

MCA Market Research

Consumer Perception Survey Results – Broadcast

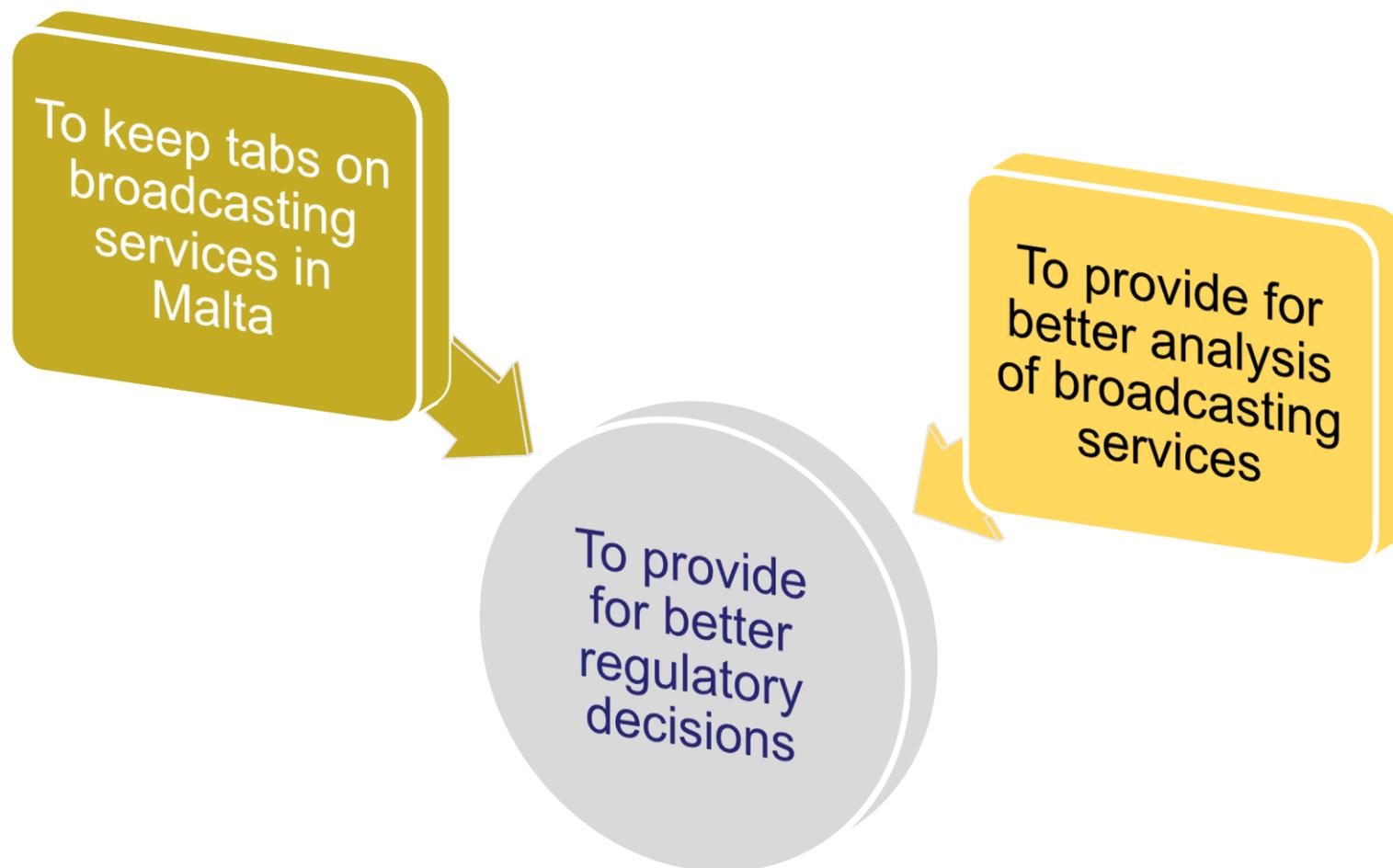
Malta Communications Authority
October 2011

Presentation Structure

1. Purpose and methodology
2. TV access in Maltese households
3. Type of TV connection
4. Internet TV
5. Digital audio broadcast plus (DAB+)

1. Purpose & Methodology

Purpose



*M. Fsadni & Associates carried out the survey in July 2011
on behalf of the MCA*

Fieldwork

Interviews were carried out by telephone using CATI, lasting around 5 minutes.

The survey respondents were chosen at random from GO's and Melita's Internet Telephone Directories.

Only one person per household was interviewed and all respondents were older than 18 years.

Sample

Targeted population was stratified according to the socio-economic classification of the Maltese population, based on the 2011 Q1 Labour Force Survey.

The interviews were also equally distributed among Malta's six official geographic regions.

Responses

801 net respondents

Any refusals / incomplete surveys were re-allocated to achieve a net sample of 800 interviewees.

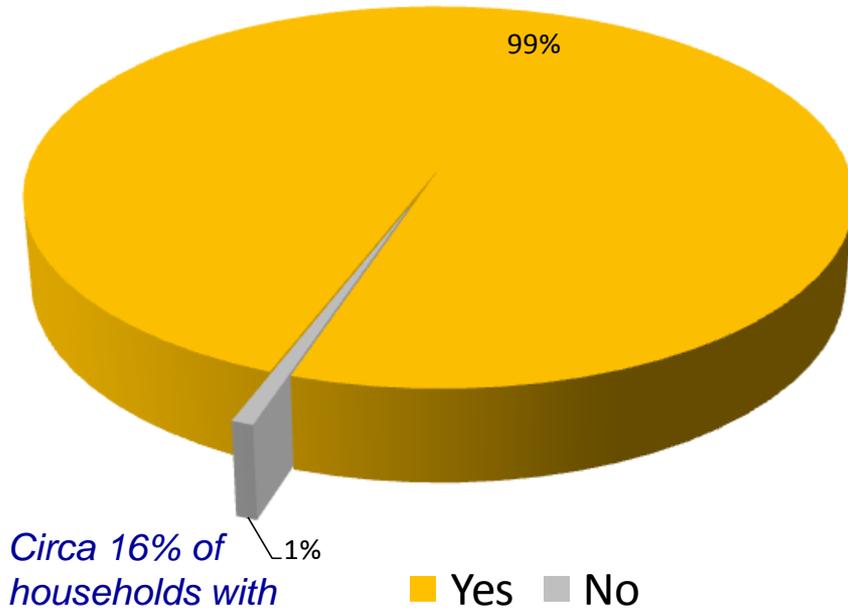
Margin of error 3.45% at 95% confidence interval.

2. TV Access in Maltese Households

Number of TV Sets in Maltese Households

Do you have a TV set at home?

Sample Size – 801

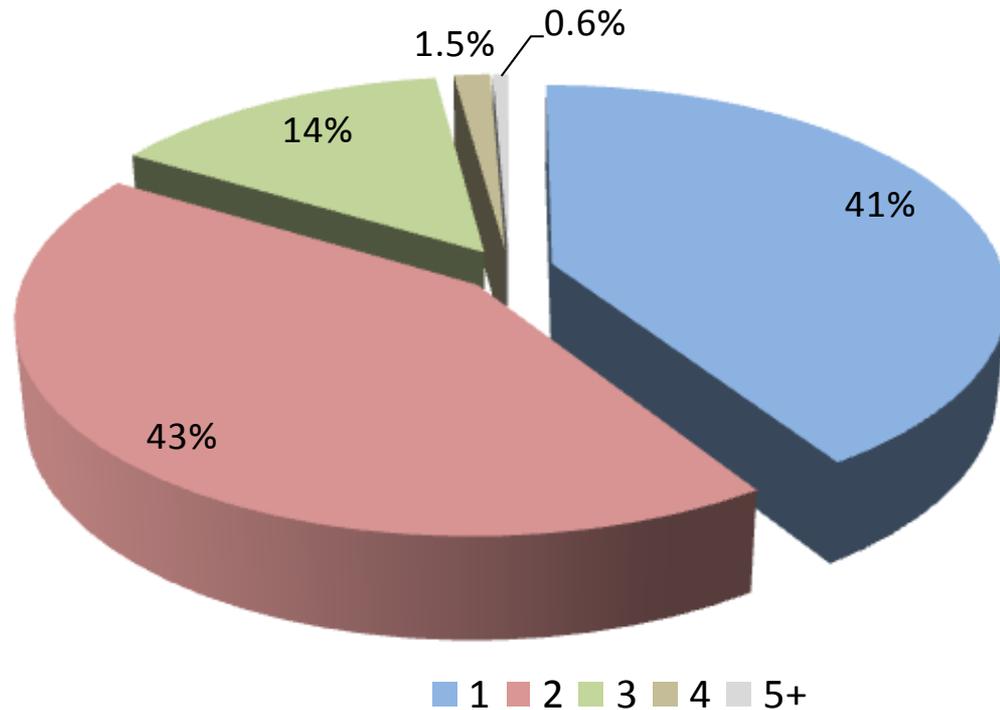


Circa 16% of households with no TV sets make use of internet TV

■ Yes ■ No

How many TV sets do you have?

