
Office of Utilities Regulation

Telecommunications Market Information Report October - December 2025



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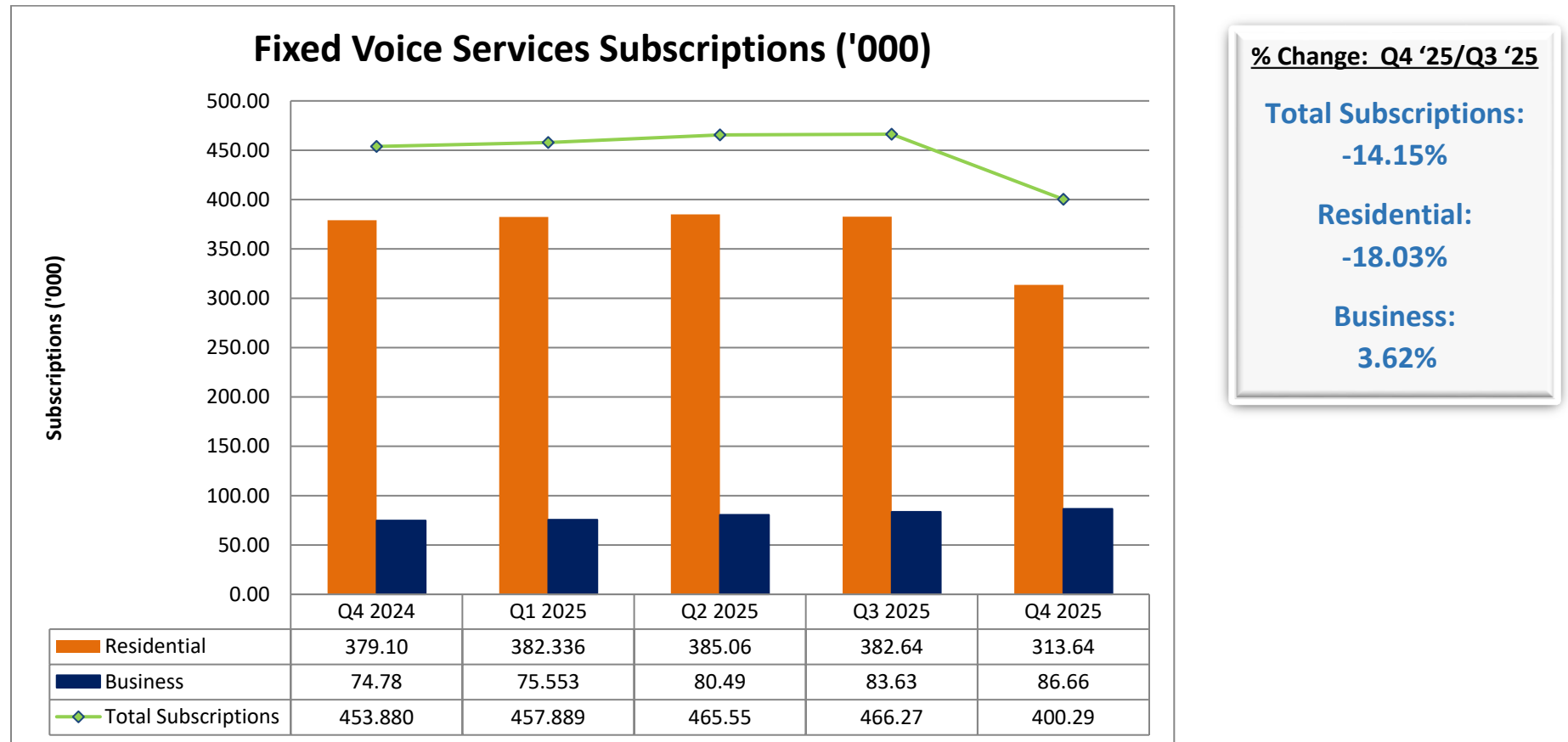
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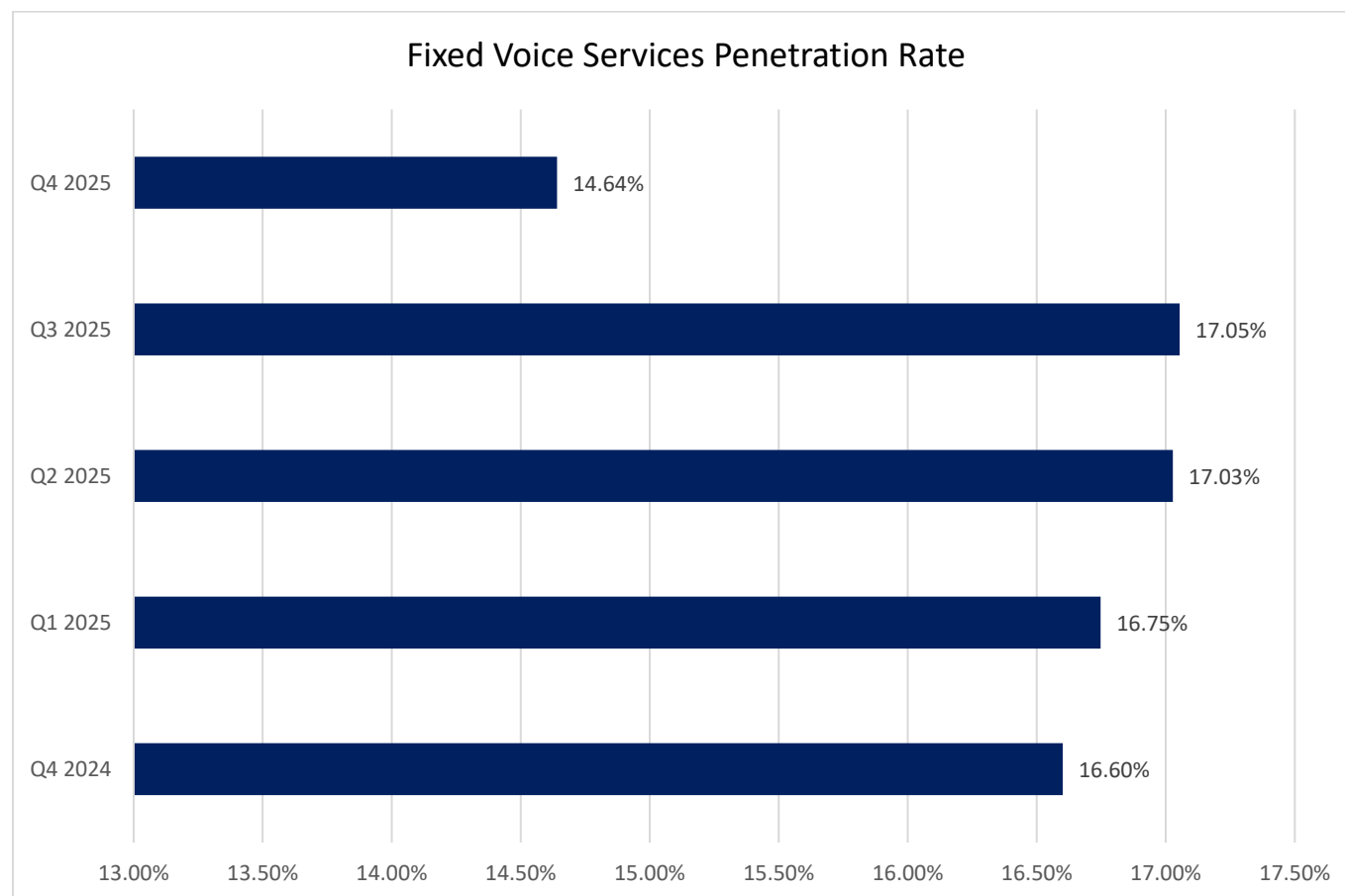
Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions¹



¹ The decline in fixed voice subscriptions was due to the impact of Hurricane Melissa in 2025 October.

