

# MCA Market Research

## *Consumer Perception Survey Results – Internet*

*Malta Communications Authority*  
*August 2011*

## Presentation Structure

1. Purpose and methodology
2. Computer and internet access in households
3. Type and speed of internet connection in households
4. Analysis on internet providers in Malta
5. Pricing analysis

# 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 6 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. Computer & Internet Access in Households**

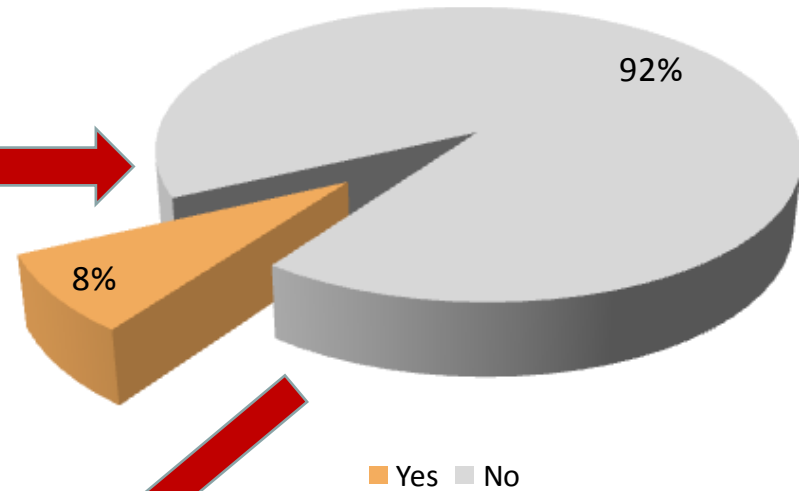
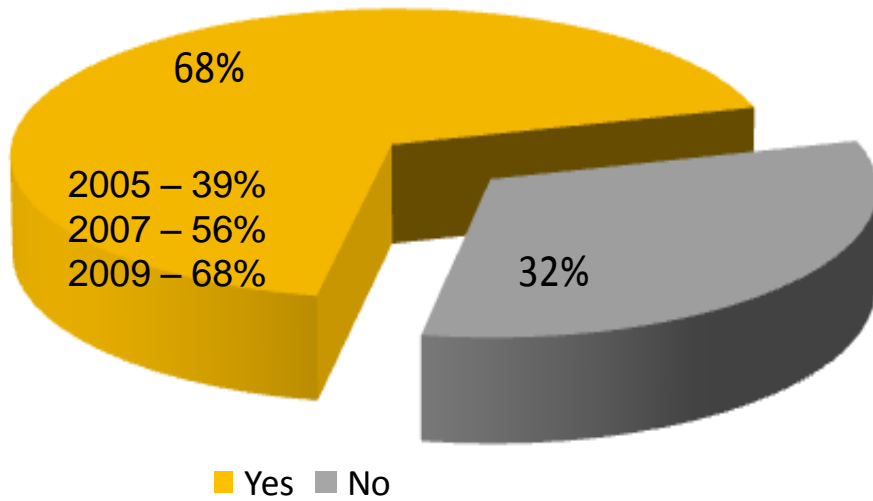
# Internet Access in Maltese Households

*Do you have internet access at home?*

*Sample Size – 801*

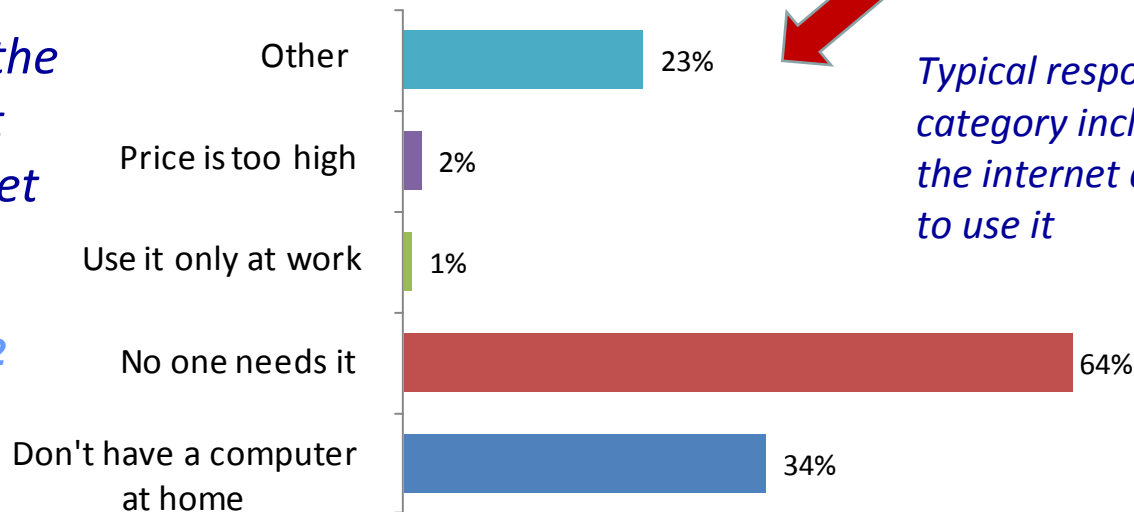
*If no, are you considering getting access to the internet?*

*Sample Size – 253*



*If no, what is the reason for not getting internet access?*

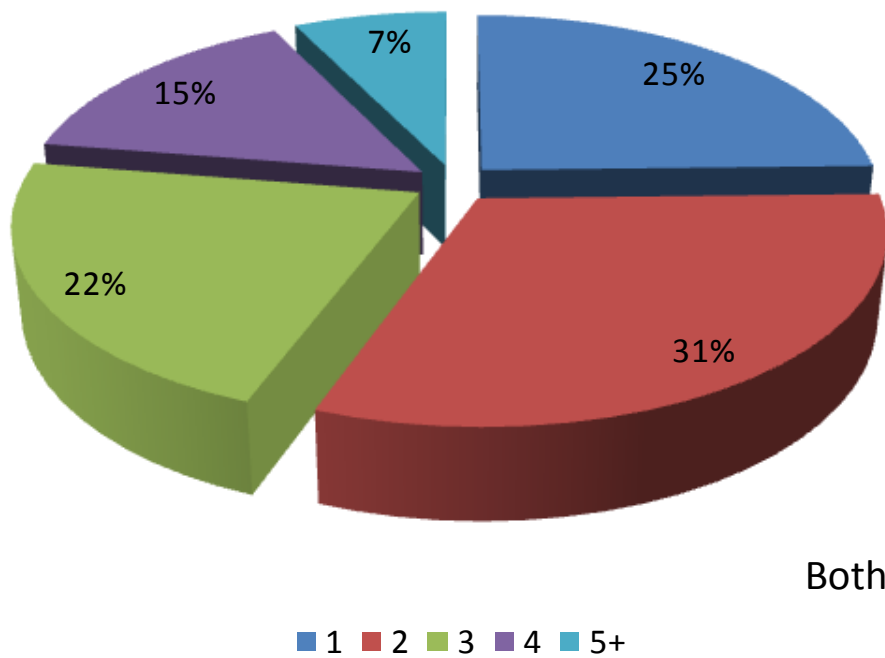
*Sample Size – 232 (each respondent could give more than one reason)*



*Typical responses for the **Other** category included: too old to use the internet and do not know how to use it*

