

MCA Market Research

*Consumer Perception Survey Results –
Broadcasting Services*

MCA | January 2016

1. Purpose & Methodology

Keep tabs on
broadcasting services in
Malta

Provide for better
analysis of broadcasting
services

Provide for better
regulatory decisions

Ernst & Young carried out the survey between October and November 2015 on behalf of the MCA

Fieldwork

- Interviews were carried out by telephone lasting around 12 minutes
- The survey respondents were chosen randomly from the range of GO and Melita fixed telephone numbers
- Only one person per household was interviewed and all respondents were over 18 years old

Sample

- Targeted population was stratified according to the socio-economic classification of the Maltese population
- The interviews were also distributed among Malta's six official geographic regions

Responses

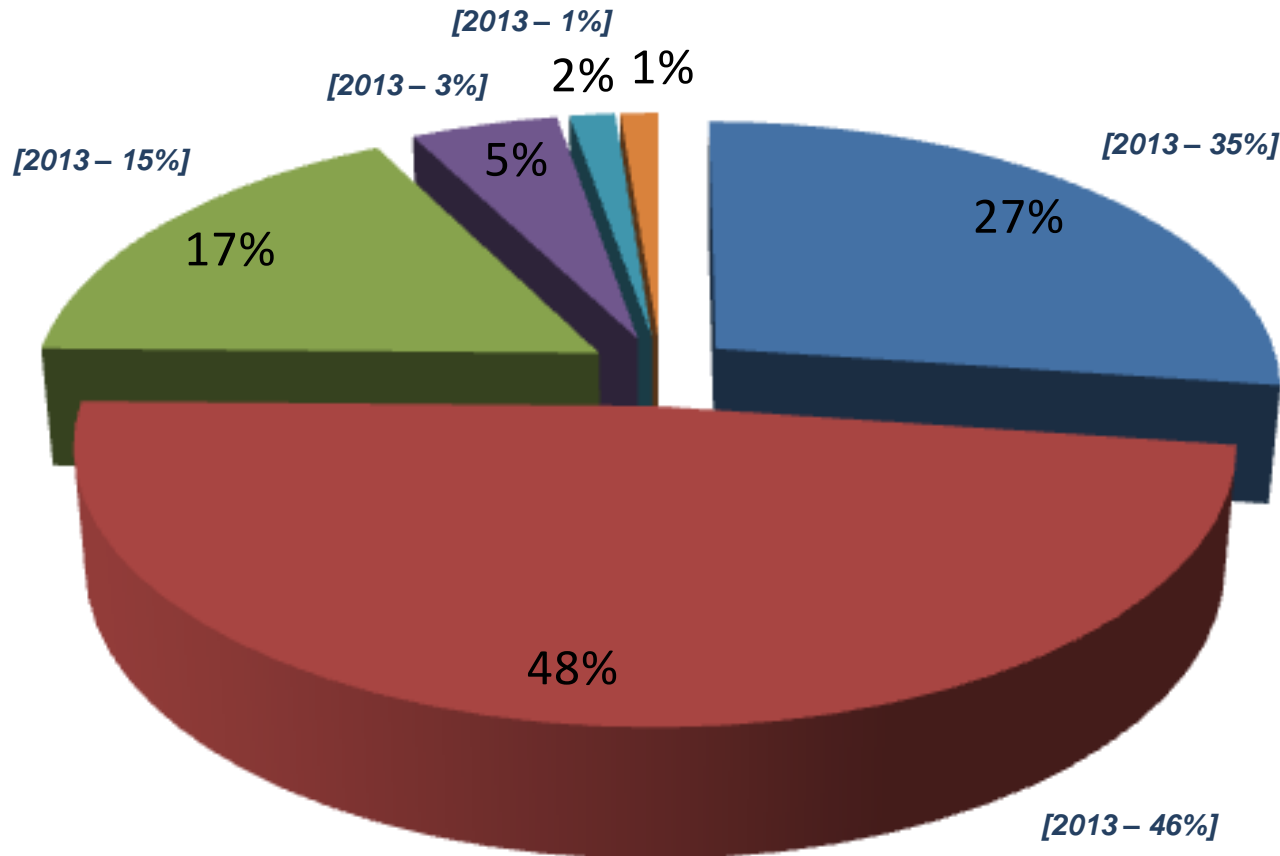
- 801 net respondents
- Any refusals / incomplete surveys were re-allocated to achieve a net sample of 800 interviewees
- Margin of error 3.45% at 95% confidence interval

2. TV Access in Maltese Households

Number of TV sets in Maltese Households

How many TV sets do you have at home?

Sample Size – 801

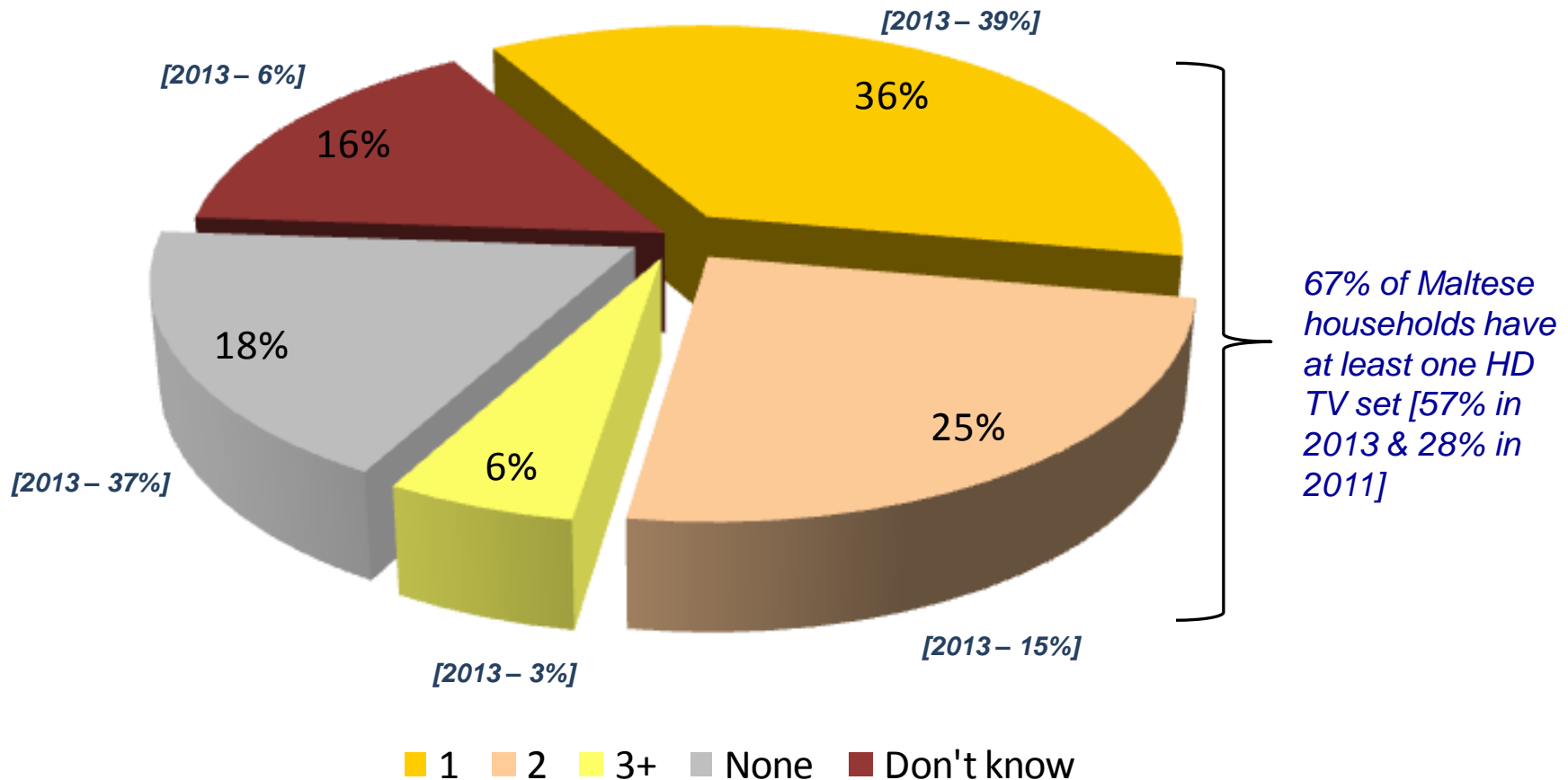


■ 1 ■ 2 ■ 3 ■ 4 ■ 5+ ■ No TV sets

Type of TV sets in Maltese Households

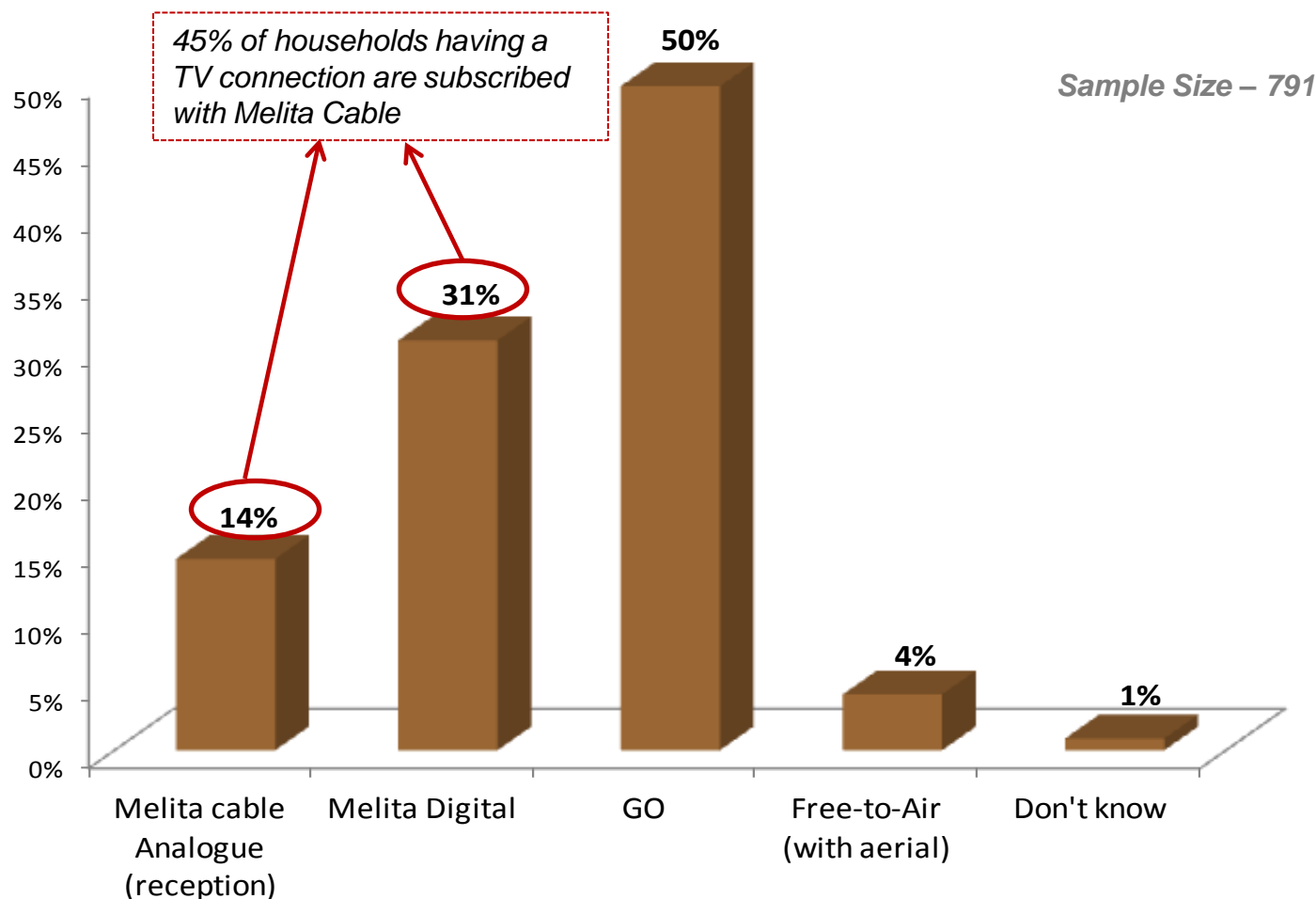
How many of these TV sets are High Definition (carries the HD logo)?

