
Office of Utilities Regulation

Telecommunications Market Information Report January - March 2025



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Document Number 2025/TEL/014/QSR.003
Office of Utilities Regulation
2025 November 19

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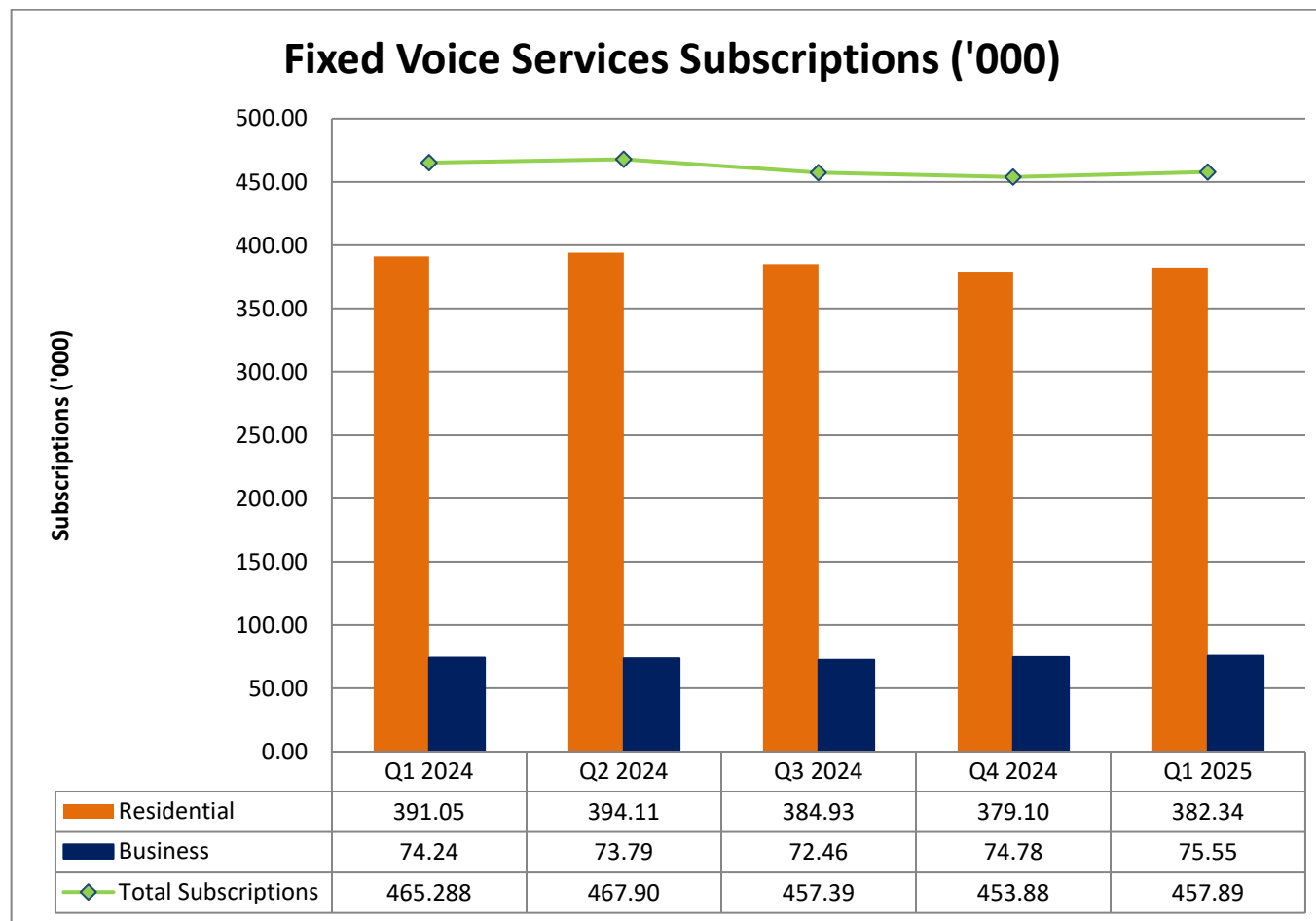
Contents

Fixed Voice Data	5
Figure 1: Fixed Voice Services Subscriptions	6
Figure 2: Fixed Voice Services Penetration Rate	7
Figure 3: Gross Revenues from Domestic Fixed Voice Services	8
Figure 4: Domestic Fixed Voice Services Average Revenue per User (ARPU)	9
Figure 5: Gross Revenues from International Fixed Voice Services	10
Figure 6: International Fixed Voice Services Average Revenue per User (ARPU)	11
Figure 7: Fixed Voice Services Herfindahl-Hirschman Index (HHI)	12
Mobile Voice Data	13
Figure 8: Mobile Voice Services Subscriptions	13
Figure 9: Mobile Voice Services Penetration Rate	14
Figure 10: Gross Revenues from Domestic Mobile Voice Services	16
Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)	17
Figure 12: Gross Revenues from International Mobile Voice Services	18
Figure 13: International Mobile Voice Services Average Revenue per User (ARPU)	19
Figure 14: Mobile Voice Services Herfindahl-Hirschman Index (HHI)	20
Broadband Internet Data	21
Figure 15: Broadband Internet Services Subscriptions	22
Figure 16: Broadband Internet Penetration Rate	23
Figure 17: Broadband Internet Revenue Distribution	24
Figure 18: Broadband Internet Services Average Revenue per User (ARPU)	25

Figure 19: Broadband Internet Services Herfindahl-Hirschman Index (HHI)	26
Industry Penetration and Concentration	27
Penetration Rate	28
Concentration Ratio (Herfindahl-Hirschman Index)	28
Appendix	29

Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions



% Change: Q1 '25/Q4 '24

Total Subscriptions:

0.88%

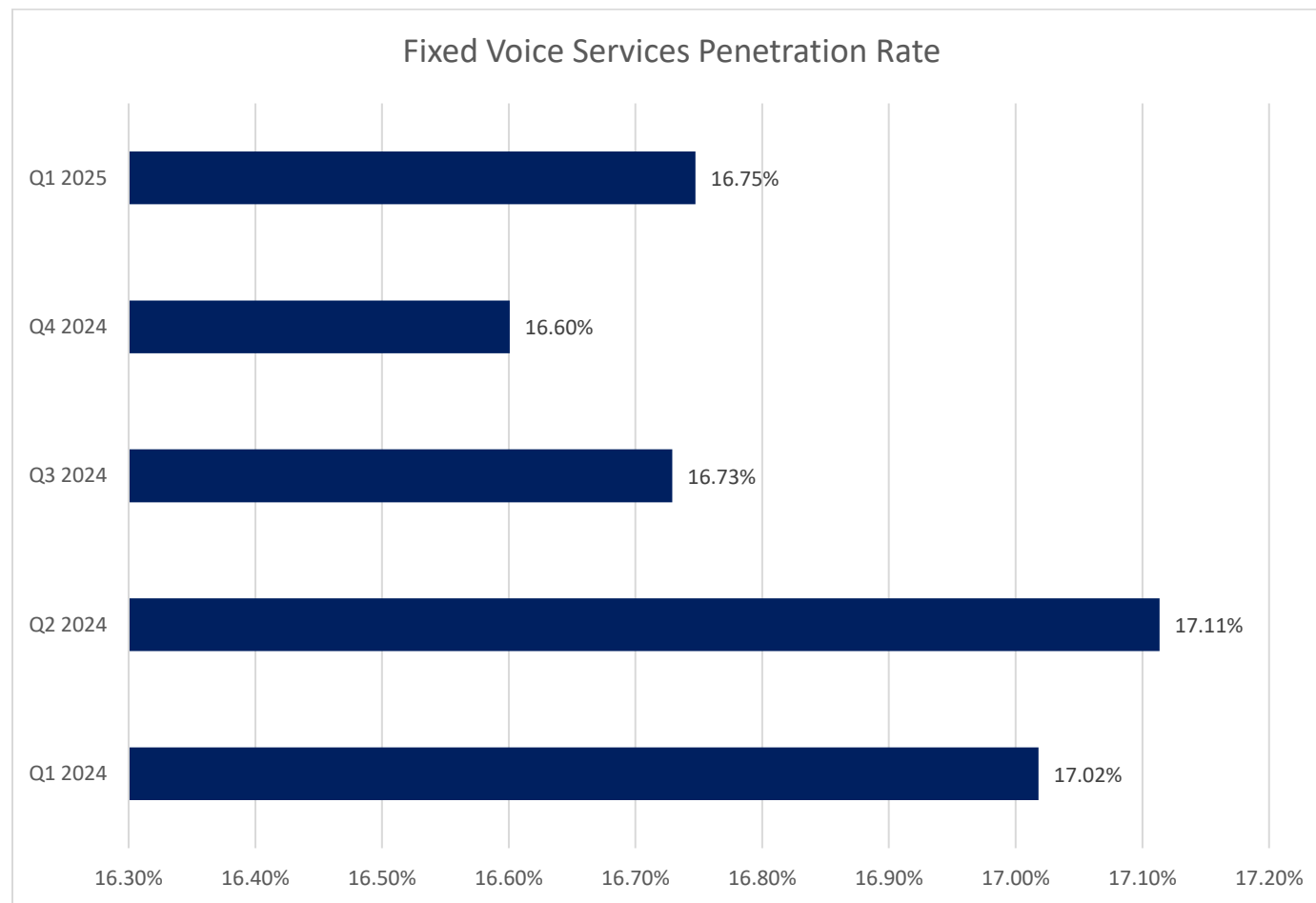
Residential:

0.85%

Business:

1.03%

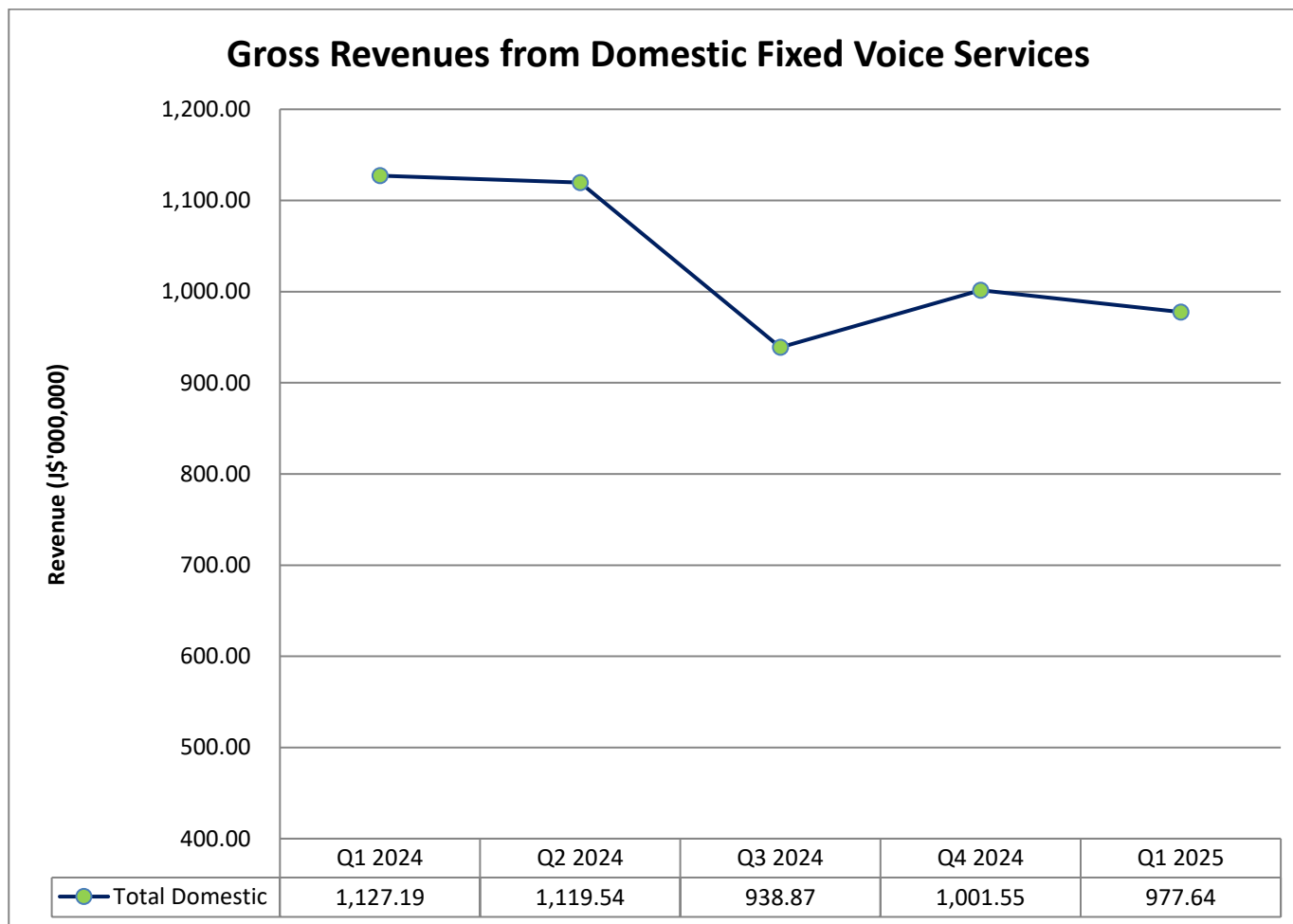
Figure 2: Fixed Voice Services Penetration Rate



% Change: Q1 '25/Q4 '24

0.88%

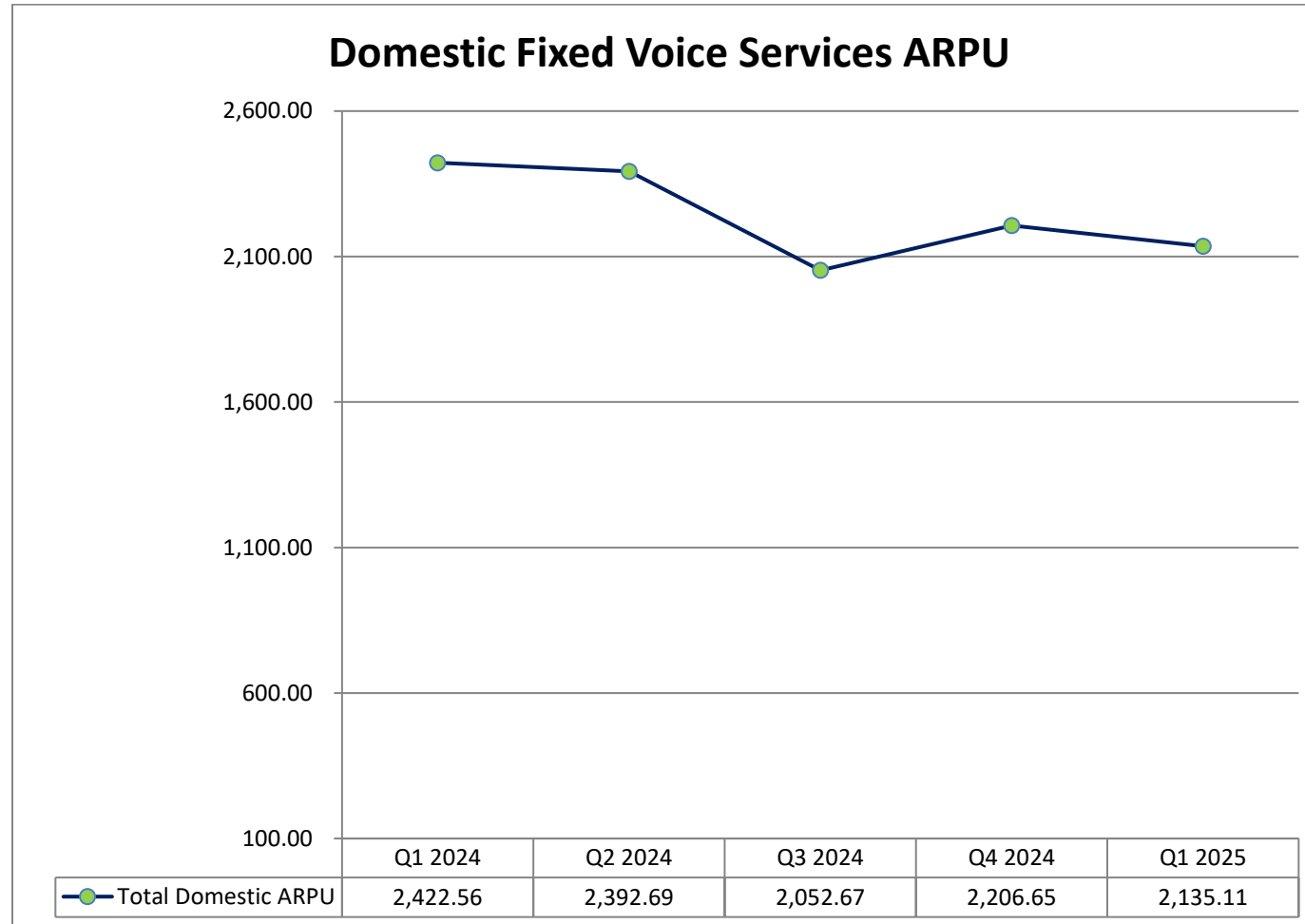
Figure 3: Gross Revenues from Domestic Fixed Voice Services



