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# Office of Utilities Regulation

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## Telecommunications Market Information Report October – December 2017

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**OFFICE OF UTILITIES REGULATION**

Telecommunications Market Information Report: October - December 2017  
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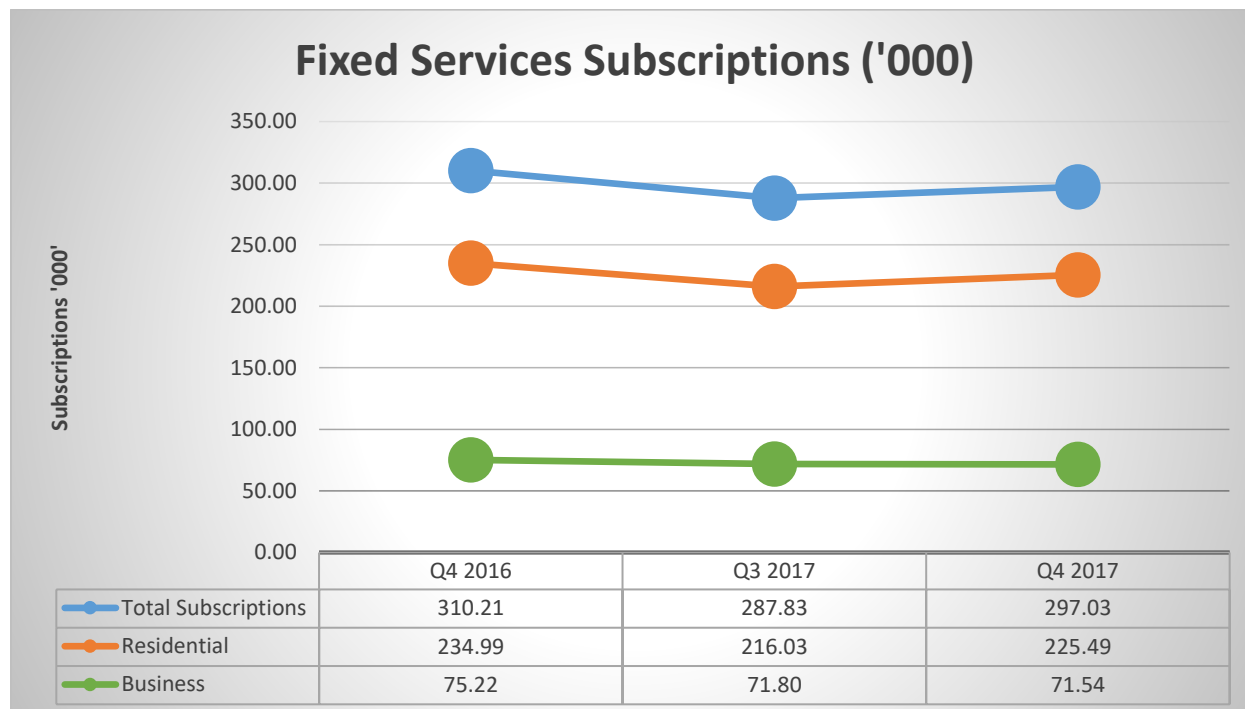
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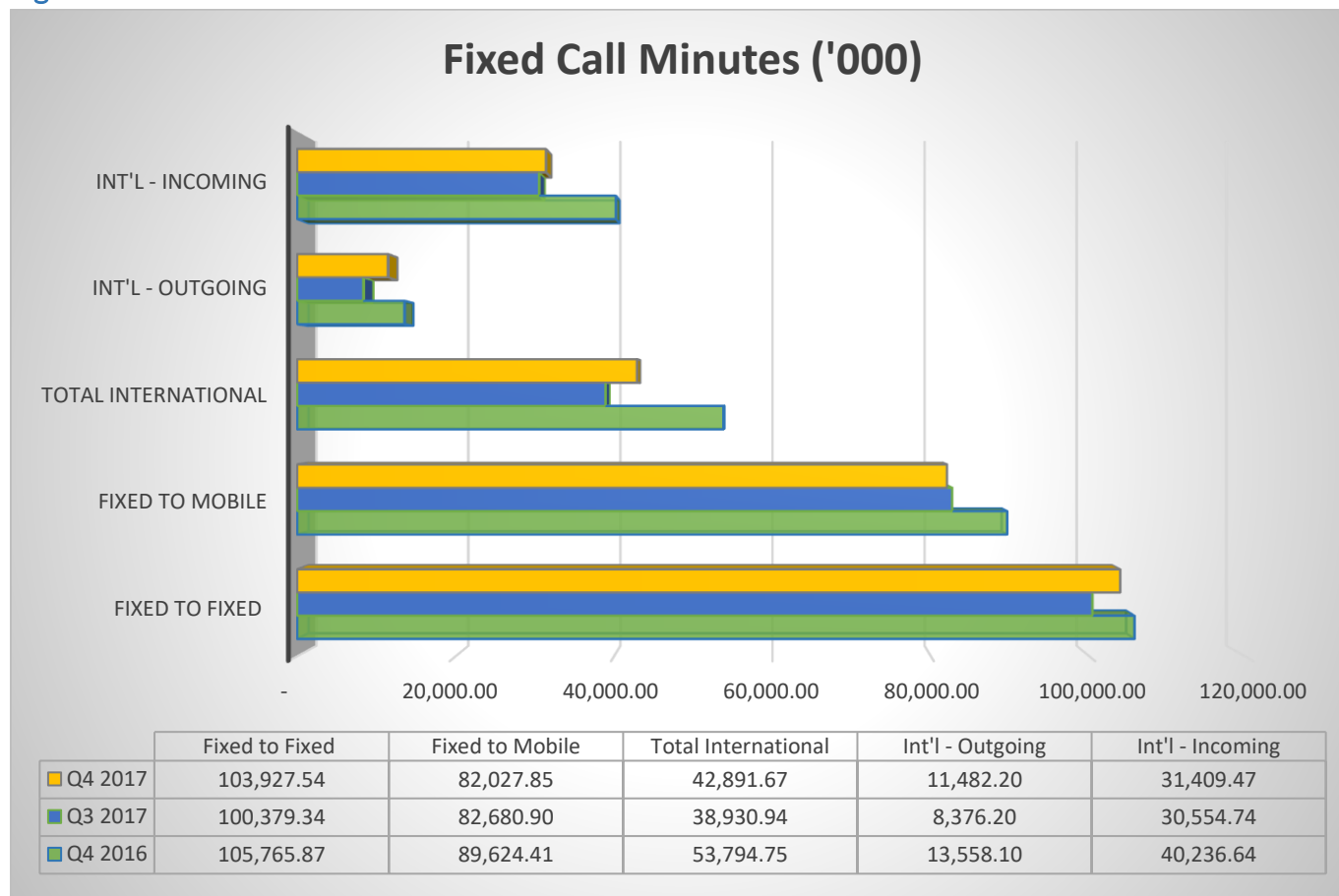
# Fixed Market Data

