
Office of Utilities Regulation

Telecommunications Market Information Report July - September 2016



OFFICE OF UTILITIES REGULATION

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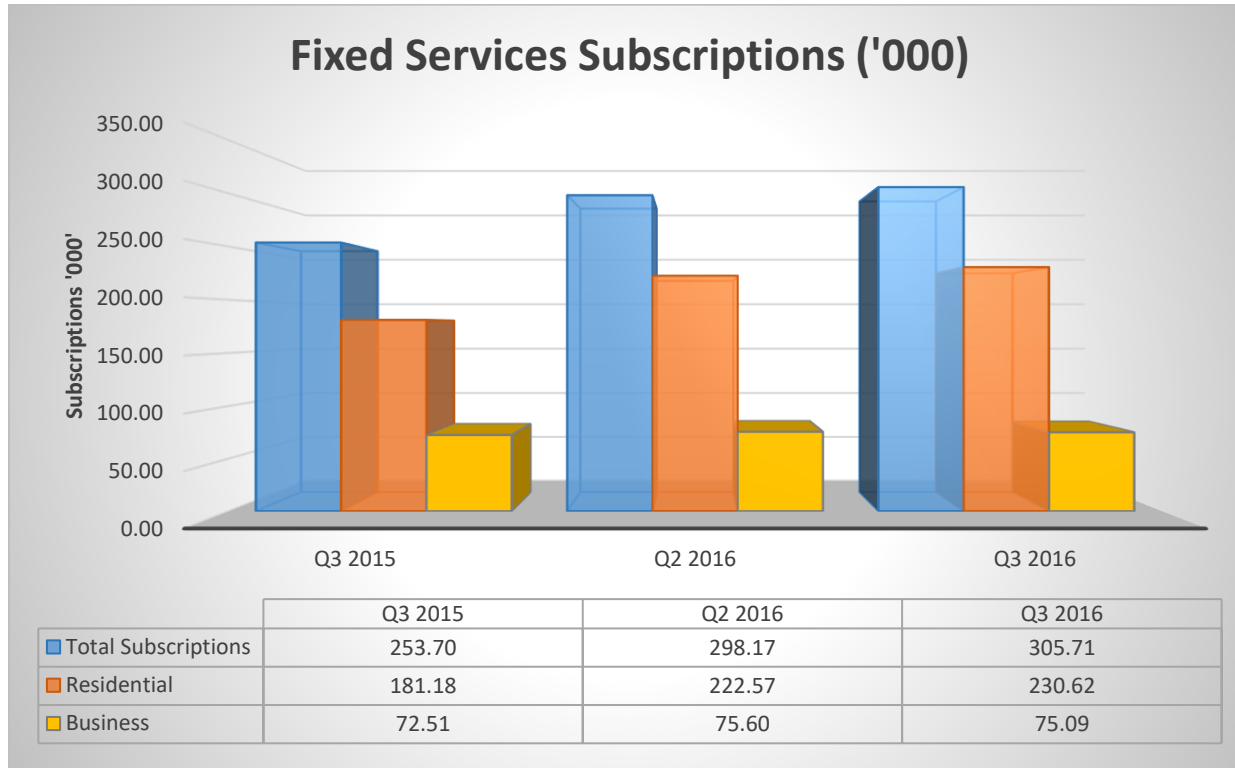
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Fixed Market Data

