PURPOSE & METHODOLOGY

To obtain qualitative information on the **use of mobile data services** by the Maltese population and compare results across surveys to **identify trends** in the use of internet on mobile phones.

**Sample**
- 500 mobile phone users.
- An additional 291 interviews conducted to boost the mobile data users cohort.

**Fieldwork**
- 10-min CATI
- Feb-March 2014
- Margin of error of 4.38% at 95% confidence interval.
MOBILE INTERNET USAGE
Do you own a smartphone?

% of total respondents (n=500)

- 37% of respondents in 2013
- 42% of respondents in 2014

Age groups and smartphone ownership:

- 16 - 24 yrs: 66% (2013), 79% (2014)
- 25 - 34 yrs: 58% (2013), 77% (2014)
- 35 - 44 yrs: 40% (2013), 45% (2014)
- 45 - 54 yrs: 27% (2013), 35% (2014)
- 55 - 64 yrs: 16% (2013), 11% (2014)
- 65 - 74 yrs: 8% (2013), 9% (2014)
Do you know that the internet can be accessed on a mobile phone?

% of total respondents (n=500)
Mobile Data Users (those that accessed the internet in last 6mths or more)
% of those aware of internet use on mobile (n=395)

Total | 16 - 24yrs | 25 - 34yrs | 35 - 44yrs | 45 - 54yrs | 55 - 64yrs | 65 - 74yrs
--- | --- | --- | --- | --- | --- | ---
2014 | 53% | 48% | 93% | 82% | 84% | 68% | 51% | 32% | 31% | 14% | 16% | 12% | 9%
2013 | 48% | 51% | 68% | 82% | 84% | 84% | 68% | 51% | 31% | 32% | 14% | 12% | 9%
Did you access/use the Internet from your mobile phone in the...?

% of those aware of internet use on mobile (n=395)

Mostly claimed by the younger cohorts.

Mostly claimed by the older age-groups.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last 7 days</td>
<td>48%</td>
<td>42%</td>
</tr>
<tr>
<td>Last month</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Last 3 months</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Last 6 months</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>More than 6 months ago</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Never</td>
<td>53%</td>
<td></td>
</tr>
</tbody>
</table>

Mostly claimed by the younger cohorts.

Mostly claimed by the older age-groups.
MOBILE DATA USAGE

including boost interviews
Did you access/use the Internet from your mobile phone and how often?

% of mobile data users (n=500)

- **Last 7 days**
  - 2014: 91%
  - 2013: 88%

- **Last month**
  - 2014: 8%
  - 2013: 10%

85% use it everyday

80% use it everyday

- At least once a day
  - 2014: 82%
  - 2013: 72%

- At least once a week
  - 2014: 15%
  - 2013: 23%

- At least once a month
  - 2014: 3%
  - 2013: 3%

- Less than once monthly
  - 2014: 1%
  - 2013: 3%
Which data plan do you usually subscribe to?

% of mobile data plan subscribers (n=406)

- **Contract**
  - 2014: 52% (mostly preferred by 35-44 yrs & 45-54 yrs.)
  - 2013: 44%

- **Prepaid**
  - 2014: 36% (mostly favoured by 16-24 yrs & 25-34 yrs.)
  - 2013: 43%
When did you first subscribe to a mobile data plan?

% of mobile data plan subscribers (n=406)

<table>
<thead>
<tr>
<th>Time Period</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 6 months ago</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>6 - 12 months</td>
<td>31%</td>
<td>15%</td>
</tr>
<tr>
<td>12 - 24 months</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>24 months+</td>
<td>25%</td>
<td>45%</td>
</tr>
<tr>
<td>Don't remember</td>
<td>4%</td>
<td>12%</td>
</tr>
</tbody>
</table>
On average, how much time do you spend using the internet from your mobile per session?

