

MCA Survey Findings for Fixed Internet

Consumer Perceptions

July 2025

MCA Reference: MCA/S/25-5644



MALTA COMMUNICATIONS AUTHORITY

Methodology



Methodology

Survey fieldwork carried out by PKF Malta between January and February 2025 on behalf of MCA

Fieldwork	Sample	Responses
<ul style="list-style-type: none">• 400 respondents were randomly selected.• Of these, 252 were surveyed online, while 148 participated via telephone interviews.• Only one person per household was interviewed, all aged 18 or older.	<ul style="list-style-type: none">• Target respondents were stratified based on the age composition of the Maltese population.• Respondents were distributed across Malta's geographical regions, socio-economic categories of the Maltese population and according to broadband market share.	<ul style="list-style-type: none">• 400 net respondents completed the survey.• The margin of error: +/- 4.9% at a 95% confidence interval.

Key Insights

- Internet usage is nearly universal among residential users, with **99% of survey respondents making use of this service**.
- The number of **respondents subscribed to more than one internet service provider has increased** from 2% in 2022 to 5% in 2025.
- Respondents are placing more **importance on price** when selecting their broadband packages.
- 83% of fixed broadband subscribers **obtain this service in a bundle**.
- Four out of five respondents have broadband **plans supporting download speeds of 100 Mbps or higher**.
- The majority of respondents (82%) consider their fixed broadband connection speeds as **adequate for daily needs**.
- **Spending patterns have improved**, with those spending over €50 per month dropping from 49% in 2022 to 13% in 2025.
- Almost all fixed broadband users **(99%) make use of OTT services**, up from 87% in 2022.

Access and Usage

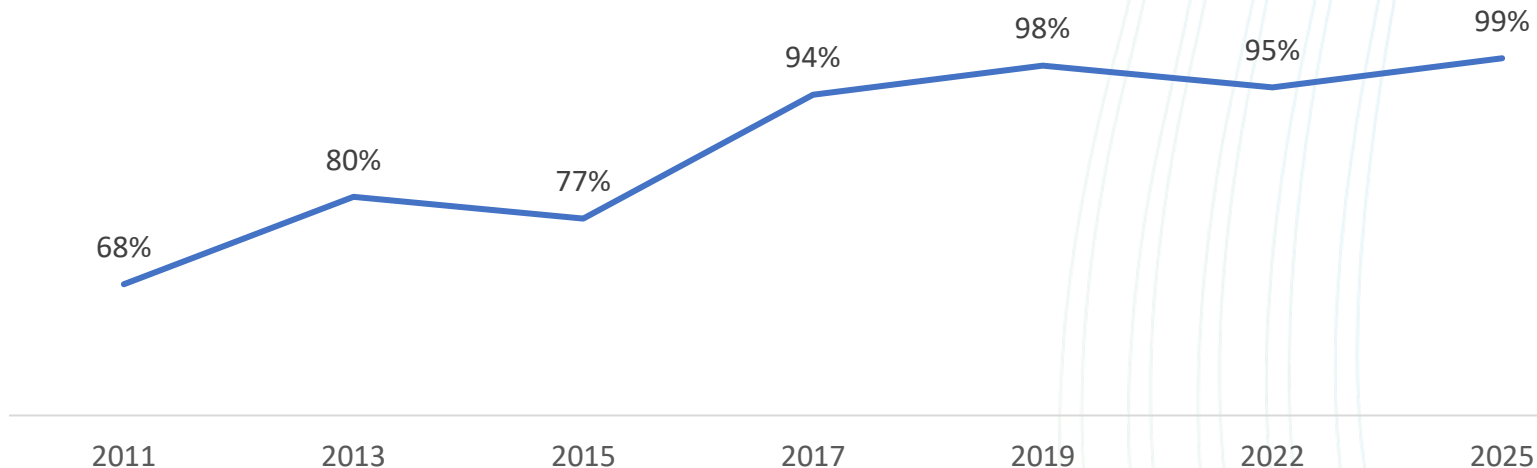


Accessibility to the Internet (1 of 5)

