
Office of Utilities Regulation

Telecommunications Market Information Report January – March 2020



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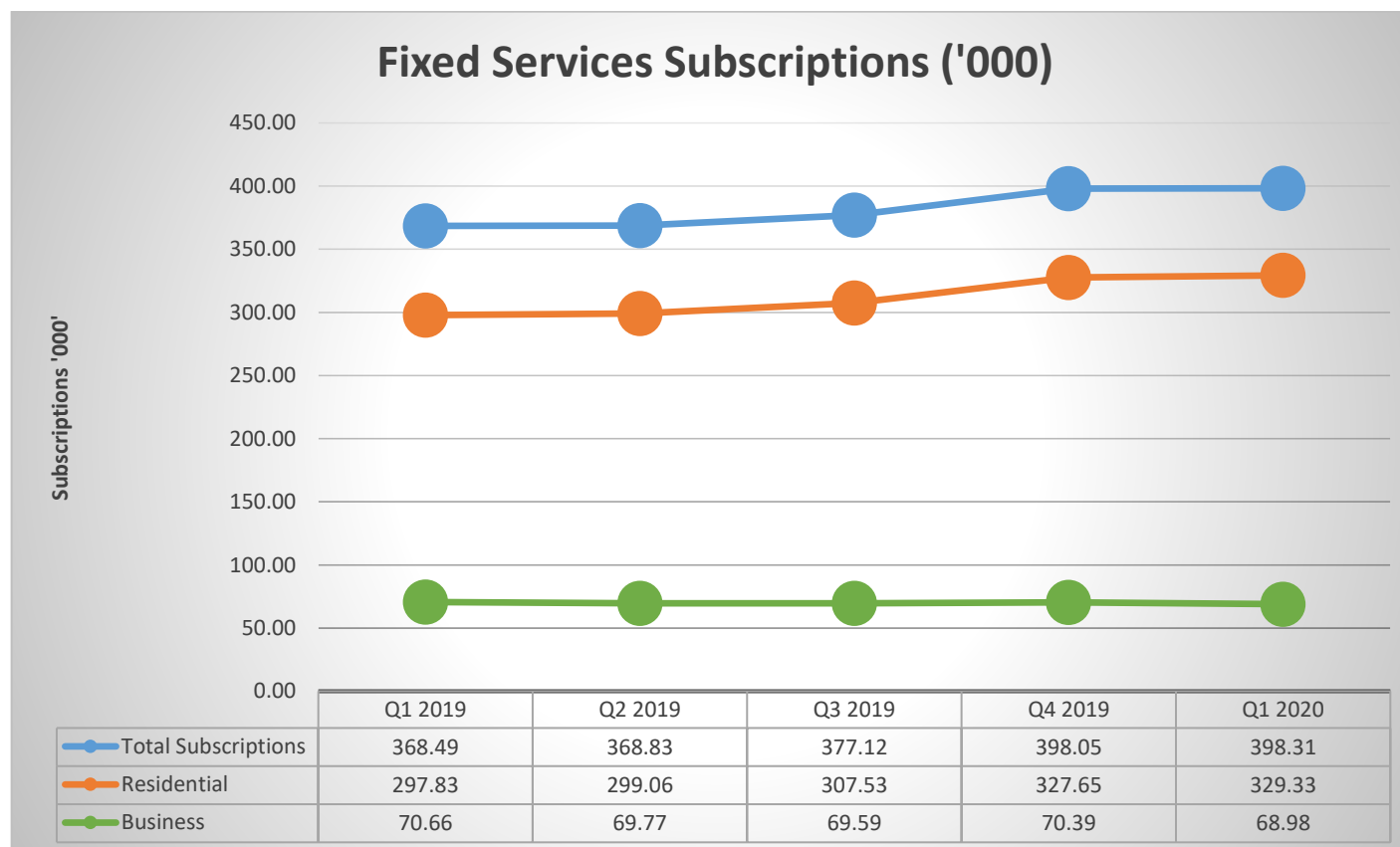
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Fixed Market Data

