



QUARTERLY MARKET UPDATE

April to June 2018

Quarterly Market Update – Q2 2018

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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. In 2018, the Authority received revised data for the period 2016 and 2017. The new data has been incorporated in this Report and accounts for any differences between the 2016 and 2017 Quarterly Reports.

Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

320,000



Y-o-Y PERCENT CHANGE

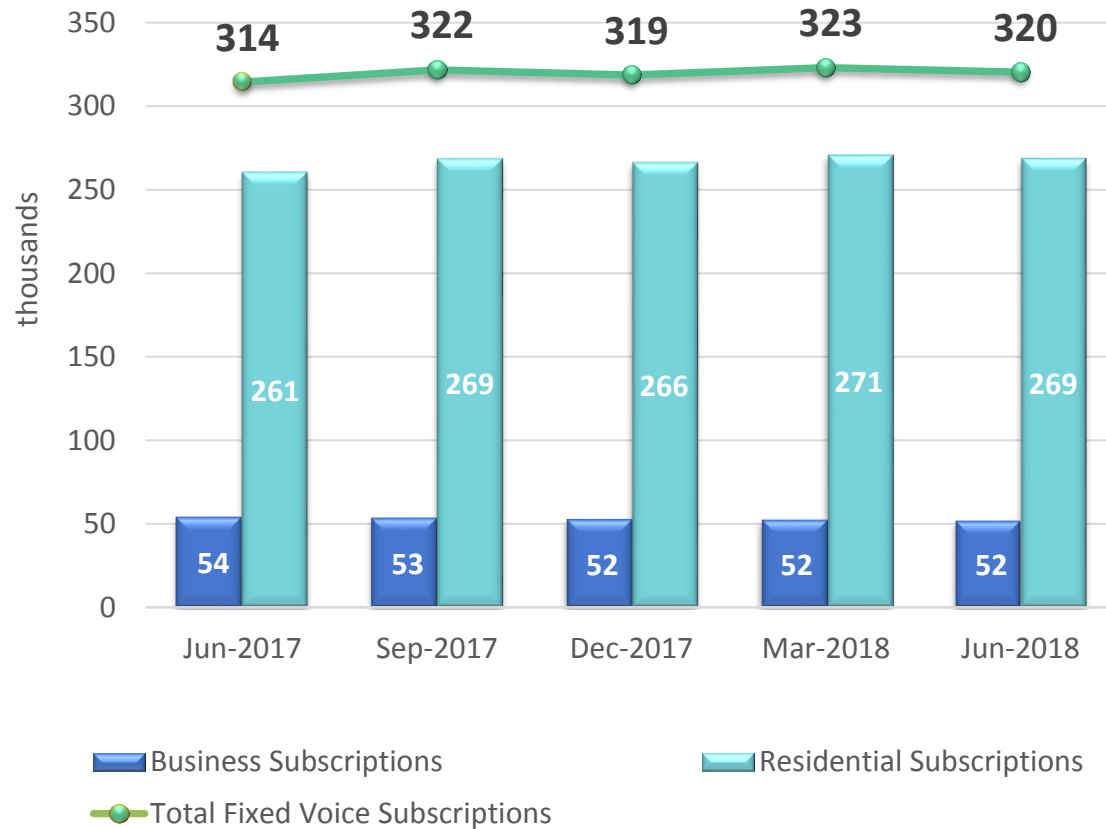
1.9%



Q-o-Q PERCENT CHANGE

-0.9%

Number of Fixed Line Subscriptions
Q2 2017 to Q2 2018



Fixed Voice Penetration

FIXED VOICE
PENETRATION PER
100 INHABITANTS

23.7

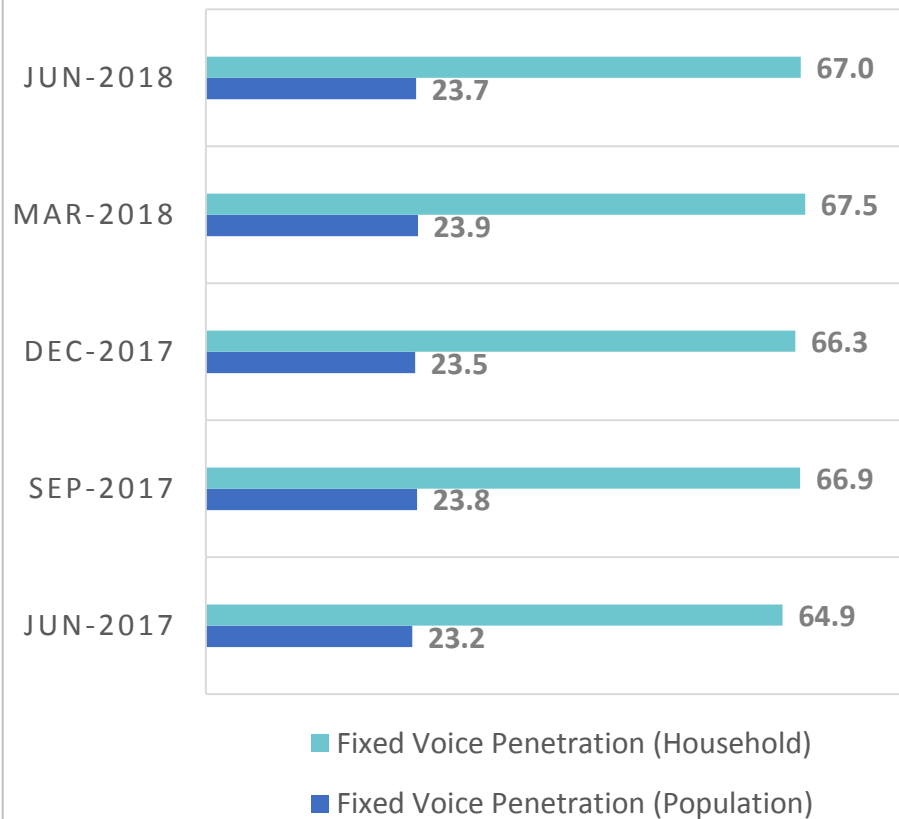
Y-o-Y
PERCENT CHANGE

2.2%

Q-o-Q
PERCENT CHANGE

-0.8%

Penetration rate for fixed voice
subscriptions -
Q2 2017 to Q2 2018



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

67.0

Y-o-Y
PERCENT CHANGE

3.2%

Q-o-Q
PERCENT CHANGE

-0.7%

Fixed Voice Revenues



GROSS REVENUES

\$147.0m



Y-o-Y
PERCENT CHANGE

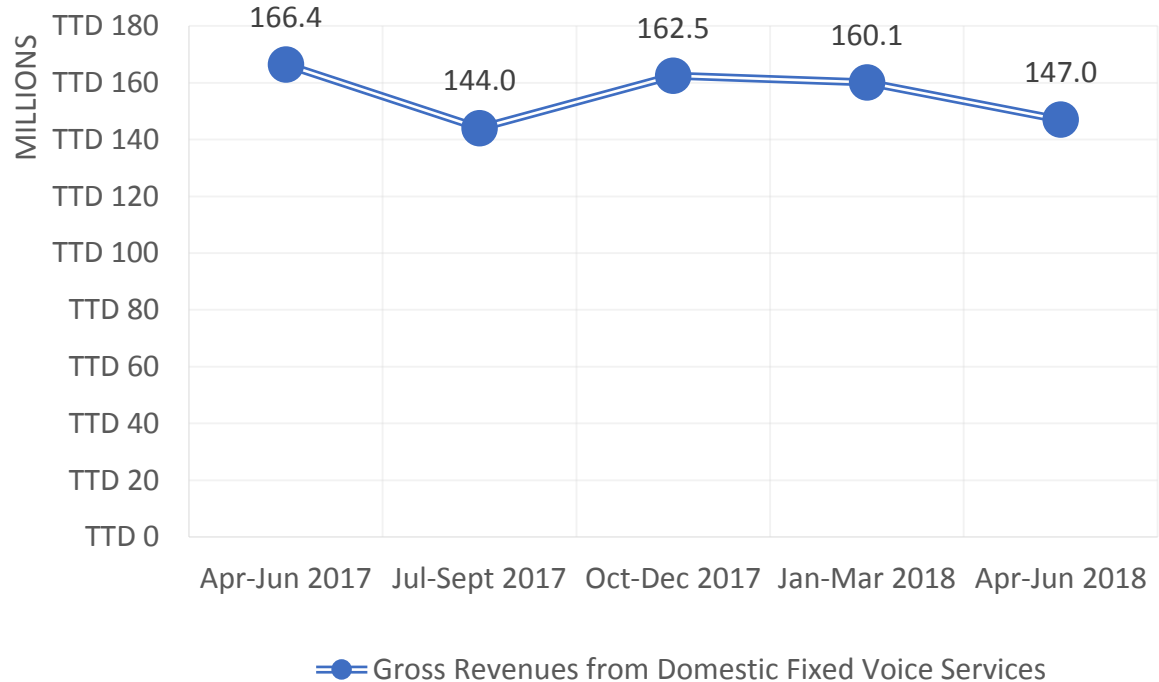
-11.7%



Q-o-Q
PERCENT CHANGE

-8.2%

Number of fixed line subscriptions gross revenues from domestic fixed voice services - Q2 2017 to Q2 2018