Figure 1: Fixed Services Subscriptions



<b>% Change: Q4 '17/ Q3 '17</b>	
Total Subscriptions:	3.19%
Residential:	4.38%
Business:	-0.37%

Figure 2: Fixed Call Minutes



**% change: Q4 '17/Q3 '17**

Fixed to Fixed:	3.53%
Fixed to Mobile:	-0.79%
Total International:	10.17%
Int'l - Outgoing:	37.08%
Int'l - Incoming:	2.80%

Figure 3: Fixed Call Revenue Distribution

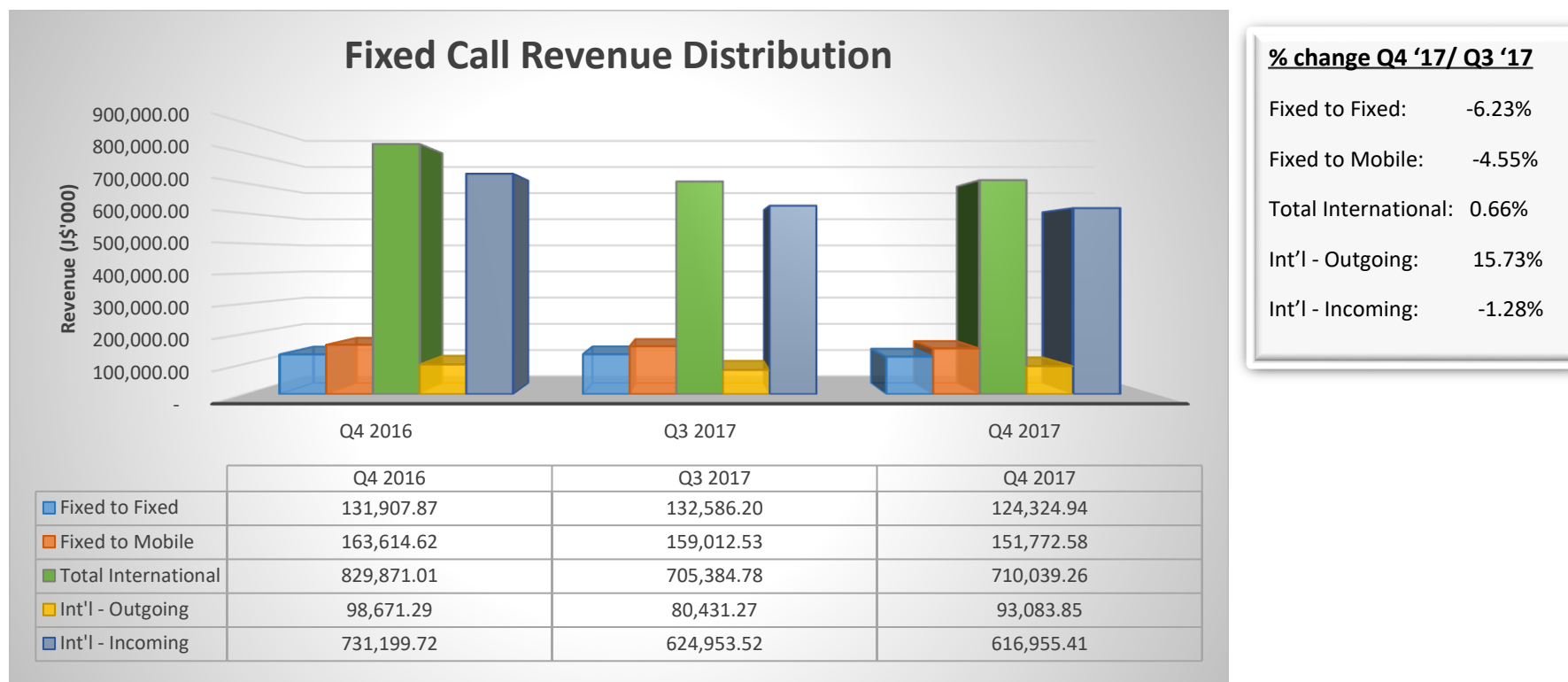
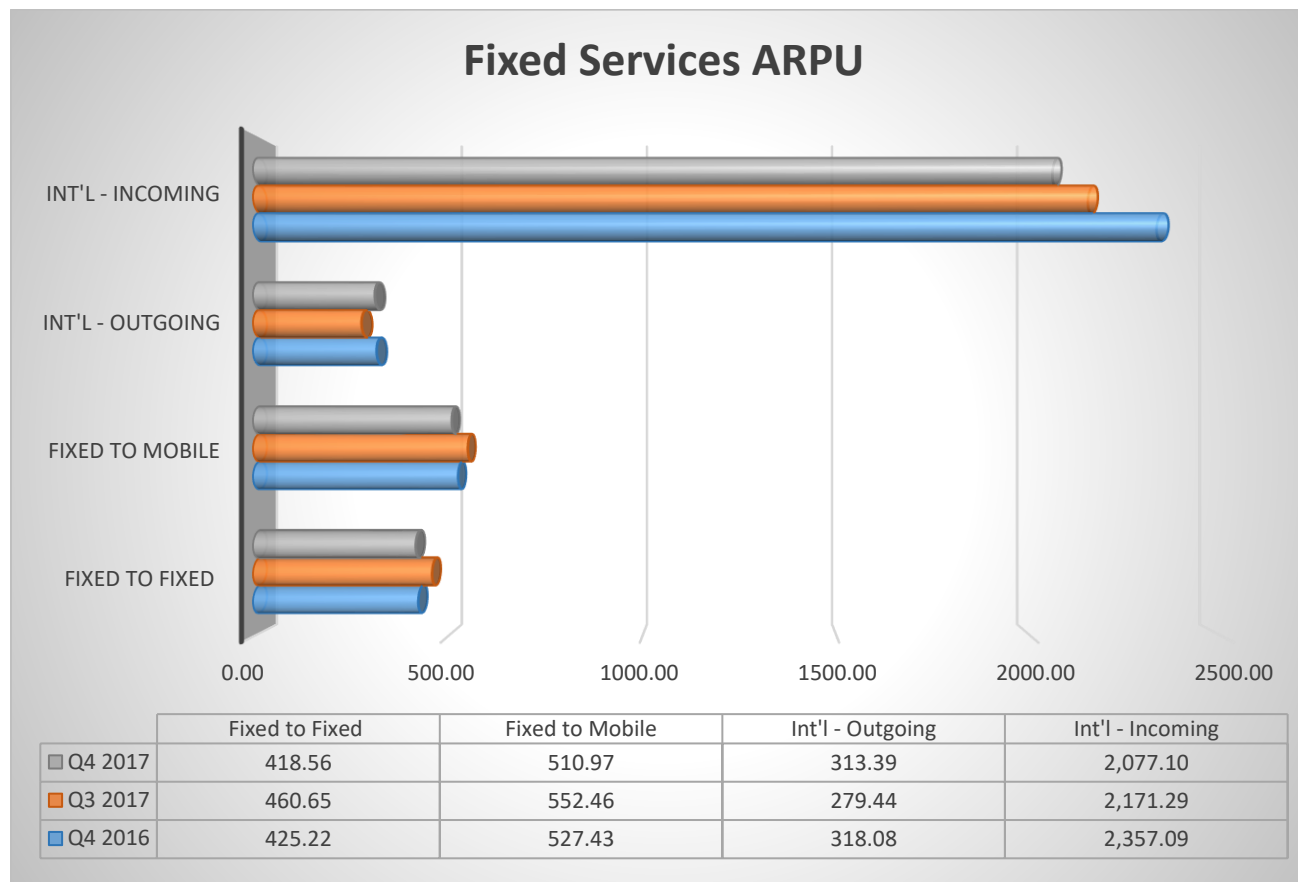


