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Telecommunications Statistics

and

Market Report 2021

GUERNSEY COMPETITION & REGULATORY AUTHORITY

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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 2021 and is based primarily on data submitted by the licensed telecommunications operators during the first half of 2022. All currency numbers in this report are presented in nominal terms and have not been adjusted to account for inflation unless stated otherwise.

This report for 2021 should be considered in the context of the ongoing impacts of the COVID-19 pandemic and resultant measures taken by governments to reduce infection levels. In particular, usage of telecoms services will have been affected by increased home working; technology solutions to enable continued communication such as internet-based meetings; and fewer travellers both inbound and outbound.

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 7.2% in 2021 to £93.46 in Guernsey, and by 1.6% to £91.06 in Jersey
- Total **turnover** increased in Guernsey by 10.3% to £69.6m in 2021. Total turnover in Jersey increased by 6.1% to £107.8m
- In 2021, both Islands showed a decline in the number of **fixed call network minutes** (Guernsey by 16.6% and Jersey by 24.9%), back to pre-COVID-19 levels following an increase in 2020.
- **Employment** within the telecommunication sector again remained fairly constant in Guernsey, with 209 full-time equivalent staff in 2021, however employment in Jersey has reduced by 6.5% since 2020 to 545 full-time equivalent staff
- **Broadband penetration rates** in both Islands were higher than the OECD average (33.8) but below the UK (41.0): Guernsey had 40.7 subscriptions per 100 inhabitants and Jersey 39.4
- **Data usage** in both Islands remains below the UK average (453 Gbytes per month): Guernsey subscribers used on average 300 Gbytes per month (up 18.7% on 2020); in Jersey this figure is 349 Gbytes per month (up 17.1% on 2020)
- Meanwhile, **text volumes** have continued to fall slightly in both Islands, decreasing by 3.8% in both Guernsey and in Jersey
- The total **number of mobile call minutes** decreased by 6.3% in Guernsey in 2021 and 11.8% in Jersey
- **Mobile data volumes** increased by 25.2% in Guernsey and 4.6% in Jersey
- Total **mobile revenue** has increased in both Islands since 2020: 2.9% in Guernsey and 3.4% in Jersey

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

Statistics Jersey

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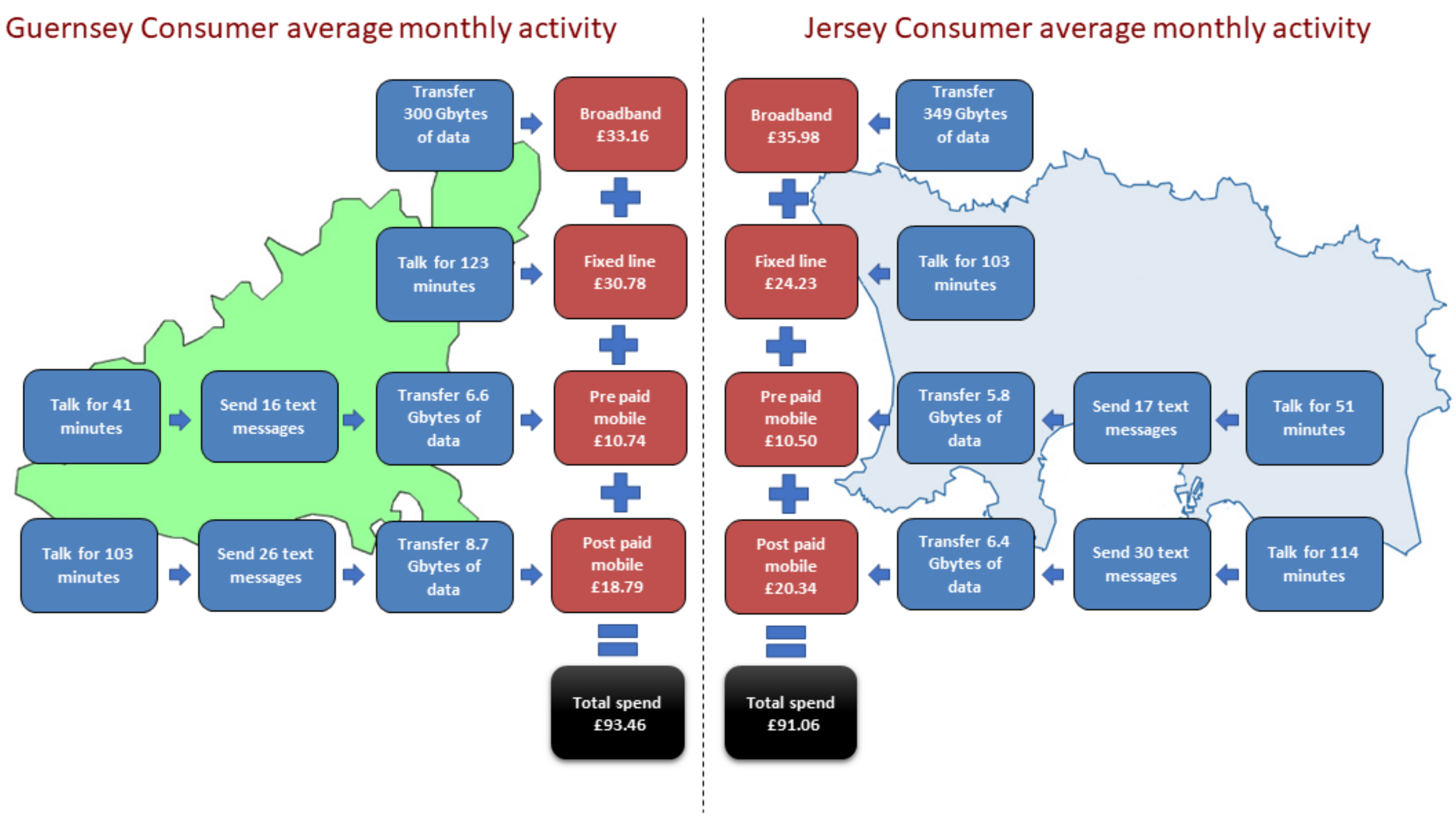
Consumer snapshot in 2021

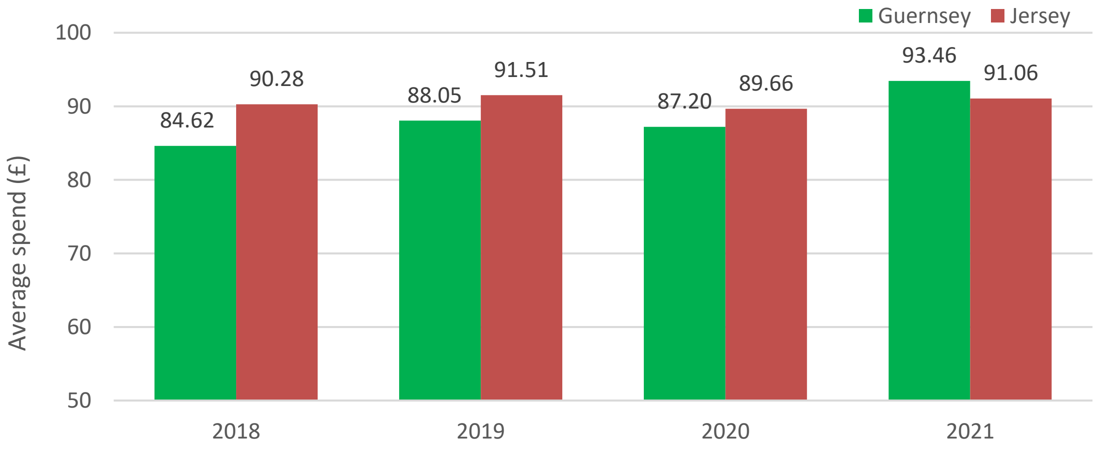


Average monthly consumer spend on telecoms services

Average monthly spend by consumers on telecoms services in the Channel Islands was £92.19 in 2021; up from £88.85 in 2020. This includes expenditure on broadband, fixed line, pre-paid and post-paid mobile services.

As shown in Figure 1, average monthly spend in Guernsey increased by 7.2% to £93.46 in 2021 compared to 2020, while average monthly spend increased by 1.6% in Jersey to £91.06.

Figure 1 – Average consumer spend on telecoms services in the Channel Islands, 2018 to 2021

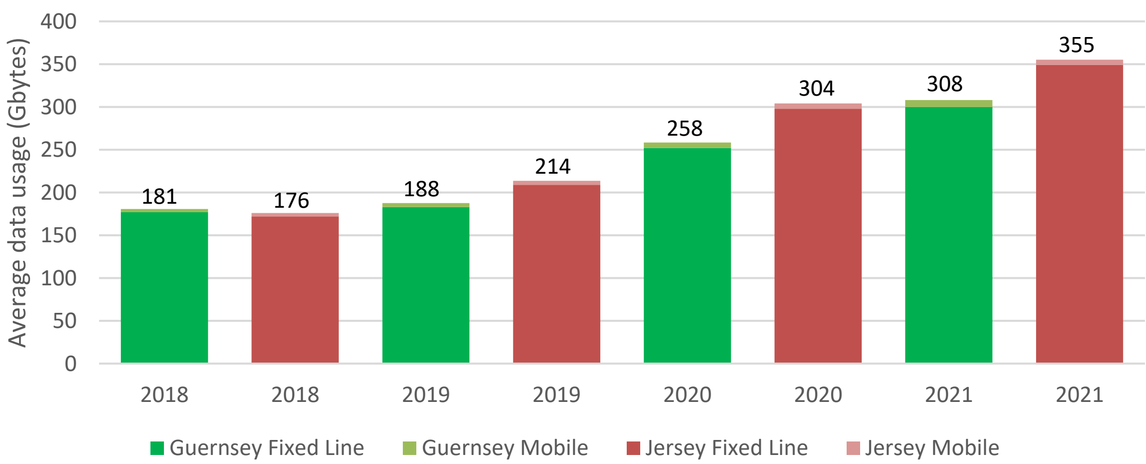


Consumer data usage

Average monthly data usage by consumers in the Channel Islands was 330 Gbytes in 2021; up from 280 Gbytes in 2020.

As shown in Figure 2, average data usage increased in Guernsey by 18.8% to 308 Gbytes in 2021 compared to 2020. This was made up of 8 Gbytes of mobile data and 300 Gbytes of fixed line broadband data. In Jersey, average data usage increased by 16.8% to 355 Gbytes; this was made up of 6 Gbytes of mobile data and 349 Gbytes of fixed line broadband data.

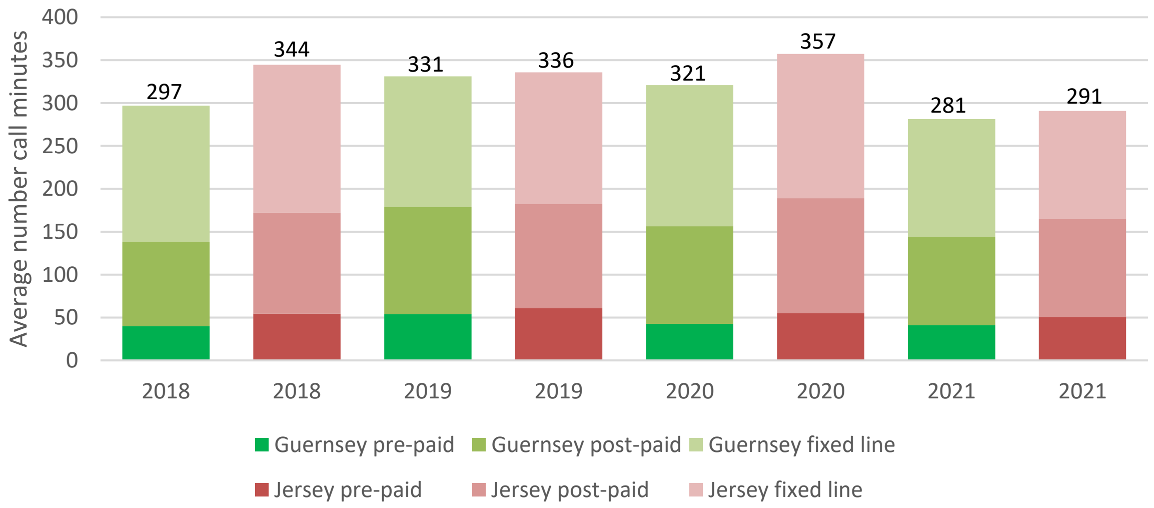
Figure 2 – Average data usage in the Channel Islands, 2018 - 2021



Consumer data voice and message use

In 2021, Jersey consumers made on average 51 pre-paid and 114 post-paid mobile call minutes per month, and 126 fixed line minutes; this represented a decrease of 18.6% on 2020. The equivalent figures for Guernsey in 2021 were 41 pre-paid and 103 post-paid mobile call minutes, and 137 fixed line minutes; this was a decrease of 12.3% on 2020.

