



QUARTERLY MARKET UPDATE

January to March 2018

Quarterly Market Update – Q1 2018

The Telecommunications Authority of Trinidad and Tobago
8th Avenue Extension
Barataria
Republic of Trinidad and Tobago

Tel: 1-868-675-8288

Fax: 1-868-674-1055

Website: <http://www.tatt.org.tt>

Email: policy@tatt.org.tt

© August 2018

Legal Disclaimer

The information and statistics contained in this document were obtained from various sources available to the Telecommunications Authority of Trinidad and Tobago at the time of publication. The Authority does not give any warranty as to the accuracy or reliability of the information and shall not be liable for any loss or damage howsoever caused arising out of any use or reliance upon any statements made or information contained in this document.

Contents

Telecommunications Sector

01

Fixed Voice Market

02

Mobile Market

03

Internet Market

Broadcasting Sector

04

Pay TV Market

05

Free-to-Air Radio Market

06

Free-to-Air TV Market

Notes

1. **Fixed Internet Market includes fixed wired and fixed wireless Internet.**

2. **Penetration rates have been calculated using the following total population figures:**
 - a) **1,349,667 (2015 Mid-year population estimate; CSO)**

 - b) **1,353,895 (2016 Mid-year population estimate; CSO)**

 - c) **Number of households used - 401,382 (Trinidad and Tobago 2011 population and housing census demographic report; CSO)**

3. **The Authority is currently verifying data submitted by Digicel (Trinidad and Tobago) Limited for the periods 2016 and Q1 2017. Therefore, data represented in this Report may be revised pending resubmission of data by Digicel.**

Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

306,900



Y-o-Y PERCENT CHANGE

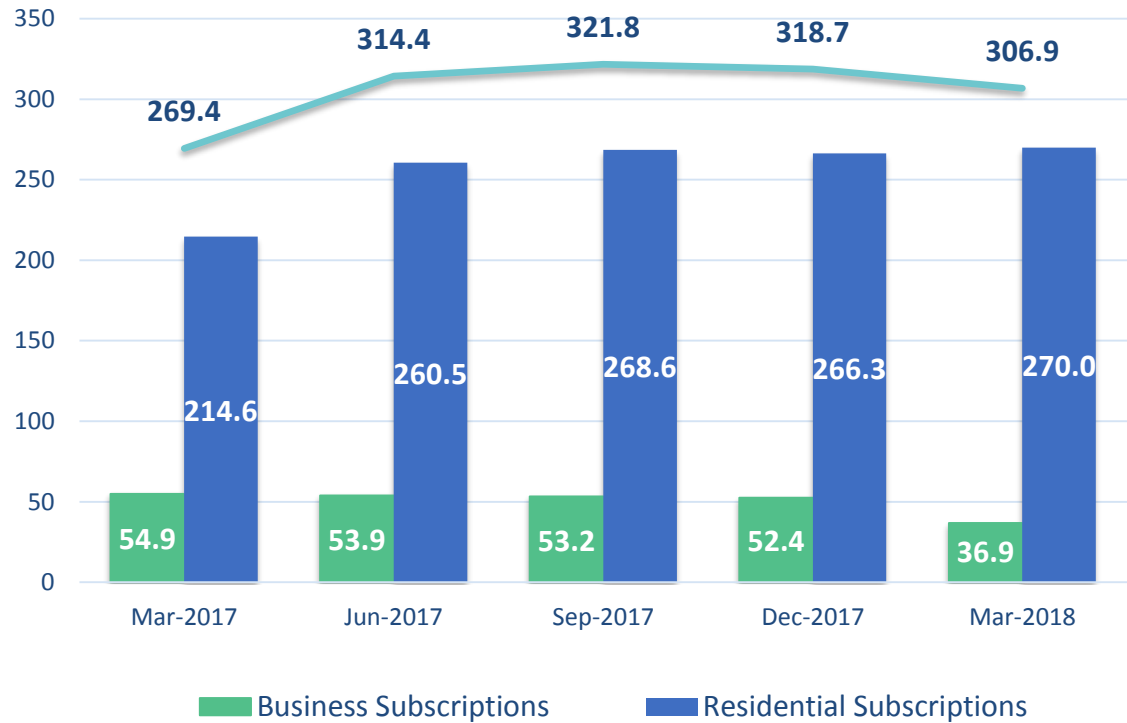
13.9%



Q-o-Q PERCENT CHANGE

-3.7%

NUMBER OF FIXED VOICE SUBSCRIPTIONS
Q1 2017 TO Q1 2018



Fixed Voice Penetration

FIXED VOICE
PENETRATION PER
100 INHABITANTS

23.5

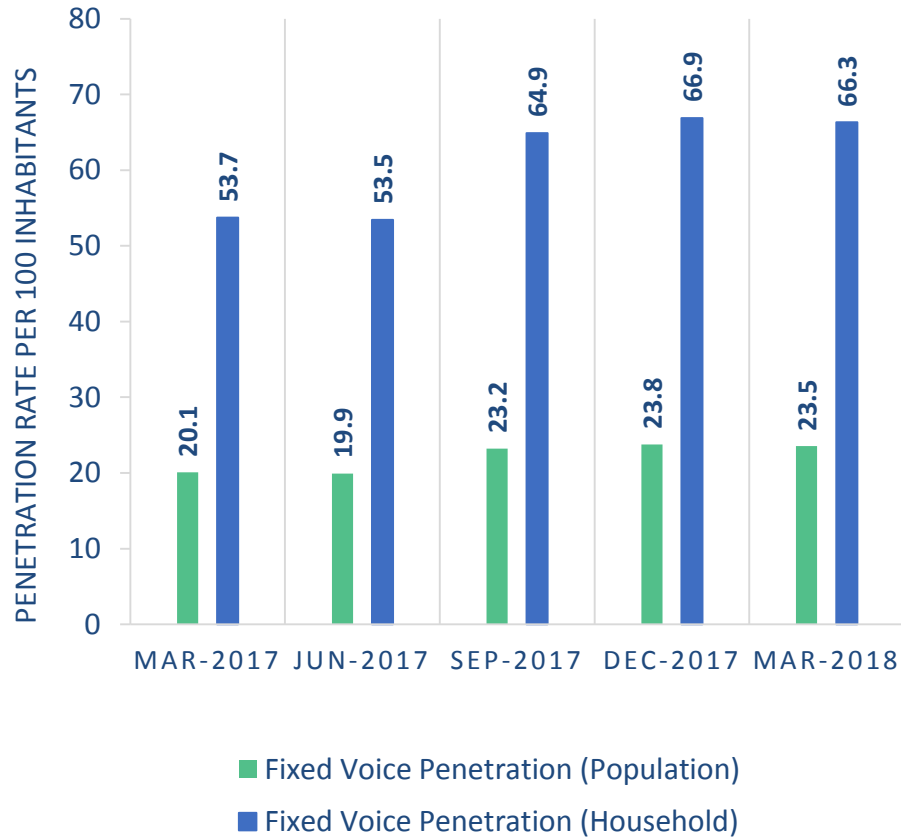
Y-o-Y
PERCENT CHANGE

16.9%

Q-o-Q
PERCENT CHANGE

-1.3%

FIXED VOICE PENETRATION RATES
Q4 2017 TO Q4 2018



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

66.3

Y-o-Y
PERCENT CHANGE

23.5%

Q-o-Q
PERCENT CHANGE

-0.9%

Fixed Voice Revenues

\$

GROSS REVENUES

\$160.4m

Y-o-Y

PERCENT CHANGE

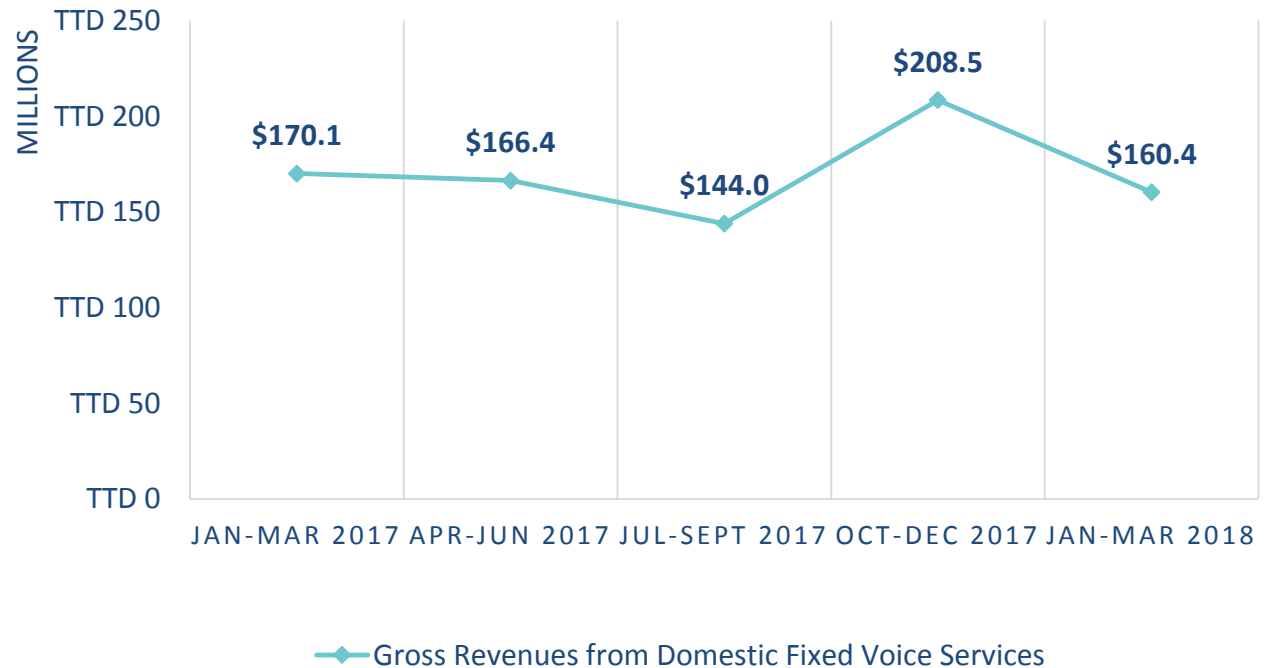
-5.7%

Q-o-Q

PERCENT CHANGE

-23.1%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES
FROM Q1 2017 TO Q1 2018



