



QUARTERLY MARKET UPDATE

April to June 2019

Quarterly Market Update – Q2 2019

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© December 2019

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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) **1,359,193 (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

331,000



Y-o-Y PERCENT CHANGE

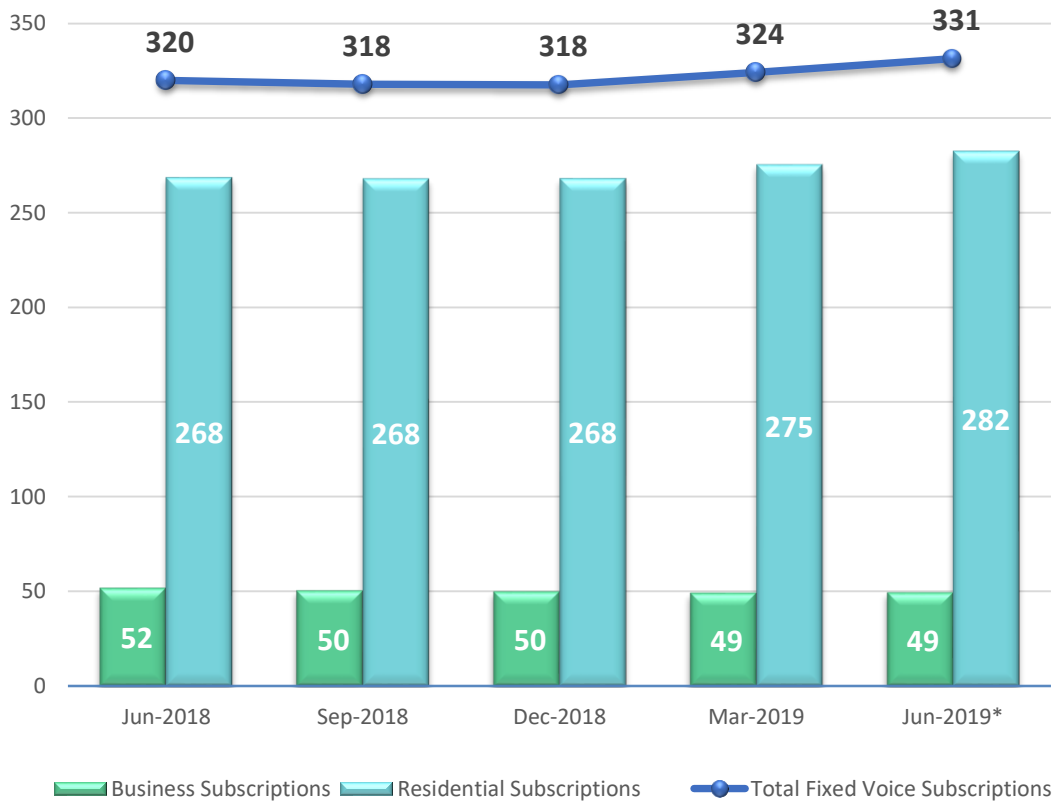
3.6%



Q-o-Q PERCENT CHANGE

2.3%

Number of Fixed Line Subscriptions
Q2 2018 to Q2 2019



• Data estimated for the following concessionaire who had not submitted data at the date of publication: Telecommunications Services of Trinidad & Tobago (TSTT) Limited.

