



**MCA Market Research**  
***Consumer Perception Survey Results – Broadcast***

MCA | *January 2014*

# 1. Purpose & Methodology

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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 August and October 2013 on behalf of the MCA*

## Fieldwork

- Interviews were carried out by telephone lasting around 6 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

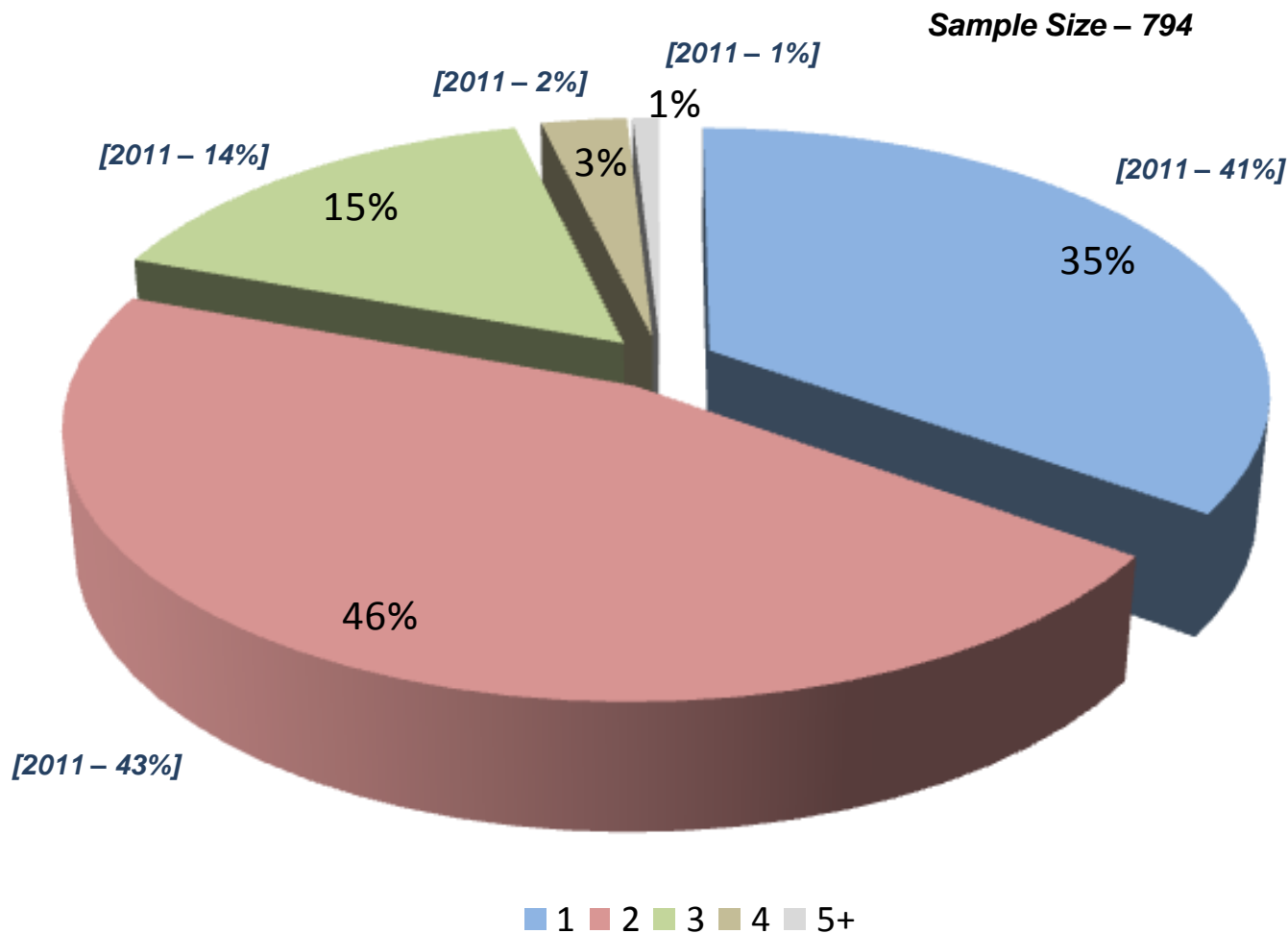
## Responses

- 794 net respondents
- Any refusals / incomplete surveys were re-allocated to achieve a net sample of 794 interviewees
- Margin of error 3.45% at 95% confidence interval

## 2. TV Access in Maltese Households

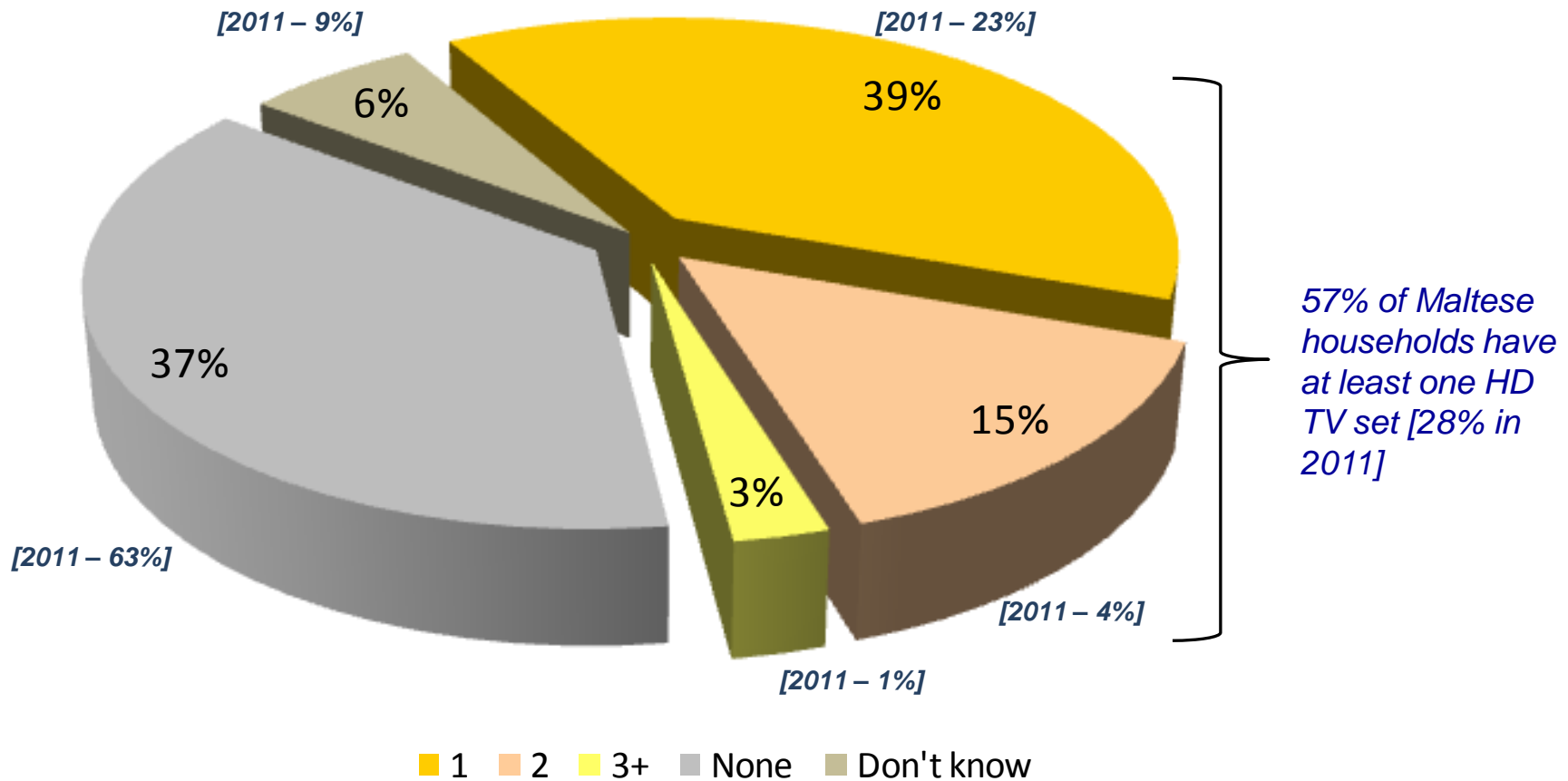
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*How many TV sets do you have at home?*



