



QUARTERLY MARKET UPDATE

July to September 2019

Quarterly Market Update – Q3 2019

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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

338,000



Y-o-Y PERCENT CHANGE

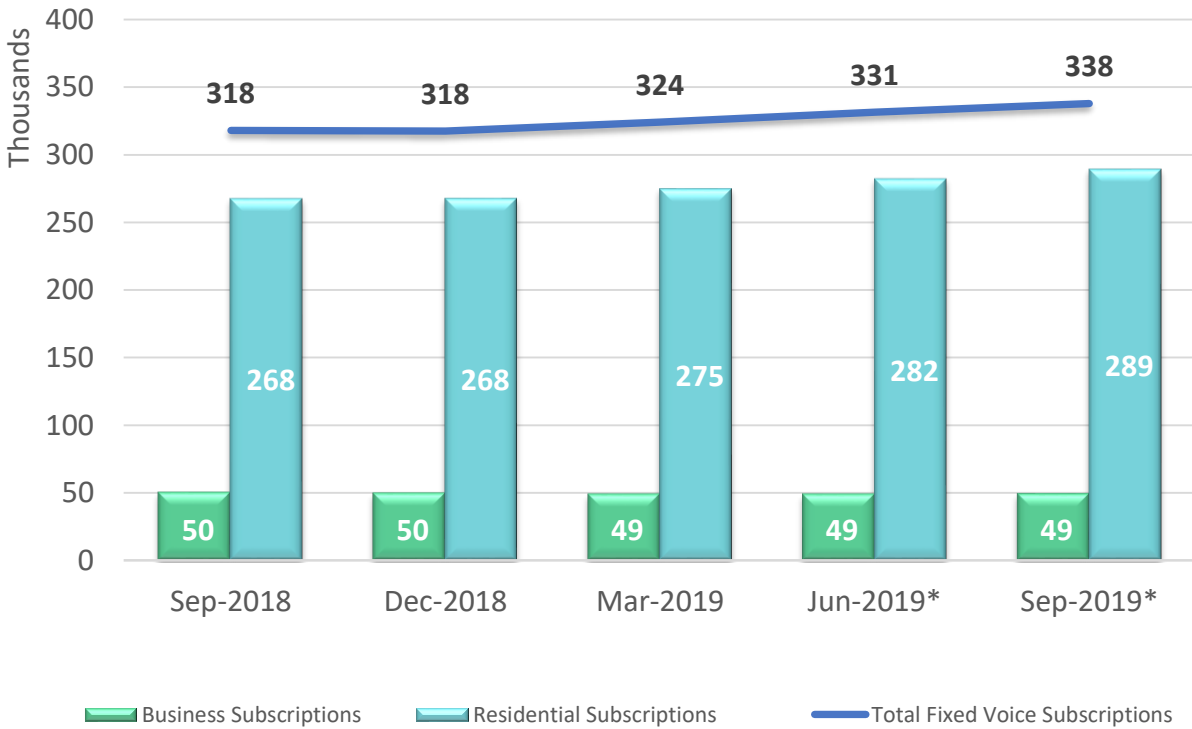
6.3%



Q-o-Q PERCENT CHANGE

2.0%

Number of Fixed Line Subscriptions
Q3 2018 to Q3 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