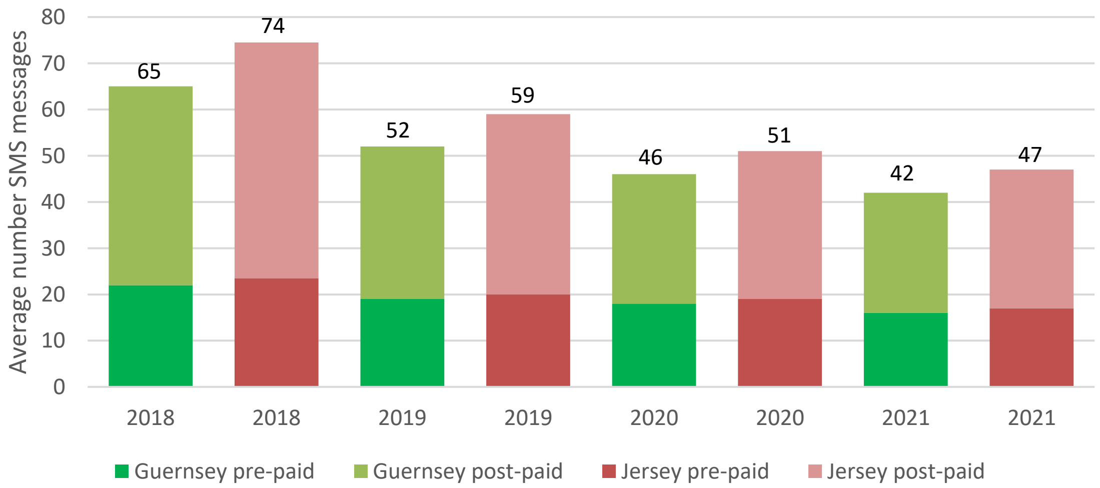
Figure 3 – Average monthly pre- and post-paid call minutes made in the Channel Islands, 2018 - 2021



In 2021, Jersey consumers sent on average 17 pre-paid and 30 post-paid SMS messages per month; this represented a decrease of 8.2% on 2020[2]. The equivalent figures for Guernsey in 2021 were 16 pre-paid and 26 post-paid messages; this was a decrease of 10.0% on 2020.

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 - 2021



[2] Note that 2020 figures have undergone minor revisions since the 2020 report was issued

Economic statistics for the telecommunications sector

£70 million
Total revenues from Guernsey-based customers

£6.0 million
Contribution to Guernsey tax through staff income tax, social security, corporate tax and property rates & TRP

209 staff employed
In Guernsey in the supply of telecommunication services to Guernsey customers as at the end of 2021

£8 million
Capital investment in fixed and mobile networks, IT infrastructure and other telecoms activities

635
Retail leased lines, primarily used by organisations for voice or data services

41 per 100 inhabitants with fixed or wireless broadband, compared to OECD average of 33

£108 million
Total revenues from Jersey-based customers

£16.0 million
Contribution to Jersey tax through staff income tax, social security, corporate tax, GST and property rates

545 staff employed
In Jersey in the supply of telecommunications services to Jersey customers as at the end of 2021

£13 million
Capital investment in fixed and mobile networks, IT infrastructure and other telecoms activities

694
Retail leased lines, primarily used by organisations for voice or data services

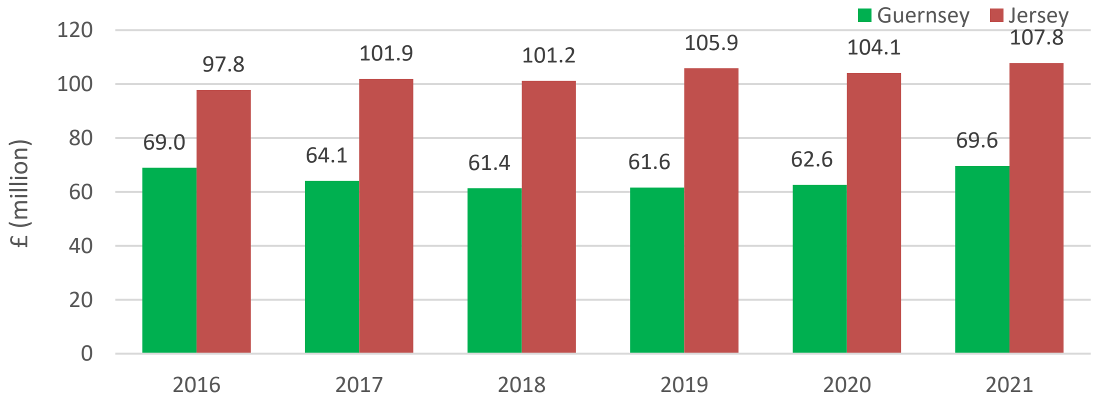
39 per 100 inhabitants with fixed or wireless broadband, compared to OECD average of 33

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[3]) was £177.5m in 2021, up 6.1% from £167.2m in 2020. Turnover includes revenues associated with Channel Island subscribers while on and off the Islands, plus revenue from visitors to the Islands in 2021.

As shown in Figure 5, total turnover in Guernsey increased by 10.3% to £69.6m in 2021 compared to 2020. In Jersey, total turnover increased by 6.1% to £107.8m.

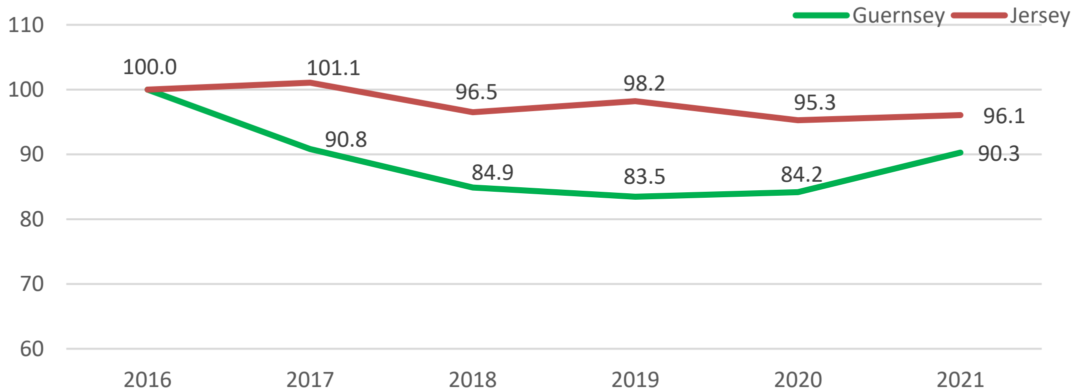
Figure 5 – Total turnover of the telecommunications industry in the Channel Islands, 2016 to 2021



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

Figure 6 shows the trend of turnover in real terms over time, with the index set to 100.0 in 2016.

Figure 6 – Index of total turnover in the Channel Islands, 2016 to 2021

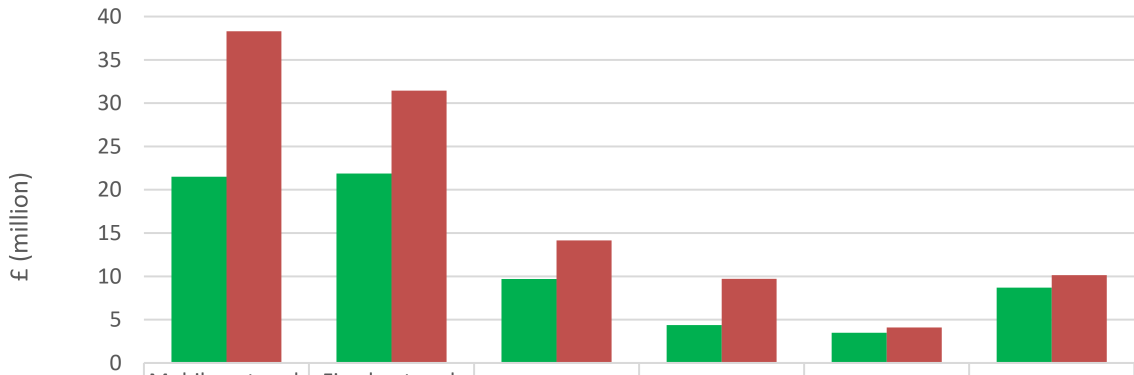


While in monetary terms, total turnover in Jersey has increased since 2016; in real terms, turnover has trended gradually downwards. In Guernsey, real terms turnover trended more steeply downwards from 2016 to 2019 before partially recovering in 2020 and 2021.

[3] The reports for years before 2016 stated revenues from all data centre activities and not just telecommunications activities within them.

Figure 7 below shows the total turnover segmented into the different types of telecommunications activity in 2021. The fixed and mobile figures include revenues from both voice and data services, and for both retail and corporate customers.

Figure 7 – Total turnover by type of telecommunication activity, 2021



	Mobile network retail	Fixed network retail	Leased lines	Wholesale	Data centre	Other
Guernsey	£21,509,509	£21,873,347	£9,693,156	£4,381,787	£3,480,881	£8,706,423
Jersey	£38,293,015	£31,441,316	£14,147,349	£9,713,223	£4,092,054	£10,148,388

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 fixed network retail which accounted for 31.4% of the total turnover. Mobile network retail generated the highest turnover in Jersey, 35.5% of the total.

Figures 8 and 9 below summarise total turnover by key service categories, with "fixed" combining fixed network retail, leased lines, wholesale and data centres.

Figure 8 – Total turnover by key service category, Guernsey 2021

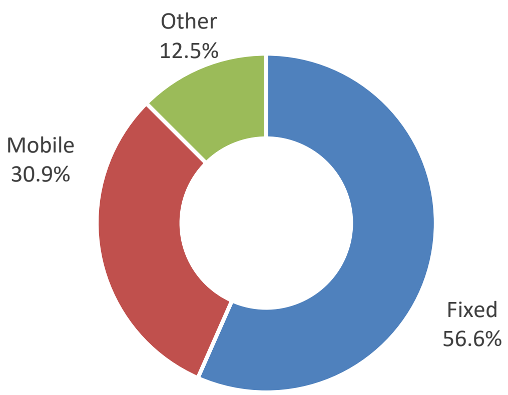
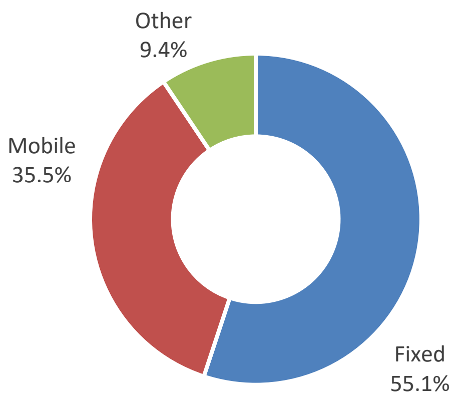


Figure 9 – Total turnover by key service category, Jersey 2021

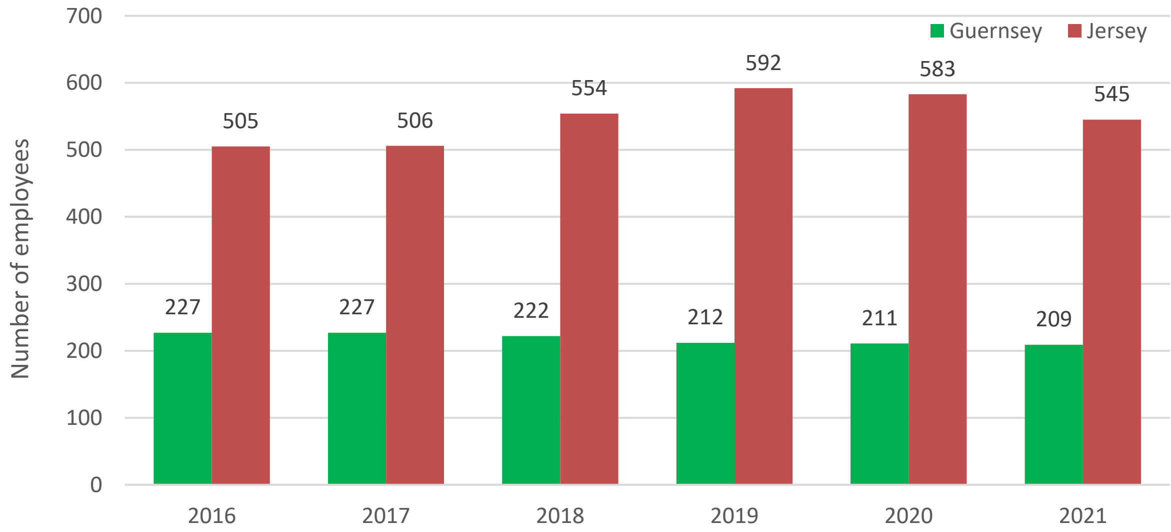


The biggest share of revenue in Guernsey and Jersey was generated in the fixed sector. In 2021 in Guernsey, it accounted for 57% of total turnover, whilst in Jersey it accounted for 55%. Growth over recent years had been in the mobile sector, but in 2021 the "other" sector showed the biggest growth in both Guernsey (148%) and Jersey (90%). For Guernsey, this increase is primarily driven by CPE sales and installation revenues relating to a large contract and for Jersey it is primarily driven by a new revenue stream linked to the sale of part of an operator's business in 2021.

