

# QUARTERLY MARKET UPDATE

October to December 2021



## Quarterly Market Update – Q4 2021

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](mailto:policy@tatt.org.tt)

© April 2022

### **Legal Disclaimer**

The information and statistics contained in this document were obtained from various sources available to the Telecommunications Authority of Trinidad and Tobago at the time of publication. The Authority does not give any warranty as to the accuracy or reliability of the information and shall not be liable for any loss or damage howsoever caused arising out of any use or reliance upon any statements made or information contained in this document.

# 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

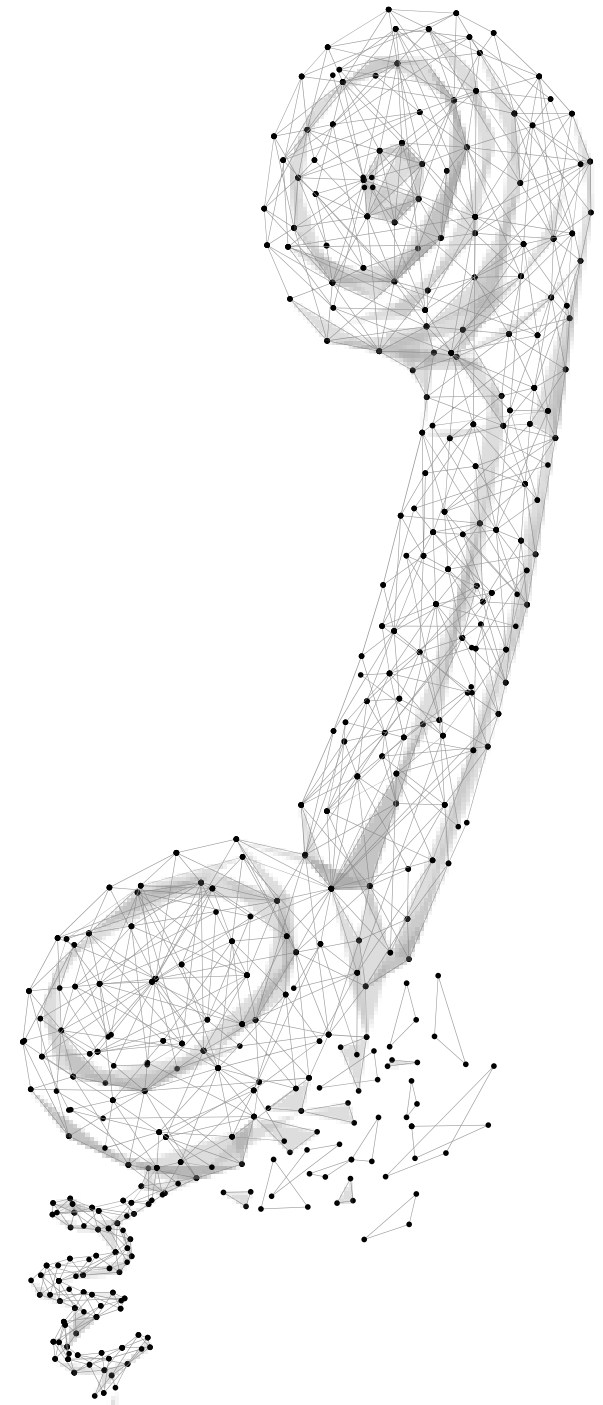
**Free-to-Air TV Market**

---

# Notes

- 1. Fixed Internet Market includes fixed wired and fixed wireless Internet.**
  
- 2. Penetration rates have been calculated using the following population figures:**
  - a) 1,367,558 (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**

