
Office of Utilities Regulation

Telecommunications Market Information Report January – March 2017



OFFICE OF UTILITIES REGULATION

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Office of Utilities Regulation
3rd Floor, PCJ Resource Centre
36 Trafalgar Road
Kingston 10
Jamaica

Phone: 876-968-6053-4 / Fax: 876-929-3635

website: www.our.org.jm

facebook: [facebook.com/officeofutilitiesregulation](https://www.facebook.com/officeofutilitiesregulation)

twitter: theOURja

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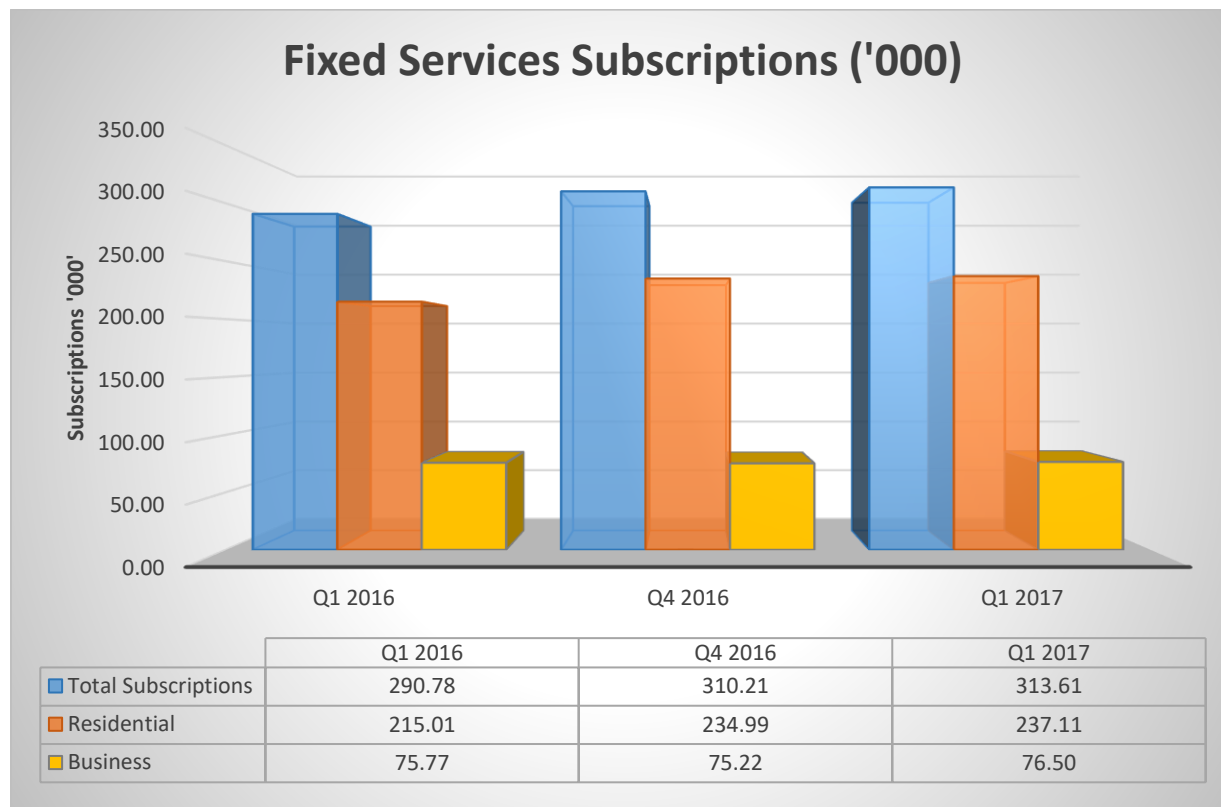
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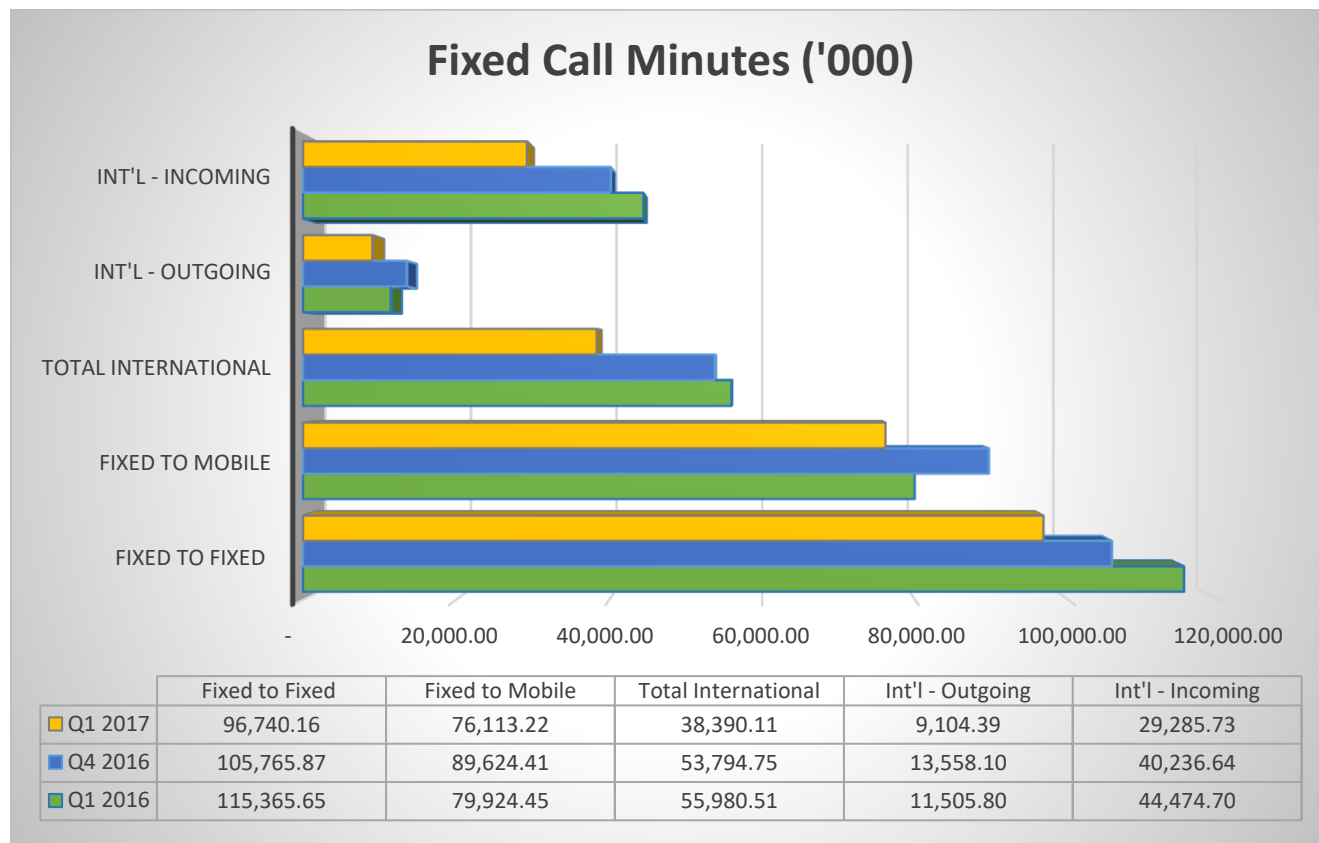
Fixed Market Data