Employment in the telecommunications sector

Figure 10 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 2016. Across the Islands, the sector employed 754 full time equivalent staff as at the end of 2021, representing a further decline of 38 staff.

Figure 10 – Full-time equivalent employees in the telecommunications sector, 2016 to 2021

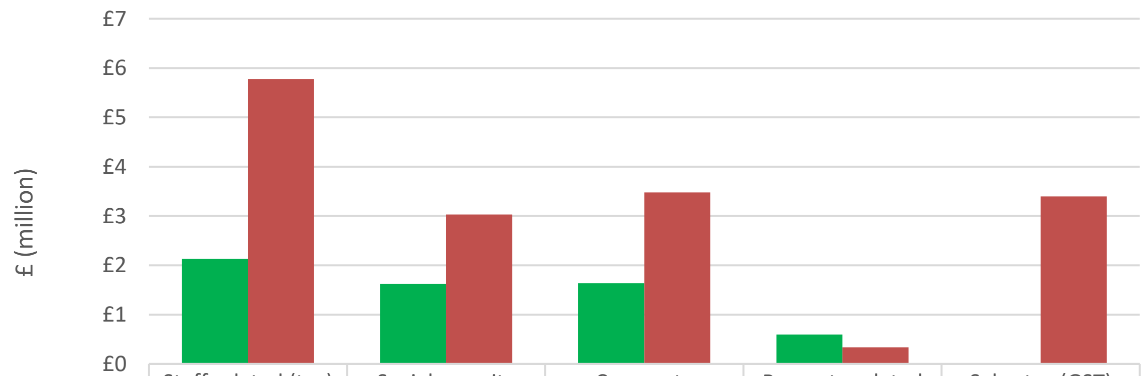


In 2021, there were 2.6 times as many staff employed in the telecommunications sector in Jersey than in Guernsey. Since 2016, the number of employees in the telecommunications sector in Guernsey has fallen by 8%, while the number of employees in Jersey has increased by 8% despite losing 47 staff since 2019.

Taxation contributions

Figure 11 shows that the telecommunications sector contributed £22.0m in taxation in 2021 (£20.3m in 2020); 6.0m in Guernsey (£6.1m in 2020) and £16.0m in Jersey (£14.4m in 2020).

Figure 11 – 2021 contributions by type of taxation



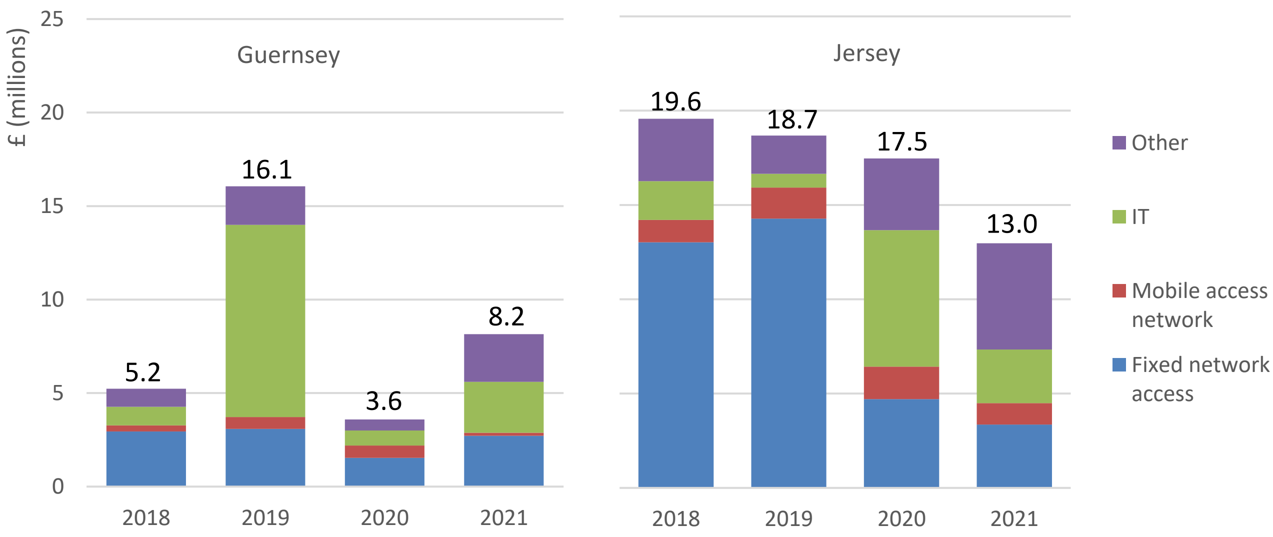
	Staff related (tax)	Social security	Corporate	Property related	Sales tax (GST)
Guernsey	£2,129,941	£1,620,036	£1,637,840	£597,103	0
Jersey	£5,777,939	£3,031,667	£3,477,677	£337,712	£3,396,890

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

Capital investment

Figure 12 shows the levels of capital investment in telecommunications in Guernsey and Jersey in the years 2018 to 2021.

Figure 12 – Capital investment in the telecommunications industry in the Channel Islands, 2018 to 2021



Capital investment expenditure has varied significantly in Guernsey over the years. It increased to £8.2m in 2021 from £3.6m the previous year. Jersey has seen more consistent ongoing investment although this has trended downwards since 2018, reducing by 33% to £13.0m over this period.

Fixed network market

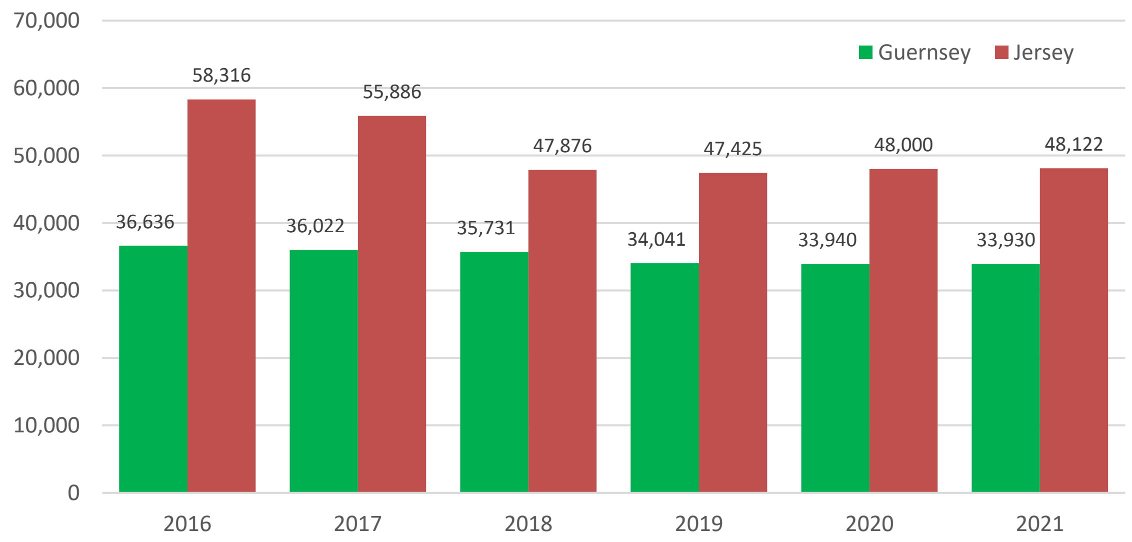
The fixed network market is characterised by consumer equipment that is in a fixed geographic location and used to make/receive voice calls, send/receive faxes and to support broadband and leased line services. In contrast, the consumer equipment in the mobile market is not fixed to a single geographic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

Information on fixed network broadband and fixed network leased line services is contained in later sections of this report.

Total number of lines and subscriptions

Figure 13 shows the number of fixed lines in the Islands during the period 2016 to 2021. The apparent sudden fall in Jersey in 2018 is likely to be a result of reporting differences. In 2021, the number of fixed lines and subscriptions remained effectively the same in both Guernsey (33,930) and Jersey (48,122).

Figure 13 – Number of retail fixed lines and subscriptions in the Channel Islands, 2016 to 2021



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

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 2021. Subscription to the WLR and carrier select services have increased in both Islands compared to 2020.

Table 1 – Subscriptions to alternative carriers

	Guernsey	Jersey
Carrier select	146	322
Wholesale Line Rental	4,037	10,737
Total	**4,183**	**11,059**

Source: Industry questionnaires

Fixed telephony minutes

Figures 14 and 15 show the numbers of minutes carried by operators in Guernsey and Jersey annually between 2016 and 2021. For 2021, 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 from 2016-2019. 2020 showed a small spike in the number of fixed line calls in Guernsey, Jersey and the UK[4] (possibly an effect of COVID-19 lockdown). Compared to 2020, fixed line call minutes decreased in Guernsey by 16.6% to 55.9 million and in Jersey by 24.9% to 72.8 million.

