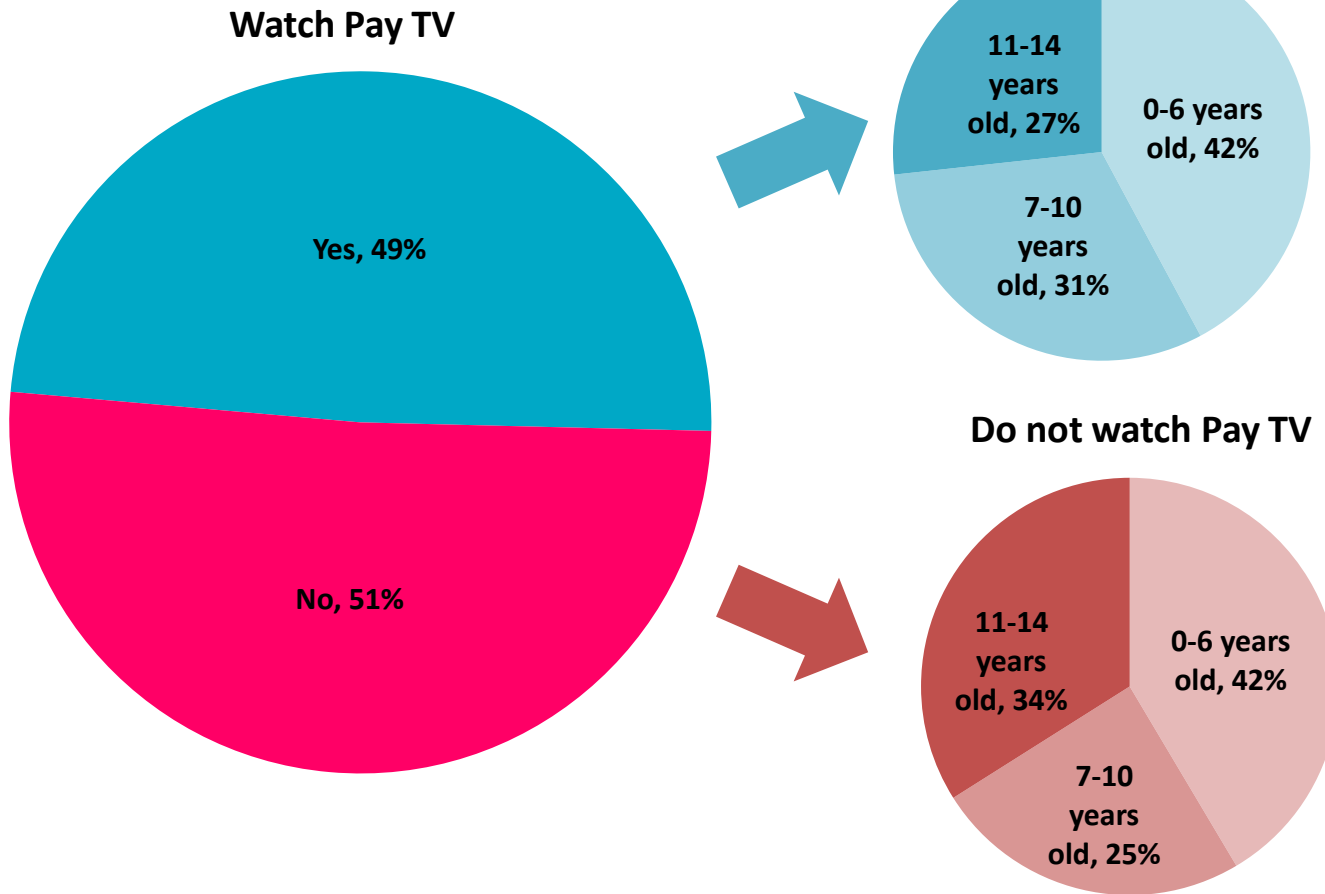
Reasons	Overall	0 - 6 years old	7 - 10 years old	11 - 14 years old
Newer shows, better programming on Pay TV	51%	51%	70%	34%
The shows not interesting, there are no celebrities I like etc.	22%	16%	15%	44%
Better programming on Internet	15%	12%	9%	27%
No suitable content	7%	5%	0%	0%
Not allowed to watch TV	5%	4%	9%	3%
There are too many repeats	4%	2%	0%	11%
Child does not understand	3%	2%	0%	0%
Programmes are old	2%	0%	4%	6%
I don't understand the language	2%	3%	0%	0%
No time to watch	2%	1%	2%	1%
Others, e.g. content not educational, no time to watch	1%	2%	0%	0%

Note: Respondents were children who did not watch MediaCorp channels on the television or the Internet.



