
Office of Utilities Regulation

Telecommunications Market Information Report July - September 2020



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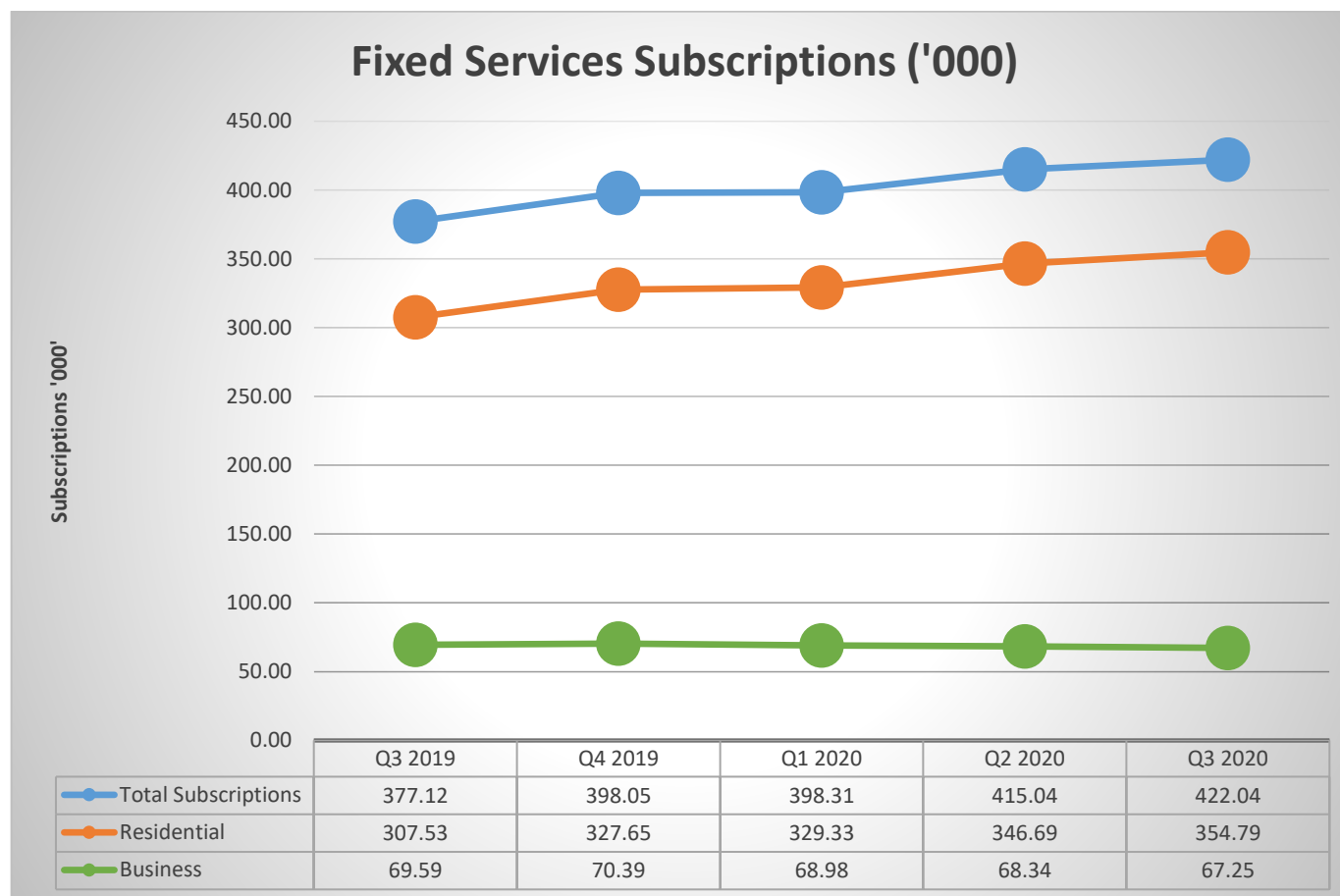
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Fixed Market Data

