
Office of Utilities Regulation

Telecommunications Market Information Report October – December 2021



Telecommunications Market Information Report: October - December 2021
Document Number 2022/TEL/009/QSR.002
Office of Utilities Regulation
2022 June 07

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Fixed Market Data

Figure 1: Fixed Services Subscriptions

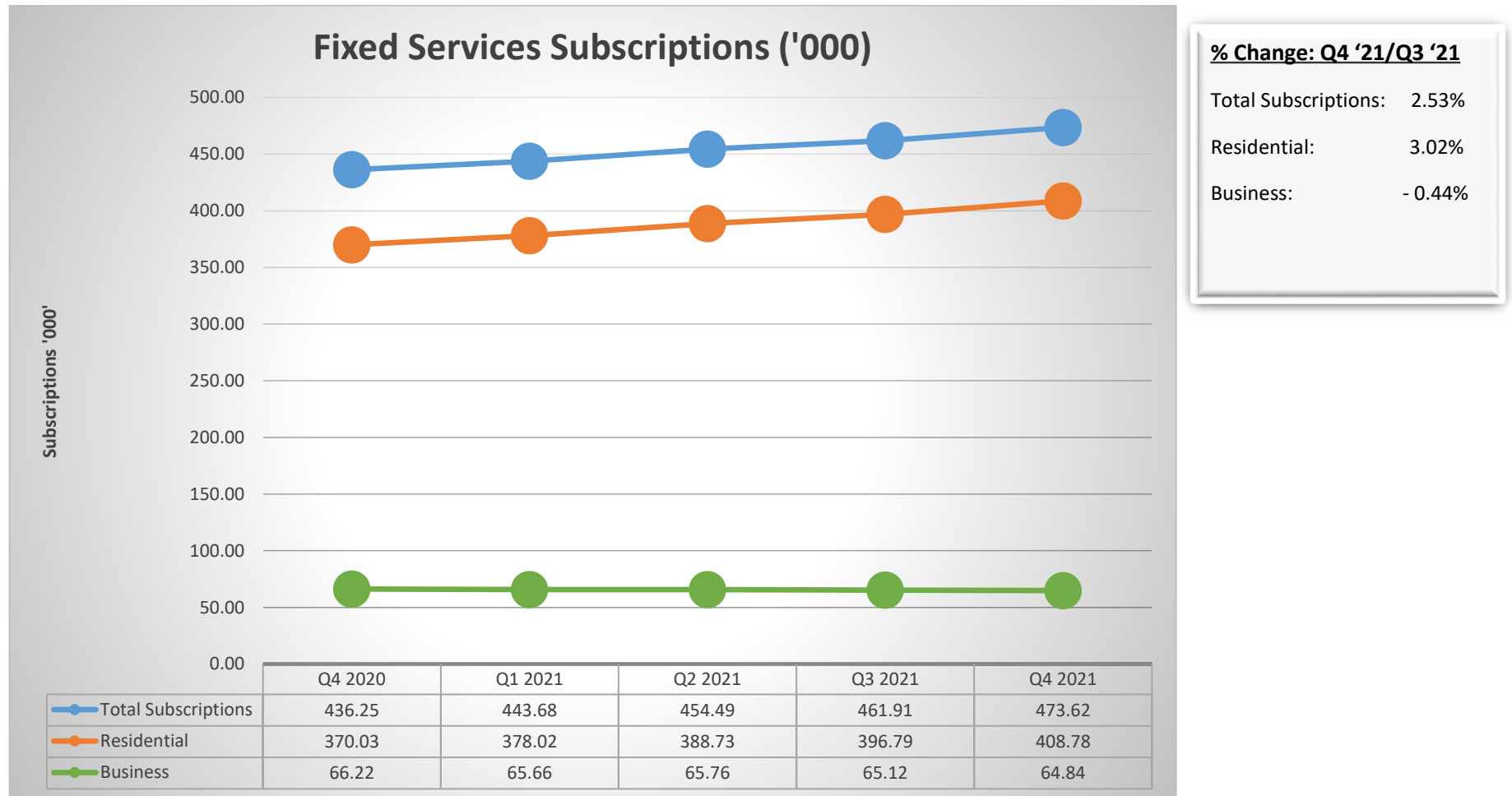


Figure 2: Fixed Call Minutes

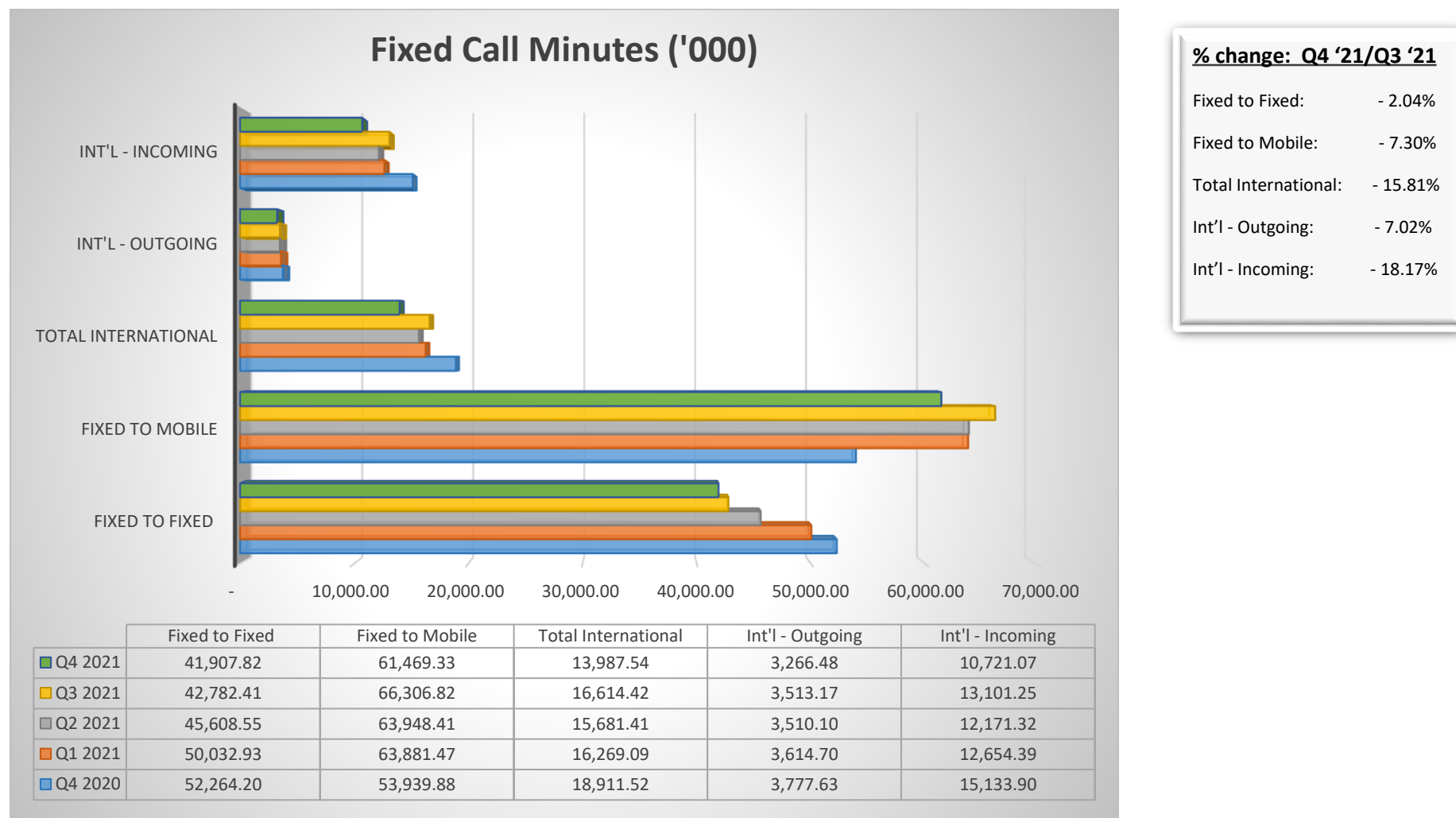
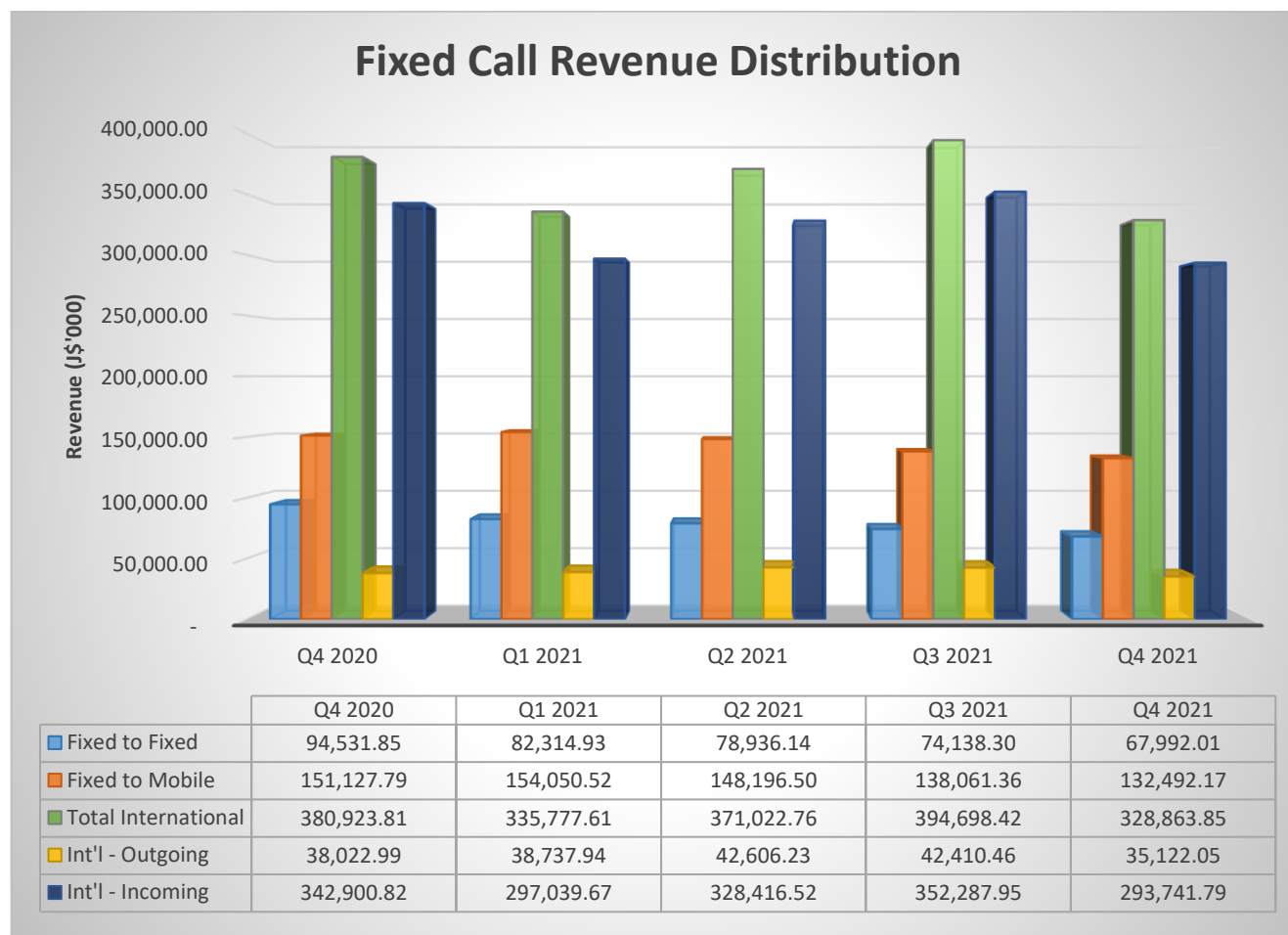


