
Office of Utilities Regulation

Telecommunications Market Information Report July - September 2024



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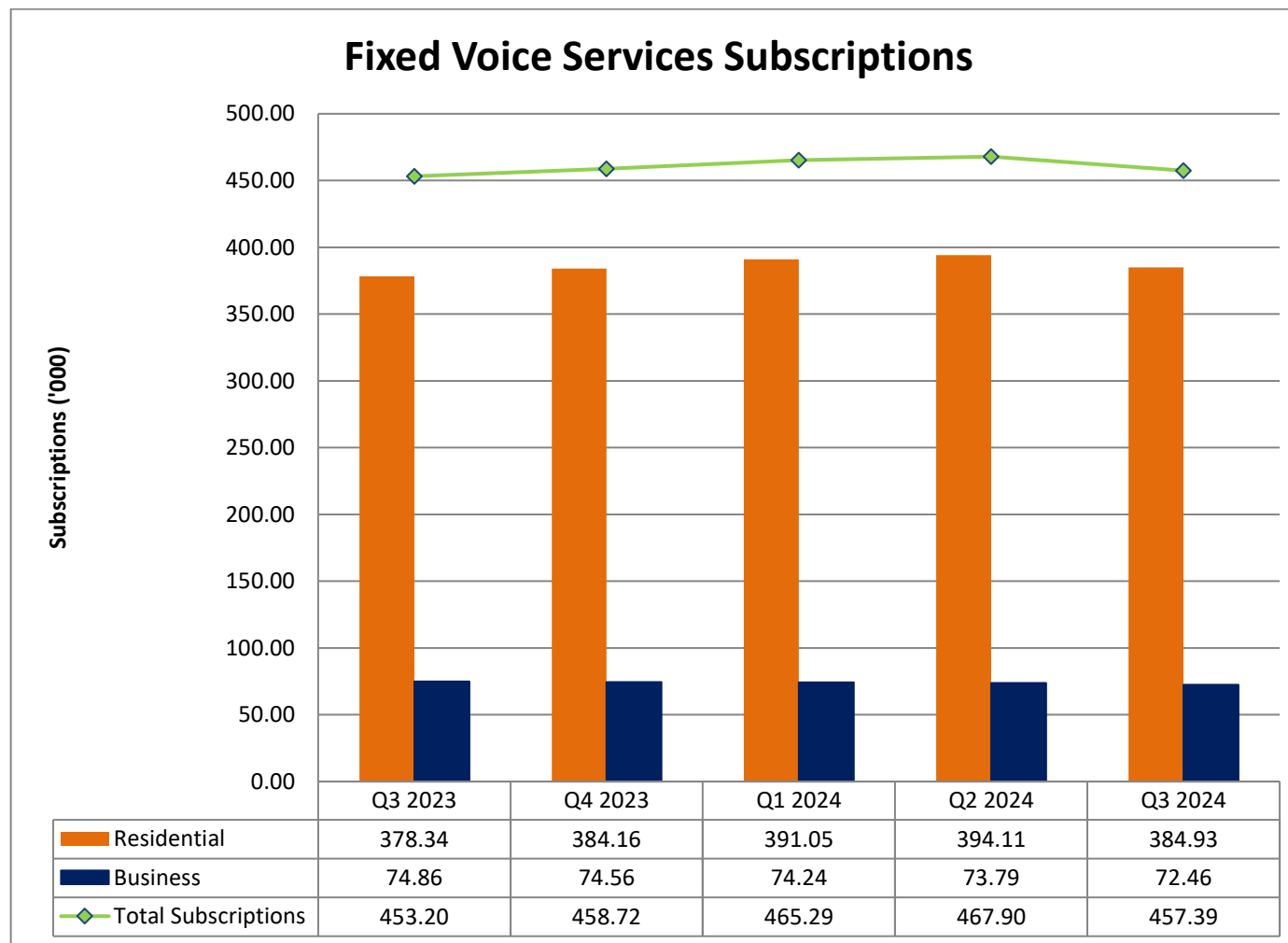
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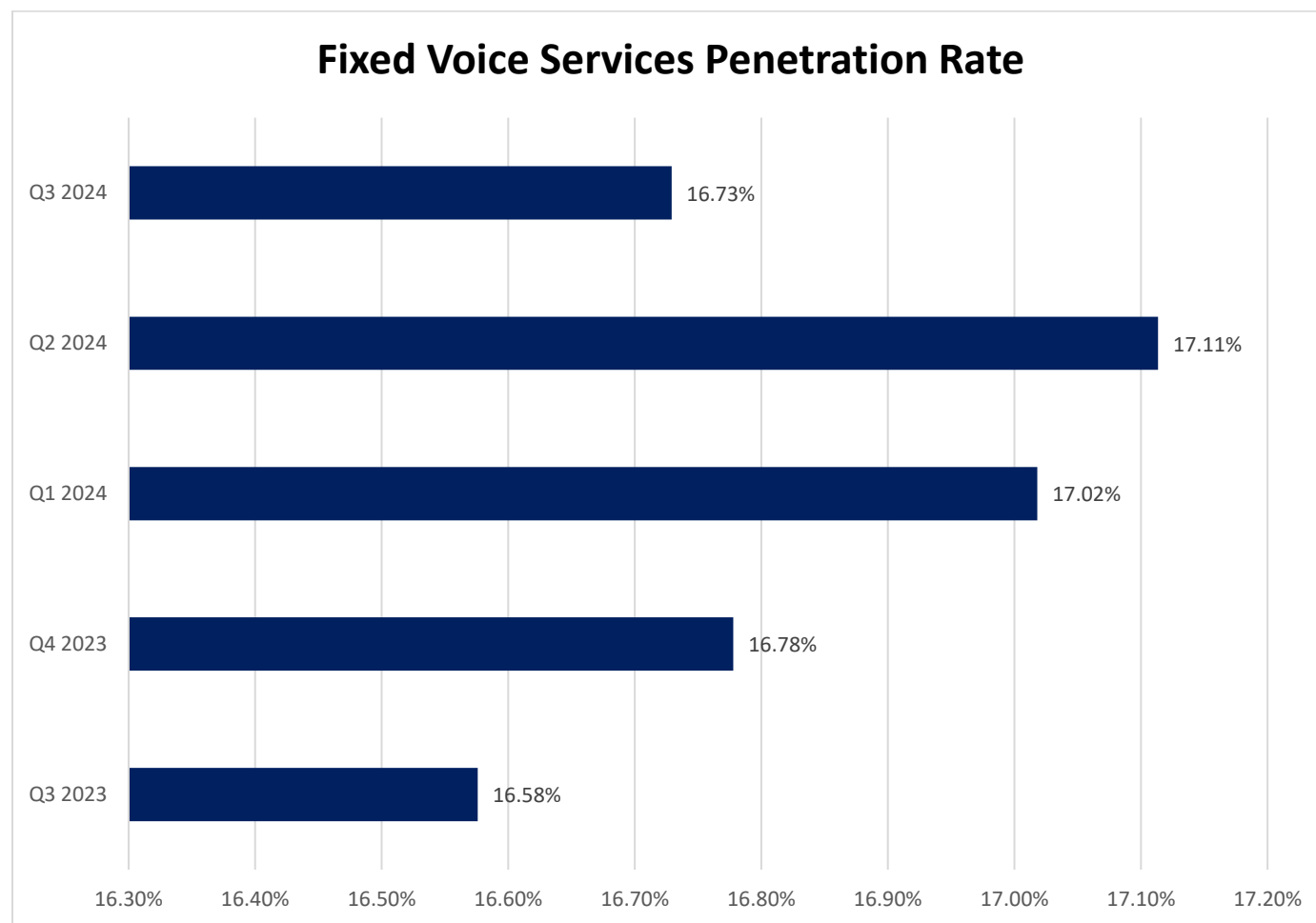
Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions



% Change: Q3 '24/Q2 '24
Total Subscriptions: -2.25%
Residential: -2.33%
Business: - 1.79%