Fixed Voice Penetration



FIXED VOICE
PENETRATION PER
100 INHABITANTS

24.3



Y-o-Y
PERCENT CHANGE

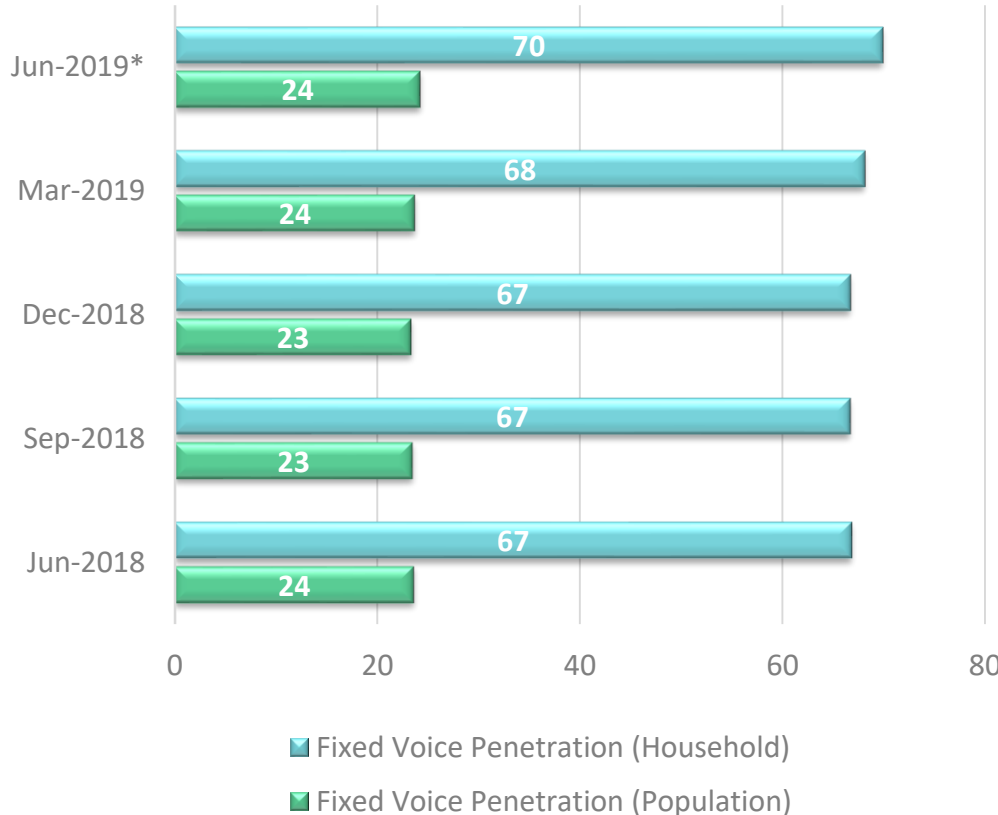
2.7%



Q-o-Q
PERCENT CHANGE

2.3%

Penetration Rate of Fixed Line Subscriptions
Q2 2018 to Q2 2019



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

69.9



Y-o-Y
PERCENT CHANGE

4.6%



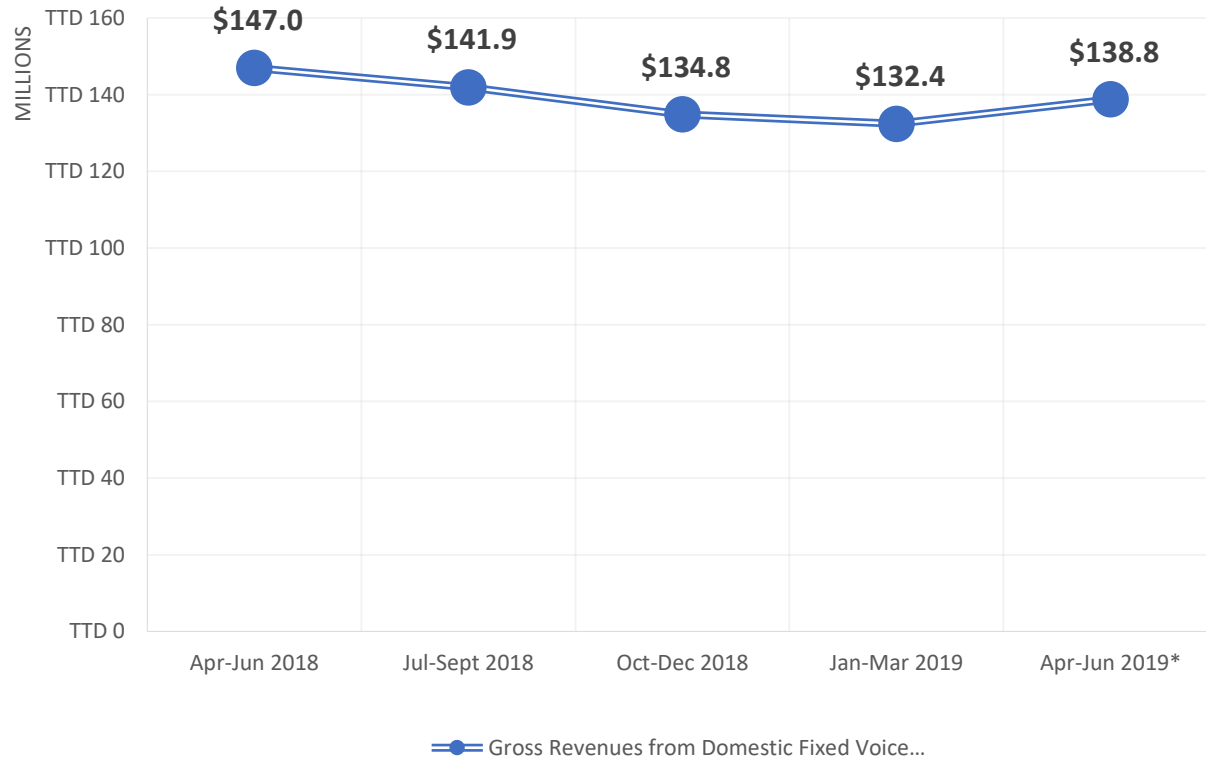
Q-o-Q
PERCENT CHANGE

2.6%

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

Fixed Voice Revenues

Gross Revenues from Domestic Fixed Voice Services
Q2 2018 to Q2 2019



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

\$ GROSS REVENUES
\$138.8m

Y-o-Y
PERCENT CHANGE
-5.6%

Q-o-Q
PERCENT CHANGE
4.8%

Fixed Voice HHI



HHI

3,907



Y-o-Y
PERCENT CHANGE

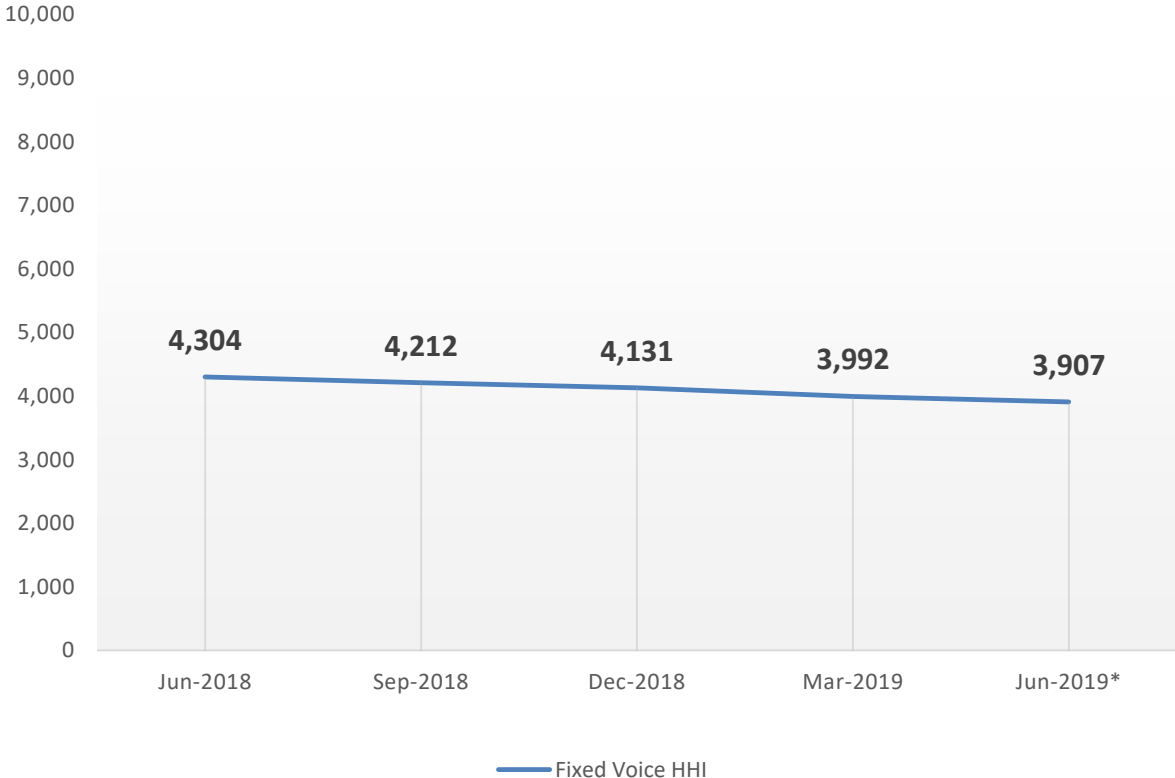
-9.2%



Q-o-Q
PERCENT CHANGE

-2.1%

HHI for Domestic Fixed Voice
Q2 2018 to Q2 2019



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

