
Office of Utilities Regulation

Telecommunications Market Information Report

April - June 2021



OFFICE OF UTILITIES REGULATION

Telecommunications Market Information Report: April - June 2021

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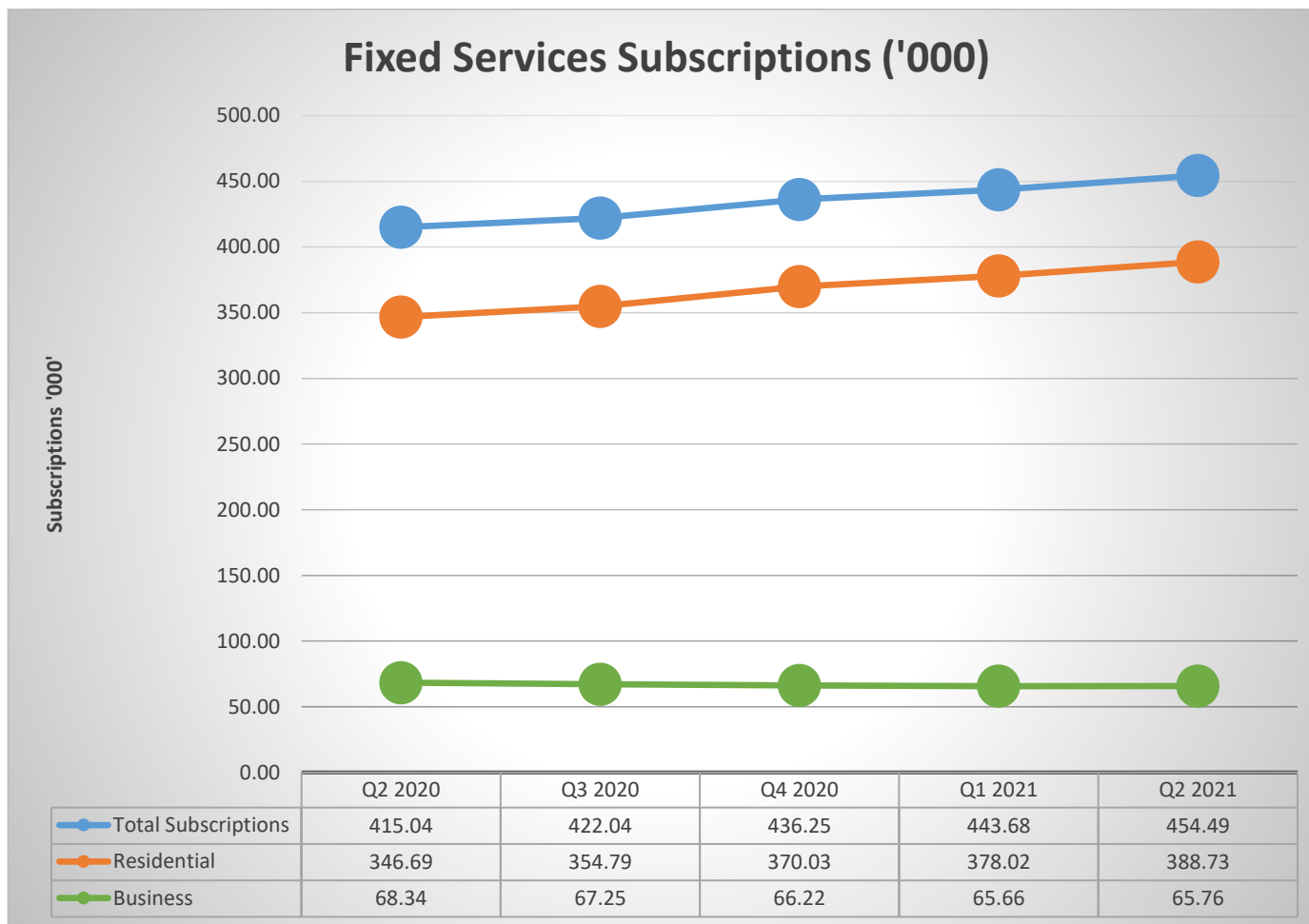
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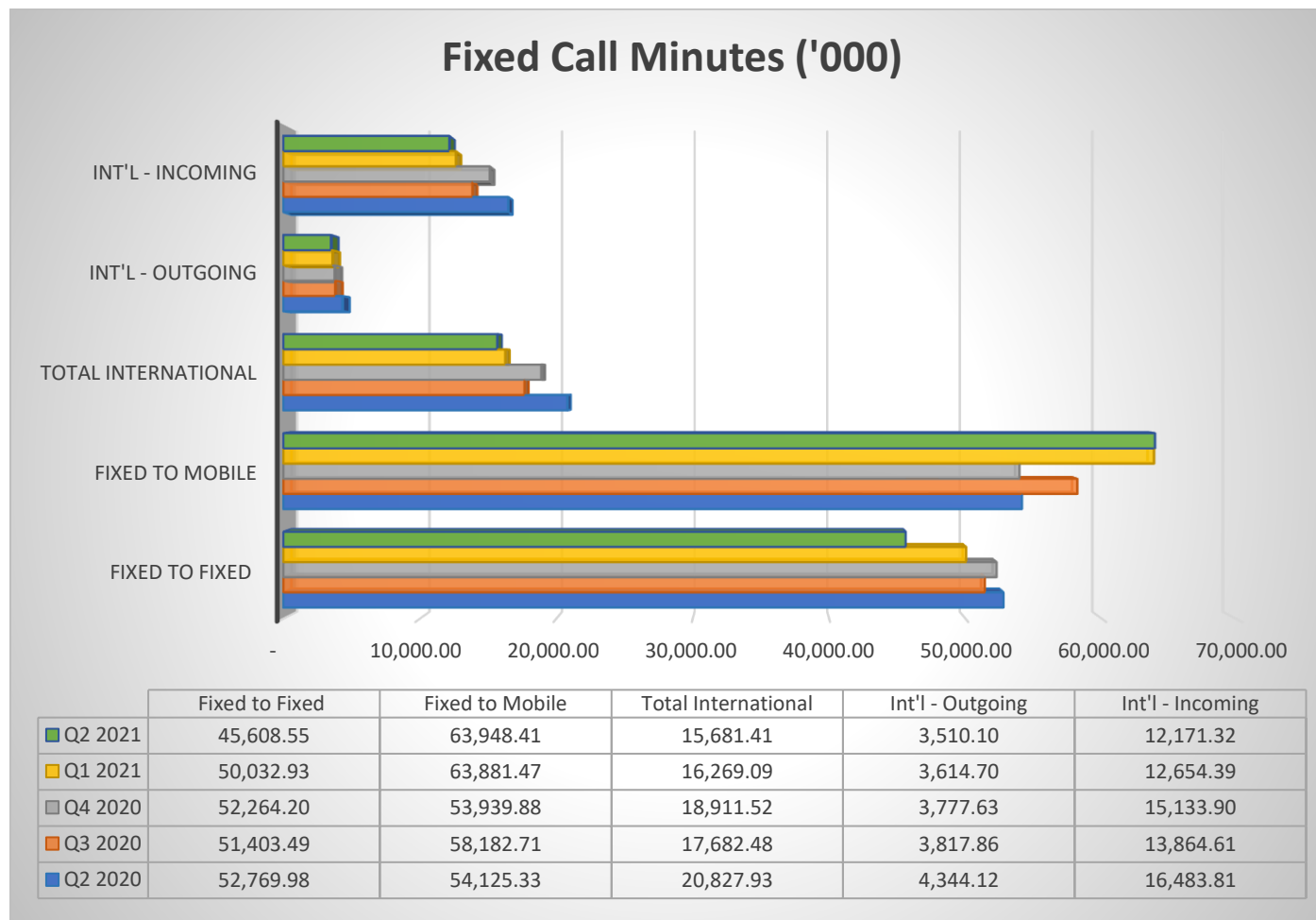
Fixed Market Data

