

Telecommunications Statistics and Market Report 2023



www.gcra.gg



www.jcra.je

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 Guernsey¹ and Jersey. It covers the calendar year 2023 and is based primarily on data submitted by the licensed telecommunications operators during the first half of 2024. All currency numbers in this report are presented in nominal terms and have not been adjusted to account for inflation unless stated otherwise.

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 9.3% in 2023 to £82.85 in Guernsey, and by 3.9% to £80.29 in Jersey
- Total **turnover** increased in Guernsey by 5.8% to £75.3m in 2023, and by 5.1% to £112.6m in Jersey
- **Employment** within the telecommunication sector increased in Guernsey by 4.5%, with 234 full-time equivalent staff in 2023, however employment in Jersey has reduced by 5.8% since 2022 to 506 full-time equivalent staff
- In 2023, both Islands showed a decline in the number of **fixed call network minutes** (Guernsey by 17.3% and Jersey by 16.5%), continuing the decreasing trend since 2020
- **Broadband penetration rates** in both Islands were higher than the OECD average (35.6) and similar to the UK (41.6): Guernsey had 41.8 subscriptions per 100 inhabitants and Jersey 41.6
- **Data usage** in both Islands remains below the UK average (535 Gbytes per month): Guernsey subscribers used on average 357 Gbytes per month (up 12.7% on 2022); in Jersey this figure is 396 Gbytes per month (up 12.1% on 2022)
- Meanwhile, **text volumes** have continued to fall in both Islands, decreasing by 12.9% in Guernsey and by 15.9% in Jersey
- The total **number of mobile call minutes** decreased by 12.9% in Guernsey in 2023 and 12.3% in Jersey
- **Mobile data volumes** increased by 10.6% in Guernsey and 34.3% in Jersey
- Total **mobile revenue** has increased in both Islands since 2022: 1.6% in Guernsey and 5.1% in Jersey

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

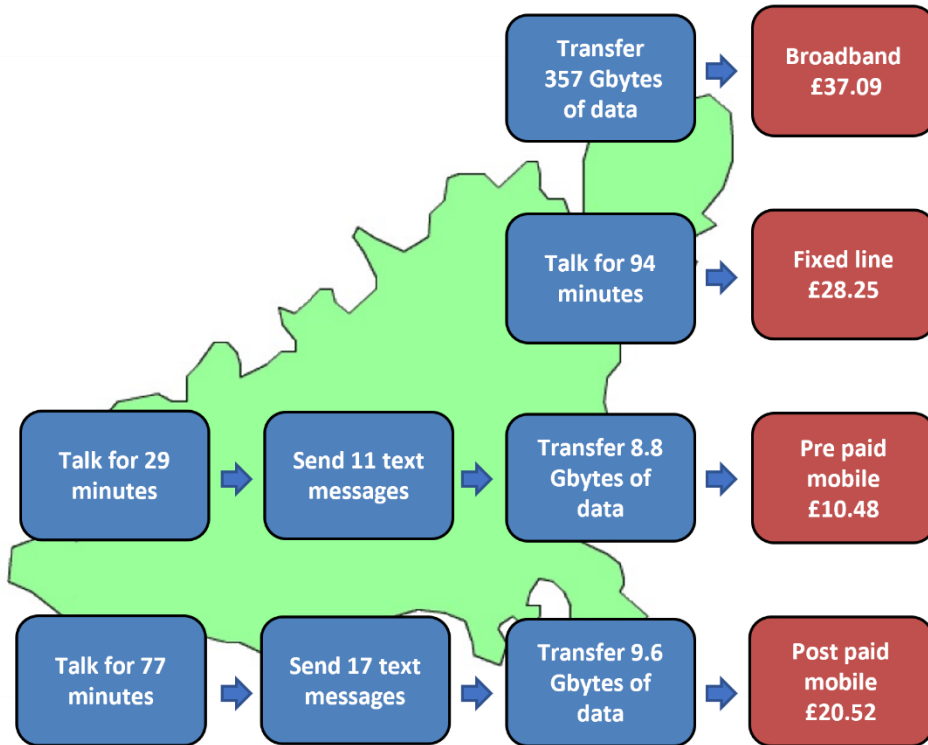
Contents

Introduction.....	1
Summary	1
Consumer snapshot in 2023.....	4
Average monthly consumer spend on telecoms services.....	5
Consumer data usage.....	5
Consumer voice and message use	6
Subscriptions	7
Economic statistics for the telecommunications sector	8
Turnover of the telecommunications sector.....	9
Employment in the telecommunications sector	11
Taxation contributions	11
Capital investment	12
Fixed network market	13
Fixed line telephony market.....	13
Total number of lines and subscriptions	13
Alternative carrier services.....	13
Fixed telephony minutes	14
Fixed network penetration rates.....	15
Revenues	15
Fixed network broadband market.....	16
Subscriptions and penetration rates.....	16
Market share by numbers of fixed broadband subscriptions	17
Broadband download speeds.....	19
Data volumes.....	20
Revenues	20
Average revenue per subscription	20
Leased line market	21
Market share by numbers of leased line subscriptions	23
Leased line revenues	24
Mobile market.....	25
Subscriptions, penetration rates and market shares	25
Switching activity in the Guernsey and Jersey mobile markets	28
Voice traffic - numbers of minutes.....	30
SMS traffic - numbers of messages	30
Mobile data	32
Data only mobile SIMs.....	33
Mobile revenue	34
Out-roaming traffic levels	35

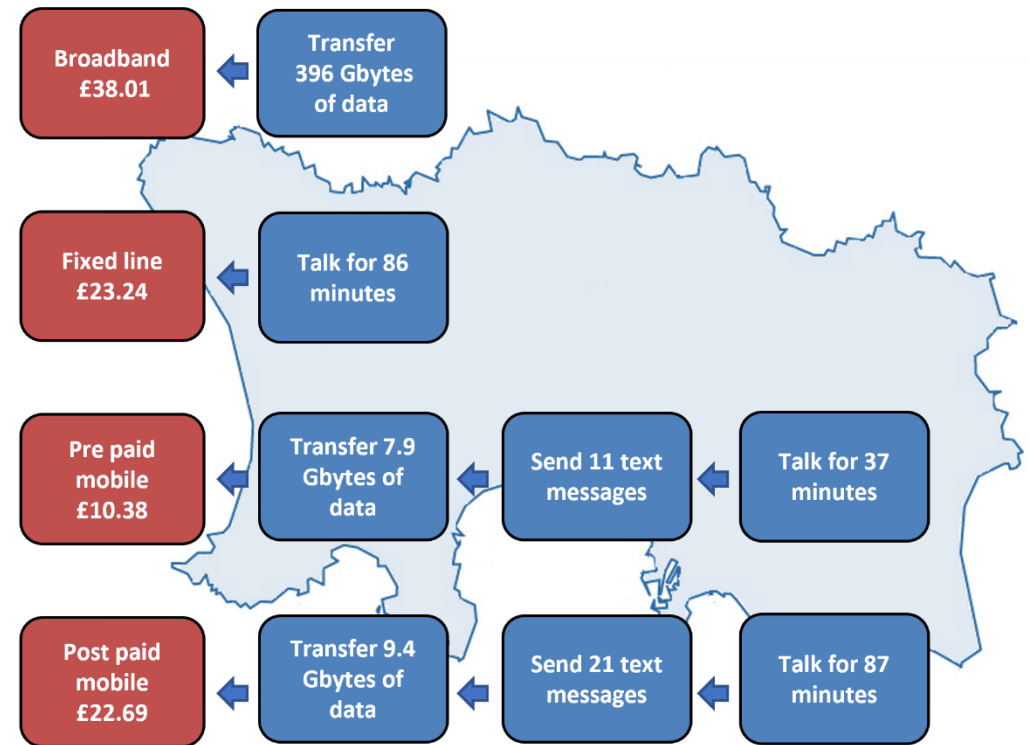
Out-roaming revenues	35
In-roaming traffic levels	36
Notes	37
Appendix.....	38
Off-Island links.....	38
Cable dispositions.....	38
Cable capacities and utilisation.....	39
Data Tables.....	40

Consumer snapshot 2023

Guernsey consumer average monthly activity



Jersey consumer average monthly activity

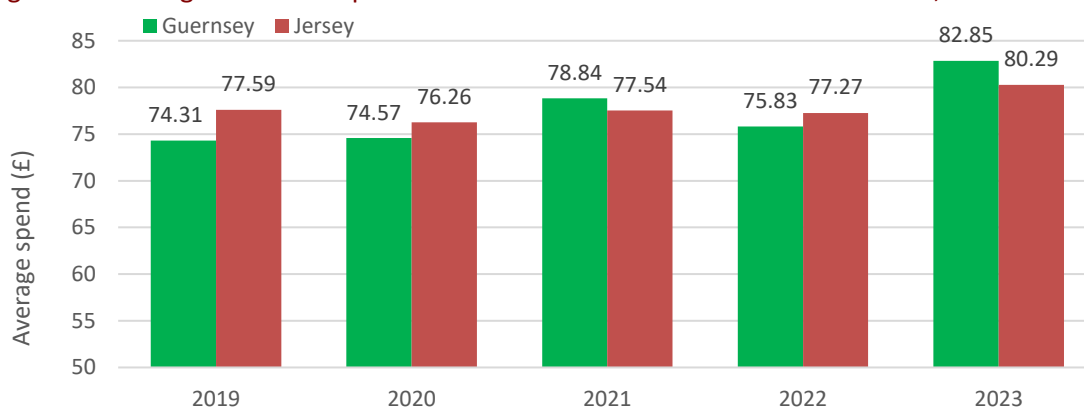


Average monthly consumer spend on telecoms services

Average monthly consumer spend on telecoms services in the Channel Islands was £81.39 in 2023; up from £76.83 in 2022.² This includes expenditure on broadband, fixed line and mobile services.³

As shown in Figure 1, average monthly spend in Guernsey increased by 9.3% to £82.85 in 2023, and in Jersey increased by 3.9% to £80.29 compared to 2022.

Figure 1 – Average consumer spend on telecoms services in the Channel Islands, 2019 to 2023⁴

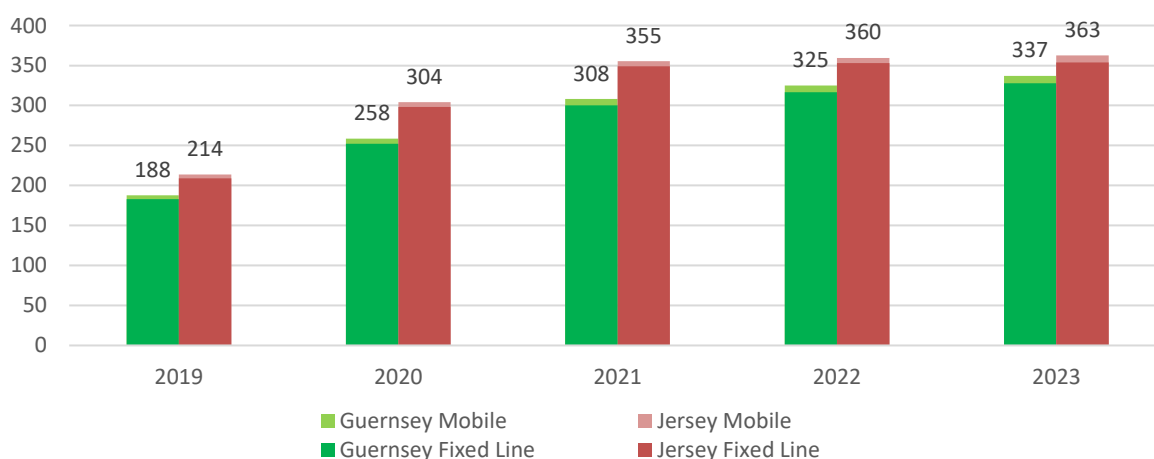


Consumer data usage

Average monthly data download usage by consumers in the Channel Islands was 353 Gbytes in 2023; up from 346 Gbytes in 2022.

As shown in Figure 2, average data download usage increased in Guernsey by 3.8% to 337 Gbytes in 2023 compared to 2022. This was made up of 9 Gbytes of mobile data and 328 Gbytes of fixed line broadband download data. In Jersey, average data usage increased by 0.9% to 363 Gbytes; this was made up of 9 Gbytes of mobile data and 354 Gbytes of fixed line broadband download data.