Figure 1: Fixed Services Subscriptions



% Change: Q3 '20/ Q2 '20

Total Subscriptions:	1.69%
Residential:	2.34%
Business:	-1.60 %

Figure 2: Fixed Call Minutes

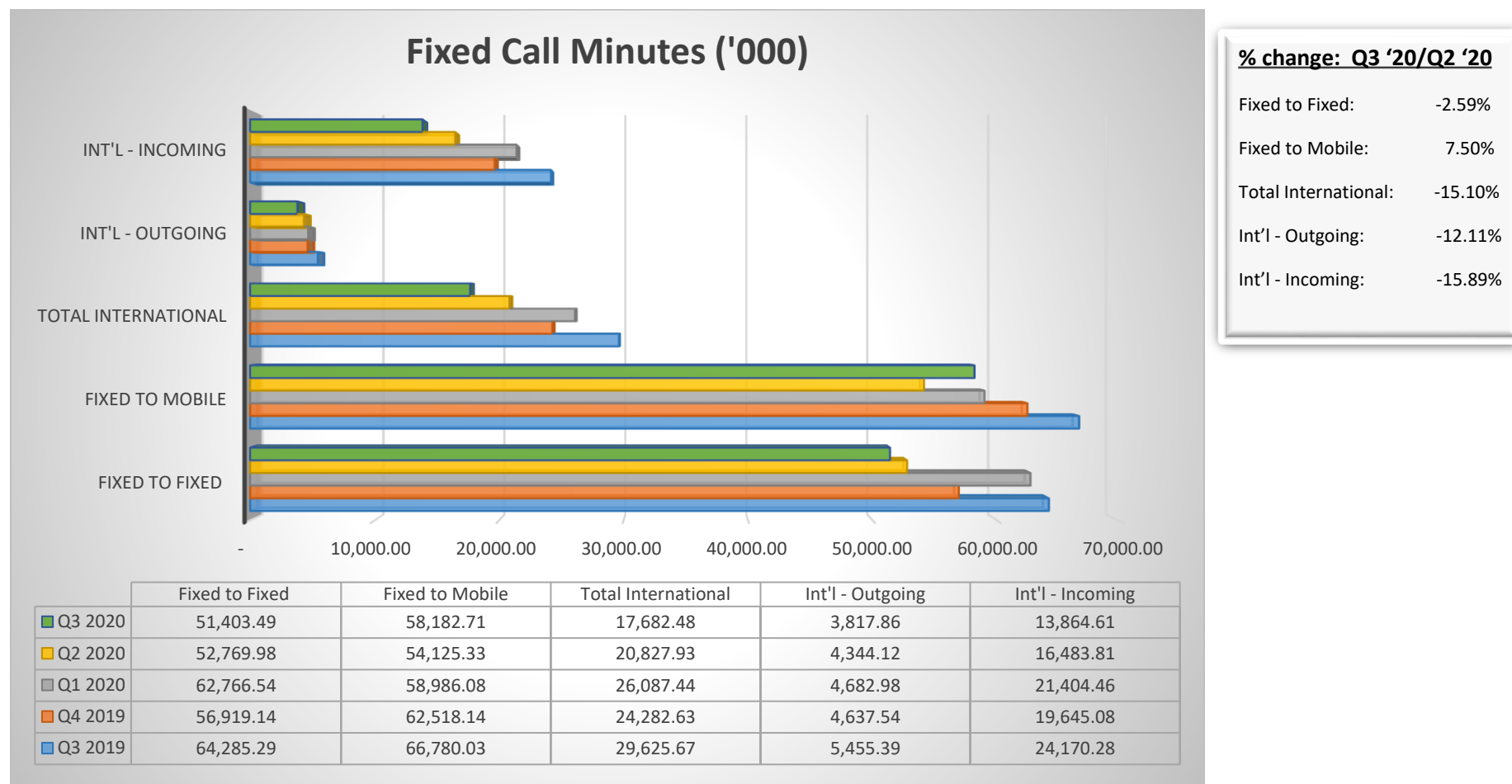


Figure 3: Fixed Call Revenue Distribution

