Press Release I 15th June, 2015

Developments for telecommunication and post: January to March 2015

The Malta Communications Authority (MCA) is hereby publishing the latest available data on the telecommunications and postal sectors in Malta for the first quarter (Q1) of 2015.

A Data Report Sheet (DRS) listing a number of indicators for the aforementioned sectors is also available with this publication. Data in the DRS is presented on a quarterly basis, covering the period Q1 2011 to Q1 2015.

Telecommunications: Q1 2015

Fixed telephony

The number of fixed telephony subscriptions totaled 230,962 by the end of March 2015, up by 0.2 per cent when compared to March 2014. During this period, the number of post-paid subscriptions was up by 12,904 whilst the number of pre-paid subscriptions was down by 12,355.

Fixed line originating traffic was down in Q1 2015 when compared to the same period a year earlier. The number of fixed line voice calls was down by 7.4 per cent and the number of fixed line voice call minutes was down by 8.8 per cent.

On a per user level, the average number of fixed line voice calls fell from 180 in Q1 2014 to 166 in Q1 2015. At the same time, the average number of fixed line voice call minutes was also down, from 654 to 597.

Fixed telephony	2012	2013	2014	2014 Q1	2015 Q1	absolute change Q1 2015 / Q1 2014	percentage change Q1 2015 / Q1 2014
Subscriptions (end of period)	229,740	231,331	230,361	230,413	230,962	549	0.24%
pre-paid	35,282	36,788	21,812	33,812	21,457	-12,355	-36.54%
post-paid (incl. enhanced subscription)	194,458	194,543	208,549	196,601	209,505	12,904	6.56%
Traffic volumes - originating							
number of voice calls	192,324,278	178,876,361	164,581,559	41,461,400	38,390,470	-3,070,930	-7.41%
number of voice call minutes	655,849,399	613,863,777	577,089,201	151,067,074	137,781,981	-13,285,093	-8.79%
Usage levels per subscriber							
average number of voice calls	833	776	713	180	166	-13	-7.32%
average number of voice call minutes	2,840	2,663	2,500	654	597	-57	-8.71%

Table 1: Take-up and traffic activity levels for the fixed line sector

Mobile telephony

The number of mobile telephony subscriptions reached 554,468 by the end of March 2015, up by 3.7 per cent when compared to the end of March 2014. During this period, the number of post-paid subscriptions was up by 12,374 and the number of pre-paid subscriptions was up by 7,350.

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Mobile originating traffic was stronger in Q1 2015 when compared to the same period a year earlier. The number of mobile voice calls was up by 2.8 per cent and the number of mobile voice call minutes was up by 8.1 per cent.

The number of SMSs sent was down by 10.6 per cent in Q1 2015 when compared to the same period a year earlier. On a per user level, the average number of mobile voice calls increased from 220 in Q1 2014 to 224 in Q1 2015 and the number of mobile voice call minutes increased from 308 to 330. At the same time, the average number of SMSs was down to 208 from 235.

Mobile telephony	2012	2013	2014	2014	2015	absolute change	percentage change
				Q1	Q1	Q1 2015 / Q1 2014	
Subscriptions (end of period)	532,228	556,652	546,214	534,744	554,468	19,724	3.69%
pre-paid	420,281	434,975	413,754	411,199	418,549	7,350	1.79%
post-paid	111,947	121,677	132,460	123,545.00	135,919	12,374	10.02%
Traffic volumes - originating voice							
number of voice calls	372,919,683	478,197,157	517,650,004	119,855,781	123,151,846	3,296,065	2.75%
number of voice call minutes	580,404,250	656,264,601	718,958,014	168,092,464	181,714,291	13,621,827	8.10%
Traffic volumes - originating SMSs	633,827,854	589,103,515	509,297,048	128,129,568	114,496,007	-13,633,561	-10.64%
Usage levels per subscriber							
average number of voice calls	708	878	939	220	224	4	1.88%
average number of voice call minutes	1,101	1,205	1,304	308	330	22	7.19%
average number of SMSs	1,203	1,082	924	235	208	-27	-11.40%

Table 2: Take-up and traffic activity levels for the mobile telephony sector

Fixed broadband

The number of fixed broadband subscriptions was up by 5.6 per cent (or 19,724) in the period under review, from 144,585 at the end of March 2014 to 152,659 at the end of March 2015.