Figure 2 – Average data download usage in the Channel Islands, 2019 - 2023⁵



² 2022 figures have been revised based on updated information

³ The methodology for average monthly spend assumes each customer has one broadband, fixed line and mobile subscription. Total spend on each of these is divided by the number of subscribers, then combined to give total average spend

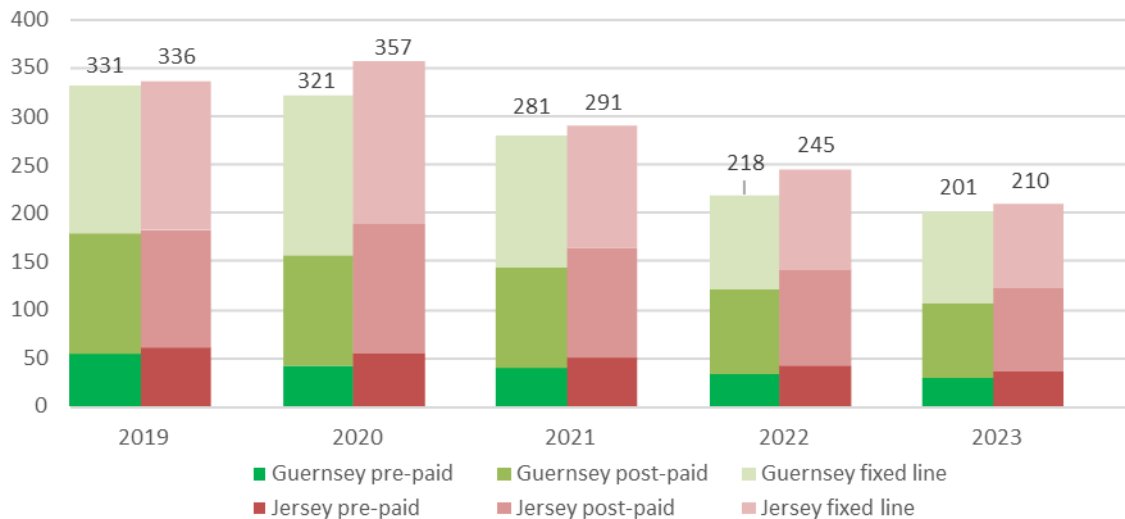
⁴ The methodology to calculate average consumer spend was updated in 2022 – the data for 2019 to 2021 in Figure 1 will not be consistent with previous reports

⁵ Not all providers were able to provide usage breakdowns so some data has been imputed to provide these figures. Broadband data in Figure 2 refers to data downloaded only due to lack of information on data uploaded prior to 2022.

Consumer voice and message use

In 2023, Jersey consumers made on average 86 fixed line minutes, 37 pre-paid and 87 post-paid mobile call minutes per month; this represented a decrease of 14.3% on 2022. The equivalent figures for Guernsey were 94 fixed line minutes, 29 pre-paid and 77 post-paid mobile call minutes; this was a decrease of 8.0% on 2022.⁶

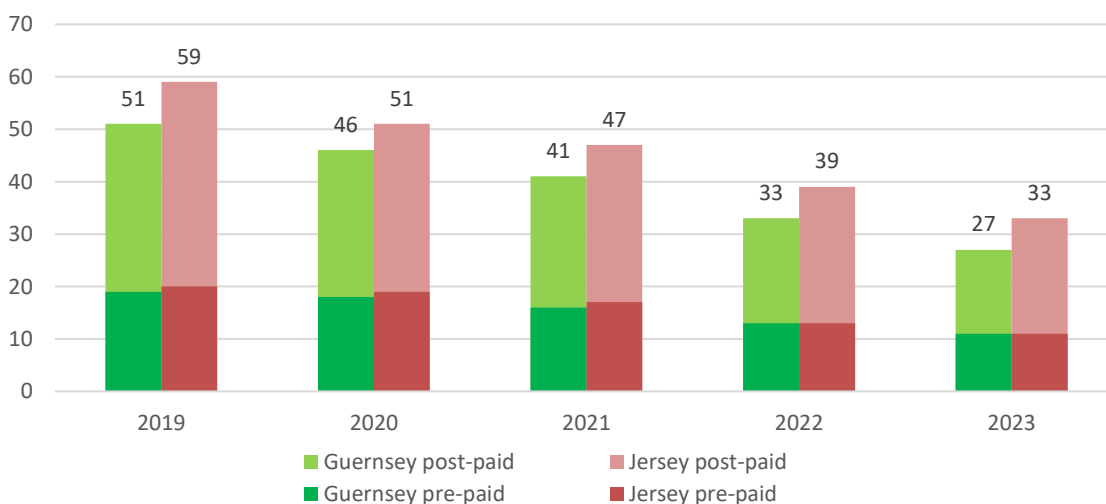
Figure 3 – Average monthly fixed, pre- and post-paid call minutes made in the Channel Islands, 2019 – 2023



in 2023, Jersey consumers sent on average 11 pre-paid and 21 post-paid SMS messages per month; this represented a decrease of 16.7% on 2022. The equivalent figures for Guernsey in 2023 were 11 pre-paid and 17 post-paid messages; this was a decrease of 16.4% on 2022.

As Figure 4 shows, the average number of pre-paid and post-paid messages sent per subscriber in both Islands has been decreasing since 2019.

Figure 4 – Average monthly pre- and post-paid SMS messages in the Channel Islands, 2019 - 2023⁷



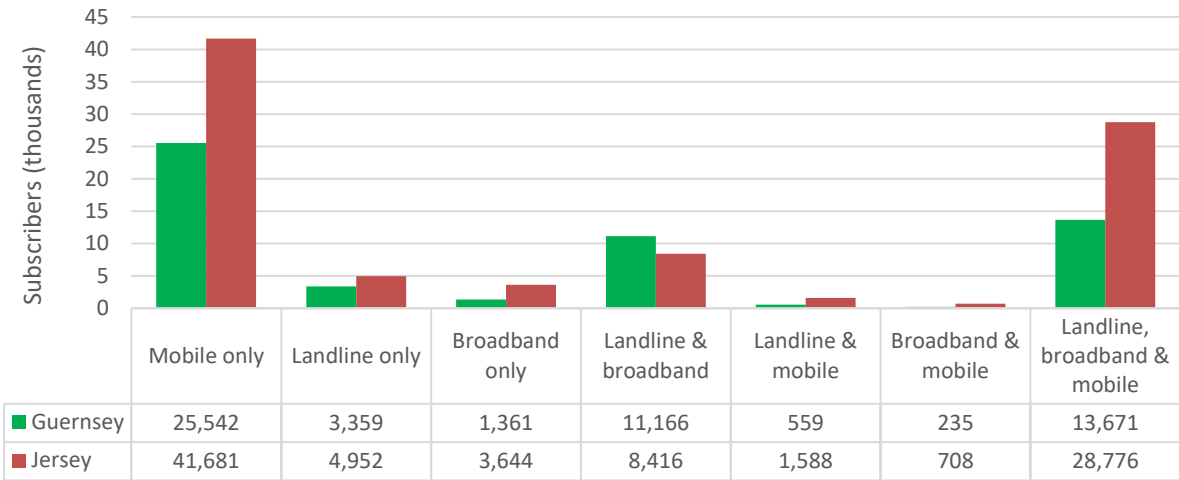
⁶ The 2022 figure for Guernsey has been revised since the 2022 report based on updated information

⁷ The 2019 and 2021 Guernsey figures have been updated since the 2022 report

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, 2023



In the Channel Islands, around two-fifths of subscriptions were bundles, no changes on 2022. In Jersey, 44.0% of subscriptions were part of a combined package; the figure in Guernsey was 45.9%.

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

Figure 6 – Subscriptions by package type in Guernsey, 2023

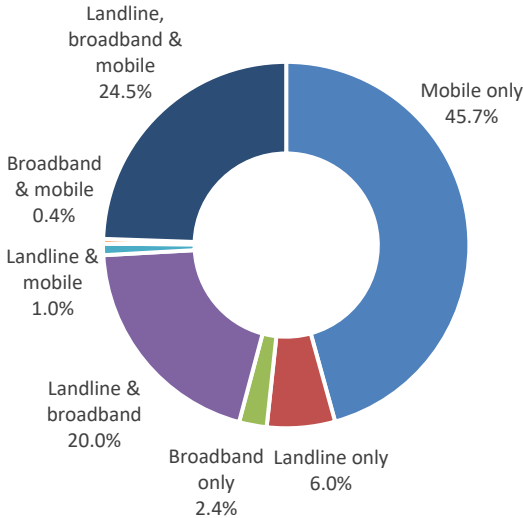
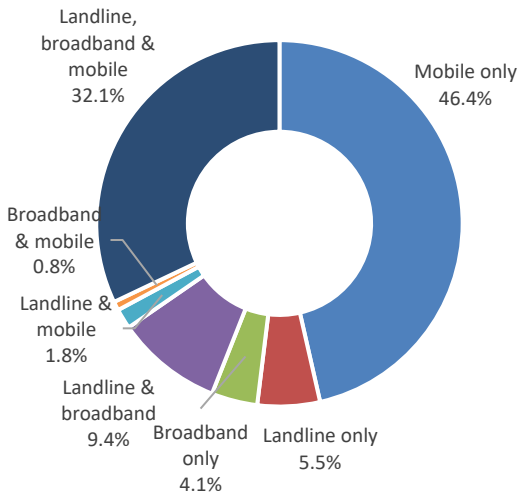


Figure 7 – Subscriptions by package type in Jersey, 2023



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

The bundle type with the largest number of subscribers in both Islands were packages containing landline, broadband and mobile: in Guernsey 24.5% of subscriptions were for bundle types containing all three products. In Jersey 32.1% of subscriptions were for this package type.

In Guernsey, one fifth (20.0%) of subscriptions were for a landline & broadband bundle, compared to 9.4% of subscriptions in Jersey.

Economic statistics for the telecommunications sector



£75 million

Total revenues from Guernsey-based customers



£6.9 million

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



234 staff employed

In Guernsey in the supply of telecommunication services to Guernsey customers as at the end of 2023



£16 million

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



593

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



£113 million

Total revenues from Jersey-based customers



£14.7 million

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



506 staff employed

In Jersey in the supply of telecommunications services to Jersey customers as at the end of 2023



£25 million

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



683

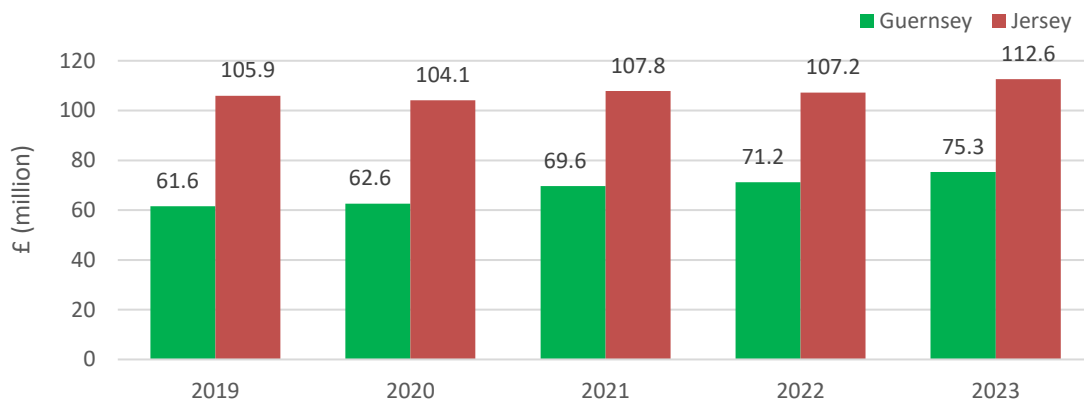
Retail leased lines, primarily used by organisations for voice or data services

Turnover of the telecommunications sector

Total turnover of the telecommunications industry in the Channel Islands (including fixed, mobile, broadband, the sale of handsets and the provision of telecommunications associated with data centre/hosting services) was £188.0m in 2023, up 5.3% from £178.4m in 2022⁸. Turnover includes revenues associated with Channel Island subscribers while on and off the Islands, plus revenue from visitors to the Islands in 2023.

As shown in Figure 8, total turnover in Guernsey increased by 5.8% to £75.3m in 2023 compared to 2022. In Jersey, total turnover increased by 5.1% to £112.6m.

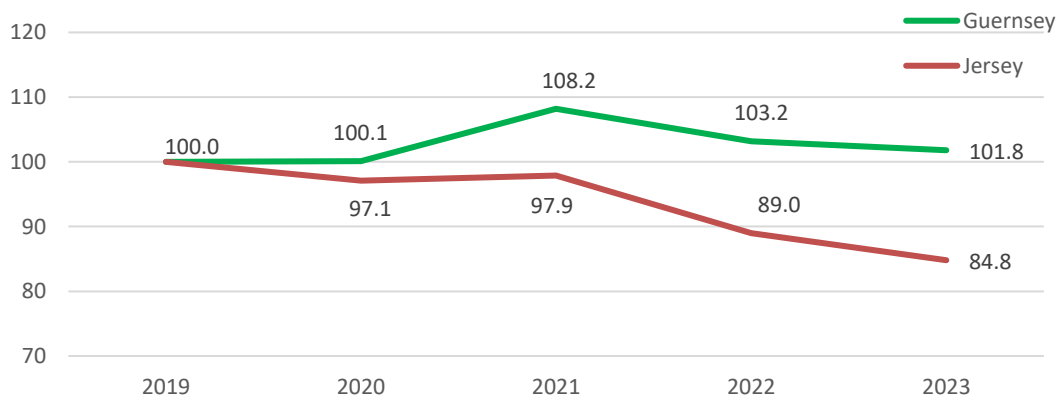
Figure 8 – Total turnover of the telecommunications industry in the Channel Islands, 2019 to 2023



Note: 2022 figures have had adjustments since the 2022 report based on updated information

Figure 9 shows the trend of turnover in real terms over time, with the index set to 100.0 in 2019.

