



QUARTERLY MARKET UPDATE

January to March 2020

Quarterly Market Update – Q1 2020

The Telecommunications Authority of Trinidad and Tobago
8th Avenue Extension
Barataria
Republic of Trinidad and Tobago

Tel: 1-868-675-8288

Fax: 1-868-674-1055

Website: <http://www.tatt.org.tt>

Email: policy@tatt.org.tt

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Contents

Telecommunications Sector

01

Fixed Voice Market

02

Mobile Market

03

Internet Market

Broadcasting Sector

04

Pay TV Market

05

Free-to-Air Radio Market

06

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 population figures:**
 - a) **1,363,985 (2019 Mid-year population estimate, Central Statistical Office)**

 - b) **Number of households used - 401,382 (Trinidad and Tobago 2011 Population and Housing Census Demographic Report, Central Statistical Office)**

Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

347,000



Y-o-Y PERCENT CHANGE

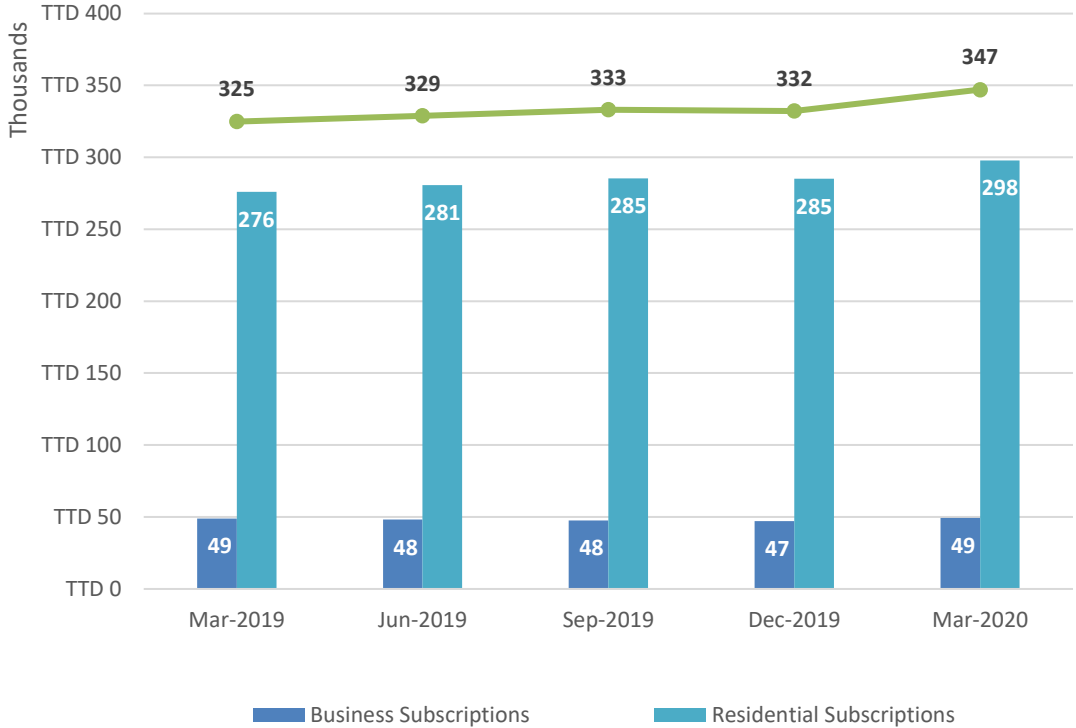
6.8%



Q-o-Q PERCENT CHANGE

4.5%

Number of Fixed Line Subscriptions
Q1 2019 to Q1 2020



Fixed Voice Penetration

FIXED VOICE
PENETRATION PER
100 INHABITANTS

25.4

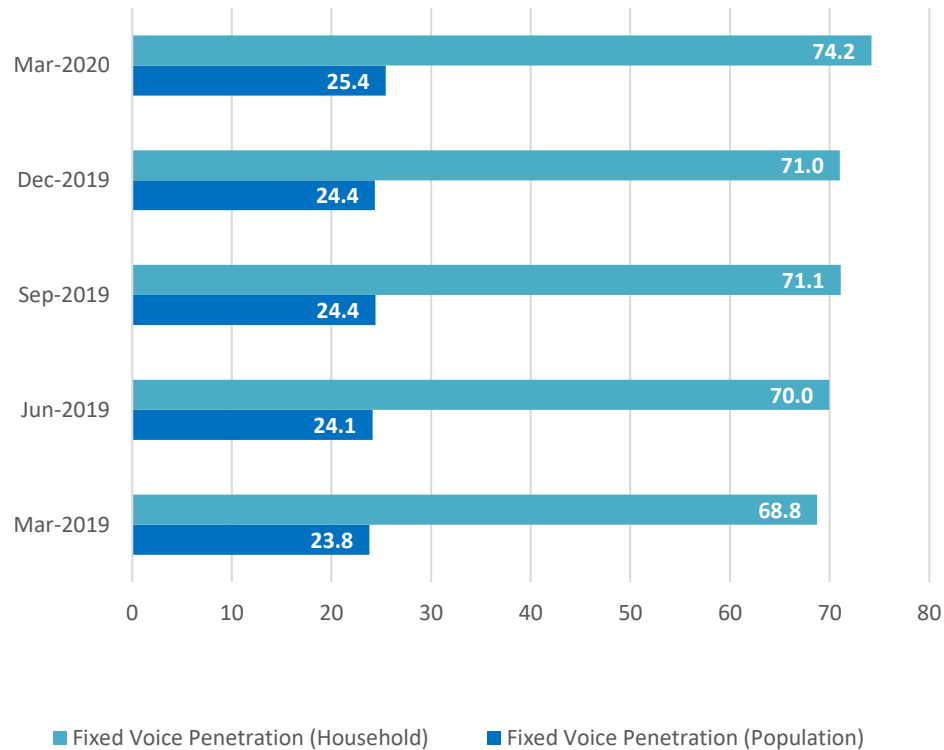
Y-o-Y
PERCENT CHANGE

6.8%

Q-o-Q
PERCENT CHANGE

4.5%

Penetration Rate of Fixed Line Subscriptions
from Q1 2019 to Q1 2020



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

74.2

Y-o-Y
PERCENT CHANGE

7.9%

Q-o-Q
PERCENT CHANGE

4.5%

Fixed Voice Revenues



GROSS REVENUES

\$131.6m



Y-o-Y
PERCENT CHANGE

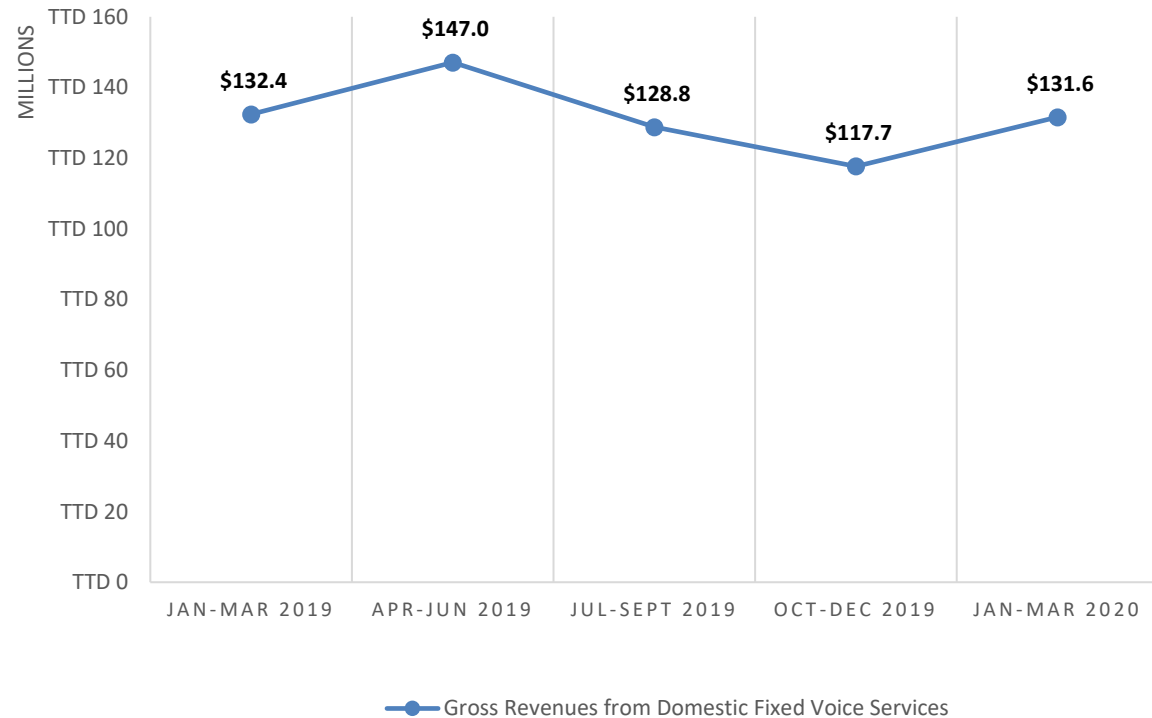
-0.6%



Q-o-Q
PERCENT CHANGE

11.8%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES
FROM Q1 2019 TO Q1 2020