Availability of internet connectivity in Maltese households

Number of respondents with fixed broadband subscription – 396

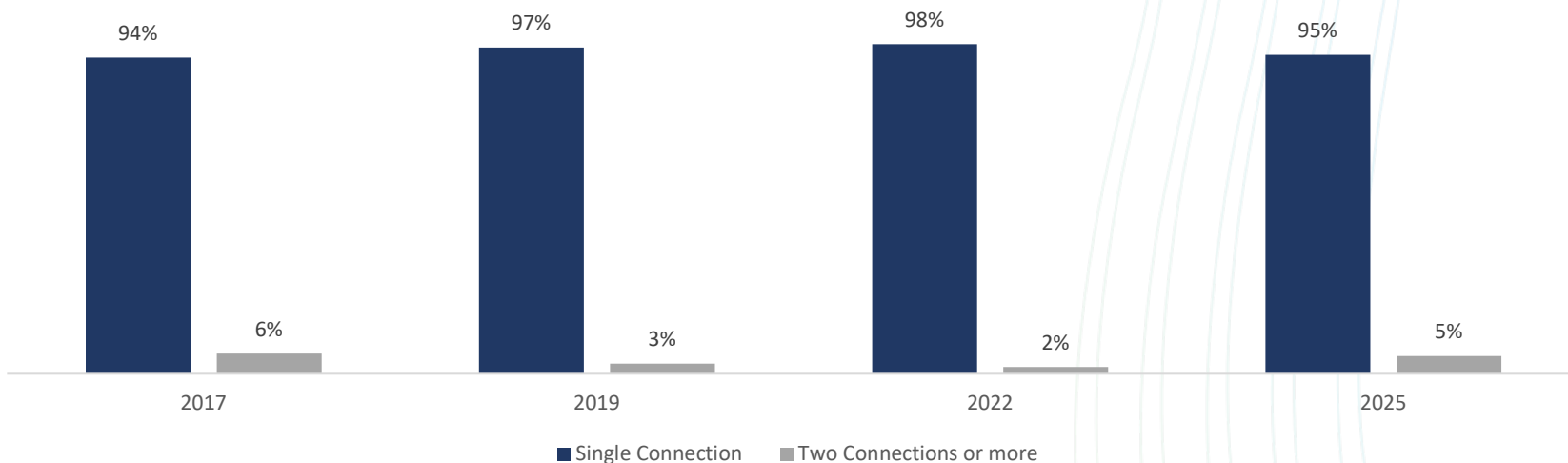
i.e. 99% of the total number of respondents



Accessibility to the Internet (2 of 5)

Number of connections at home

Number of respondents with internet - 396

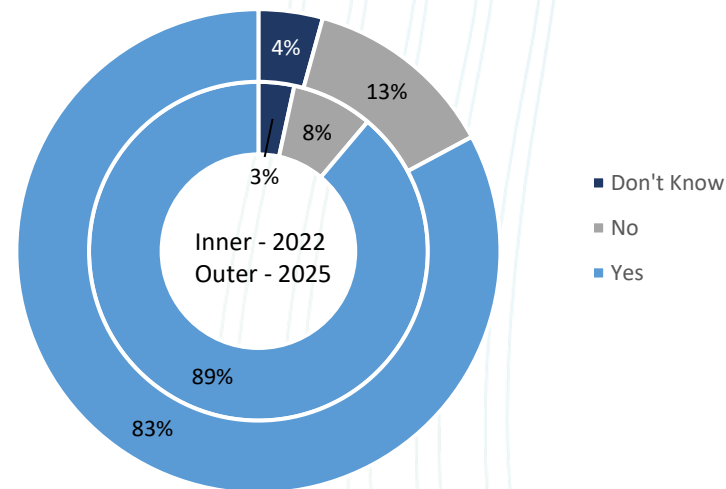


Accessibility to the Internet (3 of 5)

Number of subscriptions purchasing their broadband in a bundle

Number of respondents with an internet connection – 396

- 83% of households with internet acquire the service in a bundle.
- This represents a decrease of 6 percentage points from 2022.

