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Telecommunications Statistics

and

Market Report 2022

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Telecoms Statistics & Market Report 2022

Guernsey & Jersey 2022

Introduction

This report is compiled by Statistics Jersey on behalf of the Guernsey Competition & Regulatory Authority (GCRA) and the Jersey Competition Regulatory Authority (JCRA). It presents statistics on the telecommunications sectors in the Bailiwicks of Guernsey[1] and Jersey. It covers the calendar year 2022 and is based primarily on data submitted by the licensed telecommunications operators during the first half of 2023. All currency numbers in this report are presented in nominal terms and have not been adjusted to account for inflation unless stated otherwise.

Further background information on the report is provided in the Notes section.

Statistics Jersey, GCRA and JCRA would like to thank all operators for their contributions to this report.

Summary

- Average monthly **consumer spending** on telecommunications services increased by 0.3% in 2022 to £79.08 in Guernsey, and decreased by 0.3% to £77.32 in Jersey
- Around two-fifths of subscriptions in the Channel Islands were **bundles** (43% in Guernsey and 42% in Jersey)
- Total **turnover** increased in Guernsey by 1.6% to £70.8m in 2022. Total turnover in Jersey decreased by 2.3% to £105.4m
- JT and Sure remain the **largest operators** in their respective home markets of Jersey and Guernsey
- **Employment** within the telecommunication sector increased in Guernsey by 7.2%, with 224 full-time equivalent staff in 2022, however employment in Jersey has reduced by 1.5% since 2021 to 537 full-time equivalent staff
- In 2022, both Islands showed a decline in the number of **fixed call network minutes** (Guernsey by 20.1% and Jersey by 18.0%), continuing the decreasing trend since 2020
- **Broadband penetration rates** in both Islands were higher than the OECD average (34.7) and similar to the UK (41.3): Guernsey had 41.3 subscriptions per 100 inhabitants and Jersey 40.9
- **Data usage** in both Islands remains below the UK average (482 Gbytes per month): Guernsey subscribers used on average 316 Gbytes per month (up 5.6% on 2021); in Jersey this figure is 353 Gbytes per month (up 1.2% on 2021)
- Meanwhile, **text volumes** have continued to fall slightly in both Islands, decreasing by 4.7% in Guernsey and by 3.4% in Jersey
- The total **number of mobile call minutes** decreased by 12.2% in Guernsey in 2022 and 8.8% in Jersey
- **Mobile data volumes** increased by 9.6% in Guernsey and 11.0% in Jersey
- Total **mobile revenue** has increased in both Islands since 2021: 9.0% in Guernsey and 3.7% in Jersey

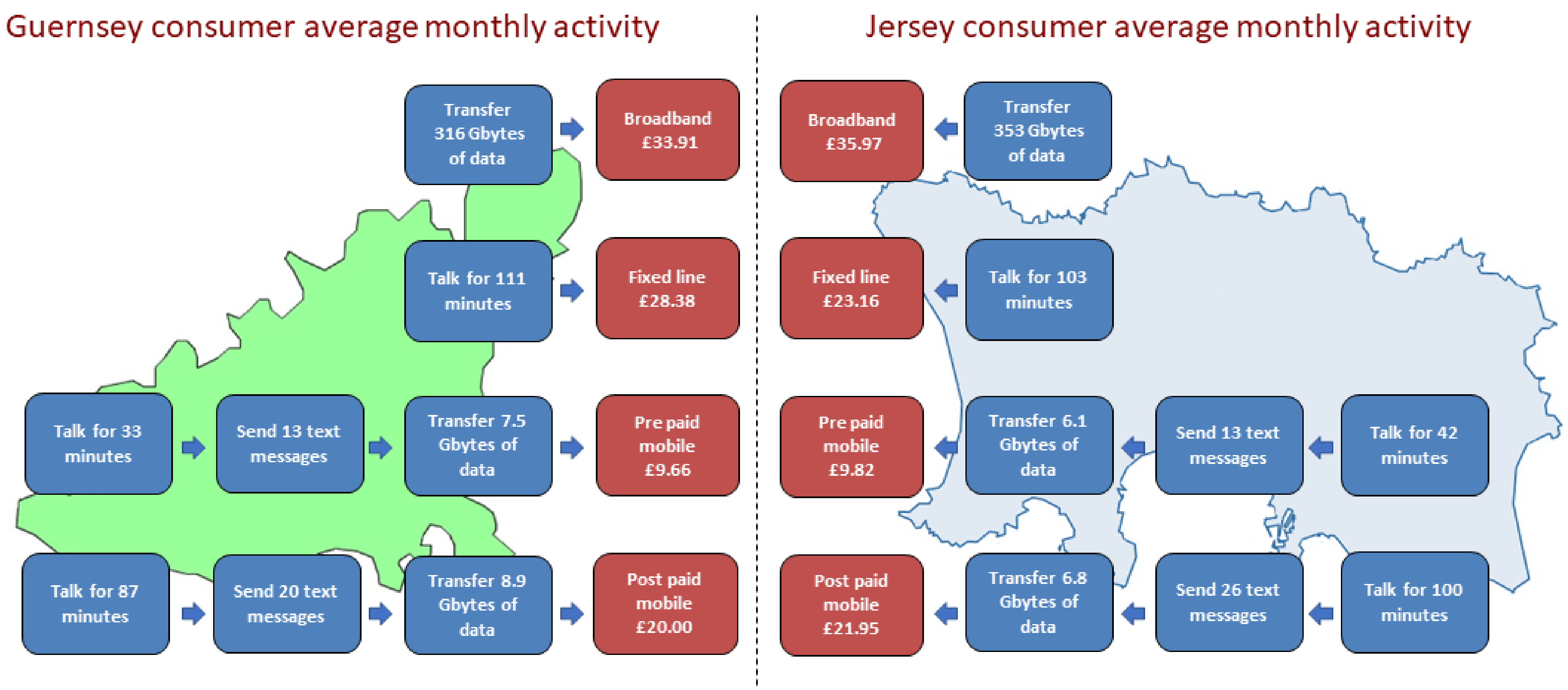
[1] For the purposes of this report Guernsey includes the Bailiwick islands of Guernsey, Herm, Alderney and Sark.

Statistics Jersey

Contents

Statistics Jersey

Consumer snapshot in 2022

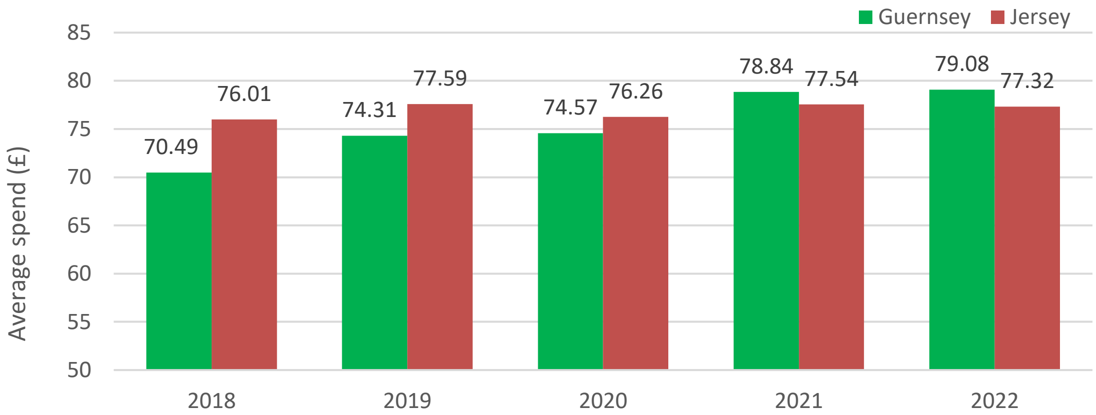


Average monthly consumer spend on telecoms services

Average monthly spend by consumers on telecoms services in the Channel Islands was £78.15 in 2022; down from £78.20 in 2021. This includes expenditure on broadband, fixed line and mobile services[2].

As shown in Figure 1, average monthly spend in Guernsey increased by 0.3% to £79.08 in 2022 compared to 2021, while average monthly spend decreased by 0.3% in Jersey to £77.32.

Figure 1 – Average consumer spend on telecoms services in the Channel Islands, 2018 to 2022



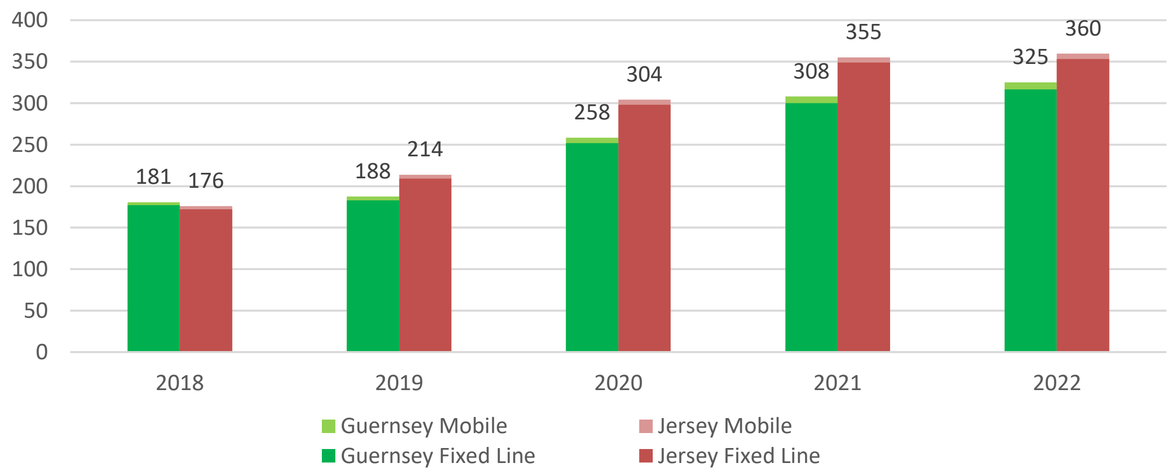
Note: the methodology to calculate average consumer spend was updated in 2022 – the data in Figure 1 will not be consistent with previous reports

Consumer data usage

Average monthly data usage by consumers in the Channel Islands was 346 Gbytes in 2022; up from 330 Gbytes in 2021.

As shown in Figure 2, average data usage increased in Guernsey by 5.6% to 325 Gbytes in 2022 compared to 2021. This was made up of 9 Gbytes of mobile data and 316 Gbytes of fixed line broadband data. In Jersey, average data usage increased by 1.3% to 360 Gbytes; this was made up of 7 Gbytes of mobile data and 355 Gbytes of fixed line broadband data.

Figure 2 – Average data usage in the Channel Islands, 2018 - 2022

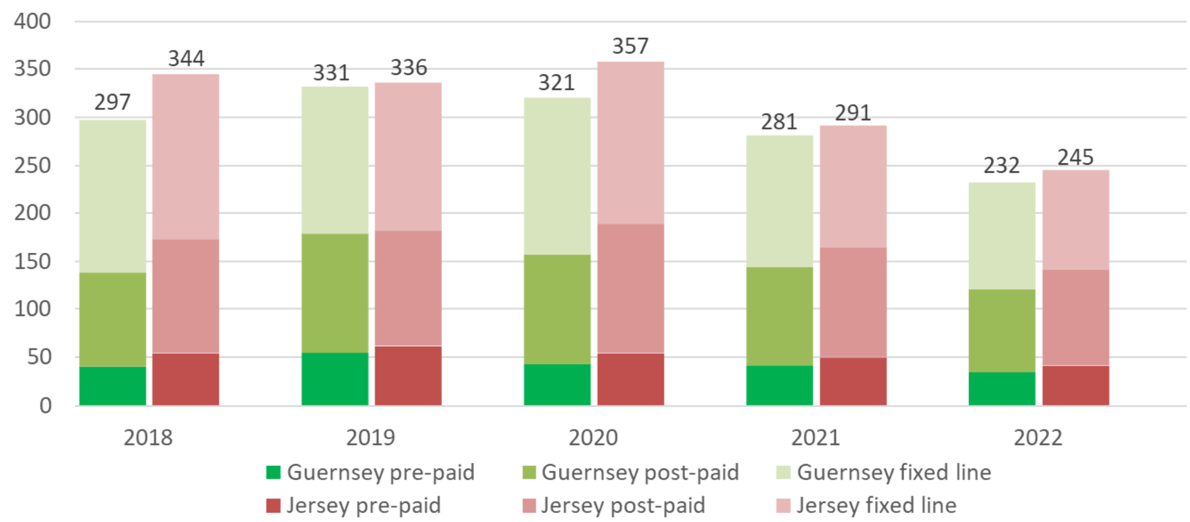


[2] The methodology for average monthly spend assumes each customer has one broadband, fixed line and mobile subscription. This method sums the average monthly spend on broadband and fixed line, and the weighted average spend on pre- and post-paid mobile.

Consumer voice and message use

In 2022, Jersey consumers made on average 103 fixed line minutes, 42 pre-paid and 100 post-paid mobile call minutes per month; this represented a decrease of 15.8% on 2021. The equivalent figures for Guernsey were 111 fixed line minutes, 33 pre-paid and 87 post-paid mobile call minutes; this was a decrease of 17.4% on 2021.

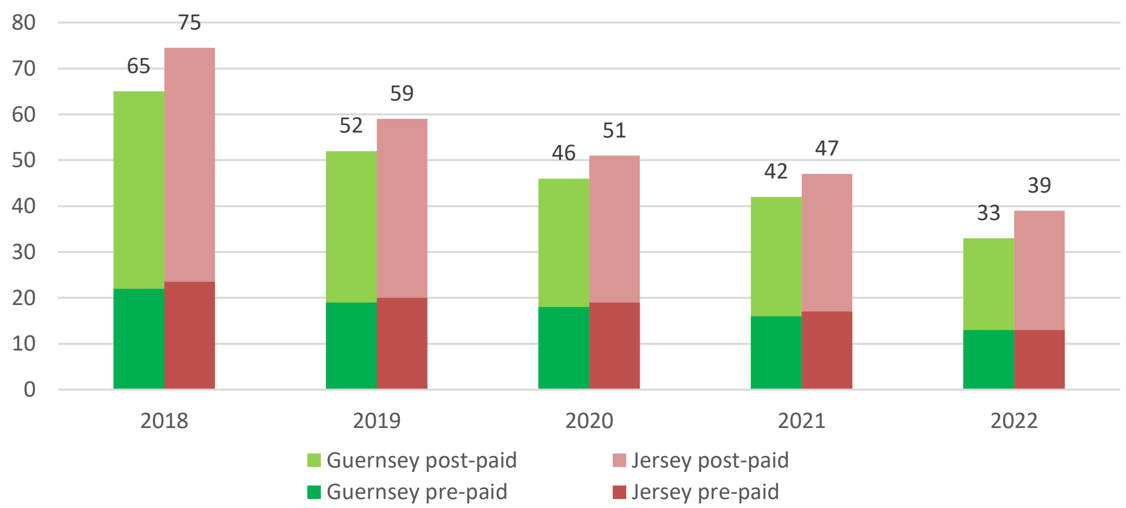
Figure 3 – Average monthly pre- and post-paid call minutes made in the Channel Islands, 2018 – 2022



In 2022, Jersey consumers sent on average 13 pre-paid and 26 post-paid SMS messages per month; this represented a decrease of 16.6% on 2021. The equivalent figures for Guernsey in 2022 were 13 pre-paid and 20 post-paid messages; this was a decrease of 20.1% on 2021.

