



# QUARTERLY MARKET UPDATE

October to December 2019

## Quarterly Market Update – Q4 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

343,000



Y-o-Y PERCENT CHANGE

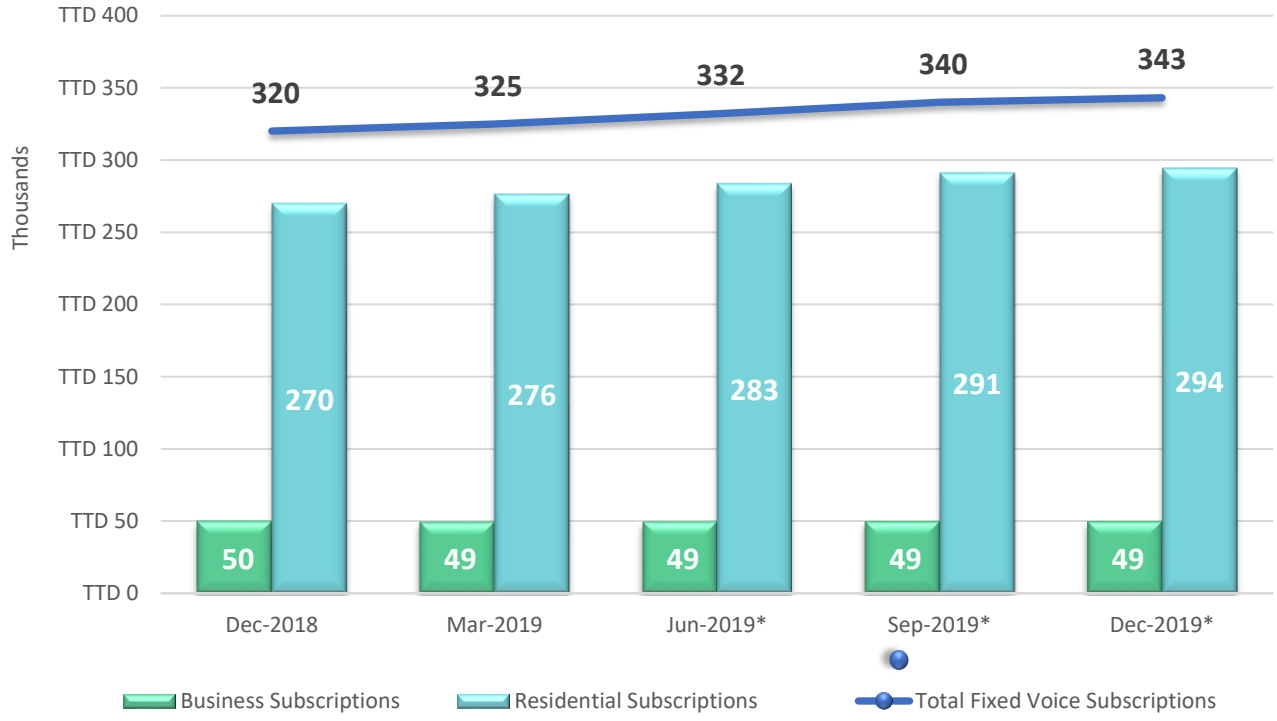
7.6%



Q-o-Q PERCENT CHANGE

1.0%

Number of Fixed Line Subscriptions  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Lisa Communications Dec-2019, Telecommunications Services of Trinidad & Tobago (TSTT) Limited Jun –Dec 2019.*

# Fixed Voice Penetration



FIXED VOICE  
PENETRATION PER  
100 INHABITANTS

25



Y-o-Y  
PERCENT CHANGE

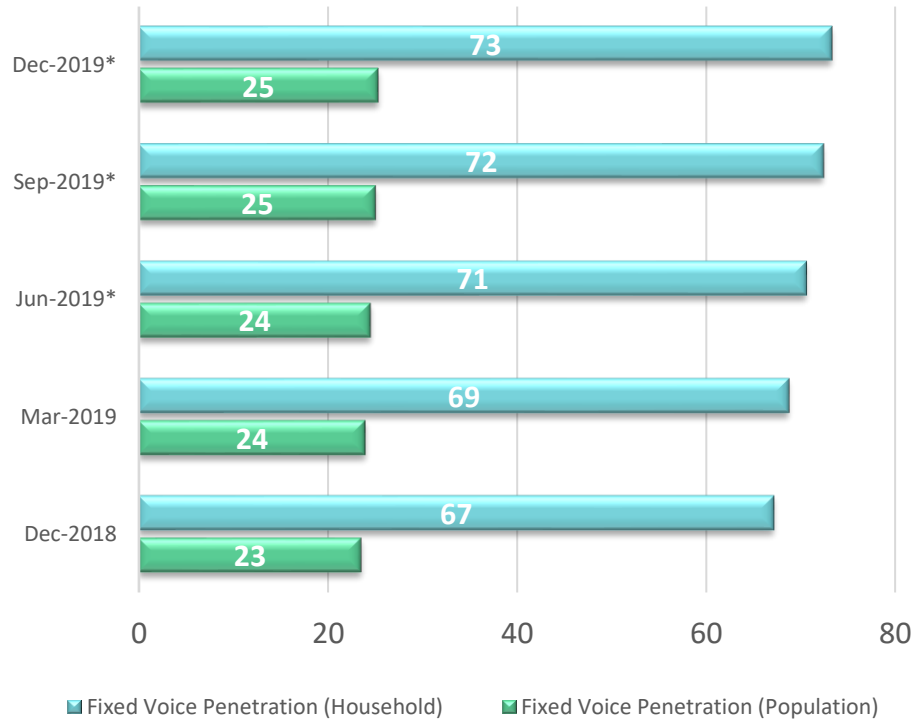
7.6%



Q-o-Q  
PERCENT CHANGE

1.0%

Penetration Rate of Fixed Line Subscriptions  
Q4 2018 to Q4 2019



FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS

73



Y-o-Y  
PERCENT CHANGE

9.1%



Q-o-Q  
PERCENT CHANGE

1.2%

*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Lisa Communications Dec-2019, Telecommunications Services of Trinidad & Tobago (TSTT) Limited Jun –Dec 2019.*

# Fixed Voice Revenues



GROSS REVENUES

\$139.0m



Y-o-Y  
PERCENT CHANGE

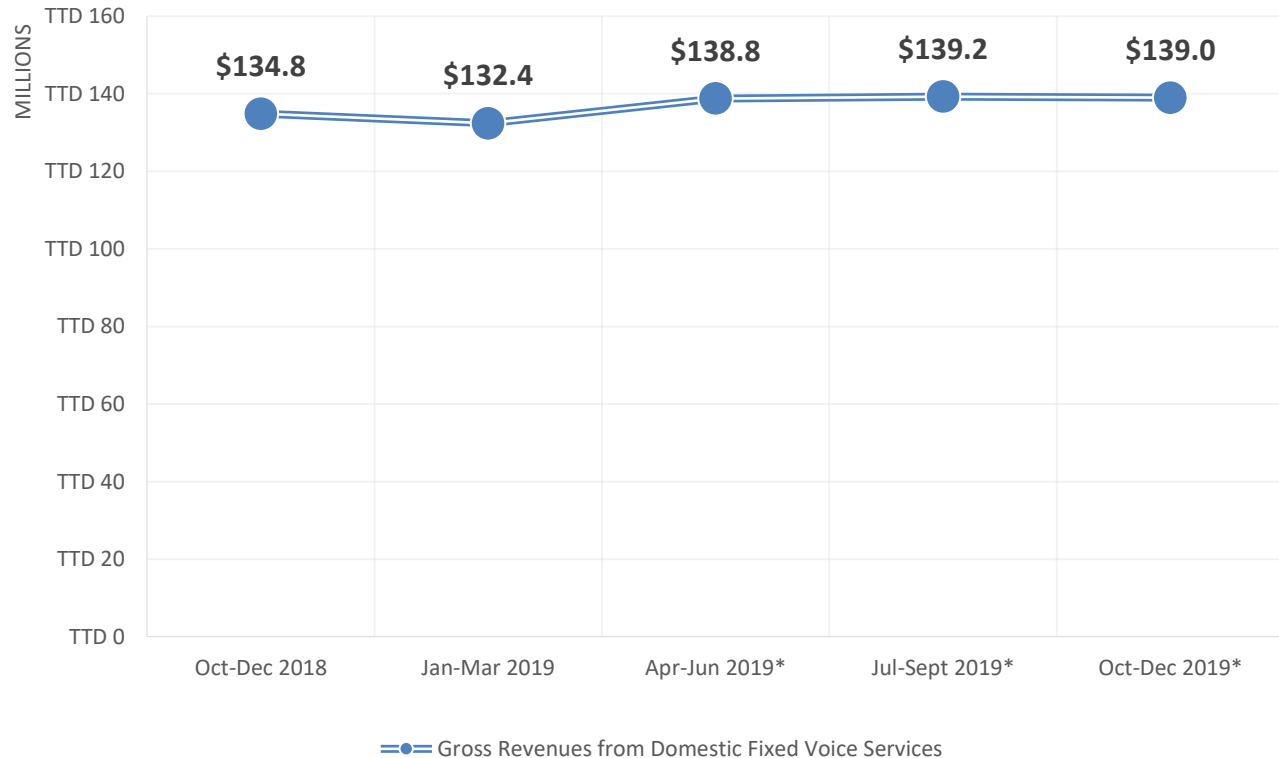
3.0%



Q-o-Q  
PERCENT CHANGE

-0.2%

Gross Revenues from Domestic Fixed Voice Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Lisa Communications Dec-2019, Telecommunications Services of Trinidad & Tobago (TSTT) Limited Jun –Dec 2019.*

