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# Office of Utilities Regulation

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## Telecommunications Market Information Report January to December 2014

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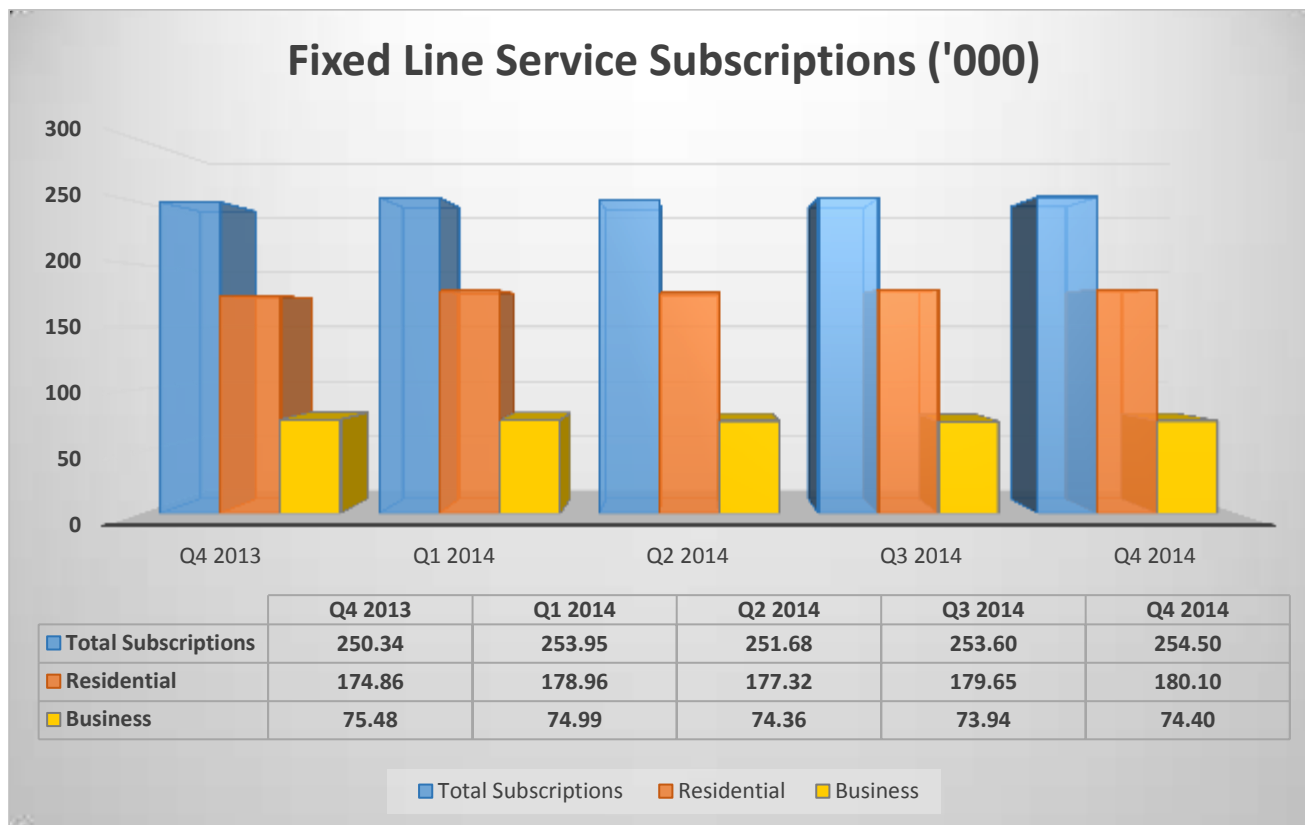