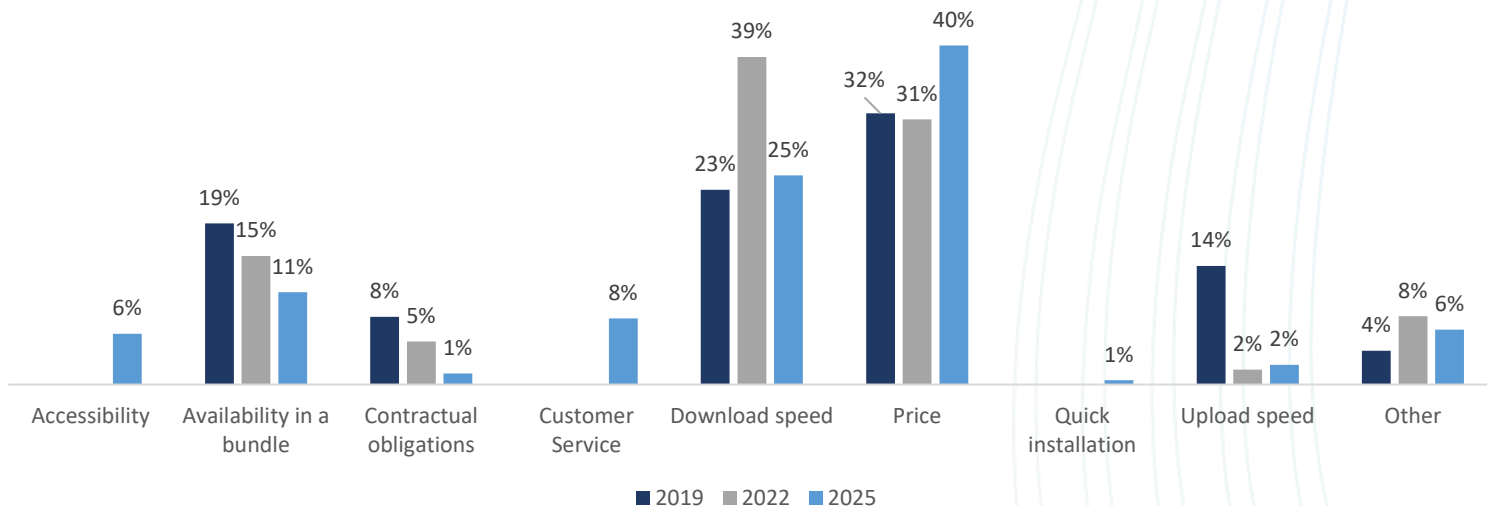


Accessibility to the Internet (4 of 5)

Factors determining end-users' choices

Number of respondents with a fixed broadband connection in their household – 396

* 'Accessibility', 'customer service' and 'quick installations' were not part of the options in the 2019 and 2022 questionnaires.



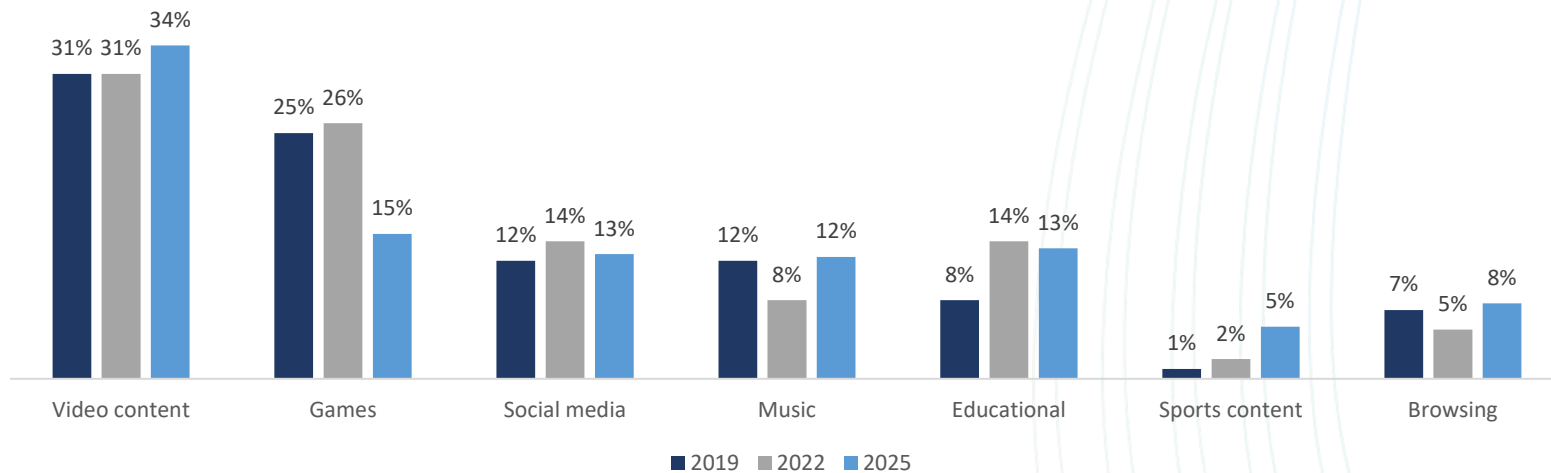
Accessibility to the Internet (5 of 5)

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

Number of respondents reporting internet use by someone under 18 years of age within their household – 82

* Respondents were asked whether there are any individuals under the age of 18 within their household. If they answered affirmatively, follow-up questions assessed the reasons for and type of fixed internet use by these individuals.

* Respondents could provide multiple answers.



