
Office of Utilities Regulation

Telecommunications Market Information Report January – March 2022



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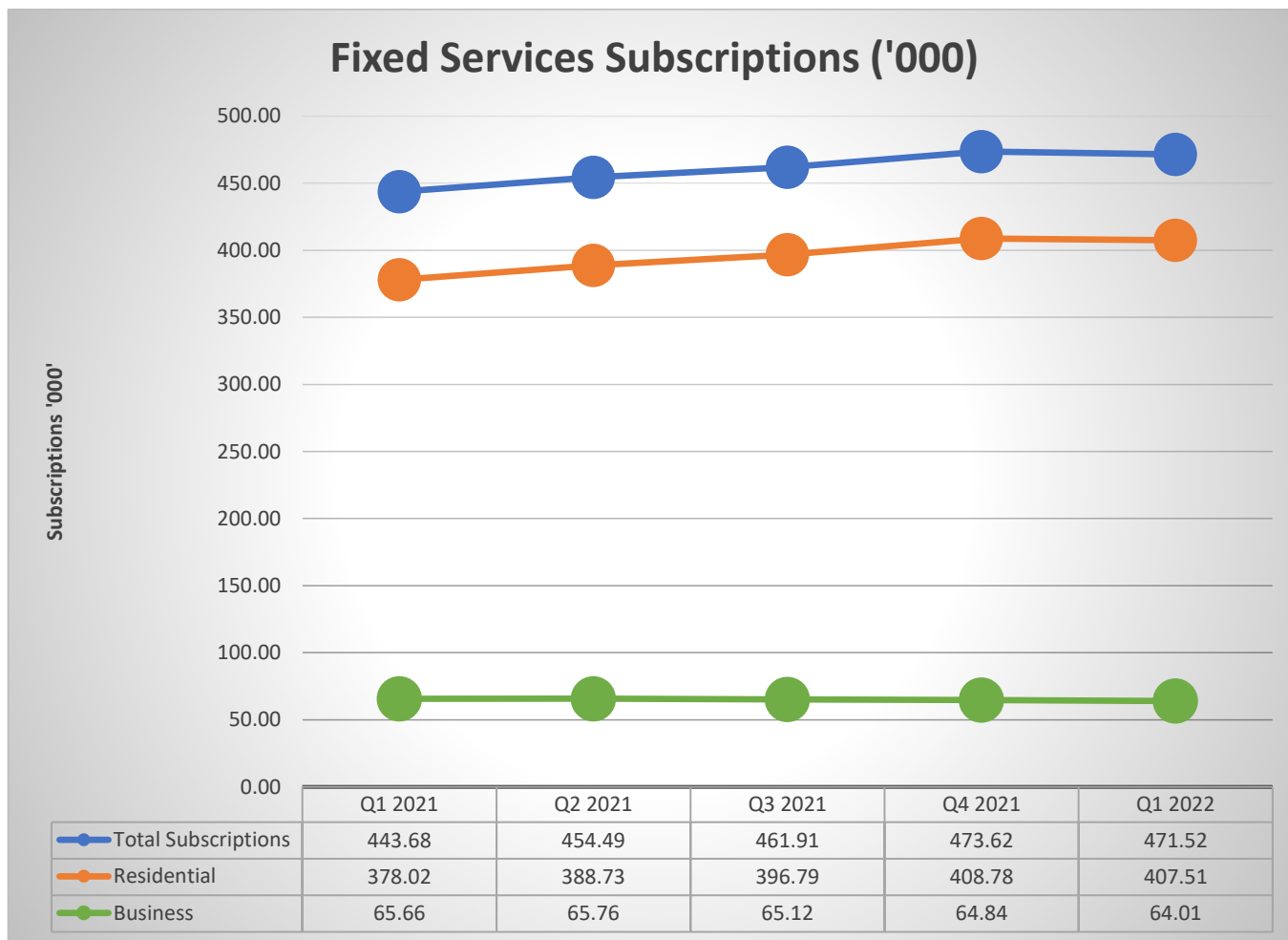
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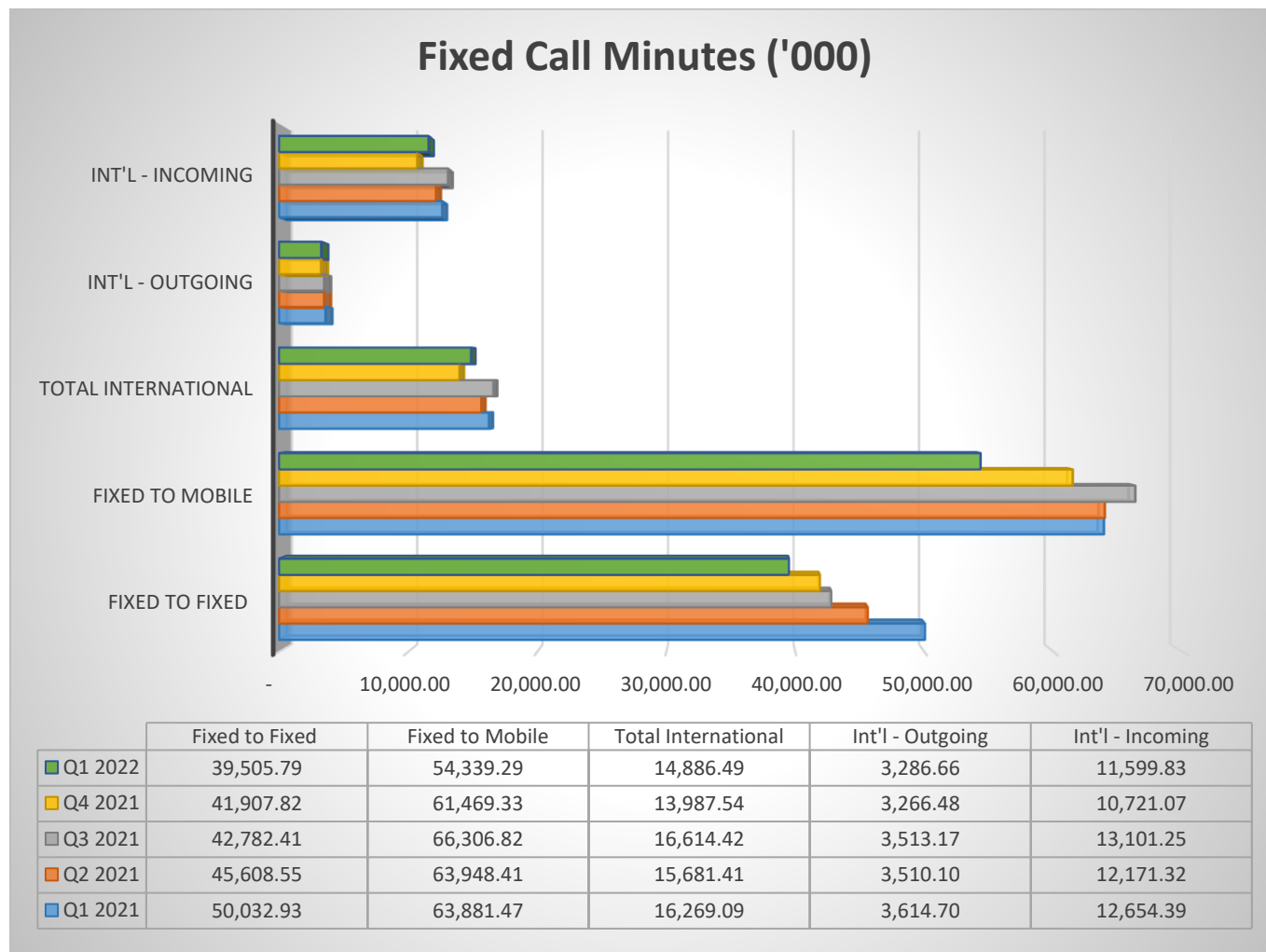
Fixed Market Data