Figure 4: Fixed Services Average Revenue per User (ARPU)

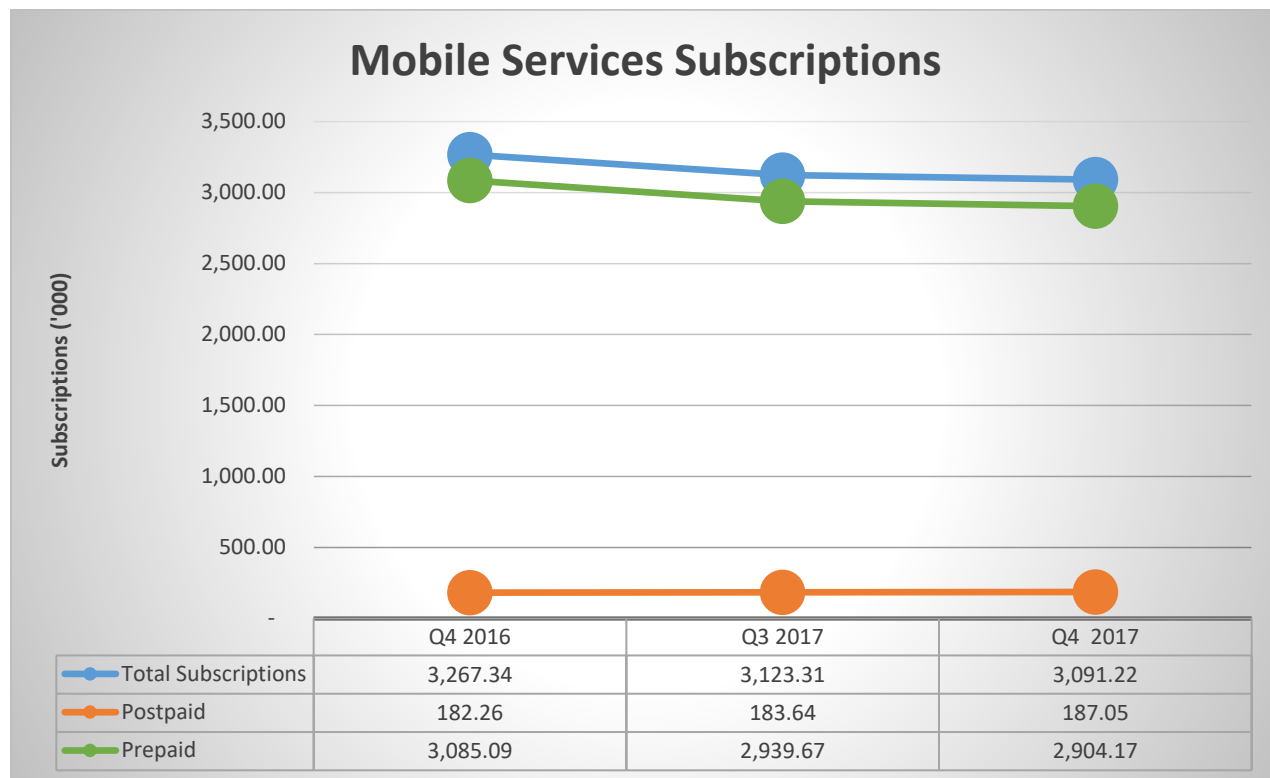


<b>% Change: Q4 '17/ Q3 '17</b>	
Fixed to Fixed:	-9.14%
Fixed to Mobile:	-7.51%
Int'l - Outgoing:	12.15%
Int'l - Incoming:	-4.34%



