Office of Utilities Regulation

Telecommunications Market Information Report

April - June 2026

OFFICE OF UTILITIES REGULATION

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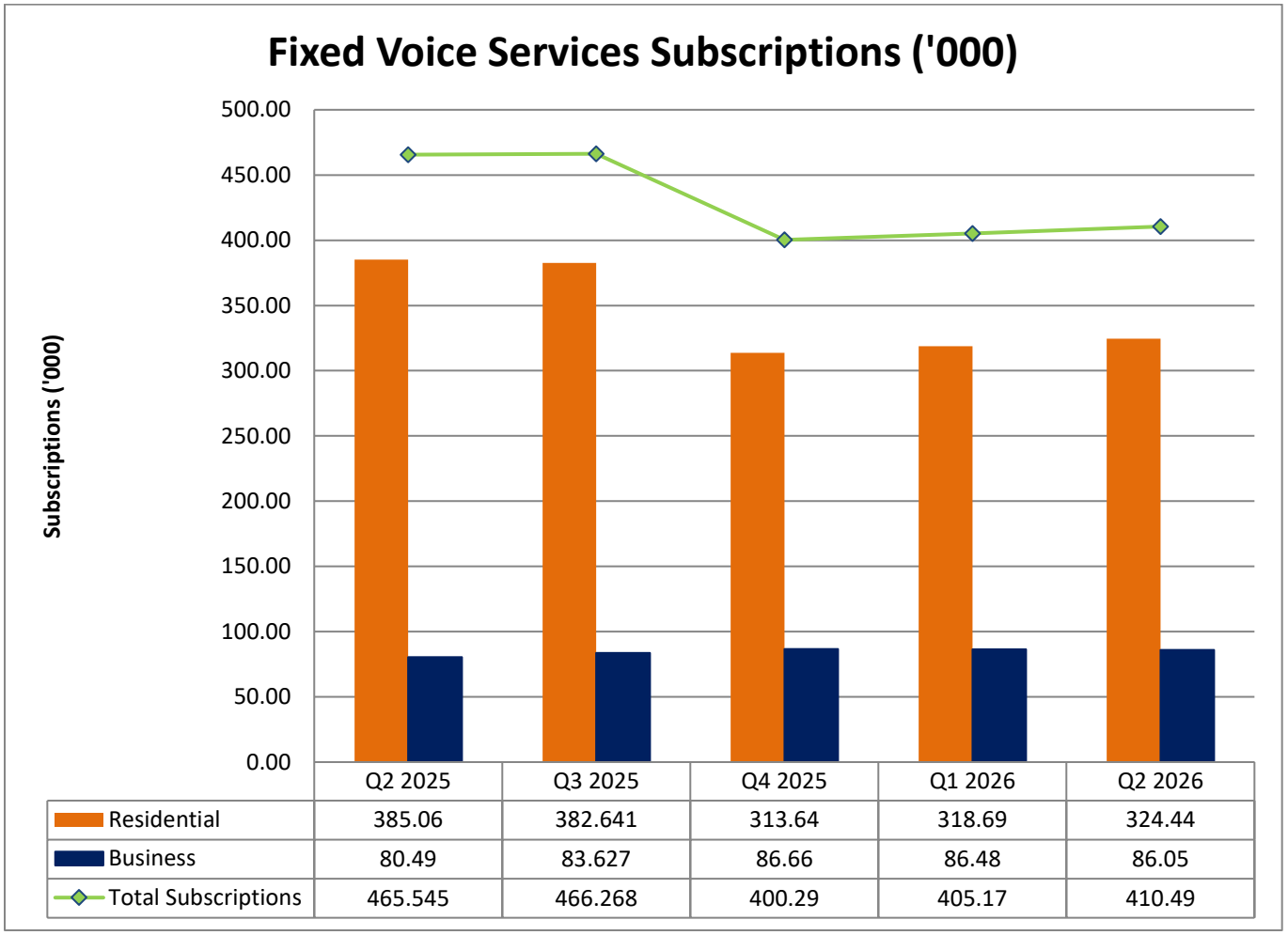
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Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions



	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Residential	385.06	382.641	313.64	318.69	324.44
Business	80.49	83.627	86.66	86.48	86.05
Total Subscriptions	465.545	466.268	400.29	405.17	410.49

