
Office of Utilities Regulation

Telecommunications Market Information Report October - December 2022



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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

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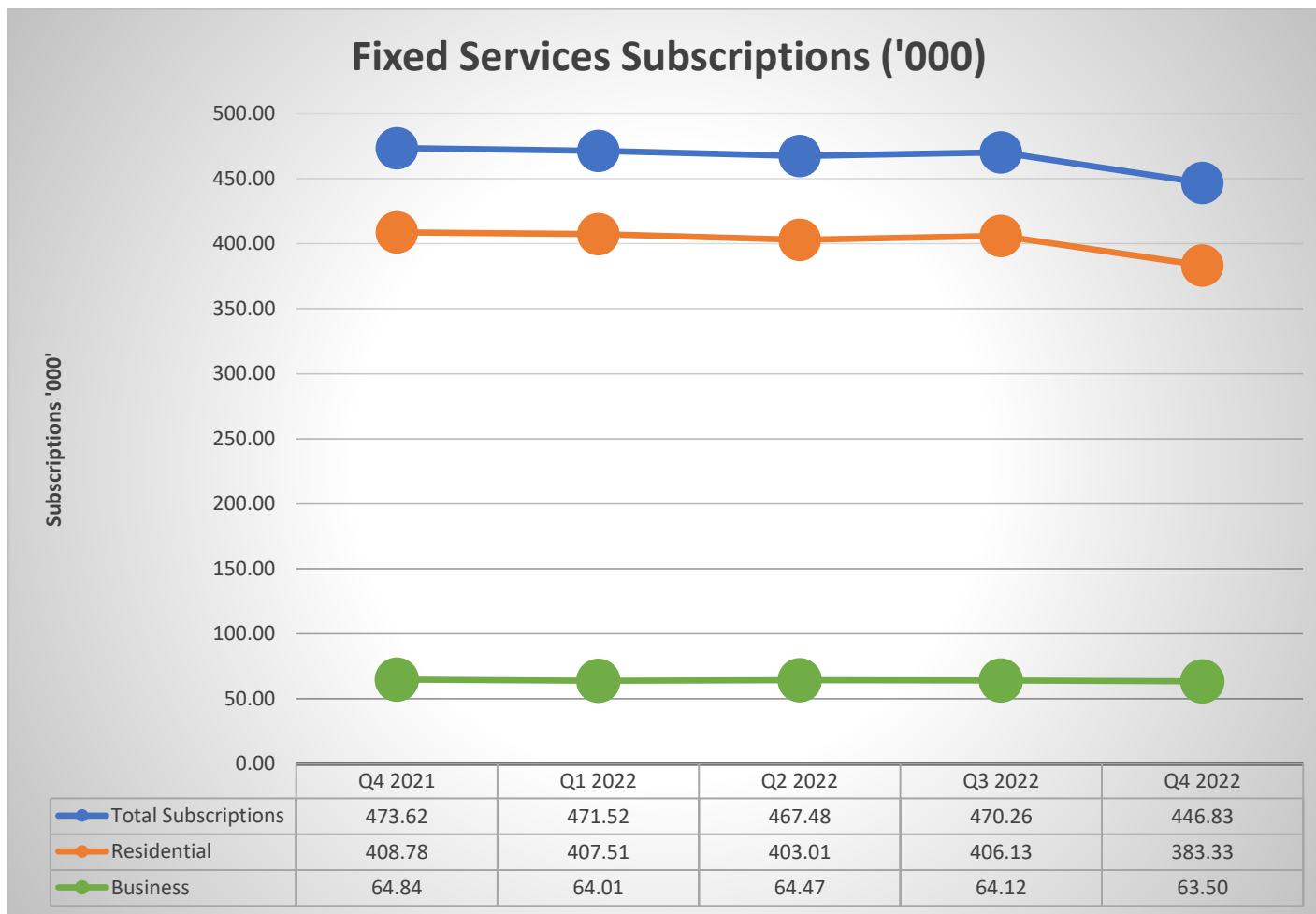
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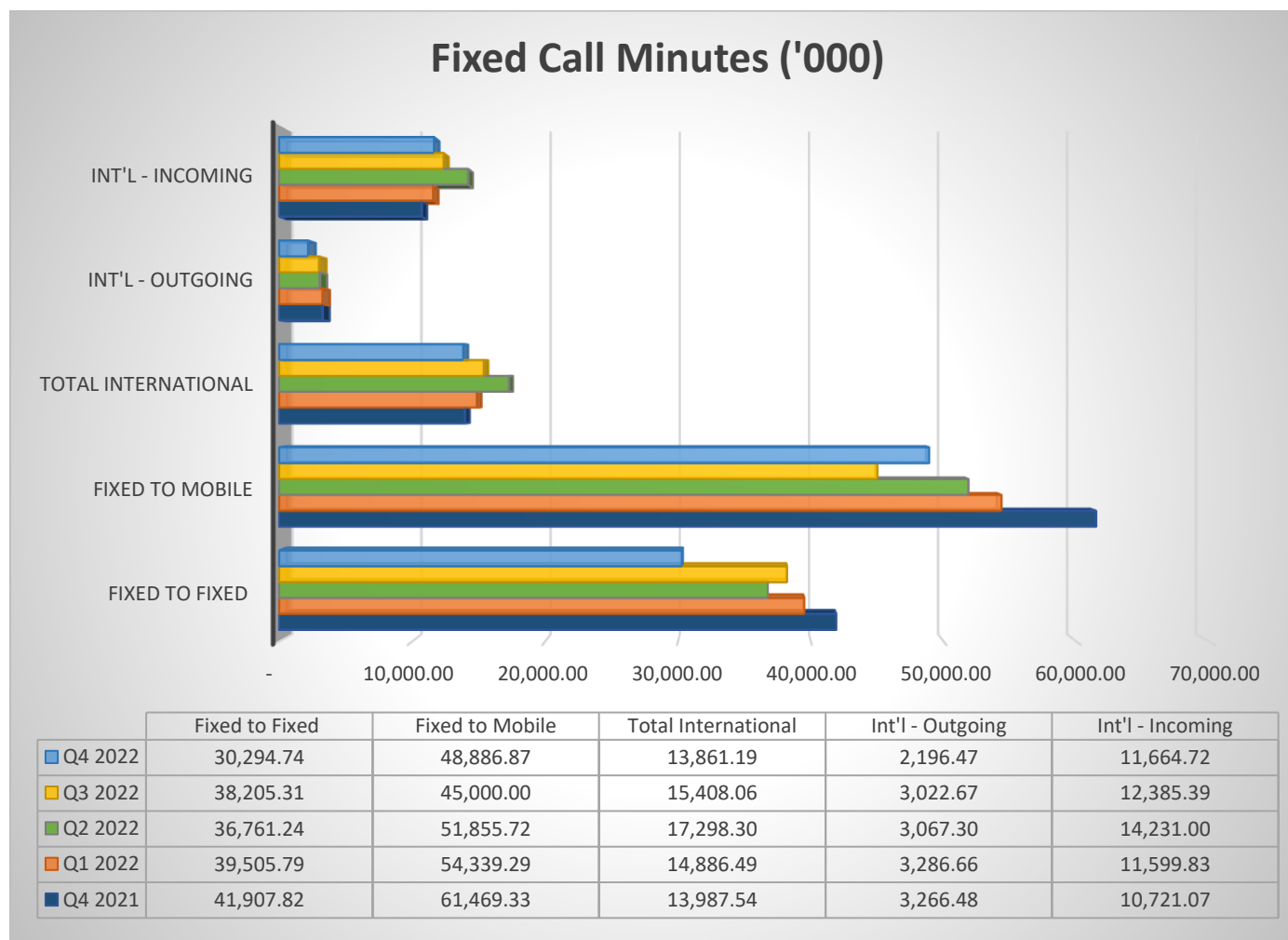
Fixed Market Data

