



QUARTERLY MARKET UPDATE

April to June 2020

Quarterly Market Update – Q2 2020

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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 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

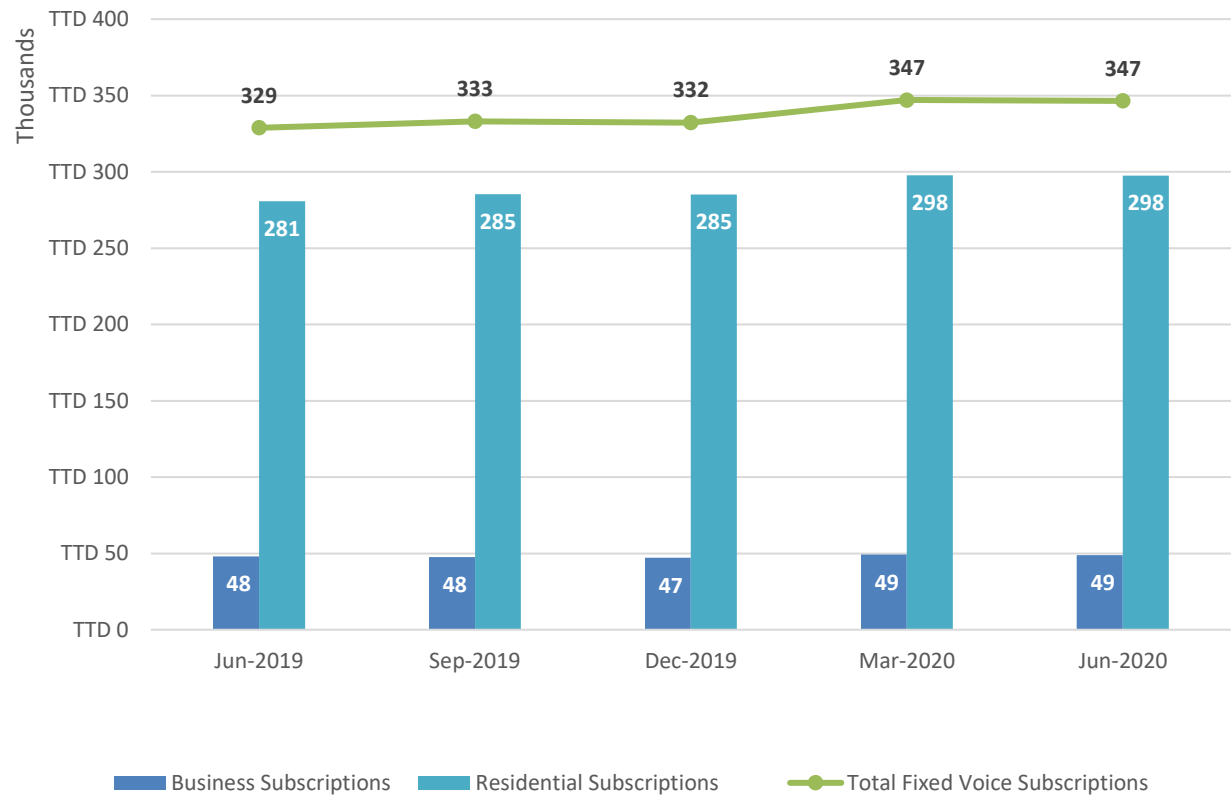
5.3%



Q-o-Q PERCENT CHANGE

-0.2%

Number of Fixed Line Subscriptions
Q2 2019 to Q2 2020



Fixed Voice Penetration

FIXED VOICE
PENETRATION PER
100 INHABITANTS

25.4

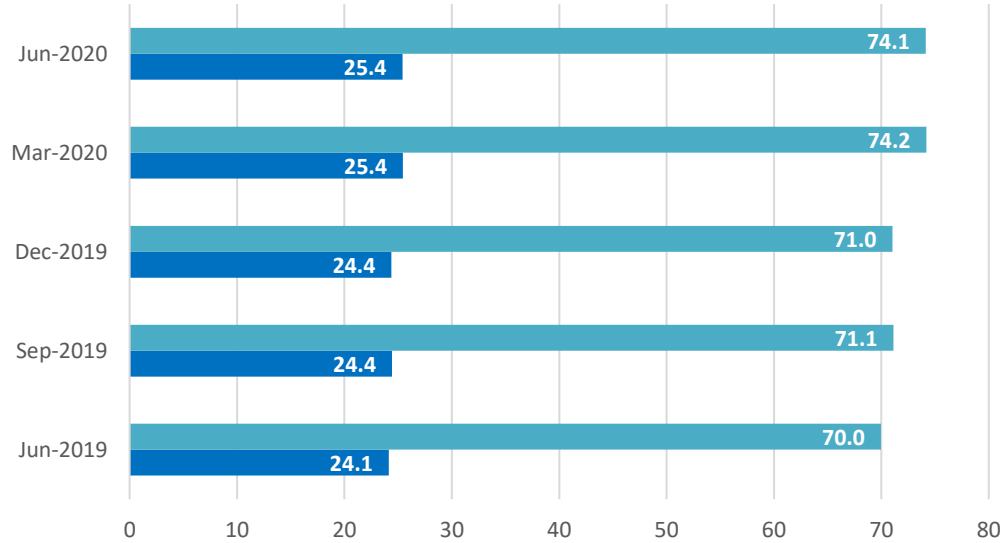
Y-o-Y
PERCENT CHANGE

5.4%

Q-o-Q
PERCENT CHANGE

-0.2%

Penetration Rate of Fixed Line Subscriptions
from Q2 2019 to Q2 2020



■ Fixed Voice Penetration (Household)

■ Fixed Voice Penetration (Population)

FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

74.1

Y-o-Y
PERCENT CHANGE

6%

Q-o-Q
PERCENT CHANGE

-0.1%

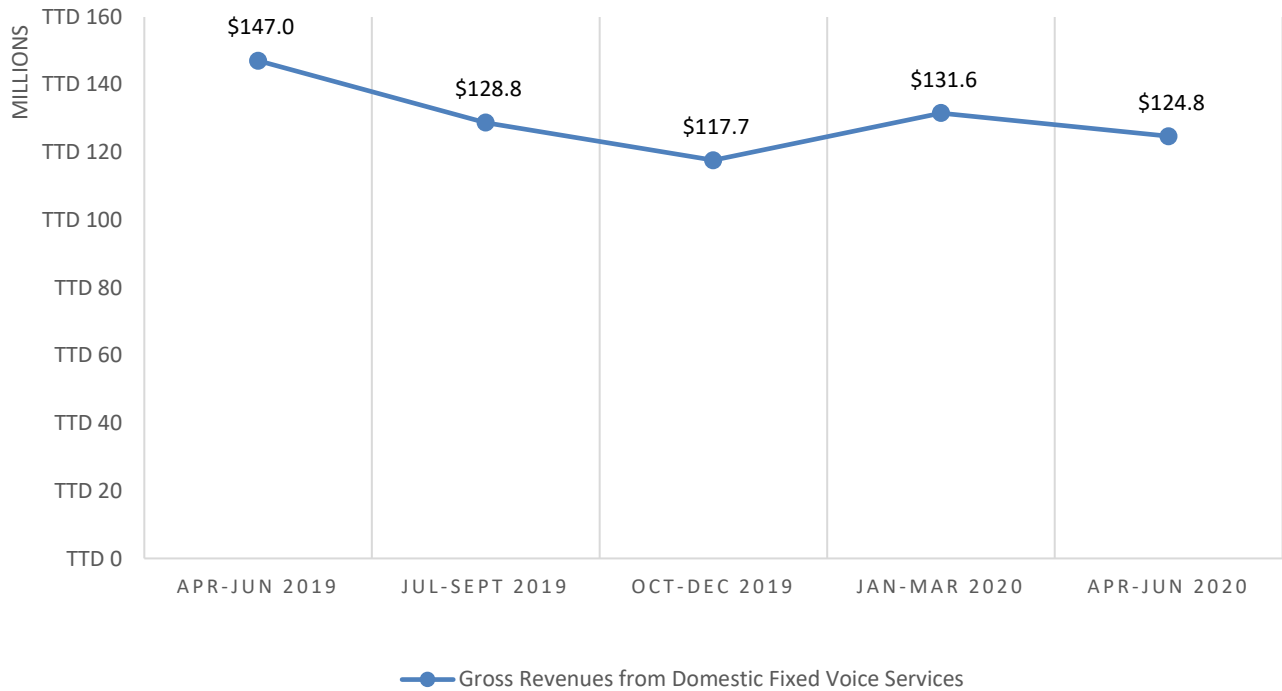
Fixed Voice Revenues



GROSS REVENUES

\$124.8m

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q2 2019 TO Q2 2020



Y-o-Y
PERCENT CHANGE

-15.2%



Q-o-Q
PERCENT CHANGE

-5.2%

Fixed Voice HHI



HHI

3,749



Y-o-Y
PERCENT CHANGE

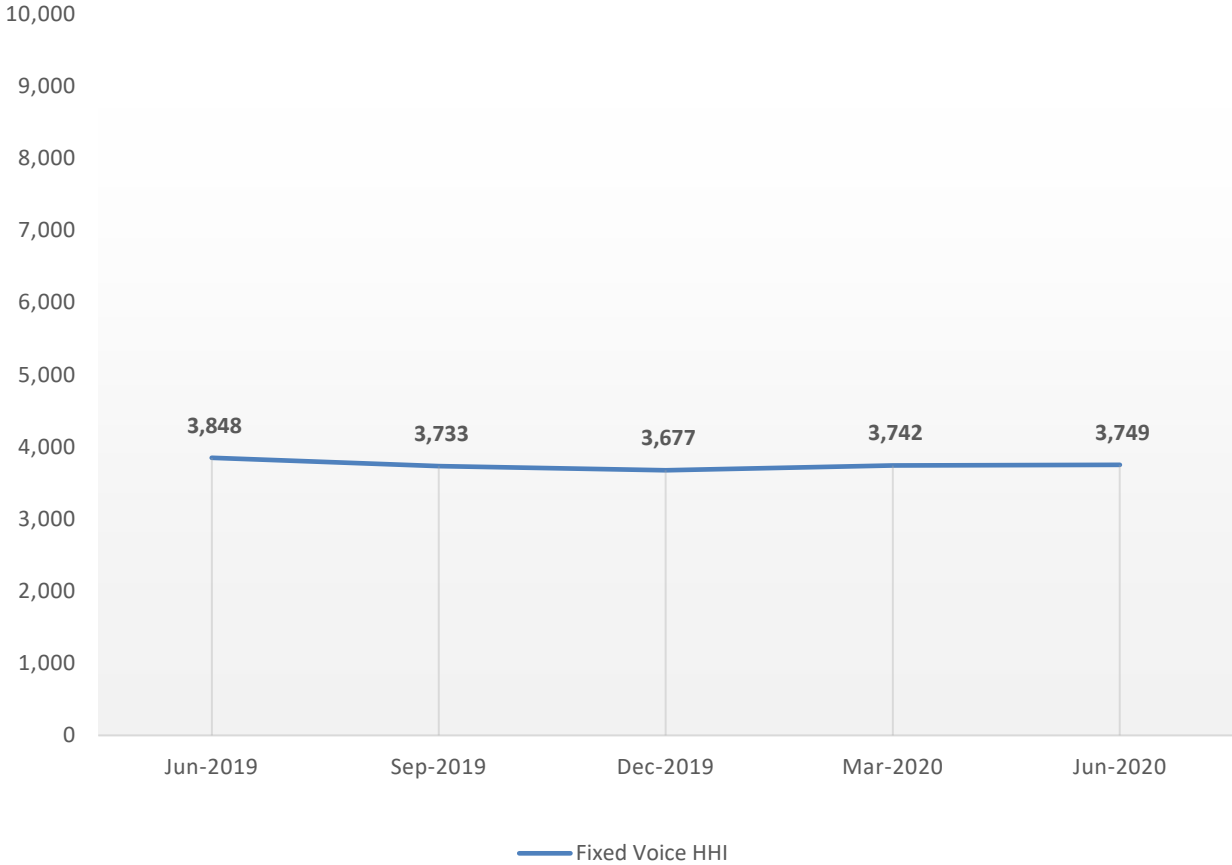
-2.6%



Q-o-Q
PERCENT CHANGE

0.2%

HHI for Domestic Fixed Line
from Q2 2019 to Q2 2020



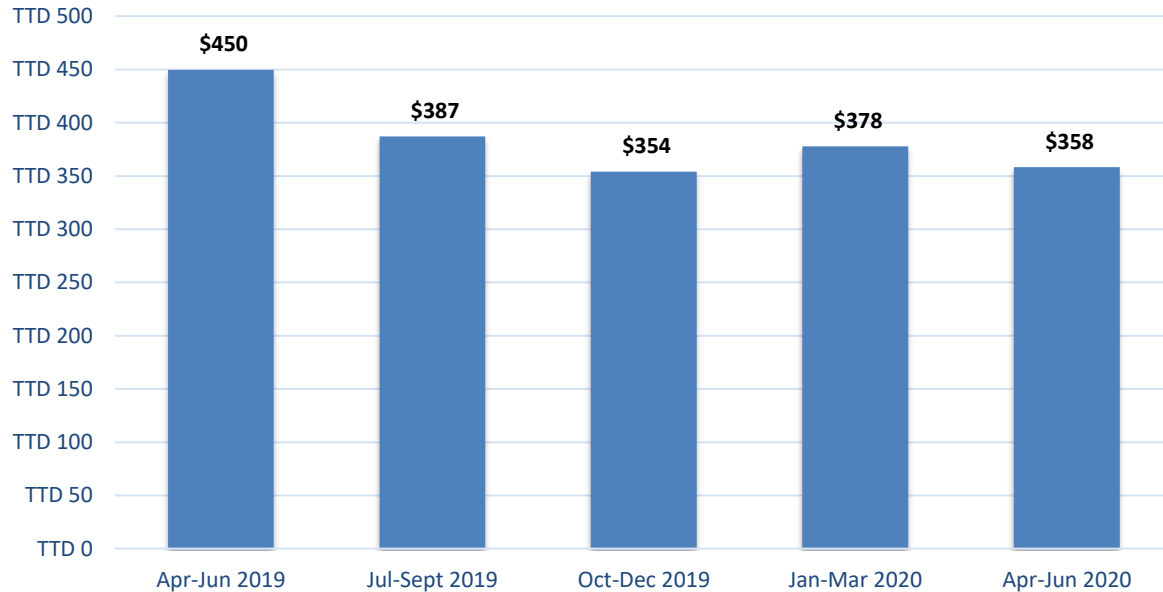
Fixed Voice Average Revenue Per User

ARPU



\$358

ARPU from Domestic Fixed Voice Services
from Q2 2019 to Q2 2020



■ ARPU from Domestic Fixed Voice Services

Y-o-Y
PERCENT CHANGE

