

MDA Zero-to-Fourteen Consumer Experience Study 2015

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1. Executive Summary

Executive Summary

Media Consumption Habits

- Children spent the most time watching Mediacorp on TV, at 0.9 hours daily, and it was the top activity amongst older children (7 to 14 years). However, younger children (0 to 6 years) spent the most time watching Pay TV and other content.
- Amongst Mediacorp channels, Okto was the most watched channel by children aged 10 and below, while Channel 8 remained the most watched channel by older children (aged 11 to 14).

Internet Take-Up

- Almost 8 in 10 children (79.8%) have used the Internet in 2015. On average, children started using the Internet at 6.1 years old.
- The smartphone and tablet remained the top two devices most often used to access the Internet in 2015 at 86.1% and 78.3% respectively, while handheld video game players took third place with a score of 74.5%.

Social Media Usage

- 65.0% of children have used social media, an increase from 2014's 49.8%.
- YouTube was both the most used (91.4%) and favourite (79.1%) social media network amongst children.

2. Research Objectives and Methodology

Research Objectives and Methodology

The **Zero-to-Fourteen Consumer Experience Study (CS)** was conceptualised as a complementary study to the Media Consumer Experience Study (MCES), aimed at understanding children's media consumption habits and preferences. The CS was conducted for the second time in 2015, and aims to:

- Analyse children's traditional and online media consumption behaviour and habits; and
- Provide insights into children's Internet usage patterns, including the use of social media in terms of websites and devices.

The CS was conducted by Degree Census Consultancy Pte Ltd. A representative sample of 1,200 Singapore Citizens and Permanent Residents aged 0 to 14 years was surveyed, with the parents of those aged 0 to 6 years old answering on their behalf. Face-to-face Interviews were conducted from November to December 2015 and lasted about 30 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.

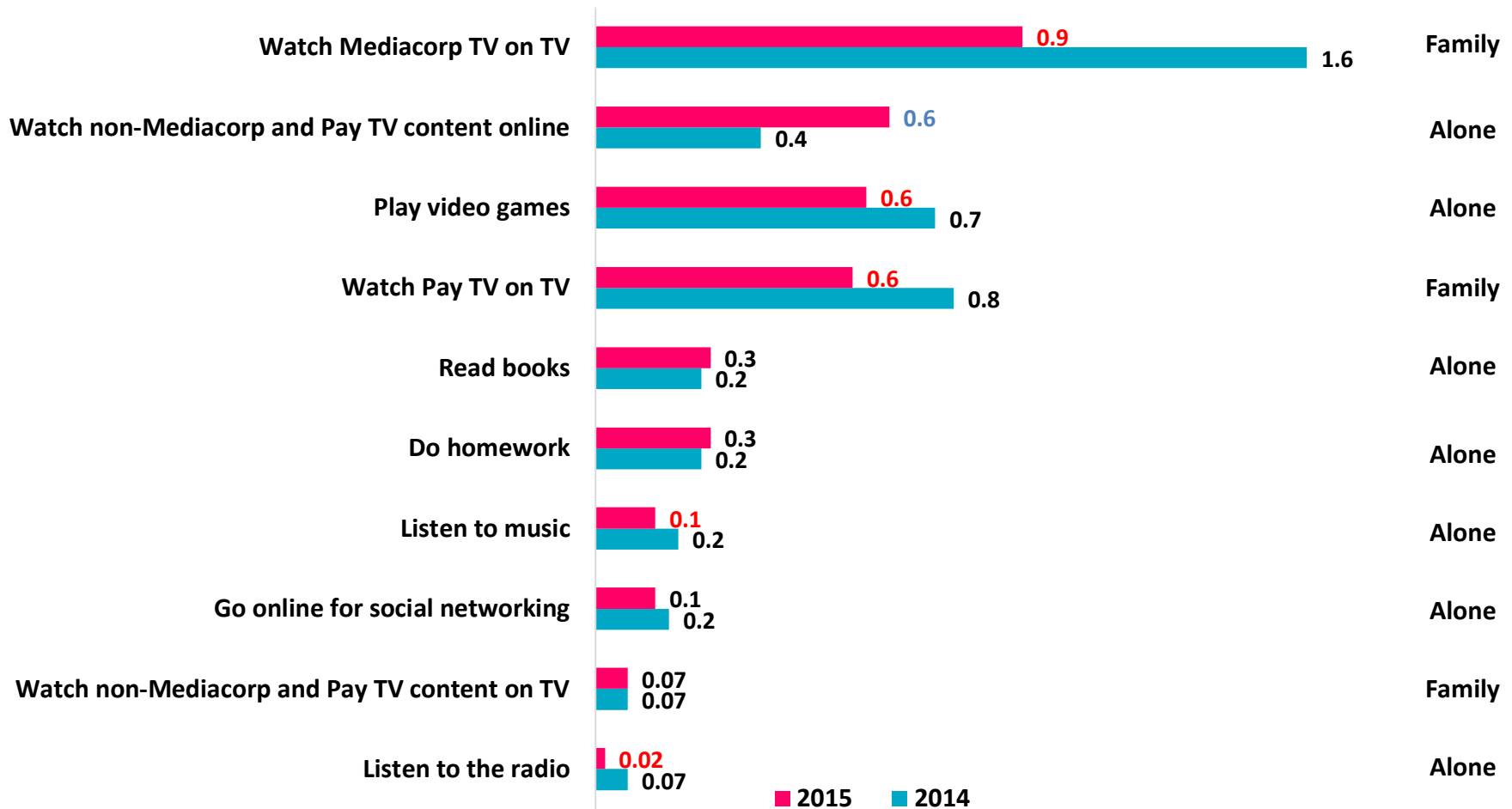
3. Media Consumption Habits

Children spent the most time watching Mediacorp programmes on television

- Despite a drop from last year, watching Mediacorp programmes on Free-to-Air TV remained the media activity children spent the most time on, at 0.9 hours daily.

Chart 1: Daily Time Spent on Media Activities (hours) – overall

Accompanied by:



While top activities were similar, younger children watched more Pay TV than Mediacorp content

Chart 2: Daily Time Spent on Media Activities (hours) – 0-6 years

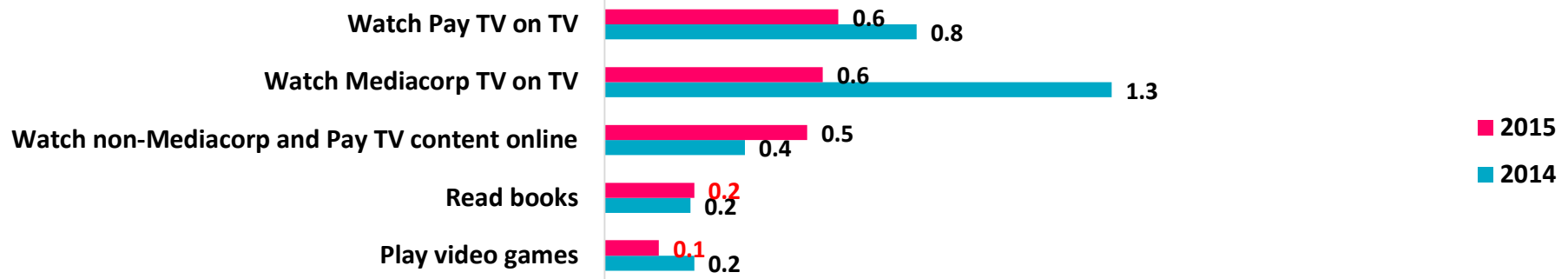


Chart 3: Daily Time Spent on Media Activities (hours) – 7-10 years

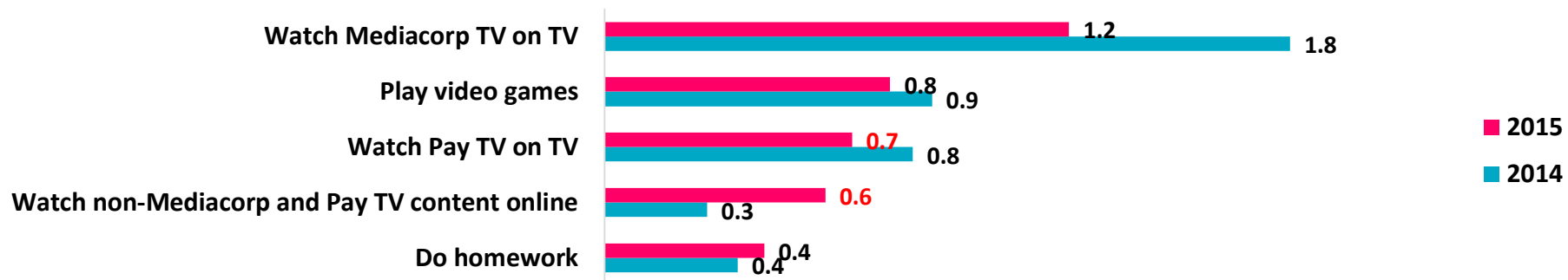
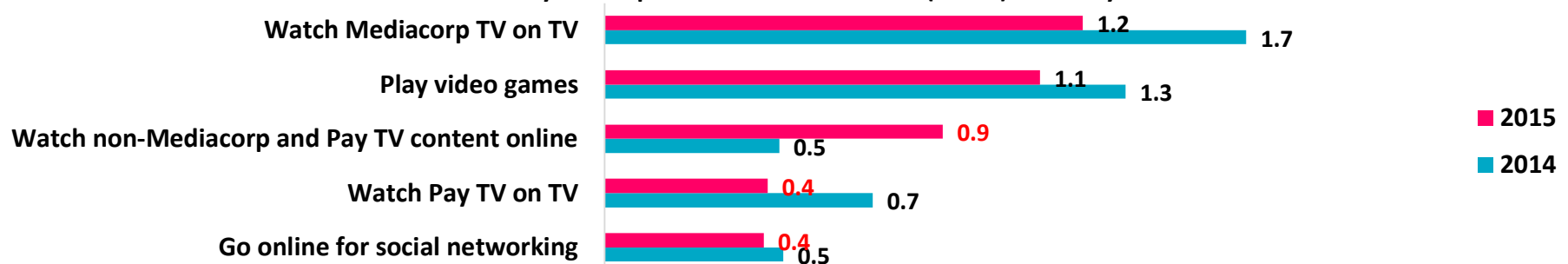


Chart 4: Daily Time Spent on Media Activities (hours) – 11-14 years



More than half of children surveyed watched Mediacorp's TV programmes

- Amongst children who have never watched Mediacorp TV, 6 in 10 (62.4%) were aged 0 to 6 years.

