



QUARTERLY MARKET UPDATE

July to September 2018

Quarterly Market Update – Q3 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

319,000



Y-o-Y PERCENT CHANGE

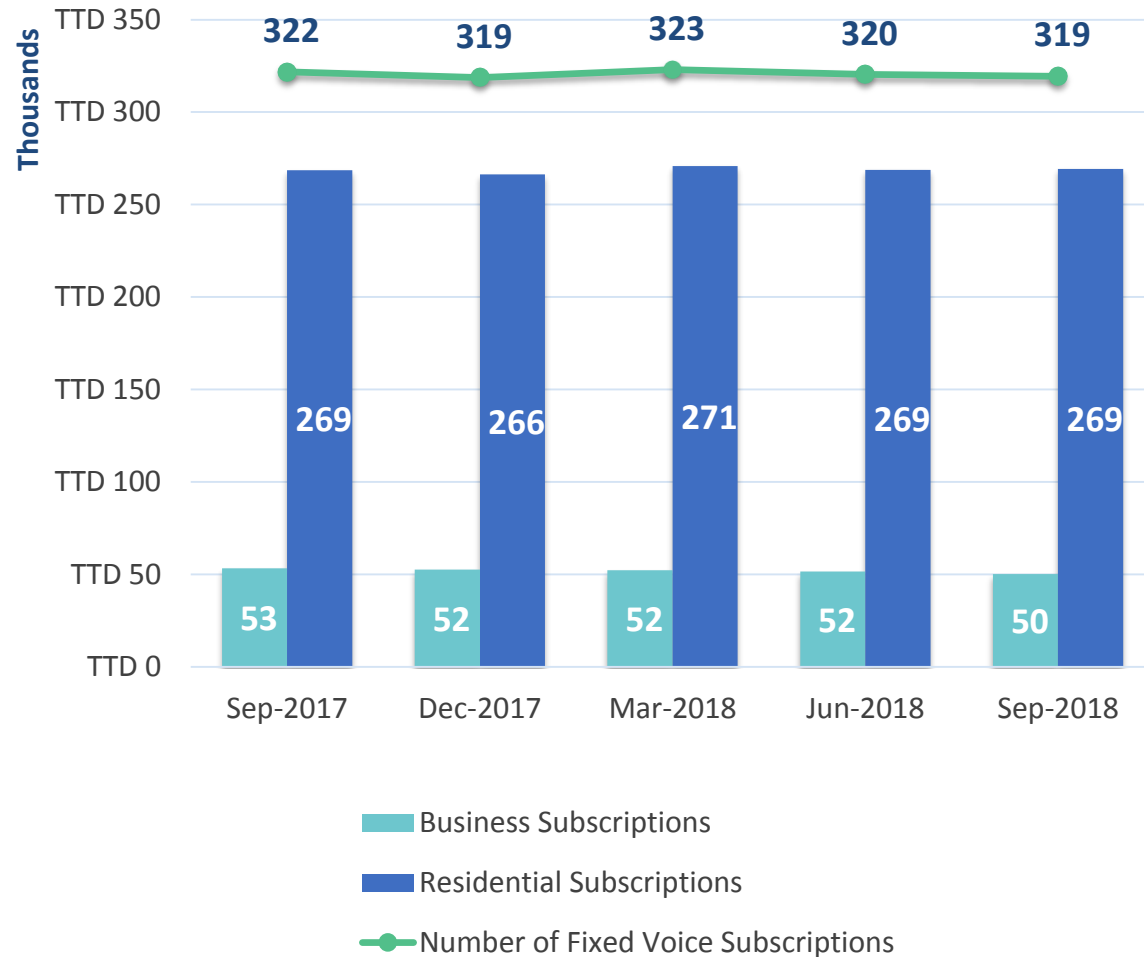
-0.9%



Q-o-Q PERCENT CHANGE

-0.3%

Number Of Fixed Line Subscriptions Q3 2017 To Q3 2018



Fixed Voice Penetration



FIXED VOICE
PENETRATION PER
100 INHABITANTS

23.6



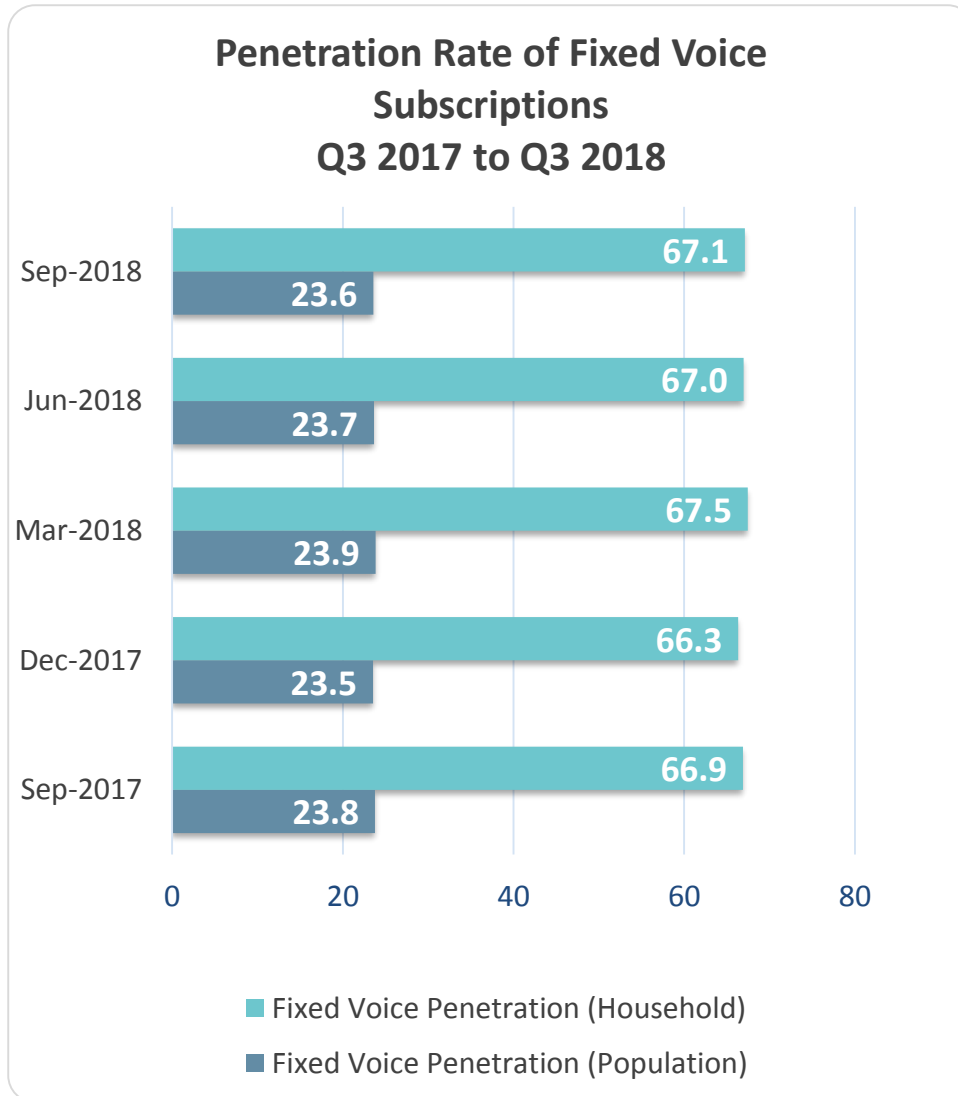
Y-o-Y
PERCENT CHANGE

-0.3%



Q-o-Q
PERCENT CHANGE

-0.4%



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

67.1



Y-o-Y
PERCENT CHANGE

0.3%



Q-o-Q
PERCENT CHANGE

0.1%

Fixed Voice Revenues



GROSS REVENUES

\$142.9m



Y-o-Y
PERCENT CHANGE

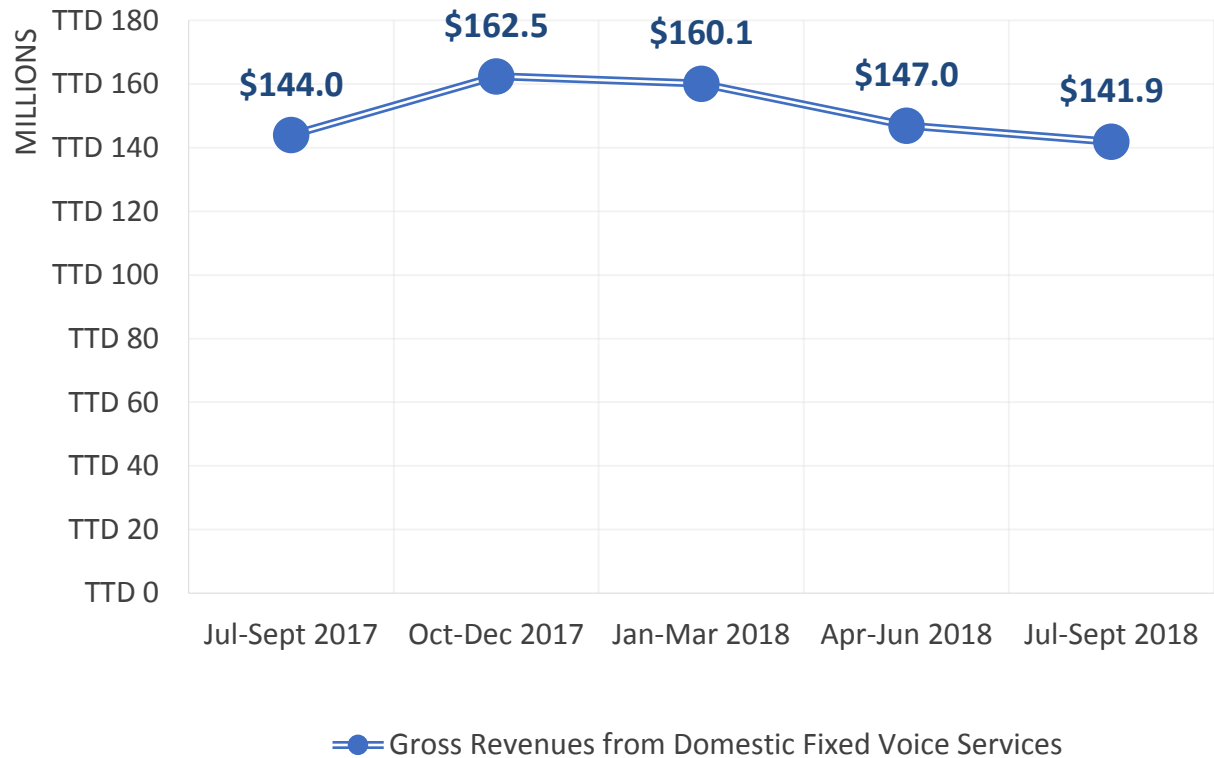
-1.5%



Q-o-Q
