

MCA Market Research

Consumer Perception Survey Results – Mobile

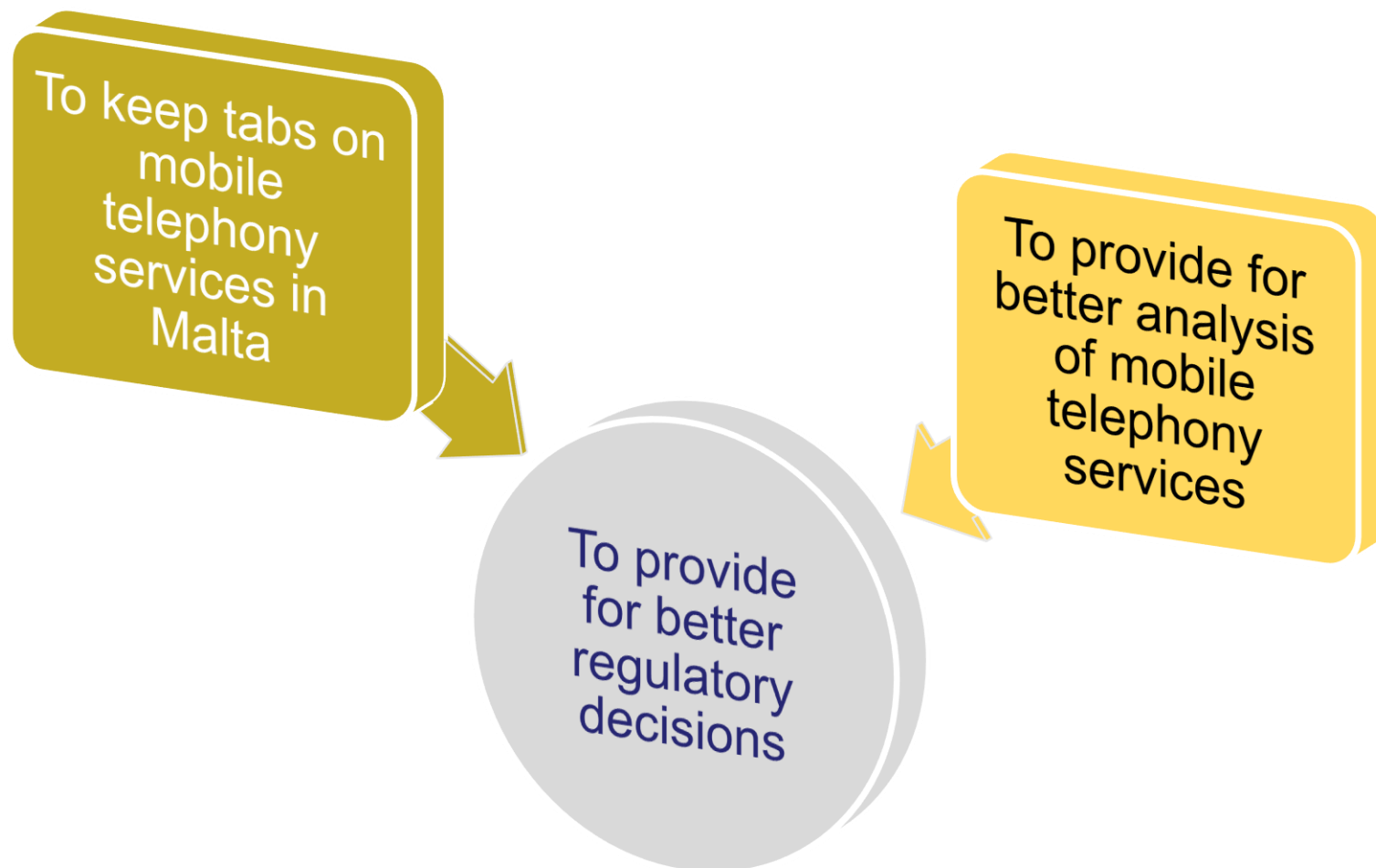
Malta Communications Authority
October 2011

Presentation Structure

1. Purpose and methodology
2. Mobile telephone access in Malta
3. Pricing & substitution analysis
4. Internet access via mobile telephone
5. Quality satisfaction index & market development

1. Purpose & Methodology

Purpose



M. Fsadni & Associates carried out the survey in August 2011 on behalf of the MCA

Fieldwork

Interviews were carried out by telephone using CATI, lasting around 10 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

804 net respondents

Any refusals / incomplete surveys were re-allocated to achieve a net sample of 800 interviewees.

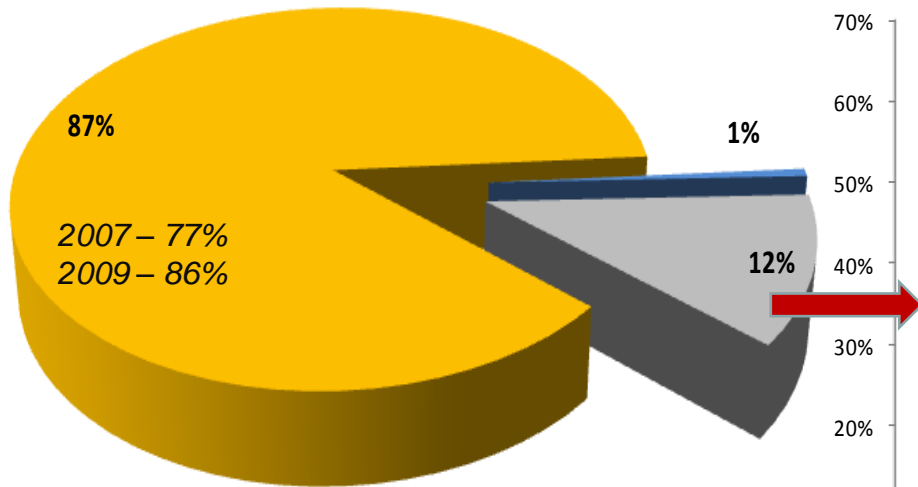
Margin of error 3.45% at 95% confidence interval.

2. Mobile Telephone Access in Malta

Mobile Telephone Access

Do you have a mobile phone?

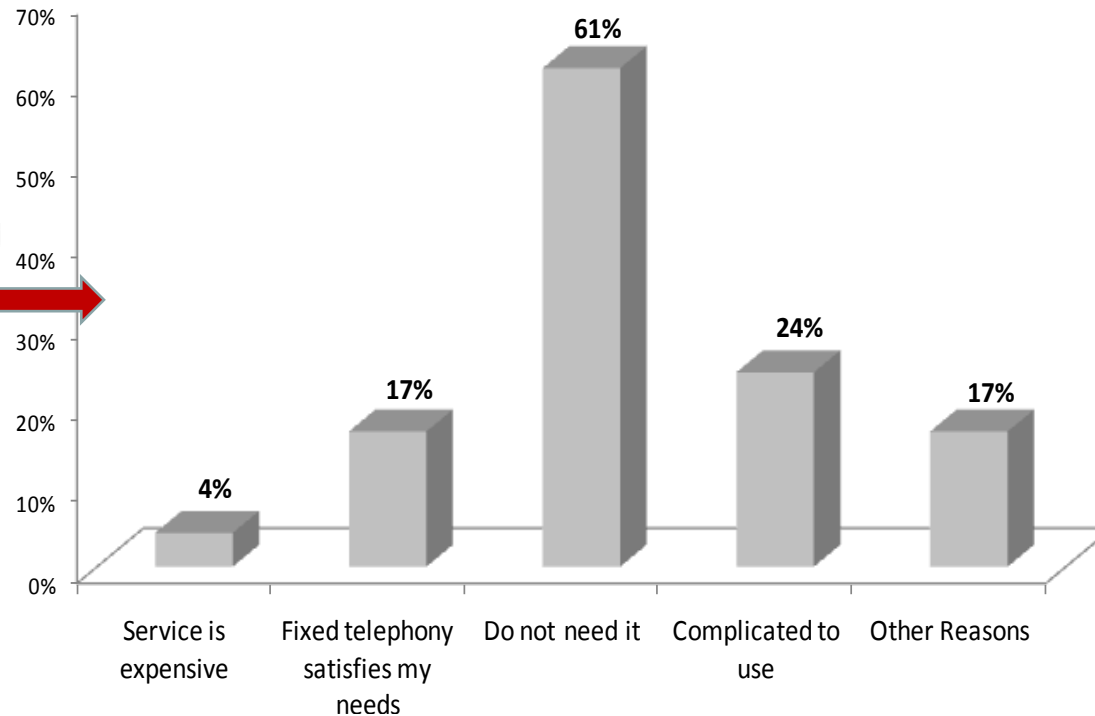
Sample Size – 804



- Yes
- No, but intend to get one by the end of the year
- No, and do not intend to get one in the future