Download Speed and Technology



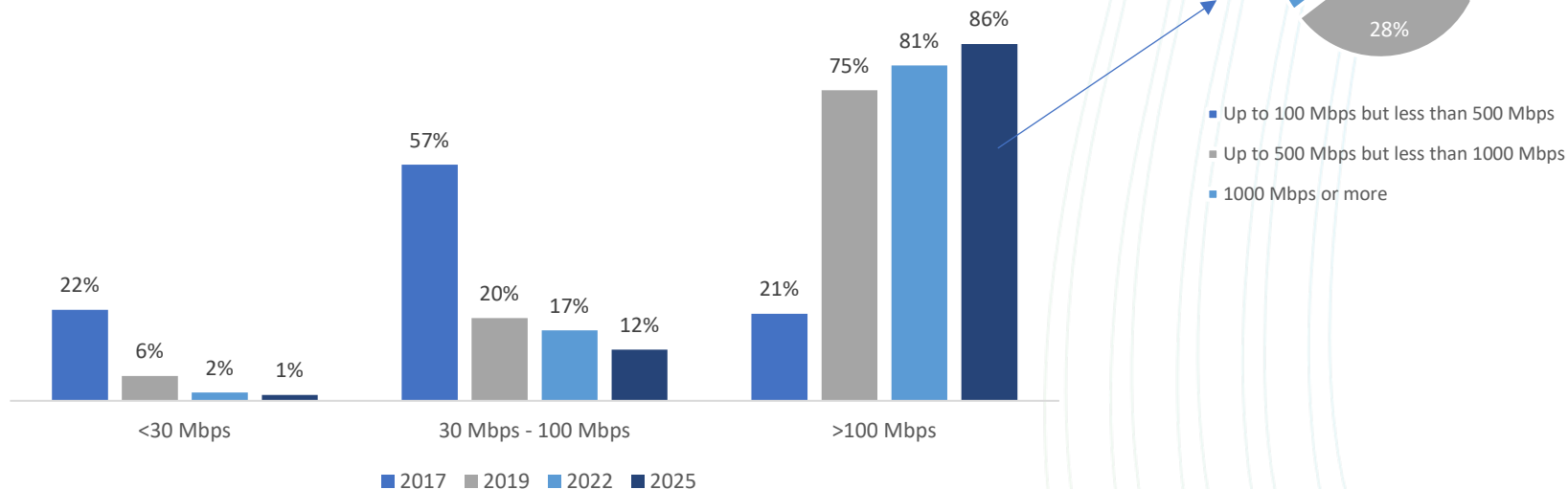
Internet download speed (1 of 3)

Available download speed

Number of respondents knowing their download speed – 210

i.e., 53% of respondents with an internet connection

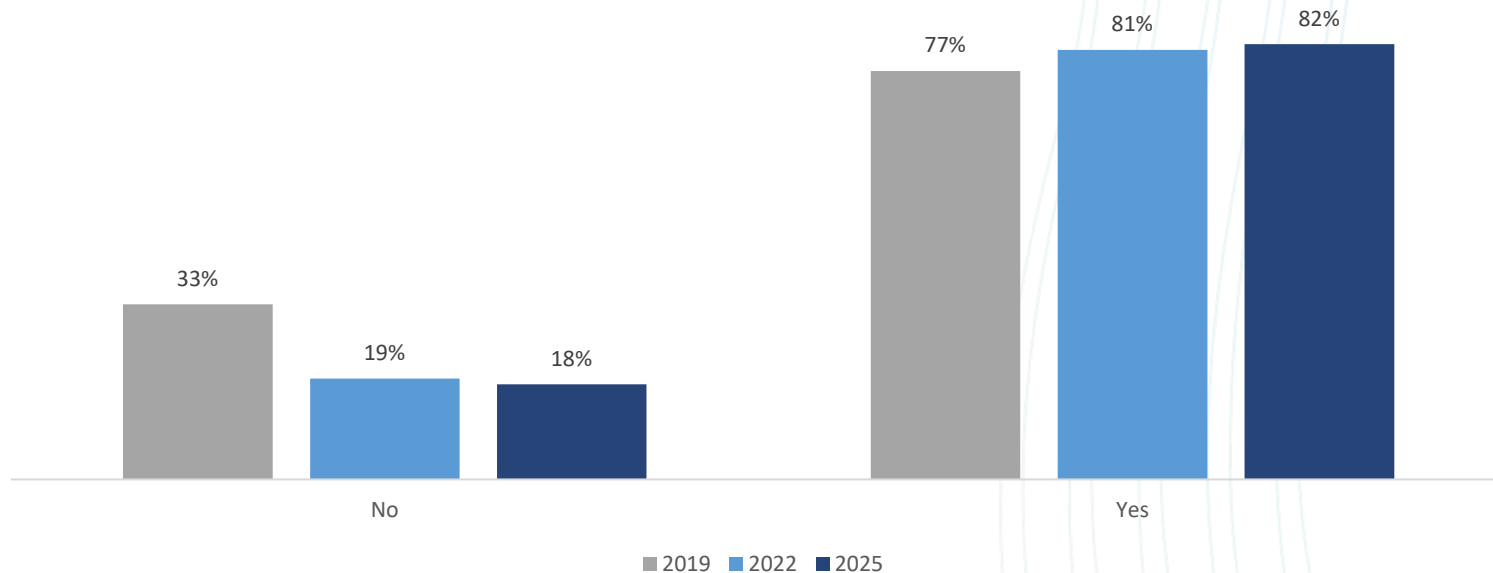
** Over the years, local operators have improved their fixed broadband offerings, offering higher speeds. In turn, speed categories were split differently in the 2017, 2019, and 2022 questionnaires*



Internet download speed (2 of 3)