Figure 3: Fixed Call Revenue Distribution



% change Q4 '21/Q3 '21

Fixed to Fixed: - 8.29%

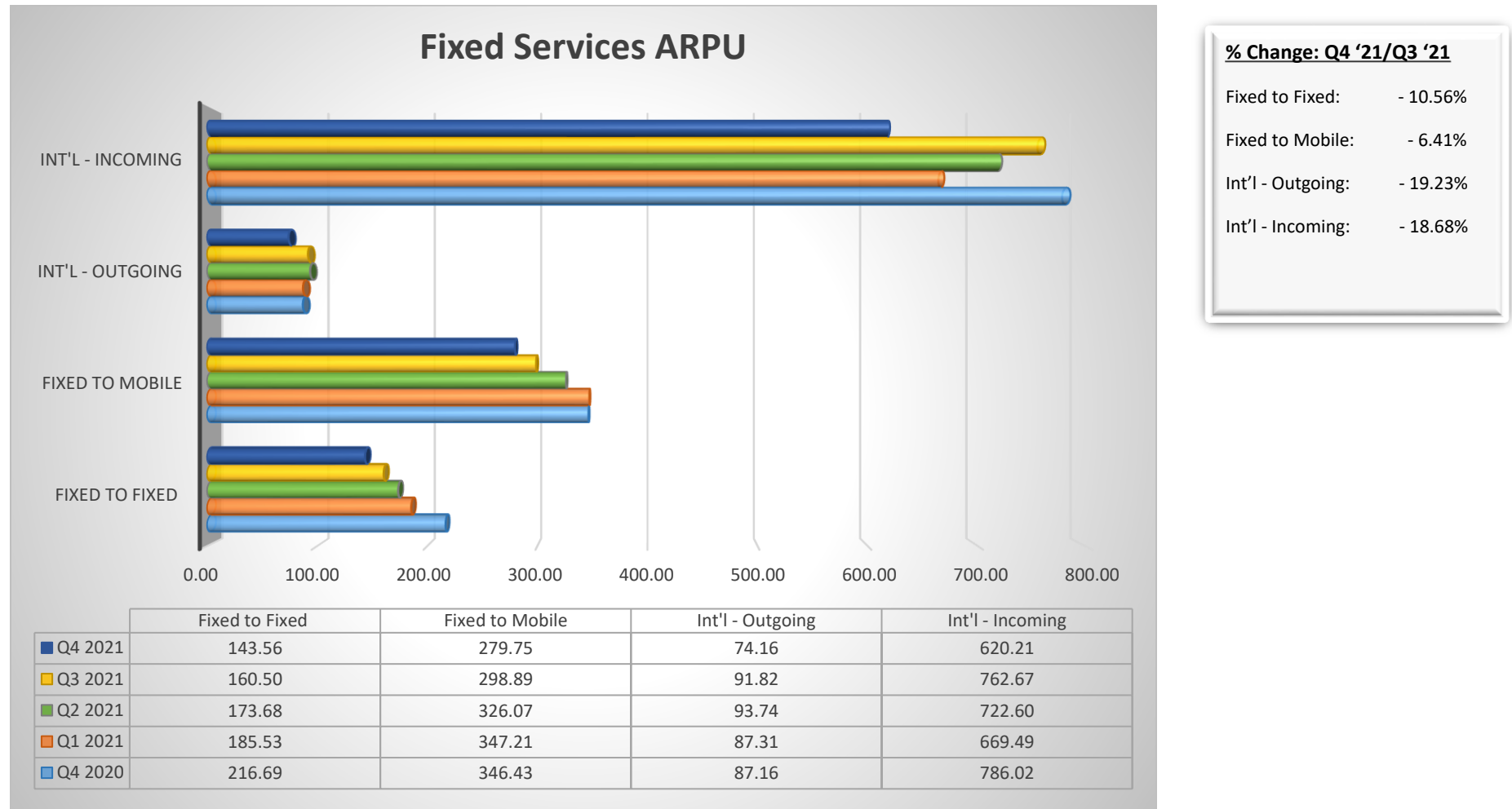
Fixed to Mobile: - 4.03%

Total International: - 16.68%

Int'l - Outgoing: - 17.19%

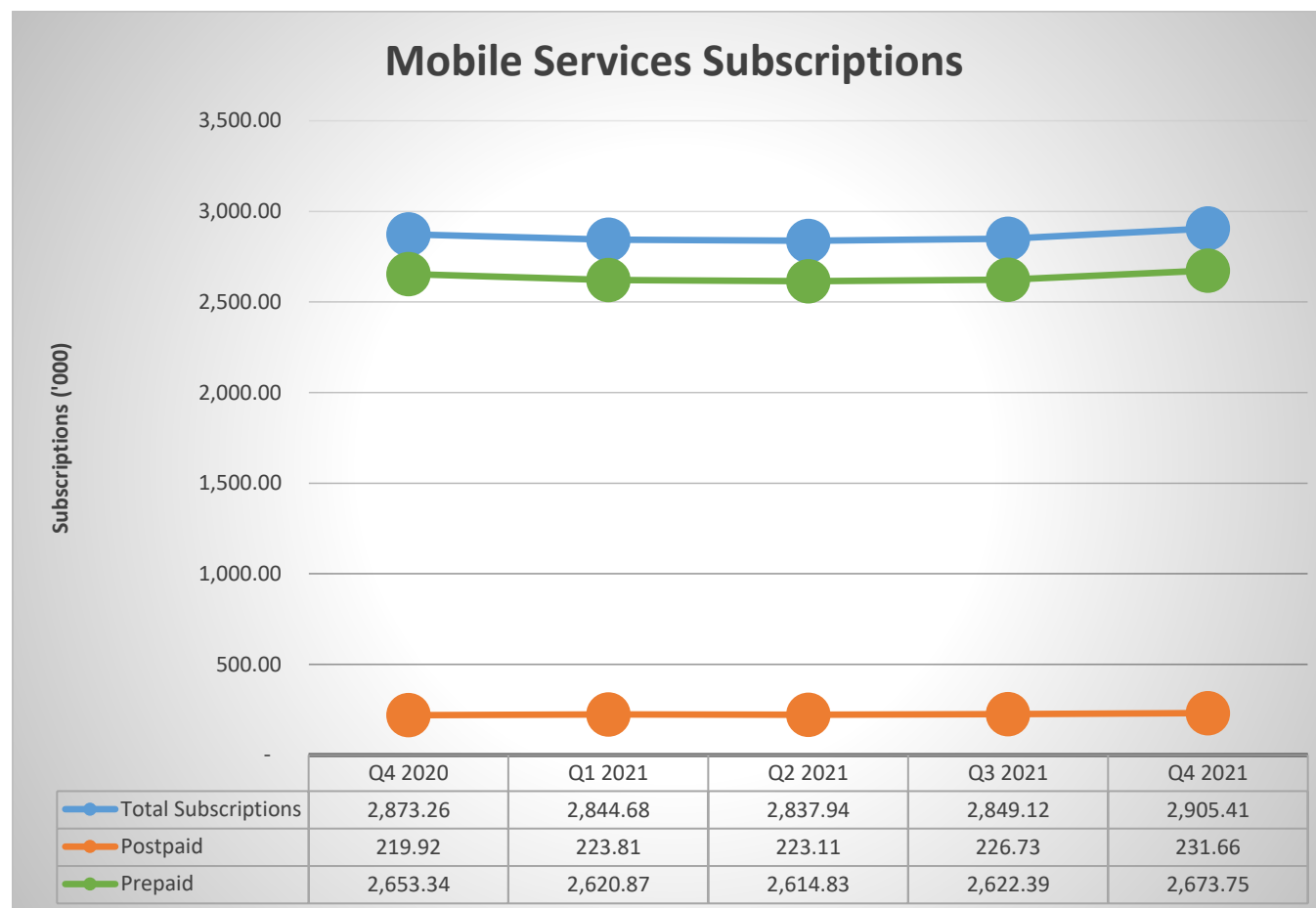