HHI

3,742



Y-o-Y
PERCENT CHANGE

-5.6%

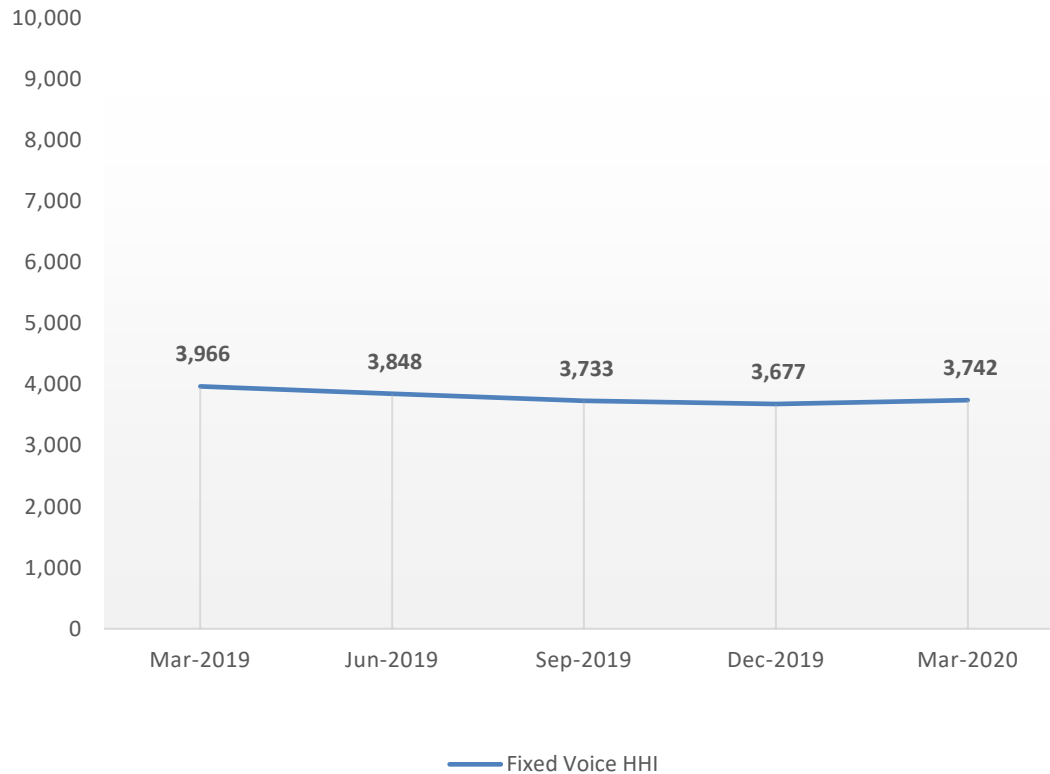


Q-o-Q
PERCENT CHANGE

1.8%

Fixed Voice HHI

HHI for Domestic Fixed Line
from Q1 2019 to Q1 2020



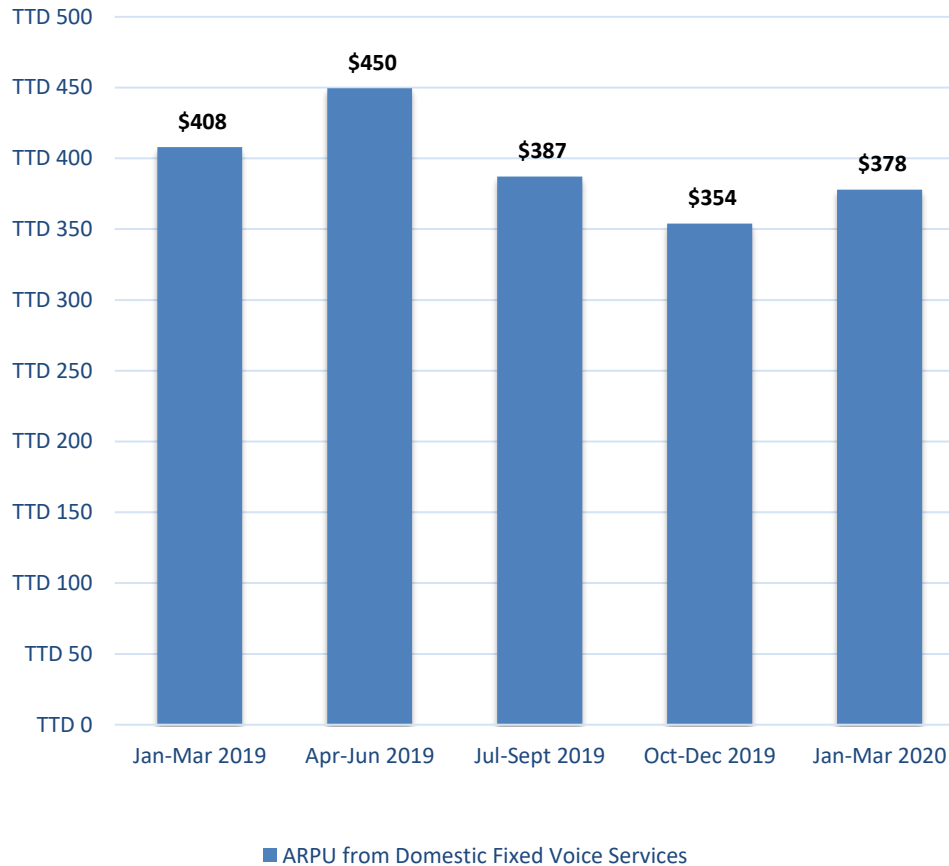
Fixed Voice Average Revenue Per User

ARPU

\$

\$378

ARPU from Domestic Fixed Voice Services
from Q1 2019 to Q1 2020



Y-o-Y
PERCENT CHANGE

-7.3%

Q-o-Q
PERCENT CHANGE

6.8%

Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,113,000



Y-o-Y PERCENT CHANGE

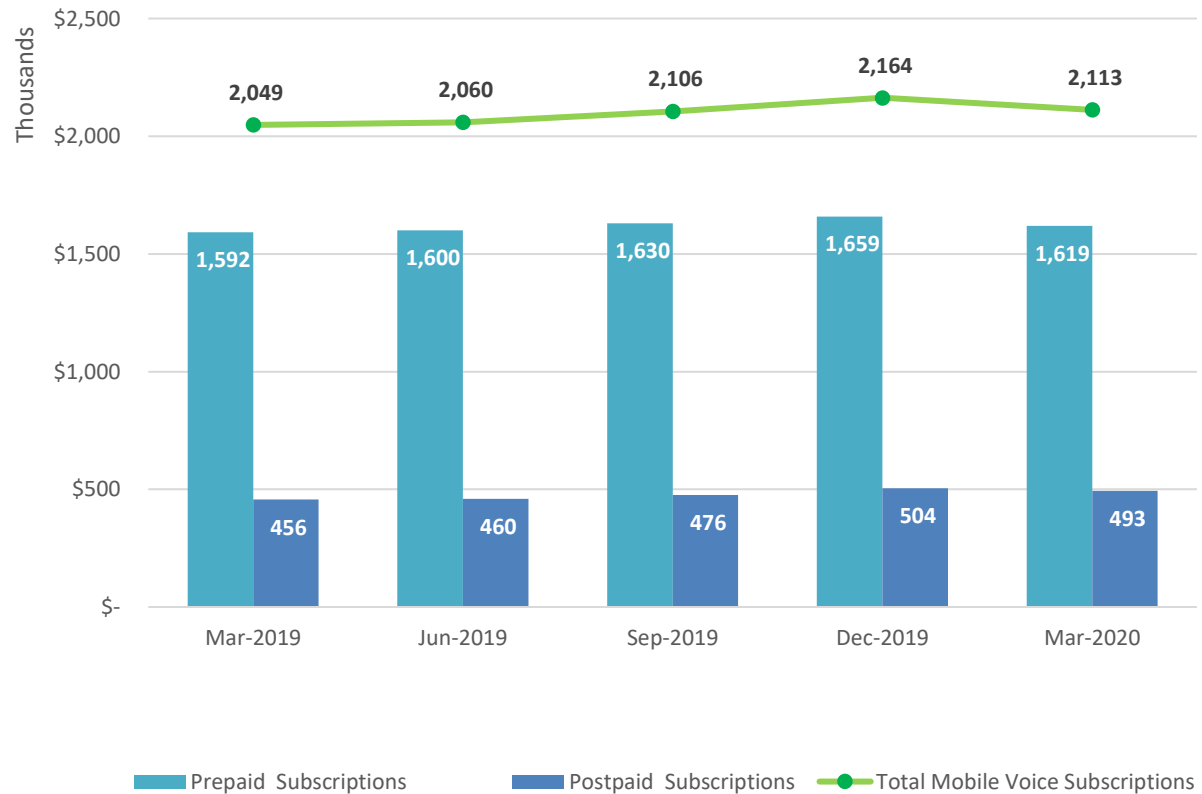
3.1%



Q-o-Q PERCENT CHANGE

-2.4%

Number of Mobile Voice Subscriptions from Q1 2019 to Q1 2020



Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

155



Y-o-Y
PERCENT CHANGE

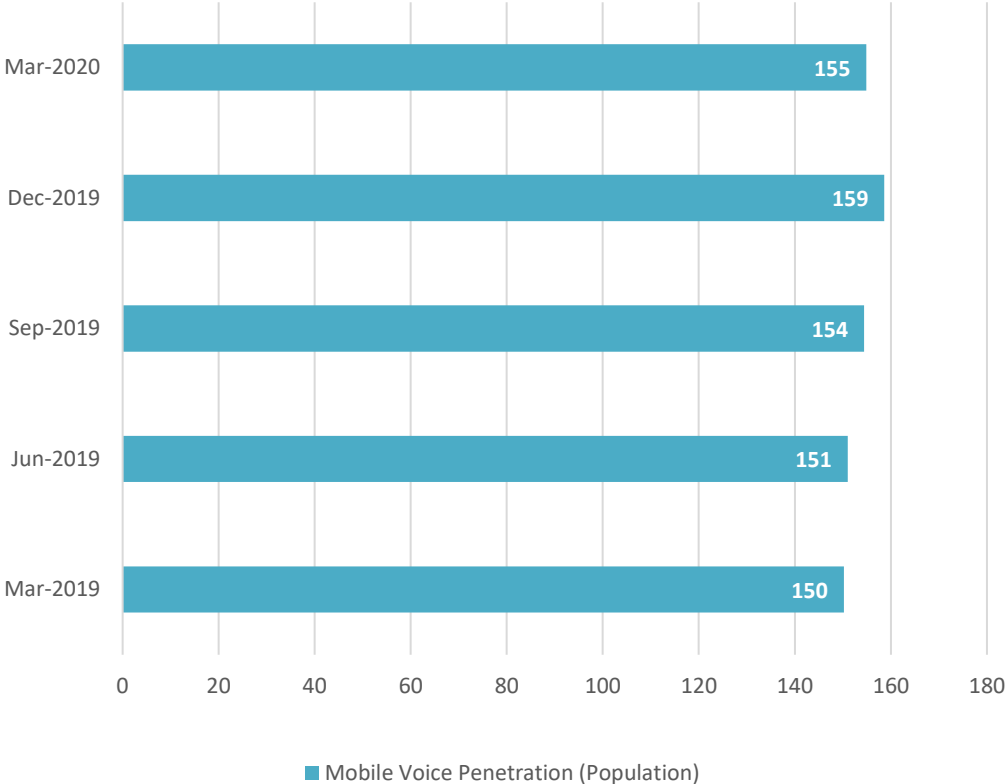
3.1%



Q-o-Q
PERCENT CHANGE

-2.4%

Penetration of Mobile Voice Subscriptions
from Q1 2019 to Q1 2020



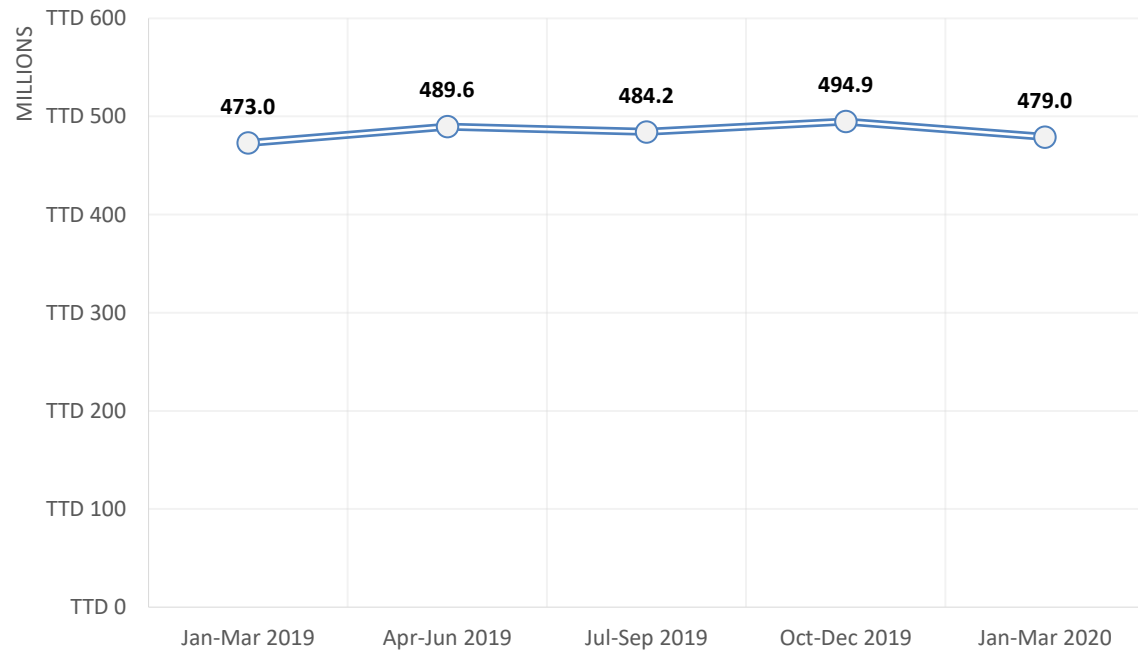
Mobile Services Revenues

\$

GROSS REVENUES

\$479.0m

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$)
FROM Q1 2018 TO Q1 2019



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

Includes revenues from Mobile voice and Internet services.