Fixed Voice HHI



HHI

4,299



Y-o-Y
PERCENT CHANGE

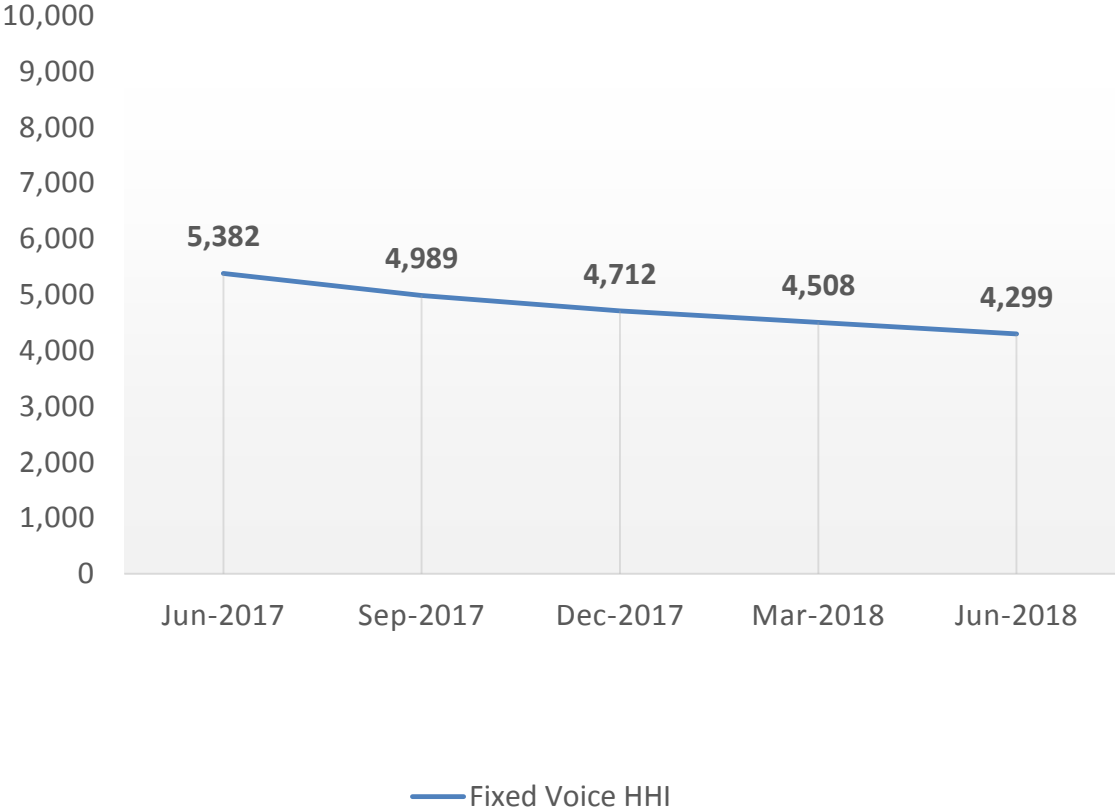
-19.3%



Q-o-Q
PERCENT CHANGE

-34.2%

HHI for Domestic Fixed Voice -
Q2 2017 to Q2 2018



Fixed Voice Average Revenue Per User

ARPU

\$

\$461

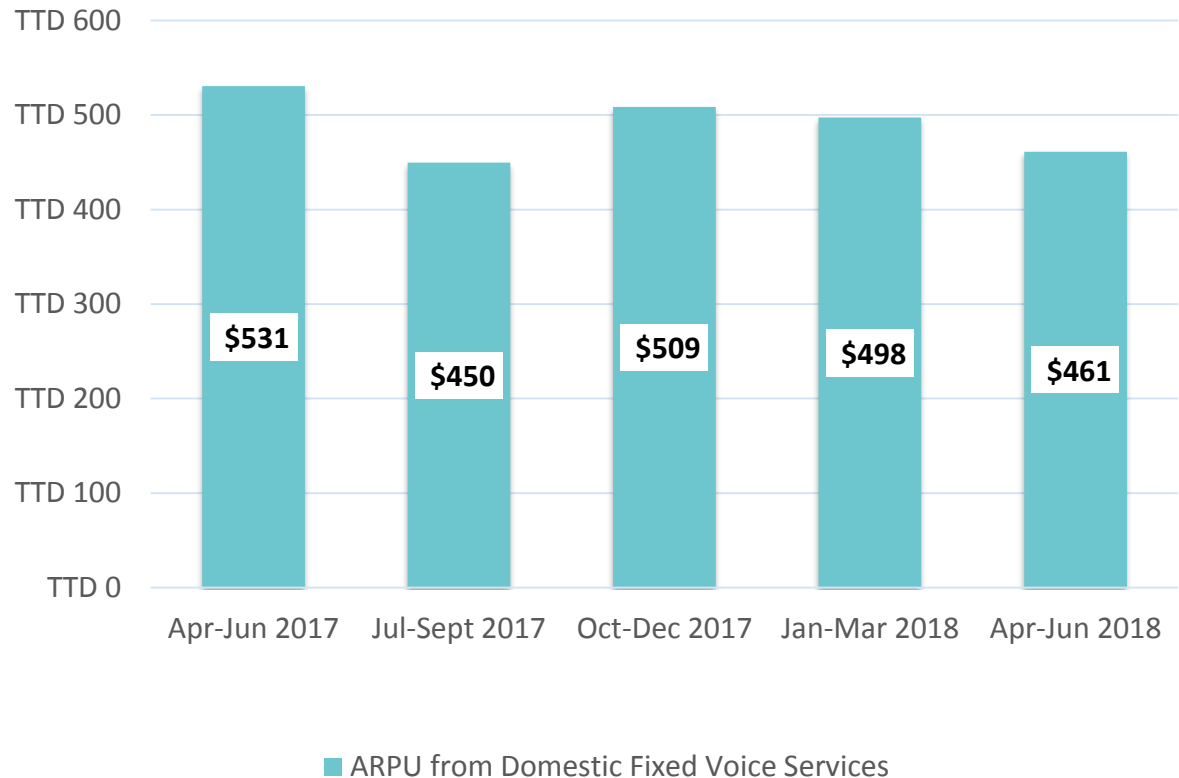
Y-o-Y
PERCENT CHANGE

-20.1%

Q-o-Q
PERCENT CHANGE

-4.6%

ARPU for Domestic Fixed Voice -
Q2 2017 to Q2 2018



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,027,000



Y-o-Y PERCENT CHANGE

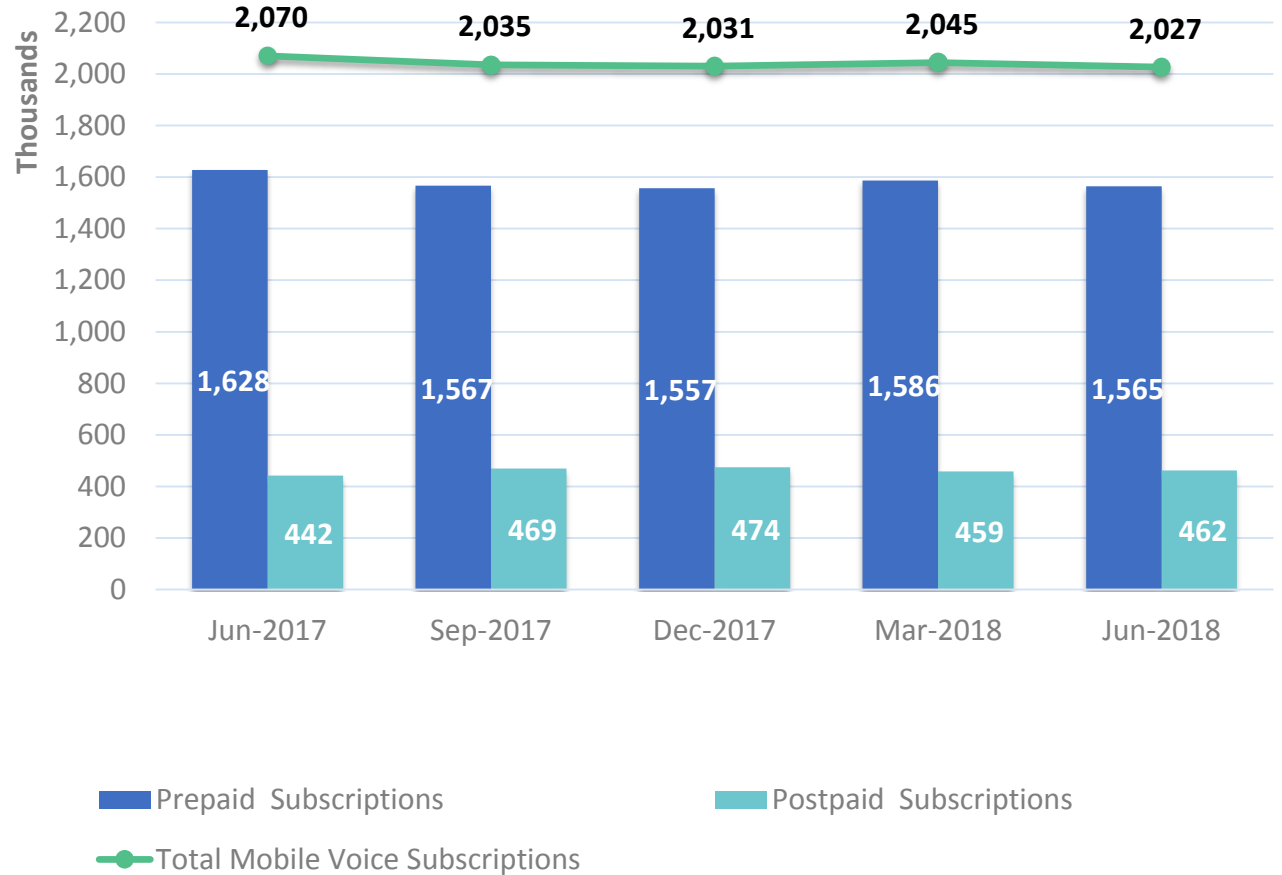
-2.1%



Q-o-Q PERCENT CHANGE

0.9%

Number of Mobile Voice Subscriptions - Q2 2017 to Q2 2018



Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

150



Y-o-Y
PERCENT CHANGE

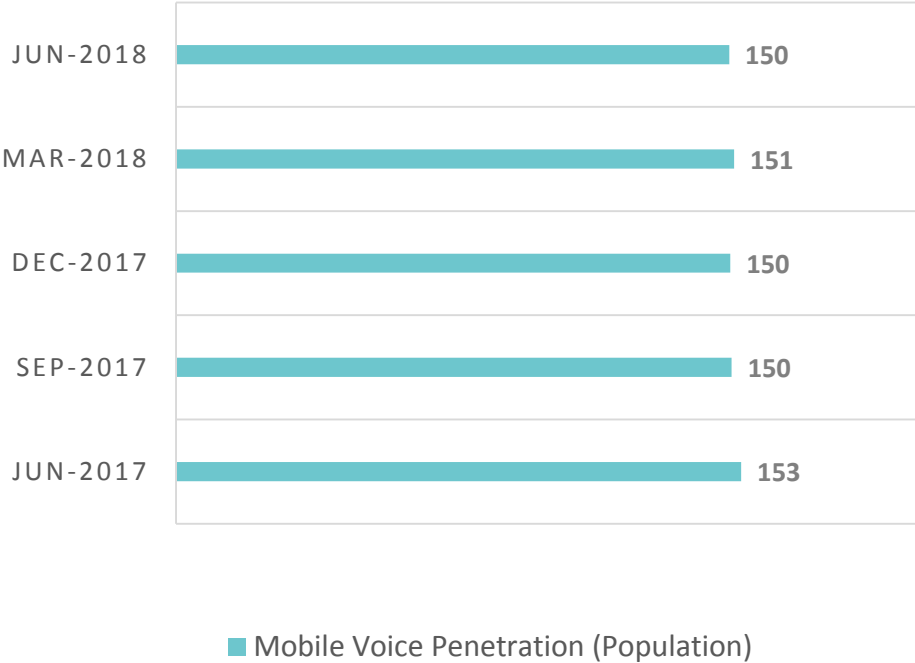
-2.0%



Y-o-Y
PERCENT CHANGE

0.7%

Penetration of mobile voice subscriptions -