3.3 Pay TV

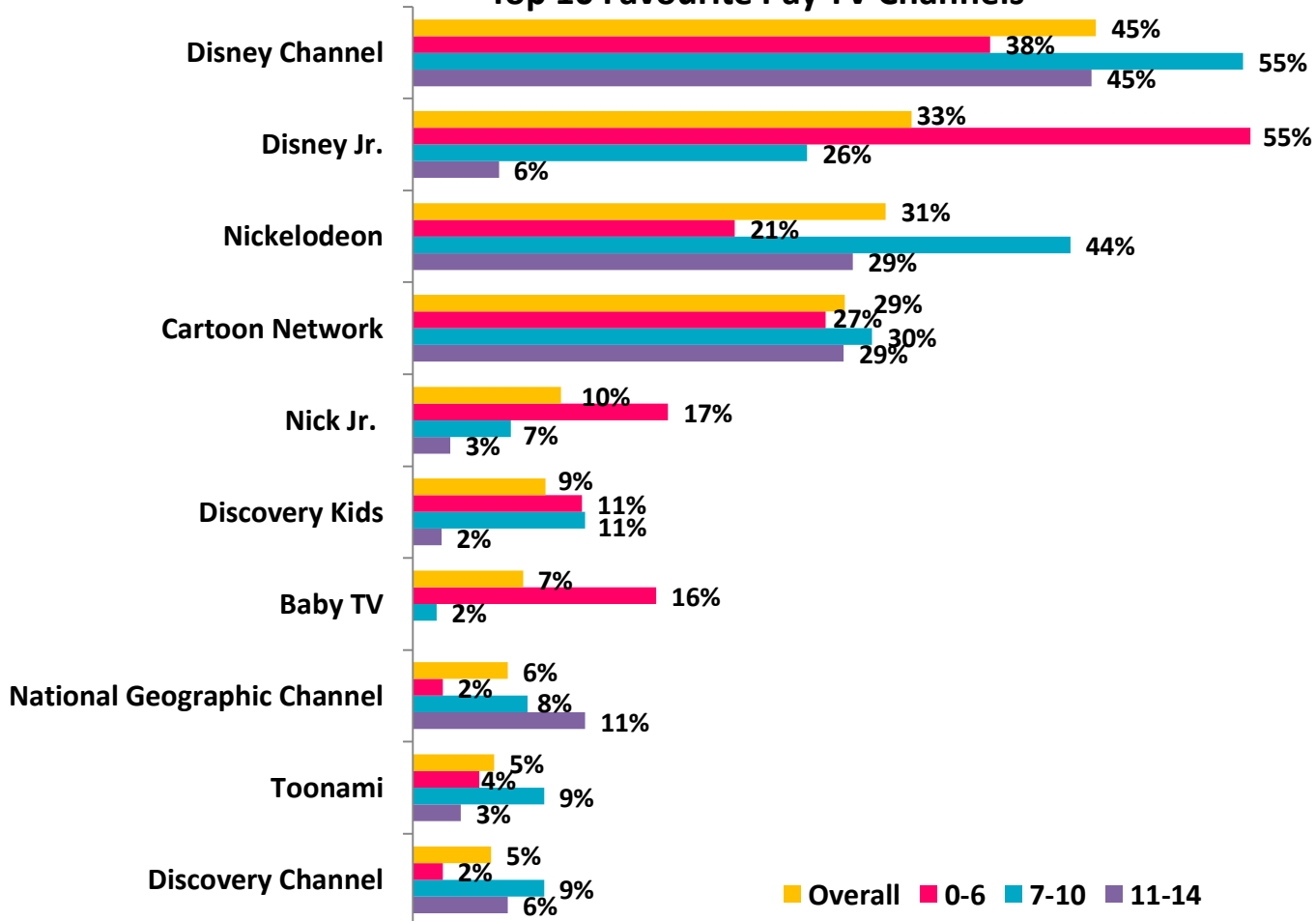
Slightly less than half of the respondents have watched Pay TV