Figure 1: Fixed Services Subscriptions



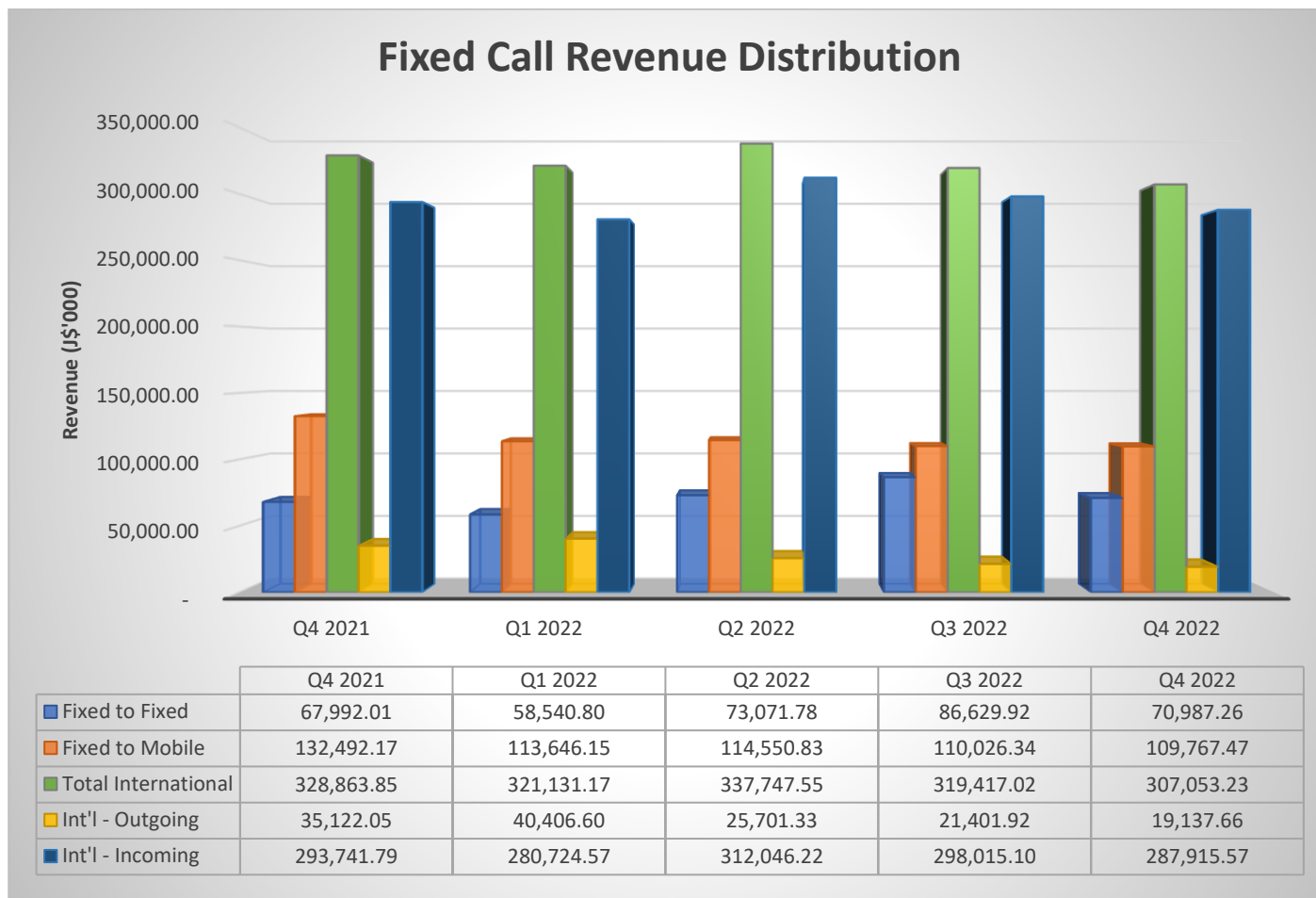
% Change: Q4 '22/Q3 '22	
Total Subscriptions:	- 4.98%
Residential:	-5.61%
Business:	- 0.97%

Figure 2: Fixed Call Minutes



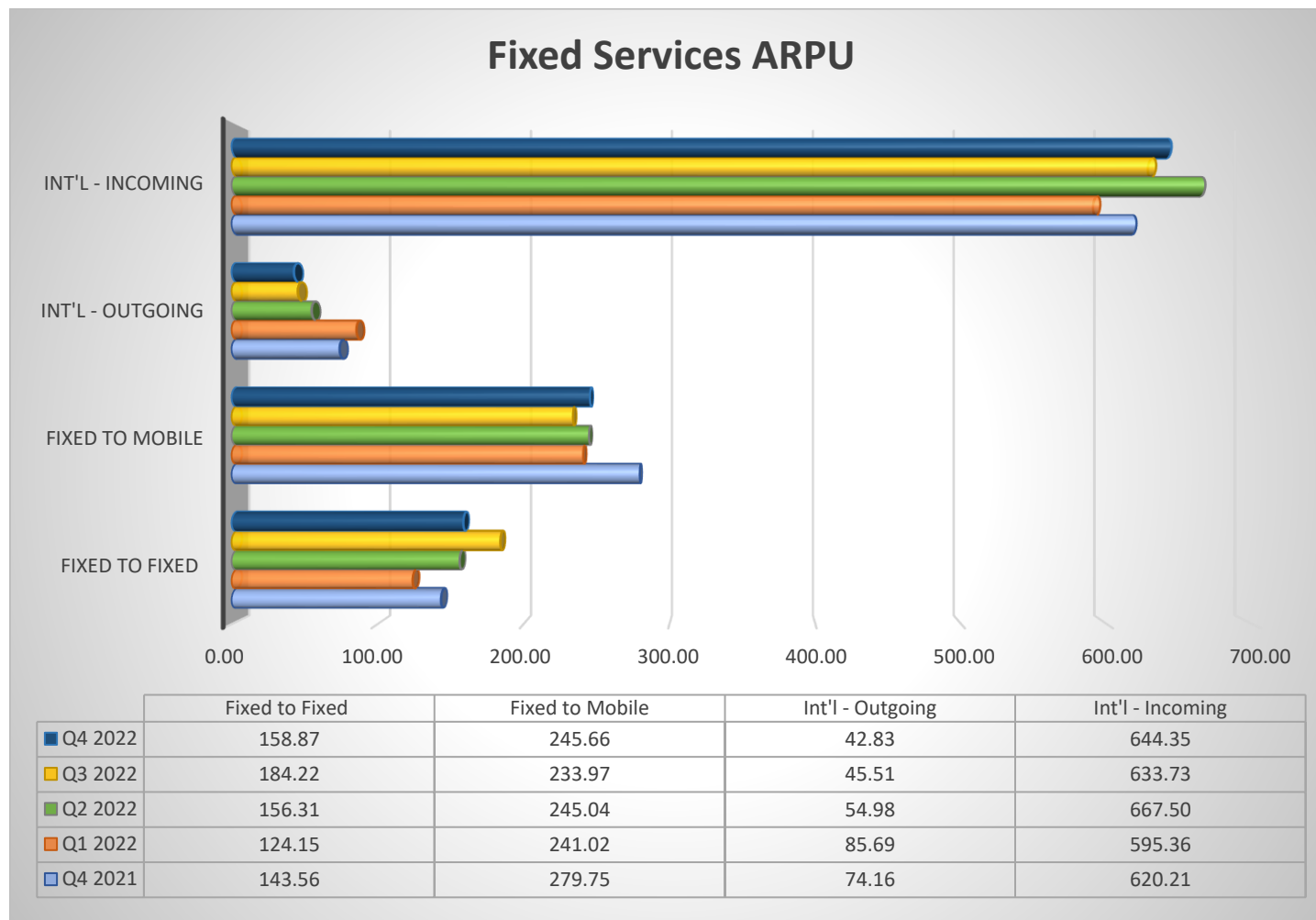
% Change: Q4 '22/Q3 '22	
Fixed to Fixed:	-20.71%
Fixed to Mobile:	8.64%
Total International:	-10.04%
Int'l - Outgoing:	-27.33%
Int'l - Incoming:	-5.82%

Figure 3: Fixed Call Revenue Distribution



<u>% Change Q4 '22/Q3 '22</u>	
Fixed to Fixed:	-18.06%
Fixed to Mobile:	- 0.24%
Total International:	- 3.87%
Int'l - Outgoing:	- 10.58%
Int'l - Incoming:	- 3.39%

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

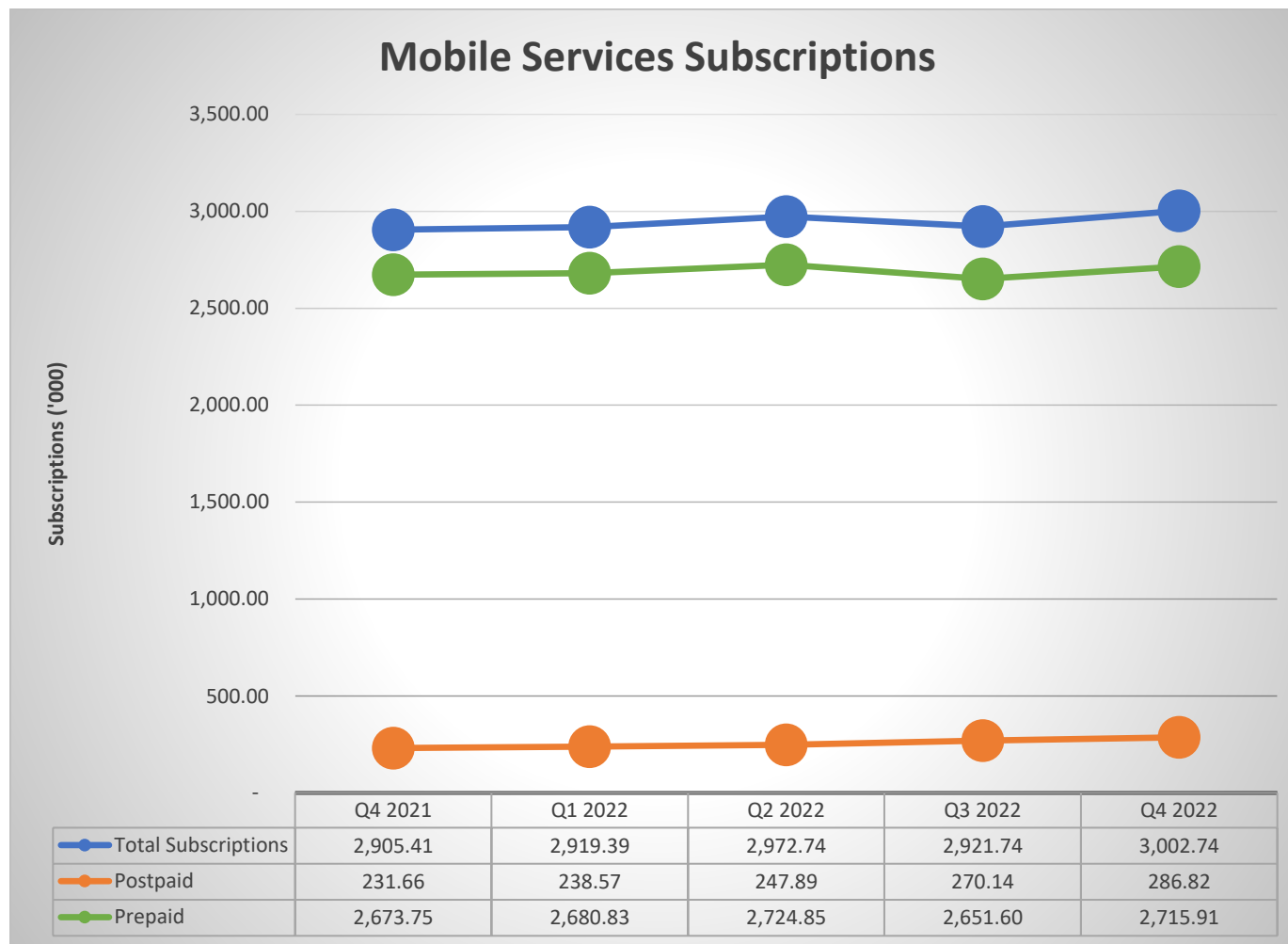


% Change: Q4 '22/Q3 '22

Fixed to Fixed:	-13.76%
Fixed to Mobile:	4.99%
Int'l - Outgoing:	-5.89%
Int'l - Incoming:	1.68%