Figure 9 – Index of total real-terms turnover in the Channel Islands, 2019 to 2023



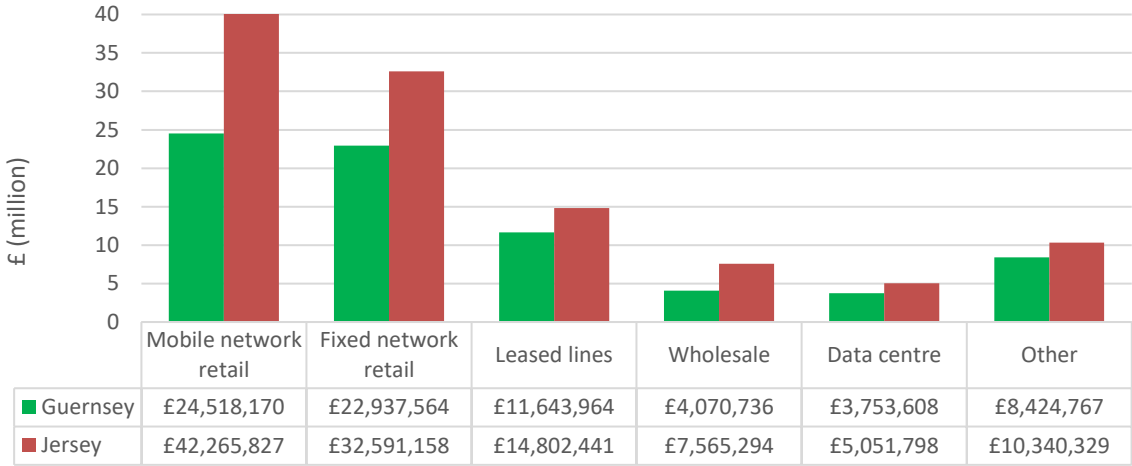
While in nominal terms, total turnover in Jersey has increased since 2019; in real terms⁹, turnover has decreased following a sharp downturn after 2021. In Guernsey, real terms turnover has fluctuated over the years but still represents a slight increase since 2019.

⁸ 2022 revenues have been revised since the 2022 report based on updated information

⁹ Inflation was relatively high over the period 2022 – 2023. Jersey saw retail price increases of 9% (2022) and 10% (2023) per annum; Guernsey's retail price increases were 7% in both years. This is compared to increases of below 3% across both jurisdictions in 2021.

Figure 10 below shows the total turnover segmented into the different types of telecommunications activity in 2023. 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, 2023



Note: 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 32.5% of the total turnover. Mobile network retail also generated the highest turnover in Jersey, representing 37.5% 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 2023

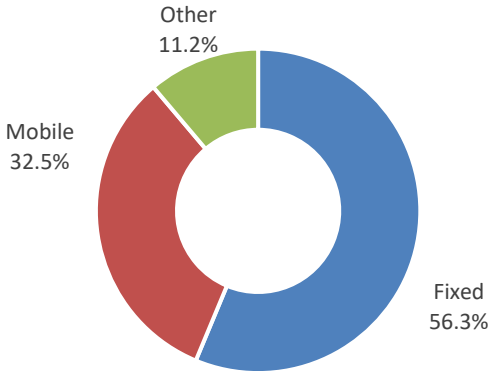
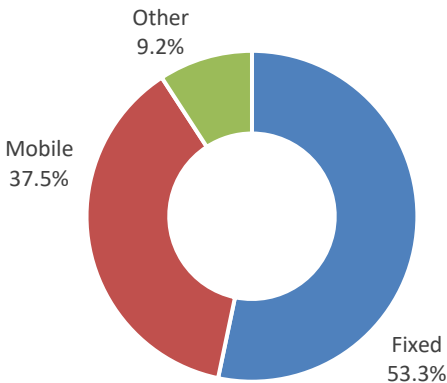


Figure 12 – Total turnover by key service category, Jersey 2023



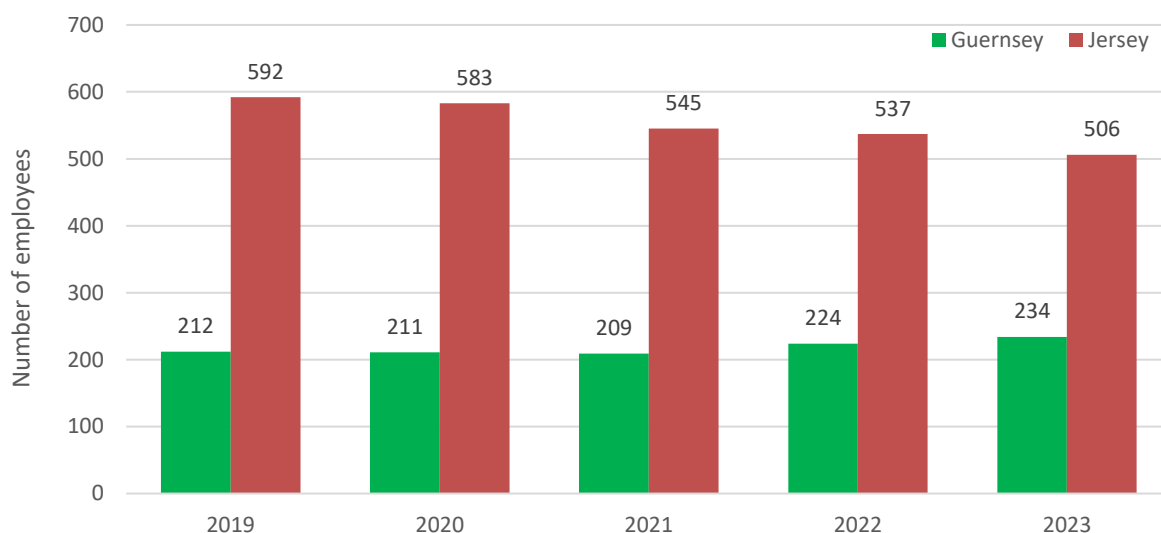
The service category with the biggest share of turnover in Guernsey and Jersey was the fixed sector. In 2023 in Guernsey, it accounted for 56.3% of total turnover, whilst in Jersey it accounted for 53.3%. Both Islands have experienced an increase in revenues in the fixed sector since 2022¹⁰ (2.9% in Guernsey and 2.4% in Jersey). Mobile sector revenues also increased in both Islands (by 3.1% in Guernsey and 4.7% in Jersey).

¹⁰ 2022 figures for both Guernsey and Jersey have been revised since the 2022 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 2019. Across the Islands, the sector employed 740 full time equivalent staff at the end of 2023, representing a decrease of 21 staff and continuing the overall downward trend seen since 2019.

Figure 13 – Full-time equivalent employees in the telecommunications sector, 2019 to 2023

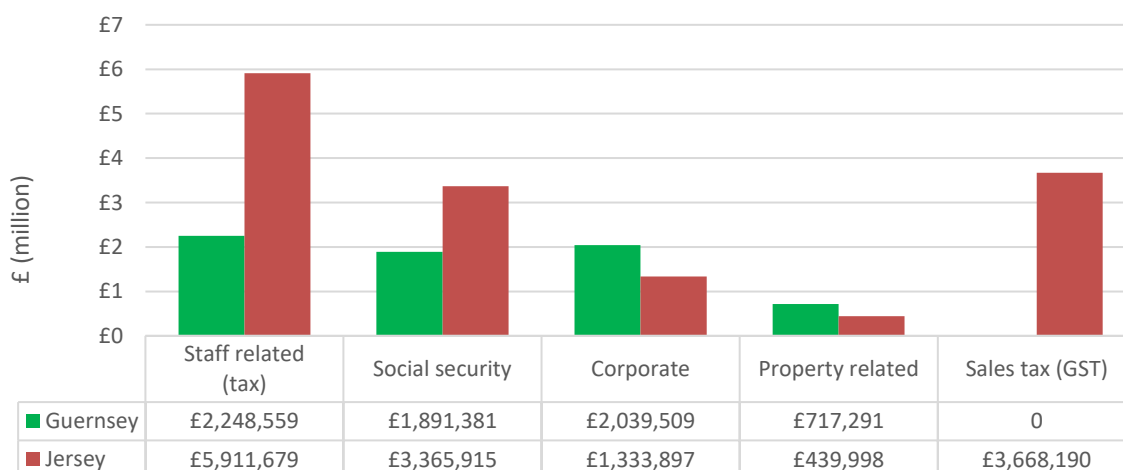


In 2023, there were 2.2 times as many staff employed in the telecommunications sector in Jersey than in Guernsey. Since 2019, the number of employees in the telecommunications sector in Jersey has decreased by 14.5 %, while the number of employees in Guernsey has increased by 10.4%.

Taxation contributions

Figure 14 shows that the telecommunications sector contributed £21.6m in taxation in 2023 (£22.4m in 2022); 6.9m in Guernsey (£7.5m in 2022) and £14.7m in Jersey (£14.9m in 2022).

Figure 14 – 2023 contributions by type of taxation



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

Capital investment

Figure 15 shows the levels of capital investment in telecommunications in Guernsey and Jersey in the years 2019 to 2023.

Figure 15 – Capital investment in the telecommunications industry in the Channel Islands, 2019 to 2023

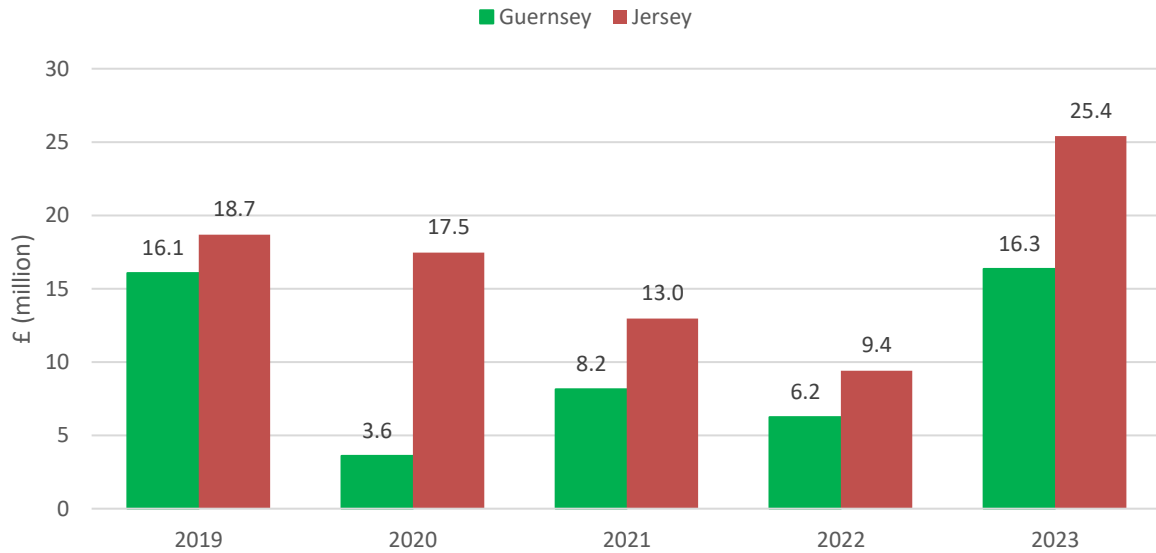


Figure 16 – Percentage of capital investment by type, Guernsey 2023

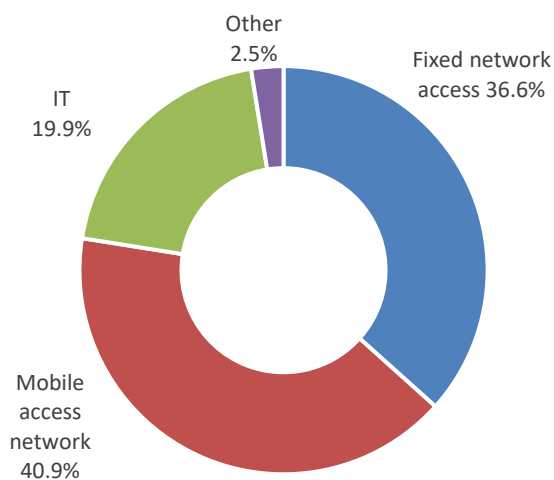
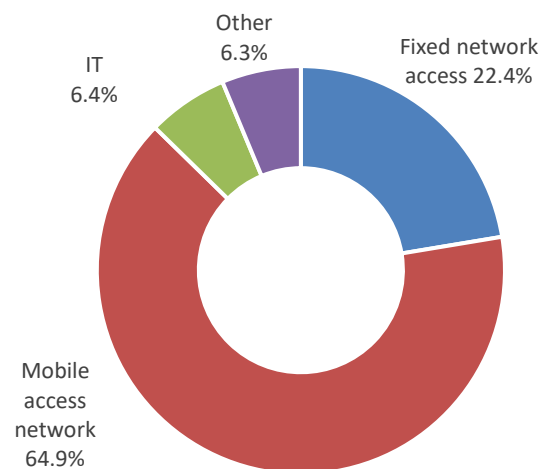


Figure 17 – Percentage of capital investment by type, Jersey 2023



Capital investment expenditure has varied significantly in Guernsey over the years and had been declining in Jersey. Both islands have seen a significant increase in capital investment in 2023, mostly due to a fixed and mobile network transformation project¹¹, increasing by 170% to £25.4m in Jersey, and by 162% to £16.3m in Guernsey.

¹¹ The network transformation project includes modernisation and upgrades for JT's mobile network, CORE, Radio Access Network (RAN), and managed Services networks

Fixed network market

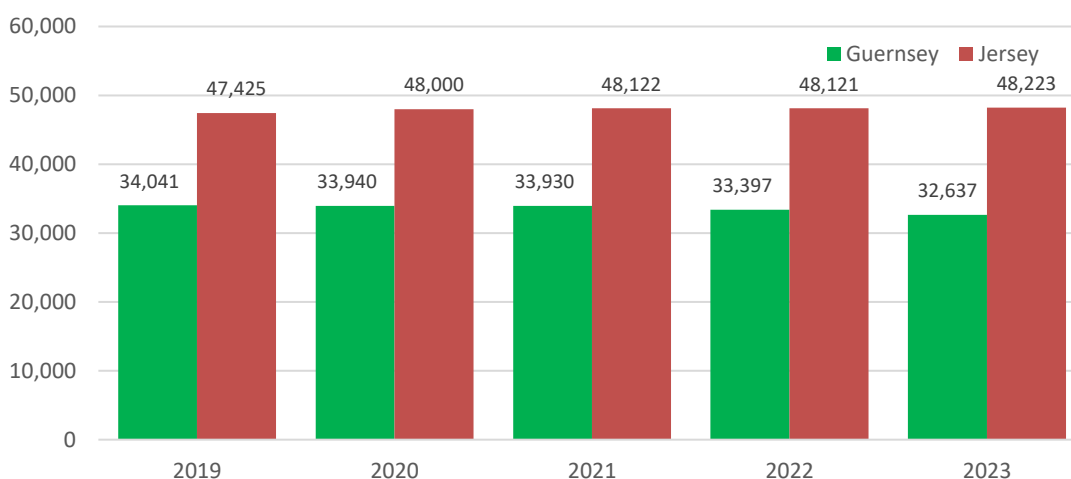
The fixed network market is characterised by consumer equipment that is in a fixed geographic location and used to make/receive voice calls, send/receive faxes and to support broadband and leased line services. In contrast, the consumer equipment in the mobile market is not fixed to a single geographic 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, fixed network broadband, fixed network leased line services and satellite.