% Change Q1 '25/Q4 '24

-2.39%

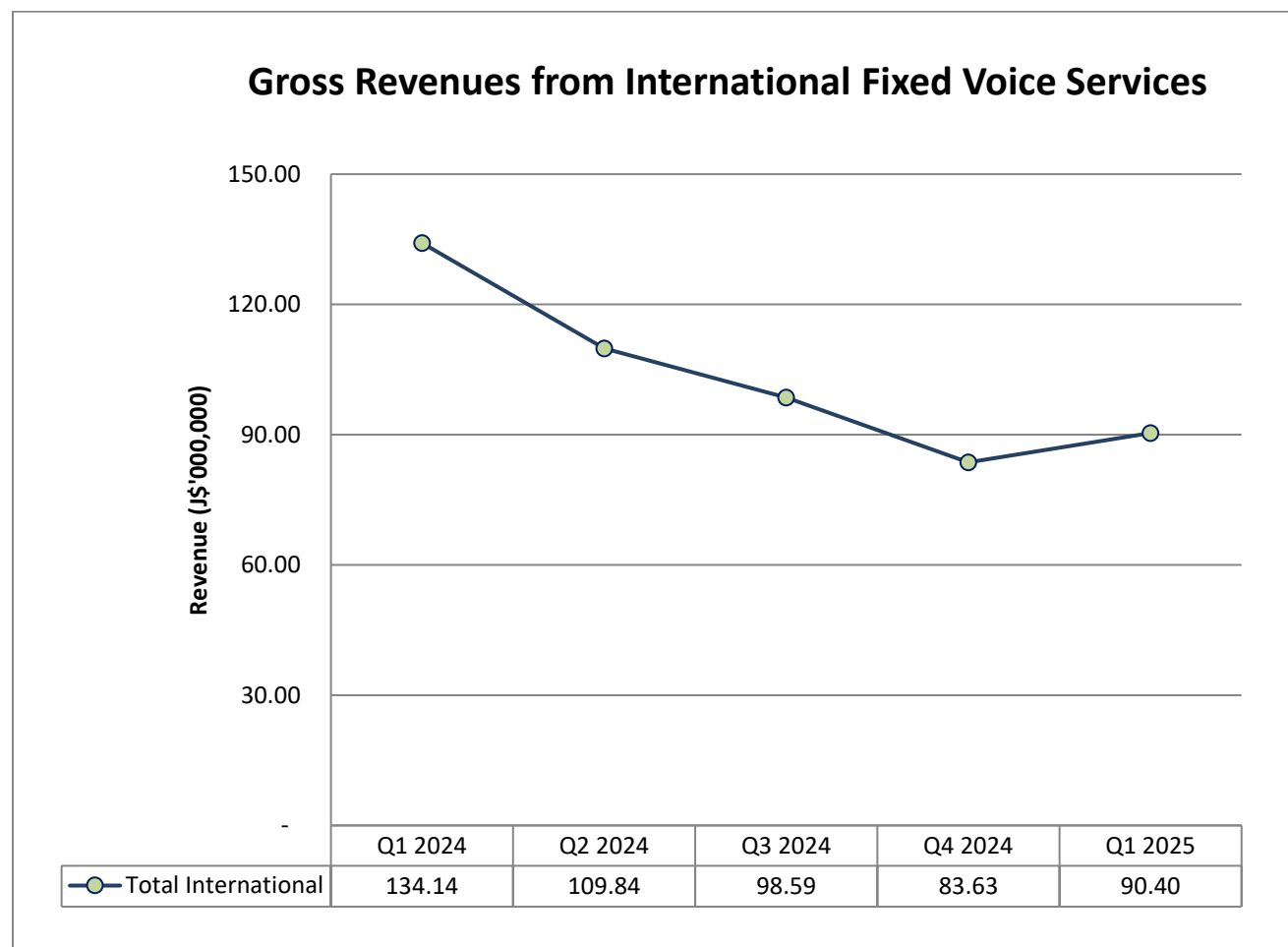
Figure 4: Domestic Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q1 '25/Q4 '24

-3.24%

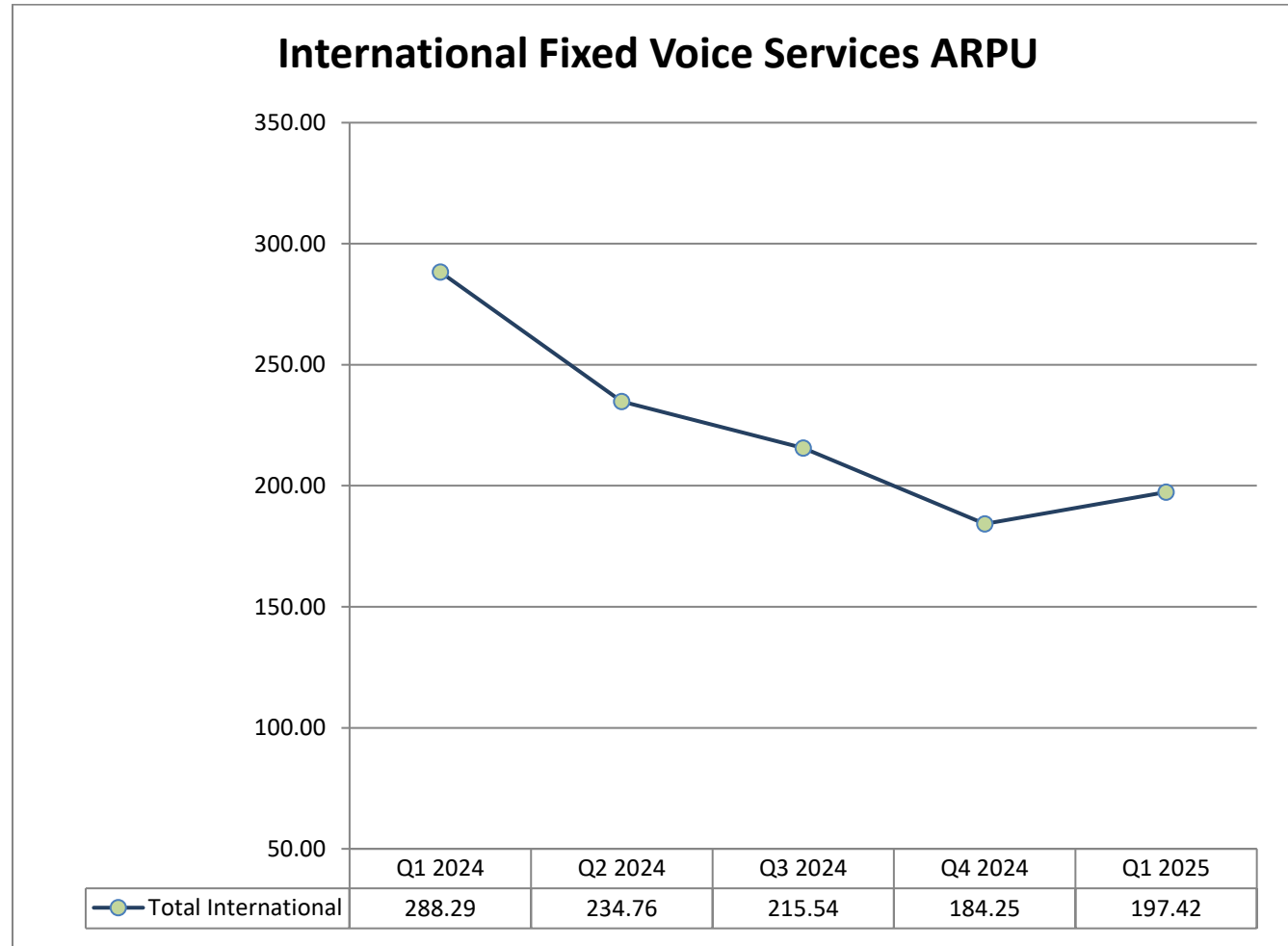
Figure 5: Gross Revenues from International Fixed Voice Services



% Change: Q1 '25/Q4 '24

8.09%

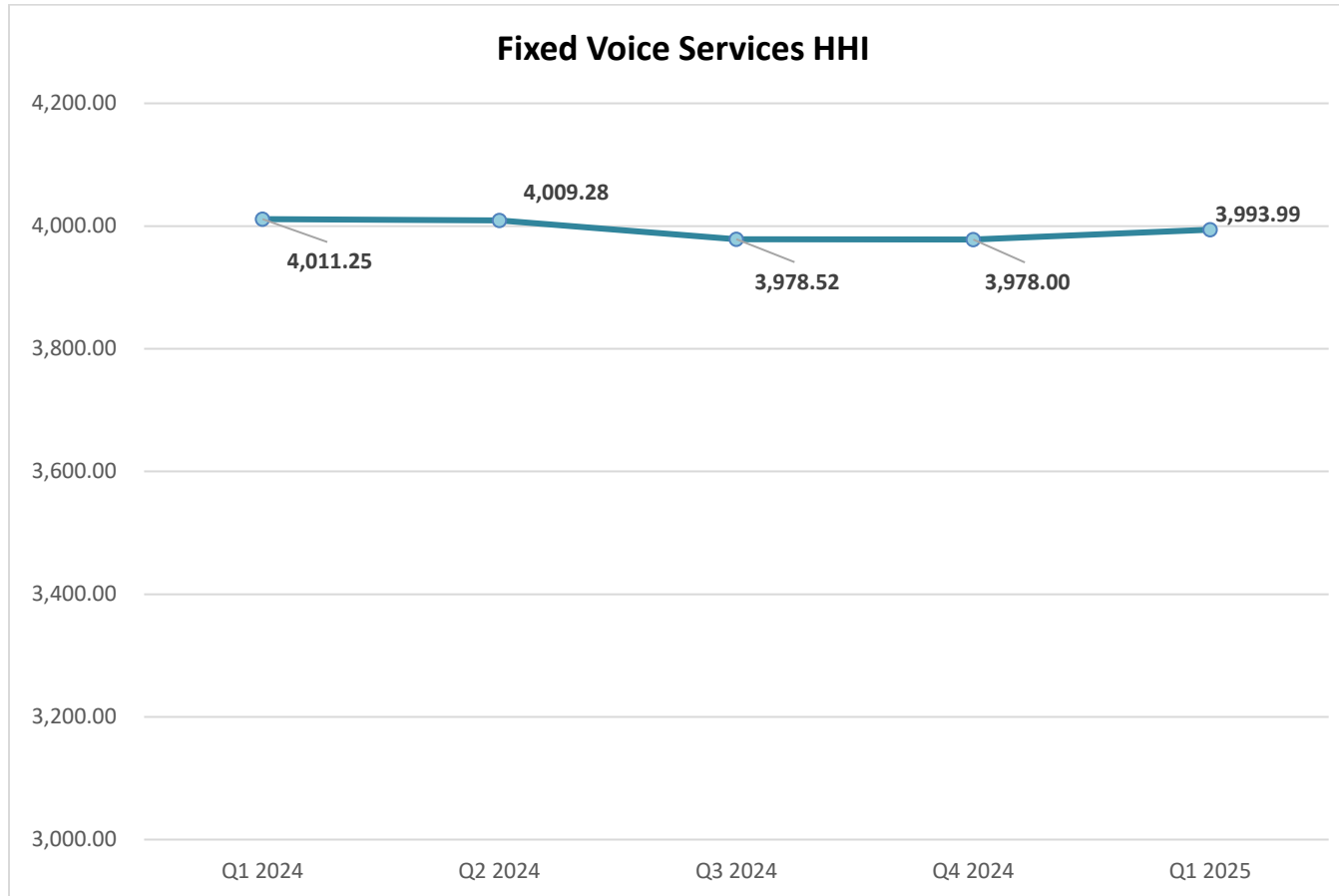
Figure 6: International Fixed Voice Services Average Revenue per User (ARPU)