Figure 2: Fixed Voice Services Penetration Rate²

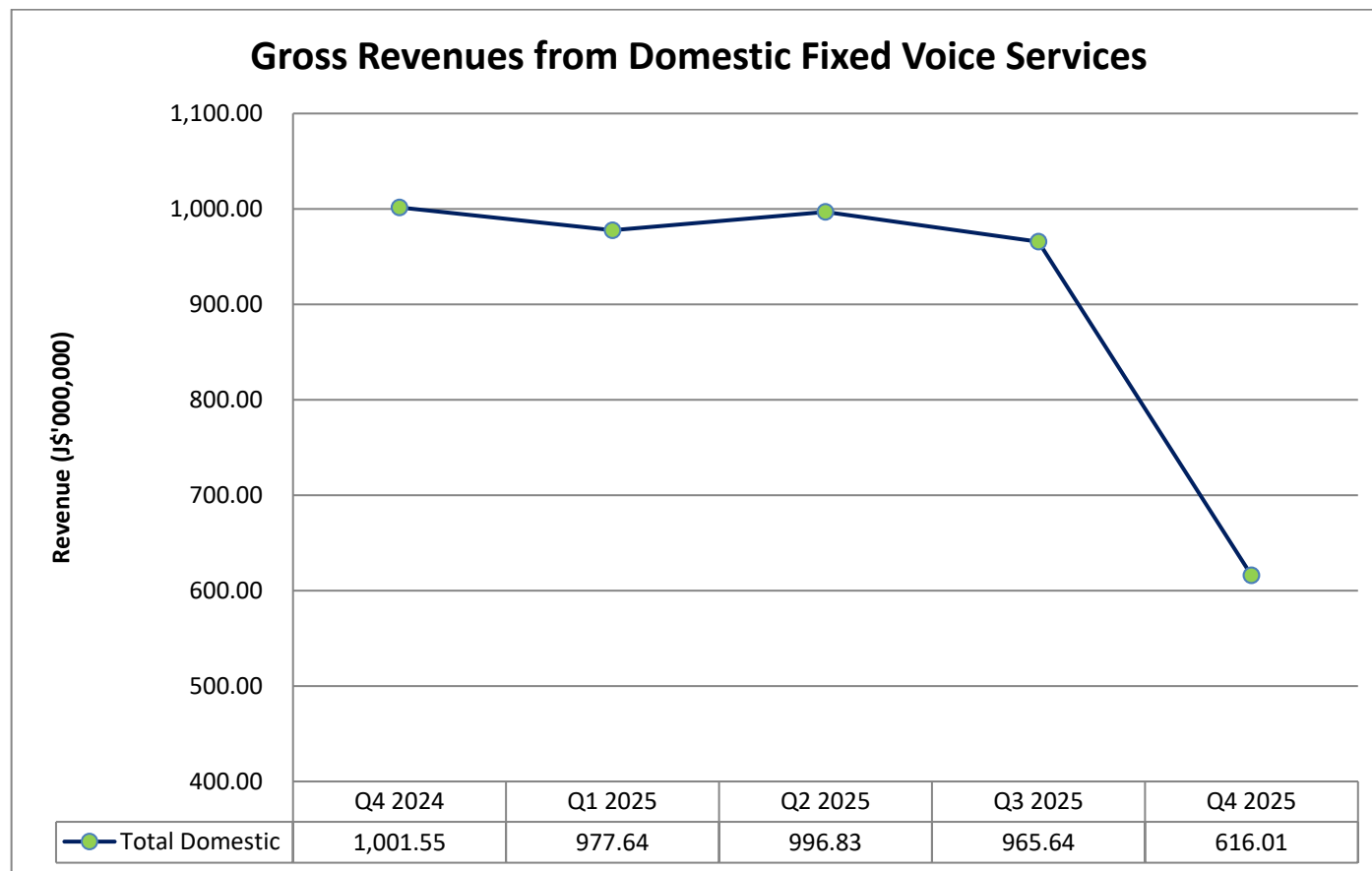


% Change: Q4 '25/Q3 '25

-14.13%

² The decline in fixed voice services penetration rate was due to the reduction in fixed voice subscriptions following Hurricane Melissa in 2025 October.

Figure 3: Gross Revenues from Domestic Fixed Voice Services³

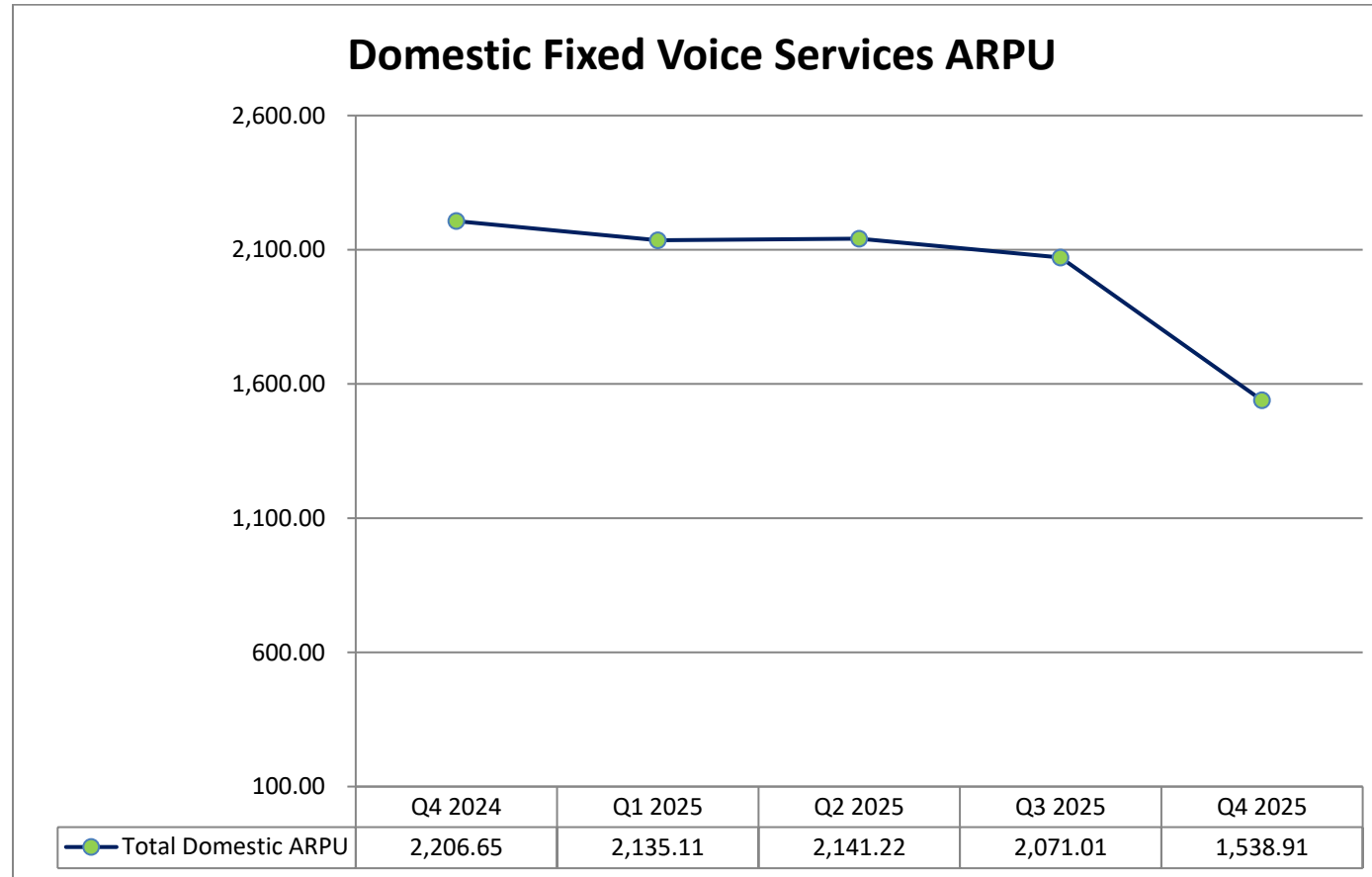


% Change Q4 '25/Q3 '25

-36.21%

³ The sharp decline in gross revenues from domestic fixed voice services was due to the reduction in fixed voice subscriptions following Hurricane Melissa in 2025 October.

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

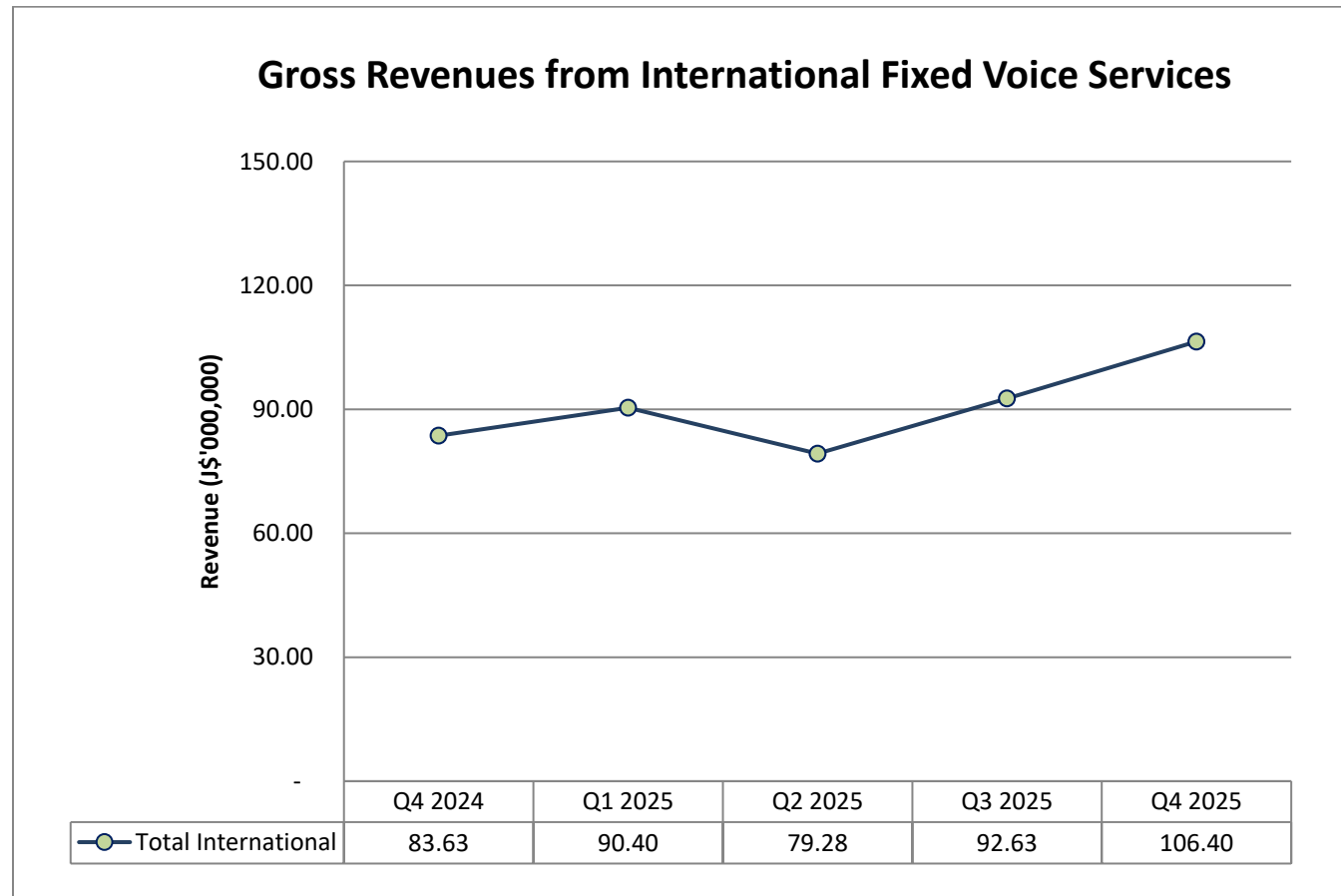


% Change: Q4 '25/Q3 '25

-25.69%

⁴ The sharp decline in domestic fixed voice services ARPU was due to the reduction in fixed voice subscriptions following Hurricane Melissa in 2025 October.