Figure 1: Fixed Services Subscriptions



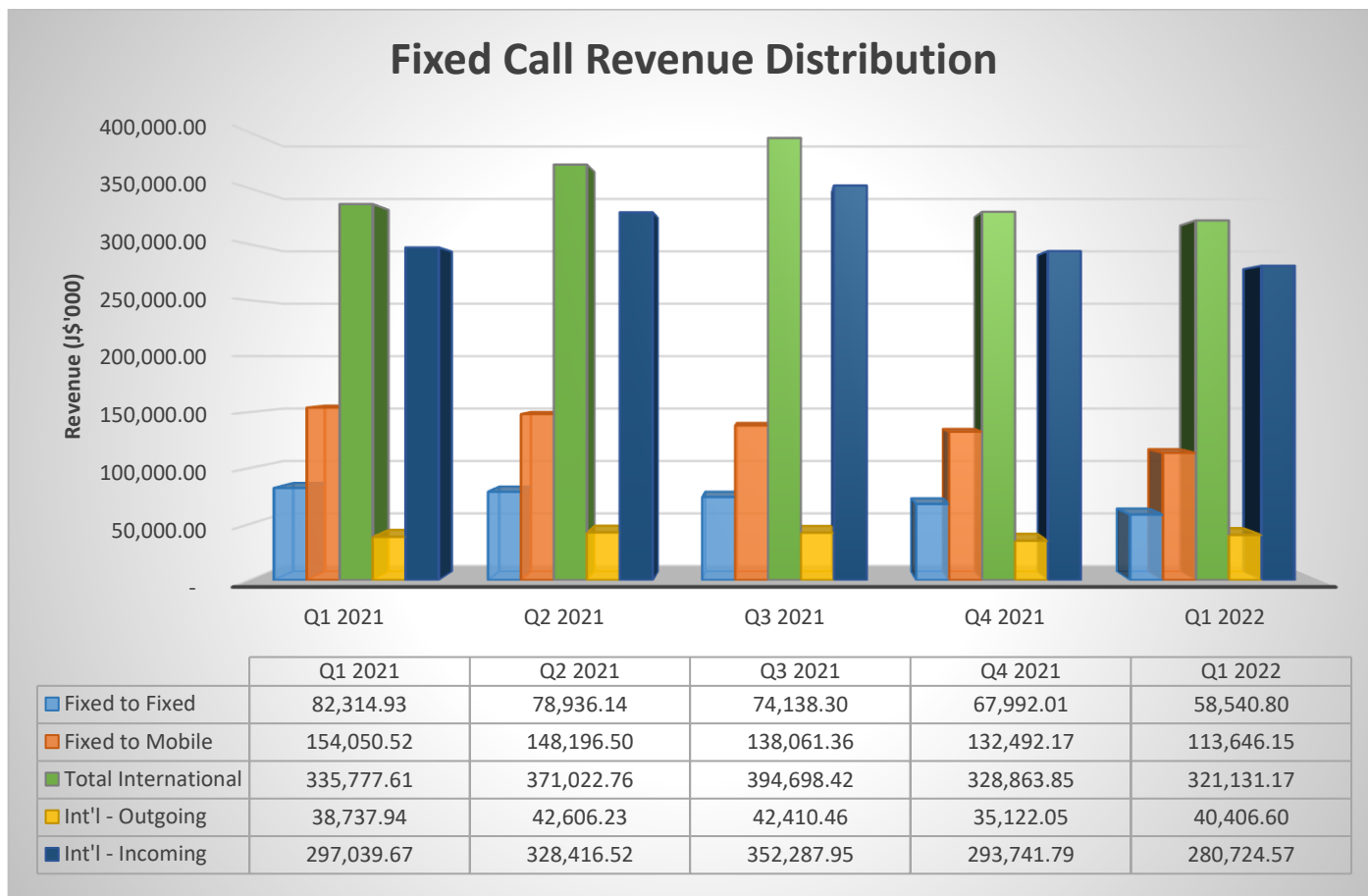
<u>% Change: Q1 '22/Q4 '21</u>	
Total Subscriptions:	- 0.44%
Residential:	- 0.31%
Business:	- 1.28%