## How many of these TV sets are High Definition?

Sample Size – 794

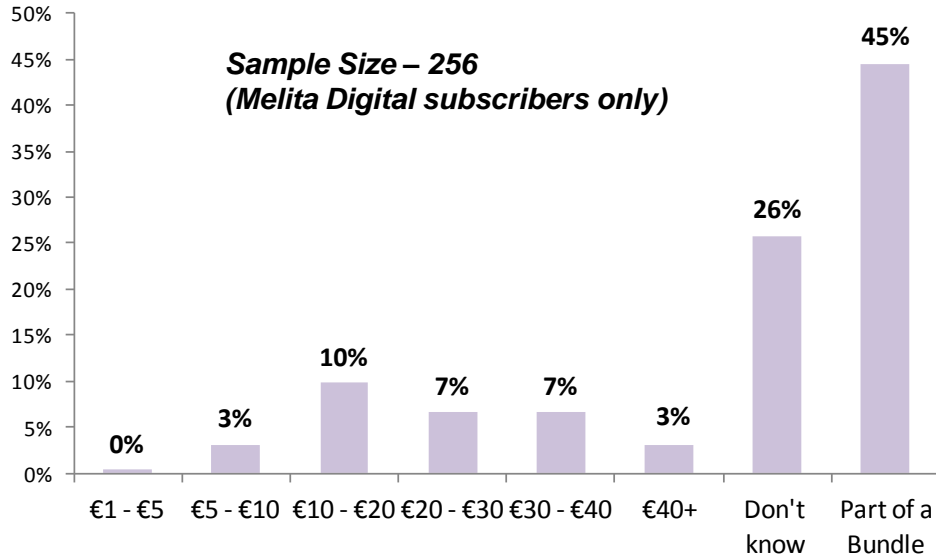


## 3. Type of TV Connection

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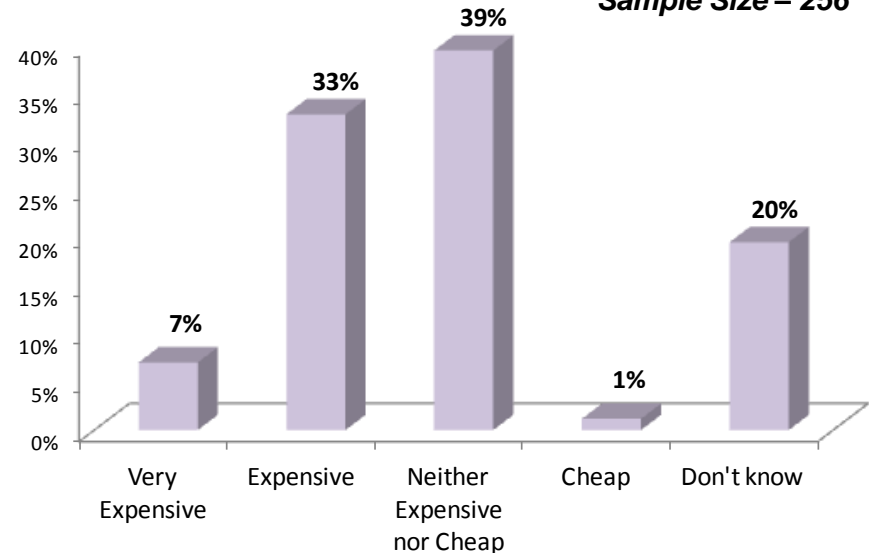
## How much are you paying per month for digital cable?

**Sample Size – 256**  
**(Melita Digital subscribers only)**



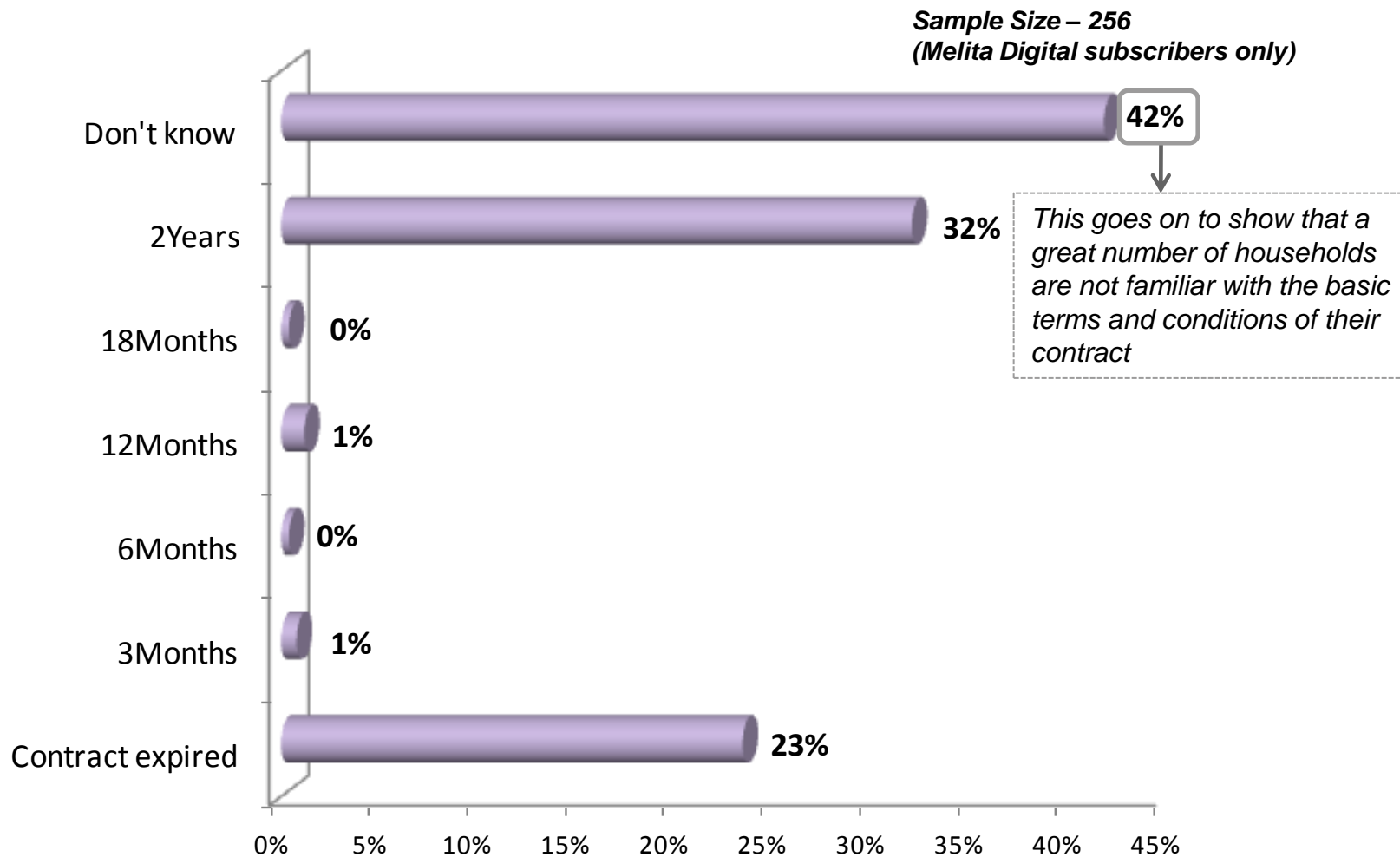
## Do you consider the cost to be...

