



QUARTERLY MARKET UPDATE

January to March 2019

Quarterly Market Update – Q1 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

320,000



Y-o-Y PERCENT CHANGE

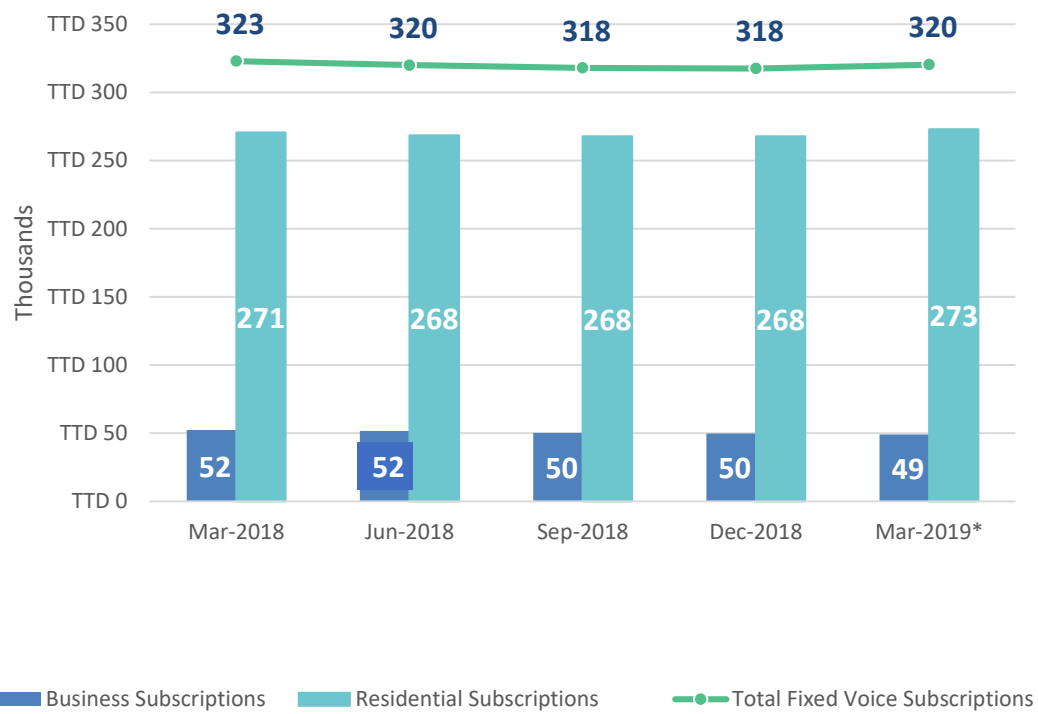
-0.9%



Q-o-Q PERCENT CHANGE

0.6%

Number of Fixed Line Subscriptions
Q1 2018 to Q1 2019



• Data estimated for the following concessionaire who had not submitted data at the date of publication: **Amplia Communications Limited**

Fixed Voice Penetration

FIXED VOICE
PENETRATION PER
100 INHABITANTS

23.6

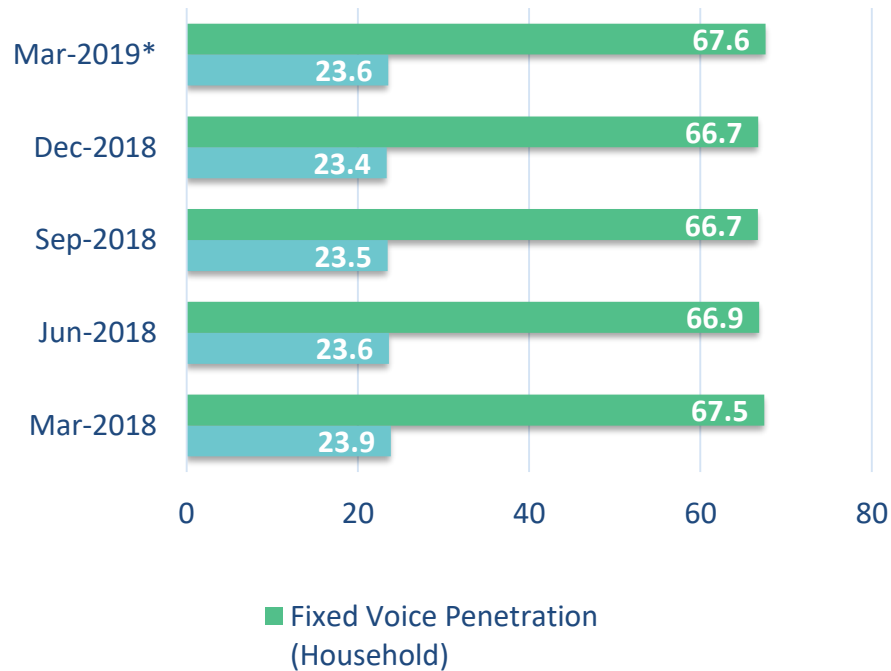
Y-o-Y
PERCENT CHANGE

-1.3%

Q-o-Q
PERCENT CHANGE

0.9%

Penetration Rate of Fixed Line Subscriptions
from Q1 2018 to Q1 2019



FIXED LINE
PENETRATION PER
100 HOUSEHOLDS

67.6

Y-o-Y
PERCENT CHANGE

0.1%

Q-o-Q
PERCENT CHANGE

1.3%

- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Amplia Communications Limited*

Fixed Voice Revenues



GROSS REVENUES

\$132.3m



Y-o-Y
PERCENT CHANGE

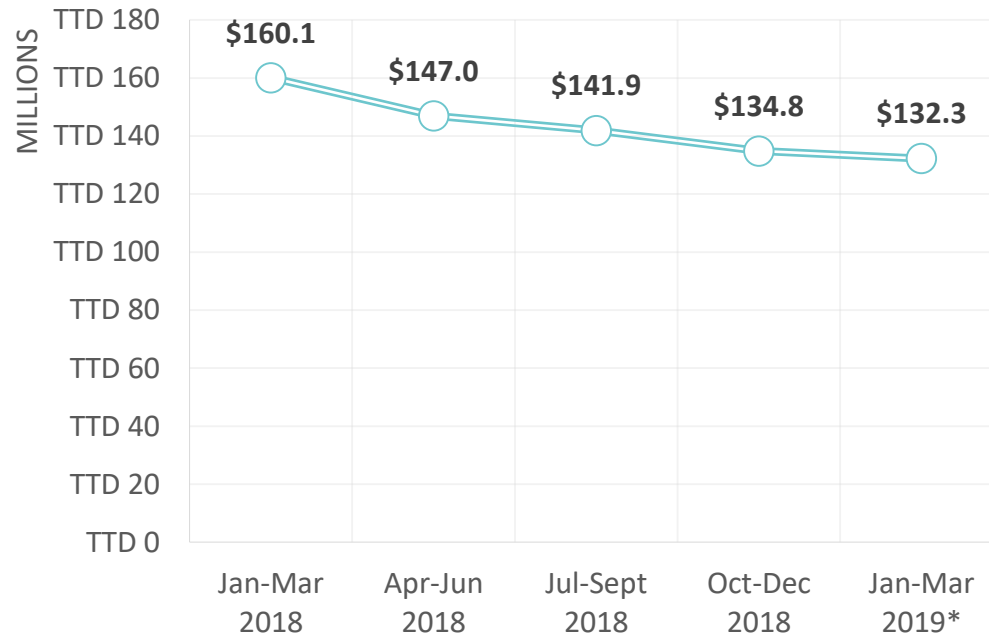
-17.4%



Q-o-Q
PERCENT CHANGE

-1.9%

Gross revenues from domestic fixed voice services from Q1 2018 to Q1 2019



—○— Gross Revenues from Domestic Fixed Voice Services

- **Data estimated for the following concessionaire who had not submitted data at the date of publication: Ampla Communications Limited**