Sample Size – 791



3. Type of TV Connection

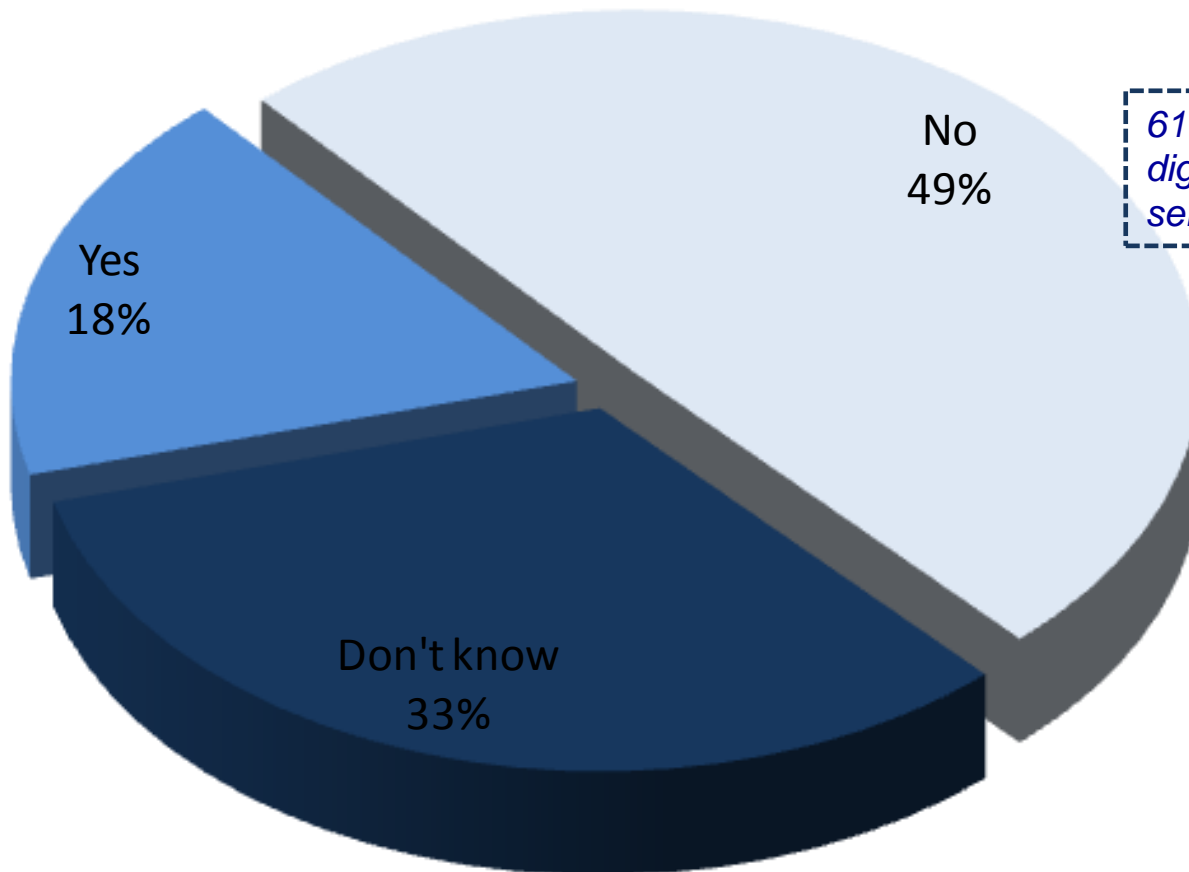
What type of TV connection do you have at home?



Disclaimer: These are the results of the survey carried out with private households and which exclude business subscriptions. These survey results do not represent the actual market share figures.

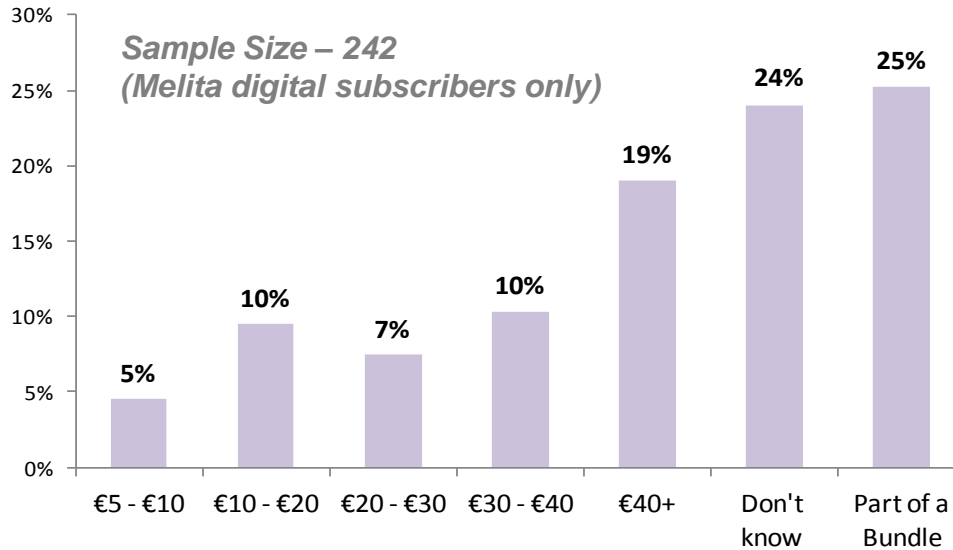
Will you switch to a digital service within the next year?

*Sample Size – 113
(Melita analogue subscribers only)*

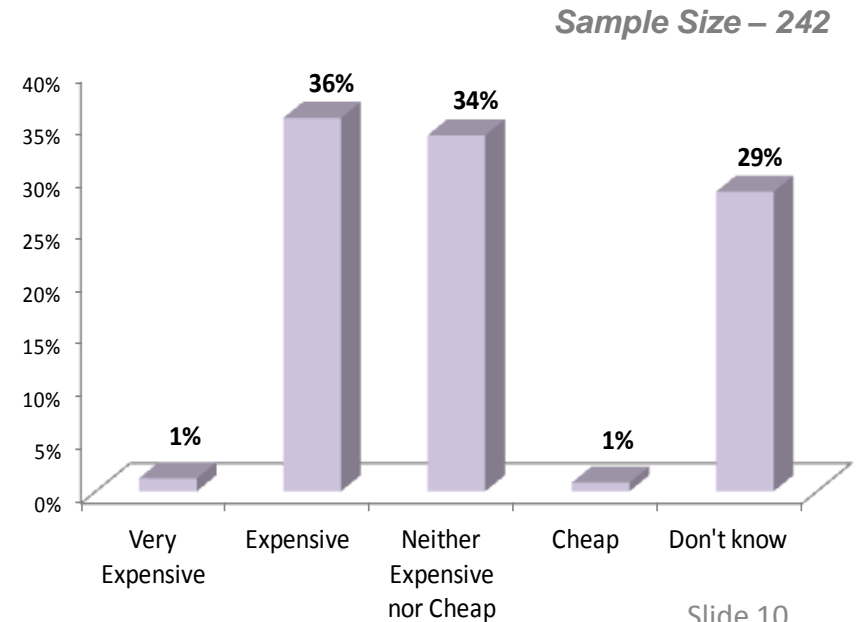


61% of those that will not switch to a digital service say that the analogue service satisfies their requirements

How much are you paying per month for digital cable?



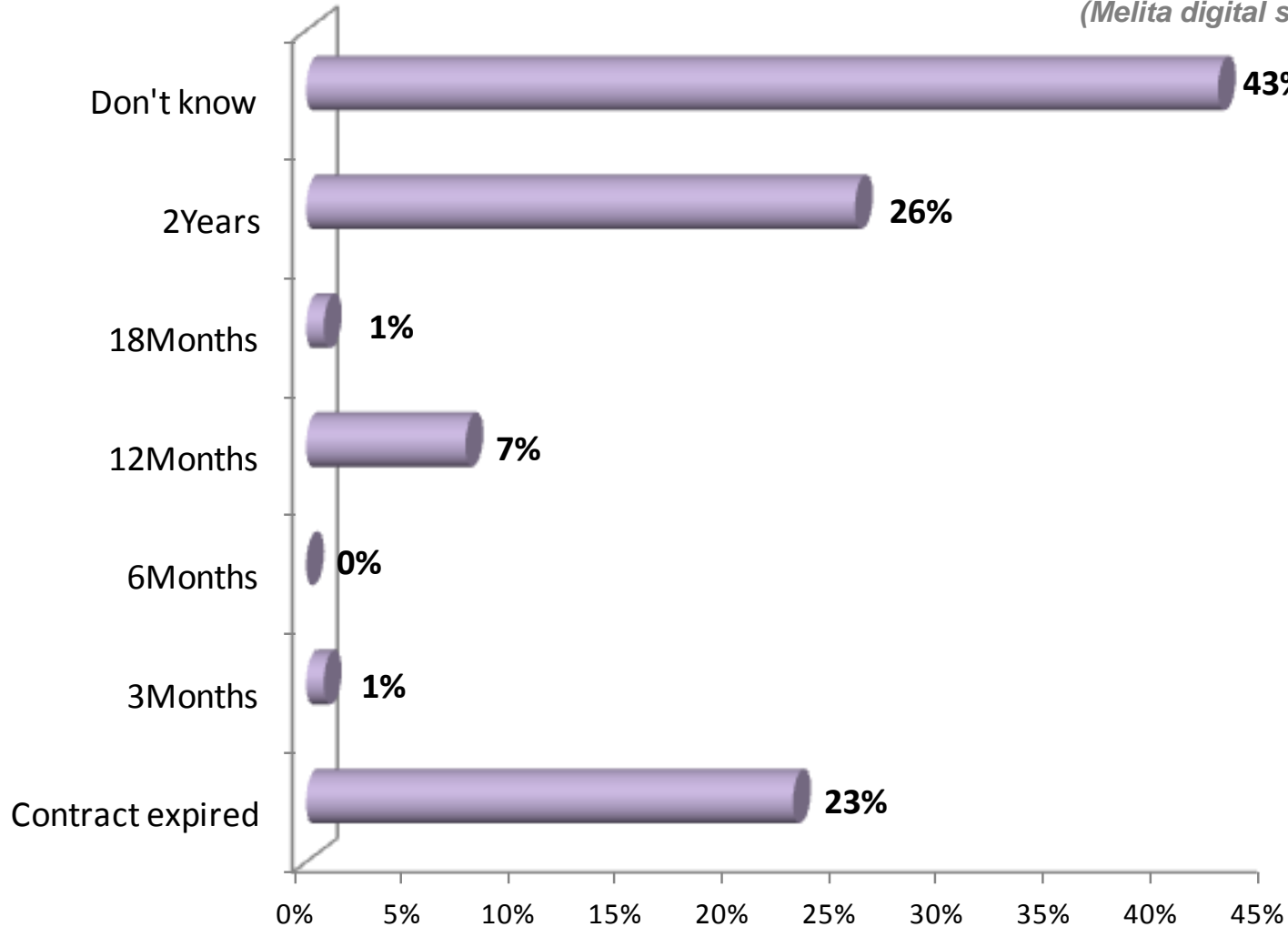
Do you consider the cost to be...