**Sample Size – 256**



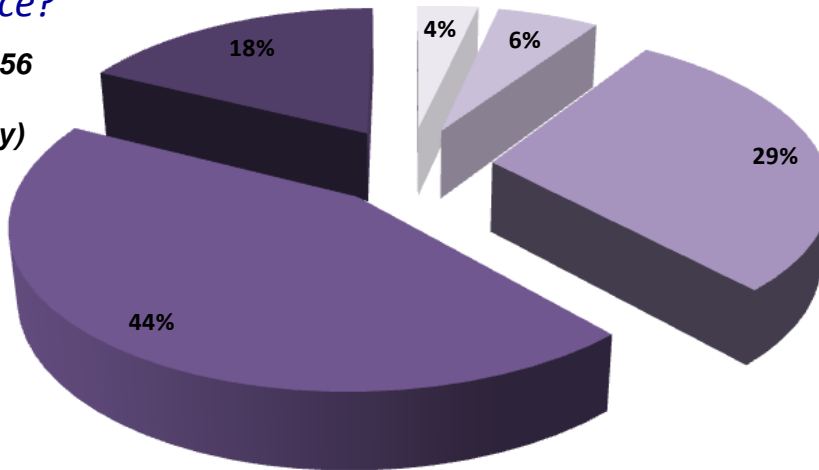


*For how long does your contract bind you before being able to terminate or switch service?*



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

**Sample Size – 256  
(Melita Digital subscribers only)**



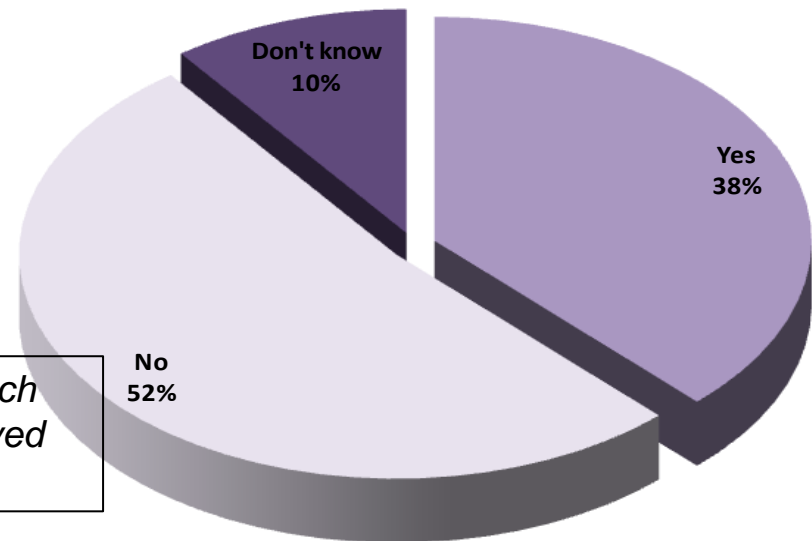
62% of Melita Digital subscribers are satisfied with the service [70% in 2011]

- 38% of households are not quite satisfied with the digital cable service, of which :
- 26% blame it on frequent disconnections
  - 57% are not happy with the channel line up
  - 9% argue customer care is bad
  - 21% have billing issues

## Would you consider changing your TV channel provider?

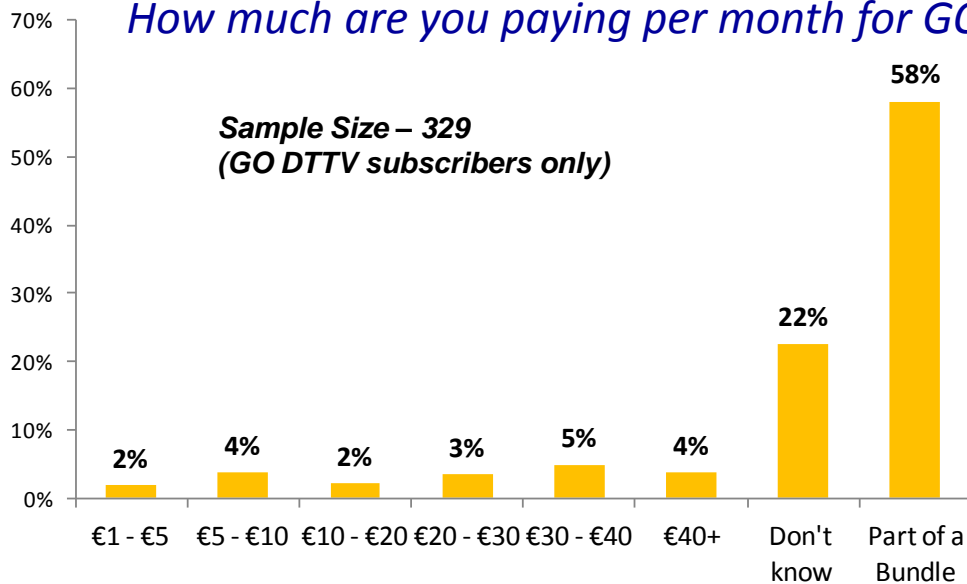
**Sample Size – 98  
(respondents that are not quite satisfied with the service)**

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



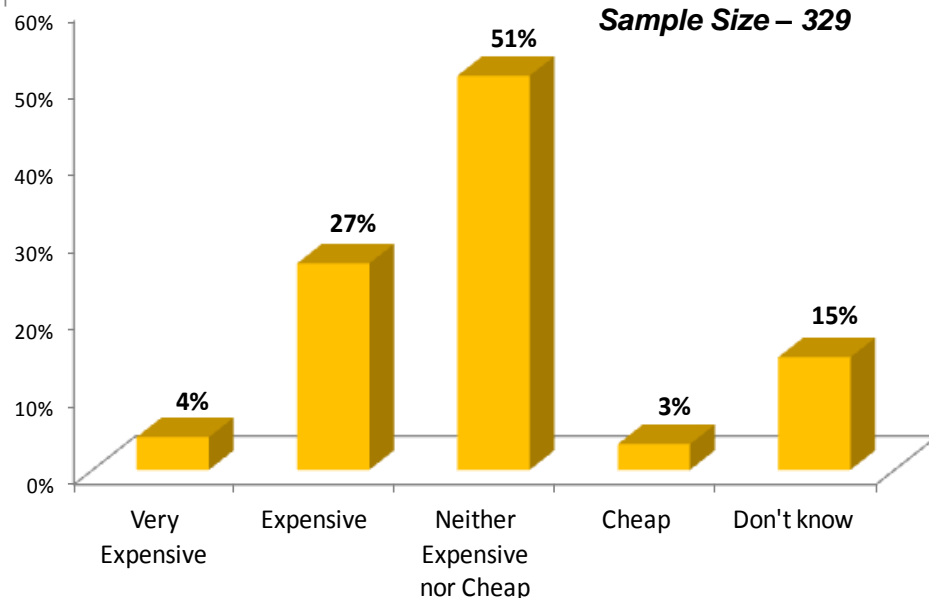
## How much are you paying per month for GO DTTV?