Figure 1: Fixed Services Subscriptions



% Change: Q1 '20/ Q4 '19

Total Subscriptions:	0.07%
Residential:	0.51%
Business:	-2.01 %

Figure 2: Fixed Call Minutes

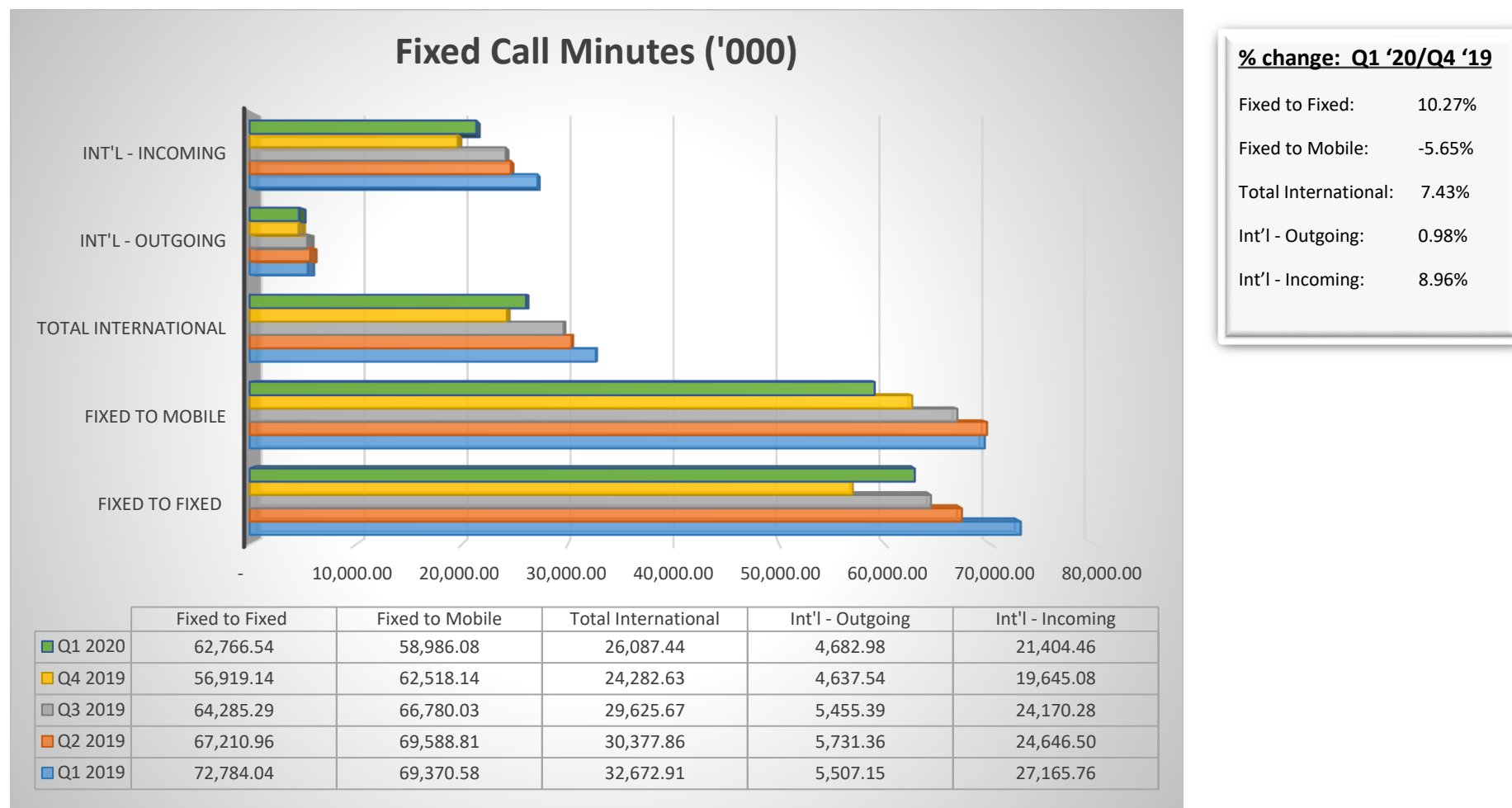
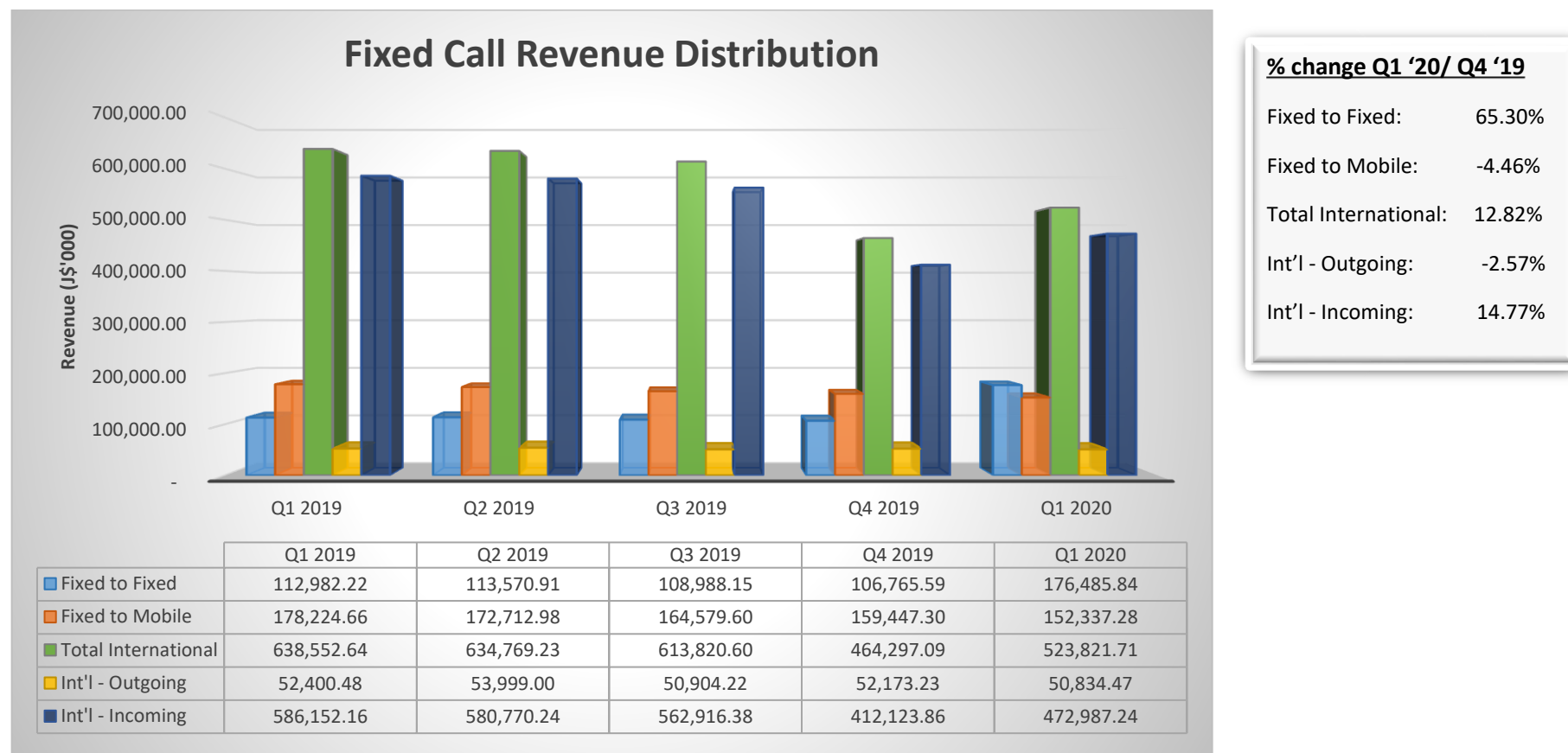
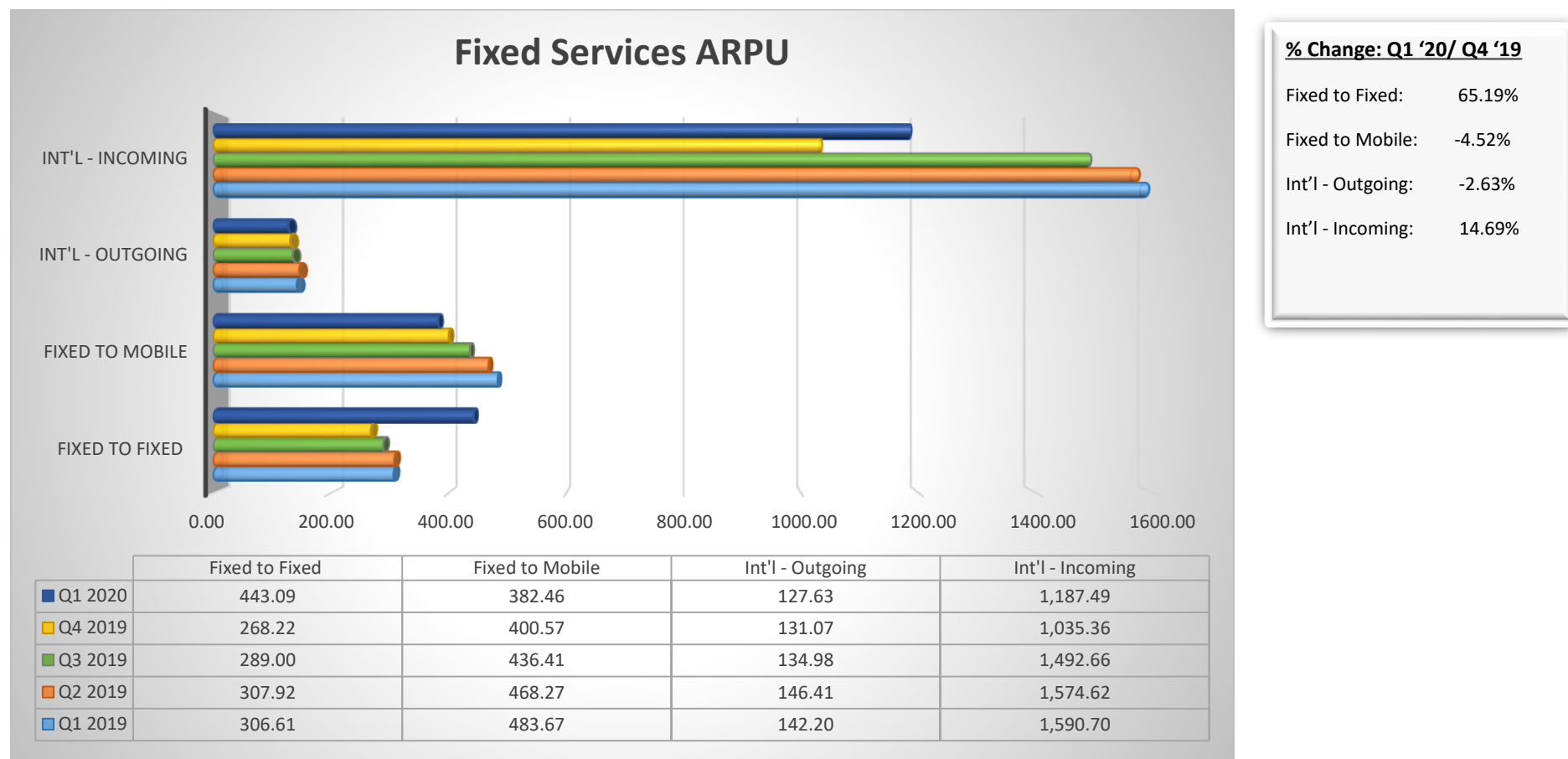


