
Office of Utilities Regulation

Telecommunications Market Information Report October - December 2019



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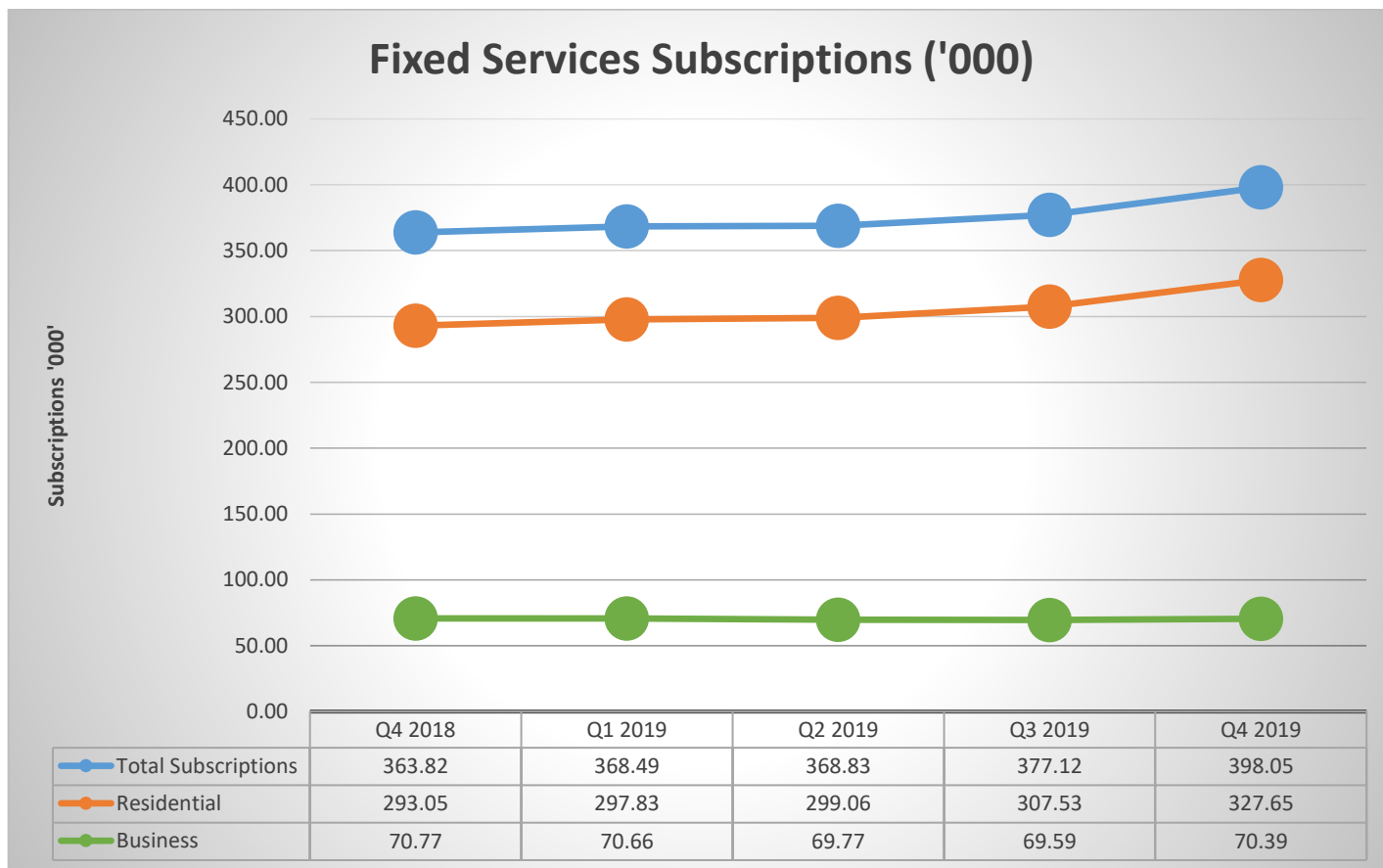
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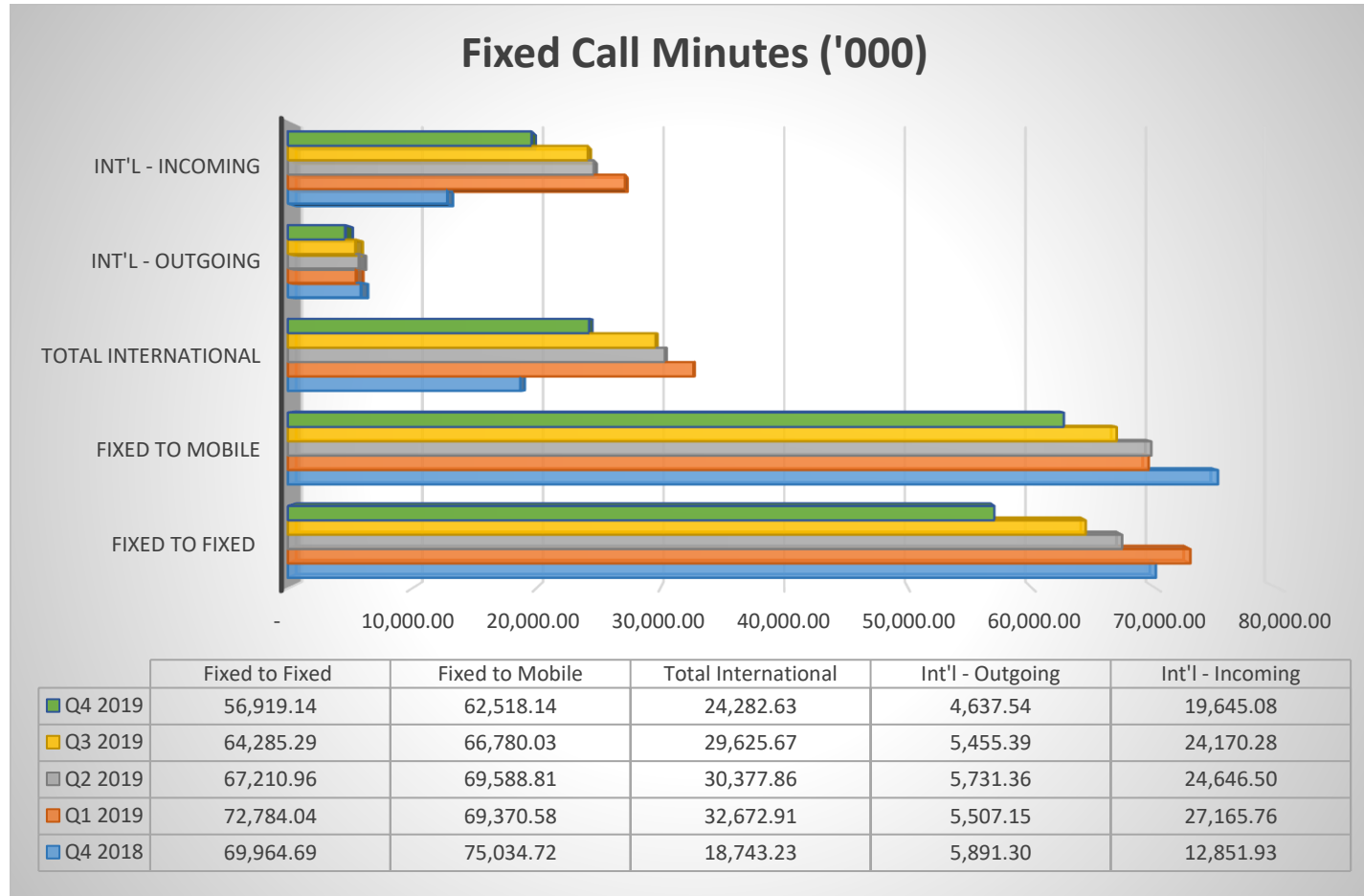
Fixed Market Data