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# Fixed Line Data

Figure 1: Fixed Line Service Subscriptions



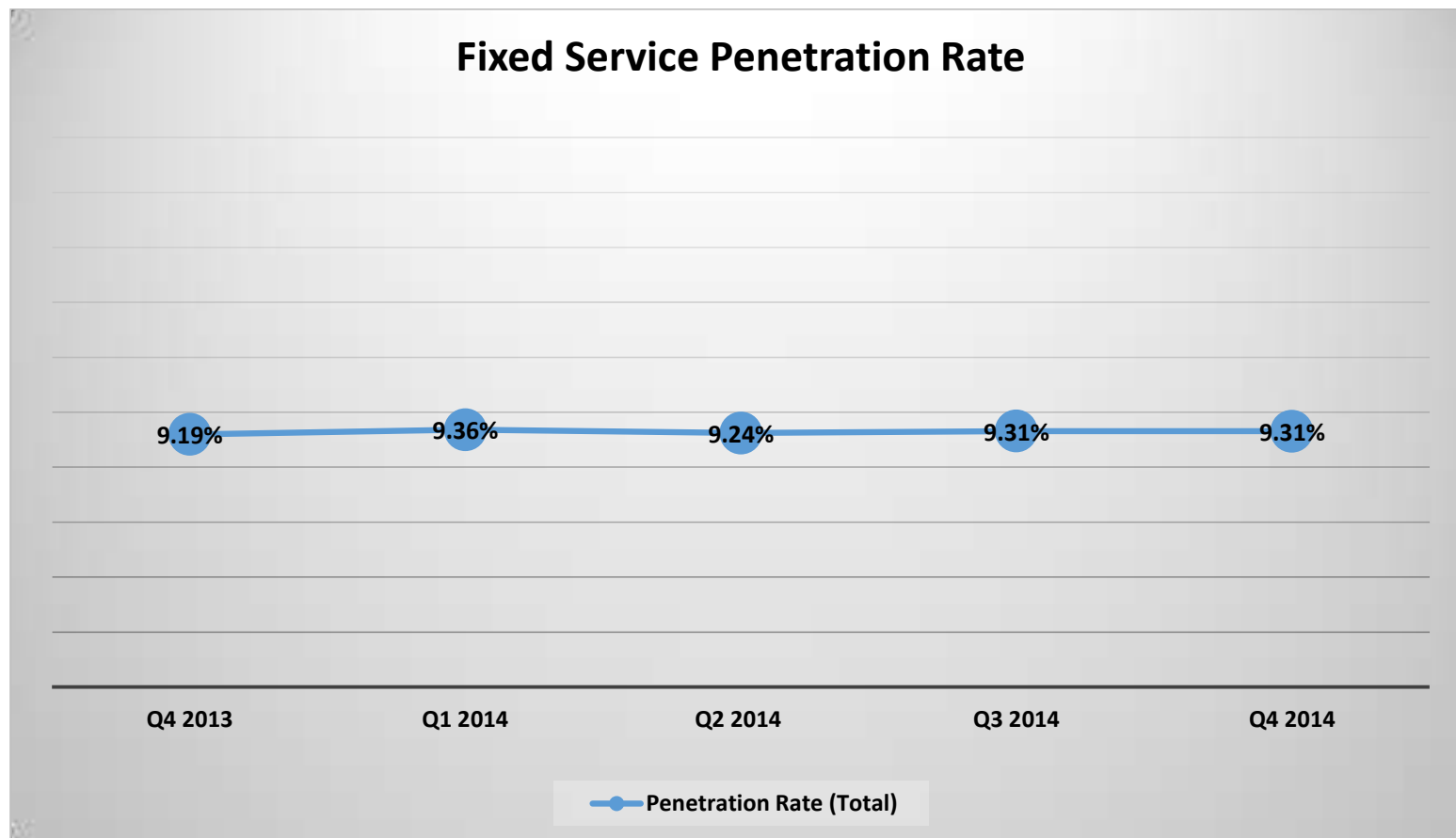
**Year on Year Percentage Change**

Total Subscriptions: 1.6%

Residential: 3%

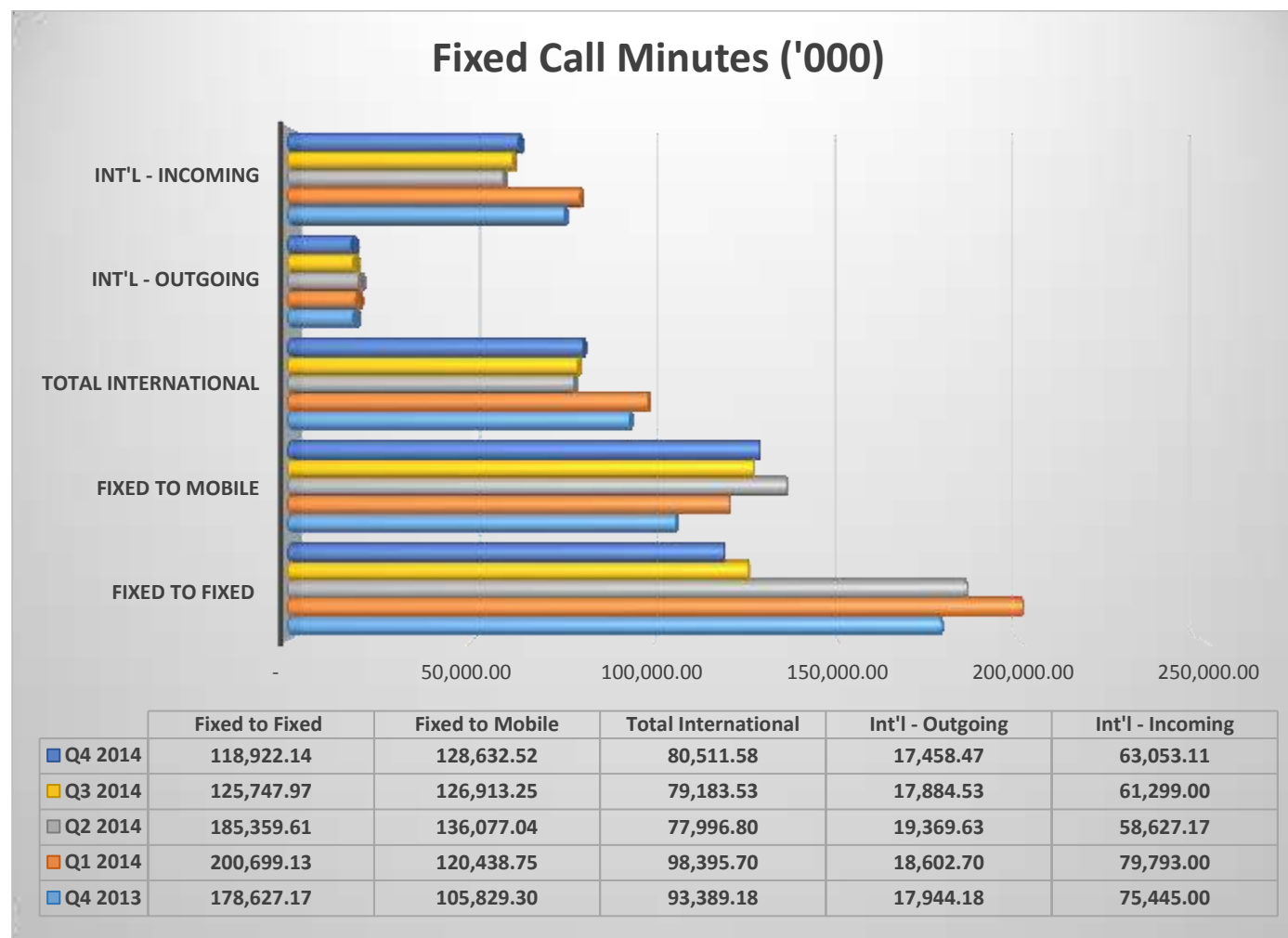
Business: -1.4%

Figure 2: Fixed Service Penetration<sup>1</sup>



<sup>1</sup> Population year end 2014: 2,723,246.  
Source: Statistical Institute of Jamaica