**341,400**



**Y-o-Y PERCENT CHANGE**

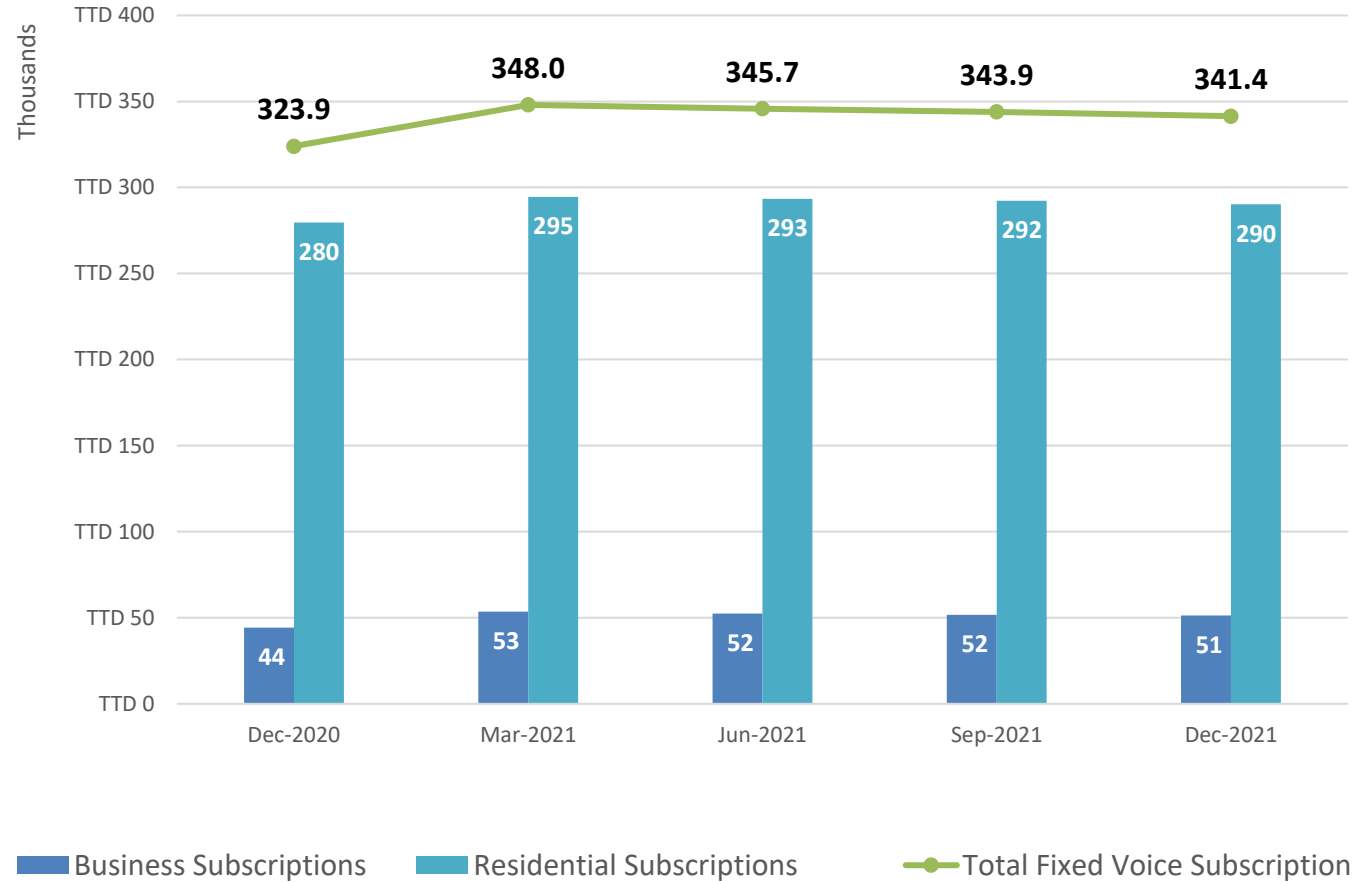
**5.4%**



**Q-o-Q PERCENT CHANGE**

**-0.7%**

Number of Fixed Line Subscriptions  
Q4 2020 to Q4 2021



# Fixed Voice Penetration



**FIXED VOICE  
PENETRATION PER  
100 INHABITANTS**

**25**



**Y-o-Y  
PERCENT  
CHANGE**

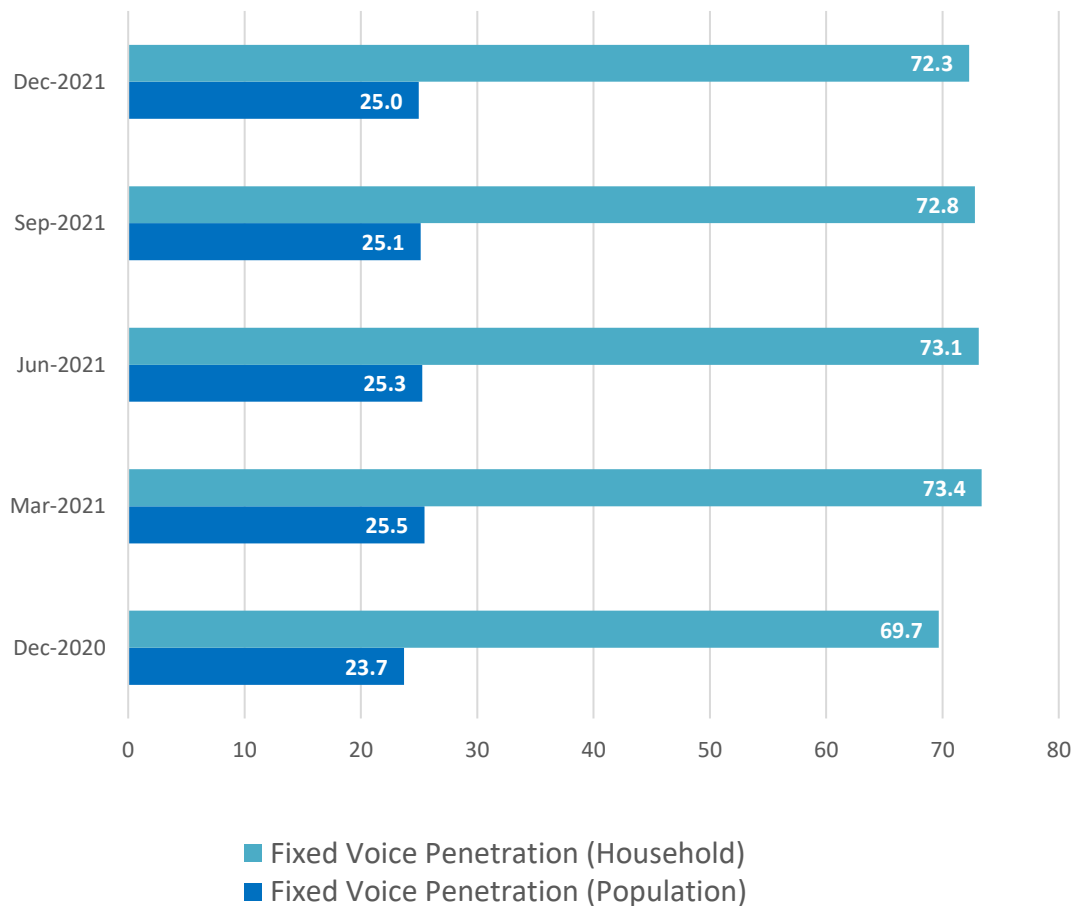
**5.3%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.7%**