Figure 2: Fixed Call Minutes



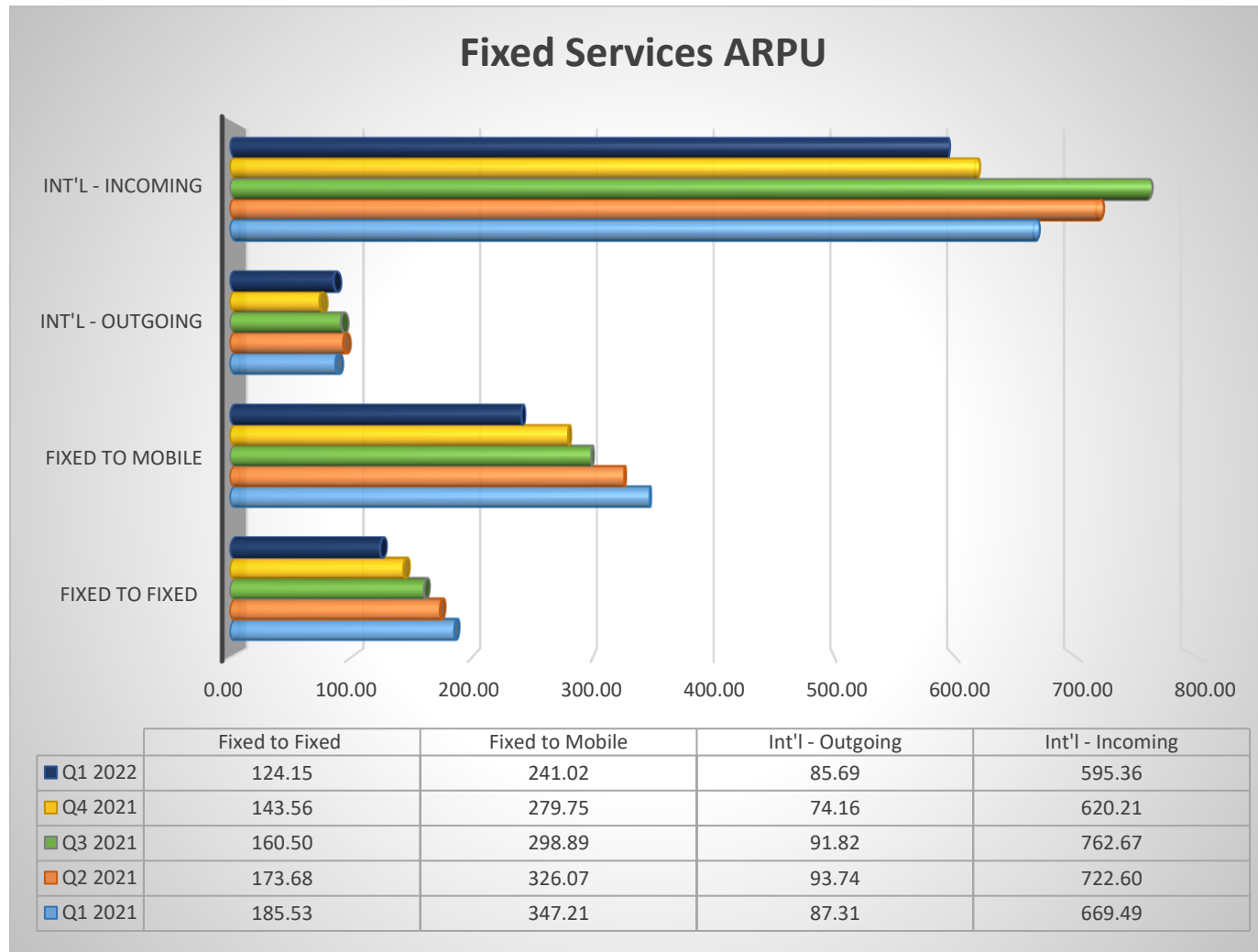
% change: Q1 '22/Q4 '21	
Fixed to Fixed:	- 5.73%
Fixed to Mobile:	- 11.60%
Total International:	6.43%
Int'l - Outgoing:	0.62%
Int'l - Incoming:	8.20%

