



Perceptions of expats on mobile telephony usage in Malta

Based on survey findings

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- Survey with a focus on perceptions of expats on Malta's mobile telephony services.
- First time that such a survey is being carried out.
- National Statistics Office (NSO) carried out fieldwork on behalf of MCA in Q4 2019.
- A total of 1,413 persons were contacted for this survey where 503 participated.
- 95.3% of all respondents say they have a mobile subscription with a local service provider.

Fieldwork

- Stratified random sampling;
- Computer Assisted Telephone Interview (CATI);
- Foreign citizens living in private households.

Eligibility

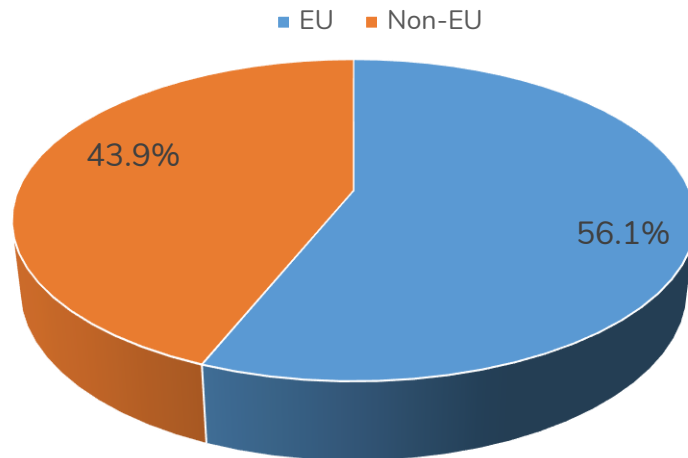
- Age range: 18+;
- Expat community - EU and non-EU citizenship.
- Survey was carried out prior to the UK formally exiting the EU by end January 2020. Hence, UK respondents classify under EU in this research study.

Response

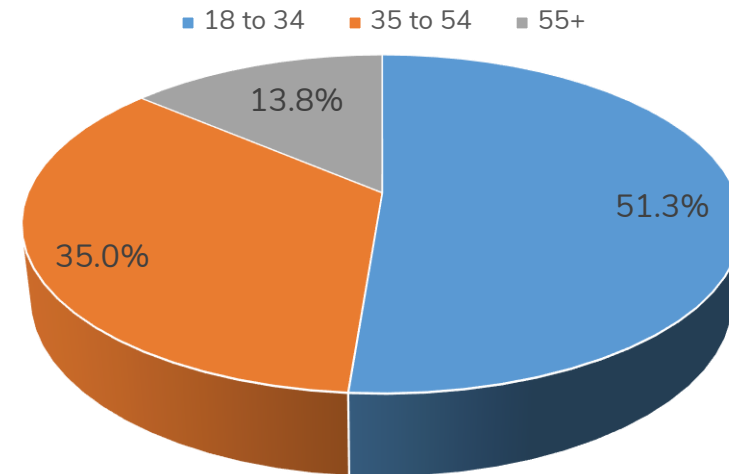
- A total of 1,413 persons were contacted for this survey where 503 participated;
- Margin of error 4% at 95% confidence interval.

Malta's expat community (1 of 2)

Share of respondents by citizenship



Share of respondents by age



A total of 73,371 persons were eligible to participate in survey, with around half falling within the 18 to 34 age bracket.

66.7% of all EU expats are employed, compared to 64.7% in the case of non-EU expats.

41.4% of all EU expats are from the UK; 19.0% are from Italy.

26.2% of all non-EU expats are from other European countries; 17.9% are from Asia; and 17.5% are from Africa.

Malta's expat community (2 of 2)

Distribution of the expat population in Malta
by sex and age group

Age Group	Sex					
	Male		Female		Total	
	No.	%	No.	%	No.	%
18-34	22,084	51.4	15,521	51.1	37,605	51.3
35-54	15,391	35.8	10,279	33.8	25,670	35.0
55+	5,515	12.8	4,581	15.1	10,096	13.8
Total	42,990	100.0	30,381	100.0	73,371	100.0