Figure 3: Fixed Call Revenue Distribution*



* The significant increase recorded for revenues arising from “fixed to fixed” calls in the Q1 2020 quarter was due to adjustments that were done by one operator to figures previously reported for Q4 2019.

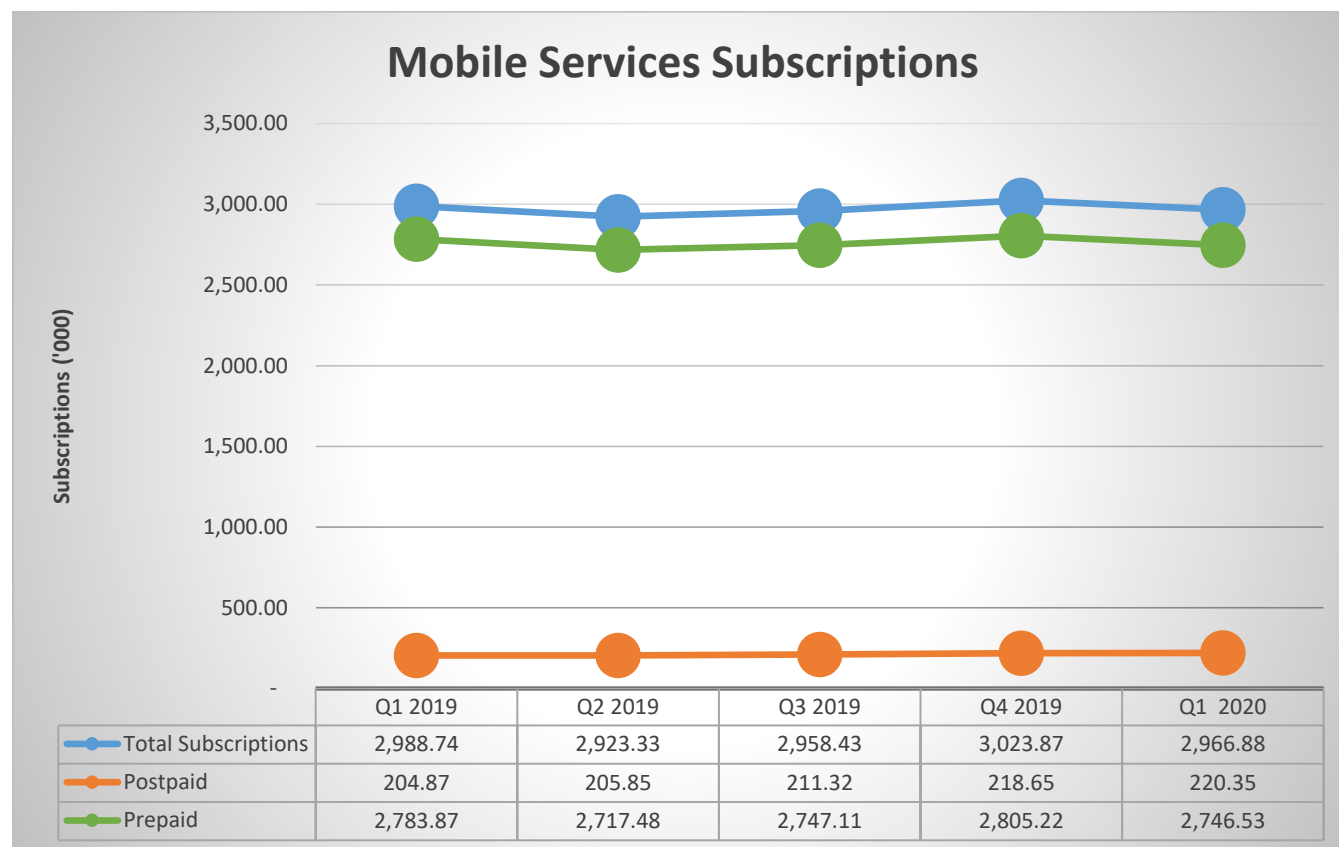
Figure 4: Fixed Services Average Revenue per User (ARPU)*



* The significant increase recorded for revenues arising from “fixed to fixed” calls in the Q1 2020 quarter was due to adjustments that were done by one operator to figures previously reported for Q4 2019.

Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q1 '20/ Q4 '19

Total Subscriptions: -1.88%

Postpaid: 0.78%

Prepaid: -2.09%

Figure 6: Mobile Minutes

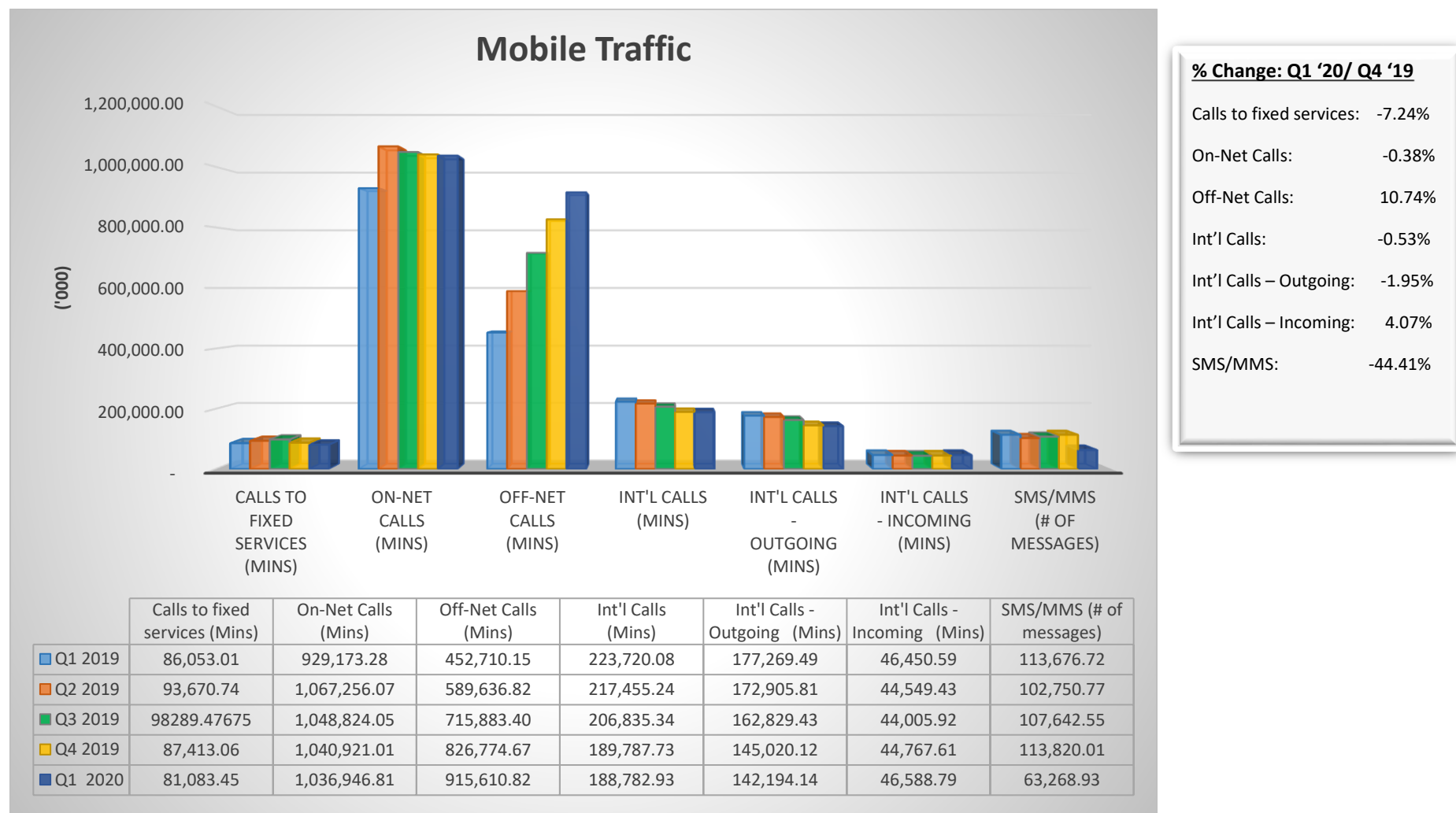


Figure 7: Mobile Services Revenue Distribution

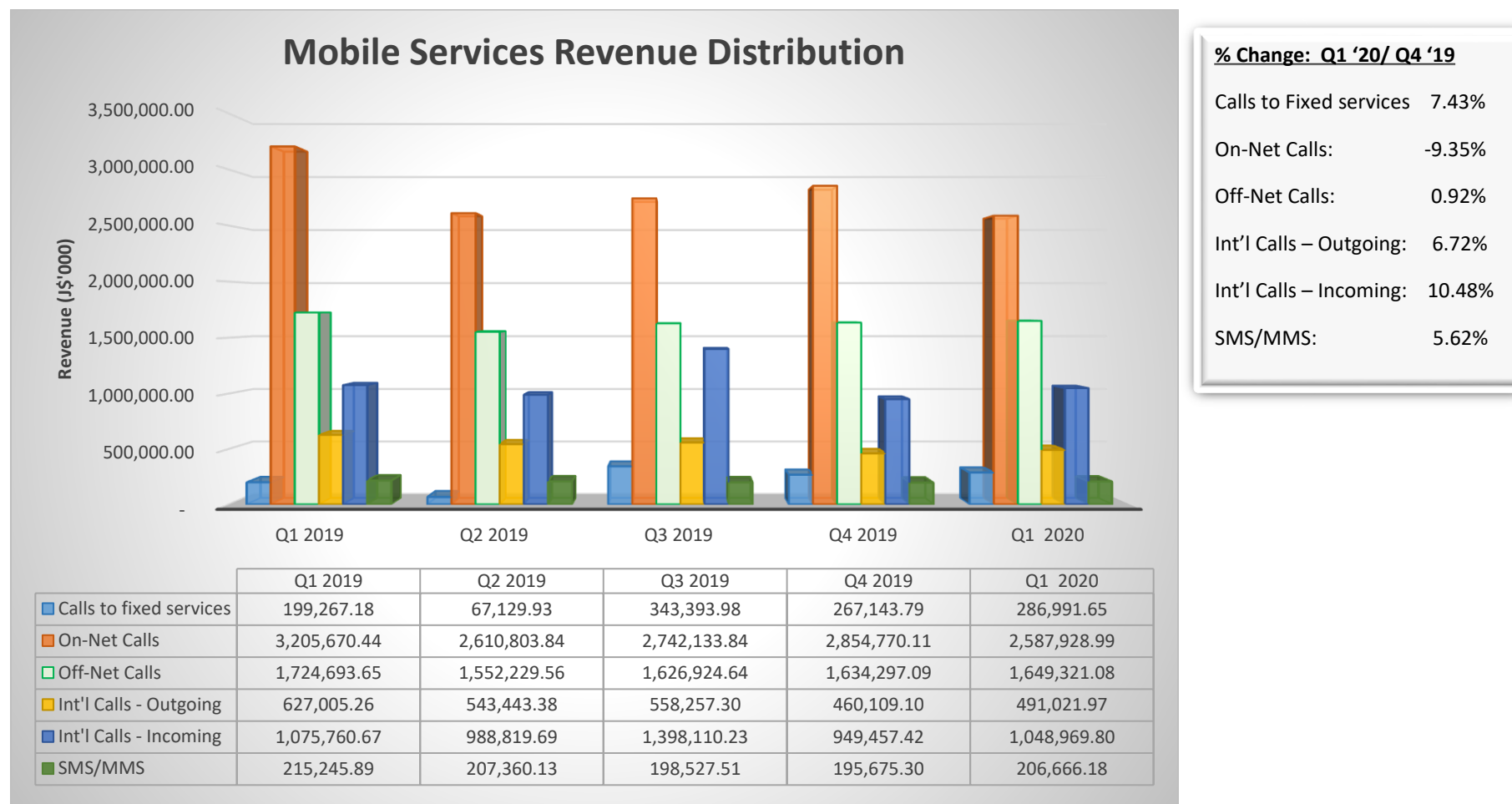
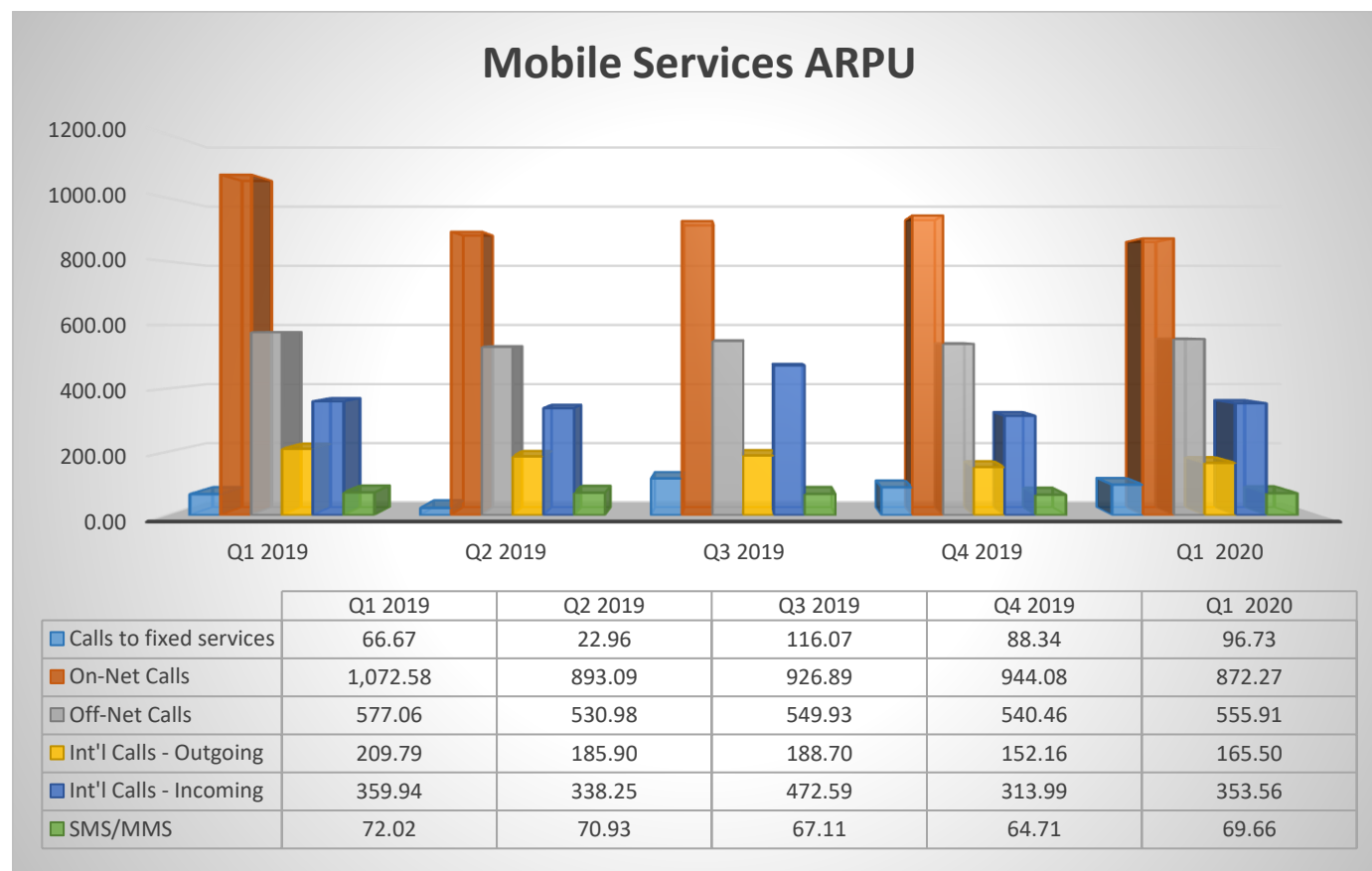