Figure 3: Fixed Call Revenue Distribution



<u>% change Q1 '22/Q4 '21</u>	
Fixed to Fixed:	- 13.90%
Fixed to Mobile:	- 14.22%
Total International:	- 2.35%
Int'l - Outgoing:	15.05%
Int'l - Incoming:	- 4.43%

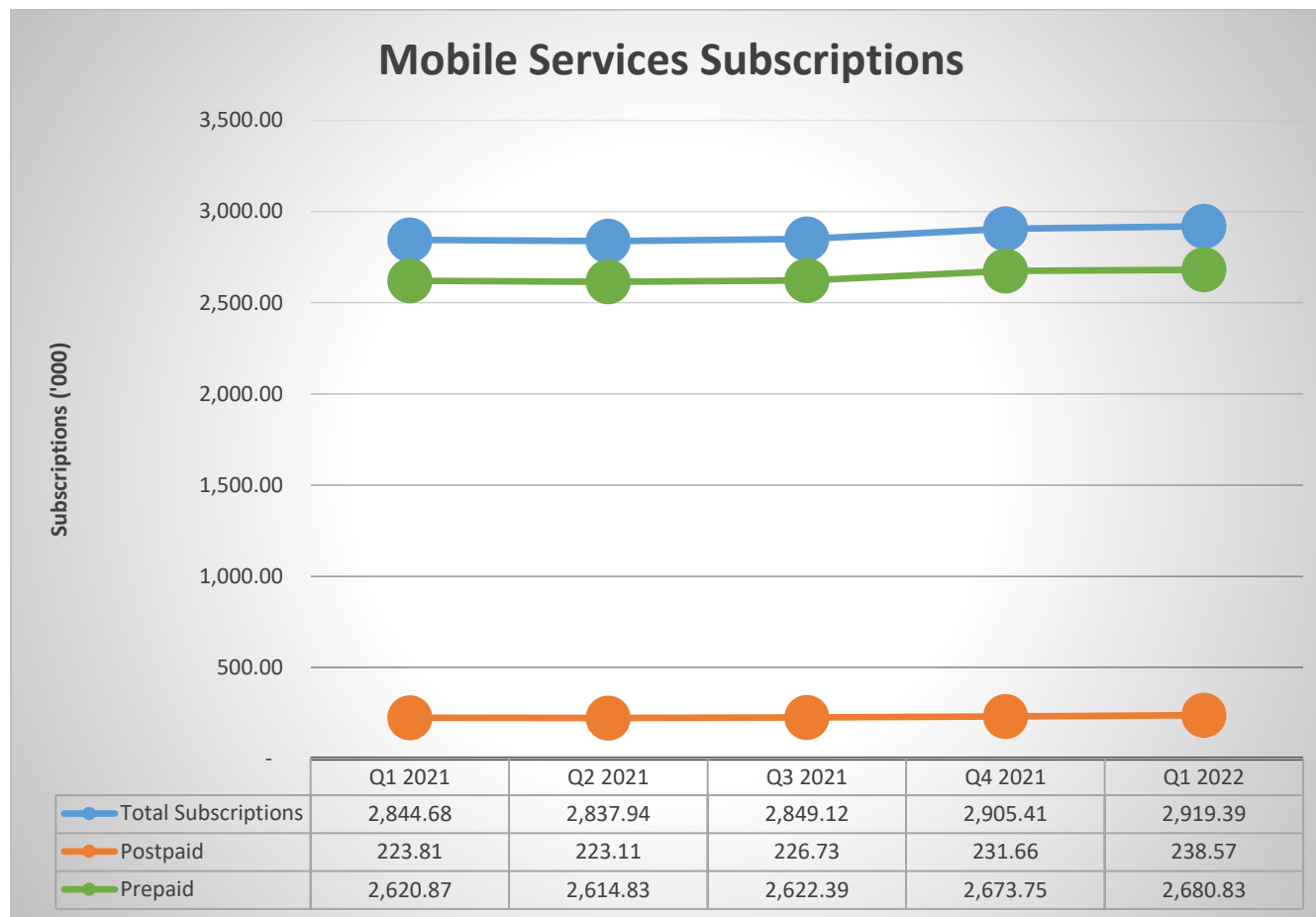
Figure 4: Fixed Services Average Revenue per User (ARPU)



<u>% Change: Q1 '22/Q4 '21</u>	
Fixed to Fixed:	- 13.52%
Fixed to Mobile:	- 13.84%
Int'l - Outgoing:	15.56%
Int'l - Incoming:	- 4.01%

