MCA Survey Findings for Mobile Telephony

Consumer Perceptions

August 2025

MCA Reference: MCA/S/25-5702

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Methodology

Fieldwork and Sampling

Survey fieldwork carried out by PKF Malta between February and March 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

Key Insights

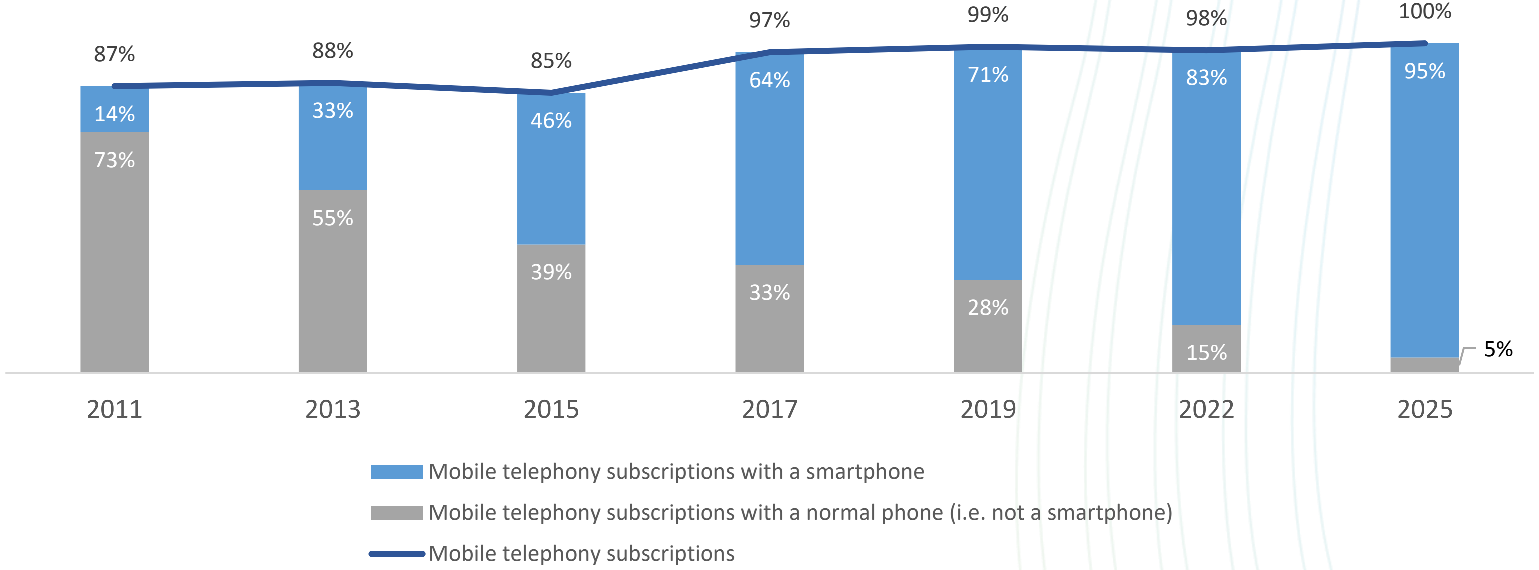
- Mobile access virtually universal and **95% of respondents having a smartphone**, up from 83% in 2022.
- The number of **respondents subscribed to more than one mobile service increased** from 8% in 2022 to 17% in 2025.
- 85% of respondents use mobile data services (70% in 2022). Most common activities **include social media, browsing and email.**
- 17% of survey respondents **switched their main mobile service provider**, doubling from 8% reported in the 2022 survey.
- **Fewer users consider mobile broadband as a good substitute to fixed broadband**, down from 51% in 2022 to 39% in 2025.
- **Chat remains the most popular OTT service used over mobile broadband**, followed by voice services and content services.
- **19% of surveyed mobile users had adopted eSIM-based services** in the six months preceding the study.

Access and Usage

Take-up of the service

Availability of mobile telephony in Maltese households

Number of respondents with a mobile subscription – 400
i.e. 100% of the total number of respondents

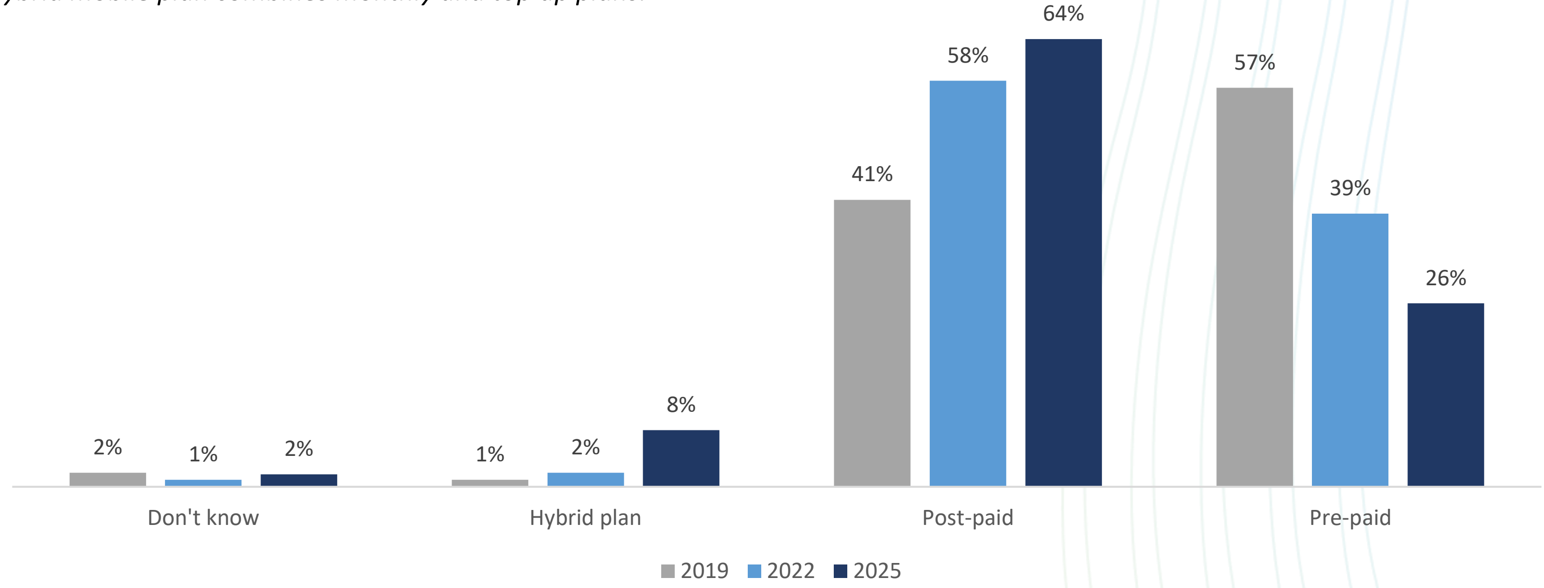


Take-up of the service – by type of plan

Profile of subscriptions - by type of plan

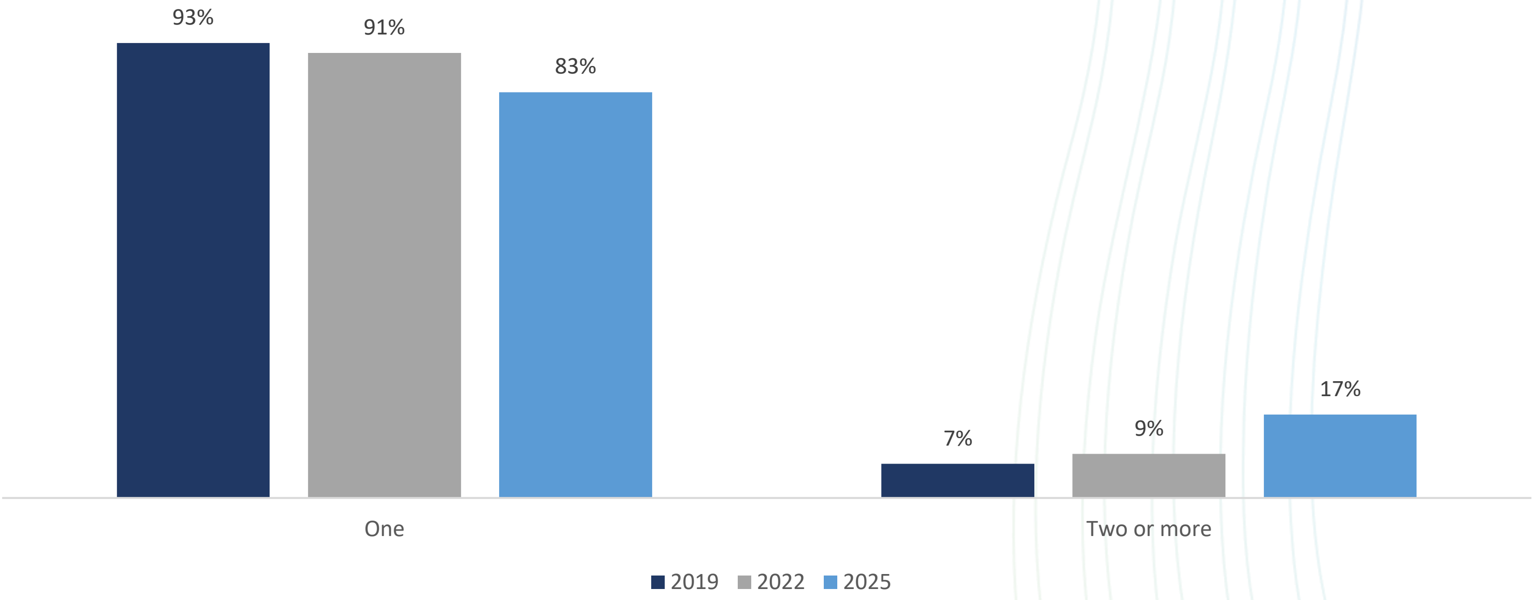
Number of respondents with a mobile subscription – 400