Perceived adequacy of download speeds

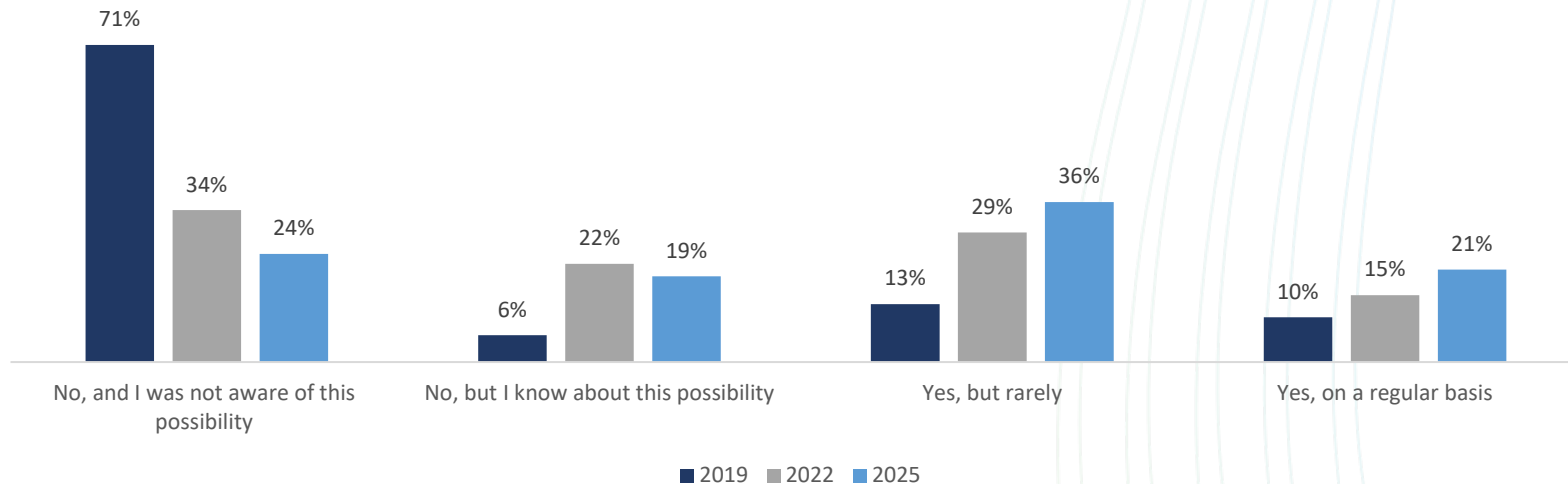
Number of respondents – 396



Internet download speed (3 of 3)

Propensity to test download speed

Number of respondents with a fixed broadband connection – 396



Expenditure and Satisfaction

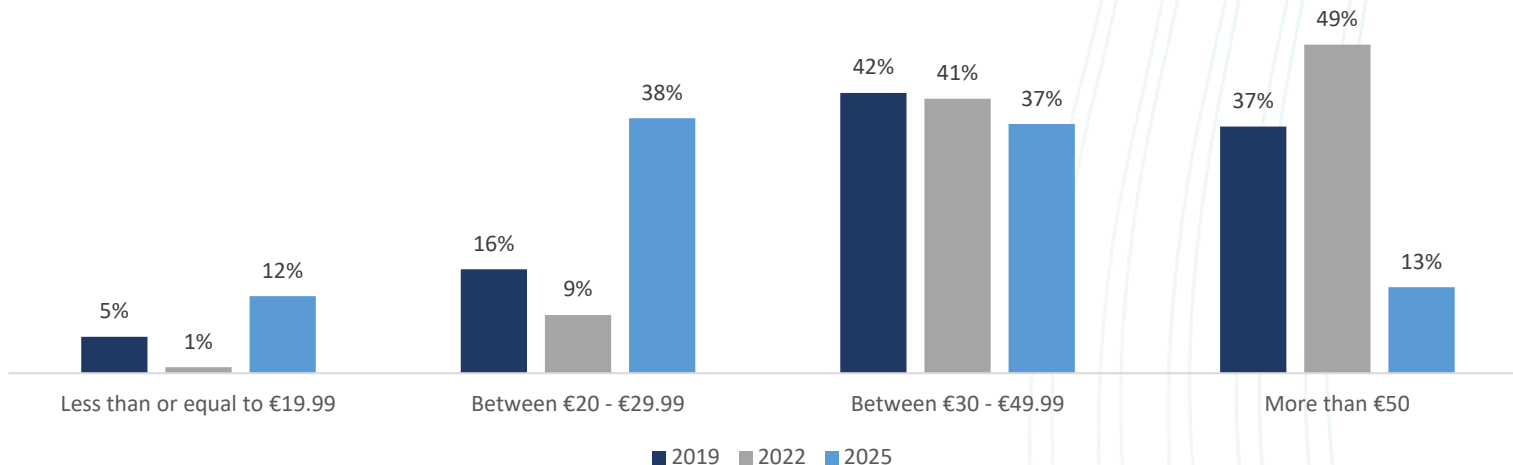


Expenditure on the fixed internet service

Average monthly expenditure on main internet subscription

Number of respondents with an internet connection knowing their monthly expenditure – 225

