MCA Survey Findings for Fixed Telephony

Consumer Perceptions

September 2025

MCA Reference: MCA/S/25-5721

MALTA COMMUNICATIONS AUTHORITY

Methodology

Fieldwork and Sampling

PKF Malta carried out fieldwork between March and April 2025 on behalf of MCA		
Fieldwork	**Sample**	**Responses**
• Randomly selected. • Surveyed online - 245 / Surveyed via telephone interviews - 155. • Only one person per household interviewed, aged 18 or older.	• Stratified by age composition of the Maltese population. • Distributed across Malta's geographical regions and socio-economic categories. • Based on market share of service operators (weighting applied to overall responses to reflect actual market composition).	• 400 net respondents. • Margin of error: +/- 4.9% • Confidence interval: 95%.

Weighted survey data findings

Weighting formula

$$Weight = \frac{Market\ share\ (\%)}{Sample\ share\ (\%)}$$

- Weights were determined using the formula above to adjust for over- or under-representation of each operator in the sample.
- These weights were applied to each respondent based on their main operator to ensure the results reflect the actual market distribution.
- Raw sample sizes indicated in the slide headings are provided for reference. However, all results presented in the charts are based on weighted data. This approach is applied consistently throughout the report.

Key Insights

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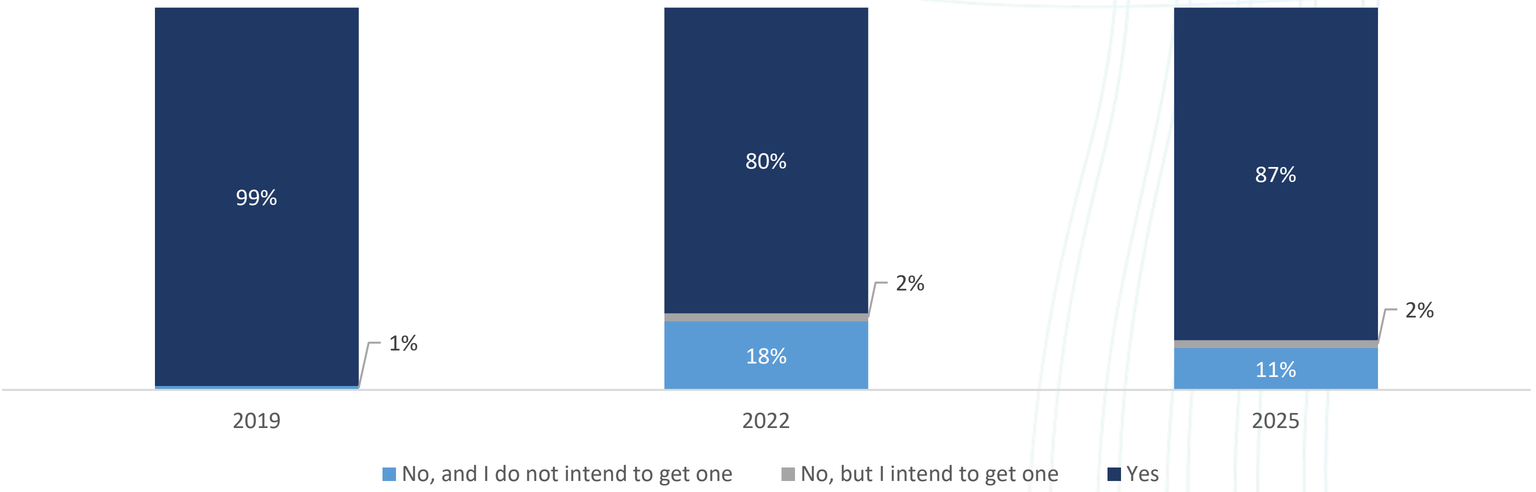
- Fixed telephony services are available to 87% of survey respondents, **although about half do not actively use the service**.
- Three quarters of fixed telephony users have **bundled these services with other telecom services**.
- Respondents reported being **satisfied (32%) or very satisfied (45%) with the quality of services**.
- **More people have switched their service provider** in the past two years, but fewer users have **ported their numbers**.
- Switching is **largely motivated by seeking to enhance network quality (30%), incentives to bundle the service (27%) and cost savings (25%)**.

Access and Usage

Take-up of the fixed telephony service

Total number of respondents – 400

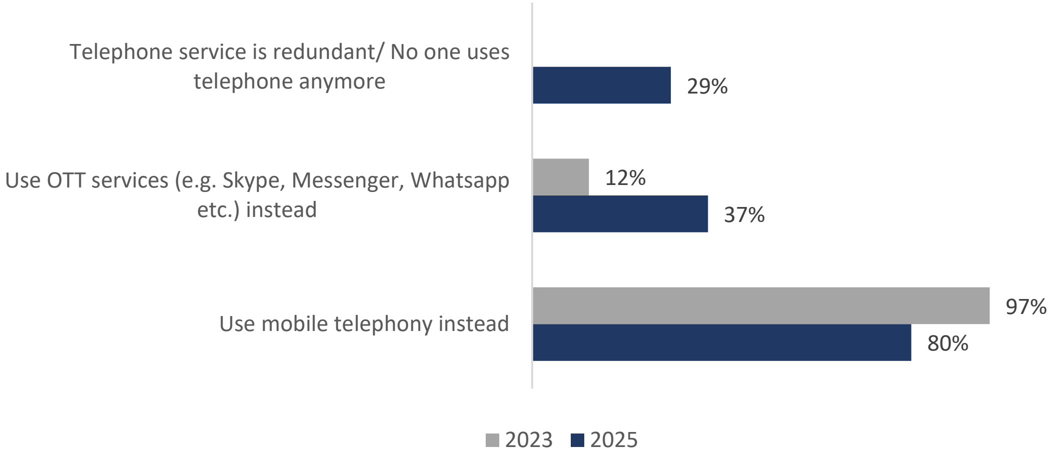


- While the access of fixed telephony remains high at 87% in 2025, usage is relatively low, with about half (49%) of those having a fixed telephony service not making use of it.