PERCENT CHANGE

-3.5%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES
Q3 2017 TO Q3 2018



Fixed Voice HHI



HHI

4,192



Y-o-Y
PERCENT CHANGE

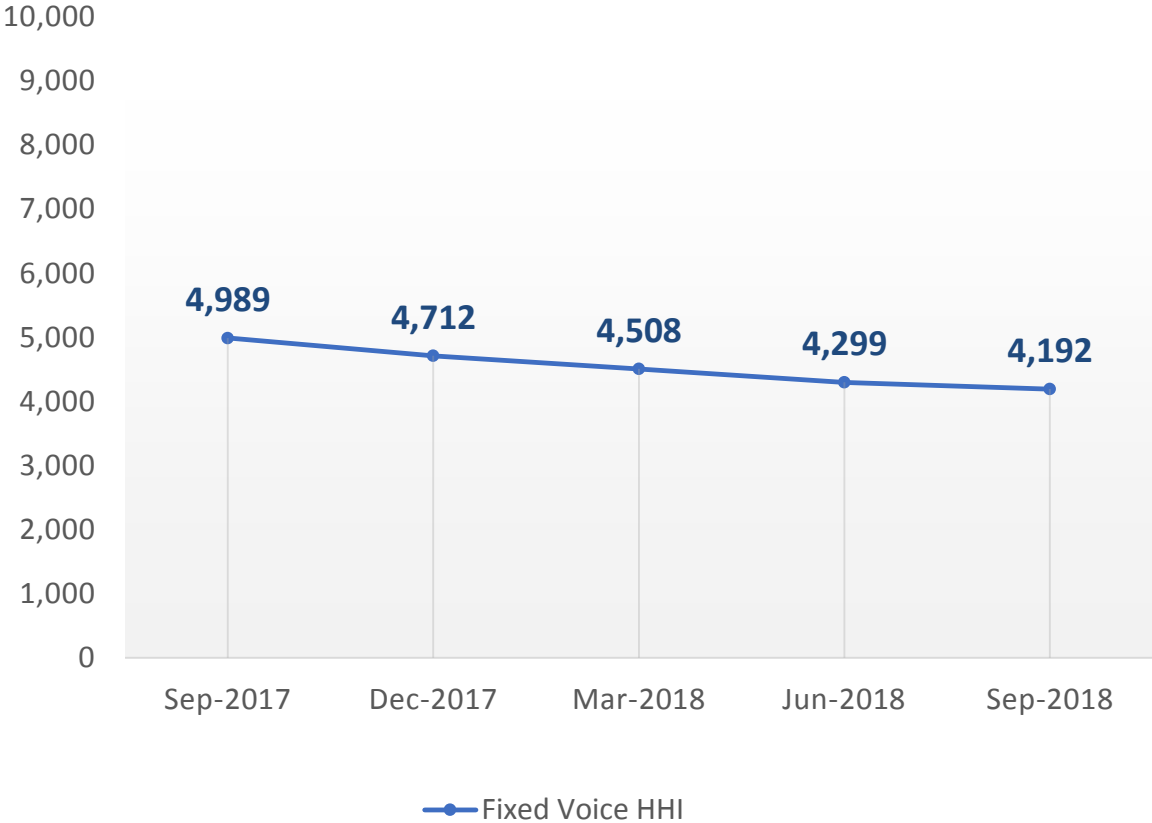
-16.0%



Q-o-Q
PERCENT CHANGE

-2.5%

HHI for Domestic Fixed Line
Q3 2017 to Q3 2018



Fixed Voice Average Revenue Per User

ARPU



\$446

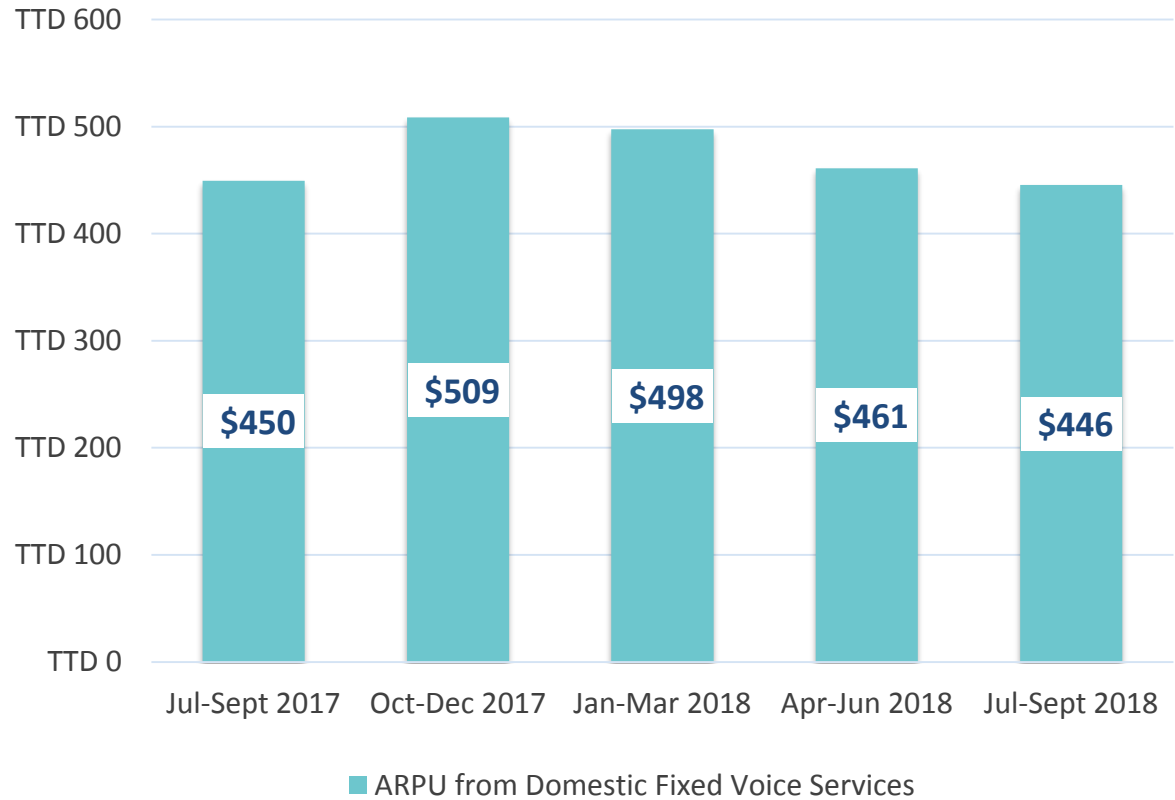
Y-o-Y
PERCENT CHANGE

-0.9%

Q-o-Q
PERCENT CHANGE

-3.3%

ARPU for Domestic Fixed Line
Q3 2017 to Q3 2018



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,956,000



Y-o-Y
PERCENT CHANGE

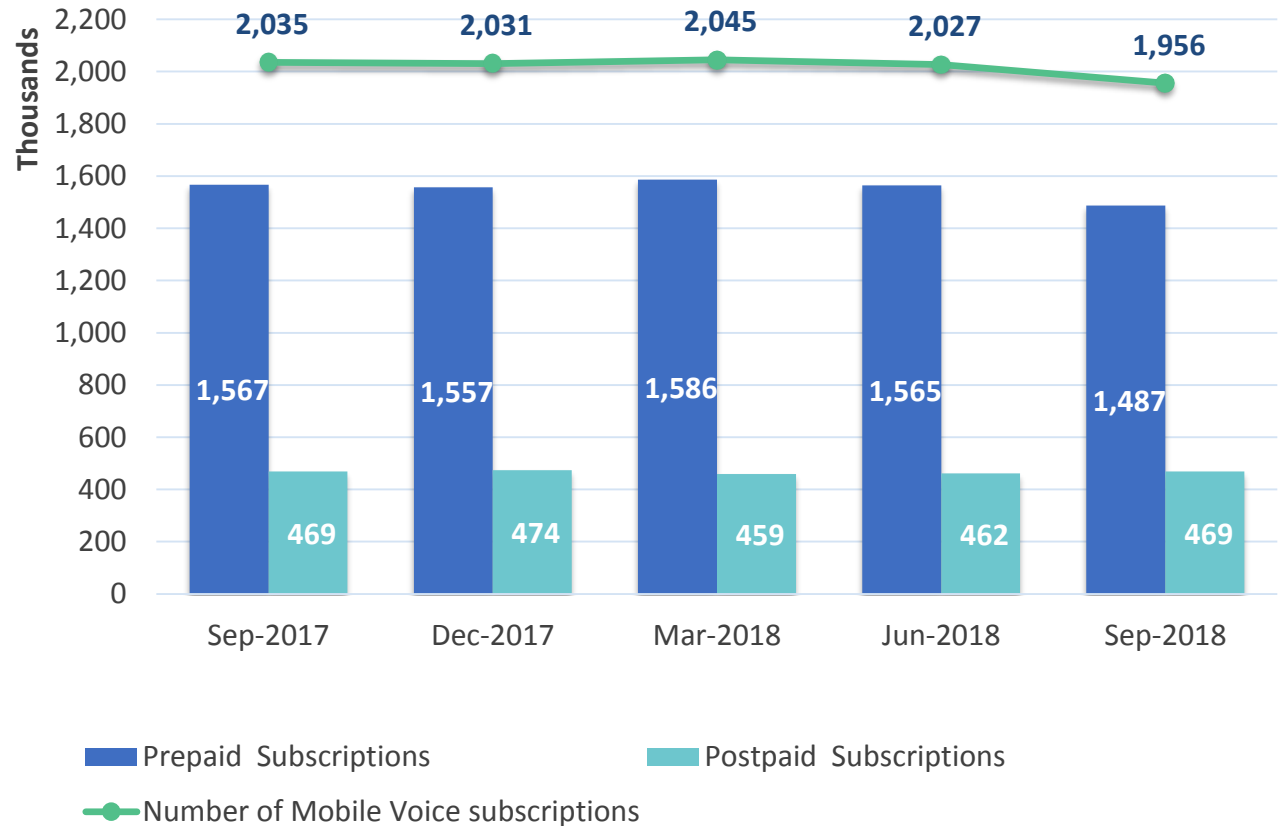
-3.9%



Q-o-Q
PERCENT CHANGE

-3.5%

Number of Mobile Voice Subscriptions Q3 2017 to Q3 2018



Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

