MCA Survey Findings for TV

Consumer Perceptions

October 2025

MCA reference: MCA/S/25-5735

MALTA COMMUNICATIONS AUTHORITY

Methodology

Fieldwork and Sampling

PKF Malta carried out fieldwork between March and April 2025 on behalf of MCA		
Fieldwork	Sample	Responses
• 400 respondents - randomly selected. • 245 respondents - surveyed online / 155 respondents – surveyed via telephone interviews. • One person per household eligible for interview, aged 18 years or older.	• Stratification: - age composition of the Maltese population; - distributed across Malta's geographical regions; - distributed across socio-economic categories; - taking into account operators' market share of service (weighting was applied to reflect the actual market composition and ensure representativeness).	• 400 net respondents to the survey. • Margin of error: +/- 4.9% at a 95% confidence interval.

Weighted survey data findings

Weighting formula

$$Weight = \frac{Market\ share\ (\%)}{Sample\ share\ (\%)}$$

- Weights were determined using the formula above to adjust for over- or under-representation of each operator in the sample.
- These weights were applied to each respondent based on their operator to ensure the results reflect the actual market distribution.
- Raw sample sizes indicated in the slide headings are provided for reference. However, all results presented in the charts are based on weighted data. This approach is applied consistently throughout the report.

Key Insights

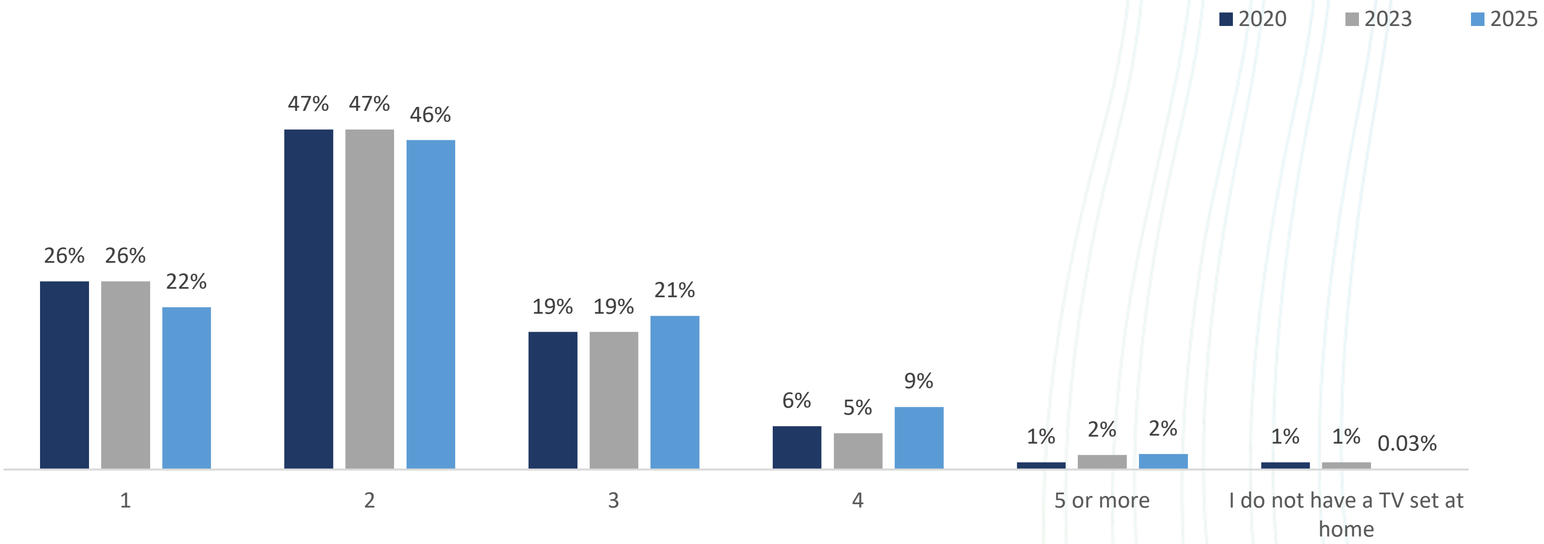
Key insights

- Television continues to be a household staple, with 99.9% of respondents reporting at least one TV set at home
- The number of **respondents with more than one TV set increased** from 73% in 2023 to 78% in 2025, while Smart TV’s are available in 86% of households.
- The **use of local operators’ apps to access TV content** increased from 25% in 2023 to 27% in 2025. Around half of users rely solely on apps (i.e. do not have a set-top box).
- **Internet TV service usage stands at 47% of respondents with a local Pay-TV subscription** and at 53% of those without.
- **Those experiencing at least one service fault** in the 12 months prior to the survey was up from 50% in 2022 to 59% in 2025. Nonetheless, **satisfaction with how operators handled these faults** improved, rising from 58% to 67%.
- **Switching** from one operator to the other remains low, at 5%.
- More users see **alternative content services as a solid substitute for traditional TV** - rising from 13% to 19% for Android boxes, and from 40% to 53% for internet TV services.
- 25% of all respondents **make use of DAB+ services**, up from 19% two years back.