** A hybrid mobile plan combines monthly and top-up plans.*



Respondents with multiple subscriptions

Number of respondents with multiple mobile subscriptions – 68

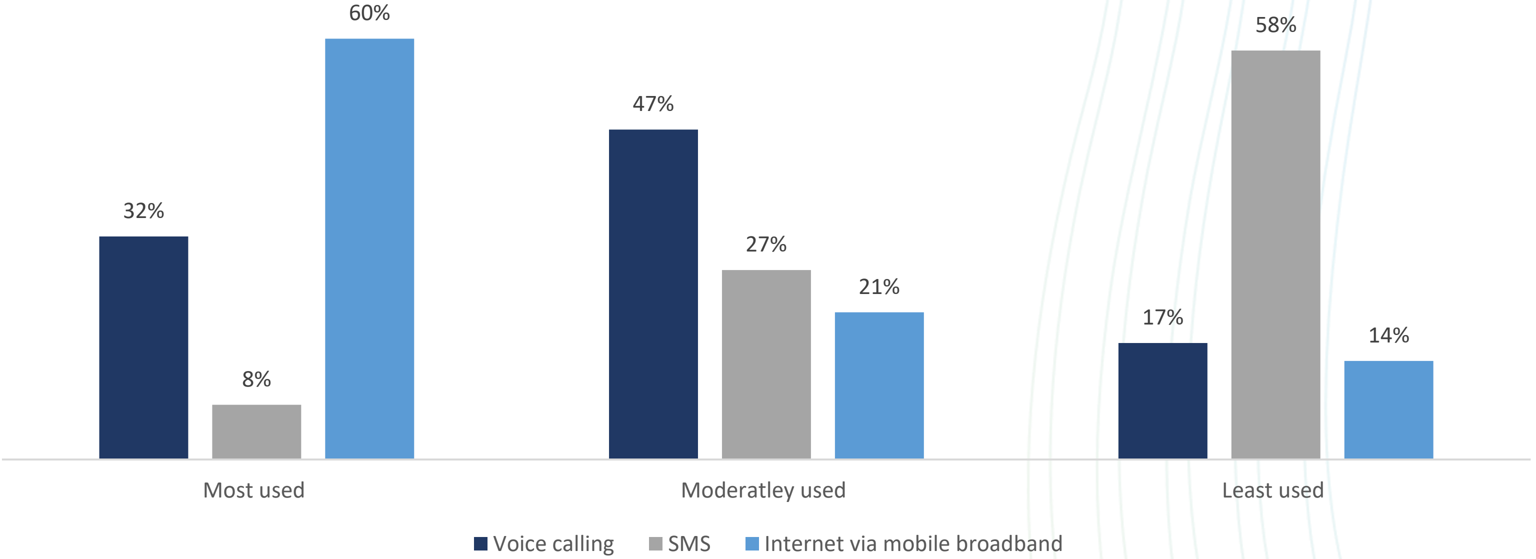


Frequency of use – by service

Frequency of use by type of service

Number of respondents with a mobile subscription – 400

** Services ranked according to respondents' frequency of use.*

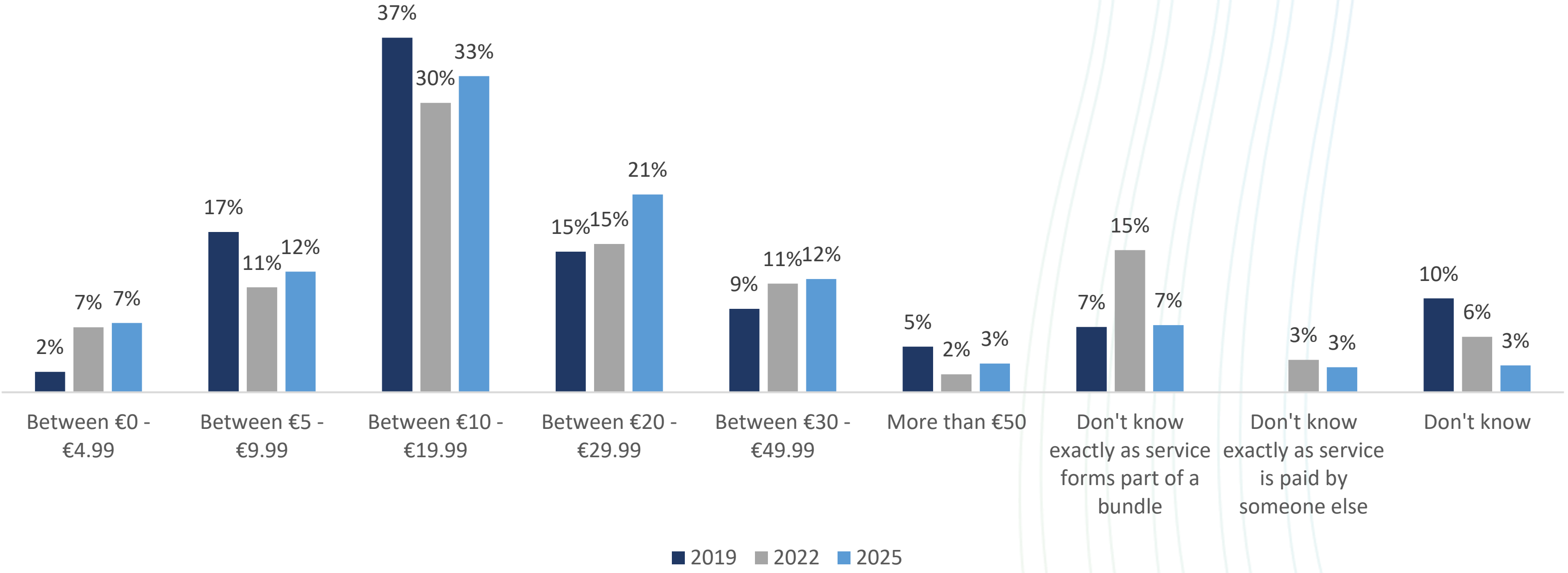


Expenditure

Average monthly expenditure on main subscription (1 of 3)

Average monthly expenditure - overall

Number of respondents with a mobile subscription – 400

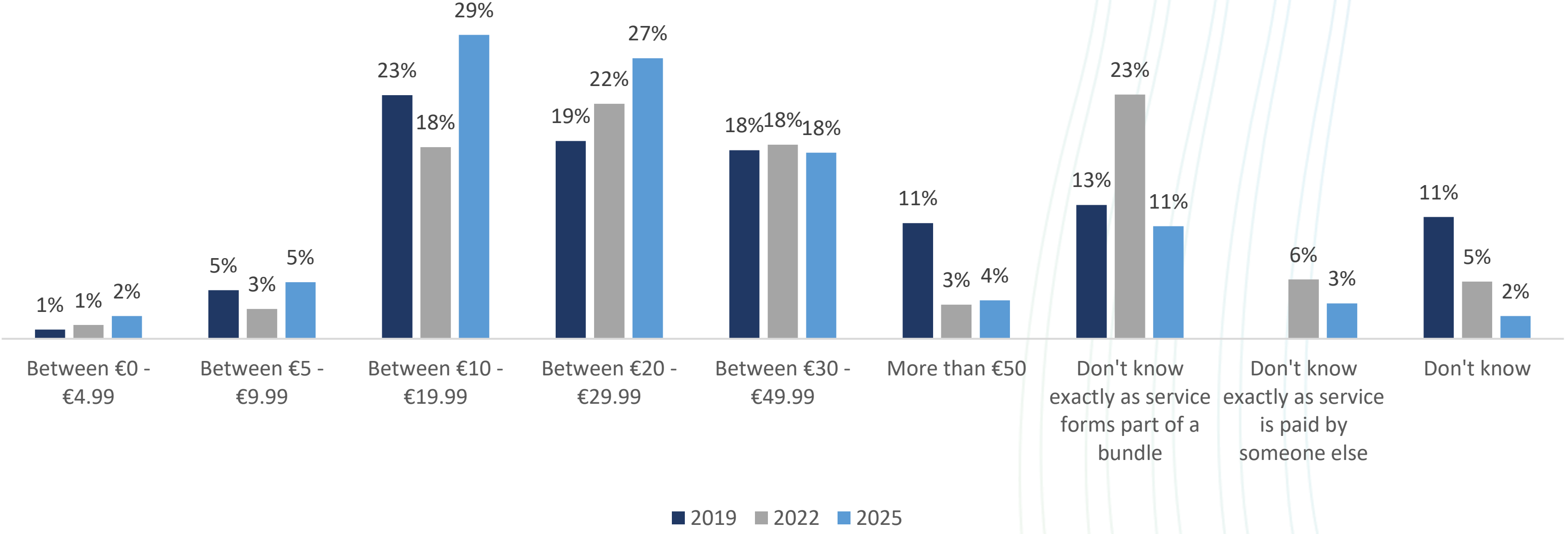


Average monthly expenditure on main subscription (2 of 3)

Average monthly expenditure – users on post-paid plans

Number of respondents with a post-paid subscription - 255

** In 2019, the option "Don't know exactly because the service is paid by someone else" was not included in the survey.*



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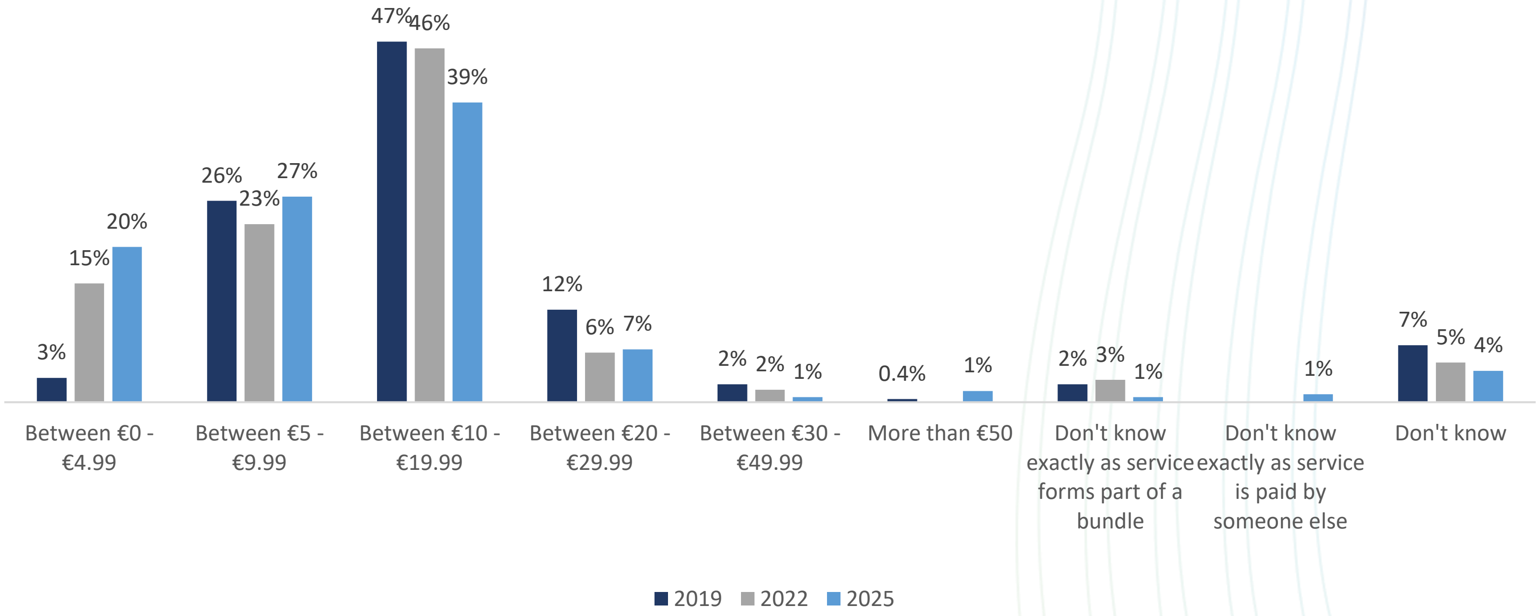
Average monthly expenditure on main subscription (3 of 3)