Figure 1: Fixed Services Subscriptions



<u>% Change: Q4 '19/ Q3 '19</u>	
Total Subscriptions:	5.55 %
Residential:	6.54 %
Business:	1.16%

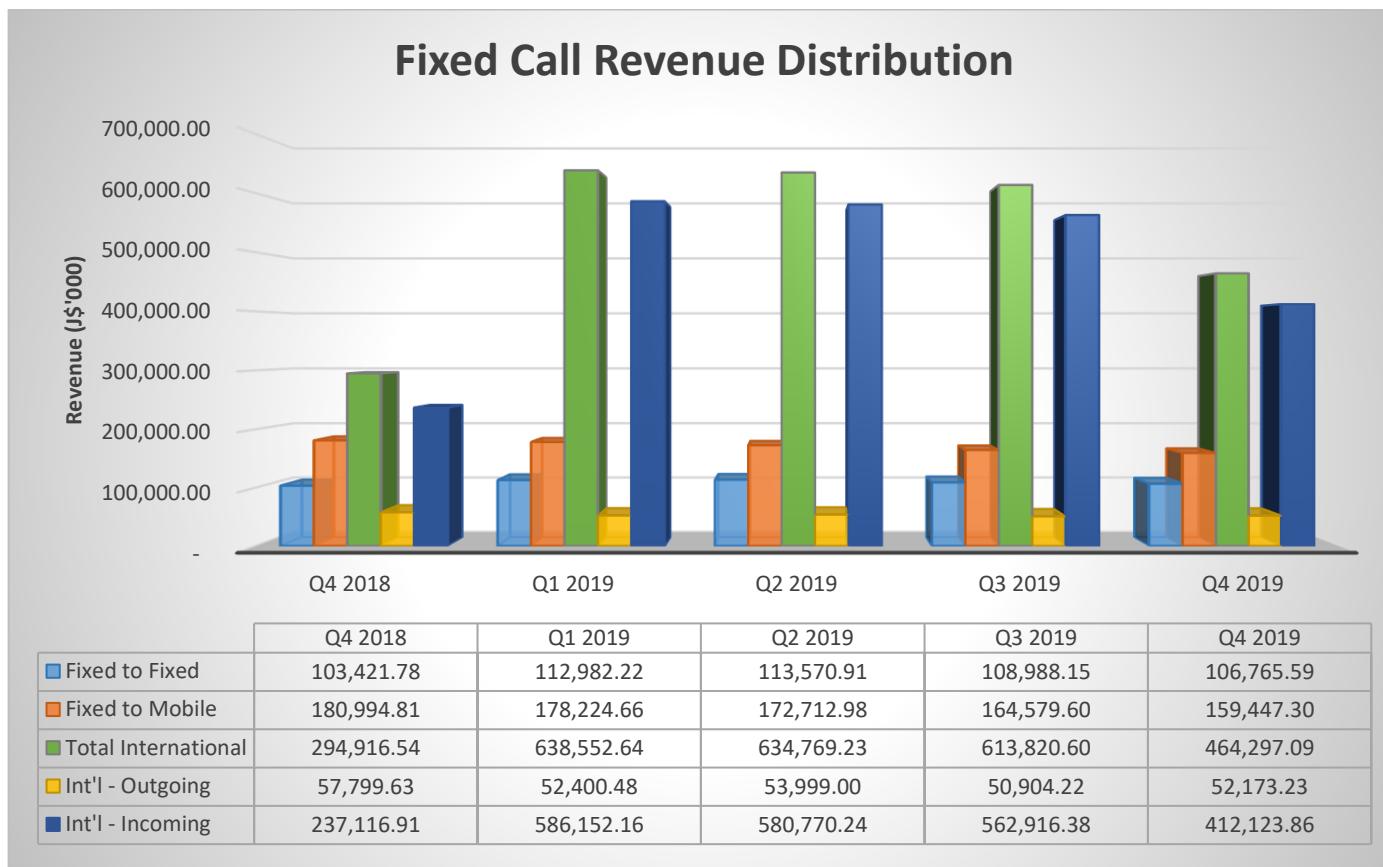
Figure 2: Fixed Call Minutes*



% change: Q4 '19/Q3 '19	
Fixed to Fixed:	-11.46%
Fixed to Mobile:	-6.38%
Total International:	-18.04%
Int'l - Outgoing:	-14.99%
Int'l - Incoming:	-18.72%

* A licensee has advised that its company made changes to its international routing arrangements during the 1st quarter of 2019. This has impacted trends in international incoming minutes and revenues.