Q2 2017 to Q2 2018



Mobile Services Revenues

\$

GROSS REVENUES

\$479m

Y-o-Y
PERCENT CHANGE

Y-o-Y
PERCENT CHANGE

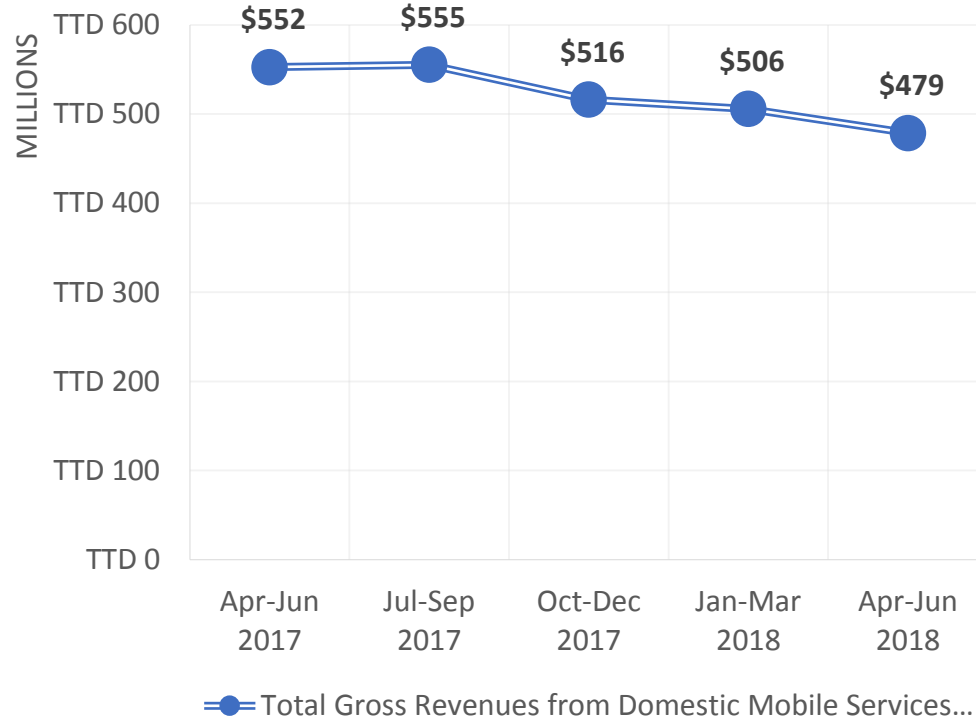
-13.2%

Q-o-Q
PERCENT CHANGE

Q-o-Q
PERCENT CHANGE

-5.3%

Total gross revenues from domestic mobile services
Q2 2017 to Q2 2018



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,057



Y-o-Y
PERCENT CHANGE

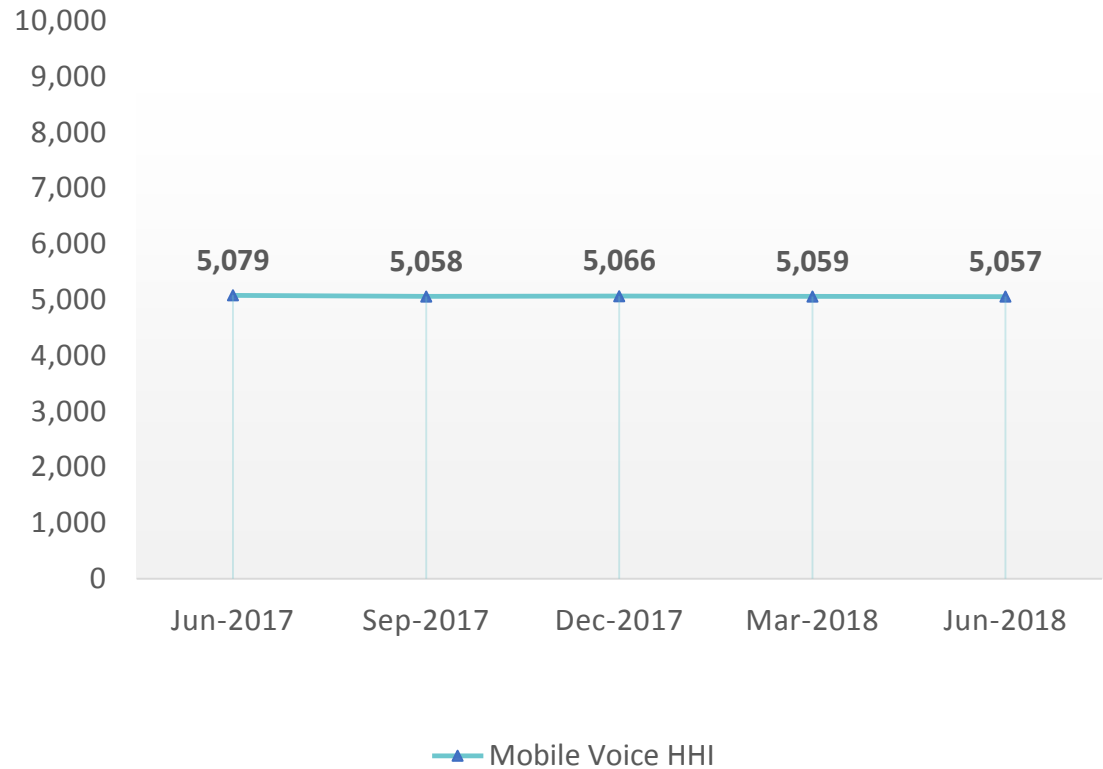
-0.4%



Q-o-Q
PERCENT CHANGE

-0.1%

HHI for Domestic Mobile Services -
Q2 2017 to Q2 2018



Average Revenue Per User

Mobile Services



ARPU

\$235



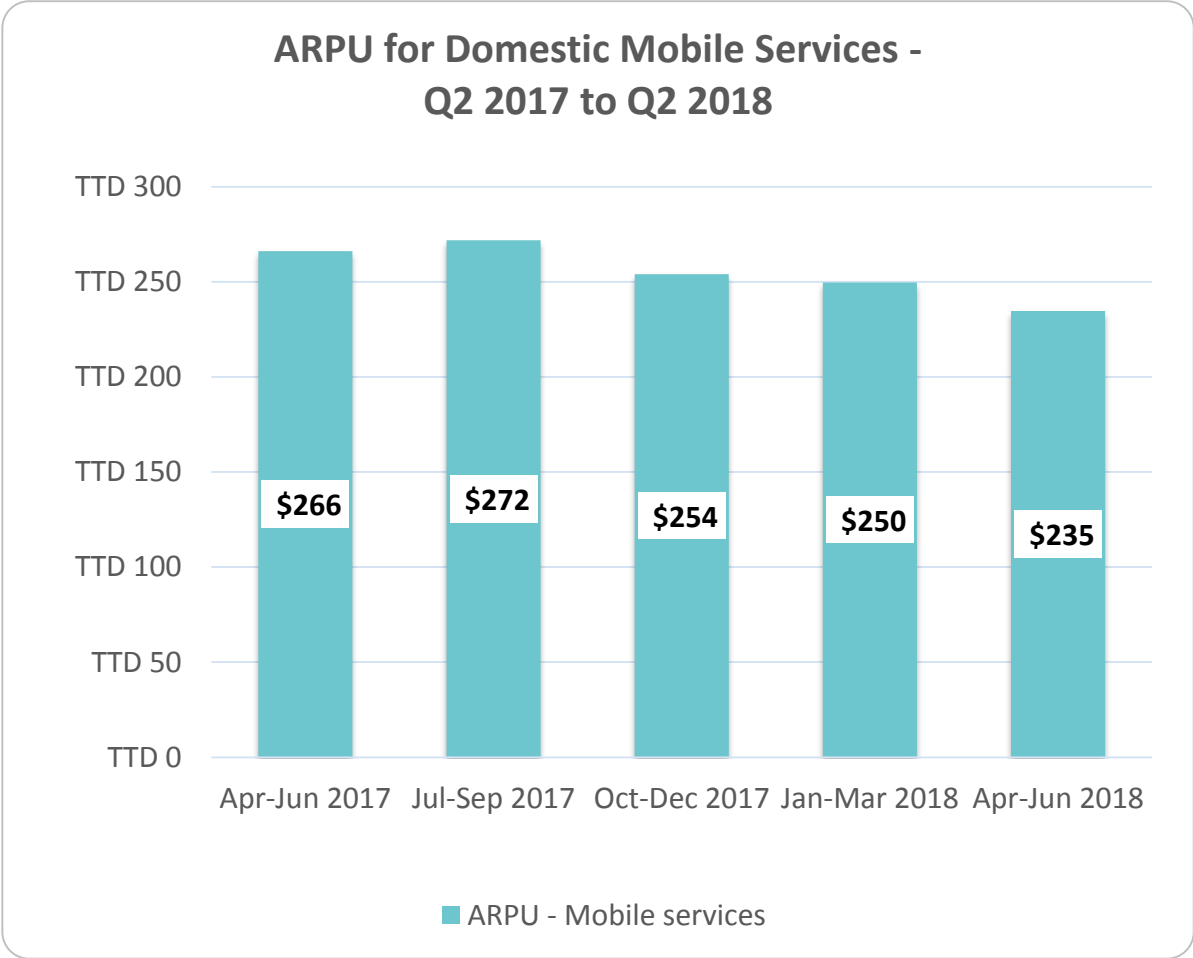
Y-o-Y
PERCENT CHANGE

-11.7%



Q-o-Q
PERCENT CHANGE

-6.0%



Fixed Broadband Subscriptions

TOTAL NUMBER OF
SUBSCRIPTIONS

342,000

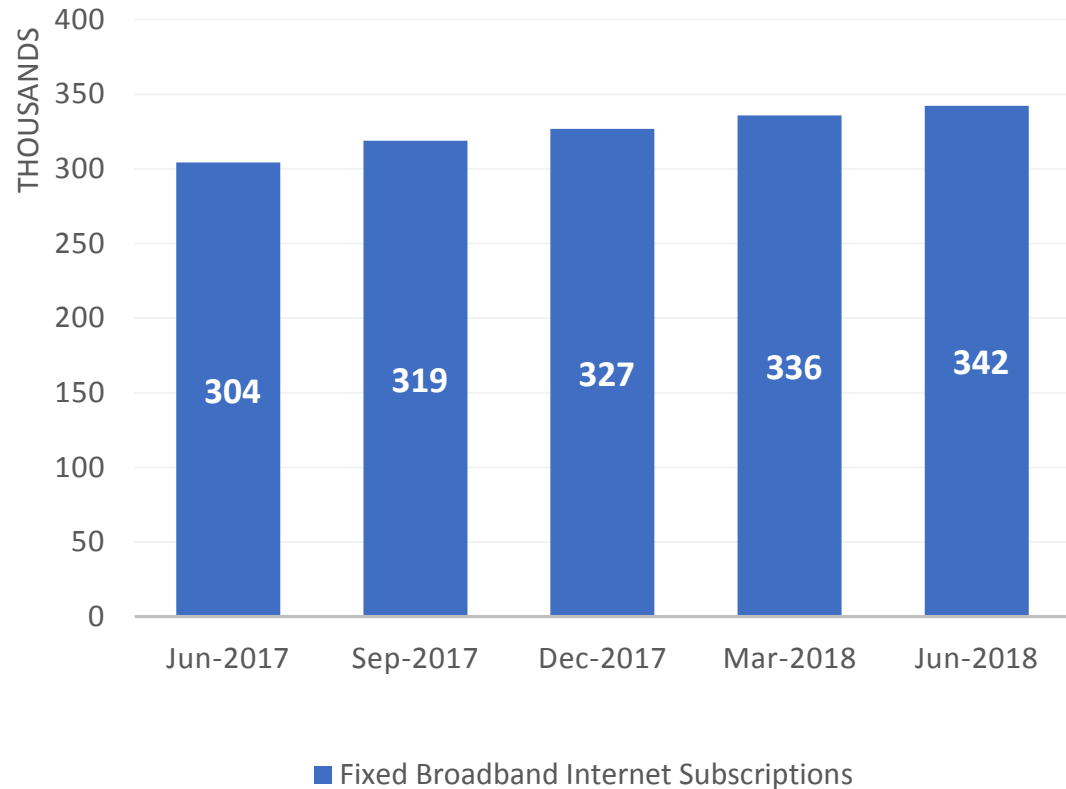
Y-o-Y
PERCENT CHANGE