Fixed Voice HHI



HHI

4,046



Y-o-Y
PERCENT CHANGE

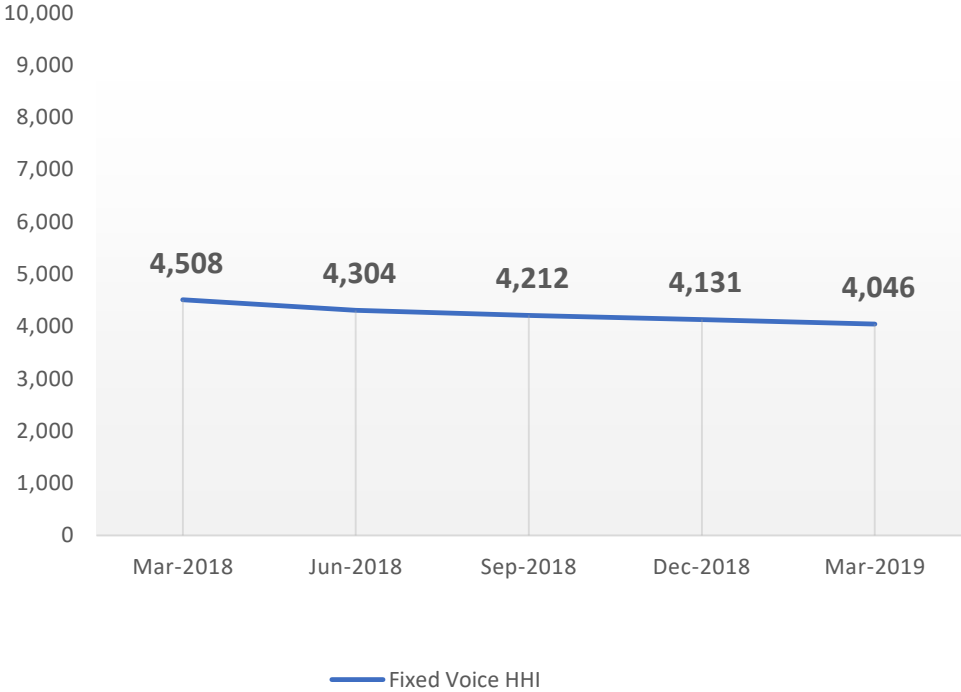
-10.2%



Q-o-Q
PERCENT CHANGE

-2.1%

HHI for Domestic Fixed Line
from Q1 2018 to Q1 2019



• Data estimated for the following concessionaire who had not submitted data at the date of publication:
Amplia Communications Limited

Fixed Voice Average Revenue Per User

ARPU



\$415

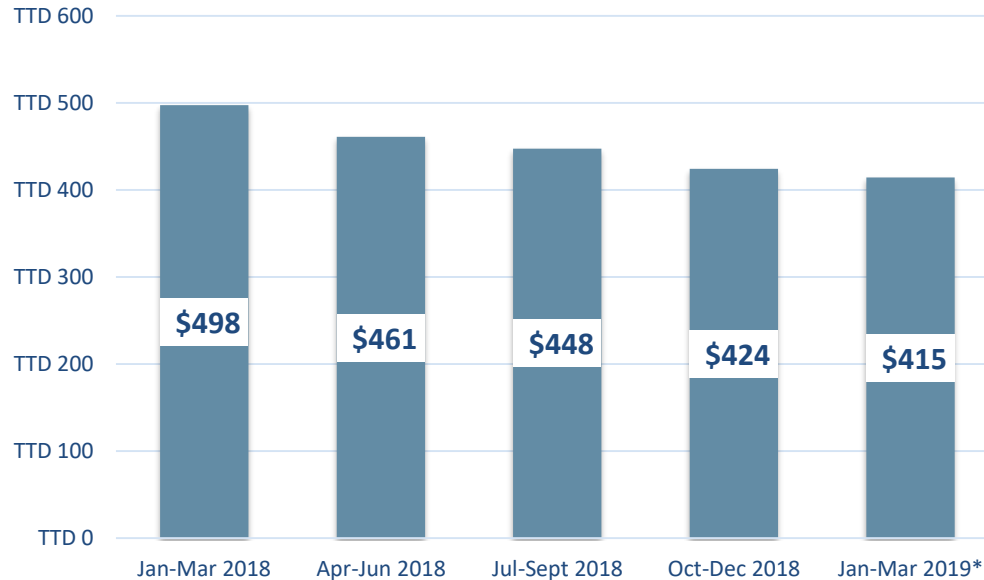
Y-o-Y
PERCENT CHANGE

-16.7%

Q-o-Q
PERCENT CHANGE

-2.1%

ARPU from Domestic Fixed Voice Services
from Q1 2018 to Q1 2019



■ ARPU from Domestic Fixed Voice Services

- **Data estimated for the following concessionaire who had not submitted data at the date of publication: Amplia Communications Limited**

Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,049,000



Y-o-Y
PERCENT CHANGE

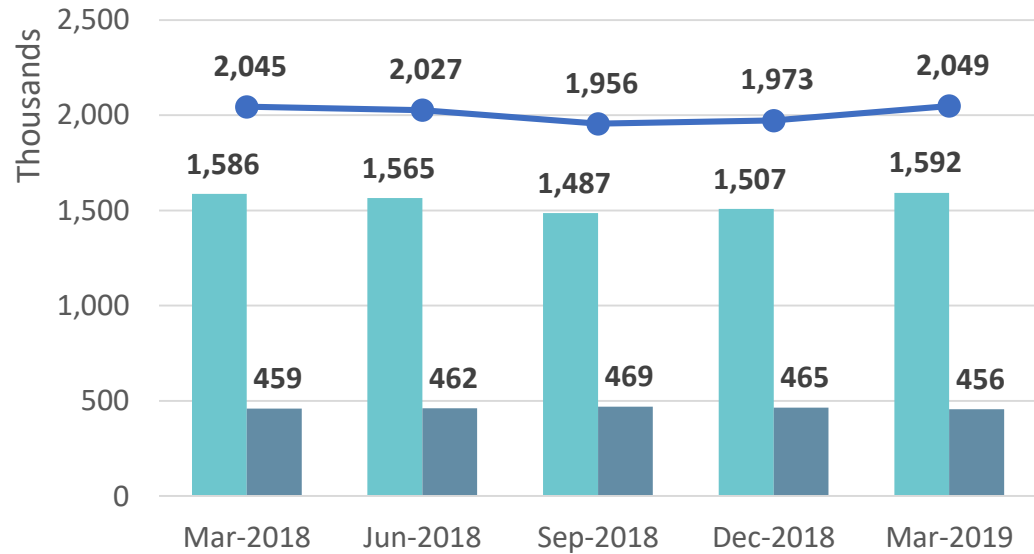
0.2%



Q-o-Q
PERCENT CHANGE

3.9%

Number of Mobile Voice Subscriptions
from Q1 2018 to Q1 2019



Prepaid Subscriptions Postpaid Subscriptions
Total Mobile Voice subscriptions

Mobile Voice Penetration



MOBILE VOICE
PENETRATION PER
100 INHABITANTS

150.7



Y-o-Y
PERCENT CHANGE

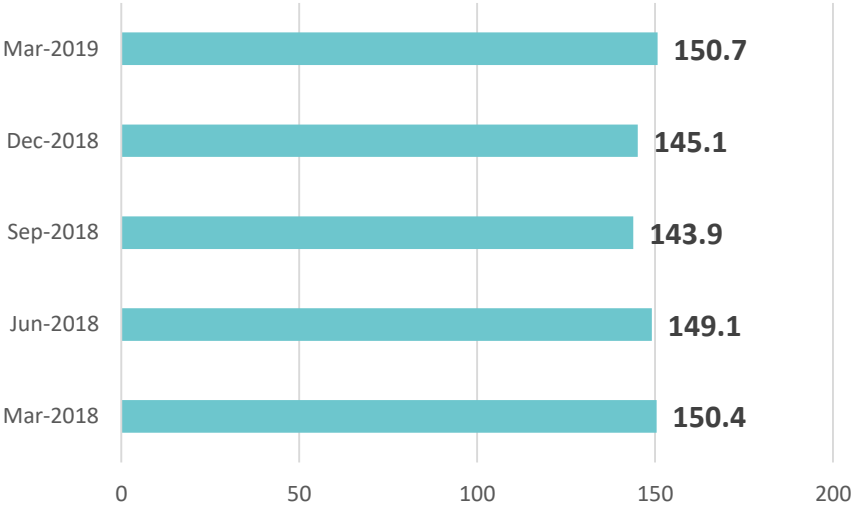
0.2%



Y-o-Y
PERCENT CHANGE

3.9%

Penetration of Mobile Voice Subscriptions
from Q1 2018 to Q1 2019



Mobile Voice Penetration (Population)

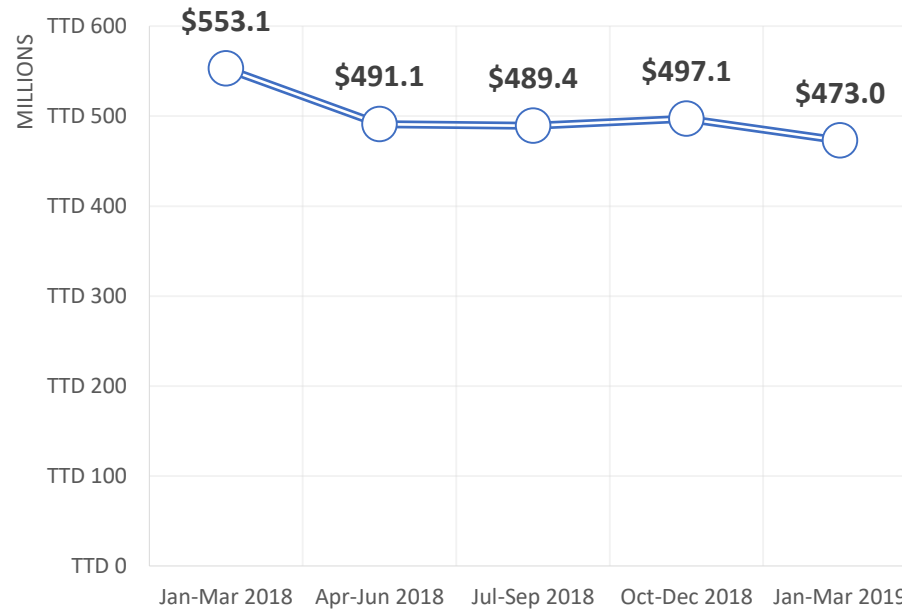
Mobile Services Revenues

\$

GROSS REVENUES

\$473.0m

Total gross revenues from domestic mobile services (TTD)
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

