
Office of Utilities Regulation

Telecommunications Market Information Report July – September 2015



OFFICE OF UTILITIES REGULATION

Telecommunications Market Information Report: July – September 2015

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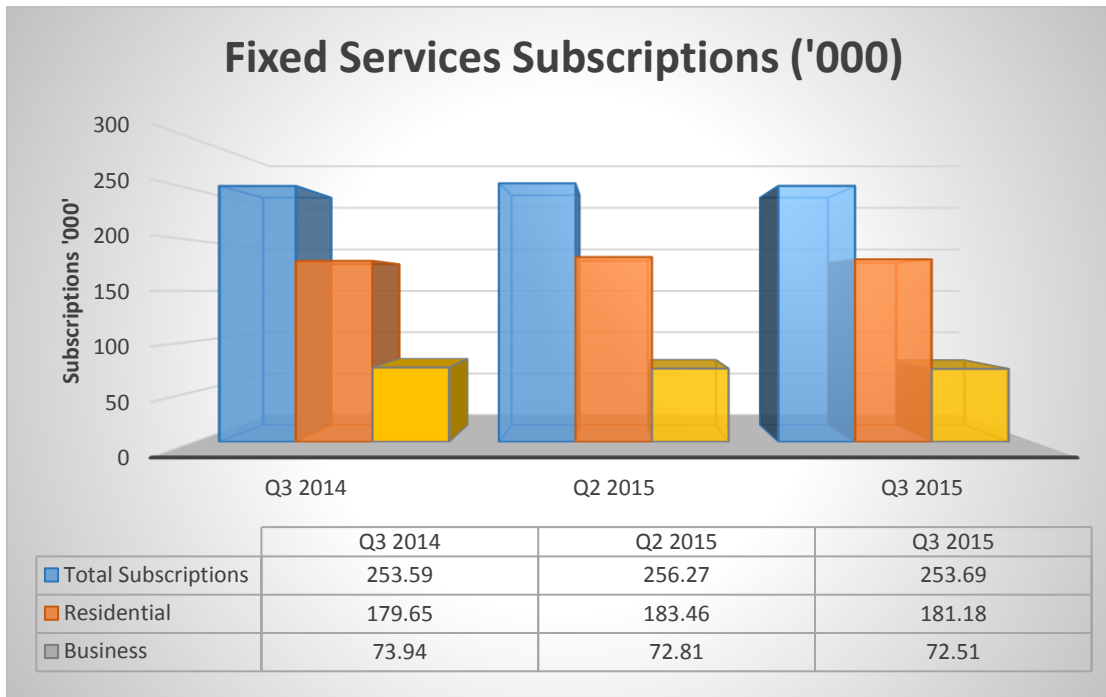
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Fixed Market Data