Fixed Voice HHI



HHI

4,357



Y-o-Y
PERCENT CHANGE

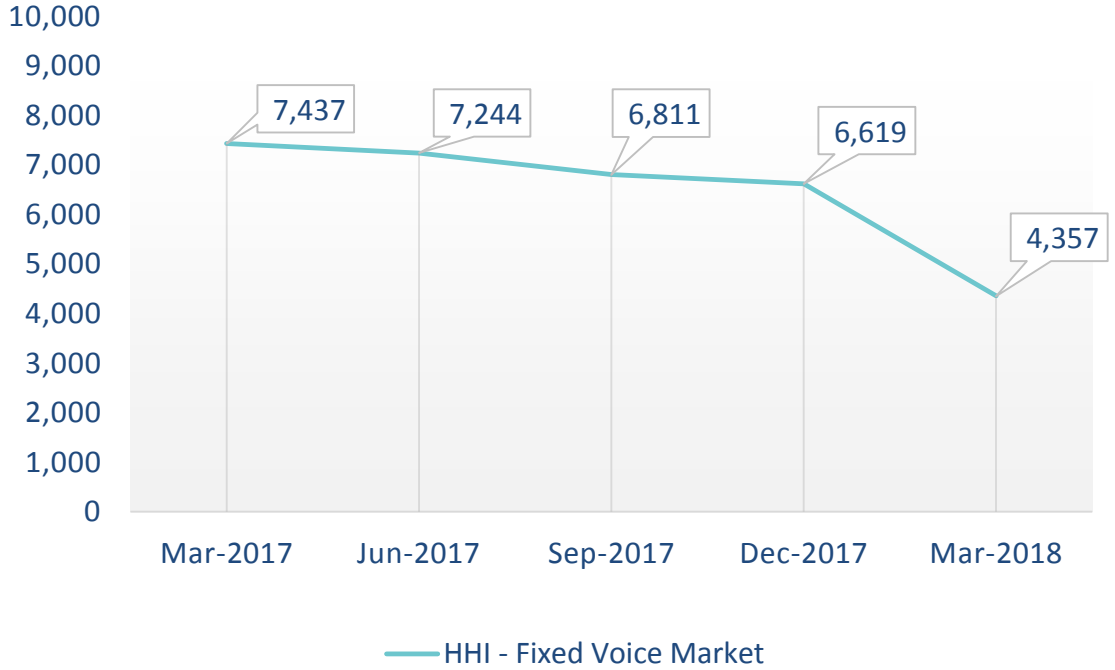
-41.4%



Q-o-Q
PERCENT CHANGE

-34.2%

HHI FOR DOMESTIC FIXED LINE
FROM Q1 2017 TO Q1 2018



Fixed Voice Average Revenue Per User

ARPU



\$525

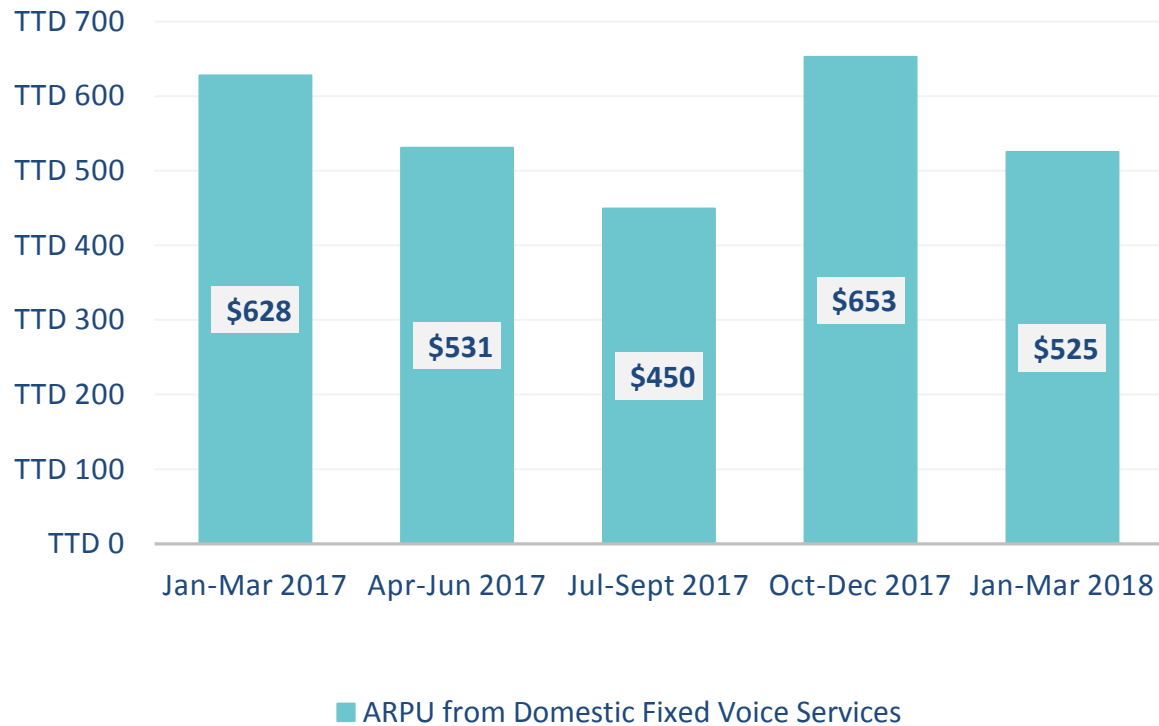
Y-o-Y
PERCENT CHANGE

-16.4%

Q-o-Q
PERCENT CHANGE

-19.6%

ARPU FROM DOMESTIC FIXED VOICE SERVICES
FROM Q1 2017 TO Q1 2018



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,045,000



Y-o-Y PERCENT CHANGE

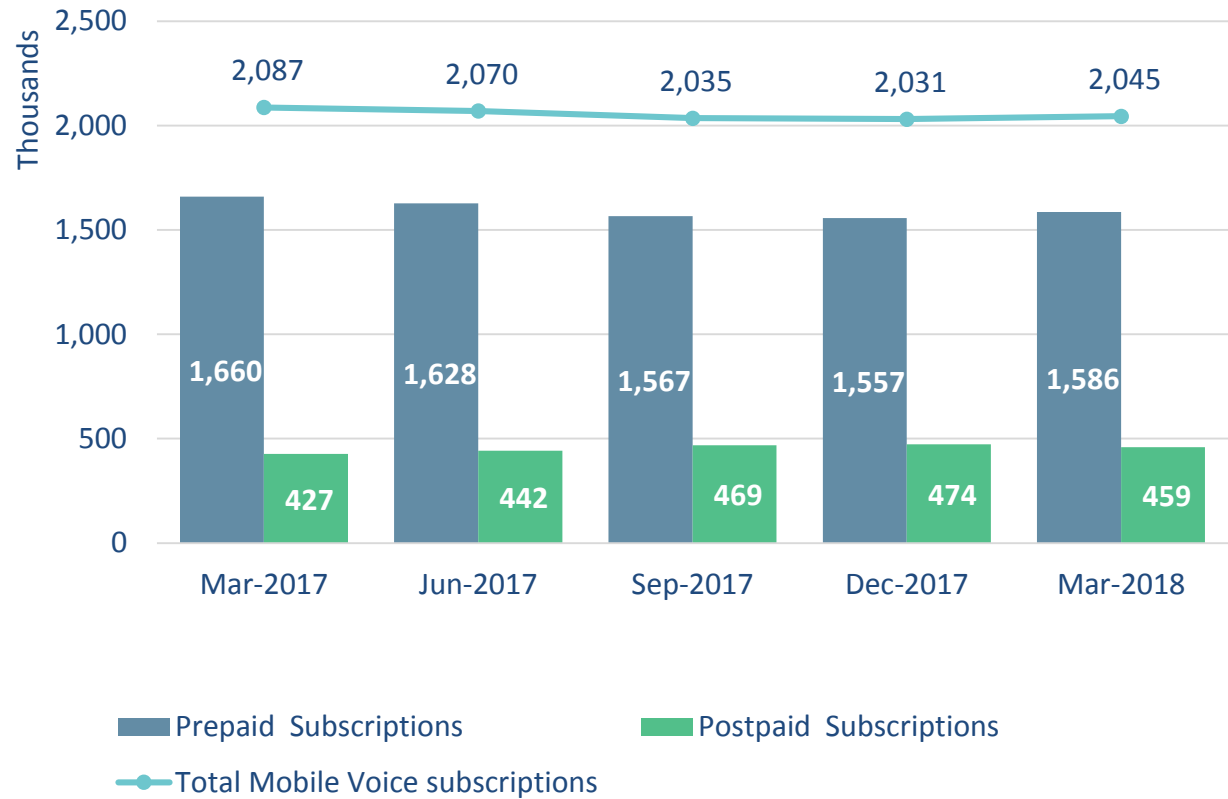
-2.0%



Q-o-Q PERCENT CHANGE

0.7%

NUMBER OF MOBILE VOICE SUBSCRIPTIONS FROM Q1 2017 TO Q1 2018



Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

151



Y-o-Y
PERCENT CHANGE

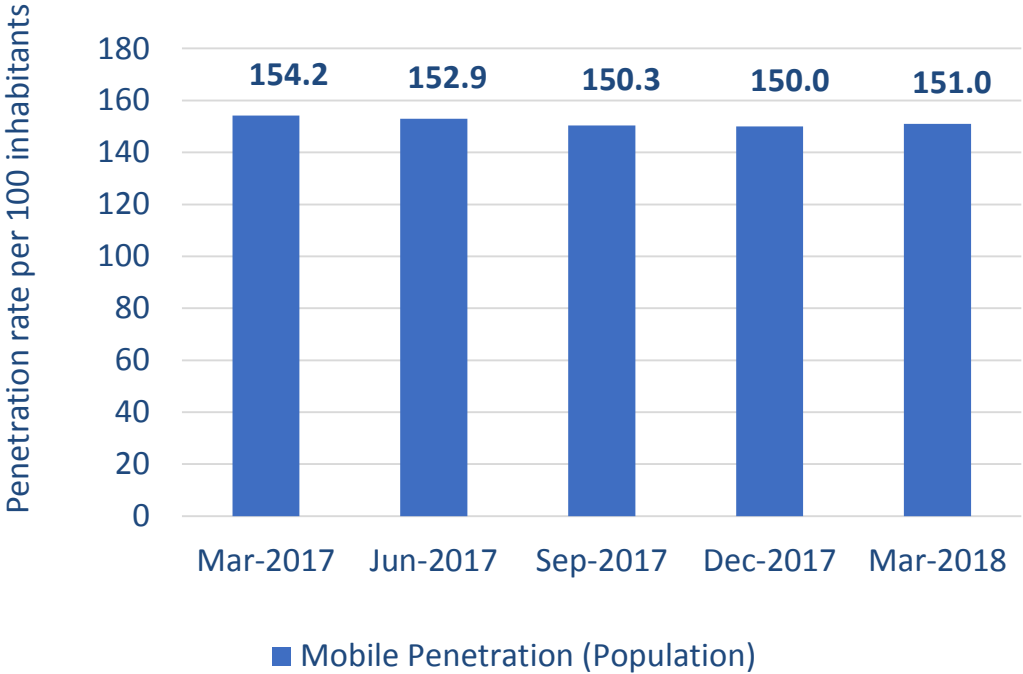
-2.1%



Y-o-Y
PERCENT CHANGE

0.7%