Fixed Voice Average Revenue Per User

ARPU

\$

\$421

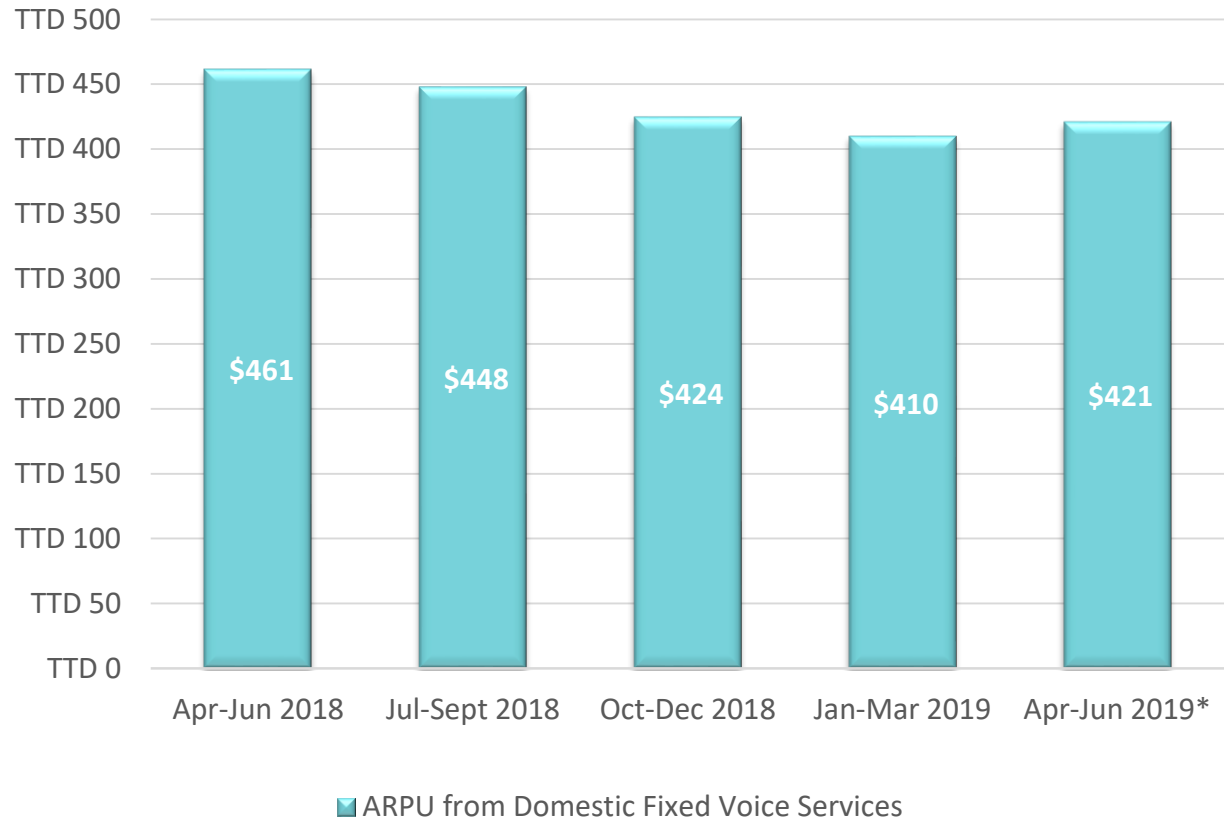
Y-o-Y
PERCENT CHANGE

-8.8%

Q-o-Q
PERCENT CHANGE

2.7%

ARPU for Domestic Fixed Line
Q2 2018 to Q2 2019



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

Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,060,000



Y-o-Y PERCENT CHANGE

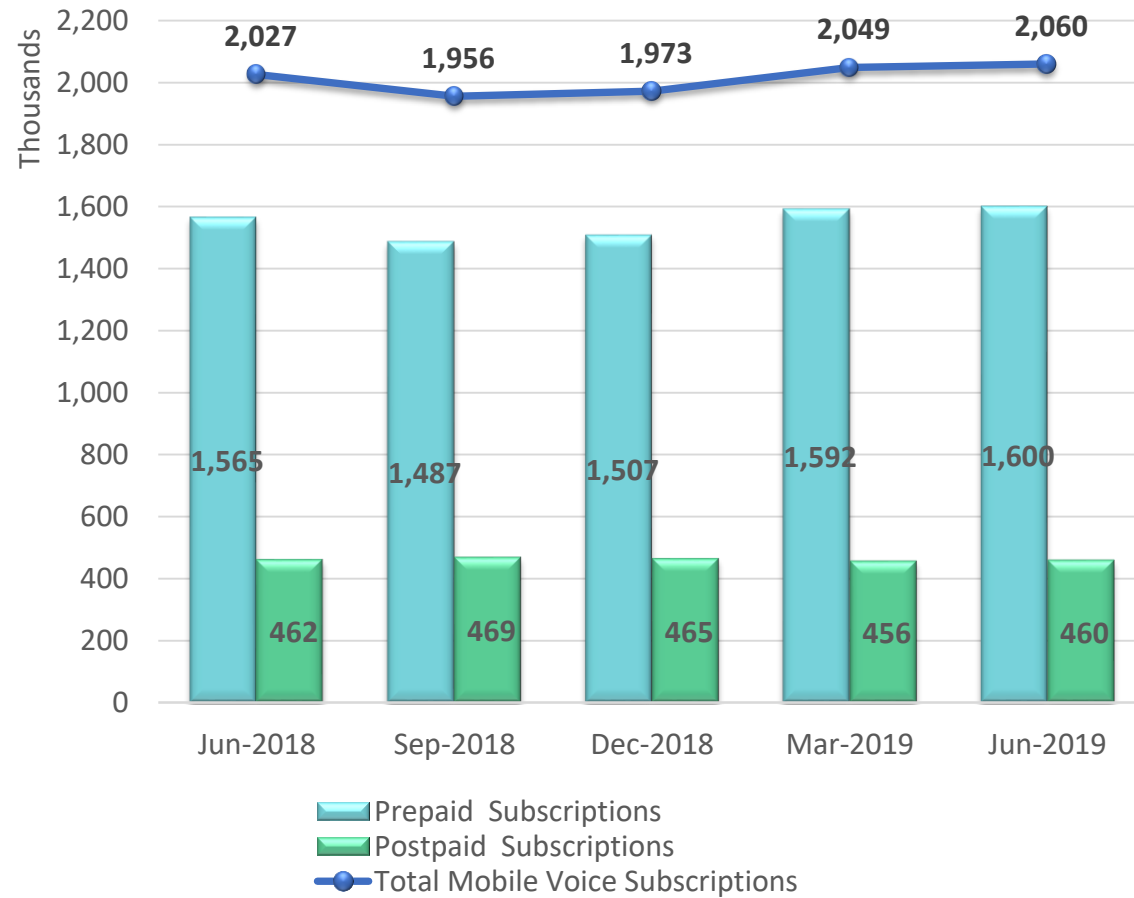
1.6%



Q-o-Q PERCENT CHANGE

0.5%

Number of Mobile Voice Subscriptions
Q2 2018 to Q2 2019



Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

151.6



Y-o-Y
PERCENT CHANGE

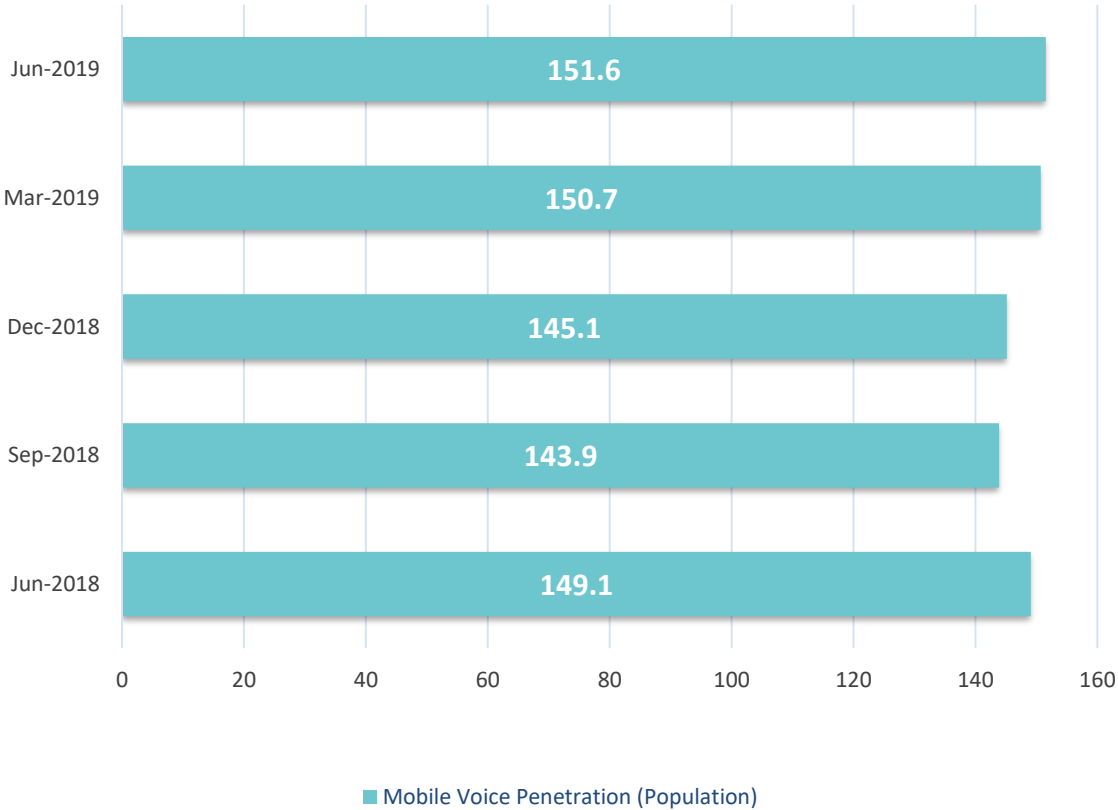
1.6%



Q-o-Q
PERCENT CHANGE

0.5%

Penetration of Mobile Voice Subscriptions
Q2 2018 to Q2 2019



Mobile Services Revenues

\$ GROSS REVENUES

\$489.6m



Y-o-Y
PERCENT CHANGE

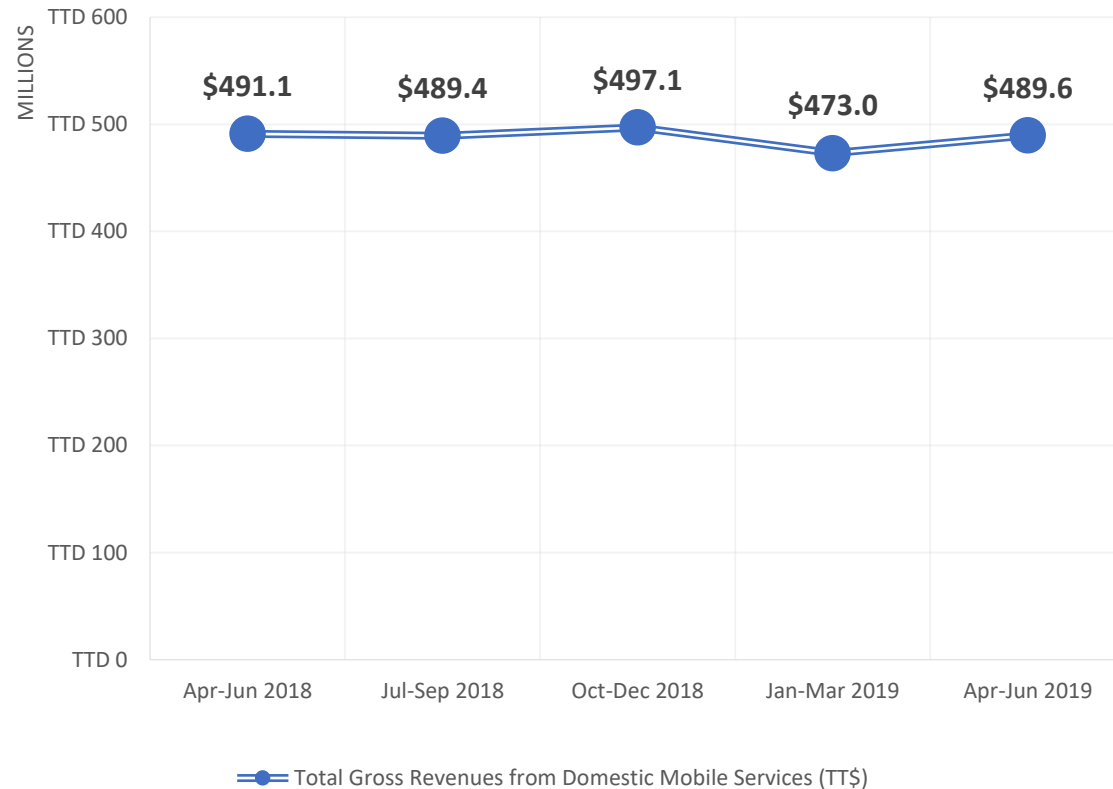
-0.3%



Q-o-Q
PERCENT CHANGE

3.5%

Total Gross Revenues from Domestic Mobile Services (TT\$)
Q2 2018 to Q2 2019