Figure 1 Fixed Services Subscriptions



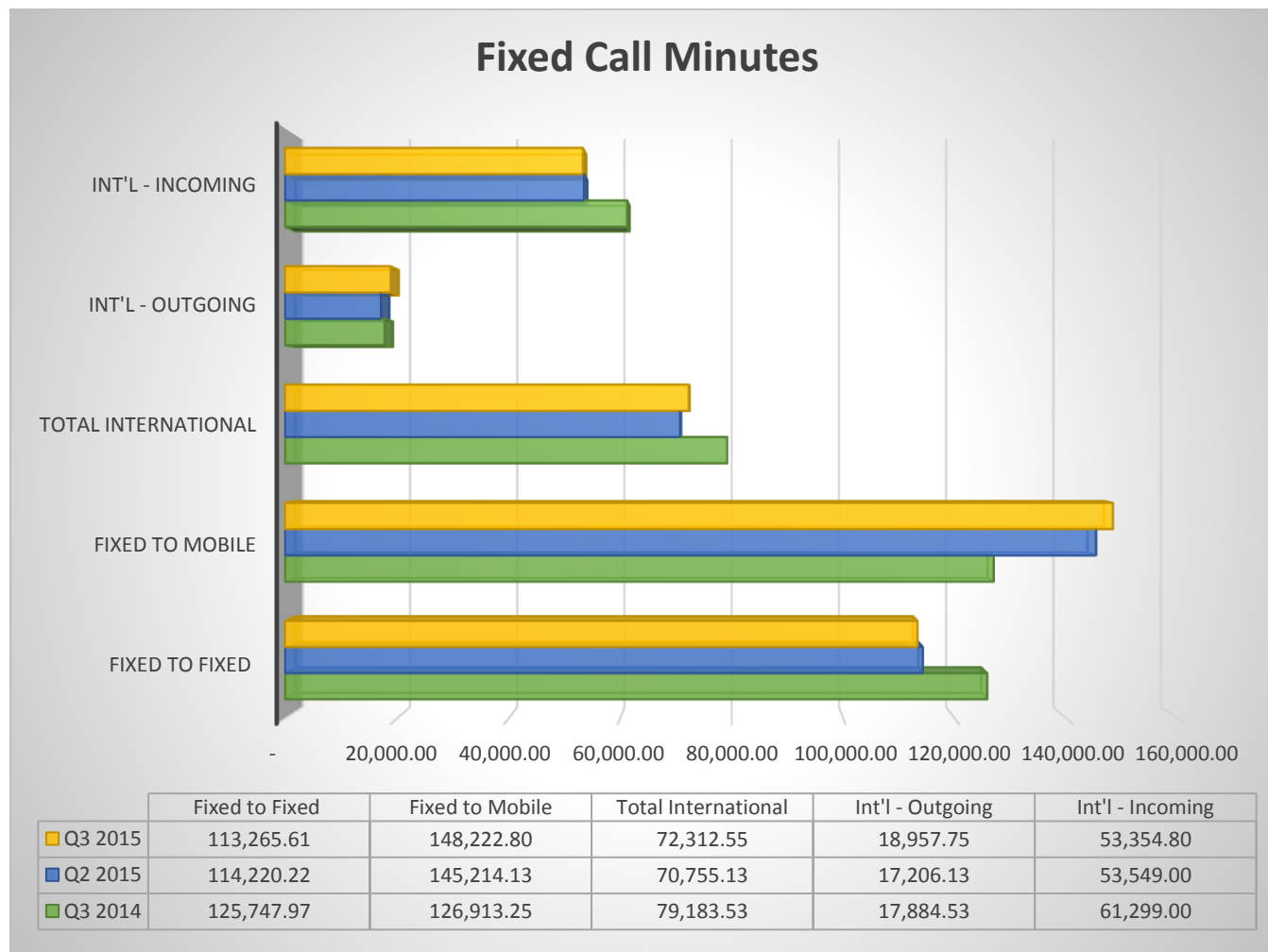
% Change: Q3 '15/ Q2 '15

Total Subscriptions: - 1.01%

Residential: - 1.24%

Business: - 0.41%

Figure 2: Fixed Call Minutes



% change: Q3 '15/Q2 '15

Fixed to Fixed: -0.84%

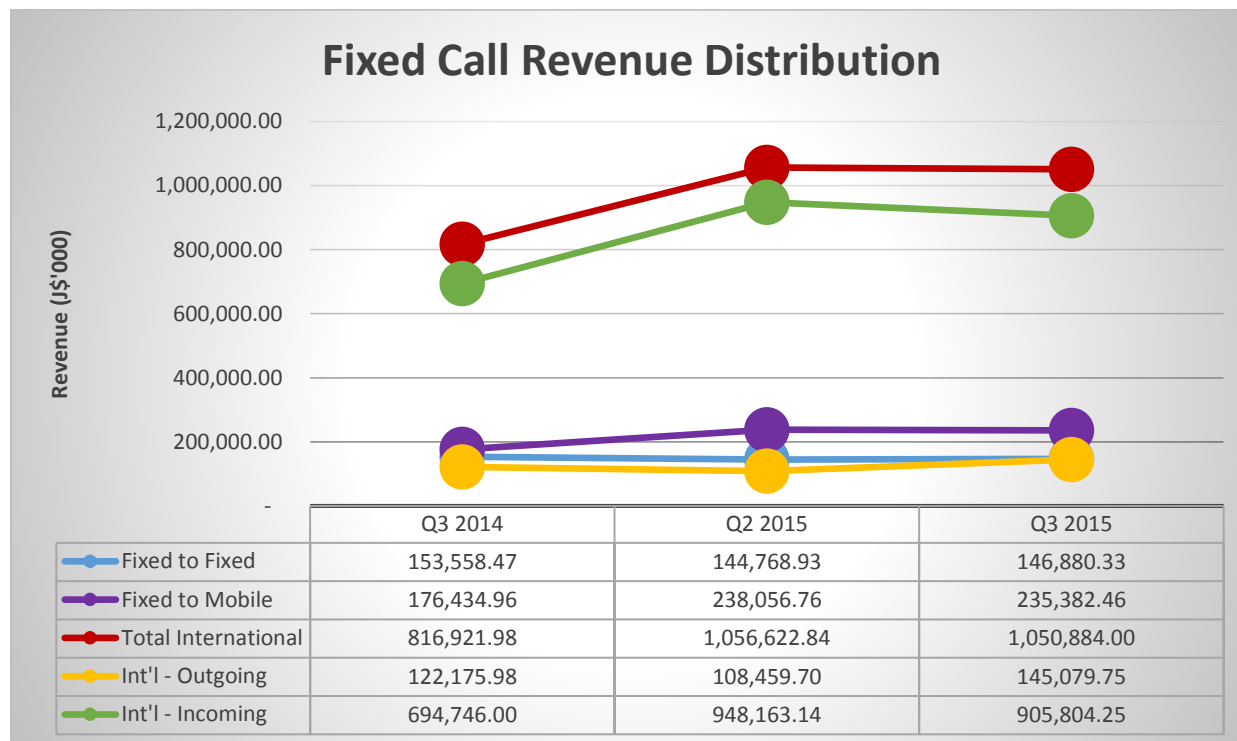
Fixed to Mobile: 2.07%