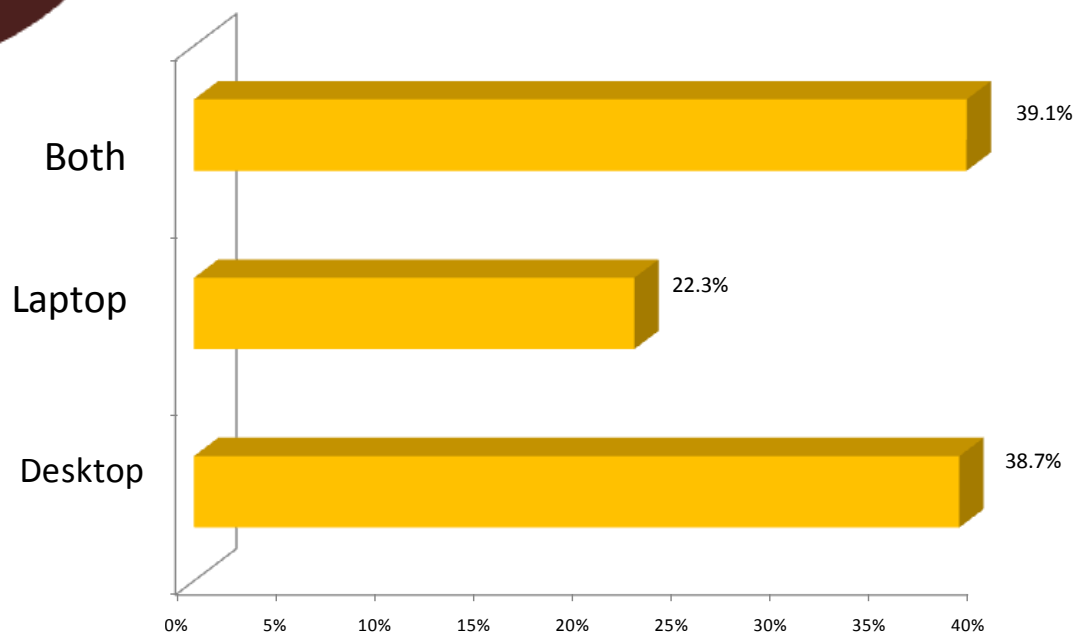
# Computer Access in Maltese Households

*Number of household members using the internet at home*



**Sample Size – 548**

*Type of computer used at home*

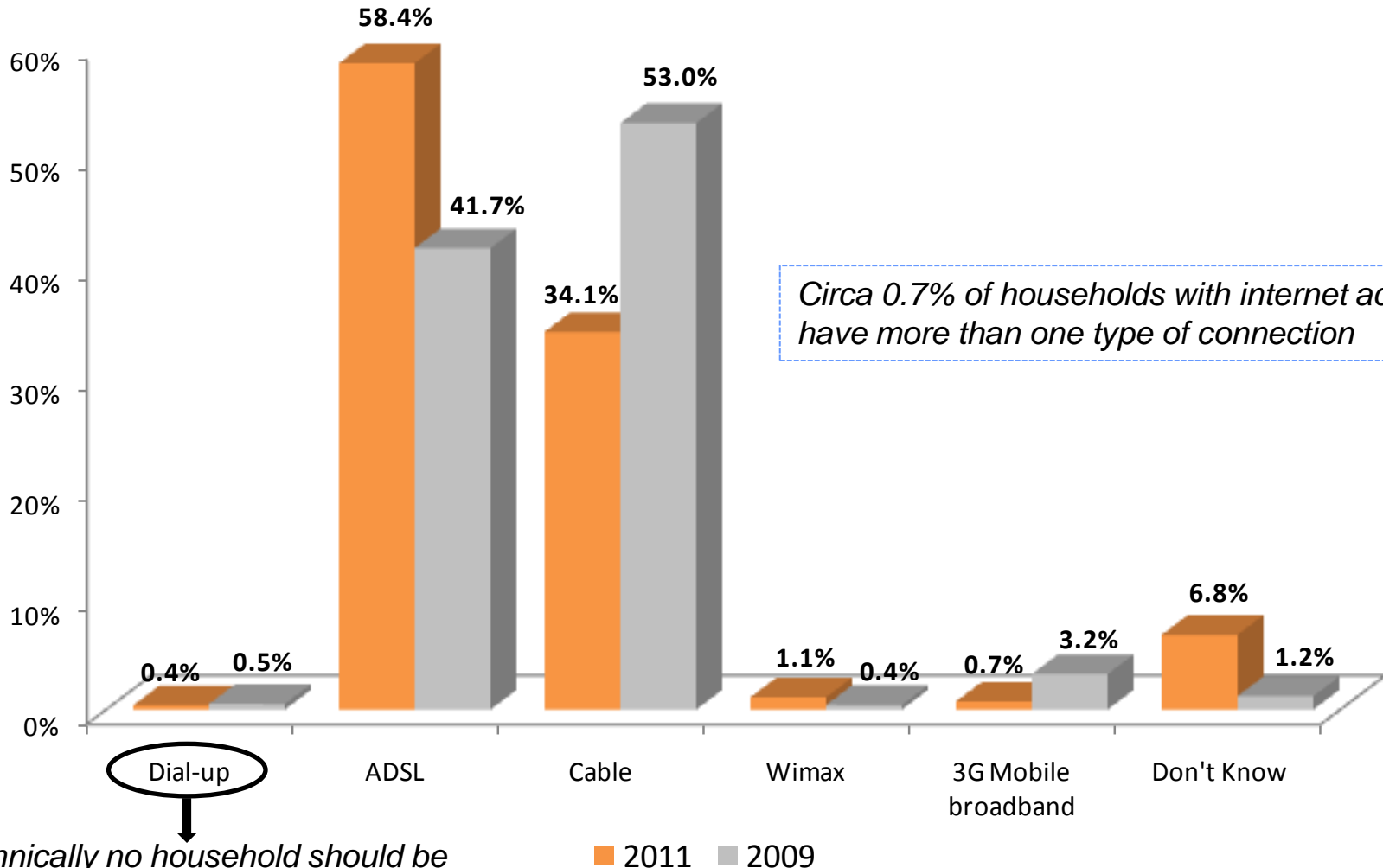




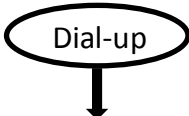
### **3. Type of Internet Connection in Households**

# Type of Internet Connection

Sample Size – 548



*Circa 0.7% of households with internet access have more than one type of connection*



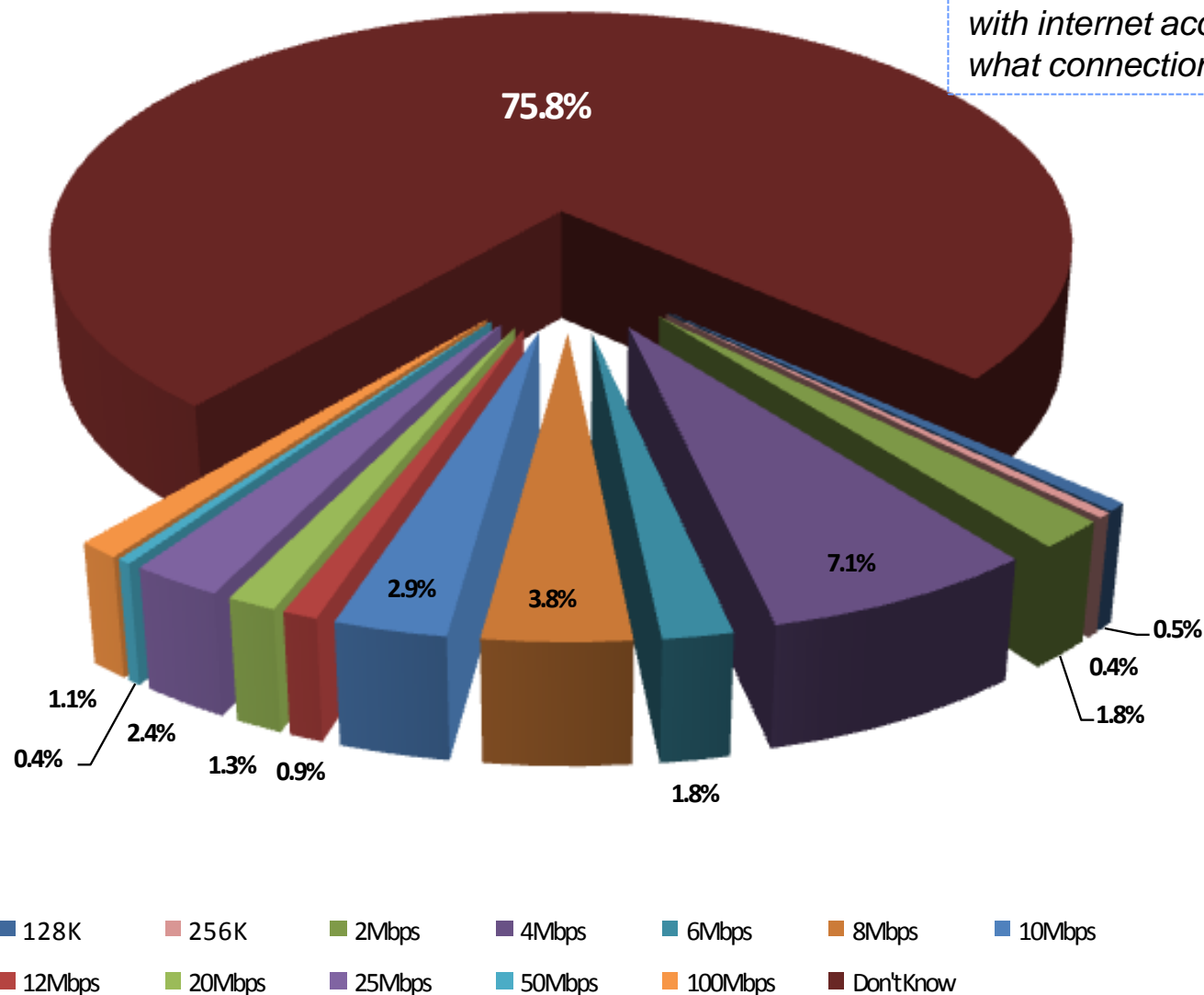
*Technically no household should be reporting dial-up connections as they have all been discontinued*