Melita Digital Service – Subscription Period

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

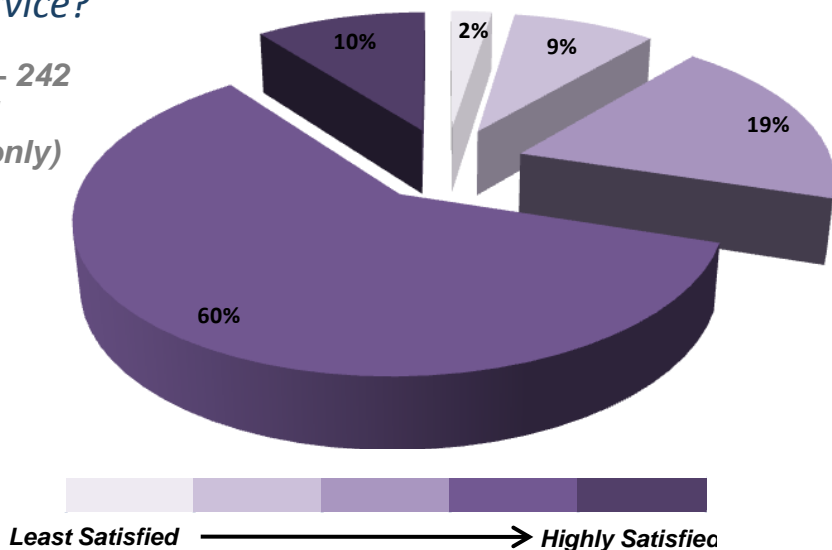
Sample Size – 242
(Melita digital subscribers only)



Melita Digital Service – Satisfaction Levels

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

Sample Size – 242
(Melita digital subscribers only)



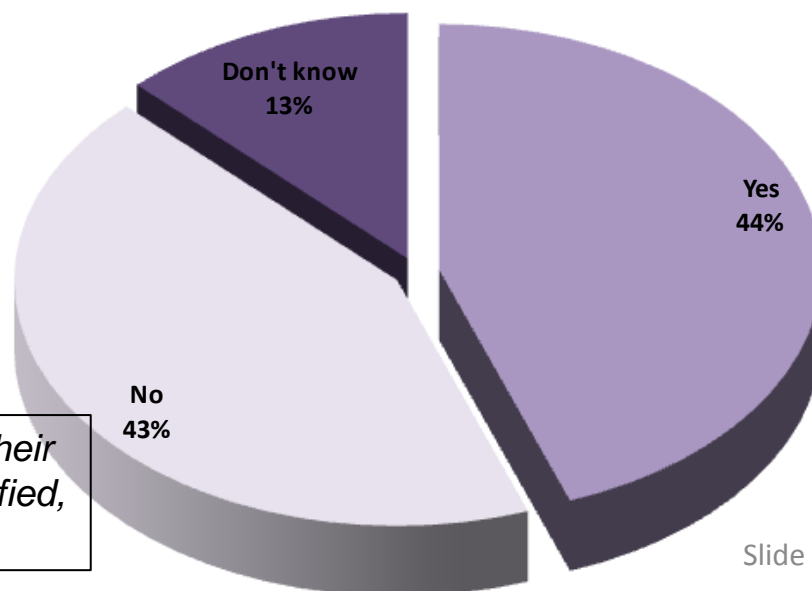
70% of Melita Digital subscribers are satisfied with the service [62% in 2013]

30% of households are not quite satisfied with the digital cable service, of which :

- 32% blame it on frequent disconnections
- 43% are not happy with the channel line up
- 22% argue customer care is bad
- 13% have billing issues

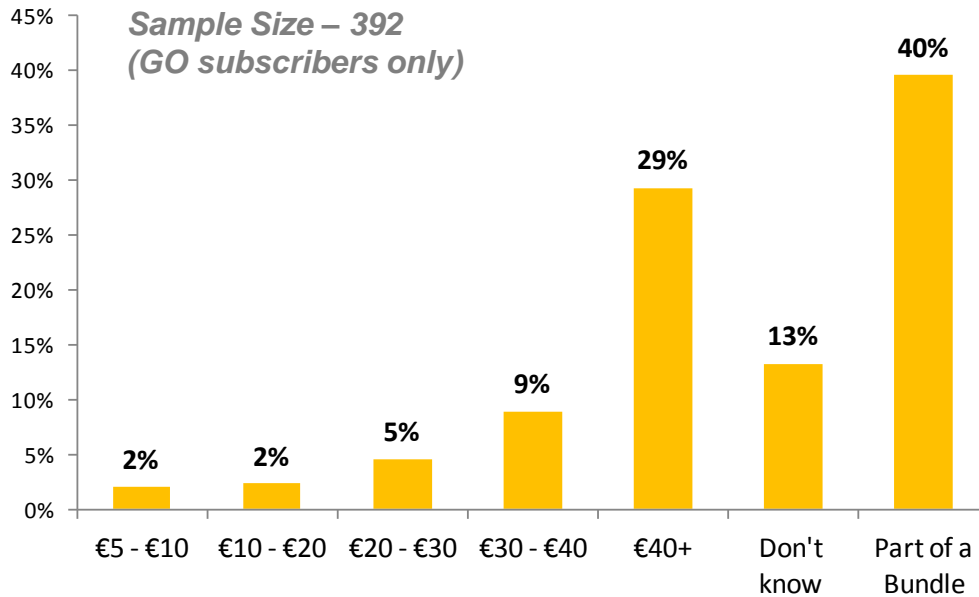
Would you consider changing your TV channel provider?

Sample Size – 72
(respondents that are not quite satisfied with the service)

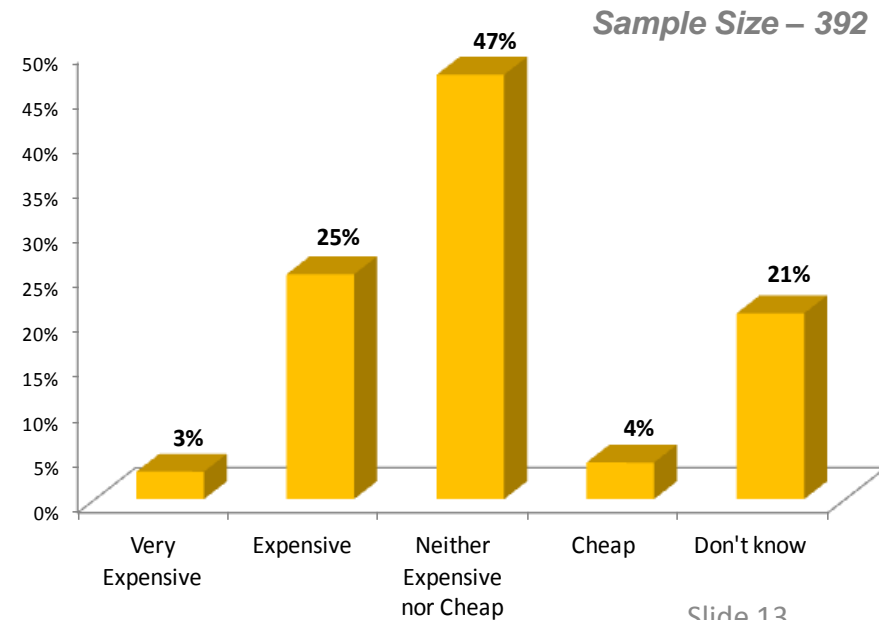


The majority of those that will not change their TV channel provider, despite being unsatisfied, perceive it to be inconvenient to switch

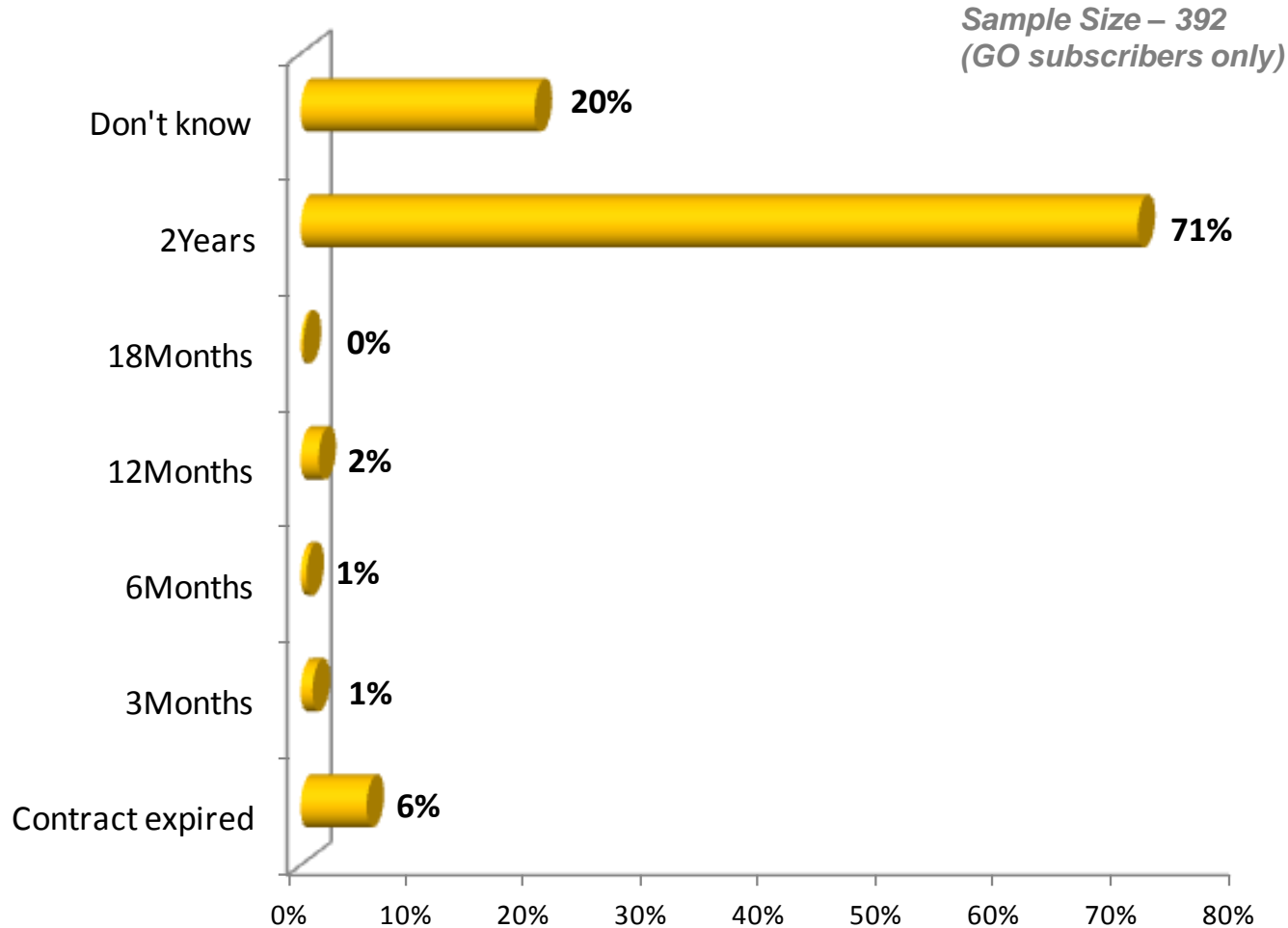
How much are you paying per month for the GO service?