-14.5%



Q-o-Q
PERCENT CHANGE

-4.8%

Mobile Voice HHI



HHI

5,088



Y-o-Y
PERCENT CHANGE

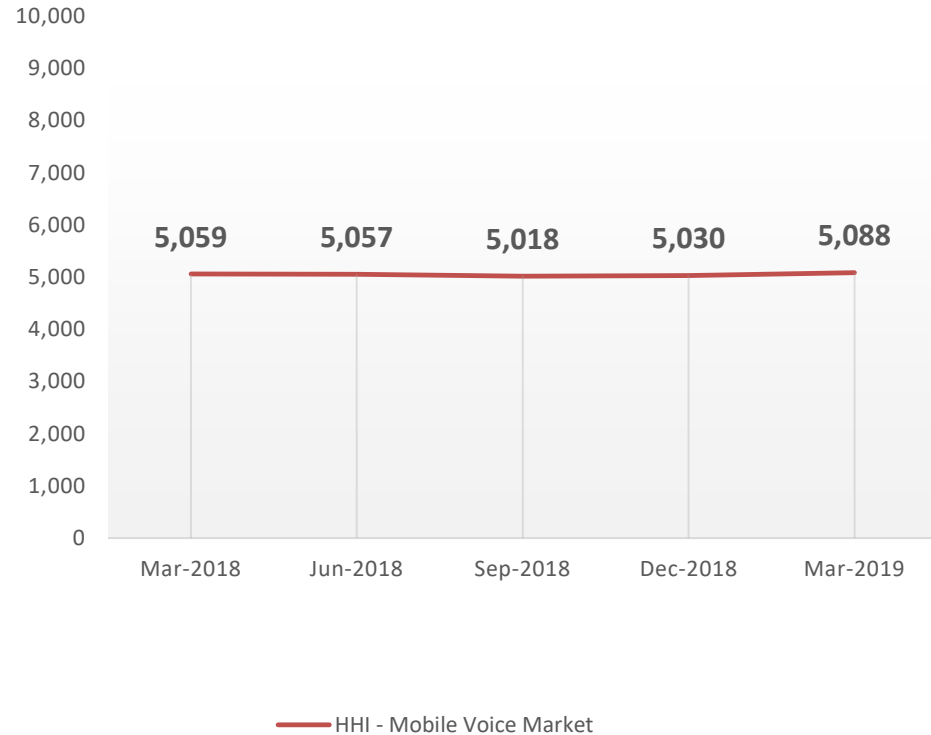
0.6%



Q-o-Q
PERCENT CHANGE

1.2%

HHI for Domestic Mobile Services
from Q1 2018 to Q1 2019



Average Revenue Per User

Mobile Services



ARPU

\$232



Y-o-Y
PERCENT CHANGE

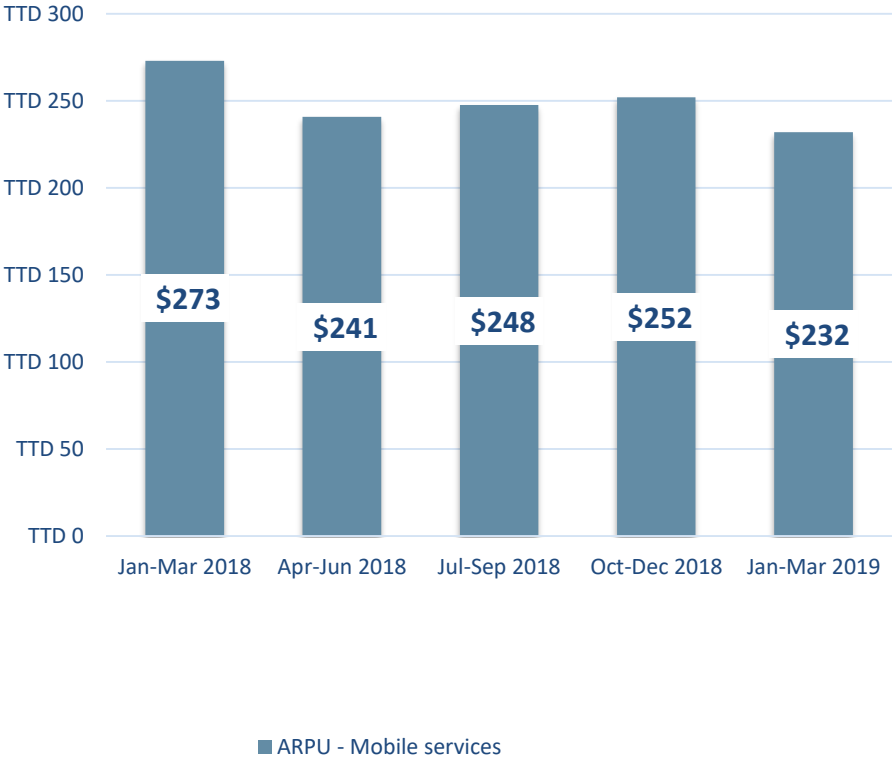
-15.0%



Q-o-Q
PERCENT CHANGE

-7.9%

ARPU for Domestic Mobile Services
from Q1 2018 to Q1 2019



Fixed Broadband Subscriptions

TOTAL NUMBER OF
SUBSCRIPTIONS

343,600

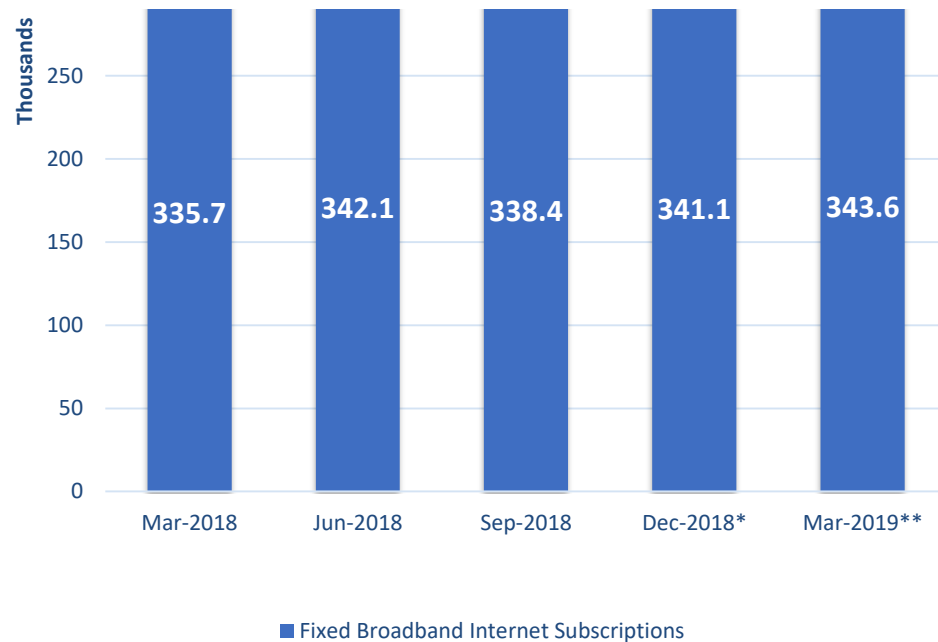
Y-o-Y
PERCENT CHANGE

2.4%

Q-o-Q
PERCENT CHANGE

0.7%

Number of Fixed Broadband Internet Subscriptions
from Q1 2018 to Q1 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 Amplia Communications Limited*

Fixed Internet Penetration



FIXED INTERNET PENETRATION PER 100 INHABITANTS

25.3



Y-o-Y PERCENT CHANGE

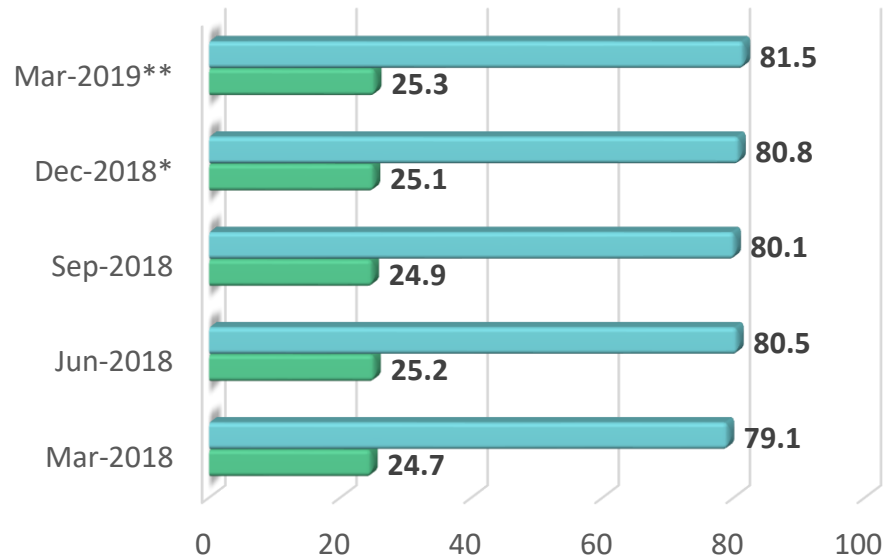
2.4%



Y-o-Y PERCENT CHANGE

0.8%

Penetration for fixed internet subscriptions from Q1 2018 to Q1 2019



Fixed Internet Penetration (Household)



FIXED INTERNET PENETRATION PER 100 HOUSEHOLDS

81.5



Y-O-Y PERCENT CHANGE

3.0%



Y-O-Y PERCENT CHANGE

0.9%

*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 and Ampla Communications Limited

