Perceptions of mobile telephony users in Malta

Based on survey findings

March 2020

General information

- Focus on perceptions of Malta's mobile telephony services in third quarter of 2019.
- EMCS carried out fieldwork on behalf of MCA.
- Sample based on private individuals in Maltese households.
- 98.9% of all respondents say they have a mobile subscription, up from 87% in 2011.
- Current survey results comparable with findings for 2011; 2013; 2015; and 2017.

Fieldwork	Eligibility	Response
• Sample selected randomly; • CATI - Phone interviews approx. 20 minutes; • Only one person per household interviewed, aged 18 years or over.	• Age range: 18+; • Malta's six official geographic regions; • Socio economic categories of the Maltese population.	• 852 net respondents; • margin of error 4% at 95% confidence interval.

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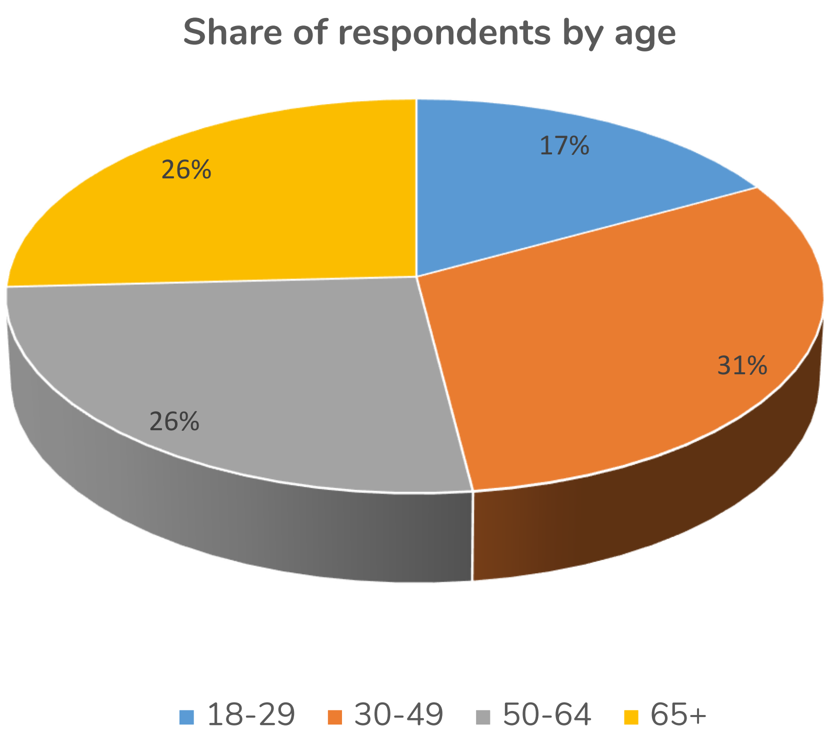
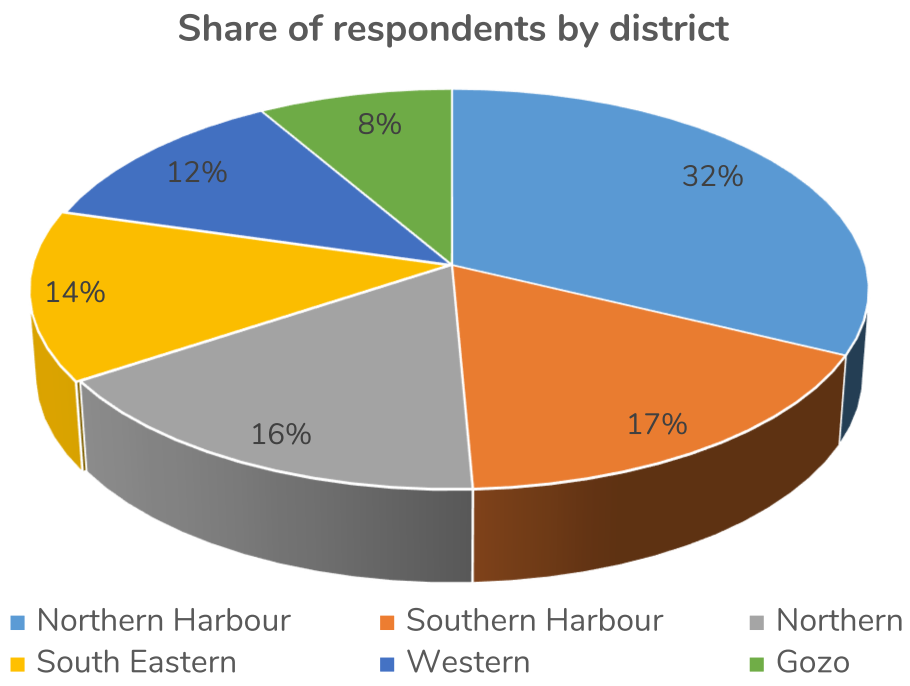
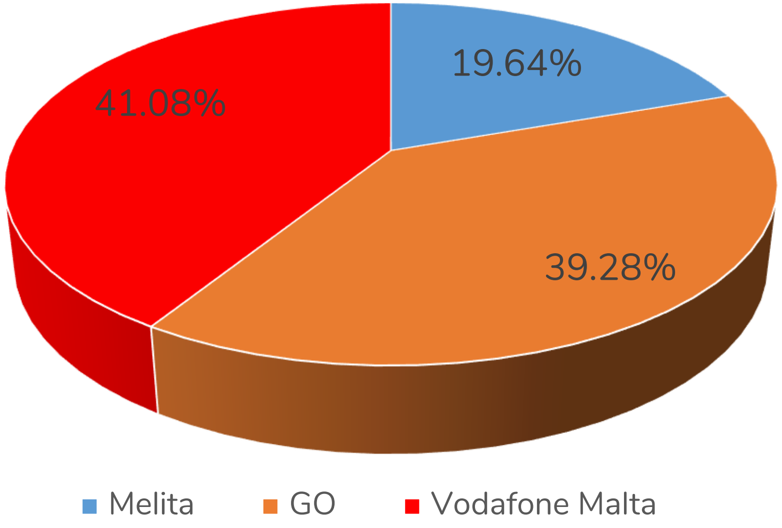
Demographic distribution





Profile of respondents by operator

Share of respondents with a mobile subscription by operator (n = 843)



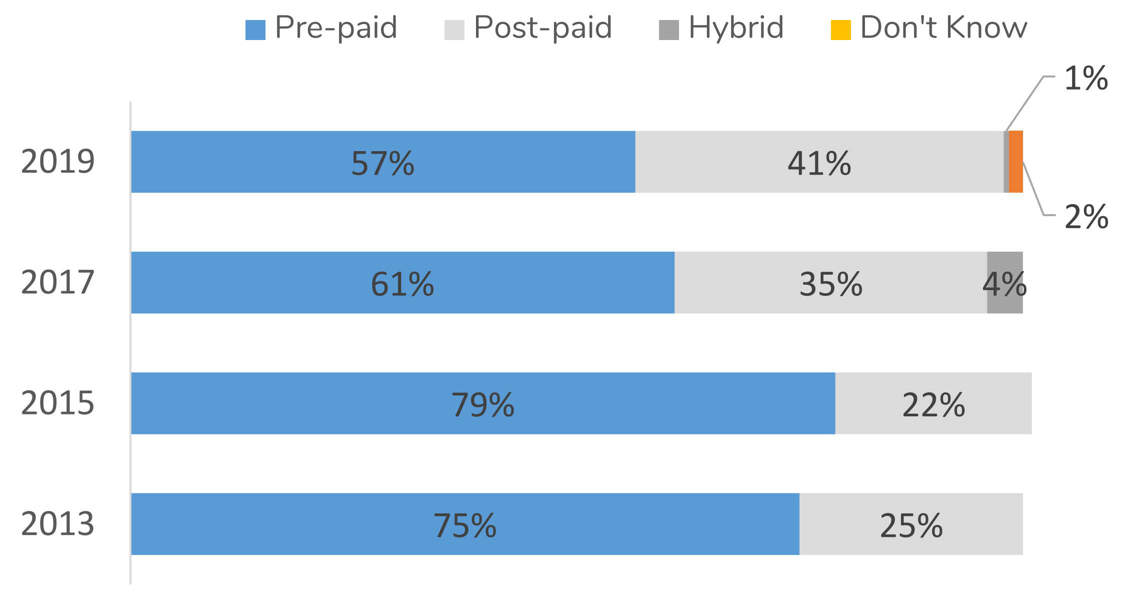
Focus is solely on private individuals in Maltese households. Actual figures quoted in MCA publications include both business and individuals, hence the difference.

	Survey average
%age of respondents by operator – 18 to 49 years of age	48.5%
%age of respondents by operator – 50 years or more	51.5%
%age of respondents with a post-paid plan	41.9%
%age of respondents with a multiple subscription	8.2%
%age of respondents with no smartphone*	28.6%

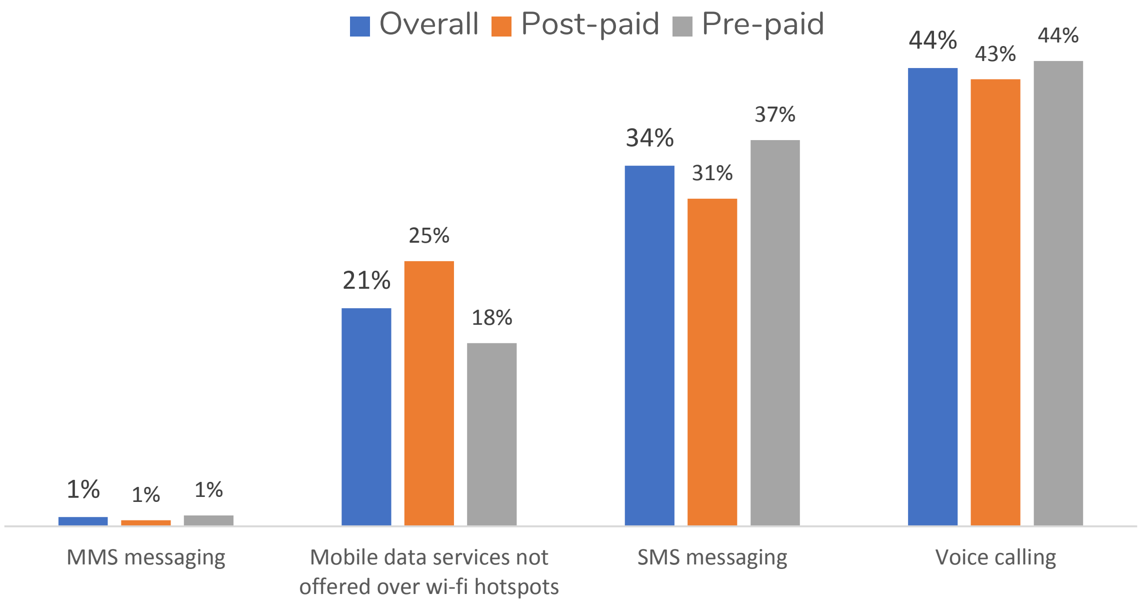
Note: *All respondents saying they do not have a smartphone were over 65 years of age.