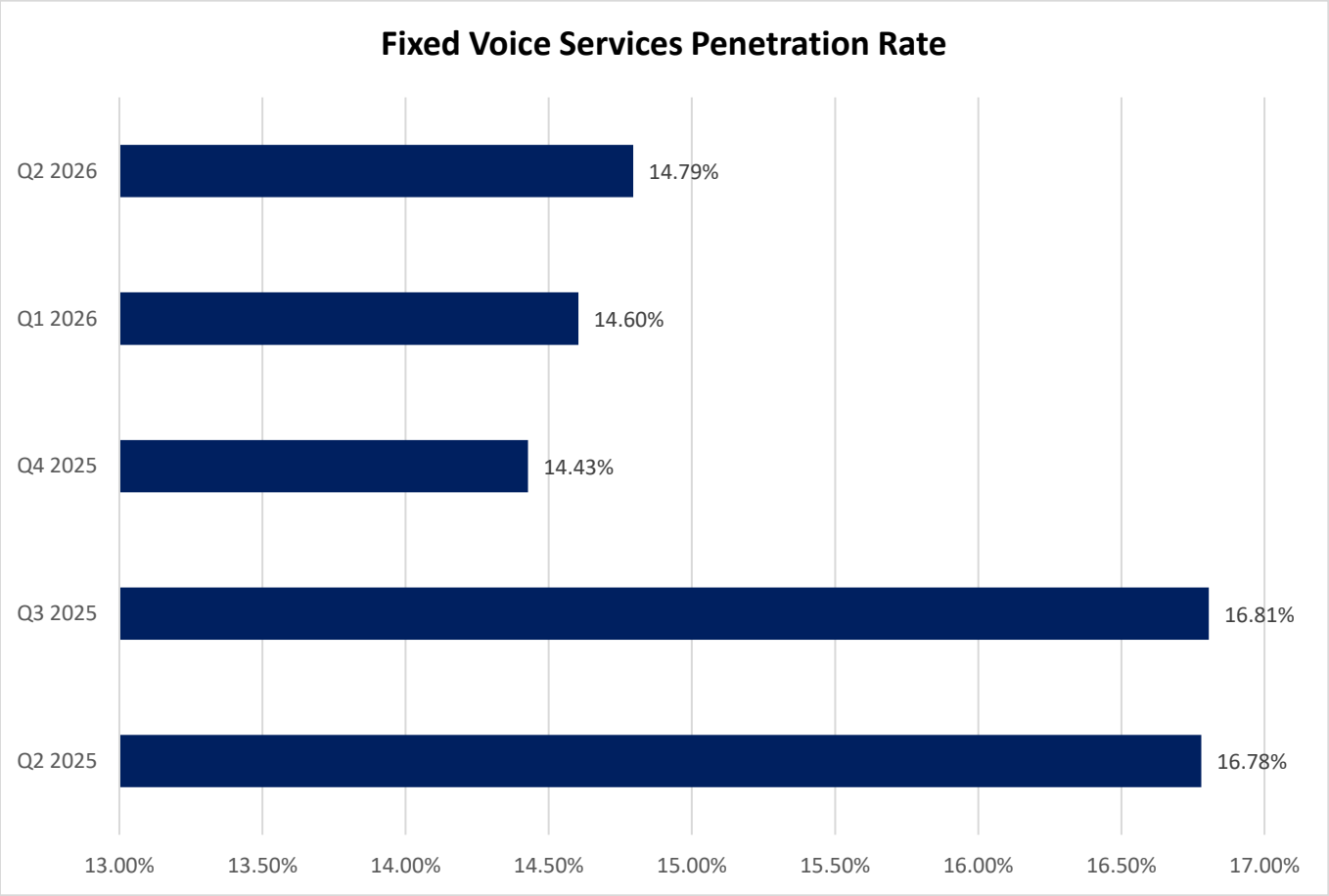
% Change: Q2 '26/Q1 '26

Total Subscriptions: 1.31%

Residential: 1.80%

Business: -0.50%

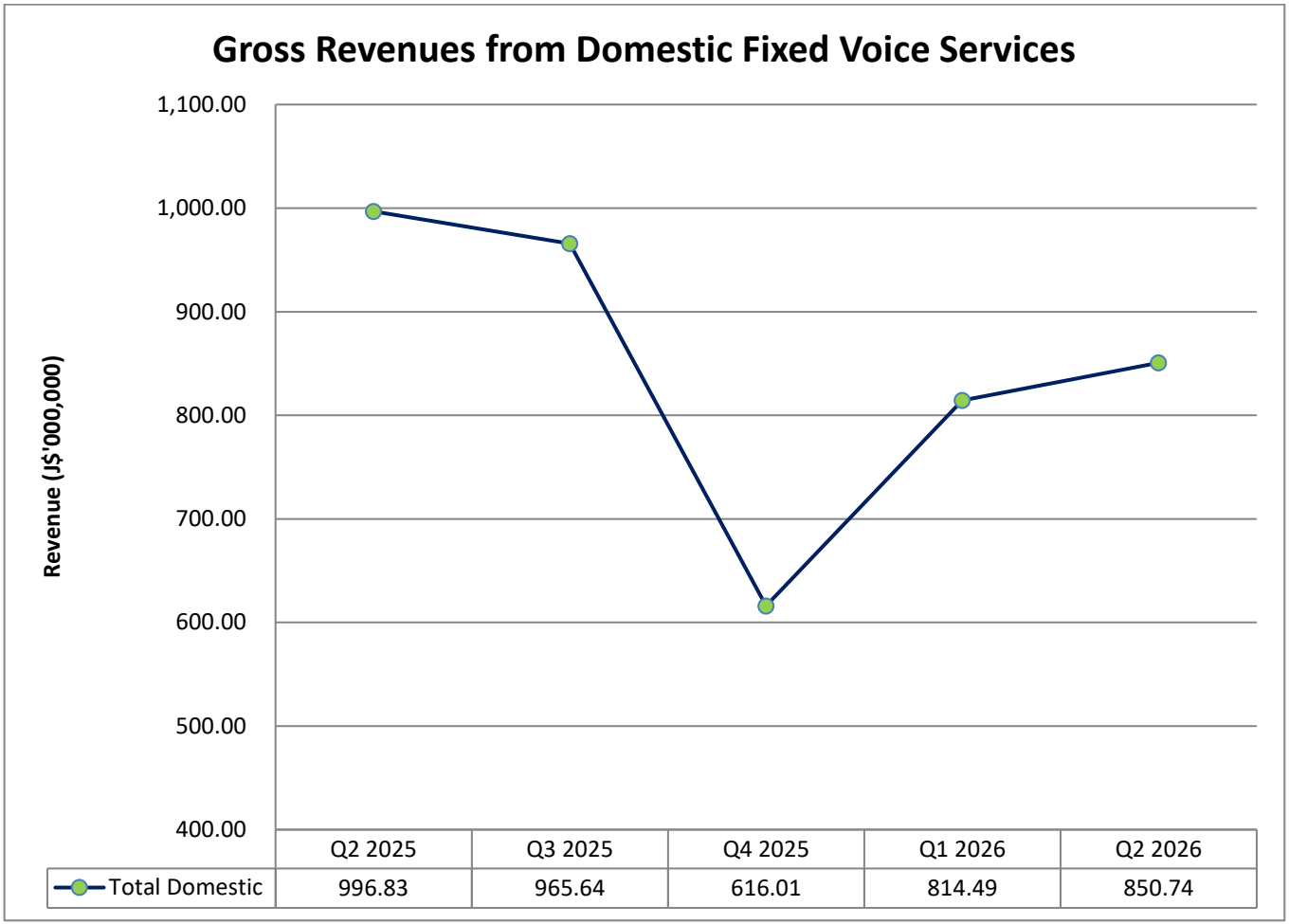
Figure 2: Fixed Voice Services Penetration Rate



% Change: Q2 '26/Q1 '26

1.30%

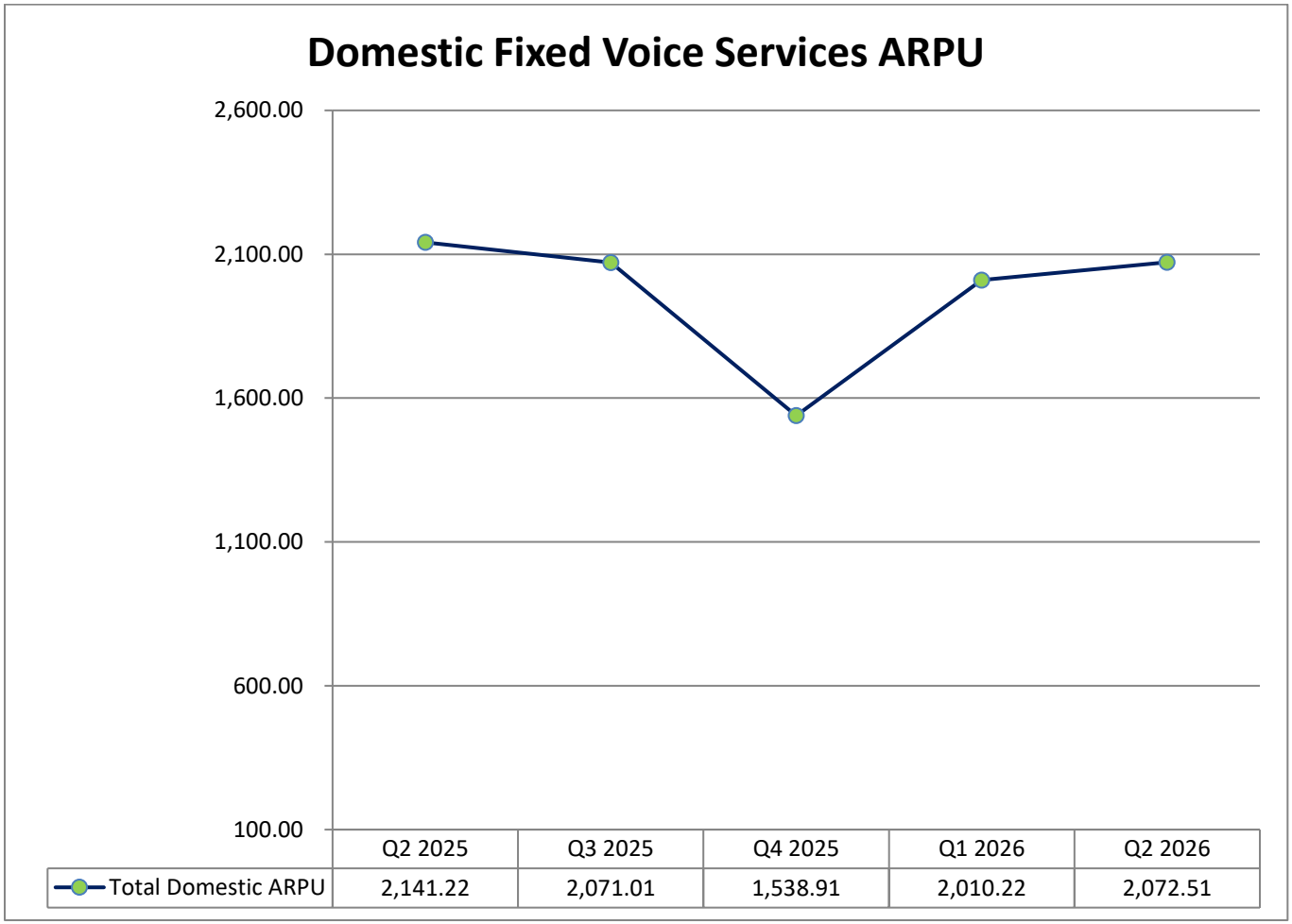
Figure 3: Gross Revenues from Domestic Fixed Voice Services



% Change Q2 '26/Q1 '26

4.45%

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

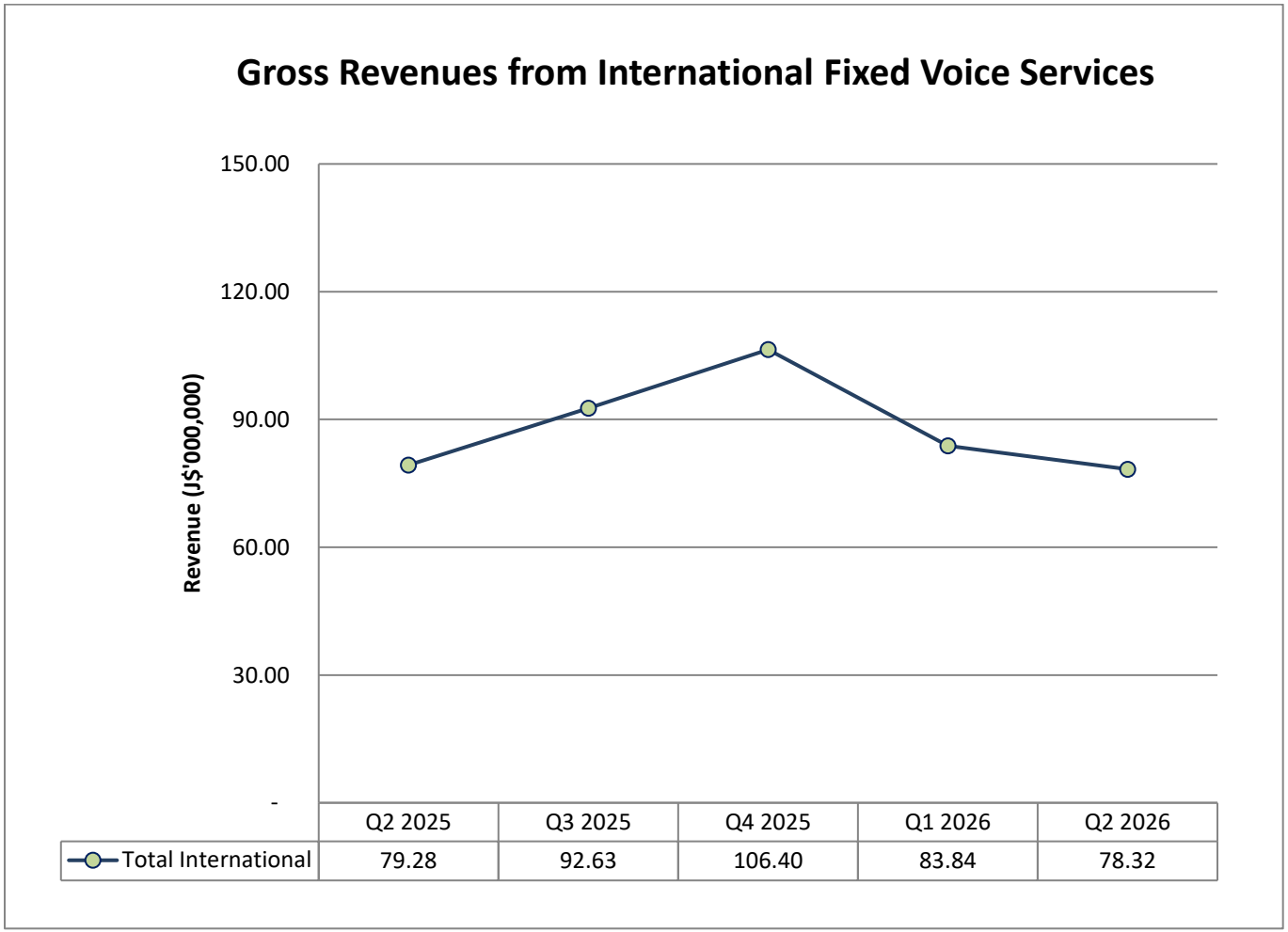


	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Total Domestic ARPU	2,141.22	2,071.01	1,538.91	2,010.22	2,072.51