As Figure 4 shows, the average number of pre-paid and post-paid messages sent per subscriber in both Islands has been decreasing since 2018.

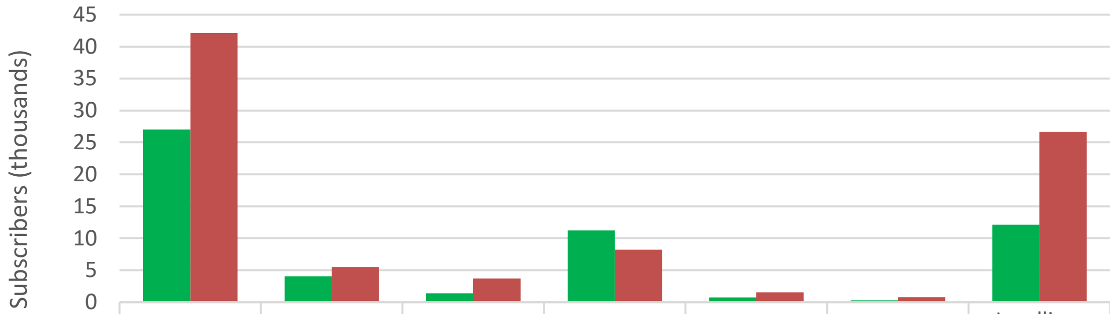
Figure 4 – Average monthly pre- and post-paid SMS messages in the Channel Islands, 2018 - 2022



Subscriptions

Figure 5 shows the number of subscriptions by package type in Jersey and Guernsey.

Figure 5 – Subscriptions by package type in the Channel Islands, 2022



	Mobile only	Landline only	Broadband only	Landline & broadband	Landline & mobile	Broadband & mobile	Landline, broadband & mobile
Guernsey	27,025	4,073	1,406	11,228	750	311	12,138
Jersey	42,126	5,485	3,695	8,191	1,557	790	26,658

In the Channel Islands, around two-fifths of subscriptions were bundles. In Jersey, 42.0% of subscriptions were part of a combined package; the equivalent figure in Guernsey was 42.9%.

Figures 6 and 7 show the proportions of each package type in each Island.

Figure 6 – Subscriptions by package type in Guernsey, 2022

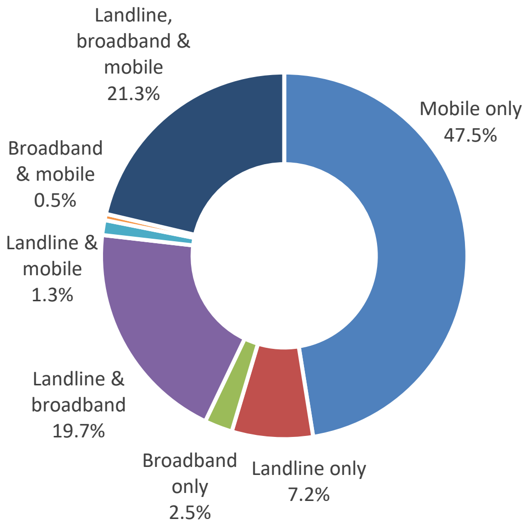
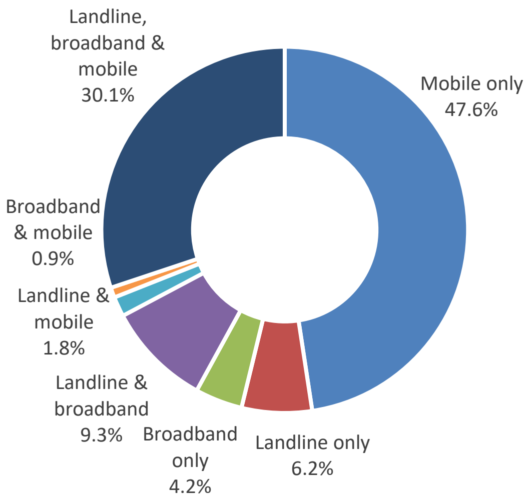


Figure 7 – Subscriptions by package type in Jersey, 2022



Nearly half of subscriptions in both Islands were mobile only subscriptions.

The bundle type with the largest number of subscribers in both Islands was packages containing landline, broadband and mobile: in Guernsey 21.3% of subscriptions were for bundle types containing all three products. In Jersey 30.1% of subscriptions were for this package type.

In Guernsey, around one fifth (19.7%) of subscriptions were for a landline & broadband bundle, compared to 9.3% of subscriptions in Jersey.

Statistics Jersey

Economic statistics for the telecommunications sector

£71 million

Total revenues from Guernsey-based customers

£105 million

Total revenues from Jersey-based customers

£7.5 million

Contribution to Guernsey tax through staff income tax, social security, corporate tax and property rates & TRP

£14.9 million

Contribution to Jersey tax through staff income tax, social security, corporate tax, GST and property rates

224 staff employed

In Guernsey in the supply of telecommunication services to Guernsey customers as at the end of 2022

537 staff employed

In Jersey in the supply of telecommunications services to Jersey customers as at the end of 2022

£6 million

Capital investment in fixed and mobile networks, IT infrastructure and other telecoms activities

£9 million

Capital investment in fixed and mobile networks, IT infrastructure and other telecoms activities

653

Retail leased lines, primarily used by organisations for voice or data services

729

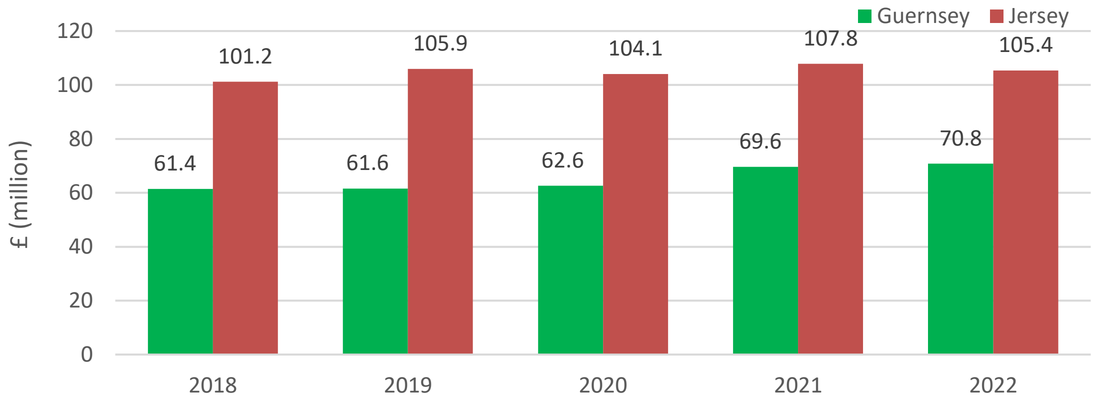
Retail leased lines, primarily used by organisations for voice or data services

Turnover of the telecommunications sector

Total turnover of the telecommunications industry in the Channel Islands (including fixed, mobile, Internet, the sale of handsets and the provision of telecommunications associated with data centre/hosting services) was £176.1m in 2022, down 0.8% from £177.5m in 2021. Turnover includes revenues associated with Channel Island subscribers while on and off the Islands, plus revenue from visitors to the Islands in 2022.

As shown in Figure 8, total turnover in Guernsey increased by 1.6% to £70.8m in 2022 compared to 2021. In Jersey, total turnover decreased by 2.3% to £105.4m.

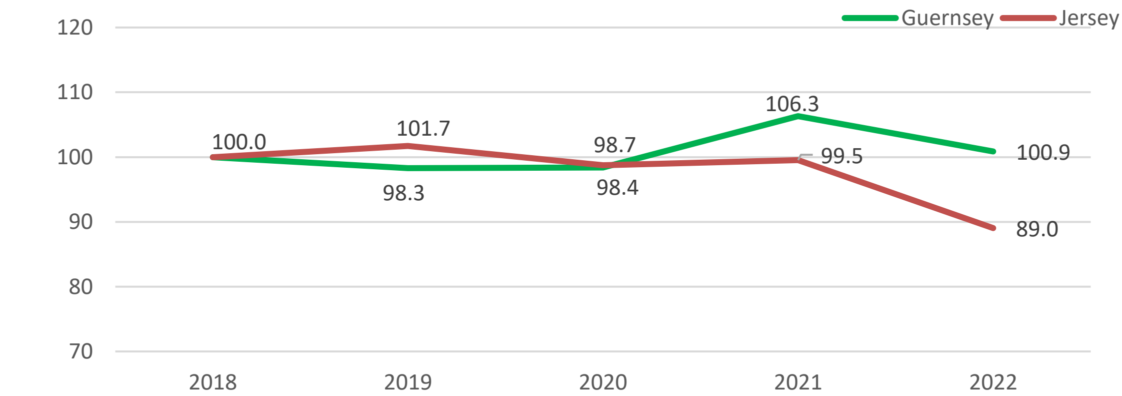
Figure 8 – Total turnover of the telecommunications industry in the Channel Islands, 2018 to 2022



Note: 2020 figures have had adjustments since the 2020 report based on updated information

Figure 9 shows the trend of turnover in real terms over time (adjusting for inflation), with the index set to 100.0 in 2018.

Figure 9 – Index of total real-terms turnover in the Channel Islands, 2018 to 2022[3]



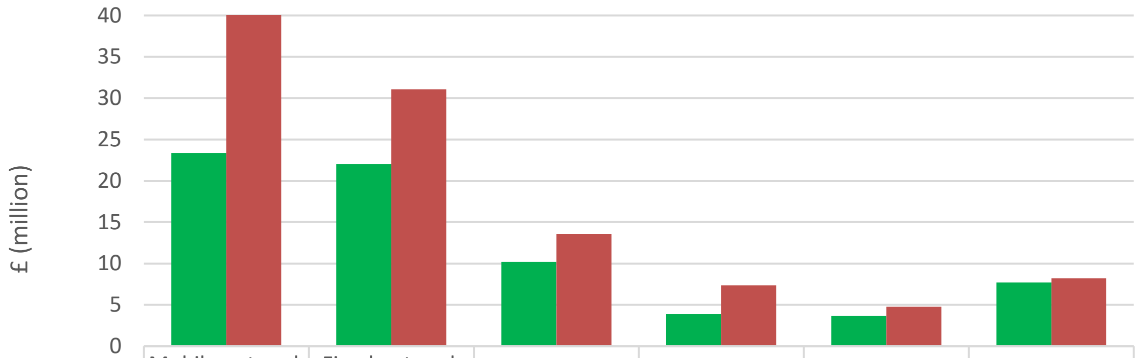
While in monetary terms, total turnover in Jersey has increased since 2018; in real terms, turnover has decreased following a sharp downturn in 2022. In Guernsey, real terms turnover has fluctuated over the years, however still represents a slight increase since 2018[4].

[3] Calculated using the Jersey and Guernsey RPI

[4] The large gap between Jersey and Guernsey in 2022 is partly due to the difference in inflation in the two islands. In Guernsey, RPI in December 2022 was 8.5% compared to 12.7% in Jersey.

Figure 10 below shows the total turnover segmented into the different types of telecommunications activity in 2022. The fixed and mobile figures include revenues from both voice and data services, and for both retail and corporate customers.

Figure 10 – Total turnover by type of telecommunication activity, 2022



	Mobile network retail	Fixed network retail	Leased lines	Wholesale	Data centre	Other
Guernsey	£23,362,981	£21,999,841	£10,202,241	£3,881,095	£3,636,940	£7,690,914
Jersey	£40,359,670	£31,077,022	£13,563,086	£7,358,550	£4,779,766	£8,223,971

N.b. The turnover figures within the chart above should be considered as the total turnover amounts for each activity. Definitions for revenue within each individual section of the report differ from the above.
Wholesale is defined as those products sold on to other retailers for resale.

In Guernsey, the highest turnover was generated from mobile network retail which accounted for 33.0% of the total turnover. Mobile network retail also generated the highest turnover in Jersey, representing 38.3% of the total.

Figures 11 and 12 below summarise total turnover by key service categories, with "fixed" combining fixed network retail, leased lines, wholesale and data centres.

Figure 11 – Total turnover by key service category, Guernsey 2022

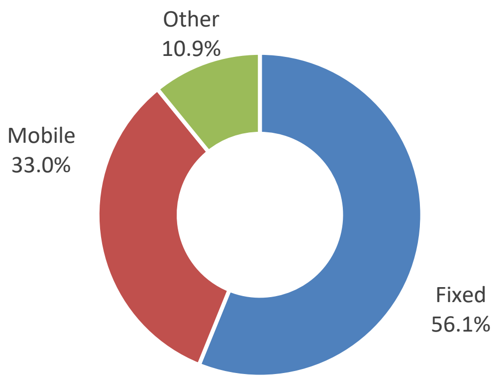
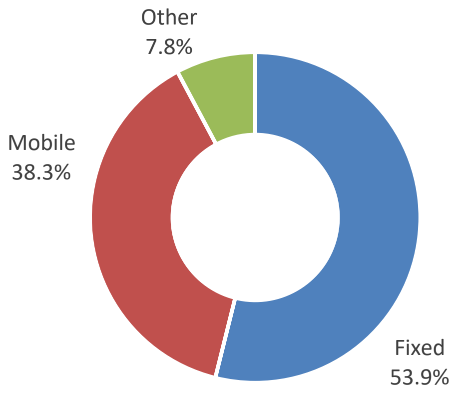


Figure 12 – Total turnover by key service category, Jersey 2022



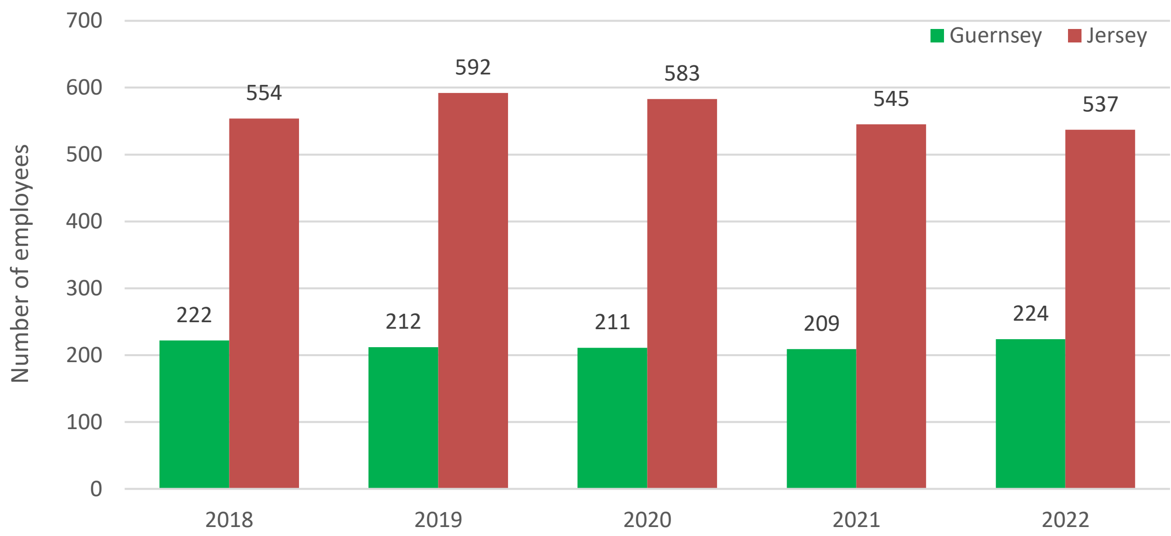
The biggest share of revenue in Guernsey and Jersey was generated in the fixed sector. In 2022 in Guernsey, it accounted for 56% of total turnover, whilst in Jersey it accounted for 54%. Both Islands have experienced a decrease in revenues in the fixed sector since 2021 (2.1% in Guernsey[5] and 4.4% in Jersey). Meanwhile, mobile sector revenues increased in both Islands (by 8.6% in Guernsey and 5.4% in Jersey).