Profile of subscriptions by type of plan

Share of respondents with a mobile subscription by type of plan



Usage of mobile telephony according to preference



More people opting for post-paid plans as data increasingly features as the main factor for using the mobile subscription. 76% of respondents on post-paid plans say they have a 2-year contract.

Note: Responses were ranked by preference and weighted, with a score of 4 for the 1st preference; a score of 3 for the 2nd preference etc.

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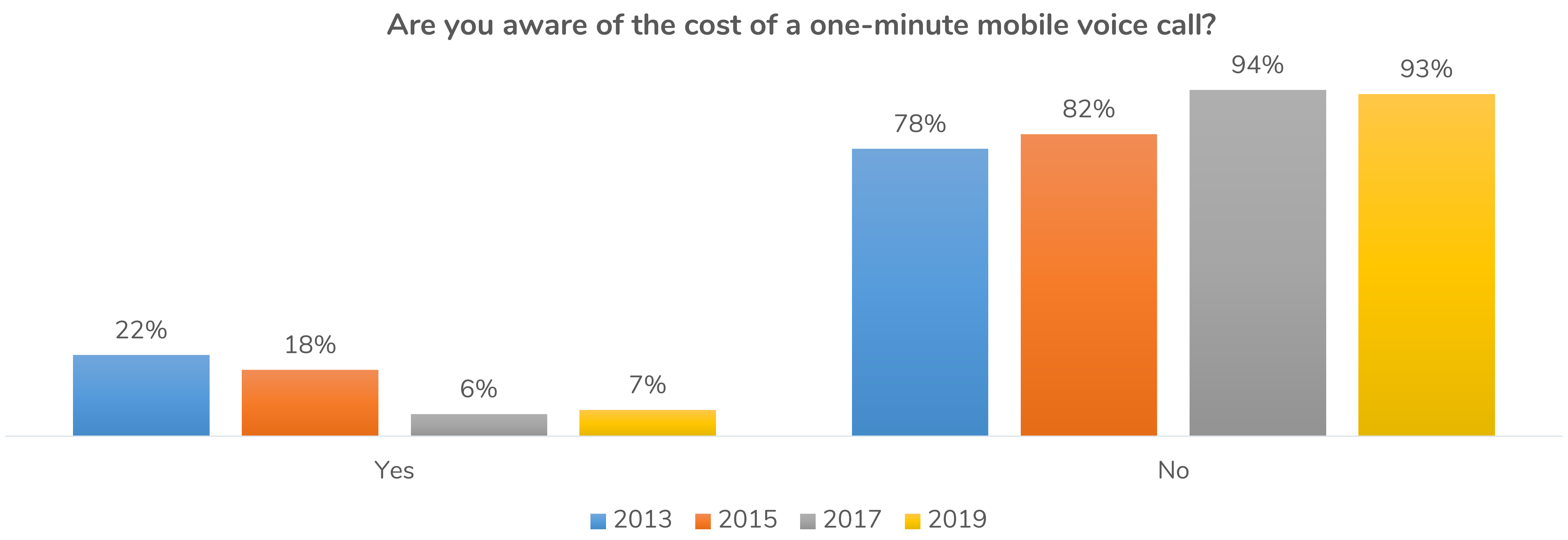
Monthly expenditure

Monthly expenditure by type of plan	Overall			Post-paid (incl. hybrid)	Pre-paid
	2015	2017	2019		
Up to €9.99	77.0%	83.0%	18.7%	5.5%	29.1%
€10.00 to €19.99			36.1%	23.2%	46.4%
€20.00 to €49.99	19.0%	10.0%	23.3%	36.3%	13.9%
€50 or more	1.0%	1.0%	4.7%	10.8%	-
Don't know	3.0%	6.0%	16.5%	24.3%	10.7%

The proportion of respondents with a mobile subscription not aware of their monthly expenditure has been rising since 2015.

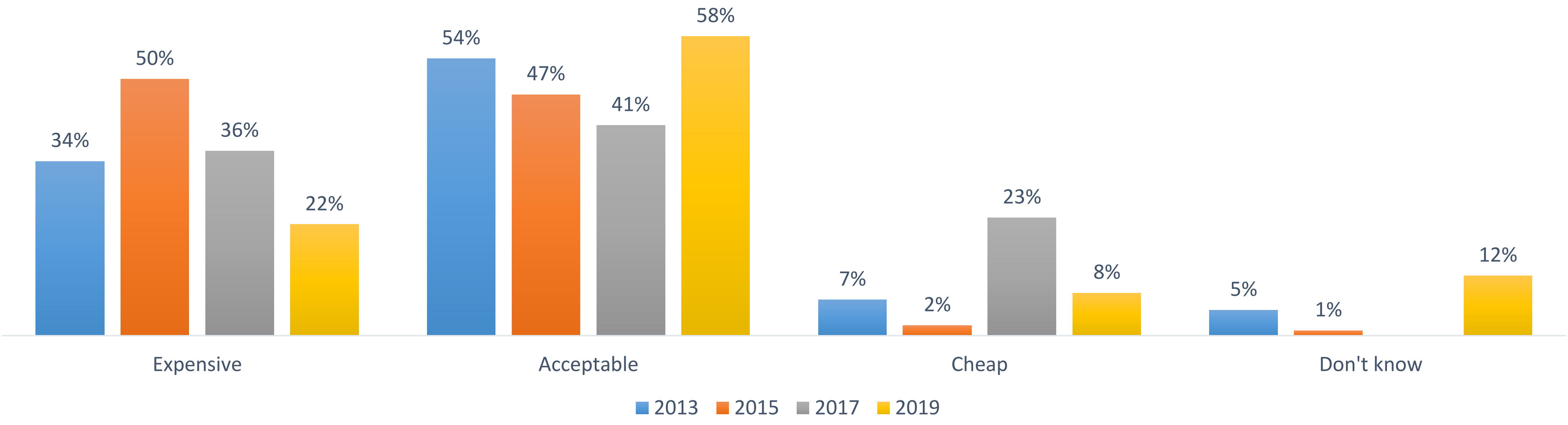
47% of respondents with a post-paid subscription that are aware of their monthly expenditure spend €20 or more per month, compared to 14% for pre-paid.

Awareness of cost of voice calling



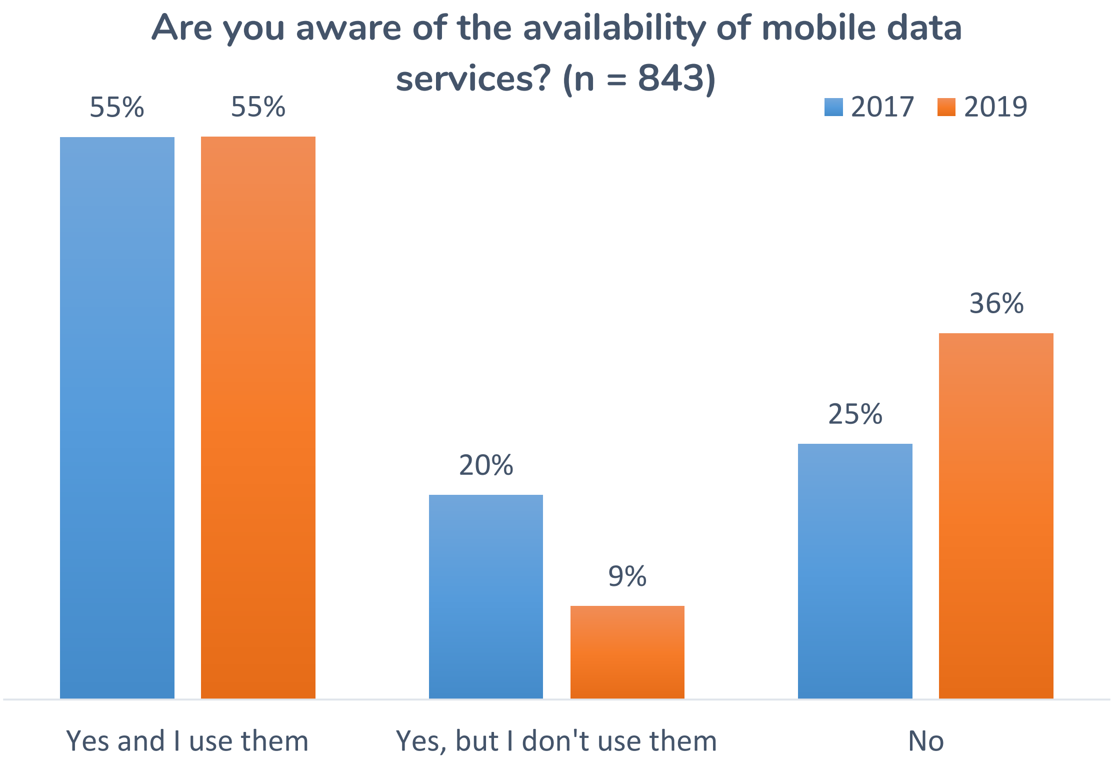
Note: 93% of respondents with a mobile subscription unaware of the cost of a one-minute mobile voice, in line with the previous study.