Average monthly expenditure – users on pre-paid plans

Number of respondents with a pre-paid subscription - 104

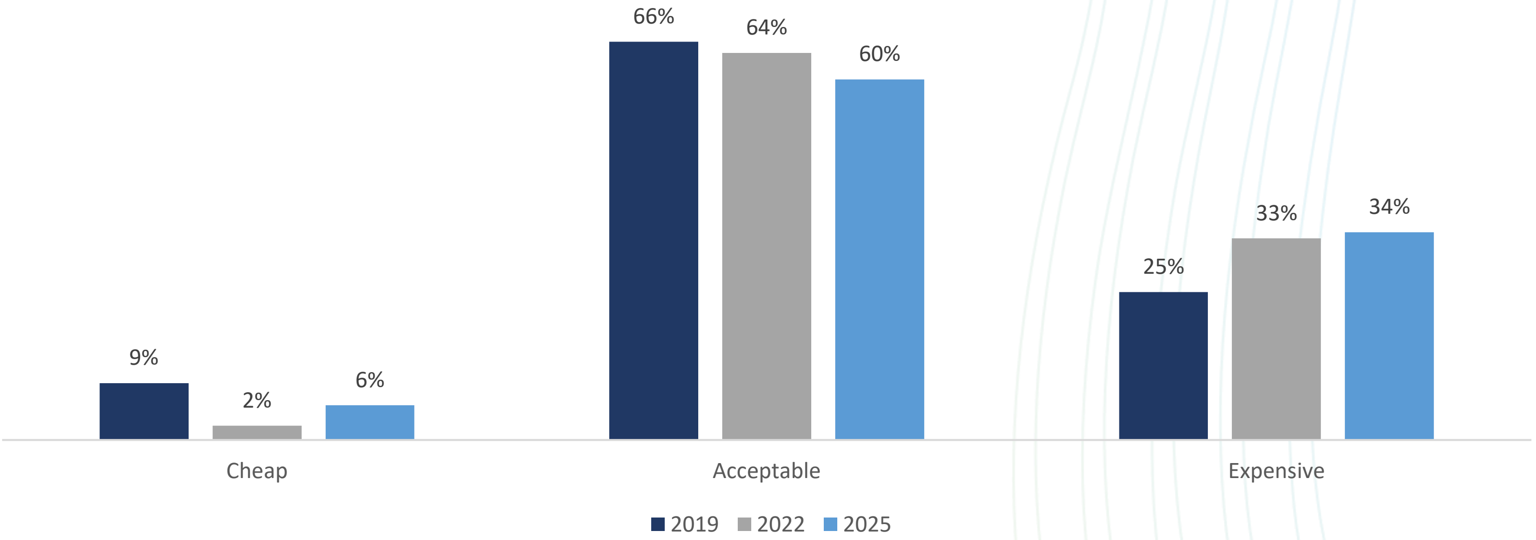


Perceived cost for mobile call services (1 of 3)

Perception on the cost of mobile calls - overall

Number of respondents with a mobile subscription – 400

** In the 2025 survey, 72 respondents (22% of the weighted sample) selected "Don't know". These were excluded from the below analysis.*

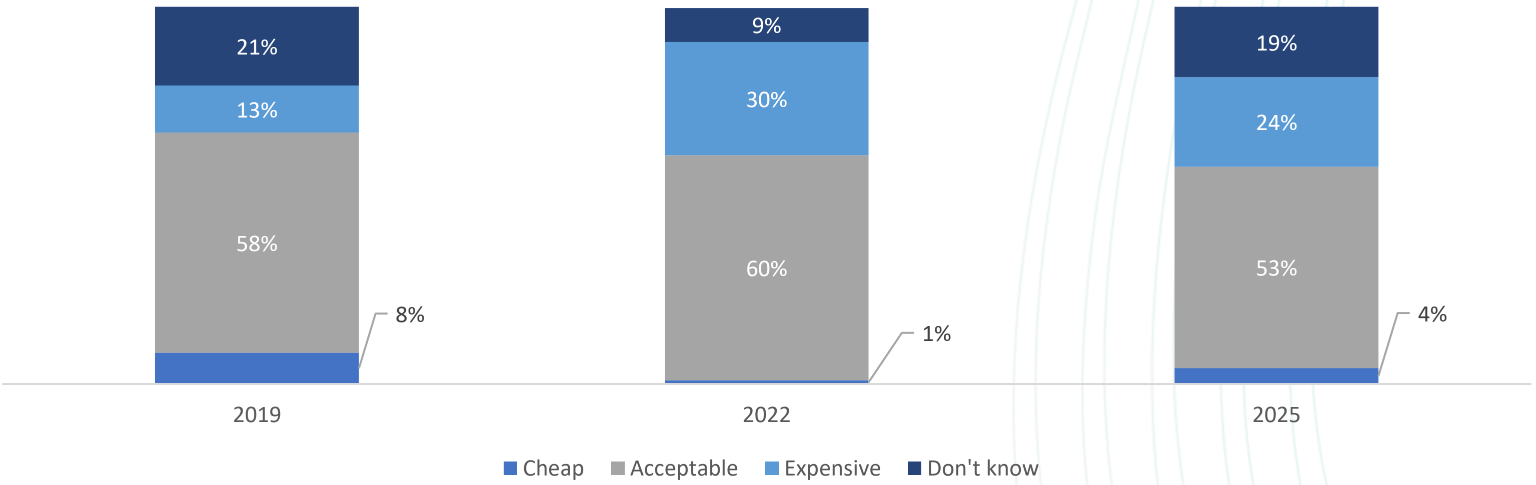


Perceived cost for mobile call services (2 of 3)

Perception on the cost of mobile calls – users on post-paid plans

Number of respondents with a post-paid subscription – 255

** In 2019, this question was asked only to those survey respondents who were knowledgeable of the price of a one-minute mobile call. In the 2022 and 2025 surveys, this question was asked to all survey respondents.*



Perceived cost for mobile call services (3 of 3)

Perception on the cost of mobile calls – users on pre-paid plans

Number of respondents with a pre-paid subscription – 104

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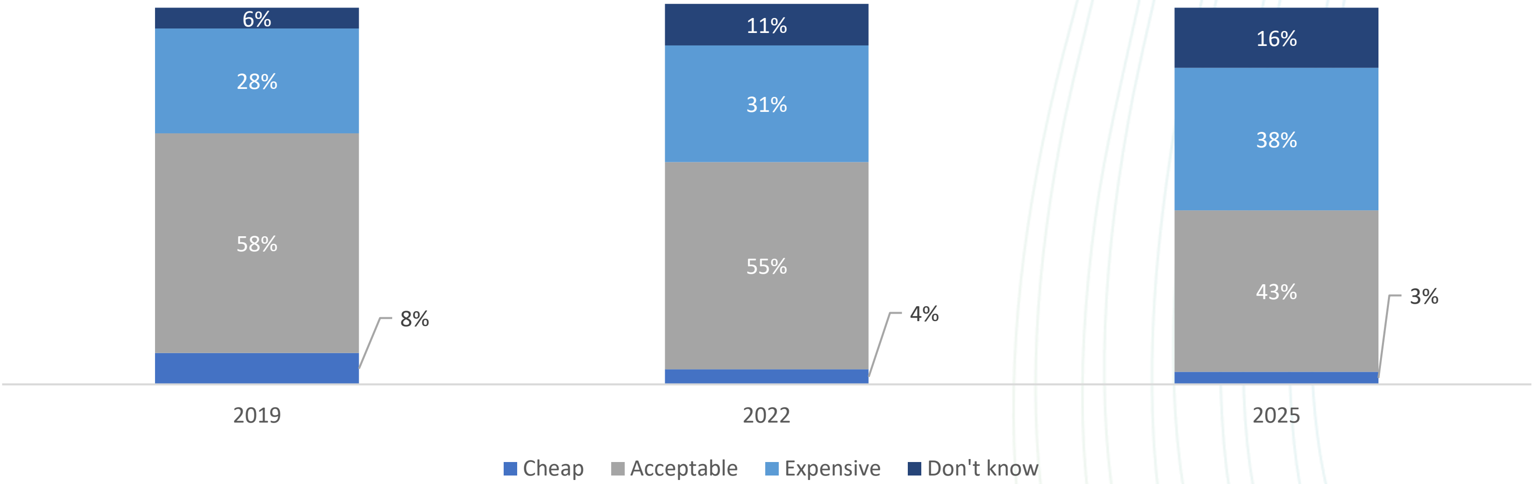
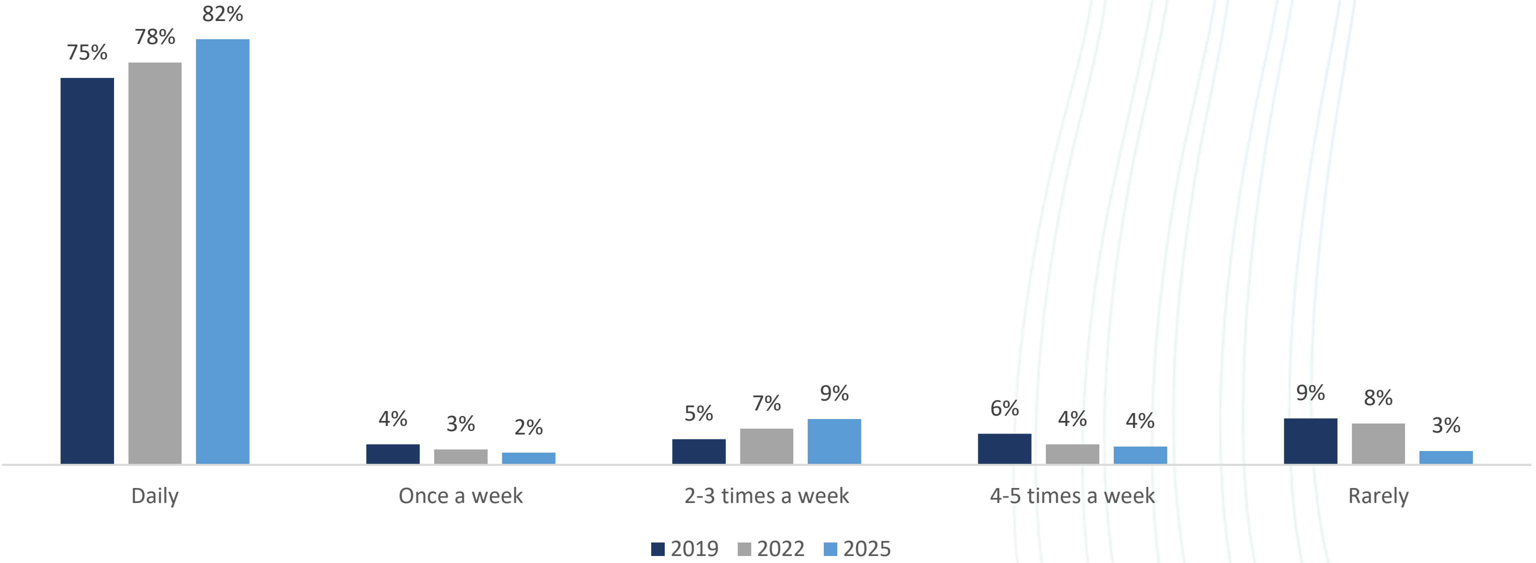