Total International: 2.20%

Int'l - Outgoing: 10.18%

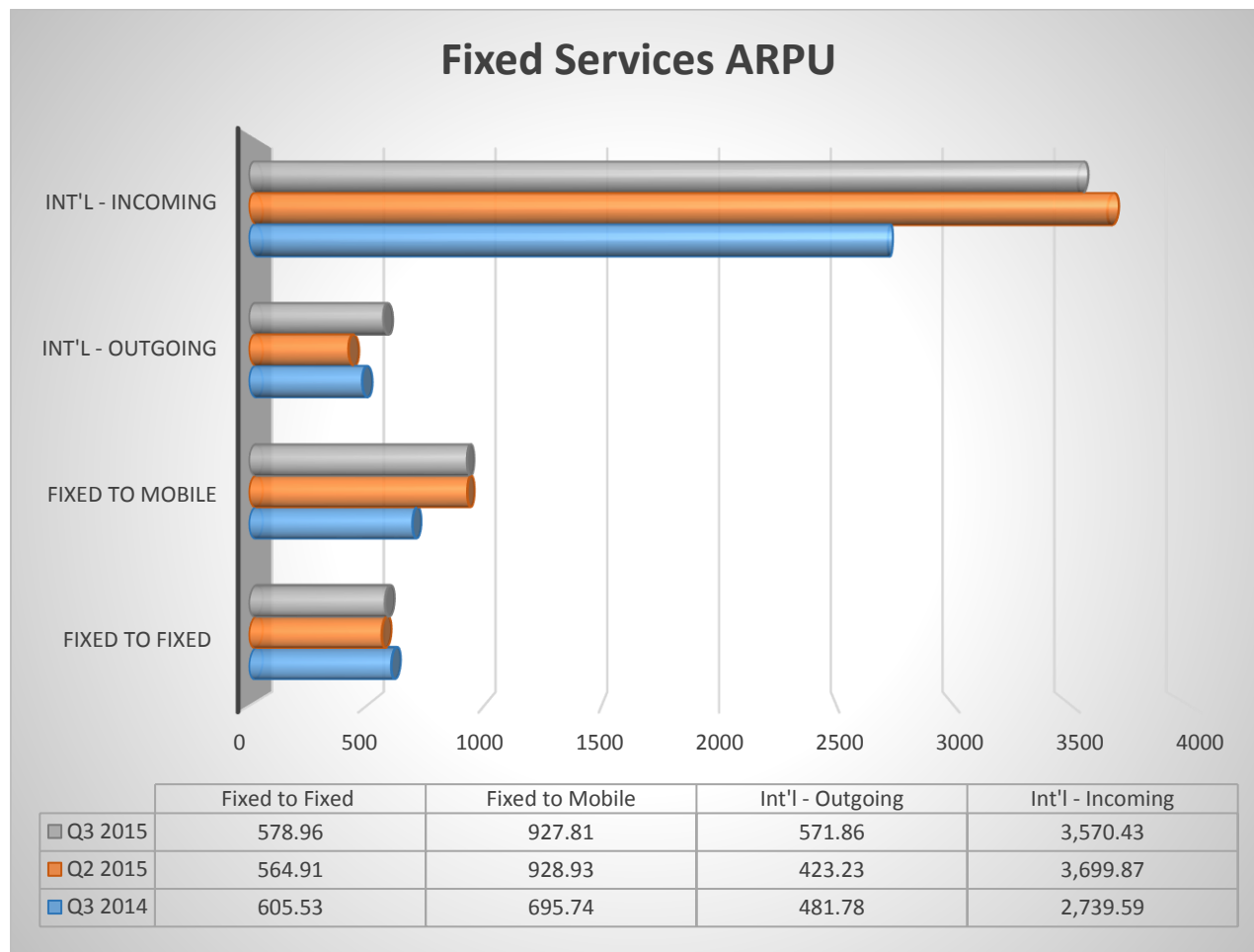
Int'l - Incoming: -0.36%

Figure 3: Fixed Call Revenue Distribution



<u>% change Q3 '15/ Q2 '15</u>
Fixed to Fixed: 1.46%
Fixed to Mobile: -1.12%
Total International: -0.54%
Int'l - Outgoing: 33.76%
Int'l - Incoming: -4.47%