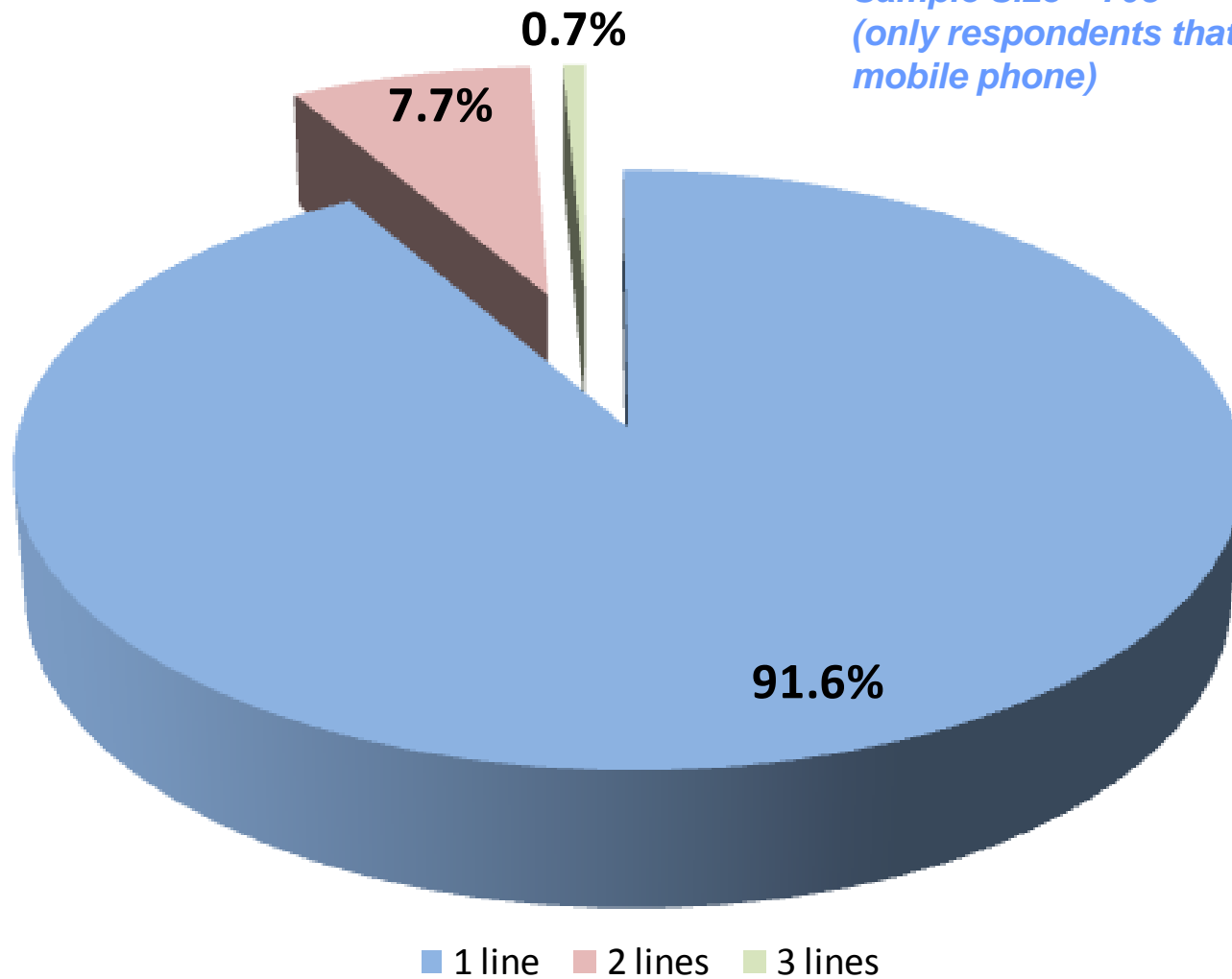
What are the reasons for not getting a mobile phone?

*Sample Size – 96
(each respondent could give more than one reason)*



Number of Mobile Connections

*Sample Size – 703
(only respondents that have a
mobile phone)*

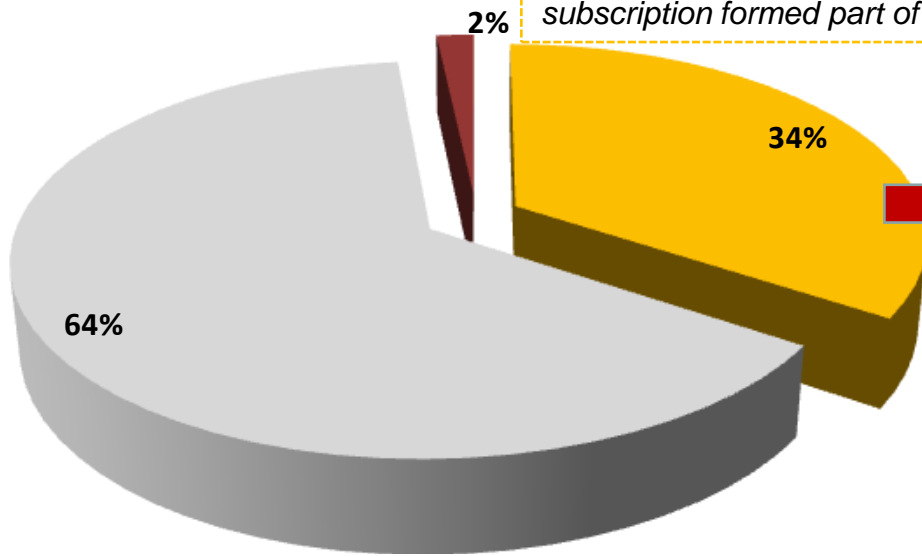


Mobile Telephone Access – Bundle Analysis

Does your mobile subscription form part of a bundle?

Sample Size – 703

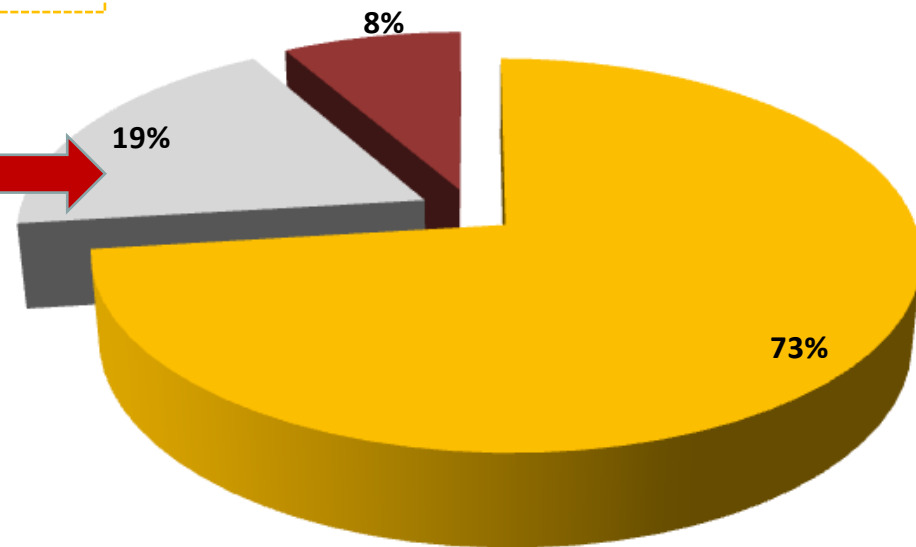
In the 2009 survey, only 7% of respondents claimed that their mobile subscription formed part of a bundle



■ Yes ■ No ■ Don't Know

Do you use the mobile offers that are being offered as part of the bundle?