Mobile Internet Penetration

MOBILE INTERNET
PENETRATION PER 100
INHABITANTS

47.7

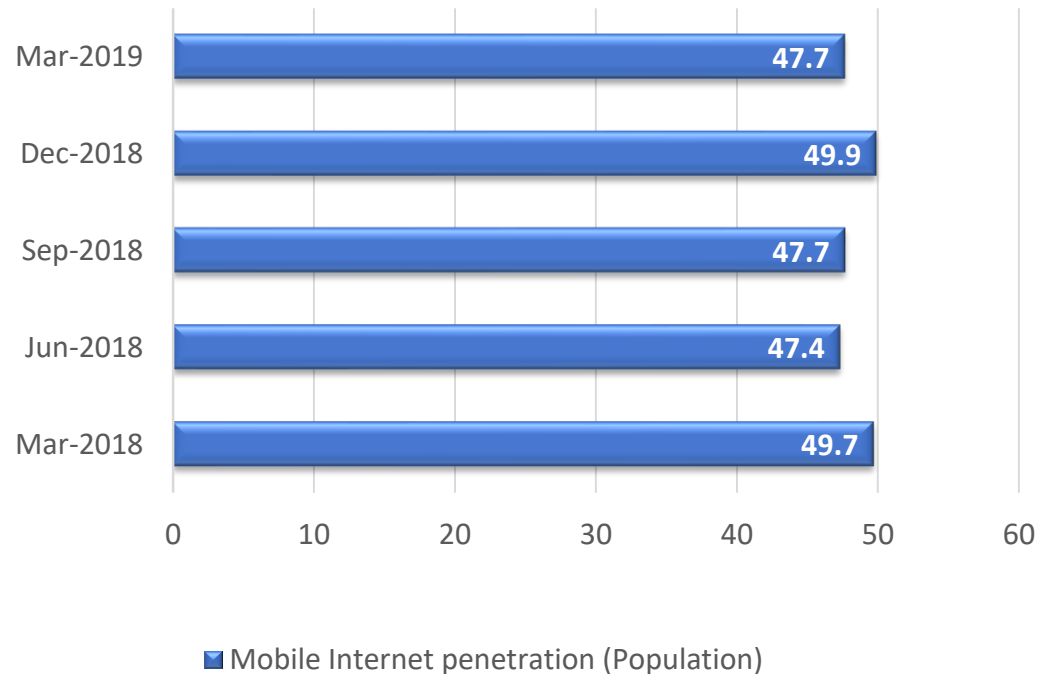
Y-o-Y
PERCENT CHANGE

-4.0%

Y-o-Y
PERCENT CHANGE

-4.4%

Penetration for Mobile Internet Subscriptions
from Q1 2018 to Q1 2019



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

Fixed Internet Revenues



GROSS REVENUES

\$260.0m



Y-o-Y
PERCENT CHANGE

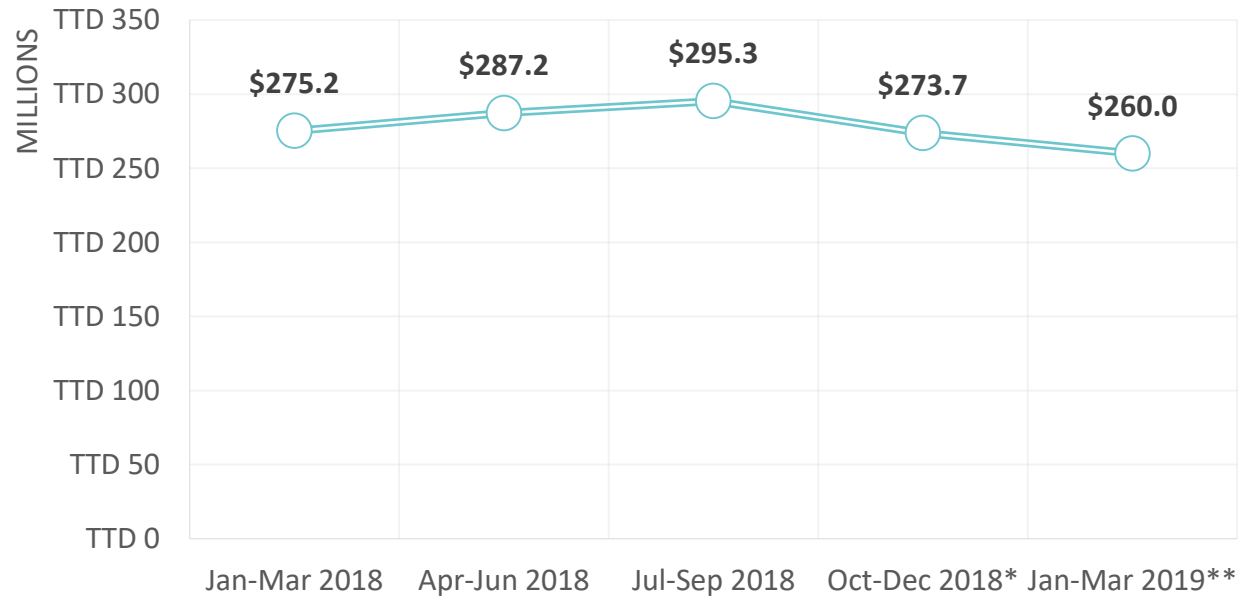
-5.5%



Q-o-Q
PERCENT CHANGE

-5.0%

Gross Revenues from Fixed Internet Services
from Q1 2018 to Q1 2019



—○— Gross Revenue from Fixed Internet Services

*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 Ampla Communications Limited