Do you consider the cost to be...



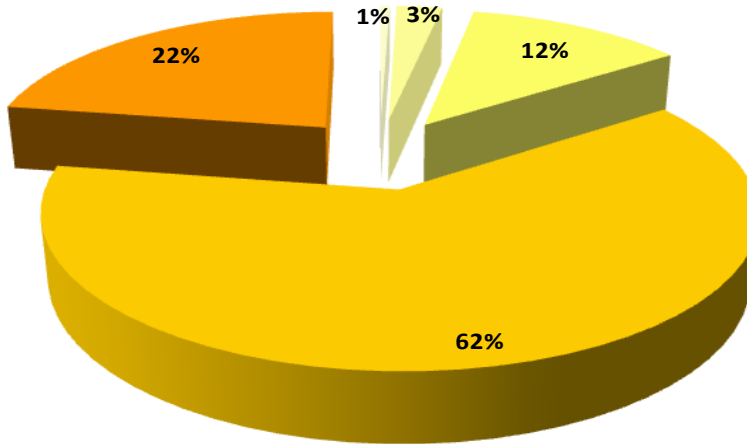
For how long does your contract bind you before being able to terminate or switch service?



GO Service – Satisfaction Levels

How satisfied are you with the quality of GO service?

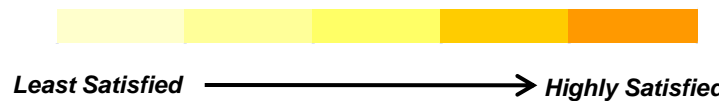
Sample Size – 392
(GO subscribers only)



84% of GO subscribers are satisfied with the service [75% in 2013]

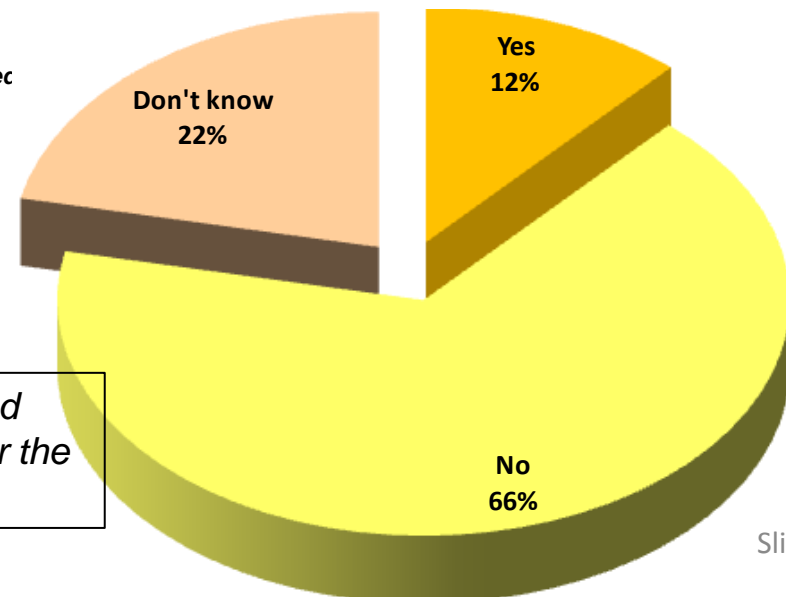
16% of households are not quite satisfied with the GO service, of which :

- 40% blame it on frequent disconnections
- 48% are not happy with the channel line up
- 17% argue customer care is bad
- 5% have billing issues



Would you consider changing your TV channel provider?

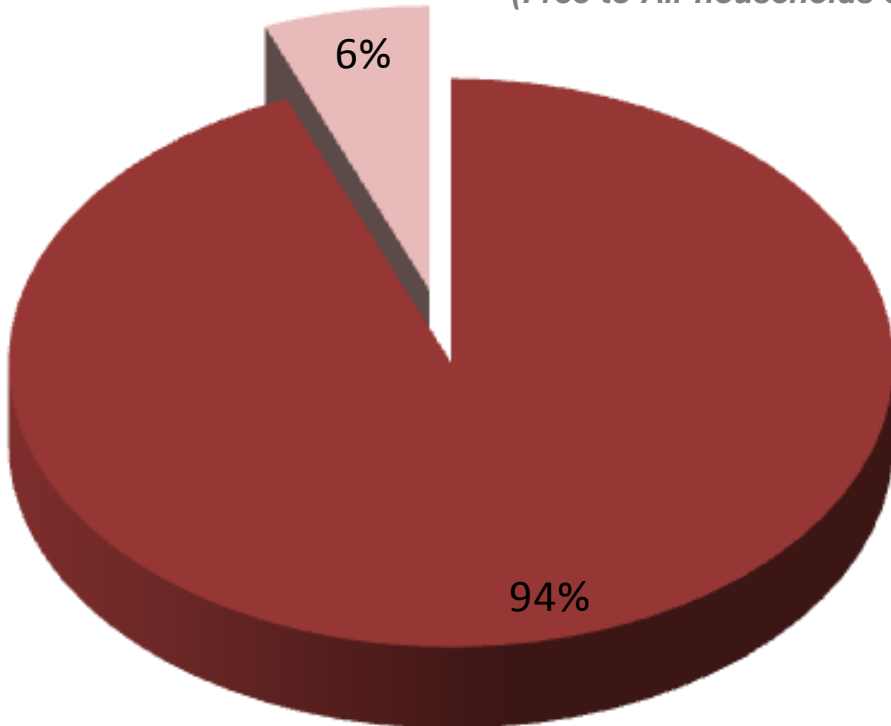
Sample Size – 60
(respondents that are not quite satisfied with the service)



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

Do you receive the Maltese TV stations?

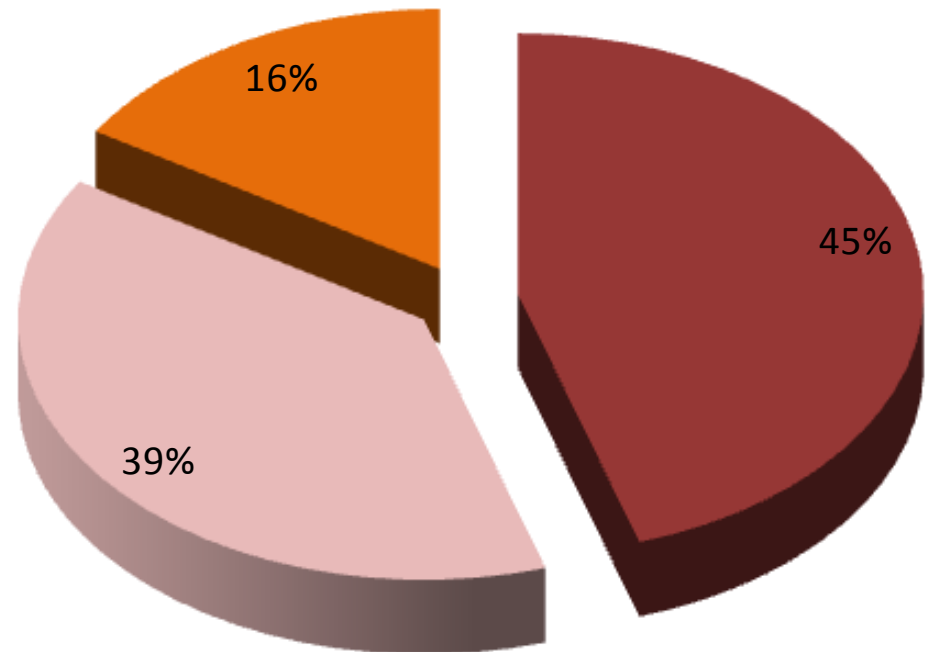
*Sample Size – 33
(Free-to-Air households only)*



■ Yes ■ No

Do you receive either of TVM or TVM2 in HD?

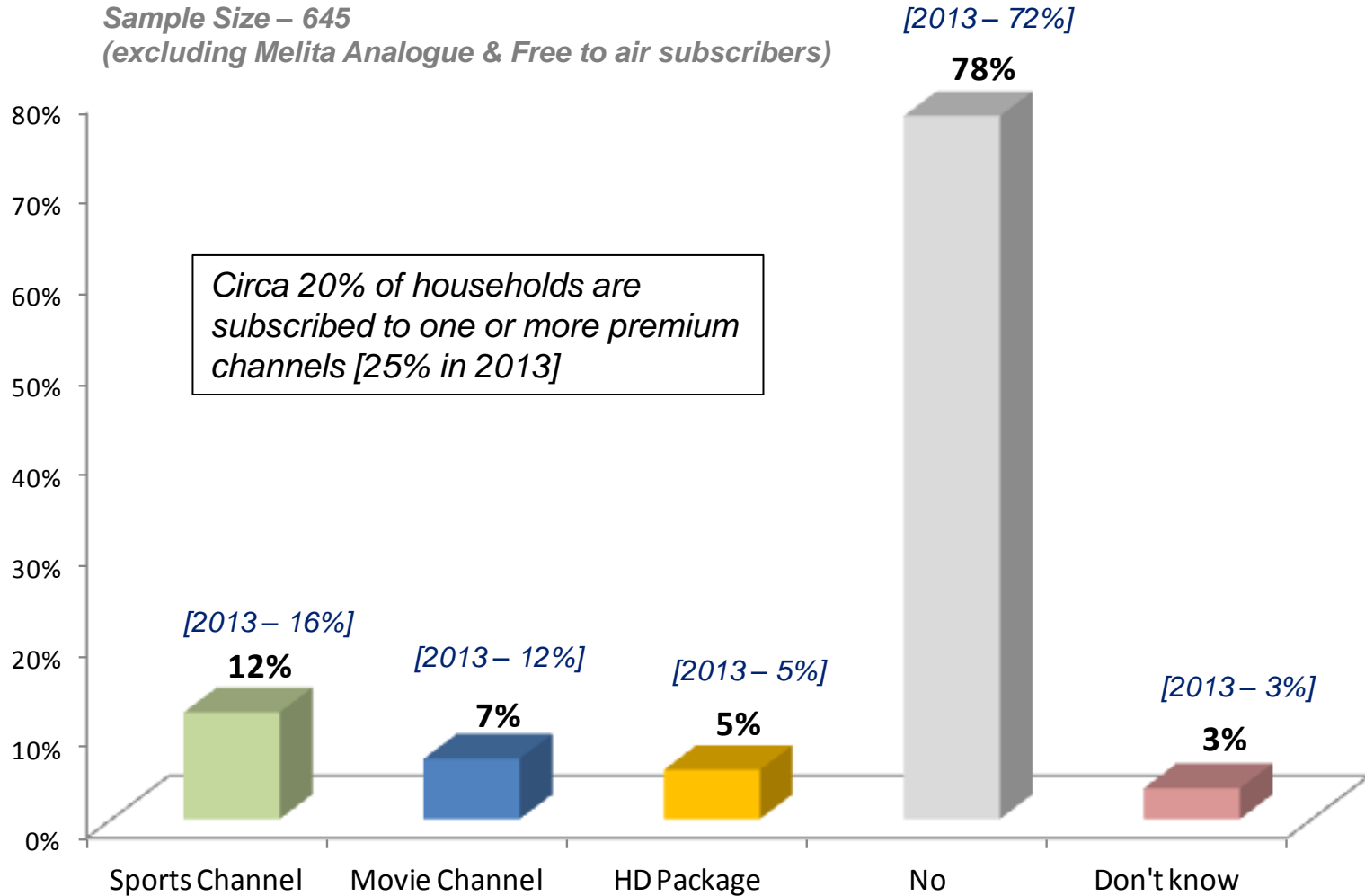
*Sample Size – 31
(Free-to-Air households that receive Maltese TV stations)*



■ Yes ■ No ■ Don't know

Are you subscribed to any premium channels?