Chart 5: Children who watched Mediacorp TV (%)

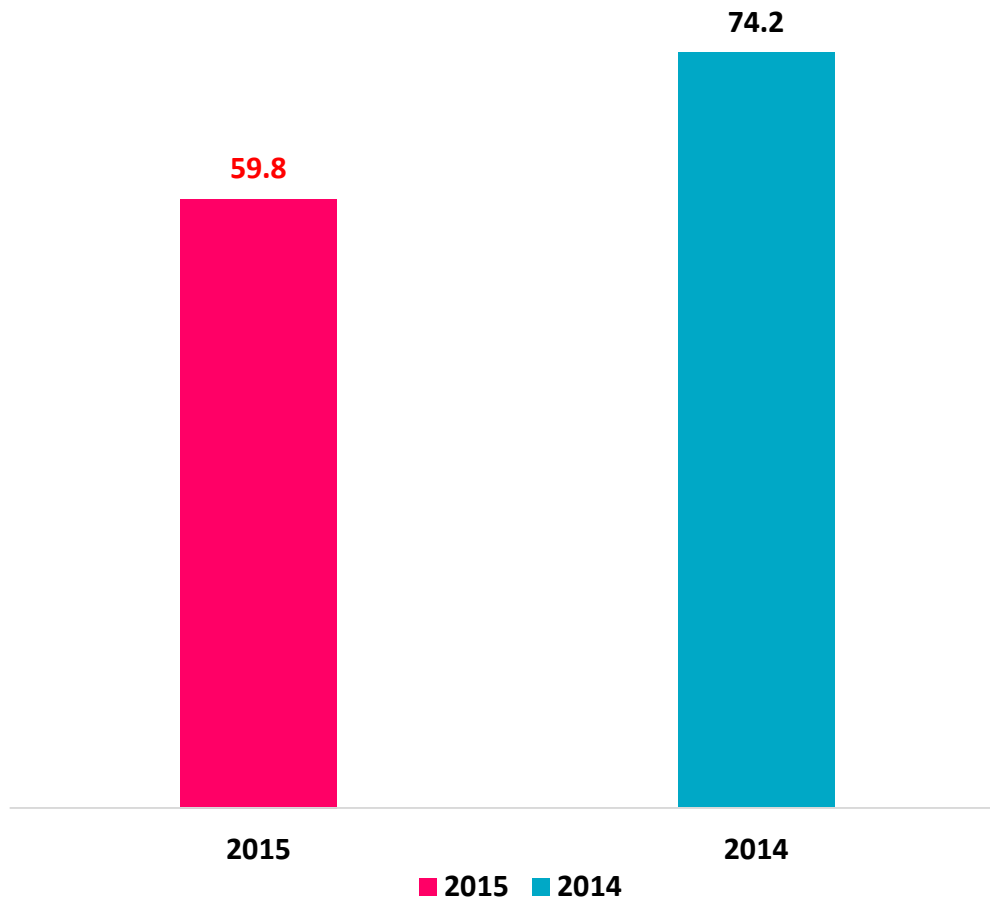


Chart 6: Watched Mediacorp TV – age breakdown (%)

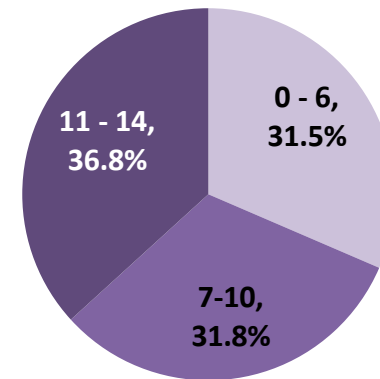
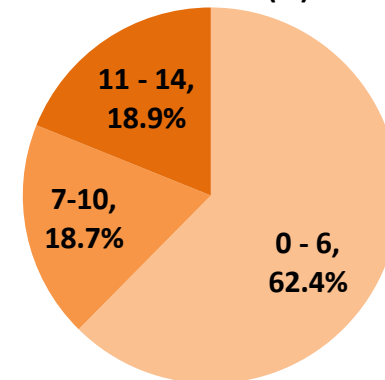


Chart 7: Did not watch Mediacorp TV – age breakdown (%)



Okto remained the channel most children have watched

- While most channels saw a drop in viewers, Channel U and Channel NewsAsia's viewership remained consistent.

Chart 8: Ever watched Mediacorp channels (%)

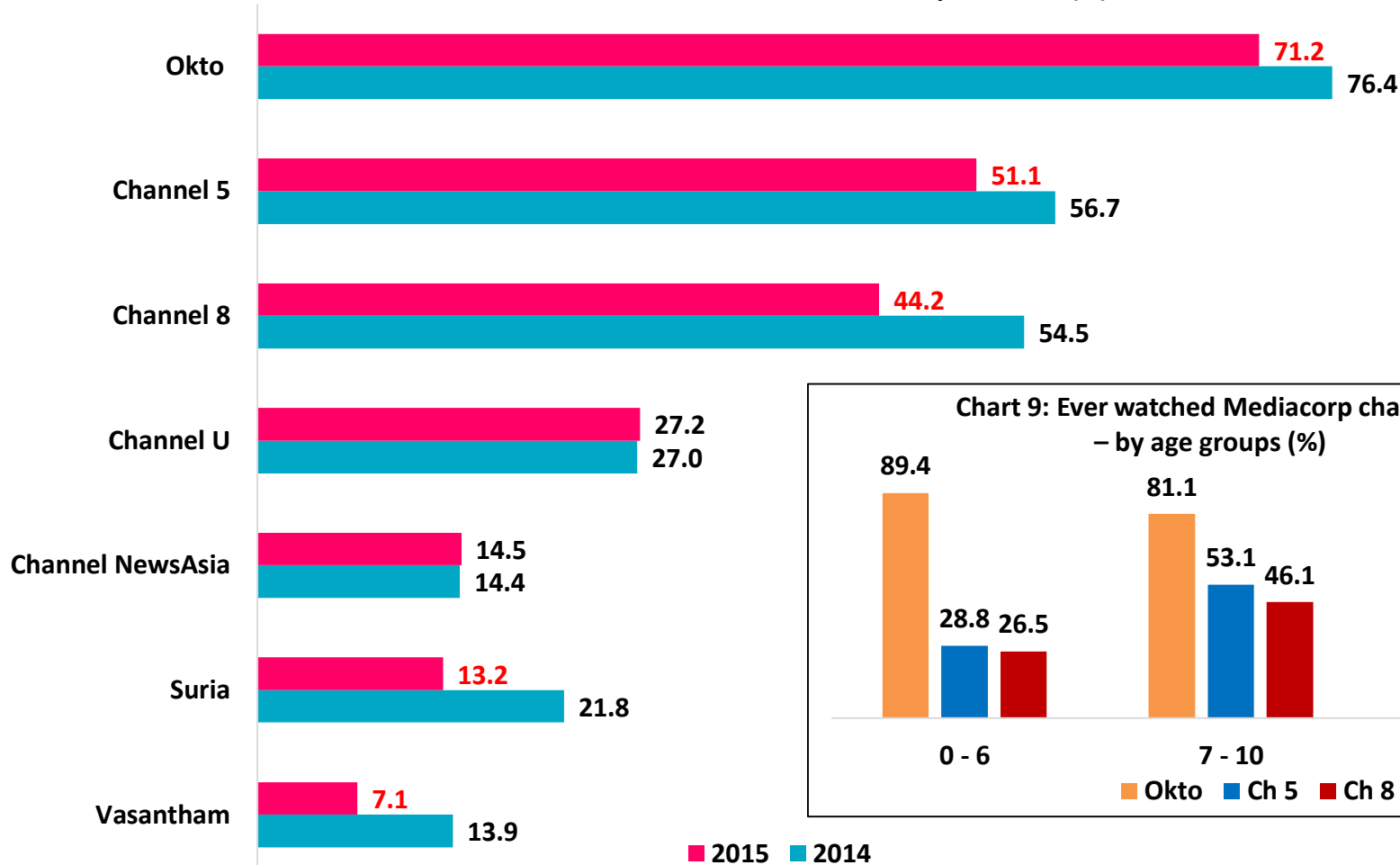
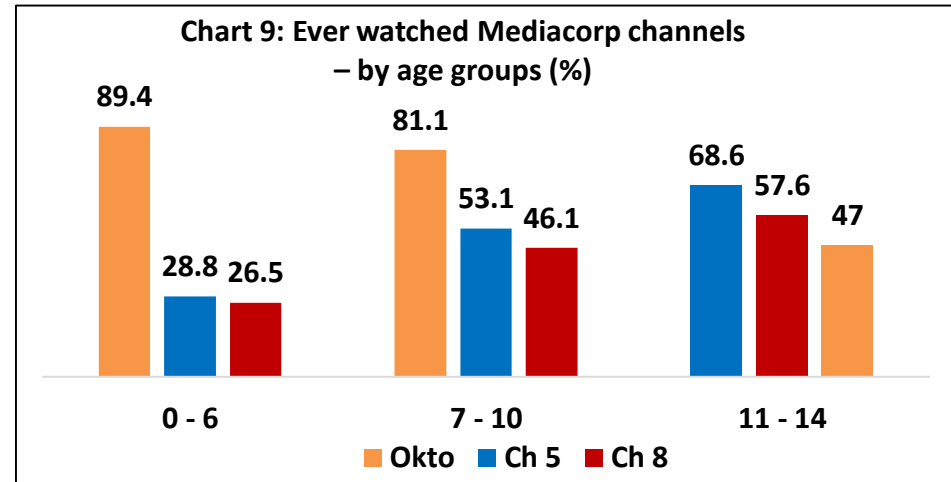


Chart 9: Ever watched Mediacorp channels – by age groups (%)



Okto was also the most frequently watched channel by children

- When looking at the different age groups, it can be observed that children's channel preferences also became more diverse as they grew older.