3.3 Pay TV

Younger children's favourite channel was Disney Junior, while older children preferred Disney Channel

Top 10 Favourite Pay TV Channels



Note: Respondents were children who watched Pay TV channels on the television or the Internet.

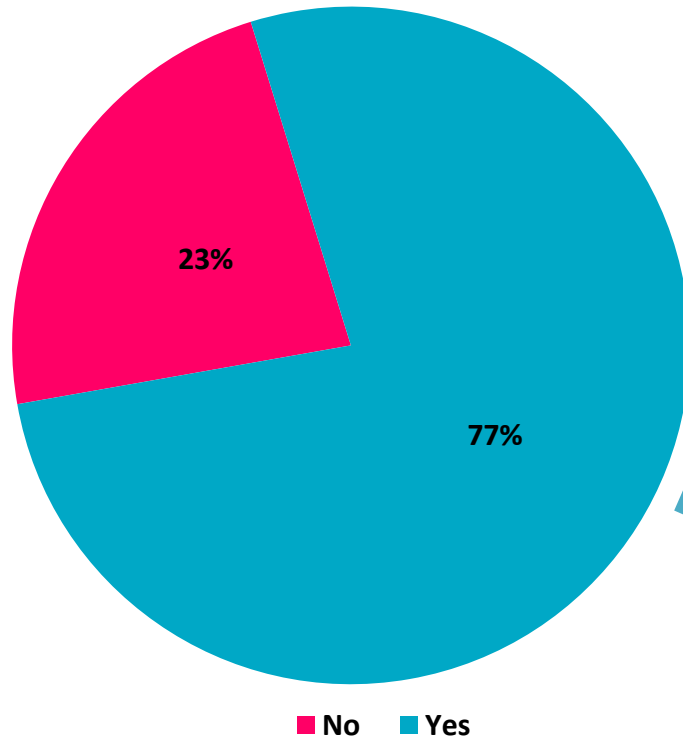


4. Online Usage and Habits

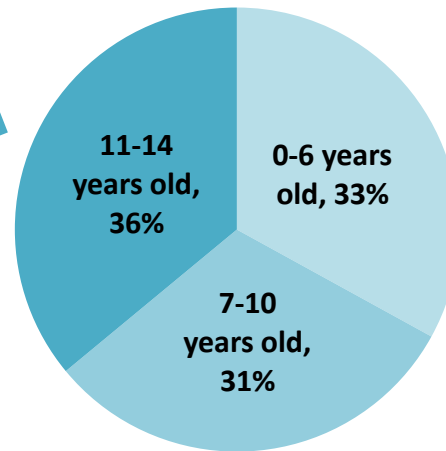
4. Online Usage and Habits

More than three quarters of respondents have gone online

Went online for media and non-media activities



Went online, broken down by age groups