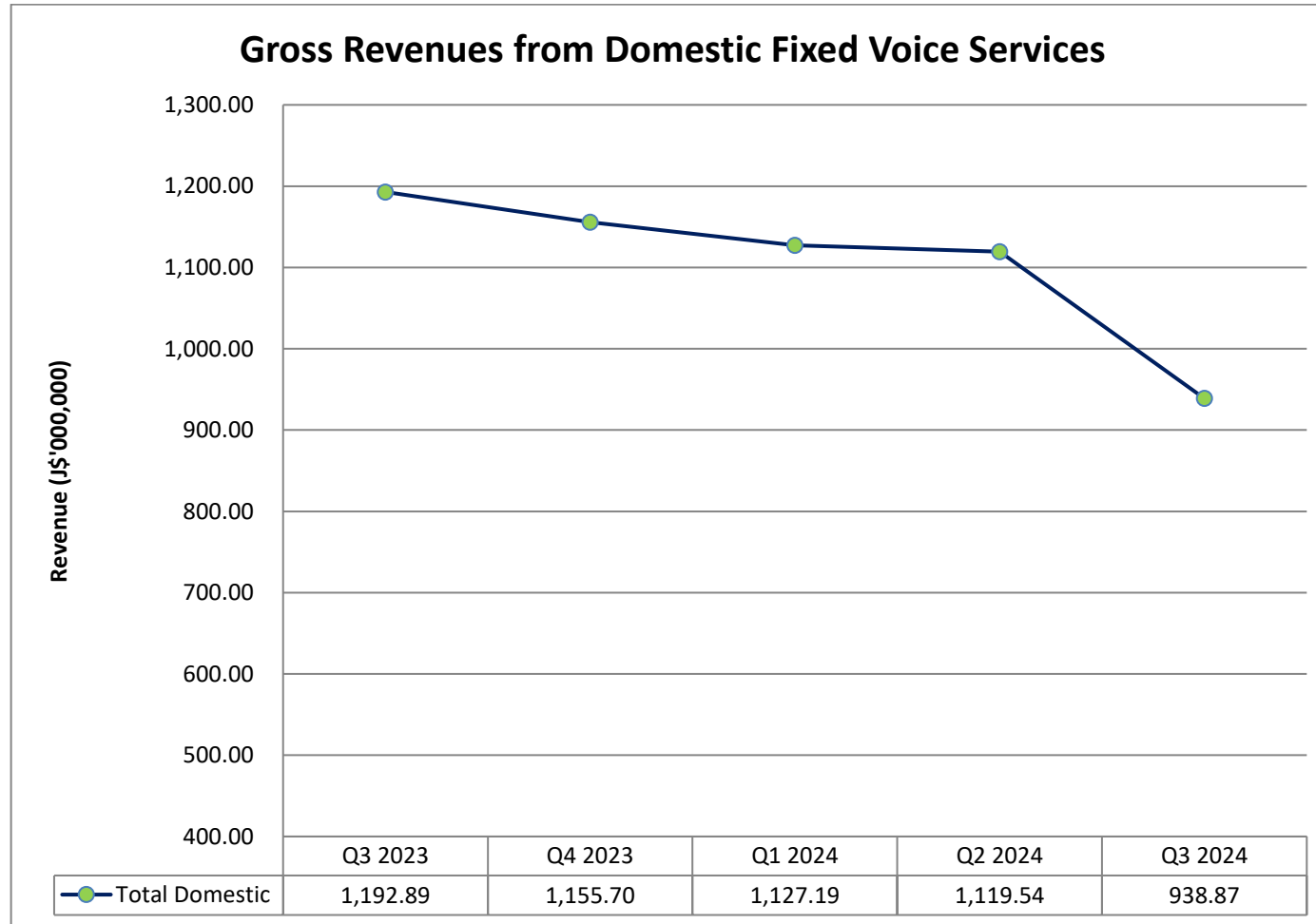
Figure 2: Fixed Voice Services Penetration Rate



% Change: Q3 '24/Q2 '24

-2.25%

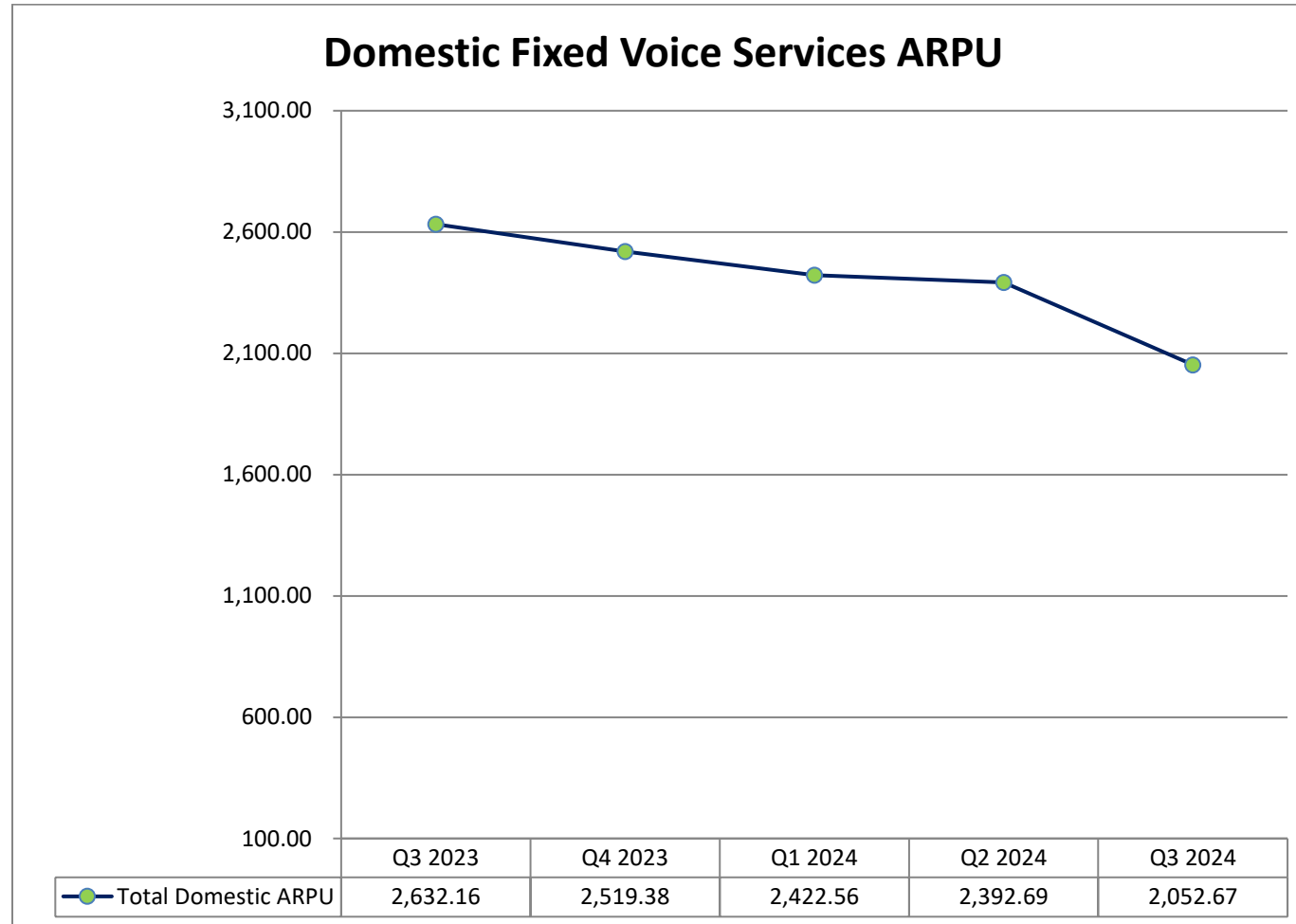
Figure 3: Gross Revenues from Domestic Fixed Voice Services



% Change Q3 '24/Q2 '24

- 16.14%

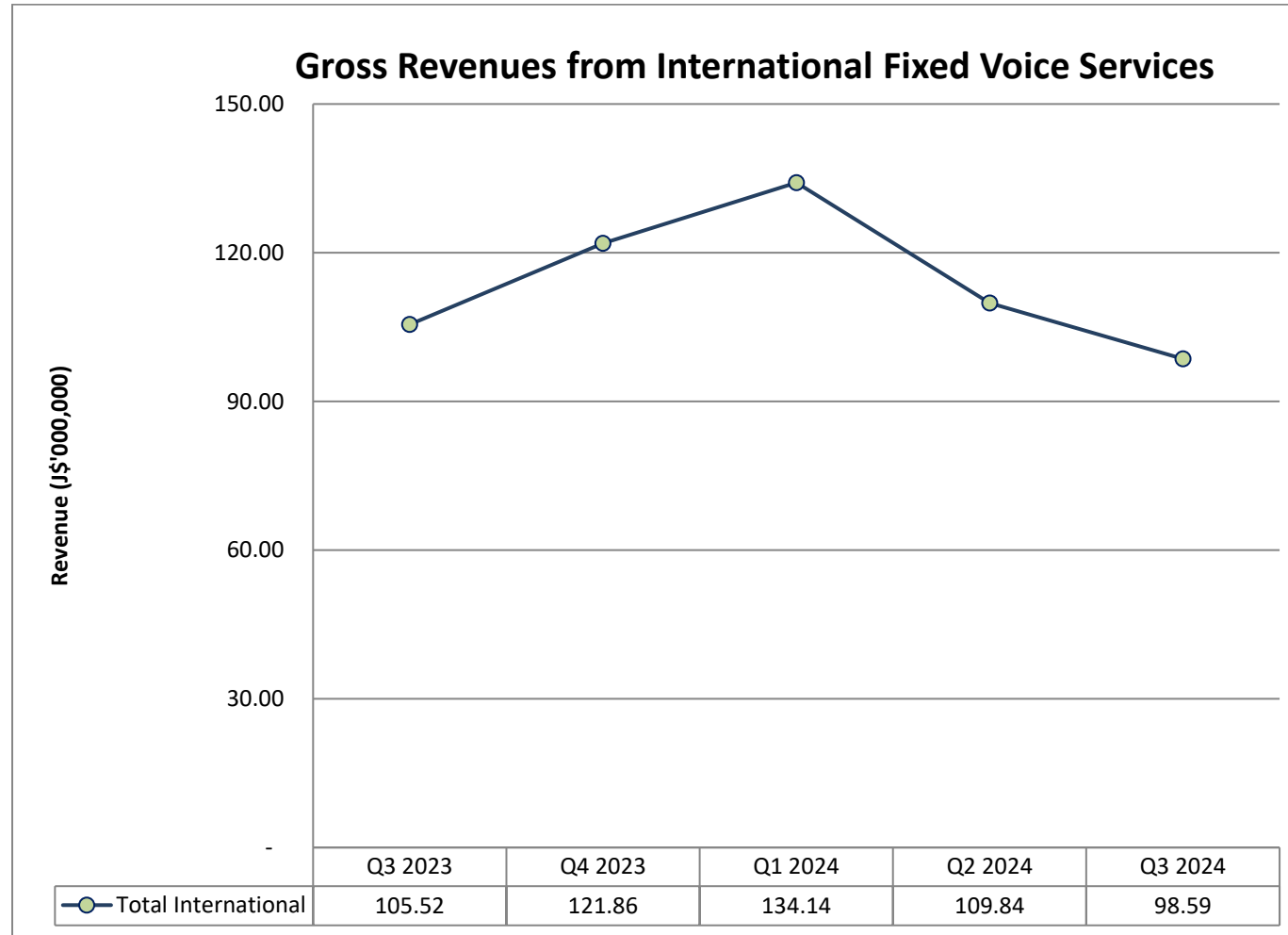
Figure 4: Domestic Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q3 '24/Q2 '24