24.8



Y-o-Y
PERCENT CHANGE

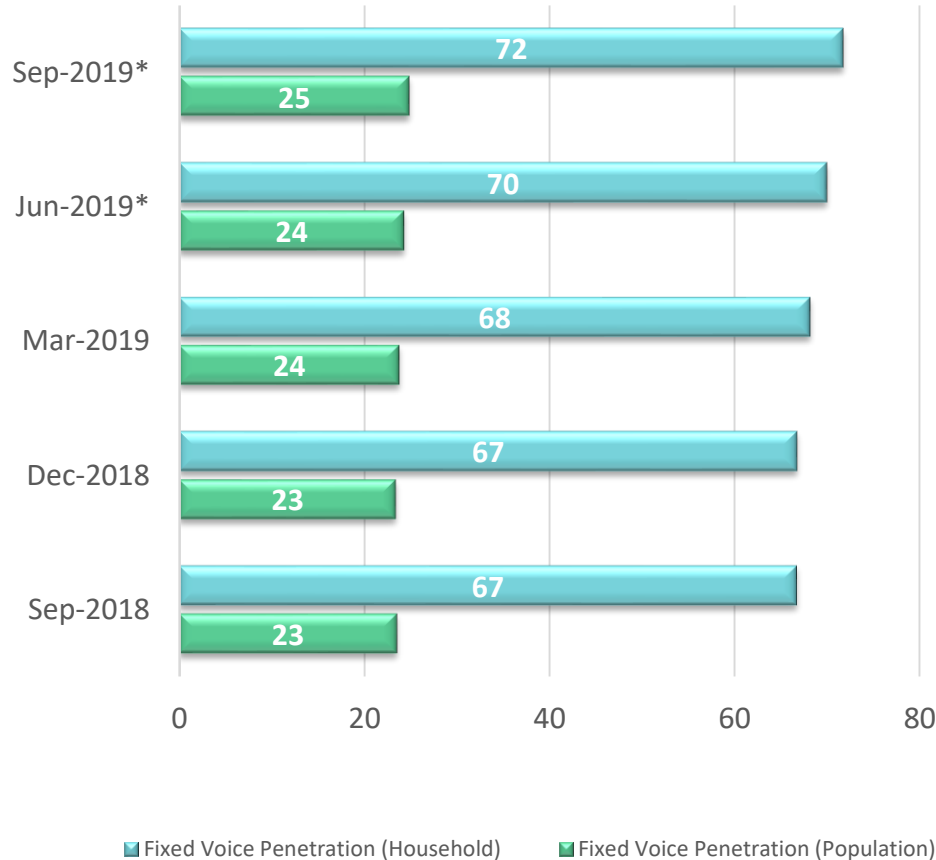
5.6%



Q-o-Q
PERCENT CHANGE

2.2%

Penetration Rate of Fixed Line Subscriptions
Q3 2018 to Q3 2019



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

71.7



Y-o-Y
PERCENT CHANGE

7.5%



Q-o-Q
PERCENT CHANGE

2.5%

**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

\$139.2m



Y-o-Y
PERCENT CHANGE

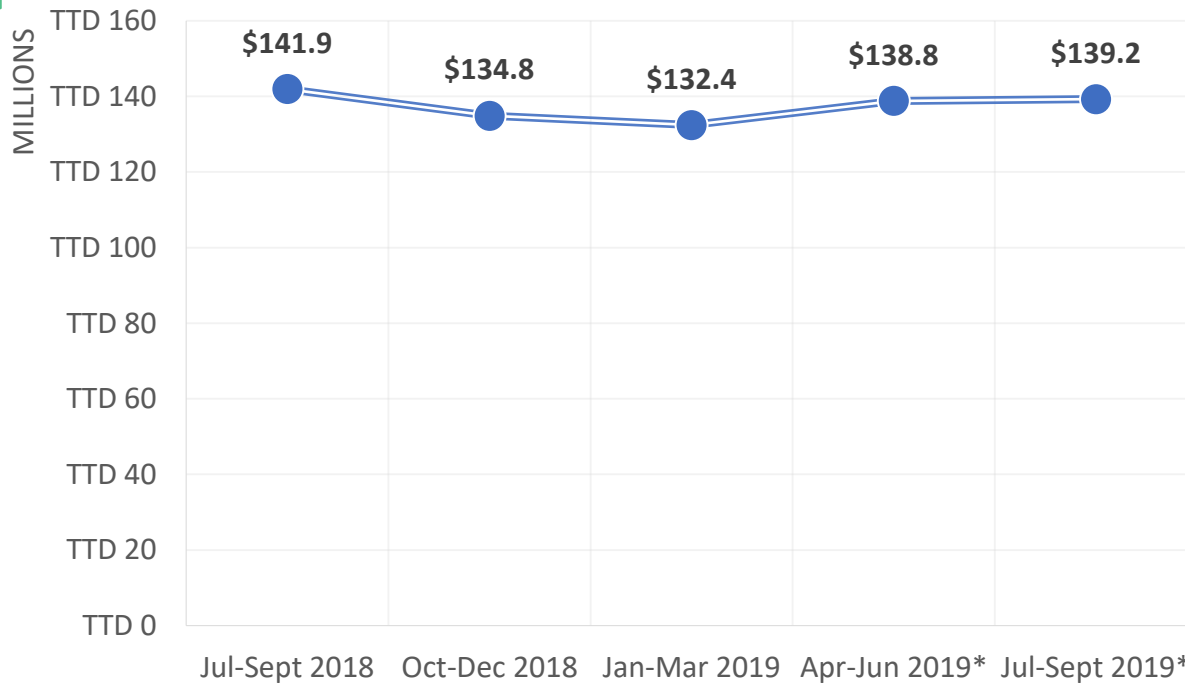
-1.9%



Q-o-Q
PERCENT CHANGE

0.3%

Gross Revenues from Domestic Fixed Voice Services
Q3 2018 to Q3 2019

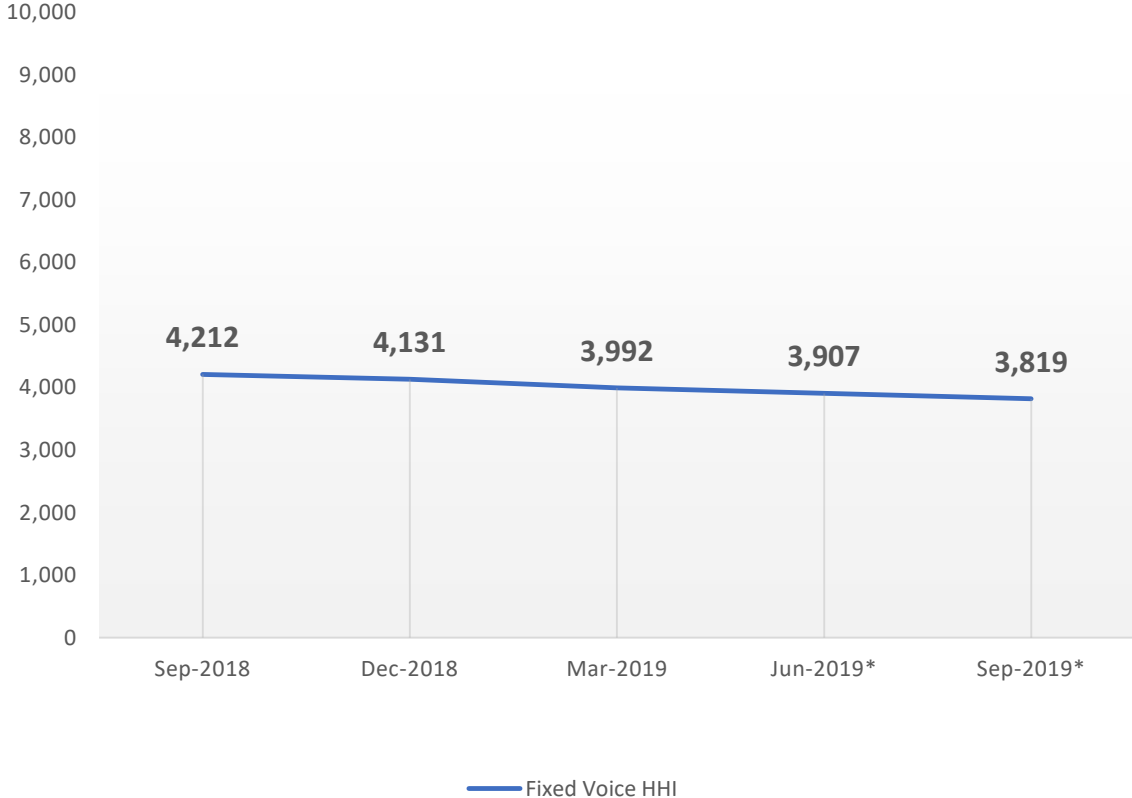


Legend: Gross Revenues from Domestic Fixed Voice Services

***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 HHI

HHI for Domestic Fixed Line
Q3 2018 to Q3 2019



HHI

3,819



Y-o-Y
PERCENT CHANGE

-9.3%



Q-o-Q
PERCENT CHANGE

-0.4%

**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

\$

\$412

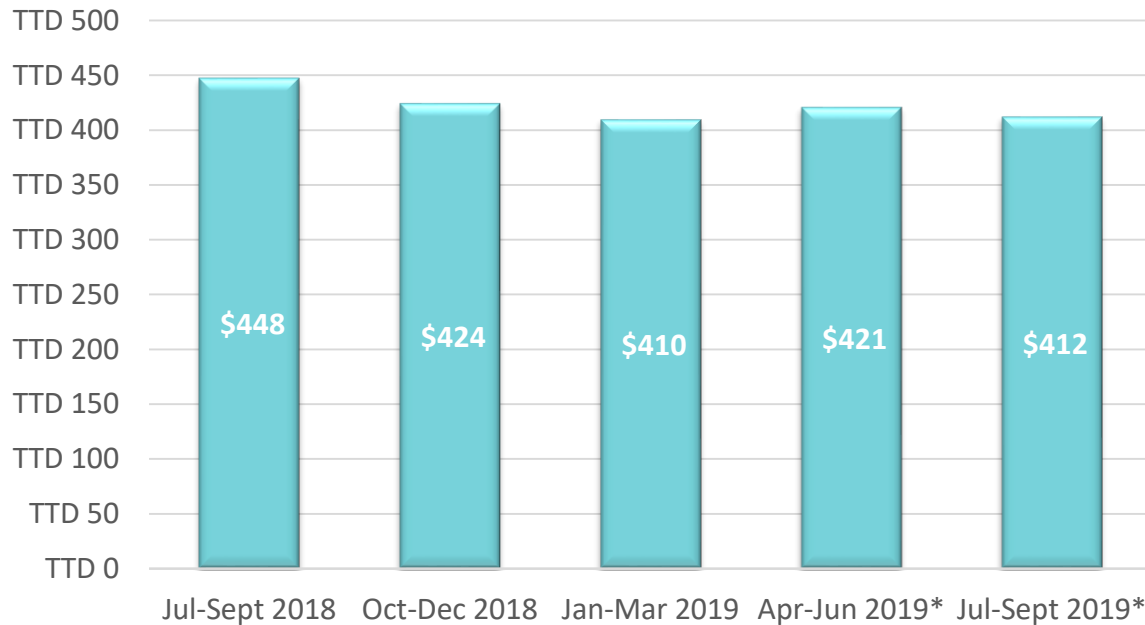
Y-o-Y
PERCENT CHANGE

-7.9%

Q-o-Q
PERCENT CHANGE

-2.0%

ARPU for Domestic Fixed Line
Q3 2018 to Q3 2019



■ ARPU from Domestic Fixed Voice Services