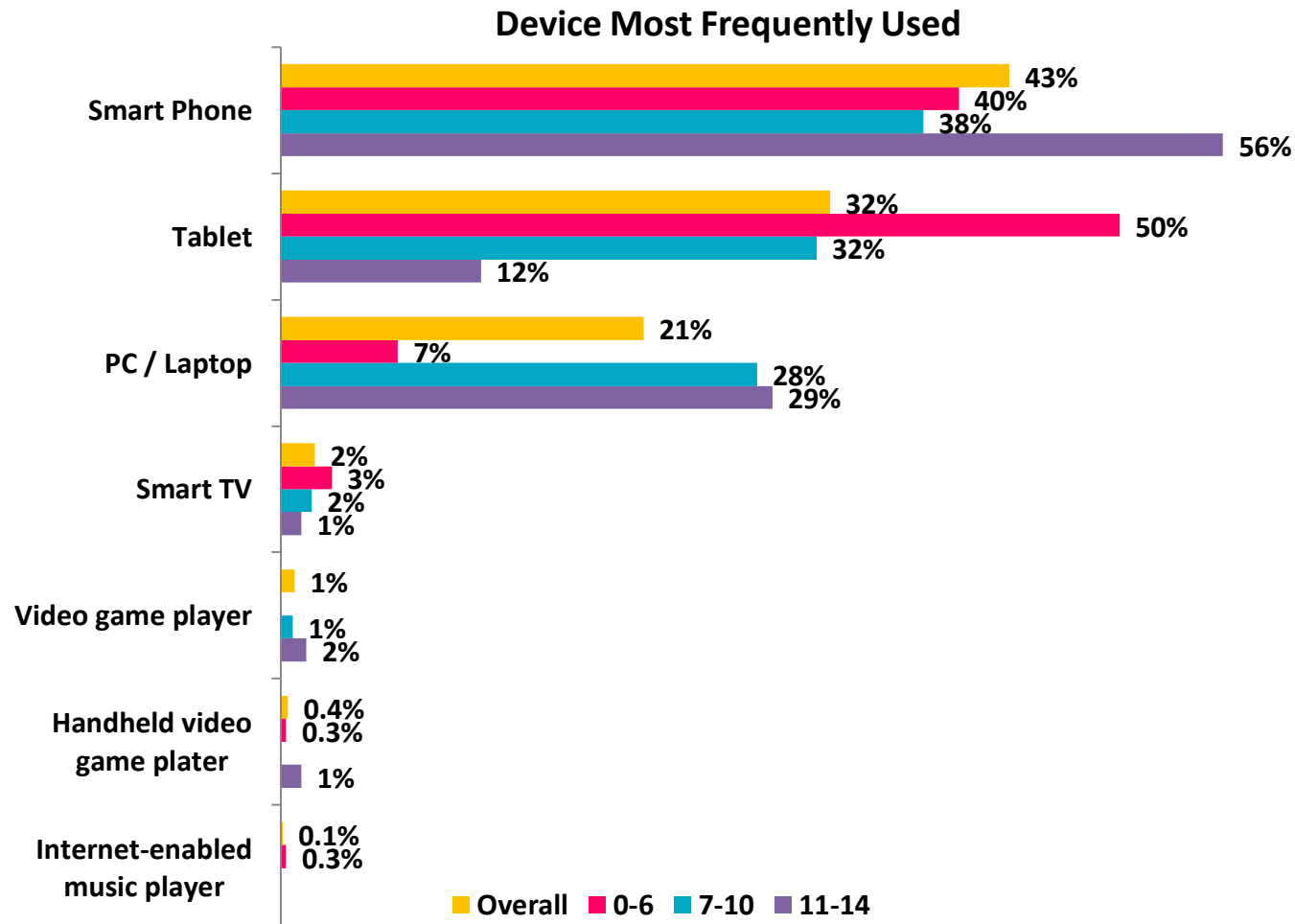


The proportion of children who have gone online were evenly split amongst the different age groups, suggesting that parents were exposing their children to the Internet at a young age.



4. Online Usage and Habits

The most frequently used device to go online is the smart phone, followed by tablet and PC / laptop



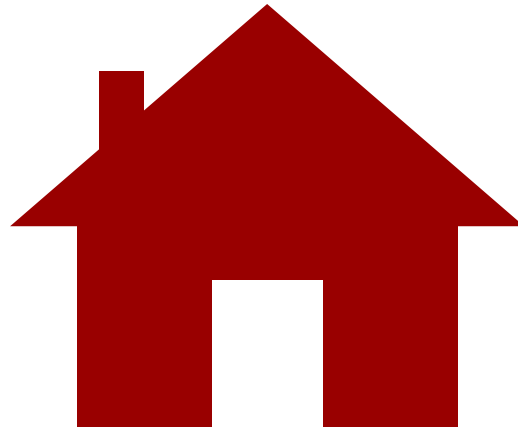
The tablet was the device most frequently used by children aged 0 to 6 to go online, while smart phones were most frequently used by older children.