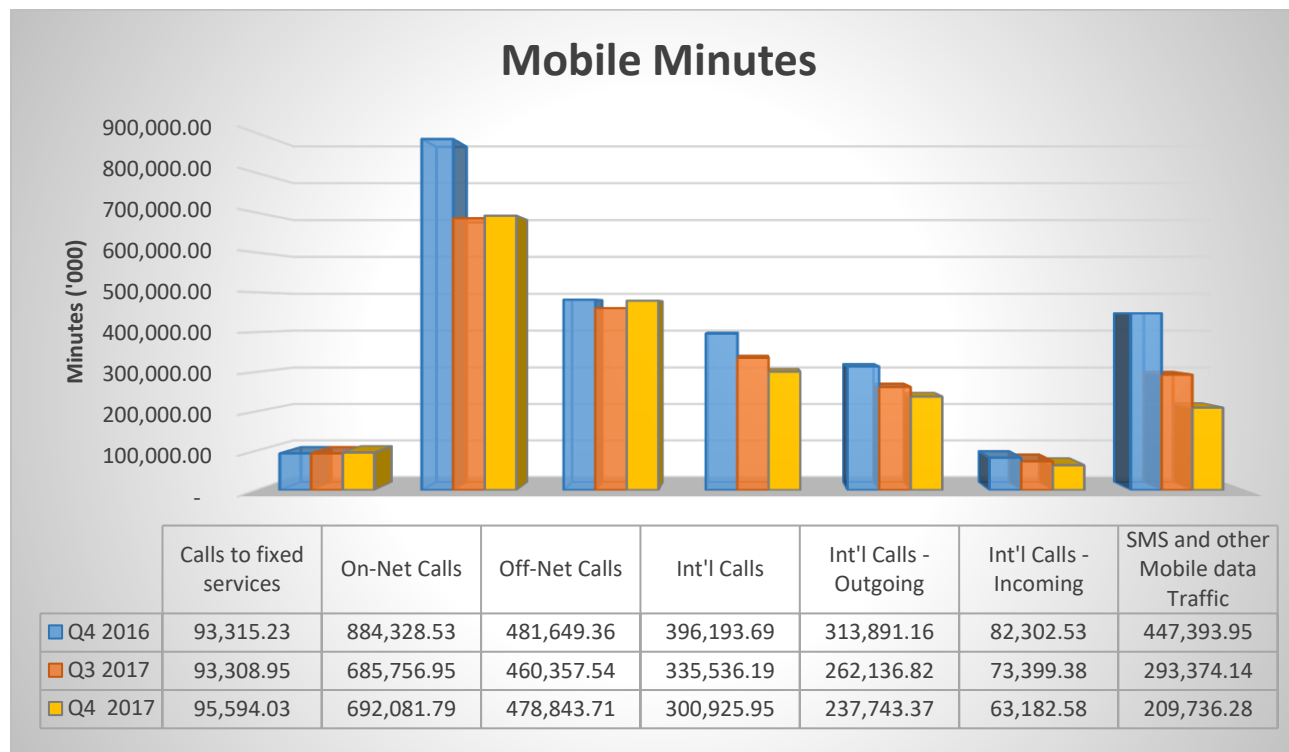
# Mobile Market Data

Figure 5: Mobile Services Subscriptions



<b>% Change: Q4 '17/ Q3 '17</b>	
Total Subscriptions:	-1.03%
Postpaid:	1.86%
Prepaid:	-1.21%