-14.21%

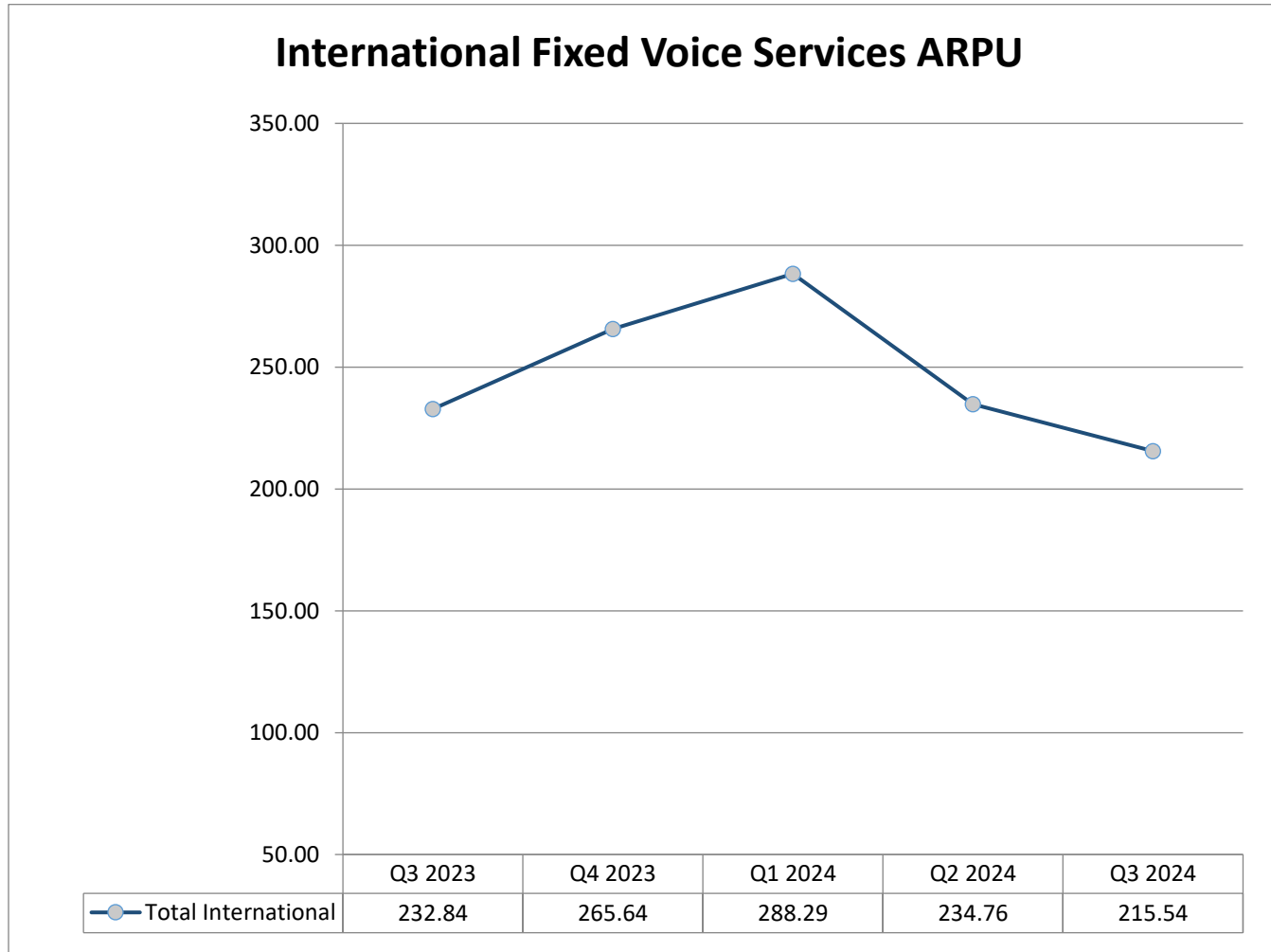
Figure 5: Gross Revenues from International Fixed Voice Services



% Change: Q3 '24/Q2 '24

-10.25%

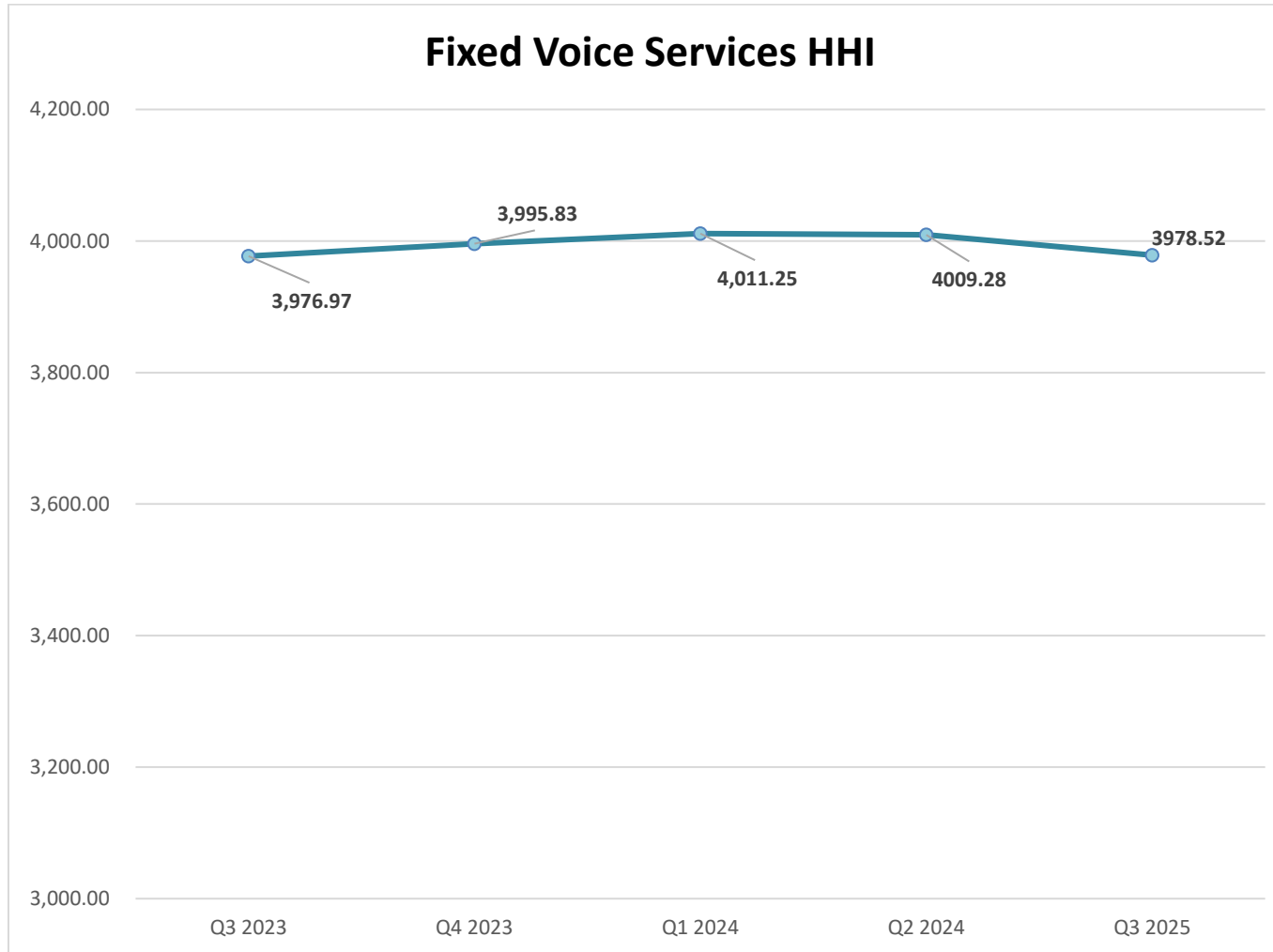
Figure 6: International Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q3 '24/Q2 '24