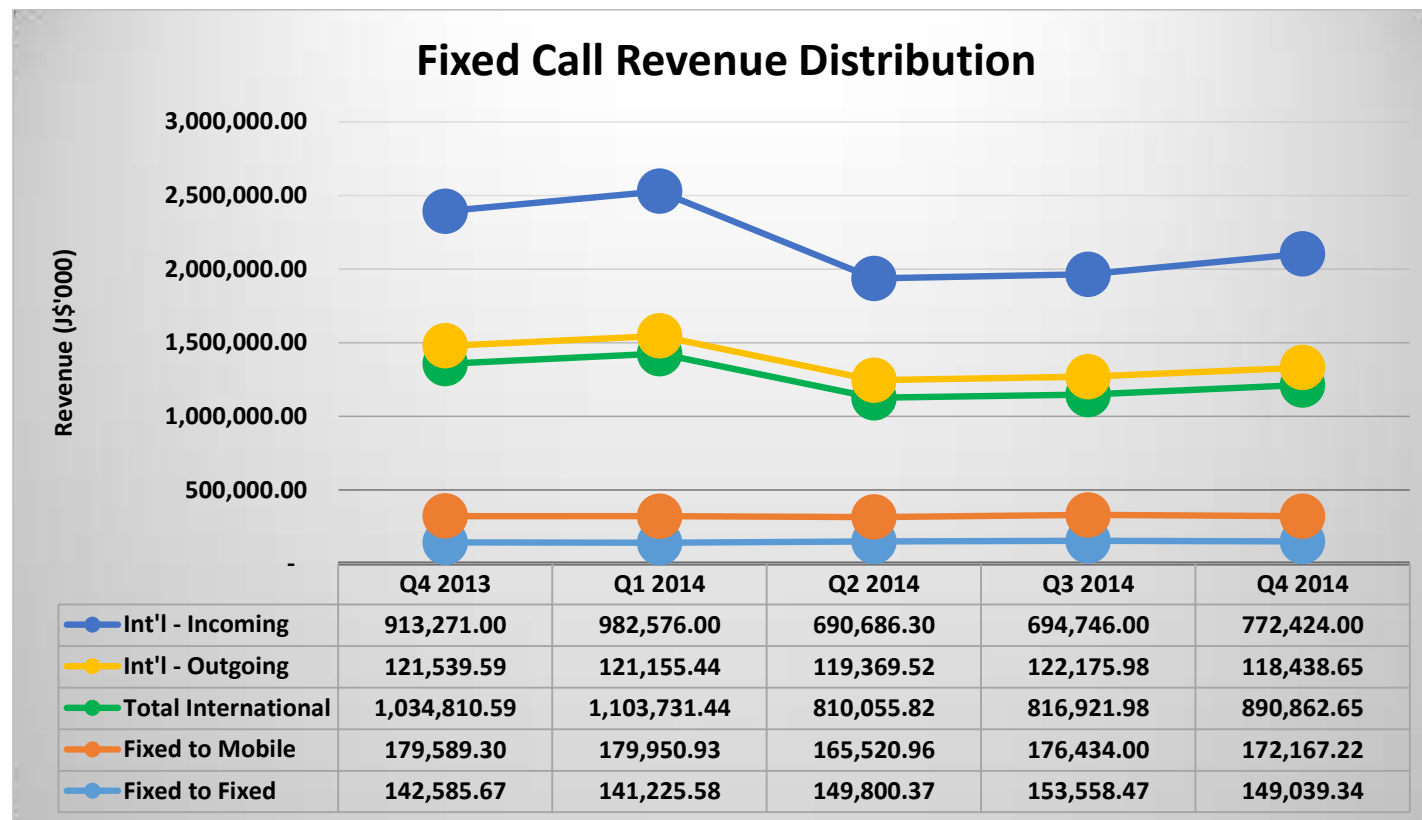
Figure 3: Fixed Call Minutes



**Year on Year Percentage Change**

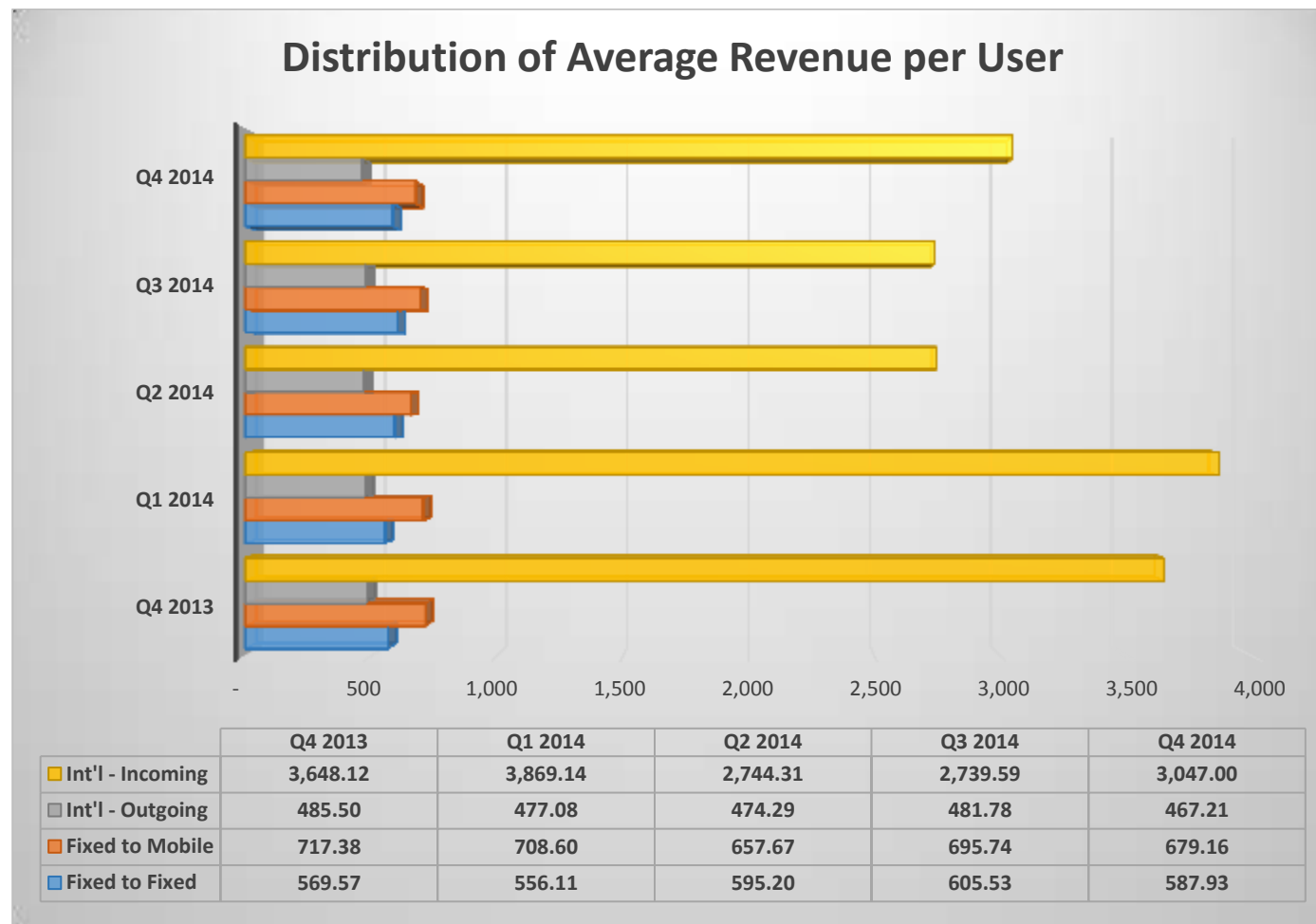
- Fixed to Fixed: -33%
- Fixed to Mobile: 22%
- Total International: -14%
- International - Outgoing: -3%
- International - Incoming: -16%