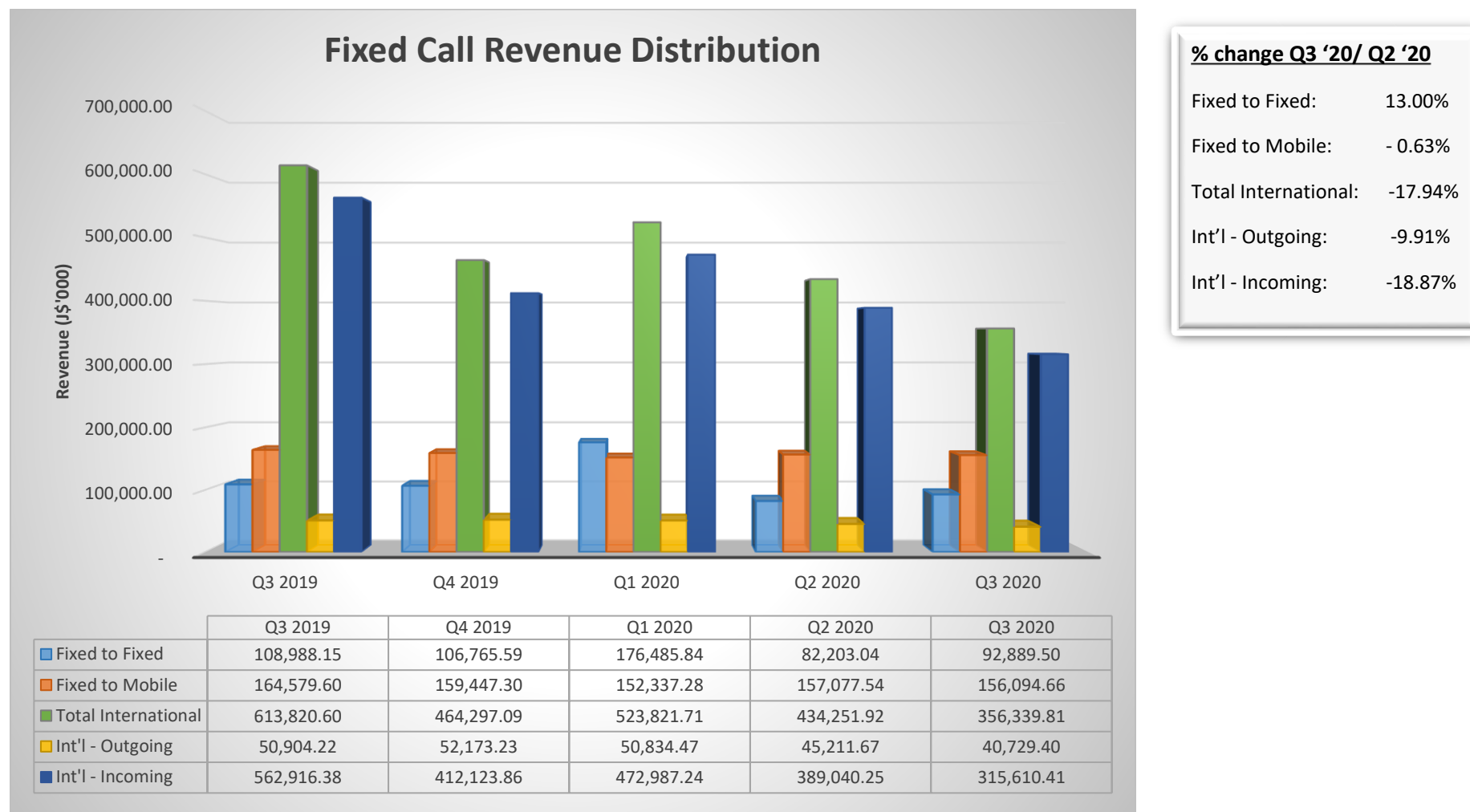
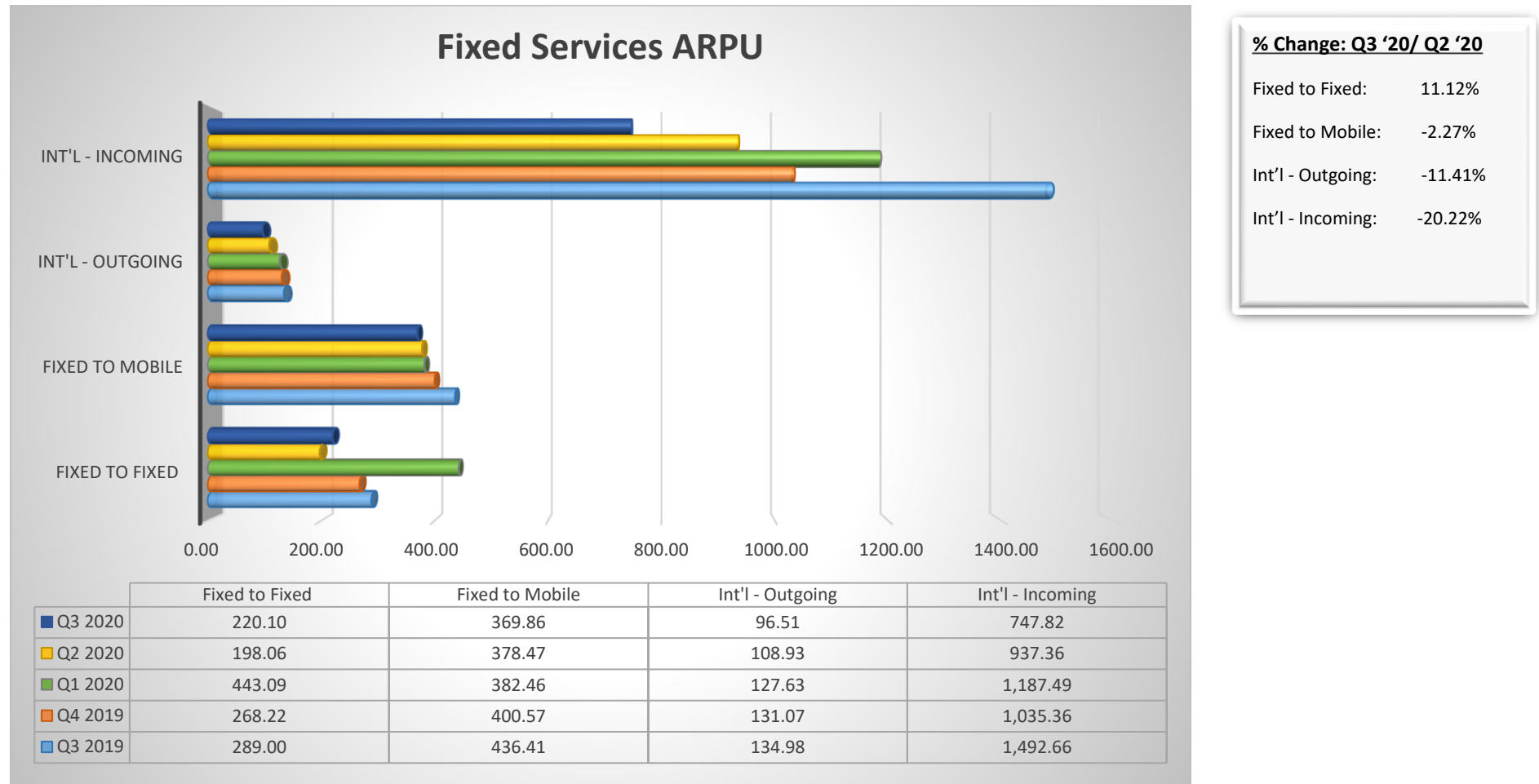
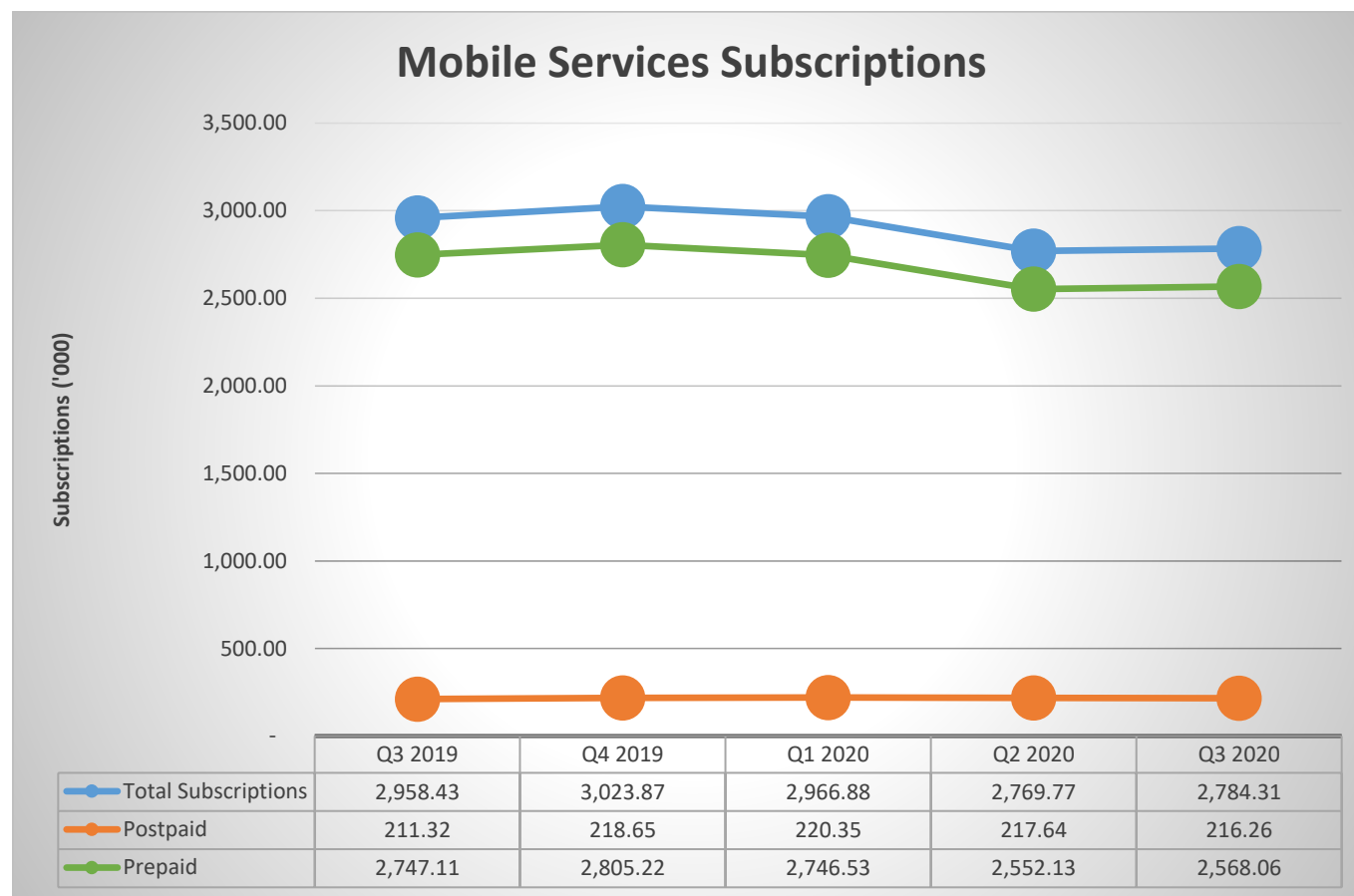


