
Office of Utilities Regulation

Telecommunications Market Information Report October - December 2015



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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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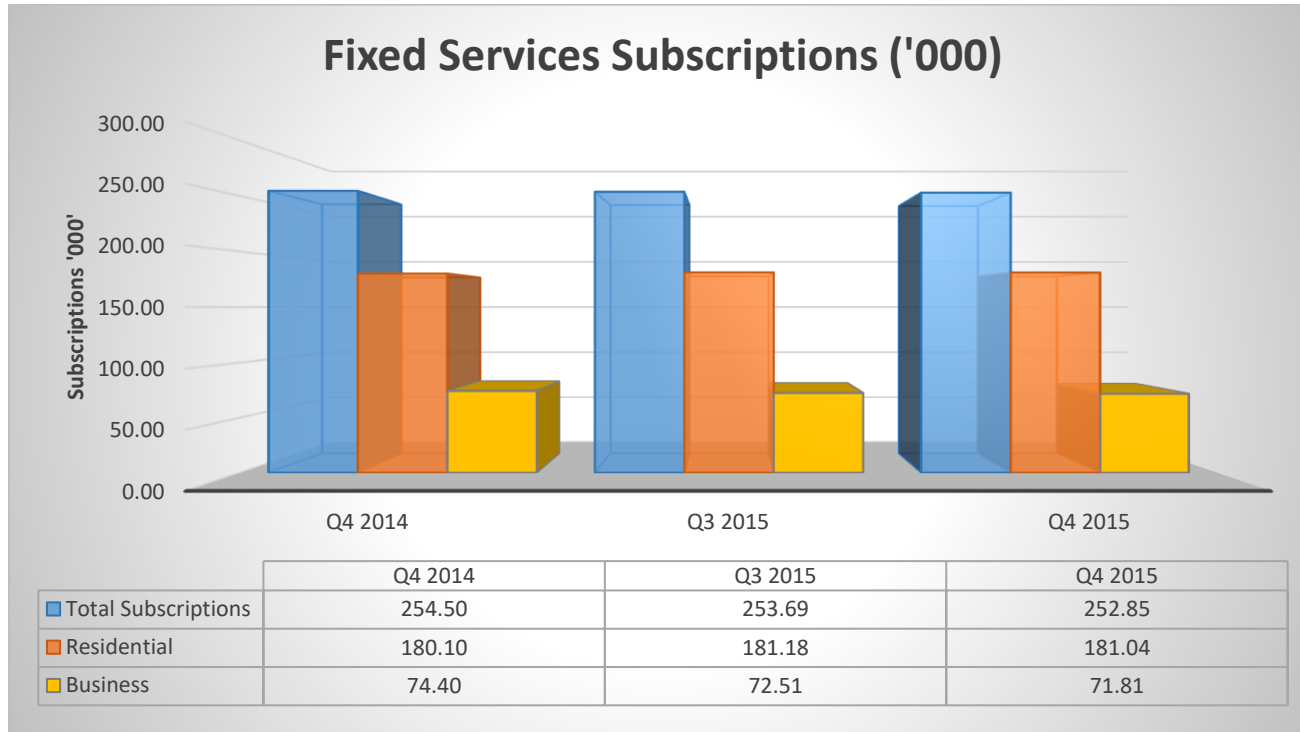
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Fixed Market Data