Figure 6: Mobile Minutes



**% Change: Q4 '17/ Q3 '17**

Calls to fixed services: 2.45%

On-Net Calls: 0.92%

Off-Net Calls: 4.02%

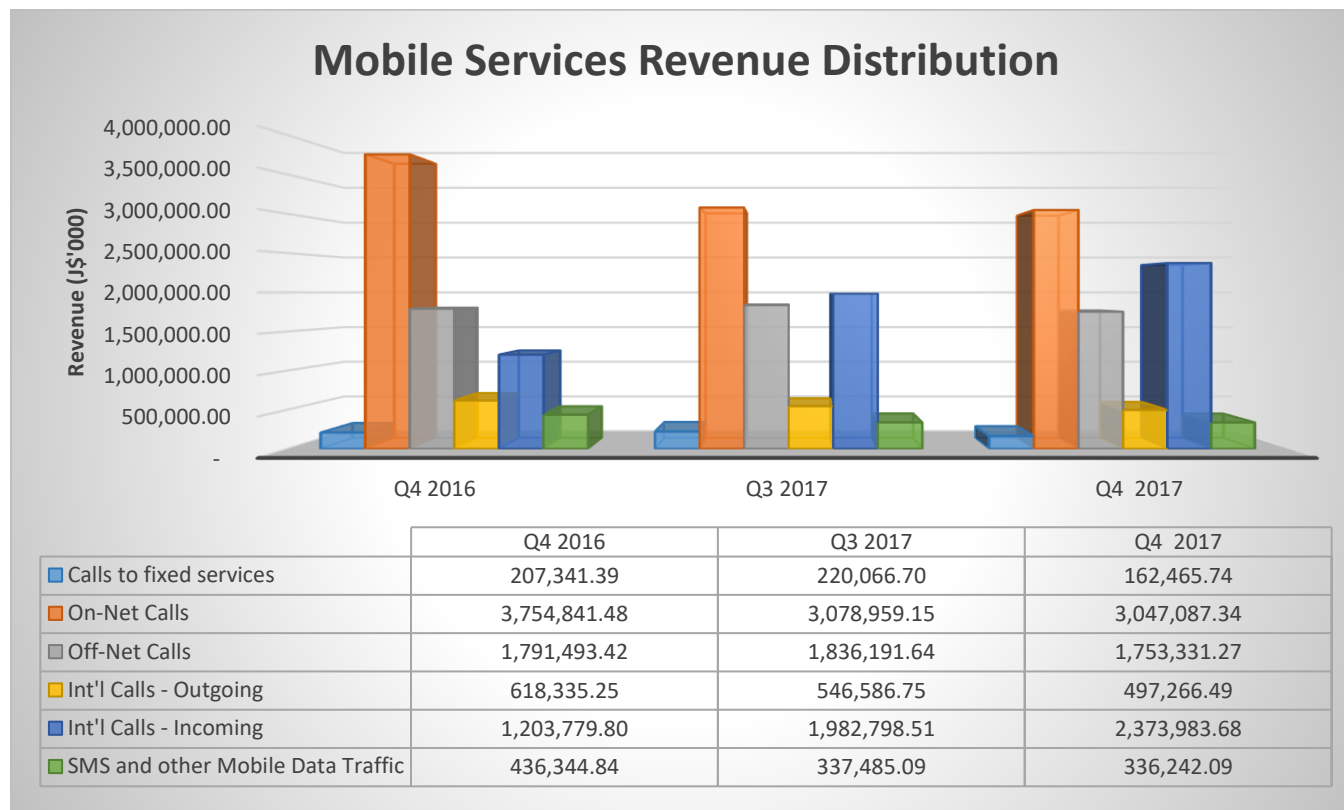
Int'l Calls: -10.31%

Int'l Calls – Outgoing: -9.31%

Int'l Calls – Incoming: -13.92%

SMS & other Mobile Data Traffic: -28.51%

Figure 7: Mobile Services Revenue Distribution



**% Change: Q4 '17/ Q3 '17**

Calls to Fixed services: -26.17%

On-Net Calls: -1.04%

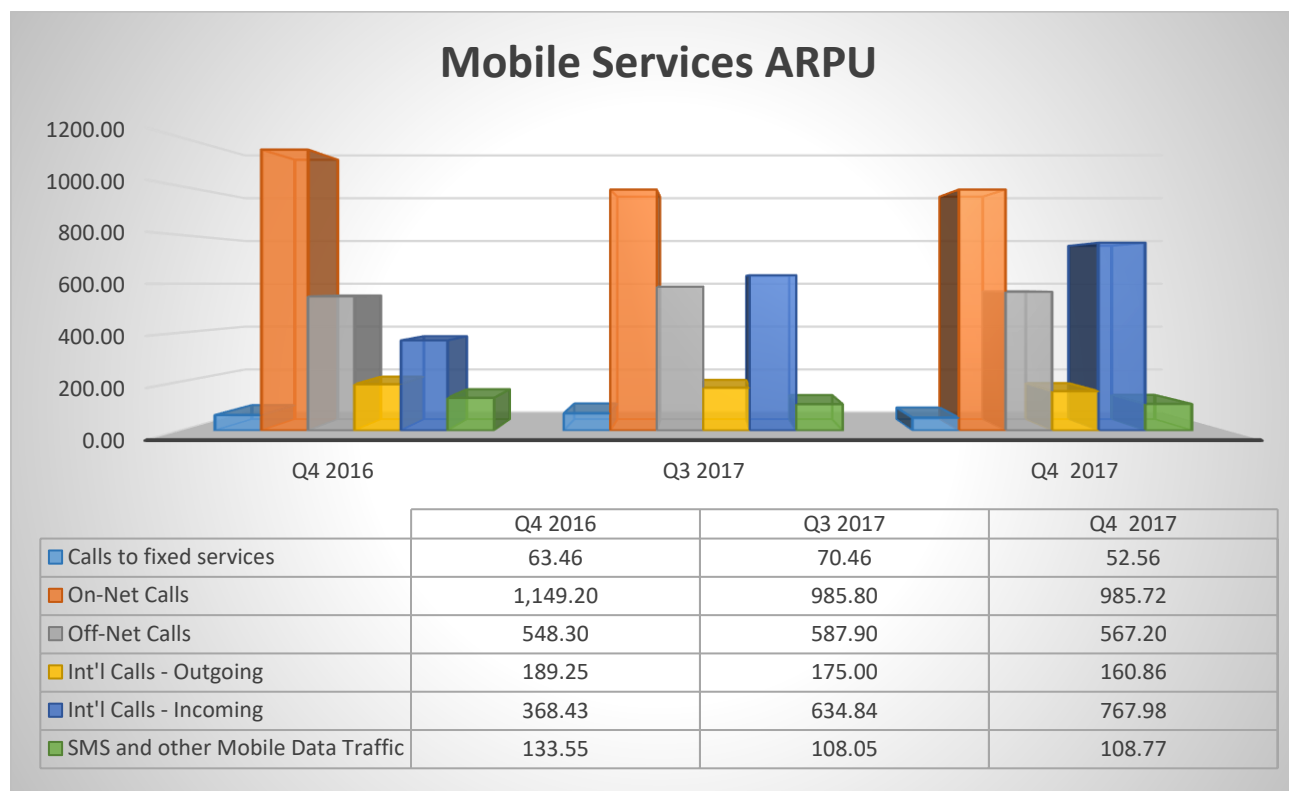
