



MCA Market Research

Consumer perception survey: fixed broadband

November 2019

- The MCA Consumer Perception Surveys are carried out every two years to get insight on the preferences of household consumers when purchasing electronic communications services.
- This research informs us on:
 - ✓ the average monthly expenditure by end-users on fixed broadband services being purchased and price sensitivities;
 - ✓ the level of satisfaction with the quality of the services and the ability of users to switch between products;
 - ✓ the type of contract agreements that are selected and the quality of the operators' response to faults.

Keep tabs on fixed
broadband services in Malta

Provide for better analysis
of fixed broadband services

Provide for better
regulatory decisions

EMCS Ltd carried out survey fieldwork on June and July 2019

Fieldwork

- 20-minute phone interviews.
- 784 survey respondents selected randomly.
- Only one person per household interviewed, aged 18 and over.

Sample

- Target respondents stratified according to age composition of the Maltese population.
- Survey respondents distributed across Malta's geographical regions and socio economic categories of the Maltese population.

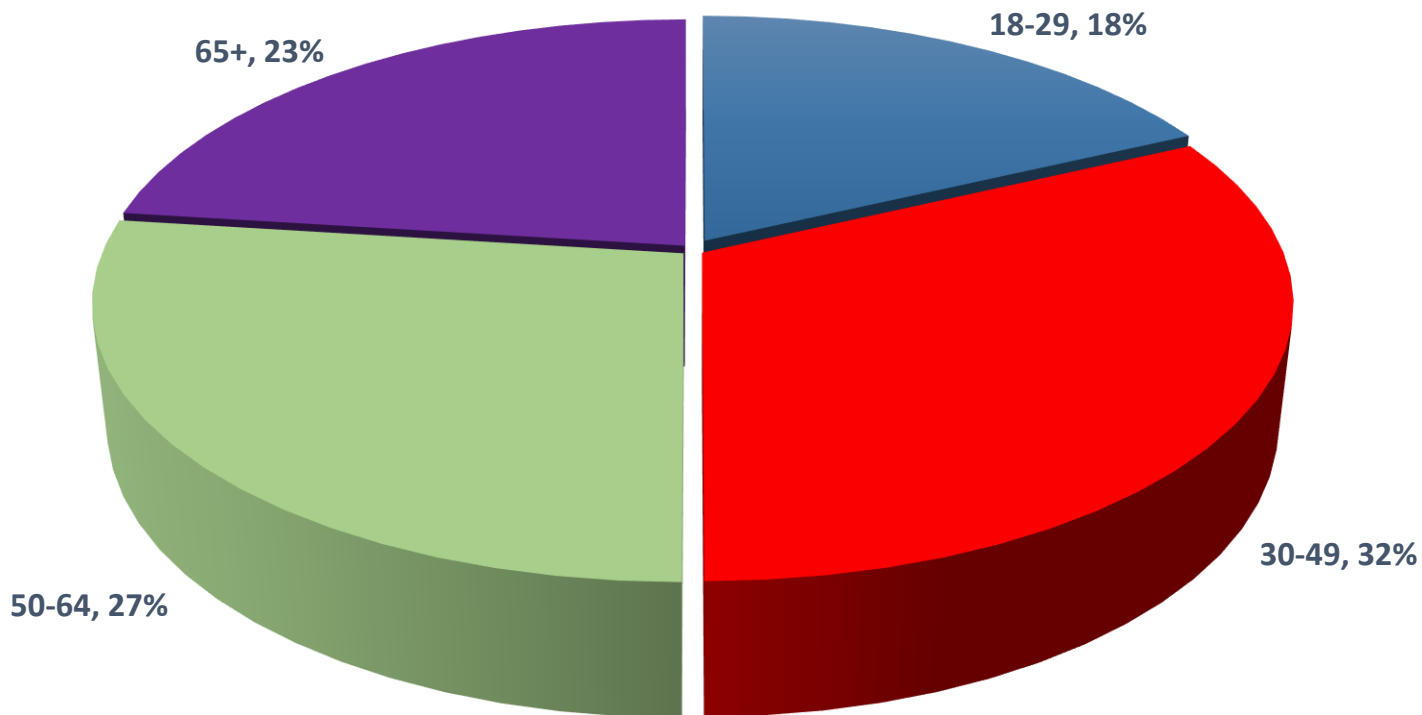
Responses

- 800 net respondents to the survey.
- Margin of error 4% at 95% confidence interval.

Methodology – Sample Distribution

Sample size distribution based on the age composition of the Maltese population (18 years or over)

Number of respondents - 800



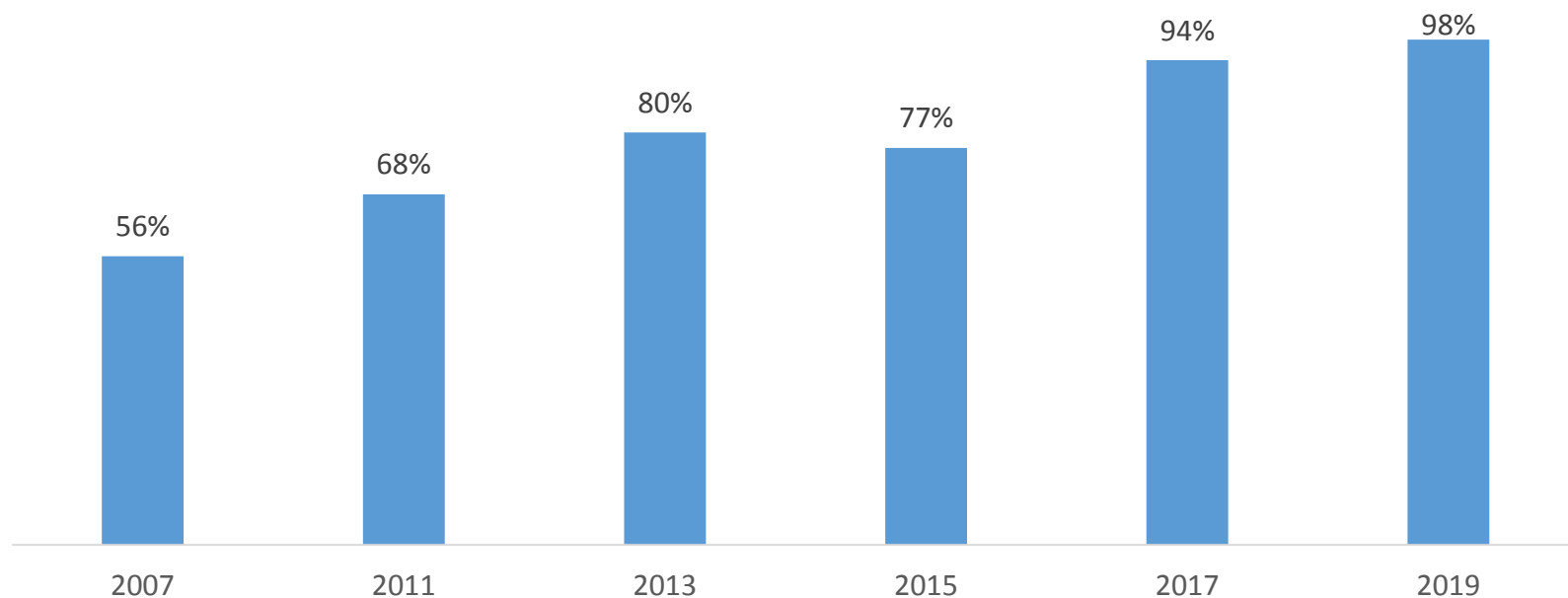


Access and Usage

Availability of fixed broadband in local households

Number of respondents with fixed broadband subscription – 784

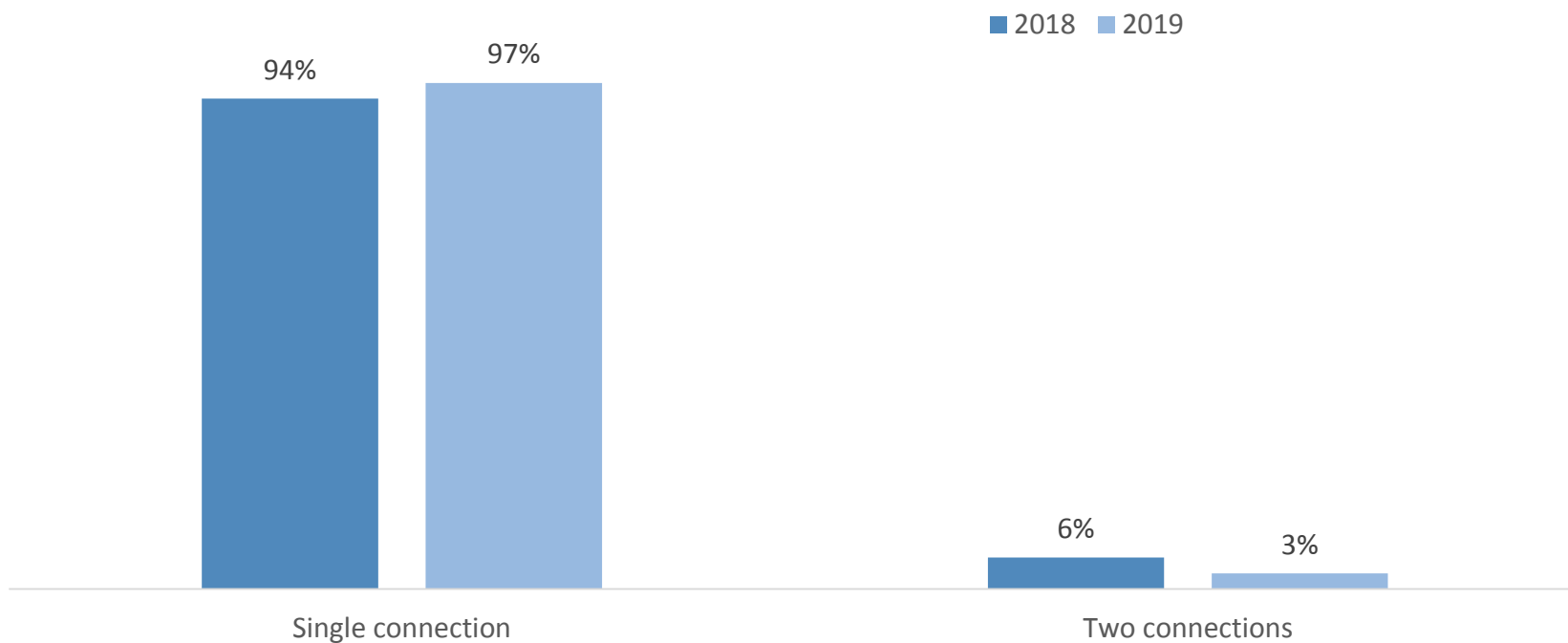
i.e. 98% of the total number of respondents



- Just 2% of respondents have no fixed broadband connection. The main reason quoted by respondents for not having a fixed broadband subscription was that they found the service to be too complicated.
- All of the respondents without a fixed broadband connection will not be purchasing the service within the next 6 months.

Number of connections at home

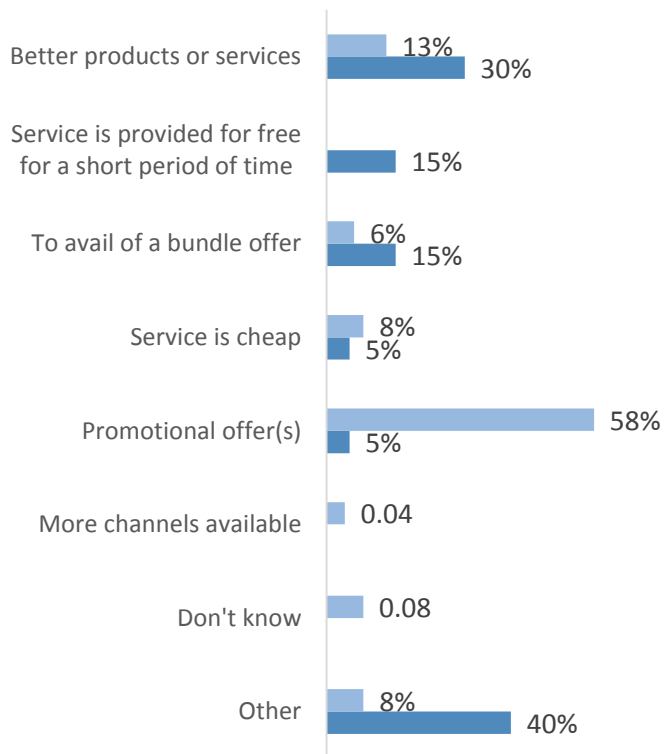
Number of respondents with a fixed broadband connection in their household - 784



Reasons for having multiple connections

Number of respondents with multiple subscriptions – 20
i.e. 3% of the total number of respondents