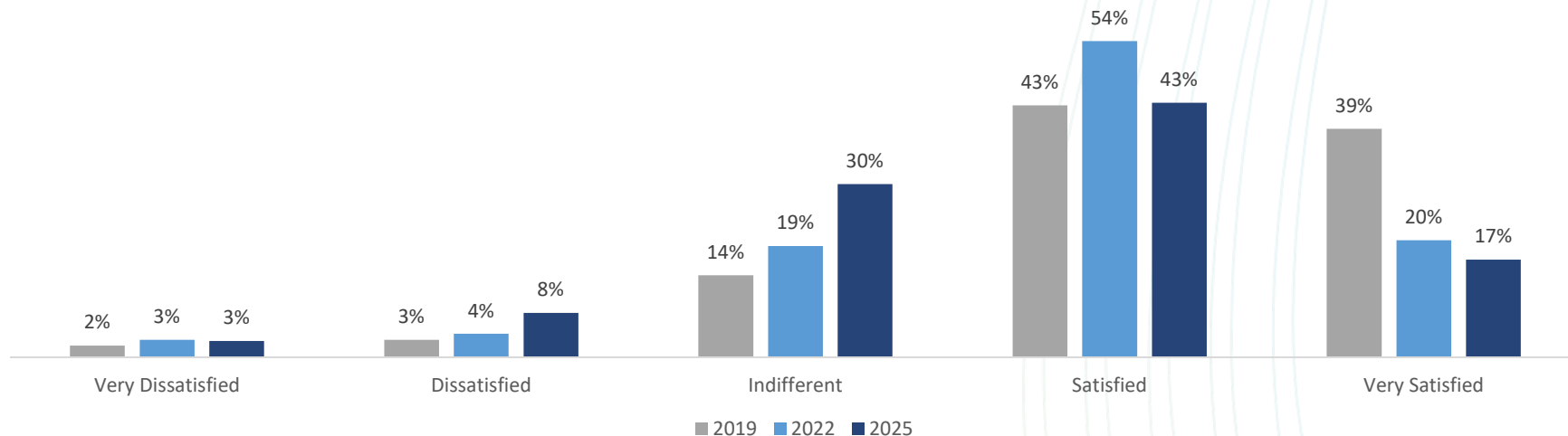
i.e. 57% of respondents with an internet connection



Satisfaction with quality of service

Perceived satisfaction with main internet subscription

Number of respondents with an internet connection – 396



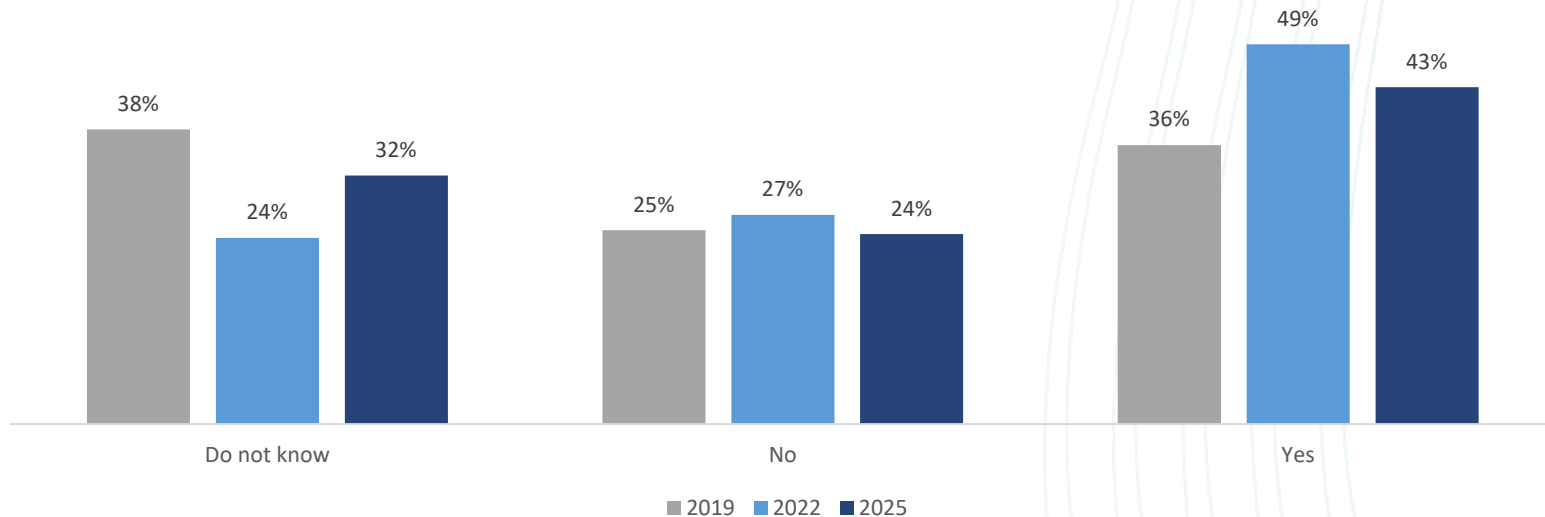
Switching



Switching (1 of 3)