Off-Net Calls: -4.51%

Int'l Calls – Outgoing: -9.02%

Int'l Calls – Incoming: 19.73%

SMS & other Mobile Data  
Traffic: -0.37%

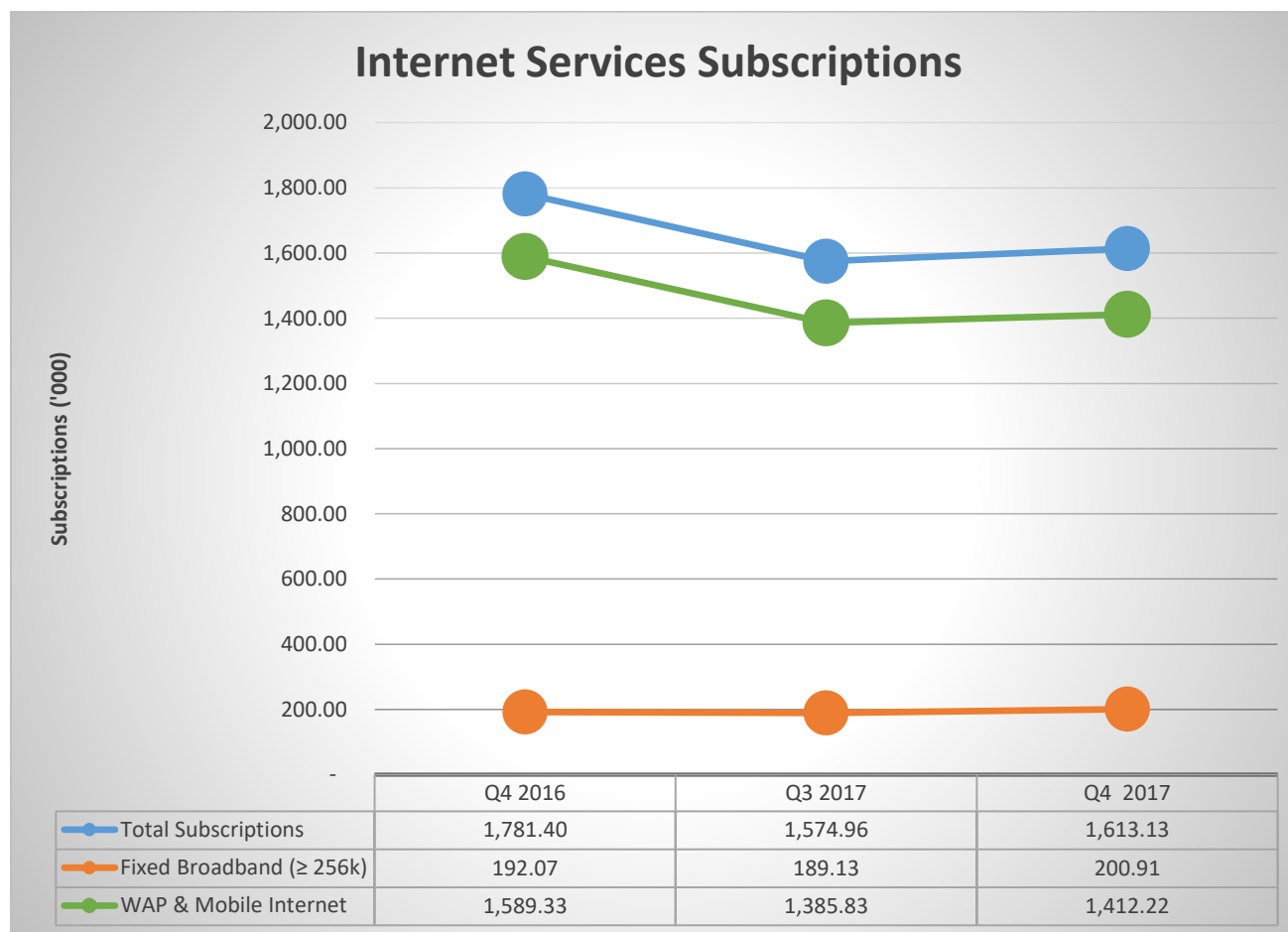
Figure 8: Mobile Services Average Revenue per User (ARPU)



<u>% Change Q4 '17/ Q3 '17</u>	
Calls to fixed service:	-25.41%
On-Net Calls:	-0.01%
Off-Net Calls:	-3.52%
Int'l Calls – Outgoing:	-8.08%
Int'l Calls – Incoming:	20.97%
SMS & other Mobile Data Traffic:	0.67%

