Statistics Jersey

Telecommunications Statistics and Market Report 2024

June 2025

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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 and Jersey. It covers the calendar year 2024 and is based primarily on data submitted by the licensed telecommunications operators during the first half of 2025. 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 4.0% in 2024 to £86.55 in Guernsey, and by 1.5% to £82.17 in Jersey
- Total **turnover** decreased in Guernsey by 5.3% to £71.4m in 2024 and increased by 6.5% to £120.0m in Jersey
- **Employment** within the telecommunication sector decreased in Guernsey by 4.7%, to 223 full-time equivalent staff in 2024, and in Jersey by 1.8% to 497 full-time equivalent staff
- In 2024, both Islands showed a decline in the number of **fixed call network minutes** (Guernsey by 23.1% and Jersey by 14.6%), continuing the decreasing trend since 2020
- **Broadband penetration rates** in both Islands were higher than the OECD average (36.3 subscriptions per 100 inhabitants): Guernsey had 41.6 subscriptions per 100 inhabitants and Jersey 42.3 (the same as the UK 42.3)
- **Broadband data usage** is up in both islands, but it remains below the UK average (531 GB/month). Guernsey subscribers used an average of 400 GB per month (a 12.2% increase from 2023), while Jersey subscribers averaged 431 GB per month (an 8.8% increase from 2023)
- Meanwhile, **text volumes** have continued to fall in both Islands, decreasing by 7.9% in Guernsey and by 11.2% in Jersey
- The total **number of mobile call minutes** decreased by 8.9% in Guernsey in 2024 and 15.8% in Jersey
- **Mobile data volumes** increased by 5.5% in Guernsey and 5.7% in Jersey
- Total **mobile revenue** has increased in both Islands since 2023: 1.5% in Guernsey and 1.7% in Jersey

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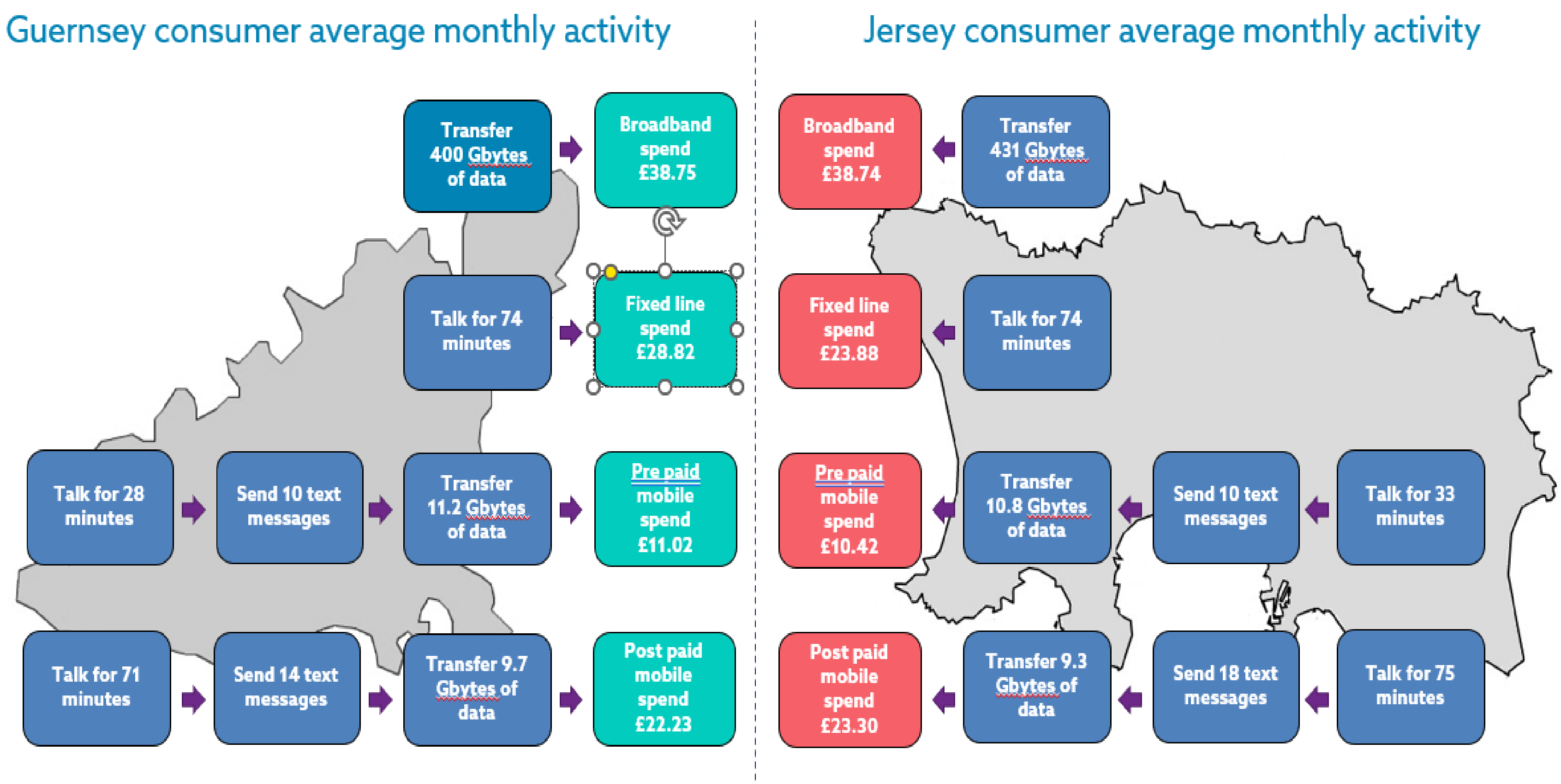
Consumer snapshot 2024



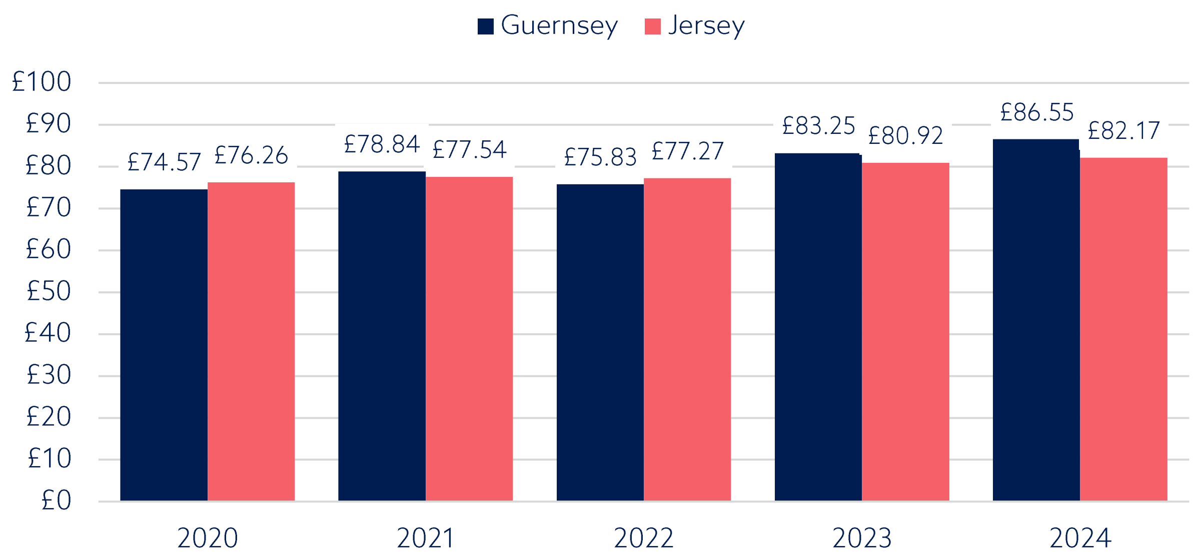
Average monthly consumer spend on telecoms services

Average monthly consumer spend on telecoms services in the Channel Islands was £83.94 in 2024; up from £81.94 in 2023. This includes expenditure on broadband, fixed line and mobile services.

As shown in Figure 1, average monthly spend in Guernsey increased by 4.0% to £86.55 in 2024, and in Jersey increased by 1.5% to £82.17 compared to 2023.[1]

Figure 1: Average consumer spend on telecoms services has been increasing since 2022

Average consumer spend in £ on telecoms services in the Channel Islands, 2020 to 2024



Consumer data usage

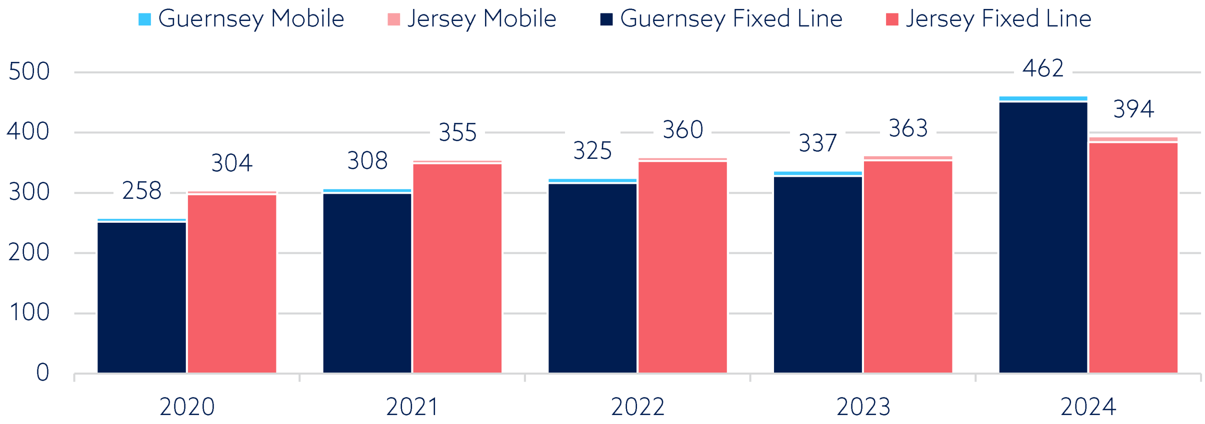
Average monthly data download usage by consumers in the Channel Islands was 387 Gbytes in 2024; an increase of 9.5% from 353 Gbytes in 2023.

As shown in Figure 2, average data download usage increased in Guernsey by 11.1% to 375 Gbytes in 2024 compared to 2023. This was made up of 10 Gbytes of mobile data and 365 Gbytes of fixed line broadband download data. In Jersey, average data usage increased by 8.5% to 394 Gbytes; this was made up of 10 Gbytes of mobile data and 384 Gbytes of fixed line broadband download data.

[1] 2023 data has been updated since the 2023 report was published due to updated information received from providers

Figure 2: Average data download has continued to increase over the past five

Average data download usage in the Channel Islands, 2020 to 2024

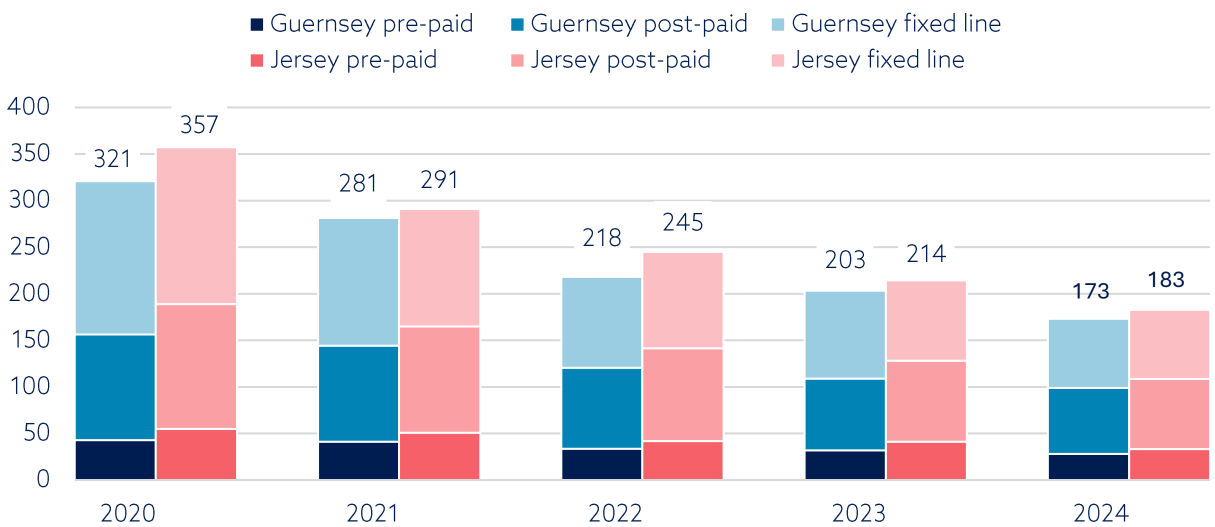


Consumer voice and message use

In 2024, Jersey consumers averaged 74 minutes of fixed line calls, 33 minutes of pre-paid mobile calls, and 75 minutes of post-paid mobile calls per month. The total call minutes across these three categories fell by 14.7% compared to 2023. In Guernsey, consumers averaged 74 fixed line, 28 pre-paid mobile, and 71 post-paid mobile call minutes per month, representing a total decrease of 14.5% from the previous year.

Figure 3: Average monthly call minutes has continued to decrease over the past five year

Average monthly fixed, pre- and post-paid call minutes made in the Channel Islands, 2020 to 2024

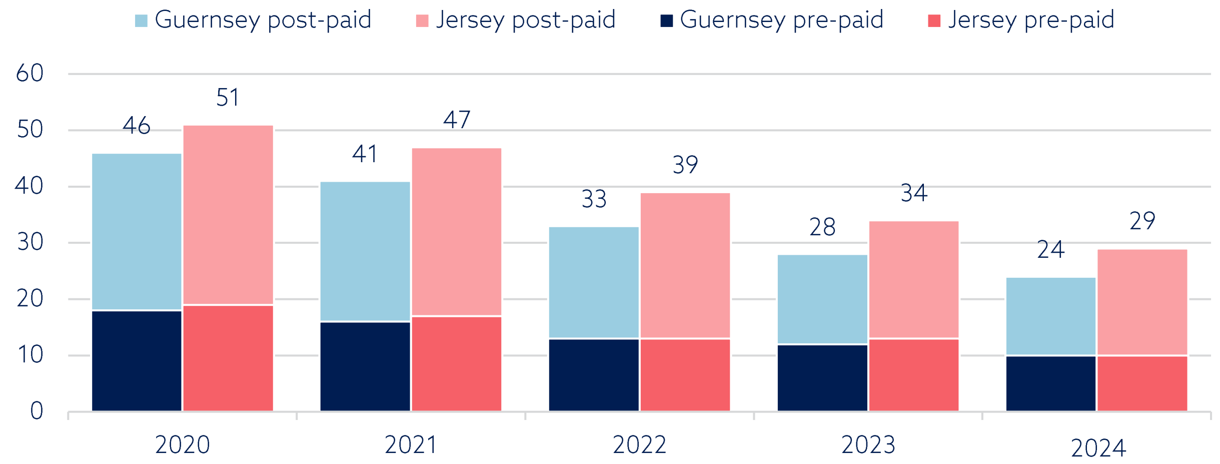


In 2024, Jersey consumers sent an average of 10 pre-paid and 18 post-paid SMS messages per month. The combined total of messages sent decreased by 15.1% compared to 2023. In Guernsey, the equivalent figures were 10 pre-paid and 14 post-paid messages per month, with the total showing a 14.4% decline from the previous year.