Figure 14 – Number of fixed line minutes in Guernsey by operator, 2016 to 2021

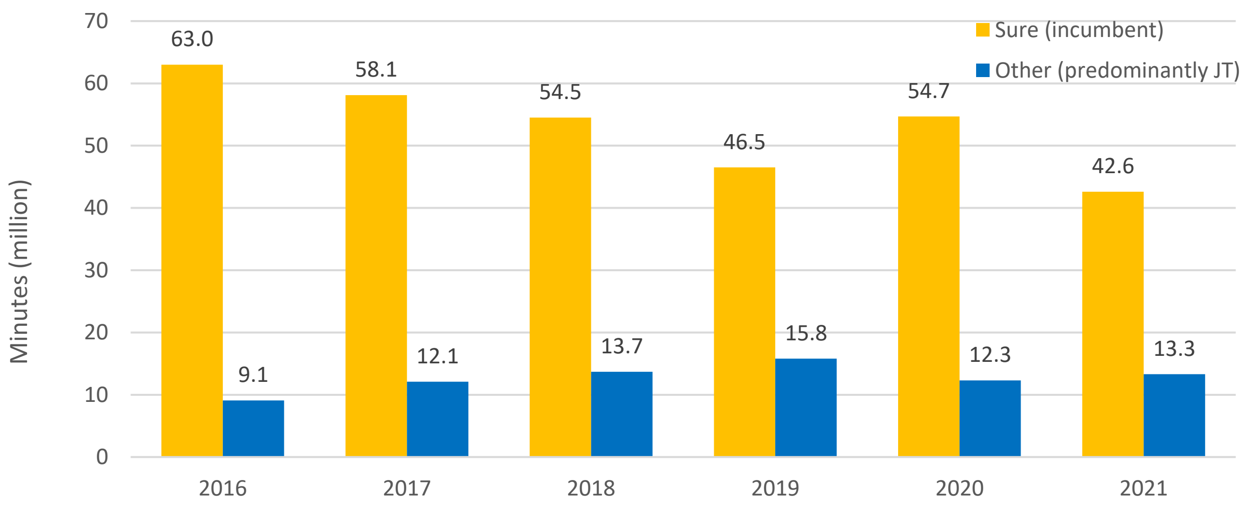
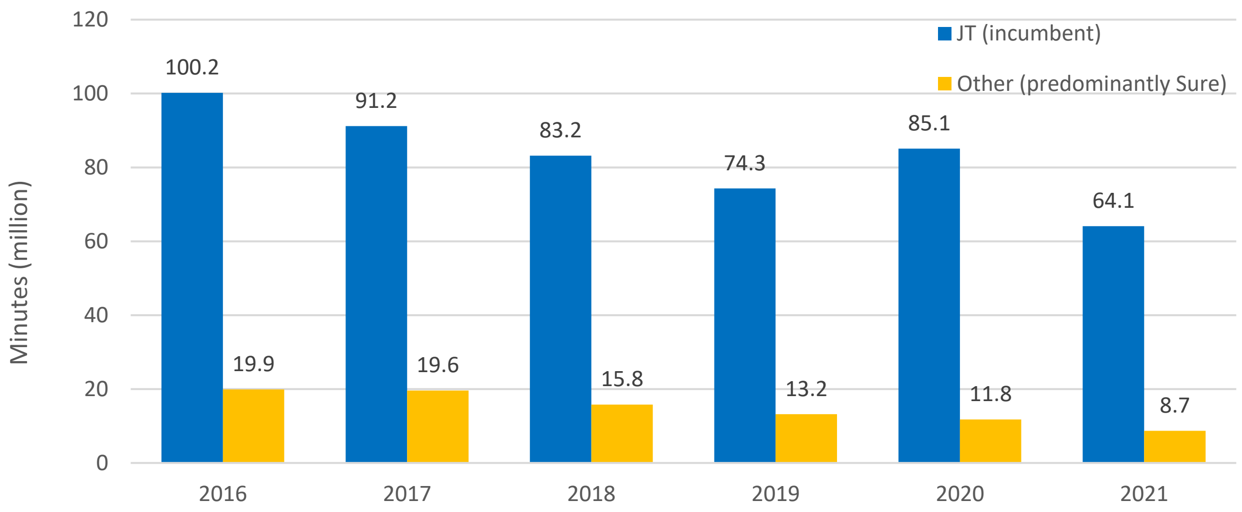


Figure 15 – Number of fixed line minutes in Jersey by operator, 2016 to 2021



[4] 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.

The trend shows penetration rates continue to follow a gradual decline in fixed line connections in Guernsey.

*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 fixed retail line connections per 100 inhabitants, 2016 to 2021

	Guernsey	Jersey
2016	59	*
2017	58	*
2018	57	*
2019	54	*
2020	54	46[5]
2021	53	47

Revenues

Excluding broadband and leased line services, revenues associated with fixed networks in 2021 were £12.5m in Guernsey (£11.3m in 2020) and £14.0m in Jersey (£14.1m in 2020).

Figures 16 and 17 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 16 – Fixed network revenues Guernsey

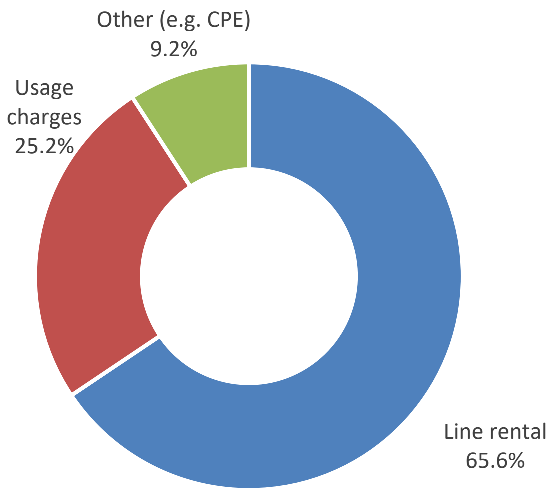
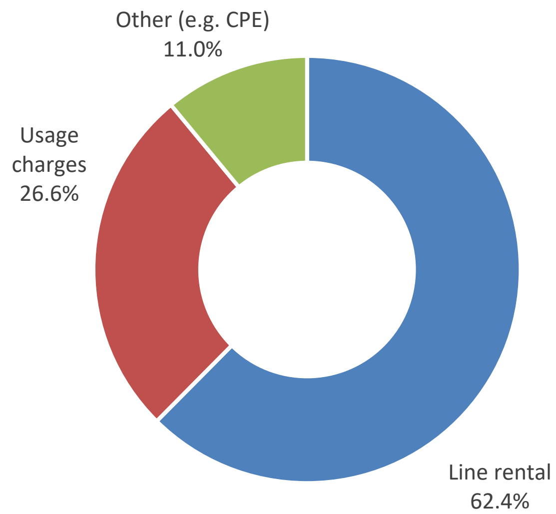


Figure 17 – Fixed network revenues Jersey



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

The average revenue per fixed line (wireline and wireless) from line rental, usage charges and associated equipment and services in Guernsey in 2021 was £369.32 (£30.78 per month), showing an increase of 10.7% compared to 2020.

Excluding GST, the equivalent annual figure for 2021 in Jersey was £290.81 (£24.23 per month), a decrease of 0.8% compared to 2020. Charges for services such as broadband are in addition to these.

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

Fixed network broadband market

Fixed network broadband services are those delivered over physical copper connections, fibre connections and fixed wireless communications links (e.g. WiMax). 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. Historically, the proportion of business users is thought to be around 5% of the total subscriber base. No attempt is made in this report to distinguish between the two groups.

Subscriptions and penetration rates

Table 3 shows historic levels in both Islands for fixed broadband subscriptions and overall broadband subscriptions (including mobile substitutions). In 2021, the number of fixed line broadband subscriptions increased by 2.0% to 25,855 in Guernsey and increased by 2.6% to 40,728 in Jersey.

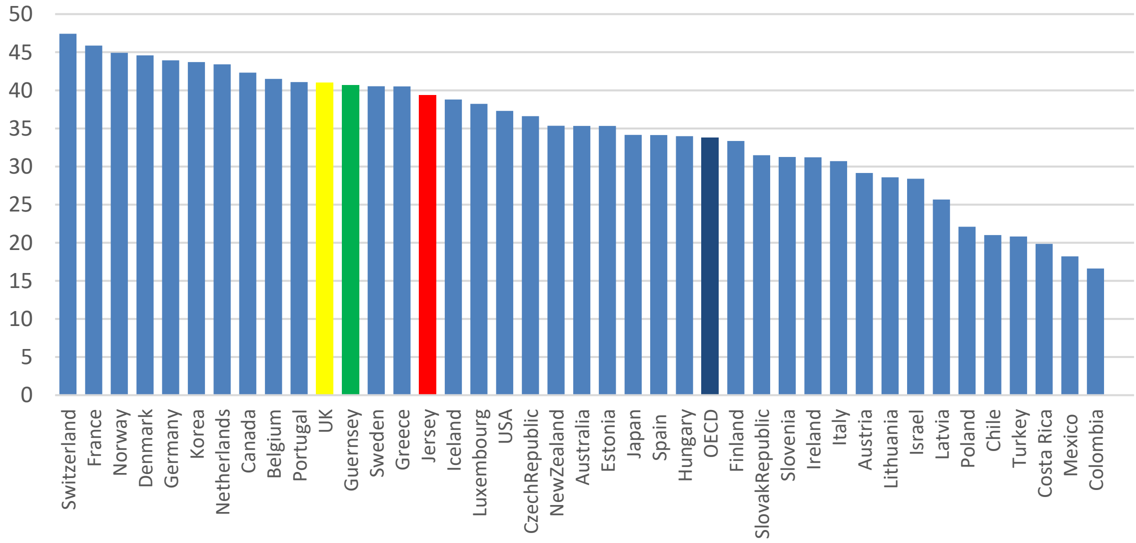
Table 3 – Numbers of fixed broadband subscriptions in the Channel Islands, 2016 to 2021

	Guernsey		Jersey	
	Excluding data only mobile broadband	Including data only mobile broadband	Excluding data only mobile broadband	Including data only mobile broadband
2016	23,226	24,558	35,877	39,228
2017	23,971	25,520	37,233	41,160
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

From 2016, there has been a gradual upward trend in broadband subscriptions in both Islands.

As illustrated in Figure 18, the Islands have penetration rates higher than OECD average of 33.8 subscriptions per 100 inhabitants but lower than the UK penetration rate of 41.0. In 2021, Guernsey had 40.7 subscriptions per 100 inhabitants and Jersey 39.4. When data-only mobile access is included, penetration rates are 44.8 for Guernsey and 43.4 for Jersey.

Figure 18 – 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 19 and 20 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. [6]

Figure 19 – Fixed network broadband market share by number of subscriptions – Guernsey

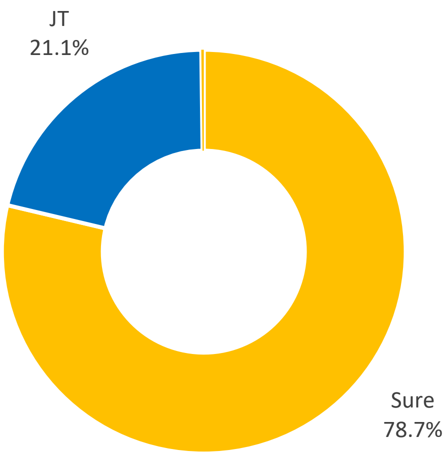


Figure 20 – Fixed network broadband market share by number of subscriptions – Jersey

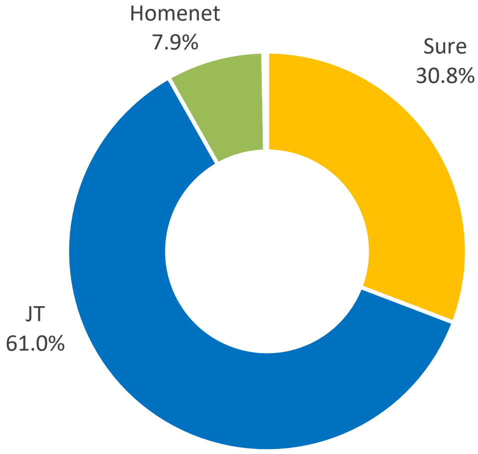


Table 4 shows historic market shares in the fixed broadband market in Guernsey and Jersey between 2016 and 2021.

Table 4 – Fixed broad band market share (%) in Guernsey and Jersey, 2016 to 2021

	Guernsey		**Jersey**		
	Sure	JT	Sure	JT	Homenet (and others)
2016	85	15	27	68	5
2017	82	18	30	61	9
2018	82	18	32	60	8
2019	80	20	32	60	8
2020	79	21	32	60	8
2021	79	21	31	61	8

In Guernsey, market share remained effectively unchanged in 2021, following 4 years of gradual JT gain.

In Jersey, Sure lost 1 percentage point of market share to JT after 3 years unchanged.

[6] Airtel entered the Broadband market in both Jersey and Guernsey in November 2021. Their market share was too small to be presented in Figures 19 and 20.

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 (based on ADSL technology) and up to 100Mbps (based on VDSL technology). However, there are some fibre connections. 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.

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.

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 also provides services through its WiMax and Fibre to the Home (FTTH) networks providing services up to 20Mbps and 100Mbps.

