

# MCA Market Trends - Q1 2020 to Q4 2024

*Figures based on the Data Report Sheet (DRS) publication*

*MCA publication reference: MCA/R/25-5603*



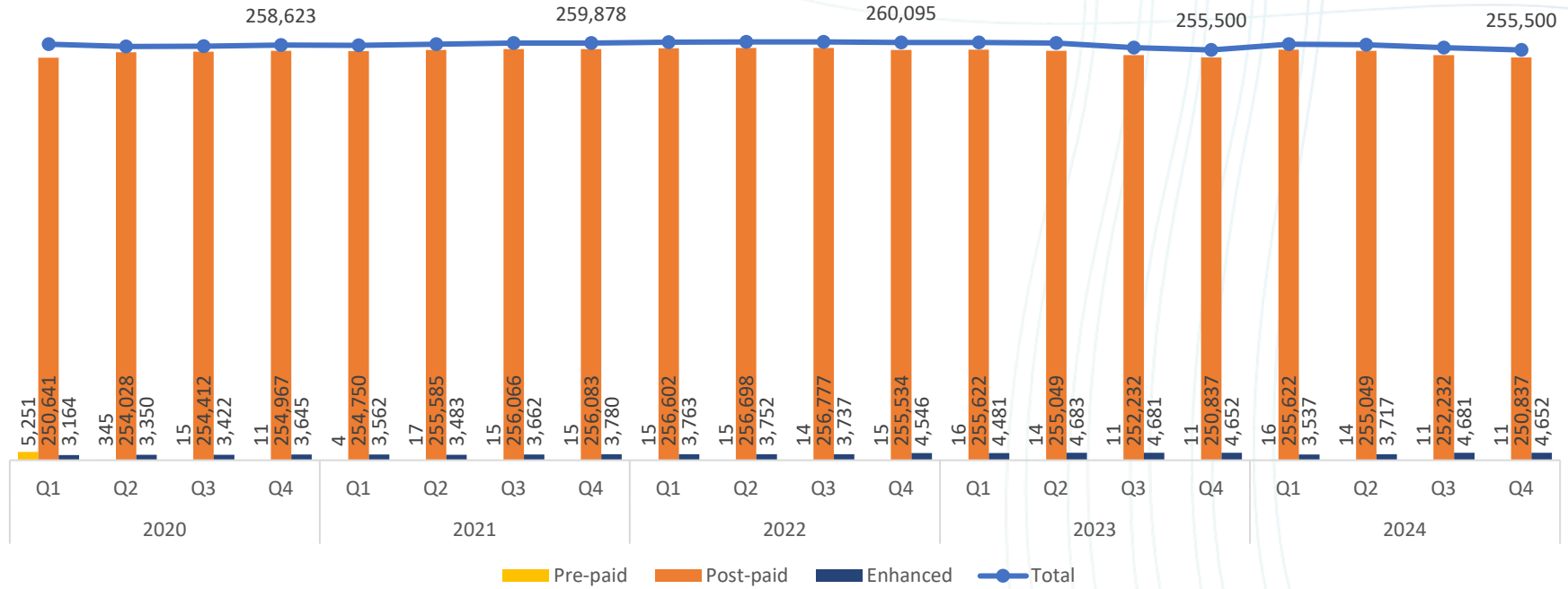
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# Purpose

- Figures in this presentation are based on the latest Data Report Sheet (DRS) publication.
- Main indicators:
  - Number of subscriptions and ARPU for:
    - (i) fixed telephony
    - (ii) mobile telephony
    - (iii) fixed broadband
    - (iv) pay-TV
    - (v) bundles;
  - Mobile data volumes consumed by mobile telephony subscribers;
  - Number of connections for high-end connectivity services;
  - Mail volumes for the postal sector.
- Data freeze carried out on 25<sup>th</sup> March 2025.