12.5%

Q-o-Q
PERCENT CHANGE

1.8%

Number of Fixed Internet Subscriptions -
Q2 2017 to Q2 2018



Fixed Internet Penetration



FIXED INTERNET
PENETRATION PER
100 INHABITANTS

25.3



Y-o-Y
PERCENT CHANGE

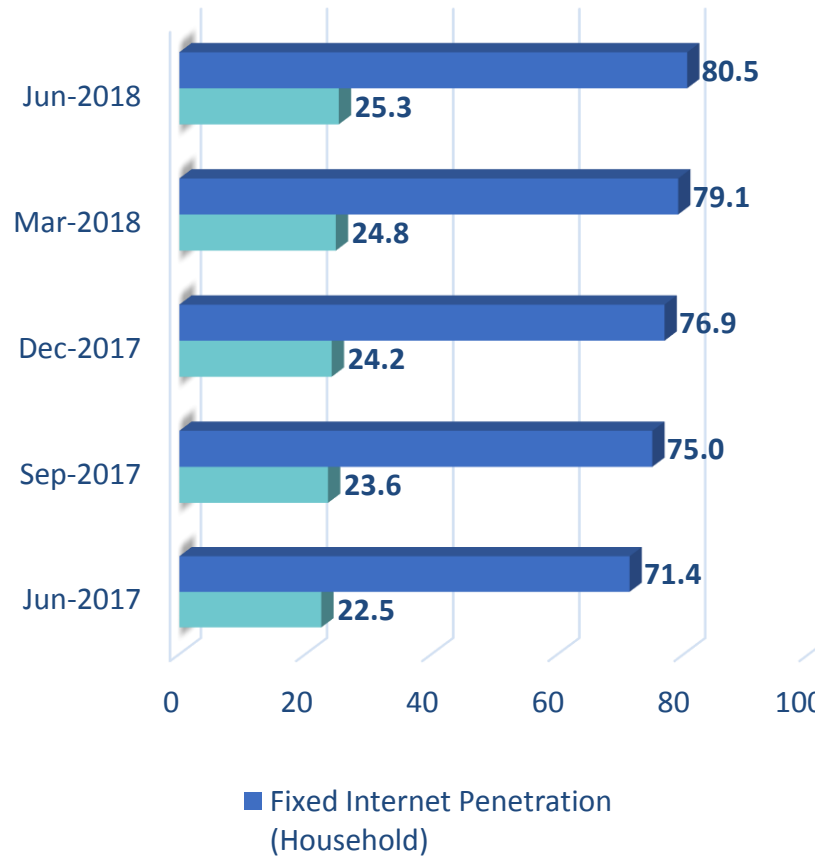
22.5%



Y-o-Y
PERCENT CHANGE

2.0%

Penetration for fixed internet subscriptions -
Q2 2017 to Q2 2018



FIXED INTERNET
PENETRATION PER
100 HOUSEHOLDS

80.5



Y-O-Y
PERCENT CHANGE

12.7%



Y-O-Y
PERCENT CHANGE

1.8%

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

47.6

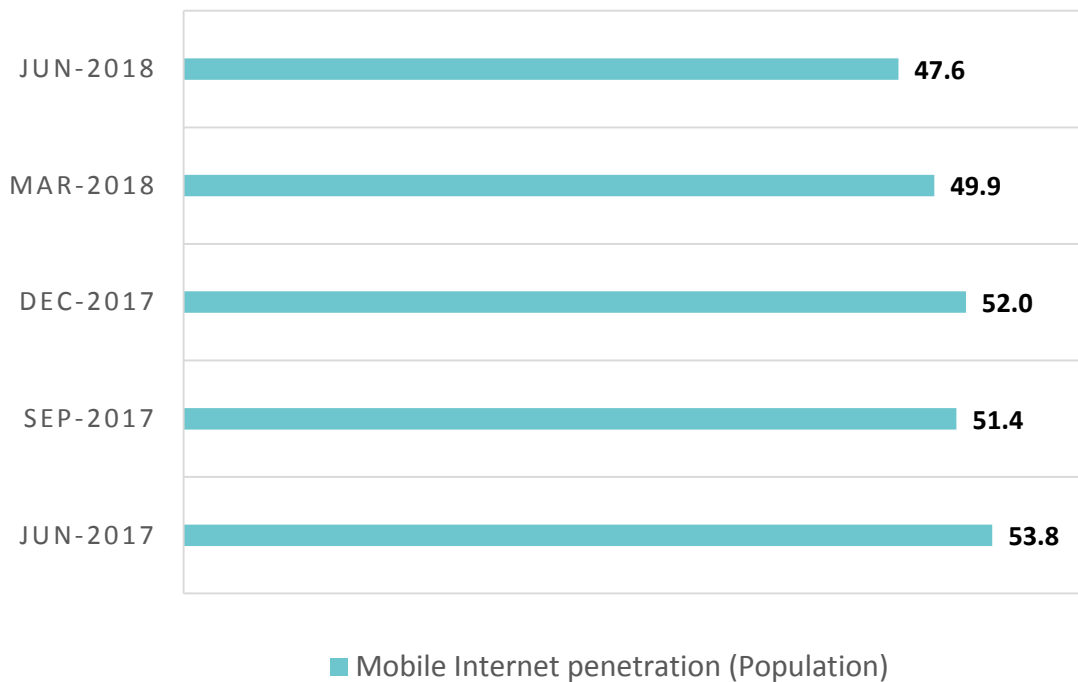
Y-o-Y
PERCENT CHANGE

-11.5%

Y-o-Y
PERCENT CHANGE

-4.6%

Penetration for mobile internet subscriptions -
Q2 2017 to Q2 2018



Calculated using the total number of active Prepaid and Postpaid Mobile Internet users divided by the population

