
Office of Utilities Regulation

Telecommunications Market Information Report July - September 2021



OFFICE OF UTILITIES REGULATION

Telecommunications Market Information Report: July - September 2021

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

twitter: theOURja

Legal Disclaimer

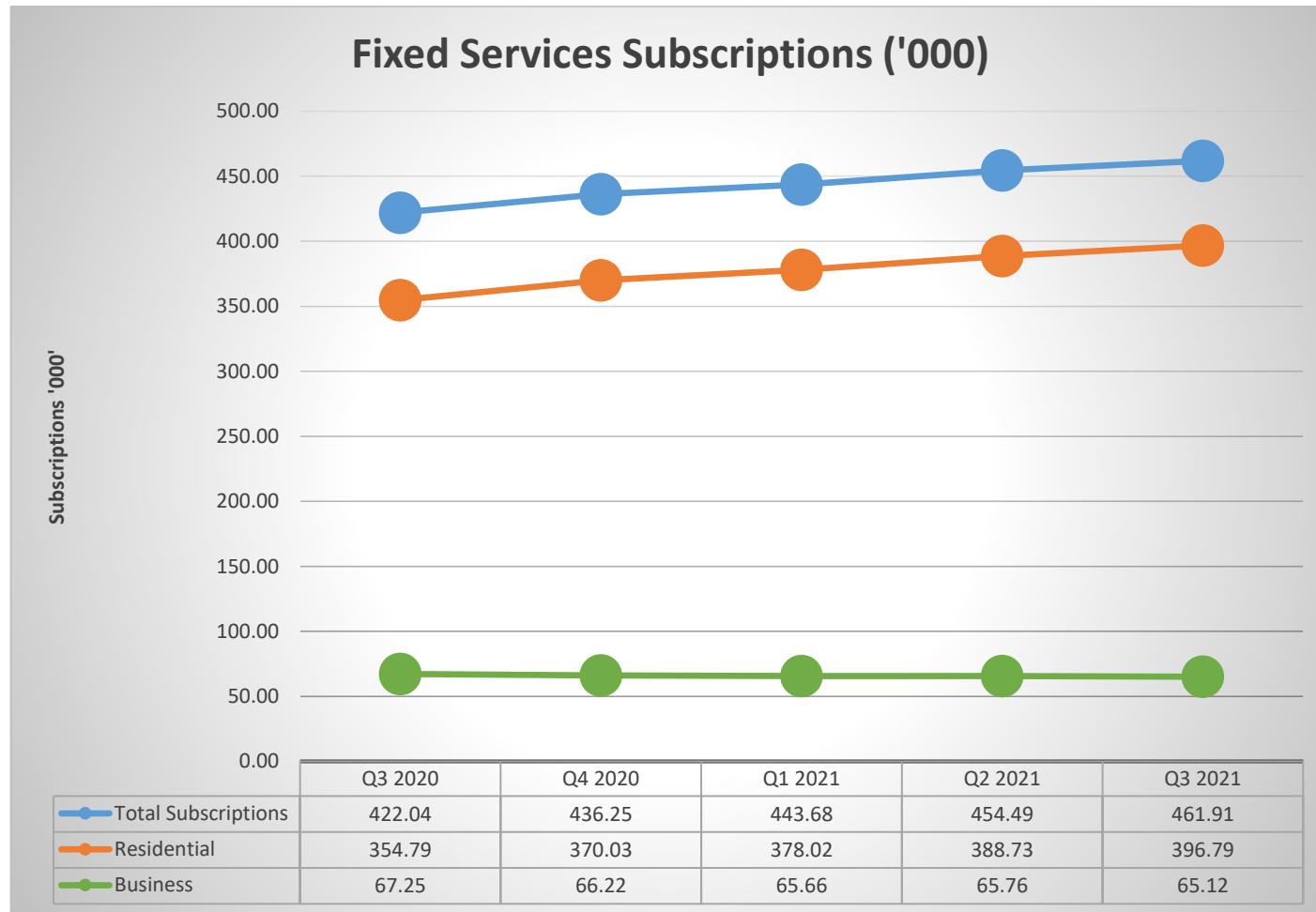
The information and statistical material contained in this document were obtained from various sources available to the Office of Utilities Regulation (OUR) at the time of publication and are intended for information purposes only. The OUR does not give any warranty as to the accuracy, completeness or reliability of the information and shall not be liable for any loss or damage howsoever caused arising out of any use or reliance upon any statements made or information contained in this document.