-8.19%

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

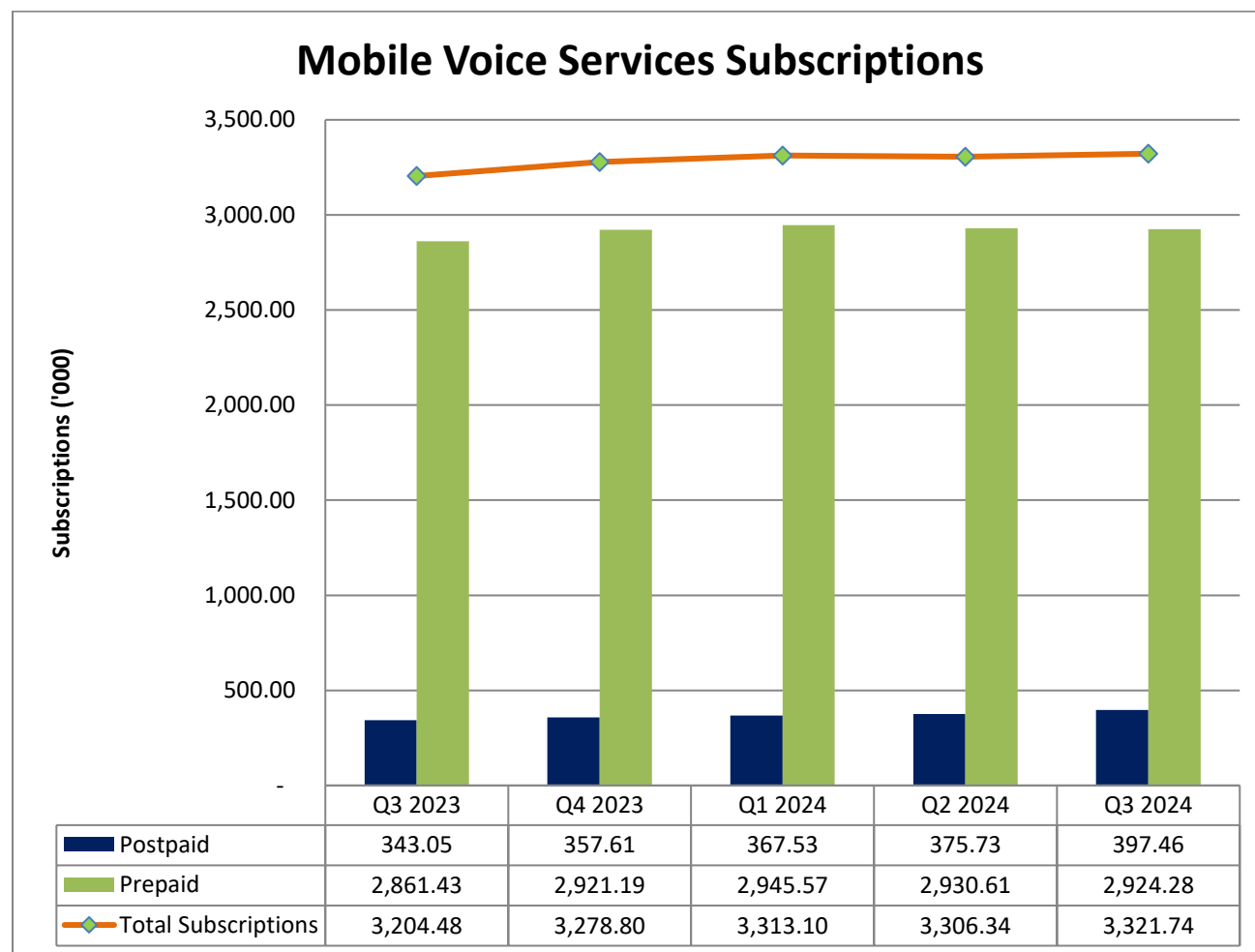


% Change: Q3 '24/Q2 '24

-0.77%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



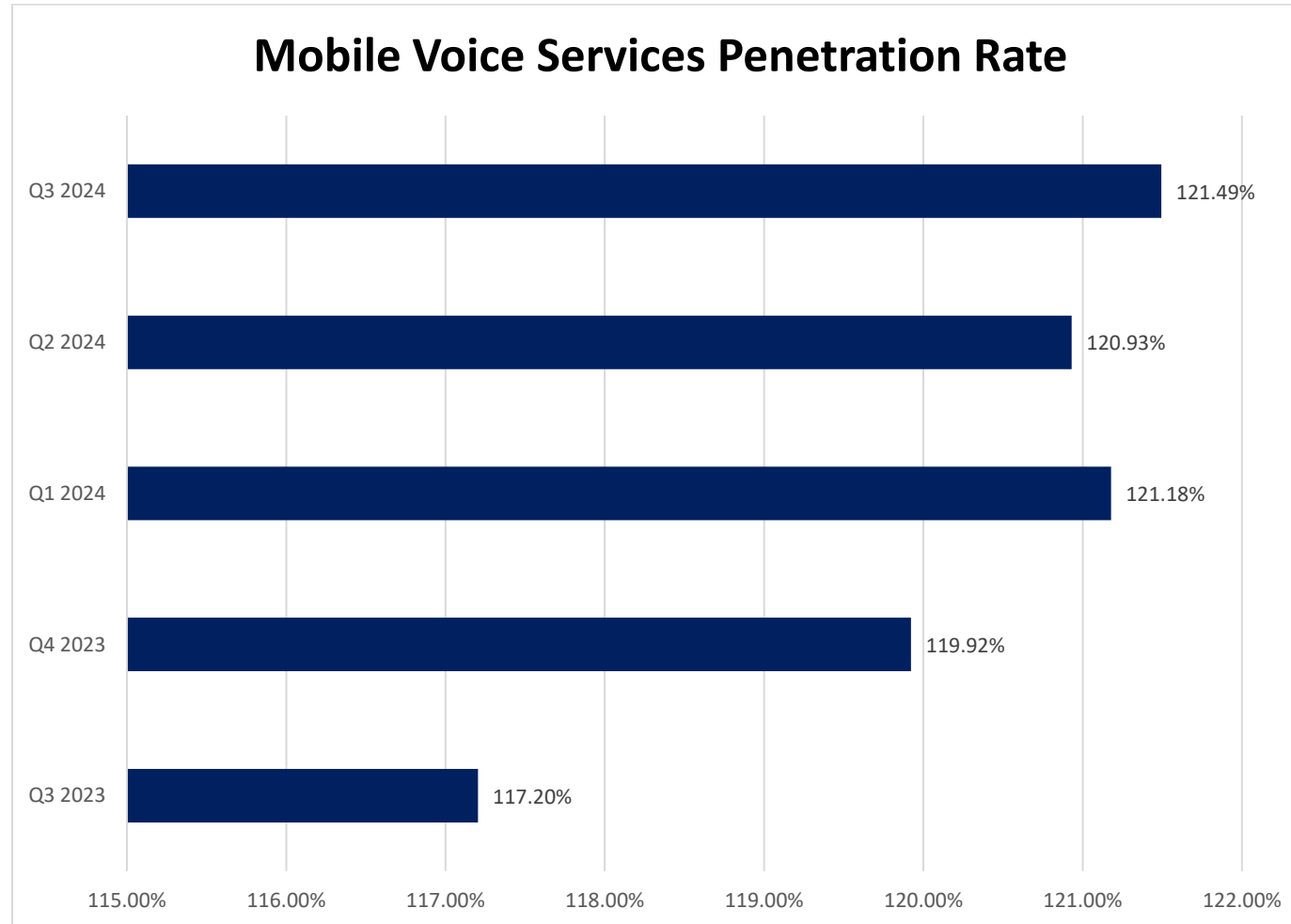
% Change: Q3 '24/Q2 '24

Total Subscriptions:
0.47%

Postpaid:
5.78%

Prepaid:
-0.22%

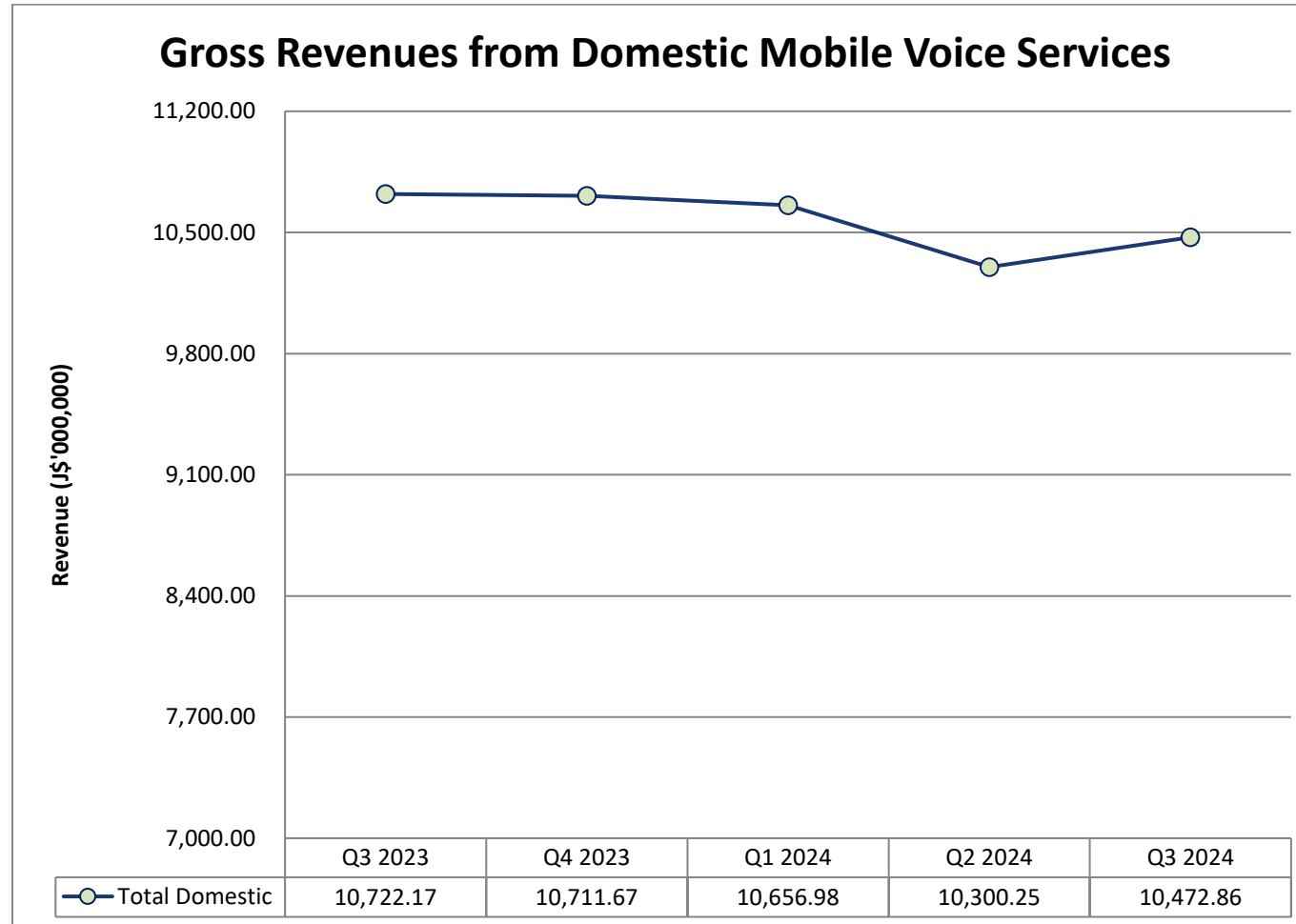
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q3 '24/Q2 '24

