

# QUARTERLY MARKET UPDATE

April to June 2021



## Quarterly Market Update – Q2 2021

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TATT: 2/10/1/3

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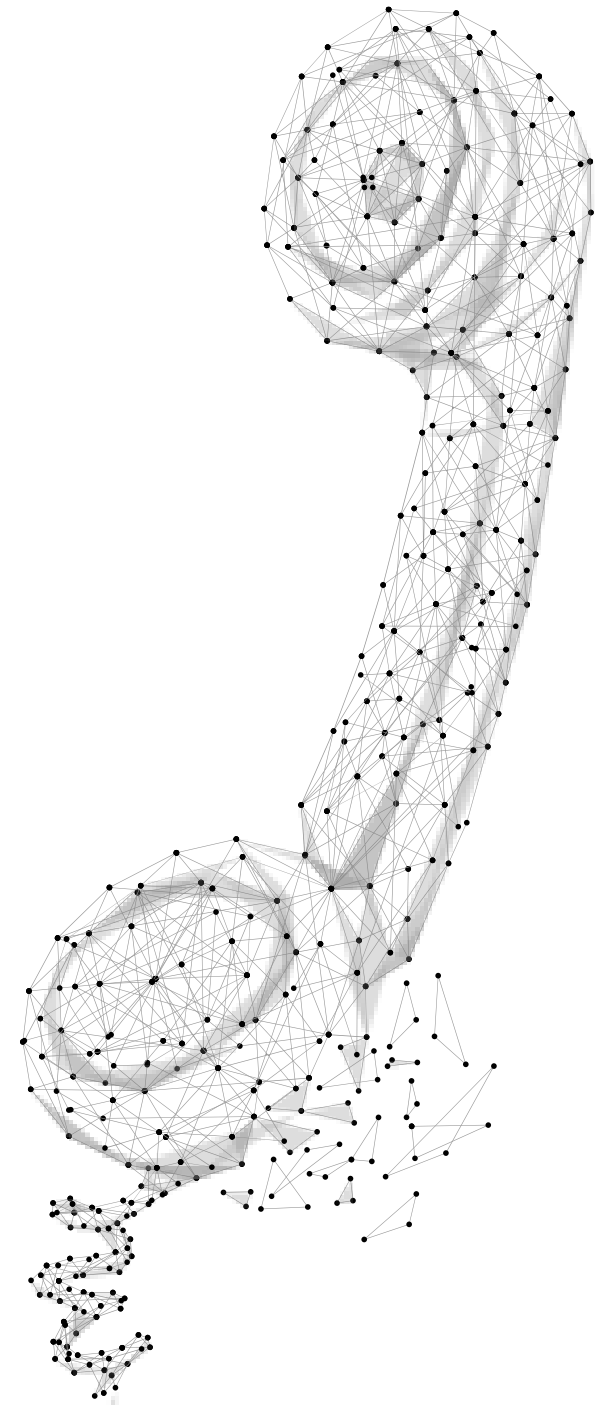
**Free-to-Air TV Market**

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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 population figures:**
  - a) 1,367,558 (2021 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**

**323,500**



**Y-o-Y PERCENT CHANGE**

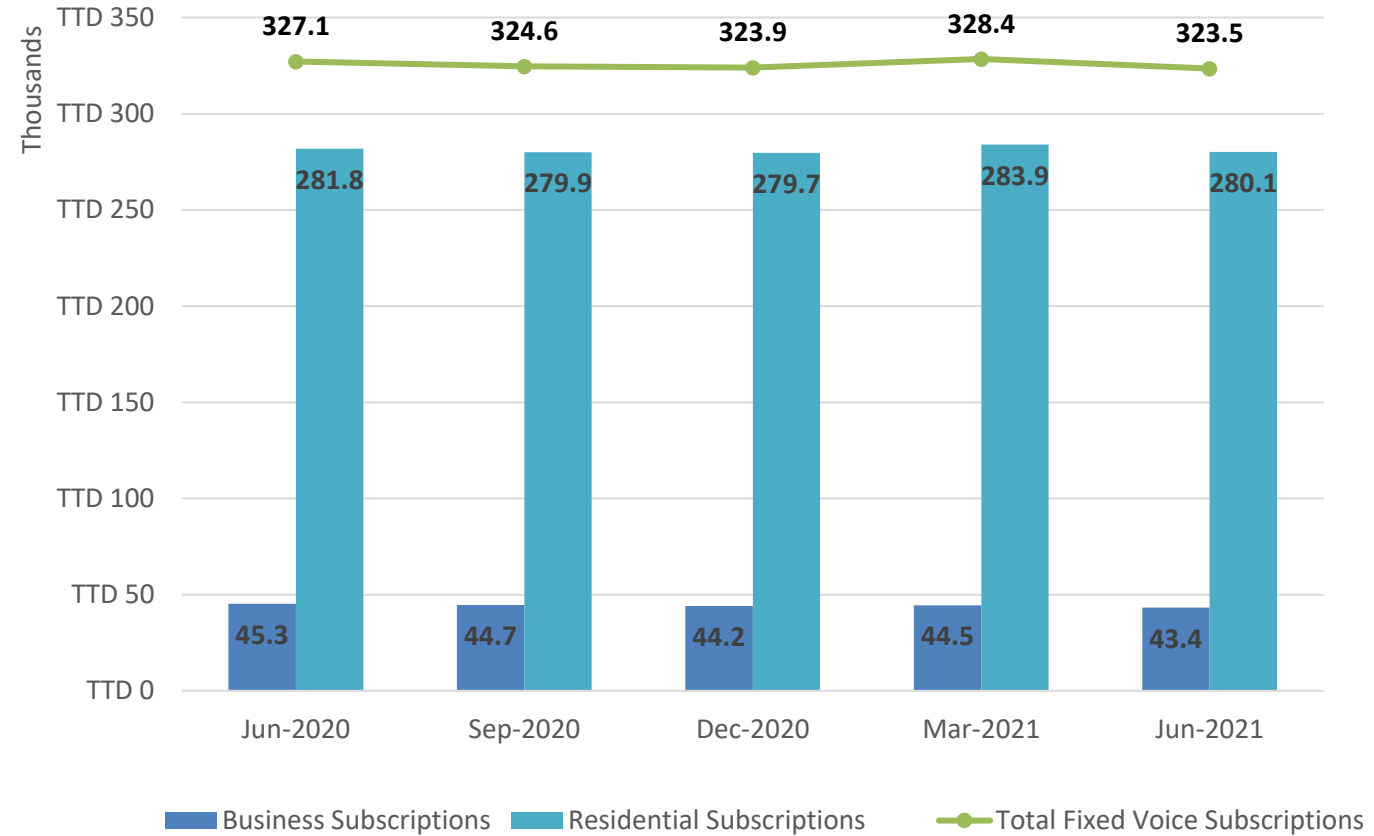
**-1.1%**



**Q-o-Q PERCENT CHANGE**

**-1.5%**

Number of Fixed Line Subscriptions  
Q2 2020 to Q2 2021



# Fixed Voice Penetration



**FIXED VOICE  
PENETRATION PER  
100 INHABITANTS**

**23.7**



**Y-o-Y  
PERCENT  
CHANGE**

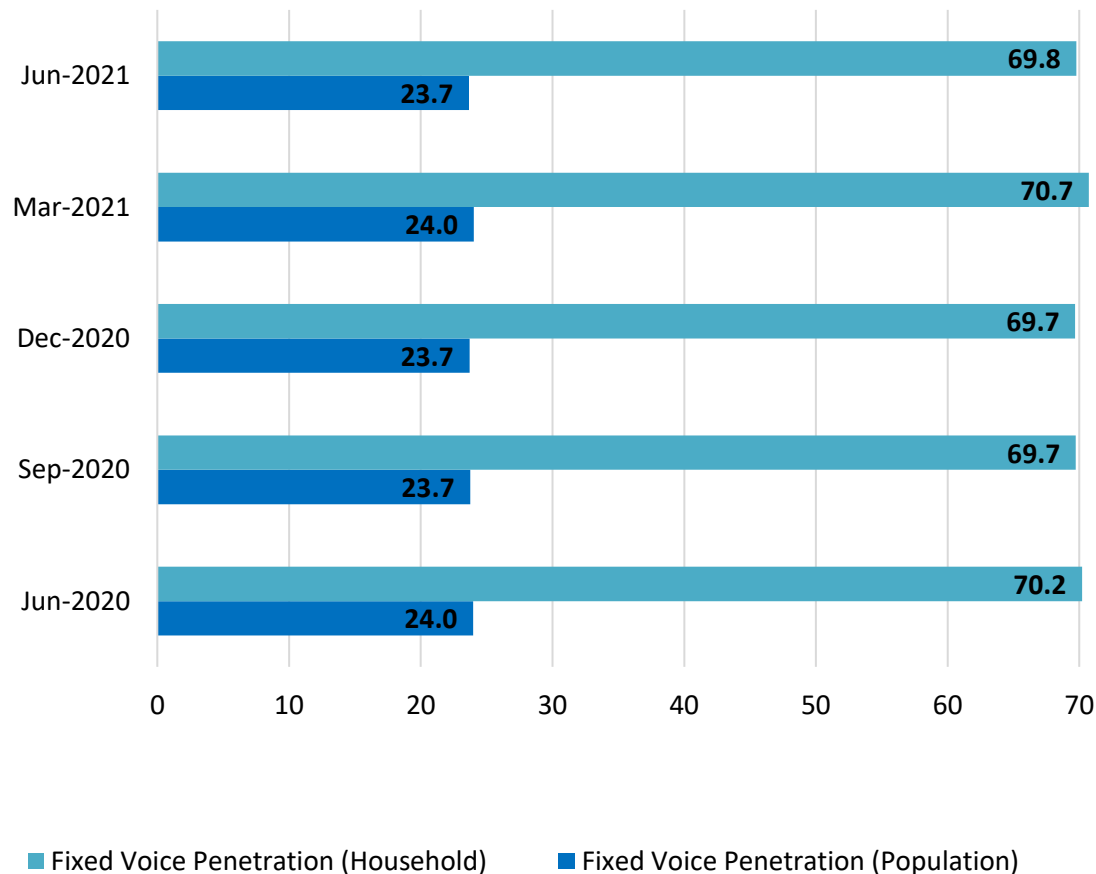
**-1.4%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.6%**