Figure 1 Fixed Services Subscriptions



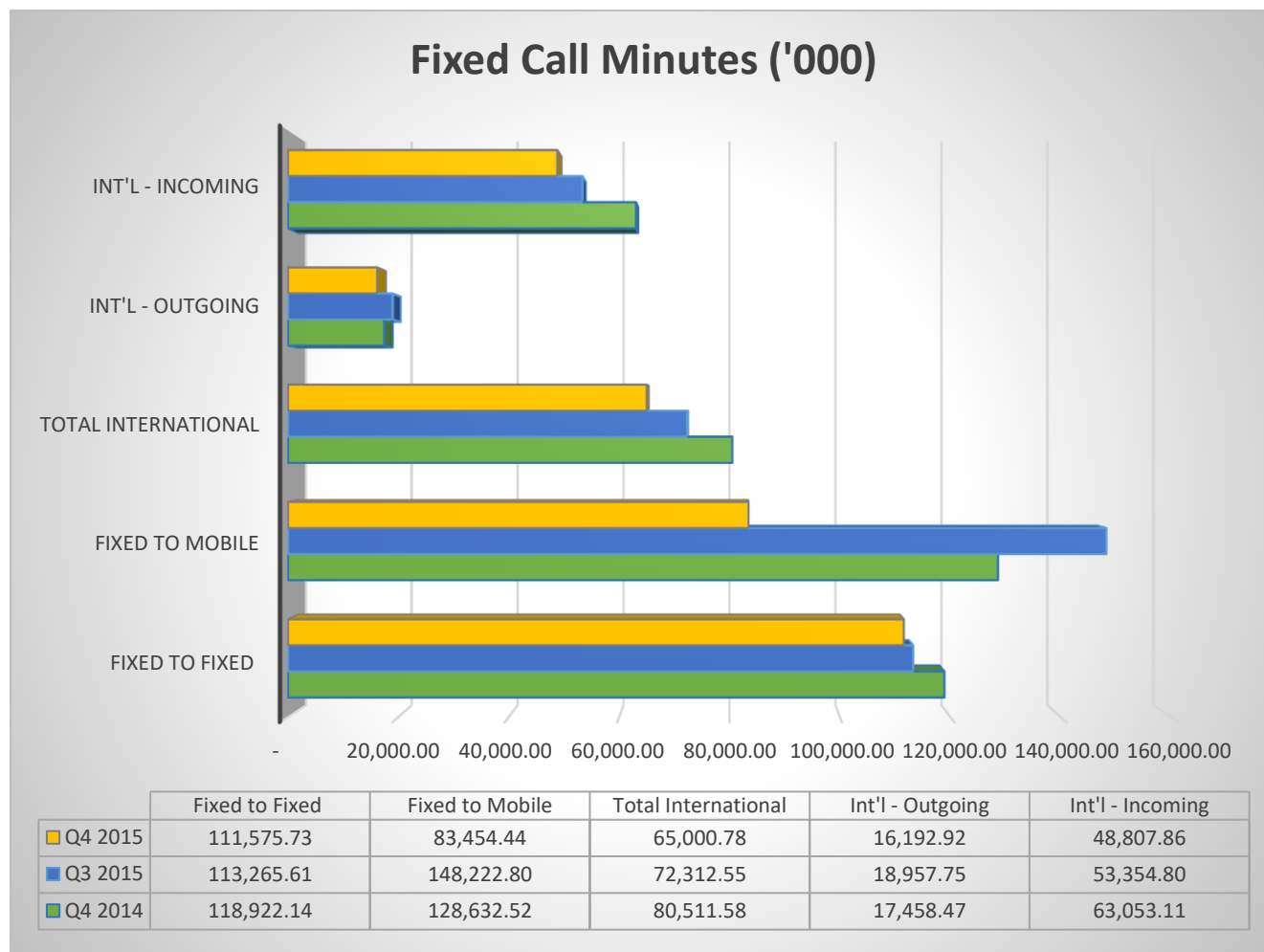
% Change: Q4 '15/ Q3 '15

Total Subscriptions: - 0.33%

Residential: - 0.08%

Business: - 0.97%

Figure 2: Fixed Call Minutes



% change: Q4 '15/Q3 '15

Fixed to Fixed: - 1.49%

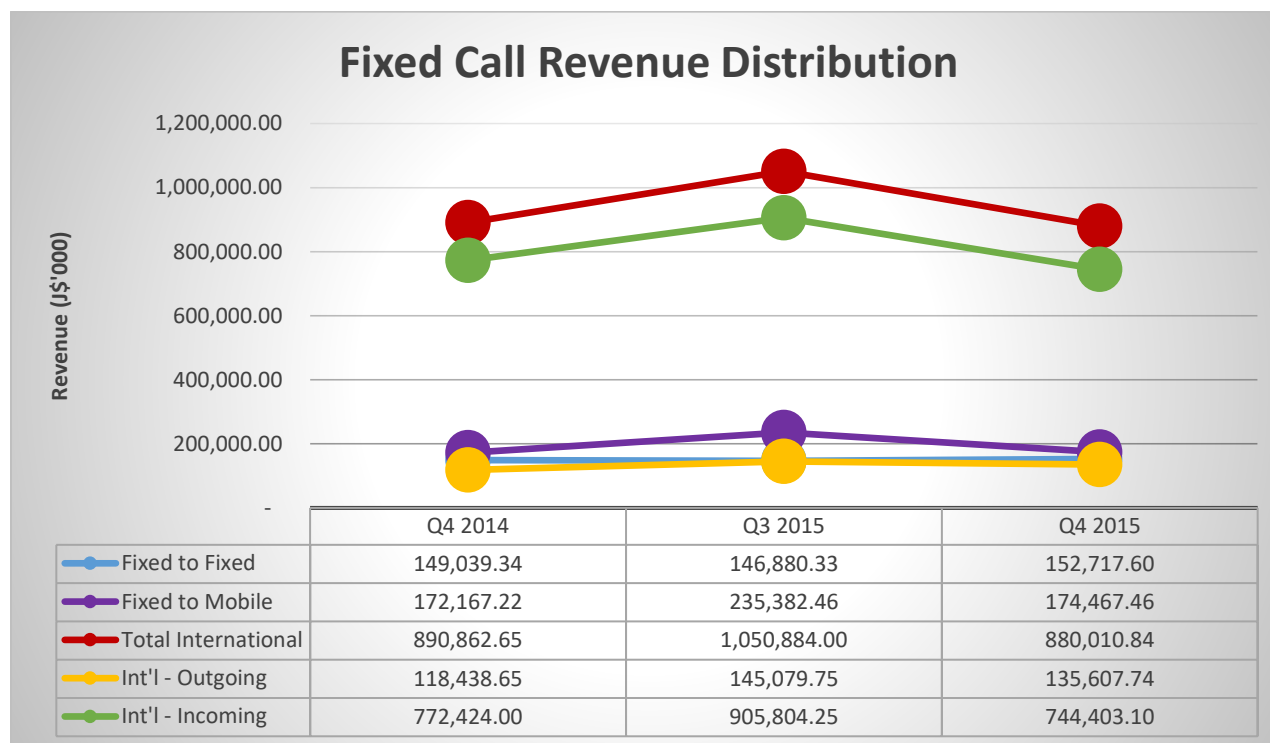
Fixed to Mobile: - 43.70%