-20.3%

Q-o-Q
PERCENT CHANGE

-5.2%

Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,981,000



Y-o-Y
PERCENT CHANGE

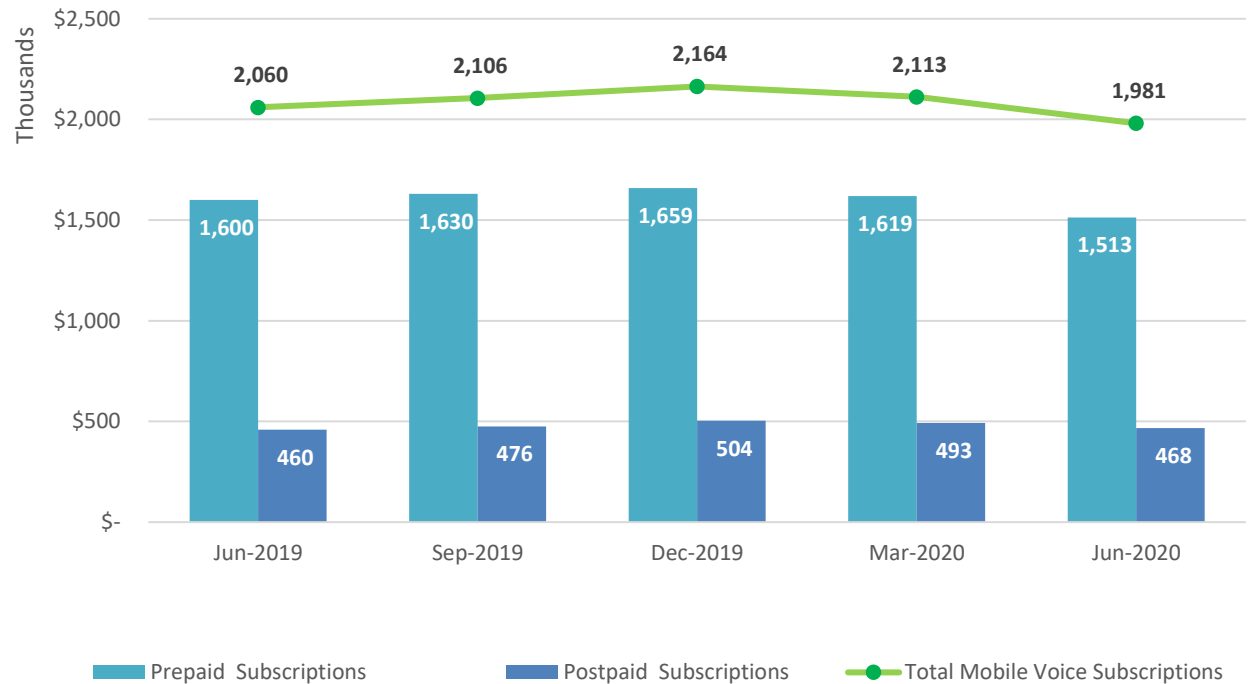
-3.8%



Q-o-Q
PERCENT CHANGE

-6.2%

Number of Mobile Voice Subscriptions
from Q2 2019 to Q2 2020



Mobile Voice Penetration

Penetration of Mobile Voice Subscriptions
from Q2 2019 to Q2 2020



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

145



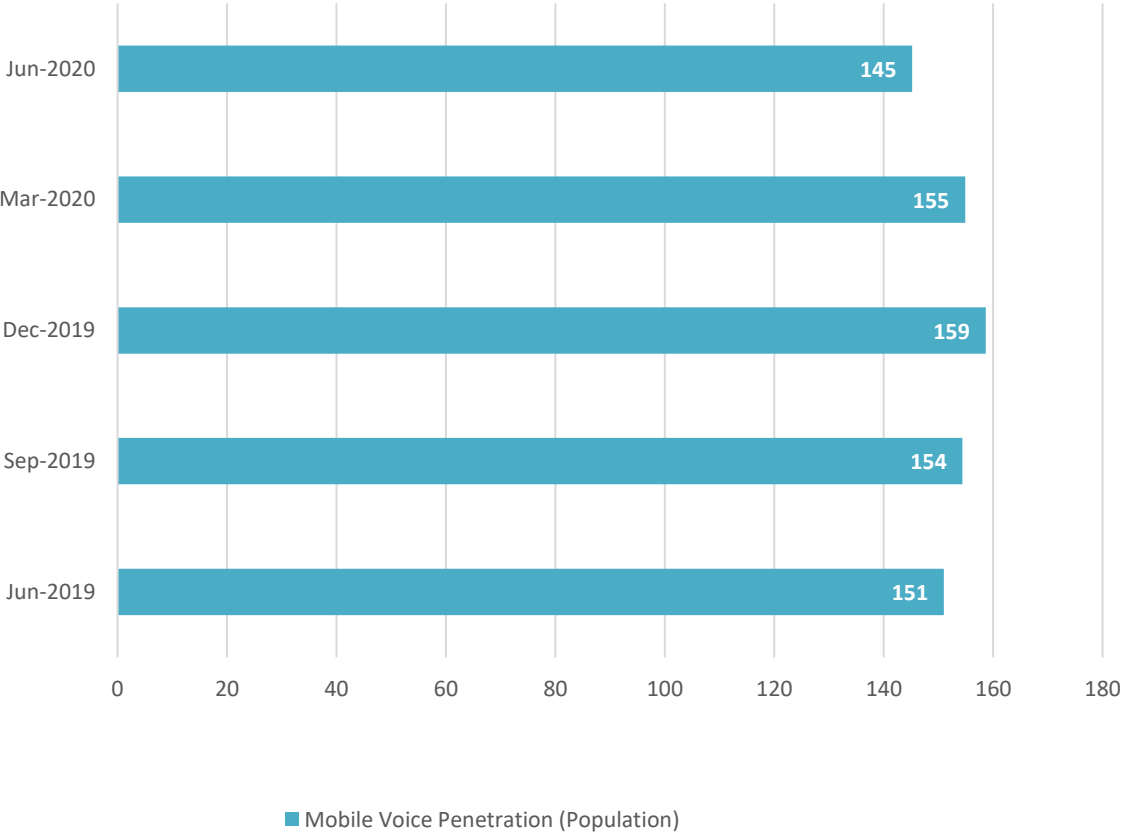
Y-o-Y
PERCENT CHANGE

-3.8%



Q-o-Q
PERCENT CHANGE

-6.2%



Mobile Services Revenues

\$

GROSS REVENUES

\$413m



Y-o-Y
PERCENT CHANGE

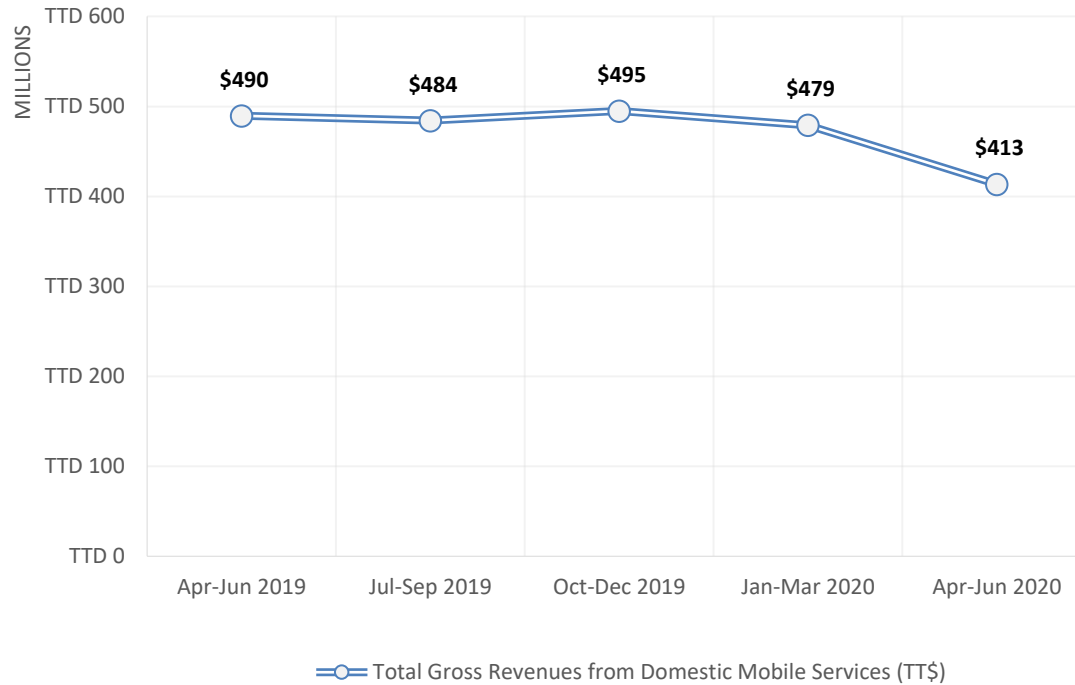
-15.6%



Q-o-Q
PERCENT CHANGE

-13.7%

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$)
FROM Q2 2019 TO Q2 2020