Sample Size – 795

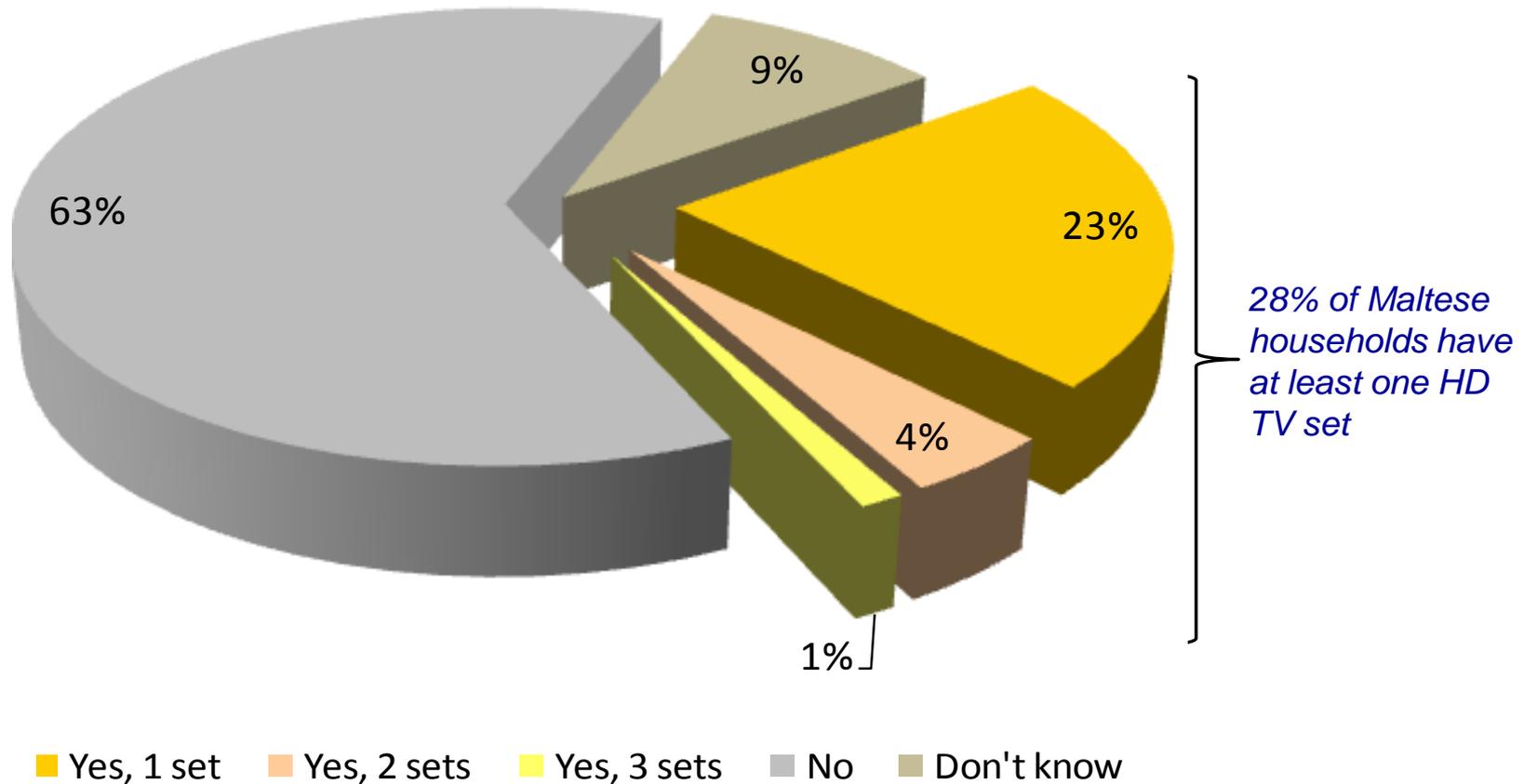


■ 1 ■ 2 ■ 3 ■ 4 ■ 5+

Type of TV Sets in Maltese Households

Do you have a High Definition TV? If so, how many?

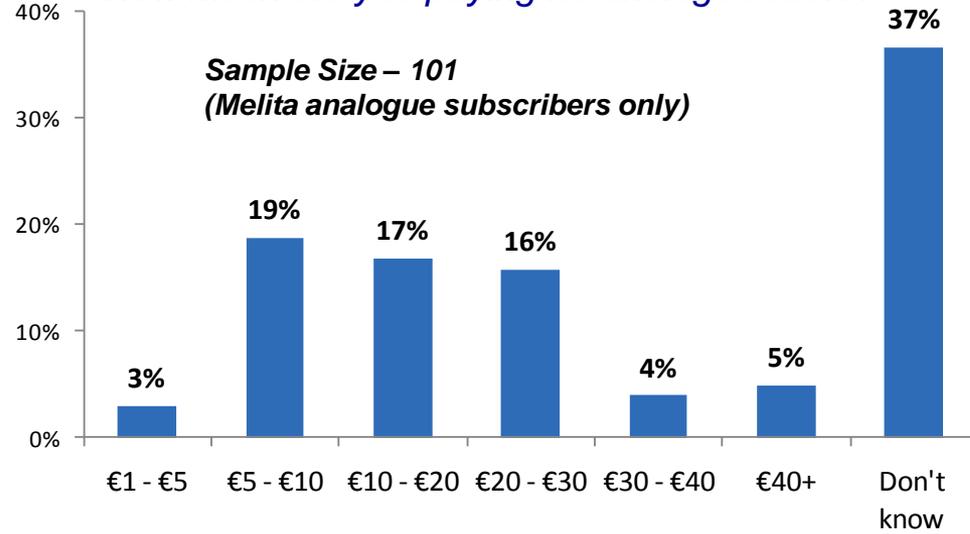
Sample Size – 795



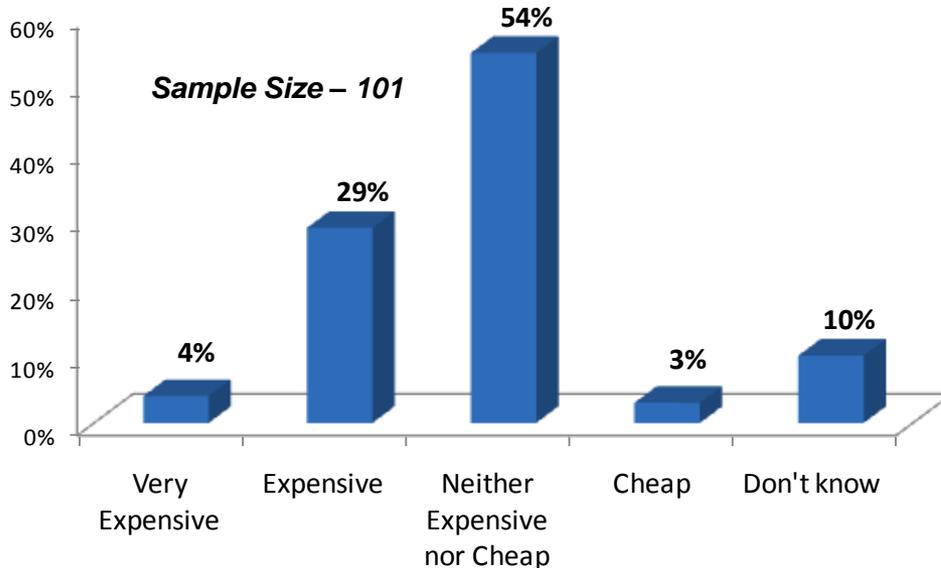
3. Type of TV Connection

Melita Analogue Service

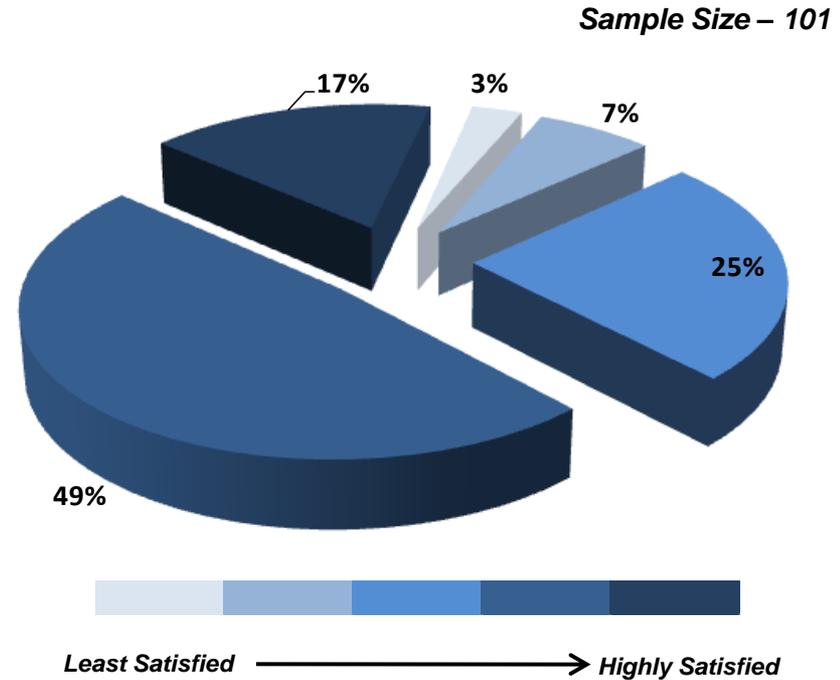
How much are you paying for analogue cable?



Do you consider the cost to be...

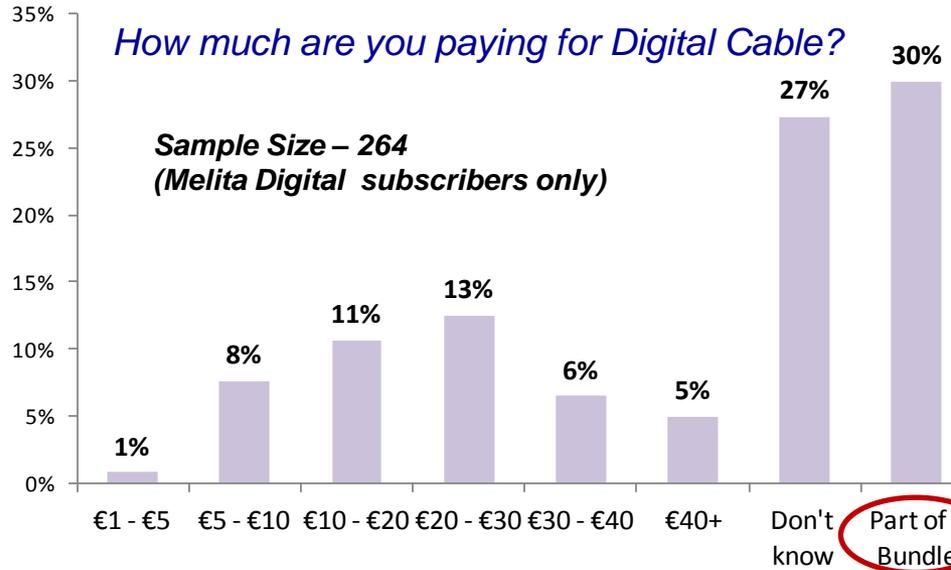


How satisfied are you with the quality of the Melita Analogue service?