% Change: Q2 '26/Q1 '26

3.10%

Figure 5: Gross Revenues from International Fixed Voice Services

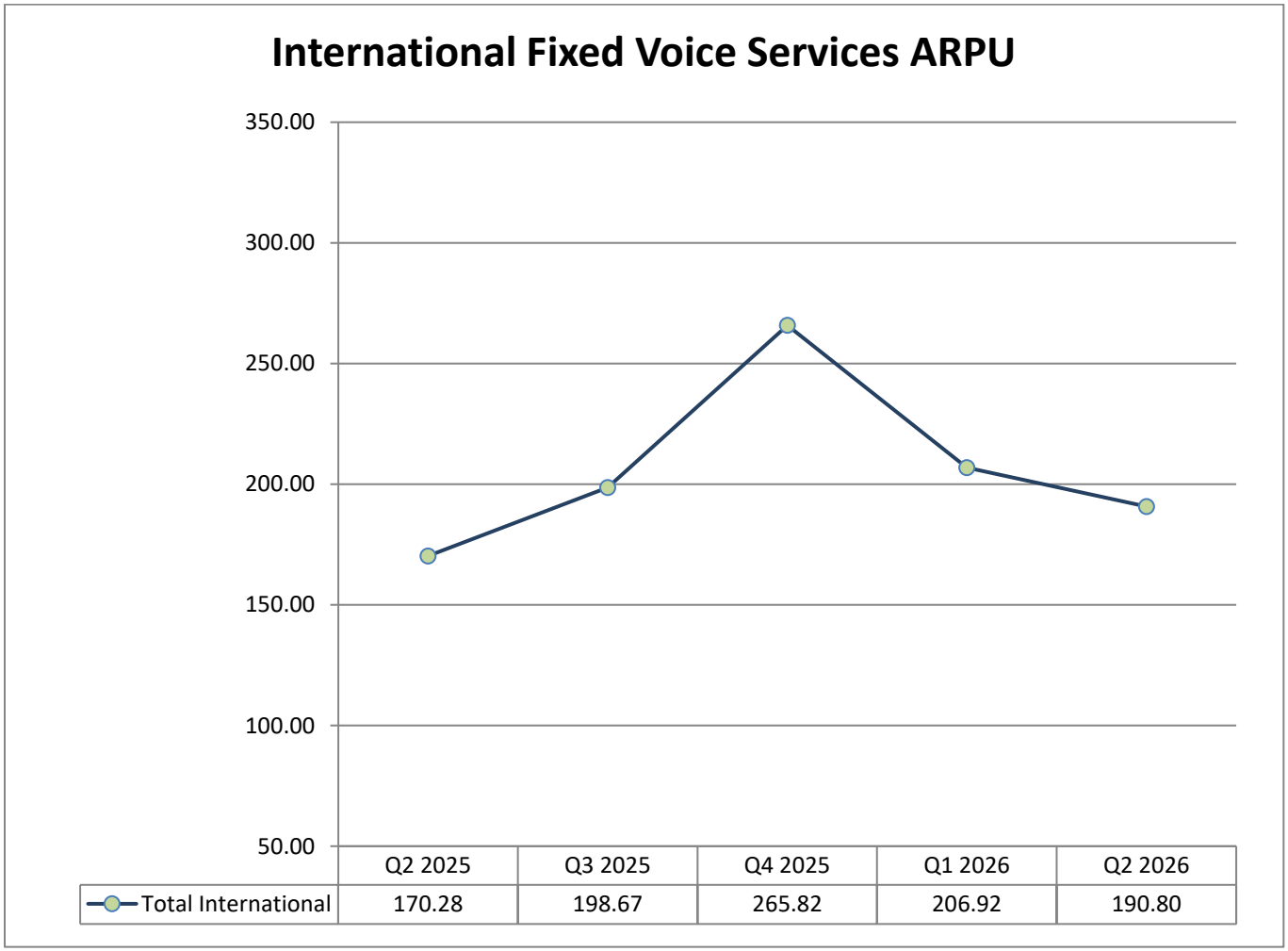


	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Total International	79.28	92.63	106.40	83.84	78.32

% Change: Q2 '26/Q1 '26

-6.58%

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

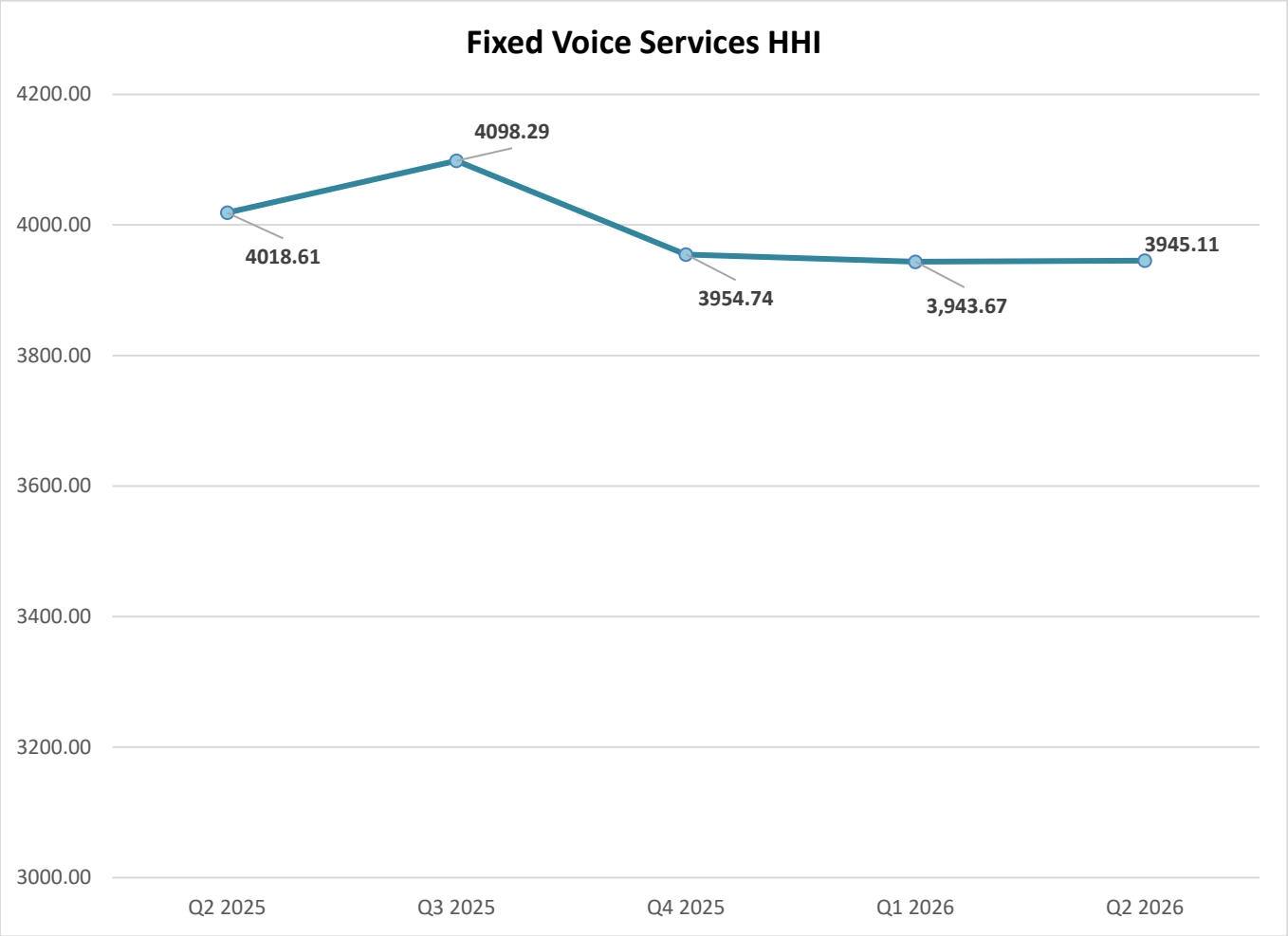


	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Total International	170.28	198.67	265.82	206.92	190.80