Figure 1: Fixed Services Subscriptions



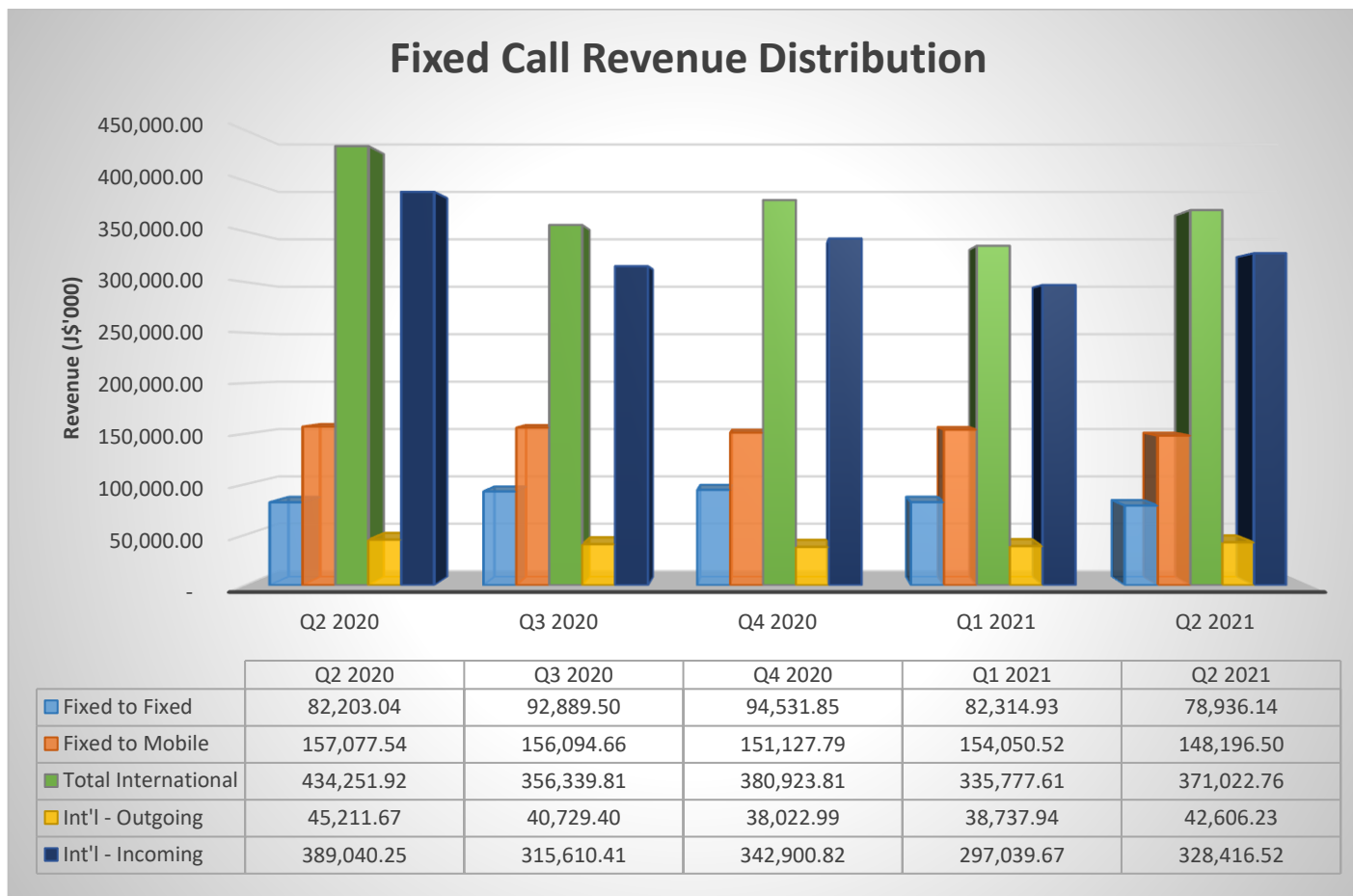
<u>% Change: Q2 '21/Q1 '21</u>	
Total Subscriptions:	2.44%
Residential:	2.83%
Business:	0.17%