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,086



Y-o-Y
PERCENT CHANGE

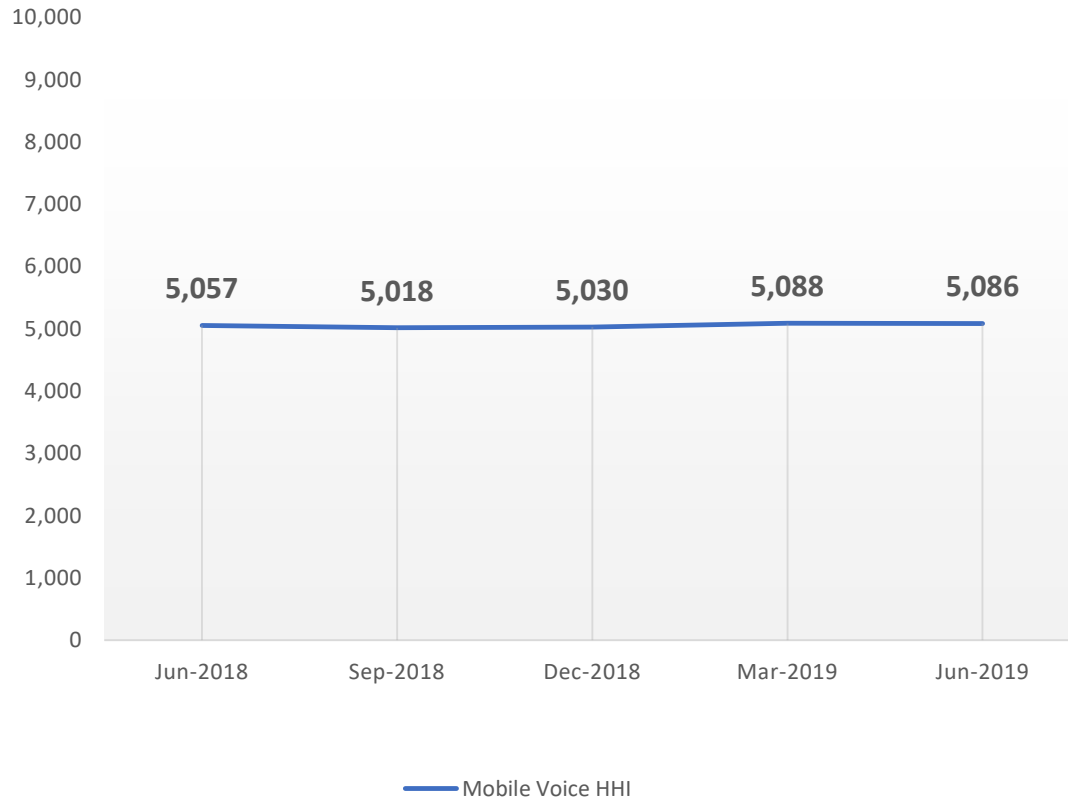
0.6%



Q-o-Q
PERCENT CHANGE

-0.03%

HHI for Domestic Mobile Services
Q2 2018 to Q2 2019



Average Revenue Per User

Mobile Services



ARPU

\$238



Y-o-Y
PERCENT CHANGE

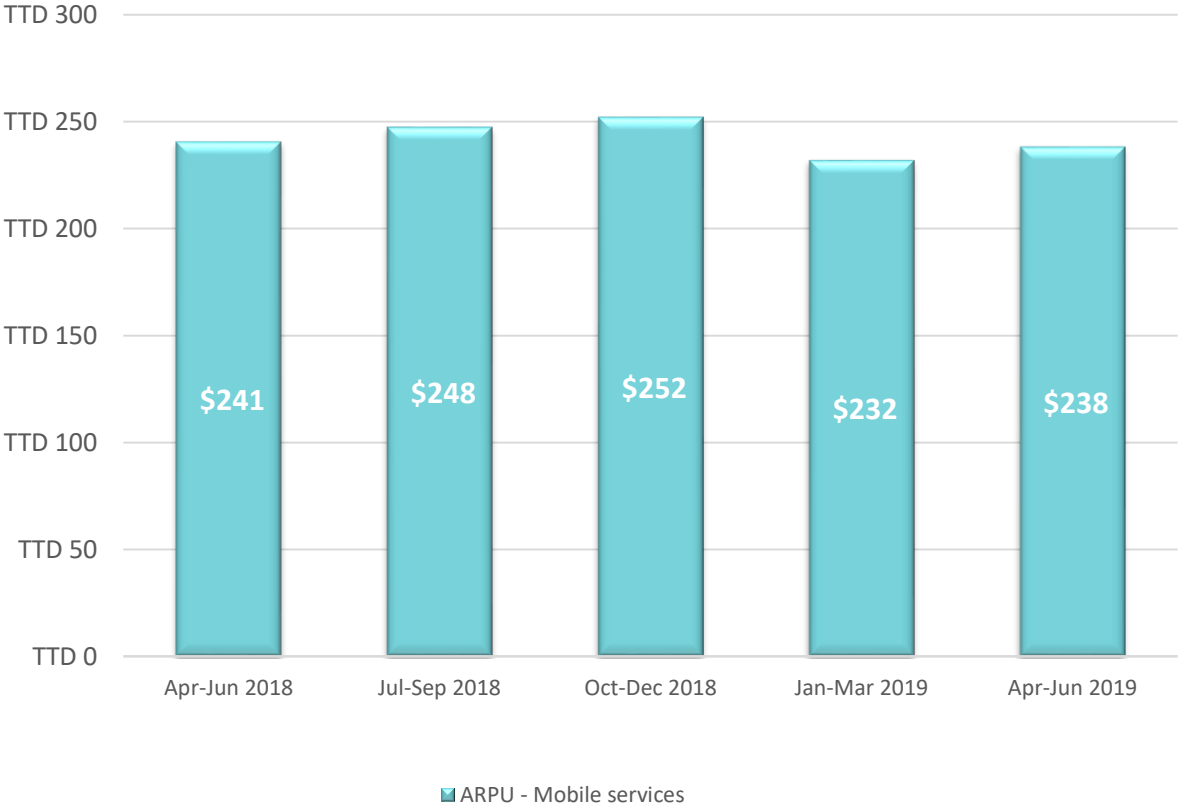
-1.0%



Q-o-Q
PERCENT CHANGE

2.7%

ARPU for Domestic Mobile Services
Q2 2018 to Q2 2019



Fixed Broadband Subscriptions

TOTAL NUMBER OF SUBSCRIPTIONS

328,706

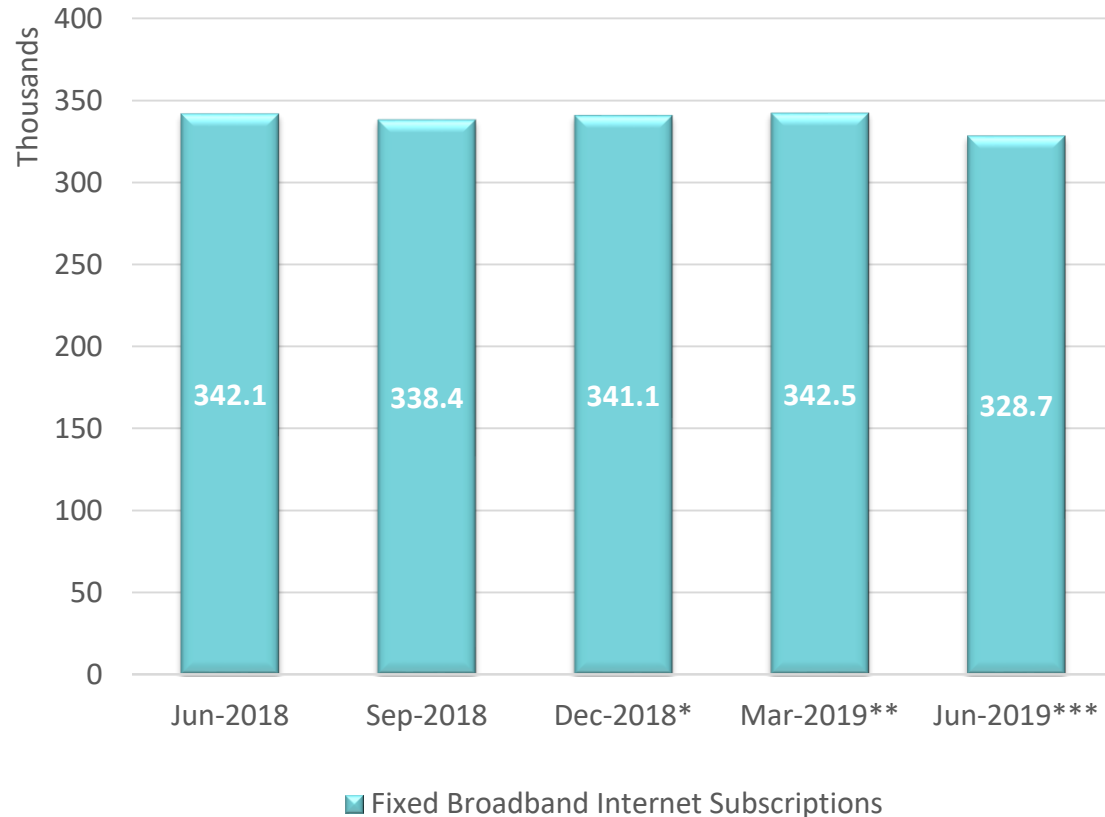
Y-o-Y PERCENT CHANGE

-3.9%

Q-o-Q PERCENT CHANGE

-4.0%

Number of Fixed Internet Subscriptions
Q2 2018 to Q2 2019



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

Fixed Internet Penetration



FIXED INTERNET
PENETRATION PER
100 INHABITANTS

24.2



Y-o-Y
PERCENT CHANGE

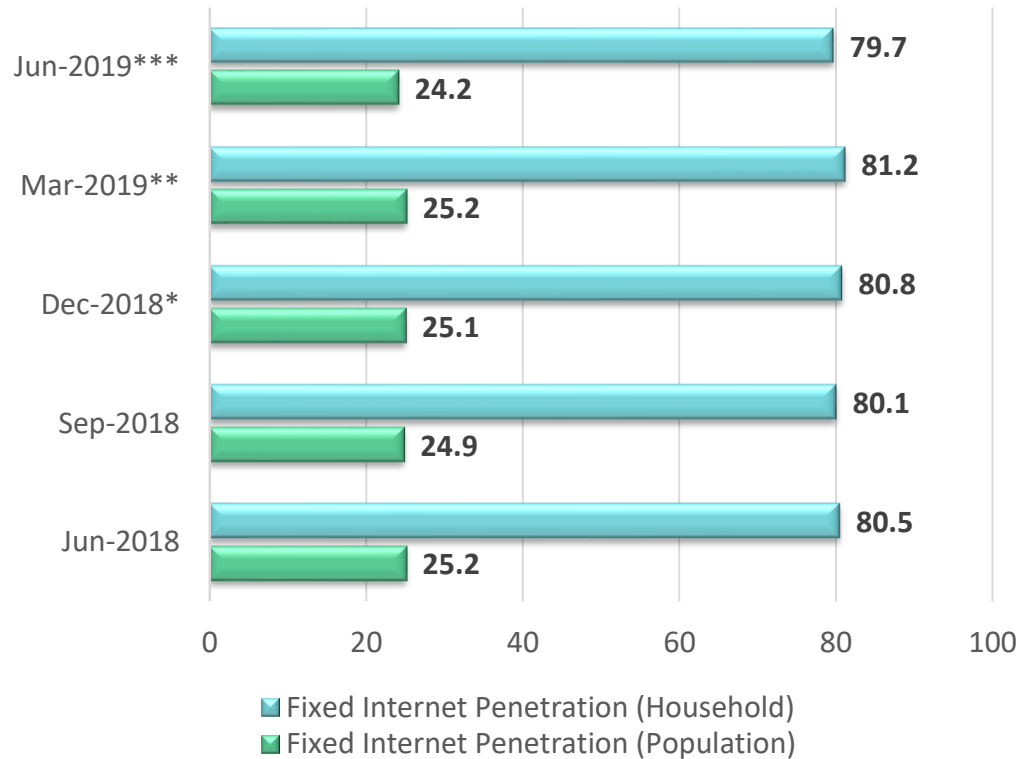
-3.9%



Q-o-Q
PERCENT CHANGE

-4.0%