Ownership and Access

Number of TV sets at home

Total number of respondents – 400

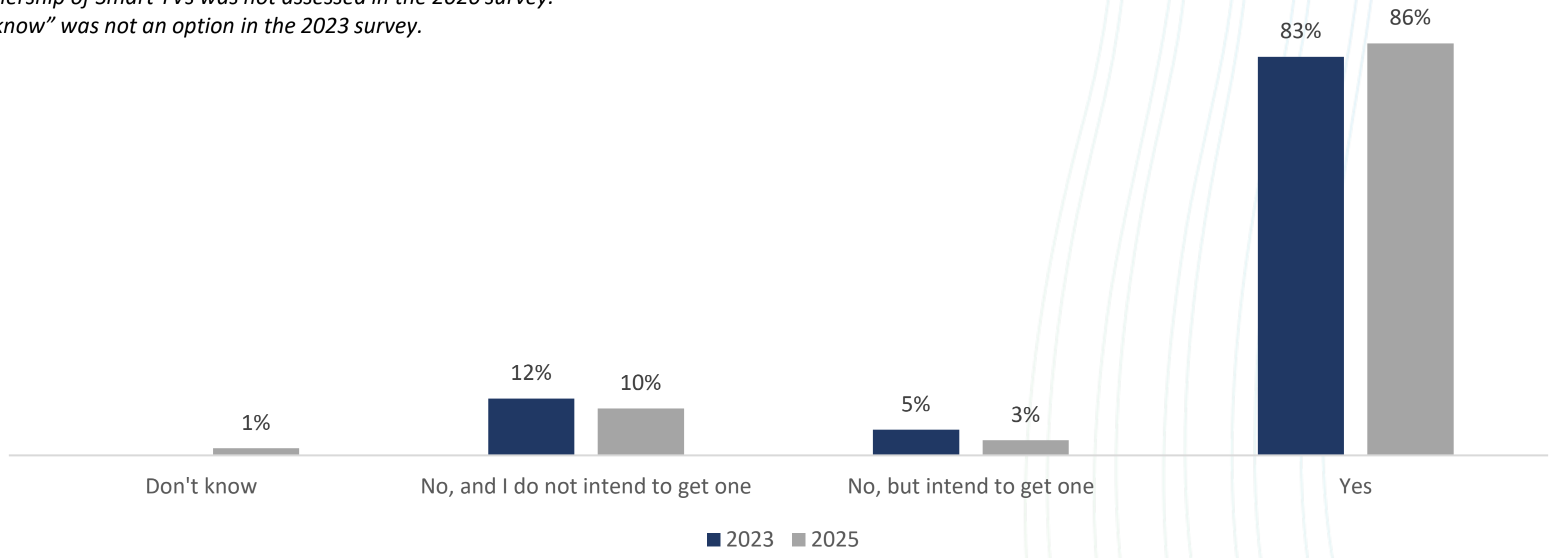


Ownership of Smart TVs

Number of respondents with a Smart TV at home – 338

i.e. 86% of all respondents with a TV at home

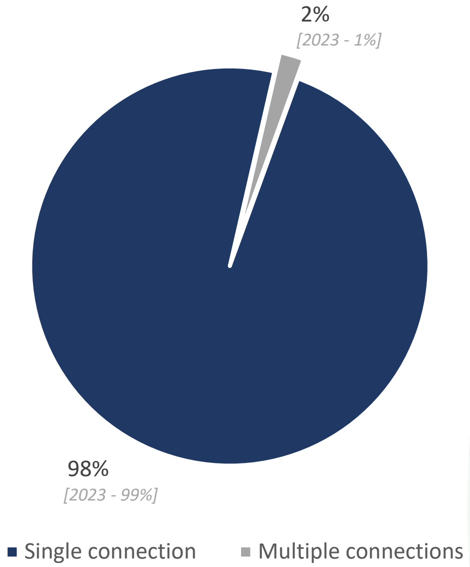
** The ownership of Smart TVs was not assessed in the 2020 survey.*
** “Don’t know” was not an option in the 2023 survey.*



Subscriptions for local Pay-TV services

Number of respondents with a local Pay-TV subscription – 353

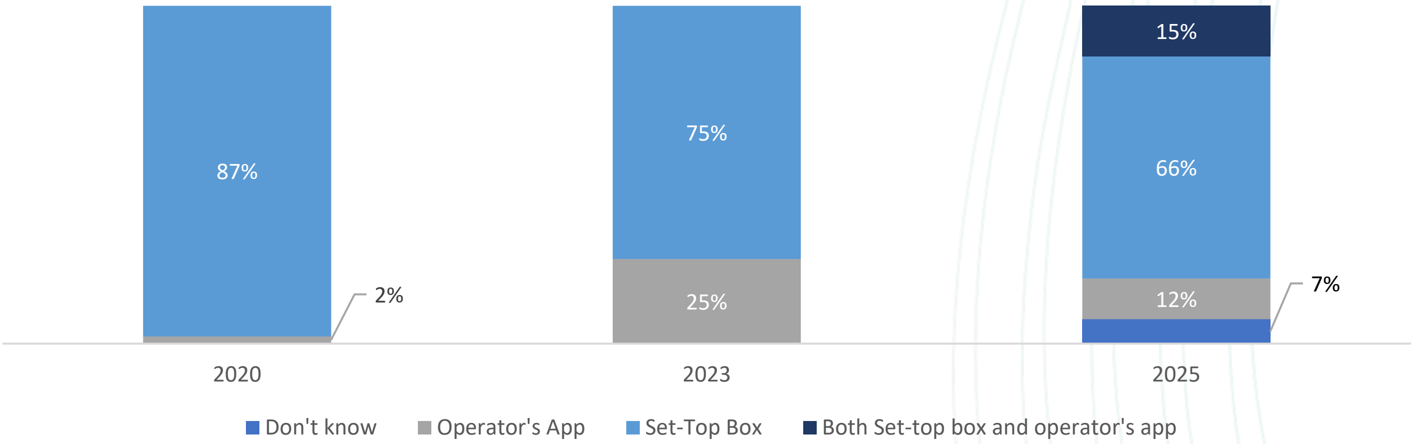
i.e. 88% of the total number of respondents



Type of access

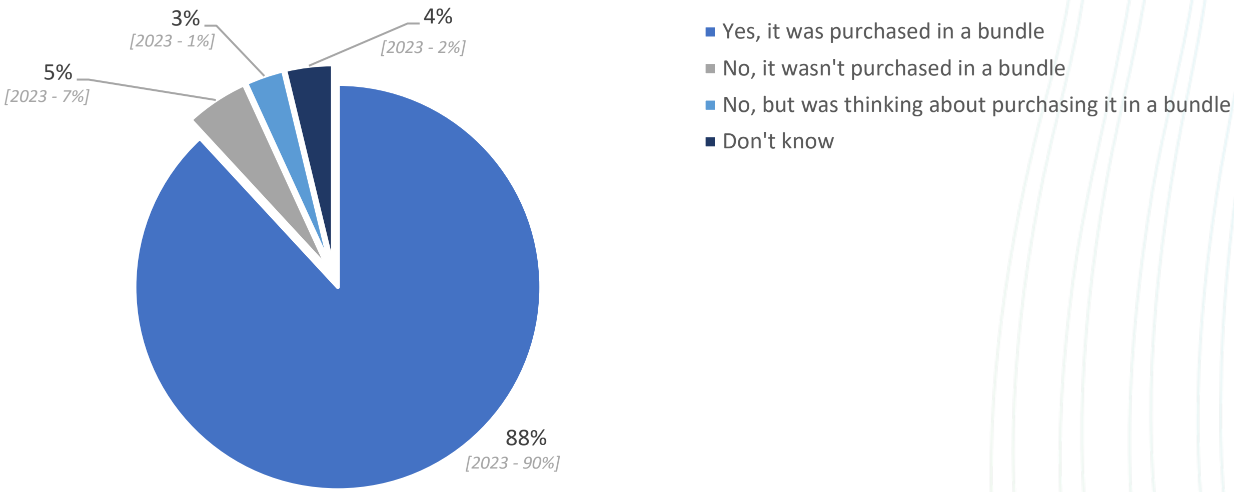
Number of respondents with a local Pay-TV subscriptions – 353

** In cases where respondents are subscribed to more than one operator, their usage patterns were included for each operator they reported using.*
** In 2020 and 2023, the survey only asked about app usage. Respondents with a local TV subscription who said they did not use their operator's app are assumed to have relied solely on a set-top box. However, for app users, it is unclear whether they accessed it alone or together with a set-top box.*
** In 2025, respondents were asked about both app and set-top box usage separately, and could indicate use of both.*



Purchasing the service in a bundle

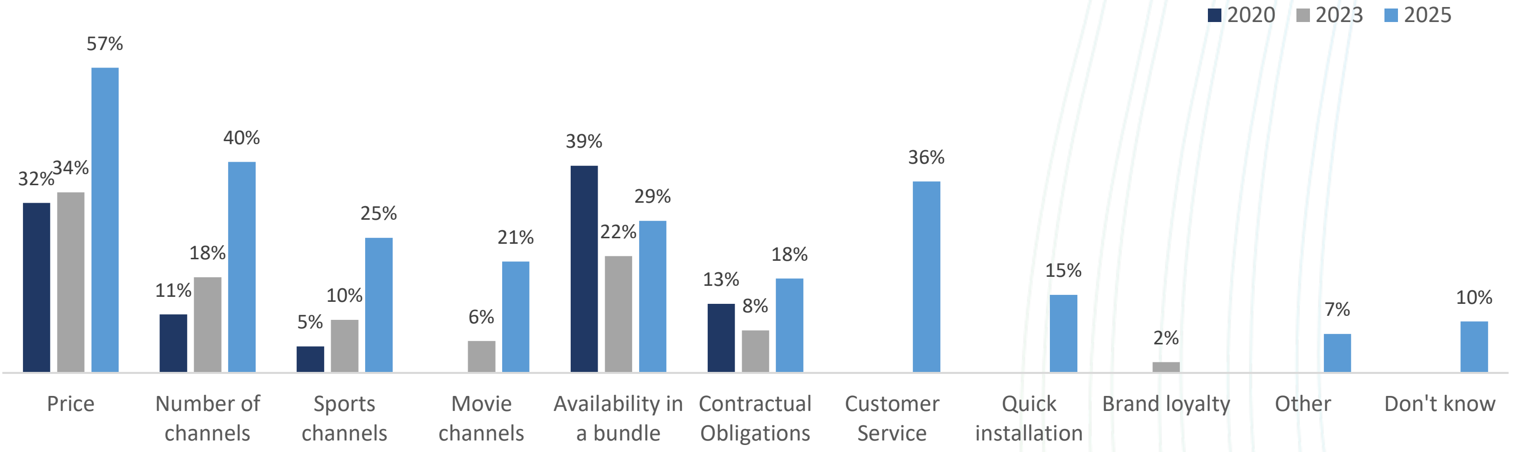
Number of respondents with a Pay-TV subscription – 353