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,192



Y-o-Y
PERCENT CHANGE

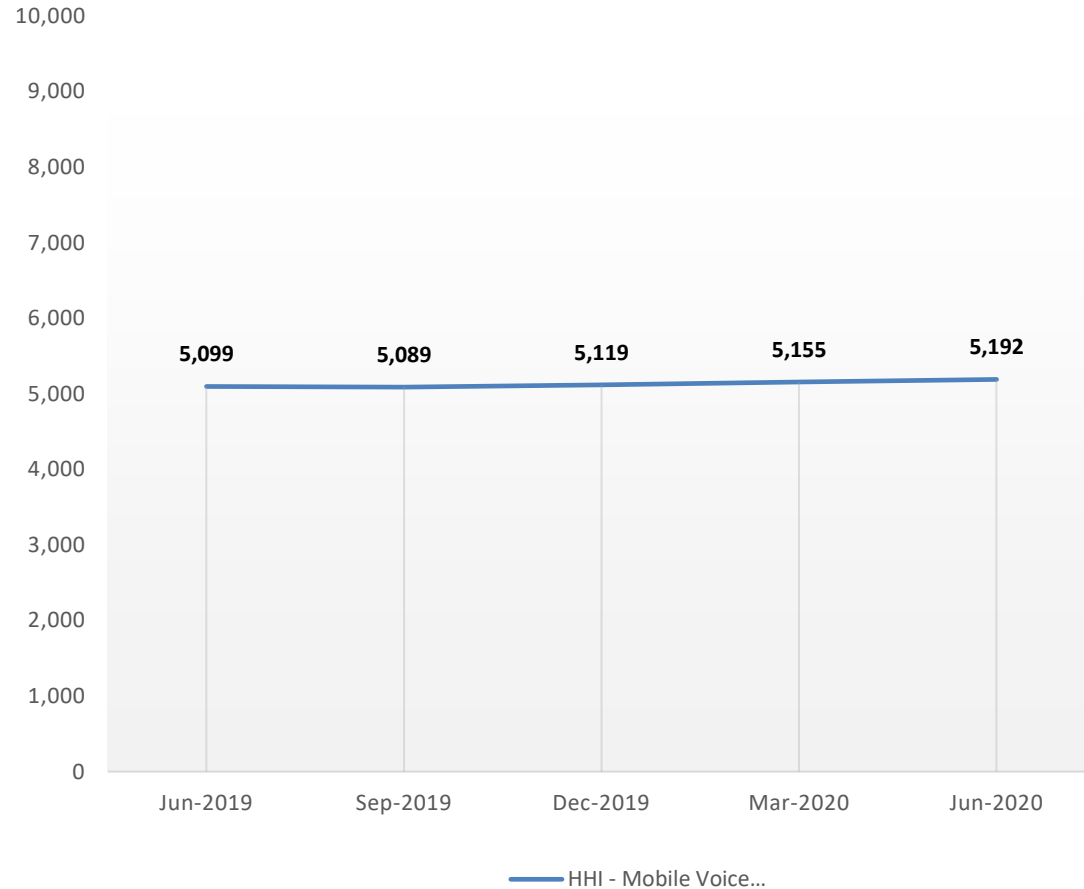
1.8%



Q-o-Q
PERCENT CHANGE

0.7%

HHI for Domestic Mobile Services
from Q2 2019 to Q2 2020



Average Revenue Per User

Mobile Services



ARPU

\$205



Y-o-Y
PERCENT CHANGE

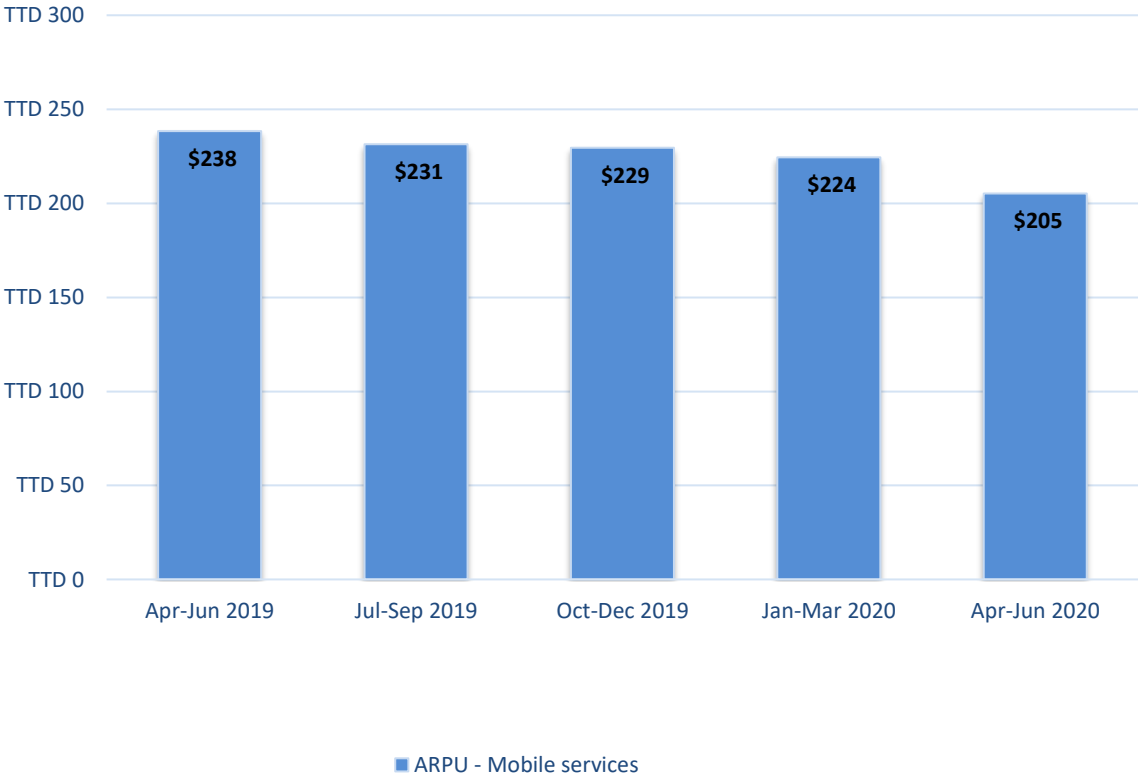
-13.9%



Q-o-Q
PERCENT CHANGE

-8.5%

ARPU for Domestic Mobile Services
from Q2 2019 to Q2 2020



Fixed Broadband Subscriptions

TOTAL NUMBER OF SUBSCRIPTIONS

351,400

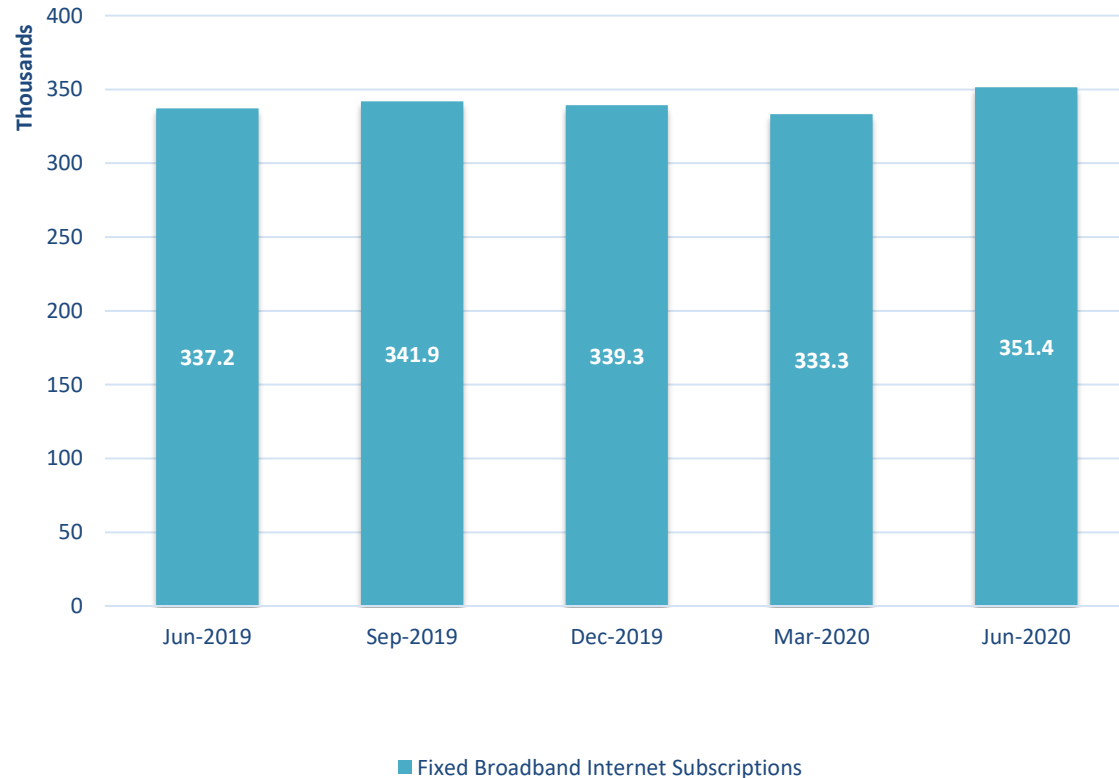
Y-o-Y PERCENT CHANGE

4.2%

Q-o-Q PERCENT CHANGE

5.5%

Number of Fixed Broadband Internet Subscriptions from Q2 2019 to Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Fixed Internet Penetration