Figure 1 Fixed Services Subscriptions



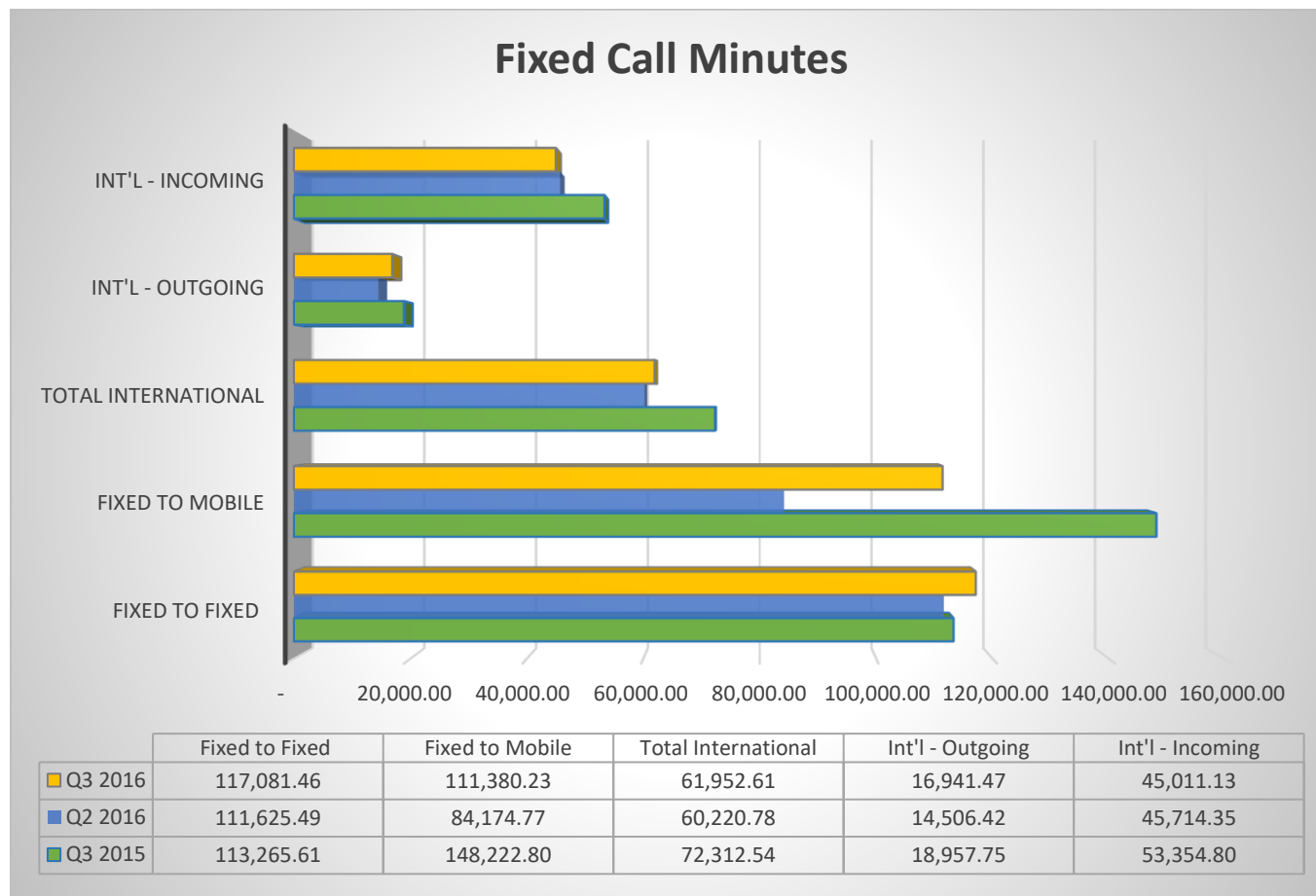
% Change: Q3 '16/ Q2 '16

Total Subscriptions: 2.53%

Residential: 3.62%

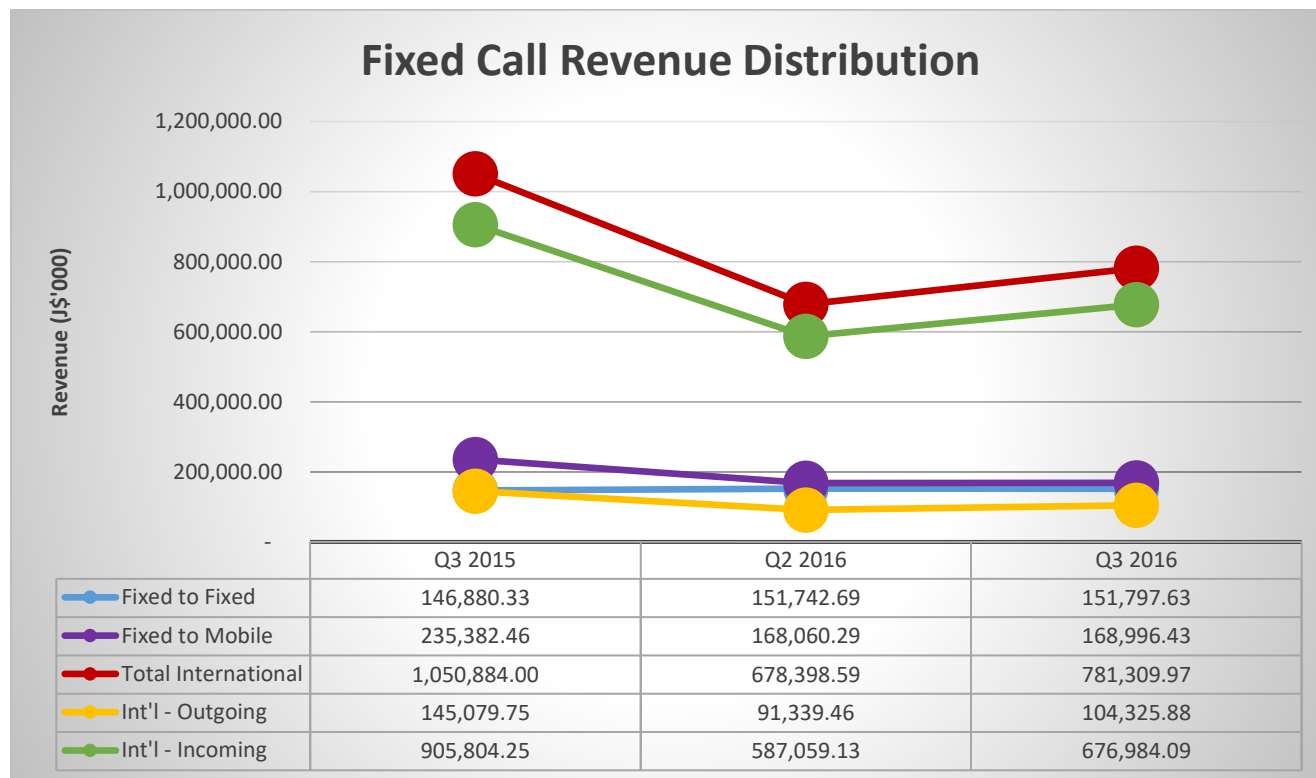
Business: -0.68%