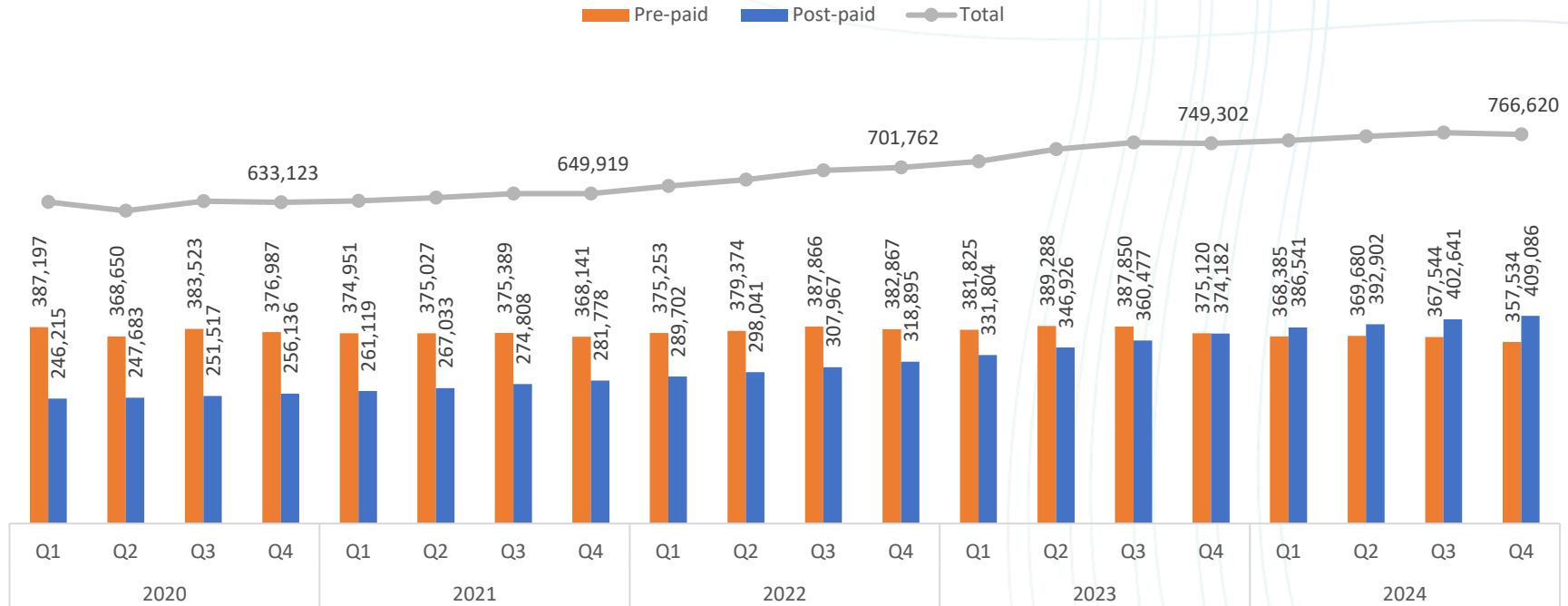
# Fixed telephony

## Subscriptions as at end of period

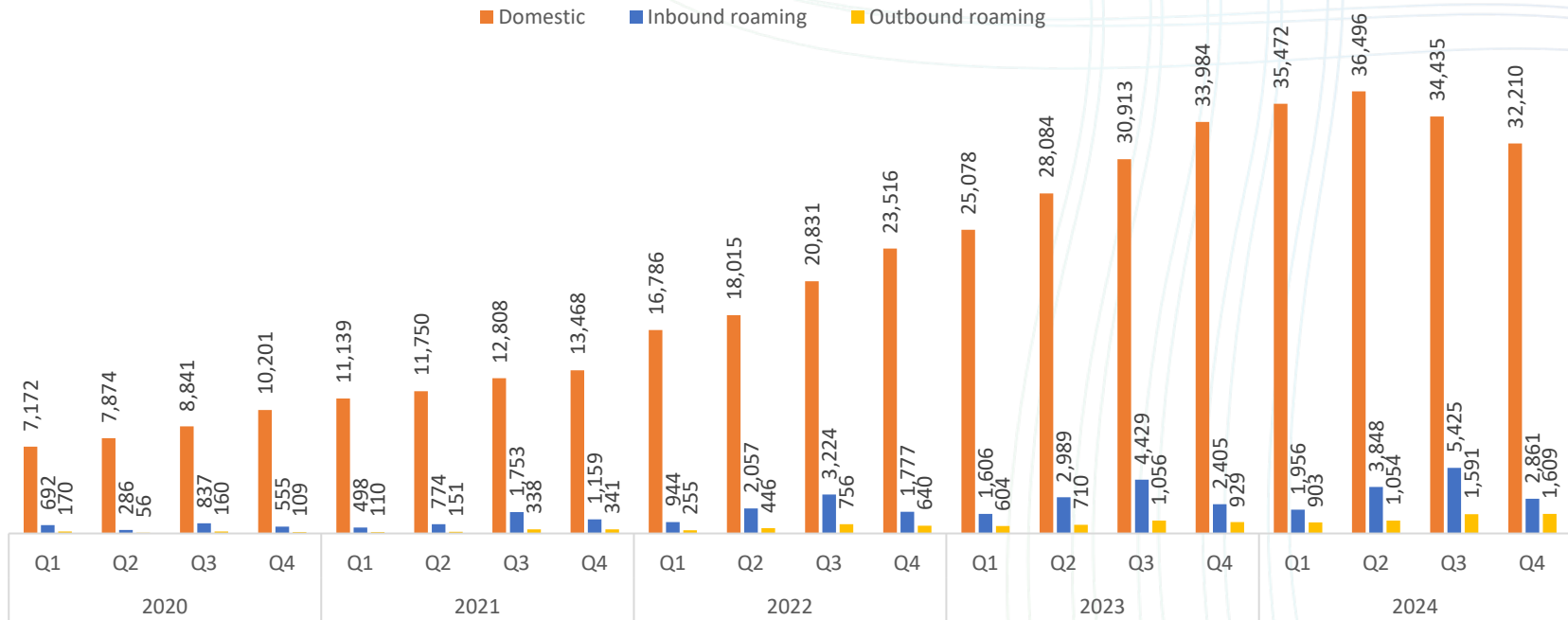


# Mobile telephony

## Subscriptions as at end of period

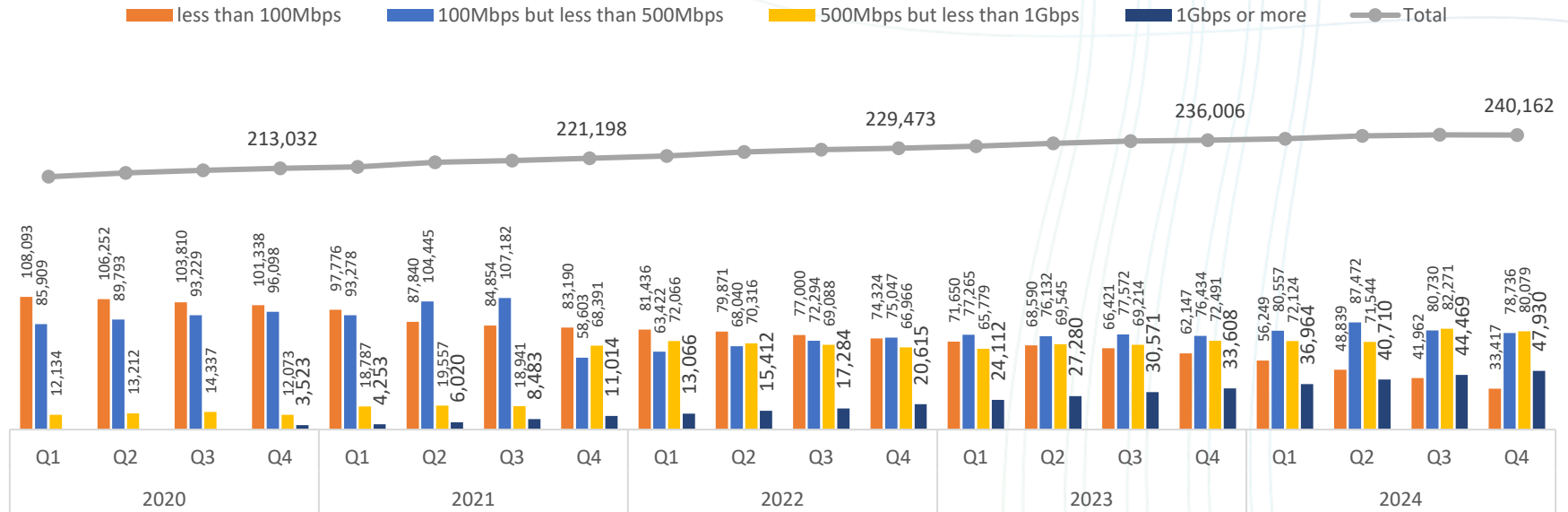