**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

2,160,000



Y-o-Y PERCENT CHANGE

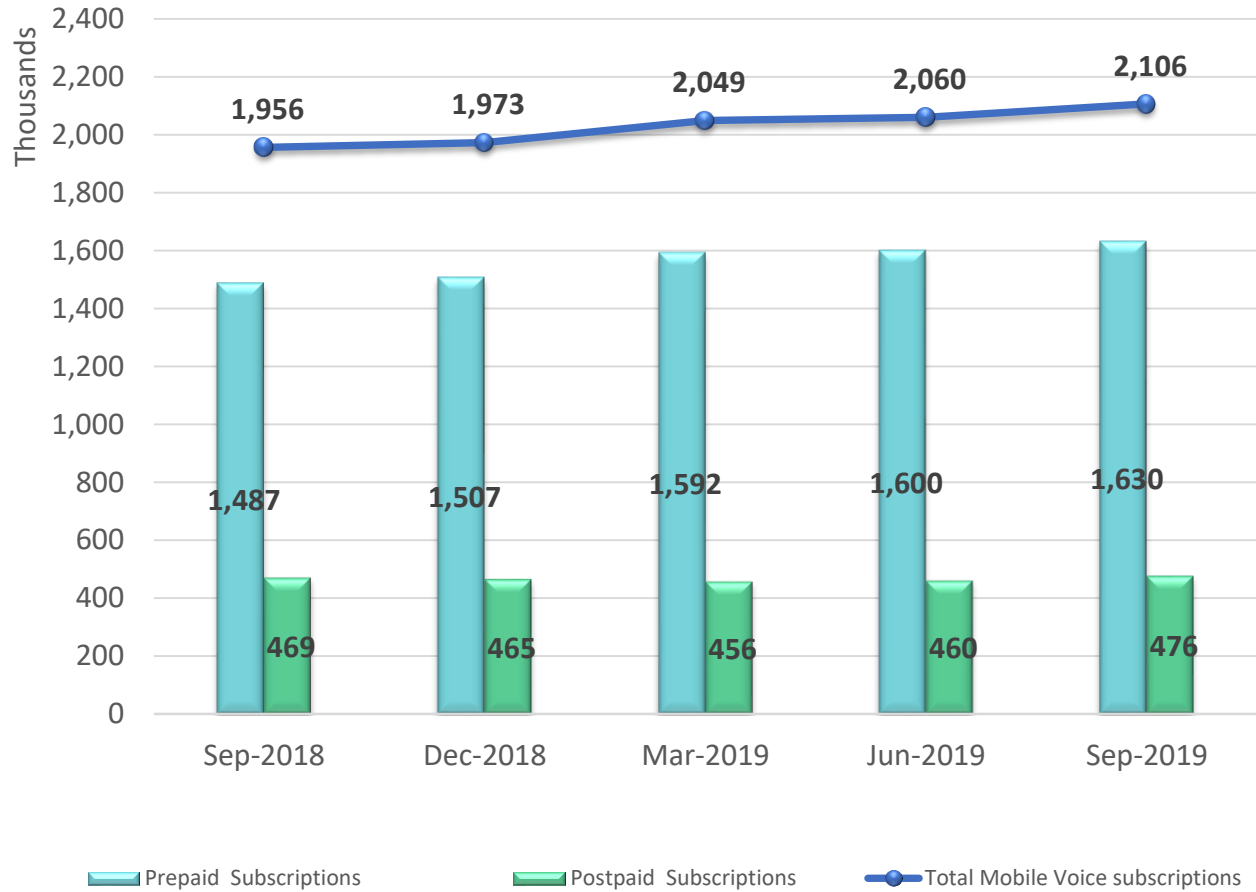
7.7%



Q-o-Q PERCENT CHANGE

2.2%

Number of Mobile Voice Subscriptions
Q3 2018 to Q3 2019



Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

155



Y-o-Y
PERCENT CHANGE

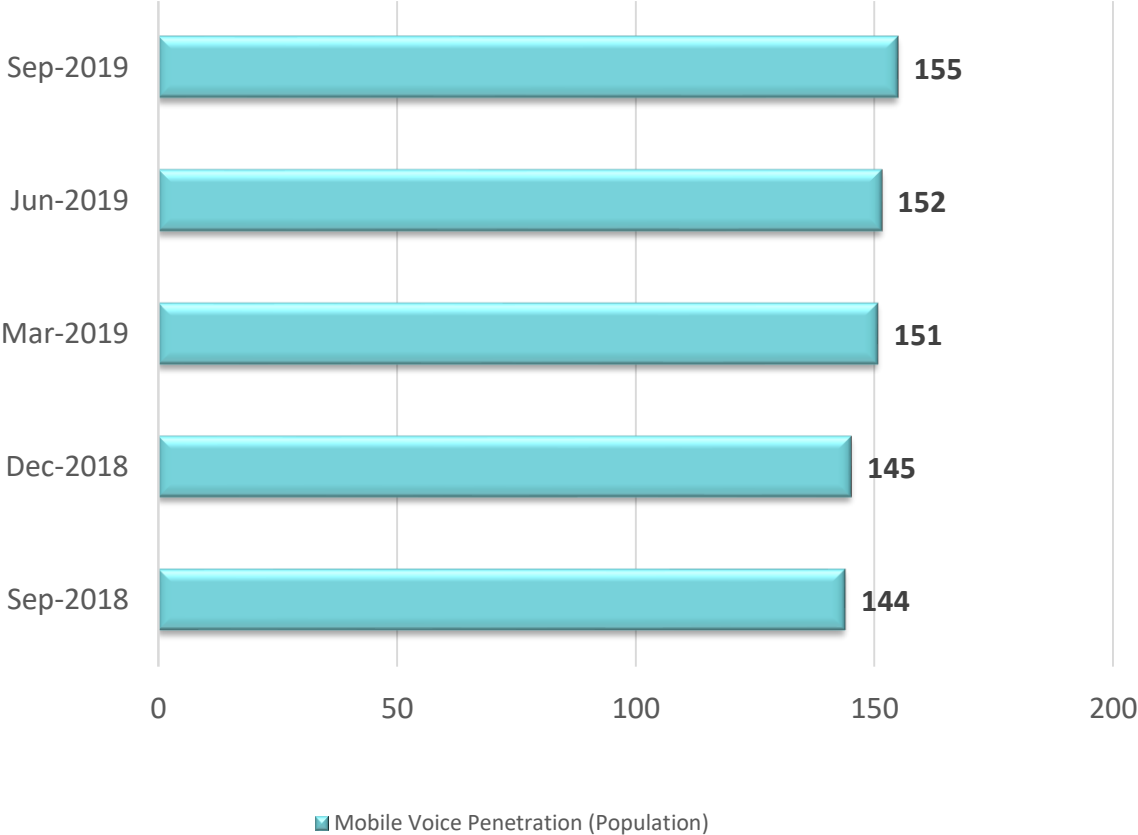
7.7%



Q-o-Q
PERCENT CHANGE

2.2%

Penetration of Mobile Voice Subscriptions
Q3 2018 to Q3 2019



Mobile Services Revenues



GROSS REVENUES

\$484.2m



Y-o-Y
PERCENT CHANGE

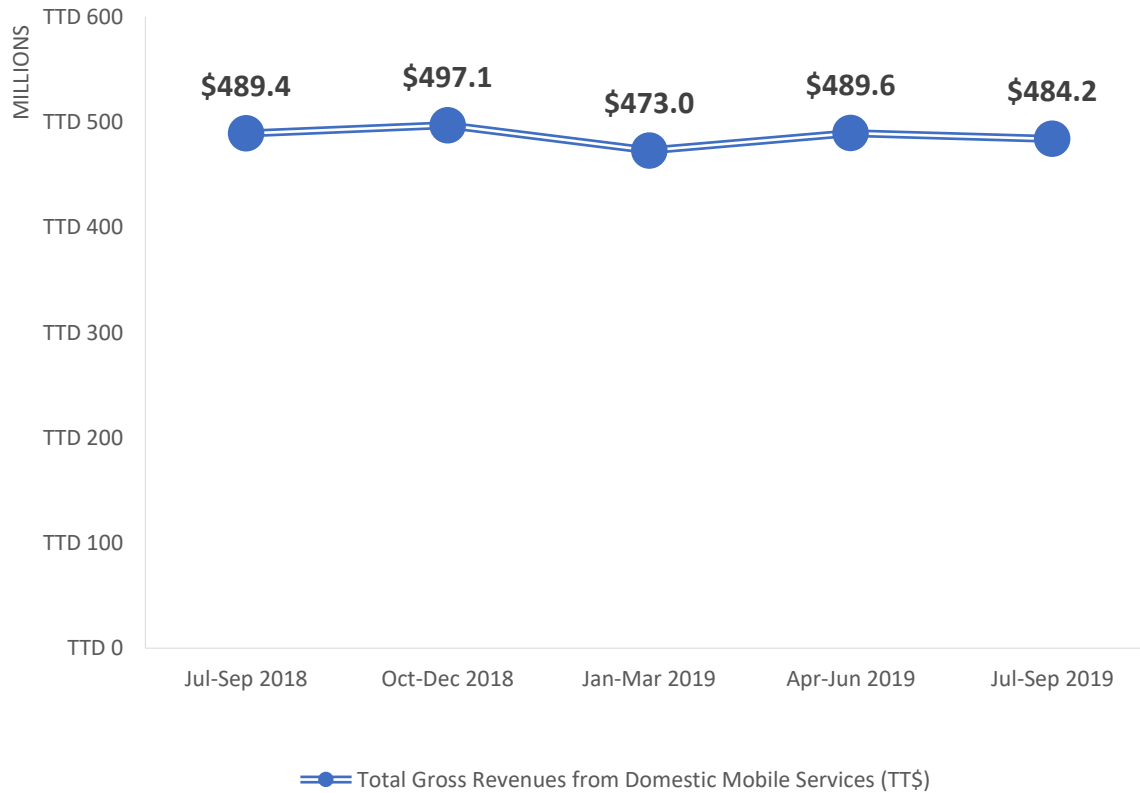
-1.1%



Q-o-Q
PERCENT CHANGE

-1.1%

Total Gross Revenues from Domestic Mobile Services (TT\$)
Q3 2018 to Q3 2019



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,101



Y-o-Y
PERCENT CHANGE

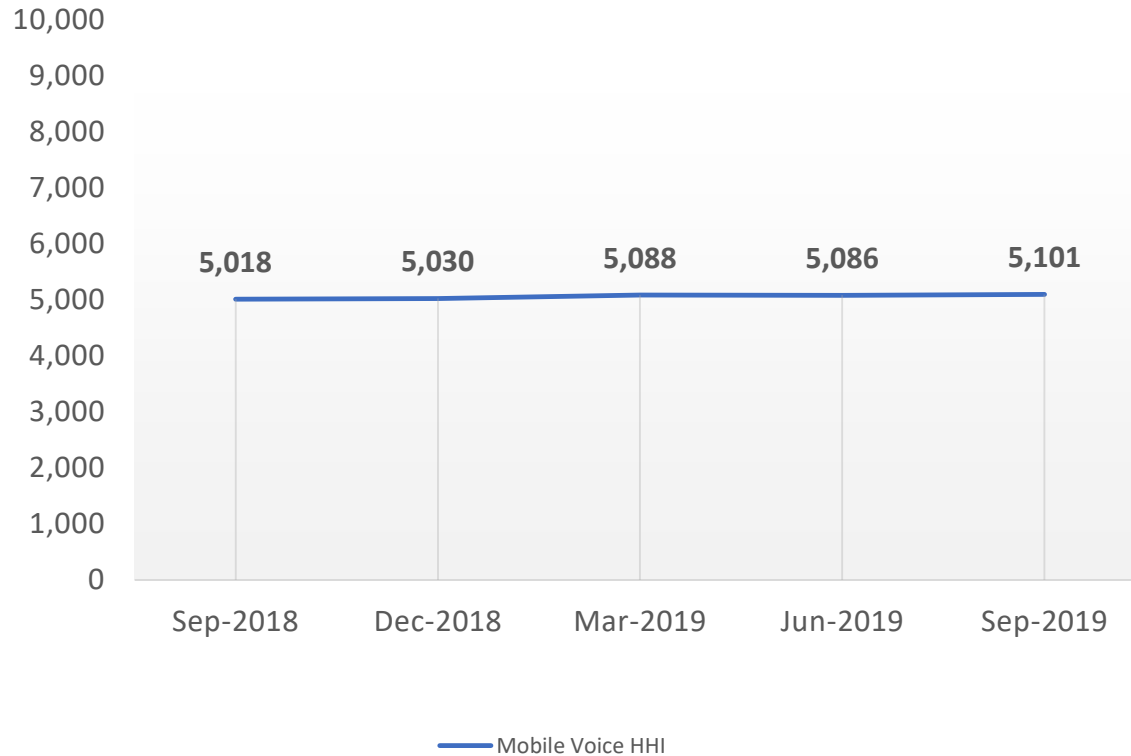
1.7%



Q-o-Q
PERCENT CHANGE

0.3%

HHI for Domestic Mobile Services
Q3 2018 to Q3 2019



Average Revenue Per User Mobile Services



ARPU

\$231



Y-o-Y
PERCENT CHANGE

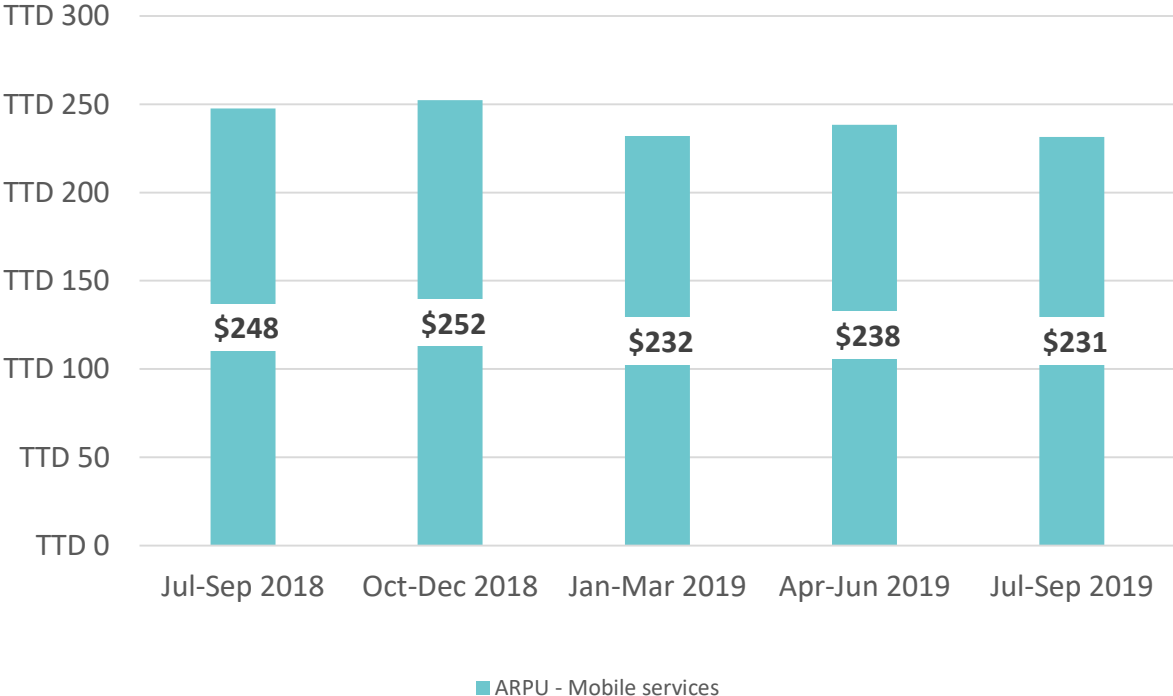
-6.5%



Q-o-Q
PERCENT CHANGE

-2.9%

ARPU for Domestic Mobile Services
Q3 2018 to Q3 2019



