



# QUARTERLY MARKET UPDATE

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October to December 2018

## Quarterly Market Update – Q4 2018

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# 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) **1,359,193 (2018 Mid-year population estimate; CSO)**
  
  - b) **Number of households used - 401,382 (Trinidad and Tobago 2011 population and housing census demographic report; CSO)**

# Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

321,000



Y-o-Y PERCENT CHANGE

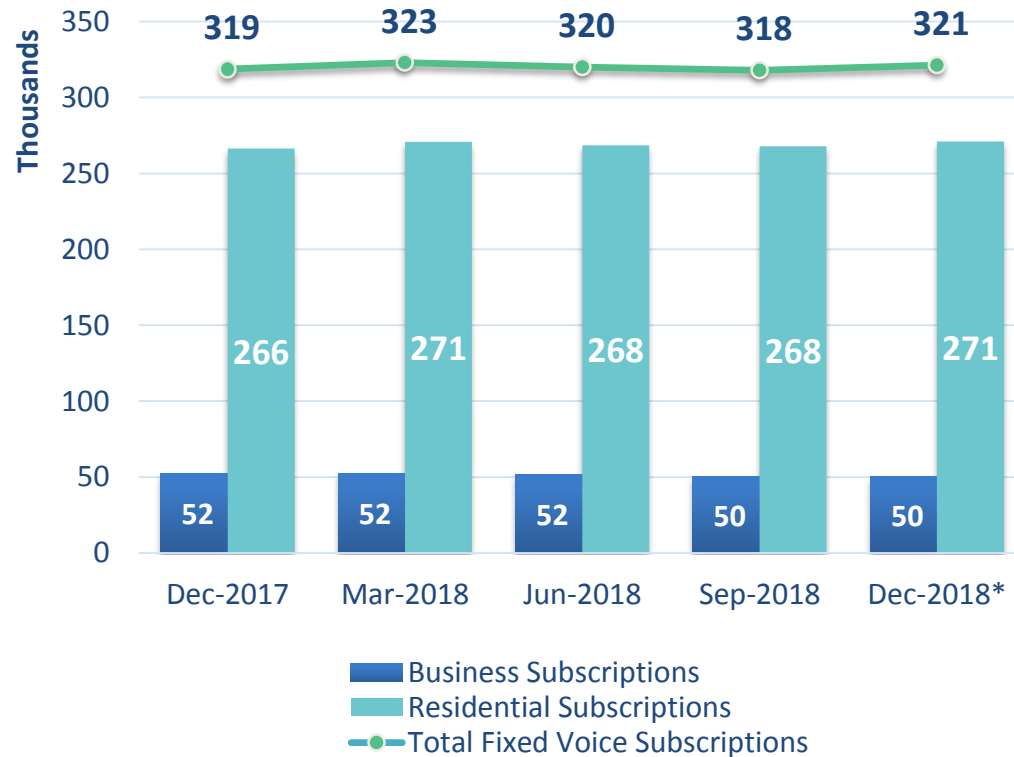
0.6%



Q-o-Q PERCENT CHANGE

0.9%

NUMBER OF FIXED LINE SUBSCRIPTIONS  
Q4 2017 TO Q4 2018



• Data estimated for the following concessionaire who had not submitted data at the date of publication:  
*Telecommunications Services of Trinidad and Tobago*