The number of internet subscriptions with download speeds lower than 30Mbps was down by 14.5 per cent, from 78,175 at the end of Q1 2014 to 66,826 at the end of Q1 2015. This decline was outweighed by a 29.5 per cent increase in the number of internet subscriptions with download speeds ranging from 30Mbps to less than 100Mbps and a 10.5 per cent increase in the number of internet subscriptions with download speeds of 100Mbps or more. In absolute terms, the number of subscriptions in the former category was up by 19,314 and the number of subscriptions in the latter category was up by 109.

Fixed broadband	2012	2013	2014	2014	2015	absolute change	percentage change
				Q1	Q1	Q1 2015 / Q1 2014	
Subscriptions (end of period)	135,758	143,010	151,543	144,585	152,659	8,074	5.58%
less than 30Mbps	122,915	104,416	67,777	78,175	66,826	-11,349	-14.52%
between 30Mbps and less than 100Mbps	11,974	37,595	82,697	65,375	84,689	19,314	29.54%
100Mbps and greater	869	999	1,069	1,035	1,144	109	10.53%

Table 3: Take-up of fixed broadband

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MALTA COMMUNICATIONS AUTHORITY

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Pay TV

The number of pay TV subscriptions at the end of Q1 2015 was down by 0.6 per cent (or by 824) when compared to the same period a year earlier.

The number of analogue pay TV subscriptions was down by 7.2 per cent, from 7,186 at the end of March 2014 to 6,670 at the end of March 2015. The number of digital cable TV and digital terrestrial TV subscriptions was also down, by 2.2 per cent in the former case and by 8.7 per cent in the latter case.

In contrast, the number of IPTV subscriptions at the end of March 2015 was up by 91.3 per cent (or by 6,631) when compared to the end of March 2014.

Pay TV	**2012**	**2013**	**2014**	**2014**	**2015**	**absolute change**	**percentage change**
				Q1	Q1	Q1 2015 / Q1 2014	
Subscriptions (end of period)	147,896	148,905	147,880	148,545	147,721	-824	-0.55%
analogue subscriptions	8,516	7,495	6,848	7,186	6,670	-516	-7.18%
digital subscriptions	139,380	141,410	141,032	141,359	141,051	-308	-0.22%
digital cable	73,252	73,172	71,298	72,686	71,082	-1,604	-2.21%
digital terrestrial (DTTV)	62,292	62,284	57,478	61,409	56,074	-5,335	-8.69%
internet protocol (IPTV)	3,836	5,954	12,256	7,264	13,895	6,631	91.29%

Table 4: Take-up of pay TV

Post: Q1 2015

Overall, postal traffic volumes in Q1 2015 were down by 3.9 per cent when compared to the same period a year earlier.

The number of standard letter mail items delivered in Q1 2015 was only marginally down when compared to the same period in 2014. At the same time, the number of bulk mail items was down by 6.7 per cent (or by 410,463).

Positive changes were recorded in the case of registered mail and parcel mail items, with the number of deliveries in the former case increasing 5.5 per cent (or by 15,193) in Q1 2015 when compared to Q1 2014 and by 14.3 per cent (or by 13,935) in the latter case.

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Postal sector	2012	2013	2014	2014	2015	absolute change	percentage change
				Q1	Q1	Q1 2015 / Q1 2014	
Mail volumes	41,725,107	41,541,588	40,031,423	9,814,254	9,431,914	-382,340	-3.90%
standard letter mail	17,486,557	16,614,678	14,937,920	3,333,958	3,332,953	-1,005	-0.03%
bulk mail	22,930,358	23,470,349	23,417,698	6,105,770	5,695,307	-410,463	-6.72%
registered mail	1,037,073	1,060,777	1,259,090	277,355	292,548	15,193	5.48%
parcel mail	271,119	395,784	416,715	97,171	111,106	13,935	14.34%

Table 5: Postal traffic volumes

Notes

1. ***The data published in this release is based on quarterly submissions by local electronic communications and postal service providers to the Malta Communications Authority (MCA).***
2. ***Data should be considered as provisional and is therefore subject to revision. Each release may therefore include revisions of figures provided in previous publications.***
3. ***A more detailed overview of figures for electronic communications and post is available in a separate document with this release entitled Data Report Sheet (DRS).***
4. ***For further information about data in this publication, you are invited to visit the MCA website at www.mca.org.mt/market-overview.***

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