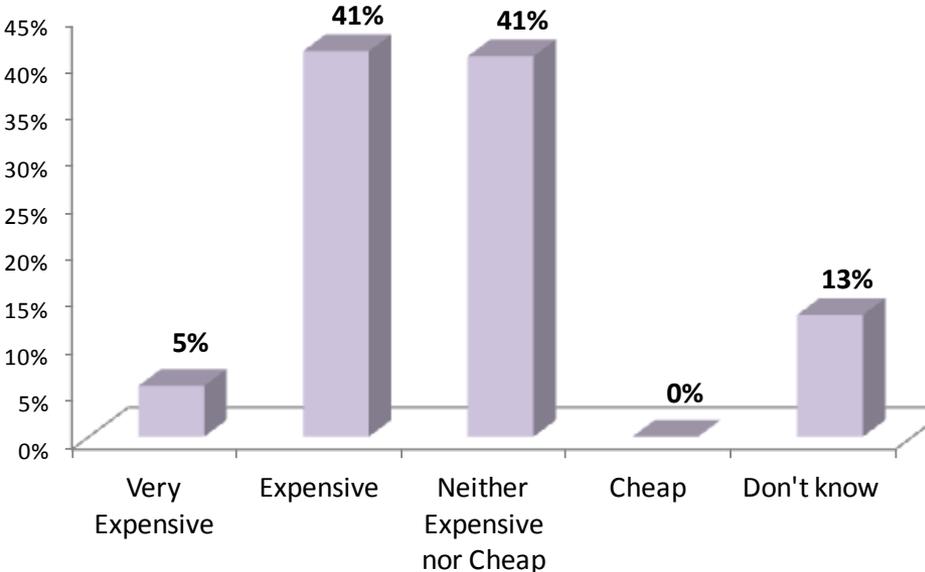
66% are highly satisfied / satisfied with the Melita Analogue service

Melita Digital Service – Price Analysis



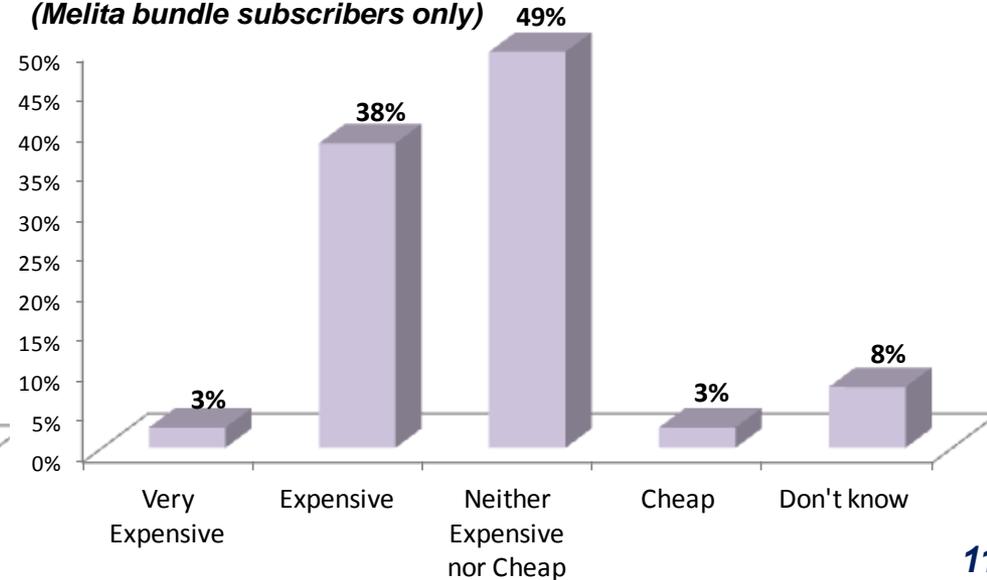
Do you consider the cost to be...

**Sample Size – 185
(excl. Melita bundle subscribers)**



Do you consider the cost of the bundle to be...

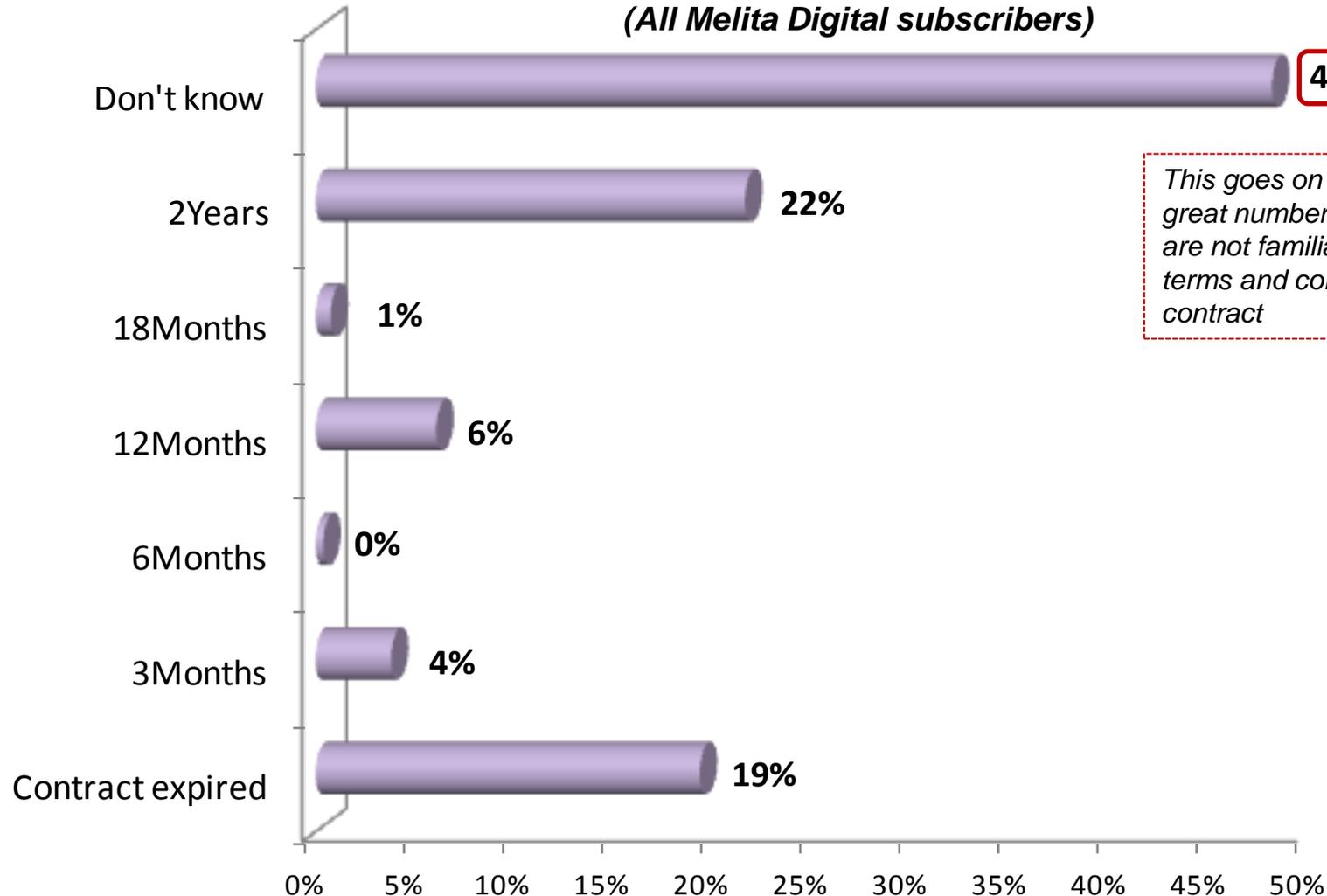
**Sample Size – 79
(Melita bundle subscribers only)**



Melita Digital Service – Subscription Period

For how long does your contract bind you before being able to terminate or switch service?

**Sample Size – 264
(All Melita Digital subscribers)**



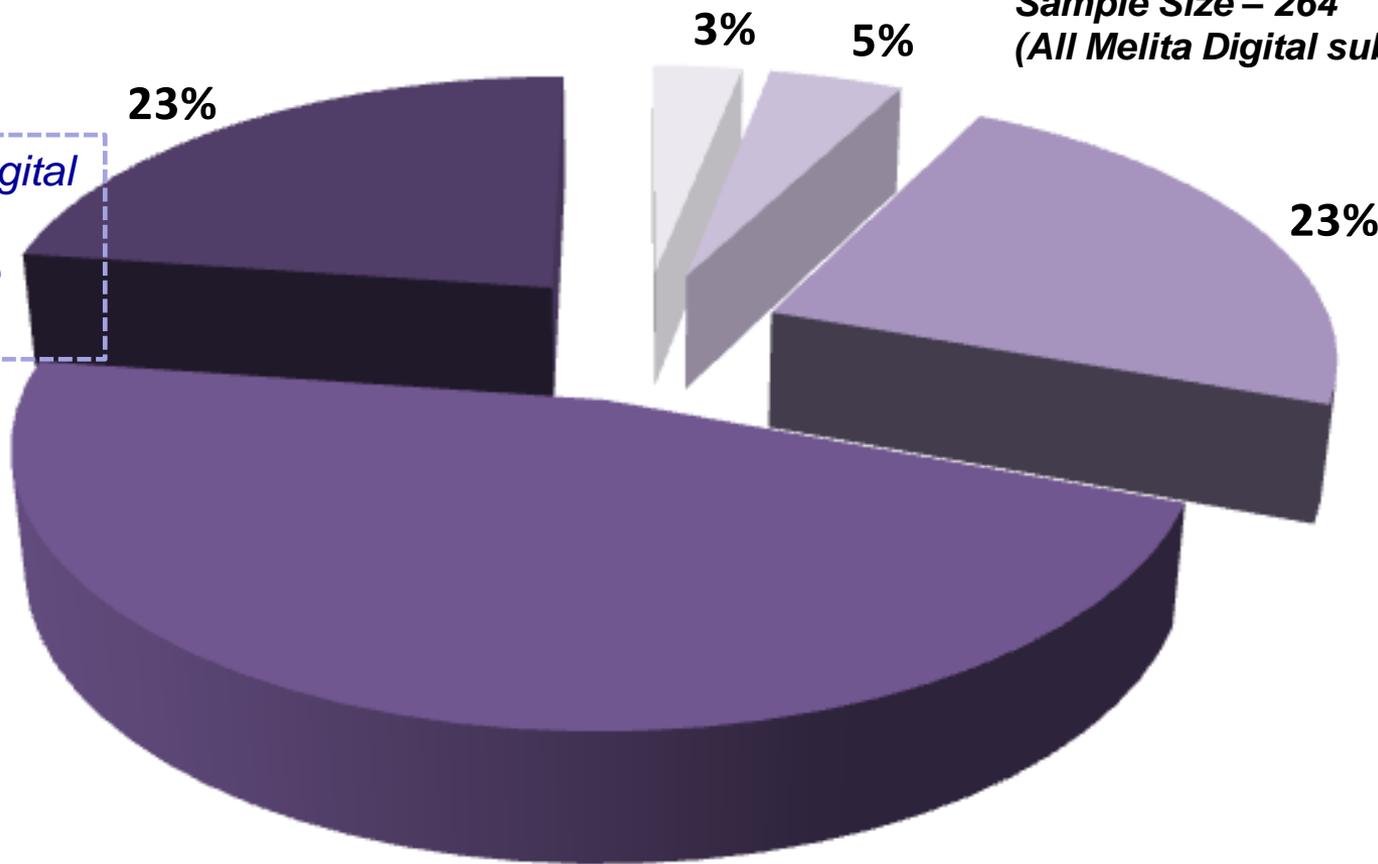
This goes on to show that a great number of households are not familiar with the basic terms and conditions of their contract

Melita Digital Service – Satisfaction Levels (1)

How satisfied are you with the quality of the Melita Digital service?