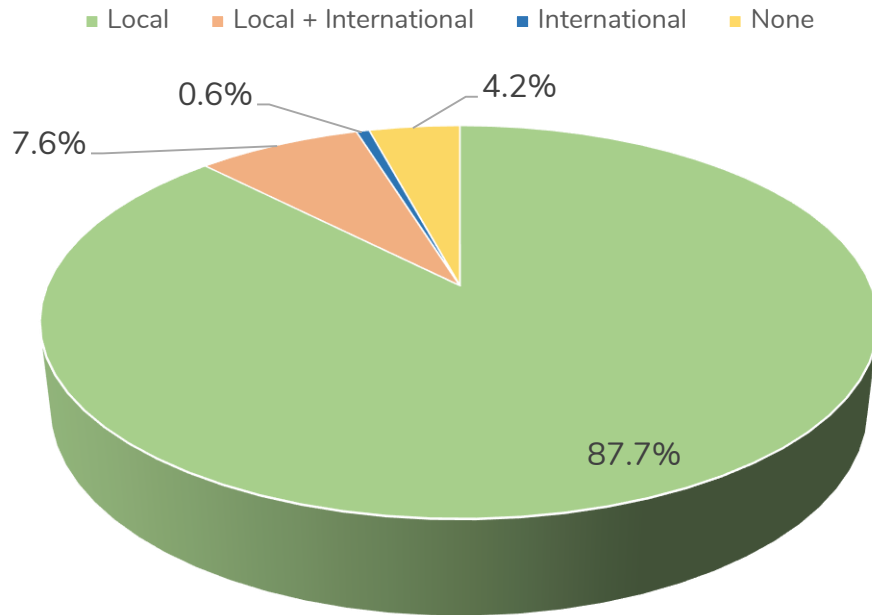
Distribution of population by sex and citizenship

Citizenship	Sex					
	Male		Female		Total	
	No.	%	No.	%	No.	%
EU	23,927	55.7	17,262	56.8	41,189	56.1
Non-EU	19,063	44.3	13,119	43.2	32,182	43.9
Total	42,990	100.0	30,381	100.0	73,371	100.0

The subscription profile of Malta's expats

95.3% of all survey respondents (i.e. 479) have a subscription with a local mobile telephony service provider.

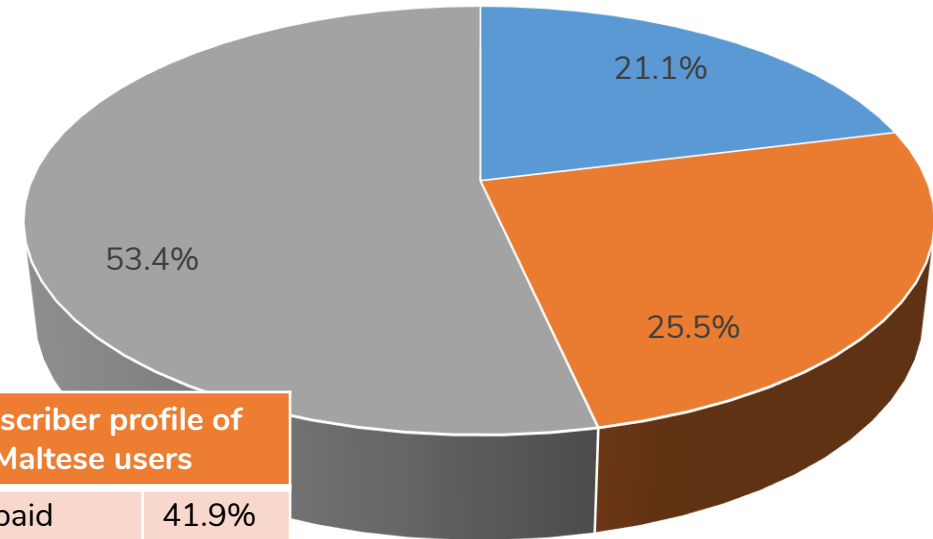
Share of respondents by type of subscription



3 respondents (2 from EU and 1 from non-EU) say they only have an international subscription. They do not intend to stop the international subscription or to get a local one instead.