Non-subscribers to fixed telephony

Number of respondents not subscribed to the fixed telephony service – 51
i.e. 13% of total respondents

** 'Telephone service is redundant' was not part the 2023 questionnaire.*

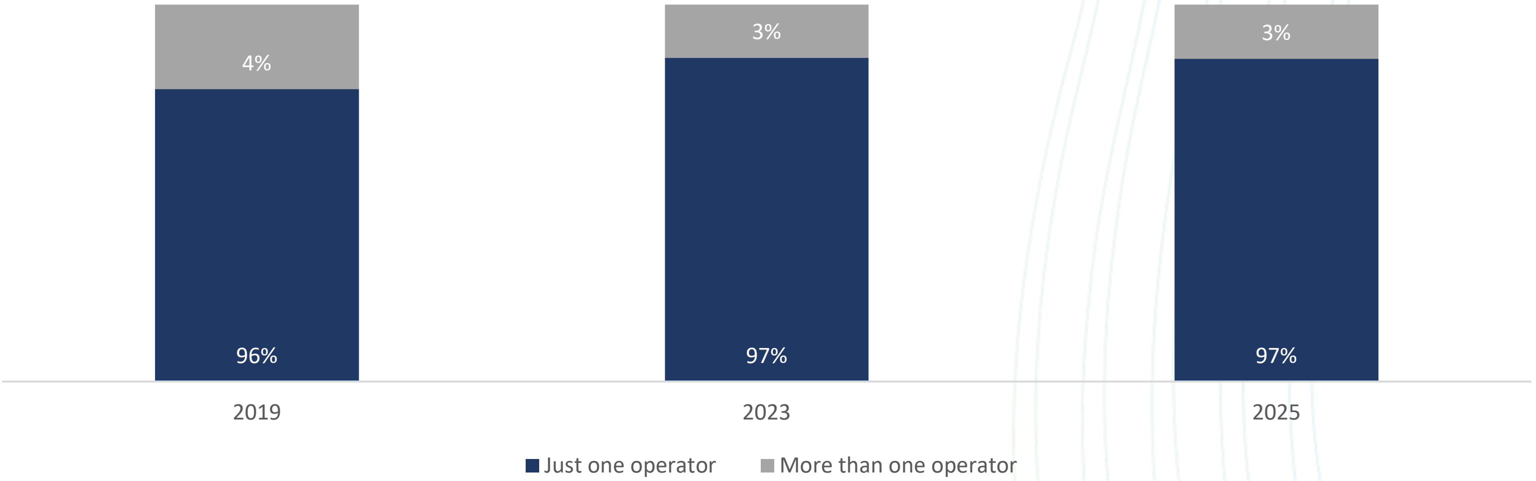


- Use of mobile is a predominant factor for not subscribing to a fixed telephony service.
- Use of OTT services is a secondary factor.

Respondents with multiple subscriptions

Number of respondents with multiple fixed telephony subscriptions – 10
i.e. 3% of all respondents with a fixed telephony subscription