Sample Size – 264
(All Melita Digital subscribers)

70% of Melita Digital subscribers are satisfied with the service



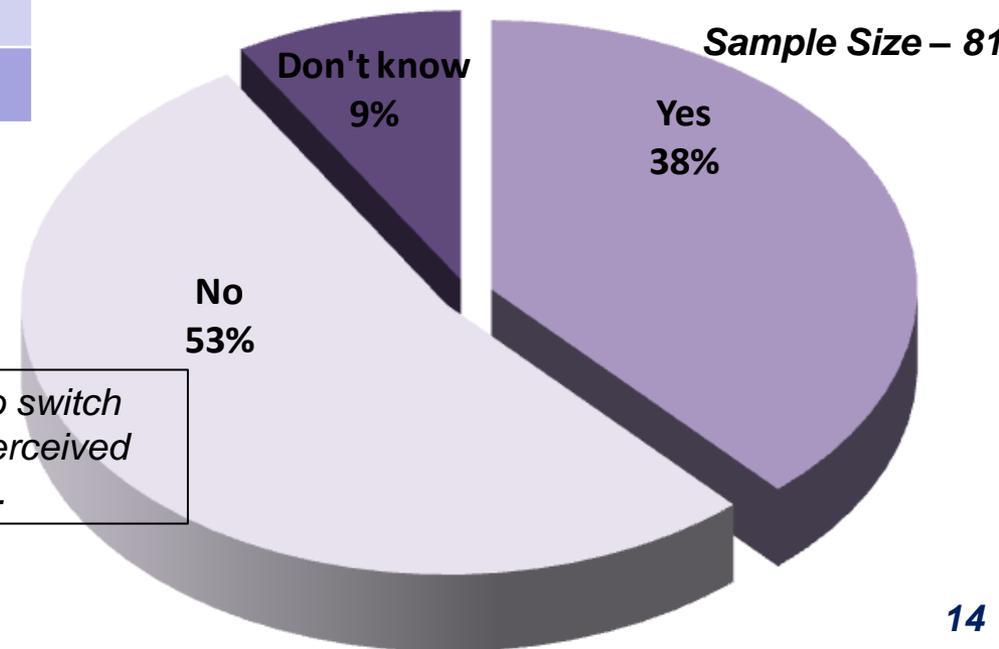
Melita Digital Service – Satisfaction Levels (2)

1.) Why are you not satisfied?

<i>Reasons Stated</i>	% of Unsatisfied Households
Frequent Disconnections	22%
Channel Line-up**	67%
Billing Issues	11%
Bad Customer Care	12%
Other Reasons	19%

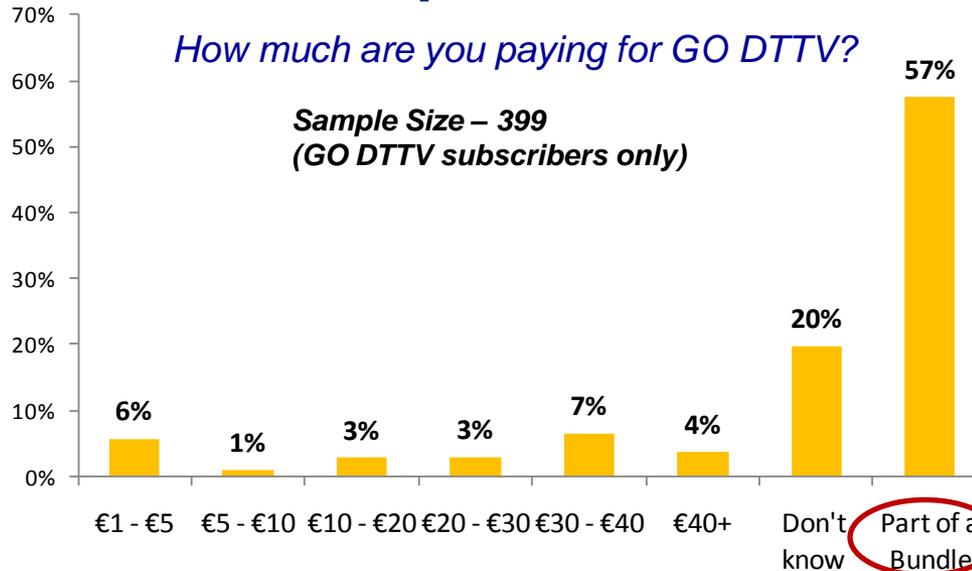
*** Common complains under this category include: frequent repetition of programmes and the removal of important sports matches from the cable digital service*

2.) Therefore are you considering changing your TV channel provider?



Mainly because it is inconvenient to switch and because other providers are perceived to offer the same quality of service .

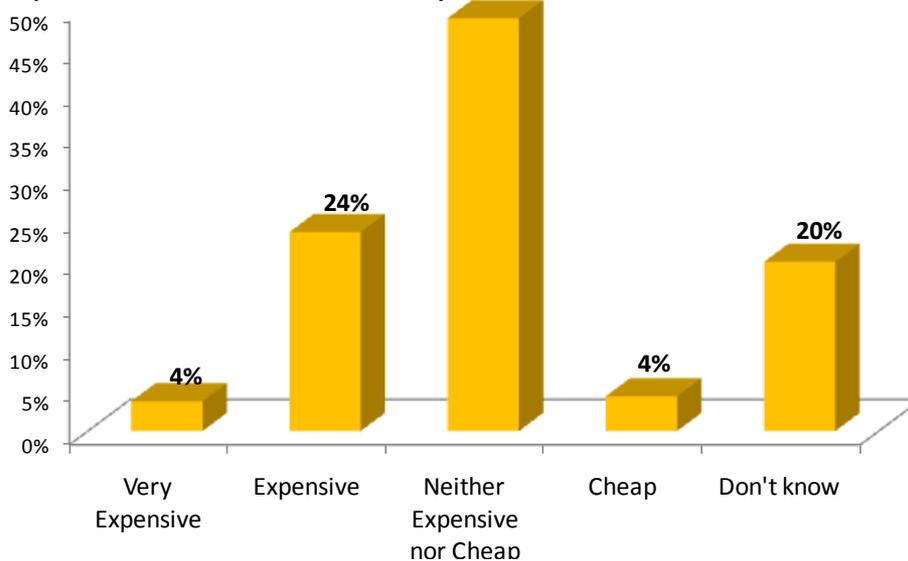
GO DTTV Service – Price Analysis



Do you consider the cost to be...

Sample Size – 170

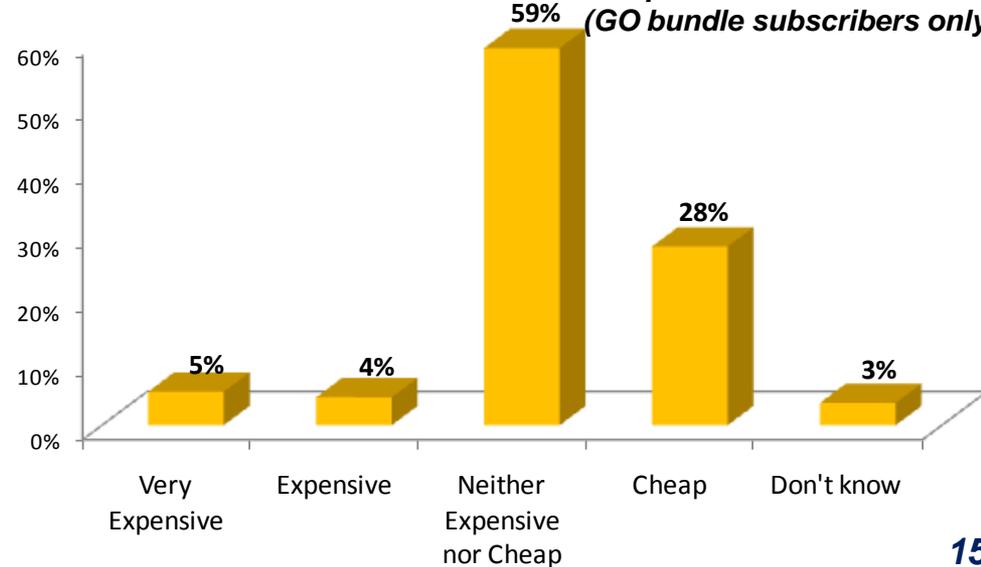
(excl. GO bundle subscribers)



Do you consider the cost of the bundle to be...