Penetration Rate of Fixed Line Subscriptions  
from Q2 2020 to Q2 2021



**FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS**

**69.8**



**Y-o-Y  
PERCENT  
CHANGE**

**-0.6%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.3%**

# Fixed Voice Revenues



**GROSS REVENUES**

**\$ 109.1m**



**Y-o-Y PERCENT CHANGE**

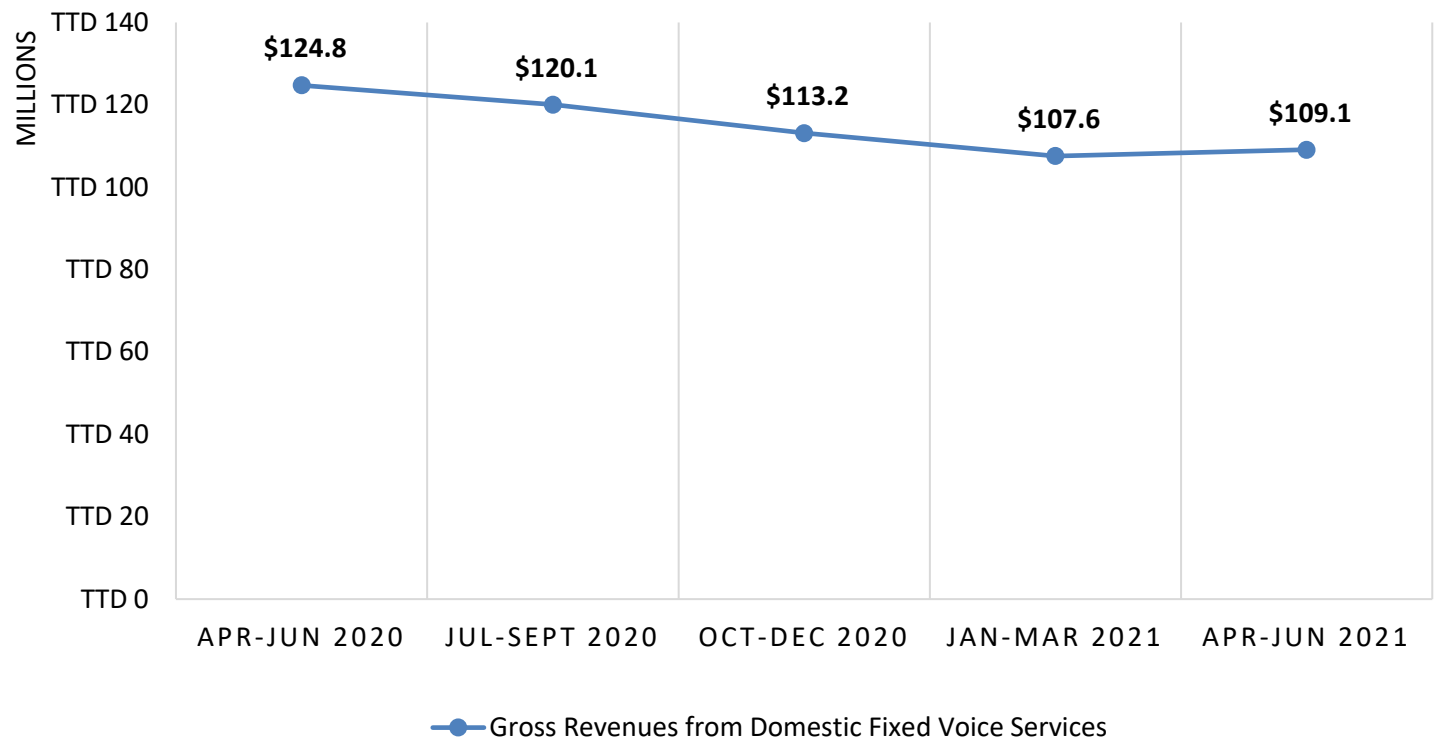
**-12.6%**



**Q-o-Q PERCENT CHANGE**

**1.4%**

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q2 2020 TO Q2 2021





# Fixed Voice HHI



HHI

3,352



Y-o-Y  
PERCENT  
CHANGE

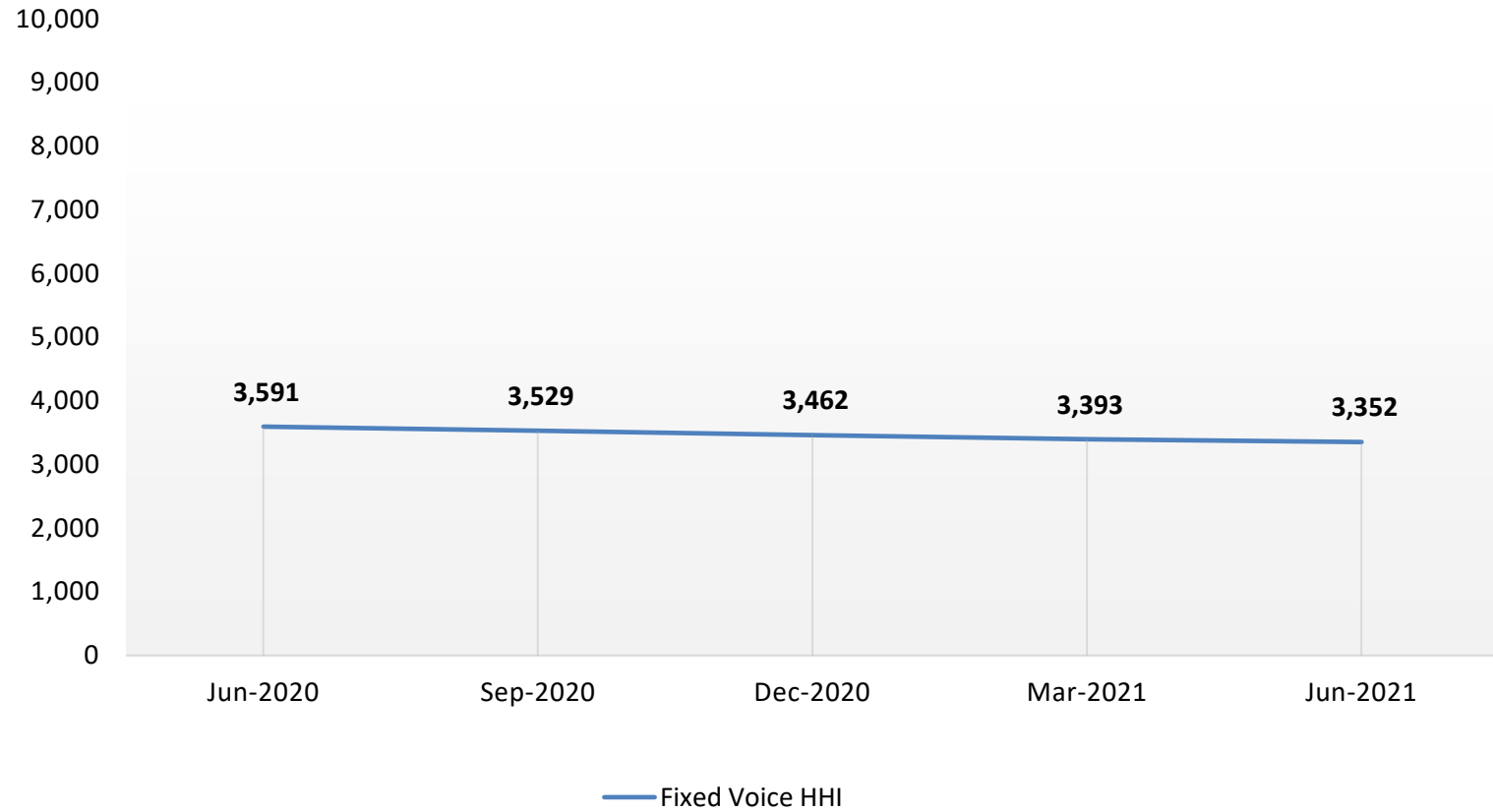
-6.7%



Q-o-Q  
PERCENT  
CHANGE

-1.2%

HHI for Domestic Fixed Line  
from Q2 2020 to Q2 2021



# Fixed Voice Average Revenue Per User



ARPU  
**\$336**



Y-o-Y  
PERCENT  
CHANGE

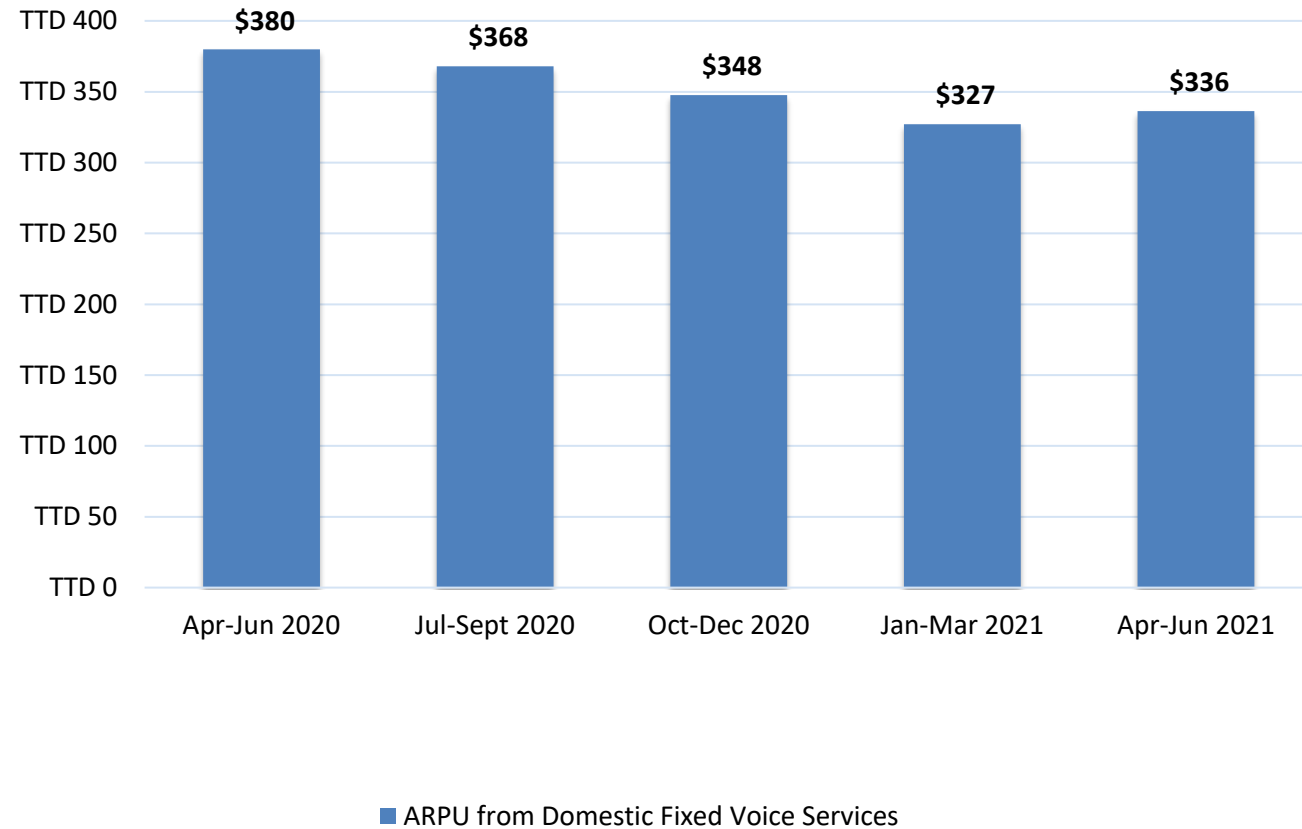
**-11.4%**



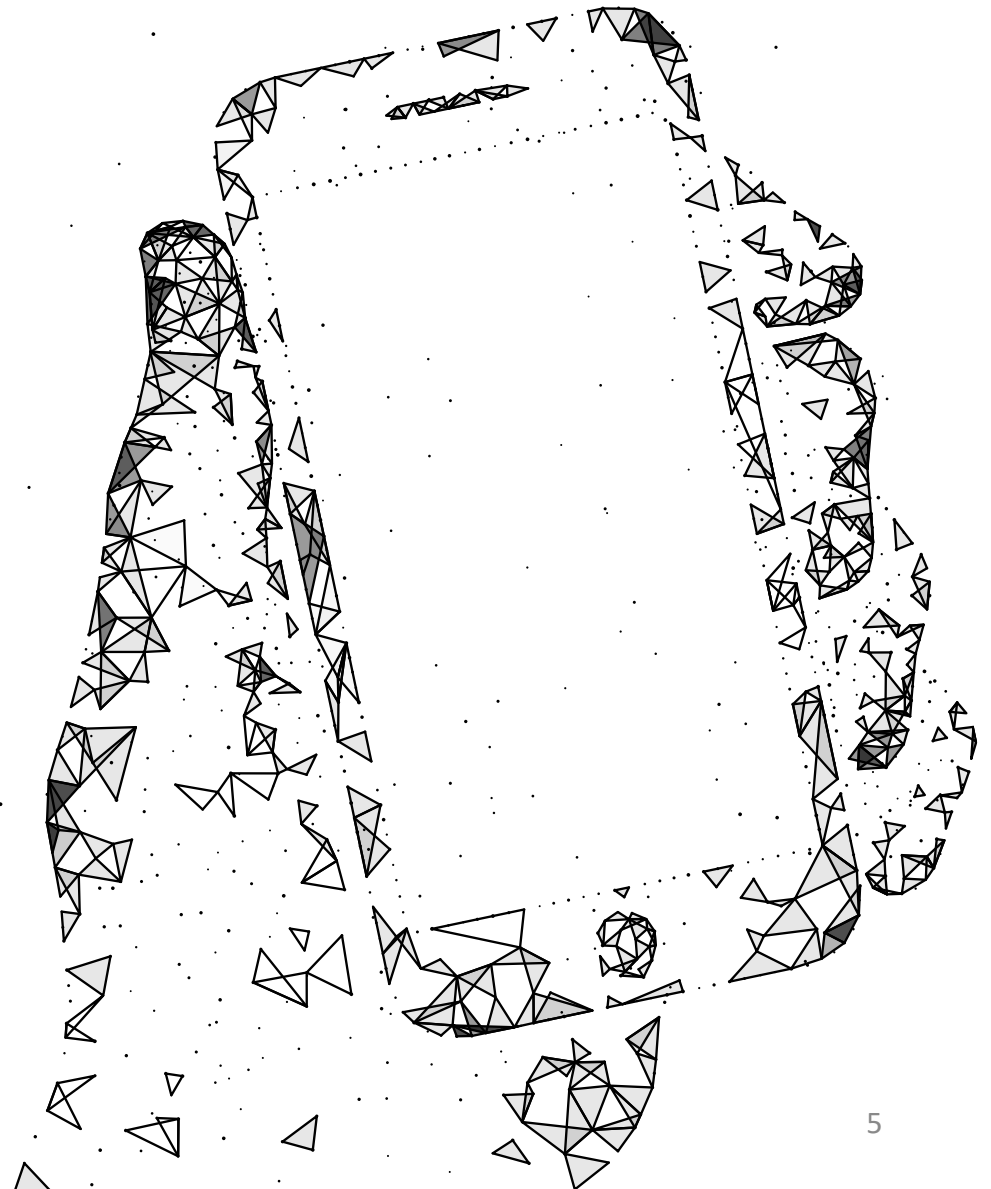
Q-o-Q  
PERCENT  
CHANGE

**2.8%**

ARPU from Domestic Fixed Voice Services  
from Q2 2020 to Q2 2021



# Mobile Voice



# Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,897,200



