
Office of Utilities Regulation

Telecommunications Market Information Report

April - June 2016



OFFICE OF UTILITIES REGULATION

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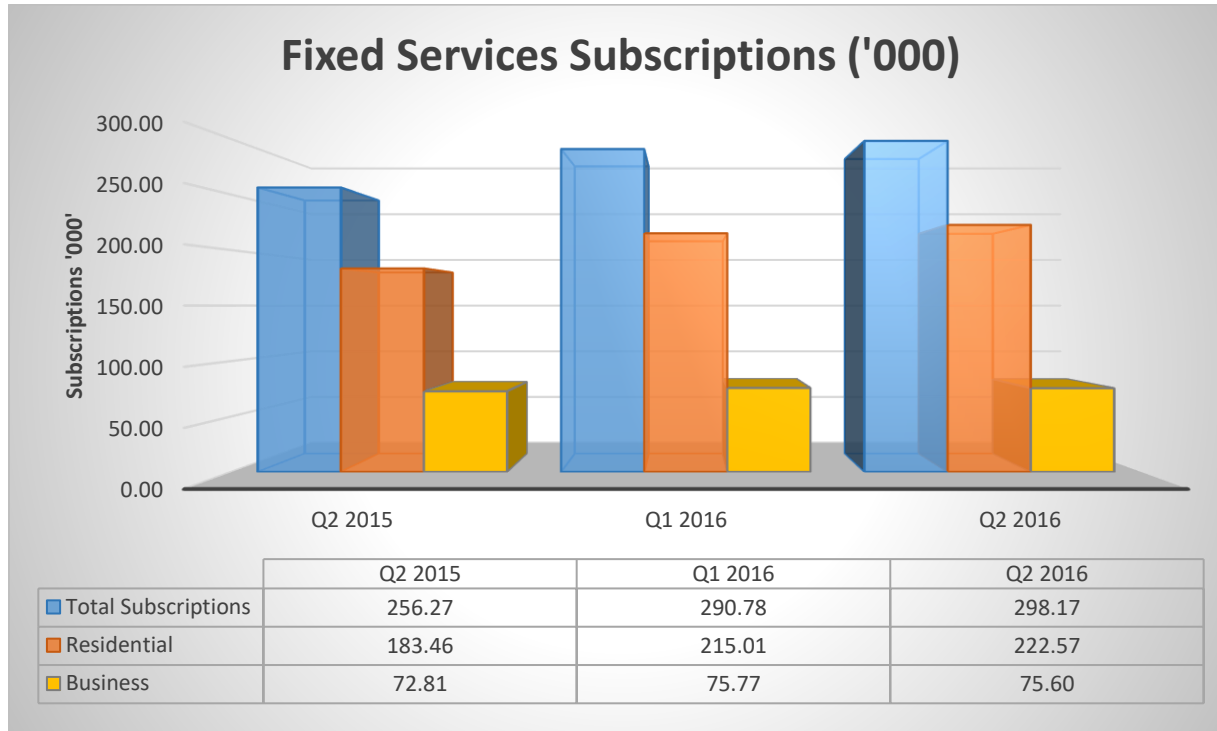
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Fixed Market Data