Total International: - 10.11%

Int'l - Outgoing: -14.58%

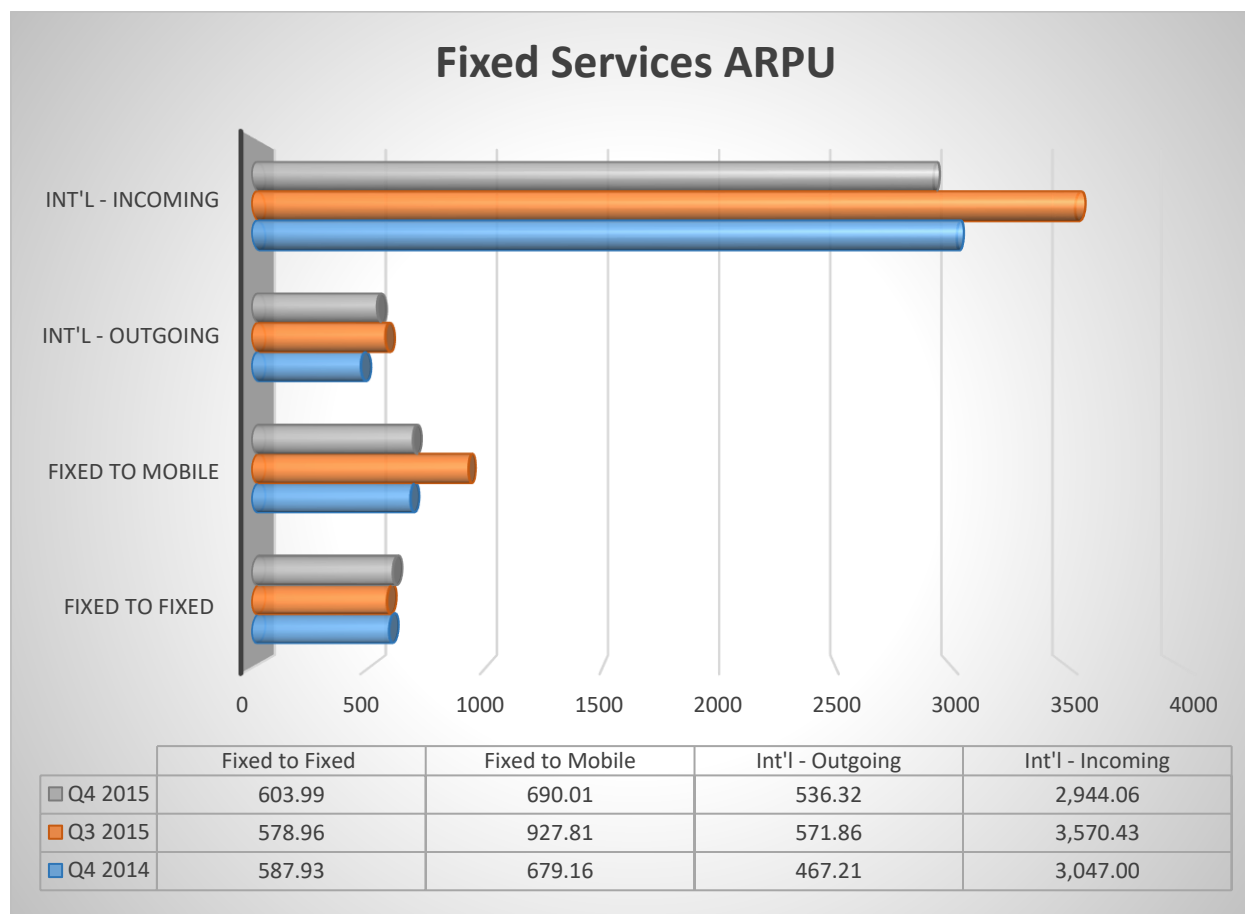
Int'l - Incoming: - 8.52%

Figure 3: Fixed Call Revenue Distribution



<u>% change Q4 '15/ Q3 '15</u>
Fixed to Fixed: 3.97%
Fixed to Mobile: -25.88%
Total International: -16.26%
Int'l - Outgoing: -6.53%
Int'l - Incoming: -17.82%