Figure 1: Fixed Services Subscriptions



% Change: Q1 '17/ Q4 '16	
Total Subscriptions:	1.09%
Residential:	0.90%
Business:	1.70%

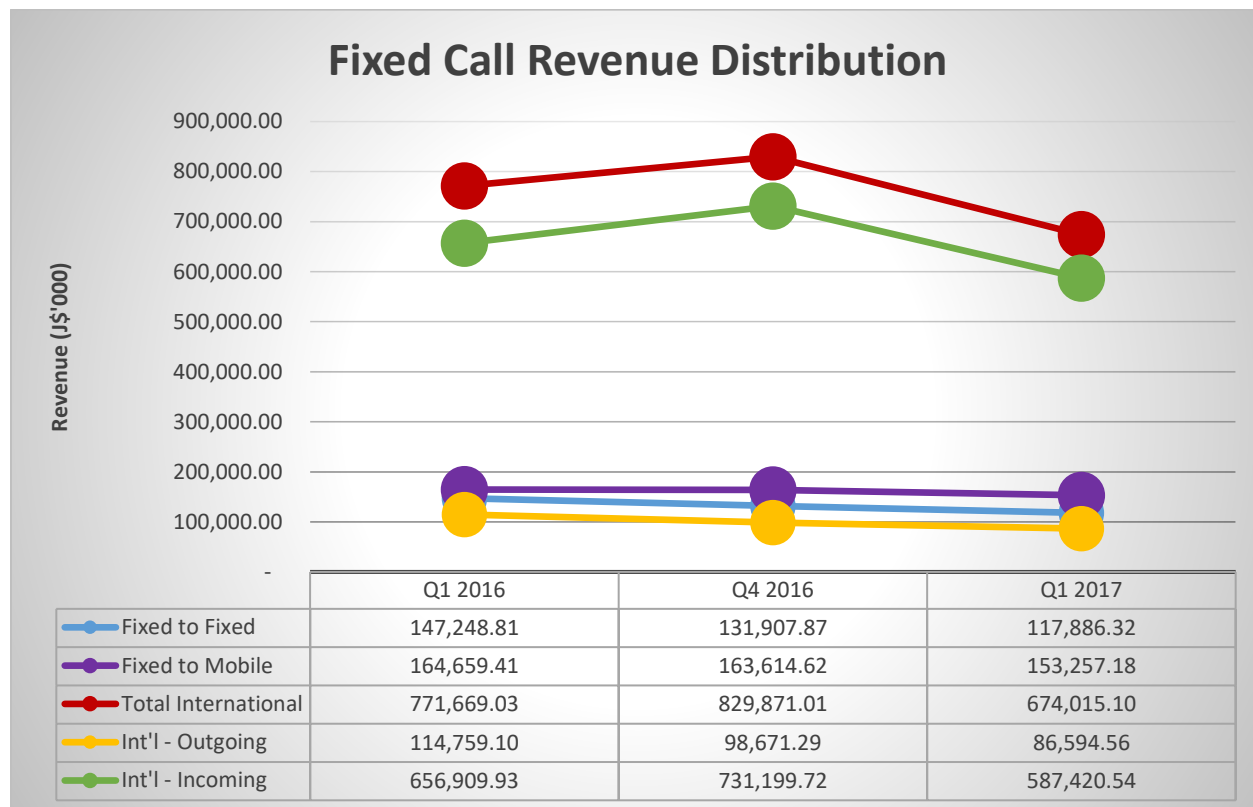
Figure 2: Fixed Call Minutes



