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# Office of Utilities Regulation

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## Telecommunications Market Information Report January – March 2021

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Telecommunications Market Information Report: January – March 2021  
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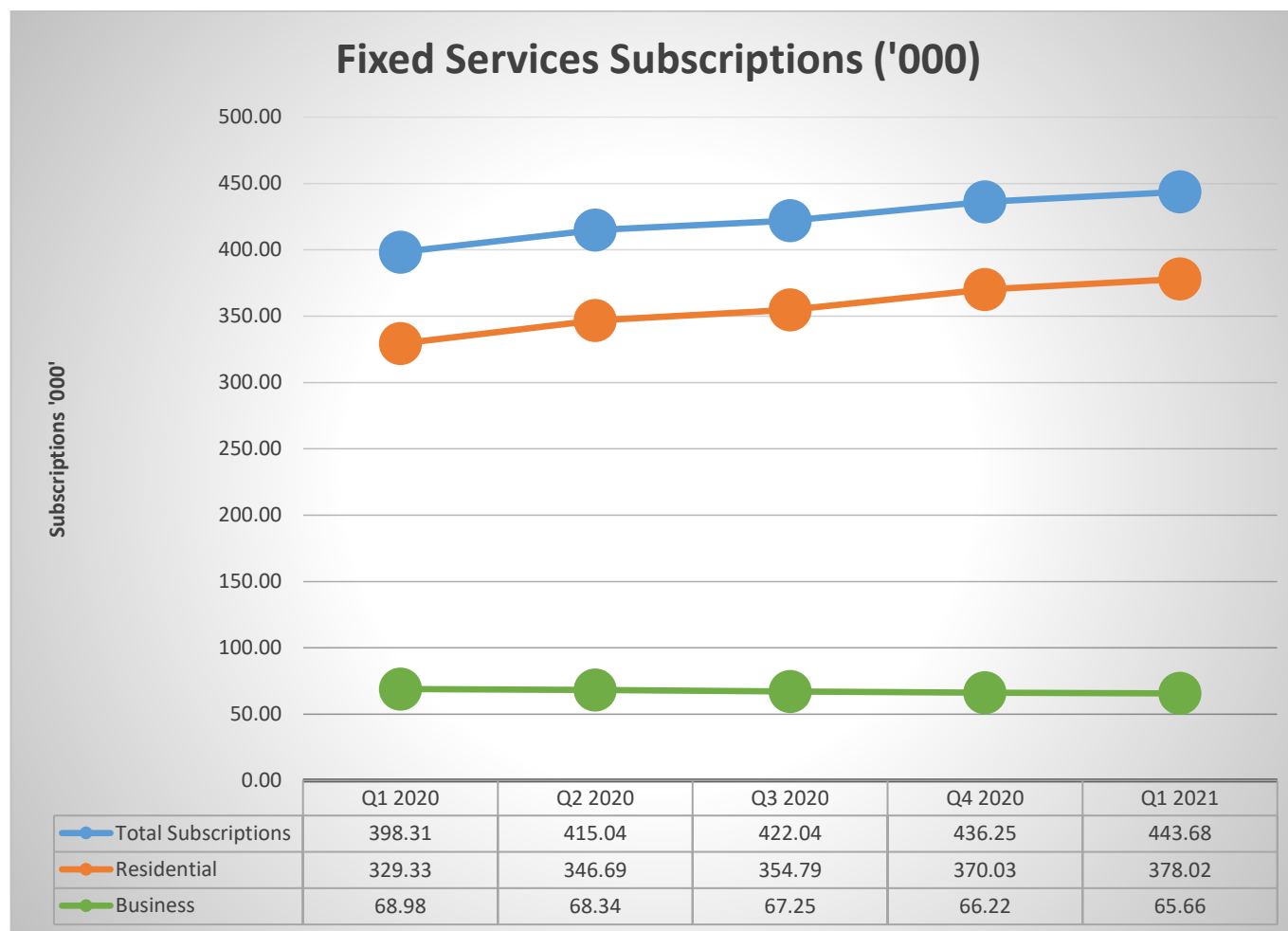
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## Contents

|                                                                        |    |
|------------------------------------------------------------------------|----|
| <b>Fixed Market Data</b> .....                                         | 4  |
| <b>Figure 1: Fixed Services Subscriptions</b> .....                    | 5  |
| <b>Figure 2: Fixed Call Minutes</b> .....                              | 6  |
| <b>Figure 3: Fixed Call Revenue Distribution</b> .....                 | 7  |
| <b>Figure 4: Fixed Services Average Revenue per User (ARPU)</b> .....  | 8  |
| <b>Mobile Market Data</b> .....                                        | 9  |
| <b>Figure 5: Mobile Services Subscriptions</b> .....                   | 10 |
| <b>Figure 6: Mobile Traffic</b> .....                                  | 11 |
| <b>Figure 7: Mobile Services Revenue Distribution</b> .....            | 12 |
| <b>Figure 8: Mobile Services Average Revenue per User (ARPU)</b> ..... | 13 |
| <b>Internet Market Data</b> .....                                      | 14 |
| <b>Figure 9: Internet Services Subscriptions</b> .....                 | 15 |
| <b>Industry Penetration and Concentration</b> .....                    | 16 |
| <b>Penetration Rate</b> .....                                          | 17 |
| <b>Concentration Ratio (Herfindahl-Hirschman Index)</b> .....          | 17 |
| <b>Appendix</b> .....                                                  | 18 |