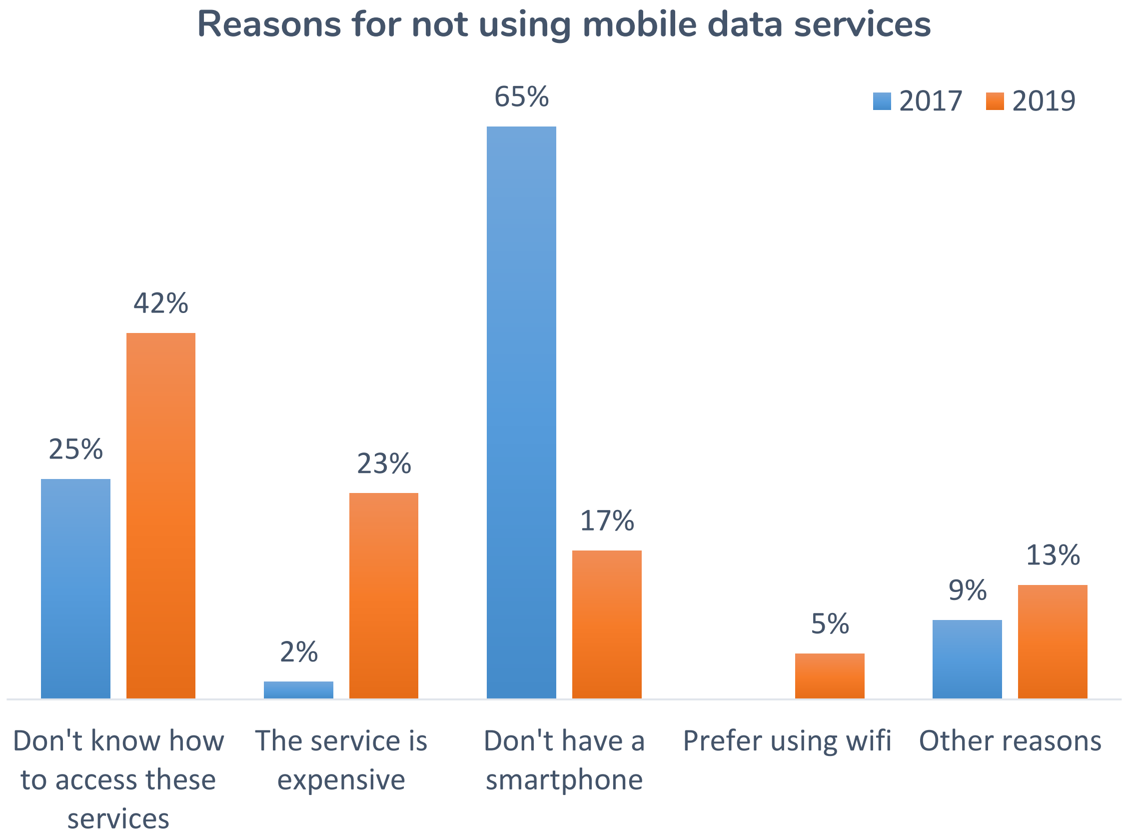
Perceived cost of a one-minute voice call



Among respondents that are aware of the cost of a one-minute mobile voice call, 58% find it ‘acceptable’, an increase of 17% over the previous study. The number of respondents that perceived the cost to be expensive stood at 22%, a decline of 14% over the previous study. Respondents that perceived the cost to be cheap too declined (then 23%, now 8%).

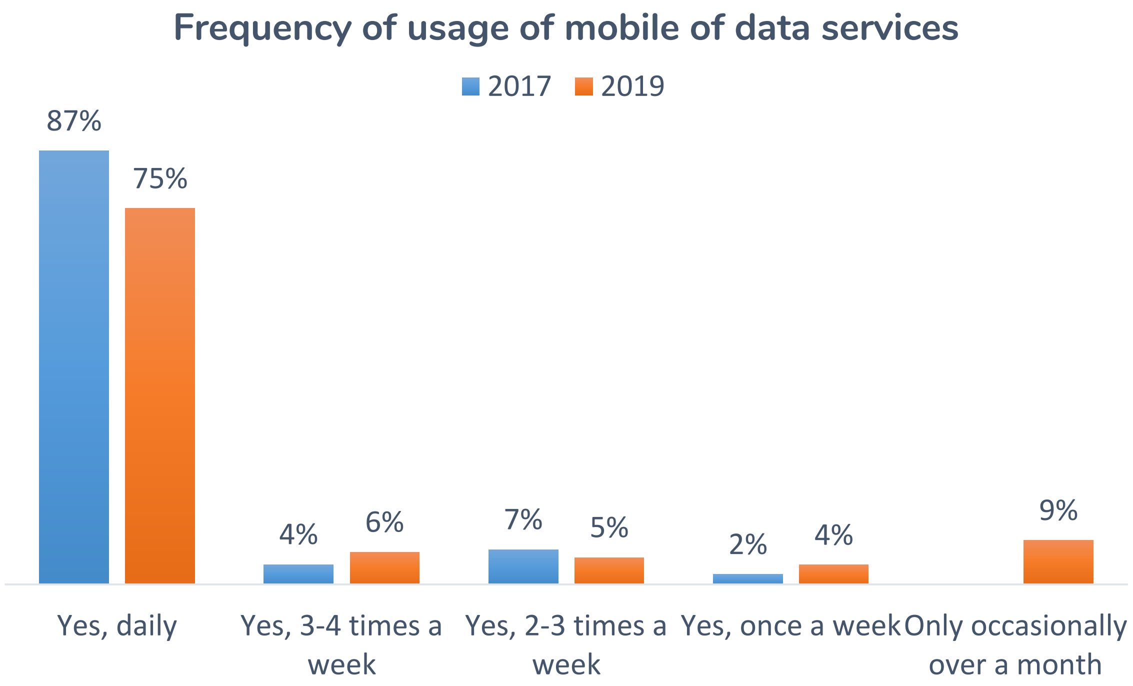
Usage of mobile data services (1 of 3)

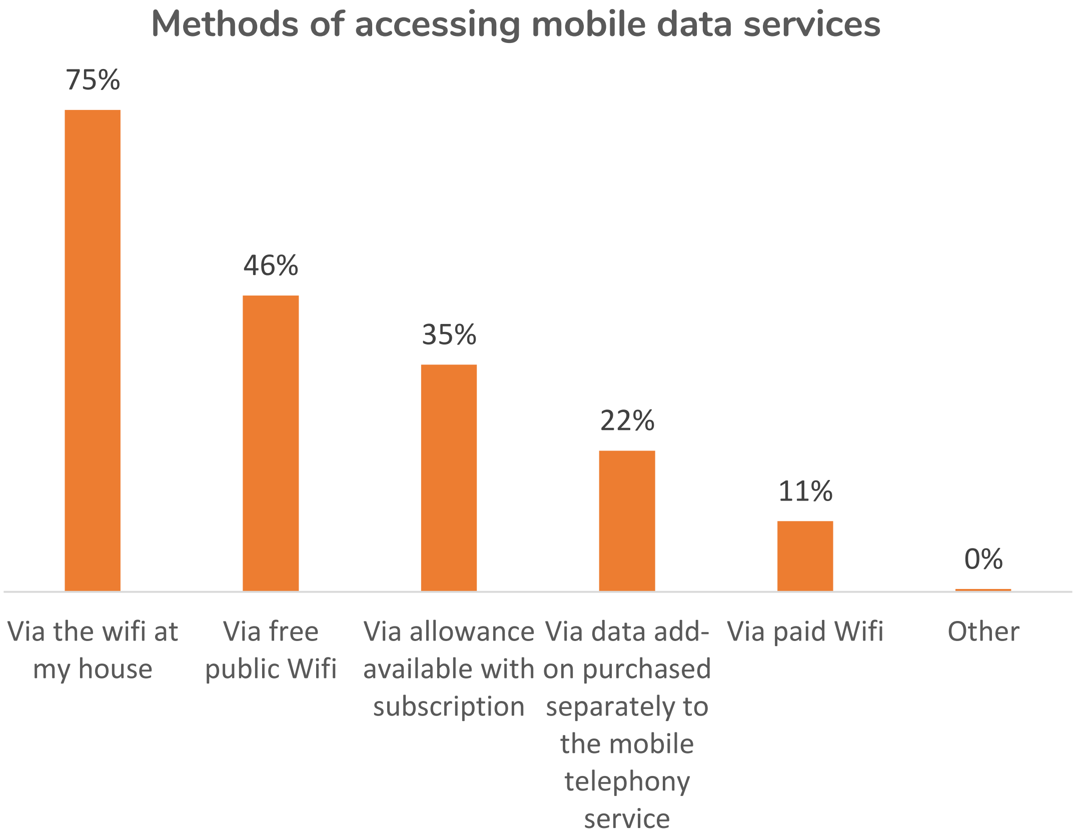




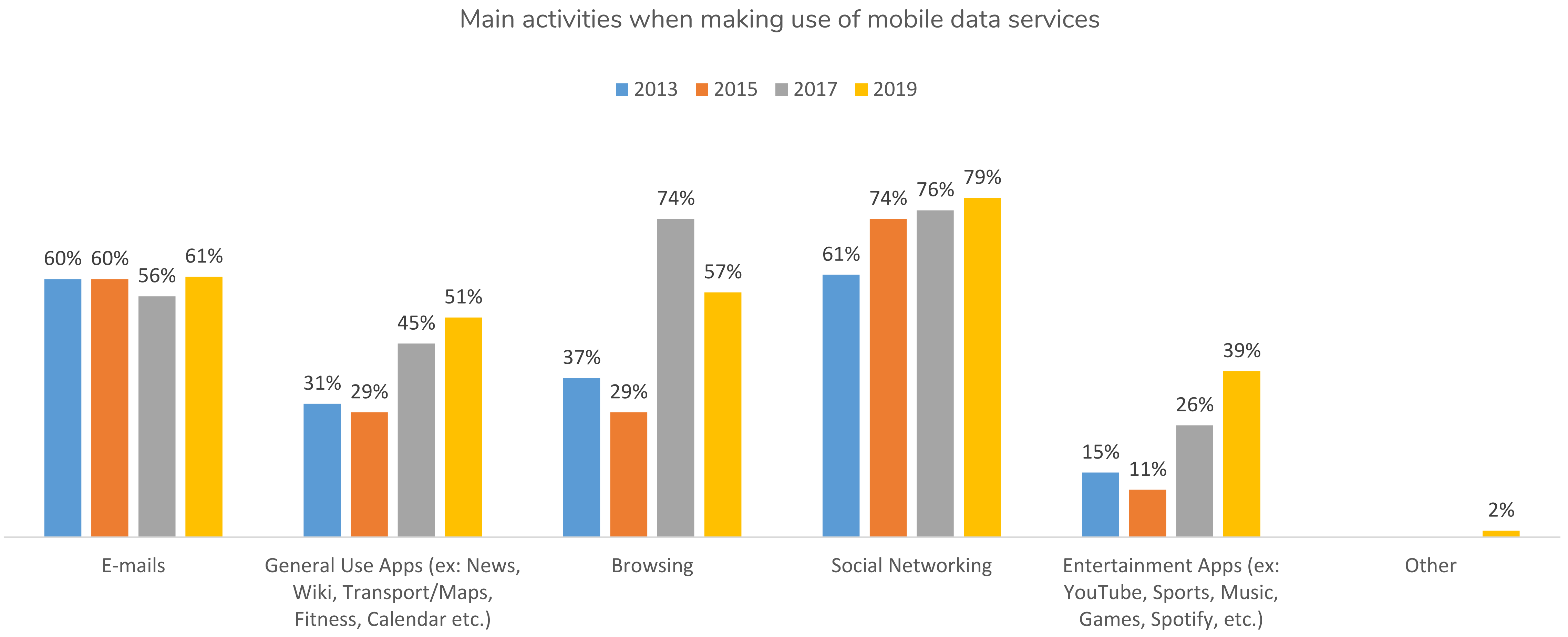
Usage of mobile data (2 of 3)

464 respondents say they are aware of mobile data services and they use them, equivalent to around 55% of all survey respondents saying they have a mobile subscription. Results outlined below and the next slide are based on responses of these 464 respondents.



