MCA Market Research – Telecom bundle services

Based on a consumer perceptions survey

MCA reference: MCA/S/26-5859

February 2026

Purpose and methodology

Research purpose

- **Mapping household consumer decision-making** regarding bundle service preferences and choices in Malta.

- This research informs us on:

  - **Factors influencing bundle preferences** and **consumer motivations for choosing bundled services**;
  - **Expenditure patterns**;
  - **Service quality** and **reliability satisfaction levels**;
  - **Service disruptions** and **operator response effectiveness**; and
  - **End-user switching behaviour** and bundle segment competitiveness.

Methodology

PKF Malta carried out fieldwork on behalf of MCA between August and October 2025		
Fieldwork	Sample Design	Statistical Parameters
• 400 respondents - randomly selected • Data collection: → Online - 246 (61.5%) → Telephone - 154 (38.5%) • One person per household interviewed, aged 18+	• Stratification of target responses: → age composition aligned with Maltese population → Malta's six geographical regions → socio-economic categories of the Maltese population → operators' market share of bundles, based on MCA data	• 400 net respondents • Margin of error: +/- 4.9% at 95% confidence interval • Any refusals / incomplete surveys were removed and replaced with new responses.

Key insights

Key insights

- **Fixed internet is a main driver of bundle choices -** 82% of households citing it as such, up from 55% in 2023.
- **TV influence on bundle decisions just at 6% -** an indicative shift from entertainment-led to connectivity-led demand.
- **Overall satisfaction with bundles remains high** – 72% of households very or fairly satisfied with quality of service and 69% satisfied with mix of products in the bundle.
- **Switching rates remain low -** only 7% of households switched providers in the past two years (6% in 2023).
- **Strong loyalty** is driven by inconvenience of switching and the perception that providers offer broadly similar quality.
- Over half (52%) of households experienced a **fault or disconnection** in the past 12 months.
- **Awareness of early termination fees has improved -** 24% of respondents aware of these fees in 2025 (15% in 2023).

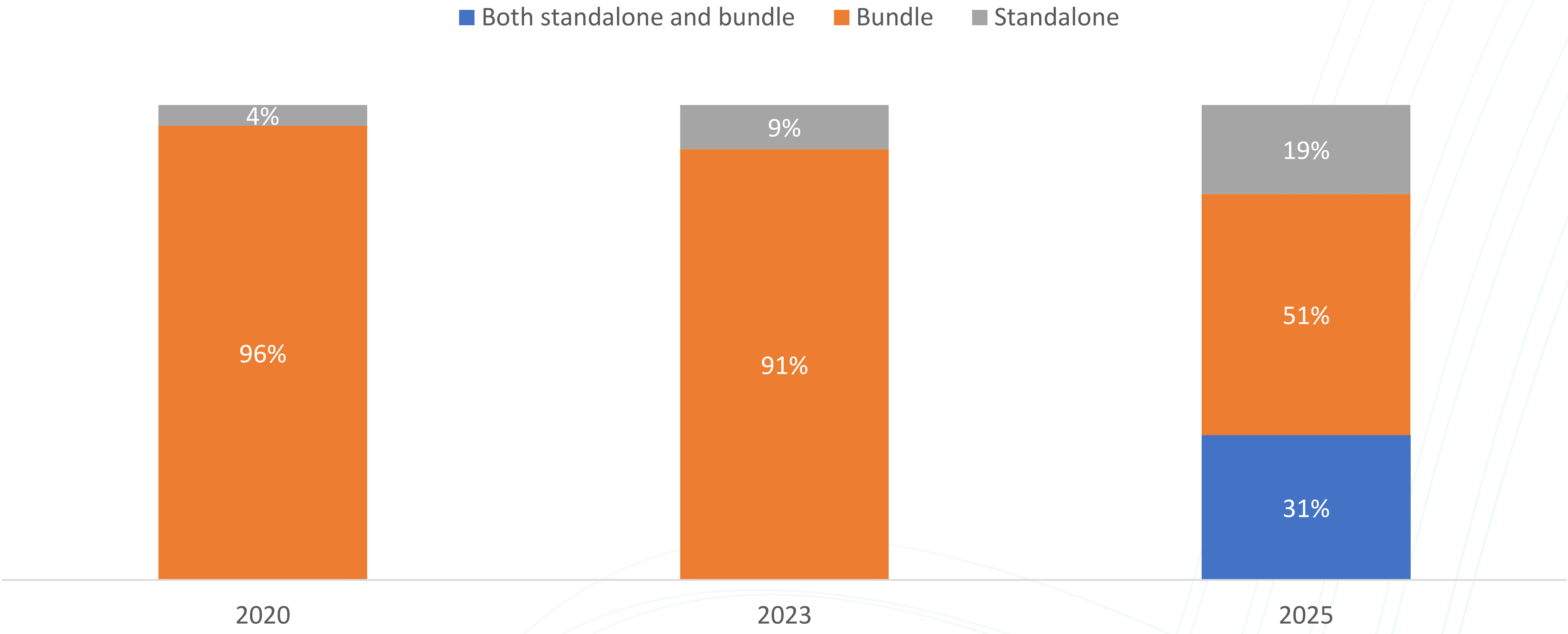
Bundles vs Standalone:
Usage and Intentions

Subscription type – standalone vs bundles

Type of telecommunications service arrangement

Number of respondents – 400

Of which 82% form part of a bundle, be it by itself or alongside other standalone services



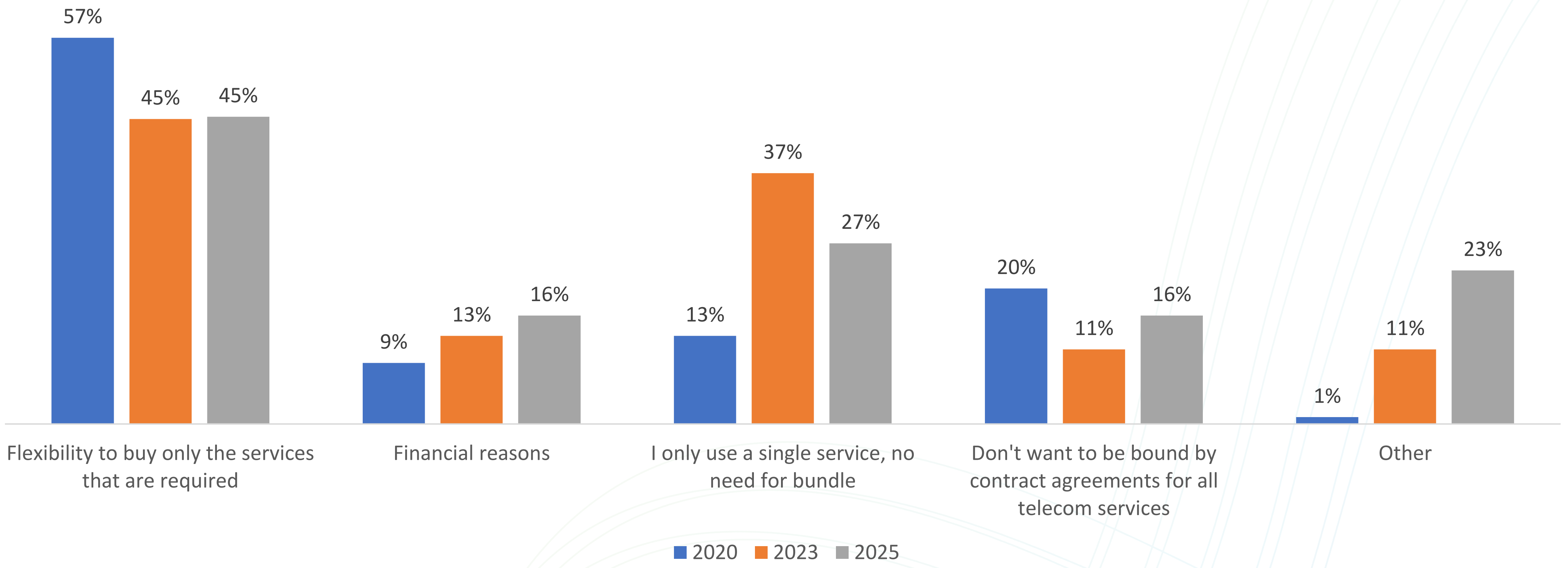
In the 2025 survey, respondents were, for the first time, able to select both standalone and bundled telecom services, reflecting multiple subscriptions.