Sample Size – 645
(excluding Melita Analogue & Free to air subscribers)

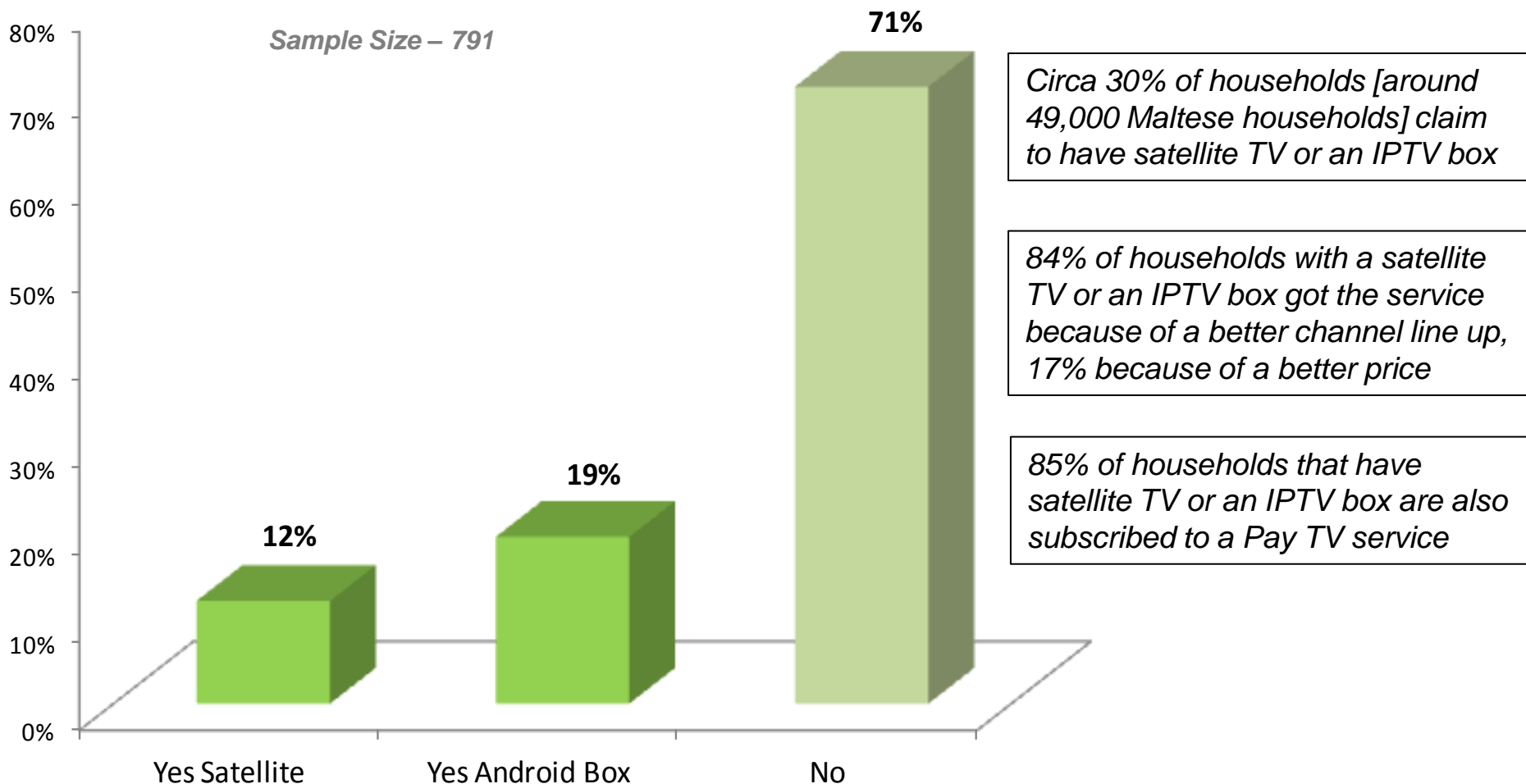




MALTA COMMUNICATIONS AUTHORITY

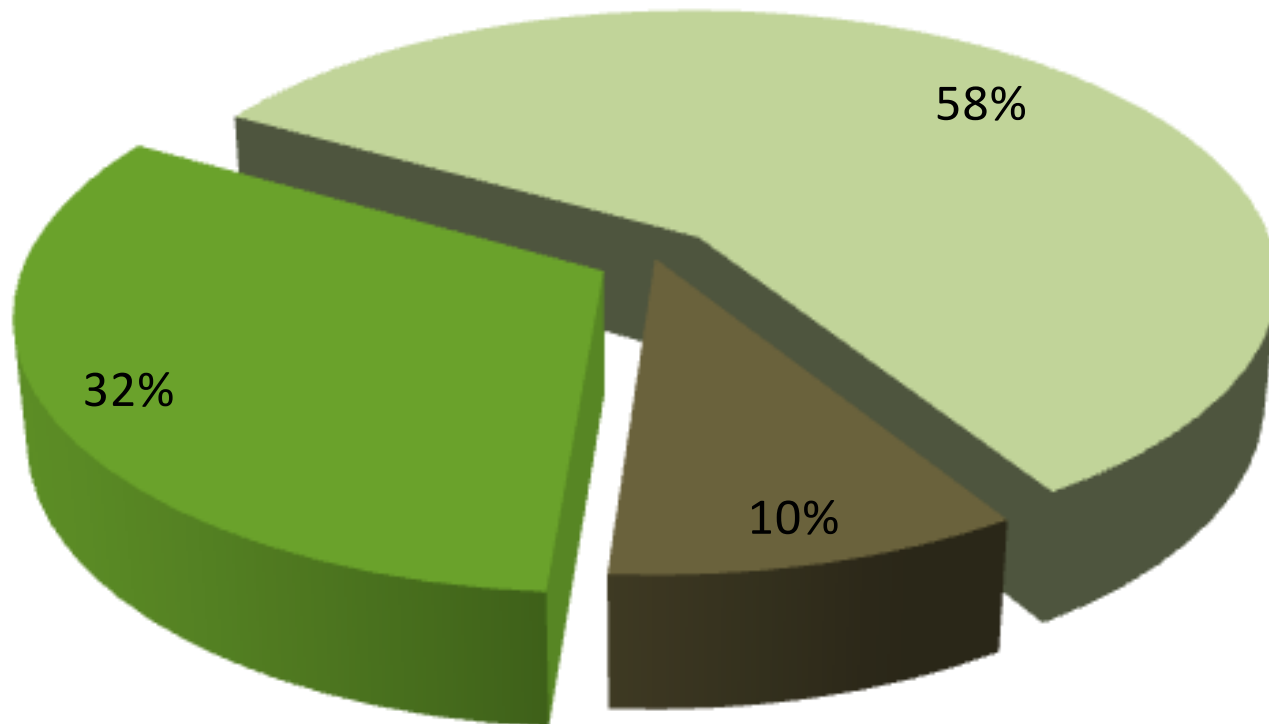
Satellite TV or IPTV Box

Do you use Satellite TV or IPTV Box (e.g. Android Box)?



Did you have to increase your Internet speed to subscribe to these services?

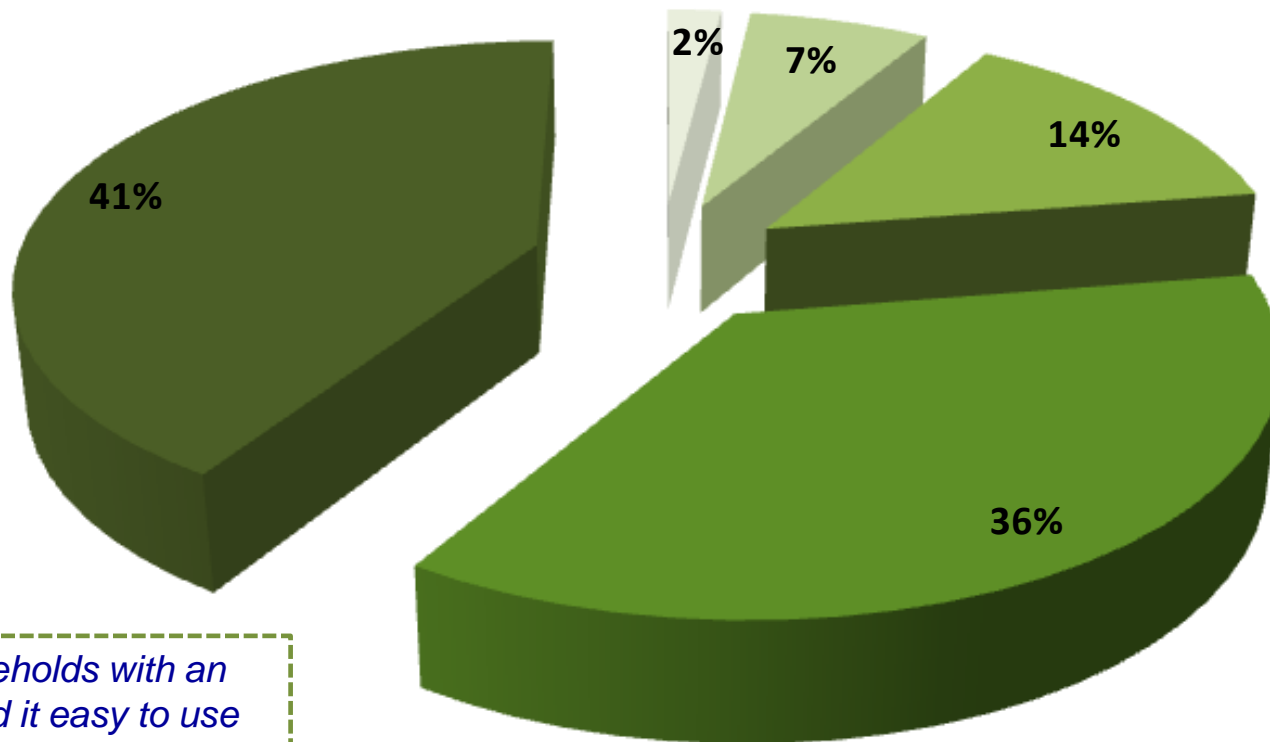
*Sample Size – 230
(households with satellite TV
or IPTV Box)*



■ Yes ■ No ■ Don't know

How easy do you find it to use the IPTV Box?