Fixed line telephony market

Total number of lines and subscriptions

Figure 18 shows the number of fixed lines in the Islands during the period 2019 to 2023. In 2023, the number of fixed lines and subscriptions remained effectively the same in Jersey (48,223), while in Guernsey they decreased by 2.3% (32,637).

Figure 18 – Number of retail fixed lines and subscriptions in the Channel Islands, 2019 to 2023



In both islands, 97.2% of retail subscriptions were for consumer products,¹² with the remaining 2.8% for 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. These types of internet access are 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 2023. Subscription to WLR and carrier select services have increased in both Islands compared to 2022.

Table 1 – Subscriptions to alternative carriers

	Guernsey	Jersey
Carrier select	9,133	246
Wholesale Line Rental	5,905	12,216
Total	15,038	12,462

Source: Industry questionnaires

¹² In Jersey, all standard landlines offered by the main three operators (JT, Sure and Airtel) are classified as consumer products

Fixed telephony minutes

Figures 19 and 20 show the numbers of minutes carried by operators in Guernsey and Jersey annually between 2019 and 2023. For 2023, 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 since 2020. 2020 showed a small spike in the number of fixed line calls in Guernsey, Jersey and the UK¹³ (possibly an effect of COVID-19 lockdown). Compared to 2022, fixed line call minutes decreased in Guernsey by 17.3% to 36.9 million and in Jersey by 16.5% to 49.9 million.

Figure 19 – Number of fixed line minutes in Guernsey by operator, 2019 to 2023

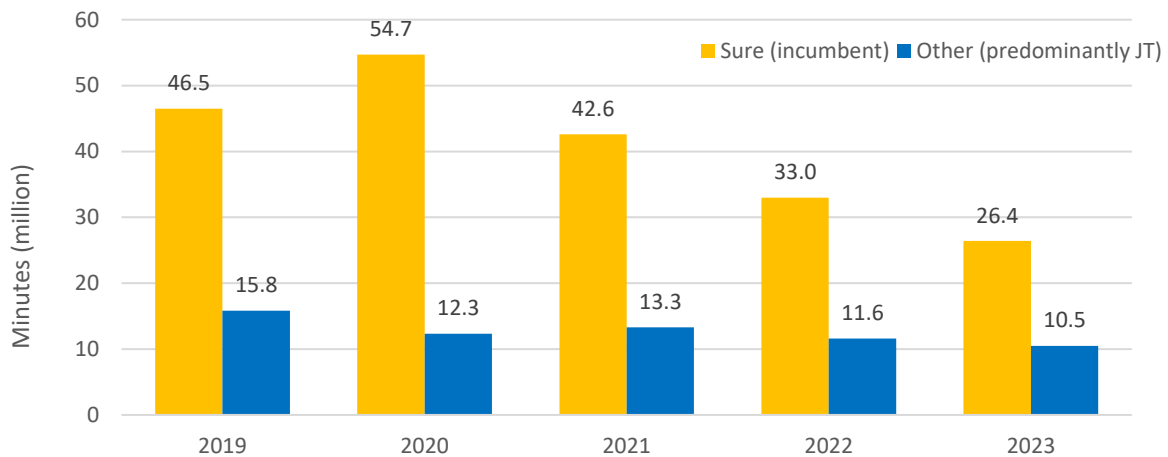
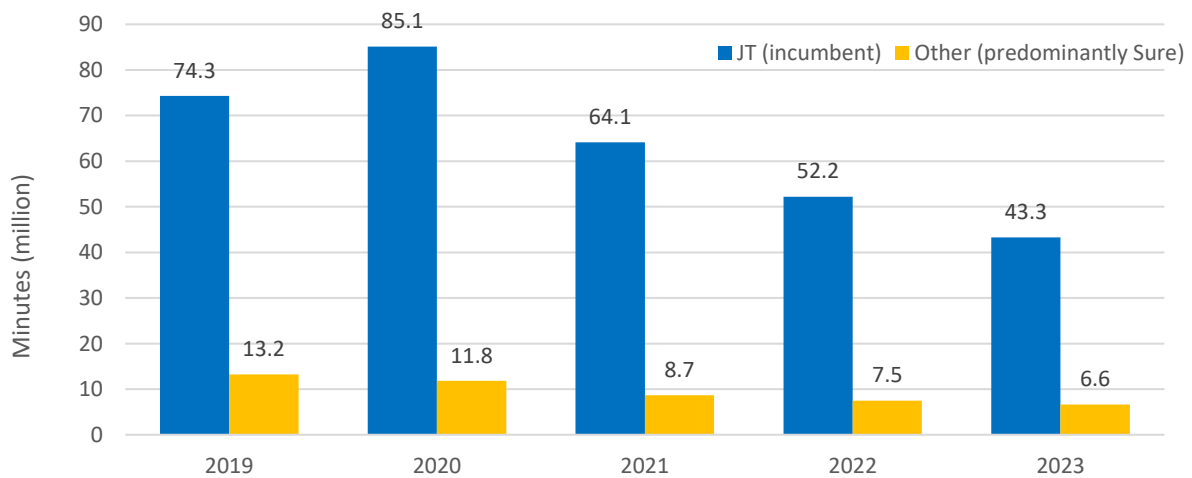


Figure 20 – Number of fixed line minutes in Jersey by operator, 2019 to 2023



¹³ 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.

In 2023, Jersey remained stable while there was a large decrease in fixed line connections in Guernsey following a sudden increase in 2022.

Table 2 – Fixed and wireless fixed retail line connections per 100 inhabitants, 2019 to 2023

	Guernsey	Jersey
2019	54	N/A ¹⁴
2020	54	46
2021	53	47
2022	53 ¹⁵	47
2023	51	47

Revenues

Excluding broadband and leased line services, revenues associated with fixed networks in 2023 were £11.1m in Guernsey (£11.4m in 2022) and £13.4m in Jersey (£13.4m in 2022).

Figures 21 and 22 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 21 – Fixed network revenues Guernsey

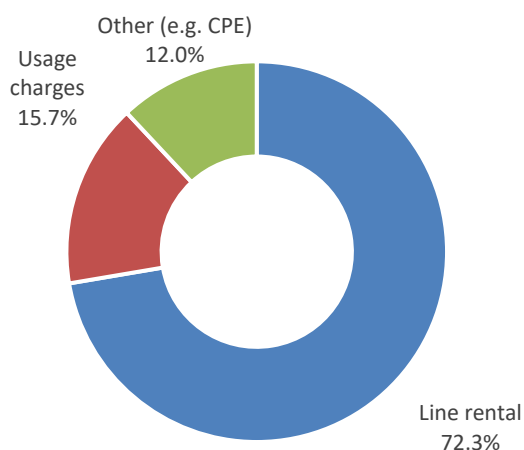
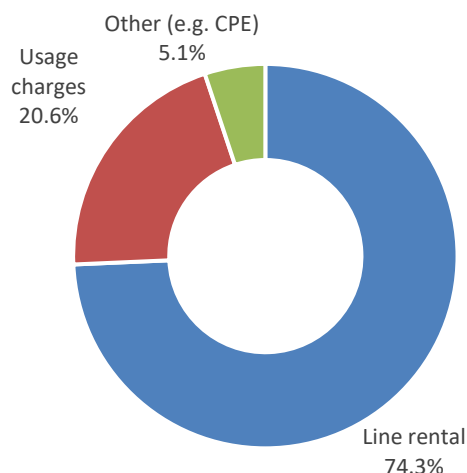


Figure 22 – Fixed network revenues Jersey



Note: 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 2023 was £338.98 (£28.25 per month), showing an increase of 13.4% compared to 2022. Excluding GST, the equivalent annual figure for 2023 in Jersey was £278.91 (£23.24 per month), remaining unchanged since 2022¹⁶. Charges for services such as broadband are in addition to these.

¹⁴ Penetration rates are unable to be provided for Jersey prior to 2020. 2020 to 2022 rates are calculated using the population estimate from the 2021 Census. 2023 penetration rate calculated using the end-of-2022 population estimate from linked administrative data.

¹⁵ Penetration rate for 2022 for Guernsey has been revised since the 2022 report based on updated information

¹⁶ 2022 figures for both Guernsey and Jersey have been revised since the 2022 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 products¹⁷ in Jersey is 6.0%, while in Guernsey it is 4.5%.

Subscriptions and penetration rates

Table 3 shows historic levels in both Islands for fixed broadband subscriptions and overall broadband subscriptions (including mobile substitutions). In 2023, the number of fixed line broadband subscriptions increased by 2.2% to 26,925 in Guernsey and increased by 1.9% to 42,979 in Jersey.

Table 3 – Numbers of fixed broadband subscriptions in the Channel Islands, 2019 to 2023

	Guernsey		Jersey	
	Excluding data only mobile broadband	Including data only mobile broadband	Excluding data only mobile broadband	Including data only mobile broadband
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
2023	26,925	28,666	42,978	47,066

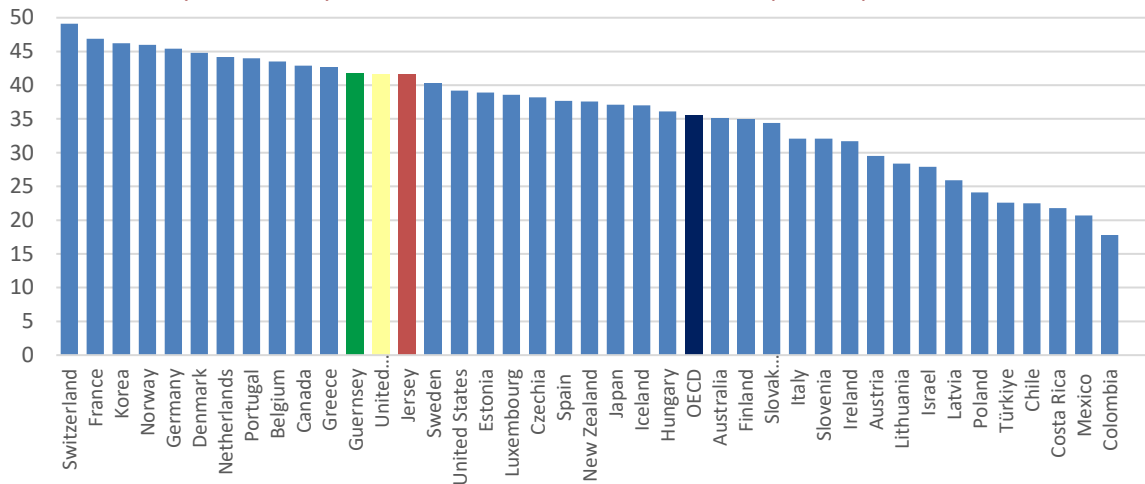
Since 2019, there has been a gradual upward trend in broadband subscriptions in both Islands.

In Jersey, JT provides some subscriptions with capped data allowance: these make up 13.7% of subscriptions in the Island. In Guernsey, all subscriptions have unlimited data allowance.

As illustrated in Figure 23, the Islands have penetration rates higher than OECD average of 35.6 subscriptions per 100 inhabitants. In 2023, Guernsey had 41.8 subscriptions per 100 inhabitants, while Jersey had 41.6. When data-only mobile access is included, penetration rates are 44.5 for Guernsey and 45.6 for Jersey.

¹⁷ These are products targeted at businesses, be it small media enterprises or large corporates

Figure 23 – 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 24 and 25 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.

Figure 24 – Fixed network broadband market share by number of subscriptions – Guernsey

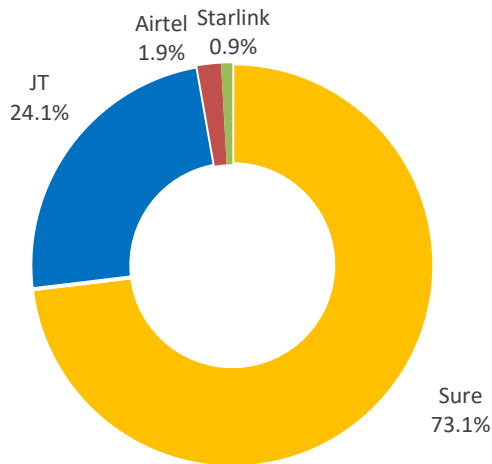
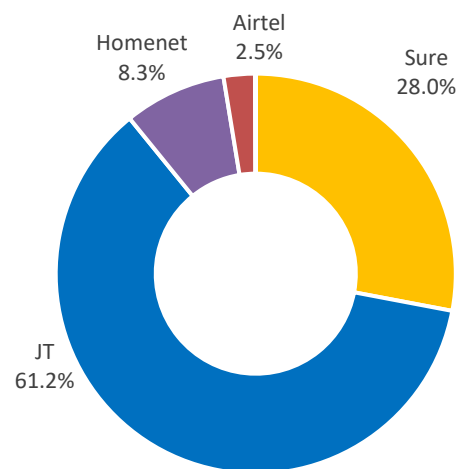


Figure 25 – Fixed network broadband market share by number of subscriptions – Jersey¹⁸



¹⁸ Market share for Starlink was too small to be included in Figure 25

Table 4 shows historic market shares in the fixed broadband market in Guernsey and Jersey between 2019 and 2023.