Factors driving take-up of standalone plans

Reasons why respondents chose standalone services instead of a bundle

Number of households that do not have a bundled subscription – 75

In 2023 and 2025, respondents were allowed to select multiple options

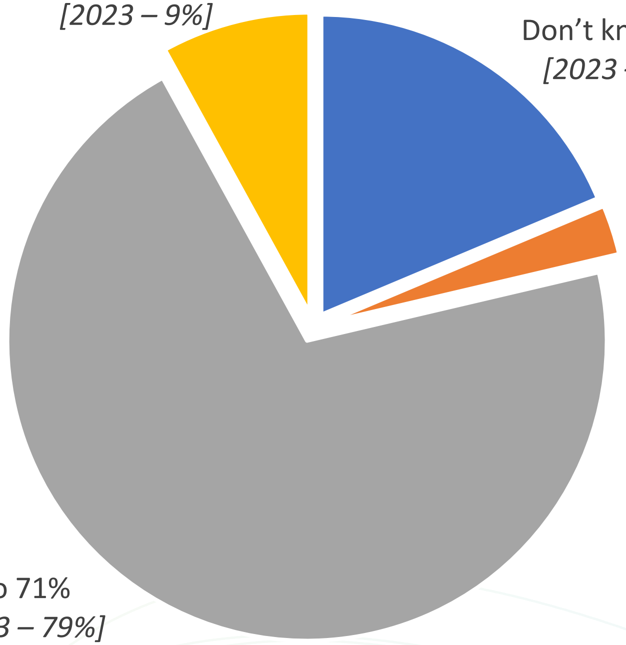


Likelihood of bundle subscription adoption

Respondent intension of purchasing a bundled subscription over the next 6 months

Number of households that do not have a bundled subscription – 75

Of which 8% are considering to switch to a bundle over the next six months



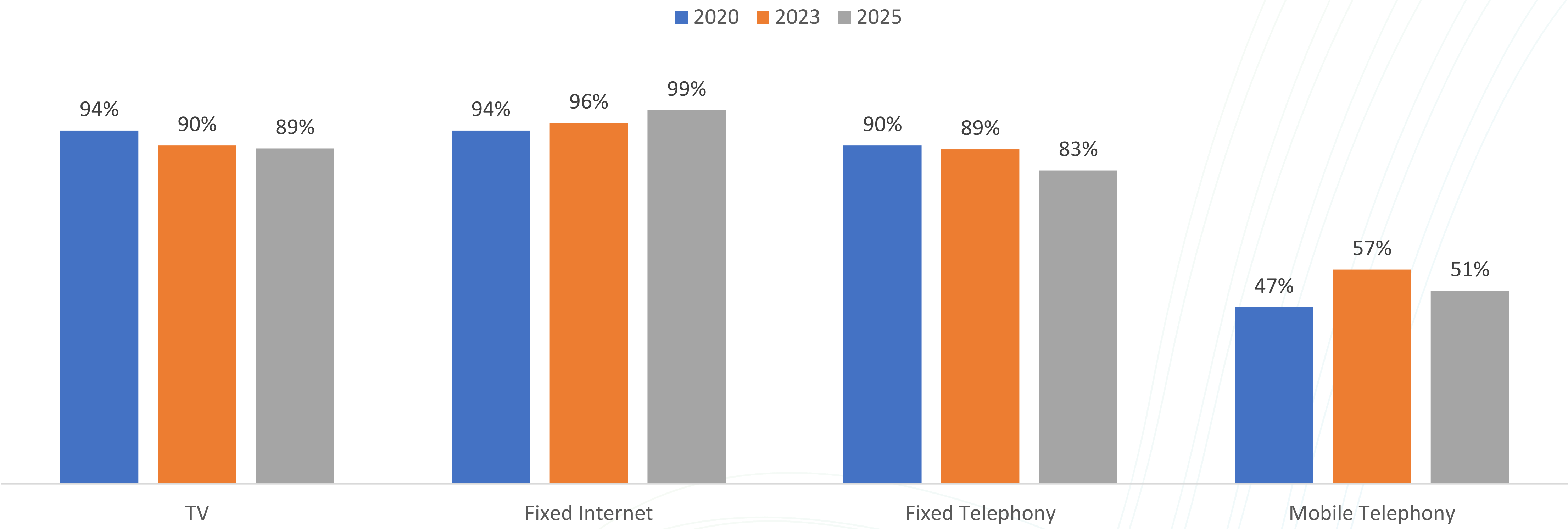
2025 is the first year where respondents where asked whether they are mainly or partially responsible for the decision making within their household.

Bundle adoption and influential factors

Composition of the bundle subscription

Service penetration in bundled subscriptions

Number of households that have a bundled subscription – 325



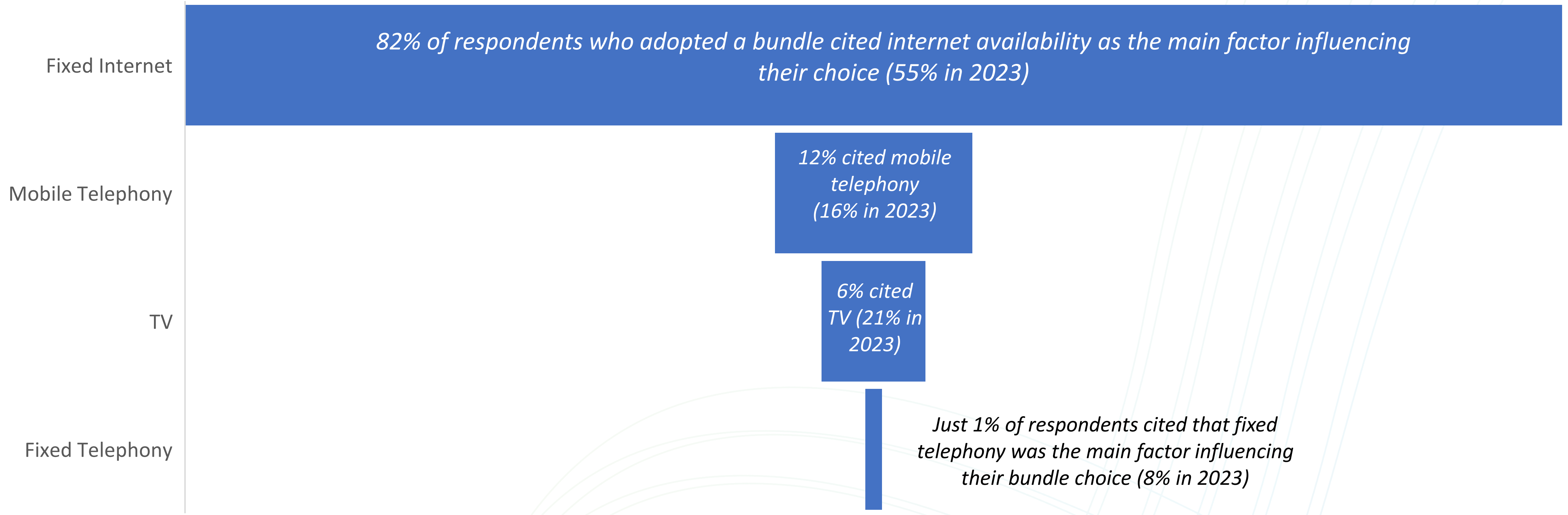
Results align with MCA data. Mobile telephony figures should be interpreted with caution, as some services may be purchased as add-ons. MCA defines a bundle as services offered together at a single fixed monthly price, not when a service carries an additional monthly cost in a separate contract.