Y-o-Y
PERCENT CHANGE

1.3%



Q-o-Q
PERCENT CHANGE

-3.2%

Mobile Voice HHI



HHI

5,155



Y-o-Y
PERCENT CHANGE

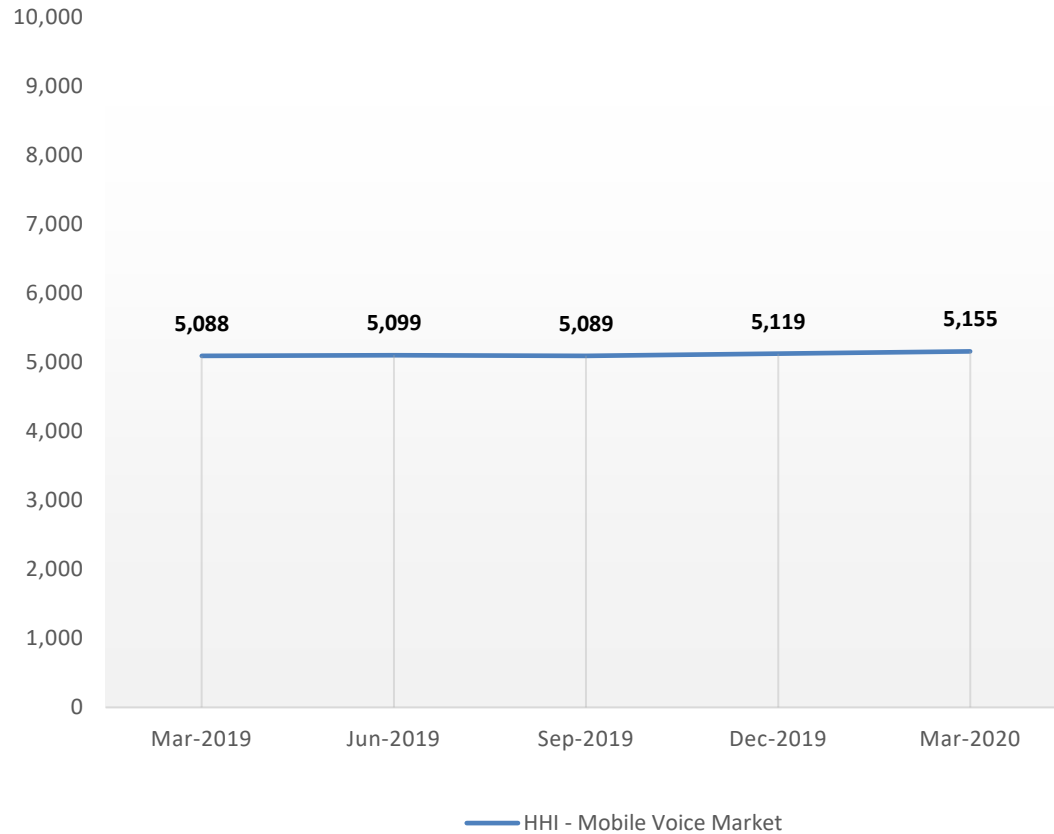
1.3%



Q-o-Q
PERCENT CHANGE

0.7%

HHI for Domestic Mobile Services
from Q1 2019 to Q1 2020



Average Revenue Per User

Mobile Services



ARPU

\$224



Y-o-Y
PERCENT CHANGE

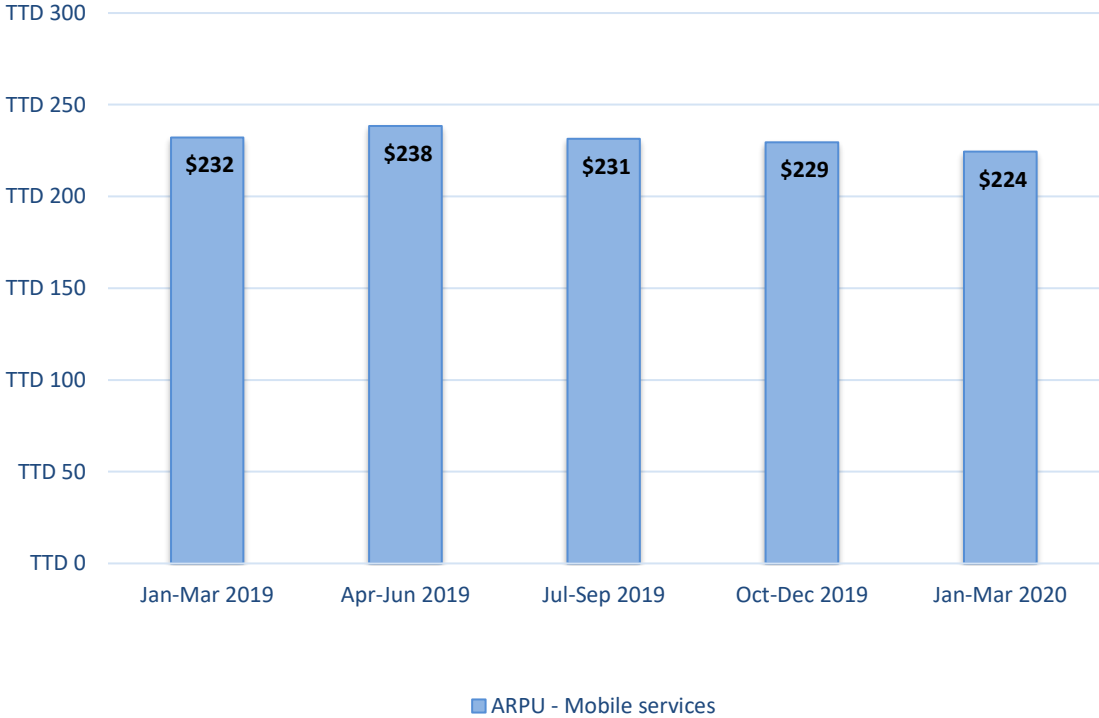
-3.3%



Q-o-Q
PERCENT CHANGE

-2.2%

ARPU for Domestic Mobile Services
from Q1 2019 to Q1 2020



Fixed Broadband Subscriptions

TOTAL NUMBER OF
SUBSCRIPTIONS

333,300

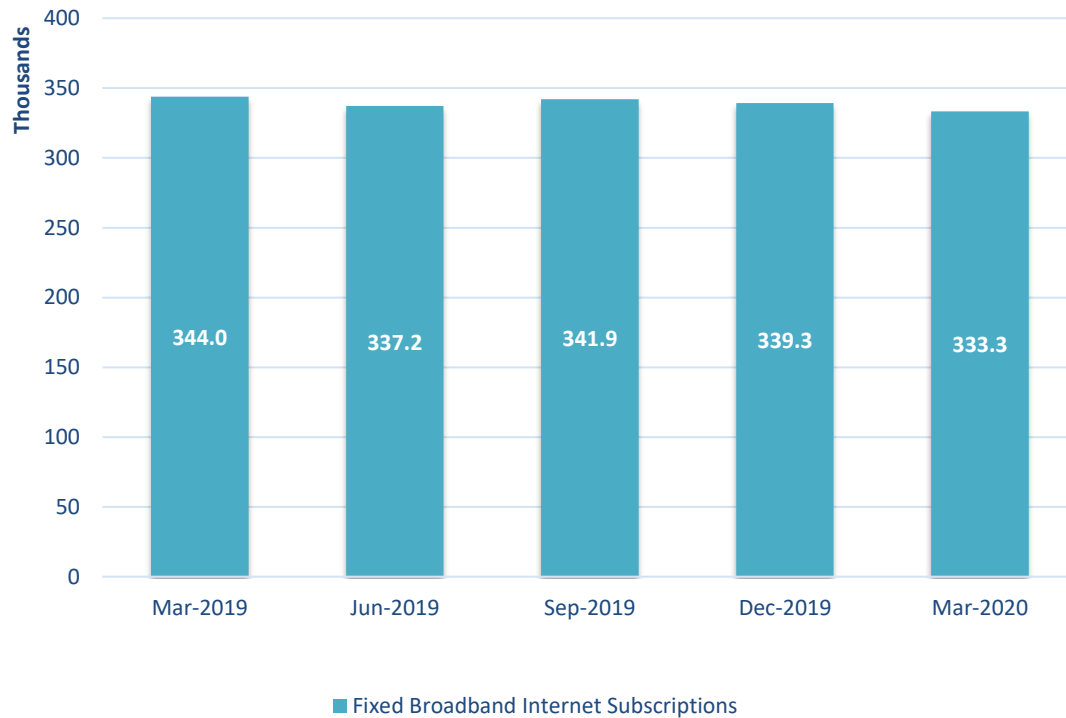
Y-o-Y
PERCENT CHANGE

-3.1%

Q-o-Q
PERCENT CHANGE

-1.8%

Number of Fixed Broadband Internet Subscriptions
from Q1 2019 to Q1 2020



Fixed Internet Penetration



FIXED INTERNET
PENETRATION PER
100 INHABITANTS