# Fixed Voice Penetration



FIXED VOICE  
PENETRATION PER  
100 INHABITANTS

23.7



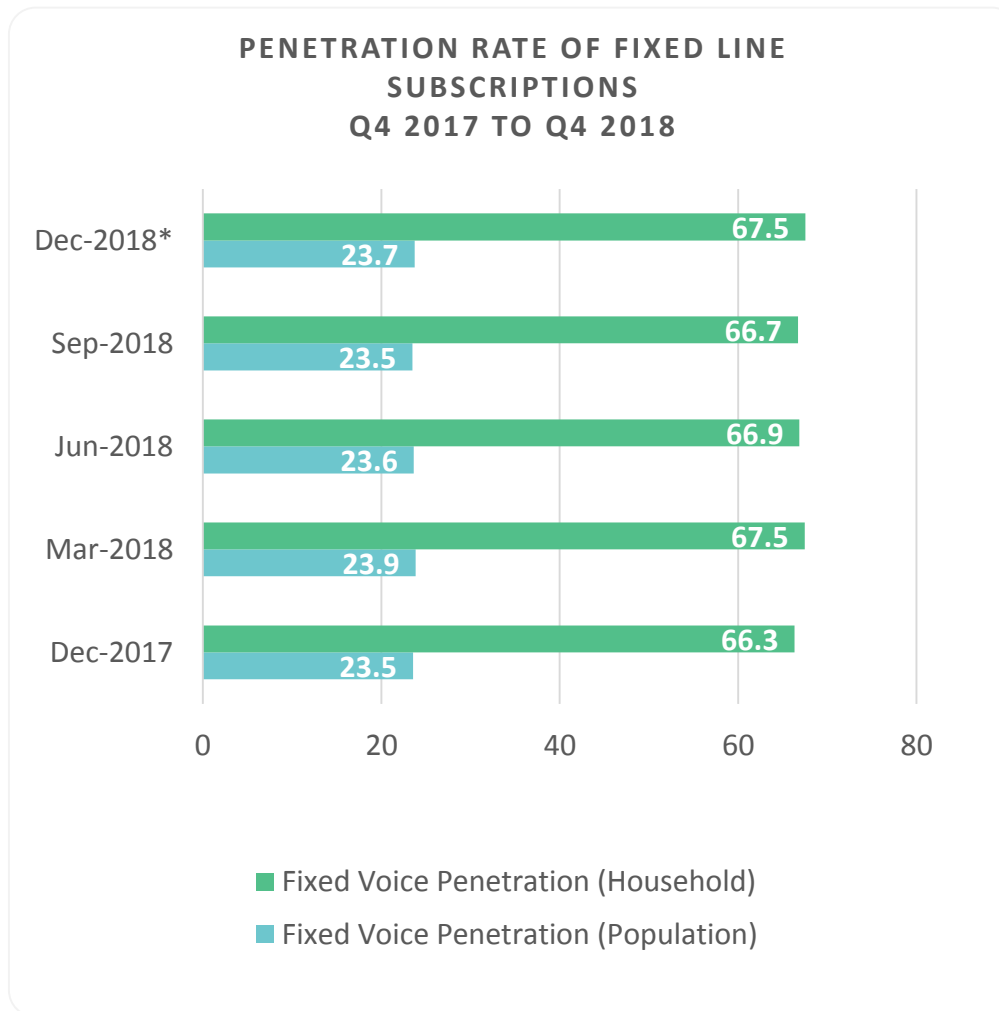
Y-o-Y  
PERCENT CHANGE

0.9%



Q-o-Q  
PERCENT CHANGE

0.9%



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago*



FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS

67.5



Y-o-Y  
PERCENT CHANGE

1.8%



Q-o-Q  
PERCENT CHANGE

1.2%

# Fixed Voice Revenues



GROSS REVENUES

\$141.0m



Y-o-Y  
PERCENT CHANGE

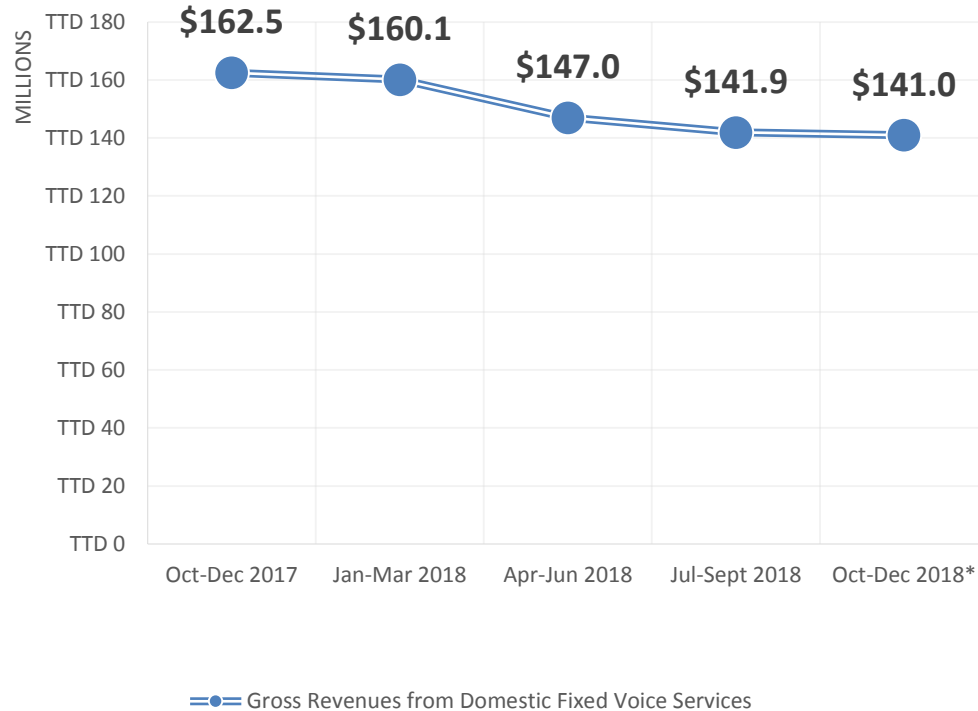
-13.2%



Q-o-Q  
PERCENT CHANGE

-0.6%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES  
Q4 2017 TO Q4 2018



- **Data estimated for the following concessionaire who had not submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago**

# Fixed Voice HHI



HHI

4,169



Y-o-Y  
PERCENT CHANGE

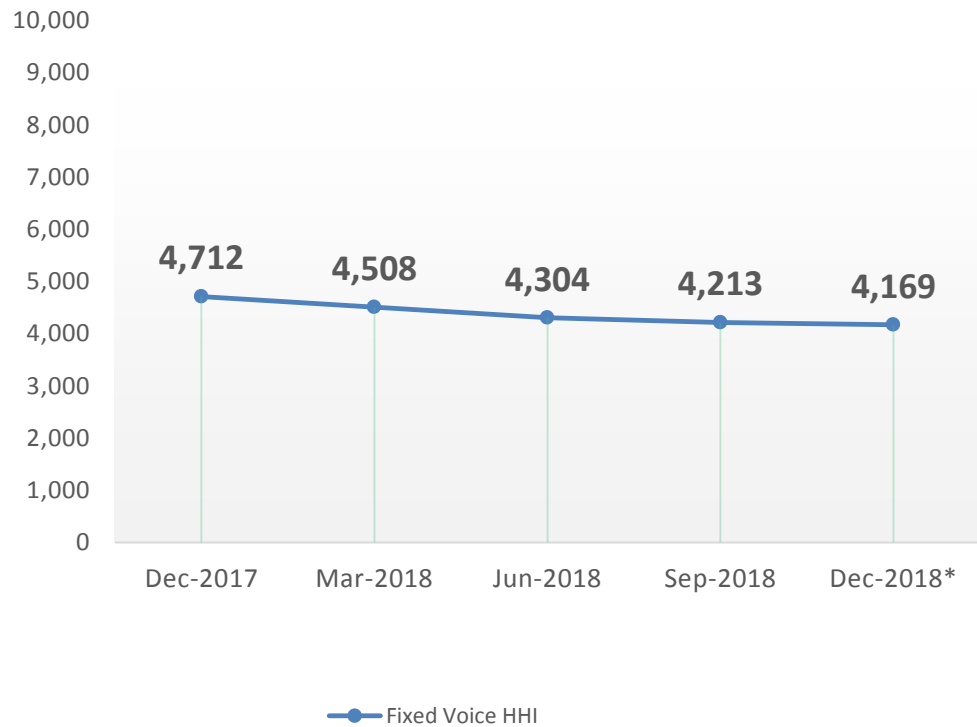
-11.5%



Q-o-Q  
PERCENT CHANGE

-1.0%

HHI FOR DOMESTIC FIXED LINE  
Q4 2017 TO Q4 2018



• *Data estimated for the following concessionaire who had not submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago*