Figure 4: Fixed Call Revenue Distribution



Year on Year Percentage Change	
Fixed to Fixed:	5%
Fixed to Mobile:	-4%
Total International:	-14%
International Outgoing:	-3%
International Incoming:	-15%

Figure 5: Distribution of Average Revenue per User

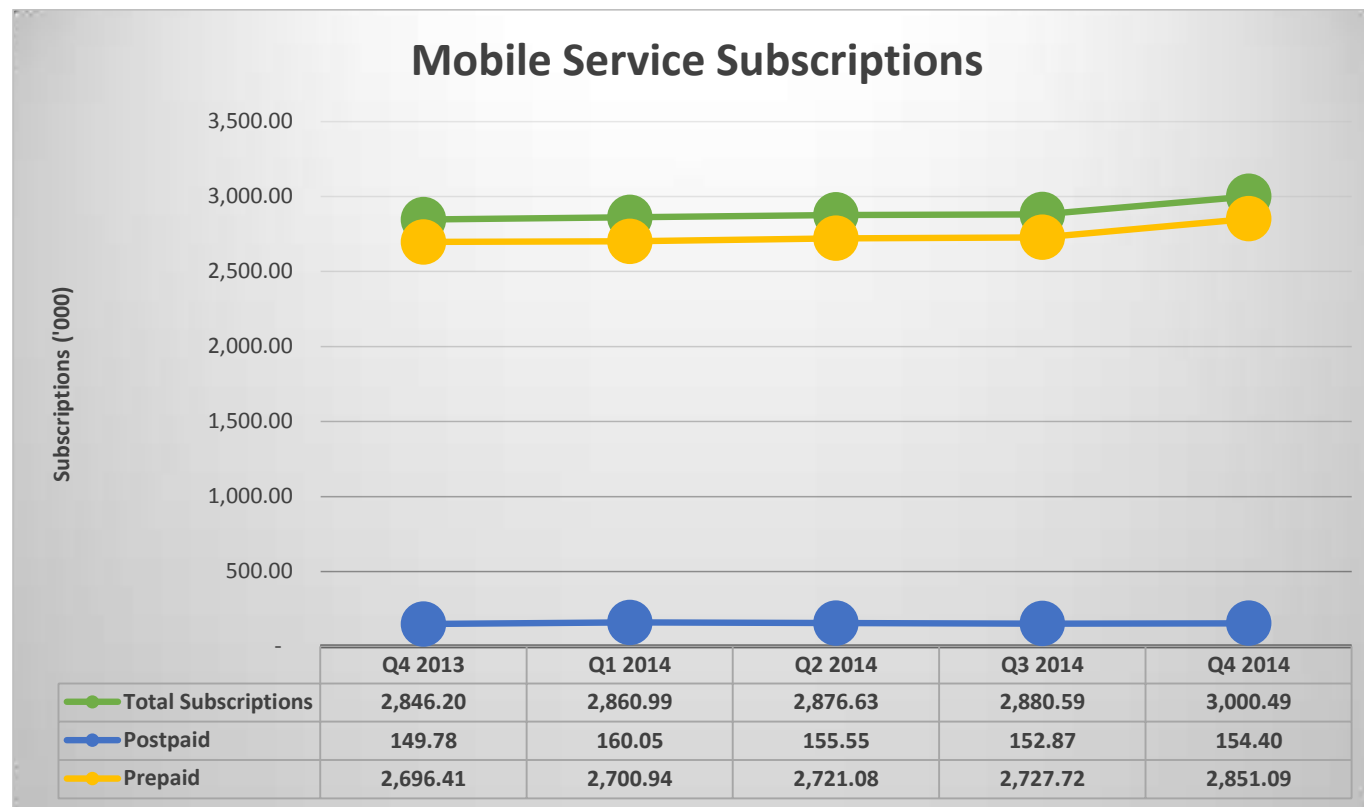


Year on Year Percentage Change	
Fixed to Fixed:	3%
Fixed to Mobile:	-5%
International – Outgoing:	-4%
International – Incoming:	-16%