% Change: Q2 '26/Q1 '26

-7.79%

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

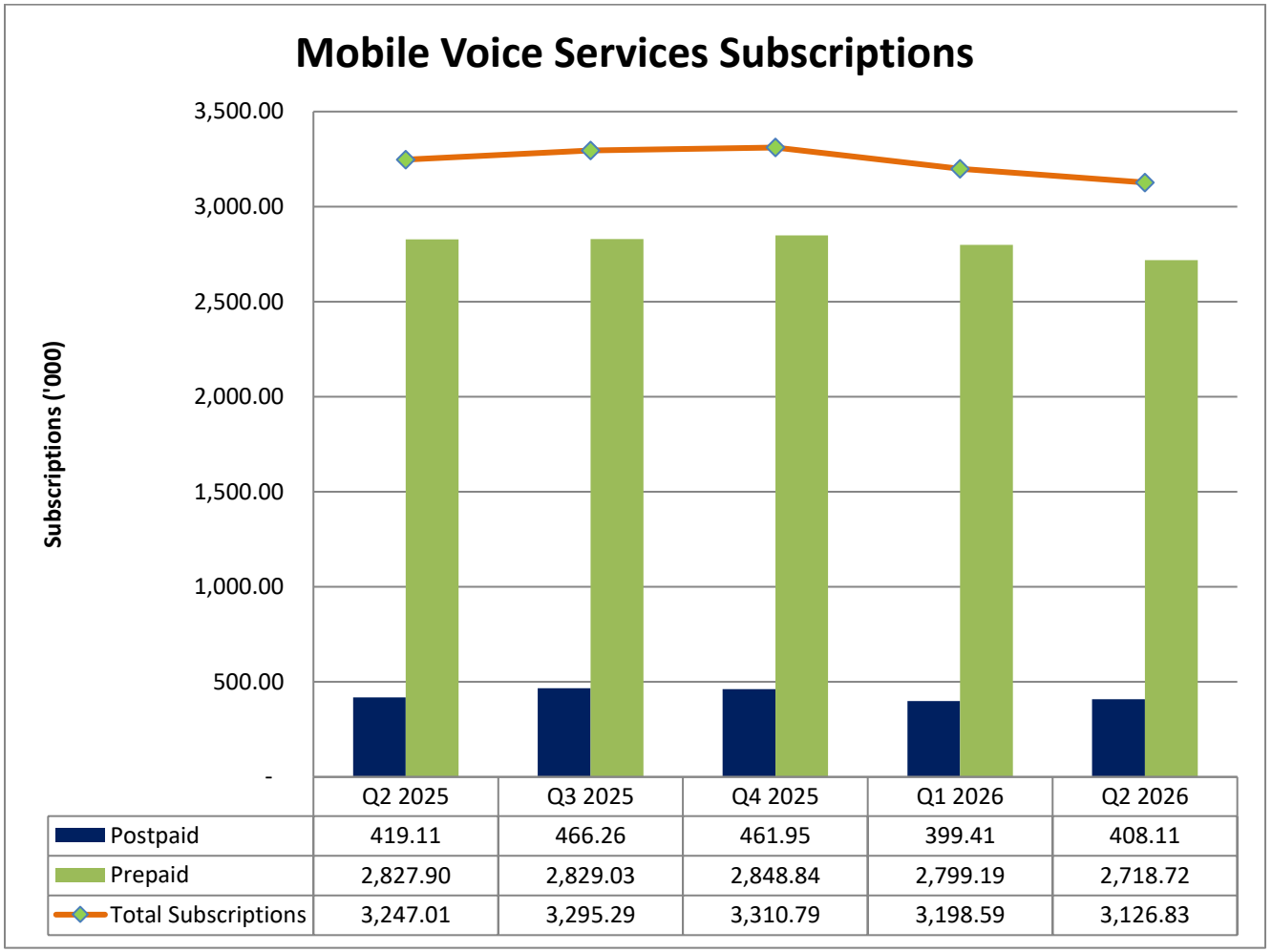


% Change: Q2 '26/Q1 '26

0.04%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Postpaid	419.11	466.26	461.95	399.41	408.11
Prepaid	2,827.90	2,829.03	2,848.84	2,799.19	2,718.72
Total Subscriptions	3,247.01	3,295.29	3,310.79	3,198.59	3,126.83

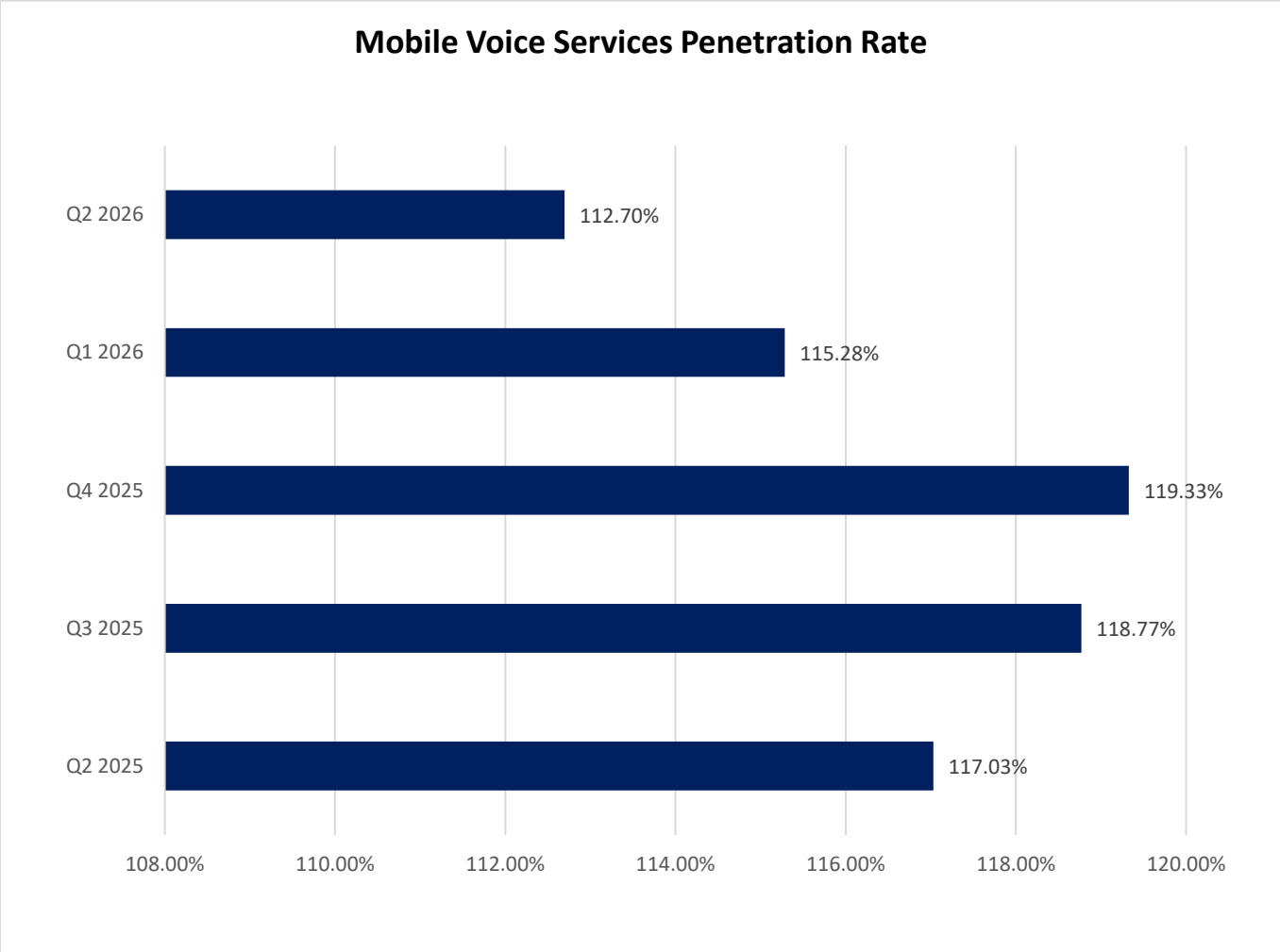
% Change: Q2 '26/Q1 '26

Total Subscriptions: -2.24%

Postpaid: 2.18%

Prepaid: -2.87%

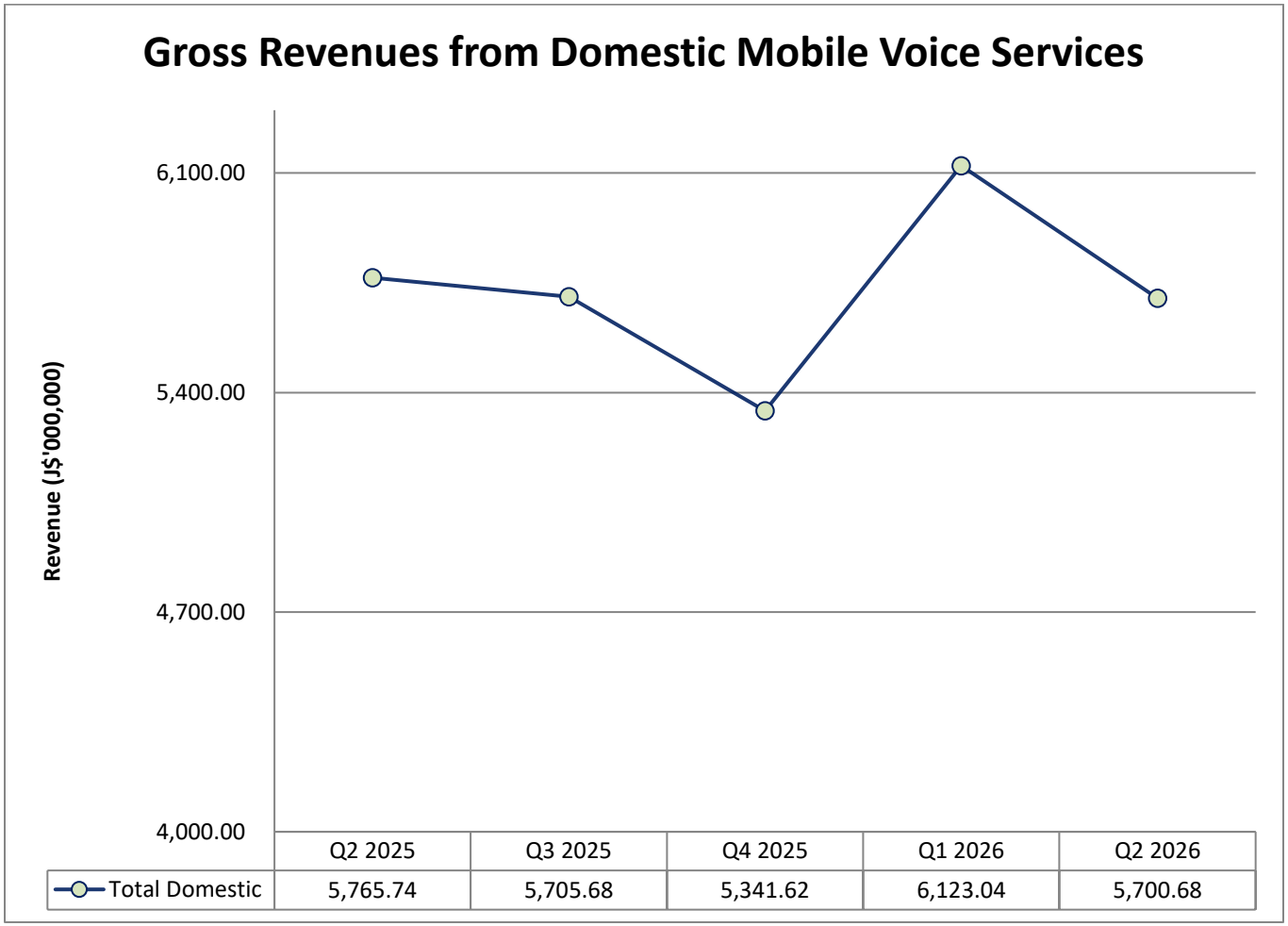
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q2 '26/Q1 '26