Share of respondents with a local subscription, by type of plan

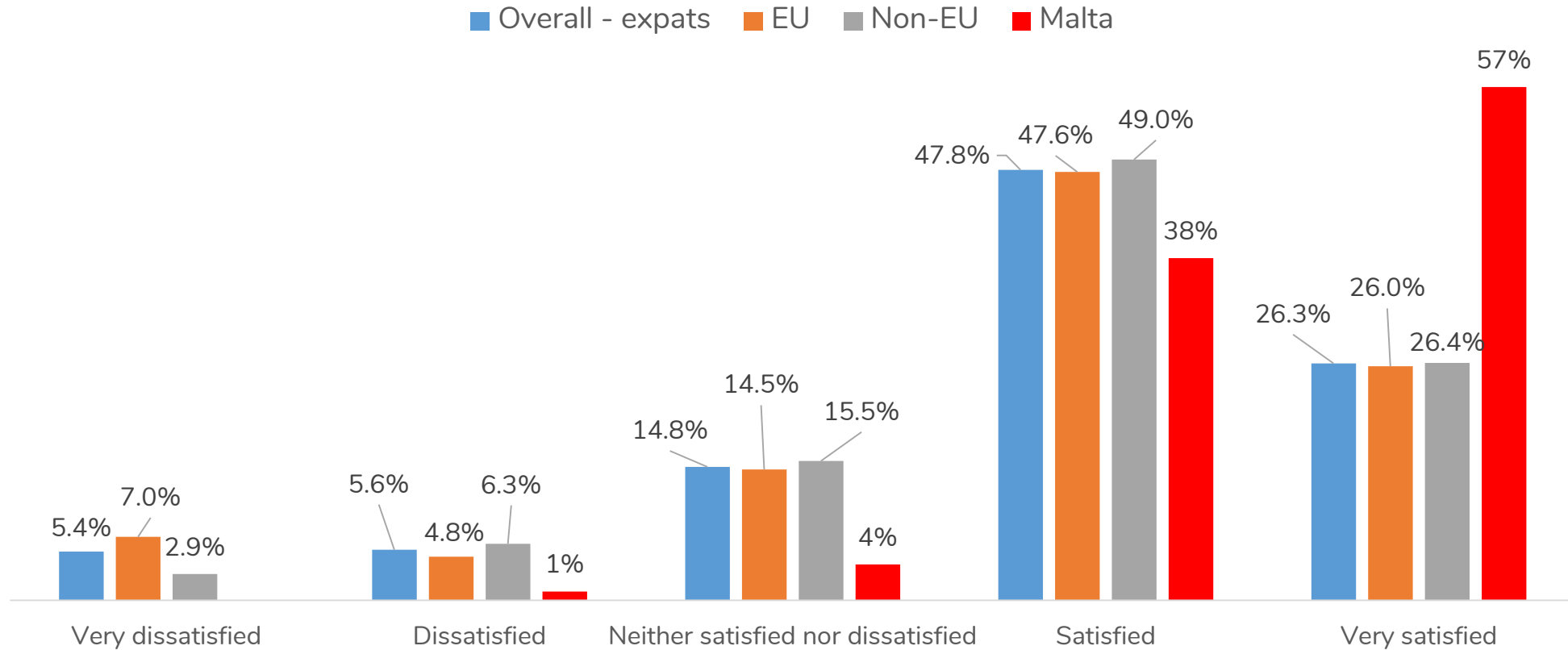
■ Post-paid ■ Post-paid in a bundle ■ Pre-paid