Note: Respondents were children have used the respective devices to access the Internet.



4. Online Usage and Habits

The most common location to access the Internet was at home, via a smart phone



98% of children who have gone online, have accessed the Internet at home. Amongst these children,

- 41% used a smart phone
- 70% accessed the Internet at home at least 4 to 6 days weekly.



35% accessed the Internet on-the-go. Amongst these children,

- 78% used a smart phone
- 50% accessed the Internet on-the-go at least 4 to 6 days weekly
- 65% used a post-paid mobile network



30% accessed the Internet in school or a library. Amongst these children,

- 68% used a laptop or PC
- 25% accessed the Internet in school or the library at least 4 to 6 days weekly
- 80% used the school or library network

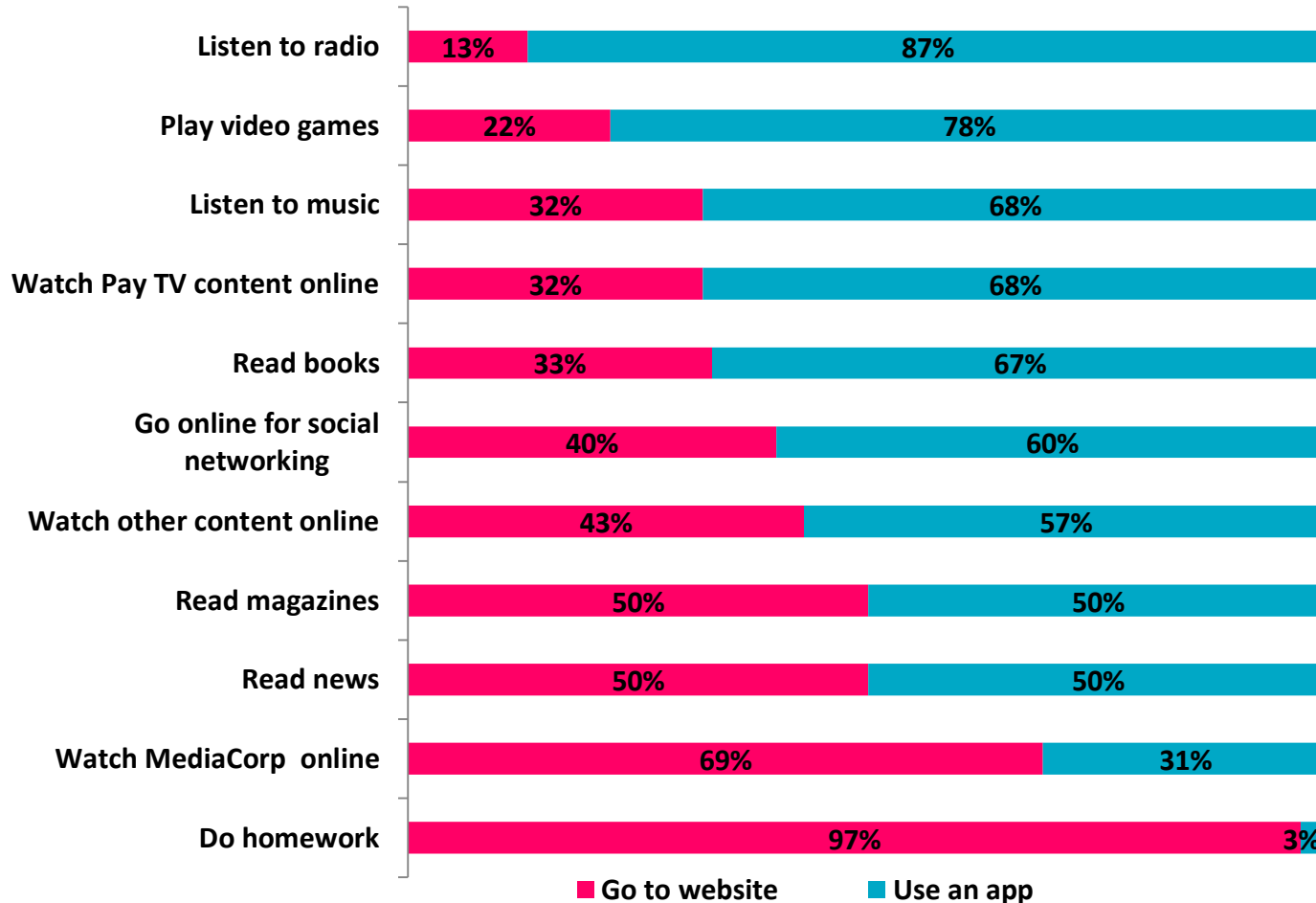
Note: Respondents were children who have accessed the Internet.