# Fixed Market Data

Figure 1: Fixed Services Subscriptions



**% Change: Q1 '21/ Q4 '20**

Total Subscriptions: 1.70%

Residential: 2.16%

Business: -0.86%

Figure 2: Fixed Call Minutes

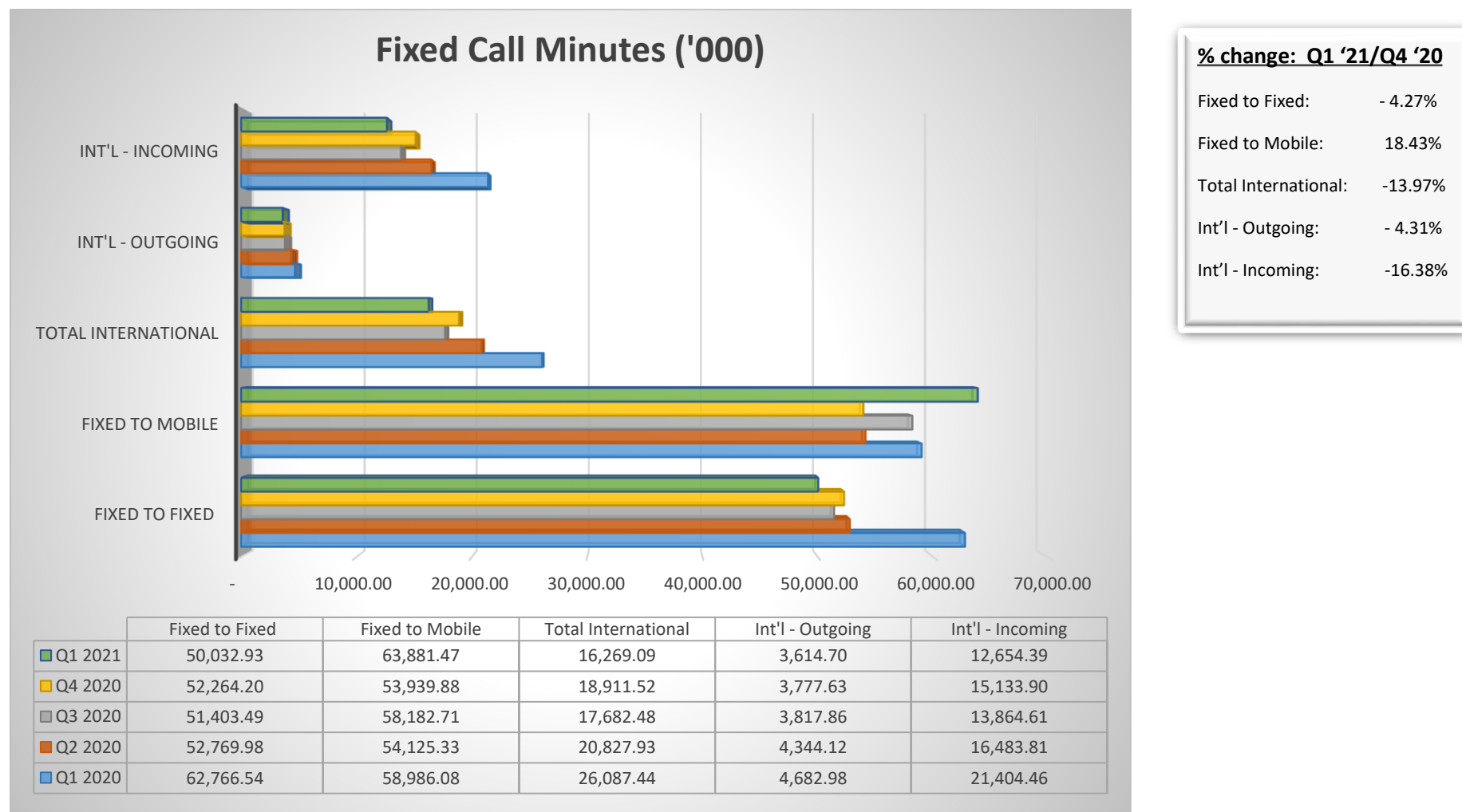
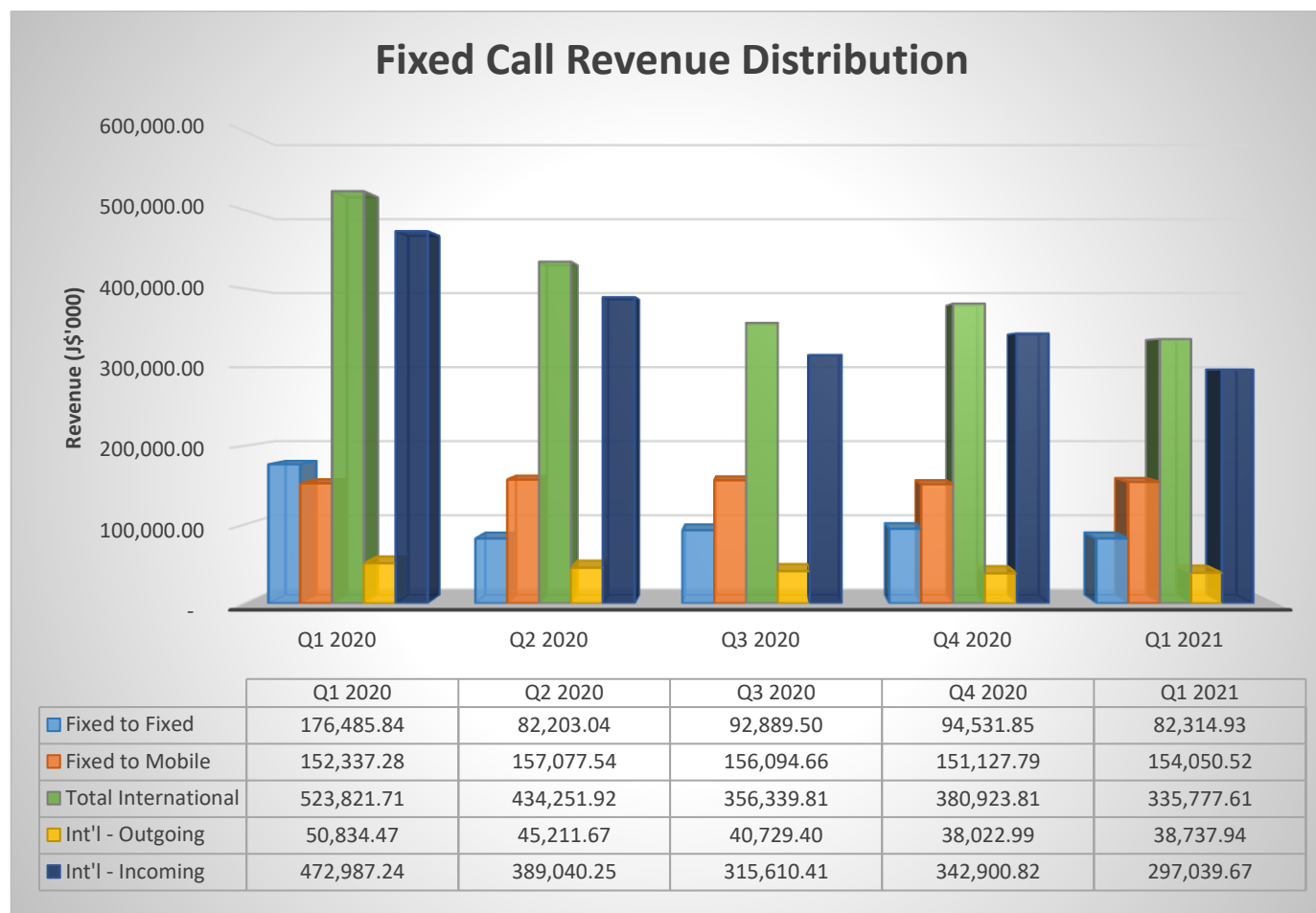