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



% Change: Q3 '15/ Q2 '15

Fixed to Fixed: 2.49%

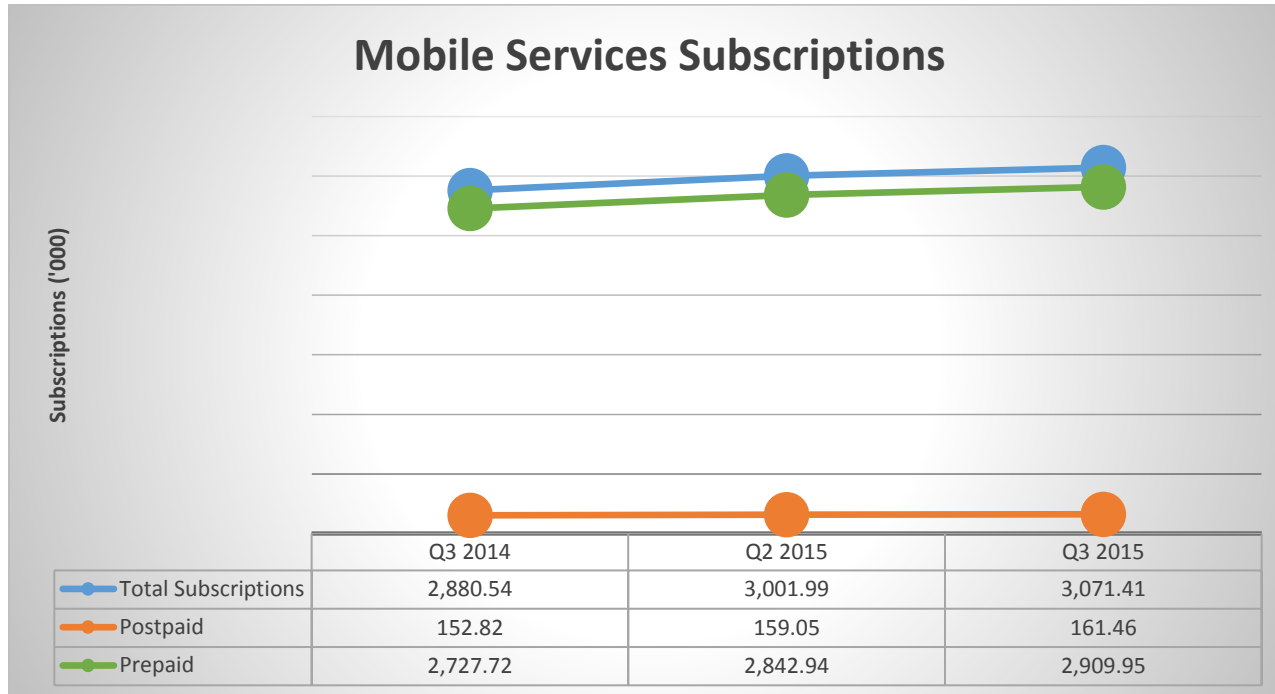
Fixed to Mobile: -0.12%

Int'l - Outgoing: 35.12%

Int'l - Incoming: -3.50%

Mobile Market Data

Figure 5: Mobile Services Subscriptions