Sample Size – 241

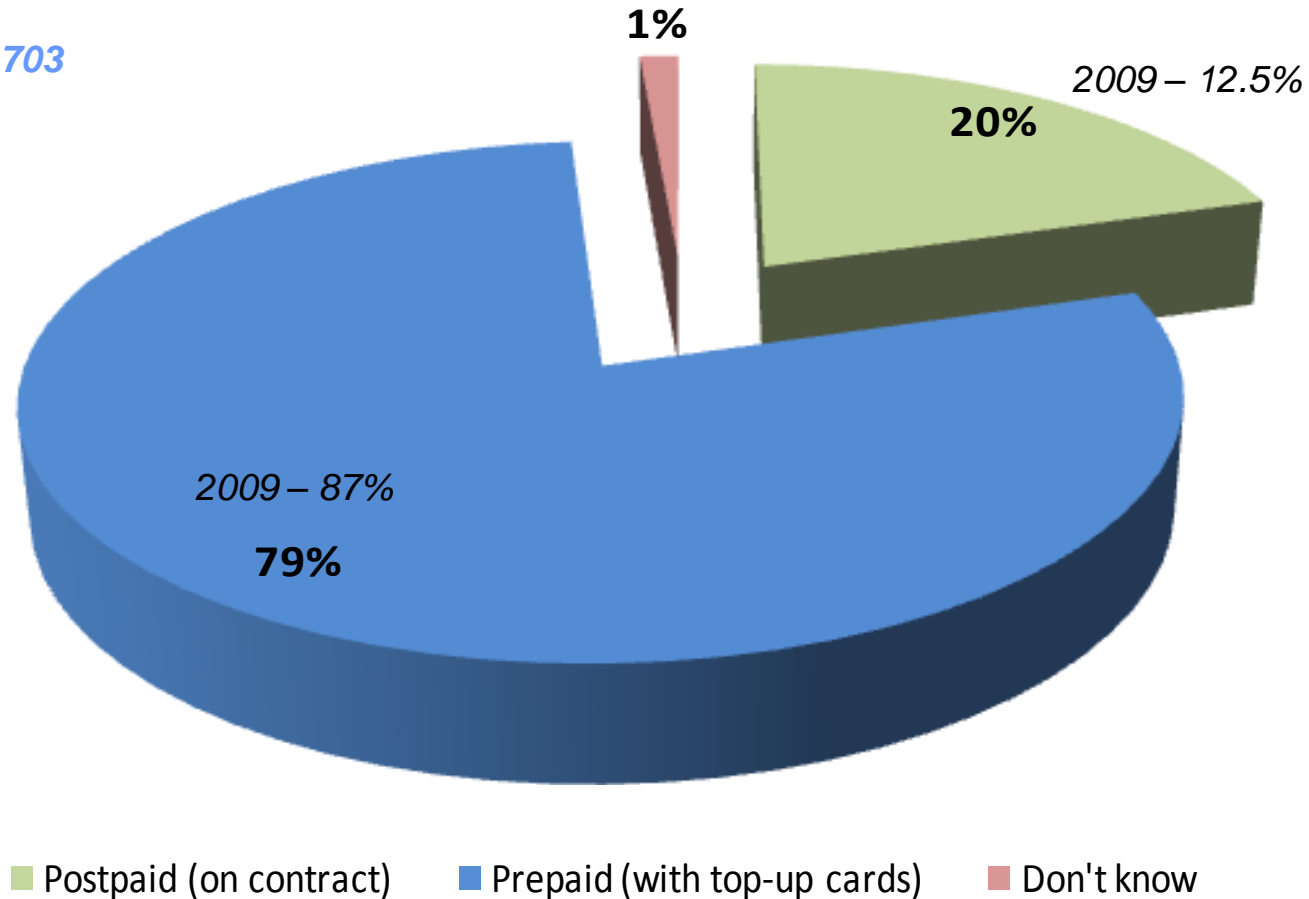


■ Yes ■ No ■ Don't Know

Mobile Telephone Access – Type of Subscription

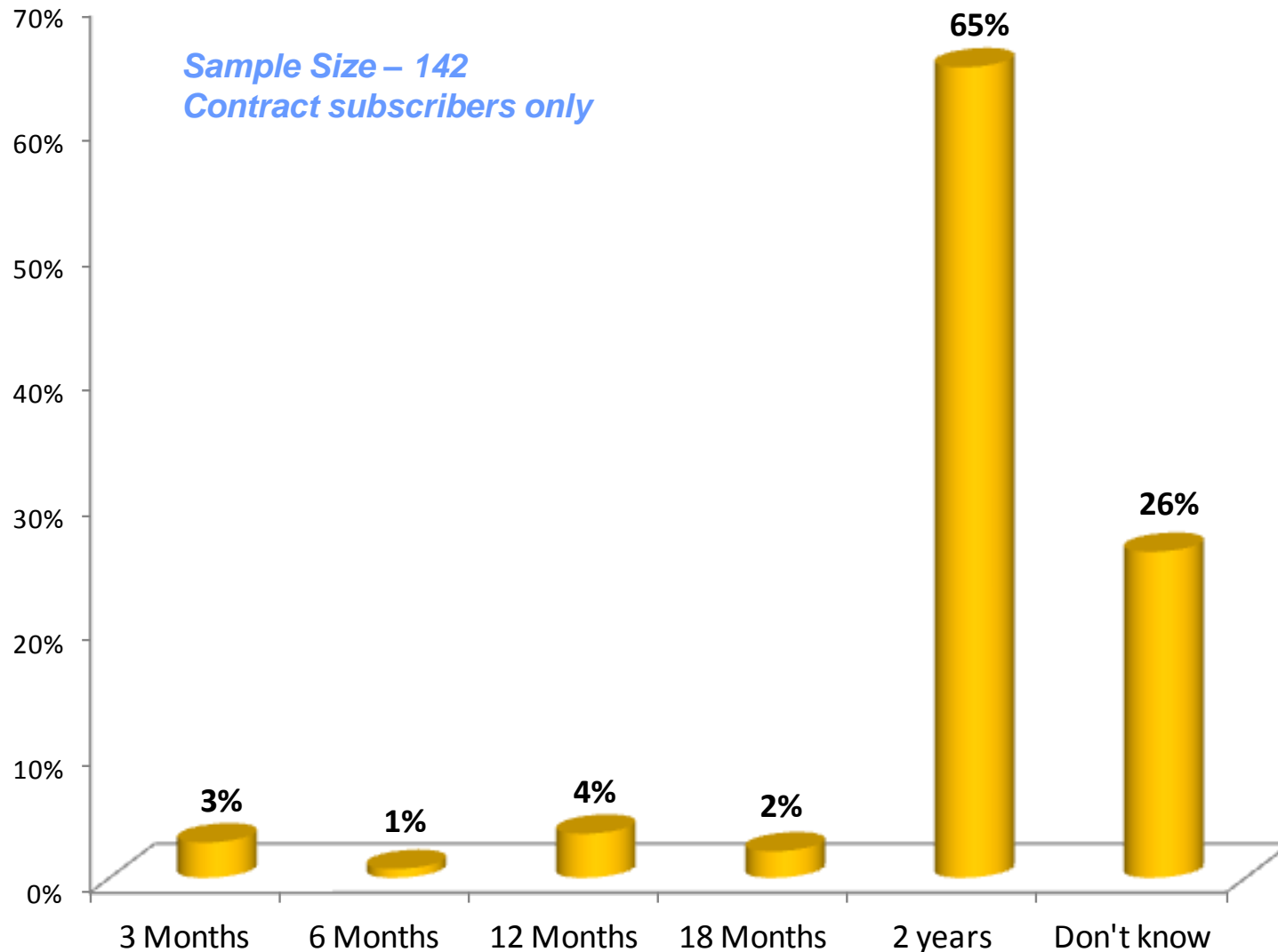
Your mobile subscription (main connection) is based on...

Sample Size – 703



Mobile Telephone Access – Type of Subscription

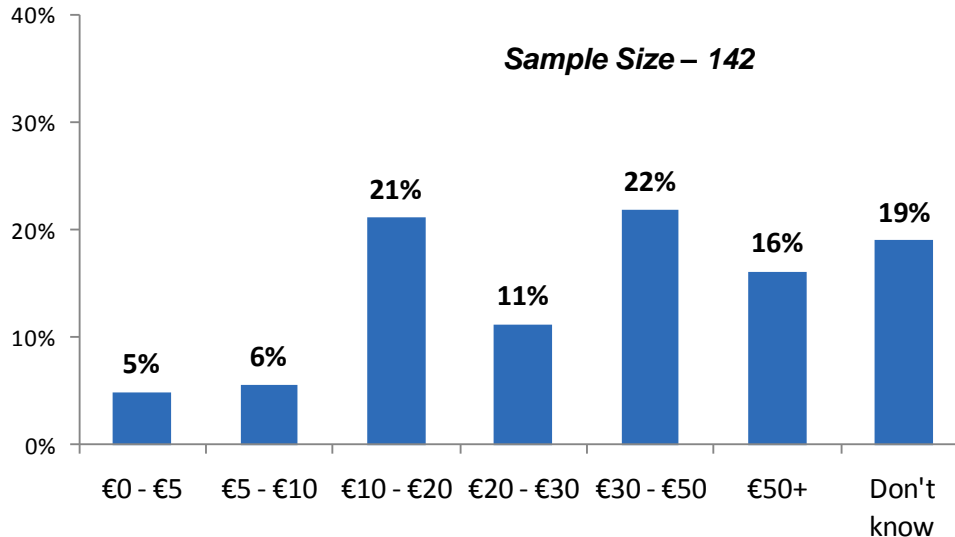
For those that are on contract: how long is the subscription period?



3. Pricing & Substitution Analysis

Mobile Price Analysis – Postpaid vs. Prepaid

POST PAID - *On average, how much do you spend per month on mobile services?*

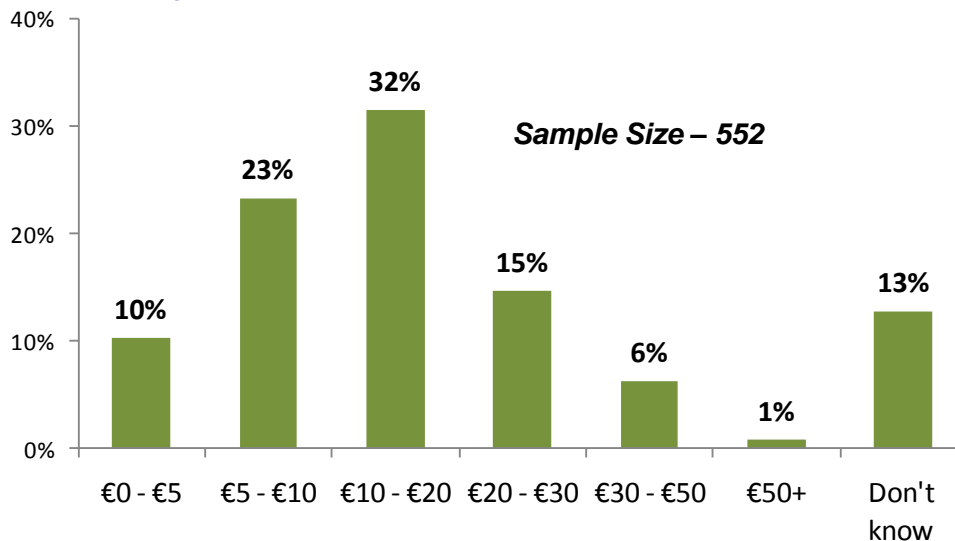


Prepaid subscribers are generally more aware of their monthly mobile expenditure – only 13% don't know how much they spend as opposed to the 19% postpaid subscribers.

The majority of prepaid subscribers fall in the lower spending brackets.

38% of postpaid subscribers spend more than €30 a month on mobile services.

PRE-PAID - *On average, how much do you spend per month on mobile services?*



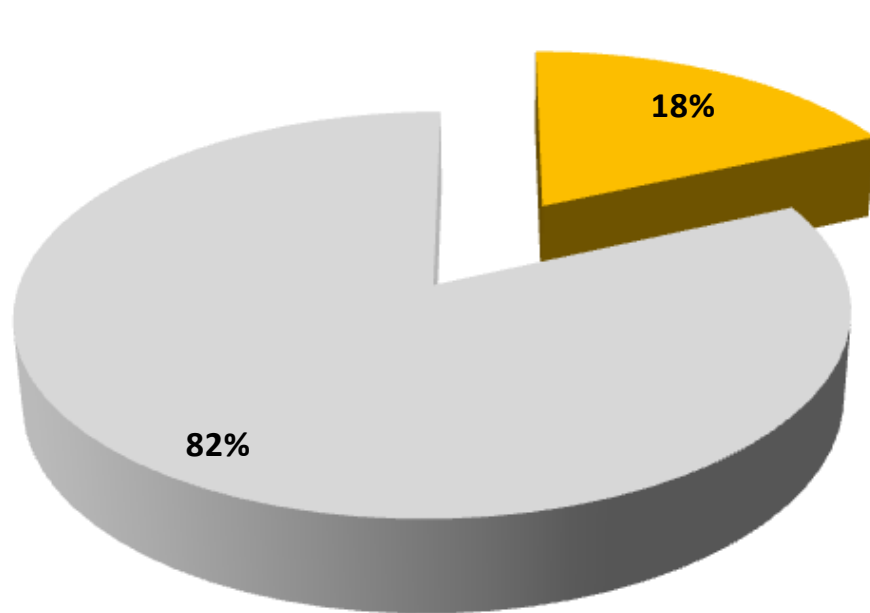
Pricing Analysis

Do you know how much it would cost you to make a one minute call from your mobile?