**FIXED INTERNET
PENETRATION PER
100 INHABITANTS**

25.8



**Y-o-Y
PERCENT CHANGE**

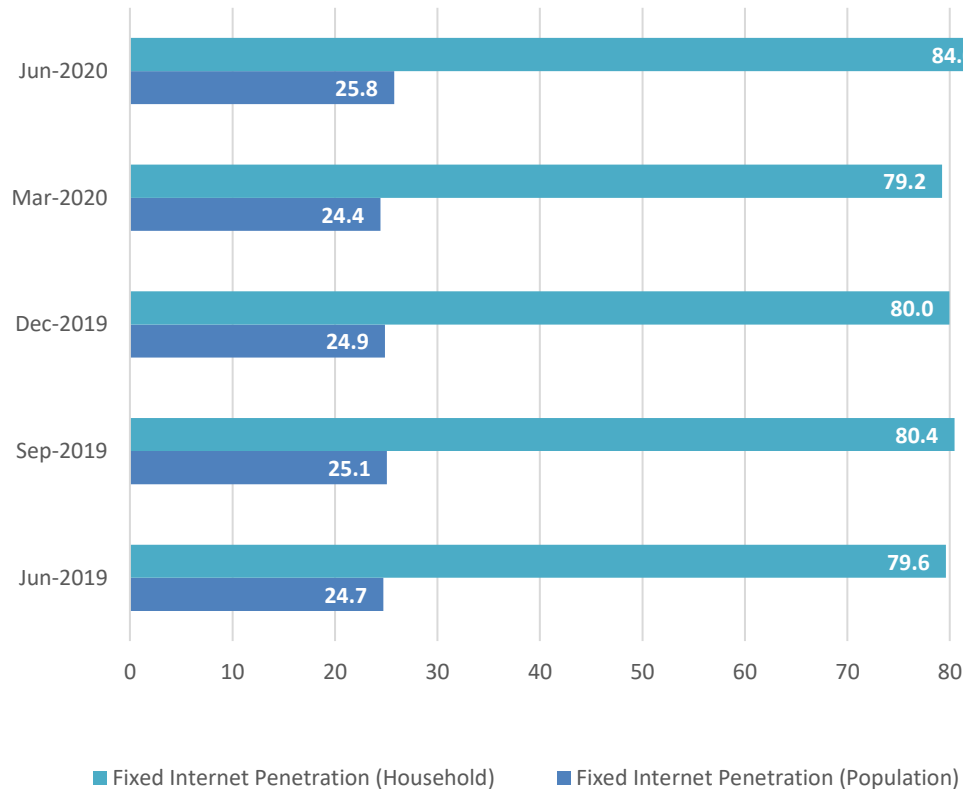
4.2%



**Q-o-Q
PERCENT CHANGE**

5.5%

Penetration for Fixed Internet Subscriptions
from Q2 2019 to Q2 2020



**FIXED INTERNET
PENETRATION PER
100 HOUSEHOLDS**

84



**Y-O-Y
PERCENT CHANGE**

5.5%



**Q-O-Q
PERCENT CHANGE**

6.0%

**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Mobile Internet Penetration



MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

52



Y-o-Y
PERCENT CHANGE

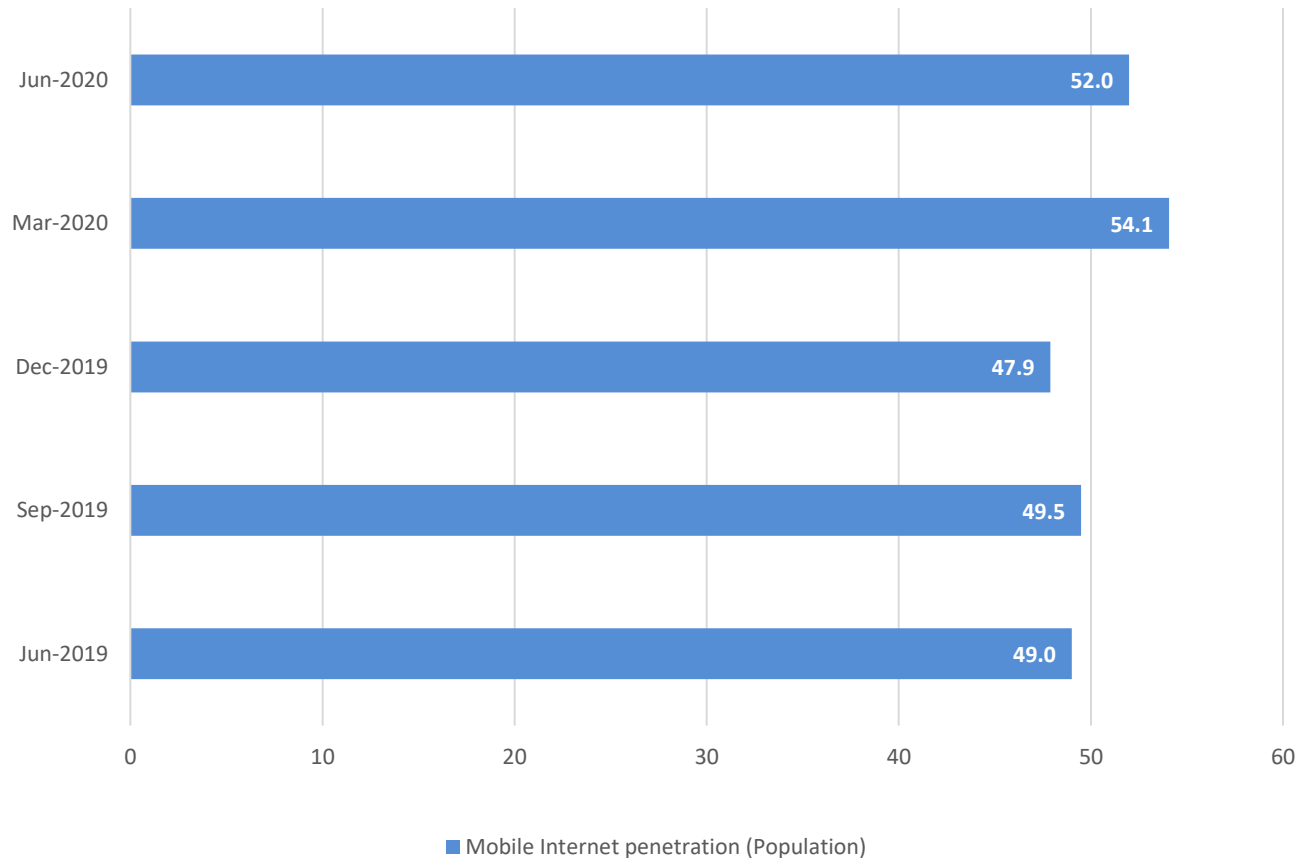
6.1%



Q-o-Q
PERCENT CHANGE

-3.8%

Penetration for Mobile Internet Subscriptions
from Q2 2019 to Q2 2020



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

Fixed Internet Revenues



GROSS REVENUES

\$331.7m



Y-o-Y
PERCENT CHANGE

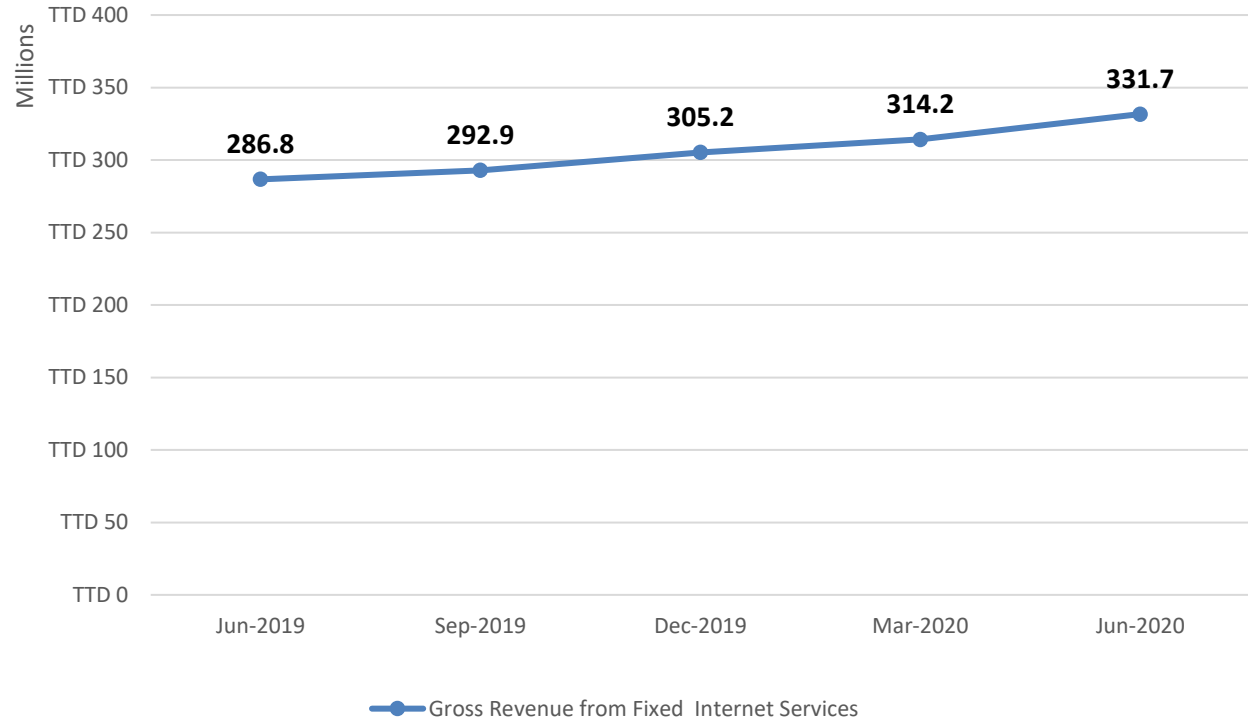
15.7%



Q-o-Q
PERCENT CHANGE

5.5%

Gross Revenues from Fixed Internet Services
from Q2 2019 to Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Fixed Internet HHI



HHI

2,931



Y-o-Y
PERCENT CHANGE

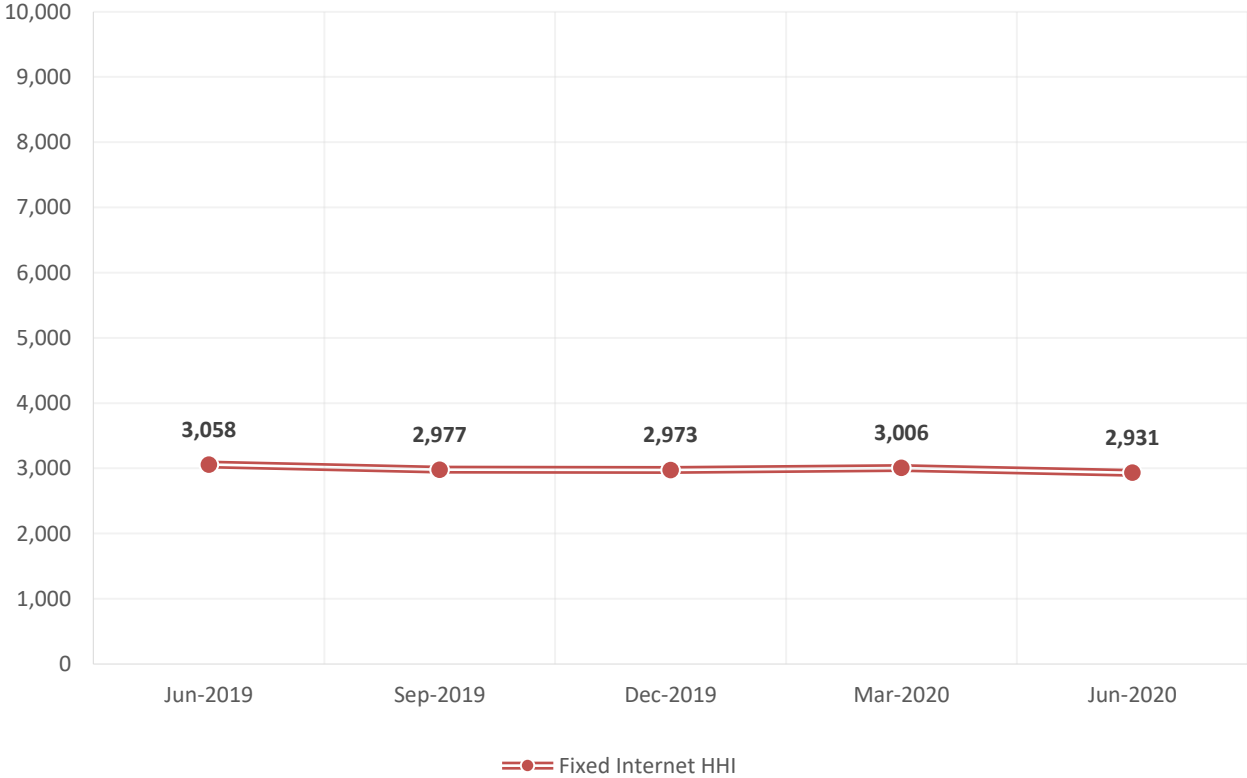
-4.1%



Q-o-Q
PERCENT CHANGE

-2.5%

HHI FOR FIXED INTERNET SERVICES
FROM Q2 2019 TO Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Fixed Internet Average Revenue Per User

ARPU

\$

\$939

Y-o-Y

PERCENT CHANGE

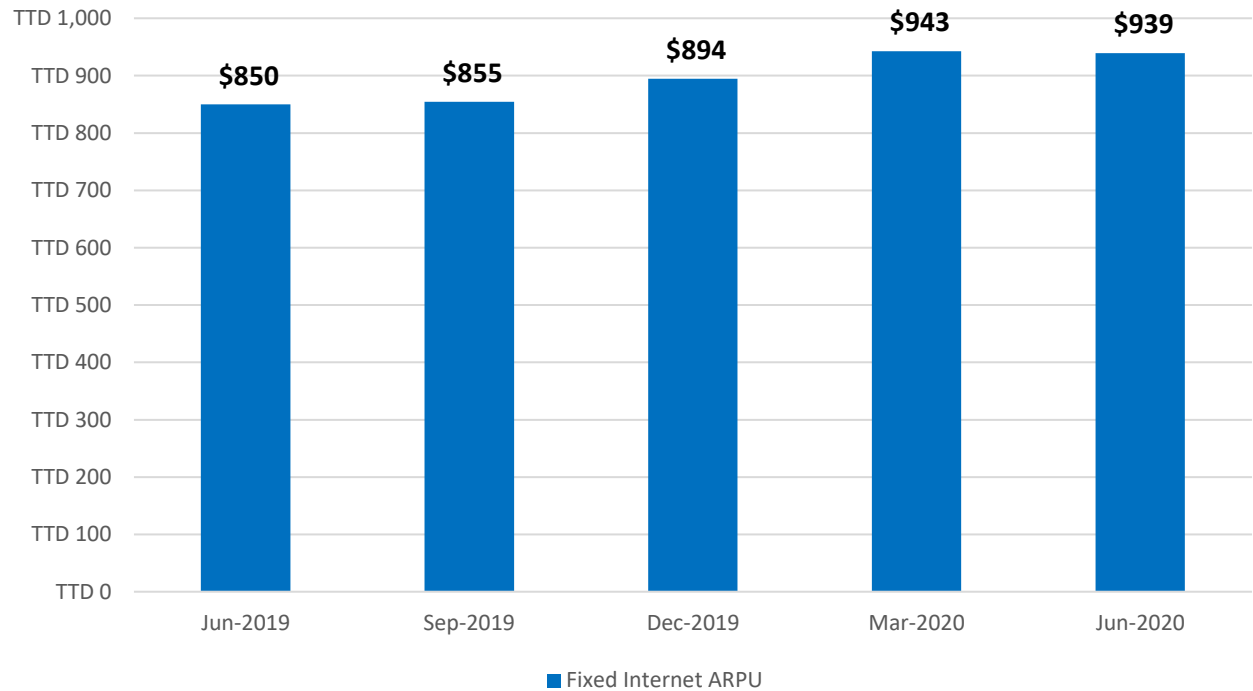
10.5%

Q-o-Q

PERCENT CHANGE

-0.4%

ARPU for Fixed Internet Services
from Q2 2019 to Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