Sample Size – 151
(households with an IPTV Box)



77% of households with an IPTV Box find it easy to use

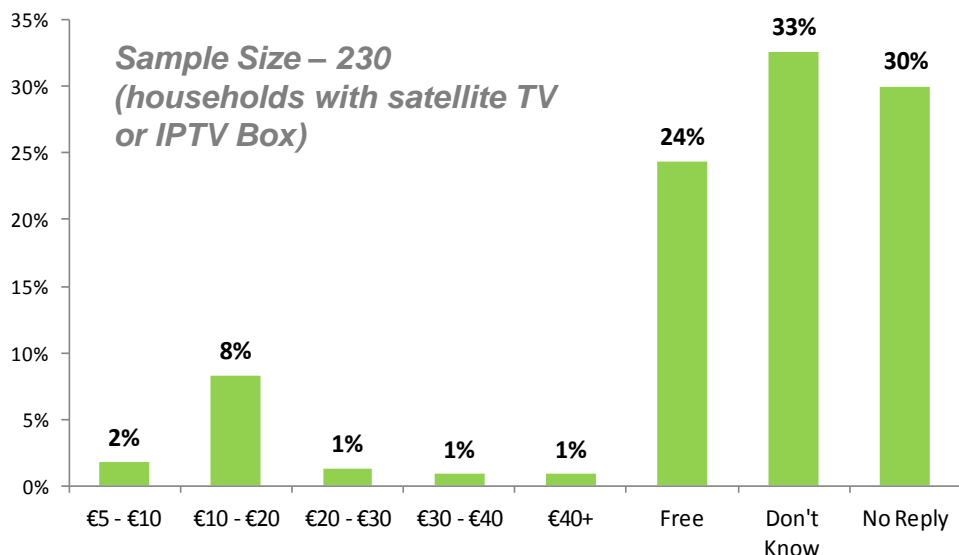




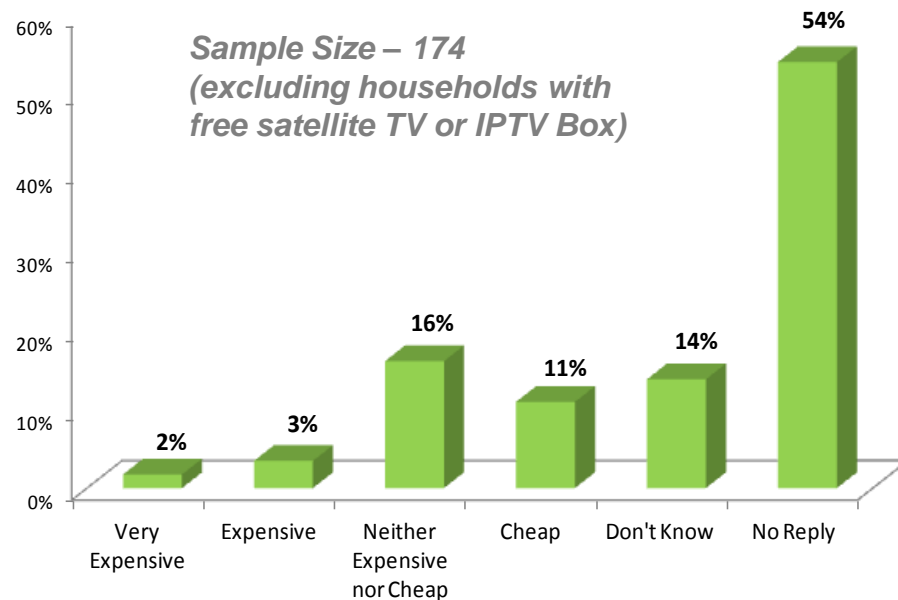
MALTA COMMUNICATIONS AUTHORITY

Satellite TV or IPTV Box – Price Analysis

Do you know how much you are paying for this service monthly?



Do you consider the cost to be...

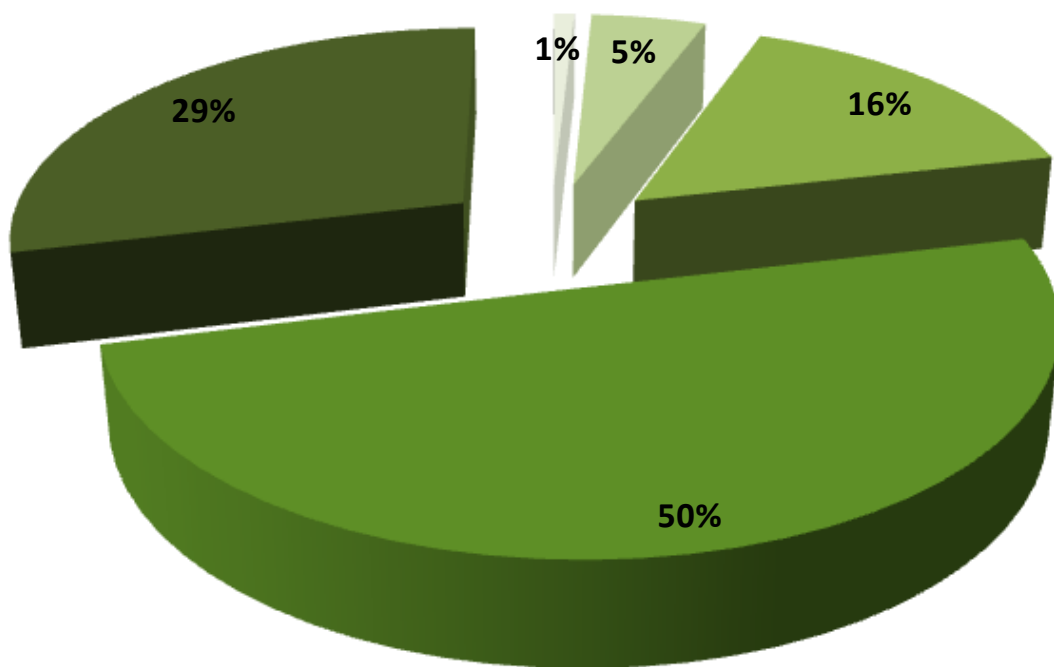


Satellite TV or IPTV Box – Satisfaction Levels

How satisfied are you with the quality of service?

Sample Size – 230

(households with satellite TV or IPTV Box)



79% of households with satellite TV or an IPTV Box are satisfied with the quality of service

22% of households are not quite satisfied with the quality of service, of which:

- *71% blame it on frequent disconnections*
- *8% are not happy with the channel line up*

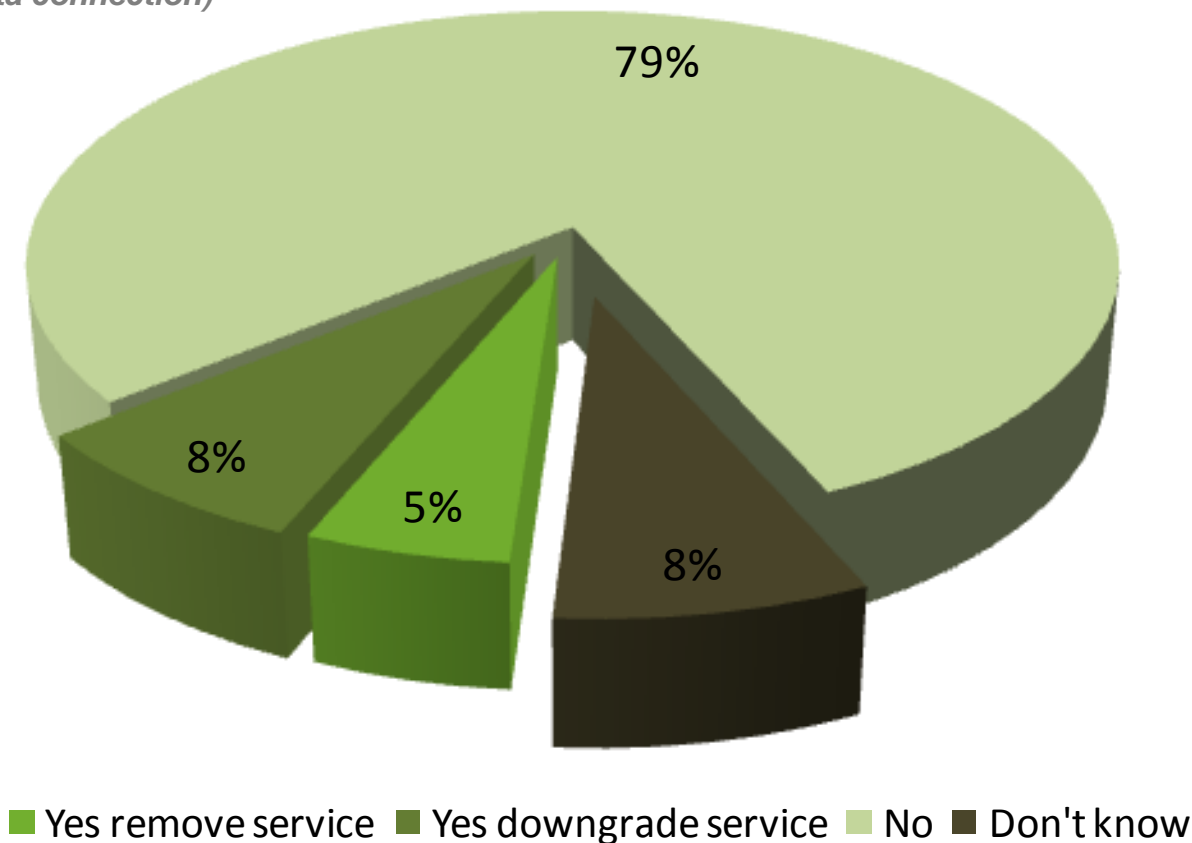


Removal of GO or Melita Connection

Will you consider removing your GO or Melita connection or downgrade the service over the next year?

*Sample Size – 193
(households with satellite TV or IPTV Box that also have a GO or Melita connection)*

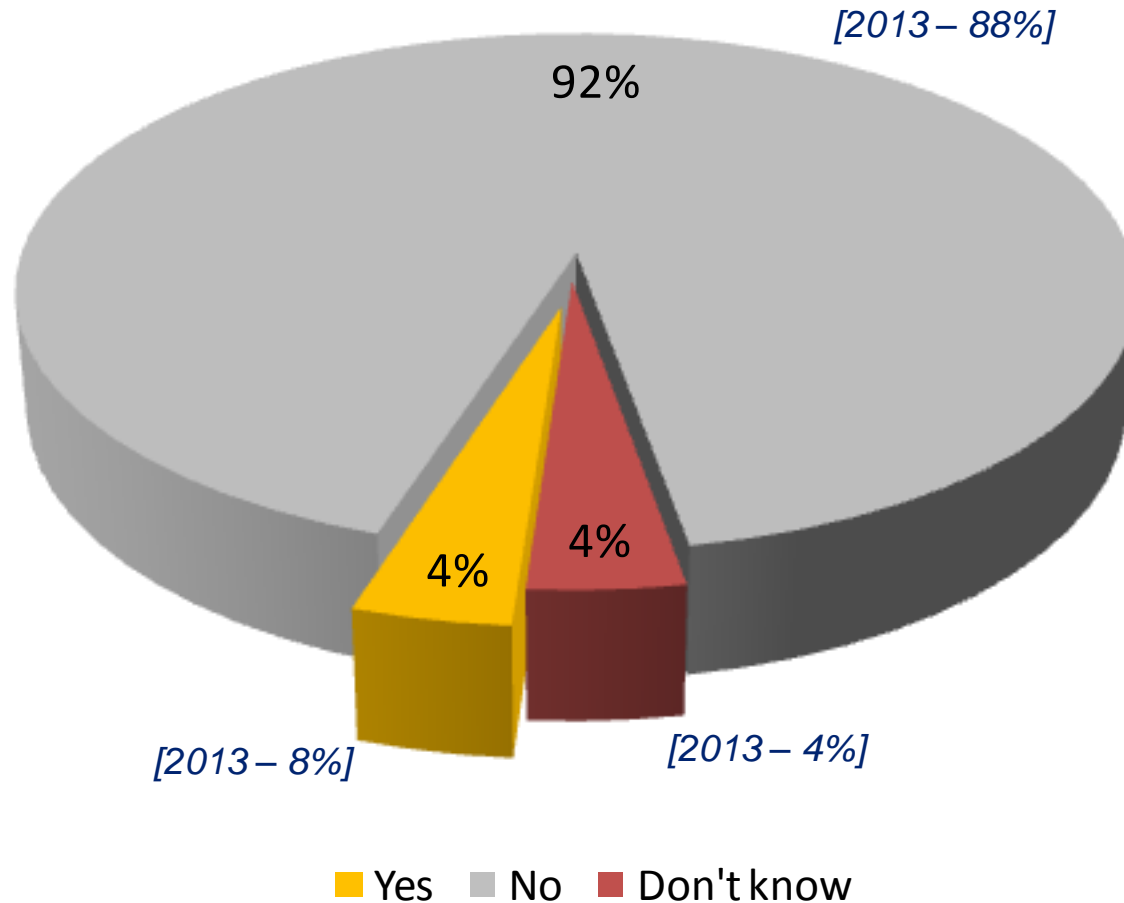
The majority of households (79%) will not remove their GO or Melita connection