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



% Change: Q4 '15/ Q3 '15

Fixed to Fixed: 4.32%

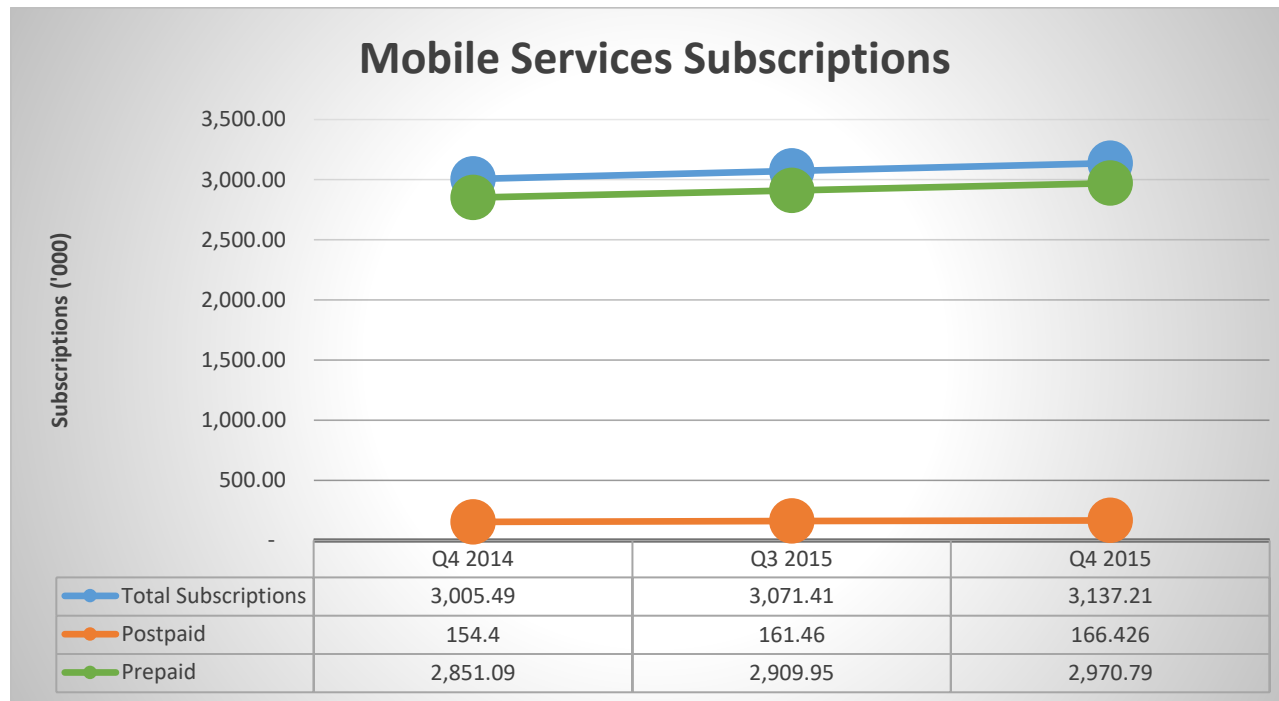
Fixed to Mobile: -25.63%

Int'l - Outgoing: -6.21%

Int'l - Incoming: -17.54%

Mobile Market Data

Figure 5: Mobile Services Subscriptions