Mobile Data

Usage of mobile data services (1 of 4)

Frequency of usage of mobile data services

Number of respondents making use of mobile broadband – 339
i.e. 85% of the number of respondents having a mobile subscription

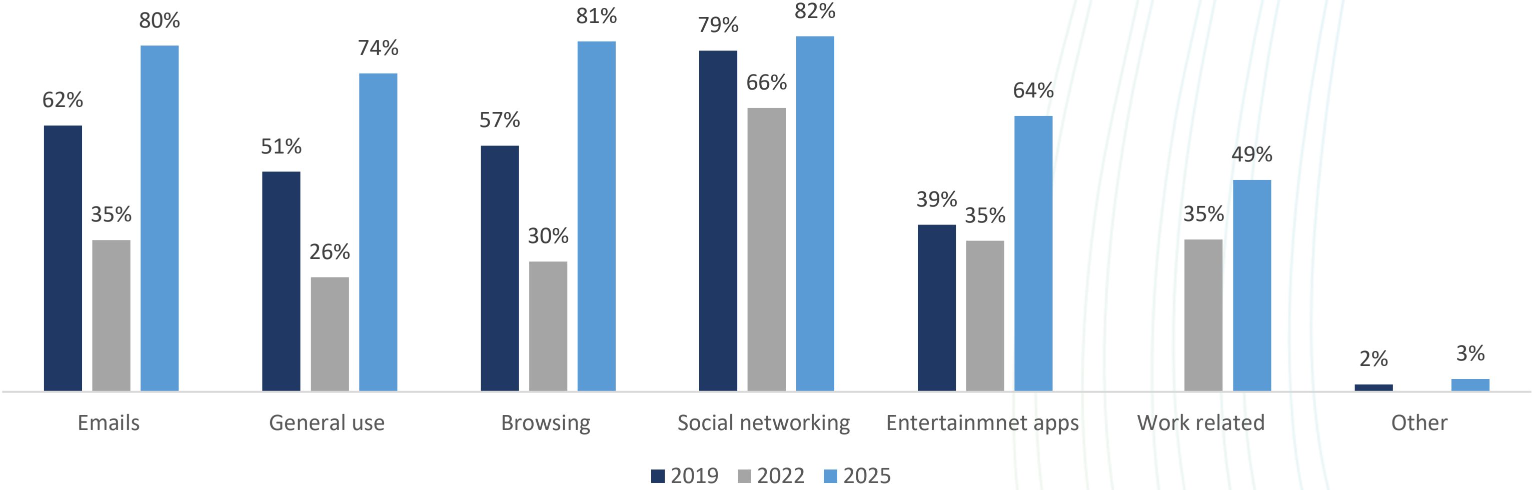


Usage of mobile data services (2 of 4)

Reasons for using mobile data services

Number of respondents making use of mobile broadband – 339

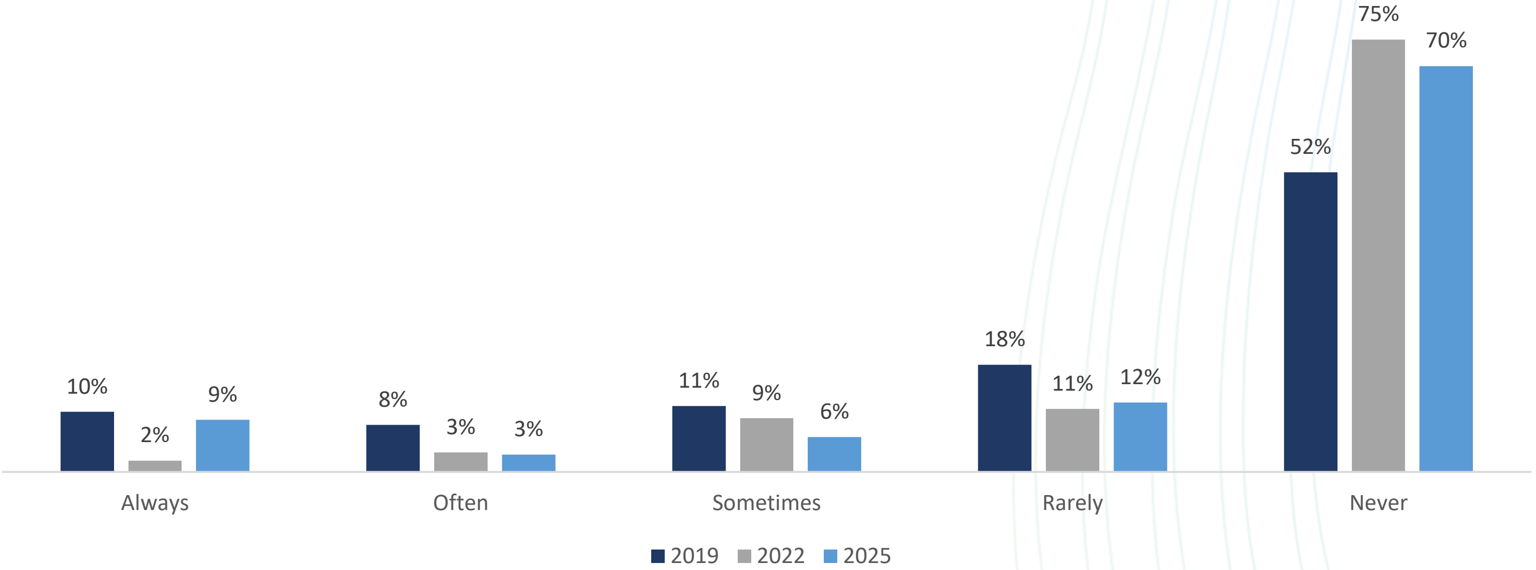
** In the 2022 survey, respondents were asked to rank the services by preference, from one to seven, whereas in 2019 and in 2025, respondents could select multiple responses. For comparative purposes, the 2022 data was adjusted by combining all ranked choices (ranks 1–7) to approximate multiple selections. As a result, figures may differ from previously published reports.*



Usage of mobile data services (3 of 4)

Usage beyond data allowance

Number of respondents making use of mobile broadband – 339
i.e. 85% of the number of respondents having a mobile subscription

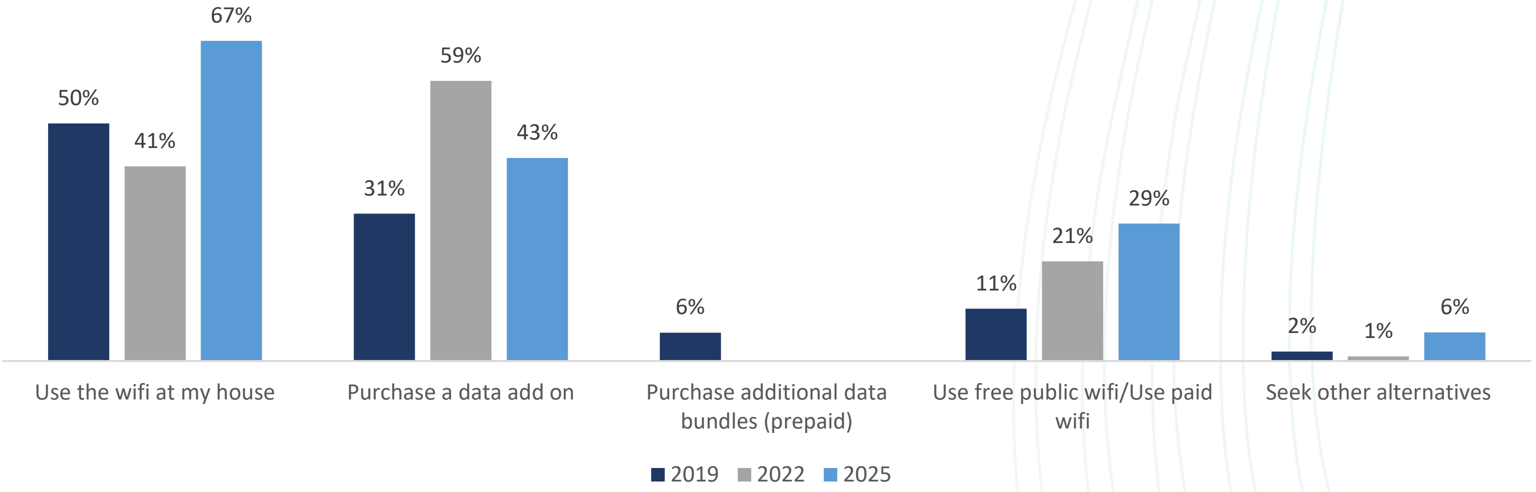


Usage of mobile data services (4 of 4)

Actions undertaken once data allowance is fully consumed

Number of respondents using more data than that available as an allowance or data add-on – 103
i.e. 26% of the number of respondents making use of mobile broadband

** Respondents could select multiple reasons. In the 2025 survey, "Purchase additional data bundles (pre-paid)" was not included as an option.*