Y-o-Y PERCENT CHANGE

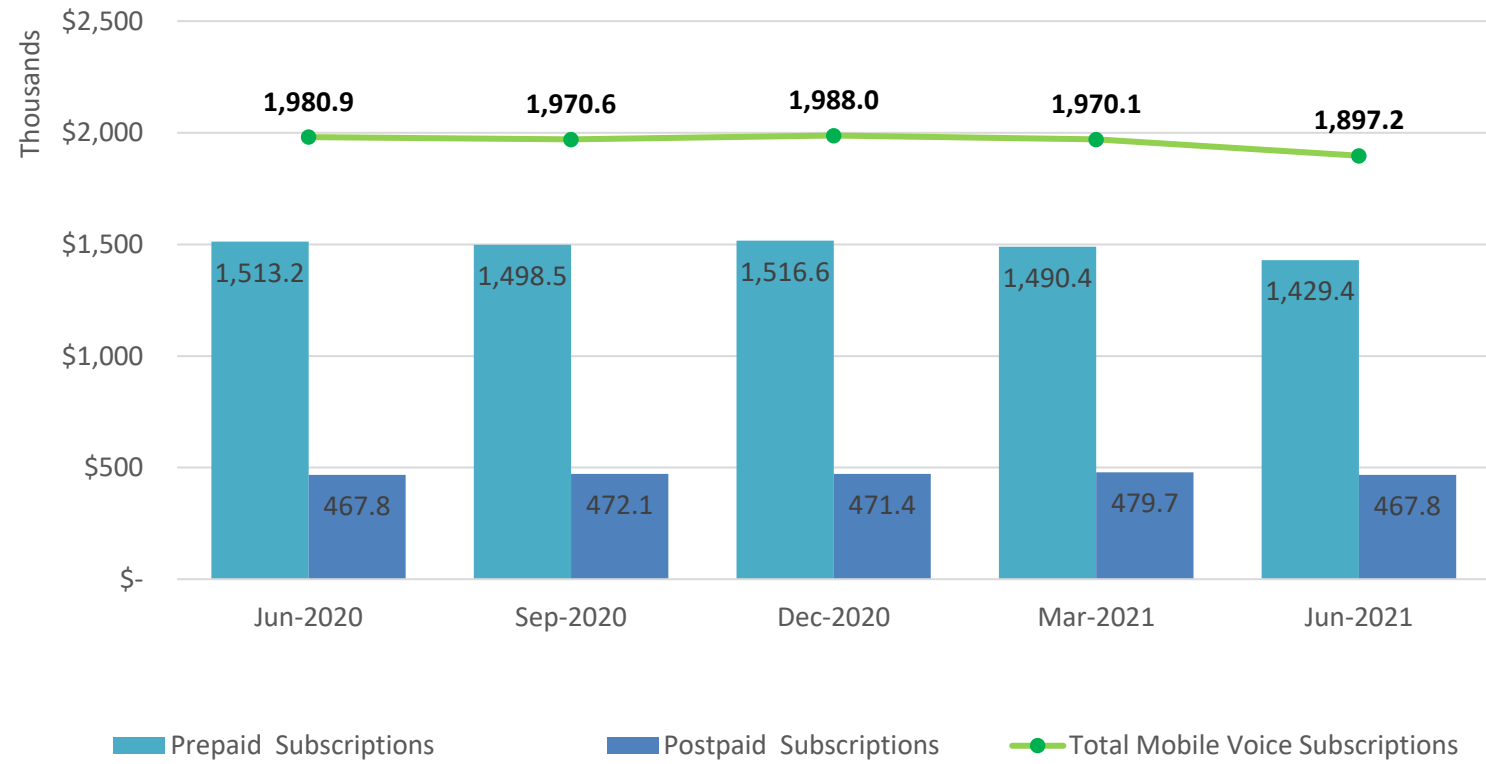
-4.2%



Q-o-Q PERCENT CHANGE

-3.7%

Number of Mobile Voice Subscriptions from Q2 2020 to Q2 2021



# Mobile Voice Penetration



**MOBILE VOICE  
PENETRATION  
PER 100  
INHABITANTS**

**139**



**Y-o-Y  
PERCENT  
CHANGE**

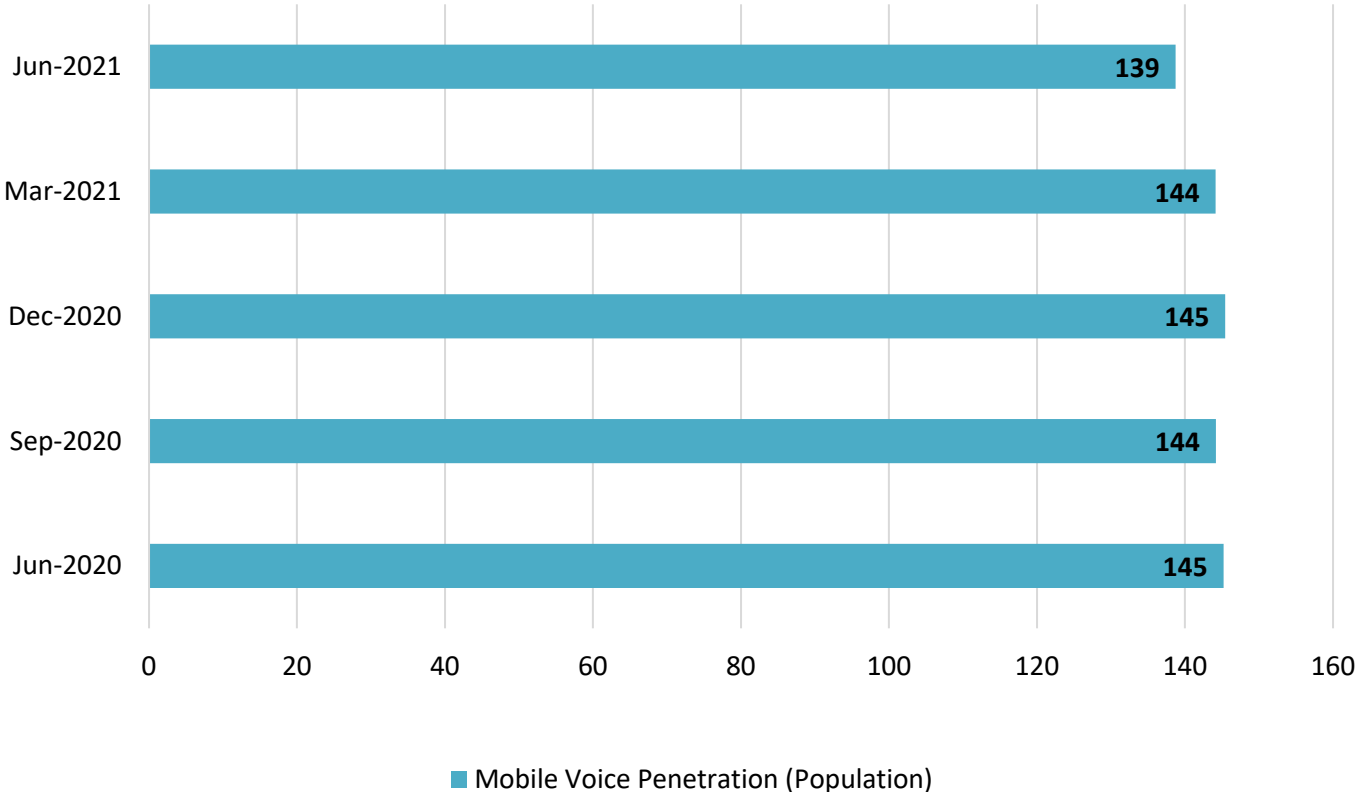
**-4.5%**



**Q-o-Q  
PERCENT  
CHANGE**

**-3.8%**

Penetration of Mobile Voice Subscriptions  
from Q2 2020 to Q2 2021



# Mobile Services Revenues



**GROSS REVENUES**

**\$450.6m**



**Y-o-Y PERCENT CHANGE**

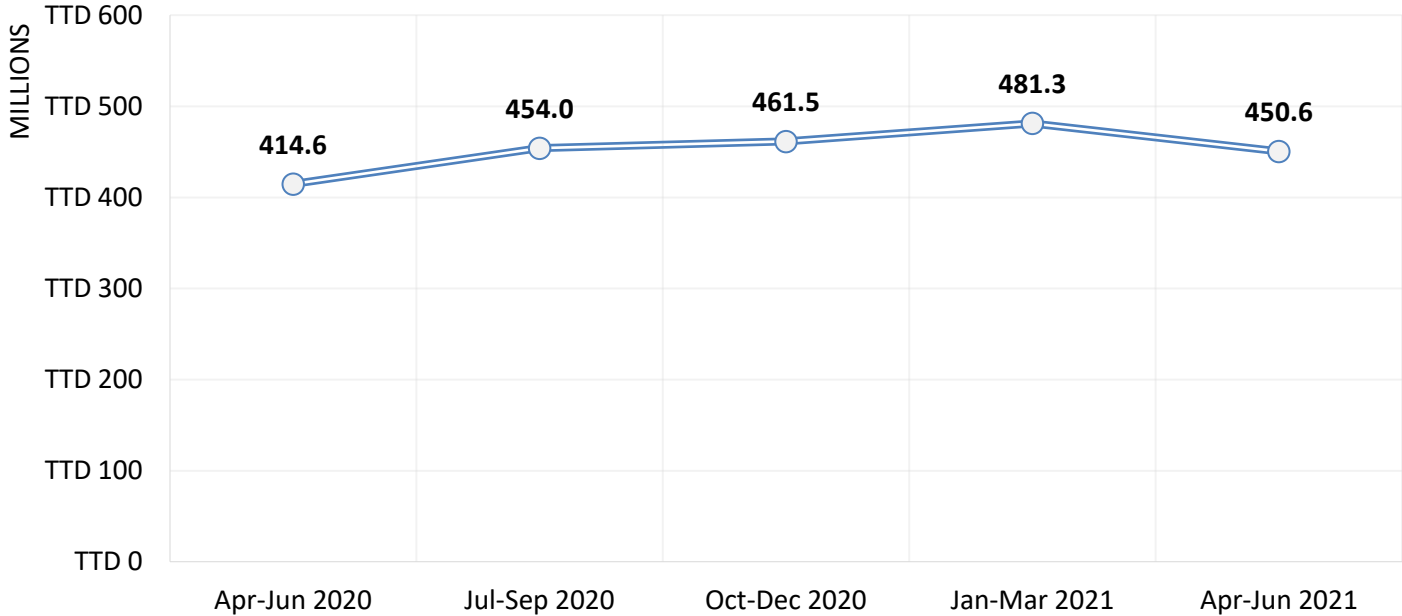
**8.7%**



**Q-o-Q PERCENT CHANGE**

**-6.4%**

**TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$)  
FROM Q2 2020 TO Q2 2021**



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

*Includes revenues from Mobile voice and Internet services.*

# Mobile Voice HHI



HHI

5,279



Y-o-Y  
PERCENT  
CHANGE

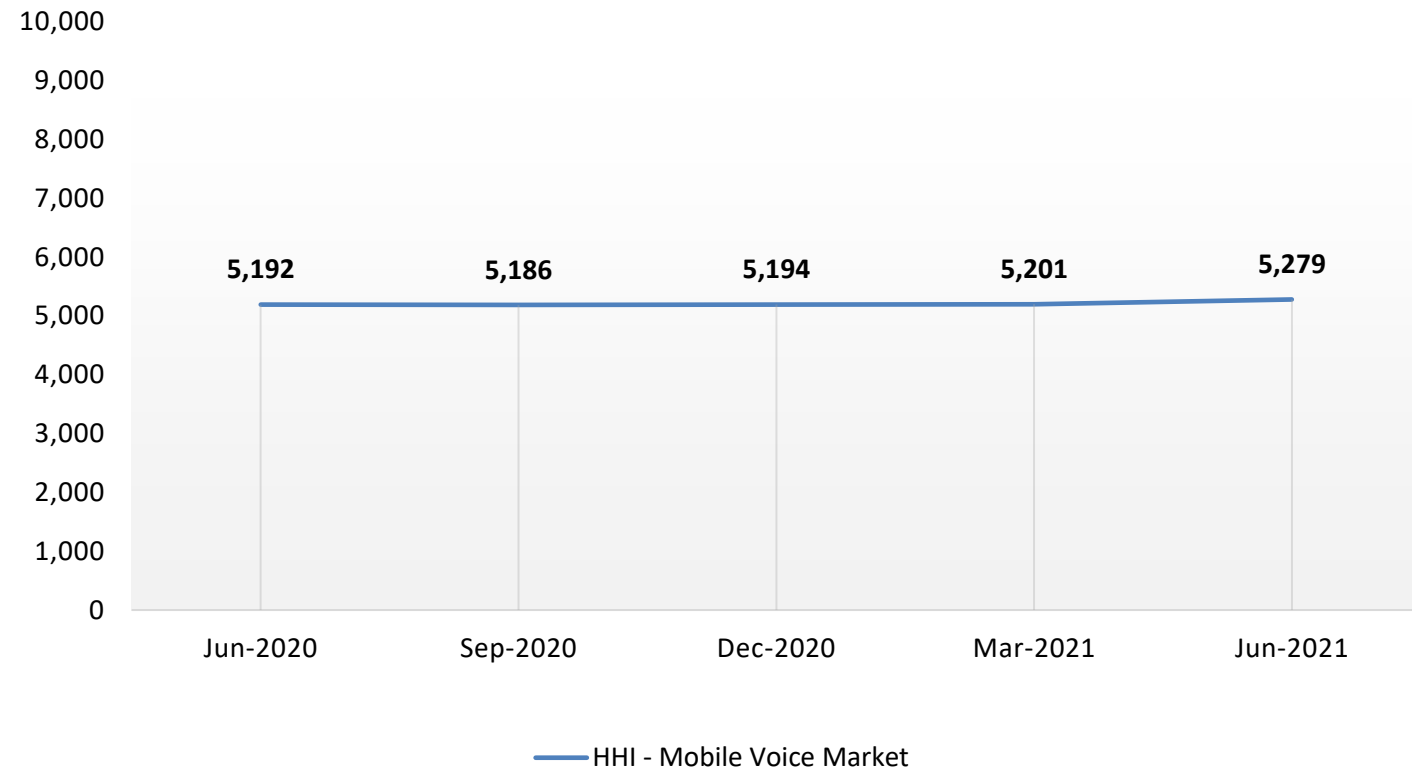
1.7%



Q-o-Q  
PERCENT  
CHANGE

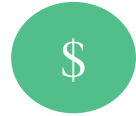