Fixed Broadband Subscriptions

TOTAL NUMBER OF SUBSCRIPTIONS

335,400

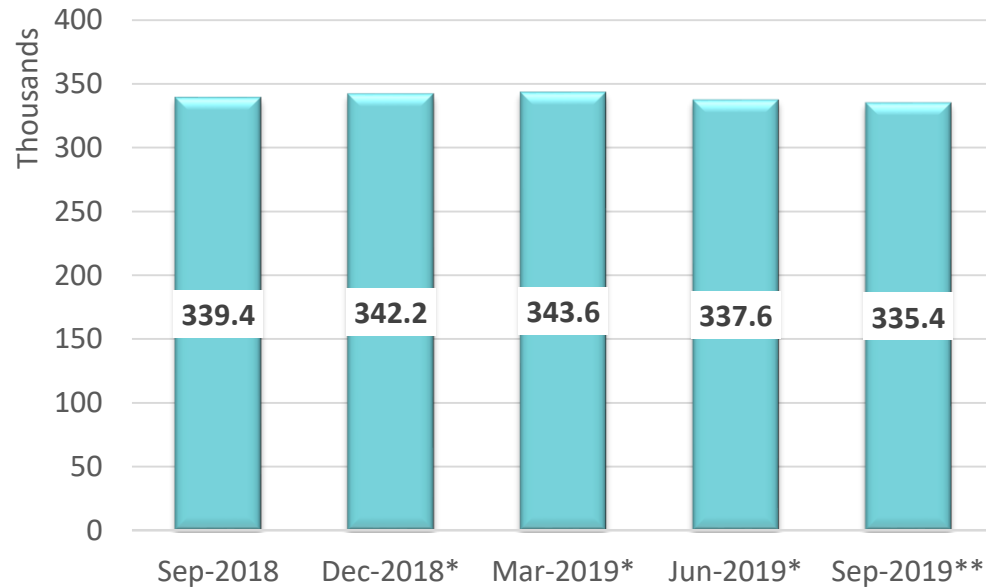
Y-o-Y PERCENT CHANGE

-1.2%

Q-o-Q PERCENT CHANGE

-0.6%

Number of Fixed Broadband Internet Subscriptions
Q3 2018 to Q3 2019



■ Fixed Broadband Internet Subscriptions

**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 and Massy Technologies InfoCom (Trinidad) Limited.*

***Data estimated for the following concessionaire who partially submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago Limited.*

Fixed Internet Penetration



FIXED INTERNET PENETRATION PER 100 INHABITANTS

24.7



Y-o-Y PERCENT CHANGE

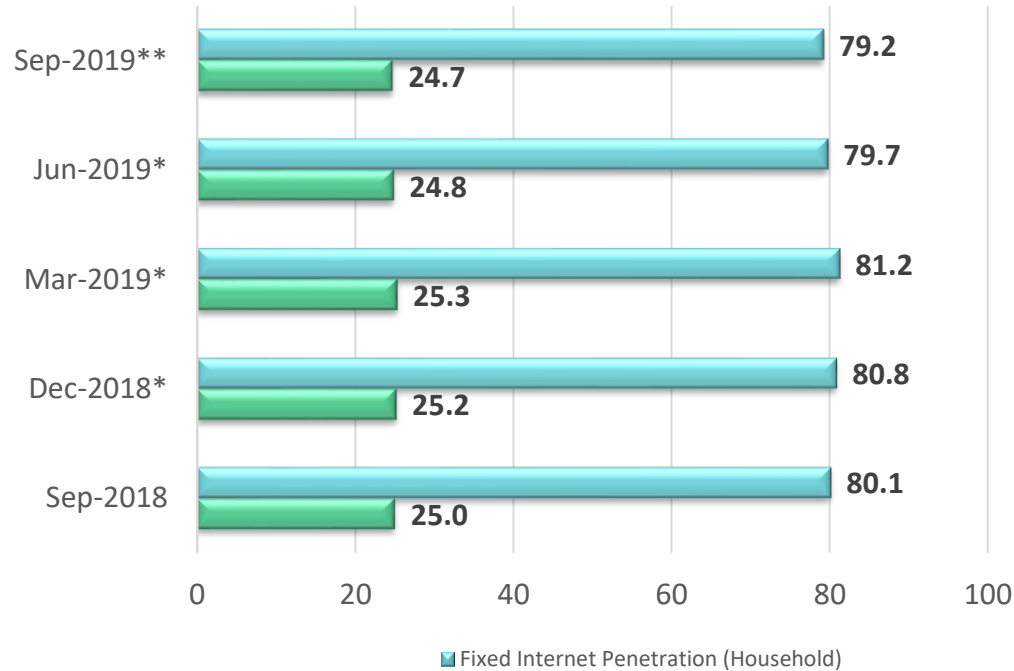
-1.2%



Q-o-Q PERCENT CHANGE

-0.6%

Penetration for Fixed Internet Subscriptions from Q3 2018 to Q3 2019



FIXED INTERNET PENETRATION PER 100 HOUSEHOLDS

79.2



Y-O-Y PERCENT CHANGE

-1.2%



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 and Massy Technologies InfoCom (Trinidad) Limited.*

***Data estimated for the following concessionaire who partially submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago Limited.*

