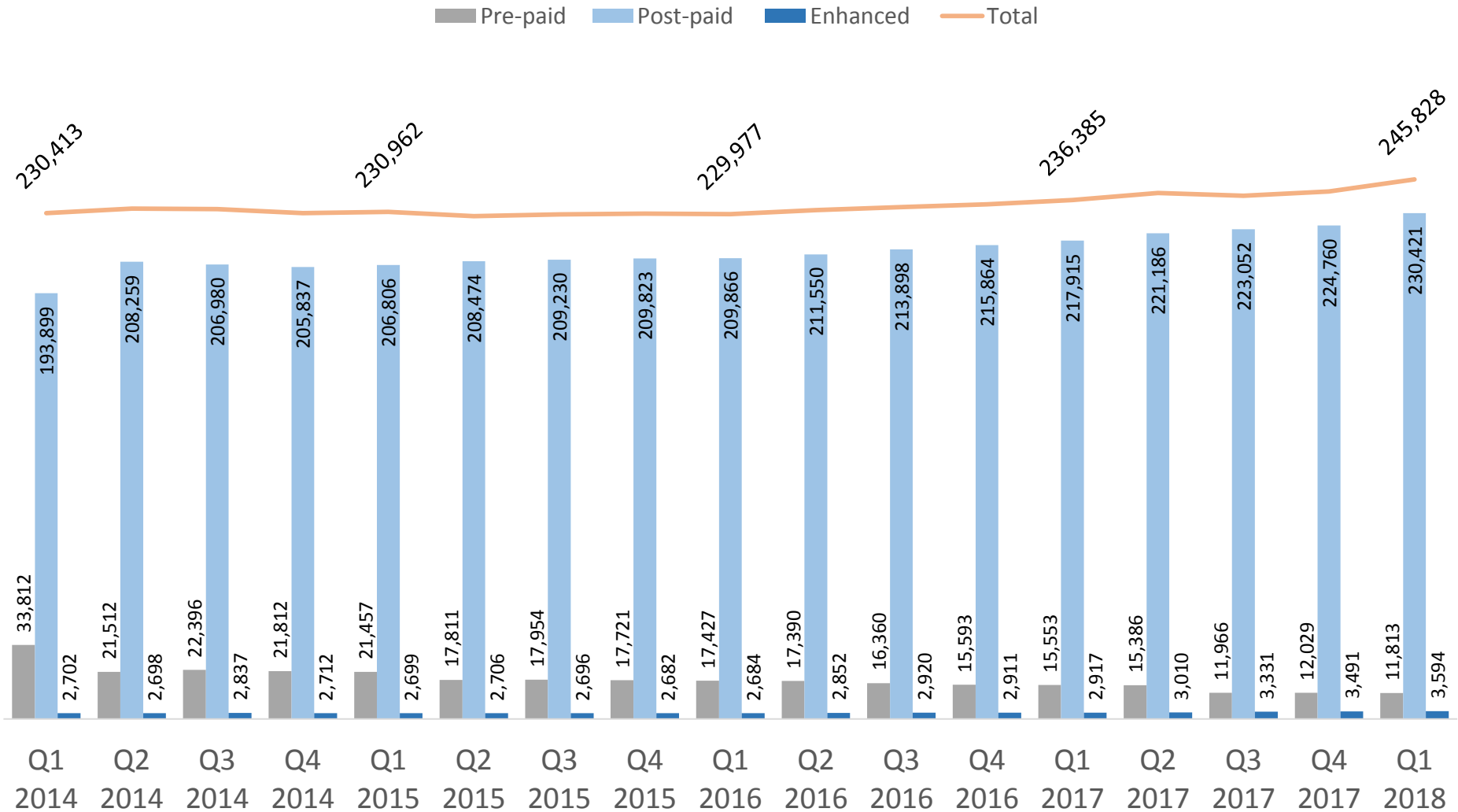




MCA Market Trends - Q1 2014 to Q1 2018

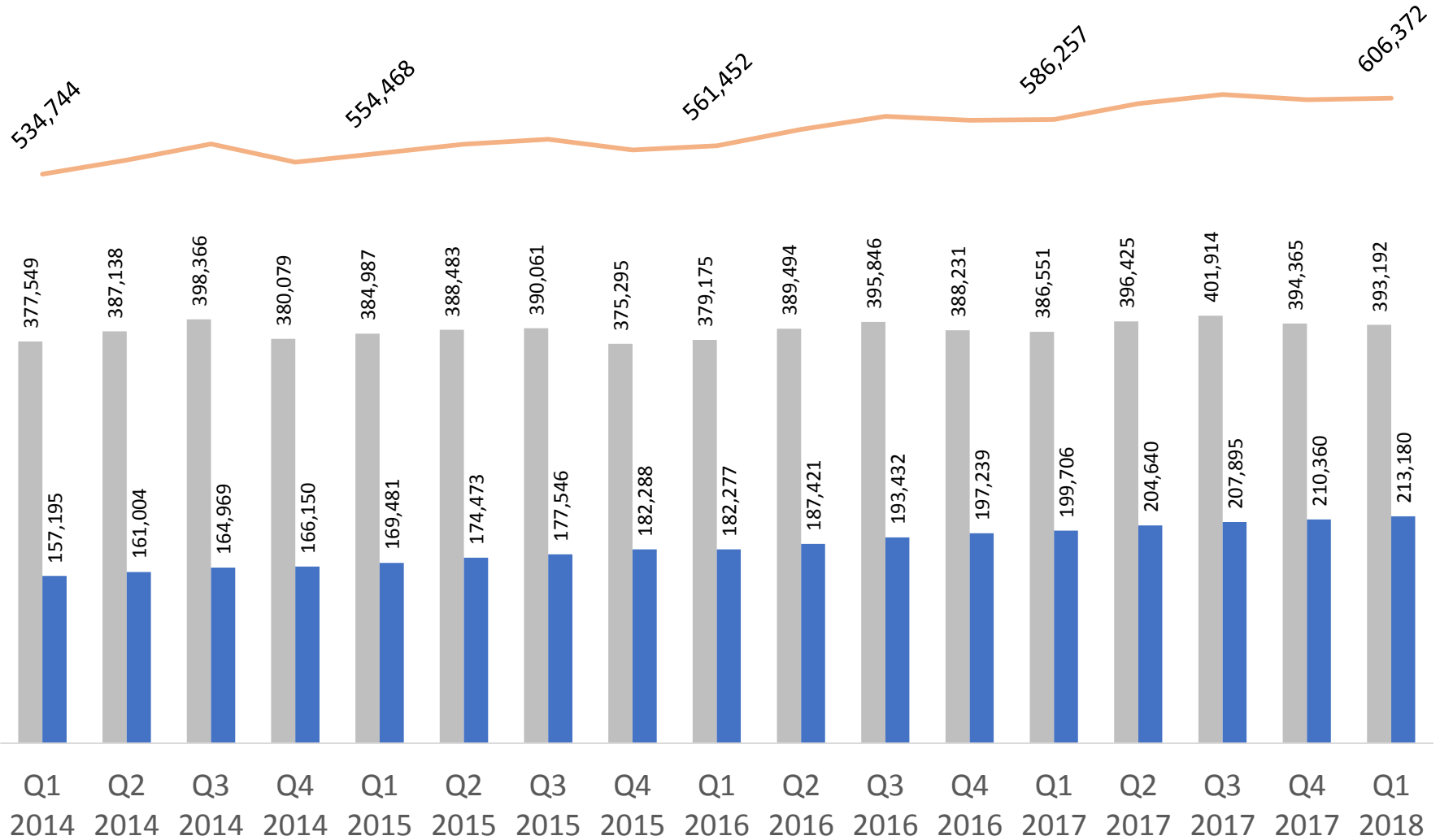
- This presentation is in support to the Data Report Sheet (DRS) highlighting on the main market trends for electronic communications and post on a quarterly basis.
- Main indicators:
 - ✓ Number of subscriptions and ARPU for the telecoms sector:
 - (i) fixed telephony; (ii) mobile telephony (iii) fixed broadband (iv) pay TV;
 - ✓ Mail volumes for the postal sector.