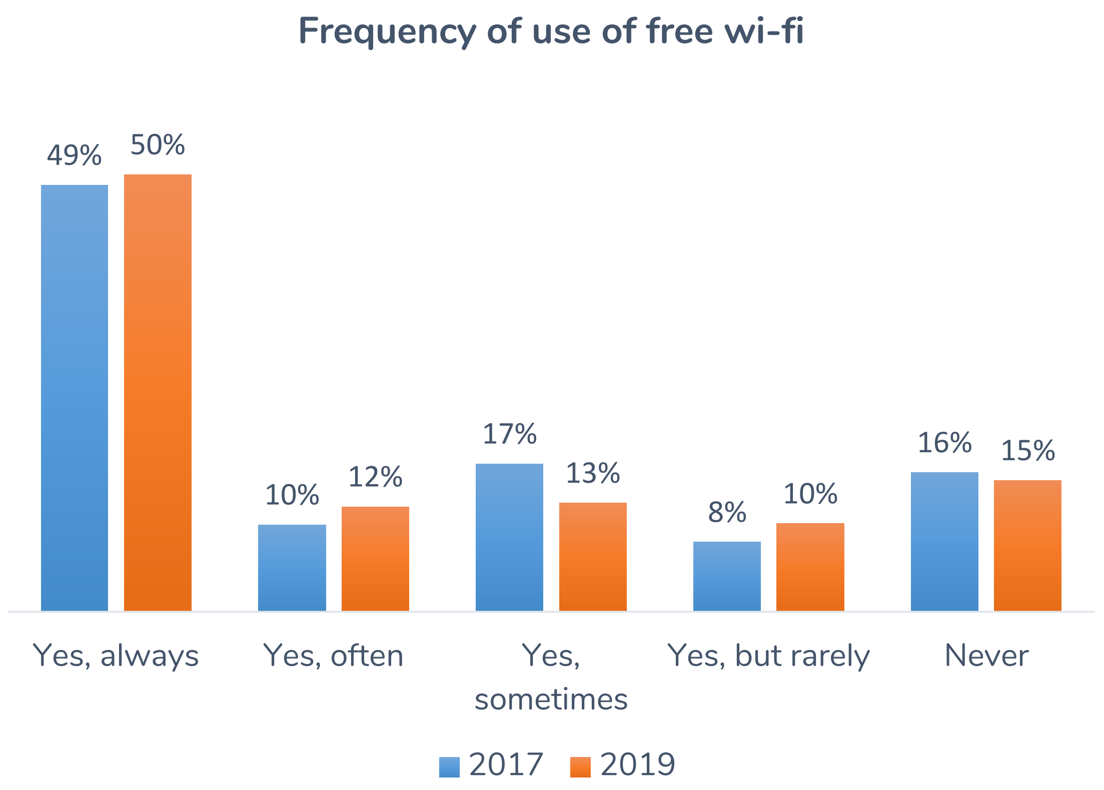


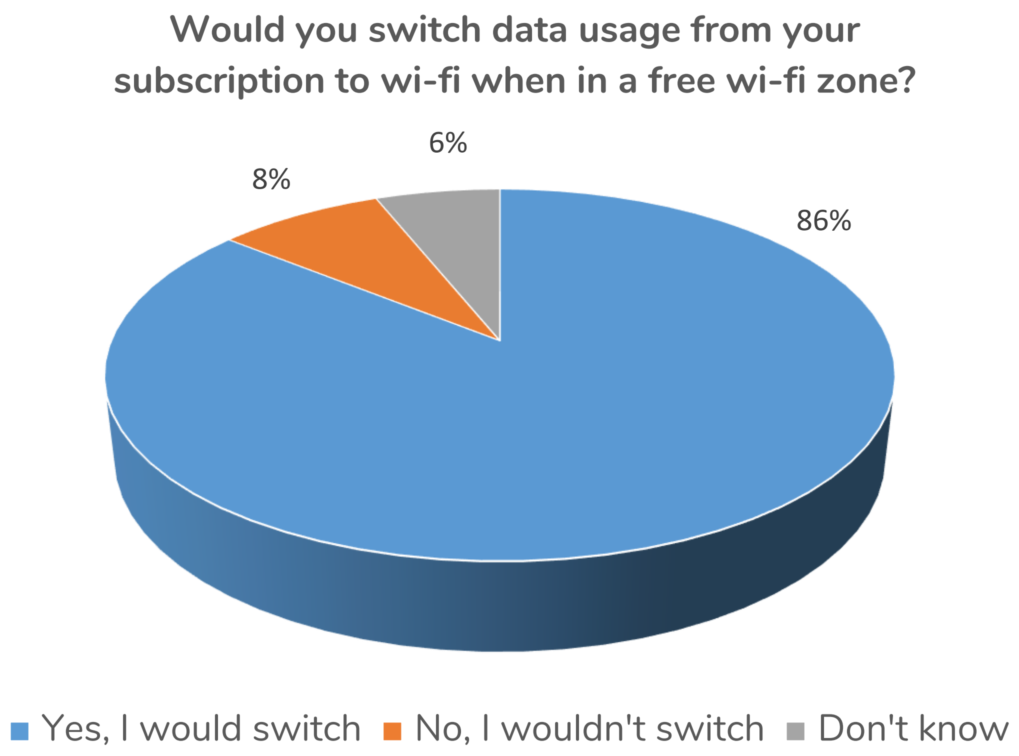
Usage of mobile data (3 of 3)