0.47%

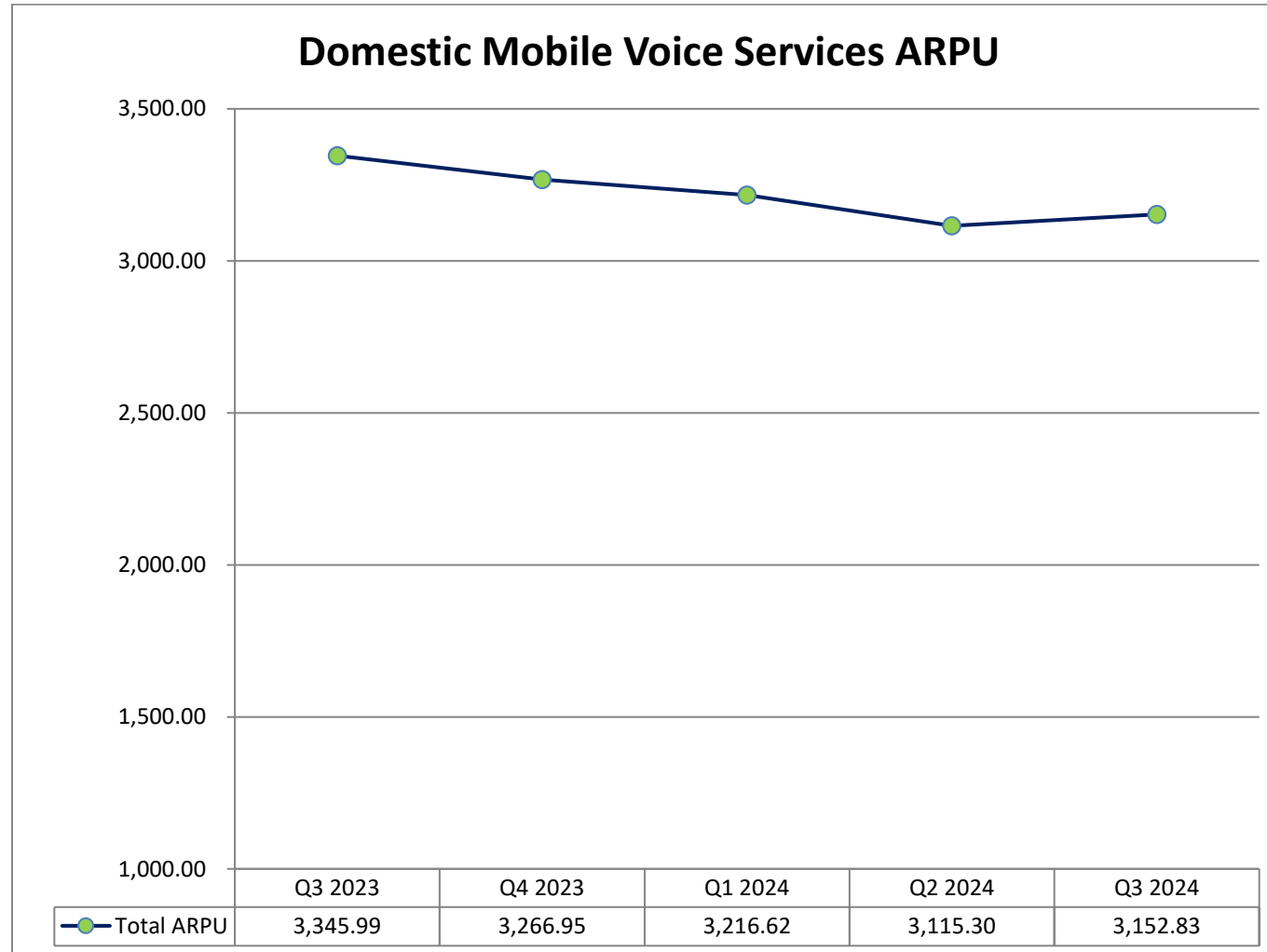
Figure 10: Gross Revenues from Domestic Mobile Voice Services



% Change: Q3 '24/Q2 '24

1.68%

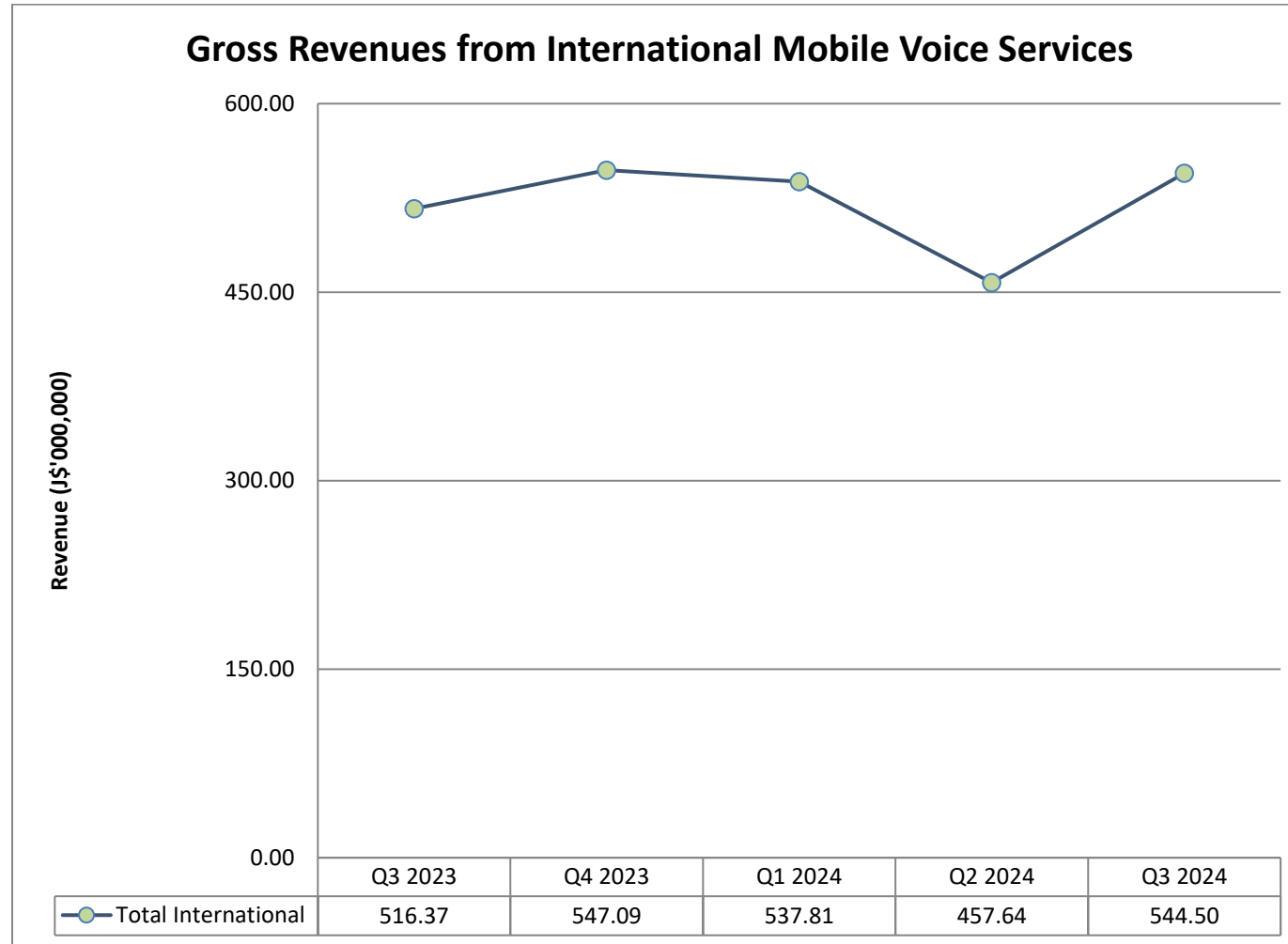
Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q3 '24/Q2 '24