■ 2017 ■ 2019

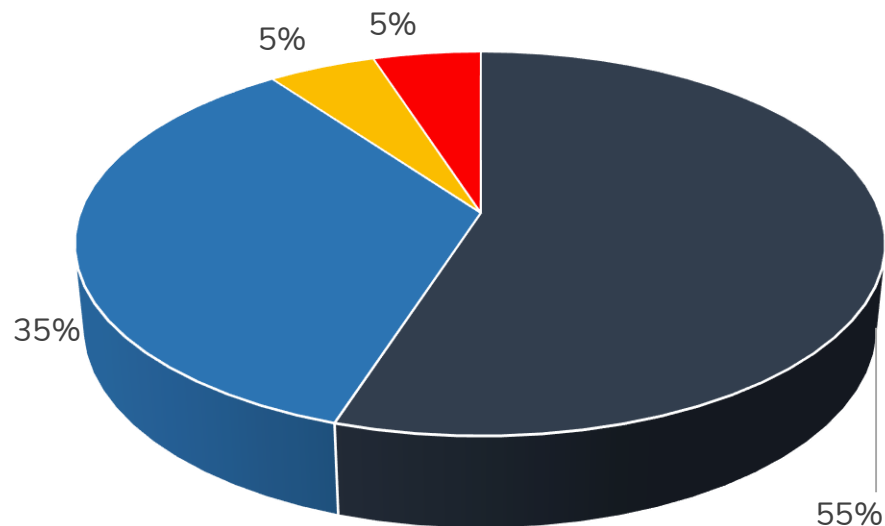


Access and usage (3)

(In case of more than one connection) Are you considering disconnecting one of the subscriptions over the next 12 months

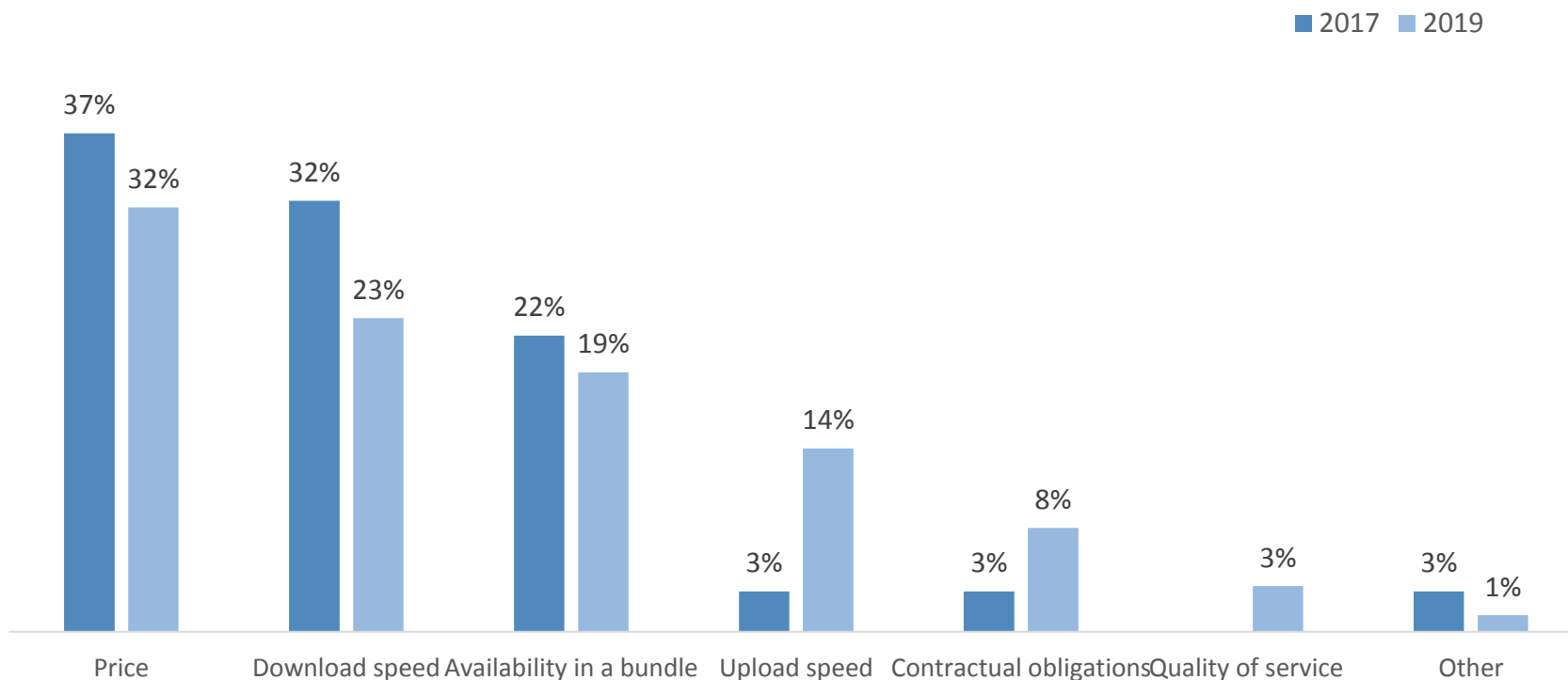
Number of respondents with multiple subscriptions – 20
i.e. 3% of the total number of respondents

■ No ■ Yes - Melita ■ Yes - GO ■ Yes - Vodafone (Malta)



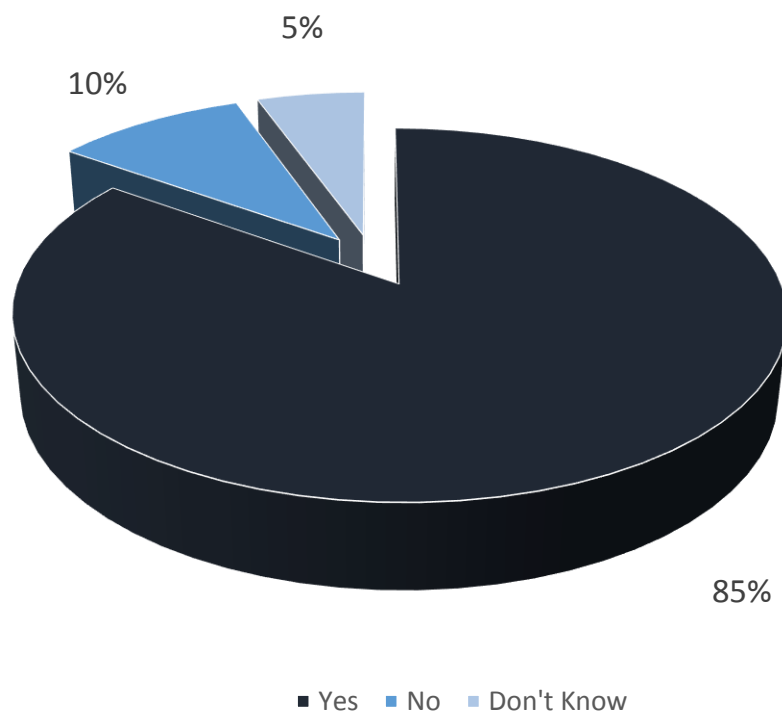
Features sought when determining which fixed broadband connection to purchase (ranked in order of importance)

Number of respondents with a fixed broadband connection in their household – 784



Propensity to purchase fixed broadband in a bundle

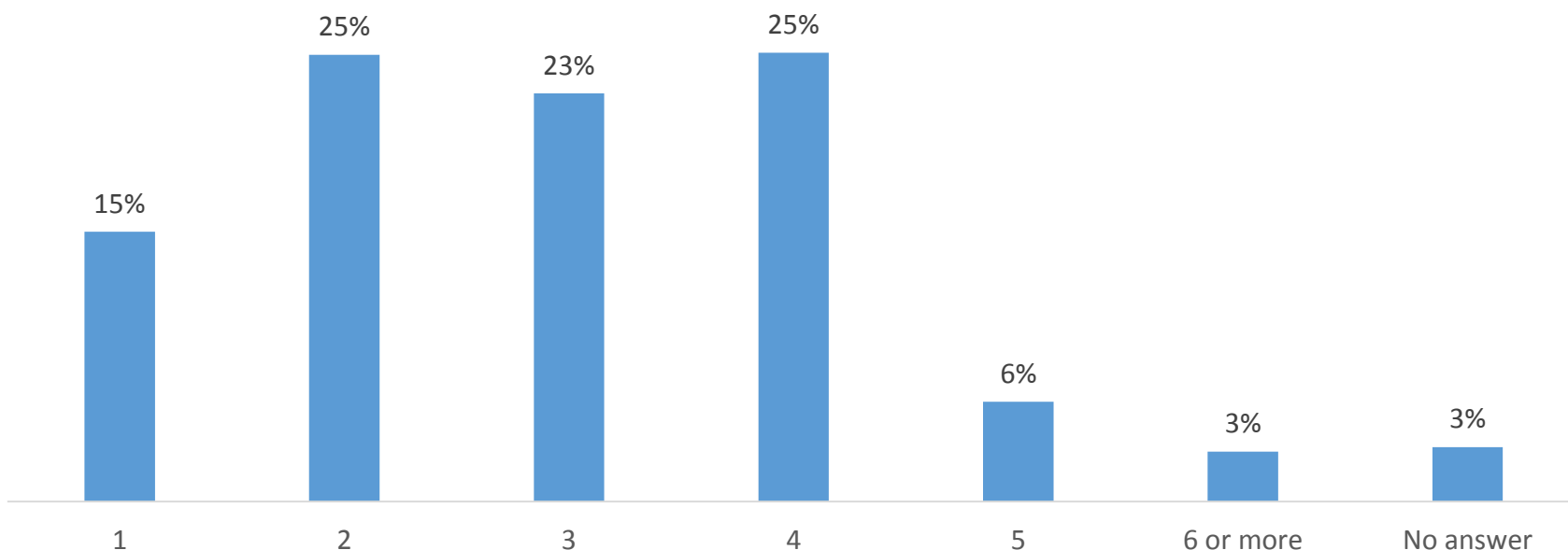
Number of respondents with a fixed broadband connection in their household – 784



Access and usage (6)

Number of people making use of their fixed broadband in a household

Number of respondents with a fixed broadband connection – 784

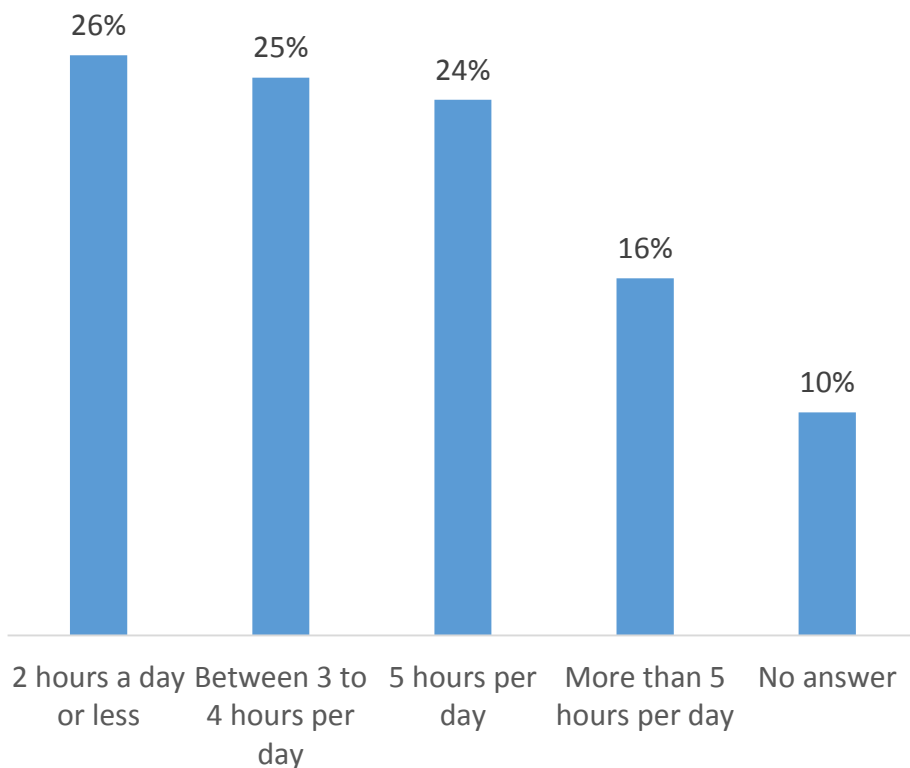


- In some instances more users than household members were reported by respondents, in view of visitors to the household regularly and making regular use of the internet.
- 24 respondents did not indicate the number of people who used internet in their household.

