Office of Utilities Regulation

Telecommunications Market Information Report

January - March 2026



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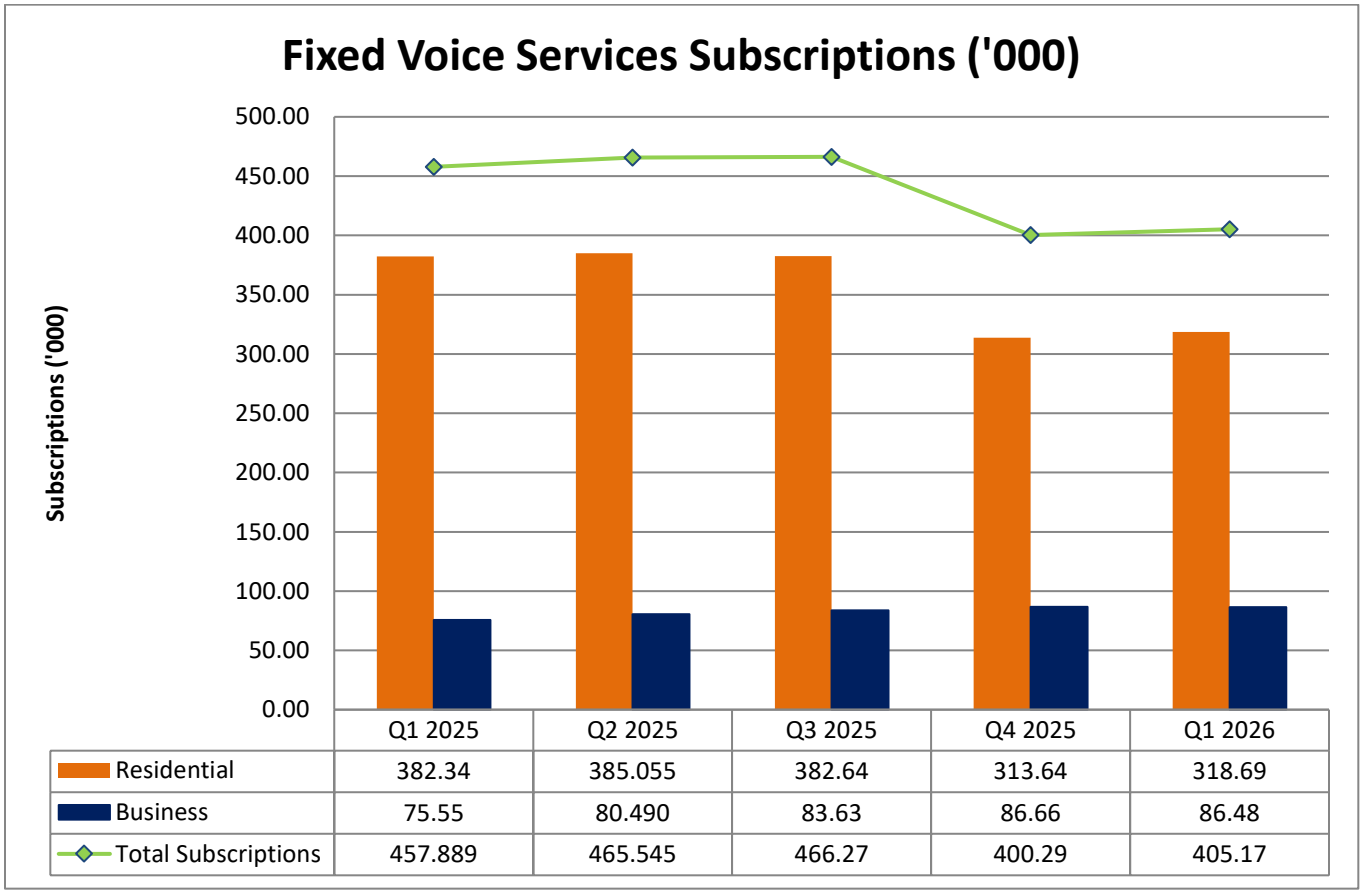
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Fixed Voice Data

Figure 1: Fixed Voice Services Subscriptions



	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Residential	382.34	385.055	382.64	313.64	318.69
Business	75.55	80.490	83.63	86.66	86.48
Total Subscriptions	457.889	465.545	466.27	400.29	405.17

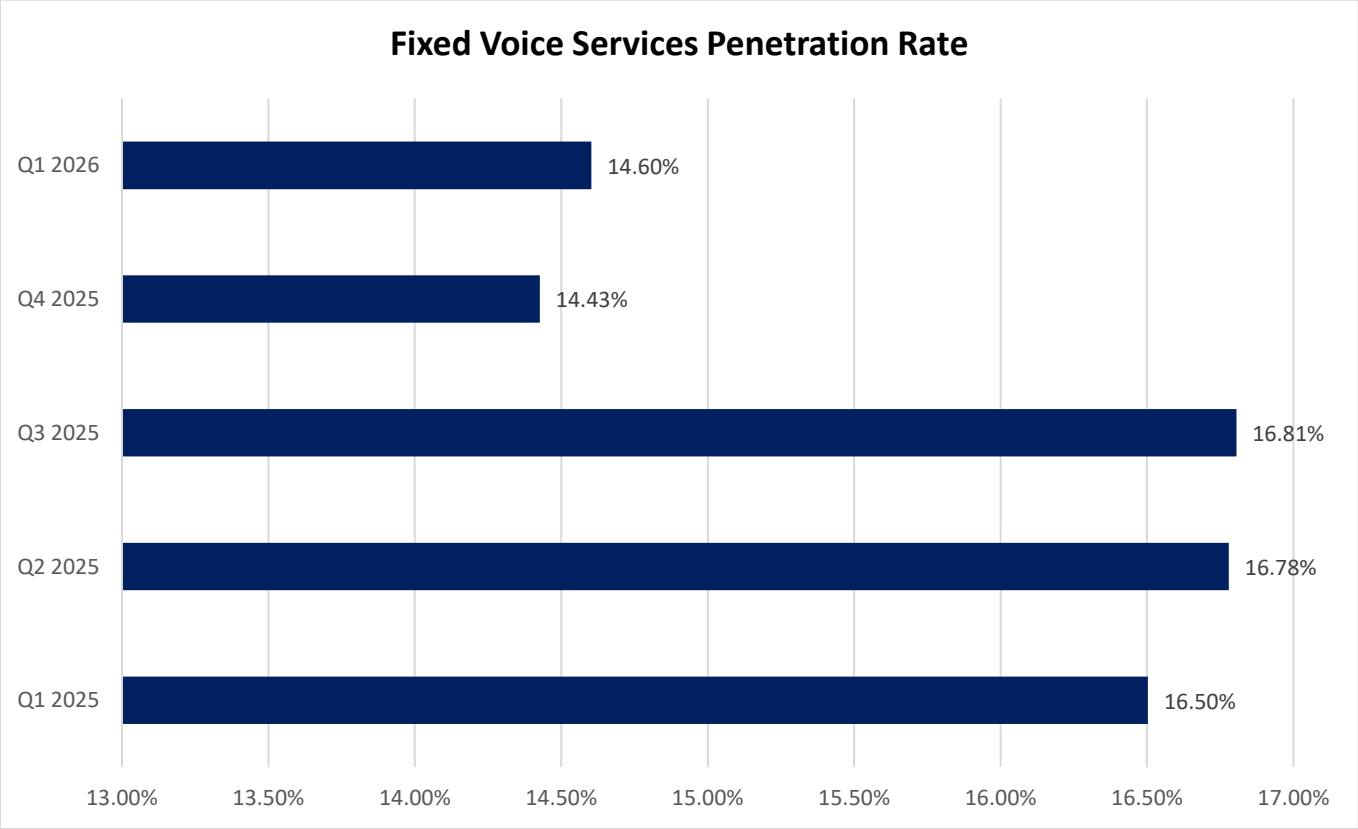
% Change: Q1 '26/Q4 '25

Total Subscriptions: 1.22%

Residential: 1.61%

Business: -0.20%

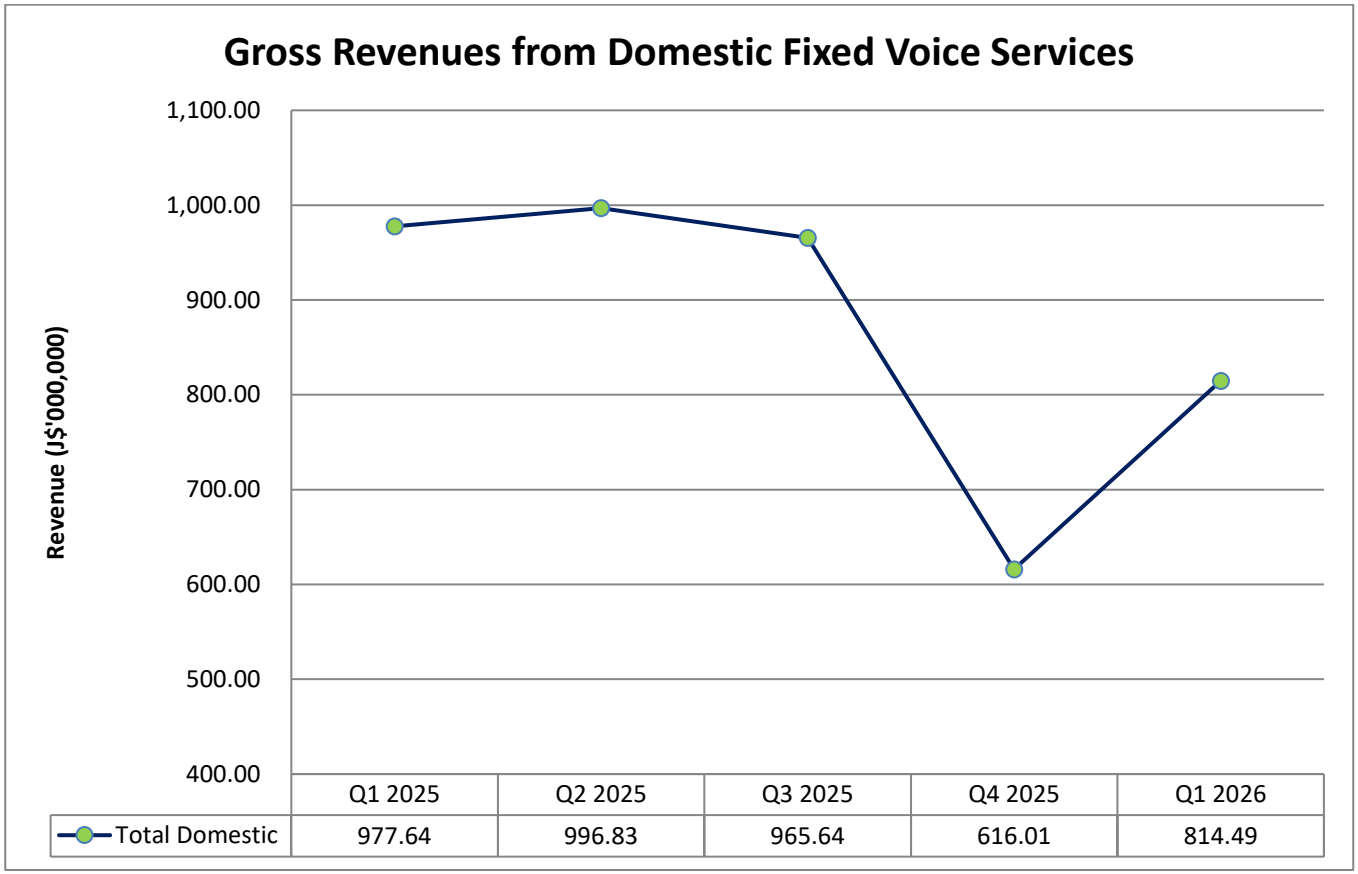
Figure 2: Fixed Voice Services Penetration Rate