% change: Q1 '17/Q4 '16

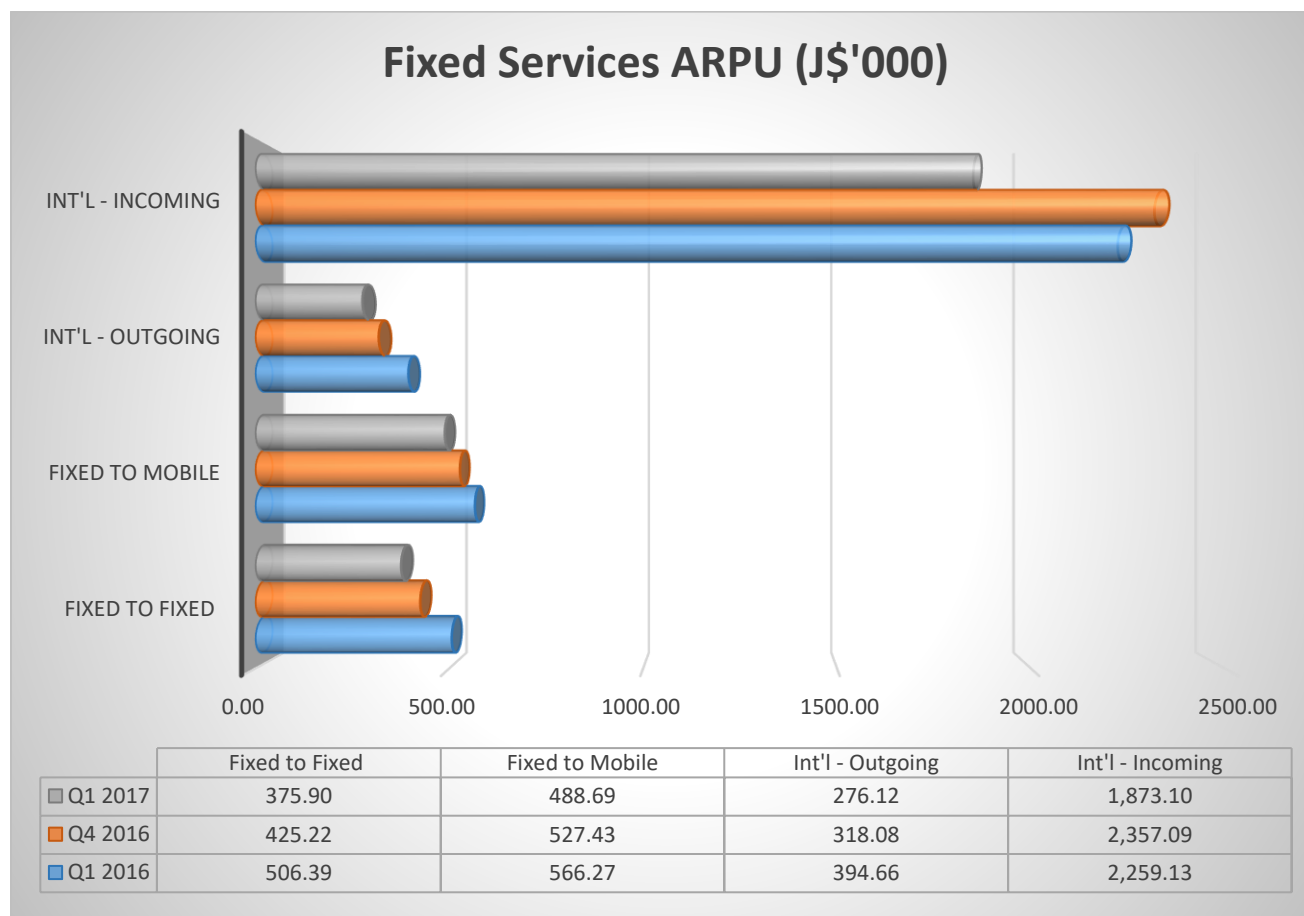
Fixed to Fixed:	-8.53%
Fixed to Mobile:	-15.08%
Total International:	-28.64%
Int'l - Outgoing:	-32.85%
Int'l - Incoming:	-27.22%