Product features and their influence on choice

Number of respondents with a local Pay-TV subscription – 353

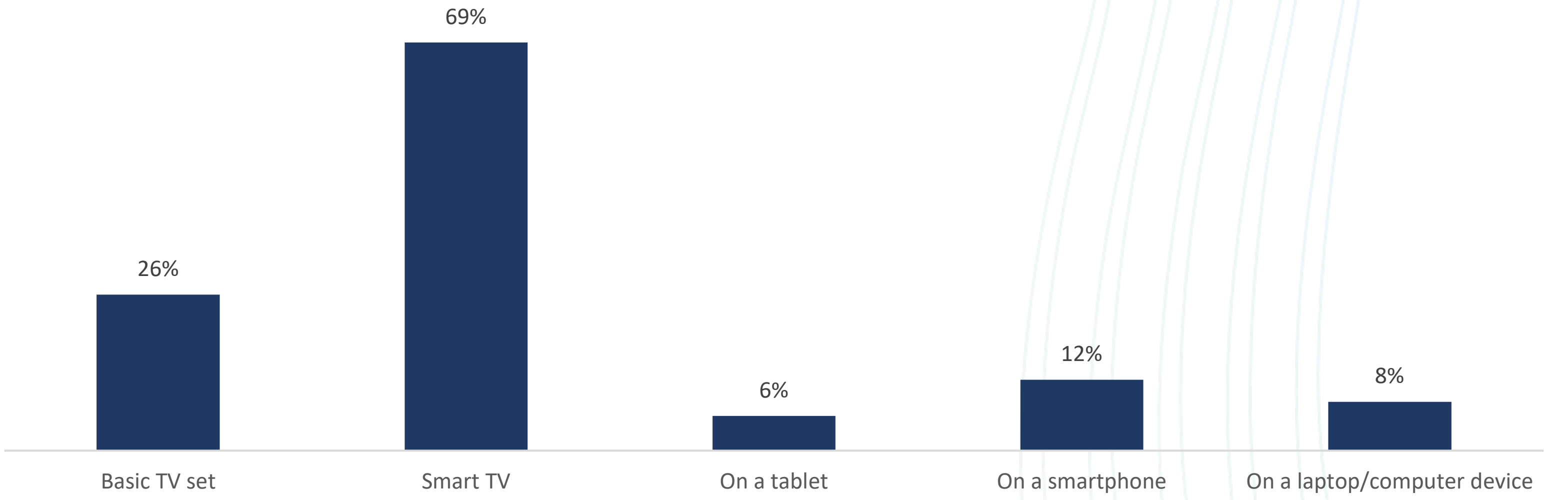
** Respondents could provide multiple answers.*
** 'Brand loyalty' was not included as an option in the 2025 survey .*
** 'Customer service' and 'Quick installation' were not included as options in previous surveys.*



Devices used to watch TV

Number of respondents with a Pay-TV subscription – 353

** Respondents could provide multiple answers.*

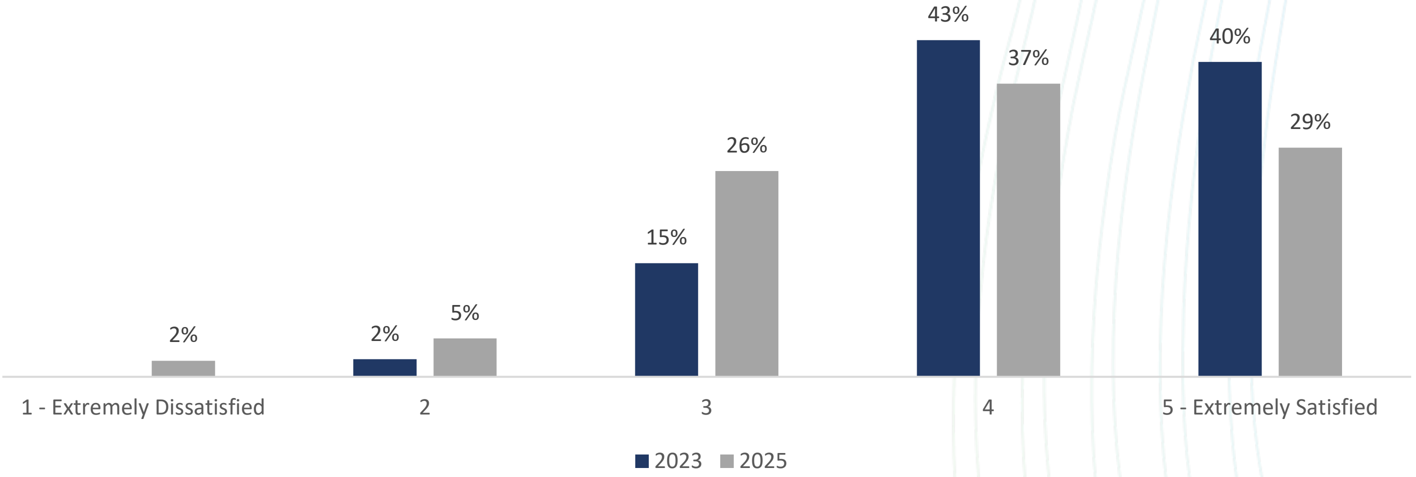


Satisfaction with operators' TV apps

Number of respondents making use of the operators' apps, be it independently or with a set-top box – 110

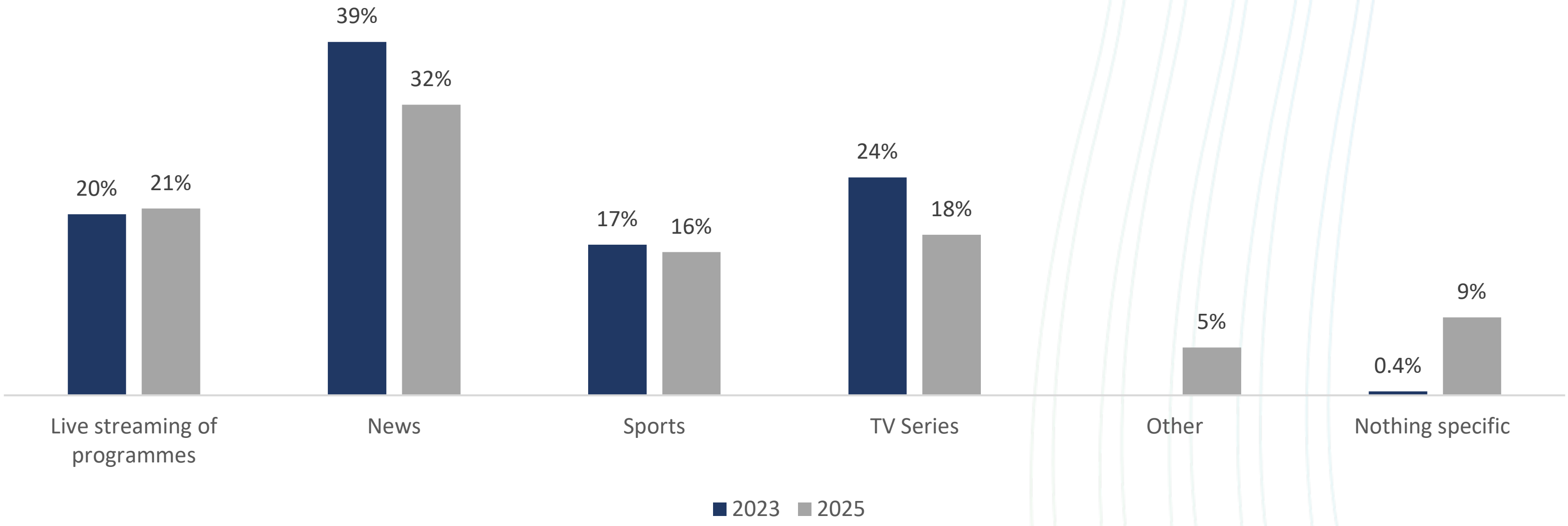
i.e. 31.2% of the respondents with a local TV subscription