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

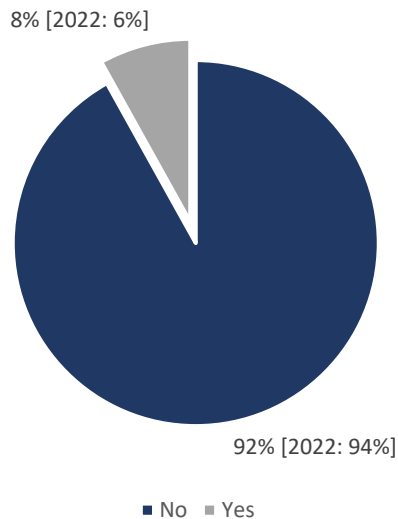
Number of respondents with an internet connection - 396



Switching (2 of 3)

Share of respondents switching provider in the last two years

Number of respondents with an internet connection - 396

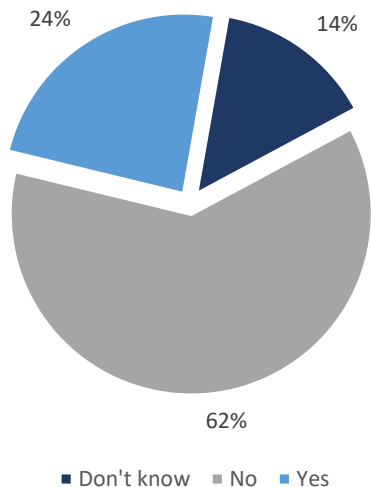


- Amongst the 364 respondents (92%) who did not switch their service provider in the past two years, the following reasons were cited:
 - Satisfied with their current provider (48%)
 - Logistical inconvenience to remove and install a new service (27%)
 - Subscription is part of a bundle (24%)
 - Lack of options/competitiveness in the market (24%)

Switching (3 of 3)

Share of respondents considering switching in the future

Number of respondents with an internet connection - 396



- 24% of respondents would consider switching their service provider in the future.
- Among those that do *not* consider switching, the following reasons were cited:
 - It is an inconvenience to change service provider (39%)
 - Loyalty and longtime consumers (27%)
 - Subscriptions forms part of their bundle (24%)
 - Lack of options/competitiveness in the market (22%)

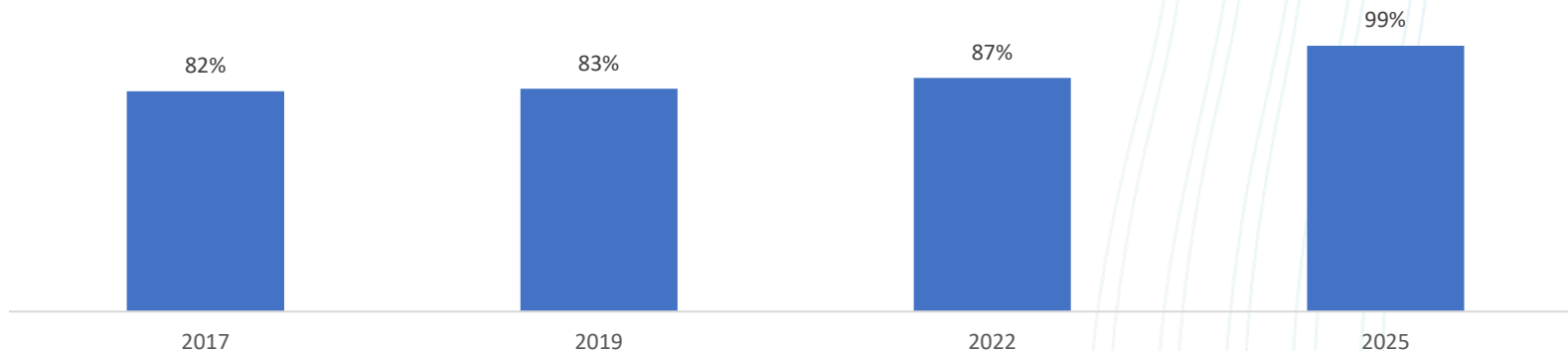
OTT usage over fixed internet



OTT service usage (1 of 3)

Usage of OTT services over fixed internet

Number of respondents with a fixed internet connection - 396



- 99% of respondents make use of OTT services over a fixed internet connection.
- The 1% who do not use OTT services are aged 65-90 years, with the main reason being that it is too complicated or that they are well-served by *traditional* services.