4. Online Usage and Habits

Accessing content via applications getting increasingly common

Methods to Access Online Content



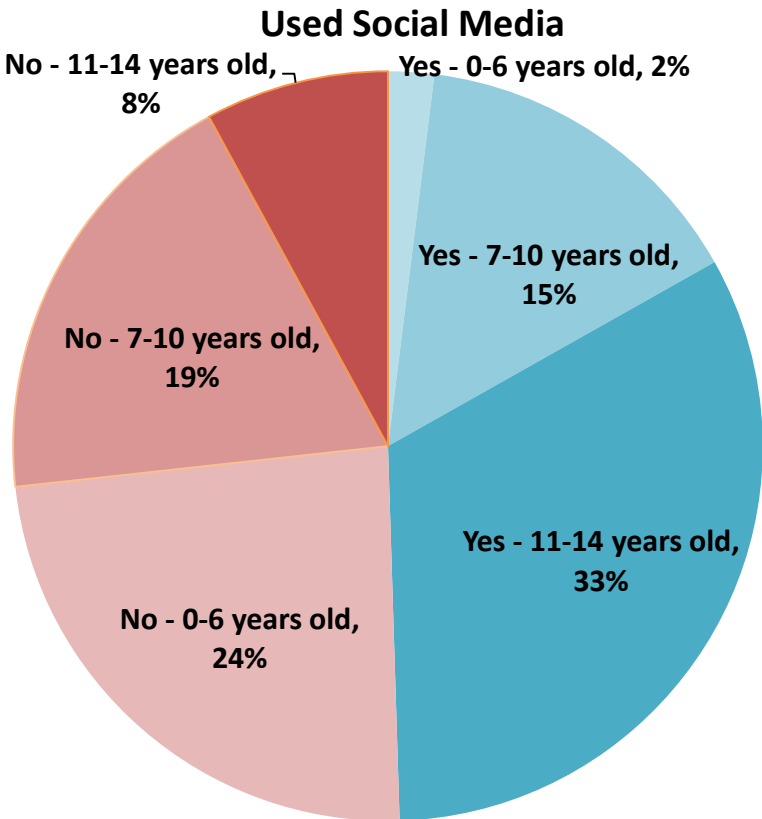
Note: Respondents were children who have accessed the Internet.



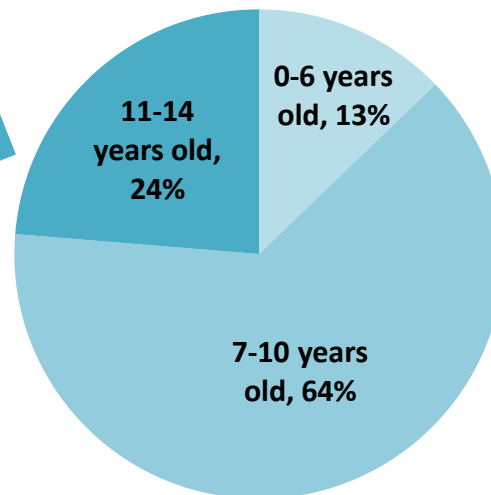
5. Social Media Usage and Habits

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Half of the children surveyed have used social media, with most aged between 11 and 14 years old



Age Started Social Media



Most children started using social media between ages 7 and 10 years old.