Figure 5: Gross Revenues from International Fixed Voice Services⁵

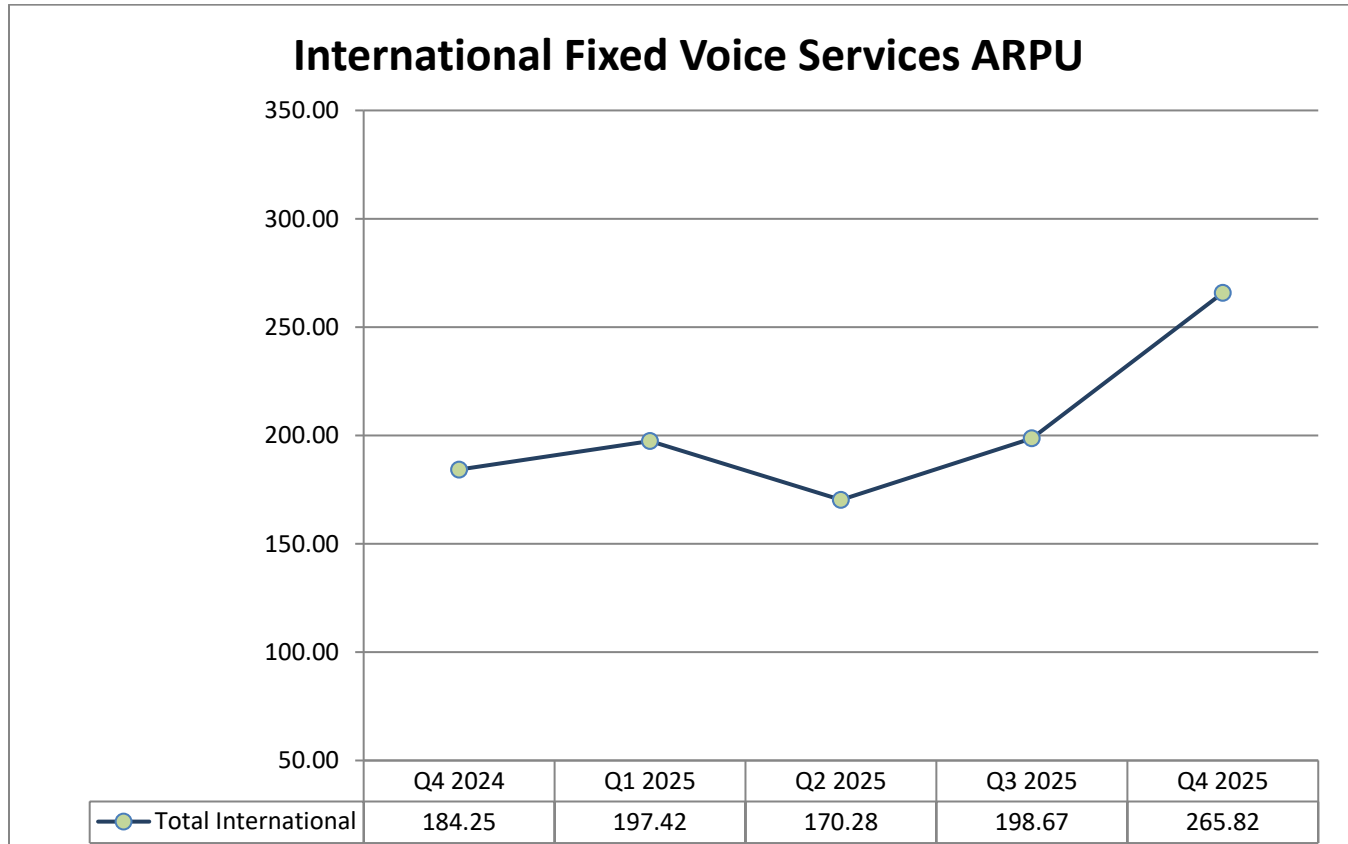


% Change: Q4 '25/Q3 '25

14.87%

⁵ The increase in gross revenues from international fixed voice services was due to increased international calls following Hurricane Melissa in 2025 October.

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

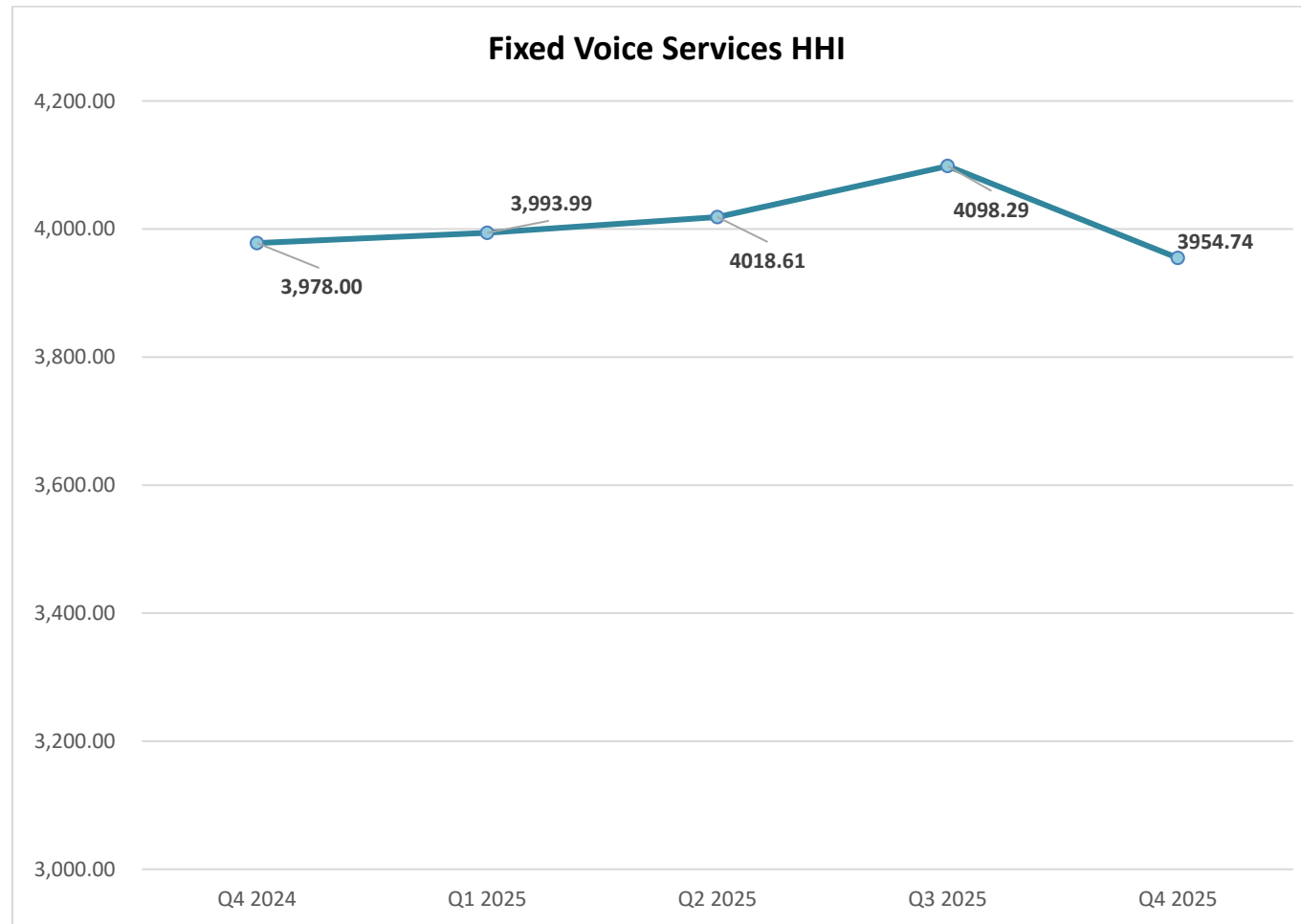


% Change: Q4 '25/Q3 '25

33.80%

⁶ The sharp increase in international fixed voice services ARPU was due to the increase in gross revenues from international fixed voice services following Hurricane Melissa in 2025 October.

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

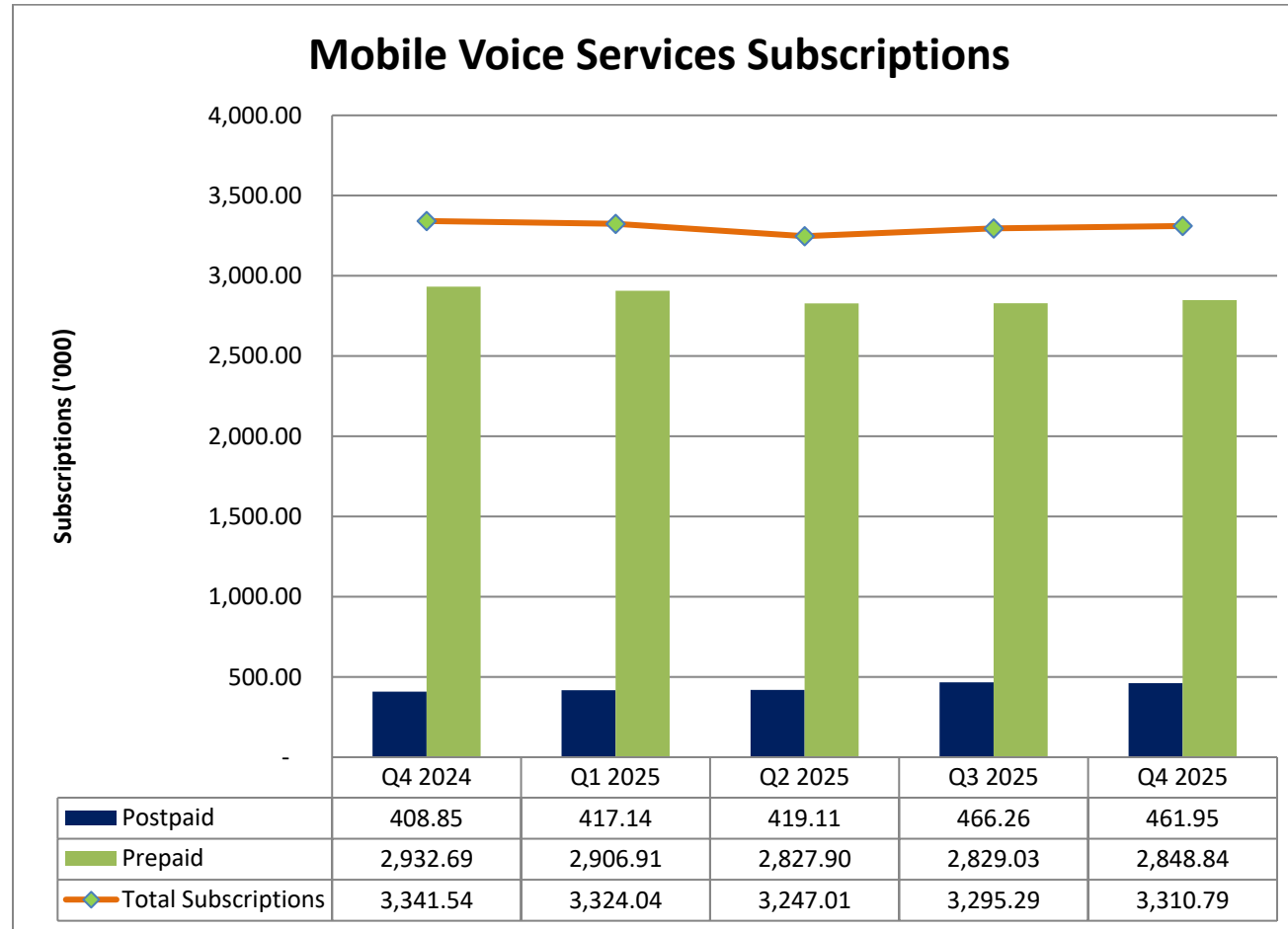


% Change: Q4 '25/Q3 '25

-3.50%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



% Change: Q4 '25/Q3 '25

Total Subscriptions:

0.47%

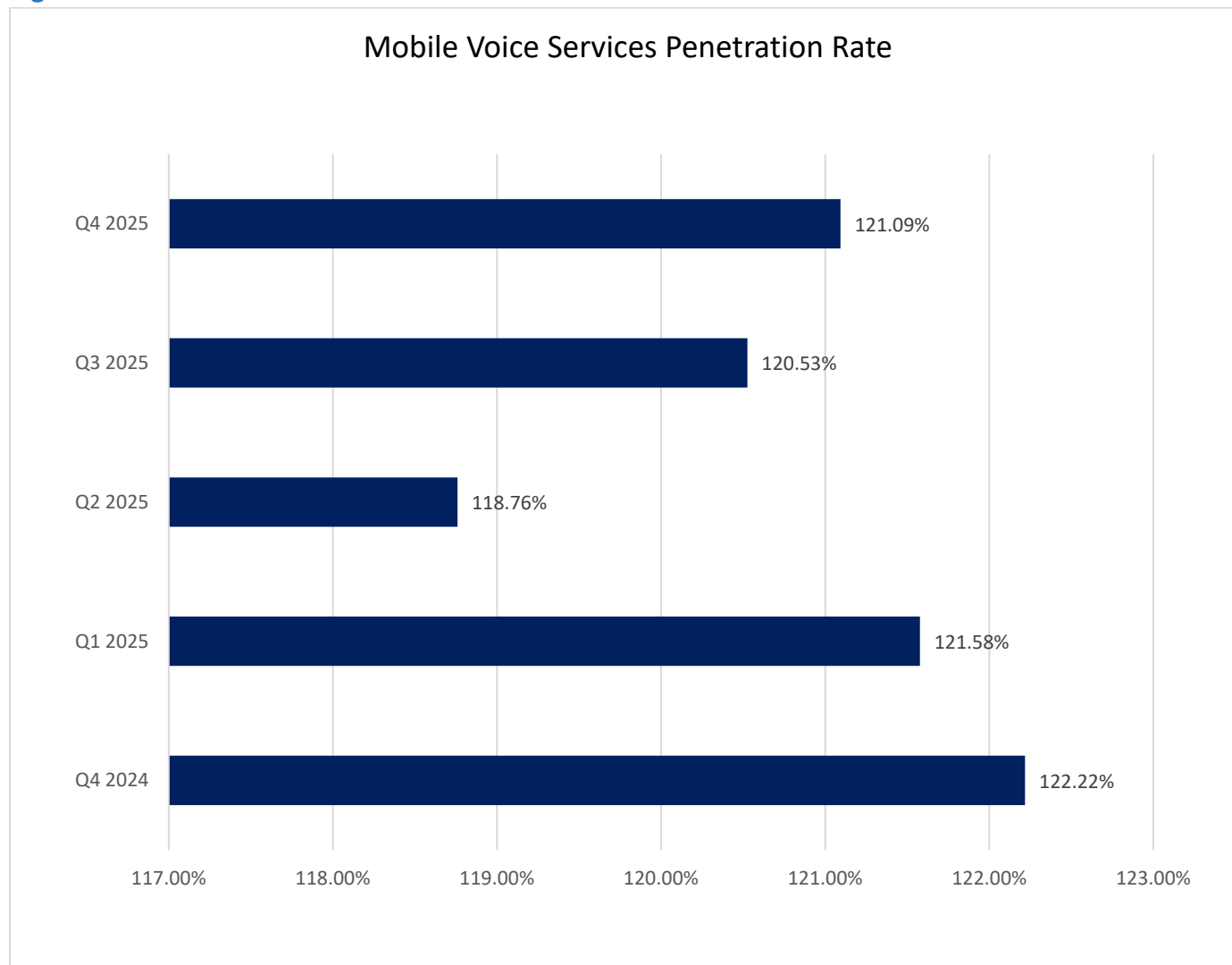
Postpaid:

-0.92%

Prepaid:

0.70%

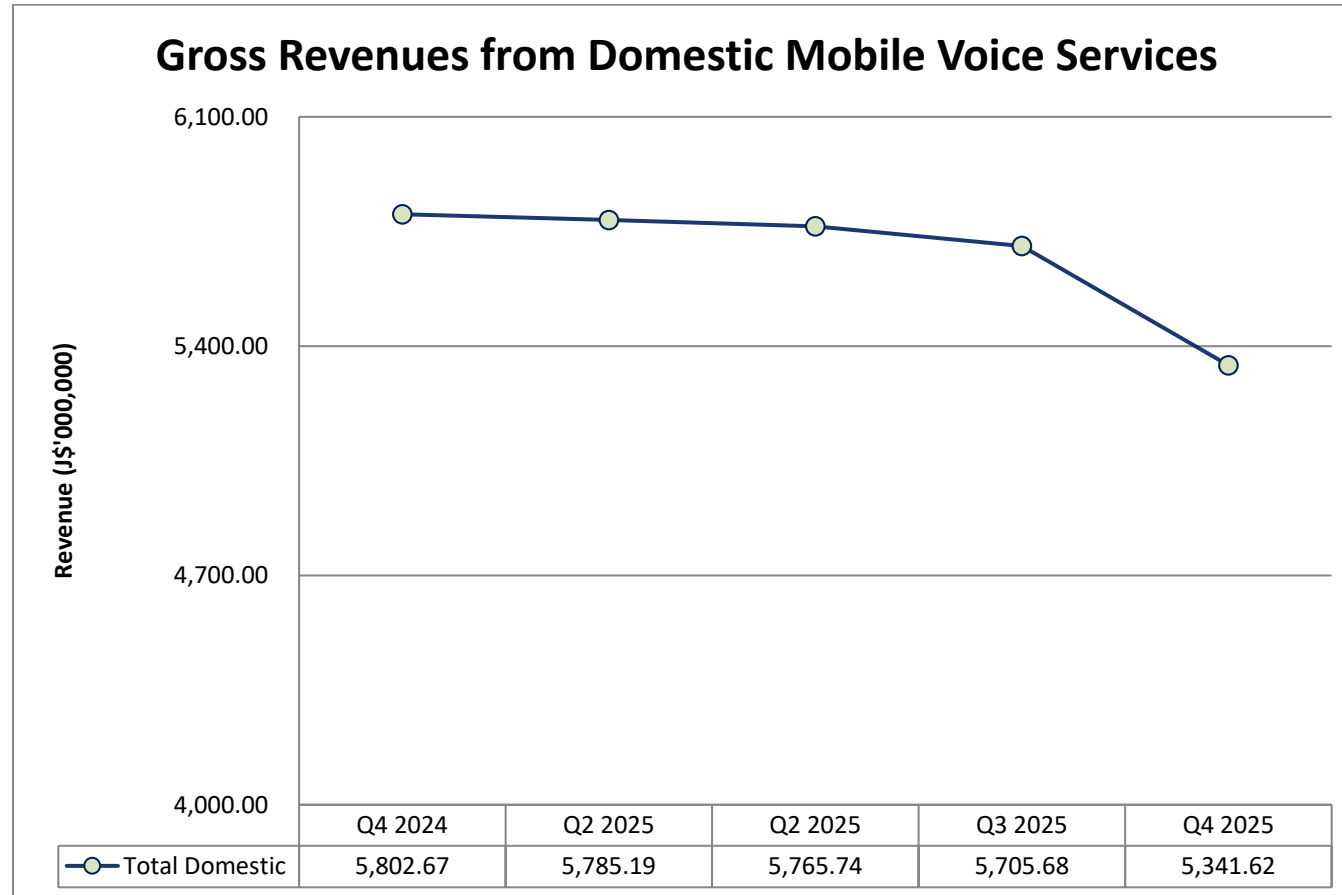
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q4 '25/Q3 '25