Fixed telephony – subscriptions as at end of period

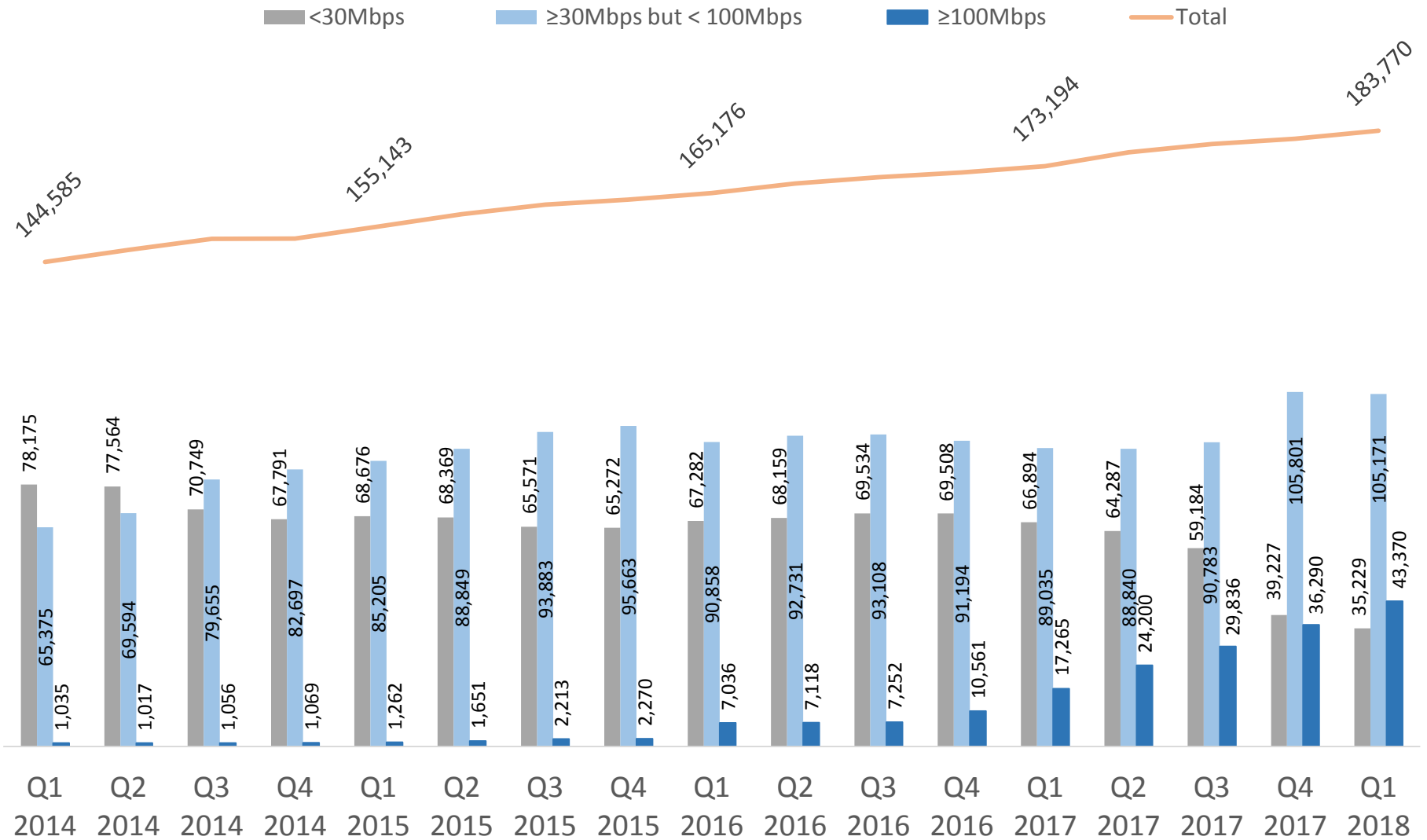


Mobile telephony – subscriptions as at end of period

Pre-paid Post-paid Total

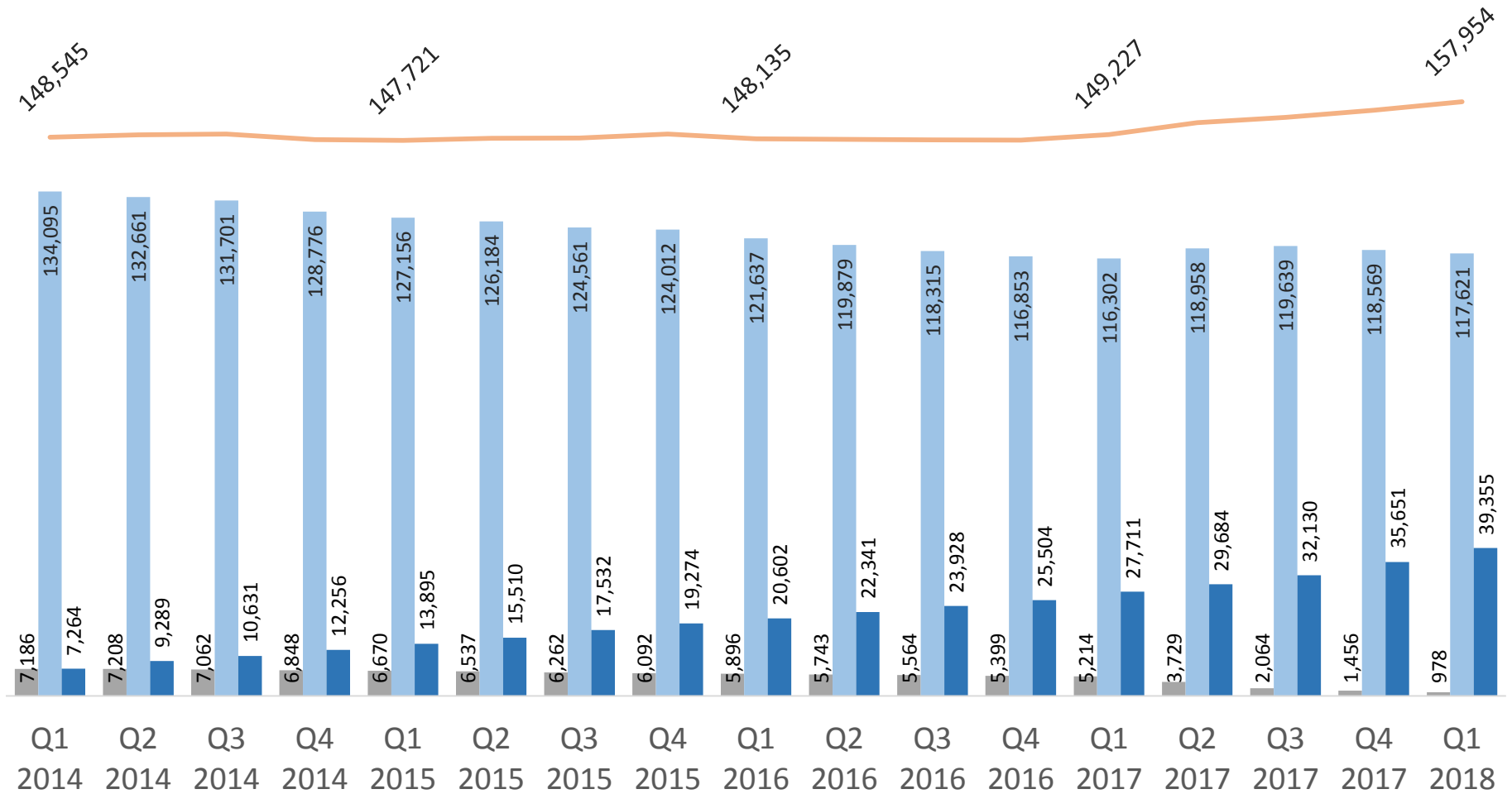


Fixed broadband– subscriptions