1.5%

HHI for Domestic Mobile Services  
from Q2 2020 to Q2 2021



# Average Revenue Per User

## Mobile Services



ARPU  
**\$236**



Y-o-Y  
PERCENT  
CHANGE

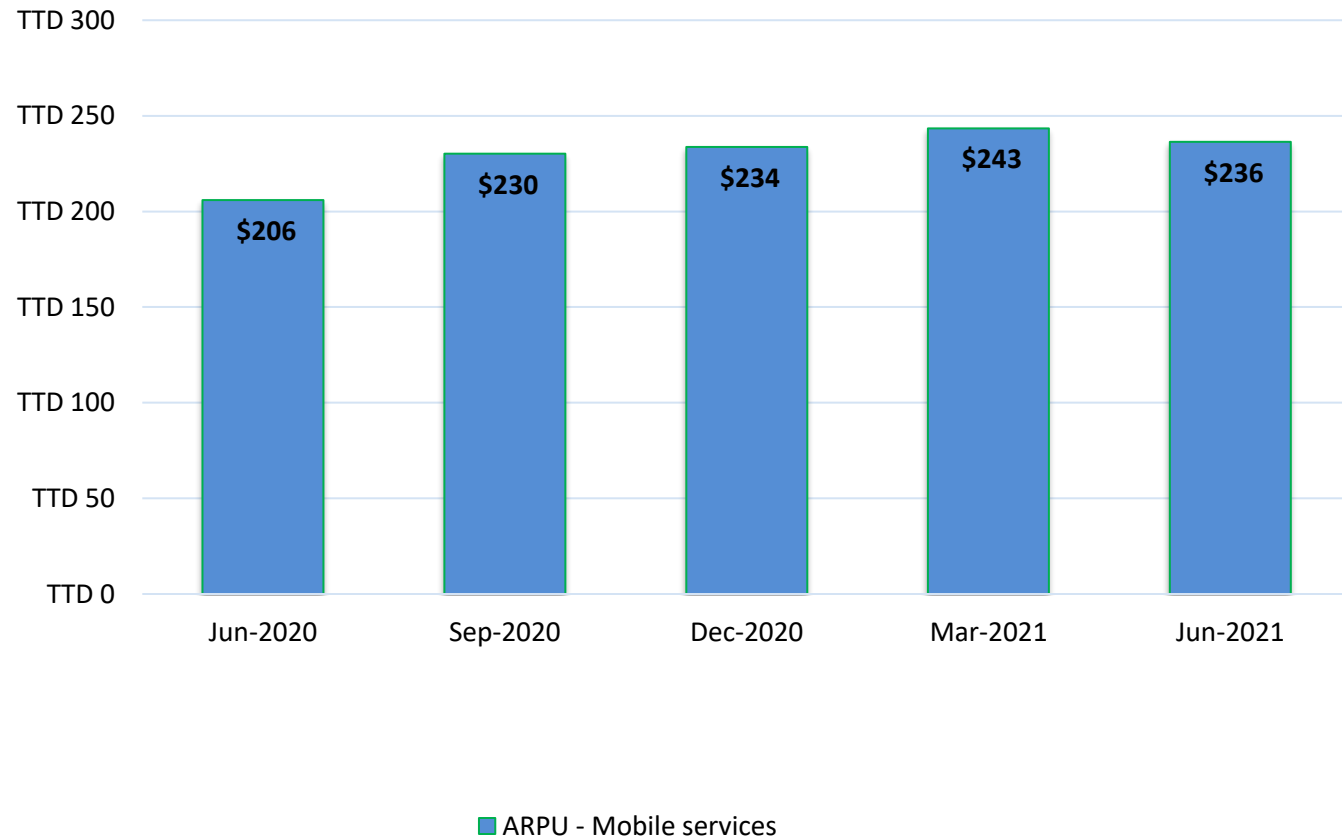
**14.9%**



Q-o-Q  
PERCENT  
CHANGE

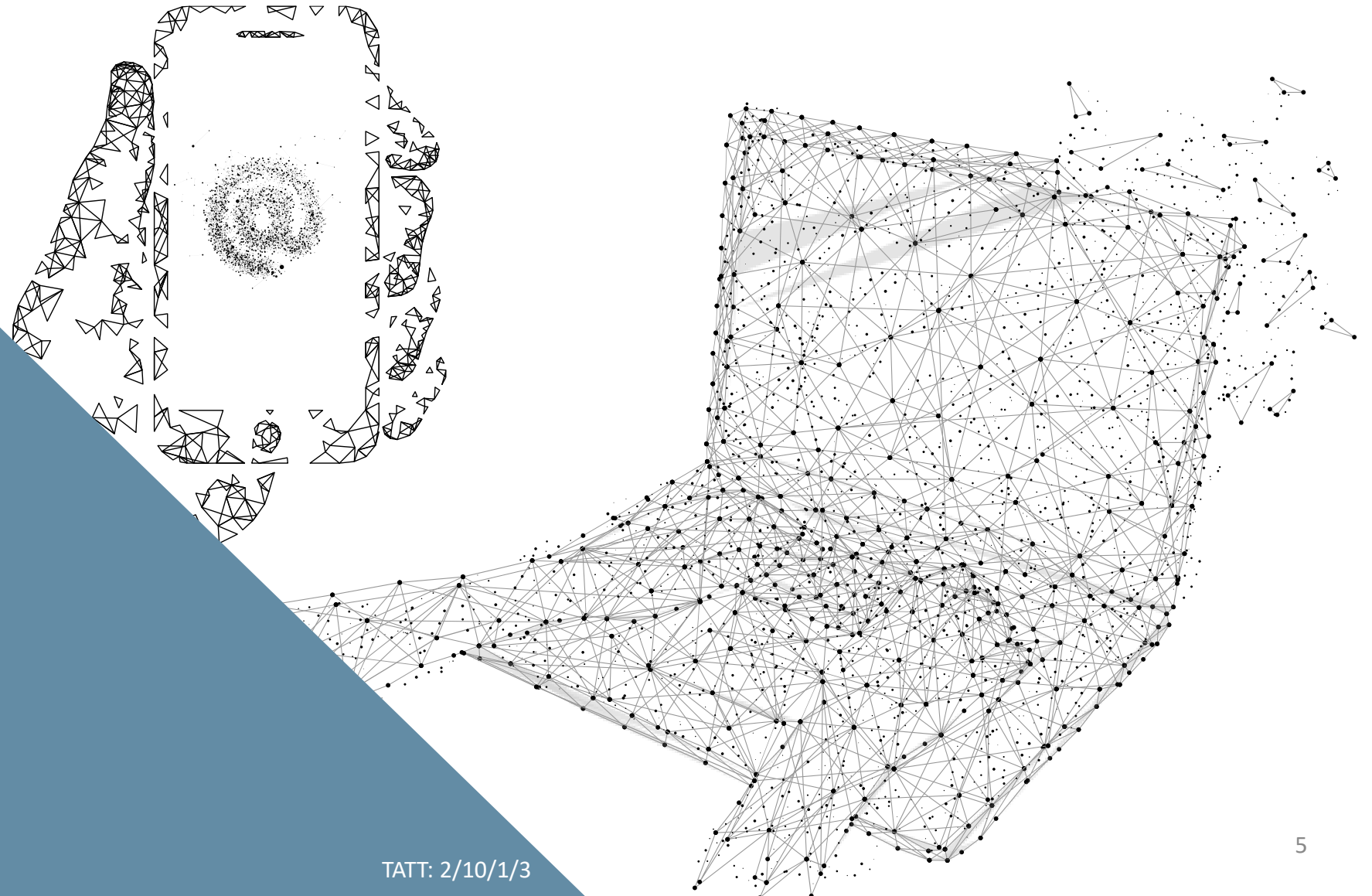
**-2.9%**

ARPU for Domestic Mobile Services  
from Q2 2020 to Q2 2021





# Internet



# Fixed Broadband Subscriptions



TOTAL NUMBER OF  
SUBSCRIPTIONS

**363,600**



Y-o-Y  
PERCENT  
CHANGE

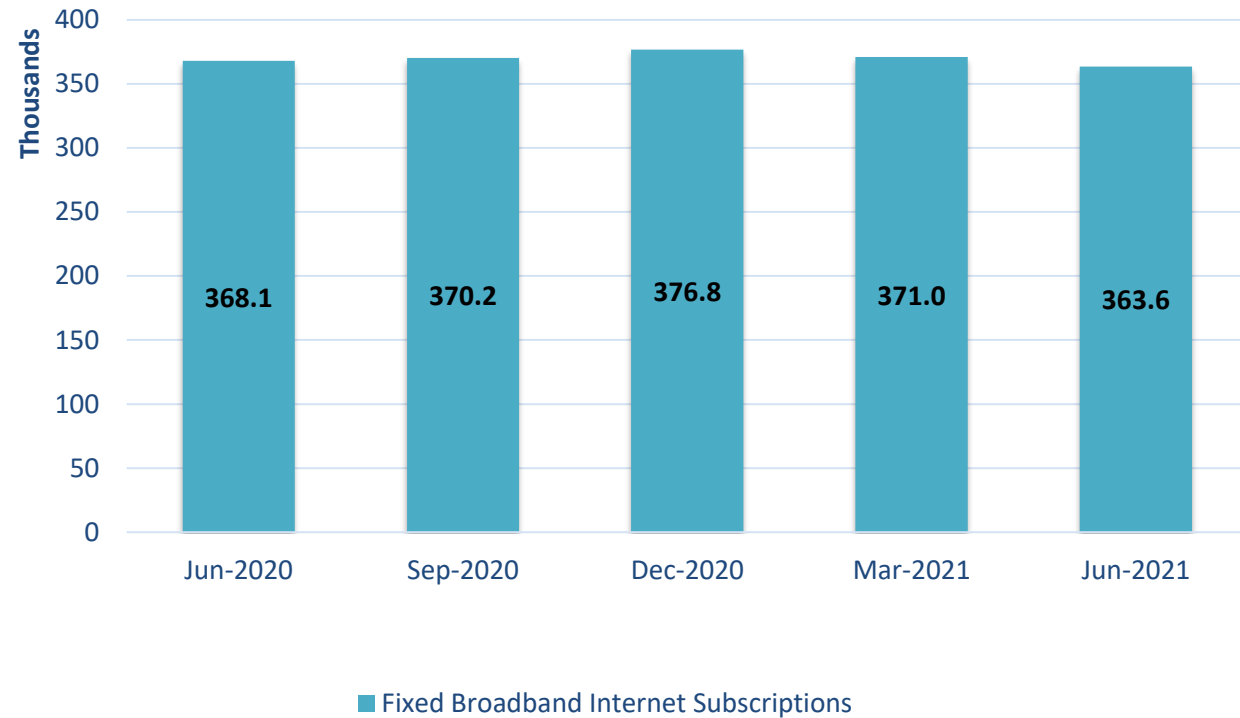
**-1.2%**



Q-o-Q  
PERCENT  
CHANGE

**-2%**

Number of Fixed Broadband Internet Subscriptions  
from Q2 2020 to Q2 2021



# Fixed Internet Penetration



**FIXED INTERNET  
PENETRATION  
PER 100  
INHABITANTS**

**26.6**



**Y-o-Y  
PERCENT  
CHANGE**

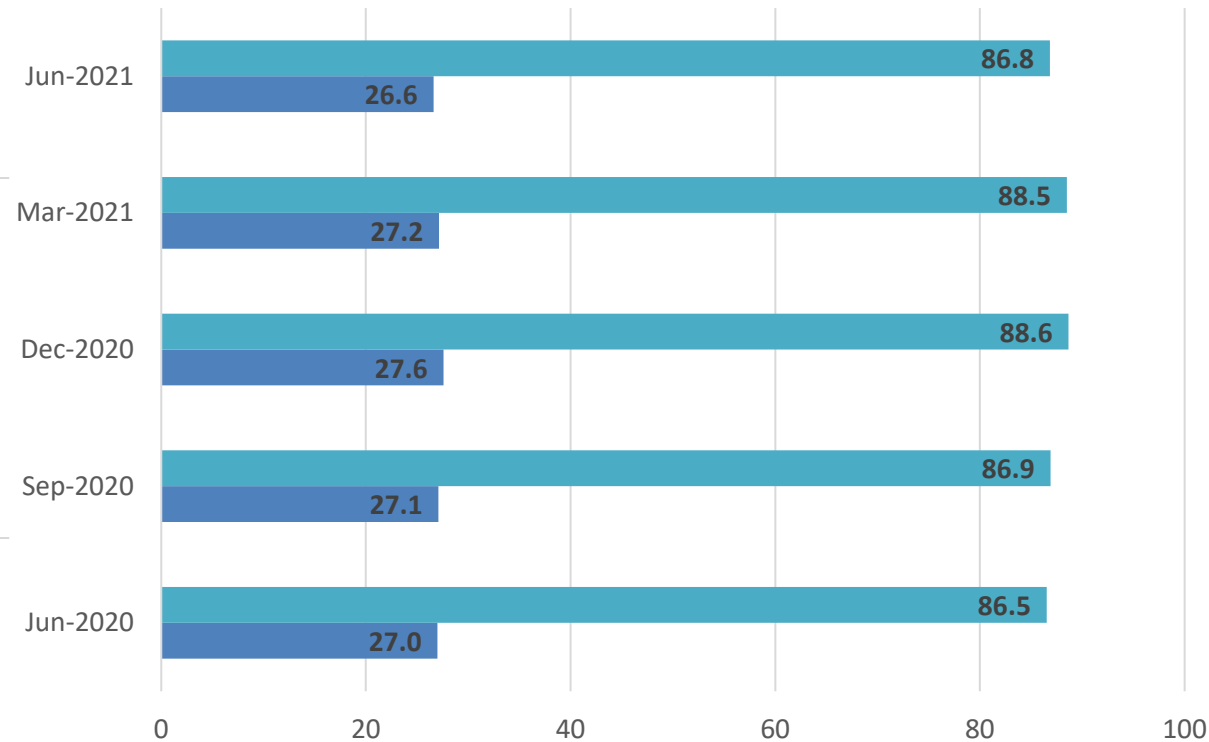
**-1.4%**



**Q-o-Q  
PERCENT  
CHANGE**

**-2%**

Penetration for Fixed Internet Subscriptions  
from Q2 2020 to Q2 2021



■ Fixed Internet Penetration (Household) ■ Fixed Internet Penetration (Population)