Chart 10: Most often watched Mediacorp channel (%)

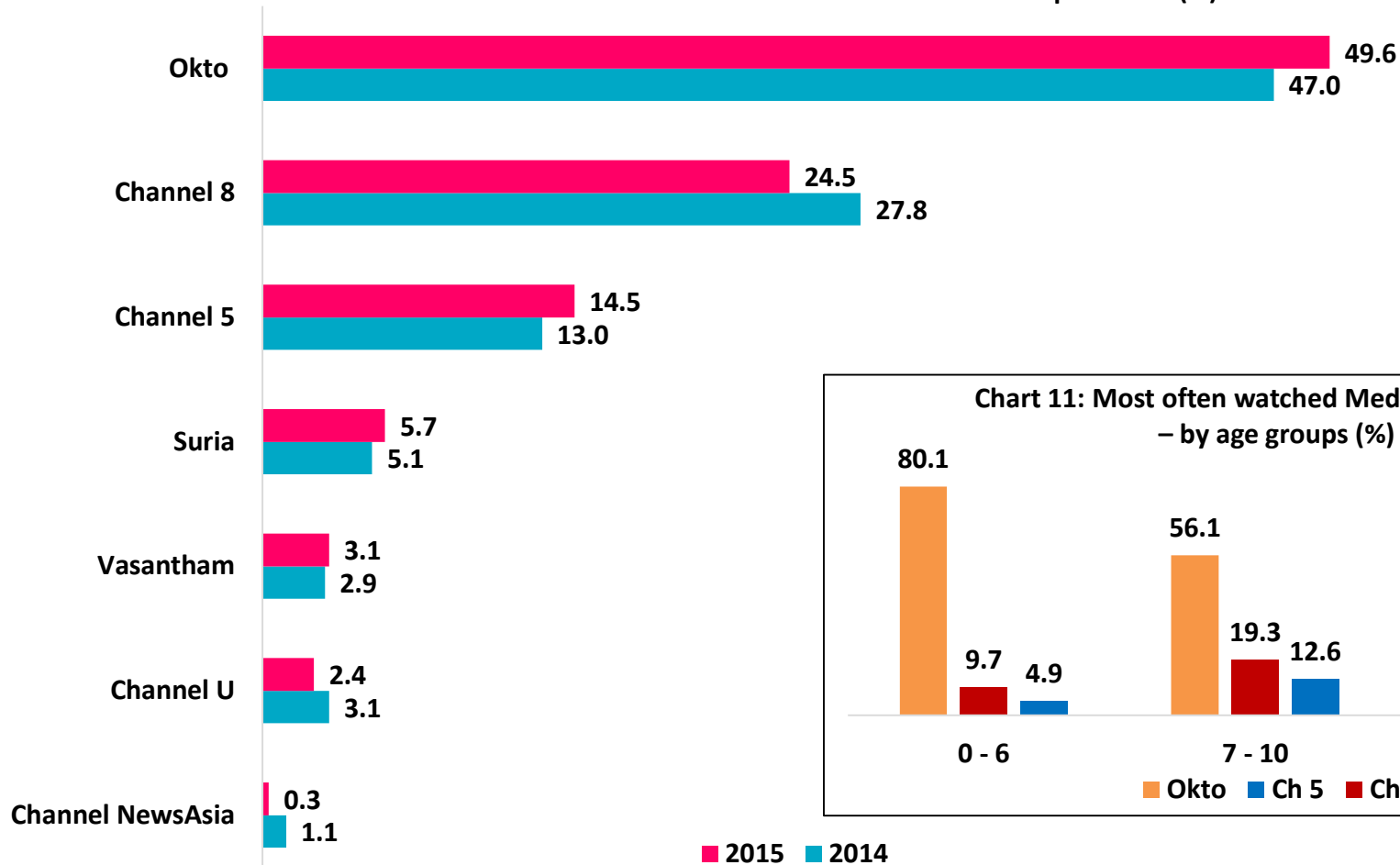
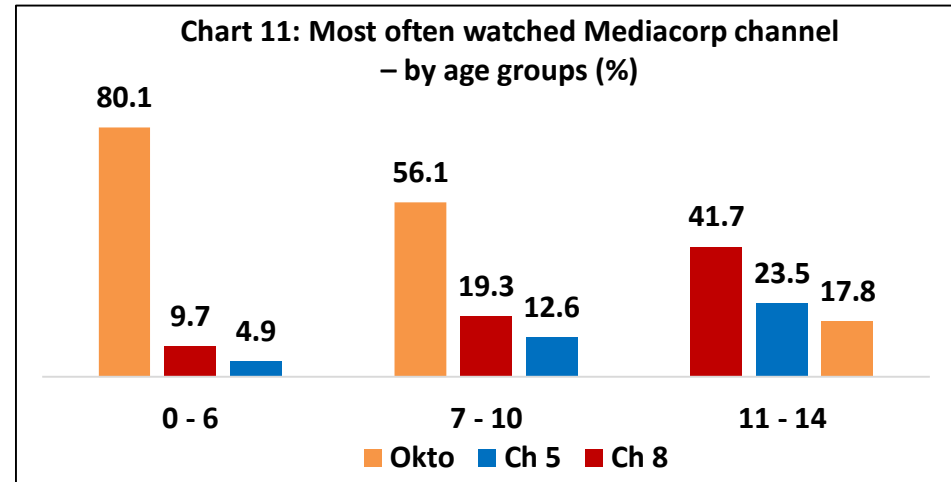


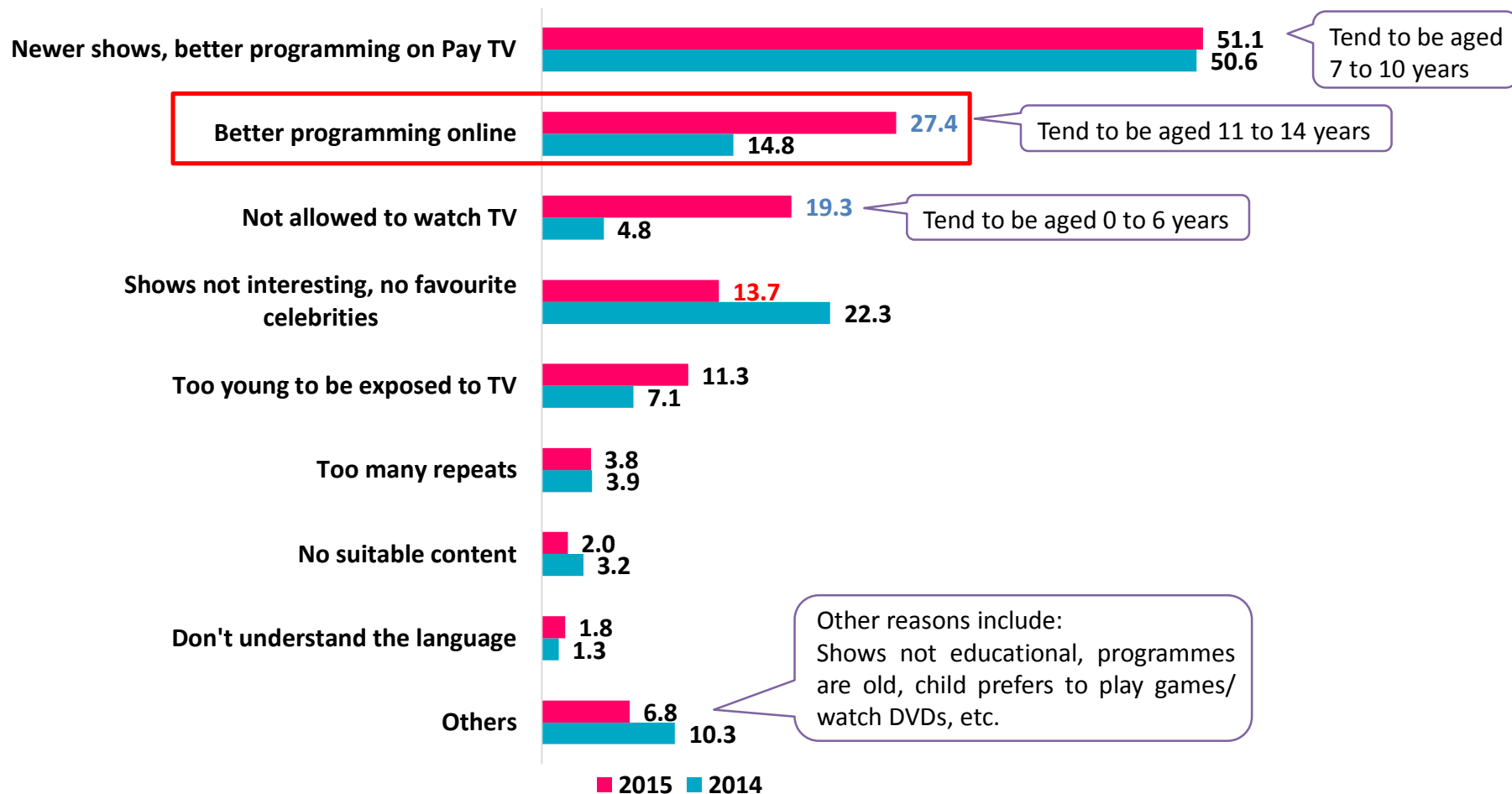
Chart 11: Most often watched Mediacorp channel – by age groups (%)



Better content on other platforms the main reason for not watching Free-to-Air TV

- In particular, there was an increase in children who chose not to watch Mediacorp TV due to better content online.