Figure 3: Fixed Call Revenue Distribution



**% change Q1 '21/ Q4 '20**

Fixed to Fixed: -12.92%

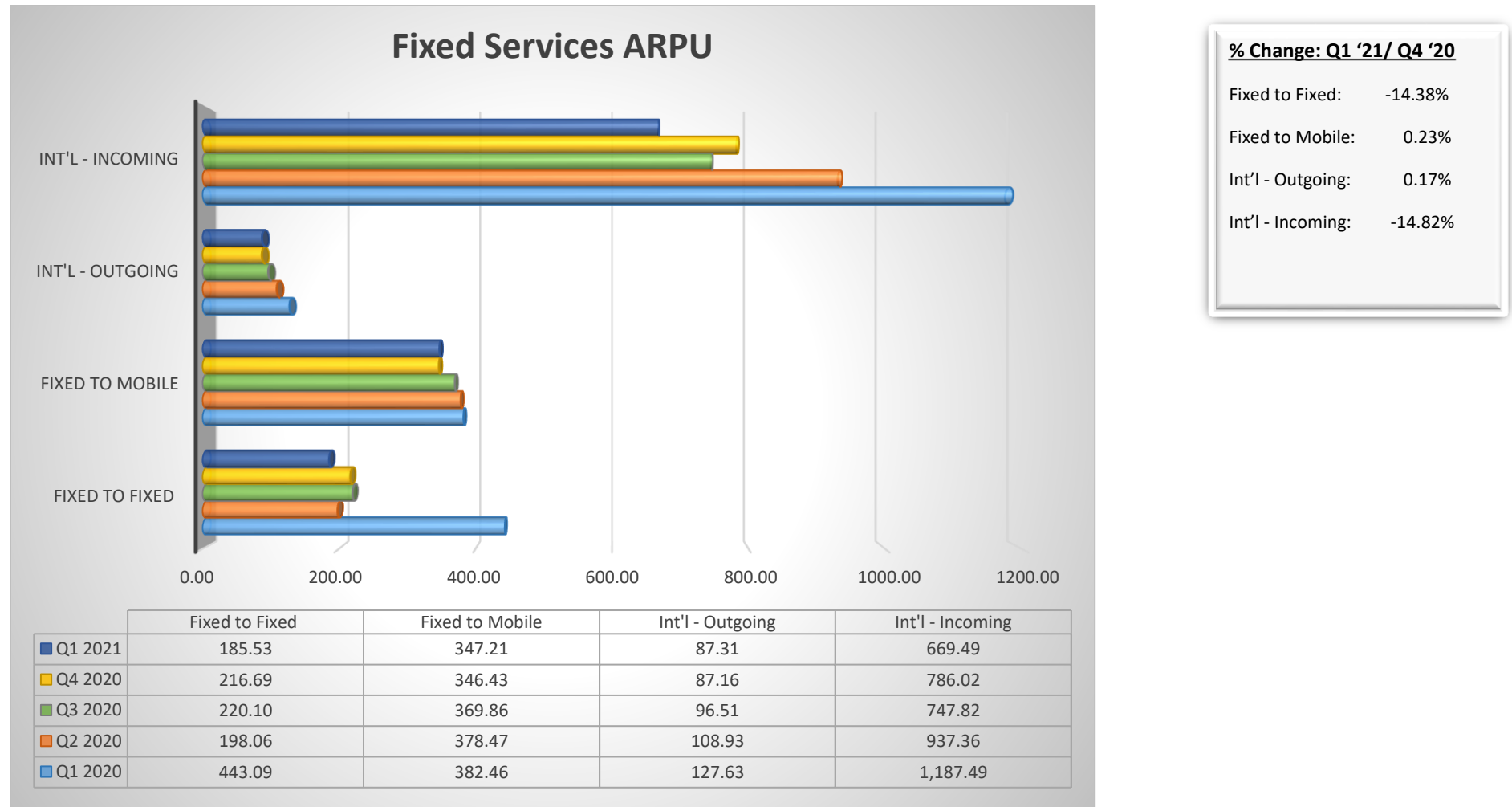
Fixed to Mobile: 1.93%