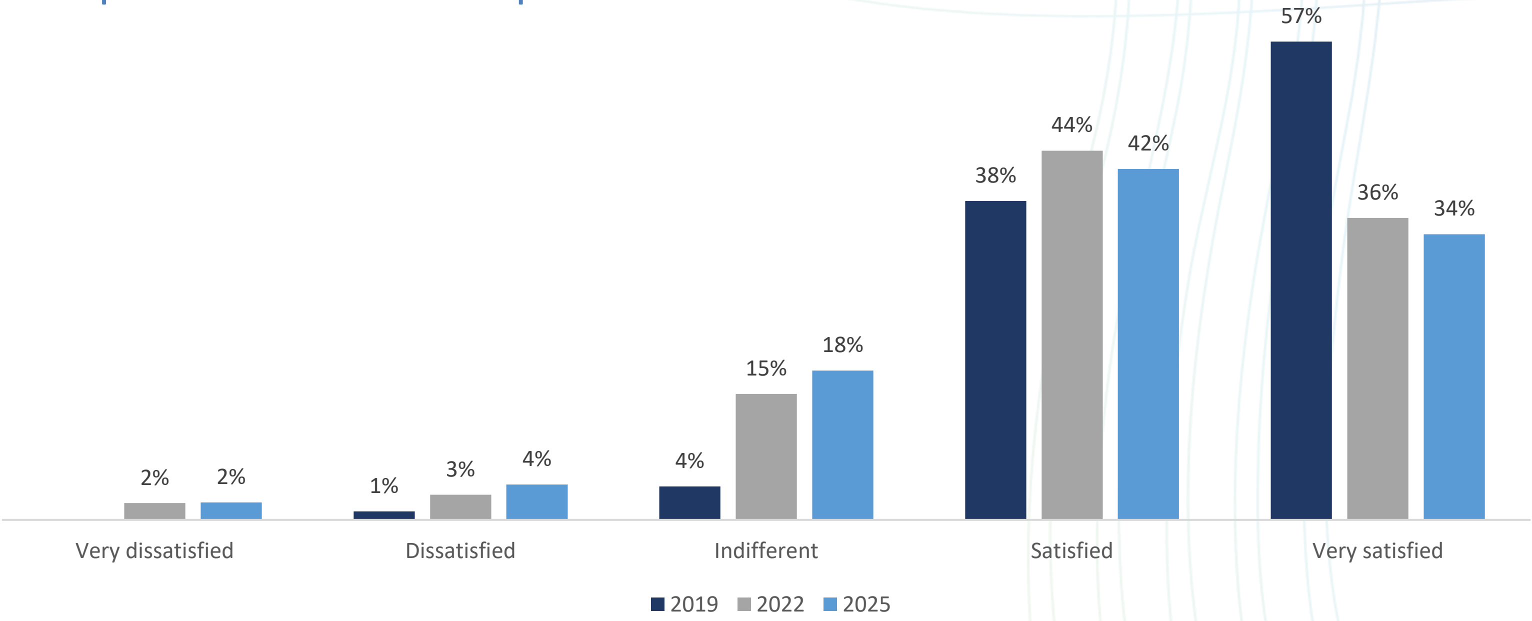


Quality of Service and Switching

Quality of service (1 of 3)

Perceived satisfaction - overall

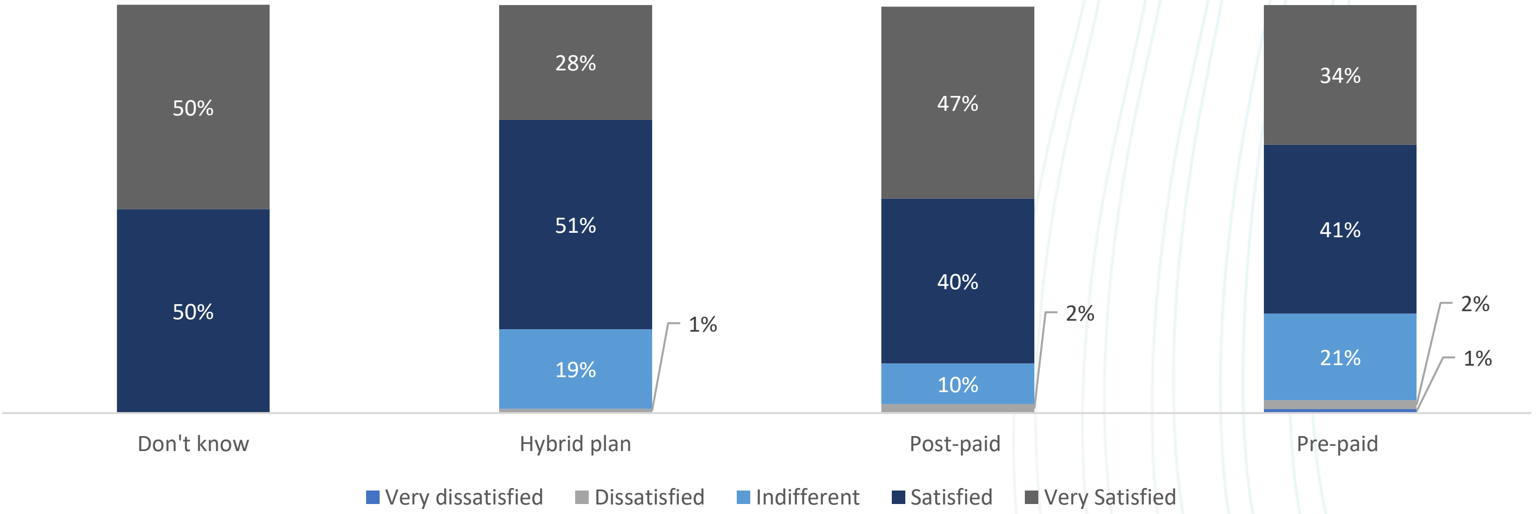
Number of respondents with a mobile subscription – 400



Quality of service (2 of 3)

Perceived satisfaction – overall by type of service

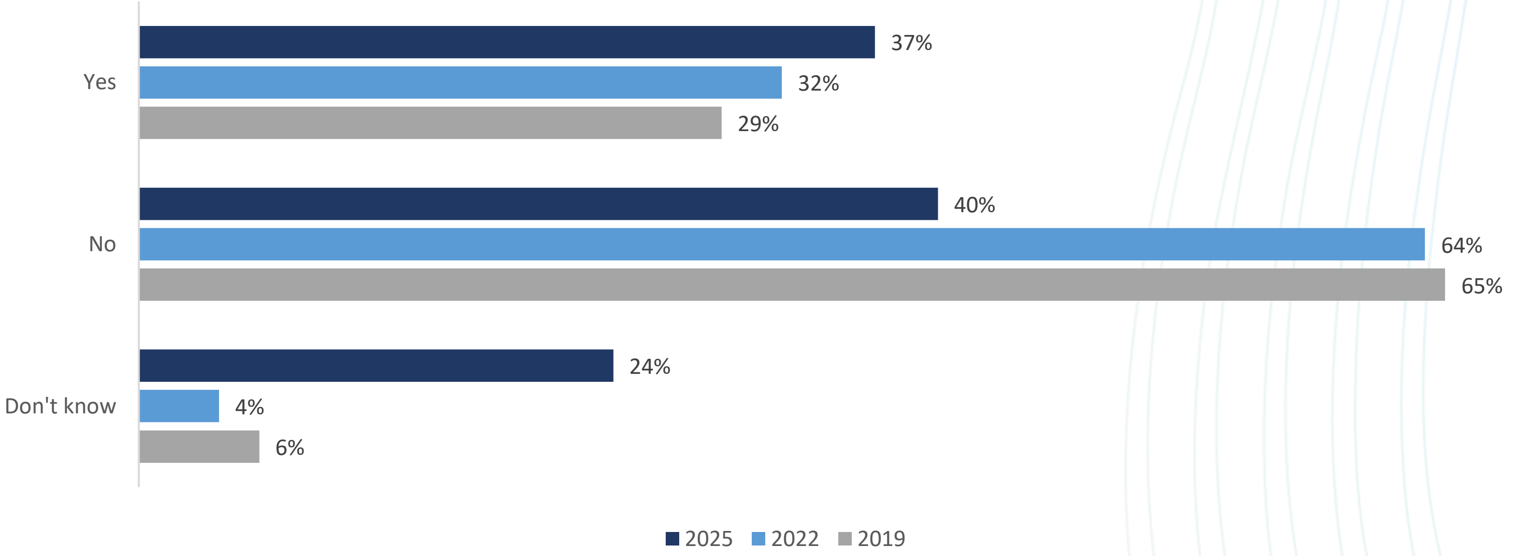
Number of respondents with a mobile subscription – 400



Quality of service (3 of 3)

Switching considerations – respondents not satisfied or indifferent to service quality

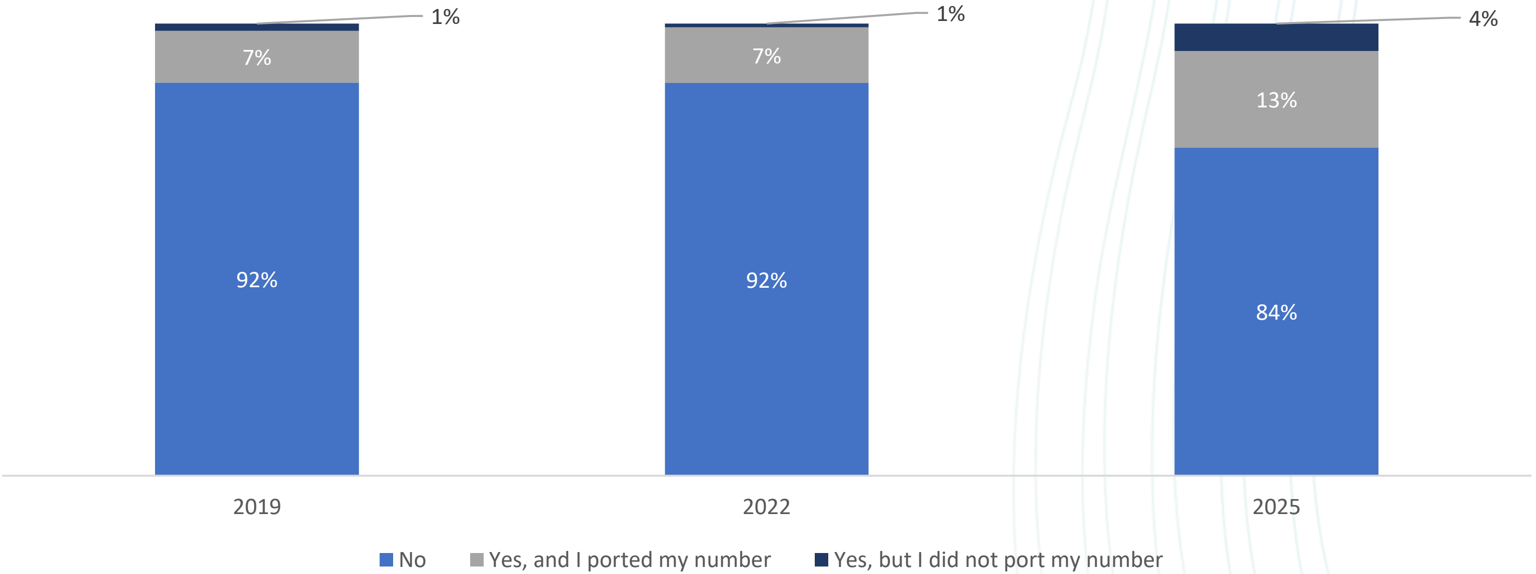
Number of respondents perceiving their overall mobile service to be unsatisfactory/indifferent – 96
i.e. 24% of the number of respondents having a mobile subscription