Int'l - Incoming: - 16.62%

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



Mobile Market Data

Figure 5: Mobile Services Subscriptions



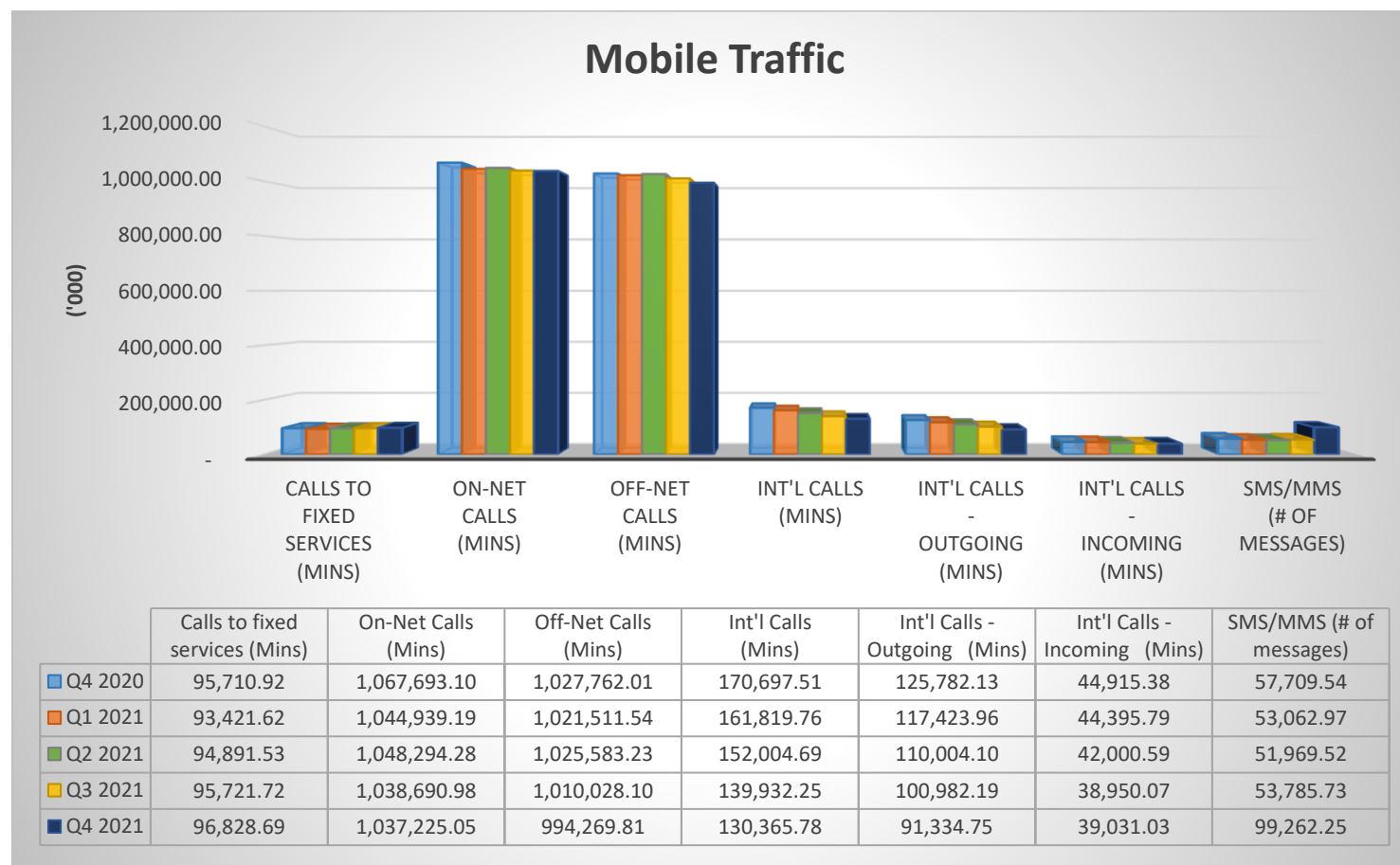
% Change: Q4 '21/Q3 '21

Total Subscriptions: 1.98%

Postpaid: 2.17%

