
Office of Utilities Regulation

Telecommunications Market Information Report October - December 2020



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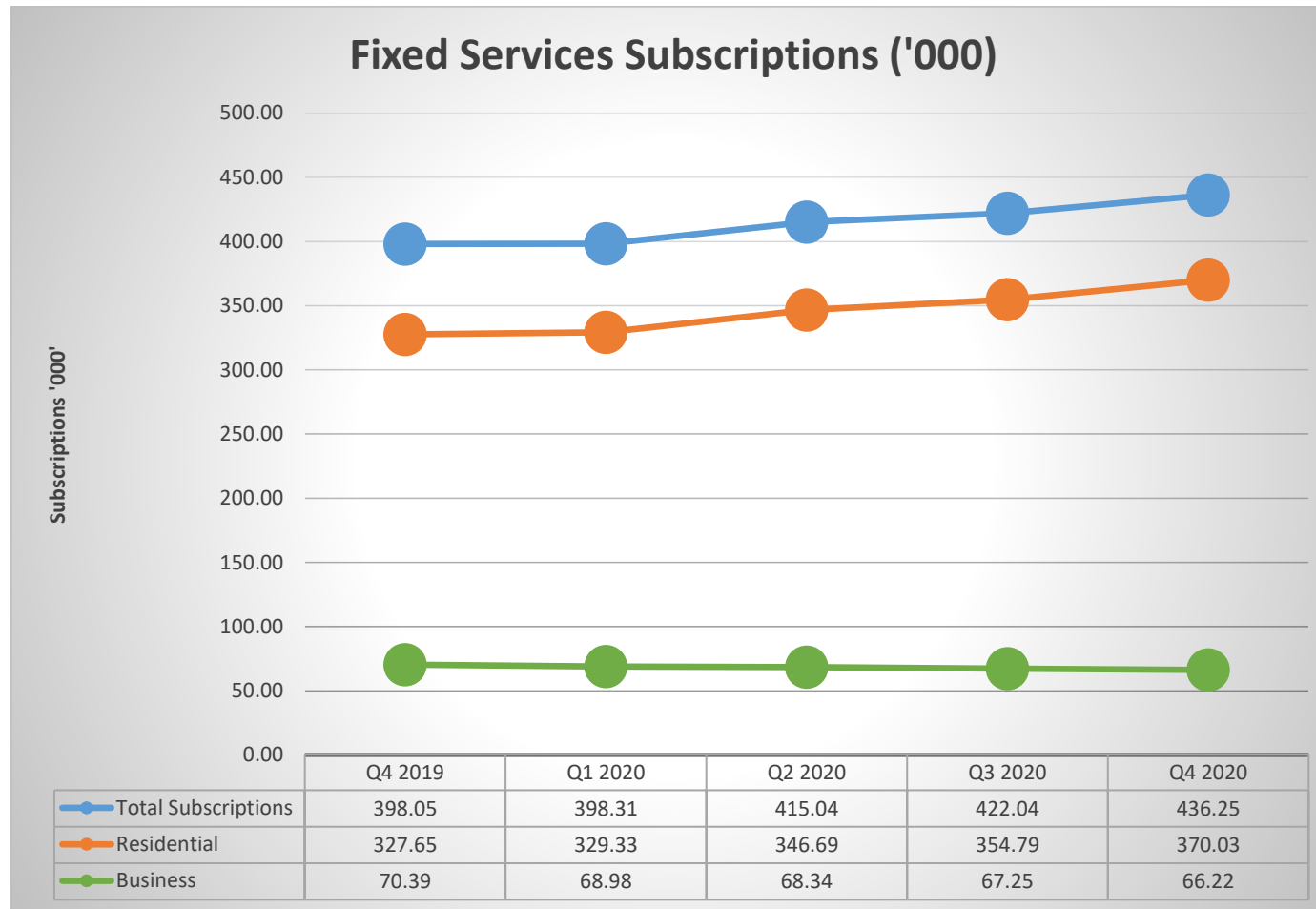
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Fixed Market Data