Figure 1 Fixed Services Subscriptions



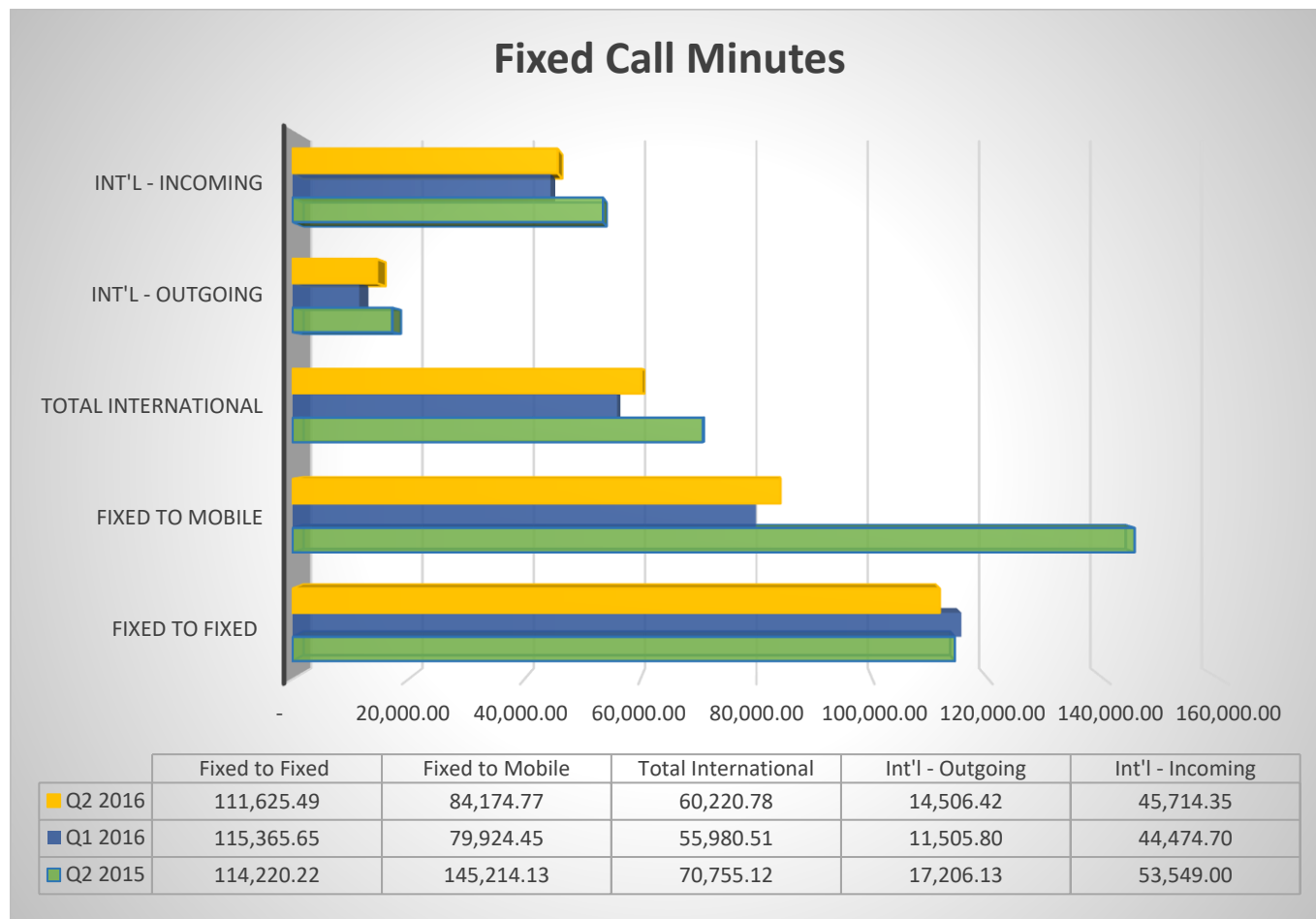
% Change: Q2 '16/ Q1 '16

Total Subscriptions: 2.54%

Residential: 3.52%

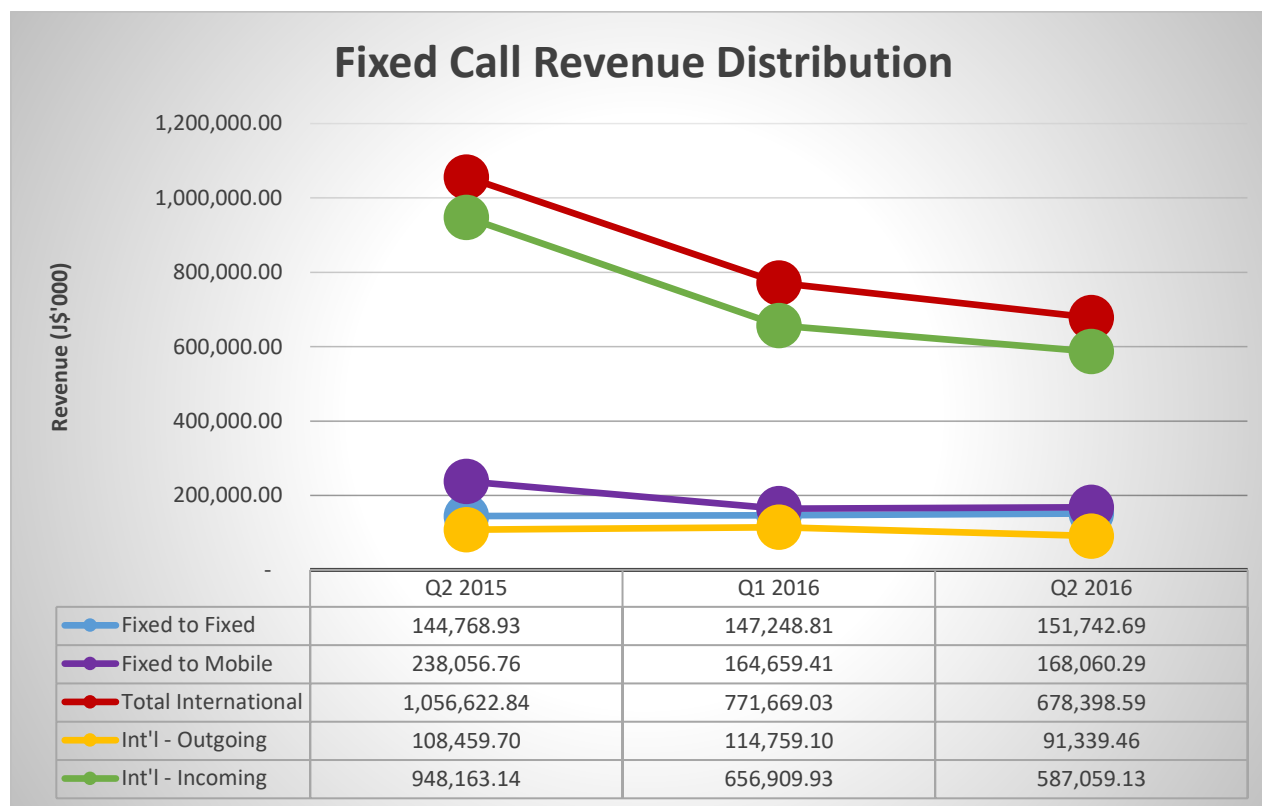
Business: -0.22%