Prepaid: 1.96%

Figure 6: Mobile Traffic*

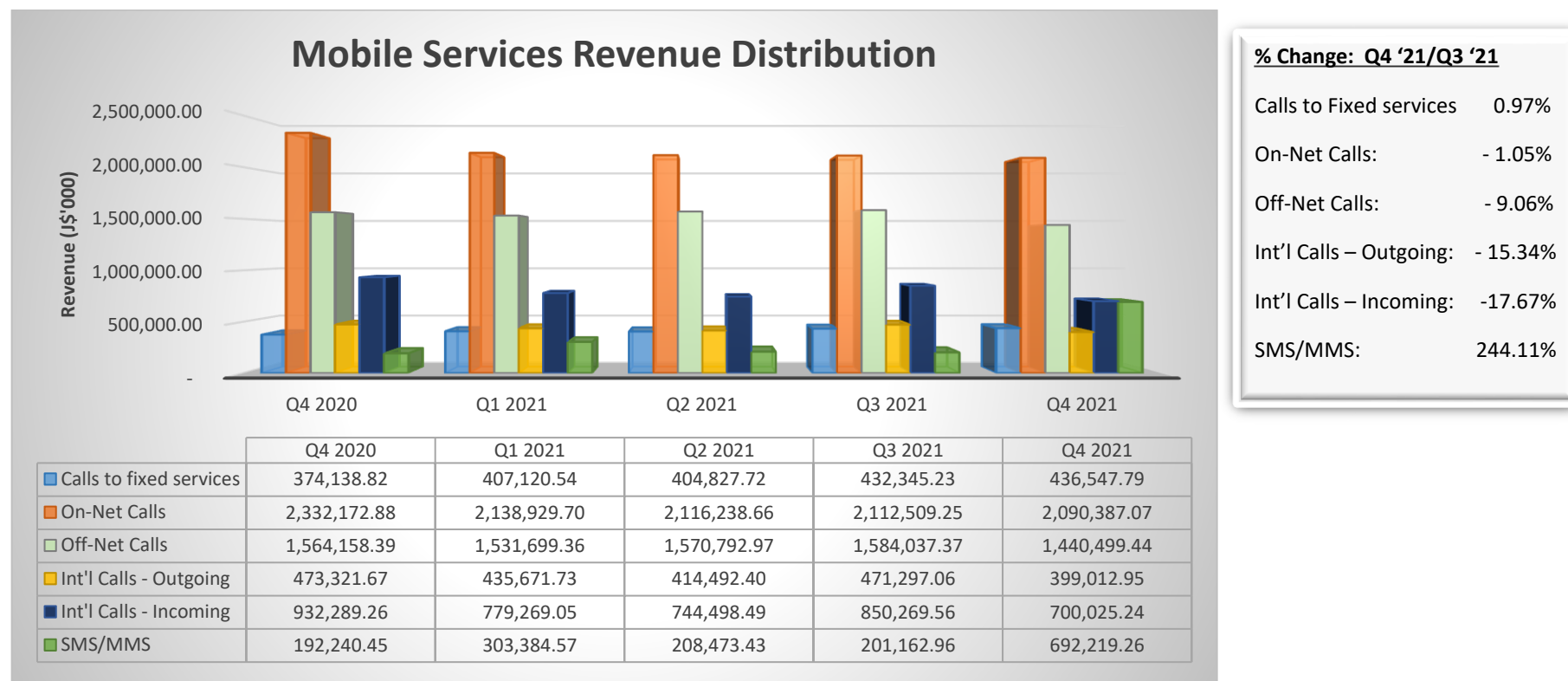


% Change: Q4 '21/Q3 '21

Calls to fixed service s:	1.16%
On-Net Calls:	- 0.14%
Off-Net Calls:	-1.56%
Int'l Calls:	- 6.84%
Int'l Calls – Outgoing:	-9.55%