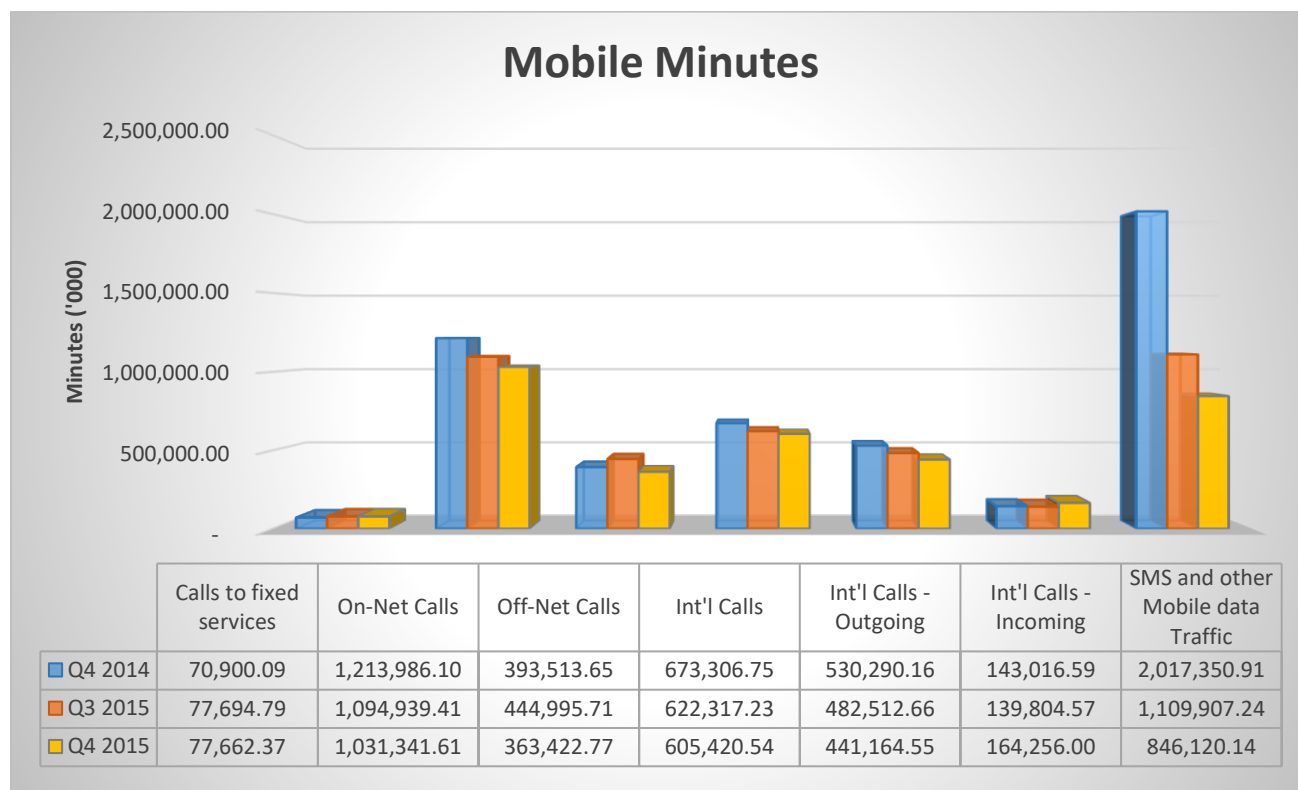
% Change: Q4 '15/ Q3 '15

Total Subscriptions: 2.14%

Postpaid: 3.08%

Prepaid: 2.09%

Figure 6: Mobile Minutes



% Change: Q4 '15/ Q3 '15

Calls to fixed services: - 0.04%

On-Net Calls: - 5.81%

Off-Net Calls: - 18.33%