Fixed Internet HHI



HHI

3,010



Y-o-Y
PERCENT CHANGE

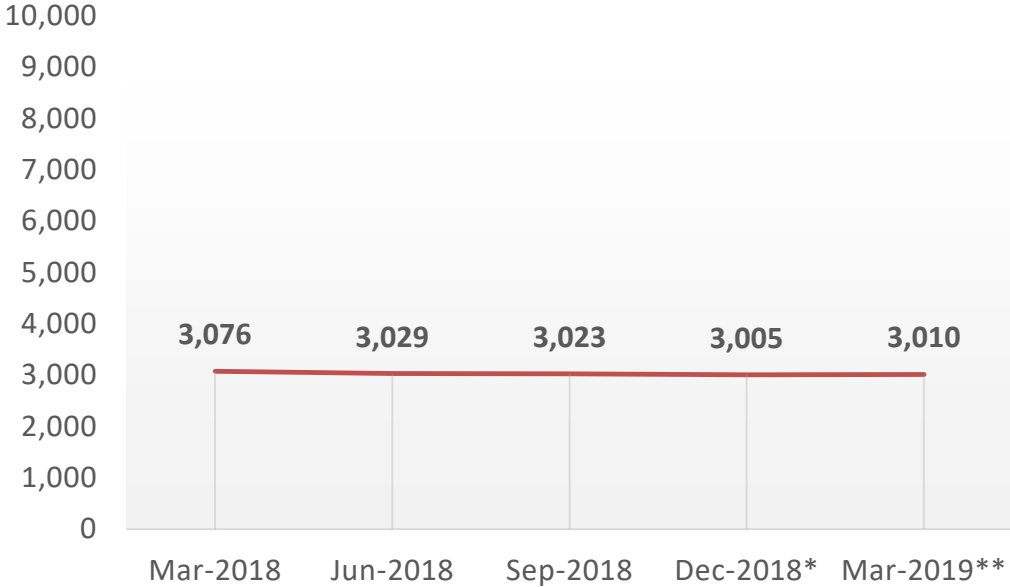
-2.1%



Q-o-Q
PERCENT CHANGE

0.3%

HHI for Fixed Internet Services
from Q1 2017 to Q1 2018



— Fixed Internet HHI

**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 Amplia Communications Limited*

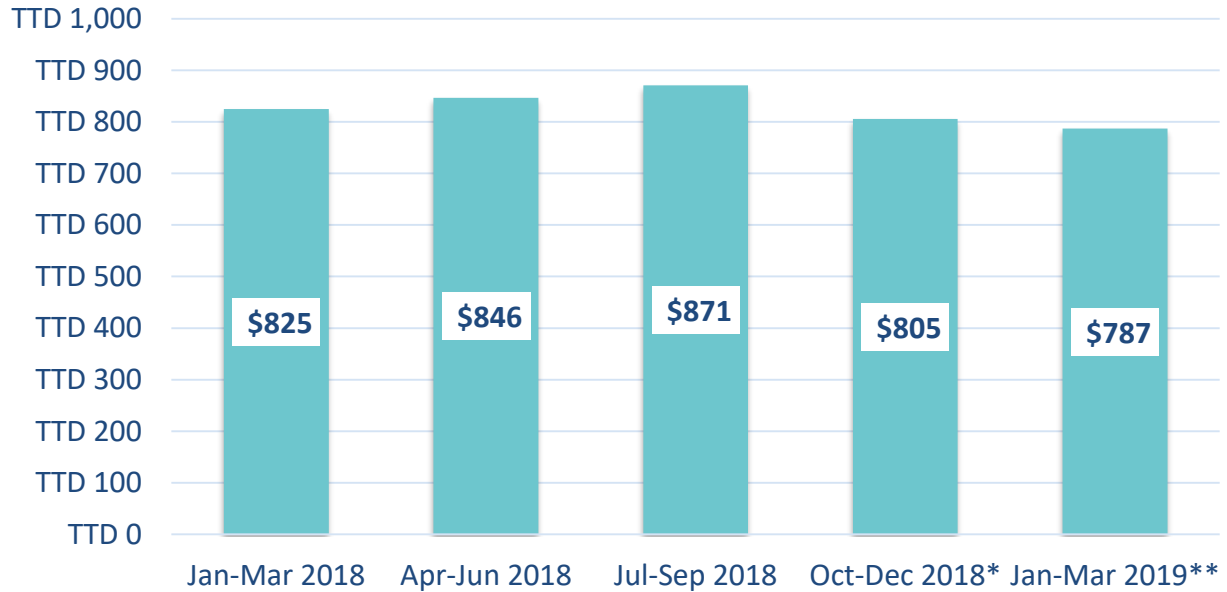
Fixed Internet Average Revenue Per User

ARPU



\$787

ARPU for Fixed Internet Services
from Q1 2018 to Q1 2019



Y-o-Y
PERCENT CHANGE

-4.6%

Q-o-Q
PERCENT CHANGE

-2.2%

■ Fixed Internet ARPU

*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 Ampla Communications Limited

Pay TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

215,500



Y-o-Y PERCENT CHANGE

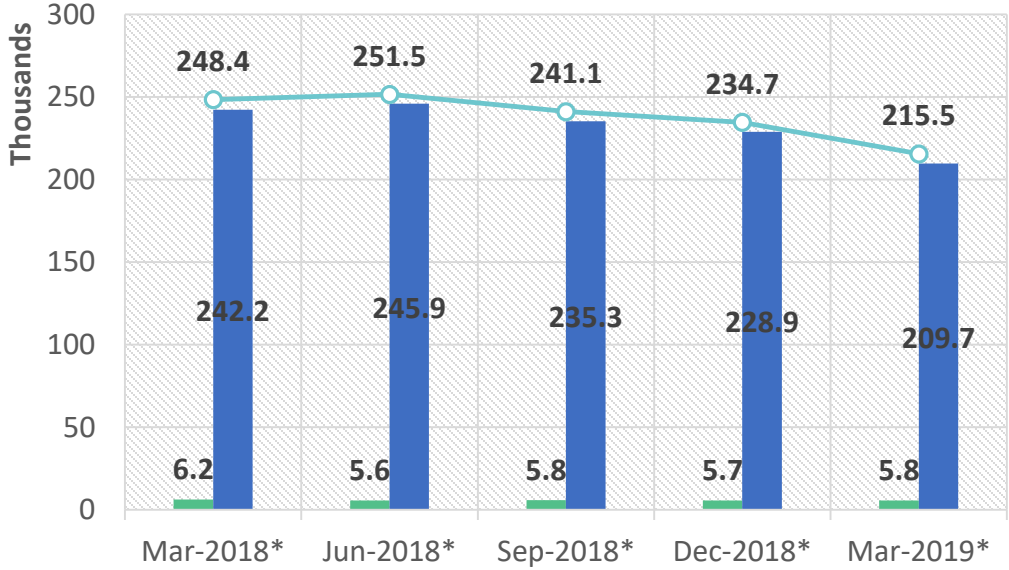
-13.2%



Q-o-Q PERCENT CHANGE

-8.2%

Number of Pay TV Subscriptions from Q1 2018 to Q1 2019



Analogue Subscriptions Digital Subscriptions Total Pay TV Subscriptions

• 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

15.5



Y-o-Y
PERCENT CHANGE

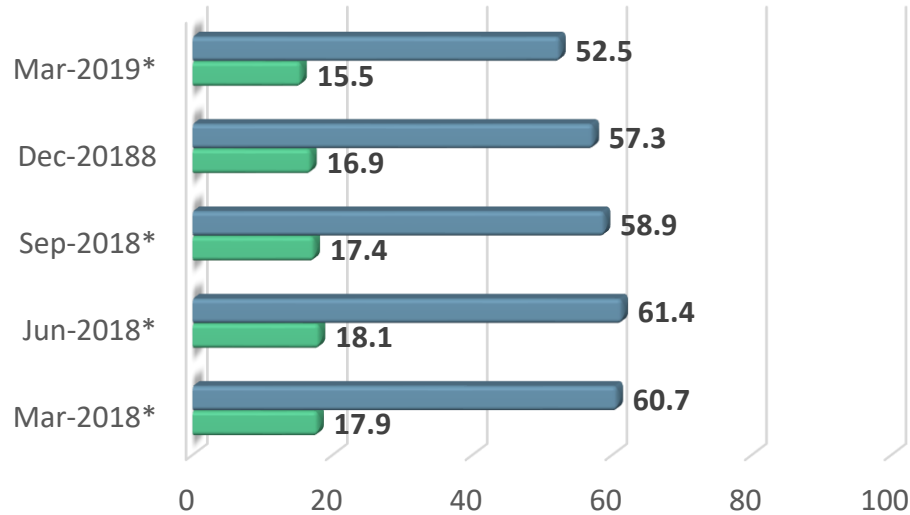
-13.4%



Y-o-Y
PERCENT CHANGE

-8.3%

Penetration Rates of Pay TV Services
from Q1 2018 to Q1 2019



Based on the total number of residential Pay TV subscriptions

■ Pay TV Penetration (Household) ■ Pay TV Penetration (Population)

- 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

52.5



Y-O-Y
PERCENT CHANGE

-13.5%



Y-O-Y
PERCENT CHANGE

-8.4%

Pay TV Revenues



GROSS REVENUES

\$137.0m



Y-o-Y
PERCENT CHANGE

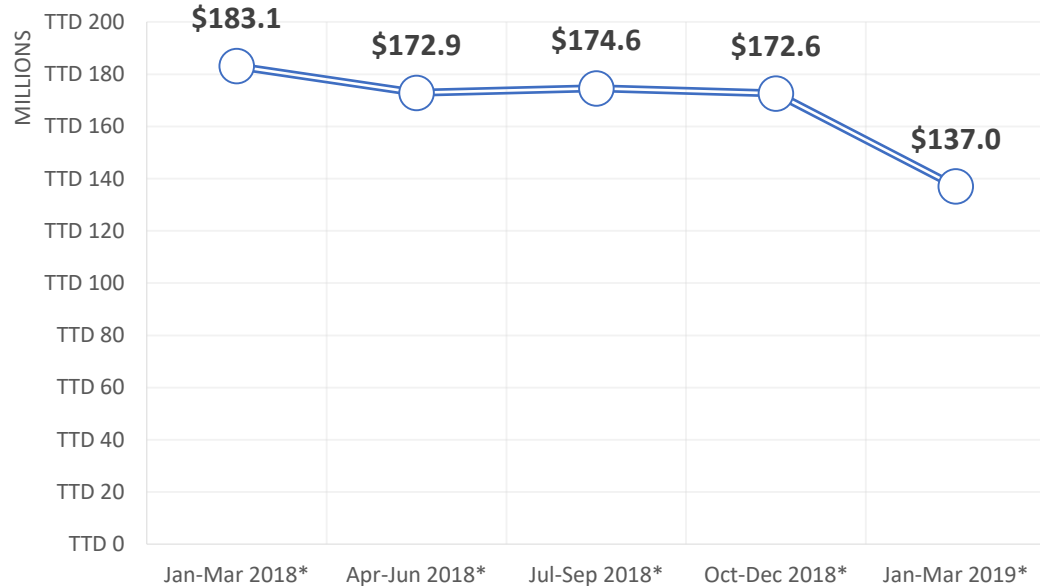
-25.2%



Q-o-Q
PERCENT CHANGE

-20.6%

Gross revenues from Pay TV services
From Q1 2018 to Q1 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