Int'l Calls – Incoming:	0.21%
SMS/MMS:	84.55%

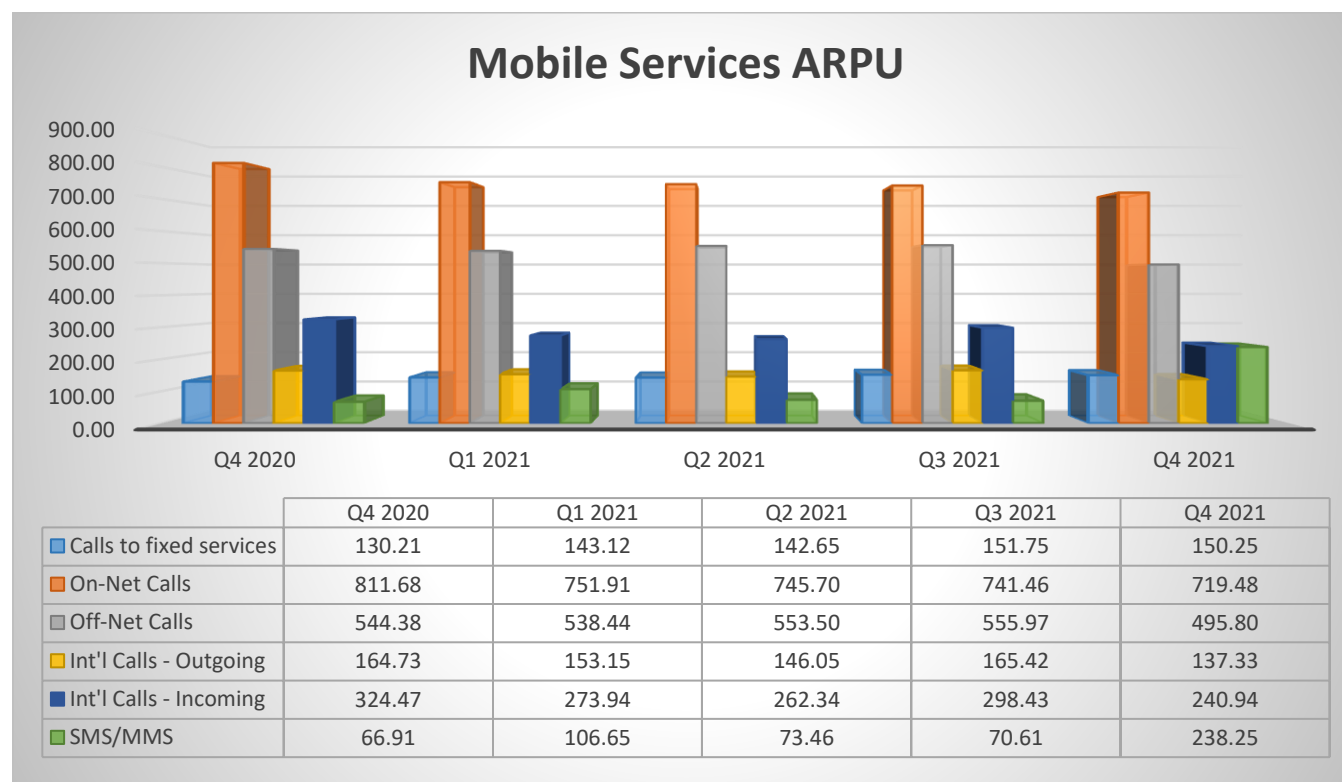
* The significant increase recorded for “SMS/MMS” traffic in the Q4 2021 quarter was due to an adjustment that was done by one operator to figures previously reported for Q3 2021.