Figure 2: Fixed Call Minutes



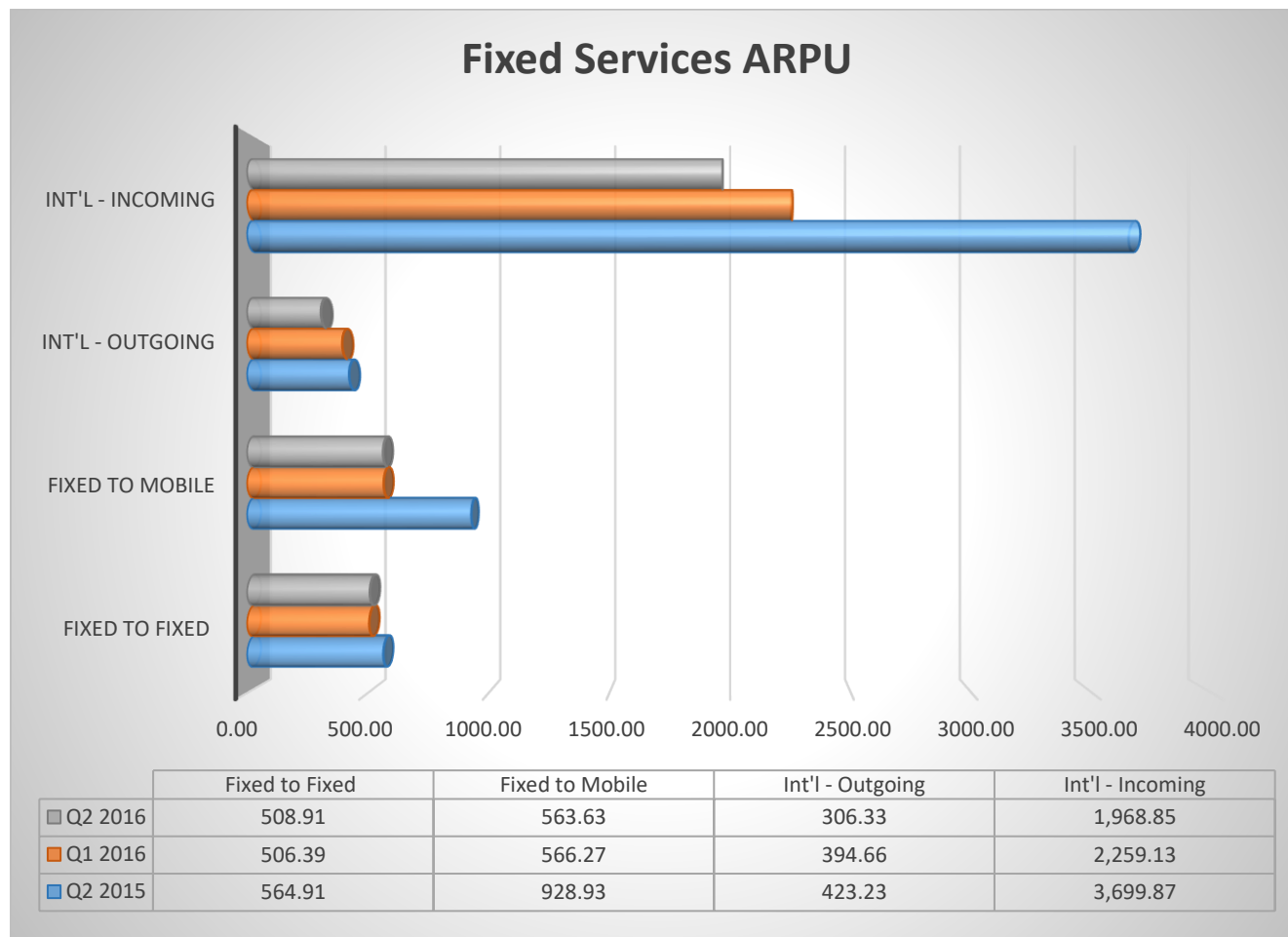
% change: Q2 '16/Q1 '16	
Fixed to Fixed:	-3.24%
Fixed to Mobile:	5.32%
Total International:	7.57%
Int'l - Outgoing:	26.08%
Int'l - Incoming:	2.79%

