
Office of Utilities Regulation

Telecommunications Market Information Report

April - June 2020



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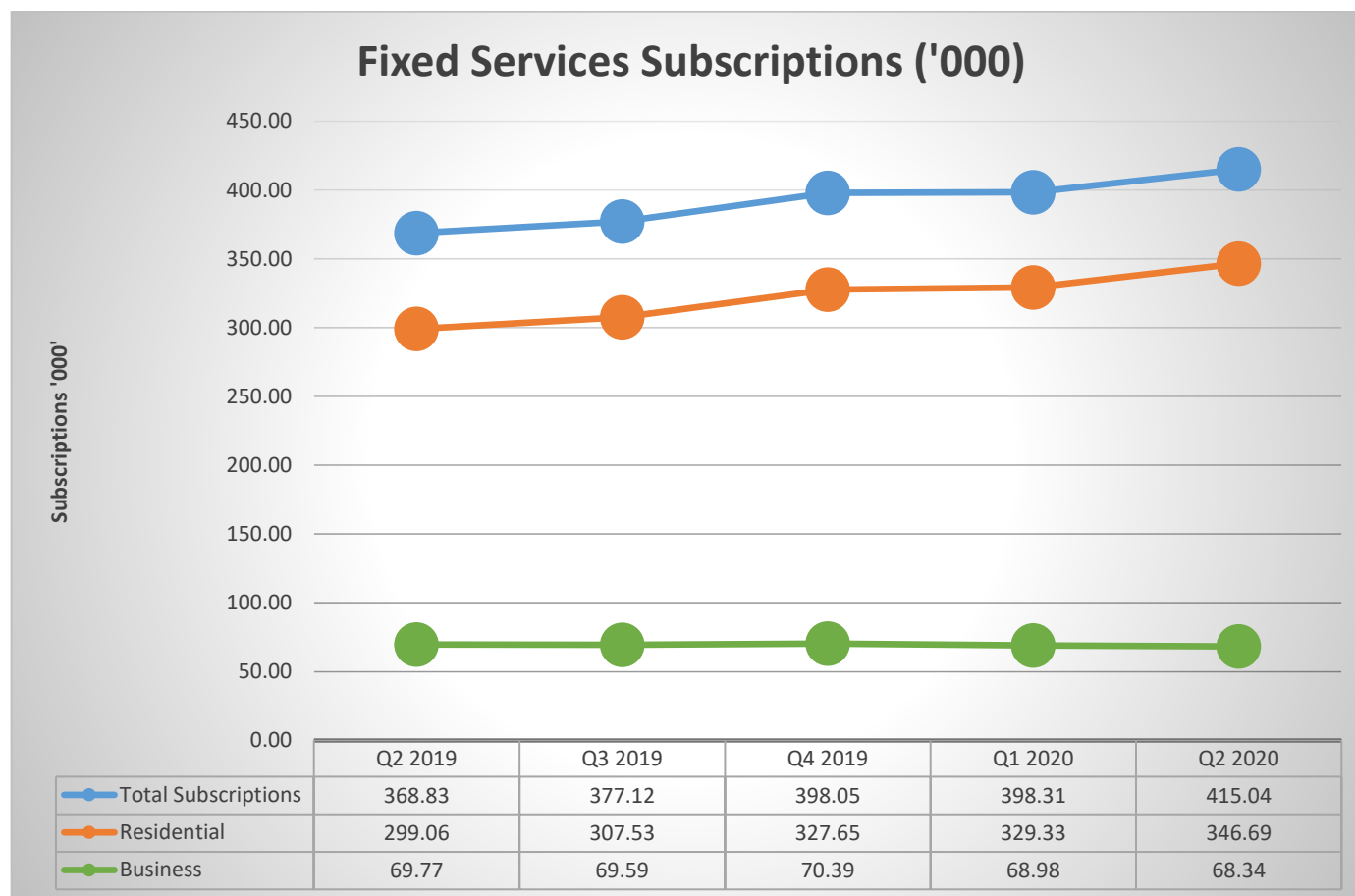
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Fixed Market Data