1.20%

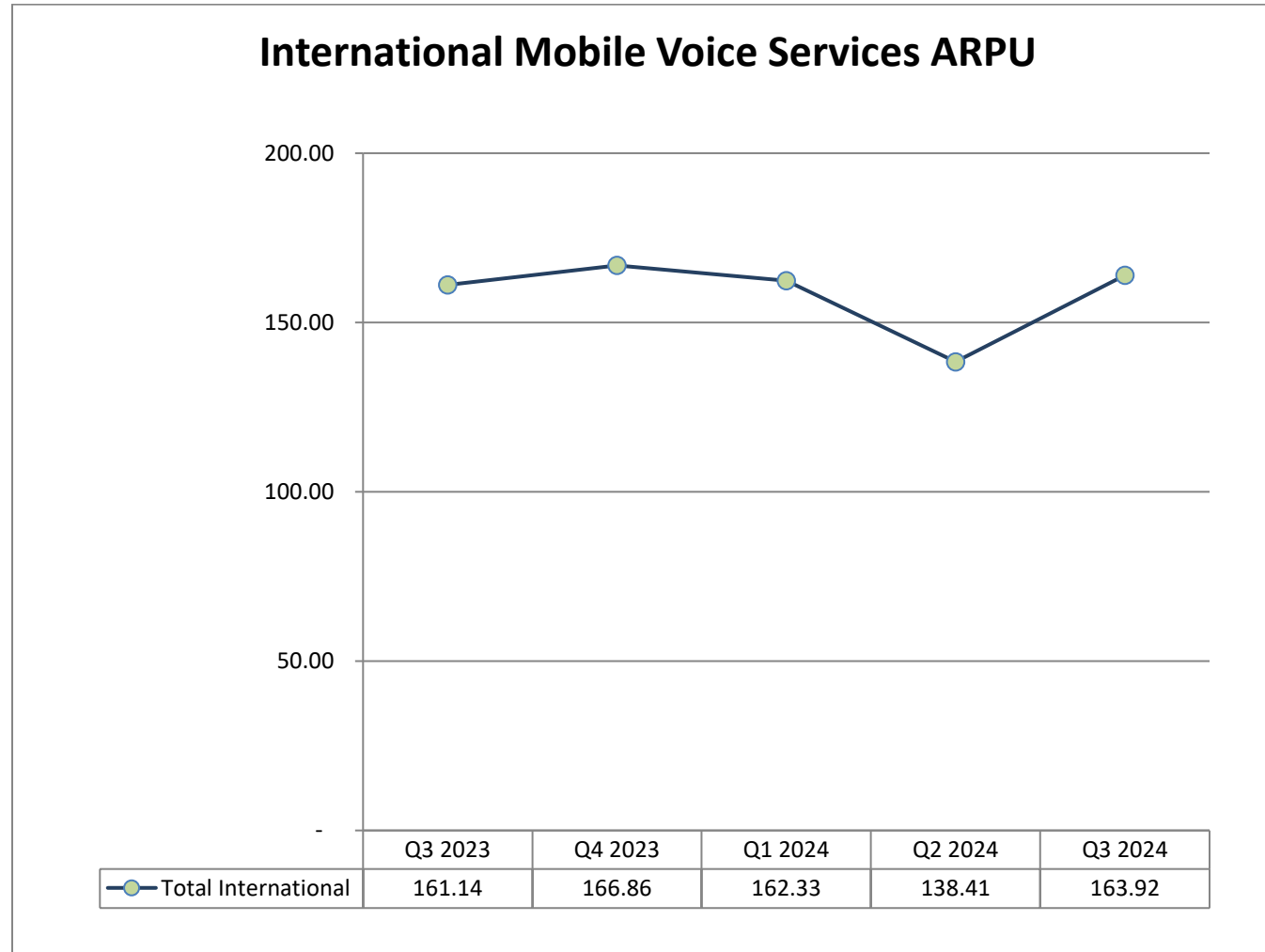
Figure 12: Gross Revenues from International Mobile Voice Services



% Change: Q3 '24/Q2 '24

18.98%

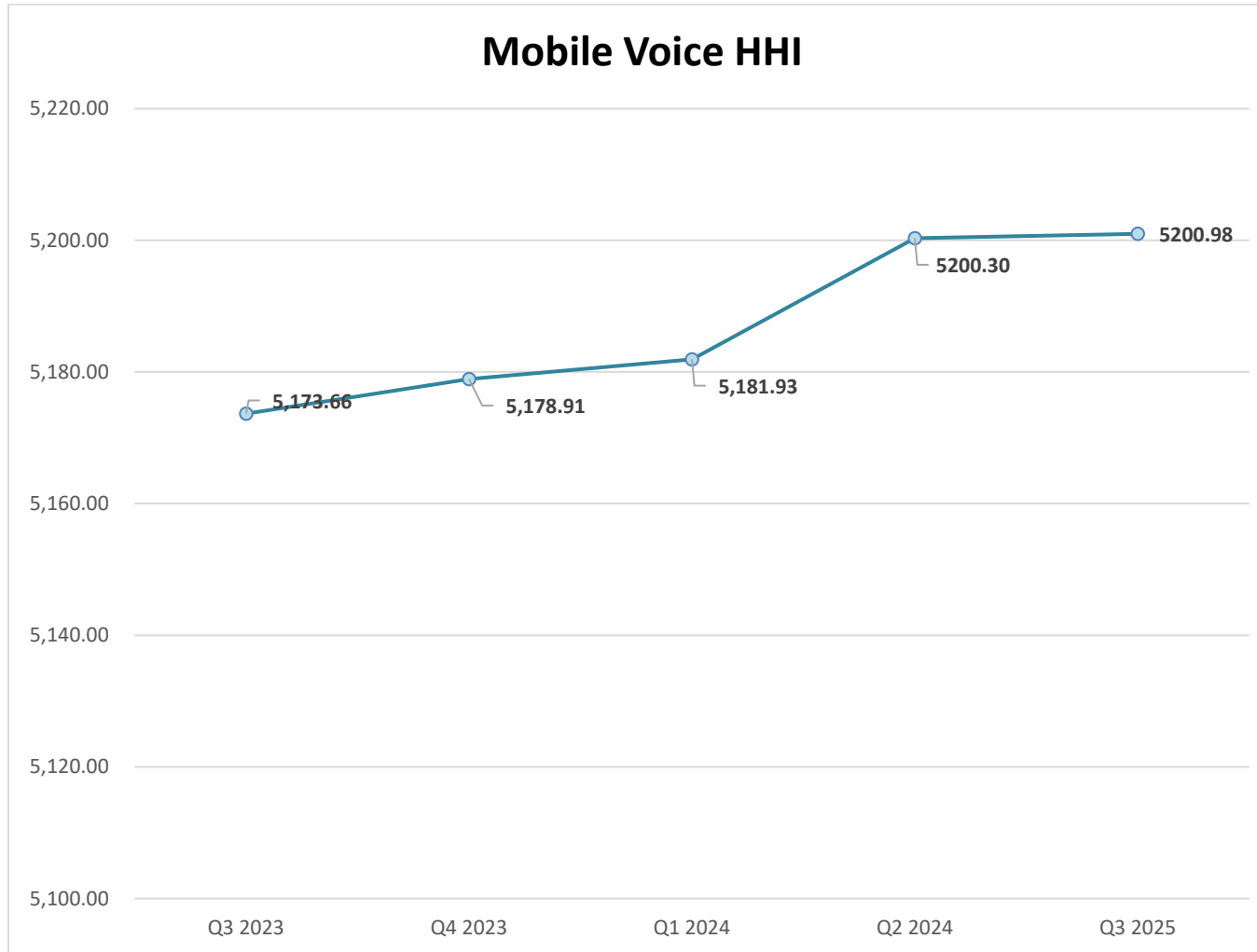
Figure 13: International Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q3 '24/Q2 '24

18.43%

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

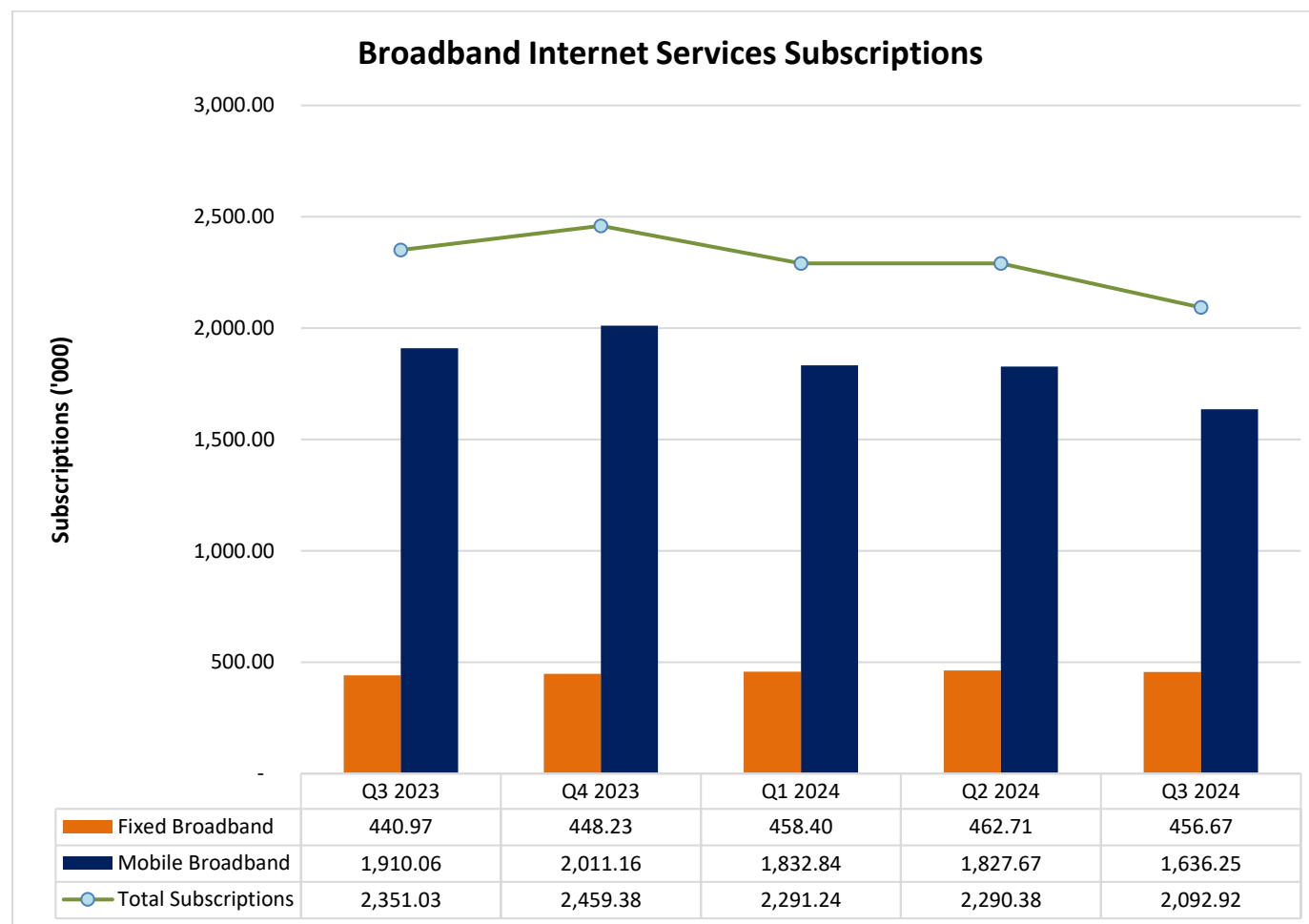


% Change: Q3 '24/Q2 '24

0.01%

Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions



% Change: Q3 '24/Q2 '24

Total Subscriptions:

-8.62%

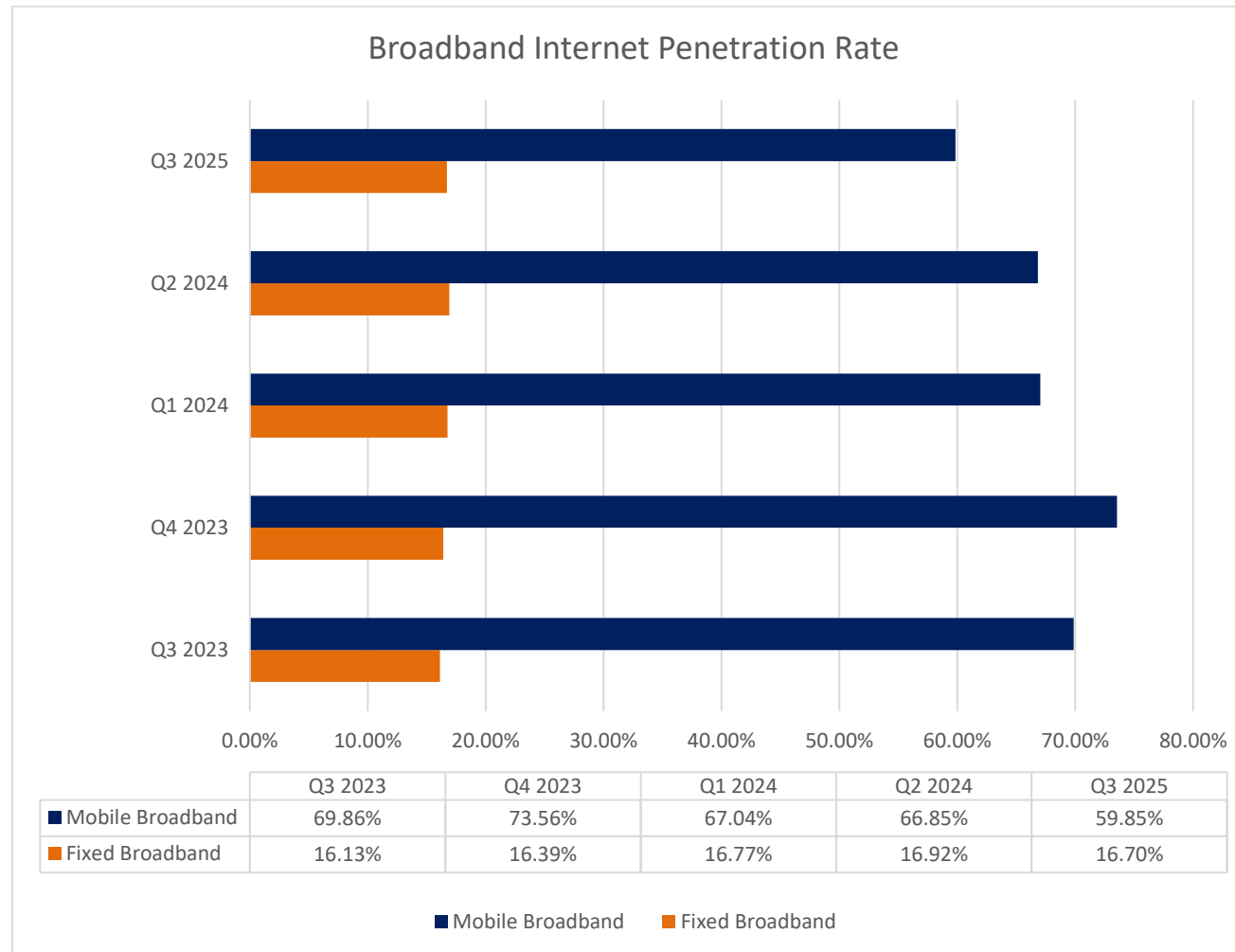
Fixed Broadband:

-1.31%

Mobile Broadband:

-10.47%

Figure 16: Broadband Internet Penetration Rate



% Change: Q3 '24/Q2 '24

Fixed Broadband:

-1.31%

Mobile Broadband:

-10.47%

Figure 17: Broadband Internet Revenue Distribution

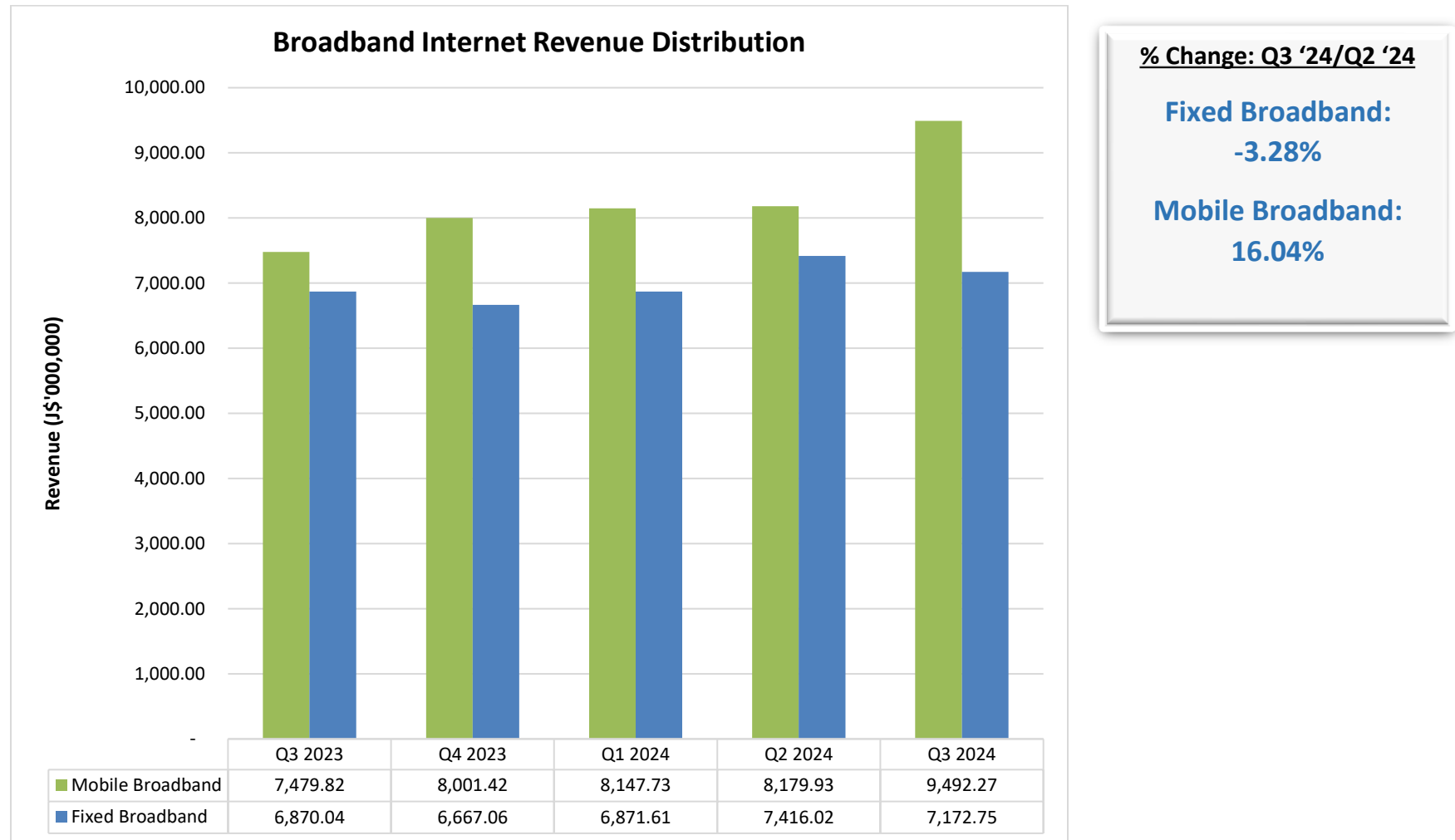
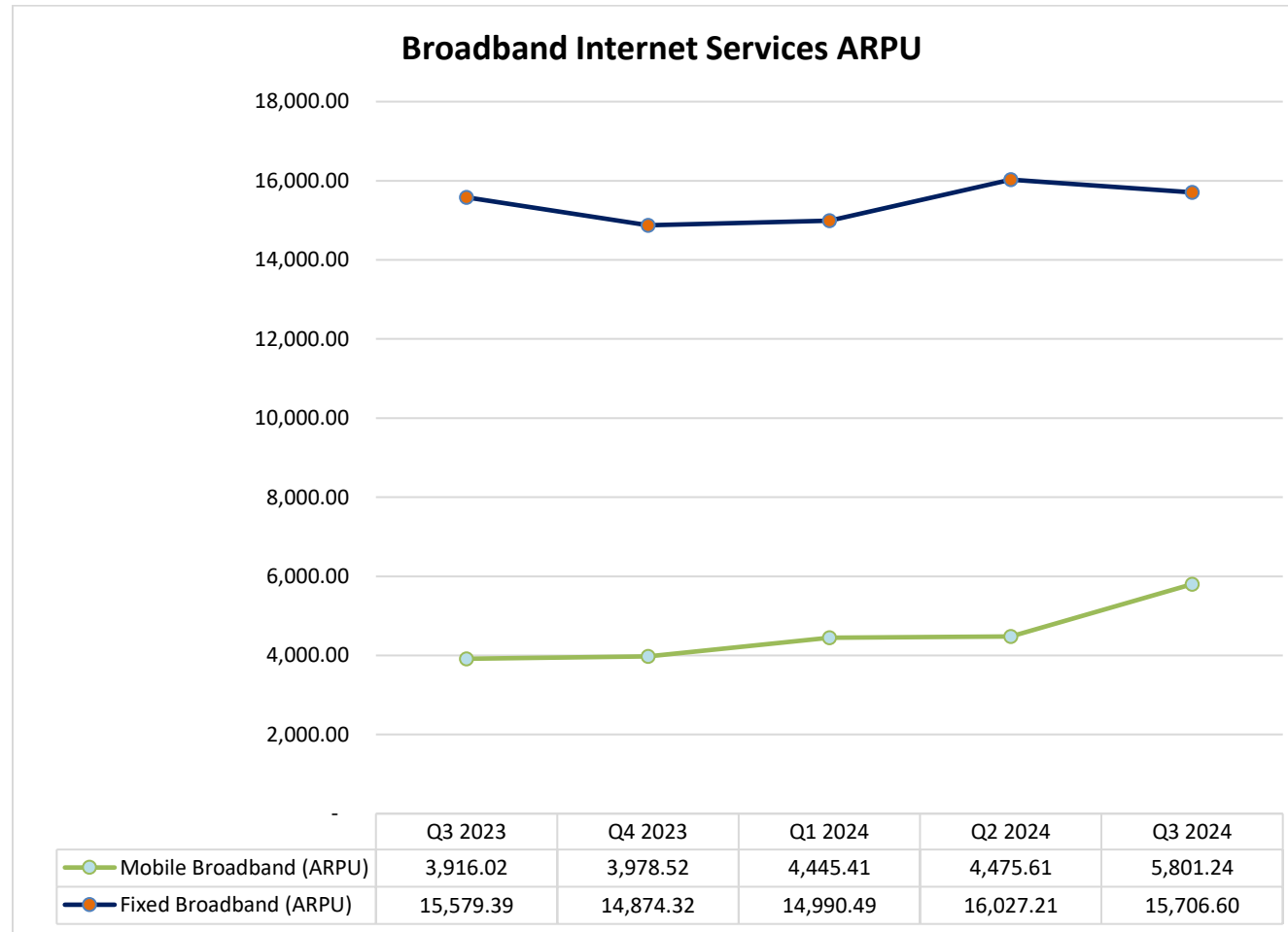