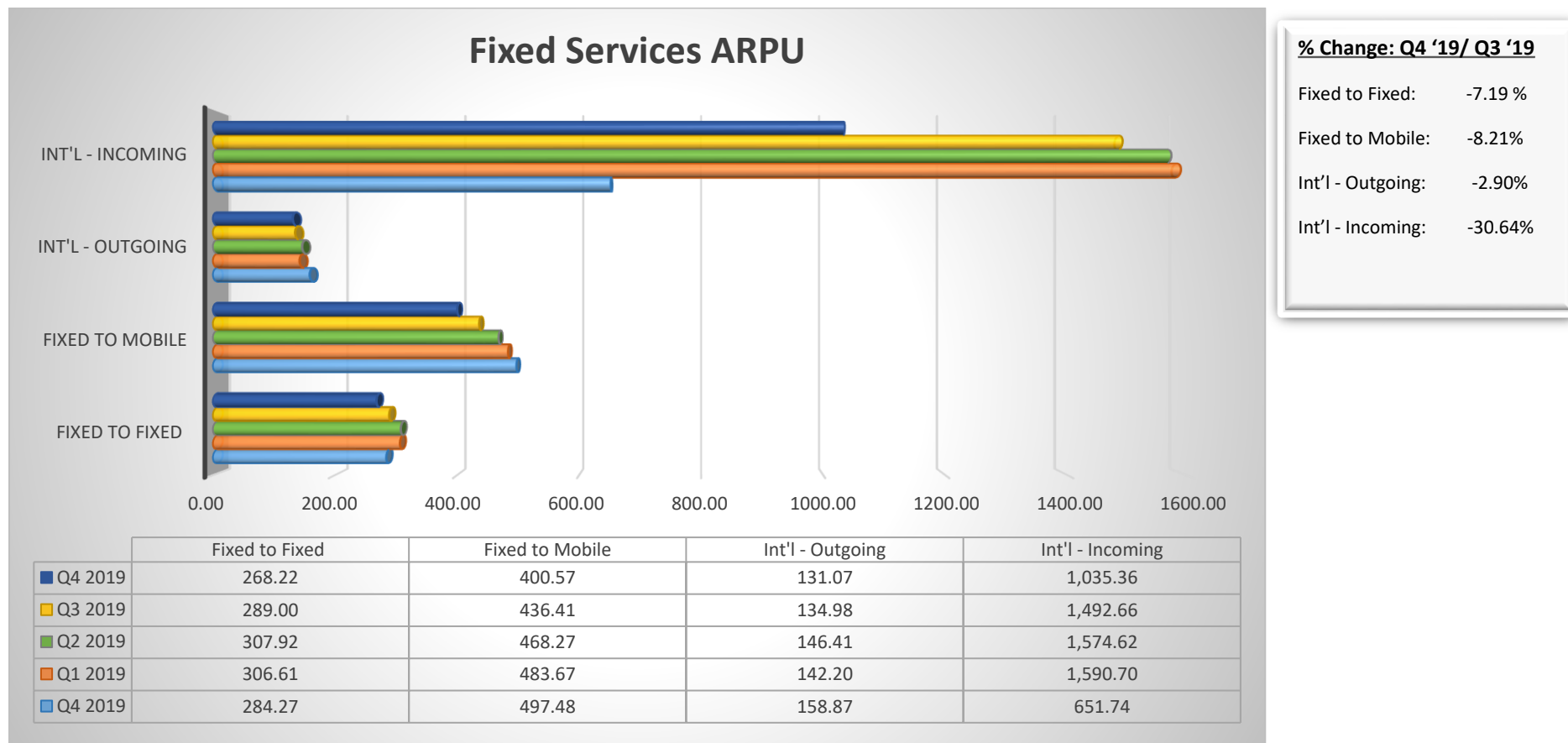
Figure 3: Fixed Call Revenue Distribution*



<u>% change Q4 '19/ Q3 '19</u>	
Fixed to Fixed:	-2.04%
Fixed to Mobile:	-3.12%
Total International:	-24.36%
Int'l - Outgoing:	2.49%
Int'l - Incoming:	-26.79%

* A licensee has advised that its company made changes to its international routing arrangements during the 1st quarter of 2019. This has impacted trends in international incoming minutes and revenues.