Figure 1: Fixed Services Subscriptions



% Change: Q2 '20/ Q1 '20

Total Subscriptions:	4.20%
Residential:	5.27%
Business:	- 0.92 %

Figure 2: Fixed Call Minutes

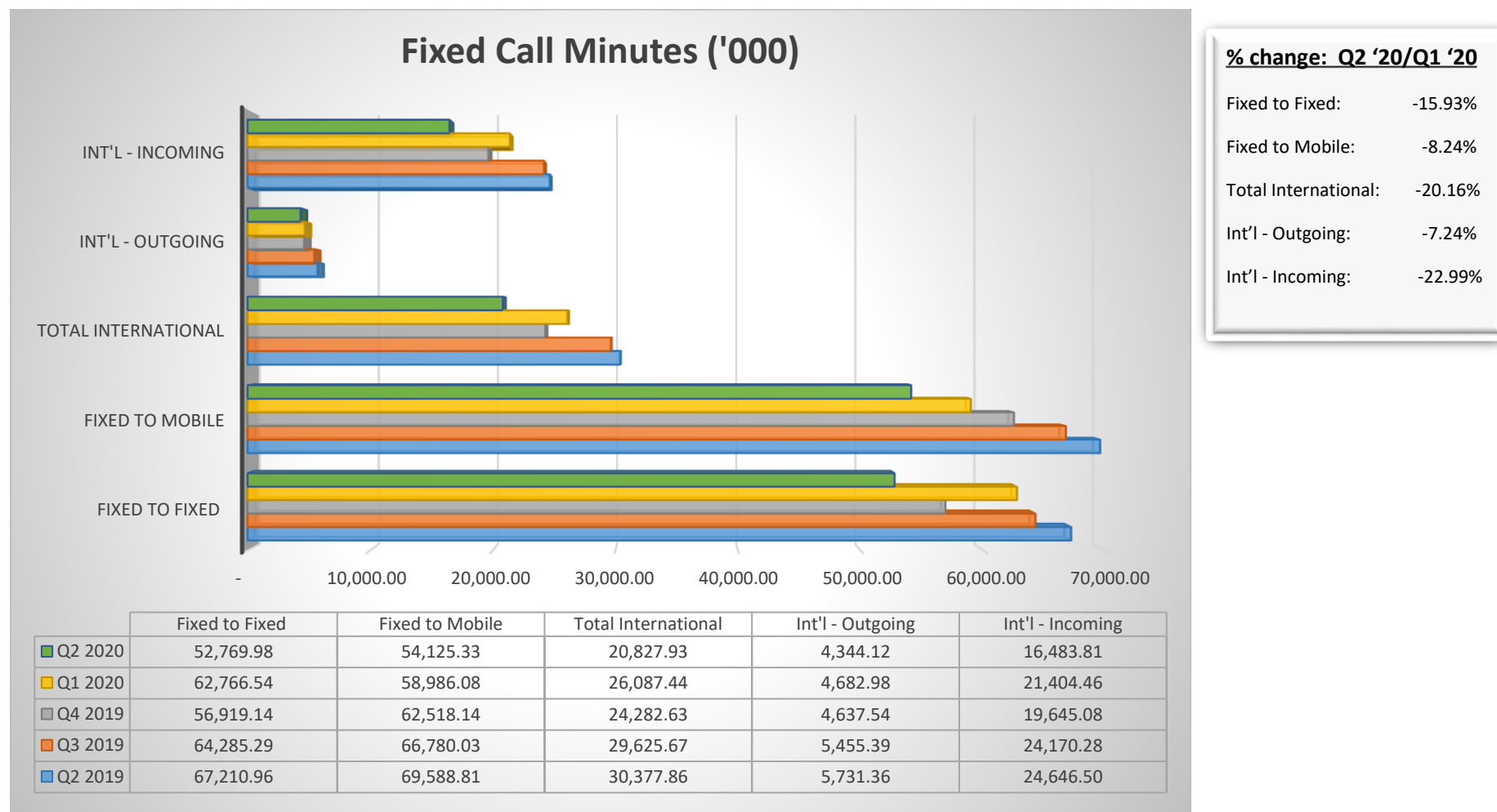
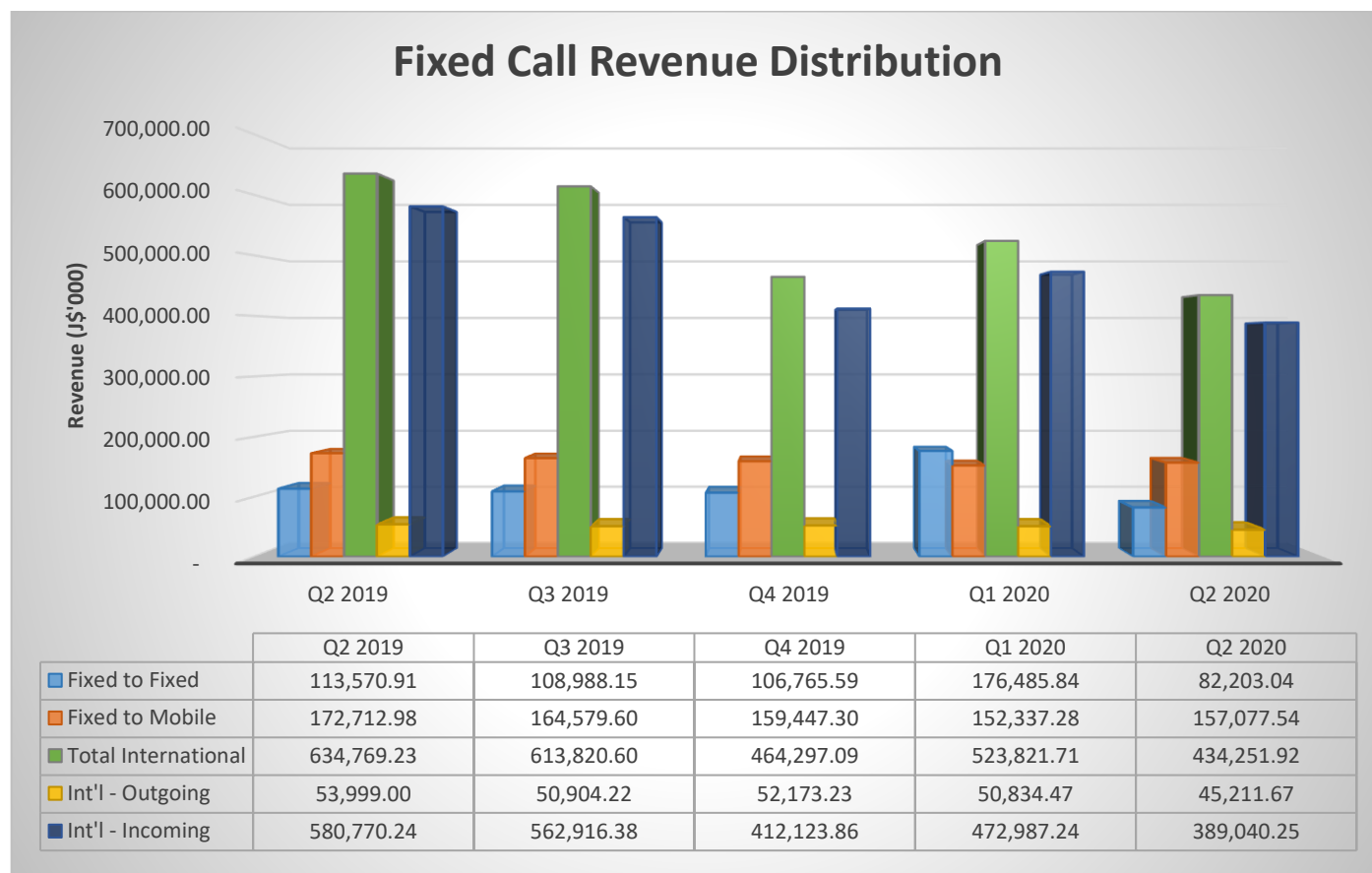