2,712



Y-o-Y
PERCENT CHANGE

-7.6%

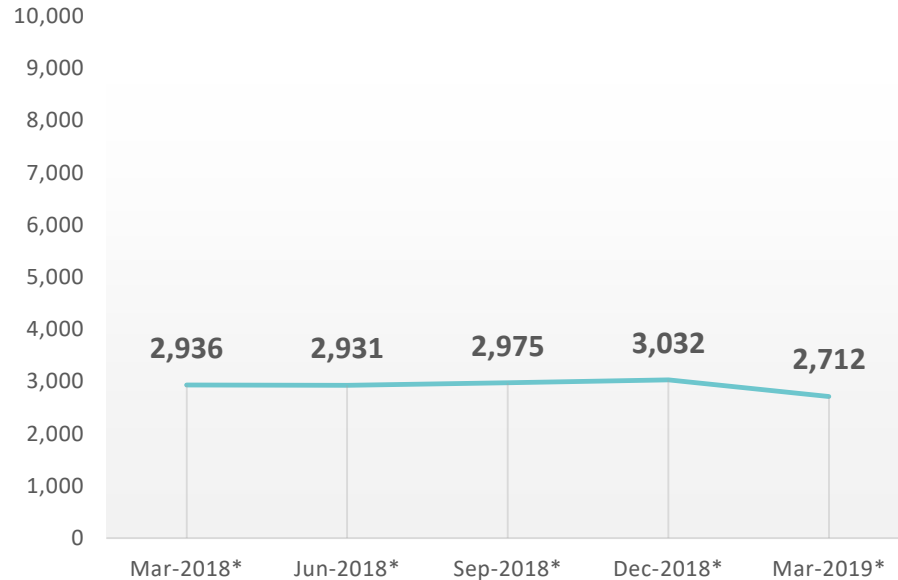


Q-o-Q
PERCENT CHANGE

10.6%

Pay TV HHI

HHI for Pay TV Services
from Q1 2018 to Q1 2019



— Pay TV HHI

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

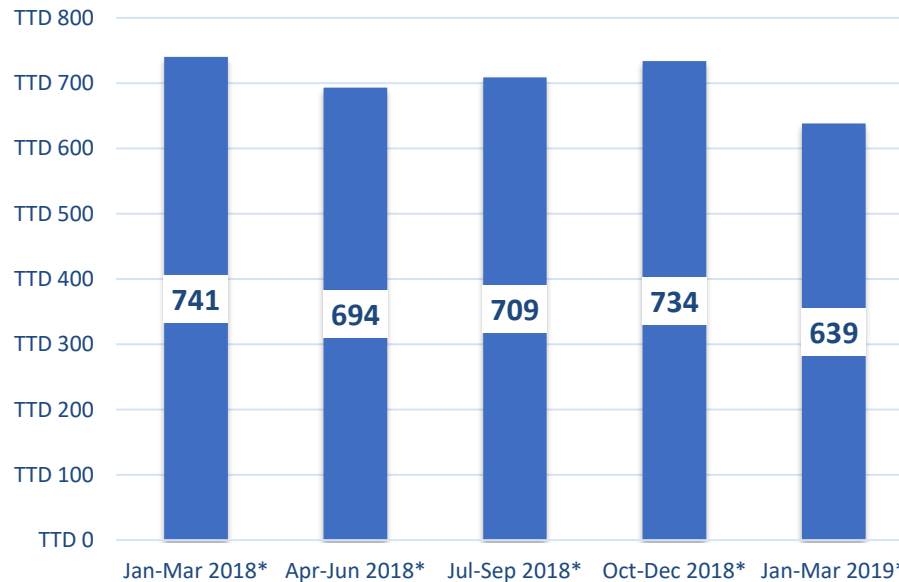
Pay TV

Average Revenue Per User

ARPU

\$
\$639

ARPU for Pay TV Services
from Q1 2018 to Q1 2019



Y-o-Y
PERCENT CHANGE

-13.8%

Q-o-Q
PERCENT CHANGE

-12.9%

■ Pay TV ARPU

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

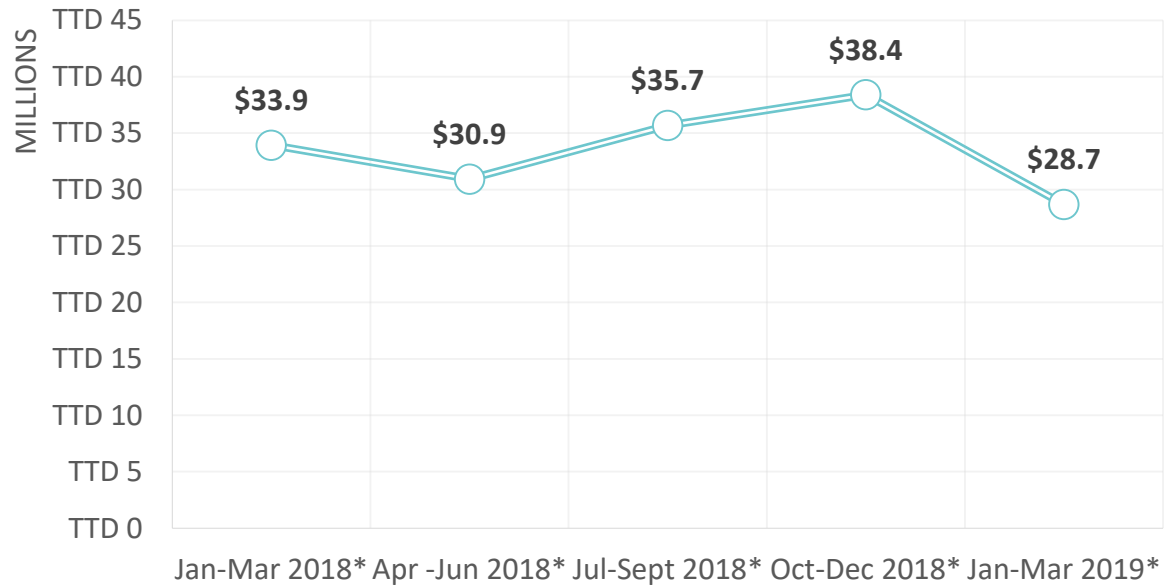
Free-to-Air Radio Revenues

\$ GROSS REVENUES
\$28.7m

Y-o-Y
PERCENT CHANGE
-15.3%

Q-o-Q
PERCENT CHANGE
-25.3%

Gross revenues from free-to-air radio services
From Q1 2018 to Q1 2019



—○— Total Gross FTA Radio Revenues