Penetration for Fixed Internet Subscriptions
Q2 2018 to Q2 2019



FIXED INTERNET
PENETRATION PER
100 HOUSEHOLDS

79.7



Y-O-Y
PERCENT CHANGE

-1.0%



Q-O-Q
PERCENT CHANGE

-1.9%

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

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

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

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

49.2

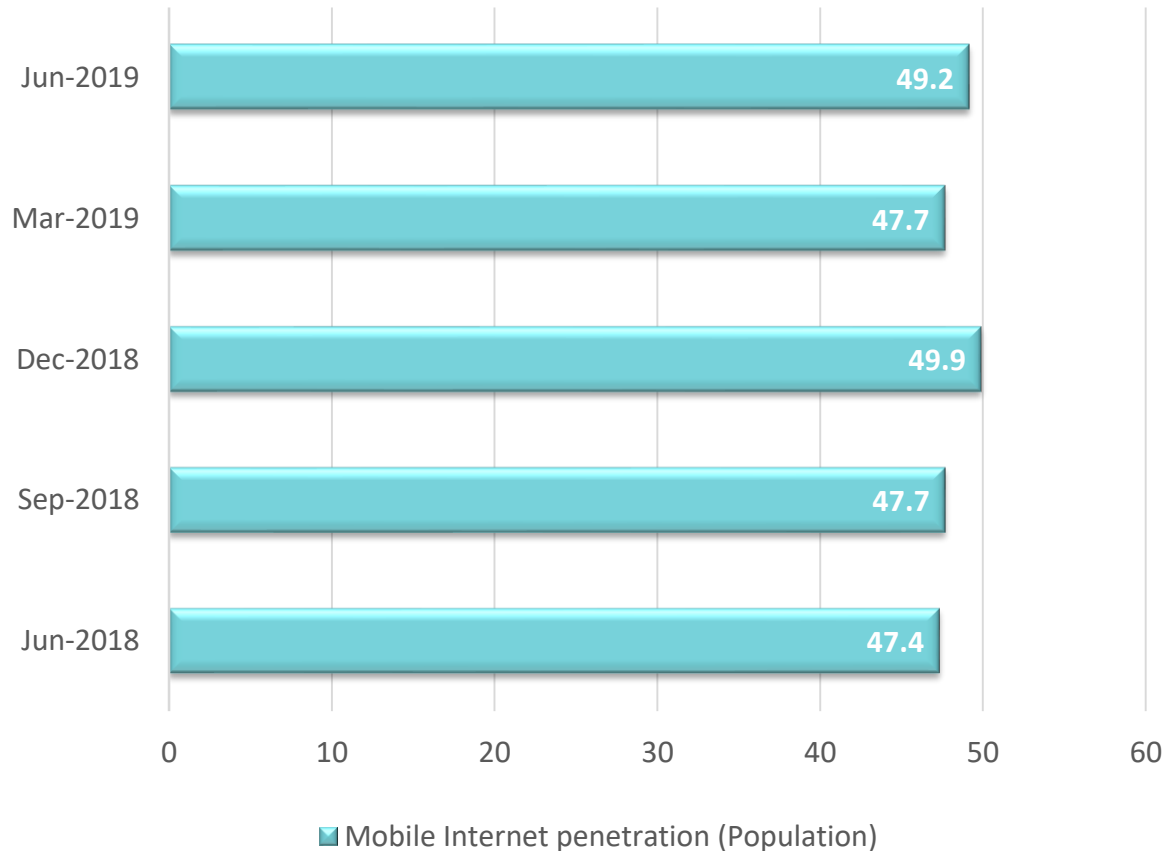
Y-o-Y
PERCENT CHANGE

3.8%

Q-o-Q
PERCENT CHANGE

3.1%

Penetration for Mobile Internet Subscriptions
Q2 2018 to Q2 2019



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

Fixed Internet Revenues

\$ GROSS REVENUES

\$263.6m



Y-o-Y
PERCENT CHANGE

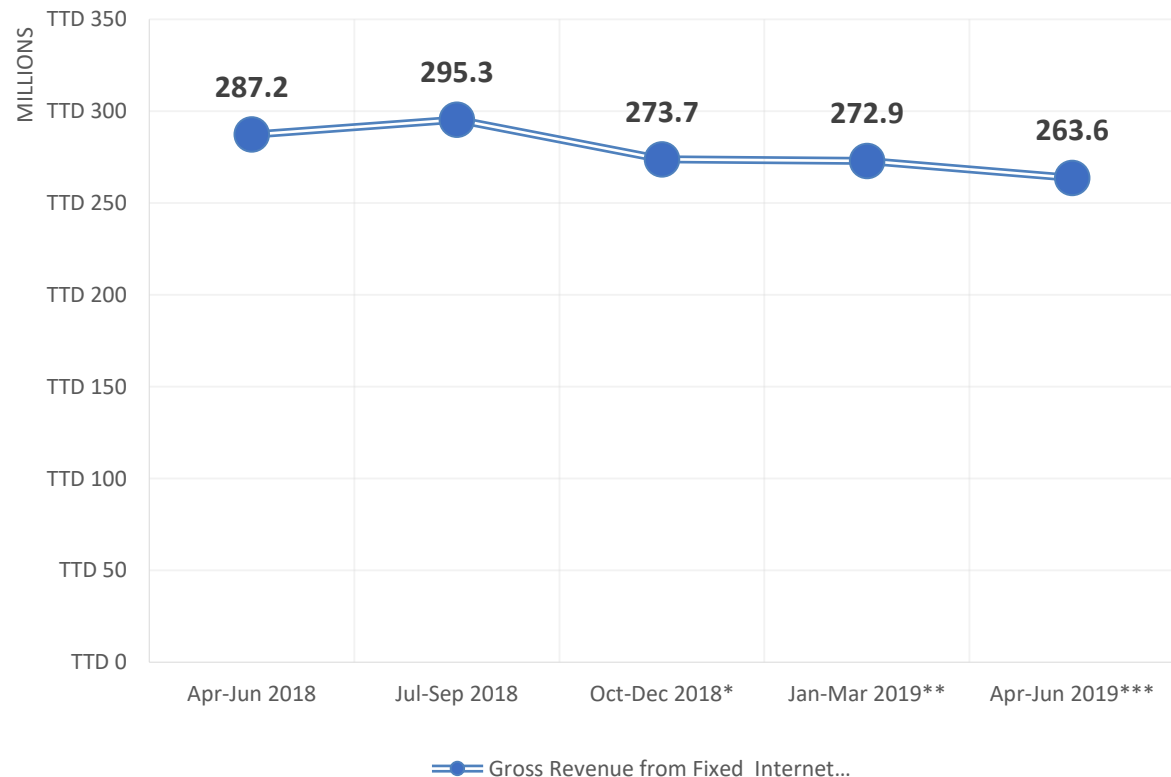
-8.2%



Q-o-Q
PERCENT CHANGE

-3.4%

Gross Revenues from Fixed Internet Services
Q2 2018 to Q2 2019



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

Fixed Internet HHI



HHI

3,003



Y-o-Y
PERCENT CHANGE