# Fixed Voice Average Revenue Per User

ARPU



\$439

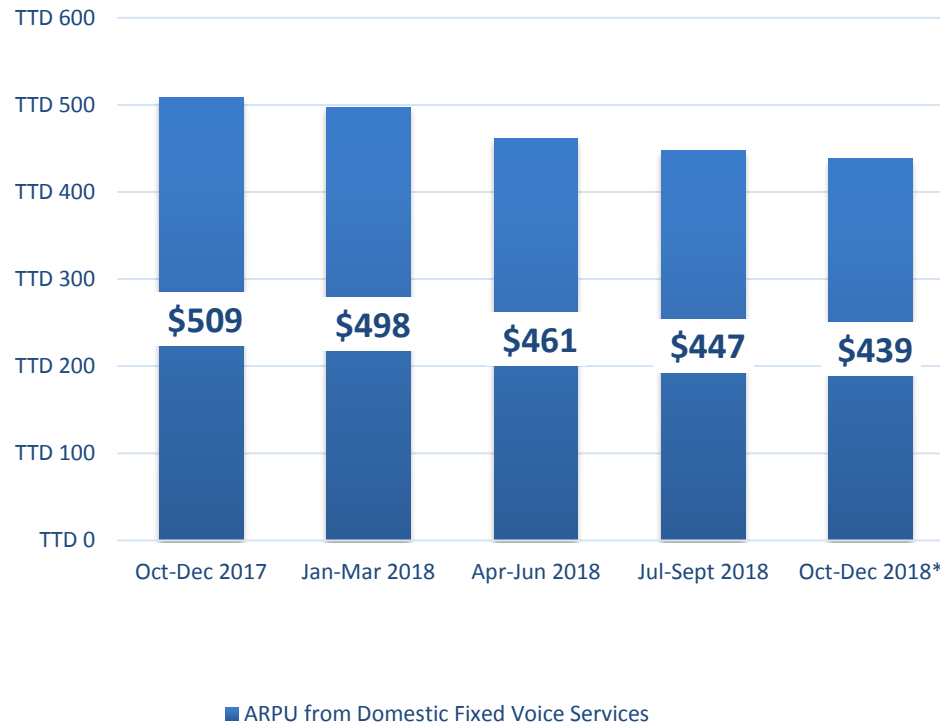
Y-o-Y  
PERCENT CHANGE

-13.8%

Q-o-Q  
PERCENT CHANGE

-1.8%

ARPU FOR DOMESTIC FIXED LINE  
Q4 2017 TO Q4 2018



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago*

# Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,947,000



Y-o-Y PERCENT CHANGE

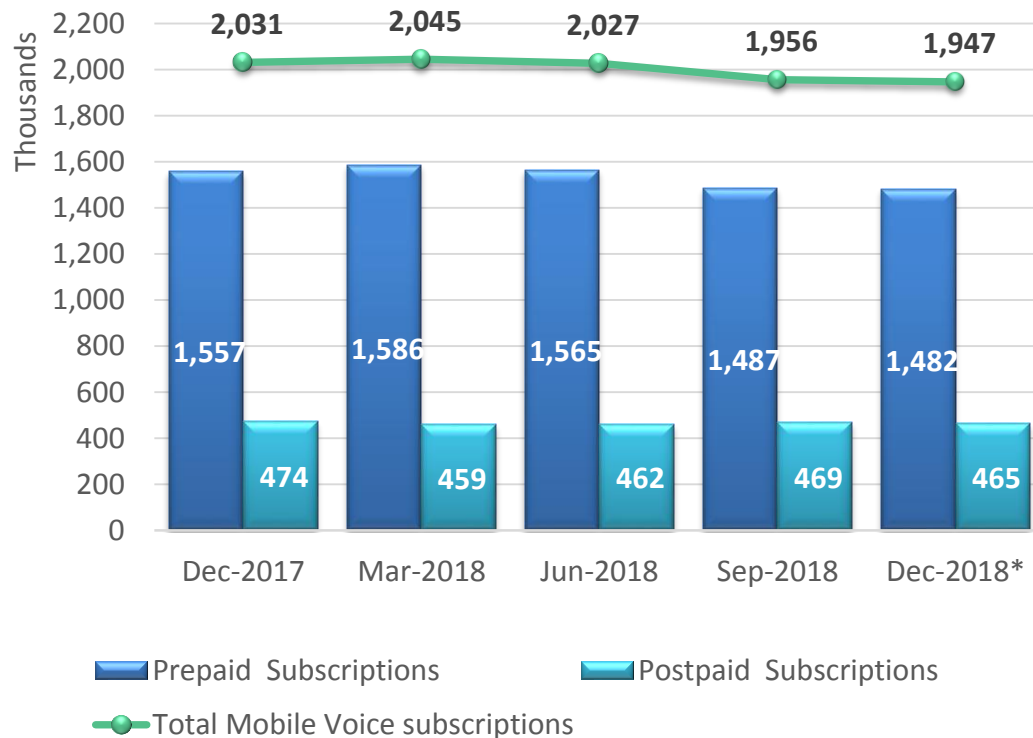
-4.1%



Q-o-Q PERCENT CHANGE

-0.5%

NUMBER OF MOBILE VOICE SUBSCRIPTIONS  
Q4 2017 TO Q4 2018



• Data estimated for the following concessionaire who had not submitted data at the date of publication:  
Digicel (Trinidad and Tobago) Limited

# Mobile Voice Penetration



MOBILE VOICE  
PENETRATION PER  
100 INHABITANTS

143



Y-o-Y  
PERCENT CHANGE

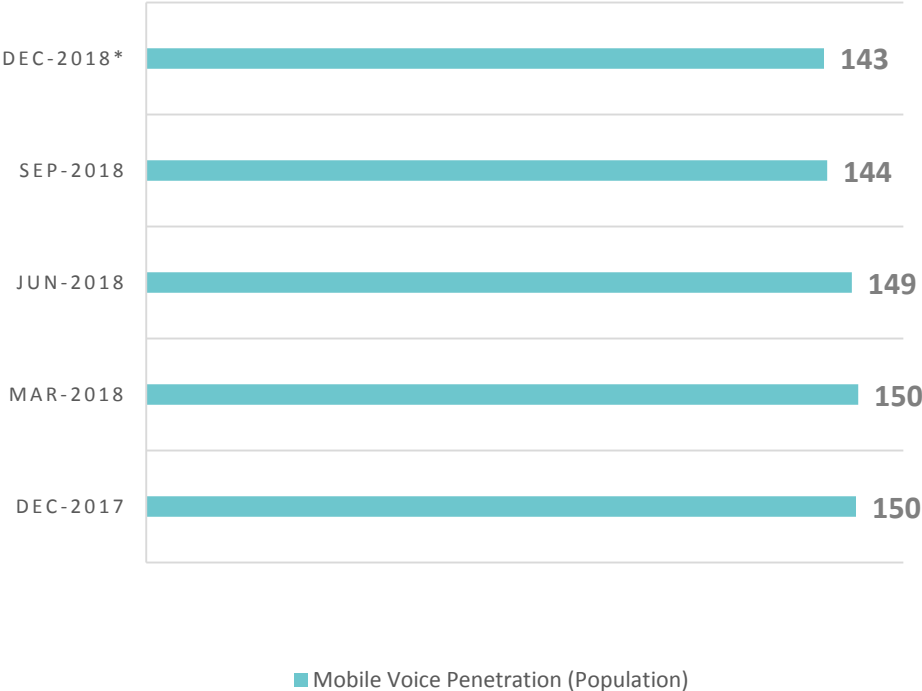
-4.7%



Y-o-Y  
PERCENT CHANGE

-0.7%

PENETRATION OF MOBILE VOICE SUBSCRIPTIONS  
Q4 2017 TO Q4 2018



• Data estimated for the following concessionaire who had not submitted data at the date of publication:  
*Digicel (Trinidad and Tobago) Limited*

# Mobile Services Revenues

\$

GROSS REVENUES

\$491.1m



Y-o-Y  
PERCENT CHANGE

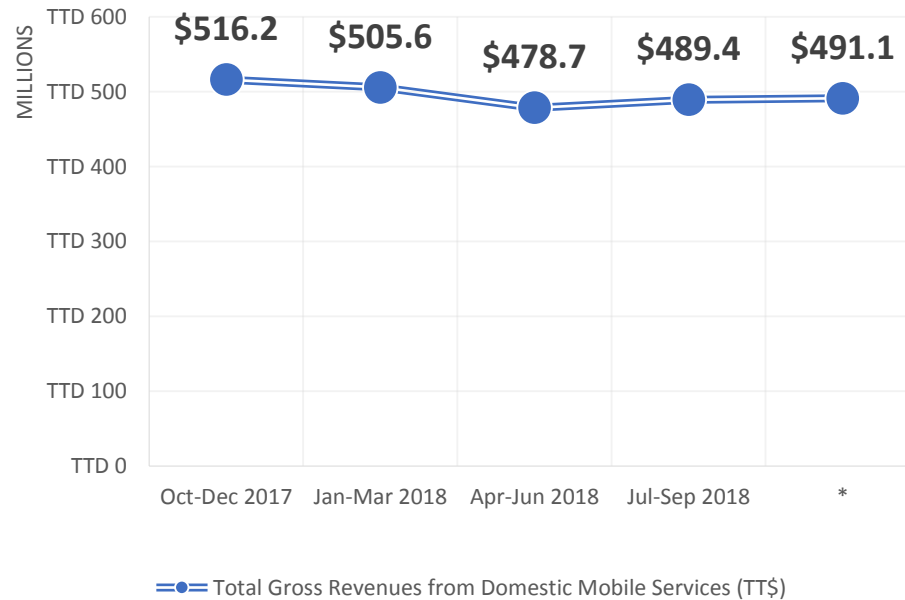
-3.7%



Q-o-Q  
PERCENT CHANGE

1.6%

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES  
Q4 2017 TO Q4 2018



*Includes revenues from Mobile voice and Internet services.*

- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Digicel (Trinidad and Tobago) Limited.*