Top services influencing bundle adoption

Services consumers consider when purchasing a bundle subscription

Number of households that have a bundled subscription – 325

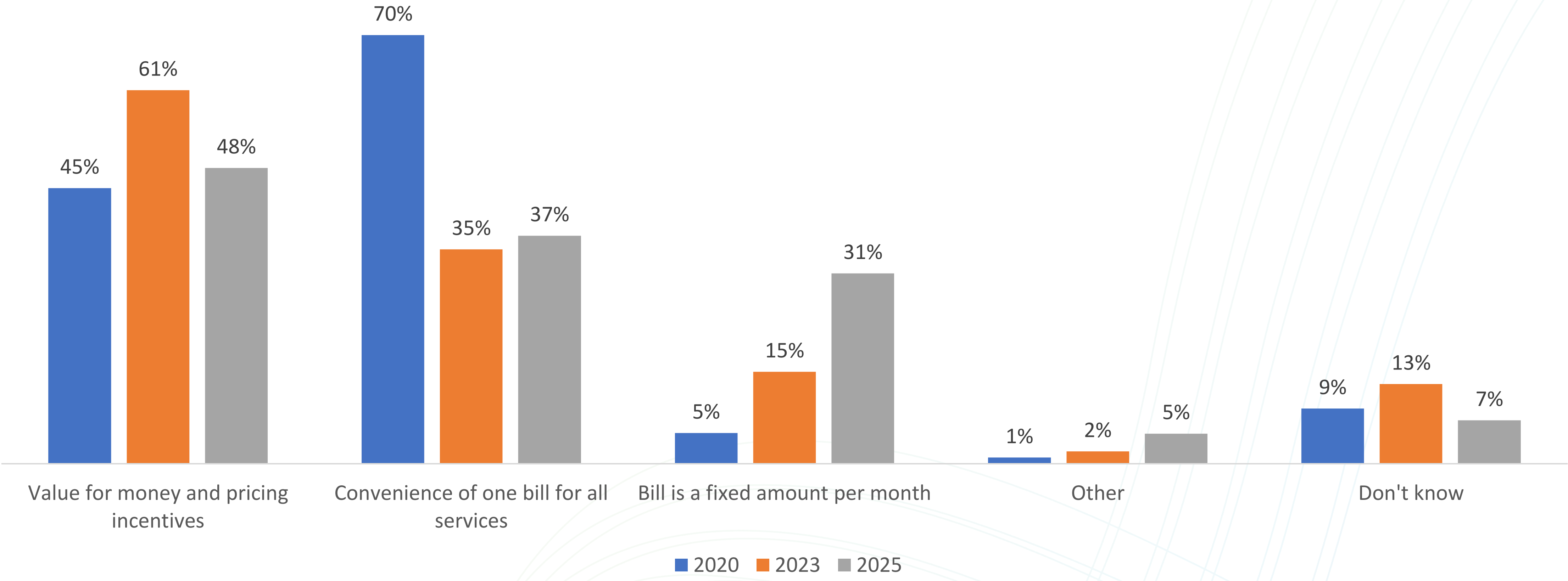
Don't know responses from 2023 have been removed for comparability purposes



Factors driving bundle adoption

Reasons why respondents chose to bundle their telecom services

Number of households that have a bundled subscription – 325

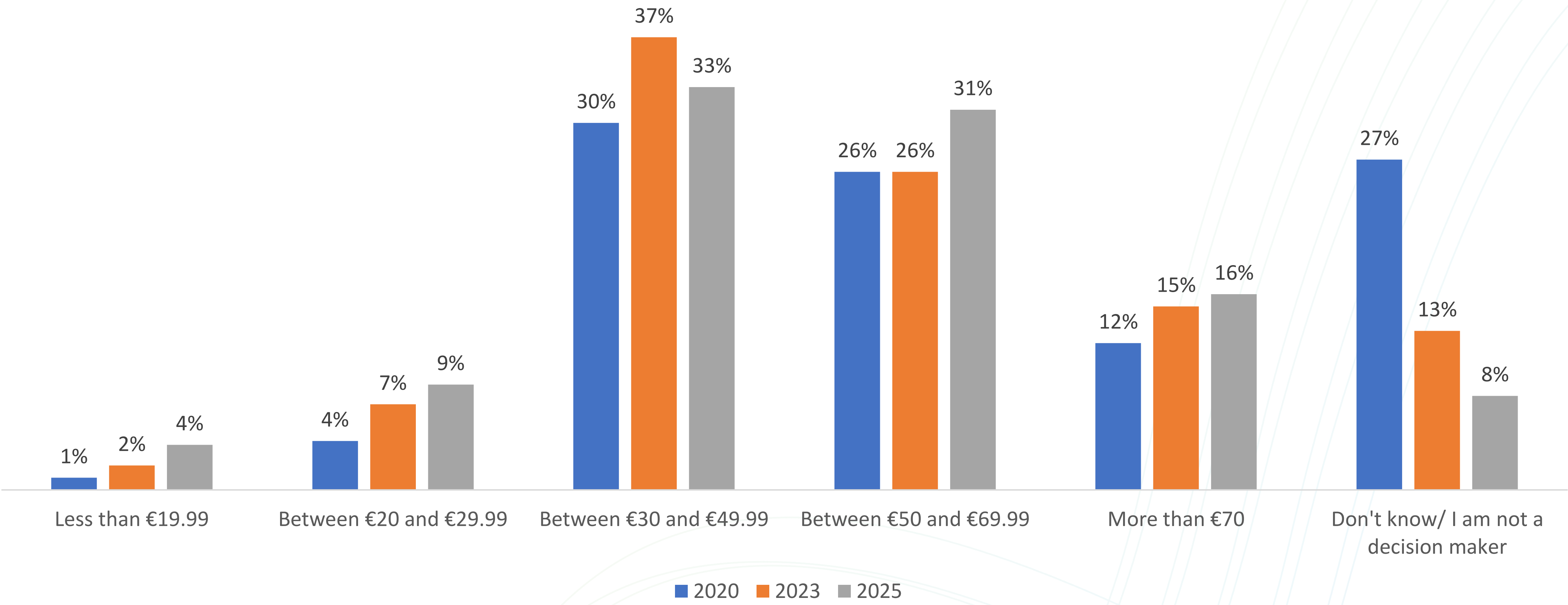


Expenditure and Satisfaction

(of main bundle subscription)

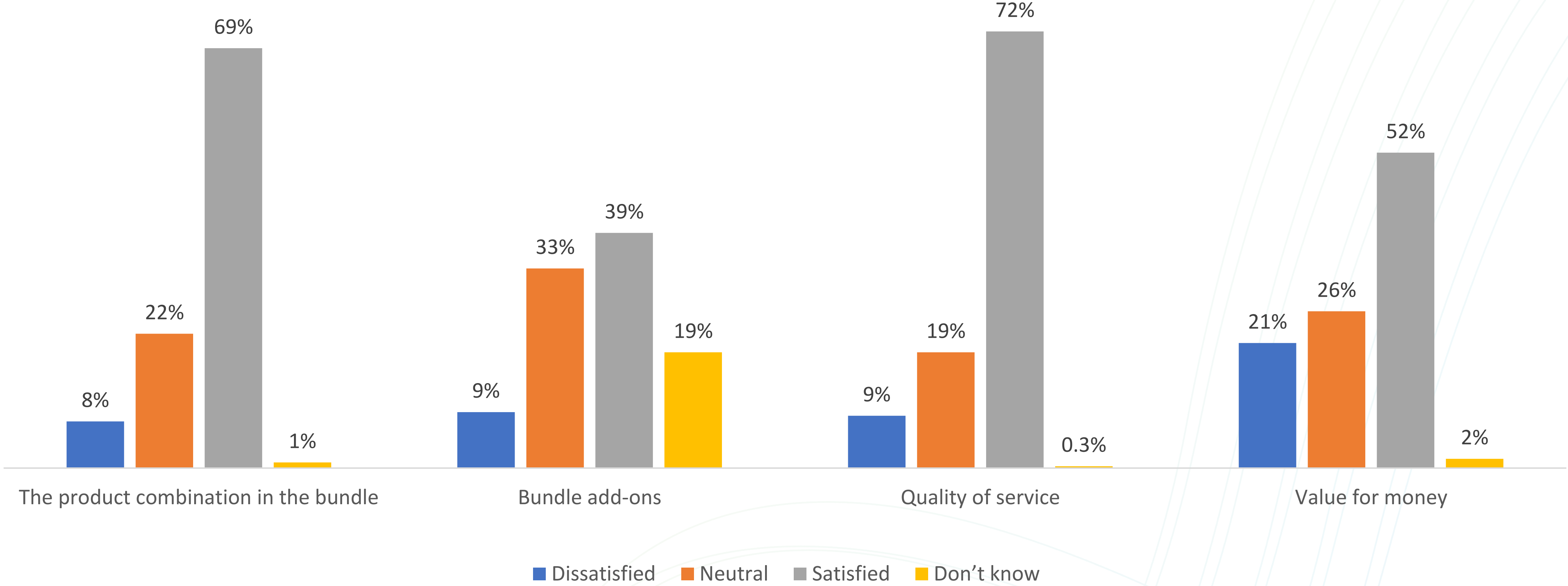
Average monthly expenditure

Total number of households with a bundled subscription – 325



Satisfaction with key individual bundle attributes

Total number of households with a bundled subscription – 325



In the 2025 survey, respondents were asked for the first time to rank their satisfaction with specific bundle attributes, rather than provide an overall assessment of the service quality