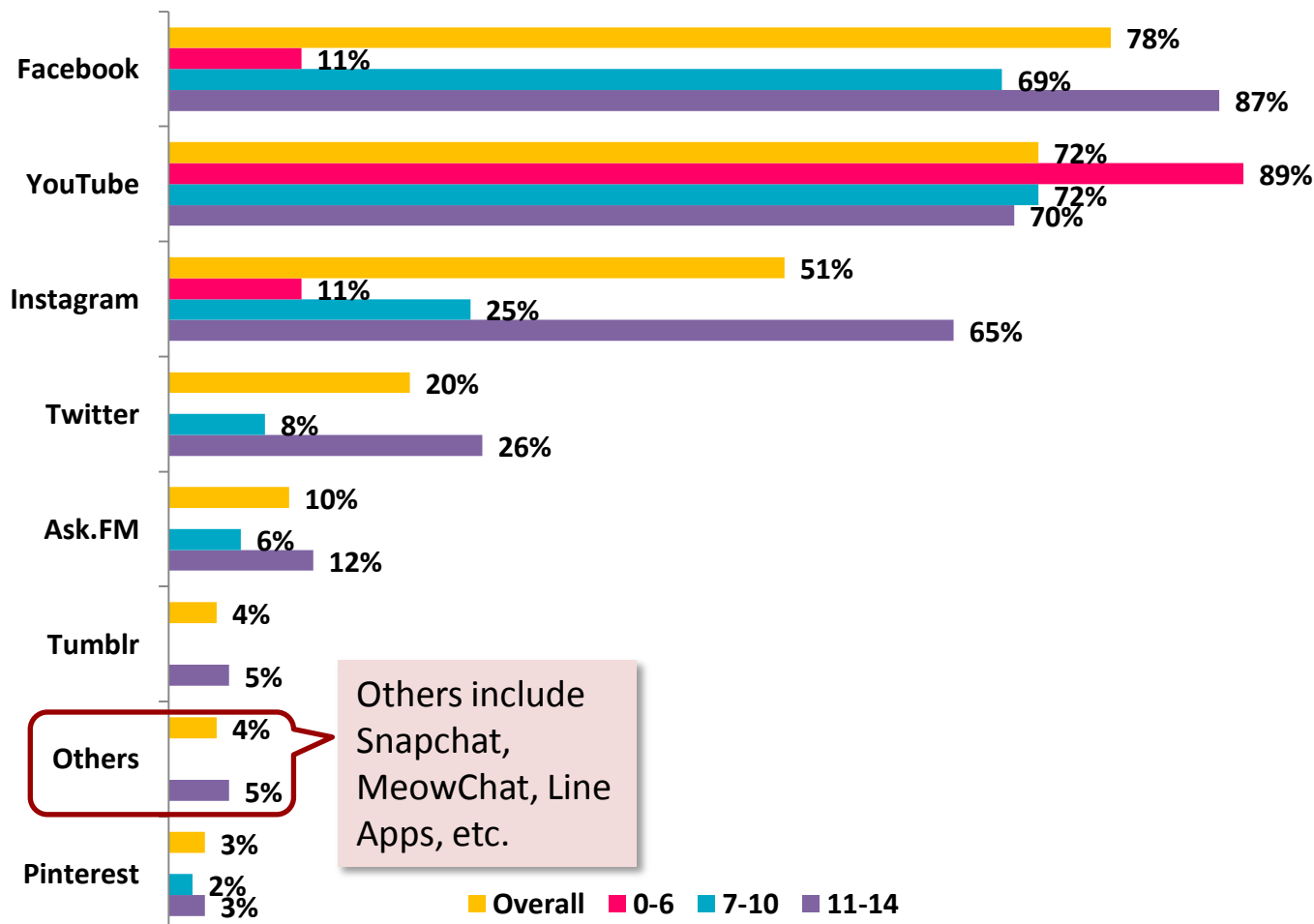
Note: Respondents were children who answered the survey.



5. Social Media Usage and Habits

Most respondents have used Facebook, YouTube and Instagram

Social Media Networks Used



Facebook was the most popular social network amongst the older children, while YouTube was the main social media network used by children aged 10 and below.