[5] Note: 2021 figures for Guernsey have had adjustments since the 2021 report based on updated information

Employment in the telecommunications sector

Figure 13 shows the number of full-time equivalent staff employed in the supply of telecommunication services to Guernsey and Jersey customers at the end of each year since 2018. Across the Islands, the sector employed 761 full time equivalent staff at the end of 2022, representing a small increase of 7 staff on 2021 and reversing the downward trend seen since 2019.

Figure 13 – Full-time equivalent employees in the telecommunications sector, 2018 to 2022

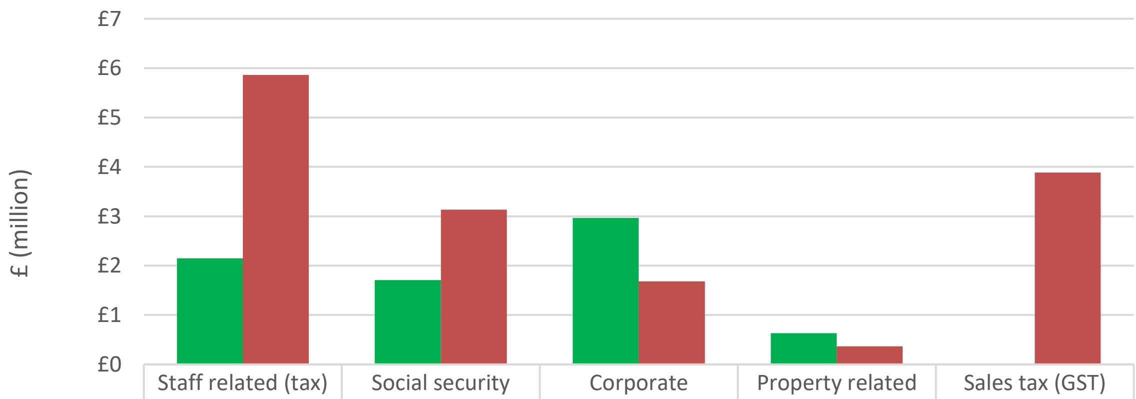


In 2022, there were 2.4 times as many staff employed in the telecommunications sector in Jersey than in Guernsey. Since 2018, the number of employees in the telecommunications sector in Jersey has decreased by 3%, while the number of employees in Guernsey has increased by 1% despite losing 13 staff between 2018 and 2021.

Taxation contributions

Figure 14 shows that the telecommunications sector contributed £22.4m in taxation in 2022 (£22.0m in 2021); 7.5m in Guernsey (£6.0m in 2021) and £14.9m in Jersey (£16.0m in 2021).

Figure 14 – 2022 contributions by type of taxation



	Staff related (tax)	Social security	Corporate	Property related	Sales tax (GST)
Guernsey	£2,148,534	£1,707,041	£2,962,585	£635,268	0
Jersey	£5,862,670	£3,137,454	£1,679,418	£368,076	£3,887,139

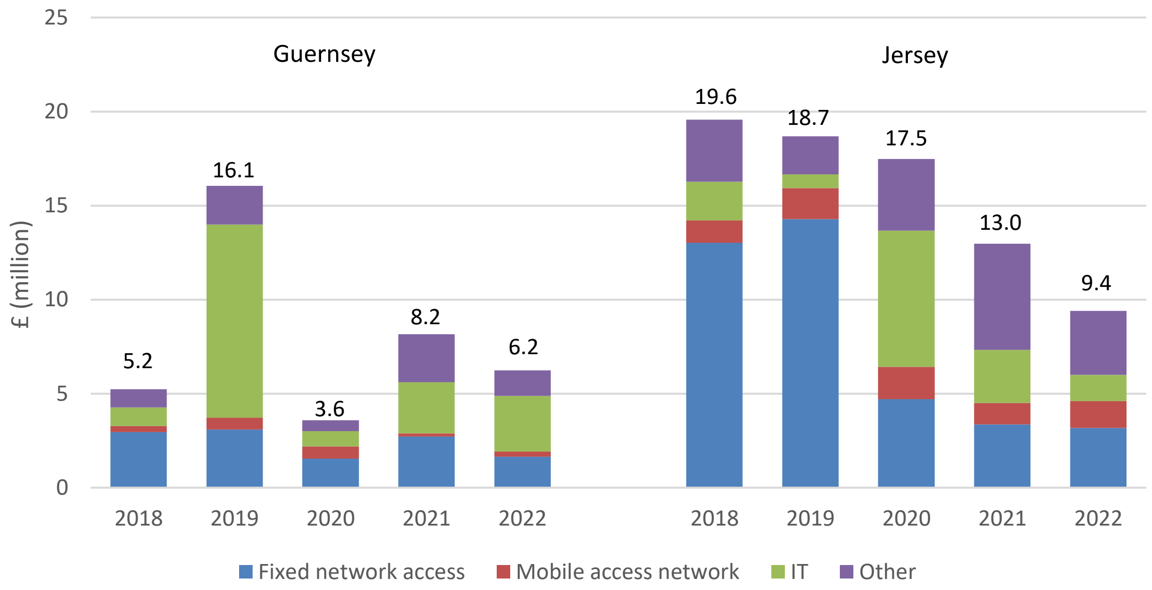
N.b. Social security includes staff and employer contributions paid by the employer. Sales tax is not applicable in Guernsey.

Capital investment

Capital investment in the telecoms sector is often cyclical and linked to network and product lifecycles.

Figure 15 shows the levels of capital investment in telecommunications in Guernsey and Jersey in the years 2018 to 2022.

Figure 15 – Capital investment in the telecommunications industry in the Channel Islands, 2018 to 2022



Capital investment expenditure has varied significantly in Guernsey over the years. It decreased to £6.2m in 2022 from £8.2m the previous year. Jersey has seen an ongoing decline in investment, reducing by 28% to £9.4m in 2022.

Fixed network market

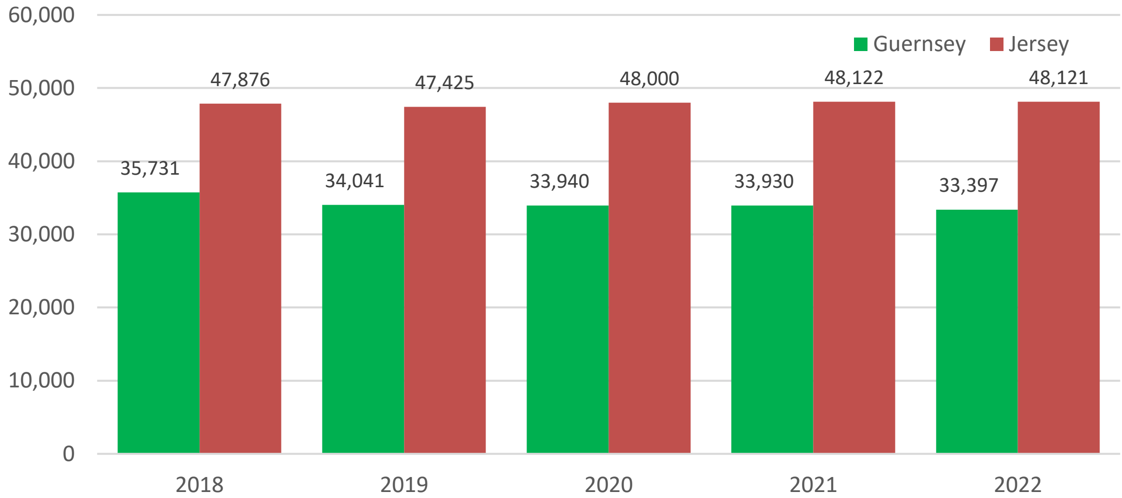
The fixed network market is characterised by consumer equipment that is in a fixed geographic location and used to make/receive voice calls, send/receive faxes and to support broadband and leased line services. In contrast, the consumer equipment in the mobile market is not fixed to a single geographic location and moves easily from place to place. Various technologies are used in fixed networks including traditional copper circuits, fibre optics and wireless links. This section contains information on fixed line telephony, network broadband and network leased line services.

Fixed line telephony market

Total number of lines and subscriptions

Figure 16 shows the number of fixed lines in the Islands during the period 2018 to 2022. In 2022, the number of fixed lines and subscriptions remained effectively the same in Jersey (48,121), while in Guernsey they decreased by 1.6% (33,397).

Figure 16 – Number of retail fixed lines and subscriptions in the Channel Islands, 2018 to 2022



Note - 2020 figures have had adjustments since the 2020 report based on updated information provided.

In Jersey, 99.5% of retail subscriptions were for consumer products[6], while in Guernsey the proportion was 97.2%, with the remaining 2.8% business/enterprise products.

In addition to fixed line connections, Homenet has a fixed wireless network (WiMax), and a number of operators retail data-only sim cards, which can be used in place of a fixed connection for broadband internet access. This type of internet access is considered in the Mobile market section of this report.

Alternative carrier services

Carrier select style services have been available in the Channel Islands for a number of years and, in 2015, Wholesale Line Rental (WLR) services also became available. Table 1 shows the number of subscriptions to such services at the end of 2022. Subscription to the WLR and carrier select services have increased in both Islands compared to 2021[7].

Table 1 – Subscriptions to alternative carriers

	Guernsey	Jersey
Carrier select	9,265	276
Wholesale Line Rental	5,011	11,134
Total	**14,276**	**11,410**

Source: Industry questionnaires

[6] In Jersey, all standard landlines offered by the main three operators (JT, Sure and Airtel) are classified as consumer products

[7] 2021 figures have had adjustments since the 2021 report based on updated information

Fixed telephony minutes

Figures 17 and 18 show the numbers of minutes carried by operators in Guernsey and Jersey annually between 2018 and 2022. For 2022, both Guernsey and Jersey show a decrease in the number of fixed network call minutes originating in the Islands. These are both in line with the trend of decreasing fixed line usage prior to 2020. 2020 showed a small spike in the number of fixed line calls in Guernsey, Jersey and the UK[8] (possibly an effect of COVID-19 lockdown). Compared to 2021, fixed line call minutes decreased in Guernsey by 20.1% to 44.7 million and in Jersey by 18.0% to 59.7 million.

Figure 17 – Number of fixed line minutes in Guernsey by operator, 2018 to 2022

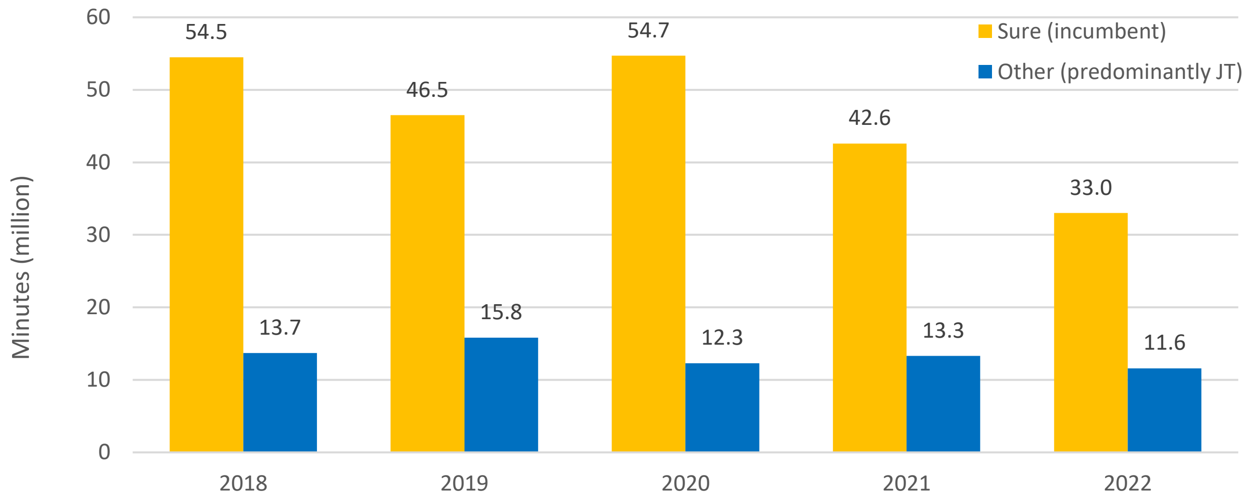
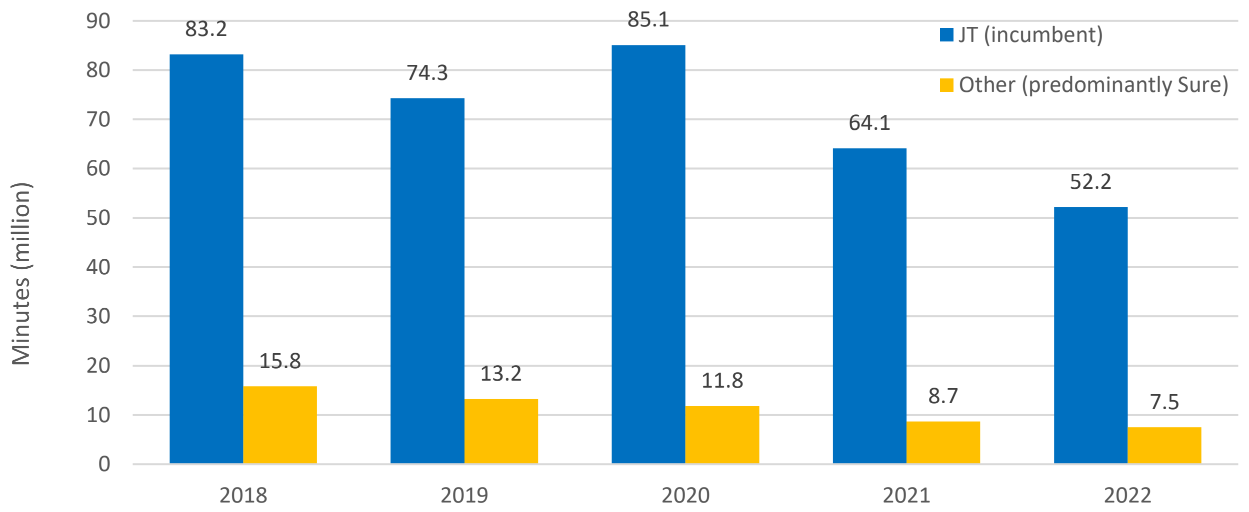


Figure 18 – Number of fixed line minutes in Jersey by operator, 2018 to 2022



[8] Ofcom Communications Market Report 2021

Fixed network penetration rates

Table 2 shows the number of fixed network connections (wireline and wireless combined) per 100 inhabitants in Guernsey and Jersey.