**Sample Size – 329**  
**(GO DTTV subscribers only)**

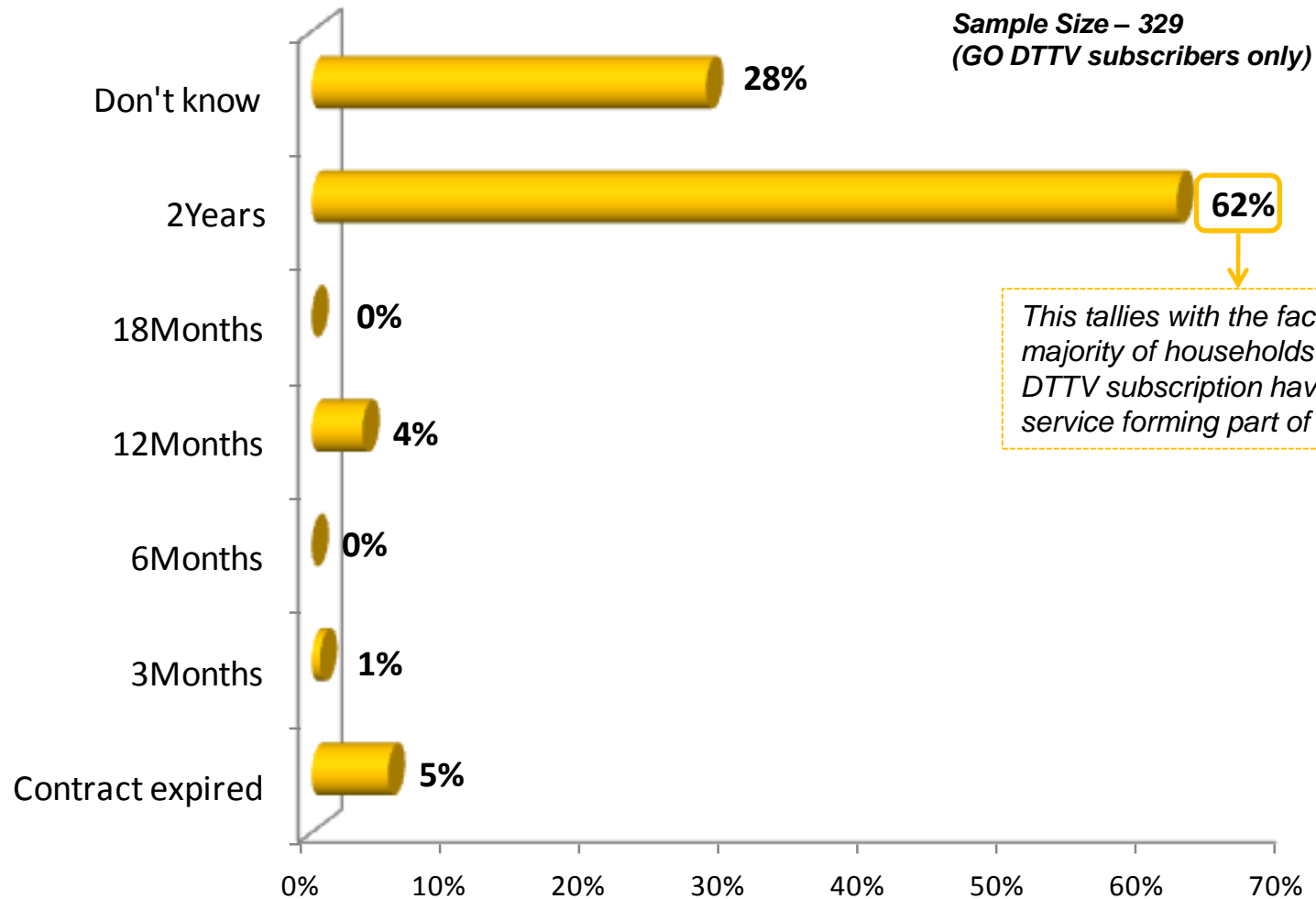


## Do you consider the cost to be...

**Sample Size – 329**

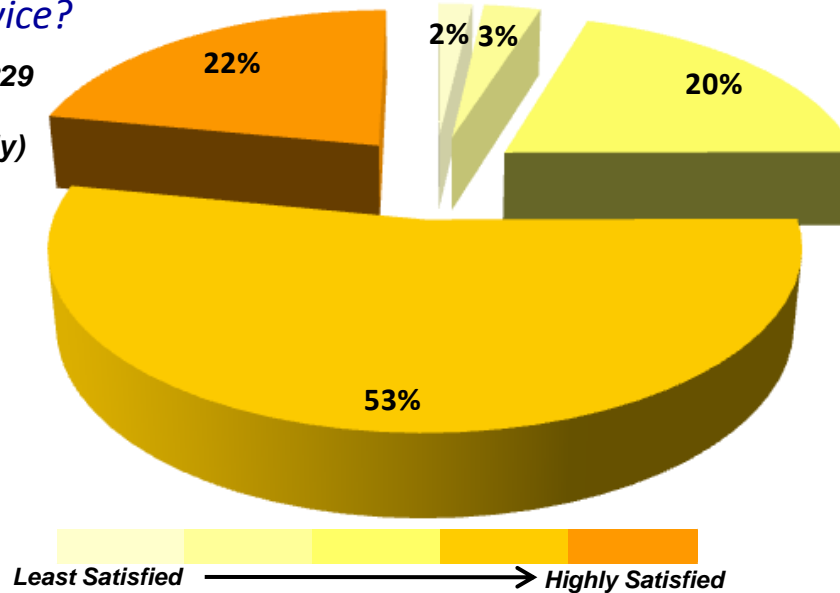


*For how long does your contract bind you before being able to terminate or switch service?*



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

Sample Size – 329  
(GO DTTV subscribers only)



75% of GO DTTV subscribers are satisfied with the service [78% in 2011]

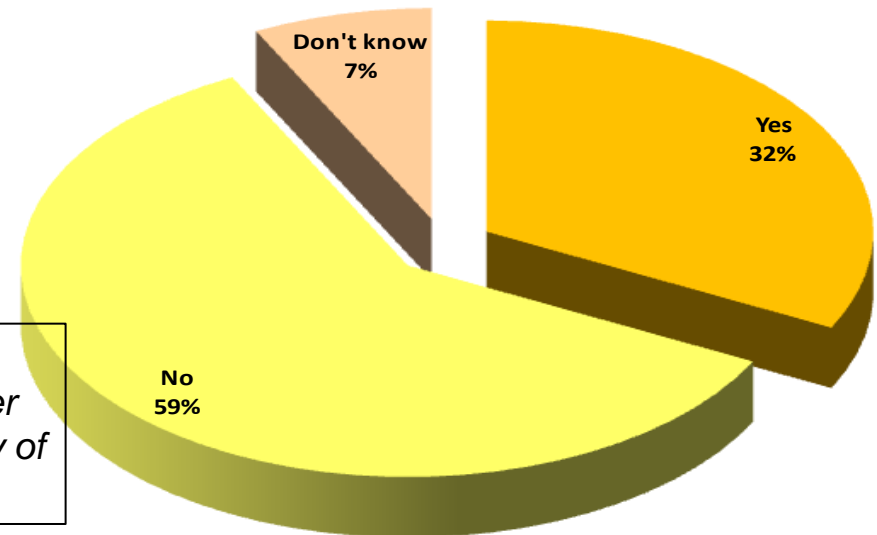
25% of households are not quite satisfied with the GO service, of which :

- 30% blame it on frequent disconnections
- 45% are not happy with the channel line up
- 10% argue customer care is bad
- 9% have billing issues

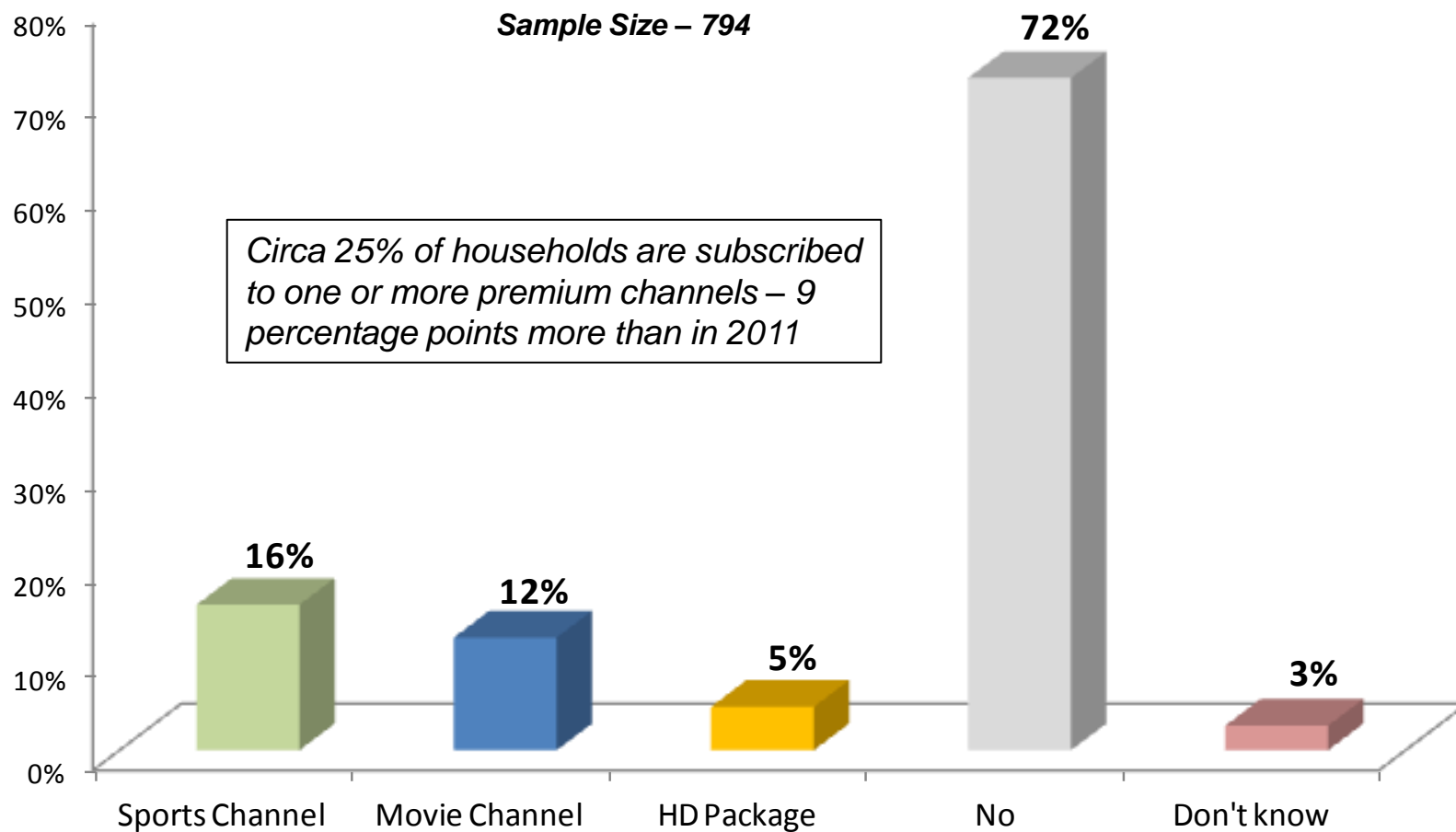
Would you consider changing your TV channel provider?