**FIXED INTERNET  
PENETRATION  
PER 100  
HOUSEHOLDS**

**86.8**



**Y-O-Y  
PERCENT  
CHANGE**

**0.4%**



**Q-O-Q  
PERCENT  
CHANGE**

**-1.9%**

# Mobile Internet Penetration



**MOBILE INTERNET  
PENETRATION PER  
100 INHABITANTS**

**56**



**Y-o-Y  
PERCENT  
CHANGE**

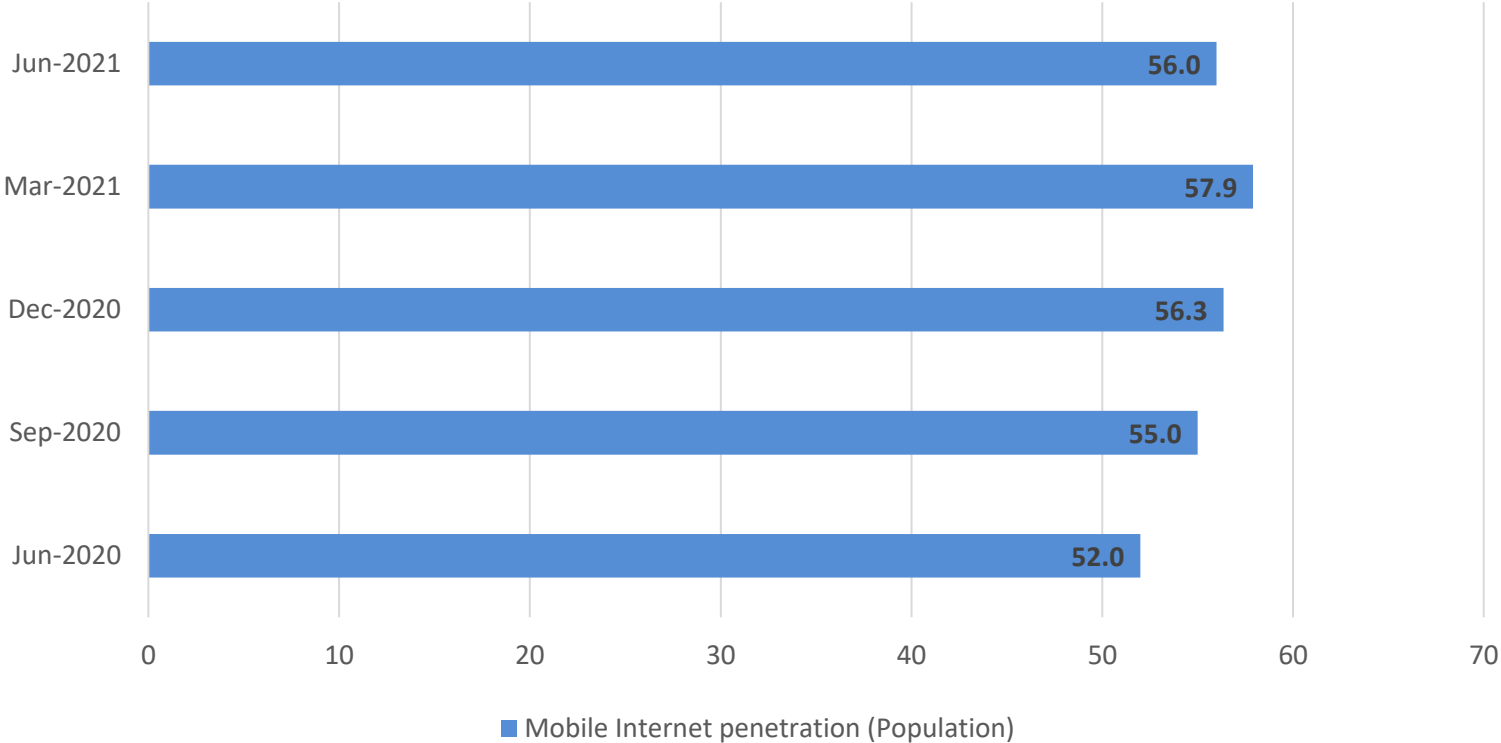
**7.7 %**



**Q-o-Q  
PERCENT  
CHANGE**

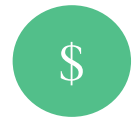
**-3.3%**

Penetration for Mobile Internet Subscriptions  
from Q2 2020 to Q2 2021



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

# Fixed Internet Revenues



**GROSS REVENUES**  
**\$319.5m**



**Y-o-Y PERCENT CHANGE**

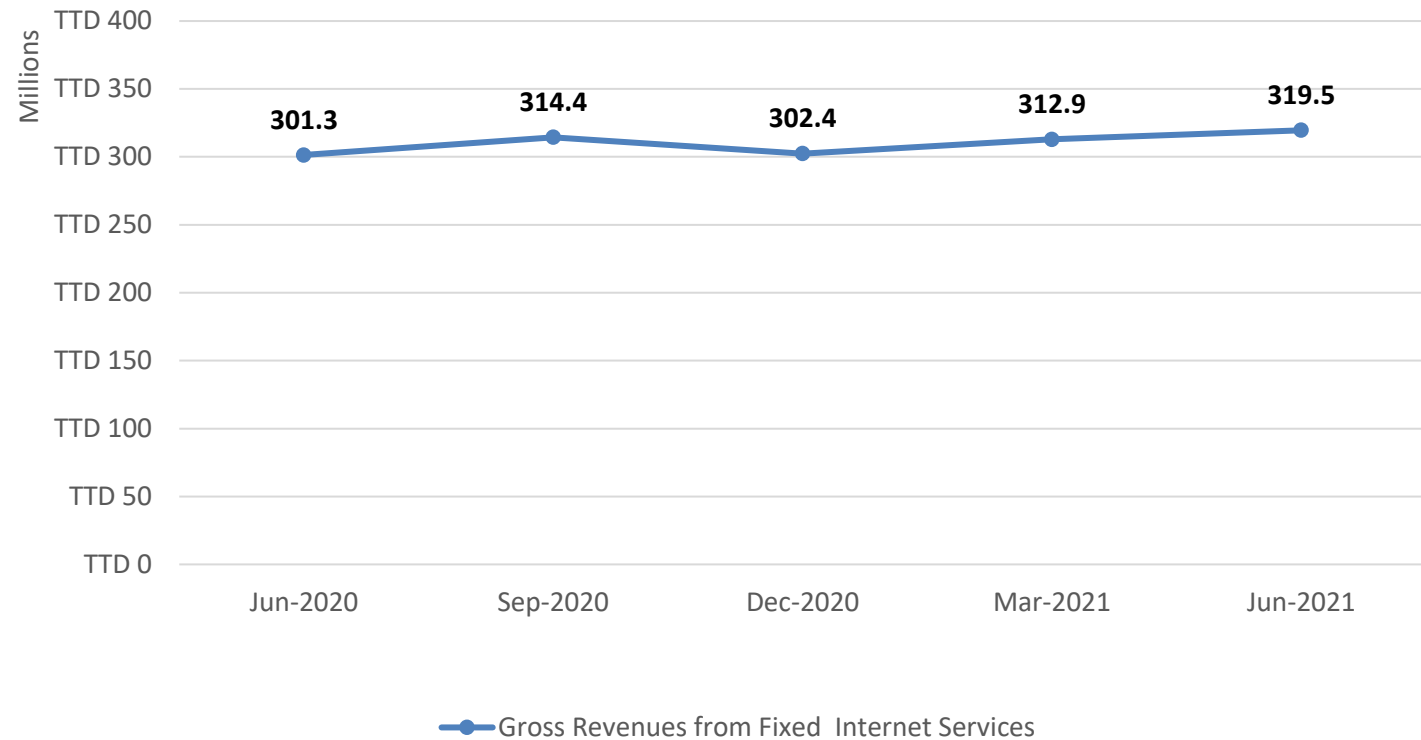
**6%**



**Q-o-Q PERCENT CHANGE**

**2.1%**

Gross Revenues from Fixed Internet Services  
from Q2 2020 to Q2 2021



# Fixed Internet HHI



HHI  
**2,909**

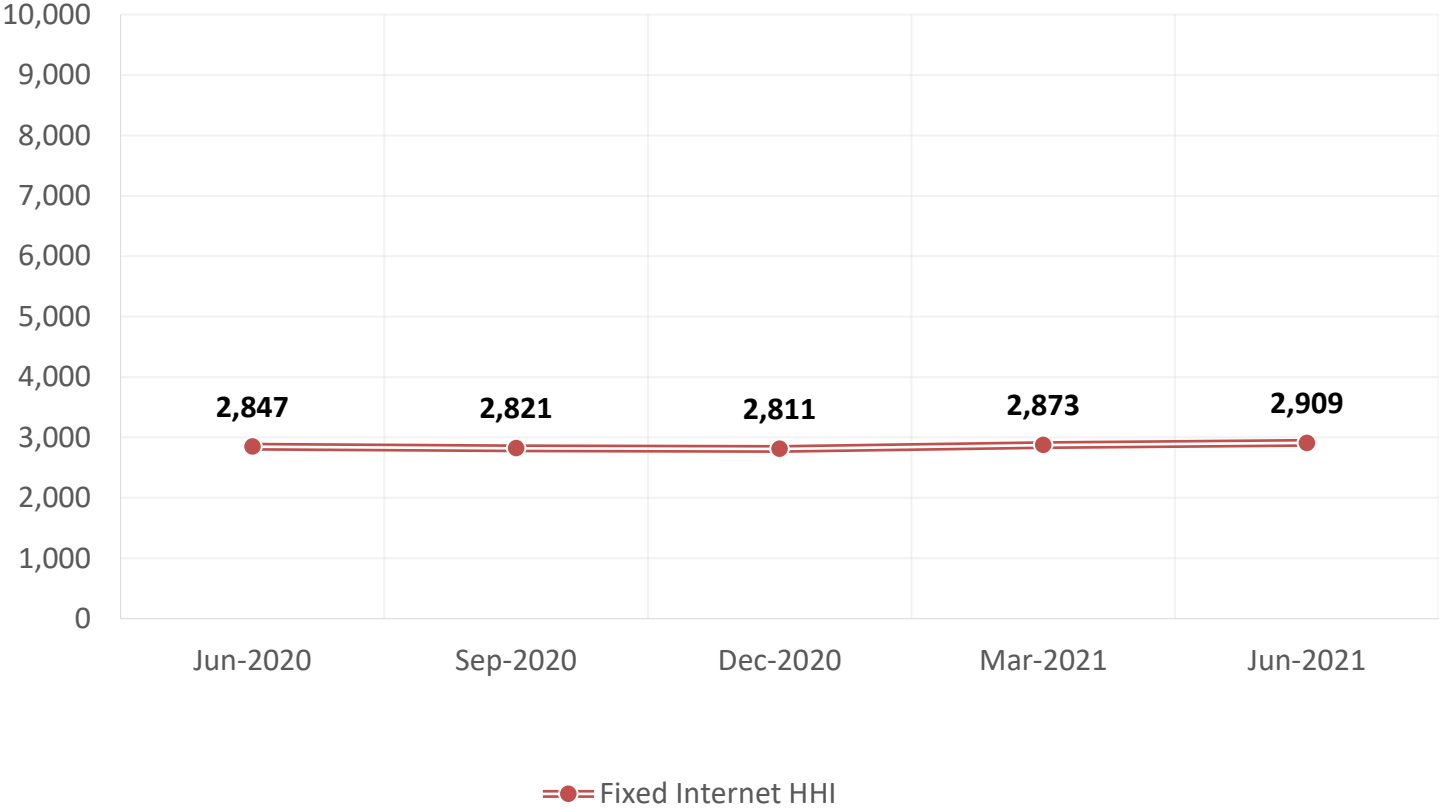