Figure 3: Fixed Call Revenue Distribution



% change Q1 '17/ Q4 '16	
Fixed to Fixed:	-10.63%
Fixed to Mobile:	-6.33%
Total International:	-18.78%
Int'l - Outgoing:	-12.24%
Int'l - Incoming:	-19.66%

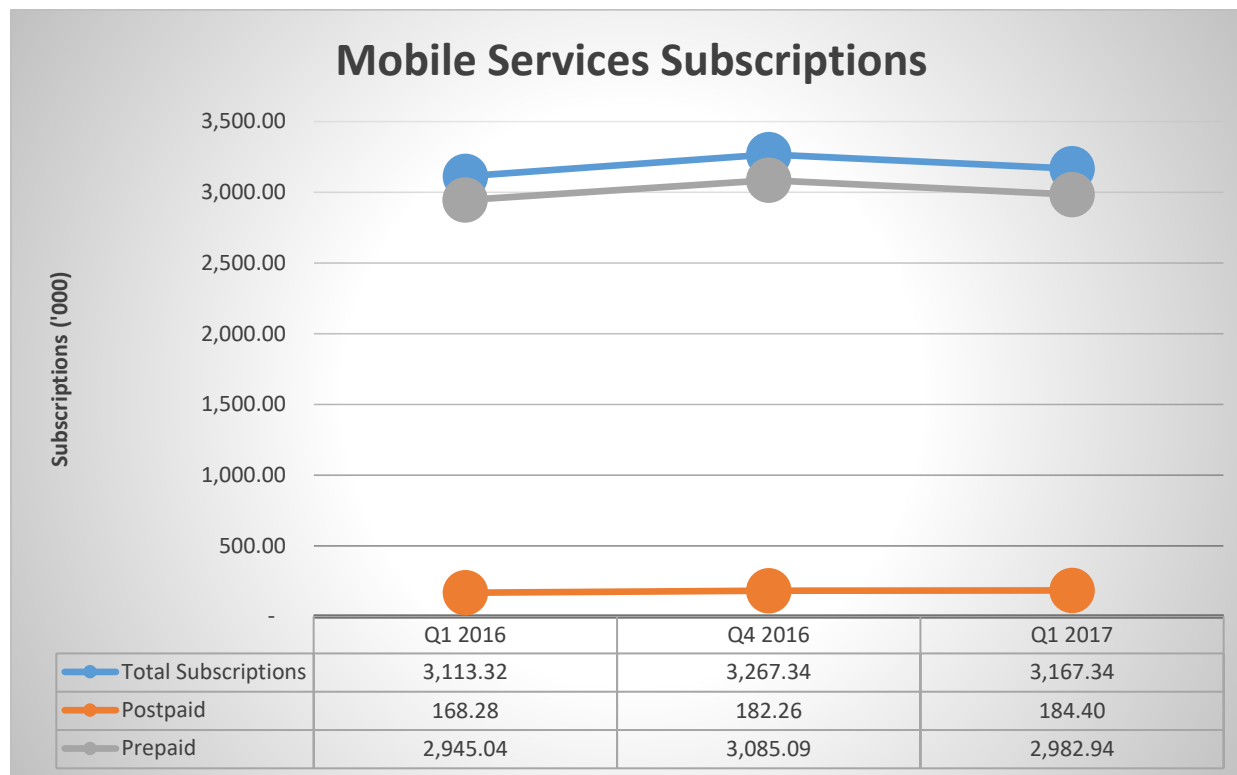
Figure 4: Fixed Services Average Revenue per User (ARPU)



