

Development for telecommunication and post: April to June 2015

The Malta Communications Authority (MCA) is hereby publishing the latest available data on the telecommunications and postal sectors in Malta for the second quarter (Q2) 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 Q2 2015.

Telecommunications: Q2 2015

Mobile telephony

The number of mobile telephony subscriptions totaled 562,978 by the end of June 2015, up by 2.7 per cent when compared to the end of June 2014. During this period, the number of post-paid subscriptions was up by 13,998 (or by 11.1 per cent) and the number of pre-paid subscriptions was up by 830 (or by 0.2 per cent).

Mobile traffic volumes in the second quarter of 2015 were stronger than recorded in the same period of 2014. The number of mobile voice calls was up by almost 8.0 million (or by 6.1 per cent) and the number of mobile voice call minutes was up by 20.6 million (or by 11.4 per cent).

The number of SMSs sent was down by 13.7 million (or by 10.6 per cent) in the second quarter of 2015 when compared to the same period a year earlier.

On a per user level, the average number of mobile voice calls went up from 243 in the second quarter of 2014 to 224 in the second quarter of 2015 and the number of mobile voice call minutes went up from 335 to 362. At the same time, the average number of SMSs was down to 206 from 238.

Mobile telephony	2012	2013	2014	2014	2015	absolute change	percentage change
				Q2	Q2	Q2 2015 / Q2 2014	
Subscriptions (end of period)	532,228	556,652	546,229	548,142	562,978	14,836	2.71%
pre-paid	420,281	434,975	413,769	421,437	422,275	838	0.20%
post-paid	111,947	121,677	132,460	126,705.00	140,703	13,998	11.05%
Traffic volumes - originating voice							
number of voice calls	372,919,683	478,197,157	517,647,231	131,529,774	139,492,415	7,962,641	6.05%
number of voice call minutes	580,404,250	656,264,601	718,958,014	181,356,919	201,999,751	20,642,832	11.38%
Traffic volumes - originating SMSs	633,827,854	589,103,515	509,297,048	128,873,756	115,184,639	-13,689,117	-10.62%
Usage levels per subscriber							
average number of voice calls	708	878	939	243	250	7	2.77%
average number of voice call minutes	1,101	1,205	1,304	335	362	27	7.94%
average number of SMSs	1,203	1,082	924	238	206	-32	-13.39%

Table 1: Take-up and traffic activity levels for the mobile telephony sector

For further information, you are kindly requested to contact:

Sharon Scerri, Coordinator: Media Relations & Online Communications, Malta Communications Authority

Tel: 2205 9406, Mob: 9906 6200, Email: pr@mca.org.mt

Malta Communications Authority, Valletta Waterfront, Pinto Wharf, Floriana FRN 1913 Tel: (+356) 21 336 840

Fixed telephony

The number of fixed telephony subscriptions totaled 228,991 by the end of June 2015, down by 1.5 per cent when compared to the end of June 2014. During this period, the number of post-paid subscriptions was up by 233 (or by 0.1 per cent) whilst the number of pre-paid subscriptions was down by 3,701 (or by 17.2 per cent).

The volume of originating fixed line calls and minutes in the second quarter of 2015 was lower than that recorded in the same period a year earlier. The number of fixed line voice calls was down by 7.5 per cent and the number of fixed line voice call minutes was down by 6.8 per cent.

On a per user level, the average number of fixed line voice calls fell from 183 in the second quarter of 2014 to 170 in the second quarter of 2015. At the same time, the average number of fixed line voice call minutes was also down, from 630 to 591.

Fixed telephony	2012	2013	2014	2014	2015	absolute change	percentage change
				Q2	Q2	Q2 2015 / Q2 2014	Q2 2015 / Q2 2014
Subscriptions (end of period)	229,740	231,331	230,361	232,469	228,991	-3,478	-1.50%
pre-paid	35,282	36,788	21,812	21,512	17,811	-3,701	-17.20%
post-paid (incl. enhanced subscrip	194,458	194,543	208,549	210,957	211,180	223	0.11%
Traffic volumes - originating							
number of voice calls	192,324,278	178,876,361	164,581,559	42,331,204	39,174,258	-3,156,946	-7.46%
number of voice call minutes	655,849,399	613,863,777	577,099,331	145,859,568	135,890,458	-9,969,109	-6.83%
Usage levels per subscriber							
average number of voice calls	833	776	713	183	170	-12.56	-6.87%
average number of voice call minut	2,840	2,663	2,500	630	591	-39.34	-6.24%

Table 2: Take-up and traffic activity levels for the fixed line sector

Fixed broadband

The number of fixed broadband subscriptions was up by 6,729 (or by 4.5 per cent) in the period under review, from 148,175 at the end of June 2014 to 154,904 at the end of June 2015.