Penetration rates in Guernsey have continued their gradual decline.

*Penetration rates are unable to be provided for Jersey prior to 2020. Rates will be provided in future years following publication of revised population estimates.

Table 2 – Fixed and wireless retail line connections per 100 inhabitants, 2016 to 2022

	Guernsey	Jersey
2018	57	*
2019	54	*
2020	54	46[9]
2021	53	47
2022	52	47[9]

Revenues

Excluding broadband and leased line services, revenues associated with fixed networks in 2022 were £11.4m in Guernsey (£12.0m in 2021[10]) and £13.4m in Jersey (£14.0m in 2021).

Figures 19 and 20 show these revenue totals broken down into line rental, usage charges and other charges e.g. for customer premises equipment and support services (CPE).

Figure 19 – Fixed network revenues Guernsey

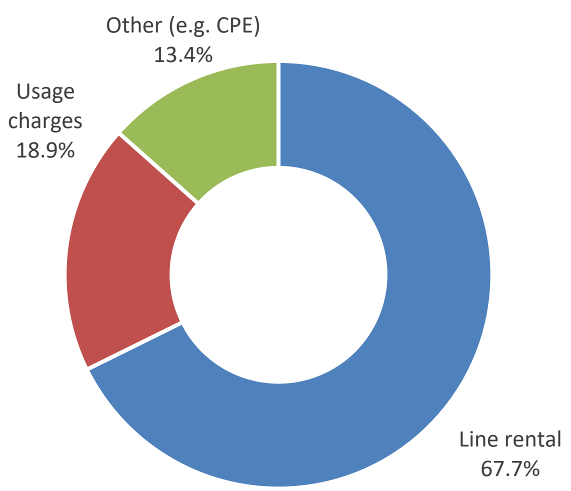
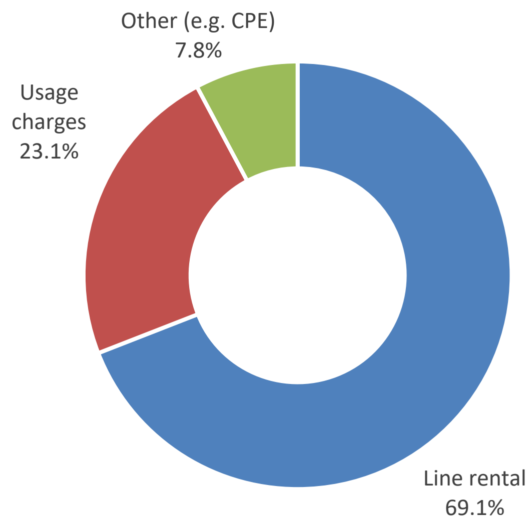


Figure 20 – Fixed network revenues Jersey



N.b. The above charts exclude broadband and leased lines

The average annual revenue per fixed line (wireline and wireless) from line rental, usage charges and associated equipment and services in Guernsey in 2022 was £340.60 (£28.38 per month), showing a decrease of 3.7% compared to 2021.

Excluding GST, the equivalent annual figure for 2022 in Jersey was £277.90 (£23.16 per month), a decrease of 4.4% compared to 2021. Charges for services such as broadband are in addition to these.

[9] Penetration rate calculated using the population estimate from the 2021 Census

[10] 2021 figures have had adjustments since the 2021 report based on updated information

Fixed network broadband market

Fixed network broadband services are those delivered over physical copper connections, fibre connections, fixed wireless communications links (e.g. WiMax) and via satellite. They do not include services delivered over 2G, 3G and 4G mobile networks.

While most broadband subscribers can be categorised as residential users rather than business users, it is difficult to draw a clear distinction as small businesses tend to use services primarily designed for residential use. The proportion of subscribers using business/enterprise products in Jersey is 6.1%, while in Guernsey it is 4.7%.

Subscriptions and penetration rates

Table 3 shows historic levels in both Islands for fixed broadband subscriptions and overall broadband subscriptions (including mobile substitutions). In 2022, the number of fixed line broadband subscriptions increased by 1.9% to 26,338 in Guernsey and increased by 3.6% to 42,193 in Jersey.

Table 3 – Numbers of fixed broadband subscriptions in the Channel Islands, 2018 to 2022

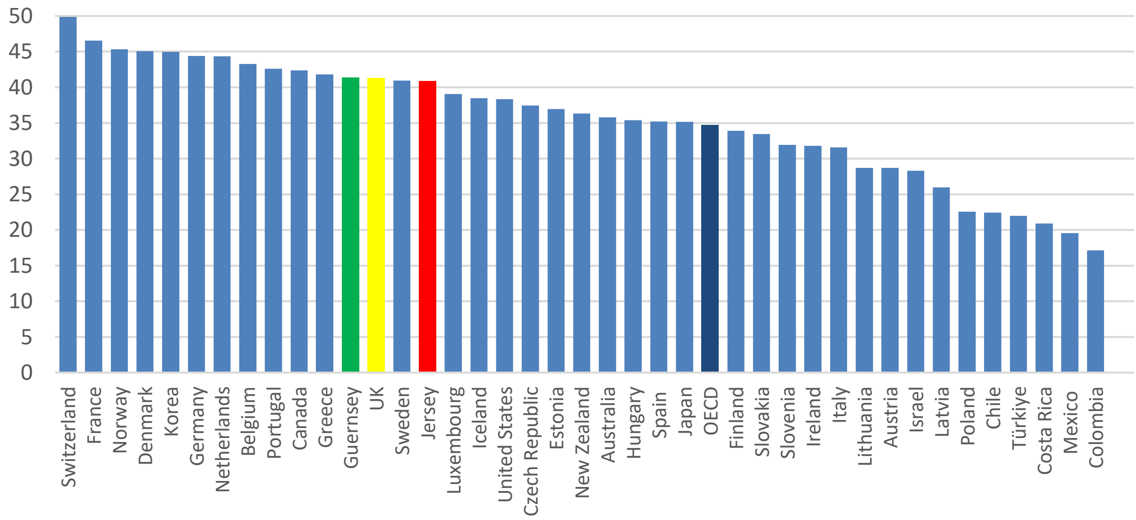
	Guernsey		Jersey	
	Excluding data only mobile broadband	Including data only mobile broadband	Excluding data only mobile broadband	Including data only mobile broadband
2018	24,410	26,763	37,928	43,568
2019	24,873	26,706	38,391	42,910
2020	25,336	27,559	39,699	43,544
2021	25,855	28,482	40,728	45,834
2022	26,338	28,232	42,193	47,401

Since 2018, there has been a gradual upward trend in broadband subscriptions in both Islands.

In Jersey, JT provides some subscriptions with capped data allowance: these make up 17.8% of subscriptions in the Island. In Guernsey, all subscriptions have unlimited data allowance.

As illustrated in Figure 21, the Islands have penetration rates higher than OECD average of 34.7 subscriptions per 100 inhabitants. In 2022, Guernsey had 41.3 subscriptions per 100 inhabitants, equivalent to the UK, while Jersey had 40.9. When data-only mobile access is included, penetration rates are 44.3 for Guernsey and 45.9 for Jersey.

Figure 21 – Jersey, Guernsey & OECD fixed broadband subscriptions per 100 inhabitants



Sources: Statistics Jersey & OECD broadband statistics (https://www.oecd.org/sti/broadband/broadband-statistics/)

Market share by numbers of fixed broadband subscriptions

Figures 22 and 23 show the retail market shares of the fixed network broadband providers in Guernsey and Jersey respectively by numbers of subscriptions. The incumbent operators remained the largest providers in their respective home markets. [11]

Figure 22 – Fixed network broadband market share by number of subscriptions – Guernsey

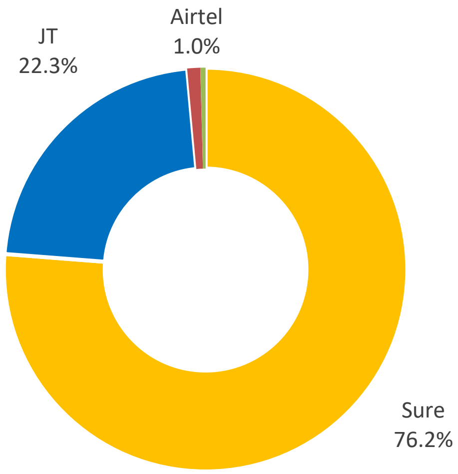


Figure 23 – Fixed network broadband market share by number of subscriptions – Jersey

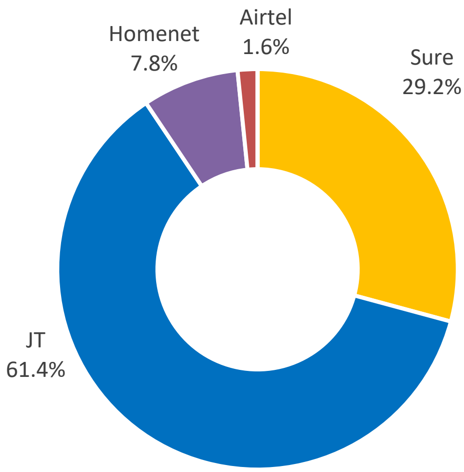


Table 4 shows historic market shares in the fixed broadband market in Guernsey and Jersey between 2018 and 2022.

Table 4 – Fixed broadband market share (%) in Guernsey and Jersey, 2018 to 2022

	Guernsey			Jersey		
	Sure	JT	Other	Sure	JT	Other
2018	82	18	0	32	60	8
2019	80	20	0	32	60	8
2020	79	21	0	32	60	8
2021	79	21	0	31	61	8
2022	76	22	1	29	61	9

In Guernsey, Sure lost 3 percentage points of market share to JT and other operators (Airtel and Starlink).

In Jersey, Sure lost 2 percentage points of market share to other operators (Homenet, Airtel and Starlink).

[11] Starlink entered the Broadband market in both Jersey and Guernsey in 2022. Their market share was too small to be presented in Figure 23.

Broadband download speeds

The technology and download speeds available for broadband internet access differ between the Islands. Guernsey connections are mainly copper based, with subscribers predominantly able to access services via xDSL technologies with advertised lowest download speeds of up to 20Mbps and highest up to 100Mbps. However, fibre connections have begun to be rolled out across the Island. In Jersey, by the end of 2018, the JT network had been converted to fibre and subscribers had access to products with advertised download speeds up to 1Gbps. Homenet also have WiMax and Fibre to the Home (FTTH) networks to service some subscribers, giving speeds of up to 20Mbps and up to 100Mbps. The Advertising Standards Agency has changed its guidelines on the reporting of broadband speeds. This section is written to be in line with the older framework.

In Guernsey, Sure owns the majority of the physical lines and JT and Airtel obtain services through wholesale arrangements. JT also has a small fibre network. Services with download speeds of up to 20Mbps are delivered using ADSL technology, while higher speeds in a range up to 100Mbps are delivered using VDSL technology, fibre is also being rolled out. Starlink also provide a small number of services via satellite[12].

In Jersey, there are a number of separate local access network infrastructures. JT owns the majority of the fibre connections (providing services up to 1Gbps). Other licenced operators gain access to JT's network through wholesale arrangements. Homenet provides services through its WiMax and Fibre to the Home (FTTH) networks providing services up to 20Mbps and 100Mbps, while Starlink also provide a small number of services via satellite.

Figures 24 and 25 show the proportions of fixed network broadband subscriptions by download speed on the historically reported basis of 'up to' speeds in Guernsey and Jersey respectively. Fibre-based services are included in this classification, notwithstanding that fibre connections have different characteristics from those delivered by xDSL over copper.

Figure 24 – Fixed broadband subscriptions by download speed, Guernsey 2022

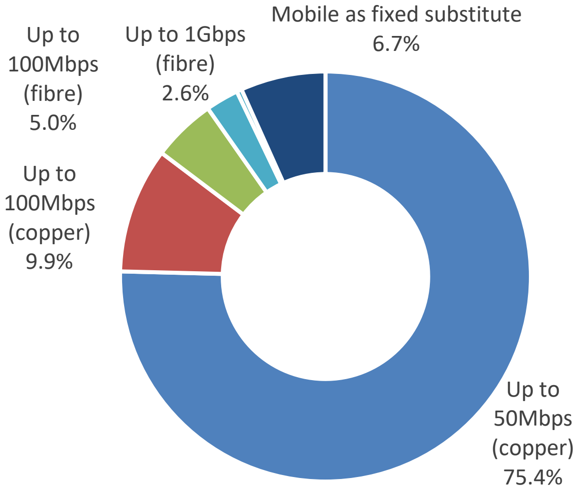
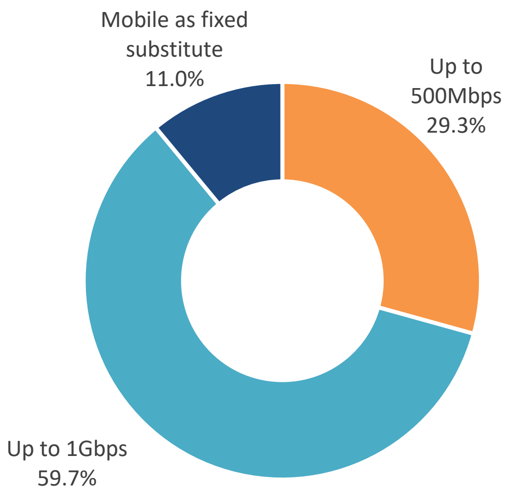


Figure 25 – Fixed broadband subscriptions by download speed, Jersey 2022



The proportion of broadband subscriptions in Jersey with download speeds of up to 500 Mbps and 1 Gbps has remained similar to 2021 at 89.0%.