240,700



Y-o-Y PERCENT CHANGE

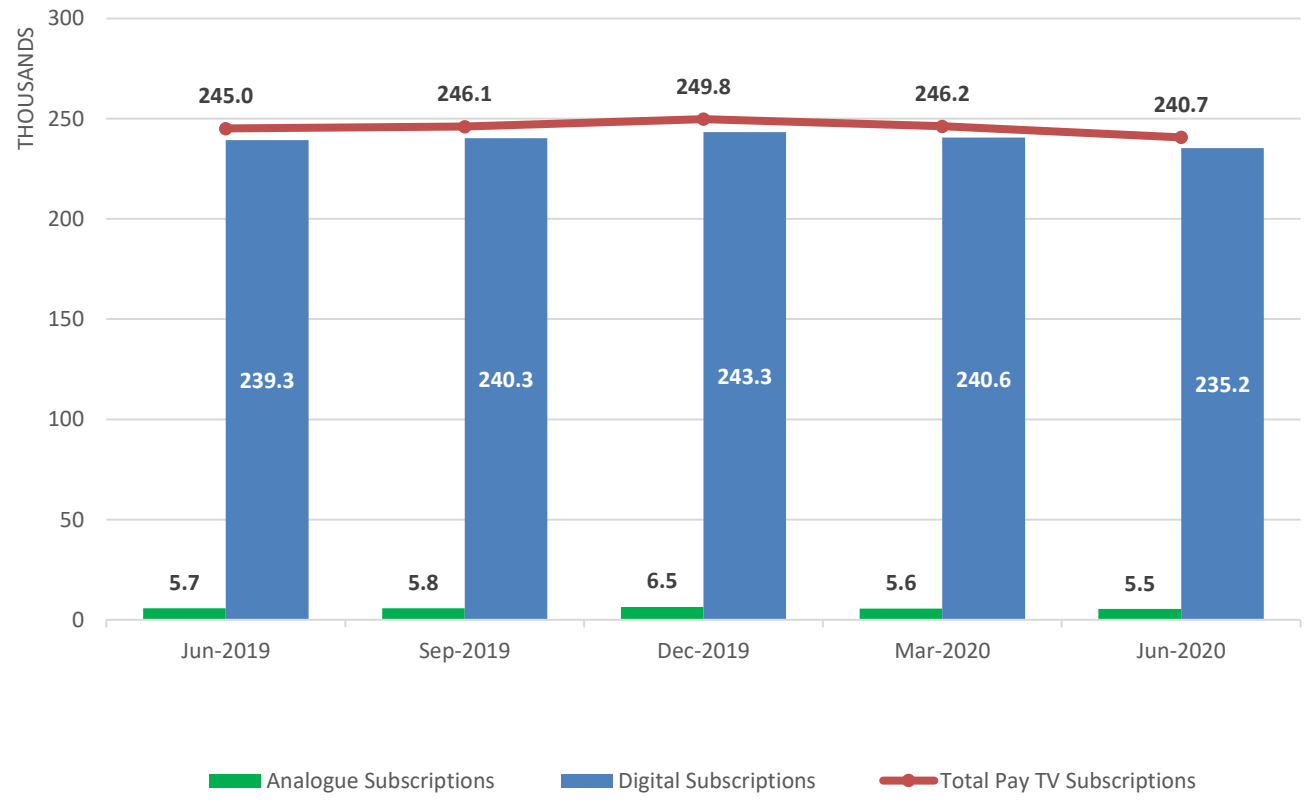
-1.8%



Q-o-Q PERCENT CHANGE

-2.2%

Number of Pay TV Subscriptions from Q2 2019 to Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Pay TV Penetration