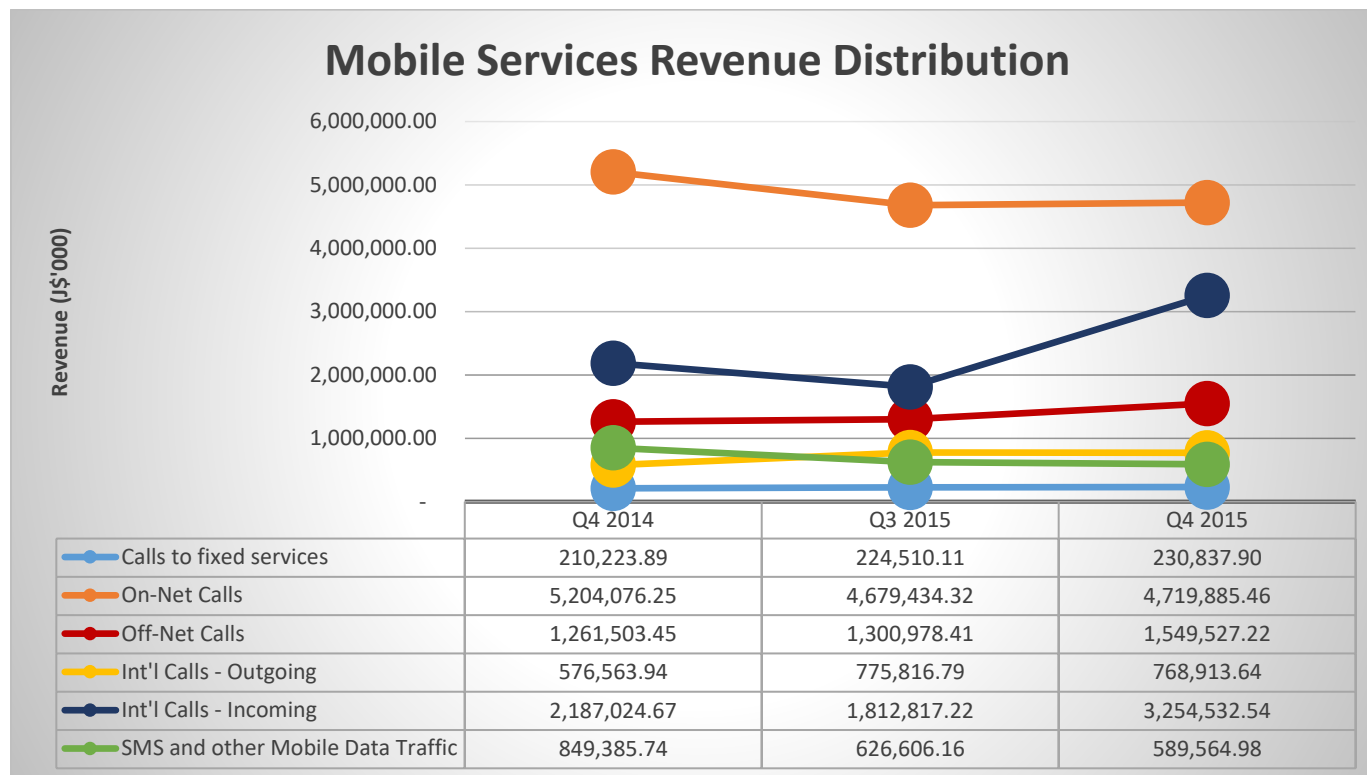
Int'l Calls: - 2.72%

Int'l Calls – Outgoing: - 8.57%

Int'l Calls – Incoming: 17.49%

SMS & other Mobile Data Traffic: - 23.77%

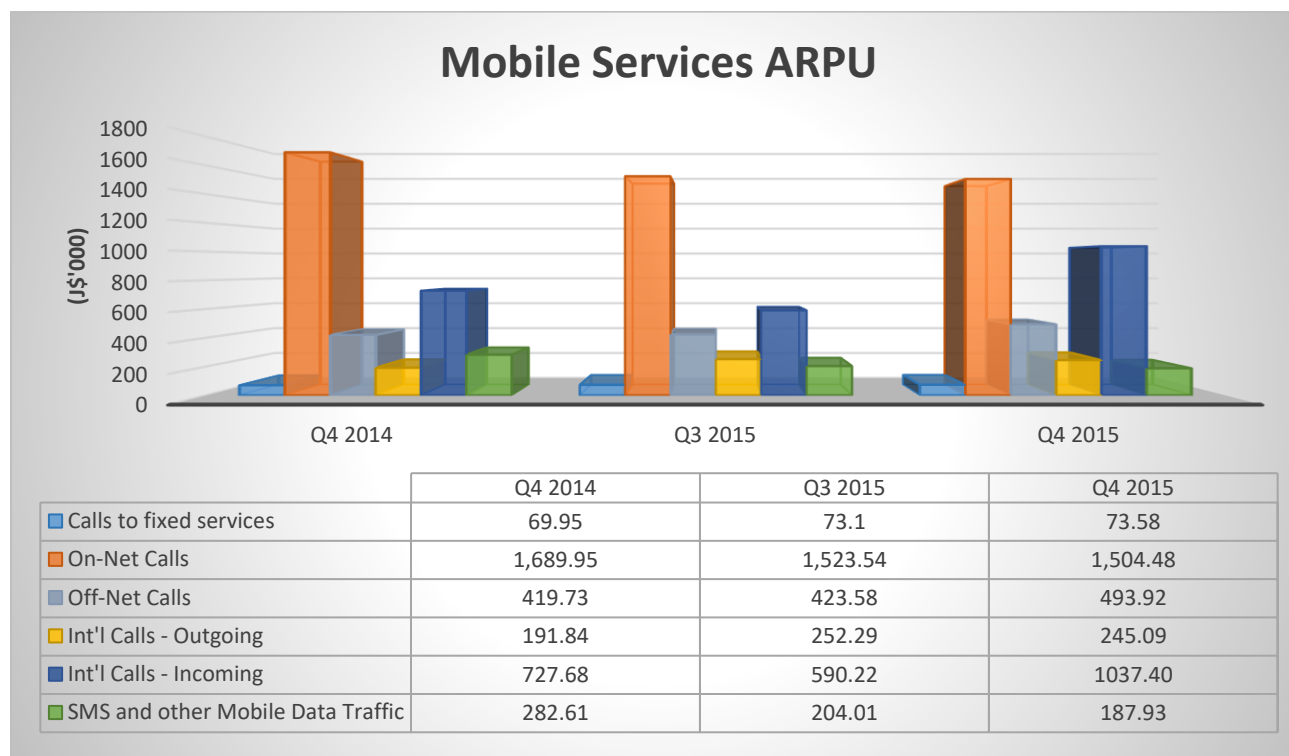
Figure 7: Mobile Services Revenue Distribution