In Guernsey, 90.3% of subscriptions have download speeds of up to 50 and 100 Mbps. Changes in product classifications mean that direct comparison to prior years is not possible.

[12]The number of satellite subscriptions are too small to be shown in these charts.

Data volumes

Not all service providers were able to provide information on the volumes of data consumed by their customers but, from the information that was provided, it can be estimated that the total volume of data downloaded and uploaded in 2022 by broadband subscribers in Guernsey increased by 7.6% to 100.0 million Gbytes. In Jersey, the volume of data in 2022 increased by 4.8% to 178.7 million Gbytes.

On average, fixed network broadband subscribers (including mobile substitutions) in Guernsey each sent and received an average of 316 Gbytes of data per month in 2022 while subscribers in Jersey each sent and received an average of 353 Gbytes per month. The equivalent figures for 2021 were 300 Gbytes in Guernsey and 349 Gbytes in Jersey, demonstrating a small increase (5.6% and 1.2% respectively). Data usage continues to rise, as has been seen in the UK where data usage per subscriber has risen to 482 Gbytes per month in 2022 (up from 453 Gbytes in 2021).[13]

Not all operators were able to provide a detailed breakdown of data volumes, therefore splits by total data uploaded and downloaded are unable to be reported.

Revenues

Total retail revenues in 2022 from fixed broadband services were £10.7m in Guernsey; up from £10.3m in 2021. Revenues in Jersey in 2022 have increased to £18.2m from £17.6m in 2021.

Fixed network broadband services in Guernsey were, subject to fair usage policies, generally uncapped, meaning that consumers could download and upload as much data as they wish for a fixed monthly subscription. 98.2% of revenues were derived from basic subscriptions and 1.8% from other sources such as usage above the basic subscription, any bolt-ons such as overage and out-of-bundle charges, and equipment sales.

In Jersey, some fixed network broadband services retailed by JT are subject to caps on the amount of data its customers can download, with the allowed amount depending on the monthly subscription; customers can also buy bolt-on packages for extra data allowances and/or pay overage charges. Sure and Homenet sell subscriptions with unlimited usage, subject to fair usage policies. 95.6% of revenues in Jersey were derived from basic subscriptions and 4.4% from other sources.

Average revenue per subscription

Estimated[14] average revenue per fixed network broadband subscription in Guernsey was £406.95 for the year (£33.91 per month). This shows an increase of 2.3% compared to 2021.

The equivalent 2022 figures in Jersey were £431.61 for the year (£35.97 per month), remaining essentially unchanged since 2021.

The above figures exclude revenues from associated line rental.

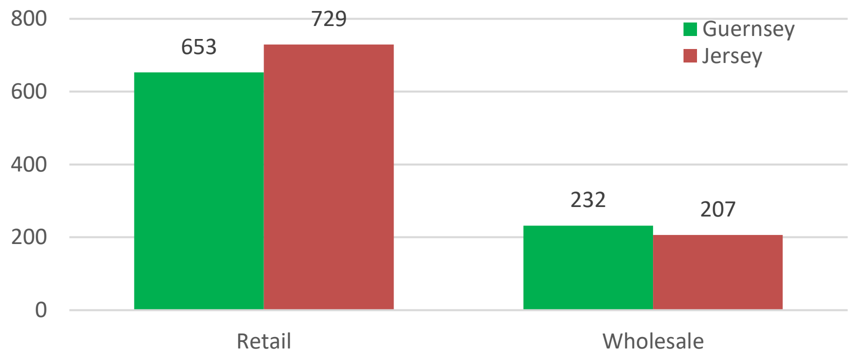
[13] Ofcom report : Connected Nations 2022 Connected Nations 2022: UK report (ofcom.org.uk)

[14] Not all operators were able to separate retail revenues derived from true fixed network broadband activities from those derived from broadband provided by fixed network substitution. It is therefore only possible to estimate the average revenues per fixed broadband subscription. Figures here as elsewhere exclude GST where relevant.

Leased line market

Leased lines (sometimes called private circuits) are private, bi-directional, symmetric telecommunications links between two or more locations. Usually used by corporate and governmental organisations, they can be used for voice or data services. Leased lines are also used by licensed operators to provide mobile network backhaul.

Figure 26 – Number of retail and wholesale leased lines in the Channel Islands, 2022[15]



The number of retail leased lines has increased in both Islands: to 653 from 635 in 2021 in Guernsey, and to 729 from 694 in Jersey. Wholesale leased lines have also increased in Jersey from 202 to 207; while they have decreased in Guernsey from 260 to 232.

Figure 5 shows the number of wholesale and retail leased lines split by on-island, inter-island and off-island lines[16].

Table 5 – Numbers of leased lines by usage, 2022

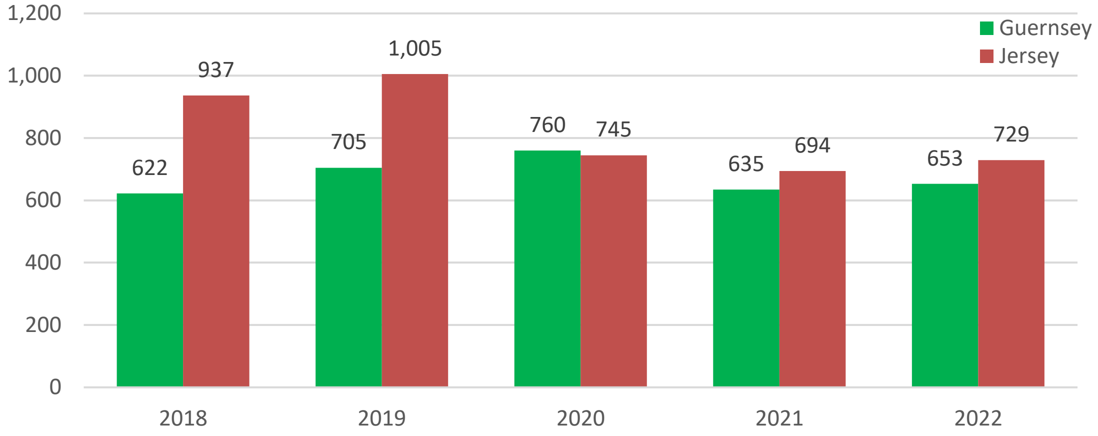
	Guernsey			Jersey		
	On-Island	Inter-Island	Off-Island	On-Island	Inter-Island	Off-Island
Retail	526	30	97	563	26	140
Wholesale	197	1	34	150	1	56

[15] Note that leased line numbers exclude self-provisions.

[16] On-island lines are those where both ends are in the same Island. Inter-island lines are those where one end is in Jersey and the other in Guernsey. Off-island lines are where one end is in the Island and the other end is outside of the Channel Islands.

Figure 27 shows the number of retail leased lines in the Islands during the period 2018 to 2022.

Figure 27 – Number of retail leased lines in the Channel Islands, 2018 to 2022

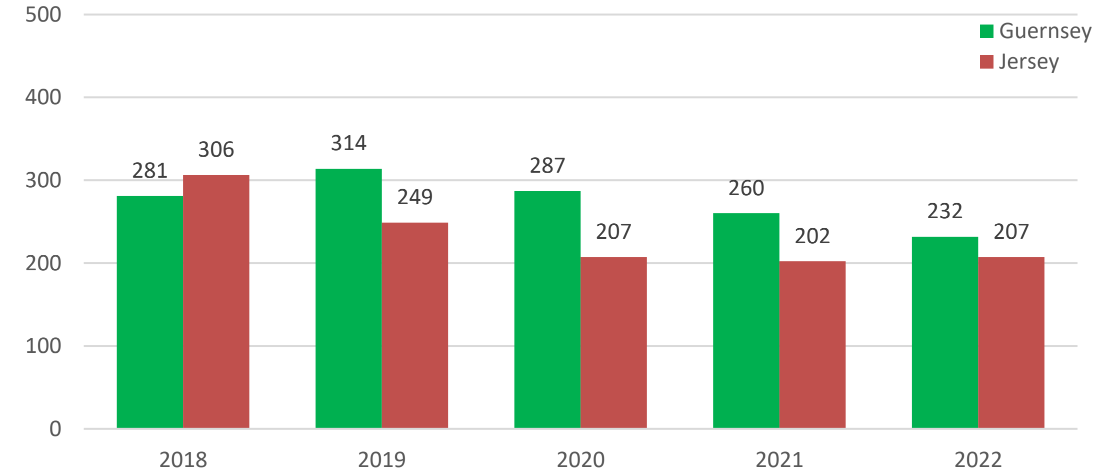


Note: 2020 figures have been adjusted since the 2020 report based on updated information.
The drop in retail leased lines in Jersey after 2019 is likely due to reporting differences.

The number of lines in both Islands increased in 2022.

Figure 28 shows the number of wholesale leased lines in the Islands during the period 2018 to 2022.

Figure 28 – Number of wholesale leased lines in the Channel Islands, 2018 to 2022



In Guernsey, the number of wholesale leased lines has been gradually decreasing since 2019.

Market share by numbers of leased line subscriptions

Figures 29 and 30 show the retail market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions. These include on-island, inter-island and off-island retail leased lines. In 2022, JT was the main retail provider in both Islands.

Figure 29 – Retail leased line market share by number of subscriptions – Guernsey[17]

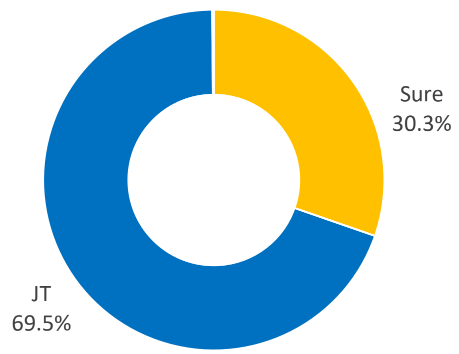
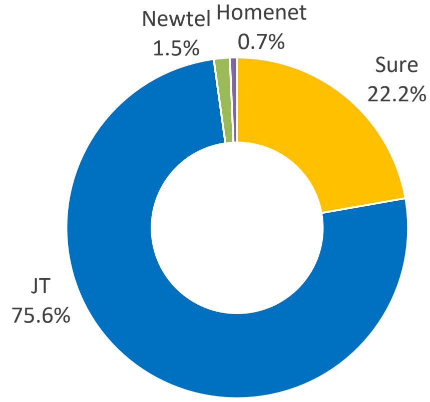


Figure 30 – Retail leased line market share by number of subscriptions – Jersey



Figures 31 and 32 show the wholesale market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions. These include on-island, inter-island and off-island wholesale leased lines. In 2022, Sure was the main wholesale provider in Guernsey, while JT was the main provider in Jersey.

Figure 31 – Wholesale leased line market share by number of subscriptions – Guernsey

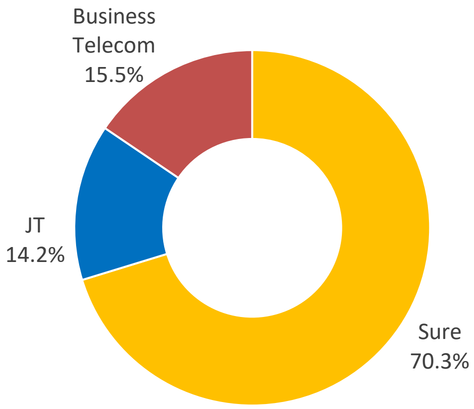
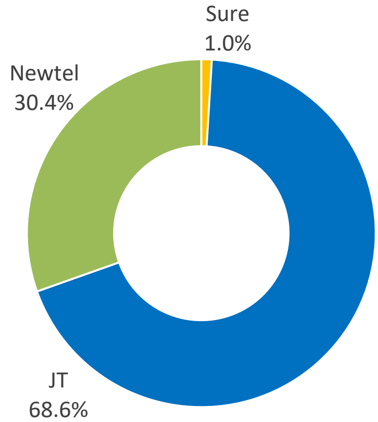


Figure 32 – Wholesale leased line market share by number of subscriptions – Jersey



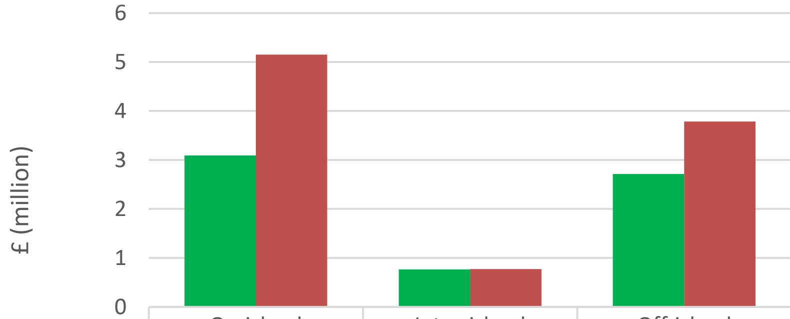
[17] Business Telecom's market share was too small to be presented in Figure 29.

Leased line revenues

Total revenues from retail leased lines in Guernsey in 2022 were £6.6m (£7.1m in 2021), and in Jersey in 2022 were £9.7m (£9.9m in 2021).

Figure 33 shows the breakdown of these totals by on-island, inter-island and off-island services.

Figure 33 – Revenues from retail leased lines by activity, 2022

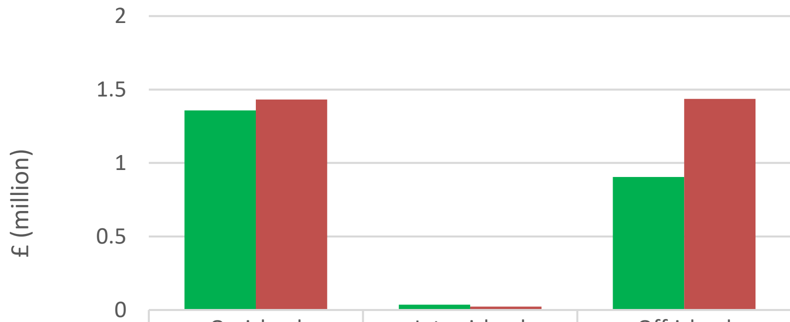


	On-island	Inter-island	Off-island
Guernsey	£3,092,311	£766,008	£2,716,640
Jersey	£5,152,625	£771,315	£3,786,971

Total revenues from wholesale leased lines in Guernsey in 2022 were £2.3m (£2.1m in 2021), and in Jersey in 2022 were £2.9m (£2.9m in 2021).

Figure 34 shows the breakdown of these totals by on-island, inter-island and off-island services.