PENETRATION OF MOBILE VOICE SUBSCRIPTIONS
FROM Q1 2017 TO Q1 2018



Mobile Services Revenues

\$

GROSS REVENUES

\$506m



Y-o-Y
PERCENT CHANGE

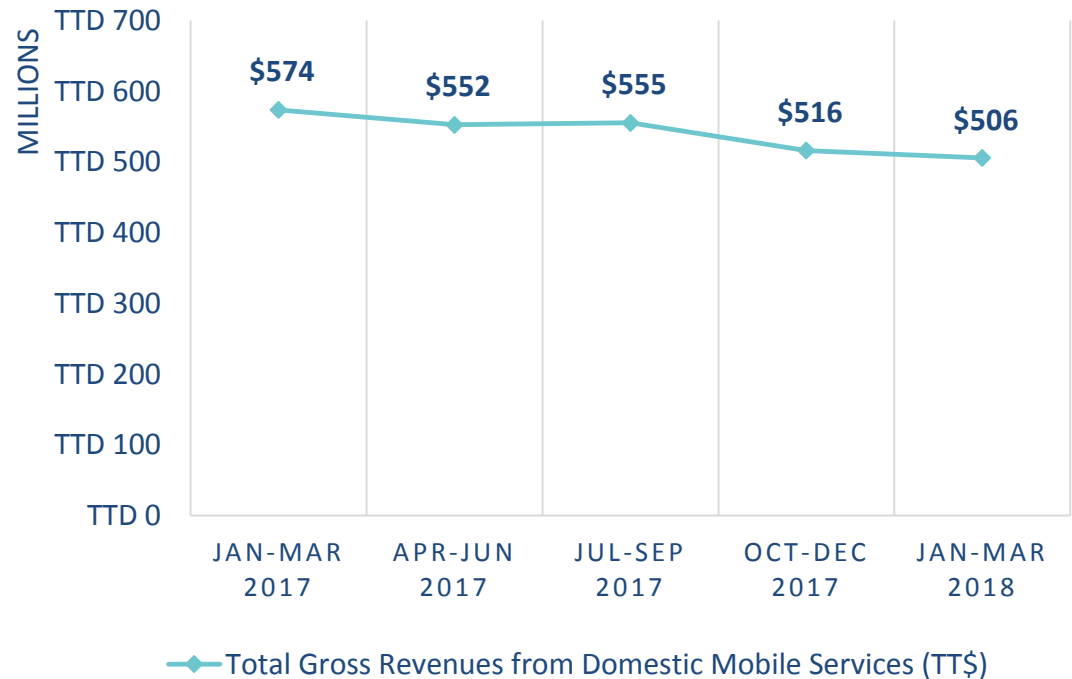
-11.8%



Q-o-Q
PERCENT CHANGE

-1.9%

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$) FROM Q1 2017 TO Q1 2018



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,059



Y-o-Y
PERCENT CHANGE

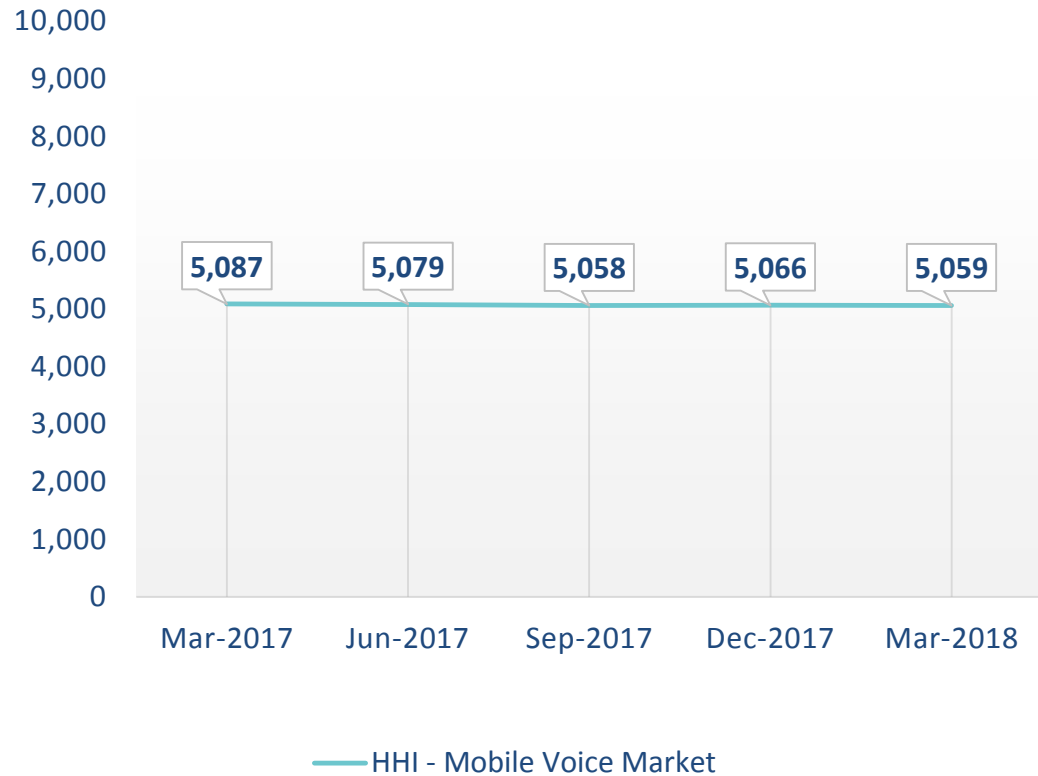
-0.6%



Q-o-Q
PERCENT CHANGE

-0.1%

HHI FOR DOMESTIC MOBILE SERVICES
FROM Q1 2017 TO Q1 2018



Mobile Services

Average Revenue Per User



ARPU

\$250



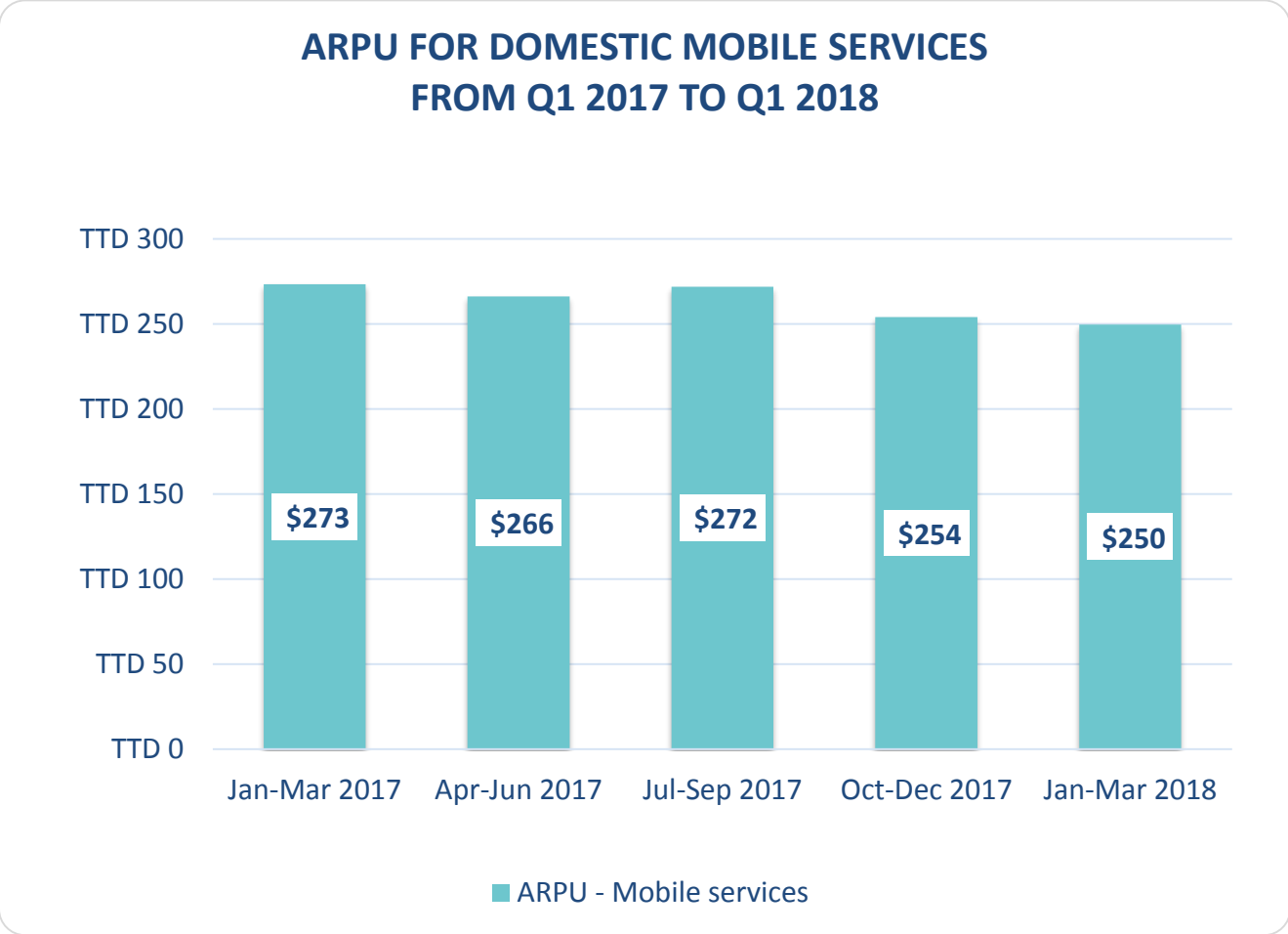
Y-o-Y
PERCENT CHANGE

-8.4%



Q-o-Q
PERCENT CHANGE

-1.6%



Fixed Broadband Subscriptions

TOTAL NUMBER OF
SUBSCRIPTIONS

332,200

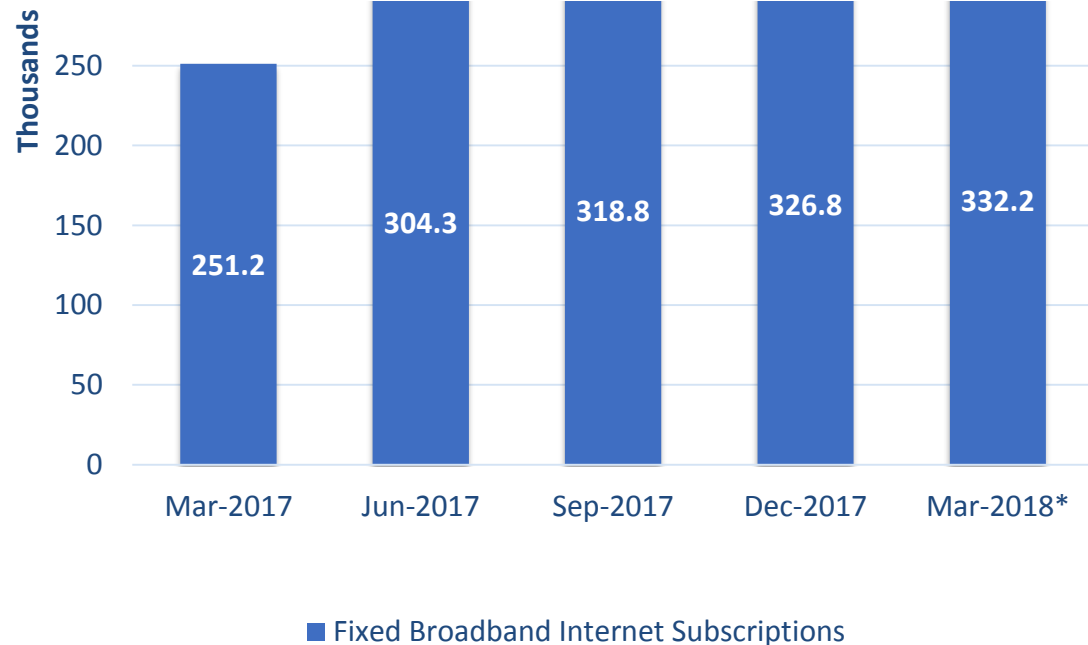
Y-o-Y