Fixed Internet Revenues



GROSS REVENUES

\$287m



Y-o-Y
PERCENT CHANGE

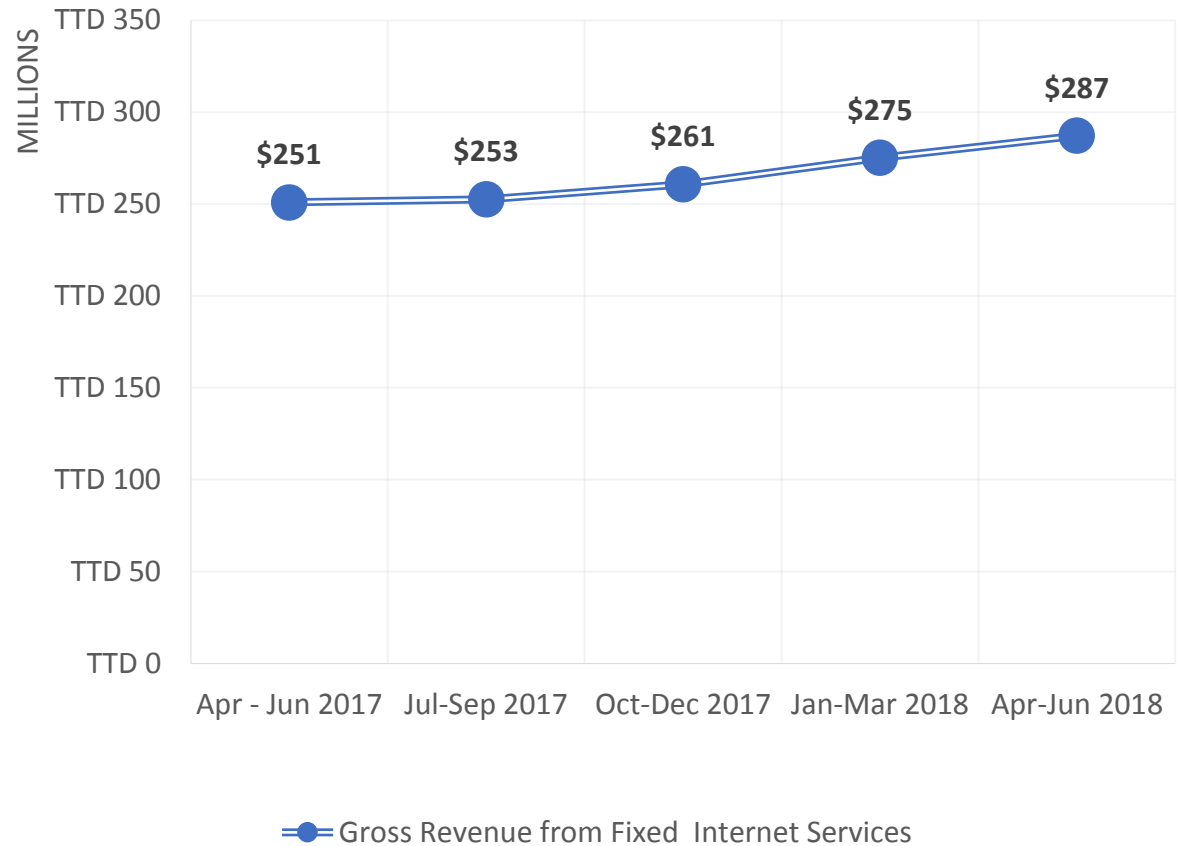
14.3%



Q-o-Q
PERCENT CHANGE

4.4%

Gross revenues from fixed internet services -
Q2 2017 to Q2 2018



Fixed Internet HHI



HHI

3,029



Y-o-Y
PERCENT CHANGE

-11.2%



Q-o-Q
PERCENT CHANGE

-1.5%

HHI for Fixed Internet Services -
Q2 2017 to Q2 2018



Fixed Internet Average Revenue Per User

ARPU

\$

\$846

Y-o-Y

PERCENT CHANGE

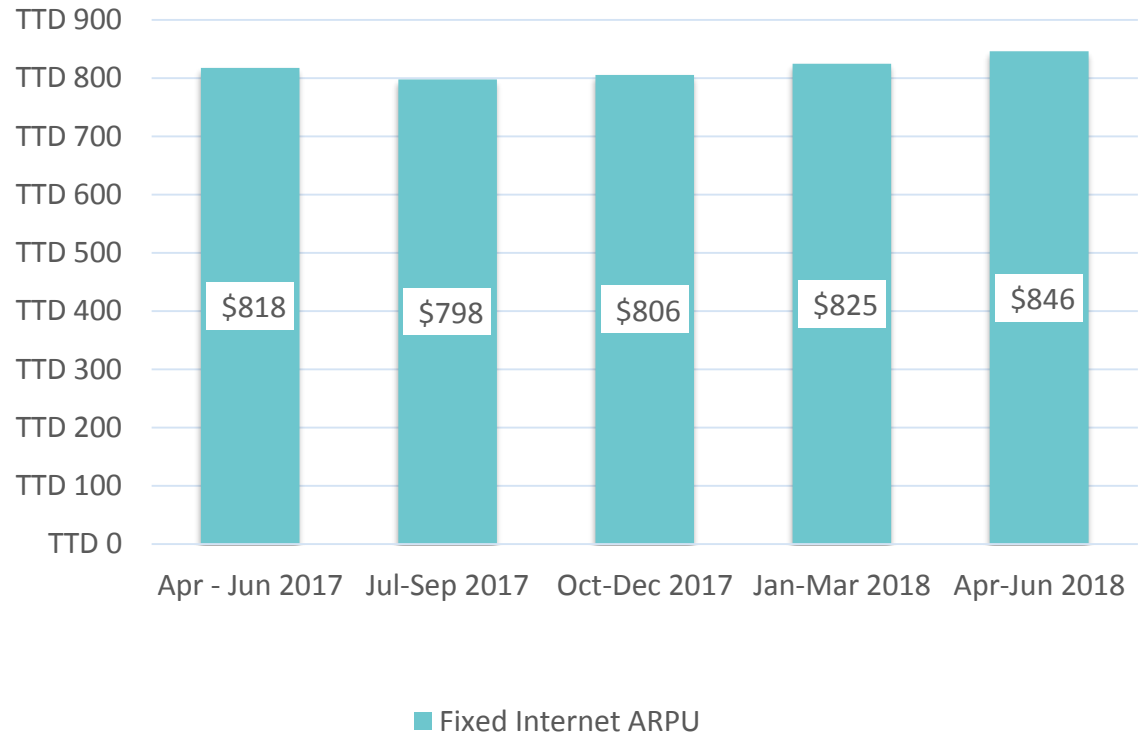
3.4%

Q-o-Q

PERCENT CHANGE

2.5%

ARPU for Fixed Internet Services -
Q2 2017 to Q2 2018



Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

251,000



Y-o-Y PERCENT CHANGE

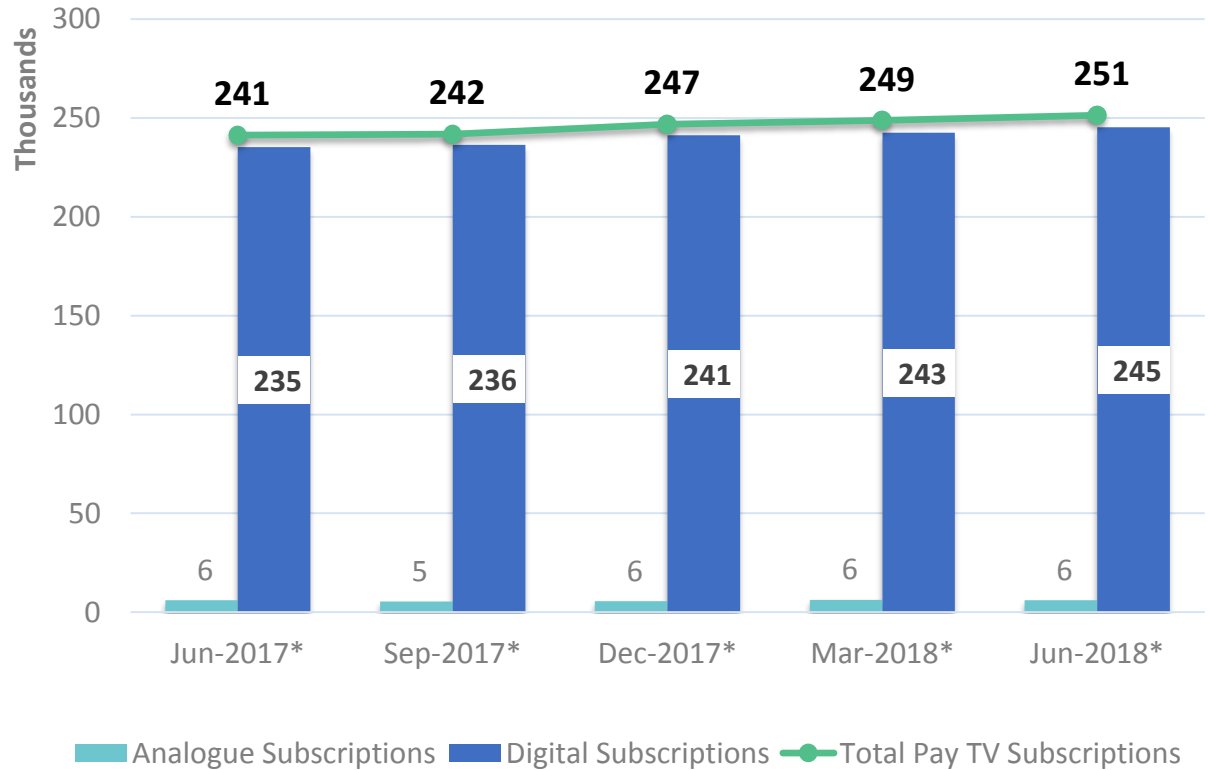
4.1%



Q-o-Q PERCENT CHANGE

0.8%

Number of Pay TV Subscriptions - Q2 2017 to Q2 2018



- Data estimated for the following concessionaires who had not submitted data at the date of publication: TRICO Industries Limited and Network Technologies Limited