Figure 34 – Revenues from wholesale leased lines by activity, 2022



	On-island	Inter-island	Off-island
Guernsey	£1,358,347	£36,000	£905,543
Jersey	£1,431,140	£23,916	£1,436,704

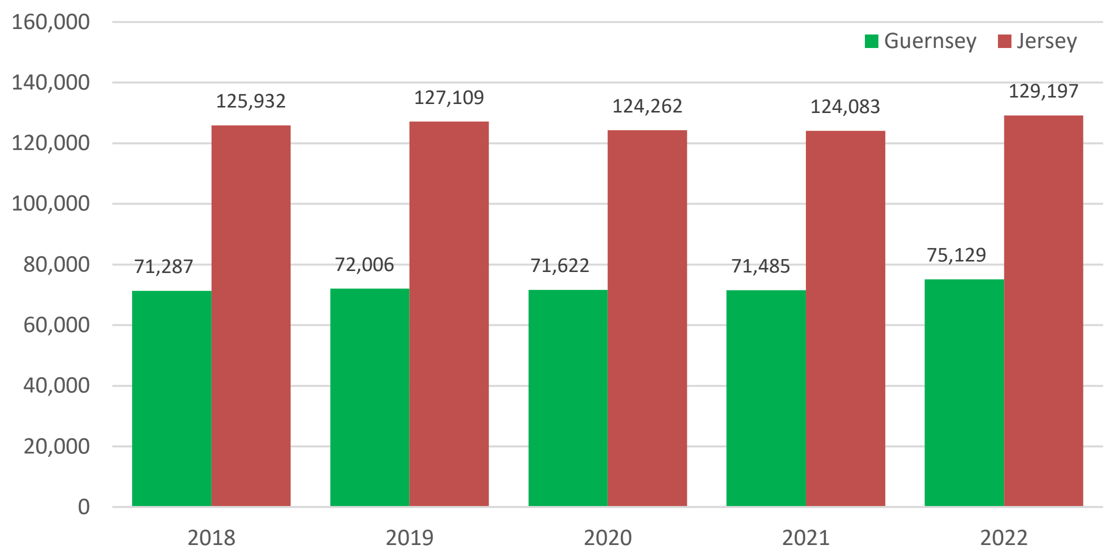
Mobile market

Subscriptions, penetration rates and market shares

In 2022, there were three Mobile Network Operators (MNO) with commercial activities in Jersey and Guernsey: Sure, JT and Airtel. Homenet retain access to these MNO networks in Jersey for data only.

Figure 35 shows the total number of mobile subscriptions in the Islands during the period 2018 to 2022. The figures include pre-paid (i.e. pay as you go) and post-paid (i.e. contract) subscriptions.

Figure 35 – Number of active mobile subscriptions in the Channel Islands, 2018 to 2022



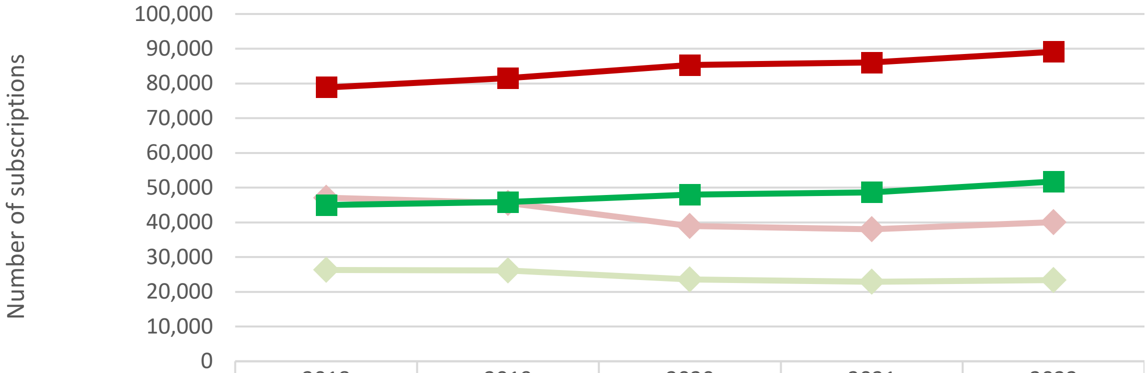
Overall, in 2022 the total number of mobile subscriptions in the Channel Islands increased by 4.5% to 204,326. In 2022, there was an increase in mobile subscriptions in Guernsey of 5.1% compared to 2021 and in Jersey there was an increase of 4.1%.

The upward trend in post-paid subscriptions continued in both Islands in 2022, whilst the downward trend in pre-paid subscriptions reversed in both Islands, increasing by 2.1% in Guernsey and 5.5% in Jersey compared to 2021.

Figure 36 on the next page provides a breakdown of pre-paid and post-paid mobile subscriptions in each Island over the period 2018 to 2022.[18]

[18] Pre-paid subscribers make payment in advance of using the service; typically they are not business users and have low levels of usage. In contrast, post-paid subscribers tend to have higher usage levels and are charged monthly in arears paying by direct debit. Figures in this report exclude pre-paid customers that have been deactivated in the last 12 months due to inactivity.

Figure 36 – Pre- and post-paid mobile subscriptions, 2018 to 2022



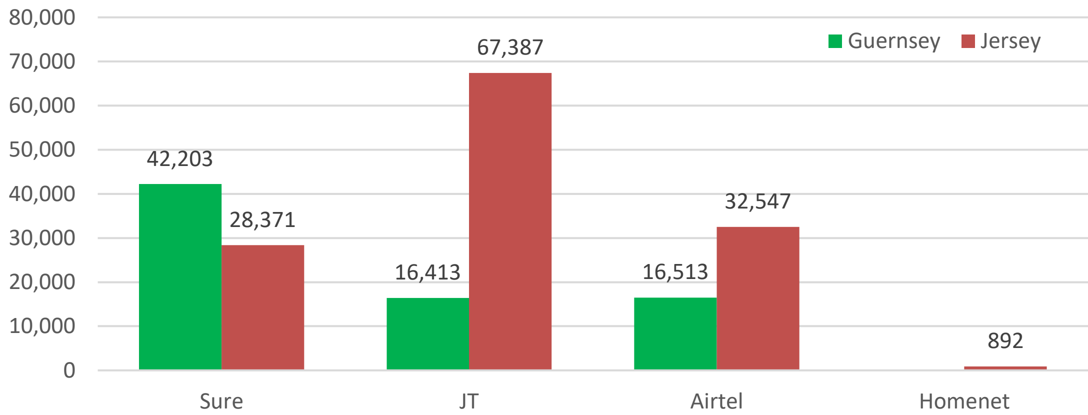
	2018	2019	2020	2021	2022
Jersey post-paid	78,830	81,487	85,314	86,076	89,118
Jersey pre-paid	47,102	45,622	38,948	38,007	40,079
Guernsey post-paid	44,991	45,901	48,009	48,590	51,760
Guernsey pre-paid	26,296	26,105	23,613	22,895	23,369

N.b. Jersey figures for 2018 have been adjusted since the published 2018 report

In common with many developed countries, the number of active mobile subscriptions in the Channel Islands is greater than the number of inhabitants. At the end of 2022 in Guernsey there were 118 active subscriptions per 100 inhabitants, and in Jersey there were 125 subscriptions per 100 inhabitants. These penetration rates in 2022 represent a slight increase on 2021. These penetration rates were lower than the UK (137 subscriptions per 100 inhabitants)[19].

Figure 37 provides a breakdown of the total number of mobile subscriptions for the 4 mobile operators in the Islands.[20]

Figure 37 – Number of mobile subscriptions by operator, 2022



Compared to 2021, all three operators have seen increased subscriptions in Guernsey: Sure has seen 2.1% growth, while Airtel and JT have seen 6.0% and 12.6% growth respectively. In Jersey, Airtel and JT have both grown their subscriptions (7.4% and 4.7%) while Sure has seen a decrease in subscriptions by 0.3%. Homenet's subscriptions have also declined by 10.8%.

[19] Communications Market Report 2022 (ofcom.org.uk). NB: in previous reports, data was reported for all OECD countries. This data is no longer available.

[20] All mobile operators report "Active Subscribers" based on a 90-day cycle period.

Figures 38 and 39 show the market shares of the mobile providers in Guernsey and Jersey respectively by numbers of subscriptions. The incumbent operators remained the largest providers in their respective home markets.

Figure 38 – Mobile market share by number of subscriptions – Guernsey

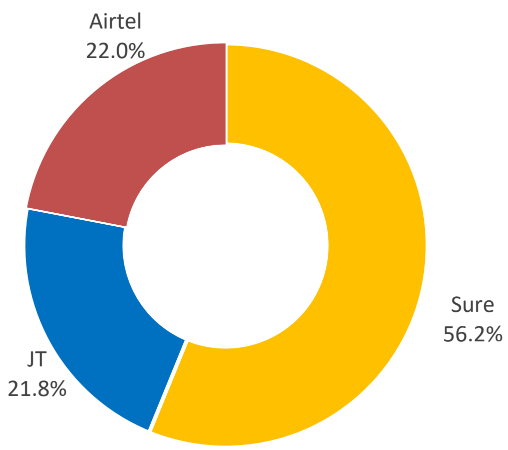


Figure 39 – Mobile market share by number of subscriptions – Jersey

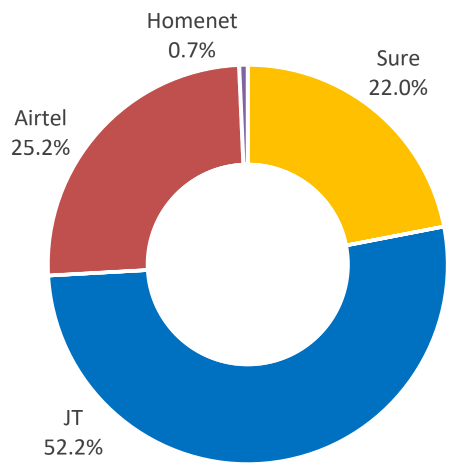


Table 6 shows the market shares of each operator in Guernsey and Jersey respectively between 2018 and 2022.

Table 6 – Mobile market share (%) of subscriptions in Guernsey and Jersey, 2018 to 2022

	Guernsey			Jersey			
	Sure	JT	Airtel	Sure	JT	Airtel	Homenet
2018	57	19	24	24	51	24	1
2019	56	20	23	24	51	24	1
2020	55	21	24	23	52	24	1
2021	58	20	22	23	52	24	1
2022	56	22	22	22	52	25	1

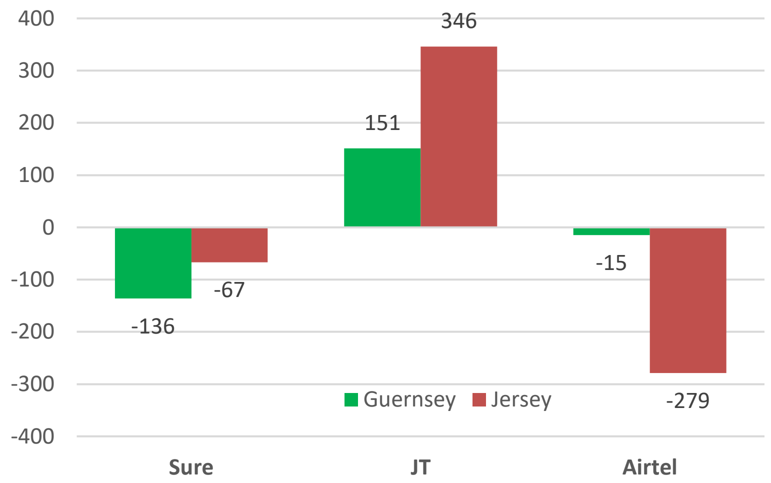
In Guernsey, the incumbent operator Sure lost market share in 2022, reversing some of the increase seen in 2021. In Jersey, market share between the four operators has remained largely unchanged since 2018.

Switching activity in the Guernsey and Jersey mobile markets

One measure of the competitive dynamics apparent in markets is the extent to which consumers switch from one supplier to another. Switching is usually associated with 'porting' whereby consumers switch from one supplier to another while keeping their telephone number; i.e. 'port' their mobile telephone number from one supplier to another. In the Channel Islands, number porting is available intra-Island but not inter-Island.

In Table 7, 'porting-in' describes the number of consumers moving to a new supplier and 'porting-out' describes the number of consumers leaving their existing supplier. In Figure 40, the net change in subscribers is shown, calculated by subtracting the number of subscribers 'porting-out' from the number 'porting -in'.

Figure 40 – Net number of consumers switching mobile service provider, 2022



Source: Porting XS MNP Channel Islands data 2022

In Jersey in 2022, Sure made a net gain of mobile consumers from JT, but made a net loss of subscribers to Airtel. In Guernsey, Sure made a net gain of subscribers from Airtel, but made a net loss of subscribers to JT. Overall, these changes led to only JT having a positive net number of consumers switching in both islands.

Table 7 – Mobile number porting activity in Guernsey and Jersey, 2022

	Guernsey			Jersey		
	Sure	JT	Airtel	Sure	JT	Airtel
Port in	572	585	435	840	1,155	578
Port out	708	434	450	907	809	857
Net benefit	-136	151	-15	-67	346	-279

Source: Porting XS MNP Channel Islands data 2022

Table 8 shows the percentage of registered mobile numbers that switched service provider in Guernsey and Jersey from 2018 to 2022. In Guernsey 2.1% of registered mobile numbers switched or "ported" between service providers in 2022, whilst in Jersey the figure was 2.0%. Porting activity remains at a level below that in the UK, where 10% of the active subscriber base ported in 2015.[21] [22]

[21] https://www.ofcom.org.uk/__data/assets/pdf_file/0023/38543/annex.pdf Page 38

[22] Ofcom has not published data on porting since 2015 – the level of porting activity may have changed since

Table 8 – Levels of mobile number switching in Guernsey and Jersey, 2018 to 2022

% of mobile subscribers switching provider	2018	2019	2020	2021	2022
Guernsey	2.8	2.5	2.3	3.2	2.1
Jersey	3.1	2.5	2.0	2.2	2.0

Source: Porting XS MNP Channel Islands data 2018 to 2022 and Industry questionnaires

1,592 mobile subscribers in Guernsey switched or "ported" between service providers in 2022. In Jersey, the equivalent figure was 2,573.

In 2022, the number of working days required to complete a successful port from one service provider to another was at 1.4 working days in both Guernsey and Jersey.[23] The European Commission's Universal Service Directive requires operators to provide porting within 1 working day.[24]

Table 9 – Average porting time in Guernsey and Jersey, 2016 to 2022

Average porting time (working days)	2016	2017	2018	2019	2020	2021	2022
Guernsey	1.2	1.2	1.2	1.2	1.1	1.3	1.4
Jersey	1.2	0.9	0.9	1.2	1.1	1.1	1.4

Average porting times in Guernsey increased to 1.4 working days in 2022 from 1.3 working days in 2021. This followed a period of stability at 1.2 working days between 2016 and 2019. Average porting times in Jersey increased to 1.4 working days in 2022, up from 1.1 days in 2020 and 2021.