As Figure 4 shows, the average number of pre-paid and post-paid messages sent per subscriber in both Islands has been decreasing since 2020.[2]

Figure 4: Average monthly SMS messages has continued to decrease over the past five years

Average monthly pre- and post-paid SMS messages in the Channel Islands, 2020 to 2024



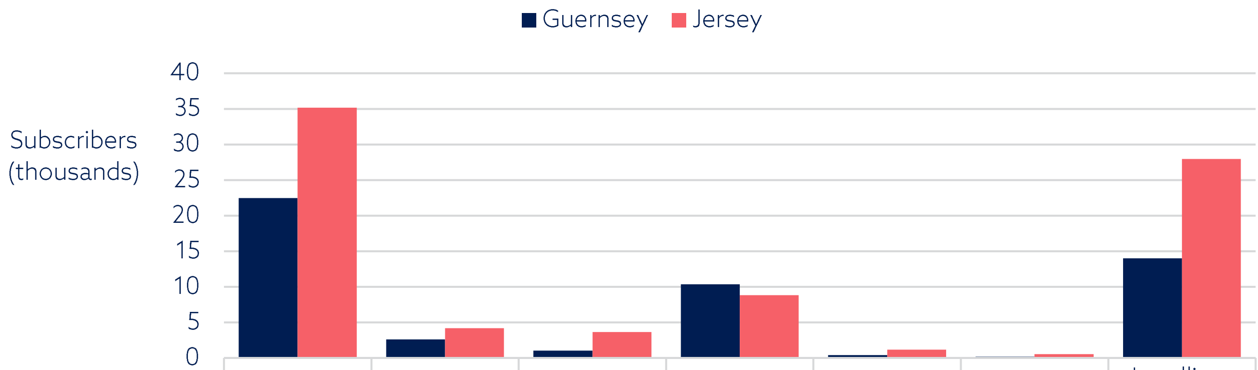
[2] 2023 data has been updated since the 2023 report was published due to updated information received from providers

Subscriptions

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

Figure 5: Mobile only packages were the most popular package type in the Channel Islands

Subscriptions by package type in the Channel Islands, 2024



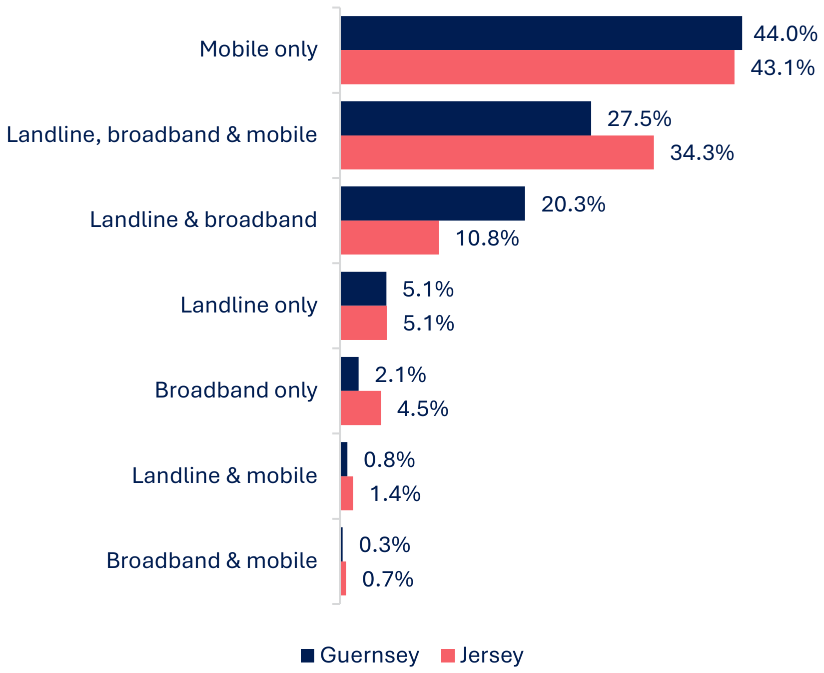
	Mobile only	Landline only	Broadband only	Landline & broadband	Landline & mobile	Broadband & mobile	Landline, broadband & mobile
Guernsey	22,444	2,590	1,047	10,331	422	161	14,008
Jersey	35,149	4,172	3,651	8,808	1,178	543	27,964

In the Channel Islands, just under half (48%) of subscriptions were bundles, a slight increase on 2023 (45%). In Jersey, 47.3% of subscriptions were part of a combined package; the figure in Guernsey was 48.9%.

Figure 6 shows the proportions of each package type in Guernsey and Jersey.

Figure 6: Mobile only packages made up the majority of subscriptions in both islands

Subscriptions by package type in Guernsey and Jersey, 2024



Just over two-fifths of subscriptions in both Islands were mobile only subscriptions.

Packages containing landline, broadband and mobile had the largest number of subscribers in both islands: 27.5% in Guernsey and 34.3% in Jersey.

In Guernsey, one fifth (20.3%) of subscriptions were for a landline & broadband bundle, compared to 10.8% of subscriptions in Jersey.

Statistics Jersey

Economic statistics for the telecommunications sector

£71 million

Total revenues from Guernsey-based customers

£7.7 million

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

223 staff employed

In Guernsey in the supply of telecommunication services to Guernsey customers as at the end of 2024

£17 million

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

576

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

£120 million

Total revenues from Jersey-based customers

£14.3 million

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

497 staff employed

In Jersey in the supply of telecommunications services to Jersey customers as at the end of 2024

£20 million

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

509

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 £191.4m in 2024, up 1.8% from £188.0m in 2023. Turnover includes revenues associated with Channel Island subscribers while on and off the Islands, plus revenue from visitors to the Islands in 2024.

As shown in Figure 7, total turnover in Guernsey decreased by 5.3% to £71.4m in 2024. In Jersey, total turnover increased by 6.5% to £120.0m.

Figure 7: Total turnover continued to increase in Jersey, while Guernsey experienced a decrease

Total turnover of the telecommunications industry in the Channel Islands, 2020 to 2024

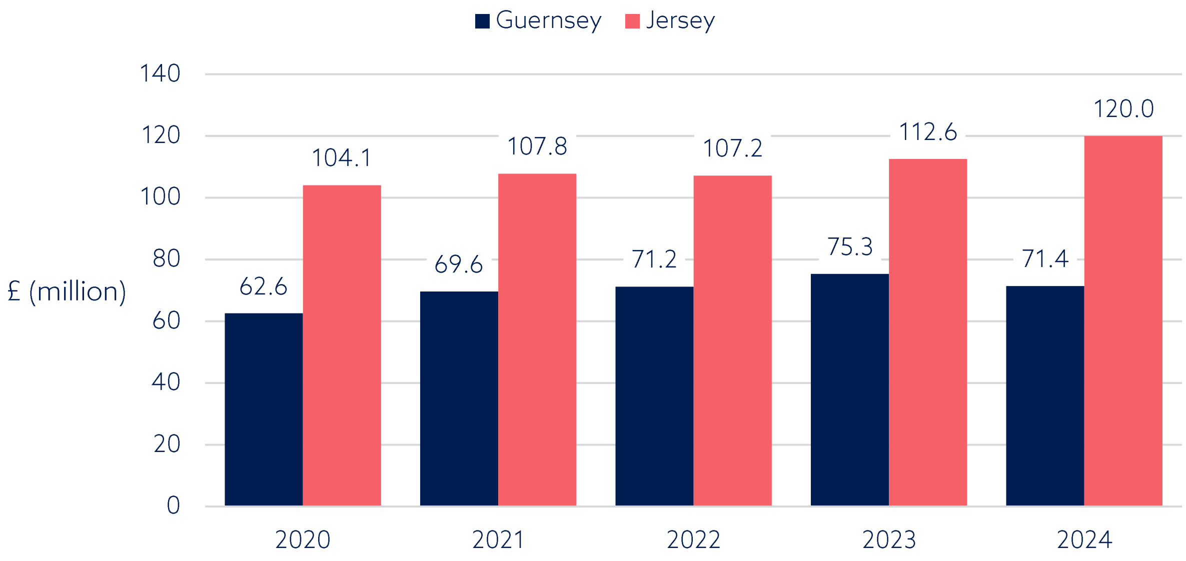
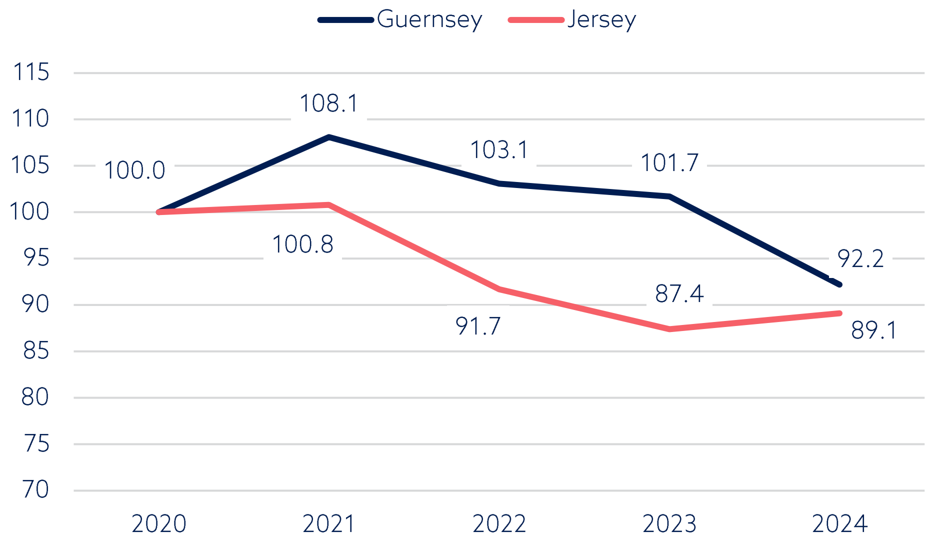


Figure 8 shows the trend of turnover in real terms over time, with the index set to 100.0 in 2020.

Figure 8: Real terms turnover in both islands has decreased since 2020, although Jersey has shown a slight increase since 2023

Index of total real-terms turnover in the Channel Islands, 2020 to 2024

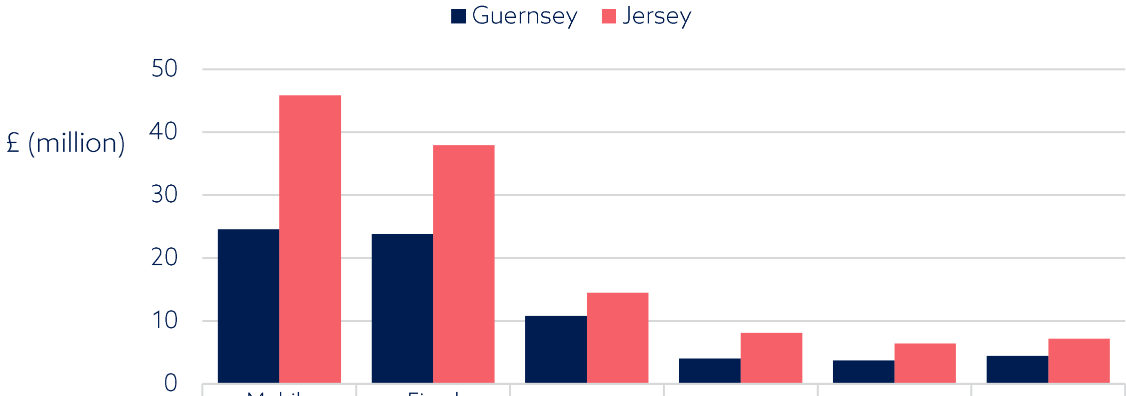


Although total turnover in Jersey has increased in nominal terms since 2020, it has declined in real terms due to a sharp downturn after 2021. However, 2024 saw a modest recovery. In Guernsey, turnover in real terms has fluctuated over the years but still shows a decline since 2023.

Figure 9 shows the total turnover segmented into the different types of telecommunications activity in 2024. The fixed and mobile figures include revenues from both voice and data services, and for both retail and corporate customers.

Figure 9: Mobile network retail services make up the largest share of telecoms turnover in the Channel Islands

Total turnover by type of telecommunications activity, 2024



	Mobile network retail	Fixed network retail	Leased lines	Wholesale	Data centre	Other
Guernsey	£24,566,594	£23,794,293	£10,827,701	£4,039,426	£3,716,684	£4,436,844
Jersey	£45,843,817	£37,940,169	£14,491,582	£8,087,942	£6,413,750	£7,191,372

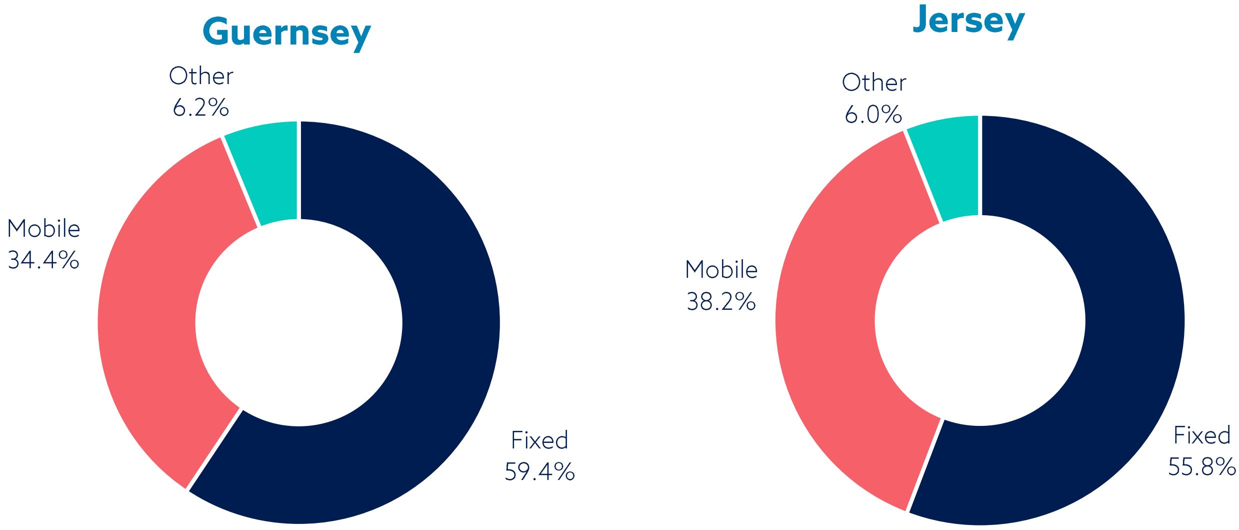
Note 1: The turnover figures within the chart above should be considered as the total turnover amounts for each activity. Definitions for revenue within each individual section of the report differ from the above.
Note 2: Wholesale is defined as those products sold on to other retailers for resale.