144



Y-o-Y
PERCENT CHANGE

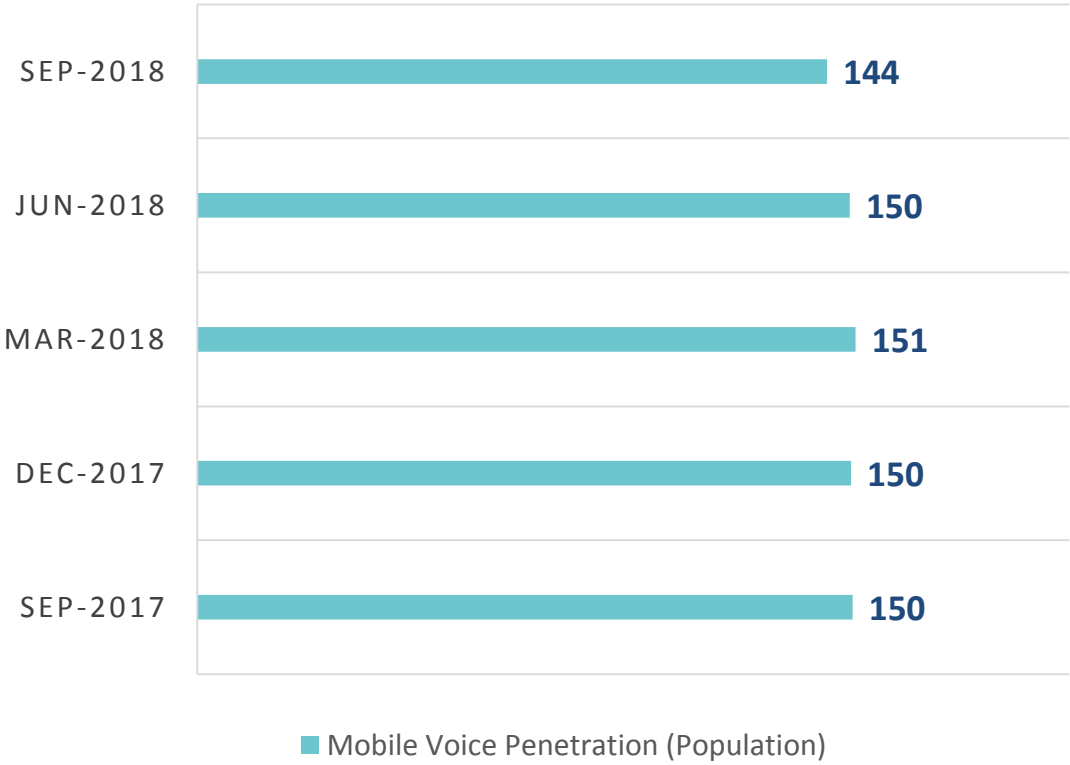
-4.0%



Y-o-Y
PERCENT CHANGE

-4.0%

Penetration Of Mobile Voice Subscriptions
Q3 2017 To Q3 2018



Mobile Services Revenues

\$

GROSS REVENUES

\$489m



Y-o-Y
PERCENT CHANGE

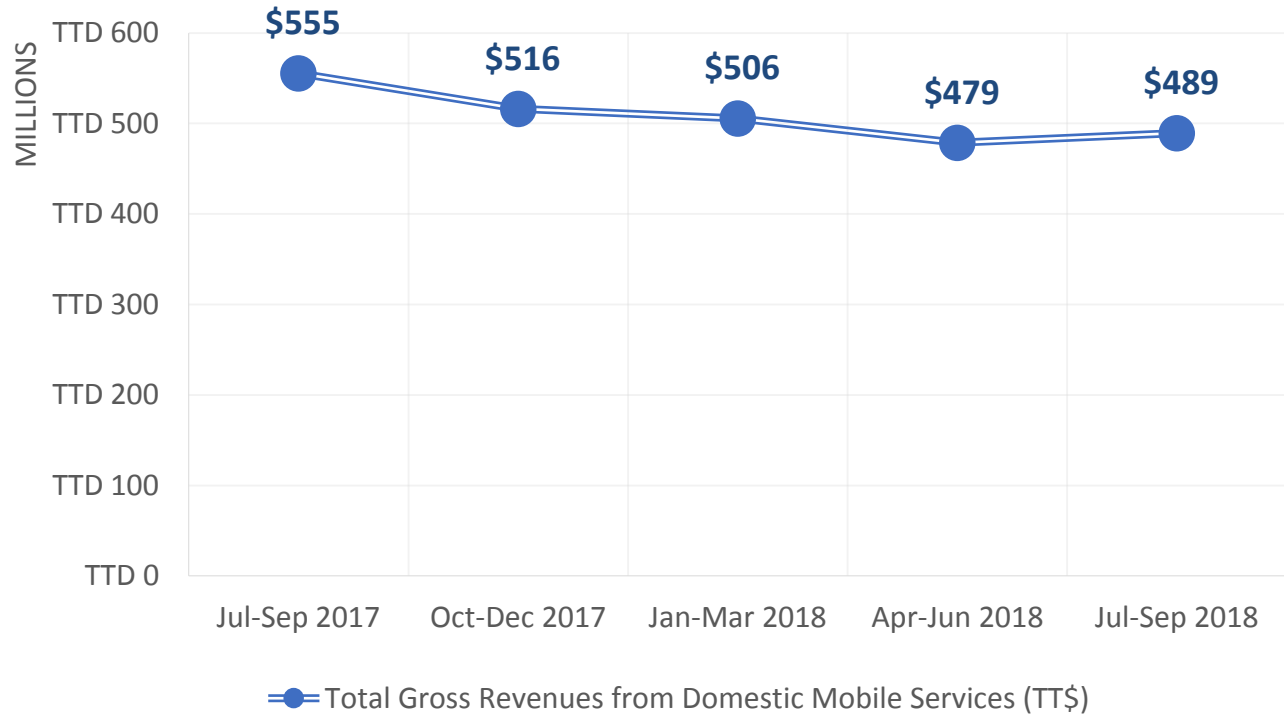
-11.9%



Q-o-Q
PERCENT CHANGE

2.1%

Total Gross Revenues from Domestic Mobile Services (TT\$)
Q3 2017 to Q3 2018



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,018



Y-o-Y
PERCENT CHANGE

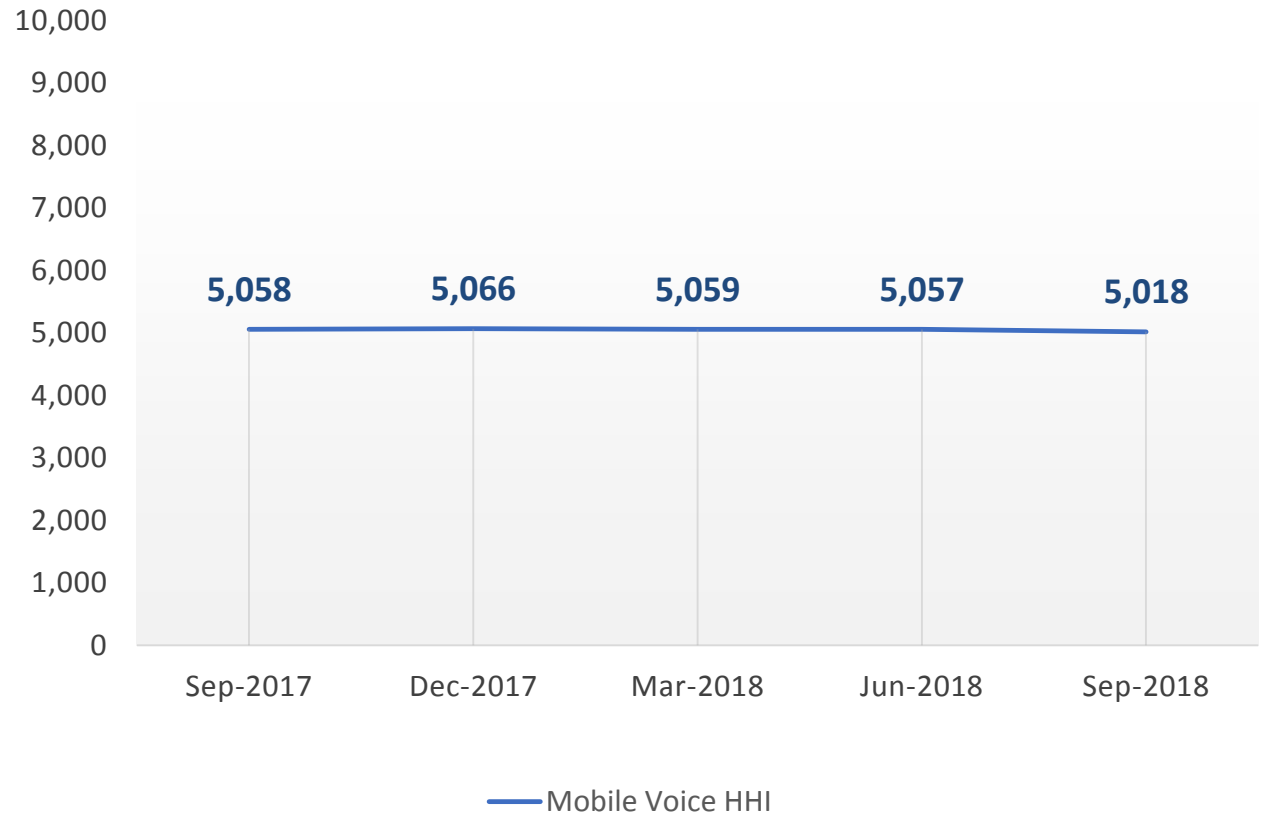
-0.8%



Q-o-Q
PERCENT CHANGE

-0.8%

HHI for Domestic Mobile Services Q3 2017 to Q3 2018



Average Revenue Per User

Mobile Services



ARPU

\$248



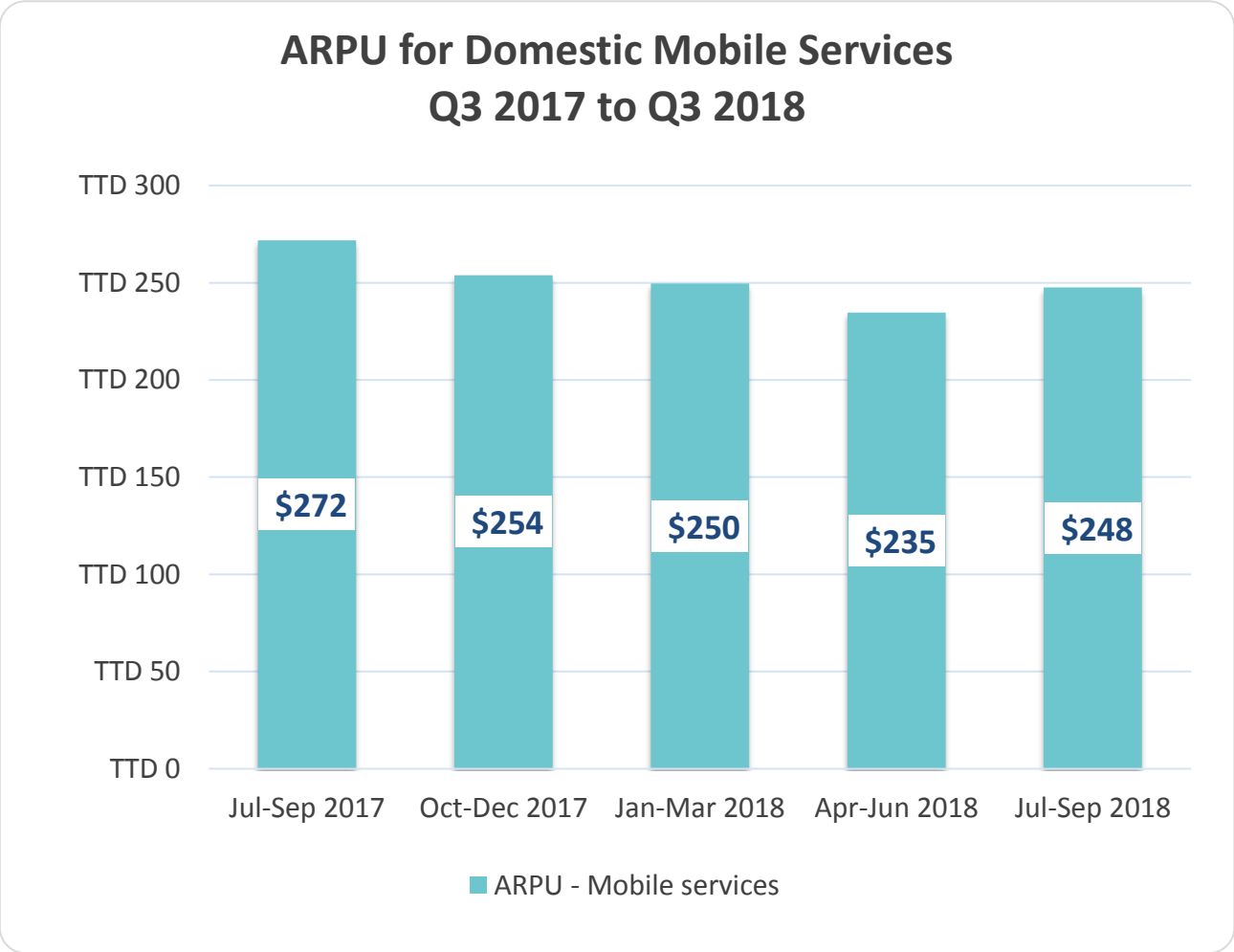
Y-o-Y