Penetration Rate of Fixed Line Subscriptions  
from Q4 2020 to Q4 2021



**FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS**

**72.3**



**Y-o-Y  
PERCENT  
CHANGE**

**3.7%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.7%**

# Fixed Voice Revenues



**GROSS  
REVENUES**

**\$103.2m**



**Y-o-Y  
PERCENT  
CHANGE**

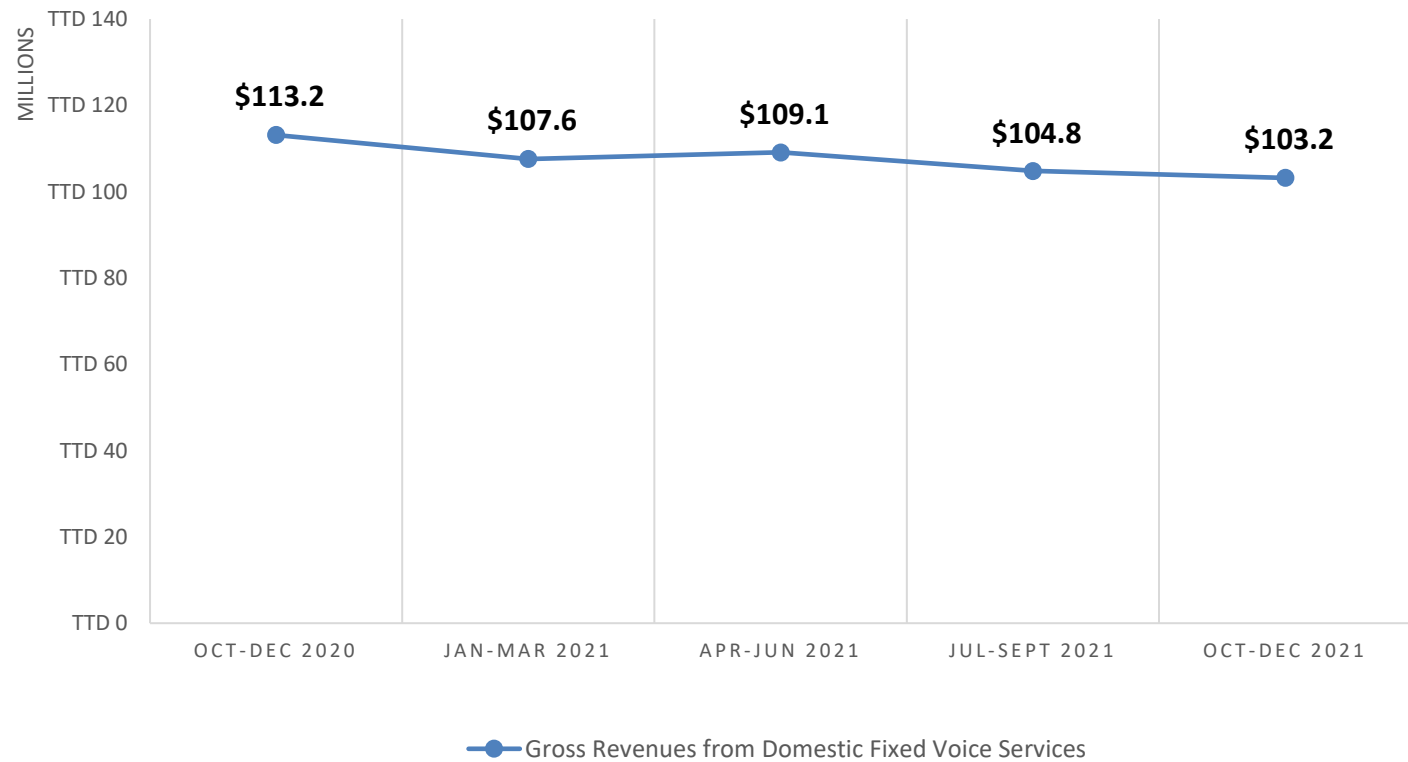
**-8.8%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.5%**