Sample Size – 82  
(respondents that are not quite satisfied with the service)

Mainly because it is inconvenient to switch, TV service forms part of a bundle and because other providers are perceived to offer the same quality of service.



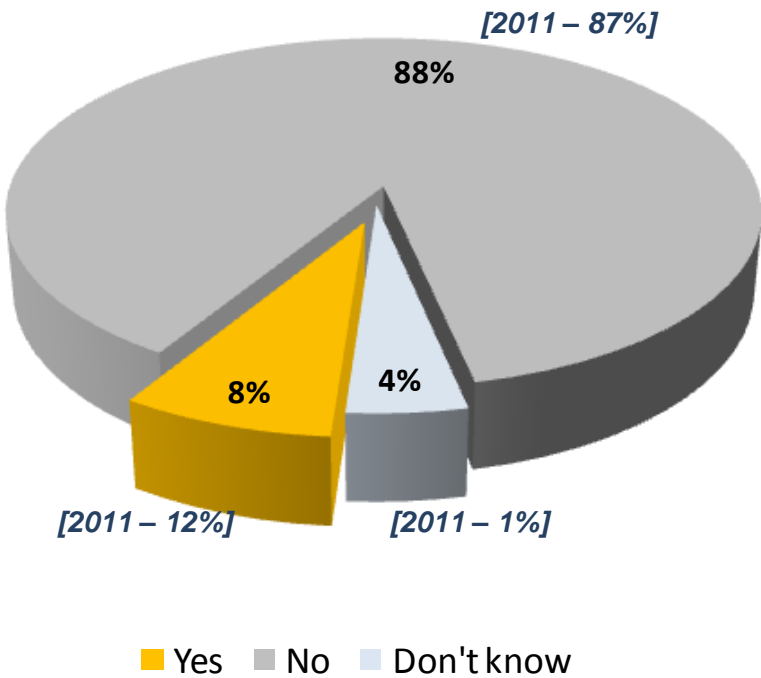
*Are you subscribed to any premium channels?*



# Movements in the type of TV connection (1)

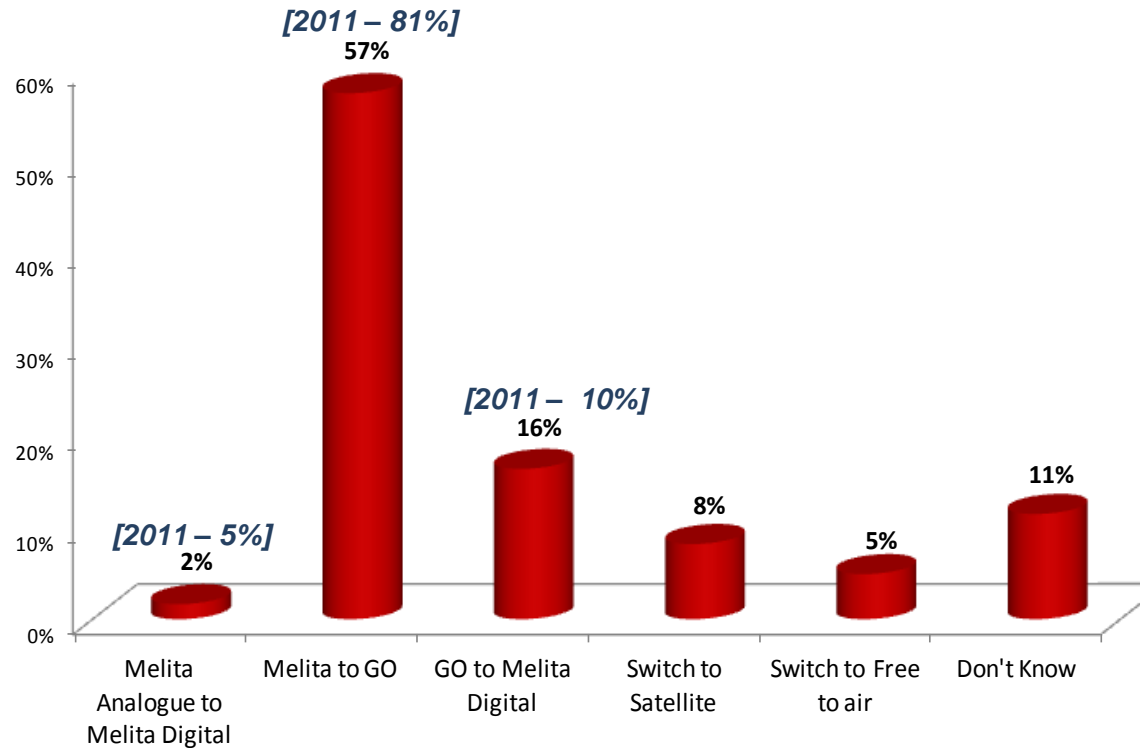
*Did you switch from one type of TV connection to another over the last two years?*