Figure 3: Fixed Call Revenue Distribution*

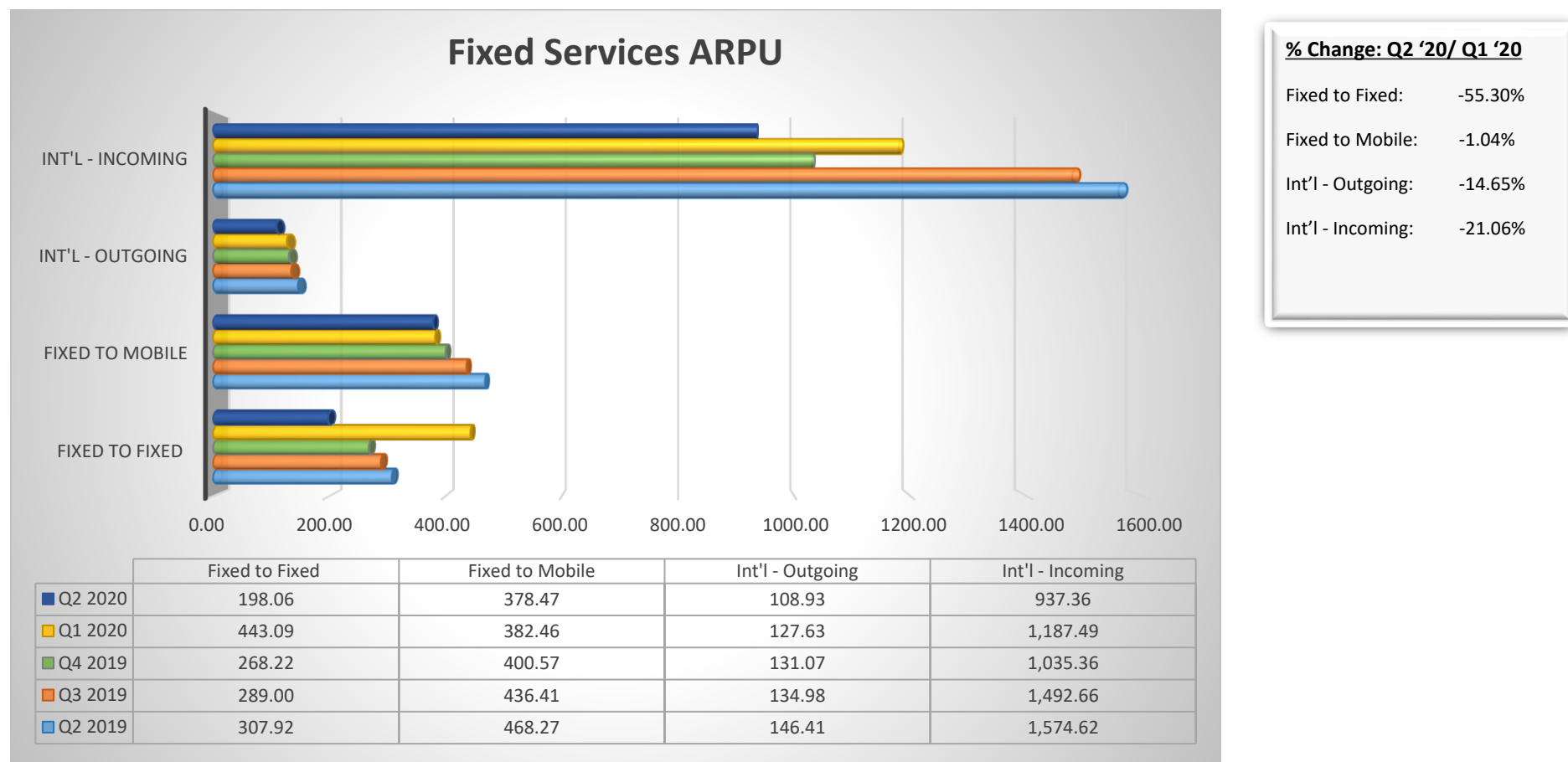


% change Q2 '20/ Q1 '20

Fixed to Fixed:	-53.42%
Fixed to Mobile:	3.11%
Total International:	-17.10%
Int'l - Outgoing:	-11.06%
Int'l - Incoming:	-17.75%

* The significant decrease recorded for revenues arising from “fixed to fixed” calls in the Q2 2020 quarter was due to adjustments that