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q4 2020 TO Q4 2021





# Fixed Voice HHI



HHI

3,541



Y-o-Y  
PERCENT  
CHANGE

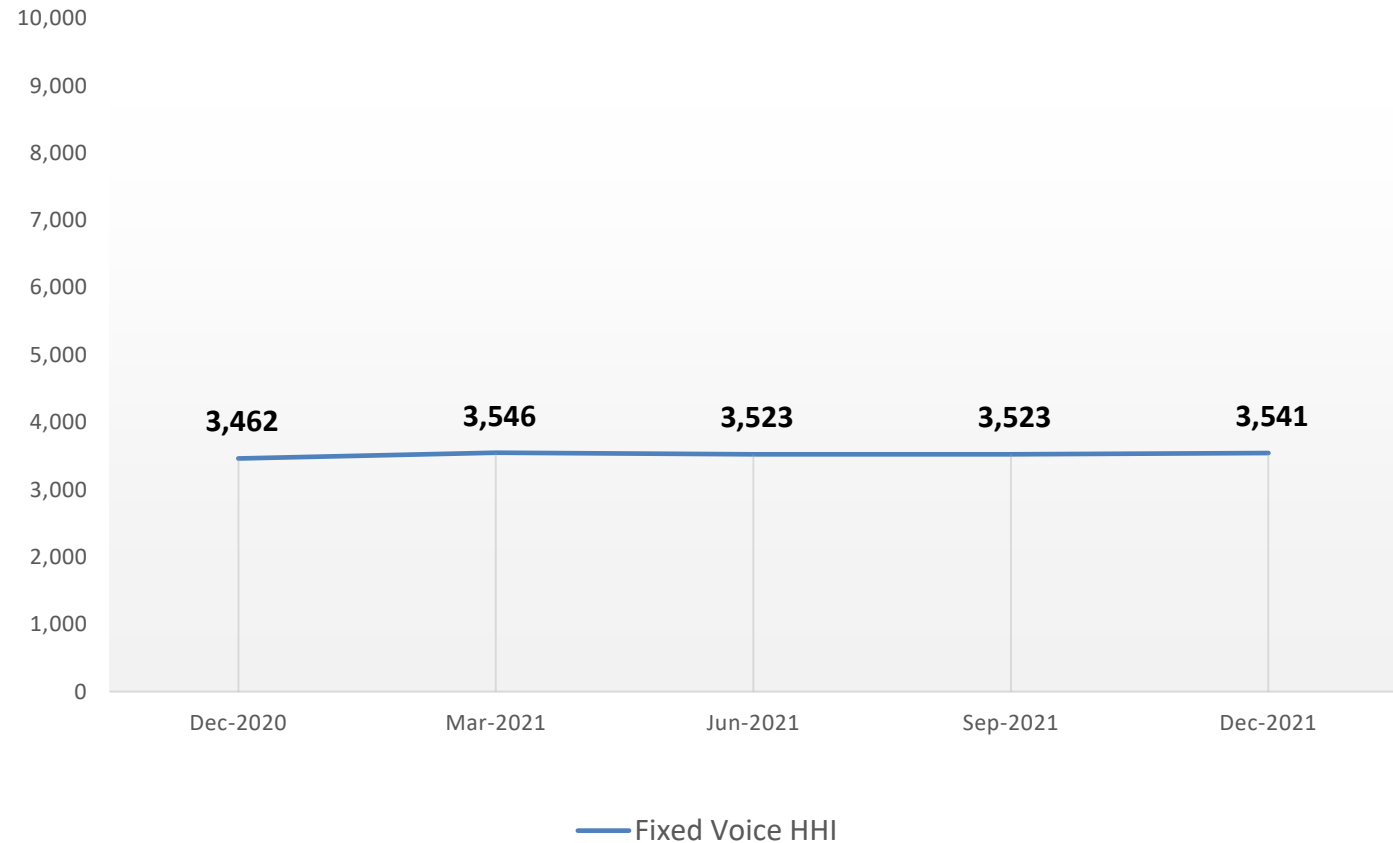
2.3%



Q-o-Q  
PERCENT  
CHANGE

0.5%

HHI for Domestic Fixed Line  
from Q4 2020 to Q4 2021



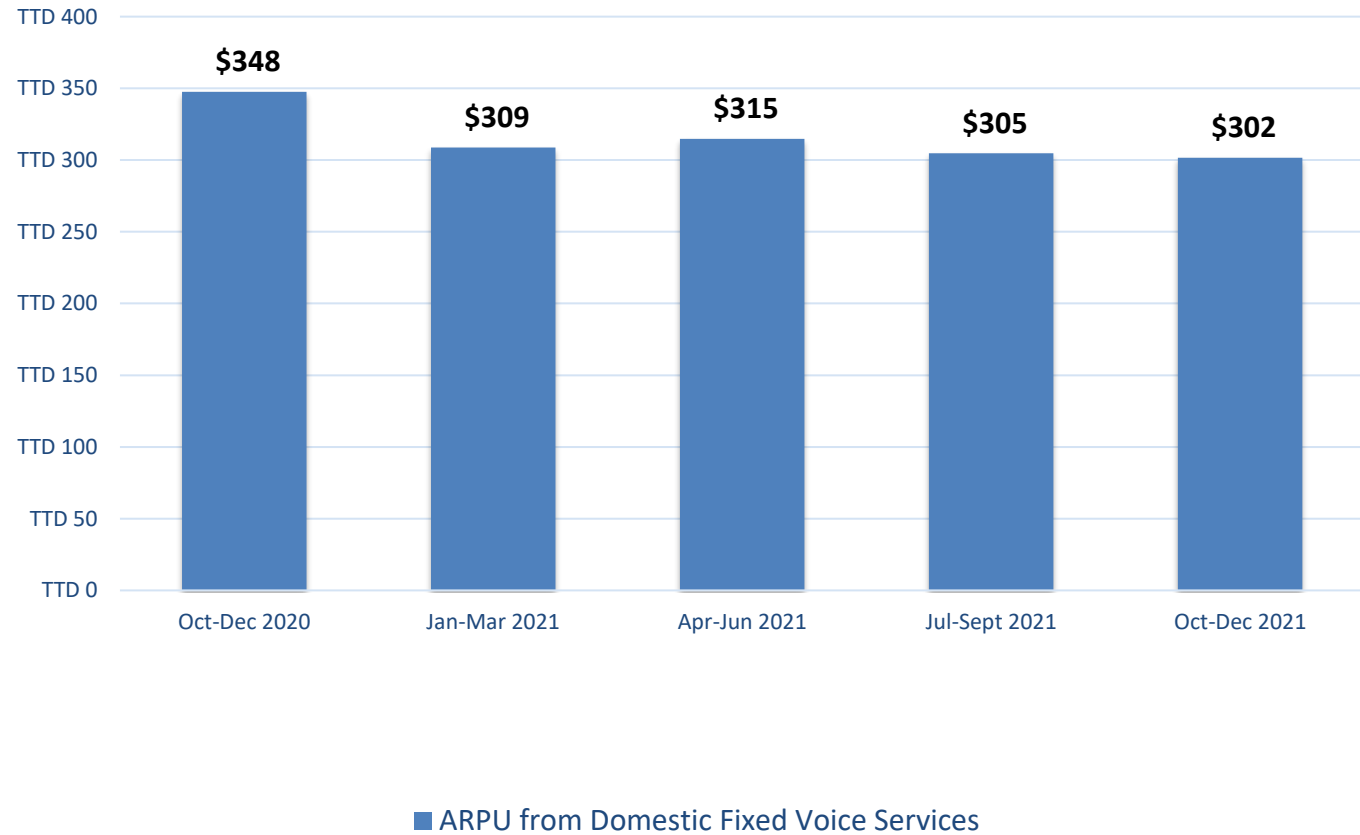
# Fixed Voice Average Revenue Per User

ARPU  