■ 2011 ■ 2009

# Speed of Internet Connection (1)

Sample Size – 546

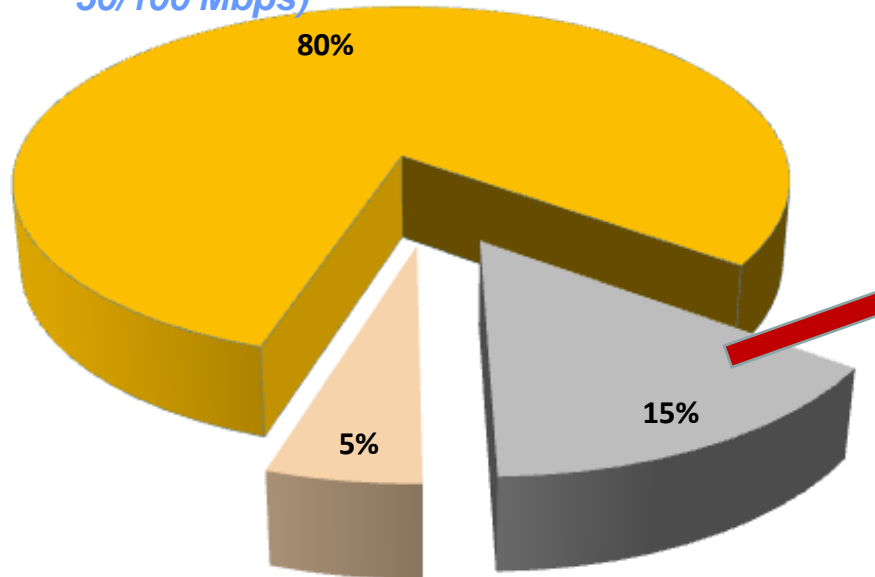
More than 75% of households with internet access do not know what connection speed they have



## Speed of Internet Connection (2)

*Do you feel that this download speed is adequate for your needs?*

*Sample Size – 540  
(excluding respondents with 50/100 Mbps)*

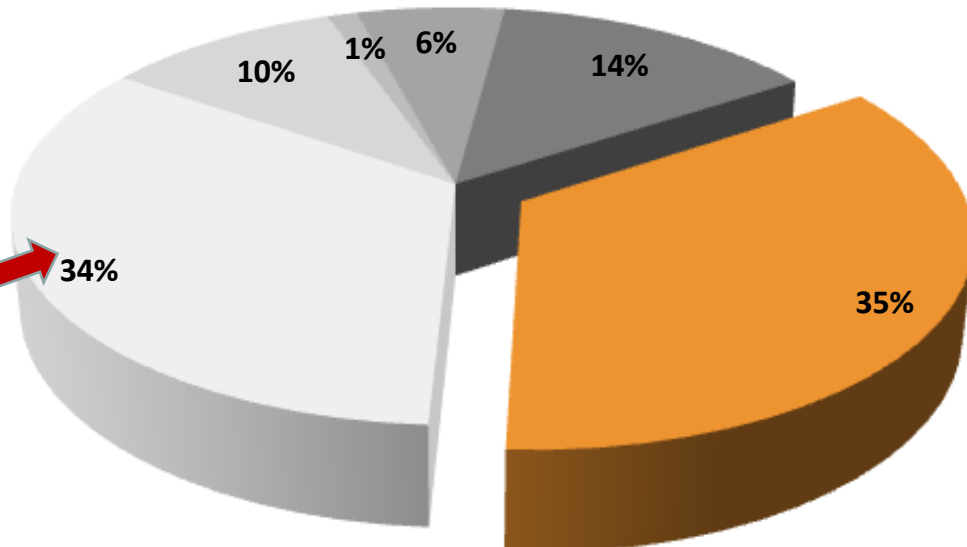


■ Yes, more than enough   ■ Yes, adequate   ■ No, inadequate

*Despite the majority of households not knowing what type of internet speed they have, 85% think it is adequate for their needs.*

*If no, do you consider upgrading to a higher internet speed?*

*Sample Size – 80*

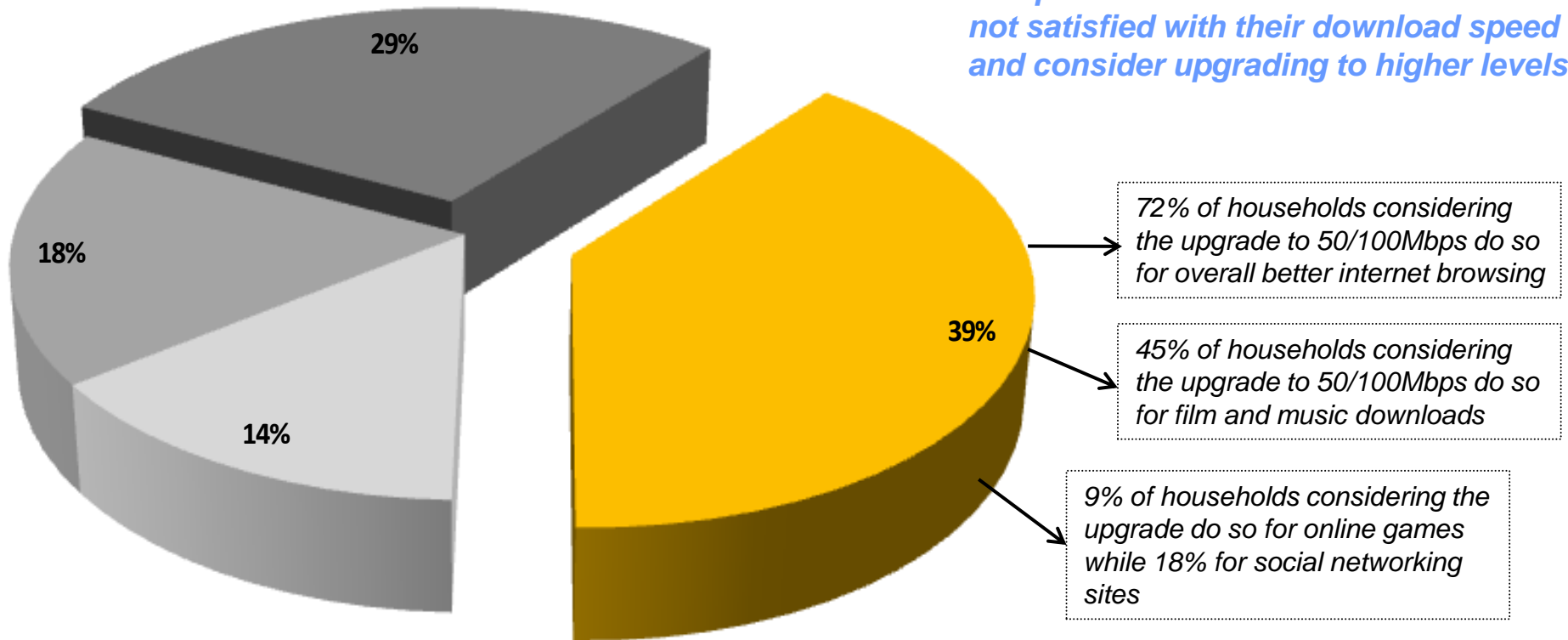


■ Yes  
 ■ No, Price is too expensive  
 ■ No, actual speed used is lower than that being advertised  
 ■ No, not enough information  
 ■ No, line does not support higher speeds  
 ■ Don't know