Sample Size – 229

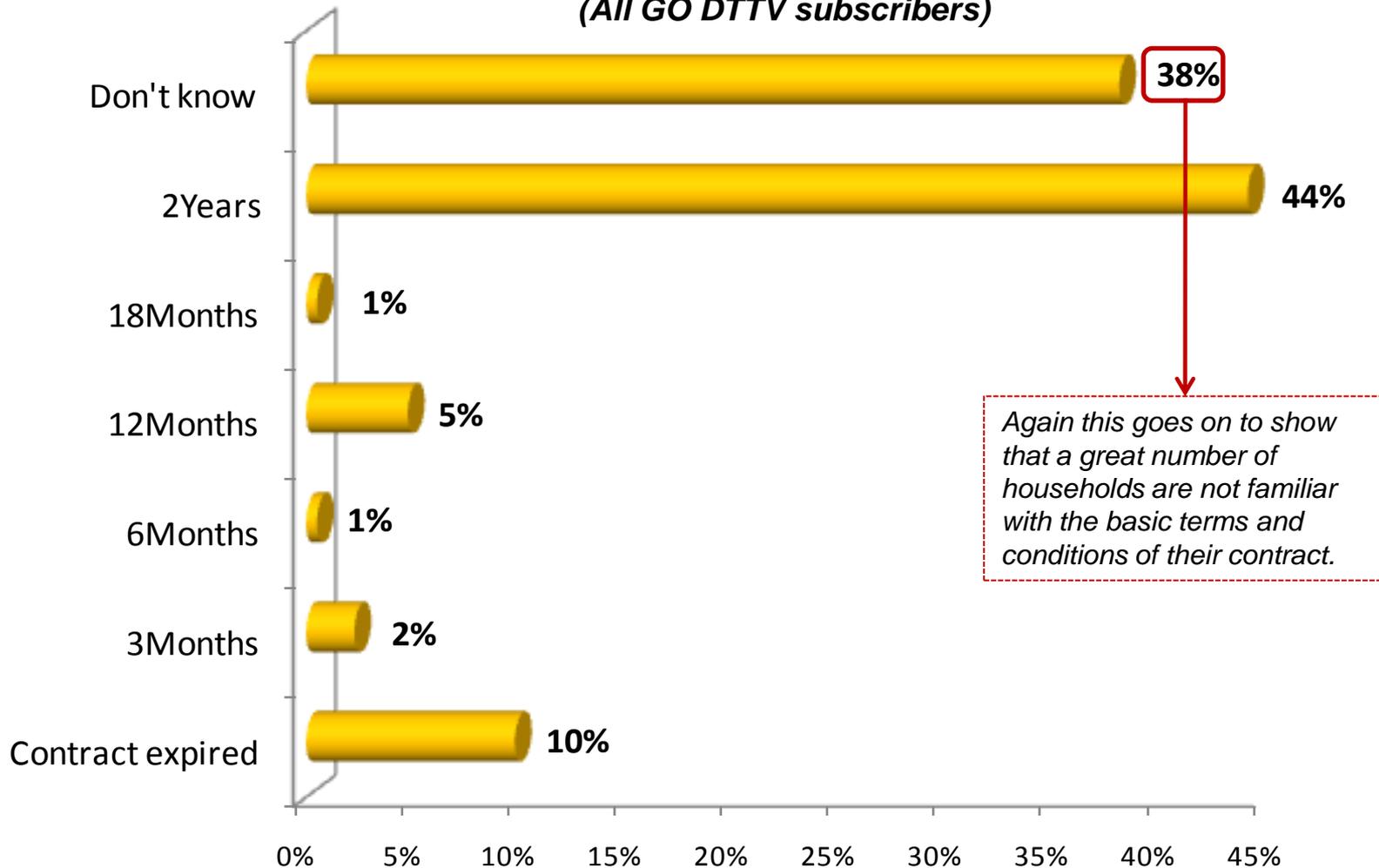
(GO bundle subscribers only)



GO DTTV Service – Subscription Period

For how long does your contract bind you before being able to terminate or switch service?

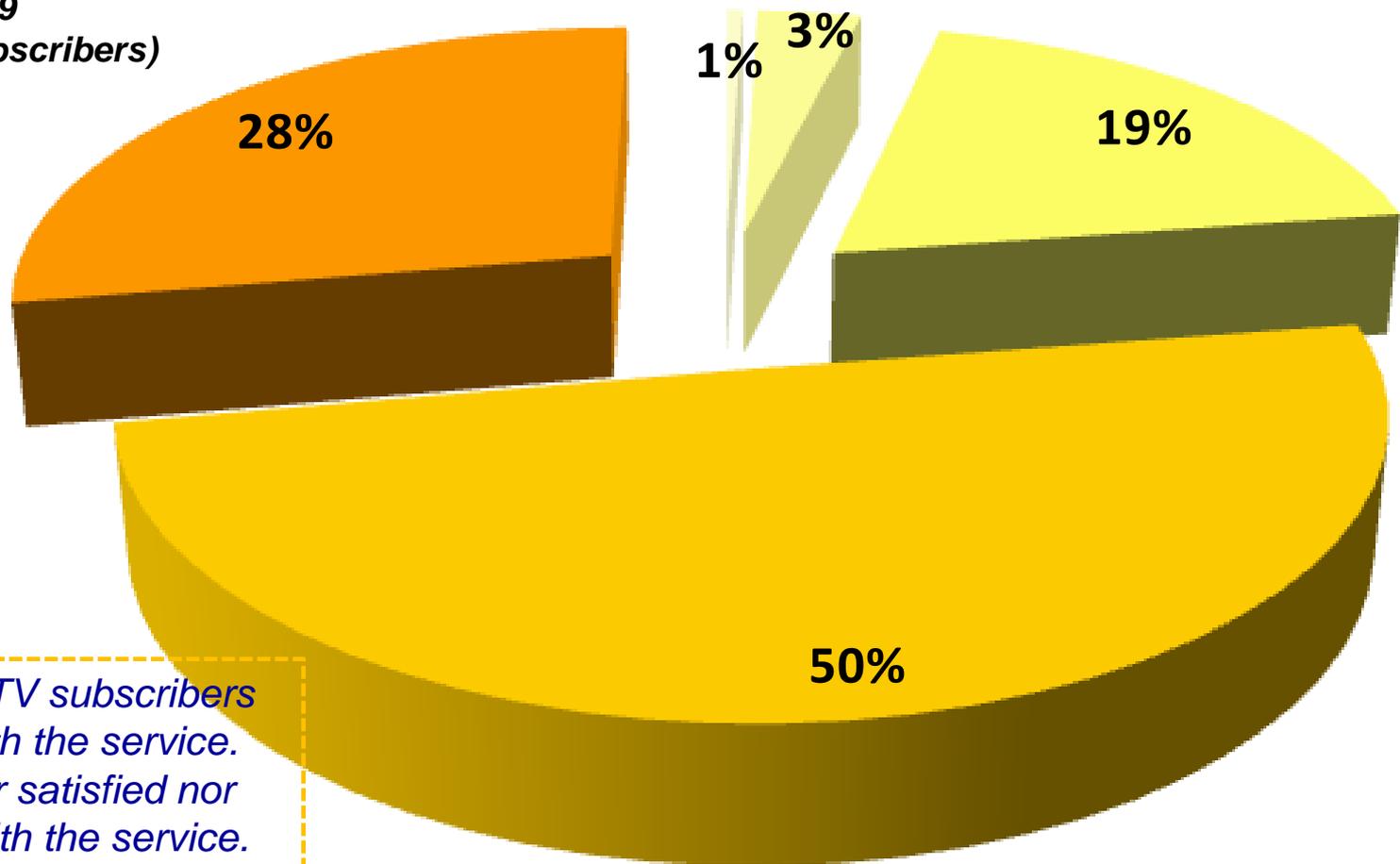
**Sample Size – 399
(All GO DTTV subscribers)**



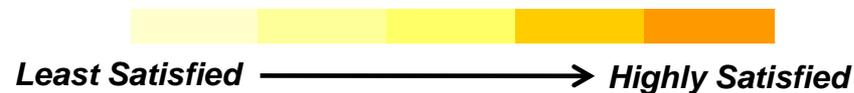
GO DTTV Service – Satisfaction Levels (1)

How satisfied are you with the quality of the GO DTTV service?

Sample Size – 399
(All GO DTTV subscribers)



78% of GO DTTV subscribers are satisfied with the service. 19% are neither satisfied nor disappointed with the service.



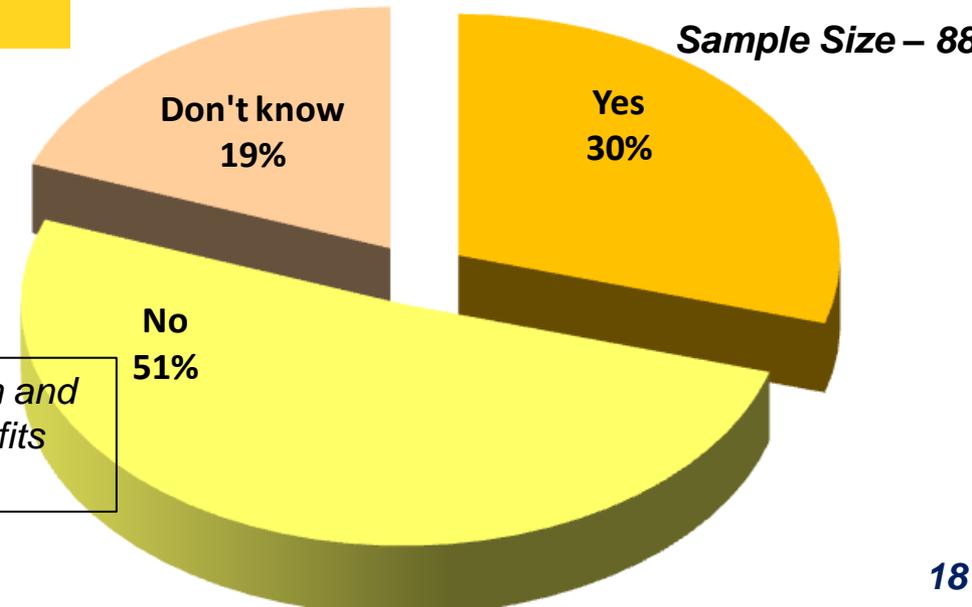
GO DTTV Service – Satisfaction Levels (2)

1.) Why are you not satisfied?