Total International: -11.85%

Int'l - Outgoing: 1.88%

Int'l - Incoming: -13.37%

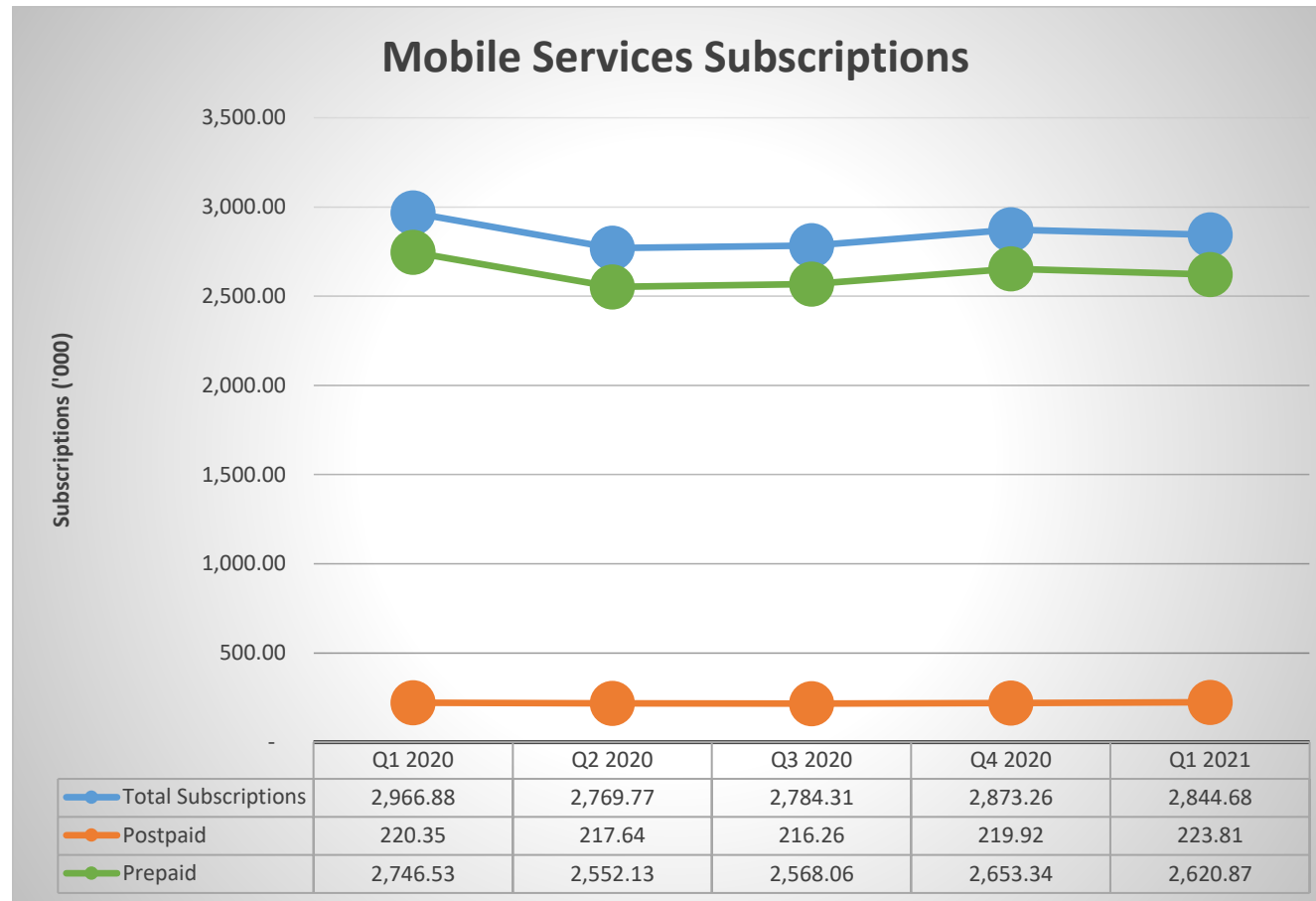
Figure 4: Fixed Services Average Revenue per User (ARPU)