# Speed of Internet Connection (3)

*If you consider upgrading to higher speed levels, do you consider 50/100 Mbps?*

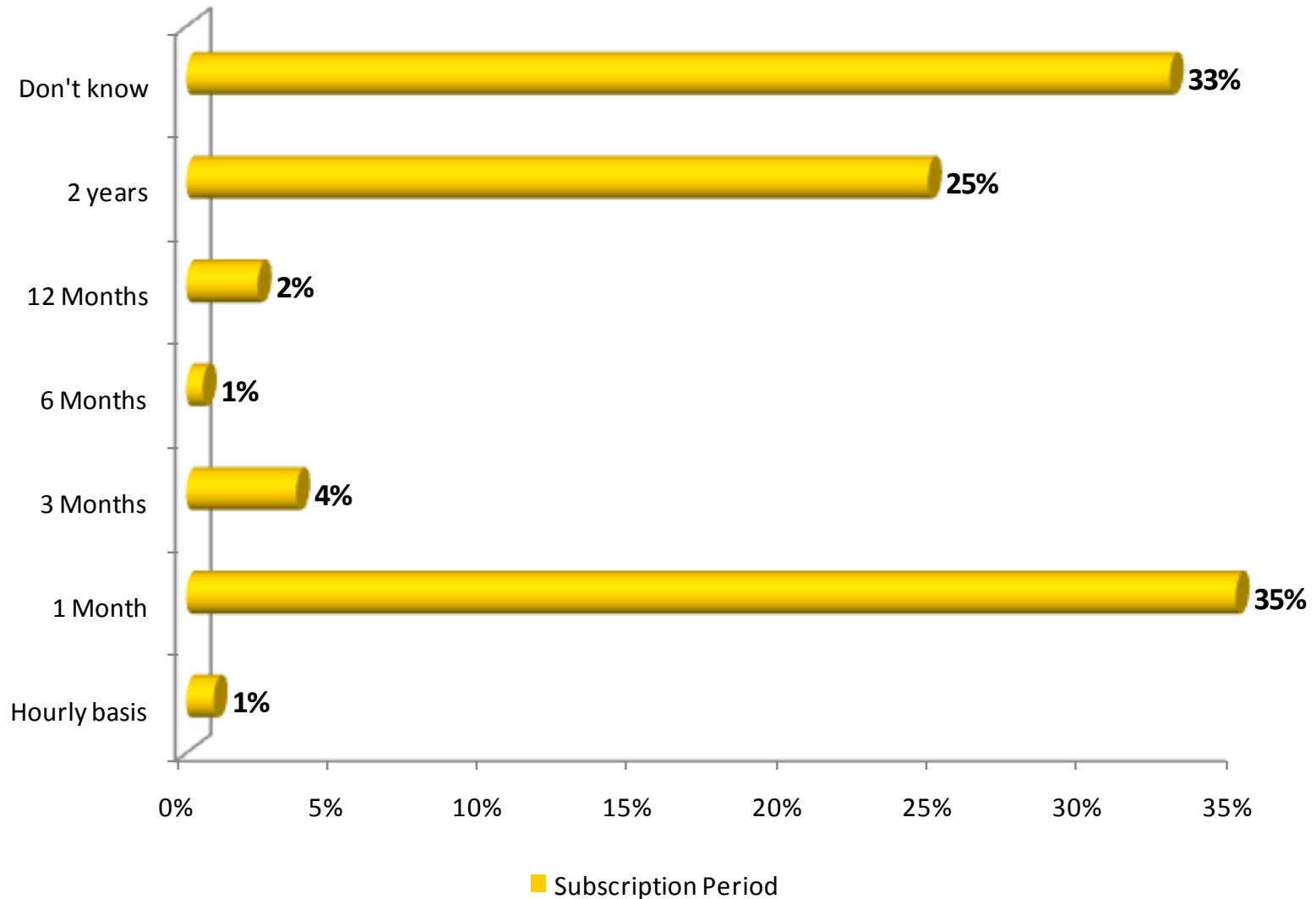
*Sample Size – 28: households that are not satisfied with their download speed and consider upgrading to higher levels*



■ Yes    ■ No, Price is too expensive    ■ No, Don't need this level of speed    ■ Don't know

