
Office of Utilities Regulation

Telecommunications Market Information Report January - December 2023



Telecommunications Market Information Report: January - December 2023
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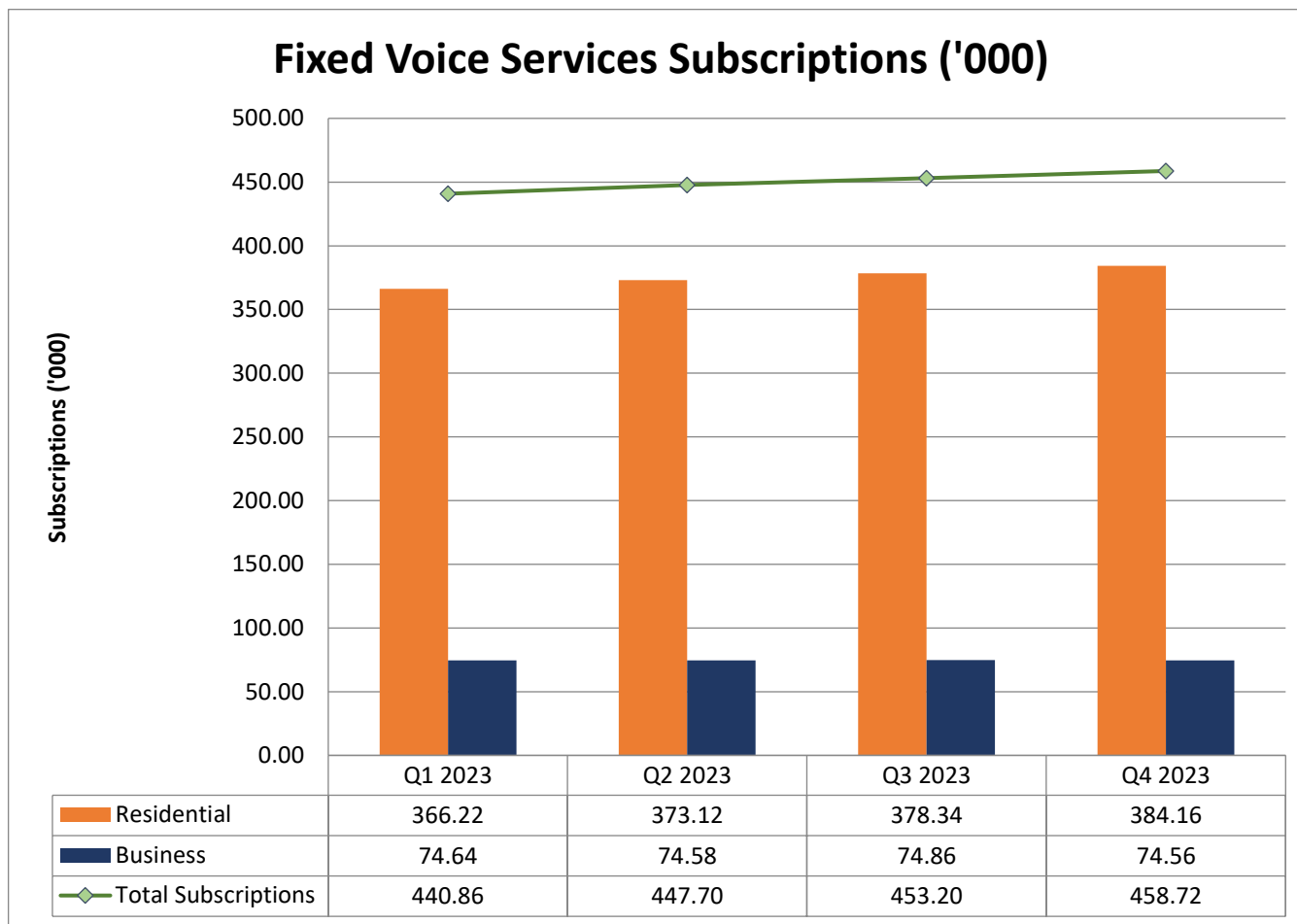
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Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions



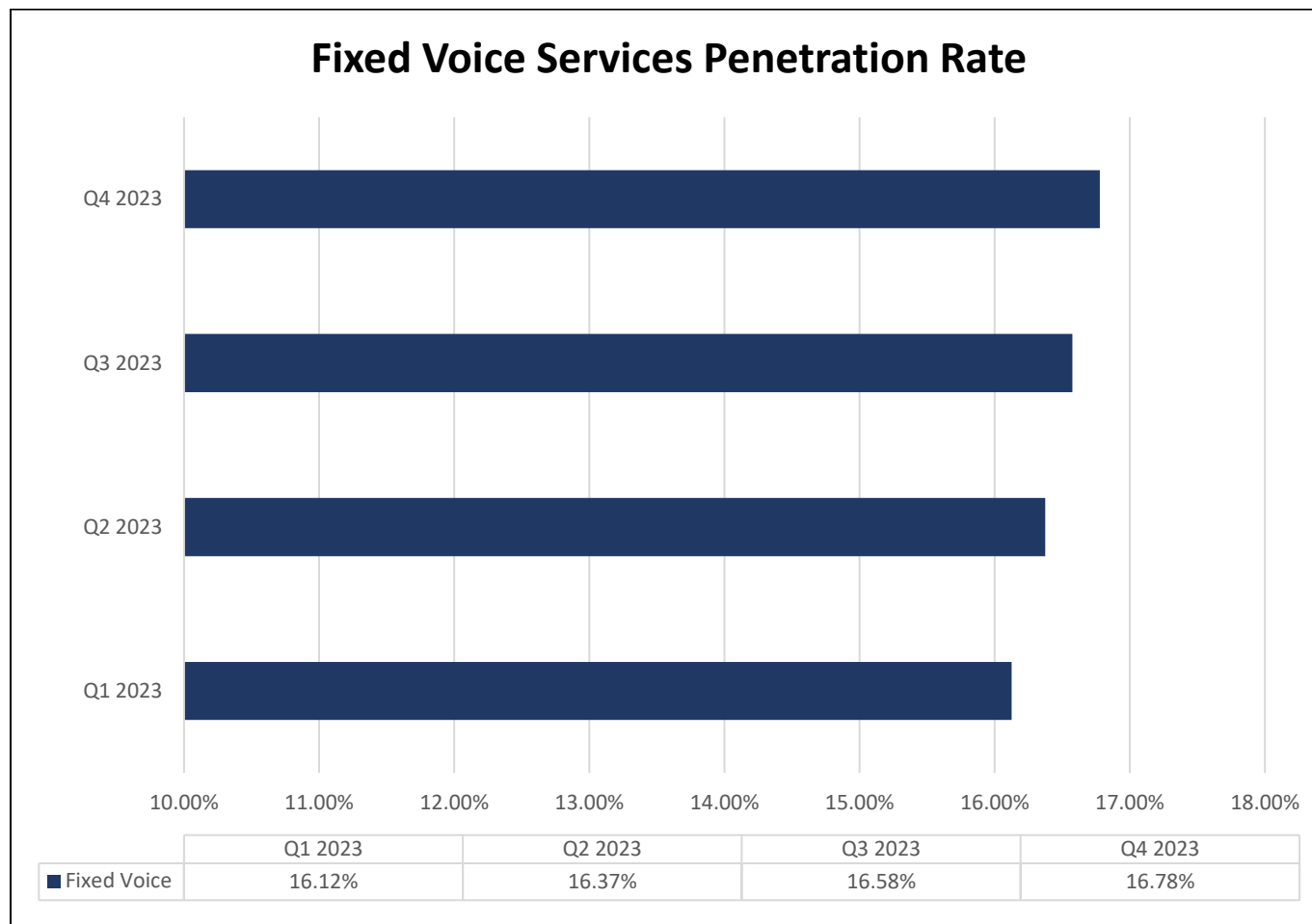
% Change: Q4 '23/Q3 '23

Total Subscriptions:
1.22%

Residential:
1.54%

Business:
- 0.40%

Figure 2: Fixed Voice Services Penetration Rate



% Change: Q4 '23/Q3 '23
1.22%

Figure 3: Gross Revenues from Domestic Fixed Voice Services

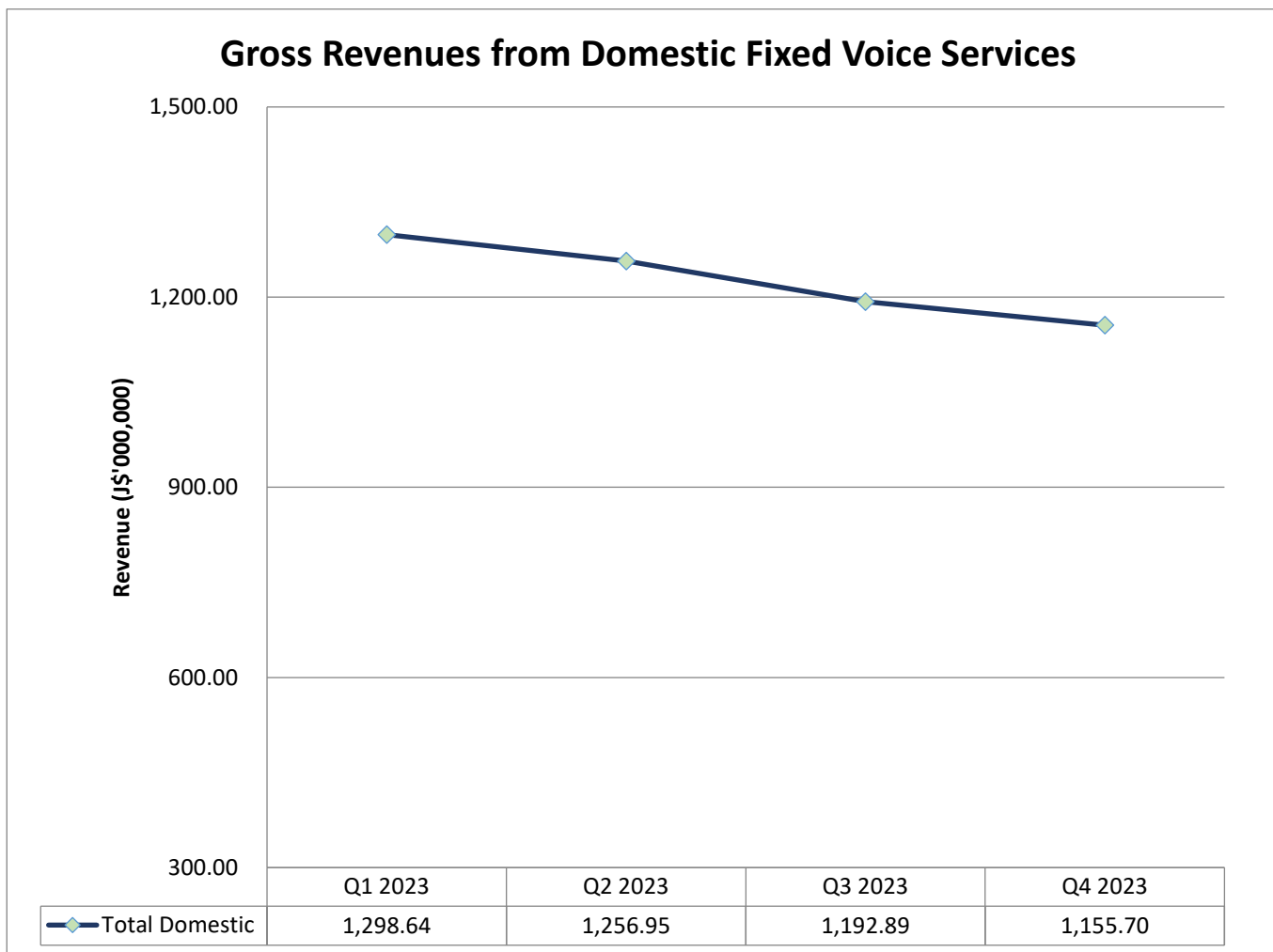
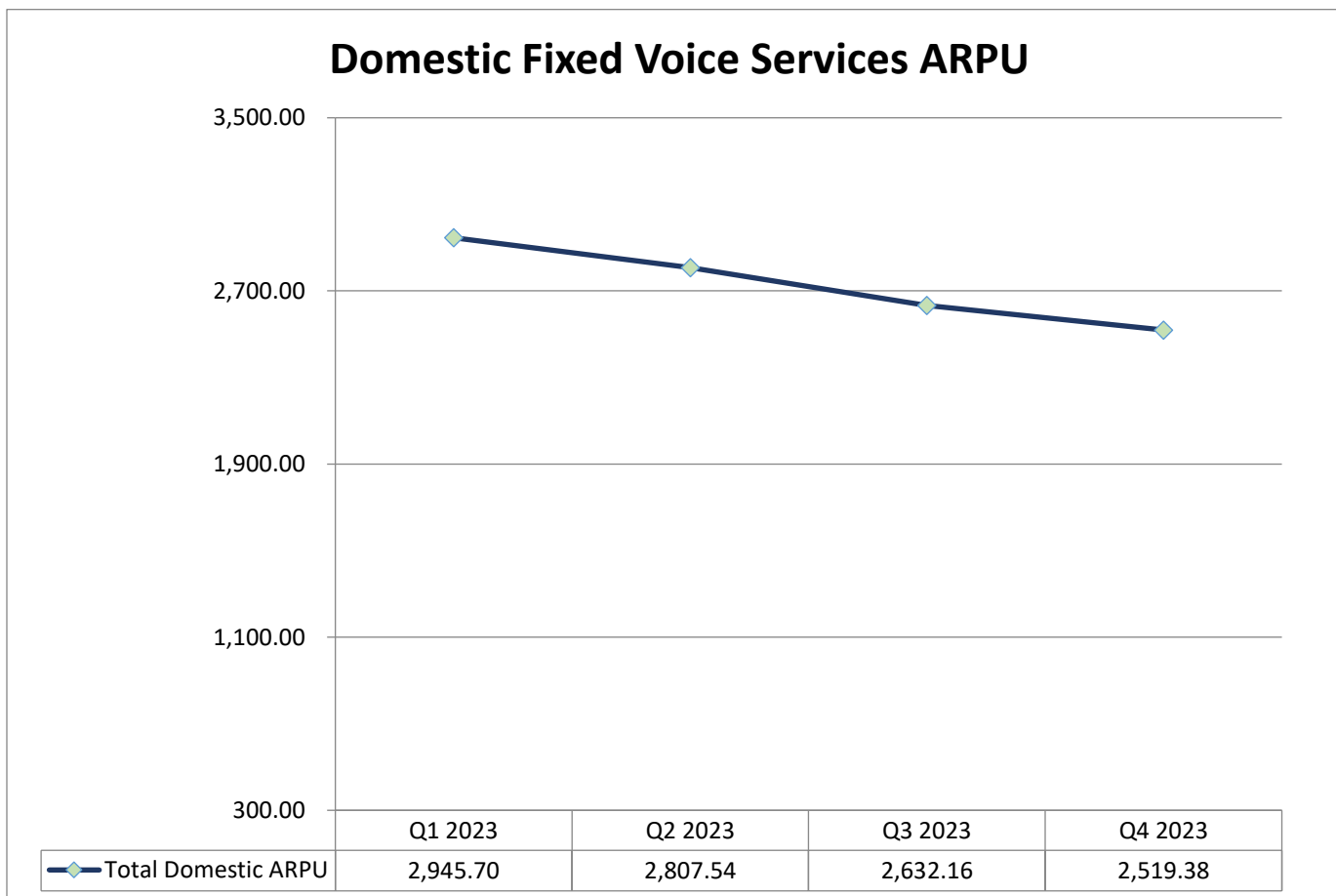
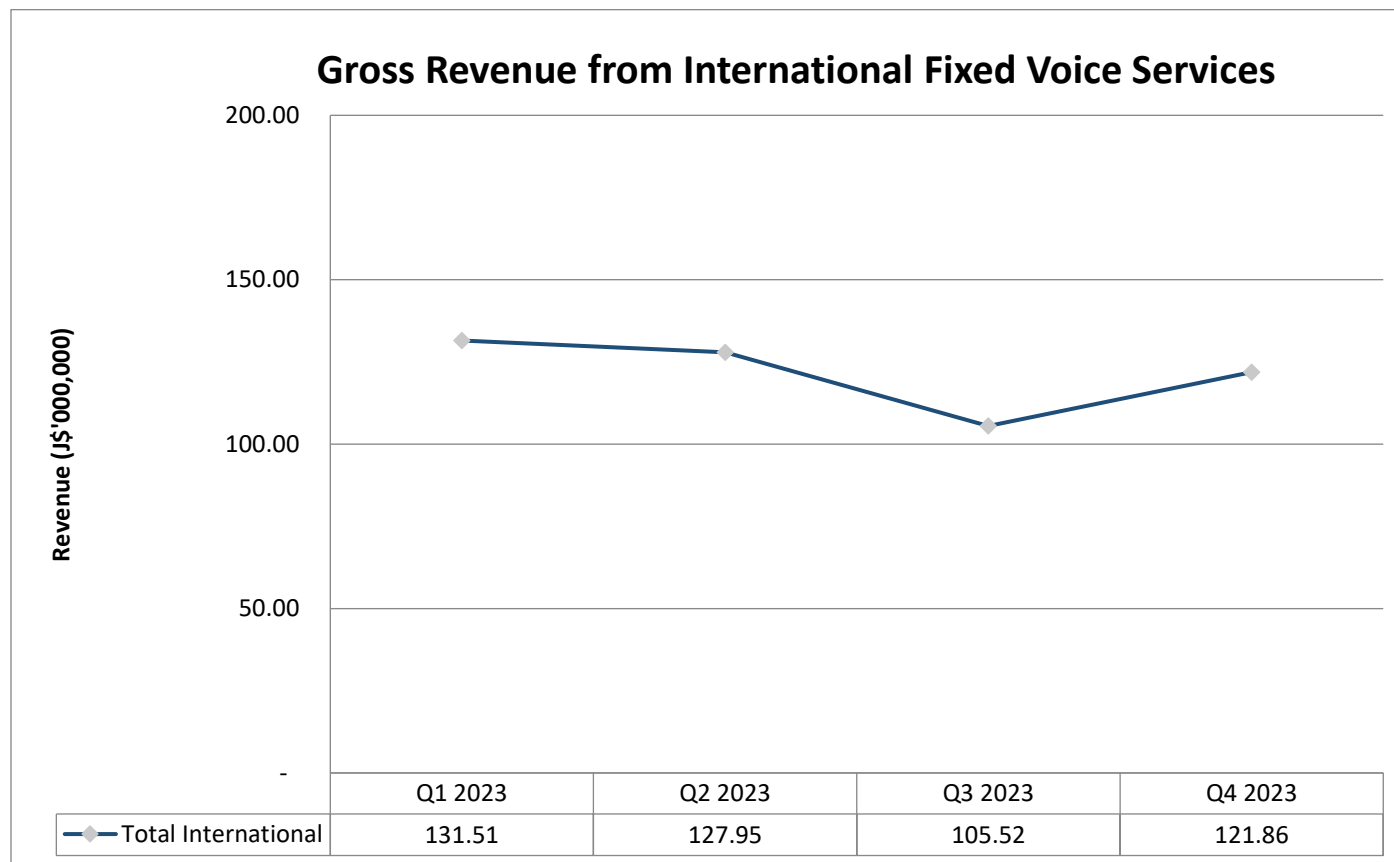


Figure 4: Domestic Fixed Voice Services Average Revenue per User (ARPU)



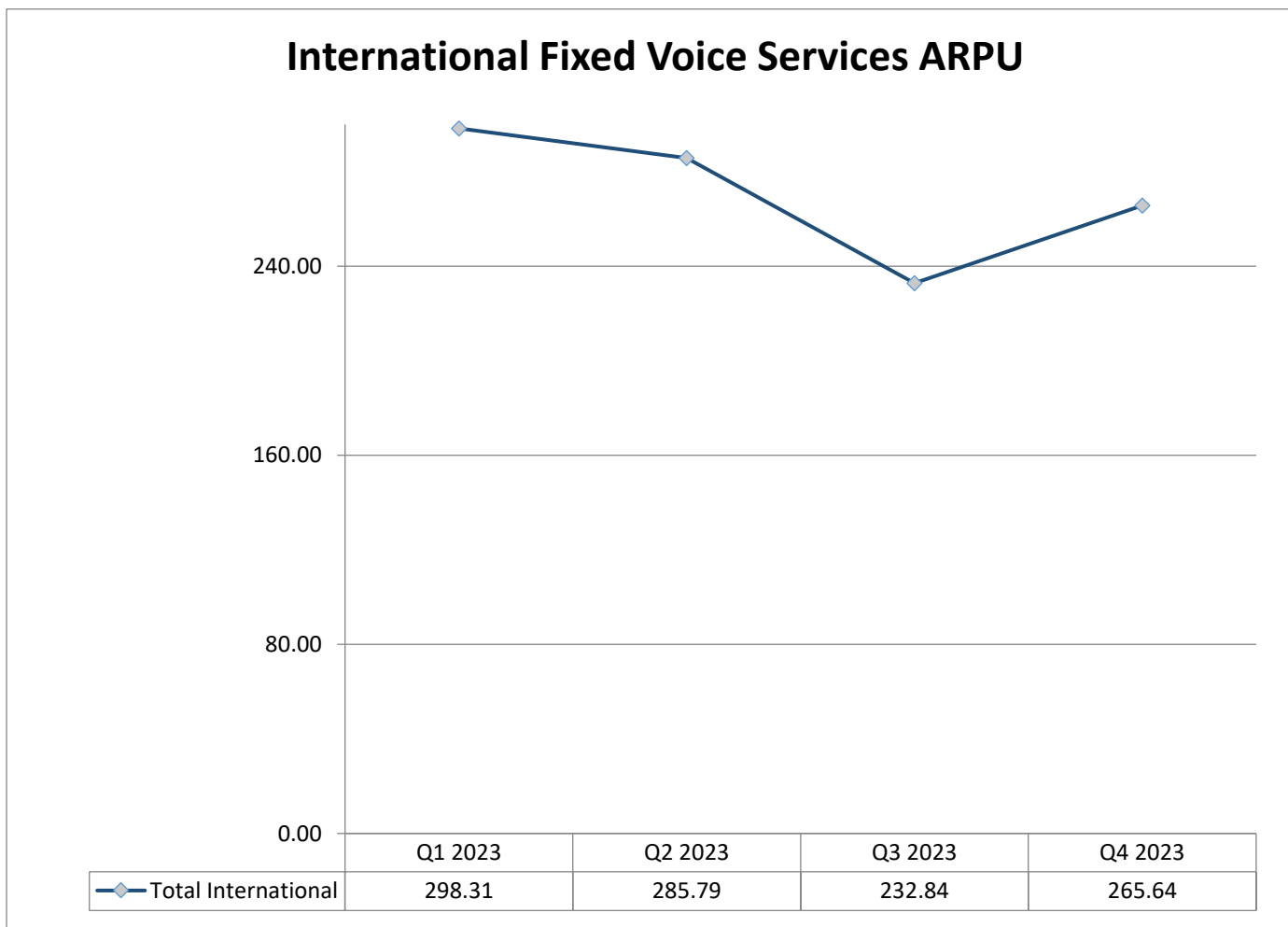
% Change: Q4 '23/Q3 '23
-4.28%

Figure 5: Gross Revenue from International Fixed Voice Services



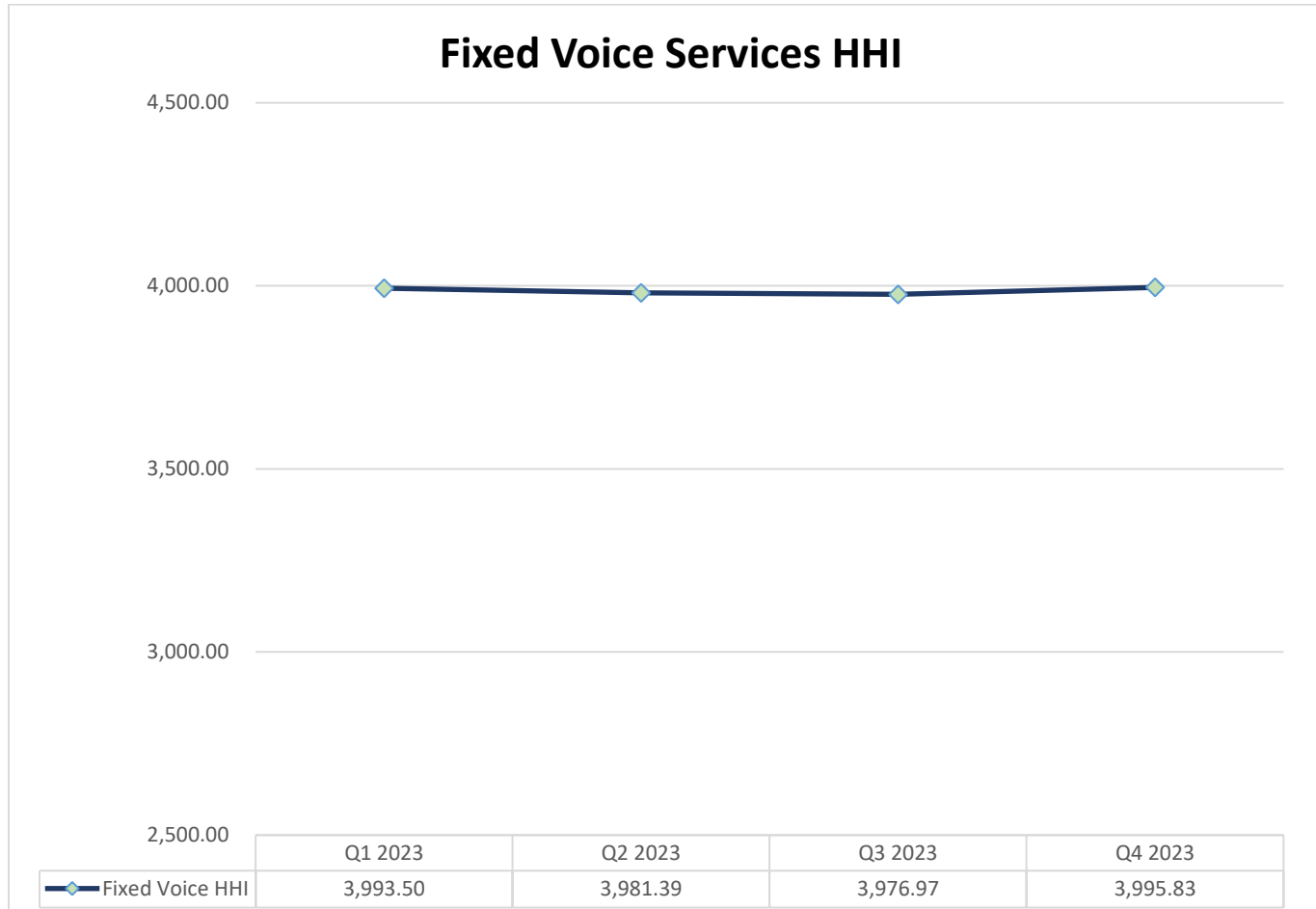
% Change: Q4 '23/Q3 '23
15.48%

Figure 6: International Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q4 '23/Q3 '23
14.09%

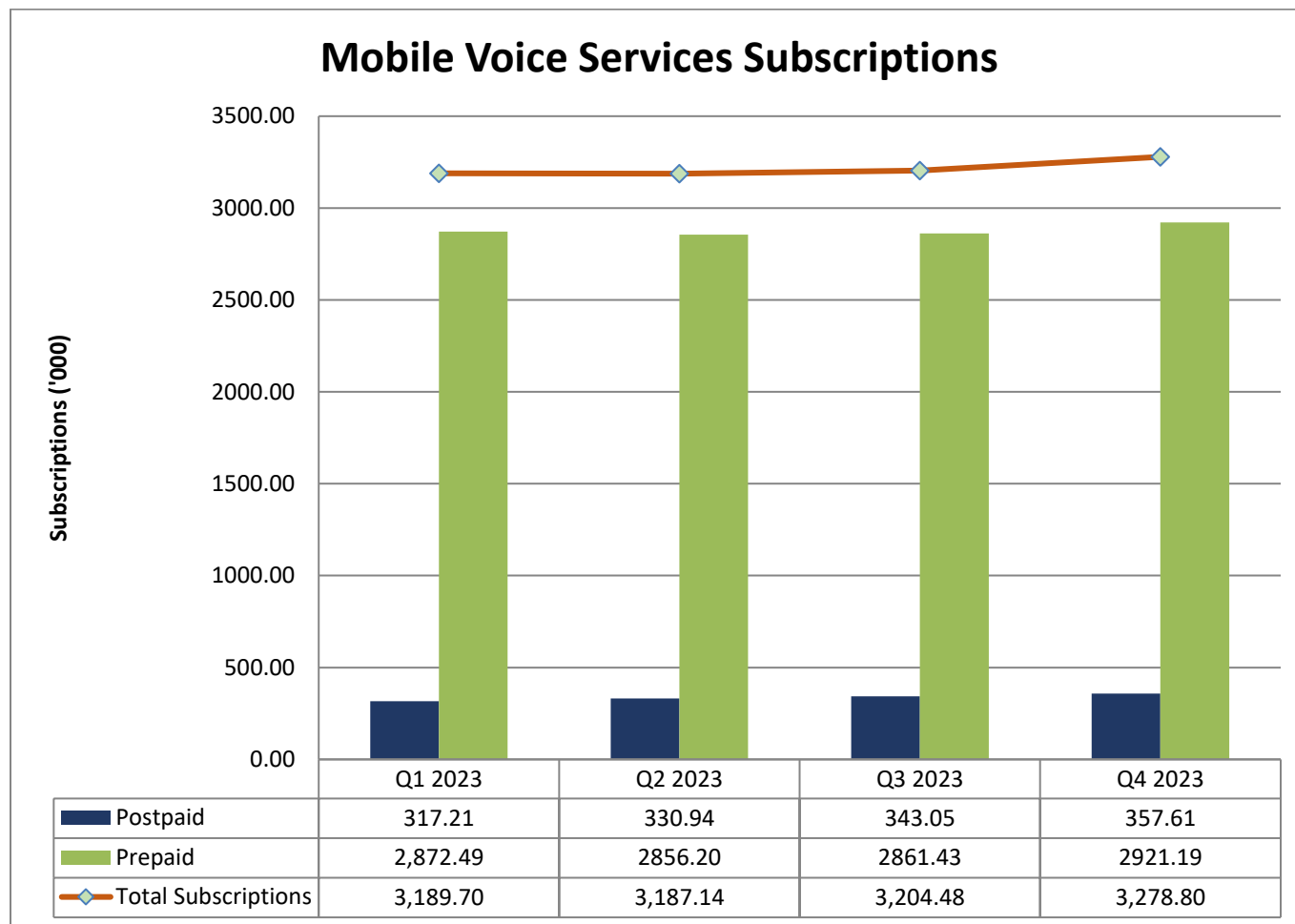
Figure 7: Fixed Voice Services Herfindahl-Hirschman Index (HHI)



% Change: Q4 '23/Q3 '23
0.47%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



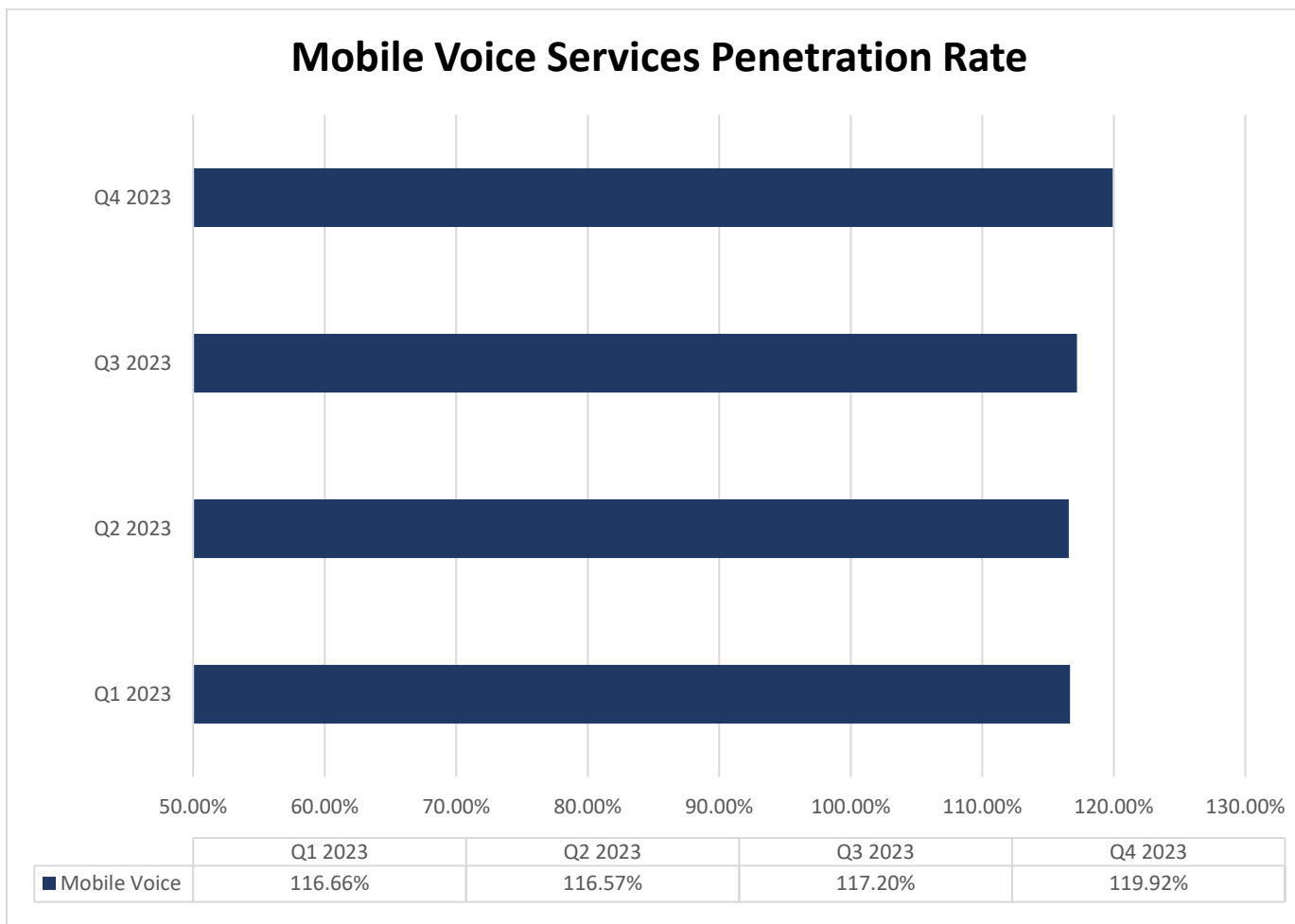
% Change: Q4 '23/Q3 '23

Total Subscriptions:
2.32%

Postpaid:
4.24%

Prepaid:
2.09%

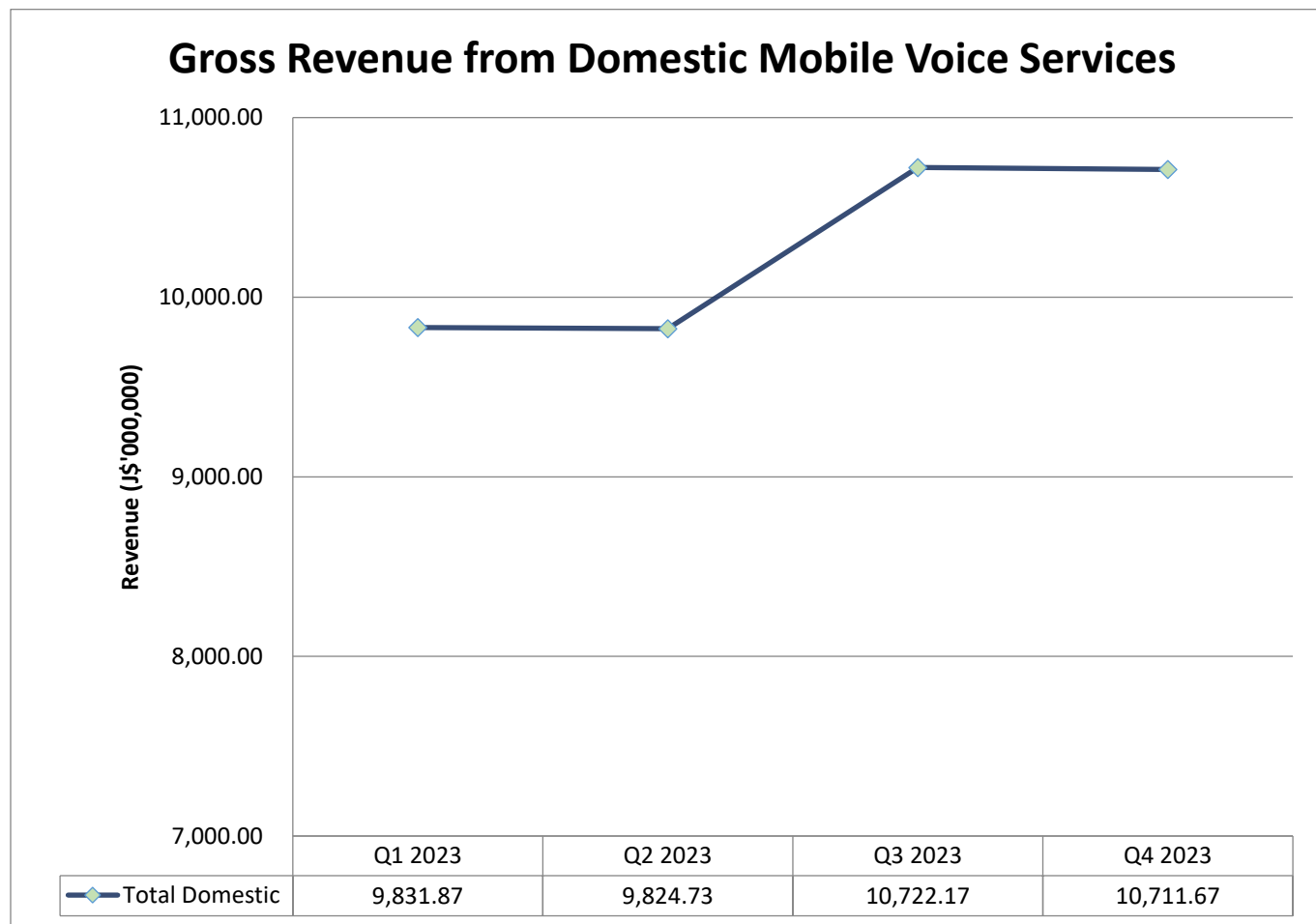
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q4 '23/Q3 '23

2.32%

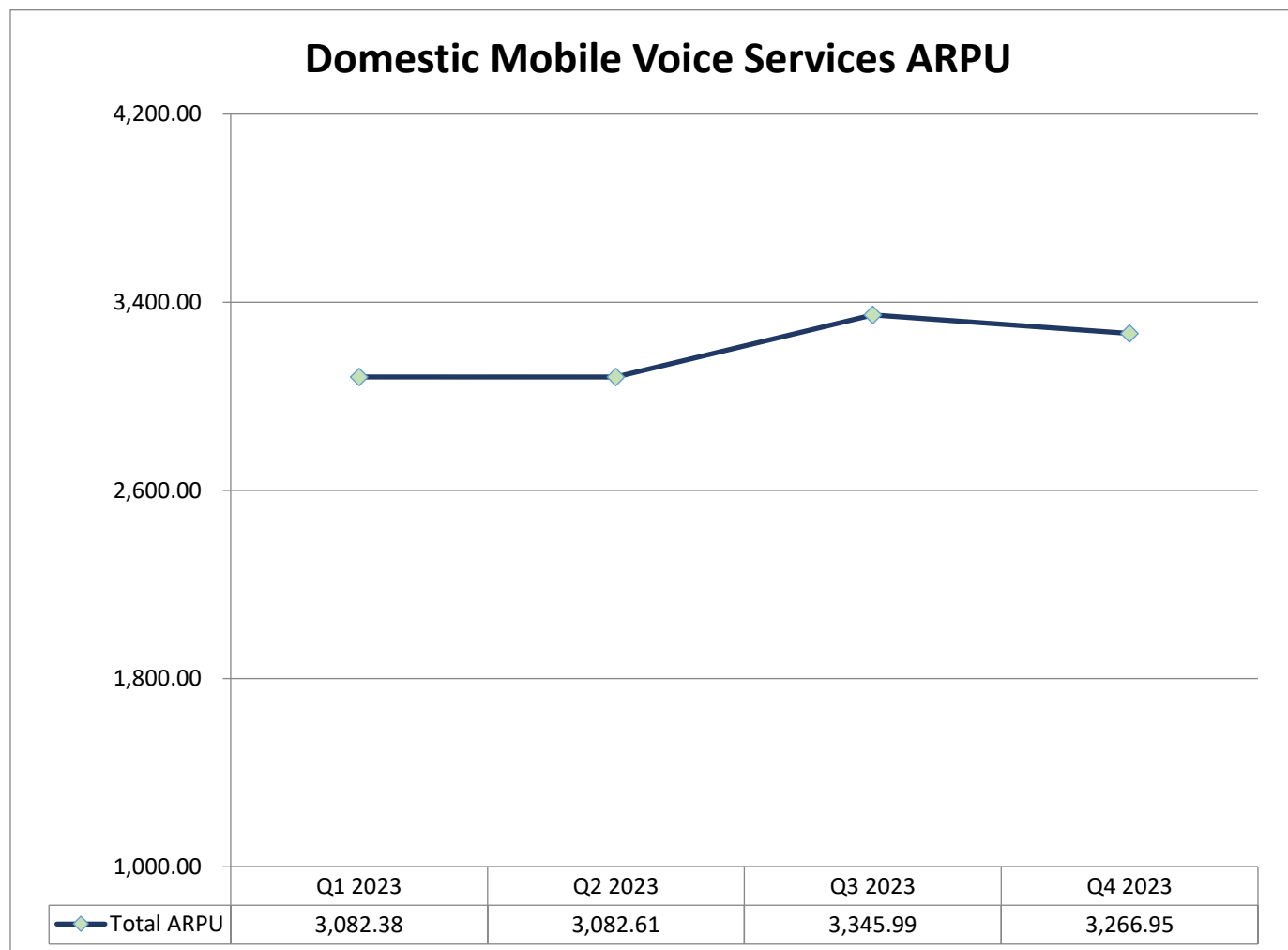
Figure 10: Gross Revenue from Domestic Mobile Voice Services



% Change: Q4 '23/Q3 '23

-0.10%

Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)



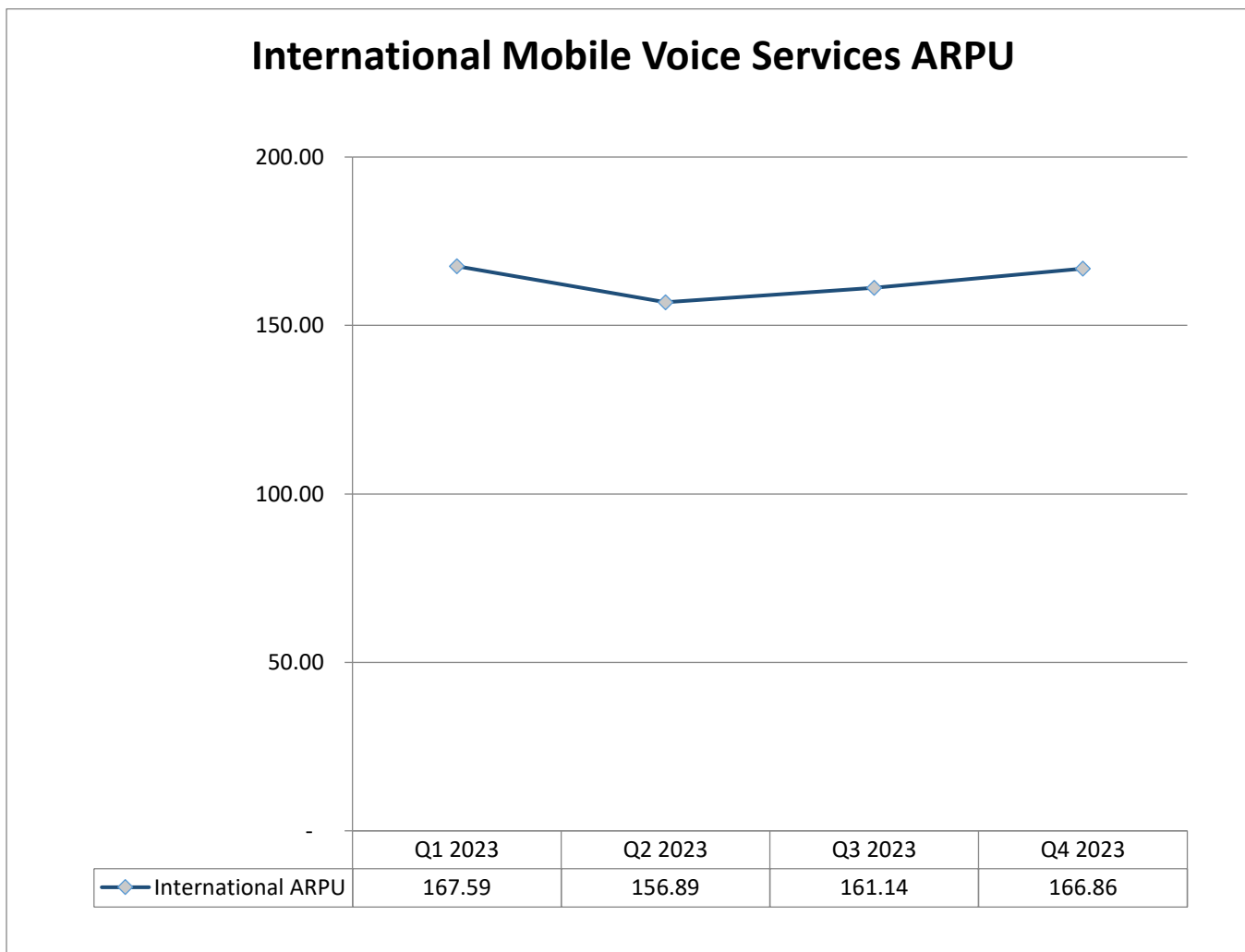
% Change: Q4 '23/Q3 '23
-2.36%

Figure 12: Gross Revenue from International Mobile Voice Services



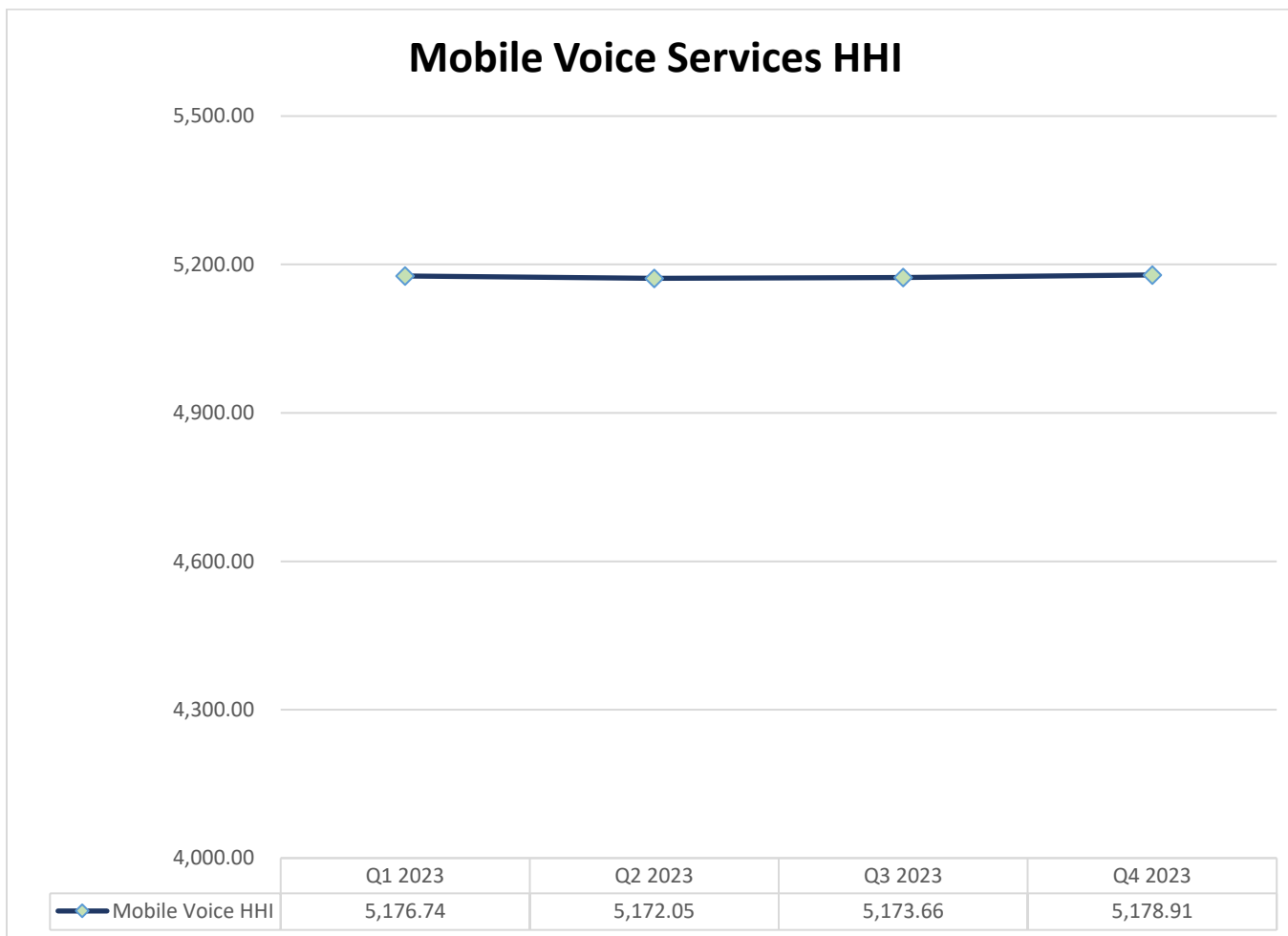
% Change: Q4 '23/Q3 '23
5.95%

Figure 13: International Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q4 '23/Q3 '23
3.55%

Figure 14: Mobile Voice Services Herfindahl-Hirschman Index (HHI)