% Change: Q4 '15/ Q3 '15

- Calls to Fixed services: 2.82%
- On-Net Calls: 0.86%
- Off-Net Calls: 19.10%
- Int'l Calls – Outgoing: - 0.89%
- Int'l Calls – Incoming: 79.53%
- SMS & other Mobile Data Traffic: - 5.91%

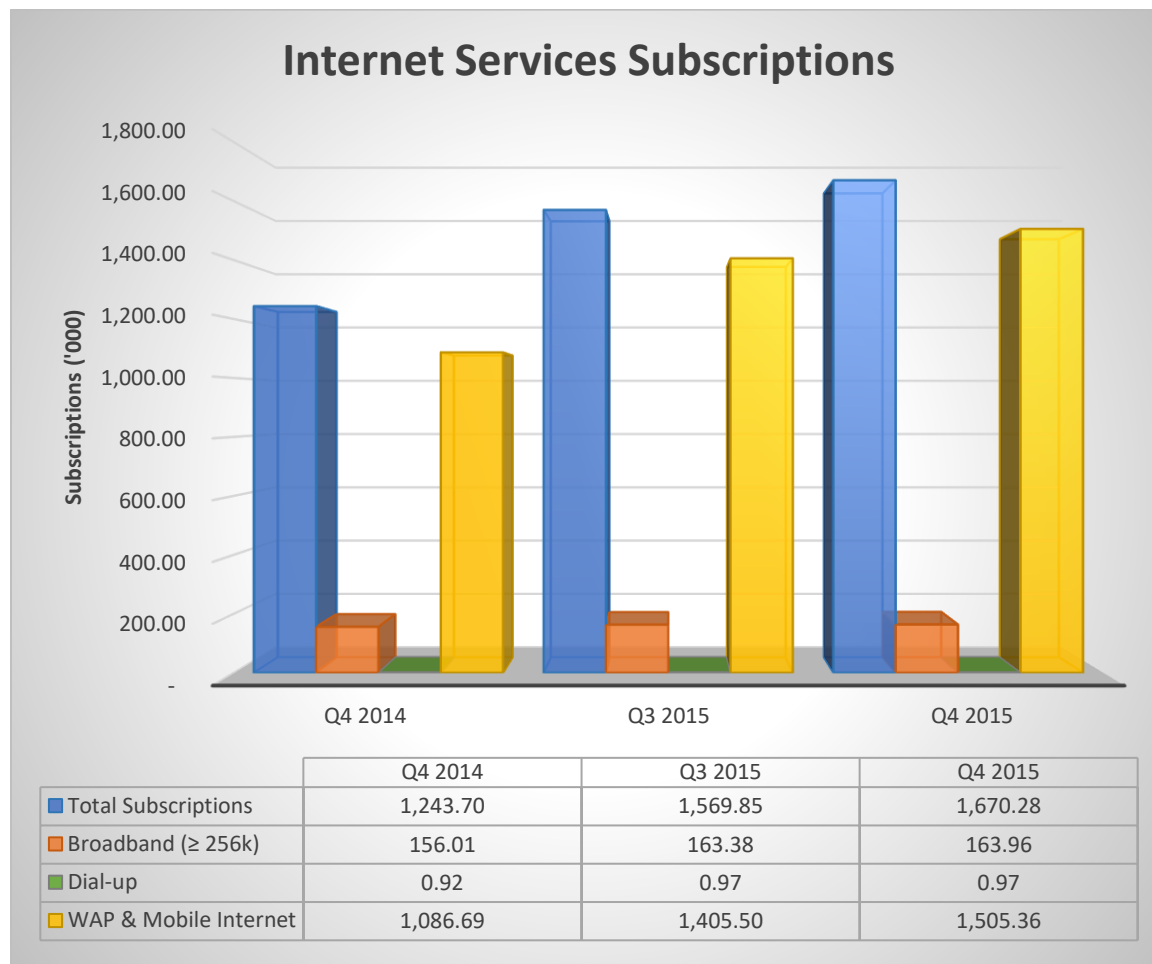
Figure 8: Mobile Services Average Revenue per User (ARPU)