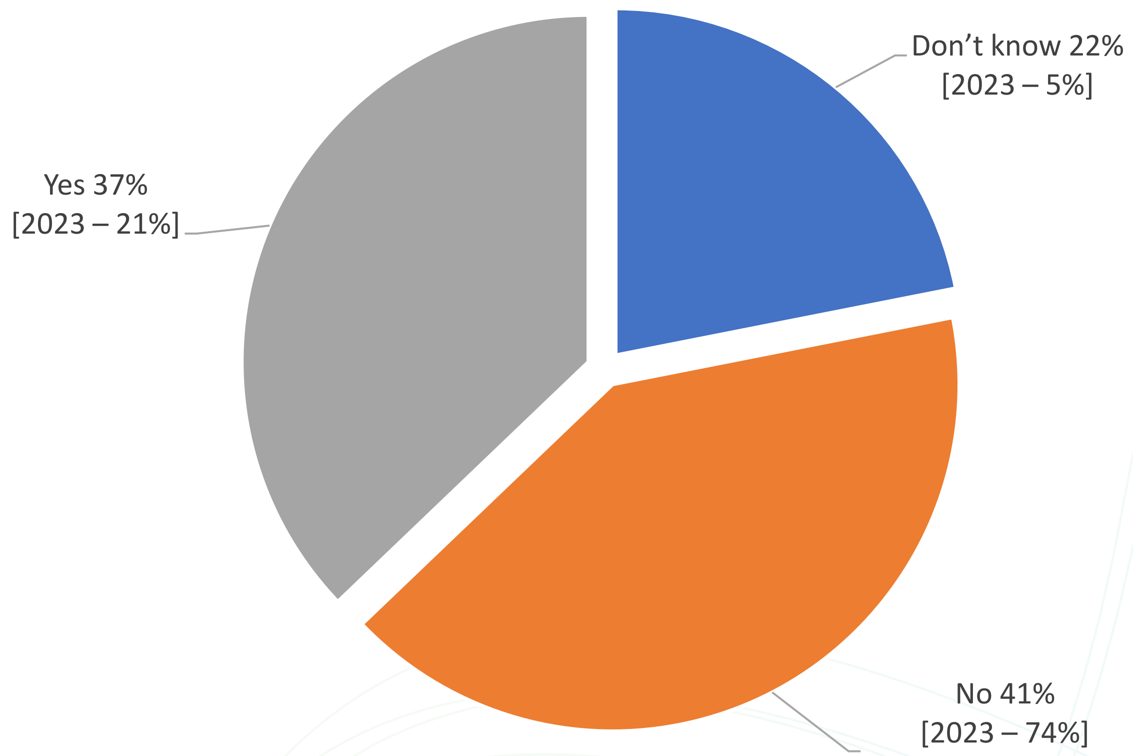
Switching and Fault Resolution

(of main bundle subscription)

Switching considerations among dissatisfied users

Number of households that are not completely satisfied with their bundle service – 105

This refers to respondents who reported dissatisfaction with at least one bundle attribute. This differs from previous years, when respondents reporting a neutral stance were also classified as dissatisfied consumers.

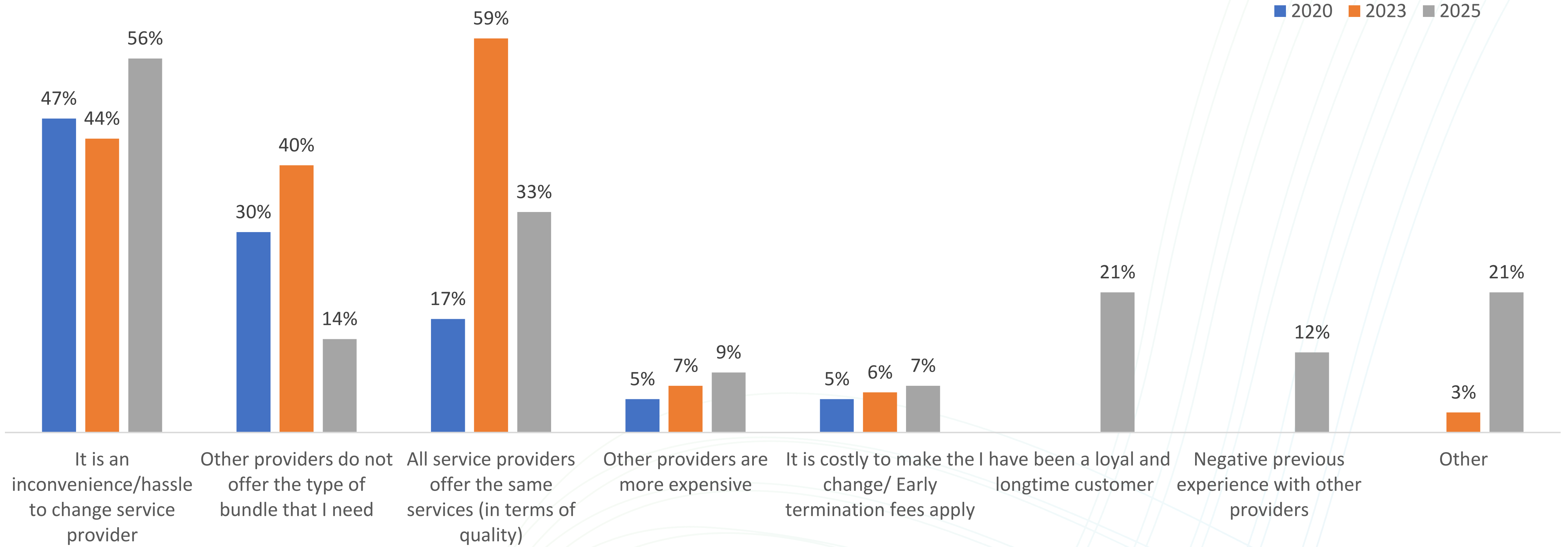


Main bundle retention among dissatisfied users

Reasons why respondents who are not completely satisfied with their bundle choose to retain it

Number of partially/ fully dissatisfied respondents who would not switch – 43

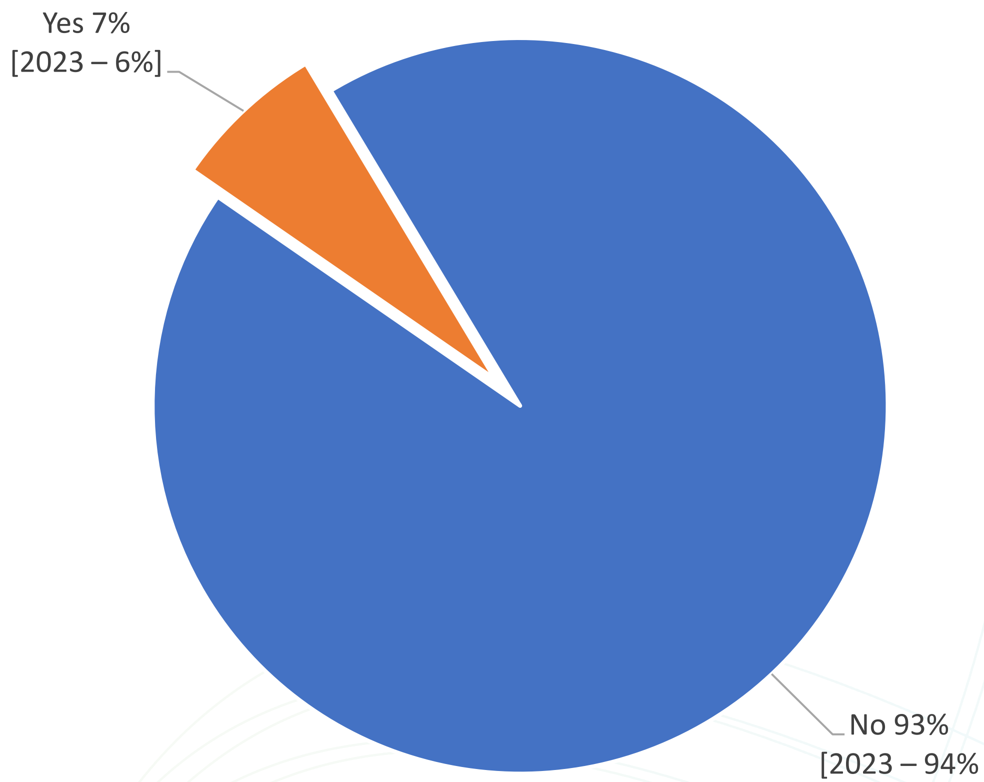
Respondents could select multiple reasons. Reason categories have changed over time; loyalty and negative experiences related reasons were not included in earlier years, while wiring issues are now grouped under switching inconveniences.