Figure 7: Mobile Services Revenue Distribution*



* The significant increase recorded for revenues arising from “SMS/MMS” traffic in the Q4 2021 quarter was due to an adjustment that was done by one operator to figures previously reported for Q3 2021.

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



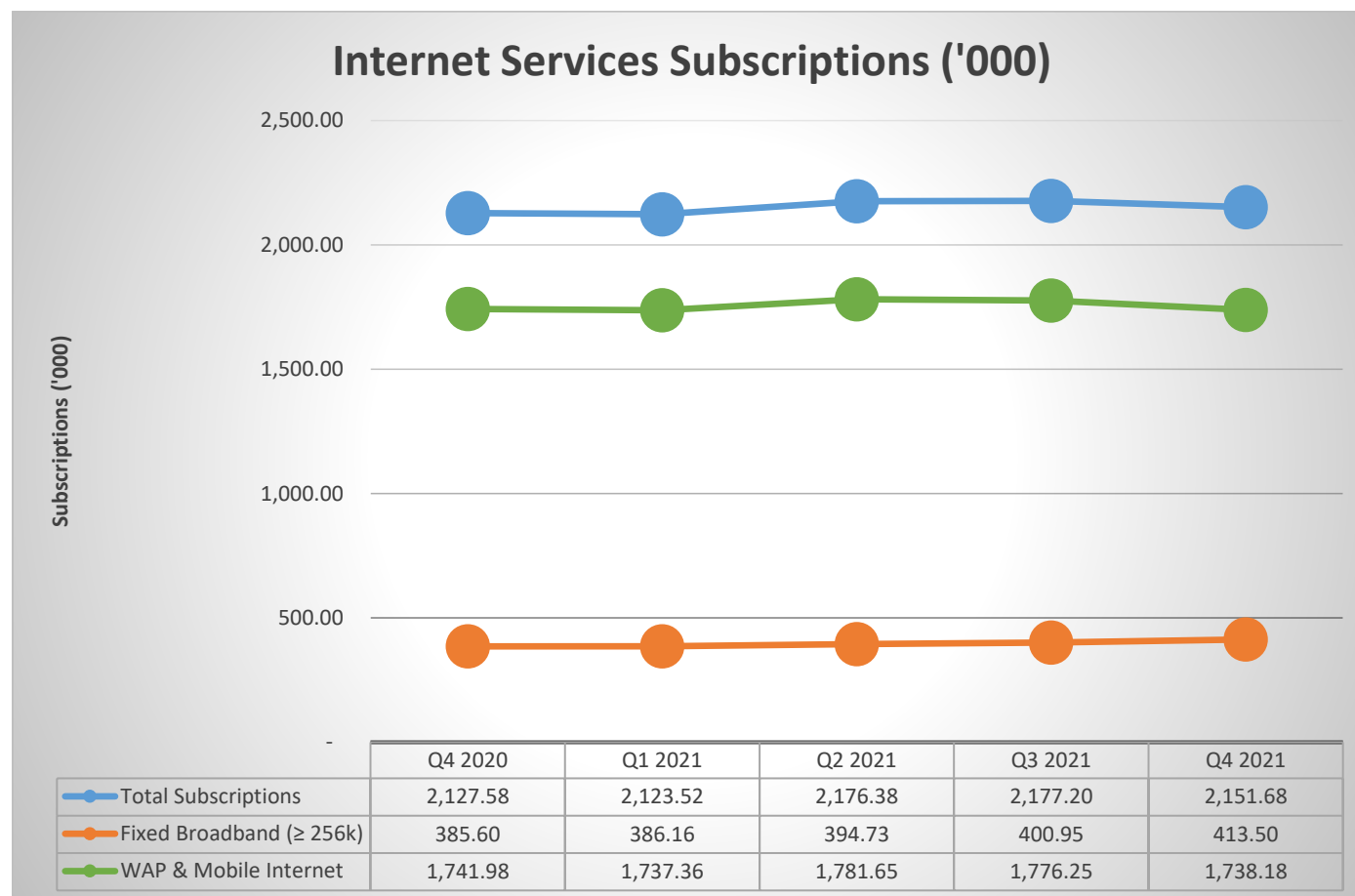
% Change: Q4 '21/Q3 '21

Calls to fixed service	- 0.98%
On-Net Calls:	- 2.96%
Off-Net Calls:	-10.82%
Int'l Calls – Outgoing:	-16.98%
Int'l Calls – Incoming:	-19.27%
SMS/MMS:	237.44%

* The significant increase recorded for ARPU arising from “SMS/MMS” traffic in the Q4 2021 quarter was due to an adjustment that was done by one operator to figures previously reported for Q3 2021.

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change: Q4 '21/Q3 '21

Total Subscriptions: - 1.17%

Fixed Broadband (≥ 256k): 3.13%

WAP & Mobile Internet: -2.14%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Fixed Subscription Penetration Rate	16.0%	16.2%	16.6%	16.9%	17.3%
Mobile Subscription Penetration Rate	105.1%	104.0%	103.8%	104.2%	106.3%
Fixed Broadband Subscription Penetration Rate	14.1%	14.1%	14.4%	14.7%	15.1%
Mobile Broadband Subscription Penetration Rate	63.7%	63.5%	65.2%	65.0%	63.6%
Total Broadband Subscription Penetration Rate	77.8%	77.7%	79.6%	79.7%	78.7%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Fixed HHI	4,666	4,591	4,400	4,384	4,398
Mobile HHI	5,151	5,123	5,077	5,063	5,061
Fixed Broadband HHI	3,718	3,712	3,730	3,733	3,735
Mobile Broadband HHI	5,237	5,182	5,107	5,054	5,027

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 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	% Change Q4 '21/Q3 '21	% Change Q4 '21/Q4 '20
Total Subscriptions ('000)	436.25	443.68	454.49	461.91	473.62	2.53	8.57
Fixed to Fixed ('000 minutes)	52,264.20	50,032.93	45,608.55	42,782.41	41,907.82	-2.04	-19.82