Contents

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

Fixed Market Data

Figure 1: Fixed Services Subscriptions



% Change: Q3 '21/Q2 '21

Total Subscriptions: 1.63%

Residential: 2.07%

Business: -0.97%

Figure 2: Fixed Call Minutes

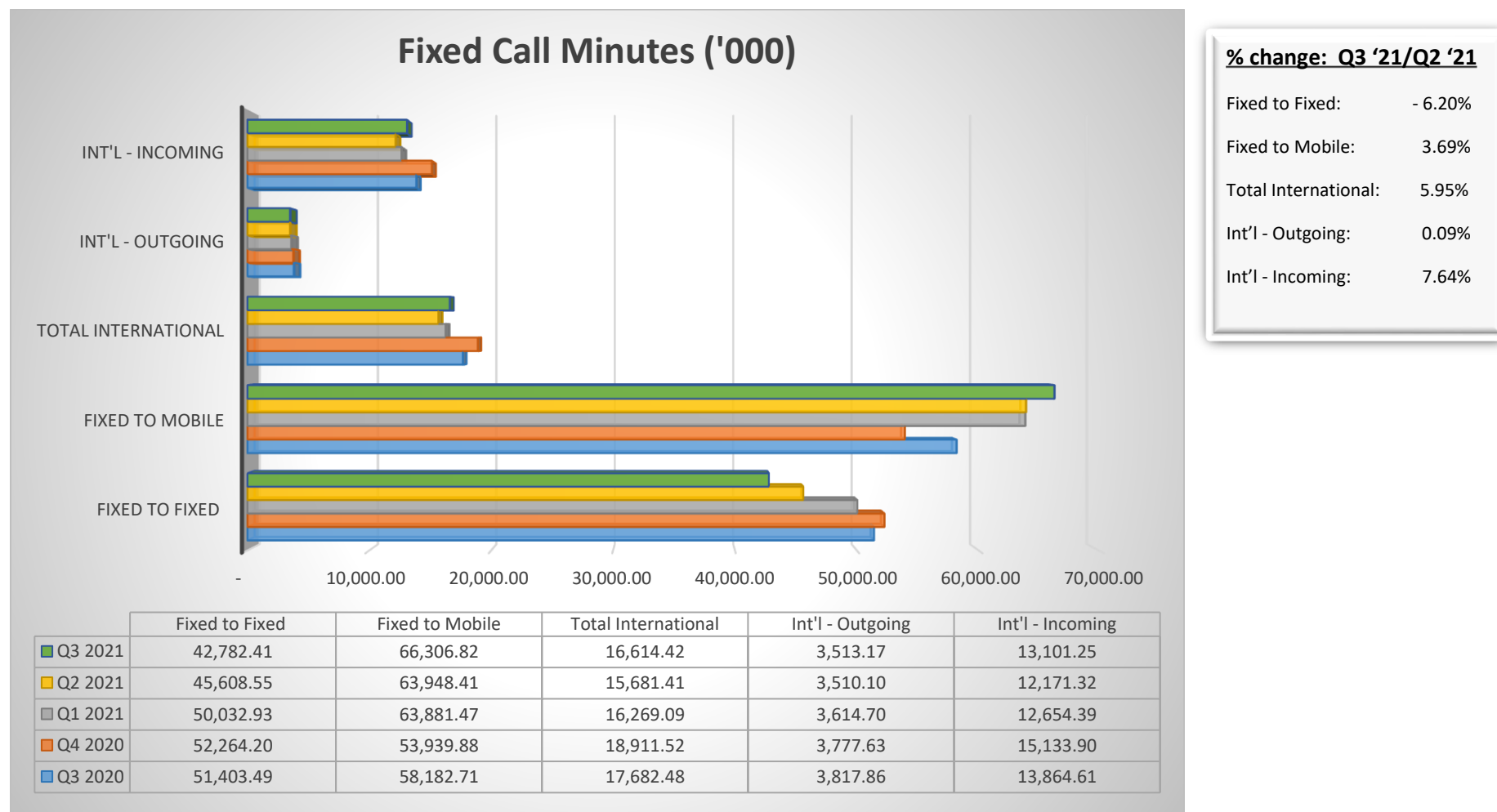


Figure 3: Fixed Call Revenue Distribution

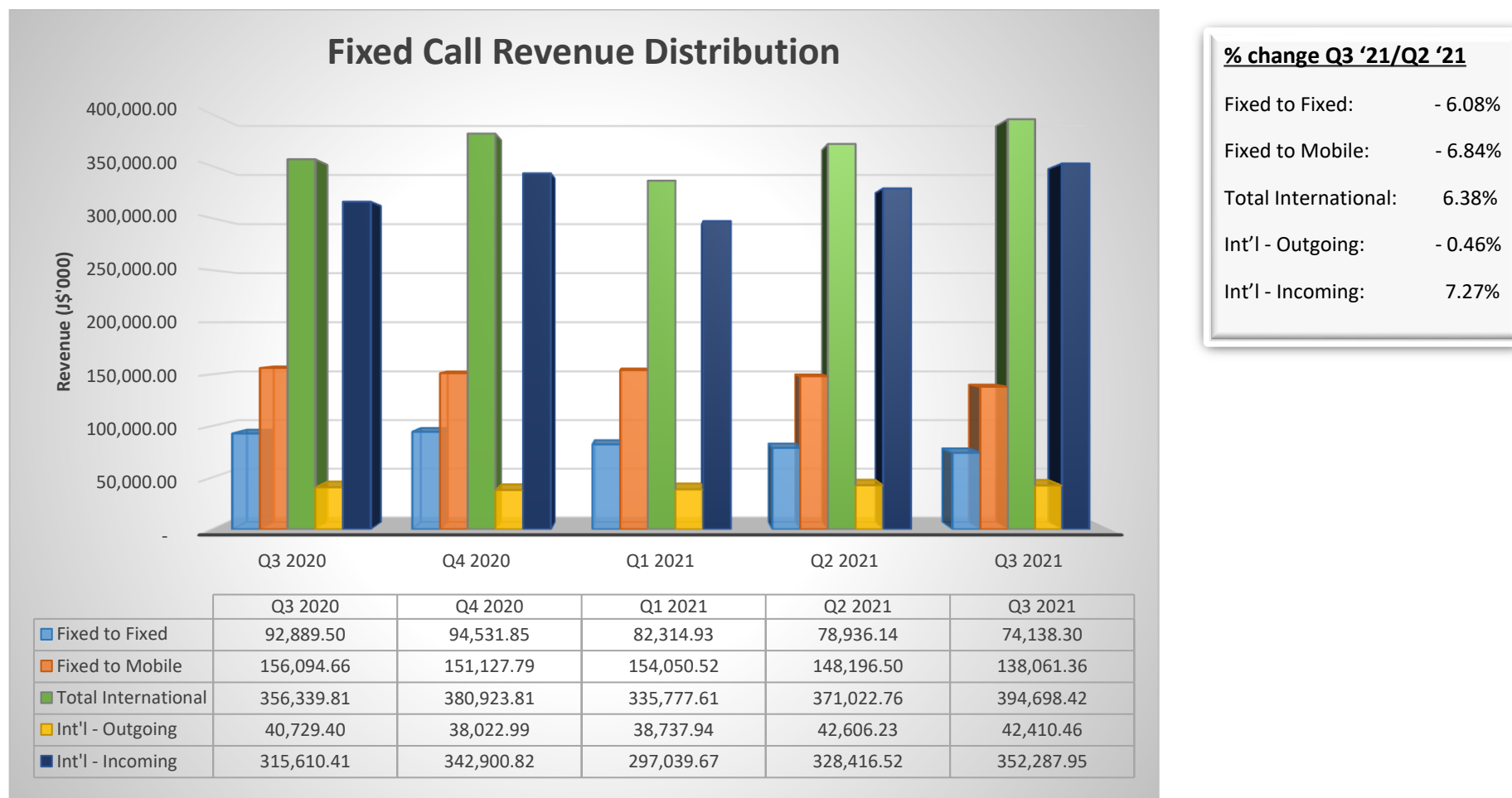
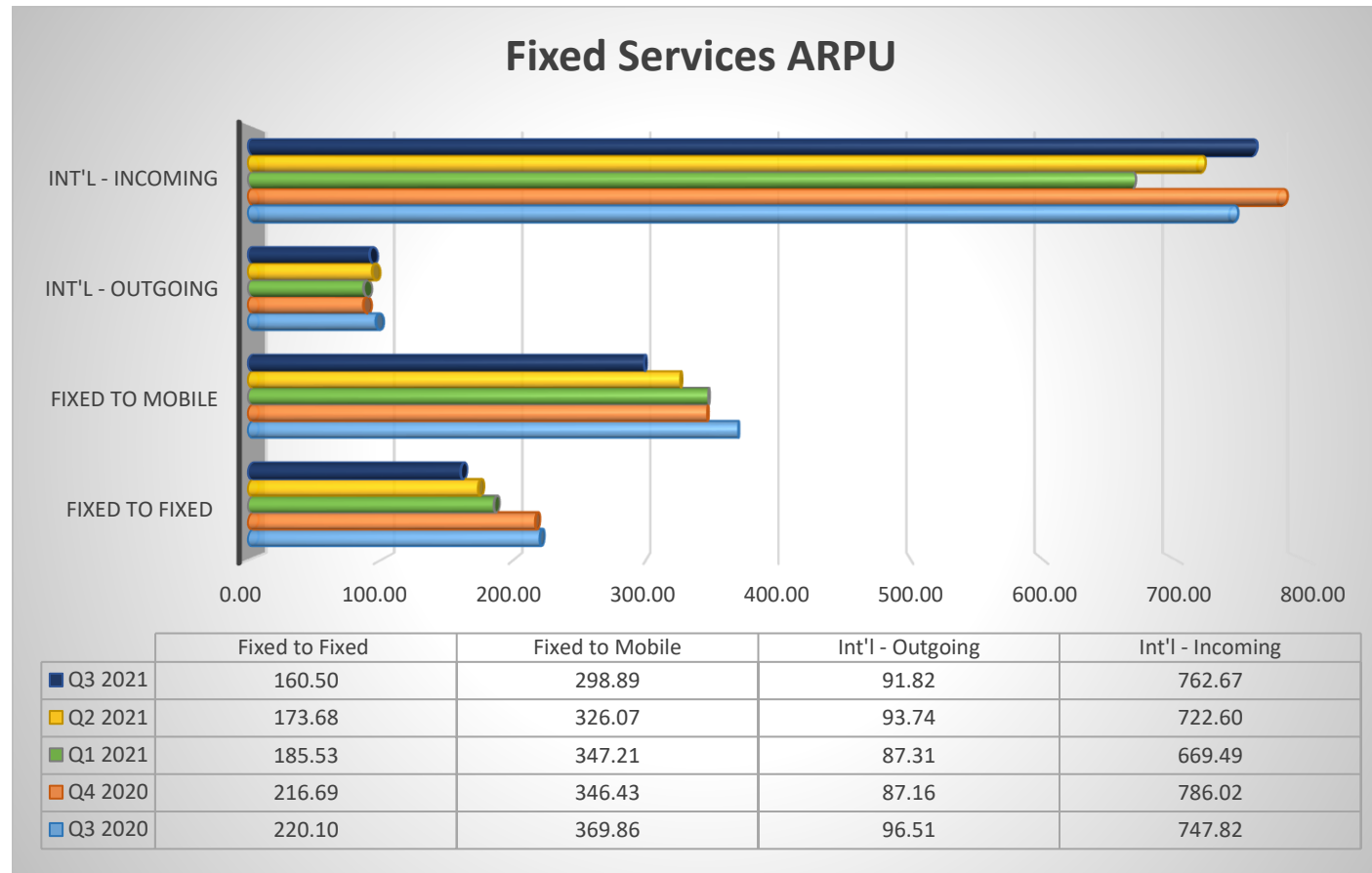