**PAY TV
PENETRATION PER
100 INHABITANTS**

17.5



**Y-o-Y
PERCENT CHANGE**

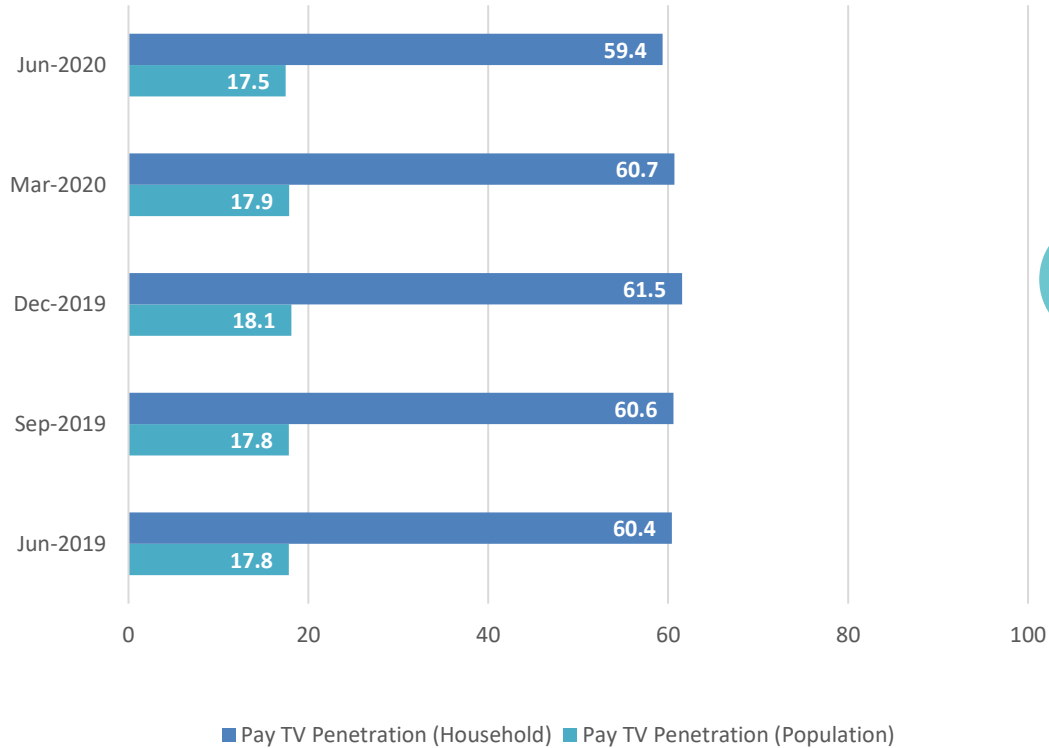
-2.0%



**Q-o-Q
PERCENT CHANGE**

-2.2%

**Penetration Rates of Pay TV Services
from Q2 2019 to Q2 2020**



**PAY TV
PENETRATION PER
100 HOUSEHOLDS**

59.4



**Y-o-Y
PERCENT CHANGE**

-1.7%



**Q-o-Q
PERCENT CHANGE**

-2.2%

**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Pay TV Revenues



GROSS REVENUES

\$175m



Y-o-Y
PERCENT CHANGE

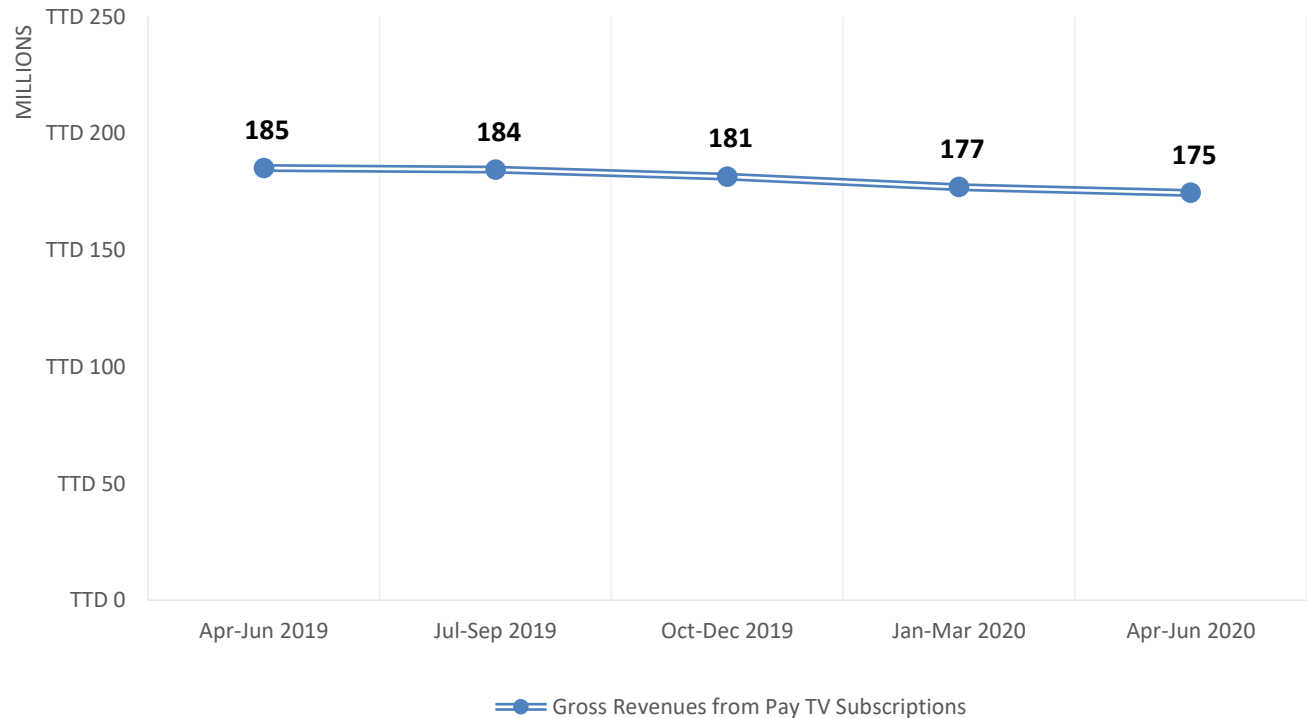
-5.7%



Q-o-Q
PERCENT CHANGE

-1.4%

GROSS REVENUES FROM PAY TV SERVICES
FROM Q2 2019 TO Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*



HHI

3,179.8



Y-o-Y
PERCENT CHANGE

1.9%

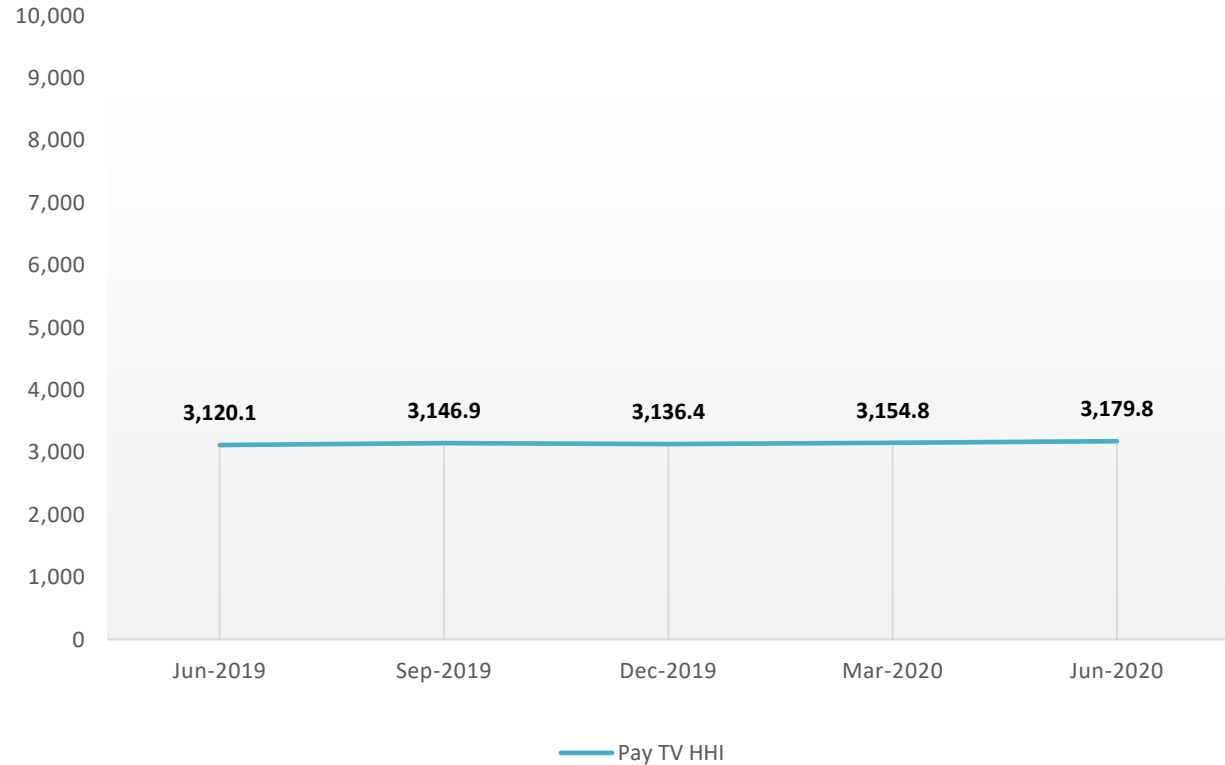


Q-o-Q
PERCENT CHANGE

0.8%

Pay TV HHI

HHI for Pay TV Services
from Q2 2019 to Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

Pay TV

Average Revenue Per User

ARPU

\$
\$724

Y-o-Y

PERCENT CHANGE

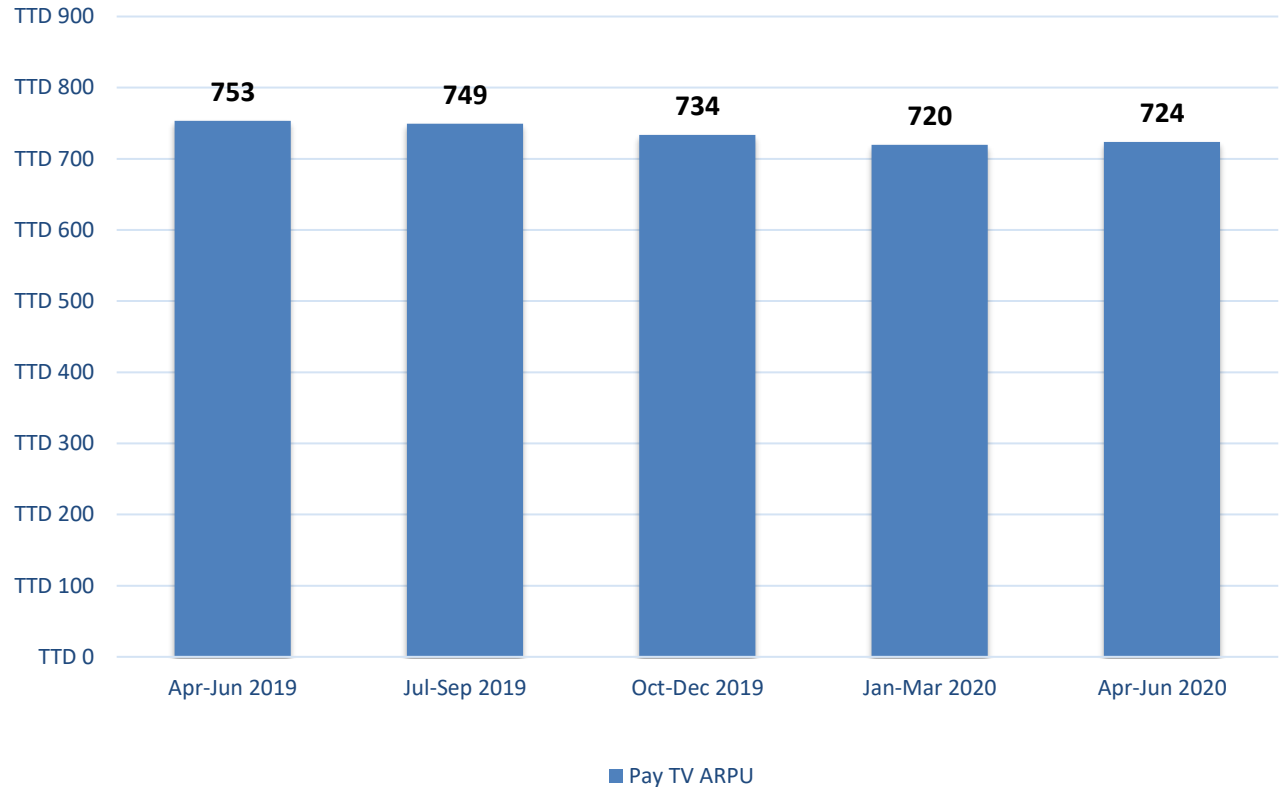
-3.9%

Q-o-Q

PERCENT CHANGE

0.6%

ARPU for Pay TV Services
from Q2 2019 to Q2 2020



**Data estimated for the following concessionaire who did not submit any data at the date of publication: Greendot Apr-Jun 2020*

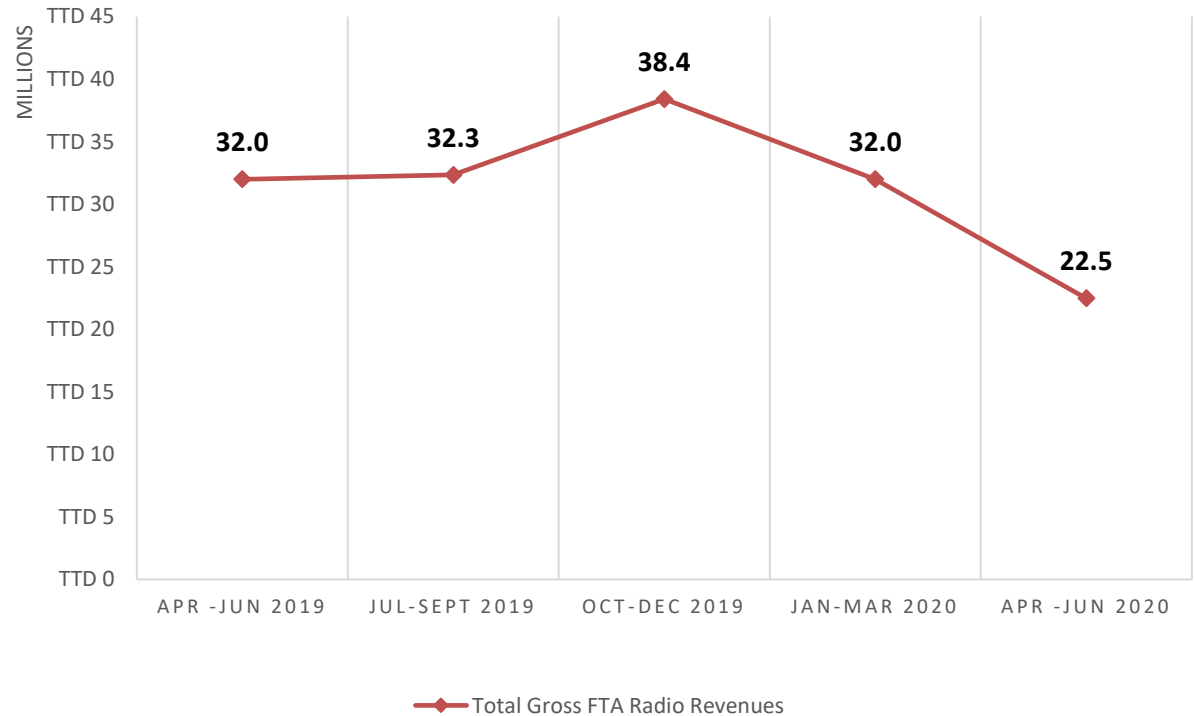
Free-to-Air Radio Revenues

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES
FROM Q2 2019 TO Q2 2020

\$ GROSS REVENUES
\$22.5m

Y-o-Y
PERCENT CHANGE
-29.7%

Q-o-Q
PERCENT CHANGE
-29.8%



** Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca Productions Limited, Trinibashment Limited, Radio Toco, Upward Trend Entertainment Limited and TTRN*