24.4



Y-o-Y
PERCENT CHANGE

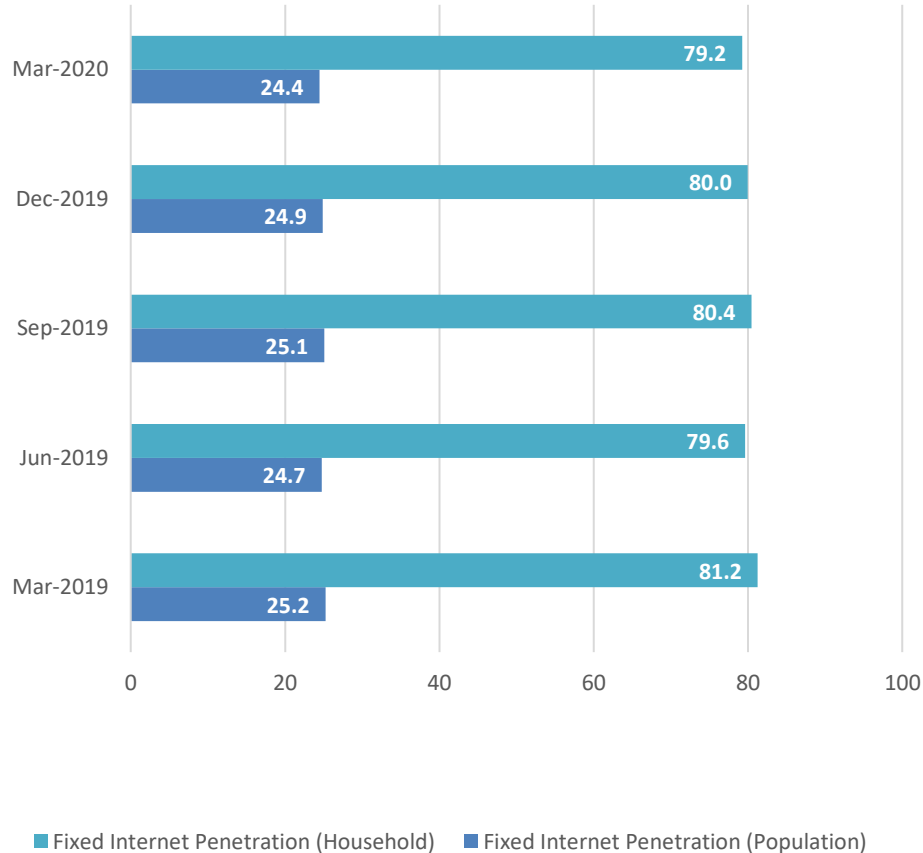
-3.1%



Q-o-Q
PERCENT CHANGE

-1.8%

Penetration for Fixed Internet Subscriptions
from Q1 2019 to Q1 2020



FIXED INTERNET
PENETRATION PER
100 HOUSEHOLDS

79.2



Y-O-Y
PERCENT CHANGE

-2.5%



Q-O-Q
PERCENT CHANGE

-0.9%

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

54.1

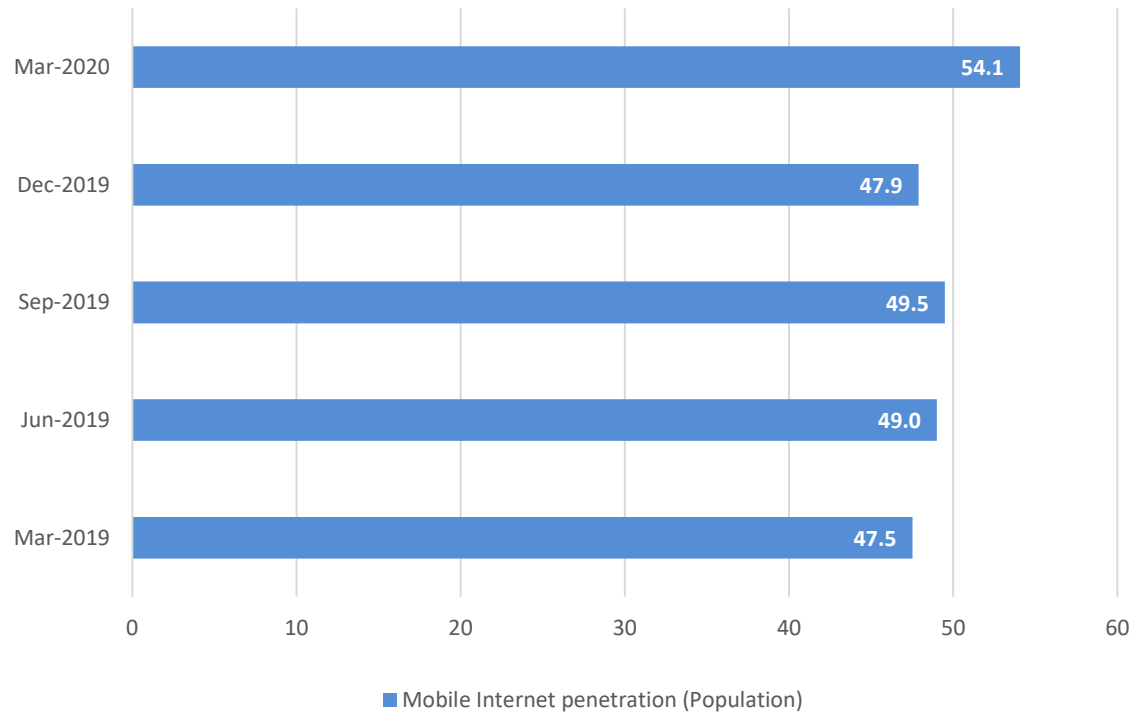
Y-o-Y
PERCENT CHANGE

13.8%

Q-o-Q
PERCENT CHANGE

12.9%

Penetration for Mobile Internet Subscriptions
from Q1 2019 to Q1 2020



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

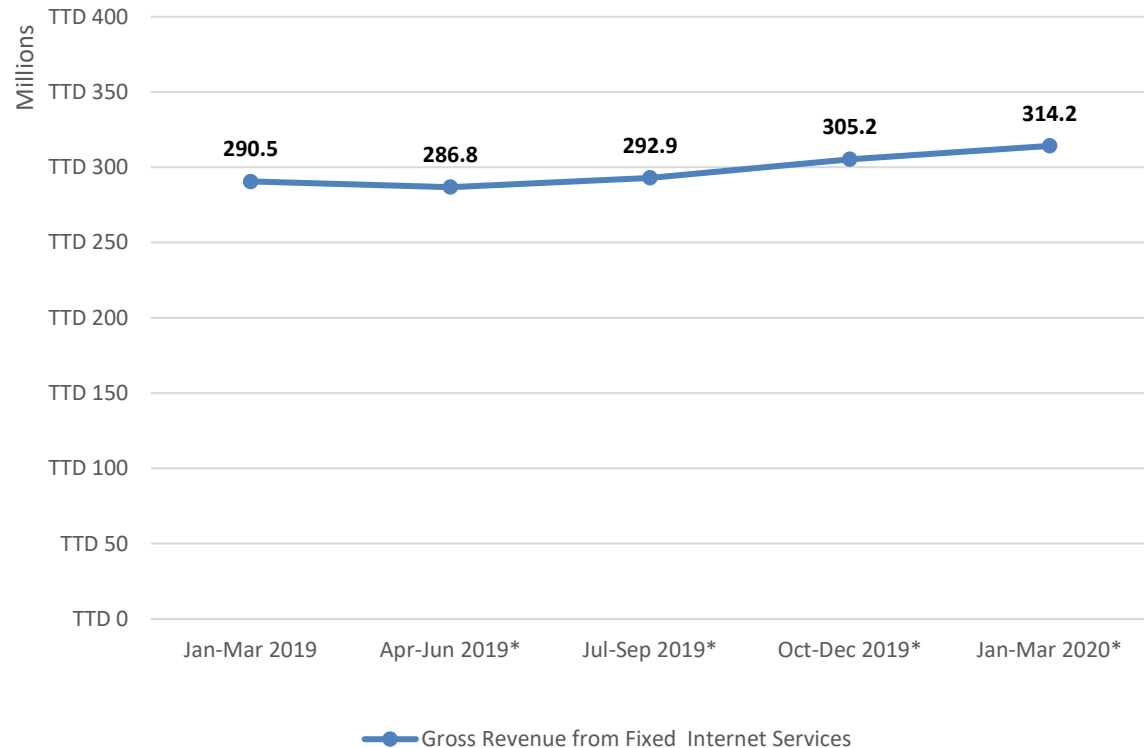
Fixed Internet Revenues

\$ GROSS REVENUES
\$314.2m

Y-o-Y
PERCENT CHANGE
8.2%

Q-o-Q
PERCENT CHANGE
3.0%

Gross Revenues from Fixed Internet Services
from Q1 2019 to Q1 2020