% Change: Q1 '26/Q4 '25

1.18%

Figure 3: Gross Revenues from Domestic Fixed Voice Services[1]

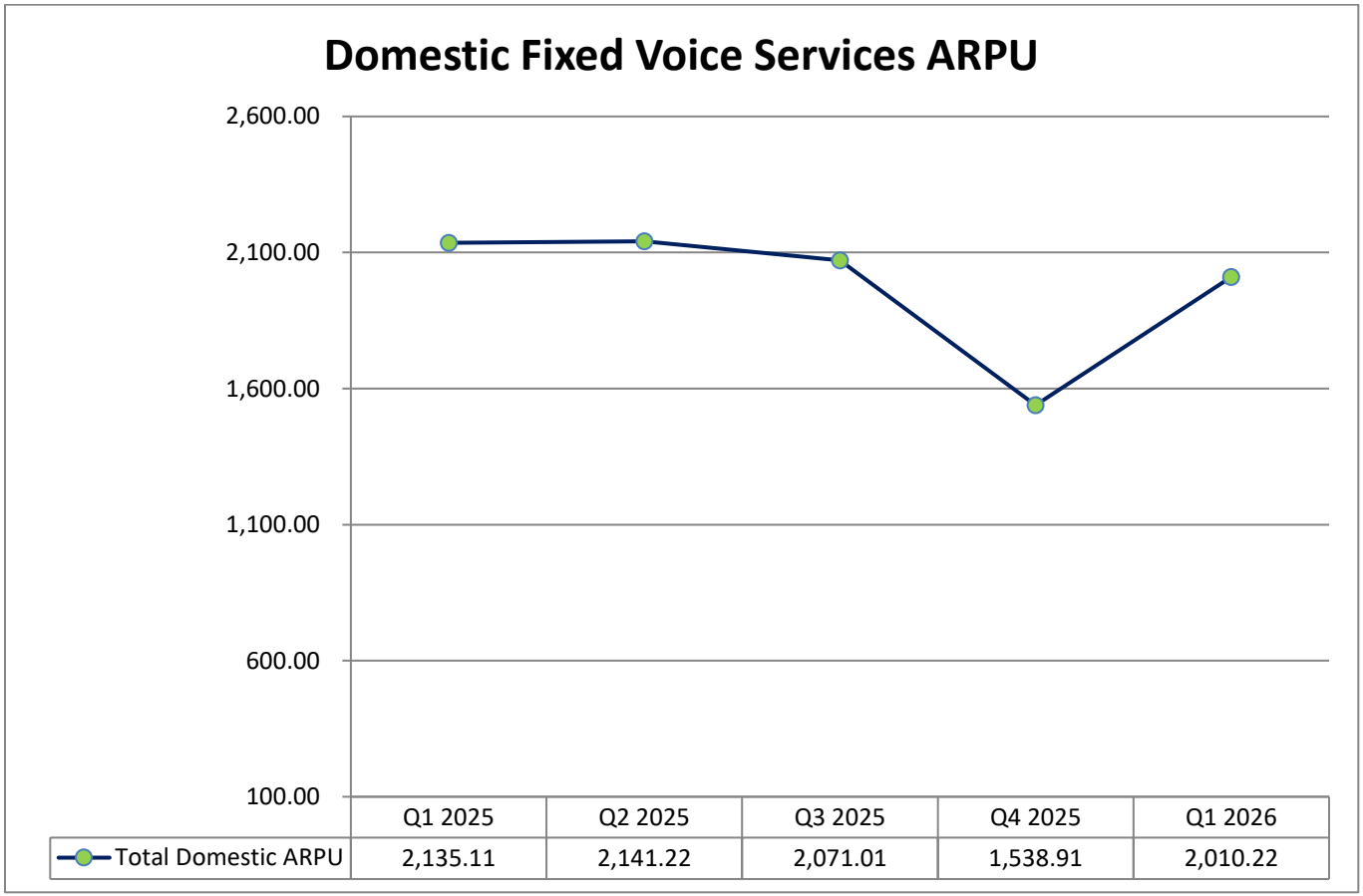


% Change Q1 '26/Q4 '25

32.22%

[1] Gross revenues from domestic fixed voice services rebounded, largely reflecting the resumption of normal billing by some operators after suspension due to Hurricane Melissa in 2025 October.

Figure 4: Domestic Fixed Voice Services Average Revenue per User (ARPU)[2]

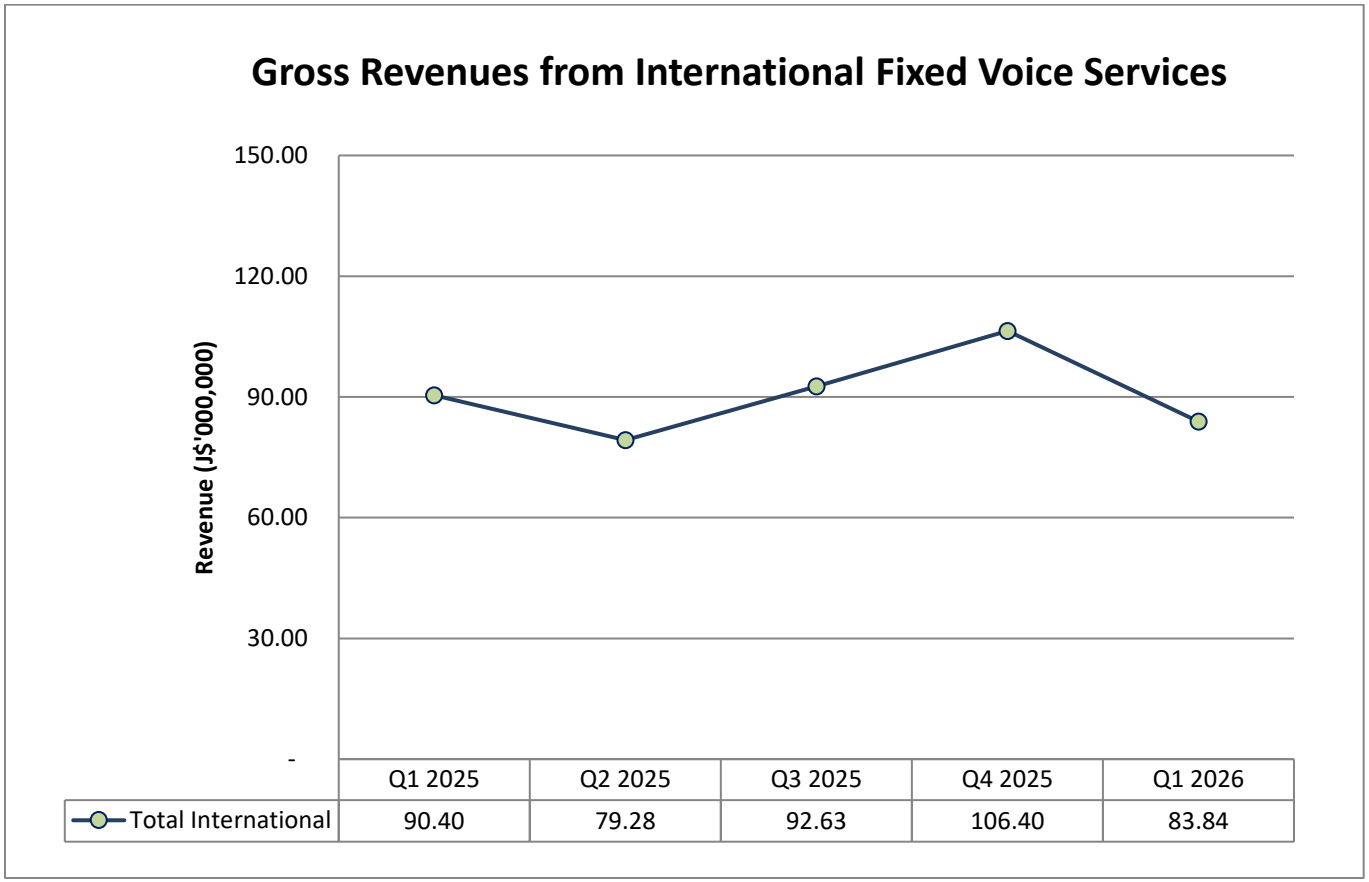


% Change: Q1 '26/Q4 '25

30.63%

[2] The increase in domestic fixed voice services ARPU was largely due to the resumption of normal billing by some operators after suspension due to Hurricane Melissa in 2025 October.