In Guernsey, the highest turnover was generated from mobile network retail which accounted for 34.4% of the total turnover. Mobile network retail also generated the highest turnover in Jersey, representing 38.2% of the total.

Figure 10 summarises total turnover by key service categories, with "fixed" combining fixed network retail, leased lines, wholesale and data centres.

Figure 10: The fixed service category had the biggest share of turnover in both islands

Total turnover by key service category, Guernsey and Jersey, 2024



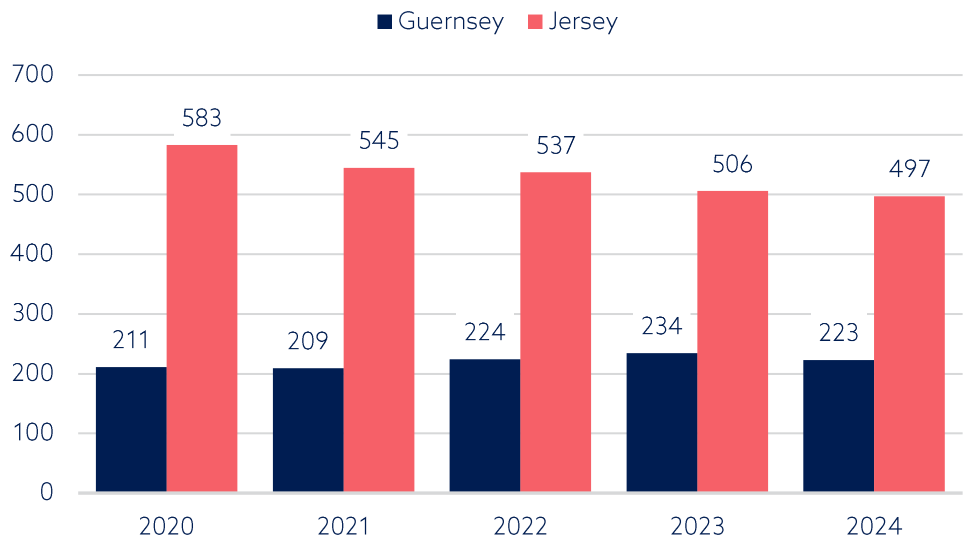
The fixed sector accounted for the biggest share of turnover in both Guernsey and Jersey in 2024. In Guernsey, it accounted for 59.4% of total turnover, whilst in Jersey it accounted for 55.8%. In Jersey this represented an increase of 11.5% on 2023 while Guernsey remained relatively unchanged (a decrease of 0.1%). Mobile sector revenues also increased in Jersey (8.5%), and Guernsey (0.2%).

Employment in the telecommunications sector

Figure 11 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 2020. Across the Islands, the sector employed 720 full time equivalent staff at the end of 2024, representing a decrease of 20 staff and continuing the overall downward trend seen since 2020.

Figure 11: Employment in Jersey's telecommunications sector has decreased annually since 2020, while in Guernsey it has remained fairly stable

Full time equivalent employees in the telecommunications sector, 2020 to 2024



In 2024, there were 2.2 times as many staff employed in the telecommunications sector in Jersey than in Guernsey. Since 2020, the number of employees in the telecommunications sector in Jersey has decreased by 14.8%, while the number of employees in Guernsey has increased by 5.7%.

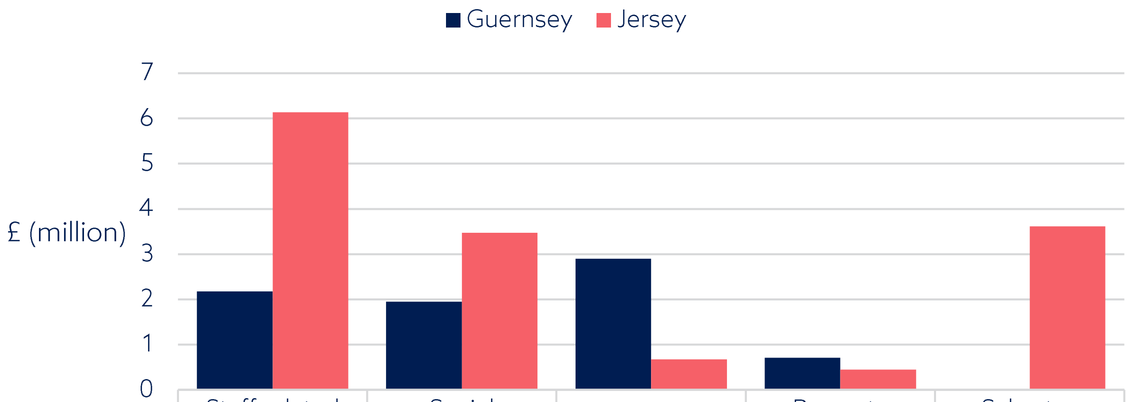
![Statistics Jersey logo]

Taxation contributions

The telecommunications sector contributed £22.1m in taxation in 2024 (£21.6m in 2023); 7.7m in Guernsey (£6.9m in 2023) and £14.3m in Jersey (£14.7m in 2023).

Figure 12: Jersey telecommunications contributed almost double the amount of taxation as the telecommunications sector in Guernsey

Contributions by type of taxation in the Channel Islands, 2024



	Staff related (tax)	Social security	Corporate	Property related	Sales tax (GST)
Guernsey	£2,173,175	£1,947,368	£2,897,974	£706,270	0
Jersey	£6,136,332	£3,474,561	£669,978	£445,454	£3,613,835

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

Capital investment

Figure 13 shows the levels of capital investment in telecommunications in Guernsey and Jersey in the years 2020 to 2024.

Figure 13: Capital investment in Guernsey telecommunications has increased since 2022, whilst Jersey experienced a decrease since 2023

Capital investment in the telecommunications industry in the Channel Islands, 2020 to 2024

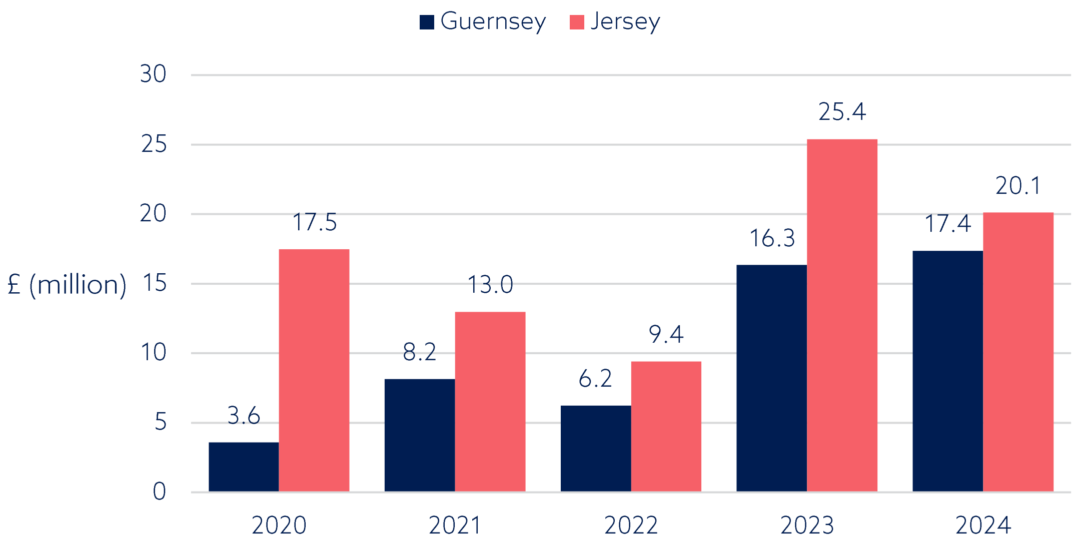


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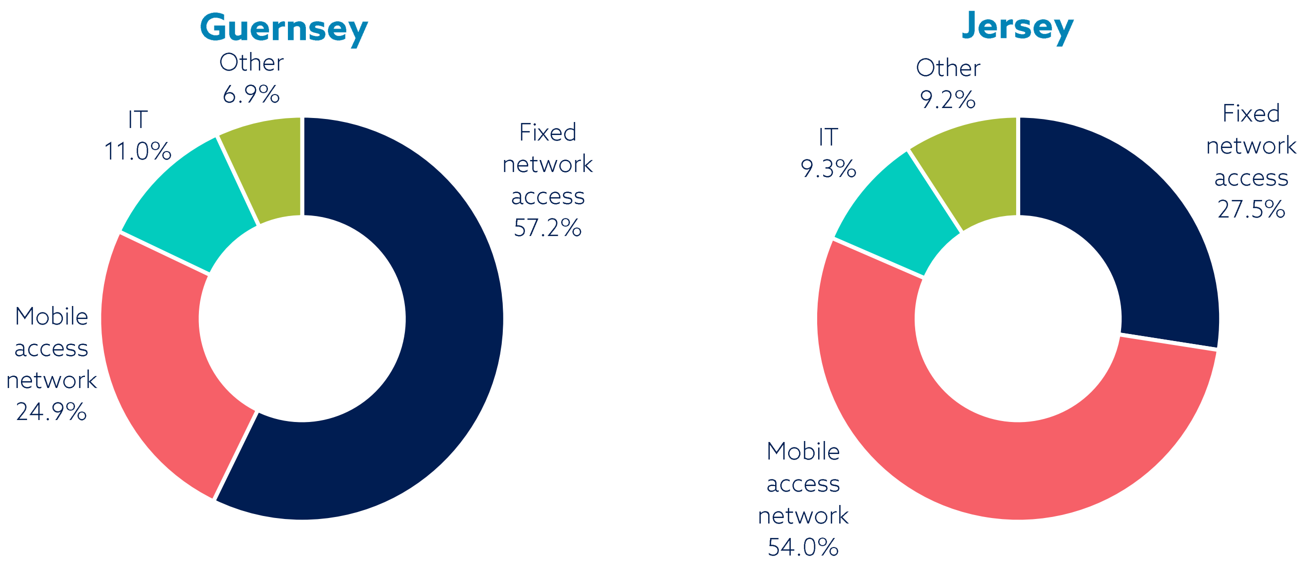
Figure 14: Fixed network access accounted for the largest proportion of capital investment in Guernsey, whilst mobile access network was the largest in Jersey
Percentage of capital investment by type, Guernsey and Jersey, 2024



Capital investment in the Channel Islands has fluctuated over the years. Following a significant rise in capital investment across both islands in 2023, Guernsey recorded a smaller increase of 6.3% in 2024, with investment rising from £16.3 million to £17.4 million, primarily driven by spending in the fixed network and other sectors. In contrast, Jersey experienced a decline of 20.8%, with capital investment falling from £25.4 million in 2023 to £20.1 million in 2024.

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.

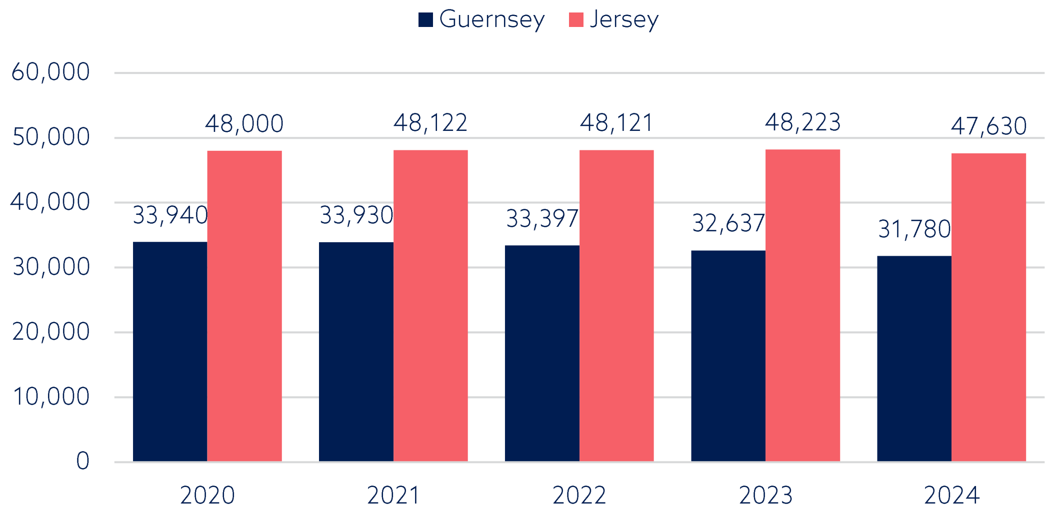
Fixed line telephony market

Total number of lines and subscriptions

Figure 15 shows the number of fixed lines in the Islands during the period 2020 to 2024. In 2024, the number of fixed lines and subscriptions decreased in both islands: Jersey subscriptions by 1.2% to 47,630, and Guernsey subscriptions by 2.6% to 31,780.

Figure 15: The number of fixed lines and subscriptions in 2024 was the lowest over the past five years

Number of retail fixed lines and subscriptions in the Channel Islands, 2020 to 2024



In both islands, 97.2% of retail subscriptions were for consumer products,[3] 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.

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

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 2024. Subscription to WLR and carrier select services have increased in both Islands compared to 2023.

Table 1: Subscriptions to alternative carriers

	Guernsey	Jersey
Carrier select	8,758	210
Wholesale Line Rental	6,664	12,988
Total	**15,422**	**13,198**

Fixed telephony minutes

Figures 16 and 17 show the numbers of minutes carried by operators in Guernsey and Jersey annually, between 2020 and 2024. For 2024, 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 number of fixed lines since 2020. Compared to 2023, fixed line call minutes decreased in Guernsey by 23.1% to 28.4 million and in Jersey by 14.6% to 42.6 million.