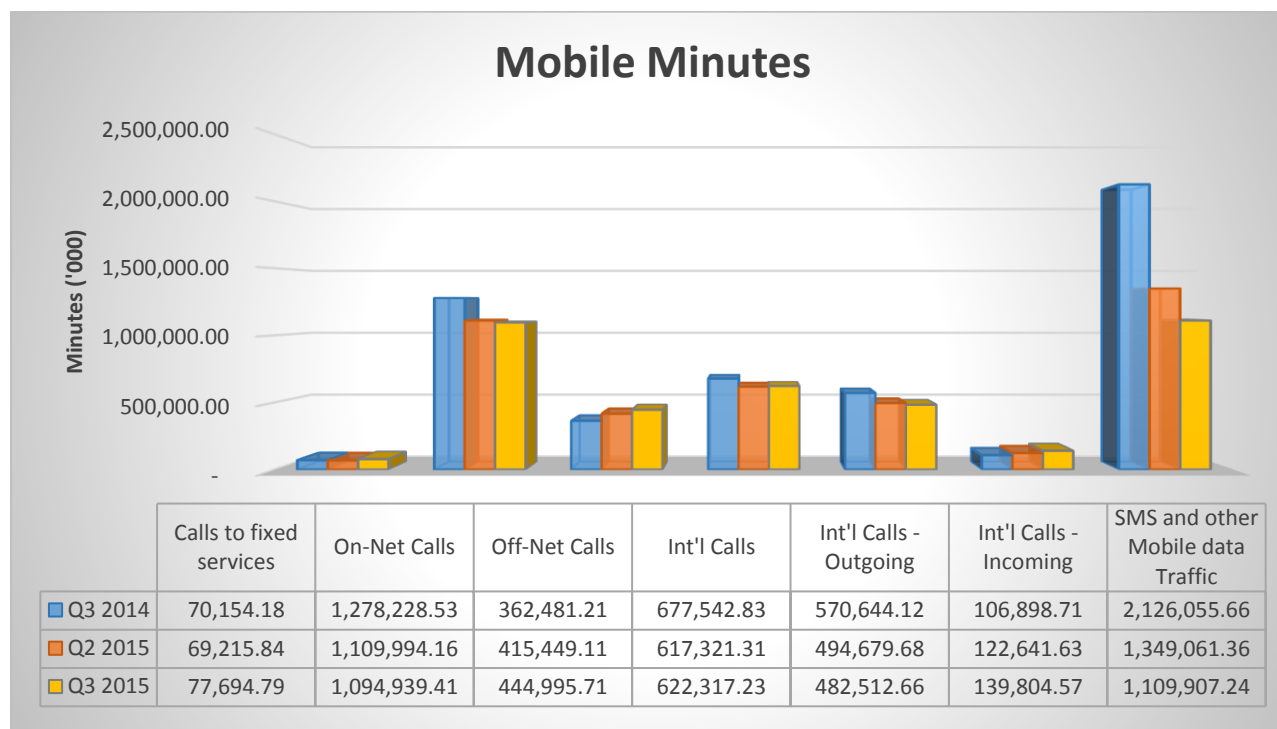
% Change: Q3 '15/ Q2 '15

Total Subscriptions: 2.31%

Postpaid: 1.52%

Prepaid: 2.36%

Figure 6: Mobile Minutes



% Change: Q3 '15/ Q2 '15

Calls to fixed services: 12.25%

On-Net Calls: -1.36%

Off-Net Calls: 7.11%