Reasons Stated	% of Unsatisfied Households
Frequent Disconnections	26%
Channel Line-up**	57%
Billing Issues	6%
Bad Customer Care	11%
Other Reasons	22%

*** Common complains under this category include: frequent repetition of programmes and the removal of channels such as LIVING etc.*

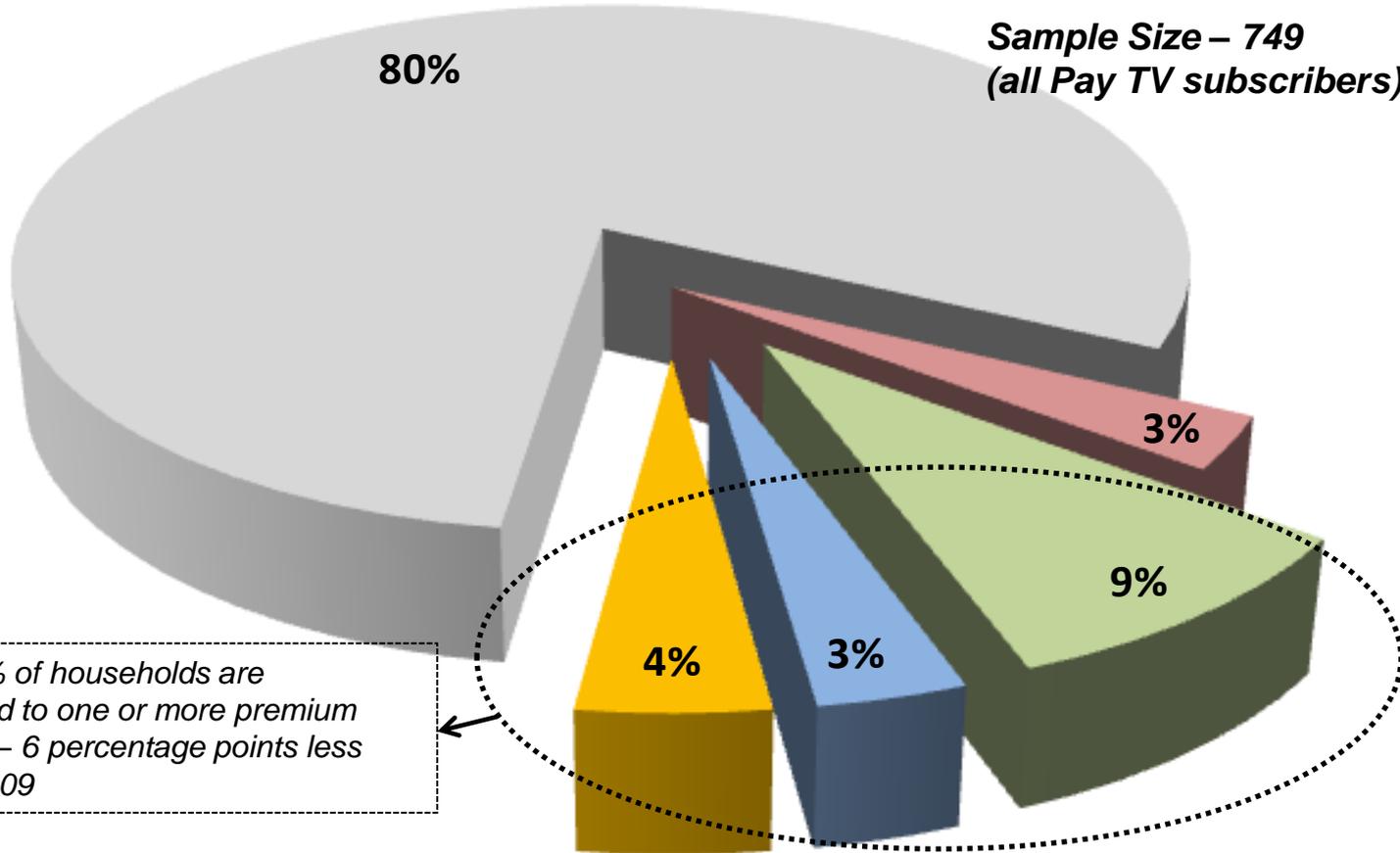
2.) Therefore are you considering changing your TV channel provider?



Mainly because it is inconvenient to switch and because for some the overall bundle benefits exceed their TV service requirements.

Are you subscribed to any premium channels?

Sample Size – 749
(all Pay TV subscribers)



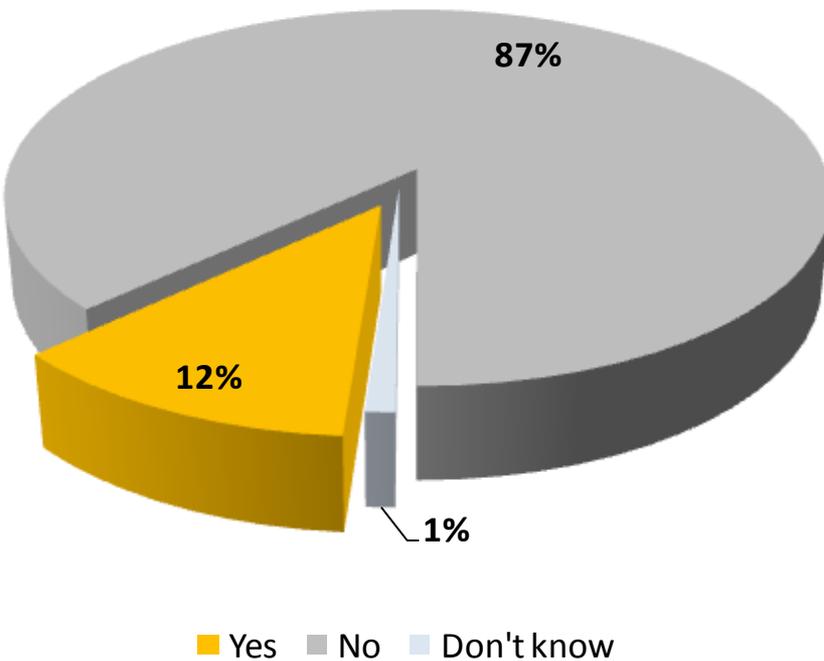
Circa 16% of households are subscribed to one or more premium channels – 6 percentage points less than in 2009

■ Sports Channel ■ Movie Channel ■ Both ■ No ■ Don't know

Movements in the type of TV connection (1)

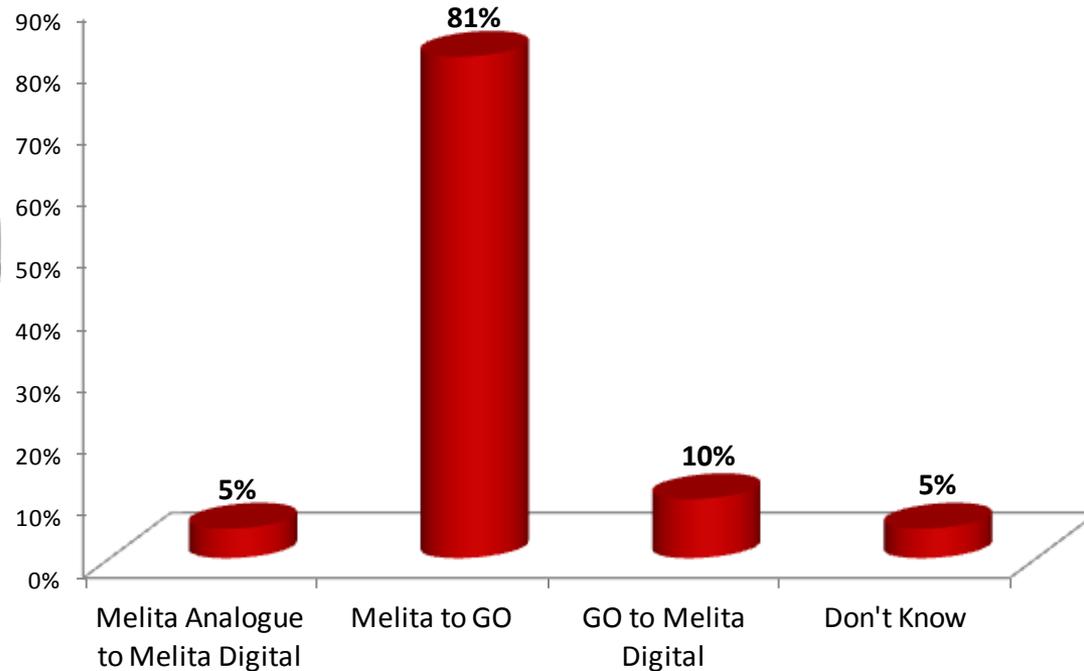
Did you switch from one type of TV connection to another over the last two years?

*Sample Size – 706
(Respondents subscribed to one operator only)*



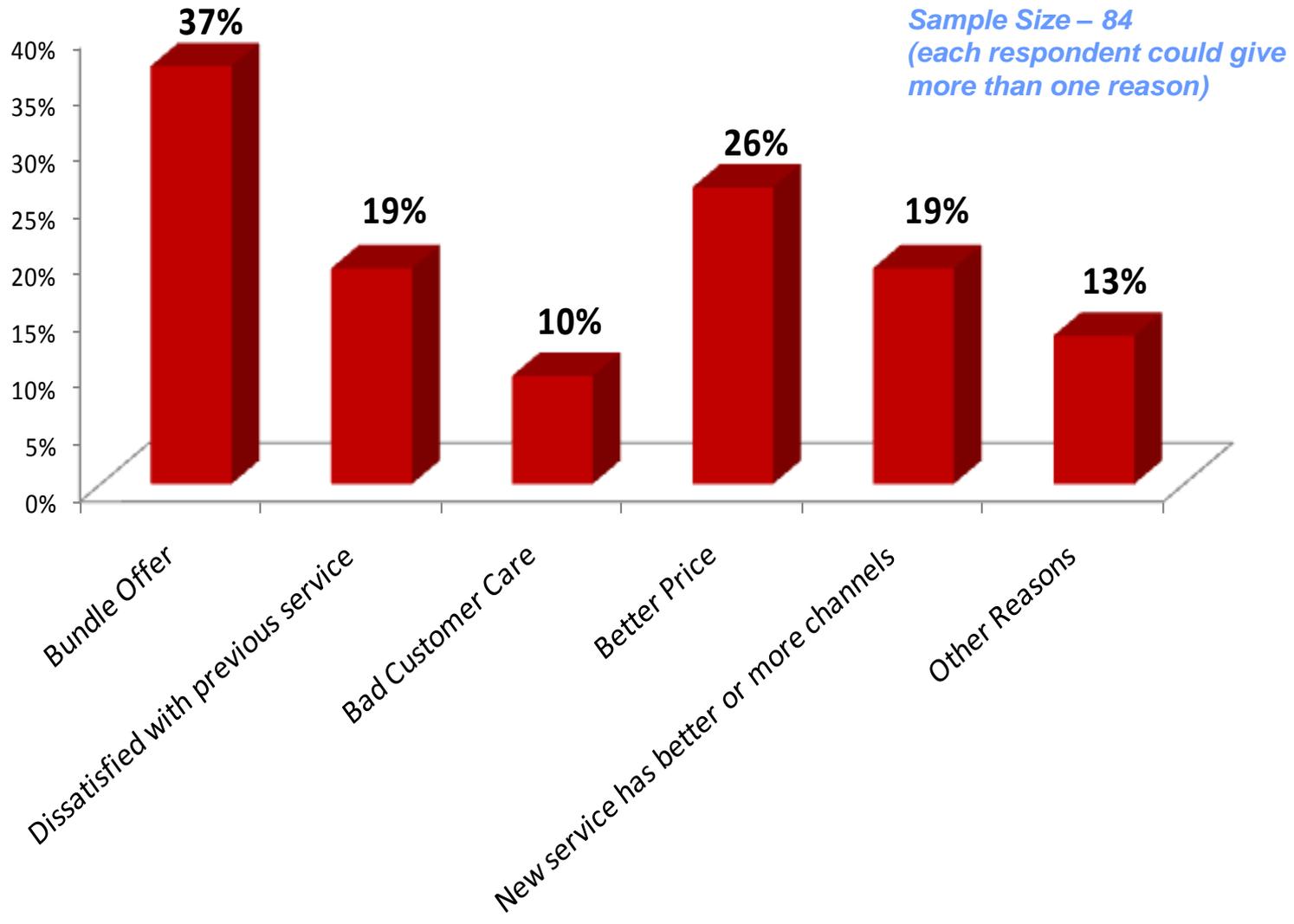
If yes, what was your previous connection?