Chart 12: Reasons for seldom/ not watching Mediacorp TV



Less than 4 in 10 children watched Pay TV in 2015, a drop compared to 2014

- When it came to the individual channels, the Disney Channel, Disney Junior and Nickelodeon remained the top 3 channels.

Chart 13: Children who watched Pay TV (%)

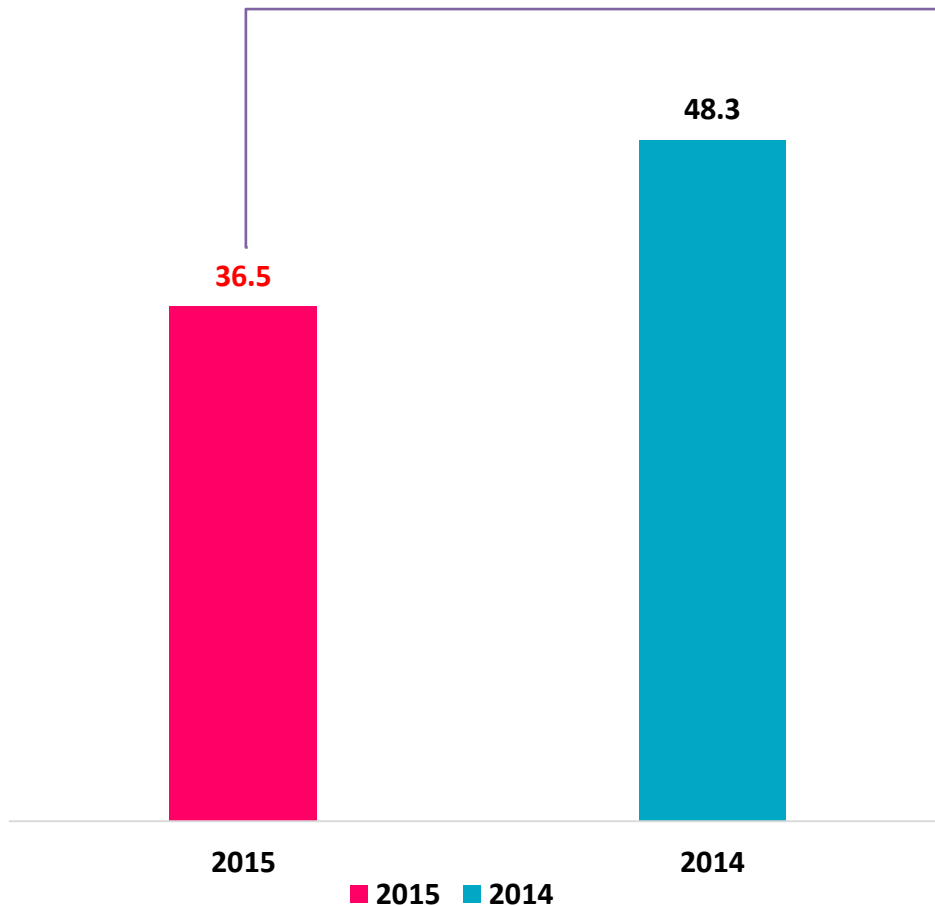


Table 1: Top Pay TV channels

Rank	Channel	%
1	Disney Channel	47.3%
2	Disney Junior	46.8%
3	Nickelodeon	44.7%
4	Cartoon Network	28.8%
5	Nick Jr.	18.0%
6	National Geographic Channel	10.3%
7	Discovery Kids	9.4%
8	Baby TV	7.5%
9	National Geographic Wild	5.5%
10	Toonami	5.3%

Amongst children who multitask, traditional and digital media were used in tandem

- The top paired media activities was watching the TV and using mobile devices at the same time, with nearly 8 in 10 children doing so.

Chart 14: Used multiple devices at the same time (%)

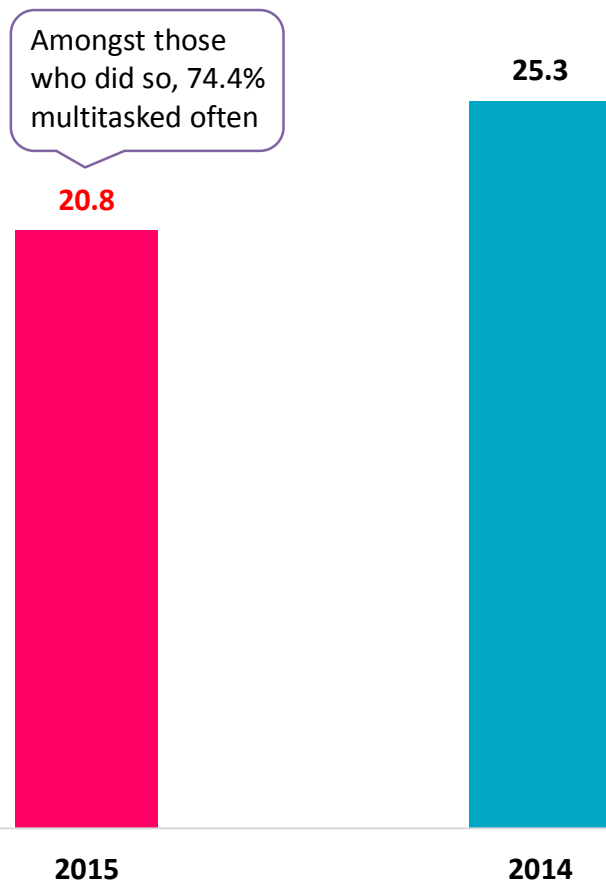


Chart 15: Children who multitask – age breakdown

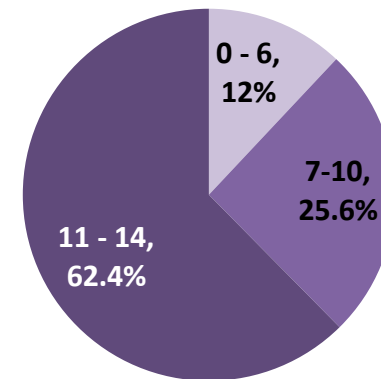


Table 2: Top paired multitasking activities

Paired Activities	%
Watch TV and use mobile devices	77.6
Use laptop/ PC and use mobile devices	26.0
Use mobile devices and listen to music/ radio	22.8
Watch TV and use laptop/ PC	14.4
Use mobile devices and read newspaper/ magazines	12.4

4. Online Usage and Habits

More children have gone online, and at a young age

- On average, around 8 in 10 children (79.8%) have used the Internet.
- Children started accessing the Internet at 6.1 years old, and generally go online 4 to 6 days a week.

Chart 16: Children who used the Internet (%)