Y-o-Y  
PERCENT  
CHANGE  
**2.2%**



Q-o-Q  
PERCENT  
CHANGE  
**1.3%**

HHI FOR FIXED INTERNET SERVICES  
FROM Q2 2020 TO Q2 2021



# Fixed Internet Average Revenue Per User



ARPU  
**\$879**

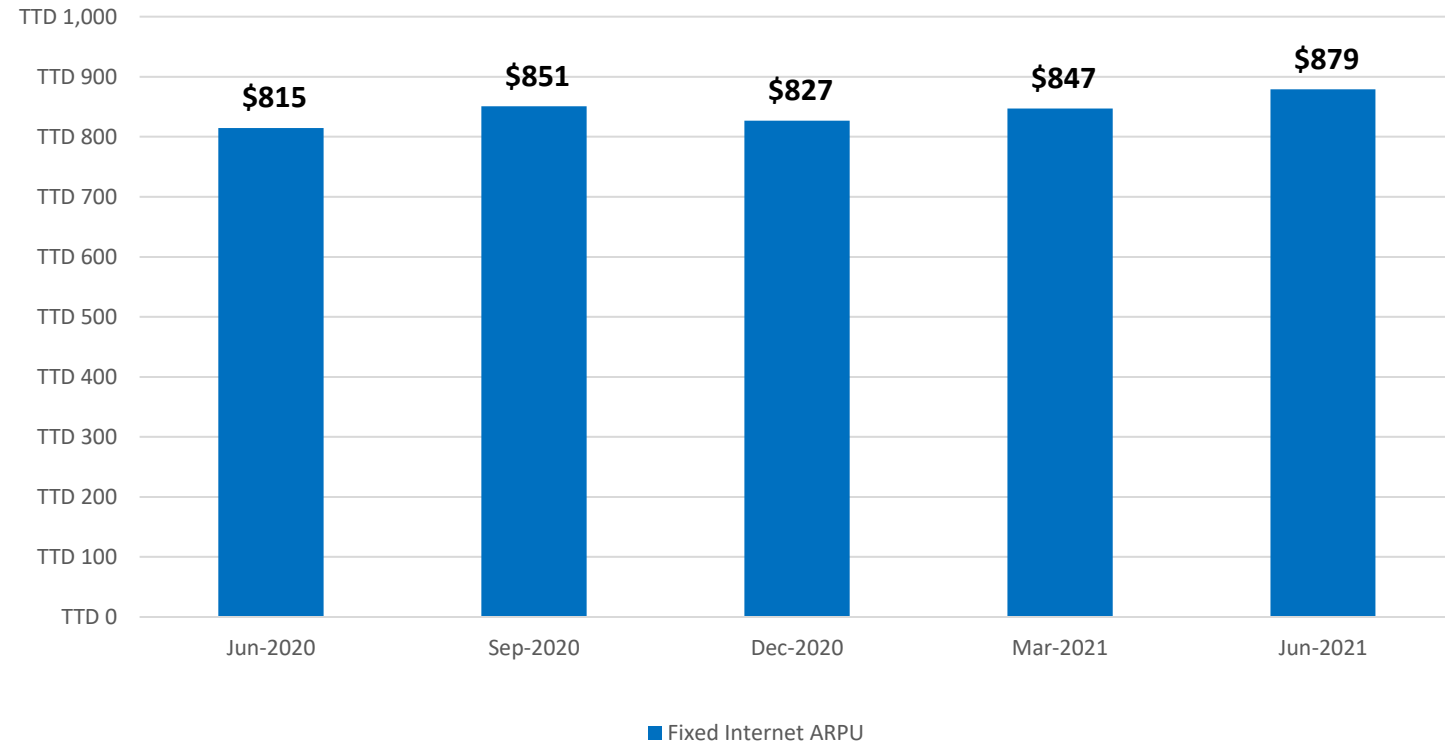


Y-o-Y  
PERCENT  
CHANGE  
**7.9%**



Q-o-Q  
PERCENT  
CHANGE  
**3.8%**

ARPU for Fixed Internet Services  
from Q2 2020 to Q2 2021



# Pay TV





# Pay TV Subscriptions



TOTAL NUMBER  
OF  
SUBSCRIPTIONS

**238,000**



Y-o-Y  
PERCENT  
CHANGE

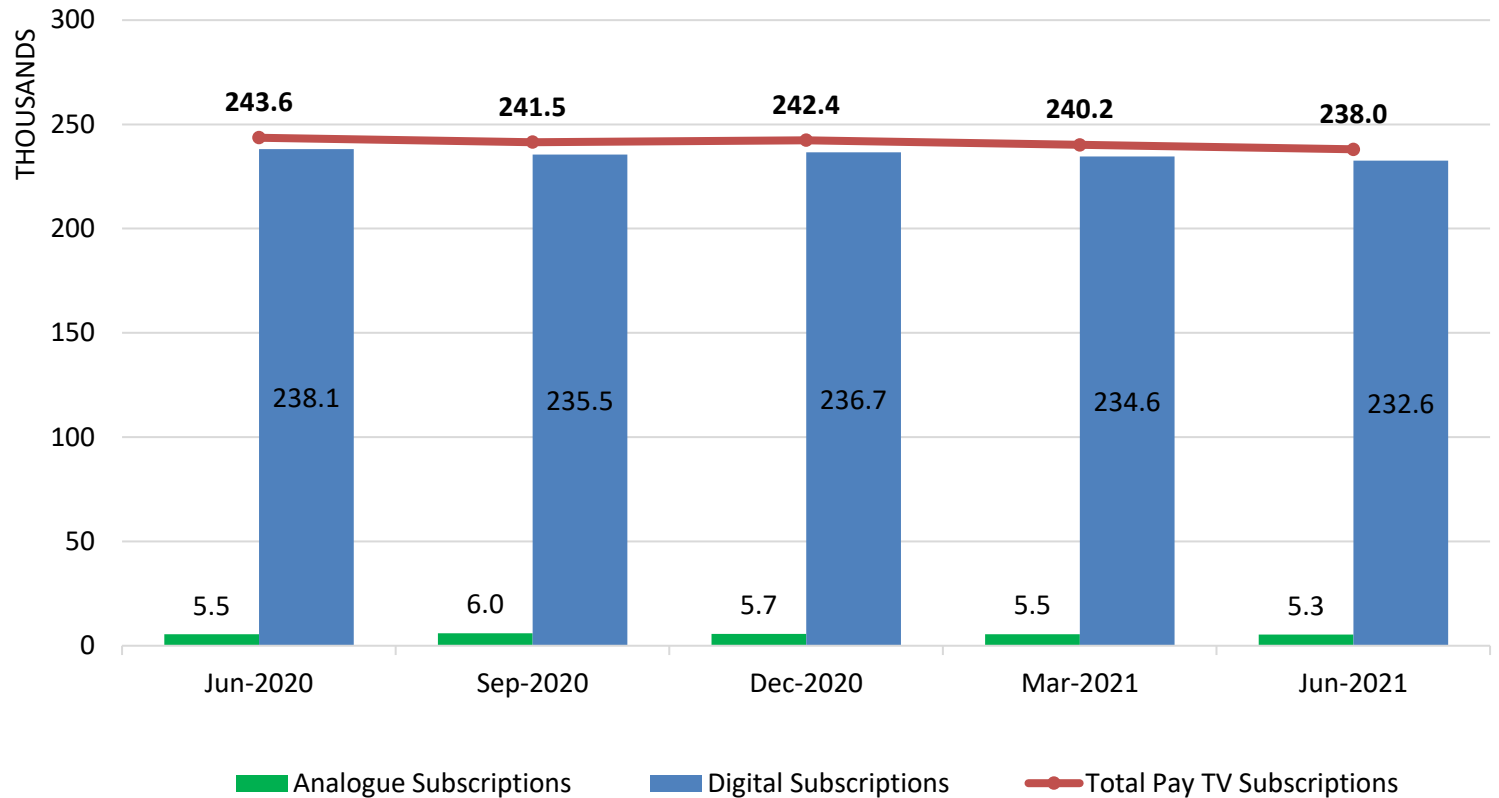
**-2.3%**



Q-o-Q  
PERCENT  
CHANGE

**-0.9%**

Number of Pay TV Subscriptions  
from Q2 2020 to Q2 2021



# Pay TV Penetration



**PAY TV  
PENETRATION  
PER 100  
INHABITANTS**

**17.2**



**Y-o-Y  
PERCENT  
CHANGE**

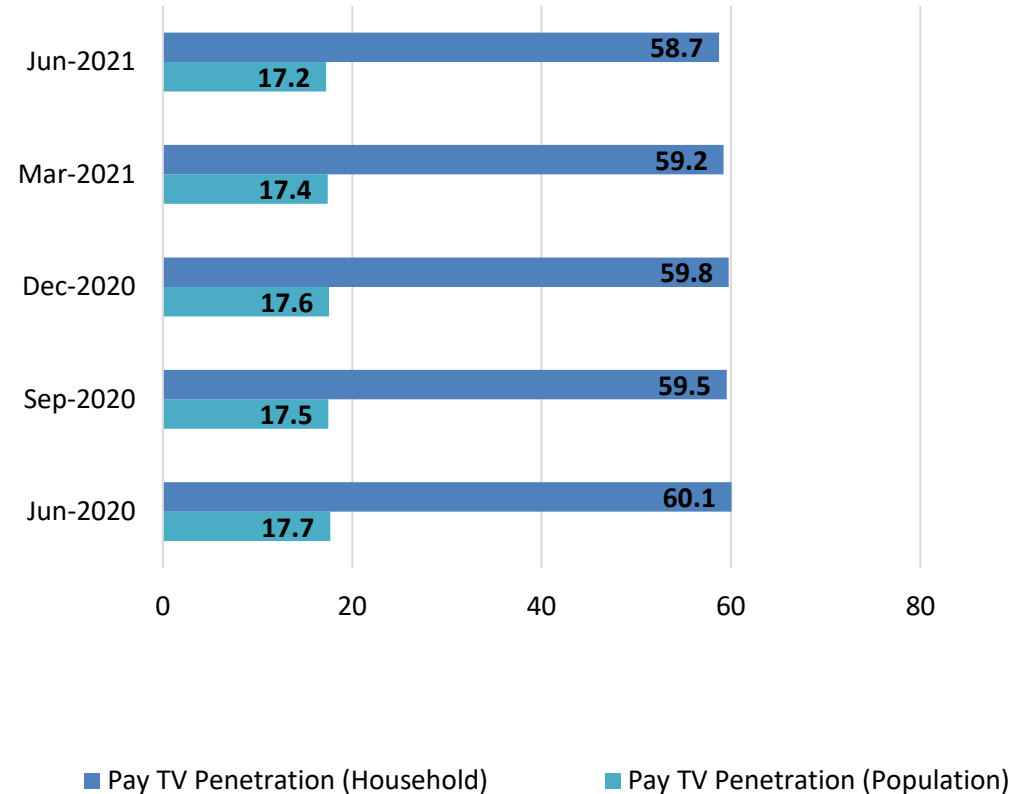
**-2.5%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.9%**

Penetration Rates of Pay TV Services  
from Q2 2020 to Q2 2021



**PAY TV  
PENETRATION  
PER 100  
HOUSEHOLDS**

**58.7**



**Y-O-Y  
PERCENT  
CHANGE**

**-2.2%**



**Q-O-Q  
PERCENT  
CHANGE**

**-0.8%**

# Pay TV Revenues



**GROSS  
REVENUES**

**\$156.7m**



**Y-o-Y  
PERCENT  
CHANGE**

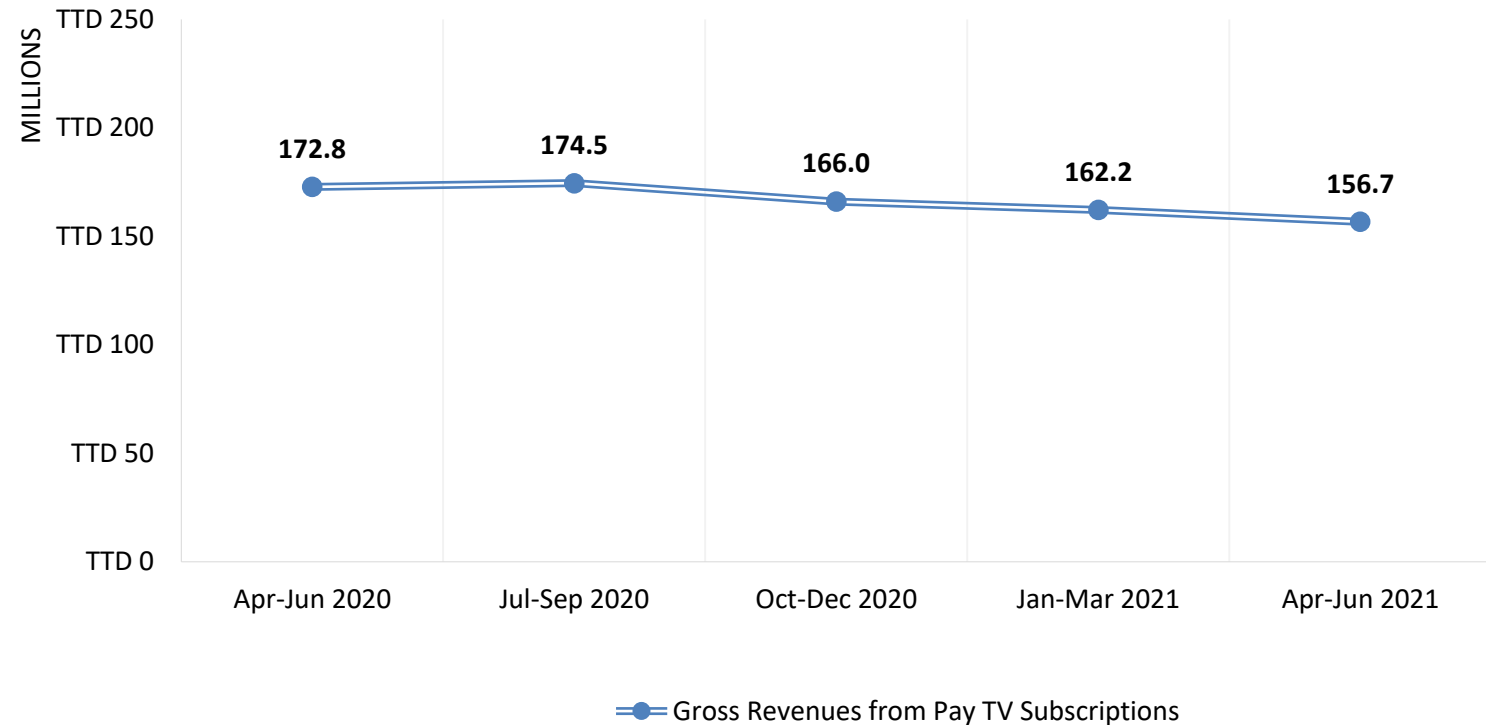
**-9.3%**



**Q-o-Q  
PERCENT  
CHANGE**

**-3.4%**

GROSS REVENUES FROM PAY TV SERVICES  
FROM Q2 2020 TO Q2 2021



# Pay TV HHI

HHI for Pay TV Services  
from Q2 2020 to Q2 2021



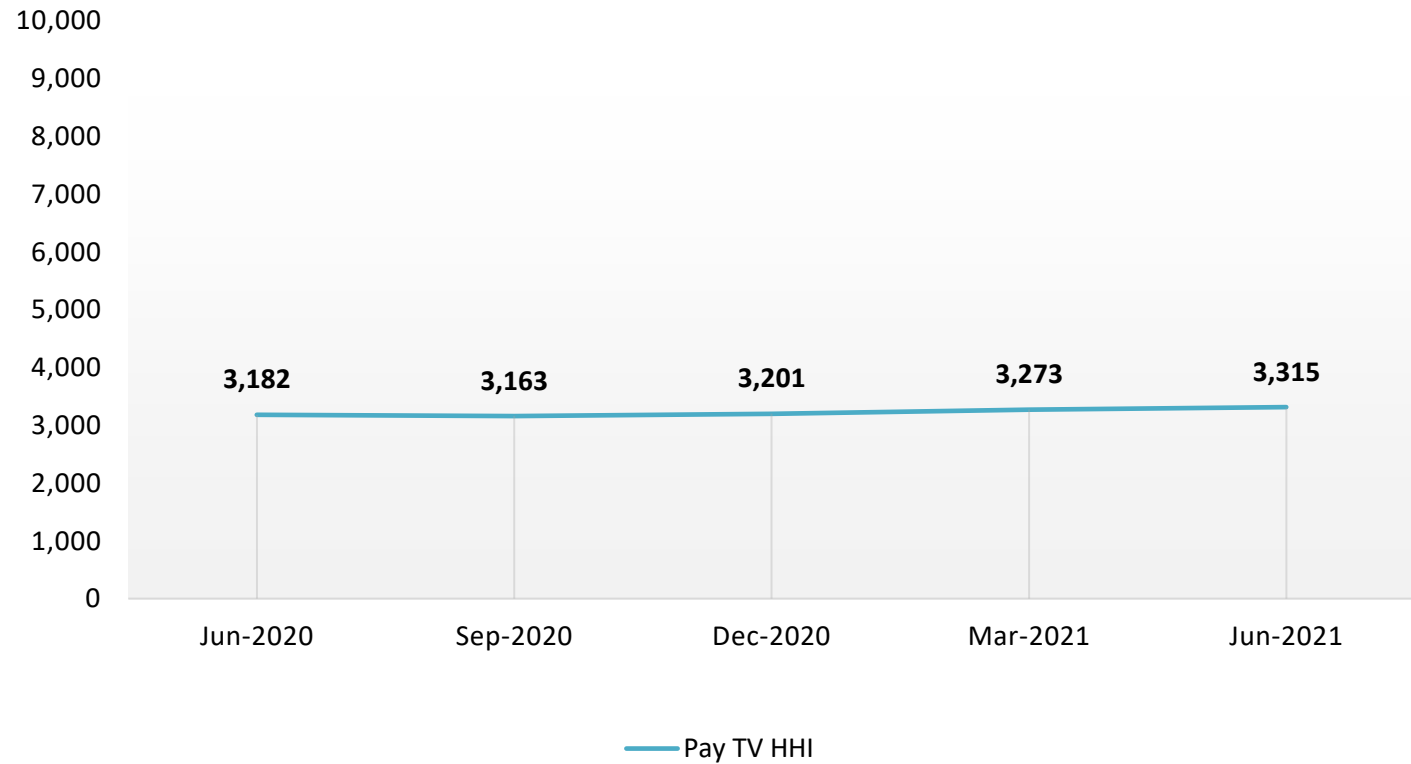
HHI  
**3,315**



Y-o-Y  
PERCENT  
CHANGE  
**4.2%**



Q-o-Q  
PERCENT  
CHANGE  
**1.3%**



# Pay TV

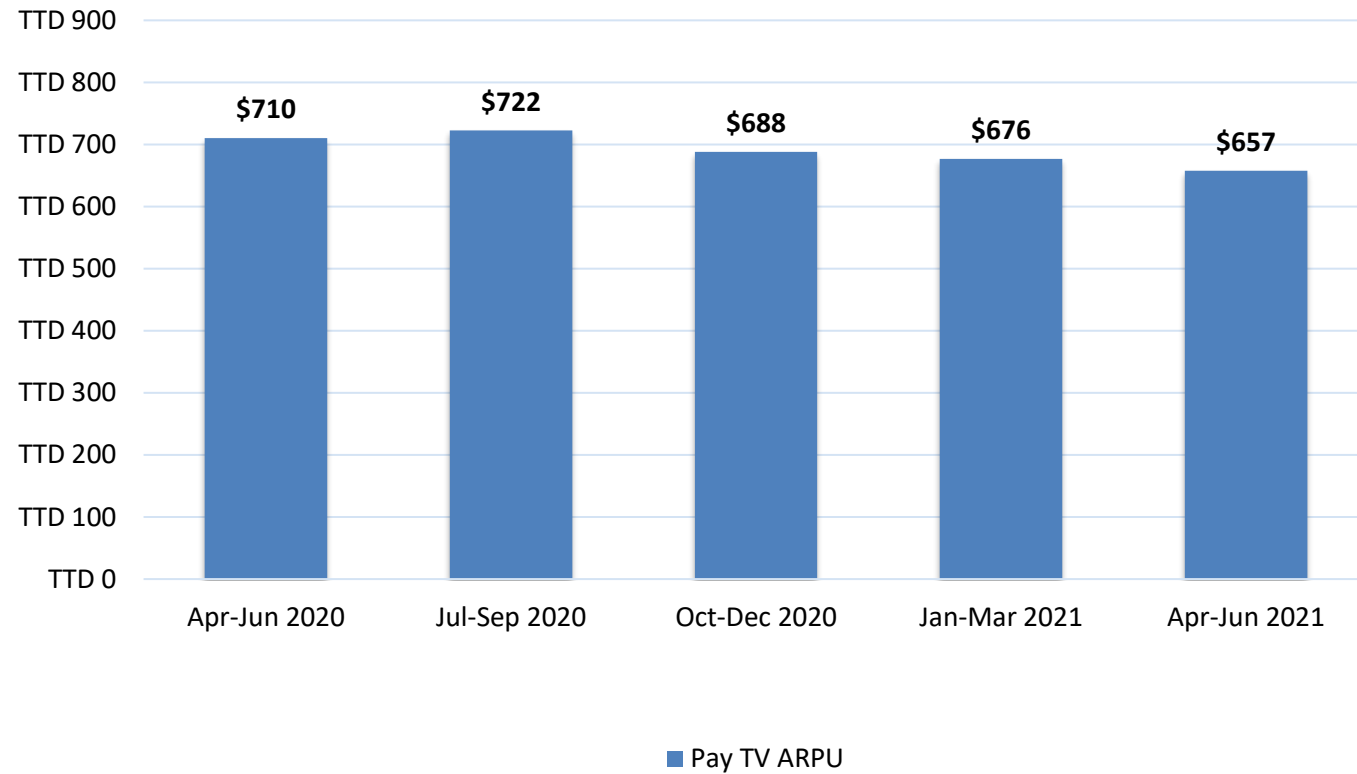
## Average Revenue Per User

ARPU  
\$ **\$657**

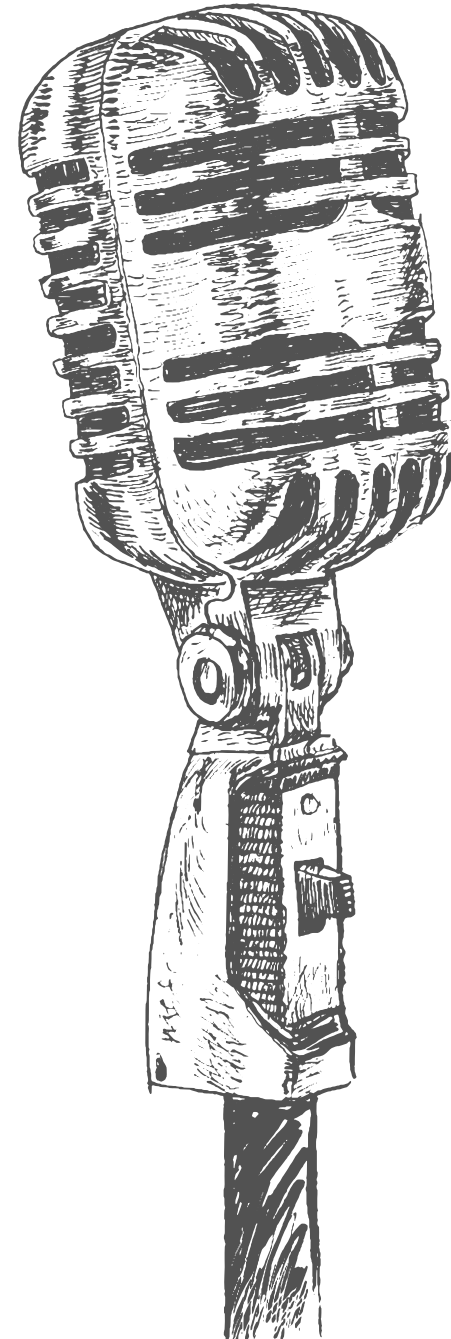
Y-o-Y  
PERCENT  
CHANGE  
**-7.4%**

Q-o-Q  
PERCENT  
CHANGE  
**-2.8%**

ARPU for Pay TV Services  
from Q2 2020 to Q2 2021



# Free-to-Air Radio



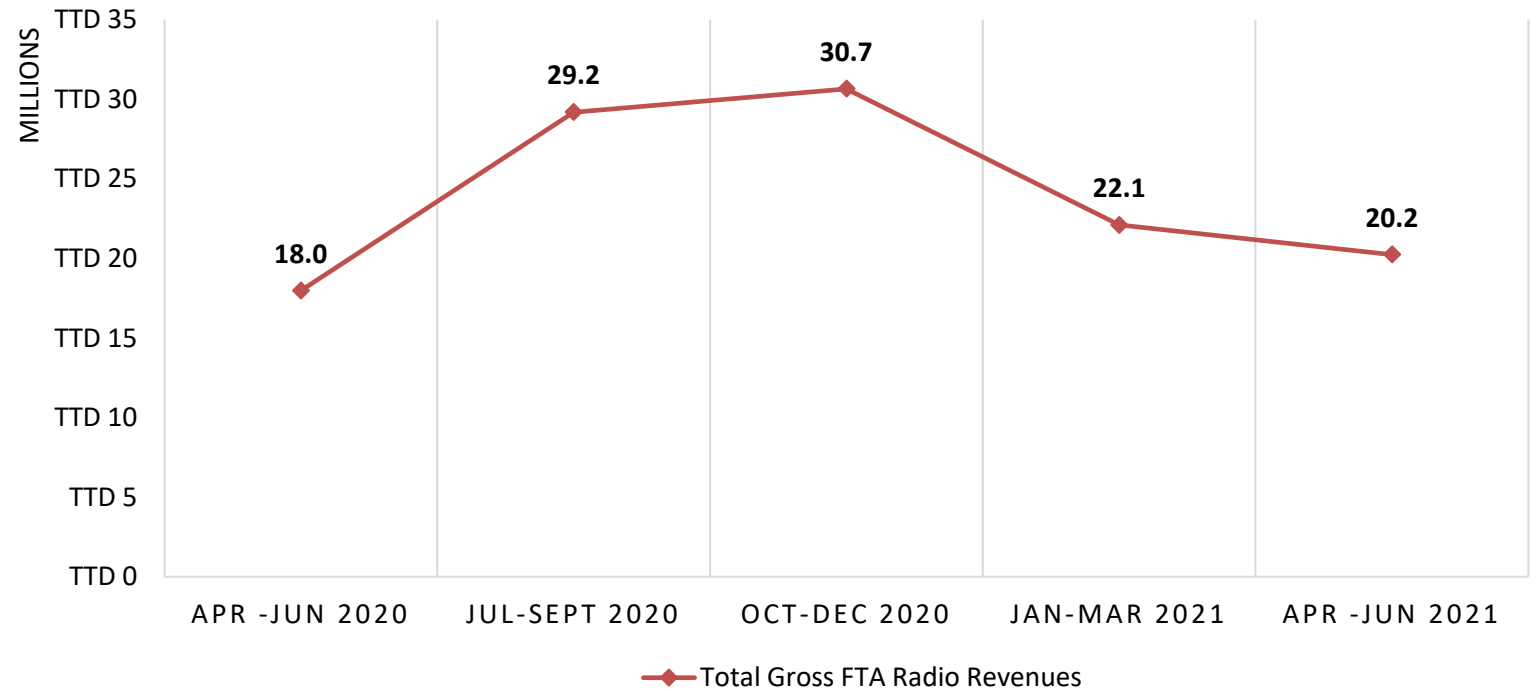
# Free-to-Air Radio Revenues

\$ **GROSS REVENUES**  
\$20.2m

↑ **Y-o-Y PERCENT CHANGE**  
12.6%

↓ **Q-o-Q PERCENT CHANGE**  
-8.4%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q2 2020 TO Q2 2021