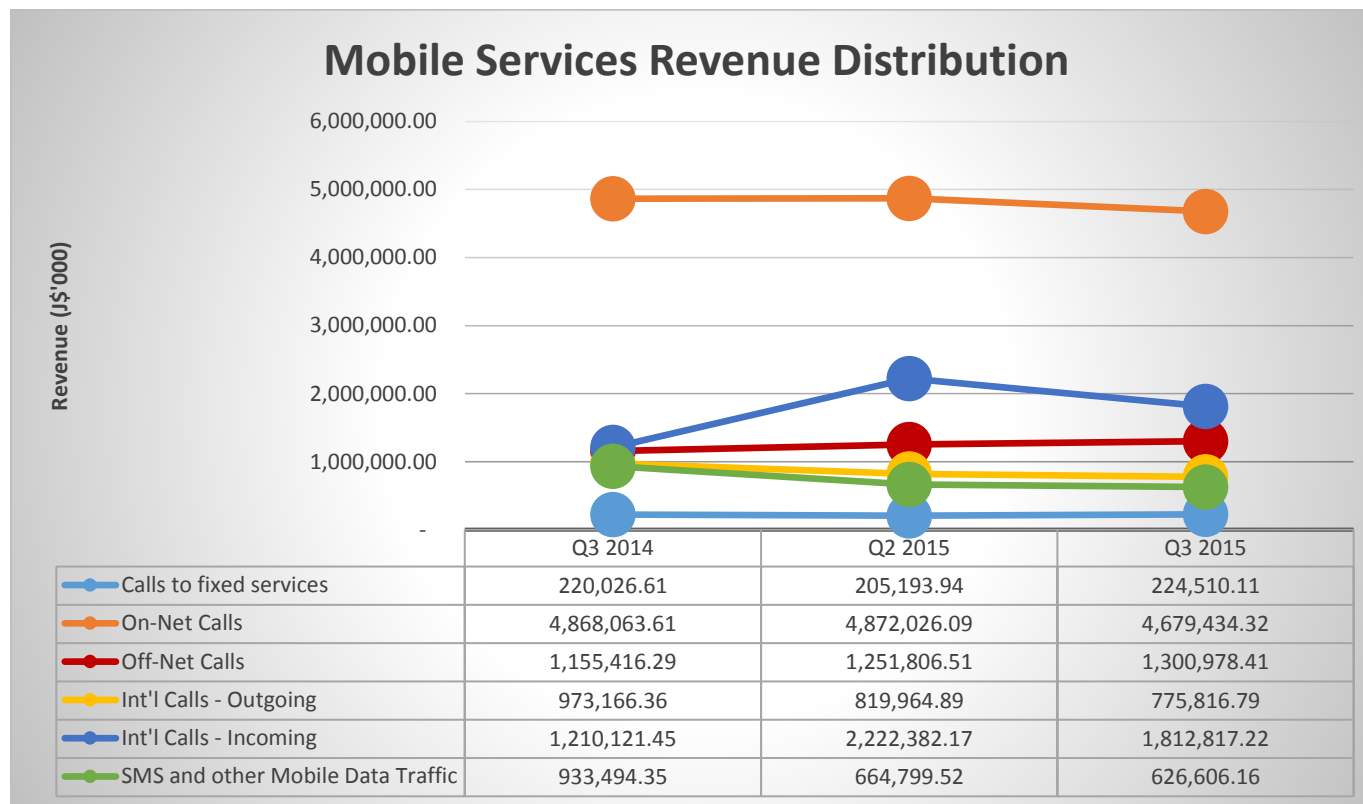
Int'l Calls: 0.81%

Int'l Calls – Outgoing: -2.46%

Int'l Calls – Incoming: 13.99%

SMS & other Mobile Data Traffic: -17.73%

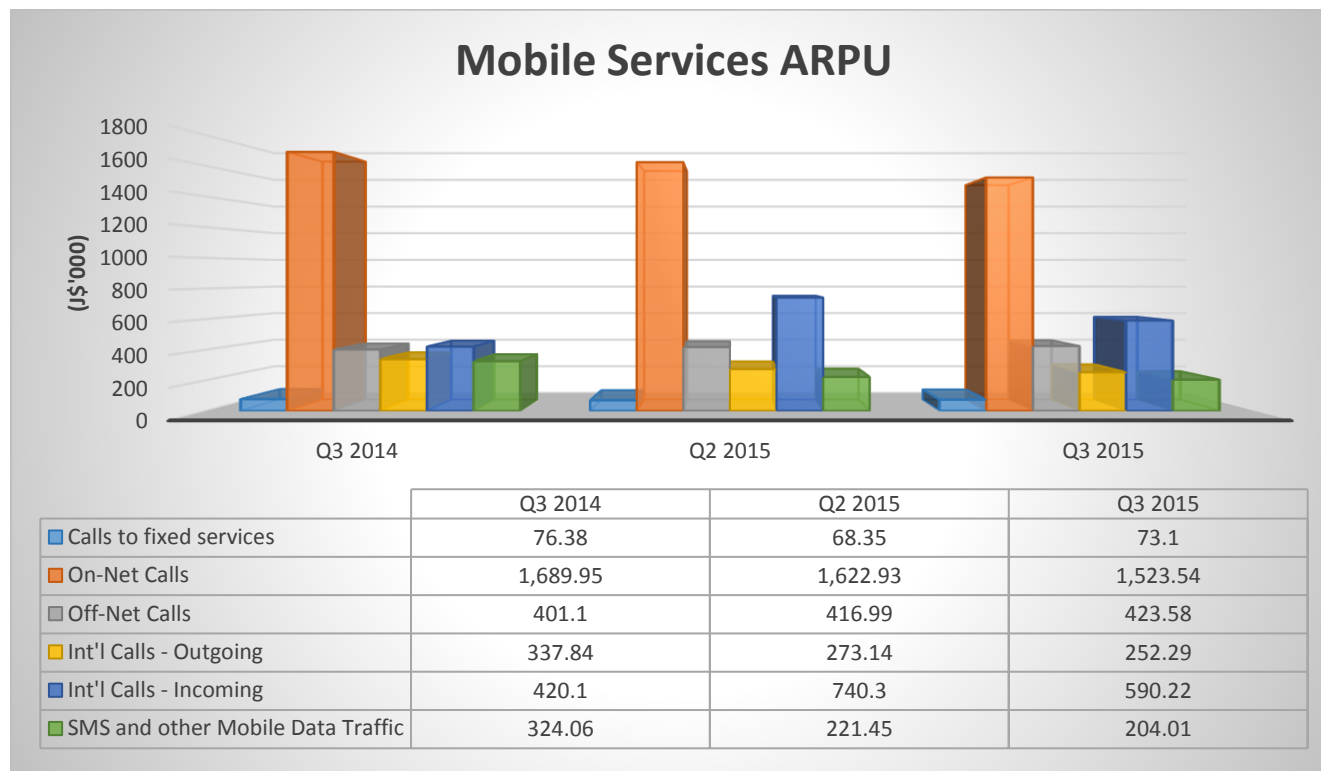
Figure 7: Mobile Services Revenue Distribution