Switching (1 of 3)

Percentage of respondents switching from one mobile service provider to another within the previous two years

Number of respondents with a mobile subscription – 400

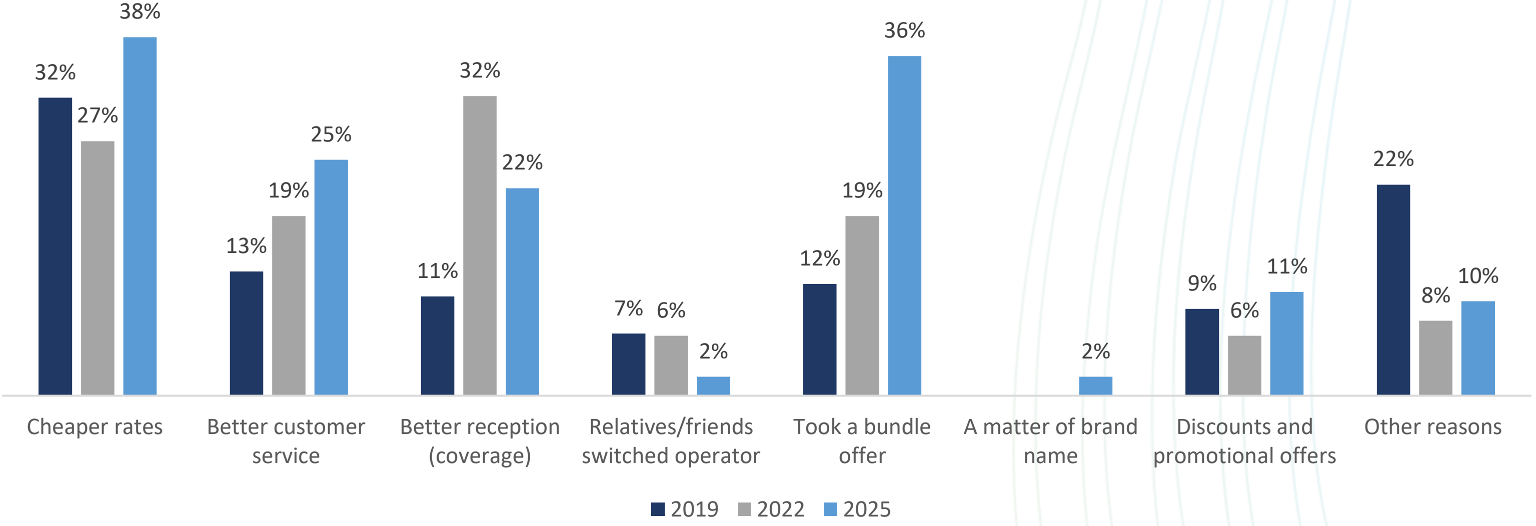


Switching (2 of 3)

Reasons for switching operator

Number of respondents who switched their operator within the last two years – 66
i.e. 17% of the number of respondents having a mobile subscription

** Respondents provided multiple responses.*

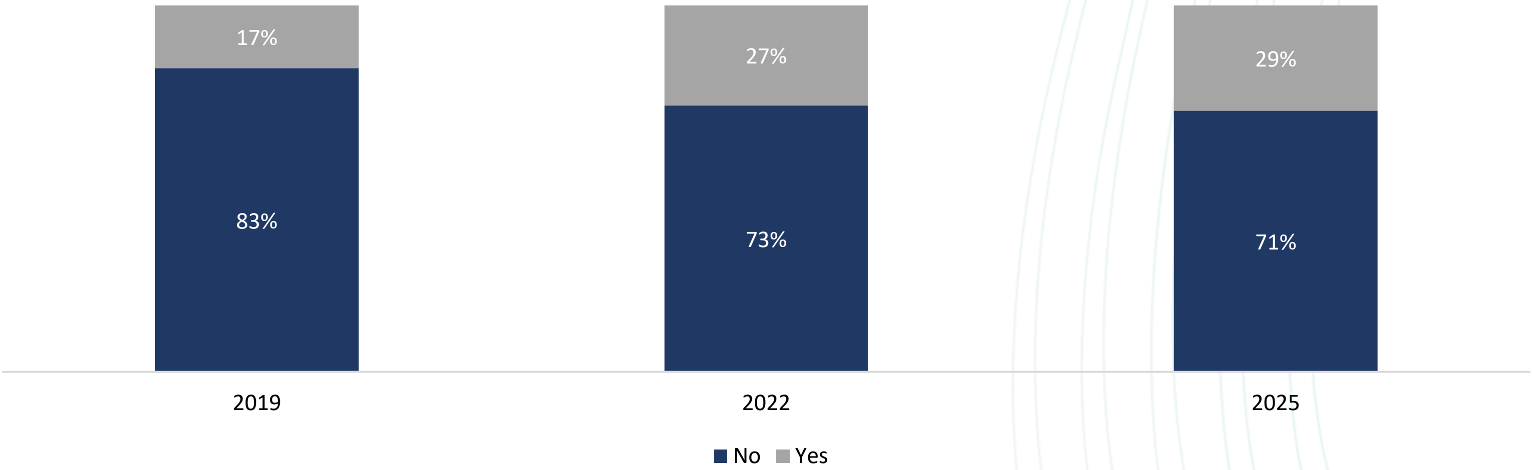


Switching (3 of 3)

Percentage of respondents who changed their mobile plan in the last two years

Number of respondents with a mobile subscription – 400

** The figures below do not include those respondents who stated that they don't know whether they changes their mobile plan in the last 2 years.*

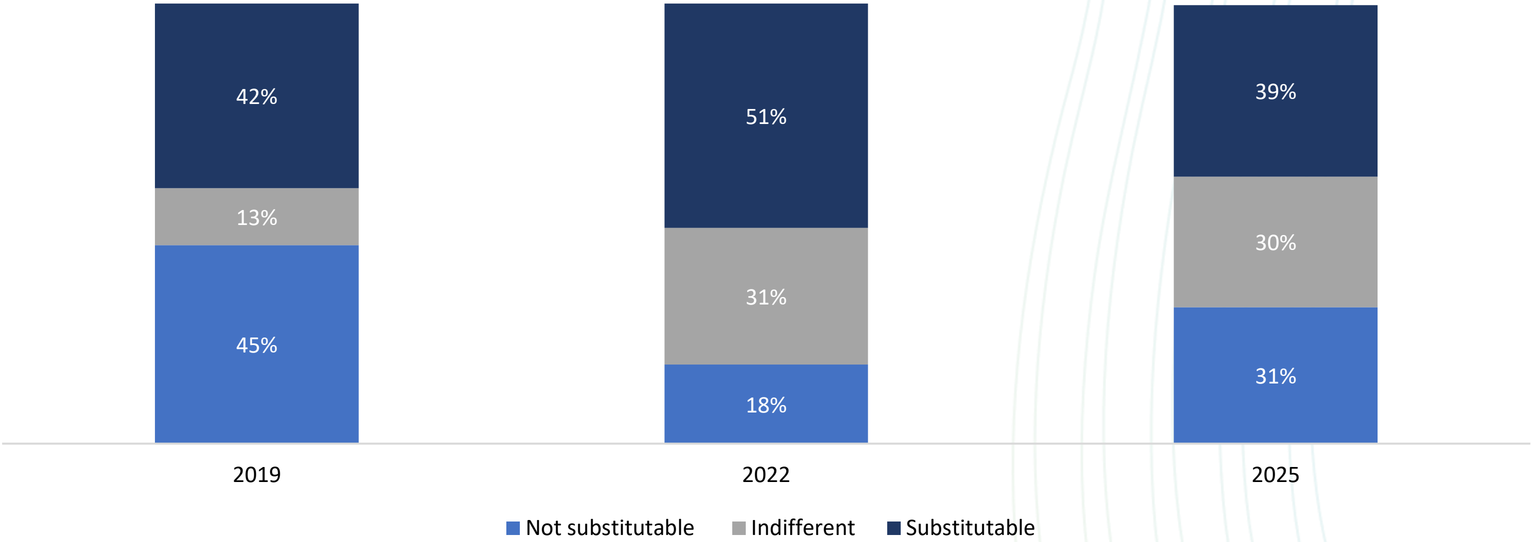


Substitutability of broadband

Percentage of respondents who consider mobile internet as being substitutable for fixed internet

Number of respondents making use of mobile broadband – 381

i.e. 95% of the number of respondents having a mobile subscription

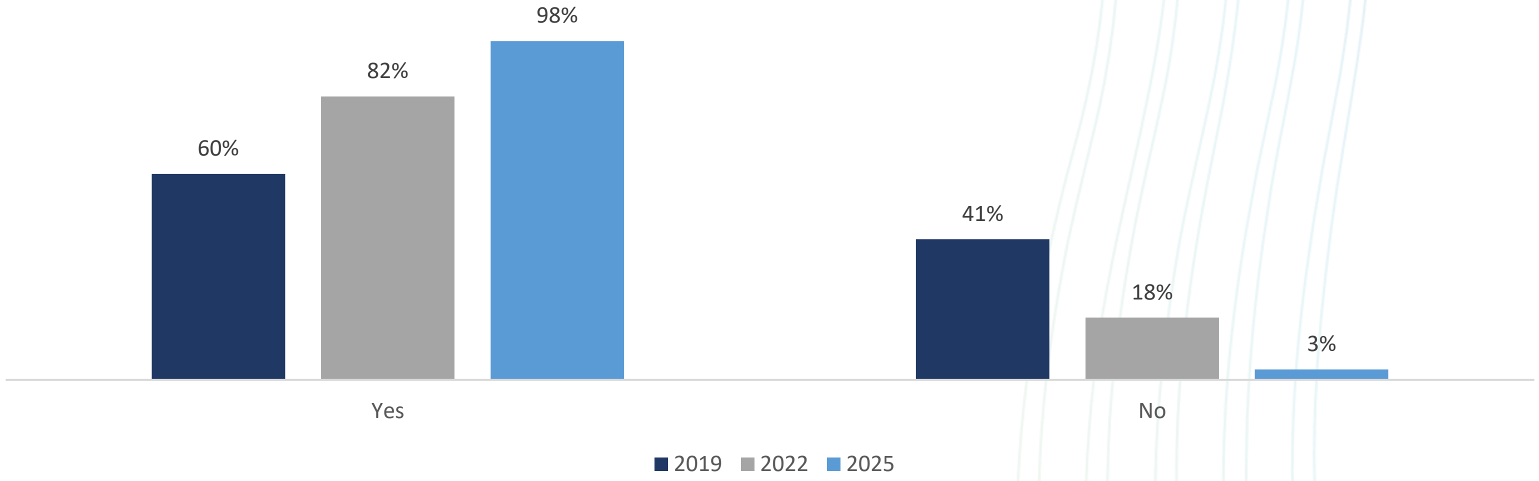


OTT Usage Over Mobile Internet

OTTs over mobile internet (1 of 5)

Usage of OTT services over mobile internet - overall

Number of respondents with a smartphone – 381



- 82% of respondents make use of OTT services over mobile broadband (up by 12 percentage points over the previous study).
- 66% of those respondents who do not make use of OTTs over mobile broadband are over 65 years of age.

