**An overview of findings for a perception survey concerning fixed telephony usage in Malta**

***Fieldwork carried out in July to September 2019***

**Main survey findings**

The MCA is hereby publishing the findings of a survey gauging consumer perceptions of fixed telephony services offered in Malta. Survey findings shed light on the level of satisfaction with the products and services being purchased, the sensitivities of consumers to price and switching decisions, and the overall experience with quality of service and customer care processes.

Of course, the circumstances in which this survey was carried out where substantially different to those prevailing at the moment, with a whole nation having to adapt around the COVID-19 measures announced over the past weeks. Nevertheless, the MCA believes the findings presented hereunder are still relevant from a historical standpoint, allowing us to explain changes based on comparisons with findings of other similar surveys carried out in the past every two-to-three years.

EMCS Consulting carried out the survey contacting 852 randomly selected households via telephone interviews (CATI) on behalf of the MCA.

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*More people with fixed telephony in a bundle*

99% of all household respondents claim to have a fixed telephony subscription. Comparing survey findings for the years 2017 and 2019, take-up of fixed telephony was strongest in the post-paid segment, with the proportion of respondents purchasing their post-paid plan in a bundle rising marginally from 71% in 2017 to 72% in 2019.

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*Rising monthly expenditure on the service*

Around 55% of respondents to the 2019 survey say they are not aware of their monthly expenditure on the fixed telephony service. This is because their bundle subscription makes it difficult for them to apportion their monthly cost by each bundle component. The rise in monthly payments via direct debit may also contribute to the lack of knowledge on monthly expenditures.

45.5% say they are aware of their monthly expenditure on the fixed telephony service, with this segment comprising 7.5% saying they spend up to €9.99 per month, 12.2% saying they spend between €10 to €19.99 (up from 11% in 2017), 19.9% saying they spend between €20 to €49.99 (up from 7.0% in 2017) and 5.3% saying they spend €50 or more per month (up from nil in 2017).

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*Cost of a one-minute voice call*

Knowledge of a one-minute voice call is also low. This is somewhat expected given the availability of voice call allowances in today's fixed telephony plans, especially the unlimited on-net allowances with the purchase of bundles that typically include the fixed telephony service by default.

Amongst the few respondents saying they are aware of the cost of a one-minute fixed voice call, 47% find it 'cheap', down by almost half over the previous study. The number of respondents that perceived the cost to be expensive stood at 19%, up from just 4% a year earlier. a decline of 14% over the previous study.

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*A satisfied customer base with limited switching activity*

*86% of all* survey respondents saying they have a subscription claim they are satisfied (34%) to very satisfied (52%) with the service. Switching between operators remains low, with 92% of all respondents saying they have not switched operator in the previous two years. More significantly, 50% of respondents saying they are not satisfied with their current service quality also say they did not switch their current provider. Of note is that the majority of those who switched service provider in the previous two years (57%) ported their fixed line number as well.

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*Mobile voice calling and OTT voice calling increasingly being used*

In line with the strong take-up of mobile telephony services and rising usage of OTT-based calling, respondents classify fixed telephony as their least preferred platform for voice calling purposes. Nonetheless, just 29% of those that prefer mobile telephony say they would be ready to terminate their fixed telephony subscription over the next 12 months.

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**Background to the survey function at the MCA**

The MCA has been regularly carrying out the Consumer Perception Surveys on a two-yearly interval since 2008. The main purpose behind this exercise is to gather information on the level of satisfaction of local consumers with the products and services offered by electronic communication service providers and the extent to which these providers are able to address the demands of their clients. Given that these surveys have been carried out regularly for a number of years, survey results are indicative of how the needs of end-users have developed over time and how local service providers are dealing with changing demand over the years.

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

**Methodology and Fieldwork**

The methodology used in the latest round of consumer surveys, including the sampling, questionnaire design, fieldwork and weighting processes followed similar approaches to previous surveys. The research methodology involved the use of Telephone Computer-assisted interviewing (CATI).

Consumers sampled were stratified according to the age composition of the Maltese population. Moreover, the interviews were distributed among Malta's six official geographic regions and carried out across different socio economic categories of the Maltese population.

For a more comprehensive picture, a presentation encompassing the main survey findings is available on the MCA website via this link.