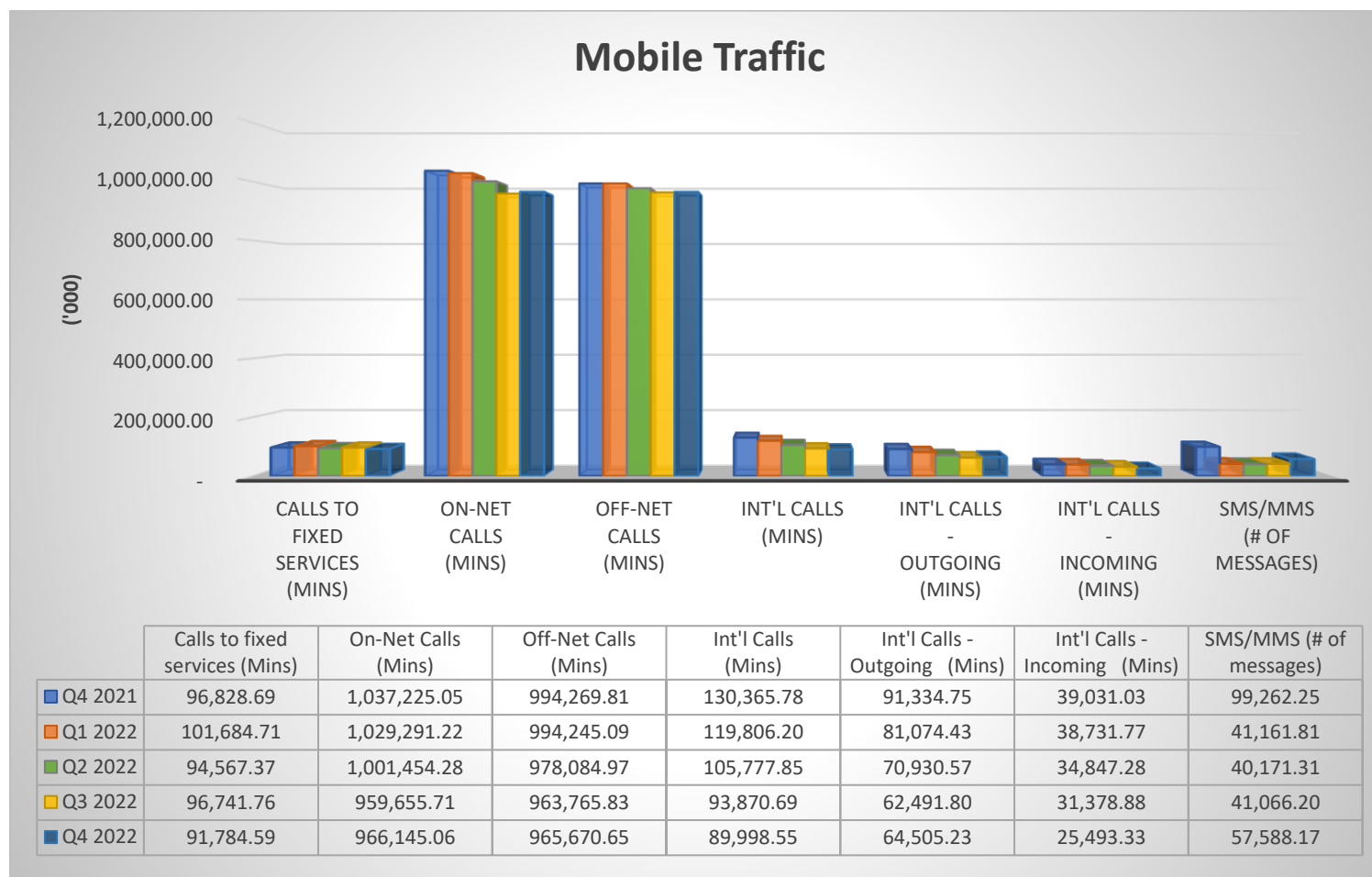
Mobile Market Data

Figure 5: Mobile Services Subscriptions



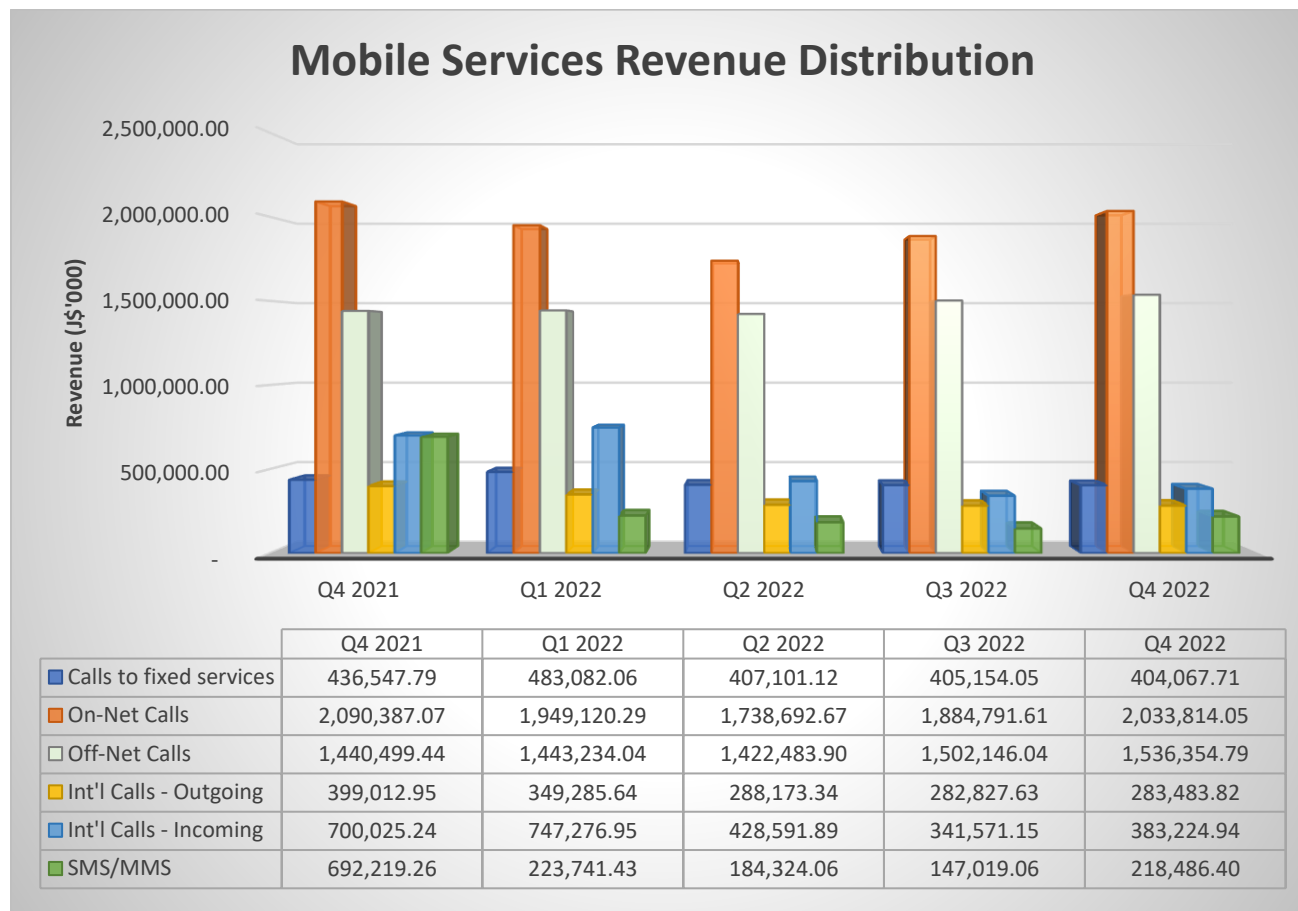
% Change: Q4 '22/Q3 '22	
Total Subscriptions:	2.77%
Postpaid:	6.17%
Prepaid:	2.43%

Figure 6: Mobile Traffic



