
Office of Utilities Regulation

Telecommunications Market Information Report October - December 2024



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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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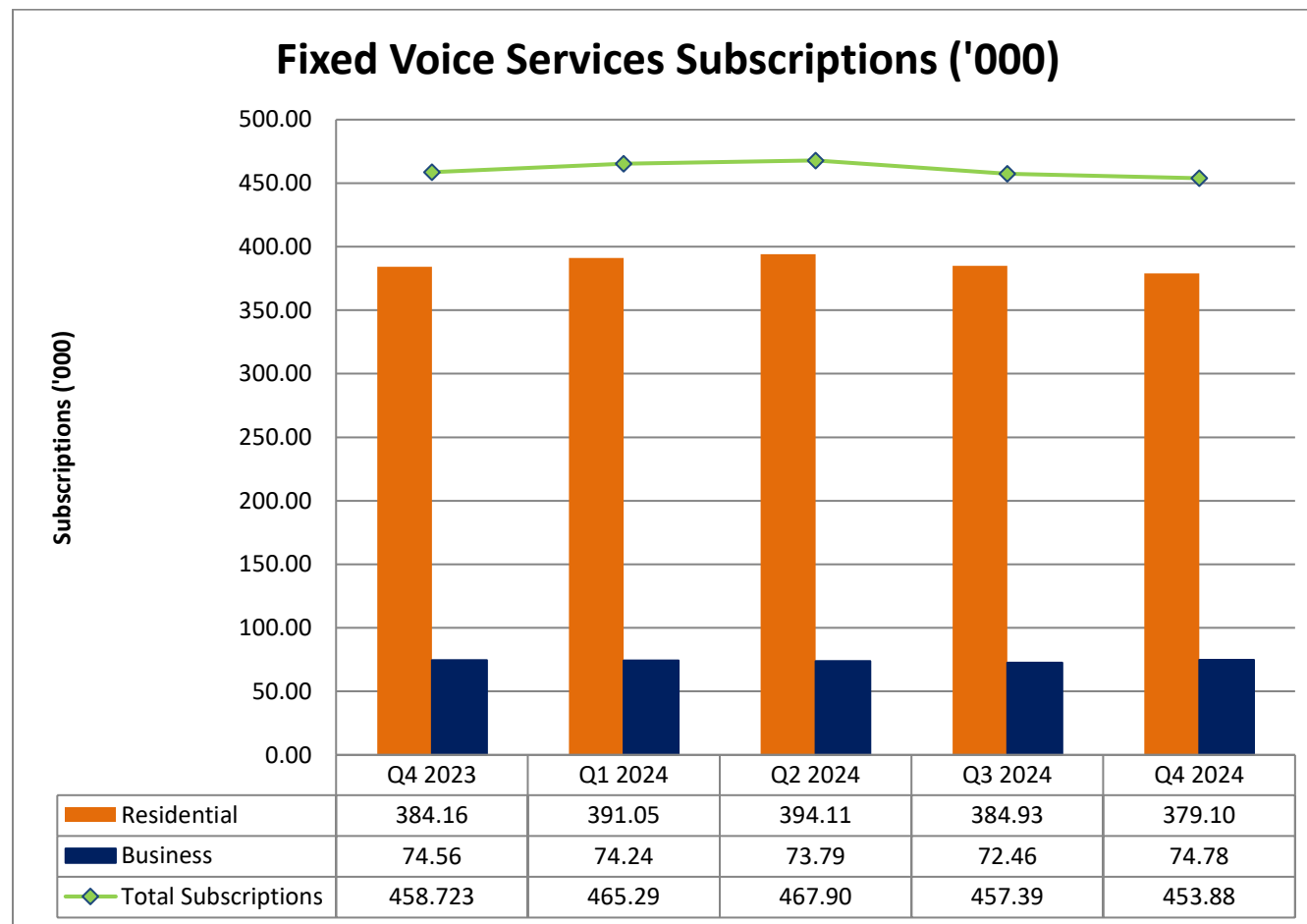
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Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions



% Change: Q4 '24/Q3 '24

Total Subscriptions:

-0.77%

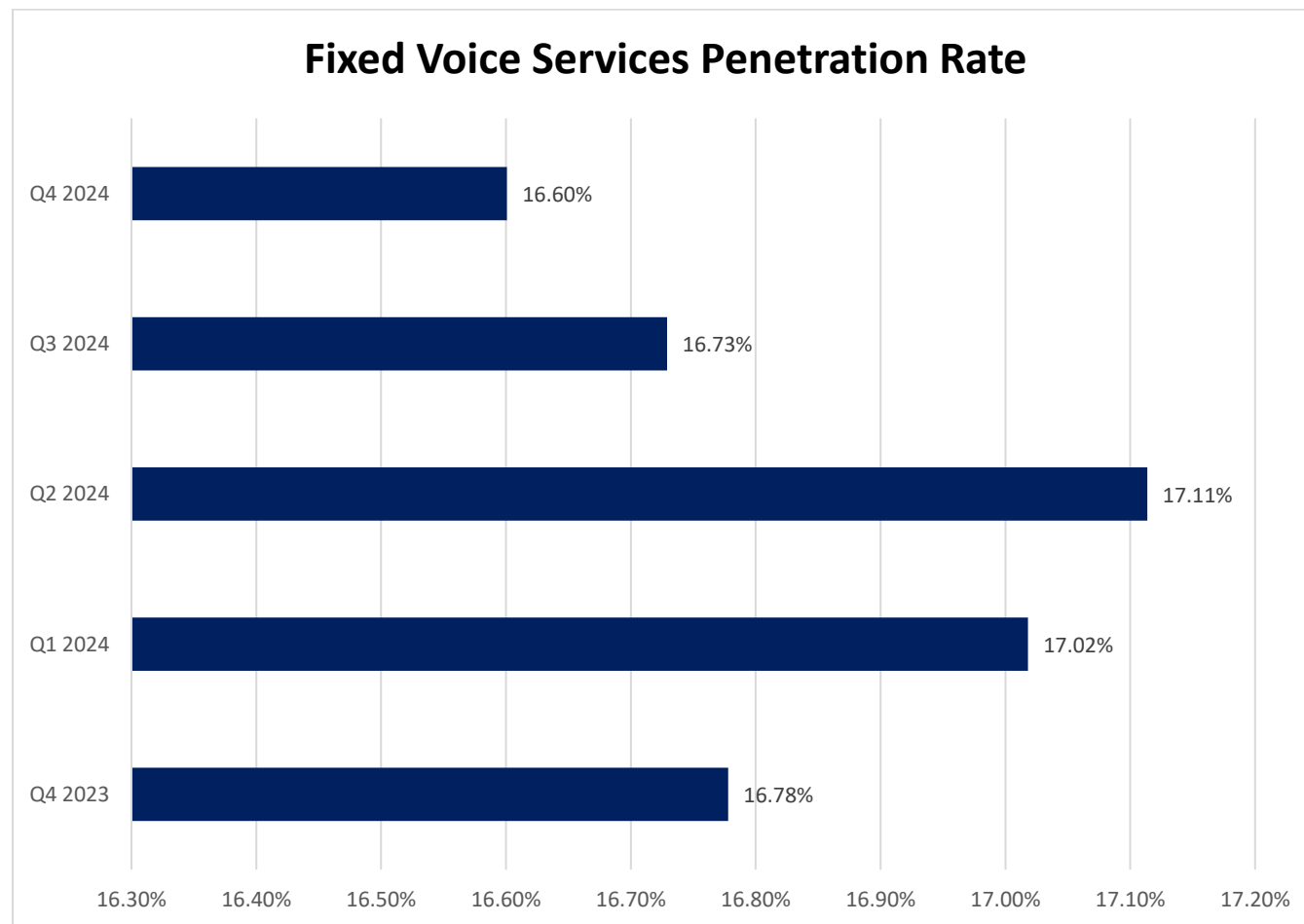
Residential:

-1.51%

Business:

3.20%

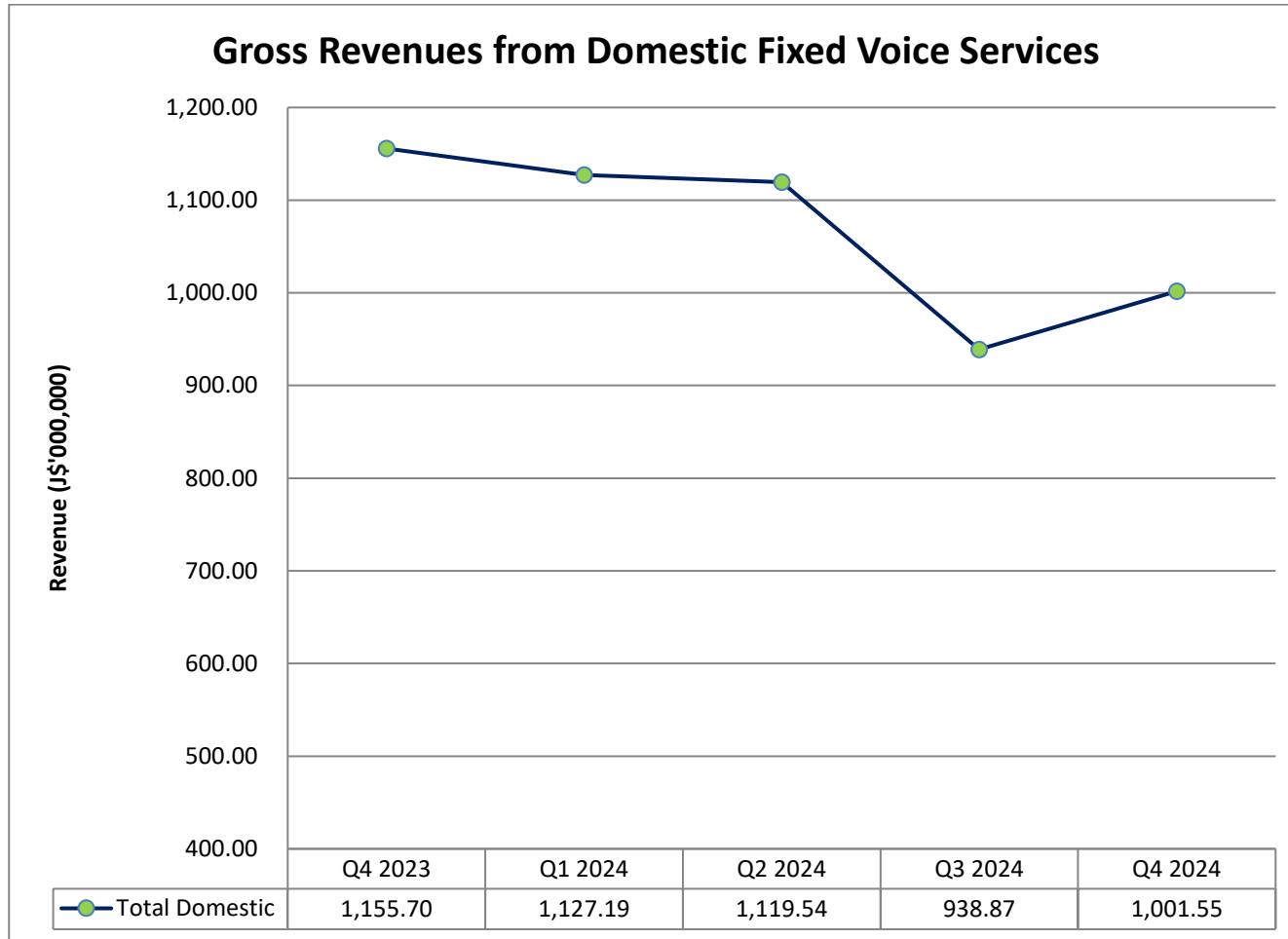
Figure 2: Fixed Voice Services Penetration Rate



% Change: Q4 '24/Q3 '24

-0.77%

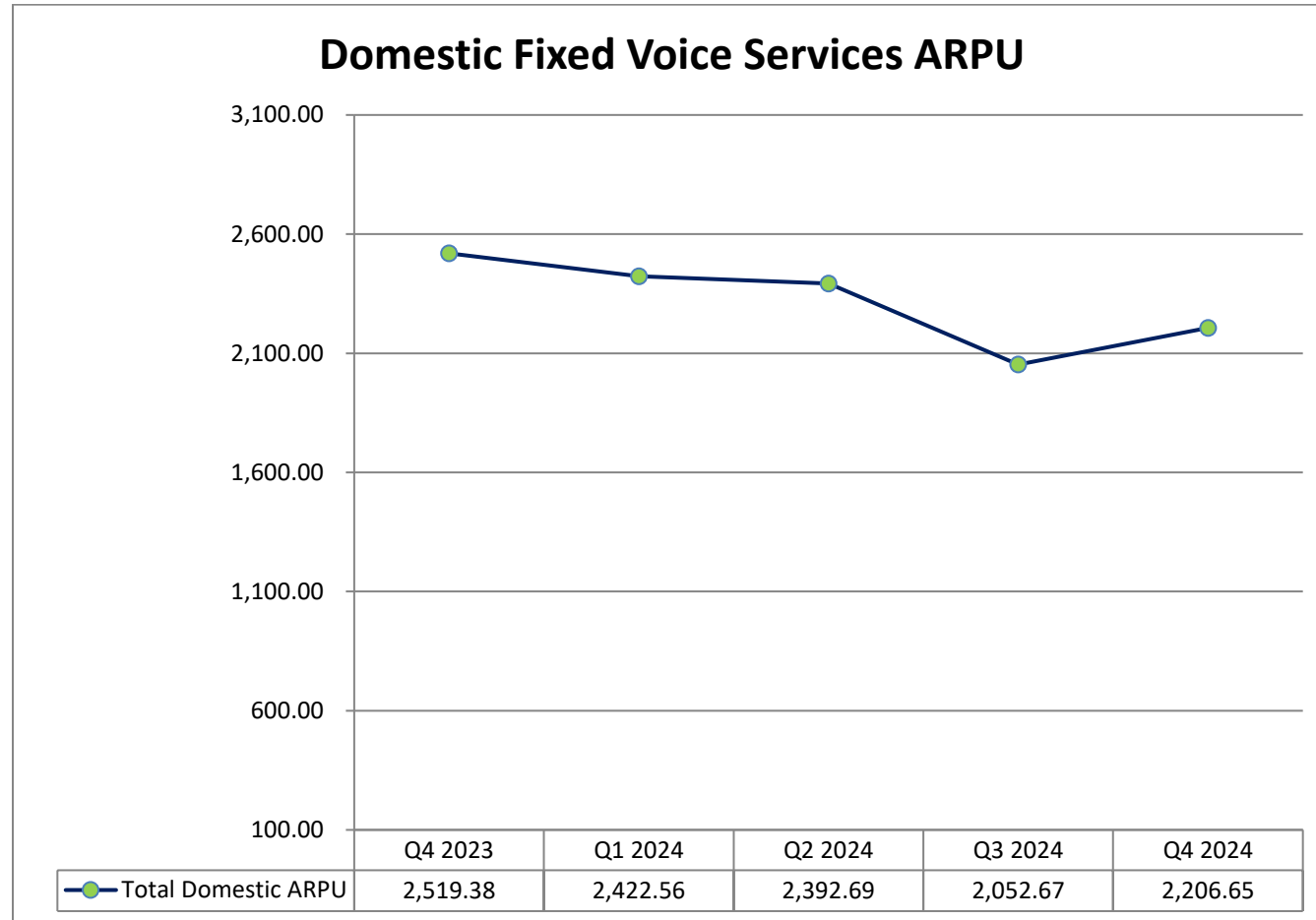
Figure 3: Gross Revenues from Domestic Fixed Voice Services



% Change Q4 '24/Q3 '24

6.68%

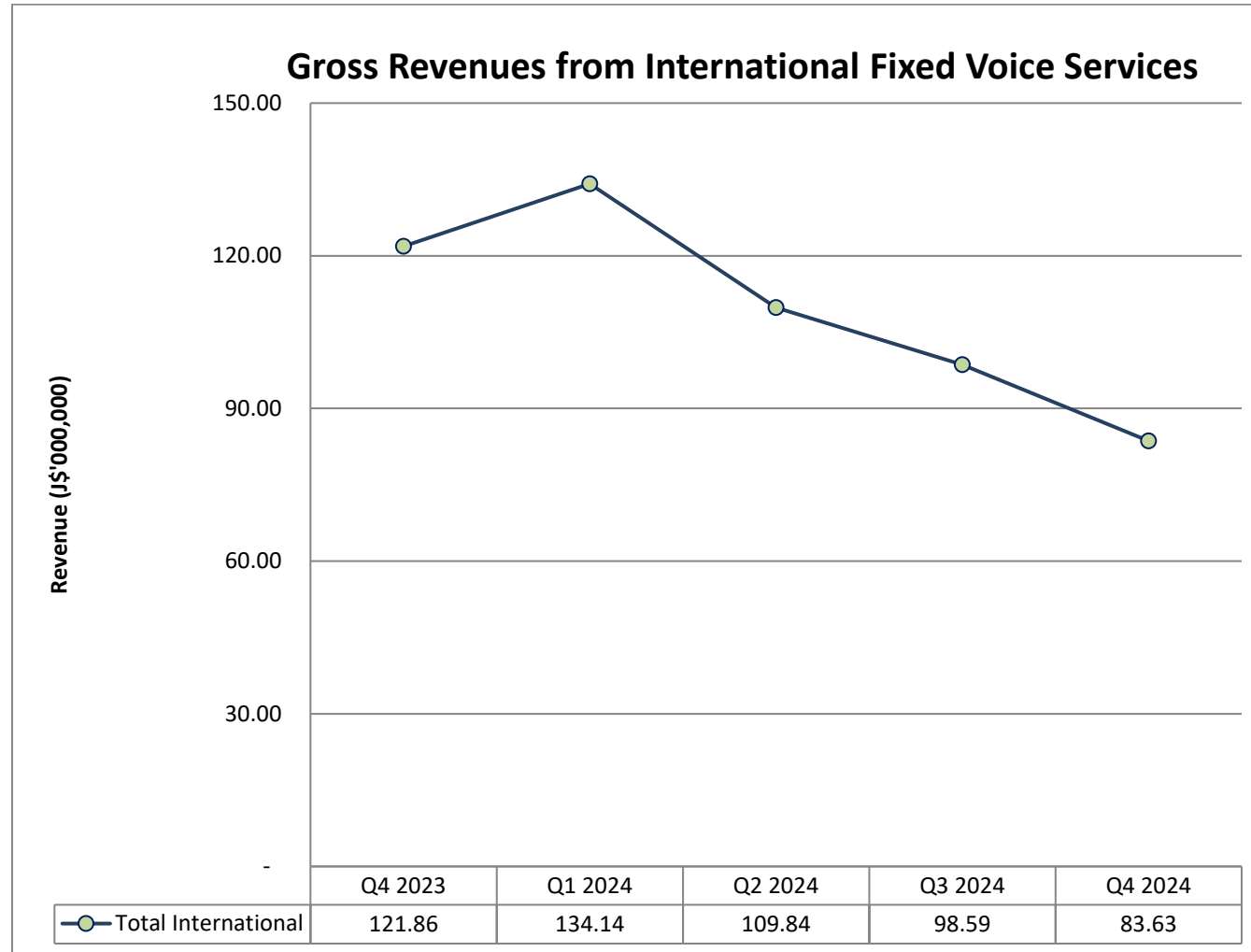
Figure 4: Domestic Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q4 '24/Q3 '24