0.46%

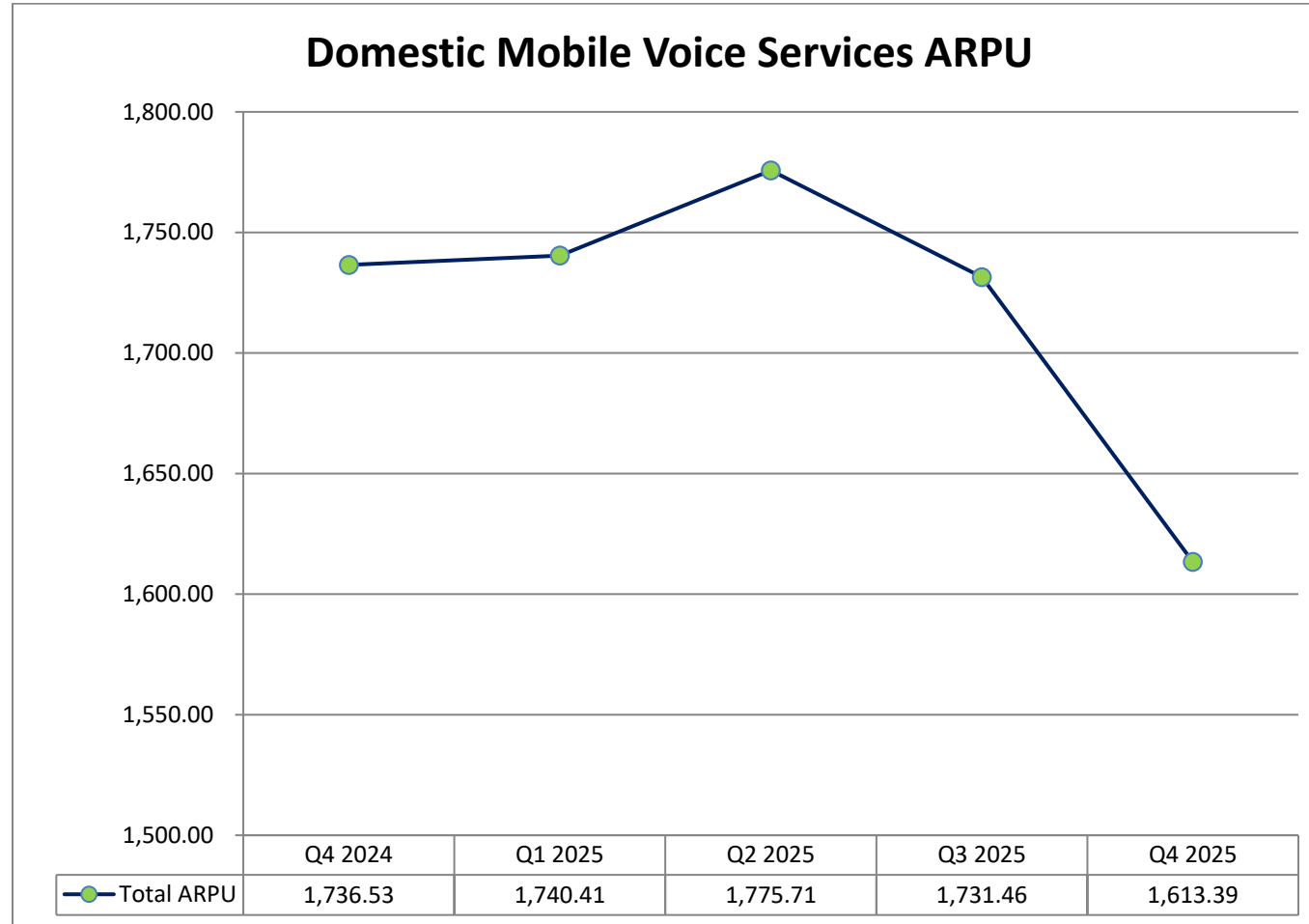
Figure 10: Gross Revenues from Domestic Mobile Voice Services



% Change: Q4 '25/Q3 '25

-6.38%

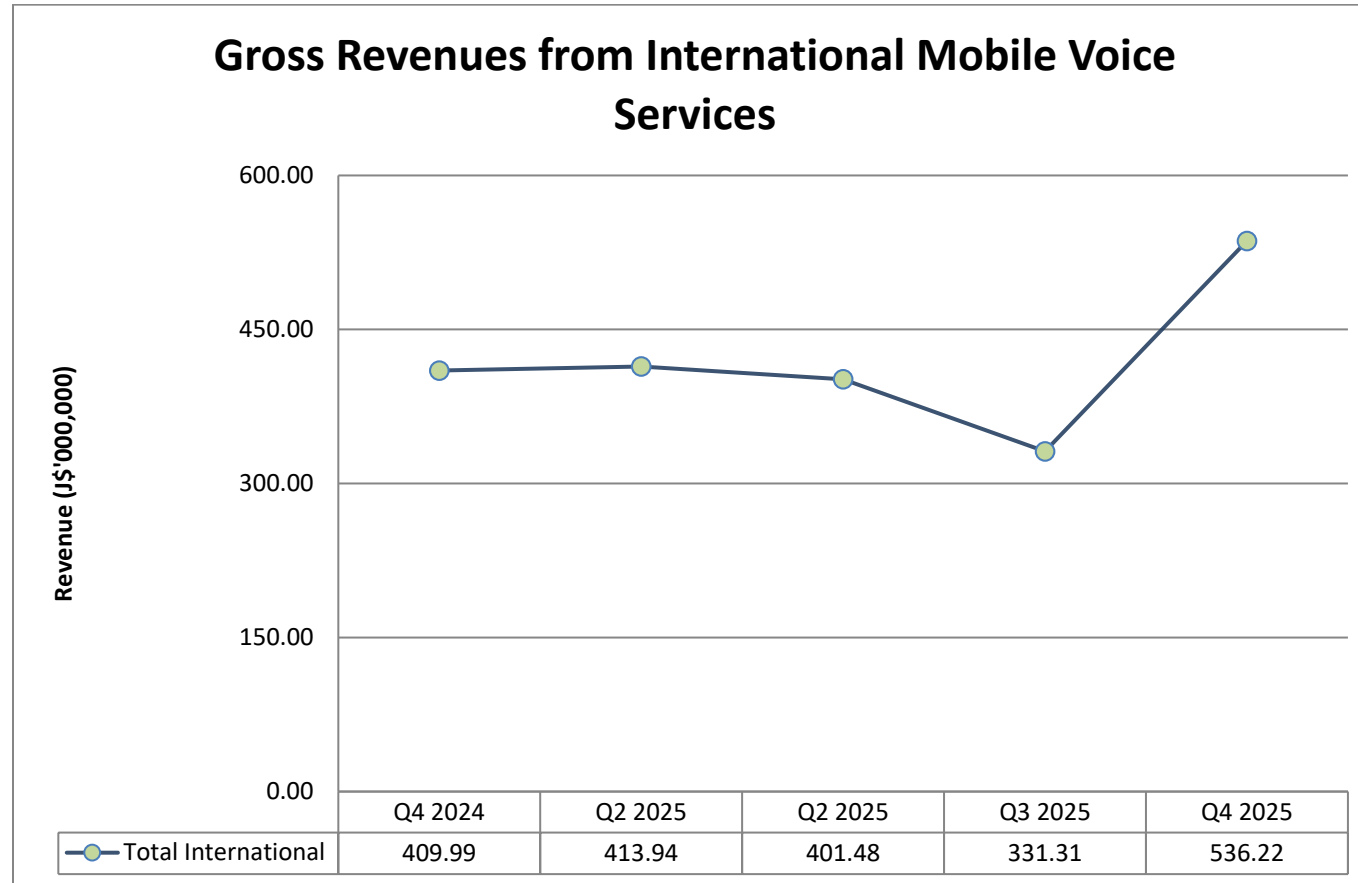
Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q4 '25/Q3 '25