were done by one operator to figures previously reported for Q1 2020.

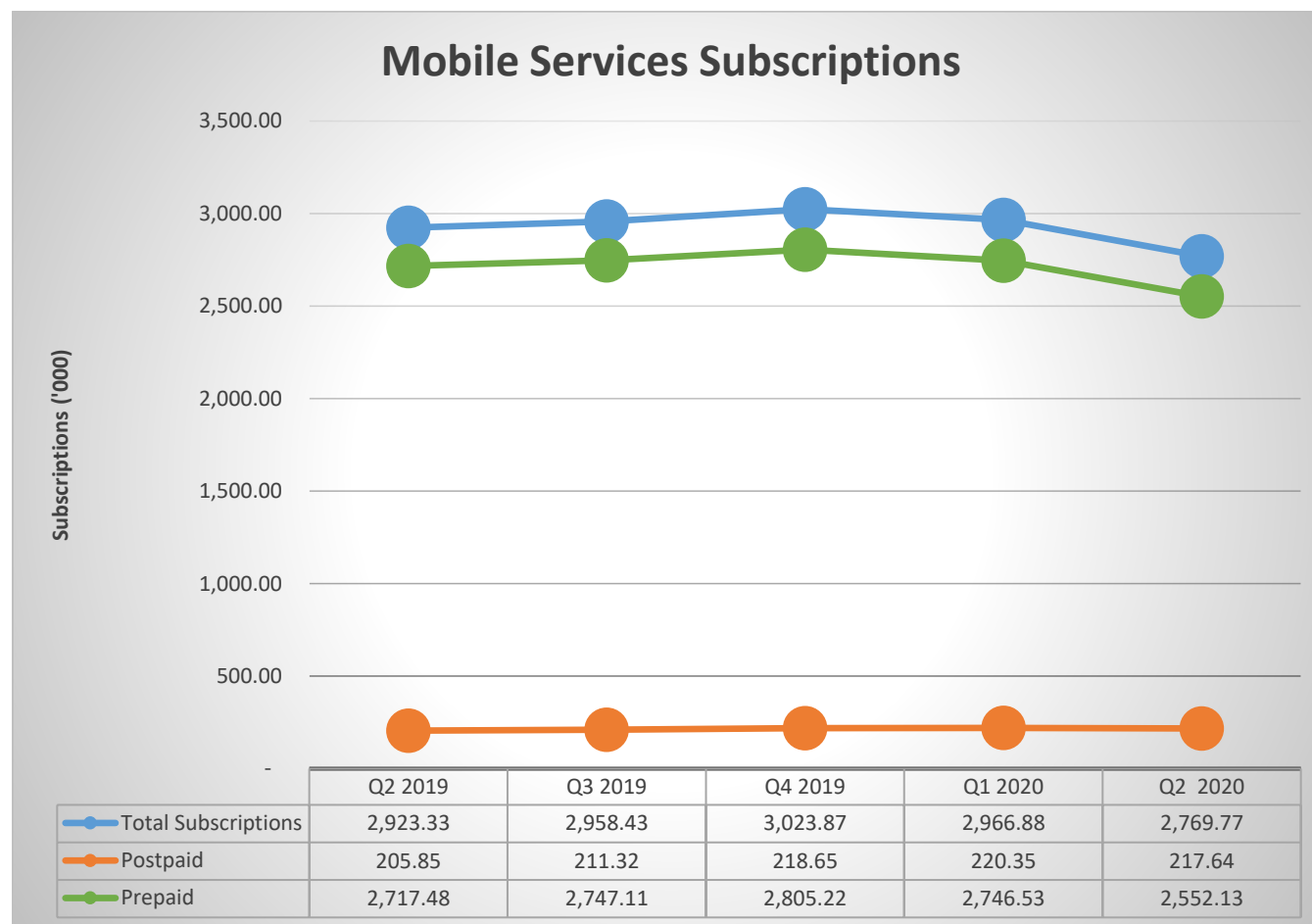
Figure 4: Fixed Services Average Revenue per User (ARPU)*



* The significant decrease recorded for revenues arising from “fixed to fixed” calls in the Q2 2020 quarter was due to adjustments that were done by one operator to figures previously reported for Q1 2020.