**Data estimated for the following concessionaire who submitted partial data at the date of publication:
Telecommunications Services of Trinidad and Tobago Jun-Dec 2019, Jan-Mar 2020*

Fixed Internet HHI



HHI

3,006



Y-o-Y
PERCENT CHANGE

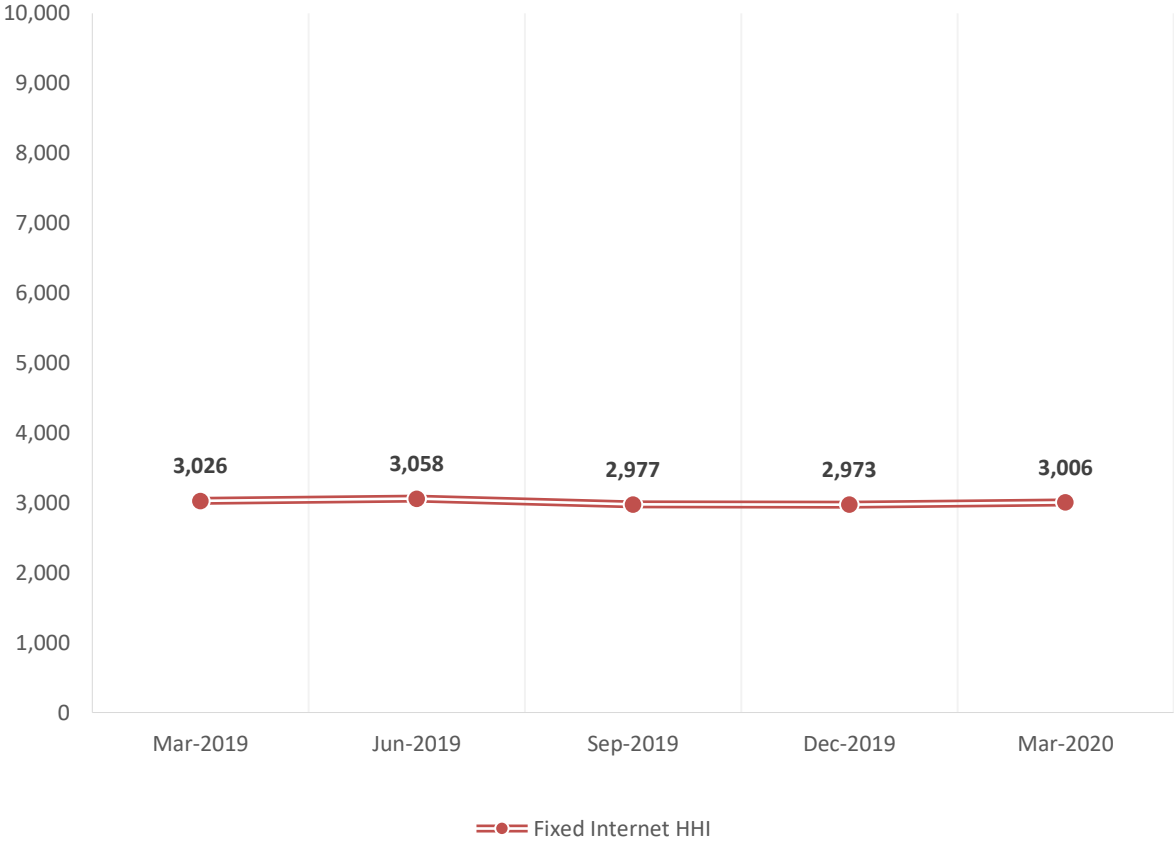
-0.6%



Q-o-Q
PERCENT CHANGE

1.1%

HHI FOR FIXED INTERNET SERVICES
FROM Q1 2019 TO Q1 2020



Fixed Internet Average Revenue Per User

ARPU

\$

\$943

Y-o-Y

PERCENT CHANGE

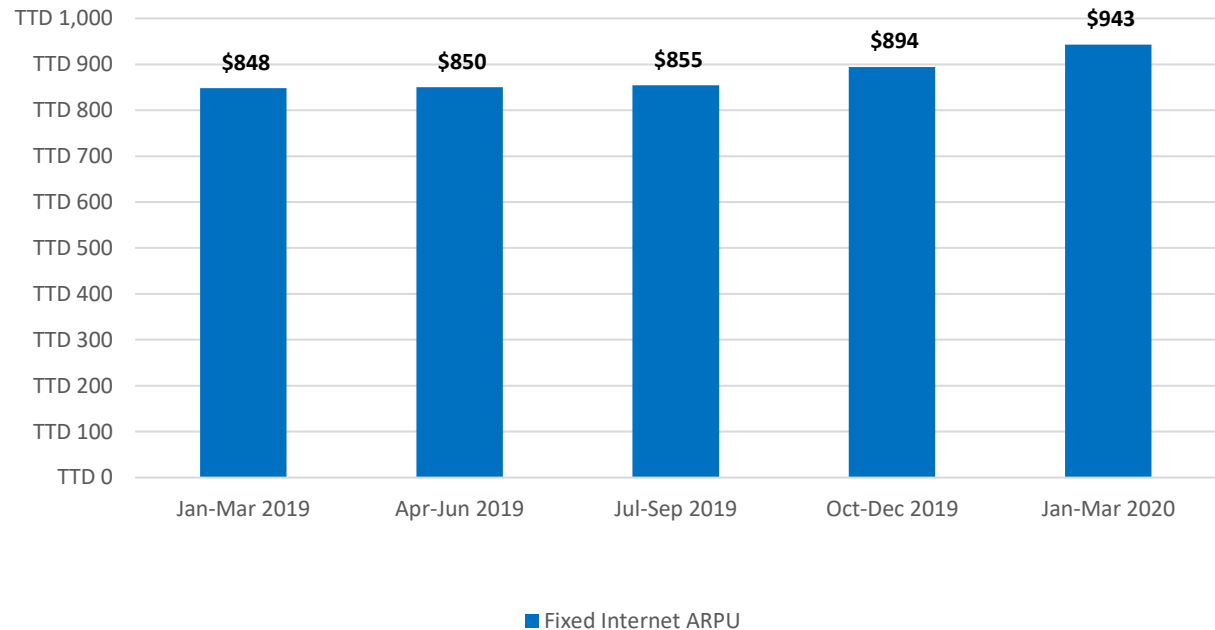
11.2%

Q-o-Q

PERCENT CHANGE

5.4%

ARPU for Fixed Internet Services
from Q1 2019 to Q1 2020



**Data estimated for the following concessionaire who submitted partial data at the date of publication:
Telecommunications Services of Trinidad and Tobago Jun-Dec 2019, Jan-Mar 2020*

Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

246,200



Y-o-Y PERCENT CHANGE

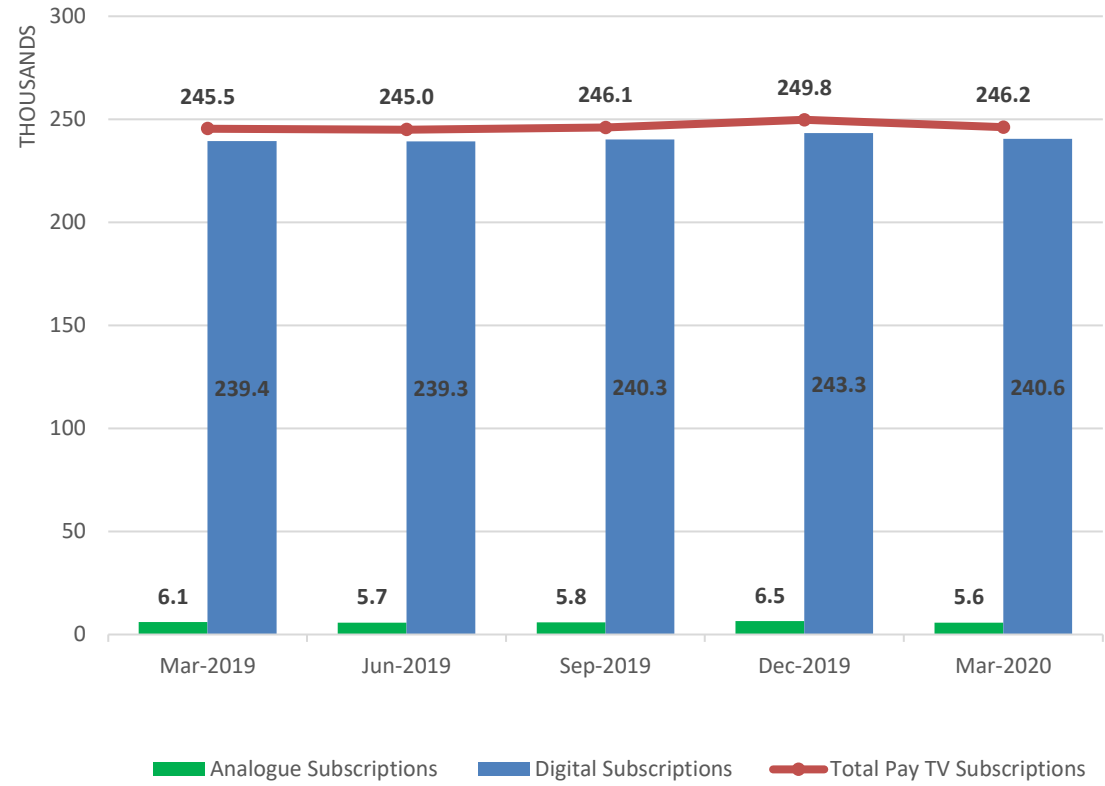
0.3%



Q-o-Q PERCENT CHANGE

-1.4%

Number of Pay TV Subscriptions from Q1 2019 to Q1 2020



Pay TV Penetration



**PAY TV
PENETRATION PER
100 INHABITANTS**

17.9



**Y-o-Y
PERCENT CHANGE**

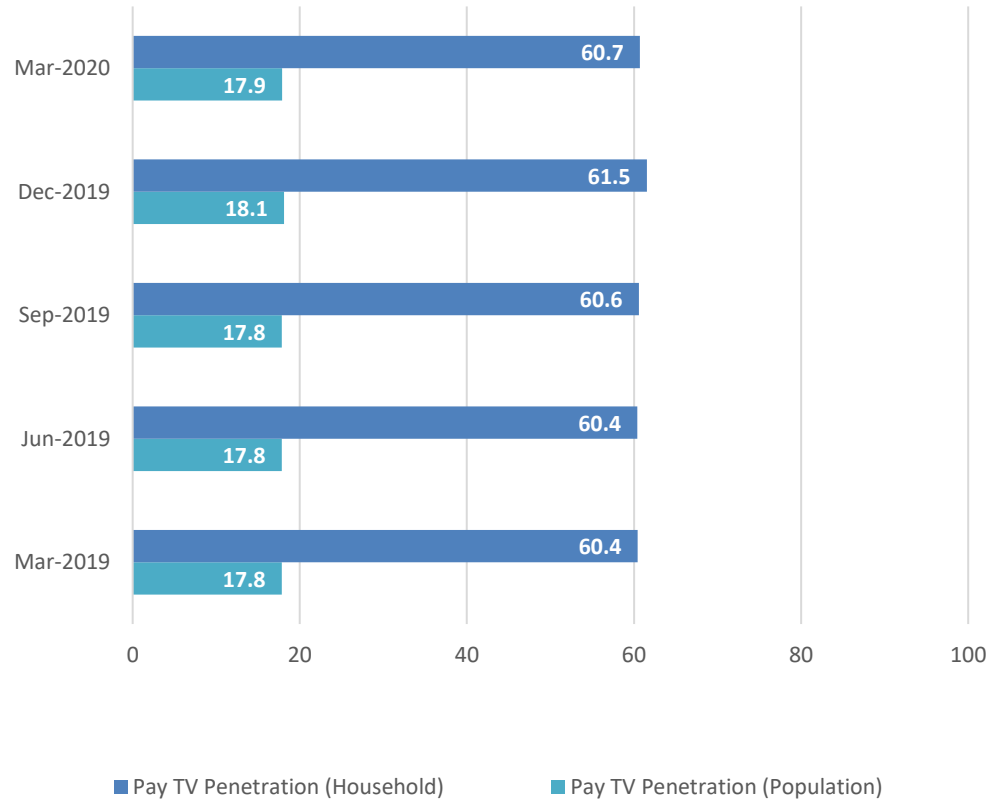
0.1%



**Q-o-Q
PERCENT CHANGE**

-1.3%

**Penetration Rates of Pay TV Services
from Q1 2019 to Q1 2020**



**PAY TV
PENETRATION PER
100 HOUSEHOLDS**

60.7



**Y-O-Y
PERCENT CHANGE**

0.5%



**Q-O-Q
PERCENT CHANGE**

-1.3%

Pay TV Revenues



GROSS REVENUES

\$175m



Y-o-Y
PERCENT CHANGE

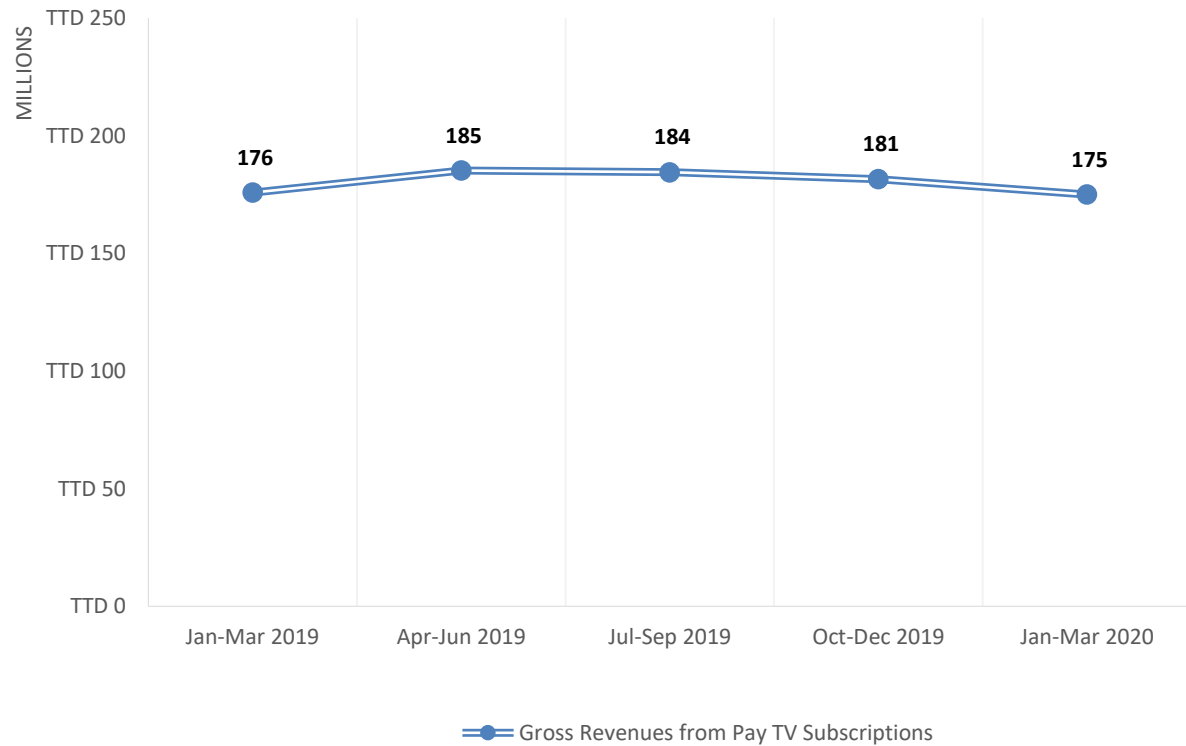
-0.5%