Figure 5: Gross Revenues from International Fixed Voice Services[3]

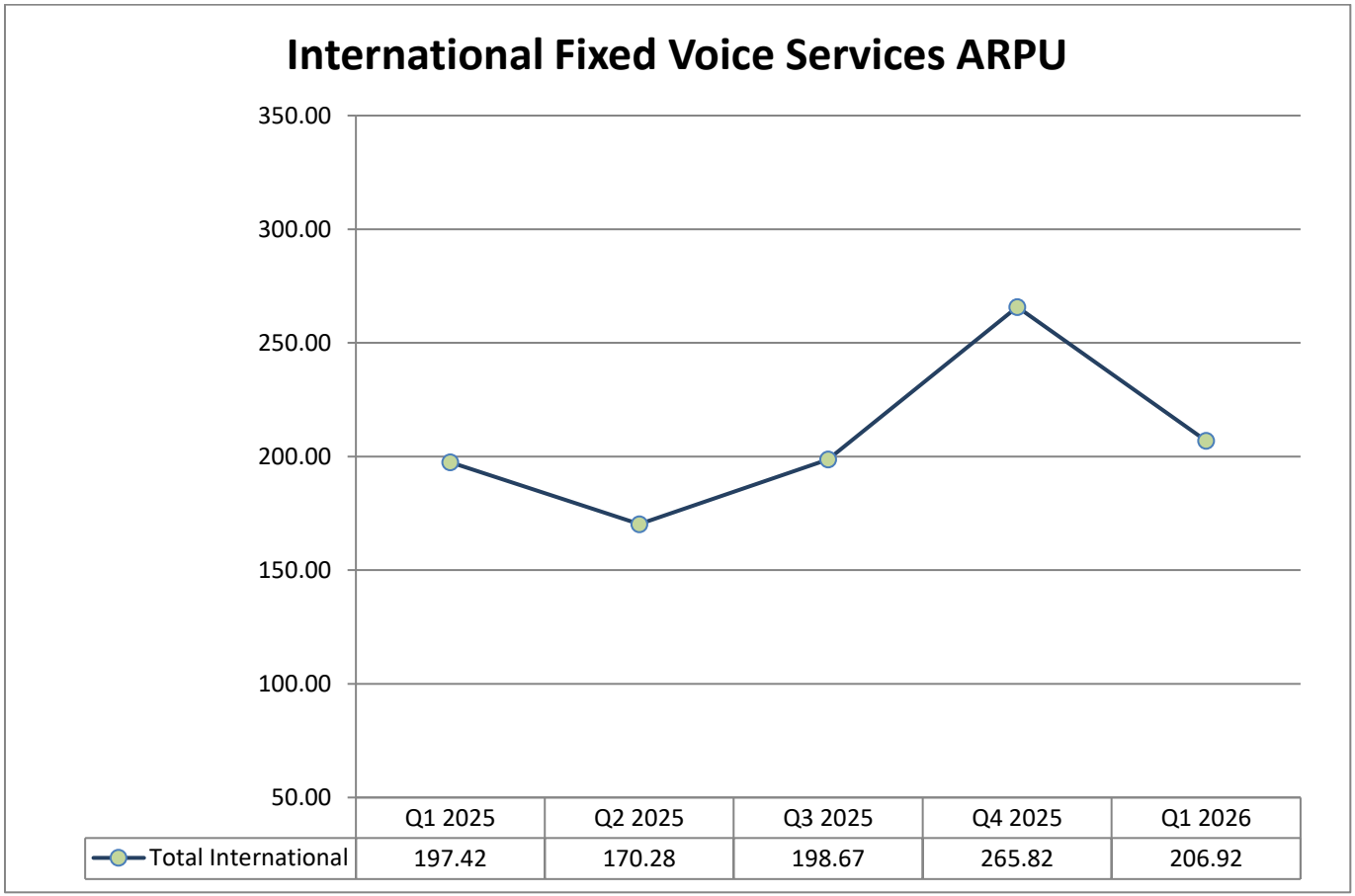


% Change: Q1 '26/Q4 '25

-21.21%

[3] The decline in gross revenues from international fixed voice services was due to a reduction in international calls.

Figure 6: International Fixed Voice Services Average Revenue per User (ARPU)[4]

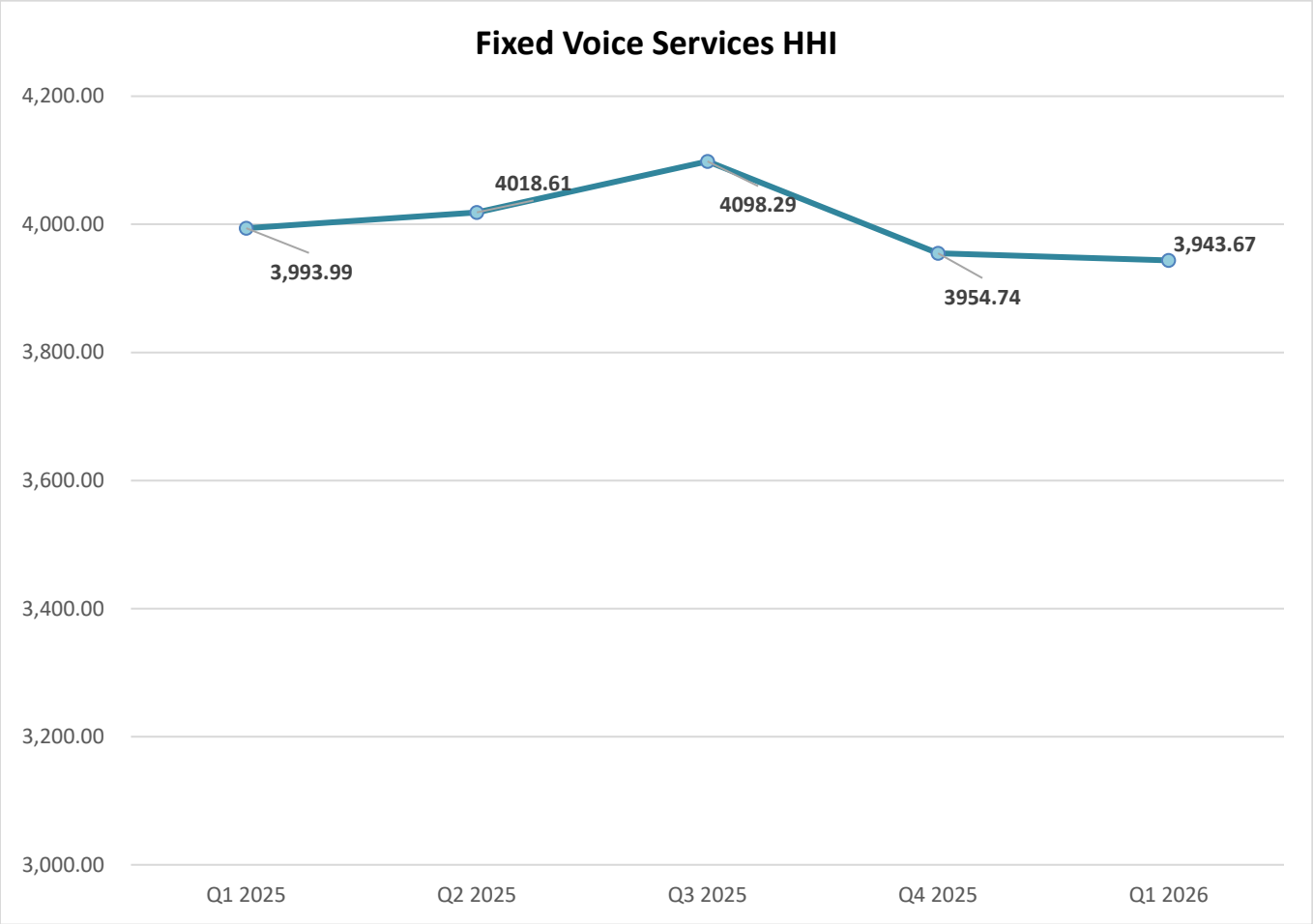


% Change: Q1 '26/Q4 '25

-22.15%

[4] The decline in international fixed voice services ARPU was due to the reduction in gross revenues from international fixed voice services.