# Fixed Voice HHI



HHI

3,770



Y-o-Y  
PERCENT CHANGE

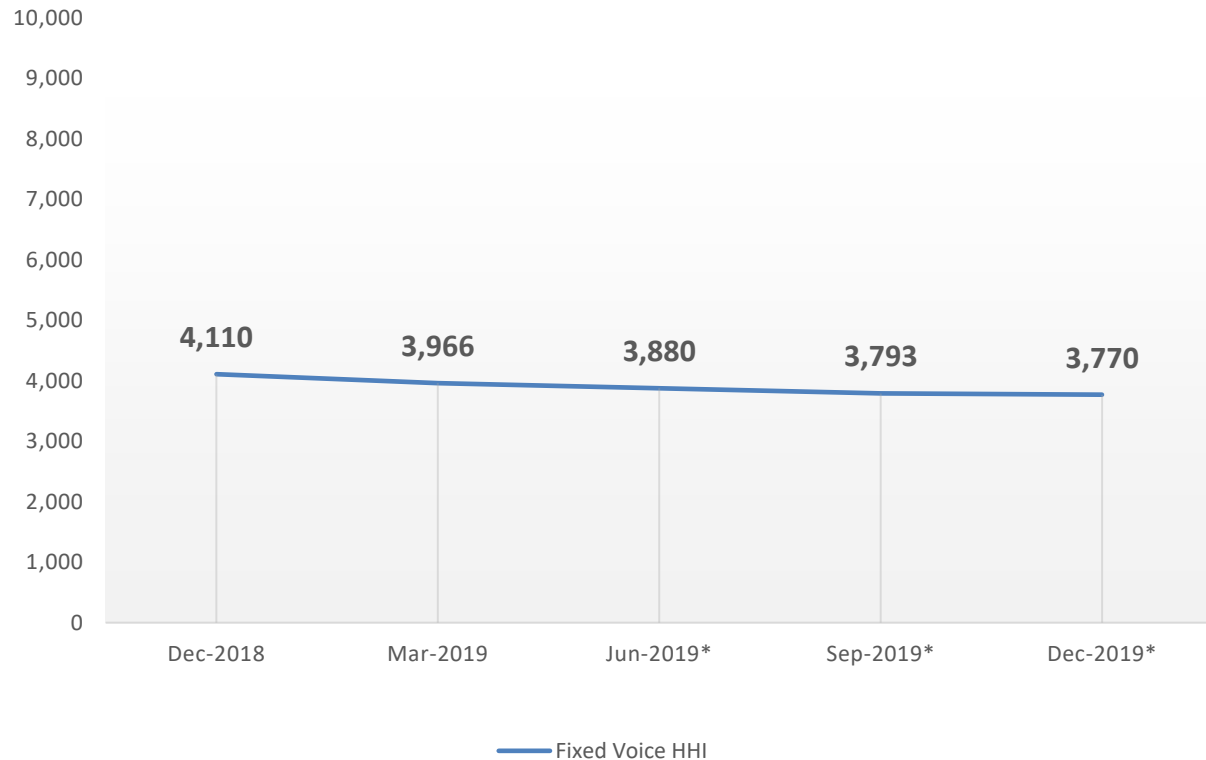
-8.0%



Q-o-Q  
PERCENT CHANGE

-0.6%

HHI for Domestic Fixed Line  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Lisa Communications Dec-2019, Telecommunications Services of Trinidad & Tobago (TSTT) Limited Jun –Dec 2019.*



# Fixed Voice Average Revenue Per User

ARPU



\$406

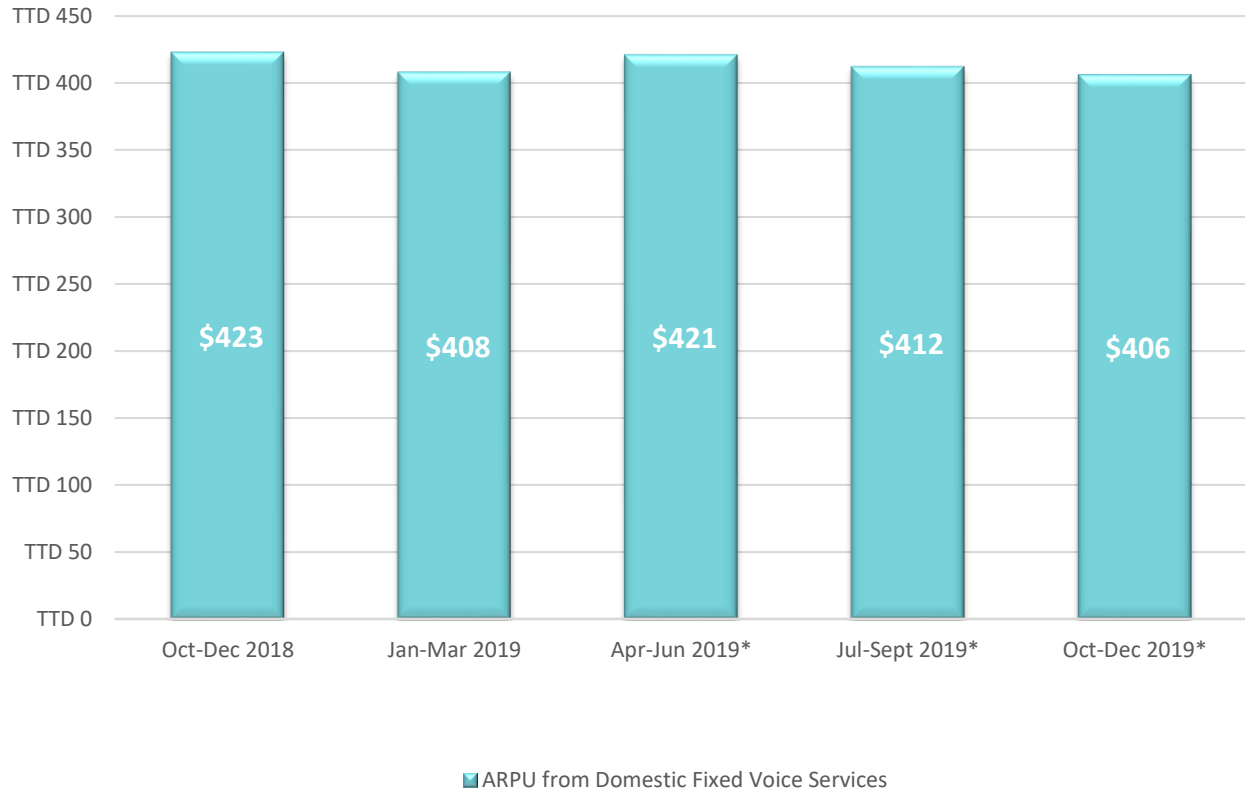
Y-o-Y  
PERCENT CHANGE

-4.0%

Q-o-Q  
PERCENT CHANGE

-1.5%

ARPU for Domestic Fixed Line  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Lisa Communications Dec-2019, Telecommunications Services of Trinidad & Tobago (TSTT) Limited Jun –Dec 2019.*

# Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,164,000



Y-o-Y PERCENT CHANGE

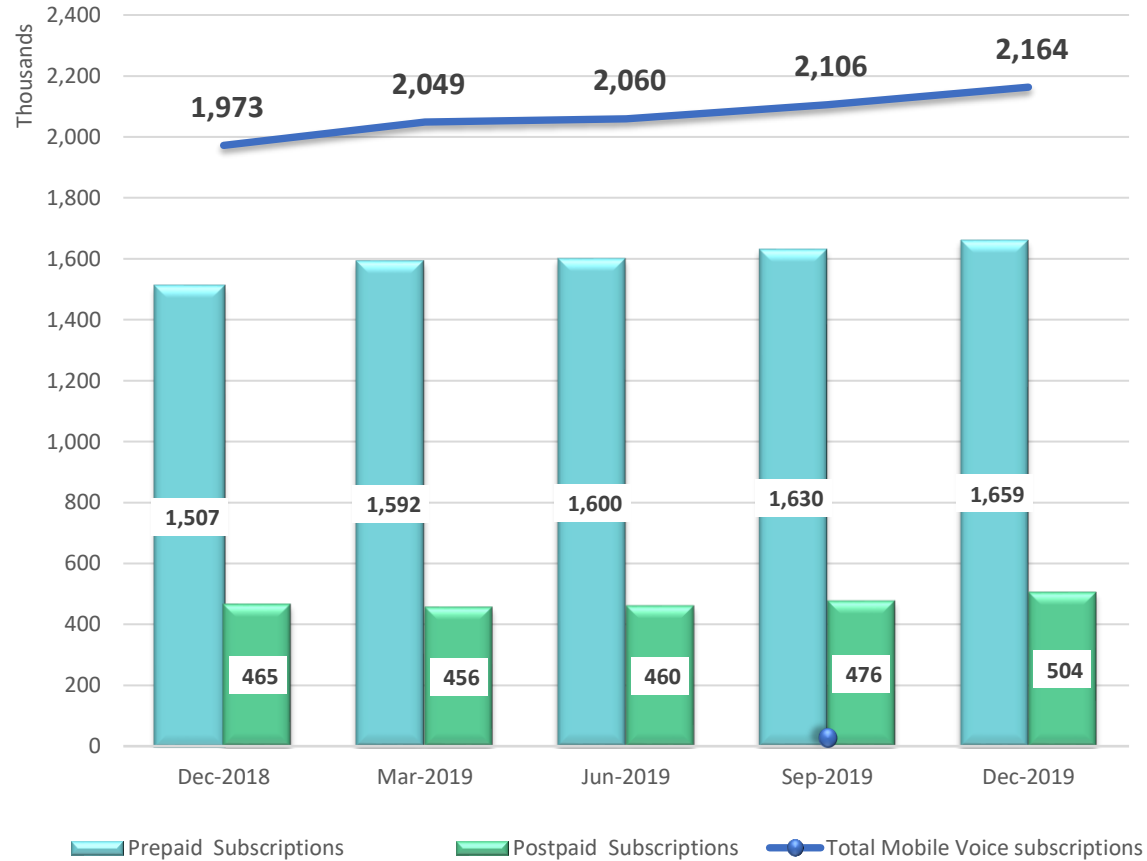
9.7%



Q-o-Q PERCENT CHANGE

2.7%

Number of Mobile Voice Subscriptions  
Q4 2018 to Q4 2019



# Mobile Voice Penetration



MOBILE VOICE  
PENETRATION PER  
100 INHABITANTS

159



Y-o-Y  
PERCENT CHANGE

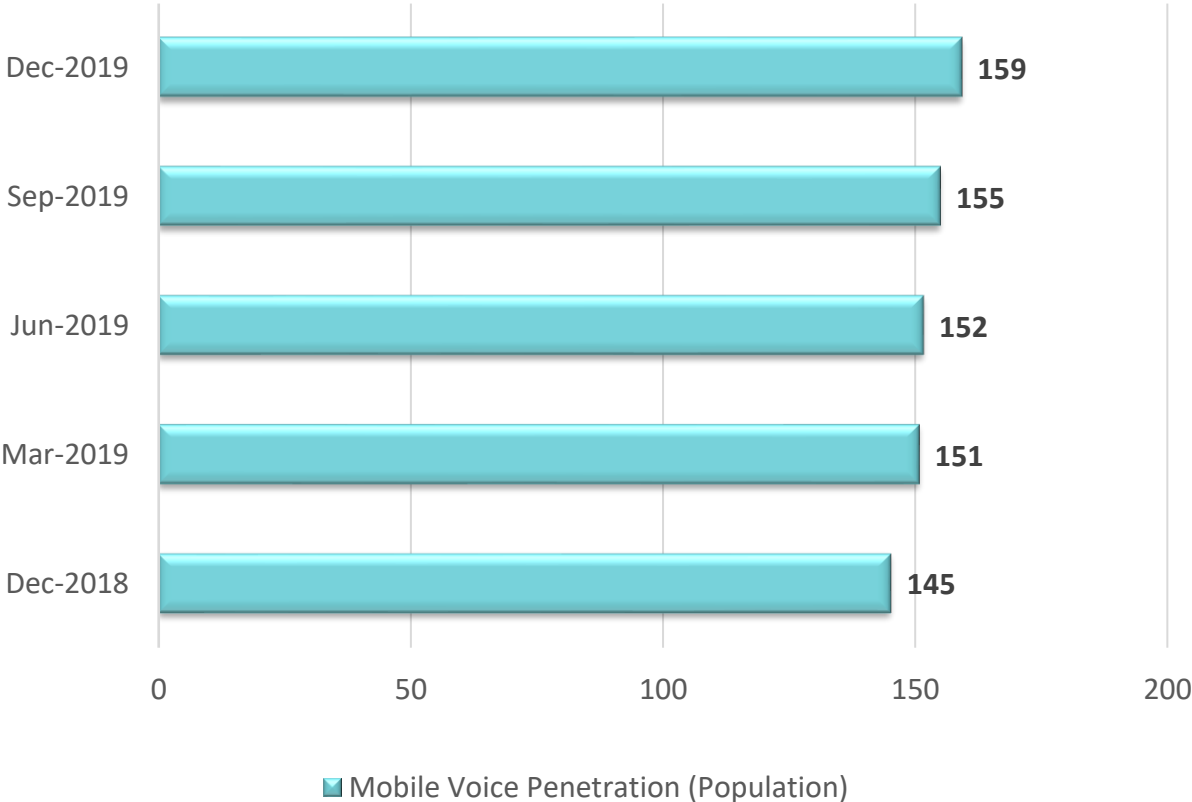
9.7%



Q-o-Q  
PERCENT CHANGE

2.7%

Penetration of Mobile Voice Subscriptions  
Q4 2018 to Q4 2019



# Mobile Services Revenues

**\$** GROSS REVENUES  
**\$494.9m**

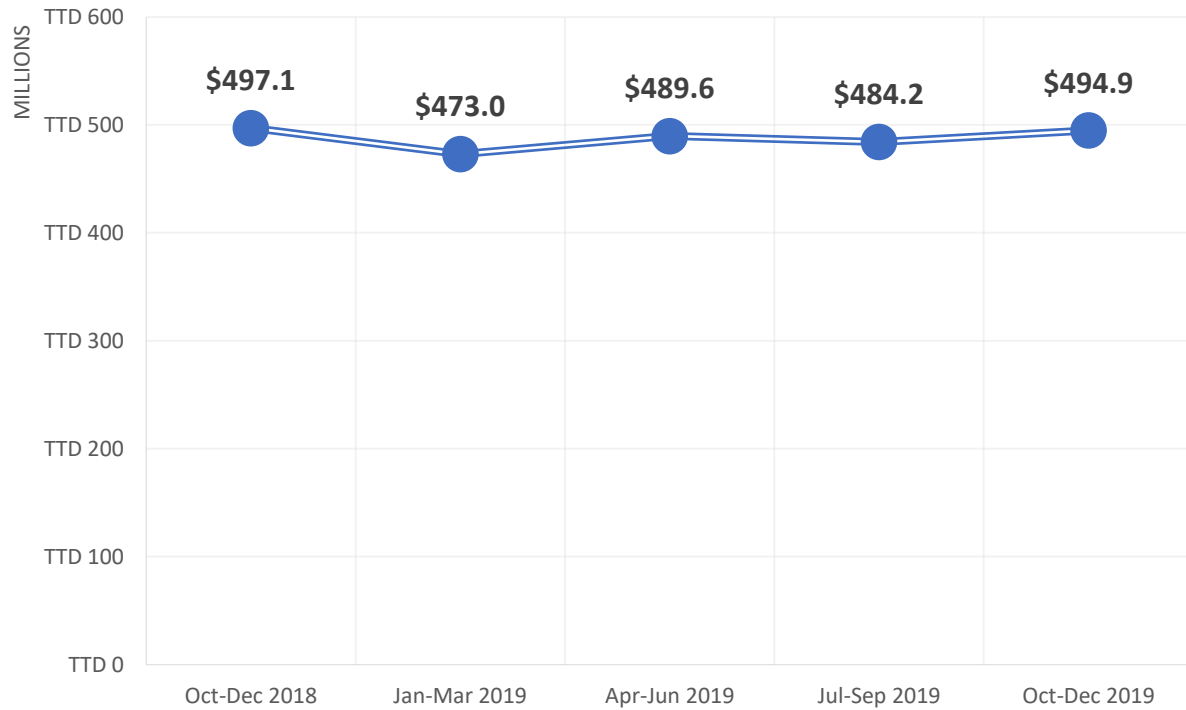
**Y-o-Y**  
**PERCENT CHANGE**

**-0.4%**

**Q-o-Q**  
**PERCENT CHANGE**

**2.2%**

Total Gross Revenues from Domestic Mobile Services (TT\$)  
Q4 2018 to Q4 2019



—●— Total Gross Revenues from Domestic Mobile Services (TT\$)