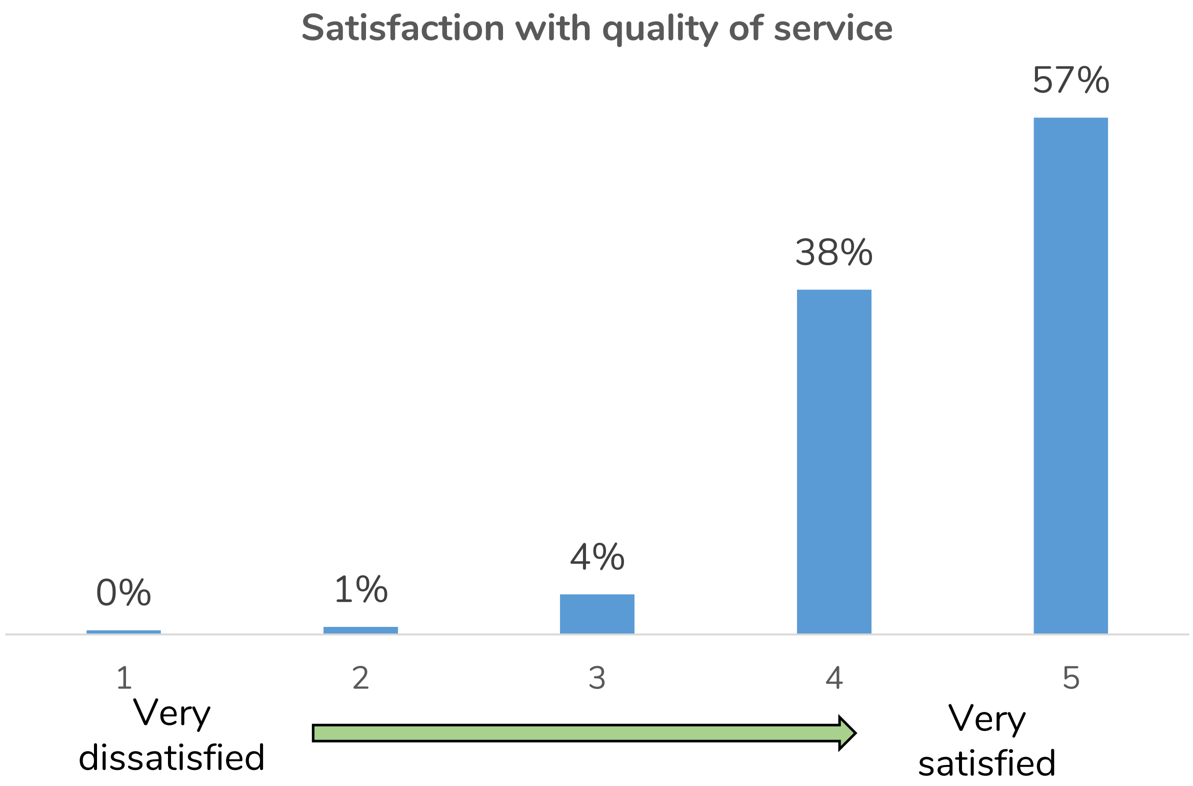
Usage of free wifi services

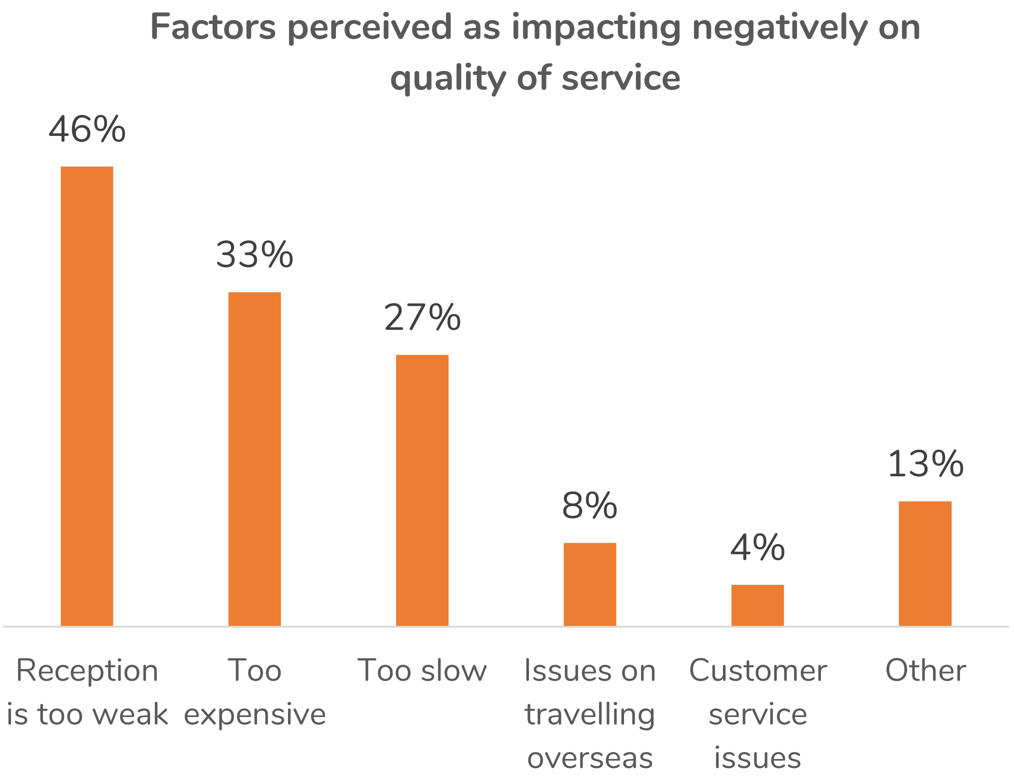
85% of mobile data users make use of free wi-fi services offered in public areas, to varying degrees.





Quality of service (1 of 2)





95% of respondents claim to be satisfied to highly satisfied with their mobile service, in line with 2017 results. Those not satisfied identify weak reception and cost of service as the two main factors for their dissatisfaction.

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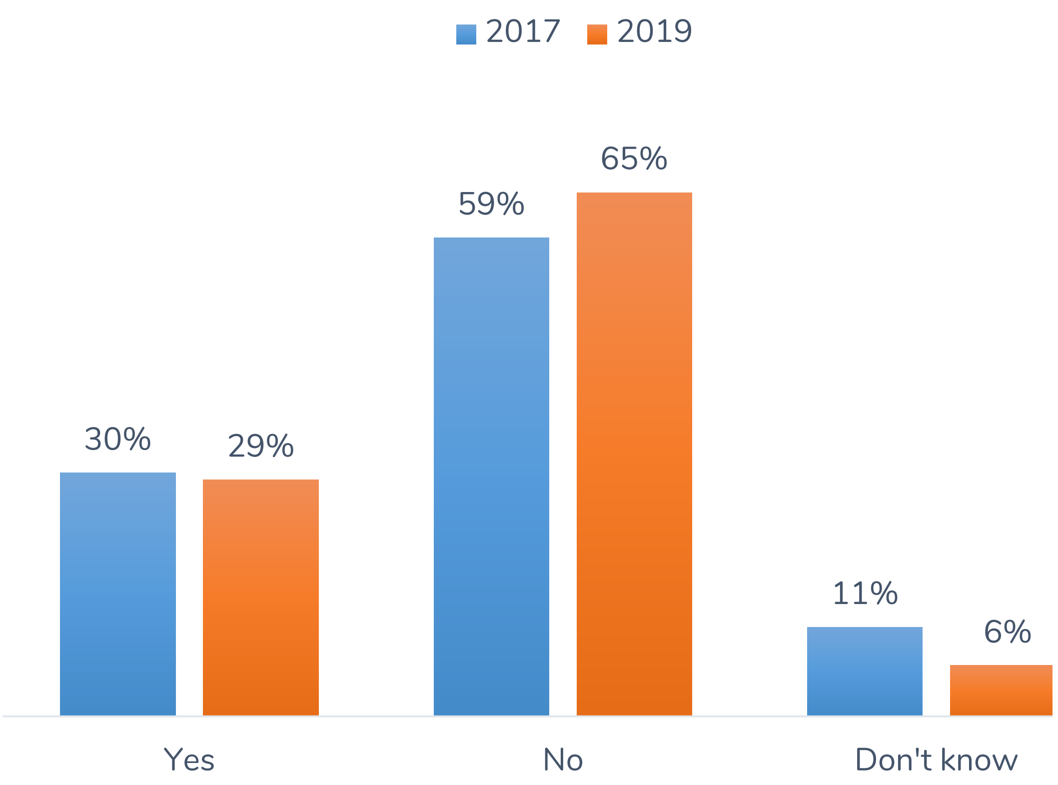
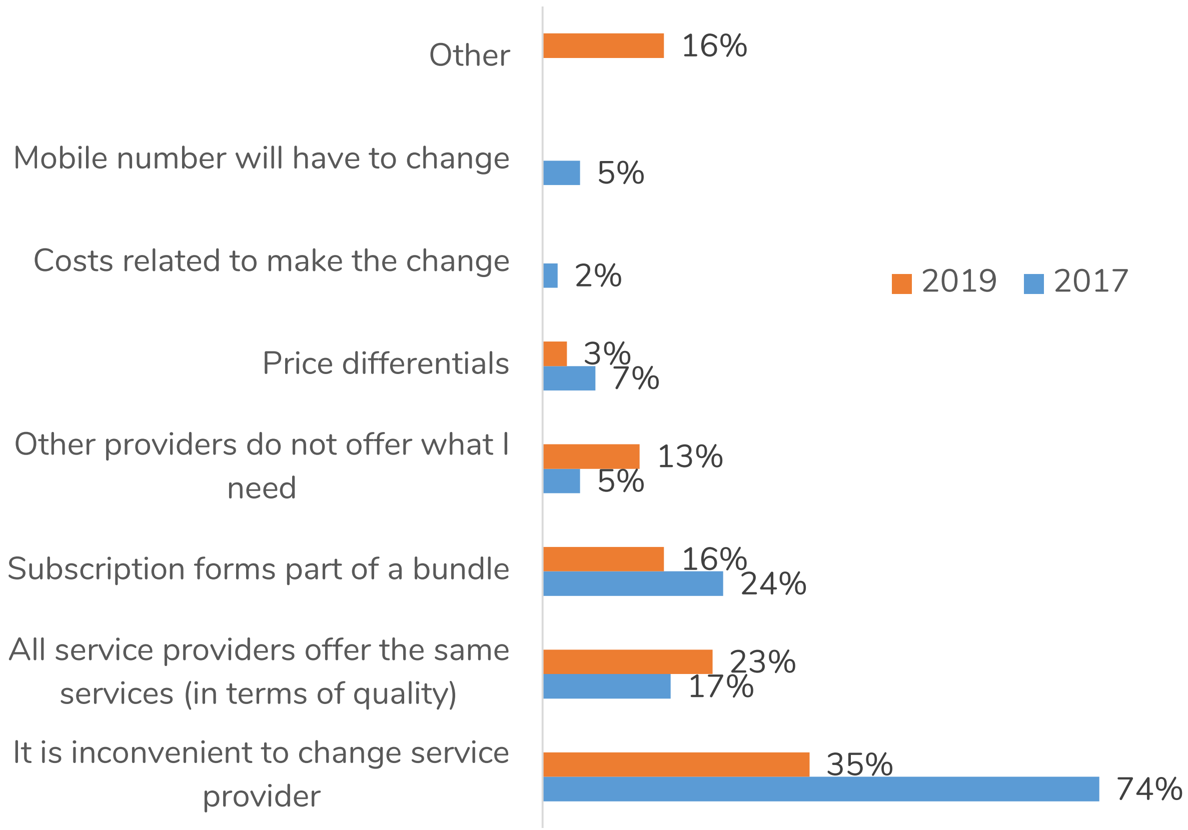
Quality of service (2 of 2)

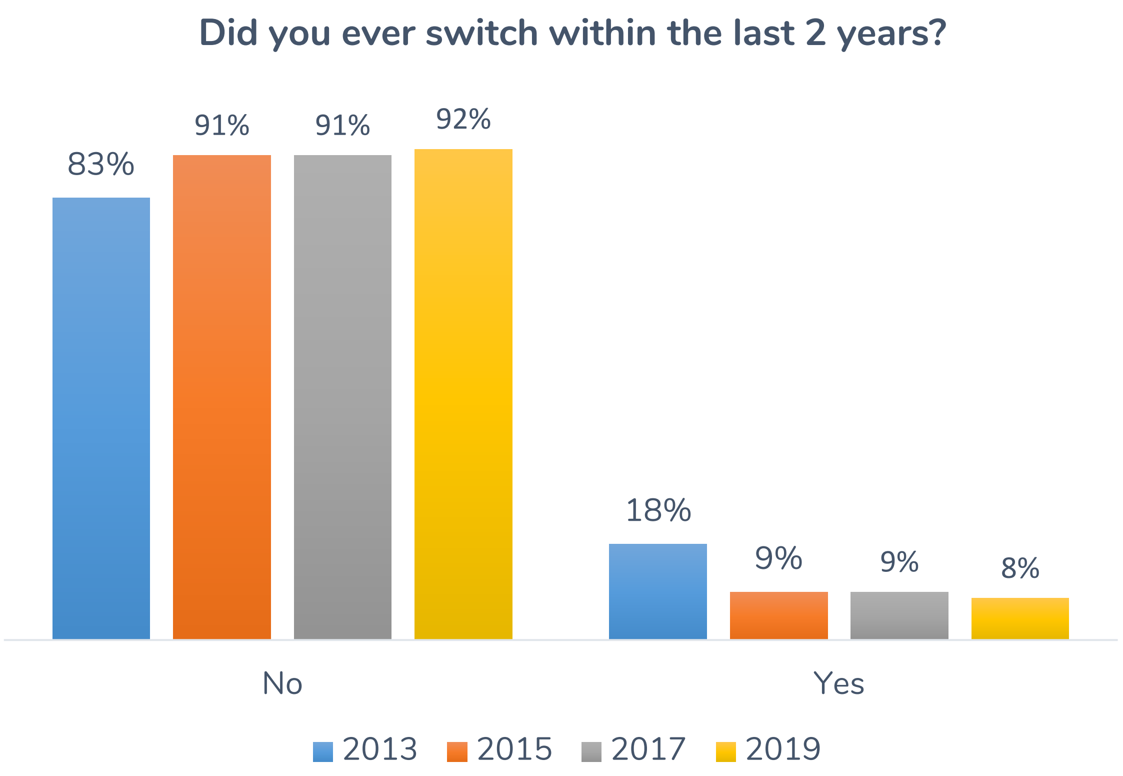
Would dissatisfied respondents switch operator?