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

49.7

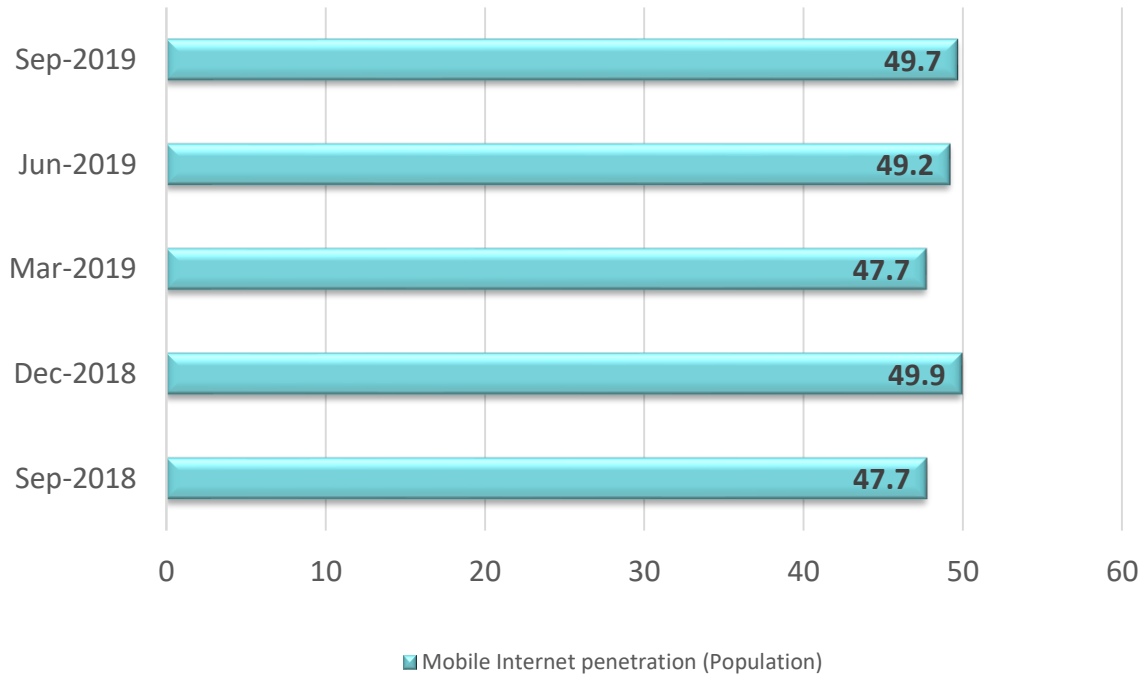
Y-o-Y
PERCENT CHANGE

4.1%

Q-o-Q
PERCENT CHANGE

1.0%

Penetration for Mobile Internet Subscriptions
Q3 2018 to Q3 2019



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

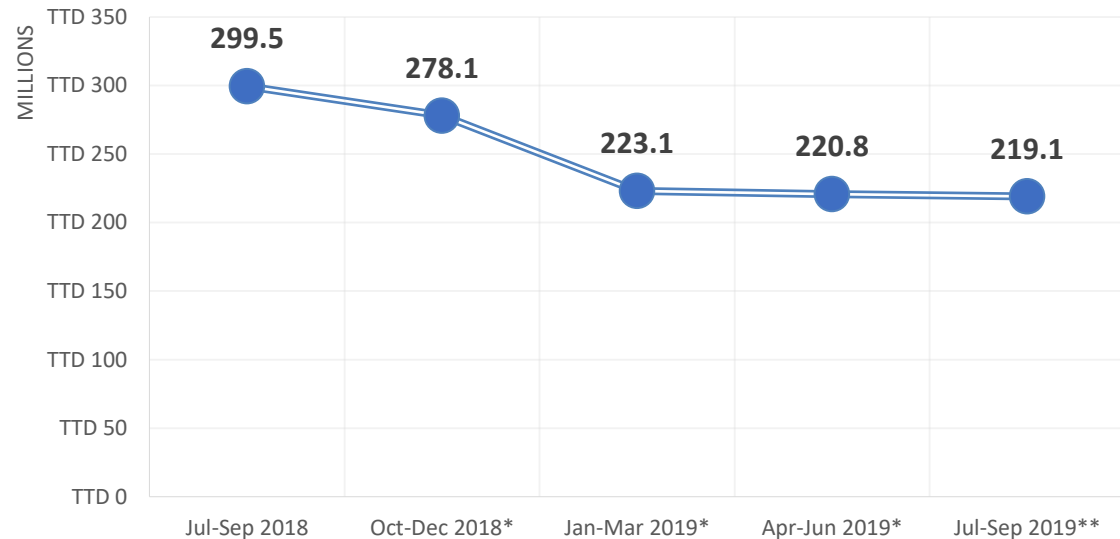
Fixed Internet Revenues



GROSS REVENUES

\$219.1m

Gross Revenues from Fixed Internet Services
Q3 2018 to Q3 2019



Y-o-Y
PERCENT CHANGE

-26.8%

— Gross Revenue from Fixed Internet...

**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 and Massy Technologies InfoCom (Trinidad) Limited.*

***Data estimated for the following concessionaire who partially submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago Limited.*



Q-o-Q
PERCENT CHANGE

-0.8%

Fixed Internet HHI



HHI

3,048



Y-o-Y
PERCENT CHANGE

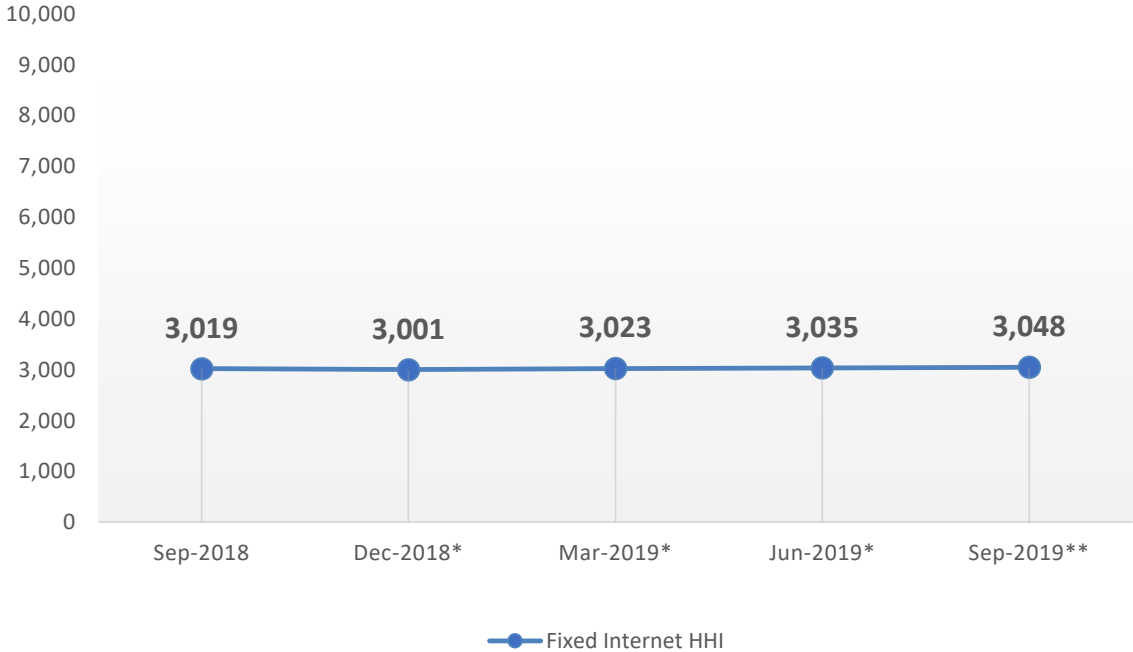
1.0%



Q-o-Q
PERCENT CHANGE

0.4%

HHI for Fixed Internet Services
Q3 2018 to Q3 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 and Massy Technologies InfoCom (Trinidad) Limited.

**Data estimated for the following concessionaire who partially submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago Limited.