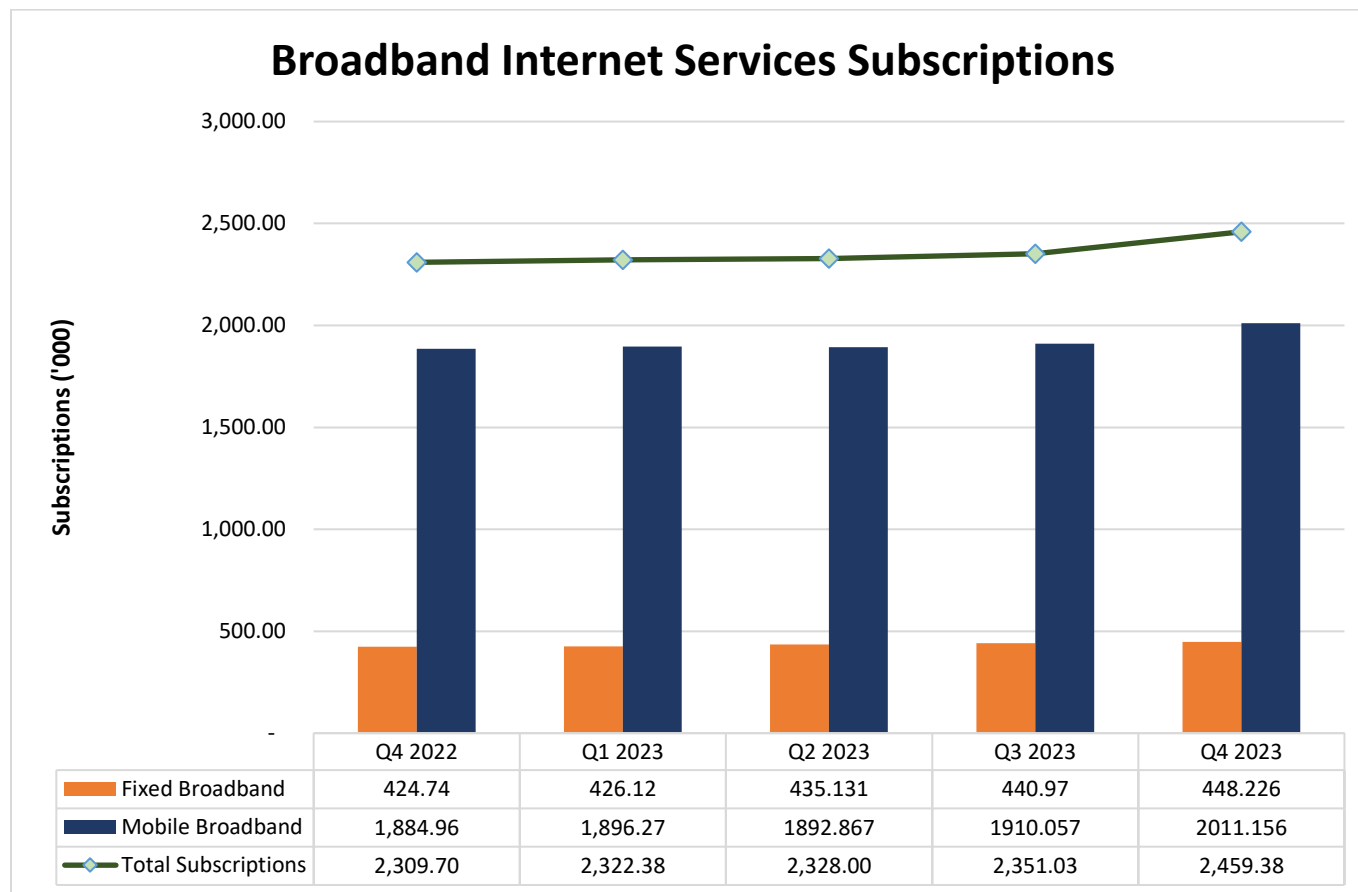


% Change: Q4 '23/Q3 '23

0.10%

Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions



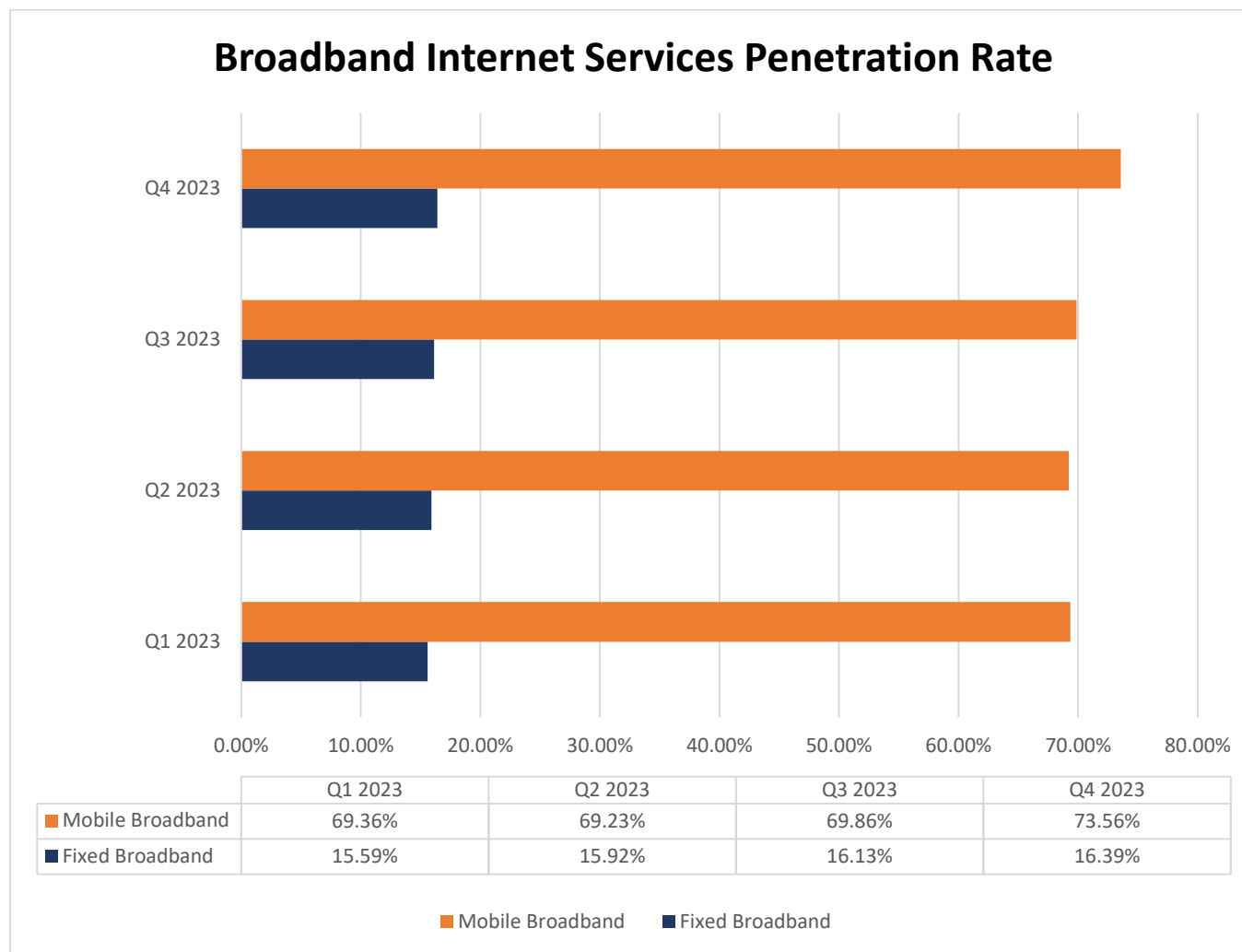
% Change: Q4 '23/Q3 '23

Total Subscriptions:
4.61%

Fixed Broadband:
1.65%

Mobile Broadband:
5.29%

Figure 16: Broadband Internet Penetration Rate

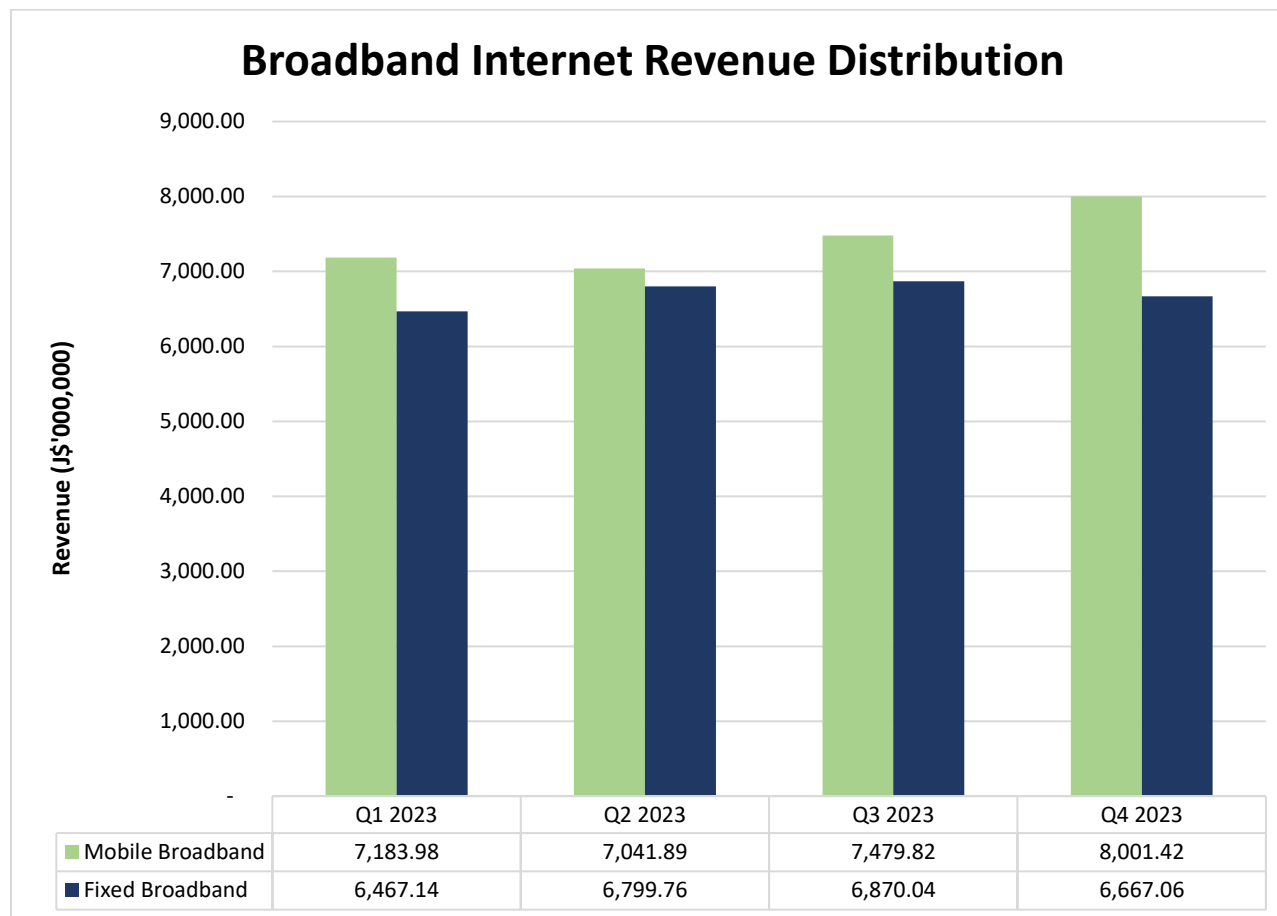


% Change: Q4 '23/Q3 '23

Fixed Broadband:
1.65%

Mobile Broadband:
5.29%

Figure 17: Broadband Internet Revenue Distribution

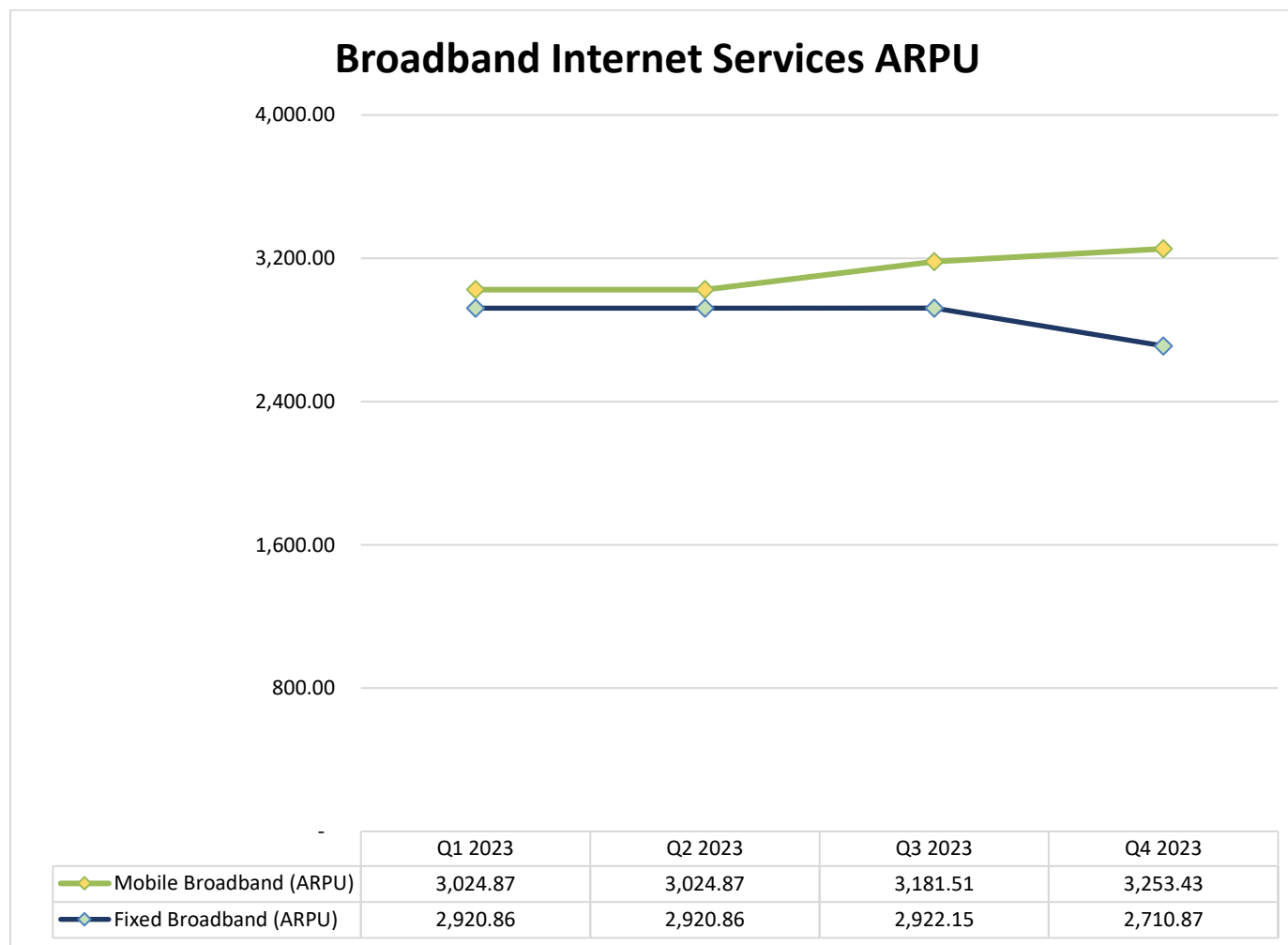


% Change: Q4 '23/Q3 '23

Fixed Broadband:
-2.96%

Mobile Broadband:
6.97%

Figure 18: Broadband Internet Services Average Revenue per User (ARPU)

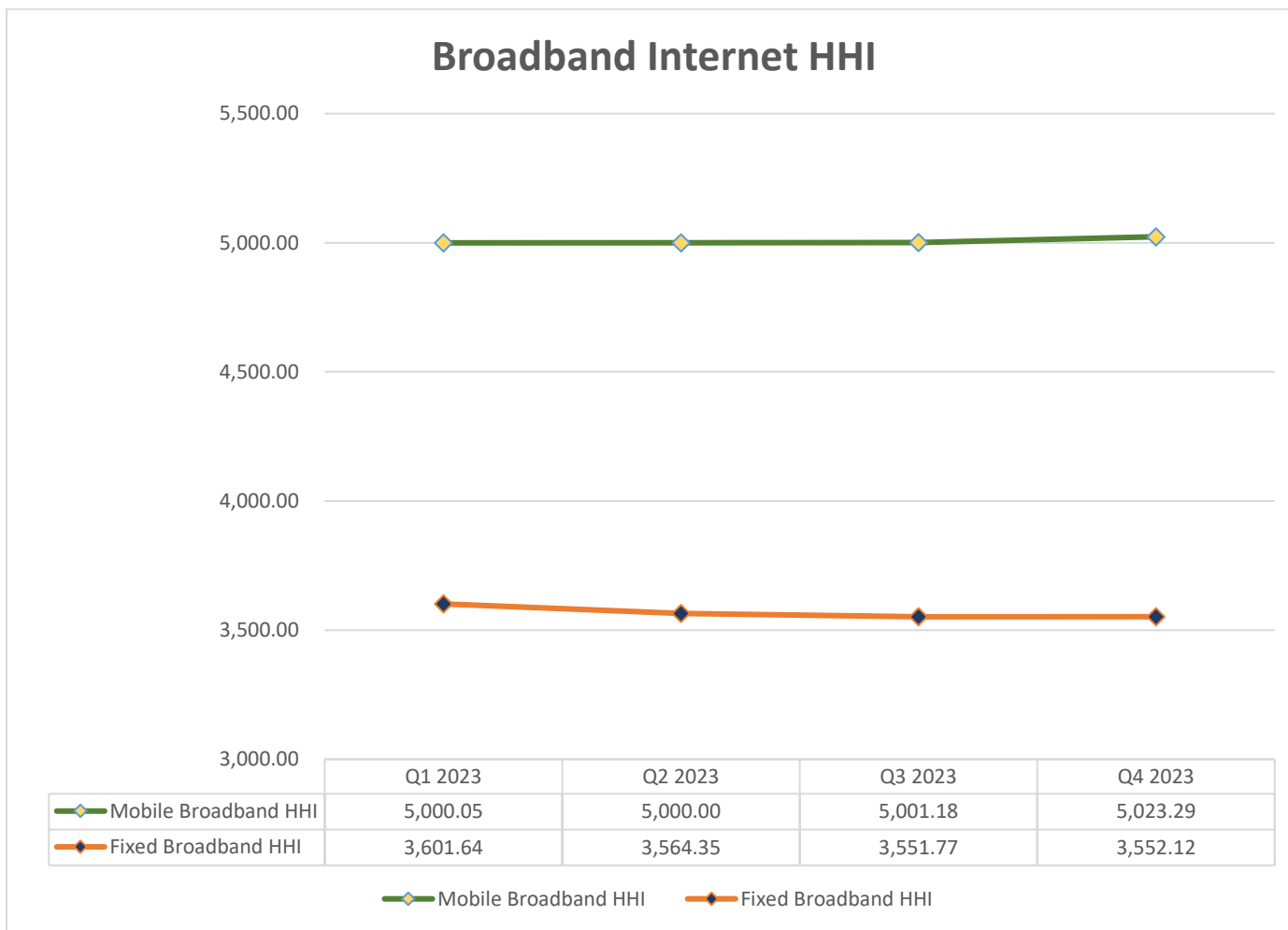


% Change: Q4 '23/Q3 '23

Fixed Broadband:
-7.23%

Mobile Broadband:
2.26%

Figure 19: Broadband Internet Services Herfindahl-Hirschman Index (HHI)



% Change: Q4 '23/Q3 '23

Fixed Broadband:
0.01%

Mobile Broadband:
0.44%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Fixed Voice Subscription Penetration Rate	16.12%	16.37%	16.58%	16.78%
Mobile Voice Subscription Penetration Rate	116.66%	116.57%	117.20%	119.92%
Fixed Broadband Subscription Penetration Rate	15.59%	15.92%	16.13%	16.39%
Mobile Broadband Subscription Penetration Rate	69.36%	69.23%	69.86%	73.56%
Total Broadband Subscription Penetration Rate	84.94%	85.15%	85.99%	89.95%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Fixed Voice HHI	3,993	3,981	3,977	3,996
Mobile Voice HHI	5,177	5,172	5,174	5,179
Fixed Broadband HHI	3,602	3,564	3,552	3,552
Mobile Broadband HHI	5,000	5,000	5,001	5,023

¹ Calculated using population year-end 2019 data from the Statistical Institute of Jamaica: 2,734,092.

² Calculated using subscription data.

Appendix

Fixed Voice Data	Q1 2023	Q2 2023	Q3 2023	Q4 2023	% Change Q4 '23/Q3 '23
Total Subscriptions ('000)	440.86	447.70	453.20	458.72	1.22
Gross Domestic Revenue (J\$' million)	1,298.64	1,256.95	1,192.89	1,155.70	-3.12
Gross Domestic ARPU	2,945.70	2,807.54	2,632.16	2,519.38	-4.28
Gross International Revenue (J' million)	131.51	127.95	105.52	121.86	15.48
International ARPU	298.31	285.79	232.84	265.64	14.09

Mobile Voice Data	Q1 2023	Q2 2023	Q3 2023	Q4 2023	% Change Q4 '23/Q3 '23
Total Subscriptions ('000)	3,189.70	3,187.14	3,204.48	3,278.80	2.32
Gross Domestic Revenue (J\$' million)	9,831.87	9,824.73	10,722.17	10,711.67	-0.10
Gross Domestic ARPU	3,082.38	3,082.61	3,345.99	3,266.95	-2.36
Gross International Revenue (J' million)	534.57	500.03	516.37	547.09	5.95
International ARPU	167.59	156.89	161.14	166.86	3.55

Internet Data	Q1 2023	Q2 2023	Q3 2023	Q4 2023	% Change Q4 '23/Q3 '23
Total Subscriptions ('000)	2,322.38	2,328.00	2,351.03	2,459.38	4.61
Fixed Broadband (≥256K)	426.12	435.131	440.97	448.226	1.65
Mobile Broadband	1,896.27	1892.867	1910.057	2011.156	5.29
Total Revenue (J\$' million)	13,651.12	13,841.65	14,349.87	14,668.47	2.22

Penetration Rate	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Fixed Voice Subscription Penetration Rate	16.12%	16.37%	16.58%	16.78%
Mobile Voice Subscription Penetration Rate	116.66%	116.57%	117.20%	119.92%
Fixed Broadband Subscription Penetration Rate	15.59%	15.92%	16.13%	16.39%
Mobile Broadband Subscription Penetration Rate	69.36%	69.23%	69.86%	73.56%
Total Broadband Subscription Penetration Rate	84.94%	85.15%	85.99%	89.95%

Herfindahl-Hirschman Index (HHI)	Q1 2023	Q2 2023	Q3 2023	Q4 2023
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