7.50%

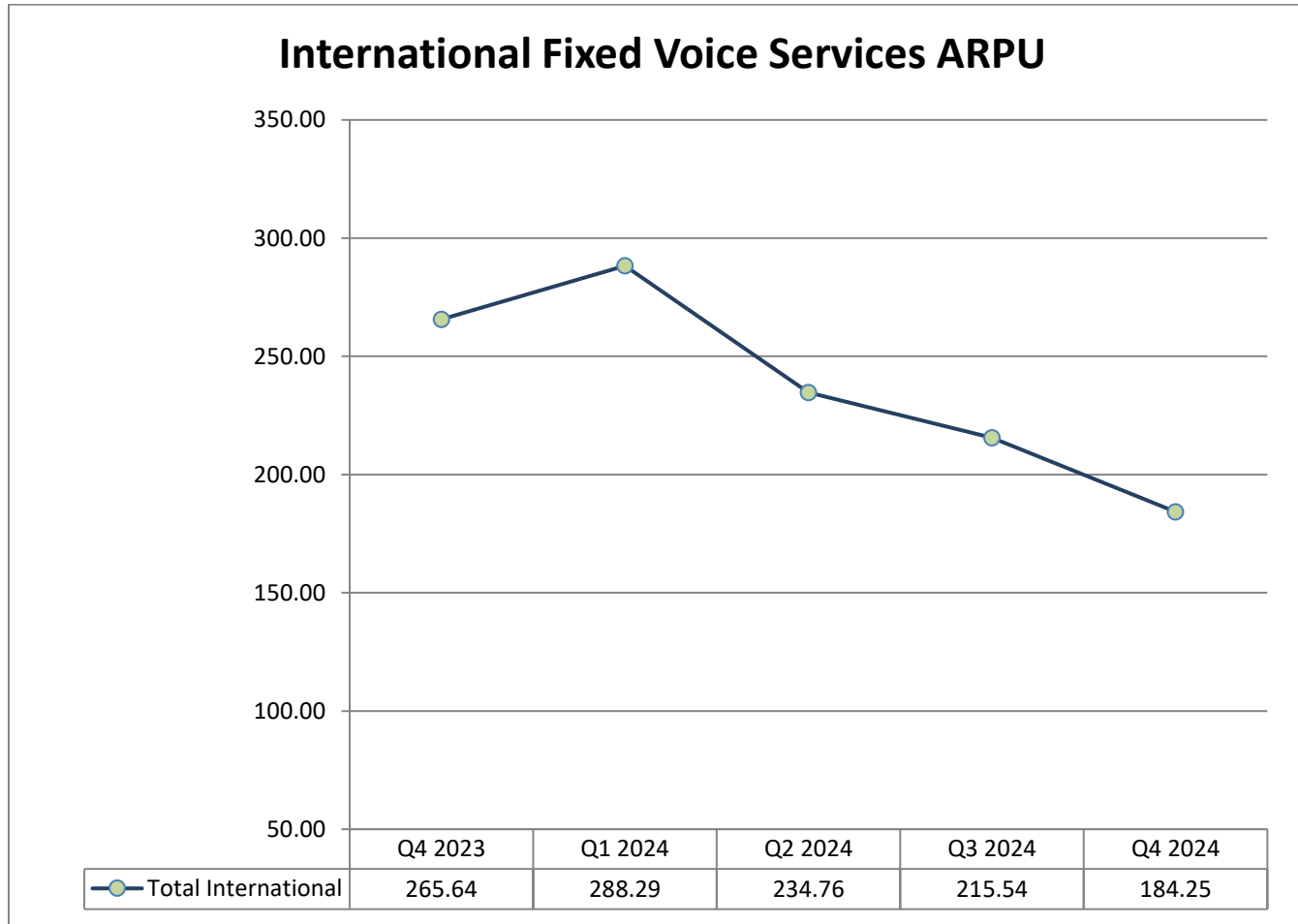
Figure 5: Gross Revenues from International Fixed Voice Services



% Change: Q4 '24/Q3 '24

-15.17%

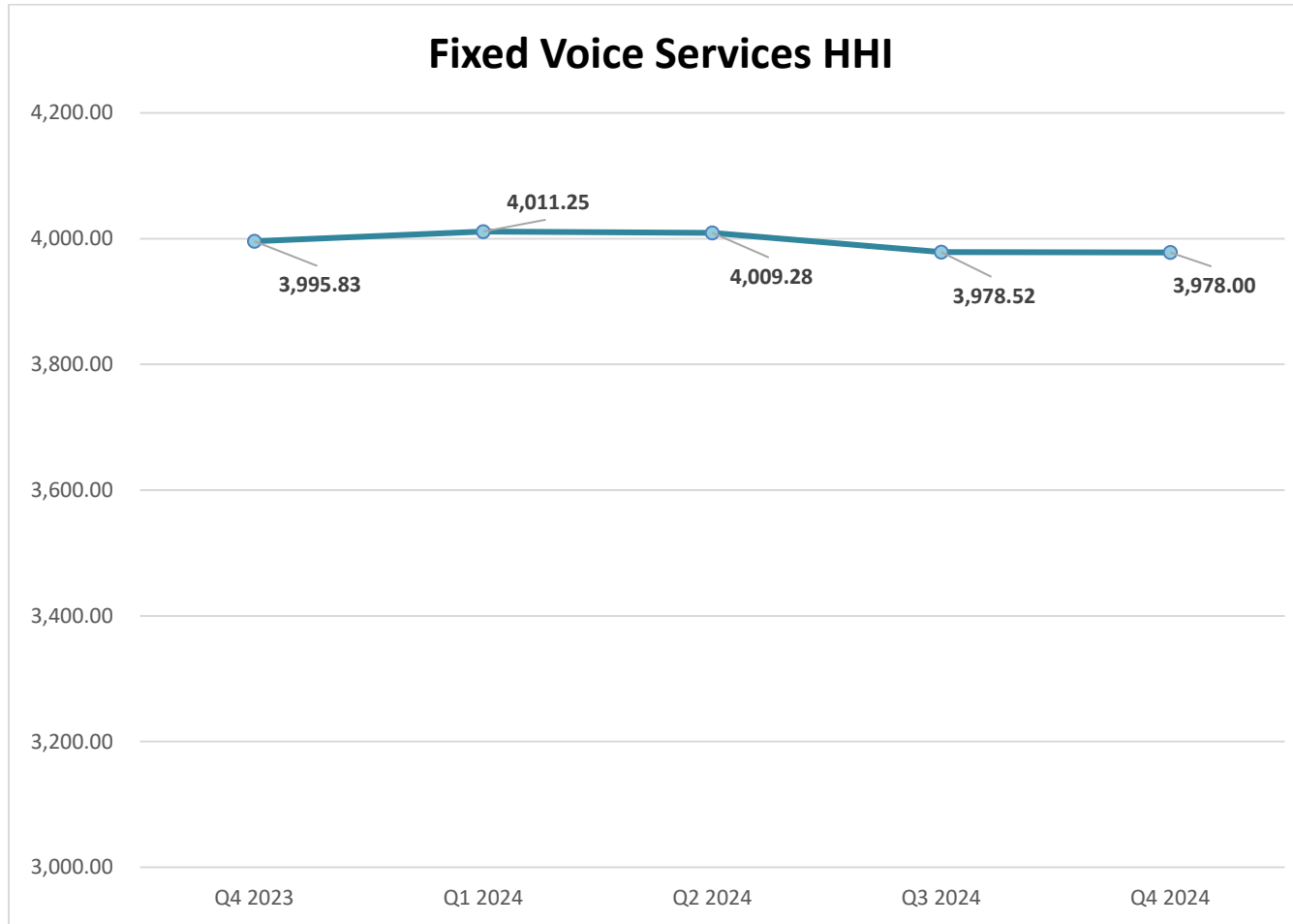
Figure 6: International Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q4 '24/Q3 '24