Subscriber profile of Maltese users	
Post-paid	41.9%
Pre-paid	58.1%

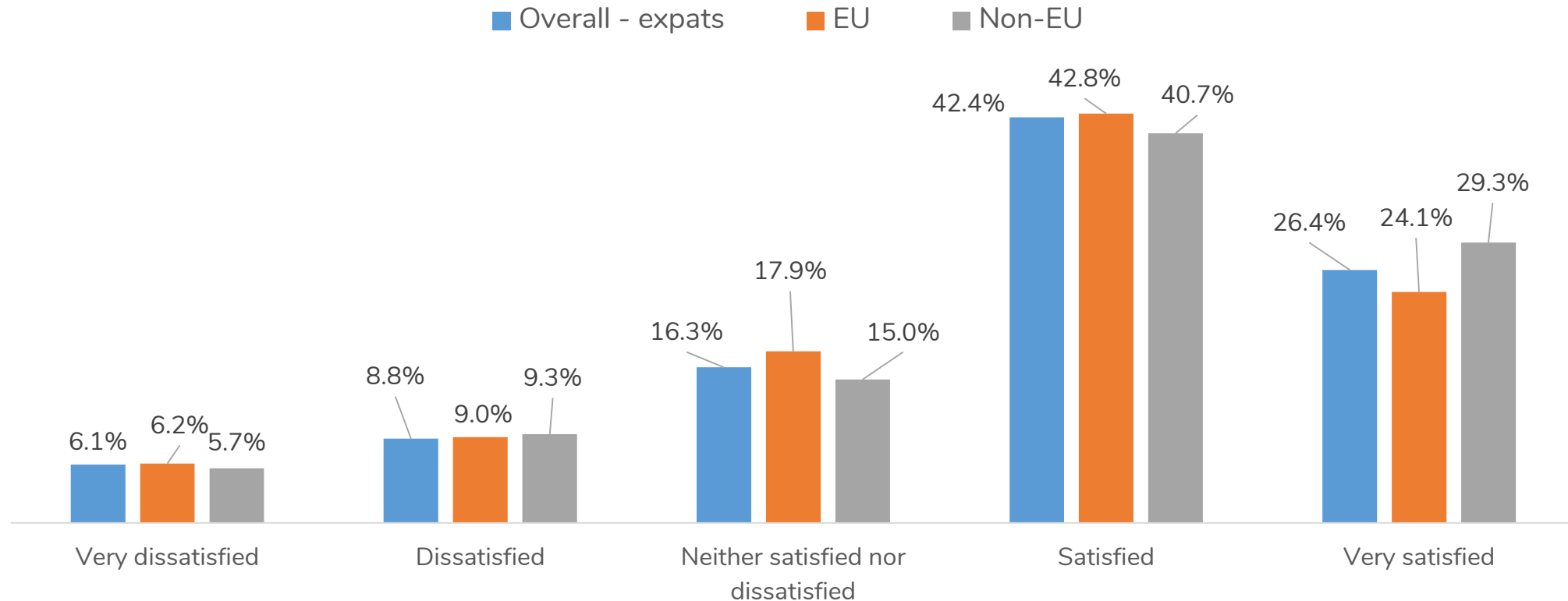
21 respondents (8 from EU and 13 from non-EU) say they have no mobile telephony subscription. 4 of these (1 from EU and 3 from non-EU) intend to get a local subscription.

Level of satisfaction with service used



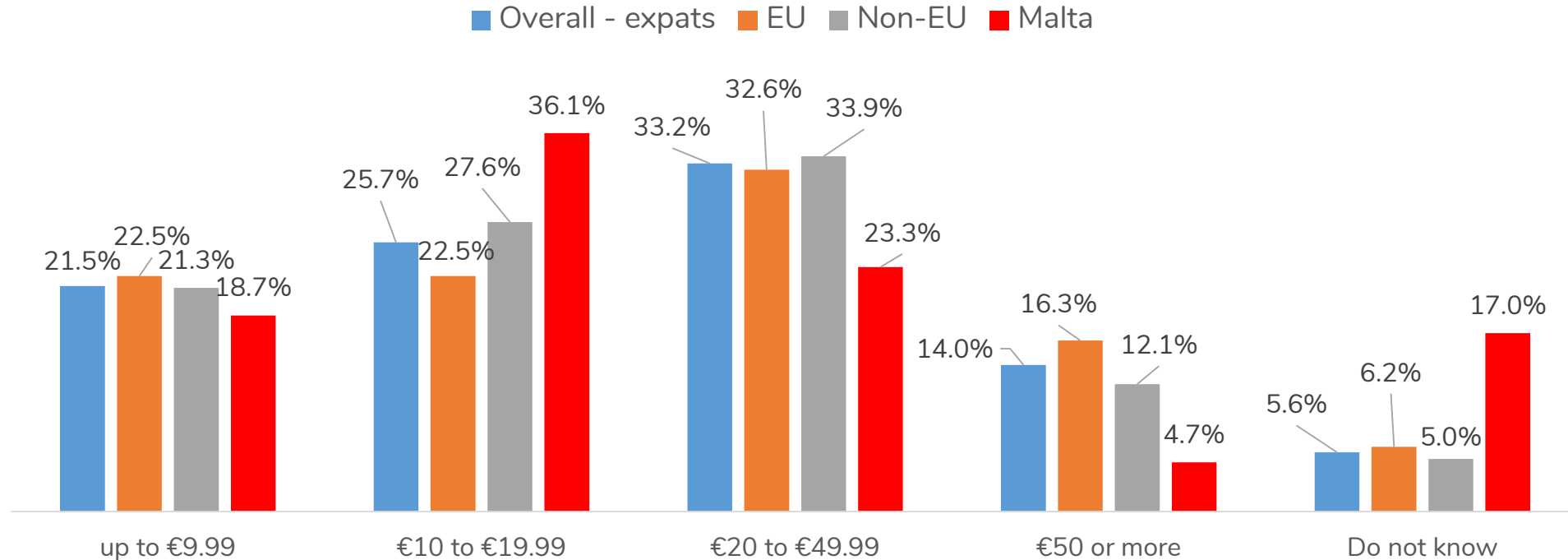
Malta figures sourced from the latest Consumer Perceptions Survey carried out by EMCS on behalf of MCA in Q3 2019.

