

Digital Terrestrial Television (DTT) and the long-term future use of the sub-700 MHz radio spectrum band



Purpose

The purpose of this information notice is to **inform ComReg's planning** to ensure the efficient use of the valuable radio spectrum resource and to **assist stakeholder discussions on the future role of Digital Terrestrial Television (DTT) and free-to-air television broadcasting** (FM radio is not within scope of this report) in Ireland more generally.

Introduction

This Information Notice provides information on:

- TV viewing trends and DTT in Ireland (i.e. the Saorview TV platform of Raidió Teilifís Éireann (RTÉ) and the DTT network operated by 2rn); and
- the radio spectrum used by DTT (the Sub-700 MHz band) and its potential future uses.

This information Notice is based on a report from Frontier Economics (ComReg 26/69a).

RTÉ's DTT Saorview

- Provides 98% coverage
- Free-to-air with no subscription needed
- Resilient and secure network able to operate in emergency situations.
- Use radio spectrum in 470 to 694 MHz frequency range ("Sub-700 MHz band")



DTT (% households)

98%
DTT
Coverage

33%
DTT:
can access

13%
DTT:
Primary
TV Service

7%
DTT:
Sole
TV Service

3%
DTT:
Sole TV Service
& no broadband

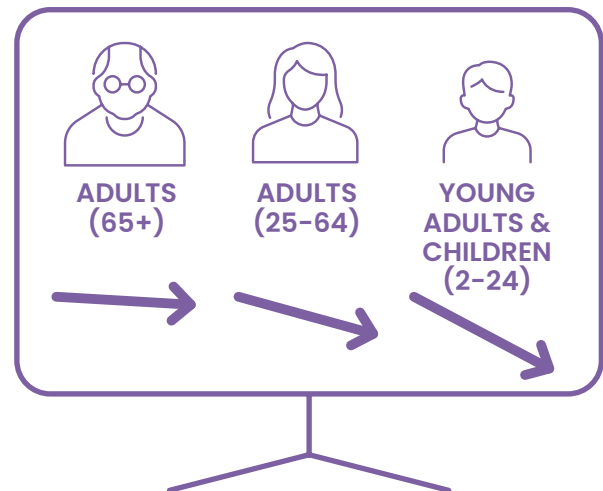
TV viewing is falling and shifting online

Over the last decade, the average amount of time the average Irish adult (15+ years) spends watching TV each day has fallen from 193 mins in 2017 to 140 mins in 2025.

27% decline

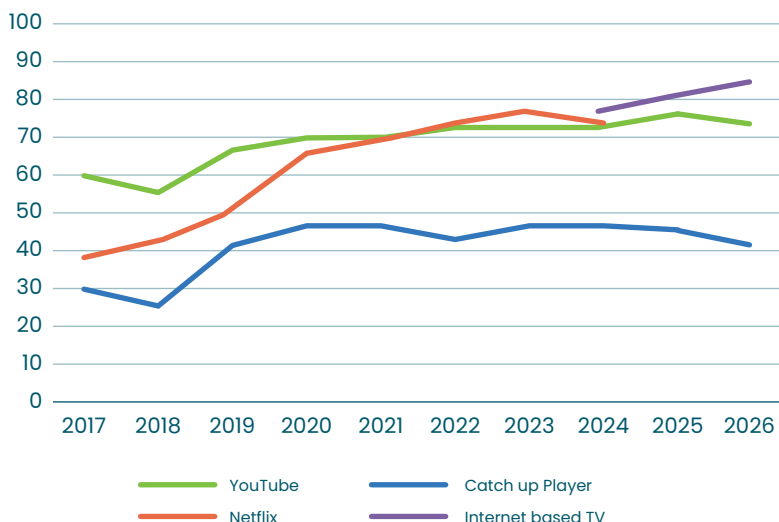


- Younger audiences watch significantly less TV than other age groups (UK **80%** fewer minutes in 2024), and this has declined substantially (UK falling **70%** from 2018 to 2024)
- TV Viewing among the elderly (65+) has held steady.



Use of Internet-based TV and VOD is increasing

Trends in VOD and TV reception method statistics



Between **35-45%** of viewing of live TV (2024-2025) of some of the largest Irish live TV shows were streamed live on the RTÉ Player.

**RTÉ
PLAYER**



YouTube **NETFLIX**

Source: VOD usage - B&A Techscape "Which of these do you do nowadays anywhere?"; Web TV usage - TAM establishment survey; VOD usage - B&A Techscape "Which of these do you do nowadays anywhere? (on primary TV and other devices); Web TV usage - TAM establishment survey (on primary TV)

Broadcasters are investing in online services to reach more and younger viewers and strengthen advertising revenues

IRELAND:

RTÉ's new Digital Strategy, 2025-2029 - accelerate digital transformation of RTÉ

PSBs have online players available

UK:

Freely app jointly created by the four UK PSBs (BBC, ITV, Channel 4 and Channel 5)