** Figures should be interpreted with caution due to the small sample size.*

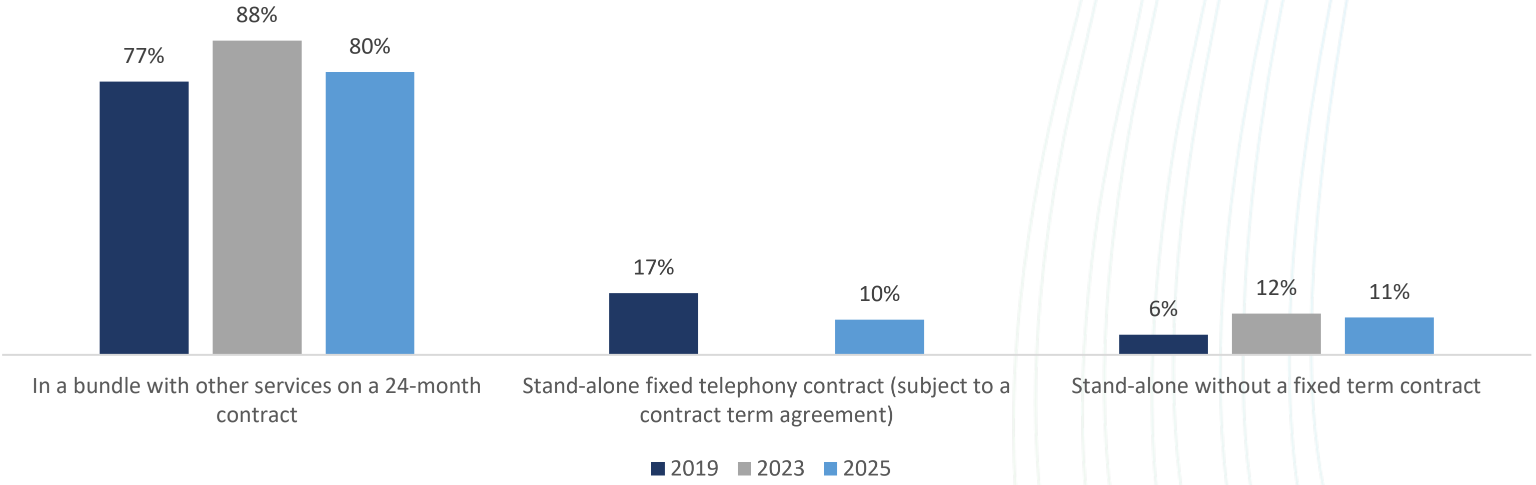


Type of subscription

Number of respondents with fixed telephony subscription – 349

i.e. 87% of the total number of respondents

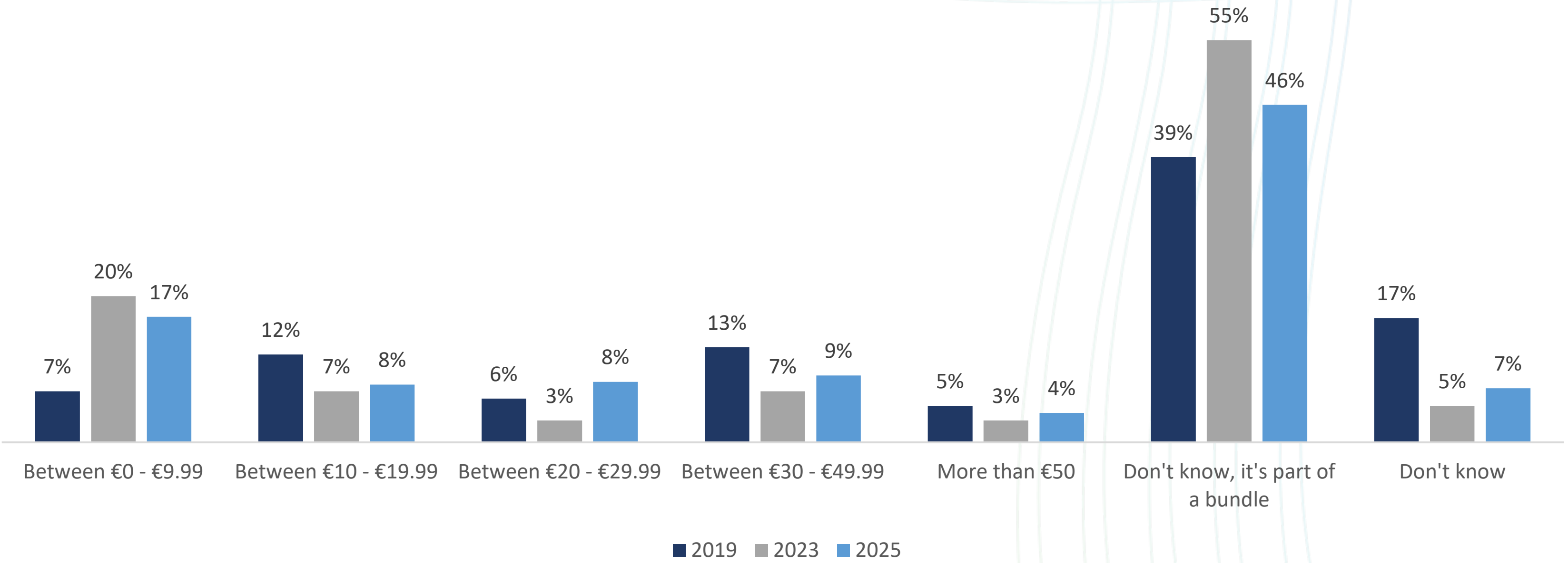
** 'Stand-alone without a fixed term contract' was not part the questionnaire in the 2023 survey.*
** 8% of respondents indicated that they were not aware of their subscription type. These were excluded from the analysis.*



Expenditure, Quality of Service and Switching

Average monthly expenditure on main subscription

Number of respondents with fixed telephony subscription – 349
i.e. 87% of the total number of respondents



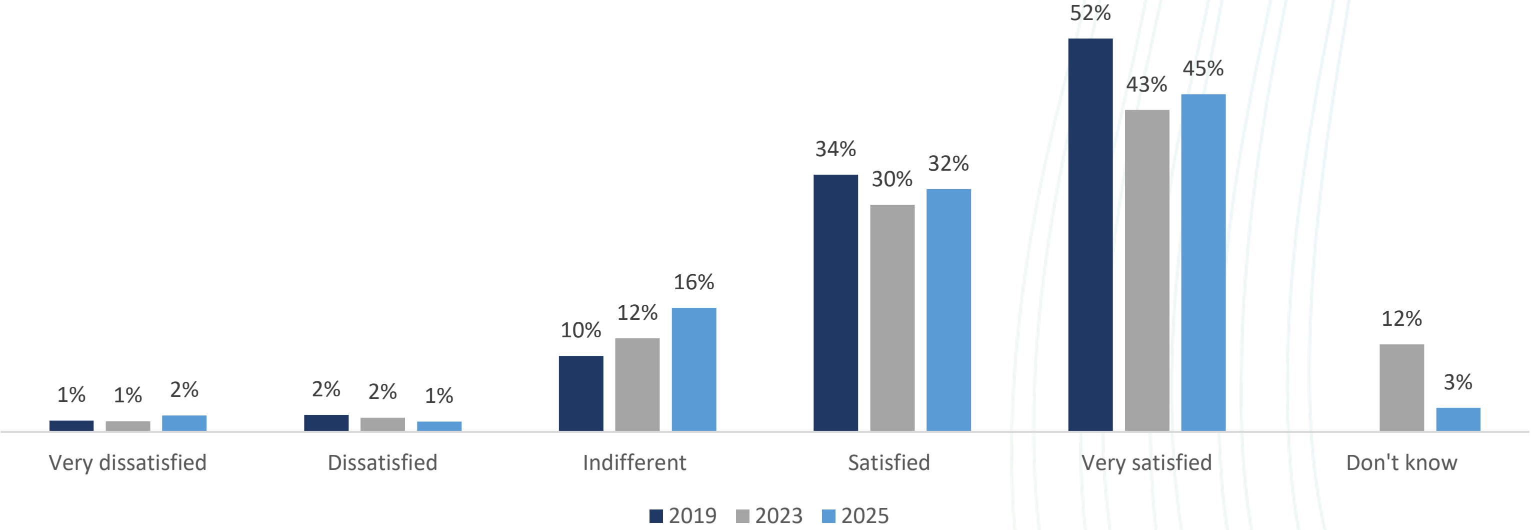
Quality of service

Level of satisfaction with main fixed telephony subscription

Number of respondents with a fixed telephony subscription who use it regularly – 157

i.e. 39% of the total number of respondents

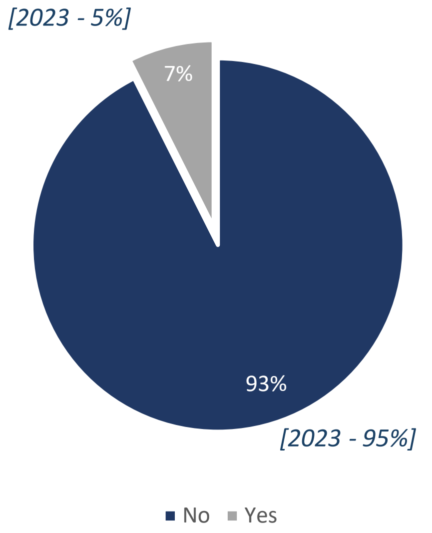
** This question was only prompted to respondents who make regular use of the service.*



Switching and porting (1 of 4)

Switching behaviour in the last two years

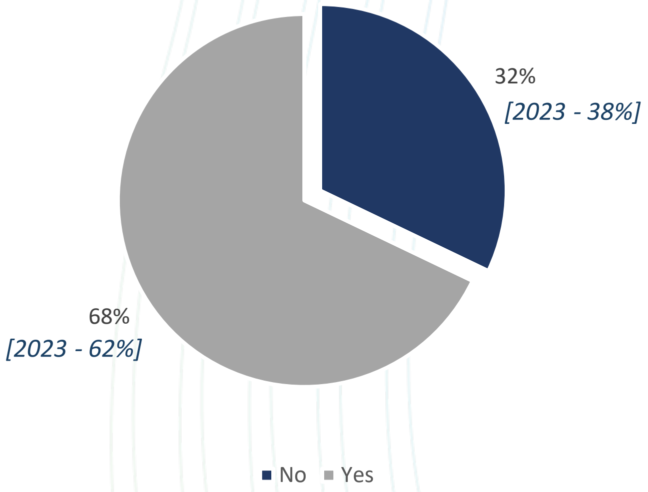
Number of respondents with fixed telephony subscription – 349



Porting of numbers when switching

Number of respondents that switched service provider in the last two years - 23

** Figures should be interpreted with caution due to the small sample size*

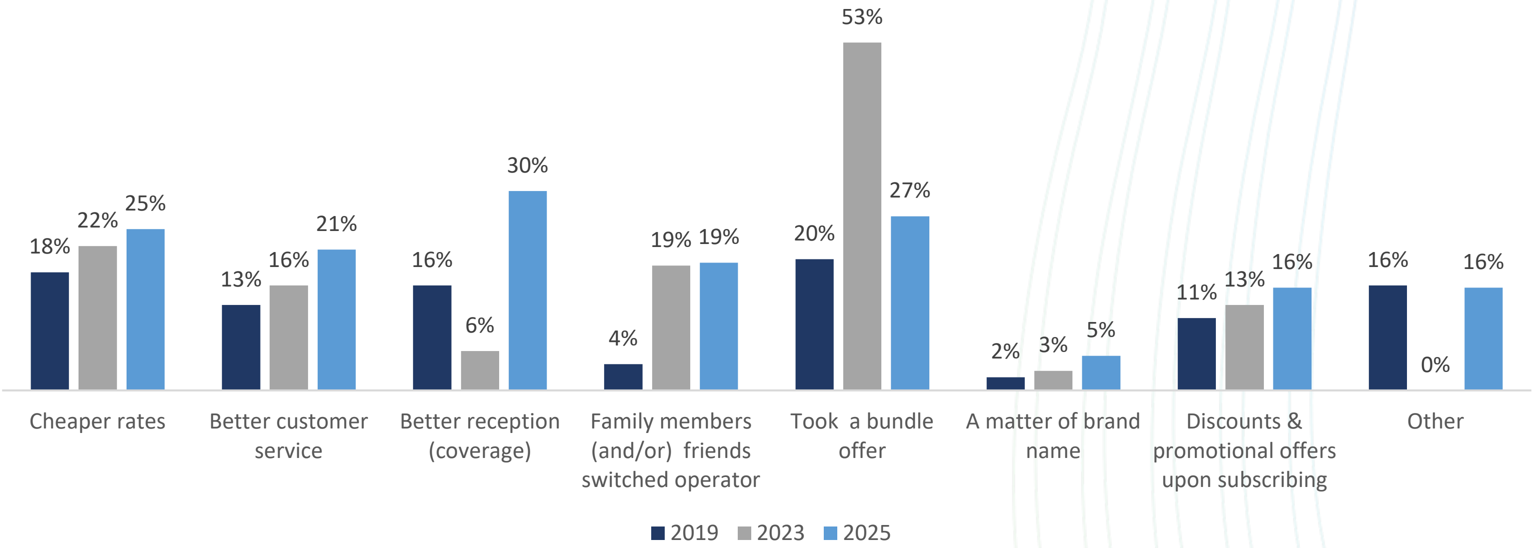


Switching and porting (2 of 4)