Figure 4: Fixed Services Average Revenue per User (ARPU)



Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q3 '20/ Q2 '20

Total Subscriptions: 0.53 %

Postpaid: - 0.63%

Prepaid: 0.62 %

Figure 6: Mobile Minutes

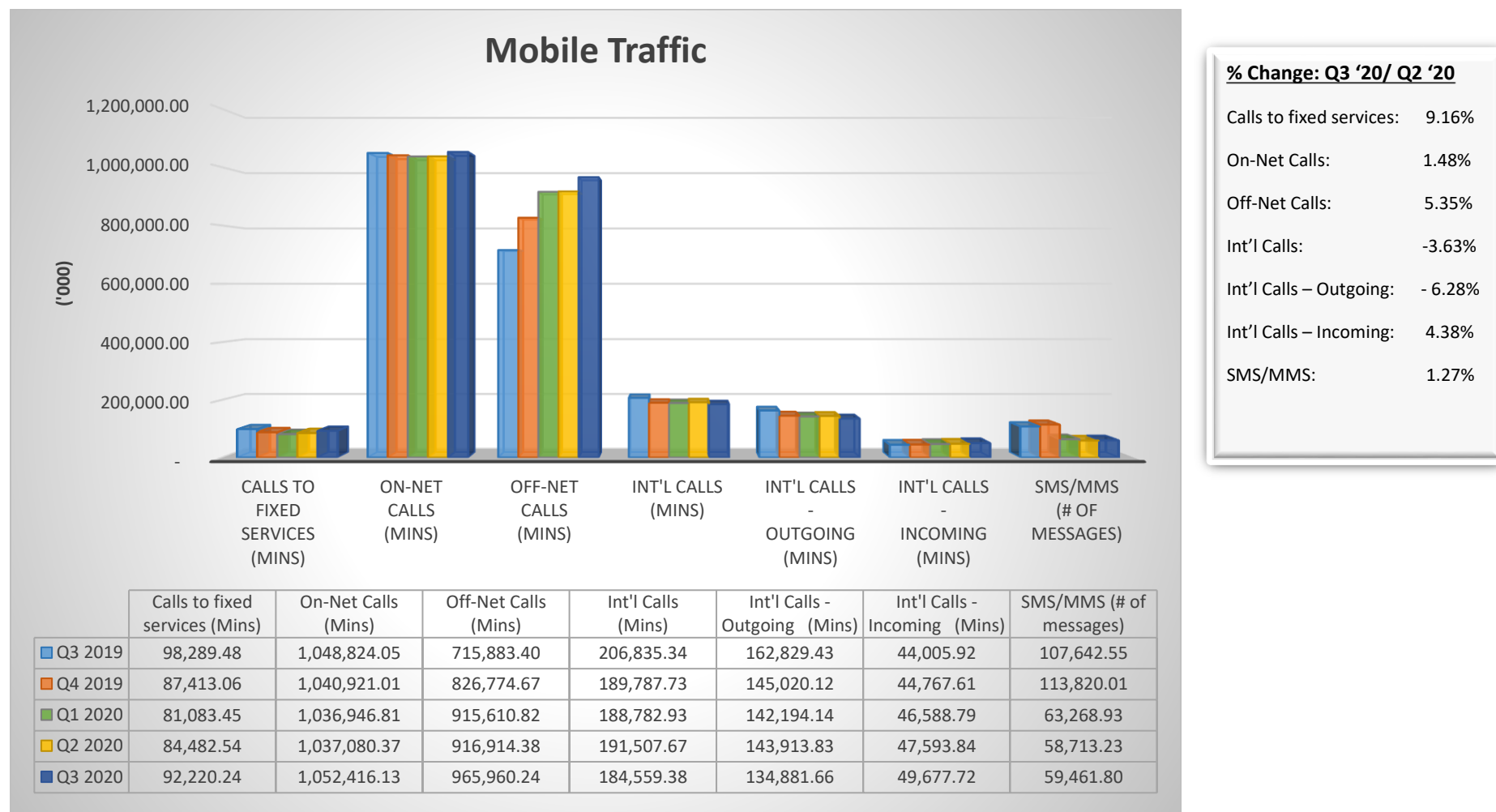
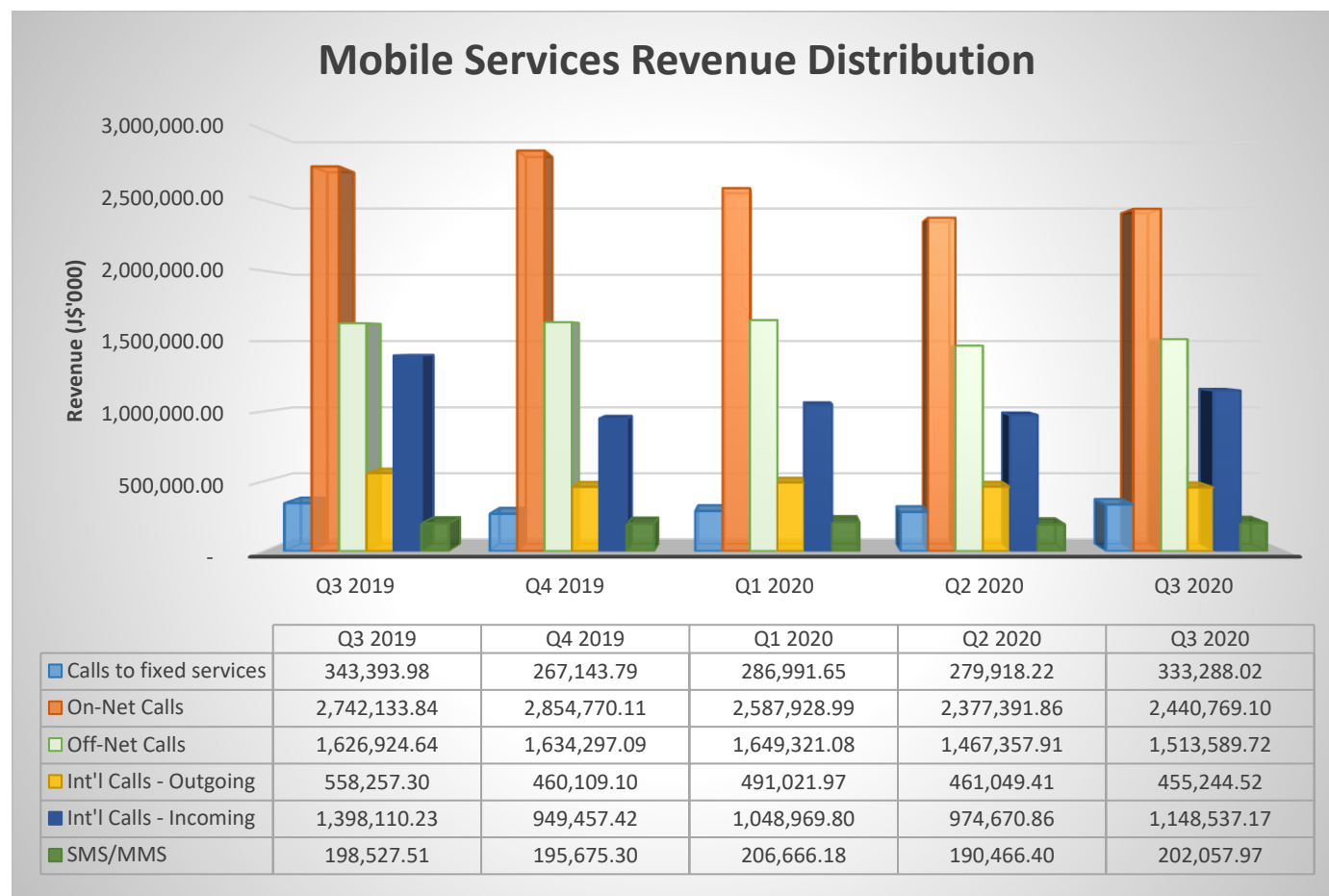