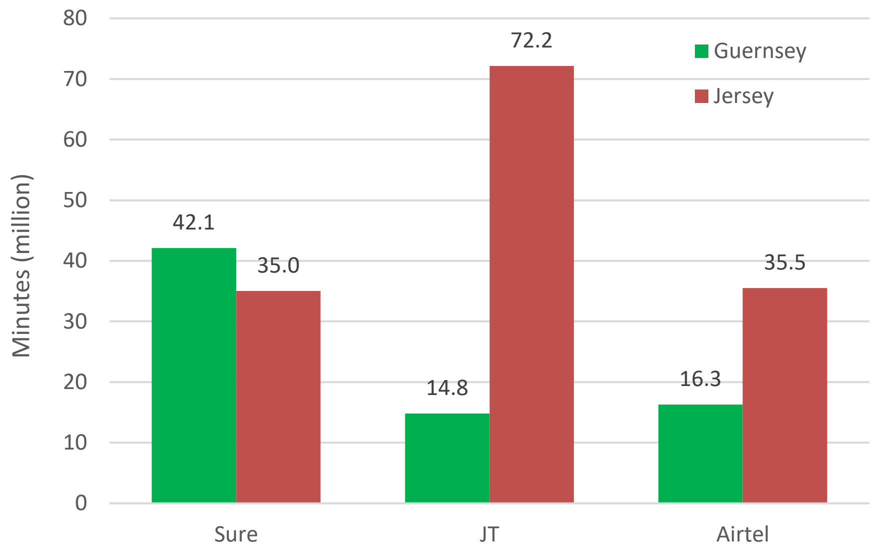
[23] Figures provided to the JCRA and GCRA by Porting XS

[24] http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32002L0022&from=en

Voice traffic - numbers of minutes

Figure 41 shows the number of mobile voice minutes originating on each operator's network in each Island in 2022. This included traffic derived from in-roaming activities. In-roaming is the use of mobile services by customers of operators outside of the Channel Islands while roaming on networks within the Channel Islands.

Figure 41 – Total number of mobile minutes originating on CI mobile networks, 2022



The total number of mobile minutes has decreased by 12.2% in Guernsey to 73.2 million in 2022 and has decreased by 8.8% in Jersey to 142.7 million.

Table 10 shows the average number of mobile voice minutes in 2022 for pre-paid and post-paid subscriptions. On the assumption that out-roaming minutes are overwhemingly associated with post-paid subscribers, these include all out-roaming voice minute activities. Out-roaming is the use of mobile services by customers of Channel Island operators while roaming on networks outside of the Channel Islands.

Table 10 – Average mobile voice minutes per pre-paid and post-paid subscription, 2022

	Guernsey	**Jersey**
Minutes per pre-paid subscriber	402	501
Minutes per post-paid subscriber	1,044	1,196

Source: Industry questionnaires

Compared to 2021, in Guernsey the number of minutes per pre-paid and post-paid subscriber have decreased by 18.3% and 15.6% respectively. In Jersey, minutes per pre-paid subscriber have decreased by 17.6% and minutes per post-paid subscriber have decreased by 12.6%.

SMS traffic – numbers of messages

Figure 42 shows the number of SMS text messages originating on each operator's network in each Island in 2022. These include SMS messages associated with in-roaming activities.

Figure 42 – Total number of SMS text messages originating on CI mobile networks, 2022

Overall, text volumes have continued to fall slightly in both Islands. In Guernsey, the number of messages decreased by 4.7% to 25.3 million; in Jersey the number of messages also decreased by 3.4% to 44.9 million.

Table 11 shows the average number of SMS text messages sent in 2022 for pre-paid and post-paid subscriptions. On the assumption that out-roaming text messages are overwhemingly associated with post-paid subscribers, these include all out-roaming messages.

Table 11 – Average SMS text messages per pre-paid and post-paid subscription, 2022

	Guernsey	Jersey
SMS messages per pre-paid subscriber	155	160
SMS messages per post-paid subscriber	240	308

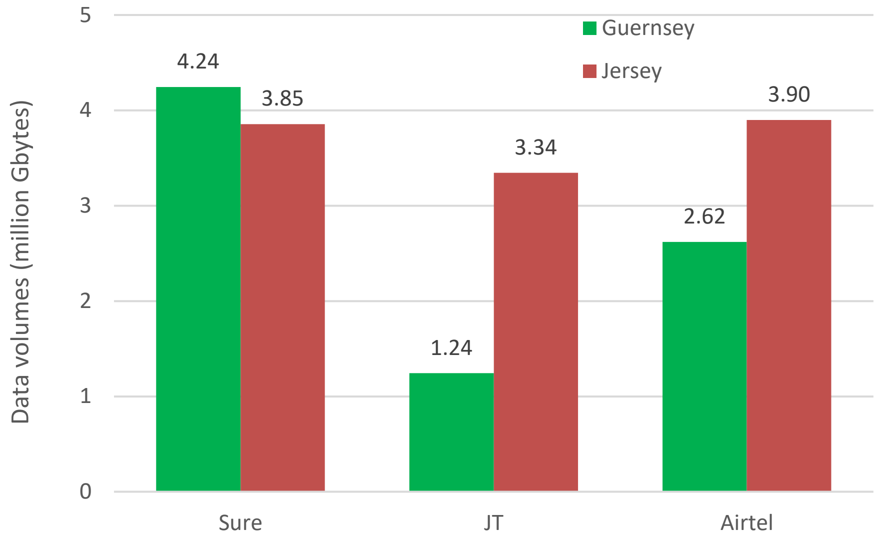
Source: Industry questionnaires

Compared to 2021, in Guernsey the number of SMS messages per pre-paid subscriber decreased by 17.3% and the number of SMS messages per post-paid subscriber decreased by 21.9%. In Jersey, the number of SMS messages per pre-paid subscriber decreased by 19.8% and the number of SMS messages per post-paid subscriber decreased by 14.8%.

Mobile data

Figure 43 shows the volume of data (in Gbytes) sent and received over each operator's network in each Island in 2022. These include data associated with pre-paid and post-paid mobile sims and in-roaming activities.

Figure 43 – Mobile data volumes (million Gbytes) sent and received on CI mobile networks, 2022



Overall, data volumes have continued to increase in both Islands. In Guernsey, the volume of data increased by 9.6% to 8.11 million Gbytes, and in Jersey the volume of data increased by 11.0% to 11.10 million Gbytes.

Table 12 shows the average data volume (in Gbytes) consumed in 2022 per Guernsey and Jersey pre-paid and post-paid subscription. On the assumption that out-roaming data activities are overwhemingly associated with post-paid subscribers, this includes all out-roaming data activities.

Table 12 – Average data volumes sent and received per pre-paid and post-paid subscription, 2021

	Guernsey	**Jersey**
Gbytes of data per pre-paid subscriber	89.84	72.70
Gbytes of data per post-paid subscriber	106.90	81.48

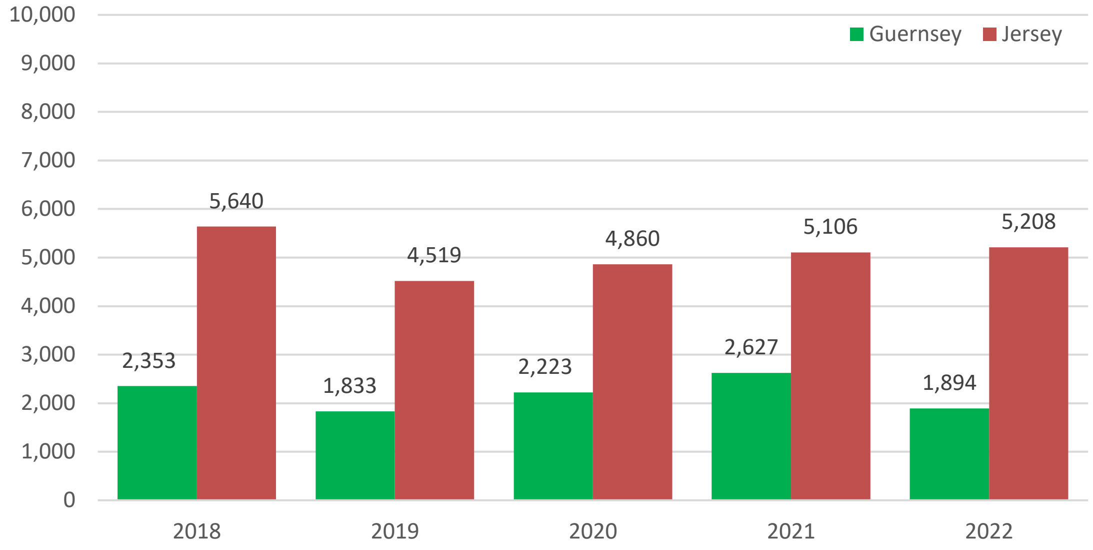
Compared to 2021, in Guernsey the volume of data per pre-paid subscriber increased by 13.8% and the volume of data per post-paid subscriber increased by 2.1%. In Jersey, the volume of data per pre-paid subscriber increased by 4.7% and the volume of data per post-paid subscriber increased by 5.6%.

As with most countries, the use of mobile for data purposes has been increasing while the number of SMS text messages has been falling.

Data only mobile SIMs

To monitor the changing nature of the mobile market, we collect data on SIM card types to understand the number of subscriptions per SIM card type.

Figure 44 – Number of data only subscriptions, 2018 to 2022



In 2022, there were 1,894 mobile subscriptions for data only in Guernsey, representing a decrease of 27.9%. In Jersey, there were 5,208 mobile subscriptions for data only, representing an increase of 2.0%.

Mobile revenue

Total revenues from mobile related activities in Guernsey in 2022 were £23.8m and in Jersey £39.4m. Revenue has increased in both Islands compared to 2021 (Guernsey increased by 9.0%, Jersey by 3.7%). Figures 45 and 46 provide a breakdown of the sources of mobile revenues.

Figure 45 – Sources of mobile revenue in Guernsey

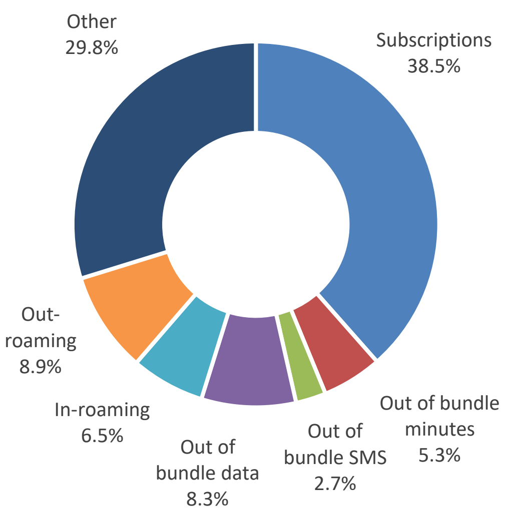
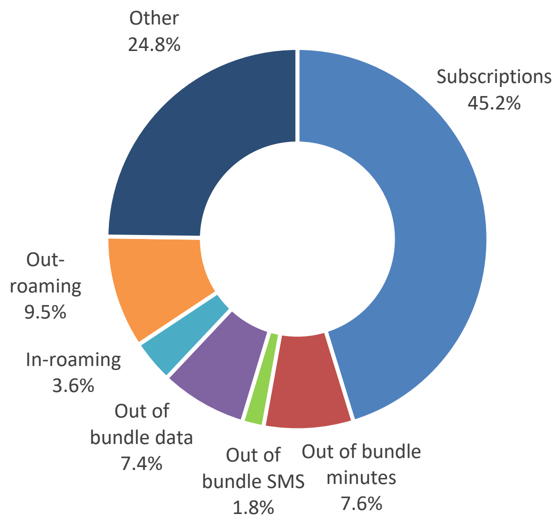


Figure 46 – Sources of mobile revenue in Jersey



Subscriptions include basic packages (with inclusive amounts of minutes, texts and data) and all "bolt-ons" for additional minutes, texts and data. Other revenues include items such as handsets and mobile termination charges.

Taking account of the different ways that operators structure their retail offerings, estimates of the average annual spend on usage related charges (as opposed to handsets and other ancillary services) are shown in Table 13. For this purpose, all out-roaming revenues are assumed to be associated with post-paid subscribers.

Table 13 – Annual and monthly spend per pre-paid and post-paid subscription, 2022

		Guernsey	Jersey
Pre-paid	During 2022	£115.93	£117.86
	Ave per month	£9.66	£9.82
Post-paid	During 2022	£240.03	£263.45
	Ave per month	£20.00	£21.95

In Guernsey, the spend per pre-paid subscriber has decreased by 10.0% compared to 2021, and the spend per post-paid subscriber has increased by 6.5%. In Jersey, the spend per pre-paid subscriber decreased by 6.5% compared to 2021, and the spend per post-paid subscriber increased by 7.9%.

Out-roaming

Out-roaming is the use of mobile services by customers of Channel Island operators while roaming on networks outside of the Channel Islands.

Out-roaming traffic levels

In Table 14, out-roaming call minutes relate to calls made and received by the mobile customers of Channel Island operators while roaming on networks outside the Channel Islands. Similarly, out-roaming SMS texts are those sent and received by Channel Island customers while using non-Channel Island networks and out-roaming data is data both sent and received by Channel Island customers while using non-Channel Island networks.

Table 14 – Out-roaming minutes, SMS texts and data volumes in the Channel Islands, 2022

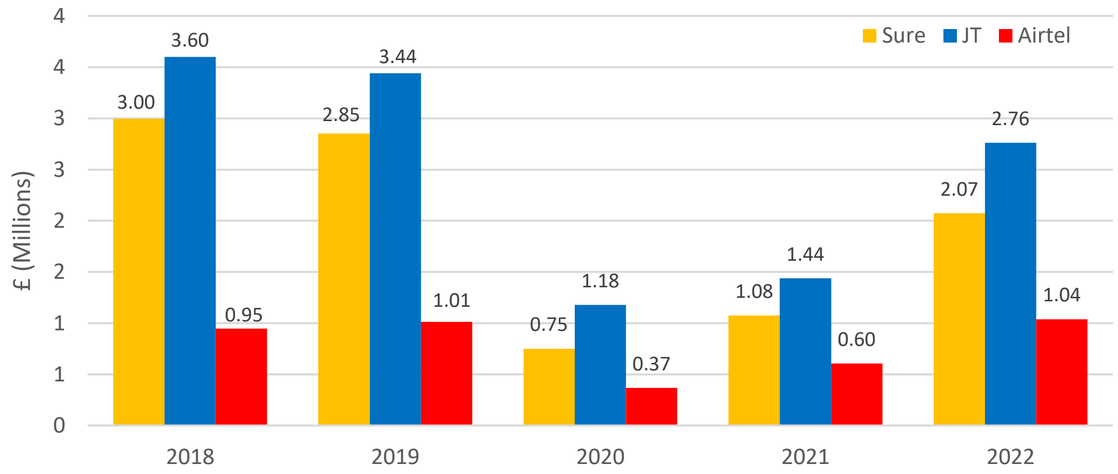
	Guernsey	Jersey
Minutes	1,778,482	4,297,580
SMS texts	554,293	1,212,236
Data (Gbytes)	32,572	128,202

Out-roaming revenues

In 2022, operators in the Channel Islands generated total revenues of £5.9m from out-roaming activities (compared to £3.1m in 2021): 9.8% of total mobile revenue (excluding in-roaming revenues).