Switching over the past two years

Share of respondents who switched from one operator's bundle to another in the past two years

Total number of households with a bundled subscription – 325

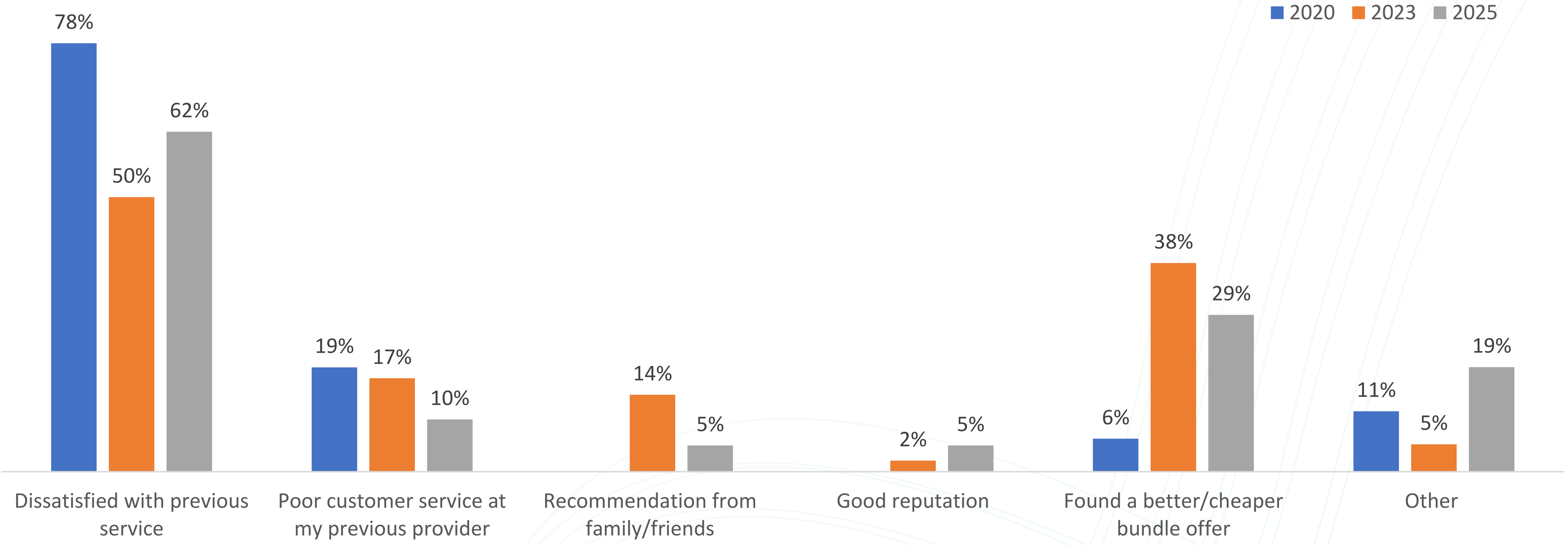


Motivations for switching operator

Main reasons why respondents switched operators

Number of households that have switched a bundle service during the past two years – 22

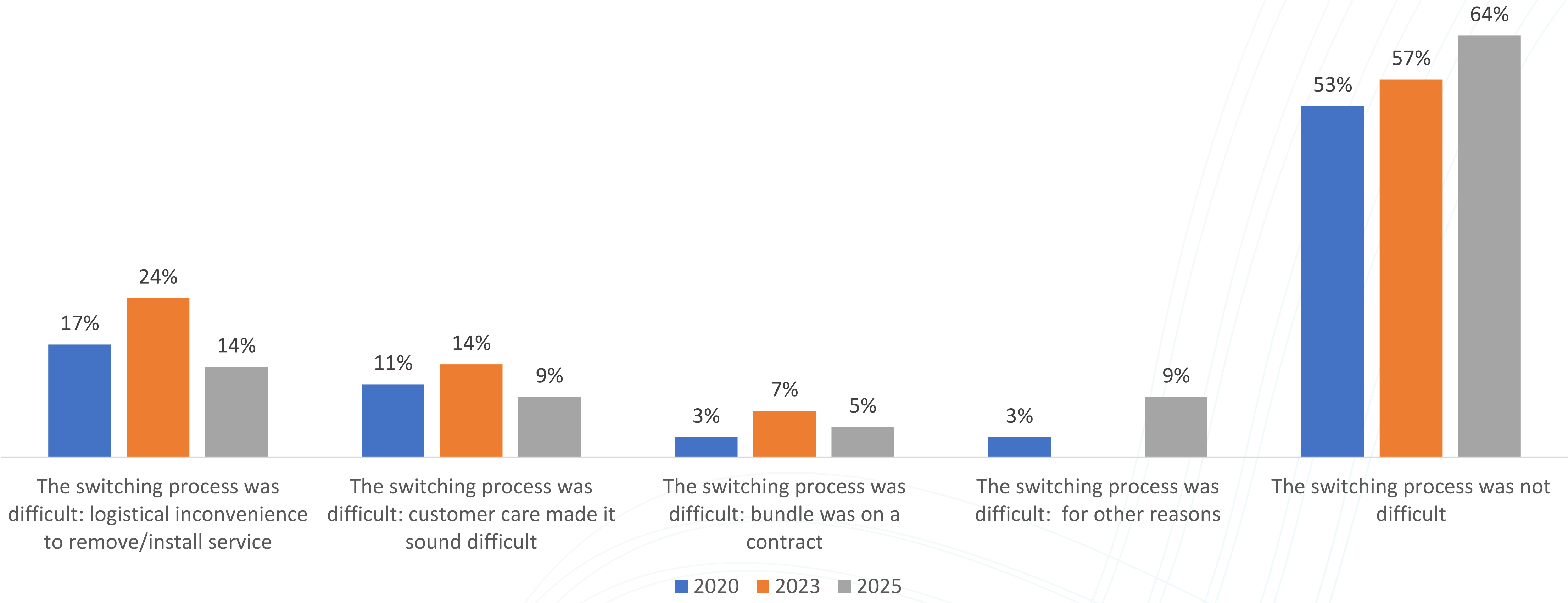
In 2025, there was one Don't know response – this has been excluded from the analysis
Figures should be interpreted with caution due to the small sample size