Figure 2: Fixed Call Minutes



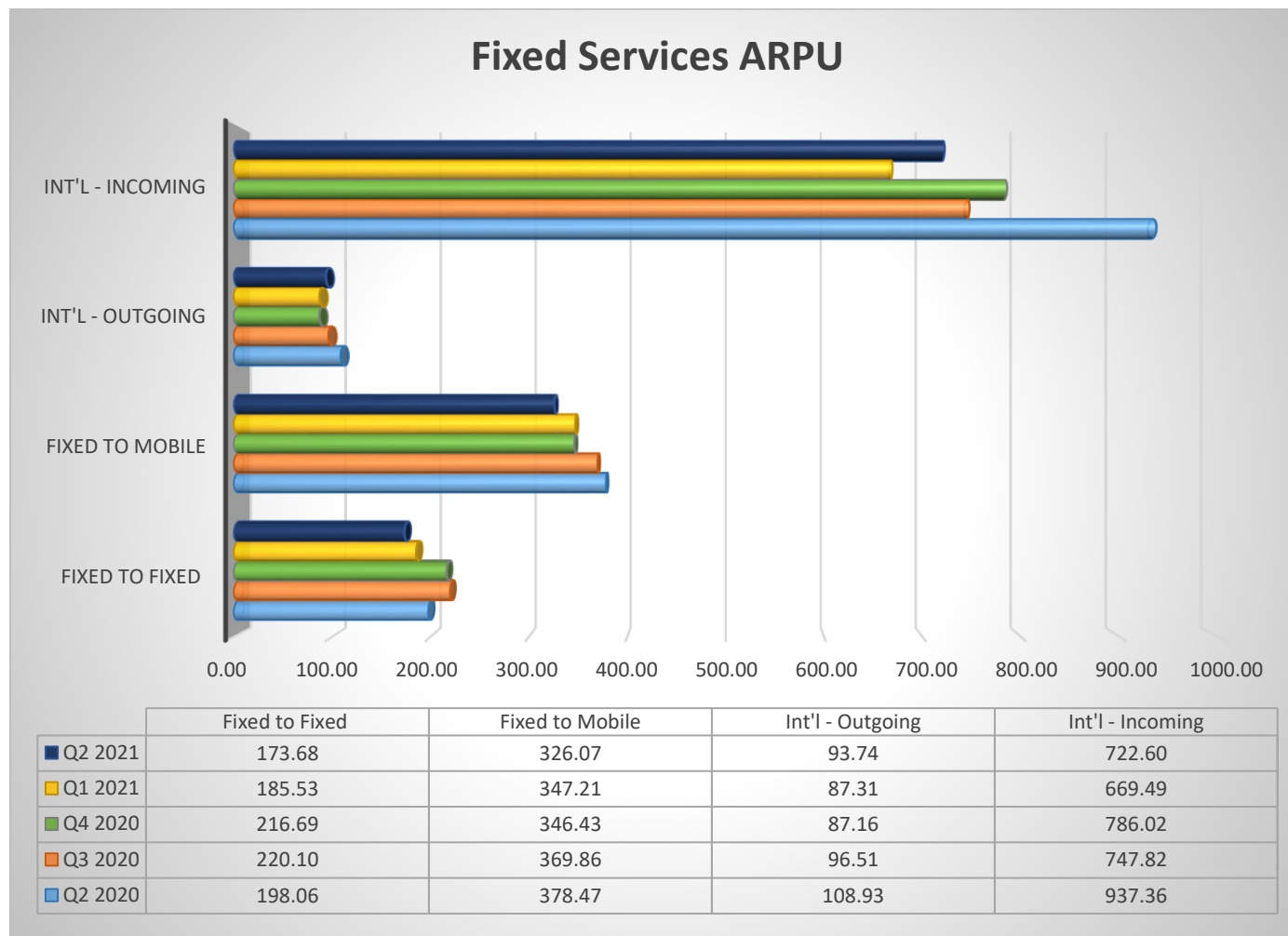
% change: Q2 '21/Q1 '21	
Fixed to Fixed:	-8.84%
Fixed to Mobile:	0.10%
Total International:	-3.61%
Int'l - Outgoing:	-2.89%
Int'l - Incoming:	-3.82%