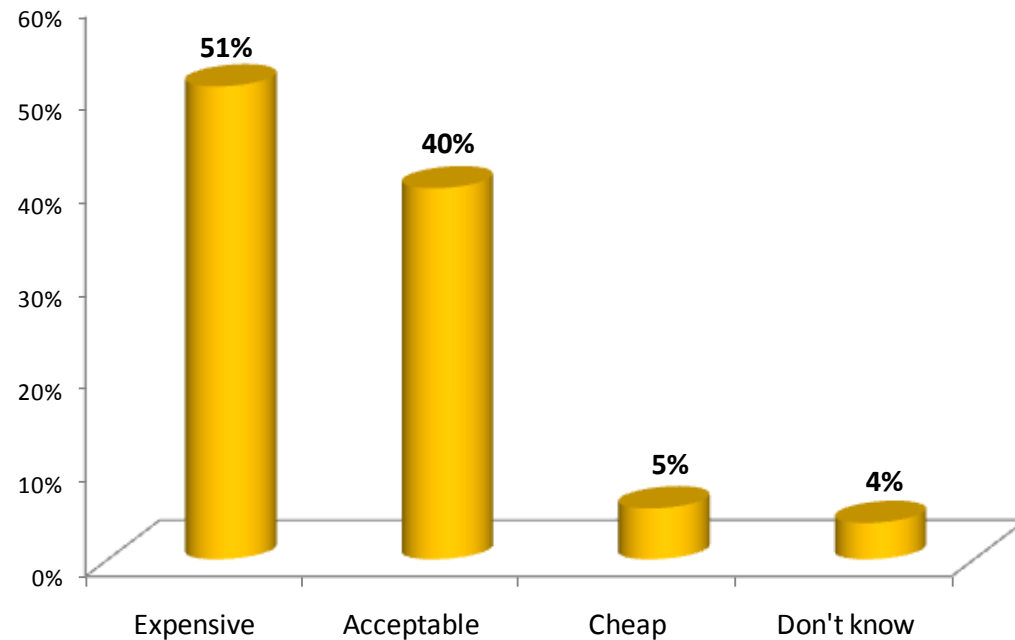
If yes, do you think that mobile call rates are...

Sample Size – 703

Sample Size – 128



■ Yes ■ No



International Roaming

Did you travel abroad during 2010?

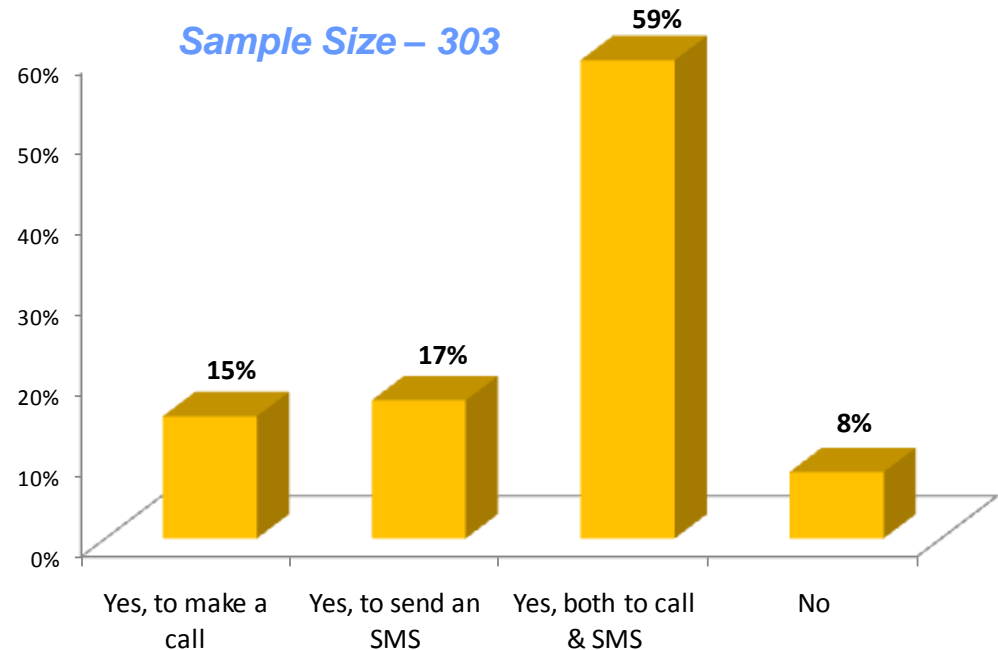
*Did you use your mobile while being abroad?
(referring to the Malta connection)*

Sample Size – 703



■ Yes, up to twice ■ Yes, more than twice ■ No

Sample Size – 303

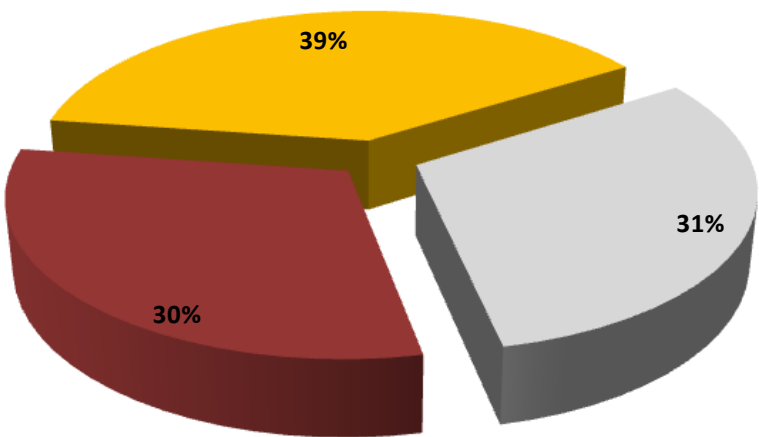


91% of respondents who said they travelled abroad during 2010 also claimed to have used their mobile phone while being abroad.

Churn Analysis (1)

If your current mobile operator raises the rate of a one minute mobile call by 5%-10%, would you switch to another mobile operator?

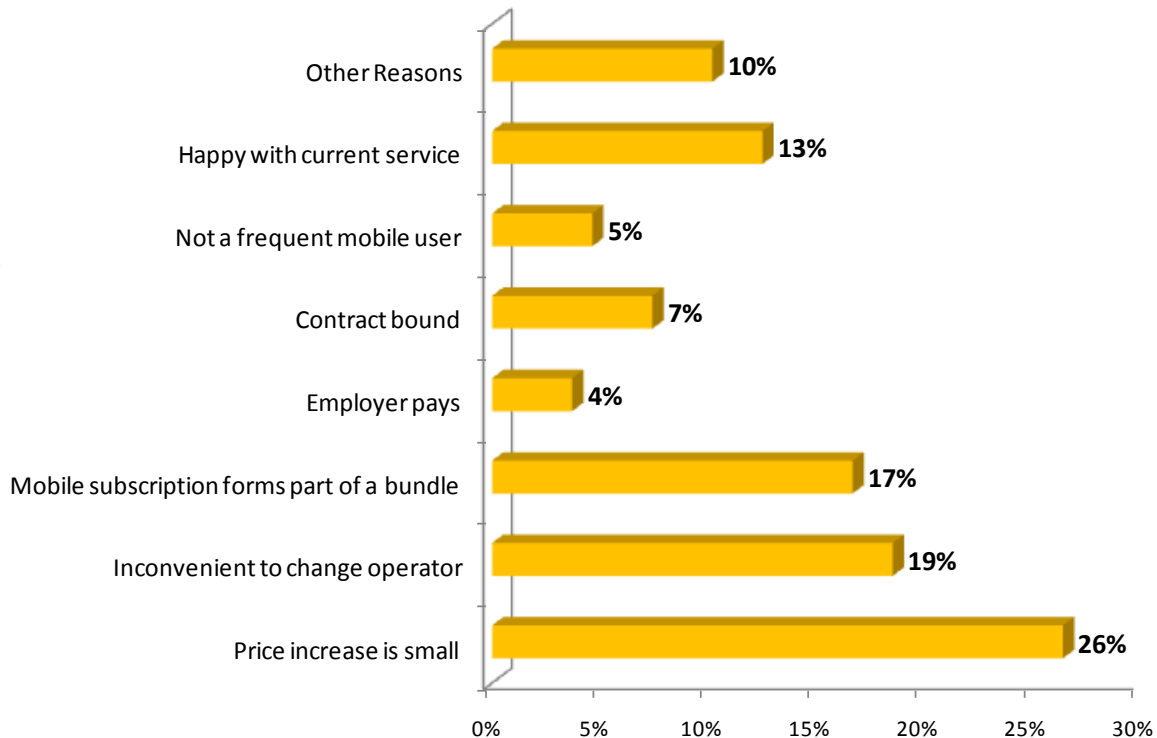
Sample Size – 703



Yes No Don't Know

If no, why?

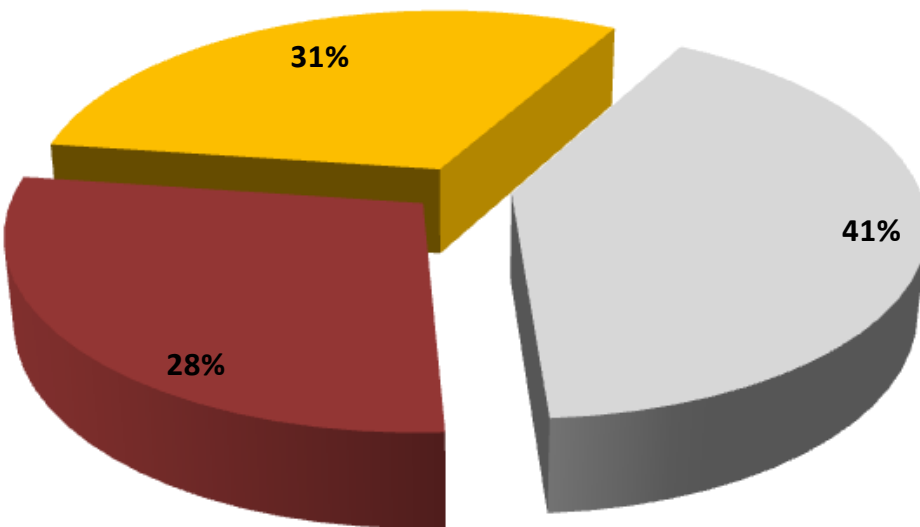
Sample Size – 216



Churn Analysis (2)

If your current mobile operator raises the rate of a one minute mobile call by 5%-10%, would you call less from your mobile phone?

