



## NEWS RELEASE

27 June 2023

### **Telecoms sector remained steady and healthy in 2022**

**Jersey's telecoms market is healthy, with robust connectivity and consumers having a choice of several different suppliers, according to the latest independent research carried out by Statistics Jersey<sup>1</sup>.**

The Telecommunications Statistics and Market Report 2022 (the Report) is compiled on behalf of the Guernsey Competition & Regulatory Authority (GCRA) and the Jersey Competition Regulatory Authority (JCRA). It shows a comprehensive breakdown of the telecommunications market in both Bailiwicks, including detailed analysis of specific networks such as fixed line broadband, the mobile market, and an overview of off-Island links.

Jersey's telecoms sector is well regulated, enjoys a healthy level of competition and has seen and will continue to see technological innovation and investment in infrastructure.

**Claire Kybett, Finance and Case Officer** at the JCRA says, "This report is an important element of our research and monitoring of the telecommunications sector in Jersey, and provides a detailed picture of how the market is performing. It also helps us to understand developments in products, services, and infrastructure as well as market behaviours – how people are buying and using their telecoms products and services, be it fixed line, broadband or mobile.

This data feeds into our long term workstreams in this sector, as outlined in our Strategic and Business Plans."

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<sup>1</sup> Executive Summary attached in Annex A

The Report is based on data supplied by licensed telecoms operators in the Channel Islands and details, among other information, year on year changes in consumer spending and usage in the market, financial turnover, economic value, and employment.

“There is some interesting data in the Report,” continues Claire Kybett. “For example, the preference for ‘bundled products’ among consumers, where they choose a supplier based on a range of different products and services for a single monthly cost. This is an area we are exploring in more detail to understand how these deals are structured and to identify how they contribute to competition in the marketplace.”

The full 42 page report is available on the [Statistics Jersey](#) and [JCRA websites](#).

## **Ends**

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## **NOTES TO EDITORS:**

The data used to compile this report has been provided by the Channel Islands’ licensed telecoms operators using an agreed set of data definitions. The accuracy of the data is the sole responsibility of the operators. Statistics Jersey has not audited the data, although it has compared the 2022 submissions with the previous year and provided the operators with the opportunity to review their data and to make adjustments where they feel necessary.

## **About The Jersey Competition Regulatory Authority:**

The JCRA was established under the Competition Regulatory Authority (Jersey) Law, 2001. It is responsible for administering and enforcing the Competition (Jersey) Law 2005 and also regulates the telecoms and postal sectors and the Ports of Jersey.

The JCRA strives to ensure that the markets work well for the benefit of all stakeholders, including Government, business, citizens and consumers facilitating best value, choice and access to high quality services.

## Annex A – Executive Summary

### Introduction

[The Telecoms Statistics & Market Report 2022](#) 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 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.

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.