-14.52%

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

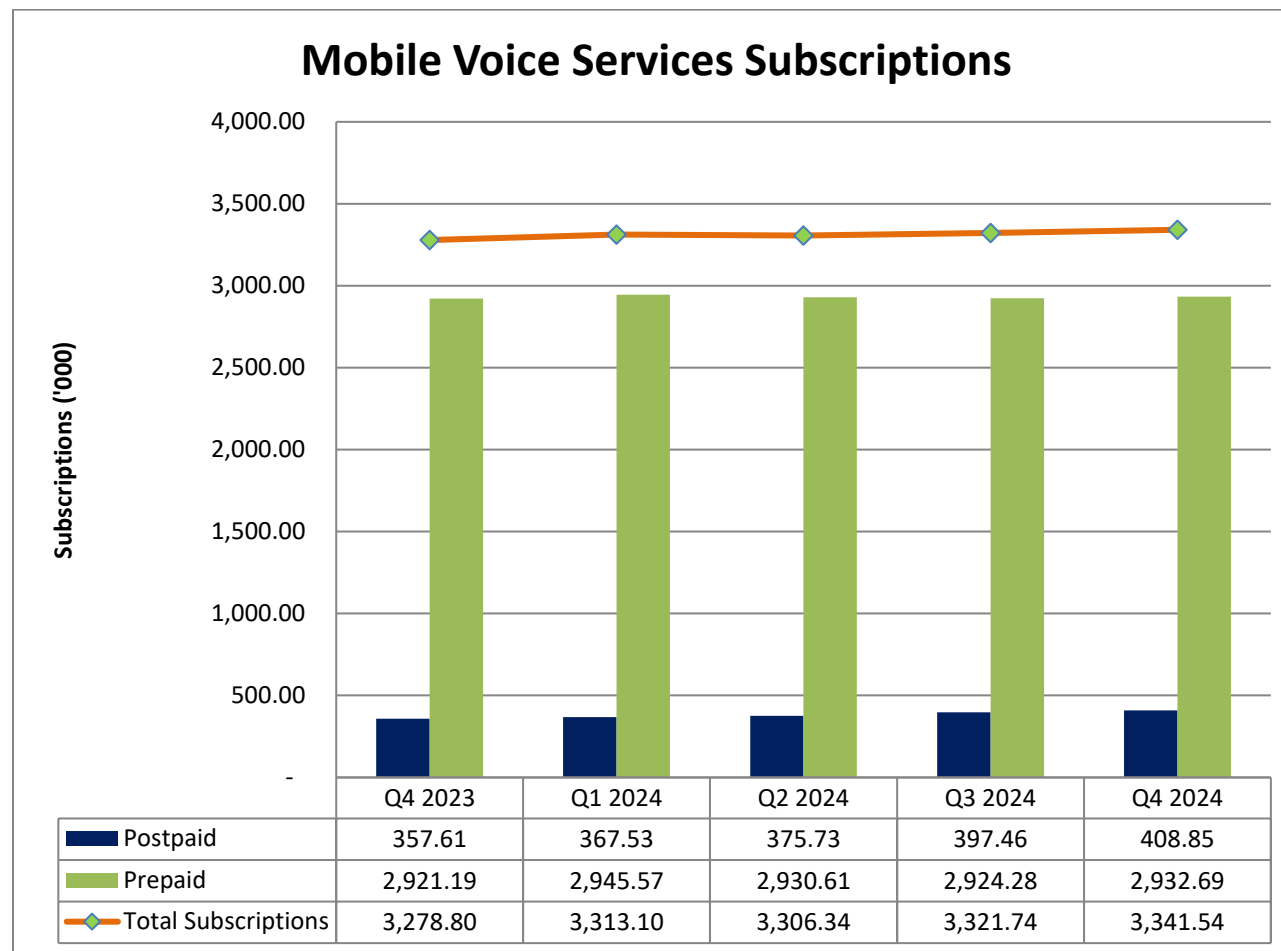


% Change: Q4 '24/Q3 '24

-0.01%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



% Change: Q4 '24/Q3 '24

Total Subscriptions:

0.60%

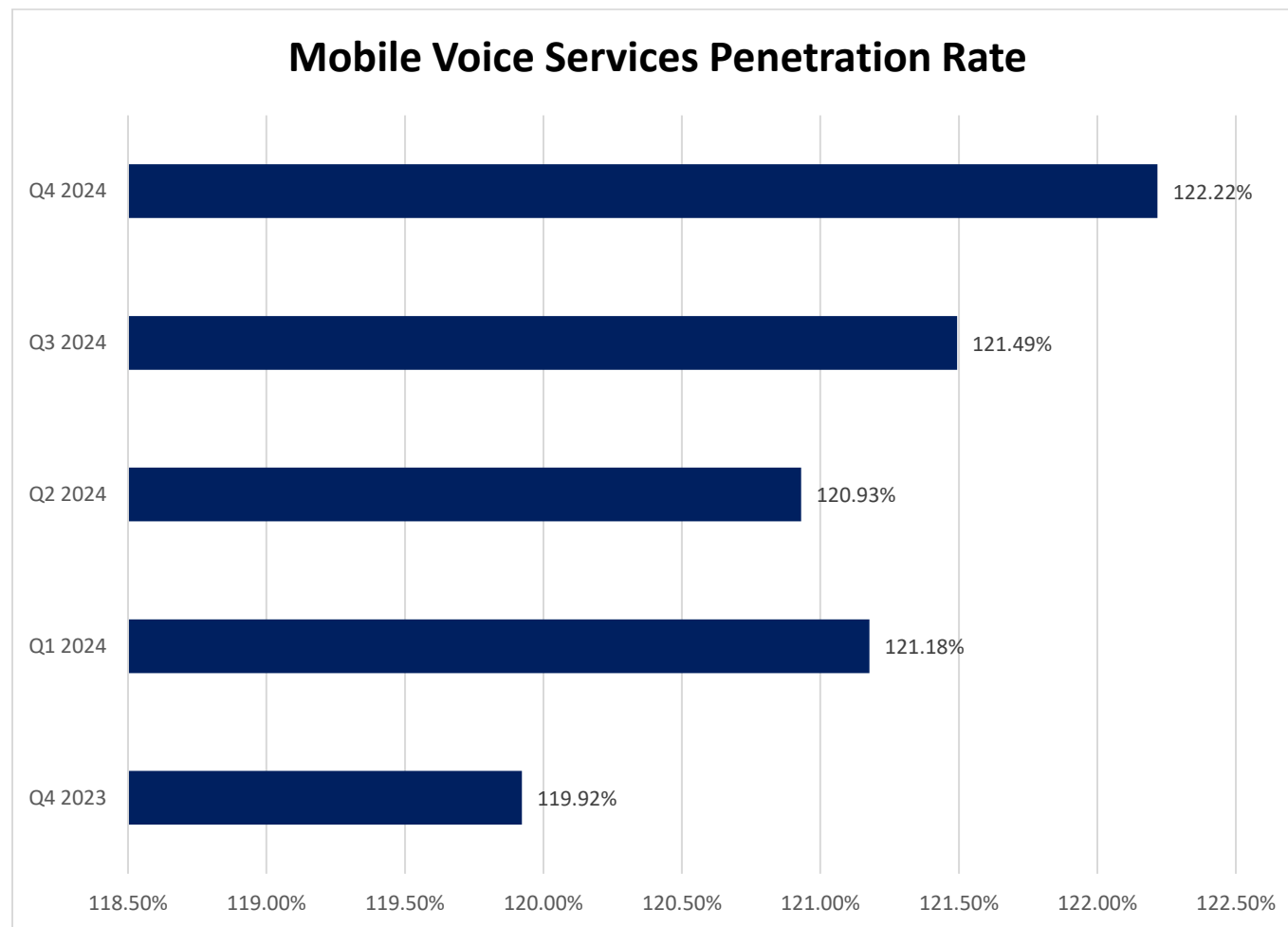
Postpaid:

2.87%

Prepaid:

0.29%

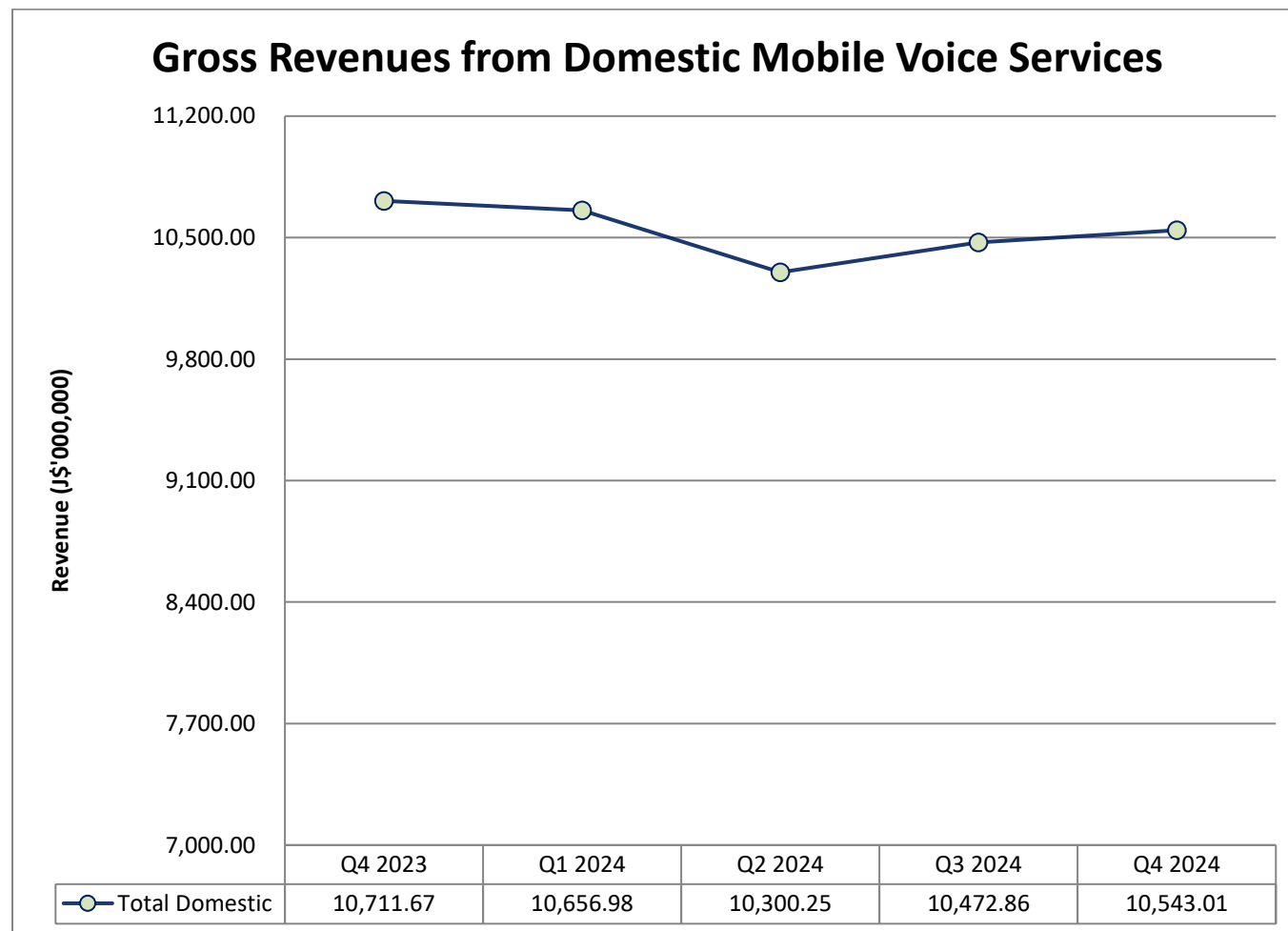
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q4 '24/Q3 '24