OTTs over mobile internet (2 of 5)

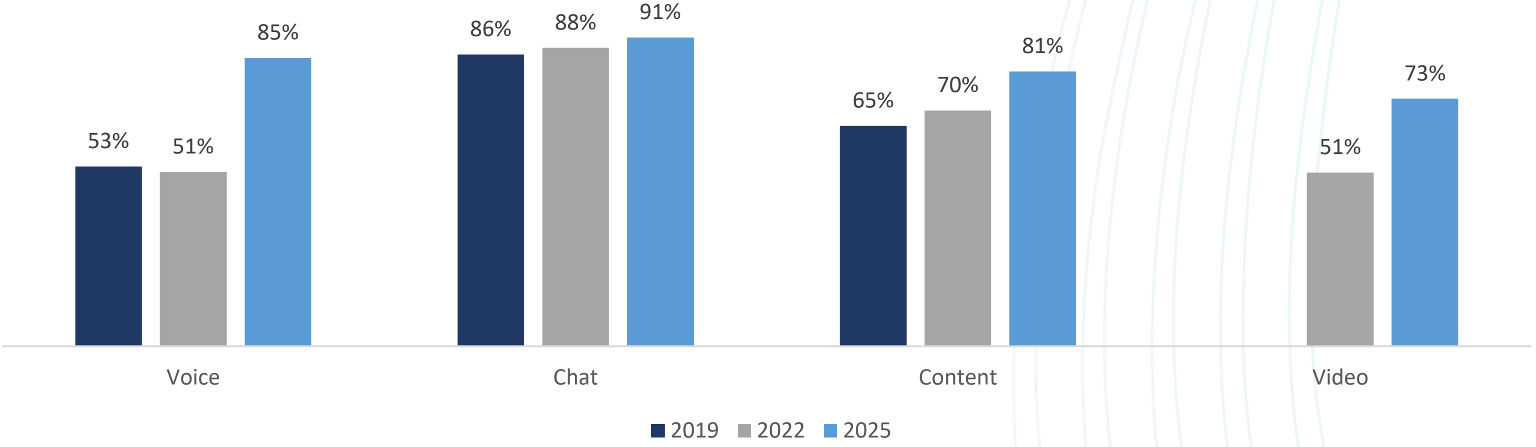
Usage of OTT services over mobile internet – by type of service

Number of respondents making use of OTTs over mobile broadband – 327

i.e. 82% of the number of respondents having a mobile subscription

** Respondents could provide multiple options*

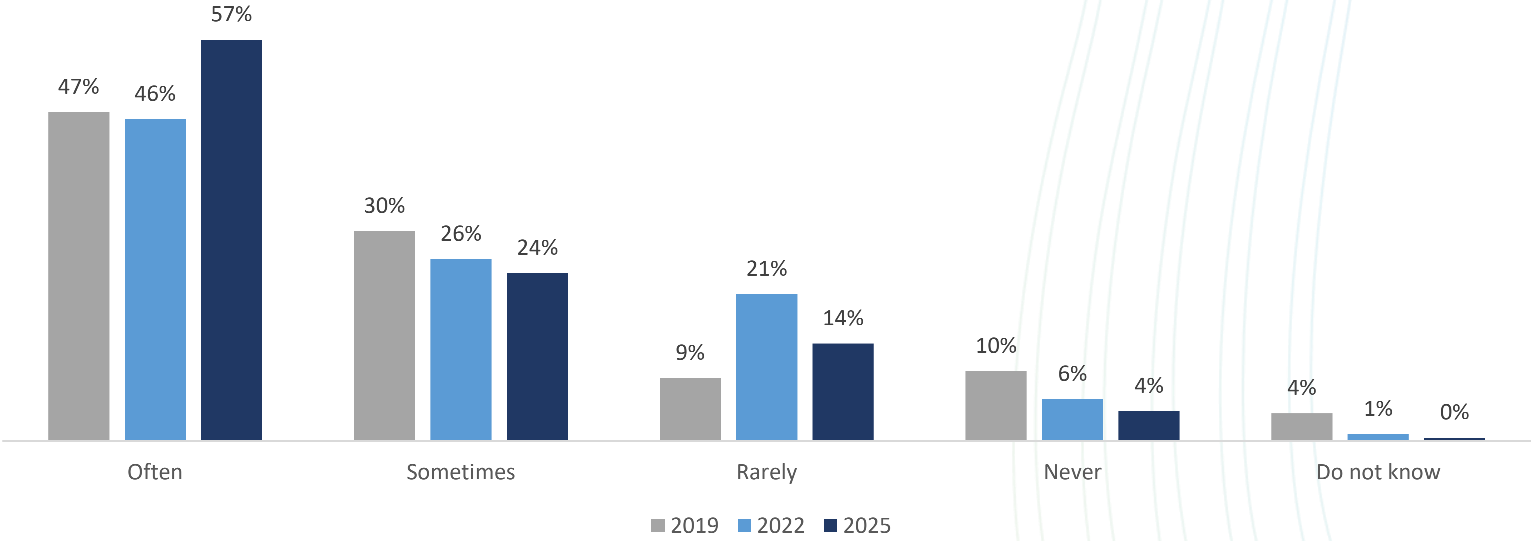
** Video was not one of the options in 2019*



OTTs over mobile internet (3 of 5)

Substitutability of OTT calls to mobile calls

Number of respondents making use of voice call OTTs over mobile internet – 279
i.e. 70% of the number of respondents making use of OTTs over mobile broadband

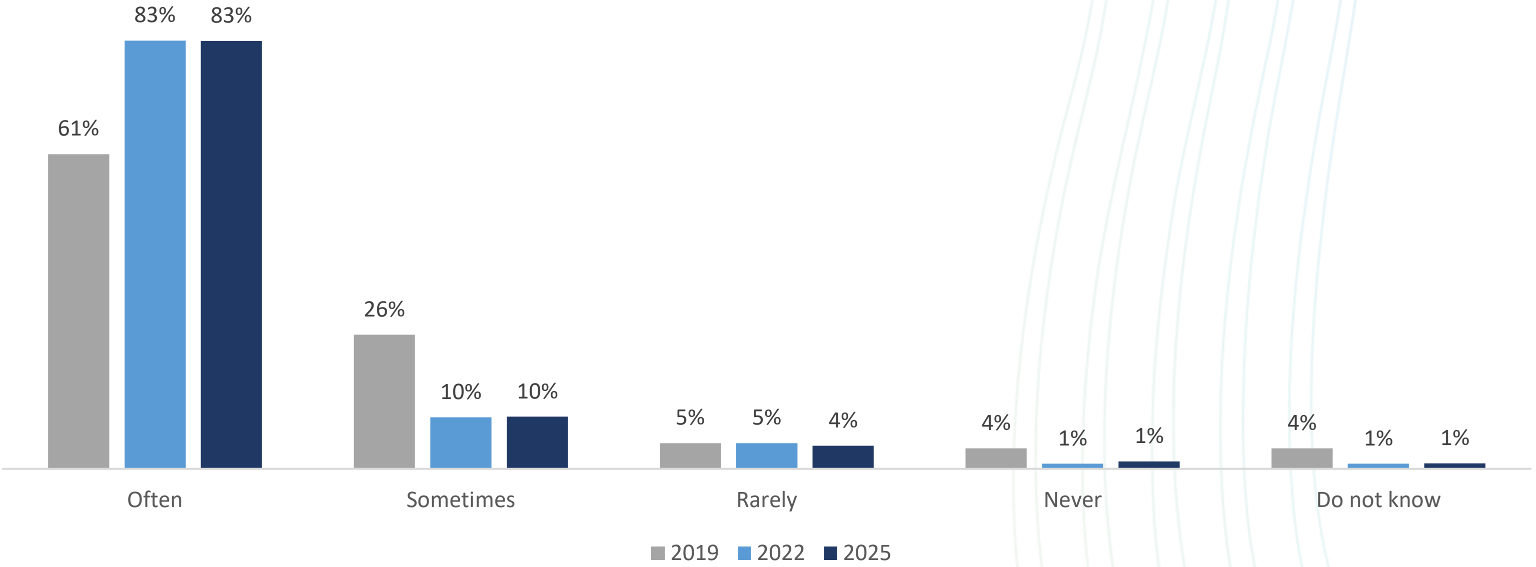


OTTs over mobile internet (4 of 5)

Substitutability of OTT chat messages to mobile SMS

Number of respondents making use of chat OTTs over mobile broadband – 304

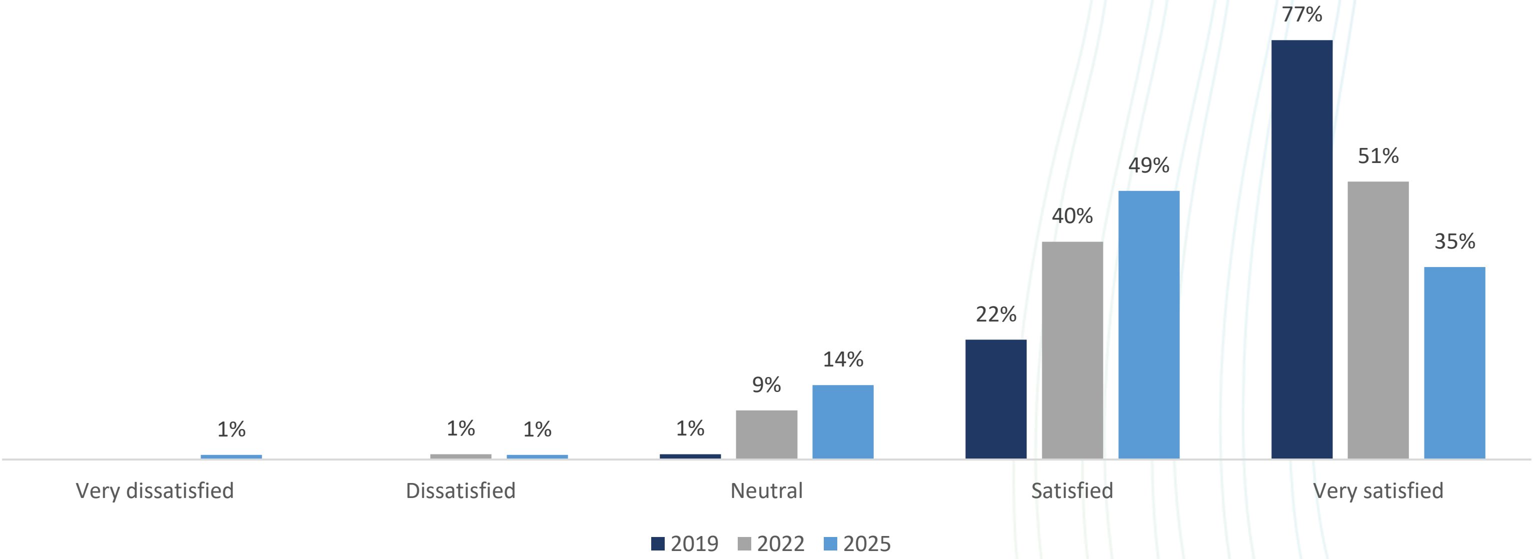
i.e. 76% of the number of respondents making use of OTTs over mobile broadband