# Mobile Voice HHI



HHI

5,021



Y-o-Y  
PERCENT CHANGE

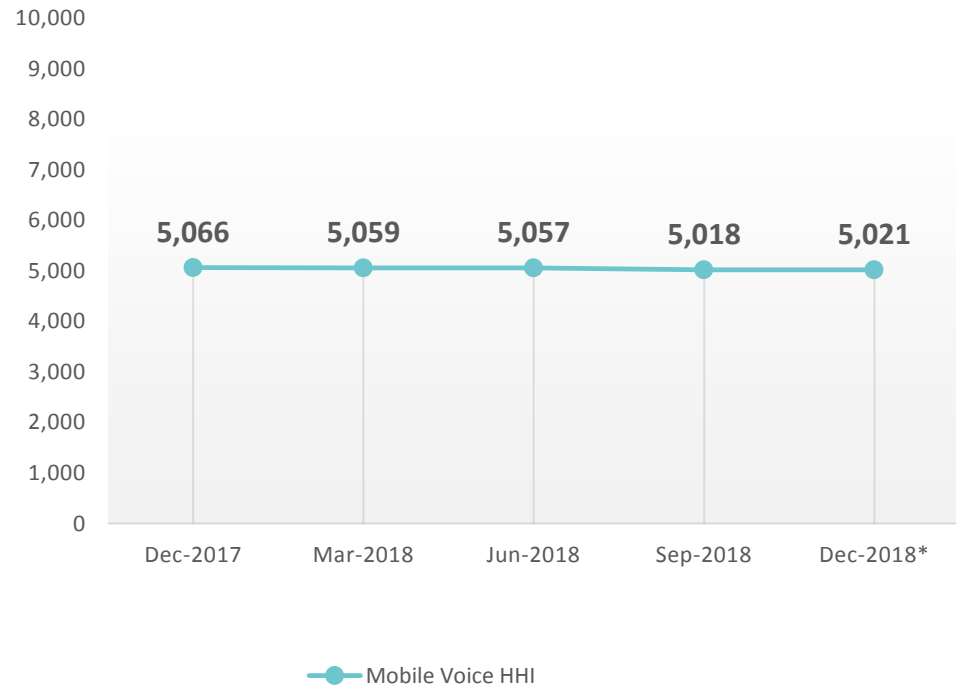
-0.9%



Q-o-Q  
PERCENT CHANGE

0.1%

HHI FOR DOMESTIC MOBILE SERVICES  
Q4 2017 TO Q4 2018



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Digicel (Trinidad and Tobago) Limited*

# Average Revenue Per User Mobile Services



ARPU

\$252



Y-o-Y  
PERCENT CHANGE

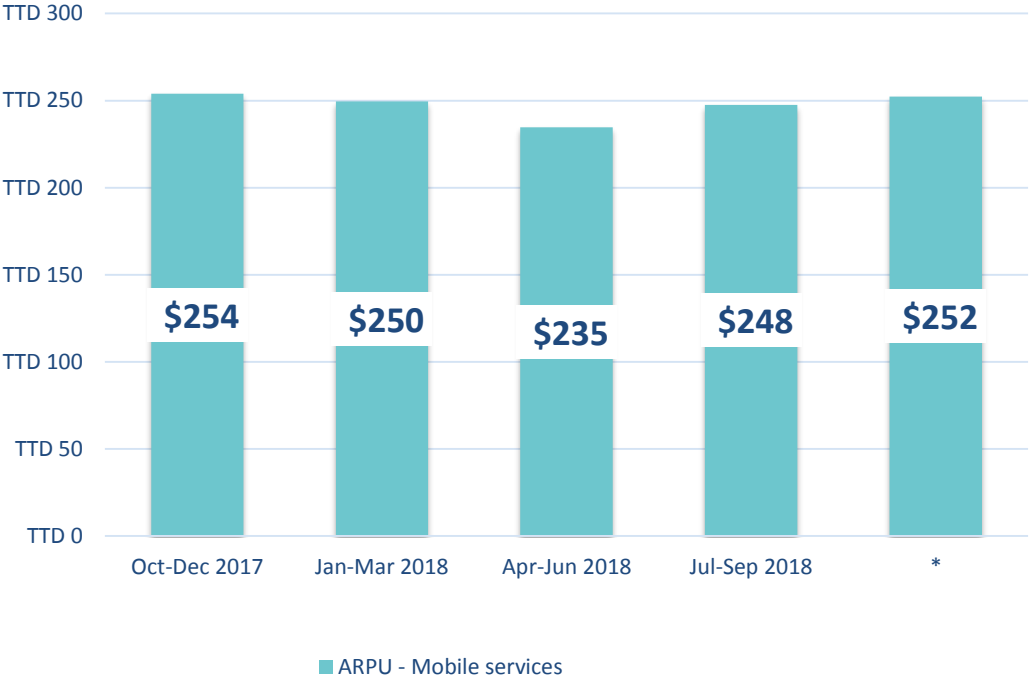
-0.8%



Q-o-Q  
PERCENT CHANGE

1.6%

ARPU FOR DOMESTIC MOBILE SERVICES  
Q4 2017 TO Q4 2018



• *Data estimated for the following concessionaire who had not submitted data at the date of publication:  
Digicel (Trinidad and Tobago) Limited*

# Fixed Broadband Subscriptions

TOTAL NUMBER OF  
SUBSCRIPTIONS

339,000

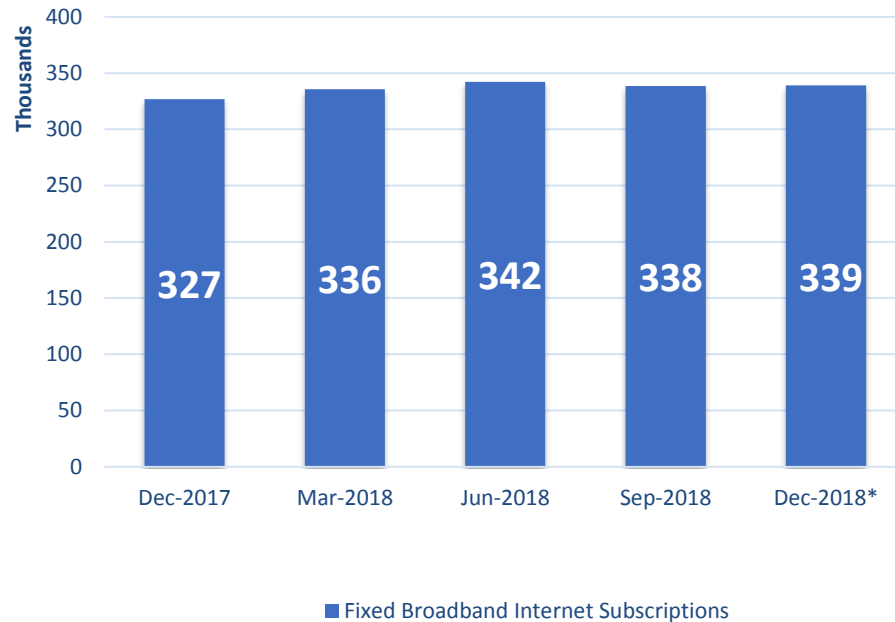
Y-o-Y  
PERCENT CHANGE

3.7%

Q-o-Q  
PERCENT CHANGE

0.3%

NUMBER OF FIXED INTERNET SUBSCRIPTIONS  
Q4 2017 TO Q4 2018



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited and Ampla Communications Limited*