Reasons for switching/changing the fixed telephony operator

Number of respondents that switched service providers in the last two years – 23

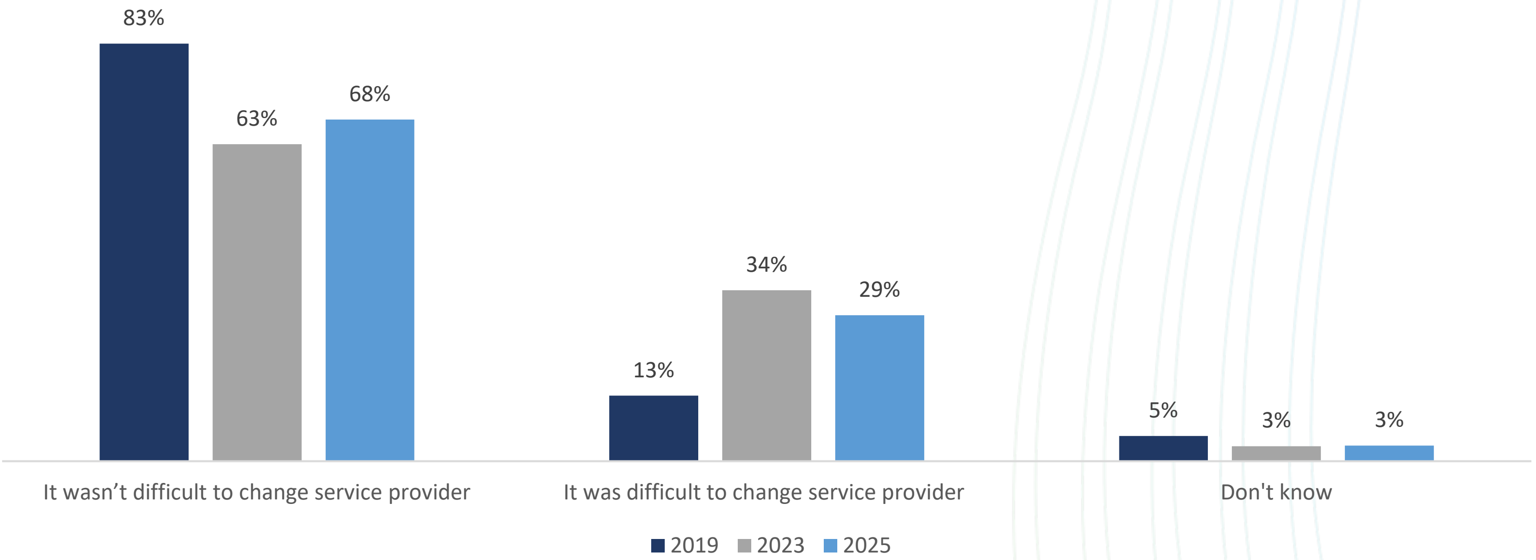
** Respondents could provide multiple responses*



Switching and porting (3 of 4)

Assessing the difficulty of switching service provider

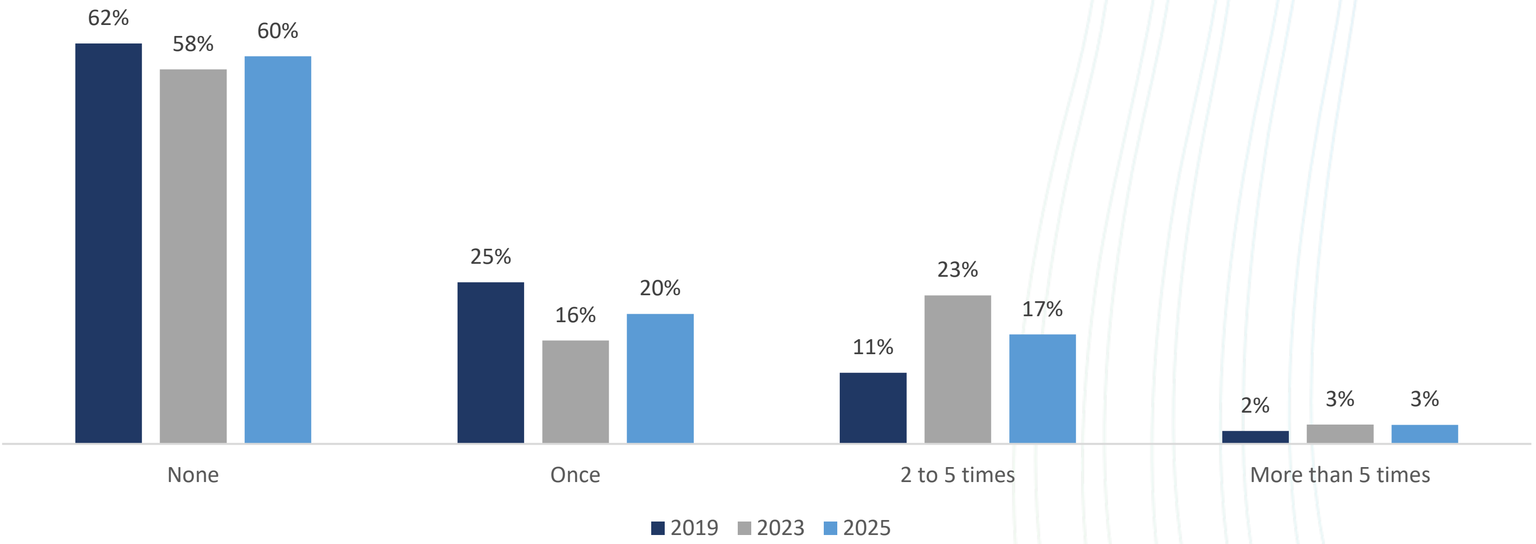
Number of respondents that switched service providers in the last two years – 23