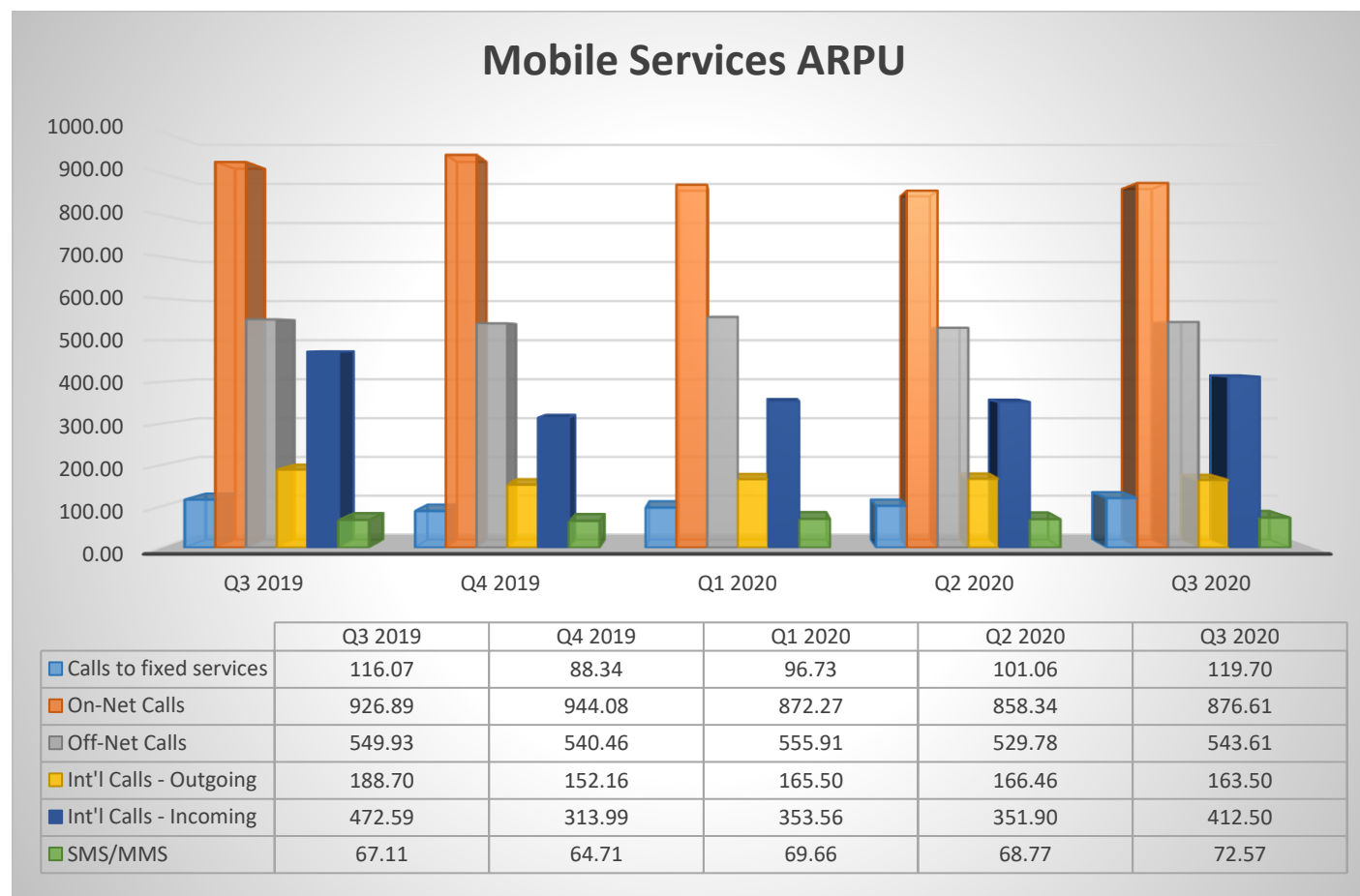
Figure 7: Mobile Services Revenue Distribution