as at end of period



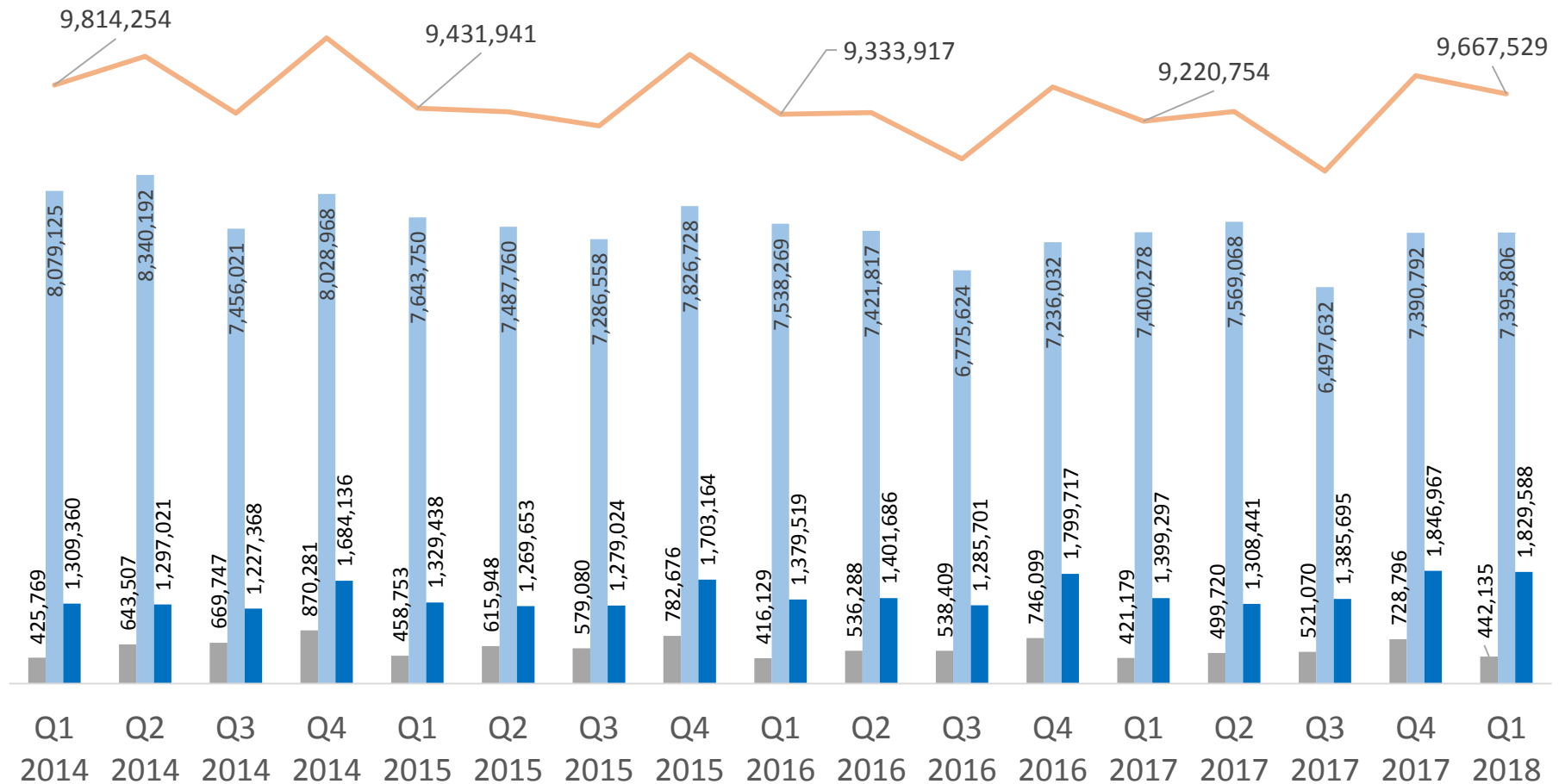
Pay TV– subscriptions as at end of period