-6.82%

Figure 12: Gross Revenues from International Mobile Voice Services⁷

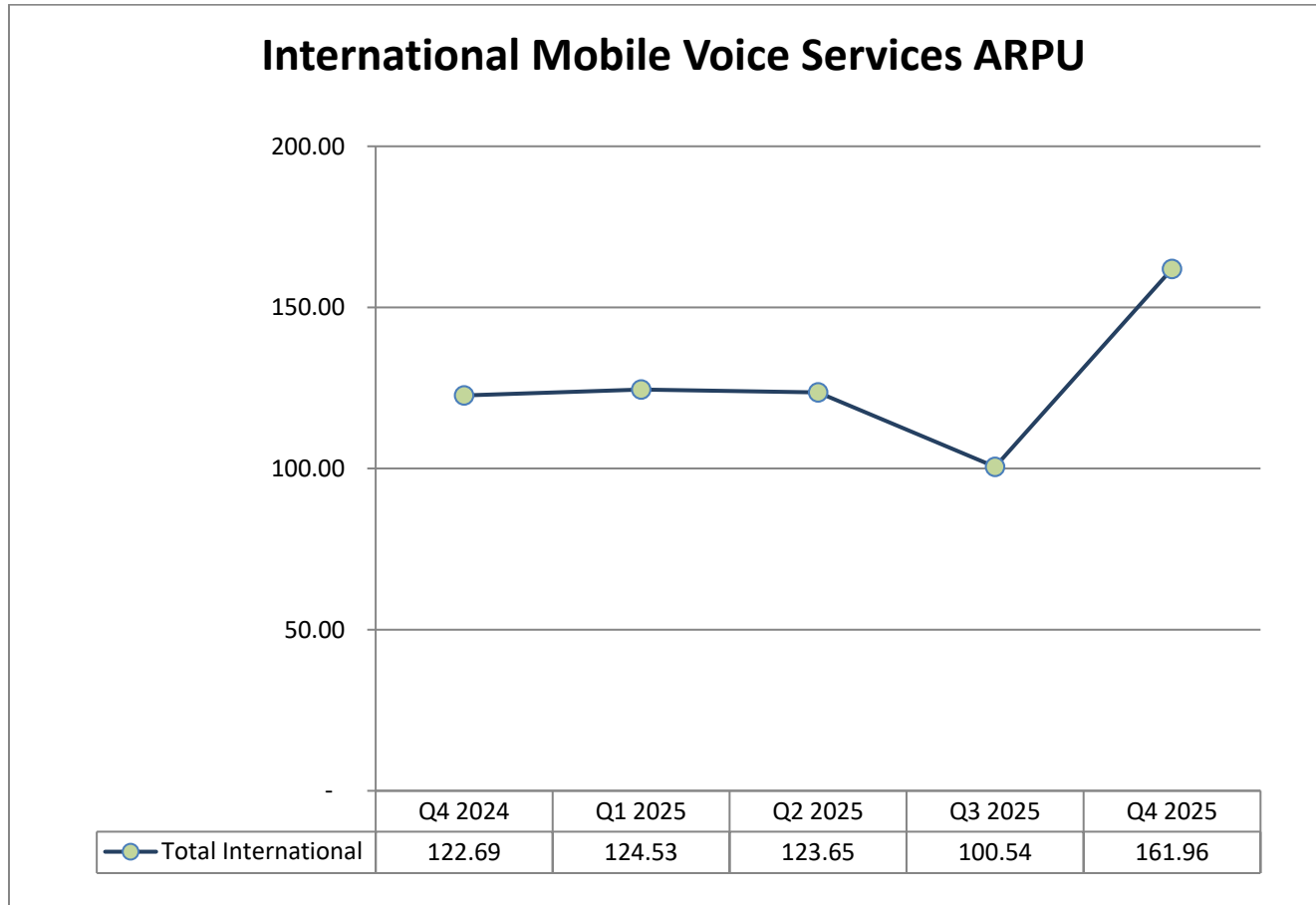


% Change: Q4 '25/Q3 '25

61.85%

⁷ The significant increase in gross revenues from international mobile voice services was due to increased international calls following Hurricane Melissa in 2025 October.

Figure 13: International Mobile Voice Services Average Revenue per User (ARPU)⁸

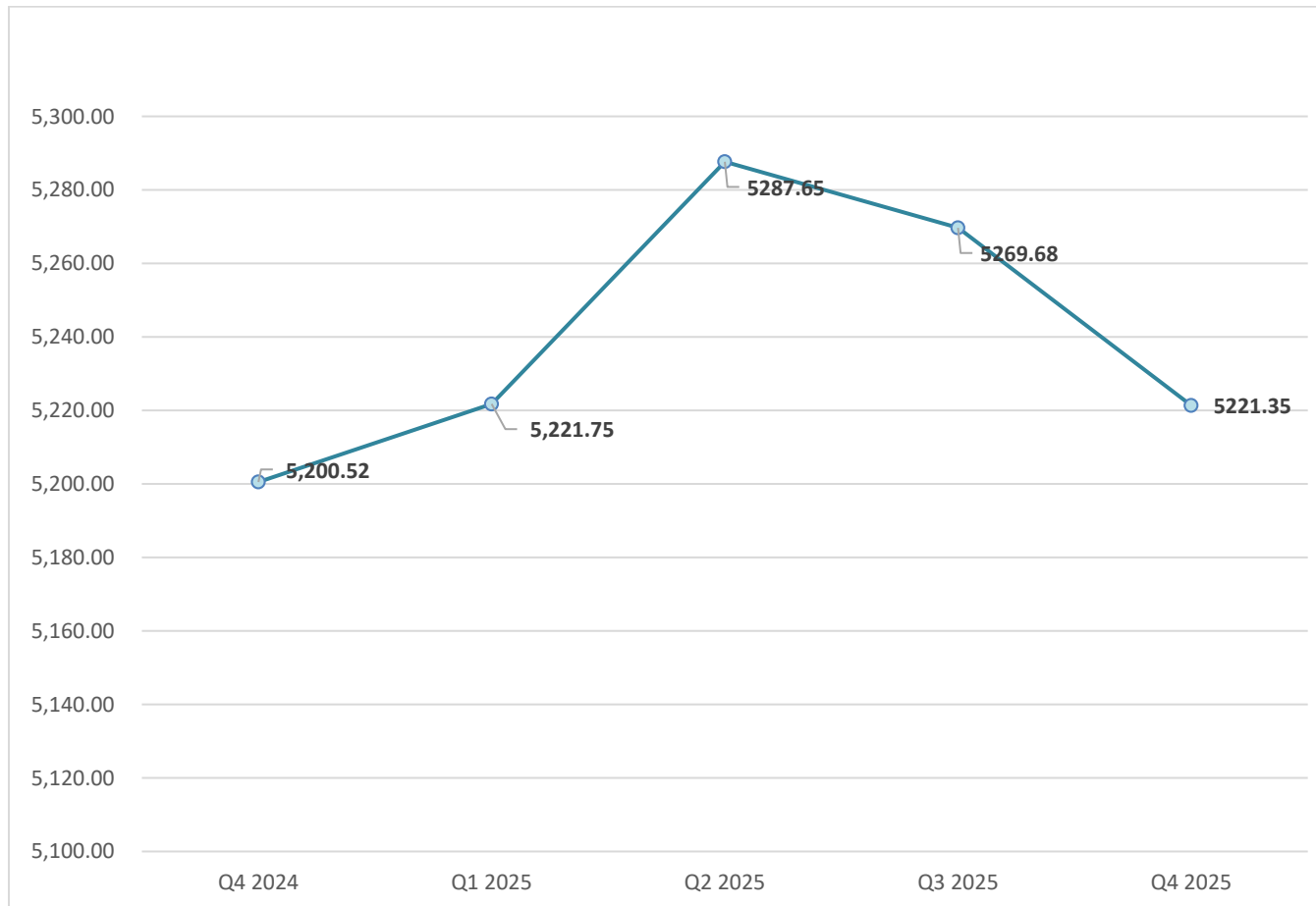


% Change: Q4 '25/Q3 '25

61.09%

⁸ The significant increase in international mobile voice services ARPU was due to the increase in gross revenues from international mobile voice services following Hurricane Melissa in 2025 October.