-2.24%

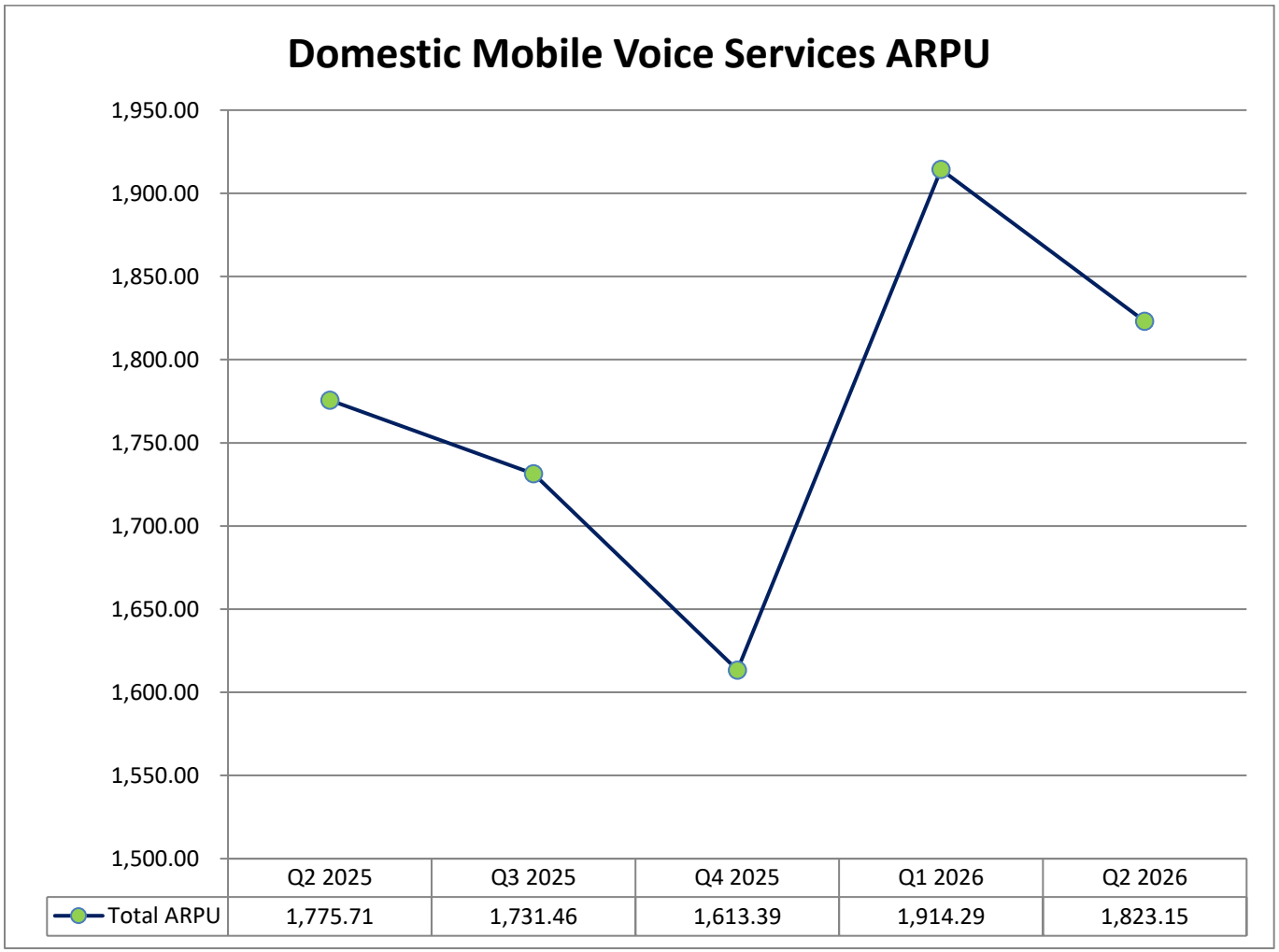
Figure 10: Gross Revenues from Domestic Mobile Voice Services



% Change: Q2 '26/Q1 '26

-6.90%

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

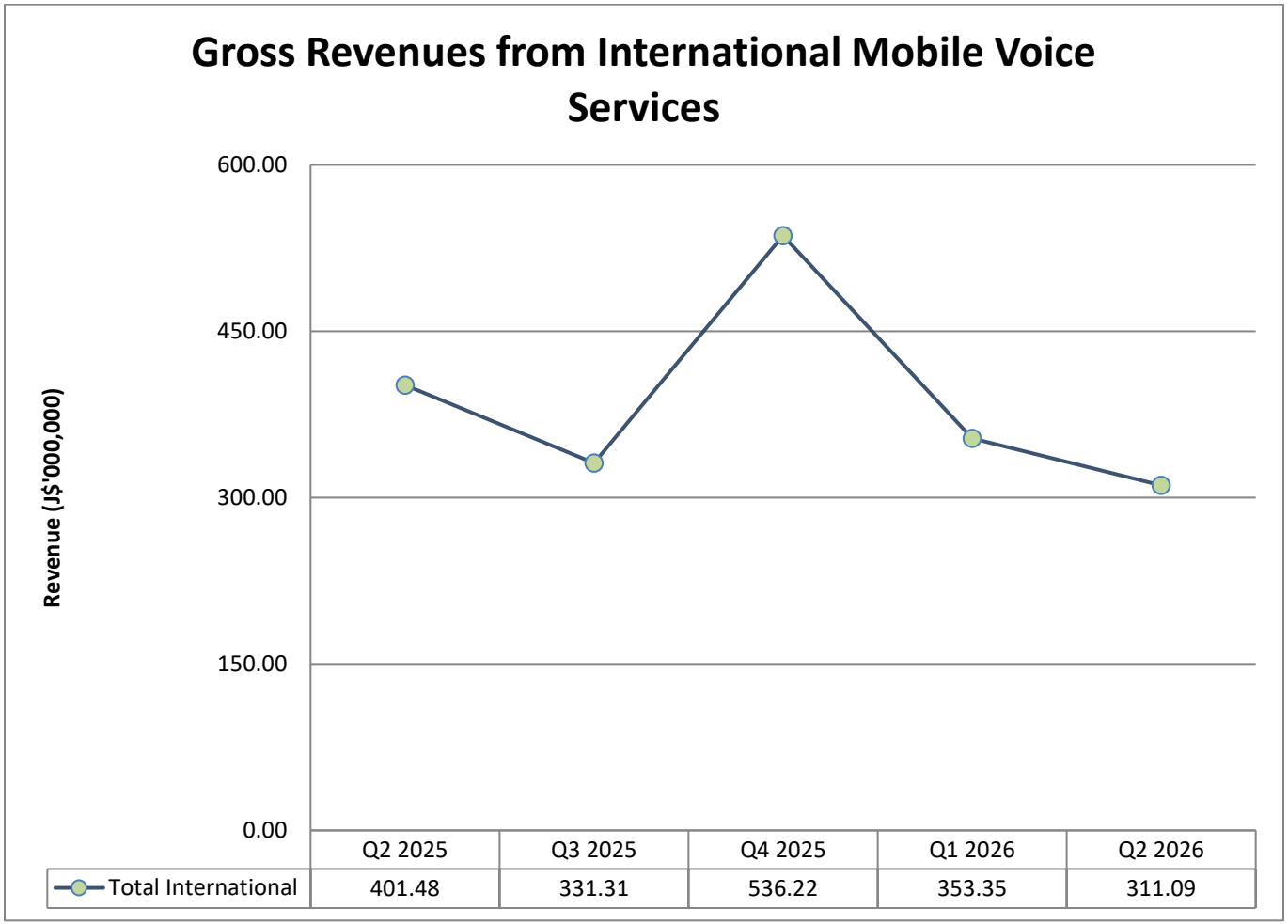


	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Total ARPU	1,775.71	1,731.46	1,613.39	1,914.29	1,823.15

% Change: Q2 '26/Q1 '26

-4.76%

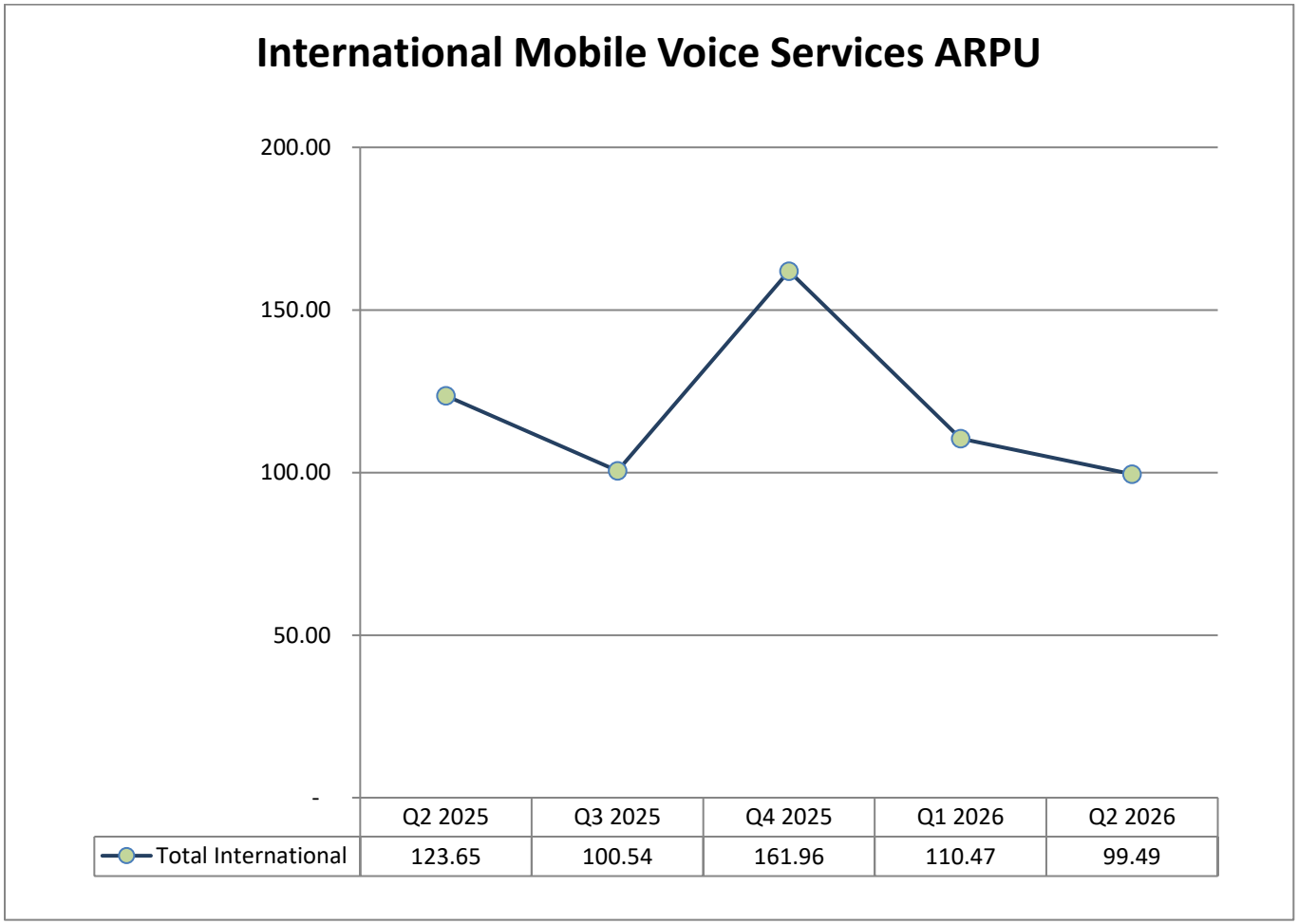
Figure 12: Gross Revenues from International Mobile Voice Services