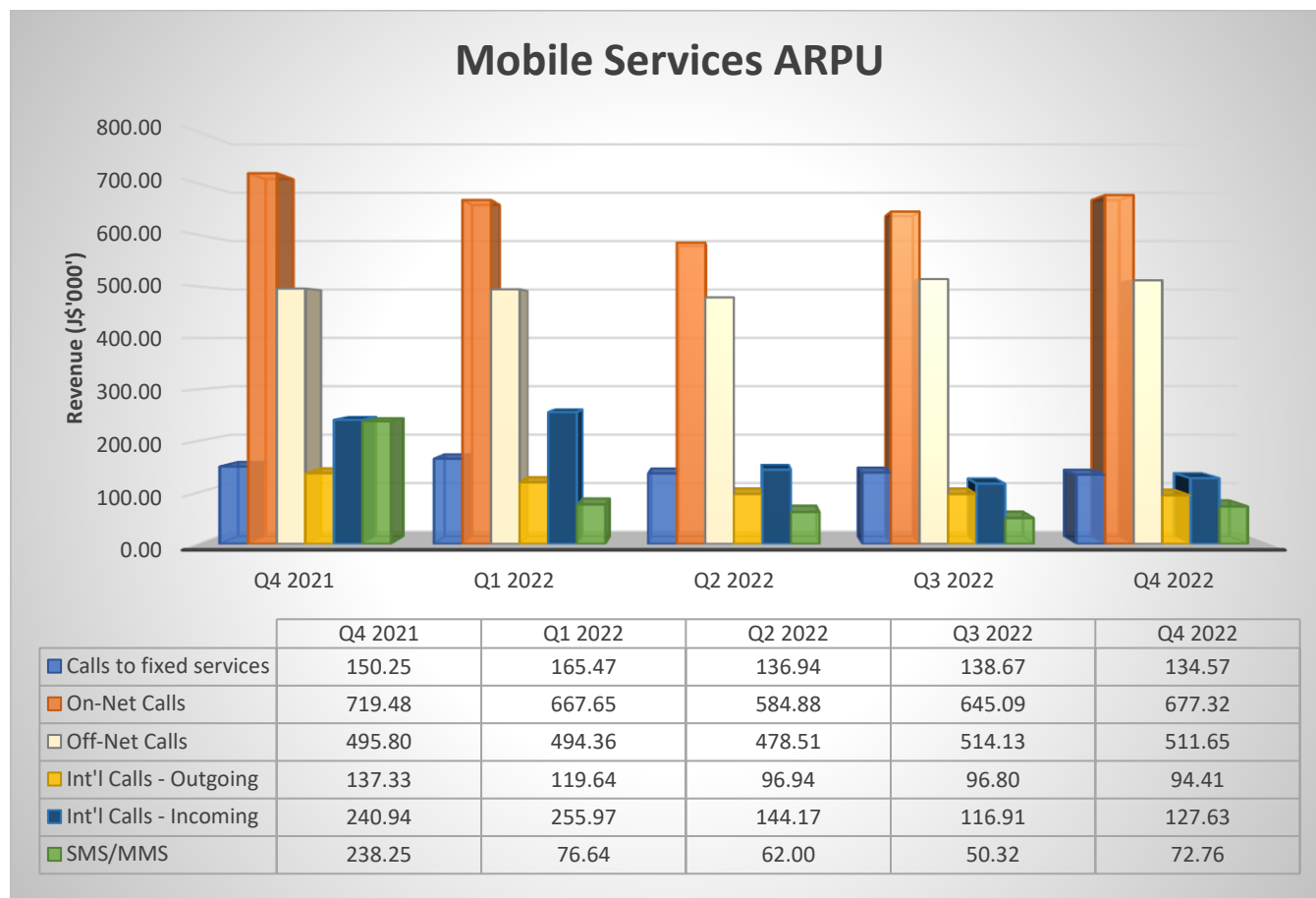
% Change: Q4 '22/Q3 '22	
Calls to Fixed Service:	-5.12%
On-Net Calls:	0.68%
Off-Net Calls:	0.20%
Int'l Calls:	-4.12%
Int'l Calls – Outgoing:	3.22%
Int'l Calls – Incoming:	-18.76%
SMS/MMS:	40.23%