Table 4 – Fixed broadband market share (%) in Guernsey and Jersey, 2019 to 2023

	Guernsey			Jersey		
	Sure	JT	Other	Sure	JT	Other
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
2023	73	24	3	28	61	11

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

In Jersey, Sure lost 1 percentage points of market share to other operators (Homenet, Airtel and Starlink).

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 download speeds of up to 20Mbps and up to 100Mbps. However, fibre connections have begun to be rolled out across the Island. In Guernsey, Sure owns all the physical lines and JT obtains services through wholesale arrangements but also has some fibre customers. 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. Starlink also provide a small number of services via satellite.

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 of up to 1Gbps. JT owns the majority of the fibre connections, with other licensed operators gaining access to its network through wholesale arrangements. Homenet also provides services up to 1Gbps through its own Fibre to the Home (FTTH) network; and Starlink provides services via satellite.¹⁹

Figures 26 and 27 show the proportions of fixed network broadband subscriptions by download speed on the historically reported basis of ‘up to’ speeds²⁰ 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 26 – Fixed broadband subscriptions by download speed, Guernsey 2023

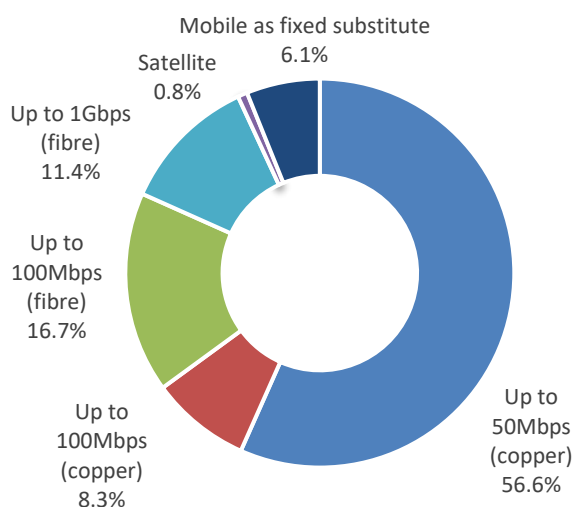
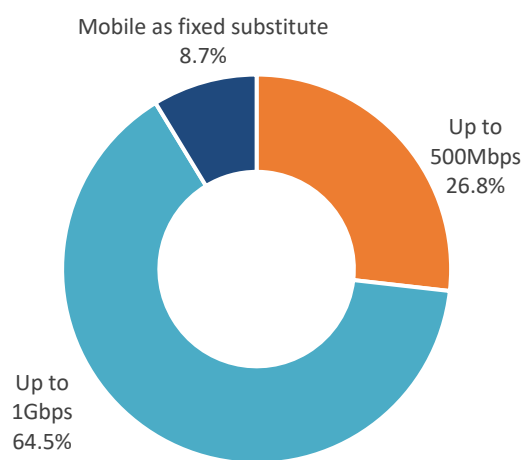


Figure 27 – Fixed broadband subscriptions by download speed, Jersey 2023



The proportion of broadband subscriptions in Jersey with download speeds of up to 500 Mbps and 1 Gbps has increased by 2.3%.

In Guernsey, 81.7% 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.

¹⁹ Context in this paragraph has been corrected following updated information from telecoms providers.

²⁰ The Advertising Standards Agency has changed its guidelines on the reporting of broadband speeds. These classifications are in line with the older framework.

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 2023 by broadband subscribers in Guernsey increased by 15.2% to 115.2 million Gbytes. In Jersey, the volume of data in 2023 increased by 14.2% to 204.1 million Gbytes.

On average, fixed network broadband subscribers (including mobile substitutions) in Guernsey each sent and received an average of 357 Gbytes of data per month in 2023 while subscribers in Jersey each sent and received an average of 396 Gbytes per month. The equivalent figures for 2022 were 316 Gbytes in Guernsey and 353 Gbytes in Jersey, demonstrating an increase (12.7% and 12.1% respectively). Data usage continues to rise, as has been seen in the UK where data usage per subscriber has risen to 535 Gbytes per month in 2023 (up from 482 Gbytes in 2022).²¹

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 2023 from fixed broadband services were £12.0m in Guernsey; up from £10.7m in 2022. Revenues in Jersey in 2023 have increased to £19.6m from £18.2m in 2022.

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. 97.6% of revenues were derived from basic subscriptions and 2.4% 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. 96.0% of revenues in Jersey were derived from basic subscriptions and 4.0% from other sources.

Average revenue per subscription

Estimated²² average revenue per fixed network broadband subscription in Guernsey was £445.10 for the year (£37.09 per month). This shows an increase of 9.4% compared to 2022.

The equivalent 2023 figures in Jersey were £456.14 for the year (£38.01 per month), an increase of 5.7% compared to 2022.

The above figures exclude revenues from associated line rental.

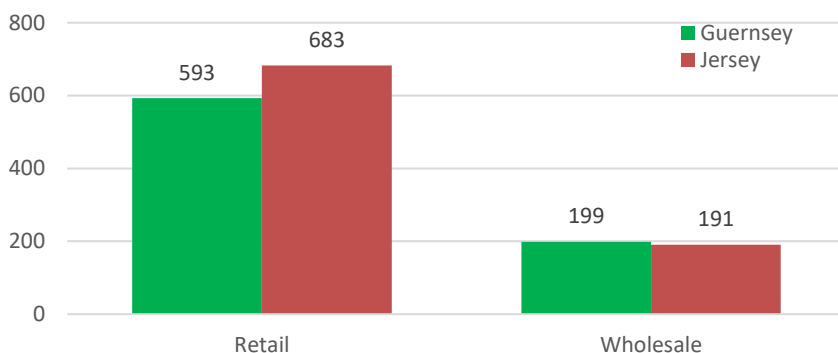
²¹ Ofcom report : Connected Nations 2023 [Connected Nations 2023 - UK report \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/cn2023/cn2023-uk-report/)

²² 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 lines²³ (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 28 – Number of retail and wholesale leased lines in the Channel Islands, 2023²⁴



The number of retail leased lines has decreased in both islands: to 593 from 653 in 2022 in Guernsey, and to 683 from 729 in Jersey. Wholesale leased lines have also decreased in both islands: to 191 from 207 in 2022 in Jersey, and to 199 from 232 in Guernsey.

Table 5 – Numbers of leased lines by usage, 2023

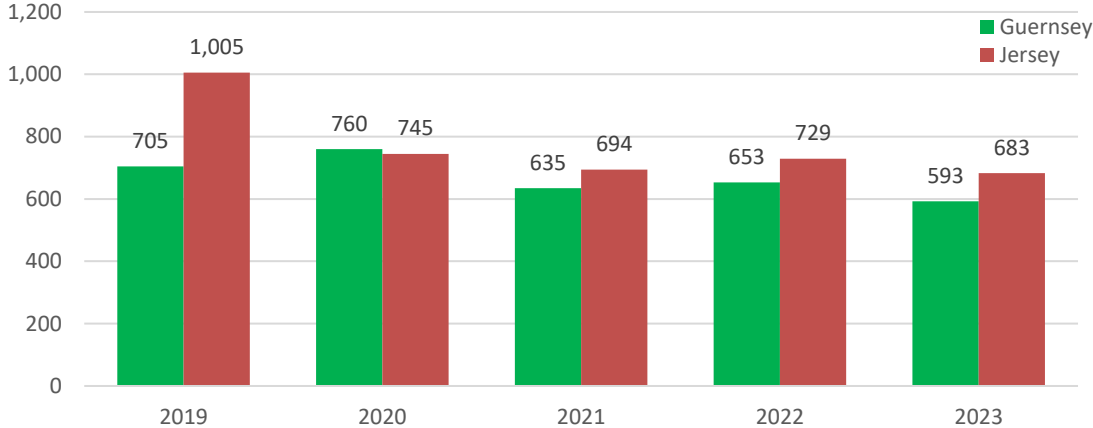
	Guernsey			Jersey		
	On-island	Inter-island	Off-island	On-island	Inter-island	Off-island
Retail	474	31	88	523	28	132
Wholesale	169	1	29	139	0	52

²³ Retail leased lines are those services provided to end users. Wholesale leased lines are those services provided to other communication providers

²⁴ Note, wholesale leased line do not include leased lines used for own/internal use (i.e. self-provisions)

Figure 29 shows the number of retail leased lines in the islands during the period 2019 to 2023.

Figure 29 – Number of retail leased lines in the Channel Islands, 2019 to 2023

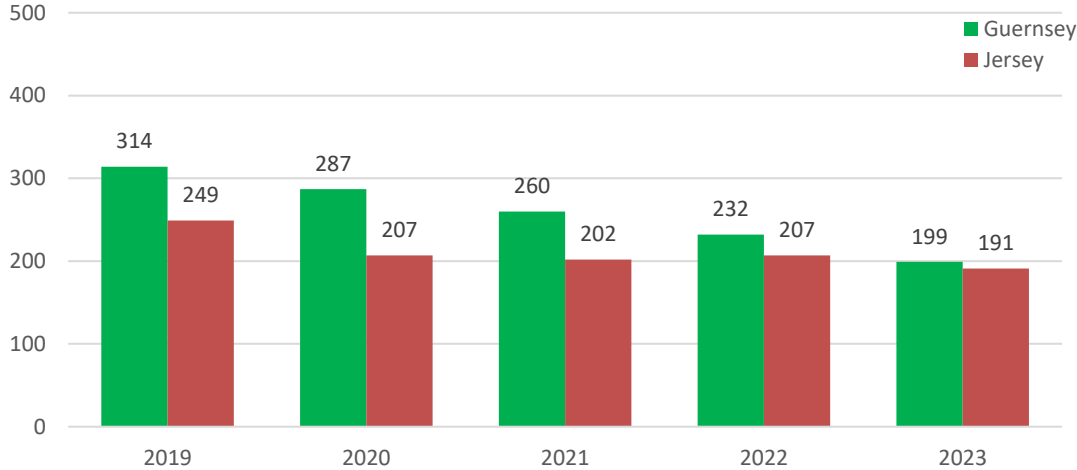


Note: The drop in retail leased lines in Jersey after 2019 is likely due to reporting differences.

The number of lines in both islands decreased in 2023.

Figure 30 shows the number of wholesale leased lines in the islands during the period 2019 to 2023.

Figure 30 – Number of wholesale leased lines in the Channel Islands, 2019 to 2023



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

Market share by numbers of leased line subscriptions

Figures 31 and 32 show the retail market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions. In 2023, JT was the main retail provider in both Islands.

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

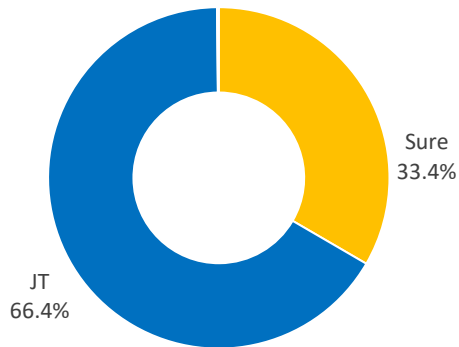
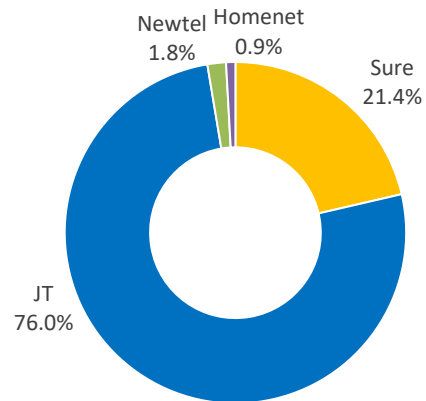


Figure 32 – Retail leased line market share by number of subscriptions – Jersey



Figures 33 and 34 show the wholesale market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions. In 2023, JT was the main wholesale provider in Jersey, while Sure was the main provider in Guernsey.