Figure 3: Fixed Call Revenue Distribution



<u>% change Q2 '21/Q1 '21</u>	
Fixed to Fixed:	-4.10%
Fixed to Mobile:	-3.80%
Total International:	10.50%
Int'l - Outgoing:	9.99%
Int'l - Incoming:	10.56%

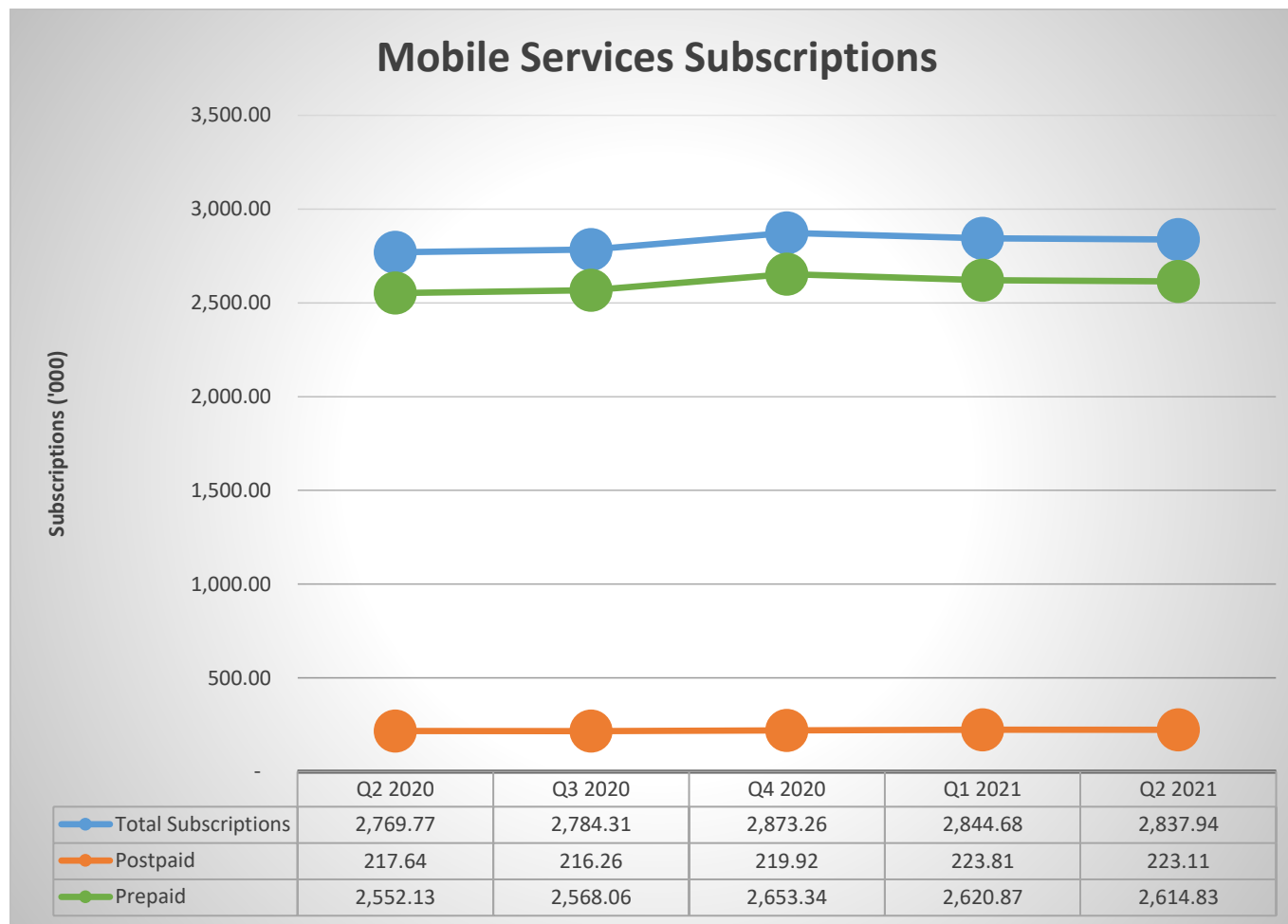
Figure 4: Fixed Services Average Revenue per User (ARPU)



<u>% Change: Q2 '21/Q1 '21</u>	
Fixed to Fixed:	-6.39%
Fixed to Mobile:	-6.09%
Int'l - Outgoing:	7.37%
Int'l - Incoming:	7.93%