Mobile Market Data

Figure 5: Mobile Services Subscriptions



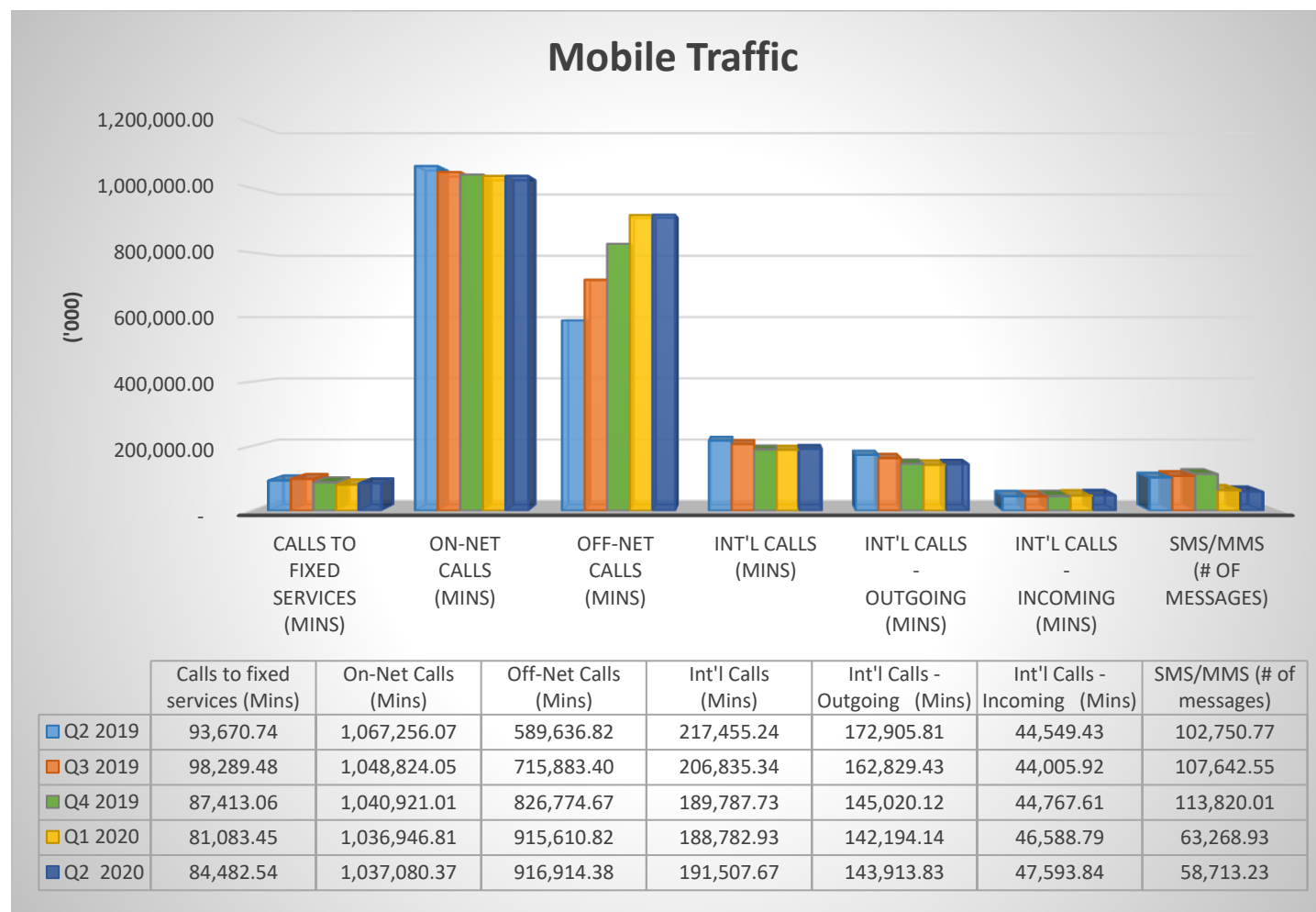
% Change: Q2 '20/ Q1 '20

Total Subscriptions: - 6.64%

Postpaid: - 1.23%

Prepaid: - 7.08%

Figure 6: Mobile Minutes



% Change: Q2 '20/ Q1 '20

Calls to fixed services:	4.19%
On-Net Calls:	0.01%
Off-Net Calls:	0.14%
Int'l Calls:	1.44%
Int'l Calls – Outgoing:	1.21%
Int'l Calls – Incoming:	2.16%
SMS/MMS:	7.20%