Figure 7: Mobile Services Revenue Distribution



% Change: Q4 '22/Q3 '22	
Calls to Fixed Service	- 0.27%
On-Net Calls:	7.91%
Off-Net Calls:	2.28%
Int'l Calls – Outgoing:	0.23%
Int'l Calls – Incoming:	12.19%
SMS/MMS:	48.61%

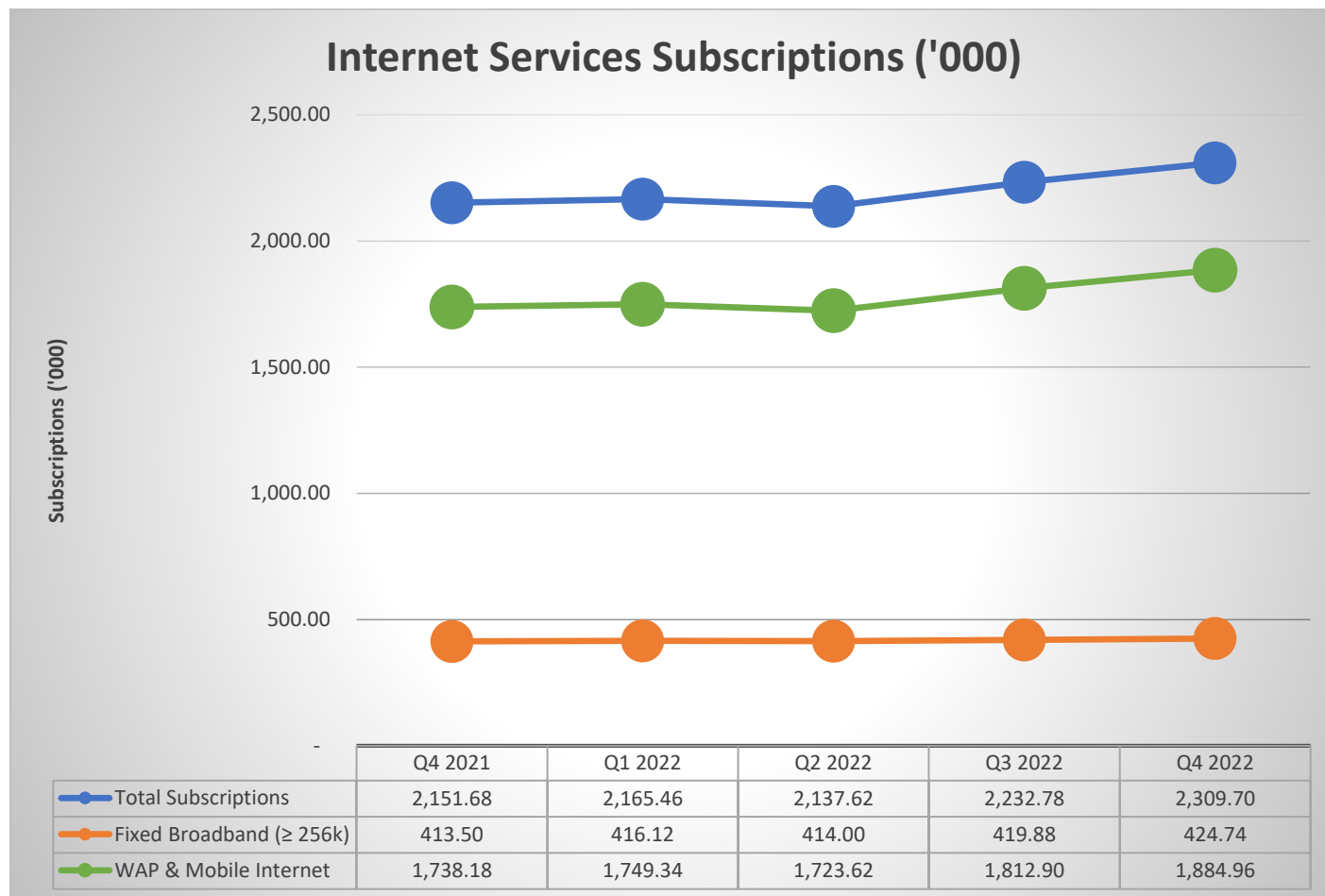
Figure 8: Mobile Services Average Revenue per User (ARPU)