% Change: Q3 '20/ Q2 '20

Calls to Fixed services	19.07%
On-Net Calls:	2.67%
Off-Net Calls:	3.15%
Int'l Calls – Outgoing:	-1.26%
Int'l Calls – Incoming:	17.84%
SMS/MMS:	6.09%

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

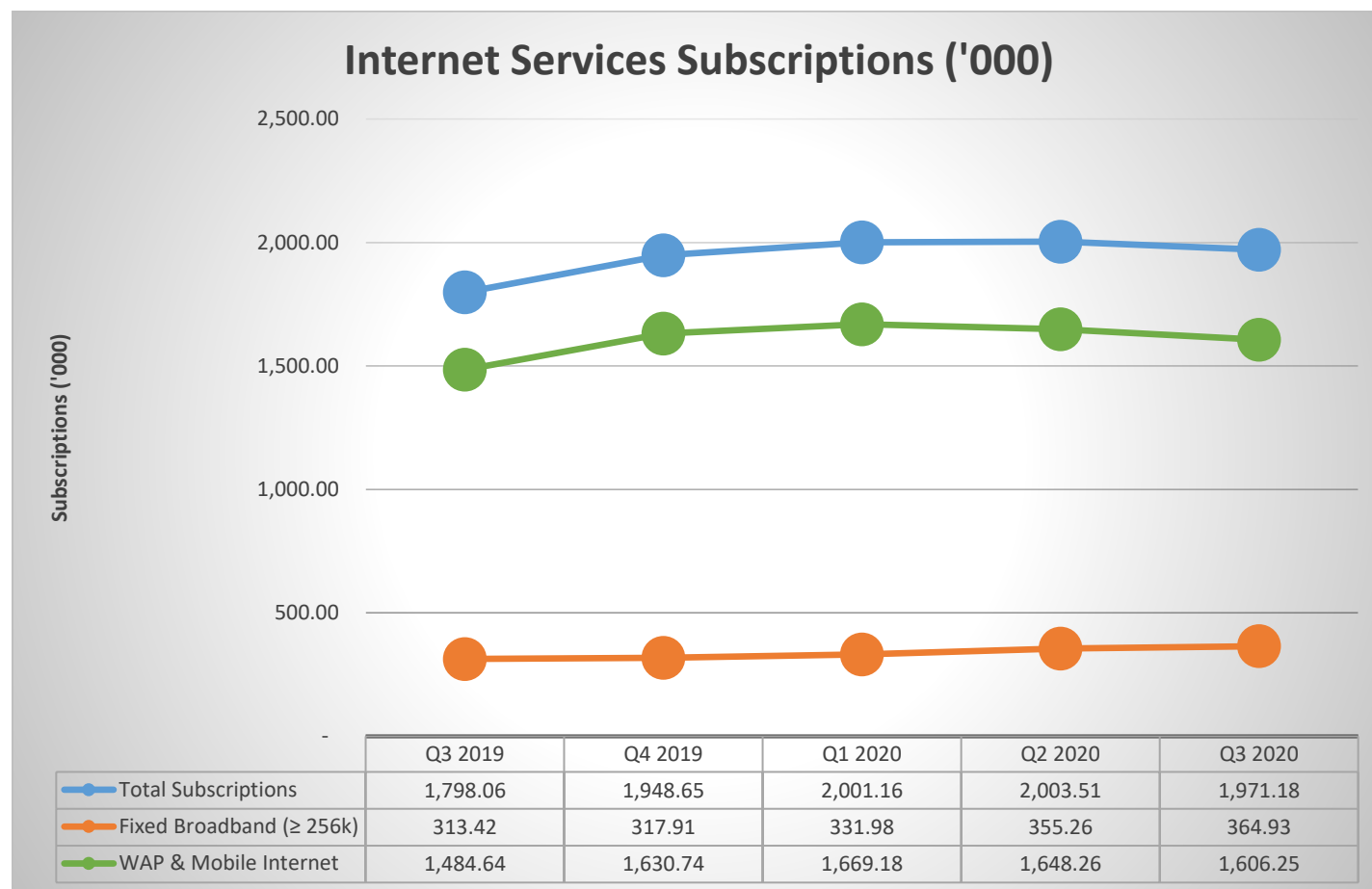


% Change Q3 '20/ Q2 '20

Calls to fixed service:	18.44%
On-Net Calls:	2.13%
Off-Net Calls:	2.61%
Int'l Calls – Outgoing:	-1.77%
Int'l Calls – Incoming:	17.22%
SMS/MMS:	5.53%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q3 '20/ Q2 '20

Total Subscriptions: -
1.61%

Fixed Broadband (≥ 256k):
2.72%

WAP & Mobile Internet: -
2.55%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020
Fixed Subscription Penetration Rate	13.8%	14.6%	14.6%	15.2%	15.4%
Mobile Subscription Penetration Rate	108.4%	110.8%	108.5%	101.3%	101.8%
Fixed Broadband Subscription Penetration Rate	11.5%	11.7%	12.1%	13.0%	13.4%
Mobile Broadband Subscription Penetration Rate	54.4%	59.8%	61.1%	60.3%	58.8%
Total Broadband Subscription Penetration Rate	65.9%	71.4%	73.2%	73.3%	72.1%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020
Fixed HHI	4,566	4,633	4,725	4,673	4,707
Mobile HHI	5,289	5,234	5,204	5,150	5,141
Fixed Broadband HHI	3,677	3,642	3,673	3,704	3,716
Mobile Broadband HHI	5,308	5,258	5,311	5,435	5,227

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	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	% Change Q3 '20/Q2 '20	% Change Q3 '20/Q3 '19
Total Subscriptions ('000)	377.12	398.05	398.31	415.04	422.04	1.69	11.91
Fixed to Fixed ('000 minutes)	64,285.29	56,919.14	62,766.54	52,769.98	51,403.49	-2.59	- 20.04
Fixed to Mobile Calls ('000 minutes)	66,780.03	62,518.14	58,986.08	54,125.33	58,182.71	7.50	- 12.87
Total International Calls ('000 minutes)	29,625.67	24,282.63	26,087.44	20,827.93	17,682.48	-15.10	- 40.31