PERCENT CHANGE

-8.8%



Q-o-Q
PERCENT CHANGE

5.5%



Fixed Broadband Subscriptions

TOTAL NUMBER OF
SUBSCRIPTIONS

337,000

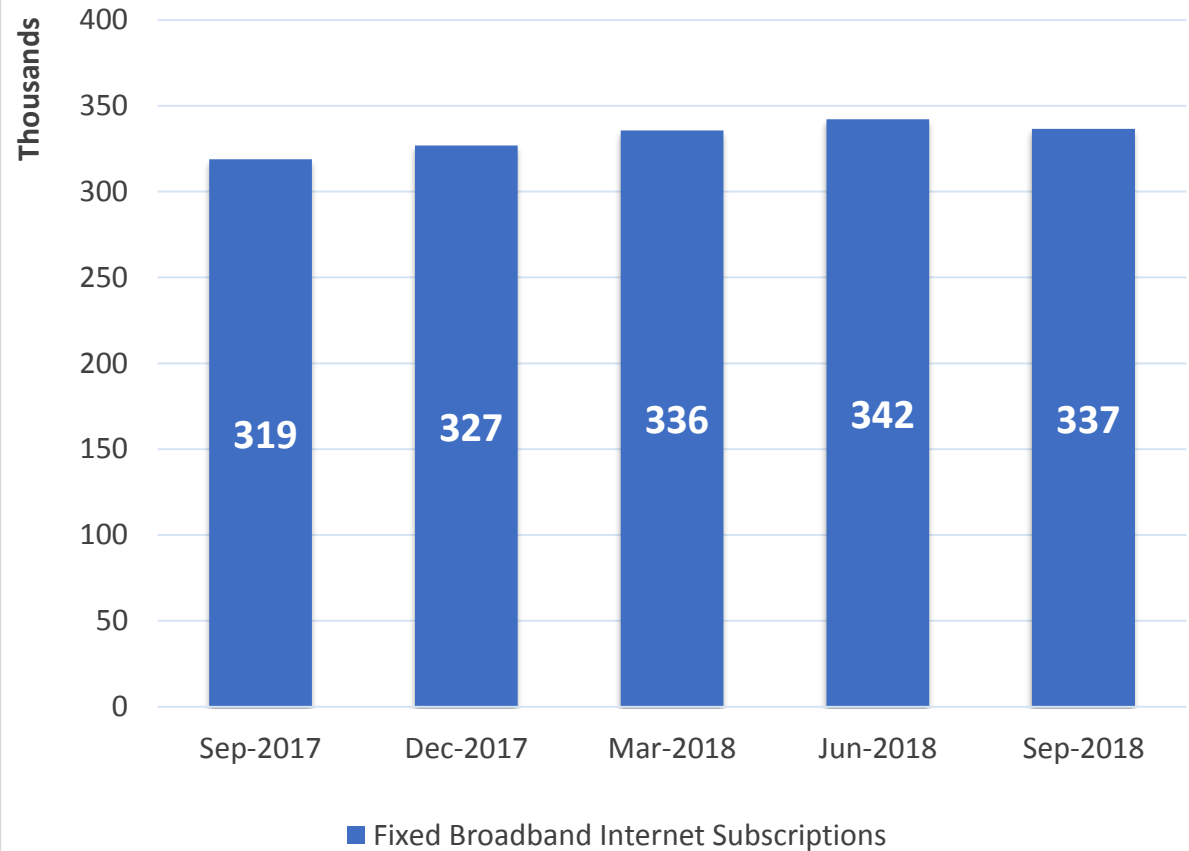
Y-o-Y
PERCENT CHANGE

5.6%

Q-o-Q
PERCENT CHANGE

-1.5%

Number of Fixed Broadband Internet Subscriptions
Q3 2017 to Q3 2018



Fixed Internet Penetration



FIXED INTERNET
PENETRATION PER
100 INHABITANTS

24.9



Y-o-Y
PERCENT CHANGE

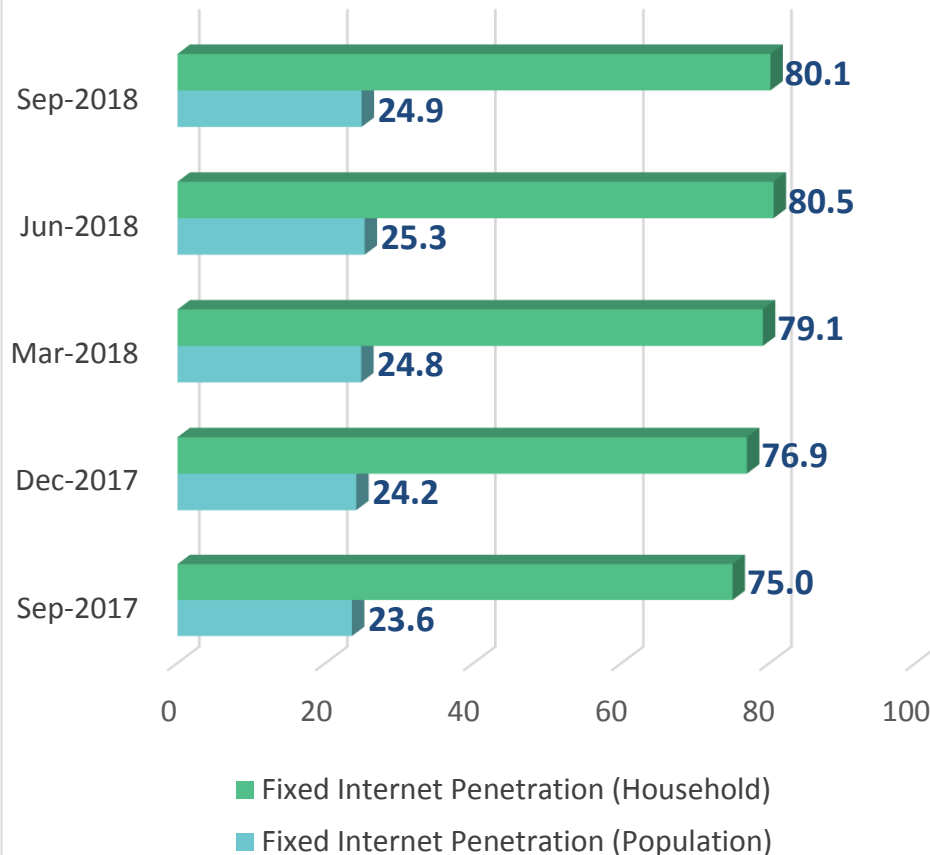
5.5%



Y-o-Y
PERCENT CHANGE

-1.6%

Penetration for Fixed Internet Subscriptions
from Q3 2017 to Q3 2018



FIXED INTERNET
PENETRATION PER
100 HOUSEHOLDS

80.1



Y-O-Y
PERCENT CHANGE

6.8%



Y-O-Y
PERCENT CHANGE

-0.5%

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

47.9

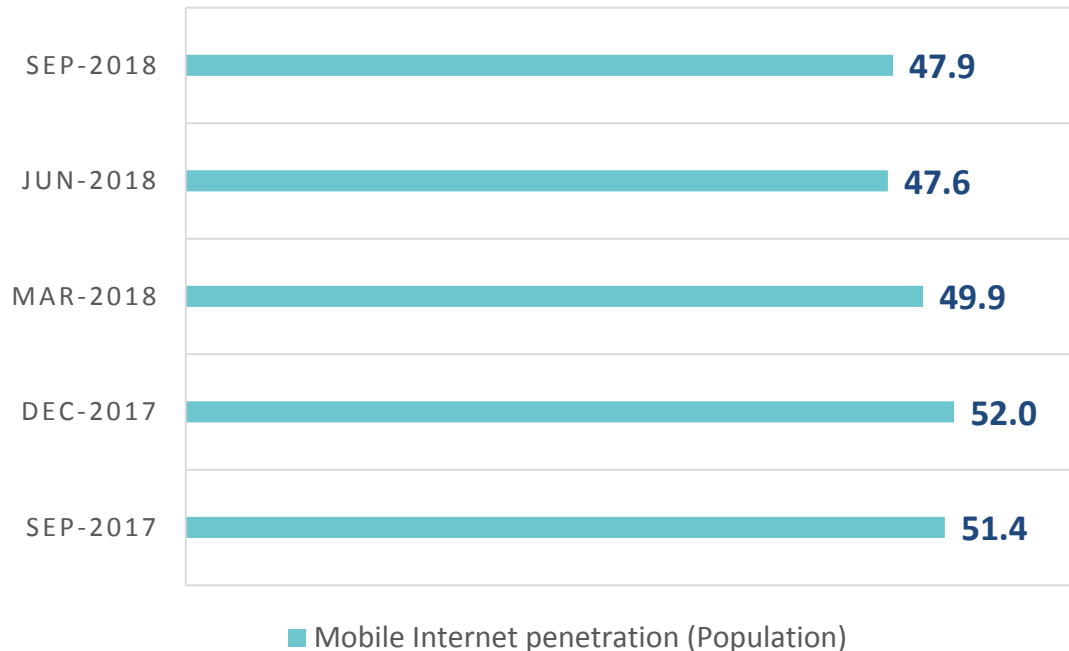