Fixed Internet Average Revenue Per User

ARPU

\$

\$665

Y-o-Y

PERCENT CHANGE

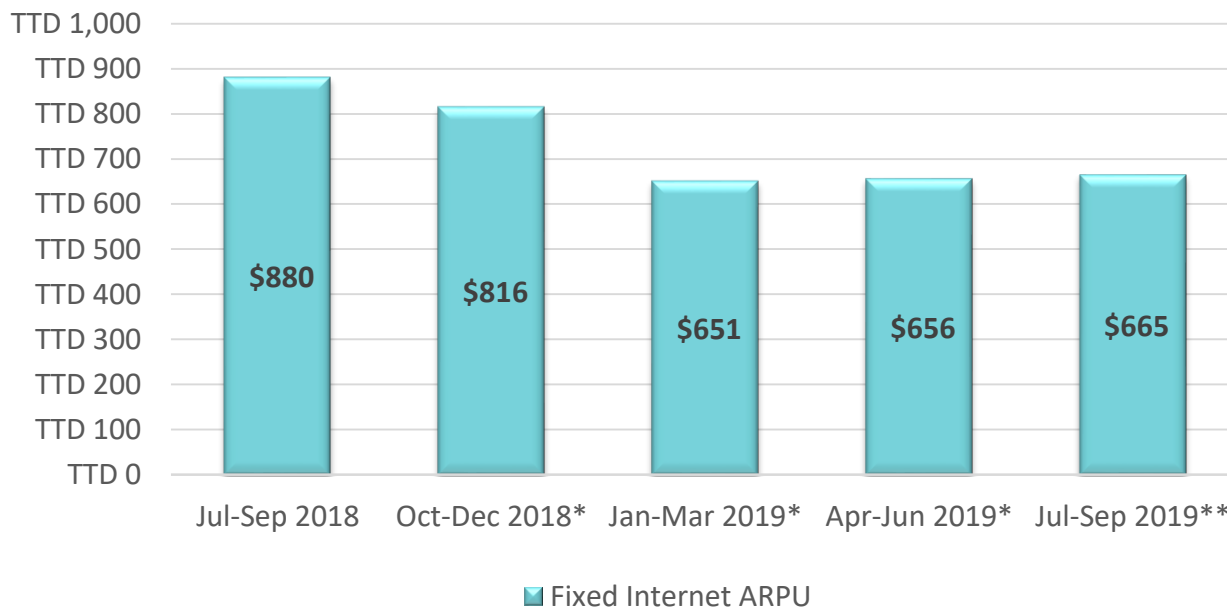
-24.5%

Q-o-Q

PERCENT CHANGE

1.3%

ARPU for Fixed Internet Services
Q3 2018 to Q3 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 and Massy Technologies InfoCom (Trinidad) Limited.

**Data estimated for the following concessionaire who partially submitted data at the date of publication: Telecommunications Services of Trinidad and Tobago Limited.

Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

249,000



Y-o-Y PERCENT CHANGE

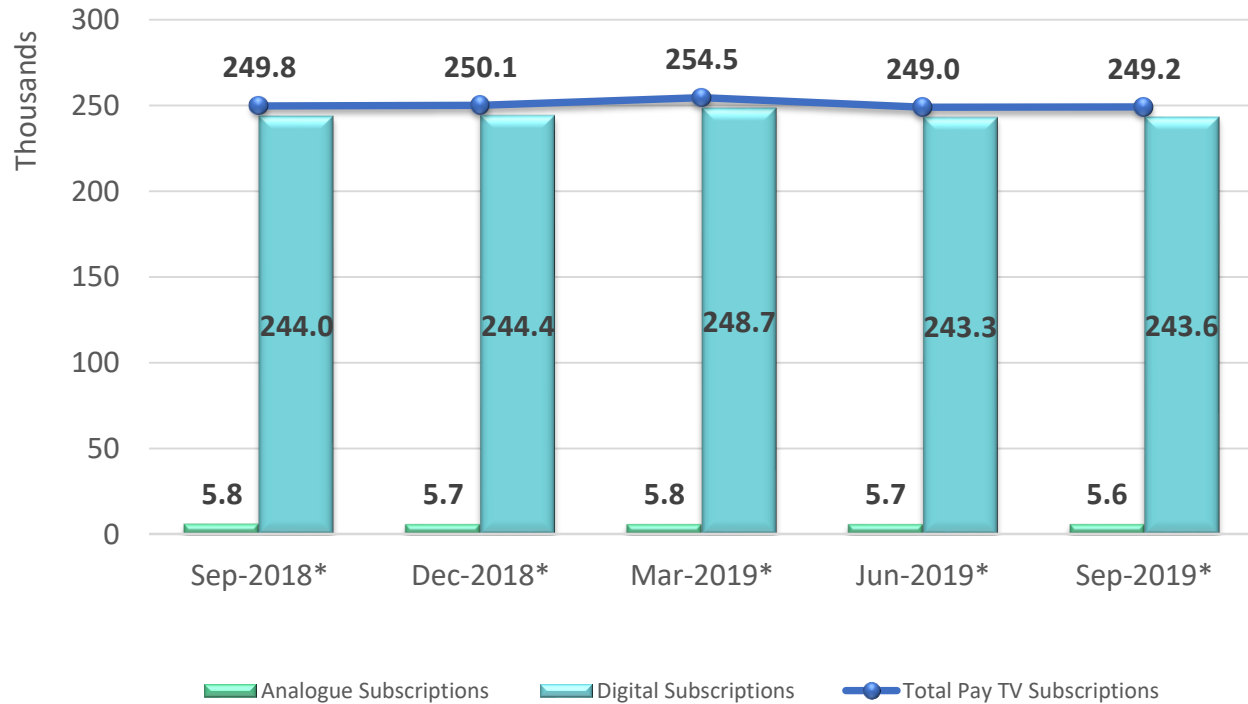
-0.3%



Q-o-Q PERCENT CHANGE

0.1%

Number of Pay TV Subscriptions
Q3 2018 to Q3 2019



**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

18.2



Y-o-Y
PERCENT CHANGE

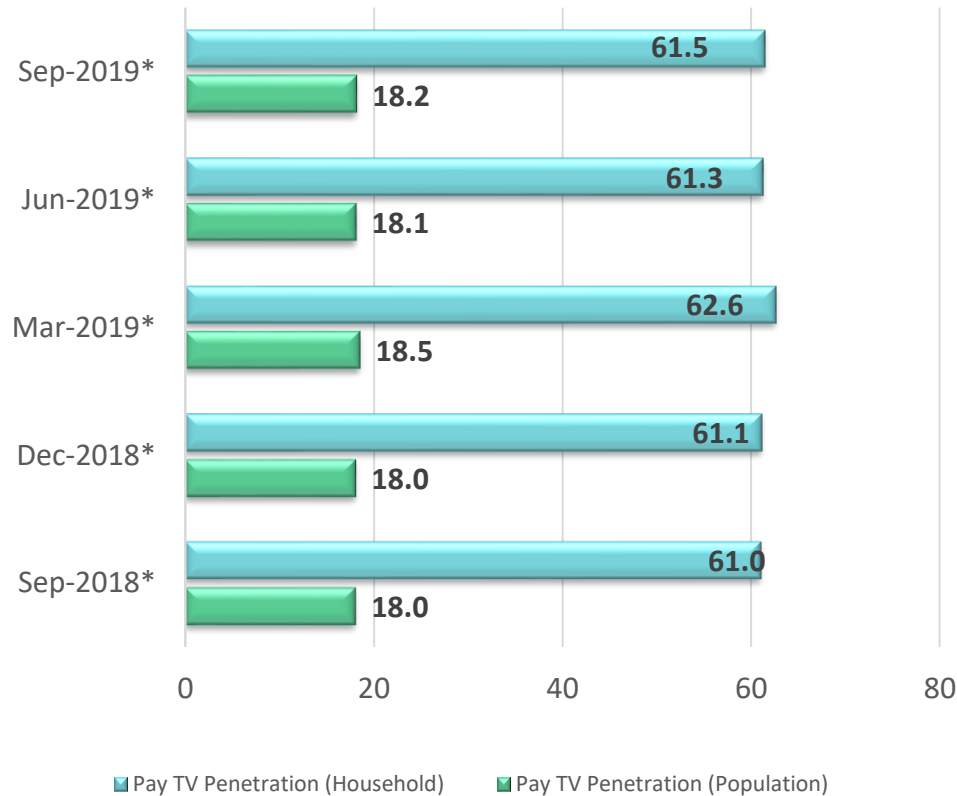
0.7%



Q-o-Q
PERCENT CHANGE

0.3%

Penetration Rates of Pay TV Subscriptions
Q3 2018 to Q3 2019



PAY TV
PENETRATION PER
100 HOUSEHOLDS

61.5



Y-O-Y
PERCENT CHANGE

0.7%



Q-o-Q
PERCENT CHANGE

0.3%

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

Pay TV Revenues



GROSS REVENUES

\$184.1m



Y-o-Y
PERCENT CHANGE

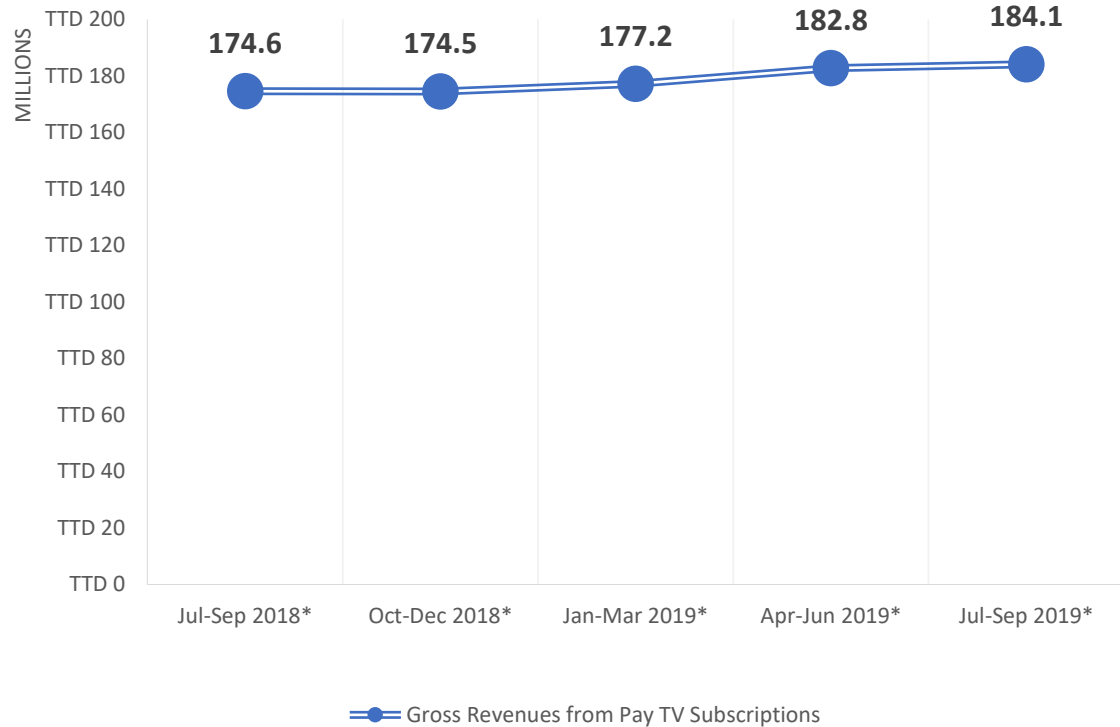
5.4%



Q-o-Q
PERCENT CHANGE

0.7%

Gross Revenues from Pay TV Services
Q3 2018 to Q3 2019



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



HHI

2,997



Y-o-Y
PERCENT CHANGE

-1.4%

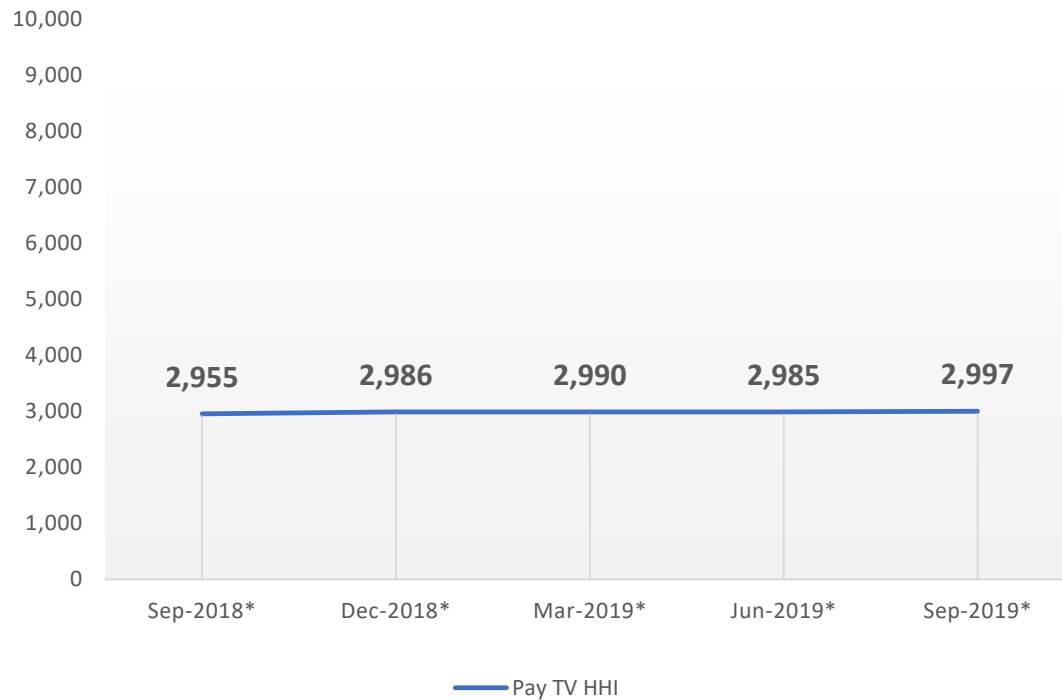


Q-o-Q
PERCENT CHANGE

0.4.%

Pay TV HHI

HHI for Pay TV Services
Q3 2018 to Q3 2019



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

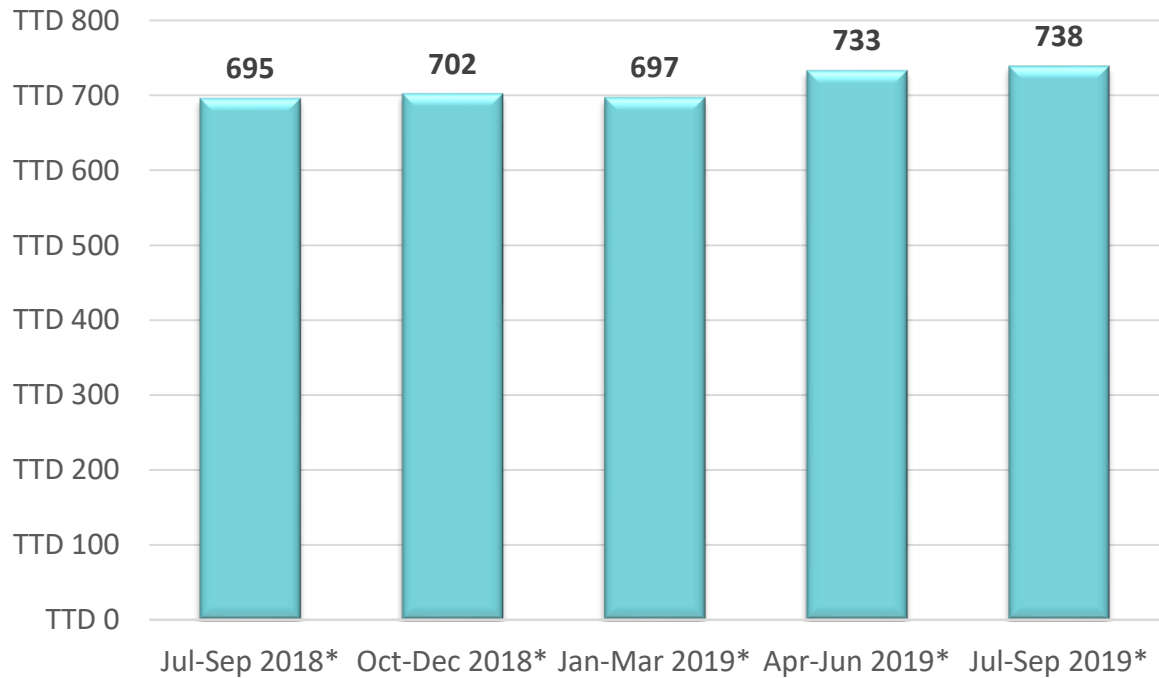
Pay TV

Average Revenue Per User

ARPU

\$
\$738

ARPU for Pay TV
Q3 2018 to Q3 2019



■ Pay TV ARPU

Y-o-Y
PERCENT CHANGE

-5.8%

Q-o-Q
PERCENT CHANGE

0.8%

**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

\$32.9m

↑

Y-o-Y
PERCENT CHANGE

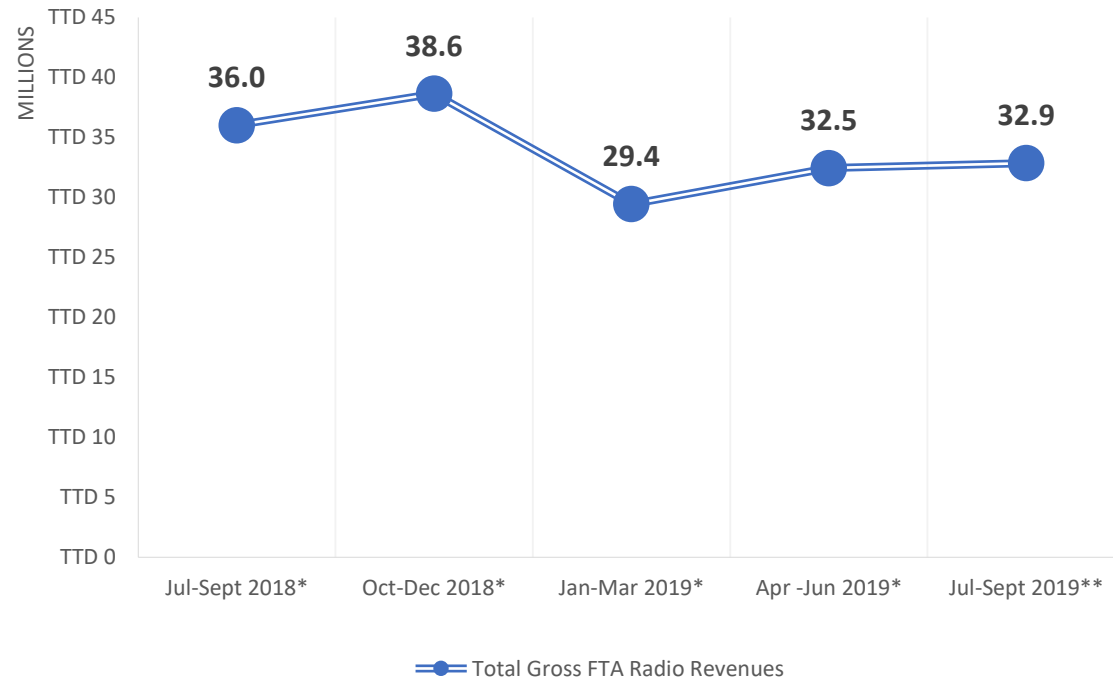
-9.0%

↑

Q-o-Q
PERCENT CHANGE

1.3%

Gross Revenues from Free to Air Radio Services -
Q3 2018 to Q3 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