Pay TV Penetration



PAY TV
PENETRATION PER
100 INHABITANTS

18.2



Y-o-Y
PERCENT CHANGE

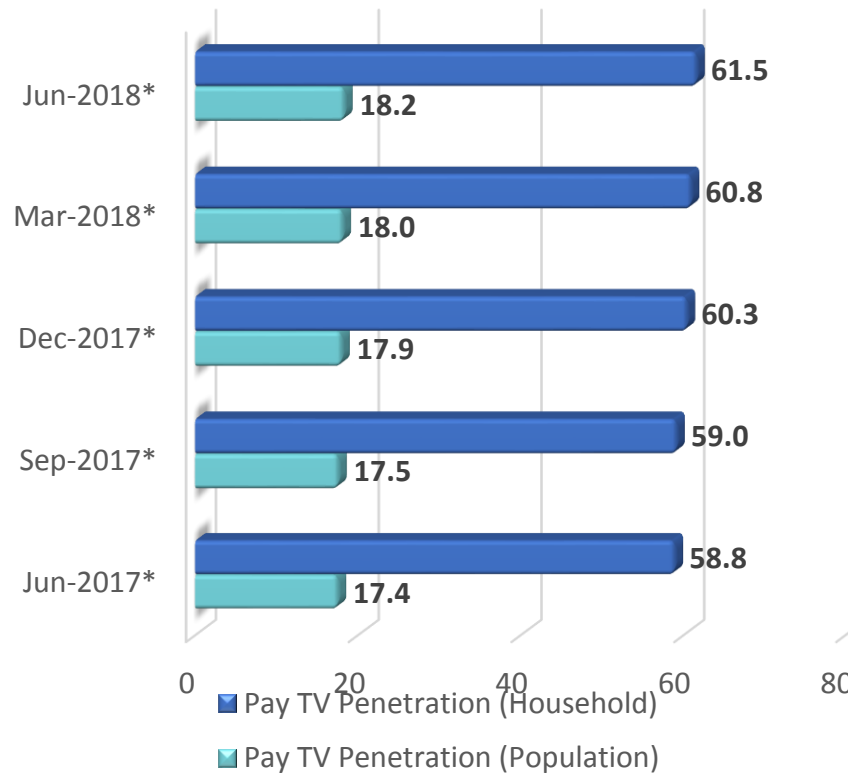
4.6%



Y-o-Y
PERCENT CHANGE

1.1%

Penetration Rates of Pay TV Subscriptions
Q2 2016 to Q2 2017



PAY TV
PENETRATION PER
100 HOUSEHOLDS

61.5



Y-O-Y
PERCENT CHANGE

4.6%



Y-O-Y
PERCENT CHANGE

1.2%

- *Data estimated for the following concessionaires who had not submitted data at the date of publication: TRICO Industries Limited and Network Technologies Limited*

Pay TV Revenues



GROSS REVENUES

\$174m



Y-o-Y
PERCENT CHANGE

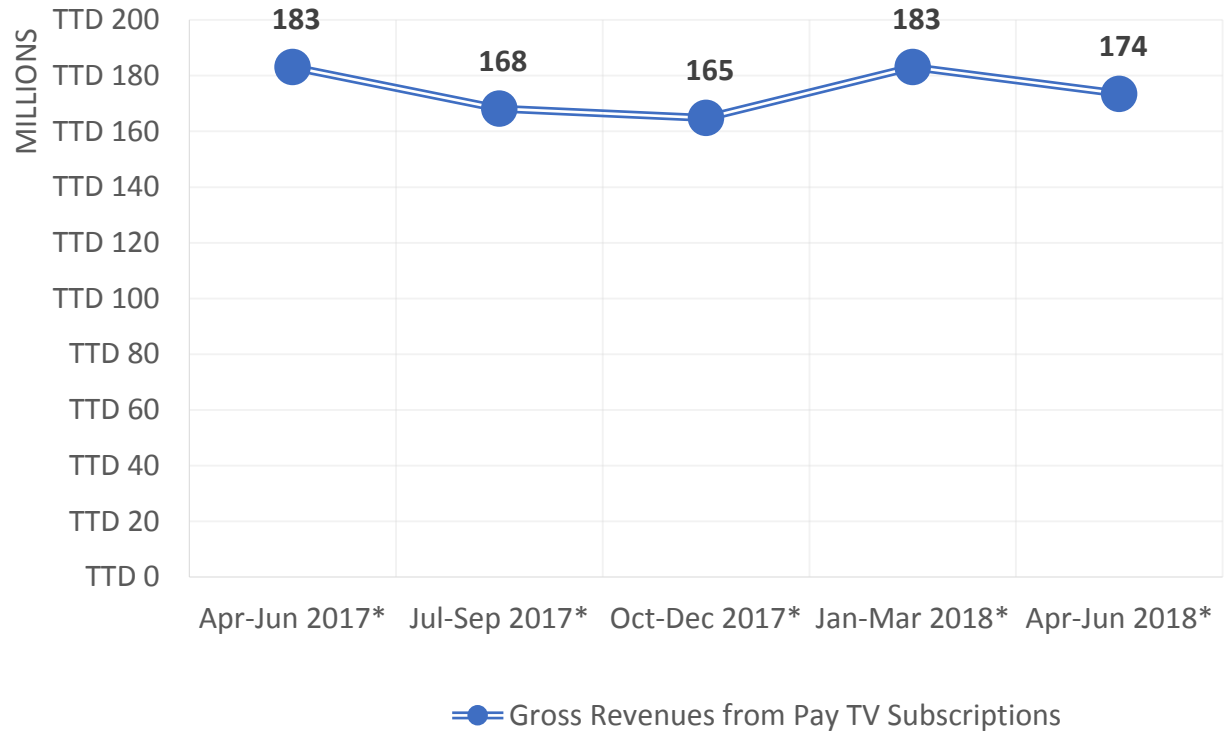
-4.9%



Q-o-Q
PERCENT CHANGE

-4.9%

Gross revenues from pay TV services -
Q2 2017 to Q2 2018



- *Data estimated for the following concessionaires who had not submitted data at the date of publication: TRICO Industries Limited and Network Technologies Limited*