The number of internet subscriptions with download speeds lower than 30Mbps was down by 15.8 per cent, from 77,564 at the end of June 2014 to 65,330 at the end of June this year.

This decline was outweighed by increases recorded in terms of the number of fixed broadband subscriptions supporting fast and ultra fast download speeds.

The number of fixed broadband subscriptions with download speeds of 30Mbps but less than 100Mbps was up by 26.6 per cent, from 69,594 at the end of June 2014 to 88,079 at the end of June 2015.

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The number of fixed broadband subscriptions with download speeds of 100Mbps or more was up by 47.0 per cent, from 1,017 at the end of June 2014 to 1,495 at the end of June 2015.

Fixed broadband	2012	2013	2014	2014	2015	absolute	percentage
				Q2	Q2	change	change
				Q2 2015 / Q2 2014			
Subscriptions (end of period)	135,758	143,010	151,557	148,175	154,904	6,729	4.54%
less than 30Mbps	122,915	104,416	67,791	77,564	65,330	-12,234	-15.77%
between 30Mbps and less than 100Mbps	11,974	37,595	82,697	69,594	88,079	18,485	26.56%
100Mbps and greater	869	999	1,069	1,017	1,495	478	47.00%

Table 3: Take-up of fixed broadband

Pay TV

The number of pay TV subscriptions at the end of June 2015 was down 927 (or by 0.6 per cent) when compared to the end of June 2014.

The number of analogue pay TV subscriptions was down by 671 (or by 9.3 per cent), from 7,208 at the end of June 2014 to 6,537 at the end of June 2015.

The number of digital Pay TV subscriptions was down by 256 (or by 0.2 per cent), from 141,950 at the end of June 2014 to 141,694 at the end of June 2015. Three types of digital pay TV packages are commercially available. These are digital cable packages, digital terrestrial (DTTV) packages and Internet protocol (IPTV) packages.

The number of pay TV subscriptions on digital cable was down by 1,160 (or by 1.6 per cent), from 72,757 at the end of June 2014 to 71,597 at the end of June 2015.

The number of DTTV subscriptions was down by 5,317 (or by 8.9 per cent), from 59,904 at the end of June 2014 to 54,587 at the end of June 2015.

On the other hand, the number of IPTV subscriptions was up by 6,221 (or by almost 67 per cent), from 9,289 at the end of June 2014 to 15,510 at the end of June 2015.

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Pay TV	2012	2013	2014	2014	2015	absolute change	percentage change
				Q2	Q2	Q2 2015 / Q2 2014	
Subscriptions (end of period)	147,896	148,905	147,880	149,158	148,231	-927	-0.62%
analogue subscriptions	8,516	7,495	6,848	7,208	6,537	-671	-9.31%
digital subscriptions	139,380	141,410	141,032	141,950	141,694	-256	-0.18%
digital cable	73,252	73,172	71,298	72,757	71,597	-1,160	-1.59%
digital terrestrial (DTTV)	62,292	62,284	57,478	59,904	54,587	-5,317	-8.88%
Internet protocol (IPTV)	3,836	5,954	12,256	9,289	15,510	6,221	66.97%

Table 4: Take-up of pay TV

Post: Q2 2015

The number of postal mail items that were delivered in the second quarter of 2015 was down by 911,808 (or by 8.9 per cent) when compared to the number of postal mail items that were delivered in the second quarter of 2014.

The number of standard letter mail items delivered in the second quarter of 2015 was down by 191,386 (or by 5.3 per cent) when compared to the same period in 2014.

The number of bulk mail items was also down, in this case by 736,858 (or by 6.7 per cent), from 6.3 million mail items in the second quarter of 2014 to 5.5 million mail items in the second quarter of this year.

Another drop in mail volumes was recorded in terms of registered mail. The number of registered mail items delivered in the second quarter of 2015 totalled 311,985. This figure is down by 1,421 (or by almost 0.5 per cent) when compared to the corresponding period a year earlier.

On the other hand, parcel mail volumes in the second quarter of 2015 were up by 17,857 (or by 19.1%) when compared to parcel mail volumes recorded in the second quarter of 2014.

Postal sector	2012	2013	2014	2014	2015	absolute change	percentage change
				Q2	Q2	Q2 2015 / Q2 2014	
Mail volumes	41,725,421	41,541,588	40,031,495	10,280,720	9,368,912	-911,808	-8.87%
standard letter mail	17,486,557	16,614,678	14,945,961	3,602,165	3,410,779	-191,386	-5.31%
bulk mail	22,930,358	23,470,349	23,417,698	6,271,469	5,534,611	-736,858	-11.75%
registered mail	1,037,073	1,060,777	1,259,090	313,406	311,985	-1,421	-0.45%
parcel mail	271,433	395,784	408,746	93,680	111,537	17,857	19.06%

Table 5: Postal traffic volumes

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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.*

END

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