Figure 8: Mobile Services Average Revenue per User (ARPU)

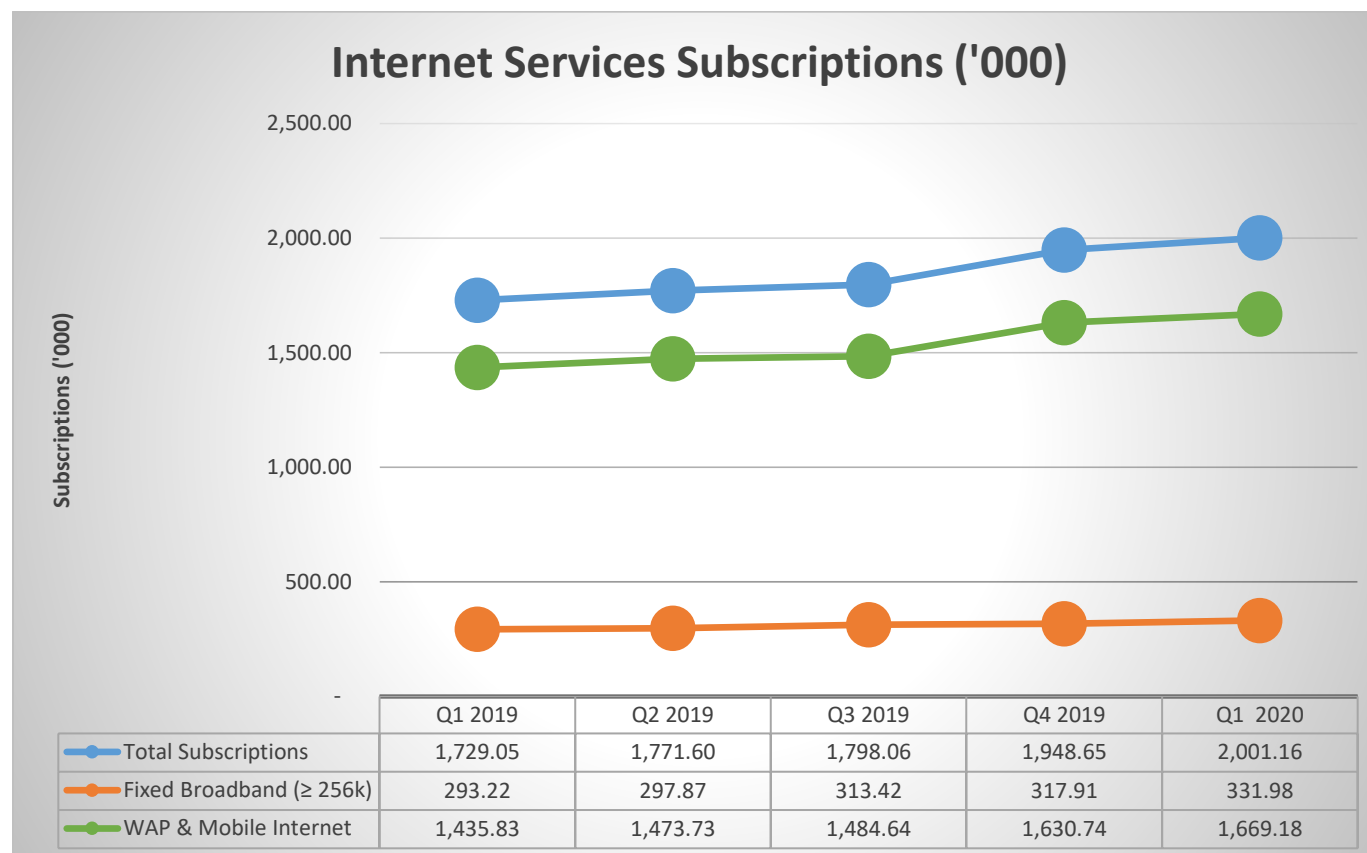


% Change Q1 '20/ Q4 '19

Calls to fixed service:	9.49%
On-Net Calls:	-7.61%
Off-Net Calls:	2.86%
Int'l Calls – Outgoing:	8.77%
Int'l Calls – Incoming:	12.60%
SMS/MMS:	7.65%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q1 '20/ Q4 '19	
Total Subscriptions:	2.69%
Fixed Broadband (≥ 256k):	4.43%
WAP & Mobile Internet:	2.36%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020
Fixed Subscription Penetration Rate	13.5%	13.5%	13.8%	14.6%	14.6%
Mobile Subscription Penetration Rate	109.5%	107.1%	108.4%	110.8%	108.5%
Fixed Broadband Subscription Penetration Rate	10.7%	10.9%	11.5%	11.7%	12.1%
Mobile Broadband Subscription Penetration Rate	52.6%	54.0%	54.4%	59.8%	61.1%
Total Broadband Subscription Penetration Rate	63.4%	64.9%	65.9%	71.4%	73.2%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020
Fixed HHI	4,738	4,704	4,566	4,633	4,725
Mobile HHI	5,501	5,307	5,289	5,234	5,204
Fixed Broadband HHI	3,611	3,629	3,677	3,642	3,673
Mobile Broadband HHI	5,713	5,431	5,308	5,258	5,311

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	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	% Change Q1 '20/Q4 '19	% Change Q1 '20/Q1 '19
Total Subscriptions ('000)	368.49	368.83	377.12	398.05	398.31	0.07	8.09
Fixed to Fixed ('000 minutes)	72,784.04	67,210.96	64,285.29	56,919.14	62,766.54	10.27	-13.76
Fixed to Mobile Calls ('000 minutes)	69,370.58	69,588.81	66,780.03	62,518.14	58,986.08	-5.65	-14.97
Total International Calls ('000 minutes)	32,672.91	30,377.86	29,625.67	24,282.63	26,087.44	7.43	-20.16
Outgoing International Calls ('000 minutes)	5,507.15	5,731.36	5,455.39	4,637.54	4,682.98	0.98	-14.97