*Includes revenues from Mobile voice and Internet services.*

# Mobile Voice HHI



HHI

5,119



Y-o-Y  
PERCENT CHANGE

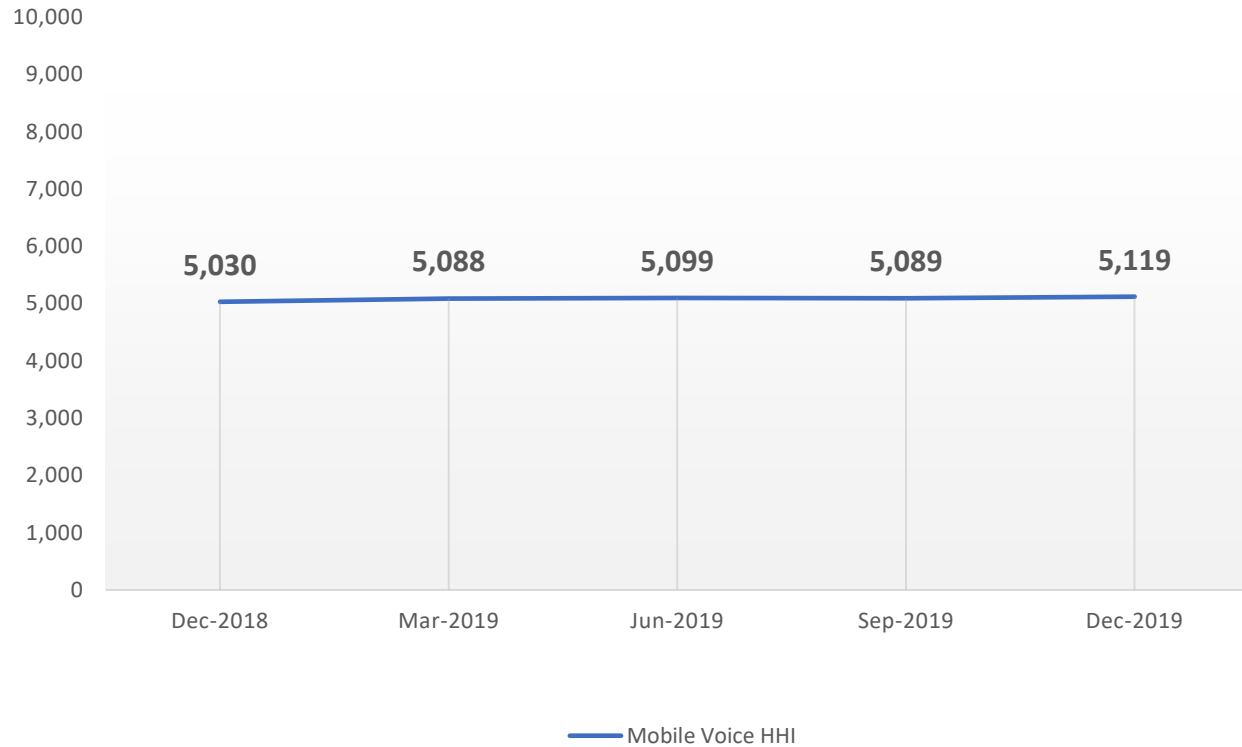
1.8%



Q-o-Q  
PERCENT CHANGE

0.6%

HHI for Domestic Mobile Services  
Q4 2018 to Q4 2019



# Average Revenue Per User

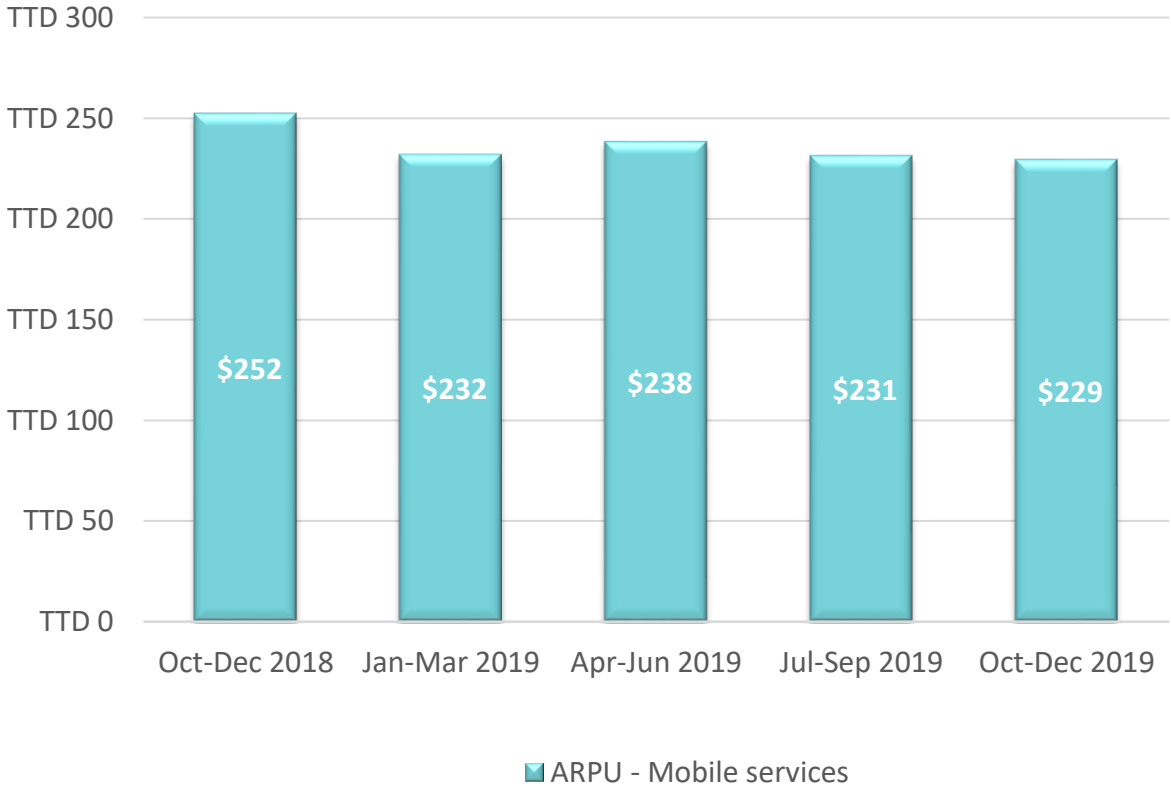
## Mobile Services



ARPU

**\$229**

ARPU for Domestic Mobile Services  
Q4 2018 to Q4 2019



Y-o-Y  
PERCENT CHANGE

**-9.1%**



Q-o-Q  
PERCENT CHANGE

**-0.9%**

# Fixed Broadband Subscriptions

TOTAL NUMBER OF SUBSCRIPTIONS

344,700

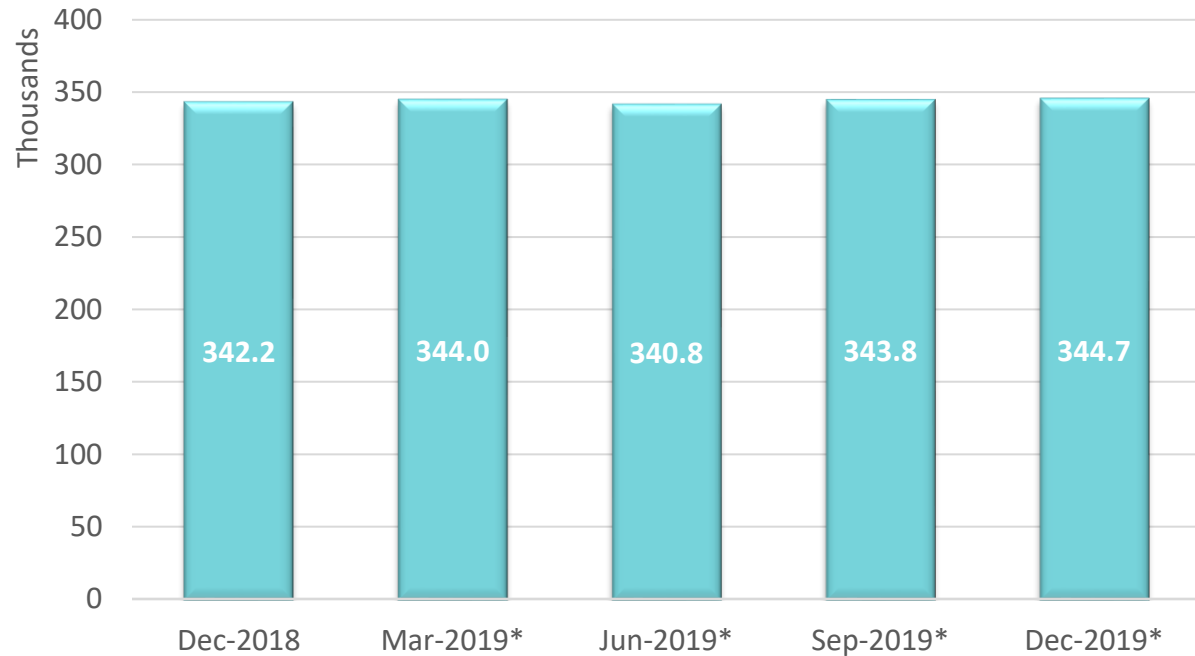
Y-o-Y PERCENT CHANGE

0.7%

Q-o-Q PERCENT CHANGE

0.3%

Number of Fixed Broadband Internet Subscriptions  
Q4 2018 to Q4 2019



■ Fixed Broadband Internet Subscriptions

*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited Mar-Dec 2019, Lisa Communications Jun-Dec 2019, Greendot Limited Dec 2019 and partial submission from Telecommunications Services of Trinidad and Tobago Limited.*

# Fixed Internet Penetration



**FIXED INTERNET  
PENETRATION PER  
100 INHABITANTS**

**24.8**



**Y-o-Y  
PERCENT CHANGE**

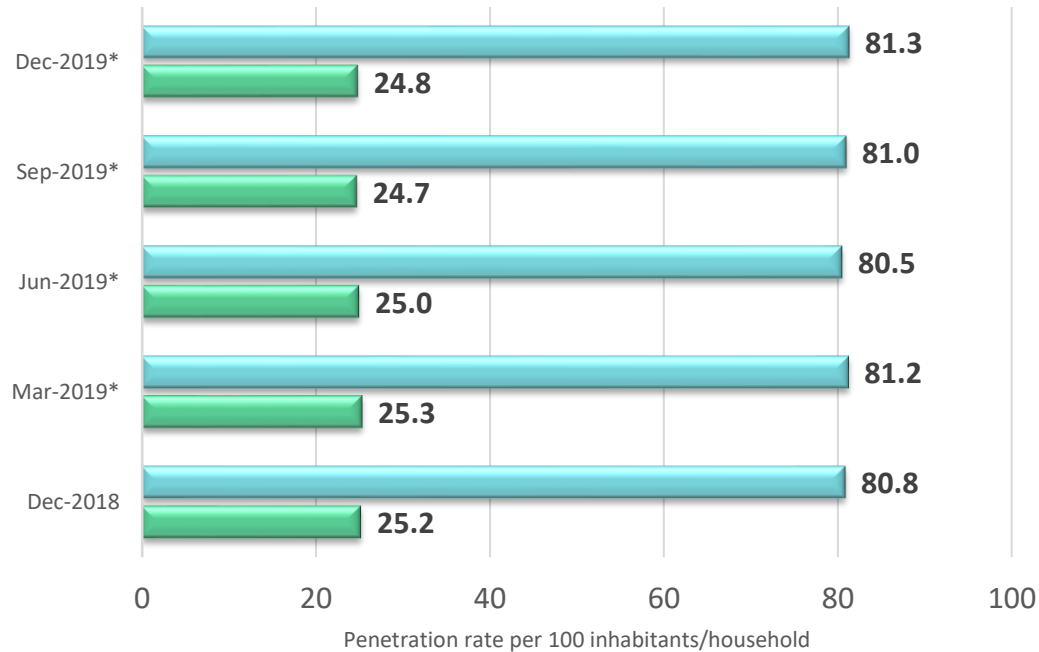
**-1.5%**



**Q-o-Q  
PERCENT CHANGE**

**0.5%**

**Penetration for Fixed Internet Subscriptions Q4 2018  
to Q4 2019**



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited Mar-Dec 2019, Lisa Communications Jun-Dec 2019, Greendot Limited Dec 2019 and partial submission from Telecommunications Services of Trinidad and Tobago Limited.*