Figure 3: Fixed Call Revenue Distribution



<u>% change Q2 '16/ Q1 '16</u>	
Fixed to Fixed:	3.05%
Fixed to Mobile:	2.07%
Total International:	-12.09%
Int'l - Outgoing:	-20.41%
Int'l - Incoming:	-10.63%

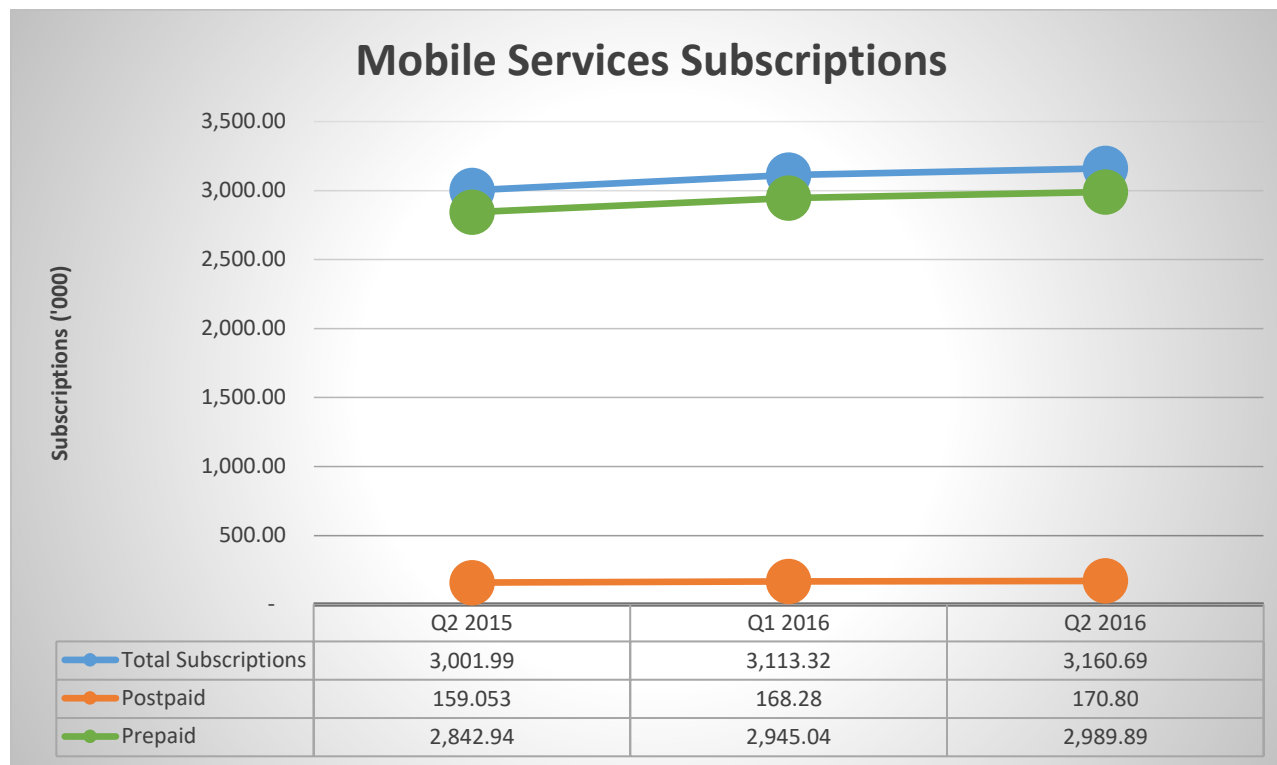
Figure 4: Fixed Services Average Revenue per User (ARPU)



% Change: Q2 '16/ Q1 '16	
Fixed to Fixed:	0.50%
Fixed to Mobile:	-0.47%
Int'l - Outgoing:	-22.38%
Int'l - Incoming:	-12.85%