PERCENT CHANGE

32.2%

Q-o-Q
PERCENT CHANGE

1.7%

NUMBER OF FIXED BROADBAND INTERNET SUBSCRIPTIONS
FROM Q1 2017 TO Q1 2018



** Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom*

Fixed Internet Penetration



FIXED INTERNET
PENETRATION PER
100 INHABITANTS

24.6



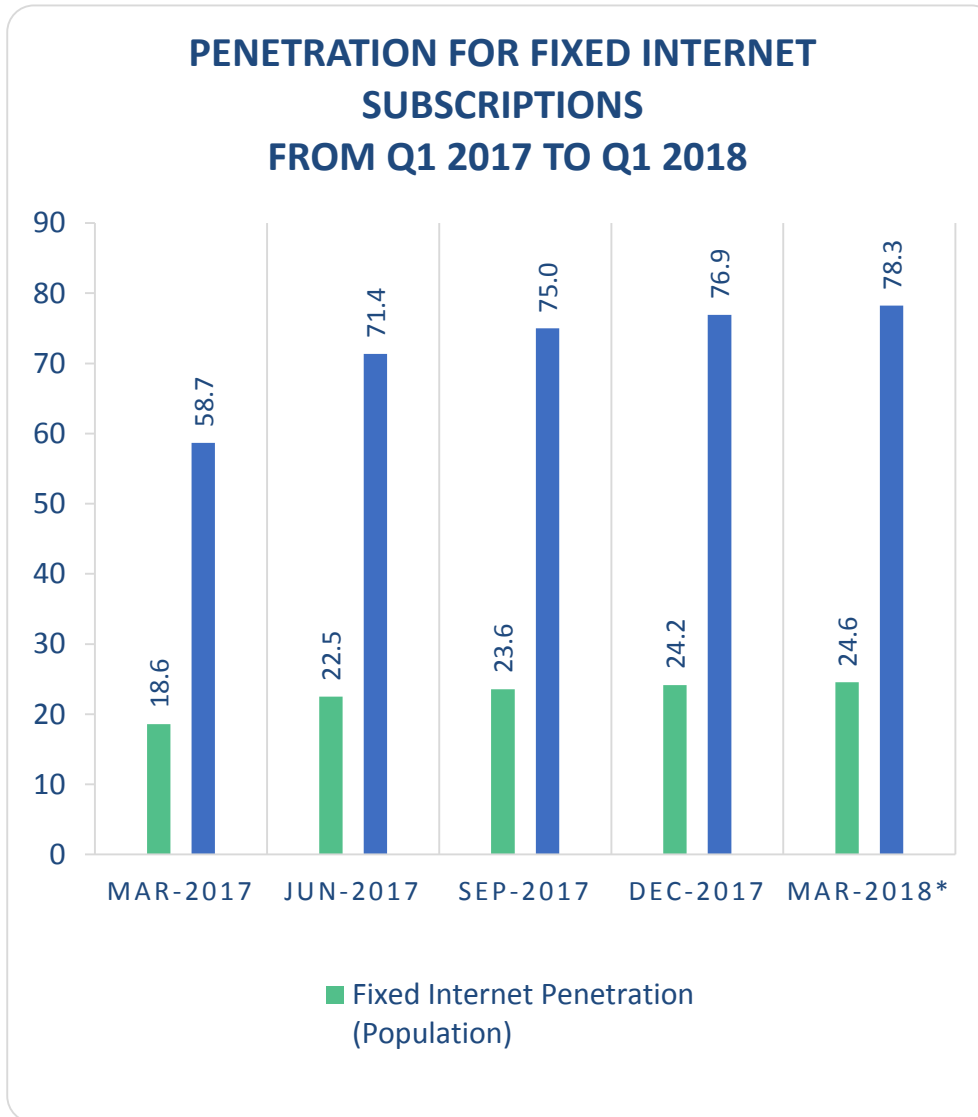
Y-o-Y
PERCENT CHANGE

32.3%



Y-o-Y
PERCENT CHANGE

1.7%



FIXED INTERNET
PENETRATION PER
100 HOUSEHOLDS

78.3



Y-O-Y
PERCENT CHANGE

33.4%



Y-O-Y
PERCENT CHANGE

1.8%

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

49.9%

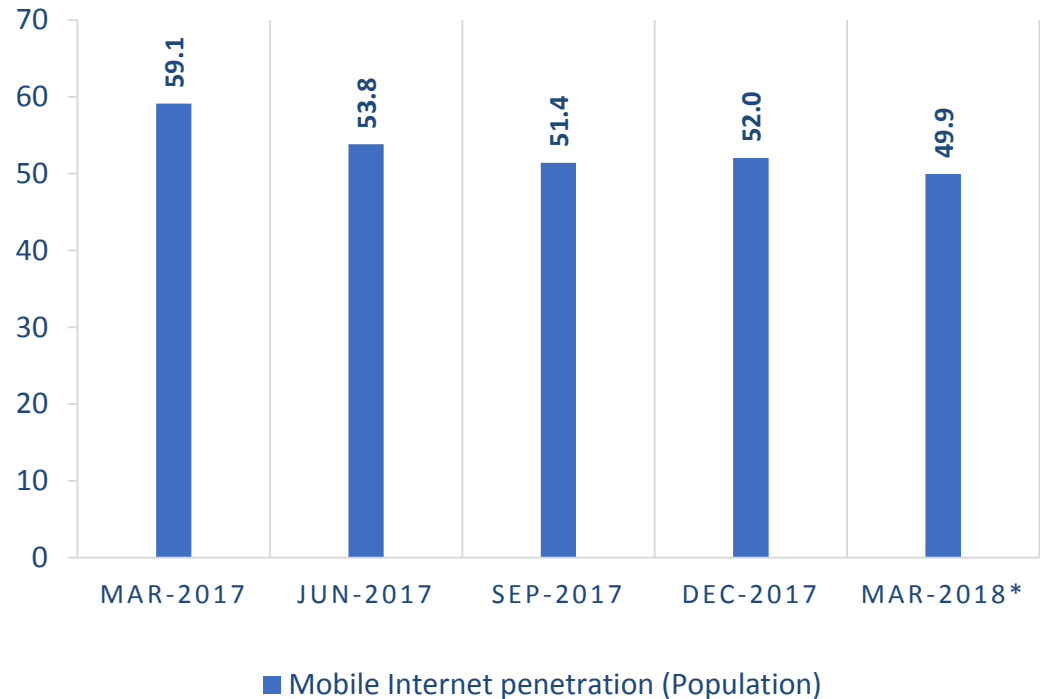
Y-o-Y
PERCENT CHANGE

-15.6%

Y-o-Y
PERCENT CHANGE

4.0%

PENETRATION FOR MOBILE INTERNET SUBSCRIPTIONS
FROM Q1 2017 TO Q1 2018



Calculated using the total number of Active Mobile Internet Users

Fixed Internet Revenues