% Change: Q4 '22/Q3 '22	
Calls to Fixed Service	-2.96%
On-Net Calls:	5.00%
Off-Net Calls:	-0.48%
Int'l Calls – Outgoing:	- 2.47%
Int'l Calls – Incoming:	-9.17%
SMS/MMS:	44.60%

Internet Market Data

Figure 9: Internet Services Subscriptions



<u>% Change: Q4 '22/Q3 '22</u>	
Total Subscriptions:	3.45%
Fixed Broadband (≥ 256k):	1.16%
WAP & Mobile Internet:	3.98%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022
Fixed Subscription Penetration Rate	17.3%	17.3%	17.1%	17.1%	16.3%
Mobile Subscription Penetration Rate	106.3%	106.8%	108.7%	106.9%	109.8%
Fixed Broadband Subscription Penetration Rate	15.1%	15.2%	15.1%	15.4%	15.5%
Mobile Broadband Subscription Penetration Rate	63.6%	64.0%	63.0%	66.3%	69.0%
Total Broadband Subscription Penetration Rate	78.7%	79.2%	78.2%	81.7%	84.5%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022
Fixed HHI	4,398	4,424	4,387	4,389	4,206
Mobile HHI	5,061	5,066	5,063	5,017	5,034
Fixed Broadband HHI	3,735	3,693	3,658	3,643	3,626
Mobile Broadband HHI	5,027	5,031	5,020	5,022	5,051

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 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	% Change Q4 '22/Q3 '22	% Change Q4 '22/Q4'21
Total Subscriptions ('000)	473.62	471.52	467.48	470.26	446.83	-4.98	-5.66
Fixed to Fixed ('000 minutes)	41,907.82	39,505.79	36,761.24	38,205.31	30,294.74	-20.71	-27.71
Fixed to Mobile Calls ('000 minutes)	61,469.33	54,339.29	51,855.72	45,000.00	48,886.87	8.64	-20.47
Total International Calls ('000 minutes)	13,987.54	14,886.49	17,298.30	15,408.06	13,861.19	-10.04	-0.90
Outgoing International Calls ('000 minutes)	3,266.48	3,286.66	3,067.30	3,022.67	2,196.47	-27.33	-32.76
Incoming International Calls ('000 minutes)	10,721.07	11,599.83	14,231.00	12,385.39	11,664.72	-5.82	8.80
Total Revenue (J\$ million)	2,629.05	2,984.83	2,711.06	2,515.57	2,528.30	0.51	-3.83

Mobile Market	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	% Change Q4 '22/Q3 '22	% Change Q4 '22/Q4 '21
Total Subscriptions ('000)	2,905.41	2,919.39	2,972.74	2,921.74	3,002.74	2.77	3.35
Calls to Fixed Services	96,828.69	101,684.71	94,567.37	96,741.76	91,784.59	-5.12	-5.21
On-Net Calls ('000 minutes)	1,037,225.05	1,029,291.22	1,001,454.28	959,655.71	966,145.06	0.68	-6.85
Off-Net Calls ('000 minutes)	994,269.81	994,245.09	978,084.97	963,765.83	965,670.65	0.20	-2.88
International calls	130,365.78	119,806.20	105,777.85	93,870.69	89,998.55	-4.12	-30.96
Outgoing International ('000 minutes)	91,334.75	81,074.43	70,930.57	62,491.80	64,505.23	3.22	-29.37
Incoming International ('000 minutes)	39,031.03	38,731.77	34,847.28	31,378.88	25,493.33	-18.76	-34.68
SMS/MMS traffic ('000 # of messages)	99,262.25	41,161.81	40,171.31	41,066.20	57,588.17	40.23	-41.98
Total Revenue (J\$ million)	14,419.28	13,624.44	12,391.76	12,837.72	12,985.69	1.15	-9.94

Internet Market	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	% Change Q4 '22/Q3 '22	% Change Q4 '22/Q4 '21
Total Subscriptions ('000)	2,151.68	2,165.46	2,137.62	2,232.78	2,309.70	3.45	7.34
Fixed Broadband (≥256K)	413.50	416.12	414.00	419.88	424.74	1.16	2.72
WAP & Mobile Internet	1,738.18	1,749.34	1,723.62	1,812.90	1,884.96	3.98	8.44
Total Revenue (J\$ million)	12,104.34	12,351.10	11,466.41	11,919.78	12,238.57	2.67	1.11

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