**Sample Size – 794**



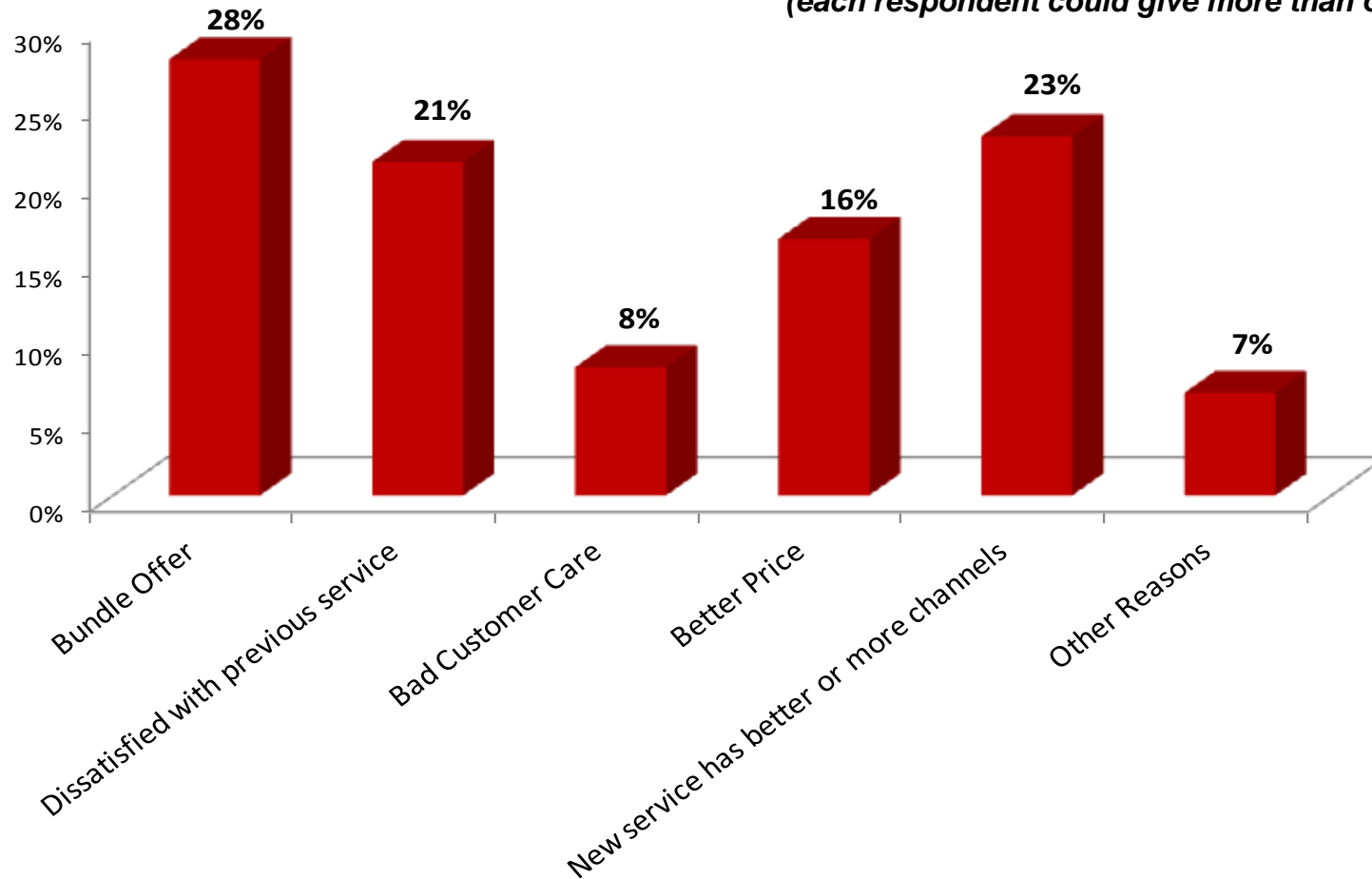
*If yes, what was your previous connection?*

**Sample Size – 61**



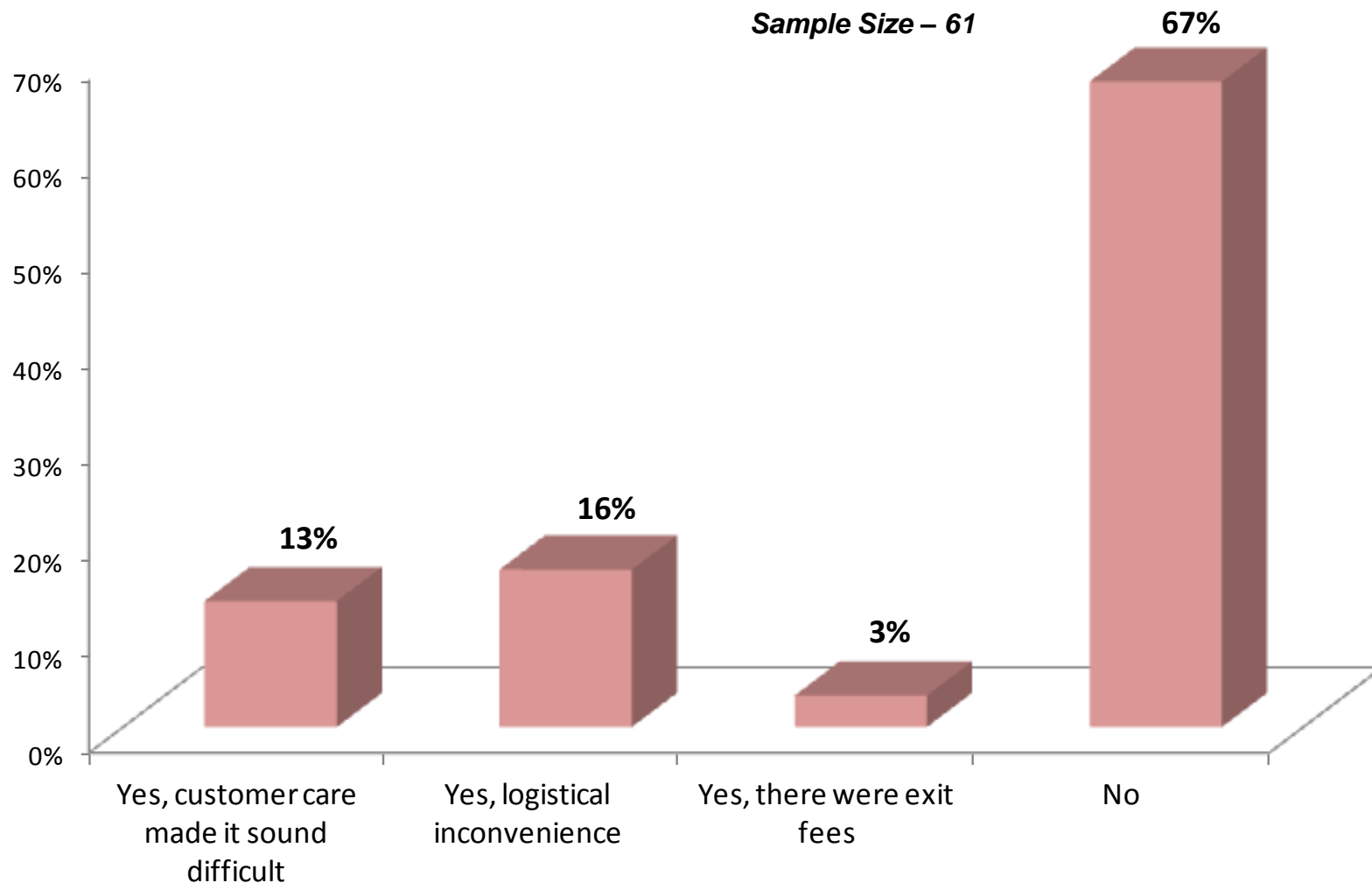
## What was the reason for changing the operator?

Sample Size – 61  
(each respondent could give more than one reason)





*Did you find it difficult to change the operator?*

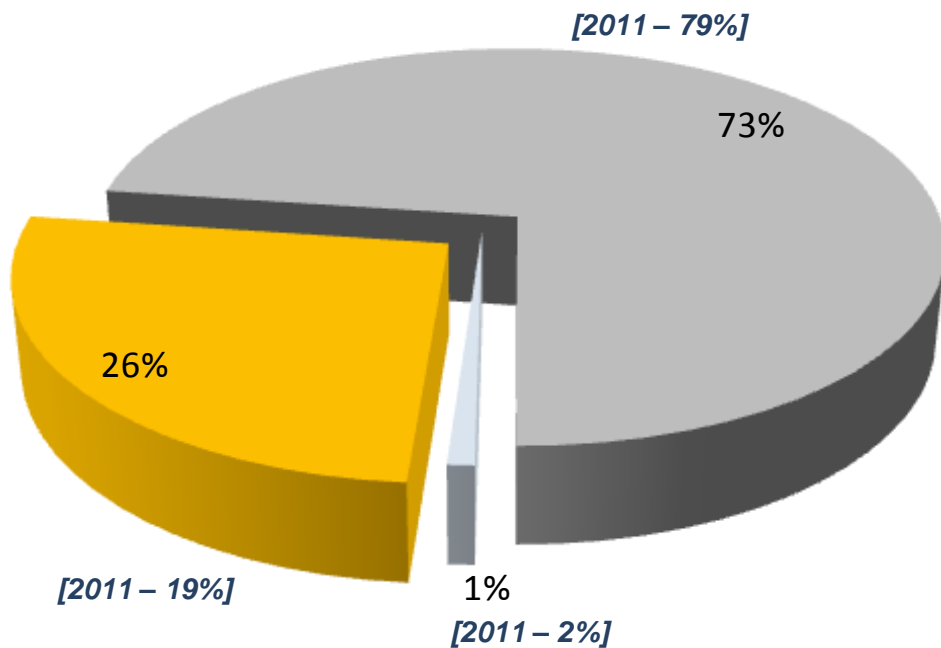


## 4. Internet TV

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## Do you use the Internet to watch TV?