GROSS REVENUES

\$275m



Y-o-Y
PERCENT CHANGE

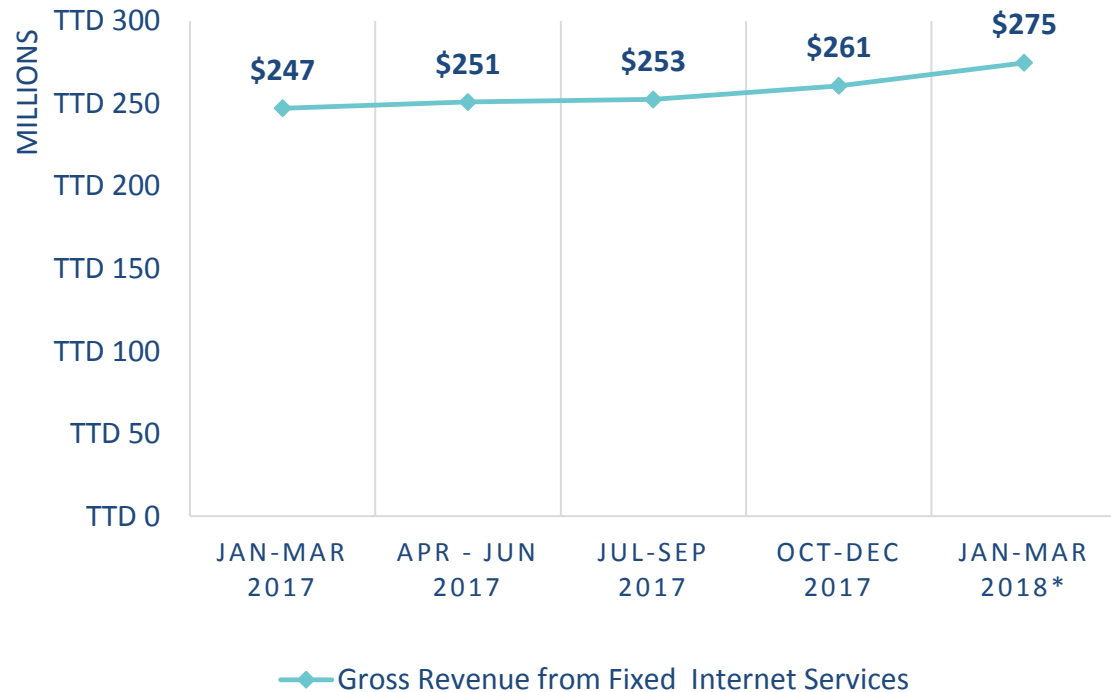
11.3%



Q-o-Q
PERCENT CHANGE

5.4%

GROSS REVENUES FROM FIXED INTERNET SERVICES
FROM Q1 2017 TO Q1 2018



** Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom*



HHI

3,158



Y-o-Y
PERCENT CHANGE

-32.2%

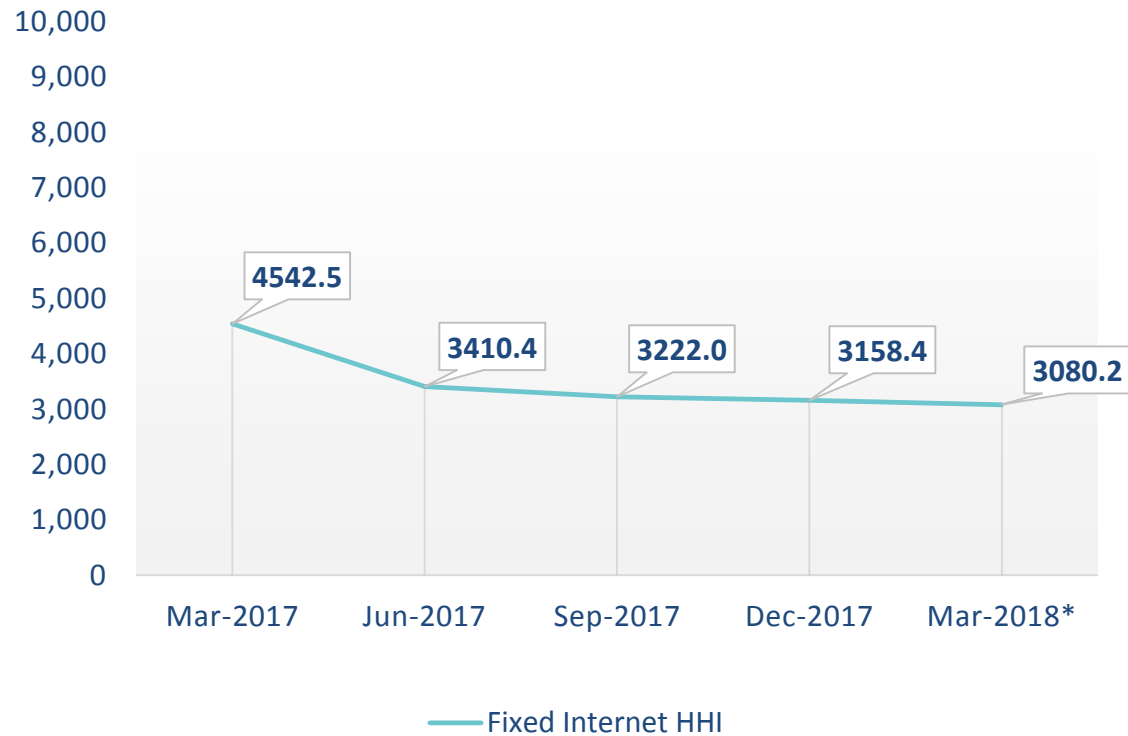


Q-o-Q
PERCENT CHANGE

-2.5%

Fixed Internet HHI

HHI FOR FIXED INTERNET SERVICES
FROM Q1 2017 TO Q1 2018



** Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom*

Fixed Internet Average Revenue Per User

ARPU

\$

\$806

Y-o-Y

PERCENT CHANGE

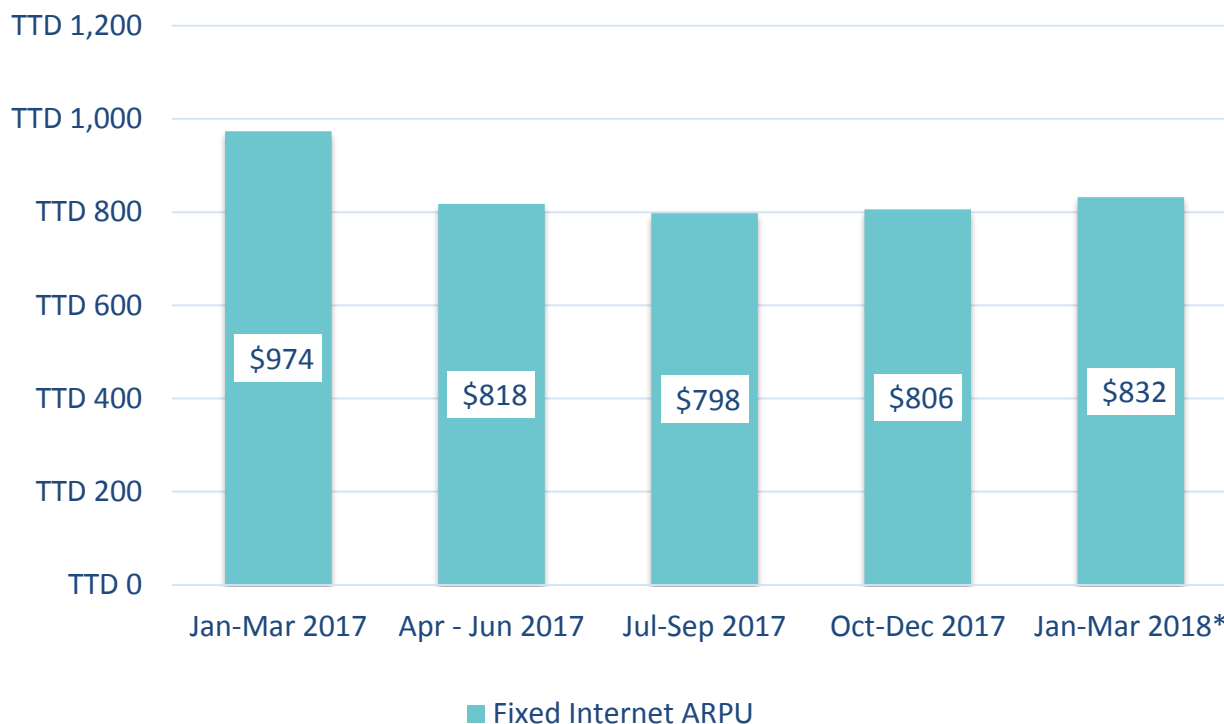
-14.6%

Q-o-Q

PERCENT CHANGE

3.2%

ARPU FOR FIXED INTERNET SERVICES
FROM Q1 2017 TO Q1 2018



* Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom

Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

248,400



Y-o-Y PERCENT CHANGE

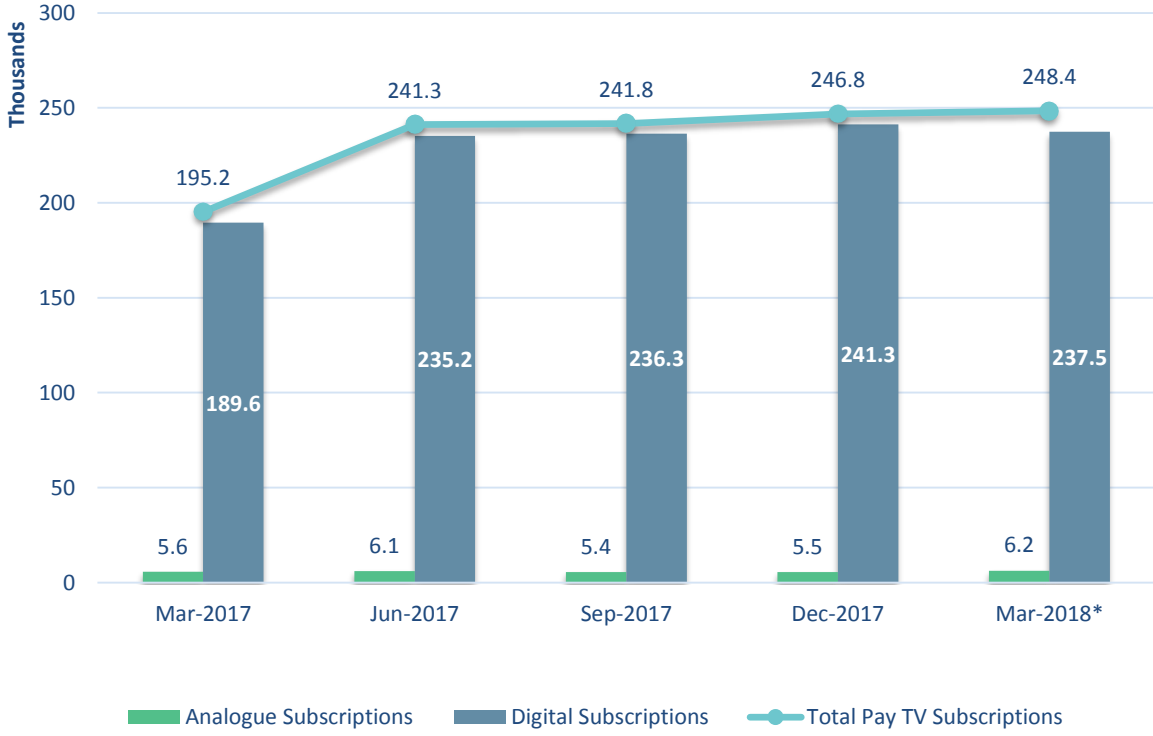
27.3%



Q-o-Q PERCENT CHANGE

0.6%

NUMBER OF PAY TV SUBSCRIPTIONS FROM Q1 2017 TO Q1 2018



• Data estimated for the following concessionaire who had not submitted data at the date of publication: TRICO Industries Limited

Pay TV Penetration



PAY TV
PENETRATION PER
100 INHABITANTS

17.7



Y-o-Y
PERCENT CHANGE

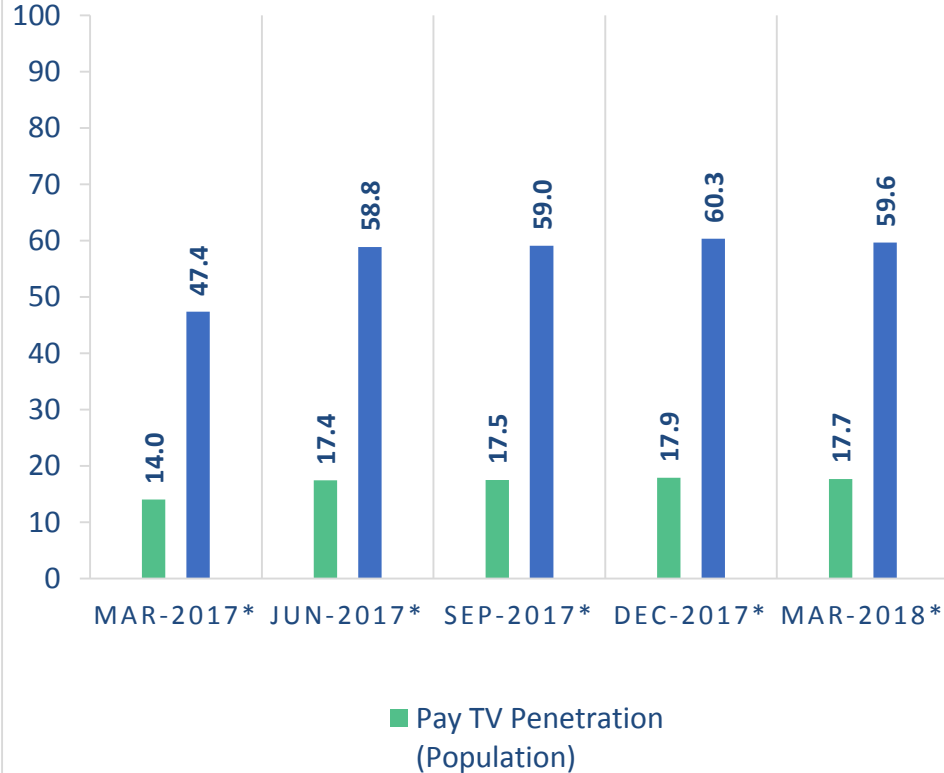
26.4%



Y-o-Y
PERCENT CHANGE

-1.1%

PENETRATION RATES OF PAY TV SERVICES
FROM Q1 2017 TO Q1 2018



PAY TV
PENETRATION PER
100 HOUSEHOLDS

59.6



Y-O-Y
PERCENT CHANGE

26.4%



Y-O-Y
PERCENT CHANGE

-0.7%

- Data estimated for the following concessionaire who had not submitted data at the date of publication: TRICO Industries Limited