# Fixed Internet Penetration



FIXED INTERNET  
PENETRATION PER  
100 INHABITANTS

25.0



Y-o-Y  
PERCENT CHANGE

3.3%



Y-o-Y  
PERCENT CHANGE

0.4%



FIXED INTERNET  
PENETRATION PER  
100 HOUSEHOLDS

80.4



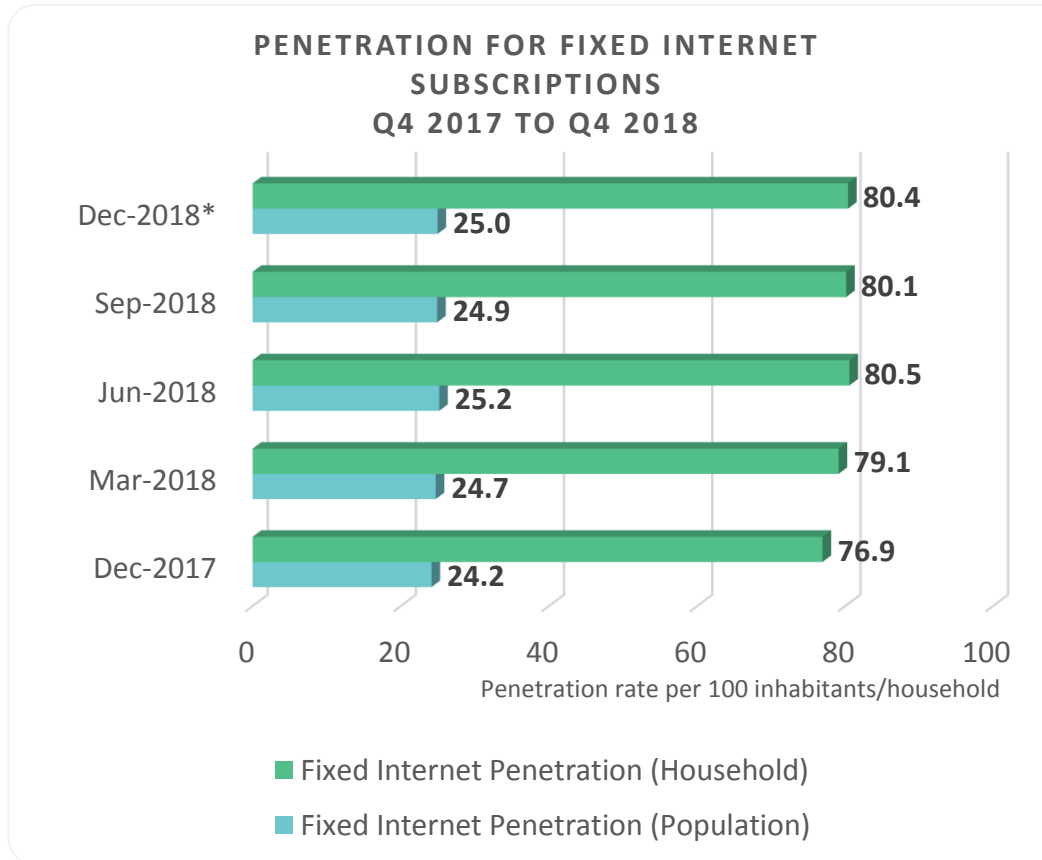
Y-O-Y  
PERCENT CHANGE

4.3%



Y-O-Y  
PERCENT CHANGE

0.1%



• *Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited and Amplia Communications Limited*



# Mobile Internet Penetration

MOBILE INTERNET  
PENETRATION PER 100  
INHABITANTS

47.2

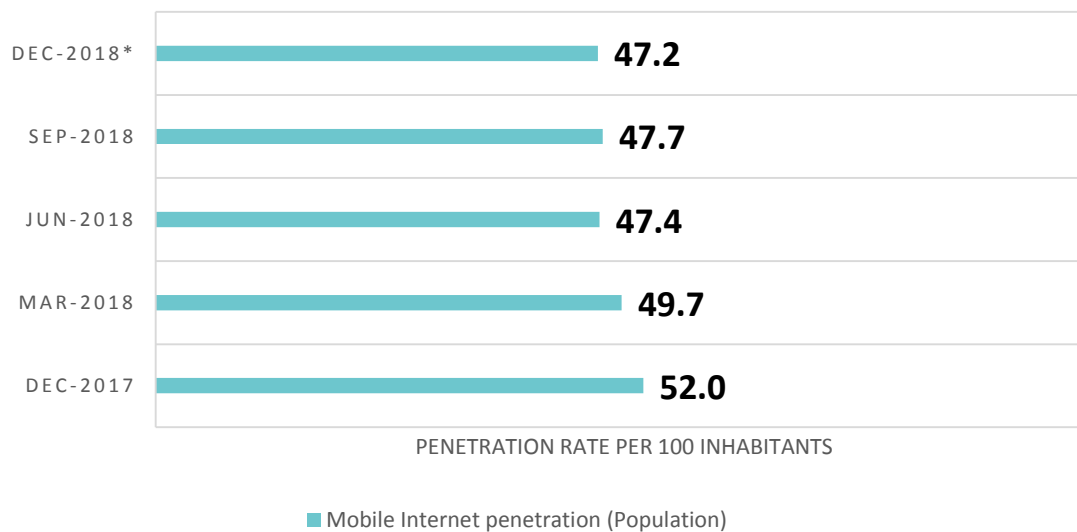
Y-o-Y  
PERCENT CHANGE

-9.2%

Y-o-Y  
PERCENT CHANGE

-1.0%

PENETRATION FOR MOBILE INTERNET SUBSCRIPTIONS  
Q4 2017 TO Q4 2018



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

- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Digicel (Trinidad and Tobago) Limited*

# Fixed Internet Revenues



GROSS REVENUES

**\$282.4m**



Y-o-Y  
PERCENT CHANGE

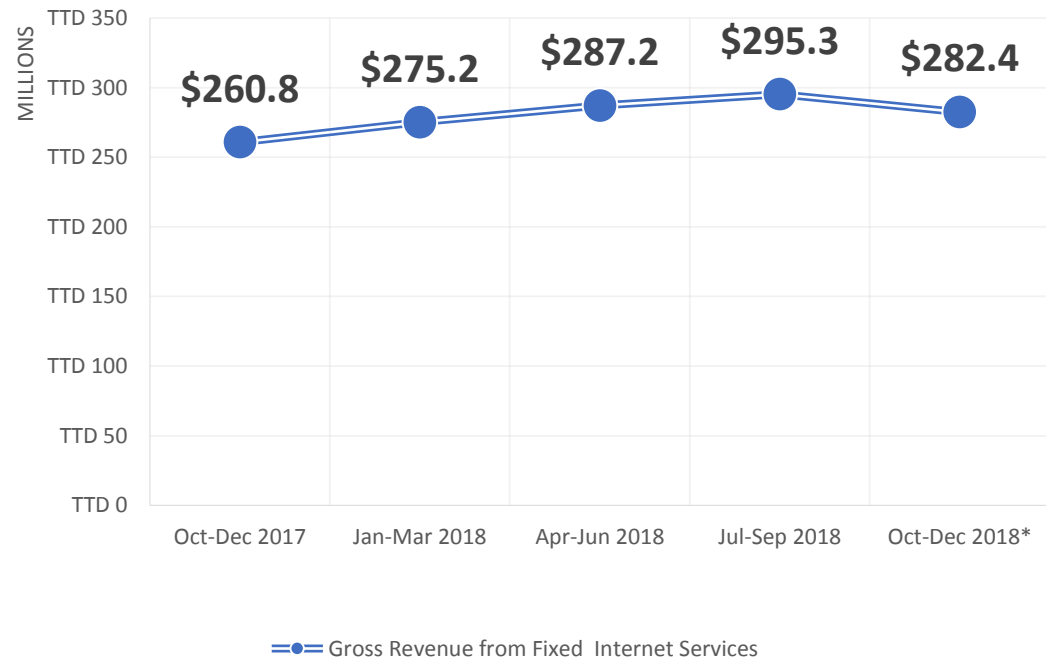
**8.0%**



Q-o-Q  
PERCENT CHANGE

**-4.4%**

GROSS REVENUES FROM FIXED INTERNET SERVICES  
Q4 2017 TO Q4 2018



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited and Amplia Communications Limited*