Figure 16: The number of fixed line minutes has continued to decrease in Guernsey since 2020

Number of fixed line minutes in Guernsey by operator, 2020 to 2024

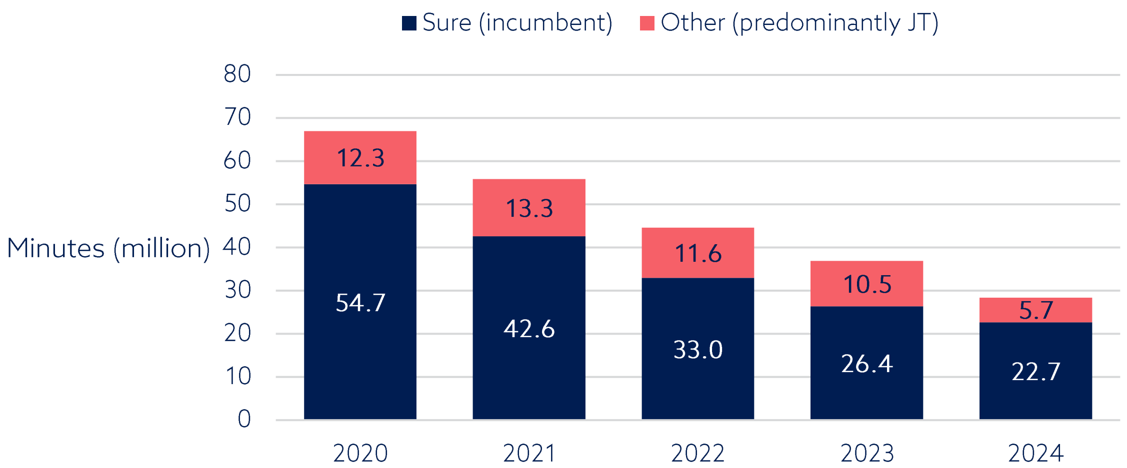


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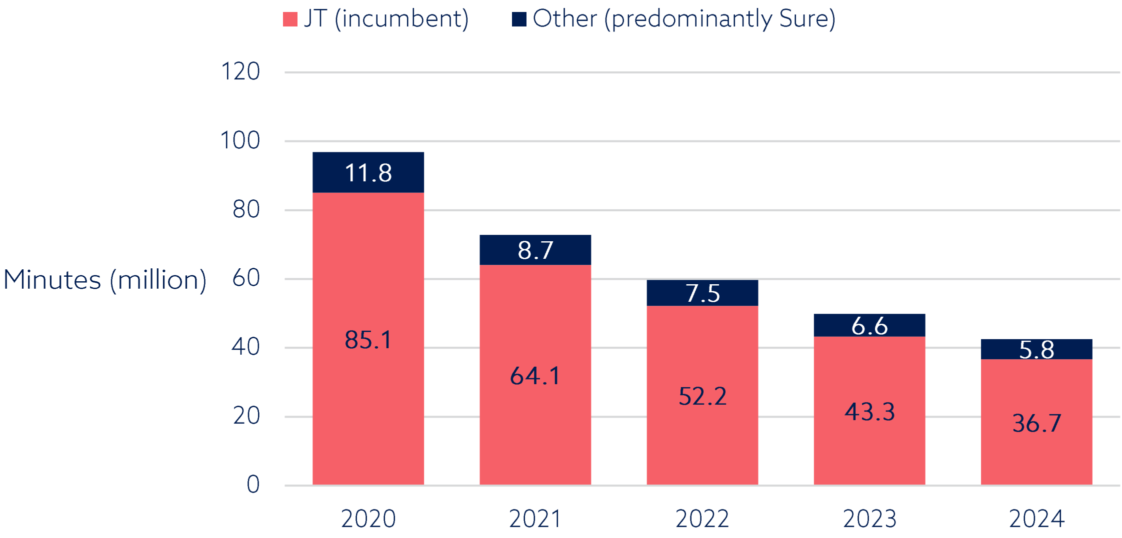
Figure 17: The number of fixed line minutes has continued to decrease in Jersey since 2020

Number of fixed line minutes in Jersey by operator, 2020 to 2024



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 2024, both islands experienced a decrease since 2023.

Table 2: Fixed and wireless fixed retail line connections per 100 inhabitants, 2020 to 2024

	Guernsey	Jersey
2020	54	46
2021	53	47
2022	53	47
2023	51	47
2024	49	46

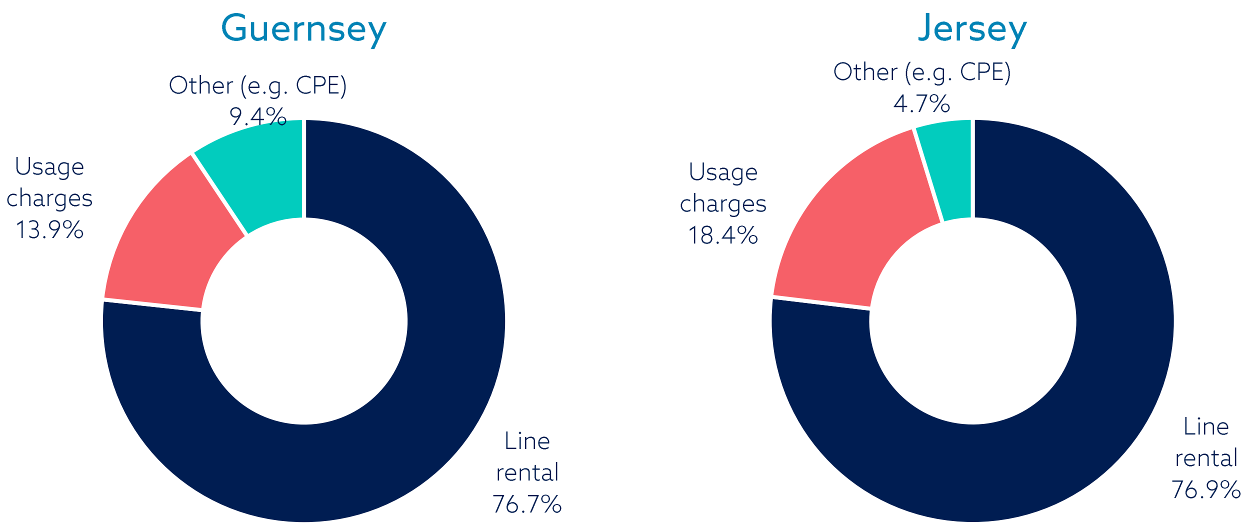
Revenues

Excluding broadband and leased line services, revenues associated with fixed networks in 2024 were £11.0m in Guernsey (£11.1m in 2023) and £13.6m in Jersey (£13.4m in 2023).

Figure 18 shows these revenue totals broken down into line rental, usage charges and other charges e.g. for customer premises equipment and support services (CPE) for each island.

Figure 18: Line rental accounted for the biggest share of fixed network revenues in both islands

Fixed network revenues, Guernsey and Jersey, 2024



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 2024 was £345.90 (£28.82 per month), showing an increase of 2.0% compared to 2023. Excluding GST, the equivalent annual figure for 2023 in Jersey was £286.51 (£23.88 per month), an increase of 2.7% from 2023. Charges for services such as broadband are in addition to these.

Fixed network broadband market

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

While most broadband subscribers can be categorised as residential users rather than business users, it is difficult to draw a clear distinction as small businesses tend to use services primarily designed for residential use. The proportion of subscribers using business/enterprise products[4] in Jersey is 5.8%, while in Guernsey it is 4.2%.

Subscriptions and penetration rates

Table 3 shows numbers of fixed broadband subscriptions and overall broadband subscriptions (including mobile substitutions) for Guernsey and Jersey 2020 to 2024. In 2024, fixed line broadband subscriptions in Guernsey recorded a slight increase of 0.2% to 26,975, while Jersey experienced a 2.0% rise to 43,856.

Table 3 – Numbers of fixed broadband subscriptions in the Channel Islands, 2020 to 2024

	Guernsey		Jersey	
	Excluding data only mobile	Including data only mobile	Excluding data only mobile	Including data only mobile
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
2024	26,975	28,237	43,856	47,867

Since 2020, there has been a gradual upward trend in broadband subscriptions (excluding data only mobile) in both Islands.

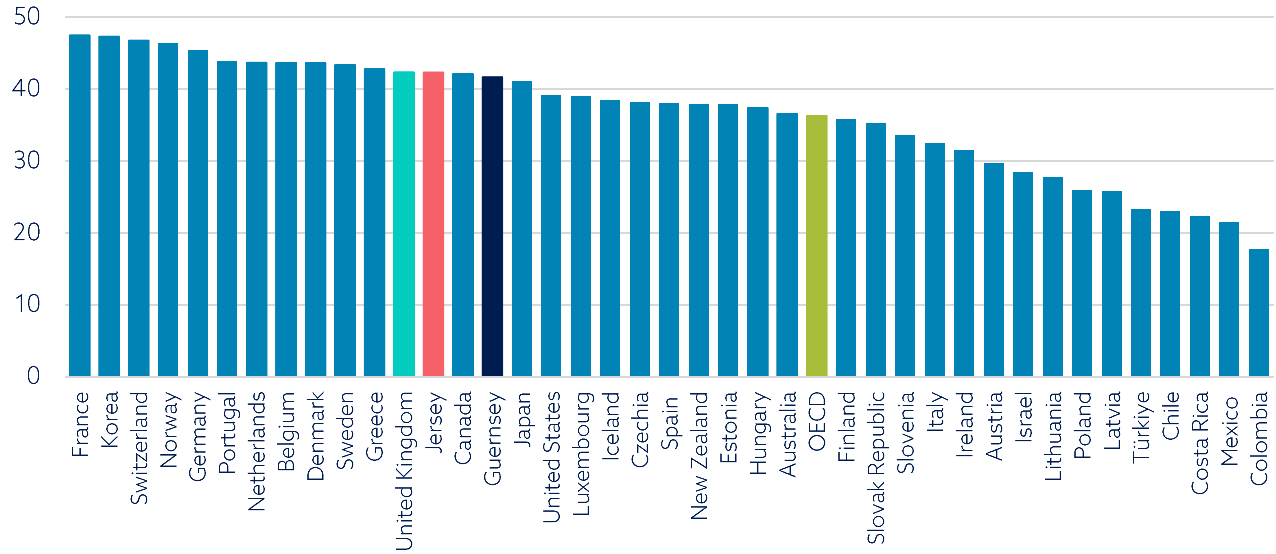
In Jersey, JT provides some subscriptions with capped data allowance: these make up 7.5% of subscriptions in the Island. In Guernsey, all subscriptions have unlimited data allowance.

[4] These are products targeted at businesses, be it small to medium enterprises or large corporates

As illustrated in Figure 23, the Islands have penetration rates higher than OECD average of 36.3 subscriptions per 100 inhabitants. In 2024, Guernsey had 41.6 subscriptions per 100 inhabitants, while Jersey had 42.3. When data-only mobile access is included, penetration rates are 43.6 for Guernsey and 46.2 for Jersey.

Figure 19: The Channel Islands fixed broadband subscriptions per 100 inhabitants were higher than the OECD average

Jersey, Guernsey and OECD fixed and wireless broadband subscriptions per 100 inhabitants



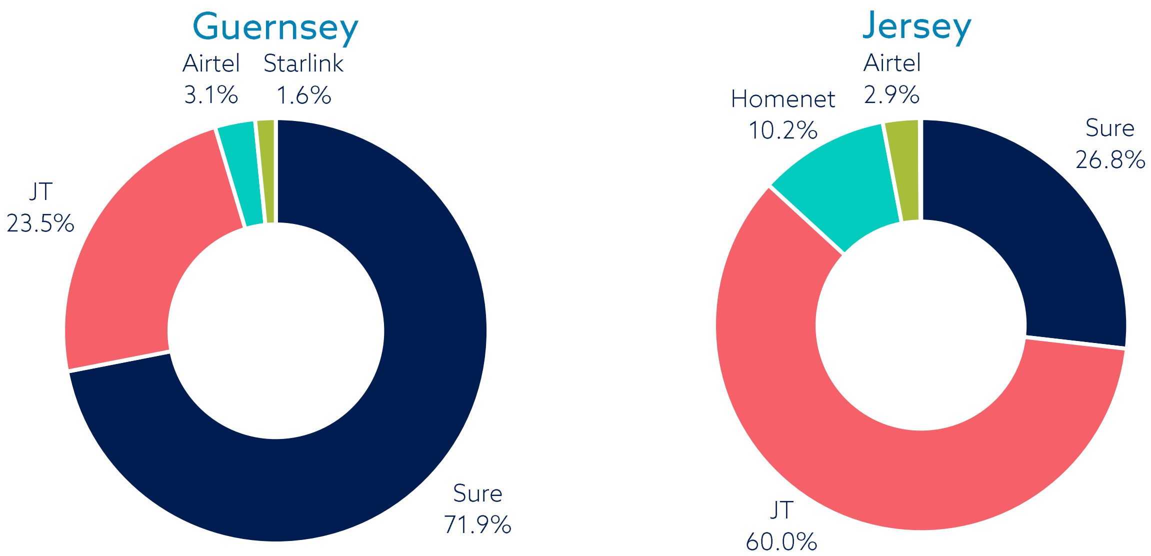
Sources: Statistics Jersey & OECD broadband statistics (Broadband statistics | OECD)

Market share by numbers of fixed broadband subscriptions

Figure 20 shows 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 20 – Sure had the largest fixed network broadband market share in Guernsey, whilst JT had the largest in Jersey

Fixed network broadband market share by number of subscriptions, Guernsey and Jersey[5], 2024



[5] Market share for Starlink was too small to be included in Figure 20s Jersey chart

Statistics Jersey

Table 4 shows historic market shares in the fixed broadband market in Guernsey and Jersey between 2020 and 2024.

Table 4 – Fixed broadband market share (%) in Guernsey and Jersey, 2020 to 2024

	Guernsey			Jersey		
	Sure	JT	Other	Sure	JT	Other
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
2024	72	23	5	27	60	13

In Guernsey, Sure and JT collectively lost 2 percentage points of market share to other operators (Airtel and Starlink).

In Jersey, Sure and JT collectively also lost 2 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.

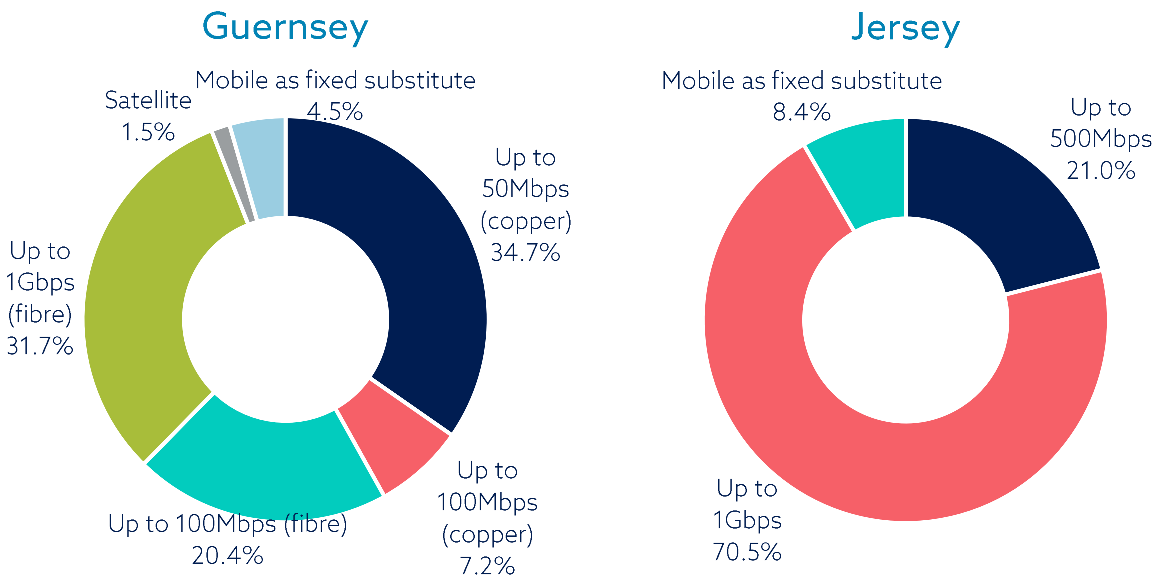
Guernsey connections are mainly copper based, with subscribers predominantly able to access services via xDSL technologies with advertised download speeds of up to 20Mbps and up to 100Mbps. However, fibre connections have begun to be rolled out across the Island. In Guernsey, Sure owns all the physical 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.