Figure 33 – Wholesale leased line market share by number of subscriptions – Guernsey

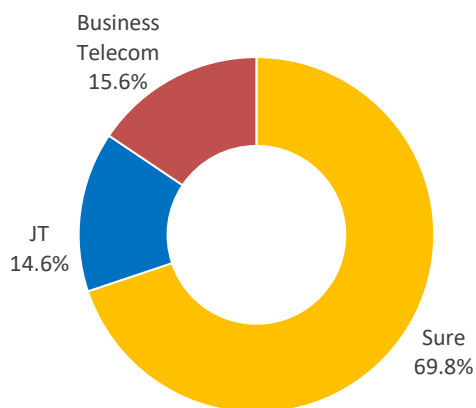
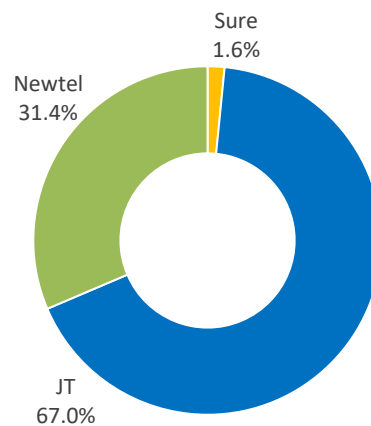


Figure 34 – Wholesale leased line market share by number of subscriptions – Jersey

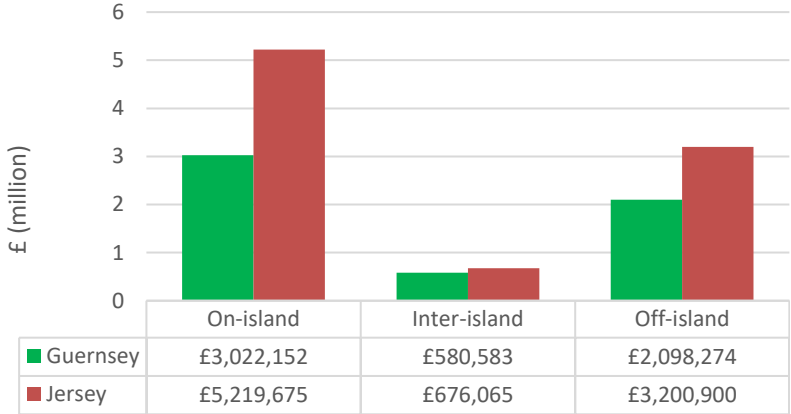


Leased line revenues

Total revenues from retail leased lines in Guernsey in 2023 were £5.7m (£6.6m in 2022), and in Jersey in 2023 were £9.1m (£9.7m in 2022).

Figure 35 shows the breakdown of these totals by on-island, inter-island and off-island services.

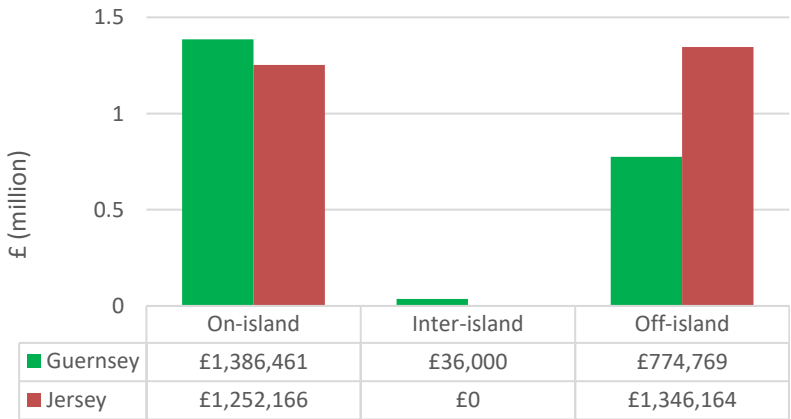
Figure 35 – Revenues from retail leased lines by activity, 2023



Total revenues from wholesale leased lines in Guernsey in 2023 were £2.2m (£2.3m in 2022), and in Jersey in 2023 were £2.6m (£2.9m in 2022).

Figure 36 shows the breakdown of these totals by on-island, inter-island and off-island services.

Figure 36 – Revenues from wholesale leased lines by activity, 2023



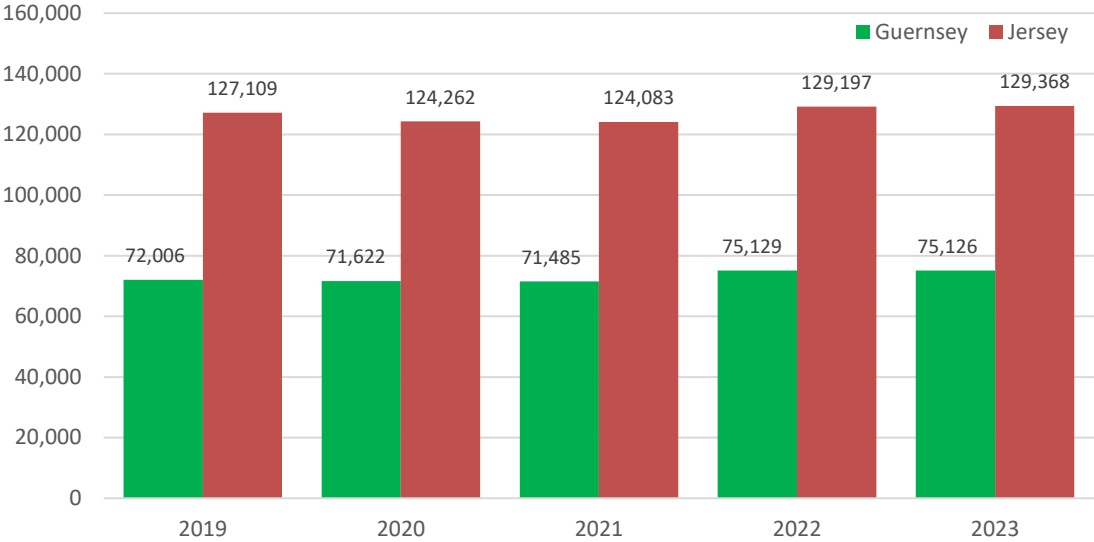
Mobile market

Subscriptions, penetration rates and market shares

In 2023, 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 for data only.

Figure 37 shows the total number of mobile subscriptions in the Islands during the period 2019 to 2023. The figures include pre-paid (i.e. pay as you go) and post-paid (i.e. contract) subscriptions.

Figure 37 – Number of active mobile subscriptions in the Channel Islands, 2019 to 2023



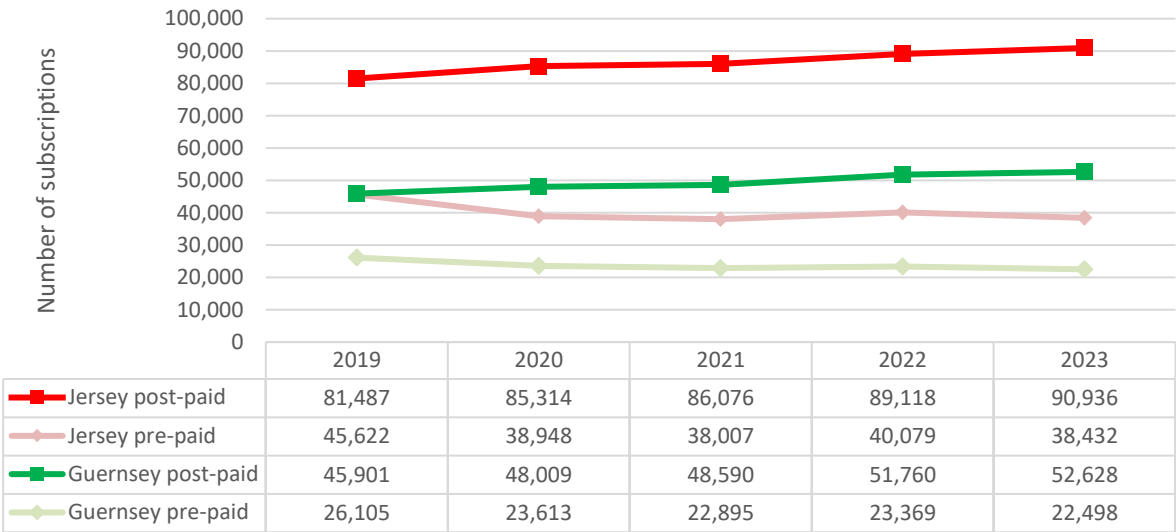
Overall, in 2023 the total number of mobile subscriptions in the Channel Islands was relatively unchanged at 204,494. In 2023, mobile subscriptions remained unchanged in Guernsey at 75,126 and unchanged in Jersey at 129,368.

The upward trend in post-paid subscriptions continued in both Islands in 2023, whilst there was a downward trend in pre-paid subscriptions in both Islands, decreasing by 3.7% in Guernsey and 4.1% in Jersey compared to 2022.

Figure 38 on the next page provides a breakdown of pre-paid and post-paid mobile subscriptions in each Island over the period 2019 to 2023.²⁵

²⁵ 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 arrears paying by direct debit. Figures in this report exclude pre-paid customers that have been deactivated in the last 12 months due to inactivity.

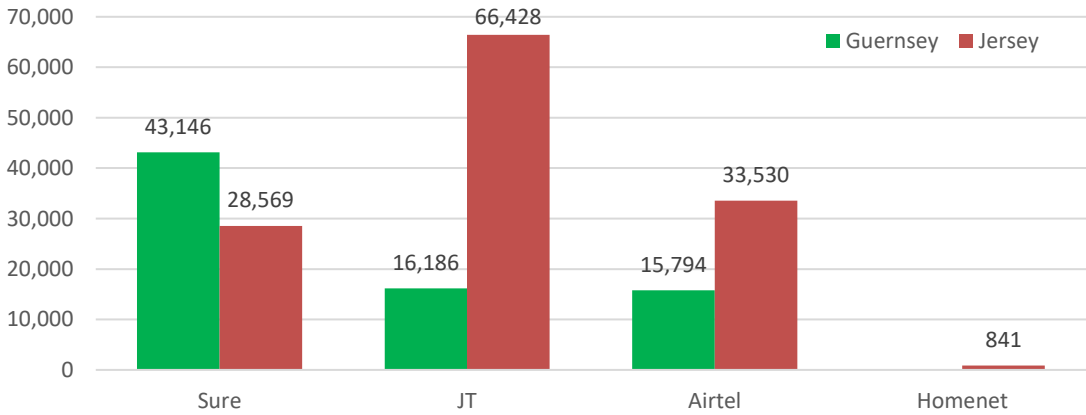
Figure 38 – Pre- and post-paid mobile subscriptions, 2019 to 2023



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 2023 in Guernsey there were 117 active subscriptions per 100 inhabitants, and in Jersey there were 125 subscriptions per 100 inhabitants. These penetration rates in 2023 represent a slight decrease on 2022 in Guernsey and remained stable since 2022 in Jersey.

Figure 39 provides a breakdown of the total number of mobile subscriptions for the 4 mobile operators in the Islands.²⁶

Figure 39 – Number of mobile subscriptions by operator, 2023



Compared to 2022, Sure has seen increased subscriptions in both islands; a 2.2% growth in Guernsey and 0.7% in Jersey, meanwhile JT has seen a decrease in subscriptions in both islands, down 1.4% in Jersey and Guernsey. Airtel has seen a 3.0% growth in Jersey, whilst having a 4.4% reduction in Guernsey. Homenet’s subscriptions have continued to decline by 5.7%.

²⁶ All mobile operators report “Active Subscribers” based on a 90-day cycle period.

Figures 40 and 41 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 40 – Mobile market share by number of subscriptions – Guernsey

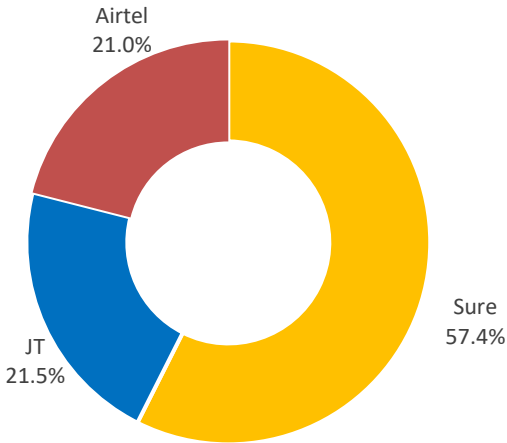


Figure 41 – Mobile market share by number of subscriptions – Jersey

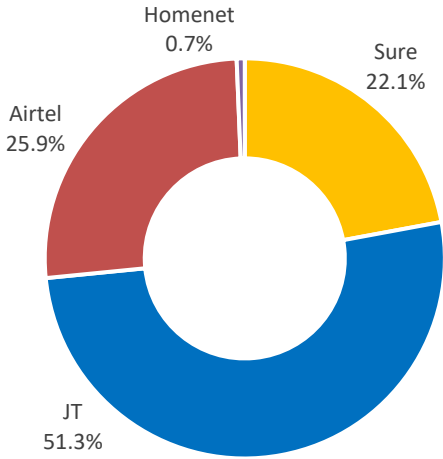


Table 6 shows the market shares of each operator in Guernsey and Jersey respectively between 2019 and 2023.

Table 6 – Mobile market share (%) of subscriptions in Guernsey and Jersey, 2019 to 2023

	Guernsey			Jersey			
	Sure	JT	Airtel	Sure	JT	Airtel	Homenet
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
2023	57	22	21	22	51	26	1

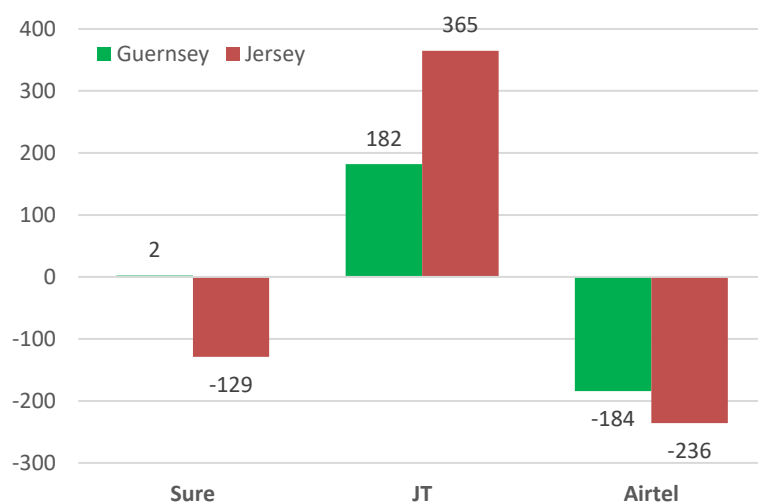
In Guernsey, the incumbent operator Sure gained 1% market share in 2023 from Airtel, reversing the decrease seen in 2022. In Jersey, the incumbent JT lost 1% market share to Airtel since 2022.