Figures 21 and 22 show the proportions of fixed network broadband subscriptions by download speed on the historically reported basis of 'up to' speeds[7] 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 21 – Fixed broadband subscriptions by download speed, Guernsey 2021

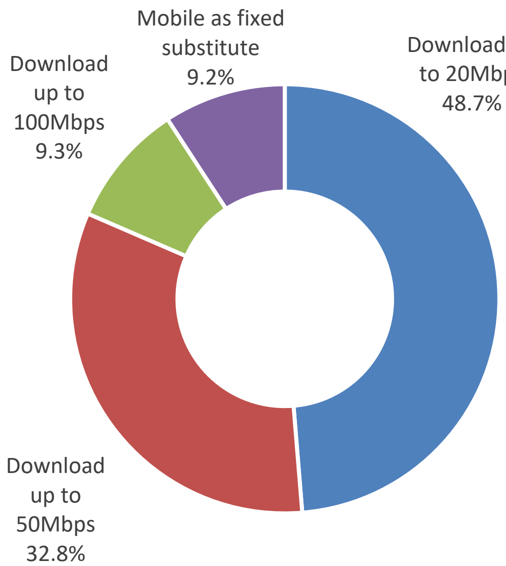
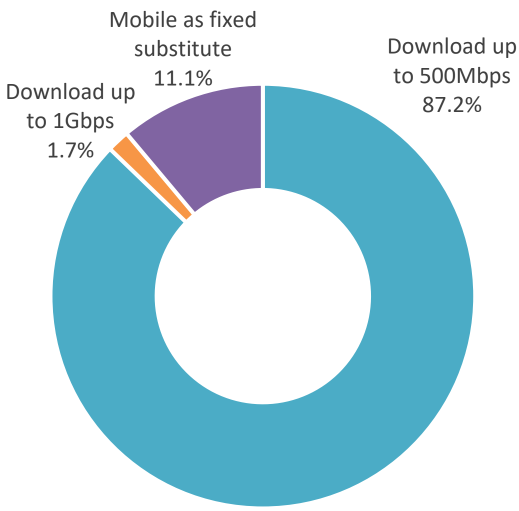


Figure 22 – Fixed broadband subscriptions by download speed, Jersey 2021



The proportion of broadband subscriptions in Guernsey with download speeds of up to 50 and 100 Mbps continues to increase, from 37.6% in 2020 to 42.1% in 2021.

In Jersey, in March 2020, in response to the COVID-19 pandemic, all customers on the JT network had their speed boosted to symmetrical 1Gb/s at no extra cost and this remained the case throughout 2021. The proportion of broadband subscriptions with download speeds of up to 500 Mbps and 1 Gbps has decreased slightly from 91.2% to 89.5% in 2021.

[7] 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 2021 by broadband subscribers in Guernsey increased by 21.1% to 92,968,590 Gbytes. In Jersey, the volume of data in 2021 increased by 20.2% to 170,494,212 Gbytes.

On average, fixed network broadband subscribers (including mobile substitutions) in Guernsey each sent and received an average of 300 Gbytes of data per month in 2021 while subscribers in Jersey each sent and received an average of 349 Gbytes per month. The equivalent figures for 2020 were 252 Gbytes in Guernsey and 298 Gbytes in Jersey, demonstrating a significant increase (18.7% and 17.1% respectively). Data usage continues to rise rapidly, as has been seen in the UK where data usage per subscriber has risen to 453 Gbytes per month in 2021 (up from 429 Gbytes in 2020).[8]

There had been a strong upward trend prior to 2020, but the large increases in data usage in 2021 compared to 2020 in both Islands are likely to be related to continuing changes in consumer needs brought about by COVID-related lockdowns, leading to increased home working and schooling.

Revenues

Total retail revenues in 2021 from fixed broadband services were £10.3m in Guernsey; up from £9.6m in 2020. Revenues in Jersey in 2021 have increased to £17.6m from £16.6m in 2020.

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. 98.4% of revenues were derived from basic subscriptions and 1.6% 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. 95.2% of revenues in Jersey were derived from basic subscriptions and 4.8% from other sources.

Average revenue per subscription

Estimated[9] average revenue per fixed network broadband subscription in Guernsey was £398 for the year (£33.16 per month). This shows an increase of 5.2% compared to 2020.

The equivalent 2021 figures in Jersey were £432 for the year (£35.98 per month), showing an increase of 3.0% compared to 2020.

The above figures exclude revenues from associated line rental.

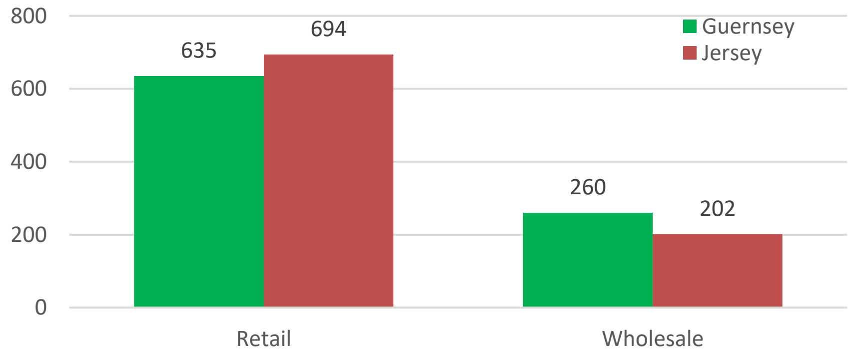
[8] Ofcom report : Connected Nations 2021 Connected Nations 2021: UK report (ofcom.org.uk)

[9] 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 23 – Number of retail and wholesale leased lines in the Channel Islands, 2021[10]



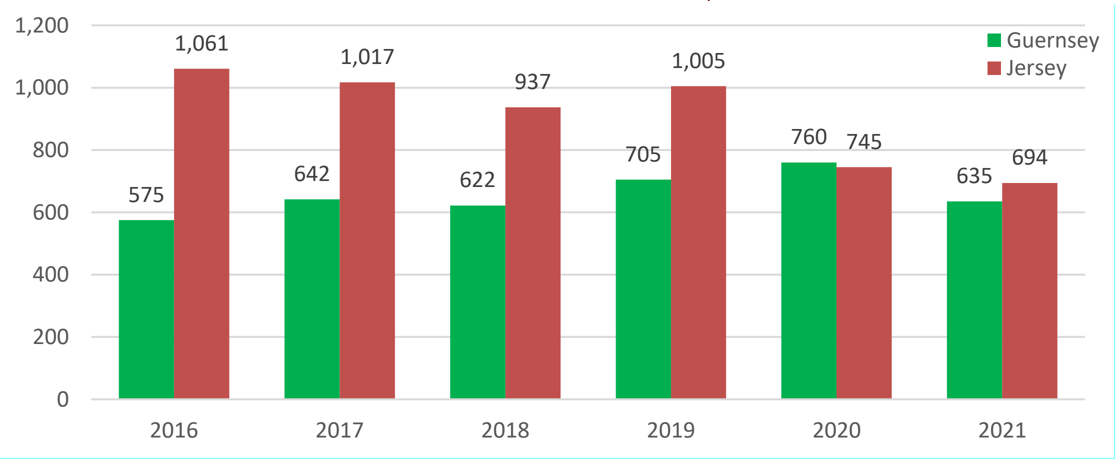
The number of retail leased lines has decreased in both Islands: to 635 from 760 in 2020 in Guernsey, and to 694 from 745 in Jersey. Wholesale leased lines have also decreased in both Islands: to 260 from 287 in Guernsey, and to 202 from 207 in Jersey.

Table 5 – Numbers of leased lines by usage, 2021

	Guernsey			Jersey		
	On-Island	Inter-Island	Off-Island	On-Island	Inter-Island	Off-Island
Retail	503	40	92	510	43	141
Wholesale	222	3	35	148	2	52

Figure 24 shows the number of retail leased lines in the Islands during the period 2016 to 2021.

Figure 24 – Number of retail leased lines in the Channel Islands, 2016 to 2021



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 decreased in 2021.

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

Market share by numbers of leased line subscriptions

Figures 25 and 26 show the retail market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions. In 2021, JT was the main retail provider in both Islands.

Figure 25 – Retail leased line market share by number of subscriptions – Guernsey

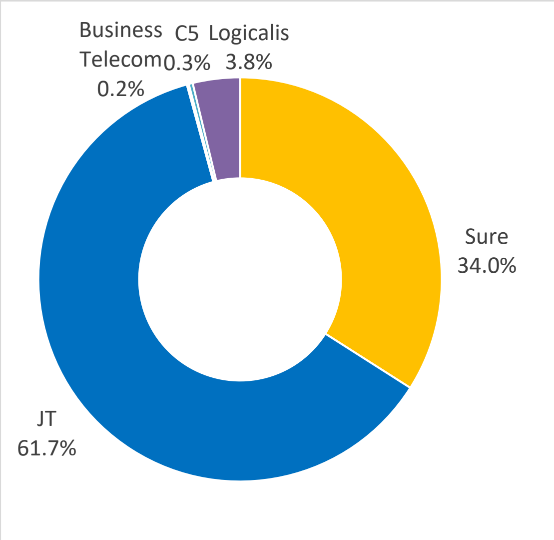
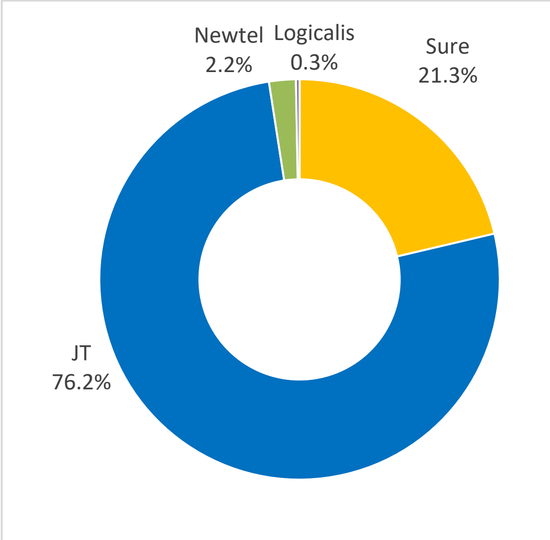


Figure 26 – Retail leased line market share by number of subscriptions – Jersey

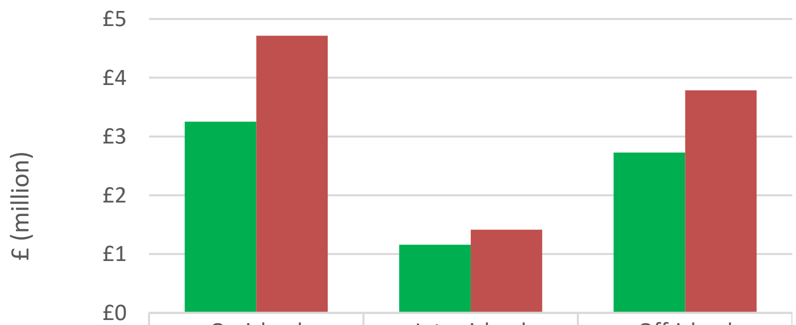


Retail leased line revenues

Total revenues from retail leased lines in Guernsey in 2021 were £7.1m (£6.3m in 2020), and in Jersey in 2021 were £9.9m (£9.0m in 2020). These figures exclude wholesale leased lines[11].

Figure 27 shows the breakdown of these totals by on-Island, inter-Island and off-Island services.

Figure 27 – Revenues from retail leased lines by activity, 2021



	On-island	Inter-island	Off-island
Guernsey	£3,251,416	£1,158,141	£2,727,163
Jersey	£4,713,094	£1,413,532	£3,786,955

N.b. The figures within the chart exclude wholesale leased line revenue and do not represent the total revenue derived from leased lines in each Island.