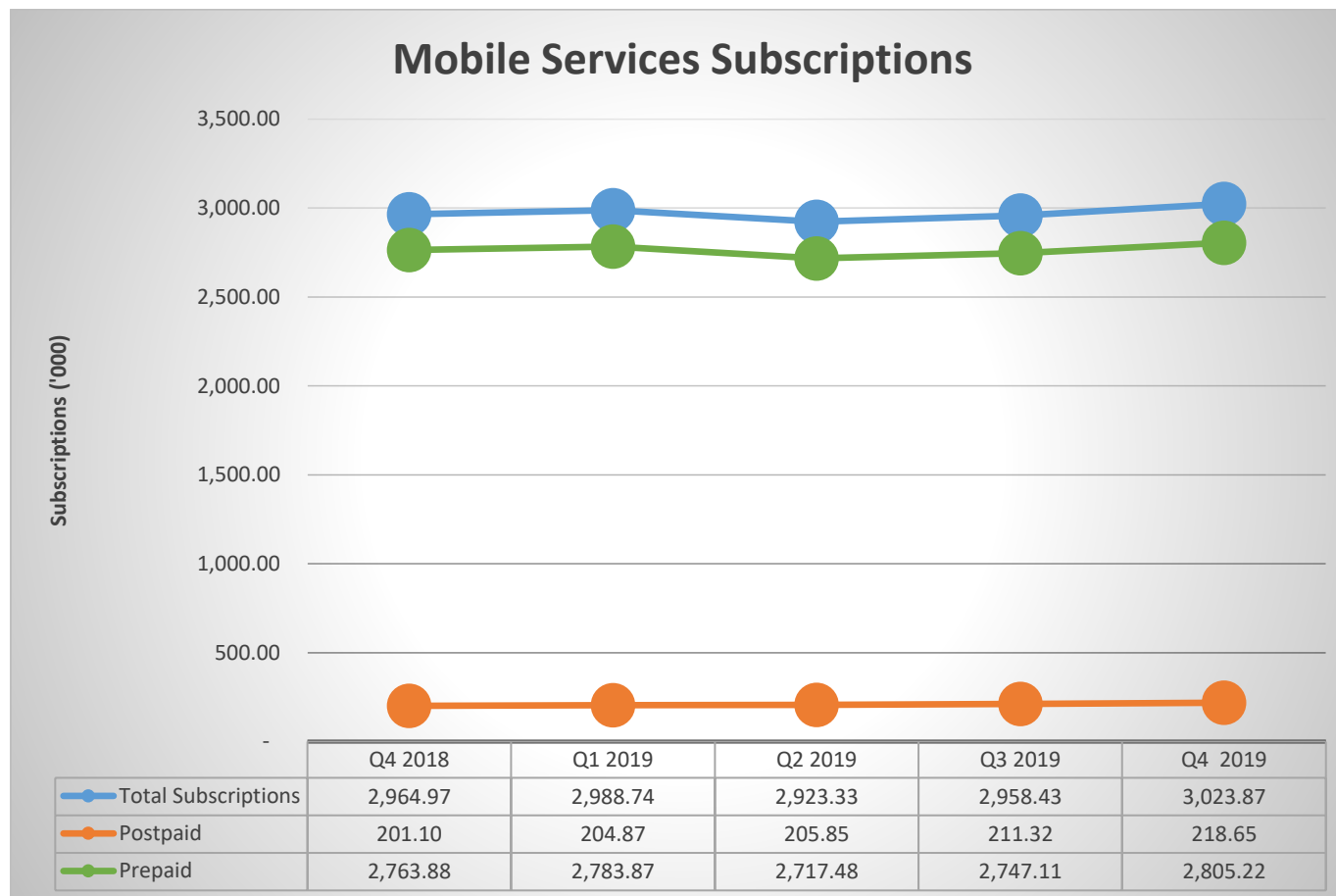
Figure 4: Fixed Services Average Revenue per User (ARPU)*



* A licensee has advised that its company made changes to its international routing arrangements during the 1st quarter of 2019. This has impacted trends in international incoming minutes and revenues.