% Change: Q3 '15/ Q2 '15

- Calls to Fixed services: 9.41%
- On-Net Calls: -3.95%
- Off-Net Calls: 3.95%
- Int'l Calls – Outgoing: -5.38%
- Int'l Calls – Incoming: -18.43%
- SMS & other Mobile Data Traffic: -5.75%

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

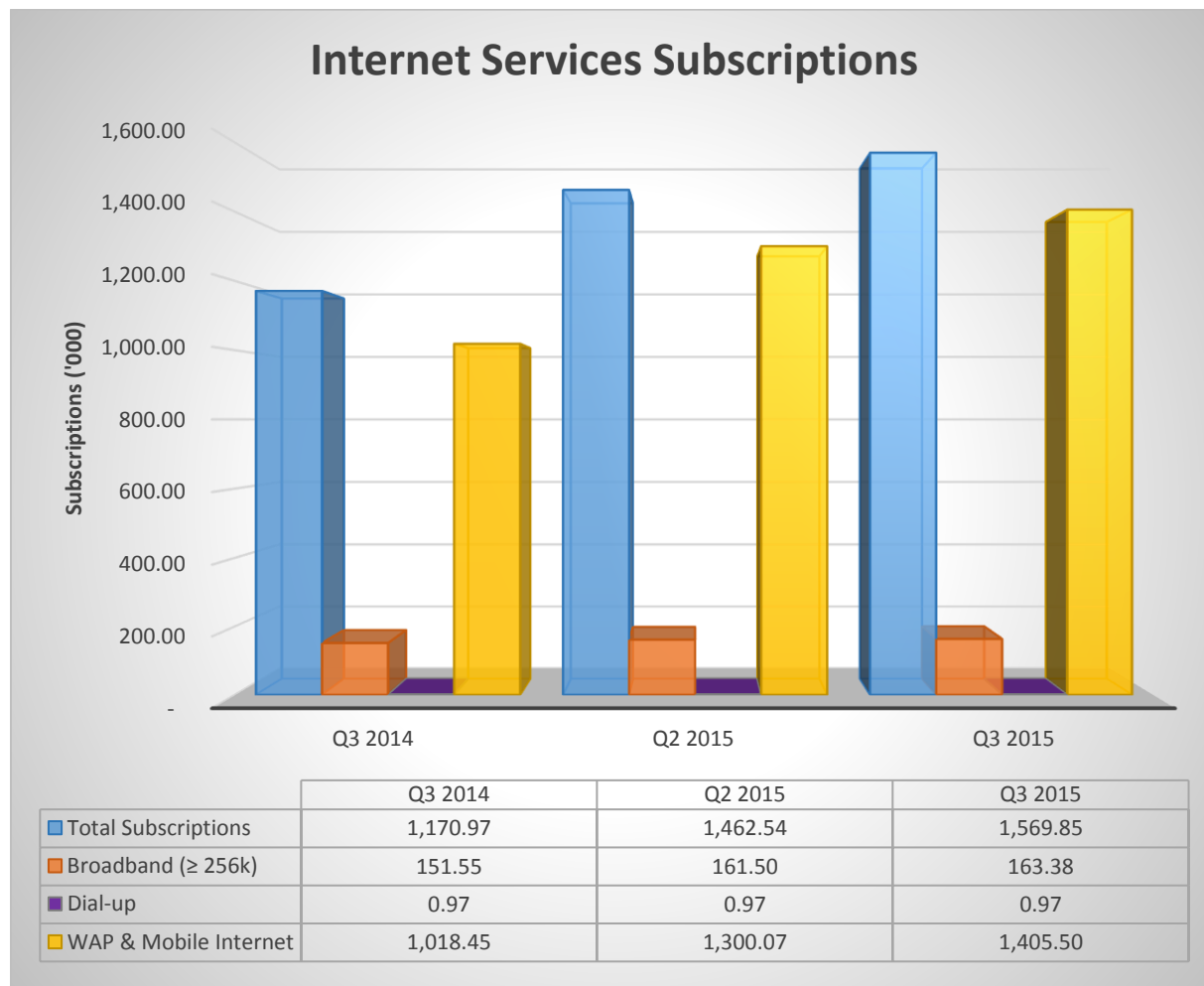


% Change Q3 '15/ Q2 '15

- Calls to fixed service: 6.95%
- On-Net Calls: -6.12%
- Off-Net Calls: 1.58%
- Int'l Calls – Outgoing: -7.63%
- Int'l Calls – Incoming: -20.27%
- SMS 7 other Mobile Data Traffic: -7.88%

Internet Market Data

Figure 9: Internet Services Subscriptions



% Change Q3 '15/ Q2 '15

Total Subscriptions: 7.34%

Broadband (≥ 256k): 1.16%

Dial-up: 0%

WAP & Mobile Internet: 8.11%

Industry Penetration and Concentration

Penetration Rate¹

Penetration Rate	Q3 2014	Q2 2015	Q3 2015
Fixed Subscription Penetration Rate	9.31%	9.41%	9.32%
Mobile Subscription Penetration Rate	106%	110%	113%
Fixed Broadband Subscription Penetration Rate	6%	6%	6%
Mobile Broadband Subscription Penetration Rate	37%	48%	52%
Total Broadband Subscription Penetration Rate	43%	54%	58%

Concentration Ratio (Herfindahl-Hirschman Index)²

Herfindahl-Hirschman Index (HHI)	Q3 2014	Q2 2015	Q3 2015
Fixed HHI	8,328	8,237	8,232
Mobile HHI	6,201	5,965	5,871
Fixed Broadband HHI	5,001	5,004	5,001
Mobile Broadband HHI	8,049	7,035	6,864

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

² Calculated using subscription data.

Appendix

Fixed Market	Q3 2014	Q2 2015	Q3 2015	% Change Q3'15/Q2'15	% Change Q3'15/Q3 '14
Total Subscriptions ('000)	253.60	256.27	253.69	-1.01	0.04