**FIXED INTERNET  
PENETRATION PER  
100 HOUSEHOLDS**

**81.3**



**Y-O-Y  
PERCENT CHANGE**

**0.6%**



**Q-O-Q  
PERCENT CHANGE**

**0.4%**



# Mobile Internet Penetration

MOBILE INTERNET  
PENETRATION PER 100  
INHABITANTS

42.6

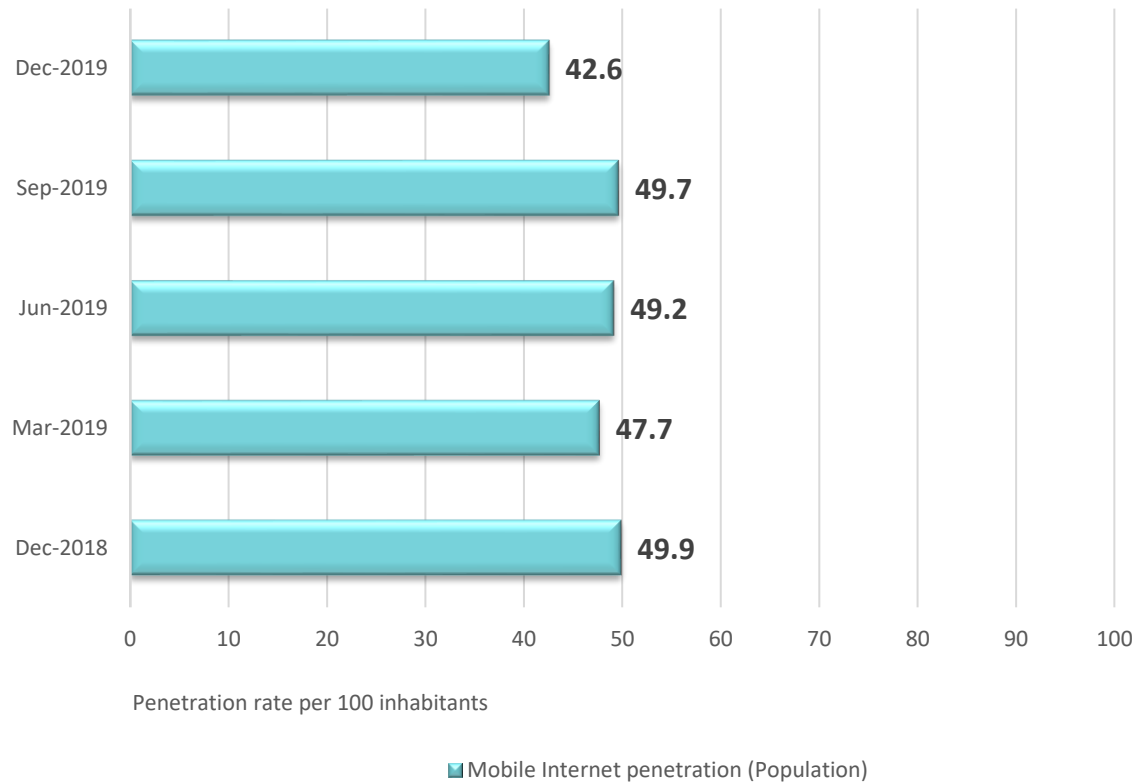
Y-o-Y  
PERCENT CHANGE

-14.7%

Q-o-Q  
PERCENT CHANGE

-14.2%

Penetration for Mobile Internet Subscriptions Q4 2018 to Q4 2019



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

# Fixed Internet Revenues



GROSS REVENUES

\$287.0m



Y-o-Y  
PERCENT CHANGE

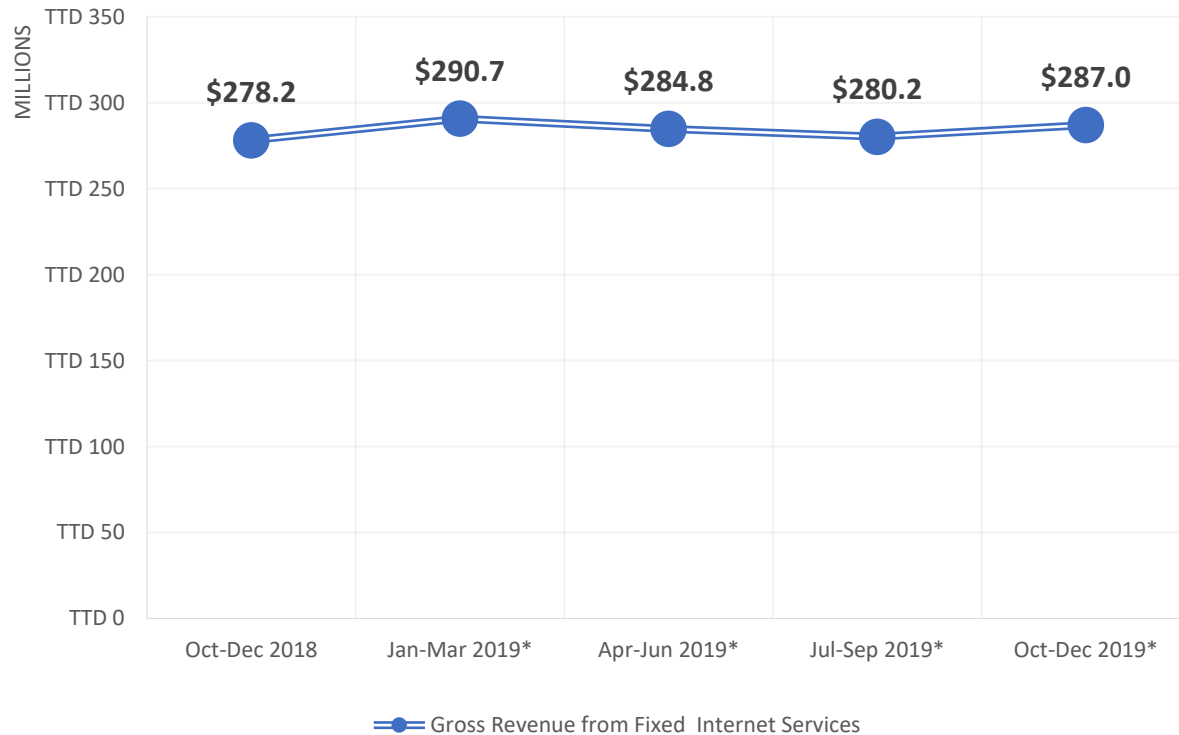
3.2%



Q-o-Q  
PERCENT CHANGE

2.4%

Gross Revenues from Fixed Internet Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited Mar-Dec 2019, Lisa Communications Jun-Dec 2019, Greendot Limited Dec 2019 and partial submission from Telecommunications Services of Trinidad and Tobago Limited.*

# Fixed Internet HHI



HHI

3,019



Y-o-Y  
PERCENT CHANGE

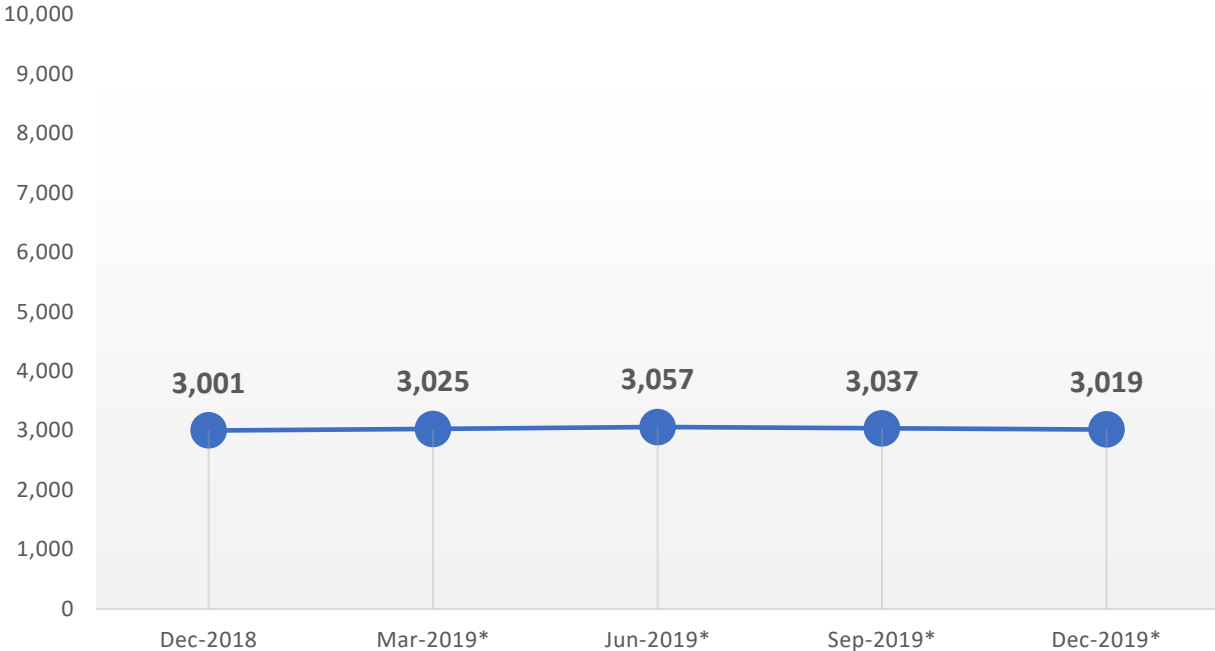
0.6%



Q-o-Q  
PERCENT CHANGE

-0.6%

HHI for Fixed Internet Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited Mar-Dec 2019, Lisa Communications Jun-Dec 2019, Greendot Limited Dec 2019 and partial submission from Telecommunications Services of Trinidad and Tobago Limited*