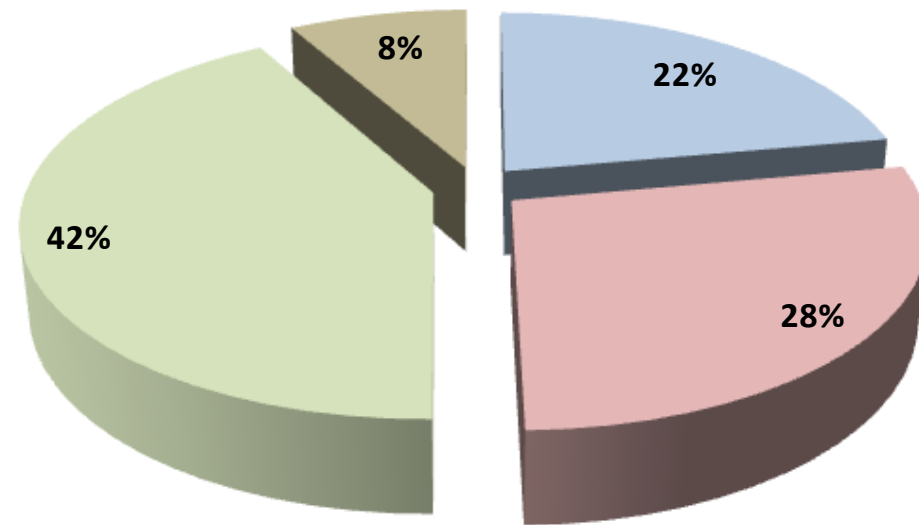
Sample Size – 703



■ Yes ■ No ■ Don't Know

If yes, what do you do instead?

Sample Size – 217



■ Use the fixed line ■ Send an SMS
■ Just call less ■ Other solutions

The majority of those (8%) who said they will resort to other solutions claim that they will simply not use the mobile phone.

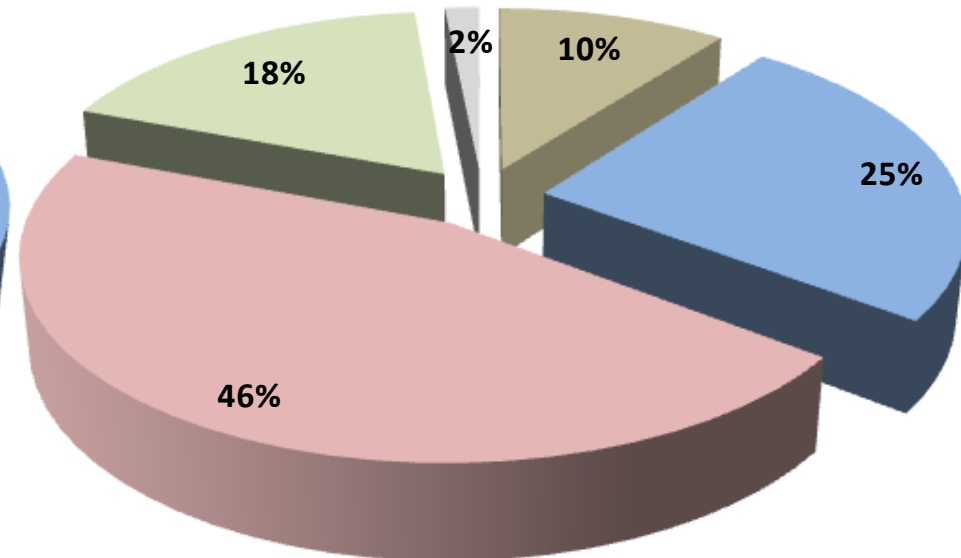
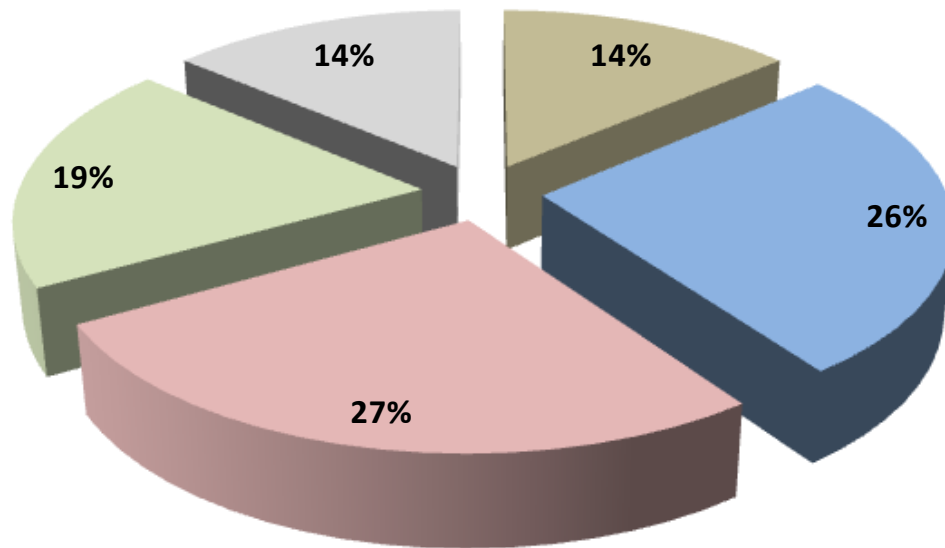
Substitution Analysis

How often do you consider that SMS is a good substitute of mobile calls?

How often do you consider landline calls to be a good substitute of mobile calls?

Sample Size – 703

Sample Size – 703



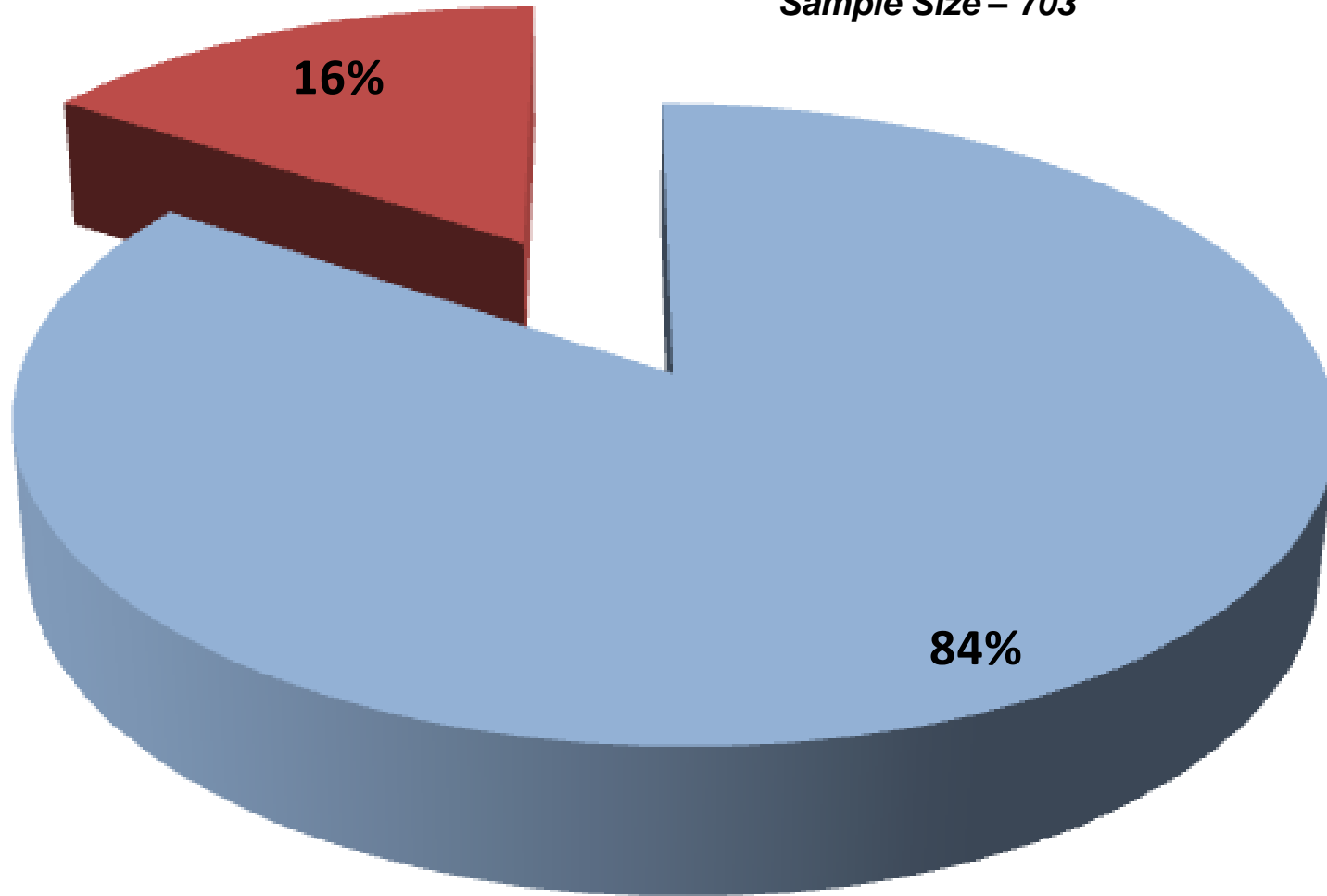
Always Often Sometimes Rarely Never

Always Often Sometimes Rarely Never

4. Internet Access via Mobile Telephone

Type of Mobile Phone

Sample Size – 703



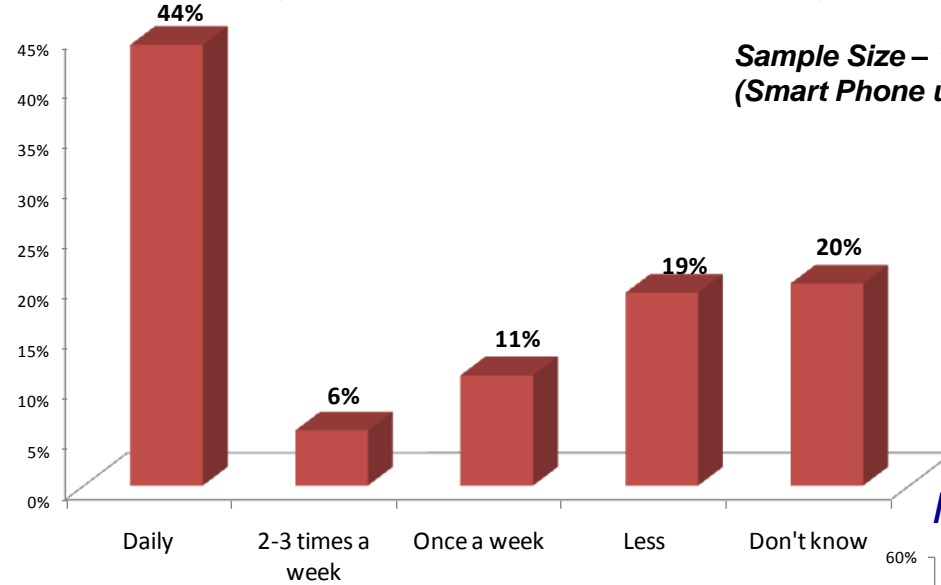
■ Normal mobile phone

■ Smart phone (HTC, Blackberry, Iphone...)