Q-o-Q
PERCENT CHANGE

-3.6%

GROSS REVENUES FROM PAY TV SERVICES
FROM Q1 2019 TO Q1 2020





HHI

3,154.8



Y-o-Y
PERCENT CHANGE

2.4%

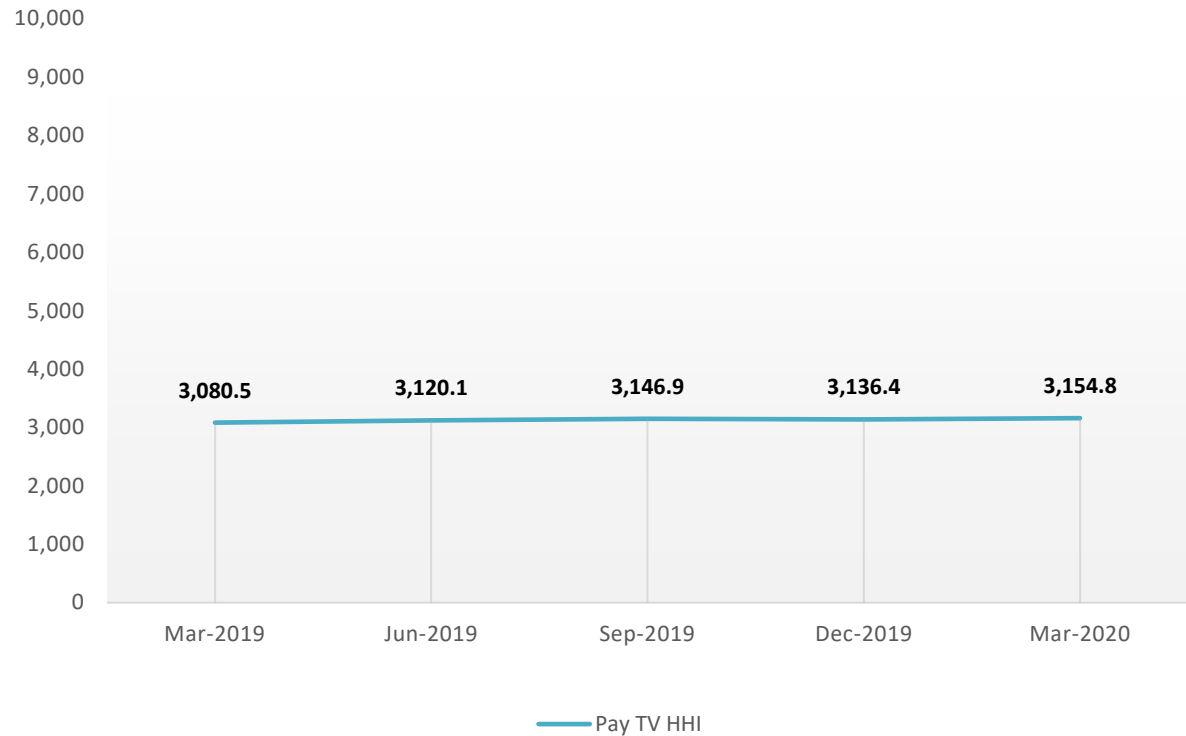


Q-o-Q
PERCENT CHANGE

0.6%

Pay TV HHI

HHI for Pay TV Services
from Q1 2019 to Q1 2020



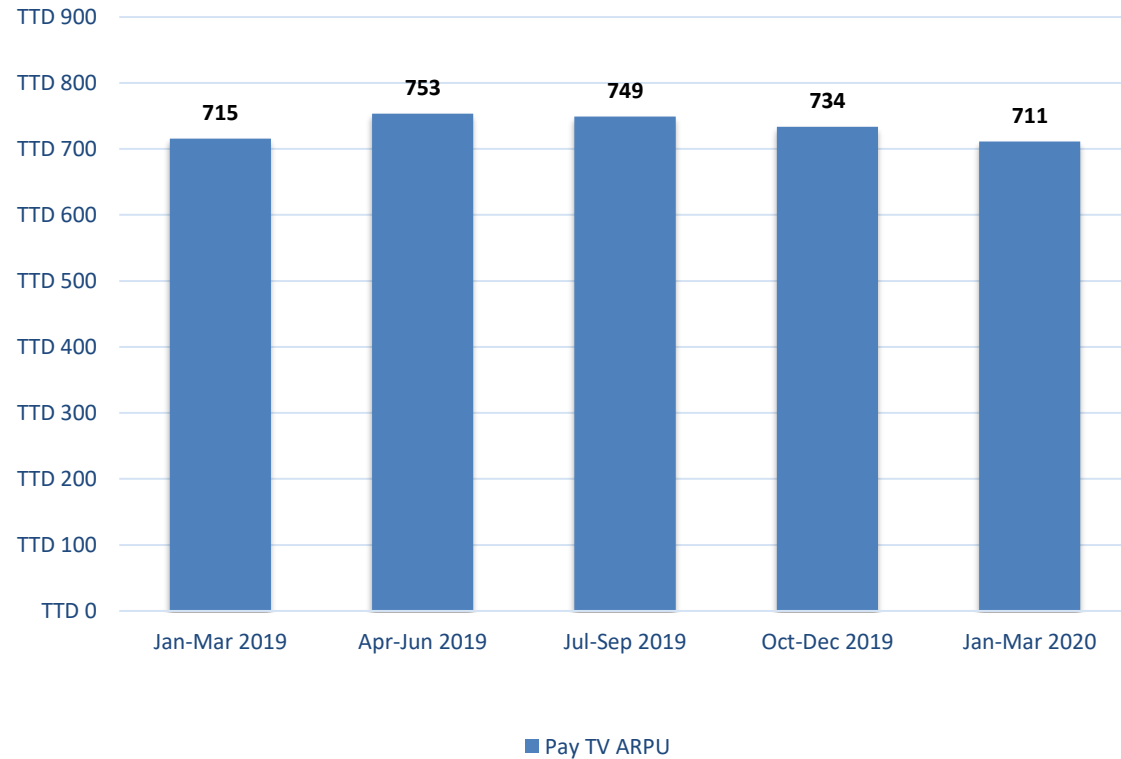
Pay TV

Average Revenue Per User

ARPU

\$
\$711

ARPU for Pay TV Services
from Q1 2019 to Q1 2020



Y-o-Y
PERCENT CHANGE

-0.6%

Q-o-Q
PERCENT CHANGE

-3.1%

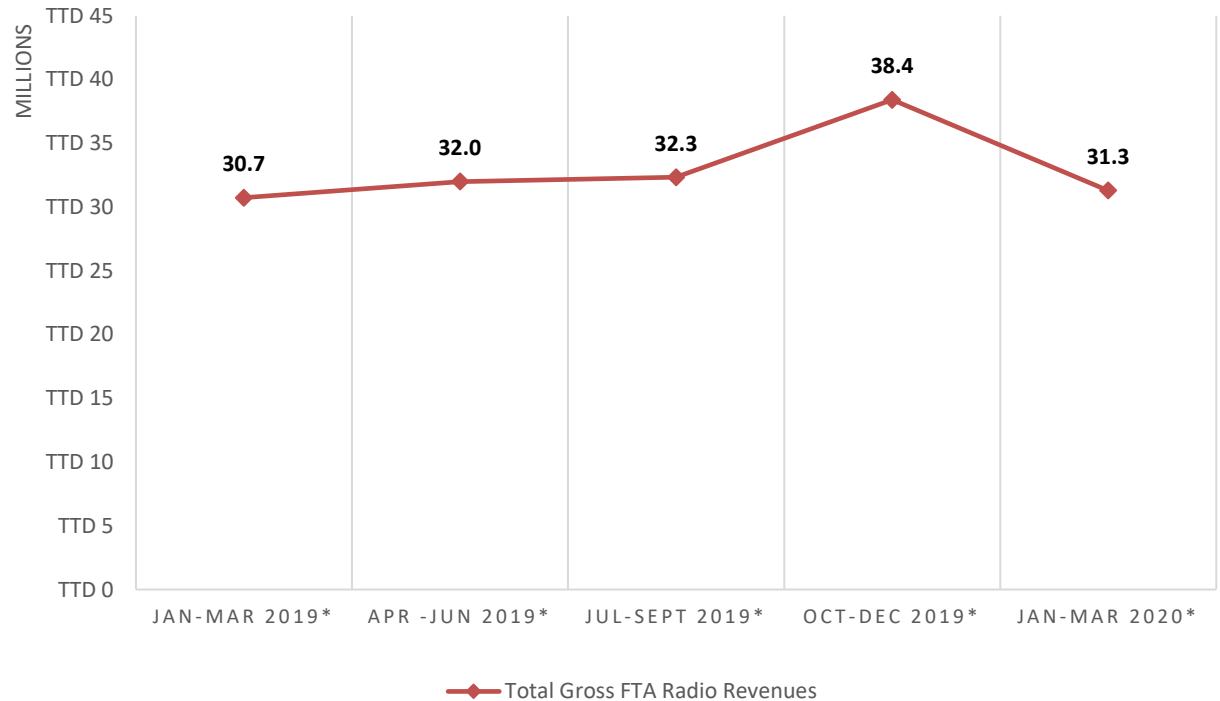
Free-to-Air Radio Revenues

\$ GROSS REVENUES
\$31.3m

Y-o-Y
PERCENT CHANGE
1.9%

Q-o-Q
PERCENT CHANGE
-18.5%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES
FROM Q1 2019 TO Q1 2020