Views expressed on the switching process

Ease of switching and associated challenges

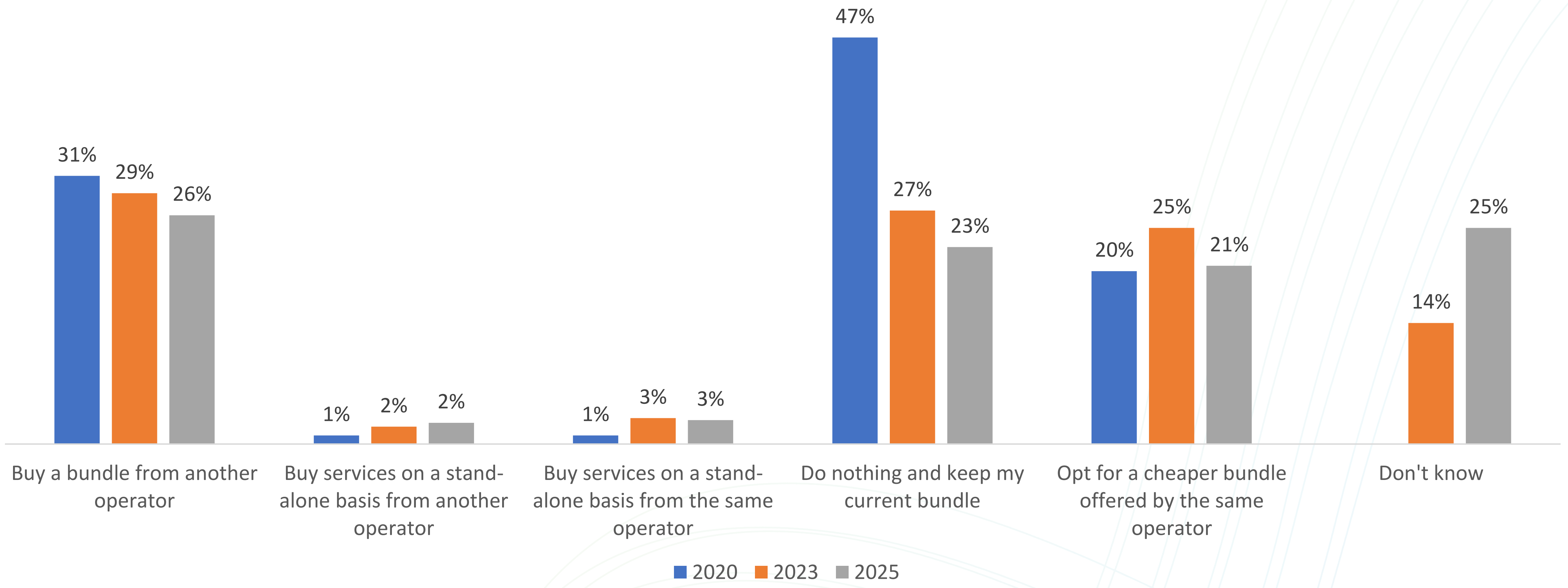
Number of households that have switched a bundle service during the past two years – 22



Expected response to a 10% price increase

Potential households' switching behaviour in the event of a 10% increase in price

Number of households that have a bundled subscription – 325

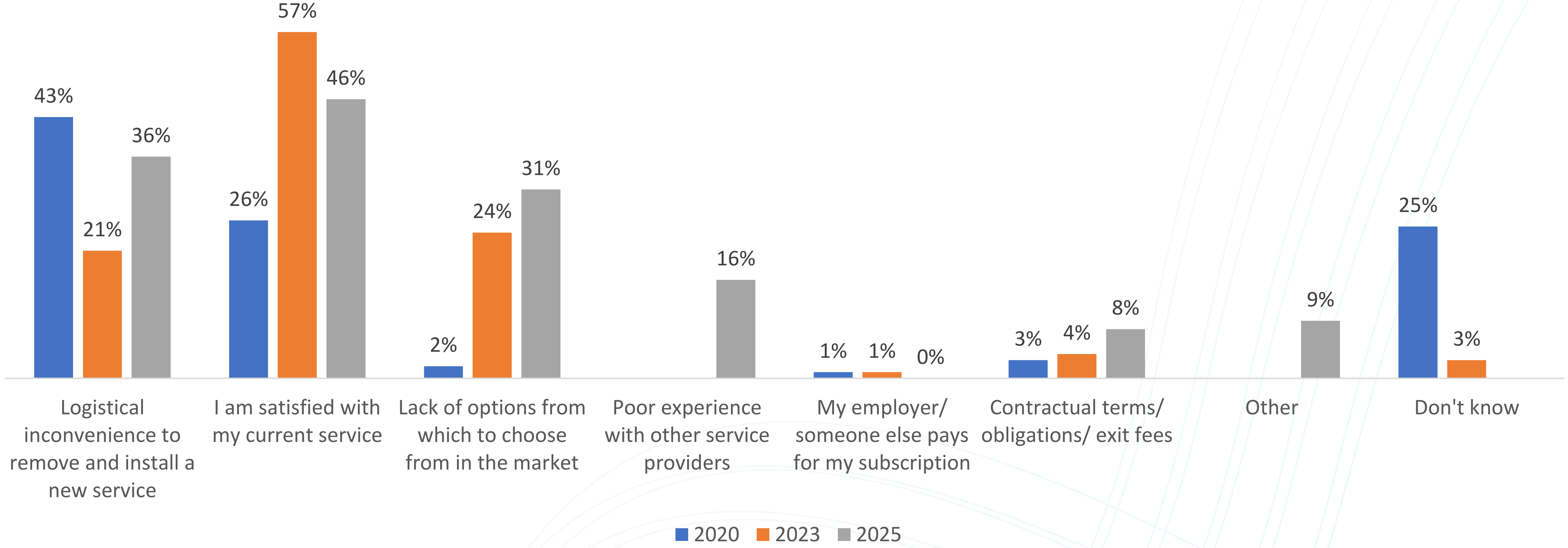


Reasons for bundle retainment despite price increase

Reasons why households choose to keep their current bundle in the event of a 10% price increase

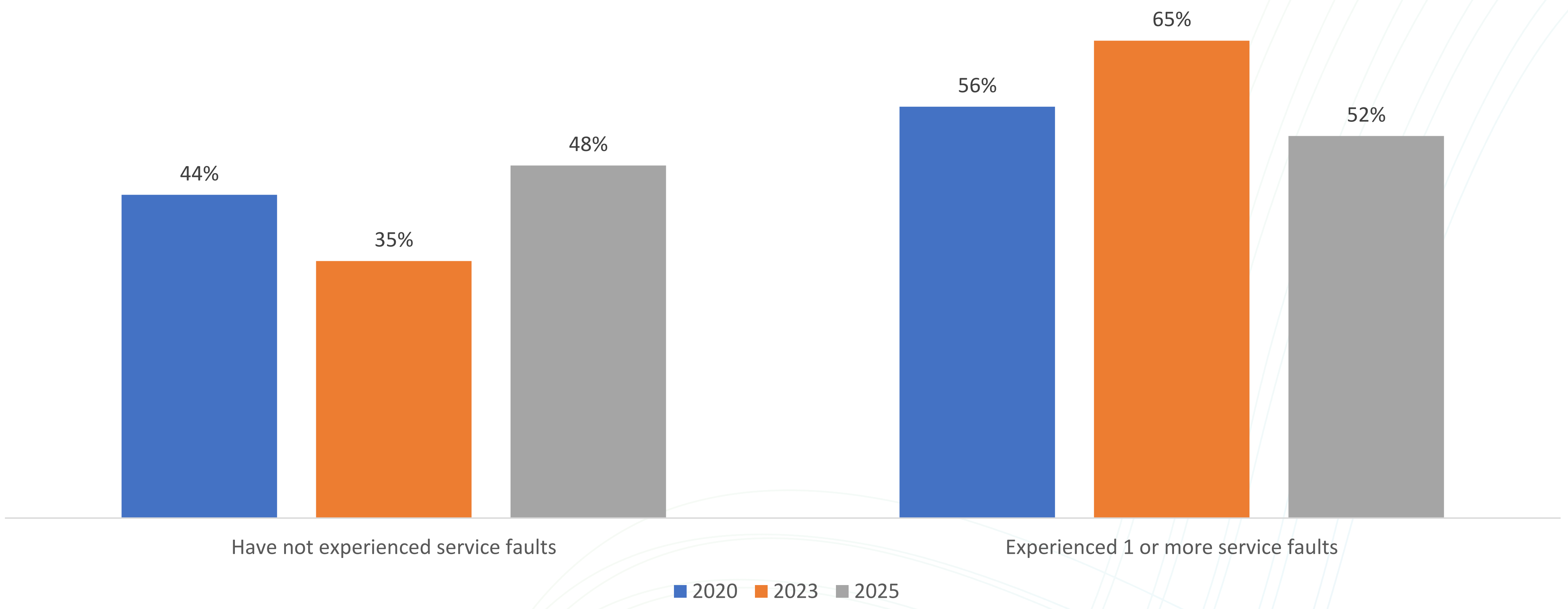
Number of households likely to keep their bundle after a 10% price increase – 74

This refers to response who chose to do nothing and keep the existing bundle in the event of a 10% increase in the monthly access fee of the bundle