Pay TV Revenues



GROSS REVENUES

\$180m



Y-o-Y
PERCENT CHANGE

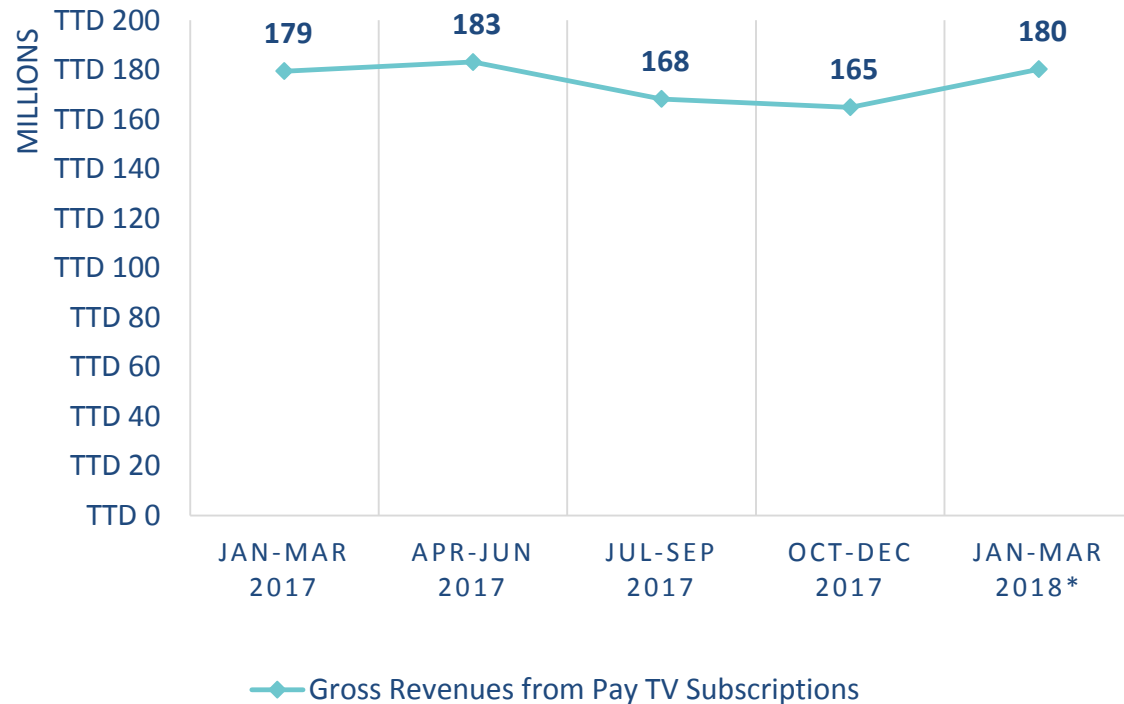
0.6%



Q-o-Q
PERCENT CHANGE

9.1%

GROSS REVENUES FROM PAY TV SERVICES
FROM Q1 2017 TO Q1 2018



- Data estimated for the following concessionaire who had not submitted data at the date of publication: TRICO Industries Limited

Pay TV HHI



HHI

2,173



Y-o-Y
PERCENT CHANGE

-46.6%



Q-o-Q
PERCENT CHANGE

-2.6%

HHI FOR PAY TV SERVICES
FROM Q1 2016 TO Q1 2018



• Data estimated for the following concessionaire who had not submitted data at the date of publication: TRICO Industries Limited

Pay TV

Average Revenue Per User

ARPU



\$737



Y-o-Y
PERCENT CHANGE

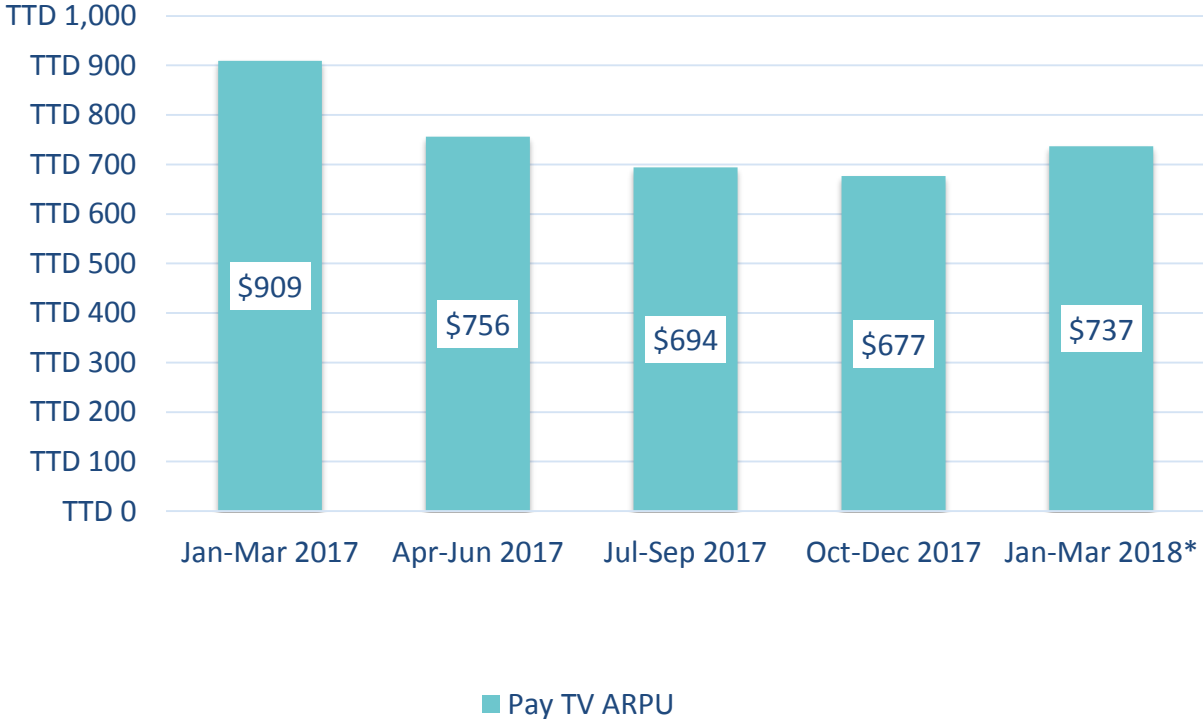
-18.9%



Q-o-Q
PERCENT CHANGE

8.9%

ARPU FOR PAY TV SERVICES
FROM Q1 2017 TO Q1 2018



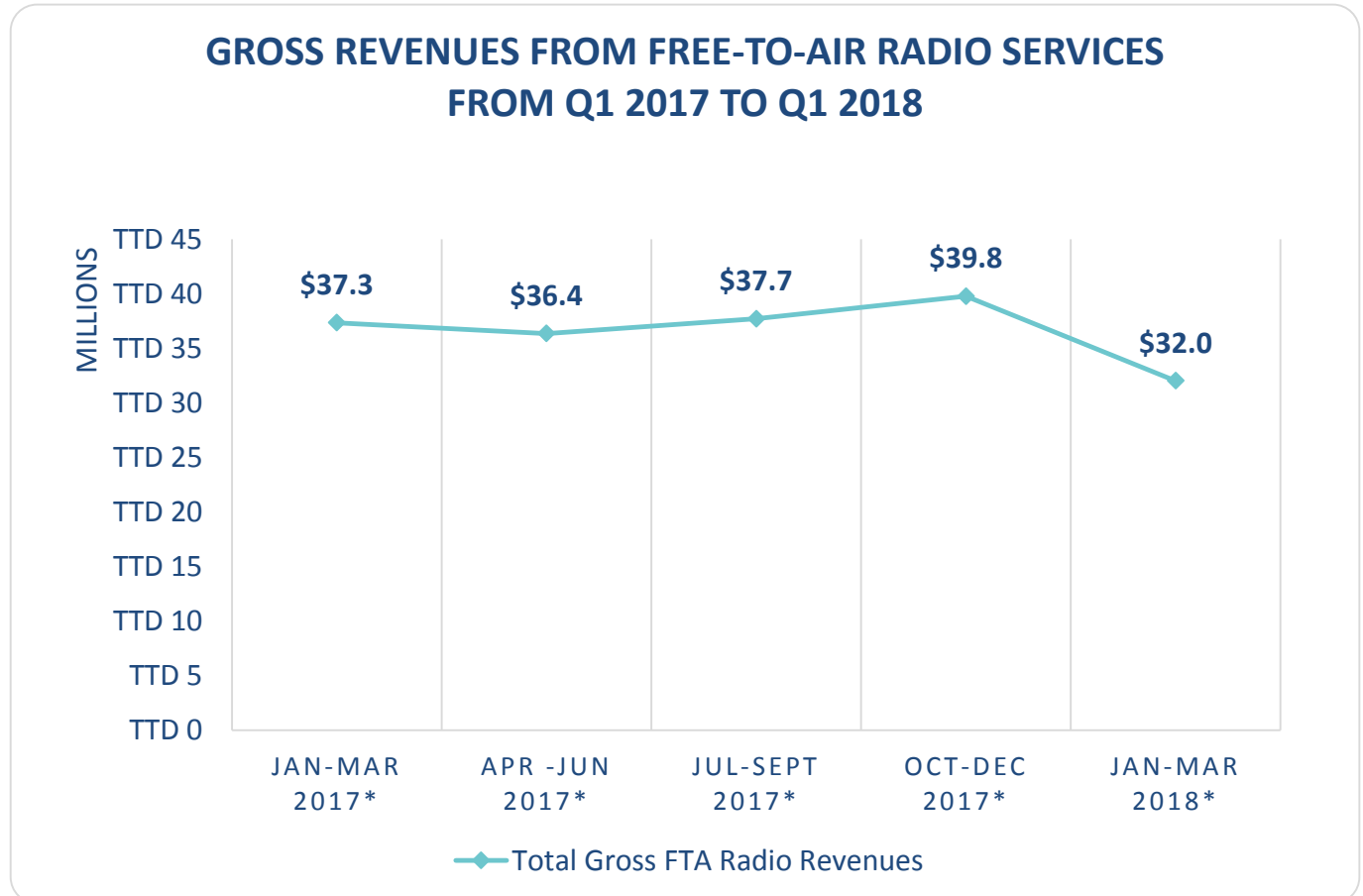
• Data estimated for the following concessionaire who had not submitted data at the date of publication: TRICO Industries Limited

