MCA Consumer Perception Survey – Pay-Tv

Findings from a perception survey carried out between November 2019 and April 2020

The MCA is hereby publishing the findings of a consumer perceptions survey that relate to the household customer behaviour, preferences and satisfaction in the pay-Tv and broadcasting segment in Malta.

Survey findings are derived from 873 randomly selected respondents submitting responses via computer-assisted telephone interviews (CATI). Fieldwork was carried out by the MCA's external contractor EMCS.

Number of TV sets at home

Over 99% of respondents say they have a TV set at their residence, and a substantial number of these (almost three-quarters) have more than one TV set.

Additionally, 92% of those having a TV set say they own at least one HD TV, which marks a significant increase of 25% over the respective 2017 survey result.

Pay-Tv take-up

The latest exercise shows a 10 percentage point rise in the share of households with a pay-TV subscription in a bundle, up to 77% from 67% in 2017. A further 3% of survey respondents say they intend purchasing a bundle–based TV subscription in the coming months.

The use of IPTV-Android service

72% of survey respondents have no IPTV-Android box, whilst 19% do have such a device at their residence. The latter figure is down by 4 percentage points compared to the figure reported in the 2017 survey.

88% of those with an Android box believe that what they get via this medium is a good alternative to standard Pay-Tv, mainly because of a better channel line-up. Around 8% of survey respondents having a Pay-Tv subscription have also indicated their intention of acquiring an IPTV-Android box over the next year,

Level of customer satisfaction

Household pay-TV customers show high levels of satisfaction with the overall service quality. The share of respondents saying they are highly satisfied with the service rose from 23% in 2017 to 56% in the 2020 survey. An additional 38% say they are satisfied with the quality of service. Just around 1% of survey respondents say they are highly dissatisfied with the service attributing 'Frequent Disconnections' as the main reason for their response.

Knowledge of monthly expenditure and prices

Whilst 44% of respondents do not know their monthly expenditure on the pay-TV service, the current survey shows more people knowledgeable on this variable than was the case in

2017. In fact, the share of survey respondents saying they are aware of their pay-TV monthly expenditure increased from 45% to 55%. Slightly more than half of the latter respondents consider their monthly pay-TV expenditure as reasonable. The main reason cited for not knowing their Pay-Tv expenditure was that the service is purchased in a bundle.

Switching between service providers

Switching between pay-TV service providers in the last two years was low, at just 4% of survey respondents. This notwithstanding that the switching activity is generally a rather smooth process. In fact, 82% of all switchers say they experienced no problems in carrying out the switch, whilst the rest say they experienced difficulties related to contract terms, unhelpful customer care and bundling issues.

Internet TV

14% of survey respondents say they watch Internet-TV channels. However, compared to the 2017 survey, the current exercise shows a 20 percentage point drop in such respondents. 67% of respondents watching internet TV see this platform as a good alternative to Pay-Tv, up 37 percentage points from 2017.

DAB+ radio

Just less than half the respondents stated that they did not have a DAB+ radio set whilst 18%, representing an increase of 4 percentage points over the 2017, said that they had the device. From those owing a DAB+ radio the majority (97%) of respondents have declared their satisfaction with its quality of service. Also, those who do have the radio; 45%, 30% and 33% said that their device was installed at home, in the car, and both at home and in car respectively.

Background to the survey function at the MCA

The MCA has been regularly carrying out the Consumer Perception Surveys on a biennial basis since the 2008. The main purpose of this exercise is to gather information on the level of satisfaction of local consumers with the products and services offered by the electronic communications service providers and the extent to which these providers are able to address the demands of the customers using their services. Given that these surveys have been carried out regularly for a number of years, results are indicative of how end-user choices developed over time and how local service providers address demand.

The results of these surveys also serve as an additional source of information for MCA's regulatory decisions, in order to ensure an environment that is conducive to sustainable competition and investment.

Methodology and Fieldwork

The research methodology employed the use of Telephone Computer-Assisted Interviewing (CATI) at fieldwork stage.

Stratified sampling was used in accordance with the age composition of the Maltese population. Interviews were distributed among Malta's six official geographic regions and carried out across different socioeconomic categories of the Maltese population.