# Mobile Data

Figure 6: Mobile Service Subscriptions



**Year on Year Percentage Change**

Total Subscriptions: 5%

Postpaid: 3%

Prepaid: 5%

Figure 7: Mobile Service Penetration

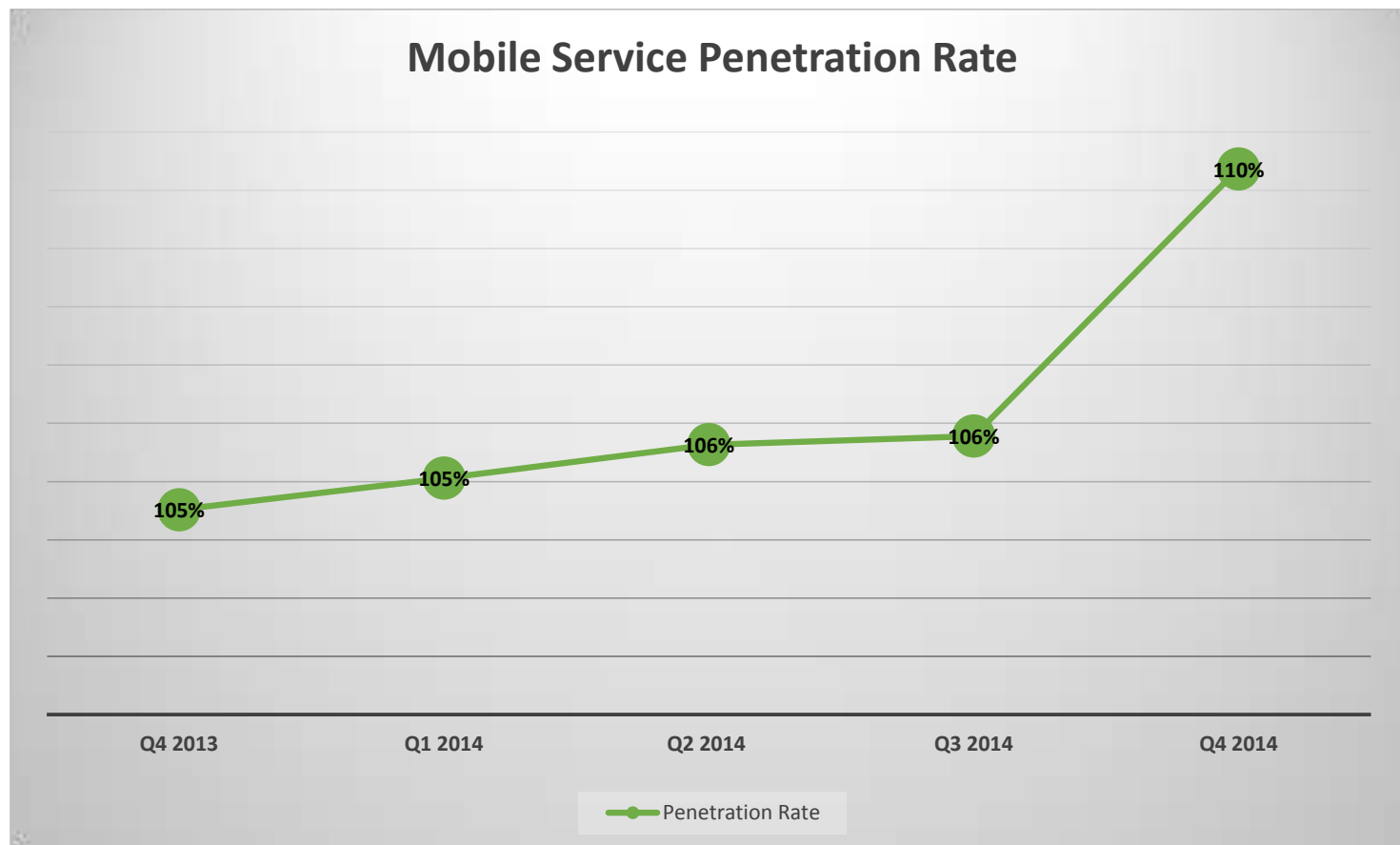
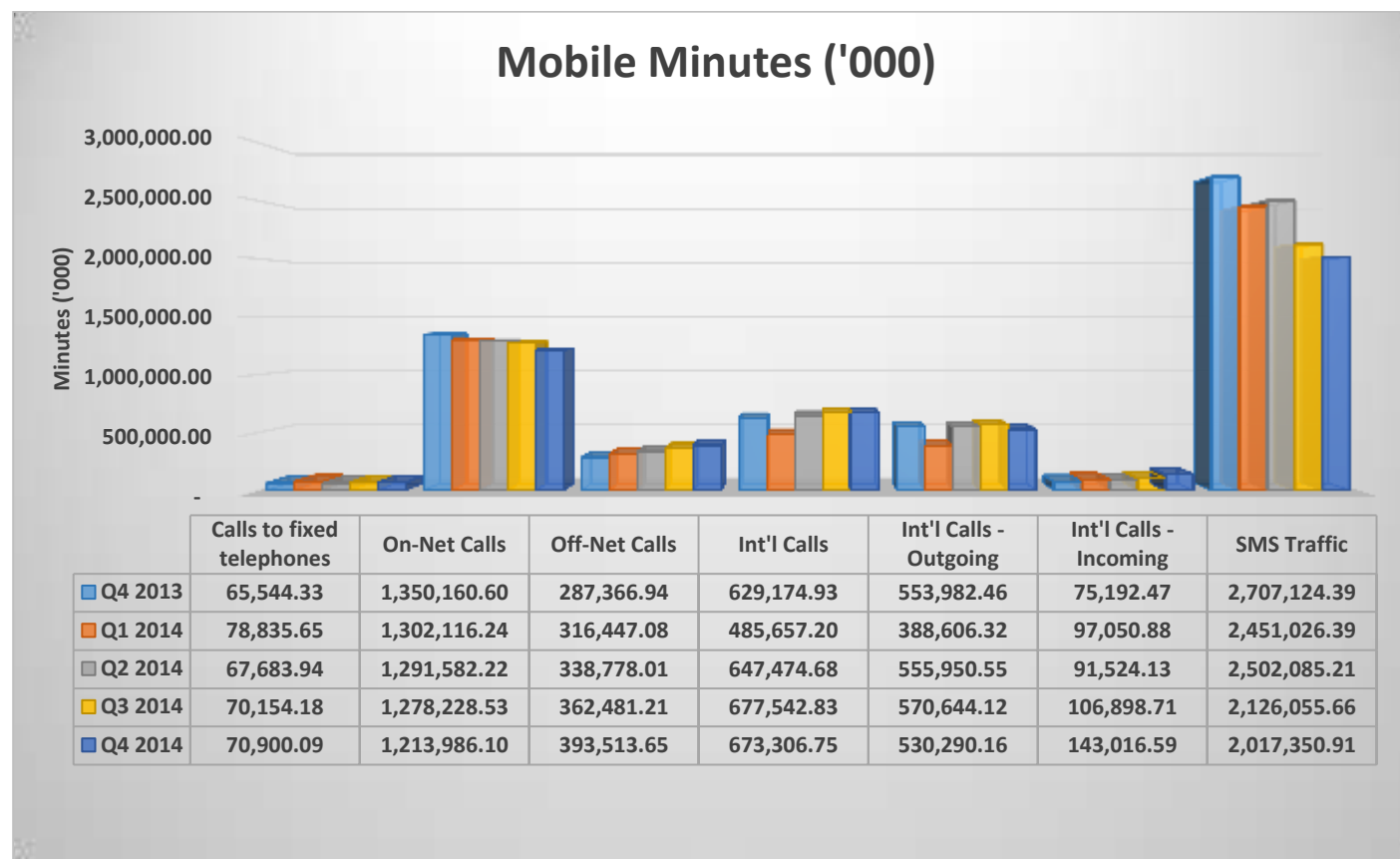


Figure 8: Mobile Minutes



**Year on Year Percentage Change**

- Calls to fixed lines: 8%
- On-Net Calls: -10%
- Off-Net Calls: 37%
- Total International Calls: 7%
- International - Outgoing: -4%
- International - Incoming: 90%
- SMS Traffic: -25%