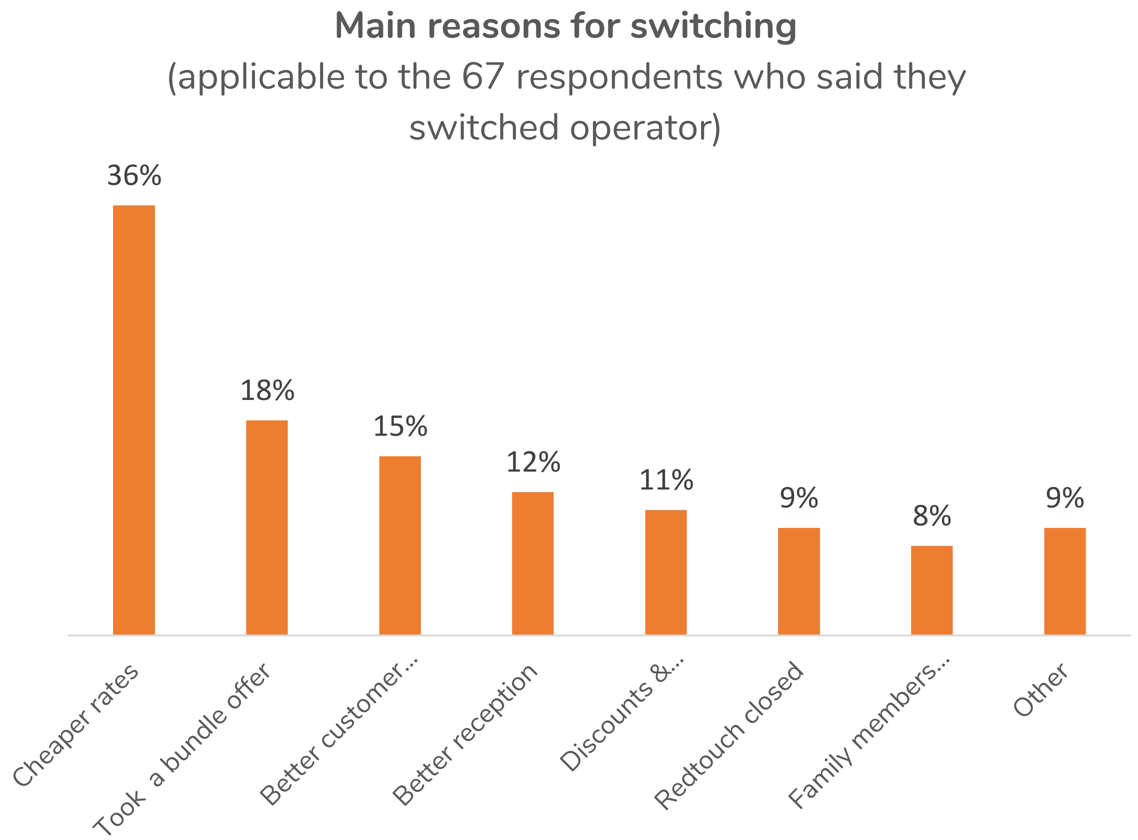


What stops dissatisfied respondents from switching?



Switching behaviour

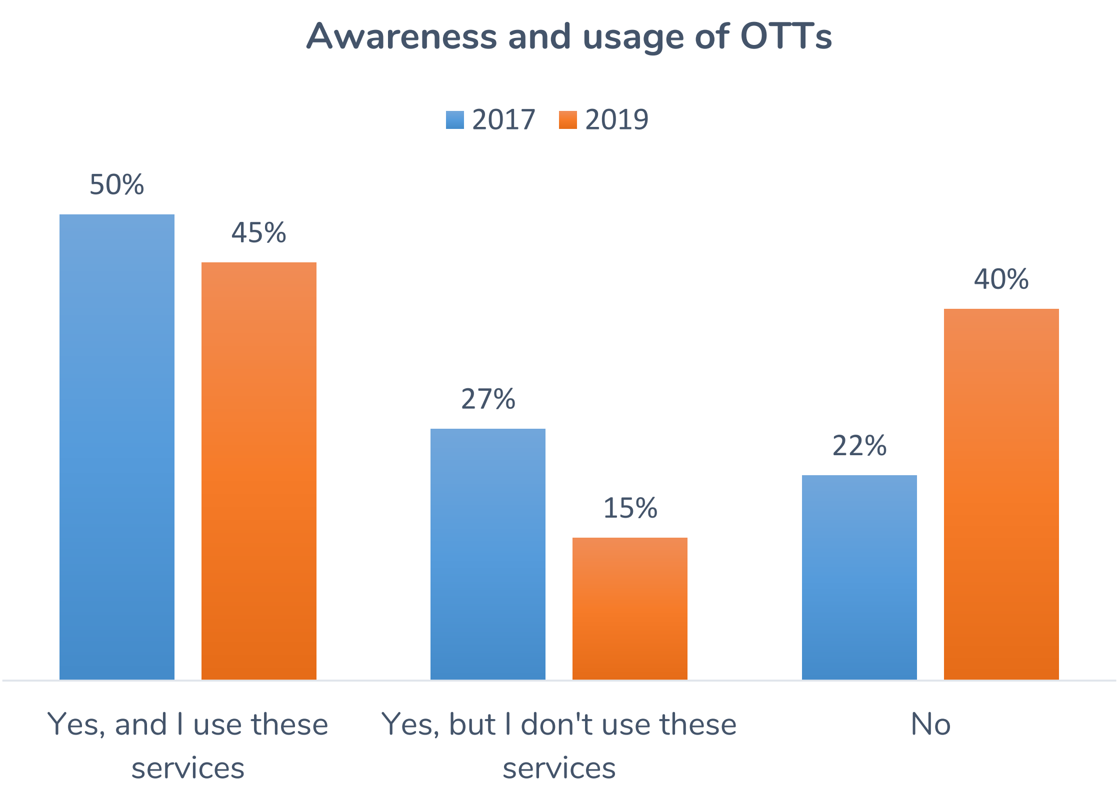


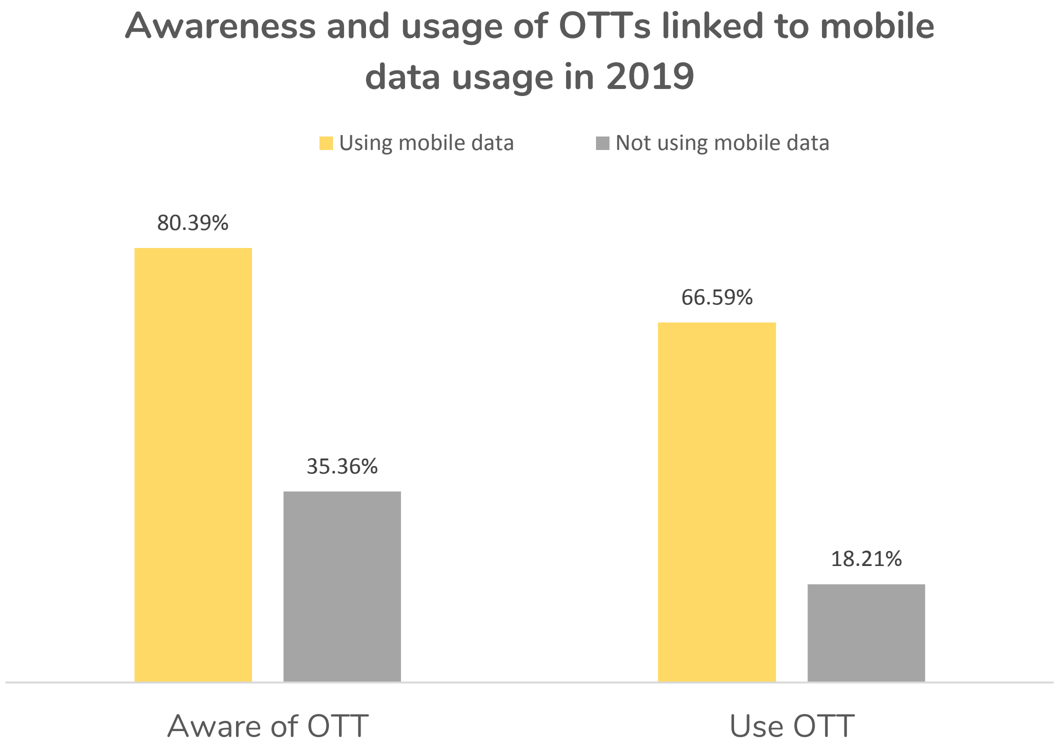


The majority of respondents did not switch service provider over the past 2 years. Among those that switched, 88% ported their number (79% in 2017) while the rest did not. Switching has not been deemed problematic by 92% of switchers.