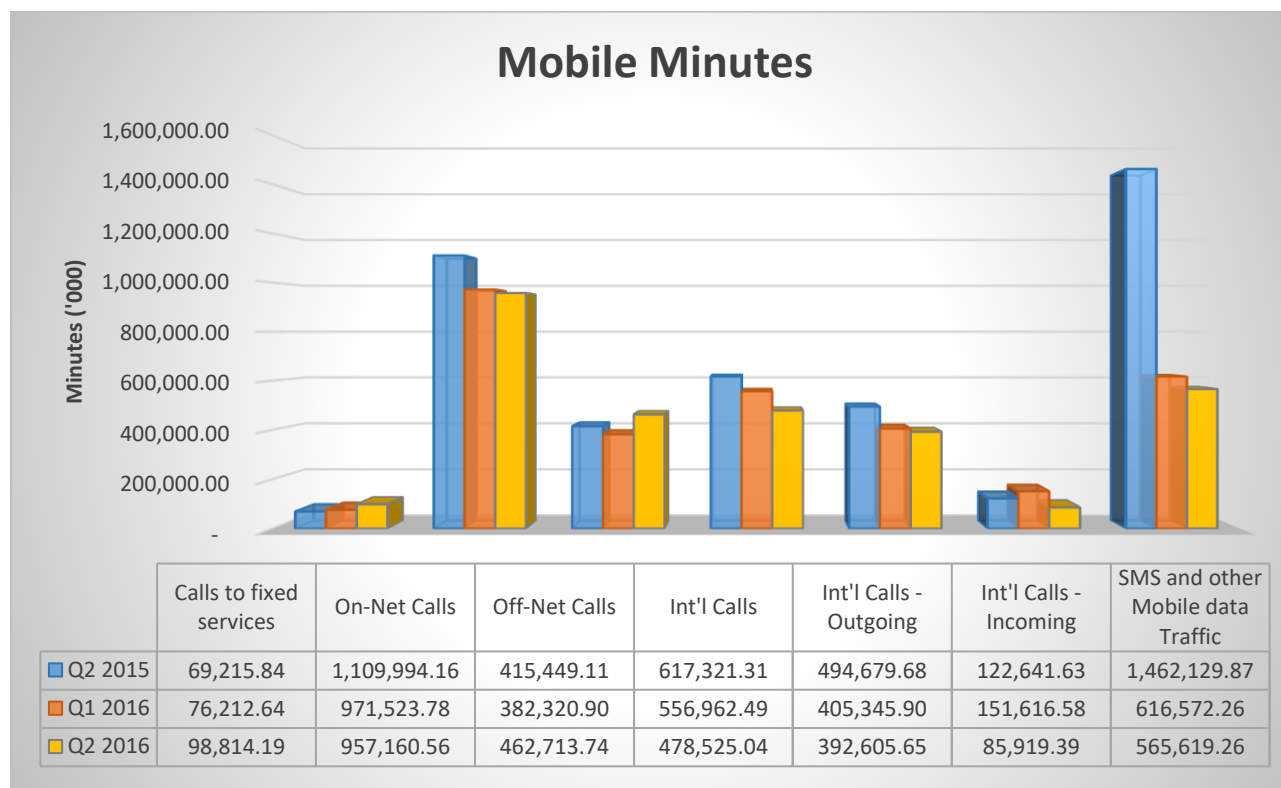
Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q2 '16/ Q1 '16	
Total Subscriptions:	1.52%
Postpaid:	1.50%
Prepaid:	1.52%