Figure 2: Fixed Call Minutes



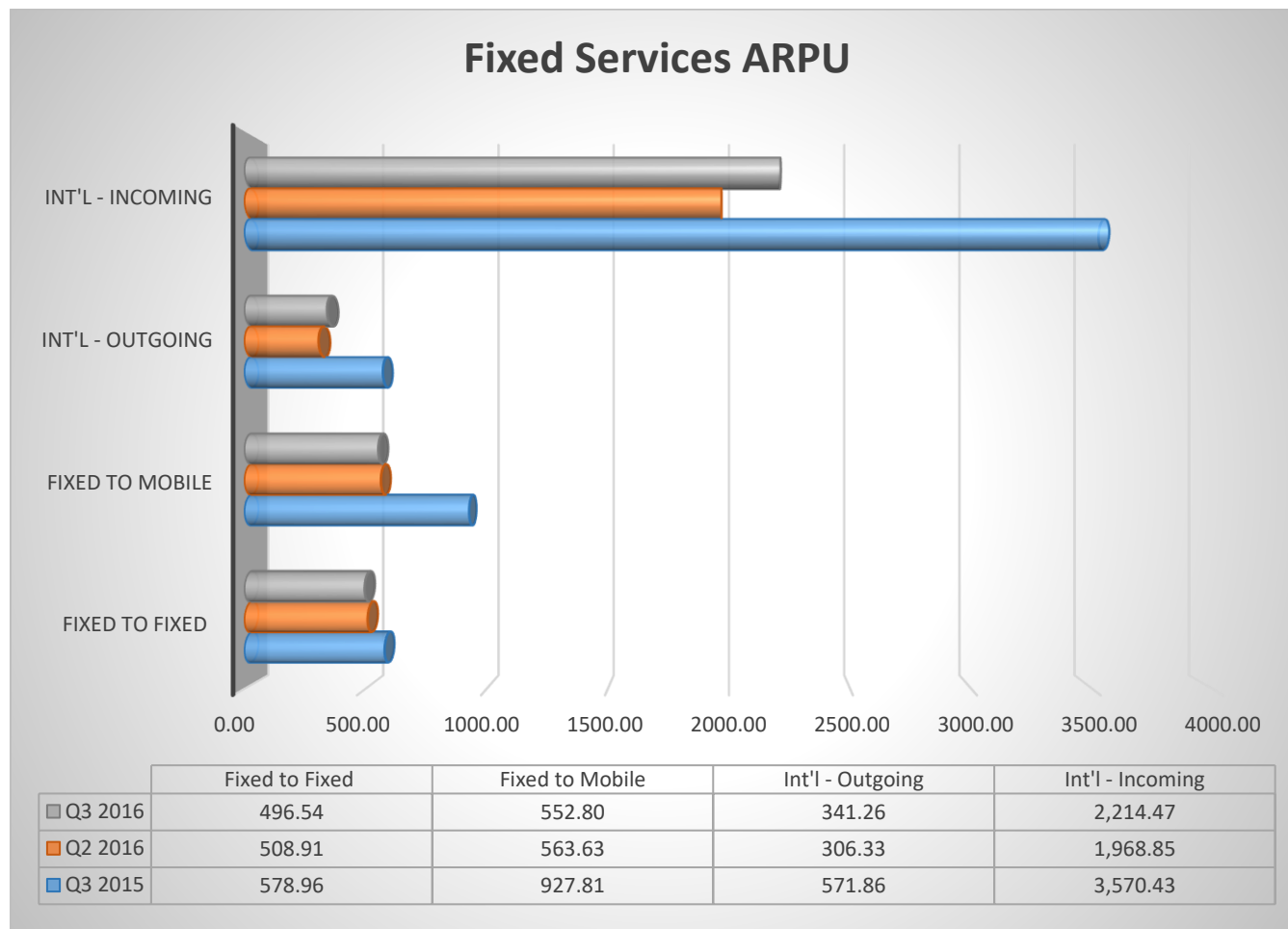
% change: Q3 '16/Q2 '16	
Fixed to Fixed:	4.89%
Fixed to Mobile:	32.32%
Total International:	2.88%
Int'l - Outgoing:	16.79%
Int'l - Incoming:	-1.54%