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

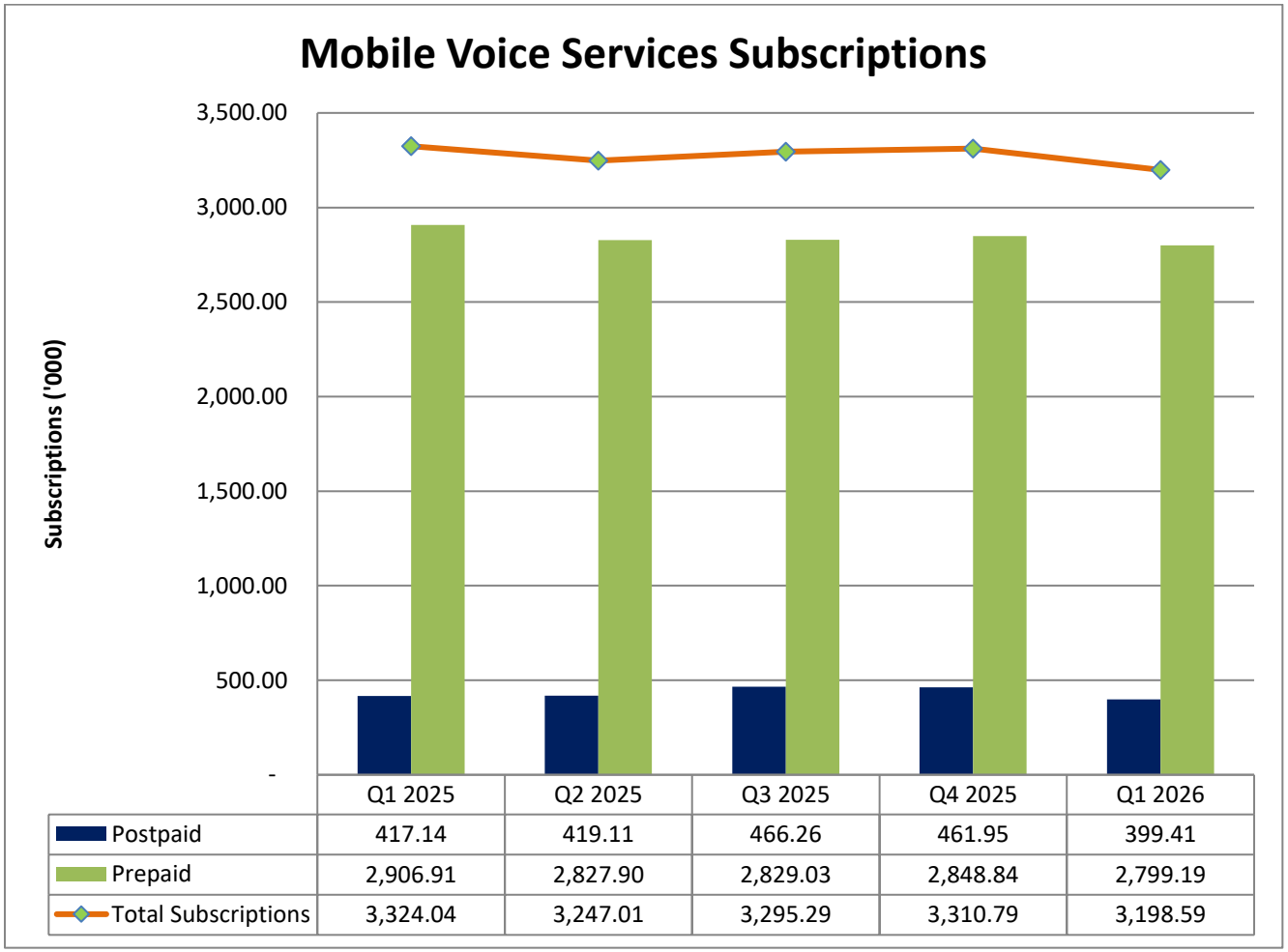


% Change: Q1 '26/Q4 '25

-0.28%

Mobile Voice Data

Figure 8: Mobile Voice Services Subscriptions



	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Postpaid	417.14	419.11	466.26	461.95	399.41
Prepaid	2,906.91	2,827.90	2,829.03	2,848.84	2,799.19
Total Subscriptions	3,324.04	3,247.01	3,295.29	3,310.79	3,198.59

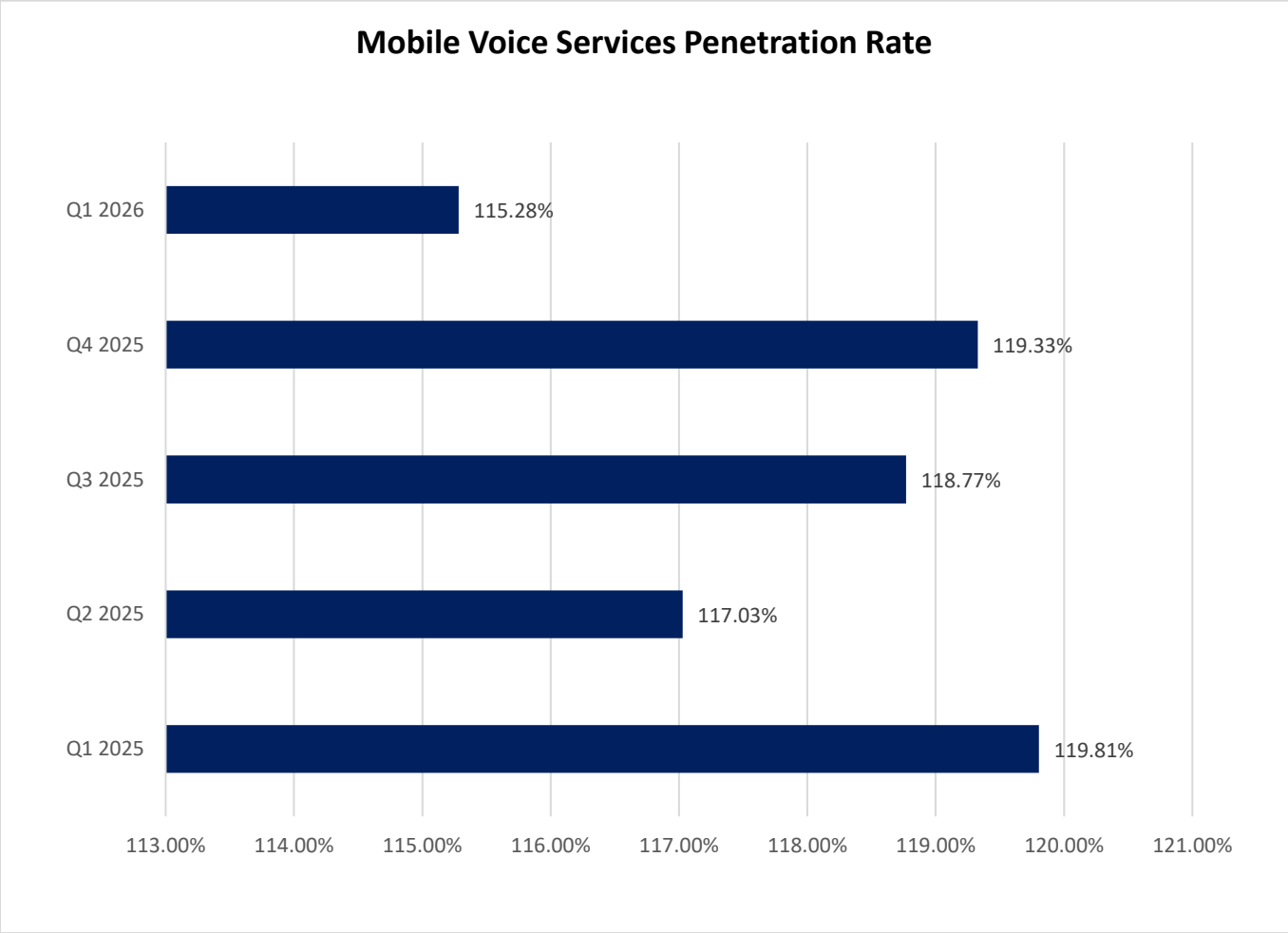
% Change: Q1 '26/Q4 '25

Total Subscriptions: -3.39%

Postpaid: -13.54%

Prepaid: -1.74%

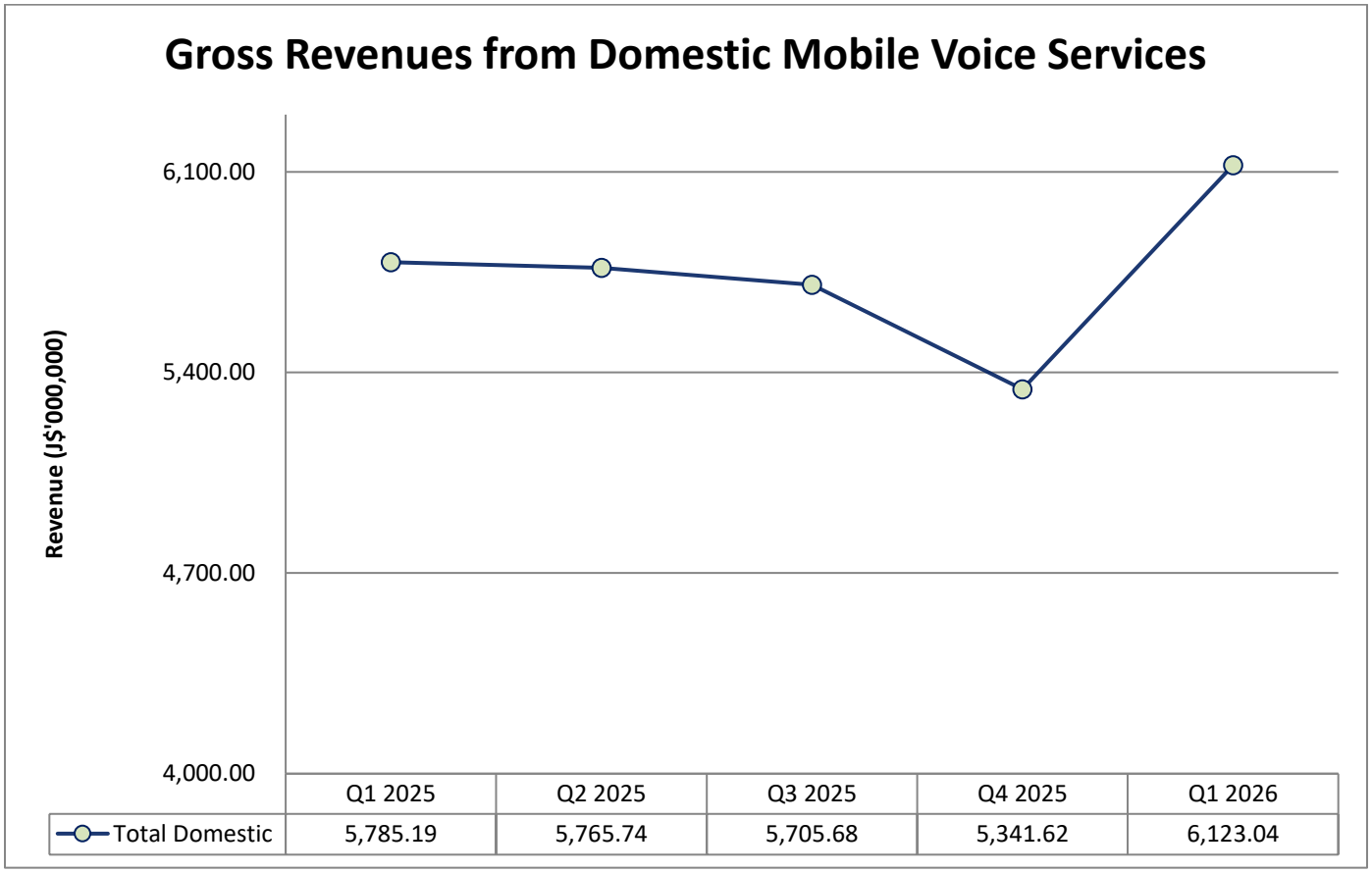
Figure 9: Mobile Voice Services Penetration Rate