Level of satisfaction with fault resolution



Almost 62% of survey respondents chose to reply to this question indicating that at some point they had some issue / fault to report to local service providers.

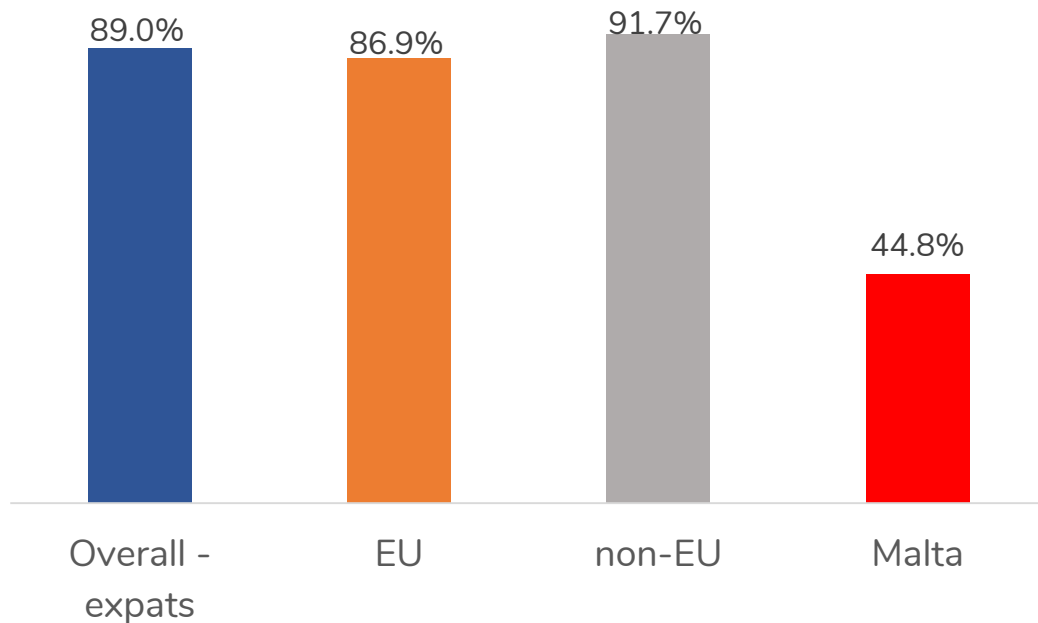
Average monthly expenditure



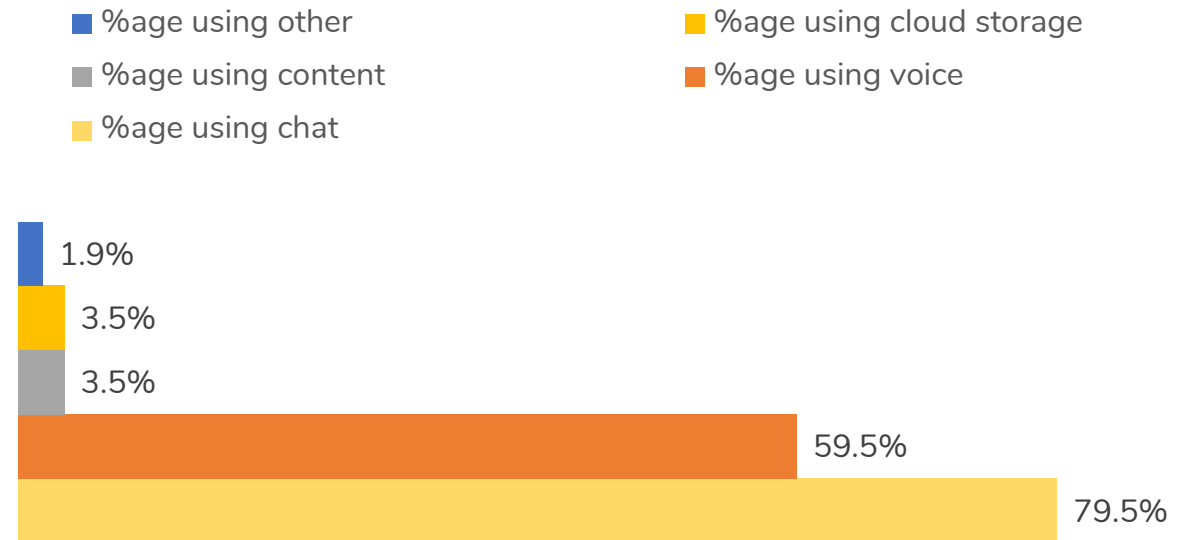
Malta figures sourced from the latest Consumer Perceptions Survey carried out by EMCS on behalf of MCA in Q3 2019.