- **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

474



Y-o-Y
PERCENT CHANGE

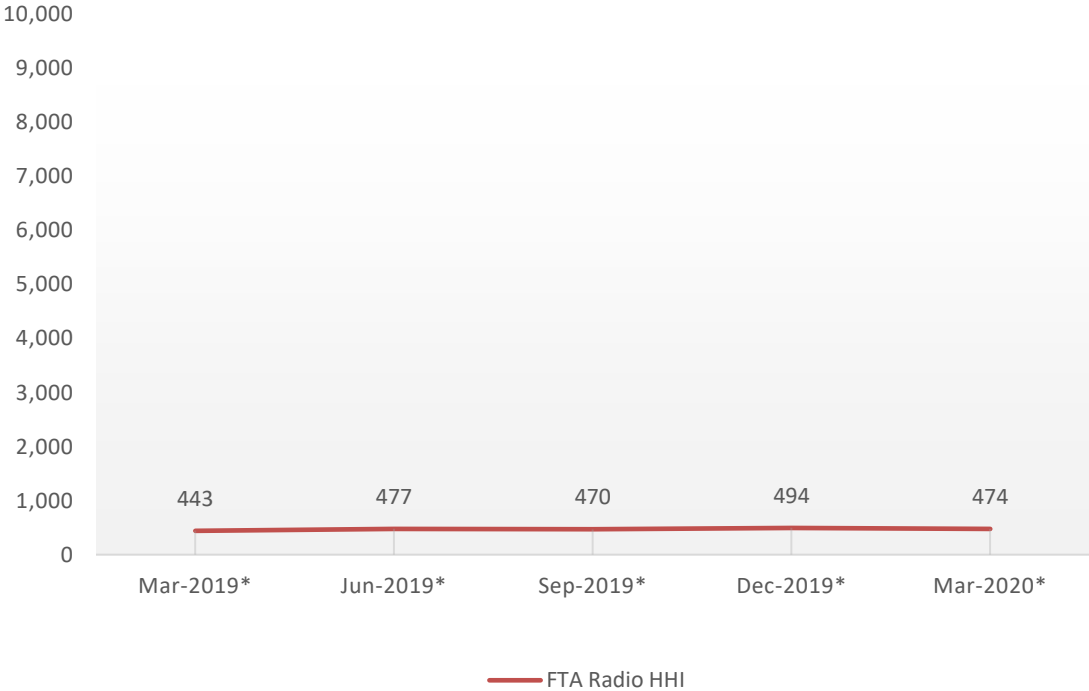
7.0%



Q-o-Q
PERCENT CHANGE

-4.0%

HHI for Free to Air Radio Services
from Q1 2019 to Q1 2020



- *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*

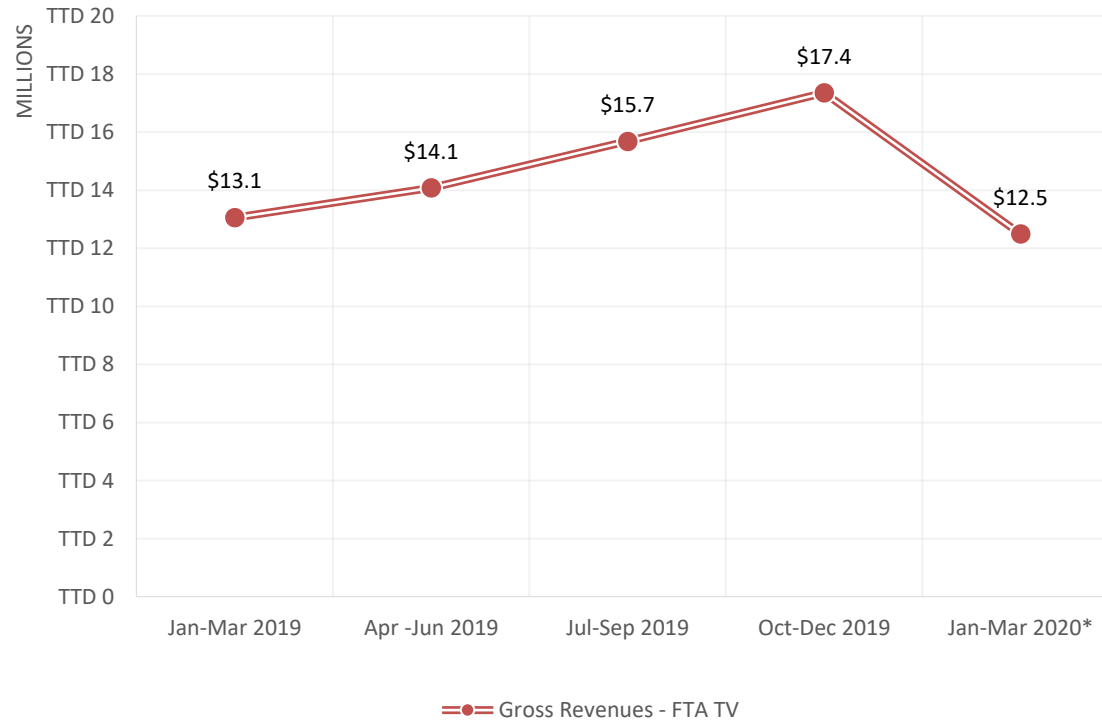
Free-to-Air TV Revenues

\$ GROSS REVENUES
\$12.5m

Y-o-Y
PERCENT CHANGE
-4.3%

Q-o-Q
PERCENT CHANGE
-28.0%

GROSS REVENUES FROM FREE TO AIR TV SERVICES
FROM Q1 2019 TO Q1 2020



- **Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network Television, and Synergy Entertainment Network Limited.**

Free-to-Air TV HHI



HHI

3,146



Y-o-Y

PERCENT CHANGE

-7.5%

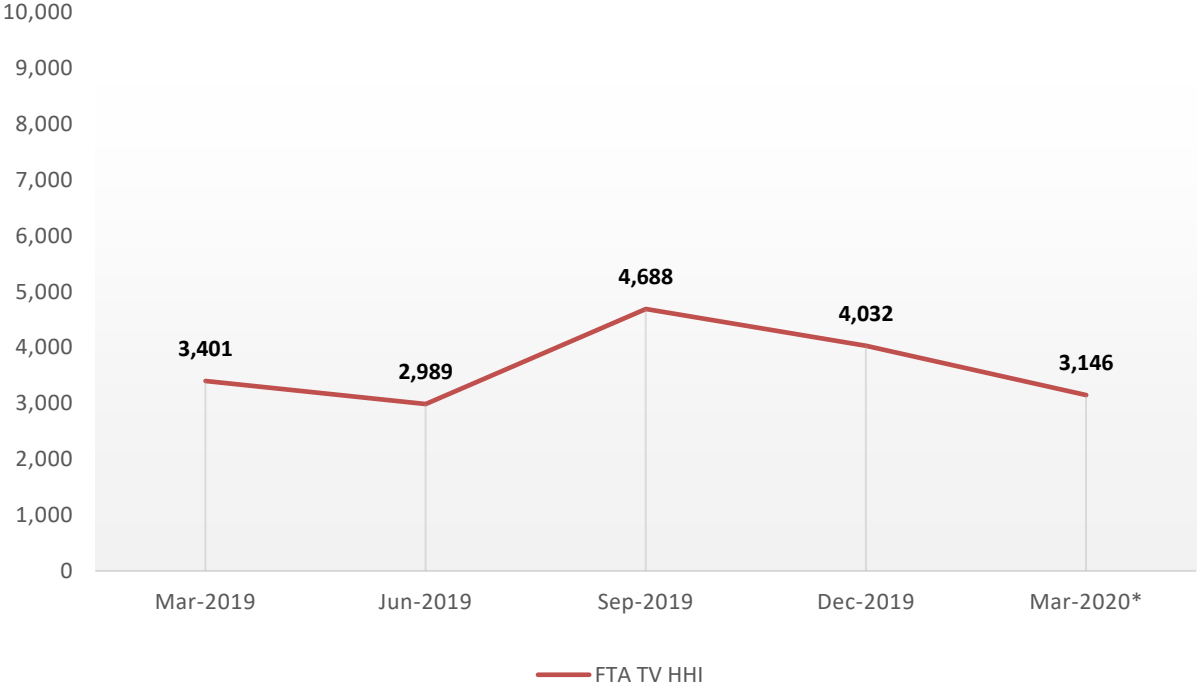


Q-o-Q

PERCENT CHANGE

-22.0%

HHI for Free to Air TV Services
from Q1 2019 to Q1 2020



• Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network Television, and Synergy Entertainment Network Limited.



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