% Change: Q1 '26/Q4 '25

-3.39%

Figure 10: Gross Revenues from Domestic Mobile Voice Services[5]

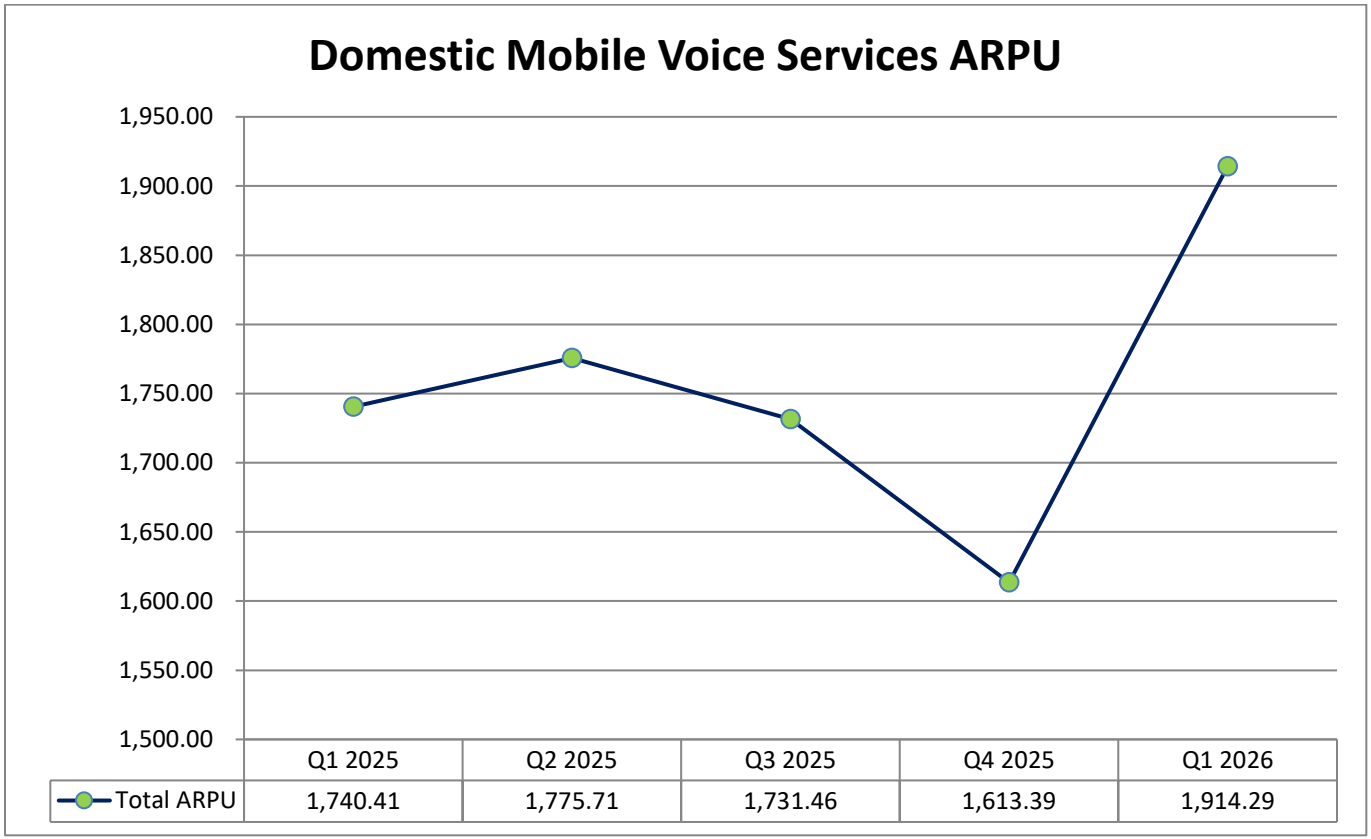


% Change: Q1 '26/Q4 '25

14.63%

[5] Gross revenues from domestic mobile voice services rebounded, largely reflecting the resumption of normal billing by some operators after suspension due to Hurricane Melissa in 2025 October.

Figure 11: Domestic Mobile Voice Services Average Revenue per User (ARPU)[6]

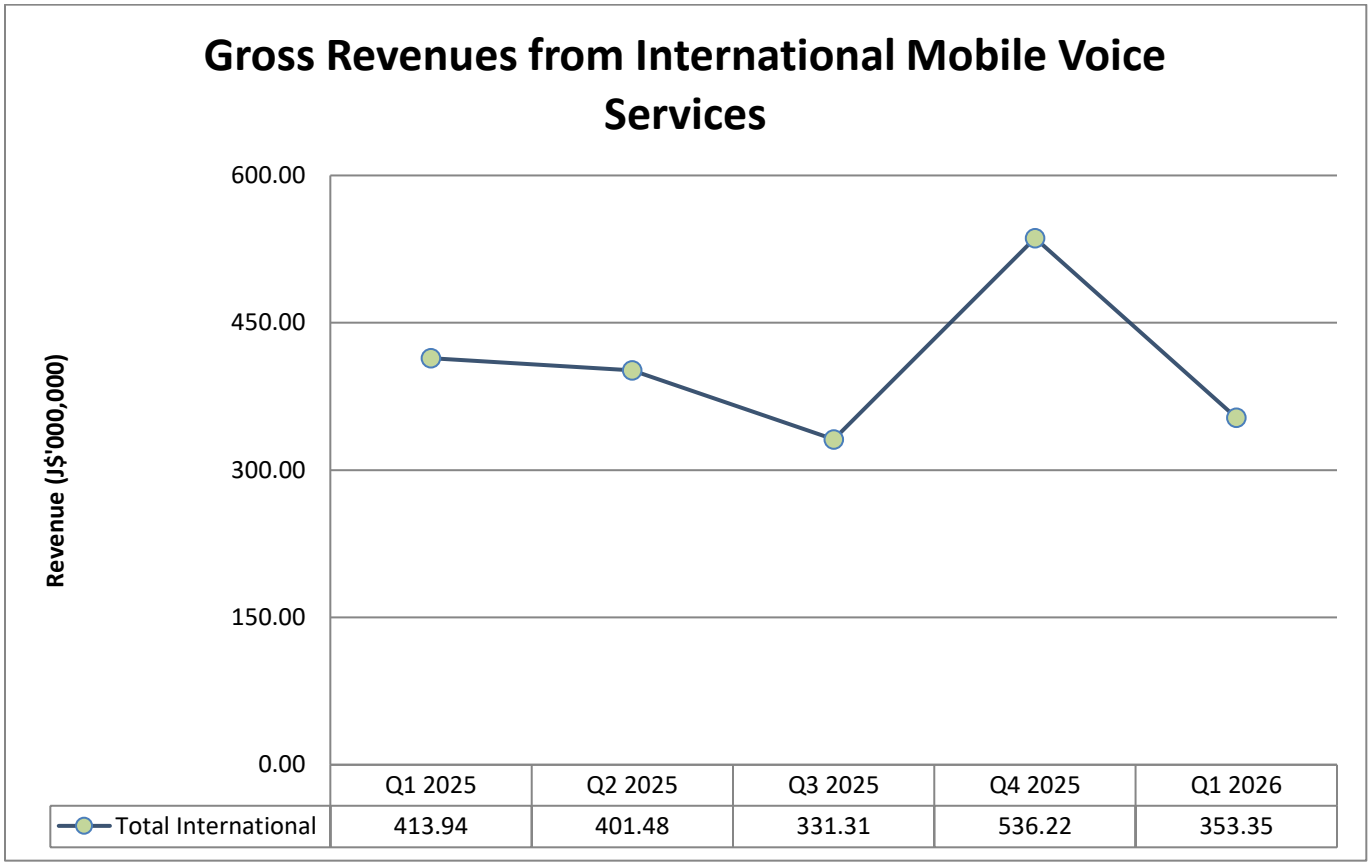


% Change: Q1 '26/Q4 '25

18.65%

[6] The increase in domestic mobile voice services ARPU was largely due to the resumption of normal billing by some operators after suspension due to Hurricane Melissa in 2025 October.

Figure 12: Gross Revenues from International Mobile Voice Services[7]