# Broadband Subscription Period

**Sample Size – 546**

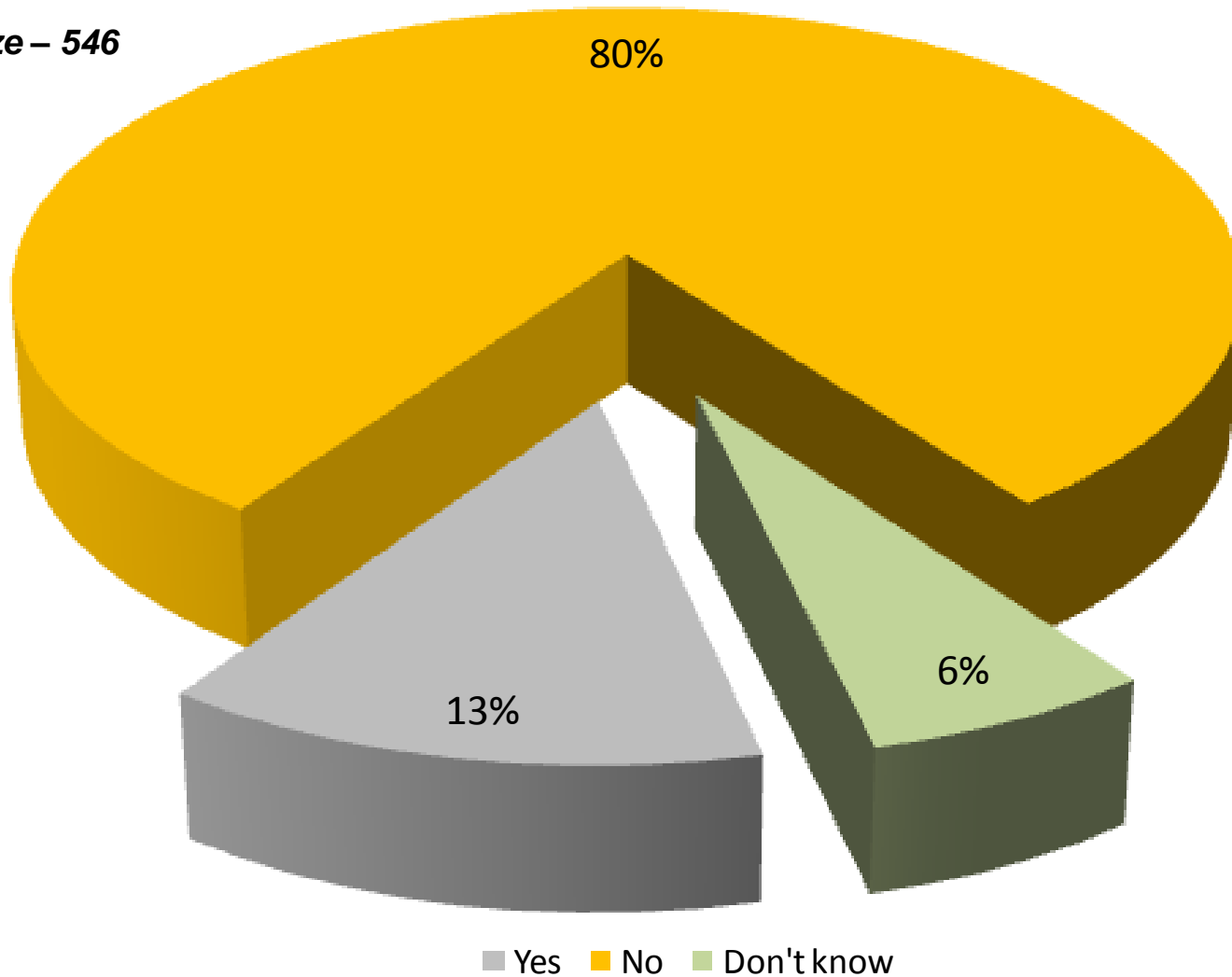


## 4. Analysis on Internet Services in Malta

# Movements in Internet Subscriptions (1)

*Did you switch from one internet service to another over the last two years?*

**Sample Size – 546**





# Movements in Internet Subscriptions (2)

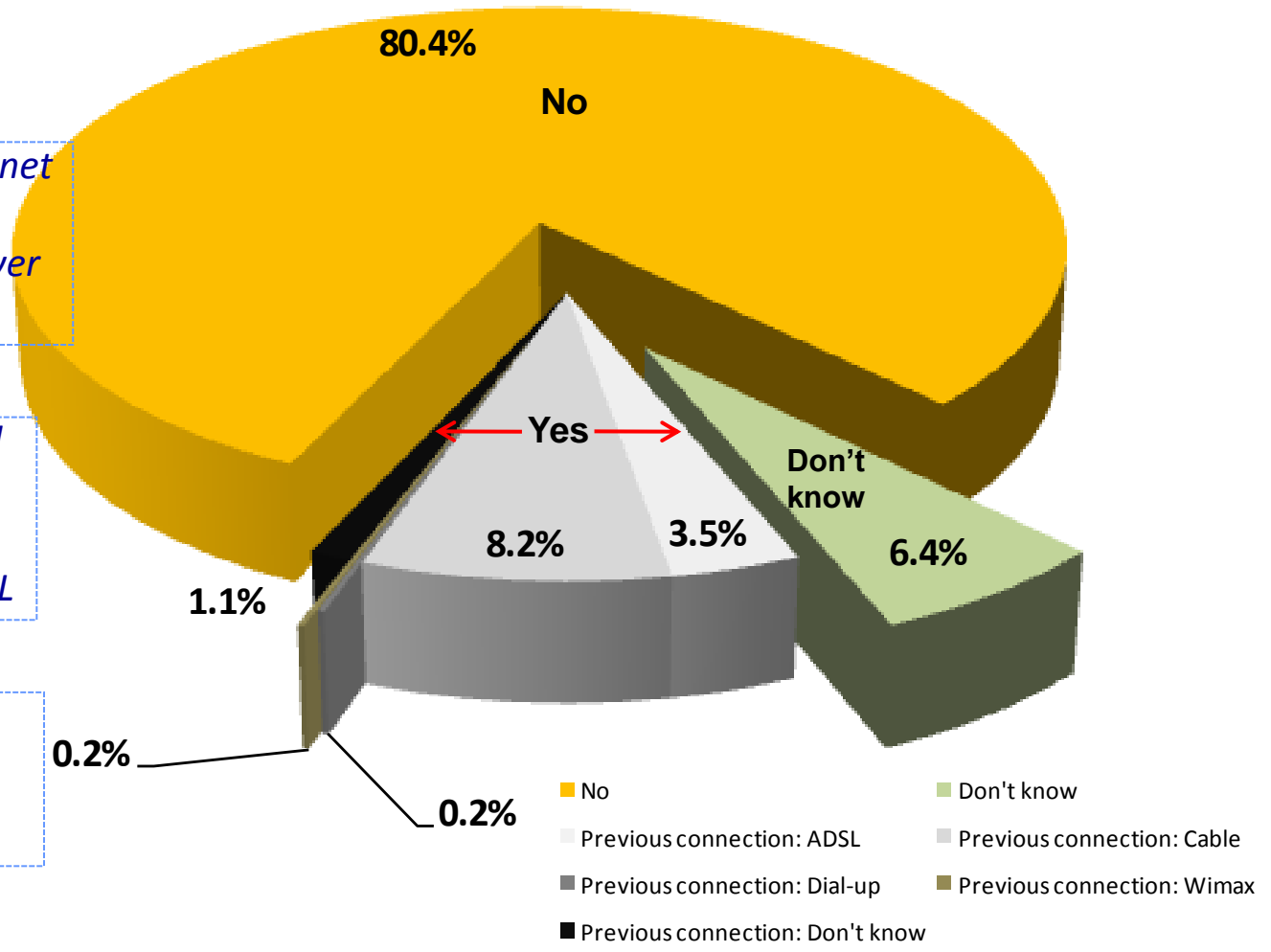
*Did you switch from one internet service to another over the last two years?*

**Sample Size – 546**

13% of households with internet access switched from one internet service to another over the last two years

8.2% of households switched away from cable internet. The vast majority of these subscribers switched to ADSL

ADSL lost 3.5%; mostly to cable internet and partly Wimax solutions



# Ease of Switching between Internet Services

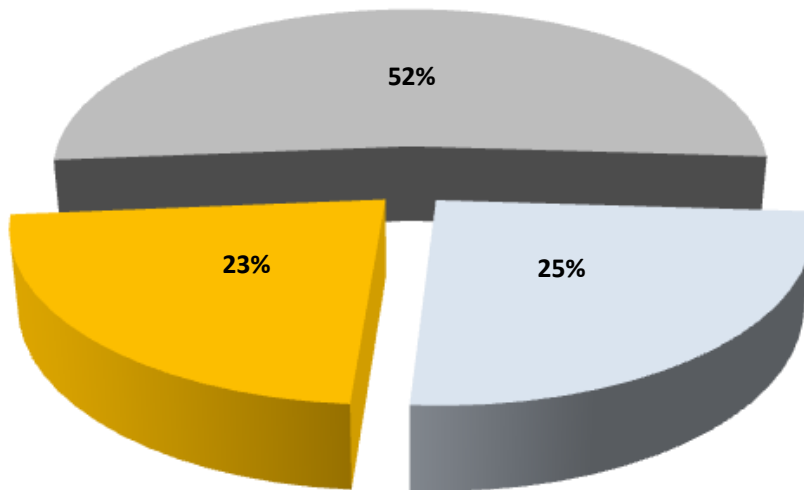
*Do you think it is difficult to switch from one internet service to another?*



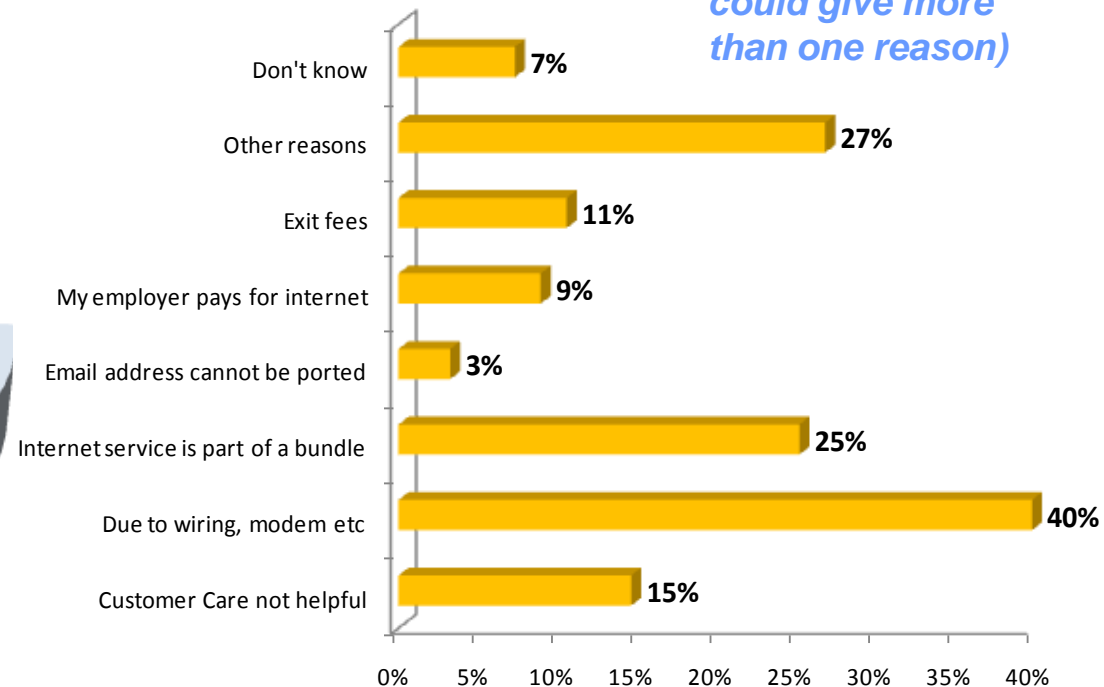
*If yes, why?*

Sample Size – 546

Sample Size – 123  
(each respondent could give more than one reason)



■ Yes ■ No ■ Don't know



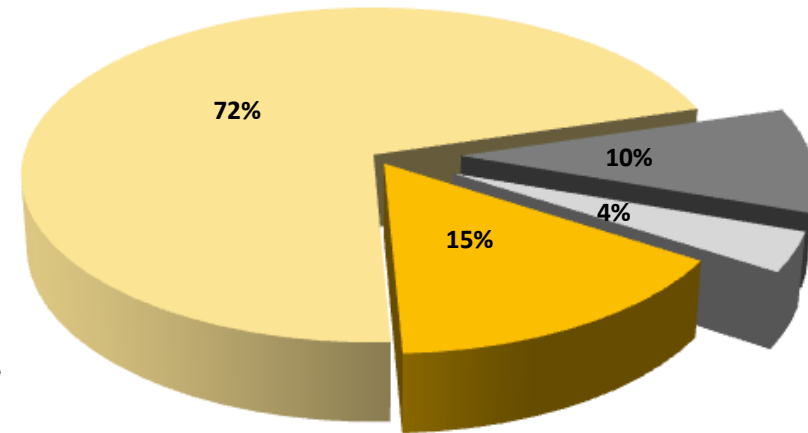
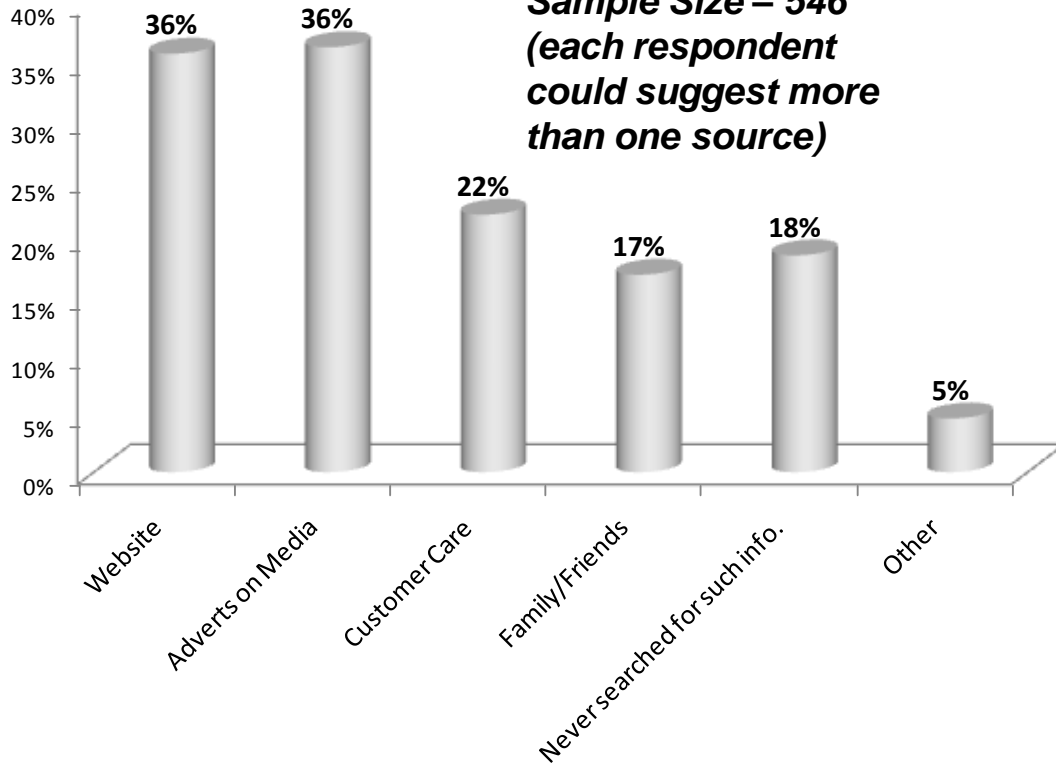
*Most of those who said they had other reasons to believe switching is difficult complained that the process is too bureaucratic, with some even continuing to receive bills despite switching service*