Figure 9: Mobile Service Revenue

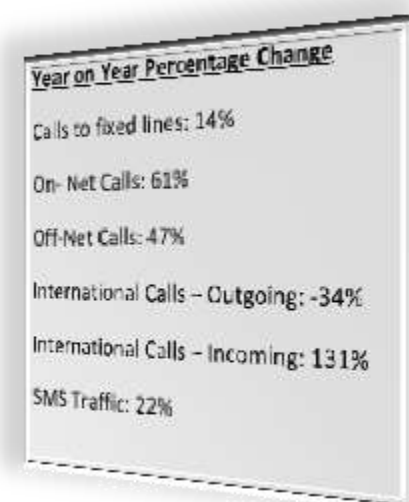
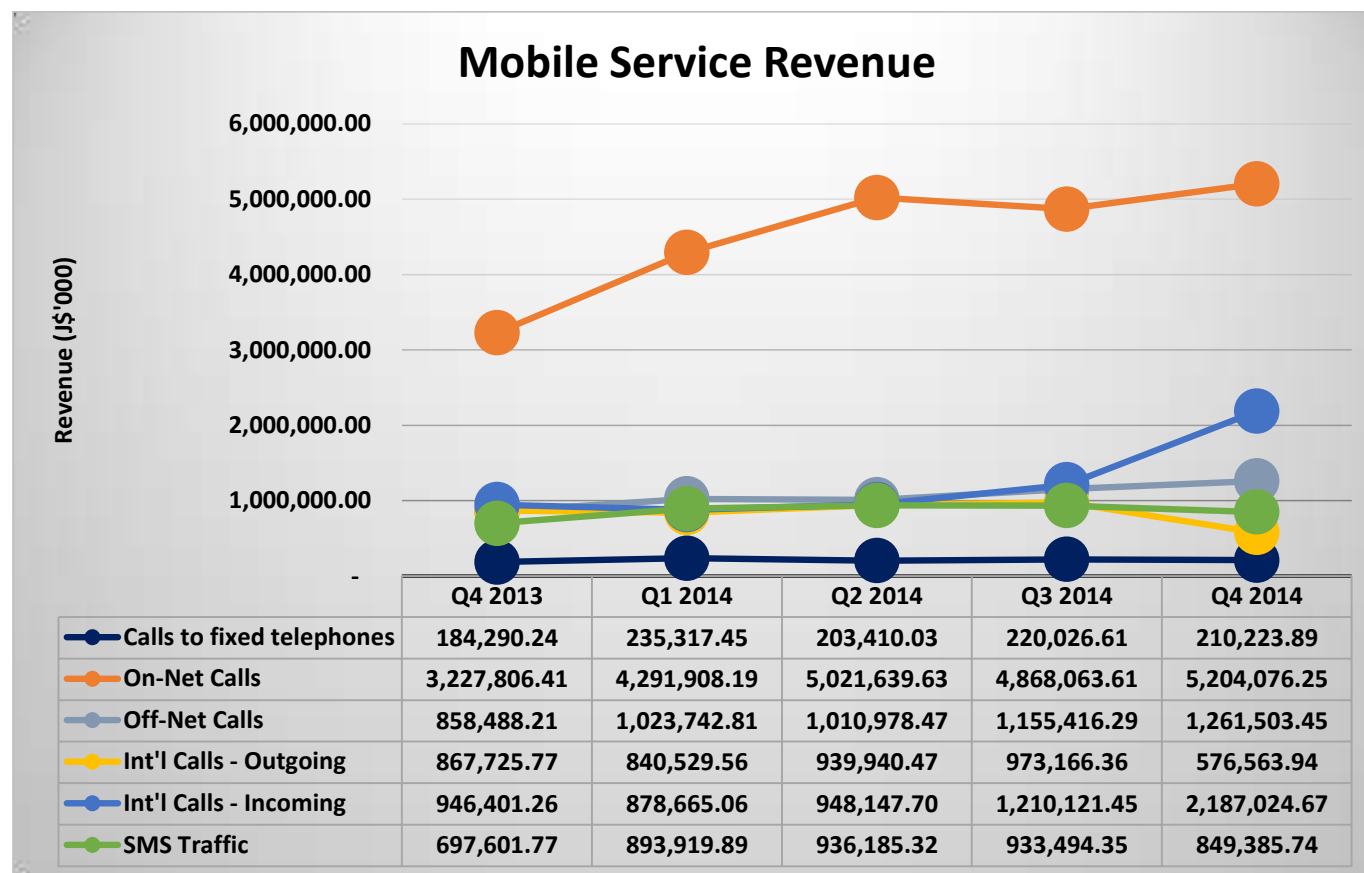
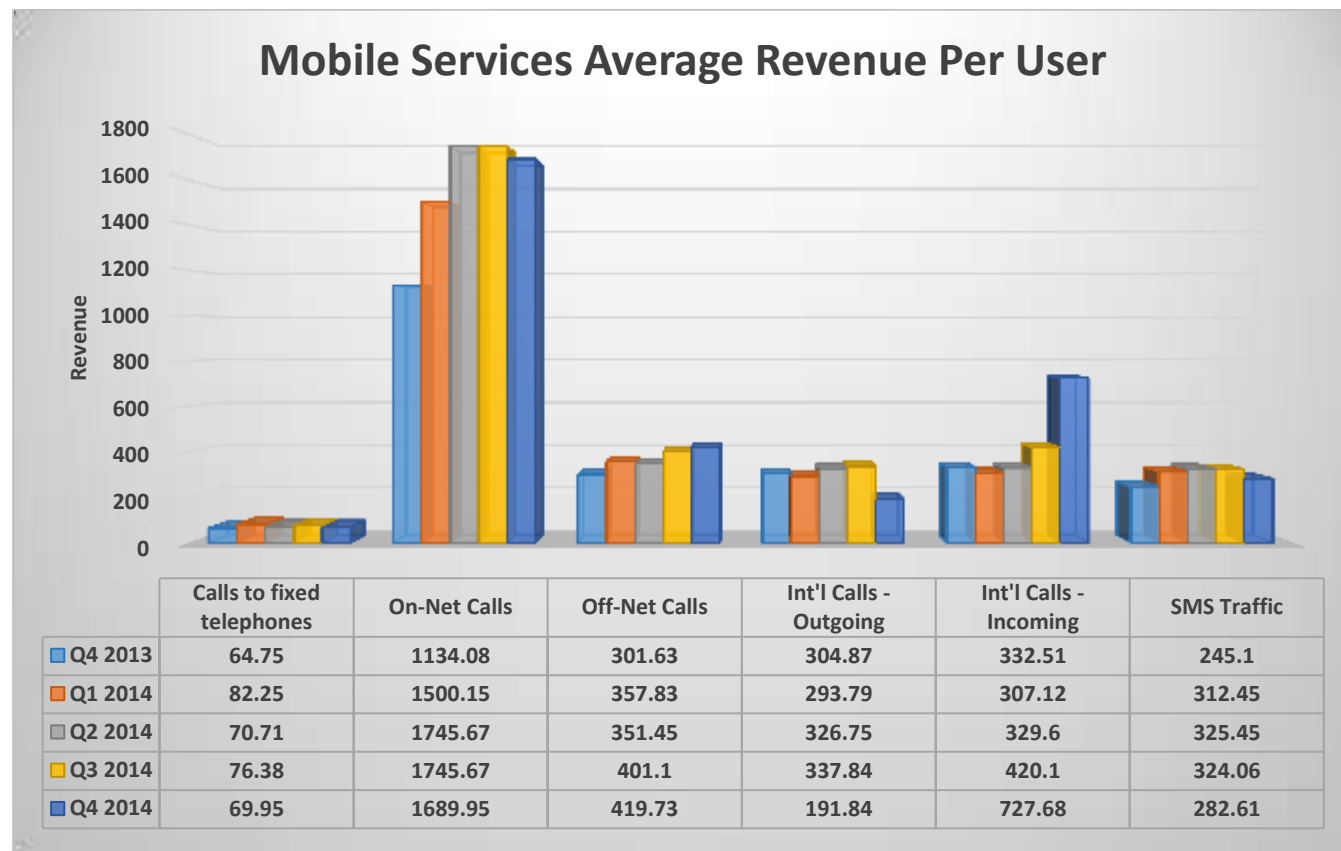