# Fixed Internet HHI



HHI

3,033



Y-o-Y  
PERCENT CHANGE

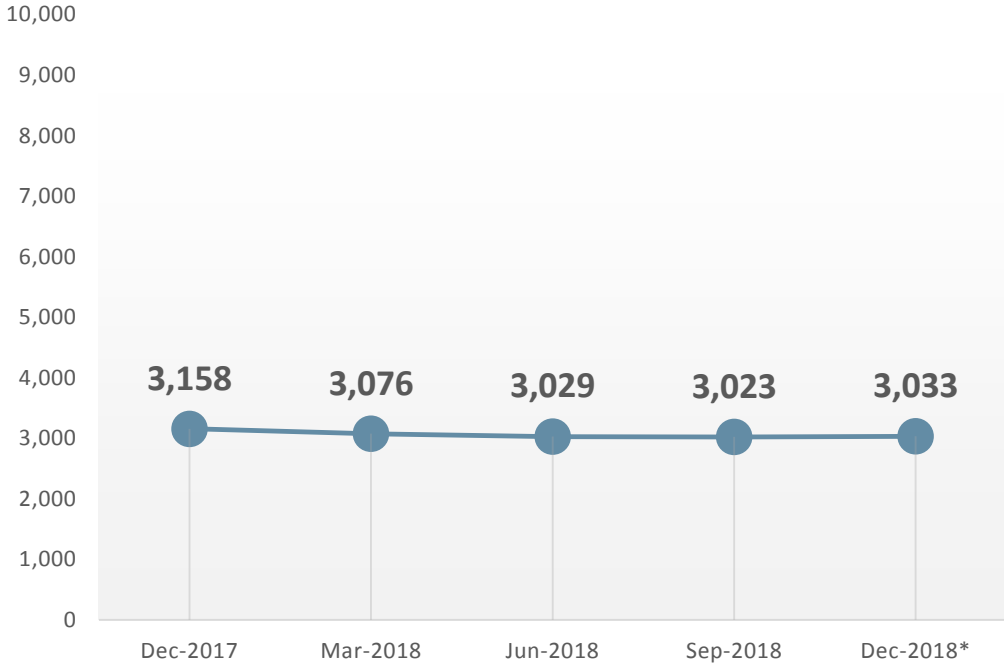
-4.0%



Q-o-Q  
PERCENT CHANGE

0.3%

HHI FOR FIXED INTERNET SERVICES  
Q4 2017 TO Q4 2018



• Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited and Amplia Communications Limited

# Fixed Internet Average Revenue Per User

ARPU

\$

\$863

Y-o-Y

PERCENT CHANGE

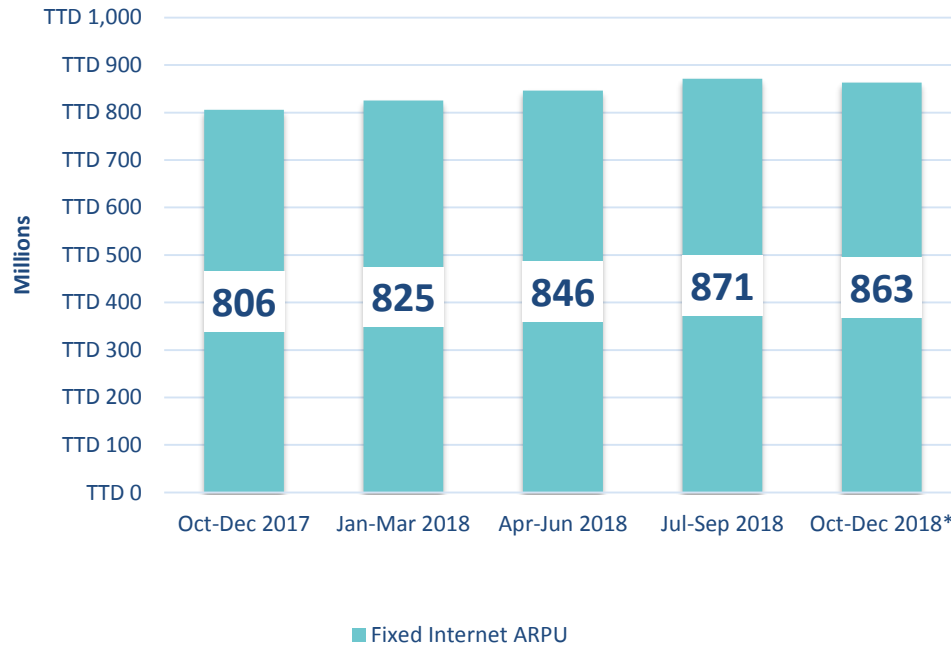
7.1%

Q-o-Q

PERCENT CHANGE

-0.9%

ARPU FOR FIXED INTERNET SERVICES  
Q4 2017 TO Q4 2018



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited and Amplia Communications Limited*

# Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

235,000



Y-o-Y PERCENT CHANGE

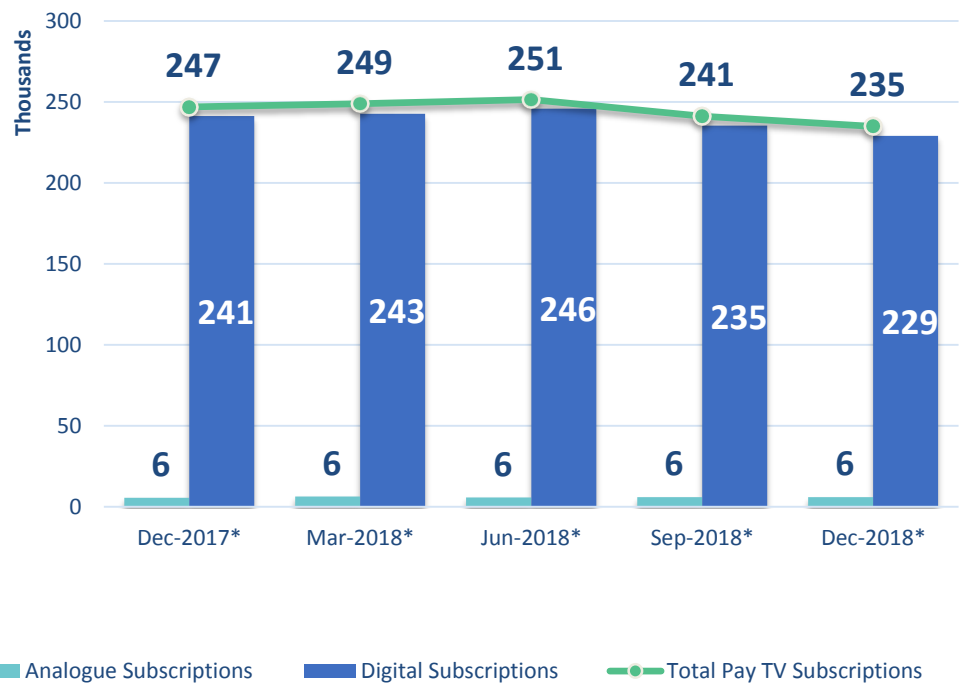
-4.9%



Q-o-Q PERCENT CHANGE

-2.5%

NUMBER OF SUBSCRIPTION TV SUBSCRIPTIONS  
Q4 2017 TO Q4 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

16.9



Y-o-Y  
PERCENT CHANGE

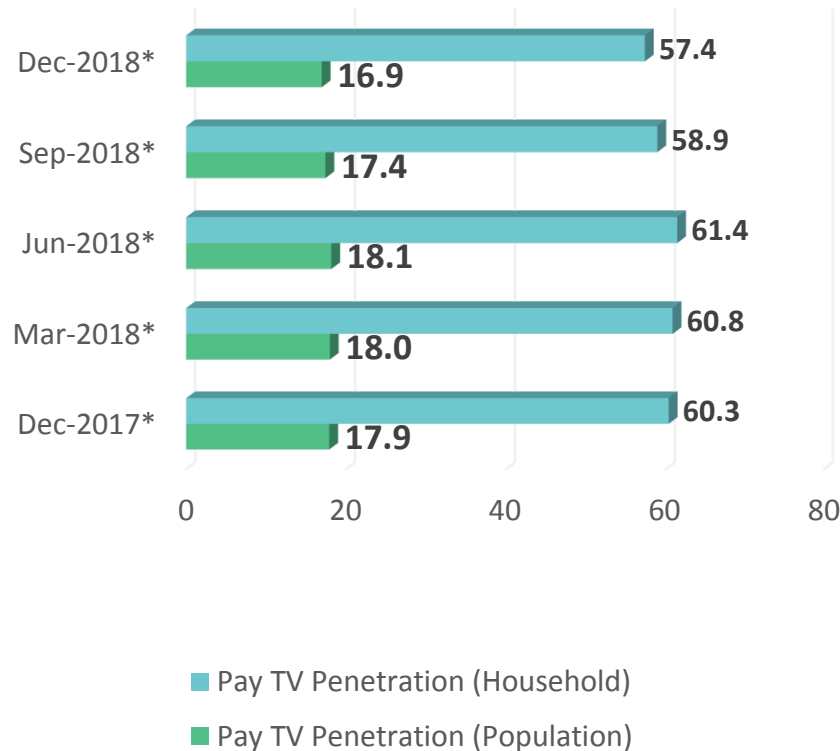
-5.6%



Y-o-Y  
PERCENT CHANGE

-2.9%

PENETRATION RATE OF SUBSCRIPTION TV  
SUBSCRIPTIONS  
Q4 2017 TO Q4 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 PER  
100 HOUSEHOLDS