# Mobile telephony - data volumes (in million MBs)



# Fixed broadband

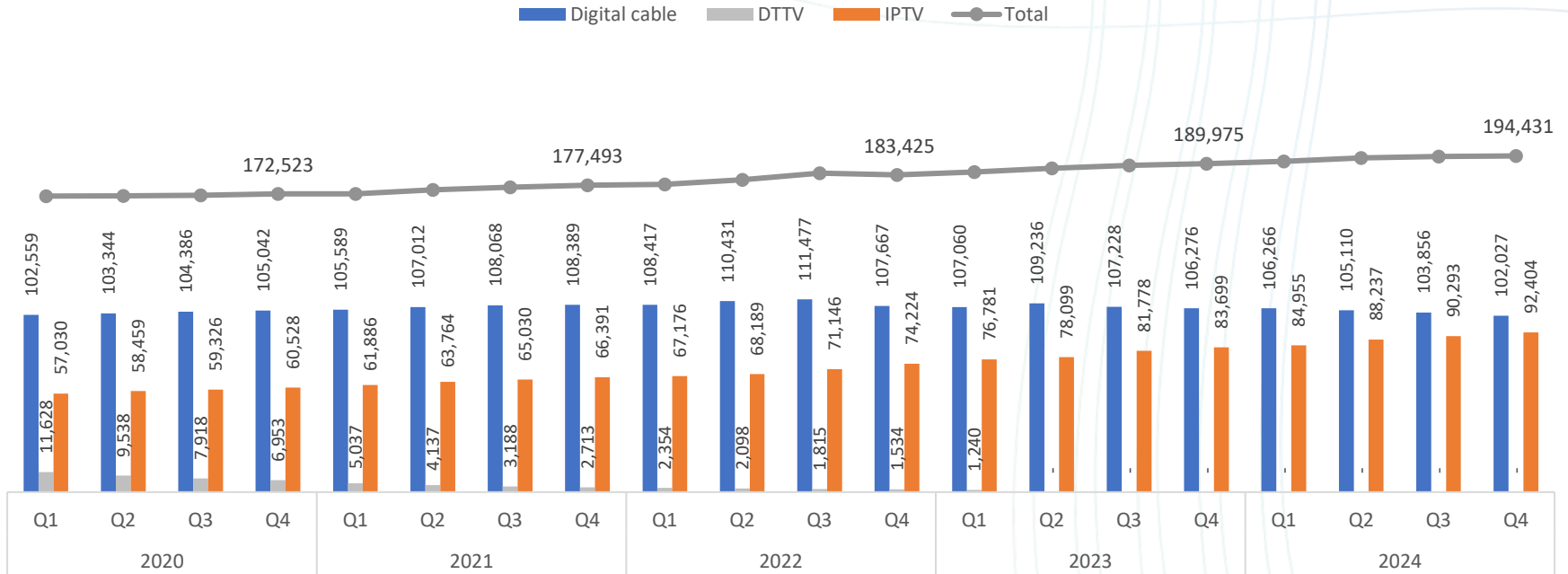
## Subscriptions as at end of period



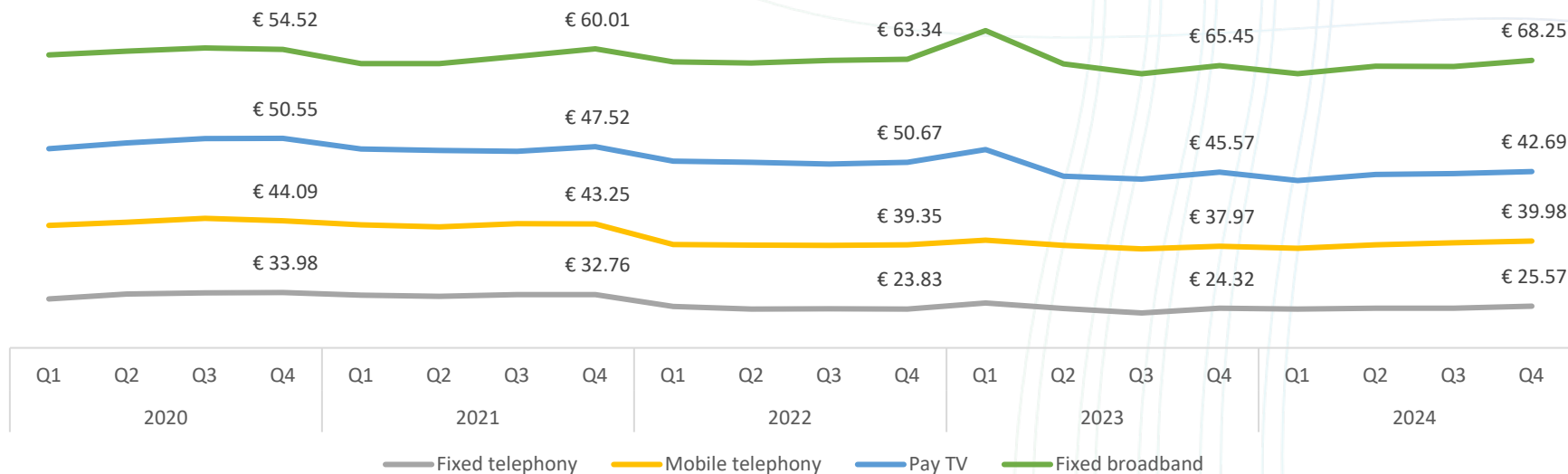
Specific data for 1Gbps or more is not available prior Q3 2020, due to a different classification used.