Y-o-Y
PERCENT CHANGE

-6.8%

Y-o-Y
PERCENT CHANGE

0.6%

Penetration for Mobile Internet
Subscriptions
Q3 2017 to Q3 2018



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

Fixed Internet Revenues



GROSS REVENUES

\$295m



Y-o-Y
PERCENT CHANGE

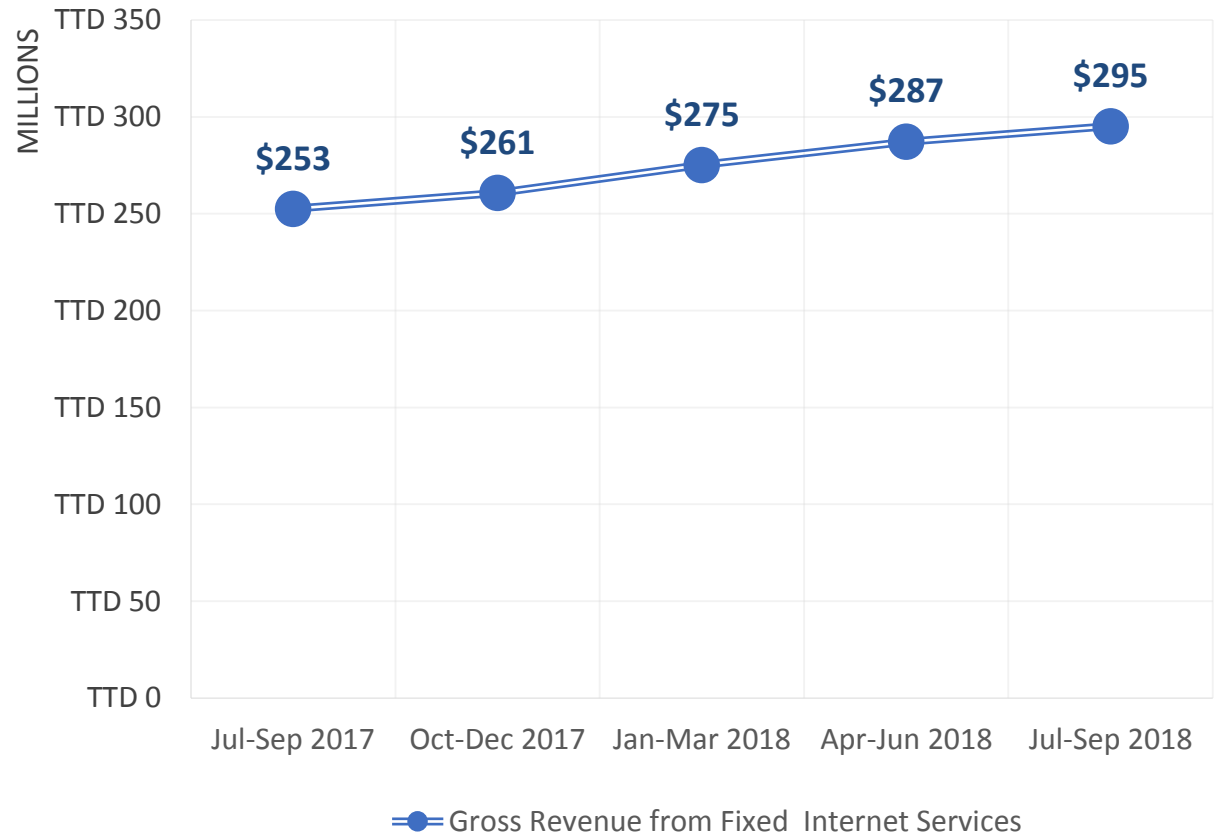
16.6%



Q-o-Q
PERCENT CHANGE

2.8%

Gross Revenues from Fixed Internet Services
Q3 2017 to Q3 2018



Fixed Internet HHI



HHI

3,031



Y-o-Y
PERCENT CHANGE

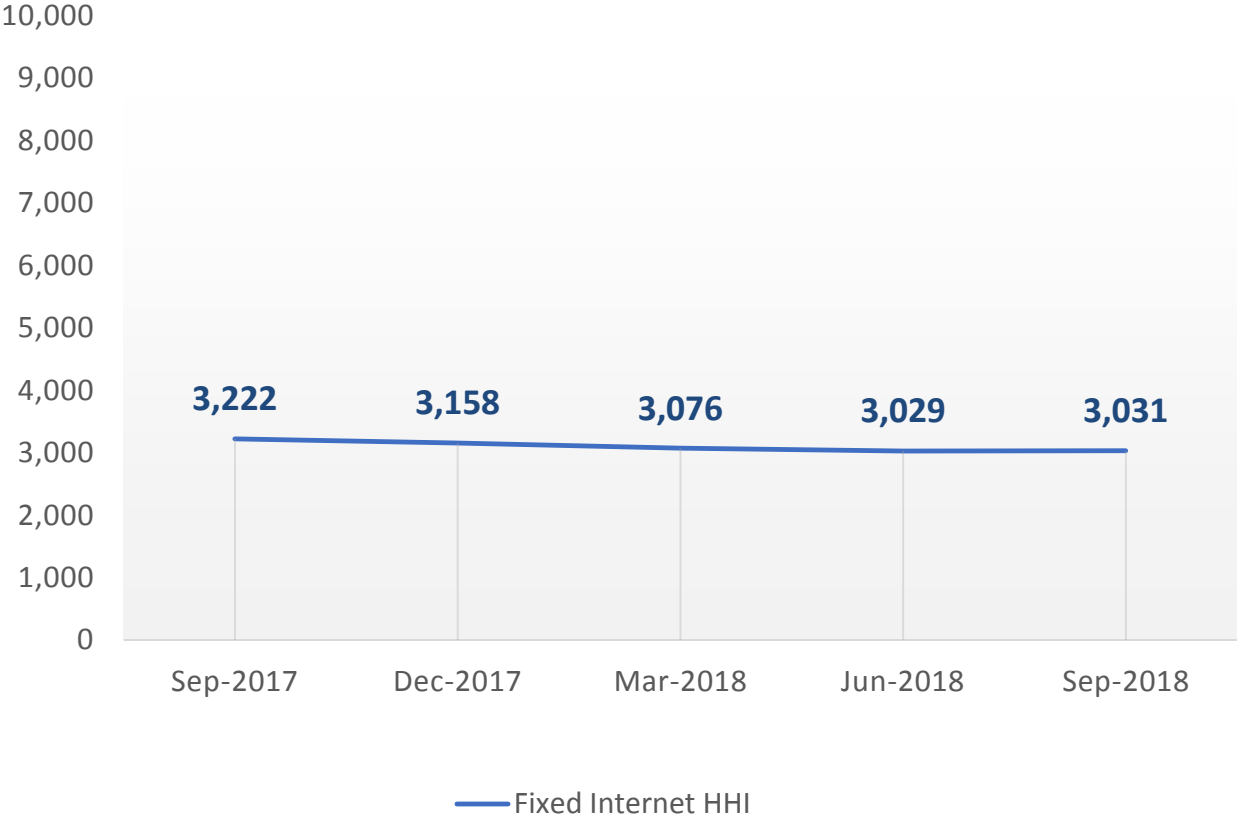
-5.9%



Q-o-Q
PERCENT CHANGE

0.1%

HHI for Fixed Internet Services Q3 2017 to Q3 2018



Fixed Internet Average Revenue Per User

ARPU

\$

\$875

Y-o-Y

PERCENT CHANGE

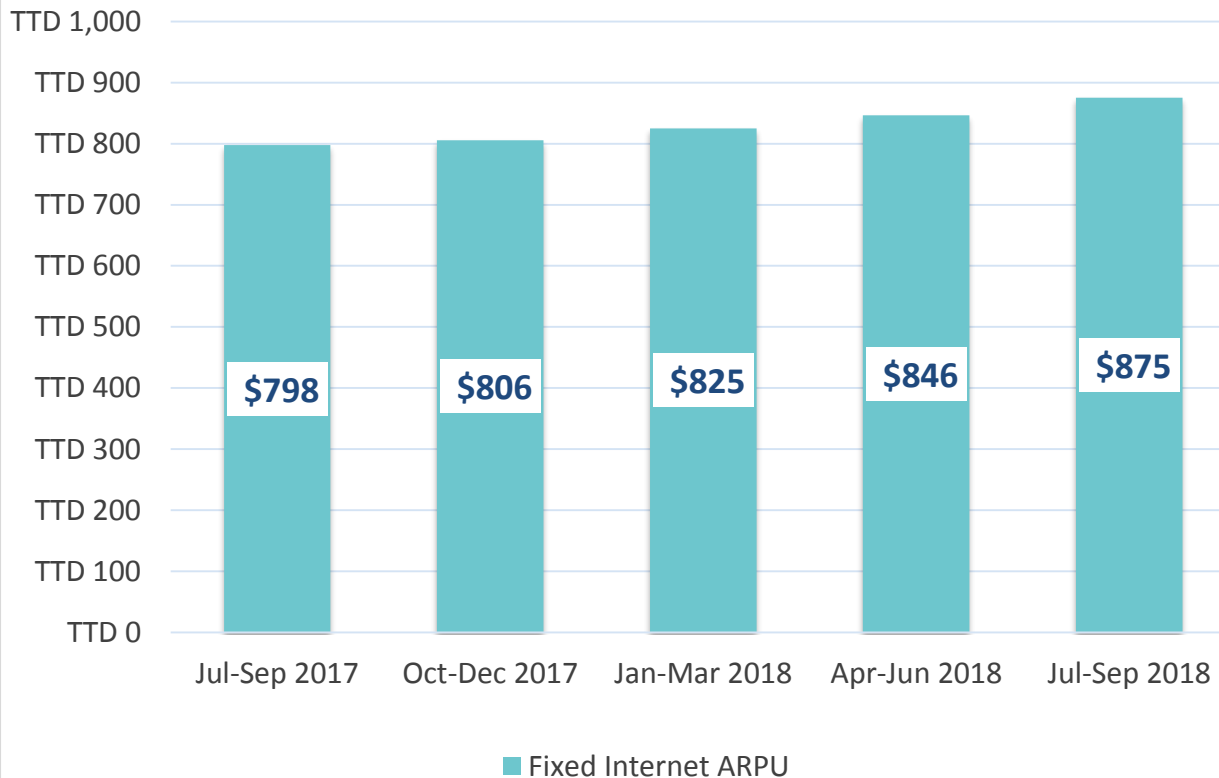
9.6%

Q-o-Q