# Sources of Information on Internet Services

*Where do you usually get the information on internet services & related prices?*

*How easy is it to understand and choose a specific internet service from your preferred source?*

**Sample Size – 546  
(each respondent could suggest more than one source)**



**Sample Size – 445: excl. those who never searched for such info.**

■ Very Easy ■ Easy ■ Difficult ■ Not useful

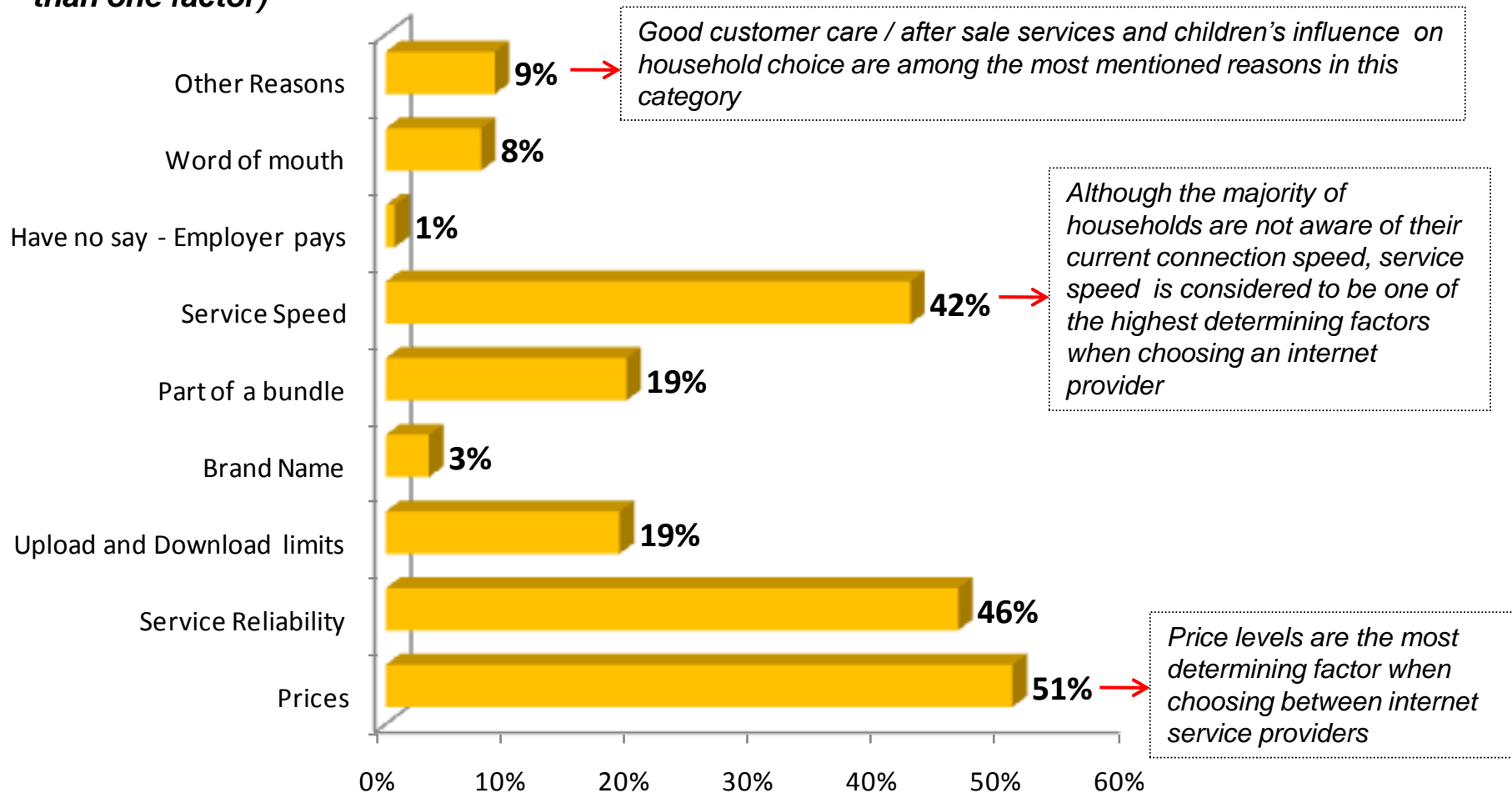
*More than 91% of households who received info. via the website found it very easy / easy*

*19% of info. channelled via media adverts was found to be difficult or not useful*

*Only 13% of info. sought via customer care was found to be difficult or not useful*

# Factors that influence Households when choosing an Internet Service Provider

**Sample Size – 546**  
**(each respondent could suggest more than one factor)**



# Internet Quality of Service Satisfaction (1)

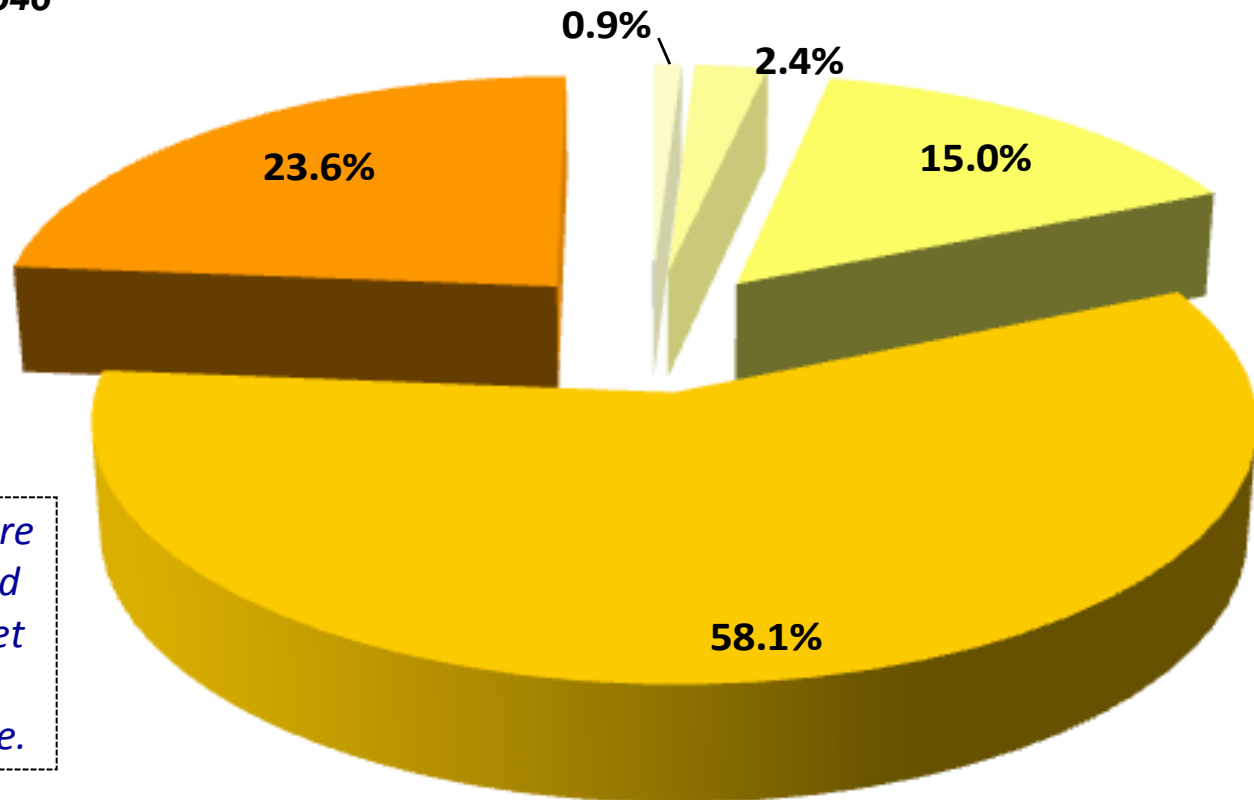
*How satisfied are you with the quality of your internet connection?*