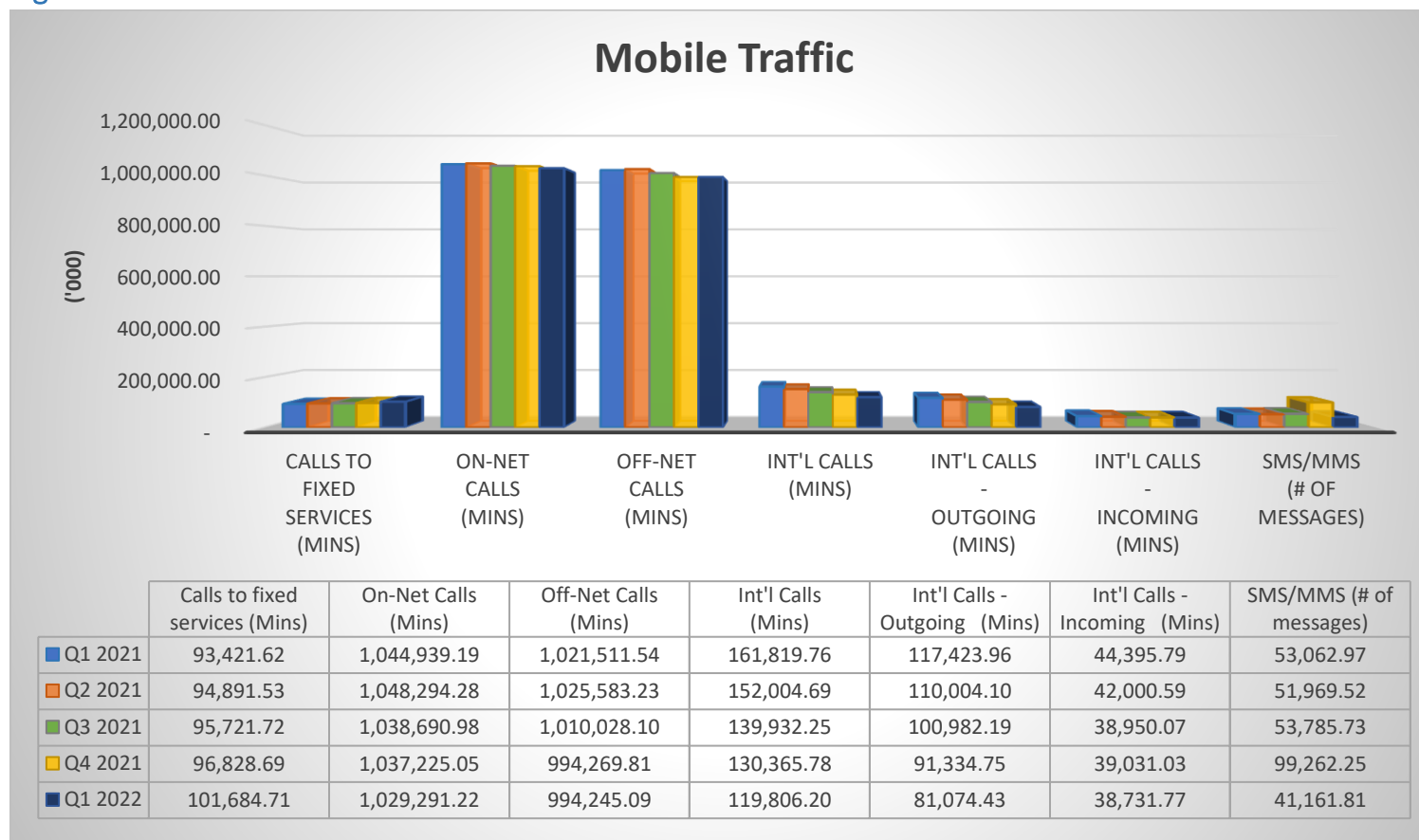
Mobile Market Data

Figure 5: Mobile Services Subscriptions



% Change: Q1 '22/Q4 '21	
Total Subscriptions:	0.48%
Postpaid:	2.98%
Prepaid:	0.26%