** In cases where respondents are subscribed to more than one operator, their usage patterns were included for each operator they reported using.*
** This question was not asked in the 2019 survey.*



Type of programmes and content watched

Number of respondents who have a Pay-TV subscription - 353



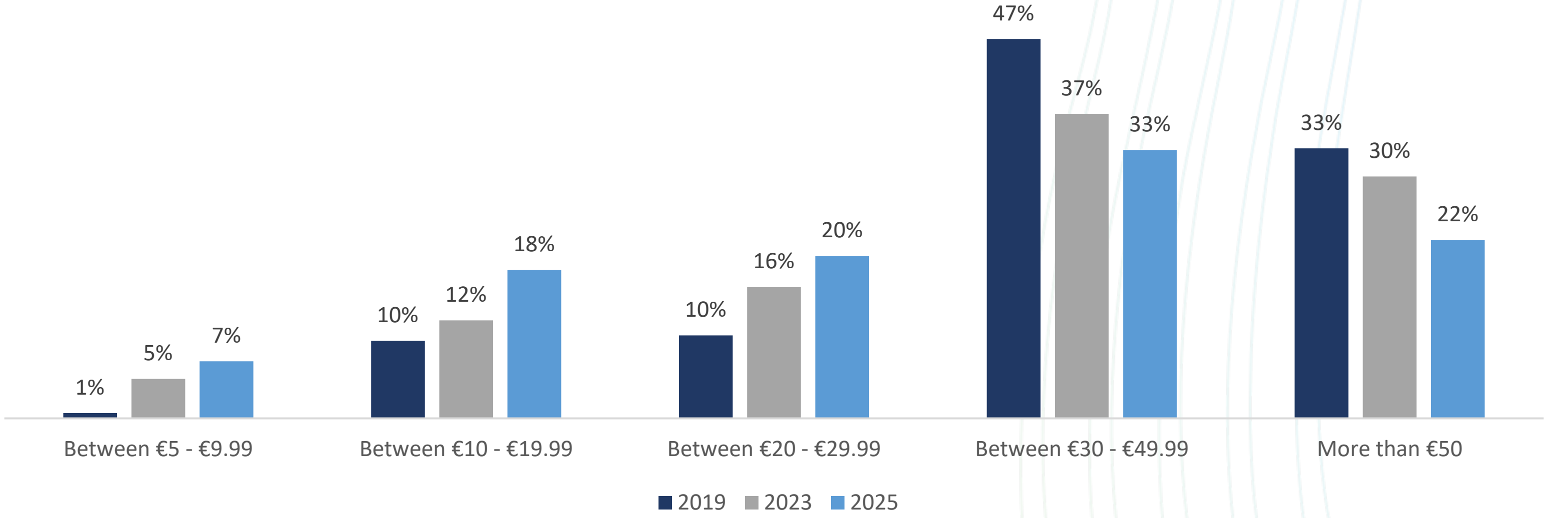
Expenditure, Quality of Service and Switching

Average monthly expenditure on local Pay-TV

Number of respondents with a Pay-TV subscription – 353

Half of which were unaware of their monthly Pay-TV expenditure

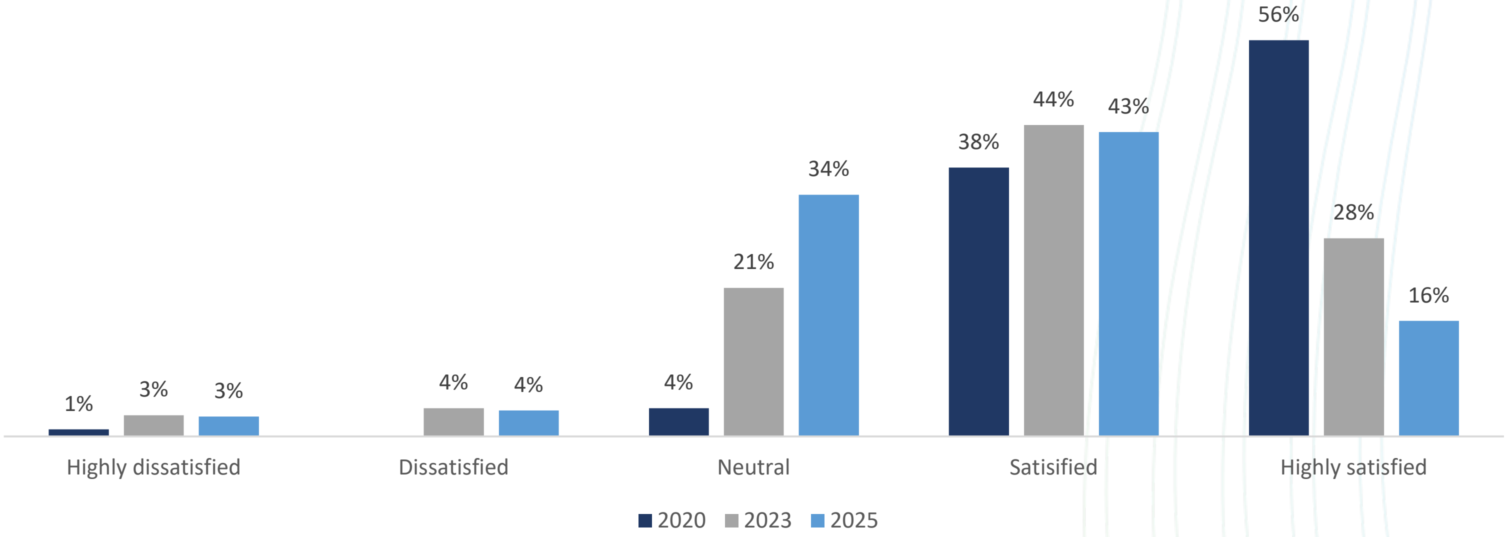
** Respondents unaware of their monthly expenditure were excluded from the analysis below for comparative purposes (43.4% in 2023).*



Perceptions on quality of local Pay-TV services

Number of respondents with a Pay-TV subscription – 353

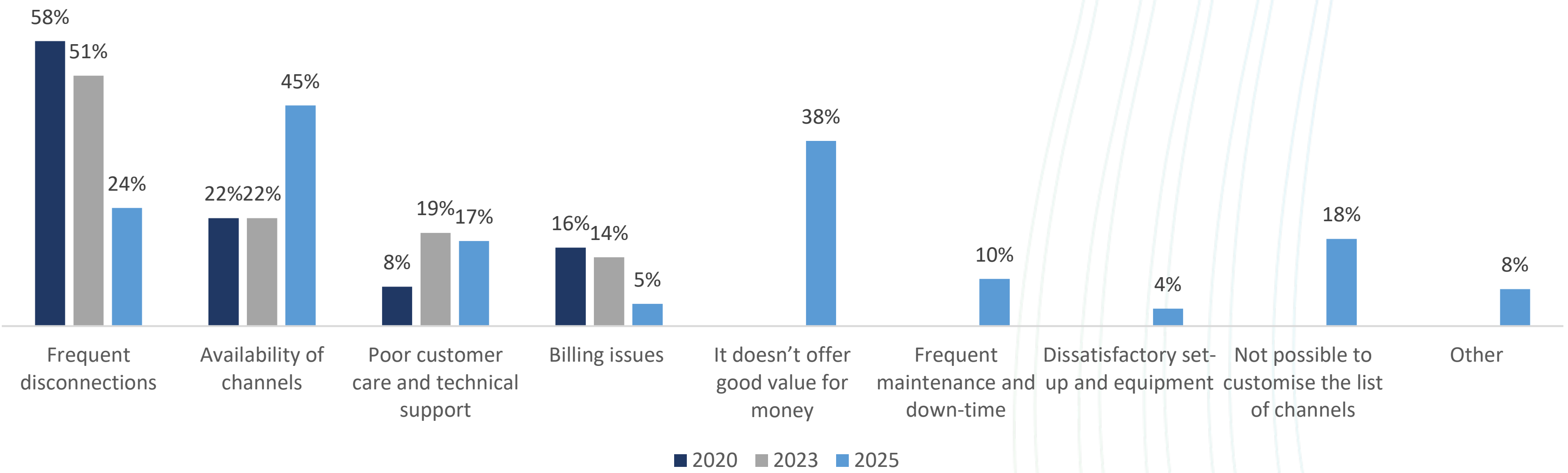
** The results are based on 329 respondents, as 24 individuals did not provide an answer to this question.*