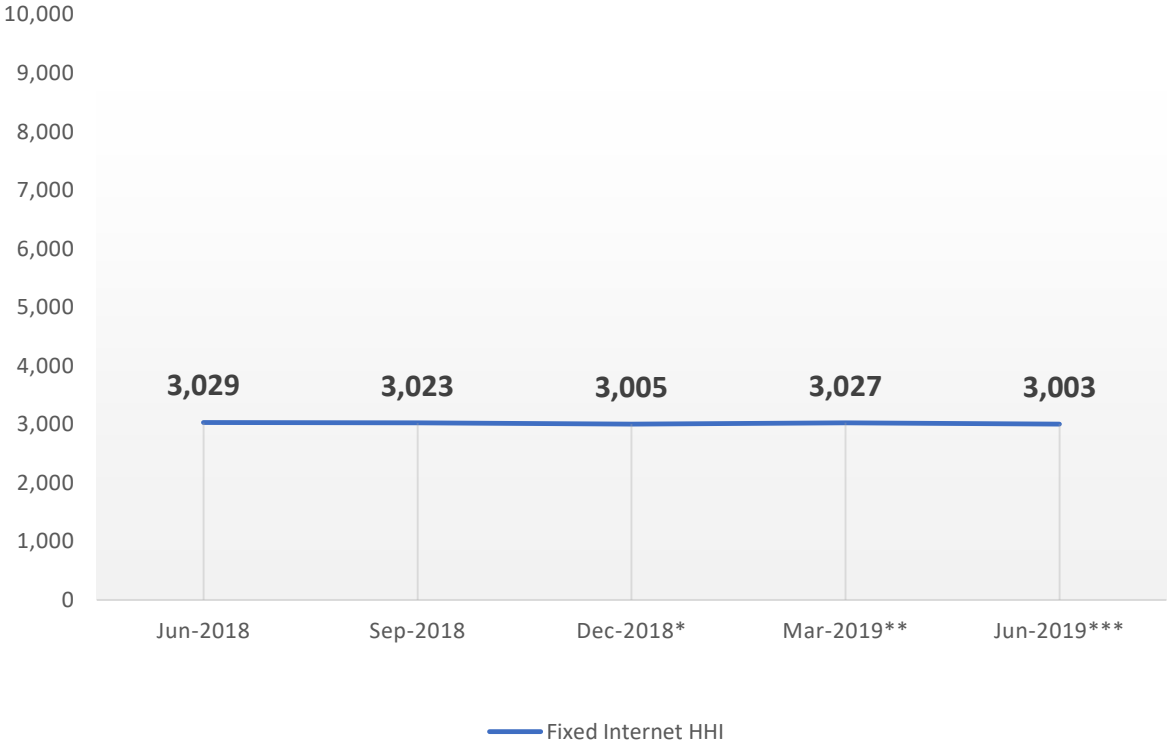
-0.9%



Q-o-Q
PERCENT CHANGE

-0.8%

HHI for Fixed Internet Services
Q2 2018 to Q2 2019



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

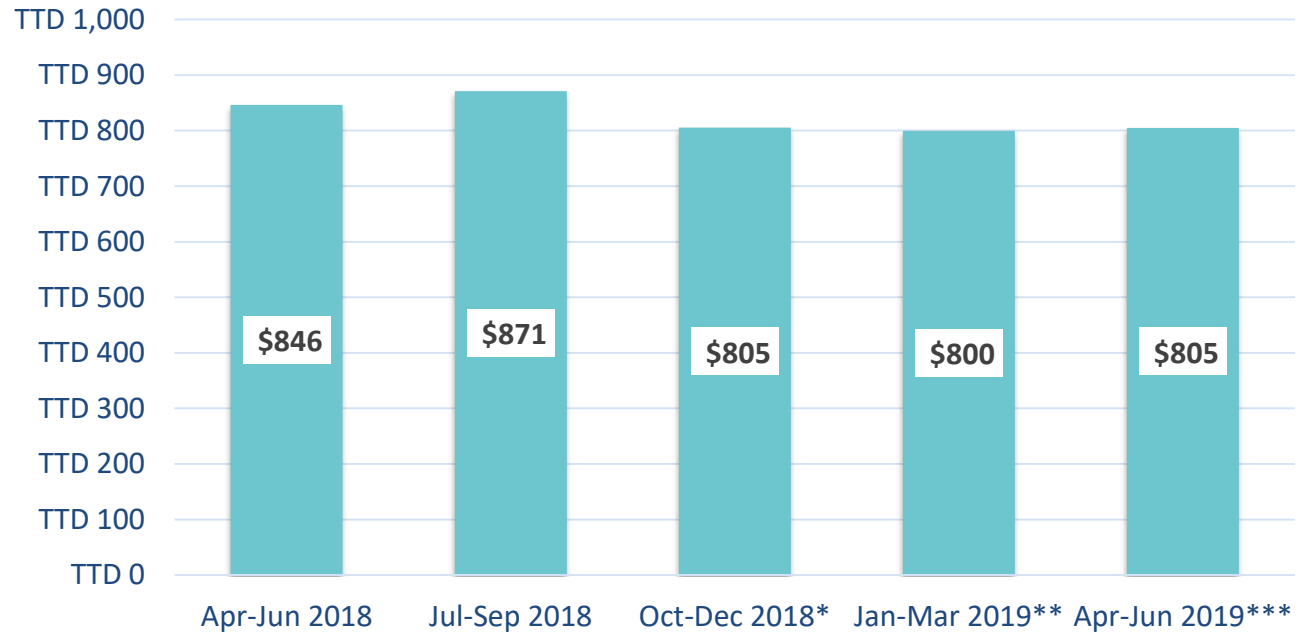
Fixed Internet Average Revenue Per User

ARPU



\$805

ARPU for Fixed Internet Services
Q2 2018 to Q2 2019



■ Fixed Internet ARPU



Y-o-Y
PERCENT CHANGE

-4.9%



Q-o-Q
PERCENT CHANGE

0.7%

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

Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

192,000



Y-o-Y PERCENT CHANGE

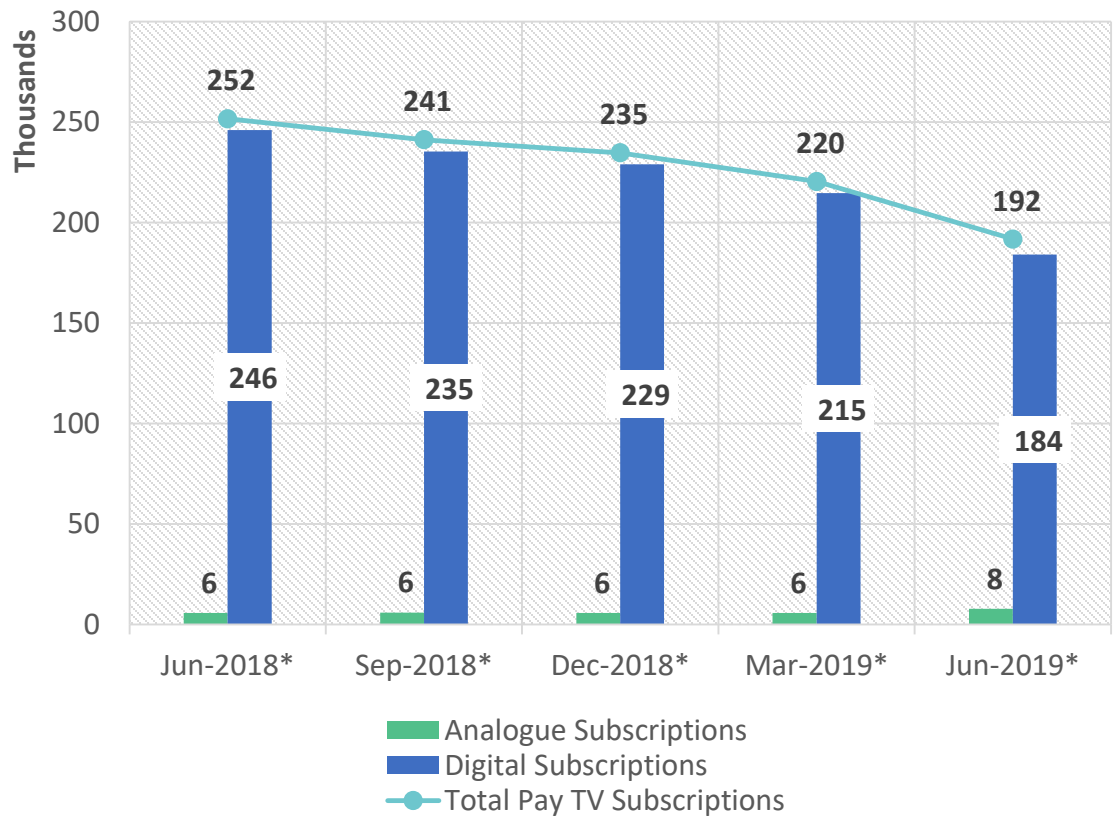
-23.8%



Q-o-Q PERCENT CHANGE

-13.0%

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

Pay TV Penetration



PAY TV
PENETRATION PER
100 INHABITANTS

13.7



Y-o-Y
PERCENT CHANGE

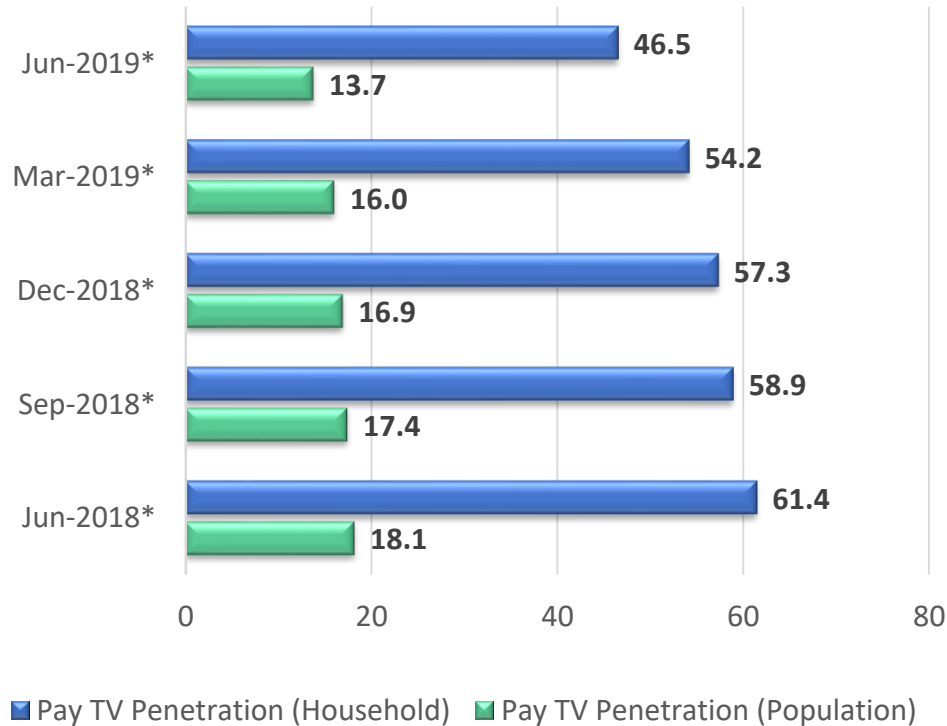
-24.3%



Q-o-Q
PERCENT CHANGE

-14.1%

Penetration Rates of Pay TV Subscriptions