Incoming International Calls ('000 minutes)	27,165.76	24,646.50	24,170.28	19,645.08	21,404.46	8.96	-21.21
Total Revenue (J\$' million)	2,054.20	2,456.28	2,466.45	2,429.86	2,490.16	2.48	21.22

Mobile Market	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	% Change Q1 '20/Q4 '19	% Change Q1 '20/Q1 '19
Total Subscriptions ('000)	2,988.74	2,923.33	2,958.43	3,023.87	2,966.88	-1.88	-0.73
Calls to Fixed Services	86,053.01	93,670.74	98,289.48	87,413.06	81,083.45	-7.24	-5.78
On-Net Calls ('000 minutes)	929,173.28	1,067,256.07	1,048,824.05	1,040,921.01	1,036,946.81	-0.38	11.60
Off-Net Calls ('000 minutes)	452,710.15	589,636.82	715,883.40	826,774.67	915,610.82	10.74	102.25
International calls	223,720.08	217,455.24	206,835.34	189,787.73	188,782.93	-0.53	-15.62
Outgoing International ('000 minutes)	177,269.49	172,905.81	162,829.43	145,020.12	142,194.14	-1.95	-19.79
Incoming International ('000 minutes)	46,450.59	44,549.43	44,005.92	44,767.61	46,588.79	4.07	0.30
SMS/MMS traffic ('000 # of messages)	113,676.72	102,750.77	107,642.55	113,820.01	63,268.93	-44.41	-44.34
Total Revenue (J\$ ' million)	12,316.19	11,668.77	13,873.45	14,490.68	13,023.50	-10.12	5.74

Internet Market	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	% Change Q1 '20/Q4 '19	% Change Q1 '20/Q1 '19
Total Subscriptions ('000)	1,729.05	1,771.60	1,798.06	1,948.65	2,001.16	2.69	15.74
Fixed Broadband (≥256K)	293.22	297.87	313.42	317.91	331.98	4.43	13.22
WAP & Mobile Internet	1,435.83	1,473.73	1,484.64	1,630.74	1,669.18	2.36	16.25
Total Revenue (J\$' million)	7,511.58	7,980.86	9,352.85	10,434.84	9,117.43	-12.63	21.38

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