Sample Size – 84



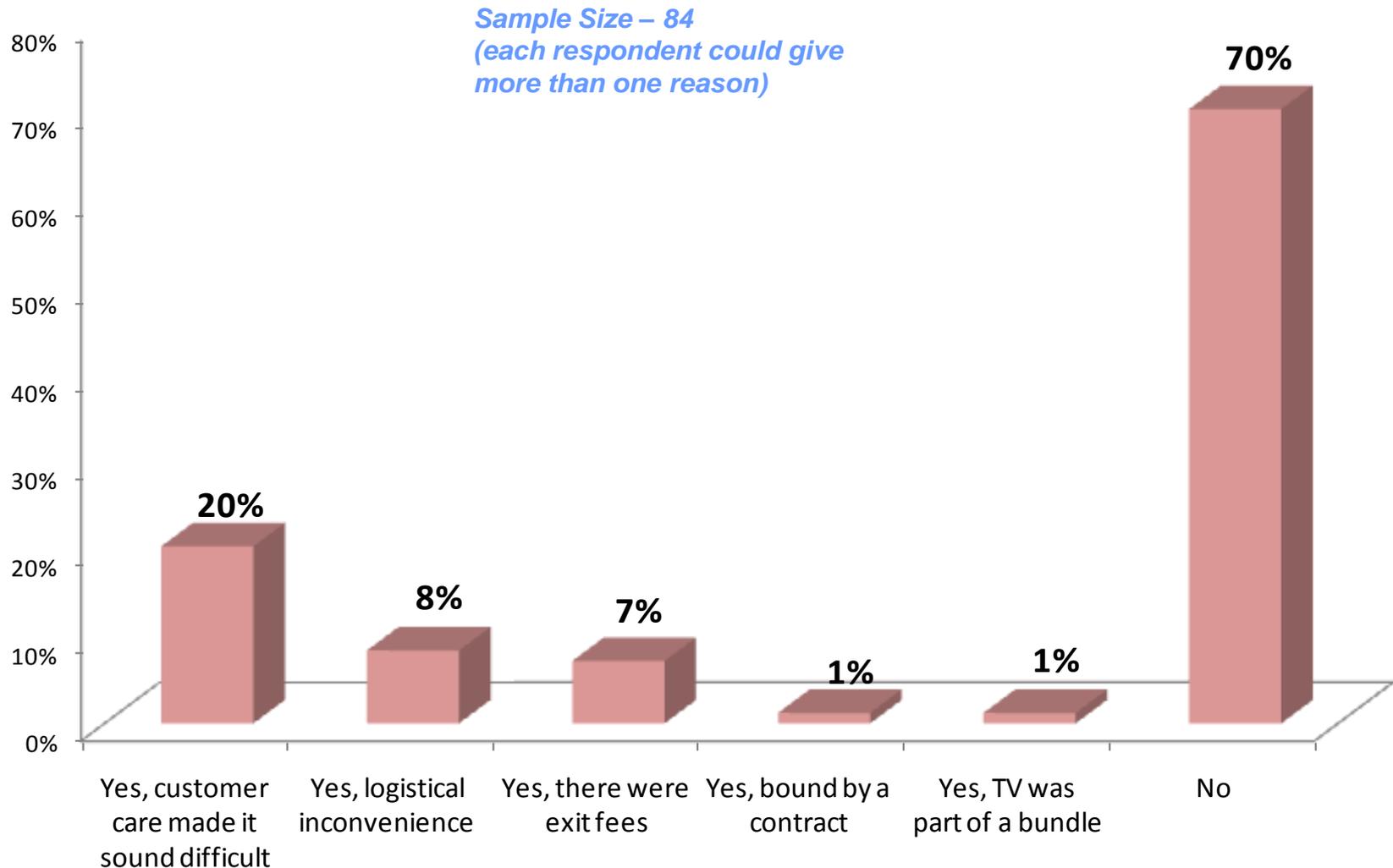
Movements in the type of TV connection (2)

What was the reason for changing the operator?



Movements in the type of TV connection (3)

Did you find it difficult to change the operator?

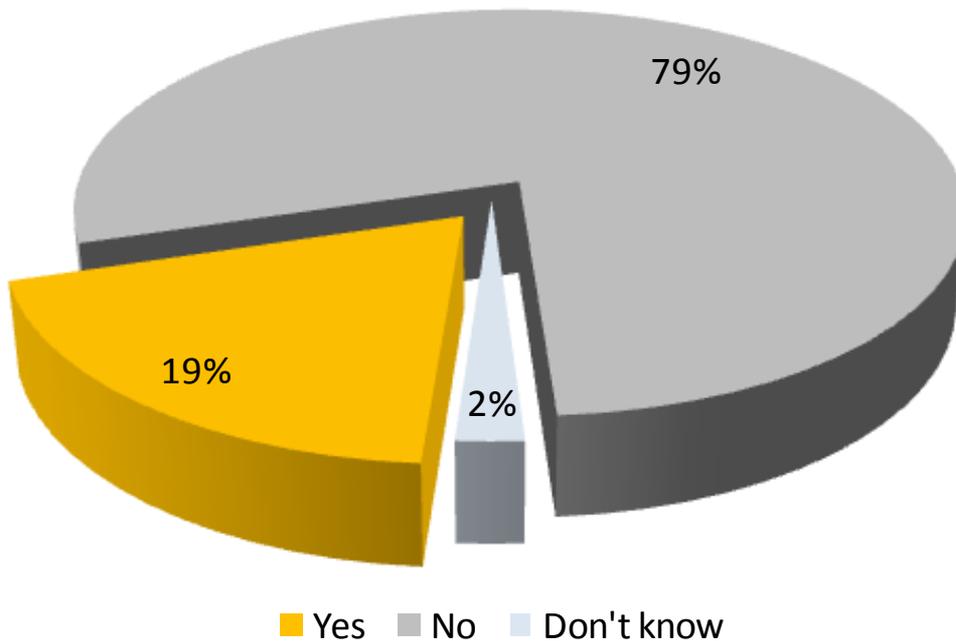


4. Internet TV

Use of Internet TV (1)

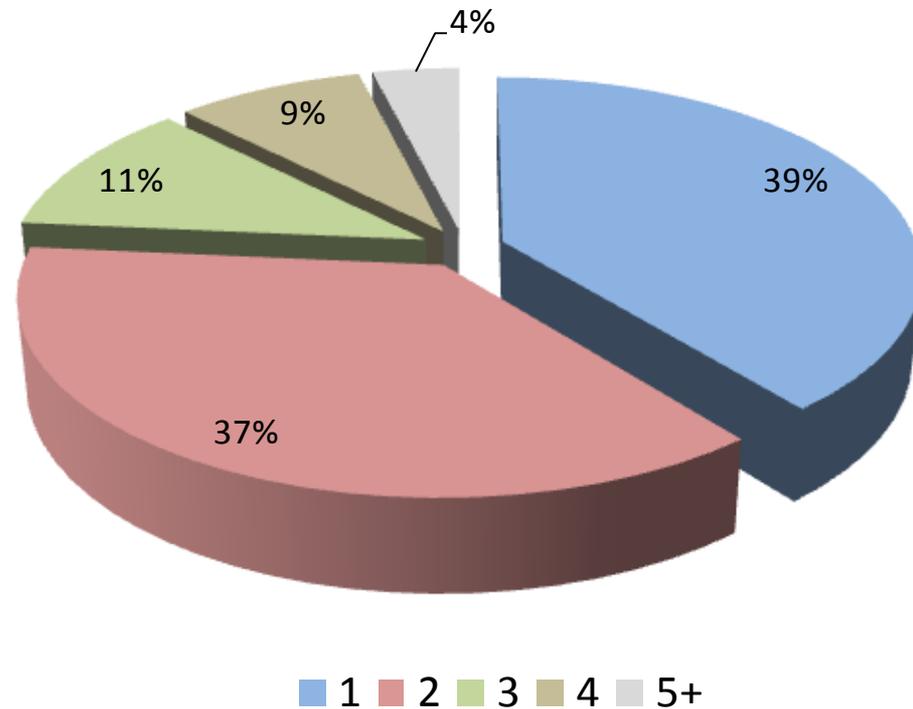
Do you use internet to watch TV?

Sample Size – 801



The number of members per household making use of internet TV...