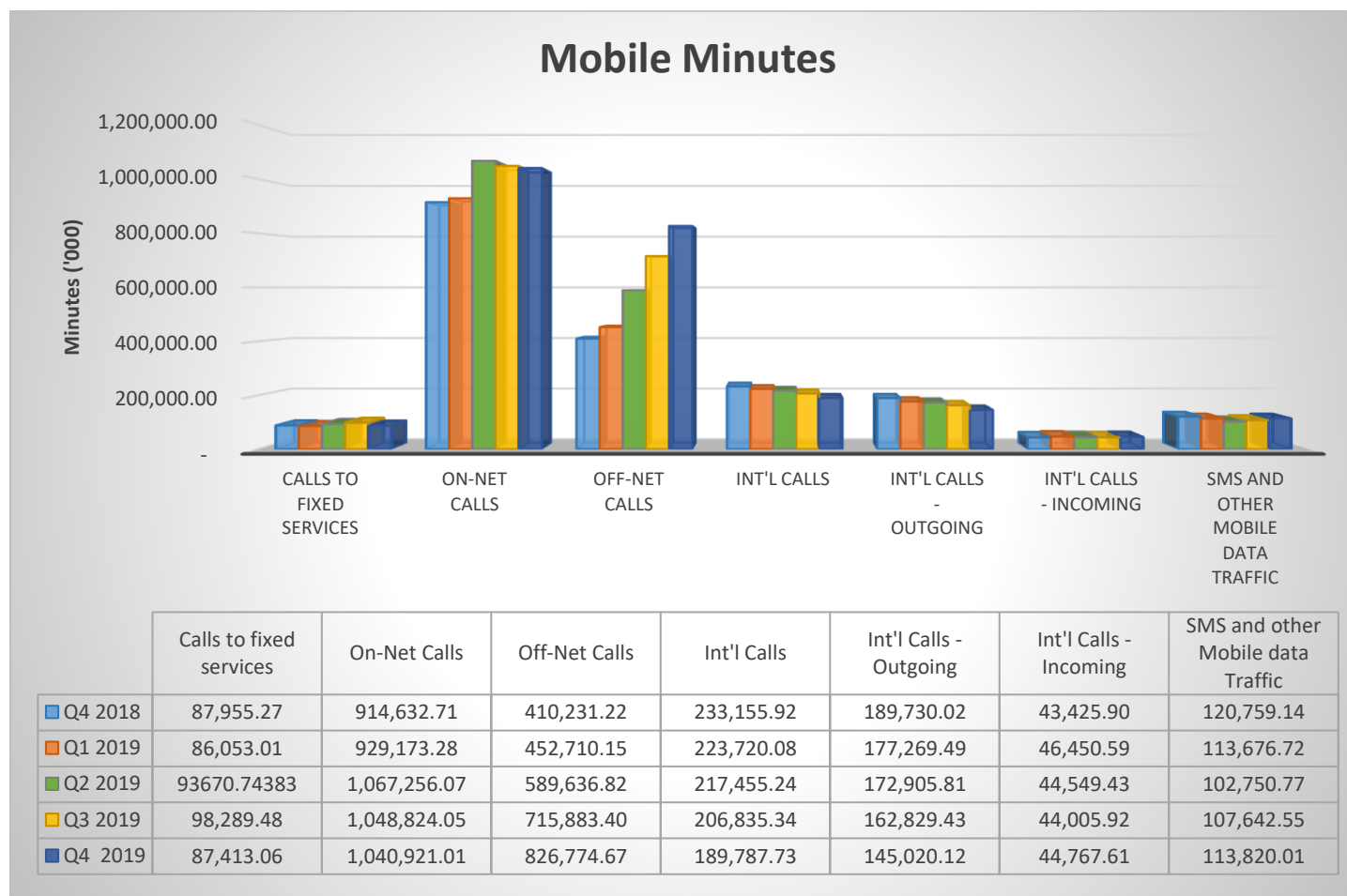
Mobile Market Data

Figure 5: Mobile Services Subscriptions



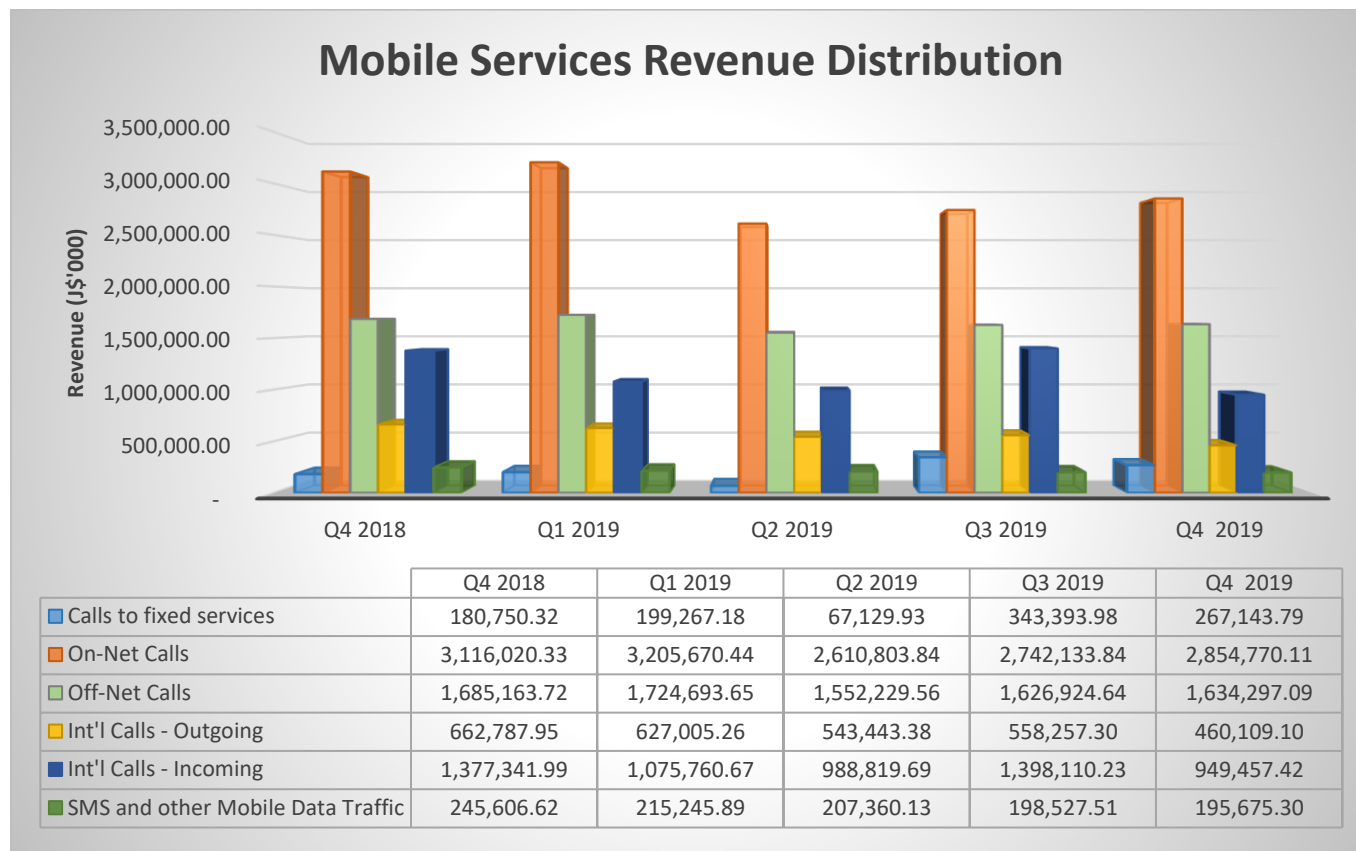
<u>% Change: Q4 '19/ Q3 '19</u>	
Total Subscriptions:	2.21%
Postpaid:	3.47%
Prepaid:	2.12%

Figure 6: Mobile Minutes



% Change: Q4 '19/ Q3 '19	