Q2 2018 to Q2 2019



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



PAY TV
PENETRATION PER
100 HOUSEHOLDS

46.5



Y-o-Y
PERCENT CHANGE

-24.3%



Q-o-Q
PERCENT CHANGE

-14.1%

Pay TV Revenues



GROSS REVENUES

\$181.0m



Y-o-Y
PERCENT CHANGE

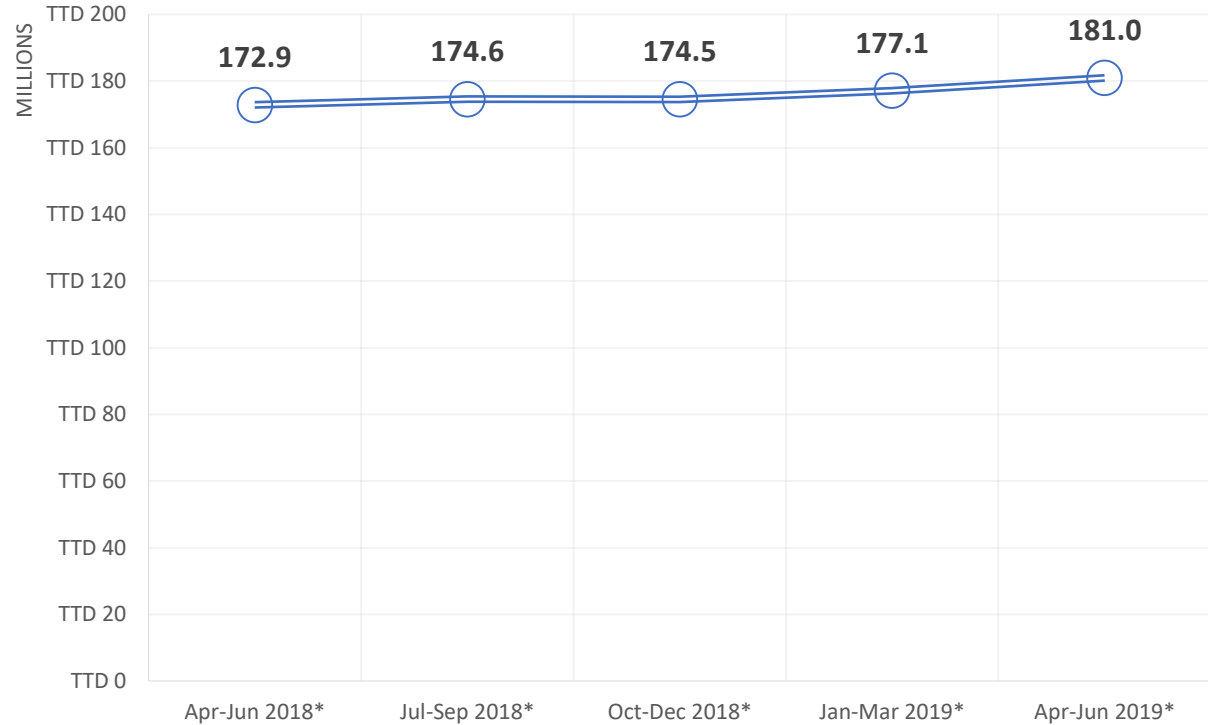
4.7%



Q-o-Q
PERCENT CHANGE

2.2%

Gross Revenues from Pay TV Services -
Q2 2018 to Q2 2019



—○— 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**



HHI

2,610



Y-o-Y
PERCENT CHANGE

12.3%



Q-o-Q
PERCENT CHANGE

-3.3%

Pay TV HHI

HHI for Subscription TV Services
Q2 2018 to Q2 2019



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

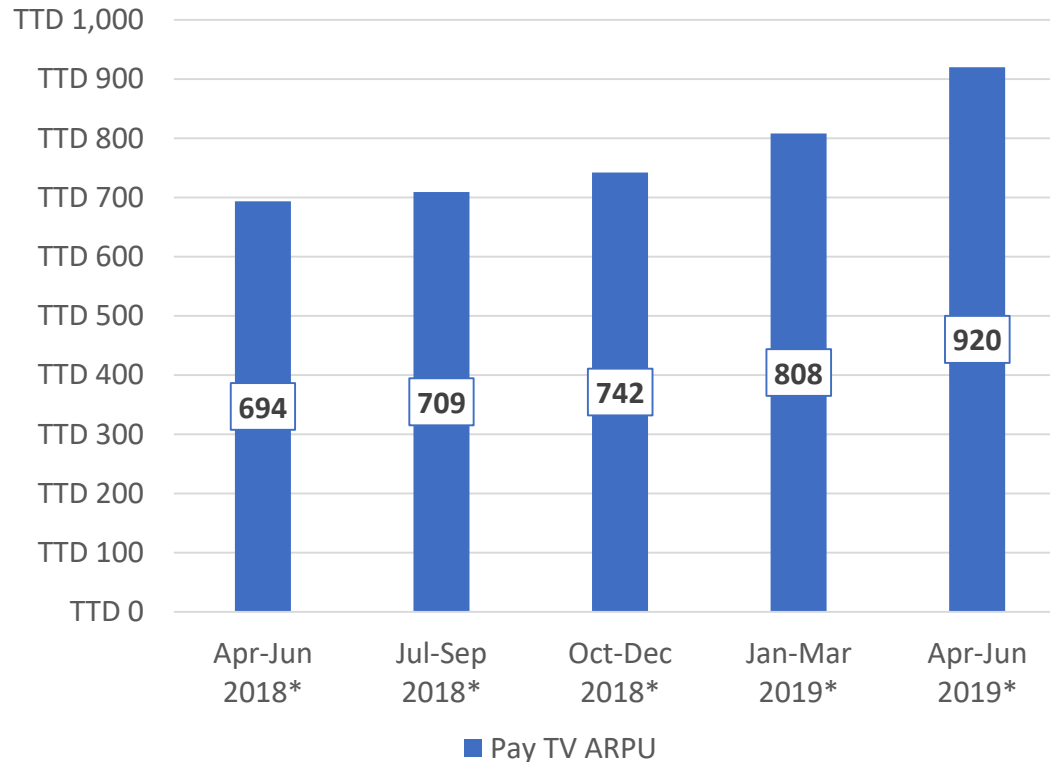
Pay TV

Average Revenue Per User

ARPU

\$
\$920

ARPU for Subscription TV
Q2 2018 to Q2 2019



Y-o-Y
PERCENT CHANGE

-24.3%

Q-o-Q
PERCENT CHANGE

13.8%

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

Free-to-Air Radio Revenues



GROSS REVENUES