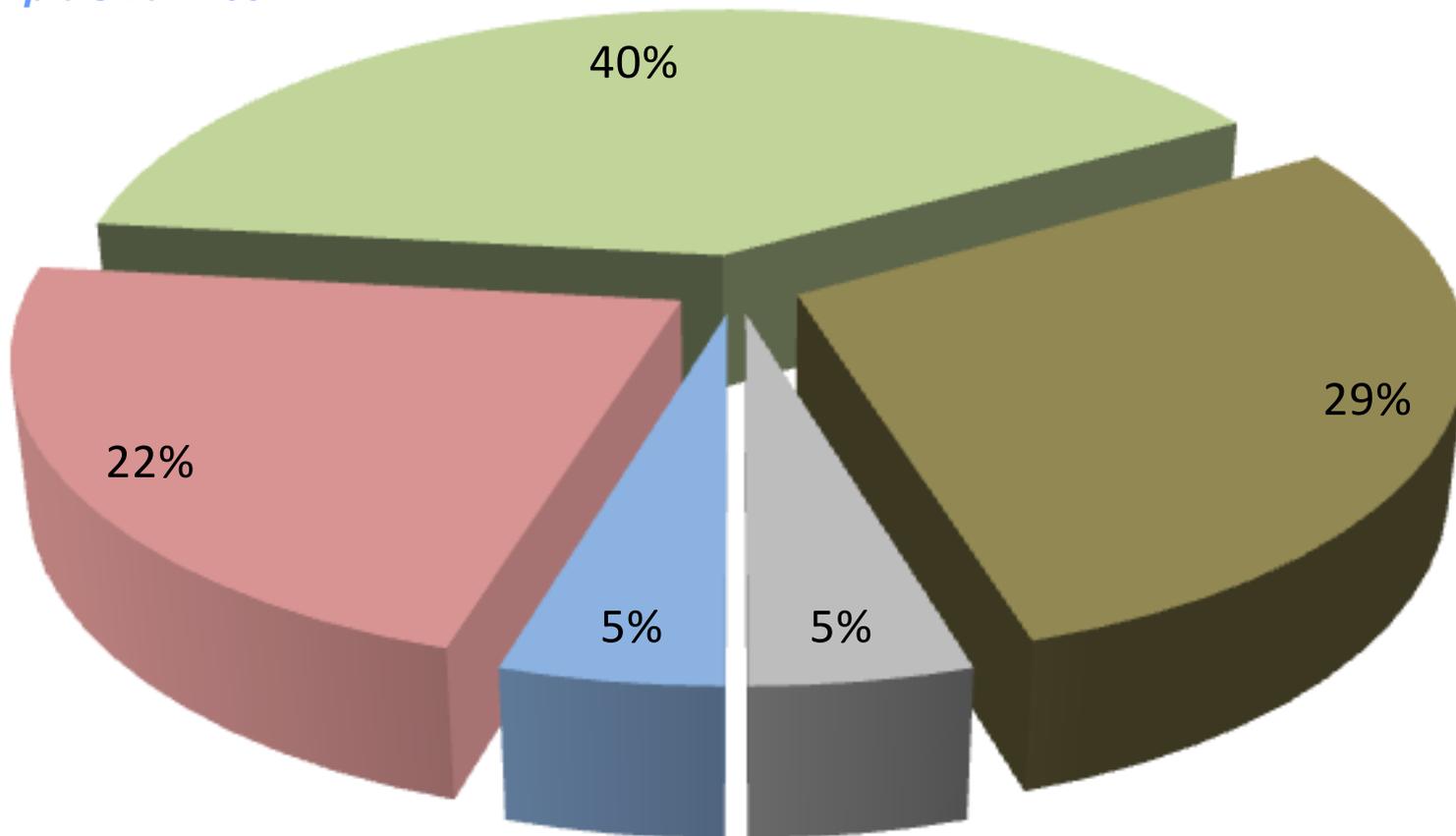
Sample Size – 153



Use of Internet TV (2)

Do you view internet TV as a good substitute to traditional TV?

Sample Size – 153

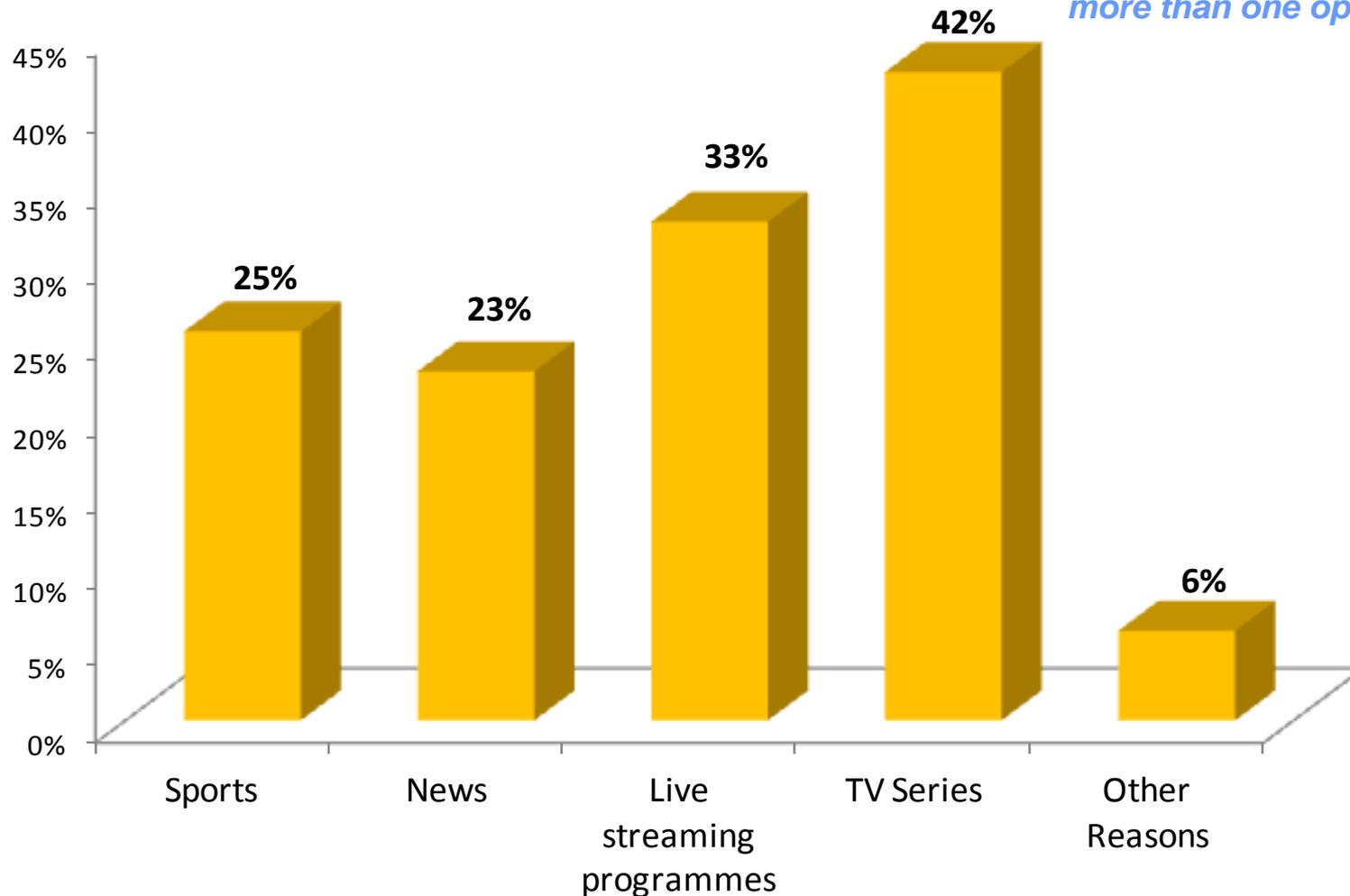


Always Often Sometimes Rarely Never

Use of Internet TV (3)

What do you watch most via internet TV?

*Sample Size – 153
(each respondent could give more than one option)*

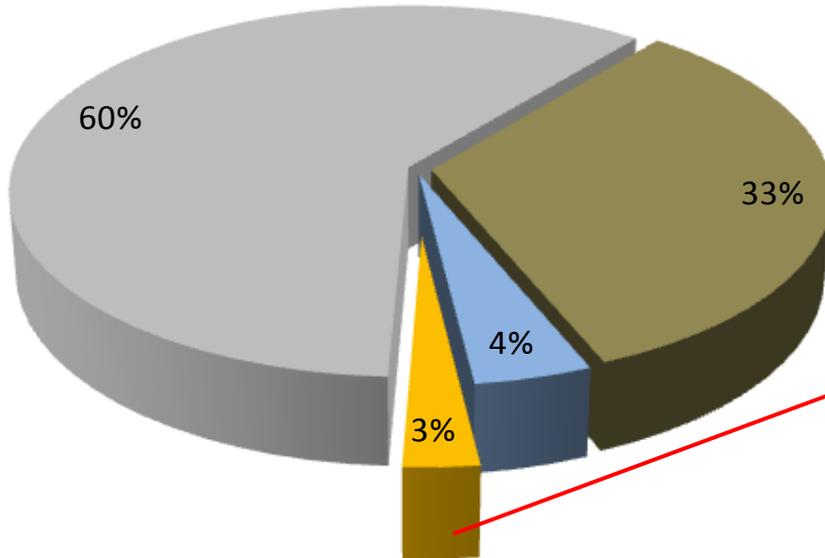


5. Digital Audio Broadcast plus

Digital Audio Broadcast plus

Do you have a DAB+ radio set ?

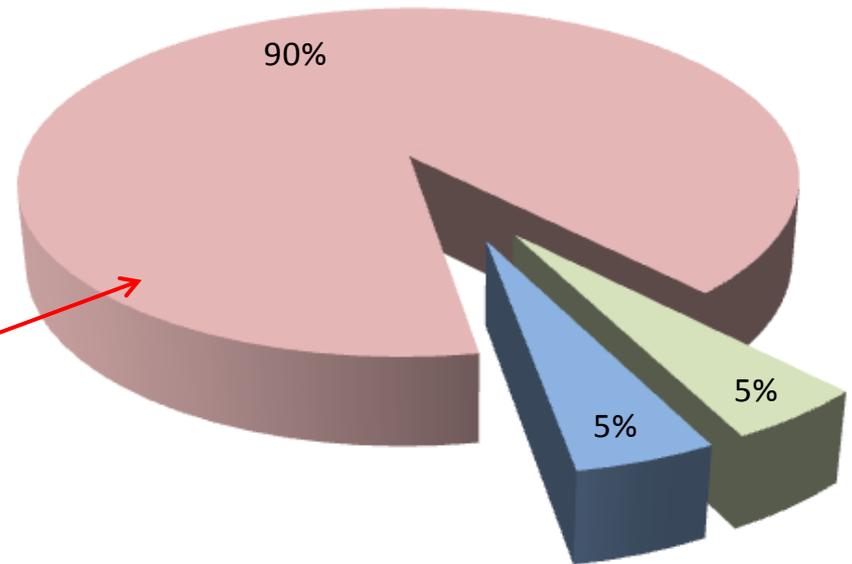
Sample Size – 801



■ Yes ■ No ■ Never heard of it ■ Don't know

Where is the DAB+ radio set situated?

Sample Size – 21



■ In the car ■ At home ■ Both in the car & at home

More than 50% of households who have a DAB+ radio set are highly satisfied with the quality of service it provides

10% of households claim they are not satisfied, while 24% are just about satisfied with the DAB+ quality of service



www.mca.org.mt