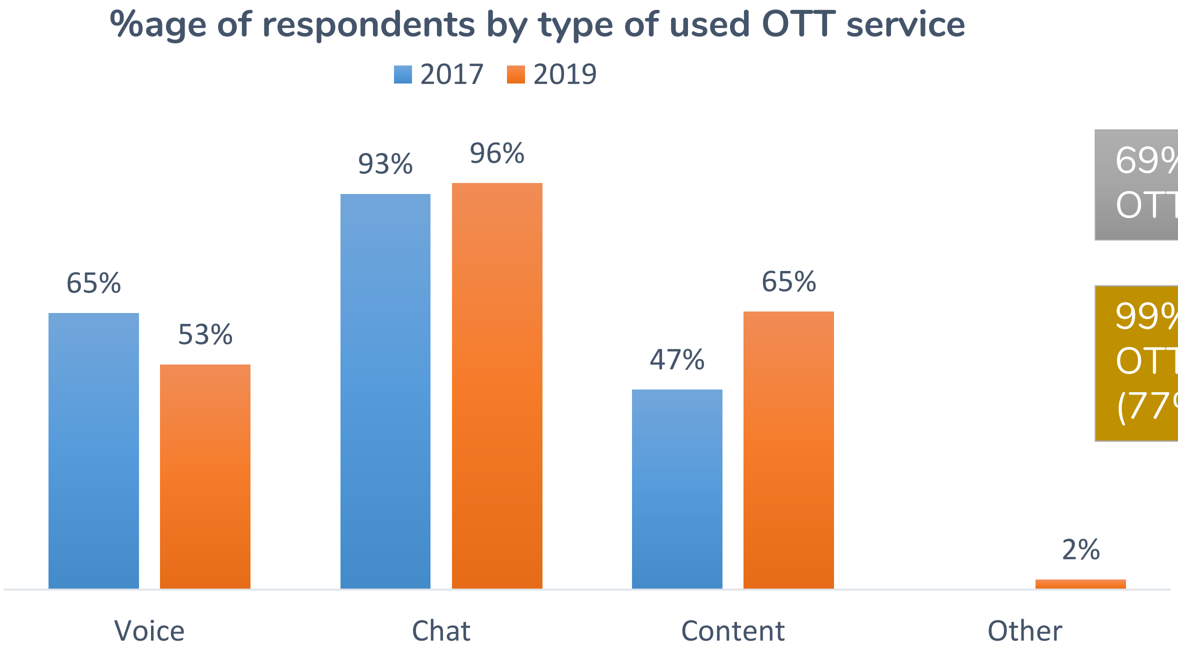
Usage of OTT services (1 of 3)

507 respondents say they are aware of OTT-based services, equivalent to 60.1% of all survey respondents. However, the number of respondents saying they actually use OTT services reaches 378, which is equivalent to almost 45% of all survey respondents.





Usage of OTT services (2 of 3)



69% of all survey respondents saying they make no use of OTT-based services are 50 years and older.

99% of all survey respondents saying they make use of OTT-based services are satisfied (22%) to very satisfied (77%) with quality of service.

Most commonly used voice app.

- Facebook messenger at 92% (-2pp. from previous study);
- Whatsapp at 84% (+6pp from previous study).

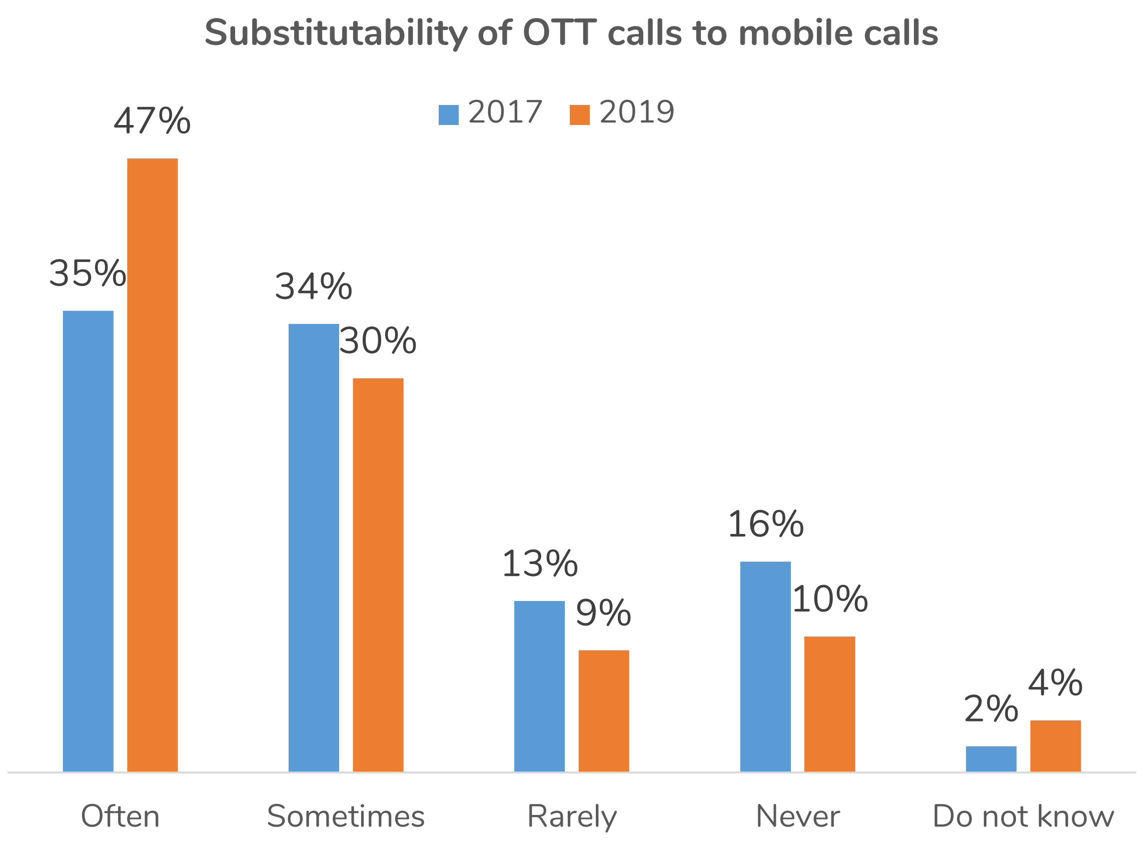
Most commonly used messaging app.

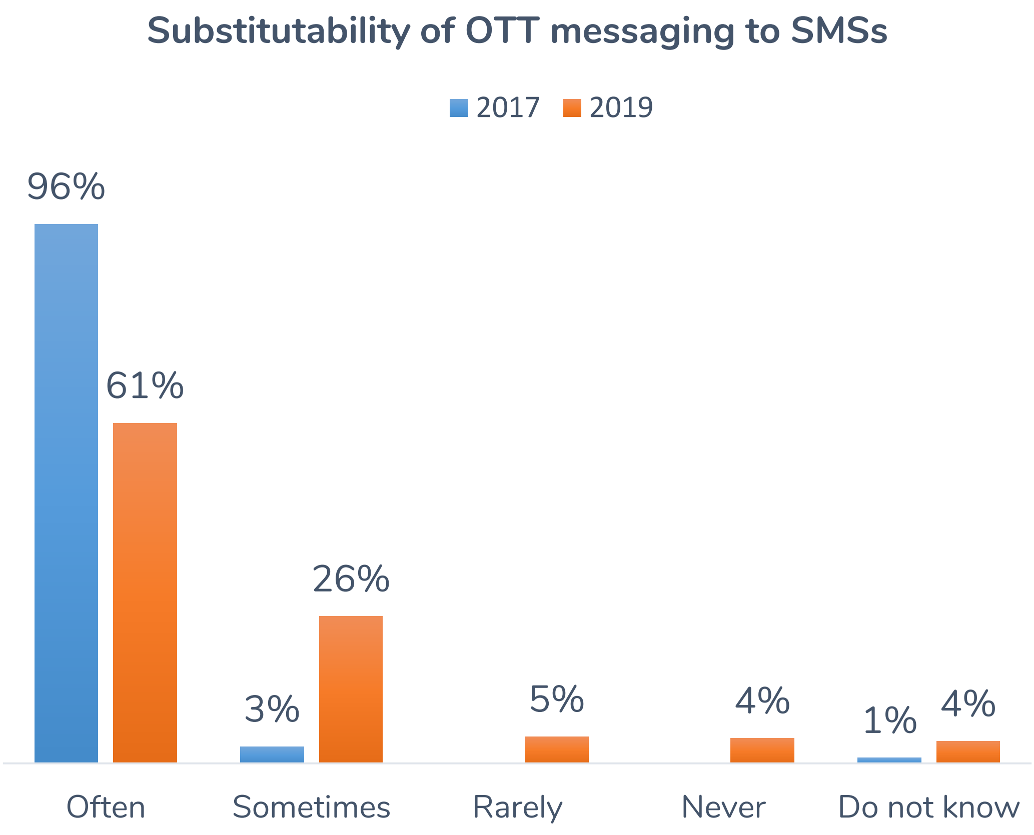
- Facebook messenger at 93% (+5 pp. from previous study)
- Whatsapp at 81% (-1pp. from previous study).

Most commonly used content app.

- Youtube at 85% (-4pp. from previous study);
- Instagram at 58% (+2pp. from previous study);
- Netflix at 33% (+23pp from previous study);
- Spotify at 32% (+2pp from previous study)

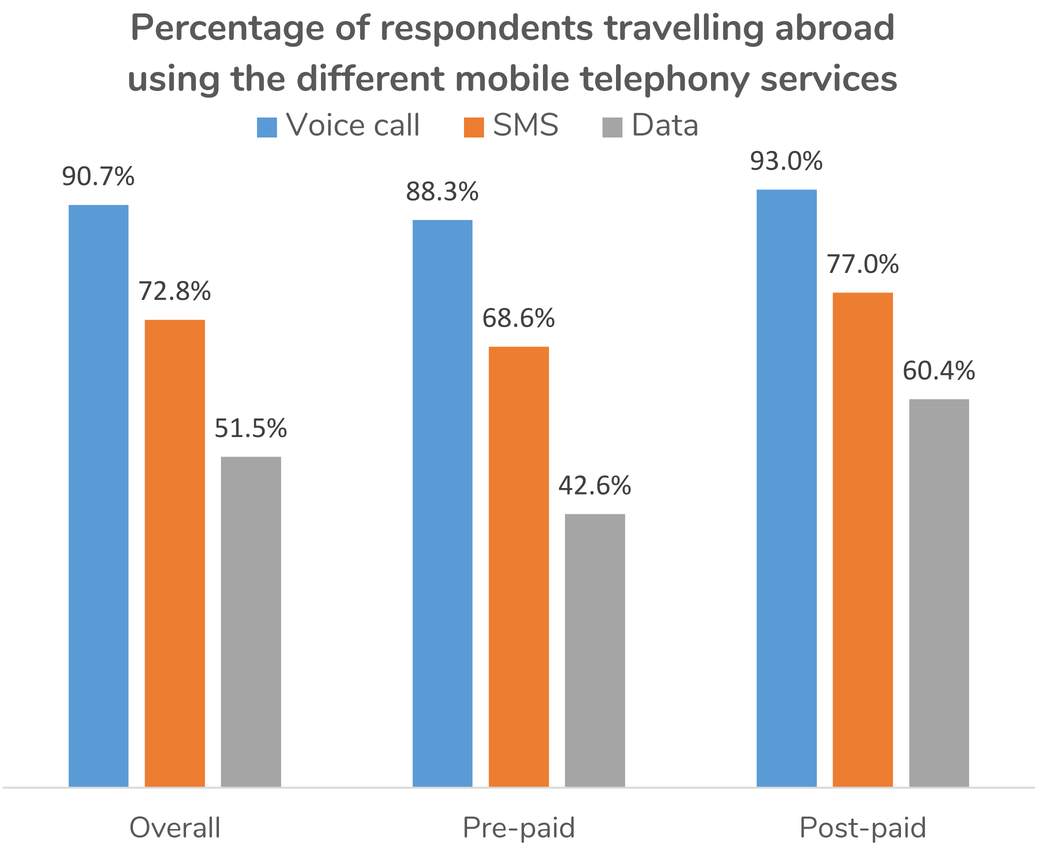
Usage of OTT services (3 of 3)