Internet Access via Mobile Phone (1)

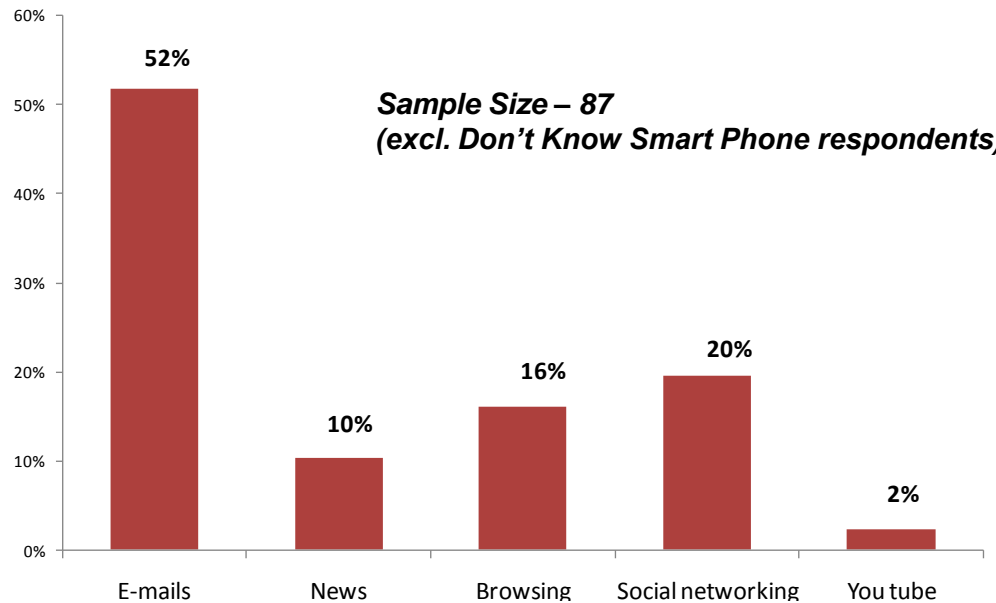
How often do you make use of internet on your mobile?

**Sample Size – 109
(Smart Phone users only)**



For what do you mostly use internet on your mobile?

**Sample Size – 87
(excl. Don't Know Smart Phone respondents)**

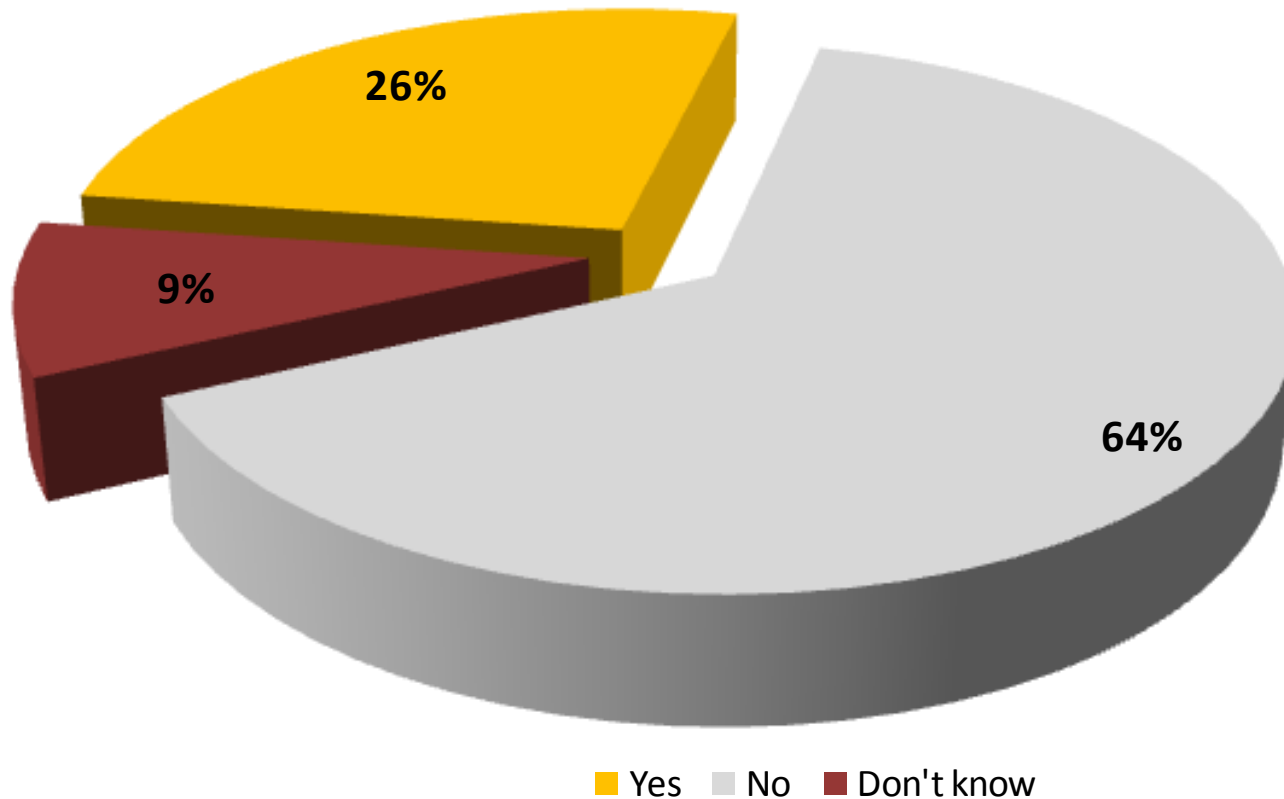


Internet Access via Mobile Phone (2)

Are you subscribed to a specific mobile data plan?

Sample Size – 87
(excl. Don't Know respondents)

80% of those who claim to have a Smart Phone (16% of total respondents with a mobile phone) say they use mobile phone internet

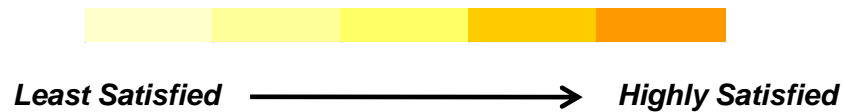
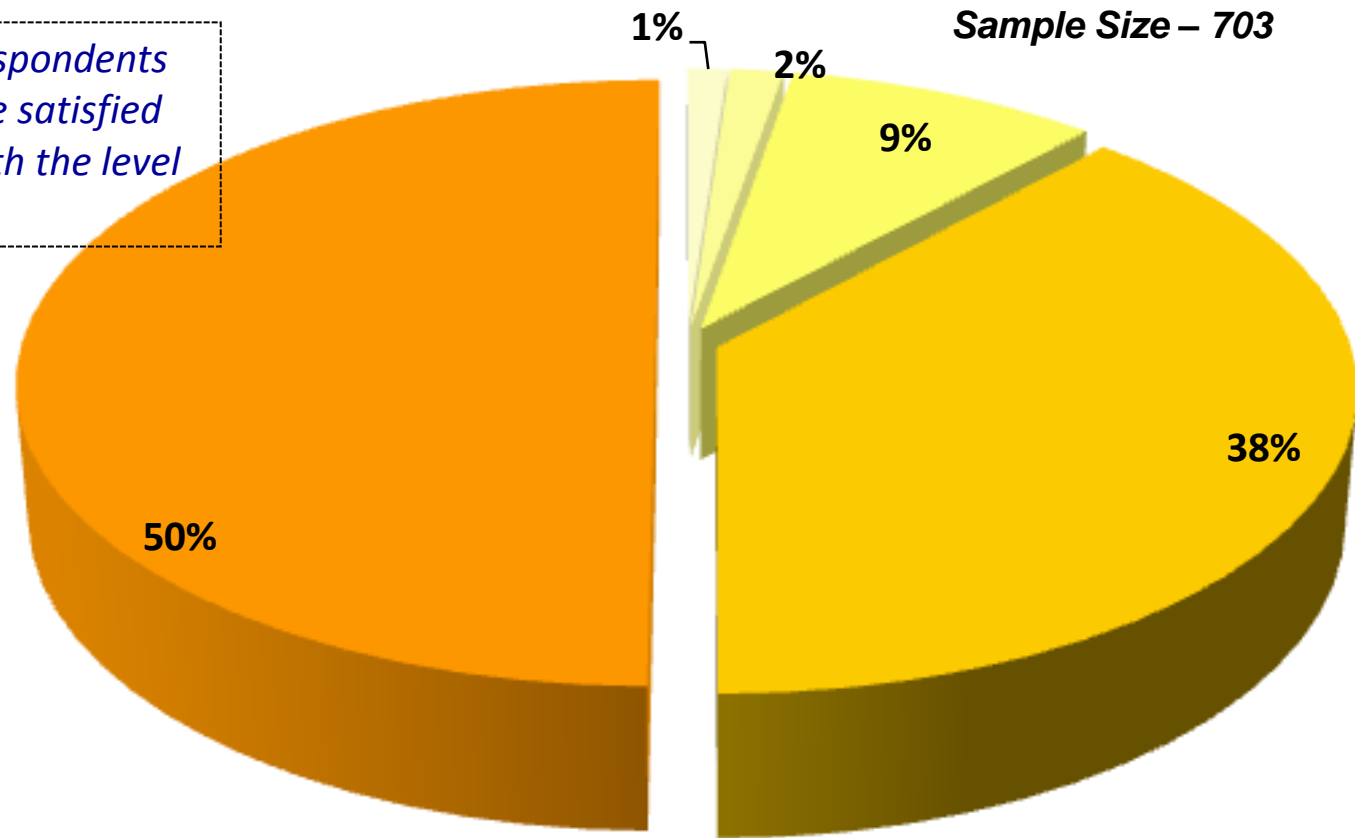


5. Quality Satisfaction Index & Market Development

Quality Satisfaction Levels

Are you satisfied with the quality of reception and service you get from your mobile operator?