**Sample Size – 546**

*More than 82% of households with internet access are satisfied or highly satisfied with the level of service.*

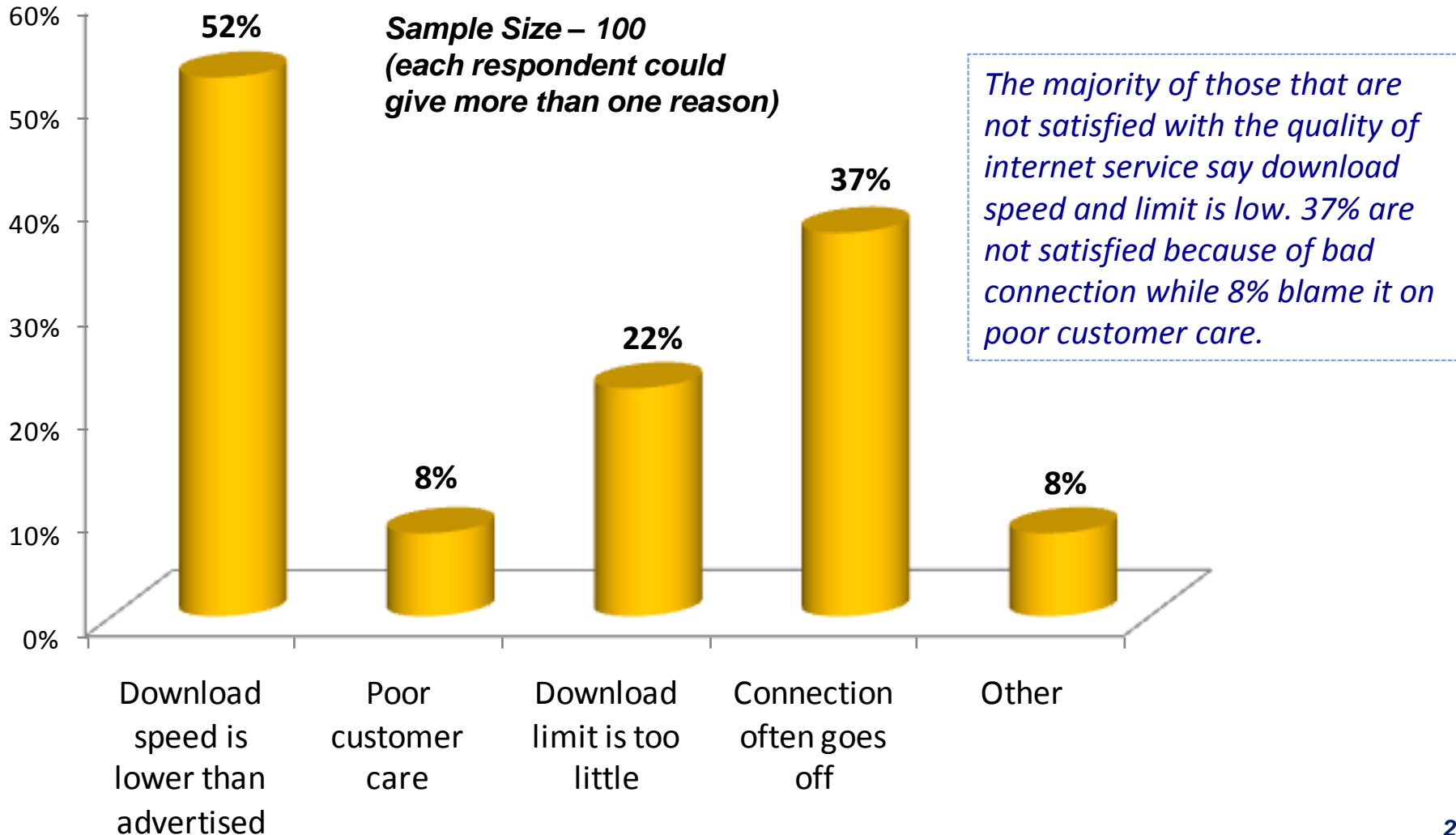


*57% of households that are satisfied or highly satisfied with the quality of internet services are ADSL subscribers. 36% are cable.*



## Internet Quality of Service Satisfaction (2)

*If you are not satisfied with the quality of your internet connection, why is it so?*



## 5. Pricing Analysis

# Pricing Analysis (1)

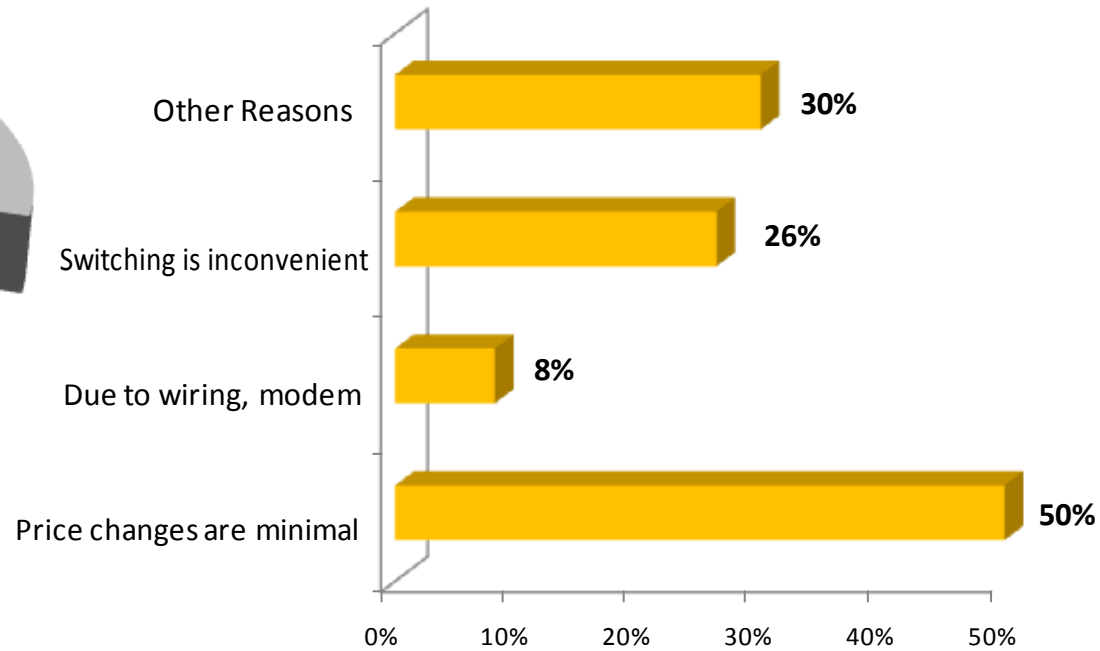
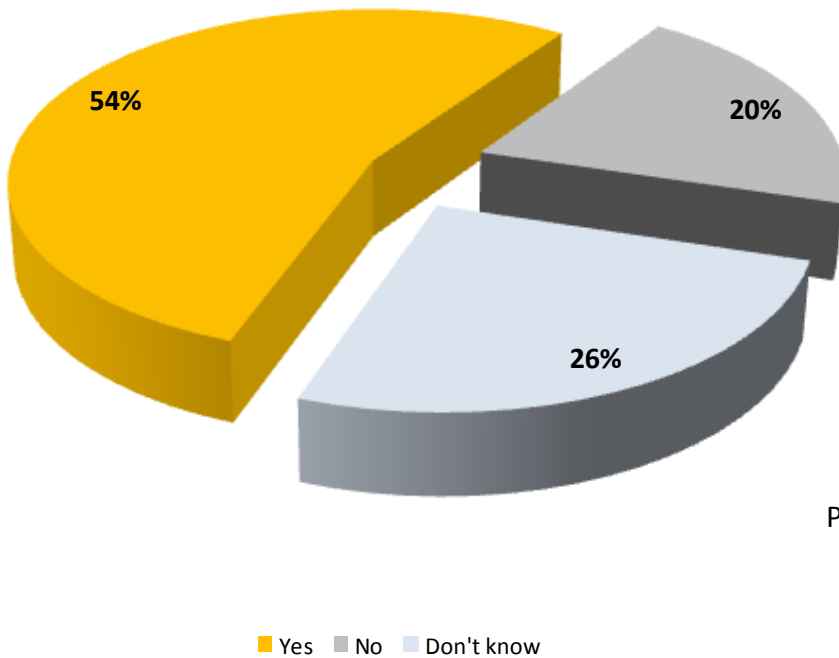
*If the subscription charges increase by 10% on a monthly basis, would you change your internet connection?*