Calls to fixed services:	-11.07%
On-Net Calls:	-0.75%
Off-Net Calls:	15.49%
Int'l Calls:	-8.24%
Int'l Calls – Outgoing:	-10.94%
Int'l Calls – Incoming:	1.73%
SMS & other Mobile Data Traffic:	5.74%

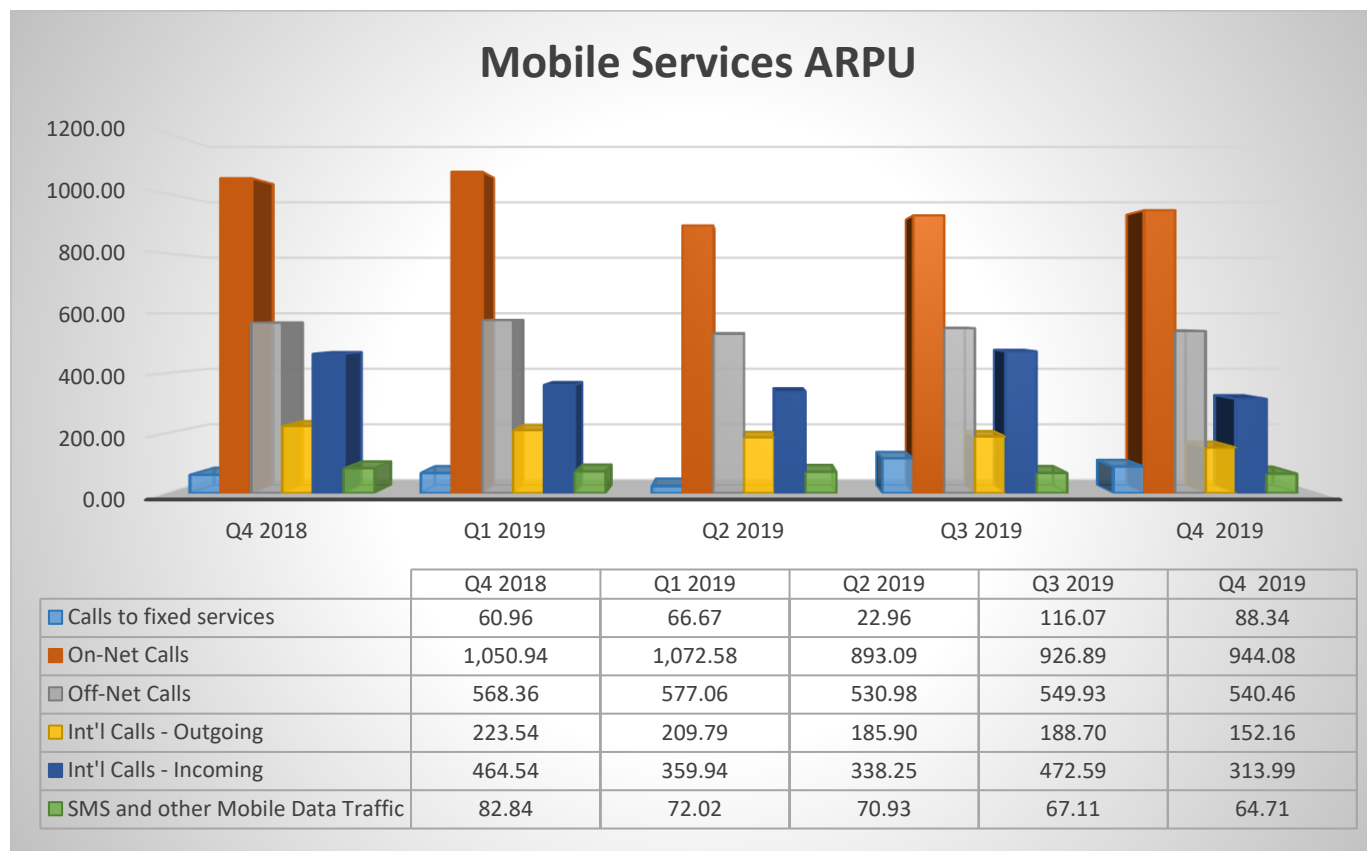
Figure 7: Mobile Services Revenue Distribution¹