Figure 21 shows the proportions of fixed network broadband subscriptions by download speed on the historically reported basis of 'up to' speeds[6] 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 – Jersey had double Guernsey's proportion of fixed broadband subscriptions with up to 1Gbps download speed

Fixed broadband subscriptions by download speed, Guernsey and Jersey, 2024



In Guernsey, 62.3% of subscriptions have download speeds of up to 50 and 100 Mbps, a decrease of 19.3% compared to 2023.

The proportion of broadband subscriptions in Jersey with download speeds of up to 500 Mbps and 1 Gbps remains similar to 2023 at 91.5%.

[6] 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. However, based on the available data, it can be estimated that the total volume of data downloaded and uploaded in 2024 by broadband subscribers in Guernsey increased by 12.4% to 129.5 million Gbytes. In Jersey, the estimated volume of data in 2024 increased by 11.0% to 226.6 million Gbytes.

On average, fixed network broadband subscribers[7] (including mobile substitutions) in Guernsey each sent and received an average of 400 Gbytes of data per month in 2024 while subscribers in Jersey each sent and received an average of 431 Gbytes per month. The equivalent figures for 2023 were 357 Gbytes in Guernsey and 396 Gbytes in Jersey, demonstrating an increase (12.2% and 8.8% respectively). Jersey and Guernsey data usage in 2024 are well below the UK (531 Gbytes per month). [8]

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

Revenues

Total retail revenues in 2024 from fixed broadband services were £12.5m in Guernsey; up from £12.0m in 2023. Revenues in Jersey in 2024 have increased to £20.4m from £19.6m in 2023.

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 wished for a fixed monthly subscription. 97.9% of revenues were derived from basic subscriptions and 2.1% 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 and/or pay overage charges. Sure and Homenet sell subscriptions with unlimited usage, subject to fair usage policies. 96.8% of revenues in Jersey were derived from basic subscriptions and 3.2% from other sources.

[7] 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

[8] Connected Nations UK report 2024

Average revenue per subscription

Estimated[9] average revenue per fixed network broadband subscription in Guernsey was £464.95 for the year (£38.75 per month). This shows an increase of 4.5% compared to 2023.

The equivalent 2024 figures in Jersey were £464.86 for the year (£38.74 per month), an increase of 1.9% compared to 2023.

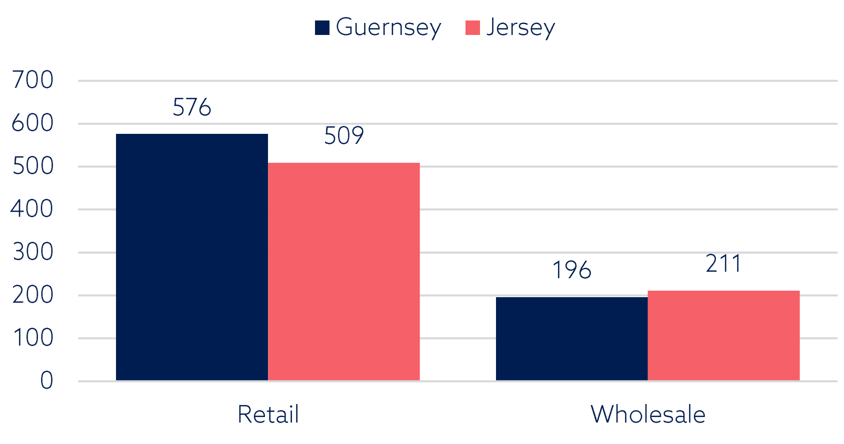
The above figures exclude revenues from associated line rental.

Leased line market

Leased lines[10] (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 22: There were more than twice as many retail leased lines as wholesale lines in the Channel Islands

Number of retail and wholesale leased lines in the Channel Islands, 2024



[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.

[10] Retail leased lines are those services provided to end users. Wholesale leased lines are those services provided to other communication providers

The number of retail leased lines has declined in both islands: in Guernsey falling from 593 in 2023 to 576 in 2024, and from 683 to 509 in Jersey. Wholesale leased lines saw a slight decrease in Guernsey, decreasing from 199 in 2023 to 196 in 2024, whilst in Jersey they increased to 211 from 191.

Table 5 – Numbers of leased lines by usage, 2024

	Guernsey			Jersey		
	On-island	Inter-island	Off-island	On-island	Inter-island	Off-island
Retail	490	18	68	406	22	81
Wholesale	167	2	27	141	0	70

Figure 23 shows the number of retail leased lines in the islands during the period 2020 to 2024.

Figure 23: The number of retail leased lines has declined in the Channel Islands since 2023

Number of retail leased lines in the Channel Islands, 2020 to 2024

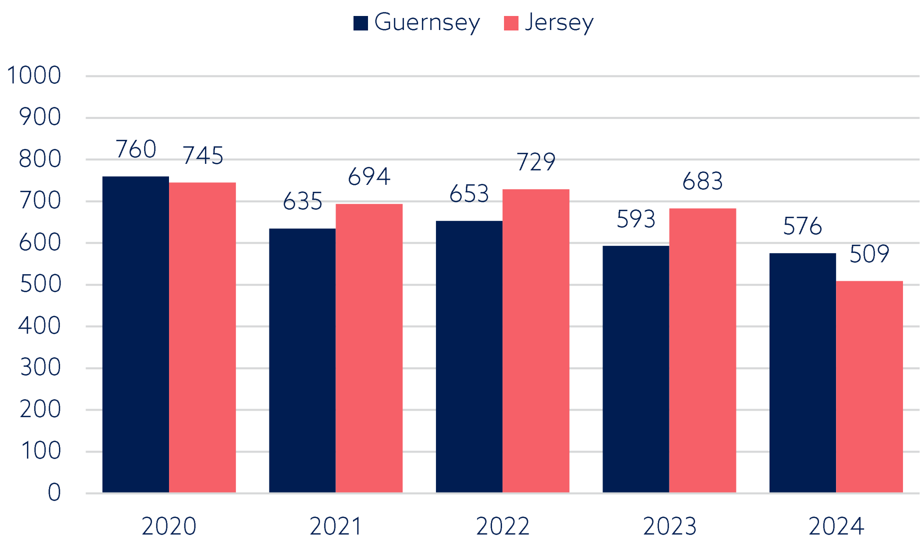
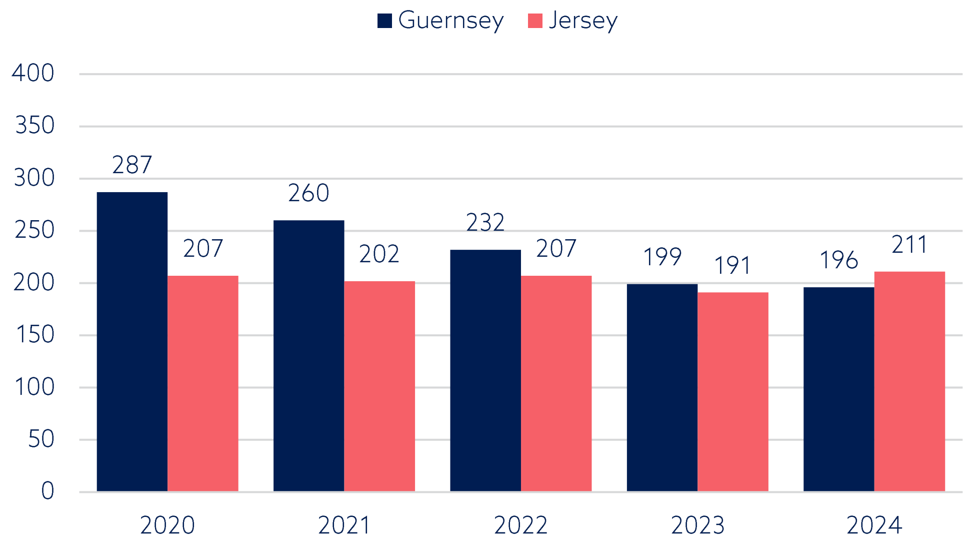


Figure 24 shows the number of wholesale leased lines in the islands during the period 2020 to 2024.

Figure 24: The number of wholesale leased lines has been declining in Guernsey since 2020

Number of wholesale leased lines in the Channel Islands, 2020 to 2024



Between 2020 and 2024, Guernsey experienced a consistent decrease in values, dropping from 287 in 2020 to 196 in 2024. However, this downward trend appears to have levelled off since 2023, with only a marginal decrease from 199 to 196. In contrast, Jersey's figures remained relatively stable, fluctuating slightly but overall increasing from 207 in 2020 to 211 in 2024.

Market share by numbers of leased line subscriptions

Figure 25 shows the retail market shares of the structured leased line providers in Guernsey and Jersey respectively by numbers of leased line subscriptions. In 2024, JT was the main retail provider in both Islands.

Figure 25 – JT was the main retail leased line provider in both Guernsey and Jersey
Retail leased line market share by number of subscriptions, Guernsey and Jersey, 2024

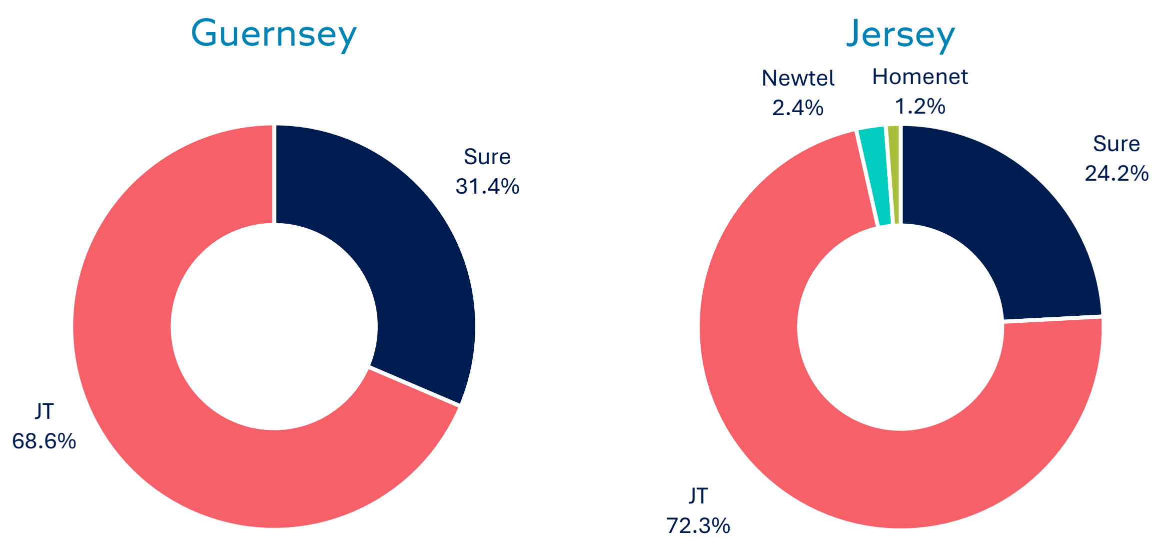
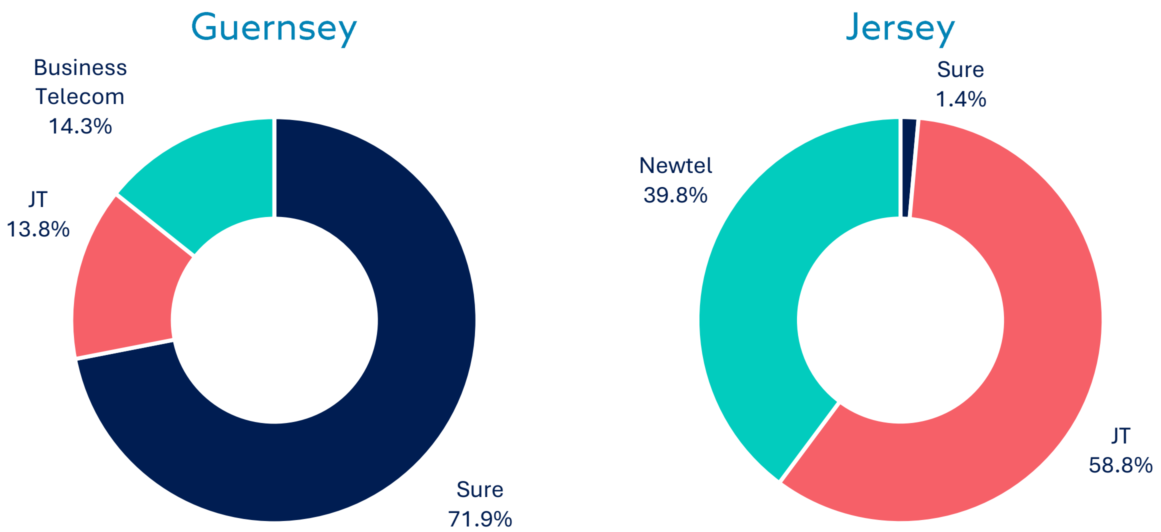


Figure 26 shows the wholesale market shares of leased line providers in Guernsey and Jersey by numbers of leased line subscriptions. In 2024, JT was the main wholesale provider in Jersey, while Sure was the main provider in Guernsey.

Figure 26 – Sure had the largest wholesale leased line market share in Guernsey, whilst JT had the largest in Jersey

Wholesale leased line market share by number of subscriptions, Guernsey and Jersey, 2024



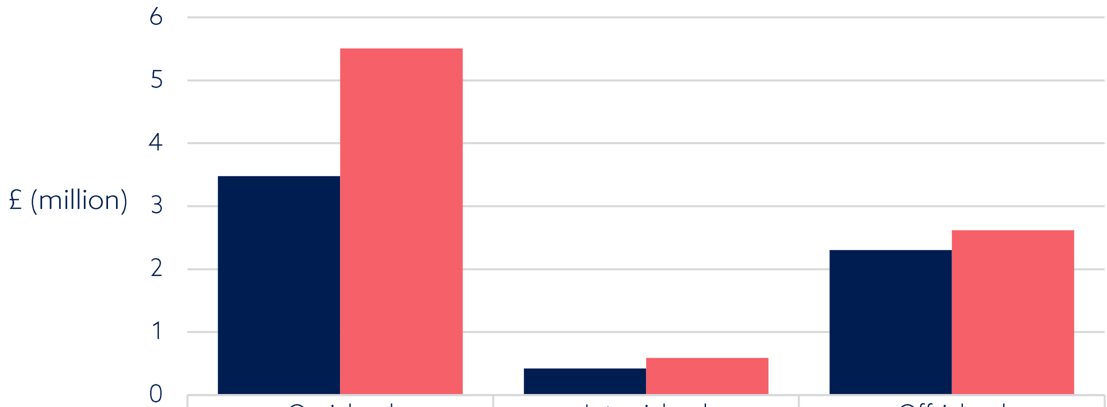
Leased line revenues

Total revenue from retail leased lines in Guernsey in 2024 was £6.2m, an increase from £5.7m in 2023, and £8.7m in Jersey in 2024, a decrease from £9.1m in 2023.