% Change: Q1 '17/ Q4 '16	
Fixed to Fixed:	-11.60%
Fixed to Mobile:	-7.34%
Int'l - Outgoing:	-13.19%
Int'l - Incoming:	-20.53%

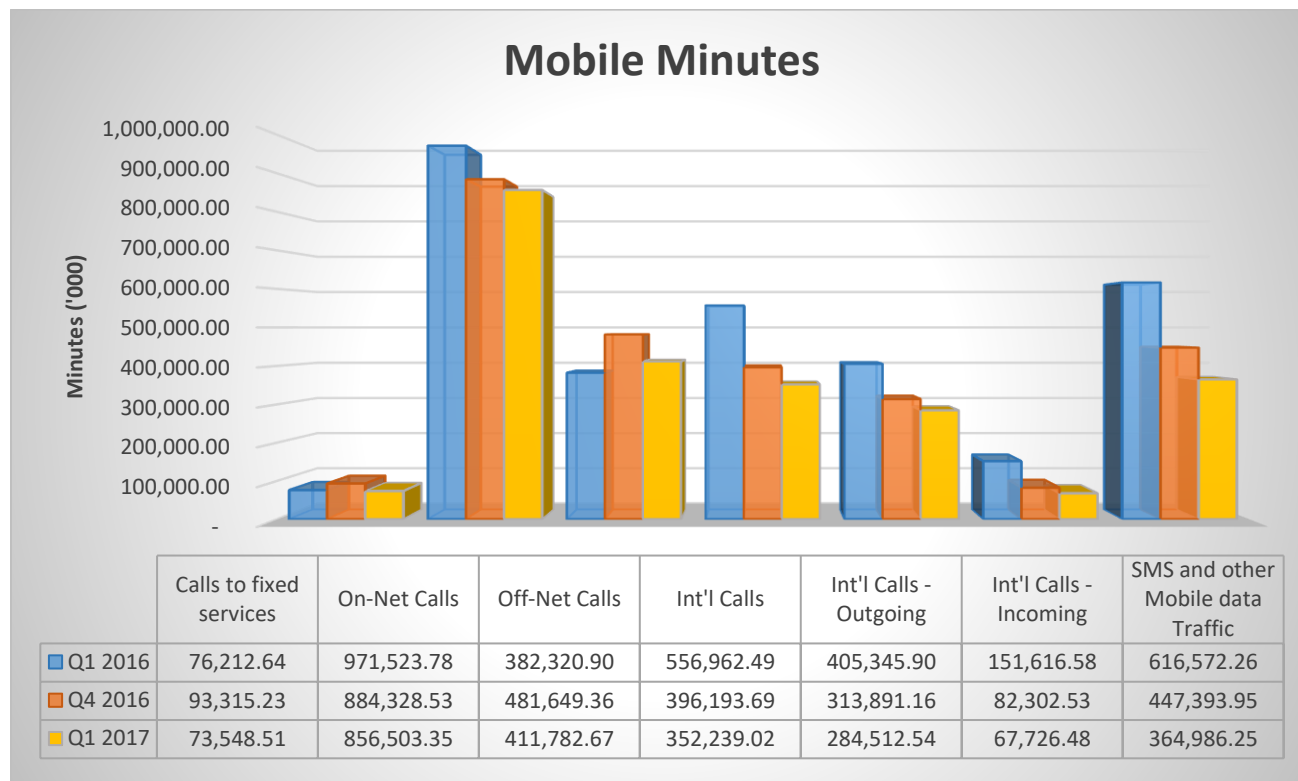
Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q1 '17/ Q4 '16	
Total Subscriptions:	-3.06%
Postpaid:	1.18%
Prepaid:	-3.31%