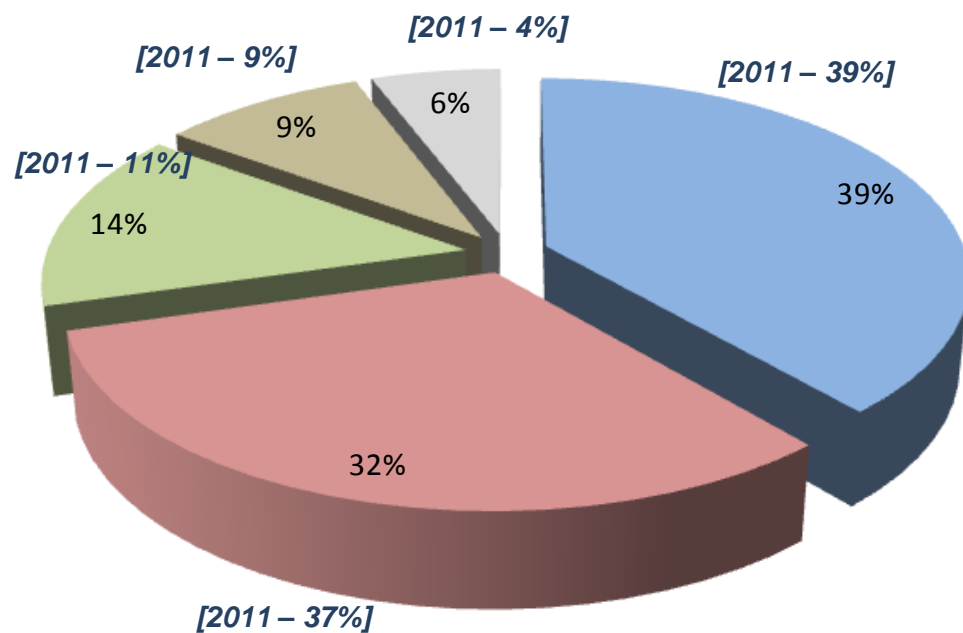
Sample Size – 794



Yes No Don't know

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

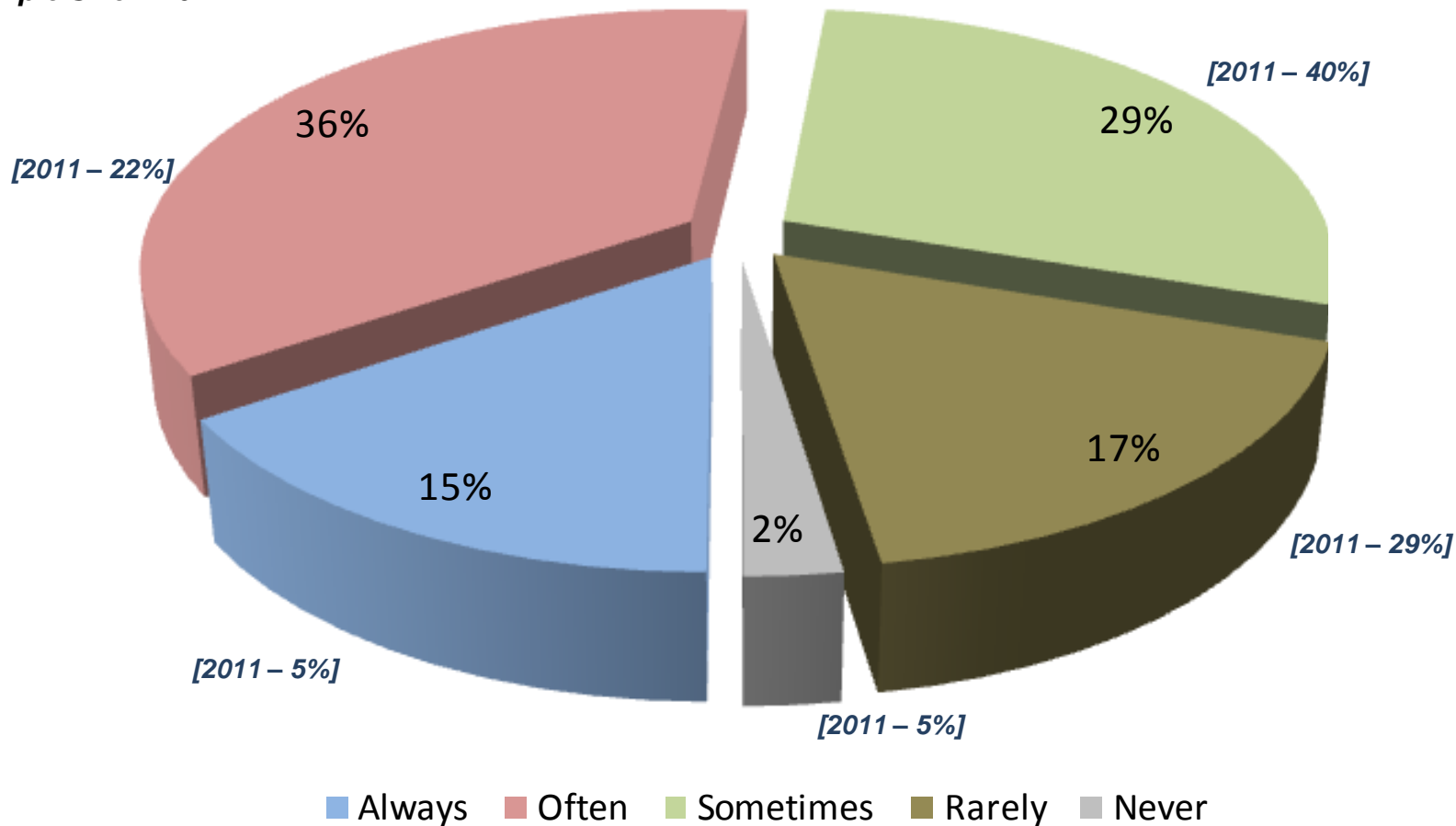
Sample Size – 207



1 2 3 4 5+

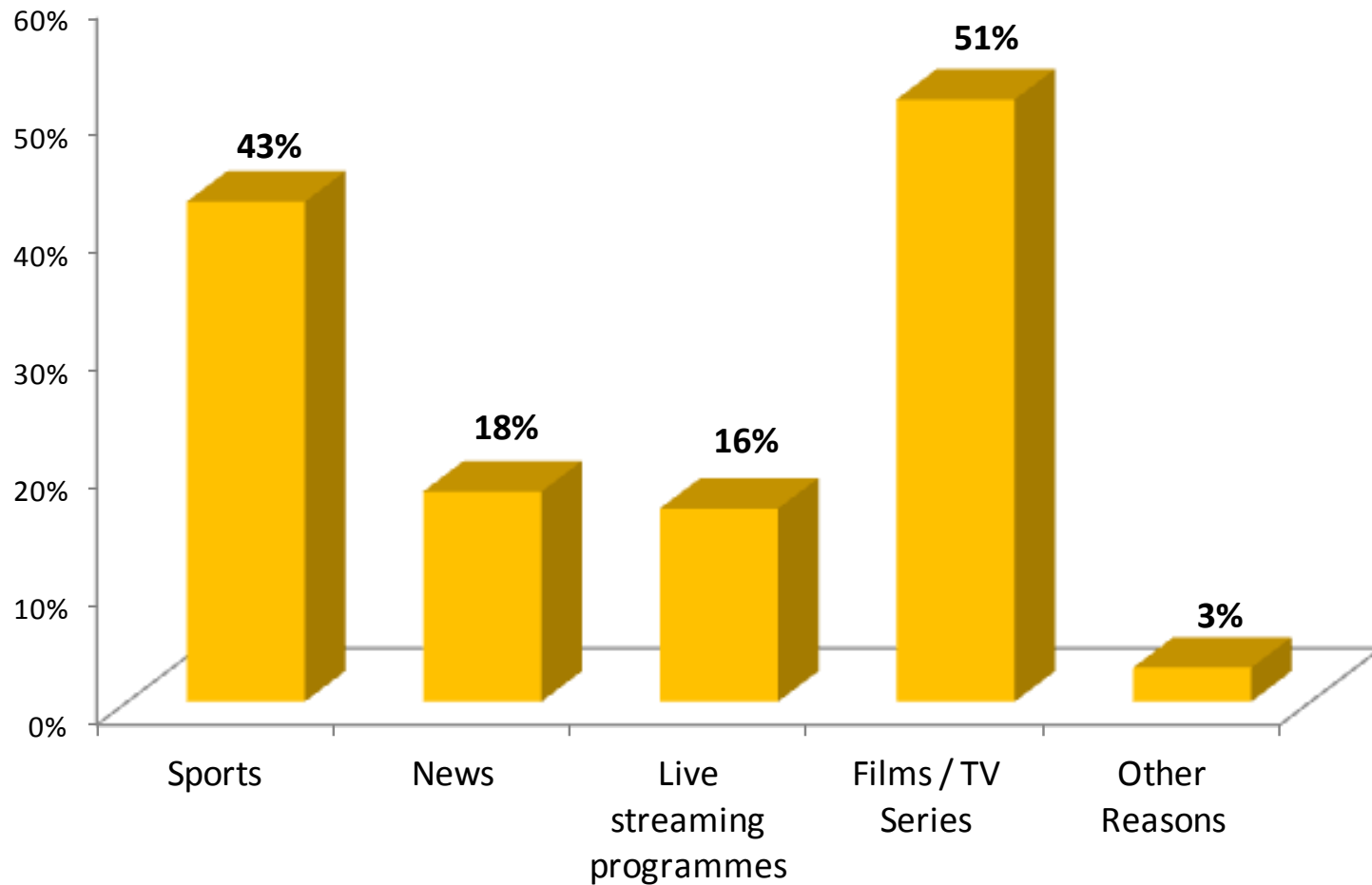
*How much do you consider Internet TV to be a good substitute to traditional TV?*

**Sample Size – 207**



## What do you watch most via Internet TV?

Sample Size – 207

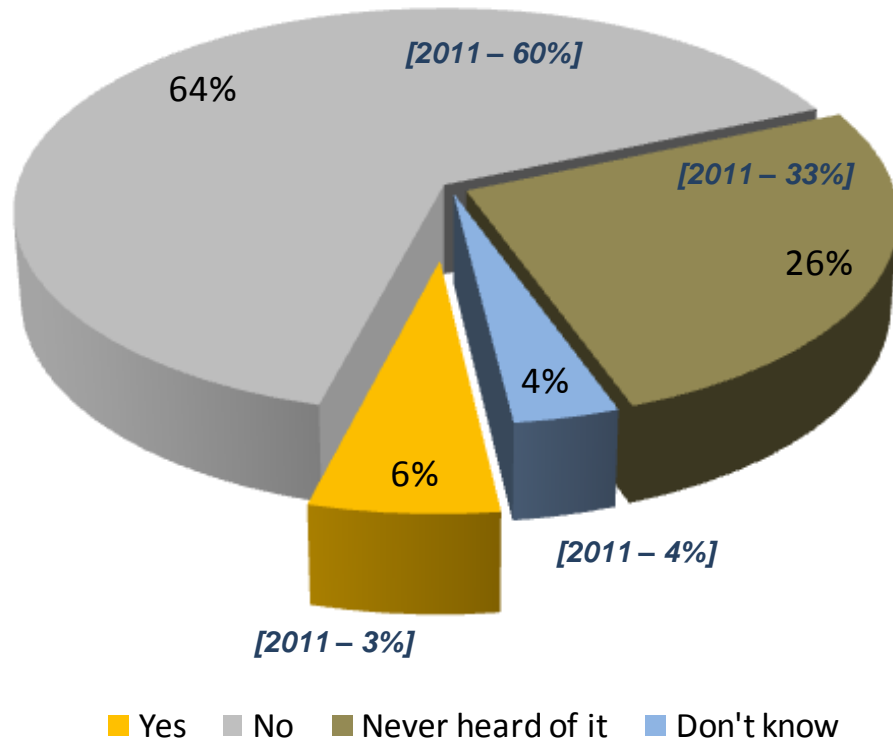


## 5. Digital Audio Broadcasting plus

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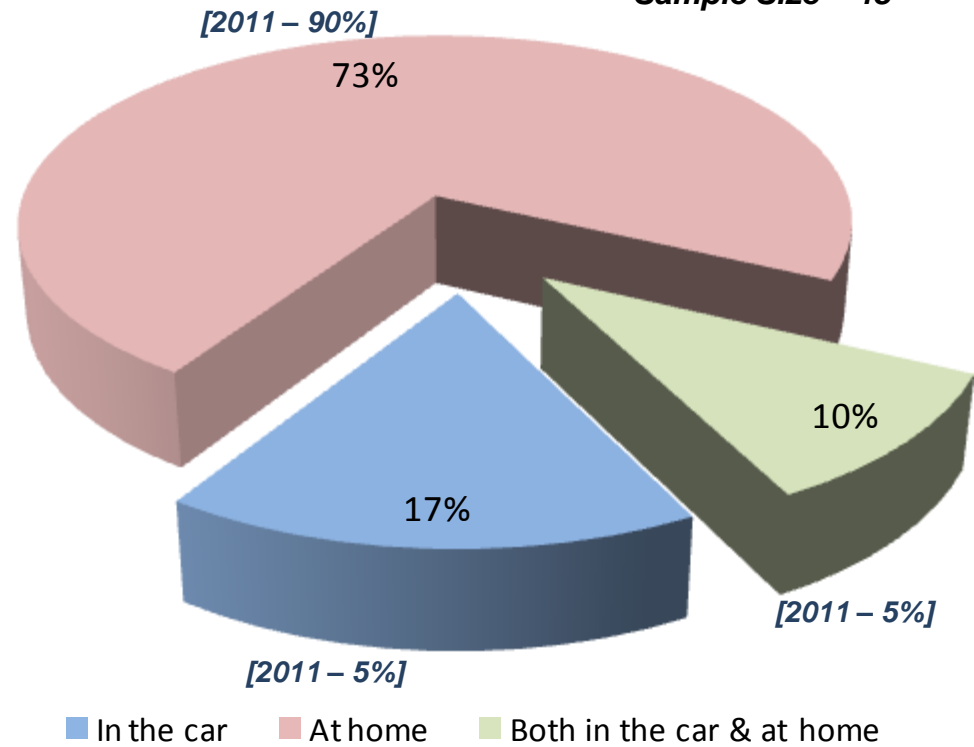
## Do you have a DAB+ radio set?

Sample Size – 794



## Where is the DAB+ radio set situated?

Sample Size – 48



*75% of households with a DAB+ radio set are highly satisfied with the quality of service it provides [50% in 2011]*

*Only 4% of households claim they are not satisfied, while circa 20% are just about satisfied with the DAB+ quality of service*

## 6. Main Highlights

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- 57% of Maltese households have at least one HD TV set [28% in 2011]
- 62% of Melita Digital subscribers are satisfied with the service provided [70% in 2011]
- 75% of GO DTTV subscribers claim to be satisfied with their TV service [78% in 2011]
- Channel line up has been cited as the main cause of dissatisfaction with the TV service of both operators
- 21% of Melita subscribers also cite billing issues as one of their main reasons of dissatisfaction
- Circa 25% of households are subscribed to one or more premium channels – 9 percentage points more than in 2011
- 8% of households claim to have changed their TV operator over the last two years [12% in 2011]
- The number of households using the Internet to watch TV grew from 19% in 2011 to 26% in 2013
- More households consider Internet TV to be a good substitute to traditional TV: Always – 15% [5% in 2011], Often – 36% [22% in 2011]
- 6% claim to have a DAB+ radio set [3% in 2011]



**Thank You**