Average time spent online per day by household members under the age of 18

Number of respondents with a family member under 18 years of age making use of a fixed broadband connection – 215

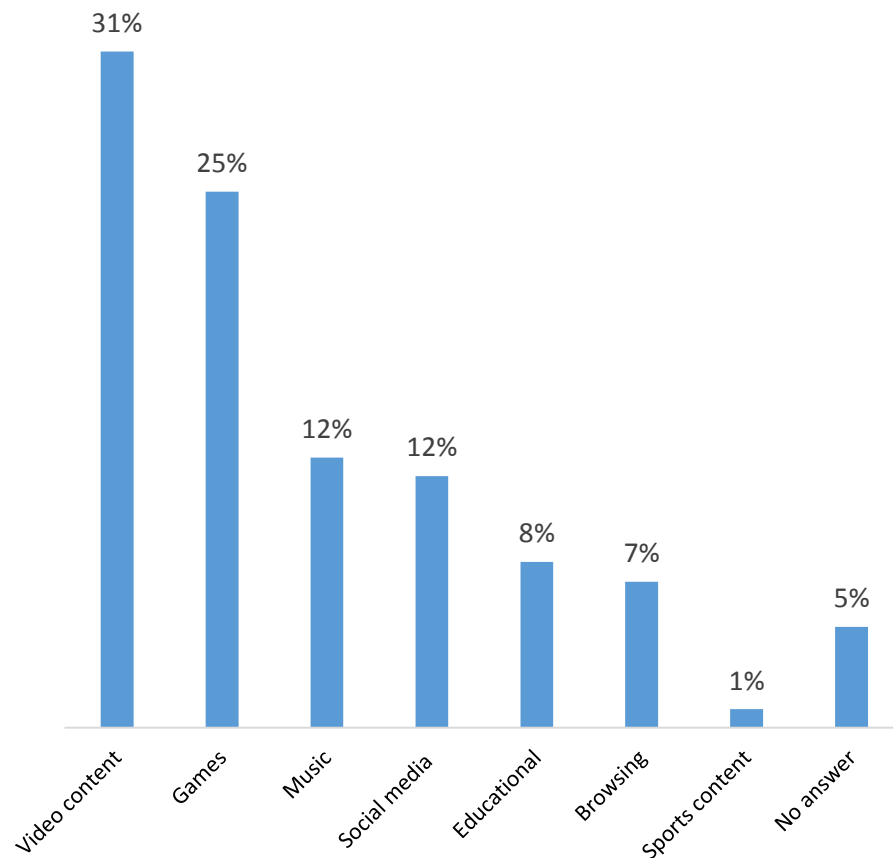
i.e. 27% of the total number of respondents



Access and usage (7)

Online activities engaged on by household members under the age of 18

Note: respondents can give more than one reply



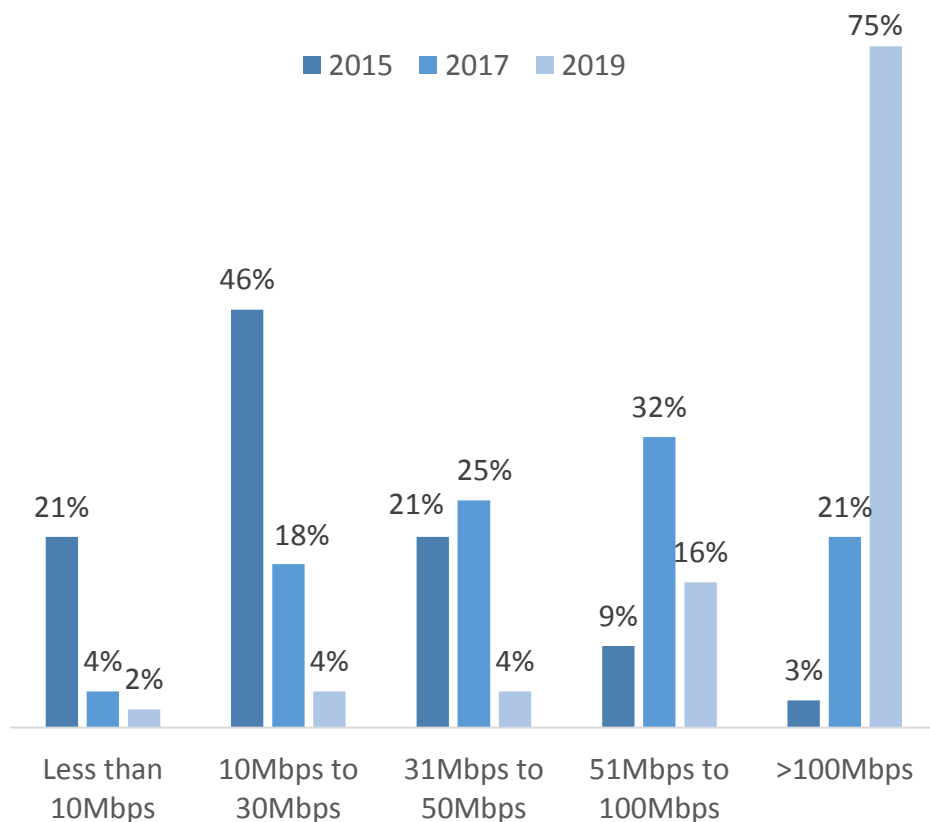


Download speed and technology

Download speed and technology (1)

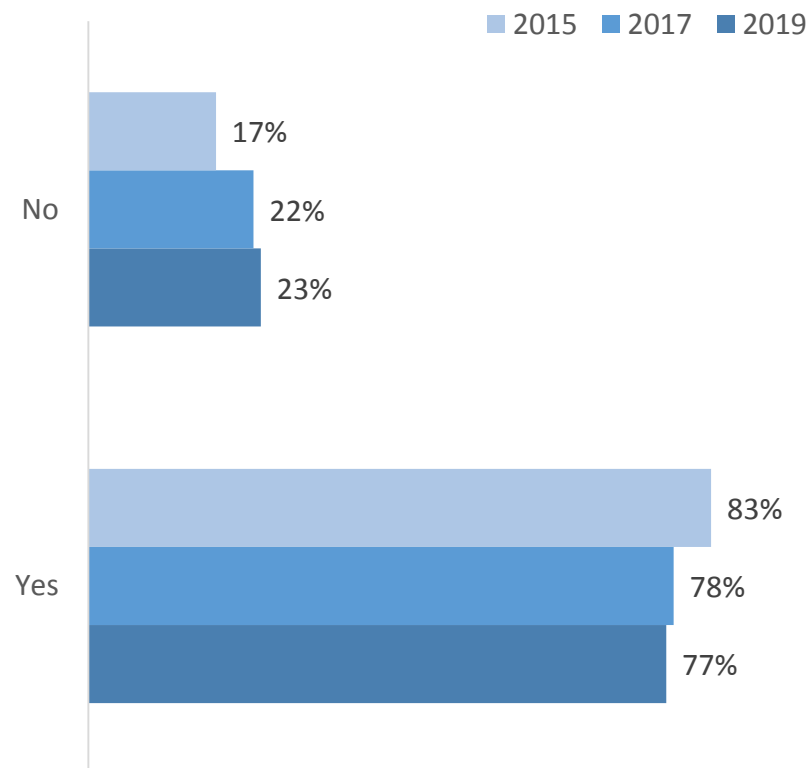
Type of purchase by download speed

Number of respondents knowing their download speed of their broadband connection – 200
i.e. 26% of the total number of respondents



Perceived adequacy of download speeds

Number of respondents with a fixed broadband connection - 784

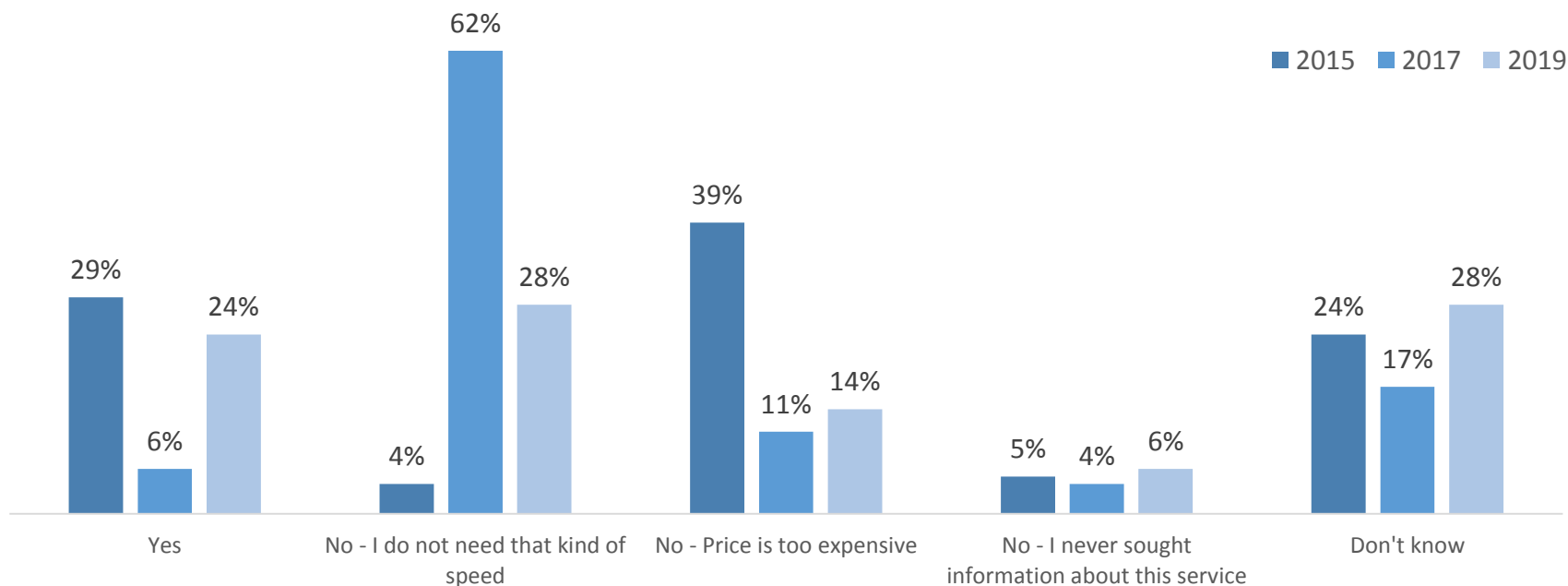


Download speed and technology (2)

Possibility of upgrading existing connection to ultra fast download speeds (i.e. download speeds of 100Mbps or more) in the next 12 months

Number of respondents knowing their download speed and having a connection less than 100Mbps their broadband connection – 50

i.e. 25% of the total number of respondents

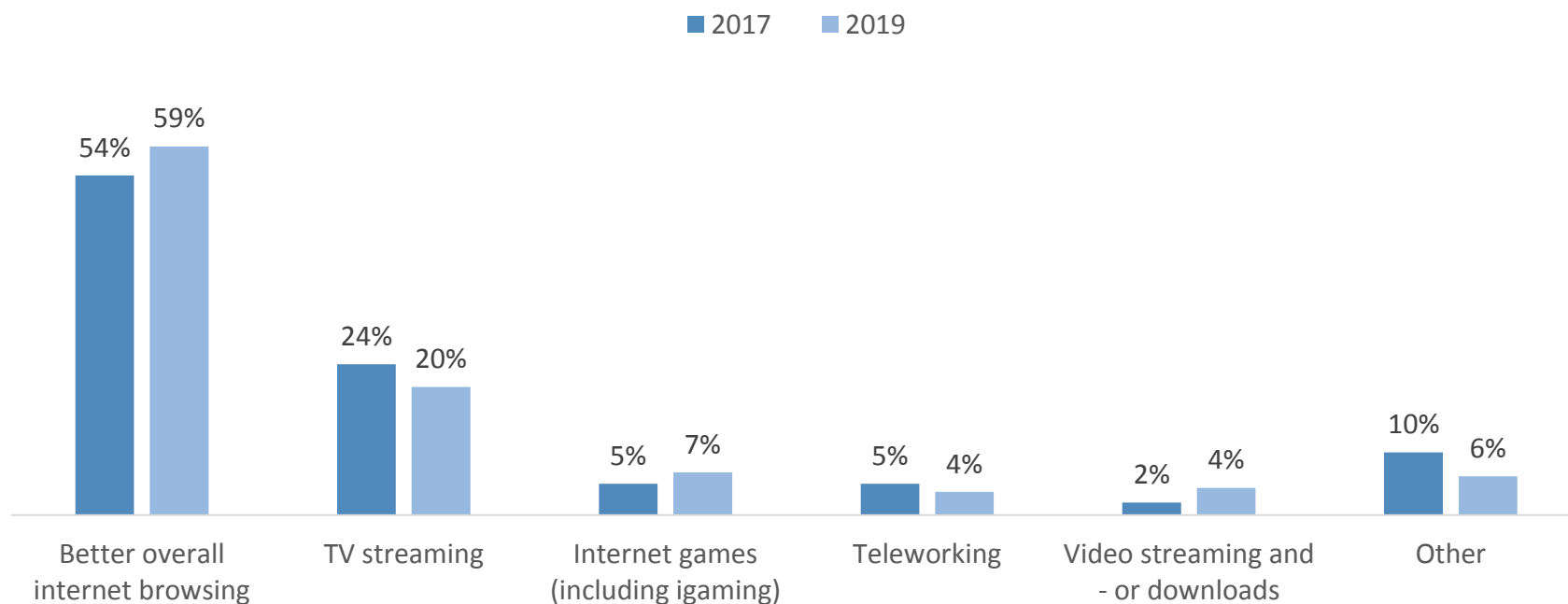


Among this cluster, 24% indicated the possibility of upgrading their existing connection to ultra fast download speeds. A considerable increase over the previous survey (then 7%).