Fixed to Fixed ('000 minutes)	125,747.97	114,220.22	113,265.61	-0.84	-9.93
Fixed to Mobile Calls ('000 minutes)	126,913.25	145,214.13	148,222.80	2.07	16.79
Total International Calls ('000 minutes)	79,183.53	70,755.12	72,312.55	2.20	-8.68
Outgoing International Calls ('000 minutes)	17,884.53	17,206.13	18,957.75	10.18	6.00
Incoming International Calls ('000 minutes)	61,299.00	53,549.00	53,354.80	-0.36	-12.96
Total Revenue (J\$' million)	2,215.97	2,477.18	2,568.08	3.67	15.89

Mobile Market	Q3 2014	Q2 2015	Q3 2015	% Change Q3'15/Q2'15	% Change Q3'15/Q3 '14
Total Subscriptions ('000)	2,880.59	3,001.99	3,071.41	2.31	6.63
On-Net Calls ('000 minutes)	1,278,228.53	1,109,994.16	1,094,939.41	-1.36	-14.34
Off-Net Calls ('000 minutes)	362,481.21	415,449.11	444,995.71	7.11	22.76
International calls	677,542.83	617,321.31	622,317.22	0.81	-8.15
Outgoing International ('000 minutes)	570,644.12	494,679.68	482,512.66	-2.46	-15.44
Incoming International ('000 minutes)	106,898.71	122,641.63	139,804.57	13.99	30.78
SMS and other mobile data traffic	2,126,055.66	1,349,061.36	1,109,907.24	-17.73	-47.80
Total Revenue (J\$ ' million)	12,205.59	13,357.02	13,002.67	-2.65	6.53

Internet Market	Q3 2014	Q2 2015	Q3 2015	% Change Q3'15/Q2'15	% Change Q3'15/Q3 '14
Total Subscriptions ('000)	1,079.94	1,462.54	1,569.84	7.34	34.06
Broadband (≥256K)	151.55	161.50	163.38	1.16	7.81
Dial-up	0.97	0.97	0.97	0.00	0.00
WAP & Mobile Internet	927.42	1,300.07	1,405.50	8.11	38.00
Total Revenue (J\$' million)	2,981	4,245.44	4,544.54	7.05	52.45

Penetration Rate	Q3 2014	Q2 2015	Q3 2015
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