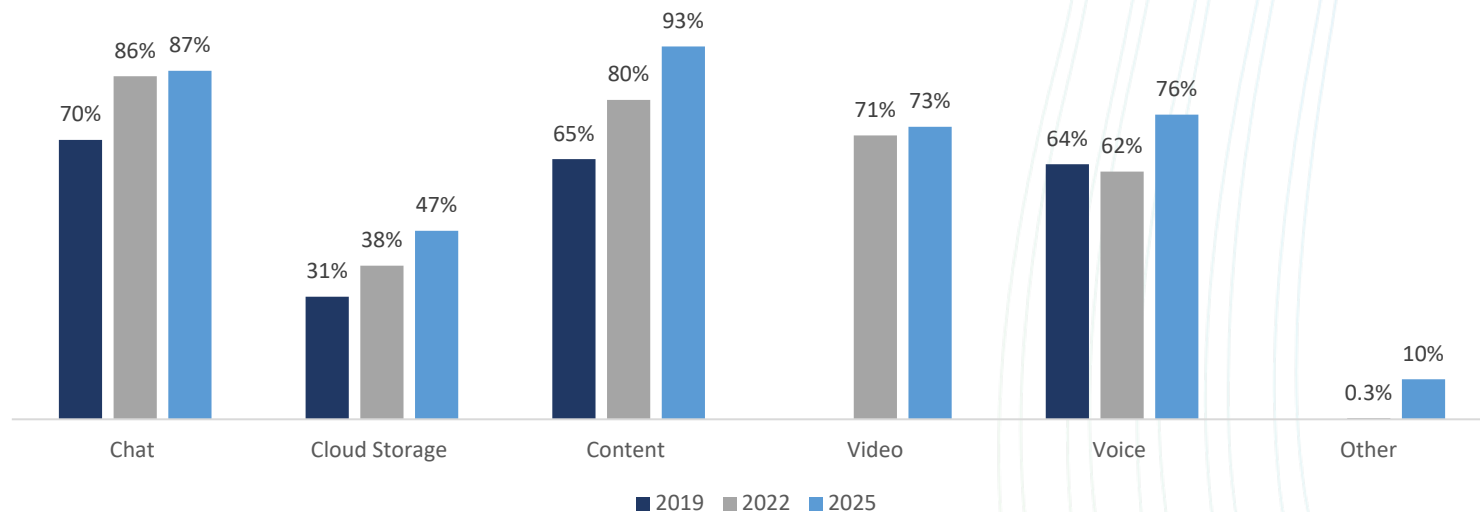
OTT service usage (2 of 3)

Types of OTT services used

Number of respondents with making use of OTTs over a fixed internet connection – 392

i.e. 99% of the number of respondents having a fixed internet connection at home

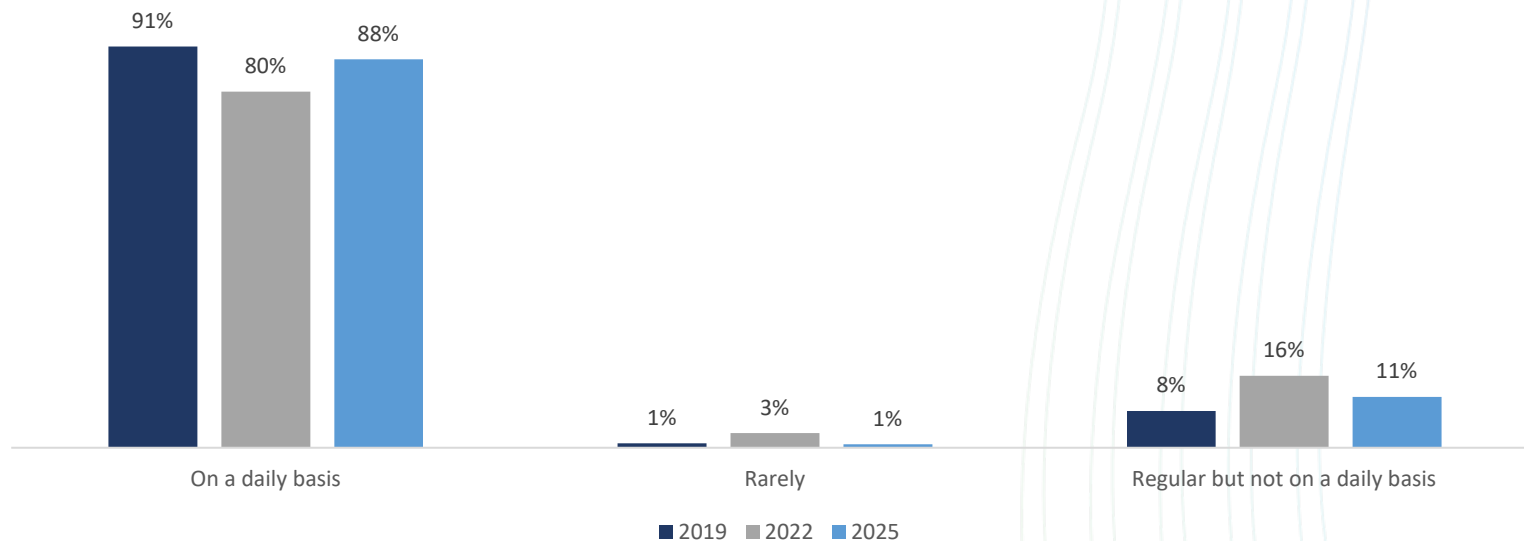
** Questions were ranked by importance*



OTT service usage (3 of 3)

Frequency of use of OTTs over fixed internet

Number of respondents with making use of OTTs over a fixed internet connection – 392





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