Faults and disconnections in the last 12 months (1 of 2)

Service faults experienced with main provider

Number of respondents with a fixed telephony subscription – 349
i.e. 87% of the total number of respondents

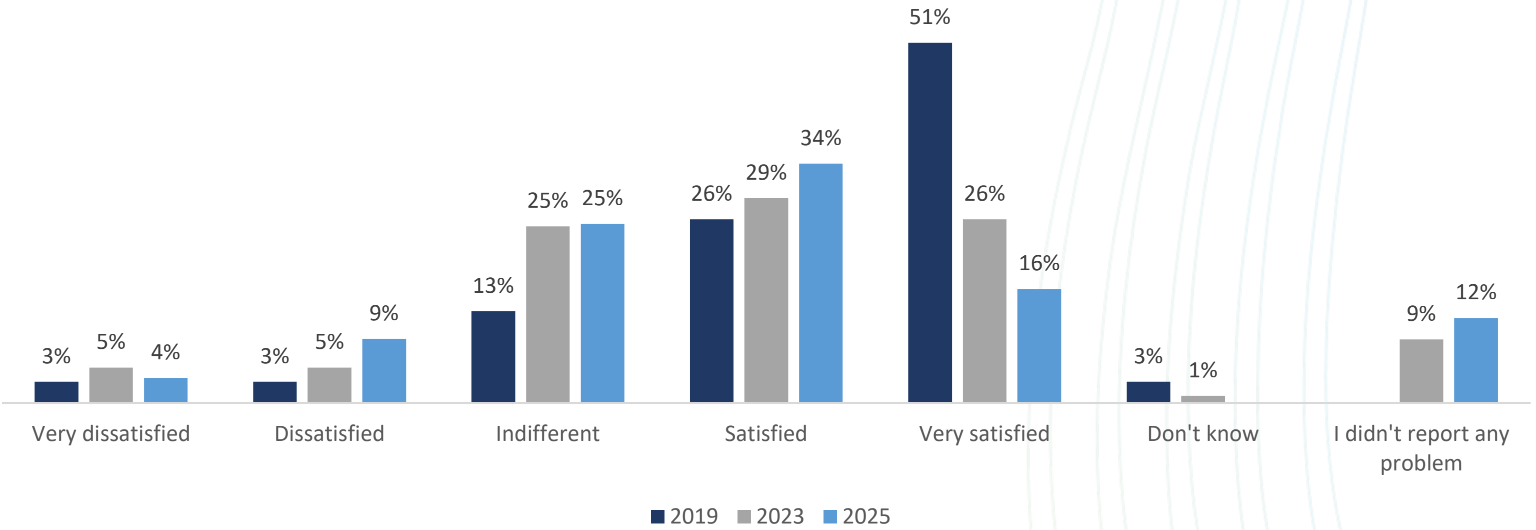


Faults and disconnections in the last 12 months (2 of 2)

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

Number of households that have reported at least one fault in the last 12 months – 139

* *'Don't know' was not an option in the 2025 questionnaire.*



Termination of Service and Alternatives

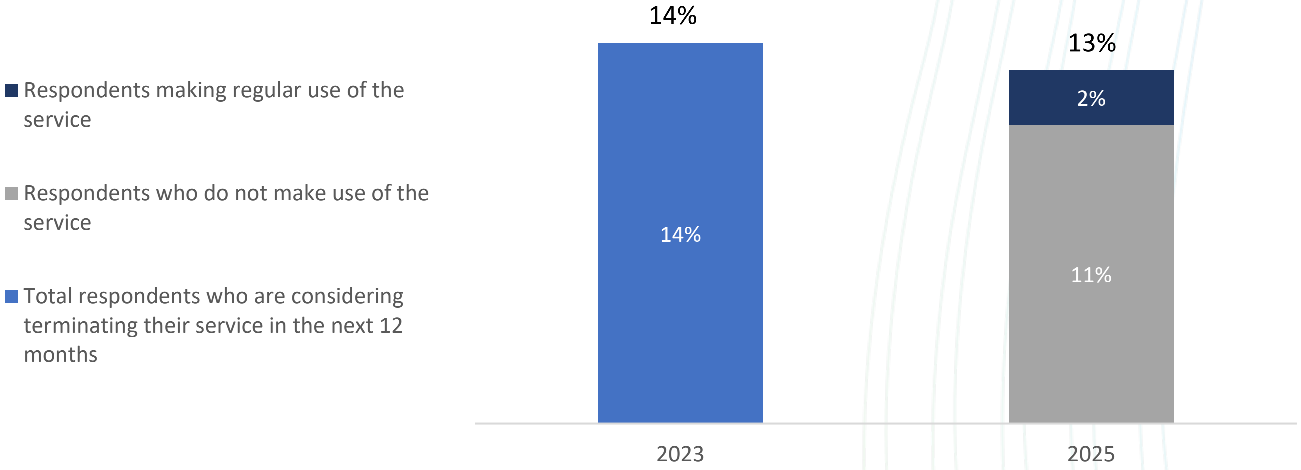
Termination of services and alternatives (1 of 5)

Respondents reportedly willing to terminate their service within the next 12 months