% Change: Q2 '26/Q1 '26

-11.96%

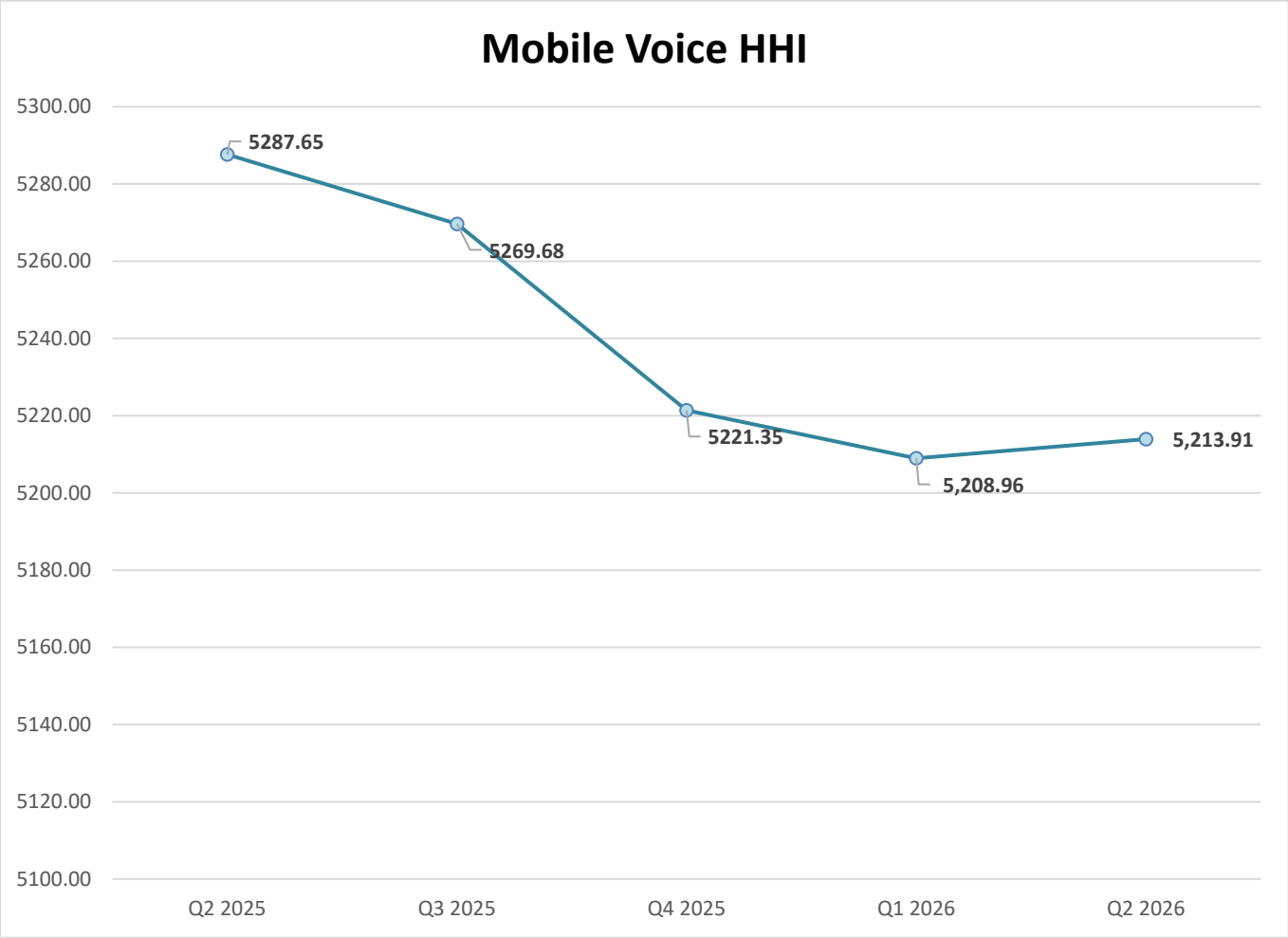
Figure 13: International Mobile Voice Services Average Revenue per User (ARPU)



% Change: Q2 '26/Q1 '26

-9.94%

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

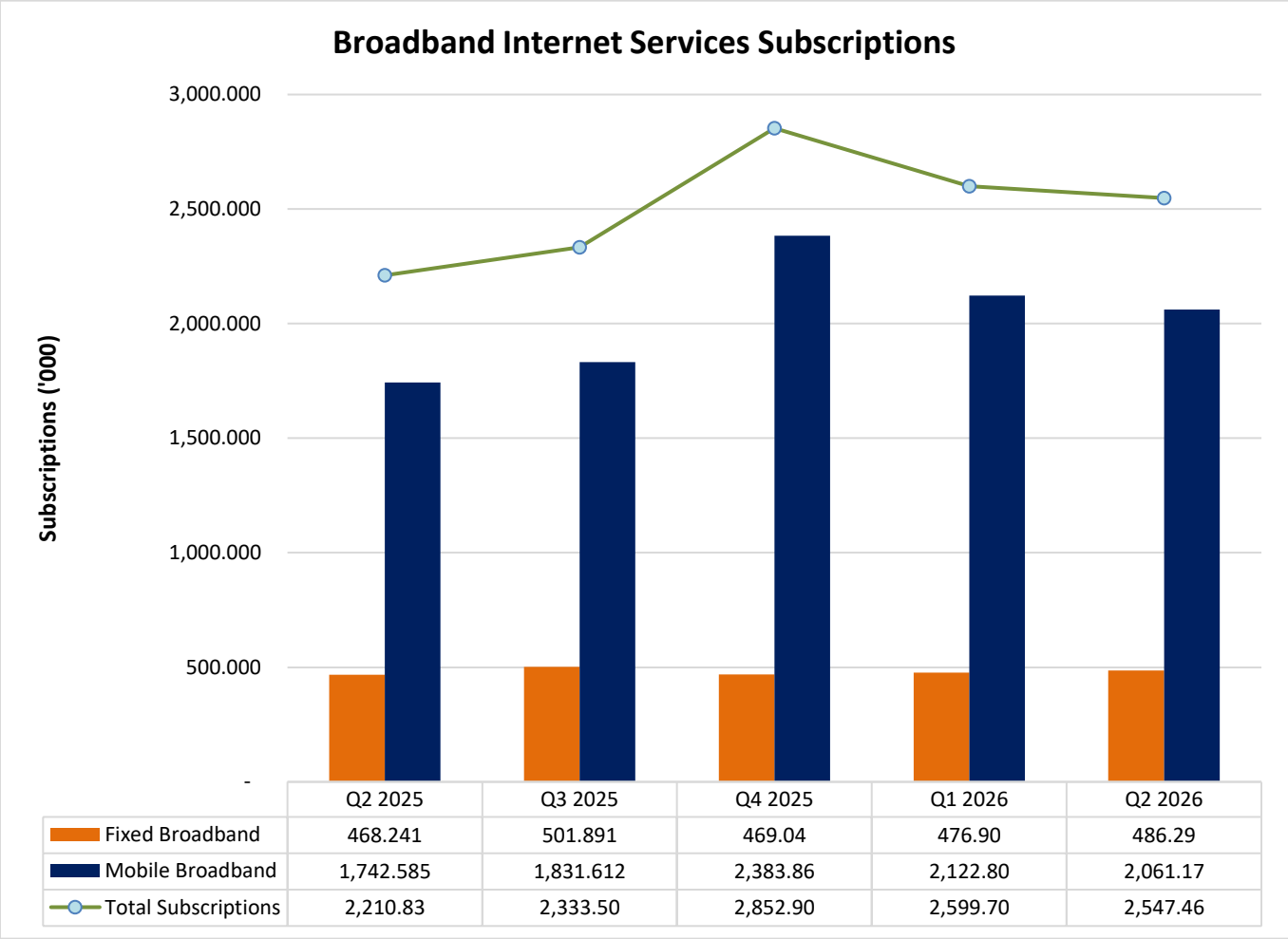


% Change: Q2 '26/Q1 '26

0.10%

Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions



	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Fixed Broadband	468.241	501.891	469.04	476.90	486.29
Mobile Broadband	1,742.585	1,831.612	2,383.86	2,122.80	2,061.17
Total Subscriptions	2,210.83	2,333.50	2,852.90	2,599.70	2,547.46