Expats seem to be bigger spenders than the Maltese and this may be attributed to a bigger dependence on the mobile subscription when it comes to data consumption. Also, expats may have a bigger incentive to track their monthly expenses.

Share of respondents with a mobile subscription using OTTs



Share of expat respondents with a mobile subscription using the different OTT services



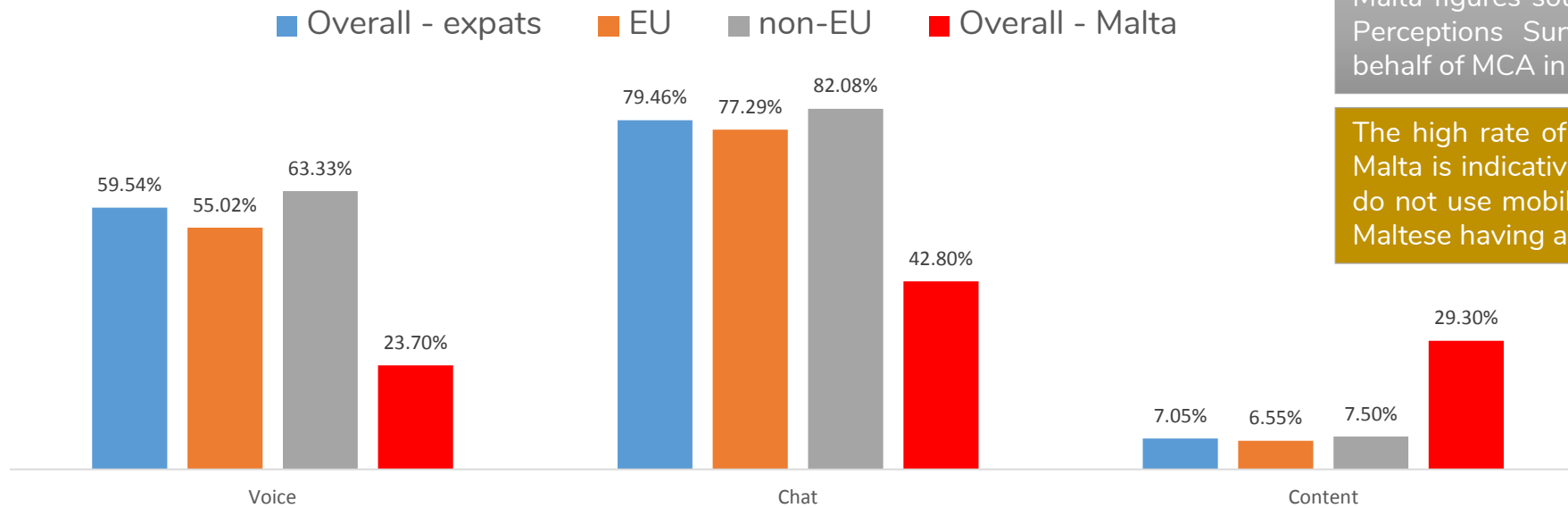
Malta figures sourced from the latest Consumer Perceptions Survey carried out by EMCS on behalf of MCA in Q3 2019.

The high rate of OTT usage for expats in Malta is indicative that just around 9% of expats do not use mobile data, compared to 45% of all Maltese having a mobile telephony subscription.

Share of respondents with a mobile subscription using the different OTTs

Malta figures sourced from the latest Consumer Perceptions Survey carried out by EMCS on behalf of MCA in Q3 2019.

The high rate of OTT usage for expats living in Malta is indicative that just around 9% of expats do not use mobile data, compared to 45% of all Maltese having a mobile telephony subscription.



Most commonly used voice app. by expats

- Whatsapp at 55.7%;
- Facebook Messenger at 35.5%;
- Vibre at 18.5%;
- Other at 13.9%;
- Skype at 8.0%.