466



Y-o-Y
PERCENT CHANGE

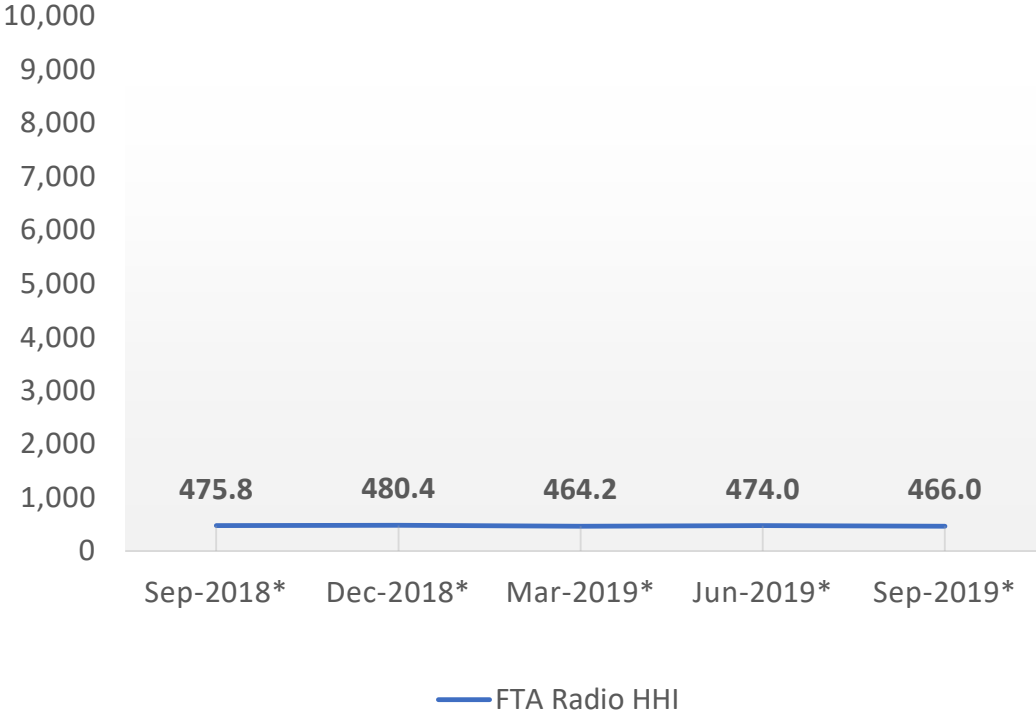
-2.0%



Q-o-Q
PERCENT CHANGE

-1.7%

HHI for Free to Air Radio Services
Q3 2018 to Q3 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.*

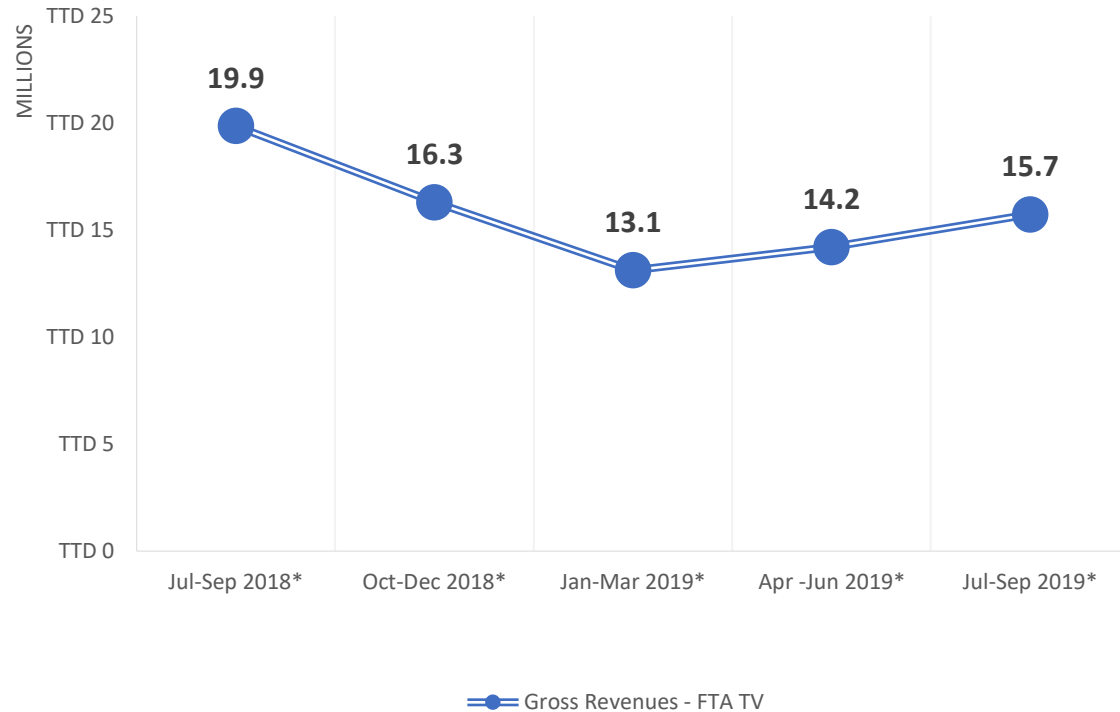
Free-to-Air TV Revenues

\$ GROSS REVENUES
\$15.7m

Y-o-Y
PERCENT CHANGE
-20.8%

Q-o-Q
PERCENT CHANGE
10.7%

Gross Revenues from Free to Air TV Services
Q3 2018 to Q3 2019



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

Free-to-Air TV HHI



HHI

4,649



Y-o-Y
PERCENT CHANGE

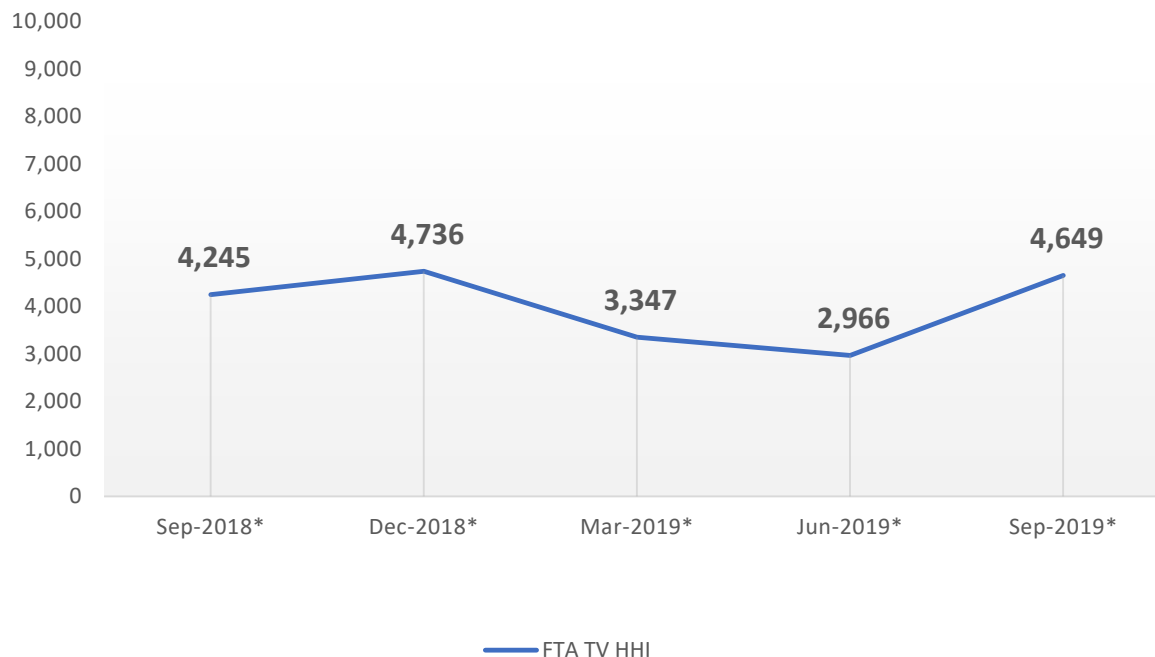
9.5%



Q-o-Q
PERCENT CHANGE

56.7%

HHI for Free to Air TV Services
Q3 2018 to Q3 2019



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



QUARTERLY MARKET UPDATE

April to June 2019