Figure 1: Fixed Services Subscriptions



% Change: Q4 '20/ Q3 '20

Total Subscriptions: 3.37%

Residential: 4.29%

Business: -1.53%

Figure 2: Fixed Call Minutes

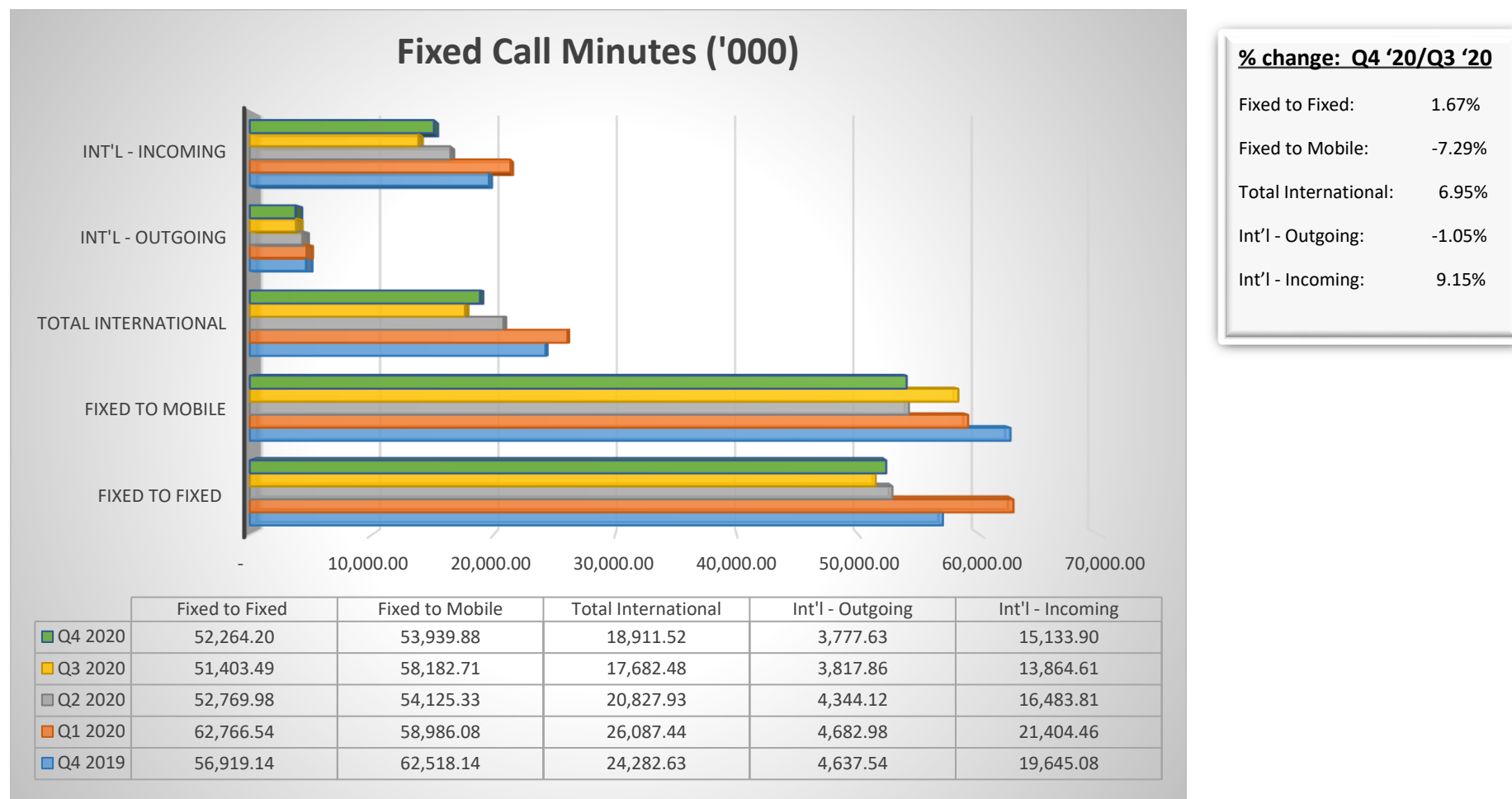


Figure 3: Fixed Call Revenue Distribution

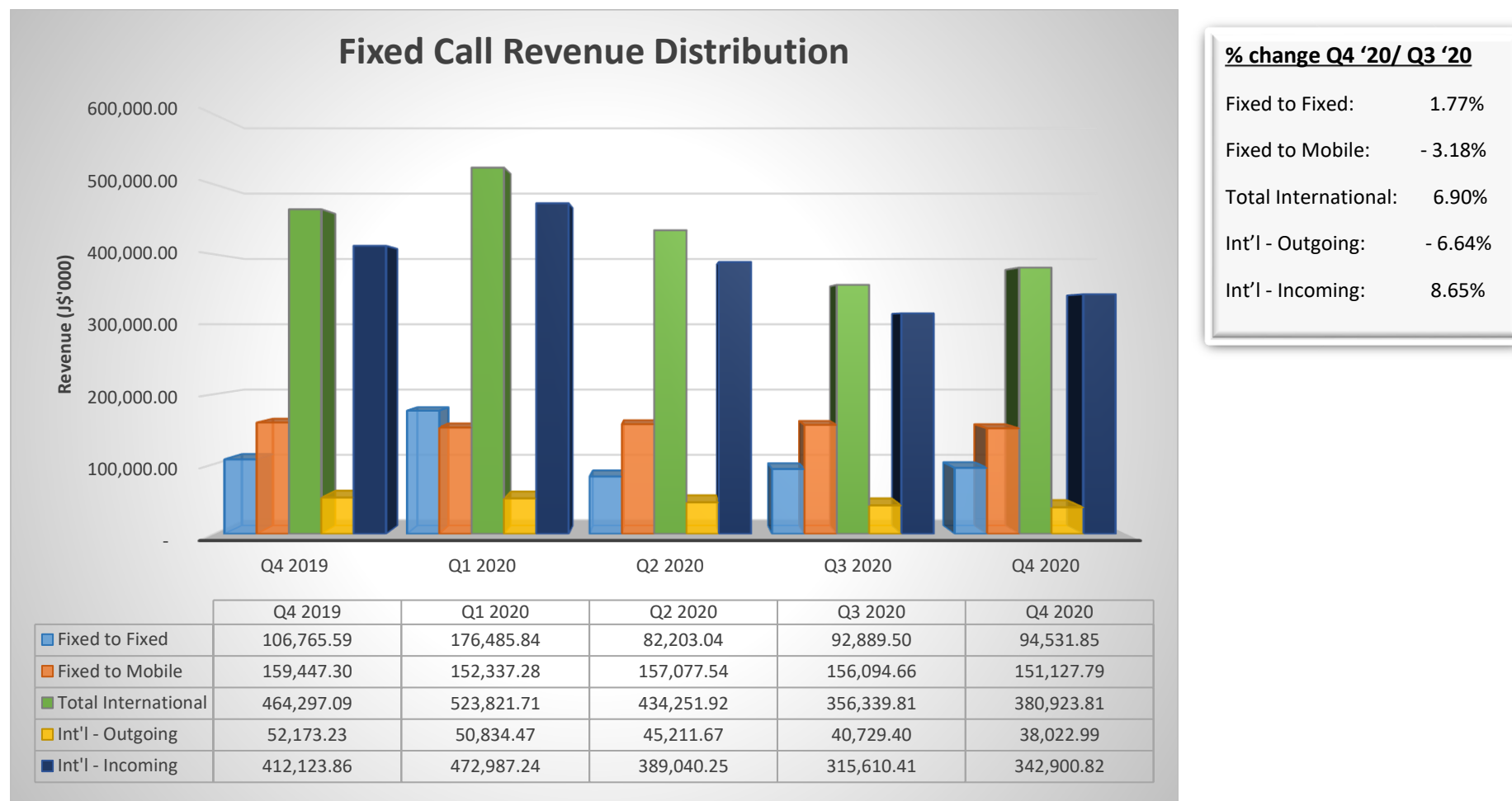
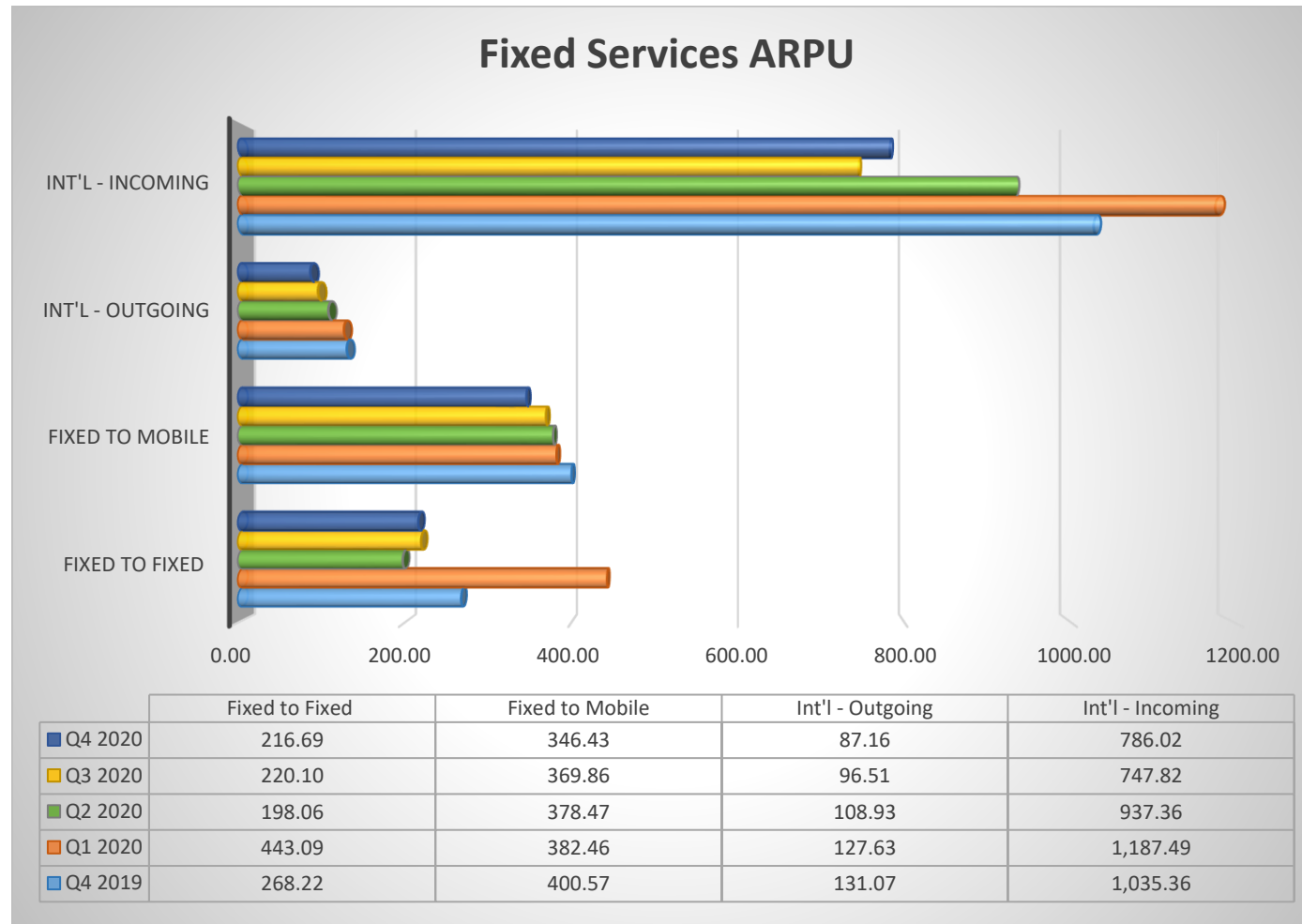