Download speed and technology (3)

Reasons for acquiring a broadband connection of 100Mbps or more

Number of respondents with a fixed broadband connection supporting a download speed of 100Mbps or more – 150
i.e. 75% of the number of respondents having a fixed broadband connection and knowing their download speeds



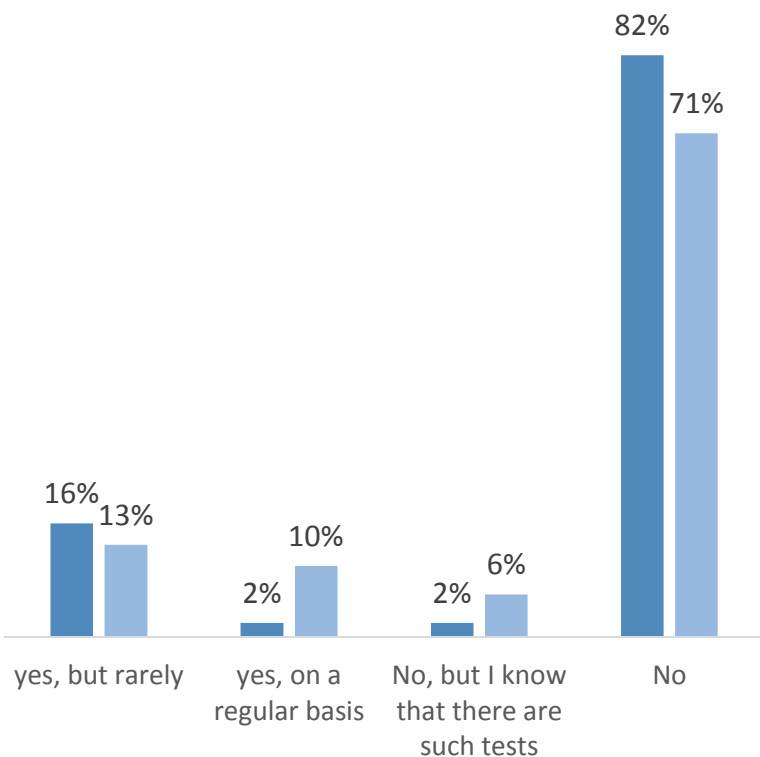
The primary reason individuals opt for a broadband connection of 100Mbps or more relates to 'better overall internet browsing' (59%). This was also the main reason identified under the previous study.

Download speed and technology (4)

Propensity to test download speed

Number of respondents with a fixed broadband connection - 784

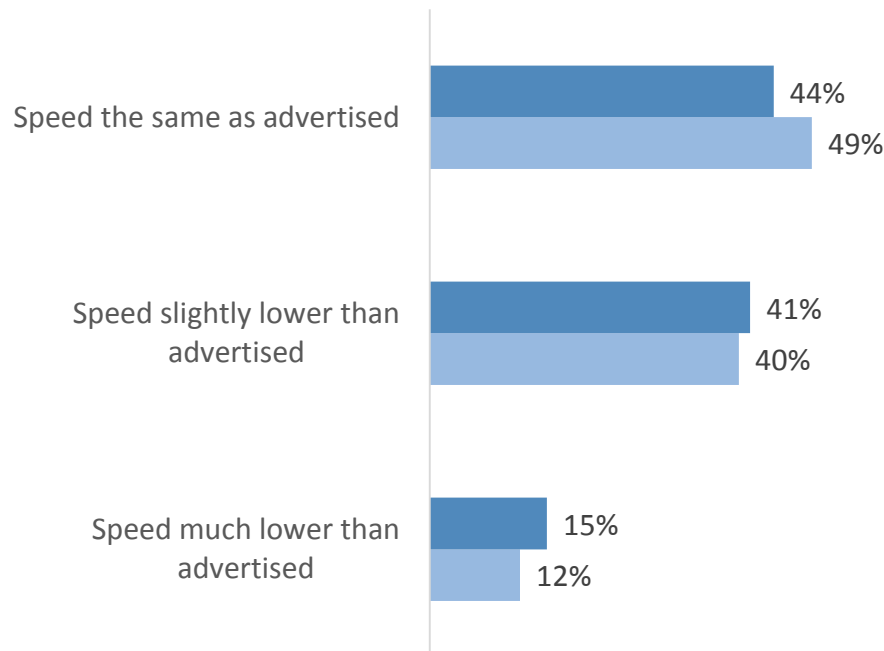
■ 2017 ■ 2019



Outcome of download speed tests

Number of respondents who have performed speed tests on their fixed broadband connection – 182
i.e. 23% of the total number of respondents

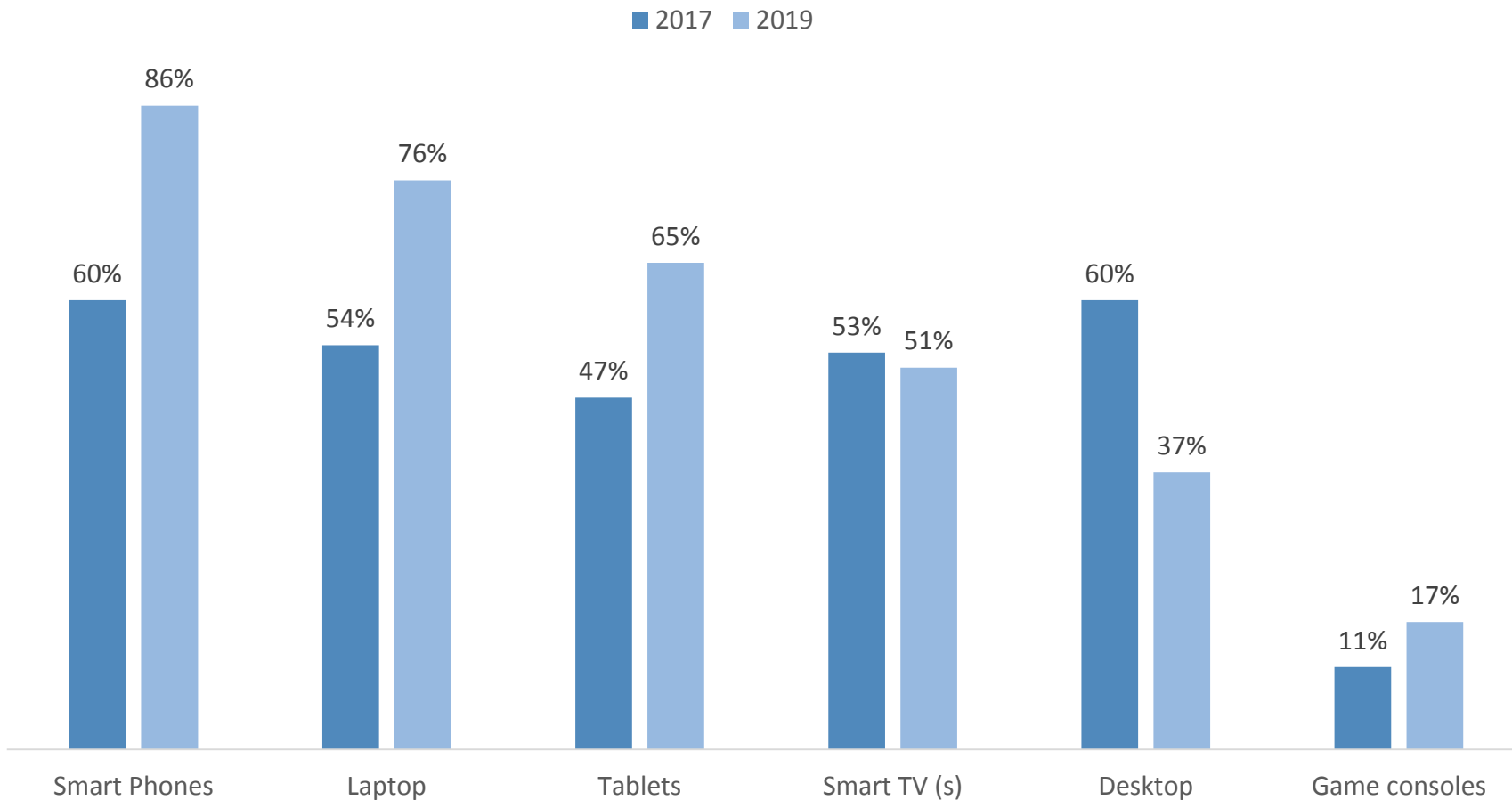
■ 2017 ■ 2019



Download speed and technology (5)

Type of devices connected to a fixed broadband connection within a household – 784

Note: respondents can give more than one reply



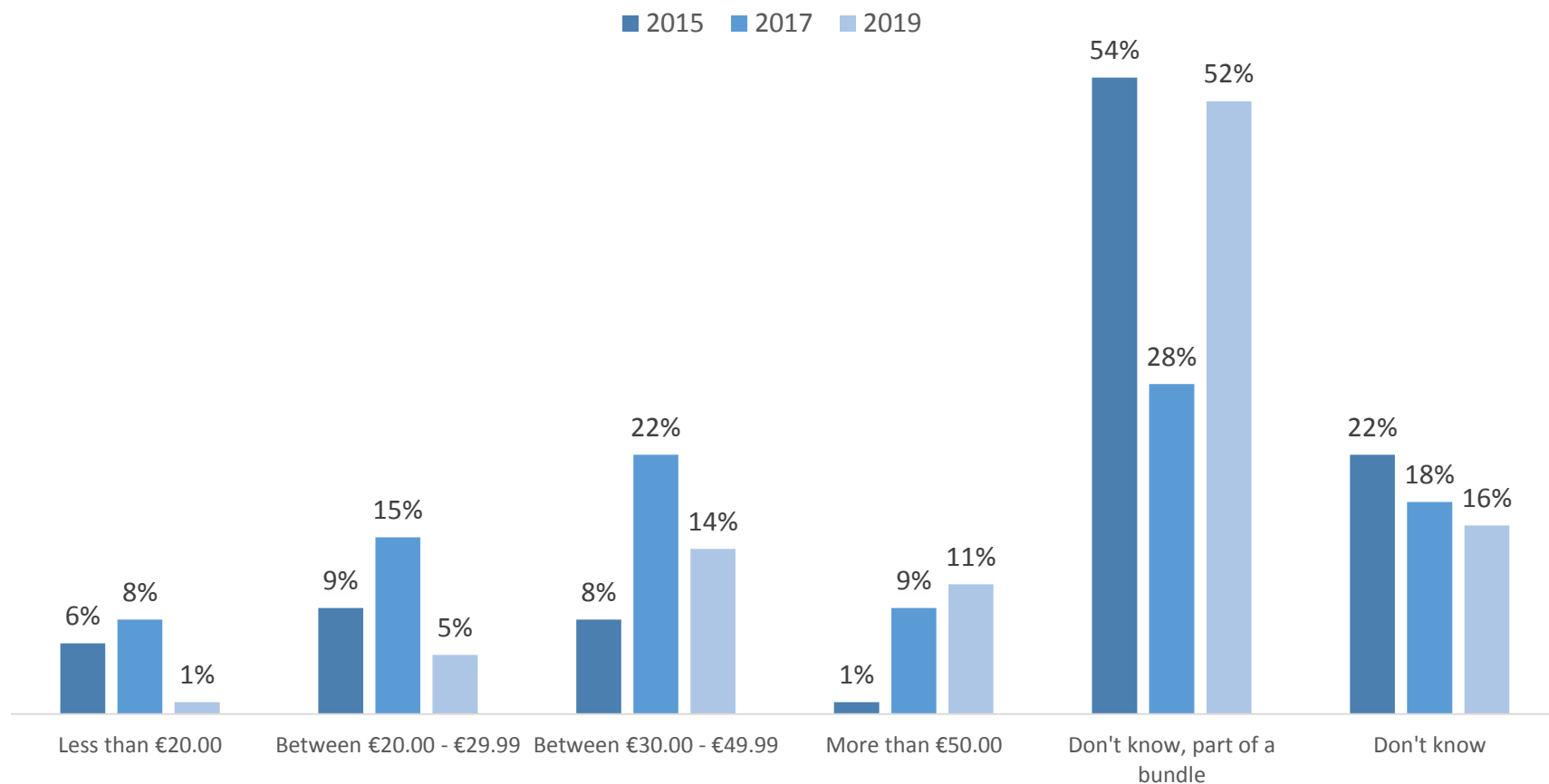


Expenditure, quality of service and switching

Expenditure, quality of service and switching (1)