Free-to-Air Radio Revenues

\$ GROSS REVENUES
\$43.3m

Y-o-Y
PERCENT CHANGE
-14.2%

Q-o-Q
PERCENT CHANGE
-19.6%



• *Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca Productions Limited, Trinibashment Limited, Radio Toco, and Upward Trend Entertainment Limited*

Free-to-Air Radio HHI



HHI

855



Y-o-Y
PERCENT CHANGE

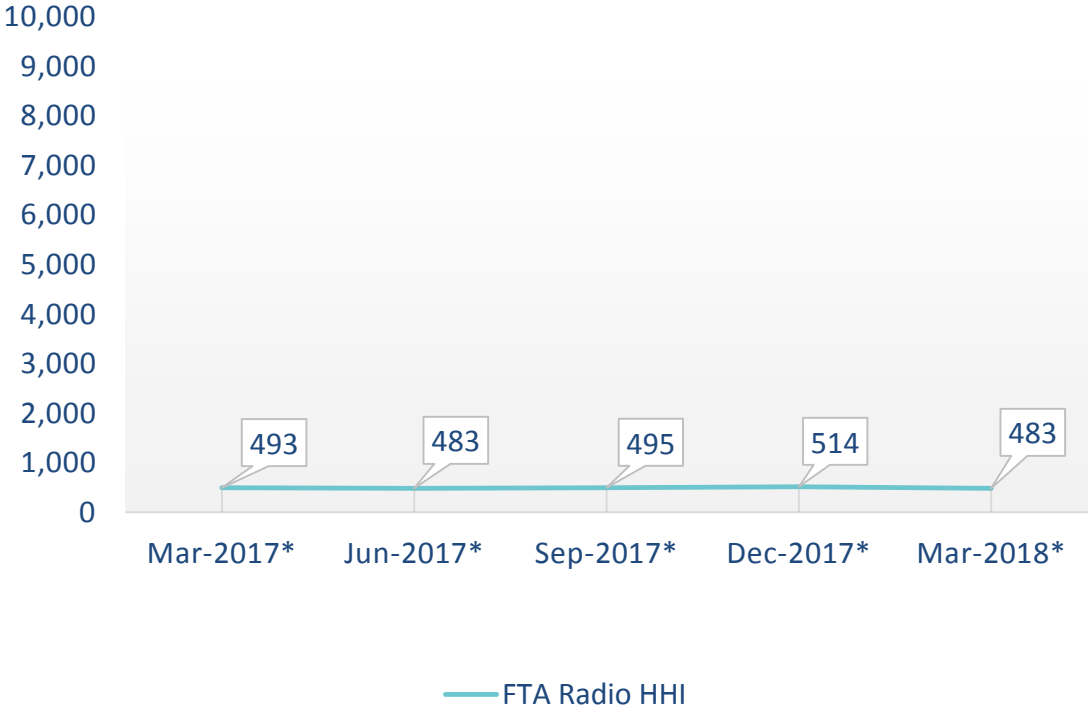
-2.0%



Q-o-Q
PERCENT CHANGE

-6.0%

HHI FOR FREE-TO-AIR RADIO SERVICES FROM Q1 2017 TO Q1 2018



• Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca Productions Limited, Trinibashment Limited, Radio Toco, and Upward Trend Entertainment Limited

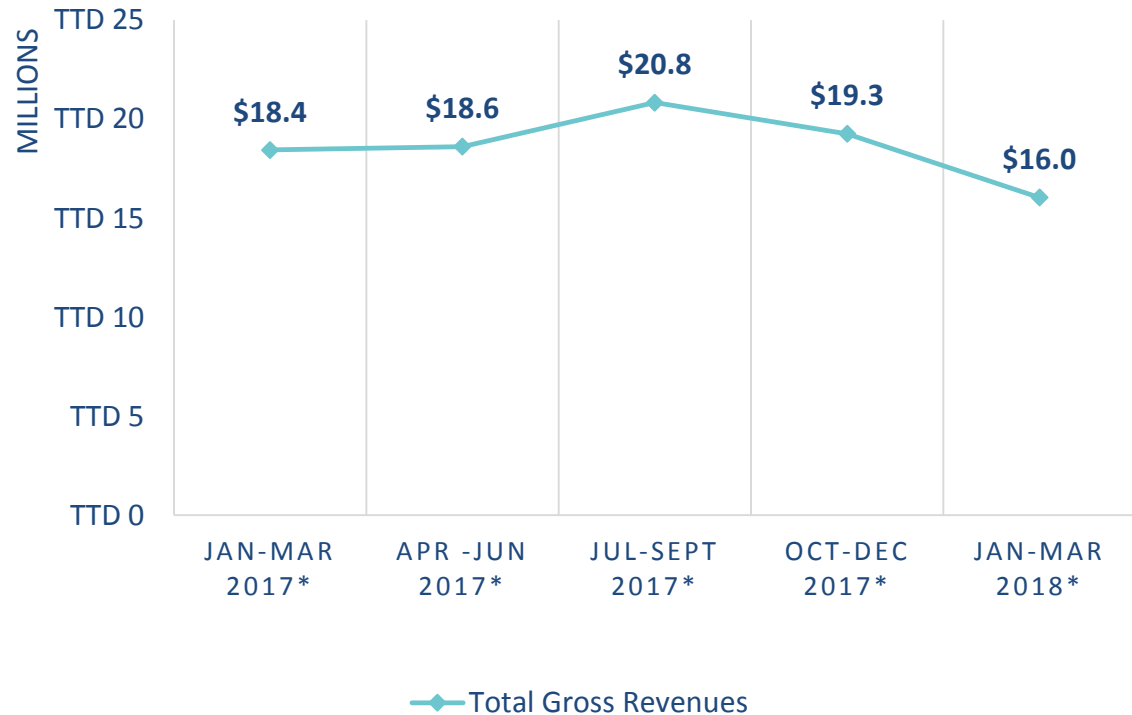
Free-to-Air TV Revenues

\$ GROSS REVENUES
\$16.0m

Y-o-Y
PERCENT CHANGE
-13.0%

Q-o-Q
PERCENT CHANGE
-17.0%

GROSS REVENUES FROM FREE-TO-AIR TV SERVICES
FROM Q1 2017 TO Q1 2018



- *Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network Television and IBN.*

Free-to-Air TV HHI



HHI

3,808



Y-o-Y
PERCENT CHANGE

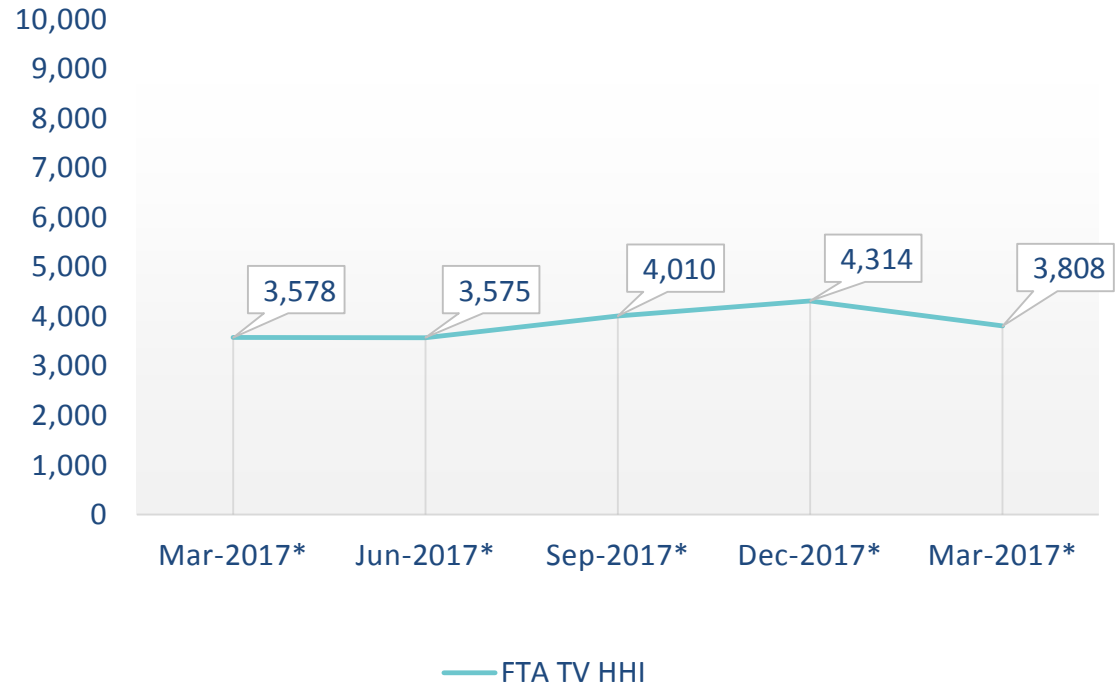
6.4%



Q-o-Q
PERCENT CHANGE

-11.7%

HHI FOR FREE-TO-AIR TV SERVICES FROM Q1 2017 TO Q1 2018



- *Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network Television and IBN.*



QUARTERLY MARKET UPDATE

January to March 2018