<u>% Change: Q4 '19/ Q3 '19</u>	
Calls to Fixed services	-22.20%
On-Net Calls:	4.11%
Off-Net Calls:	0.45%
Int'l Calls – Outgoing:	-17.58%
Int'l Calls – Incoming:	-32.09%
SMS & other Mobile Data Traffic:	-1.44%

¹ The significant increase recorded for revenues arising from “calls to fixed services” for the comparative quarters Q2 2019 and Q3 2019 was due to reversals that were done by one operator to results previously reported for Q2 2019, resulting in the figures for the current reporting quarter of Q3 2019 appearing unusually high.

Figure 8: Mobile Services Average Revenue per User (ARPU)²

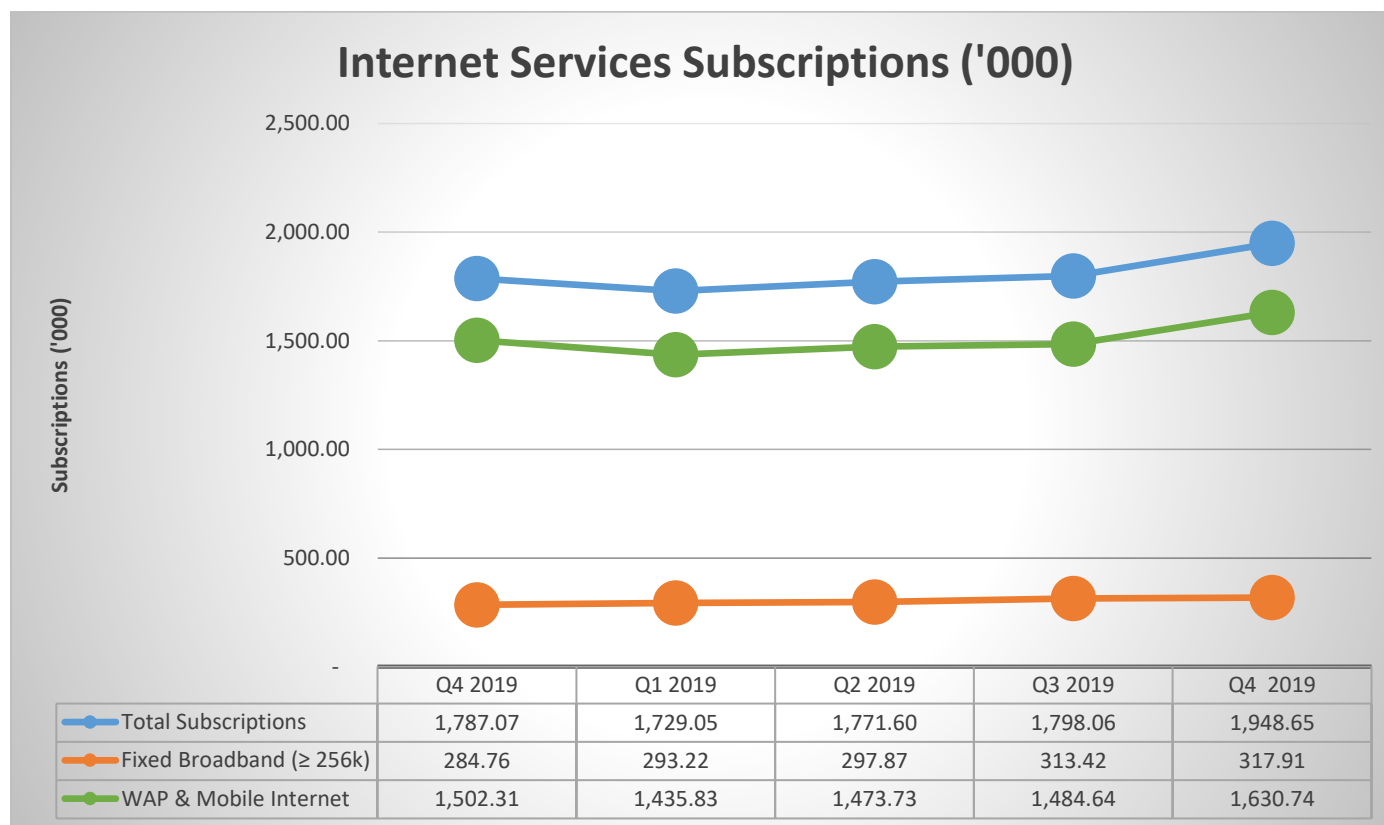


% Change Q4 '19/ Q3 '19	
Calls to fixed service:	-23.89%
On-Net Calls:	1.85%
Off-Net Calls:	-1.72%
Int'l Calls – Outgoing:	-19.36%
Int'l Calls – Incoming:	-33.56%
SMS & other Mobile Data Traffic:	-3.57%