TG 4

Player

OIREACHTAS TV

**RTÉ
PLAYER**

Freely

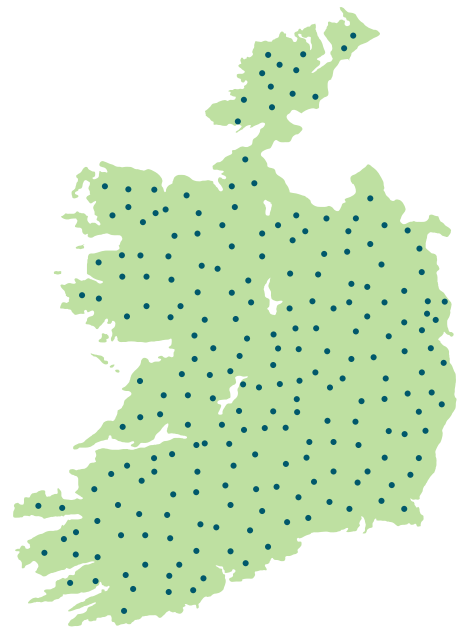
Ireland's gigabit broadband access enables internet-based TV services

Internet-based TV services provide greater capacity, functionality and higher definition services than DTT services.

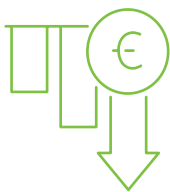
By 2028, Ireland will be one of the first European countries to have 100% gigabit broadband access.



Gigabit coverage of all premises in Ireland
(Q1 2026, measured in Eircodes)



100% gigabit broadband access reduces Ireland's reliance on DTT and provides opportunities:



Reduced network costs
if no need to run two
state networks



Unlocking valuable sub-700 MHz spectrum
released for other uses
(e.g. improving mobile coverage)

Post-2030 international decisions on DTT and use of sub-700 MHz band are expected

- In Europe, the future use of sub-700 MHz band is being considered by the Radio Spectrum Policy Group (RSPG)
- In the UK, the future of DTT is being considered by the UK Government with advice from the UK regulator (Ofcom).



Long-term future uses of the sub-700 MHz band

Noting changing trends in viewing habits and distribution conditions, it is likely the use of sub-700 MHz band will change post 2030

Scenario 1: The 'status quo' or 'baseline' scenario

CURRENT USE:
- DTT ONLY
(and PMSE)

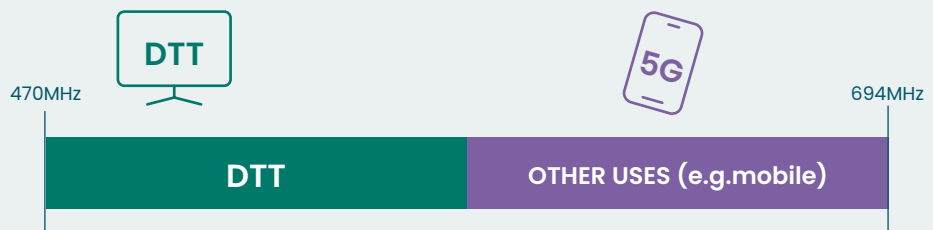


Scenario 1 is the baseline scenario

DTT continues to use the full sub-700 MHz band but some time post-2030 the use of the sub-700 MHz band is likely to change.

Scenario 2: The 'partial release' scenario

SHARED USE:
- DTT (and PMSE)
- OTHER USE



Scenario 2 involves a DTT migration project

The last DTT migration project released the 700 MHz band:

- It took 7 years (2013 to 2020) and involved many stages starting with international negotiations with UK and France; and
- It involved State compensation of €8.1m (in 2020 prices) to 2m for the incremental costs incurred.

Scenario 3: The 'full release' scenario

FULL RELEASE
- OTHER USES
(and PMSE)



Scenario 3 involves a decommissioning DTT project

- DTT households would need to migrate to an alternative TV platform.
- Currently 7% of households rely solely on DTT for their TV services and 3% of households are DTT only households with no broadband.
- Over time these numbers would be expected to decrease.

The switch-off of Analogue TV in October 2012 is an example of a previous TV decommissioning project.

Key Findings

Television consumption is increasingly moving online, supported by expanding gigabit broadband availability and growing use of internet-based TV and streaming services.

While DTT remains important in the short to medium term, its long-term role and its future use of the sub-700 MHz spectrum band will need to be considered in light of changing consumer behaviour, technological developments, and international policy decisions, particularly from Ireland's neighbouring countries the UK and France.

Frontier Economics Recommendations

Post-2030 changes likely to DTT and use of sub-700 MHz band



Plan how Public Service Media (PSM) would be delivered if DTT is reduced or switched off.

Challenge: Ensure TV services maintains PSM prominence and universal access.

7% of TV households rely solely on DTT

3% of TV households rely solely on DTT and have no broadband



Reduce market uncertainty through information and consultation.

Challenge: Mitigate market uncertainty particularly in relation to future DTT Saorview investment decisions.

Investment by 2rn in certain long-term assets mid-2030 onwards.



Review legislation and spectrum rules to ensure flexibility.

Challenge: Enable greater flexibility in Sub-700 MHz spectrum use and PSM delivery across evolving platforms.

Spectrum reserved for **6** DTT multiplexes but only **2** used.

ComReg's Next Steps

ComReg will continue to monitor and contribute to European and international discussions on the future use of the sub-700 MHz band.

ComReg will continue to provide advice to Government and other stakeholders to assist their considerations of the future of DTT, and its spectrum requirements.



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation