

QUARTERLY MARKET UPDATE

January to March 2021



Quarterly Market Update – Q1 2021

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Free-to-Air TV Market

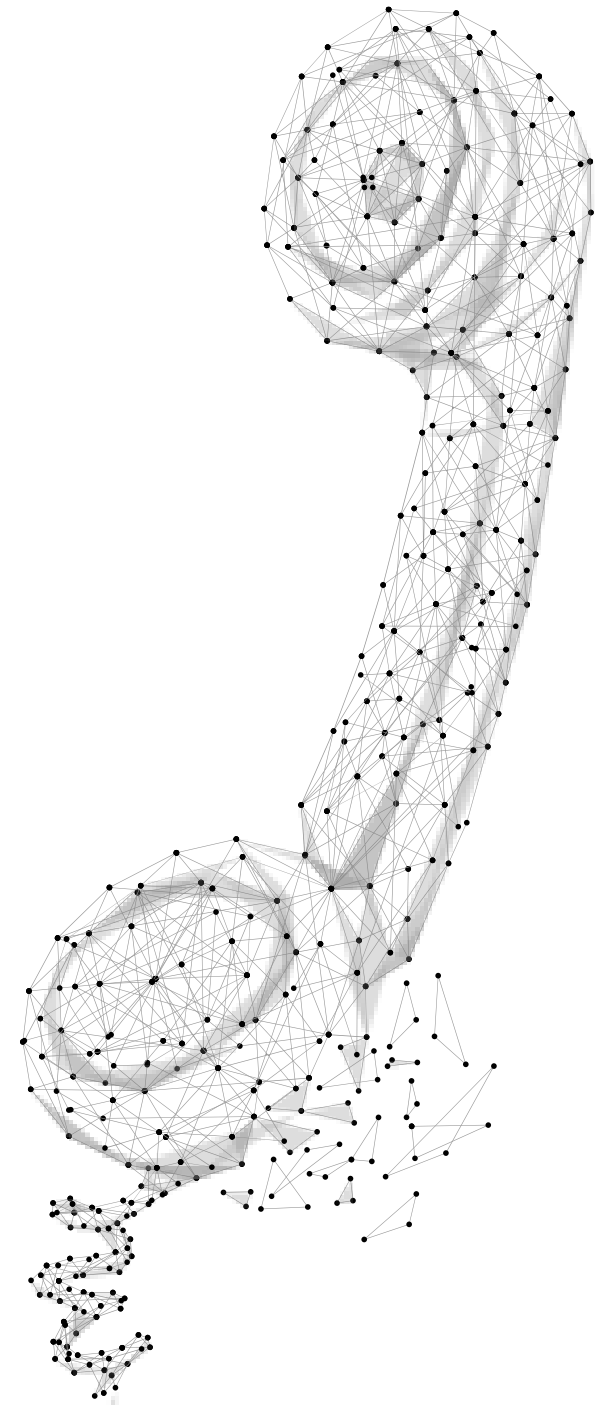
Notes

- 1. Fixed Internet Market includes fixed wired and fixed wireless Internet.**

- 2. Penetration rates have been calculated using the following population figures:**
 - a) 1,366,725 (2020 Mid-year population estimate, Central Statistical Office)**

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

Fixed Voice



Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

328,400



Y-o-Y PERCENT CHANGE

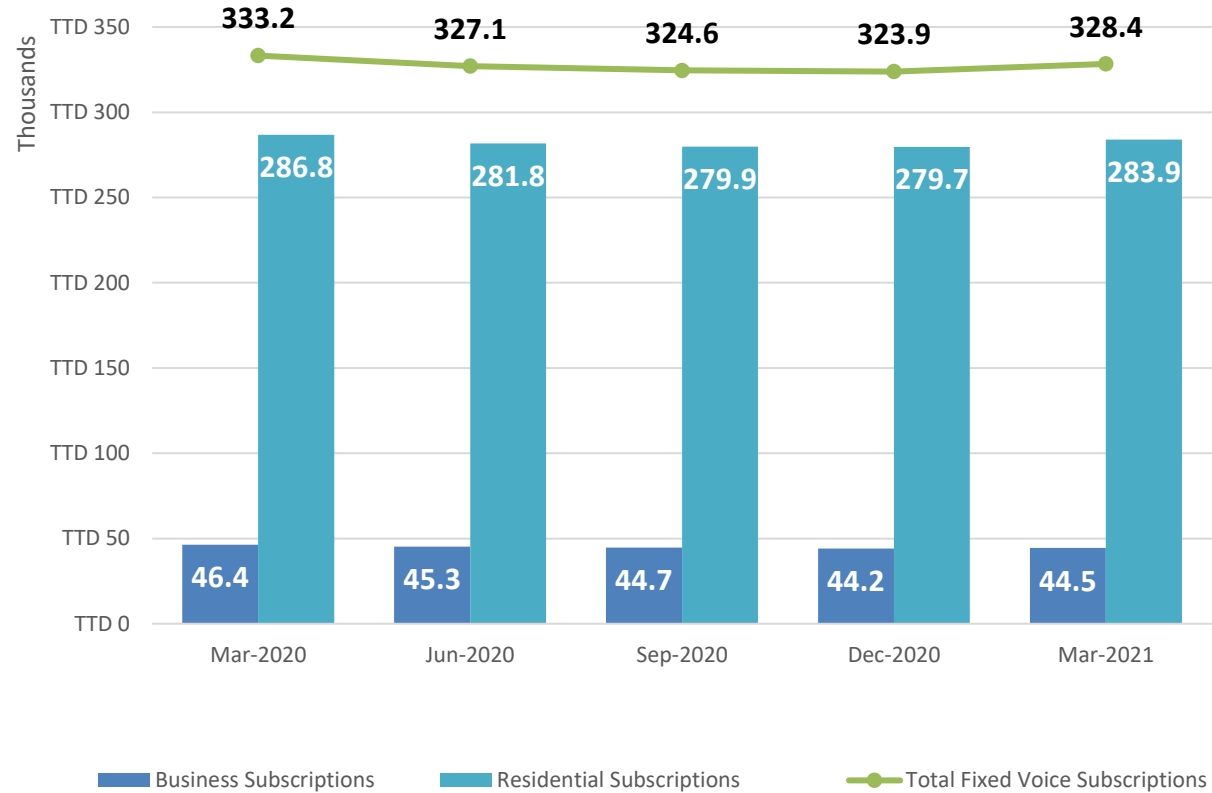
-1.5%



Q-o-Q PERCENT CHANGE

1.4%

Number of Fixed Line Subscriptions
Q1 2020 to Q1 2021



Fixed Voice Penetration



**FIXED VOICE
PENETRATION PER
100 INHABITANTS**

24



**Y-o-Y
PERCENT
CHANGE**

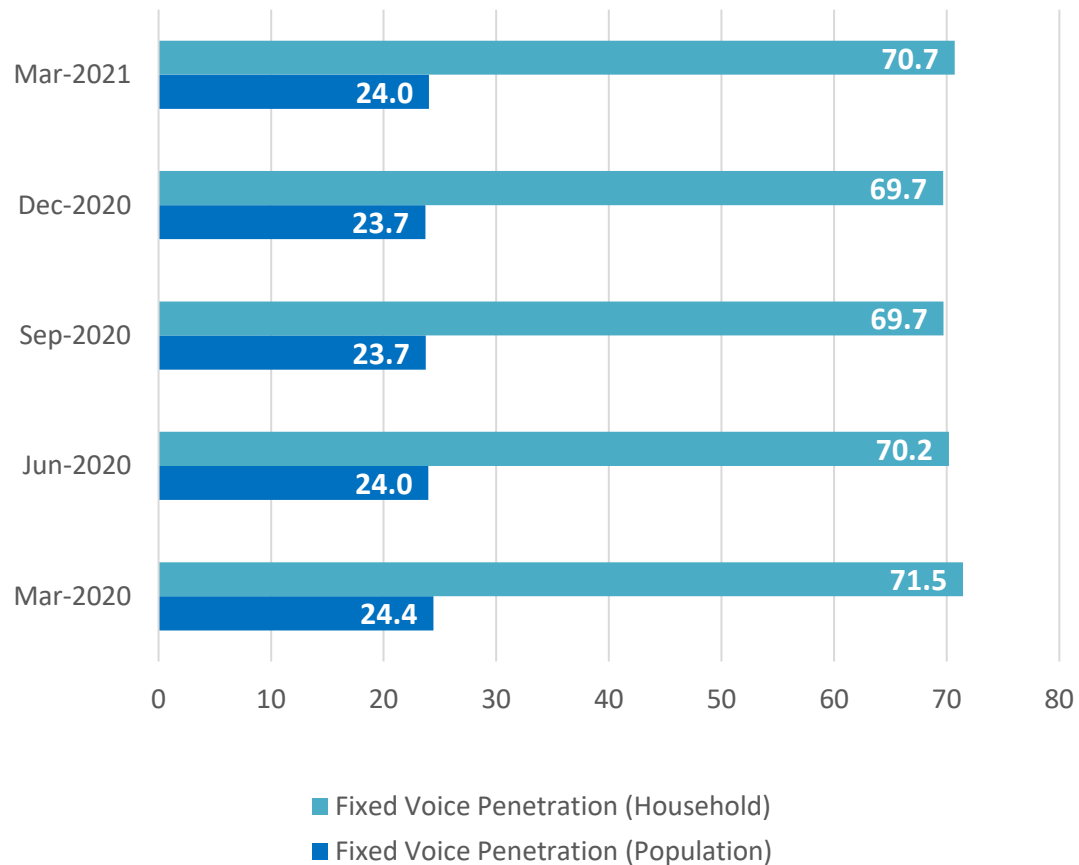
-1.7%



**Q-o-Q
PERCENT
CHANGE**

1.4%

Penetration Rate of Fixed Line Subscriptions
from Q1 2020 to Q1 2021



**FIXED LINE
PENETRATION PER
100 HOUSEHOLDS**

70.7



**Y-o-Y
PERCENT
CHANGE**

-1.0%



**Q-o-Q
PERCENT
CHANGE**

1.5%

Fixed Voice Revenues



GROSS REVENUES

\$ 109.7m



Y-o-Y PERCENT CHANGE

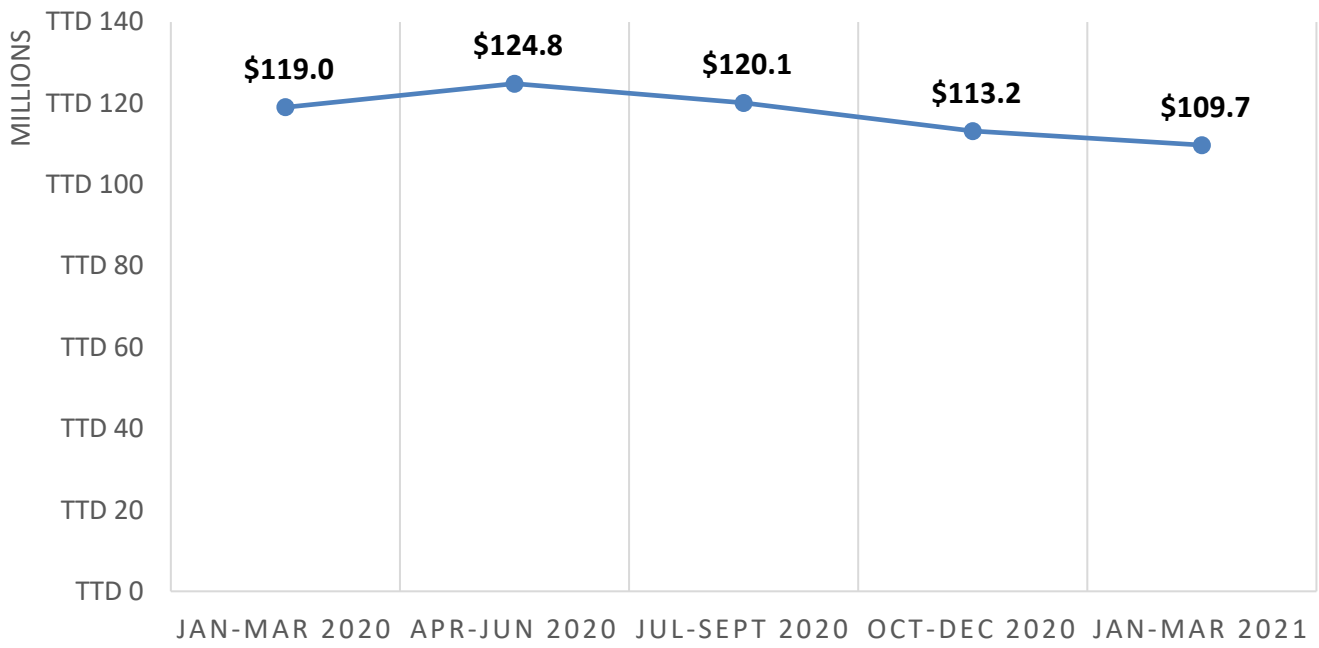
-7.8%



Q-o-Q PERCENT CHANGE

-3.1%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q1 2020 TO Q1 2021



— Gross Revenues from Domestic Fixed Voice Services

Fixed Voice HHI



HHI

3,393



Y-o-Y
PERCENT
CHANGE

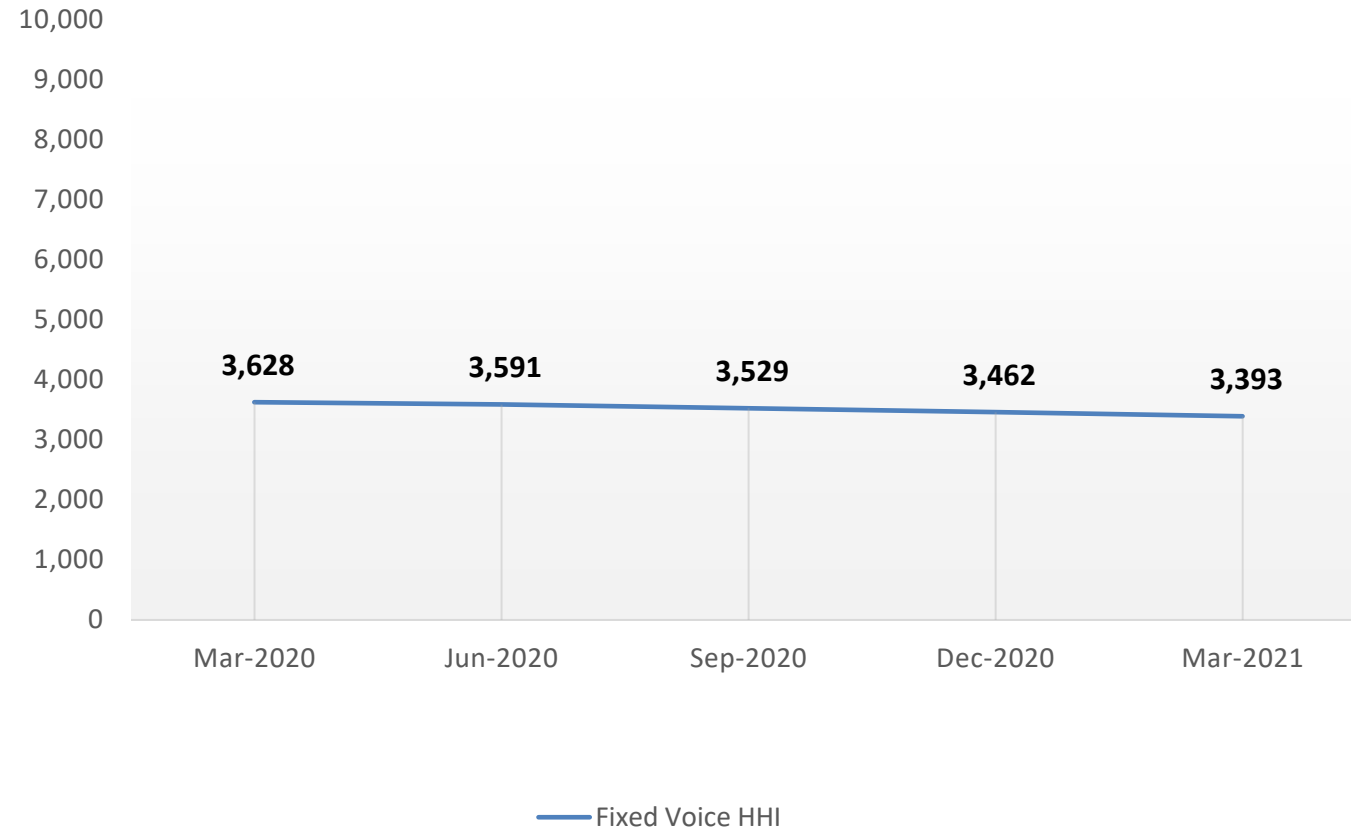
-6.5%



Q-o-Q
PERCENT
CHANGE

-2.0%

HHI for Domestic Fixed Line
from Q1 2020 to Q1 2021



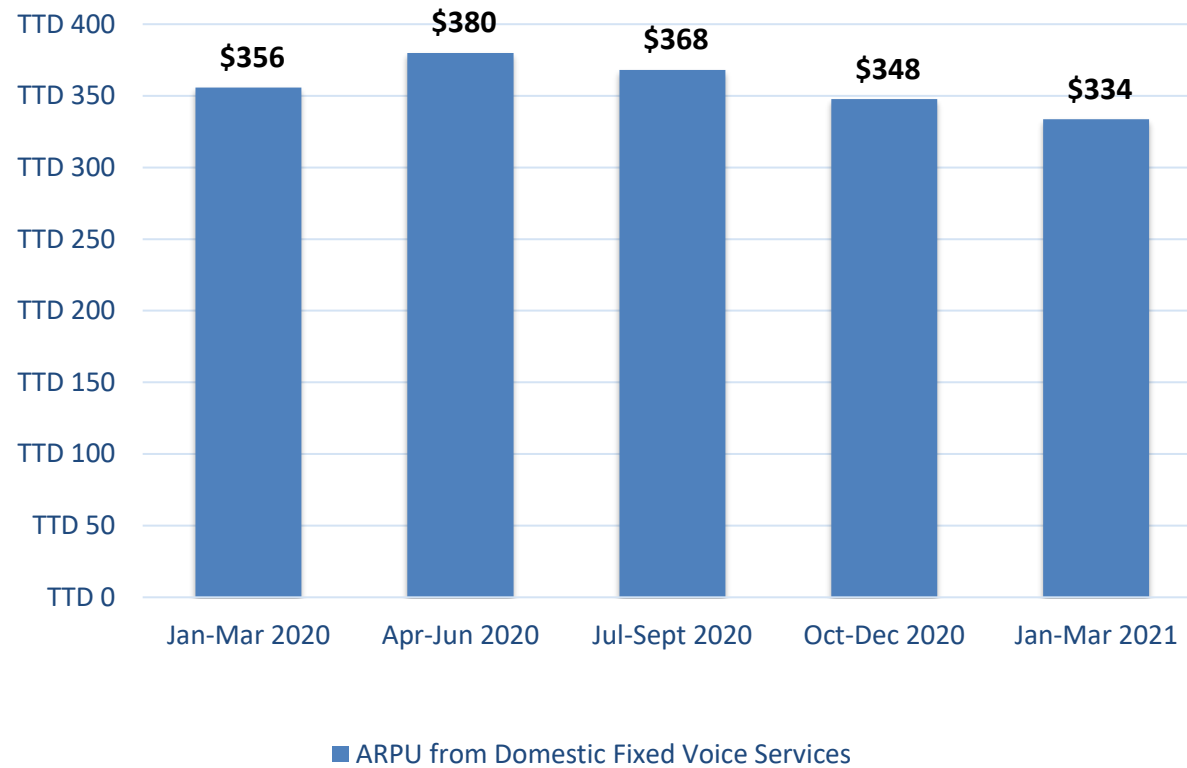
Fixed Voice Average Revenue Per User

ARPU
\$ **\$334**

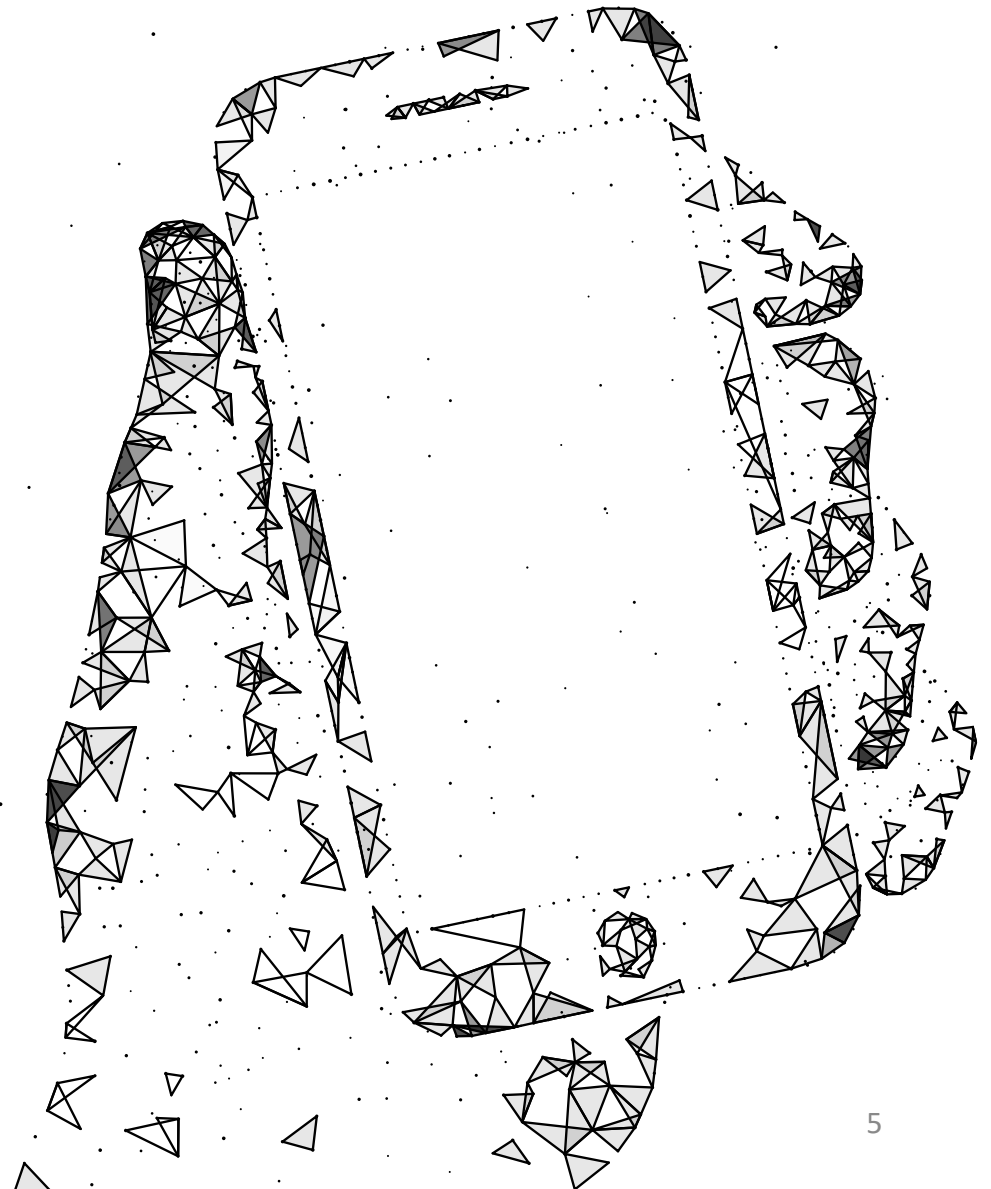
Y-o-Y
PERCENT
CHANGE
-6.2%

Q-o-Q
PERCENT
CHANGE
-4.0%

ARPU from Domestic Fixed Voice Services
from Q1 2020 to Q1 2021



Mobile Voice



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,970,100



Y-o-Y PERCENT CHANGE

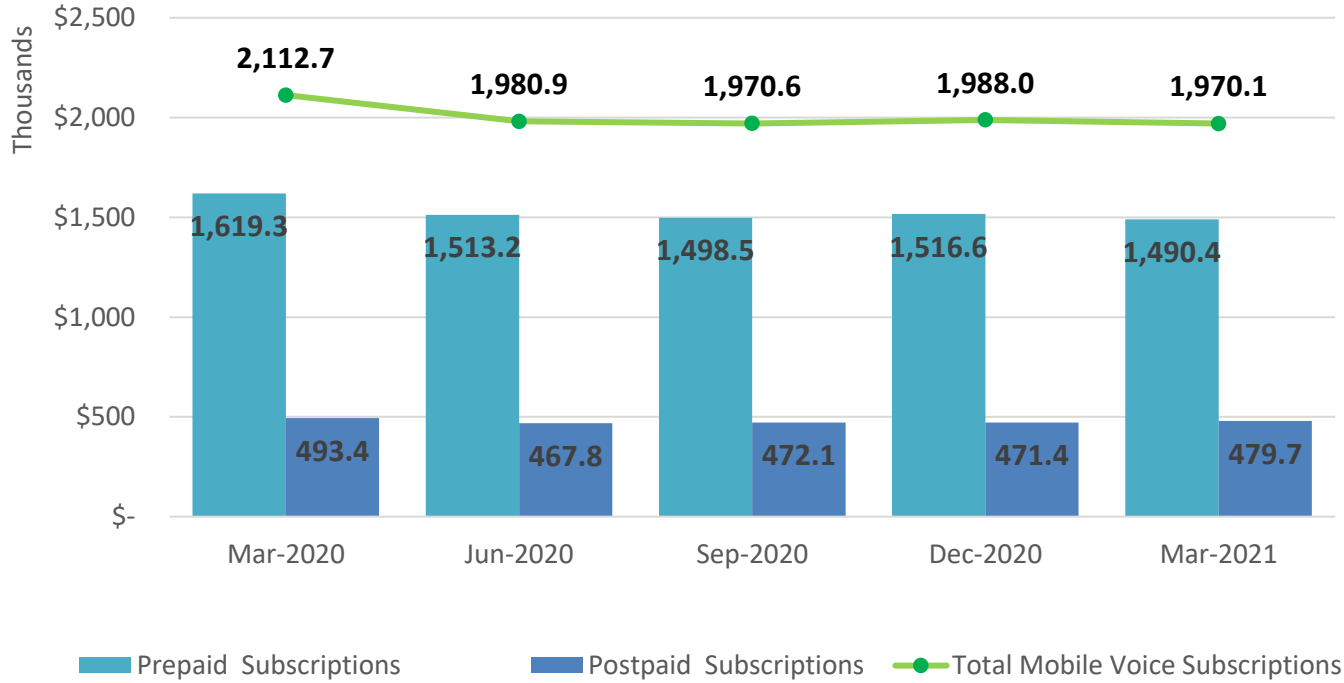
-6.7%



Q-o-Q PERCENT CHANGE

-0.9%

Number of Mobile Voice Subscriptions from Q1 2020 to Q1 2021



Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

144.1



**Y-o-Y
PERCENT
CHANGE**

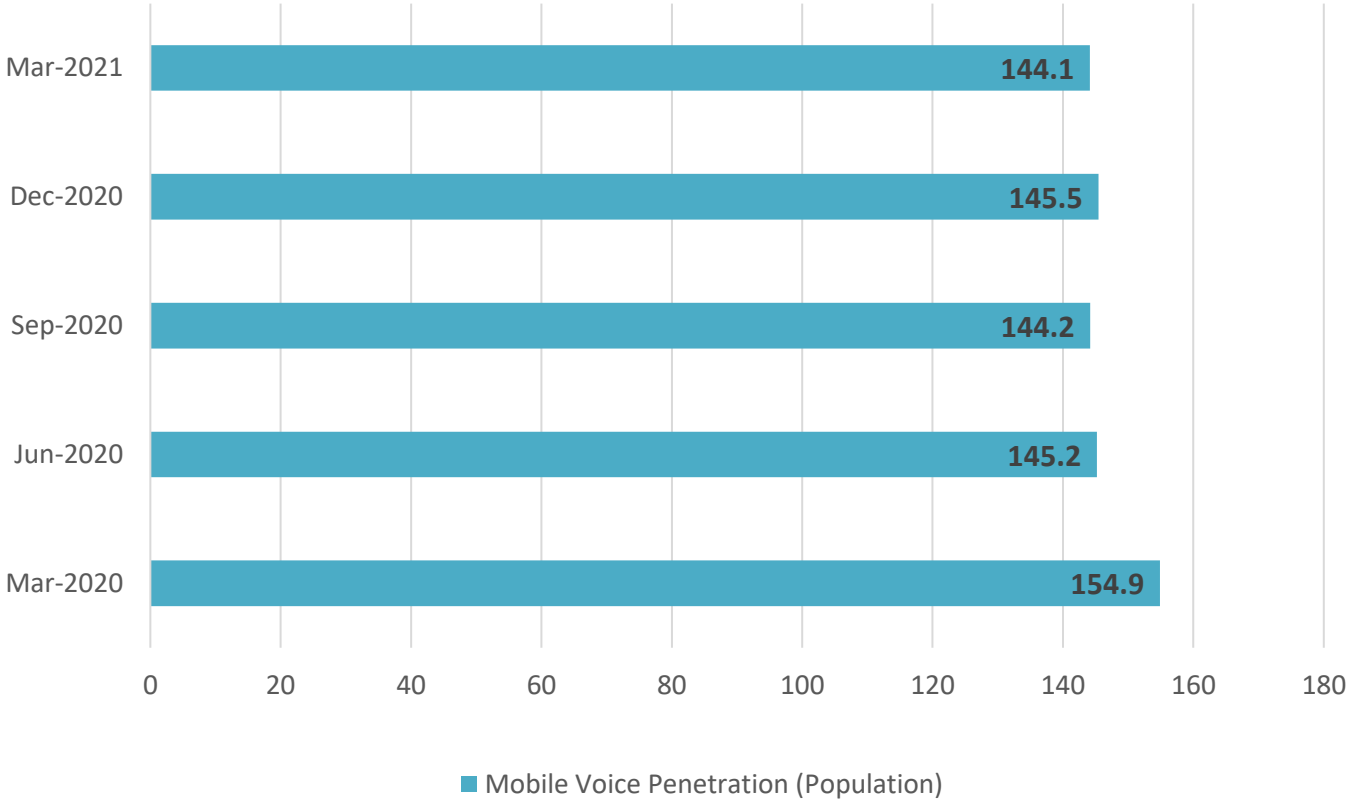
-6.9%



**Q-o-Q
PERCENT
CHANGE**

-0.9%

Penetration of Mobile Voice Subscriptions
from Q1 2020 to Q1 2021



Mobile Services Revenues



GROSS REVENUES

\$481.3m



Y-o-Y PERCENT CHANGE

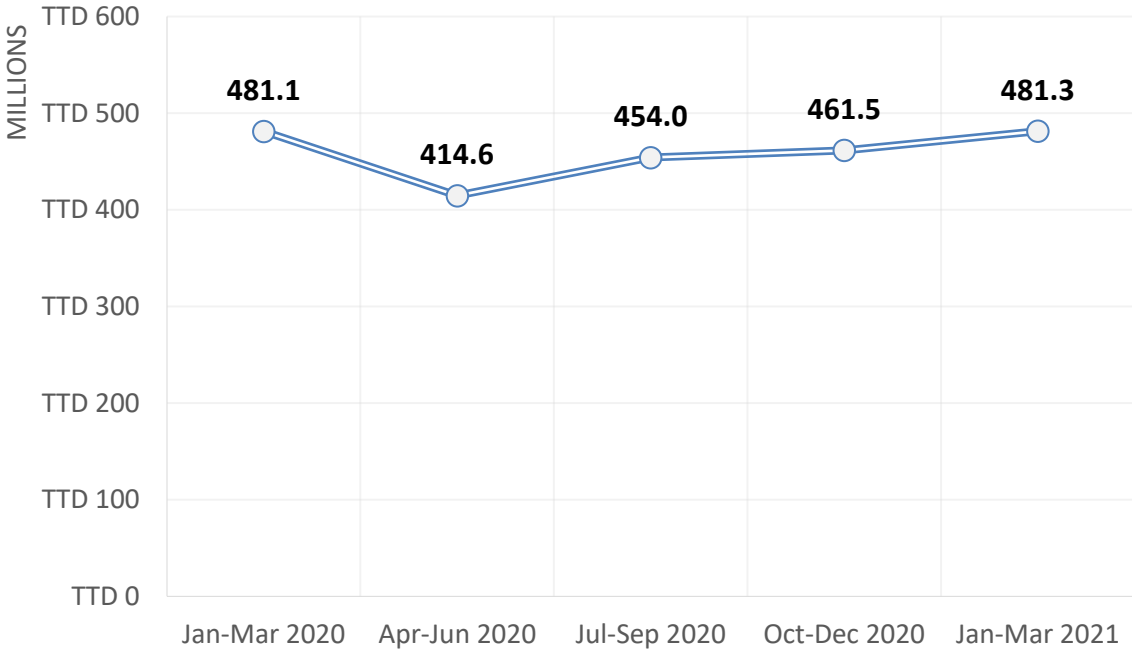
0.0%



Q-o-Q PERCENT CHANGE

4.3%

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$) FROM Q1 2020 TO Q1 2021



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

Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,201



Y-o-Y
PERCENT
CHANGE

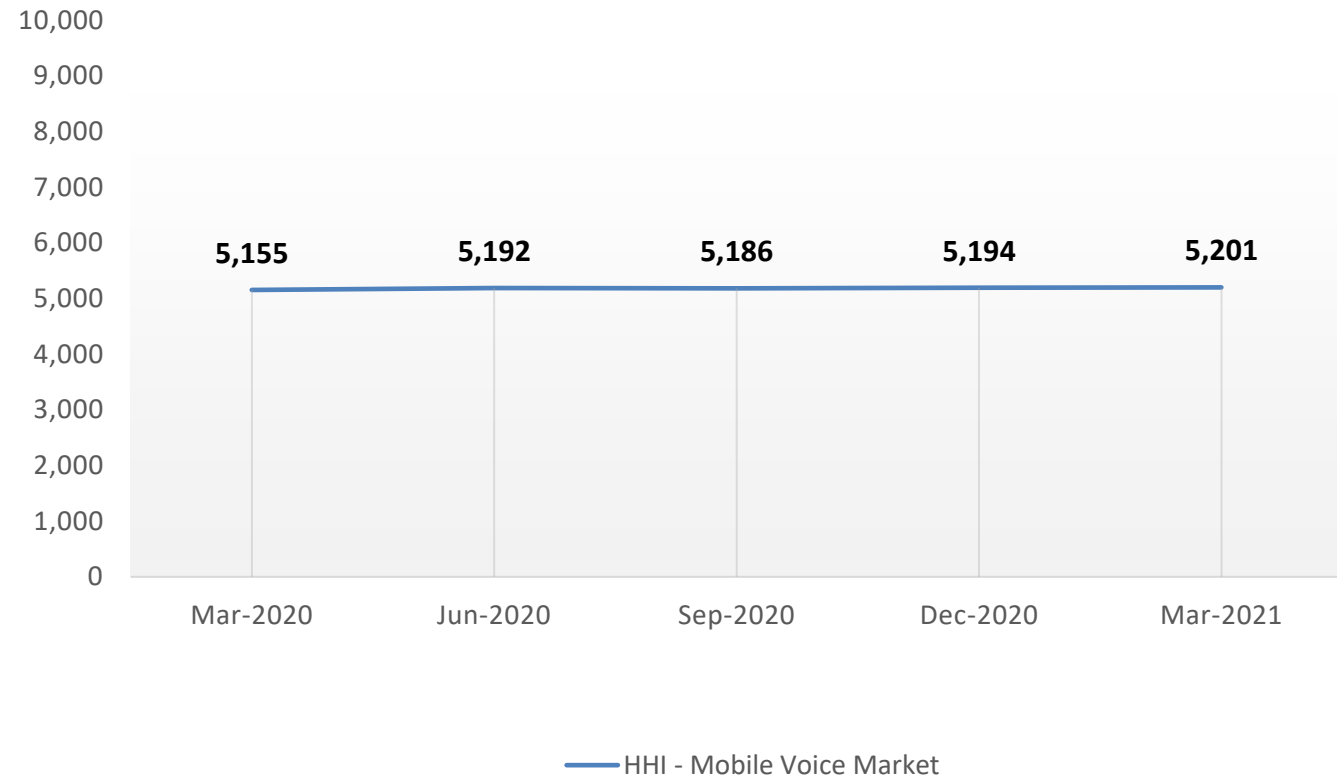
0.9%



Q-o-Q
PERCENT
CHANGE

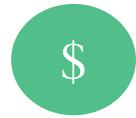
0.1%

HHI for Domestic Mobile Services
from Q1 2020 to Q1 2021



Average Revenue Per User

Mobile Services



ARPU
\$243

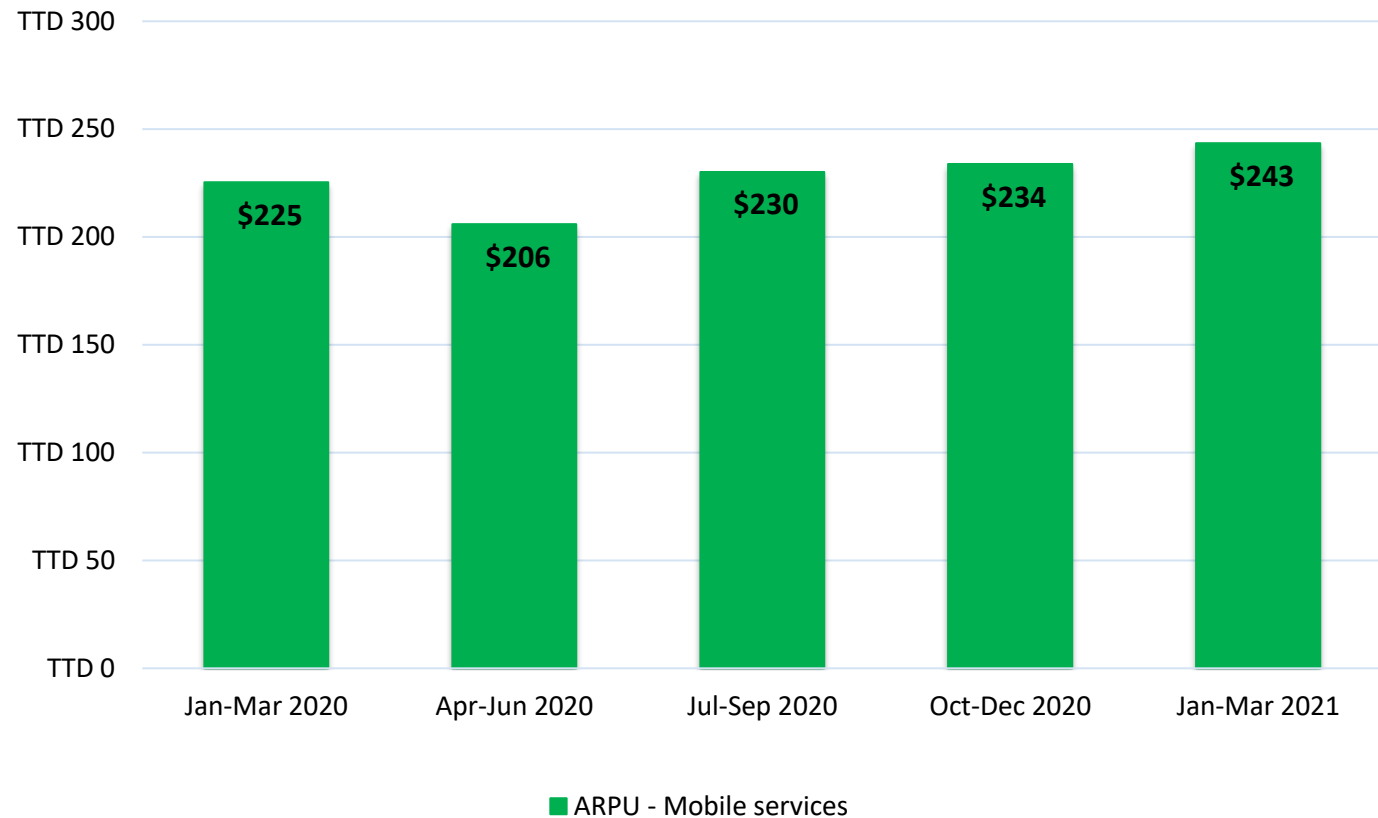


Y-o-Y
PERCENT
CHANGE
8%

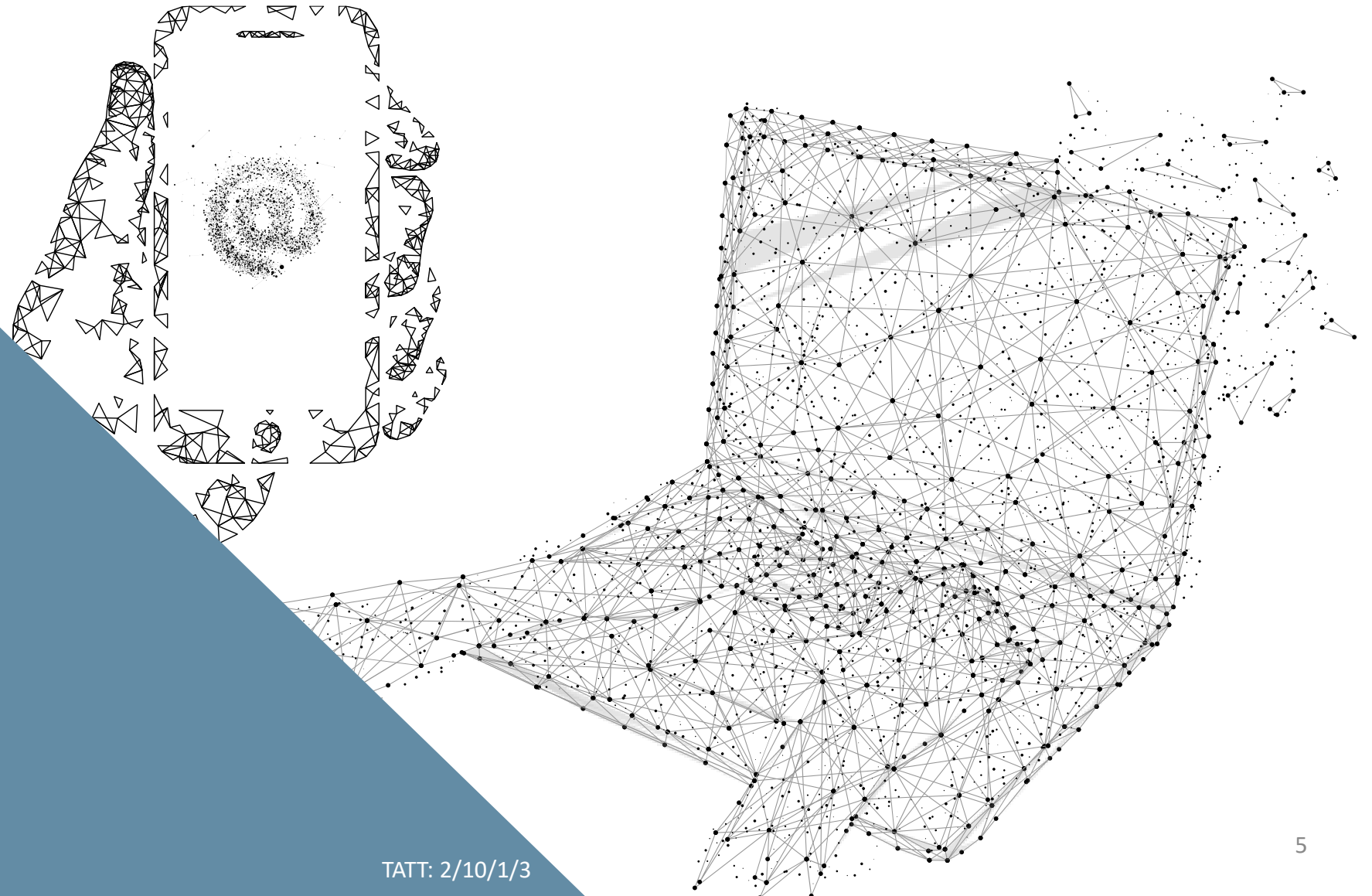


Q-o-Q
PERCENT
CHANGE
4.2%

ARPU for Domestic Mobile Services
from Q1 2020 to Q1 2021



Internet



Fixed Broadband Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

370,300



Y-o-Y PERCENT CHANGE

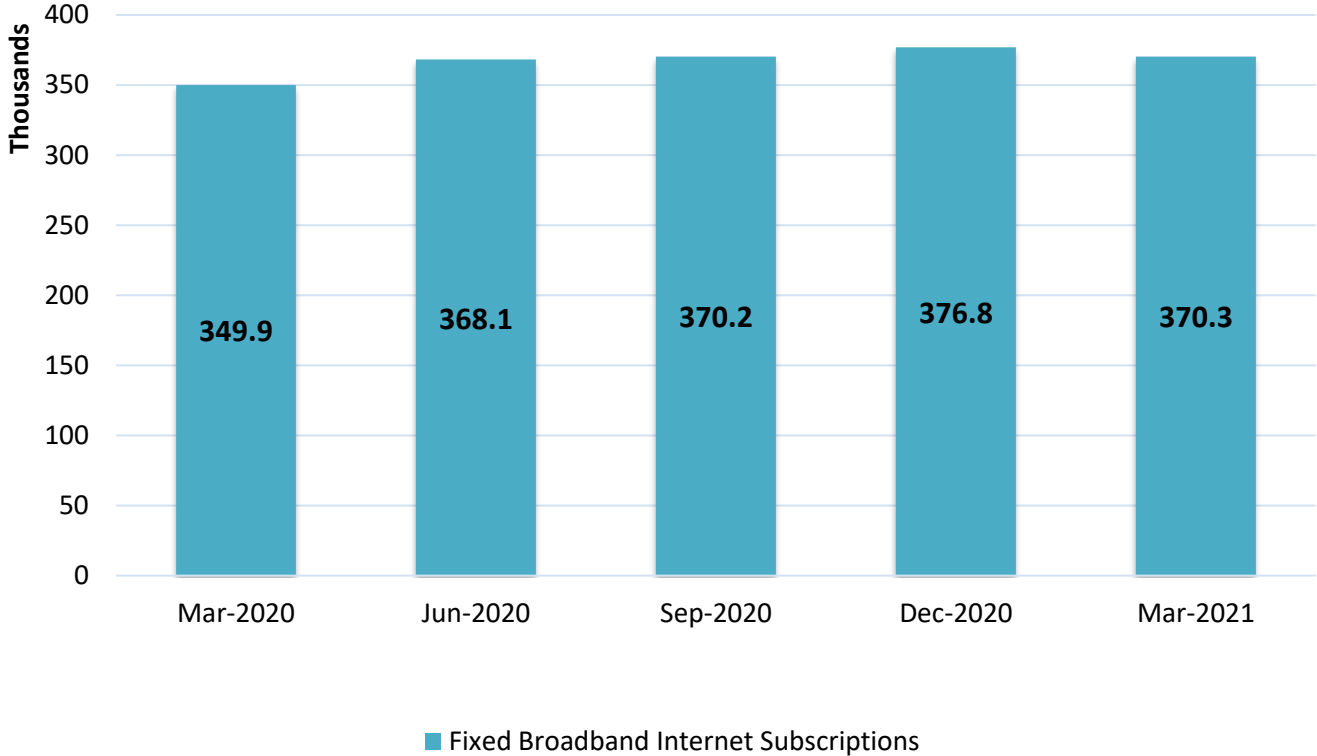
5.8%



Q-o-Q PERCENT CHANGE

-1.7%

Number of Fixed Broadband Internet Subscriptions from Q1 2020 to Q1 2021



Fixed Internet Penetration



**FIXED INTERNET
PENETRATION
PER 100
INHABITANTS**

27.1



**Y-o-Y
PERCENT
CHANGE**

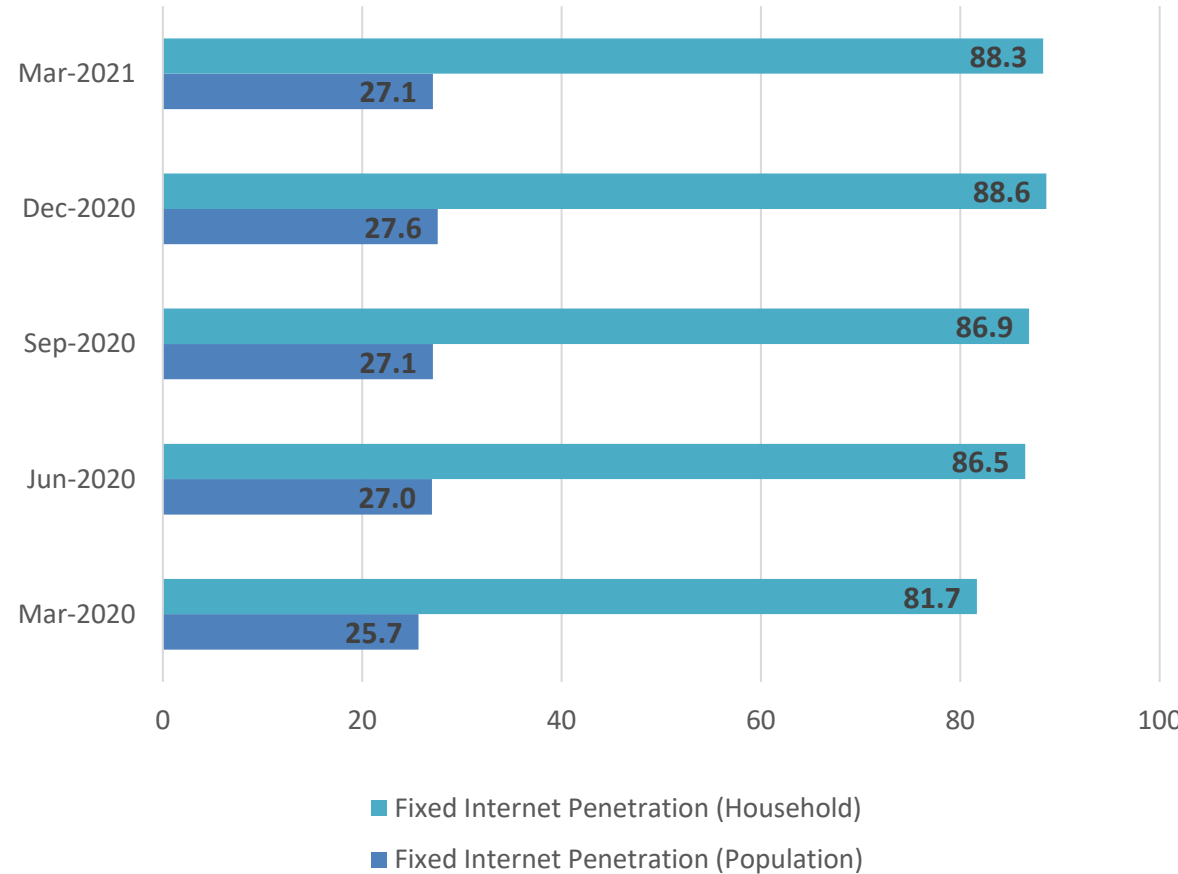
5.6%



**Q-o-Q
PERCENT
CHANGE**

-1.7%

Penetration for Fixed Internet Subscriptions
from Q1 2020 to Q1 2021



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

88.3



**Y-O-Y
PERCENT
CHANGE**

8.1%



**Q-O-Q
PERCENT
CHANGE**

-0.4%

Mobile Internet Penetration



**MOBILE INTERNET
PENETRATION PER
100 INHABITANTS**

60.6



**Y-o-Y
PERCENT
CHANGE**

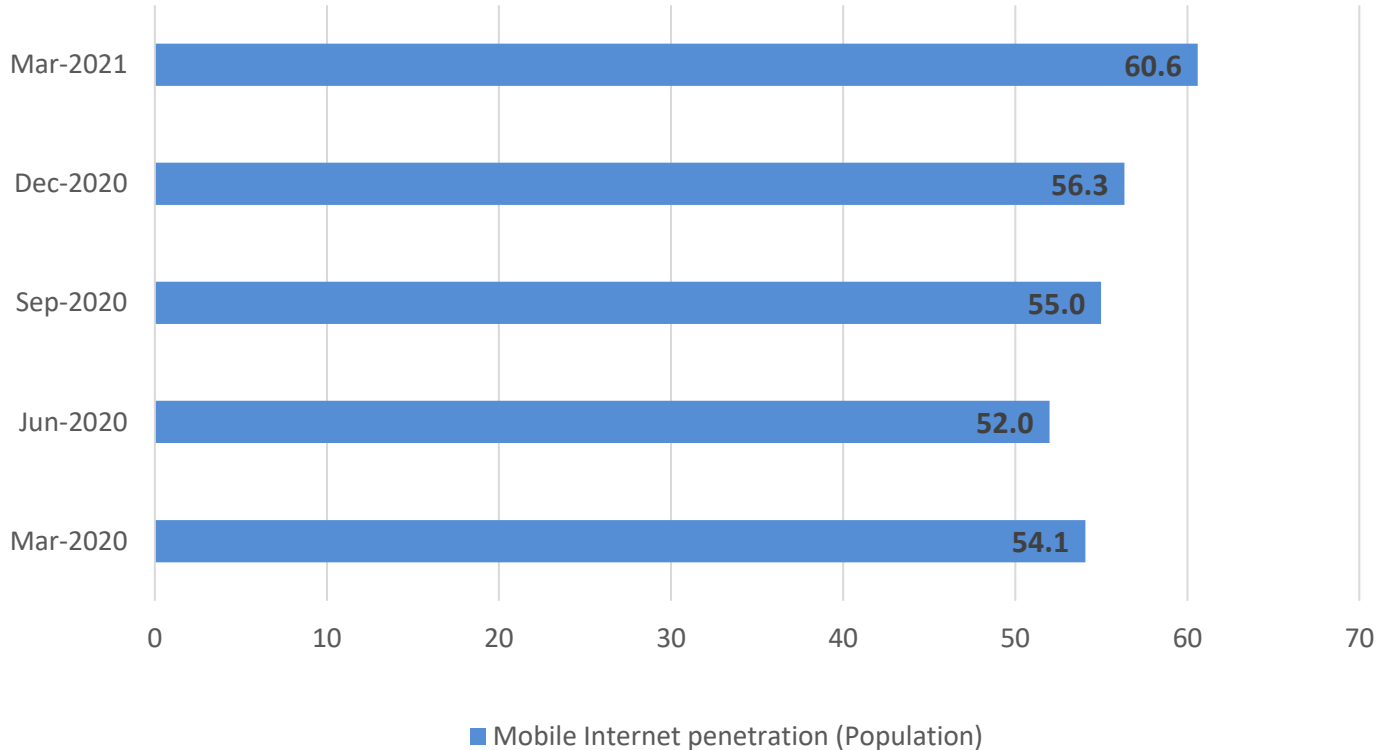
12.1 %



**Q-o-Q
PERCENT
CHANGE**

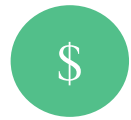
7.6%

Penetration for Mobile Internet Subscriptions
from Q1 2020 to Q1 2021



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

Fixed Internet Revenues



GROSS REVENUES
\$312m



Y-o-Y PERCENT CHANGE

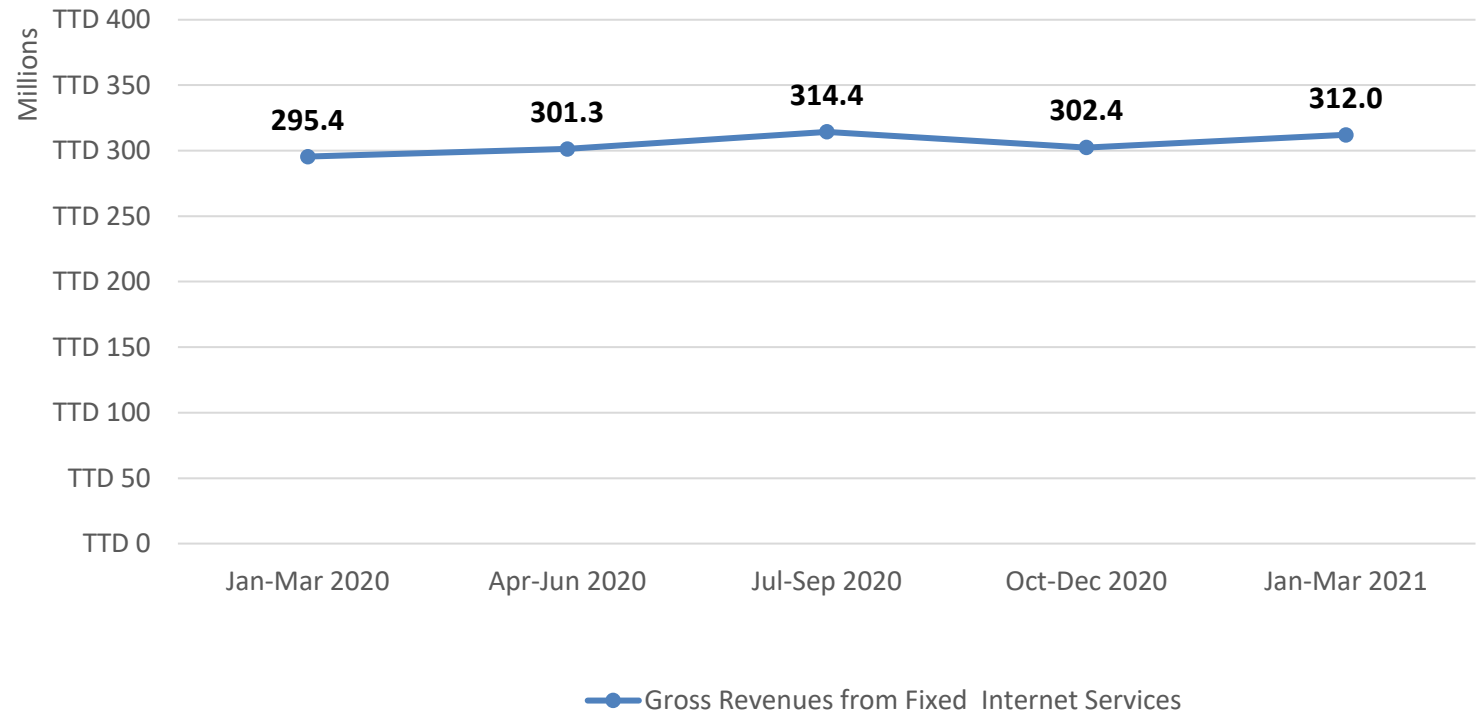
5.6%



Q-o-Q PERCENT CHANGE

3.2%

Gross Revenues from Fixed Internet Services
from Q1 2020 to Q1 2021



Fixed Internet HHI



HHI
2,884

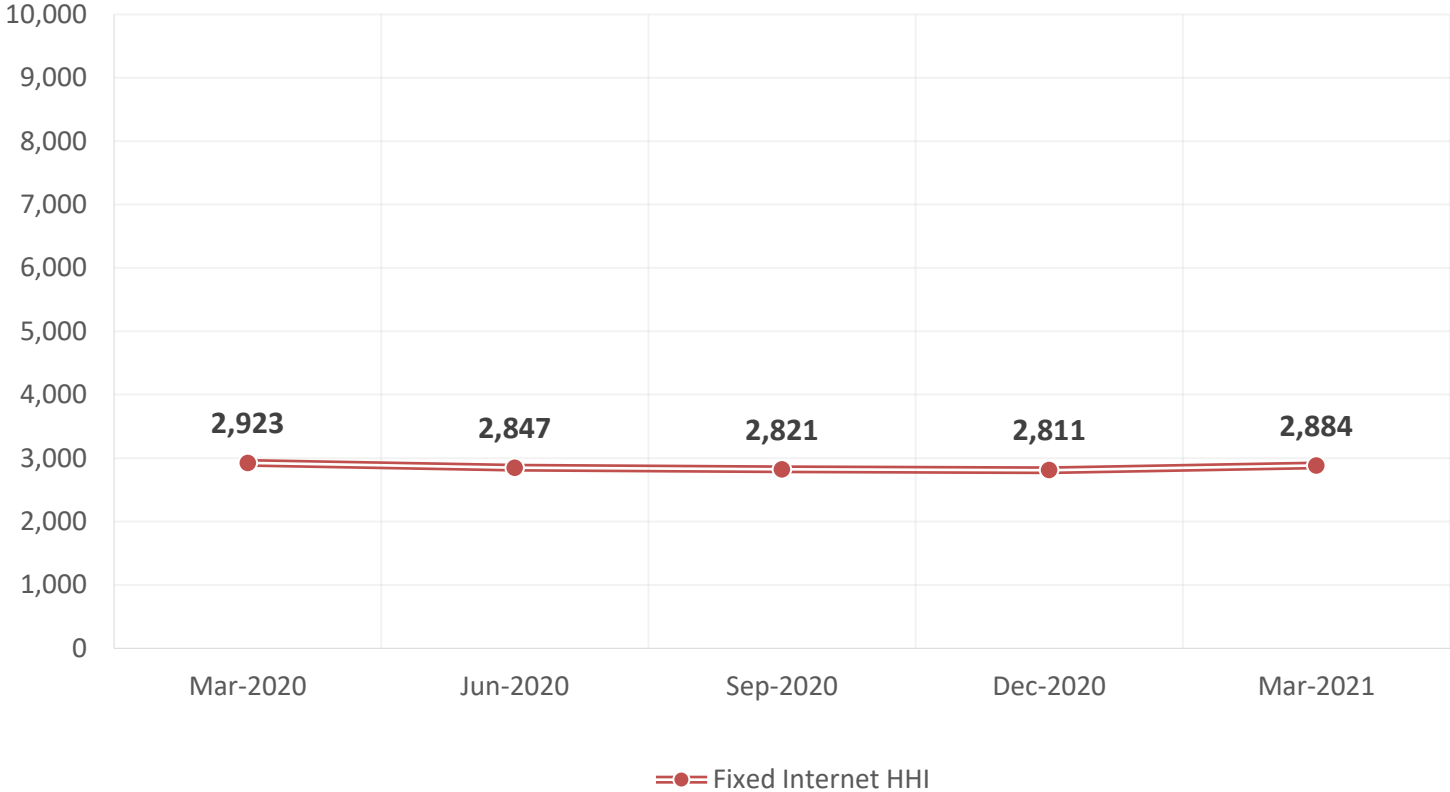


Y-o-Y
PERCENT
CHANGE
-1.3%



Q-o-Q
PERCENT
CHANGE
2.6%

HHI FOR FIXED INTERNET SERVICES
FROM Q1 2020 TO Q1 2021



Fixed Internet Average Revenue Per User



ARPU
\$847

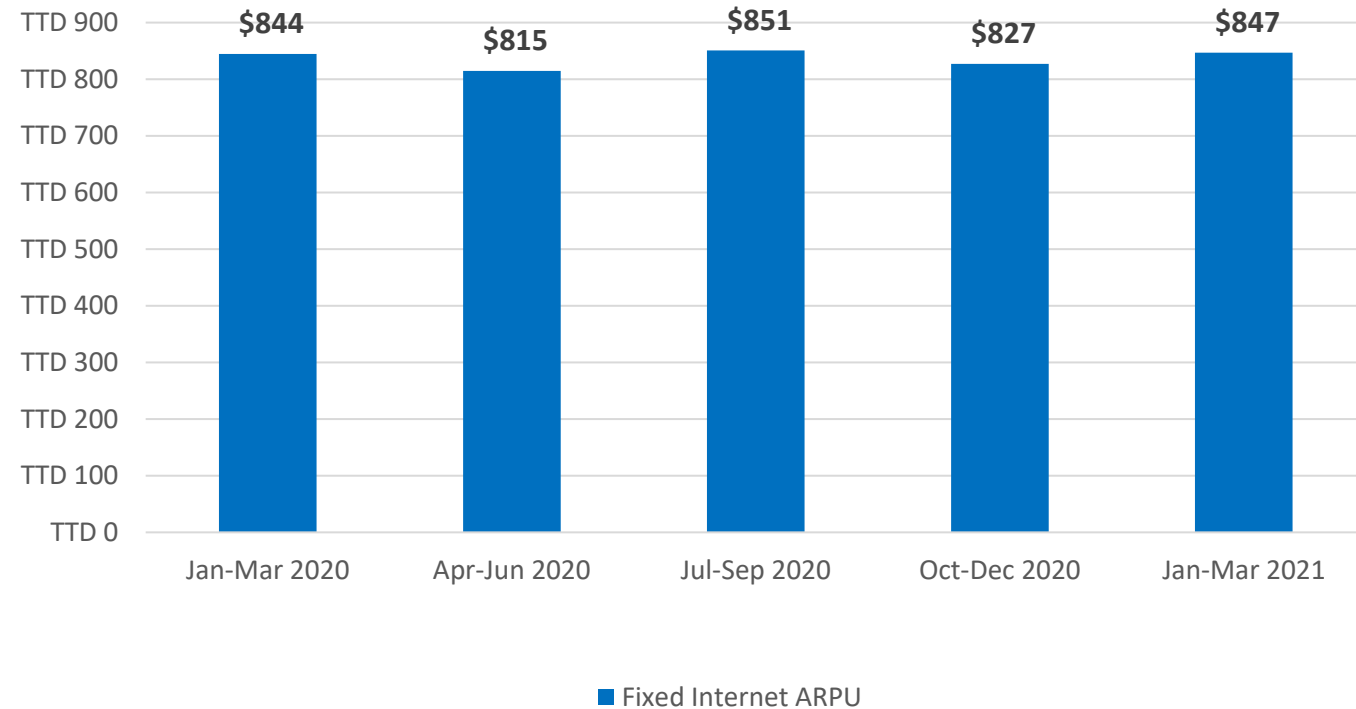


Y-o-Y
PERCENT
CHANGE
0.3%



Q-o-Q
PERCENT
CHANGE
2.4%

ARPU for Fixed Internet Services
from Q1 2020 to Q1 2021



Pay TV



Pay TV Subscriptions



TOTAL NUMBER
OF
SUBSCRIPTIONS

240,400



Y-o-Y
PERCENT
CHANGE

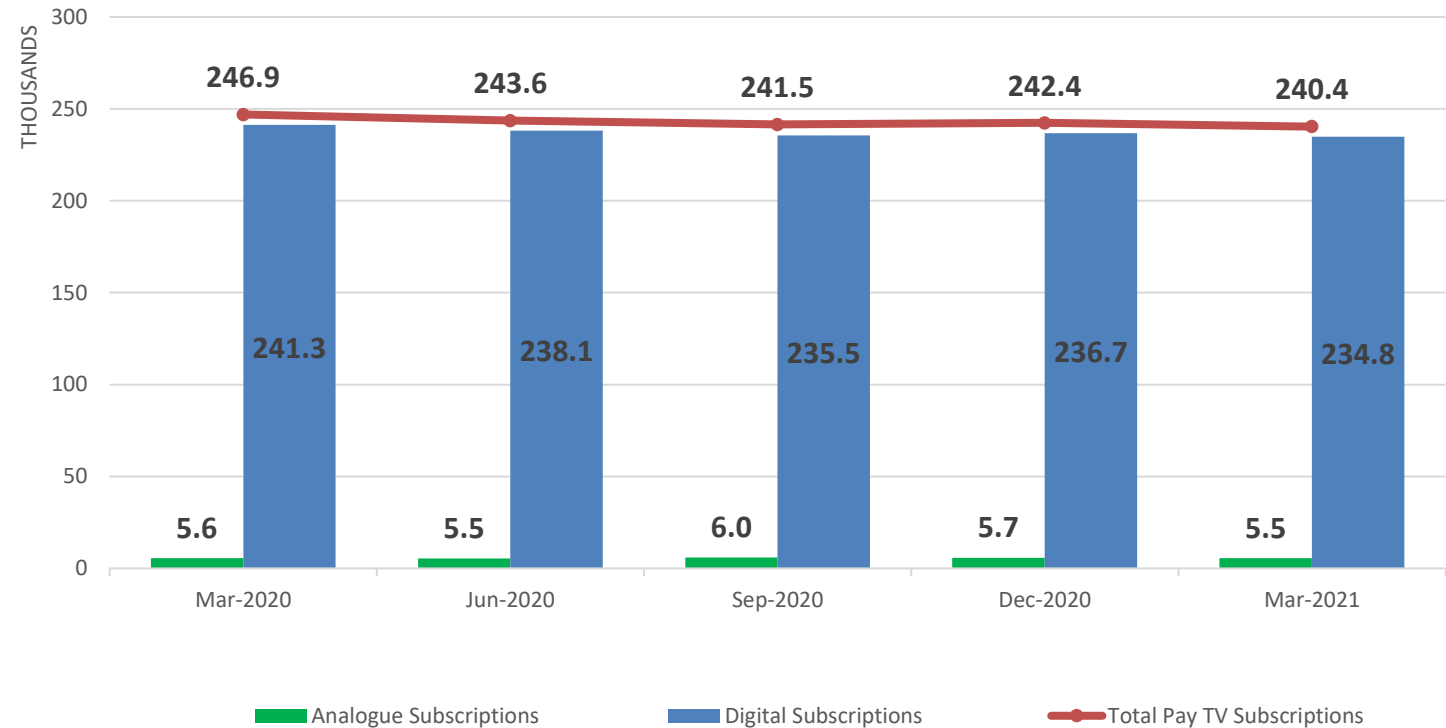
-2.6%



Q-o-Q
PERCENT
CHANGE

-0.8%

Number of Pay TV Subscriptions
from Q1 2020 to Q1 2021



Pay TV Penetration



**PAY TV
PENETRATION
PER 100
INHABITANTS**

17.4



**Y-o-Y
PERCENT
CHANGE**

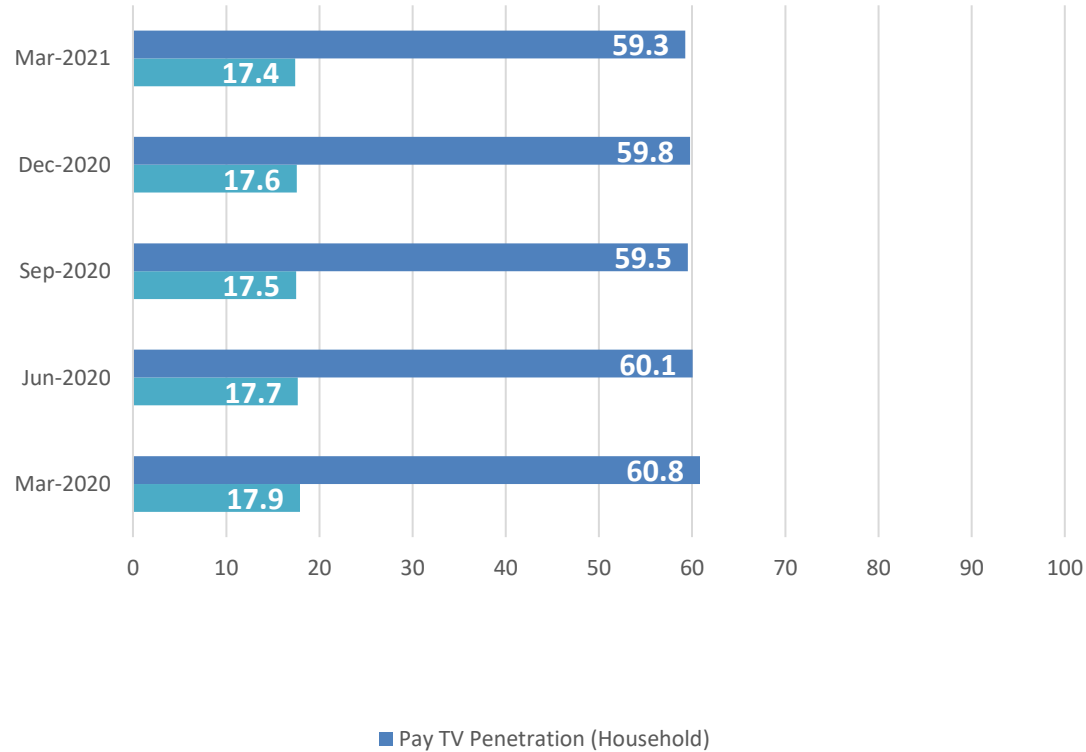
-2.7%



**Q-o-Q
PERCENT
CHANGE**

-0.8%

**Penetration Rates of Pay TV Services
from Q1 2020 to Q1 2021**



**PAY TV
PENETRATION
PER 100
HOUSEHOLDS**

59.3



**Y-O-Y
PERCENT
CHANGE**

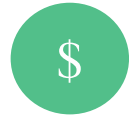
-2.5%



**Q-O-Q
PERCENT
CHANGE**

-0.8%

Pay TV Revenues



GROSS REVENUES

\$162.1m



Y-o-Y PERCENT CHANGE

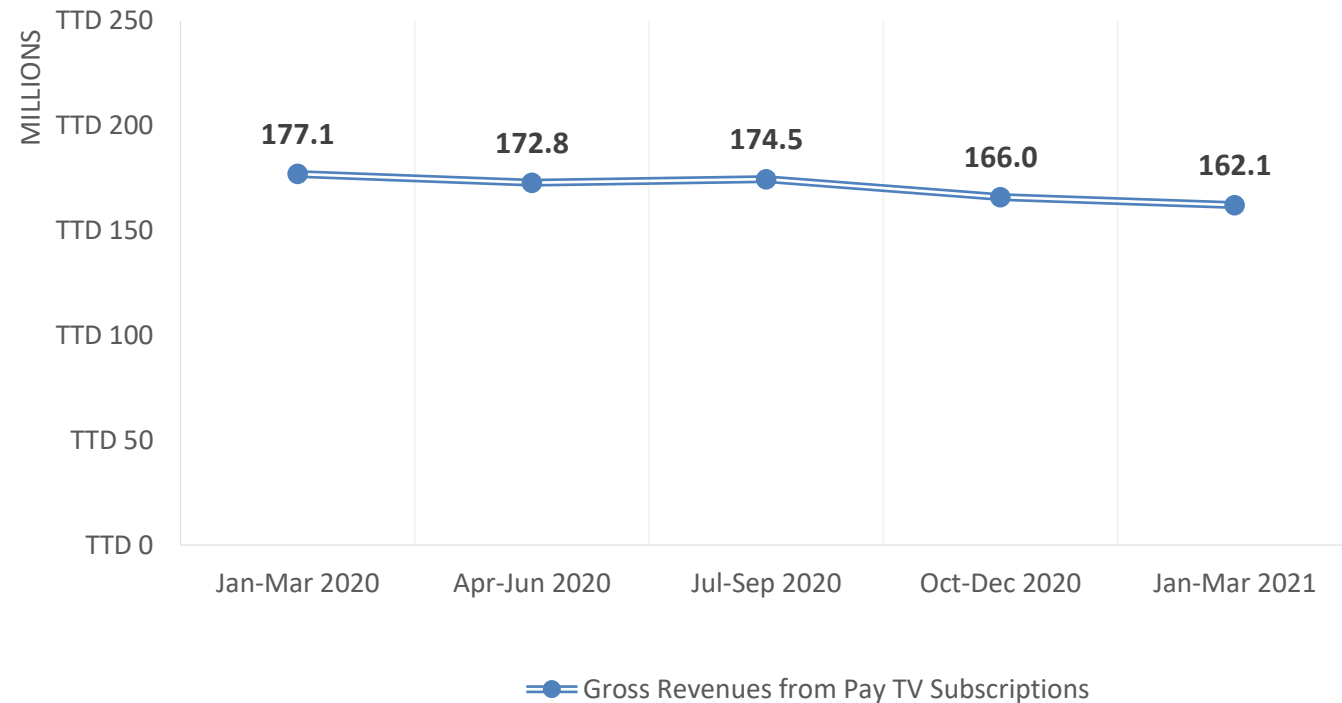
-8.4%



Q-o-Q PERCENT CHANGE

-2.3%

GROSS REVENUES FROM PAY TV SERVICES FROM Q1 2020 TO Q1 2021



Pay TV HHI



HHI
3,268

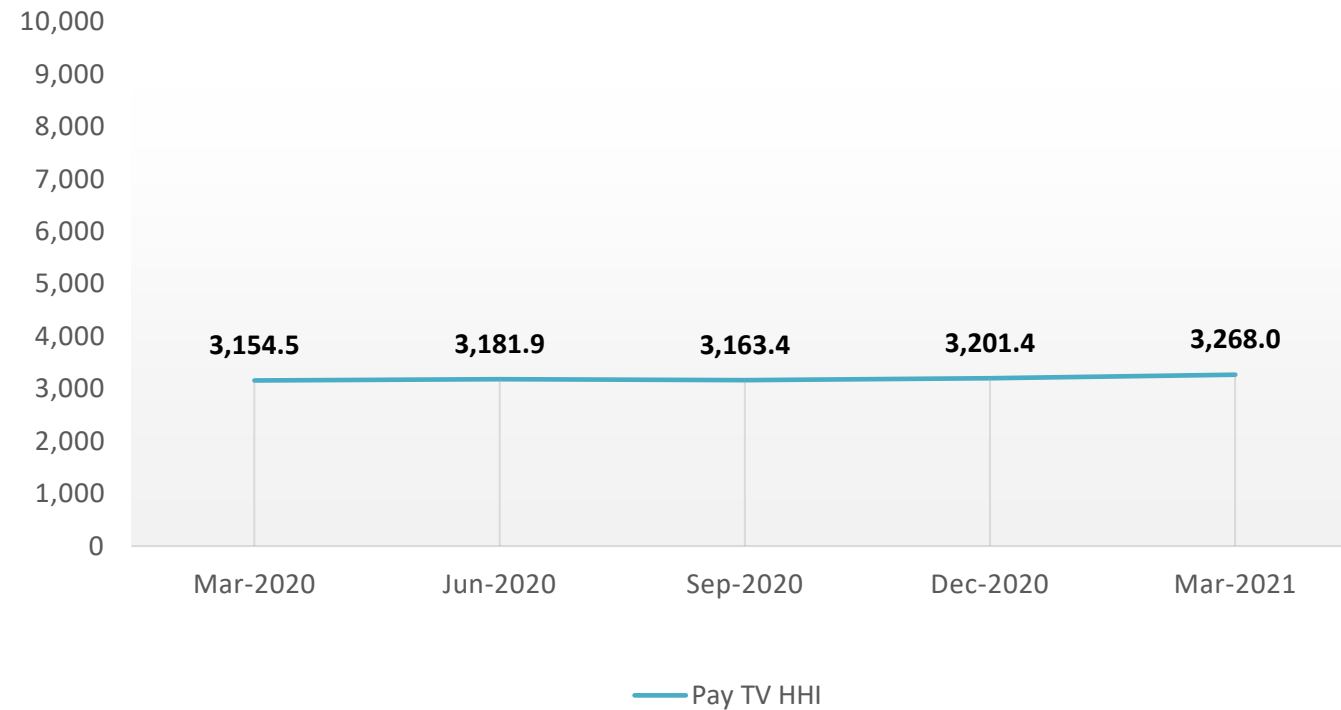


Y-o-Y
PERCENT
CHANGE
3.6%



Q-o-Q
PERCENT
CHANGE
2.1%

HHI for Pay TV Services
from Q1 2020 to Q1 2021



Pay TV

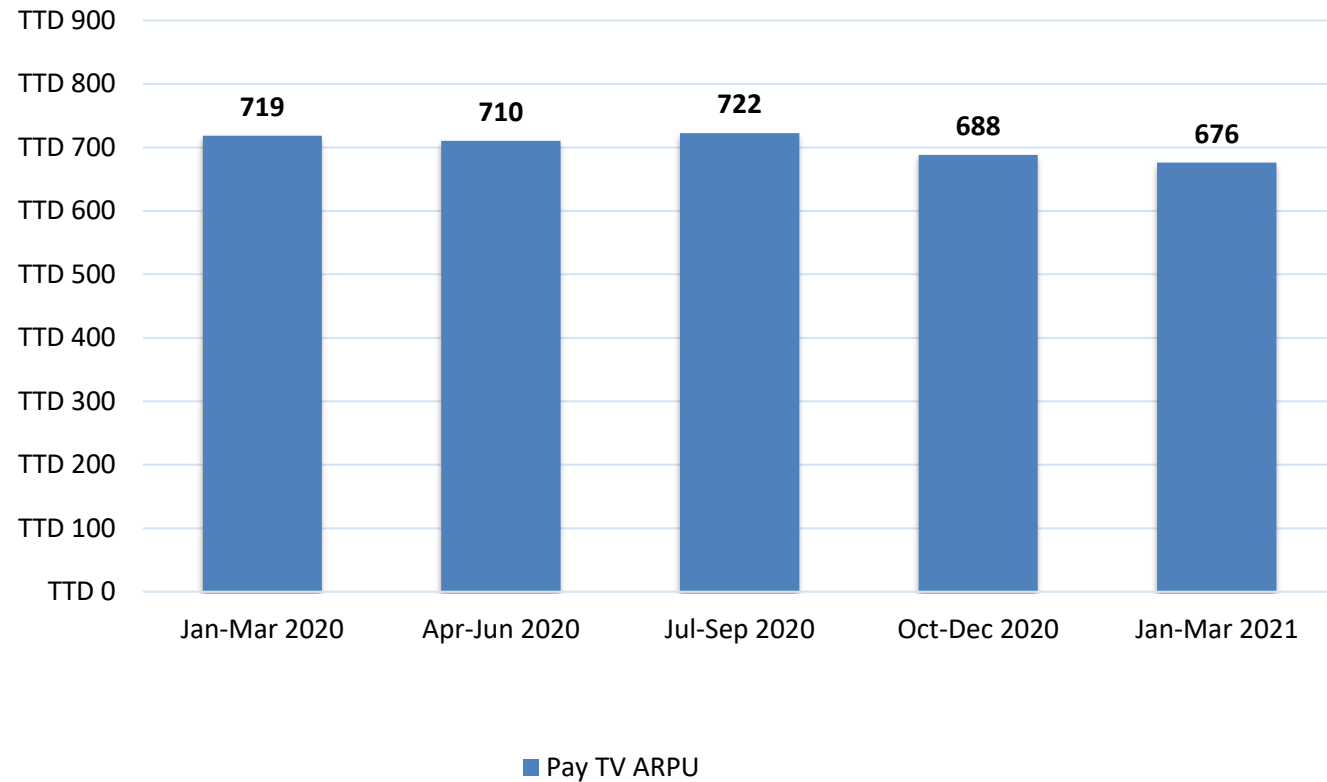
Average Revenue Per User

ARPU
\$ **\$676**

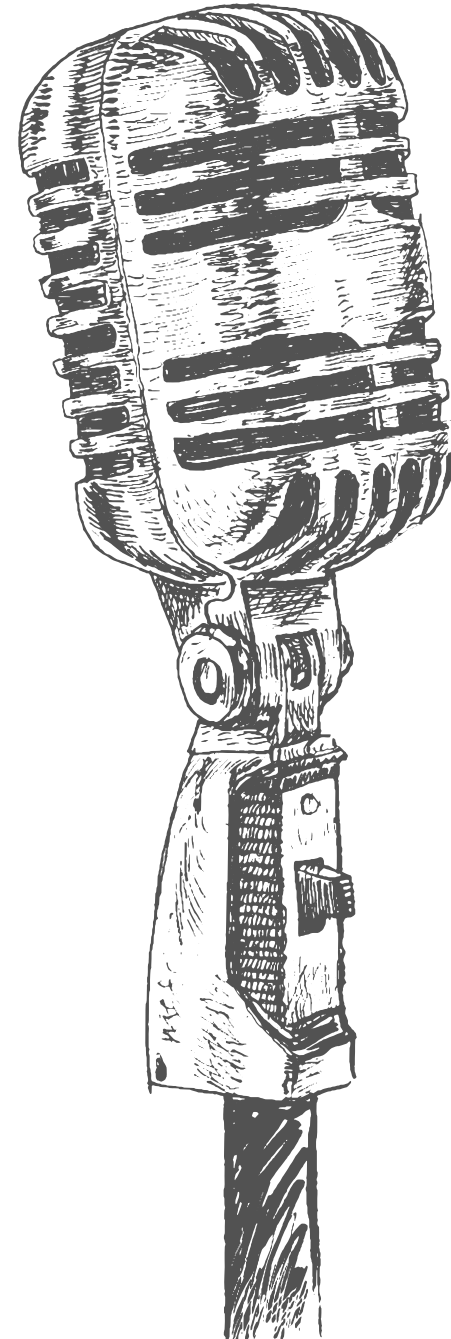
Y-o-Y
PERCENT
CHANGE
-5.9%

Q-o-Q
PERCENT
CHANGE
-1.8%

ARPU for Pay TV Services
from Q1 2020 to Q1 2021



Free-to-Air Radio



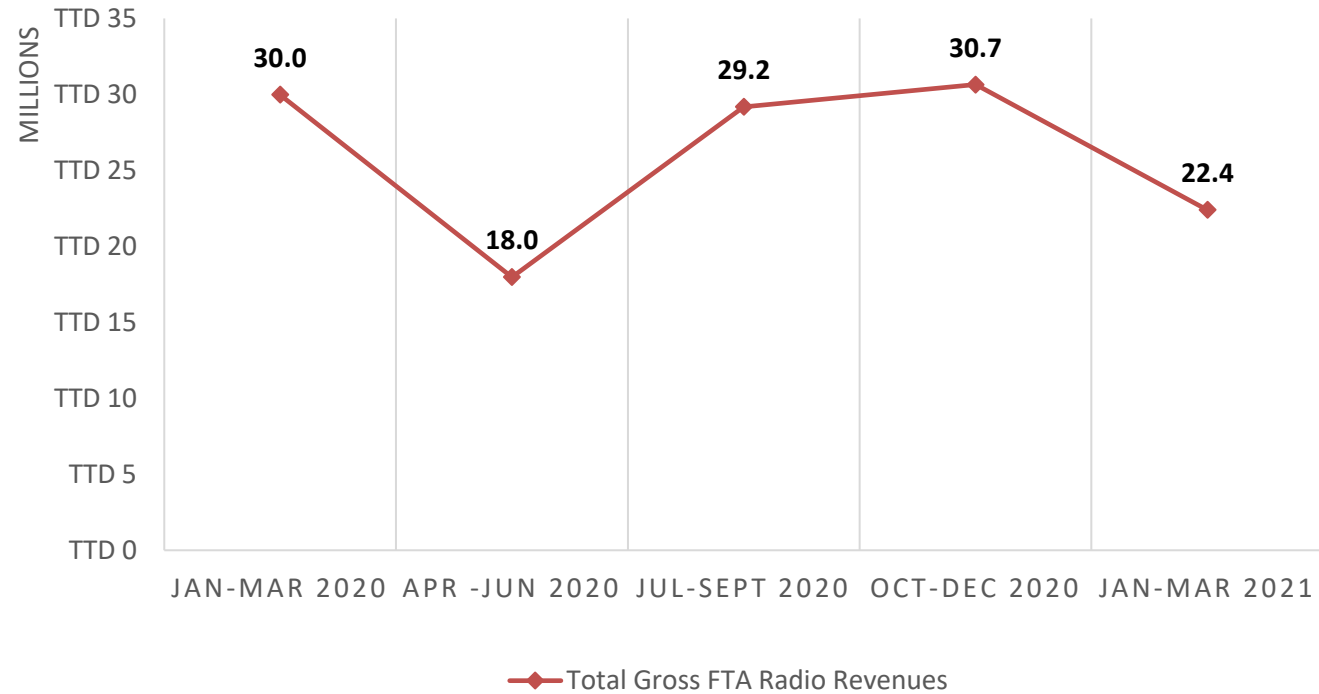
Free-to-Air Radio Revenues

\$ **GROSS REVENUES**
\$22.4m

Y-o-Y PERCENT CHANGE
-25.3%

Q-o-Q PERCENT CHANGE
-26.9%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q1 2020 TO Q1 2021



** Data estimated for the following concessionaires who had not submitted data at the date of publication: Family Focus, PBCT 104.7FM, Trinibashment Limited and Upward Trend Entertainment Limited*