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

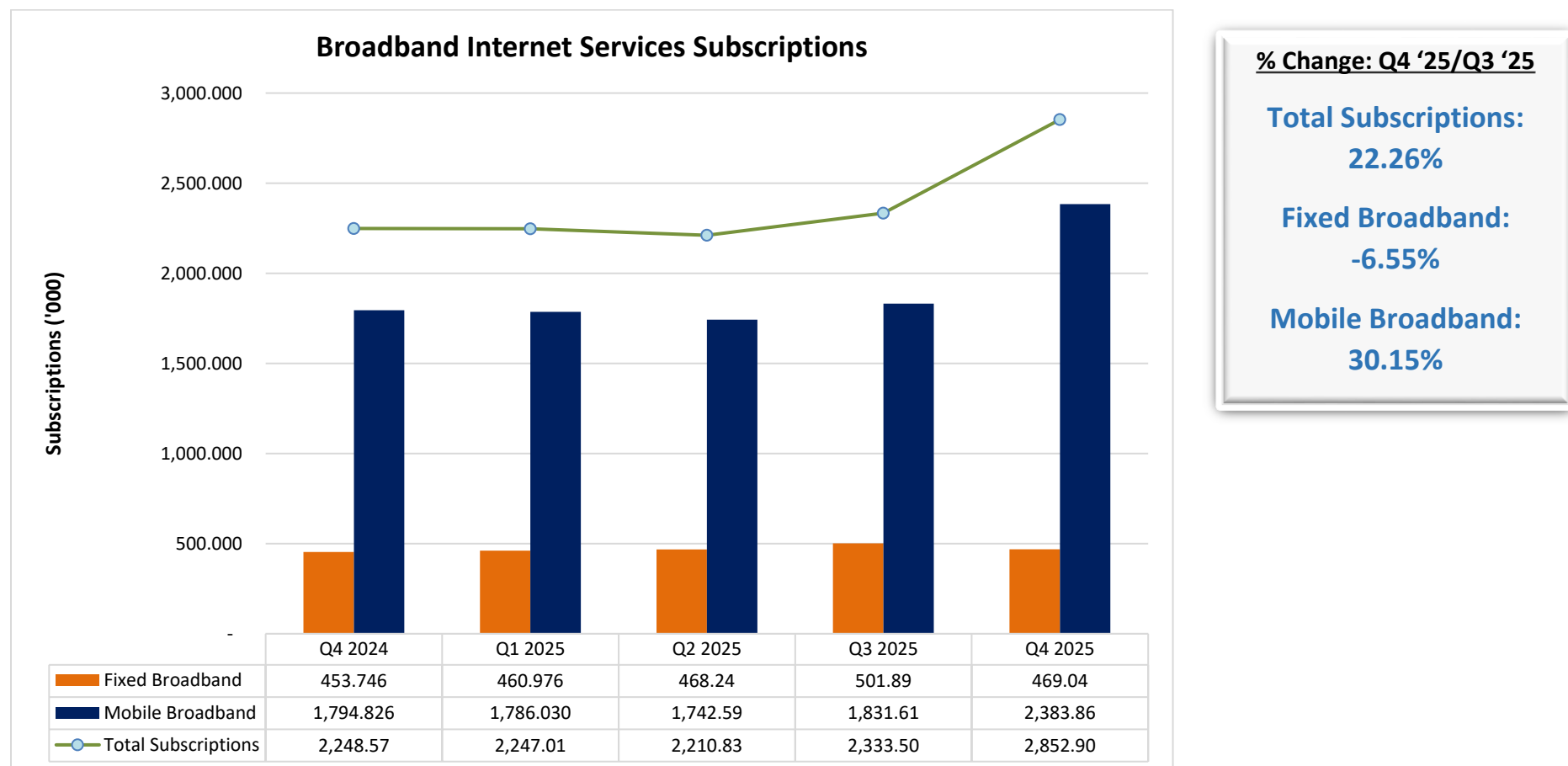


% Change: Q4 '25/Q3 '25

-0.92%

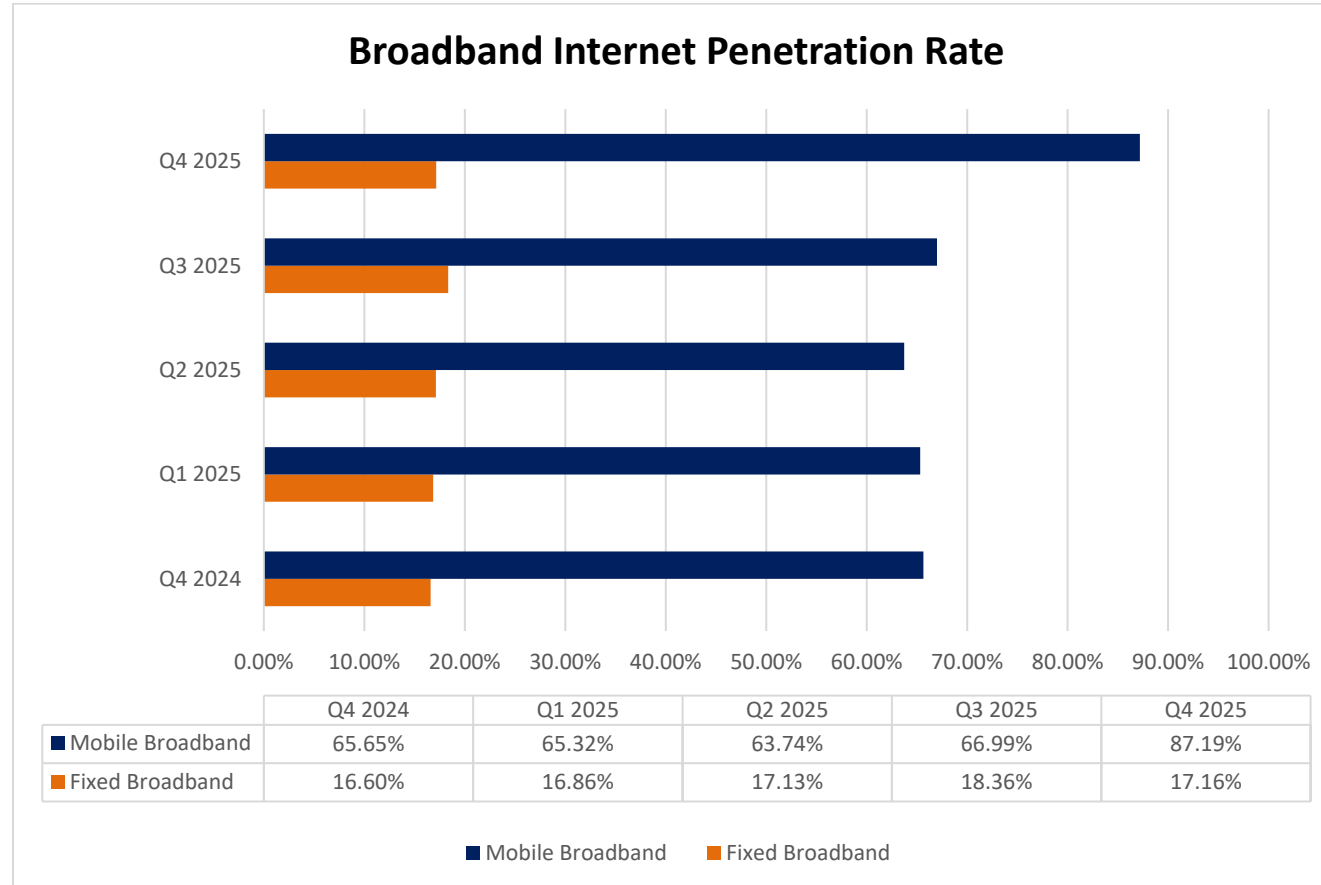
Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions⁹



⁹ The significant increase in mobile broadband subscriptions was due to subscribers shifting from voice-only subscriptions to data and voice subscriptions.