57.4



Y-O-Y  
PERCENT CHANGE

-4.8%



Y-O-Y  
PERCENT CHANGE

-2.5%

# Pay TV Revenues



GROSS REVENUES

\$168.2m



Y-o-Y  
PERCENT CHANGE

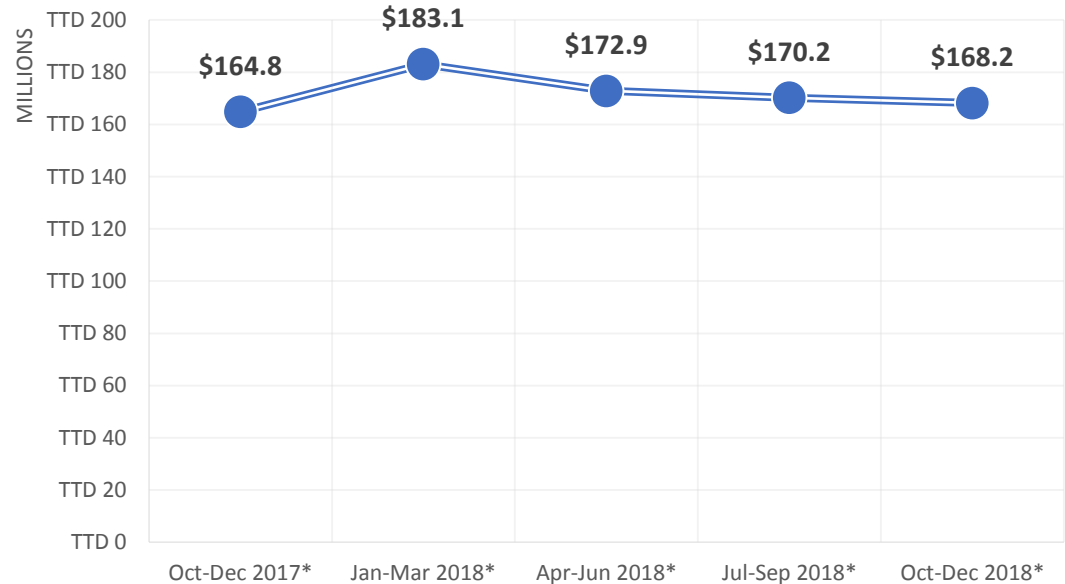
1.8%



Q-o-Q  
PERCENT CHANGE

-1.2%

GROSS REVENUES FROM SUBSCRIPTION TV SERVICES  
Q4 2017 TO Q4 2018



—●— Gross Revenues from Pay TV Subscriptions

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

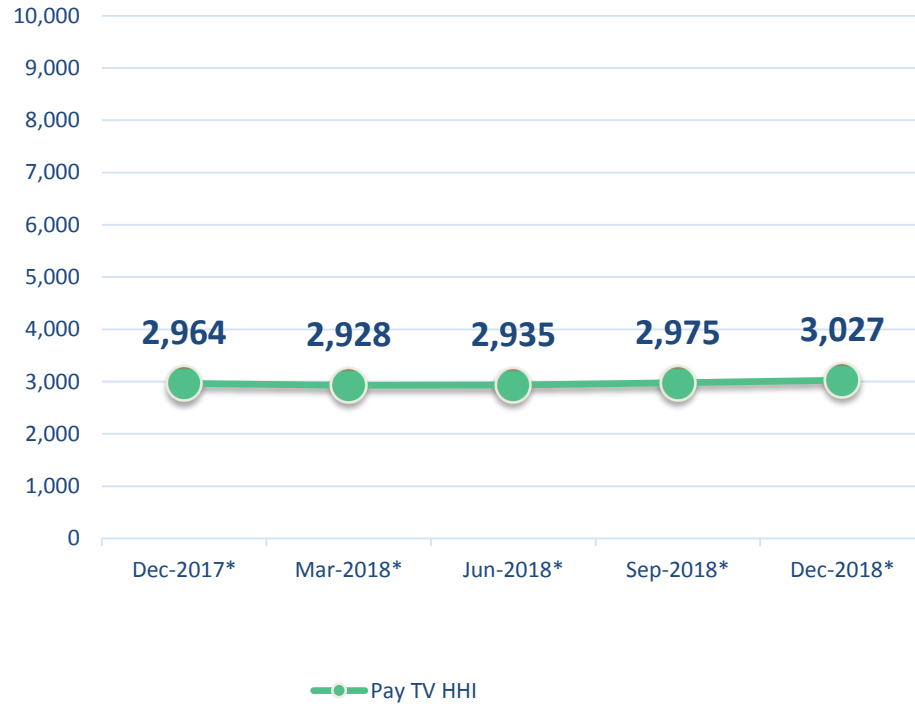


HHI

3,027

# Pay TV HHI

HHI FOR PAY TV SERVICES  
Q4 2017 TO Q4 2018



Y-o-Y  
PERCENT CHANGE

2.1%



Q-o-Q  
PERCENT CHANGE

1.7%

- *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

\$

\$725

Y-o-Y

PERCENT CHANGE

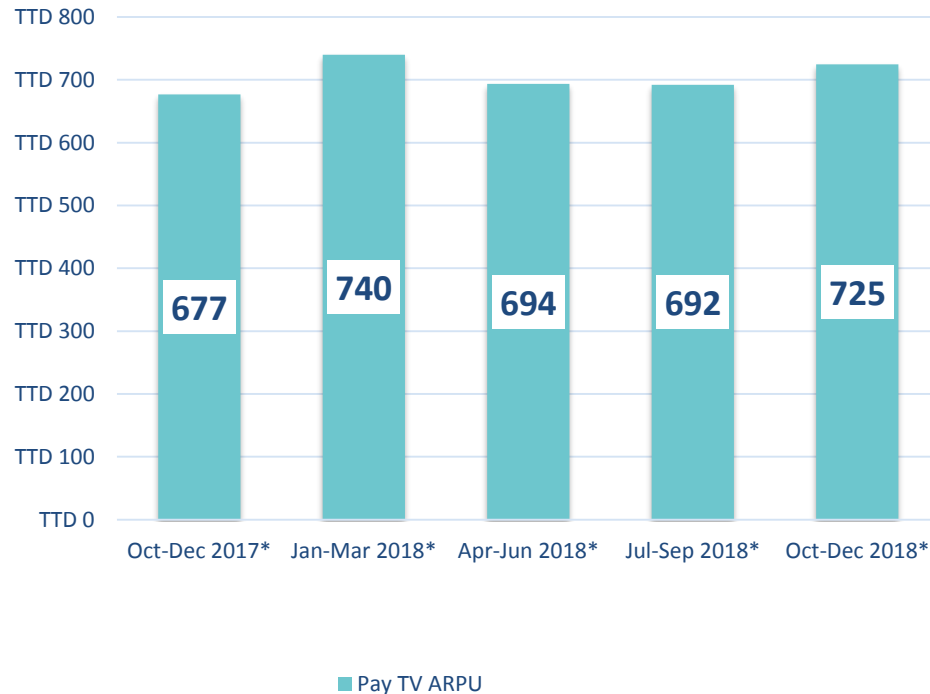
7.1%

Q-o-Q

PERCENT CHANGE

4.8%

ARPU FOR SUBSCRIPTION TV SERVICES  
Q4 2017 TO Q4 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