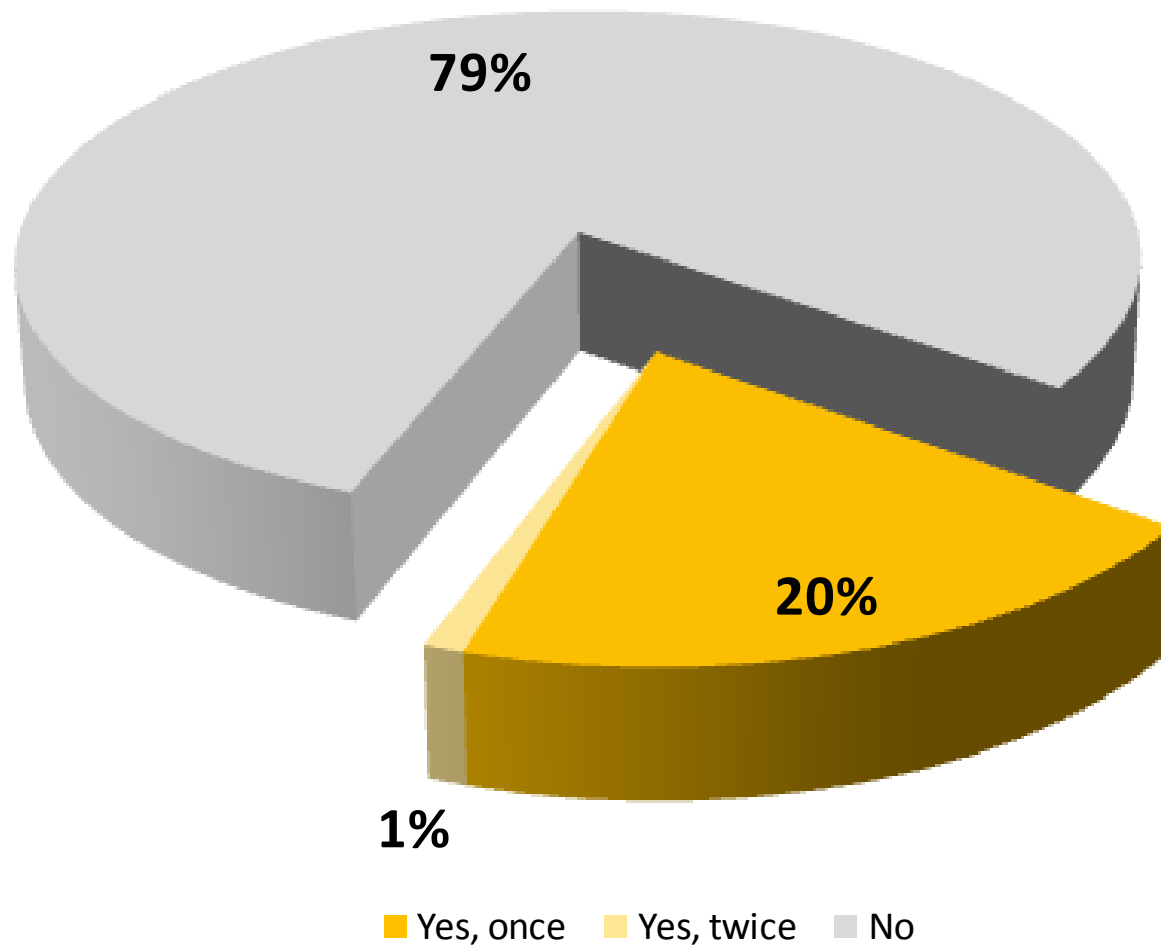
More than 88% of respondents with a mobile line are satisfied or highly satisfied with the level of service.



Movements in Mobile Subscriptions (1)

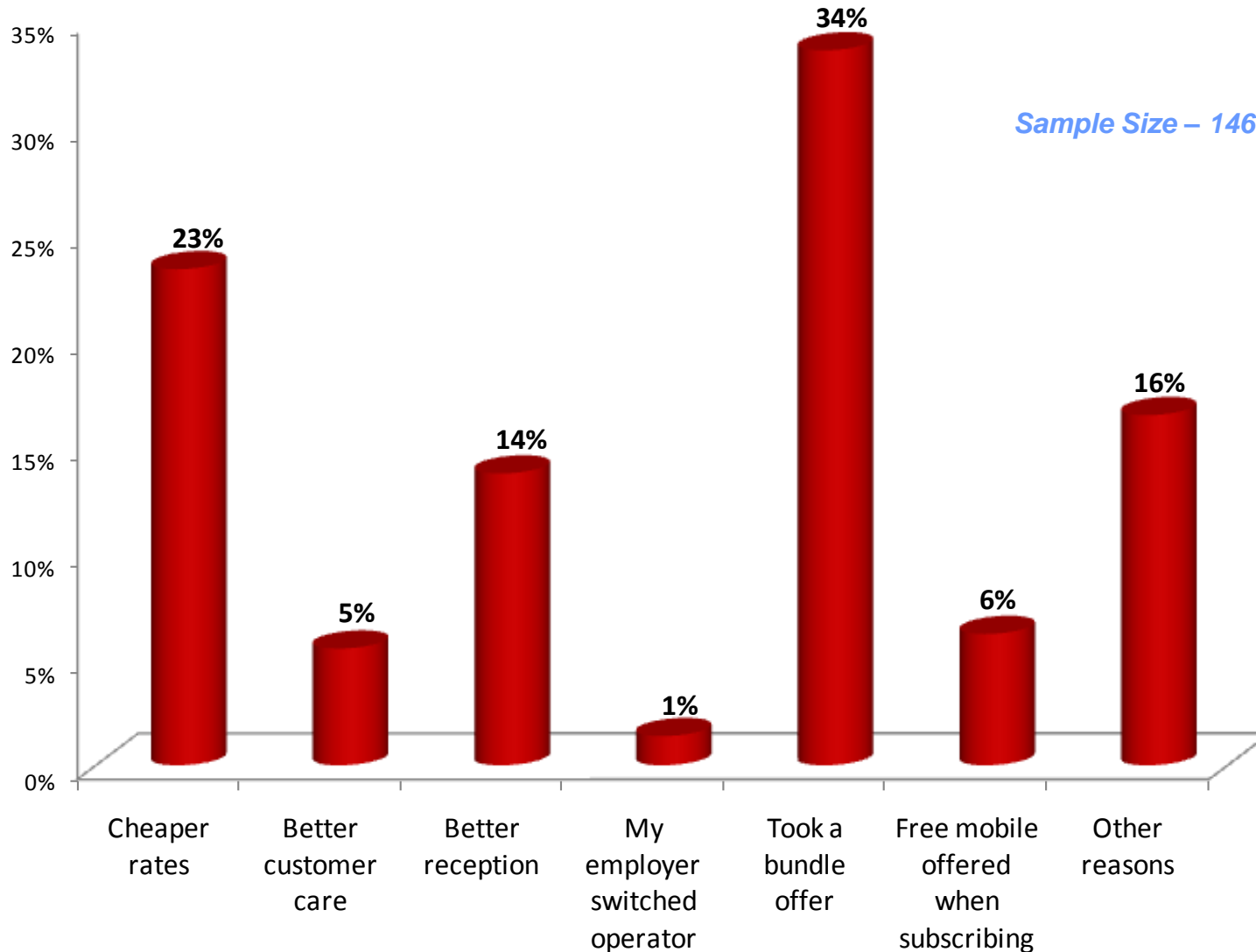
Have you ever changed from one operator to another over the last two years?

Sample Size – 703



Movements in Mobile Subscriptions (2)

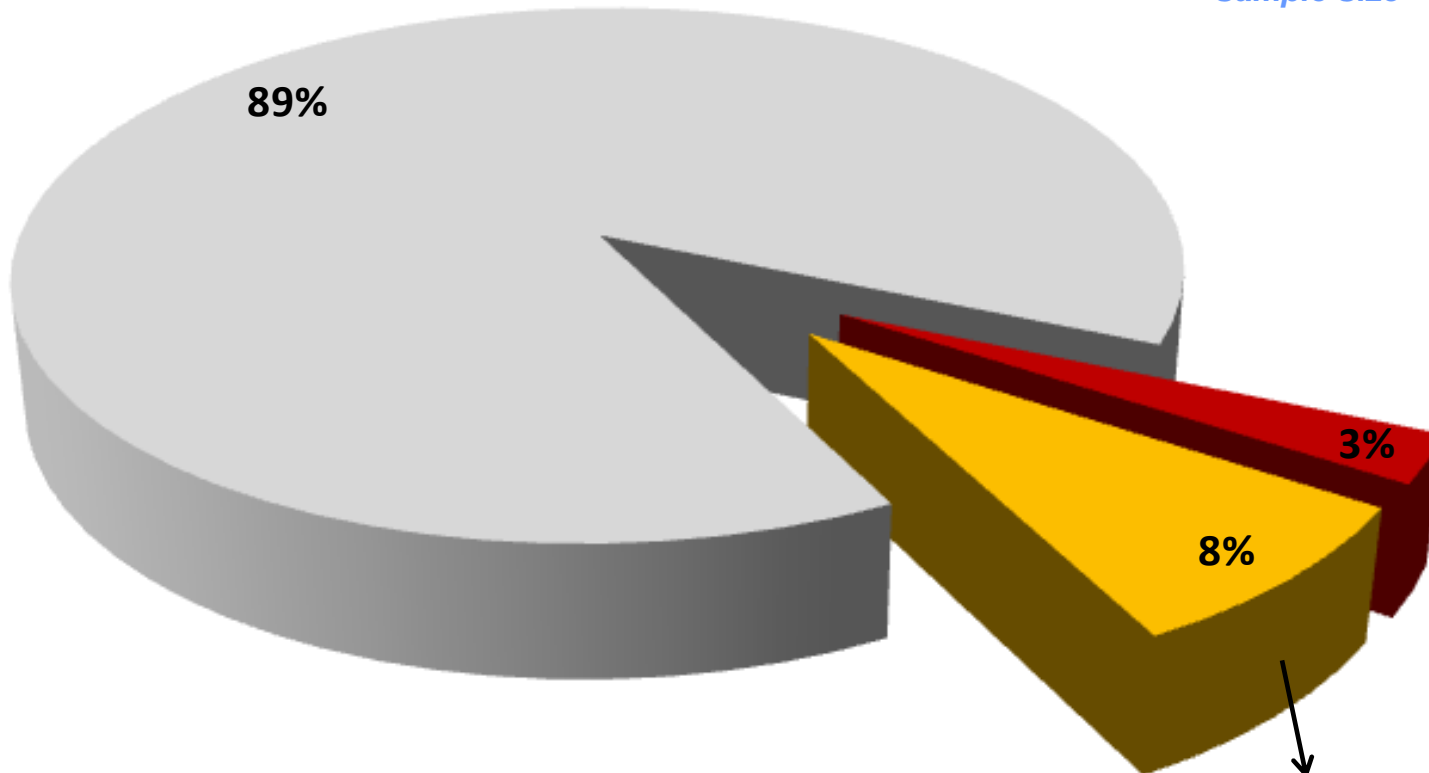
Why have you changed your mobile operator?