Figure 7: Mobile Services Revenue Distribution

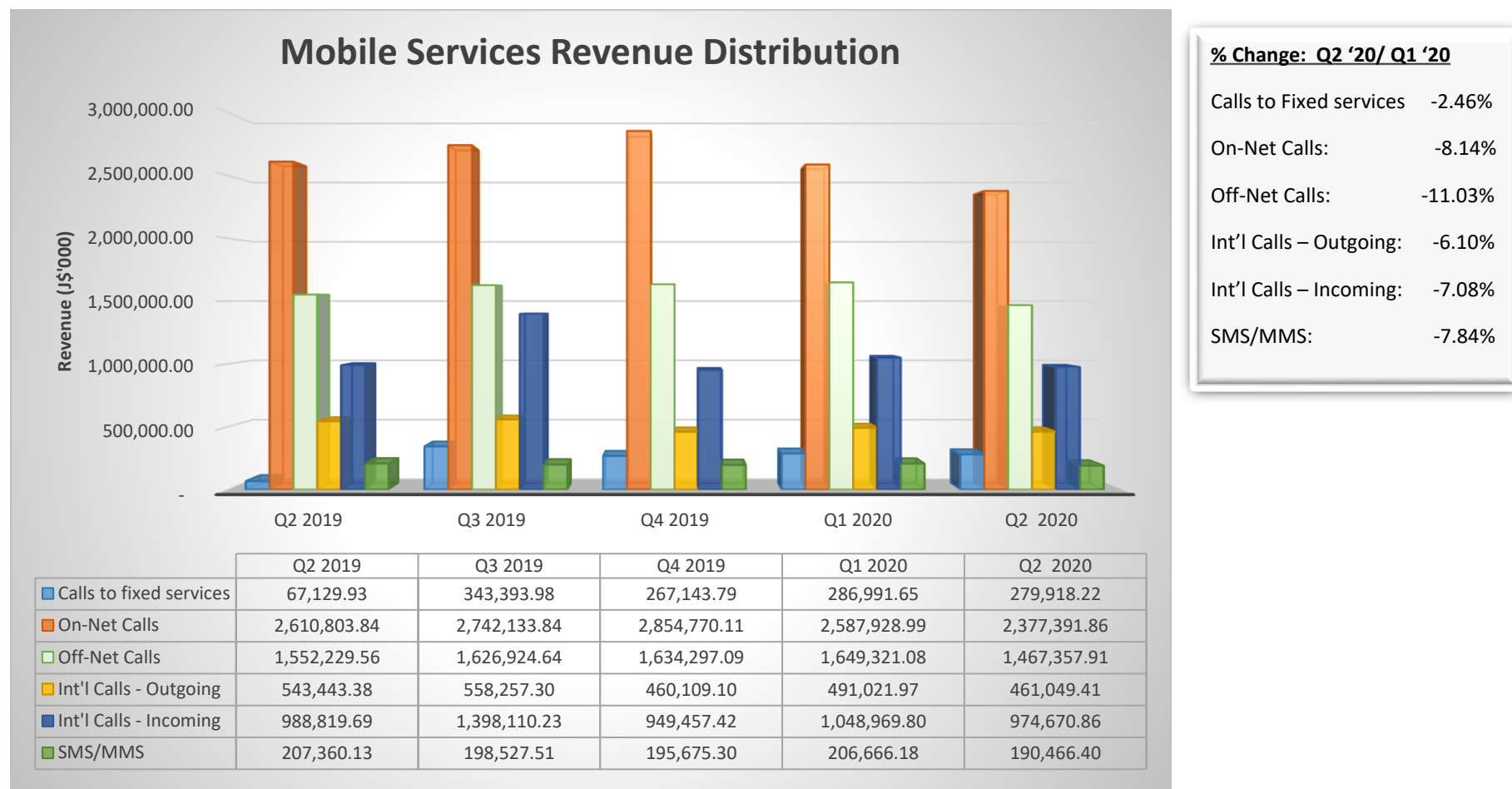