**\$302**

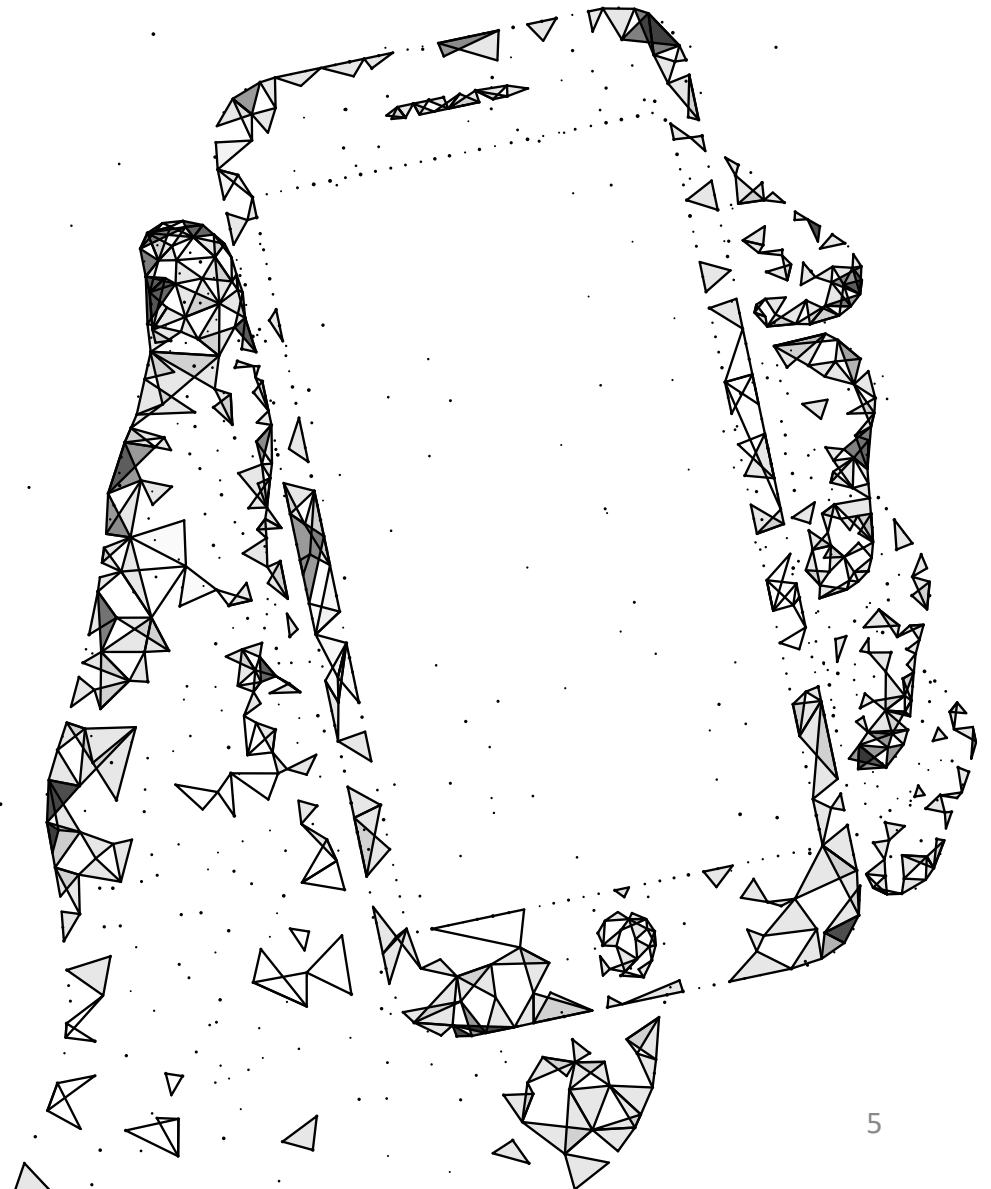
Y-o-Y  
PERCENT  
CHANGE  
**-13.2%**

Q-o-Q  
PERCENT  
CHANGE  
**-1.0%**

ARPU from Domestic Fixed Voice Services  
from Q4 2020 to Q4 2021



# Mobile Voice



# Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,996,800



Y-o-Y PERCENT CHANGE

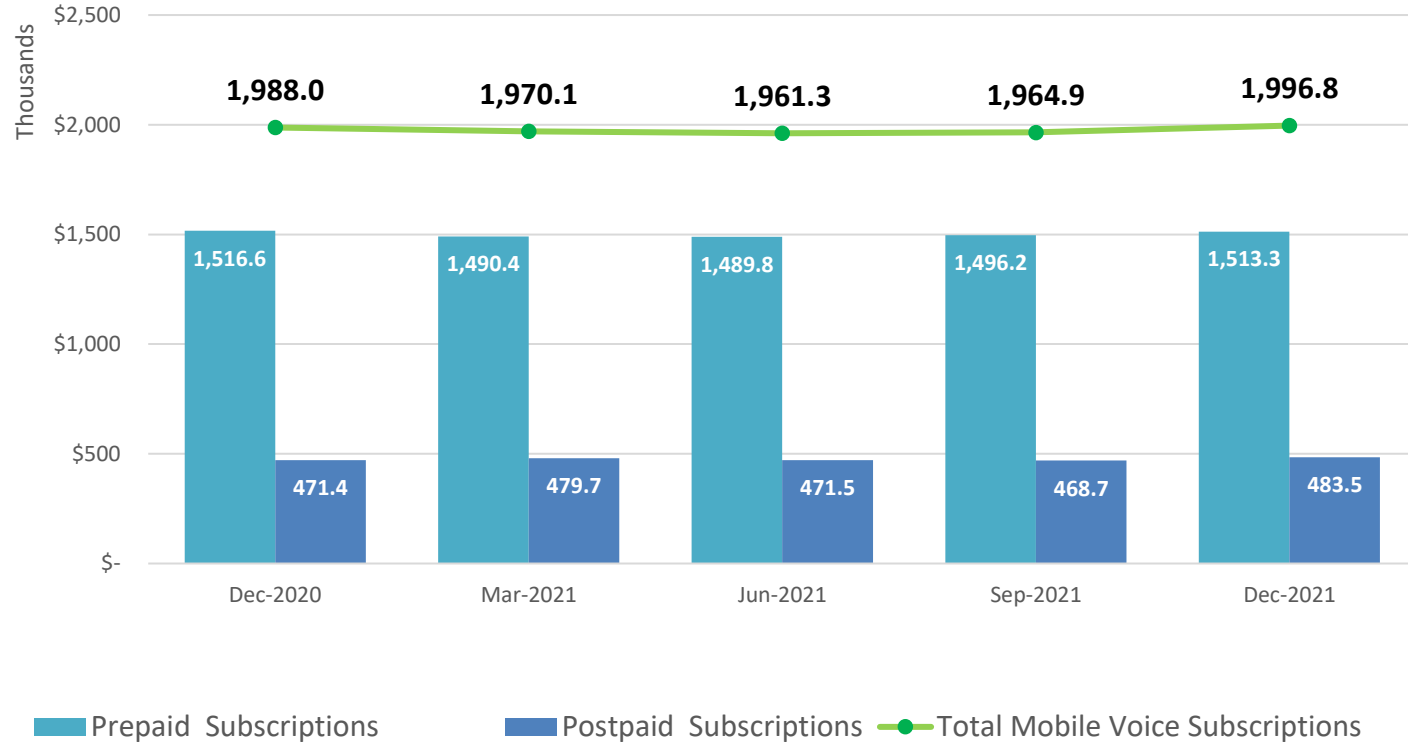