[11] Note that 2020 figures have undergone minor revisions since the 2020 report was issued

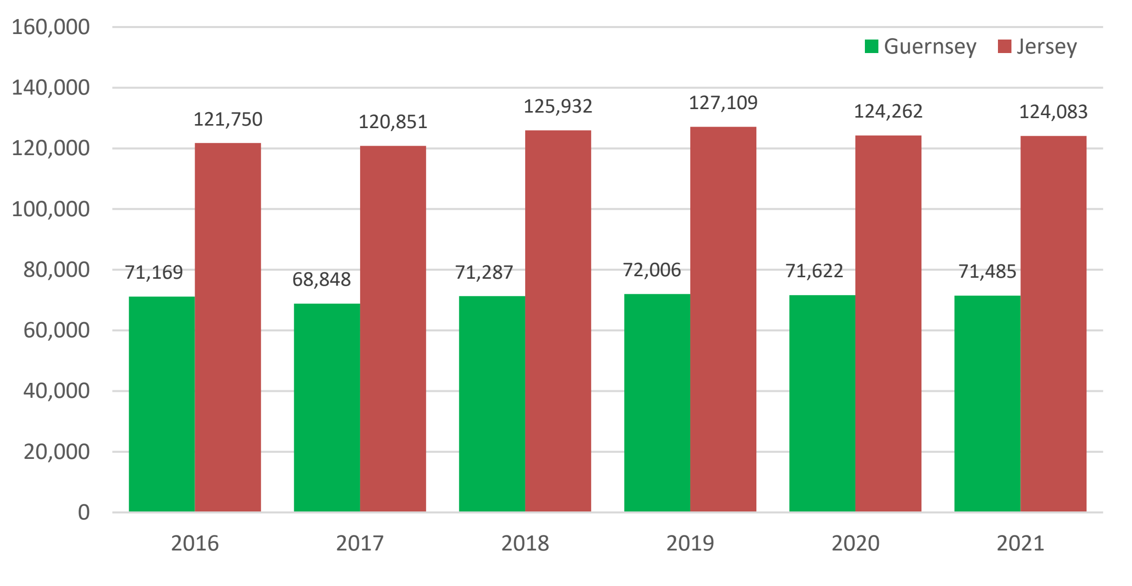
Mobile market

Subscriptions, penetration rates and market shares

In 2021, 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 28 shows the total number of mobile subscriptions in the Islands during the period 2016 to 2021. The figures include pre-paid (i.e. pay as you go) and post-paid (i.e. contract) subscriptions.

Figure 28 – Number of active mobile subscriptions in the Channel Islands, 2016 to 2021



N.b. The figure for Jersey in 2016 is estimated due to reporting difficulties for one operator.

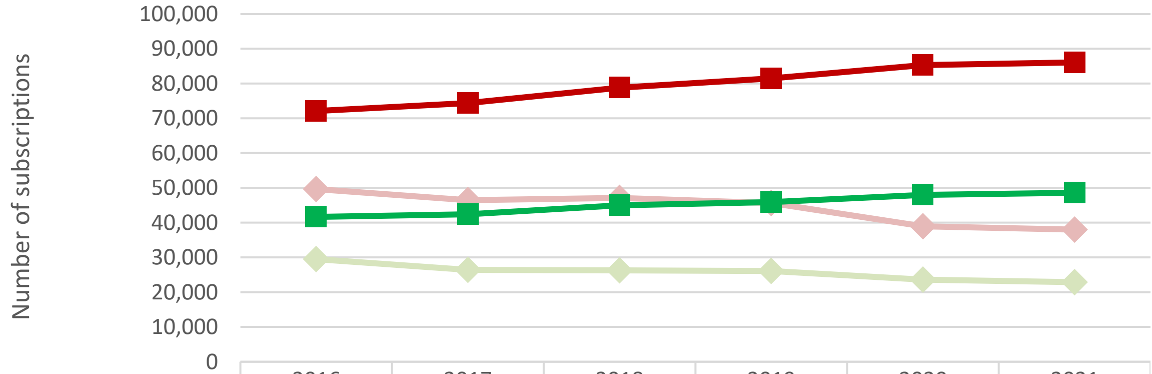
Overall, in 2021 the total number of mobile subscriptions in the Channel Islands remained fairly constant (a decrease of only 0.2% to 195,568 compared to 2020). In 2021, there was a decrease in mobile subscriptions in Guernsey of 0.2% compared to 2020 and in Jersey there was a decrease of 0.1%.

The upward trend in post-paid subscriptions continued in both Islands in 2021, whilst there has been a continued decrease in pre-paid subscriptions; down by 3.0% in Guernsey and 2.4% in Jersey compared to 2020. While the decreases in pre-paid subscriptions have continued, they are much less than the 2020 decreases (which were 9.5% and 14.5% in Guernsey and Jersey respectively).

Figure 29 on the next page provides a breakdown of pre-paid and post-paid mobile subscriptions in each Island over the period 2016 to 2021.[12]

[12] 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 29 – Pre- and post-paid mobile subscriptions, 2016 to 2021



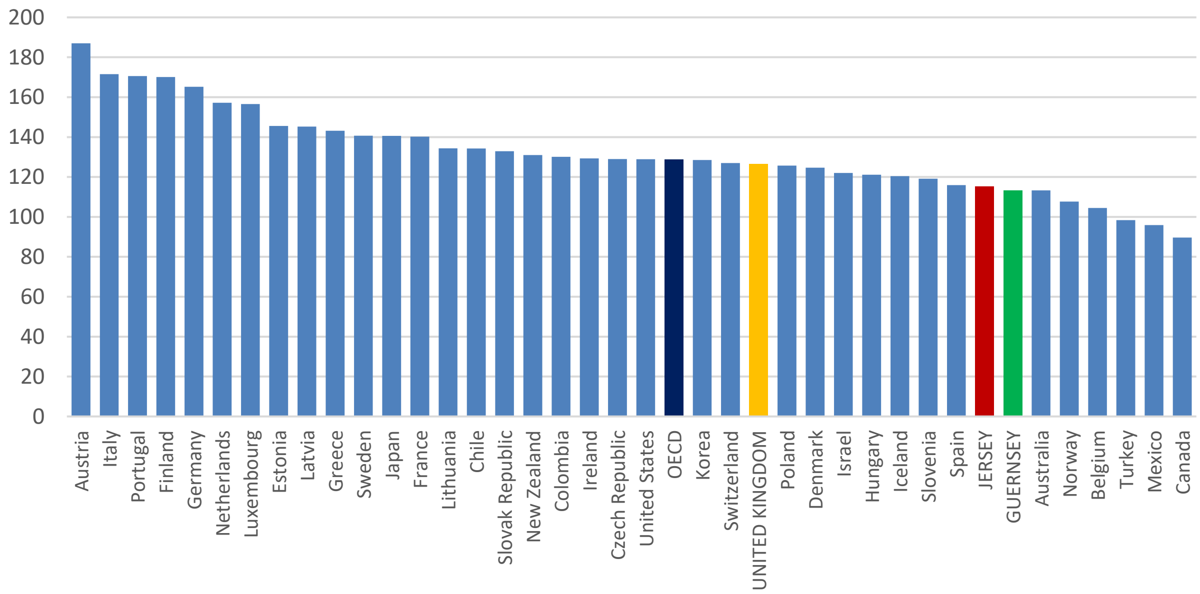
	2016	2017	2018	2019	2020	2021
Jersey post-paid	72,106	74,401	78,830	81,487	85,314	86,076
Jersey pre-paid	49,644	46,450	47,102	45,622	38,948	38,007
Guernsey post-paid	41,662	42,433	44,991	45,901	48,009	48,590
Guernsey pre-paid	29,507	26,415	26,296	26,105	23,613	22,895

N.b. Jersey figures for 2018 have been adjusted since the 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 2021 in Guernsey there were 112 active subscriptions per 100 inhabitants, and in Jersey there were 120 subscriptions per 100 inhabitants. These penetration rates in 2021 represent a slight decrease from 2020.

Figure 30 shows the mobile penetration rates in Guernsey and Jersey compared to the penetration rates within OECD countries.

Figure 30 – Jersey, Guernsey & OECD cellular mobile penetration, subscriptions per 100 inhabitants



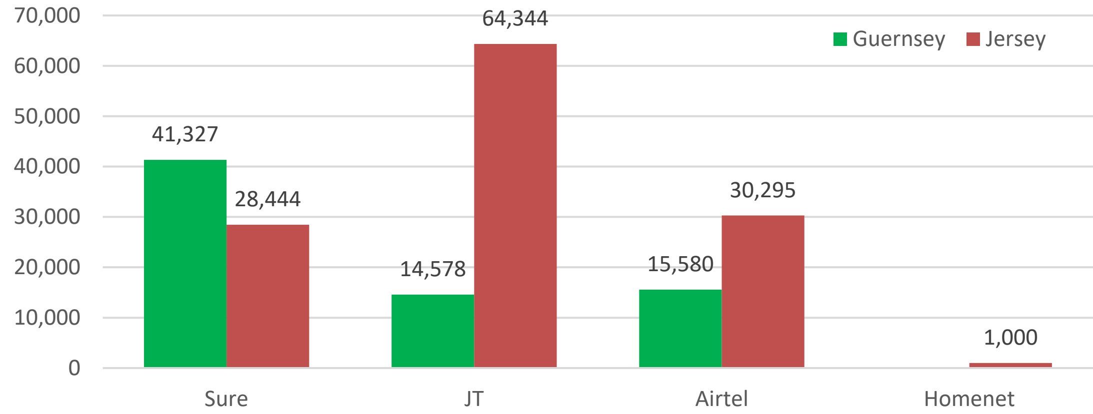
Sources: Statistics Jersey & OECD[13] (April 2020). N.b. The comparative data set used in the 2018 report was incorrect.

The chart shows that mobile penetration rates in the Channel Islands were lower than in the UK (126) and also than the OECD average (129).

[13] OECD data updated April 2020: https://www.oecd.org/sti/ieconomy/oecdkeyictindicators.htm

Figure 31 provides a breakdown of the total number of mobile subscriptions for the 4 mobile operators in the Islands.[14]

Figure 31 – Number of mobile subscriptions by operator, 2021



Compared to 2020, Sure has seen increased subscriptions in Guernsey (4.7% growth) whereas JT and Airtel have both seen reductions (2.5% and 9.4% respectively). In Jersey, Sure and JT have both seen a small reduction in subscriptions (1.6% and 0.6%) while Airtel have grown their subscriptions by 2.3%.

Table 6 shows the market shares of each operator in Guernsey and Jersey respectively between 2016 and 2021. Over the whole of 2021, Sure supplied 58% of the mobile subscriptions in Guernsey, followed by Airtel (22%) and JT (20%). In Jersey, market share remained the same as in 2020: JT supplied 52% of total mobile subscriptions, with Airtel supplying 24% and Sure 23%. Homenet had 1% of the mobile subscriptions market in Jersey.

Table 6 – Mobile market share (%) of subscriptions in Guernsey and Jersey, 2016 to 2021

	Guernsey			**Jersey**			
	Sure	JT	Airtel	Sure	JT	Airtel	Homenet
2016	59	20	21	24	55	21	0
2017	60	19	22	25	54	21	0
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

In Guernsey, the incumbent operator Sure had been gradually losing market share since 2017, but this trend was reversed in 2021. In Jersey, market share between the four operators has remained largely unchanged since 2018.

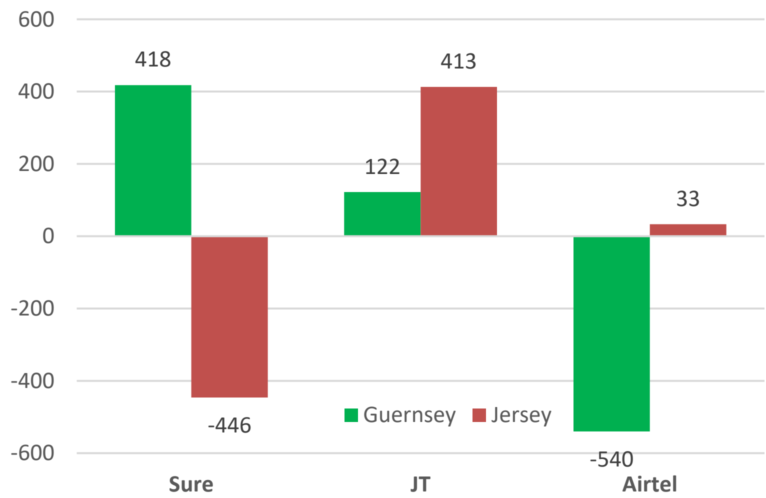
[14] All mobile operators report “Active Subscribers” based on a 90-day cycle period.

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 32, the net change in subscribers is shown, calculated by subtracting the number of subscribers 'porting-out' from the number 'porting -in'.