PERCENT CHANGE

3.4%

ARPU for Fixed Internet Services
Q3 2017 to Q3 2018



Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

241,000



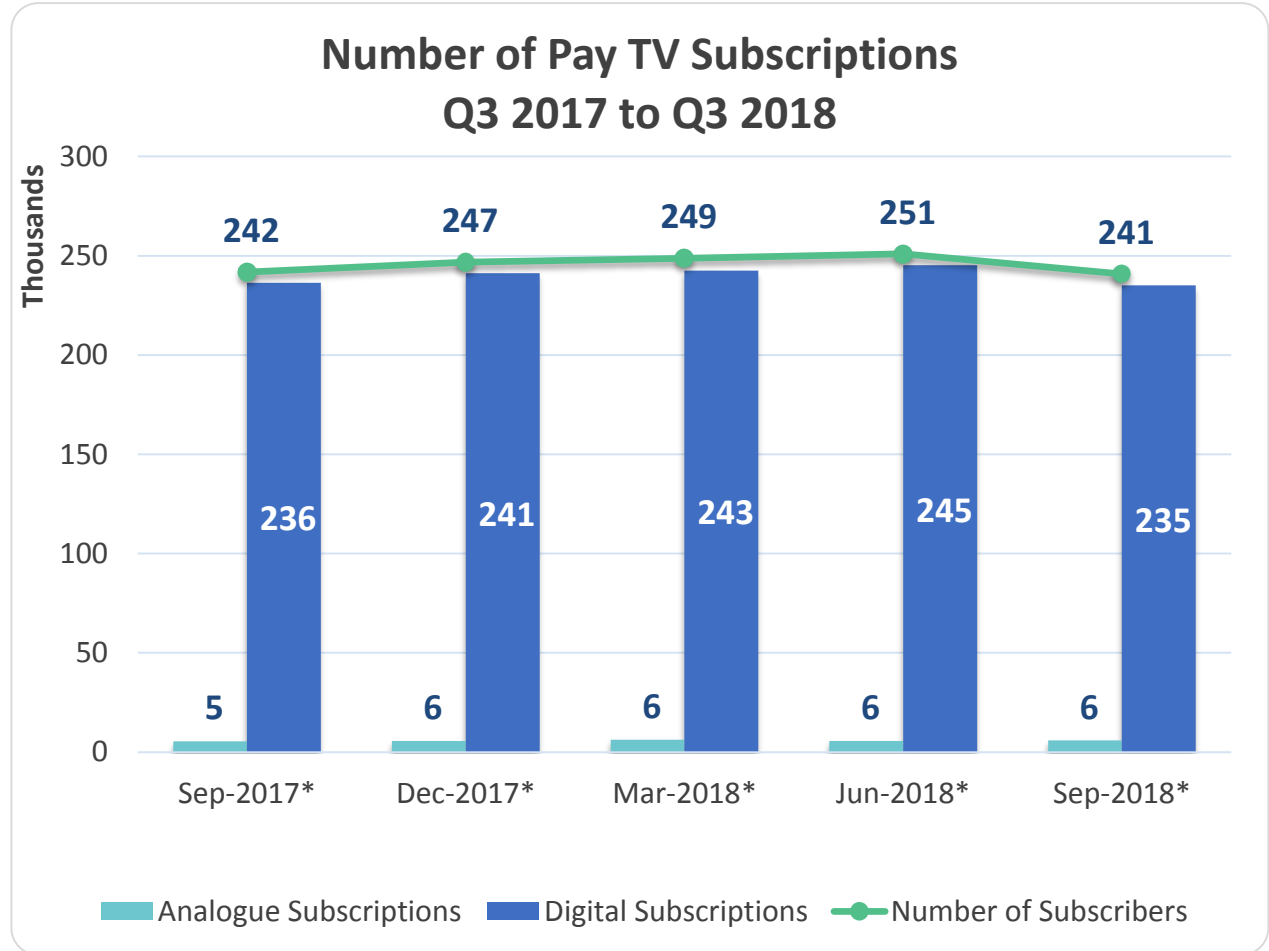
Y-o-Y PERCENT CHANGE

-0.4%



Q-o-Q PERCENT CHANGE

-4.0%



• 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

17.5

Y-o-Y
PERCENT CHANGE

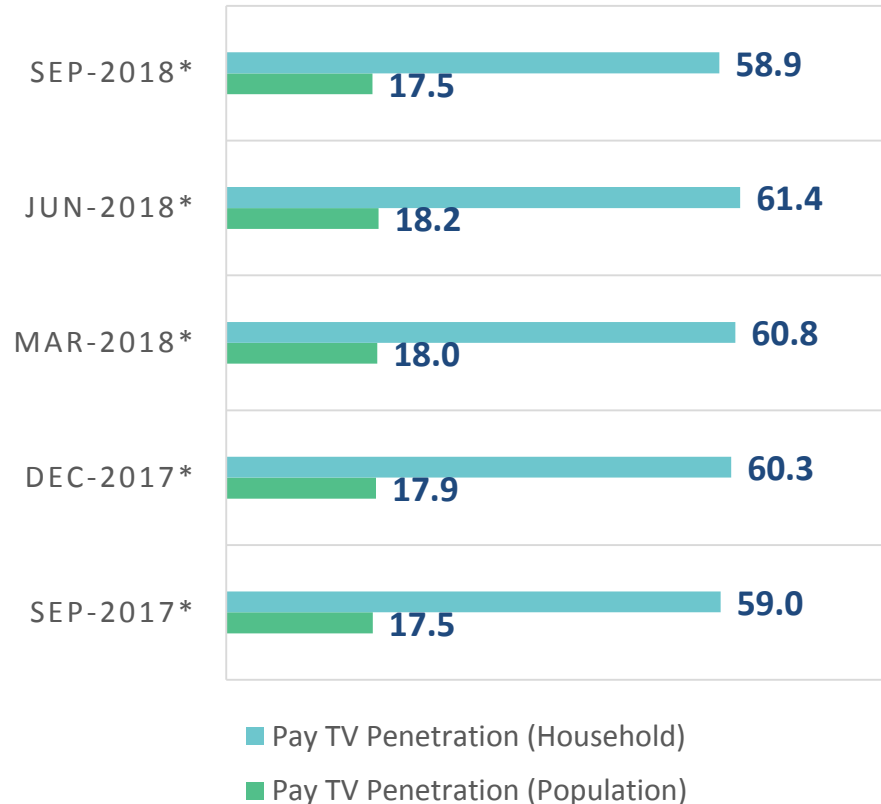
0%



Y-o-Y
PERCENT CHANGE

-3.8%

Penetration for Pay TV Services
Q3 2017 to Q3 2018



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



PAY TV
PENETRATION PER
100 HOUSEHOLDS

58.9



Y-O-Y
PERCENT CHANGE

-0.2%



Y-O-Y
PERCENT CHANGE

-4.1%

Pay TV Revenues



GROSS REVENUES

\$170m



Y-o-Y
PERCENT CHANGE

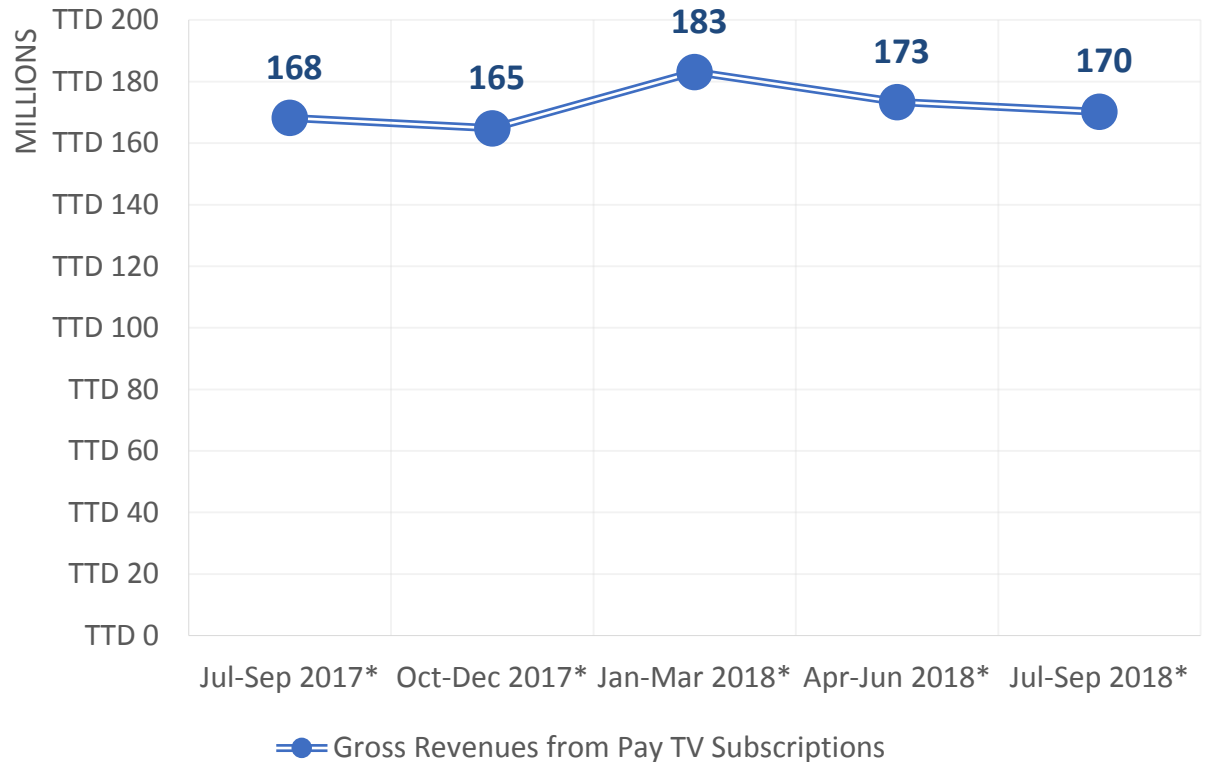
1.2%



Q-o-Q