# Mobile Market Data

Figure 5: Mobile Services Subscriptions



**% Change: Q1 '21/ Q4 '20**

Total Subscriptions: -0.99%

Postpaid: 1.77%

Prepaid: -1.22%

Figure 6: Mobile Traffic

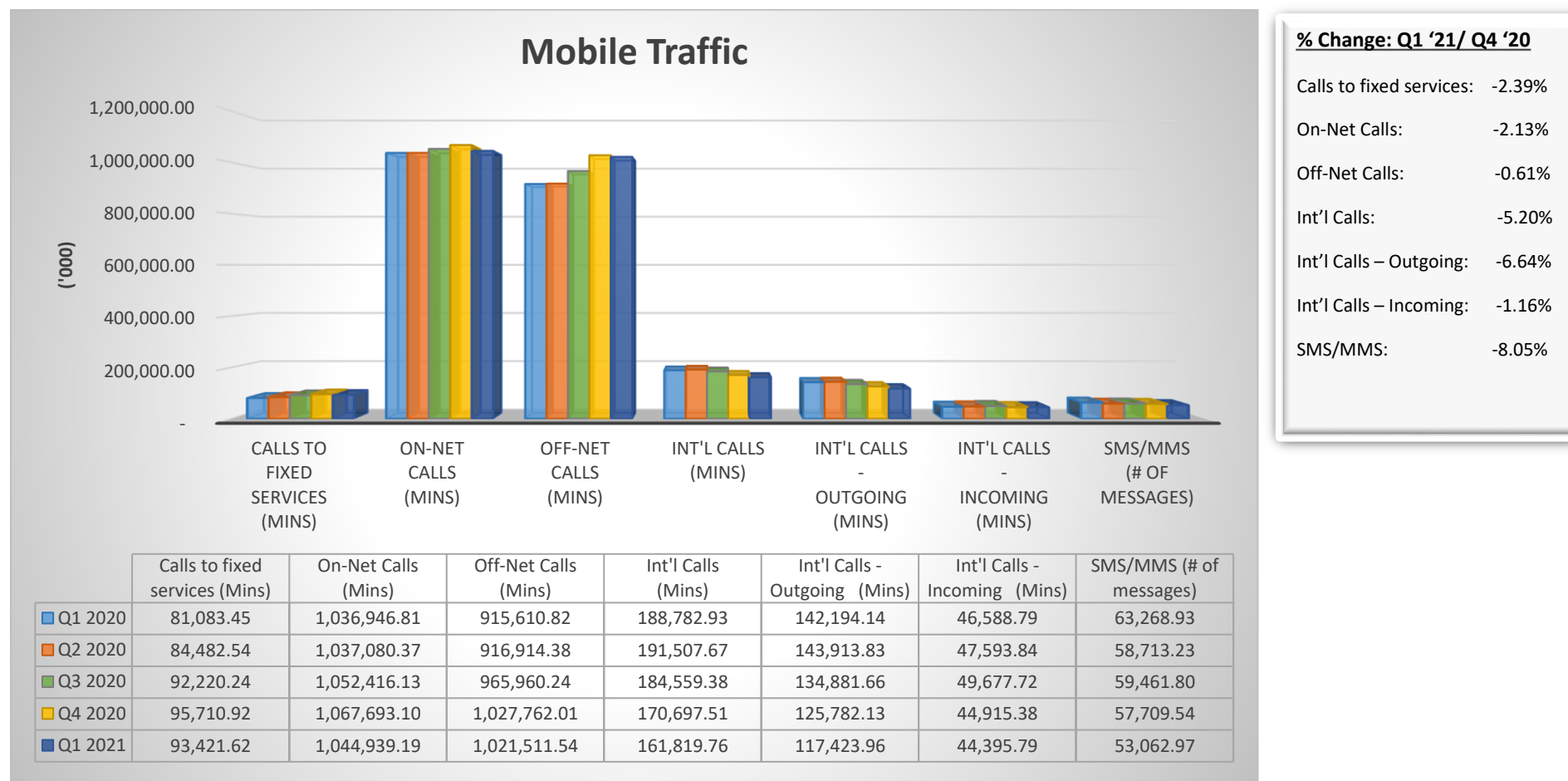
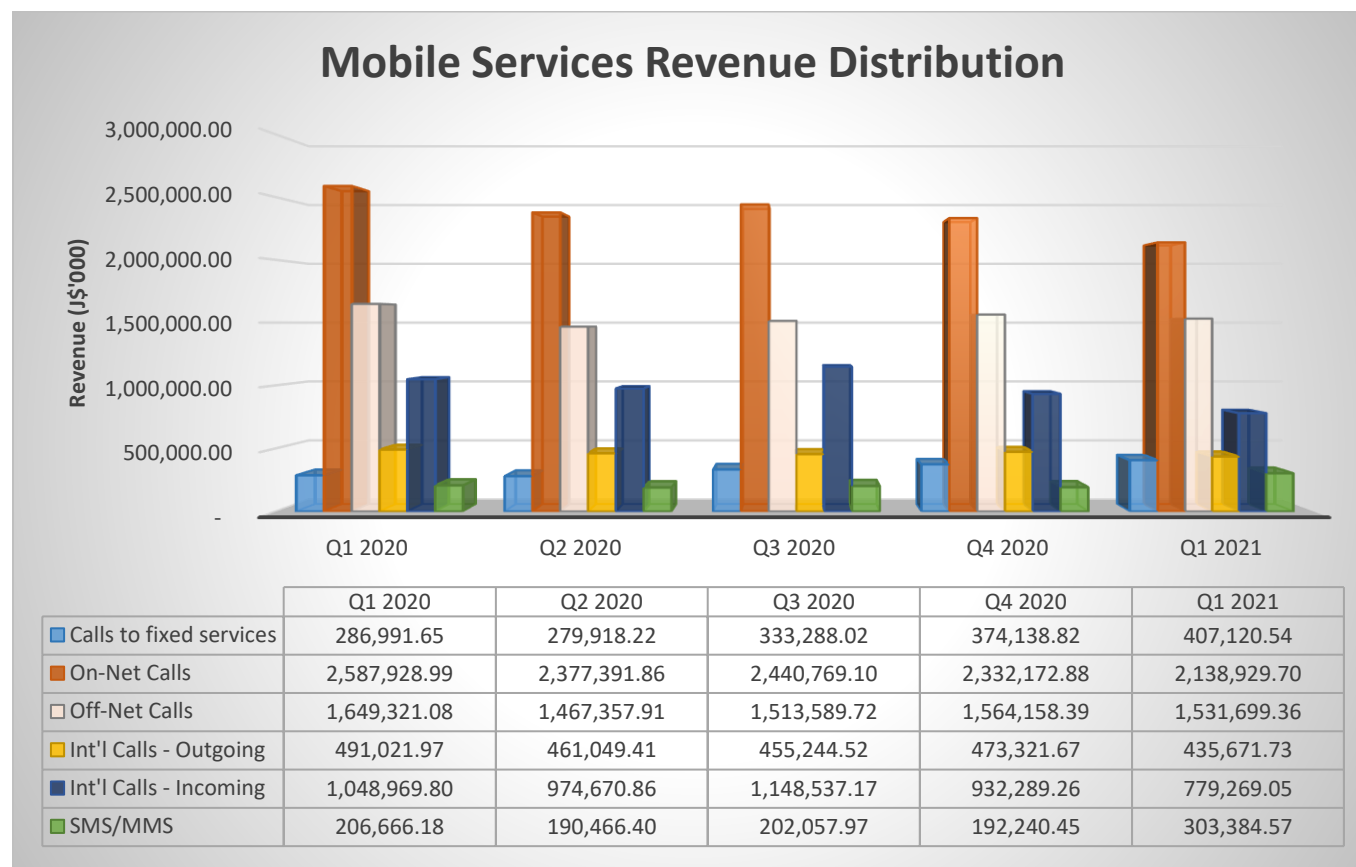