Factors behind neutral or dissatisfied ratings

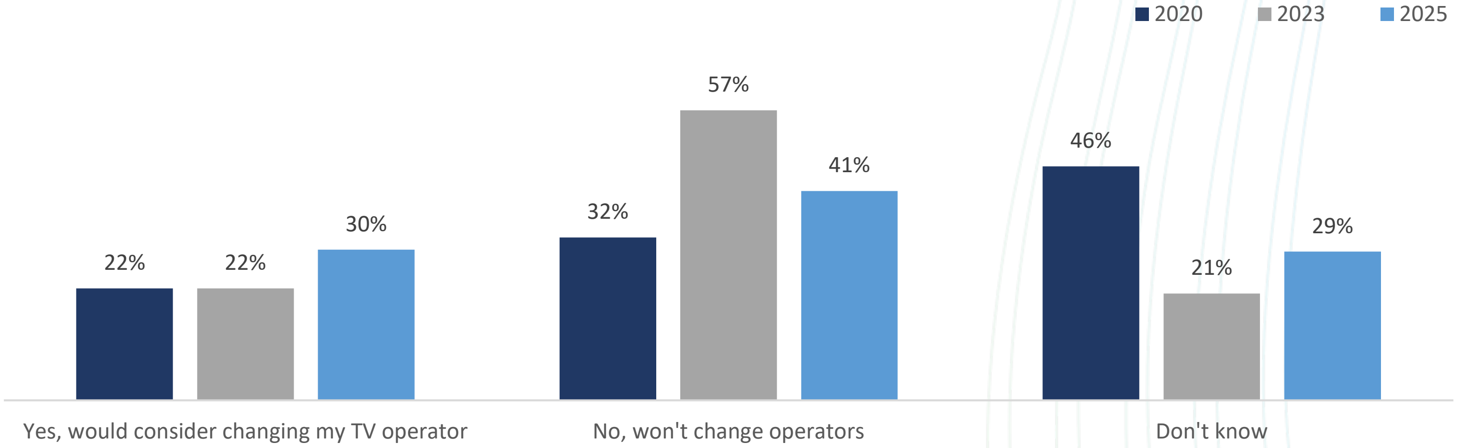
Number of respondents expressing dissatisfaction or neutrality towards quality of the service - 140

** The list of reasons was revised in the 2025 survey.*



Switching considerations among neutral or dissatisfied users

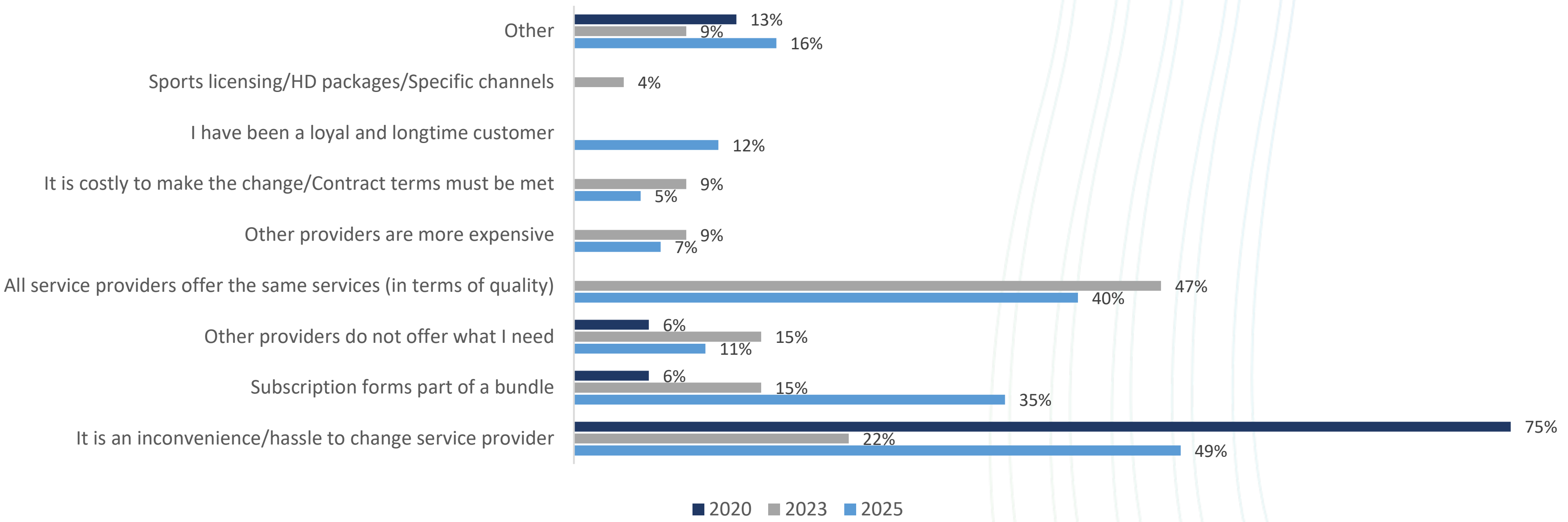
Number of respondents expressing dissatisfaction or neutrality towards the service - 140



Reasons for not switching despite neutrality/dissatisfaction

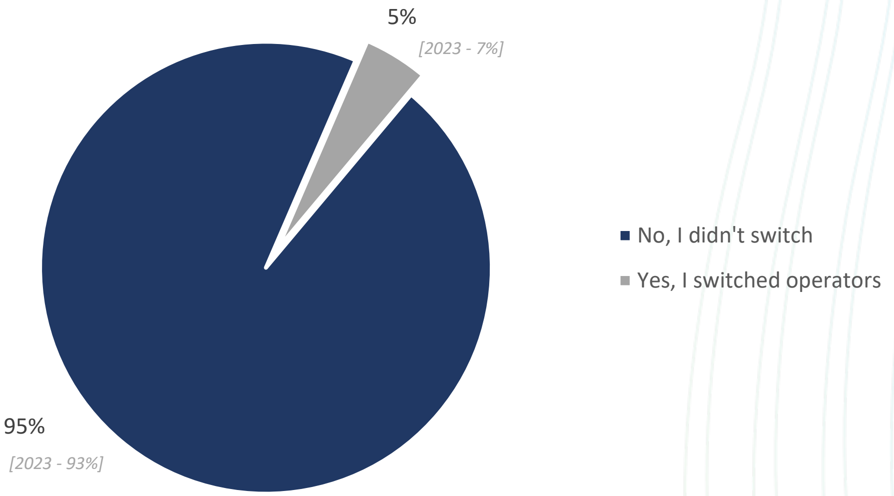
Number of respondents who do not consider changing their main subscription - 56