Figure 4: Fixed Services Average Revenue per User (ARPU)



% Change: Q4 '20/ Q3 '20

Fixed to Fixed: -1.55%

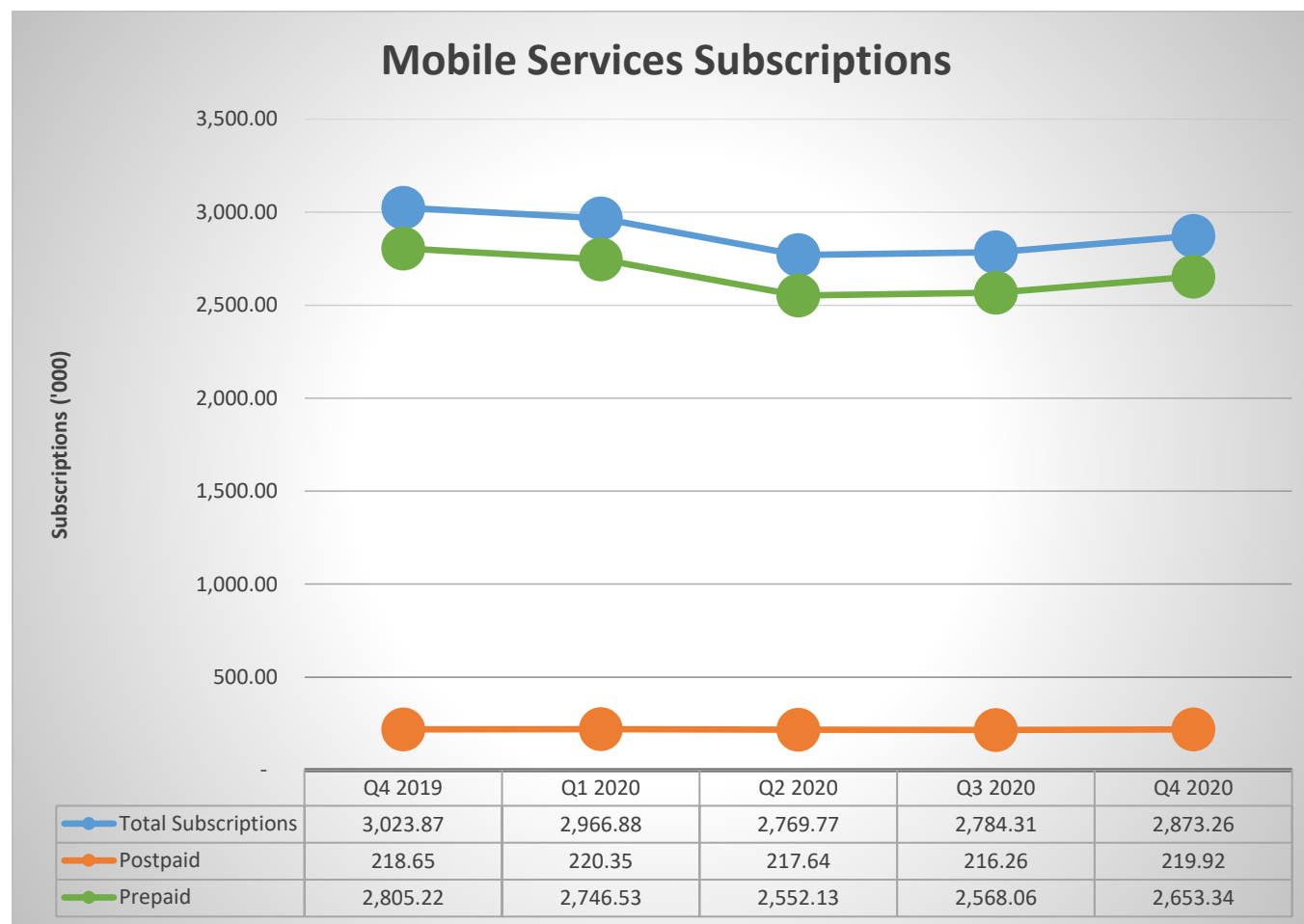
Fixed to Mobile: -6.34%

Int'l - Outgoing: -9.69%

Int'l - Incoming: 5.11%

Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q4 '20/ Q3 '20

Total Subscriptions: 3.19%

Postpaid: 1.70%

Prepaid: 3.32%

Figure 6: Mobile Minutes

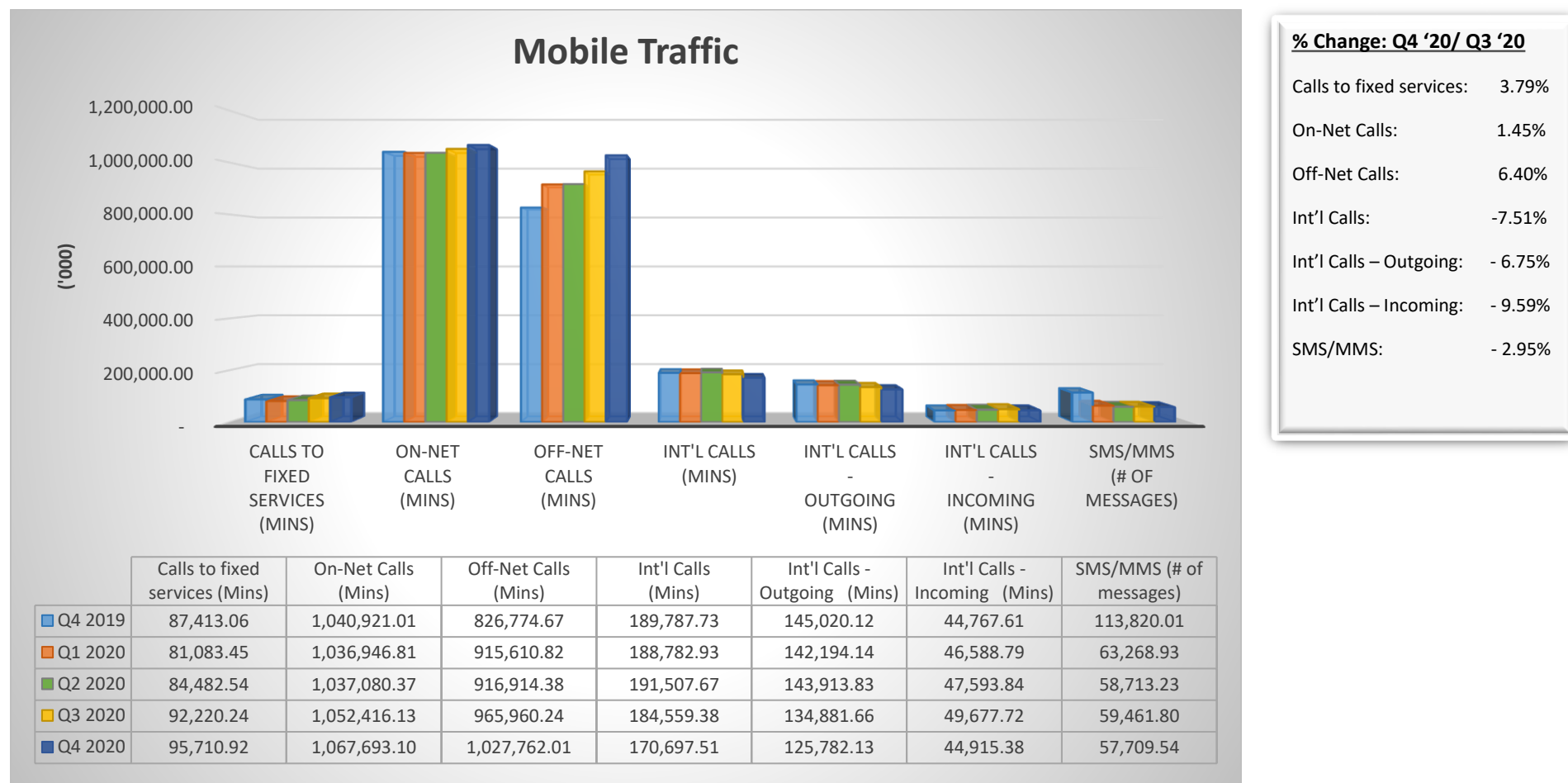
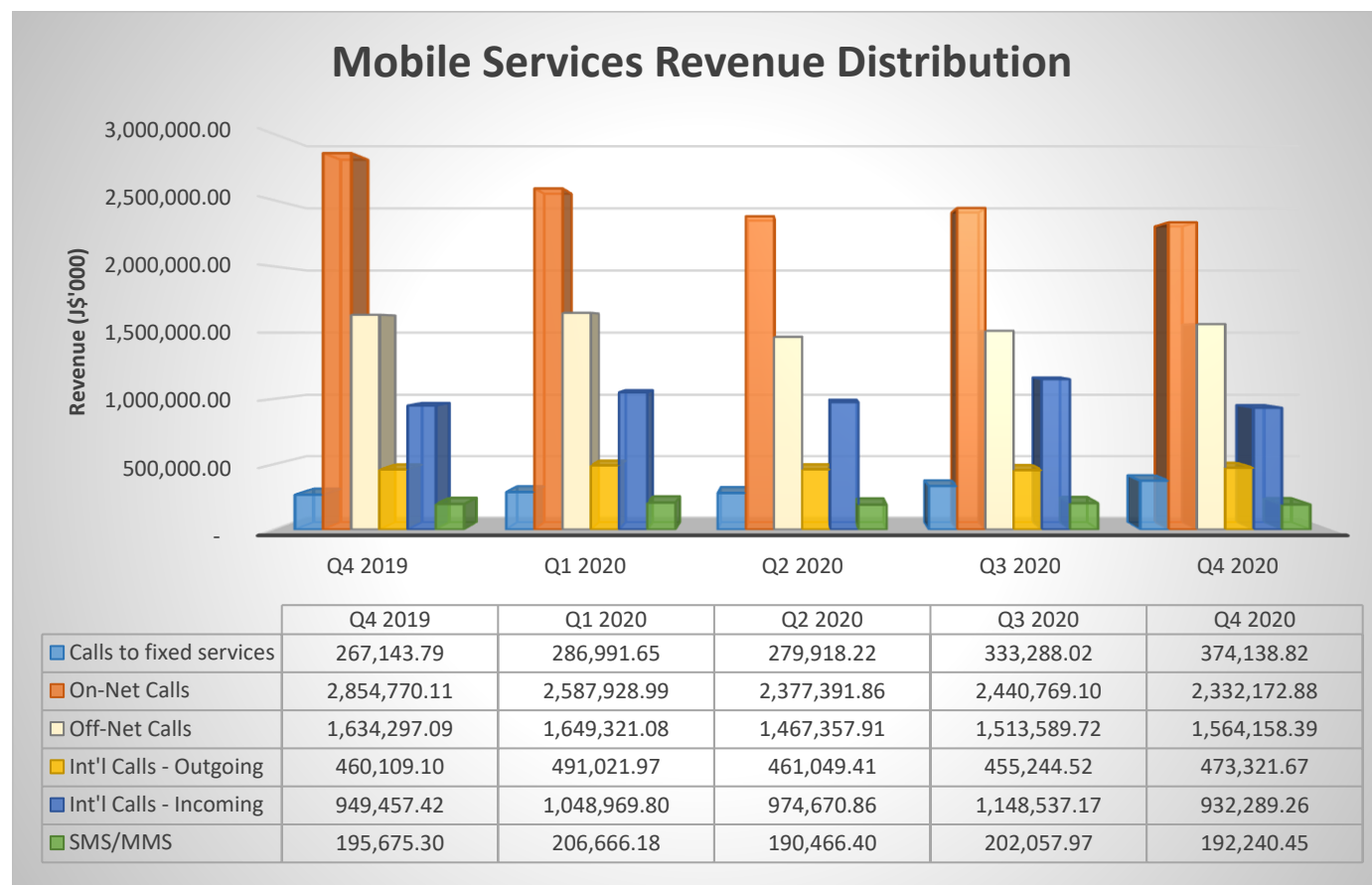