- *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

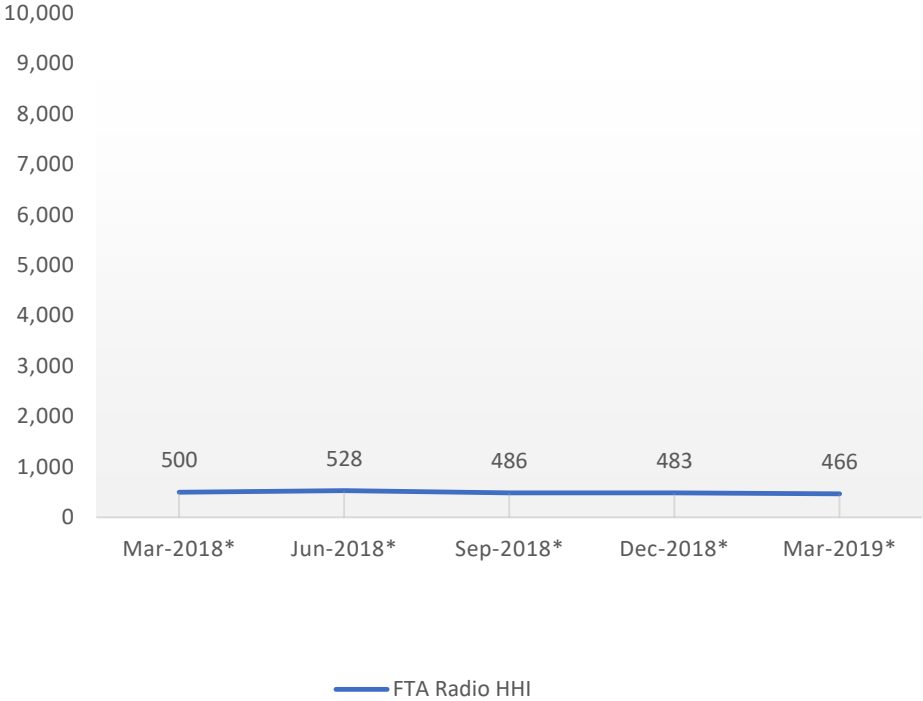
-6.8%



Q-o-Q
PERCENT CHANGE

-3.5%

HHI for Free to Air Radio Services
from Q1 2018 to Q1 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

\$13.0m

Y-o-Y

PERCENT CHANGE

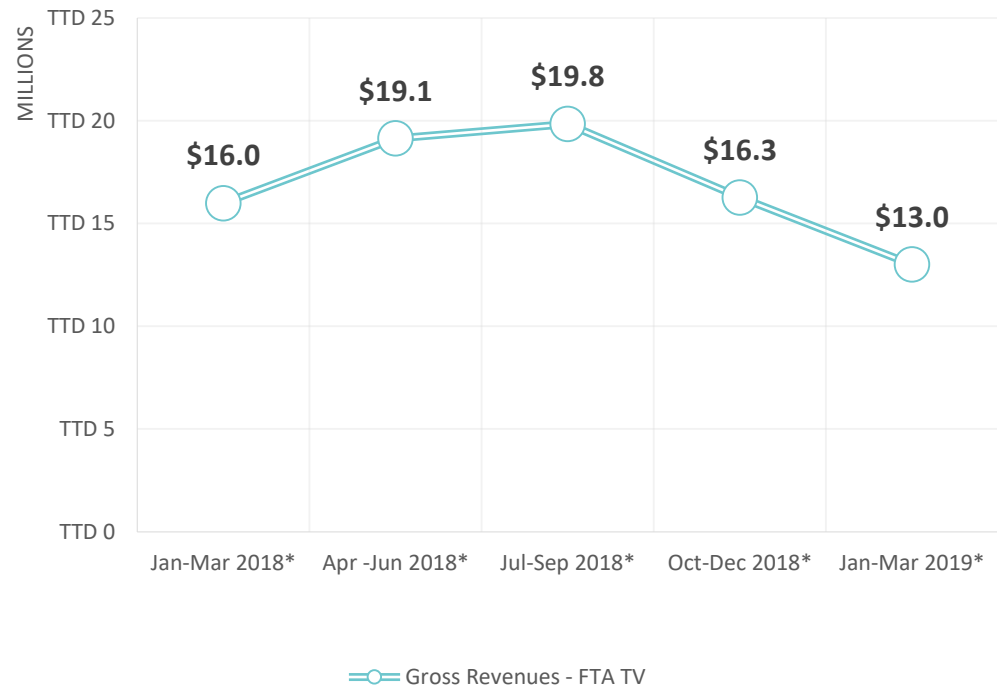
-18.8%

Q-o-Q

PERCENT CHANGE

-20.2%

Gross revenues from free-to-air TV services
from Q1 2018 to Q1 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

3,405



Y-o-Y
PERCENT CHANGE

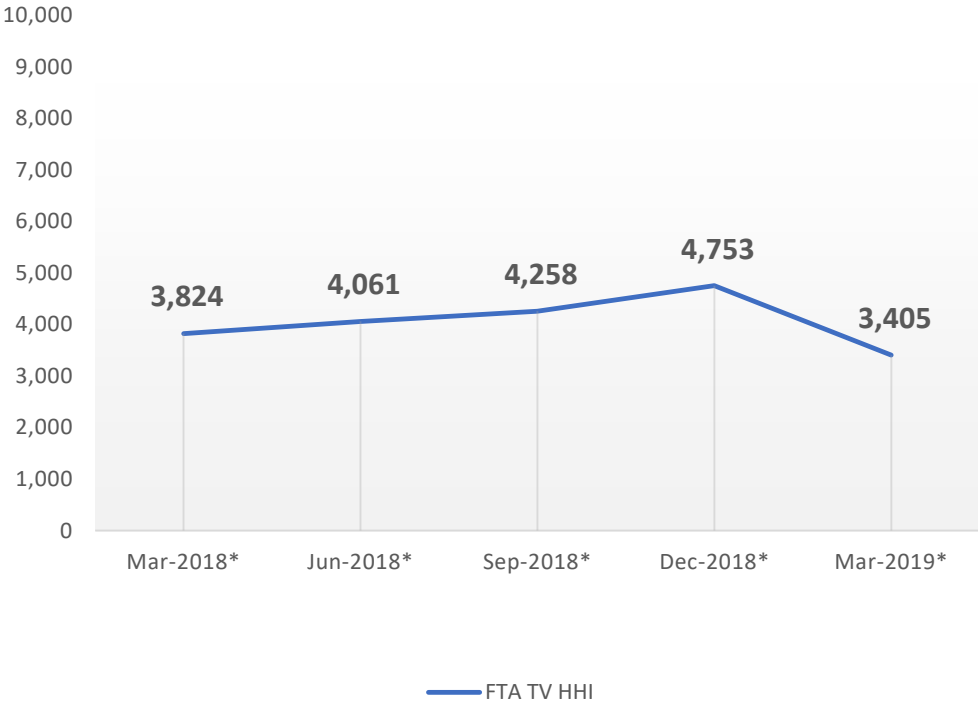
-11.0%



Q-o-Q
PERCENT CHANGE

-28.4%

HHI for Free to Air TV Services
from Q1 2018 to Q1 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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