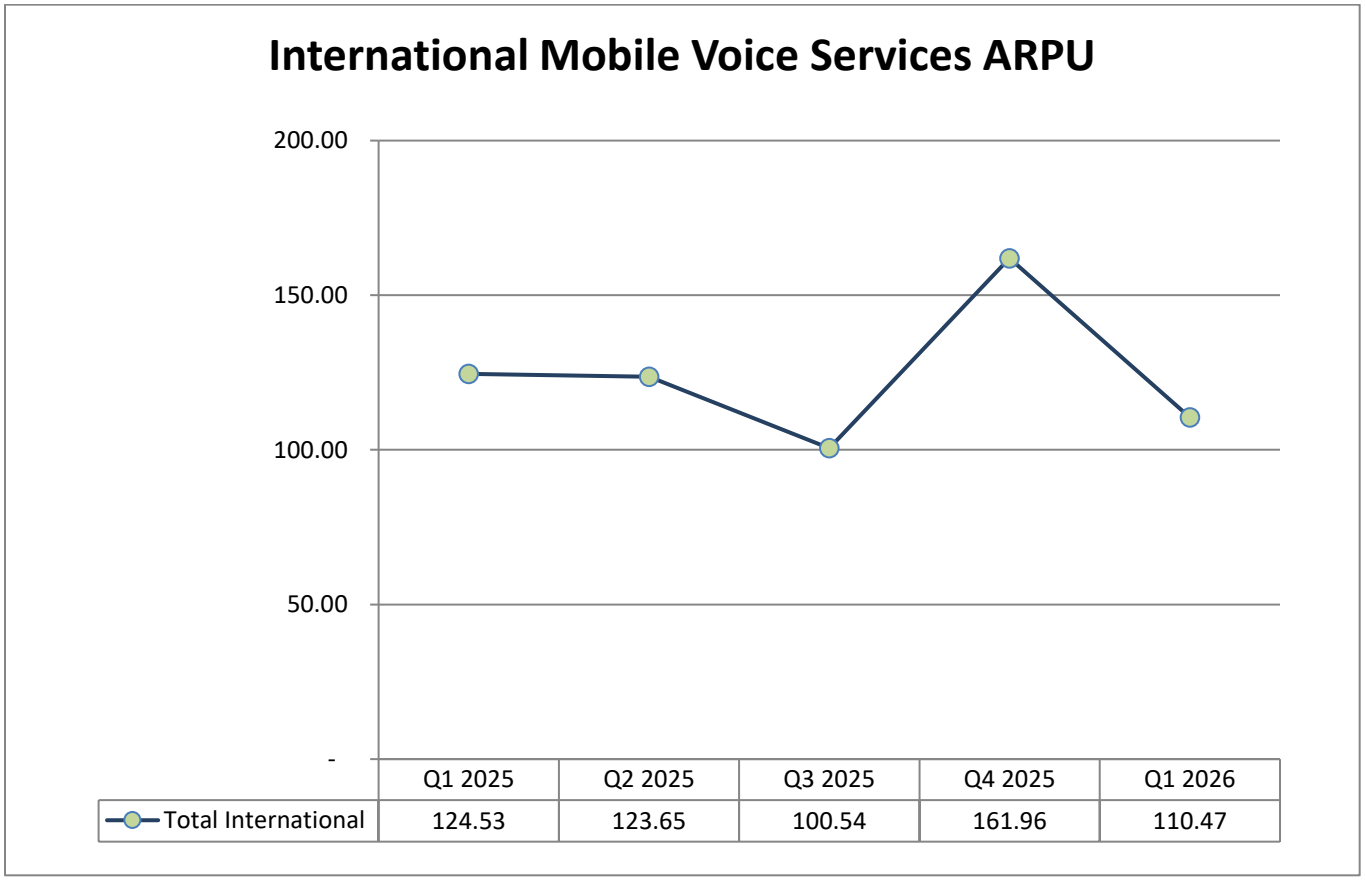


% Change: Q1 '26/Q4 '25

-34.10%

[7] The significant decline in gross revenues from international mobile voice services was due to a reduction in international calls.

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

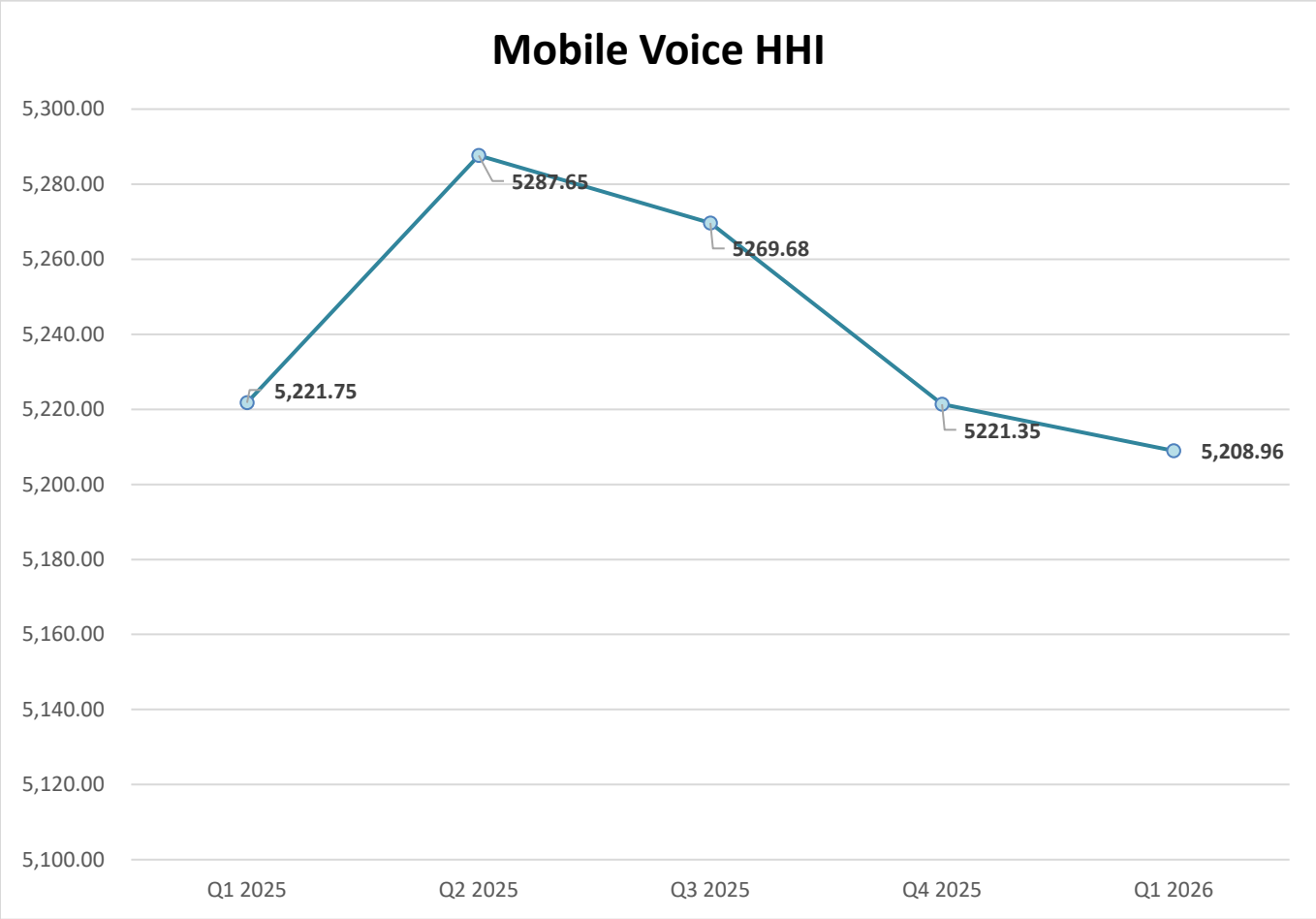


% Change: Q1 '26/Q4 '25

-31.79%

[8] The decline in international mobile voice services ARPU was due to the reduction in gross revenues from international mobile voice services.

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

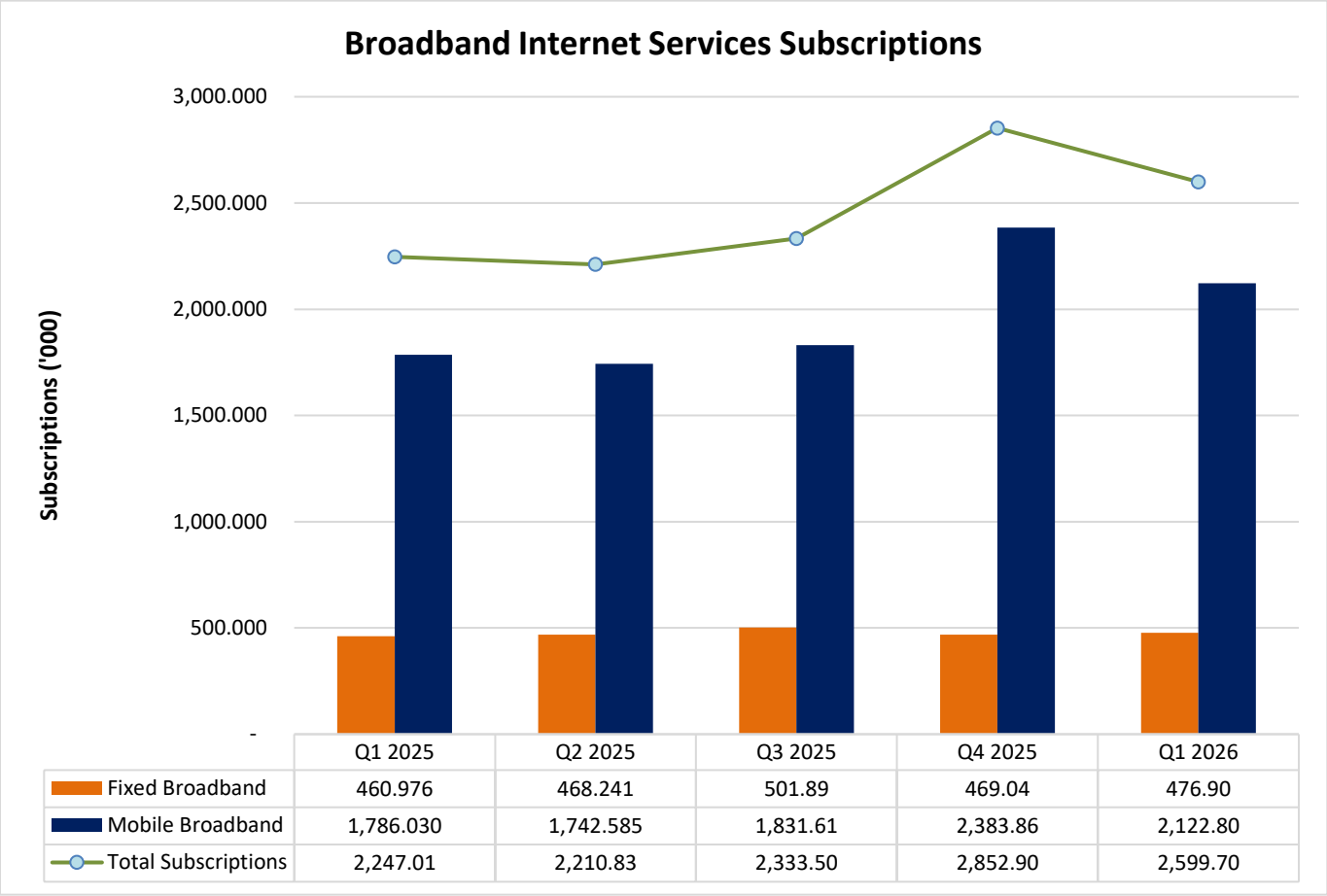


% Change: Q1 '26/Q4 '25

-0.24%

Broadband Internet Data

Figure 15: Broadband Internet Services Subscriptions



	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Fixed Broadband	460.976	468.241	501.89	469.04	476.90
Mobile Broadband	1,786.030	1,742.585	1,831.61	2,383.86	2,122.80
Total Subscriptions	2,247.01	2,210.83	2,333.50	2,852.90	2,599.70