Service faults in the past 12 months

Total number of households with a bundled subscription – 325

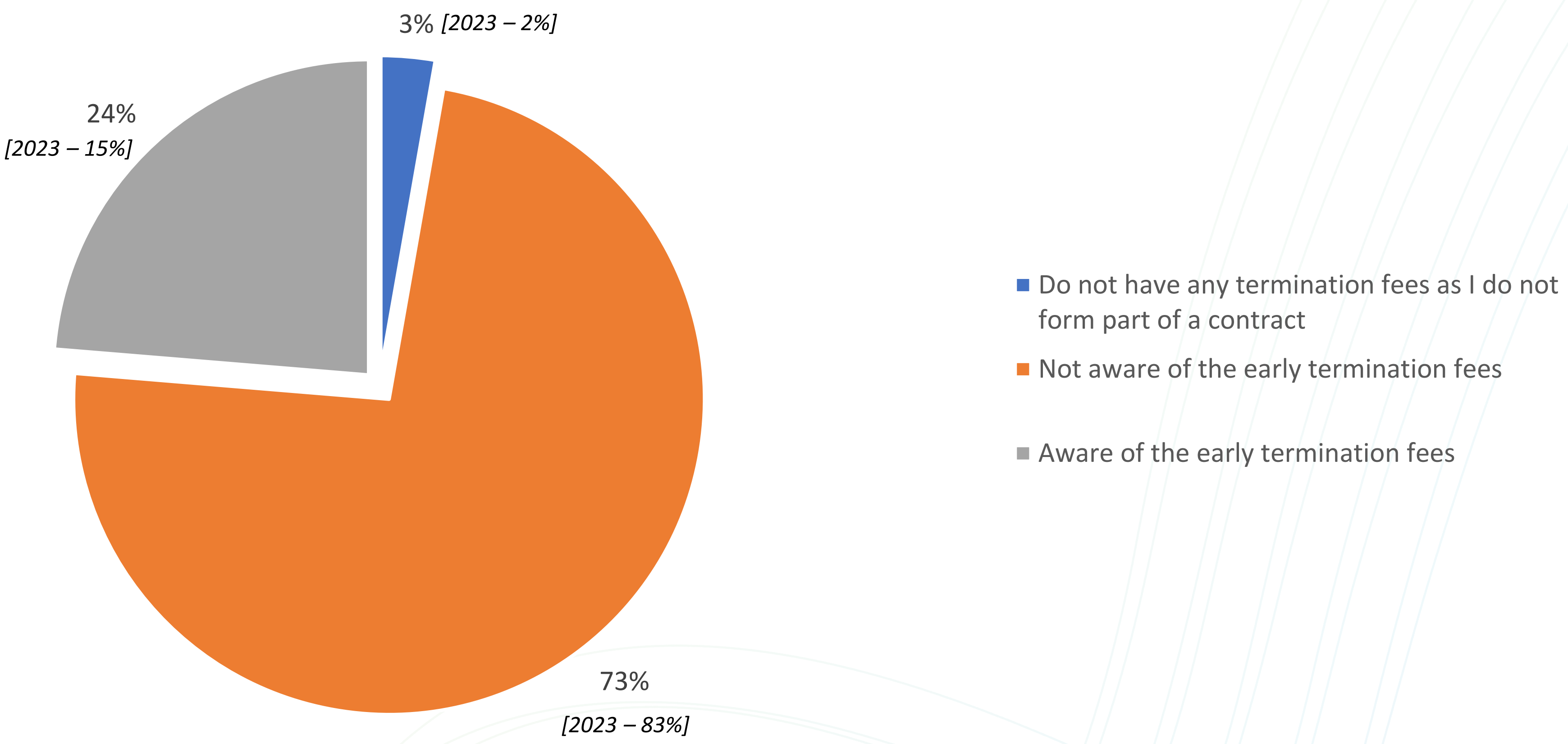


Contract Terms and Termination Fees

(of main bundle subscription)

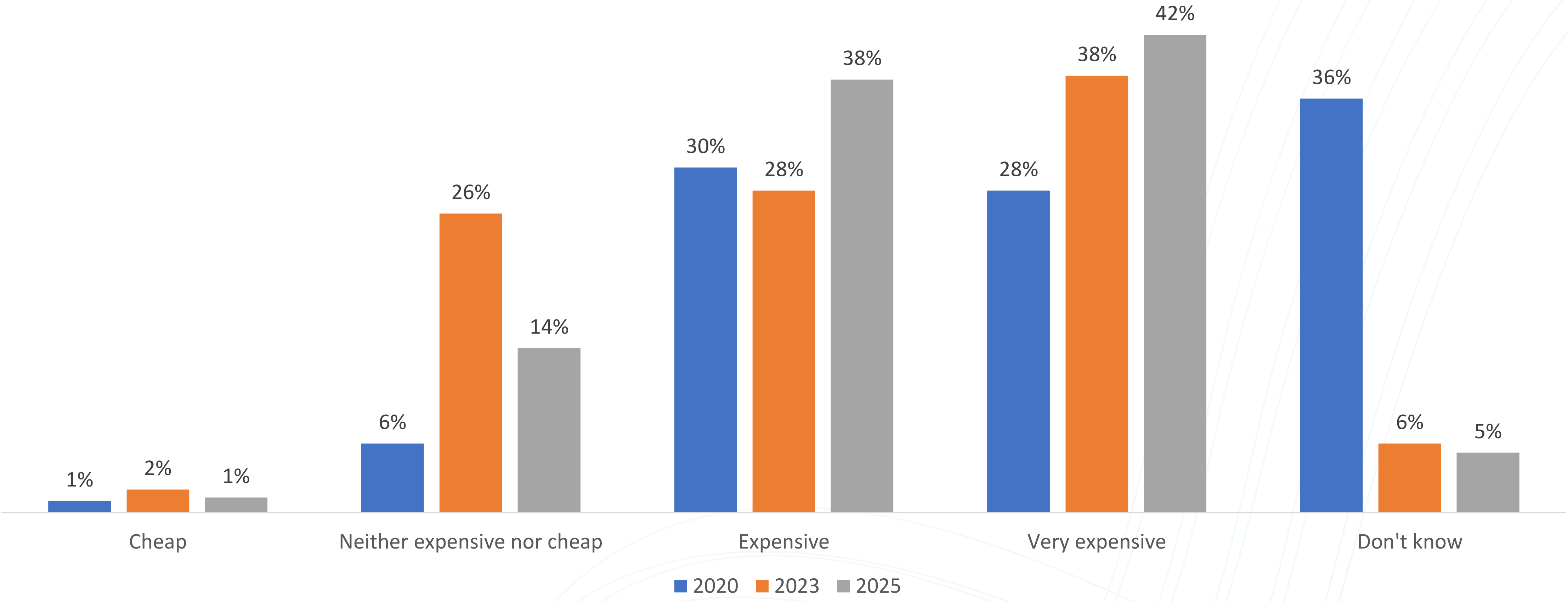
Awareness on early termination fees

Number of households that have a bundled subscription – 325



Perceived affordability of early termination fees

Number of households that know the cost of the early termination fees attached to their bundle contract – 77



Awareness of exit notice

Respondent awareness that operator must provide 30 days' written notice to exit a contract without termination fees in the event that contract terms change