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

Figure 27: On-island retail leased lines generated the highest revenue across both islands

Revenues from retail leased lines by activity, 2024



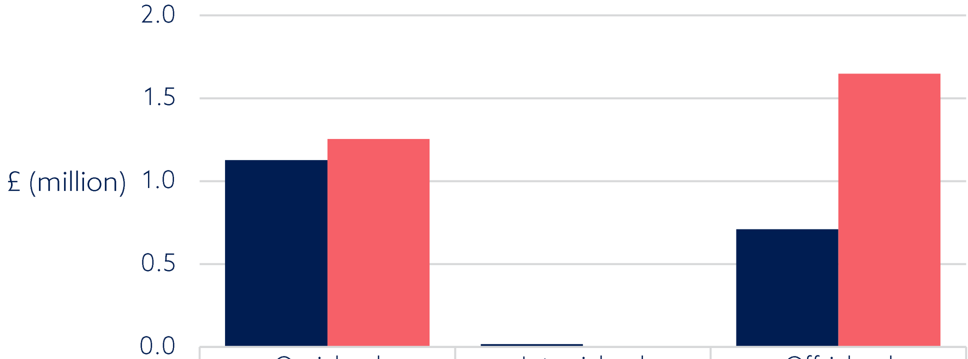
	On-island	Inter-island	Off-island
Guernsey	£3,479,594	£424,231	£2,302,449
Jersey	£5,505,994	£589,654	£2,620,362

Total revenue from wholesale leased lines in Guernsey in 2024 was £1.9m (£2.2m in 2023), and in Jersey in 2024 was £2.9m (£2.6m in 2023).

Figure 28 shows the breakdown of these totals by on-island, inter-island and off-island services.

Figure 28: Off-island wholesale leased lines generated the highest revenue in Jersey

Revenues from wholesale leased lines by activity, 2024



	On-island	Inter-island	Off-island
Guernsey	£1,127,261	£16,128	£709,696
Jersey	£1,254,686	£0	£1,648,451

Mobile market

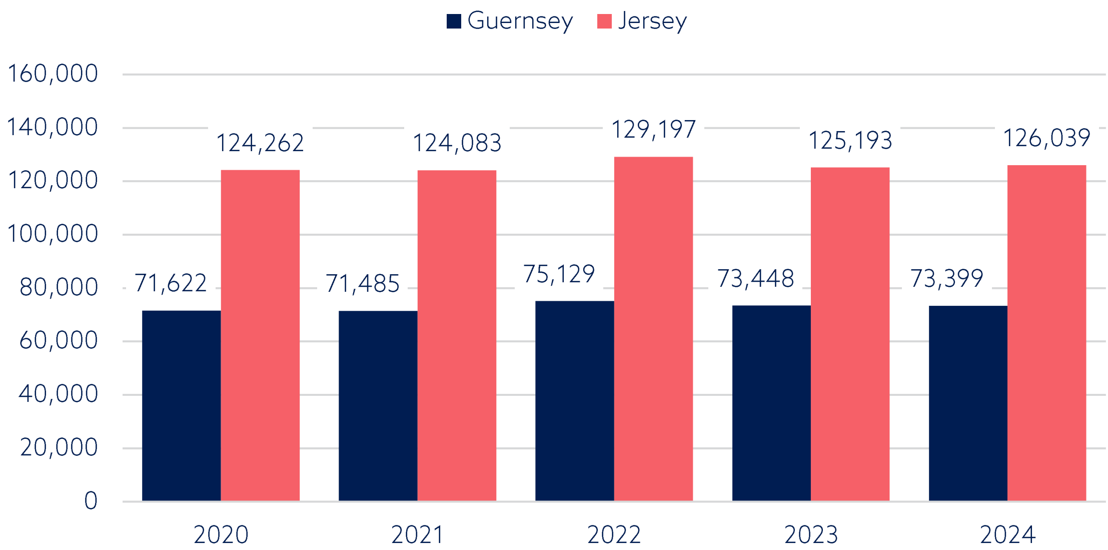
Subscriptions, penetration rates and market shares

In 2024, 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 29 shows the total number of mobile subscriptions in the Islands during the period 2020 to 2024. The figures include pre-paid (i.e. pay as you go) and post-paid (i.e. contract) subscriptions.

Figure 29: The number of active mobile subscriptions has remained at similar levels since 2020

Number of active mobile subscriptions in the Channel Islands, 2020 to 2024



Overall, the total number of mobile subscriptions in the Channel Islands increased from 198,641 in 2023 to 199,438 in 2024. In Guernsey, subscriptions fell slightly from 73,448 to 73,399, while in Jersey they increased from 125,193 to 126,039[11].

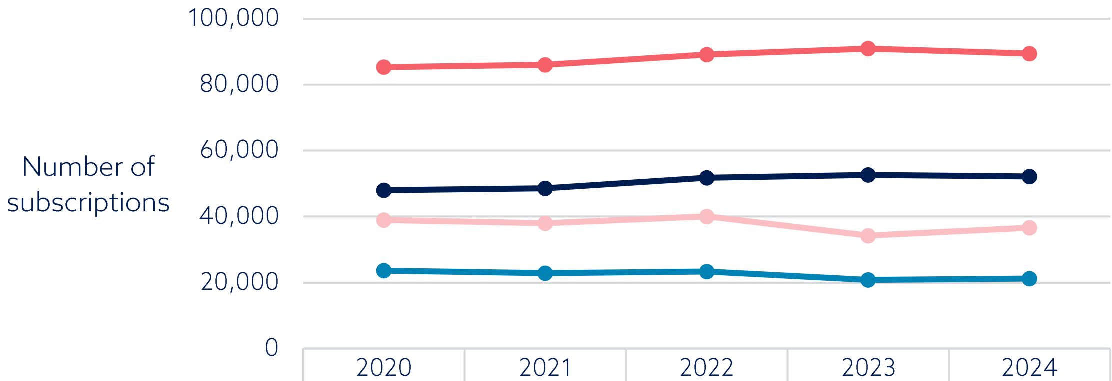
Figure 30 on the next page provides a breakdown of pre-paid and post-paid mobile subscriptions in each Island over the period 2020 to 2024.

[11] 2023 figures have been updated since the 2023 report was published following updated information from providers

Statistics Jersey

Figure 30: Both islands experienced an increase in pre-paid active mobile subscriptions since 2023

Pre- and post-paid mobile subscriptions, 2020 to 2024



	2020	2021	2022	2023	2024
Guernsey post-paid	48,009	48,590	51,760	52,628	52,142
Guernsey pre-paid	23,613	22,895	23,369	20,820	21,257
Jersey post-paid	85,314	86,076	89,118	90,936	89,391
Jersey pre-paid	38,948	38,007	40,079	34,257	36,648

After a steady growth in post-paid mobile subscriptions in both islands up to 2023, there was a slight decrease in both islands in 2024, with Guernsey experiencing a 0.9% decrease and Jersey a 1.7% decrease.

Pre-paid subscriptions increased in both islands in 2024, increasing by 2.1% in Guernsey and 7.0% in Jersey compared to 2023.[12]

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 2024 in Guernsey there were 113 active subscriptions per 100 inhabitants, and in Jersey there were 122 subscriptions per 100 inhabitants. These penetration rates in 2024 represent a slight decrease since 2023 in Guernsey and a small increase on 2023 in Jersey.

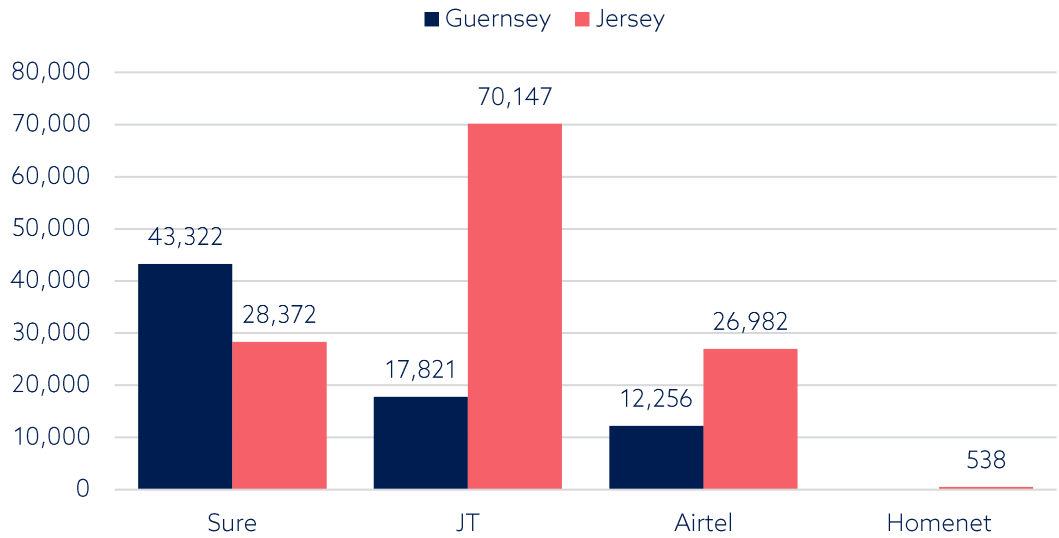
Figure 31 on the next page provides a breakdown of the total number of mobile subscriptions for the four mobile operators in the Islands.[13]

[12] 2023 figures have been updated since the 2023 report was published following updated information from providers

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

Figure 31: JT held the largest share of mobile subscriptions in Jersey, while Sure led in Guernsey

Number of mobile subscriptions by operator, 2024



Compared to 2023, Sure experienced a slight increase in the number of subscriptions in Guernsey, rising by 0.4%, but saw a 0.7% decrease in Jersey. JT recorded growth in both islands, with a 10.1% increase in Guernsey and a 5.6% rise in Jersey. In contrast, Airtel saw a significant decrease in subscriptions across both islands, down 13.2% in Guernsey and 8.1% in Jersey. Homenet's subscriptions continued to decrease significantly, falling by 36% compared to 2023.[14]

[14] 2023 figures have been updated since the 2023 report was published following updated information from providers

Figure 32 shows 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 32 – Sure held the largest mobile market share in Guernsey whilst JT led in Jersey

Mobile market share by number of subscriptions, Guernsey and Jersey, 2024

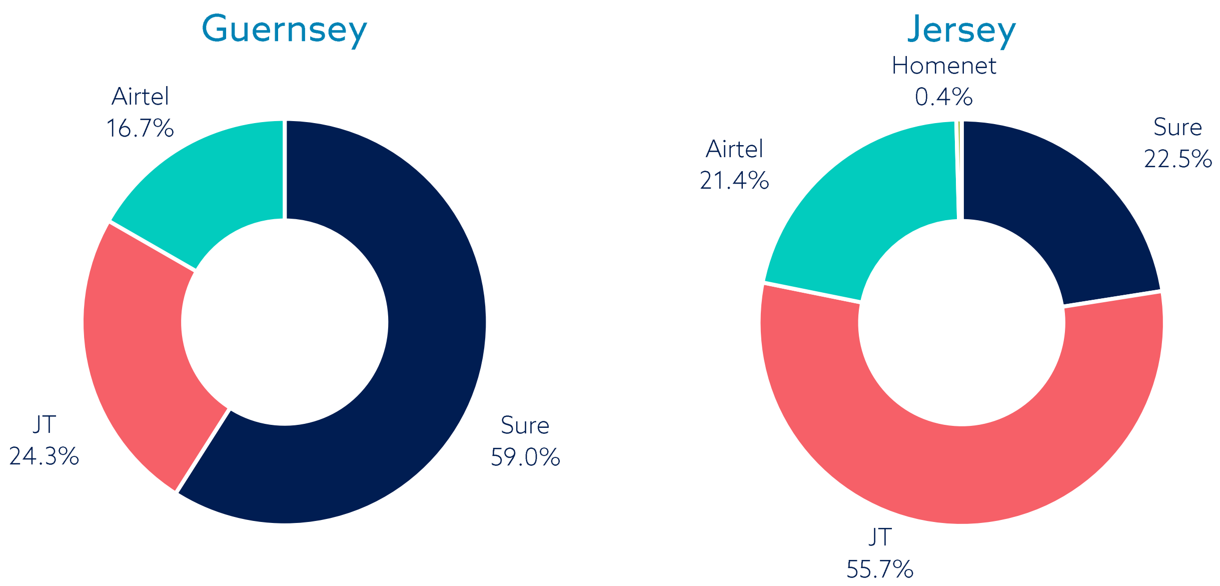


Table 6 shows the market shares of each operator in Guernsey and Jersey respectively between 2020 and 2024.

Table 6 – Mobile market share (%) of subscriptions in Guernsey and Jersey, 2020 to 2024

	Guernsey			Jersey			
	Sure	JT	Airtel	Sure	JT	Airtel	Homenet
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[15]	59	22	19	23	53	23	1
2024	59	24	17	23	56	21	0

In Guernsey, JT increased their market share by 2 percentage points from Airtel. In Jersey, the incumbent JT captured an additional 3 percentage points of market share, due to declines in Airtel's and Homenet's shares.