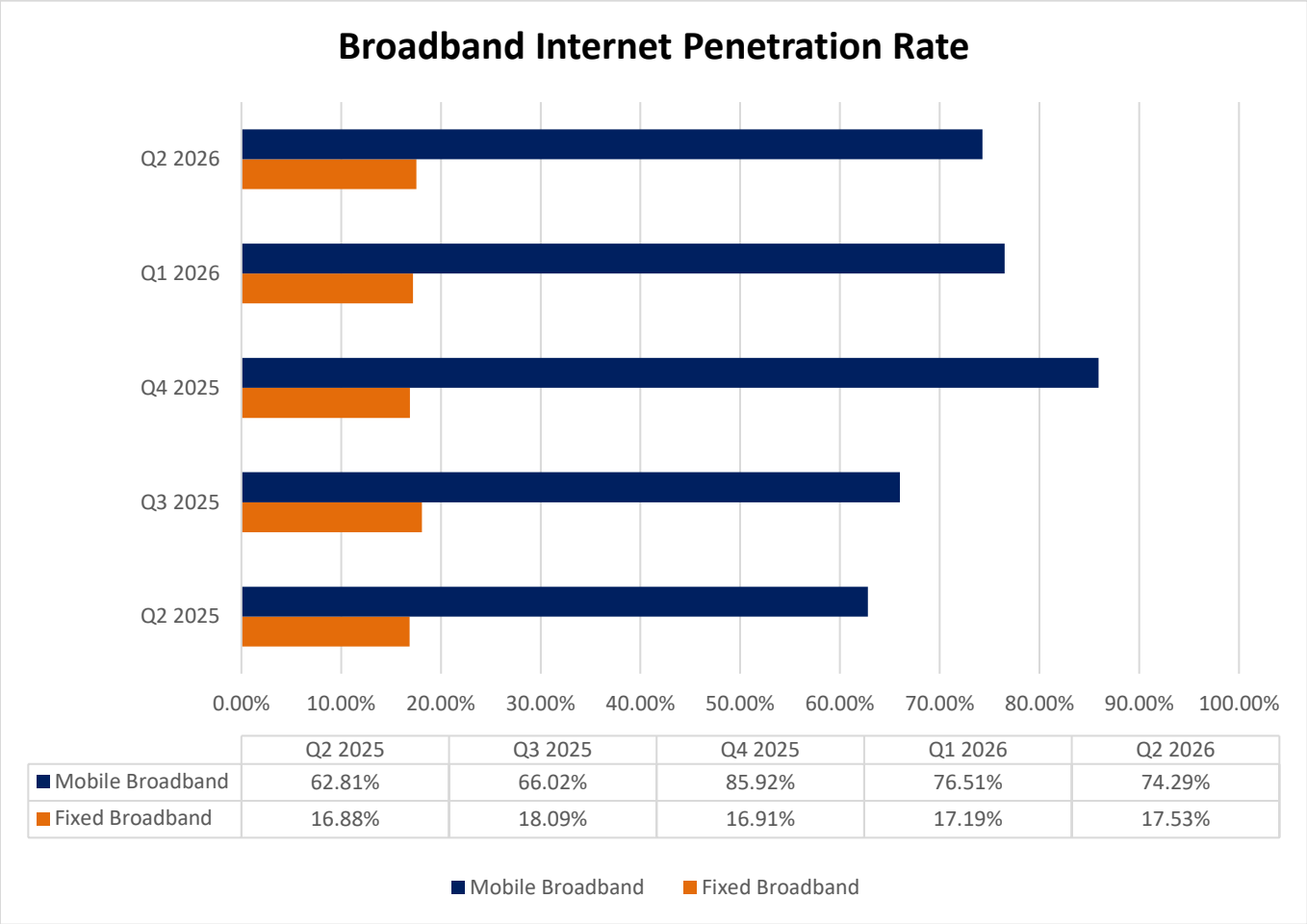
% Change: Q2 '26/Q1 '26

Total Subscriptions: -2.01%

Fixed Broadband: 1.97%

Mobile Broadband: -2.90%

Figure 16: Broadband Internet Penetration Rate



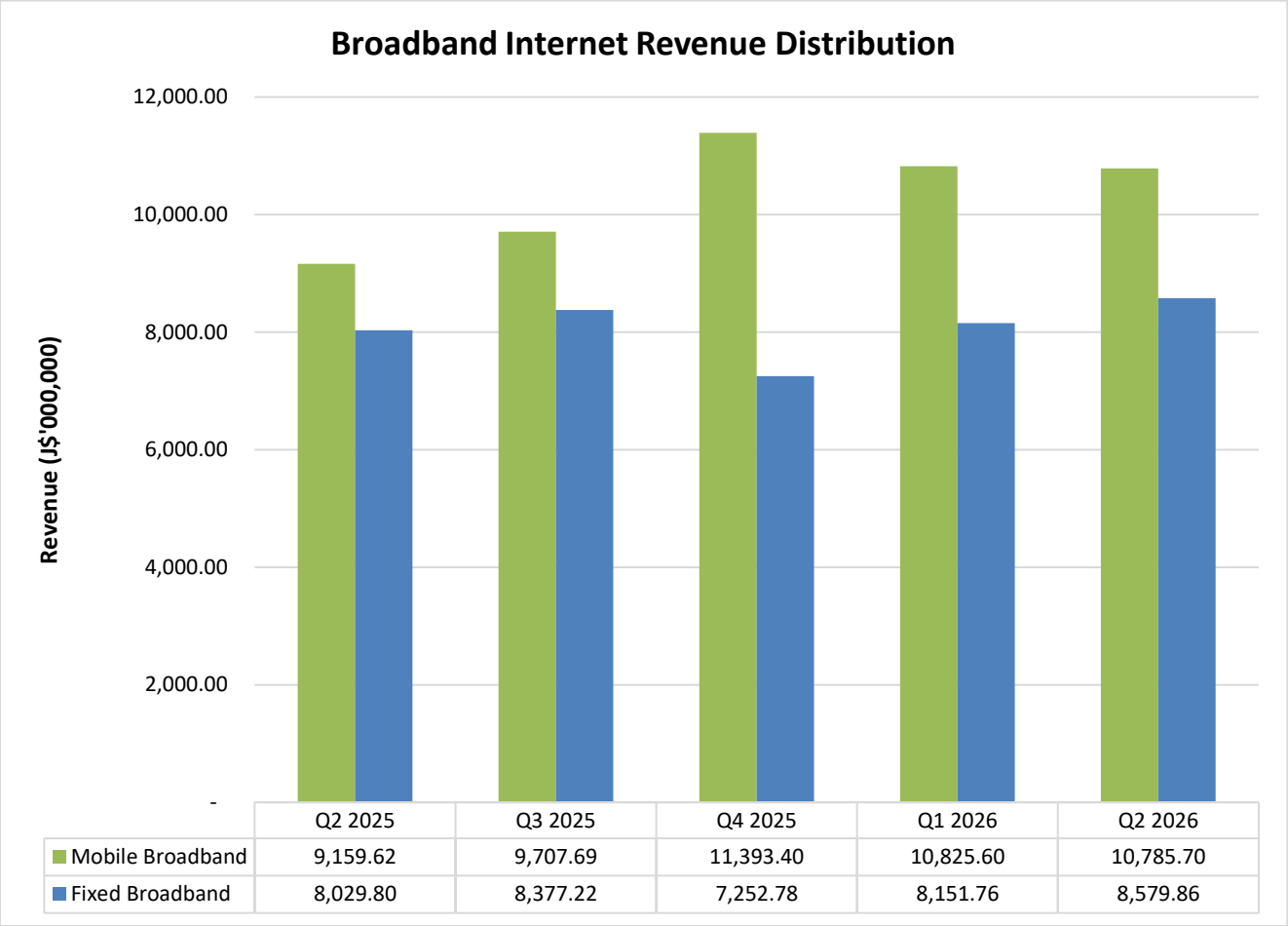
	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Mobile Broadband	62.81%	66.02%	85.92%	76.51%	74.29%
Fixed Broadband	16.88%	18.09%	16.91%	17.19%	17.53%