0.4%



Q-o-Q PERCENT CHANGE

1.6%

Number of Mobile Voice Subscriptions from Q4 2020 to Q4 2021



# Mobile Voice Penetration



**MOBILE VOICE  
PENETRATION  
PER 100  
INHABITANTS**

**146**



**Y-o-Y  
PERCENT  
CHANGE**

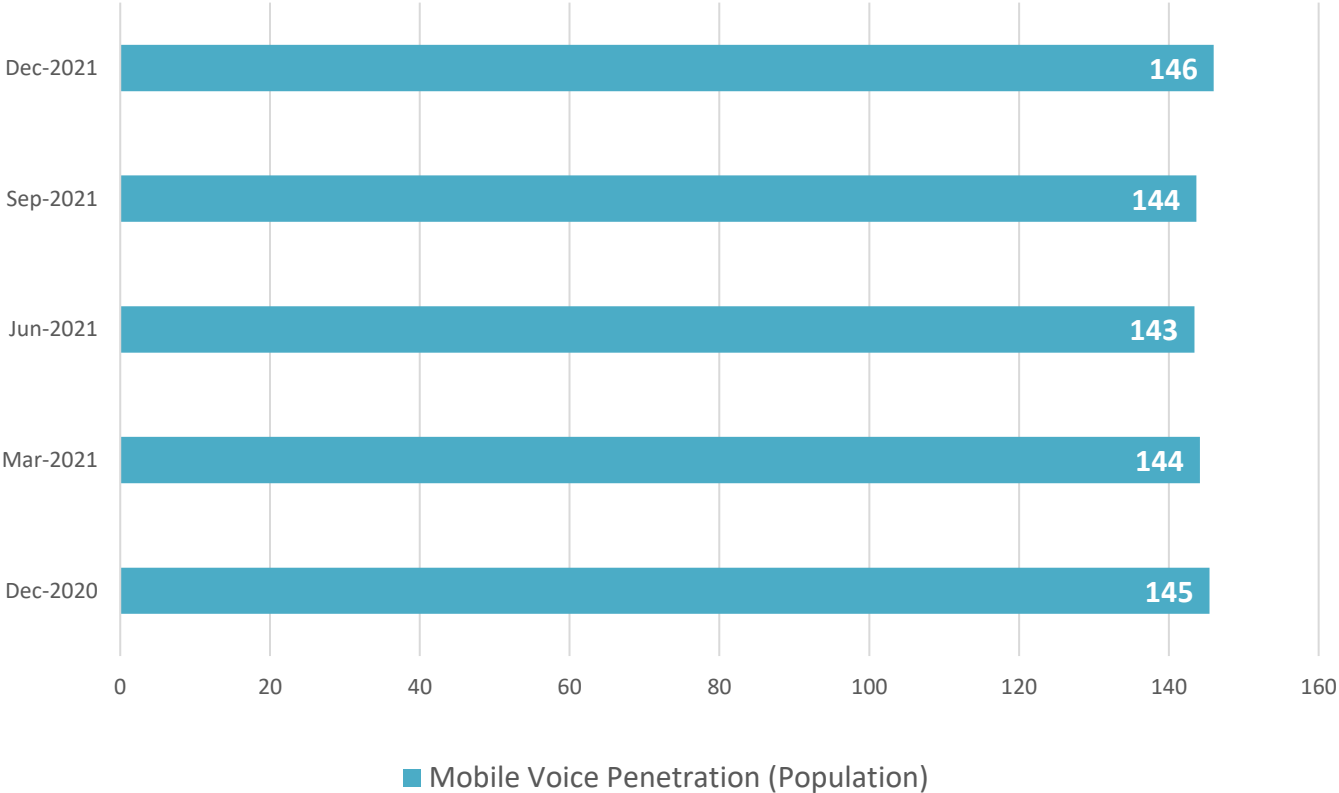
**0.4%**



**Q-o-Q  
PERCENT  
CHANGE**

**1.6%**

Penetration of Mobile Voice Subscriptions  