Figure 7: Mobile Services Revenue Distribution\*

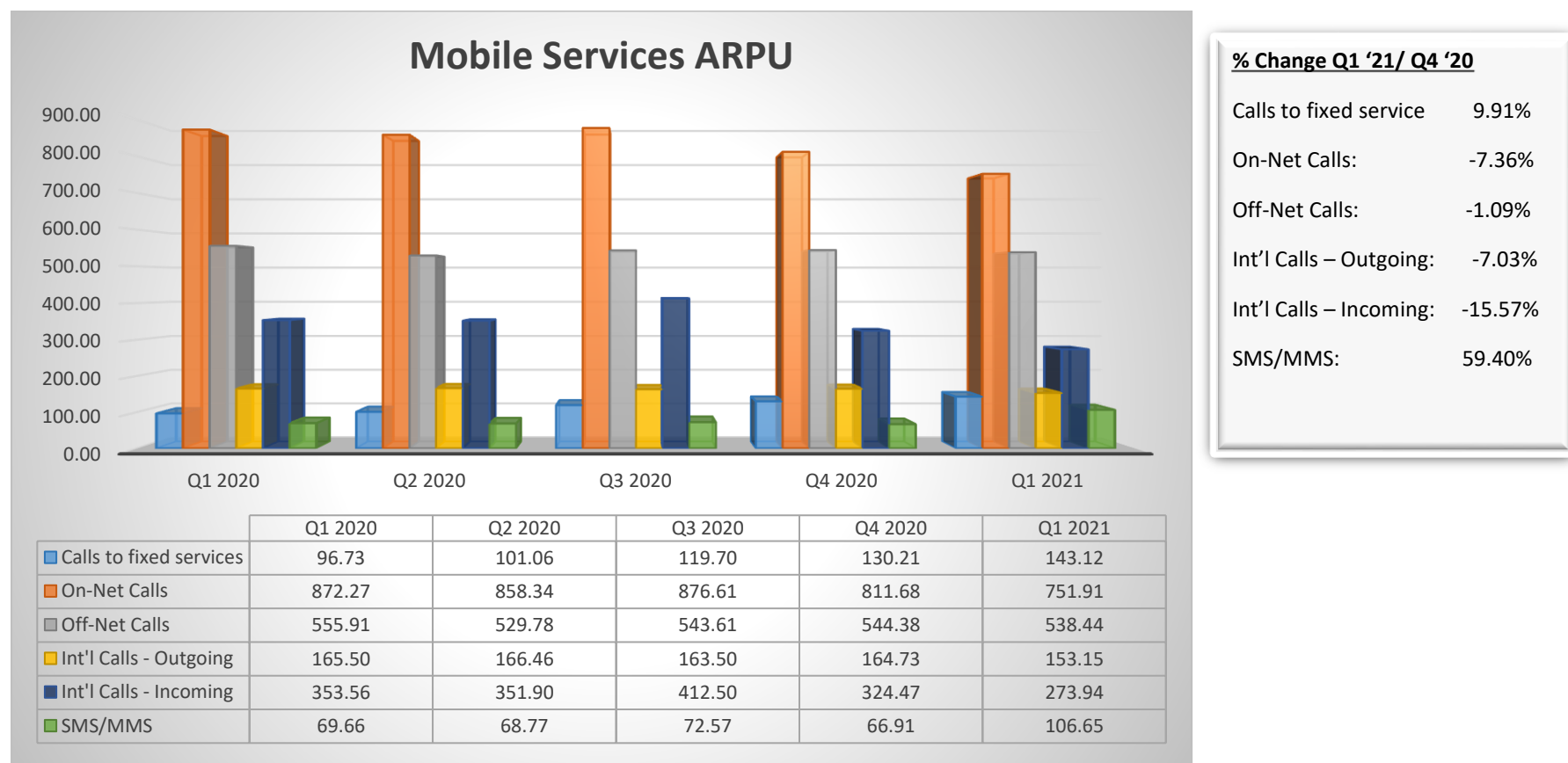


**% Change: Q1 '21/ Q4 '20**

|                         |         |
|-------------------------|---------|
| Calls to Fixed services | 8.82%   |
| On-Net Calls:           | -8.29%  |
| Off-Net Calls:          | -2.08%  |
| Int'l Calls – Outgoing: | -7.95%  |
| Int'l Calls – Incoming: | -16.41% |
| SMS/MMS:                | 57.82%  |

\* The significant increase recorded for revenues arising from “SMS/MMS” traffic in the Q1 2021 quarter was due to an adjustment that was done by one operator to figures previously reported for 2020.