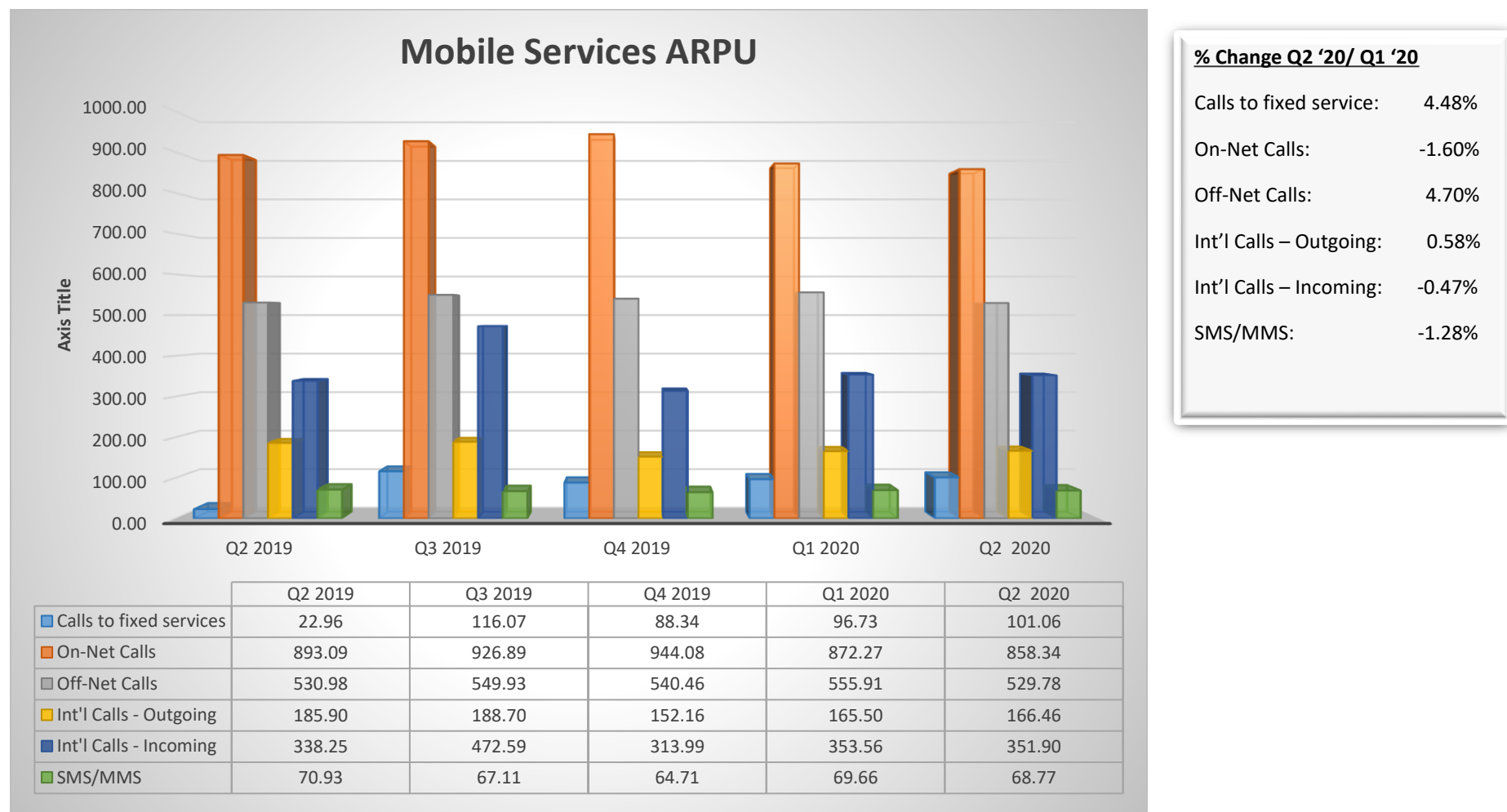
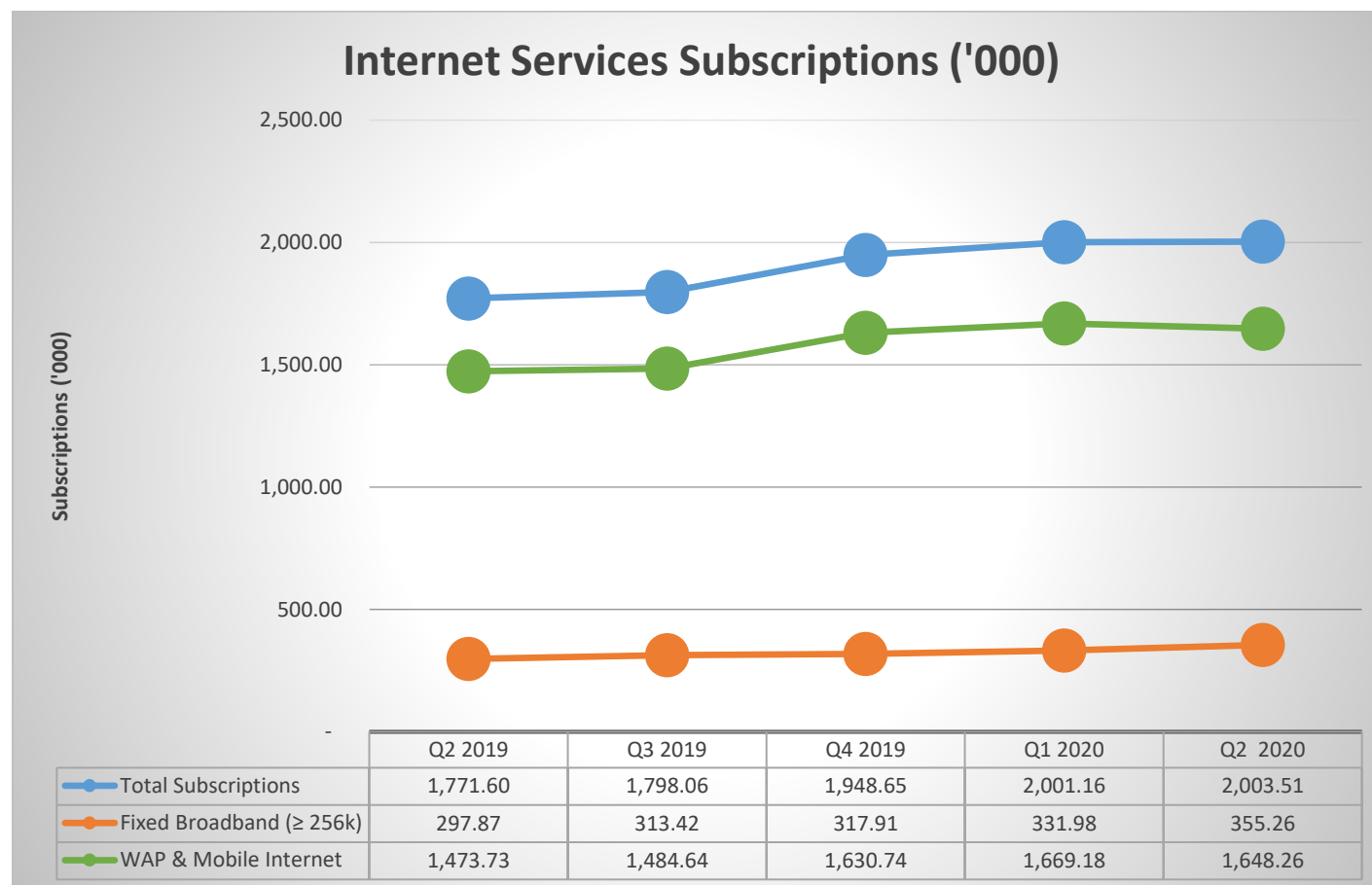