[15] 2023 figures have been updated since the 2023 report was published following updated information from providers

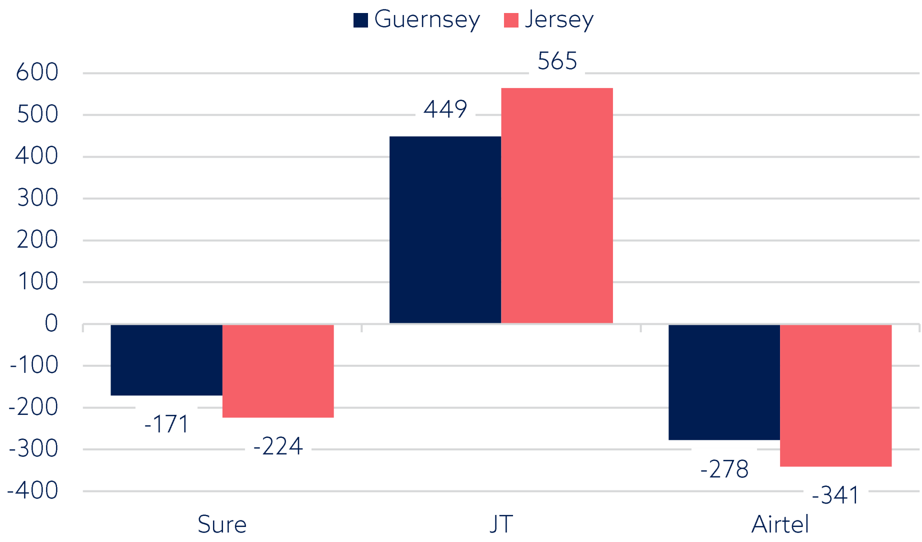
Switching activity in the Guernsey and Jersey mobile markets

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

Figure 33: JT experienced a net gain in subscribers across both islands in 2024, while Sure and Airtel had a net loss

Net number of consumers switching mobile service provider, 2024



Source: Porting XS MNP Channel Islands data 2024

In Jersey in 2024, 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, 2024

	Guernsey			Jersey		
	Sure	JT	Airtel	Sure	JT	Airtel
Port in	520	757	226	671	1,182	385
Port out	691	308	504	895	617	726
Net	-171	449	-278	-224	565	-341

Source: Porting XS MNP Channel Islands data 2024

Table 8 shows the percentage of registered mobile numbers that switched service provider in Guernsey and Jersey from 2020 to 2024. In Guernsey 2.0% of registered mobile numbers ported between service providers in 2024, whilst in Jersey the figure was 1.8%.

Table 8 – Levels of mobile number switching in Guernsey and Jersey, 2020 to 2024

% of mobile subscribers switching provider	2020	2021	2022	2023[16]	2024
Guernsey	2.3	2.8	1.8	2.1	2.0
Jersey	2.0	1.9	1.7	1.8	1.8

Source: Porting XS MNP Channel Islands data 2020 to 2024 and Industry questionnaires

1,503 mobile subscribers in Guernsey ported between service providers in 2024. In Jersey, the equivalent figure was 2,238.

In 2024, the average time required to complete a successful port between providers was 0.9 working days in Guernsey and 1.0 working day in Jersey.[17] The European Commission's Universal Service Directive requires operators to provide porting within 1 working day.[18]

[16] 2023 figures have been updated since the 2023 report was published following updated information from providers

[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

Table 9 – Average porting time in Guernsey and Jersey, 2020 to 2024

Average porting time (working days)	2020	2021	2022	2023	2024
Guernsey	1.1	1.3	1.4	1.1	0.9
Jersey	1.1	1.1	1.4	1.2	1.0

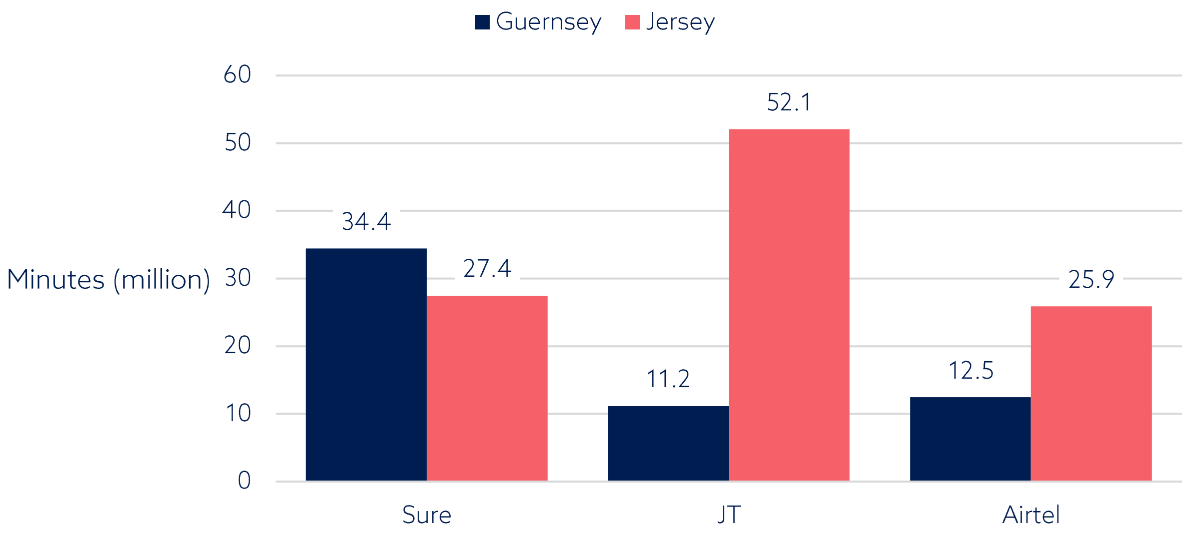
Average porting time in Guernsey decreased to 0.9 working days in 2024 from 1.1 working days in 2023. Average porting time in Jersey also decreased to 1.0 working days in 2024, down from 1.2 days in 2023.

Voice traffic - numbers of minutes

Figure 34 shows the number of mobile voice minutes originating on each operator's network in each Island in 2024. This included traffic derived from in-roaming activities. In-roaming is the use of mobile services by customers of non-Channel Island operators roaming on Channel Islands networks.

Figure 34: JT recorded the highest volume of voice traffic minutes in Jersey, while Sure accounted for the largest share of voice minutes in Guernsey

Total number of mobile minutes originating on Channel Island mobile networks, 2024



The total number of mobile minutes has decreased by 8.9% in Guernsey to 58.1 million in 2024 and has decreased by 15.8% in Jersey to 105.4 million.

Table 10 shows the average number of mobile voice minutes in 2024 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 roaming on networks outside of the Channel Islands.

Table 10 – Average mobile voice minutes per pre-paid and post-paid subscription, 2024

	Guernsey	Jersey
Minutes per pre-paid subscriber	340	399
Minutes per post-paid subscriber	851	901

Source: Industry questionnaires

Compared to 2023, in Guernsey the number of minutes per pre-paid and post-paid subscriber have decreased by 11.0% and 7.9% respectively. In Jersey, minutes per pre-paid subscriber have decreased by 19.4% and minutes per post-paid subscriber have decreased by 13.5%.[19]

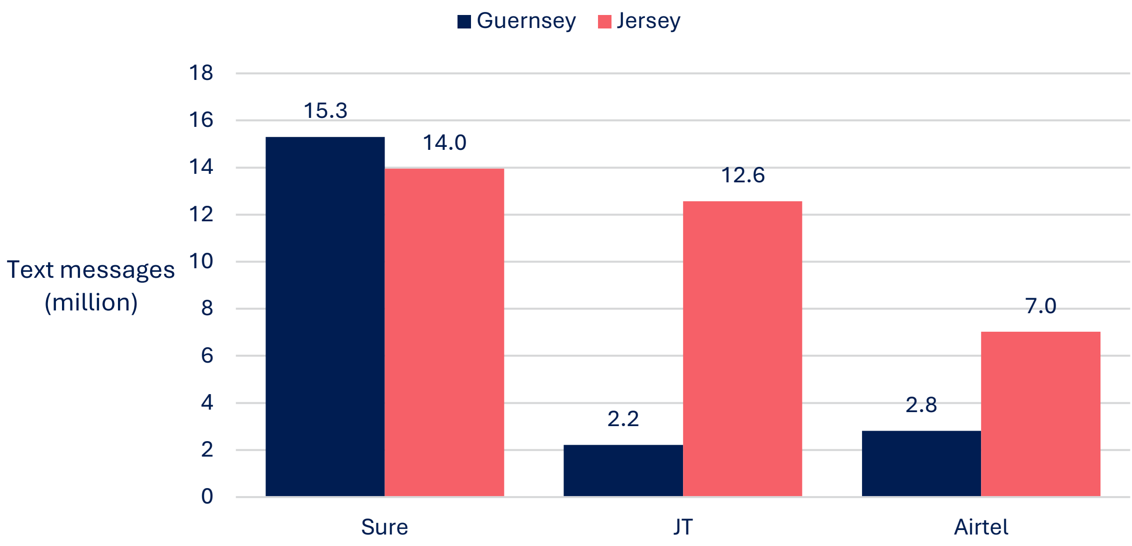
[19] 2023 figures have been updated since the 2023 report was published following updated information from providers

SMS traffic – numbers of messages

Figure 35 shows the number of SMS text messages originating on each operator's network in each Island in 2024. These include SMS messages associated with in-roaming activities.

Figure 35: Sure had the largest share of SMS text messages sent in both islands among the three providers

Total number of SMS text messages originating on Channel Island mobile networks, 2024



Overall, text volumes have continued to fall in both Islands. In Guernsey, the number of messages decreased by 7.9% to 20.3 million; in Jersey the number of messages decreased by 11.2% to 33.5 million.

Table 11 shows the average number of SMS text messages sent in 2024 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.

Statistics Jersey

Table 11 – Average SMS text messages per pre-paid and post-paid subscription, 2024

	Guernsey	Jersey
SMS messages per pre-paid subscriber	120	122
SMS messages per post-paid subscriber	167	220

Source: Industry questionnaires

In Guernsey, the number of SMS messages per pre-paid and post-paid subscriber both decreased by 14.4% compared to 2023. In Jersey, SMS message usage decreased by 20.1% for pre-paid subscribers and by 12.1% for post-paid subscribers.[20]

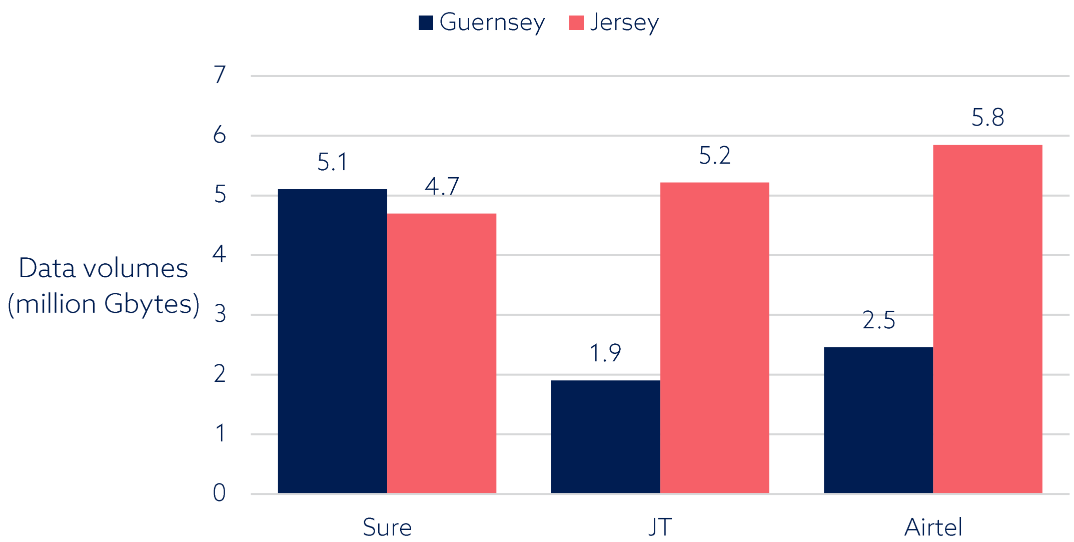
[20] 2023 figures have been updated since the 2023 report was published following updated information from providers

Mobile data

Figure 36 shows the volume of data (in Gbytes) sent and received over each operator's network in each Island in 2024. These include data associated with pre-paid and post-paid mobile sims and in-roaming activities.

Figure 36: Airtel's network accounted for the largest share of mobile data volumes in Jersey, while Sure had the largest share in Guernsey

Mobile data volumes (million Gbytes) sent and received on Channel Island networks, 2024



Overall, data volumes have continued to increase in both Islands. In Guernsey, the volume of data increased by 5.5% to 9.5 million Gbytes, and in Jersey the volume of data increased by 5.7% to 15.8 million Gbytes.

Table 12 shows the average data volume (in Gbytes) used in 2024 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, 2024

	Guernsey	Jersey
Gbytes of data per pre-paid subscriber	134.0	129.1
Gbytes of data per post-paid subscriber	116.0	111.3

Compared to 2023, in Guernsey the volume of data per pre-paid subscriber increased by 17.8% and the volume of data per post-paid subscriber increased by 1.1%. In Jersey, the volume of data per pre-paid subscriber increased by 22.1% and the volume of data per post-paid subscriber decreased by 0.9%.

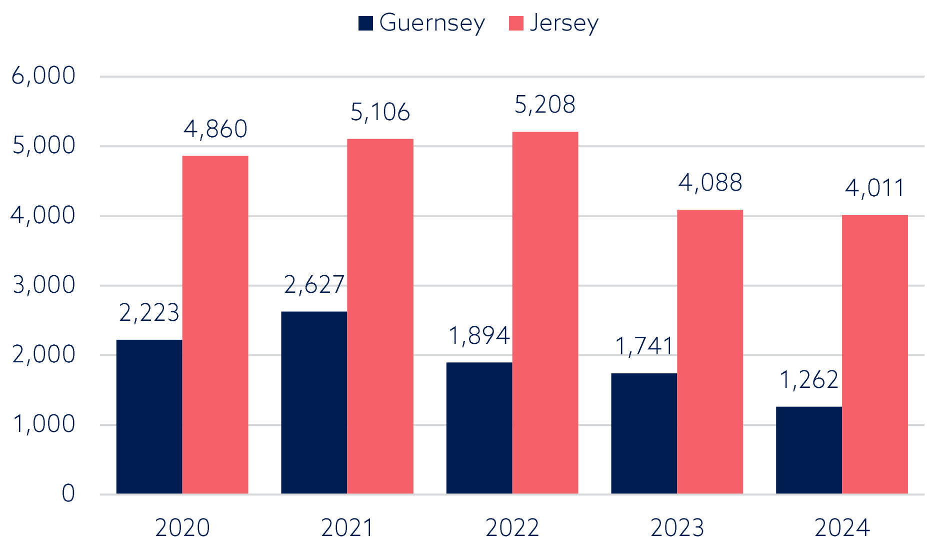
As with most countries, the use of mobile for data purposes in the Channel Islands has been increasing while the number of SMS text messages has been falling.

Data only mobile SIMs

To monitor the changing nature of the mobile market (from SMS and voice to data), information on data-only SIM cards types is also collected.