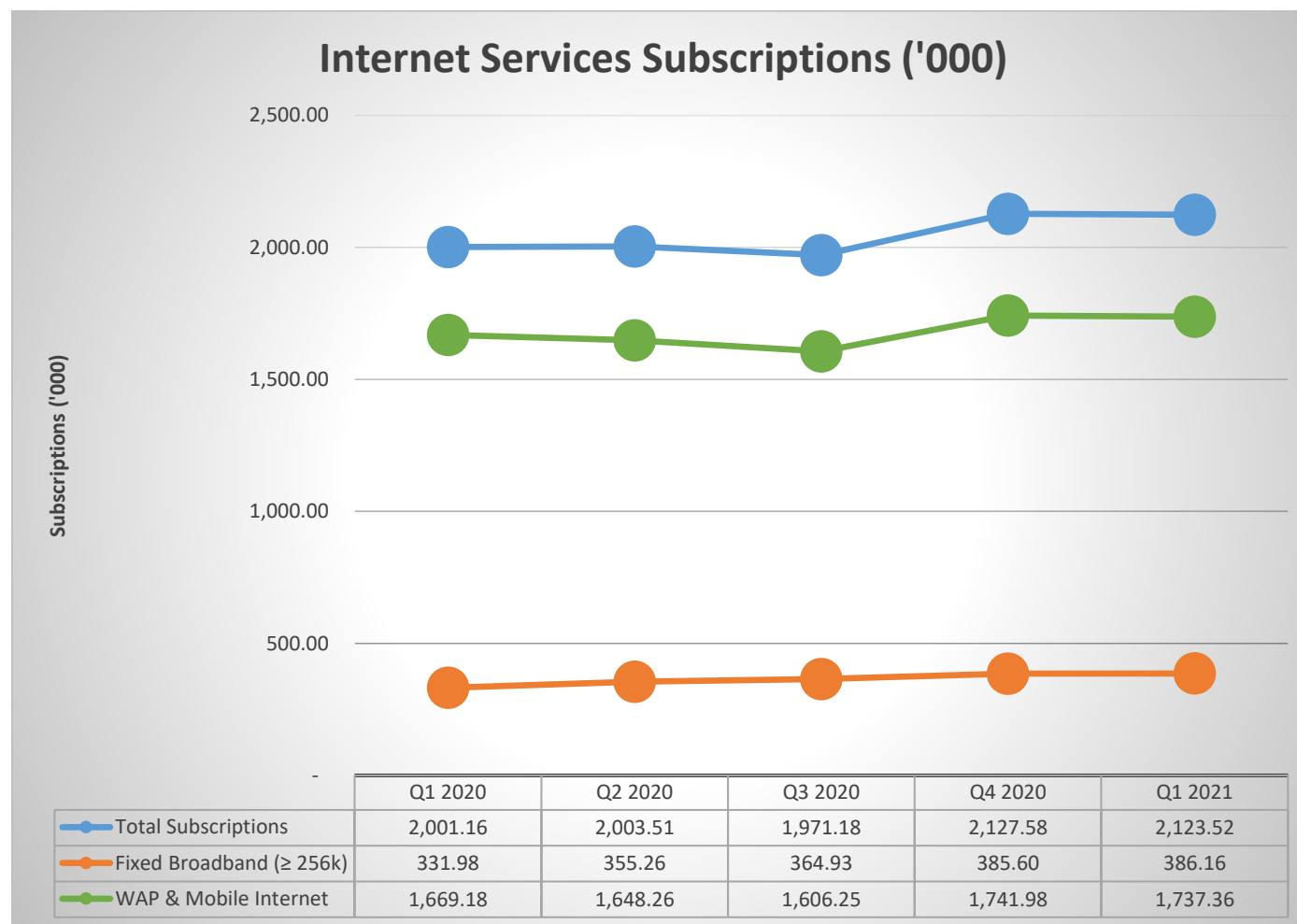
Figure 8: Mobile Services Average Revenue per User (ARPU)\*



\* The significant increase recorded for ARPU arising from “SMS/MMS” traffic in the Q1 2021 quarter was due to an adjustment that was done by one operator to figures previously reported for 2020.

# Internet Market Data

Figure 9: Internet Services Subscriptions



**% Change Q1 '21/ Q4 '20**

Total Subscriptions: -0.19%

Fixed Broadband (≥ 256k): 0.14%

WAP & Mobile Internet: -0.27%

# Industry Penetration and Concentration



### Penetration Rate<sup>1</sup>

| Penetration Rate                               | Q1 2020 | Q2 2020 | Q3 2020 | Q4 2020 | Q1 2021 |
|------------------------------------------------|---------|---------|---------|---------|---------|
| Fixed Subscription Penetration Rate            | 14.6%   | 15.2%   | 15.4%   | 16.0%   | 16.2%   |
| Mobile Subscription Penetration Rate           | 108.5%  | 101.3%  | 101.8%  | 105.1%  | 104.0%  |
| Fixed Broadband Subscription Penetration Rate  | 12.1%   | 13.0%   | 13.4%   | 14.1%   | 14.1%   |
| Mobile Broadband Subscription Penetration Rate | 61.1%   | 60.3%   | 58.8%   | 63.7%   | 63.5%   |
| Total Broadband Subscription Penetration Rate  | 73.2%   | 73.3%   | 72.1%   | 77.8%   | 77.7%   |

### Concentration Ratio (Herfindahl-Hirschman Index)<sup>2</sup>

| Herfindahl-Hirschman Index (HHI) | Q1 2020 | Q2 2020 | Q3 2020 | Q4 2020 | Q1 2021 |
|----------------------------------|---------|---------|---------|---------|---------|
| Fixed HHI                        | 4,725   | 4,673   | 4,707   | 4,666   | 4,591   |
| Mobile HHI                       | 5,204   | 5,150   | 5,141   | 5,151   | 5,123   |
| Fixed Broadband HHI              | 3,673   | 3,704   | 3,716   | 3,718   | 3,712   |
| Mobile Broadband HHI             | 5,311   | 5,435   | 5,227   | 5,237   | 5,182   |

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

<sup>2</sup> Calculated using subscription data.