** Respondents could provide multiple responses*



Overall switching in the two years prior to survey

Number of respondents with a Pay-TV subscription – 353

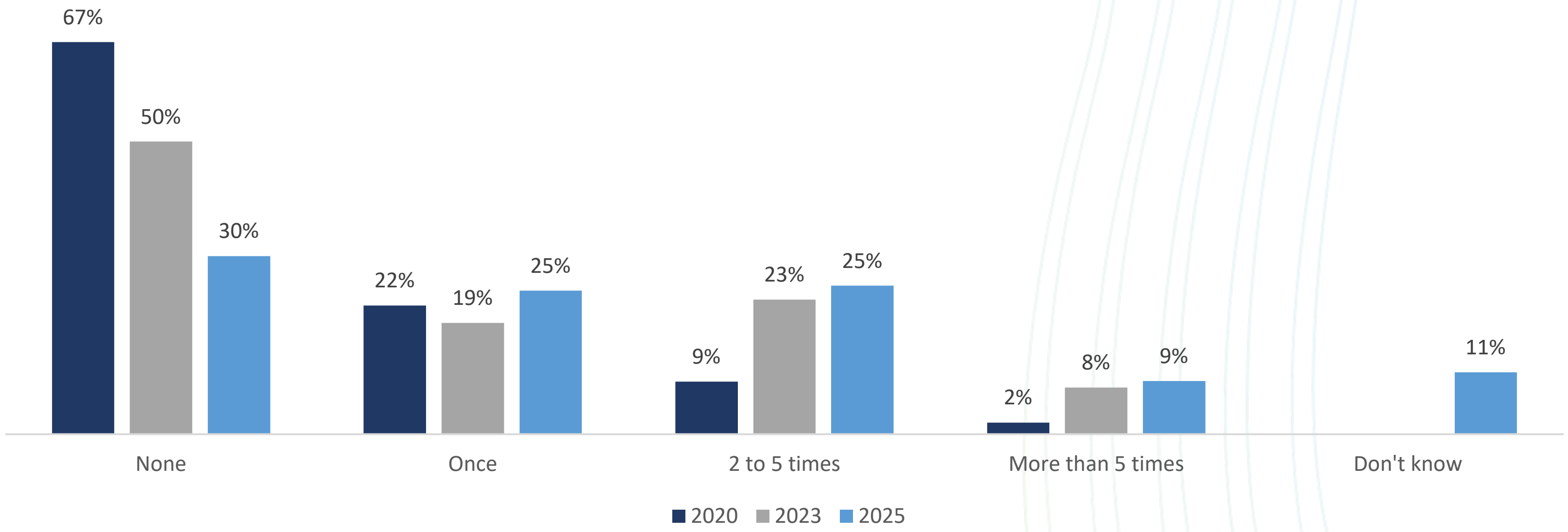


Faults and Resolution

Reported faults and disconnections

Number of respondents with a Pay-TV subscription – 353

** "Don't know" was not an option in previous years.*

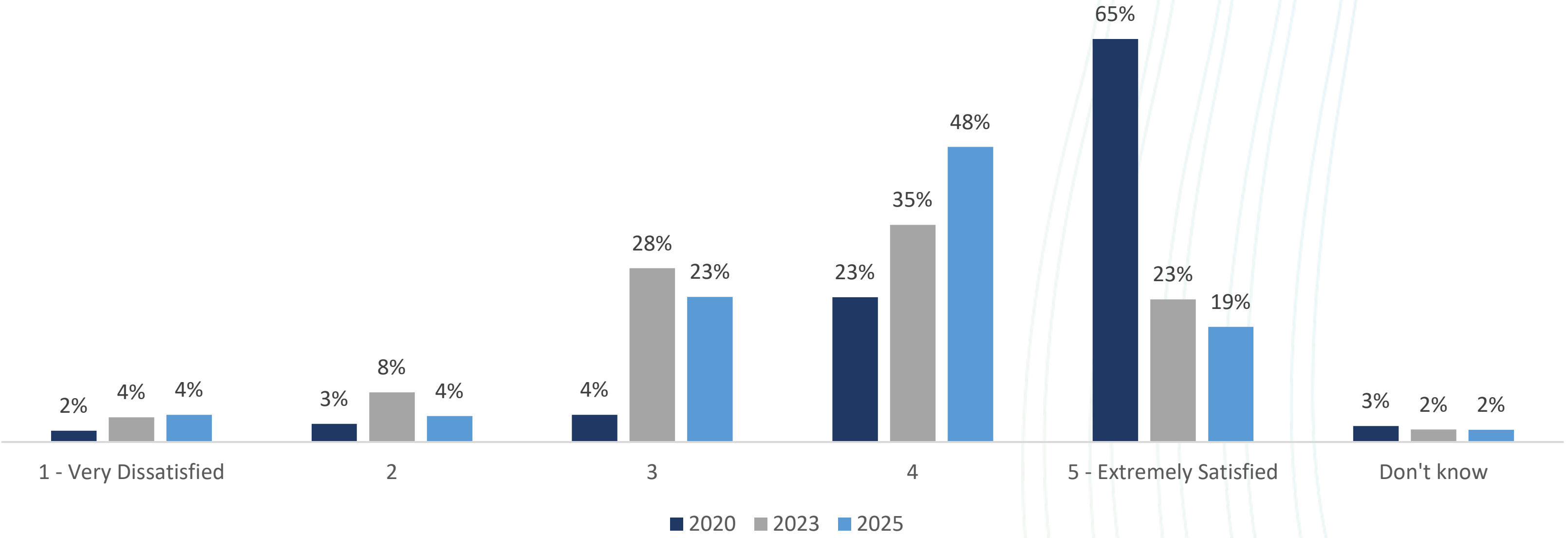


Satisfaction with how operators responded to reported problems

Number of respondents experiencing faults and disconnections – 213

Of which 7% did not report their issues to their respective operator

** For comparative purposes, those that did not report a problem were excluded from the analysis.*



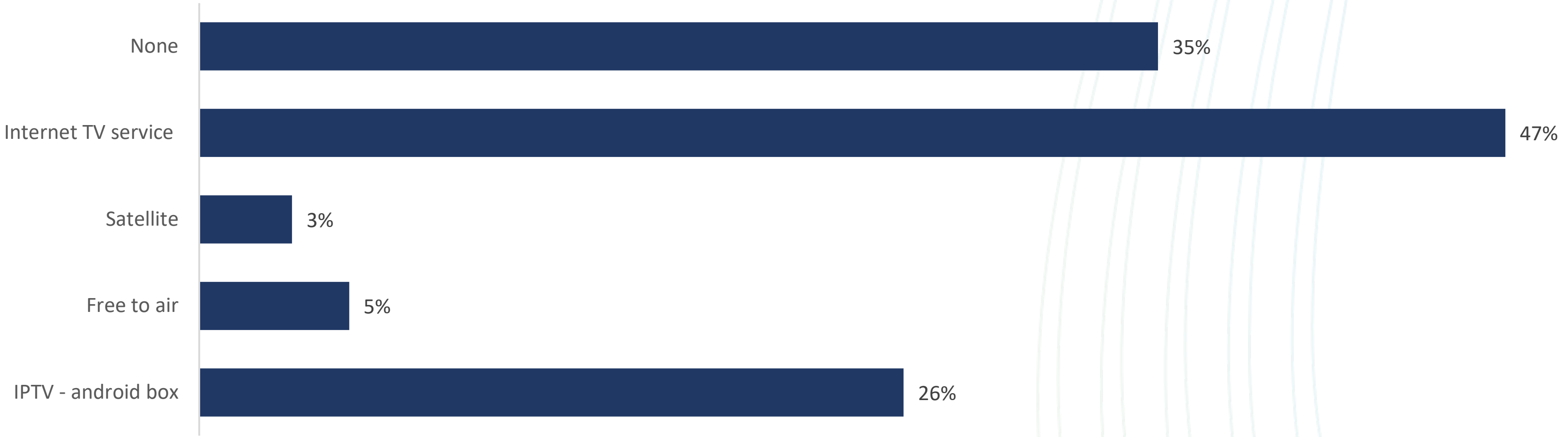
Alternatives to Pay-TV Services

Access of alternative platforms by local Pay-TV clients

Number of respondents with a TV set at home – 353

Of which roughly three in five respondents made use of other TV platforms in addition to their local TV service