% Change: Q1 '25/Q4 '24

7.15%

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

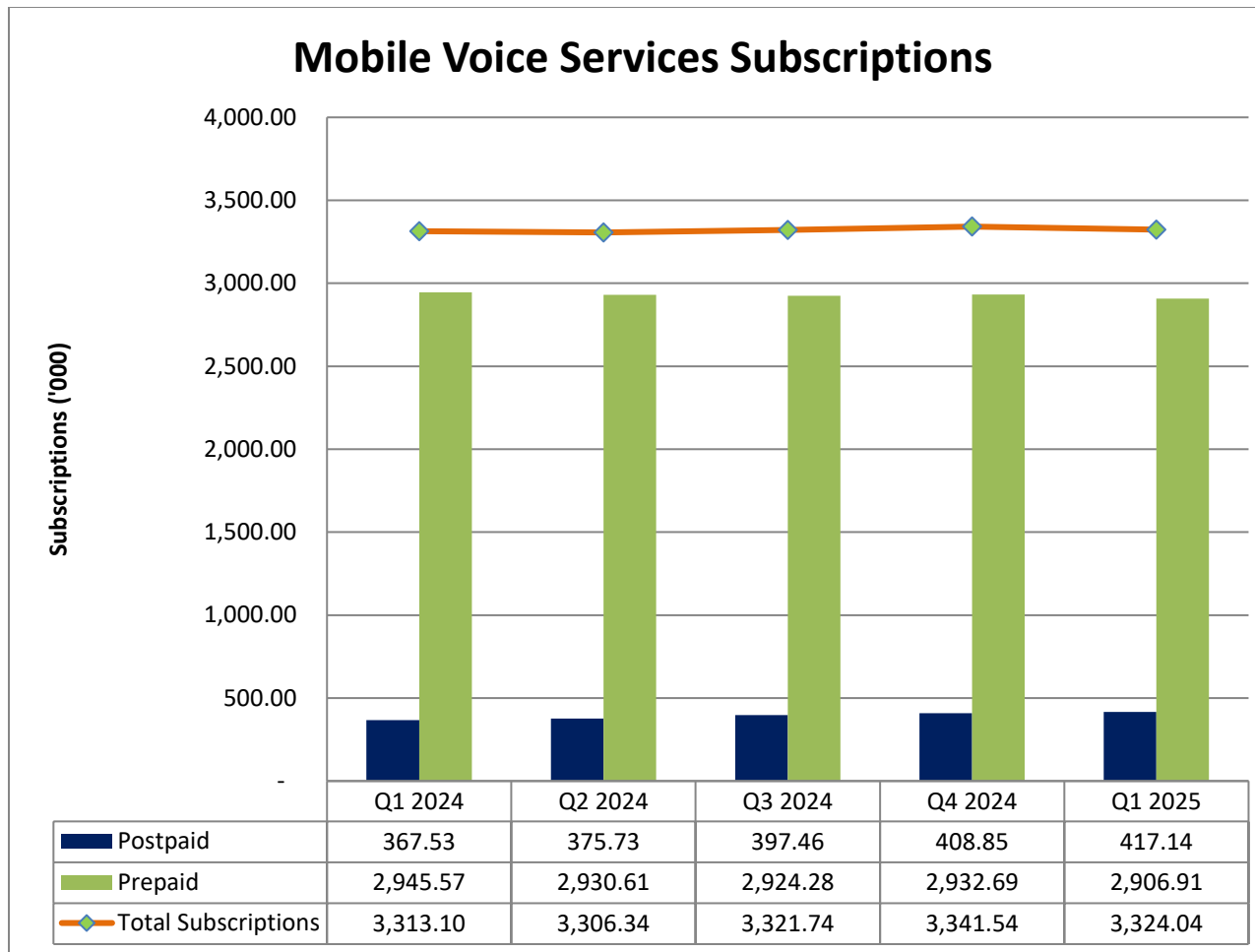


% Change: Q1 '25/Q4 '24

0.40%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



% Change: Q1 '25/Q4 '24

Total Subscriptions:

-0.52%

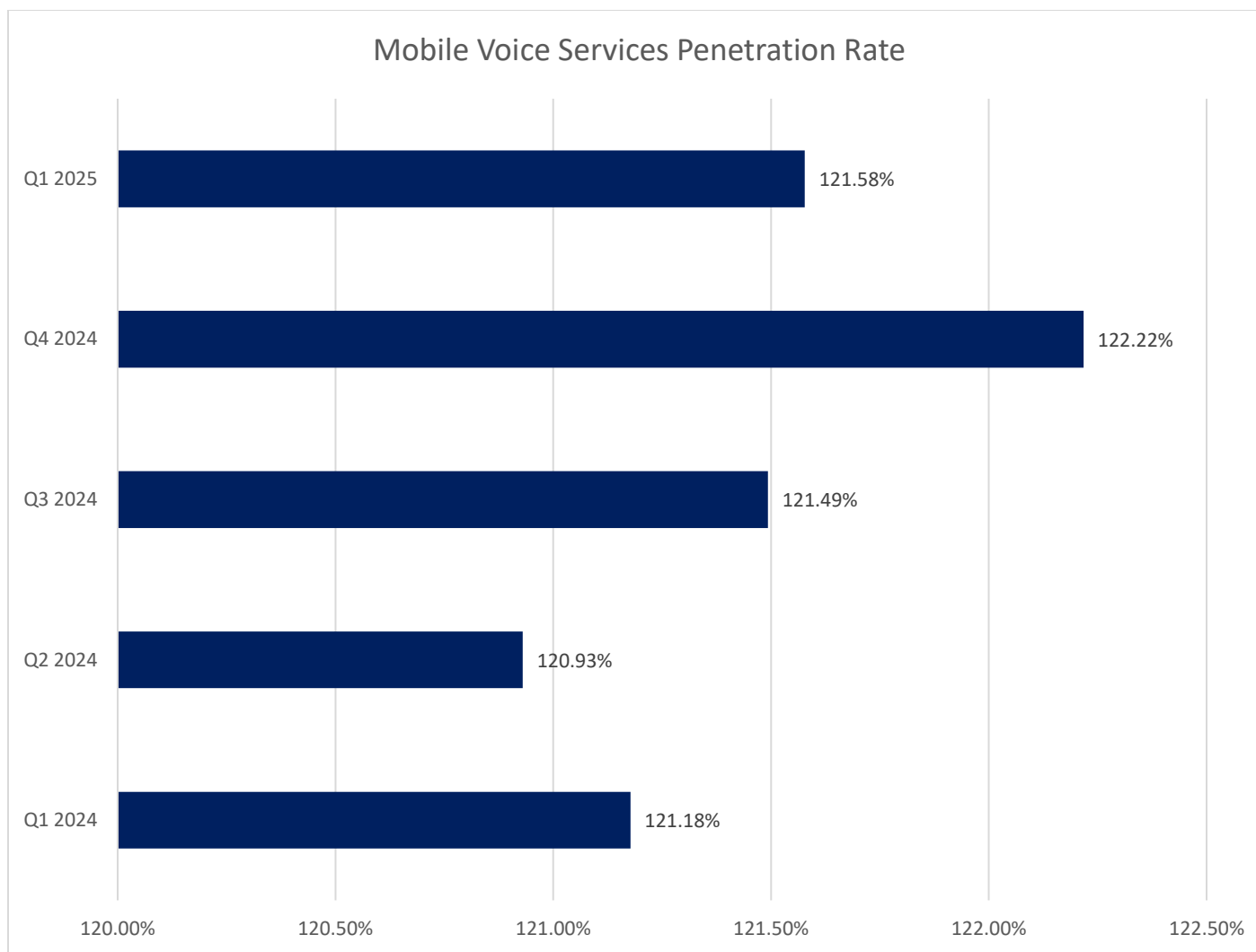
Postpaid:

2.03%

Prepaid:

-0.88%

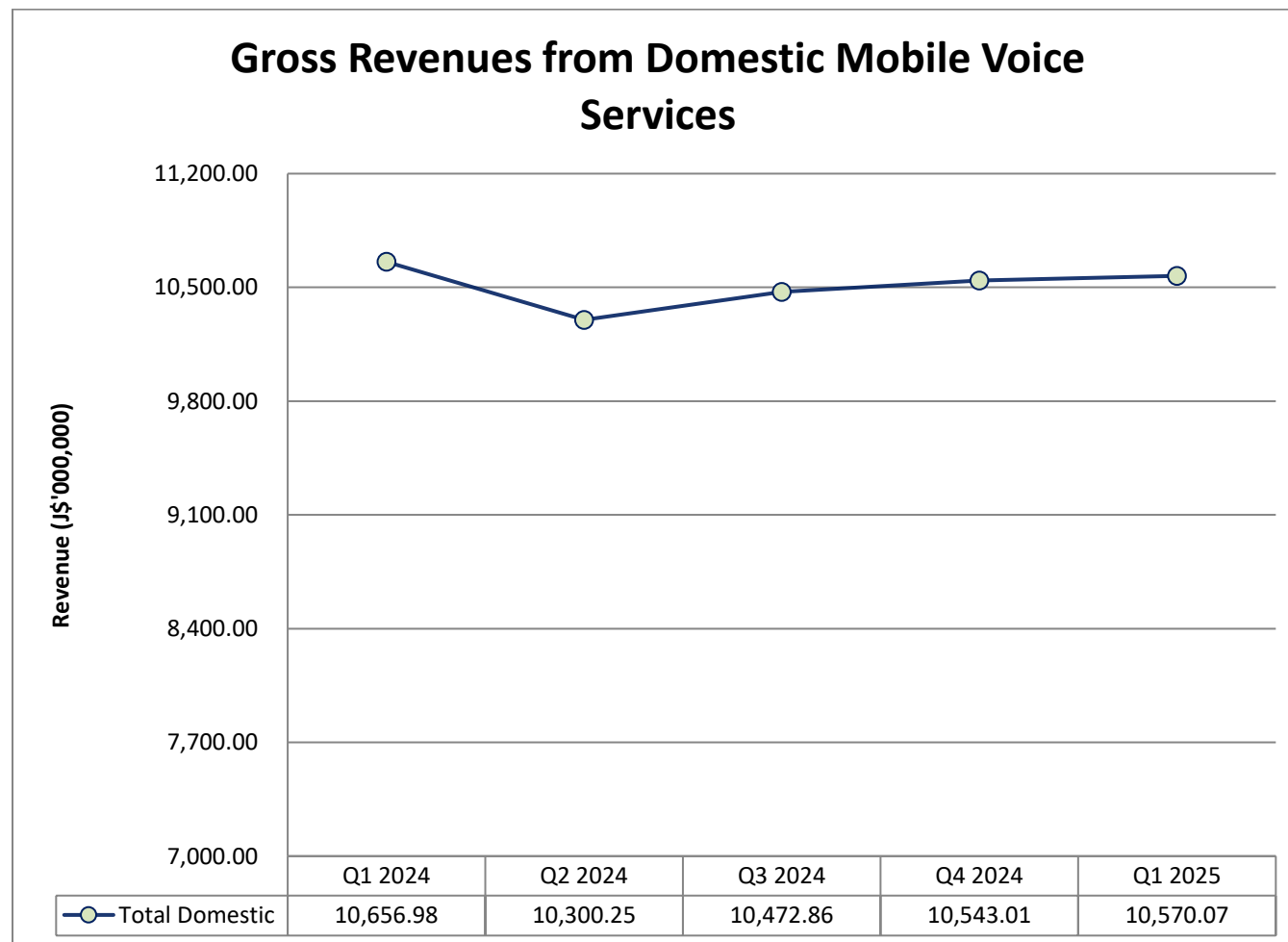
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q1 '25/Q4 '24

-0.52%

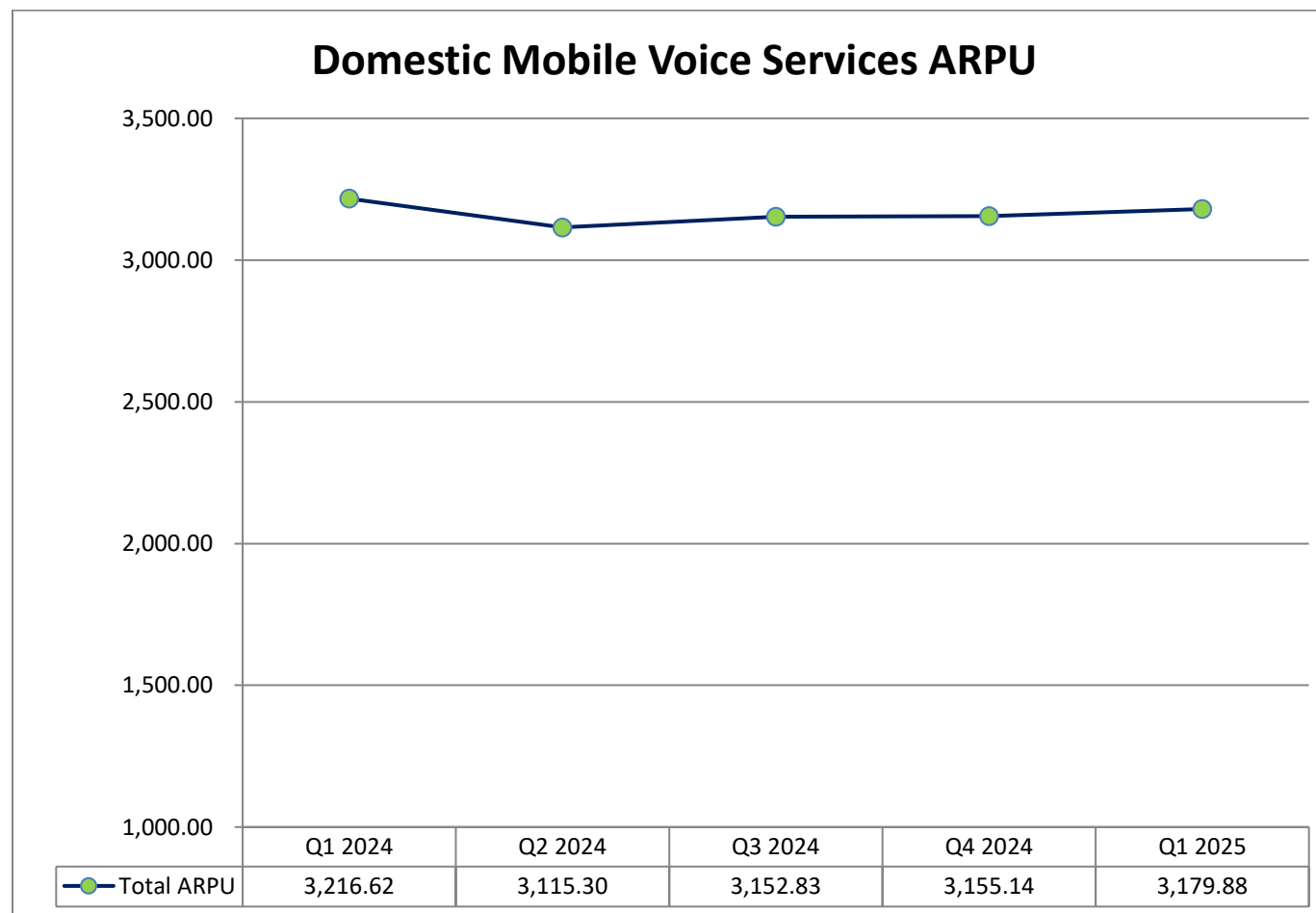
Figure 10: Gross Revenues from Domestic Mobile Voice Services



% Change: Q1 '25/Q4 '24

0.26%

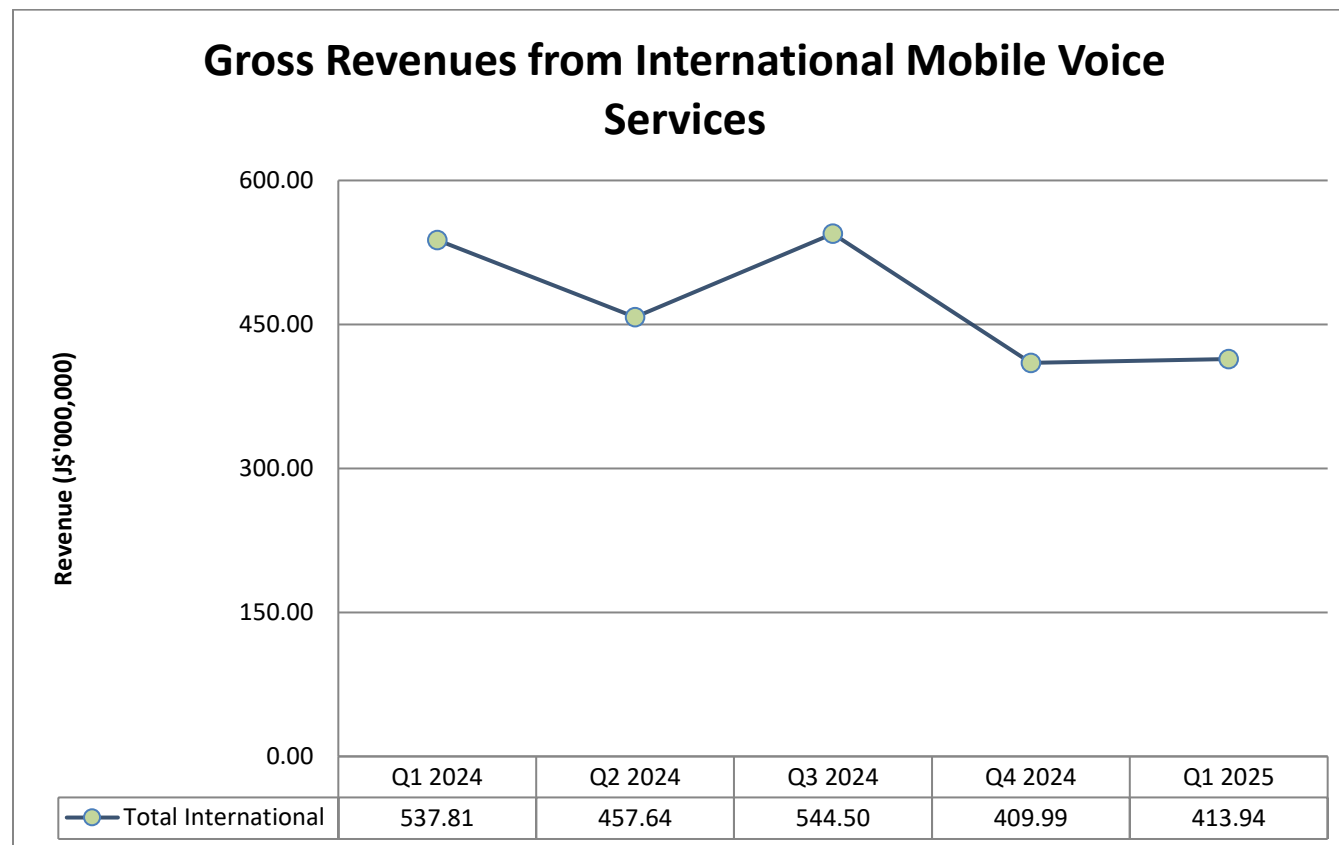
Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q1 '25/Q4 '24