² The significant increase recorded for revenues arising from “calls to fixed services” for the comparative quarters Q2 2019 and Q3 2019 was due to reversals that were done by one operator to results previously reported for Q2 2019, resulting in the figures for the current reporting quarter of Q3 2019 appearing unusually high.

Internet Market Data

Figure 9: Internet Services Subscriptions



<u>% Change Q4 '19/ Q3 '19</u>	
Total Subscriptions:	8.38%
Fixed Broadband (≥ 256k):	1.43%
WAP & Mobile Internet:	9.84%

Industry Penetration and Concentration

Penetration Rate³

Penetration Rate	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Fixed Subscription Penetration Rate	13.3%	13.5%	13.5%	13.8%	14.6%
Mobile Subscription Penetration Rate	108.6%	109.5%	107.1%	108.4%	110.8%
Fixed Broadband Subscription Penetration Rate	10.4%	10.7%	10.9%	11.5%	11.7%
Mobile Broadband Subscription Penetration Rate	55%	52.6%	54.0%	54.4%	59.8%
Total Broadband Subscription Penetration Rate	65.4%	63.4%	64.9%	65.9%	71.4%

Concentration Ratio (Herfindahl-Hirschman Index)⁴

Herfindahl-Hirschman Index (HHI)	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Fixed HHI	4,774	4,738	4,704	4,566	4,633
Mobile HHI	5,529	5,501	5,307	5,289	5,234
Fixed Broadband HHI	3,614	3,611	3,629	3,677	3,642
Mobile Broadband HHI	5,673	5,713	5,431	5,308	5,258

³ Calculated using population year end 2017 data from the Statistical Institute of Jamaica: 2,728,864.

⁴ Calculated using subscription data.

Appendix

Fixed Market	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	% Change Q4 '19/Q3 '19	% Change Q4 '19/Q4 '18
Total Subscriptions ('000)	363.82	368.49	368.83	377.12	398.05	5.55	9.41
Fixed to Fixed ('000 minutes)	69,964.69	72,784.04	67,210.96	64,285.29	56,919.14	-11.46	-18.65
Fixed to Mobile Calls ('000 minutes)	75,034.72	69,370.58	69,588.81	66,780.03	62,518.14	-6.38	-16.68
Total International Calls ('000 minutes)	18,743.23	32,672.91	30,377.86	29,625.67	24,282.63	-18.04	29.55
Outgoing International Calls ('000 minutes)	5,891.30	5,507.15	5,731.36	5,455.39	4,637.54	-14.99	-21.28
Incoming International Calls ('000 minutes)	12,851.93	27,165.76	24,646.50	24,170.28	19,645.08	-18.72	52.86
Total Revenue (J\$' million)	2,094.71	2,054.20	2,456.28	2,466.45	2,429.86	-1.48	16.00

Mobile Market	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	% Change Q4 '19/Q3 '19	% Change Q4 '19/Q4 '18
Total Subscriptions ('000)	2,964.97	2,988.74	2,923.33	2,958.43	3,023.87	2.21	1.99
Calls to Fixed Services	87,955.27	86,053.01	93,670.74	98,289.48	87,413.06	-11.07	-0.62
On-Net Calls ('000 minutes)	914,632.71	929,173.28	1,067,256.07	1,048,824.05	1,040,921.01	-0.75	13.81
Off-Net Calls ('000 minutes)	410,231.22	452,710.15	589,636.82	715,883.40	826,774.67	15.49	101.54
International calls	233,155.92	223,720.08	217,455.24	206,835.34	189,787.73	-8.24	-18.60
Outgoing International ('000 minutes)	189,730.02	177,269.49	172,905.81	162,829.43	145,020.12	-10.94	-23.57
Incoming International ('000 minutes)	43,425.90	46,450.59	44,549.43	44,005.92	44,767.61	1.73	3.09
SMS and other mobile data traffic	120,759.14	113,676.72	102,750.77	107,642.55	113,820.01	5.74	-5.75
Total Revenue (J\$ ' million)	12,237.22	12,316.19	11,668.77	13,873.45	14,490.68	4.45	18.41

Internet Market	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	% Change Q4 '19/Q3 '19	% Change Q4 '19/Q4 '18
Total Subscriptions ('000)	1,787.07	1,729.05	1,771.60	1,798.06	1,948.65	8.38	9.04
Fixed Broadband (≥256K)	284.76	293.22	297.87	313.42	317.91	1.43	11.64
WAP & Mobile Internet	1,502.31	1,435.83	1,473.73	1,484.64	1,630.74	9.84	8.55
Total Revenue (J\$' million)	7,042.99	7,511.58	7,980.86	9,352.85	10,434.84	11.57	48.16

Penetration Rate	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
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