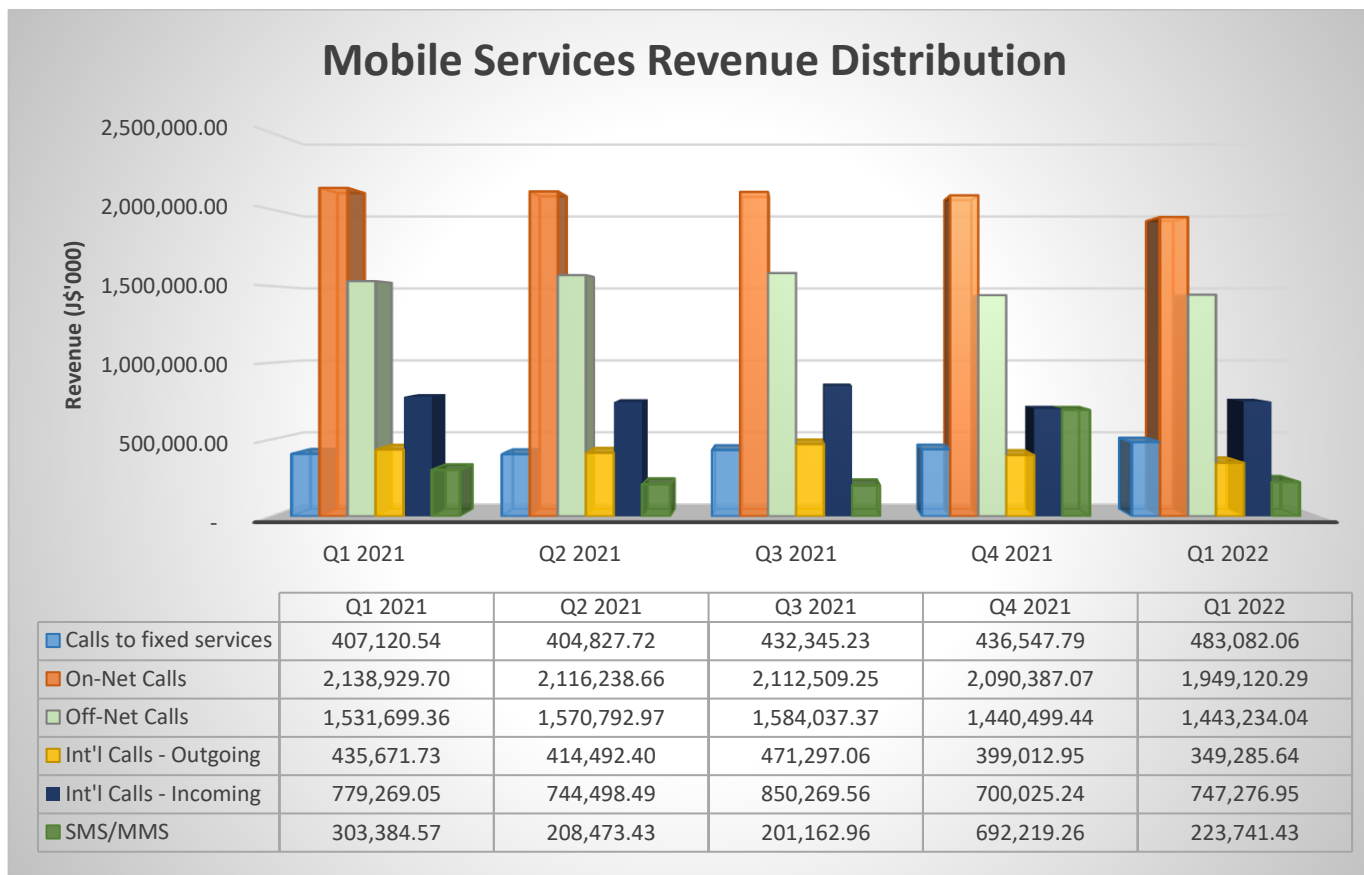
Figure 6: Mobile Traffic*



% Change: Q1 '22/Q4 '21	
Calls to fixed services:	5.02%
On-Net Calls:	- 0.76%
Off-Net Calls:	0%
Int'l Calls:	- 8.10%
Int'l Calls – Outgoing:	- 11.23%
Int'l Calls – Incoming:	- 0.77 %
SMS/MMS:	- 58.53%

* The significant decrease recorded for “SMS/MMS” traffic in the Q1 2022 quarter was impacted by the significant increase in the category as reported in the Q4 2021 quarter and explained to have been due to an adjustment that was done by one operator to figures previously reported.

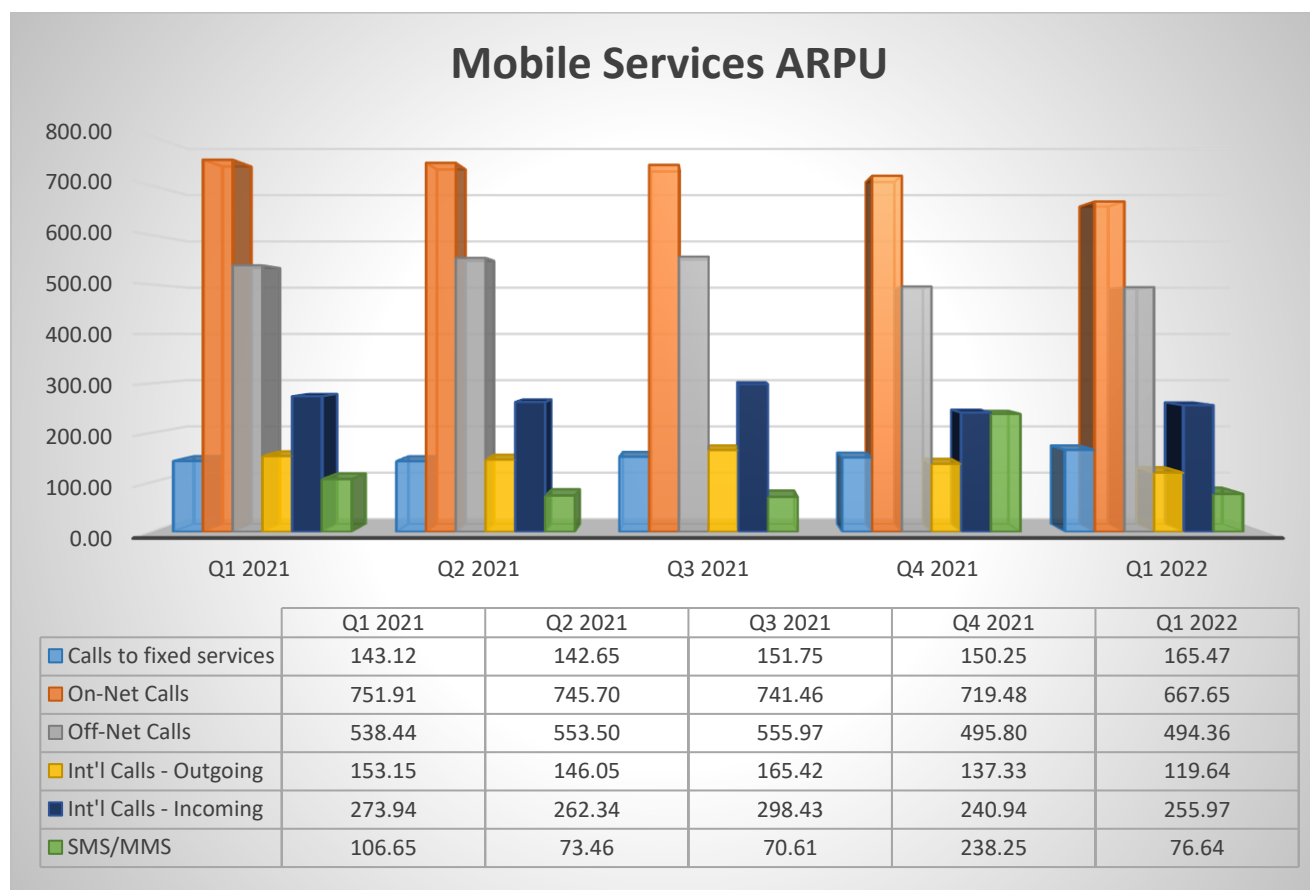
Figure 7: Mobile Services Revenue Distribution*