Figure 3: Fixed Call Revenue Distribution



<u>% change Q3 '16/ Q2 '16</u>	
Fixed to Fixed:	0.04%
Fixed to Mobile:	0.56%
Total International:	15.17%
Int'l - Outgoing:	14.22%
Int'l - Incoming:	15.32%

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



% Change: Q3 '16/ Q2 '16

Fixed to Fixed: -2.43%

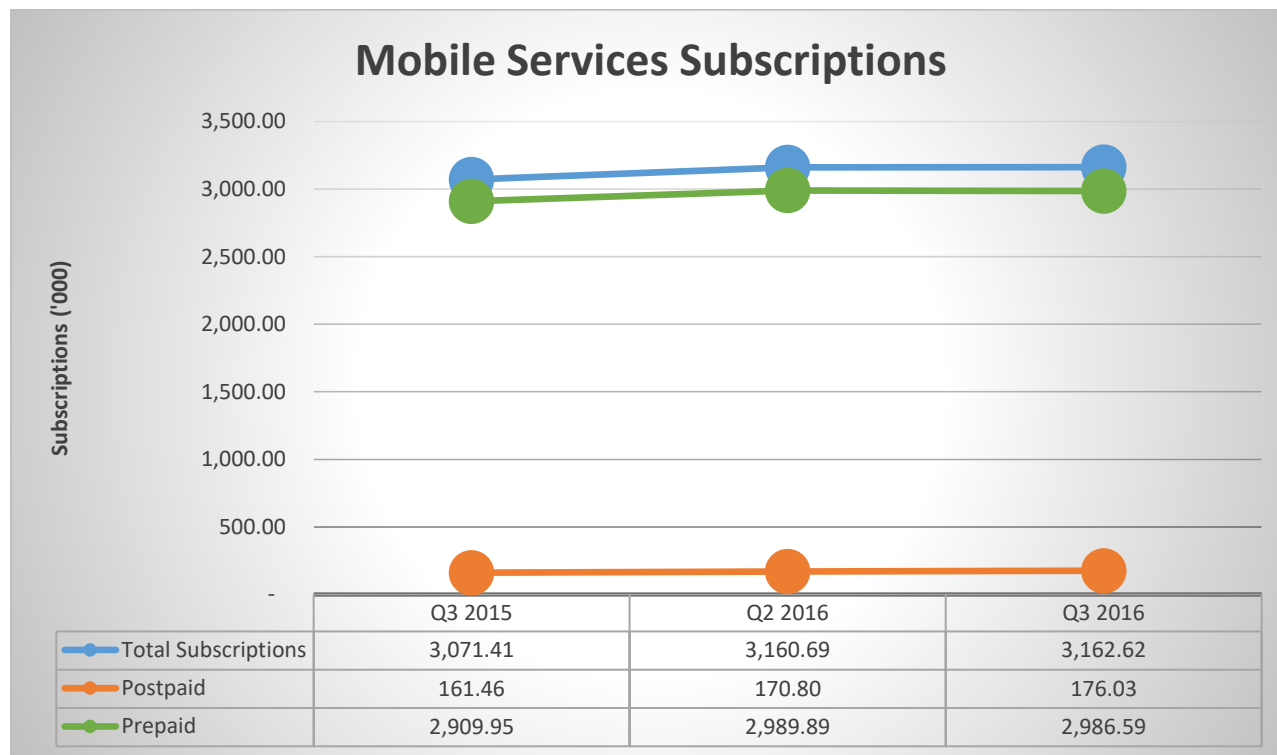
Fixed to Mobile: -1.92%

Int'l - Outgoing: 11.40%

Int'l - Incoming: 12.48%

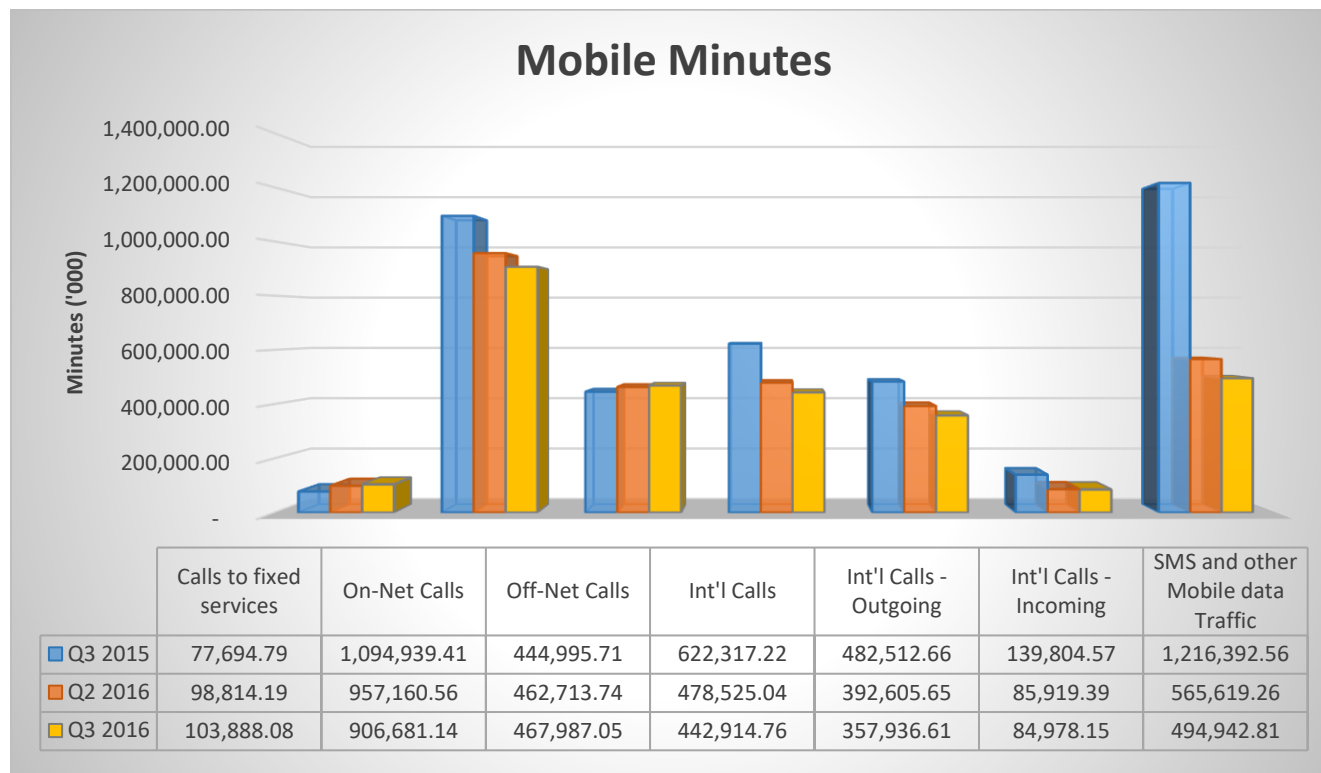
Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q3 '16/ Q2 '16	
Total Subscriptions:	0.06%
Postpaid:	3.06%
Prepaid:	- 0.11 %