PERCENT CHANGE

-1.7%

Gross Revenues from Pay TV Services Q3 2017 to Q3 2018



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



HHI

2,834



Y-o-Y
PERCENT CHANGE

-5.9%



Q-o-Q
PERCENT CHANGE

-6.5%

Pay TV HHI

HHI for Pay TV Services Q3 2017 to Q3 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

\$
\$692

Y-o-Y

PERCENT CHANGE

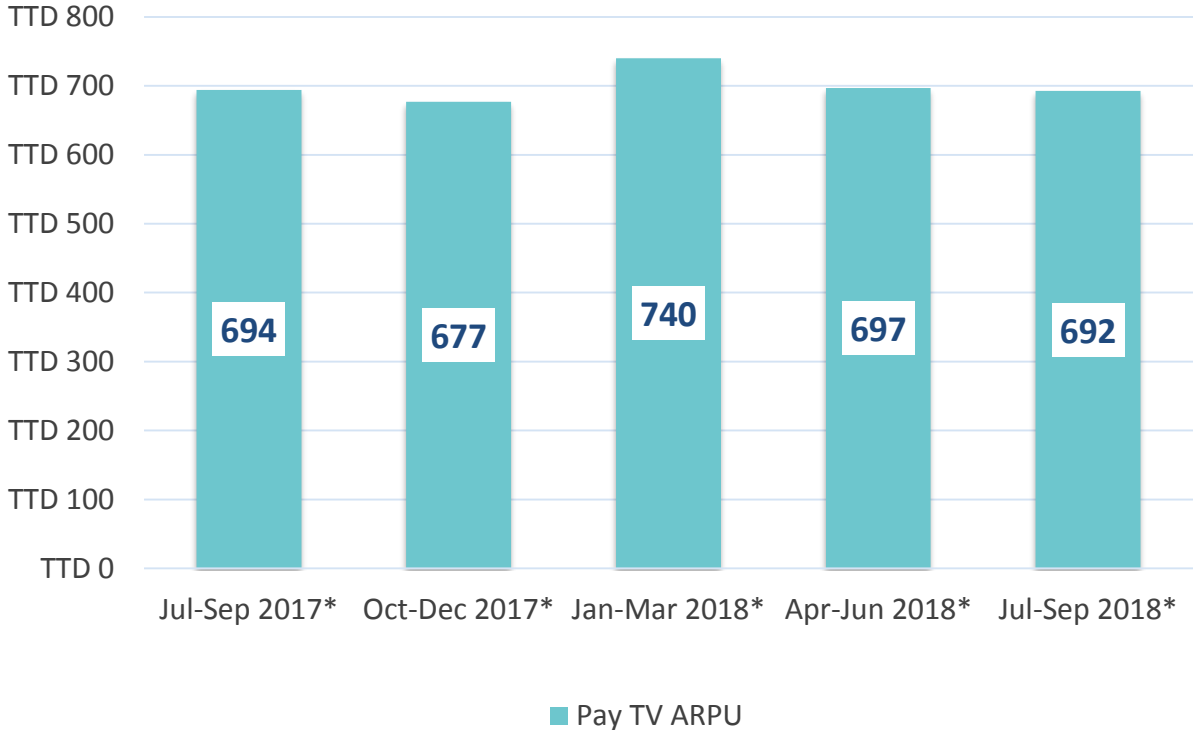
-0.3%

Q-o-Q

PERCENT CHANGE

-0.7%

ARPU for Pay TV
Q3 2017 to Q3 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

\$30.2m



Y-o-Y
PERCENT CHANGE

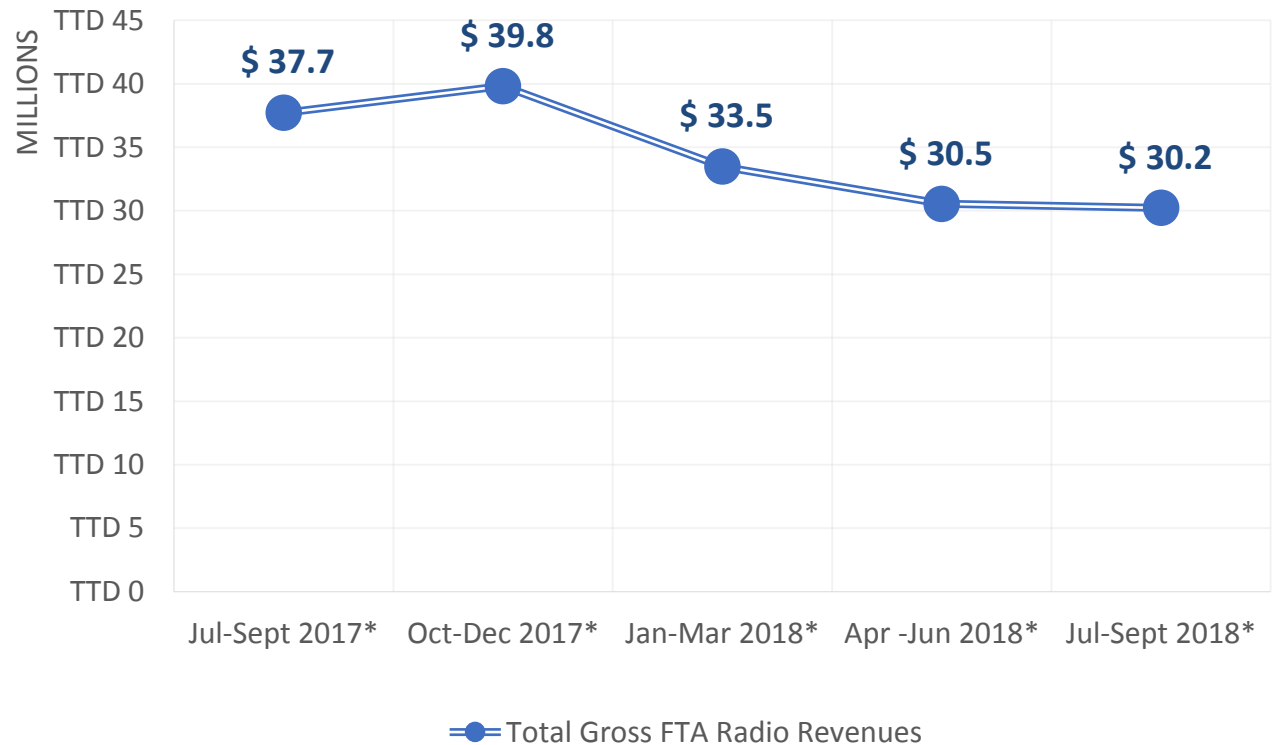
-19.9%



Q-o-Q
PERCENT CHANGE

-1.0%

Gross Revenues from Free-to-Air Radio Services
Q3 2017 to Q3 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 Radio HHI