from Q4 2020 to Q4 2021



# Mobile Services Revenues



**GROSS REVENUES**

**\$ 487.6m**



**Y-o-Y PERCENT CHANGE**

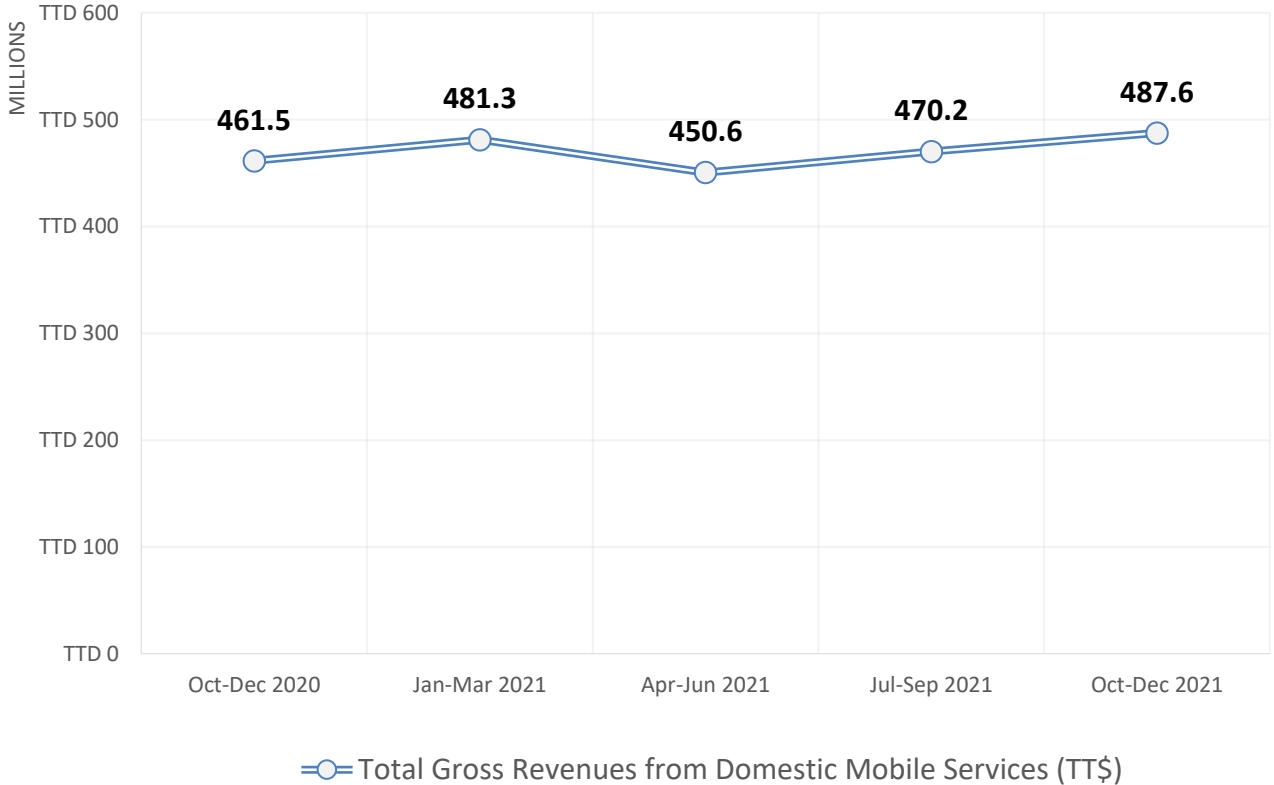
**5.7%**



**Q-o-Q PERCENT CHANGE**

**3.7%**

**TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$) FROM Q4 2020 TO Q4 2021**



*Includes revenues from Mobile voice and Internet services.*