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

# Free-to-Air Radio HHI



HHI  
**482**

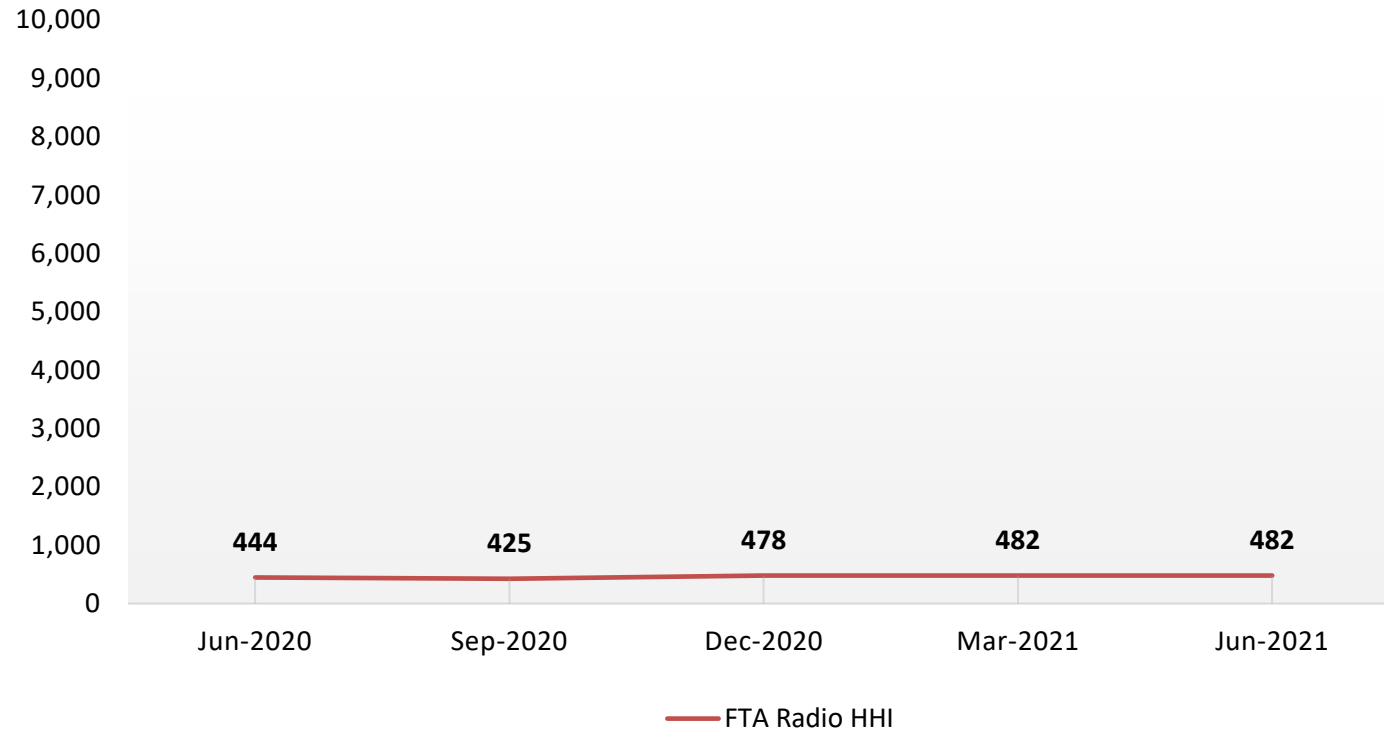


Y-o-Y  
PERCENT  
CHANGE  
**8.5%**



Q-o-Q  
PERCENT  
CHANGE  
**0%**

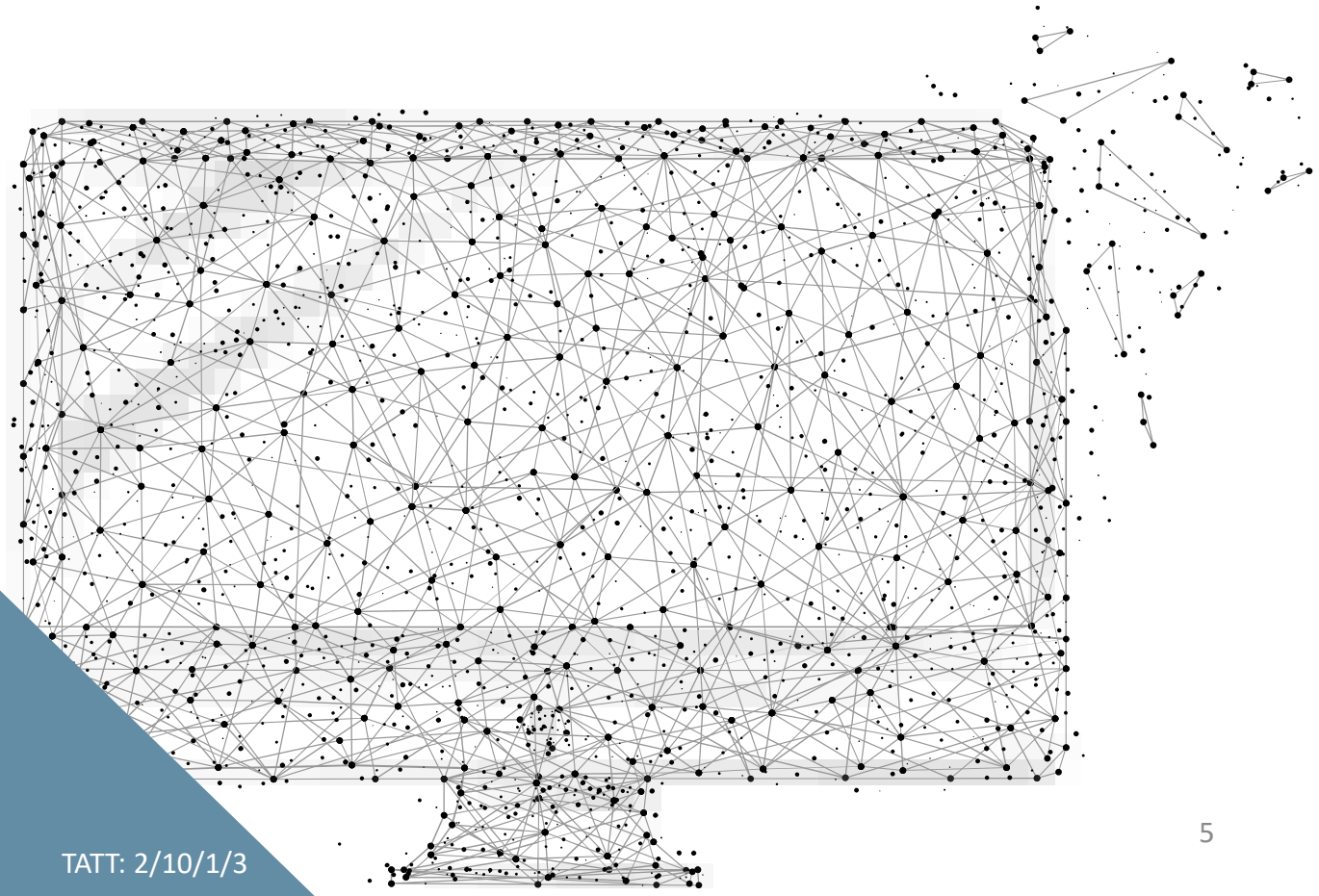
HHI for Free to Air Radio Services  
from Q2 2020 to Q2 2021



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



# Free-to-Air TV



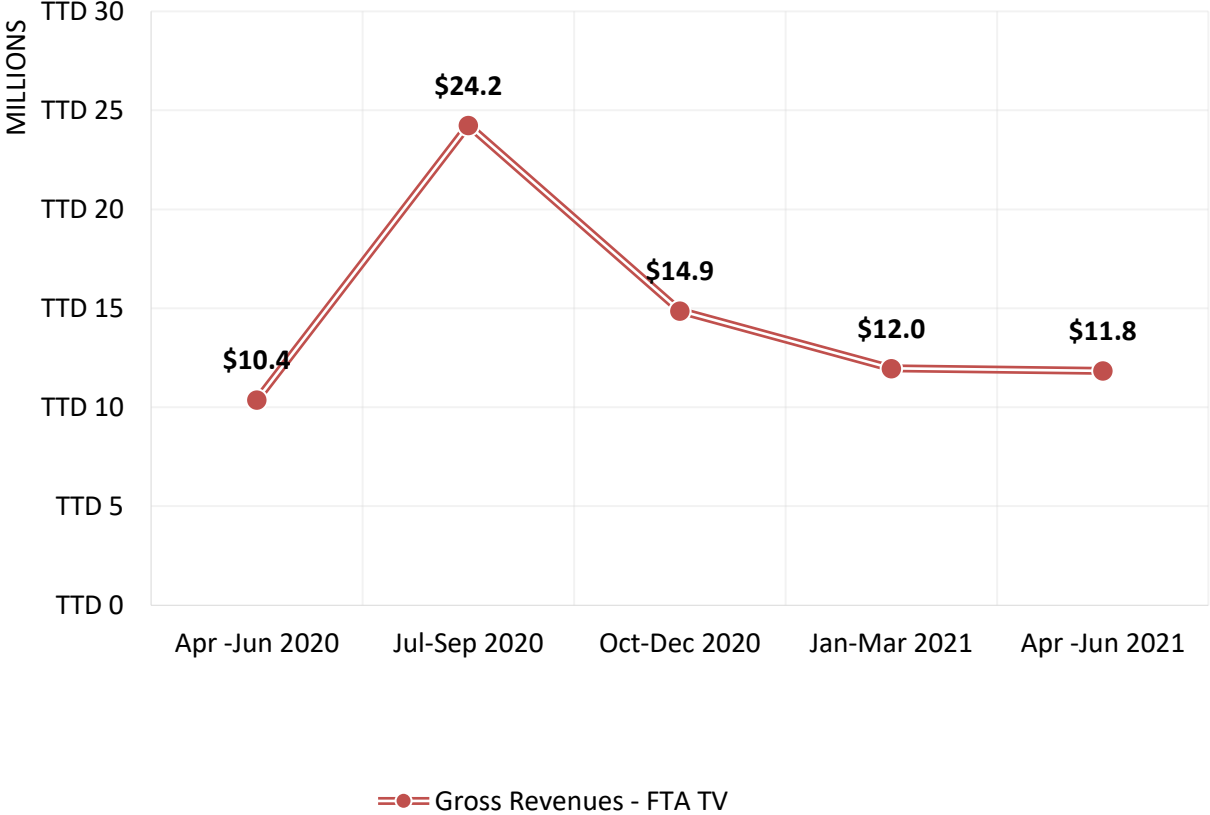
# Free-to-Air TV Revenues

**\$**  
**GROSS REVENUES**  
**\$11.8m**

**Y-o-Y PERCENT CHANGE**  
**14.2%**

**Q-o-Q PERCENT CHANGE**  
**-1%**

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q2 2020 TO Q2 2021



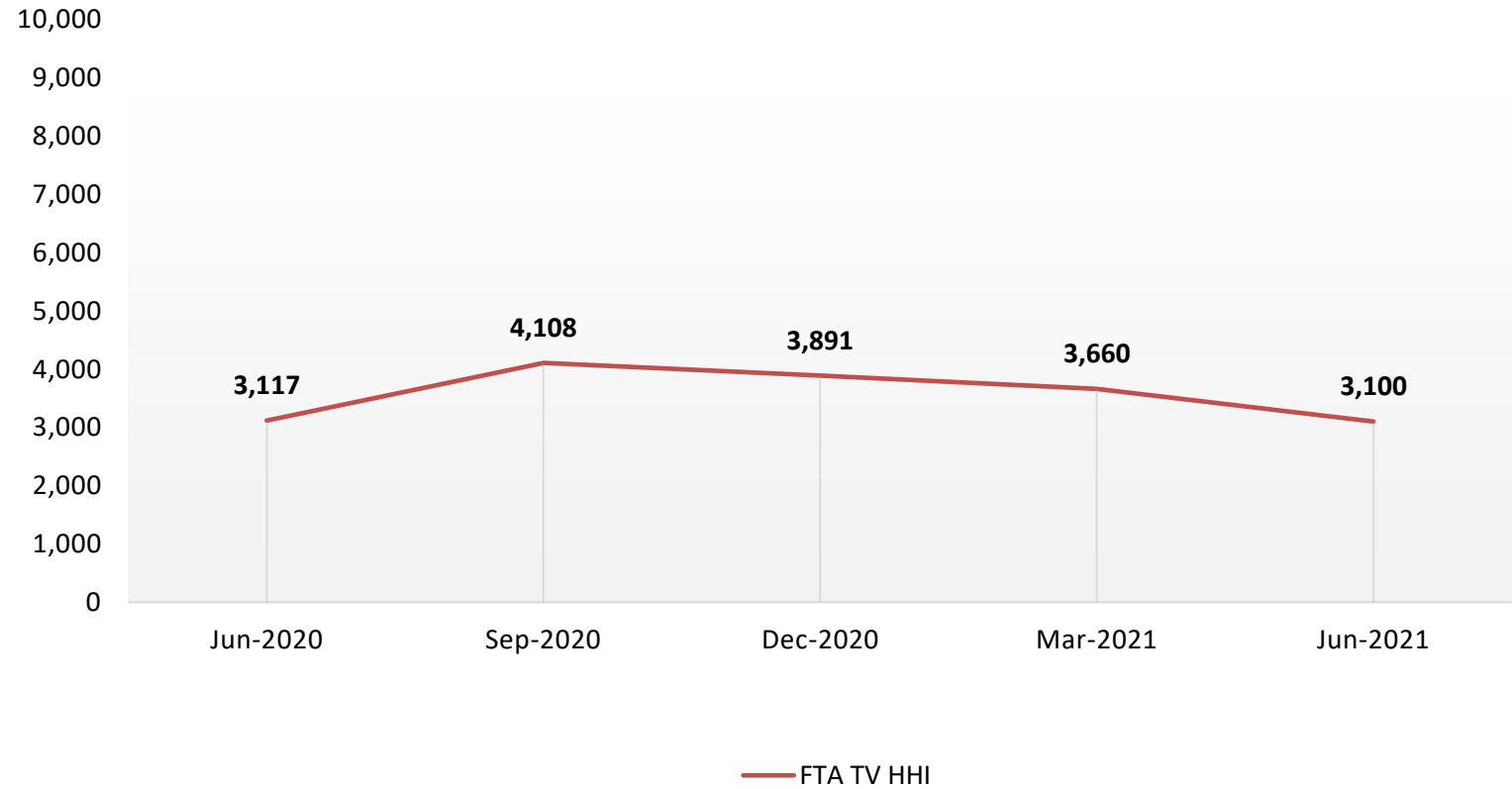
# Free-to-Air TV HHI

HHI  
**3,100**

Y-o-Y  
PERCENT  
CHANGE  
**-0.5%**

Q-o-Q  
PERCENT  
CHANGE  
**-15.3%**

HHI for Free to Air TV Services  
from Q2 2020 to Q2 2021



# QUARTERLY MARKET UPDATE

April to June 2021