Figure 16: Broadband Internet Penetration Rate¹⁰



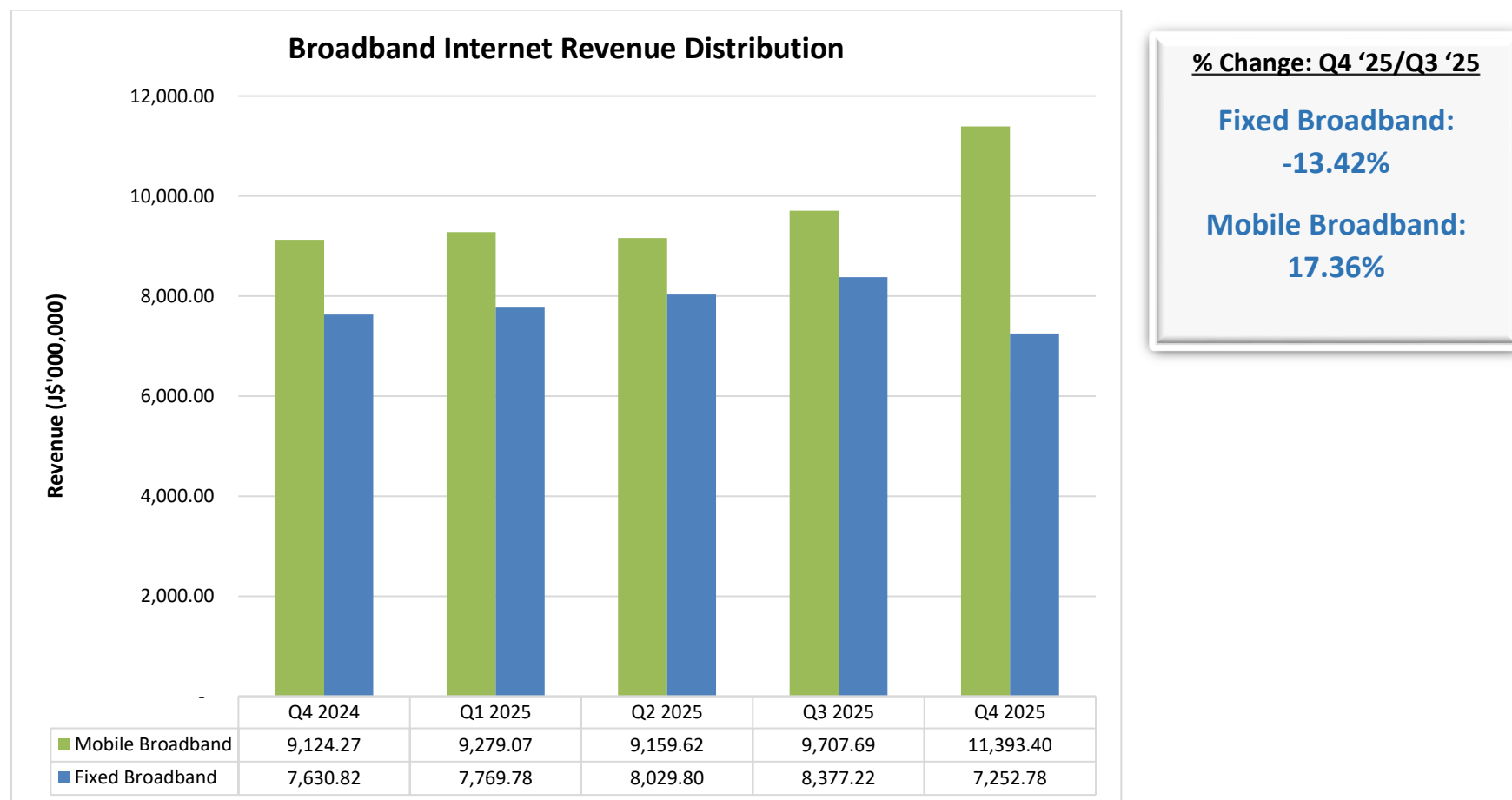
% Change: Q4 '25/Q3 '25

Fixed Broadband:
6.54%

Mobile Broadband:
30.15%

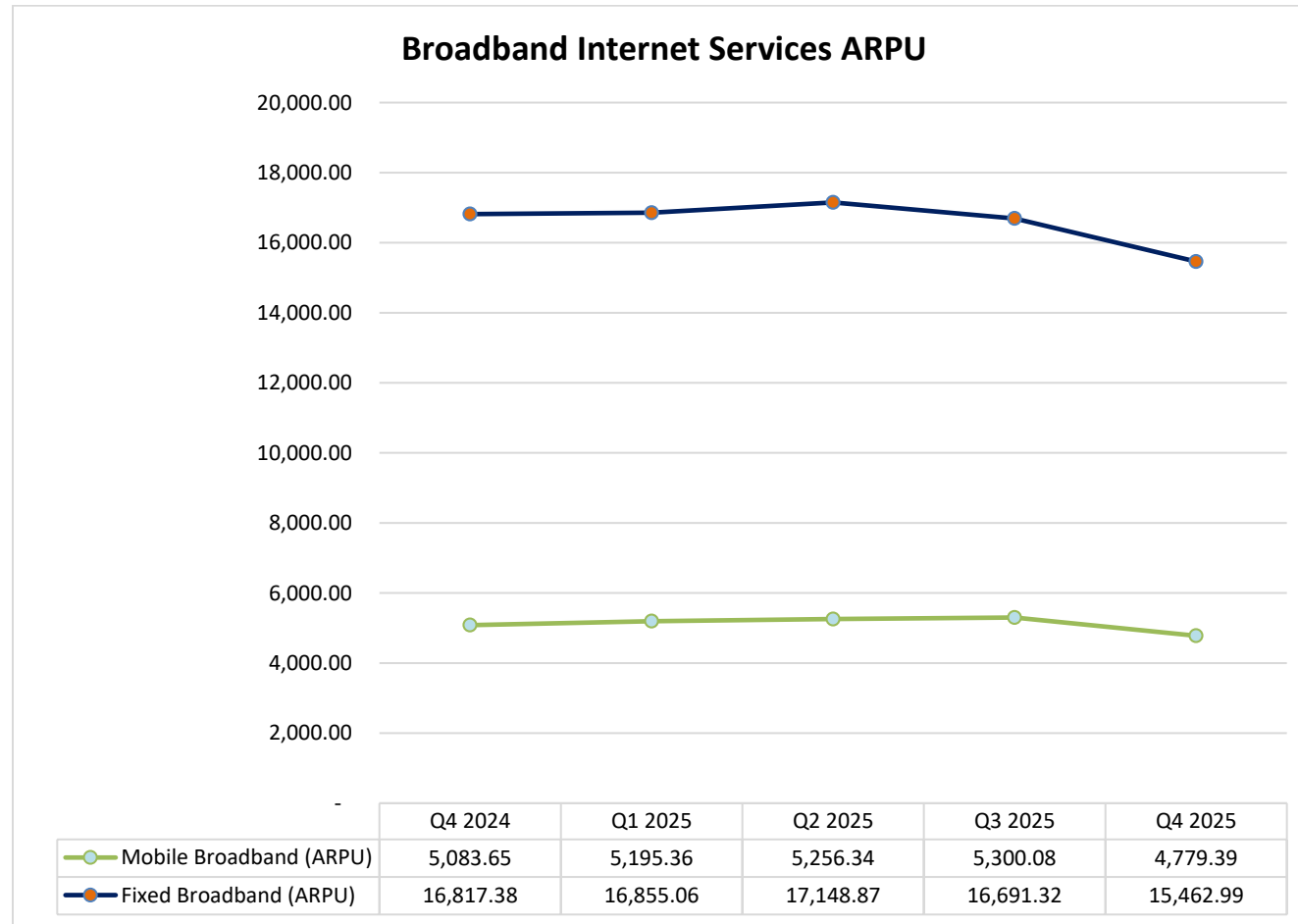
¹⁰ The significant increase in mobile broadband internet penetration rate was due to the increase in mobile broadband subscriptions.

Figure 17: Broadband Internet Revenue Distribution¹¹



¹¹ The increase in mobile broadband internet revenues was due to the increase in mobile broadband subscriptions.

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



% Change: Q4 '25/Q3 '25

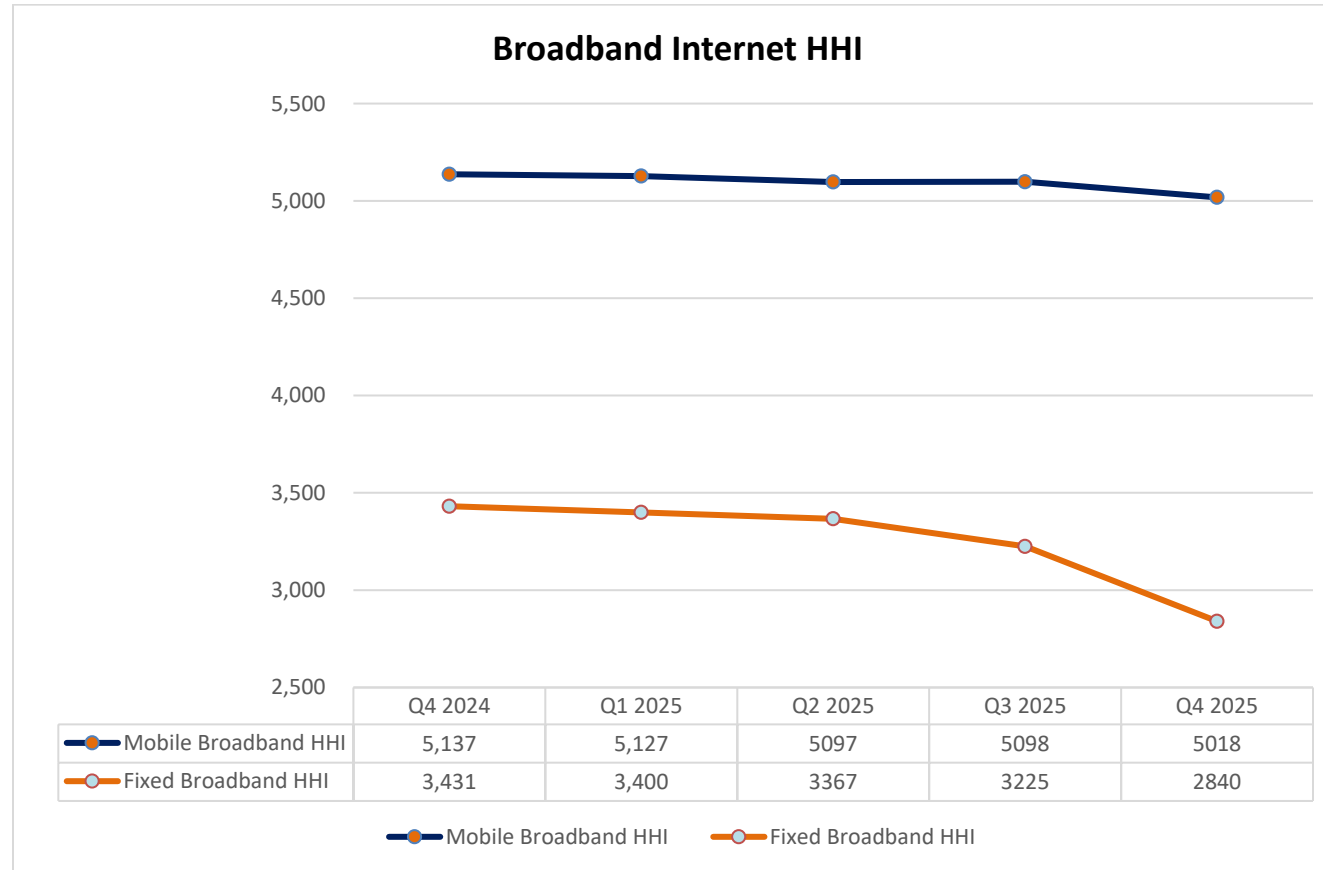
Fixed Broadband:

-7.36%

Mobile Broadband:

-9.82%

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



% Change: Q4 '25/Q3 '25

Fixed Broadband:

-11.94%

Mobile Broadband:

-1.57%

Industry Penetration and Concentration

Penetration Rate¹²

Penetration Rate	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Fixed Voice Subscription Penetration Rate	16.60%	16.75%	17.03%	17.05%	14.64%
Mobile Voice Subscription Penetration Rate	122.22%	121.58%	118.76%	120.53%	121.09%
Fixed Broadband Subscription Penetration Rate	16.60%	16.86%	17.13%	18.36%	17.16%
Mobile Broadband Subscription Penetration Rate	65.65%	65.32%	63.74%	66.99%	87.19%
Total Broadband Subscription Penetration Rate	82.25%	82.18%	80.86%	85.35%	104.35%

Concentration Ratio (Herfindahl-Hirschman Index)¹³

Herfindahl-Hirschman Index (HHI)	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Fixed Voice HHI	3,978	3,994	4,019	4,098	3,955
Mobile Voice HHI	5,201	5,222	5,288	5,270	5,221
Fixed Broadband HHI	3,431	3,400	3,367	3,225	2,840
Mobile Broadband HHI	5,137	5,127	5,097	5,098	5,018

¹² Calculated using population year-end 2019 data from the Statistical Institute of Jamaica: 2,734,092.

¹³ Calculated using subscription data.

Appendix

Fixed Voice Services	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	% Change Q4 '25/Q3 '25	% Change Q4 '25/Q4 '24
Total Subscriptions ('000)	453.88	457.89	465.55	466.27	400.29	-14.15	-11.81
Gross Domestic Revenue (J\$' million)	1,001.55	977.64	996.83	965.64	616.01	-36.21	-38.49
Gross Domestic ARPU	2,206.65	2,135.11	2,141.22	2,071.01	1,538.91	-25.69	-30.26
Gross International Revenue (J\$' million)	83.63	90.40	79.28	92.63	106.40	14.87	27.23
International ARPU	184.25	197.42	170.28	198.67	265.82	33.80	44.27

Mobile Voice Services	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	% Change Q4 '25/Q3 '25	% Change Q4 '25/Q4 '24
Total Subscriptions ('000)	3,341.54	3,324.04	3,247.01	3,295.29	3,310.79	0.47	-0.92
Gross Domestic Revenue (J\$' million)	5,802.67	5,785.19	5,765.74	5,705.68	5,341.62	-6.38	-7.95
Gross Domestic ARPU	1,736.53	1,740.41	1,775.71	1,731.46	1,613.39	-6.82	-7.09
Gross International Revenue (J\$' million)	409.99	413.94	401.48	331.31	536.22	61.85	30.79
International ARPU	122.69	124.53	123.65	100.54	161.96	61.09	32.00

Internet Services	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	% Change Q4 '25/Q3 '25	% Change Q4 '25/Q4 '24
Total Subscriptions ('000)	2,248.57	2,247.01	2,210.83	2,333.50	2,852.90	22.26	26.88
Fixed Broadband	453.75	460.98	468.24	501.89	469.04	-6.55	3.37
Mobile Broadband	1,794.83	1,786.03	1,742.59	1,831.61	2,383.86	30.15	32.82
Total Revenue (J\$' million)	16,755.09	17,048.85	17,189.42	18,084.91	18,646.18	3.10	11.29
Total ARPU	7,451.43	7,587.36	7,775.11	7,750.11	6,535.87	-15.67	-12.29

Penetration Rate	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
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