0.60%

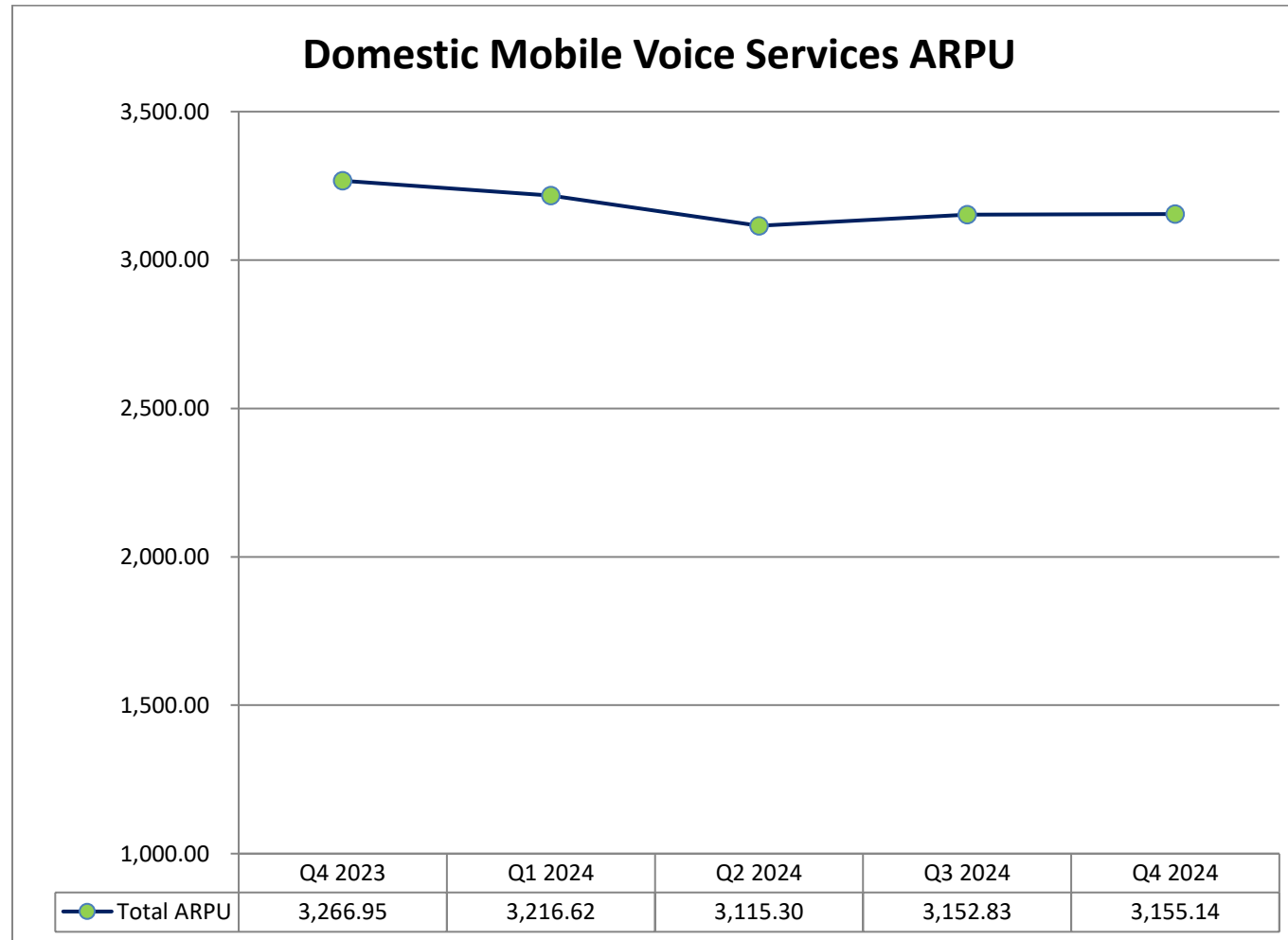
Figure 10: Gross Revenues from Domestic Mobile Voice Services



% Change: Q4 '24/Q3 '24

0.67%

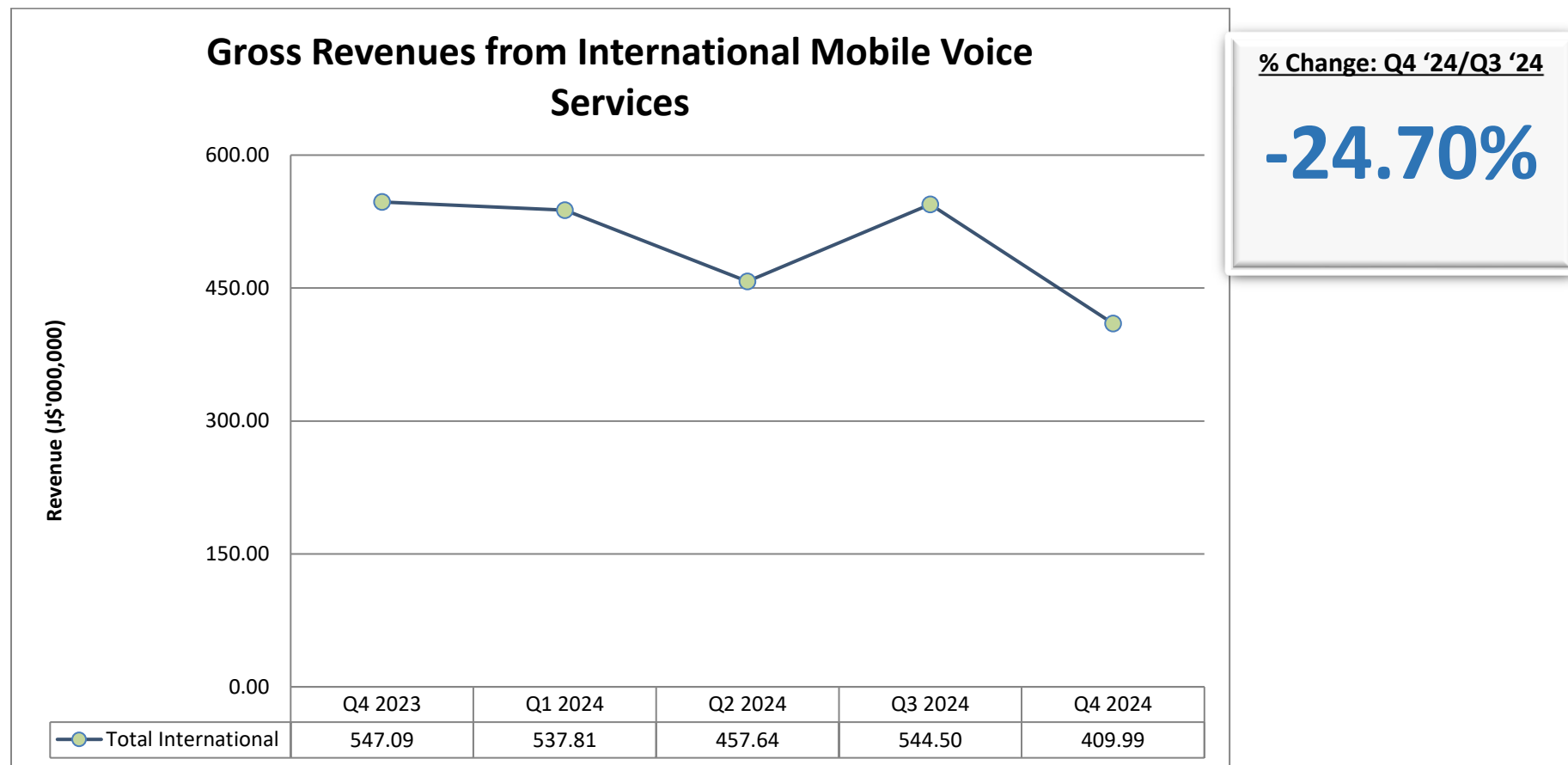
Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q4 '24/Q3 '24