Figure 6: Mobile Minutes



% Change: Q1 '17/ Q4 '16

Calls to fixed services: -21.18%

On-Net Calls: -3.15%

Off-Net Calls: -14.51%

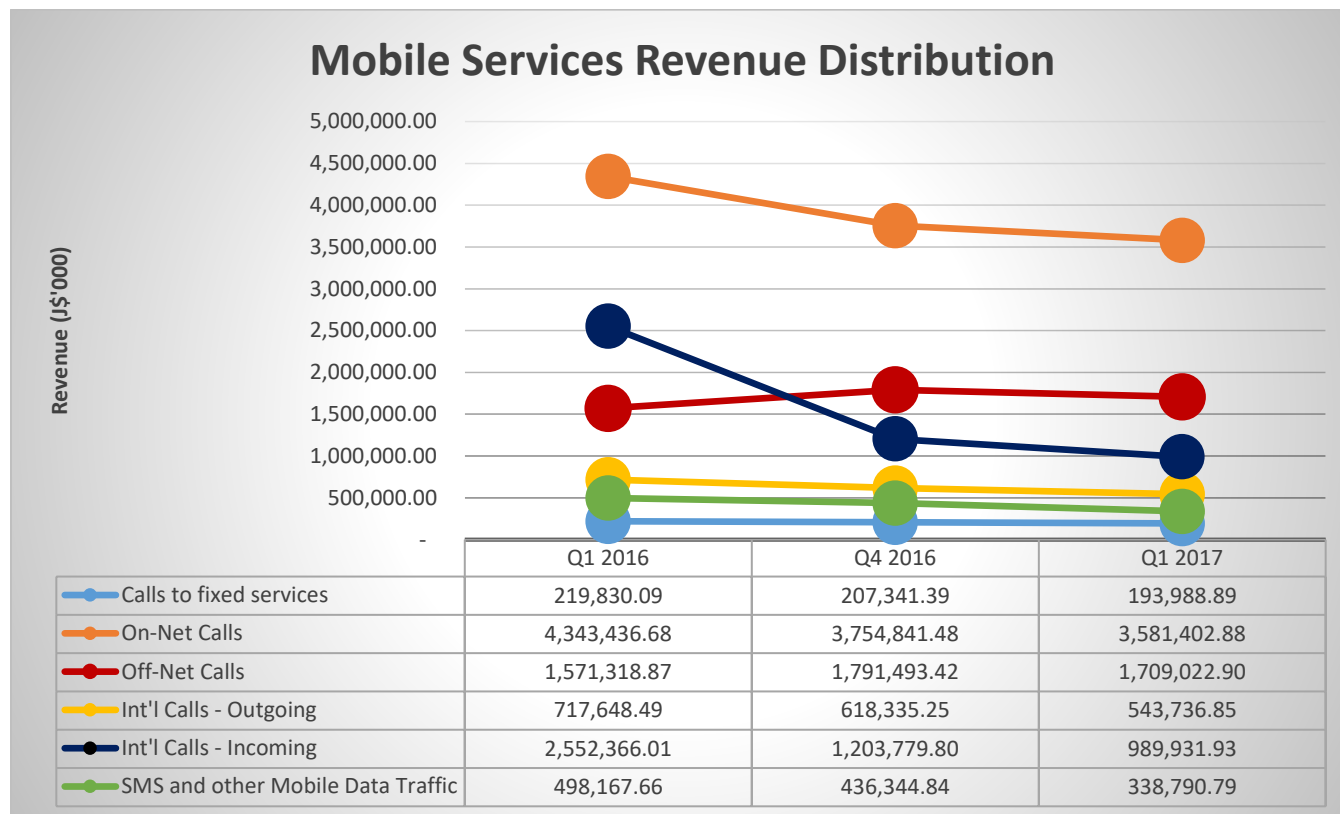
Int'l Calls: -11.09%

Int'l Calls – Outgoing: -9.36%

Int'l Calls – Incoming: -17.71%

SMS & other Mobile Data Traffic: -18.42%

Figure 7: Mobile Services Revenue Distribution