Figure 4: Fixed Services Average Revenue per User (ARPU)



% Change: Q3 '21/Q2 '21

Fixed to Fixed:	- 7.59%
Fixed to Mobile:	- 8.34%
Int'l - Outgoing:	- 2.06%
Int'l - Incoming:	5.55%

Mobile Market Data

Figure 5: Mobile Services Subscriptions

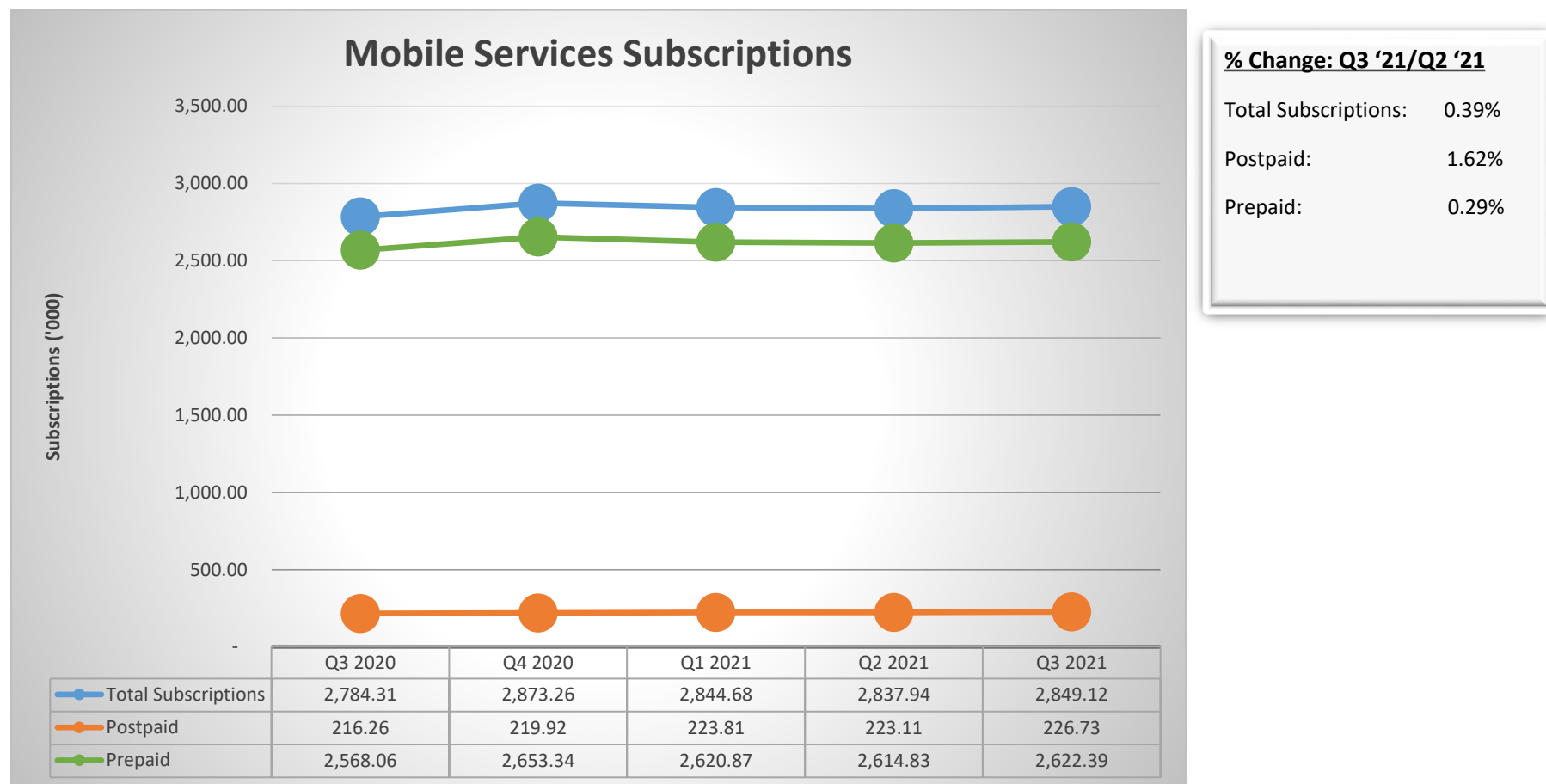
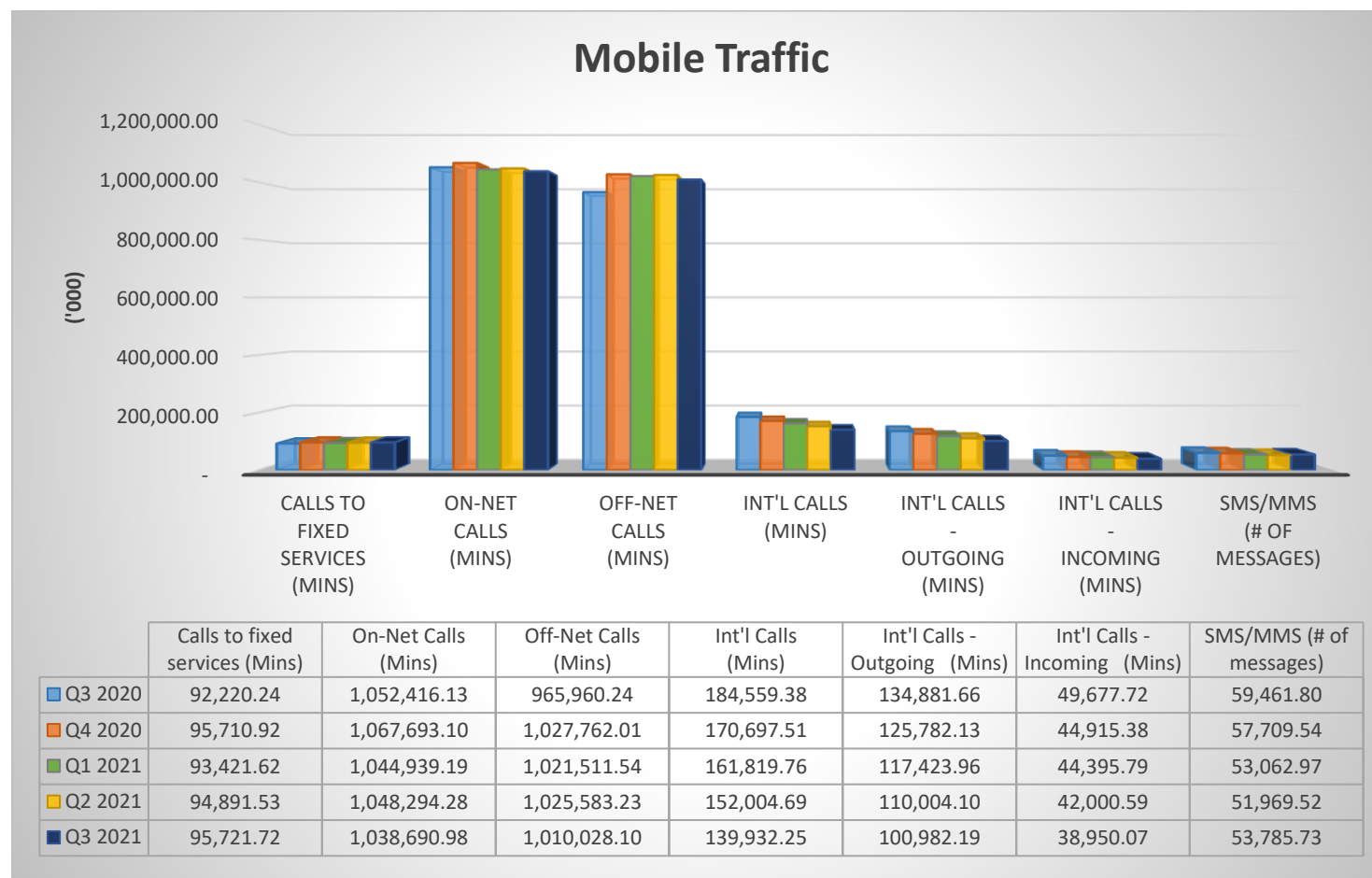


Figure 6: Mobile Traffic



% Change: Q3 '21/Q2 '21

Calls to fixed services:	0.87%
On-Net Calls:	- 0.92%
Off-Net Calls:	- 1.52%
Int'l Calls:	- 7.94%
Int'l Calls – Outgoing:	- 8.20%
Int'l Calls – Incoming:	- 7.26%
SMS/MMS:	3.49%

Figure 7: Mobile Services Revenue Distribution

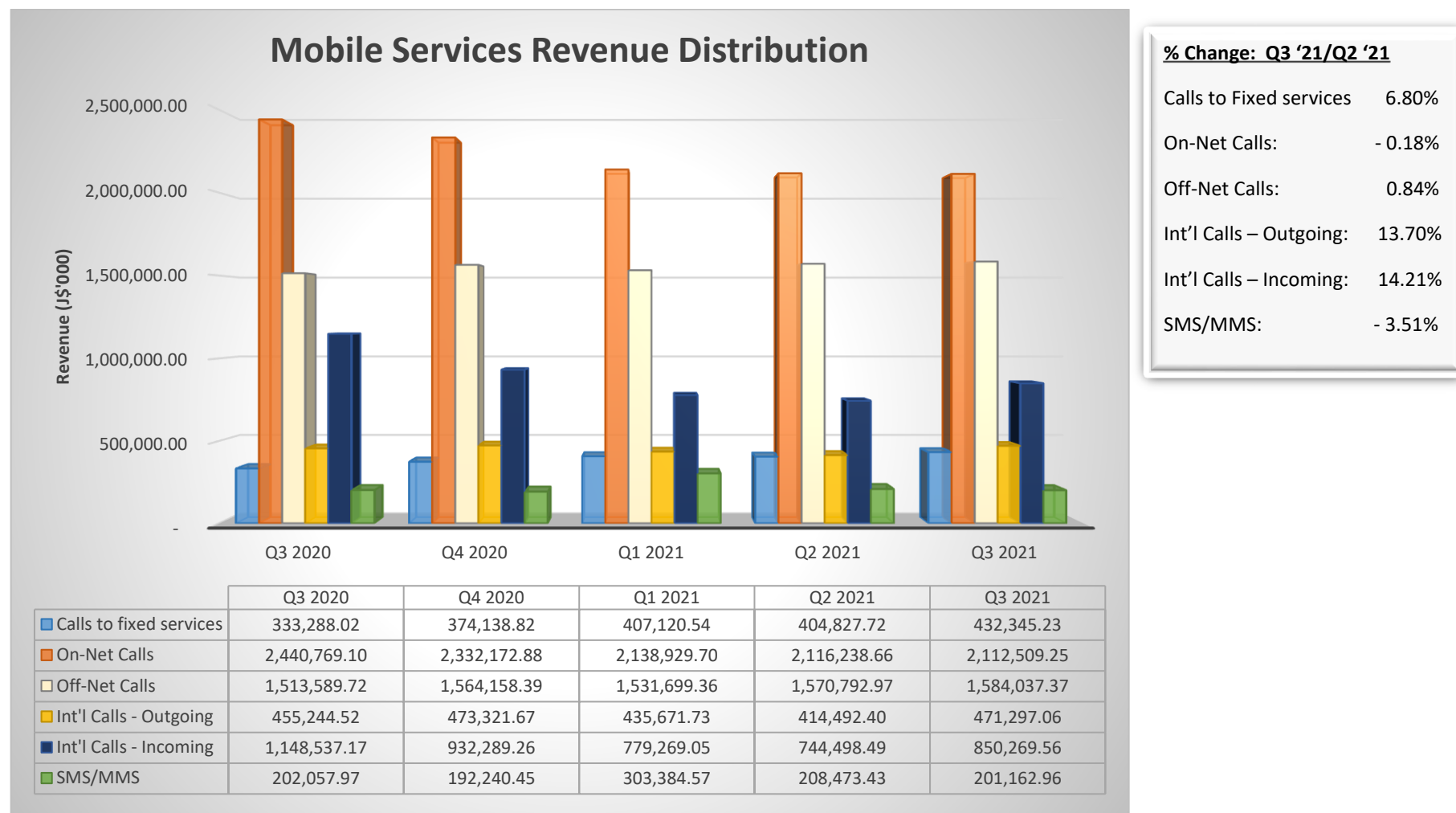
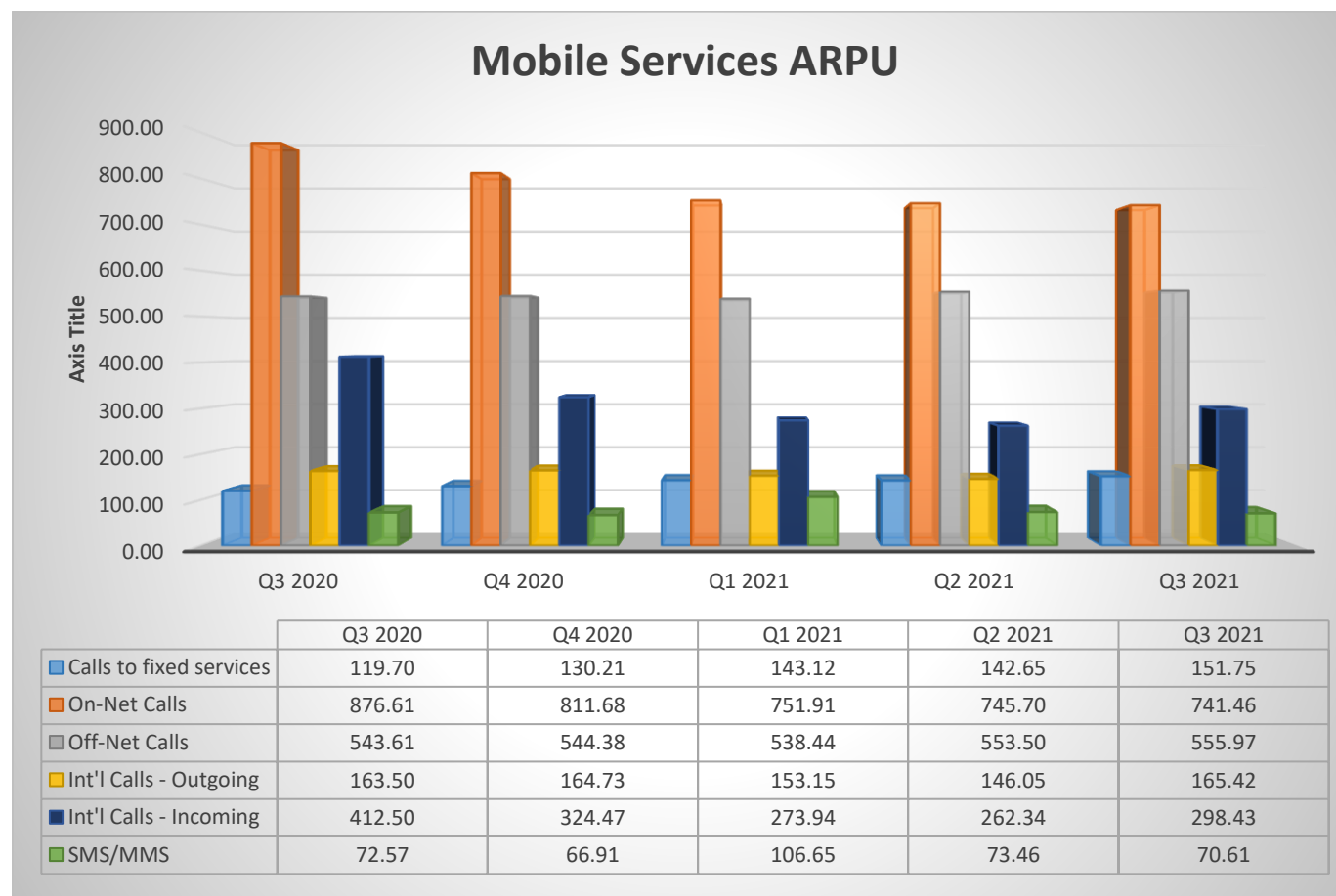