Outgoing International Calls ('000 minutes)	5,455.39	4,637.54	4,682.98	4,344.12	3,817.86	-12.11	-30.02
Incoming International Calls ('000 minutes)	24,170.28	19,645.08	21,404.46	16,483.81	13,864.61	-15.89	- 42.64
Total Revenue (J\$' million)	2,466.45	2,429.86	2,490.16	2,341.85	2,354.01	0.52	- 4.56

Mobile Market	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	% Change Q3 '20/Q2 '20	% Change Q3 '20/Q3 '19
Total Subscriptions ('000)	2,958.43	3,023.87	2,966.88	2,769.77	2,784.31	0.53	-5.89
Calls to Fixed Services	98,289.48	87,413.06	81,083.45	84,482.54	92,220.24	9.16	-6.17
On-Net Calls ('000 minutes)	1,048,824.05	1,040,921.01	1,036,946.81	1,037,080.37	1,052,416.13	1.48	0.34
Off-Net Calls ('000 minutes)	715,883.40	826,774.67	915,610.82	916,914.38	965,960.24	5.35	34.93
International calls	206,835.34	189,787.73	188,782.93	191,507.67	184,559.38	-3.63	-10.77
Outgoing International ('000 minutes)	162,829.43	145,020.12	142,194.14	143,913.83	134,881.66	-6.28	-17.16
Incoming International ('000 minutes)	44,005.92	44,767.61	46,588.79	47,593.84	49,677.72	4.38	12.89
SMS/MMS traffic ('000 # of messages)	107,642.55	113,820.01	63,268.93	58,713.23	59,461.80	1.27	-44.76
Total Revenue (J\$ ' million)	13,873.45	14,490.68	13,023.50	12,110.46	12,958.42	7.00	- 6.60

Internet Market	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	% Change Q3 '20/Q2 '20	% Change Q2 '20/Q2 '19
Total Subscriptions ('000)	1,798.06	1,948.65	2,001.16	2,003.51	1,971.18	-1.61	9.63
Fixed Broadband (≥256K)	313.42	317.91	331.98	355.26	364.93	2.72	16.44
WAP & Mobile Internet	1,484.64	1,630.74	1,669.18	1,648.26	1,606.25	-2.55	8.19
Total Revenue (J\$' million)	9,352.85	10,434.84	9,117.43	9,274.19	9,603.67	3.55	2.68

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