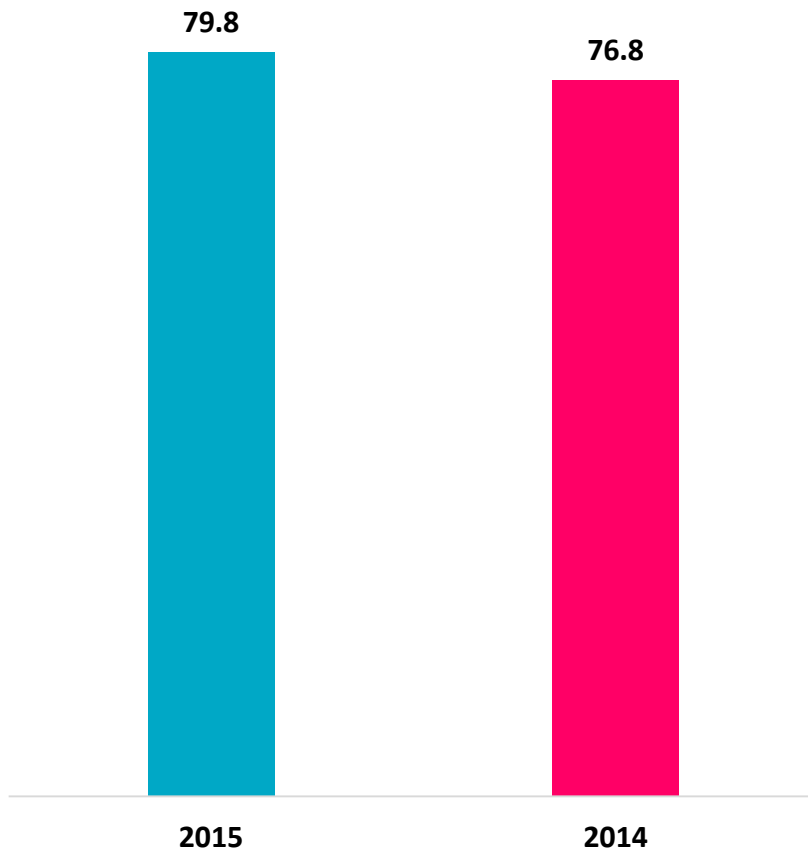


Chart 17: Starting age of children using the Internet

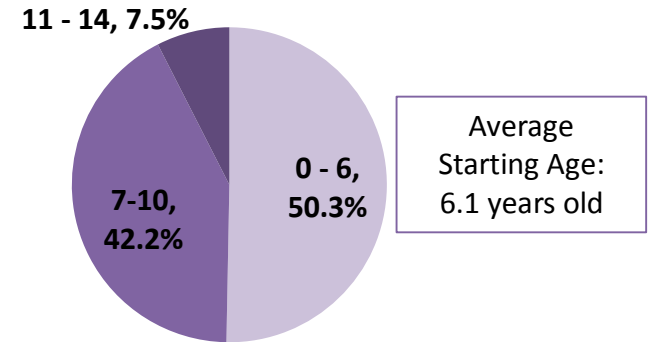
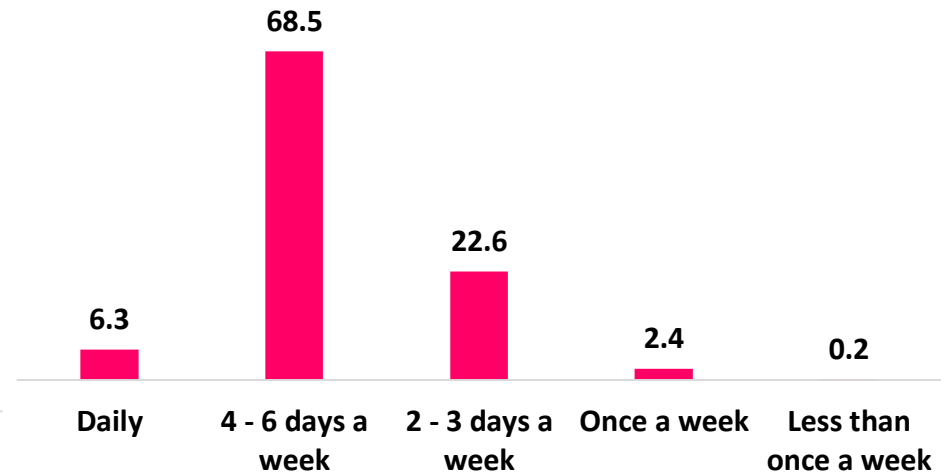


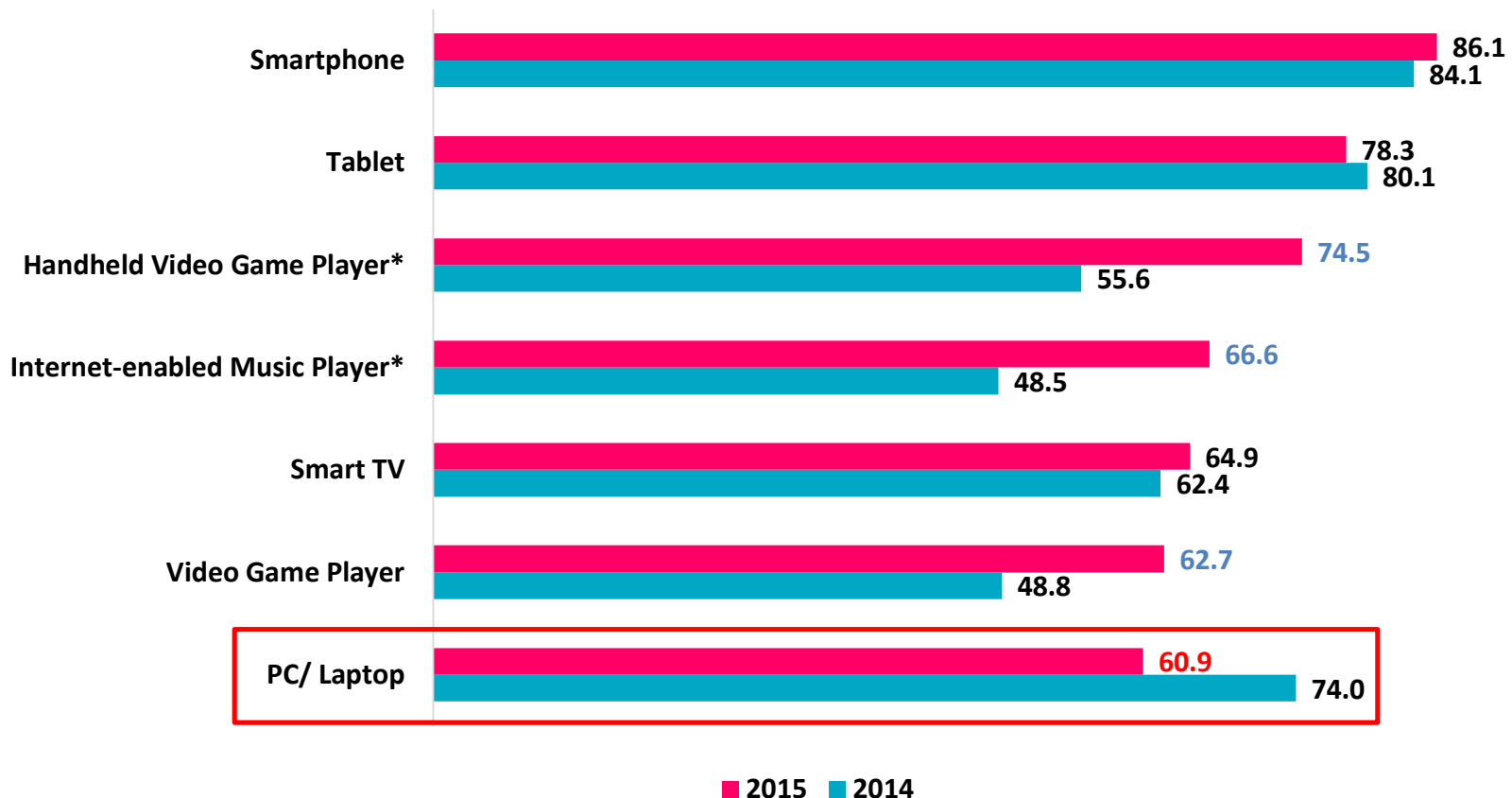
Chart 18: Frequency of using the Internet (%)



Children's device of choice for going online: Smartphone

- While the smartphone and tablet remained the most often used devices, usage of the PC/ laptop dropped from third to last.

Chart 19: Devices normally used to access the Internet (%)



Amongst children who have gone online, almost all have accessed the Internet at home

- Majority accessed the Internet at home at least 4 to 6 days a week, through their smartphones.

99.6% of children used the Internet at home in 2015, up from 97.5% in 2014

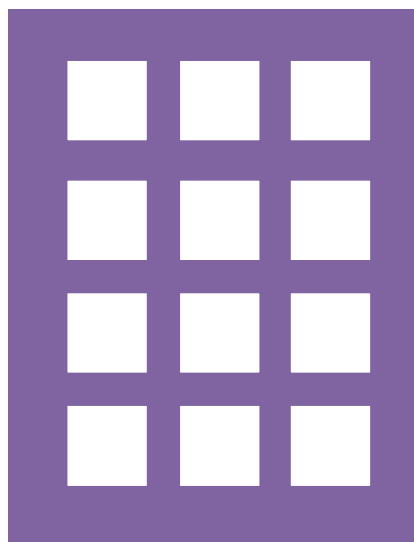


Chart 20: Frequency of accessing the Internet (%)

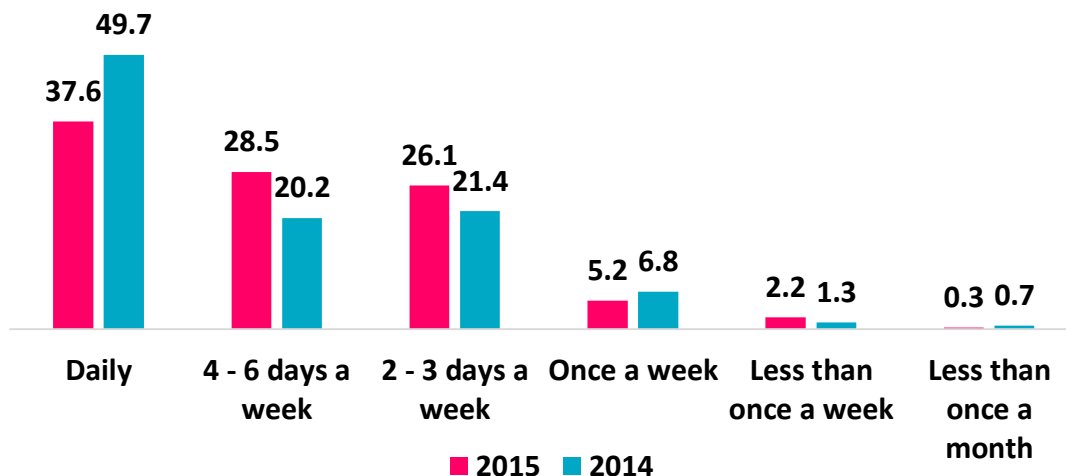
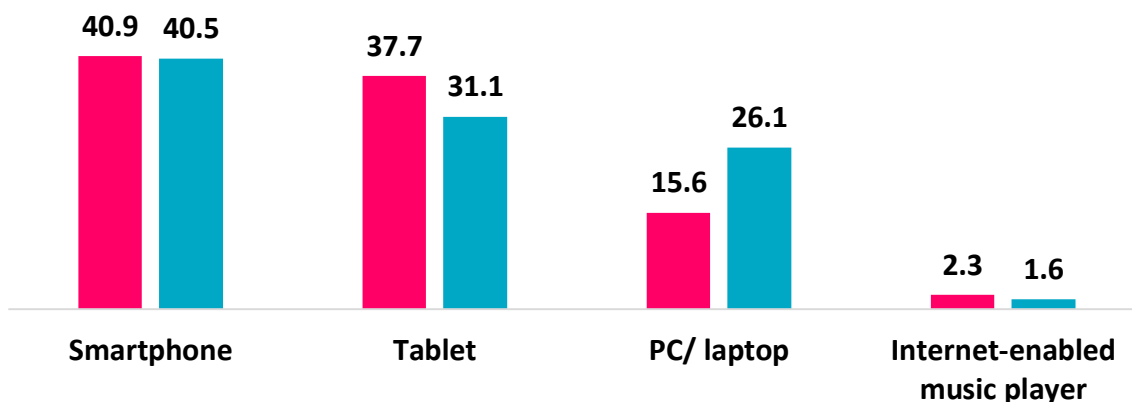


Chart 21: Device mostly used to access the Internet (%)



Less than a third have gone online in school or at a library

- Amongst these children, more than half had gone online at least weekly, with most using their PC or laptops.