\$31.4m



Y-o-Y
PERCENT CHANGE

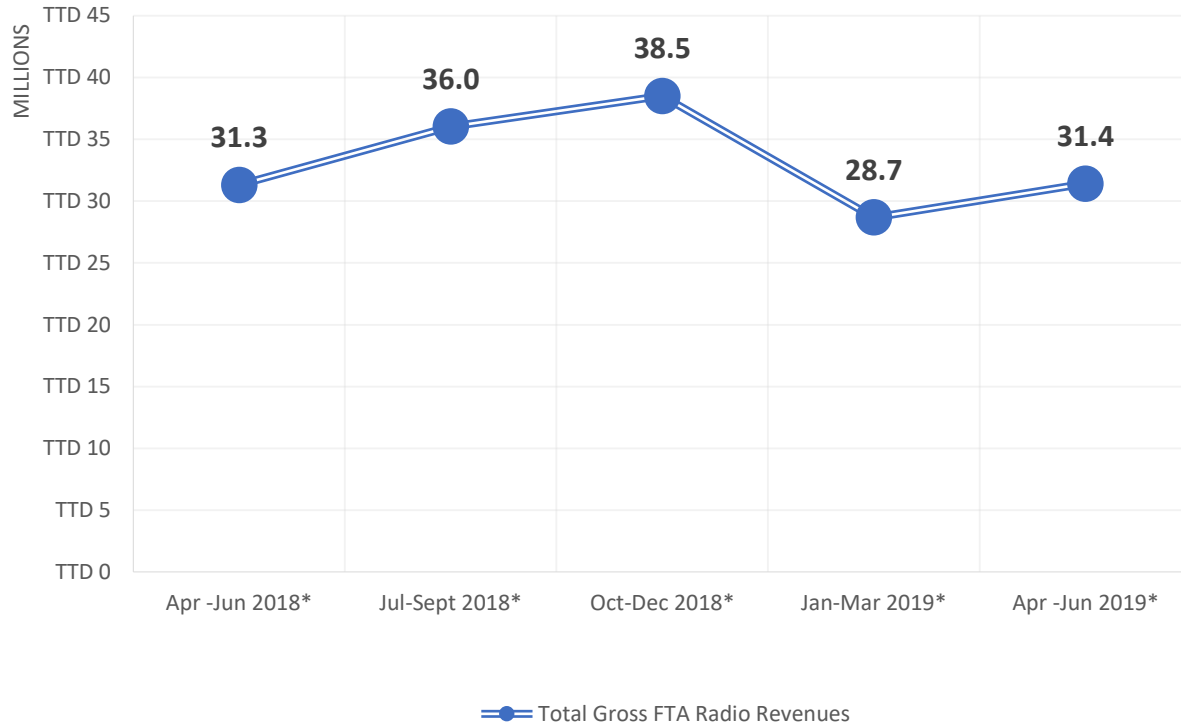
0.3%



Q-o-Q
PERCENT CHANGE

9.5%

Gross Revenues from Free to Air Radio Services
Q2 2018 to Q2 2019



- *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

485



Y-o-Y
PERCENT CHANGE

-6.6%



Q-o-Q
PERCENT CHANGE

4.1%

HHI for Free to Air Radio Services
Q2 2018 to Q2 2019



- **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

\$13.8m



Y-o-Y
PERCENT CHANGE

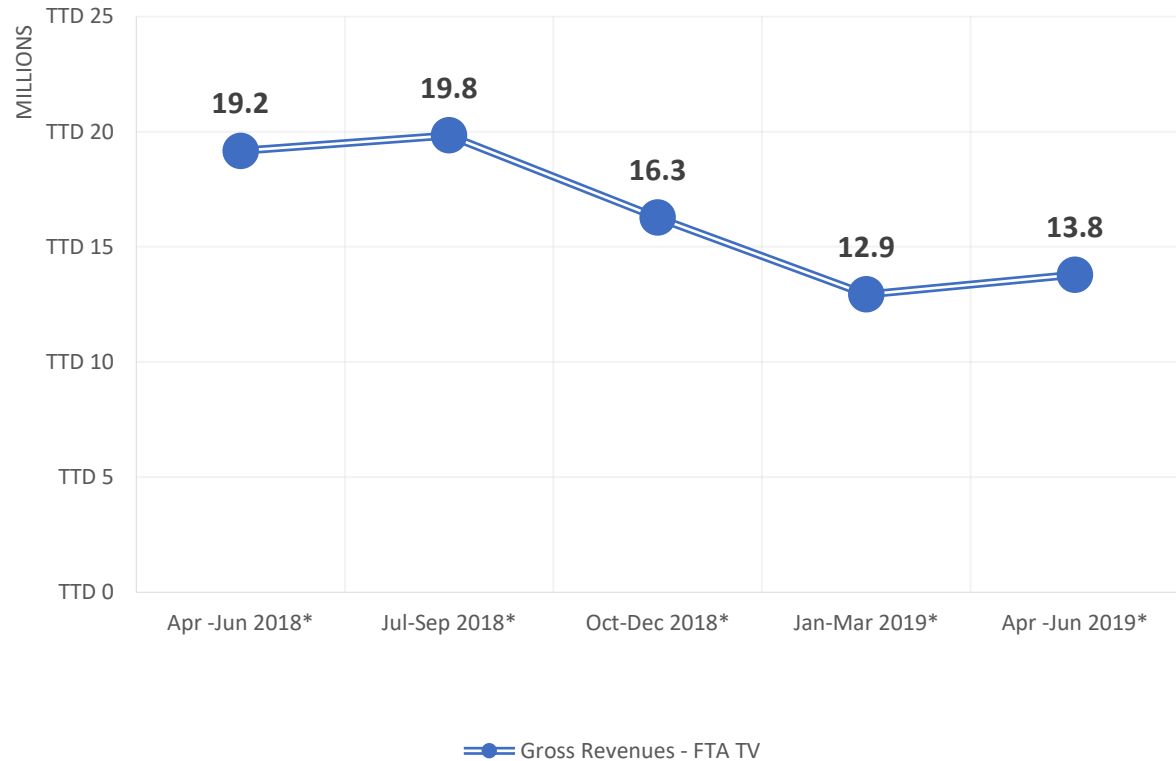
-28.1%



Q-o-Q
PERCENT CHANGE

-6.6%

Gross Revenues from Free to Air TV Services
Q2 2018 to Q2 2019



- **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

3,308



Y-o-Y
PERCENT CHANGE

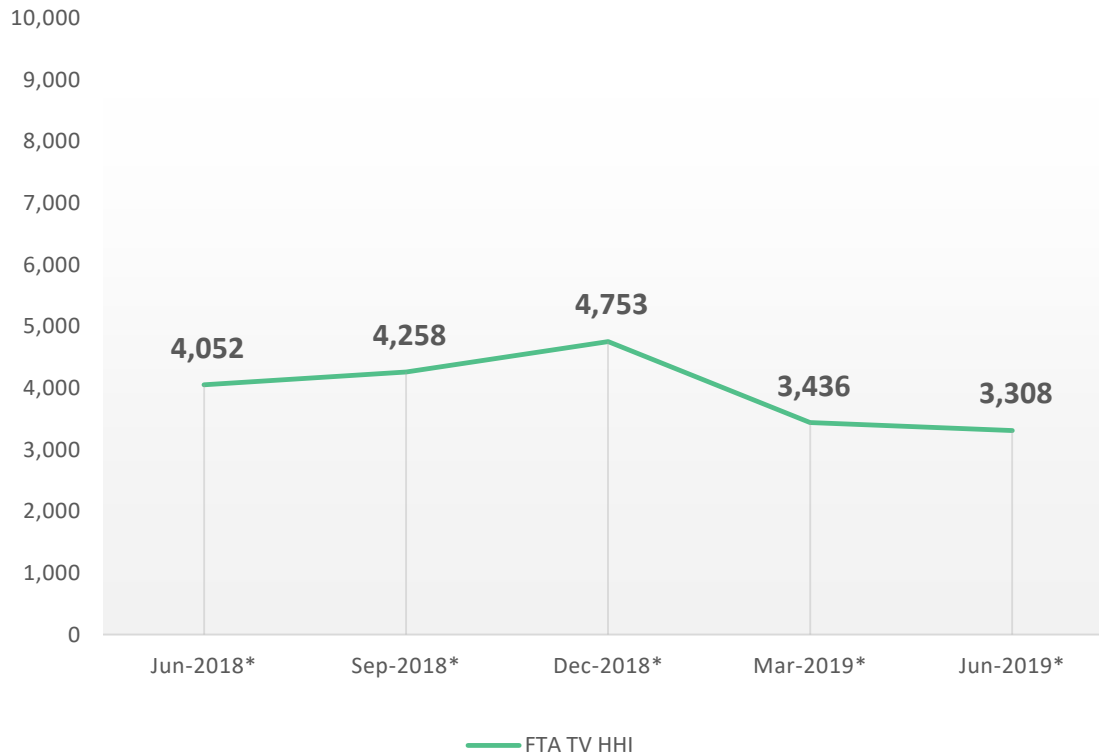
-18.4%



Q-o-Q
PERCENT CHANGE

-3.7%

HHI for Free to Air TV Services
Q2 2018 to Q2 2019



- *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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