Figure 32 – Net number of consumers switching mobile service provider, 2021



Source: Porting XS MNP Channel Islands data 2021

In Jersey in 2021, continuing the trend from the previous year, Sure made a net loss of mobile consumers to JT and 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, 2021

	Guernsey			Jersey		
	Sure	JT	Airtel	Sure	JT	Airtel
Port in	1,217	503	591	669	1,251	749
Port out	799	381	1,131	1,115	838	716
Net benefit	418	122	-540	-446	413	33

Source: Porting XS MNP Channel Islands data 2021

Table 8 shows the percentage of registered mobile numbers that switched service provider in Guernsey and Jersey from 2016 to 2021. In Guernsey 3.2% of registered mobile numbers switched or "ported" between service providers in 2021, whilst in Jersey the figure was 2.2%. Porting activity remains at a level below that in the UK, where 10% of the active subscriber base ported in 2015.[15] [16]

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

[16] 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, 2016 to 2021

% of mobile subscribers switching provider	2016	2017	2018	2019	2020	2021
Guernsey	1.6	2.8	2.8	2.5	2.3	3.2
Jersey	2.4	3.7	3.1	2.5	2.0	2.2

Source: Porting XS MNP Channel Islands data 2016 to 2021 and Industry questionnaires

2,311 mobile subscribers in Guernsey switched or "ported" between service providers in 2021. In Jersey, the equivalent figure was 2,669.

In 2021, the number of working days required to complete a successful port from one service provider to another was at 1.3 working days in Guernsey and 1.1 working days Jersey.[17] The European Commission's Universal Service Directive requires operators to provide porting within 1 working day.[18]

Table 9 – Average porting time in Guernsey and Jersey, 2016 to 2021

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

Average porting times in Guernsey increased to 1.3 working days in 2021 from 1.1 working days in 2020. This followed a period of stability at 1.2 working days between 2016 and 2019. Average porting times in Jersey were at 0.9 working days in both 2017 and 2018, increasing to 1.2 days in 2019, before decreasing to 1.1 days in 2020 and 2021.

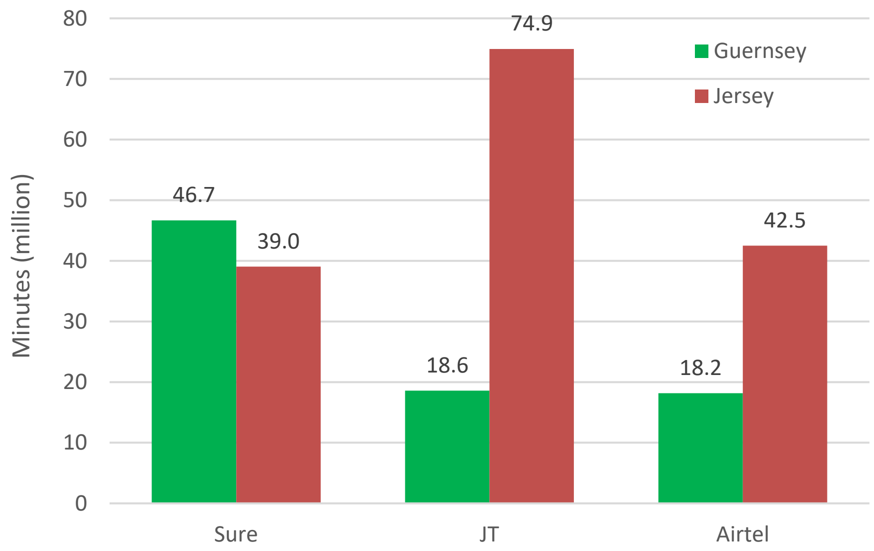
[17] Figures provided to the JCRA and GCRA by Porting XS

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

Voice traffic - numbers of minutes

Figure 33 shows the number of mobile voice minutes originating on each operator's network in each Island in 2021. 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 33 – Total number of mobile minutes originating on CI mobile networks, 2021



Source: Industry questionnaires

The total number of mobile minutes has decreased by 6.3% in Guernsey to 83.4 million in 2021 and has decreased by 11.8% in Jersey to 156.5 million.[19]

Table 10 shows the average number of mobile voice minutes in 2021 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, 2021

	Guernsey	Jersey
Minutes per pre-paid subscriber	492	609
Minutes per post-paid subscriber	1,237	1,368

Source: Industry questionnaires

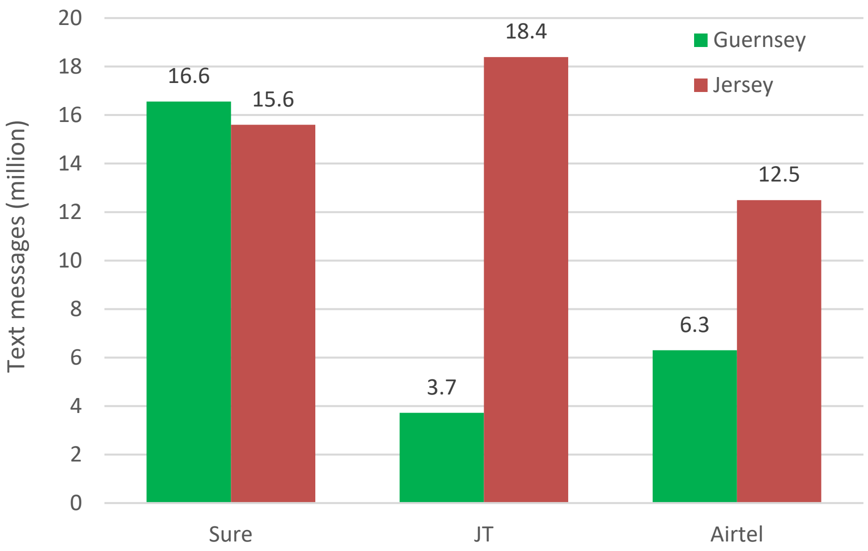
Compared to 2020, in Guernsey the number of minutes per pre-paid and post-paid subscriber have decreased by 4.2% and 9.3% respectively. In Jersey, minutes per pre-paid subscriber have decreased by 7.8% and minutes per post-paid subscriber have decreased by 14.9%.

[19] Note that 2020 figures have undergone minor revisions since the 2020 report was issued

SMS traffic – numbers of messages

Figure 34 shows the number of SMS text messages originating on each operator's network in each Island in 2021. These include SMS messages associated with in-roaming activities.

Figure 34 – Total number of SMS text messages originating on CI mobile networks, 2021



Source: Industry questionnaires

Overall, text volumes have continued to fall slightly in both Islands. In Guernsey, the number of messages decreased by 3.8% to 26.6 million; in Jersey the number of messages also decreased by 3.8% to 46.5 million[20].

Table 11 shows the average number of SMS text messages sent in 2021 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, 2021

	Guernsey	Jersey
SMS messages per pre-paid subscriber	187	200
SMS messages per post-paid subscriber	307	362

Source: Industry questionnaires

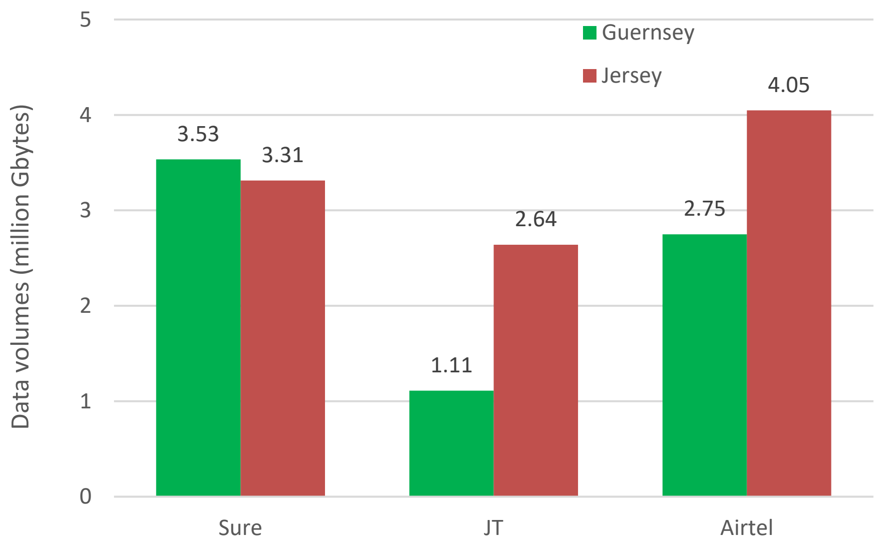
Compared to 2020, in Guernsey the number of SMS messages per pre-paid subscriber decreased by 13.1% and the number of SMS messages per post-paid subscriber decreased by 8.1%. In Jersey, the number of SMS messages per pre-paid subscriber decreased by 10.8% and the number of SMS messages per post-paid subscriber decreased by 6.9%[15].

[20] Note that 2020 figures have undergone minor revisions since the 2020 report was issued

Mobile data

Figure 35 shows the volume of data (in Gbytes) sent and received over each operator's network in each Island in 2021. These include data associated with pre-paid and post-paid mobile sims and in-roaming activities.

Figure 35 – Mobile data volumes (million Gbytes) sent and received on CI mobile networks, 2021



Overall, data volumes have continued to increase in both Islands. In Guernsey, the volume of data increased by 25.2% to 7.40 million Gbytes, and in Jersey the volume of data increased by 4.6% to 10.00 million Gbytes.

Table 12 shows the average data volume (in Gbytes) consumed in 2021 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	78.97	69.47
Gbytes of data per post-paid subscriber	104.70	77.12

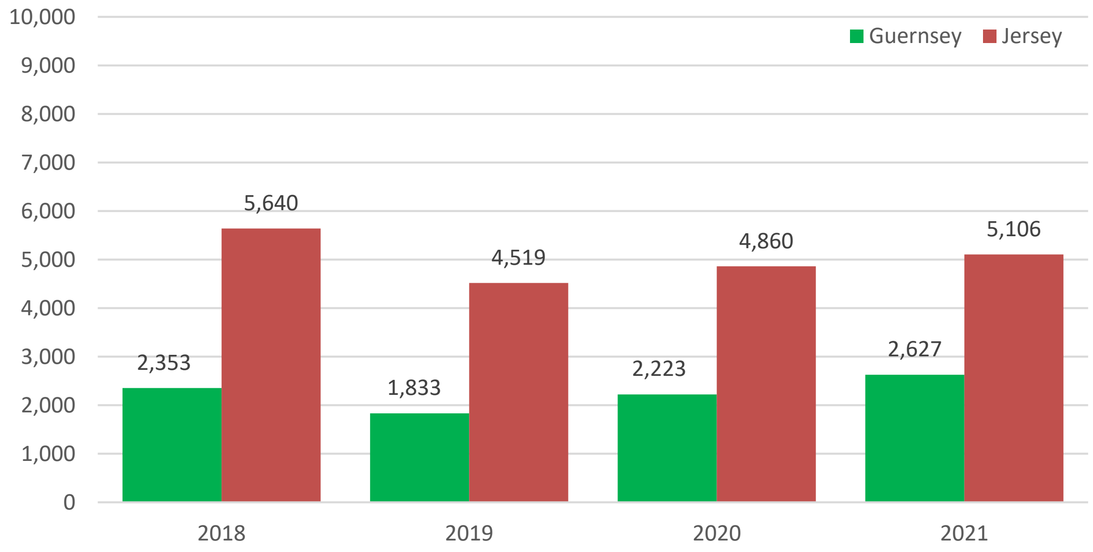
Compared to 2020, in Guernsey the volume of data per pre-paid subscriber increased by 35.1% and the volume of data per post-paid subscriber increased by 21.1%. In Jersey, the volume of data per pre-paid subscriber increased by 22.6% and the volume of data per post-paid subscriber decreased by 3.4%.

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 36 – Number of data only subscriptions, 2018 to 2021



In 2021, there were 2,627 mobile subscriptions for data only in Guernsey and in Jersey there were 5,106. This represents an increase of 18.2% in Guernsey, and 5.1% in Jersey.

Mobile revenue

Total revenues from mobile related activities in Guernsey in 2021 were £21.8m and in Jersey £38.0m. Revenue has increased in both Islands compared to 2020 (Guernsey increased by 2.9%, Jersey by 3.4%). Figures 37 and 38 provide a breakdown of the sources of mobile revenues.