30.4% of children used the Internet in school or a library in 2015, the same as 2014



Chart 22: Frequency of accessing the Internet (%)

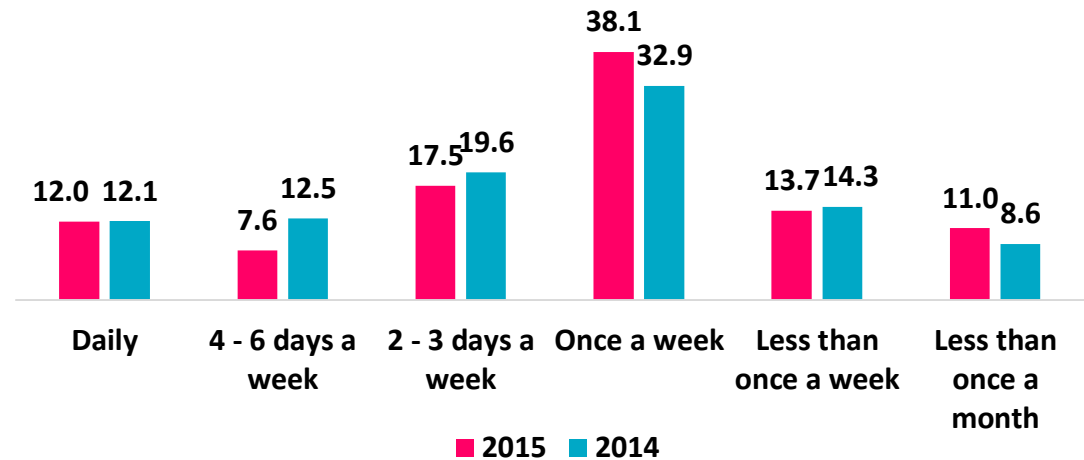
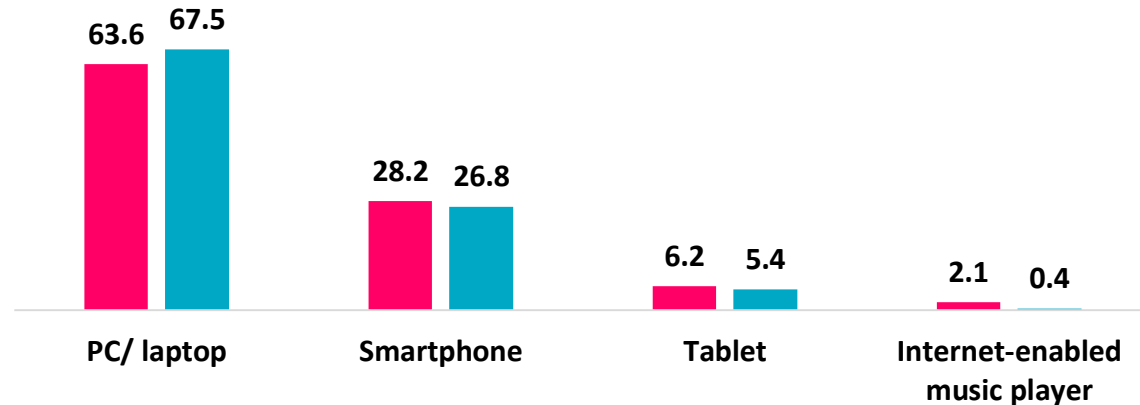


Chart 23: Device mostly used to access the Internet (%)



Nearly a third of children have used the Internet on-the-go

- More than half went online while travelling at least two times a week, with nearly all using smartphones.

32.6% of children used the Internet on-the-go in 2015, a slight drop from 2014's 35.4%

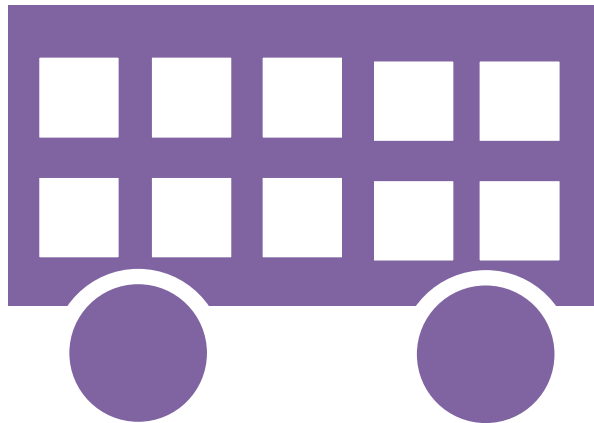


Chart 24: Frequency of accessing the Internet (%)

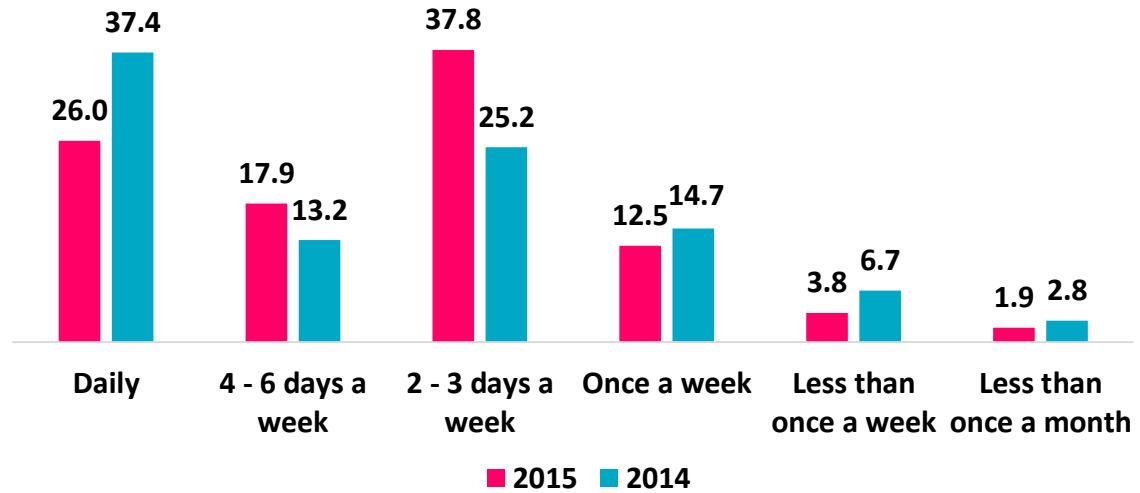
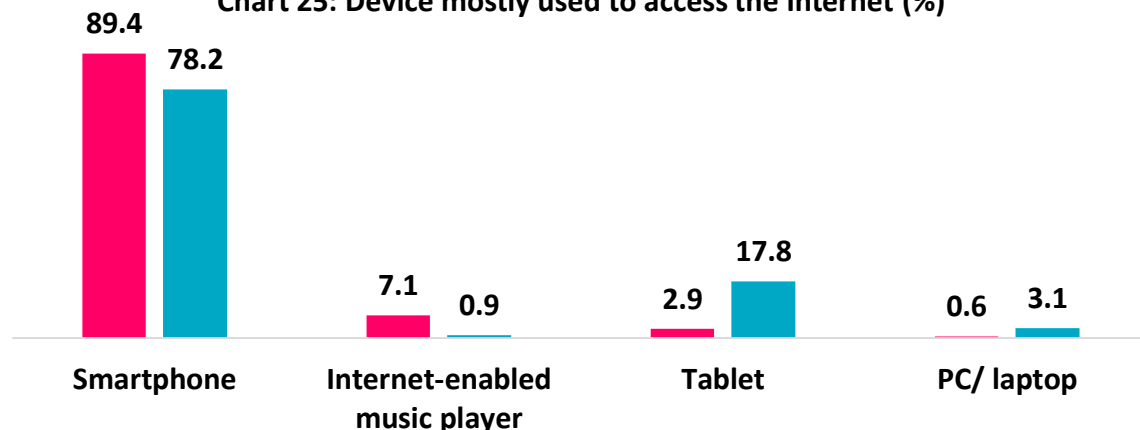
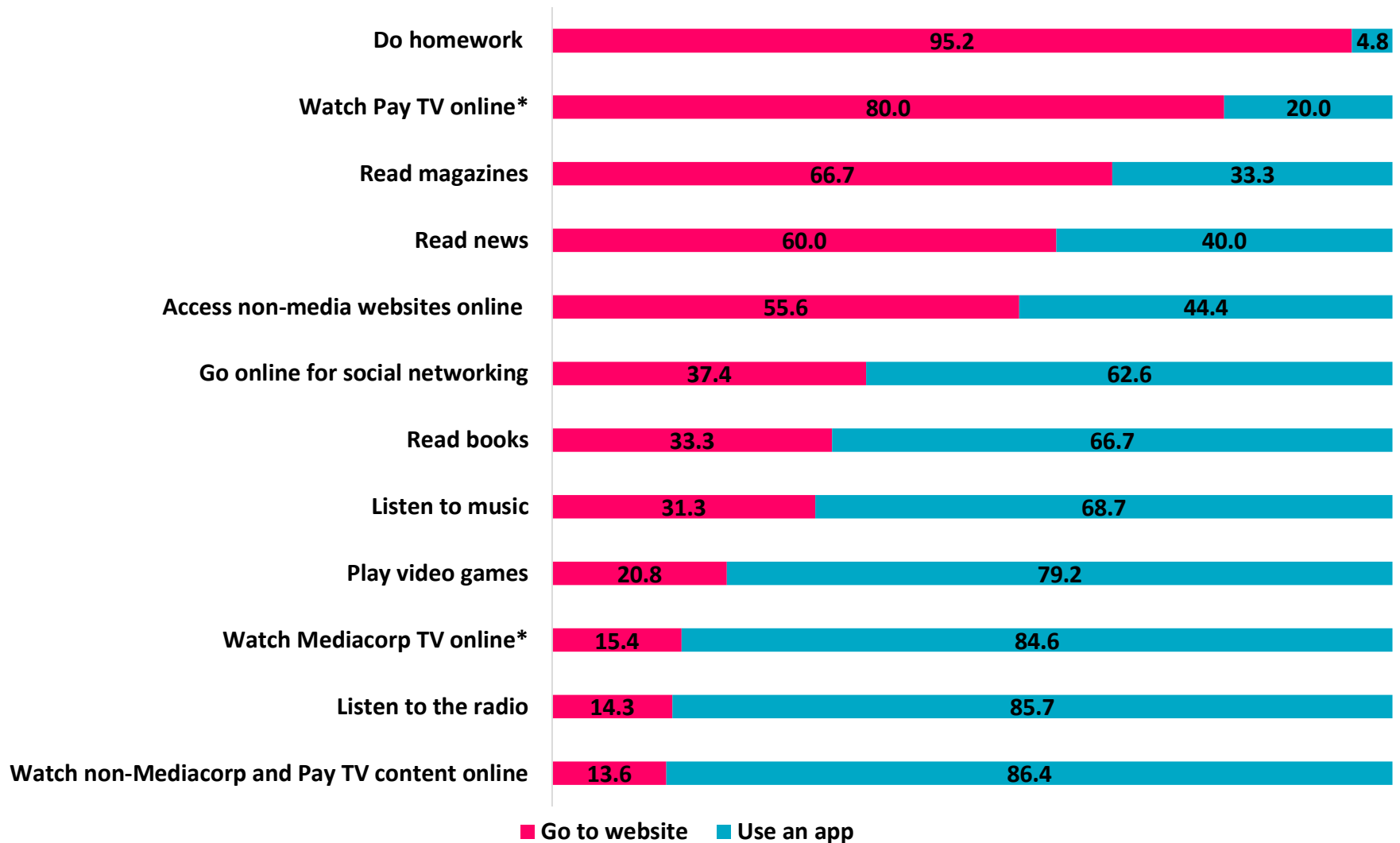