% Change: Q2 '26/Q1 '26

Fixed Broadband: 1.98%

Mobile Broadband: -2.90%

Figure 17: Broadband Internet Revenue Distribution



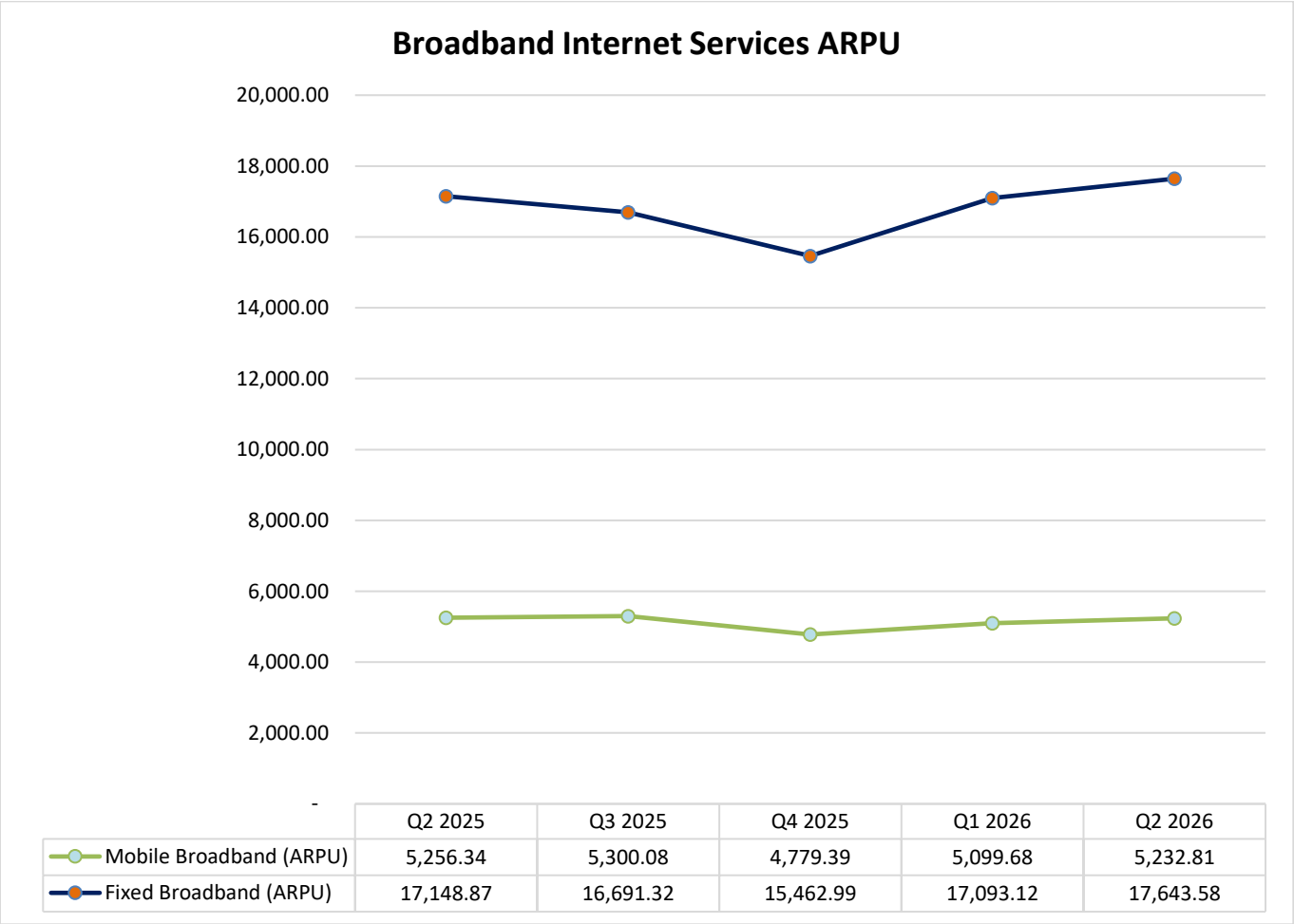
	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Mobile Broadband	9,159.62	9,707.69	11,393.40	10,825.60	10,785.70
Fixed Broadband	8,029.80	8,377.22	7,252.78	8,151.76	8,579.86

% Change: Q2 '26/Q1 '26

Fixed Broadband: 5.25%

Mobile Broadband: -0.37%

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



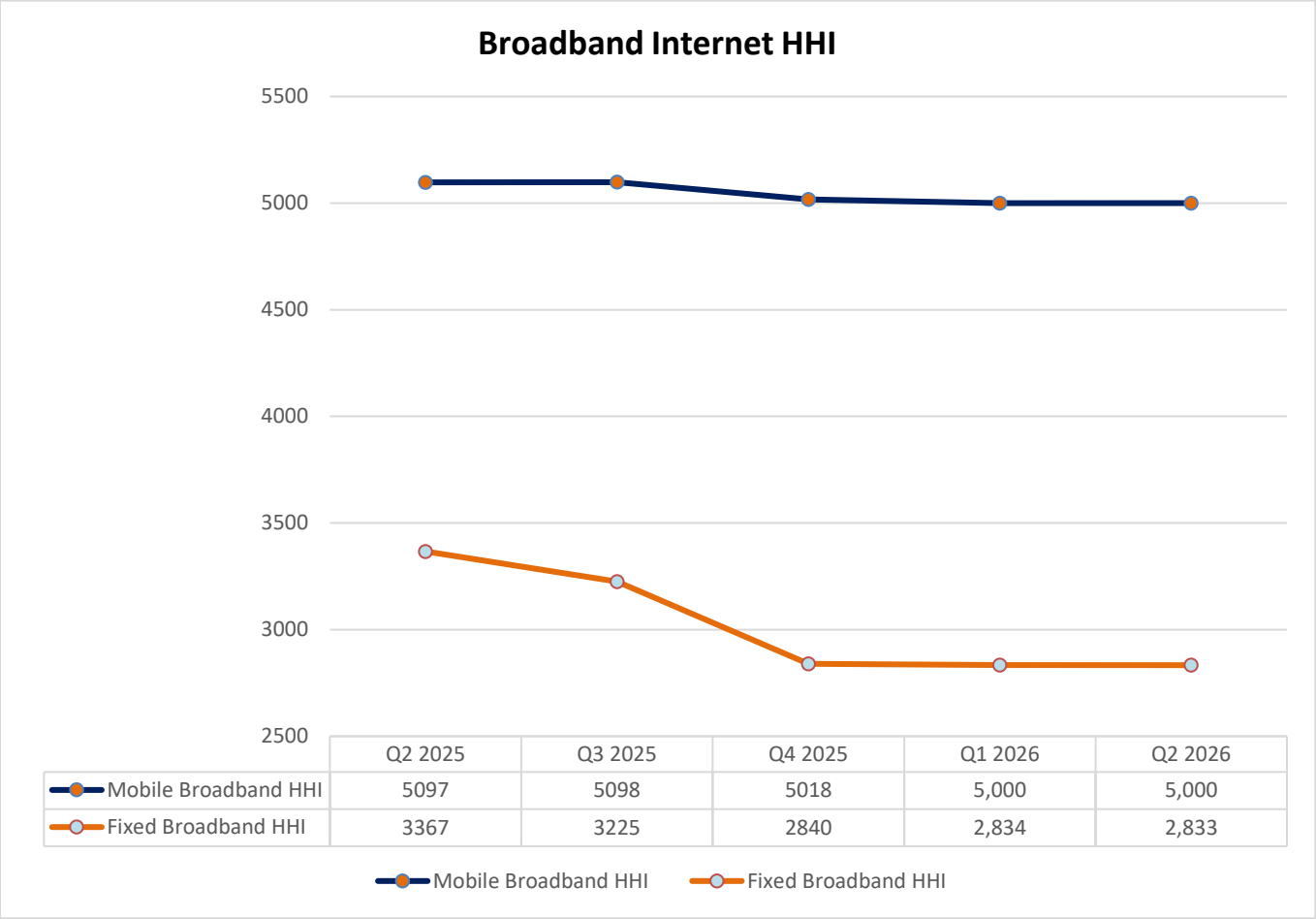
	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Mobile Broadband (ARPU)	5,256.34	5,300.08	4,779.39	5,099.68	5,232.81
Fixed Broadband (ARPU)	17,148.87	16,691.32	15,462.99	17,093.12	17,643.58

% Change: Q2 '26/Q1 '26

Fixed Broadband: 3.22%

Mobile Broadband: 2.61%

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



% Change: Q2 '26/Q1 '26

Fixed Broadband: -0.04%

Mobile Broadband: 0.00%

Industry Penetration and Concentration

Penetration Rate[1]

Penetration Rate	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Fixed Voice Subscription Penetration Rate	16.78%	16.81%	14.43%	14.60%	14.79%
Mobile Voice Subscription Penetration Rate	117.03%	118.77%	119.33%	115.28%	112.70%
Fixed Broadband Subscription Penetration Rate	16.88%	18.09%	16.91%	17.19%	17.53%
Mobile Broadband Subscription Penetration Rate	62.81%	66.02%	85.92%	76.51%	74.29%
Total Broadband Subscription Penetration Rate	79.68%	84.10%	102.82%	93.70%	91.82%

Concentration Ratio (Herfindahl-Hirschman Index)[2]

Herfindahl-Hirschman Index (HHI)	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Fixed Voice HHI	4,019	4,098	3,955	3,944	3945
Mobile Voice HHI	5,288	5,270	5,221	5,209	5214
Fixed Broadband HHI	3,367	3,225	2,840	2,834	2833
Mobile Broadband HHI	5,097	5,098	5,018	5,000	5000

[1] Calculated using population year-end 2022 data from the Statistical Institute of Jamaica: 2,774,538.

[2] Calculated using subscription data.

Appendix

Fixed Voice Services	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	% Change Q2 '26/Q1 '26	% Change Q2 '26/Q2 '25
Total Subscriptions ('000)	465.55	466.27	400.29	405.17	410.49	1.31	-11.83
Gross Domestic Revenue (J$' million)	996.83	965.64	616.01	814.49	850.74	4.45	-14.66
Gross Domestic ARPU	2,141.22	2,071.01	1,538.91	2,010.22	2,072.51	3.10	-3.21
Gross International Revenue (J$' million)	79.28	92.63	106.40	83.84	78.32	-6.58	-1.20
International ARPU	170.28	198.67	265.82	206.92	190.80	-7.79	12.05

Mobile Voice Services	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	% Change Q2 '26/Q1 '26	% Change Q2 '26/Q2 '25
Total Subscriptions ('000)	3,247.01	3,295.29	3,310.79	3,198.59	3,126.83	-2.24	-3.70
Gross Domestic Revenue (J$' million)	5,765.74	5,705.68	5,341.62	6,123.04	5,700.68	-6.90	-1.13
Gross Domestic ARPU	1,775.71	1,731.46	1,613.39	1,914.29	1,823.15	-4.76	2.67
Gross International Revenue (J$' million)	401.48	331.31	536.22	353.35	311.09	-11.96	-22.51
International ARPU	123.65	100.54	161.96	110.47	99.49	-9.94	-19.54

Internet Services	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	% Change Q2 '26/Q1 '26	% Change Q2 '26/Q2 '25
Total Subscriptions ('000)	2,210.83	2,333.50	2,852.90	2,599.70	2,547.46	-2.01	15.23
Fixed Broadband	468.24	501.89	469.04	476.90	486.29	1.97	3.85
Mobile Broadband	1,742.59	1,831.61	2,383.86	2,122.80	2,061.17	-2.90	18.28
Total Revenue (J$' million)	17,189.42	18,084.91	18,646.18	18,977.35	19,365.56	2.05	12.66
Total ARPU	7,775.11	7,750.11	6,535.87	7,299.82	7,601.92	4.14	-2.23

Penetration Rate	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
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