# Pay-TV

## Subscriptions as at end of period



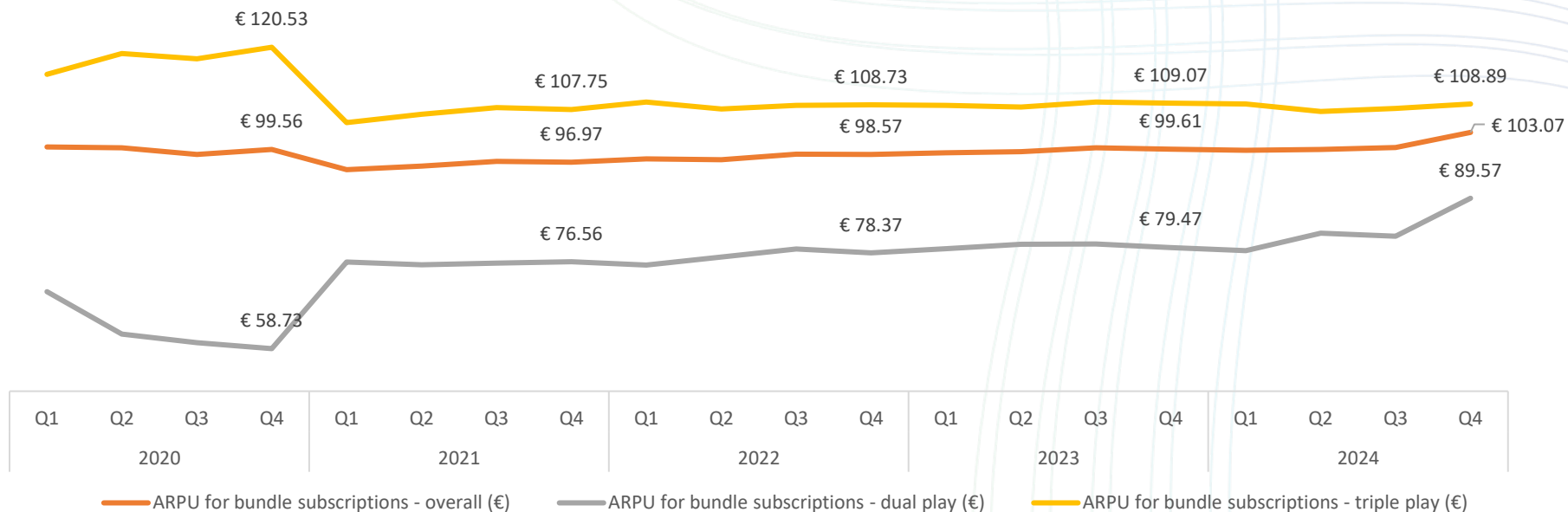
# Average revenue per user (ARPU, €)



This indicator captures the average quarterly revenue per subscription reported by local service providers for each service. The revenue element for each individual service is composed of both stand-alone and bundle revenues from subscriptions to a specific service but excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to individual services.