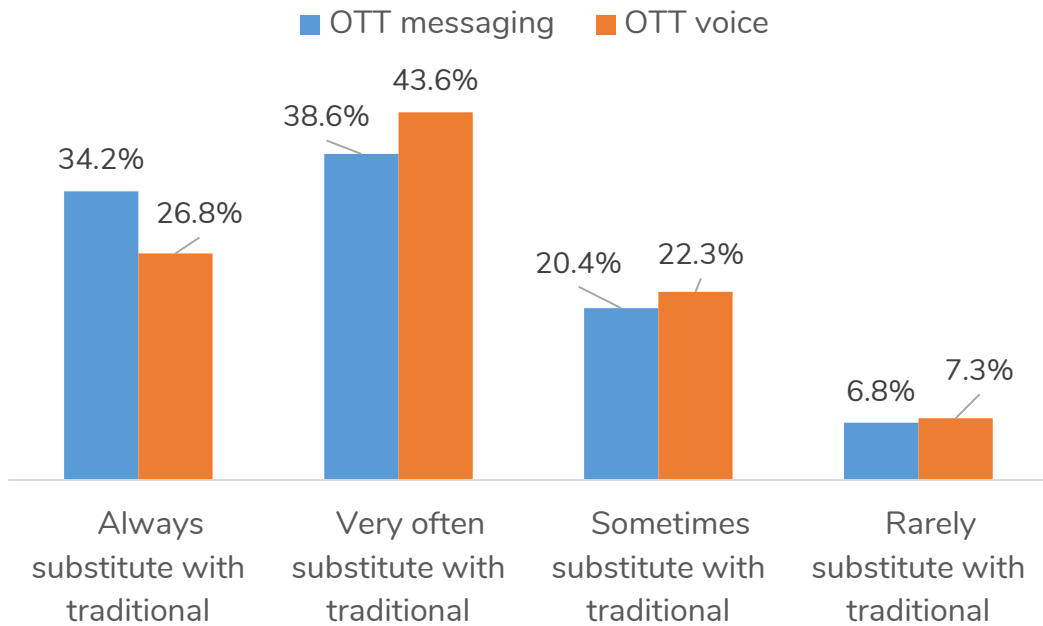
Most commonly used messaging app. by expats

- Whatsapp at 62.1%;
- Facebook Messenger at 50.7%;
- Other at 12.0%;
- Vibre at 7.8%;
- Skype at 2.4%.

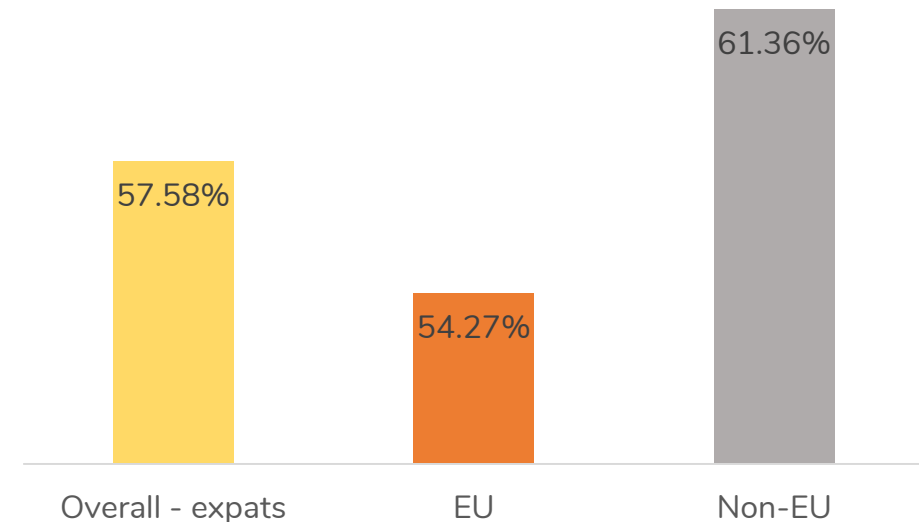
Most commonly used content app. By expats

- Youtube at 47.8%;
- Other at 52.2%.