HHI

561



Y-o-Y
PERCENT CHANGE

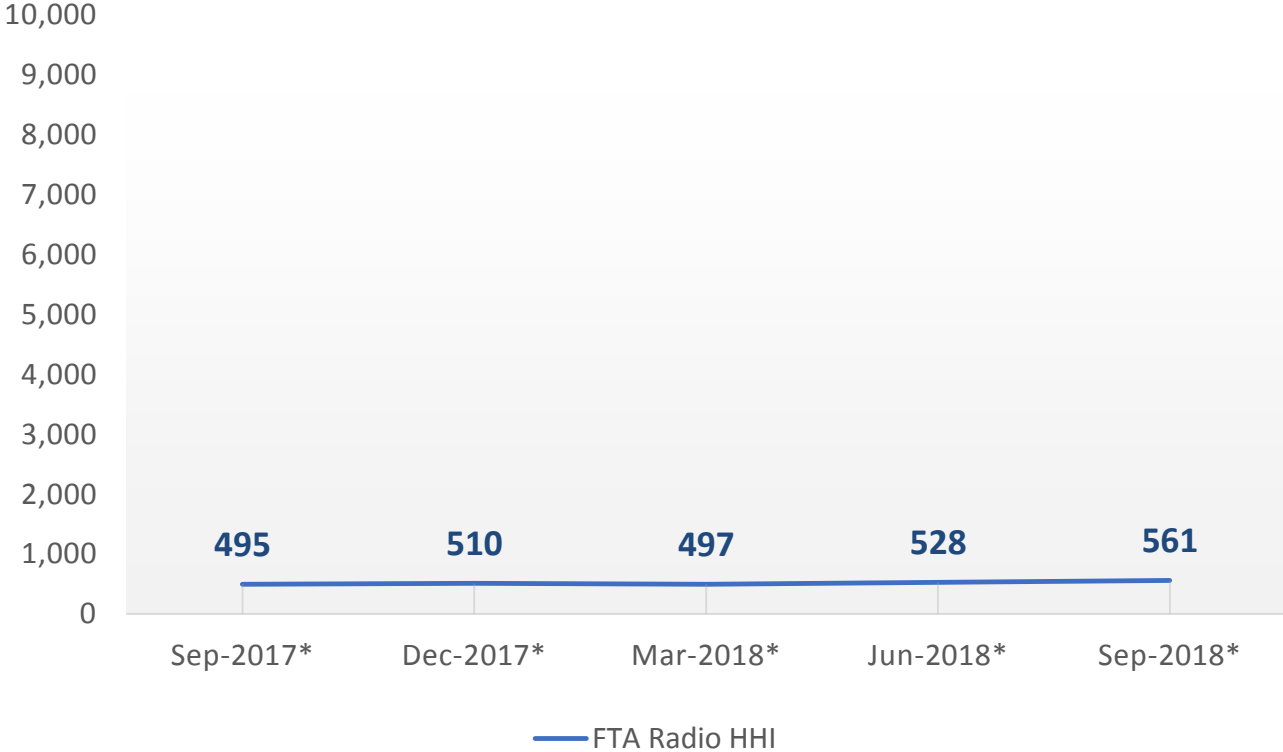
13.3%



Q-o-Q
PERCENT CHANGE

6.3%

HHI for Free-to-Air Radio Services Q3 2017 to Q3 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

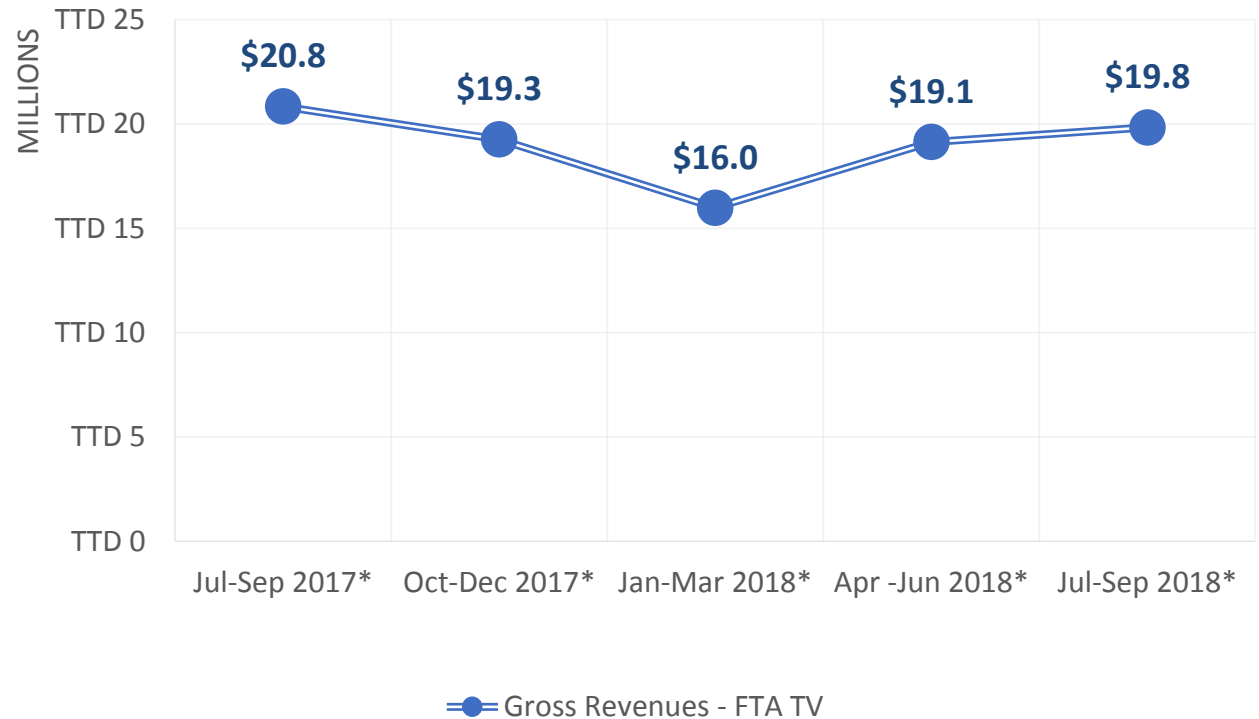
Free-to-Air TV Revenues

\$ GROSS REVENUES
\$19.8m

Y-o-Y
PERCENT CHANGE
-4.8%

Q-o-Q
PERCENT CHANGE
3.7%

Gross Revenues from Free-to-Air TV Services
Q3 2017 To Q3 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

4,258



Y-o-Y
PERCENT CHANGE

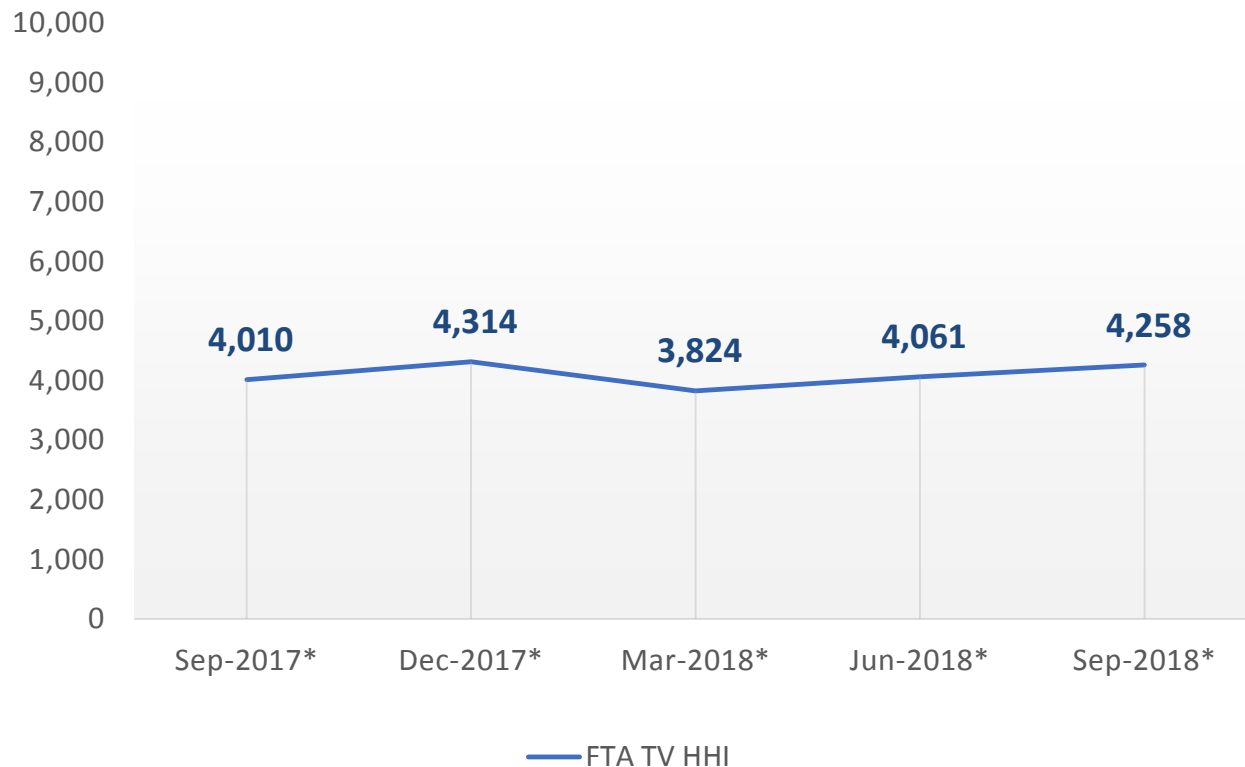
6.2%



Q-o-Q
PERCENT CHANGE

4.9%

HHI for Free to Air TV Services Q3 2017 to Q3 2018



- *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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