Figure 18: Broadband Internet Services Average Revenue per User (ARPU)

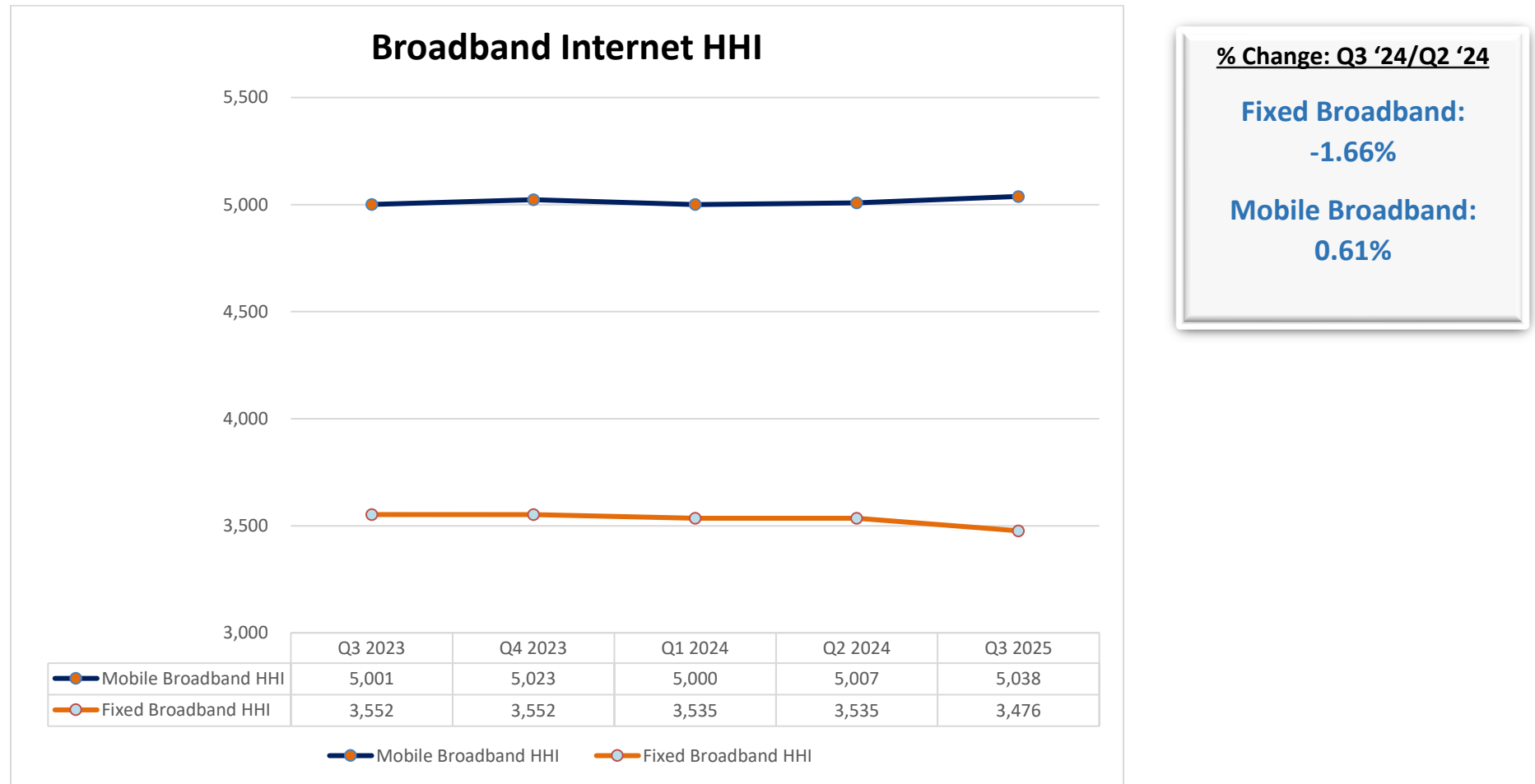


% Change: Q3 '24/Q2 '24

Fixed Broadband:
-2.00%

Mobile Broadband:
29.62%

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



Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024
Fixed Voice Subscription Penetration Rate	16.58%	16.78%	17.02%	17.11%	16.73%
Mobile Voice Subscription Penetration Rate	117.20%	119.92%	121.18%	120.93%	121.49%
Fixed Broadband Subscription Penetration Rate	16.13%	16.39%	16.77%	16.92%	16.70%
Mobile Broadband Subscription Penetration Rate	69.86%	73.56%	67.04%	66.85%	59.85%
Total Broadband Subscription Penetration Rate	85.99%	89.95%	83.80%	83.77%	76.55%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2025
Fixed Voice HHI	3,977	3,996	4,011	4009	3979
Mobile Voice HHI	5,174	5,179	5,182	5200	5201
Fixed Broadband HHI	3,552	3,552	3,535	3,535	3,476
Mobile Broadband HHI	5,001	5,023	5,000	5,007	5,038

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 Services	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	% Change Q3 '24/Q2 '24	% Change Q3 '24/Q3 '23
Total Subscriptions ('000)	453.20	458.72	465.29	467.90	457.39	-2.25	0.92
Gross Domestic Revenue (J\$' million)	1,192.89	1,155.70	1,127.19	1,119.54	938.87	-16.14	-21.29
Gross Domestic ARPU	2,632.16	2,519.38	2,422.56	2,392.69	2,052.67	-14.21	-22.02
Gross International Revenue (J\$' million)	105.52	121.86	134.14	109.84	98.59	-10.25	-6.57
International ARPU	232.84	265.64	288.29	234.76	215.54	-8.19	-7.43

Mobile Voice Services	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	% Change Q3 '24/Q2 '24	% Change Q3 '24/Q3 '23
Total Subscriptions ('000)	3,204.48	3,278.80	3,313.10	3,306.34	3,321.74	0.47	3.66
Gross Domestic Revenue (J\$' million)	10,722.17	10,711.67	10,656.98	10,300.25	10,472.86	1.68	-2.33
Gross Domestic ARPU	3,345.99	3,266.95	3,216.62	3,115.30	3,152.83	1.20	-5.77
Gross International Revenue (J\$' million)	516.37	547.09	537.81	457.64	544.50	18.98	5.45
International ARPU	161.14	166.86	162.33	138.41	163.92	18.43	1.72

Internet Services	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	% Change Q3 '23/Q2 '24	% Change Q3 '24/Q3 '23
Total Subscriptions ('000)	2,351.03	2,459.38	2,291.24	2,290.38	2,092.92	-8.62	-10.98
Fixed Broadband	440.97	448.23	458.40	462.71	456.67	-1.31	3.56
Mobile Broadband	1,910.06	2,011.16	1,832.84	1,827.67	1,636.25	-10.47	-14.34
Total Revenue (J\$' million)	14,349.87	14,668.47	15,019.34	15,595.94	16,665.02	6.85	16.13
Total ARPU	6,103.66	5,964.29	6,555.11	6,809.32	7,962.57	16.94	30.46

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