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 42, the net change in subscribers is shown, calculated by subtracting the number of subscribers ‘porting-out’ from the number ‘porting-in’.

Figure 42 – Net number of consumers switching mobile service provider, 2023



Source: Porting XS MNP Channel Islands data 2023

In Jersey in 2023, Sure made a net loss of mobile consumers to JT, but made a net gain of subscribers from Airtel. In Guernsey, Sure made a net gain of subscribers from Airtel, but made a net loss of subscribers to JT.

Table 7 – Mobile number porting activity in Guernsey and Jersey, 2023

	Guernsey			Jersey		
	Sure	JT	Airtel	Sure	JT	Airtel
Port in	620	604	312	645	1,066	500
Port out	618	422	496	774	701	736
Net benefit	2	182	-184	-129	365	-236

Source: Porting XS MNP Channel Islands data 2023

Table 8 shows the percentage of registered mobile numbers that switched service provider in Guernsey and Jersey from 2019 to 2023. In Guernsey 2.0% of registered mobile numbers switched or “ported” between service providers in 2023, whilst in Jersey the figure was 1.7%. Porting activity remains at a level below that in the UK, where 10% of the active subscriber base ported in 2015.^{27 28}

²⁷ https://www.ofcom.org.uk/data/assets/pdf_file/0023/38543/annex.pdf Page 38

²⁸ 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, 2019 to 2023²⁹

% of mobile subscribers switching provider	2019	2020	2021	2022	2023
Guernsey	2.5	2.3	2.8	1.8	2.0
Jersey	2.5	2.0	1.9	1.7	1.7

Source: Porting XS MNP Channel Islands data 2019 to 2023 and Industry questionnaires

1,536 mobile subscribers in Guernsey switched or “ported” between service providers in 2023. In Jersey, the equivalent figure was 2,211.

In 2023, the number of working days required to complete a successful port from one service provider to another was at 1.1 working days in Guernsey and 1.2 working days in Jersey.³⁰ The European Commission’s Universal Service Directive requires operators to provide porting within 1 working day.³¹

Table 9 – Average porting time in Guernsey and Jersey, 2016 to 2023

Average porting time (working days)	2019	2020	2021	2022	2023
Guernsey	1.2	1.1	1.3	1.4	1.1
Jersey	1.2	1.1	1.1	1.4	1.2

Average porting times in Guernsey decreased to 1.1 working days in 2023 from 1.4 working days in 2022. Average porting times in Jersey also decreased to 1.2 working days in 2023, down from 1.4 days in 2022.

²⁹ 2021 & 2022 figures for both Guernsey and Jersey have been revised since the 2022 report based on updated information

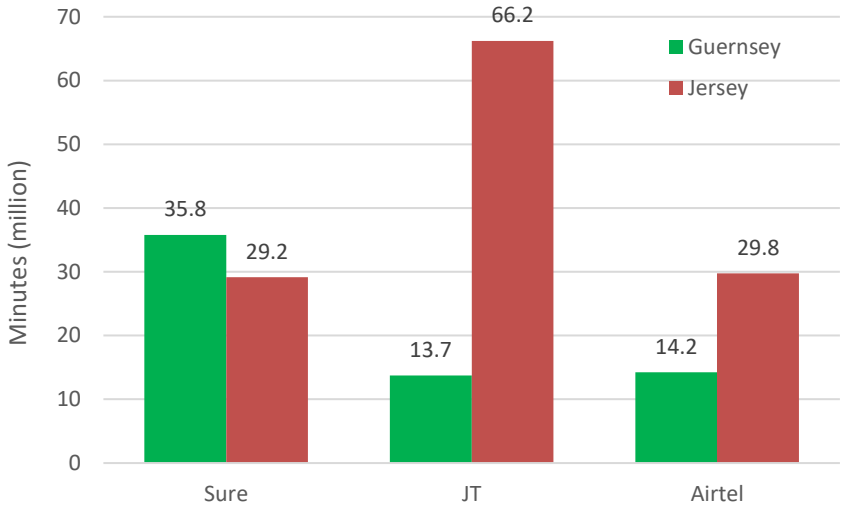
³⁰ Figures provided to the JCRA and GCRA by Porting XS

³¹ <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32002L0022&from=en>

Voice traffic - numbers of minutes

Figure 43 shows the number of mobile voice minutes originating on each operator’s network in each Island in 2023. 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 43 – Total number of mobile minutes originating on CI mobile networks, 2023



The total number of mobile minutes has decreased by 12.9% in Guernsey to 63.7 million in 2023 and has decreased by 12.3% in Jersey to 125.1 million.

Table 10 shows the average number of mobile voice minutes in 2023 for pre-paid and post-paid subscriptions. On the assumption that out-roaming minutes are overwhelmingly associated with post-paid subscribers, all out-roaming voice minutes have been assigned to post paid subscribers. 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, 2023

	Guernsey	Jersey
Minutes per pre-paid subscriber	354	442
Minutes per post-paid subscriber	924	1,042

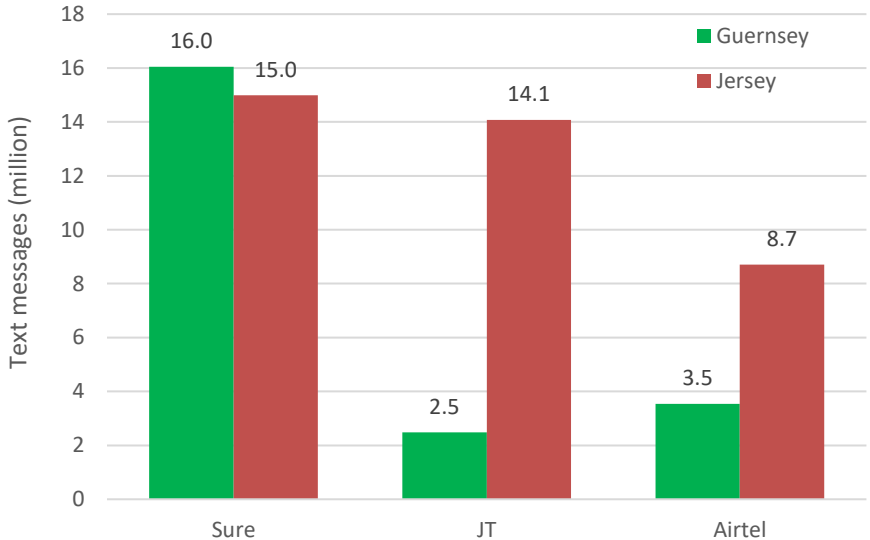
Source: Industry questionnaires

Compared to 2022, in Guernsey the number of minutes per pre-paid and post-paid subscriber have decreased by 11.9% and 11.4% respectively. In Jersey, minutes per pre-paid subscriber have decreased by 11.9% and minutes per post-paid subscriber have decreased by 12.9%.

SMS traffic – numbers of messages

Figure 44 shows the number of SMS text messages originating on each operator’s network in each Island in 2023. These include SMS messages associated with in-roaming activities.

Figure 44 – Total number of SMS text messages originating on CI mobile networks, 2023



Overall, text volumes have continued to fall in both Islands. In Guernsey, the number of messages decreased by 12.9% to 22.1 million; in Jersey the number of messages also decreased by 15.9% to 37.8 million.

Table 11 shows the average number of SMS text messages sent in 2023 for pre-paid and post-paid subscriptions. On the assumption that out-roaming text messages are overwhelmingly associated with post-paid subscribers, all out-roaming text messages have been assigned to post paid subscribers.

Table 11 – Average SMS text messages per pre-paid and post-paid subscription, 2023

	Guernsey	Jersey
SMS messages per pre-paid subscriber	130	136
SMS messages per post-paid subscriber	200	254

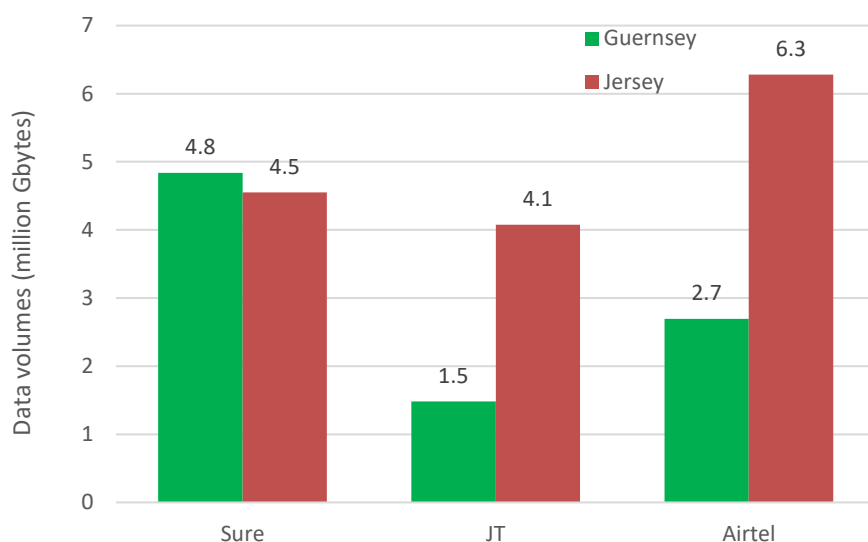
Source: Industry questionnaires

Compared to 2022, in Guernsey the number of SMS messages per pre-paid subscriber decreased by 16.2% and the number of SMS messages per post-paid subscriber decreased by 16.5%. In Jersey, the number of SMS messages per pre-paid subscriber decreased by 15.0% and the number of SMS messages per post-paid subscriber decreased by 17.5%.

Mobile data

Figure 45 shows the volume of data (in Gbytes) sent and received over each operator’s network in each Island in 2023. These include data associated with pre-paid and post-paid mobile sims and in-roaming activities.

Figure 45 – Mobile data volumes (million Gbytes) sent and received on CI mobile networks, 2023



Overall, data volumes have continued to increase in both Islands. In Guernsey, the volume of data increased by 10.6% to 9.0 million Gbytes, and in Jersey the volume of data increased by 34.3% to 14.9 million Gbytes.

Table 12 shows the average data volume (in Gbytes) consumed in 2023 per Guernsey and Jersey pre-paid and post-paid subscription. On the assumption that out-roaming data activities are overwhelmingly associated with post-paid subscribers, all out-roaming data activities have been assigned to post paid subscribers.

Table 12 – Average data volumes sent and received per pre-paid and post-paid subscription, 2023

	Guernsey	Jersey
Gbytes of data per pre-paid subscriber	105.29	94.25
Gbytes of data per post-paid subscriber	114.68	112.28

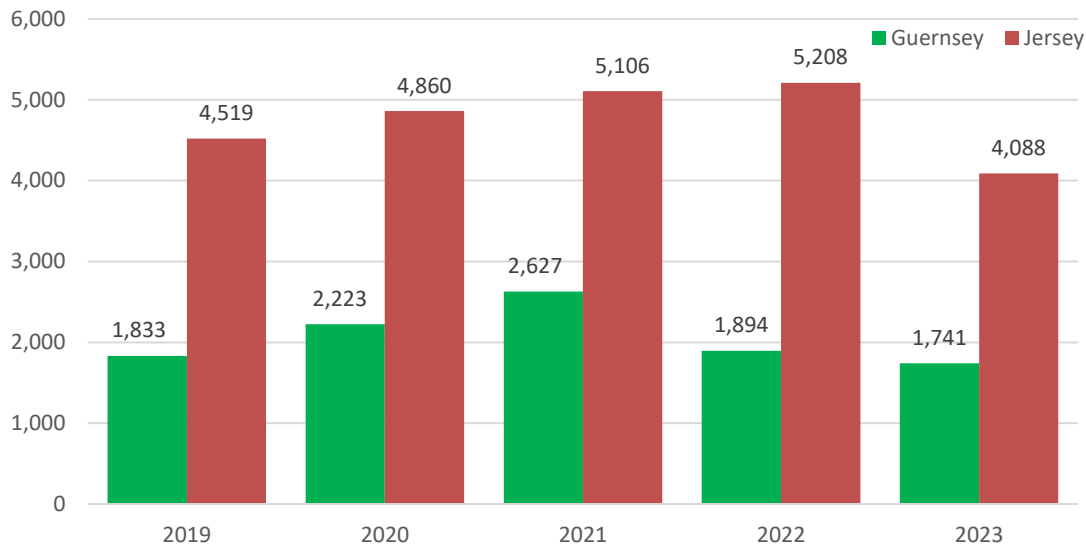
Compared to 2022, in Guernsey the volume of data per pre-paid subscriber increased by 17.2% and the volume of data per post-paid subscriber increased by 7.3%. In Jersey, the volume of data per pre-paid subscriber increased by 29.6% and the volume of data per post-paid subscriber increased by 37.8%.