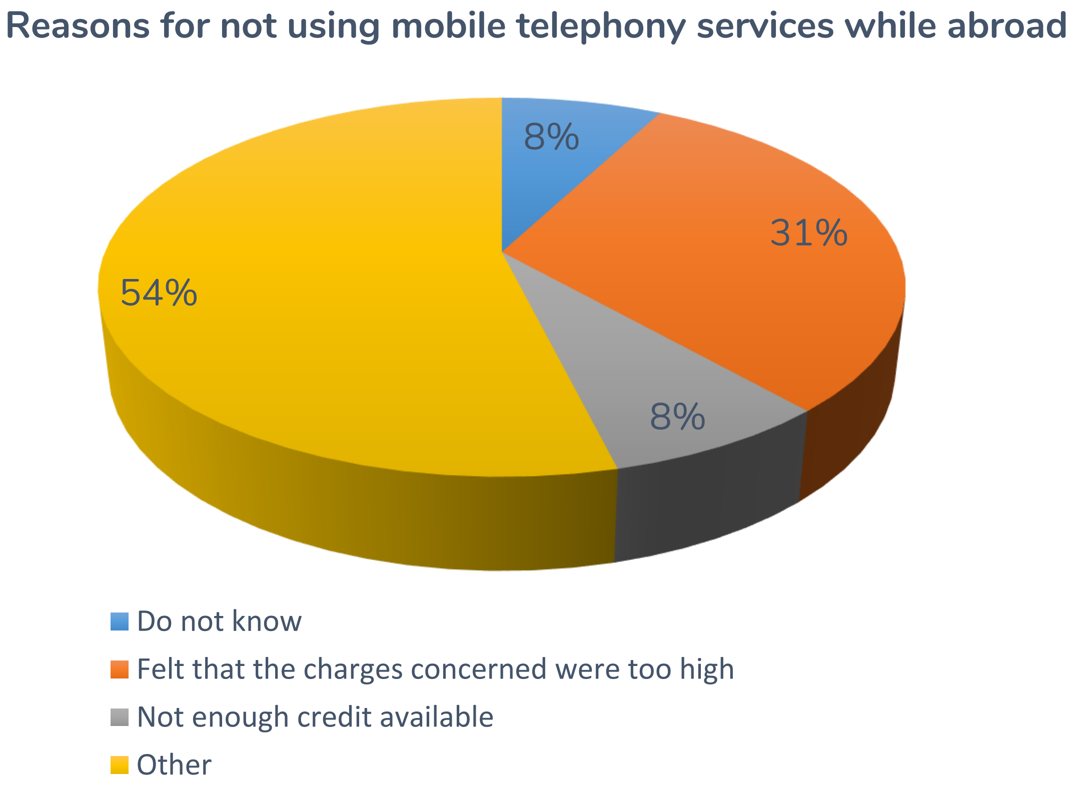




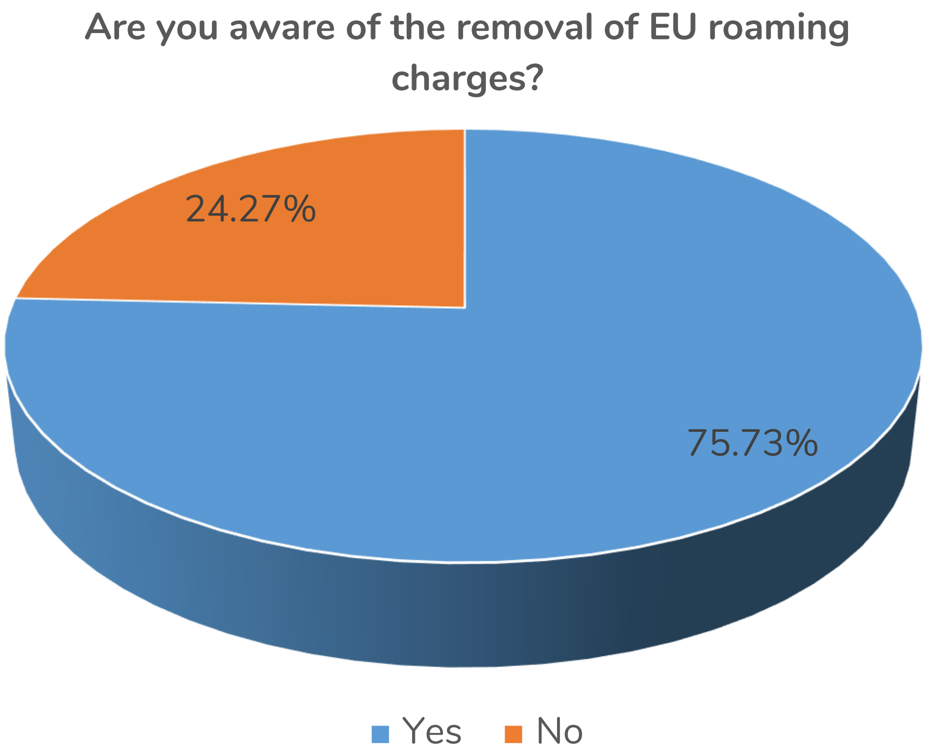
Roaming matters (1 of 2)

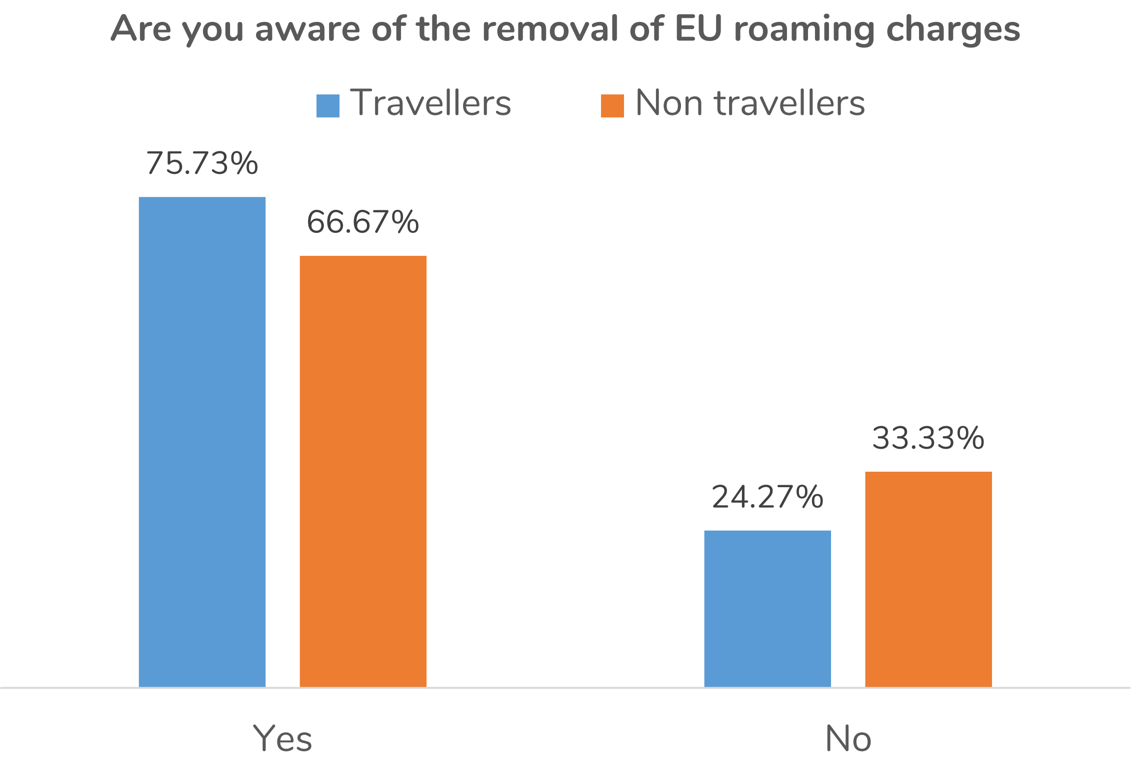
375 respondents say they have travelled abroad, equivalent to around 44% of all respondents with a mobile subscription. Just 3.8% of all 'travellers' say they have not used their mobile whilst travelling.





Roaming matters (2 of 2)





The survey highlights high awareness of the removal of the European roaming charges. 76% of respondents with a mobile subscription know of this change.

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Final remarks

- End-users increasingly valuing mobile data use and ready to spend more on their mobile telephony service to get access to such data. Hence the shift to post-paid plans.

- End-users remain very conscious that mobile data does not come cheap and jump to wifi as soon as the opportunity arises.

- An increasing share of end-users, particularly those on post-paid offers, are losing track as to the amount of money they are spending monthly. This is because more people are making use of direct debit facilities that are typically required with a post-paid subscription.

- The mobile telephony service is typically not bundled with other electronic communications services. Yet, end-users are reluctant to switch service provider, even when they are dissatisfied with the service.

- A big chunk of end-users are still wary of using mobile services whilst travelling, even in the EU, probably as they do not keep properly informed on the positive impact of the removal of EU roaming charges.

Thankyou

Malta Communications Authority
Valletta Waterfront, Pinto Wharf,
Floriana, FRN 1913, Malta

T + 356 2133 6840
F + 356 2133 6846

E info@mca.org.mt
W www.mca.org.mt