Fixed to Mobile Calls ('000 minutes)	53,939.88	63,881.47	63,948.41	66,306.82	61,469.33	-7.30	13.96
Total International Calls ('000 minutes)	18,911.52	16,269.09	15,681.41	16,614.42	13,987.54	-15.81	-26.04
Outgoing International Calls ('000 minutes)	3,777.63	3,614.70	3,510.10	3,513.17	3,266.48	-7.02	-13.53
Incoming International Calls ('000 minutes)	15,133.90	12,654.39	12,171.32	13,101.25	10,721.07	-18.17	-29.16
Total Revenue (J\$' million)	2,412.93	2,369.75	2,533.00	2,520.17	2,629.05	4.32	8.96

Mobile Market	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	% Change Q4 '21/Q3 '21	% Change Q4 '21/Q4 '20
Total Subscriptions ('000)	2,873.26	2,844.68	2,837.94	2,849.12	2,905.41	1.98	1.12
Calls to Fixed Services	95,710.92	93,421.62	94,891.53	95,721.72	96,828.69	1.16	1.17
On-Net Calls ('000 minutes)	1,067,693.10	1,044,939.19	1,048,294.28	1,038,690.98	1,037,225.05	-0.14	-2.85
Off-Net Calls ('000 minutes)	1,027,762.01	1,021,511.54	1,025,583.23	1,010,028.10	994,269.81	-1.56	-3.26
International calls	170,697.51	161,819.76	152,004.69	139,932.25	130,365.78	-6.84	-23.63
Outgoing International ('000 minutes)	125,782.13	117,423.96	110,004.10	100,982.19	91,334.75	-9.55	-27.39
Incoming International ('000 minutes)	44,915.38	44,395.79	42,000.59	38,950.07	39,031.03	0.21	-13.10
SMS/MMS traffic ('000 # of messages)	57,709.54	53,062.97	51,969.52	53,785.73	99,262.25	84.55	72.00
Total Revenue (J\$ ' million)	12,819.32	12,597.10	12,985.40	13,461.67	14,419.28	7.11	12.48

Internet Market	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	% Change Q4 '21/Q3 '21	% Change Q4 '21/Q4 '20
Total Subscriptions ('000)	2,127.58	2,123.52	2,176.38	2,177.20	2,151.68	-1.17	1.13
Fixed Broadband (≥256K)	385.60	386.16	394.73	400.95	413.50	3.13	7.23
WAP & Mobile Internet	1,741.98	1,737.36	1,781.65	1,776.25	1,738.18	-2.14	-0.22
Total Revenue (J\$' million)	9,983.15	10,211.36	10,610.97	10,927.41	12,104.34	10.77	21.25

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