Pay TV HHI



HHI

3,032



Y-o-Y
PERCENT CHANGE

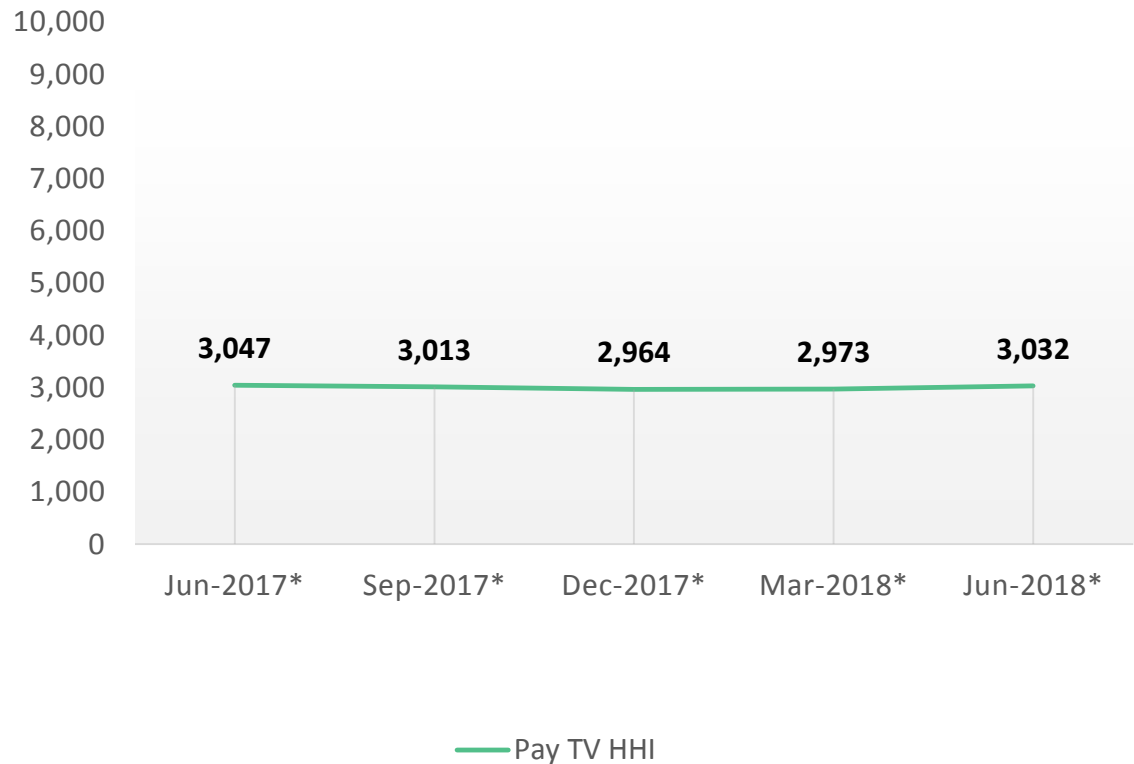
-0.5%



Q-o-Q
PERCENT CHANGE

-2.0%

HHI for Subscription TV Services -
Q2 2017 to Q2 2018



- *Data estimated for the following concessionaires who had not submitted data at the date of publication: TRICO Industries Limited and Network Technologies Limited*

Pay TV

Average Revenue Per User

ARPU

\$

\$696

Y-o-Y

PERCENT CHANGE

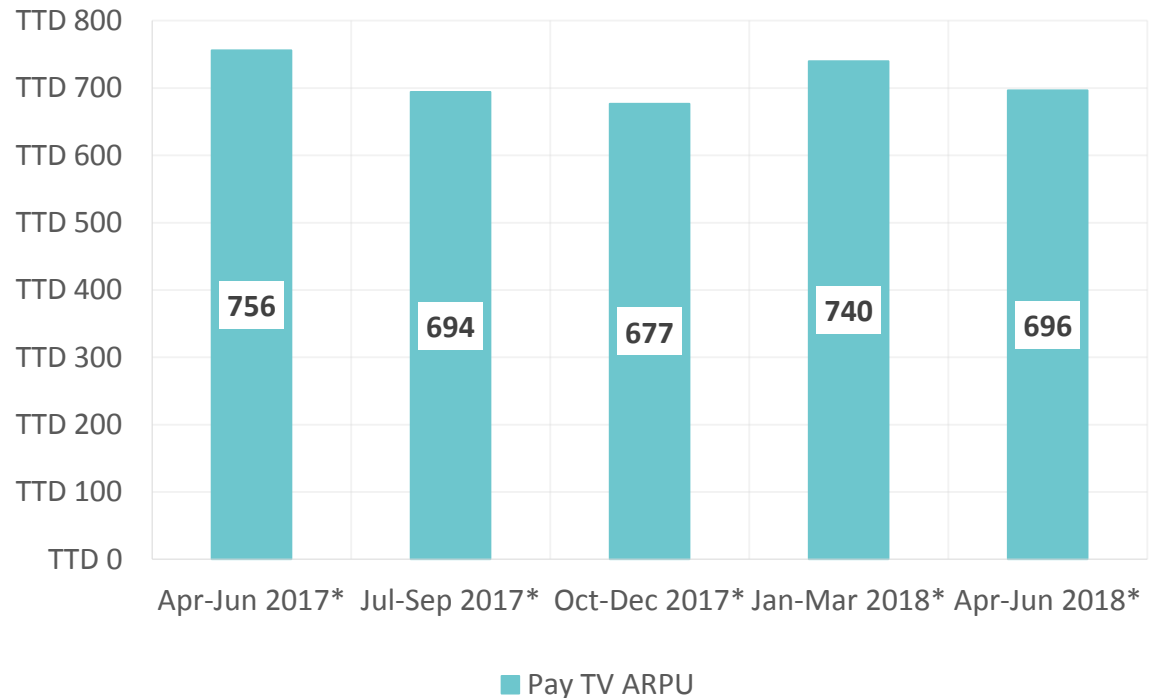
-7.9%

Q-o-Q

PERCENT CHANGE

-5.9%

ARPU for pay TV
Q2 2017 to Q2 2018



• *Data estimated for the following concessionaires who had not submitted data at the date of publication: TRICO Industries Limited and Network Technologies Limited*