# Internet Market Data

Figure 9: Internet Services Subscriptions



<u>% Change Q4 '17/ Q3 '17</u>	
Total Subscriptions:	2.42%
Fixed Broadband (≥ 256k):	6.23%
WAP & Mobile Internet:	1.90%

# Industry Penetration and Concentration



## Penetration Rate<sup>1</sup>

Penetration Rate	Q4 2016	Q3 2017	Q4 2017
Fixed Subscription Penetration Rate	11.39%	10.20%	10.91%
Mobile Subscription Penetration Rate	120%	115%	114%
Fixed Broadband Subscription Penetration Rate	7%	7%	7%
Mobile Broadband Subscription Penetration Rate	58%	51%	52%
Total Broadband Subscription Penetration Rate	65%	58%	59%

## Concentration Ratio (Herfindahl-Hirschman Index)<sup>2</sup>

Herfindahl-Hirschman Index (HHI)	Q4 2016	Q3 2017	Q4 2017
Fixed HHI	7,038	6,288	6,262
Mobile HHI	5,749	5,689	5,607
Fixed Broadband HHI	5,000	5,027	5,021
Mobile Broadband HHI	6,184	5,971	5,736

<sup>1</sup> Calculated using population year end 2014 data from the Statistical Institute of Jamaica: 2,723,246.

<sup>2</sup> Calculated using subscription data.

# Appendix

Fixed Market	Q4 2016	Q3 2017	Q4 2017	% Change Q4 '17/Q3 '17	% Change Q4'17/Q4 '16
Total Subscriptions ('000)	310.21	287.83	297.03	3.19	-4.25
Fixed to Fixed ('000 minutes)	105,765.87	100,379.34	103,927.54	3.53	-1.74
Fixed to Mobile Calls ('000 minutes)	89,621.41	82,680.90	82,027.85	-0.79	-8.48
Total International Calls ('000 minutes)	53,794.75	38,930.94	42,891.67	10.17	-20.27
Outgoing International Calls ('000 minutes)	13,558.10	8,376.20	11,482.20	37.08	-15.31
Incoming International Calls ('000 minutes)	40,236.64	30,554.74	31,409.47	2.80	-21.94
Total Revenue (J\$' million)	2,291.93	2,268.32	2,285.98	0.78	-0.26

Mobile Market	Q4 2016	Q3 2017	Q4 2017	% Change Q4 '17/Q3 '17	% Change Q4 '17/Q4 '16
Total Subscriptions ('000)	3,267.34	3,123.31	3,091.22	-1.03	-5.39
On-Net Calls ('000 minutes)	884,328.53	685,756.95	692,081.79	0.92	-21.74
Off-Net Calls ('000 minutes)	481,649.36	460,357.54	478,843.71	4.02	-0.58
International calls	396,193.69	335,536.19	300,925.95	-10.31	-24.05
Outgoing International ('000 minutes)	313,891.16	262,136.82	237,743.37	-9.31	-24.26
Incoming International ('000 minutes)	82,302.53	73,399.38	63,182.58	-13.92	-23.23
SMS and other mobile data traffic	447,393.95	293,374.14	209,736.28	-28.51	-53.12
Total Revenue (J\$ ' million)	12,871.34	13,341.18	13,089.75	-1.88	1.70

Internet Market	Q4 2016	Q3 2017	Q4 2017	% Change Q4 '17/Q3'17	% Change Q4'17/Q4 '16
Total Subscriptions ('000)	1,781.40	1,574.96	1,613.13	2.42	-9.45
Fixed Broadband (≥256K)	192.07	189.13	200.91	6.23	4.60
WAP & Mobile Internet	1,589.33	1,385.83	1,412.22	1.90	-11.14
Total Revenue (J\$' million)	5,727.17	6,121.49	5,986.83	-2.20	4.53

<b>Penetration Rate</b>	<b>Q4 2016</b>	<b>Q3 2017</b>	<b>Q4 2017</b>
<b>Fixed Subscription Penetration Rate</b>	11.39%	10.20%	10.91%
<b>Mobile Subscription Penetration Rate</b>	120%	115%	114%
<b>Fixed Broadband Subscription Penetration Rate</b>	7%	7%	7%
<b>Mobile Broadband Subscription Penetration Rate</b>	58%	51%	52%
<b>Total Broadband Subscription Penetration Rate</b>	65%	58%	59%

<b>Herfindahl-Hirschman Index (HHI)</b>	<b>Q4 2016</b>	<b>Q3 2017</b>	<b>Q4 2017</b>
<b>Fixed HHI</b>	7,038	6,288	6,262
<b>Mobile HHI</b>	5,749	5,689	5,607
<b>Fixed Broadband HHI</b>	5,000	5,027	5,021
<b>Mobile Broadband HHI</b>	6,184	5,971	5,736