<u>% Change: Q1 '22/Q4 '21</u>	
Calls to Fixed services	10.66 %
On-Net Calls:	- 6.76%
Off-Net Calls:	0.19%
Int'l Calls – Outgoing:	- 12.46%
Int'l Calls – Incoming:	6.75%
SMS/MMS:	- 67.68%

* The significant decrease recorded for revenues arising from “SMS/MMS” traffic in the Q1 2022 quarter was impacted by the significant increase in the category as reported in the Q4 2021 quarter and explained to have been due to an adjustment that was done by one operator to figures previously reported.

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

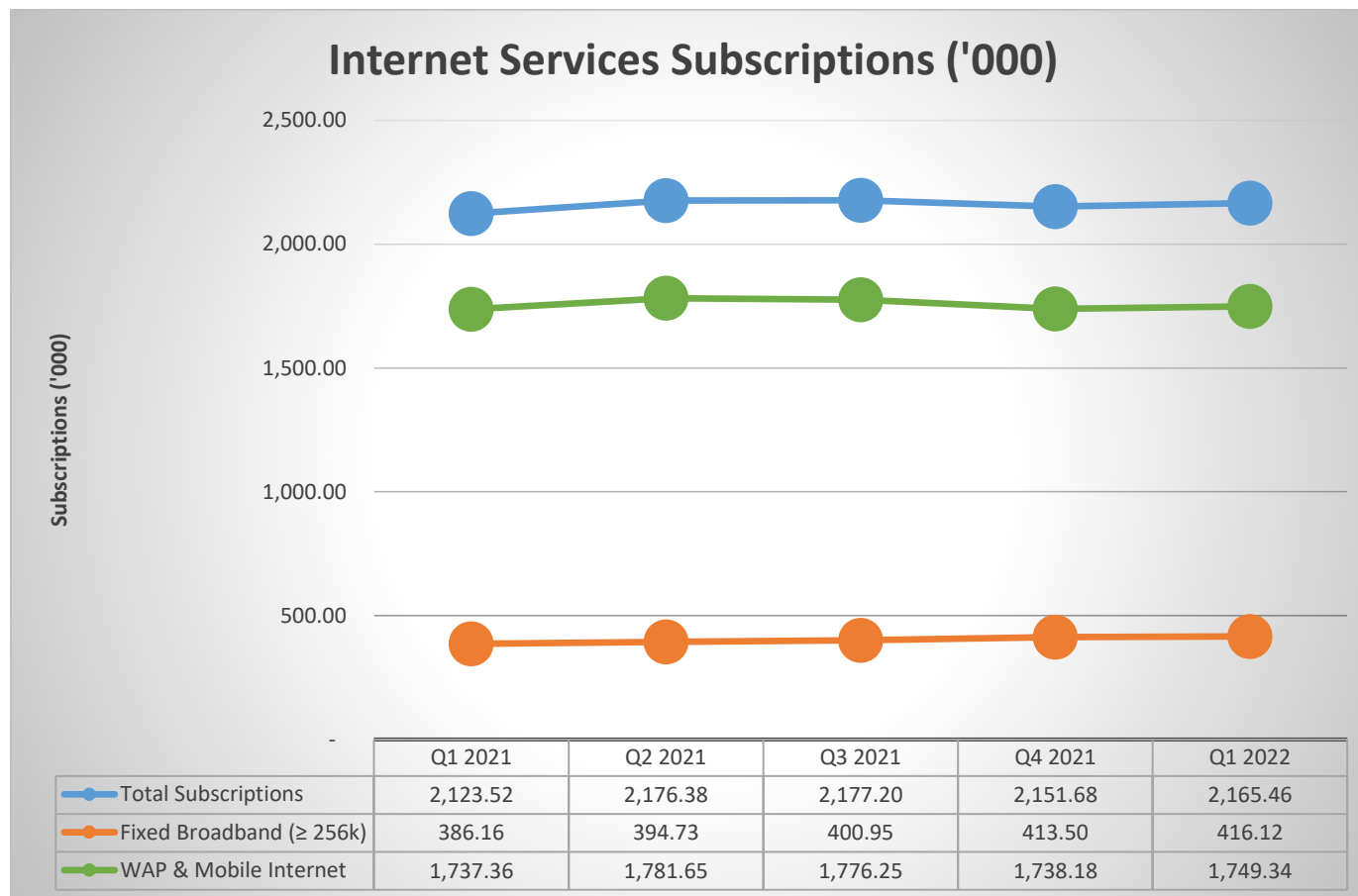


<u>% Change: Q1 '22/Q4 '21</u>	
Calls to fixed service	10.13%
On-Net Calls:	- 7.20%
Off-Net Calls:	- 0.29%
Int'l Calls – Outgoing:	- 12.88%
Int'l Calls – Incoming:	6.24%
SMS/MMS:	- 67.83%

* The significant decrease recorded for ARPU arising from “SMS/MMS” traffic in the Q1 2022 quarter was impacted by the significant increase in the category as reported in the Q4 2021 quarter and explained to have been due to an adjustment that was done by one operator to figures previously reported.

Internet Market Data

Figure 9: Internet Services Subscriptions



<u>% Change: Q1 '22/Q4 '21</u>	
Total Subscriptions:	0.64%
Fixed Broadband (≥ 256k):	0.63%
WAP & Mobile Internet:	0.64%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022
Fixed Subscription Penetration Rate	16.2%	16.6%	16.9%	17.3%	17.3%
Mobile Subscription Penetration Rate	104.0%	103.8%	104.2%	106.3%	106.8%
Fixed Broadband Subscription Penetration Rate	14.1%	14.4%	14.7%	15.1%	15.2%
Mobile Broadband Subscription Penetration Rate	63.5%	65.2%	65.0%	63.6%	64.0%
Total Broadband Subscription Penetration Rate	77.7%	79.6%	79.7%	78.7%	79.2%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022
Fixed HHI	4,591	4,400	4,384	4,398	4,424
Mobile HHI	5,123	5,077	5,063	5,061	5,066
Fixed Broadband HHI	3,712	3,730	3,733	3,735	3,693
Mobile Broadband HHI	5,182	5,107	5,054	5,027	5,031

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	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q4 2021	% Change Q1 '22/Q4 '21	% Change Q1 '22/Q1 '21
Total Subscriptions ('000)	443.68	454.49	461.91	473.62	471.52	- 0.44	6.28