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 46 – Number of data only subscriptions, 2019 to 2023

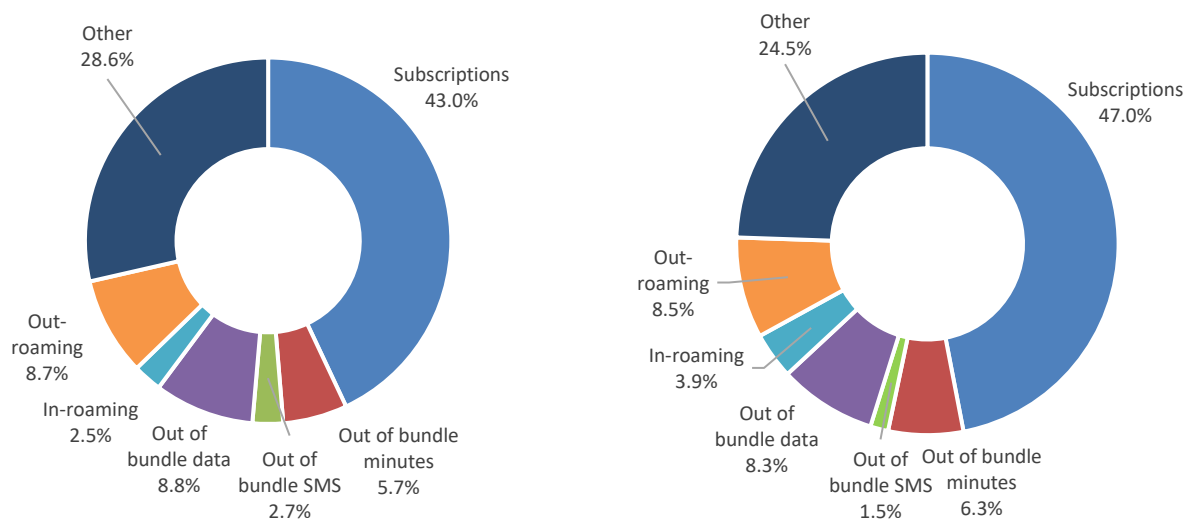


In 2023, there were 1,741 mobile subscriptions for data only in Guernsey, representing a decrease of 8.1%. In Jersey, there were 4,088 mobile subscriptions for data only, representing a decrease of 21.5%.

Mobile revenue

Total revenues from mobile related activities in Guernsey in 2023 were £20.3m and in Jersey £36.1m. Revenue has increased in both Islands compared to 2022 (Guernsey increased by 1.6%, Jersey by 5.1%).³² Figures 47 and 48 provide a breakdown of the sources of mobile revenues.

Figure 47 – Sources of mobile revenue in Guernsey Figure 48 – 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, 2023

		Guernsey	Jersey
Pre-paid	During 2023	£125.74	£124.52
	Ave per month	£10.48	£10.38
Post-paid	During 2023	£246.22	£272.31
	Ave per month	£20.52	£22.69

In Guernsey, the spend per pre-paid subscriber has increased by 2.4% compared to 2022, and the spend per post-paid subscriber has increased by 2.3%. In Jersey, the spend per pre-paid subscriber increased by 5.7% compared to 2022, and the spend per post-paid subscriber increased by 4.1%.³³

³² 2022 figures for Jersey have been revised since the 2022 report based on updated information

³³ 2022 mobile revenues have been revised for both Jersey and Guernsey since the 2022 report based on updated information

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, 2023

	Guernsey	Jersey
Minutes	1,642,992	4,187,673
SMS texts	435,375	864,145
Data (Gbytes)	49,564	208,194

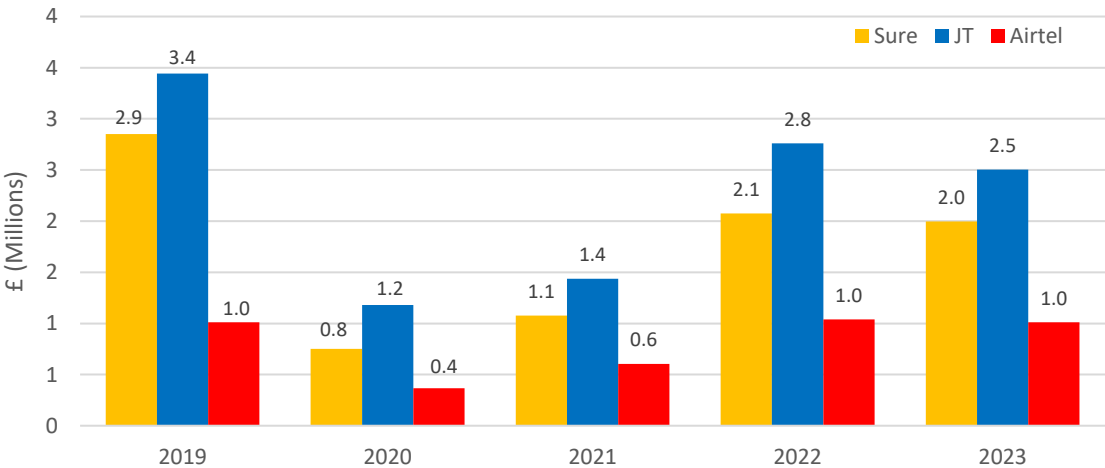
Out-roaming call minutes showed a small percentage reduction in 2023 compared to 2022; down 7.6% in Guernsey and 2.7% in Jersey. Out-roaming SMS text traffic showed a more substantial reduction in both jurisdictions: down 21.5% in Guernsey and 28.7% in Jersey. However, out-roaming data usage showed large increases in both Guernsey (up 52.2%) and Jersey (up 62.4%).

Out-roaming revenues

In 2023, operators in the Channel Islands generated total revenues of £5.5m from out-roaming activities (compared to £5.9m in 2022): 10.2% of total mobile revenue (excluding in-roaming revenues).

Figure 49 shows total out-roaming revenues in the period 2019 to 2023, combining Guernsey and Jersey. Out-roaming revenues for the Channel Islands have decreased 6.1% since 2022.

Figure 49 – Total out-roaming revenues in the Channel Islands, 2019 to 2023



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, 2023

	Guernsey	Jersey
Minutes	8,778,011	17,614,422
SMS texts	9,291,705	10,633,326
Data (Gbytes)	613,867	1,281,180

In-roaming call minutes showed a decrease in both islands in 2023 compared to 2022, decreasing by 24.3% in Guernsey and 13.2% in Jersey. In-roaming SMS texts also showed a decrease in 2023, decreasing by 5.9% in Guernsey and 13.4% in Jersey. However, in-roaming data usage showed large increases in both Jersey (21.9%) and Guernsey (20.8%).

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

History of 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.

Inhabitants

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

Guernsey	64,421 estimated on 30 th June 2023
Jersey	103,200 estimated on 31 st December 2022

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

24 June 2024

Appendix

Off-Island links

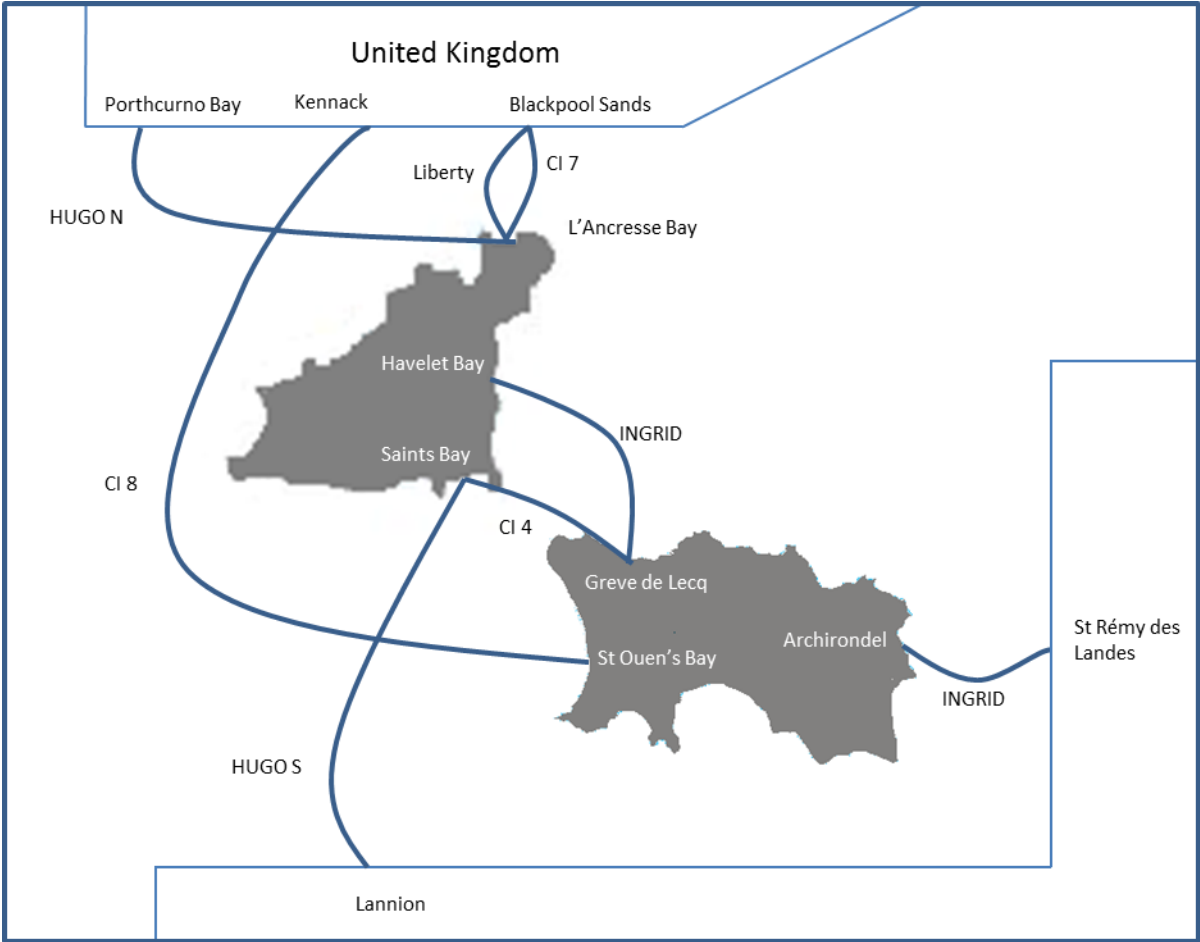
Off-island links are an important part of the telecoms infrastructure for Guernsey and Jersey, ensuring connectivity with the UK and Europe, and wider world. As part of this report the status of the off-island links is monitored and reported on to help ensure transparency about this important area.

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 50 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 50 – 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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	70.3	69.0	64.1	61.4	61.6	63.1	69.6	71.2	75.3
Jersey	98.2	97.8	101.9	101.2	105.9	104.1	107.8	107.2	112.6
Channel Islands	168.5	166.8	166.0	162.6	167.5	167.2	177.4	178.4	188.0

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	236	227	227	222	212	211	209	224	234
Jersey	433	505	506	554	592	583	545	537	506
Channel Islands	669	732	733	776	804	794	754	761	740

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	22.5	10.0	4.9	5.2	16.1	3.6	8.2	6.2	16.3
Jersey	21.3	22.6	23.3	19.6	18.7	17.5	13.1	9.4	25.4
Channel Islands	43.8	32.6	28.2	24.8	34.7	21.1	21.3	15.6	41.7

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	36.5	36.6	36.0	35.7	34.0	33.9	33.9	33.4	32.6
Jersey	55.9	58.3	55.9	47.9	47.4	48.0	48.1	48.1	48.2
Channel Islands	92.5	95.0	91.9	83.6	81.5	81.9	82.1	81.5	80.9

Table A5 – Number of fixed line minutes, millions

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	73.6	72.1	70.2	68.2	62.3	67.0	54.9	44.7	36.9
Jersey	128.7	120.1	110.8	99.0	87.4	96.9	72.8	59.7	49.9
Channel Islands	202.3	192.2	181.0	167.2	149.8	163.9	128.7	104.4	86.8

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	23.8	23.2	24.0	24.4	24.9	25.3	25.9	26.3	26.9
Jersey	36.1	35.9	37.2	37.9	38.4	39.7	40.7	42.2	43.0
Channel Islands	59.9	59.1	61.2	62.3	63.3	65.0	66.6	68.5	69.9

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	2023
Guernsey	24.6	24.6	25.5	26.8	26.7	27.6	28.5	28.2	28.7
Jersey	37.9	39.2	41.2	43.6	42.9	43.5	45.8	47.4	47.1
Channel Islands	62.4	63.8	66.7	70.3	69.6	71.1	74.3	75.6	75.7

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	571	575	642	622	705	760	635	653	593
Jersey	1030	1061	1017	937	1005	745	694	729	683
Channel Islands	1601	1636	1659	1559	1710	1505	1329	1382	1276

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

	2018	2019	2020	2021	2022	2023
Guernsey	281	314	287	260	232	199
Jersey	306	249	207	202	207	191
Channel Islands	587	563	494	462	439	390

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	71.2	71.2	68.8	71.3	72.0	71.6	71.5	75.1	75.1
Jersey	122.7	121.8	120.9	125.9	127.1	124.3	124.1	129.2	129.4
Channel Islands	193.9	192.9	189.7	197.2	199.1	195.9	195.6	204.3	204.5

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	30.8	29.5	26.4	26.3	26.1	23.6	22.9	23.4	22.5
Jersey	53.8	49.6	46.5	47.1	45.6	38.9	38.0	40.1	38.4
Channel Islands	84.7	79.2	72.9	73.4	71.7	62.6	60.9	63.4	60.9

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	40.4	41.7	42.4	45.0	45.9	48.0	48.6	51.8	52.6
Jersey	68.8	72.1	74.4	78.8	81.5	85.3	86.1	89.1	90.9
Channel Islands	109.2	113.8	116.8	123.8	127.4	133.3	134.7	140.9	143.6

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

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Guernsey	1.9	1.6	2.8	2.8	2.5	2.3	2.8	1.8	2.0
Jersey	3.4	2.4	3.7	3.1	2.5	2.0	2.0	1.9	1.7