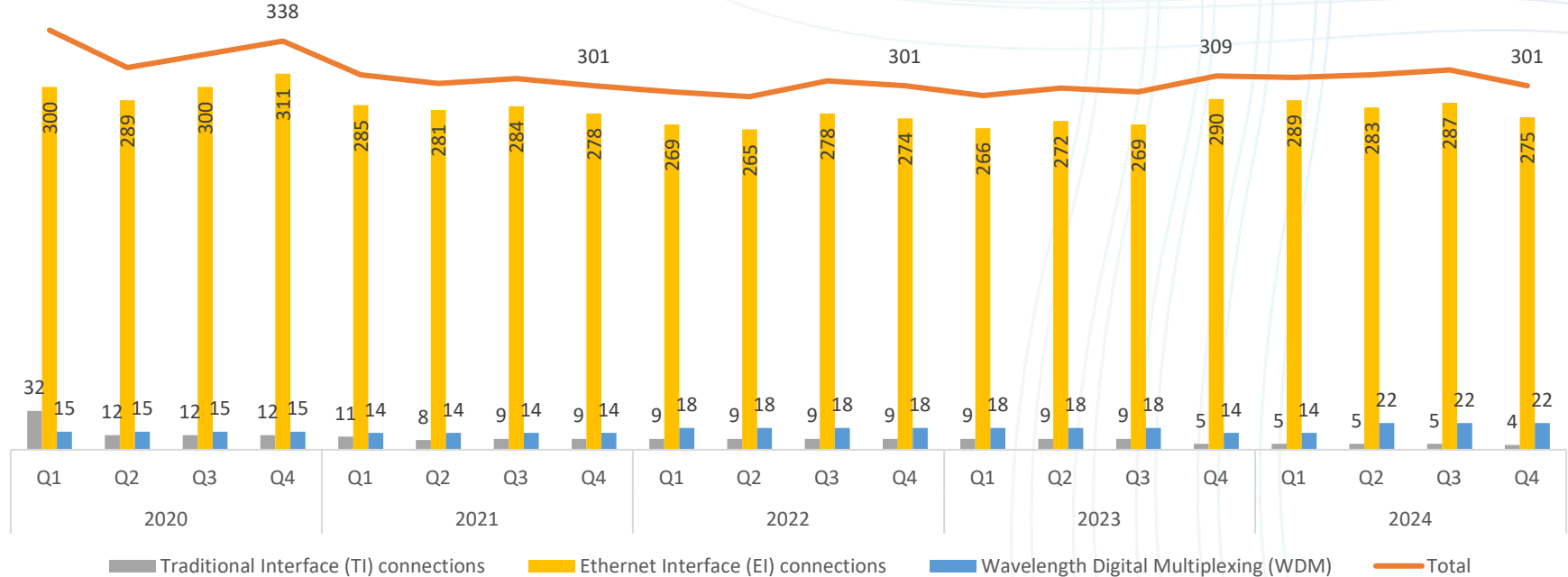
# Bundle ARPU (€)



This indicator captures the average quarterly revenue per subscription reported by local service providers for bundle service. The revenue element for each bundle excludes installation and connection revenues. Readers should note that operators are left at their discretion to allocate their bundled revenues to individual services.