Figure 37: The number of data only subscriptions has been decreasing in both islands since 2022

Number of data only subscriptions, 2020 to 2024



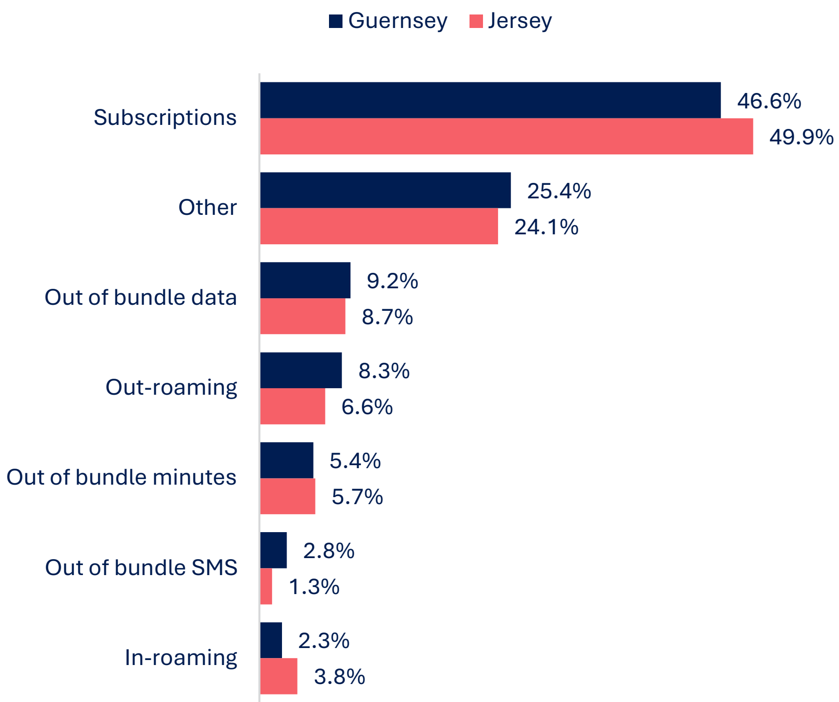
In 2024, there were 1,262 mobile subscriptions for data only in Guernsey, representing a decrease of 27.5%. In Jersey, there were 4,011 mobile subscriptions for data only, representing a decrease of 1.9% from 2023 and a decrease of 23% from 2022.

Mobile revenue

Total revenue from mobile related activities in Guernsey in 2024 was £20.7m and in Jersey £36.7m. Revenue has increased in both Islands compared to 2023 (Guernsey increased by 1.5%, Jersey by 1.7%). Figure 38 provides a breakdown of the sources of mobile revenues for each island.

Figure 38 – Subscriptions was the largest source of mobile revenues in both Guernsey and Jersey in 2024

Sources of mobile revenue in Guernsey and Jersey, 2024



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, 2024

		Guernsey	Jersey
Pre-paid	During 2024	£132.24	£125.07
	Ave per month	£11.02	£10.42
Post-paid	During 2024	£266.75	£279.61
	Ave per month	£22.23	£23.30

In Guernsey, the spend per pre-paid subscriber has decreased by 2.7% compared to 2023, and the spend per post-paid subscriber has increased by 8.3%. In Jersey, the spend per pre-paid subscriber decreased by 10.5% compared to 2023, and the spend per post-paid subscriber increased by 2.7%.[21]

[21] 2023 mobile subscriptions have been revised for both Jersey and Guernsey since the 2023 report based on updated information from providers

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, 2024

	Guernsey	Jersey
Minutes	1,310,957	5,397,969
SMS texts	344,140	1,010,488
Data (Gbytes)	85,932	327,902

In 2024, Guernsey saw a 20.2% decrease in out-roaming call minutes compared to 2023, while Jersey experienced a significant increase of 28.9%. Out-roaming SMS traffic in Guernsey also declined significantly, dropping by 21.0%, whereas Jersey recorded a 16.9% increase. Out-roaming data usage increased in both islands, with Guernsey up by 73.4% and Jersey by 57.5%.

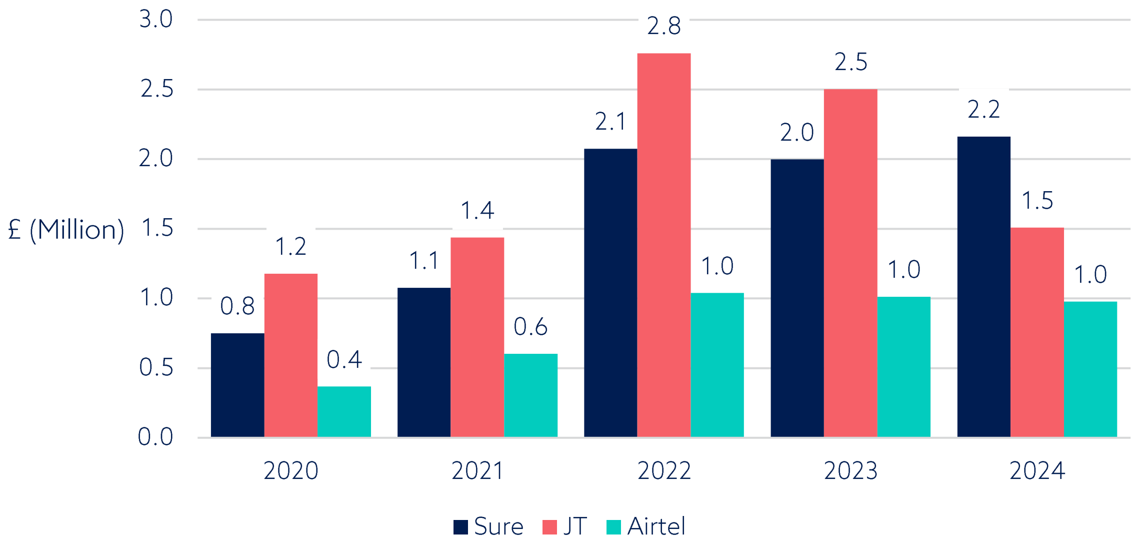
Out-roaming revenues

In 2024, operators in the Channel Islands generated total revenues of £4.6m from out-roaming activities (compared to £5.5m in 2023): 8.4% of total mobile revenue (excluding in-roaming revenues).

Figure 39 shows total out-roaming revenues in the period 2020 to 2024, combining Guernsey and Jersey. Out-roaming revenues for the Channel Islands have decreased 15.6% since 2023.

Figure 39: Total out-roaming revenues have been decreasing in the Channel Islands since 2022

Total out-roaming revenues in the Channel Islands, 2020 to 2024



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 non-Channel Island operators roaming on networks within the Channel Islands. Similarly, in-roaming SMS texts are those sent and received, and in-roaming data is data both sent and received, by customers of non-Channel Island networks roaming on Channel Island networks.

Table 15 – In-roaming minutes, SMS texts and data volumes in the Channel Islands, 2024

	Guernsey	Jersey
Minutes	7,752,801	15,572,591
SMS texts	9,395,919	10,395,187
Data (Gbytes)	654,208	1,406,453

In-roaming call minutes showed a decrease in both islands in 2024 compared to 2023, decreasing by 11.7% in Guernsey and 11.6% in Jersey. In-roaming SMS texts showed a small increase in 2024 in Guernsey, up by 1.1%, while Jersey had a decrease of 2.2%. In-roaming data usage showed increases in both Jersey (9.8%) and Guernsey (6.6%).

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

Statistics Jersey

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	64,781 estimated on 31st December 2023
Jersey	103,650 estimated on 31st December 2023

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.

Statistics Jersey

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 June 2025

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.

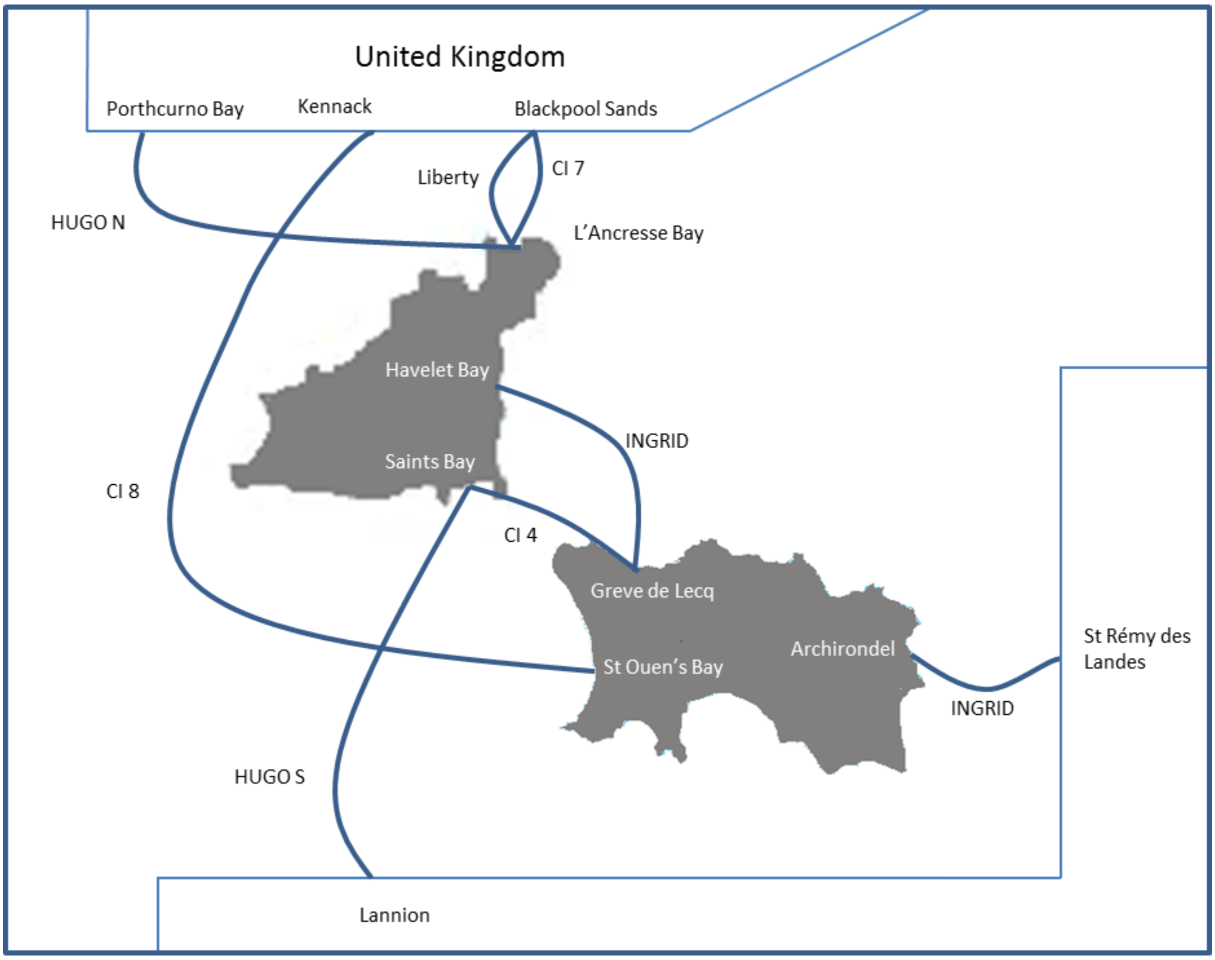
Cable dispositions

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.

Statistics 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) technology allows the transmission of multiple wavelengths over the same fibre strand, thus making the potential cable capacity extremely large. Depending on the DWDM equipment fitted to the cable each wavelength can support very high bandwidths with current technology supporting up to 800Gbit/s whilst 100Gbit/s is commonly deployed. 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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	69.0	64.1	61.4	61.6	63.1	69.6	71.2	75.3	71.4
Jersey	97.8	101.9	101.2	105.9	104.1	107.8	107.2	112.6	120.0
Channel Islands	166.8	166.0	162.6	167.5	167.2	177.4	178.4	188.0	191.4

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	227	227	222	212	211	209	224	234	223
Jersey	505	506	554	592	583	545	537	506	497
Channel Islands	732	733	776	804	794	754	761	740	720

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	10.0	4.9	5.2	16.1	3.6	8.2	6.2	16.3	17.4
Jersey	22.6	23.3	19.6	18.7	17.5	13.1	9.4	25.4	20.1
Channel Islands	32.6	28.2	24.8	34.7	21.1	21.3	15.6	41.7	37.5

Statistics Jersey

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	36.6	36.0	35.7	34.0	33.9	33.9	33.4	32.6	31.8
Jersey	58.3	55.9	47.9	47.4	48.0	48.1	48.1	48.2	47.6
Channel Islands	95.0	91.9	83.6	81.5	81.9	82.1	81.5	80.9	79.4

Table A5 – Number of fixed line minutes, millions

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	72.1	70.2	68.2	62.3	67.0	54.9	44.7	36.9	28.4
Jersey	120.1	110.8	99.0	87.4	96.9	72.8	59.7	49.9	42.6
Channel Islands	192.2	181.0	167.2	149.8	163.9	128.7	104.4	86.8	71.0

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	23.2	24.0	24.4	24.9	25.3	25.9	26.3	26.9	27.0
Jersey	35.9	37.2	37.9	38.4	39.7	40.7	42.2	43.0	43.9
Channel Islands	59.1	61.2	62.3	63.3	65.0	66.6	68.5	69.9	70.8

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	24.6	25.5	26.8	26.7	27.6	28.5	28.2	28.7	28.2
Jersey	39.2	41.2	43.6	42.9	43.5	45.8	47.4	47.1	47.9
Channel Islands	63.8	66.7	70.3	69.6	71.1	74.3	75.6	75.7	76.1

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	575	642	622	705	760	635	653	593	576
Jersey	1061	1017	937	1005	745	694	729	683	509
Channel Islands	1636	1659	1559	1710	1505	1329	1382	1276	1085

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

	2019	2020	2021	2022	2023	2024
Guernsey	314	287	260	232	199	196
Jersey	249	207	202	207	191	211
Channel Islands	563	494	462	439	390	407

Table A10 – Number of active mobile subscriptions in the Channel Islands, thousands[22]

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	71.2	68.8	71.3	72.0	71.6	71.5	75.1	73.4	73.4
Jersey	121.8	120.9	125.9	127.1	124.3	124.1	129.2	125.2	126.0
Channel Islands	192.9	189.7	197.2	199.1	195.9	195.6	204.3	198.6	199.4

[22] 2023 data has been updated since the 2023 report was published due to updated information received from providers

Statistics Jersey

Table A11 – Number of pre-paid mobile subscriptions in the Channel Islands, thousands[23]

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	29.5	26.4	26.3	26.1	23.6	22.9	23.4	20.8	21.3
Jersey	49.6	46.5	47.1	45.6	38.9	38.0	40.1	34.3	36.6
Channel Islands	79.2	72.9	73.4	71.7	62.6	60.9	63.4	55.1	57.9

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	41.7	42.4	45.0	45.9	48.0	48.6	51.8	52.6	52.1
Jersey	72.1	74.4	78.8	81.5	85.3	86.1	89.1	90.9	89.4
Channel Islands	113.8	116.8	123.8	127.4	133.3	134.7	140.9	143.5	141.5

Table A13 – Levels of mobile number switching, % of mobile subscribers[24]

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Guernsey	1.6	2.8	2.8	2.5	2.3	2.8	1.8	2.1	2.0
Jersey	2.4	3.7	3.1	2.5	2.0	2.0	1.9	1.8	1.8

[23] 2023 data has been updated since the 2023 report was published due to updated information received from providers

[24] 2023 data has been updated since the 2023 report was published due to updated information received from providers