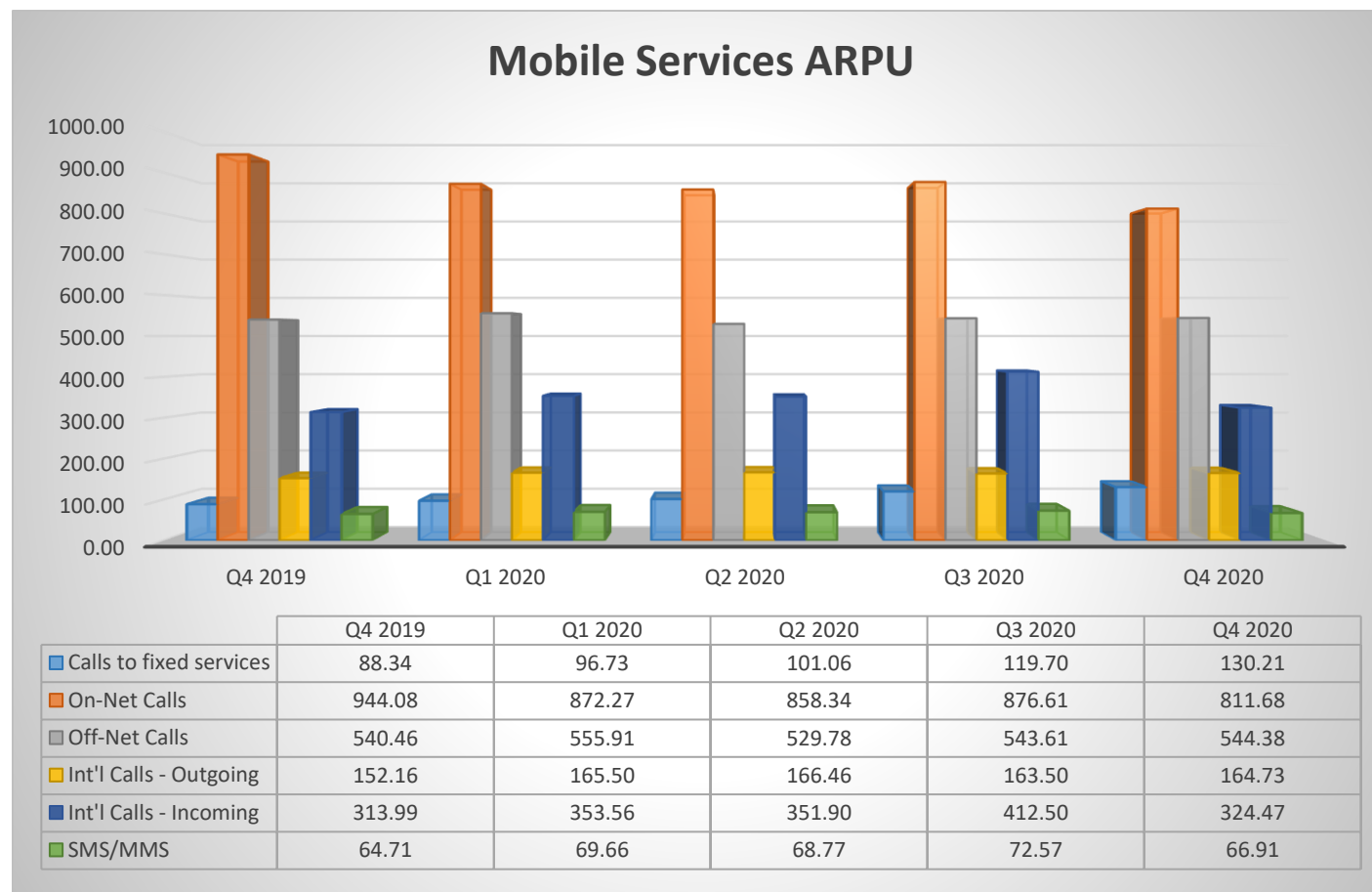
Figure 7: Mobile Services Revenue Distribution