Figure 6: Mobile Minutes



% Change: Q3 '16/ Q2 '16

Calls to fixed services: 5.13%

On-Net Calls: -5.27%

Off-Net Calls: 1.14%

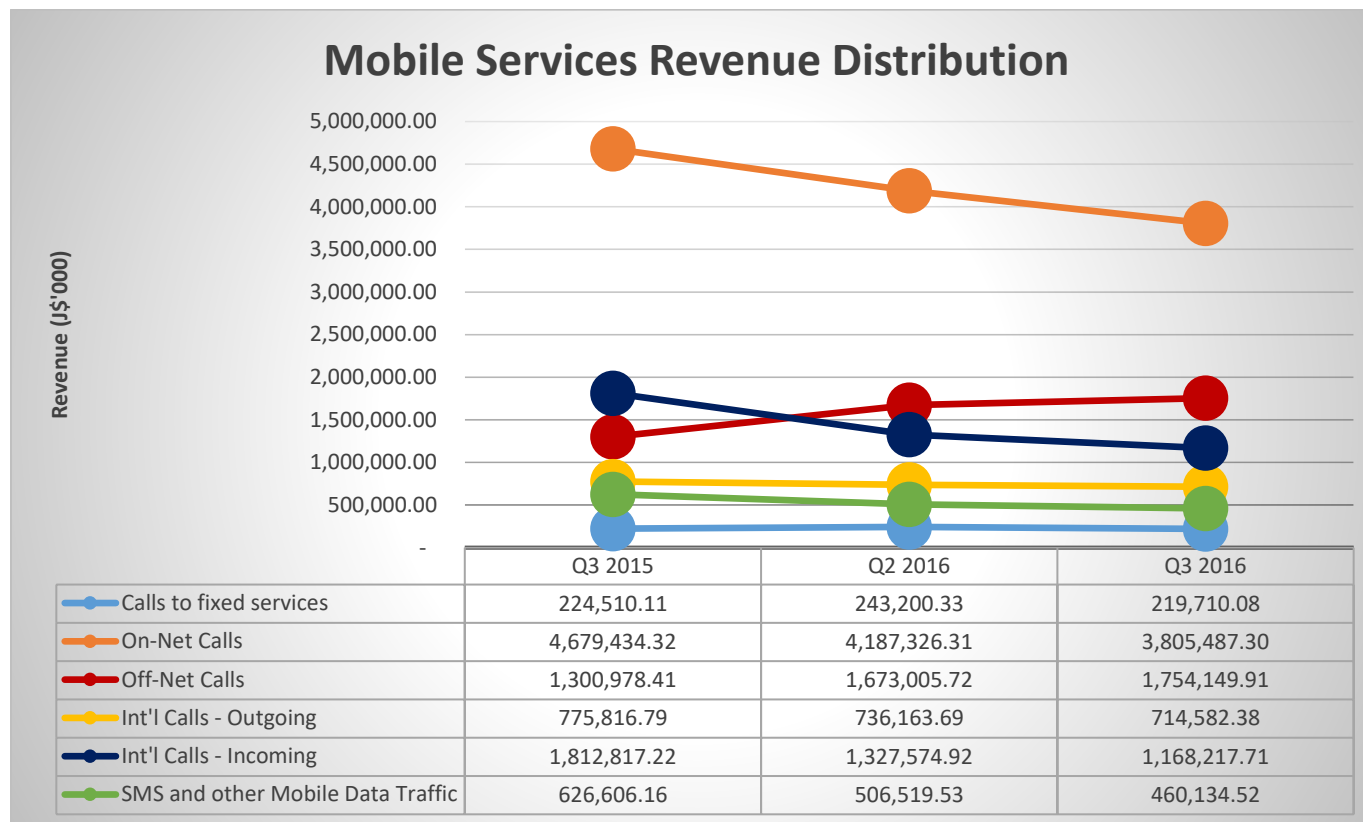
Int'l Calls: -7.44%

Int'l Calls – Outgoing: -8.83%

Int'l Calls – Incoming: -1.10%

SMS & other Mobile Data Traffic: -12.50%

Figure 7: Mobile Services Revenue Distribution