Number of respondents with fixed telephony subscription – 349

i.e. 87% of the total number of respondents

** Respondents were not asked about their frequency of use in earlier surveys.*



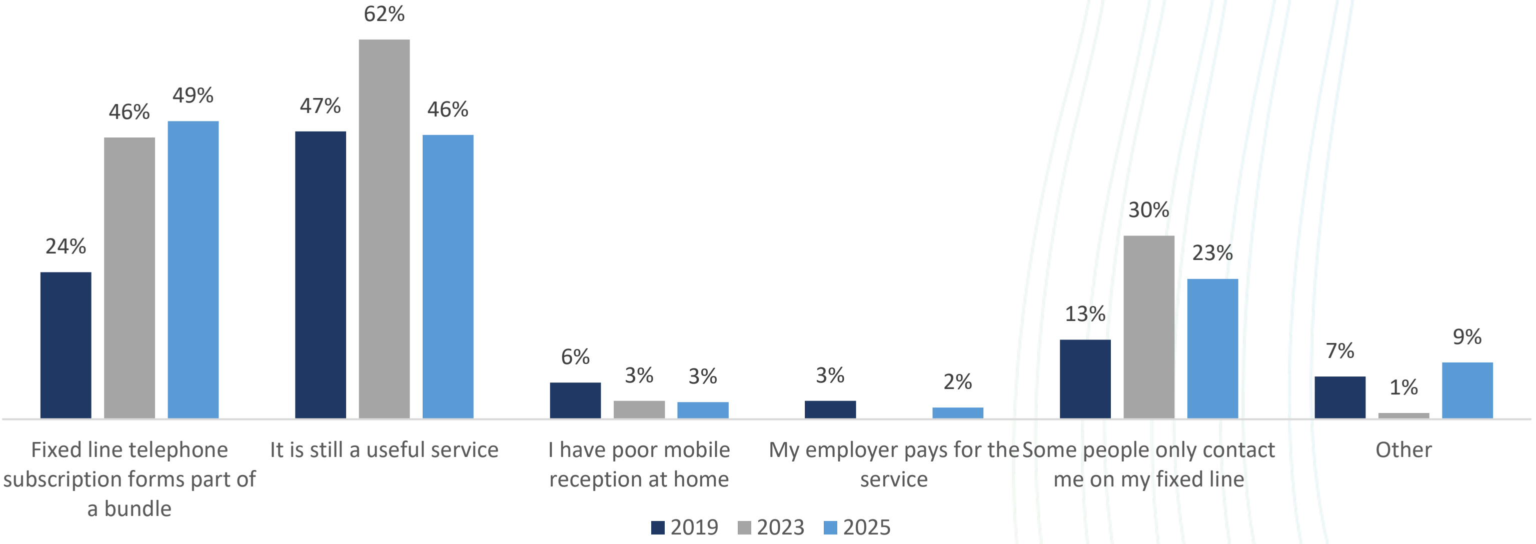
Termination of services and alternatives (2 of 5)

Reasons for not terminating fixed line connection

Number of respondents that would not terminate fixed line connection – 235

i.e. 67% of the total number of respondents

** Respondents could provide multiple responses.*



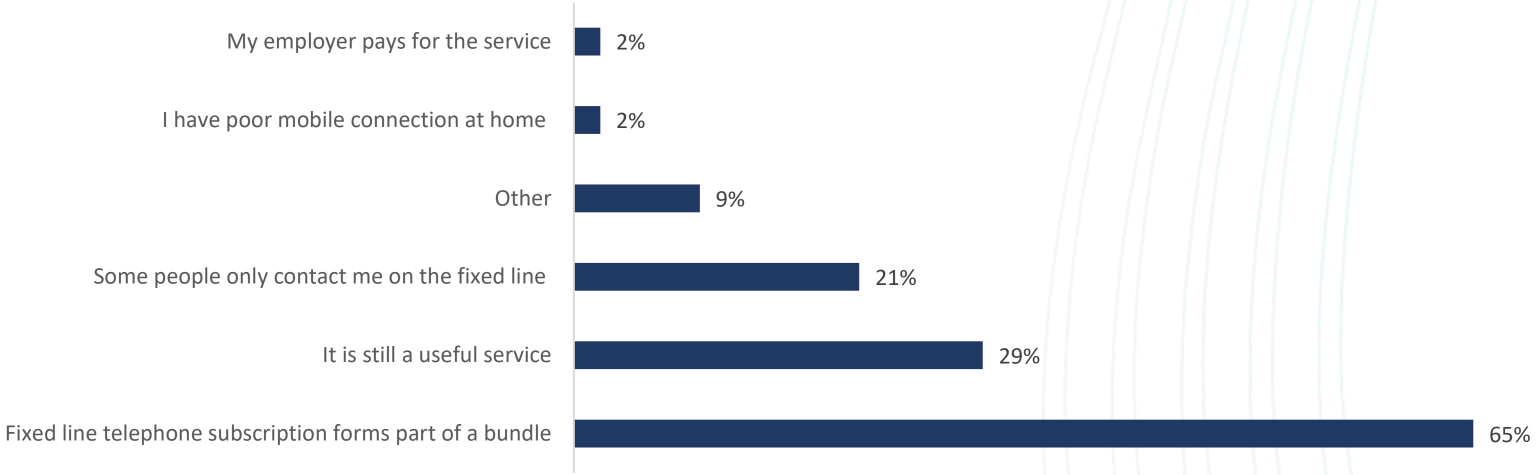
Termination of services and alternatives (3 of 5)

Reasons for not terminating fixed line connection if no use of the service is being made

Number of respondents that would not terminate fixed line connection even though they do not make use of the service – 108

i.e. 56% of the total respondents who do not make use of the service even though they have access to it