Average monthly expenditure on a fixed broadband connection

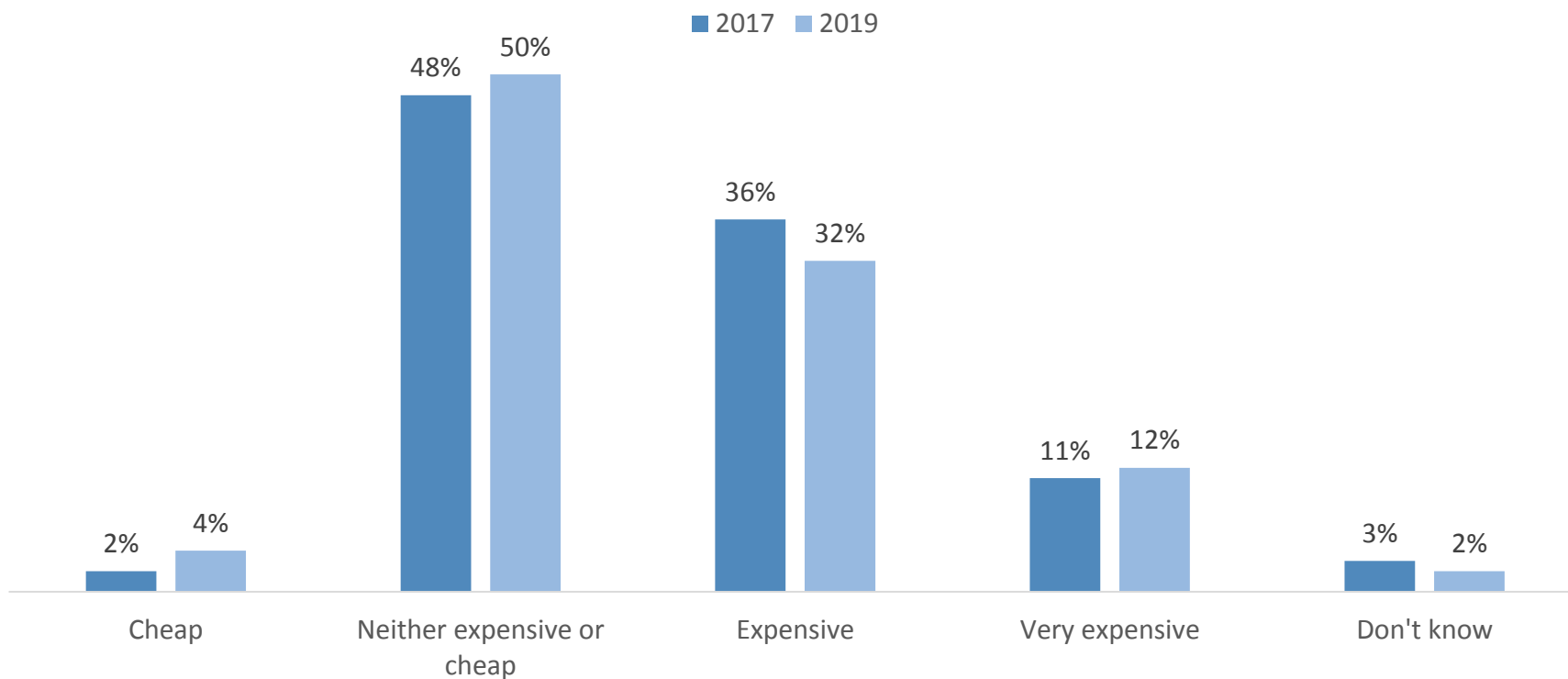
Number of respondents with a fixed broadband connection and knowing their monthly expenditure – 251
i.e. 32% of respondents having a fixed broadband connection at home



Expenditure, quality of service and switching (2)

Perceptions of the cost of fixed broadband connection

Number of respondents with a fixed broadband connection and knowing their monthly expenditure – 251
i.e. 32% of respondents having a fixed broadband connection at home



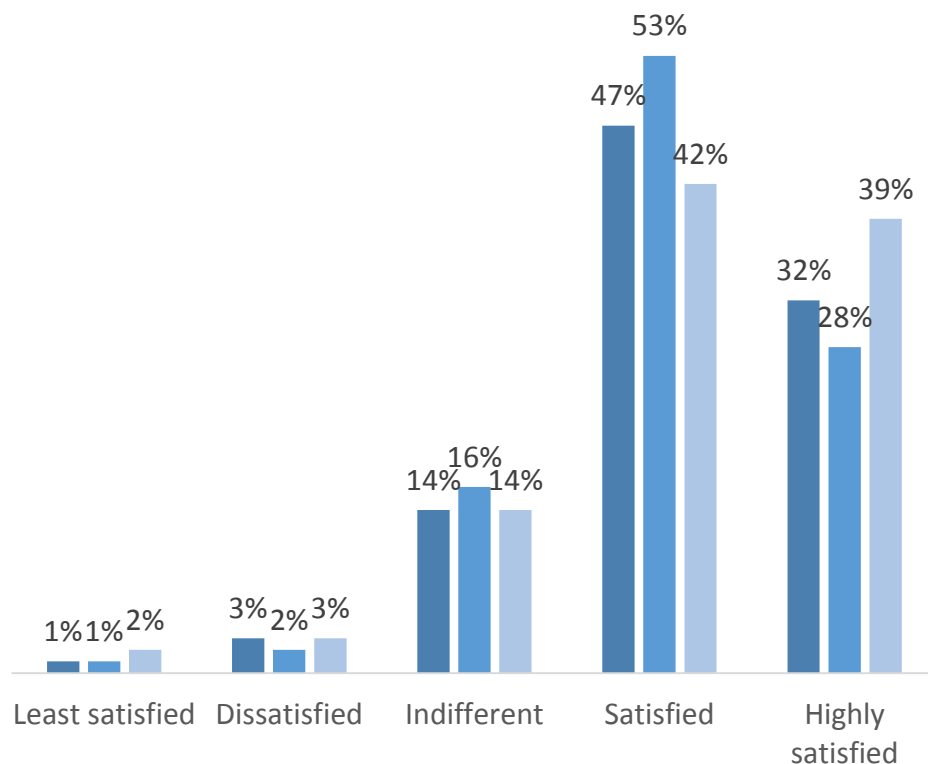
44% of respondents that know their monthly expenditure feel that the service is expensive.

Expenditure, quality of service and switching (3)

Perceived satisfaction with main fixed broadband connection

Number of respondents with a fixed broadband connection – 784

■ 2015 ■ 2017 ■ 2019

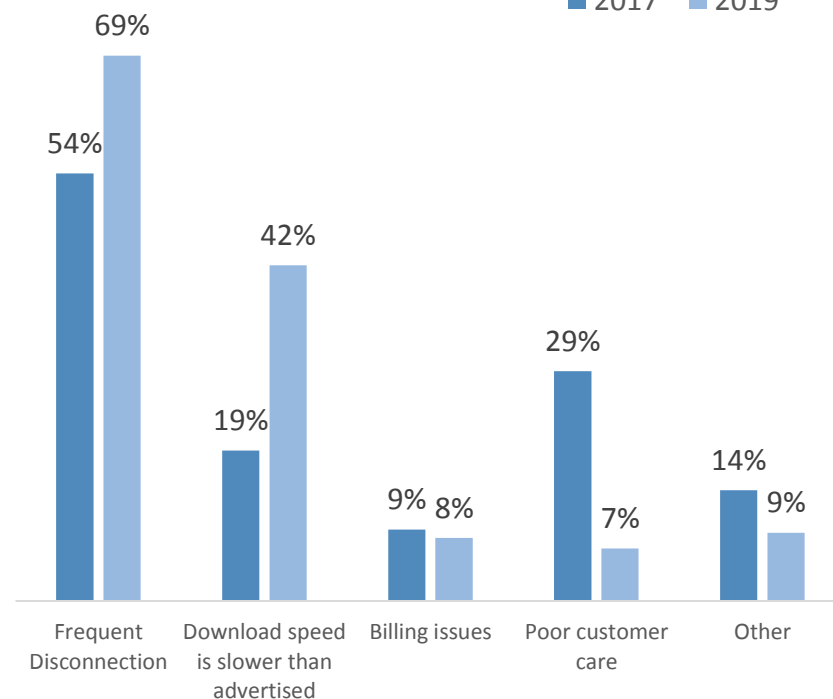


Reasons quoted for not being satisfied or indifferent with the service

Number of respondents perceiving their connection to be unsatisfactory/indifferent – 151

i.e. 19% of total number of respondents having a fixed broadband connection at home

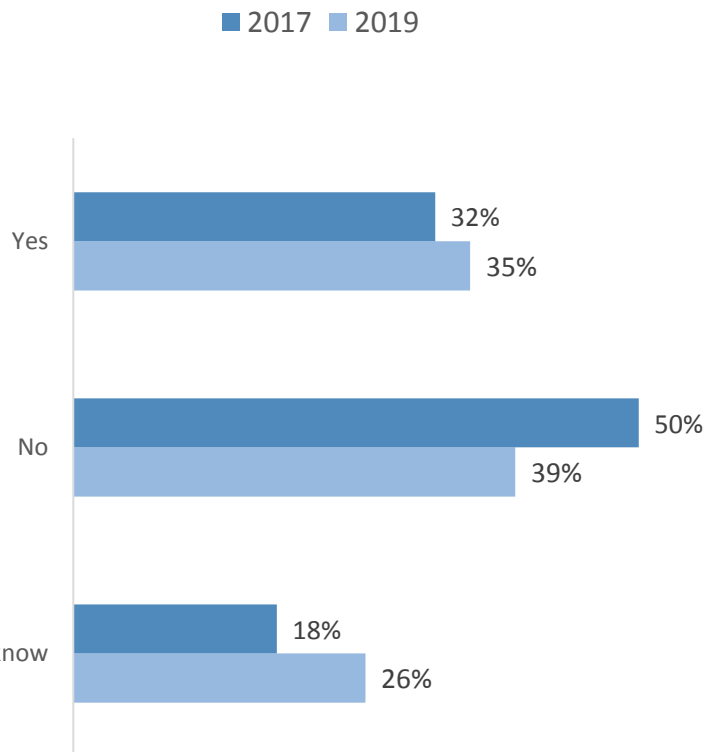
■ 2017 ■ 2019



Expenditure, quality of service and switching (4)

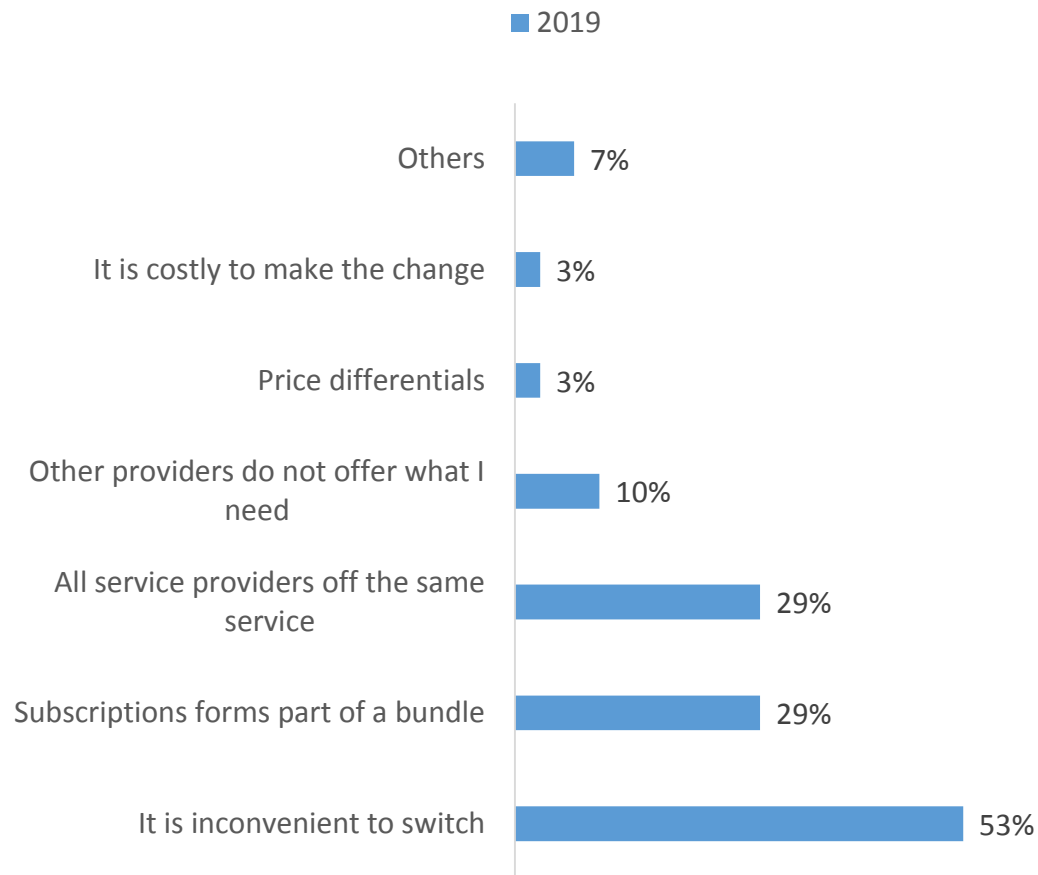
Switching consideration of respondents dissatisfied or indifferent with the quality of service