# Fixed Internet Average Revenue Per User

ARPU

\$

\$864

Y-o-Y

PERCENT CHANGE

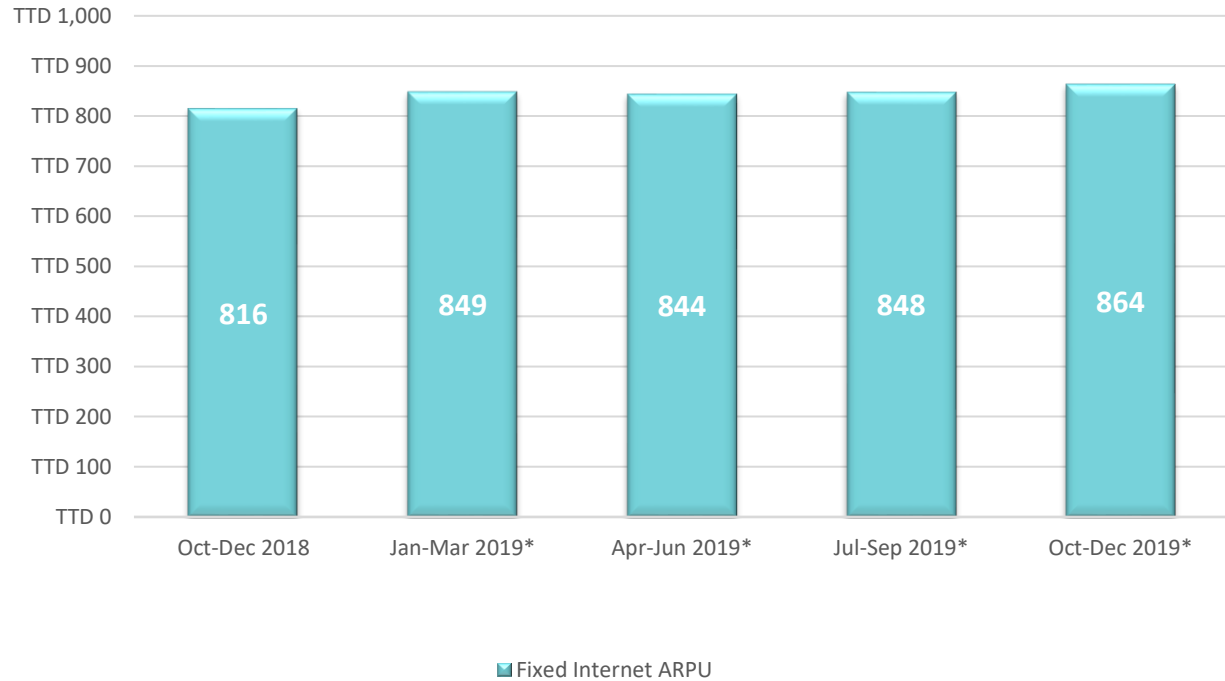
5.9%

Q-o-Q

PERCENT CHANGE

1.9%

ARPU for Fixed Internet Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaire who had not submitted data at the date of publication: Open Telecom Limited Mar-Dec 2019, Lisa Communications Jun-Dec 2019, Greendot Limited Dec 2019 and partial submission from Telecommunications Services of Trinidad and Tobago Limited*

# Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

250,000



Y-o-Y PERCENT CHANGE

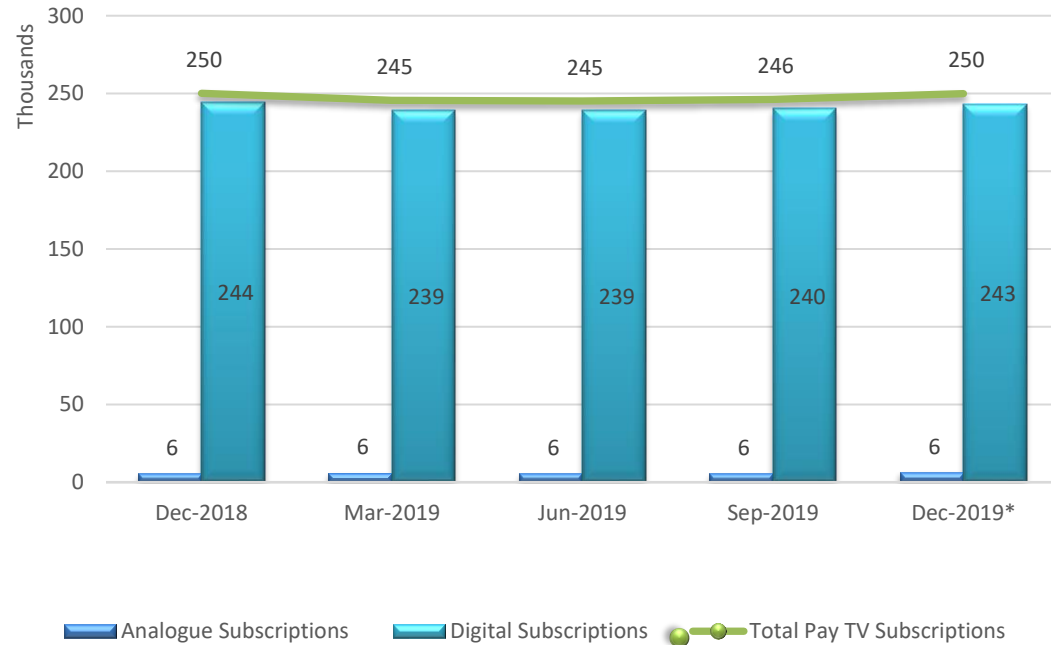
-0.1%



Q-o-Q PERCENT CHANGE

1.5%

Number of Subscription TV Subscriptions  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited, Independent Cable Network of Trinidad and Tobago and Network Technologies Limited.*

# Pay TV Penetration



PAY TV  
PENETRATION PER  
100 INHABITANTS

18.1



Y-o-Y  
PERCENT CHANGE

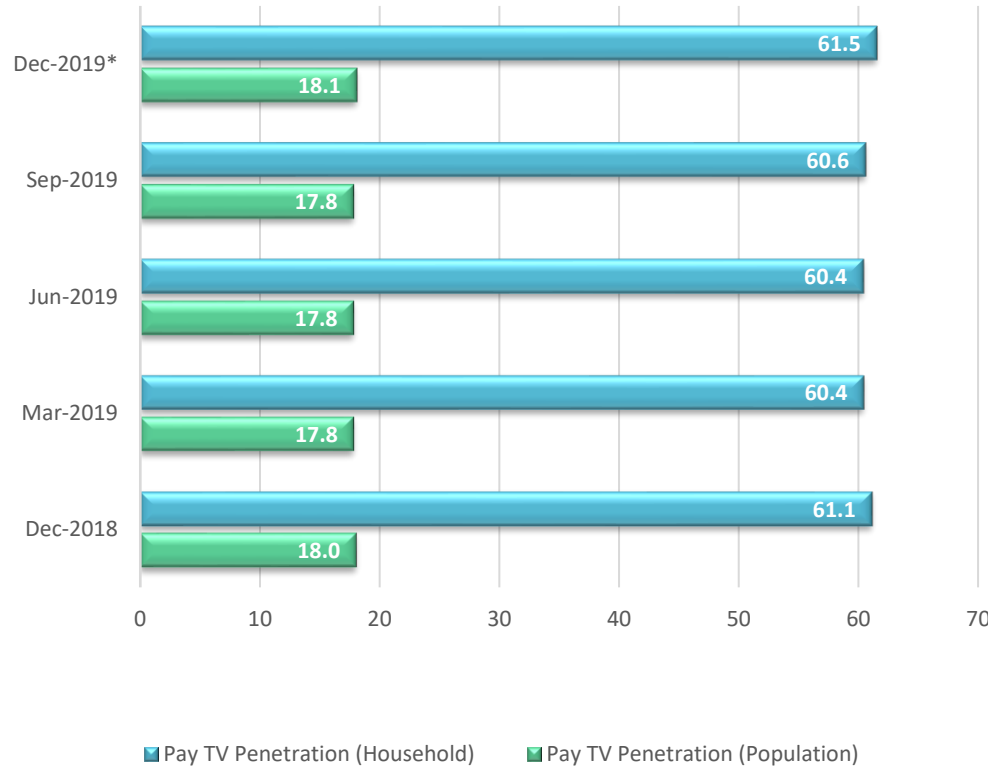
0.3%



Q-o-Q  
PERCENT CHANGE

1.6%

Penetration Rate of Subscription TV Subscriptions  
Q4 2018 to Q4 2019



PAY TV  
PENETRATION PER  
100 HOUSEHOLDS

61.5



Y-O-Y  
PERCENT CHANGE

0.7%



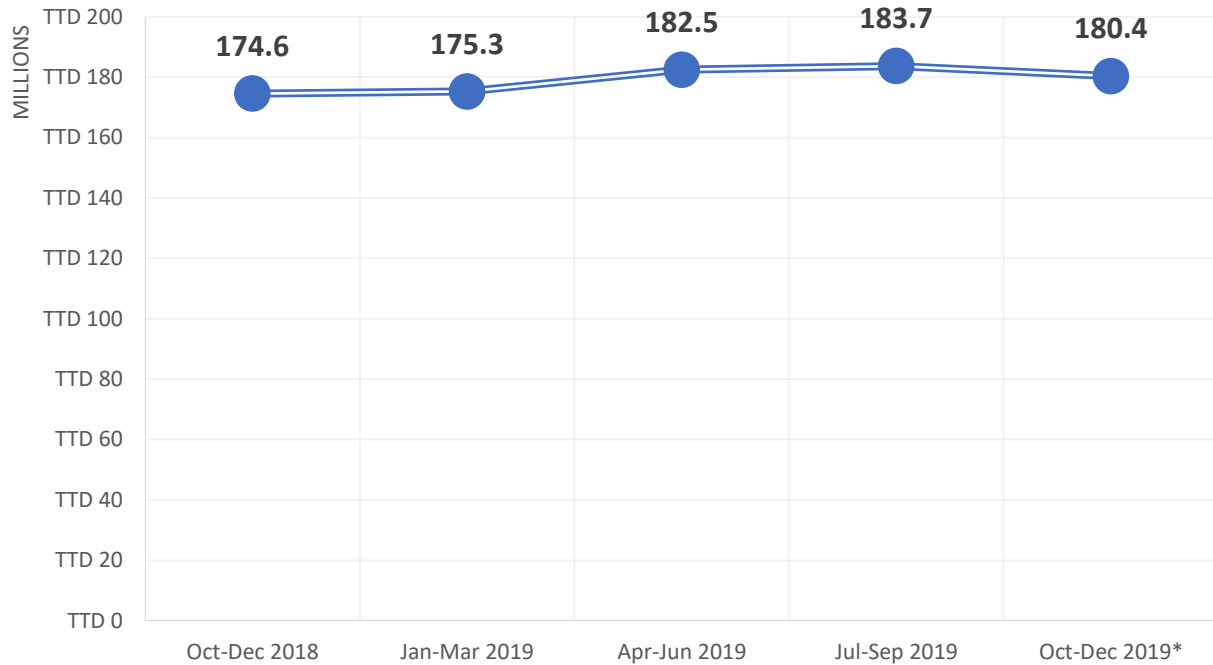
Q-o-Q  
PERCENT CHANGE

1.6%

*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited, Independent Cable Network of Trinidad and Tobago and Network Technologies Limited.*