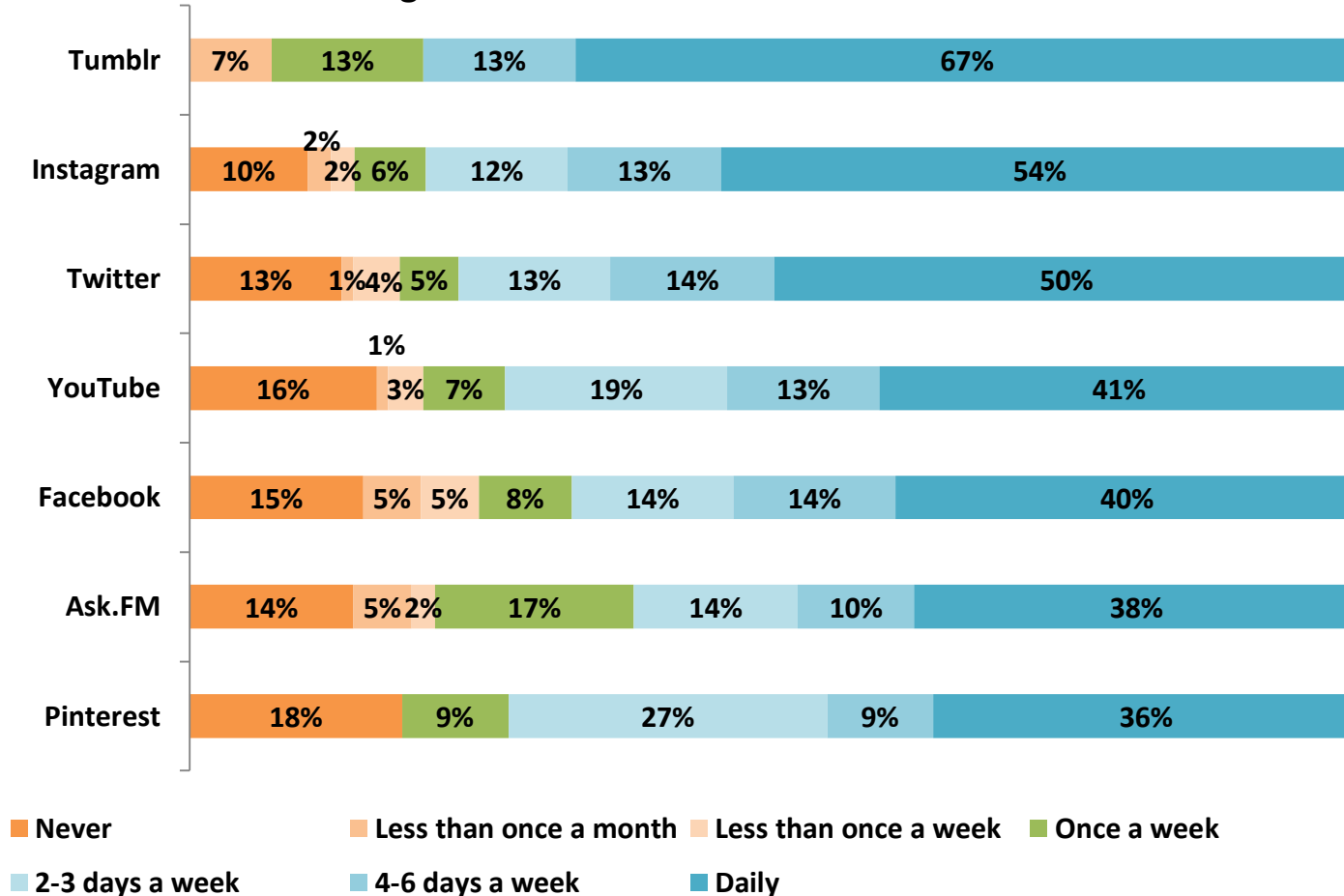
Note: Respondents were children who have used social media.



5. Social Media Usage and Habits

More than half the children accessed social media weekly via mobile devices



Using Mobile Devices to Access Social Media



Note: Respondents were children who have used social media.



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