Number of respondents – 151



Reasons for not switching

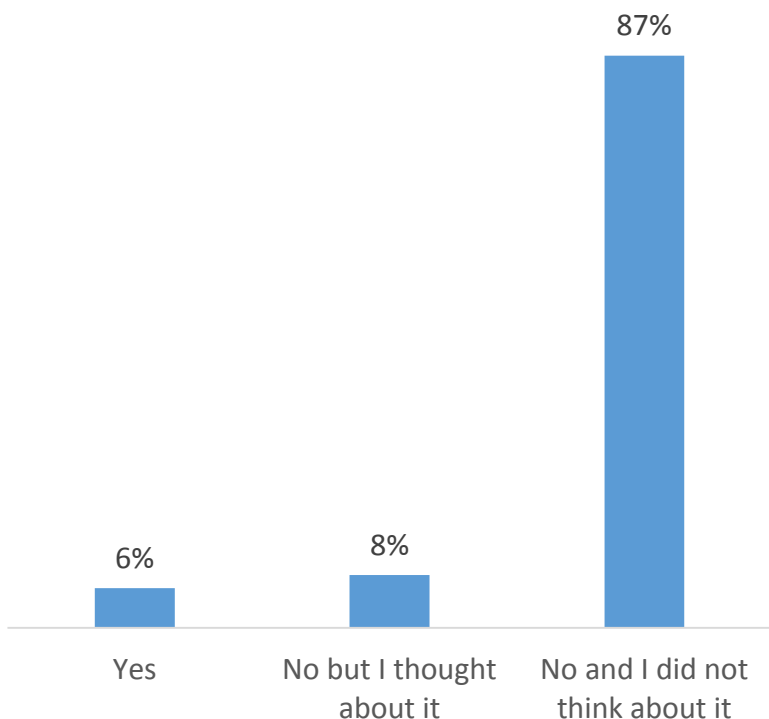
Number of respondents not considering switching – 59
i.e. 39%; respondents could give multiple answers



Expenditure, quality of service and switching (5)

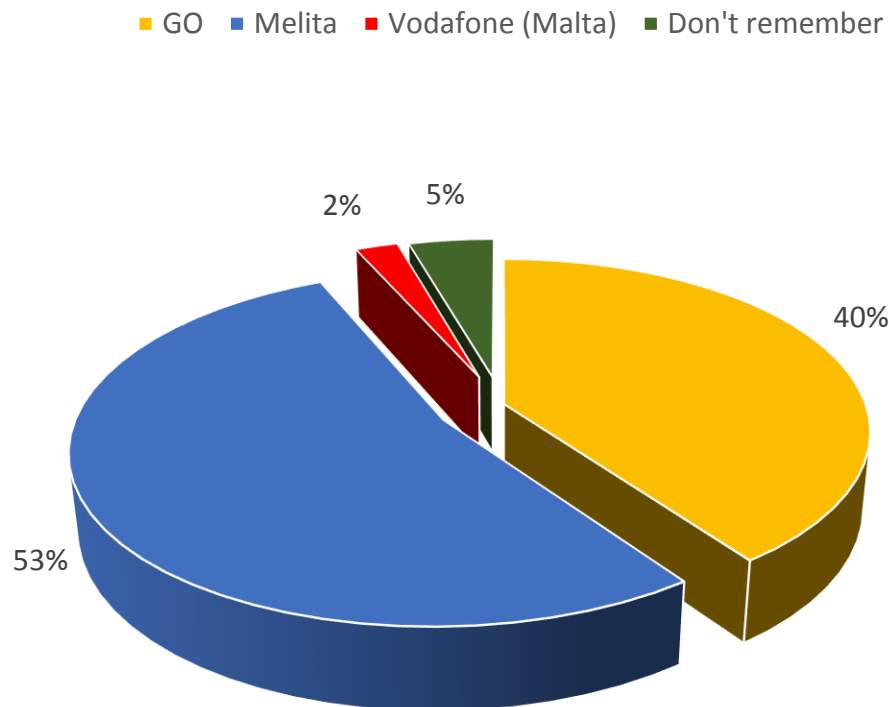
Switching behavior in the last two years

Number of respondents – 784



Operators that respondents were subscribed to before switching

Number of respondents – 45



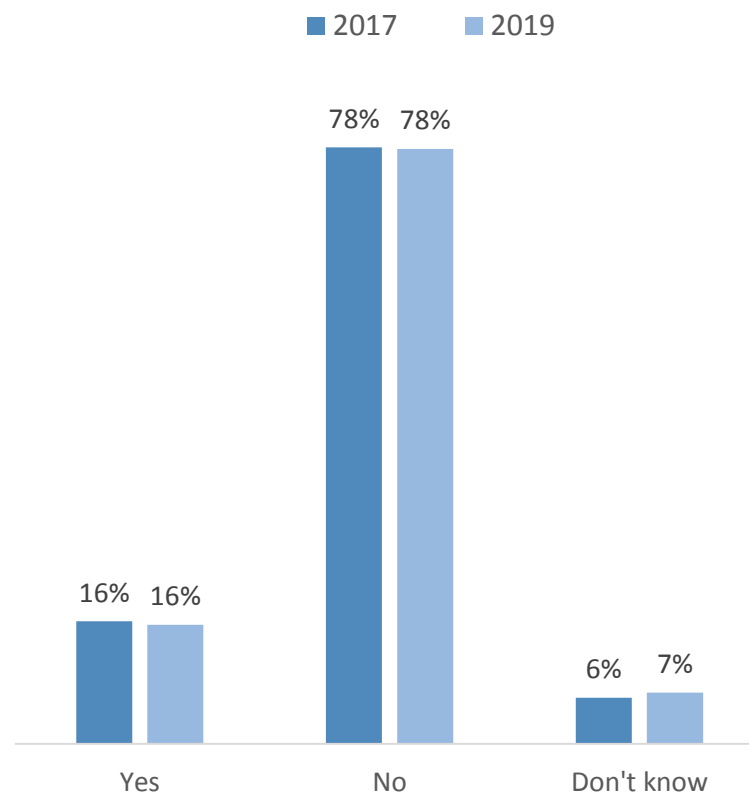
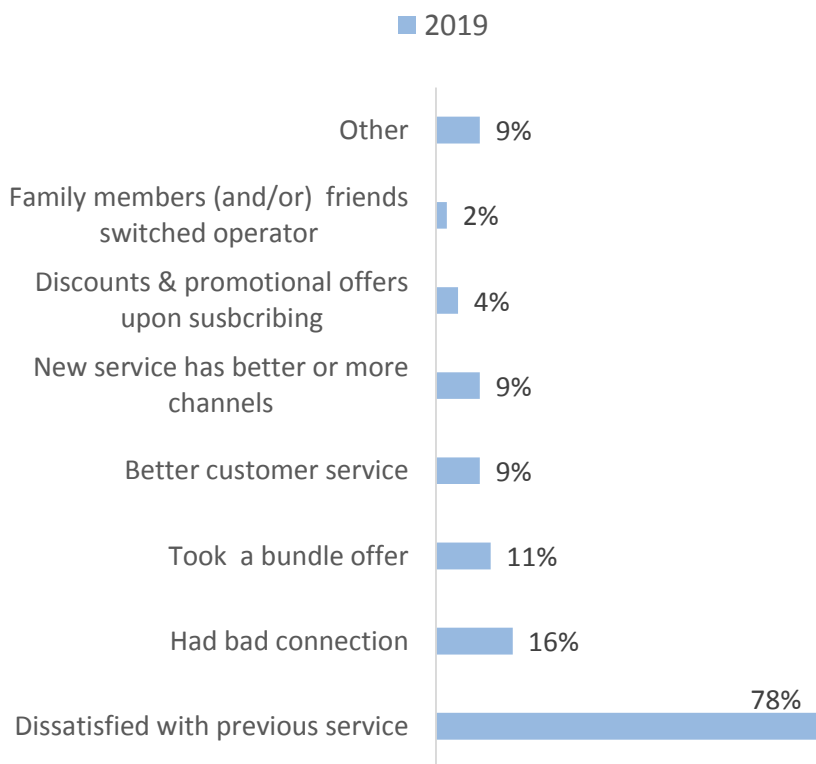
Expenditure, quality of service and switching (6)

Reasons for switching service provider

Respondents that found difficulty to switch

Number of respondents that have switched service providers in the last 2 years – 45

i.e. 6% of the number of respondents having a fixed broadband connection (respondents could give multiple answers)

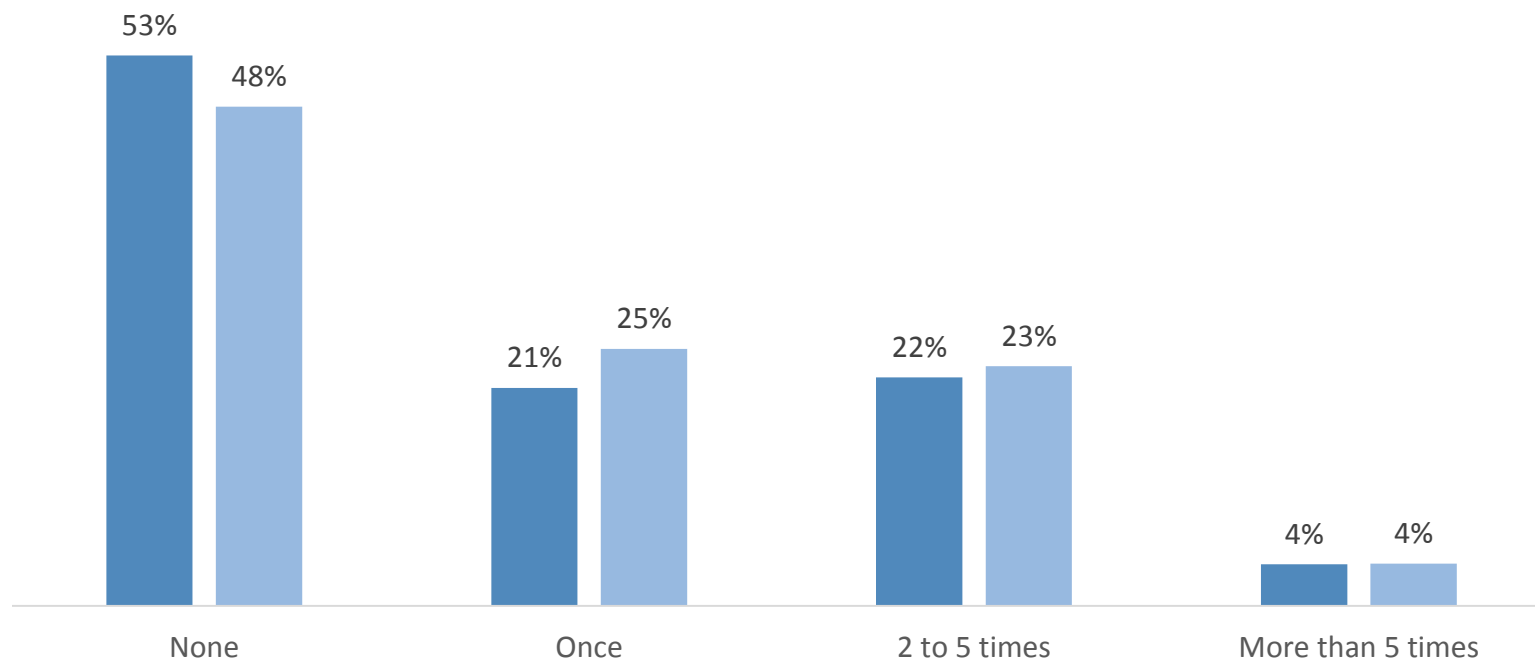


Expenditure, quality of service and switching (7)

Respondents experiencing disconnections, faults or other problems in the last 12 months

Number of respondents – 784

■ 2017 ■ 2019

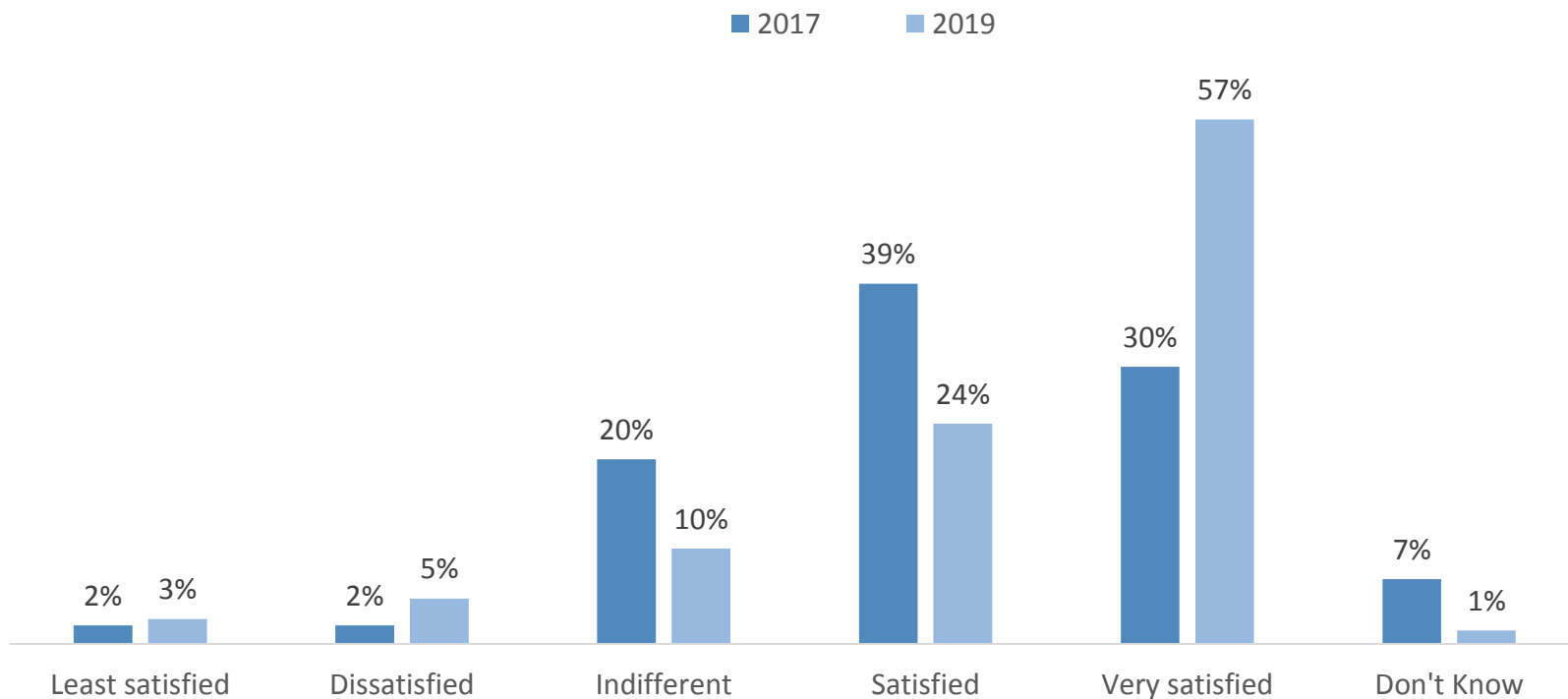


48% of respondents with a fixed broadband connection did not experience any disconnections, faults or other problems. The corresponding figure reported in 2017 stood at 53%.