Chart 25: Device mostly used to access the Internet (%)



While websites were used to read content, video consumption took place mostly via apps

Chart 26: Methods mostly used to access online content (%)



5. Social Media Usage and Habits

More children used social media in 2015

- Similar to 2014, most children started using social media between 7 to 10 years old, with the average starting age being 8.6 years old.

Chart 27: Children who have used social media (%)

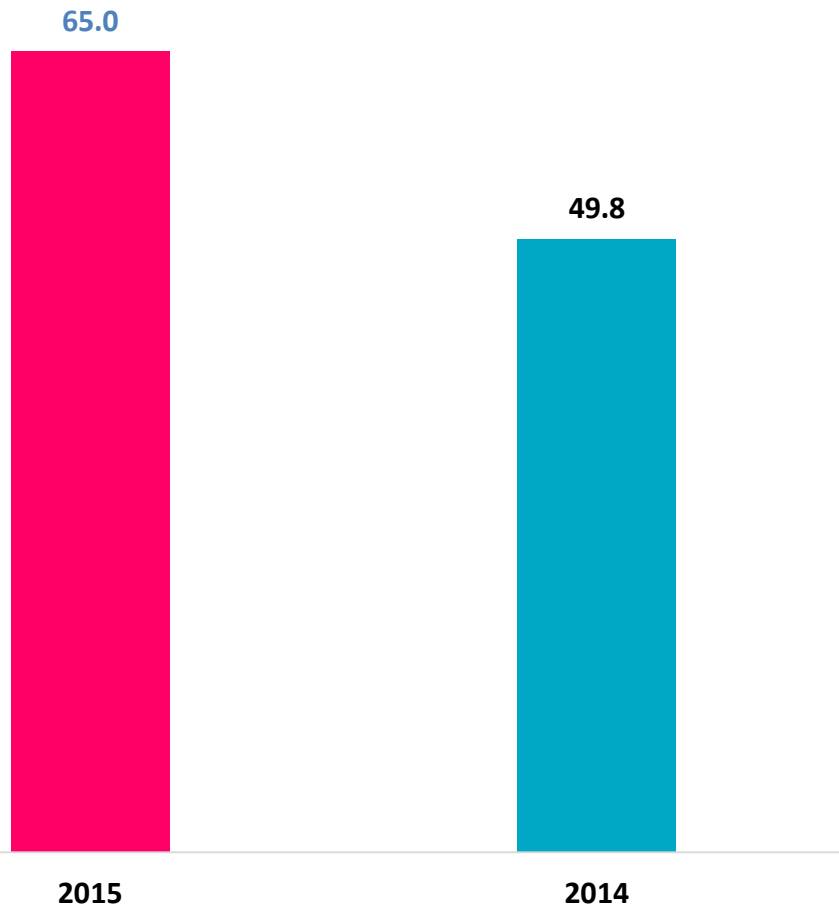


Chart 28: Ever used social media – age breakdown

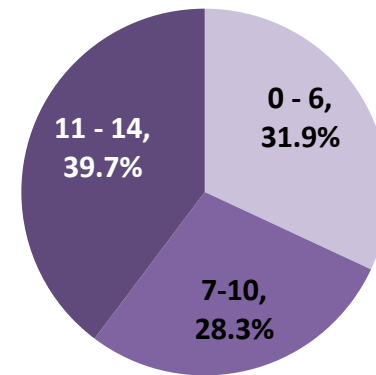
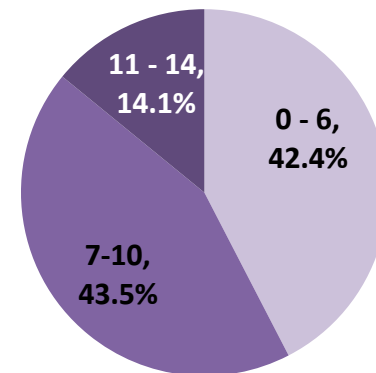


Chart 29: Age started using social media – age breakdown



Average Starting Age: 8.6 years old

YouTube overtook Facebook to become the most used social media network

- As children grew older, usage of social media networks increased and diversified.

Chart 30: Social media networks currently using (%)

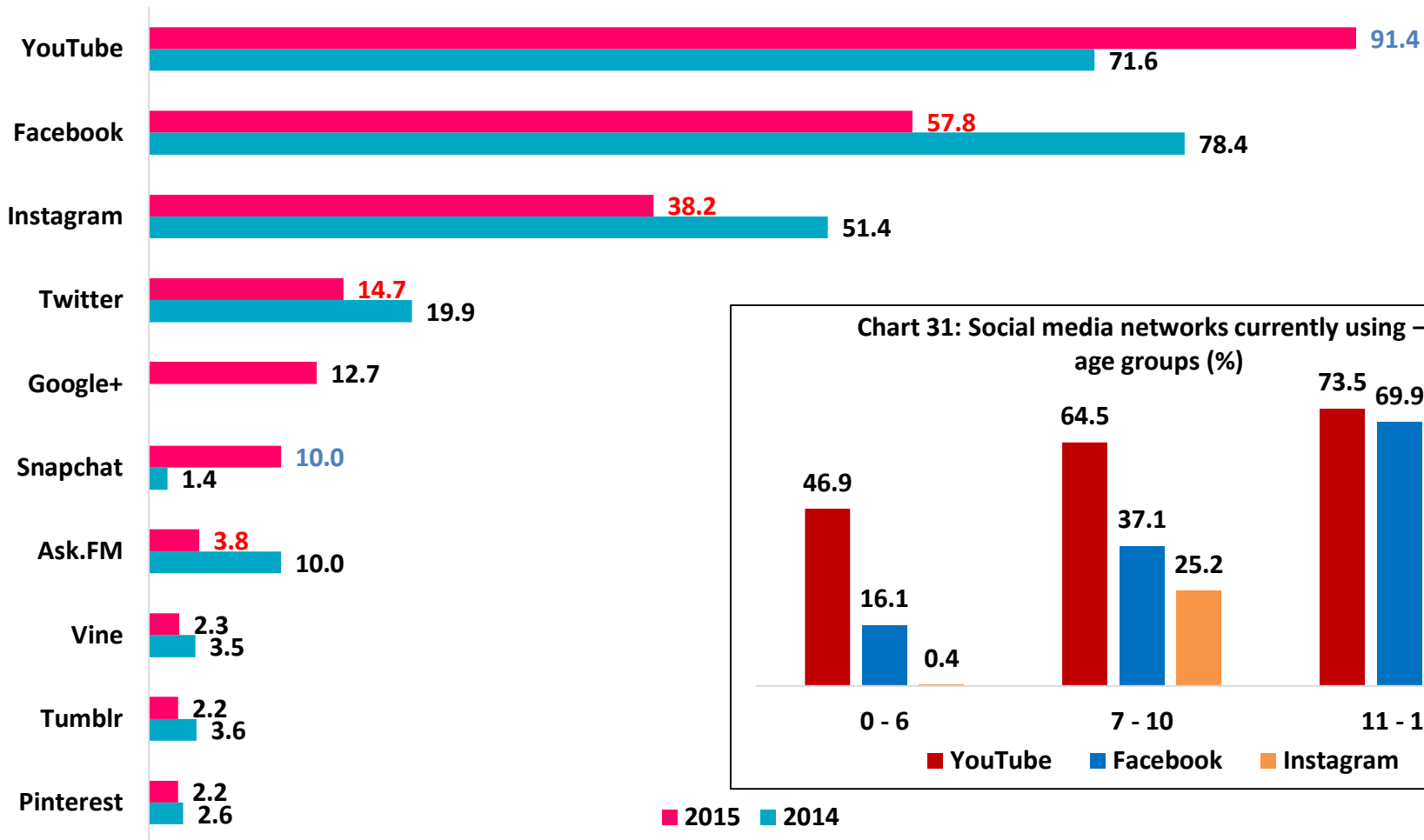
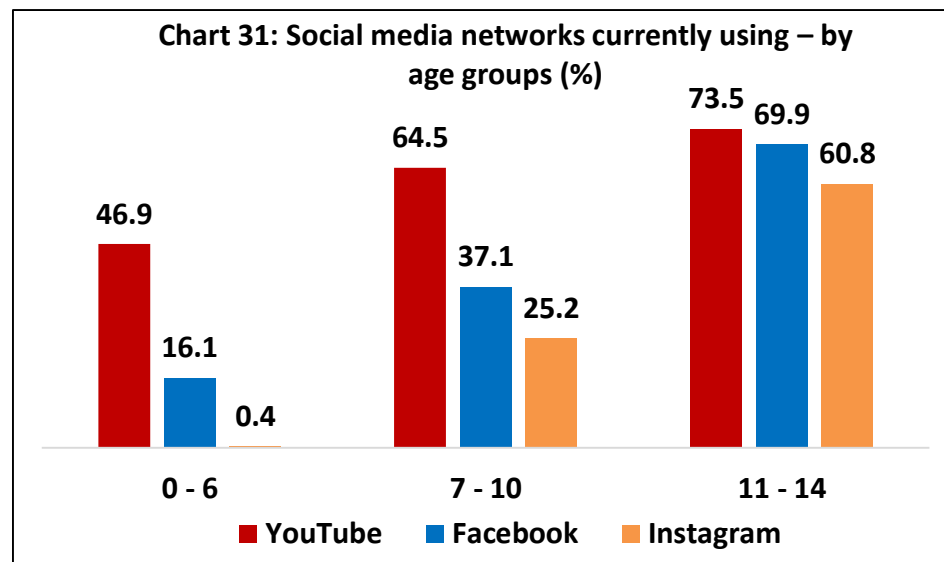