Figure 10: Mobile Services Average Revenue per User

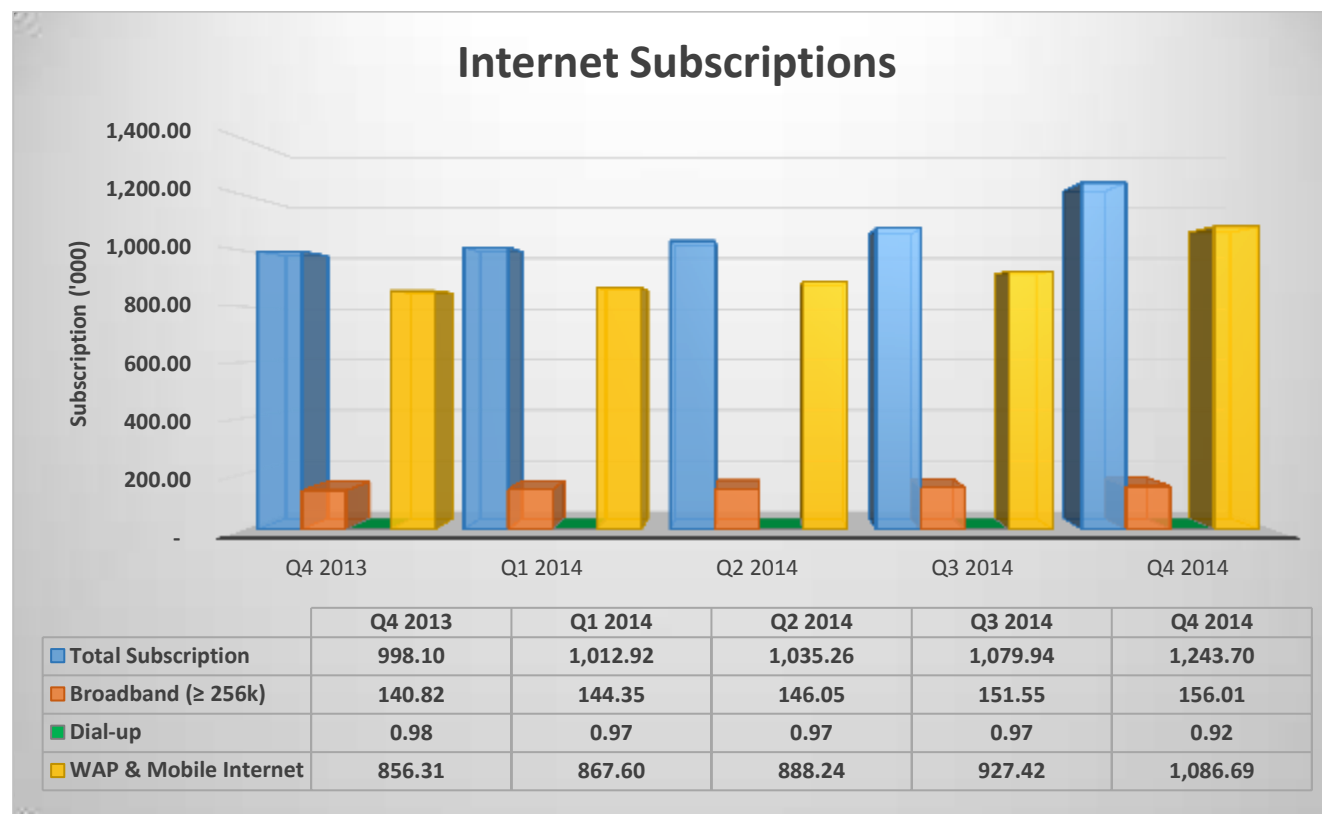


**Year on Year Percentage Change**

- Calls to fixed lines: 8%
- On-Net Calls: 49%
- Off-Net Calls: 39%
- International Calls – Outgoing: -37%
- International Calls -Incoming: 119%
- SMS Traffic: 15%