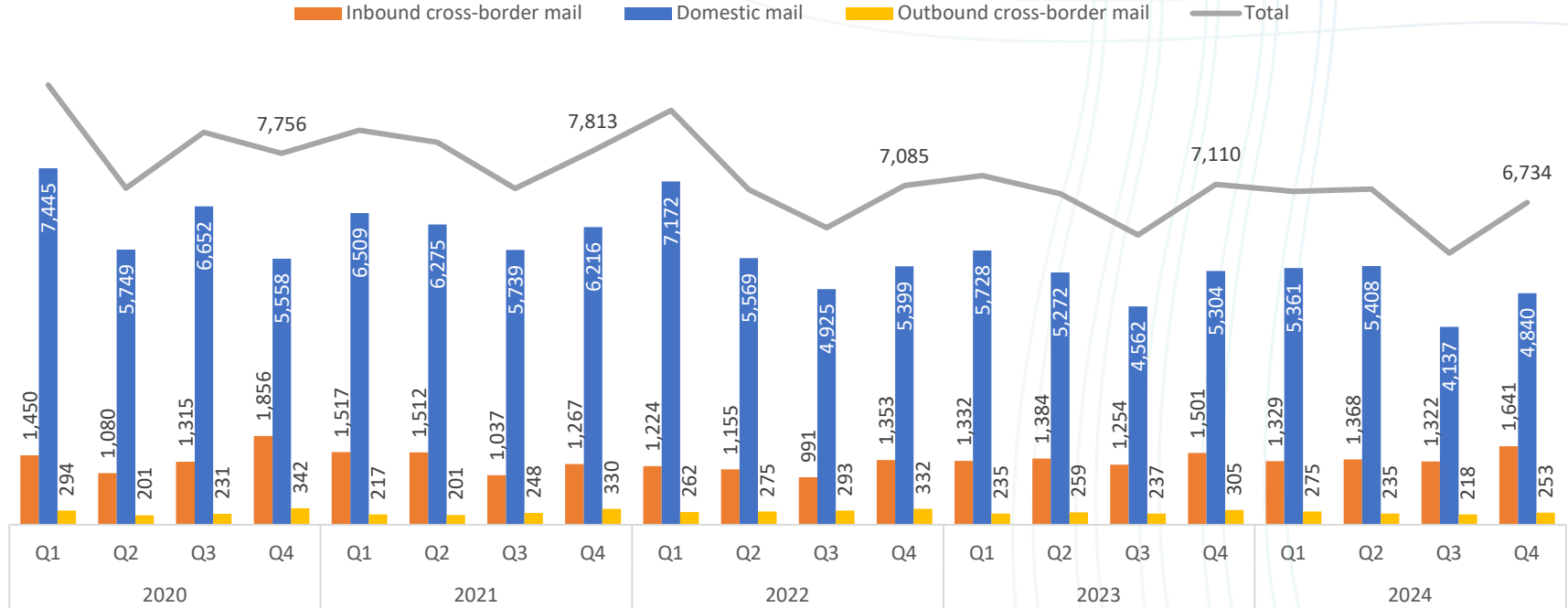
# High-end connectivity

National retail connections as at end of period



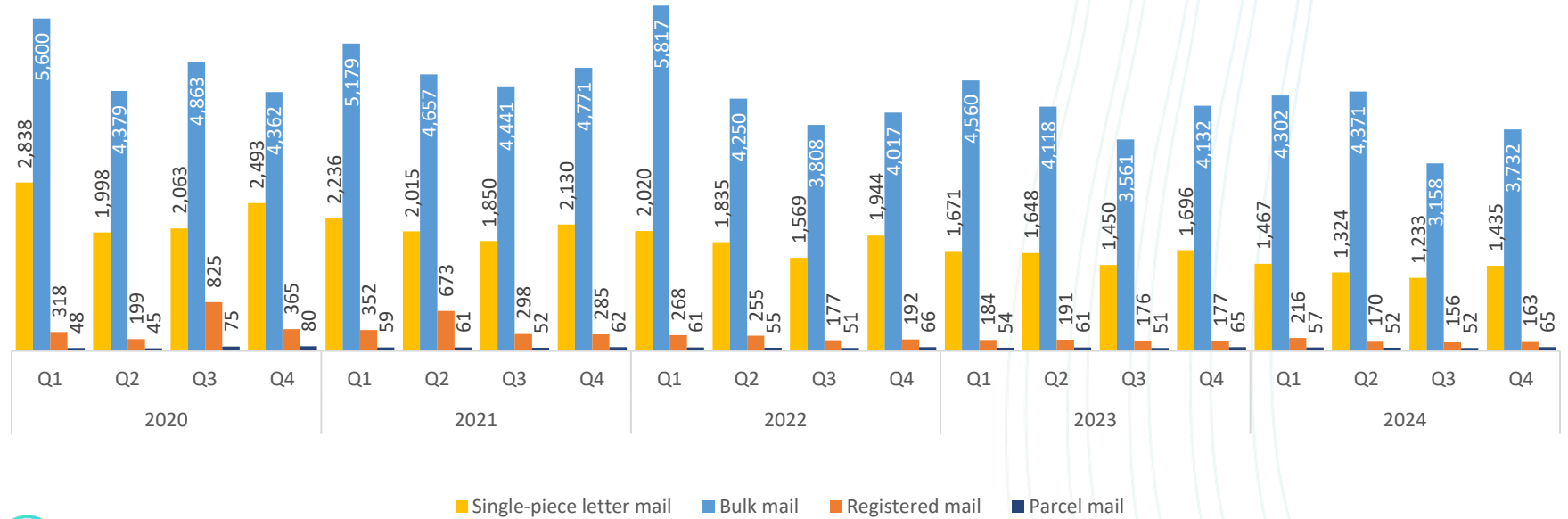
# Post – mail volumes (1)