Expenditure, quality of service and switching (8)

Satisfaction levels with the response of the service provider to reported faults

Number of respondents with a fixed broadband connection and having reported a fault in the last 12 months – 407
i.e. 52% of the number of respondents having a fixed broadband connection

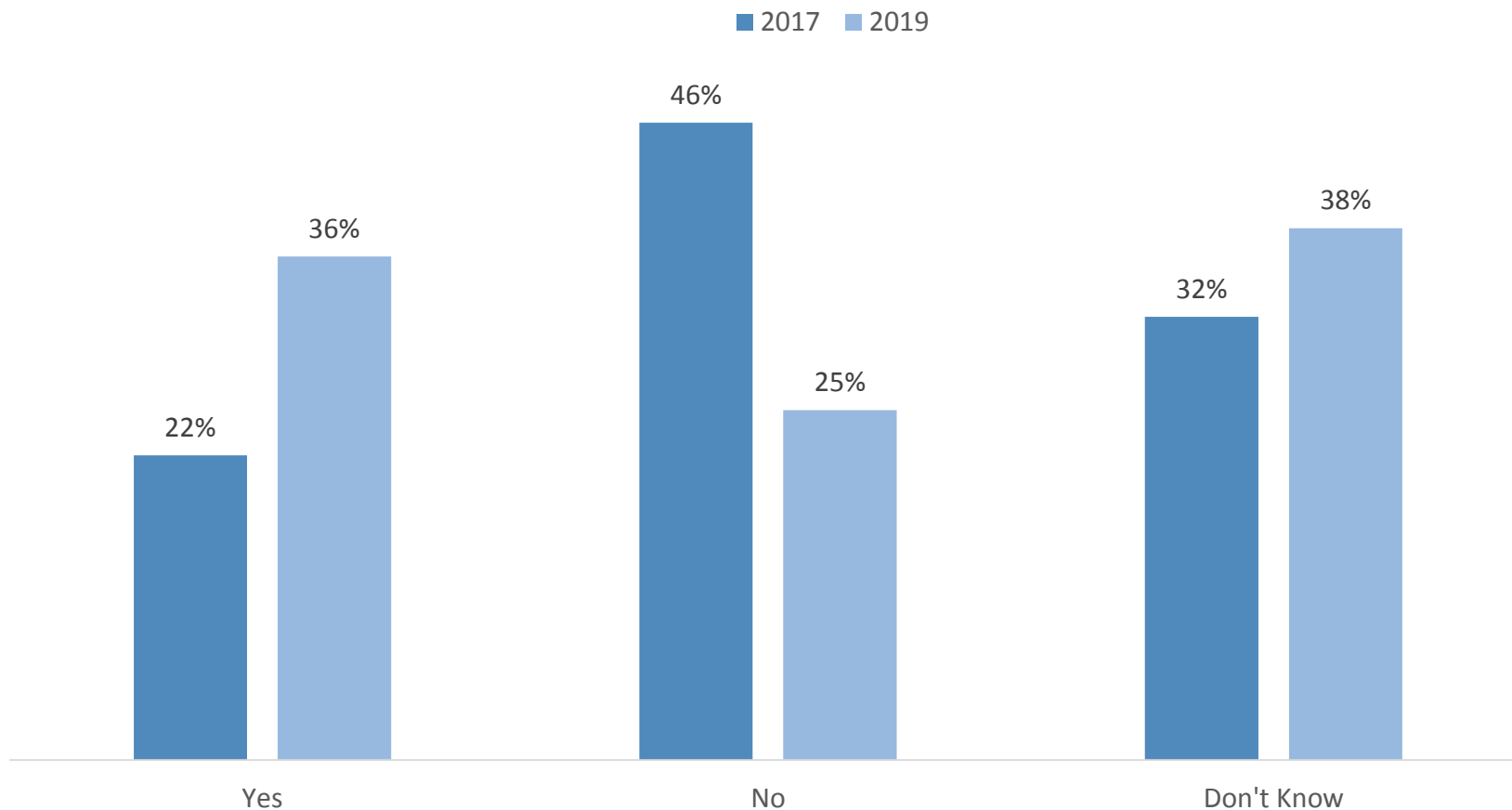


A high level of satisfaction was reported with respect to the way service providers addressed reported faults.

Expenditure, quality of service and switching (9)

Propensity to switch in the event of a 10% increase in the monthly access fee for this service

Number of respondents with a fixed broadband connection - 784



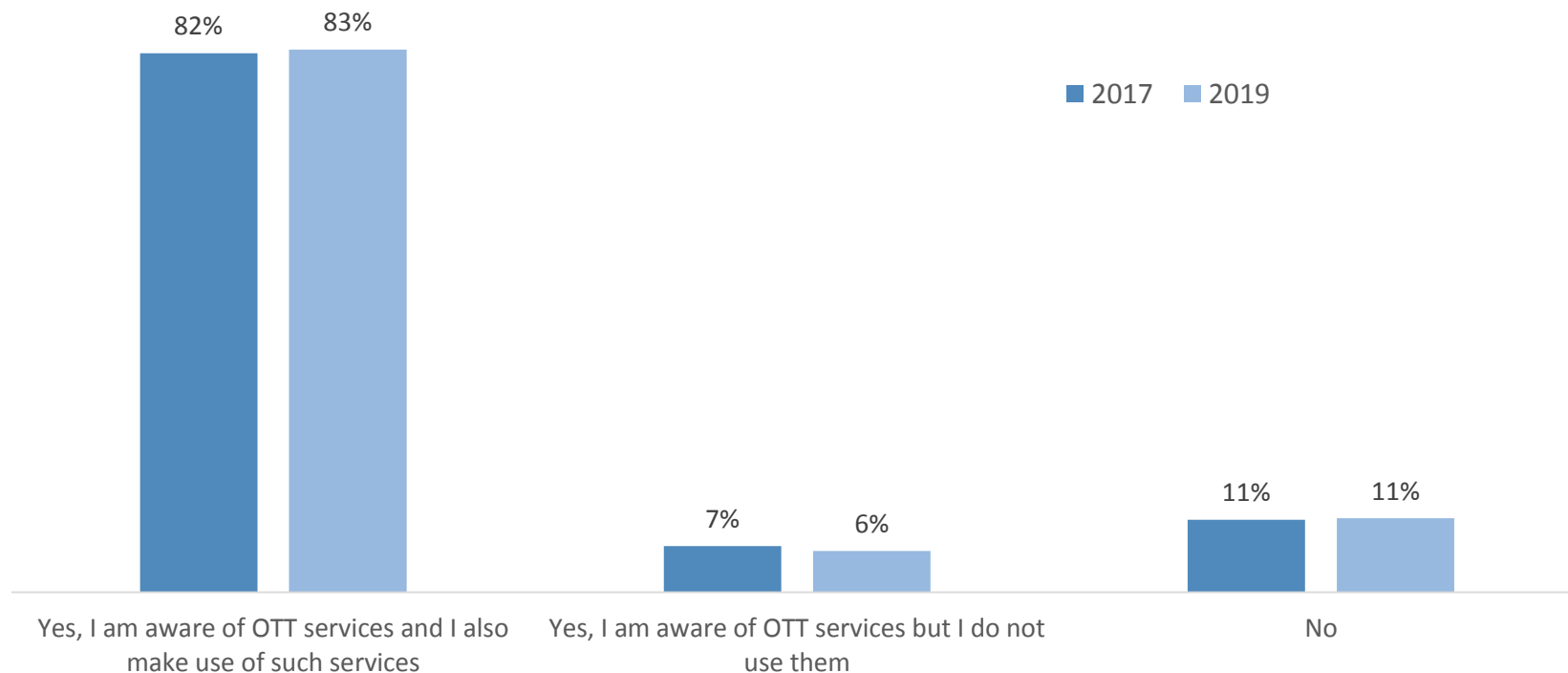


Over-the-top (OTT) services over fixed broadband

OTT usage over fixed broadband (1)

Usage of OTT services over fixed broadband

Number of respondents with a fixed broadband connection - 784



The majority of respondents (83%) indicated using OTT services over fixed broadband. Among those that they do not utilise OTT services over fixed broadband, most say they find no use for such services whilst the rest consider them as being too complicated to use.

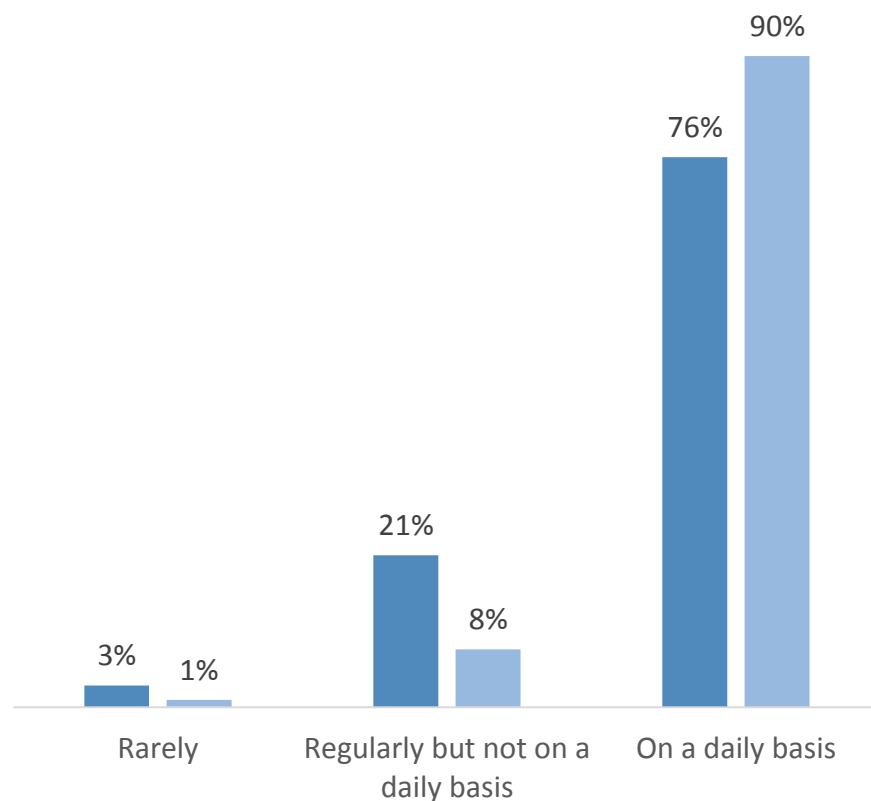
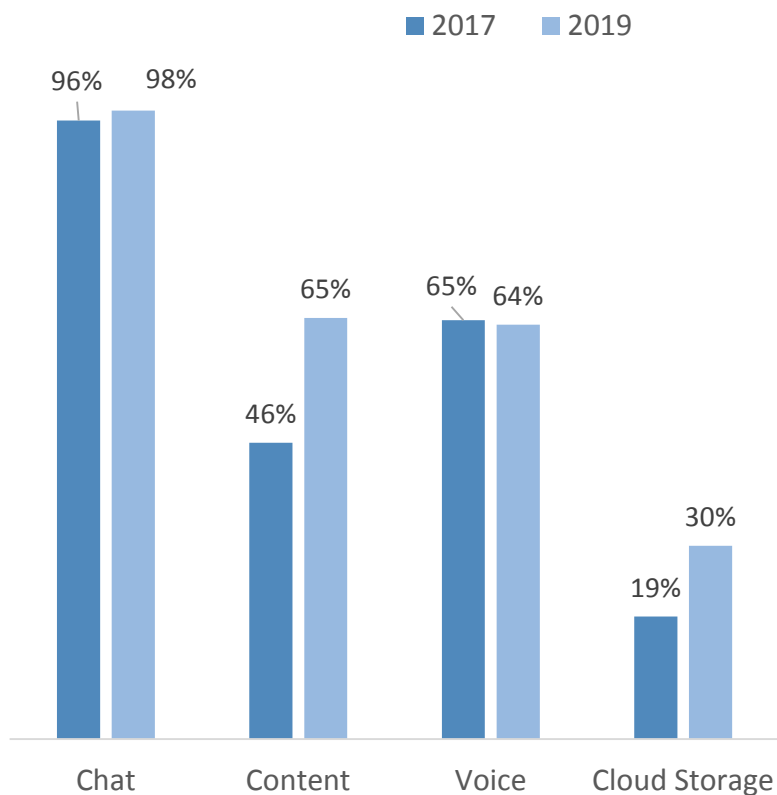
OTT usage over fixed broadband (2)