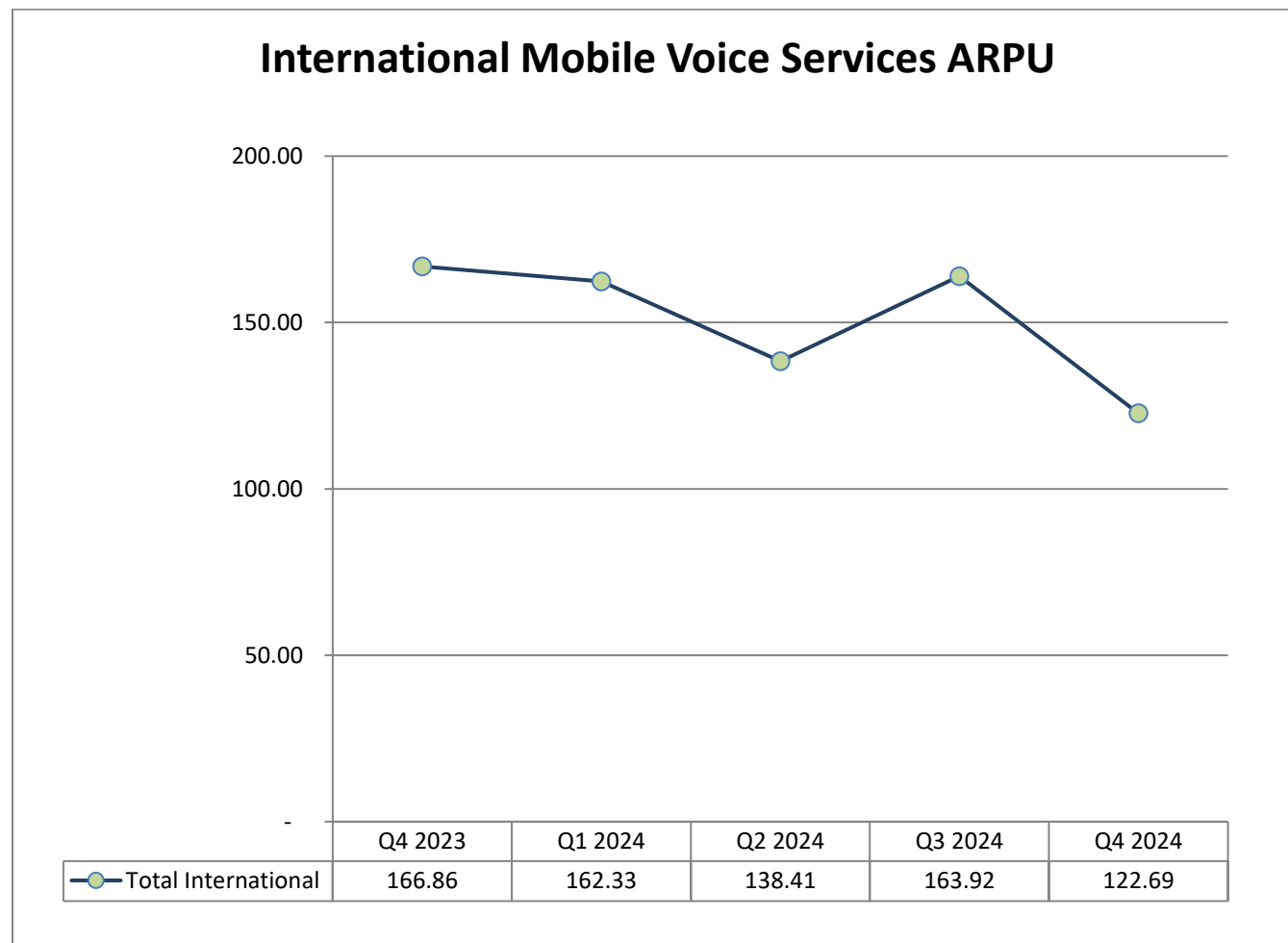
0.07%

Figure 12: Gross Revenues from International Mobile Voice Services¹



¹ The decline in gross revenues from international mobile voice services for the Q4 2024 period was due to a reduction in traditional international voice calls as customers increasingly used VOIP services and video calls.

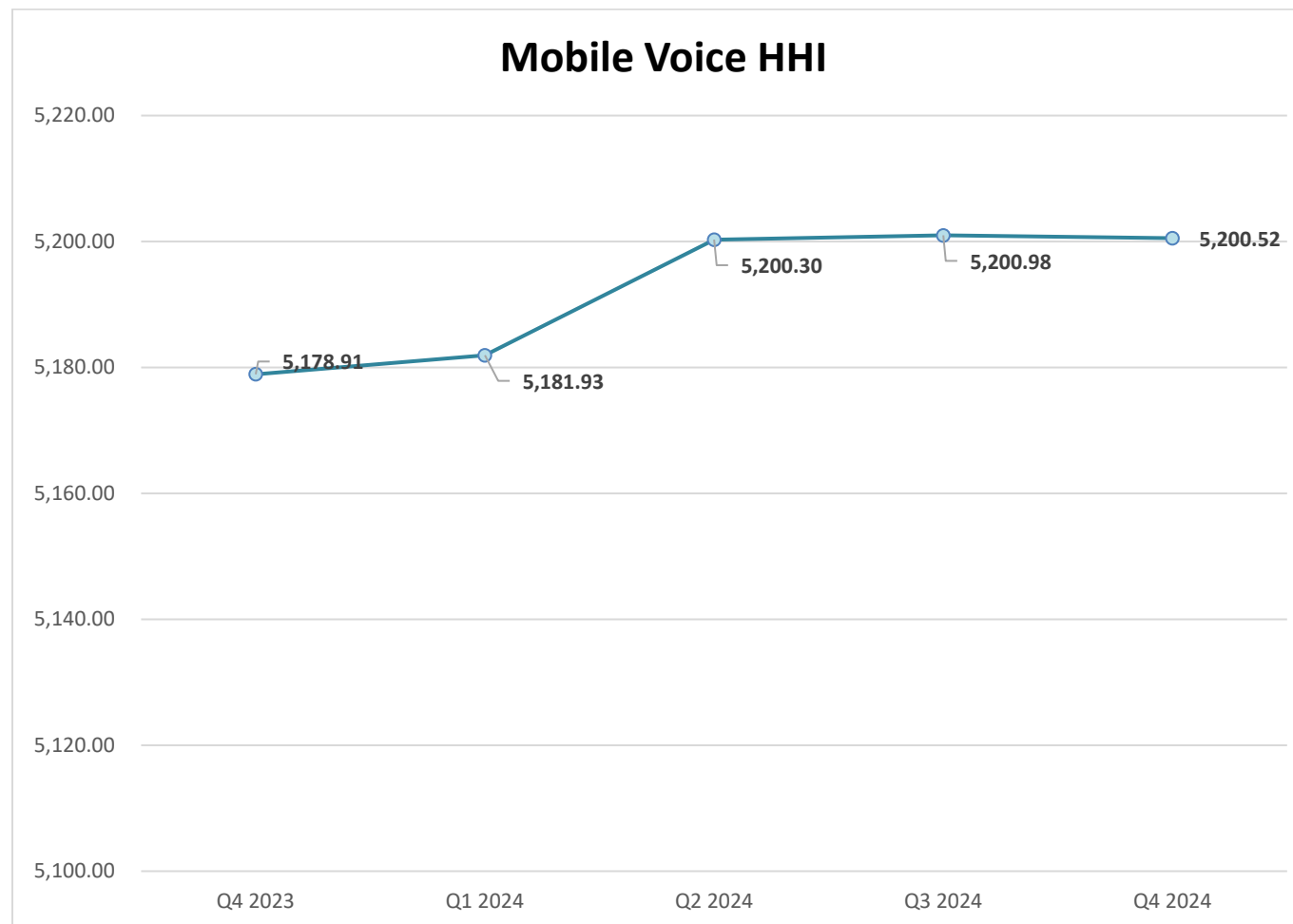
Figure 13: International Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q4 '24/Q3 '24