** Respondents could choose multiple responses*
** In previous years, this question was asked only to those without a local Pay-TV subscription, in order to assess alternative content usage*

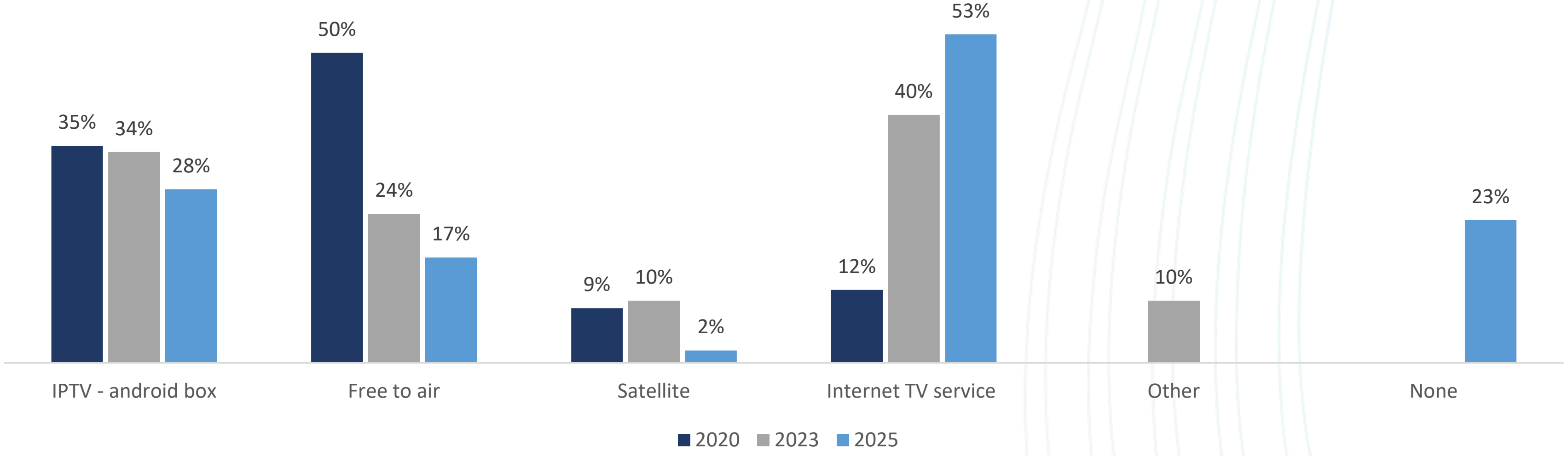


Access of alternative platforms by locals with no Pay-TV

Number of respondents without a local Pay-TV subscription - 47

i.e. 12% of the total number of respondents

** Respondents could choose multiple responses*
** "None" was not an option which was provided in previous years*

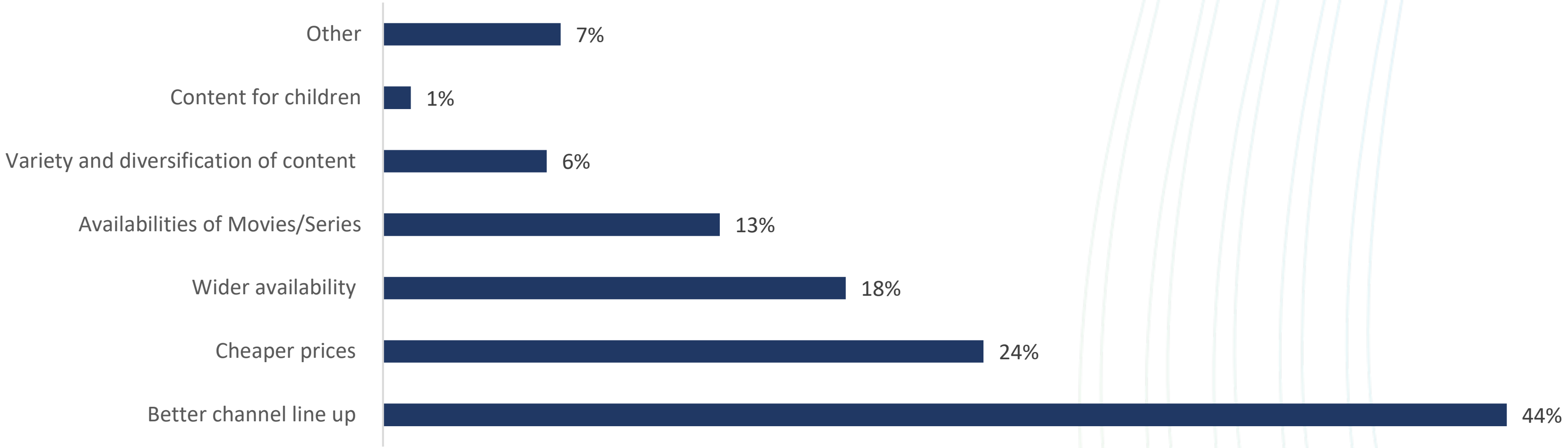


Reasons for viewing content on alternative platforms

Number of respondents who make use of alternative platforms – 269

i.e. 68% of the total number of respondents

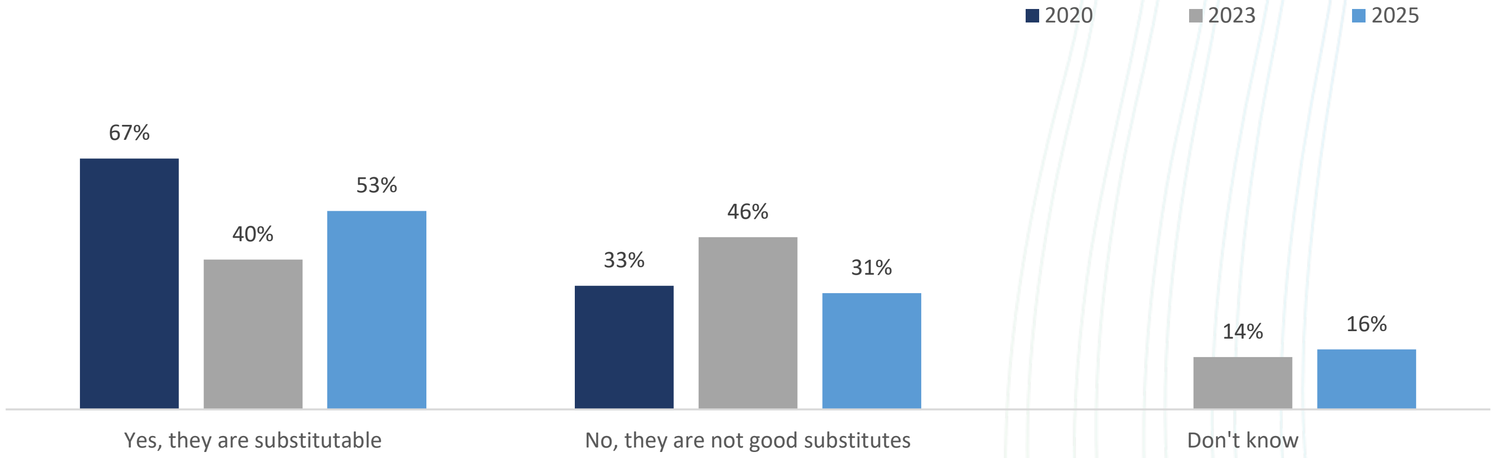
** Respondents could choose multiple responses*
** Unlike previous years, where this question was asked only to individuals using Android boxes as an alternative to Pay-TV services, the current round expanded the scope to include all respondents who use alternative platforms (Free to air, satellite, Android box, internet services etc), regardless of whether they also have a local Pay-TV subscription.*