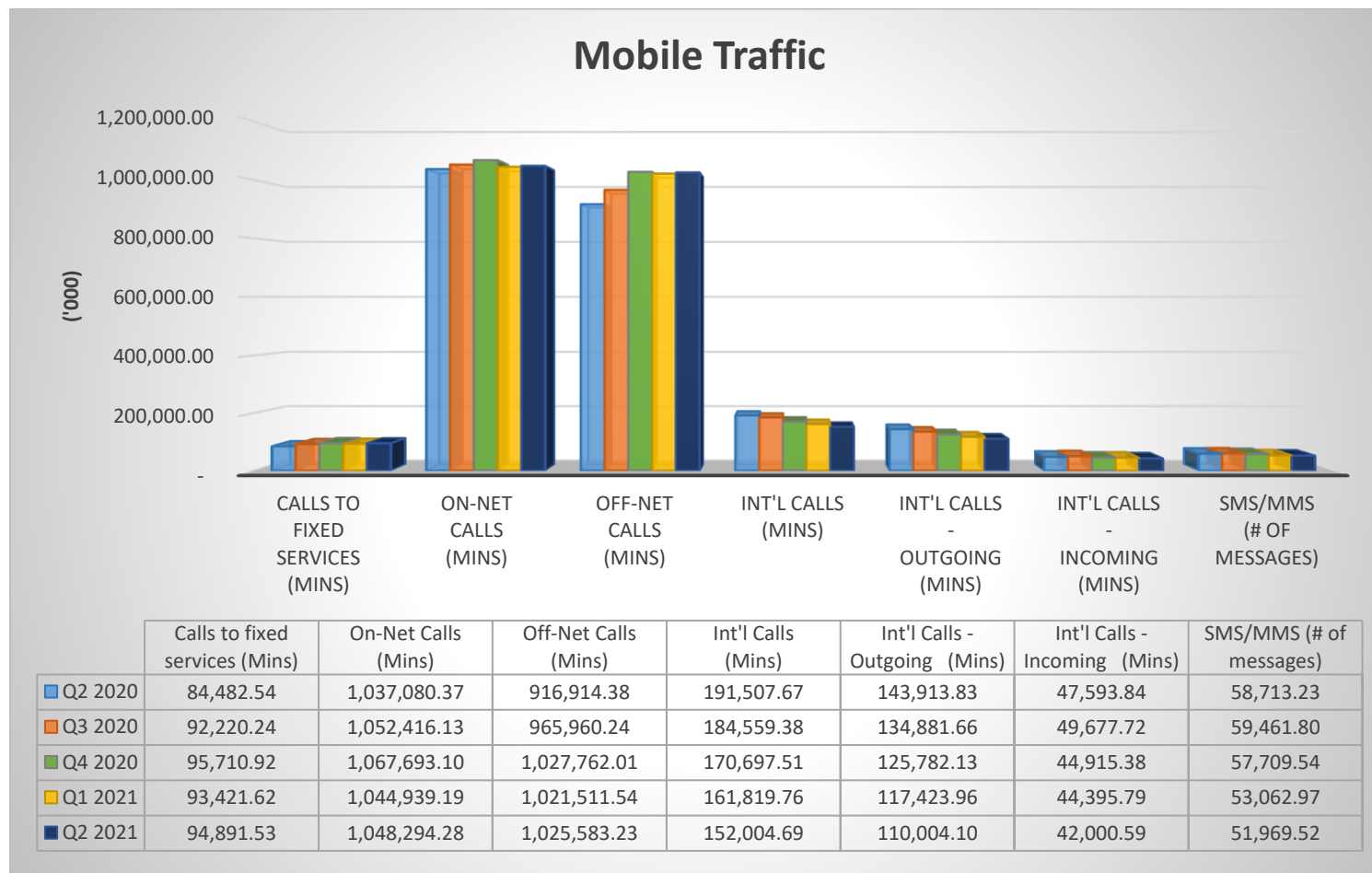
Mobile Market Data

Figure 5: Mobile Services Subscriptions



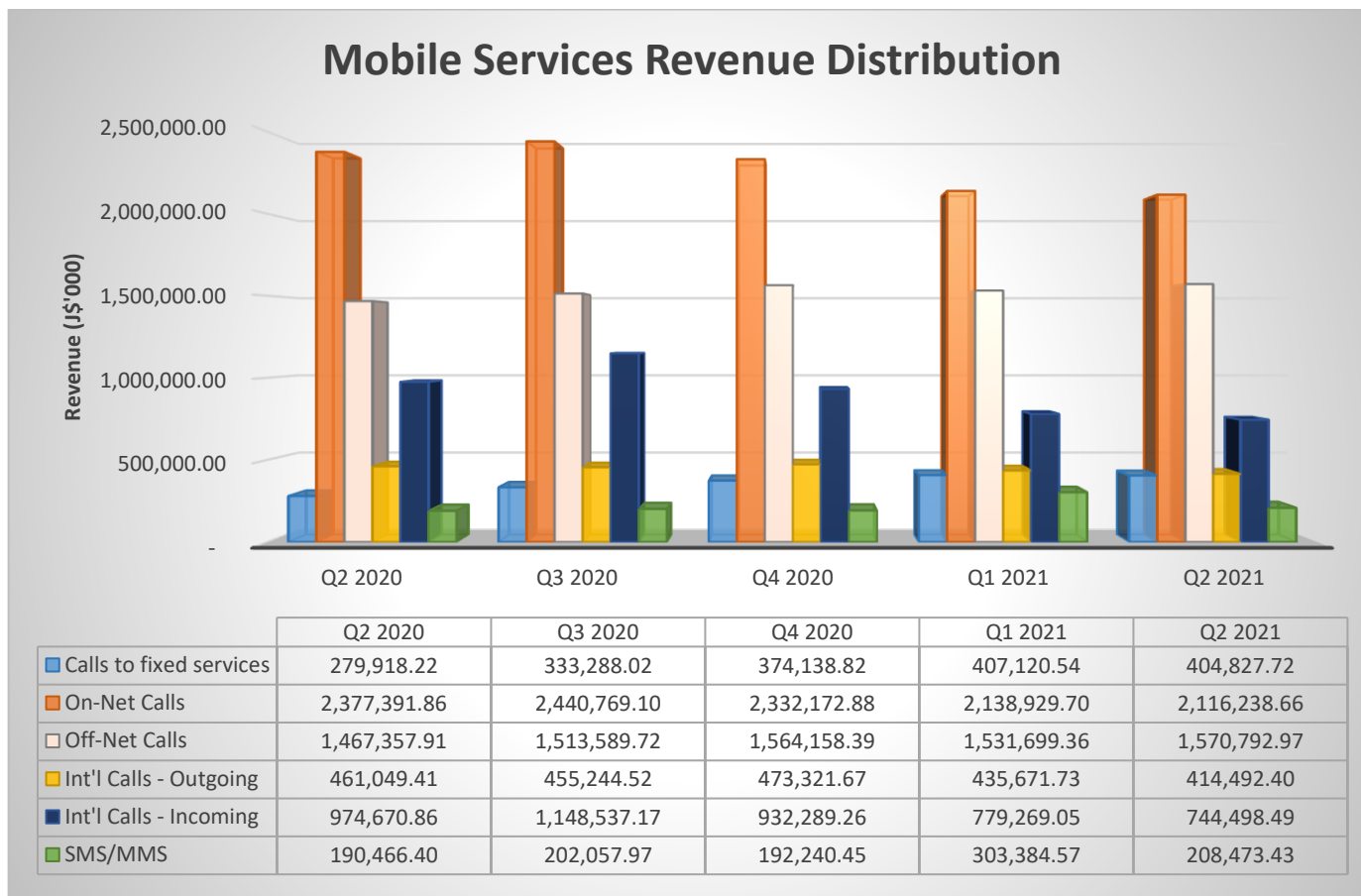
<u>% Change: Q2 '21/Q1 '21</u>	
Total Subscriptions:	-0.24%
Postpaid:	-0.31%
Prepaid:	-0.23%

Figure 6: Mobile Traffic