Figure 8: Mobile Services Average Revenue per User (ARPU)

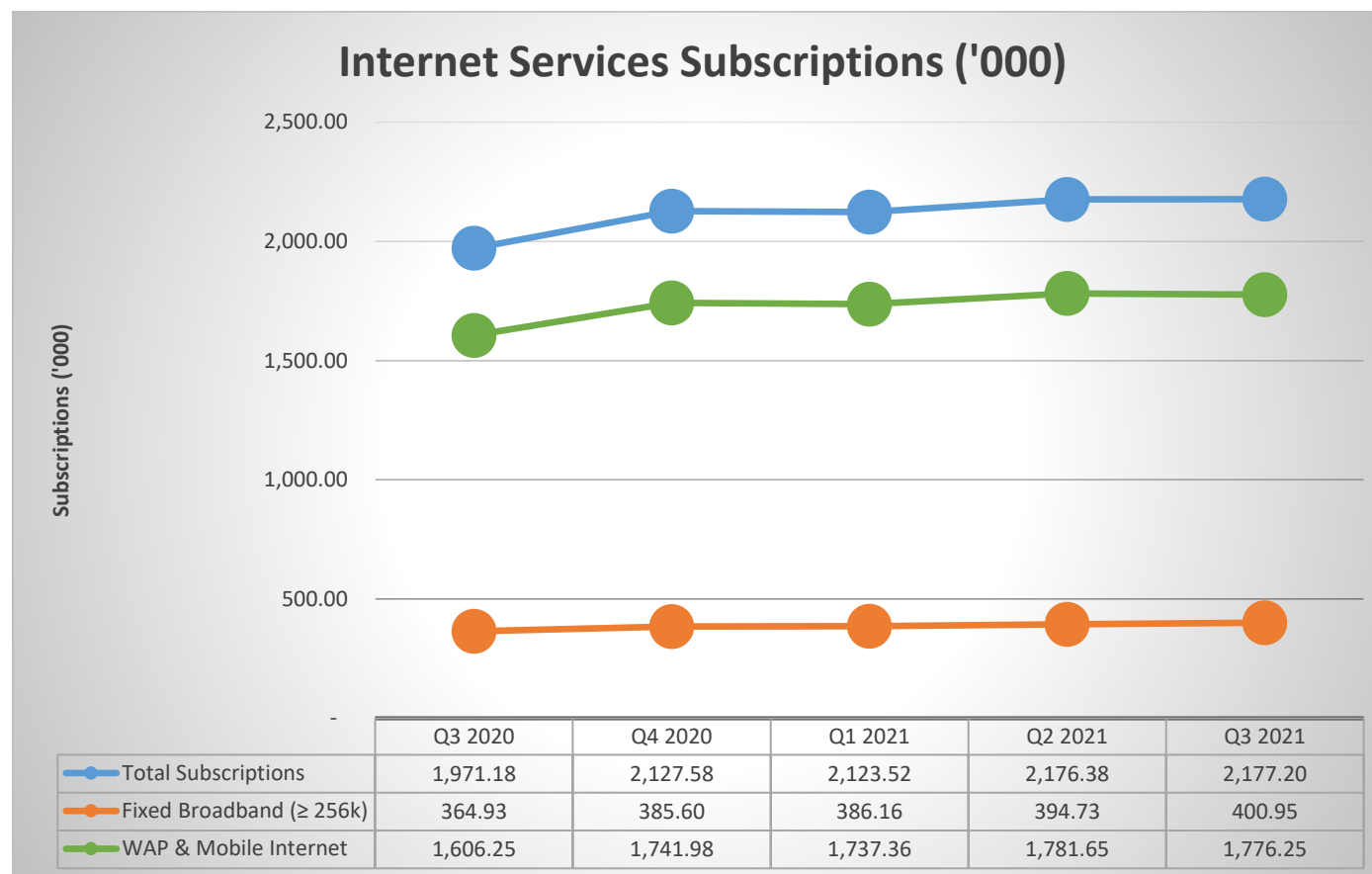


% Change: Q3 '21/Q2 '21

Calls to fixed service	6.38%
On-Net Calls:	- 0.57%
Off-Net Calls:	0.45%
Int'l Calls – Outgoing:	13.26%
Int'l Calls – Incoming:	13.76%
SMS/MMS:	- 3.89%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change: Q3 '21/Q2 '21