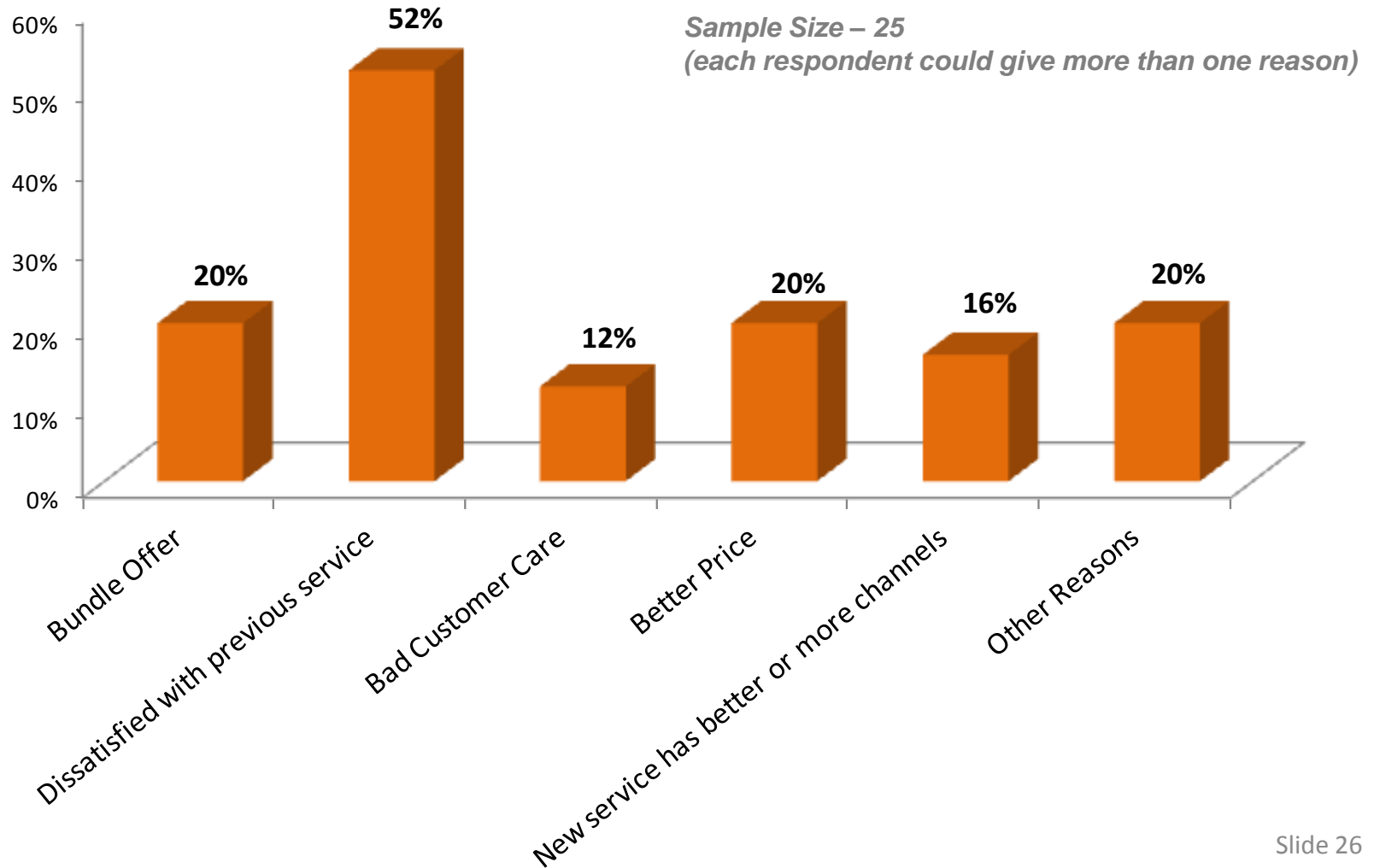
4. Market Developments

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

*Sample Size – 645
(excluding Melita Analogue & Free to air subscribers)*

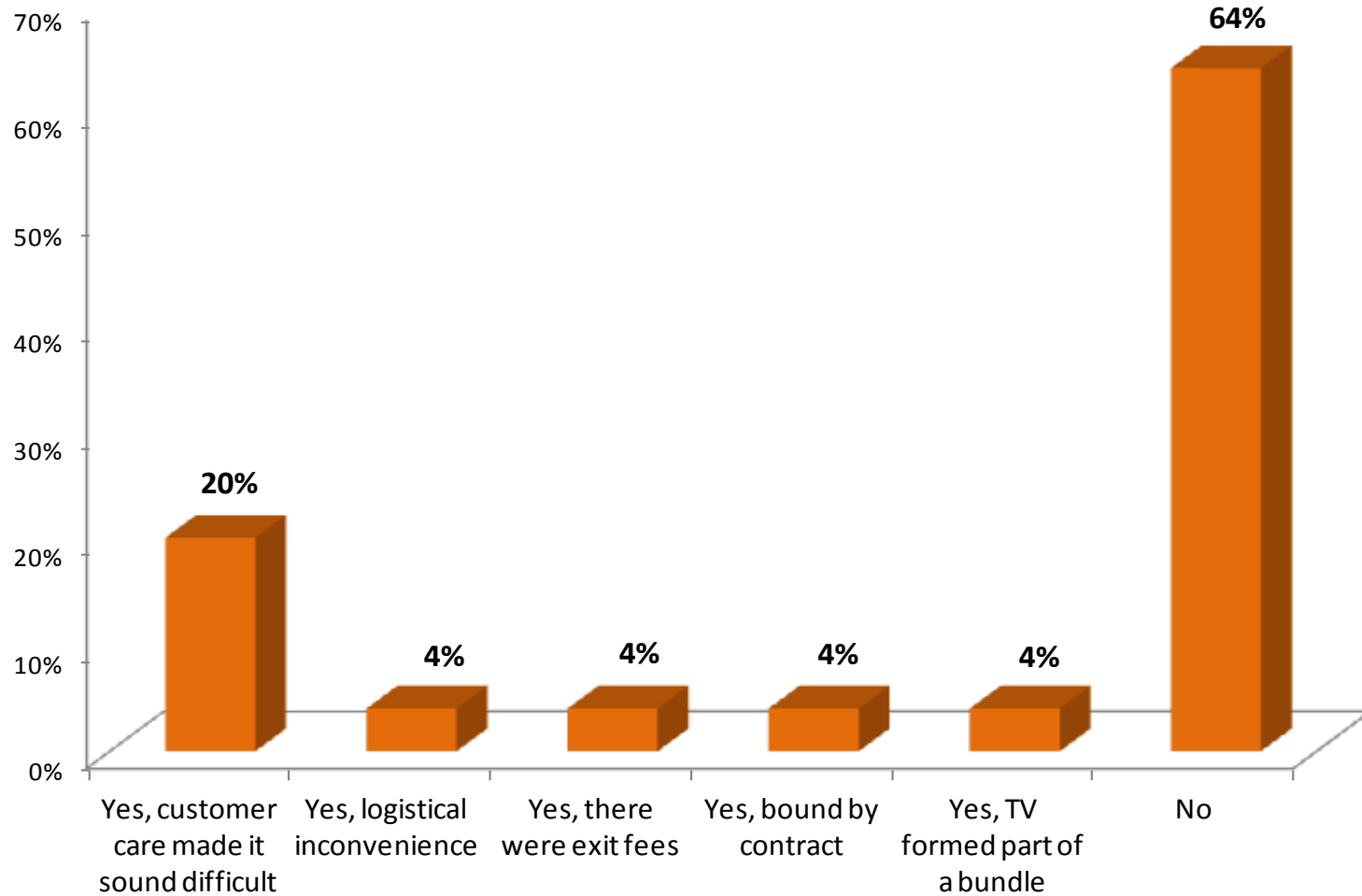


What was the reason for changing the operator?



Did you find it difficult to change the original operator?

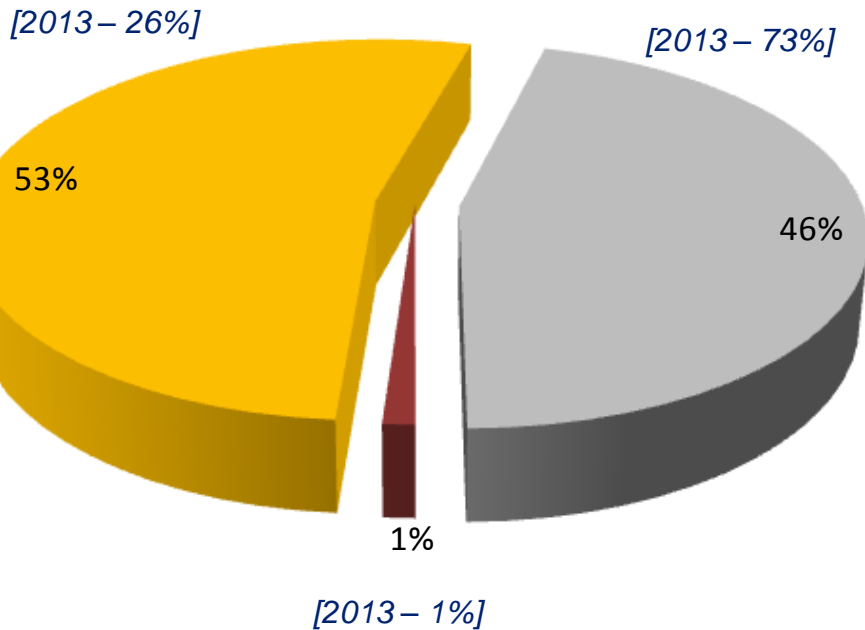
Sample Size – 25



5. Internet TV

Do you use the Internet (e.g. You Tube, Vimeo, video streaming) to watch TV?