■ Analogue ■ Digital ■ IPTV — Total subscriptions



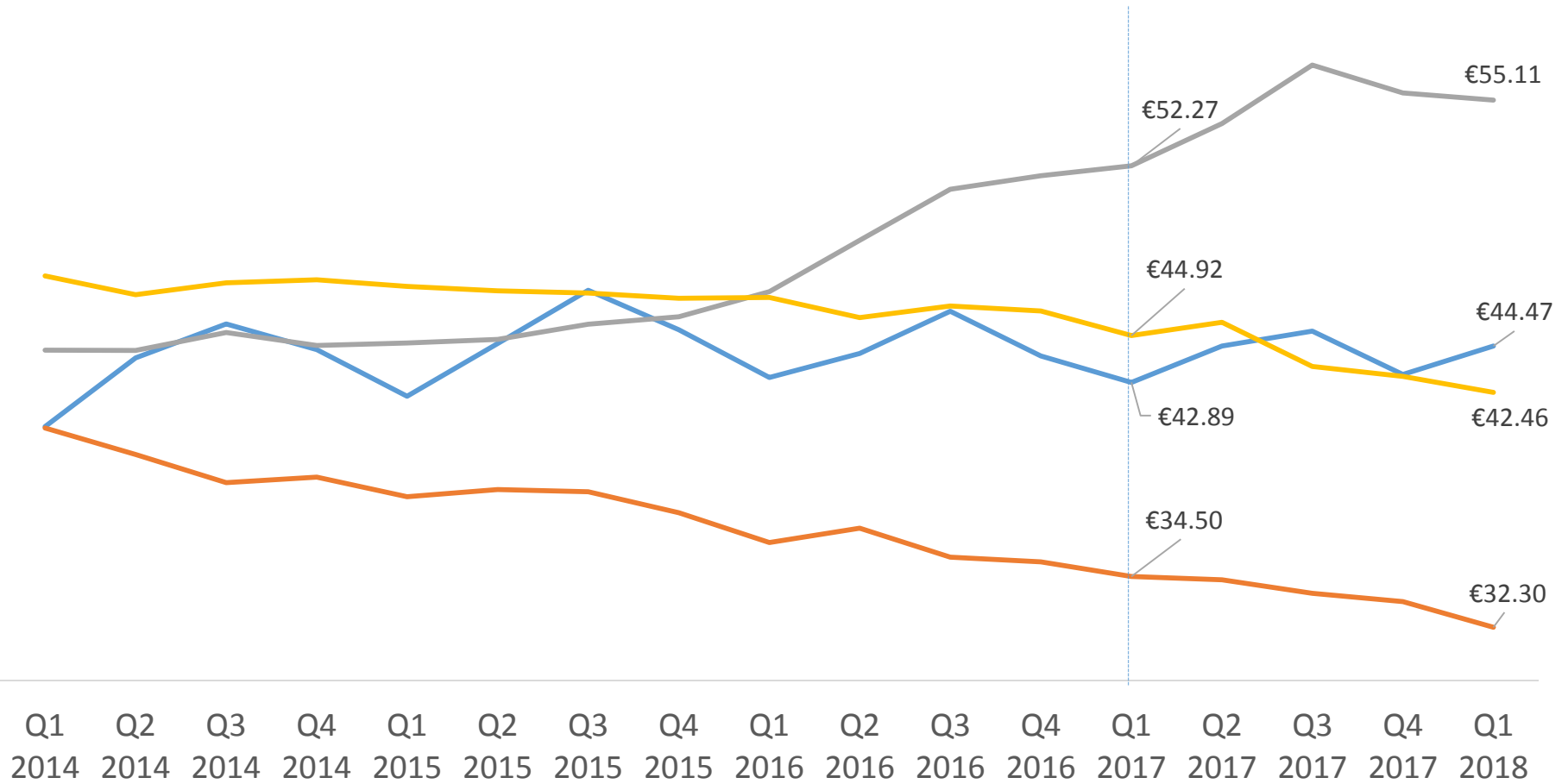
Postal – mail volumes

■ Outbound cross border mail items
 ■ Domestic mail items
 ■ Inbound cross border mail items
 — Postal mail volumes



Average revenue per user (ARPU, €)

— Mobile telephony — Fixed line telephony — Fixed broadband — Pay TV





END

Malta Communications Authority

Valletta Waterfront,
Pinto Wharf, Floriana,
FRN 1913, Malta

T + 356 2133 6840
F + 356 2133 6846

E info@mca.org.mt
W www.mca.org.mt

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