% Change: Q4 '20/ Q3 '20

Calls to Fixed services	12.26%
On-Net Calls:	- 4.45%
Off-Net Calls:	3.34%
Int'l Calls – Outgoing:	3.97%
Int'l Calls – Incoming:	-18.83%
SMS/MMS:	- 4.86%

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

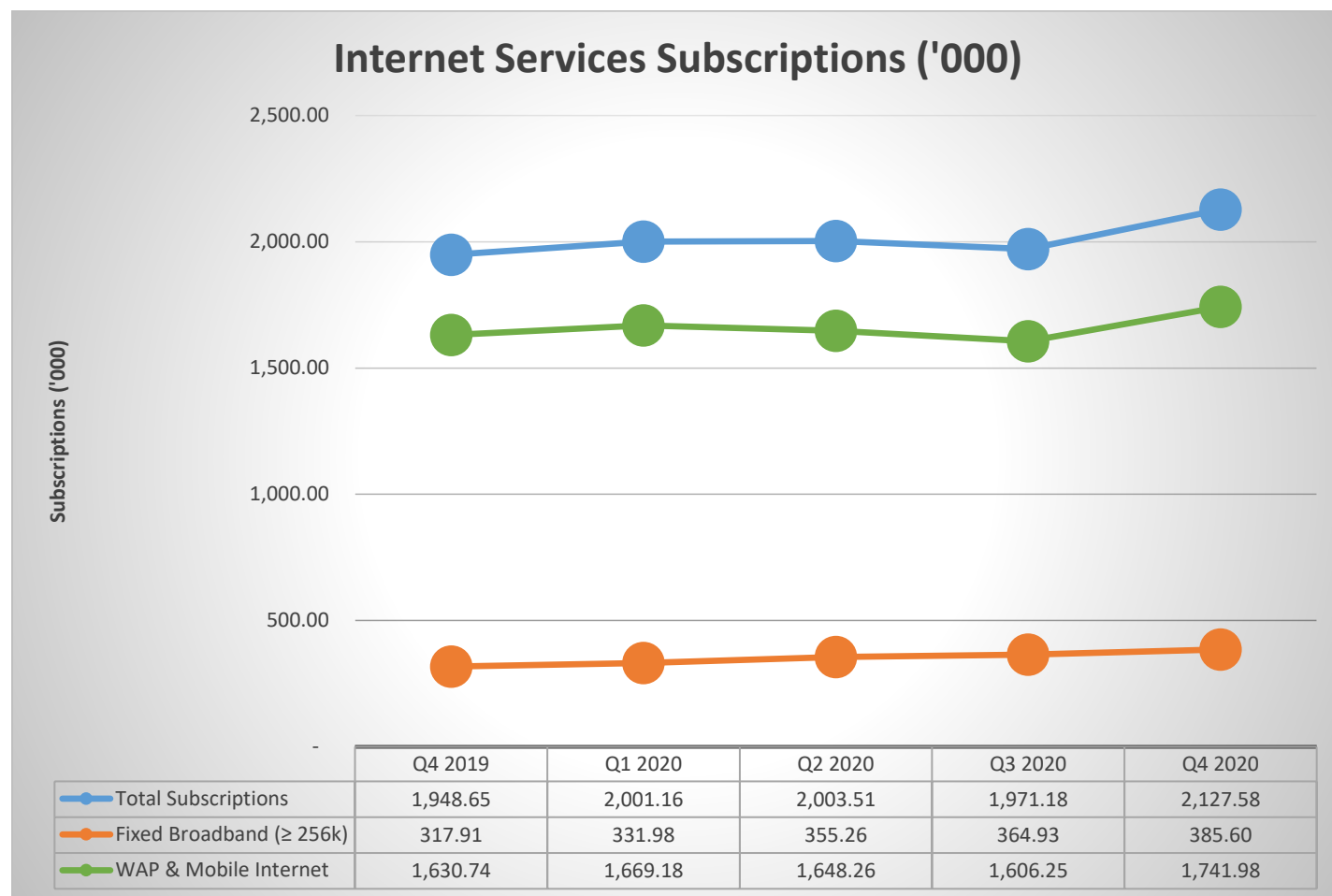


% Change Q4 '20/ Q3 '20

Calls to fixed service	8.78%
On-Net Calls:	-7.41%
Off-Net Calls:	0.14%
Int'l Calls – Outgoing:	0.75%
Int'l Calls – Incoming:	-21.34%
SMS/MMS:	-7.80%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q4 '20/ Q3 '20

Total Subscriptions: 7.93%

Fixed Broadband (≥ 256k): 5.66%

WAP & Mobile Internet: 8.45%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Fixed Subscription Penetration Rate	14.6%	14.6%	15.2%	15.4%	16.0%
Mobile Subscription Penetration Rate	110.8%	108.5%	101.3%	101.8%	105.1%
Fixed Broadband Subscription Penetration Rate	11.7%	12.1%	13.0%	13.4%	14.1%
Mobile Broadband Subscription Penetration Rate	59.8%	61.1%	60.3%	58.8%	63.7%
Total Broadband Subscription Penetration Rate	71.4%	73.2%	73.3%	72.1%	77.8%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Fixed HHI	4,633	4,725	4,673	4,707	4,666
Mobile HHI	5,234	5,204	5,150	5,141	5,151
Fixed Broadband HHI	3,642	3,673	3,704	3,716	3,718
Mobile Broadband HHI	5,258	5,311	5,435	5,227	5,237

¹ Calculated using population year-end 2019 data from the Statistical Institute of Jamaica: 2,734,092.

² Calculated using subscription data.

Appendix

Fixed Market	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	% Change Q4 '20/Q3 '20	% Change Q4 '20/Q4 '19
Total Subscriptions ('000)	398.05	398.31	415.04	422.04	436.25	3.37	9.60
Fixed to Fixed ('000 minutes)	56,919.14	62,766.54	52,769.98	51,403.49	52,264.20	1.67	-8.18
Fixed to Mobile Calls ('000 minutes)	62,518.14	58,986.08	54,125.33	58,182.71	53,939.88	-7.29	-13.72
Total International Calls ('000 minutes)	24,282.63	26,087.44	20,827.93	17,682.48	18,911.52	6.95	-22.12