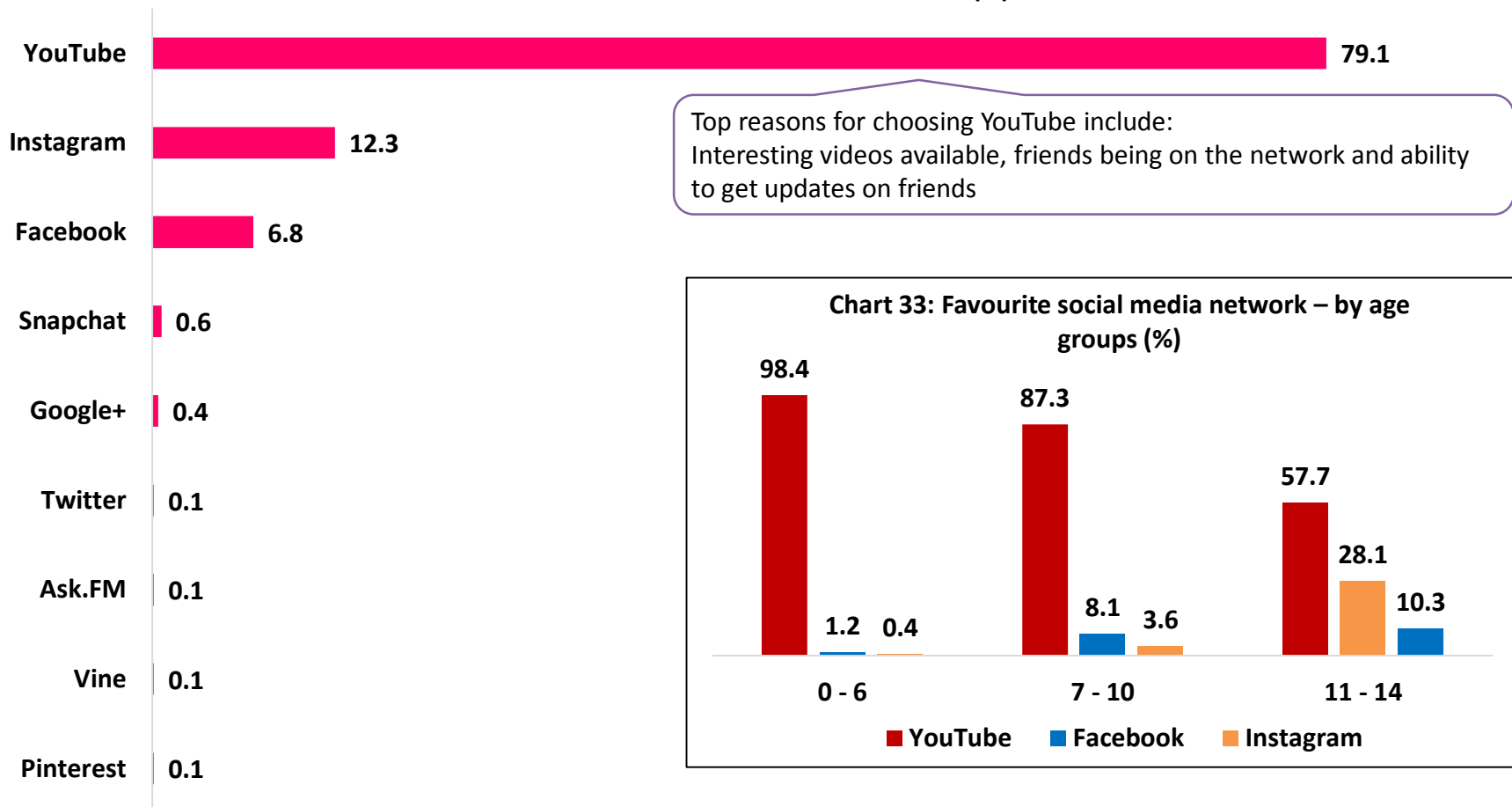
Chart 31: Social media networks currently using – by age groups (%)



YouTube was also the children's favourite social media network

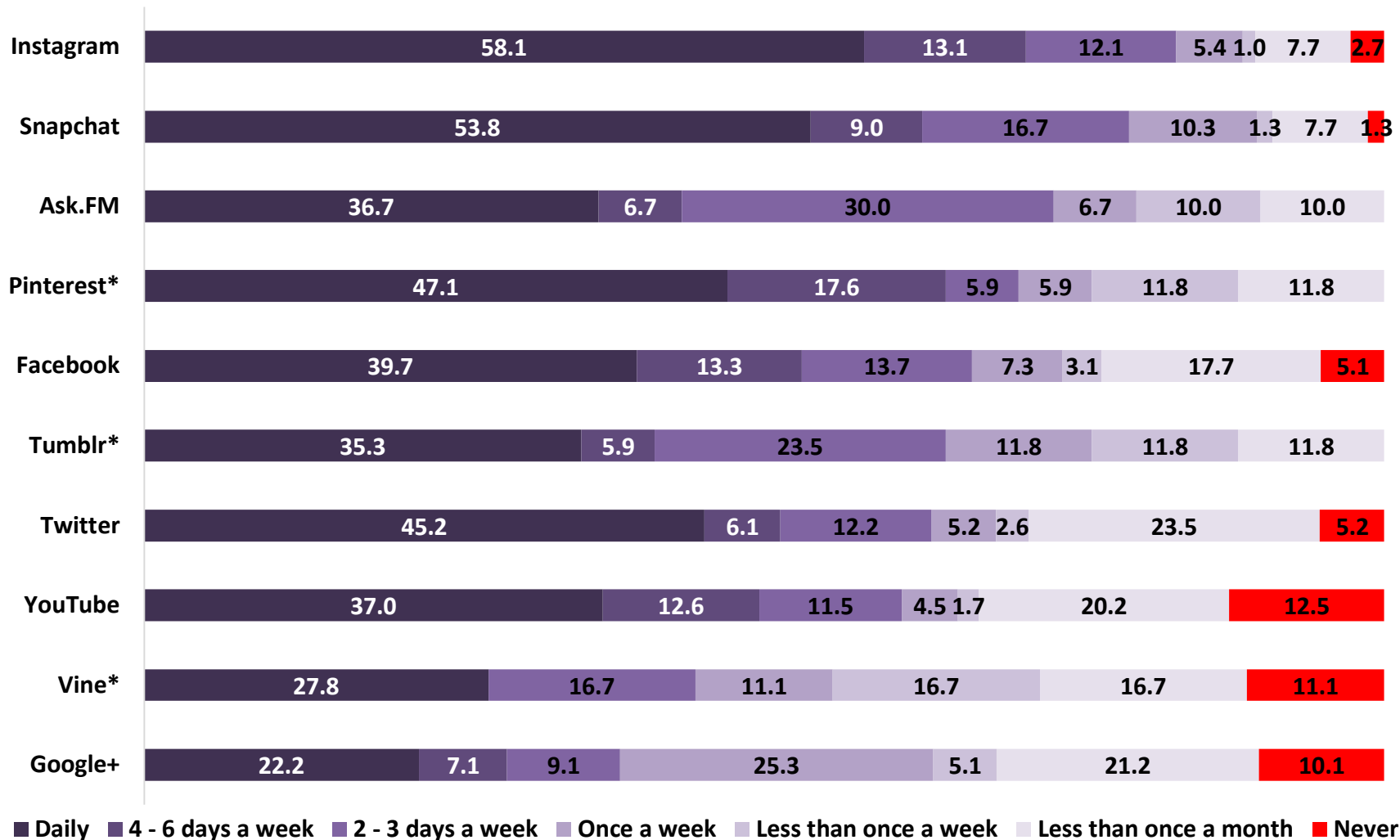
- While YouTube was consistently the favourite social media network, older children preferred Instagram over Facebook.

Chart 32: Favourite social media network (%)






Instagram was the social media network most frequently accessed via mobile devices

Chart 34: Frequency of using mobile devices to access social media networks (%)



Thank You

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