% Change: Q3 '16/ Q2 '16

Calls to Fixed services: -9.66%

On-Net Calls: -9.12%

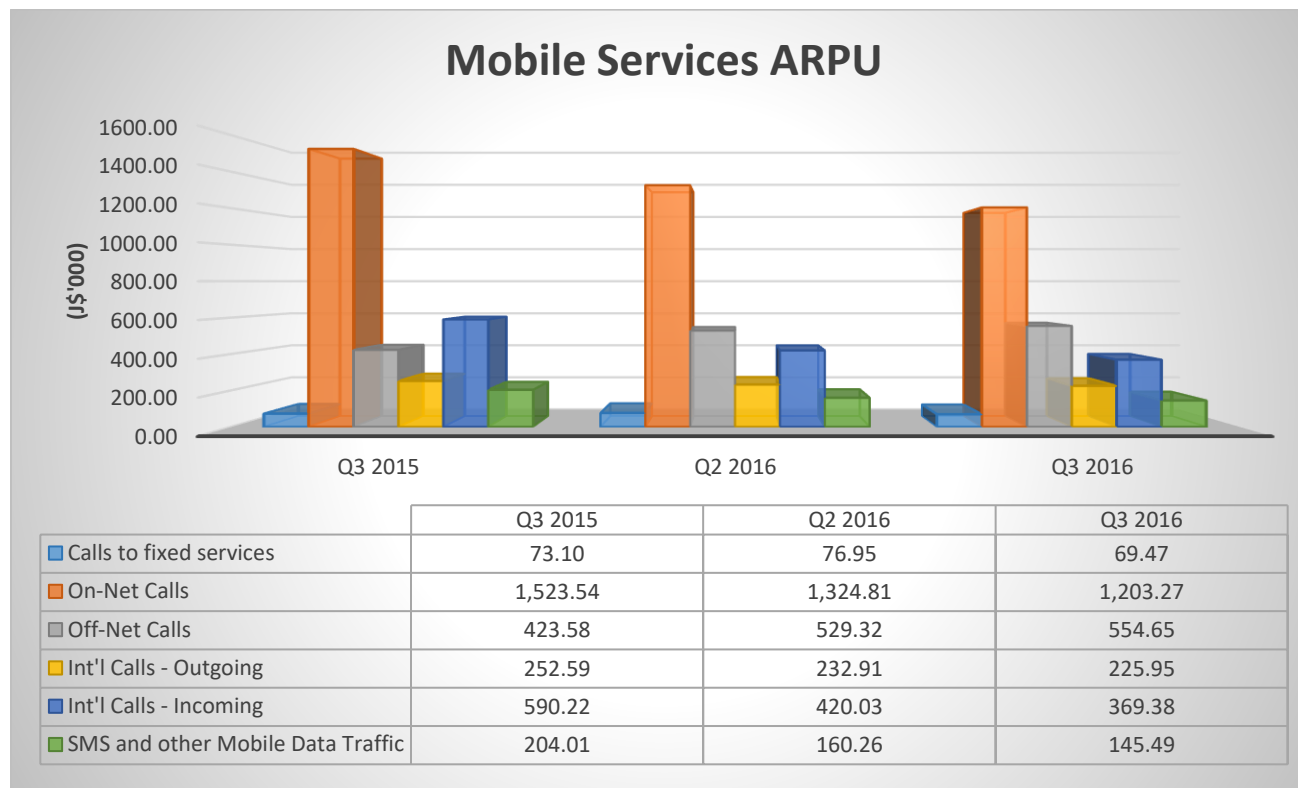
Off-Net Calls: 4.85%

Int'l Calls – Outgoing: -2.93%

Int'l Calls – Incoming: -12.00%

SMS & other Mobile Data
Traffic: -9.16%

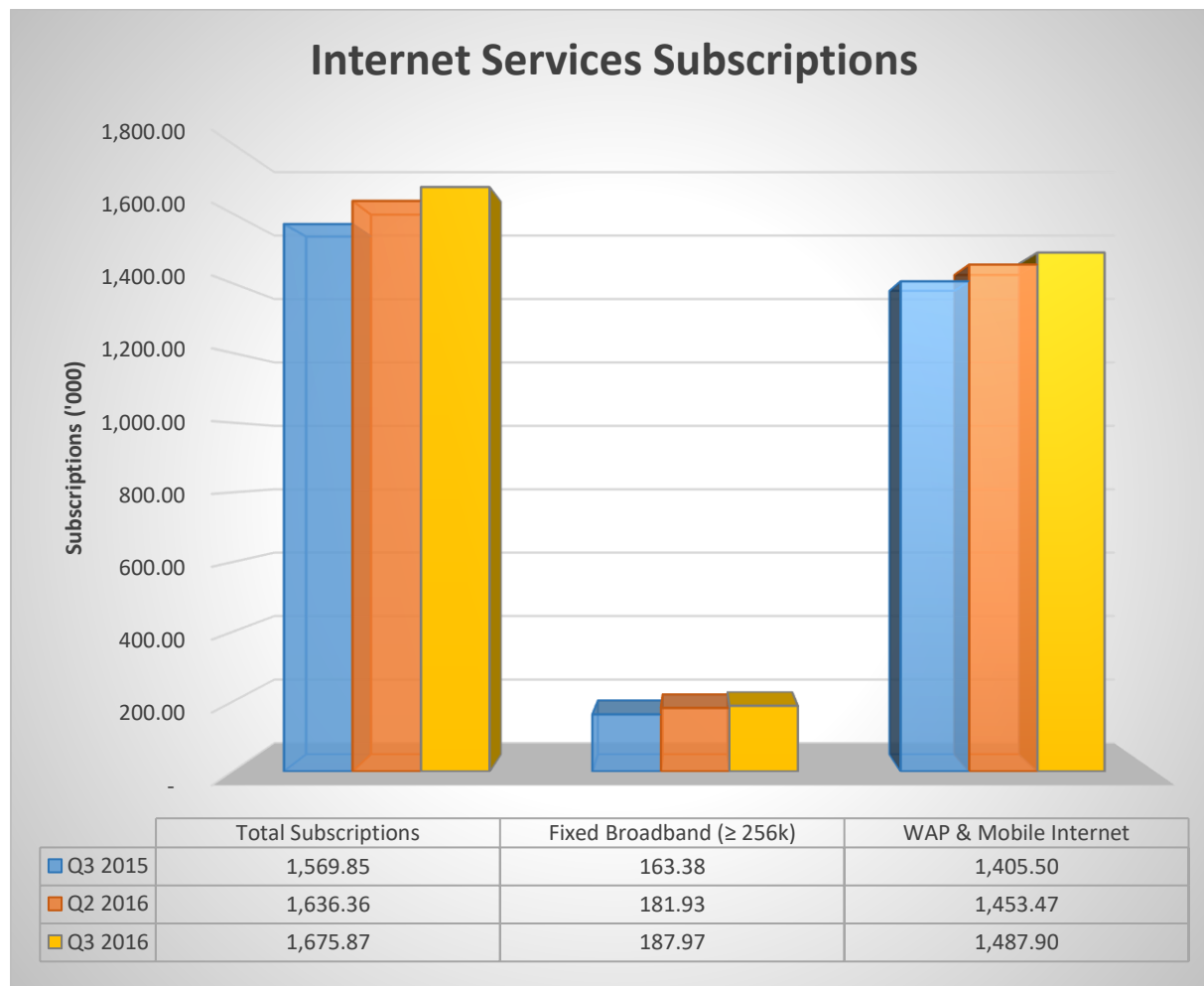
Figure 8: Mobile Services Average Revenue per User (ARPU)