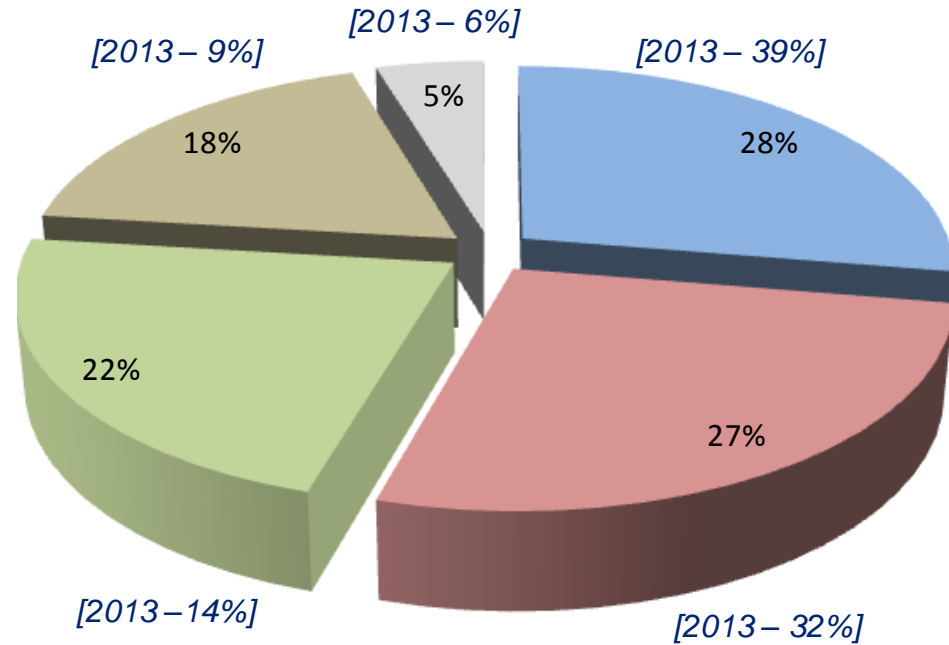
Sample Size – 801



■ Yes ■ No ■ Don't know

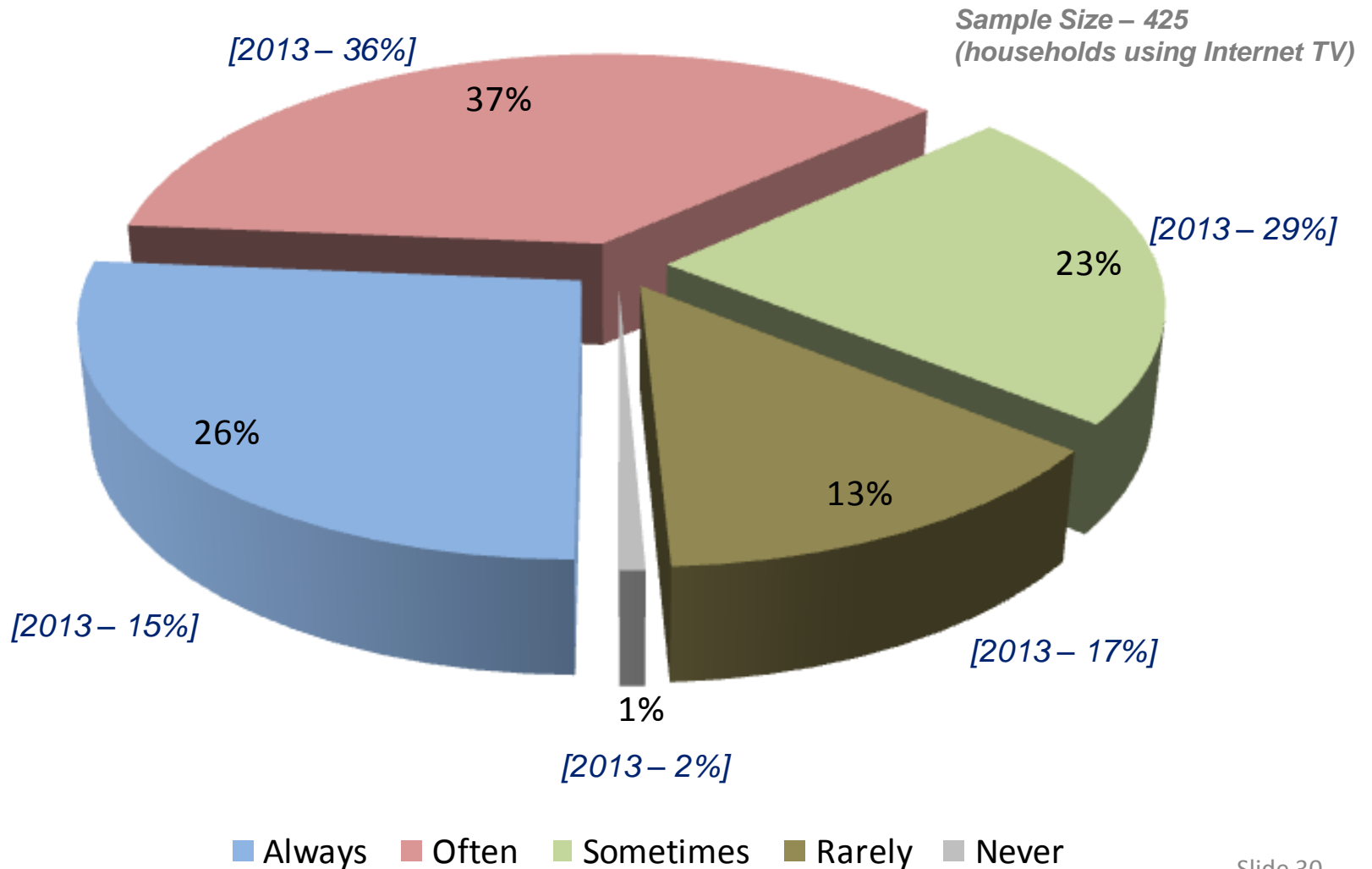
The number of members per household making use of Internet TV...

Sample Size – 425
(households using Internet TV)

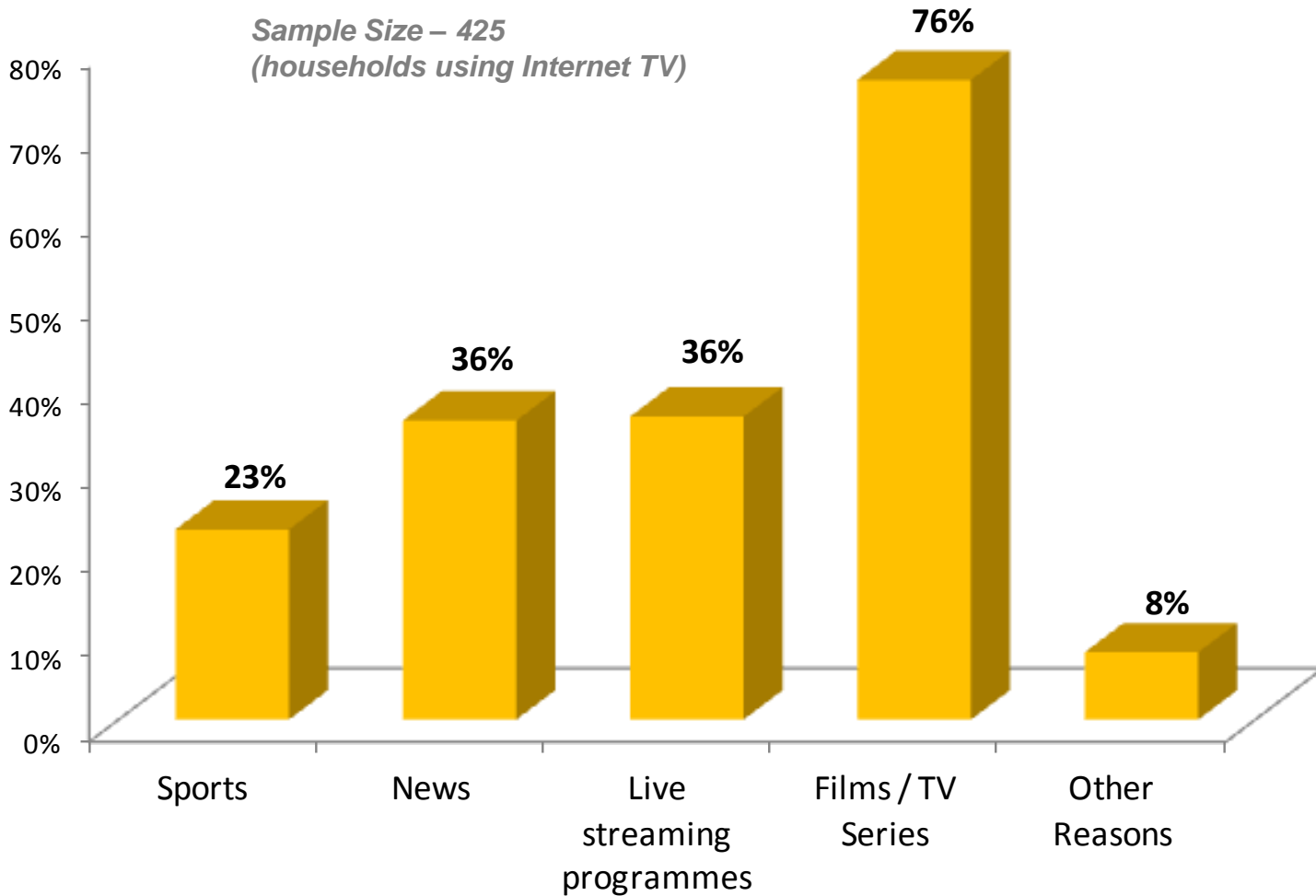


■ 1 ■ 2 ■ 3 ■ 4 ■ 5+

How much do you consider Internet TV to be a good substitute to traditional TV?



What do you watch most via Internet TV?



6. Digital Audio Broadcasting Plus

Do you have a DAB+ radio set?

Sample Size – 801

[2013 – 64%]

76%

13%

4%

7%

[2013 – 26%]

[2013 – 4%]

[2013 – 6%]

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

Where is the DAB+ radio set situated?

Sample Size – 108

57%

23%

19%

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

91% of households with a DAB+ radio set are highly satisfied with the quality of service it provides [75% in 2013]

7. Main Highlights

- 1% of Maltese households have no TV sets
- 67% of Maltese households have at least one HD TV set [57% in 2013 & 28% in 2011]
- 4% of Maltese households receive a free-to-air broadcasting service
- 70% of Melita Digital subscribers are satisfied with the service provided [62% in 2013]
- 84% of GO subscribers are satisfied with the service [75% in 2013]
- Circa 20% of households are subscribed to one or more premium channels [25% in 2013]
- Circa 30% of households [around 49,000 Maltese households] claim to have satellite TV or an IPTV box
- 84% of households with a satellite TV or an IPTV box got the service because of a better channel line up, 17% because of a better price
- 85% of households that have satellite TV or an IPTV box are also subscribed to a Pay TV service

- 22% of households with a satellite TV or an IPTV box are not quite satisfied with the quality of service, of which 71% blame it on frequent disconnections
- Only 8% of households with a satellite TV or an IPTV box will remove their GO or Melita connection
- 4% of households claim to have changed their TV operator over the last two years [8% in 2013]
- The number of households using the Internet to watch TV grew from 26% in 2013 to 53% in 2015
- More households consider Internet TV to be a good substitute to traditional TV: Always – 26% [15% in 2013]
- 13% claim to have a DAB+ radio set [6% in 2013]



MALTA COMMUNICATIONS AUTHORITY

Thank you

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