Ease of Switching between Mobile Operators

Was it difficult to change from one operator to another?

Sample Size – 146



■ Yes ■ No ■ Don't know

Half of the respondents who claim to have faced difficulties in changing from one operator to another said this was because they encountered delays in number porting.

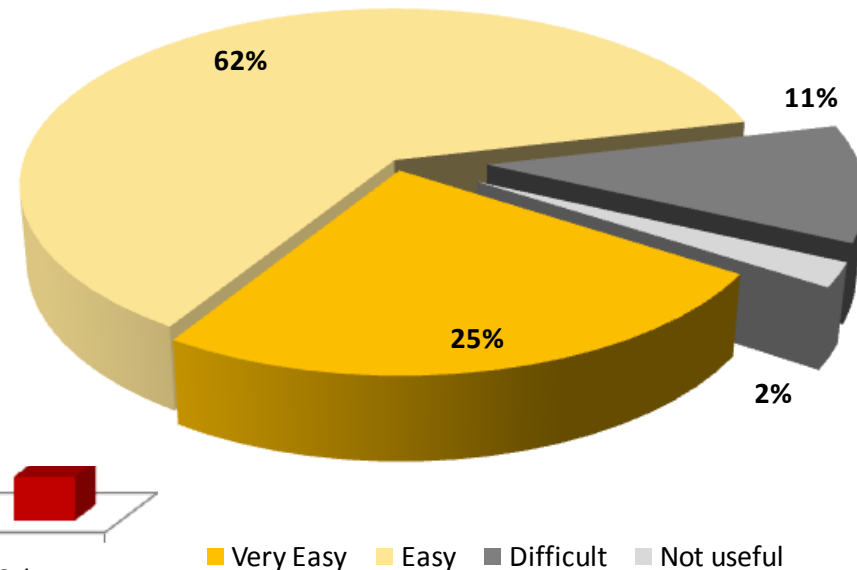
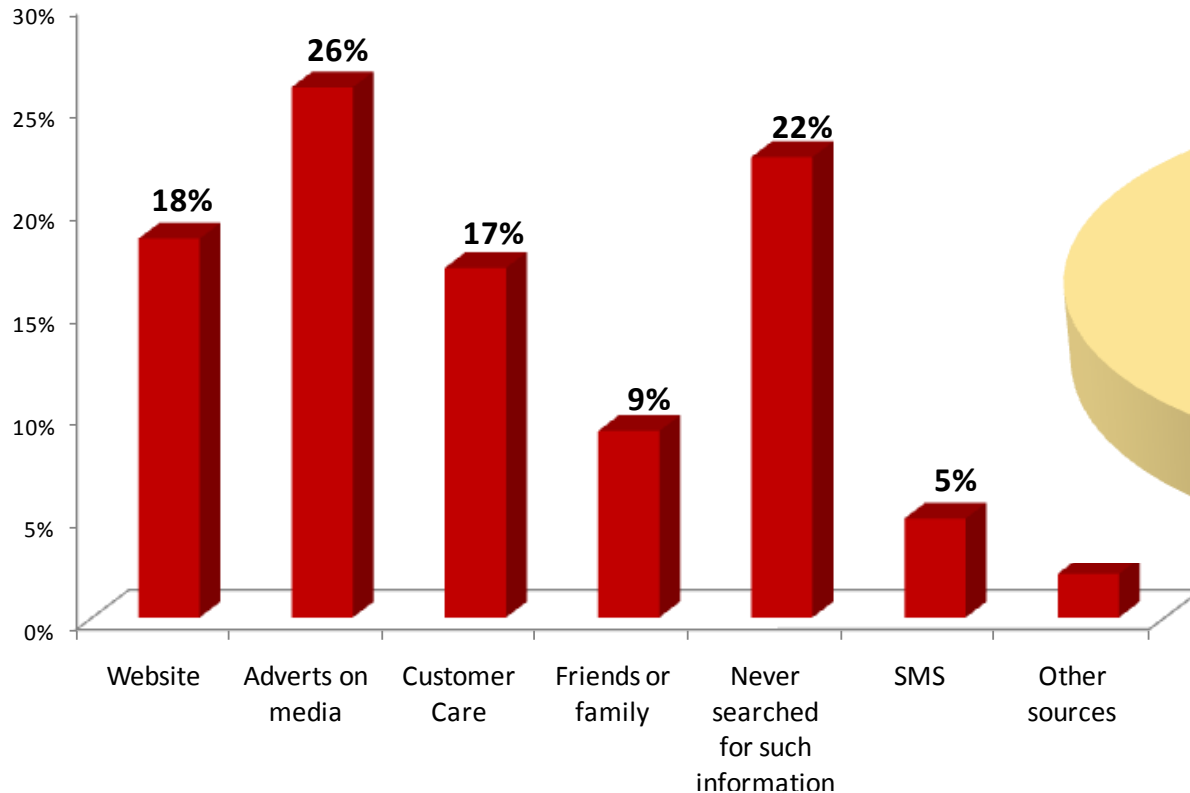
Sources of Information on Mobile Services

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

How easy is it to understand and choose a specific pricing plan?

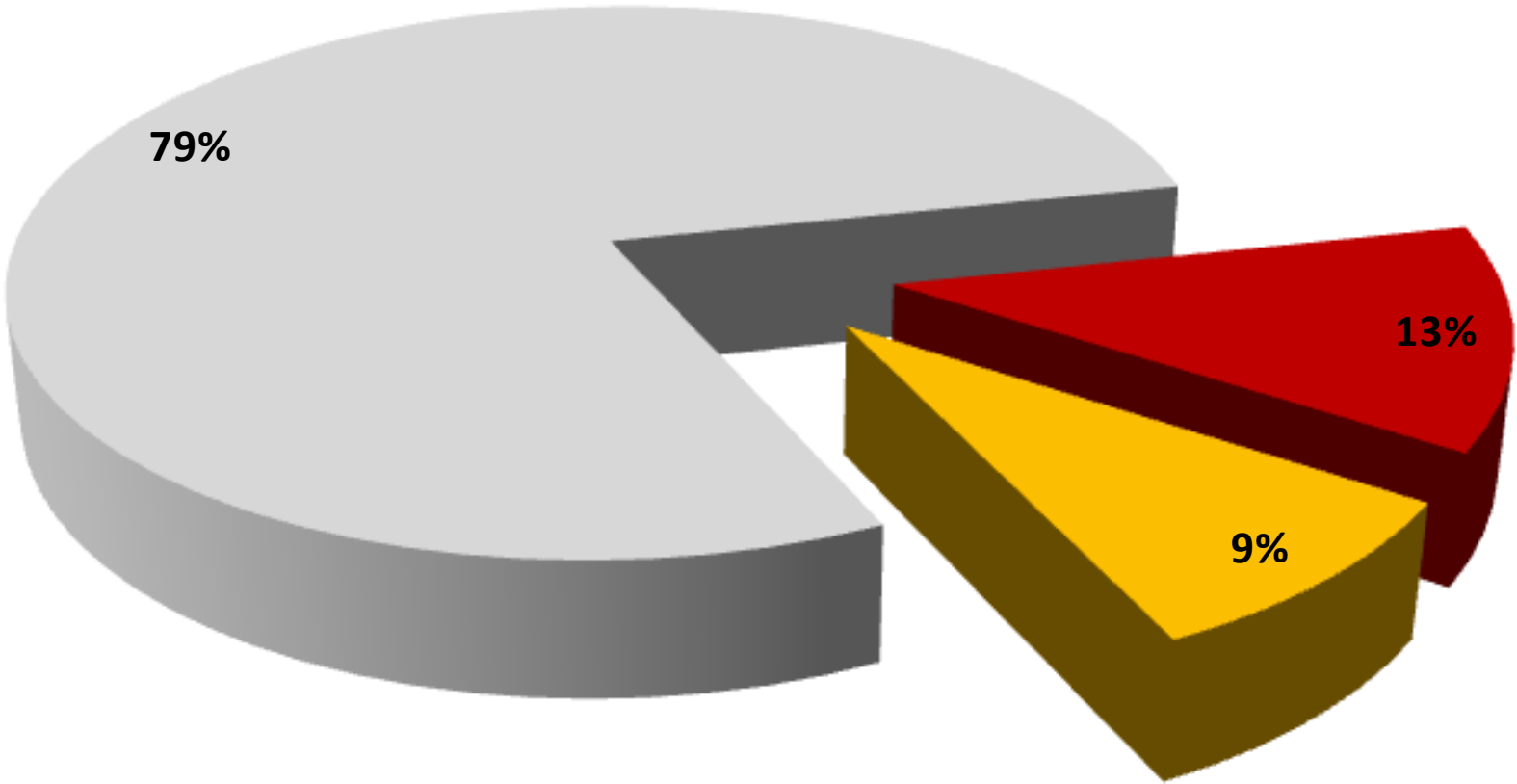
Sample Size – 703

Sample Size – 545: excl. those who never searched for such info.



During these last two years did you revise your mobile plan?

Sample Size – 703



Yes No Don't know



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