<u>% Change Q4 '15/ Q3 '15</u>	
Calls to fixed service:	0.66%
On-Net Calls:	- 1.25%
Off-Net Calls:	16.61%
Int'l Calls – Outgoing:	- 2.85%
Int'l Calls – Incoming:	75.76%
SMS & other Mobile Data Traffic:	-7.88%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q4 '15/ Q3 '15

Total Subscriptions: 6.40%

Broadband (≥ 256k): 0.36%

Dial-up: 0%

WAP & Mobile Internet: 7.10%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q4 2014	Q3 2015	Q4 2015
Fixed Subscription Penetration Rate	9.31%	9.32%	9.28%
Mobile Subscription Penetration Rate	110%	113%	115%
Fixed Broadband Subscription Penetration Rate	6%	6%	6%
Mobile Broadband Subscription Penetration Rate	40%	52%	55%
Total Broadband Subscription Penetration Rate	46%	58%	61%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q4 2014	Q3 2015	Q4 2015
Fixed HHI	8,326	8,232	7,987
Mobile HHI	6,053	5,871	5,809
Fixed Broadband HHI	5,000	5,001	5,003
Mobile Broadband HHI	9,529	6,864	6,589

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	Q4 2014	Q3 2015	Q4 2015	% Change Q4'15/Q3'15	% Change Q4'15/Q4 '14
Total Subscriptions ('000)	254.50	253.69	252.85	- 0.33	-0.65
Fixed to Fixed ('000 minutes)	118,922.14	113,265.61	111,575.73	- 1.49	-6.18
Fixed to Mobile Calls ('000 minutes)	128,632.52	148,222.80	83,454.44	- 43.70	-35.12
Total International Calls ('000 minutes)	80,511.58	72,312.55	65,000.78	-10.11	-19.27
Outgoing International Calls ('000 minutes)	17,458.47	18,957.75	16,192.92	-14.58	-7.25
Incoming International Calls ('000 minutes)	63,053.11	53,354.80	48,807.86	- 8.52	-22.59
Total Revenue (J\$' million)	2,326.33	2,568.08	2,292.67	-10.72	-1.45

Mobile Market	Q4 2014	Q3 2015	Q4 2015	% Change Q4'15/Q3'15	% Change Q4'15/Q4 '14
Total Subscriptions ('000)	3,005.49	3,071.41	3,137.21	2.14	4.38
On-Net Calls ('000 minutes)	1,213,986.10	1,094,939.41	1,031,341.61	-5.81	-15.05
Off-Net Calls ('000 minutes)	393,513.65	444,995.71	363,422.77	-18.33	-7.65
International calls	673,306.75	622,317.22	605,420.54	-2.72	-10.08
Outgoing International ('000 minutes)	530,290.16	482,512.66	441,164.55	- 8.57	-16.81
Incoming International ('000 minutes)	143,016.59	139,804.57	164,256.00	17.49	14.85
SMS and other mobile data traffic	2,017,350.91	1,109,907.24	846,120.14	-23.77	-58.06
Total Revenue (J\$ ' million)	13,391.68	13,002.67	15,196.85	16.87	13.48

Internet Market	Q4 2014	Q3 2015	Q4 2015	% Change Q4'15/Q3'15	% Change Q4'15/Q4 '14
Total Subscriptions ('000)	1,243.70	1,569.84	1,670.28	6.40%	34.30
Broadband (≥256K)	156.01	163.38	163.96	0.36	5.10
Dial-up	0.92	0.97	0.97	0.00	5.43
WAP & Mobile Internet	1,086.69	1,405.50	1,505.36	7.10	38.53
Total Revenue (J\$' million)	3,616.92	4,544.54	4,808.34	5.80	32.94

Penetration Rate	Q4 2014	Q3 2015	Q4 2015
Fixed Subscription Penetration Rate	9.31%	9.32%	9.28%
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Fixed Broadband Subscription Penetration Rate	6%	6%	6%
Mobile Broadband Subscription Penetration Rate	40%	52%	55%
Total Broadband Subscription Penetration Rate	46%	58%	61%

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