Substitutability between OTT and traditional mobile voice and messaging



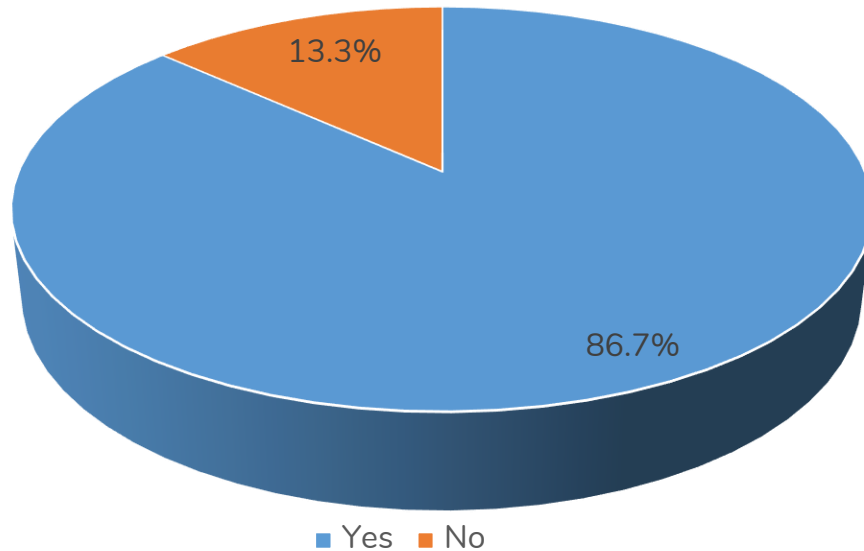
Percentage of expats using OTTs saying they access free wi-fi hotspots to use such services



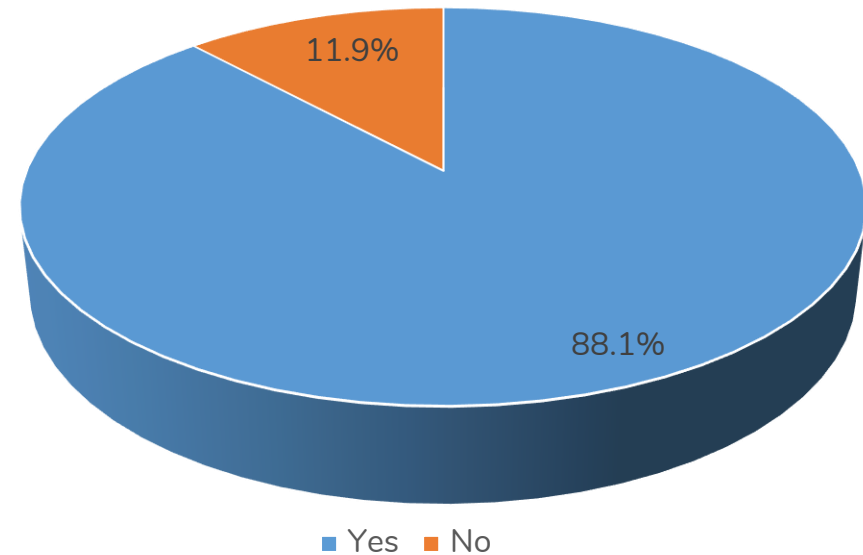
Despite the widespread subscription to post-paid plans and thus wider availability of voice / SMS / data allowances, expats in Malta frequently switch to OTT-based services rather than use traditional voice and messaging facilities.

Take up of fixed broadband

Share of expat respondents with a fixed broadband subscription at place of residence



Share of expat respondents with a mobile telephony subscription alongside a fixed broadband subscription



The high rate of OTT usage for expats living in Malta is recorded notwithstanding that above 85% of all survey respondents say they also have a fixed broadband connection at their residence.

65.8% of all expats with a fixed broadband subscription are bundling this service with other electronic communications services.

97% of all expats with no fixed broadband subscription have no intention to get one in the near future.

- Roam Like at Home (RLAH) regulation is largely being respected by expats in Malta beyond the statutory 2 or 3 months roaming limit. 95% of all expats living in Malta have a subscription with a local mobile telephony provider.
- 53% of all expats with a mobile subscription are on a pre-paid plan, notwithstanding their bigger dependence on mobile data and OTT-based services.
- 74% of all expats with a subscription to one of the local service providers are 'satisfied' to 'very satisfied' with the quality of service, similar to Maltese end-users.
- In the case of reported faults, almost 70% are happy with the response and resolution offered by the service provider.
- Expats are very conscious on the amount of money they spend on the service, but spend significantly more than Maltese in line with bigger take-up of post-paid plans.
- Expats are more avid users of OTT-based services, particularly in the case of voice and messaging activities. Maltese are more inclined to access OTT-based content.
- Despite their bigger reliance on mobile data and related OTT services, 87% of all expats have a fixed broadband subscription at their residence.



End

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