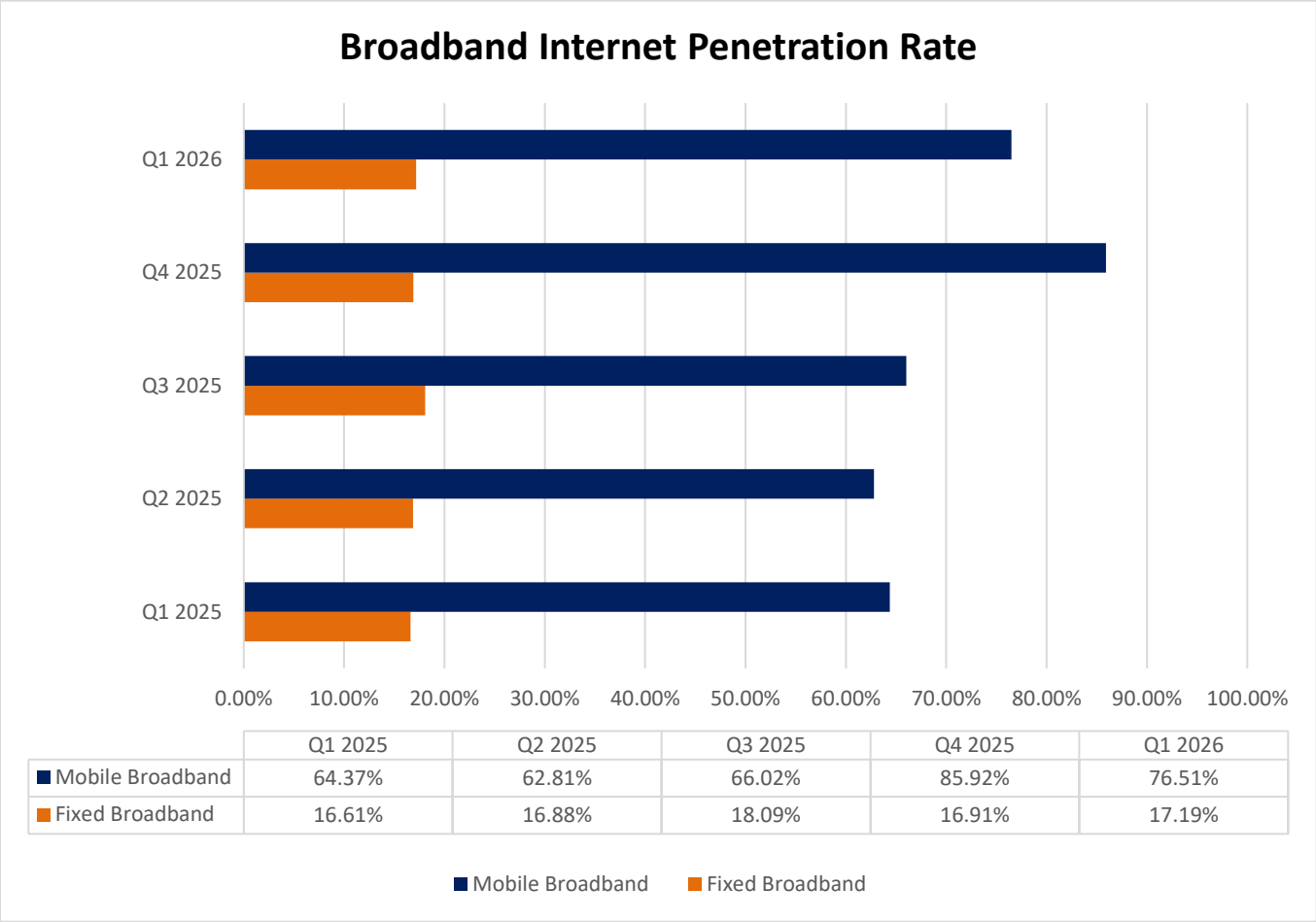
% Change: Q1 '26/Q4 '25

Total Subscriptions: -8.88%

Fixed Broadband: 1.68%

Mobile Broadband: -10.95%

Figure 16: Broadband Internet Penetration Rate



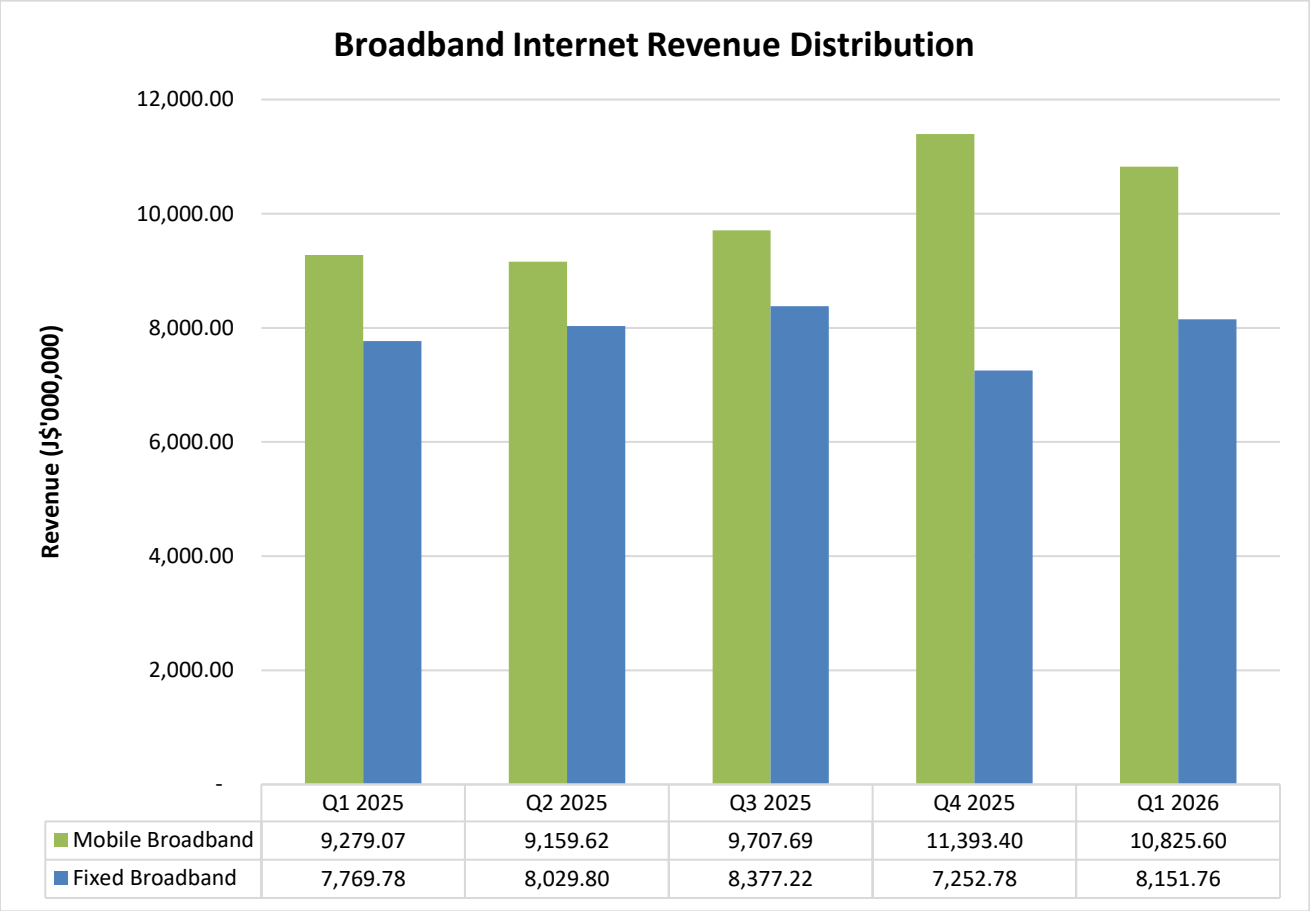
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Mobile Broadband	64.37%	62.81%	66.02%	85.92%	76.51%
Fixed Broadband	16.61%	16.88%	18.09%	16.91%	17.19%