**\$38.4m**



Y-o-Y  
PERCENT CHANGE

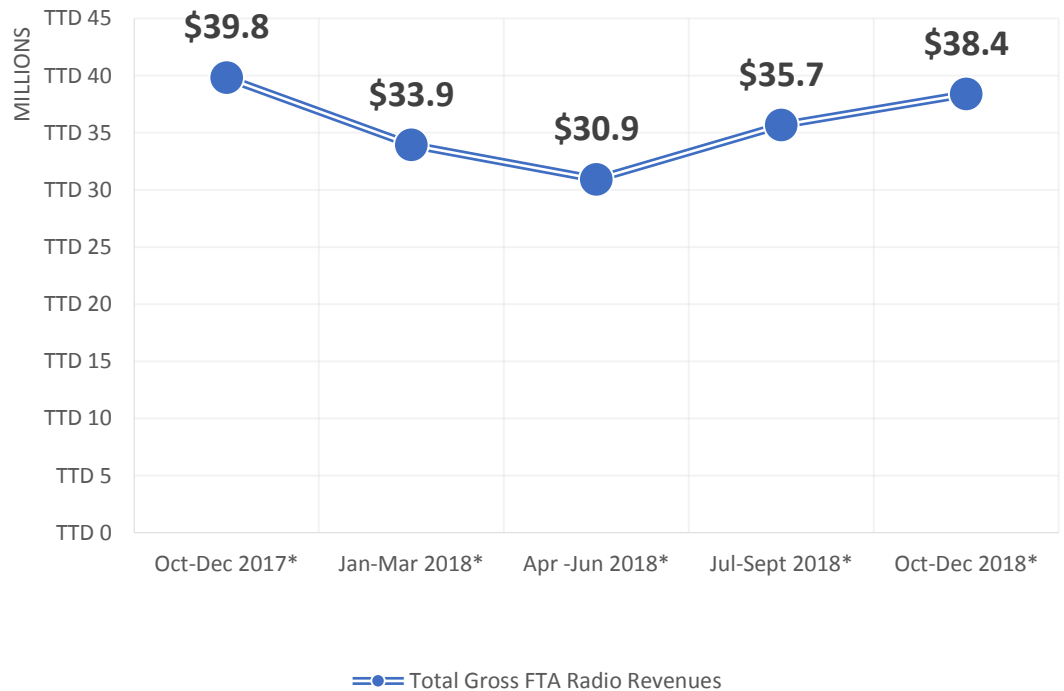
**-3.5%**



Q-o-Q  
PERCENT CHANGE

**7.6%**

GROSS REVENUES FROM FREE-TO-AIR RADIO SERVICES  
Q4 2017 TO Q4 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

483



Y-o-Y  
PERCENT CHANGE

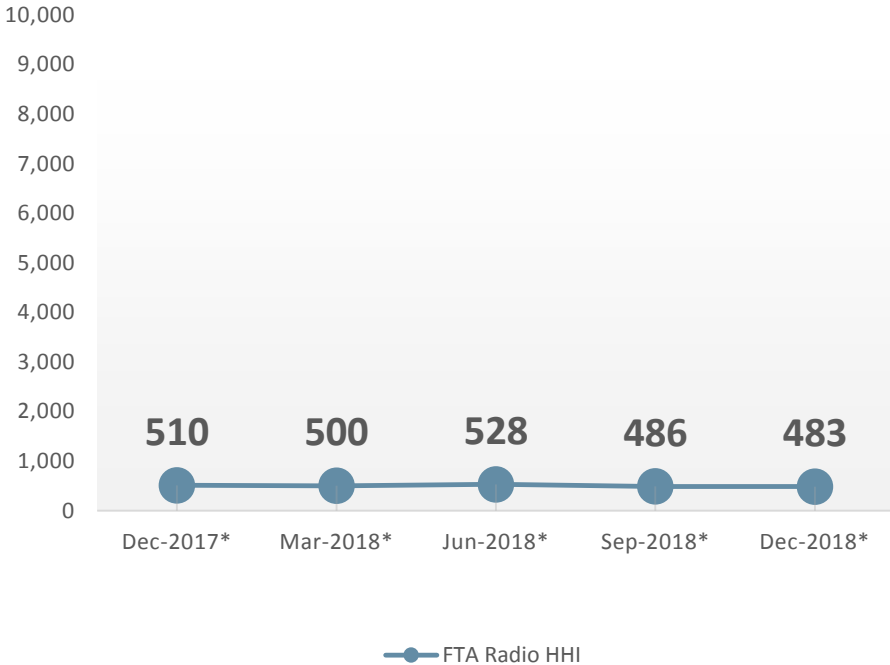
-5.3%



Q-o-Q  
PERCENT CHANGE

-0.6%

HHI FOR FREE-TO-AIR RADIO SERVICES  
Q4 2017 TO Q4 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  
**\$16.3m**

**Y-o-Y**  
PERCENT CHANGE  
**-18.4%**

**Q-o-Q**  
PERCENT CHANGE  
**-21.5%**

GROSS REVENUES FROM FREE TO AIR TV SERVICES  
Q4 2017 TO Q4 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

4,753



Y-o-Y  
PERCENT CHANGE

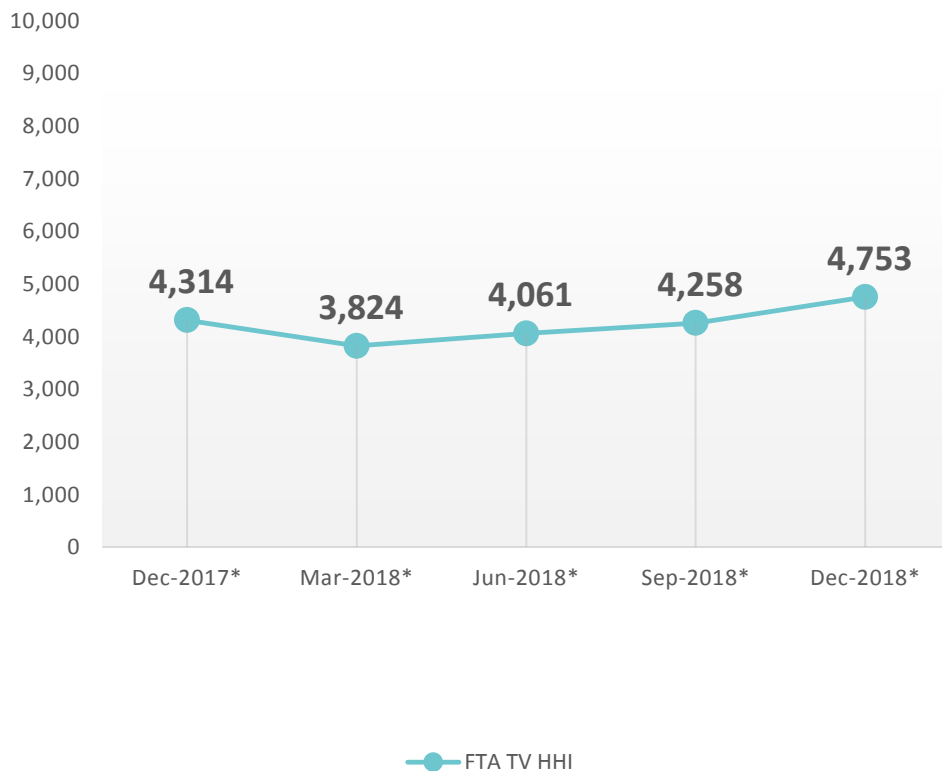
8.9%



Q-o-Q  
PERCENT CHANGE

10.0%

HHI FOR FREE TO AIR TV SERVICES  
Q4 2017 TO Q4 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

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October to December 2018