OTTs over mobile internet (5 of 5)

Satisfaction levels with the use of OTTs

Number of respondents making use of OTTs over mobile internet – 329
i.e. 82% of the number of respondents having a mobile subscription



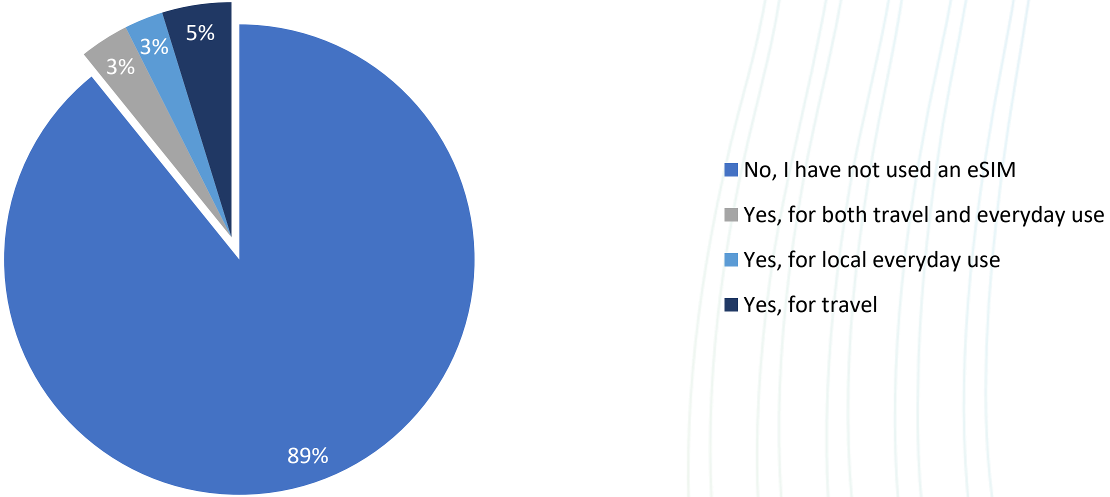
eSIM

Adoption of eSIM Technology

Usage of eSIM services in the past 6 months - overall

Number of respondents with a mobile subscription – 400

** This is the first time that such topic is being assessed.*

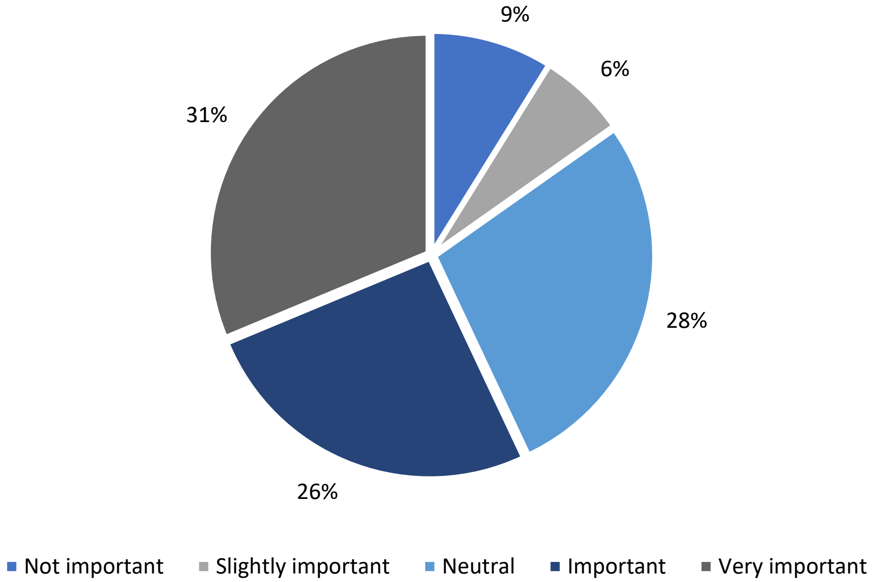


Sustainable measures for mobile service use

Sustainable measures for mobile service use

The significance of eco-friendly initiatives by service providers from the perspective of their customers.

Number of respondents with a mobile subscription – 400

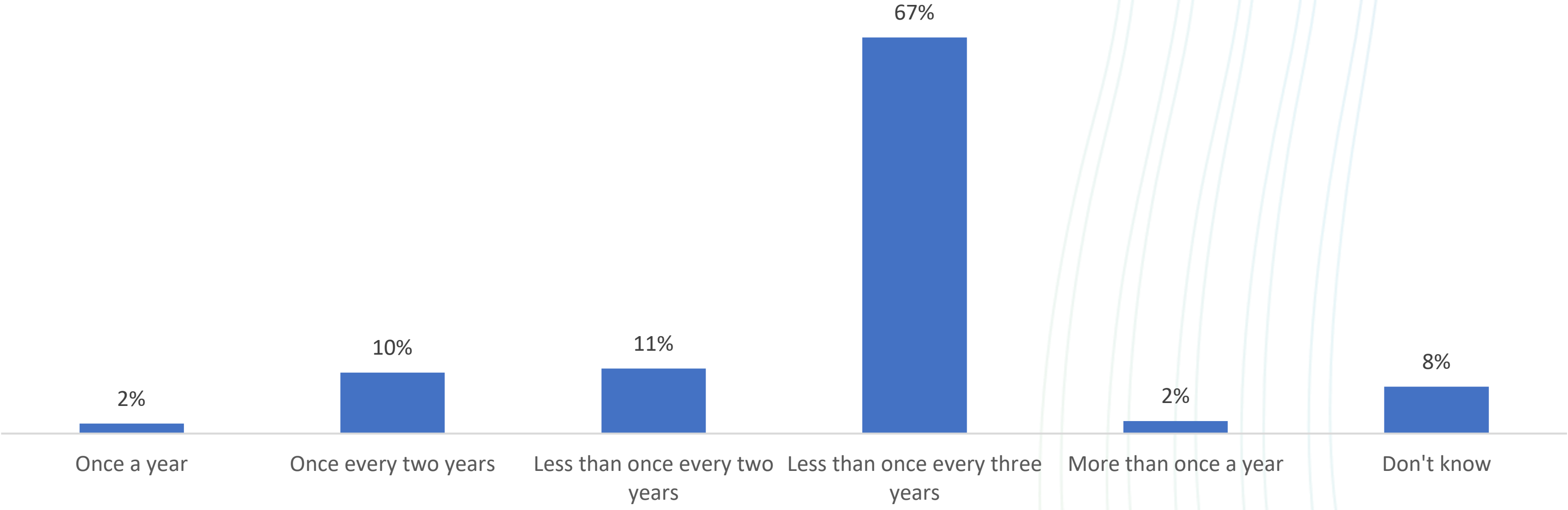


- 57% of respondents say that it is important for them to know that their mobile service provider has environmentally friendly measures integrated in its business operation.

Mobile phone replacement (1 of 2)

Frequency of upgrading one's mobile phone

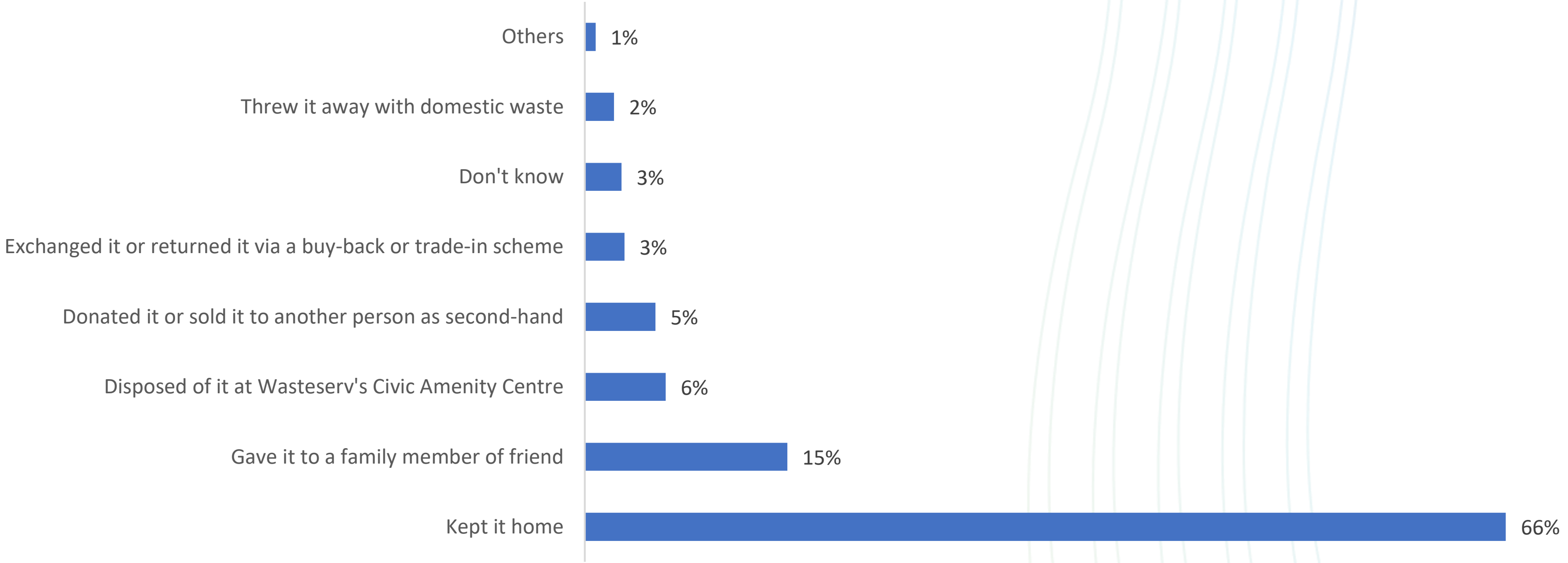
Number of respondents with a mobile subscription – 400



Mobile phone replacement (2 of 2)

End-point for unused mobile handsets

Number of respondents with a mobile subscription – 400



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