*Sample Size – 546*



*If no, why?*

*Sample Size – 110  
(each respondent could give more than one reason)*





## Pricing Analysis (2)

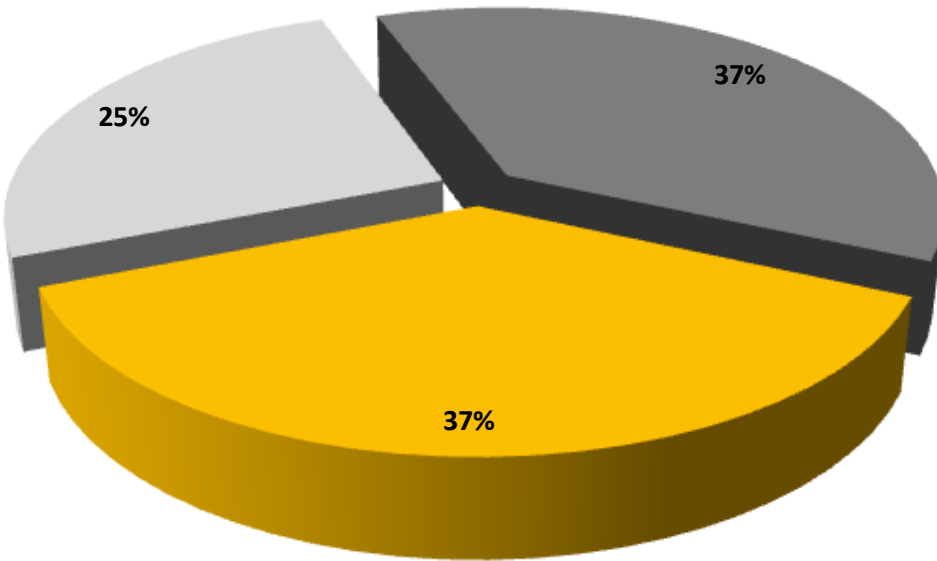
*Are you aware of the price you are paying for your broadband subscription?*



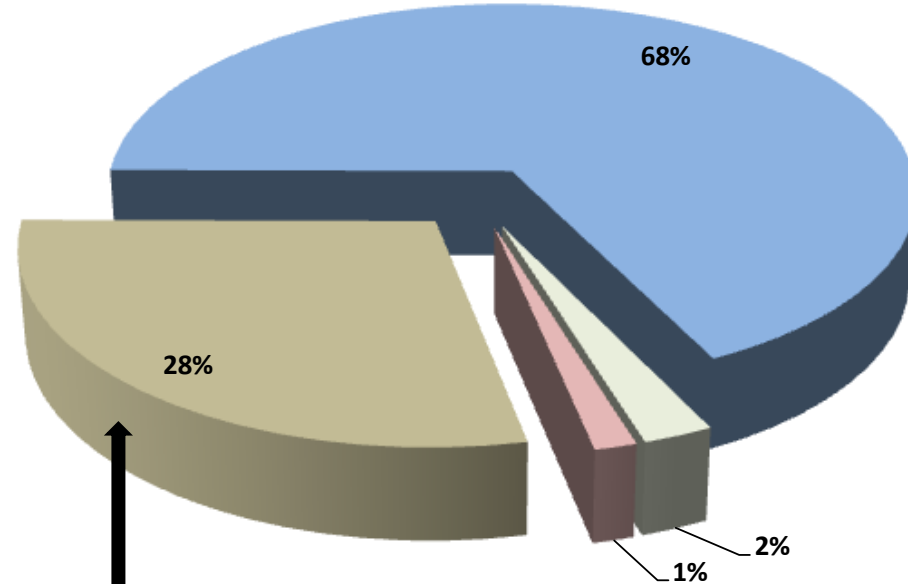
*If yes, do you consider the price you pay ...*

Sample Size – 546

Sample Size – 204



■ Yes   ■ No, not aware   ■ No, it's part of the bundle cost

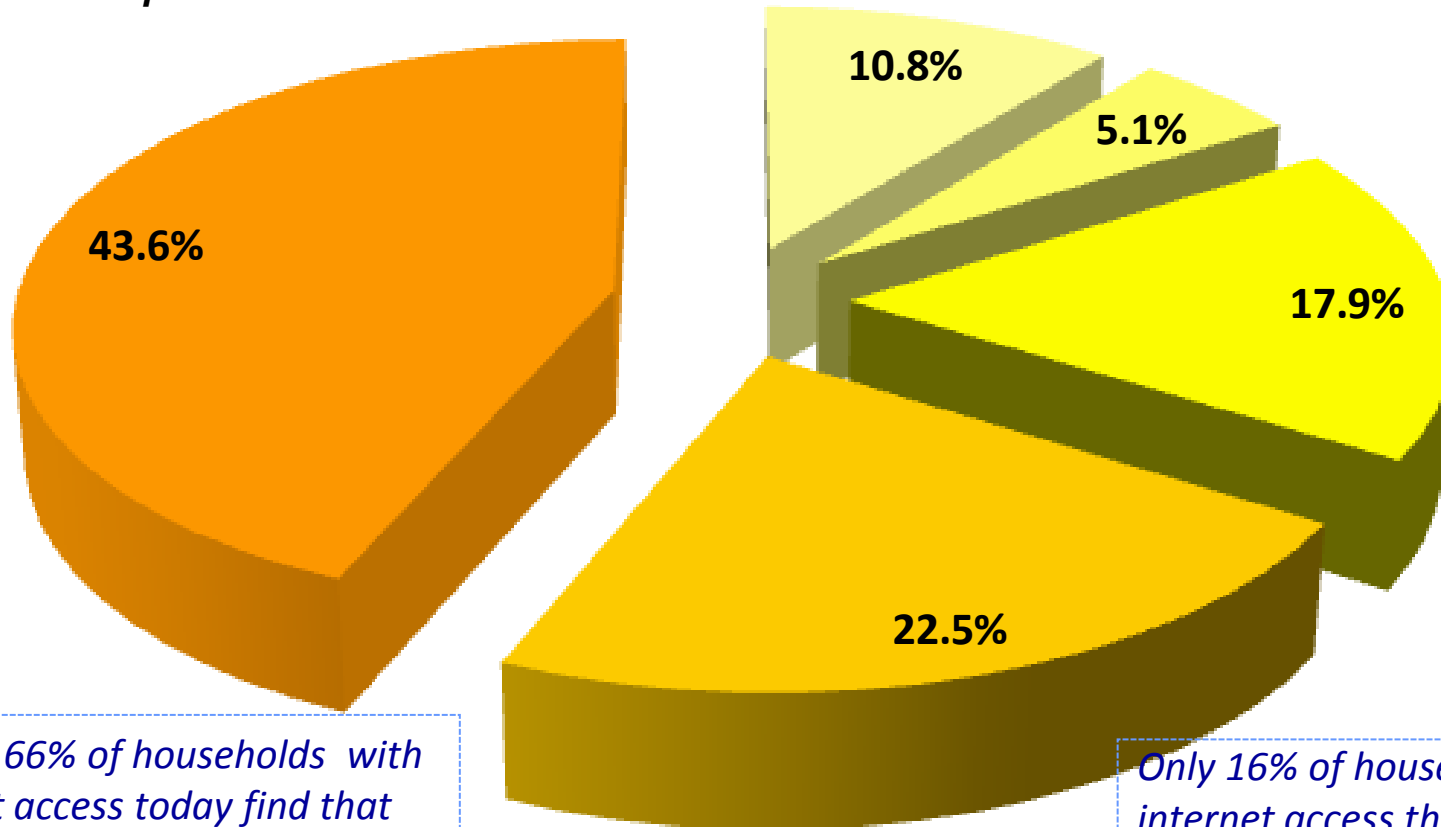


■ Expensive   ■ Reasonable   ■ Cheap   ■ Don't know

*53% of households who claim internet service is expensive are cable subscribers while 40% are ADSL.*

# How important is the internet in ones life?

Sample Size – 546



*Around 66% of households with internet access today find that they cannot live without it*

*Only 16% of households with internet access think they don't need it; possibly reflecting the respondent's view rather than that of the general household*



Don't need it → Cannot live without it



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