0.78%

Figure 12: Gross Revenues from International Mobile Voice Services¹

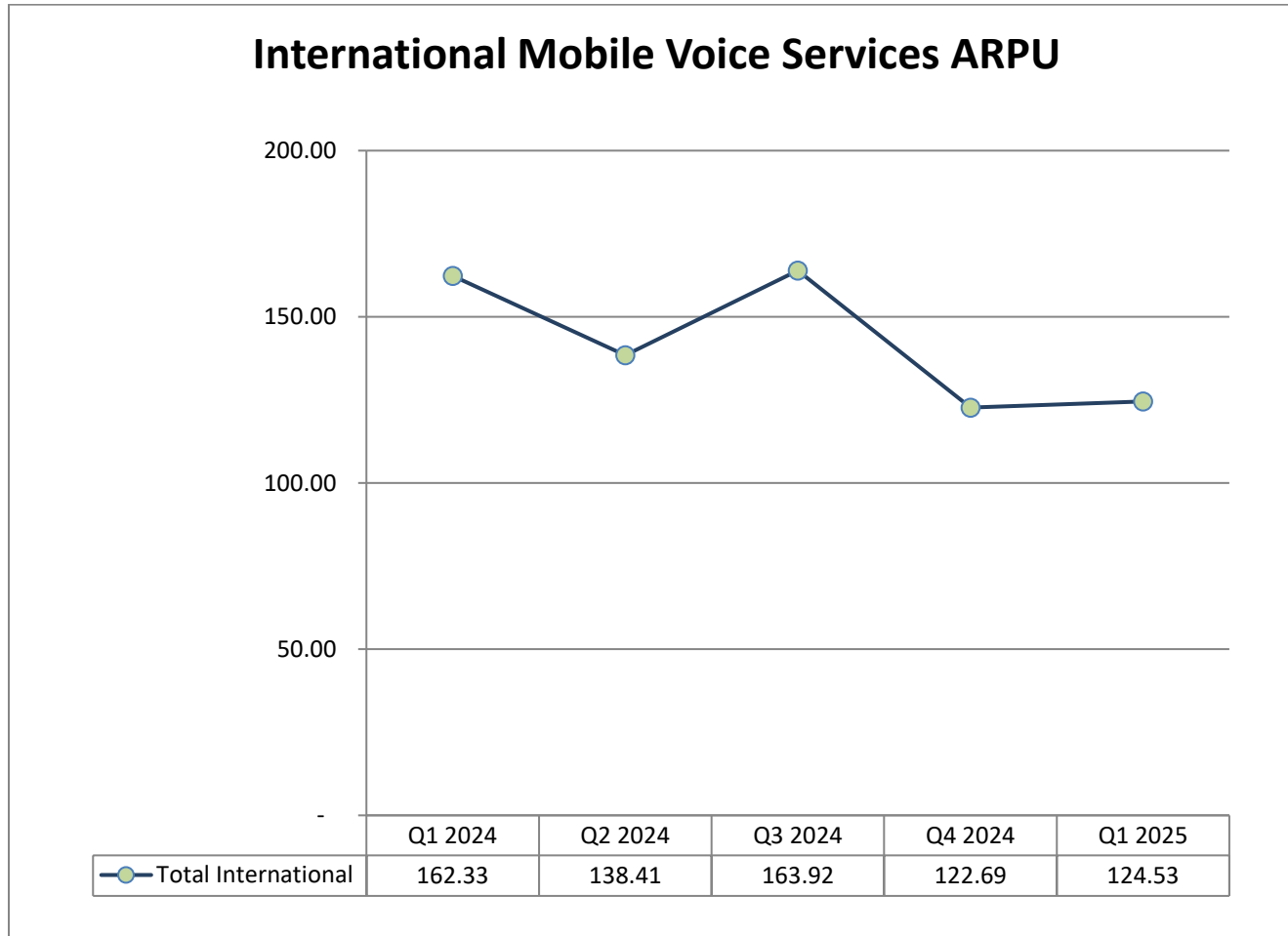


% Change: Q1 '25/Q4 '24

0.96%

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: Q1 '25/Q4 '24

1.50%

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

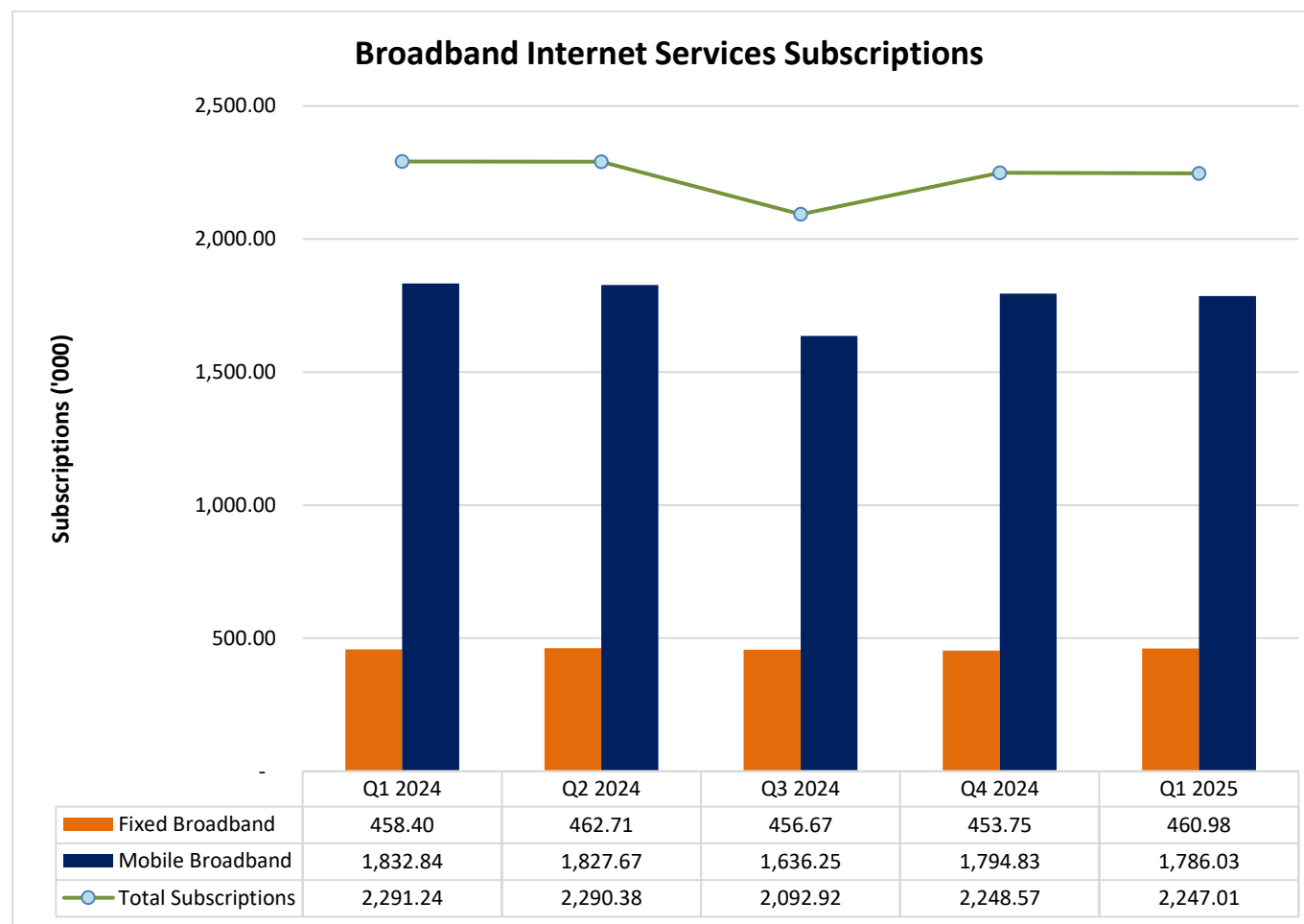


% Change: Q1 '25/Q4 '24

0.41%

Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions



% Change: Q1 '25/Q4 '24

Total Subscriptions:

-0.07%

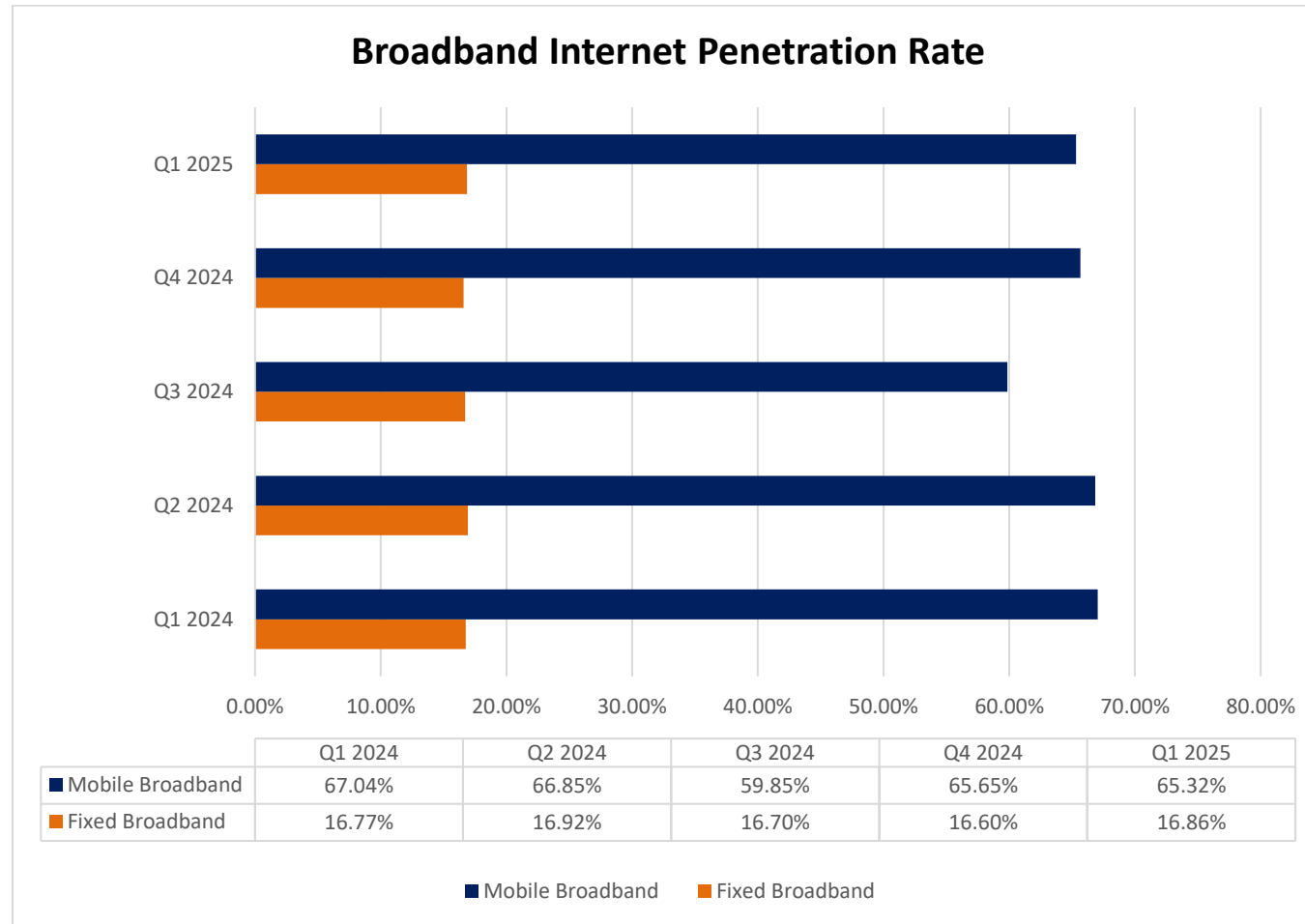
Fixed Broadband:

1.59%

Mobile Broadband:

-0.49%

Figure 16: Broadband Internet Penetration Rate

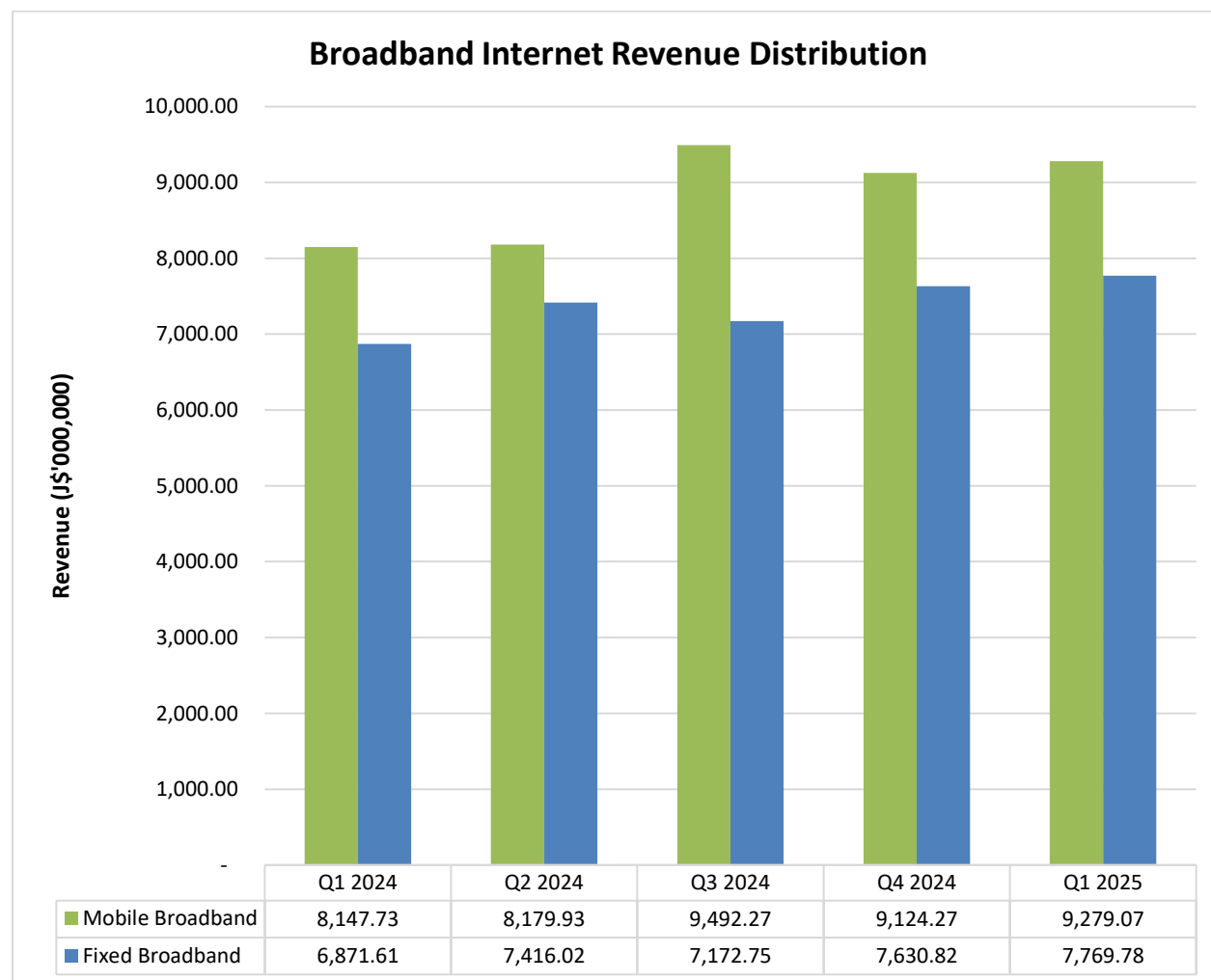


% Change: Q1 '25/Q4 '24

Fixed Broadband:
1.59%

Mobile Broadband:
-0.49%

Figure 17: Broadband Internet Revenue Distribution

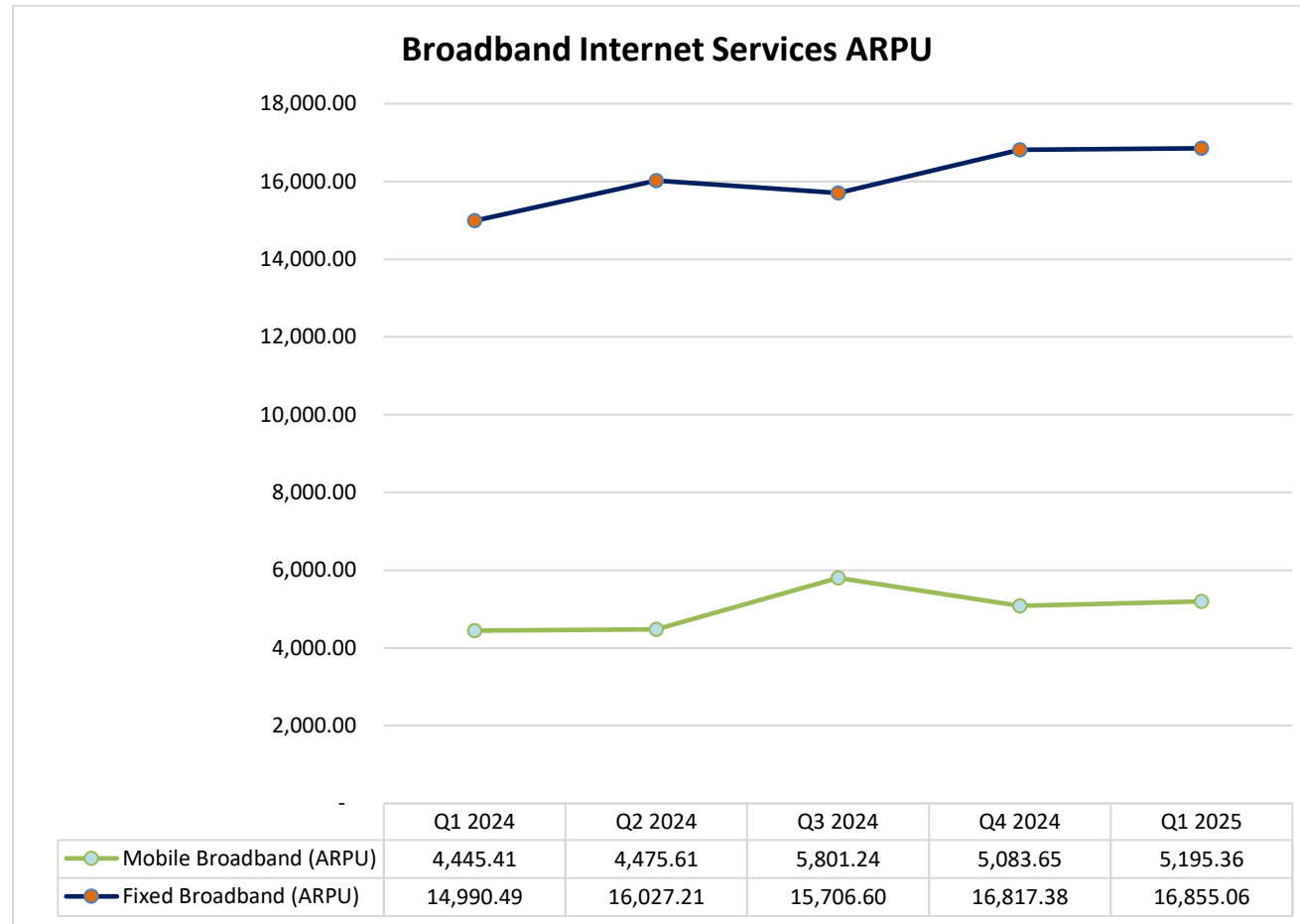


% Change: Q1 '25/Q4 '24

Fixed Broadband:
1.82%

Mobile Broadband:
1.70%

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

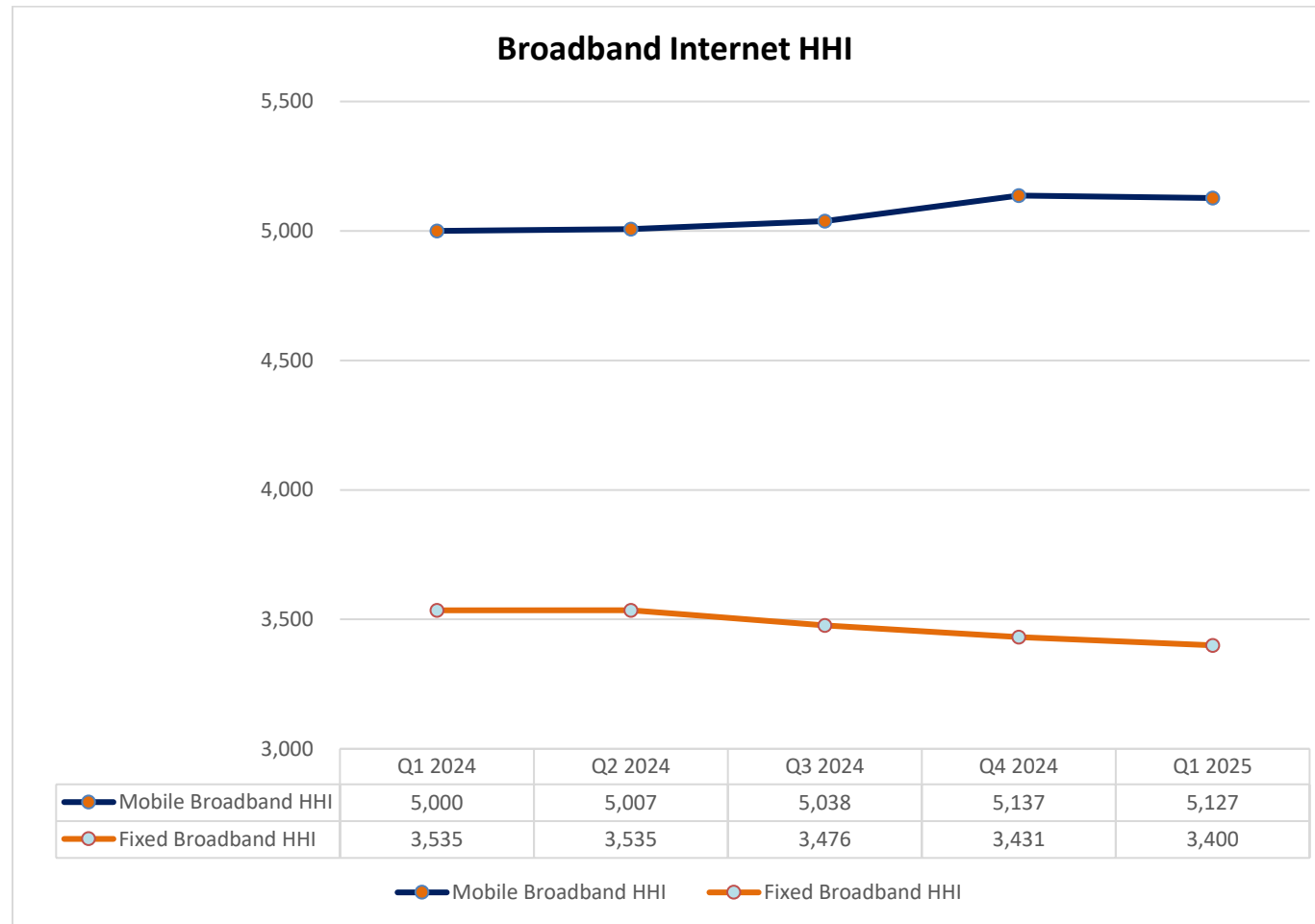


% Change: Q1 '25/Q4 '24

Fixed Broadband:
0.22%

Mobile Broadband:
2.20%

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



% Change: Q1 '25/Q4 '24

Fixed Broadband:

-0.92%

Mobile Broadband:

-0.18%

Industry Penetration and Concentration

Penetration Rate²

Penetration Rate	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Fixed Voice Subscription Penetration Rate	17.02%	17.11%	16.73%	16.60%	16.75%
Mobile Voice Subscription Penetration Rate	121.18%	120.93%	121.49%	122.22%	121.58%
Fixed Broadband Subscription Penetration Rate	16.77%	16.92%	16.70%	16.60%	16.86%
Mobile Broadband Subscription Penetration Rate	67.04%	66.85%	59.85%	65.65%	65.32%
Total Broadband Subscription Penetration Rate	83.80%	83.77%	76.55%	82.25%	82.18%

Concentration Ratio (Herfindahl-Hirschman Index)³

Herfindahl-Hirschman Index (HHI)	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Fixed Voice HHI	4,011	4,009	3,979	3,978	3,994
Mobile Voice HHI	5,182	5,200	5,201	5,201	5,222
Fixed Broadband HHI	3,535	3,535	3,476	3,431	3,400
Mobile Broadband HHI	5,000	5,007	5,038	5,137	5,127

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	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	% Change Q1 '25/Q4 '24	% Change Q1 '25/Q1 '24
Total Subscriptions ('000)	465.29	467.90	457.39	453.88	457.89	0.88	-1.59
Gross Domestic Revenue (J\$' million)	1,127.19	1,119.54	938.87	1,001.55	977.64	-2.39	-13.27
Gross Domestic ARPU	2,422.56	2,392.69	2,052.67	2,206.65	2,135.11	-3.24	-11.87
Gross International Revenue (J\$' million)	134.14	109.84	98.59	83.63	90.40	8.09	-32.61
International ARPU	288.29	234.76	215.54	184.25	197.42	7.15	-31.52

Mobile Voice Services	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	% Change Q1 '25/Q4 '24	% Change Q1 '25/Q1 '24
Total Subscriptions ('000)	3,313.10	3,306.34	3,321.74	3,341.54	3,324.04	-0.52	0.33
Gross Domestic Revenue (J\$' million)	10,656.98	10,300.25	10,472.86	10,543.01	10,570.07	0.26	-0.82
Gross Domestic ARPU	3,216.62	3,115.30	3,152.83	3,155.14	3,179.88	0.78	-1.14
Gross International Revenue (J\$' million)	537.81	457.64	544.50	409.99	413.94	0.96	-23.03
International ARPU	162.33	138.41	163.92	122.69	124.53	1.50	-23.29

Internet Services	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	% Change Q1 '25/Q4 '24	% Change Q1 '25/Q1 '24
Total Subscriptions ('000)	2,291.24	2,290.38	2,092.92	2,248.57	2,247.01	-0.07	-1.93
Fixed Broadband	458.40	462.71	456.67	453.75	460.98	1.59	0.56
Mobile Broadband	1,832.84	1,827.67	1,636.25	1,794.83	1,786.03	-0.49	-2.55
Total Revenue (J\$' million)	15,019.34	15,595.94	16,665.02	16,755.09	17,048.85	1.75	13.51
Total ARPU	6,555.11	6,809.32	7,962.57	7,451.43	7,587.36	1.82	15.75

Penetration Rate	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Fixed Voice Subscription Penetration Rate	17.02%	17.11%	16.73%	16.60%	16.75%
Mobile Voice Subscription Penetration Rate	121.18%	120.93%	121.49%	122.22%	121.58%
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Mobile Broadband Subscription Penetration Rate	67.04%	66.85%	59.85%	65.65%	65.32%
Total Broadband Subscription Penetration Rate	83.80%	83.77%	76.55%	82.25%	82.18%

Herfindahl-Hirschman Index (HHI)	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Fixed Voice HHI	4,011	4,009	3,979	3978	3,994
Mobile Voice HHI	5,182	5,200	5,201	5201	5,222
Fixed Broadband HHI	3,535	3,535	3,476	3,431	3,400
Mobile Broadband HHI	5,000	5,007	5,038	5,137	5,127