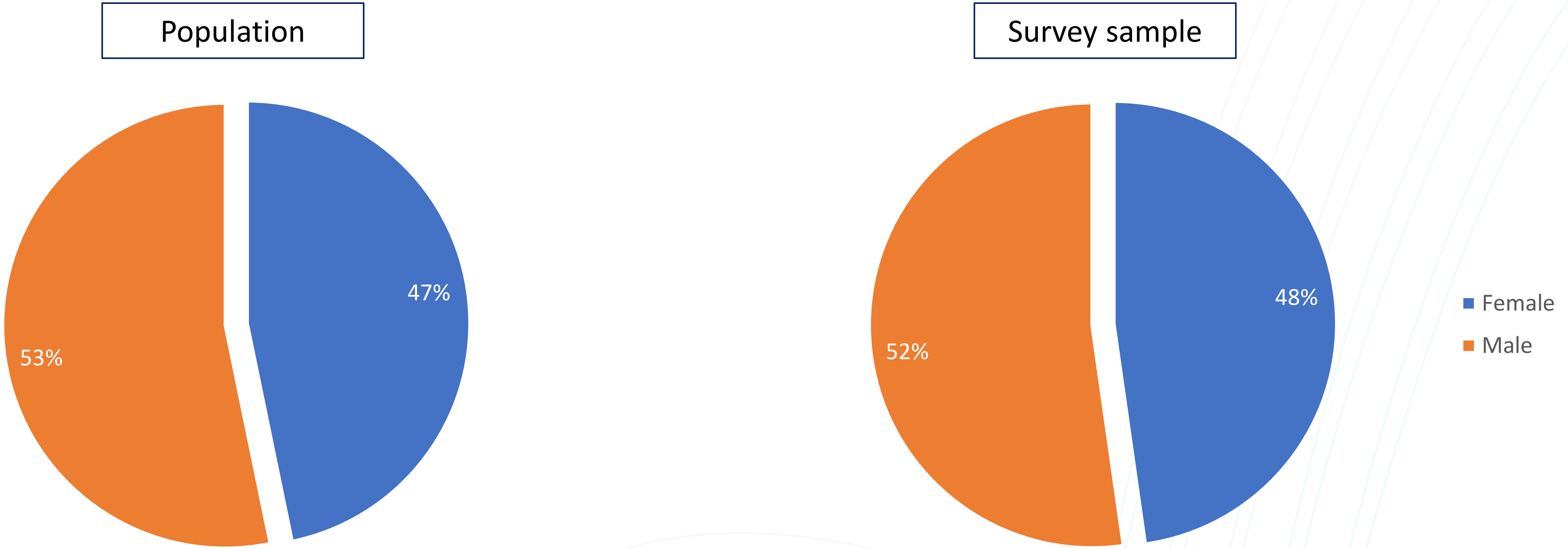
Number of households that have a bundled subscription – 325

Annex

Sample stratification (1 of 3)

Stratification of target responses - gender distribution

Population data is based on national statistics, (NSO 2025)[1]

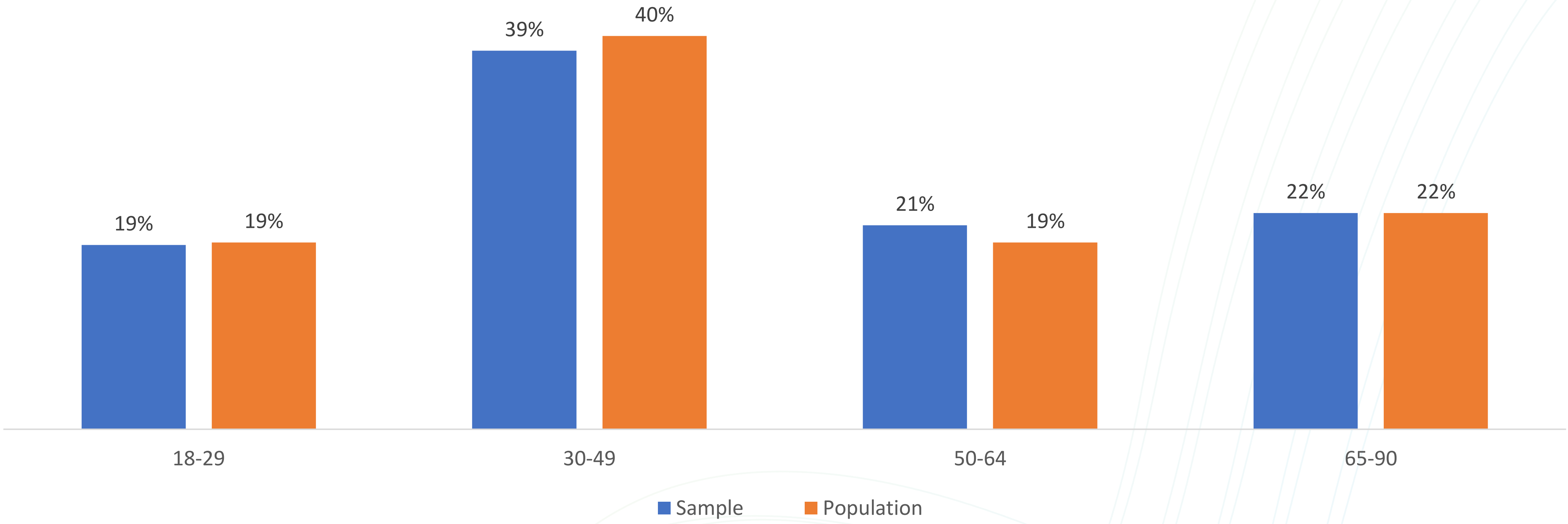


[1]*National Statistics Office Malta, 2025. World Population Day: 11 July 2025. Available at: https://nso.gov.mt/population/world-population-day-11-july-2025/ [Accessed November 3rd 2025]*

Sample stratification (2 of 3)

Stratification of target responses - age distribution

Population data is based on national statistics, (NSO 2023)[2]

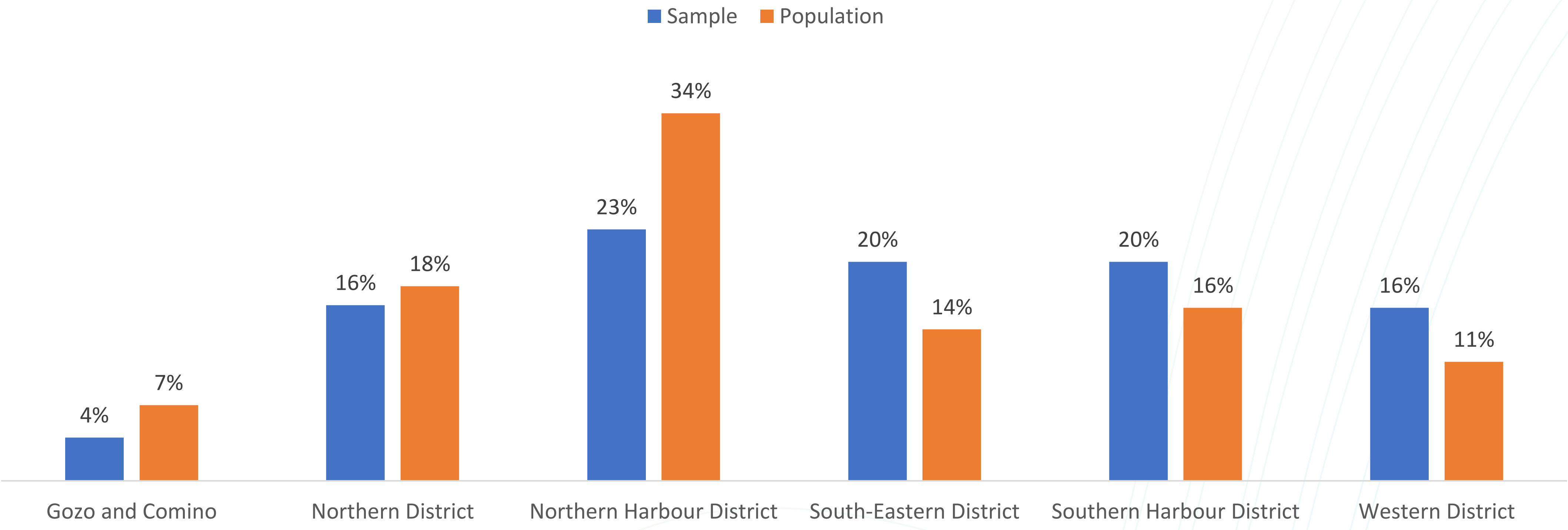


[2]National Statistics Office Malta, 2023. Census of Population and Housing 2021: Final Report: Population, migration and other social characteristics (Volume 1). 16 February. Available at: https://nso.gov.mt/themes_publications/census-of-population-and-housing-2021-final-report-population-migration-and-other-social-characteristics-volume-1/ [Accessed November 3rd 2025].

Sample stratification (3 of 3)

Stratification of target responses - location of residence distribution

Population data is based on national statistics, (NSO 2023)[3]



[3]*National Statistics Office Malta, 2023. Regional Statistics MALTA 2023 Edition. 17 July. Available at: https://nso.gov.mt/themes_publications/regional-statistics-malta-2023-edition/ [Accessed November 3rd 2025].*

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