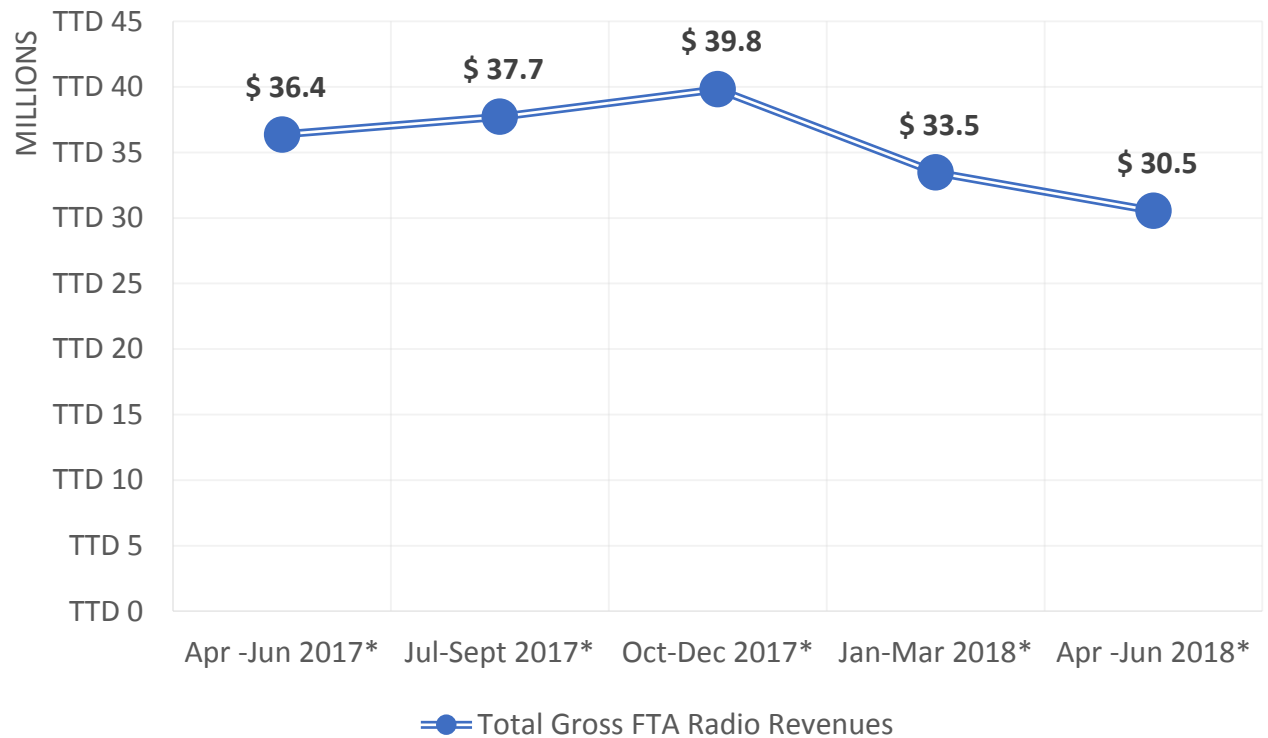
Free-to-Air Radio Revenues

\$ GROSS REVENUES
\$30.5m

Y-o-Y
PERCENT CHANGE
-16.2%

Q-o-Q
PERCENT CHANGE
-9.0%

Gross revenues from free-to-air radio services -
Q2 2017 to Q2 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*

TATT: 2/10/1/3

Free-to-Air Radio HHI



HHI

591



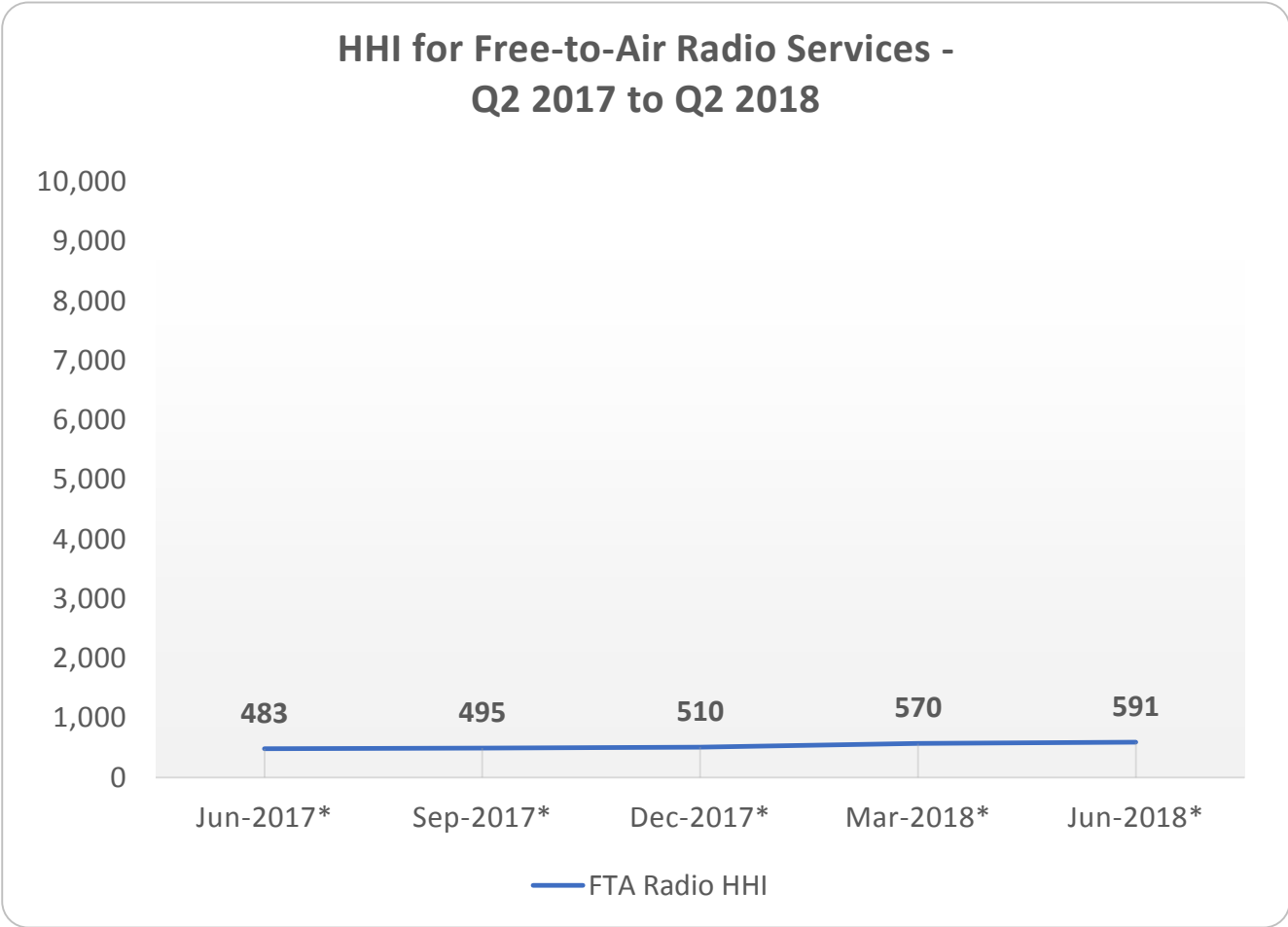
Y-o-Y
PERCENT CHANGE

22.4%



Q-o-Q
PERCENT CHANGE

3.7%

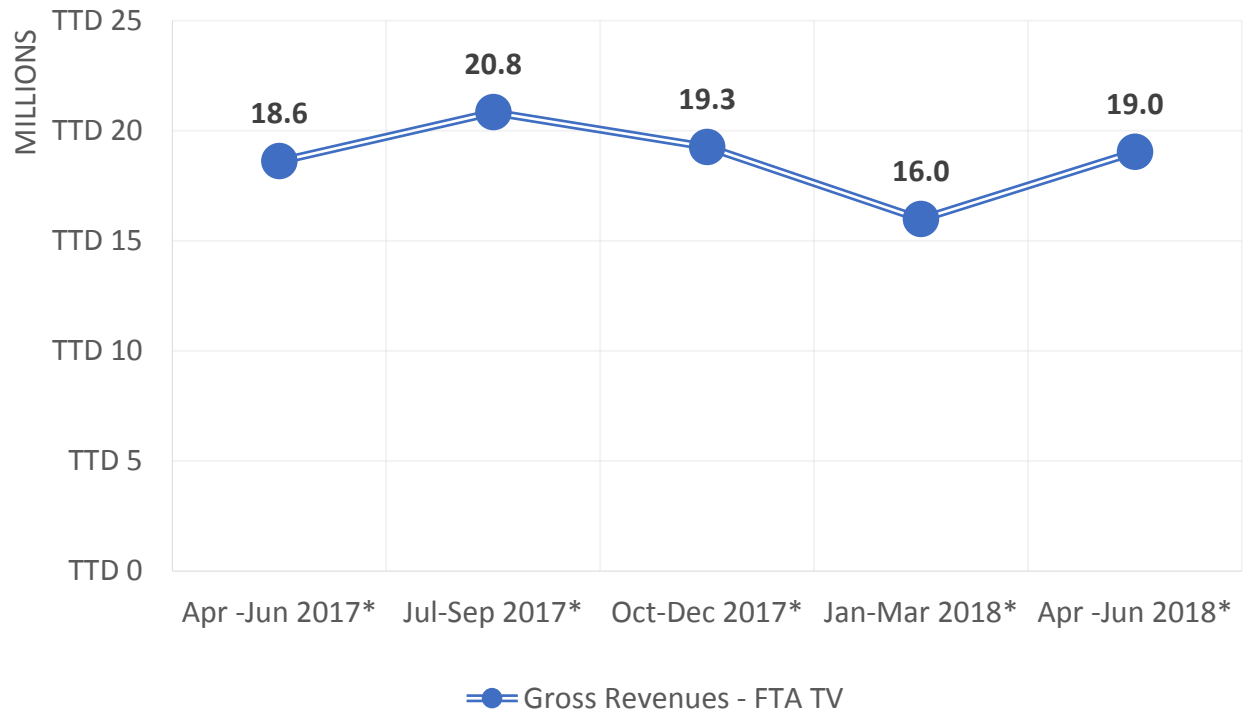


• *Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca Productions Limited, Trinibashment Limited, Radio Toco, and Upward Trend Entertainment Limited*

Free-to-Air TV Revenues

\$ GROSS REVENUES
\$19.0m

Gross revenues from free-to-air TV services
Q2 2017 to Q2 2018



Y-o-Y
PERCENT CHANGE
2.2%

Q-o-Q
PERCENT CHANGE
18.8%

• **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

4,133



Y-o-Y
PERCENT CHANGE

15.6%



Q-o-Q
PERCENT CHANGE

8.1%

HHI for Free-to-Air TV Services -
Q2 2016 to Q2 2017



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



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