Outgoing International Calls ('000 minutes)	4,637.54	4,682.98	4,344.12	3,817.86	3,777.63	-1.05	-18.54
Incoming International Calls ('000 minutes)	19,645.08	21,404.46	16,483.81	13,864.61	15,133.90	9.15	-22.96
Total Revenue (J\$' million)	2,429.86	2,490.16	2,341.85	2,354.01	2,412.93	2.50	-0.70

Mobile Market	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	% Change Q4 '20/Q3 '20	% Change Q4 '20/Q4 '19
Total Subscriptions ('000)	3,023.87	2,966.88	2,769.77	2,784.31	2,873.26	3.19	-4.98
Calls to Fixed Services	87,413.06	81,083.45	84,482.54	92,220.24	95,710.92	3.79	9.49
On-Net Calls ('000 minutes)	1,040,921.01	1,036,946.81	1,037,080.37	1,052,416.13	1,067,693.10	1.45	2.57
Off-Net Calls ('000 minutes)	826,774.67	915,610.82	916,914.38	965,960.24	1,027,762.01	6.40	24.31
International calls	189,787.73	188,782.93	191,507.67	184,559.38	170,697.51	-7.51	-10.06
Outgoing International ('000 minutes)	145,020.12	142,194.14	143,913.83	134,881.66	125,782.13	-6.75	-13.27
Incoming International ('000 minutes)	44,767.61	46,588.79	47,593.84	49,677.72	44,915.38	-9.59	0.33
SMS/MMS traffic ('000 # of messages)	113,820.01	63,268.93	58,713.23	59,461.80	57,709.54	-2.95	-49.30
Total Revenue (J\$ ' million)	14,490.68	13,023.50	12,110.46	12,958.42	12,819.32	-1.07	-11.53

Internet Market	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	% Change Q4 '20/Q3 '20	% Change Q3 '20/Q3 '19
Total Subscriptions ('000)	1,948.65	2,001.16	2,003.51	1,971.18	2,127.58	7.93	9.18
Fixed Broadband (≥256K)	317.91	331.98	355.26	364.93	385.60	5.66	21.29
WAP & Mobile Internet	1,630.74	1,669.18	1,648.26	1,606.25	1,741.98	8.45	6.82
Total Revenue (J\$' million)	10,434.84	9,117.43	9,274.19	9,603.67	9,983.15	3.95	-4.33

Penetration Rate	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
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