% of mobile data users (n=498)

- Less than 15 min: 36%
- At least 15 min: 26%
- At least 30 min: 16%
- At least an hour: 17%
- More than 1 hr: 11%

89% use it at least once a day.
Which 3 main activities, in order of preference, do you carry out on your mobile phone? (1st Mention)

% of mobile data users (n=500)

- Socialising: 46% (2014), 38% (2013)
- Communication: 32% (2014), 36% (2013)
- Accessing content via apps: 5% (2014), 3% (2013)
- Information: 5% (2014), 7% (2013)
- News: 5% (2014), 9% (2013)
Which 3 main activities, in order of preference, do you carry out on your mobile phone? (2\textsuperscript{nd} Mention)

% of mobile data users that chose a 2\textsuperscript{nd} option (n= 432)

- **Communication**: 31% (2014) 22% (2013)
- **Socialising**: 26% (2014) 24% (2013)
- **News**: 15% (2014) 11% (2013)
- **Information**: 13% (2014) 9% (2013)
- **Accessing content via apps**: 7% (2014) 3% (2013)
Which 3 main activities, in order of preference, do you carry out on your mobile phone? (3rd Mention)

% of mobile data users that chose a 3rd option (n=318)

- Socialising: 14% (2013), 17% (2014)
- Information: 13% (2013), 15% (2014)
- Communication: 11% (2013), 14% (2014)
- Accessing content via apps: 4% (2013), 9% (2014)
- Streaming online music/radio: 7% (2013), 6% (2014)
Mostly Accessed APPs
% of mobile data users that use APPs

1st mention (n = 83)
- Social media: 39% (2013), 41% (2014)
- Messaging: 29% (2013), 40% (2014)
- Content: 7% (2013), 10% (2014)
- Games: 6% (2013), 12% (2014)
- Payments: 2% (2013), 2% (2014)

2nd mention (n = 74)
- Social media: 21% (2013), 32% (2014)
- Games: 5% (2014), 14% (2013)
- Content: 4% (2013), 9% (2014)
- Music: 1% (2013), 11% (2014)
- Shopping: 1% (2013), 0% (2014)

3rd mention (n = 54)
- Content: 10% (2013), 24% (2014)
- Music: 20% (2013), 30% (2014)
- Messaging: 15% (2013), 19% (2014)
- Social media: 15% (2013), 19% (2014)
- Shopping: 4% (2013), 5% (2014)
- Games: 2% (2013), 5% (2014)
Mostly Accessed Websites
% of mobile data users (n=479)

Top 5 websites accessed on mobile (in order of preference)

1. Facebook
2. Google (gmail, maps, search, etc)
3. Youtube
4. Times of Malta
5. eBay
Do you access/use the internet on your mobile phone when abroad?

% of mobile data users (n=497)

- **Always via a mobile data plan**
  - 2014: 7%
  - 2013: 6%
  - Mostly preferred by 45-54 yrs

- **Always via WIFI**
  - 2014: 26%
  - 2013: 16%

- **Sometimes via a mobile data plan**
  - 2014: 13%
  - 2013: 3%
  - Mostly cited by 65-74 yrs

- **Sometimes via WIFI**
  - 2014: 31%
  - 2013: 12%

- **Never**
  - 2014: 23%
  - 2013: 63%
For each of the following statements, can you tell me whether you agree or disagree?

% of mobile data plan subscribers (n=406)

- **Mobile data coverage is good**
  - Agree: 72%
  - Neither Agree nor Disagree: 17%
  - Disagree: 11%

- **The mobile data service is reliable**
  - Agree: 72%
  - Neither Agree nor Disagree: 18%
  - Disagree: 9%

- **I would consider paying more for better speeds**
  - Agree: 20%
  - Neither Agree nor Disagree: 18%
  - Disagree: 62%

- **I’m satisfied with my current mobile data speeds**
  - Agree: 67%
  - Neither Agree nor Disagree: 16%
  - Disagree: 16%

- **It is difficult to keep track of mobile data service costs**
  - Agree: 40%
  - Neither Agree nor Disagree: 20%
  - Disagree: 40%

- **Mobile data service costs are affordable**
  - Agree: 61%
  - Neither Agree nor Disagree: 20%
  - Disagree: 18%
What are the main reasons for not accessing/using the internet from your mobile?

% of non-mobile data users (n=186)

- My mobile does not allow internet access
- Do not need to/ not interested
- Don’t know how to use it
- Cost - too expensive
- Prefers to use other devices
- Other

90% of non-mobile data users do not have a smartphone
Thank You