# Pay TV Revenues

Gross Revenues from Subscription TV Services  
Q4 2018 to Q4 2019



—●— Gross Revenues from Pay TV Subscriptions

*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited, Independent Cable Network of Trinidad and Tobago and Network Technologies Limited.*



GROSS REVENUES

\$180.4m



Y-o-Y  
PERCENT CHANGE

3.3%



Q-o-Q  
PERCENT CHANGE

-1.8%



HHI

3,136



Y-o-Y  
PERCENT CHANGE

5.0%

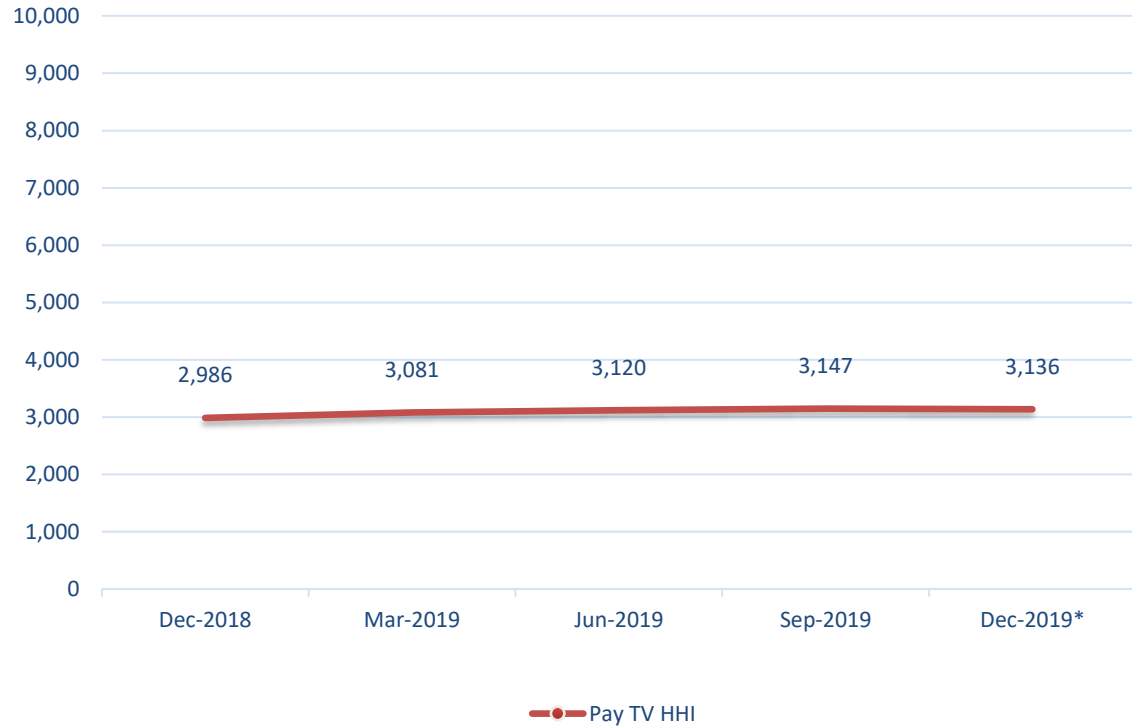


Q-o-Q  
PERCENT CHANGE

-0.3%

# Pay TV HHI

HHI for Pay TV Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited, Independent Cable Network of Trinidad and Tobago and Network Technologies Limited.*



# Pay TV

## Average Revenue Per User

ARPU

\$  
**\$734**

Y-o-Y

PERCENT CHANGE

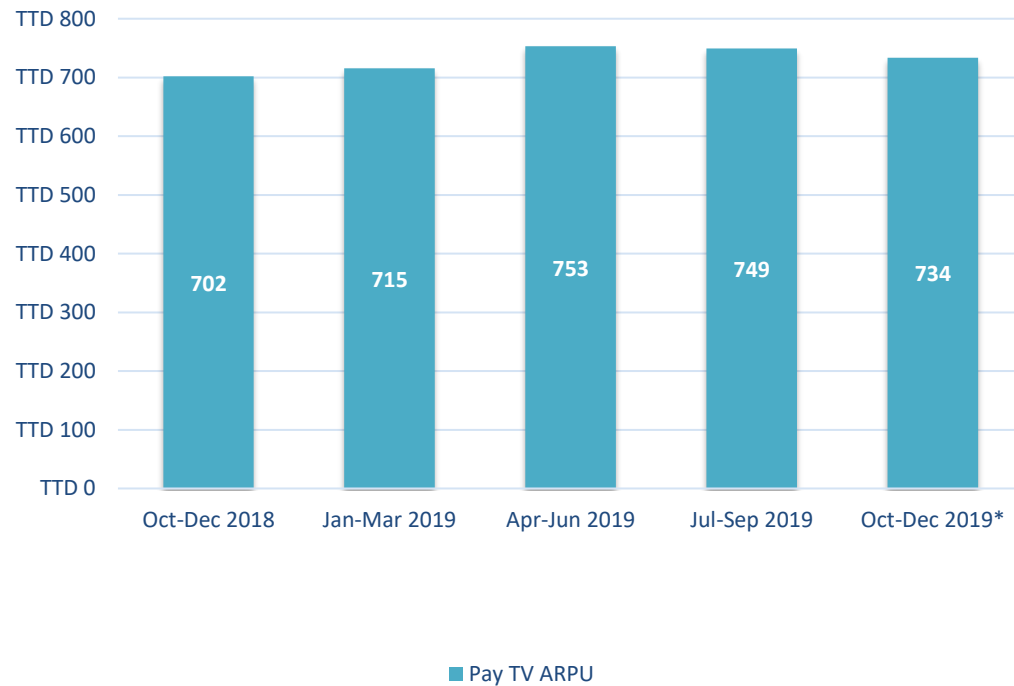
**4.5%**

Q-o-Q

PERCENT CHANGE

**-2.1%**


ARPU for Subscription TV Services  
Q4 2018 to Q4 2019




*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited, Independent Cable Network of Trinidad and Tobago and Network Technologies Limited.*

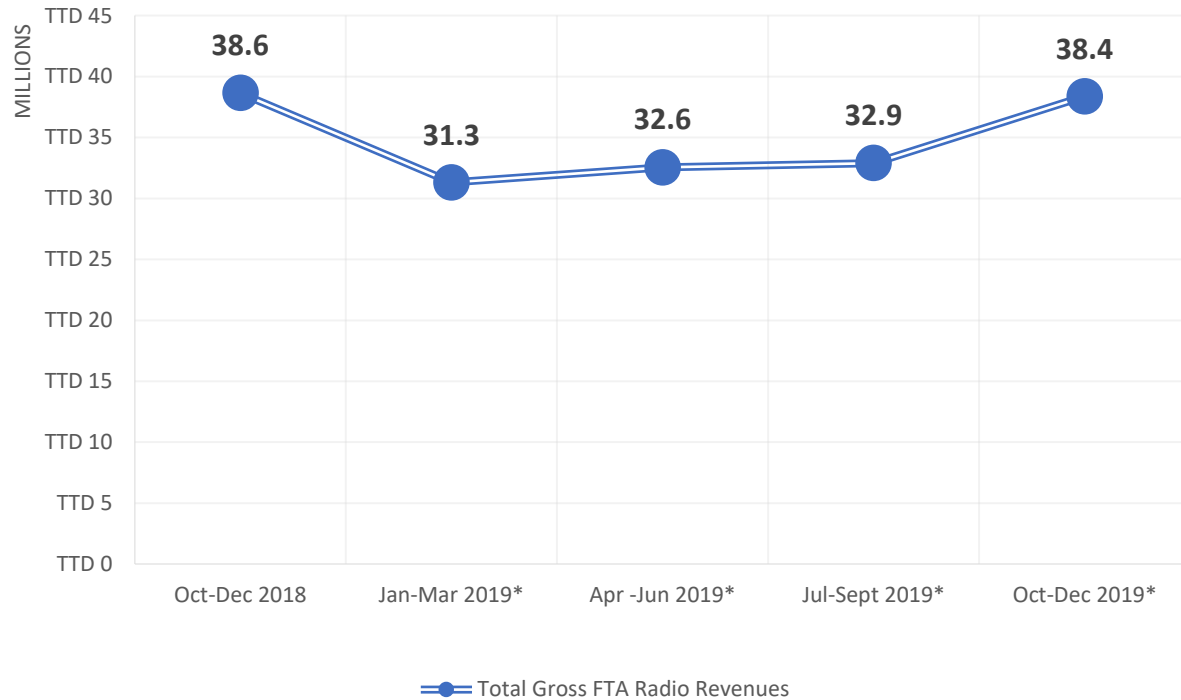
# Free-to-Air Radio Revenues


**GROSS REVENUES**  
**\$38.4m**


**Y-o-Y  
PERCENT CHANGE**  
**-0.7%**


**Q-o-Q  
PERCENT CHANGE**  
**16.6%**

Gross Revenues from Free to Air Radio Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Family Focus Oct-Dec 2019, Kaisoca Productions Limited Jan-Dec 2019, Radio Toco April-Dec 2019, Trinibashment Limited Jan-Dec 2019, Upward Trend Entertainment Limited Jan-Dec 2019, VL Communications Oct-Dec 2019 and TTRN Oct-Dec 2019.*