Free-to-Air Radio HHI



HHI

468



Y-o-Y
PERCENT CHANGE

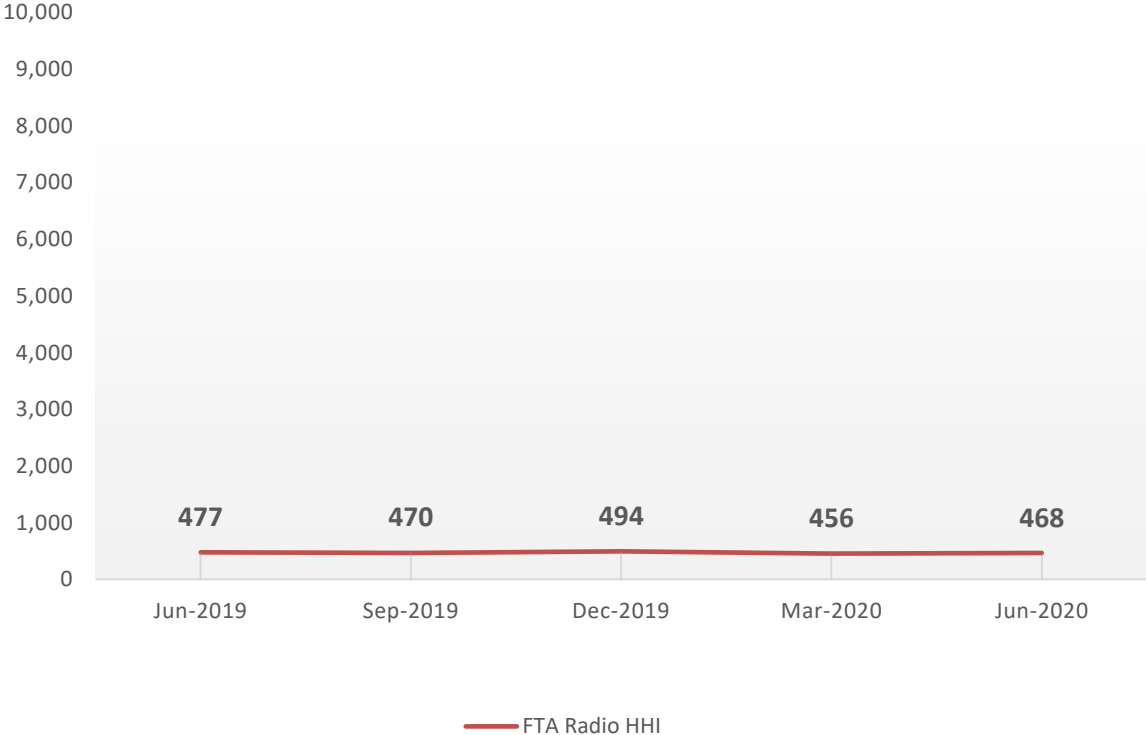
-1.8%



Q-o-Q
PERCENT CHANGE

2.8%

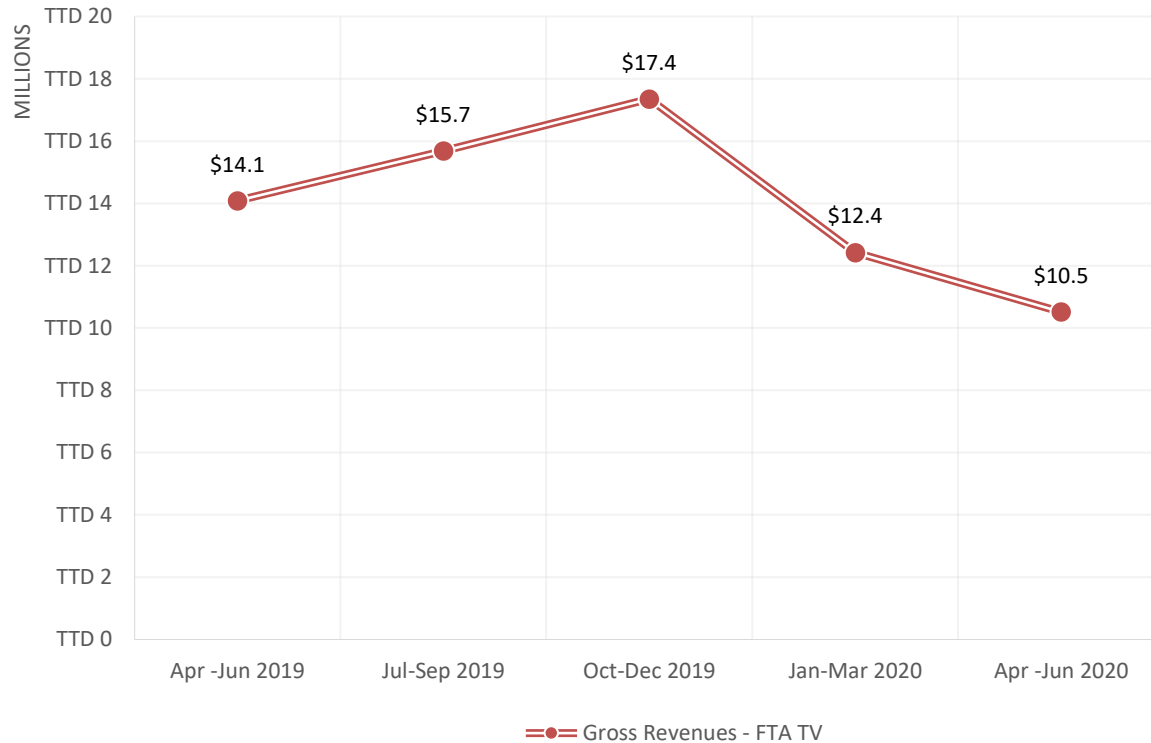
HHI for Free to Air Radio Services
from Q2 2019 to Q2 2020



• *Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca Productions Limited, Trinibashment Limited, Radio Toco, Upward Trend Entertainment Limited and TTRN*

Free-to-Air TV Revenues

GROSS REVENUES FROM FREE TO AIR TV SERVICES
FROM Q2 2019 TO Q2 2020



\$ GROSS REVENUES
\$10.5m

Y-o-Y
PERCENT CHANGE
-25.3%

Q-o-Q
PERCENT CHANGE
-15.3%

- **Data estimated for the following concessionaire who had not submitted data at the date of publication: SWAHA Media Ltd, Apr-Jun 2020**

Free-to-Air TV HHI



HHI

3,035



Y-o-Y
PERCENT CHANGE

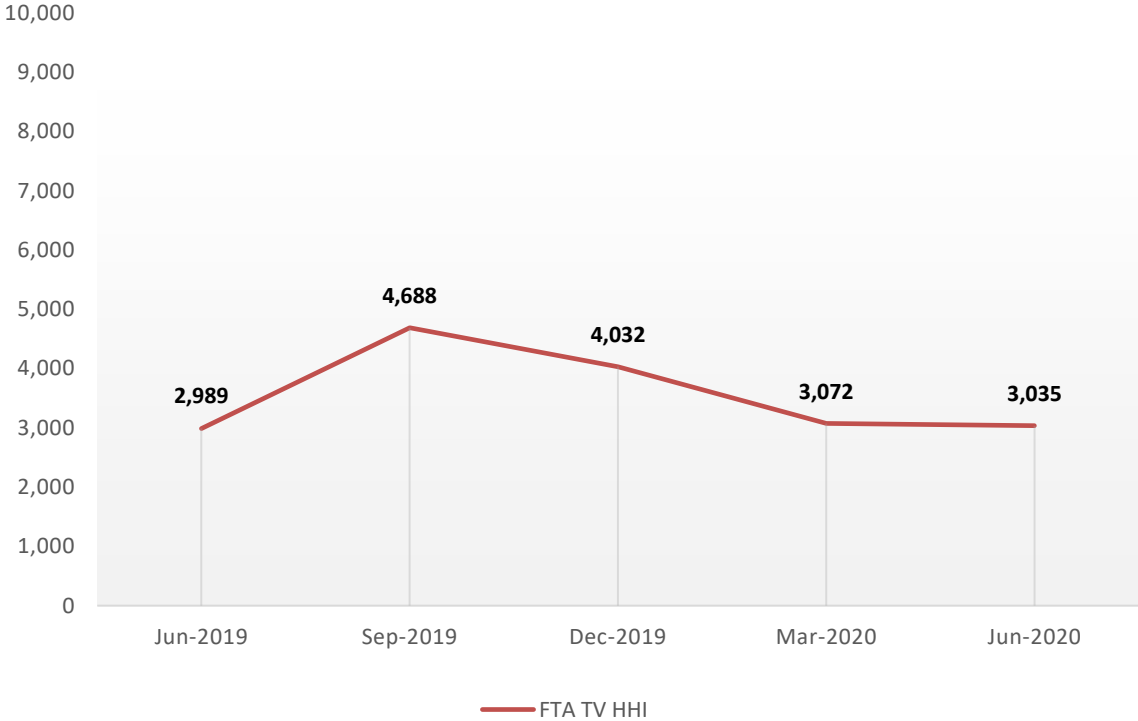
1.6%



Q-o-Q
PERCENT CHANGE

-1.2%

HHI for Free to Air TV Services
from Q2 2019 to Q2 2020



- Data estimated for the following concessionaires who had not submitted data at the date of publication: SWAHA Media Ltd.



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