-25.15%

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

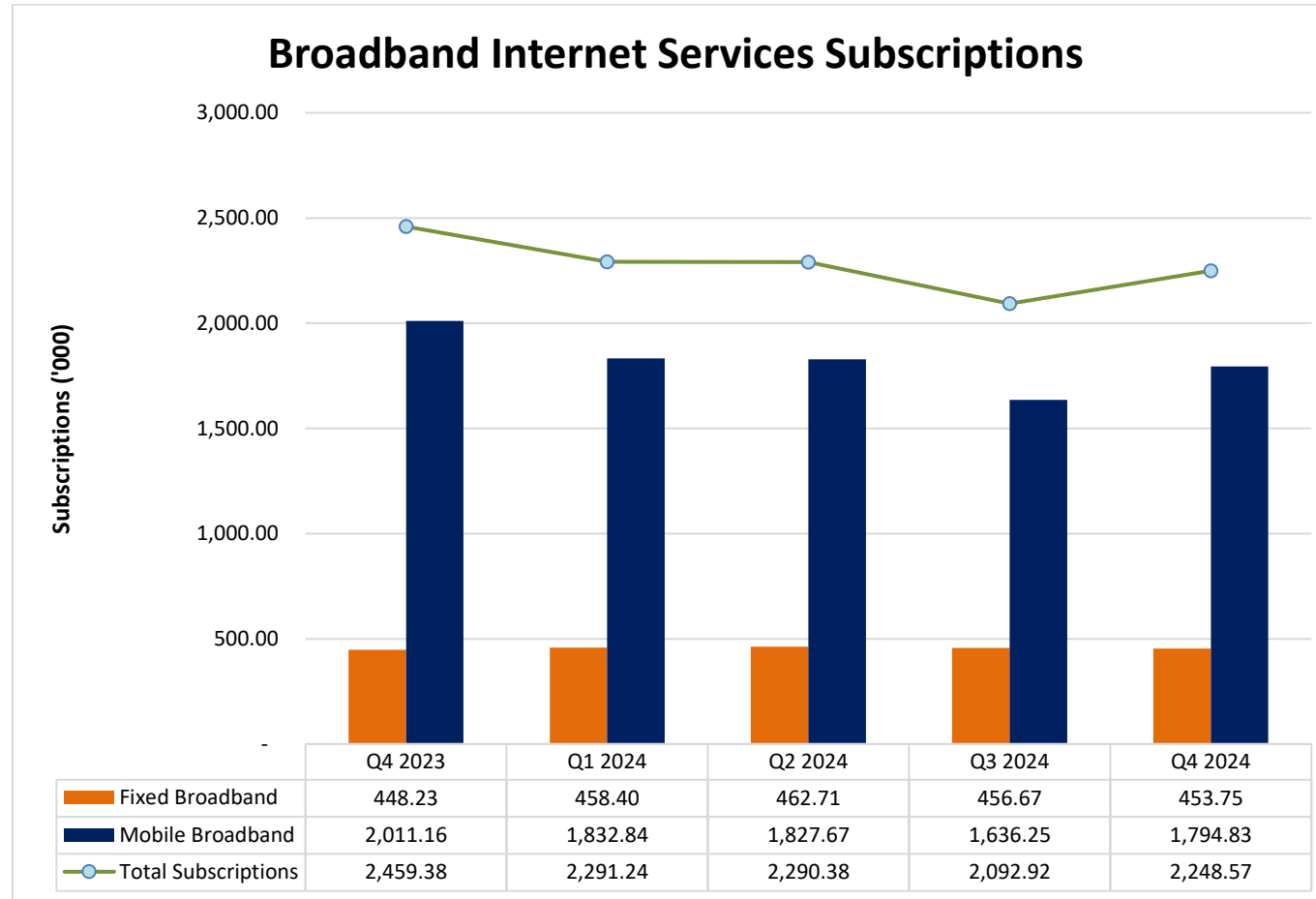


% Change: Q4 '24/Q3 '24

-0.01%

Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions



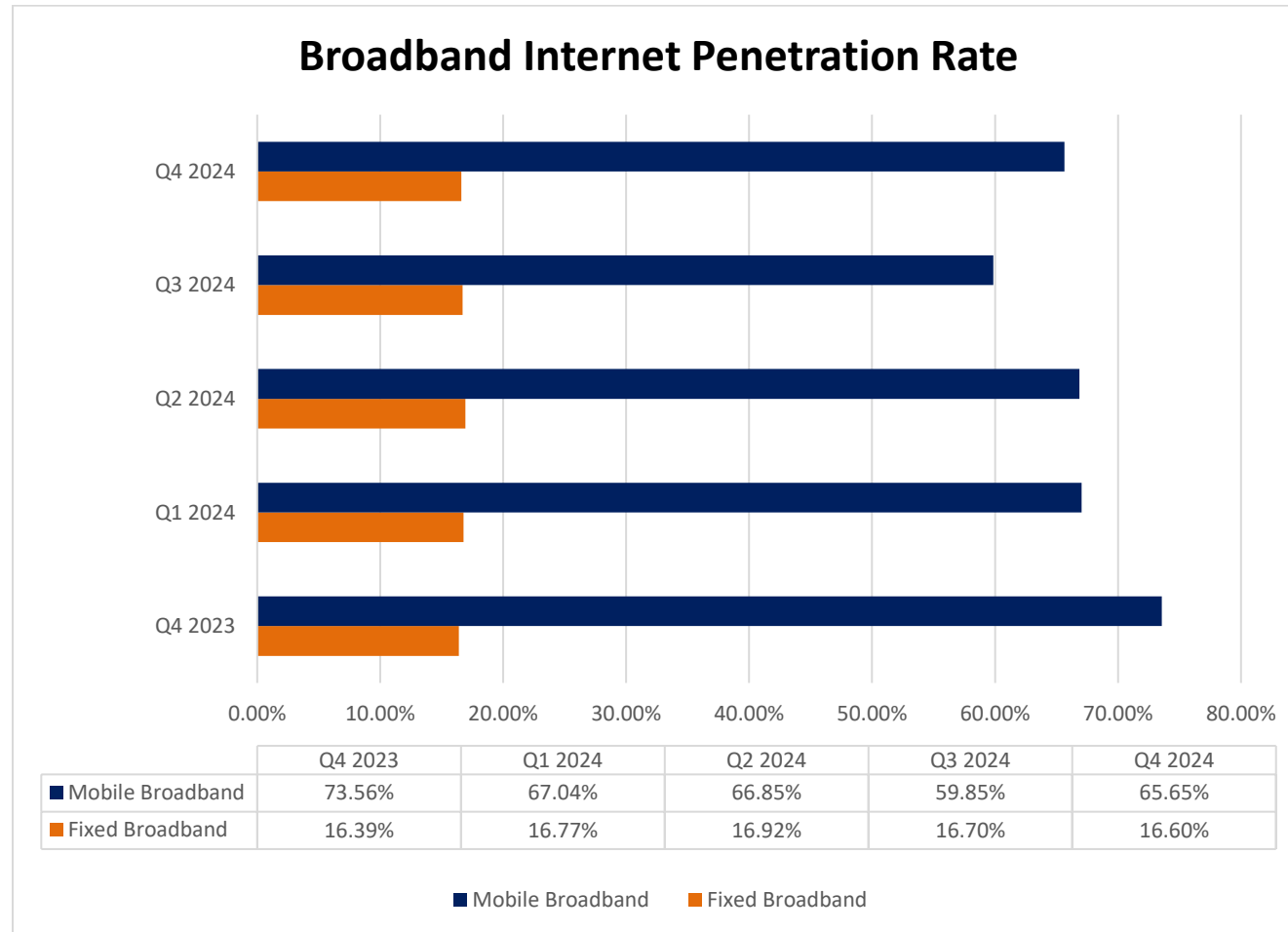
% Change: Q4 '24/Q3 '24

Total Subscriptions:
7.44%

Fixed Broadband:
-0.64%

Mobile Broadband:
9.69%

Figure 16: Broadband Internet Penetration Rate



% Change: Q4 '24/Q3 '24

Fixed Broadband:
-0.64%

Mobile Broadband:
9.69%

Figure 17: Broadband Internet Revenue Distribution

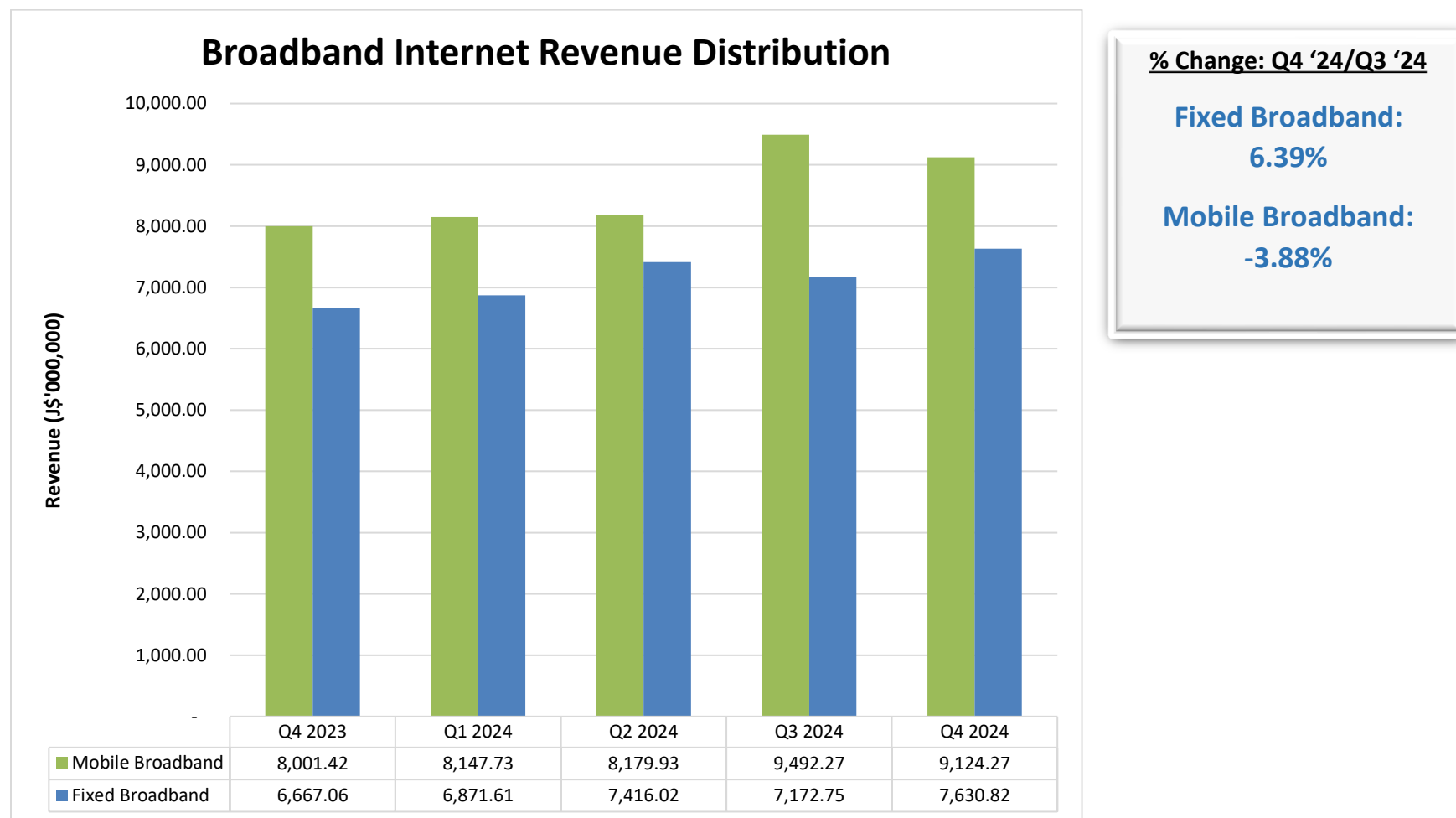
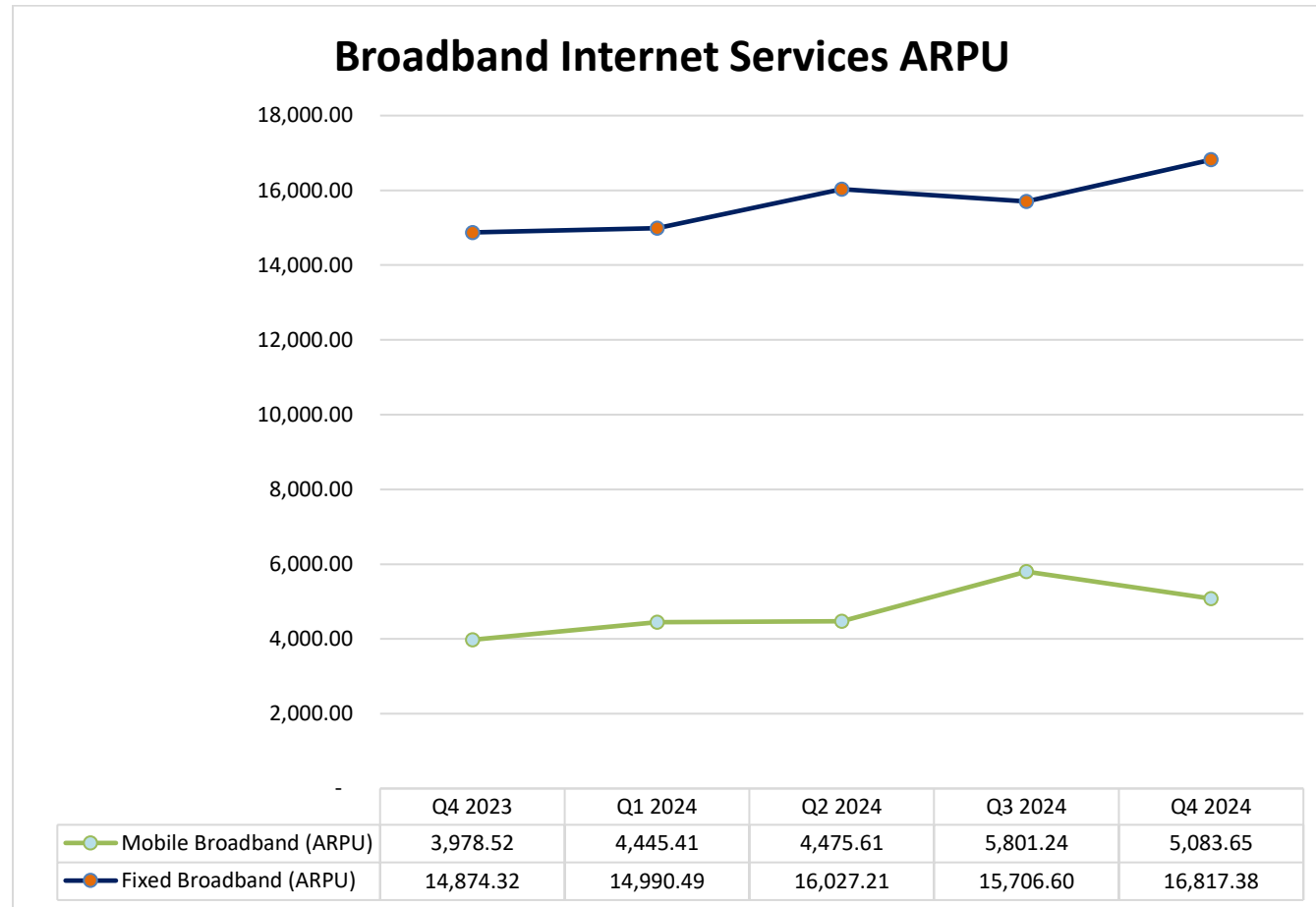