% Change: Q1 '26/Q4 '25

Fixed Broadband: 1.66%

Mobile Broadband: -10.95%

Figure 17: Broadband Internet Revenue Distribution



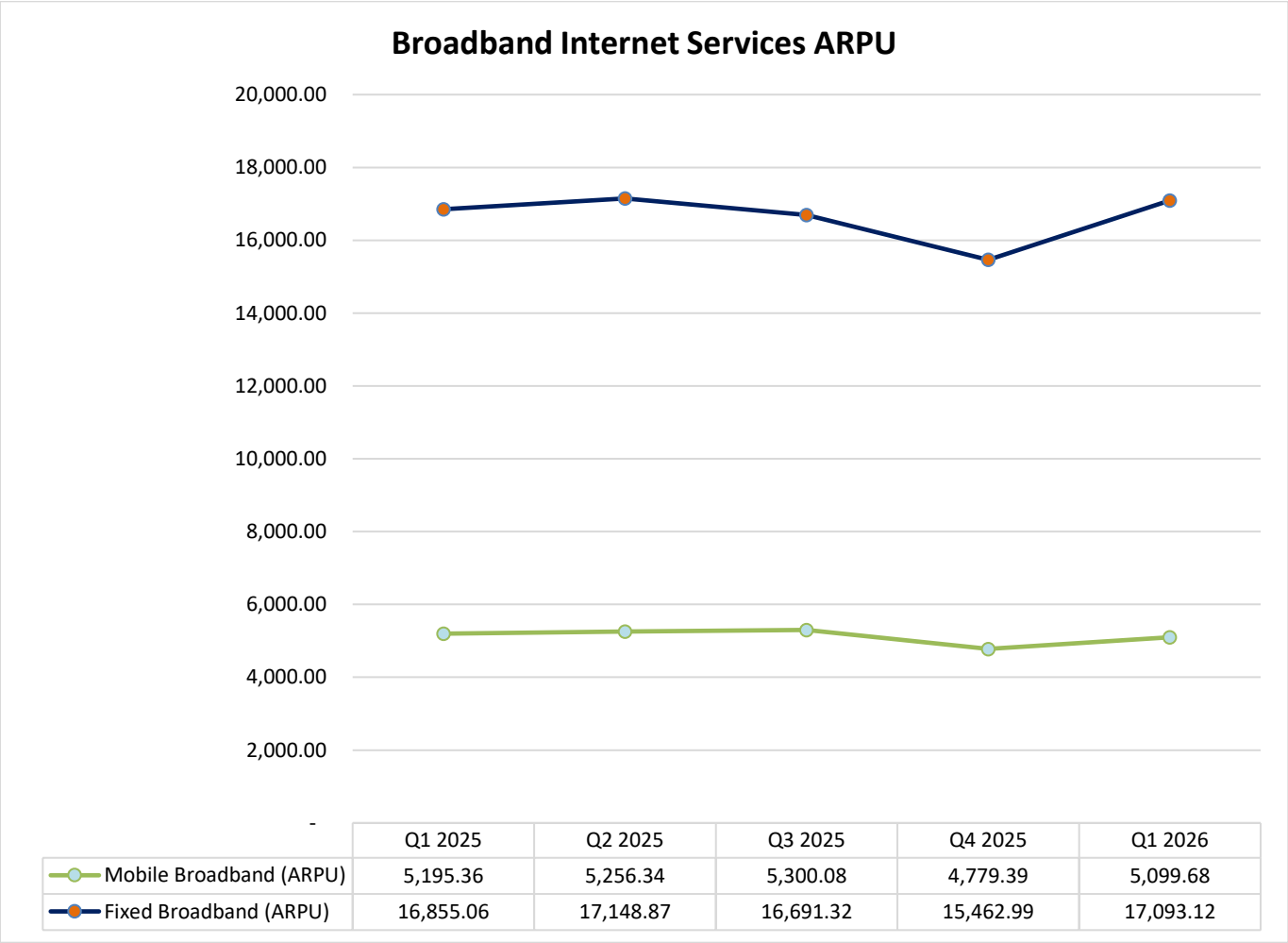
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Mobile Broadband	9,279.07	9,159.62	9,707.69	11,393.40	10,825.60
Fixed Broadband	7,769.78	8,029.80	8,377.22	7,252.78	8,151.76

% Change: Q1 '26/Q4 '25

Fixed Broadband: 12.39%

Mobile Broadband: -4.98%

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



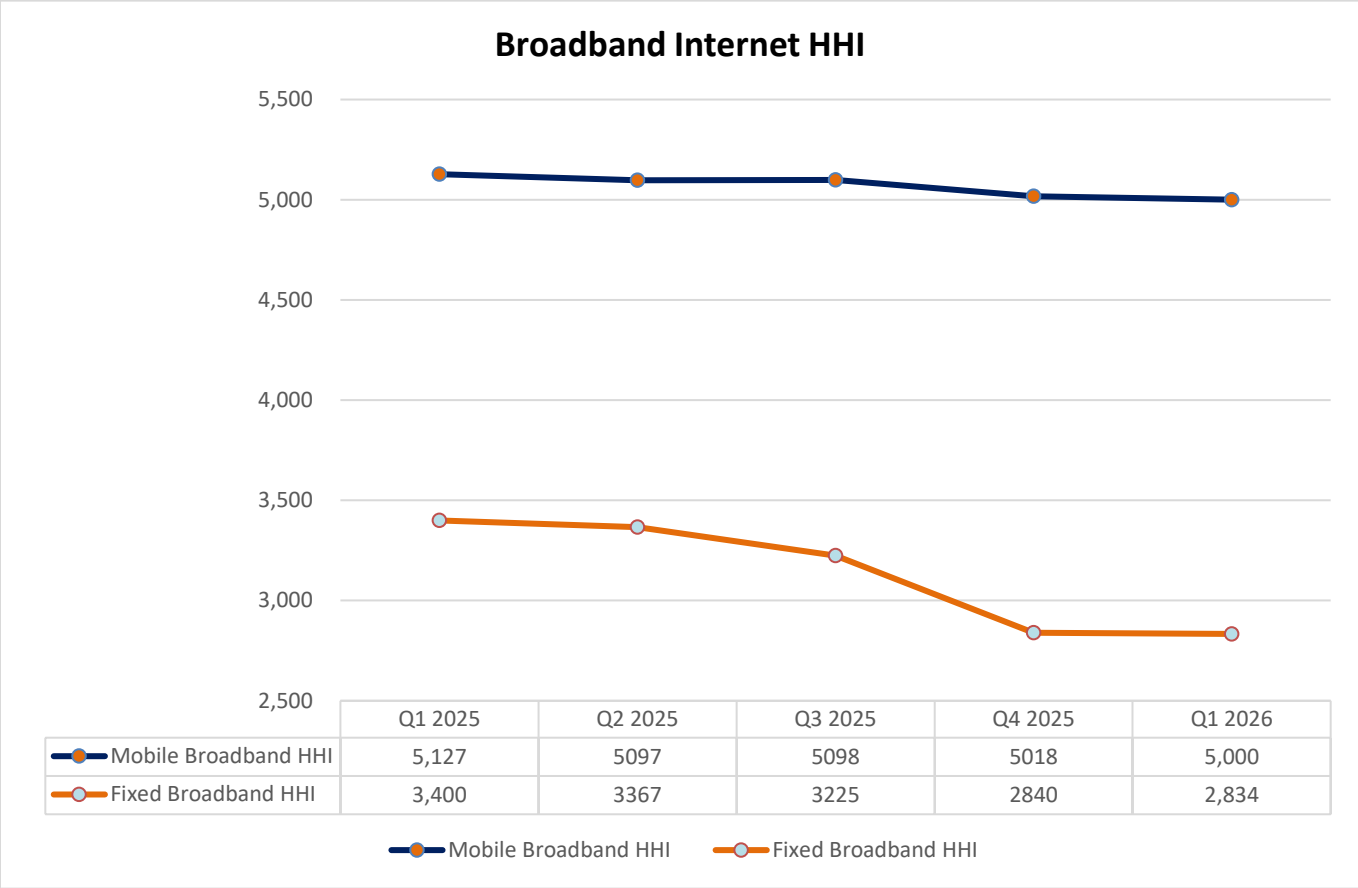
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Mobile Broadband (ARPU)	5,195.36	5,256.34	5,300.08	4,779.39	5,099.68
Fixed Broadband (ARPU)	16,855.06	17,148.87	16,691.32	15,462.99	17,093.12

% Change: Q1 '26/Q4 '25

Fixed Broadband: 10.54%

Mobile Broadband: 6.70%

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



% Change: Q1 '26/Q4 '25

Fixed Broadband: -0.21%

Mobile Broadband: -0.35%

Industry Penetration and Concentration

Penetration Rate[9]

Penetration Rate	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Fixed Voice Subscription Penetration Rate	16.50%	16.78%	16.81%	14.43%	14.60%
Mobile Voice Subscription Penetration Rate	119.81%	117.03%	118.77%	119.33%	115.28%
Fixed Broadband Subscription Penetration Rate	16.61%	16.88%	18.09%	16.91%	17.19%
Mobile Broadband Subscription Penetration Rate	64.37%	62.81%	66.02%	85.92%	76.51%
Total Broadband Subscription Penetration Rate	82.18%	79.68%	84.10%	102.82%	93.70%

Concentration Ratio (Herfindahl-Hirschman Index)[10]

Herfindahl-Hirschman Index (HHI)	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Fixed Voice HHI	3,994	4,019	4,098	3,955	3,944
Mobile Voice HHI	5,222	5,288	5,270	5,221	5,209
Fixed Broadband HHI	3,400	3,367	3,225	2,840	2,834
Mobile Broadband HHI	5,127	5,097	5,098	5,018	5,000

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

[10] Calculated using subscription data.

Appendix

Fixed Voice Services	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	% Change Q1 '26/Q4 '25	% Change Q1 '26/Q1 '25
Total Subscriptions ('000)	457.89	465.55	466.27	400.29	405.17	1.22	-11.51
Gross Domestic Revenue (J$' million)	977.64	996.83	965.64	616.01	814.49	32.22	-16.69
Gross Domestic ARPU	2,135.11	2,141.22	2,071.01	1,538.91	2,010.22	30.63	-5.85
Gross International Revenue (J$' million)	90.40	79.28	92.63	106.40	83.84	-21.21	-7.25
International ARPU	197.42	170.28	198.67	265.82	206.92	-22.15	4.82

Mobile Voice Services	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	% Change Q1 '26/Q4 '25	% Change Q1 '26/Q1 '25
Total Subscriptions ('000)	3,324.04	3,247.01	3,295.29	3,310.79	3,198.59	-3.39	-3.77
Gross Domestic Revenue (J$' million)	5,785.19	5,765.74	5,705.68	5,341.62	6,123.04	14.63	5.84
Gross Domestic ARPU	1,740.41	1,775.71	1,731.46	1,613.39	1,914.29	18.65	9.99
Gross International Revenue (J$' million)	413.94	401.48	331.31	536.22	353.35	-34.10	-14.64
International ARPU	124.53	123.65	100.54	161.96	110.47	-31.79	-11.29

Internet Services	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	% Change Q1 '26/Q4 '25	% Change Q1 '26/Q1 '25
Total Subscriptions ('000)	2,247.01	2,210.83	2,333.50	2,852.90	2,599.70	-8.88	15.70
Fixed Broadband	460.98	468.24	501.89	469.04	476.90	1.68	3.46
Mobile Broadband	1,786.03	1,742.59	1,831.61	2,383.86	2,122.80	-10.95	18.86
Total Revenue (J$' million)	17,048.85	17,189.42	18,084.91	18,646.18	18,977.35	1.78	11.31
Total ARPU	7,587.36	7,775.11	7,750.11	6,535.87	7,299.82	11.69	-3.79

Penetration Rate	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
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Fixed Broadband HHI	3,400	3,367	3,225	2,840	2,834
Mobile Broadband HHI	5,127	5,097	5,098	5,018	5,000