Postal mail volumes (in 000's)



# Post – mail volumes (2)

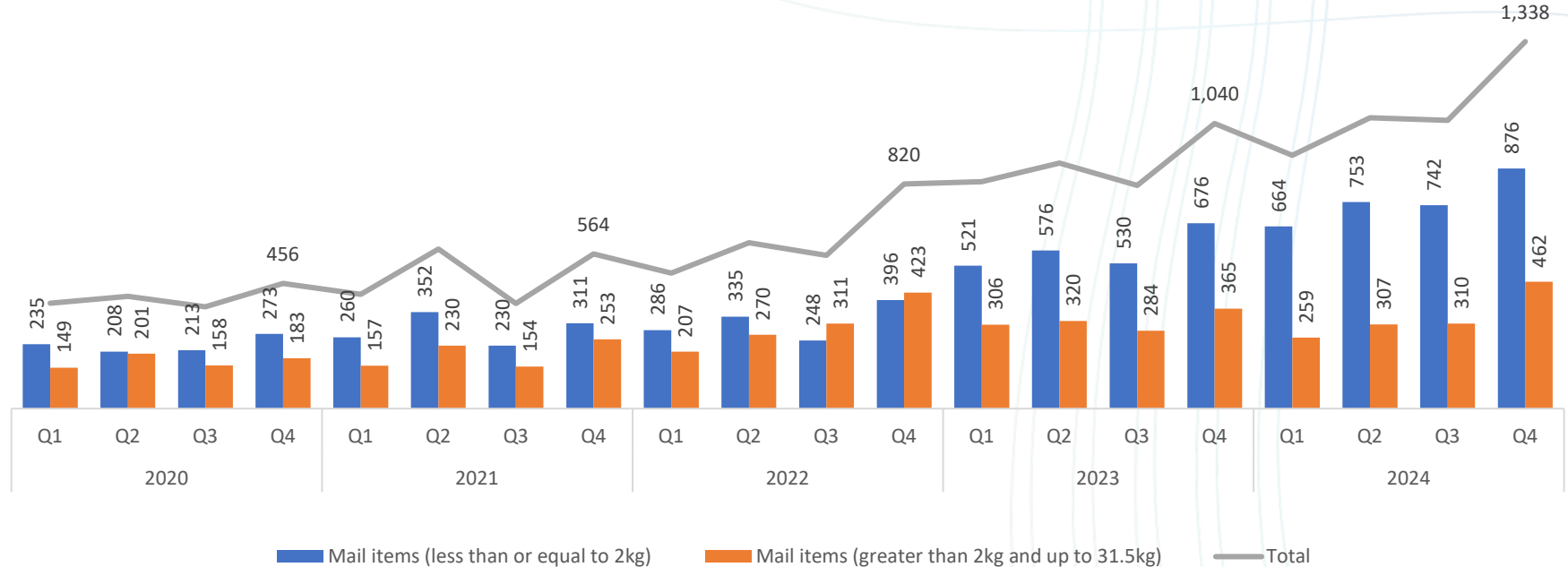
Within the scope of the universal service (in 000's)



■ Single-piece letter mail ■ Bulk mail ■ Registered mail ■ Parcel mail

# Post – mail volumes (3)

Outside the scope of the universal service (in 000's)



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