Figure 6: Mobile Minutes



% Change: Q2 '16/ Q1 '16

Calls to fixed services: 29.66%

On-Net Calls: -1.48%

Off-Net Calls: 21.03%

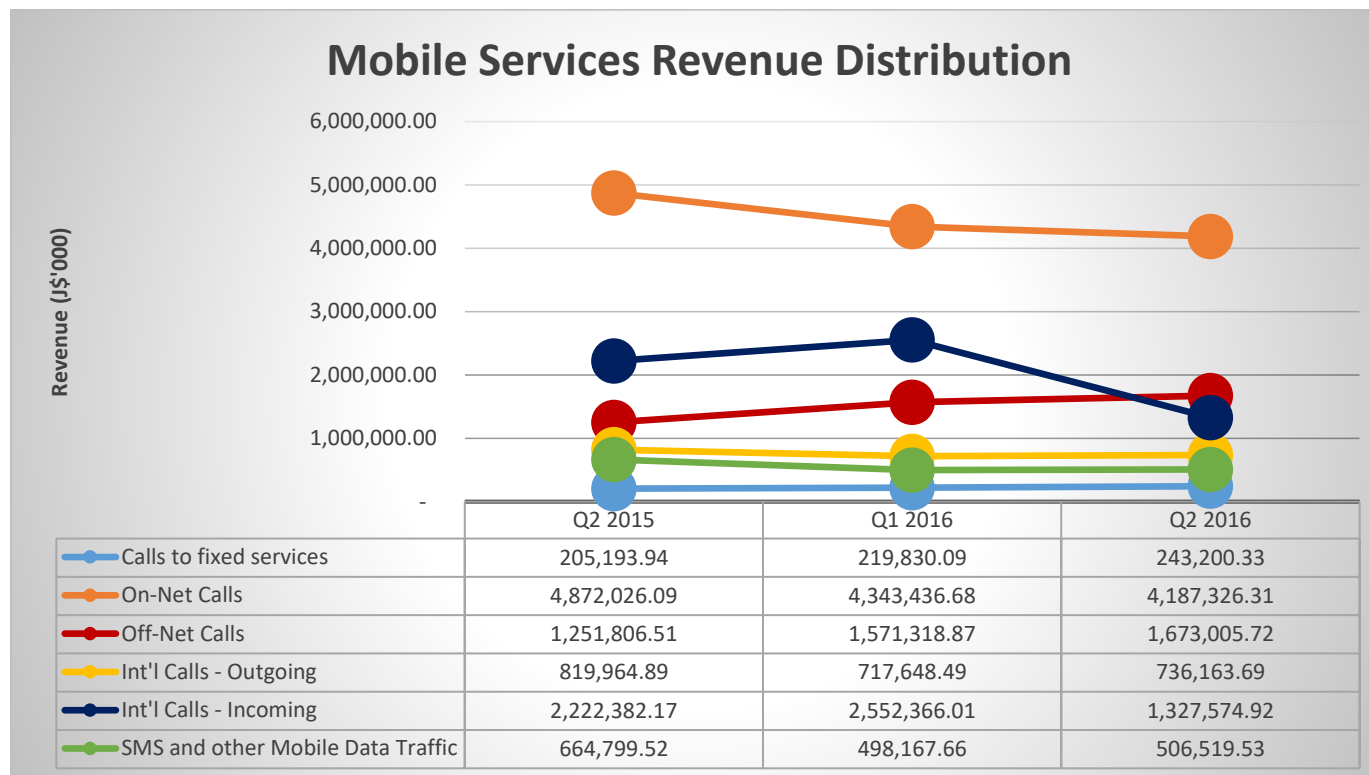
Int'l Calls: -14.08%

Int'l Calls – Outgoing: -3.14%

Int'l Calls – Incoming: -43.33%

SMS & other Mobile Data Traffic: -8.26%

Figure 7: Mobile Services Revenue Distribution