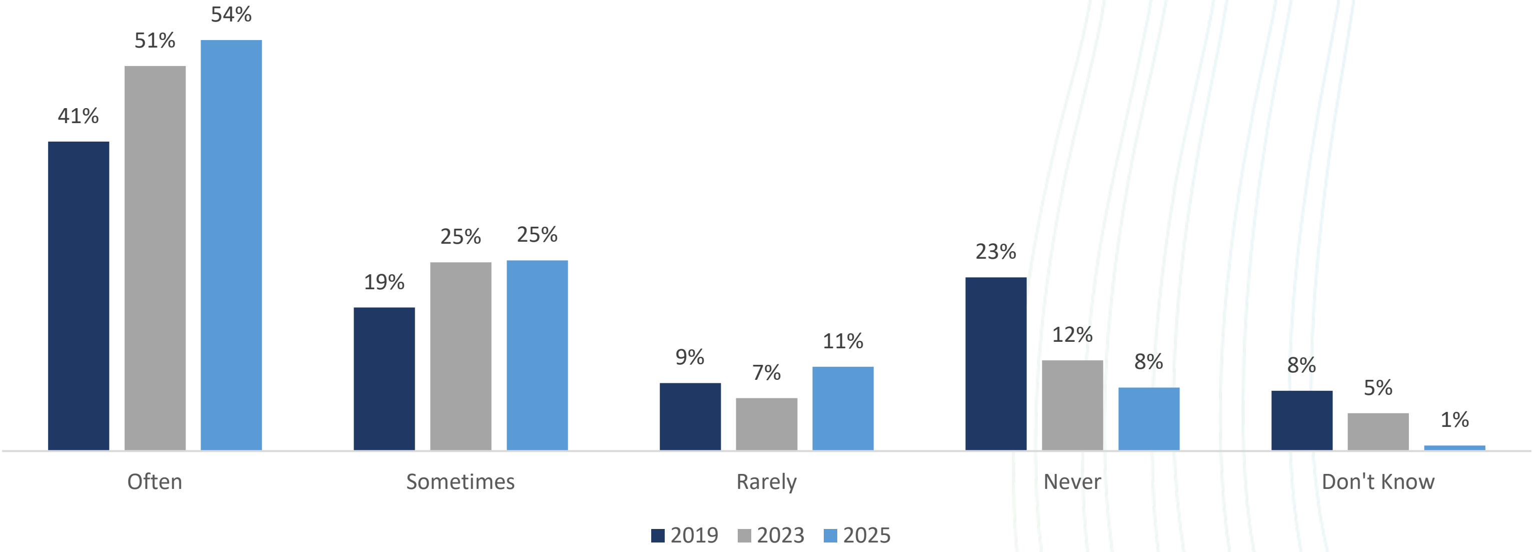
** Respondents could provide multiple responses.*



Termination of services and alternatives (4 of 5)

Use of OTT call services

Number of respondents with fixed telephony subscription – 349
i.e. 87% of the total number of respondents

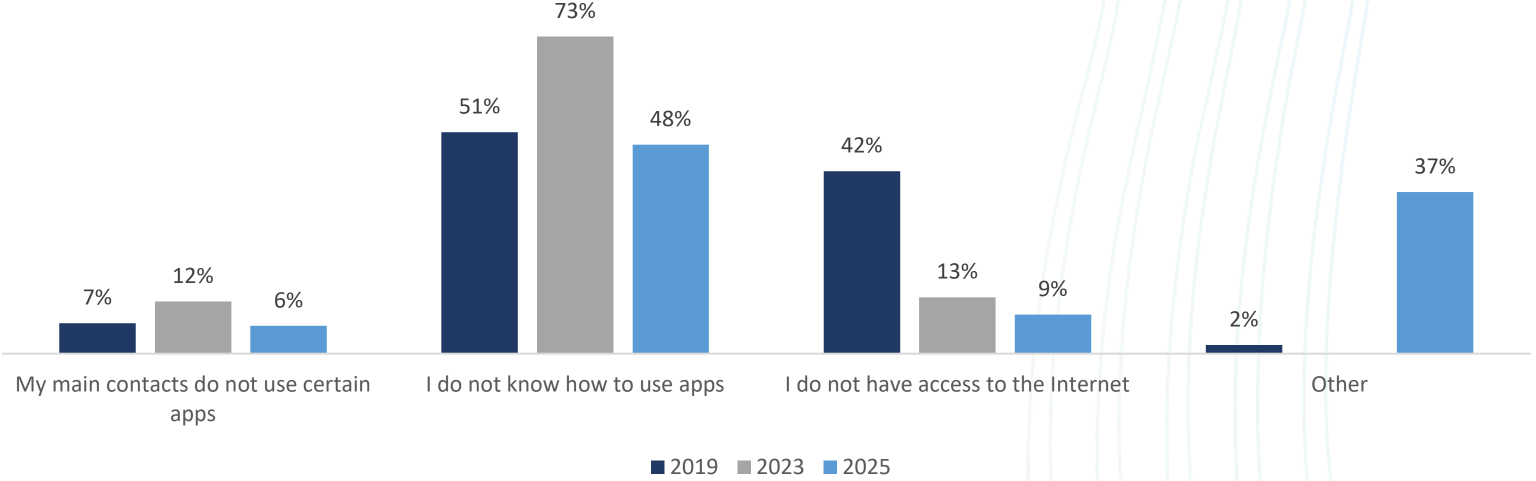


Termination of services and alternatives (5 of 5)

Reasons for not using OTT services

Number of respondents indicating that calls made using third party apps are never good substitutes to calls made via fixed telephony subscription – 32

** Respondents could provide multiple responses.*



- Among those who selected “Other”, the majority stated they prefer calling directly from their mobile number.

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