% Change: Q1 '17/ Q4 '16

Calls to Fixed services: -6.44%

On-Net Calls: -4.62%

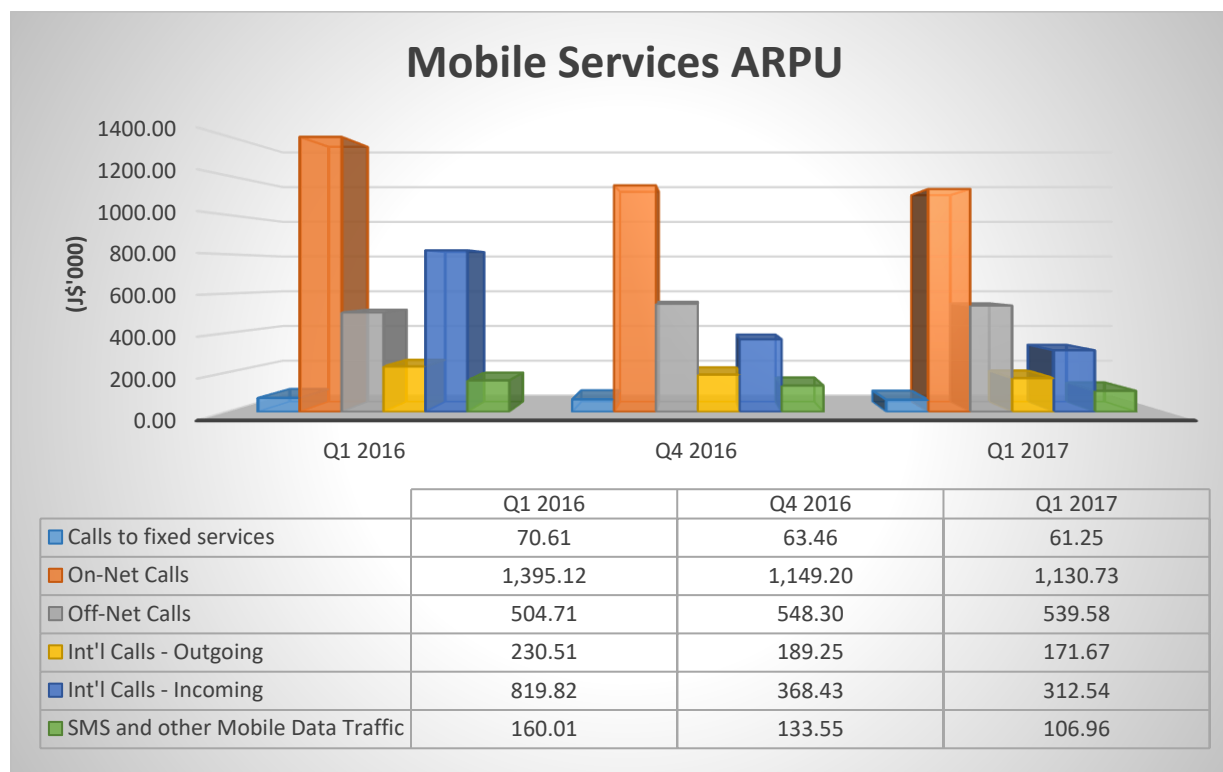
Off-Net Calls: -4.60%

Int'l Calls – Outgoing: -12.06%

Int'l Calls – Incoming: -17.76%

SMS & other Mobile Data
Traffic: -22.36%

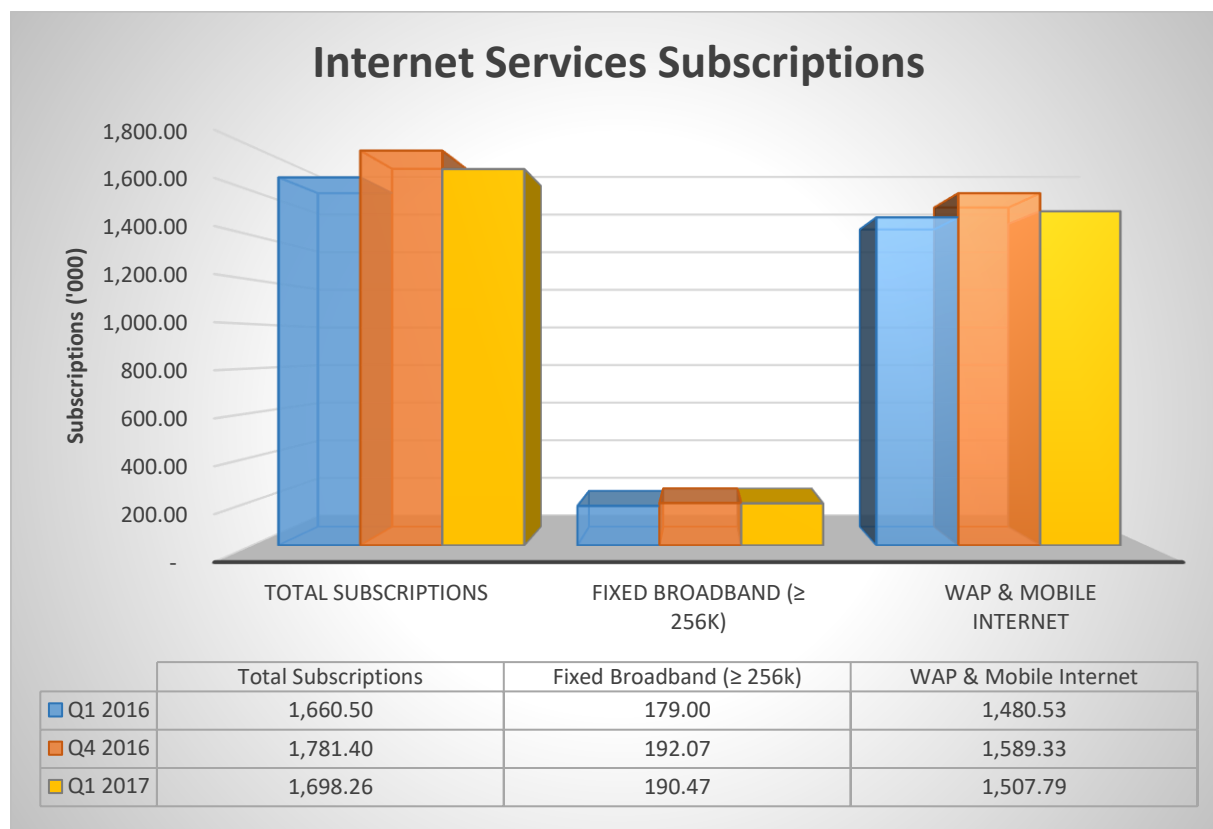
Figure 8: Mobile Services Average Revenue per User (ARPU)