Free-to-Air Radio HHI



HHI
479

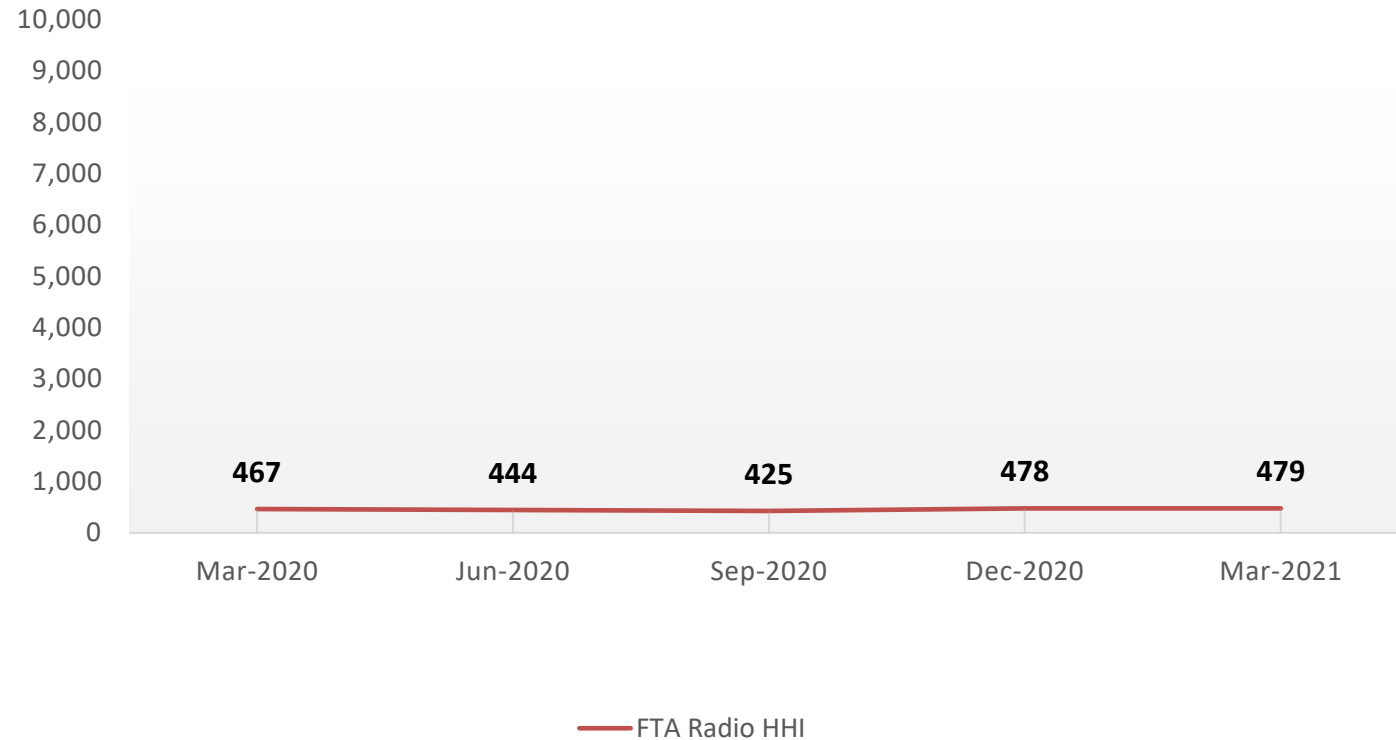


Y-o-Y
PERCENT
CHANGE
2.6%



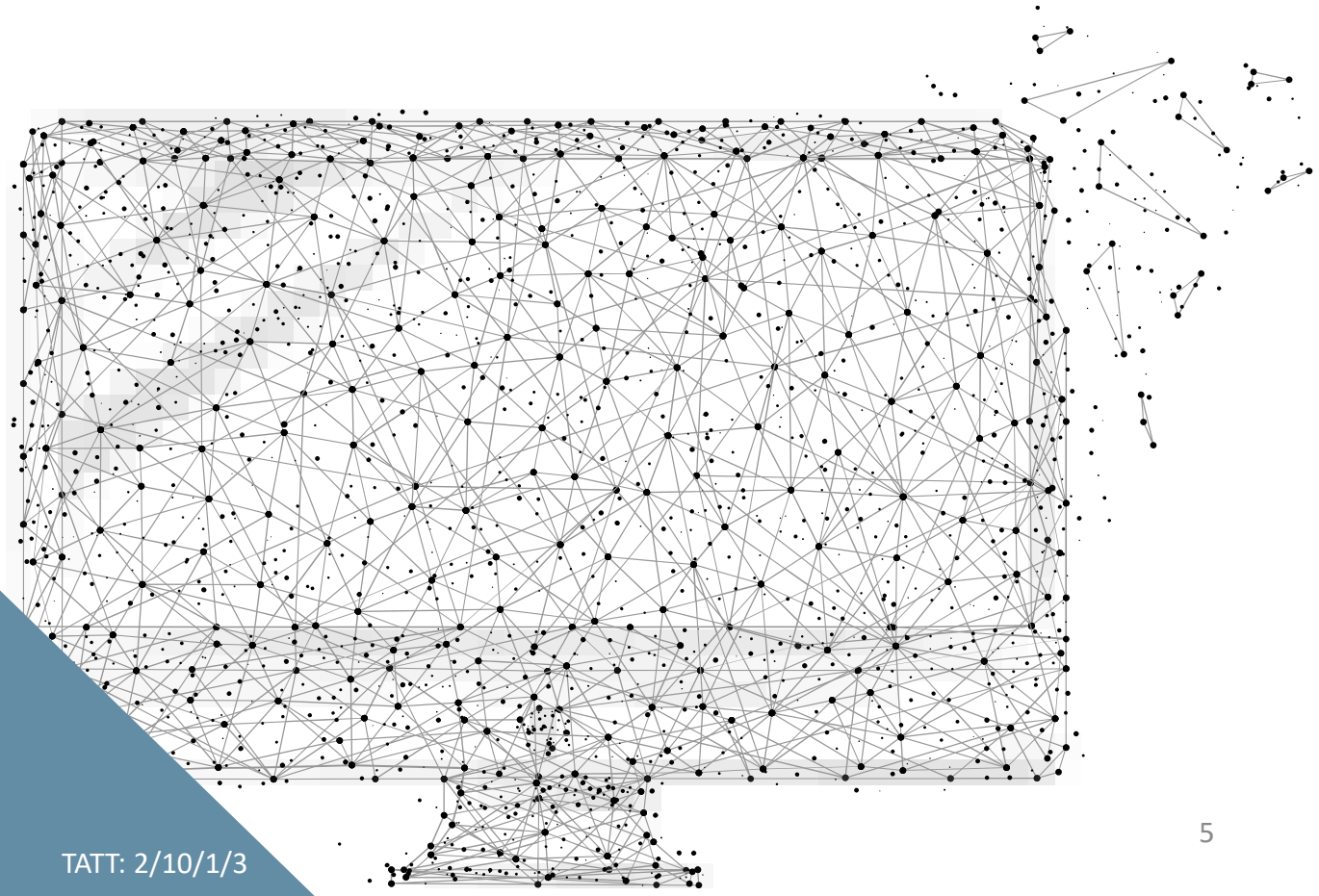
Q-o-Q
PERCENT
CHANGE
0.2%

HHI for Free to Air Radio Services
from Q1 2020 to Q1 2021



** Data estimated for the following concessionaires who had not submitted data at the date of publication: Family Focus, PBCT 104.7FM, Trinibashment Limited and Upward Trend Entertainment Limited*

Free-to-Air TV



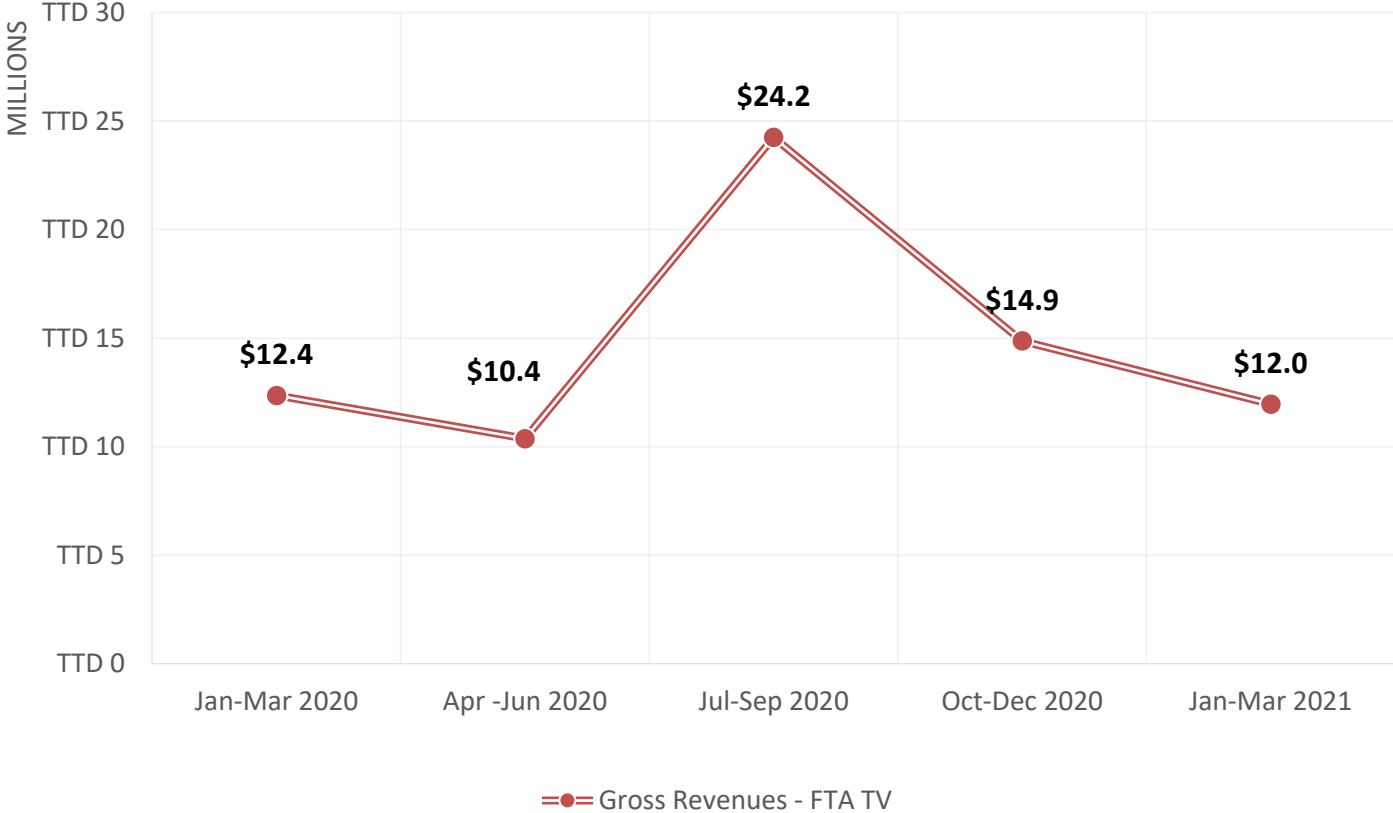
Free-to-Air TV Revenues

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q1 2020 TO Q1 2021

\$
GROSS REVENUES
\$12m

Y-o-Y PERCENT CHANGE
-3.2%

Q-o-Q PERCENT CHANGE
-19.6%



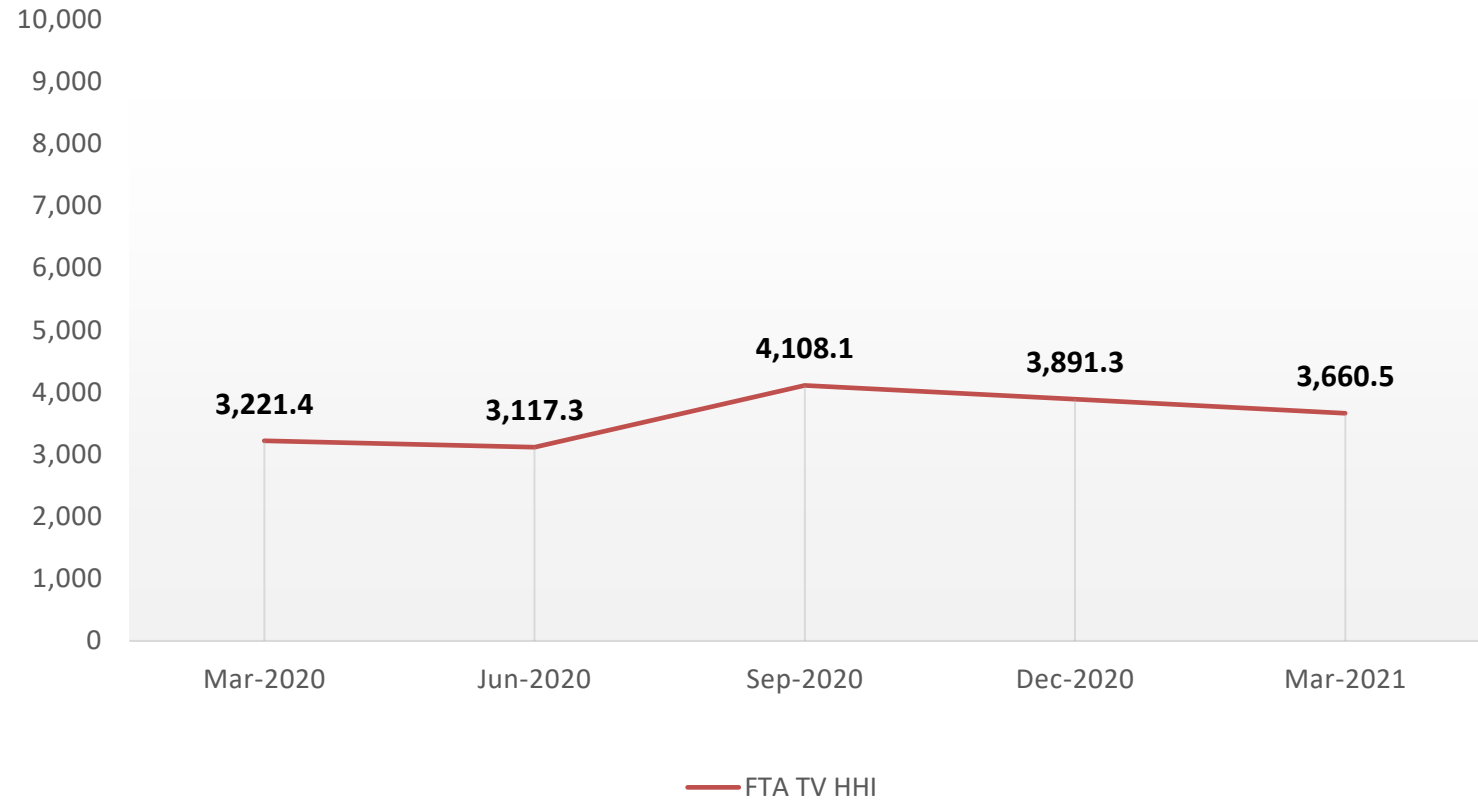
Free-to-Air TV HHI

HHI
3,660.5

**Y-o-Y
PERCENT
CHANGE**
13.6%

**Q-o-Q
PERCENT
CHANGE**
-5.9%

HHI for Free to Air TV Services
from Q1 2020 to Q1 2021



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