Total Subscriptions: 0.04%

Fixed Broadband (≥ 256k): 1.58%

WAP & Mobile Internet: - 0.30%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Fixed Subscription Penetration Rate	15.4%	16.0%	16.2%	16.6%	16.9%
Mobile Subscription Penetration Rate	101.8%	105.1%	104.0%	103.8%	104.2%
Fixed Broadband Subscription Penetration Rate	13.4%	14.1%	14.1%	14.4%	14.7%
Mobile Broadband Subscription Penetration Rate	58.8%	63.7%	63.5%	65.2%	65.0%
Total Broadband Subscription Penetration Rate	72.1%	77.8%	77.7%	79.6%	79.7%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Fixed HHI	4,707	4,666	4,591	4,400	4,384
Mobile HHI	5,141	5,151	5,123	5,077	5,063
Fixed Broadband HHI	3,716	3,718	3,712	3,730	3,733
Mobile Broadband HHI	5,227	5,237	5,182	5,107	5,054

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	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	% Change Q3 '21/Q2 '21	% Change Q3 '21/Q3 '20
Total Subscriptions ('000)	422.04	436.25	443.68	454.49	461.91	1.63	9.45
Fixed to Fixed ('000 minutes)	51,403.49	52,264.20	50,032.93	45,608.55	42,782.41	-6.20	-16.77
Fixed to Mobile Calls ('000 minutes)	58,182.71	53,939.88	63,881.47	63,948.41	66,306.82	3.69	13.96
Total International Calls ('000 minutes)	17,682.48	18,911.52	16,269.09	15,681.41	16,614.42	5.95	-6.04
Outgoing International Calls ('000 minutes)	3,817.86	3,777.63	3,614.70	3,510.10	3,513.17	0.09	-7.98
Incoming International Calls ('000 minutes)	13,864.61	15,133.90	12,654.39	12,171.32	13,101.25	7.64	-5.51
Total Revenue (J\$' million)	2,354.01	2,412.93	2,369.75	2,533.00	2,520.17	-0.51	7.06

Mobile Market	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	% Change Q3 '21/Q2 '21	% Change Q3 '21/Q3 '20
Total Subscriptions ('000)	2,784.31	2,873.26	2,844.68	2,837.94	2,849.12	0.39	2.33
Calls to Fixed Services	92,220.24	95,710.92	93,421.62	94,891.53	95,721.72	0.87	3.80
On-Net Calls ('000 minutes)	1,052,416.13	1,067,693.10	1,044,939.19	1,048,294.28	1,038,690.98	-0.92	-1.30
Off-Net Calls ('000 minutes)	965,960.24	1,027,762.01	1,021,511.54	1,025,583.23	1,010,028.10	-1.52	4.56
International calls	184,559.38	170,697.51	161,819.76	152,004.69	139,932.25	-7.94	-24.18
Outgoing International ('000 minutes)	134,881.66	125,782.13	117,423.96	110,004.10	100,982.19	-8.20	-25.13
Incoming International ('000 minutes)	49,677.72	44,915.38	44,395.79	42,000.59	38,950.07	-7.26	-21.59
SMS/MMS traffic ('000 # of messages)	59,461.80	57,709.54	53,062.97	51,969.52	53,785.73	3.49	-9.55
Total Revenue (J\$ ' million)	12,958.42	12,819.32	12,597.10	12,985.40	13,461.67	3.67	3.88

Internet Market	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	% Change Q3 '21/Q2 '21	% Change Q3 '21/Q3 '20
Total Subscriptions ('000)	1,971.18	2,127.58	2,123.52	2,176.38	2,177.20	0.04	10.45
Fixed Broadband (≥256K)	364.93	385.60	386.16	394.73	400.95	1.58	9.87
WAP & Mobile Internet	1,606.25	1,741.98	1,737.36	1,781.65	1,776.25	-0.30	10.58
Total Revenue (J\$' million)	9,603.67	9,983.15	10,211.36	10,610.97	10,927.41	2.98	13.78

Penetration Rate	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Fixed Subscription Penetration Rate	15.4%	16.0%	16.2%	16.6%	16.9%
Mobile Subscription Penetration Rate	101.8%	105.1%	104.0%	103.8%	104.2%
Fixed Broadband Subscription Penetration Rate	13.4%	14.1%	14.1%	14.4%	14.7%
Mobile Broadband Subscription Penetration Rate	58.8%	63.7%	63.5%	65.2%	65.0%
Total Broadband Subscription Penetration Rate	72.1%	77.8%	77.7%	79.6%	79.7%

Herfindahl-Hirschman Index (HHI)	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Fixed HHI	4,707	4,666	4,591	4,400	4,384
Mobile HHI	5,141	5,151	5,123	5,077	5,063
Fixed Broadband HHI	3,716	3,718	3,712	3,730	3,733
Mobile Broadband HHI	5,227	5,237	5,182	5,107	5,054