Fixed to Fixed ('000 minutes)	50,032.93	45,608.55	42,782.41	41,907.82	39,505.79	-5.73	-21.04
Fixed to Mobile Calls ('000 minutes)	63,881.47	63,948.41	66,306.82	61,469.33	54,339.29	-11.60	-14.94
Total International Calls ('000 minutes)	16,269.09	15,681.41	16,614.42	13,987.54	14,886.49	6.43	-8.50
Outgoing International Calls ('000 minutes)	3,614.70	3,510.10	3,513.17	3,266.48	3,286.66	0.62	-9.08
Incoming International Calls ('000 minutes)	12,654.39	12,171.32	13,101.25	10,721.07	11,599.83	8.20	-8.33
Total Revenue (J\$ million)	2,369.75	2,533.00	2,520.17	2,629.05	2,984.83	13.53	25.96

Mobile Market	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	% Change Q1 '22/Q4 '21	% Change Q1 '22/Q1 '21
Total Subscriptions ('000)	2,844.68	2,837.94	2,849.12	2,905.41	2,919.39	0.48	2.63
Calls to Fixed Services	93,421.62	94,891.53	95,721.72	96,828.69	101,684.71	5.02	8.84
On-Net Calls ('000 minutes)	1,044,939.19	1,048,294.28	1,038,690.98	1,037,225.05	1,029,291.22	-0.76	-1.50
Off-Net Calls ('000 minutes)	1,021,511.54	1,025,583.23	1,010,028.10	994,269.81	994,245.09	0.00	-2.67
International calls	161,819.76	152,004.69	139,932.25	130,365.78	119,806.20	-8.10	-25.96
Outgoing International ('000 minutes)	117,423.96	110,004.10	100,982.19	91,334.75	81,074.43	-11.23	-30.96
Incoming International ('000 minutes)	44,395.79	42,000.59	38,950.07	39,031.03	38,731.77	-0.77	-12.76
SMS/MMS traffic ('000 # of messages)	53,062.97	51,969.52	53,785.73	99,262.25	41,161.81	-58.53	-22.43
Total Revenue (J\$ million)	12,597.10	12,985.40	13,461.67	14,419.28	13,624.44	-5.51	8.16

Internet Market	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	% Change Q1 '22/Q4 '21	% Change Q1 '22/Q1 '21
Total Subscriptions ('000)	2,123.52	2,176.38	2,177.20	2,151.68	2,165.46	0.64	1.98
Fixed Broadband (≥256K)	386.16	394.73	400.95	413.50	416.12	0.63	7.76
WAP & Mobile Internet	1,737.36	1,781.65	1,776.25	1,738.18	1,749.34	0.64	0.69
Total Revenue (J\$ million)	10,211.36	10,610.97	10,927.41	12,104.34	12,351.10	2.04	20.95

Penetration Rate	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022
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