# Internet

Figure 11: Internet Subscriptions

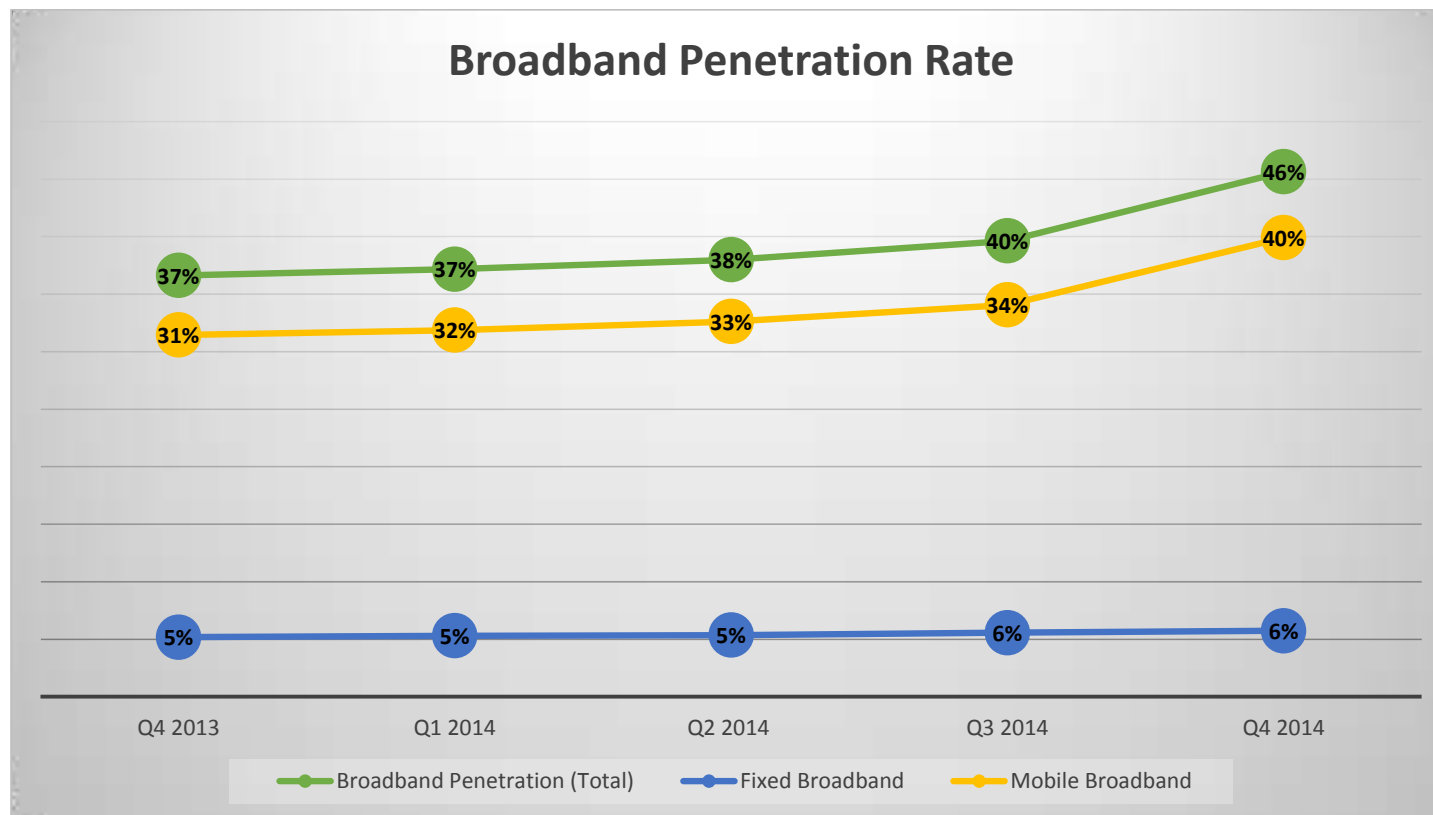


**Year on Year Percentage Change**

- Total Subscriptions: 25%
- Broadband (≥256k): 11%
- Dial-up: -6%
- WAP & Mobile Internet: 27%



Figure 12: Broadband Penetration Rate



# APPENDIX

Fixed Call Service	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	% Change Q4'14/Q4 '13
<b>Total Subscription ('000)</b>	250.34	253.95	251.68	253.60	254.50	1.66
<b>Fixed to Fixed ('000 minutes)</b>	178,627.17	200,699.13	185,359.61	125,747.97	118,922.14	-33.42
<b>Fixed to Mobile Calls ('000 minutes)</b>	105,829.30	120,438.75	136,077.04	126,913.25	128,632.52	21.55
<b>Total International Calls</b>	93,389.18	98,395.70	77,996.80	79,183.53	80,511.58	-13.79
<b>Outgoing International Calls ('000 minutes)</b>	17,944.18	18,602.70	19,369.63	17,884.53	17,458.47	-2.71
<b>Incoming International Calls ('000 minutes)</b>	75,445.00	79,793.00	58,627.17	61,299.00	63,053.11	-16.43
<b>Total Revenue (J\$ million)</b>	2,436.53	2,523.70	2,213.16	2,215.97	2,326.33	-4.52

Mobile Services	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	% Change Q4'14/Q4'13
<b>Total Subscription ('000)</b>	2,846.20	2,860.99	2,876.63	2,880.59	3,005.49	5.60
<b>On Net Calls ('000 minutes)</b>	1,350,160.60	1,302,116.24	1,291,582.22	1,278,228.53	1,213,986.10	-10.09
<b>Off-Net Calls ('000 minutes)</b>	287,366.94	316,447.08	338,778.01	362,481.21	393,513.65	36.94
<b>International calls</b>	629,174.93	485,657.20	647,474.68	677,542.83	673,306.75	7.01
<b>Outgoing International ('000 minutes)</b>	553,982.46	388,606.32	555,950.55	570,644.12	530,290.16	-4.28
<b>Incoming International ('000 minutes)</b>	75,192.47	97,050.88	91,524.13	106,898.71	143,016.59	90.20
<b>SMS and other mobile data traffic</b>	2,707,124.39	2,451,026.39	2,502,085.21	2,126,055.66	2,017,350.91	-25.48
<b>Total Revenue (J\$ million)</b>	7,777.02	9,146.89	11,631.28	12,205.59	13,391.68	72.20

Internet Service	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	% Change Q4'14/Q4'2013
<b>Total Subscriptions ('000)</b>	998.10	1,012.92	1,035.26	1,079.94	1,243.70	24.61
<b>Broadband (≥256K)</b>	140.82	144.35	146.05	151.55	156.01	10.79
<b>Dial-up</b>	0.98	0.97	0.97	0.97	0.92	-6.12
<b>WAP &amp; Mobile Internet</b>	856.31	867.60	888.24	927.42	1,086.69	26.90
<b>Total Revenue (J\$' million)</b>	1,523.98	1,839.89	2,726.14	2,981	3,616.92	137.33

Subscriber HHI	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
<b>Fixed Subscriber HHI</b>	8,534	8,347	8,315	8,328	8,326
<b>Mobile Subscriber HHI</b>	6,324	6,286	6,257	6,201	6,053
<b>Fixed Line Broadband Subscriber HHI</b>	5,000	5,001	5,000	5,001	5,000
<b>Mobile Broadband Subscriber HHI</b>	9,319	9,332	9,412	9,566	9,529