# Free-to-Air Radio HHI



HHI

490



Y-o-Y  
PERCENT CHANGE

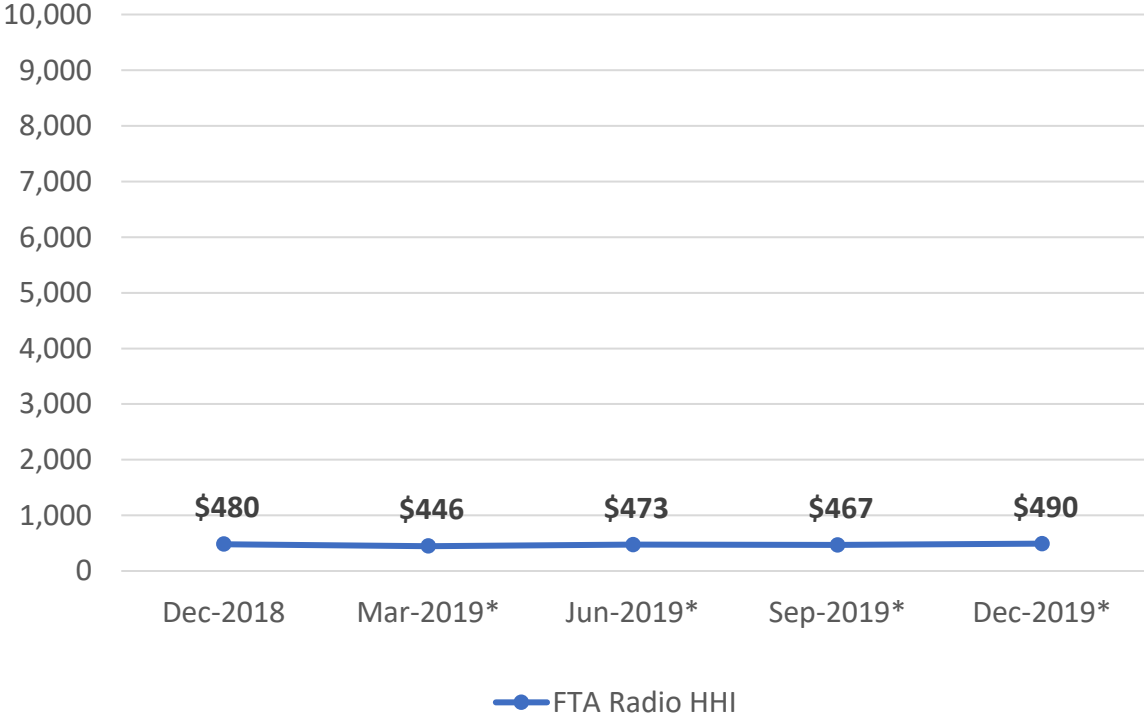
2.0%



Q-o-Q  
PERCENT CHANGE

5.0%

HHI for Free to Air Radio Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Family Focus Oct-Dec 2019, Kaisoca Productions Limited Jan-Dec 2019, Radio Toco April-Dec 2019, Trinibashment Limited Jan-Dec 2019, Upward Trend Entertainment Limited Jan-Dec 2019, VL Communications Oct-Dec 2019 and TTRN Oct-Dec 2019.*

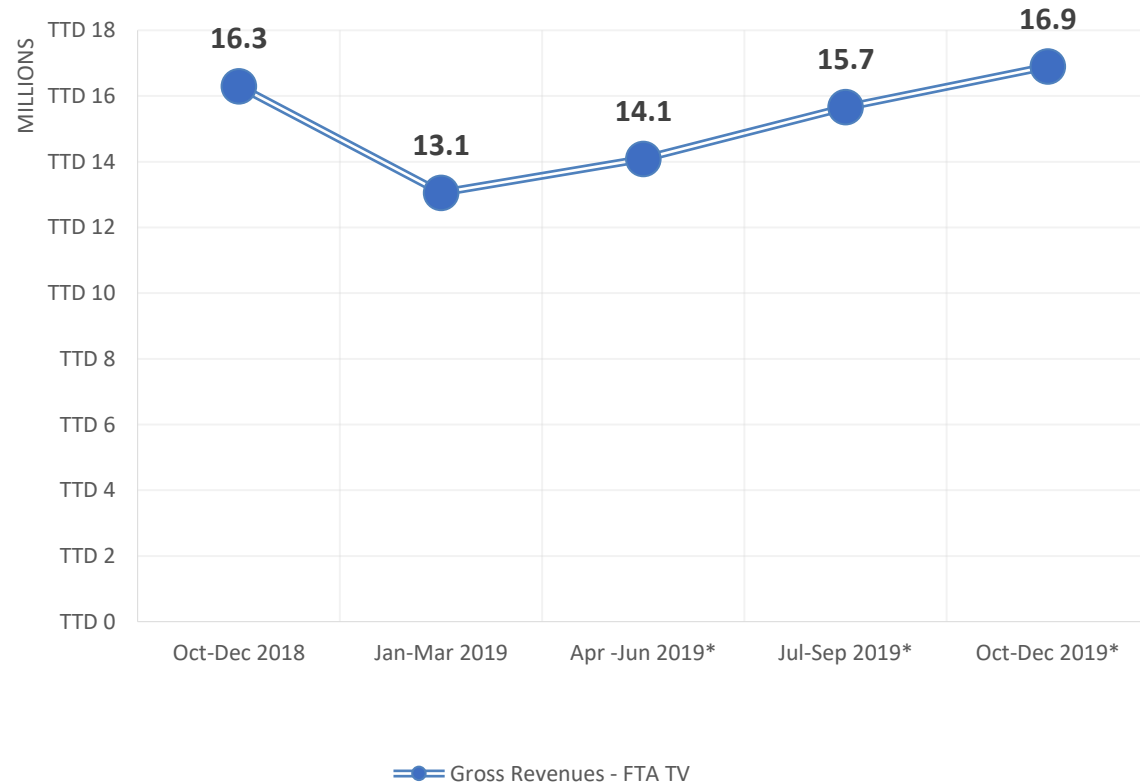
# Free-to-Air TV Revenues

**\$** GROSS REVENUES  
**\$16.9m**

**Y-o-Y**  
PERCENT CHANGE  
**3.7%**

**Q-o-Q**  
PERCENT CHANGE  
**7.9%**

Gross Revenues from Free to Air TV Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network Television Jul-Dec 2019 and IBN Oct-Dec 2019.*

# Free-to-Air TV HHI



HHI

4,028



Y-o-Y  
PERCENT CHANGE

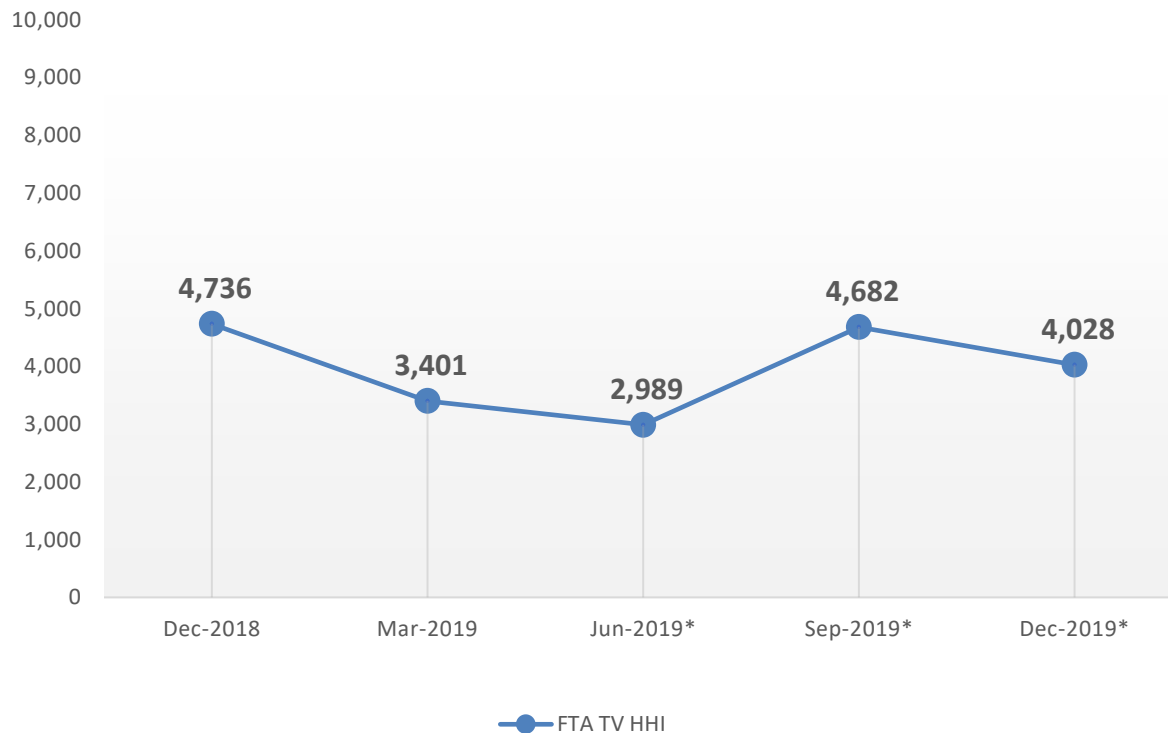
-14.9%



Q-o-Q  
PERCENT CHANGE

-14.0%

HHI for Free to Air TV Services  
Q4 2018 to Q4 2019



*\*Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Advanced Community Network Television Jul-Dec 2019 and IBN Oct-Dec 2019.*



# QUARTERLY MARKET UPDATE

October to December 2019