Figure 8: Mobile Services Average Revenue per User (ARPU)



Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q2 '20/ Q1 '20	
Total Subscriptions:	0.12%
Fixed Broadband (≥ 256k):	7.01%
WAP & Mobile Internet:	-1.25%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Fixed Subscription Penetration Rate	13.5%	13.8%	14.6%	14.6%	15.2%
Mobile Subscription Penetration Rate	107.1%	108.4%	110.8%	108.5%	101.3%
Fixed Broadband Subscription Penetration Rate	10.9%	11.5%	11.7%	12.1%	13.0%
Mobile Broadband Subscription Penetration Rate	54.0%	54.4%	59.8%	61.1%	60.3%
Total Broadband Subscription Penetration Rate	64.9%	65.9%	71.4%	73.2%	73.3%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Fixed HHI	4,704	4,566	4,633	4,725	4,673
Mobile HHI	5,307	5,289	5,234	5,204	5,150
Fixed Broadband HHI	3,629	3,677	3,642	3,673	3,704
Mobile Broadband HHI	5,431	5,308	5,258	5,311	5,435

¹ Calculated using population year-end 2019 data from the Statistical Institute of Jamaica: 2,734,092.

² Calculated using subscription data.

Appendix

Fixed Market	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	% Change Q2 '20/Q1 '20	% Change Q2 '20/Q2 '19
Total Subscriptions ('000)	368.83	377.12	398.05	398.31	415.04	4.20	12.53
Fixed to Fixed ('000 minutes)	67,210.96	64,285.29	56,919.14	62,766.54	52,769.98	-15.93	-21.49
Fixed to Mobile Calls ('000 minutes)	69,588.81	66,780.03	62,518.14	58,986.08	54,125.33	-8.24	-22.22
Total International Calls ('000 minutes)	30,377.86	29,625.67	24,282.63	26,087.44	20,827.93	-20.16	-31.44
Outgoing International Calls ('000 minutes)	5,731.36	5,455.39	4,637.54	4,682.98	4,344.12	-7.24	-24.20
Incoming International Calls ('000 minutes)	24,646.50	24,170.28	19,645.08	21,404.46	16,483.81	-22.99	-33.12
Total Revenue (J\$ ' million)	2,456.28	2,466.45	2,429.86	2,490.16	2,341.85	-5.96	-4.66

Mobile Market	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	% Change Q2 '20/Q1 '20	% Change Q2 '20/Q2 '19
Total Subscriptions ('000)	2,923.33	2,958.43	3,023.87	2,966.88	2,769.77	-6.64	-5.25
Calls to Fixed Services	93670.74383	98,289.48	87,413.06	81,083.45	84,482.54	4.19	-9.81
On-Net Calls ('000 minutes)	1,067,256.07	1,048,824.05	1,040,921.01	1,036,946.81	1,037,080.37	0.01	-2.83
Off-Net Calls ('000 minutes)	589,636.82	715,883.40	826,774.67	915,610.82	916,914.38	0.14	55.50
International calls	217,455.24	206,835.34	189,787.73	188,782.93	191,507.67	1.44	-11.93
Outgoing International ('000 minutes)	172,905.81	162,829.43	145,020.12	142,194.14	143,913.83	1.21	-16.77
Incoming International ('000 minutes)	44,549.43	44,005.92	44,767.61	46,588.79	47,593.84	2.16	6.83
SMS/MMS traffic ('000 # of messages)	102,750.77	107,642.55	113,820.01	63,268.93	58,713.23	-7.20	-42.86
Total Revenue (J\$ ' million)	11,668.77	13,873.45	14,490.68	13,023.50	12,110.46	-7.01	3.79

Internet Market	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	% Change Q2 '20/Q1 '20	% Change Q2 '20/Q2 '19
Total Subscriptions ('000)	1,771.60	1,798.06	1,948.65	2,001.16	2,003.51	0.12	13.09
Fixed Broadband (≥256K)	297.87	313.42	317.91	331.98	355.26	7.01	19.27
WAP & Mobile Internet	1,473.73	1,484.64	1,630.74	1,669.18	1,648.26	-1.25	11.84
Total Revenue (J\$ ' million)	7,980.86	9,352.85	10,434.84	9,117.43	9,274.19	1.72	16.21

Penetration Rate	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
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