Figure 37 – Sources of mobile revenue in Guernsey

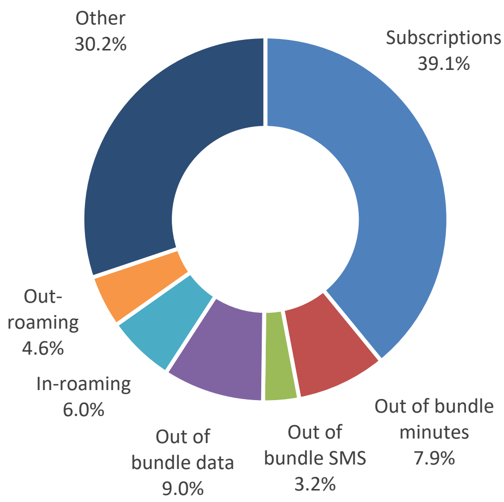
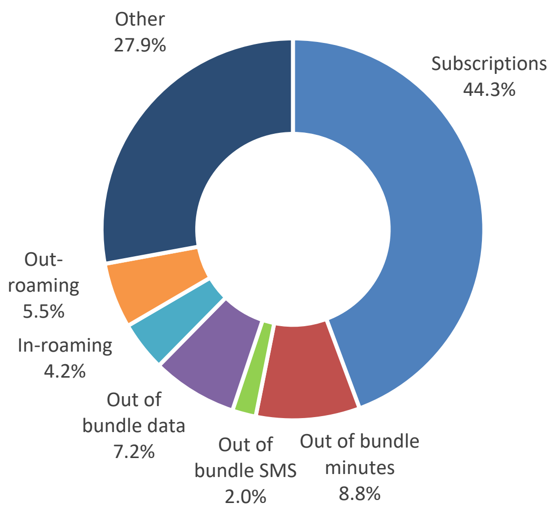


Figure 38 – Sources of mobile revenue in Jersey



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, 2021

		Guernsey	Jersey
Pre-paid	During 2021	£128.85	£126.02
	Ave per month	£10.74	£10.50
Post-paid	During 2021	£225.42	£244.12
	Ave per month	£18.79	£20.34

In Guernsey, the spend per pre-paid subscriber has increased by 6.2% compared to 2020, and the spend per post-paid subscriber has increased by 5.8%. In Jersey, the equivalent changes were increases of 0.4% and 2.5% respectively[21].

[21] Note that 2020 figures have undergone minor revisions since the 2020 report was issued

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, 2021

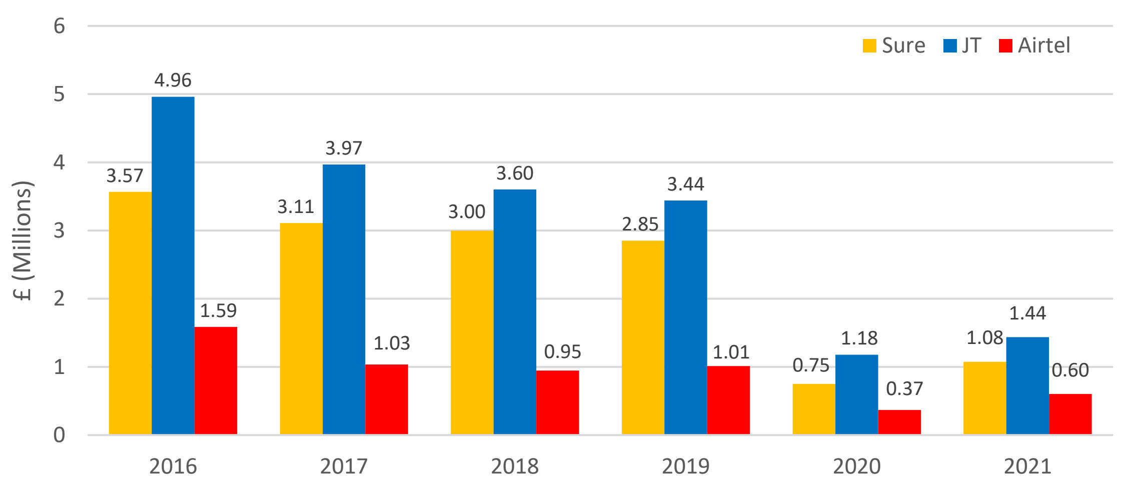
	Guernsey	Jersey
Minutes	1,104,340	2,458,485
SMS texts	299,919	696,541
Data (Gbytes)	8,754	36,905

Out-roaming revenues

In 2021, operators in the Channel Islands generated total revenues of £3.1m from out-roaming activities (compared to £2.3m in 2020); 5.5% of total mobile revenue (excluding in-roaming revenues).

Figure 39 shows total out-roaming revenues in the period 2016 to 2021, combining Guernsey and Jersey. Out-roaming revenues for the Channel Islands have risen 35.7% since 2020, however they are still well below pre-pandemic levels.

Figure 39 – Total out-roaming revenues in the Channel Islands, 2016 to 2021



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	63,590 estimated on 30 June 2021
Jersey	103,267 estimated on 21 March 2021

Due to the publication of the Jersey census results, a revised estimate of Jersey's 2020 population will also be used in this report.

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 measure of bandwidth 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

26 July 2022

Appendix

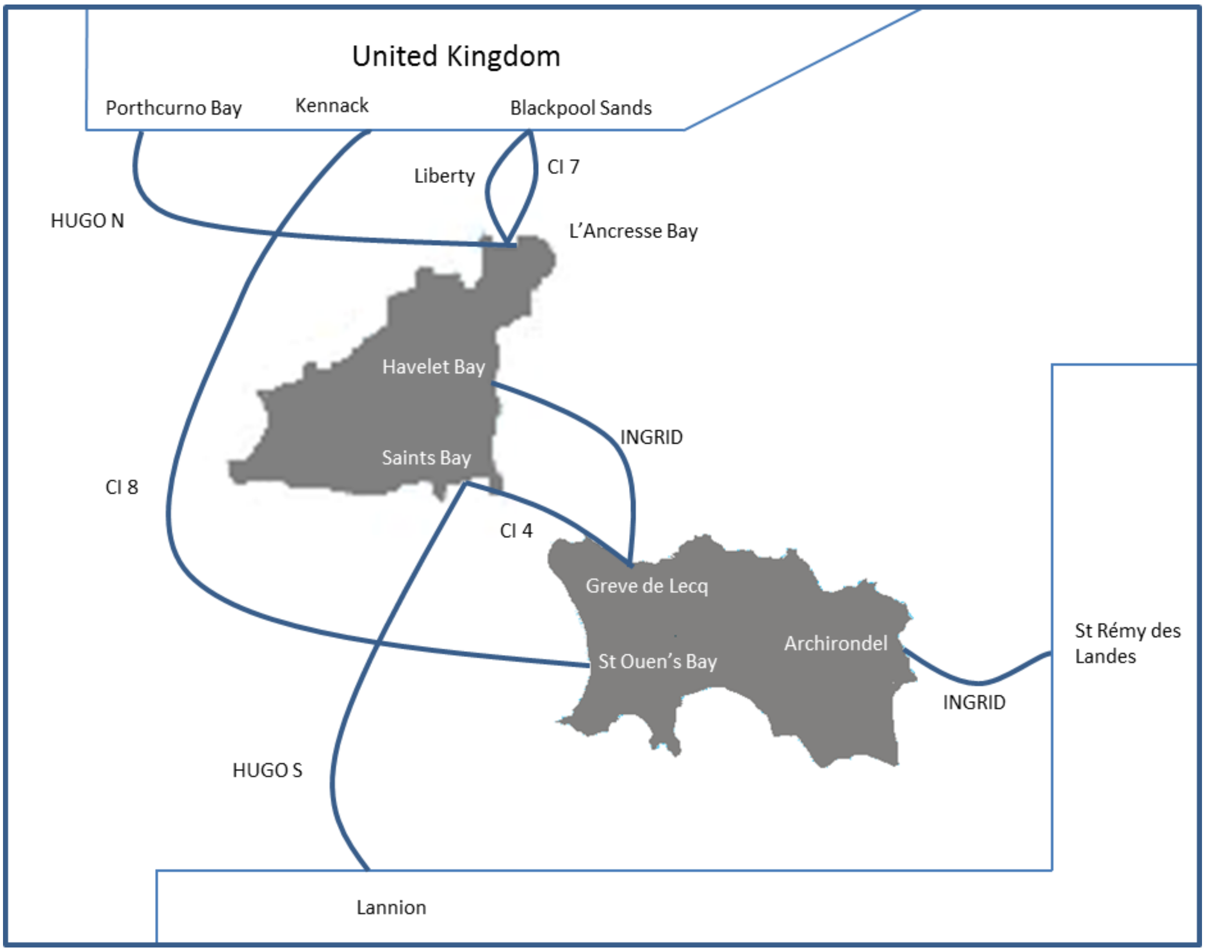
Off-Island links

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 37 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 37 – 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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	69.7	75.4	70.3	69.0	64.1	61.4	61.6	63.1	69.6
Jersey	140.3	144.4	98.2	97.8	101.9	101.2	105.9	104.1	107.8
Channel Islands	**210.0**	**219.8**	**168.5**	**166.8**	**166.0**	**162.6**	**167.5**	**167.2**	**177.4**

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	235	237	236	227	227	222	212	211	209
Jersey	415	464	433	505	506	554	592	583	545
Channel Islands	**650**	**701**	**669**	**732**	**733**	**776**	**804**	**794**	**754**

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	10.7	8.8	22.5	10.0	4.9	5.2	16.1	3.6	8.2
Jersey	24.8	22.4	21.3	22.6	23.3	19.6	18.7	17.5	13.1
Channel Islands	**35.5**	**31.2**	**43.8**	**32.6**	**28.2**	**24.8**	**34.7**	**21.1**	**21.3**

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	52.3	51.6	36.5	36.6	36.0	35.7	34.0	33.9	33.9
Jersey	59.1	36.5	55.9	58.3	55.9	47.9	47.4	48.0	48.1
Channel Islands	**111.4**	**88.2**	**92.5**	**95.0**	**91.9**	**83.6**	**81.5**	**81.9**	**82.1**

Table A5 – Number of fixed line minutes, millions

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	84.9	76.9	73.6	72.1	70.2	68.2	62.3	67.0	54.9
Jersey	168.3	140.4	128.7	120.1	110.8	99.0	87.4	96.9	72.8
Channel Islands	**253.2**	**217.3**	**202.3**	**192.2**	**181.0**	**167.2**	**149.8**	**163.9**	**128.7**

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	22.8	23.5	23.8	23.2	24.0	24.4	24.9	25.3	25.9
Jersey	35.0	36.4	36.1	35.9	37.2	37.9	38.4	39.7	40.7
Channel Islands	**57.8**	**59.9**	**59.9**	**59.1**	**61.2**	**62.3**	**63.3**	**65.0**	**66.6**

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

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

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	585	495	571	575	642	622	705	760	635
Jersey	922	810	1030	1061	1017	937	1005	745	694
Channel Islands	**1507**	**1305**	**1601**	**1636**	**1659**	**1559**	**1710**	**1505**	**1329**

Table A9 – Number of active mobile subscriptions in the Channel Islands, thousands

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	64.9	68.5	71.2	71.2	68.8	71.3	72.0	71.6	71.5
Jersey	112.5	119.0	122.7	121.8	120.9	125.9	127.1	124.3	124.1
Channel Islands	**177.4**	**187.5**	**193.9**	**192.9**	**189.7**	**197.2**	**199.1**	**195.9**	**195.6**

Table A10 – Number of pre-paid mobile subscriptions in the Channel Islands, thousands

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	27.2	30.0	30.8	29.5	26.4	26.3	26.1	23.6	22.9
Jersey	50.5	52.5	53.8	49.6	46.5	47.1	45.6	38.9	38.0
Channel Islands	**77.7**	**82.4**	**84.7**	**79.2**	**72.9**	**73.4**	**71.7**	**62.6**	**60.9**

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

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	37.7	38.6	40.4	41.7	42.4	45.0	45.9	48.0	48.6
Jersey	62.0	66.6	68.8	72.1	74.4	78.8	81.5	85.3	86.1
Channel Islands	**99.7**	**105.2**	**109.2**	**113.8**	**116.8**	**123.8**	**127.4**	**133.3**	**134.7**

Table A12 – Levels of mobile number switching, % of mobile subscribers

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Guernsey	1.8	3.5	1.9	1.6	2.8	2.8	2.5	2.3	3.2
Jersey	3.0	4.5	3.4	2.4	3.7	3.1	2.5	2.0	2.2