Figure 18: Broadband Internet Services Average Revenue per User (ARPU)

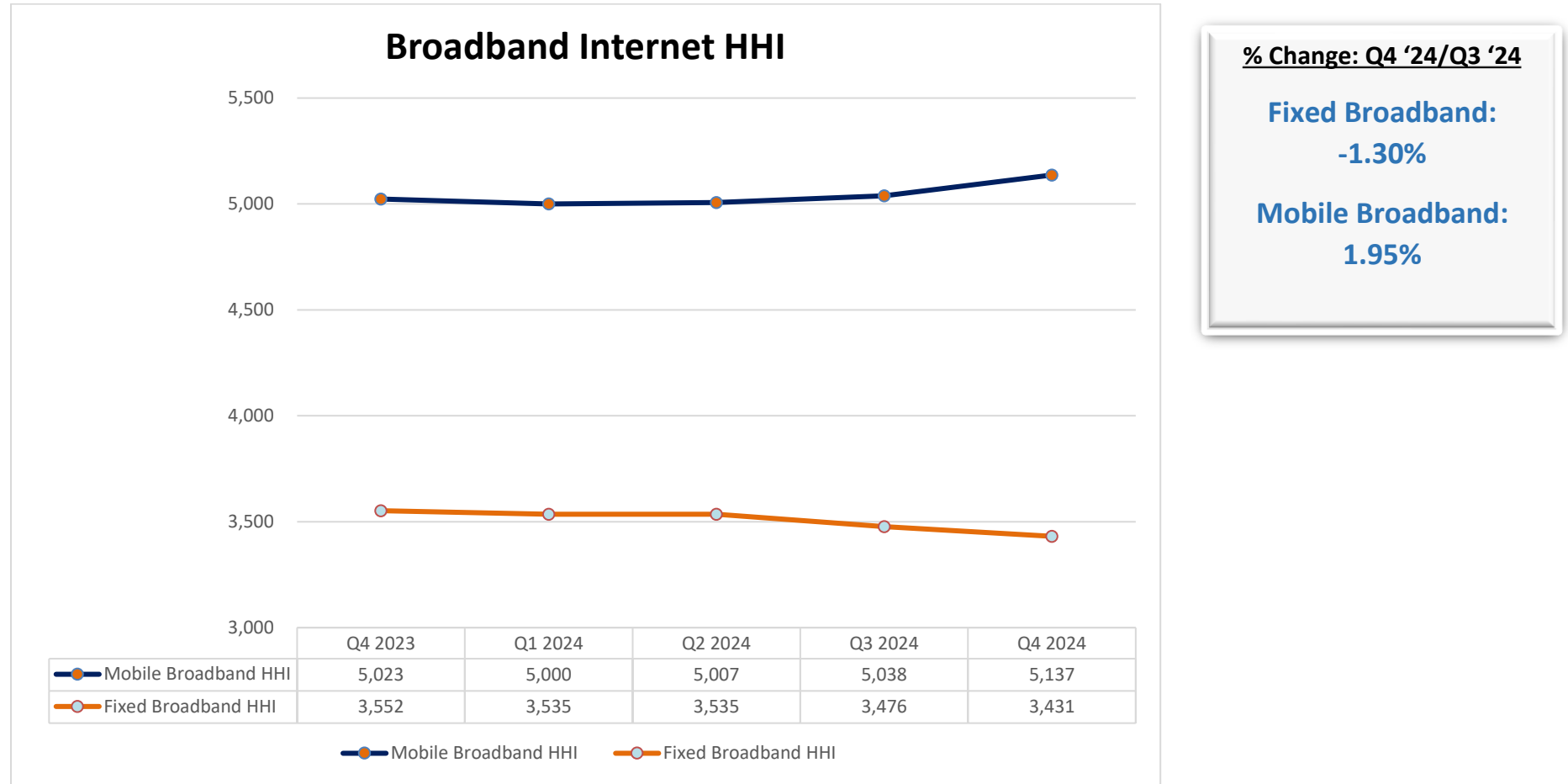


% Change: Q4 '24/Q3 '24

Fixed Broadband:
7.07%

Mobile Broadband:
-12.37%

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



Industry Penetration and Concentration

Penetration Rate²

Penetration Rate	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Fixed Voice Subscription Penetration Rate	16.78%	17.02%	17.11%	16.73%	16.60%
Mobile Voice Subscription Penetration Rate	119.92%	121.18%	120.93%	121.49%	122.22%
Fixed Broadband Subscription Penetration Rate	16.39%	16.77%	16.92%	16.70%	16.60%
Mobile Broadband Subscription Penetration Rate	73.56%	67.04%	66.85%	59.85%	65.65%
Total Broadband Subscription Penetration Rate	89.95%	83.80%	83.77%	76.55%	82.25%

Concentration Ratio (Herfindahl-Hirschman Index)³

Herfindahl-Hirschman Index (HHI)	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Fixed Voice HHI	3,996	4,011	4,009	3,979	3,978
Mobile Voice HHI	5,179	5,182	5,200	5,201	5,201
Fixed Broadband HHI	3,552	3,535	3,535	3,476	3,431
Mobile Broadband HHI	5,023	5,000	5,007	5,038	5,137

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

³ Calculated using subscription data.

Appendix

Fixed Voice Services	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	% Change Q4 '24/Q3 '24	% Change Q4 '24/Q4 '23
Total Subscriptions ('000)	458.72	465.29	467.90	457.39	453.88	-0.77	-1.06
Gross Domestic Revenue (J\$' million)	1,155.70	1,127.19	1,119.54	938.87	1,001.55	6.68	-13.34
Gross Domestic ARPU	2,519.38	2,422.56	2,392.69	2,052.67	2,206.65	7.50	-12.41
Gross International Revenue (J\$' million)	121.86	134.14	109.84	98.59	83.63	-15.17	-31.37
International ARPU	265.64	288.29	234.76	215.54	184.25	-14.52	-30.64

Mobile Voice Services	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	% Change Q4 '24/Q3 '24	% Change Q4 '24/Q4 '23
Total Subscriptions ('000)	3,278.80	3,313.10	3,306.34	3,321.74	3,341.54	0.60	1.91
Gross Domestic Revenue (J\$' million)	10,711.67	10,656.98	10,300.25	10,472.86	10,543.01	0.67	-1.57
Gross Domestic ARPU	3,266.95	3,216.62	3,115.30	3,152.83	3,155.14	0.07	-3.42
Gross International Revenue (J\$' million)	547.09	537.81	457.64	544.50	409.99	-24.70	-25.06
International ARPU	166.86	162.33	138.41	163.92	122.69	-25.15	-26.47

Internet Services	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	% Change Q4 '23/Q3 '24	% Change Q4 '24/Q4 '23
Total Subscriptions ('000)	2,459.38	2,291.24	2,290.38	2,092.92	2,248.57	7.44	-8.57
Fixed Broadband	448.23	458.40	462.71	456.67	453.75	-0.64	1.23
Mobile Broadband	2,011.16	1,832.84	1,827.67	1,636.25	1,794.83	9.69	-10.76
Total Revenue (J\$' million)	14,668.47	15,019.34	15,595.94	16,665.02	16,755.09	0.54	14.23
Total ARPU	5,964.29	6,555.11	6,809.32	7,962.57	7,451.43	-6.42	24.93

Penetration Rate	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024
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