% Change Q3 '16/ Q2 '16	
Calls to fixed service:	-9.71%
On-Net Calls:	-9.17%
Off-Net Calls:	4.79%
Int'l Calls – Outgoing:	-2.99%
Int'l Calls – Incoming:	-12.06%
SMS & other Mobile Data Traffic:	-9.21%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q3 '16/ Q2 '16

Total Subscriptions: 2.41%

Fixed Broadband (≥ 256k): 3.32%

WAP & Mobile Internet: 2.37%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q3 2015	Q2 2016	Q3 2016
Fixed Subscription Penetration Rate	9.32%	10.95%	11.23%
Mobile Subscription Penetration Rate	113%	116%	116%
Fixed Broadband Subscription Penetration Rate	6%	7%	7%
Mobile Broadband Subscription Penetration Rate	52%	53%	55%
Total Broadband Subscription Penetration Rate	58%	60%	62%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q3 2015	Q2 2016	Q3 2016
Fixed HHI	8,237	7,602	7,264
Mobile HHI	5,871	5,782	5,775
Fixed Broadband HHI	5,001	4,978	5,002
Mobile Broadband HHI	6,864	6,446	6,337

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	Q3 2015	Q2 2016	Q3 2016	% Change Q3'16/Q2'16	% Change Q3'16/Q3 '15
Total Subscriptions ('000)	253.70	298.17	305.71	2.53	20.50
Fixed to Fixed ('000 minutes)	113,265.61	111,625.49	117,081.46	4.89	3.37
Fixed to Mobile Calls ('000 minutes)	148,222.80	84,174.77	111,380.23	32.32	-24.86
Total International Calls ('000 minutes)	72,312.54	60,220.78	61,952.61	2.88	-14.33
Outgoing International Calls ('000 minutes)	18,957.75	14,506.42	16,941.47	16.79	-10.64
Incoming International Calls ('000 minutes)	53,354.80	45,506.42	45,011.13	-1.54	-15.64
Total Revenue (J\$' million)	2,568.08	2,110.93	2,296.04	8.77	-10.59

Mobile Market	Q3 2015	Q2 2016	Q3 2016	% Change Q3'16/Q2' 16	% Change Q3'16/Q3 '15
Total Subscriptions ('000)	3,071.41	3,160.69	3,162.62	0.06	2.97
On-Net Calls ('000 minutes)	1,094,939.41	957,160.56	906,681.14	-5.27	-17.19
Off-Net Calls ('000 minutes)	444,995.71	462,713.78	467,987.05	1.14	5.17
International calls	622,317.22	478,525.04	442,914.76	-7.44	-28.83
Outgoing International ('000 minutes)	482,512.66	392,605.65	357,936.61	-8.83	-25.82
Incoming International ('000 minutes)	139,804.57	85,919.39	84,978.15	-1.10	-39.22
SMS and other mobile data traffic	1,216,392.56	565,619.26	494,942.81	-12.50	-59.31
Total Revenue (J\$ ' million)	13,002.67	12,969.69	12,709.58	-2.01	-2.25

Internet Market	Q3 2015	Q2 2016	Q3 2016	% Change Q3'16/Q2'16	% Change Q3'16/Q3 '15
Total Subscriptions ('000)	1569.85	1,636.36	1,675.87	2.41	6.75
Fixed Broadband (≥256K)	163.38	181.93	187.97	3.32	15.05
WAP & Mobile Internet	1,405.50	1,453.47	1,487.90	2.37	5.86
Total Revenue (J\$' million)	4,544.54	5,074.14	5,325.15	4.95	17.18

Penetration Rate	Q3 2015	Q2 2016	Q3 2016
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