Internet TV services as a replacement for Pay-TV

Total number of respondents - 400

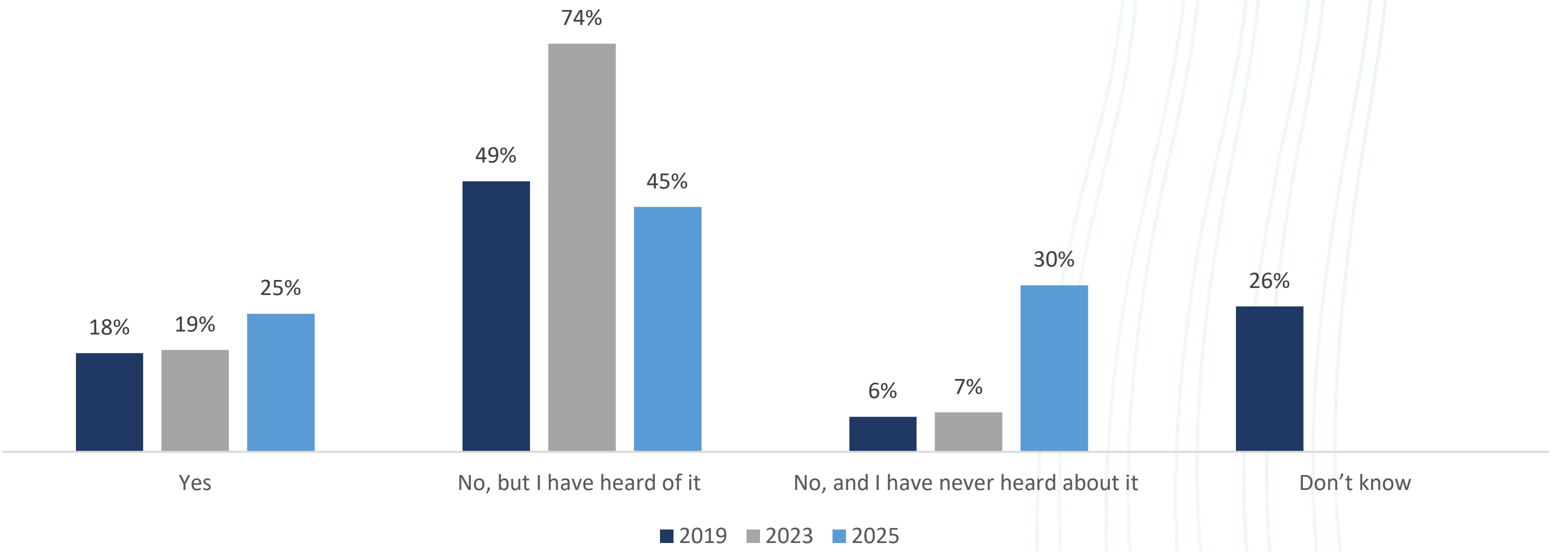
** The "Don't know" group comprises individuals who have either never used internet services (14%) or have never subscribed to local Pay-TV (2%). Combined, these account for 16% of all survey respondents.*



Digital Audio Broadcast (DAB+)

Usage and awareness of DAB+ radio set

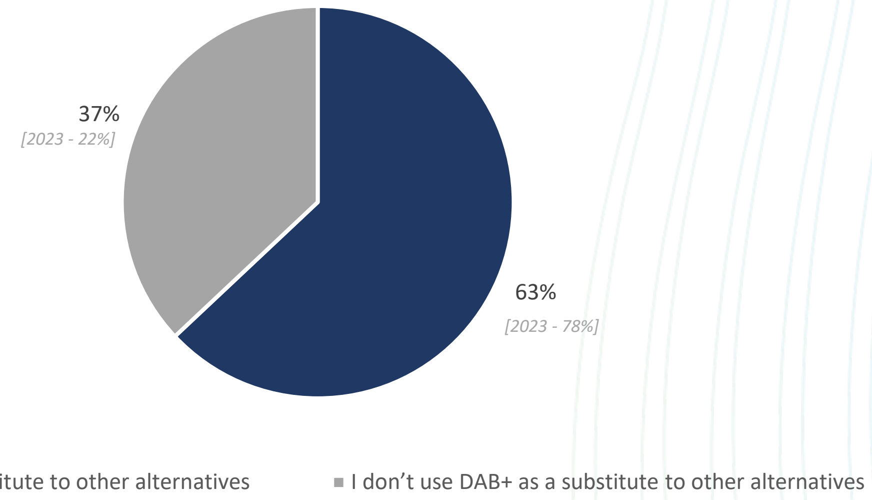
Total number of respondents - 400



DAB+ as a replacement for FM radio or alternative platforms

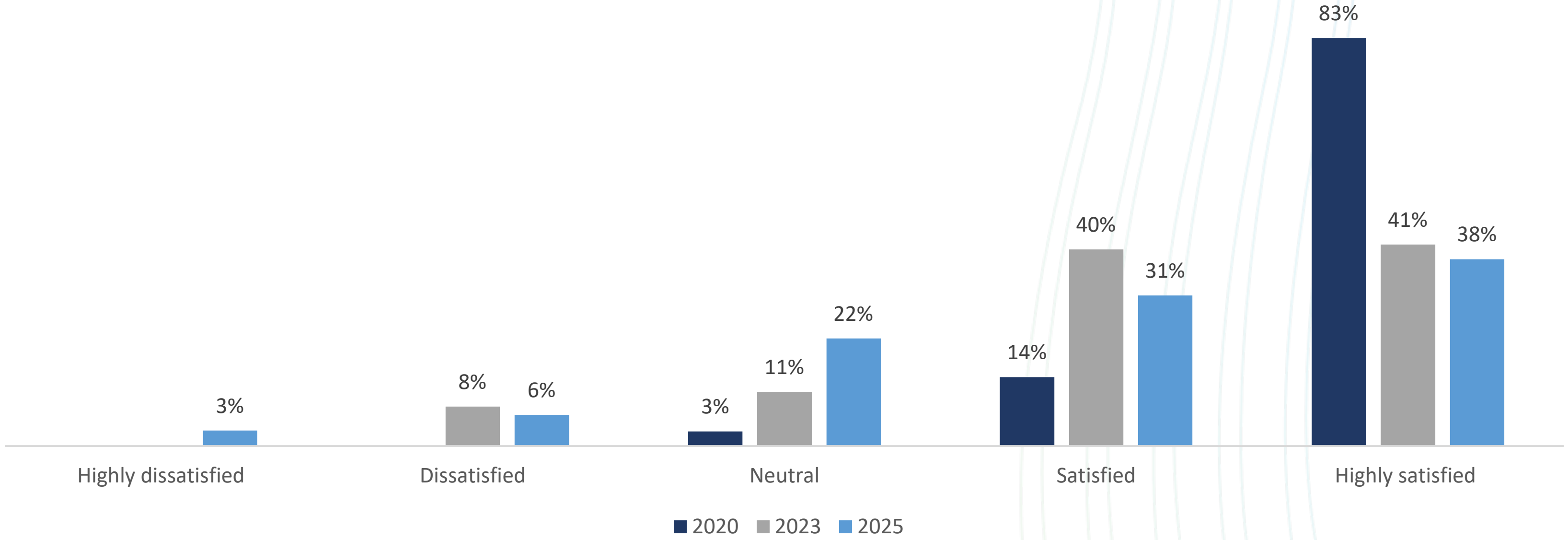
Number of respondents who listen to DAB+ radio - 94

Of which more than half make use of DAB+ as an alternative to FM radio and other audio content



Satisfaction with the quality of DAB+ service

Number of respondents who listen to DAB+ radio - 94



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