<u>% Change Q1 '17/ Q4 '16</u>	
Calls to fixed service:	-3.49%
On-Net Calls:	-1.61%
Off-Net Calls:	-1.59%
Int'l Calls – Outgoing:	-9.29%
Int'l Calls – Incoming:	-15.17%
SMS & other Mobile Data Traffic:	-19.91%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q1 '17/ Q4 '16

Total Subscriptions: -4.67%

Fixed Broadband (≥ 256k): -0.84%

WAP & Mobile Internet: -5.13%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q1 2016	Q4 2016	Q1 2017
Fixed Subscription Penetration Rate	10.68%	11.39%	11.52%
Mobile Subscription Penetration Rate	114%	120%	116%
Fixed Broadband Subscription Penetration Rate	7%	7%	7%
Mobile Broadband Subscription Penetration Rate	54%	58%	55%
Total Broadband Subscription Penetration Rate	61%	65%	62%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q1 2016	Q4 2016	Q1 2017
Fixed HHI	7,997	7,038	7,027
Mobile HHI	5,789	5,749	5,705
Fixed Broadband HHI	5,020	5,000	5,005
Mobile Broadband HHI	6,578	6,184	6,190

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	Q1 2016	Q4 2016	Q1 2017	% Change Q1'17/Q4'16	% Change Q1'17/Q1 '16
Total Subscriptions ('000)	290.78	310.21	313.61	1.09	7.85
Fixed to Fixed ('000 minutes)	115,365.65	105,765.87	96,740.16	-8.53	-16.14
Fixed to Mobile Calls ('000 minutes)	79,924.45	89,621.41	76,113.22	-15.08	-4.77
Total International Calls ('000 minutes)	55,980.51	53,794.75	38,390.11	-28.64	-31.42
Outgoing International Calls ('000 minutes)	11,505.80	13,558.10	9,104.39	-32.85	-20.87
Incoming International Calls ('000 minutes)	44,474.70	40,236.64	29,285.73	-27.22	-34.15
Total Revenue (J\$' million)	2,180.05	2,291.93	2,184.35	-4.69	0.20

Mobile Market	Q1 2016	Q4 2016	Q1 2017	% Change Q1'17/Q4' 16	% Change Q1'17/Q1 '16
Total Subscriptions ('000)	3,113.32	3,267.34	3,167.34	-3.06	1.74
On-Net Calls ('000 minutes)	971,523.78	884,328.53	856,503.35	-3.15	-11.84
Off-Net Calls ('000 minutes)	382,320.90	481,649.36	411,782.67	-14.51	7.71
International calls	556,962.49	396,193.69	352,239.02	-11.09	-36.76
Outgoing International ('000 minutes)	405,345.90	313,891.16	284,512.54	-9.36	-29.81
Incoming International ('000 minutes)	151,616.58	82,302.53	67,726.48	-17.71	-55.33
SMS and other mobile data traffic	616,572.26	447,393.95	364,986.25	-18.42	-40.80
Total Revenue (J\$ ' million)	14,192.33	12,871.34	12,476.71	-3.07	-12.09

Internet Market	Q1 2016	Q4 2016	Q1 2017	% Change Q1'17/Q4'16	% Change Q1'17/Q1 '16
Total Subscriptions ('000)	1,660.50	1,781.40	1,698.26	-4.67	2.27
Fixed Broadband (≥256K)	179.00	192.07	190.47	-0.84	6.41
WAP & Mobile Internet	1,480.53	1,589.33	1,507.79	-5.13	1.84
Total Revenue (J\$' million)	4,951.76	5,727.17	5,979.58	4.41	20.76

Penetration Rate	Q1 2016	Q4 2016	Q1 2017
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Fixed Broadband HHI	5,020	5,000	5,005
Mobile Broadband HHI	6,578	6,184	6,190