# Appendix

| Fixed Market                                | Q1 2020   | Q2 2020   | Q3 2020   | Q4 2020   | Q1 2021   | % Change<br>Q1 '21/Q4<br>'20 | % Change<br>Q1 '21/Q1<br>'20 |
|---------------------------------------------|-----------|-----------|-----------|-----------|-----------|------------------------------|------------------------------|
| Total Subscriptions ('000)                  | 398.31    | 415.04    | 422.04    | 436.25    | 443.68    | 1.70                         | 11.39                        |
| Fixed to Fixed ('000 minutes)               | 62,766.54 | 52,769.98 | 51,403.49 | 52,264.20 | 50,032.93 | -4.27                        | -20.29                       |
| Fixed to Mobile Calls ('000 minutes)        | 58,986.08 | 54,125.33 | 58,182.71 | 53,939.88 | 63,881.47 | 18.43                        | 8.30                         |
| Total International Calls ('000 minutes)    | 26,087.44 | 20,827.93 | 17,682.48 | 18,911.52 | 16,269.09 | -13.97                       | -37.64                       |
| Outgoing International Calls ('000 minutes) | 4,682.98  | 4,344.12  | 3,817.86  | 3,777.63  | 3,614.70  | -4.31                        | -22.81                       |
| Incoming International Calls ('000 minutes) | 21,404.46 | 16,483.81 | 13,864.61 | 15,133.90 | 12,654.39 | -16.38                       | -40.88                       |
| Total Revenue (J\$' million)                | 2,490.16  | 2,341.85  | 2,354.01  | 2,412.93  | 2,369.75  | -1.79                        | -4.84                        |

| Mobile Market                         | Q1 2020      | Q2 2020      | Q3 2020      | Q4 2020      | Q1 2021      | % Change<br>Q1 '21/Q4<br>'20 | % Change<br>Q1 '21/Q1<br>'20 |
|---------------------------------------|--------------|--------------|--------------|--------------|--------------|------------------------------|------------------------------|
| Total Subscriptions ('000)            | 2,966.88     | 2,769.77     | 2,784.31     | 2,873.26     | 2,844.68     | -0.99                        | -4.12                        |
| Calls to Fixed Services               | 81,083.45    | 84,482.54    | 92,220.24    | 95,710.92    | 93,421.62    | -2.39                        | 15.22                        |
| On-Net Calls ('000 minutes)           | 1,036,946.81 | 1,037,080.37 | 1,052,416.13 | 1,067,693.10 | 1,044,939.19 | -2.13                        | 0.77                         |
| Off-Net Calls ('000 minutes)          | 915,610.82   | 916,914.38   | 965,960.24   | 1,027,762.01 | 1,021,511.54 | -0.61                        | 11.57                        |
| International calls                   | 188,782.93   | 191,507.67   | 184,559.38   | 170,697.51   | 161,819.76   | -5.20                        | -14.28                       |
| Outgoing International ('000 minutes) | 142,194.14   | 143,913.83   | 134,881.66   | 125,782.13   | 117,423.96   | -6.64                        | -17.42                       |
| Incoming International ('000 minutes) | 46,588.79    | 47,593.84    | 49,677.72    | 44,915.38    | 44,395.79    | -1.16                        | -4.71                        |
| SMS/MMS traffic ('000 # of messages)  | 63,268.93    | 58,713.23    | 59,461.80    | 57,709.54    | 53,062.97    | -8.05                        | -16.13                       |
| Total Revenue (J\$ ' million)         | 13,023.50    | 12,110.46    | 12,958.42    | 12,819.32    | 12,597.10    | -1.73                        | -3.27                        |

| Internet Market              | Q1 2020  | Q2 2020  | Q3 2020  | Q4 2020  | Q1 2021   | % Change<br>Q1 '21/Q4 '20 | % Change<br>Q1 '21/Q1 '20 |
|------------------------------|----------|----------|----------|----------|-----------|---------------------------|---------------------------|
| Total Subscriptions ('000)   | 2,001.16 | 2,003.51 | 1,971.18 | 2,127.58 | 2,123.52  | -0.19                     | 6.11                      |
| Fixed Broadband (≥256K)      | 331.98   | 355.26   | 364.93   | 385.60   | 386.16    | 0.14                      | 16.32                     |
| WAP & Mobile Internet        | 1,669.18 | 1,648.26 | 1,606.25 | 1,741.98 | 1,737.36  | -0.27                     | 4.08                      |
| Total Revenue (J\$' million) | 9,117.43 | 9,274.19 | 9,603.67 | 9,983.15 | 10,211.36 | 2.29                      | 12.00                     |

| <b>Penetration Rate</b>                               | <b>Q1 2020</b> | <b>Q2 2020</b> | <b>Q3 2020</b> | <b>Q4 2020</b> | <b>Q1 2021</b> |
|-------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|
| <b>Fixed Subscription Penetration Rate</b>            | 14.6%          | 15.2%          | 15.4%          | 16.0%          | 16.2%          |
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| <b>Total Broadband Subscription Penetration Rate</b>  | 73.2%          | 73.3%          | 72.1%          | 77.8%          | 77.7%          |

| <b>Herfindahl-Hirschman Index (HHI)</b> | <b>Q1 2020</b> | <b>Q2 2020</b> | <b>Q3 2020</b> | <b>Q4 2020</b> | <b>Q1 2021</b> |
|-----------------------------------------|----------------|----------------|----------------|----------------|----------------|
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| <b>Mobile Broadband HHI</b>             | 5,311          | 5,435          | 5,227          | 5,237          | 5,182          |