% Change: Q2 '16/ Q1 '16

Calls to Fixed services: 10.63%

On-Net Calls: -3.59%

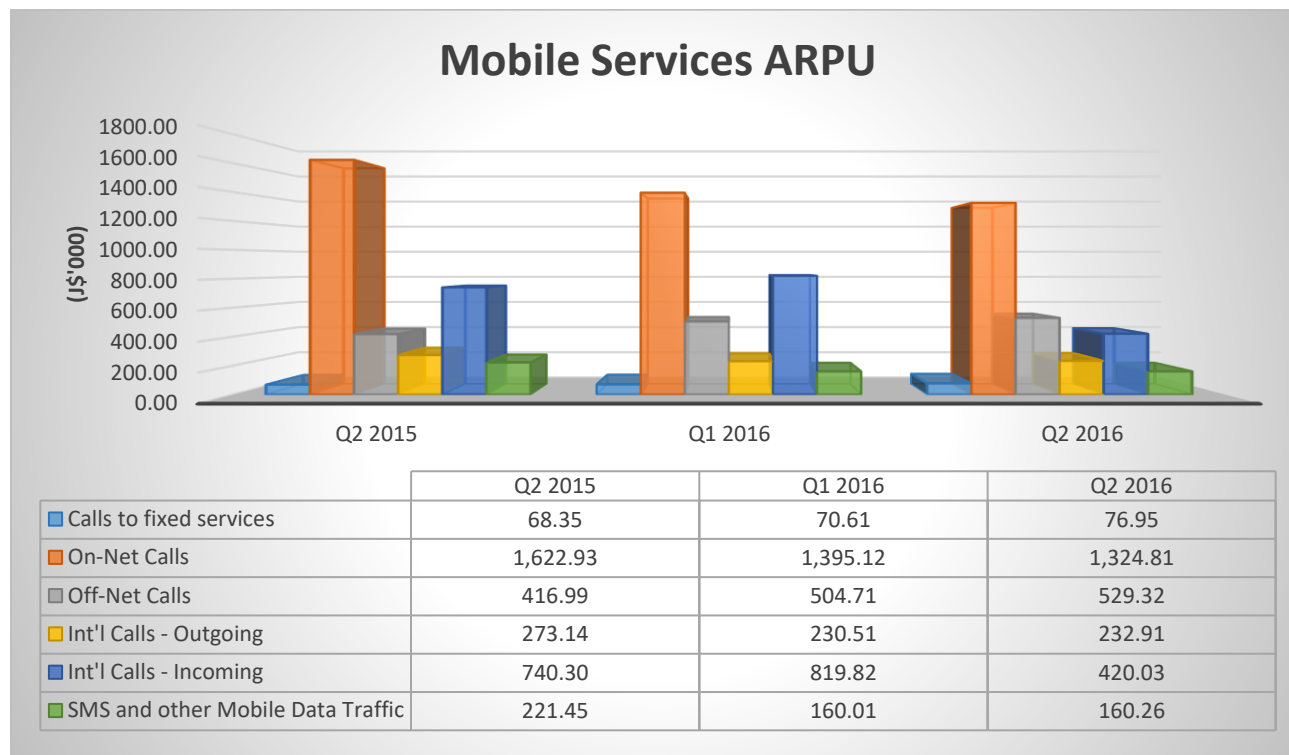
Off-Net Calls: 6.47%

Int'l Calls – Outgoing: 2.58%

Int'l Calls – Incoming: -47.99 %

SMS & other Mobile Data Traffic: 1.68%

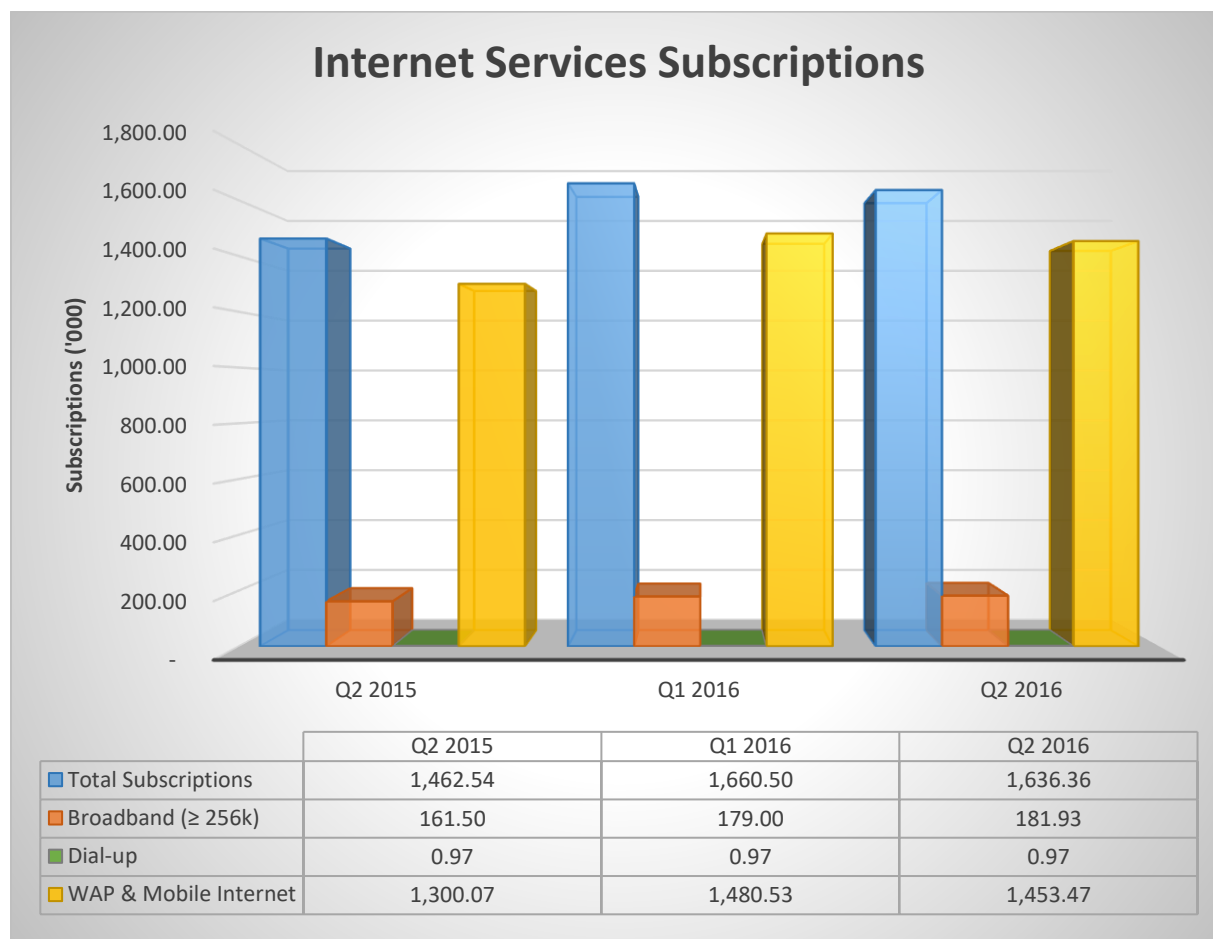
Figure 8: Mobile Services Average Revenue per User (ARPU)