Figure 47 shows total out-roaming revenues in the period 2018 to 2022, combining Guernsey and Jersey. Out-roaming revenues for the Channel Islands have risen 78.6% since 2021, however they are still below pre-pandemic levels.

Figure 47 – Total out-roaming revenues in the Channel Islands, 2018 to 2022



In-roaming

In-roaming is the use of mobile services by customers of operators outside of the Channel Islands while roaming on networks within the Channel Islands.

In-roaming traffic levels

In Table 15, in-roaming call minutes relate to calls made and received by the mobile customers of operators outside of the Channel Islands while roaming on networks within the Channel Islands. Similarly, in-roaming SMS texts are those sent and received by customers of non-Channel Island networks whilst roaming on Channel Island networks and in-roaming data is data both sent and received by non-Channel Island customers while using Channel Island networks.

Table 15 – In-roaming minutes, SMS texts and data volumes in the Channel Islands, 2022

	Guernsey	Jersey
Minutes	11,592,344	20,293,033
SMS texts	9,875,333	12,274,082
Data (Gbytes)	508,020	1,050,772

Not all operators were able to provide data on revenues generated from in-roaming activities, therefore total revenues are unable to be reported on for this year’s report.

Notes

Background to this report

Prior to 2019, Telecoms Market Reports were produced by the Channel Islands Competition and Regulatory Authorities (CICRA). The report started as the availability of timely and relevant market intelligence improves the ability of stakeholders, including customers, to make informed choices and supports the prioritising of their own resources as markets change and competition develops.

In 2019, Statistics Jersey was commissioned by CICRA to independently compile and the annual report, with previous historical data and questionnaire submissions being provided. In 2020, CICRA demerged into the Guernsey Competition & Regulatory Authority (GCRA) and the Jersey Competition Regulatory Authority (JCRA) but the agreement with Statistics Jersey has continued.

In 2022, due to changing demands and technologies, and following engagement with operators, the data collection process was reviewed and new questions subsequently added. Where operators were able to provide data, these new sections have been presented in the report. Future iterations will look to include further new areas, for example greater reporting on network reliability and time taken to repair faults.

Inhabitants

The number of inhabitants of the Islands is used to standardise various metrics throughout the report. The numbers are as follows:

Guernsey	63,711 estimated on 31 March 2022
Jersey	103,267 estimated on 21 March 2021

Glossary of terms

Broadband connection - active high-speed Internet access connection, provided by either wireline or wireless delivery technologies, which could be provided with other fixed or mobile services.

Bytes – a volume of measure in a digital system.

1 Kilobyte (KB) = 1,024 Bytes. 1 Megabyte (MB) = 1,024 KB. 1 Gigabyte (GB) = 1,024 MB.

Fixed calls - calls billed as part of a monthly subscription allowance and billed separately (when charged per minute) of all outgoing calls originating on a fixed network in the Channel Islands during the year, to all destinations i.e., Channel Islands, international, non-geographic, fixed and mobile.

Fixed connection – active telephone line (PSTN or ISDN) retailed by a telecommunications operator, identified by having a fixed line telephone number (area code + 6-digit local number) plus fixed wireless connections which may or may not have an associated telephone number.

Mobile connection – mobile phone retail connection on a telecommunications operator's network with a mobile telephone number that has been active within the previous 90 days.

Roaming – the practice of using a mobile phone on another operator's network.

In-roaming refers to the use of mobile services by customers of operators outside of the Channel Islands while roaming on networks within the Channel Islands.

Out-roaming refers to the use of mobile services by customers of Channel Island operators while roaming on networks outside of the Channel Islands.

Subscription - individual telephone number or connection, whether fixed or mobile. It is important to bear in mind that it does not apply to an individual; a person or a business may use a number of connections and telephone numbers each of which counts as one subscription.

Statistics Jersey

20 June 2023

Appendix

Off-Island links

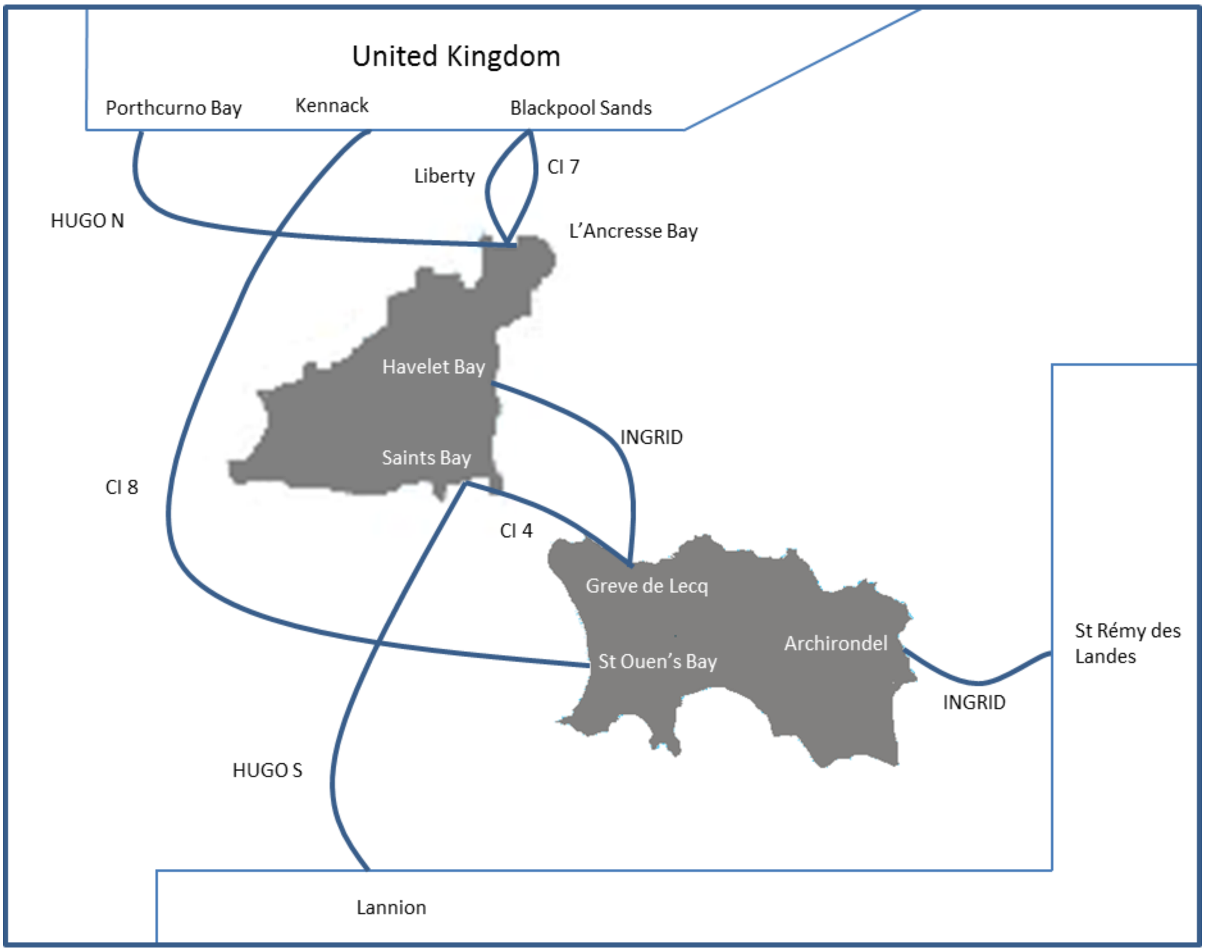
Off-island links are an important part of the telecoms infrastructure for Guernsey and Jersey, ensuring connectivity with the UK and Europe, and wider world. As part of this report the status of the off-island links is monitored and reported on to help ensure transparency about this important area.

Cable dispositions

Jersey and Guernsey have multiple submarine cables carrying voice, data and internet traffic between the Islands and to the U.K. and France. The existence of multiple routes for the transmission of information gives resilience, with different possibilities for the routing of traffic.

Not only are there multiple connections with the U.K. and France, but the four cables connecting the Channel Islands and the U.K. have three different landing points. The cables to France also have different termination points. Figure 48 gives a representation of the geographic distribution of cables and shows the multiple routes possible for traffic between Islands and outside of Guernsey and Jersey.

Figure 48 – Schematic representation of cable links (excluding UK to France)



Source: Industry questionnaires and various public sources

Cable capacities and utilisation

Modern systems for the transmission of information allow large amounts of data to be passed over fibre-optic cables. Dense Wavelength Division Multiplexing (DWDM) allows the transmission of multiple wavelengths over the same fibre strand, thus making the available bandwidth extremely large. The DWDM equipment fitted to most of the cables allows multiple 10Gbps wavelengths per fibre. Multiple fibres are present in each cable.

The management of traffic over cables is dynamic, and the amount of traffic is not measured in the same way by all operators, however the number of wavelengths in use and the information with which we have been provided makes clear that capacity is well in excess of usage at peak times. It is also clear that the re-routing of traffic in the event of damage to individual or even multiple cables is entirely achievable, as was demonstrated in 2016 when more than one cable to Jersey was severed in a marine incident but there was no significant impact on the Island’s communications traffic as a result of effective co-operation between operators.

Data Tables

Table A1 - Total turnover of the telecommunications industry in the Channel Islands, £ million

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	75.4	70.3	69.0	64.1	61.4	61.6	63.1	69.6	70.8
Jersey	144.4	98.2	97.8	101.9	101.2	105.9	104.1	107.8	105.4
Channel Islands	**219.8**	**168.5**	**166.8**	**166.0**	**162.6**	**167.5**	**167.2**	**177.4**	**176.1**

Table A2 - Full-time equivalent employees in the telecommunications sector

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	237	236	227	227	222	212	211	209	224
Jersey	464	433	505	506	554	592	583	545	537
Channel Islands	**701**	**669**	**732**	**733**	**776**	**804**	**794**	**754**	**761**

Table A3 – Capital investment in the telecommunications industry in the Channel Islands, £ million

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	8.8	22.5	10.0	4.9	5.2	16.1	3.6	8.2	6.2
Jersey	22.4	21.3	22.6	23.3	19.6	18.7	17.5	13.1	9.4
Channel Islands	**31.2**	**43.8**	**32.6**	**28.2**	**24.8**	**34.7**	**21.1**	**21.3**	**15.6**

Table A4 – Number of retail fixed lines and subscriptions in the Channel Islands, thousands

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	51.6	36.5	36.6	36.0	35.7	34.0	33.9	33.9	33.4
Jersey	36.5	55.9	58.3	55.9	47.9	47.4	48.0	48.1	48.1
Channel Islands	**88.2**	**92.5**	**95.0**	**91.9**	**83.6**	**81.5**	**81.9**	**82.1**	**81.5**

Table A5 – Number of fixed line minutes, millions

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	76.9	73.6	72.1	70.2	68.2	62.3	67.0	54.9	44.7
Jersey	140.4	128.7	120.1	110.8	99.0	87.4	96.9	72.8	59.7
Channel Islands	**217.3**	**202.3**	**192.2**	**181.0**	**167.2**	**149.8**	**163.9**	**128.7**	**104.4**

Table A6 – Numbers of fixed broadband subscriptions in the Channel Islands, excluding data only mobile broadband, thousands

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	23.5	23.8	23.2	24.0	24.4	24.9	25.3	25.9	26.3
Jersey	36.4	36.1	35.9	37.2	37.9	38.4	39.7	40.7	42.2
Channel Islands	**59.9**	**59.9**	**59.1**	**61.2**	**62.3**	**63.3**	**65.0**	**66.6**	**68.5**

Table A7 – Numbers of fixed broadband subscriptions in the Channel Islands, including data only mobile broadband, thousands

	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	24.6	24.6	25.5	26.8	26.7	27.6	28.5	28.2
Jersey	37.9	39.2	41.2	43.6	42.9	43.5	45.8	47.4
Channel Islands	**62.4**	**63.8**	**66.7**	**70.3**	**69.6**	**71.1**	**74.3**	**75.6**

Table A8 – Number of retail leased lines in the Channel Islands

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	495	571	575	642	622	705	760	635	653
Jersey	810	1030	1061	1017	937	1005	745	694	729
Channel Islands	**1305**	**1601**	**1636**	**1659**	**1559**	**1710**	**1505**	**1329**	**1382**

Table A9 – Number of wholesale leased lines in the Channel Islands

	2018	2019	2020	2021	2022
Guernsey	281	314	287	260	232
Jersey	306	249	207	202	207
Channel Islands	**587**	**563**	**494**	**462**	**439**

Table A10 – Number of active mobile subscriptions in the Channel Islands, thousands

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	68.5	71.2	71.2	68.8	71.3	72.0	71.6	71.5	75.1
Jersey	119.0	122.7	121.8	120.9	125.9	127.1	124.3	124.1	129.2
Channel Islands	**187.5**	**193.9**	**192.9**	**189.7**	**197.2**	**199.1**	**195.9**	**195.6**	**204.3**

Table A11 – Number of pre-paid mobile subscriptions in the Channel Islands, thousands

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	30.0	30.8	29.5	26.4	26.3	26.1	23.6	22.9	23.4
Jersey	52.5	53.8	49.6	46.5	47.1	45.6	38.9	38.0	40.1
Channel Islands	**82.4**	**84.7**	**79.2**	**72.9**	**73.4**	**71.7**	**62.6**	**60.9**	**63.4**

Table A12 – Number of post-paid mobile subscriptions in the Channel Islands, thousands

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	38.6	40.4	41.7	42.4	45.0	45.9	48.0	48.6	51.8
Jersey	66.6	68.8	72.1	74.4	78.8	81.5	85.3	86.1	89.1
Channel Islands	**105.2**	**109.2**	**113.8**	**116.8**	**123.8**	**127.4**	**133.3**	**134.7**	**140.9**

Table A13 – Levels of mobile number switching, % of mobile subscribers

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Guernsey	3.5	1.9	1.6	2.8	2.8	2.5	2.3	3.2	2.1
Jersey	4.5	3.4	2.4	3.7	3.1	2.5	2.0	2.2	2.0