% Change: Q2 '21/Q1 '21	
Calls to fixed services:	1.57%
On-Net Calls:	0.32%
Off-Net Calls:	0.40%
Int'l Calls:	-6.07%
Int'l Calls – Outgoing:	-6.32%
Int'l Calls – Incoming:	-5.40%
SMS/MMS:	-2.06%

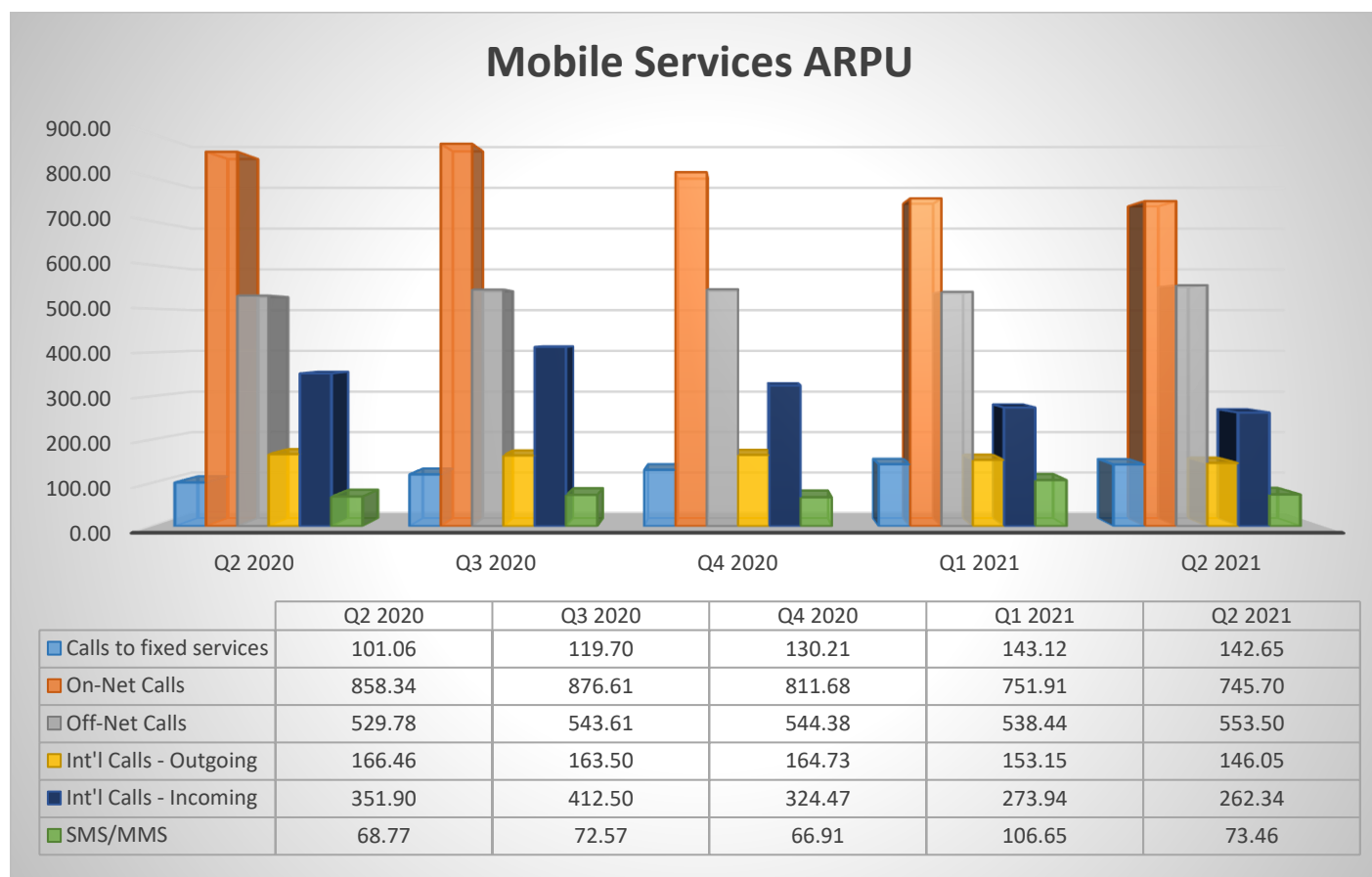
Figure 7: Mobile Services Revenue Distribution*