% Change Q2 '16/ Q1 '16	
Calls to fixed service:	8.97%
On-Net Calls:	-5.04%
Off-Net Calls:	4.88%
Int'l Calls – Outgoing:	1.04%
Int'l Calls – Incoming:	-48.77%
SMS & other Mobile Data Traffic:	0.15%

Internet Market Data

Figure 9: Internet Services Subscriptions



<u>% Change Q2 '16/ Q1 '16</u>	
Total Subscriptions:	-1.45%
Broadband (≥ 256k):	1.64%
Dial-up:	0%
WAP & Mobile Internet:	-1.83%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q2 2015	Q1 2016	Q2 2016
Fixed Subscription Penetration Rate	9.41%	10.68%	10.95%
Mobile Subscription Penetration Rate	110%	114%	116%
Fixed Broadband Subscription Penetration Rate	6%	7%	7%
Mobile Broadband Subscription Penetration Rate	48%	54%	53%
Total Broadband Subscription Penetration Rate	54%	61%	60%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q2 2015	Q1 2016	Q2 2016
Fixed HHI	8,237	7,997	7,602
Mobile HHI	5,965	5,789	5,782
Fixed Broadband HHI	5,004	5,020	4,978
Mobile Broadband HHI	7,035	6,578	6,446

¹ Calculated using population year end 2014 data from the Statistical Institute of Jamaica: 2,723,246.

² Calculated using subscription data.

Appendix

Fixed Market	Q2 2015	Q1 2016	Q2 2016	% Change Q2'16/Q1'16	% Change Q2'16/Q2 '15
Total Subscriptions ('000)	256.27	290.78	298.17	2.54	16.35
Fixed to Fixed ('000 minutes)	114,220.22	115,365.65	111,625.49	-3.24	-2.27
Fixed to Mobile Calls ('000 minutes)	145,214.13	79,924.45	84,174.77	5.32	-42.03
Total International Calls ('000 minutes)	70,755.12	55,980.51	60,220.78	7.57	-14.89
Outgoing International Calls ('000 minutes)	17,206.13	11,505.80	14,506.42	26.08	-15.69
Incoming International Calls ('000 minutes)	53,549.00	44,474.70	45,506.42	2.79	-14.63
Total Revenue (J\$' million)	2,477.18	2,180.05	2110.93	-3.17	-14.78

Mobile Market	Q2 2015	Q1 2016	Q2 2016	% Change Q2'16/Q1' 16	% Change Q2'16/Q2 '15
Total Subscriptions ('000)	3,001.99	3,113.32	3,160.69	1.52	5.29
On-Net Calls ('000 minutes)	1,109,994.16	971,523.78	957,160.56	-1.48	-13.77
Off-Net Calls ('000 minutes)	415,449.11	382,320.90	462,713.78	21.03	11.38
International calls	617,321.31	556,962.49	478,525.04	-14.08	-22.48
Outgoing International ('000 minutes)	494,679.68	405,345.90	392,605.65	-3.14	-20.63
Incoming International ('000 minutes)	122,641.63	151,616.58	85,919.39	-43.33	-29.94
SMS and other mobile data traffic	1,349,061.36	616,572.26	565,619.26	-8.26	-61.32
Total Revenue (J\$ ' million)	13,357.02	14,192.33	12,969.69	-8.61	-2.90

Internet Market	Q2 2015	Q1 2016	Q2 2016	% Change Q2'16/Q1'16	% Change Q2'16/Q2 '15
Total Subscriptions ('000)	1,462.54	1,660.50	1,636.36	-1.45	11.89
Broadband (≥256K)	161.50	179.00	181.93	1.64	12.65
Dial-up	0.97	0.97	0.97	0.00	0.00
WAP & Mobile Internet	1,300.07	1,480.53	1,453.47	-1.83	11.80
Total Revenue (J\$' million)	4,245.44	4,951.76	5,074.14	2.47	19.52

Penetration Rate	Q2 2015	Q1 2016	Q2 2016
Fixed Subscription Penetration Rate	9.41%	10.68%	10.95%
Mobile Subscription Penetration Rate	110%	114%	116%
Fixed Broadband Subscription Penetration Rate	6%	7%	7%
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Total Broadband Subscription Penetration Rate	54%	61%	60%

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