Types of OTT services used

Frequency of usage of OTTs over fixed broadband

Number of respondents with making use of OTTs over a fixed broadband connection – 647

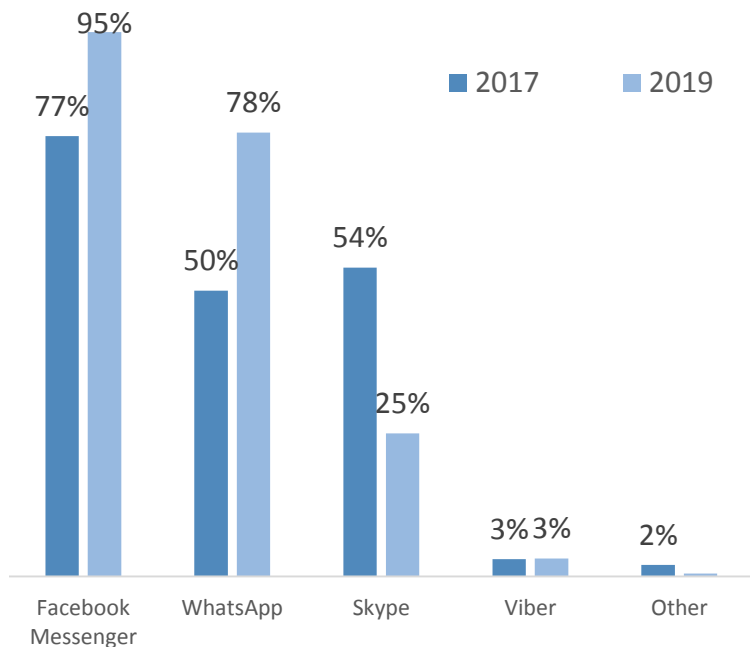
i.e. 82% of the number of respondents having a fixed broadband connection at home (respondents can give multiple answers)



OTT usage over fixed broadband (3)

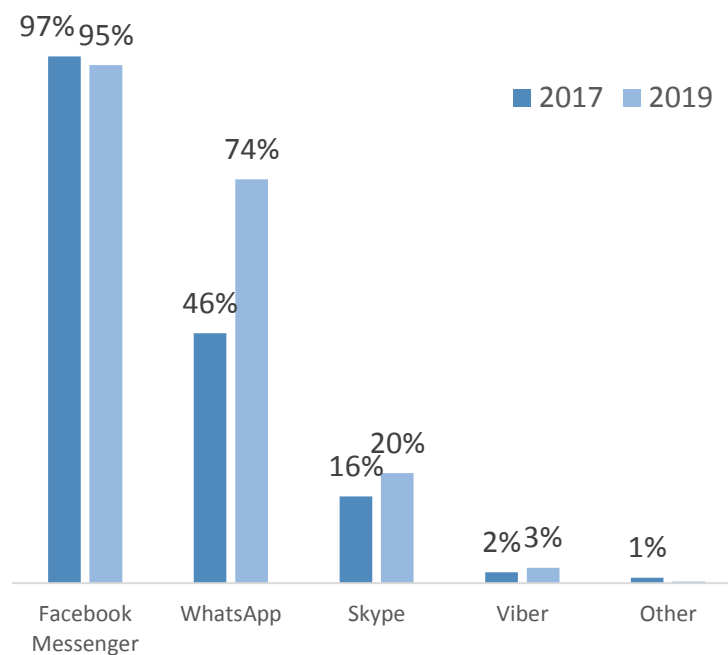
Platforms used to access voice OTTs over fixed broadband

Number of respondents with making use of voice OTTs over a fixed broadband connection – 416
i.e. 64% of the number of respondents making use of OTTs (respondents can give multiple answers)



Platforms used to access chat OTTs over fixed broadband

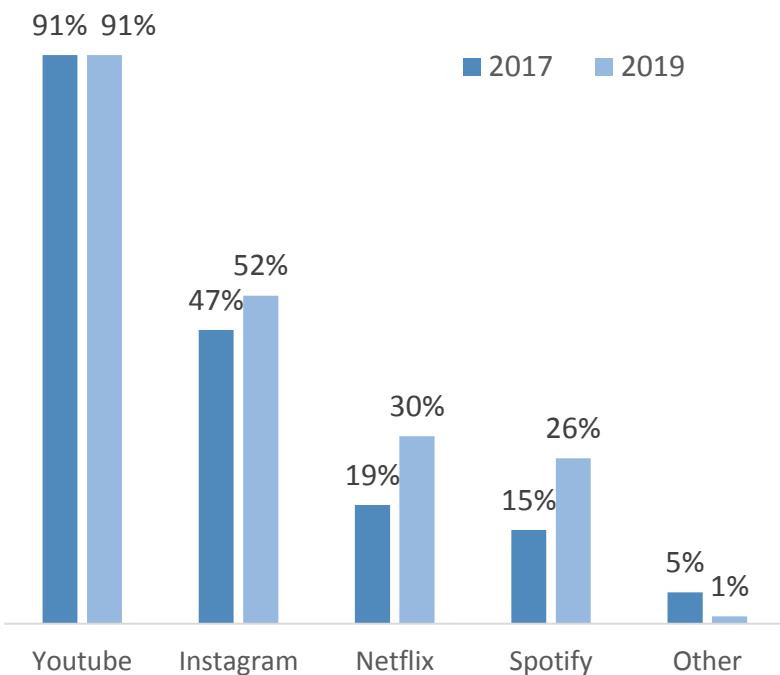
Number of respondents with making use of chat OTTs over a fixed broadband connection – 630
i.e. 97% of the number of respondents having a fixed broadband connection at home (respondents can give multiple answers)



OTT usage over fixed broadband (4)

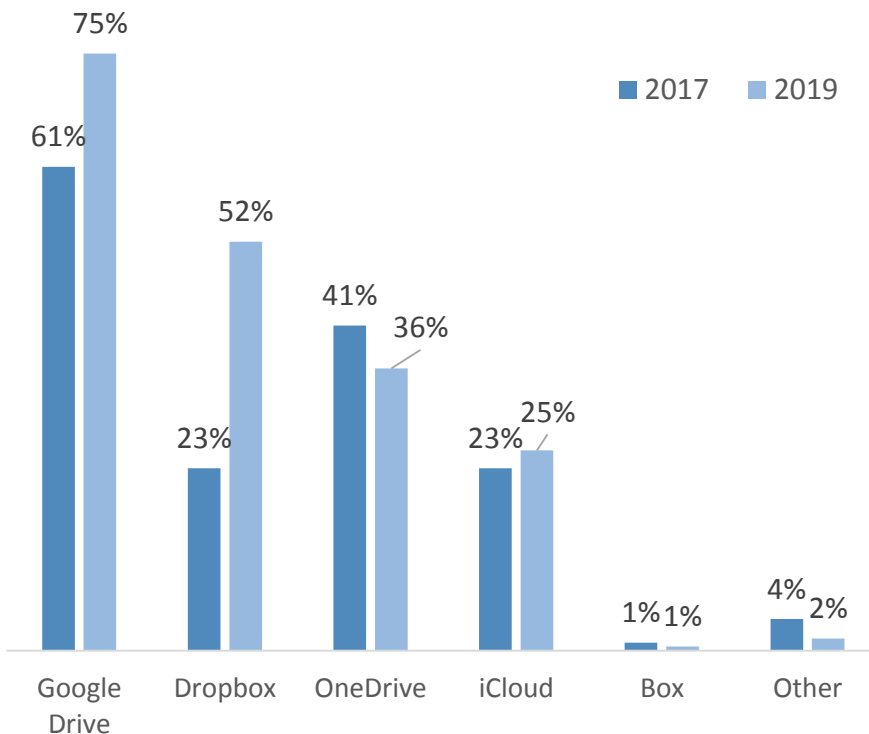
Platforms used to access content OTTs over fixed broadband

Number of respondents with making use of content OTTs over a fixed broadband connection – 423
i.e. 65% of the number of respondents making use of OTTs (respondents can give multiple answers)



Platforms used to access cloud storage OTTs

Number of respondents with making use of cloud storage OTTs over a fixed broadband connection – 194
i.e. 30% of the number of respondents making use of OTTs (respondents can give multiple answers)

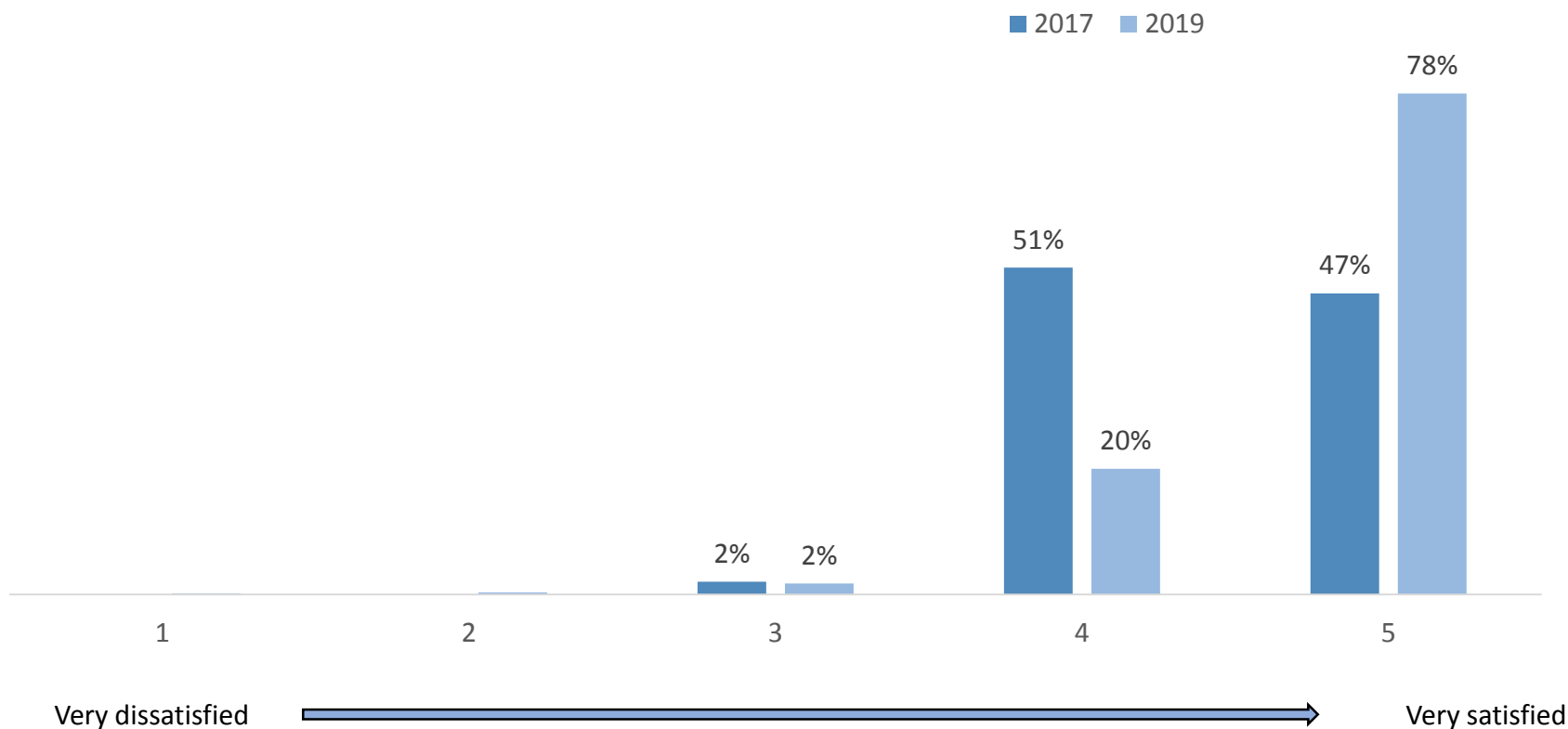


OTT usage over fixed broadband (5)

Satisfaction levels with the use of OTTs

Number of respondents making use of OTTs over fixed broadband – 647

i.e. 83% of the number of respondents having a fixed broadband connection





End