% Change: Q2 '21/Q1 '21	
Calls to Fixed services	-0.56%
On-Net Calls:	-1.06%
Off-Net Calls:	2.55%
Int'l Calls – Outgoing:	-4.86%
Int'l Calls – Incoming:	-4.46%
SMS/MMS:	-31.28%

* The significant decrease recorded for revenues arising from “SMS/MMS” traffic in the Q2 2021 quarter was impacted by the significant increase in the category as reported in the Q1 2021 quarter and explained to have been due to an adjustment that was done by one operator to figures previously reported for the year 2020.

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

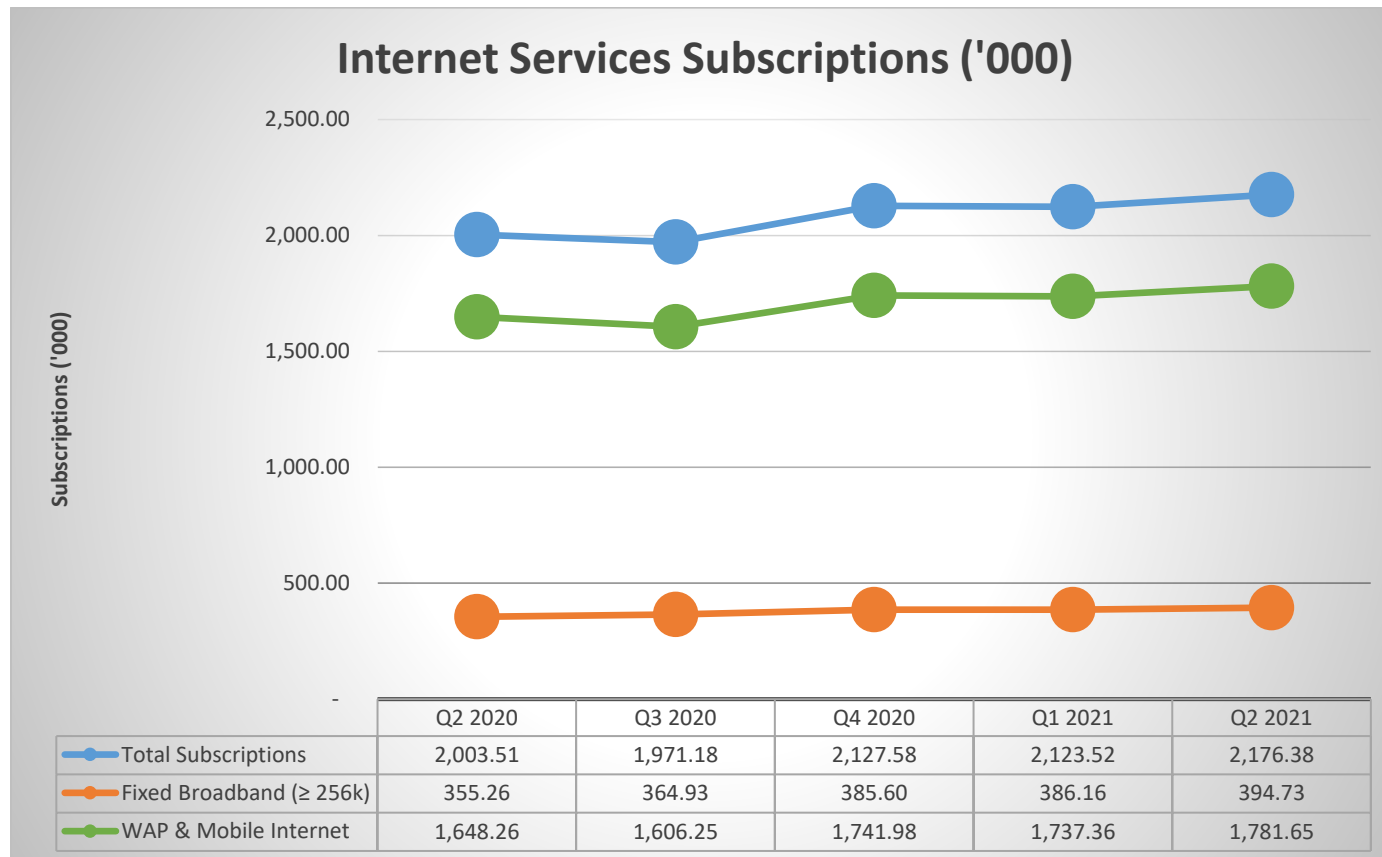


<u>% Change: Q2 '21/Q1 '21</u>	
Calls to fixed service	-0.33%
On-Net Calls:	-0.83%
Off-Net Calls:	2.80%
Int'l Calls – Outgoing:	-4.64%
Int'l Calls – Incoming:	-4.24%
SMS/MMS:	-31.12%

* The significant decrease recorded for ARPU arising from “SMS/MMS” traffic in the Q2 2021 quarter was impacted by the significant increase in the category as reported in the Q1 2021 quarter and explained to have been due to an adjustment that was done by one operator to figures previously reported for the year 2020.

Internet Market Data

Figure 9: Internet Services Subscriptions



<u>% Change: Q2 '21/Q1 '21</u>	
Total Subscriptions:	2.49%
Fixed Broadband (≥ 256k):	2.22%
WAP & Mobile Internet:	2.55%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Fixed Subscription Penetration Rate	15.2%	15.4%	16.0%	16.2%	16.6%
Mobile Subscription Penetration Rate	101.3%	101.8%	105.1%	104.0%	103.8%
Fixed Broadband Subscription Penetration Rate	13.0%	13.4%	14.1%	14.1%	14.4%
Mobile Broadband Subscription Penetration Rate	60.3%	58.8%	63.7%	63.5%	65.2%
Total Broadband Subscription Penetration Rate	73.3%	72.1%	77.8%	77.7%	79.6%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Fixed HHI	4,673	4,707	4,666	4,591	4,400
Mobile HHI	5,150	5,141	5,151	5,123	5,077
Fixed Broadband HHI	3,704	3,716	3,718	3,712	3,730
Mobile Broadband HHI	5,435	5,227	5,237	5,182	5,107

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	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	% Change Q2 '21/Q1 '21	% Change Q2 '21/Q2 '20
Total Subscriptions ('000)	415.04	422.04	436.25	443.68	454.49	2.44	9.51
Fixed to Fixed ('000 minutes)	52,769.98	51,403.49	52,264.20	50,032.93	45,608.55	-8.84	-13.57
Fixed to Mobile Calls ('000 minutes)	54,125.33	58,182.71	53,939.88	63,881.47	63,948.41	0.10	18.15
Total International Calls ('000 minutes)	20,827.93	17,682.48	18,911.52	16,269.09	15,681.41	-3.61	-24.71
Outgoing International Calls ('000 minutes)	4,344.12	3,817.86	3,777.63	3,614.70	3,510.10	-2.89	-19.20
Incoming International Calls ('000 minutes)	16,483.81	13,864.61	15,133.90	12,654.39	12,171.32	-3.82	-26.16
Total Revenue (J\$' million)	2,341.85	2,354.01	2,412.93	2,369.75	2,533.00	6.89	8.16

Mobile Market	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	% Change Q2 '21/Q1 '21	% Change Q2 '21/Q2 '20
Total Subscriptions ('000)	2,769.77	2,784.31	2,873.26	2,844.68	2,837.94	-0.24	2.46
Calls to Fixed Services	84,482.54	92,220.24	95,710.92	93,421.62	94,891.53	1.57	12.32
On-Net Calls ('000 minutes)	1,037,080.37	1,052,416.13	1,067,693.10	1,044,939.19	1,048,294.28	0.32	1.08
Off-Net Calls ('000 minutes)	916,914.38	965,960.24	1,027,762.01	1,021,511.54	1,025,583.23	0.40	11.85
International calls	191,507.67	184,559.38	170,697.51	161,819.76	152,004.69	-6.07	-20.63
Outgoing International ('000 minutes)	143,913.83	134,881.66	125,782.13	117,423.96	110,004.10	-6.32	-23.56
Incoming International ('000 minutes)	47,593.84	49,677.72	44,915.38	44,395.79	42,000.59	-5.40	-11.75
SMS/MMS traffic ('000 # of messages)	58,713.23	59,461.80	57,709.54	53,062.97	51,969.52	-2.06	-11.49
Total Revenue (J\$ ' million)	12,110.46	12,958.42	12,819.32	12,597.10	12,985.40	3.08	7.22

Internet Market	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	% Change Q2 '21/Q1 '21	% Change Q2 '21/Q2 '20
Total Subscriptions ('000)	2,003.51	1,971.18	2,127.58	2,123.52	2,176.38	2.49	8.63
Fixed Broadband (≥256K)	355.26	364.93	385.60	386.16	394.73	2.22	11.11
WAP & Mobile Internet	1,648.26	1,606.25	1,741.98	1,737.36	1,781.65	2.55	8.09
Total Revenue (J\$' million)	9,274.19	9,603.67	9,983.15	10,211.36	10,610.97	3.91	14.41

Penetration Rate	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
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