# Mobile Voice HHI



HHI

5,146



Y-o-Y  
PERCENT  
CHANGE

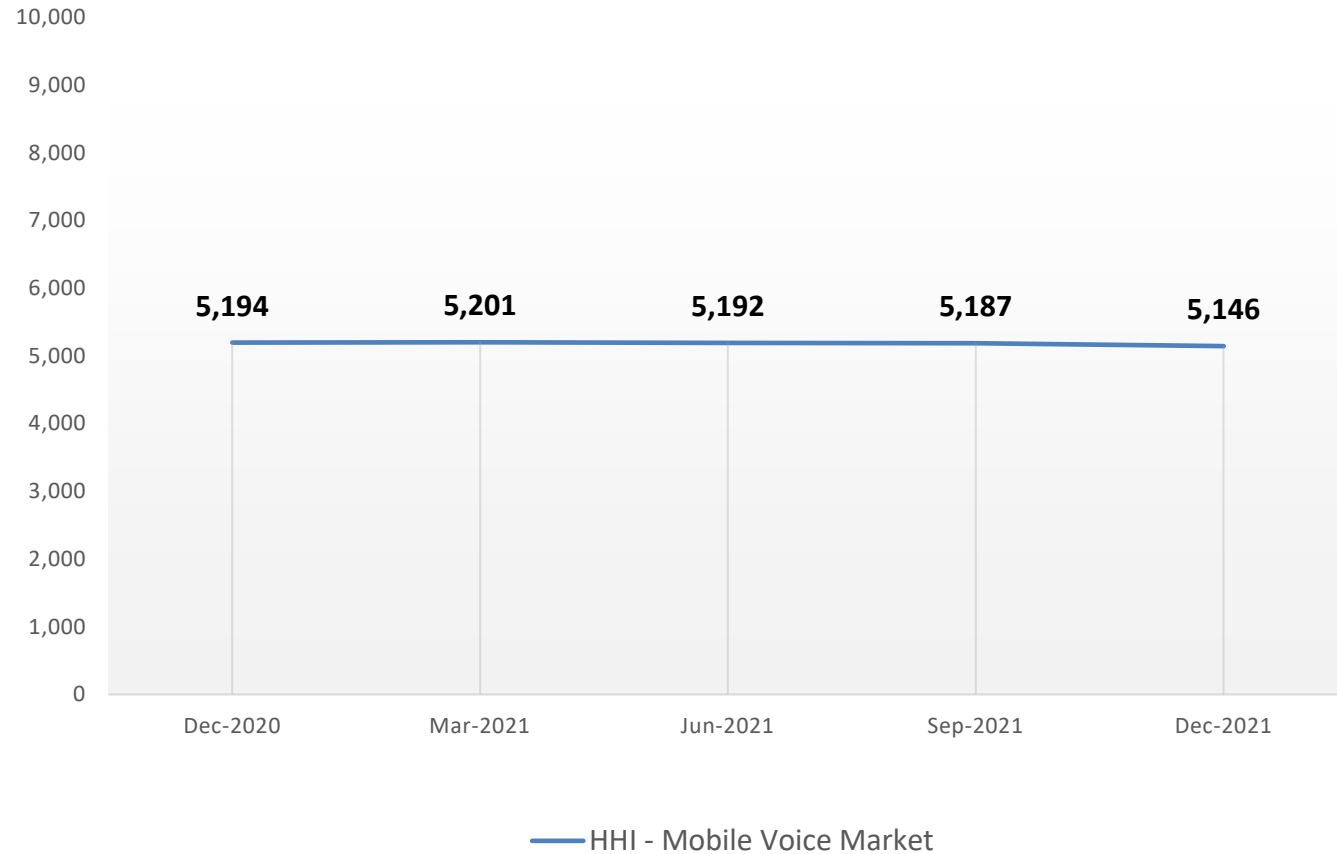
-0.9%



Q-o-Q  
PERCENT  
CHANGE

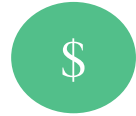
-0.8%

HHI for Domestic Mobile Services  
from Q4 2020 to Q4 2021



# Average Revenue Per User

## Mobile Services



ARPU  
**\$245**

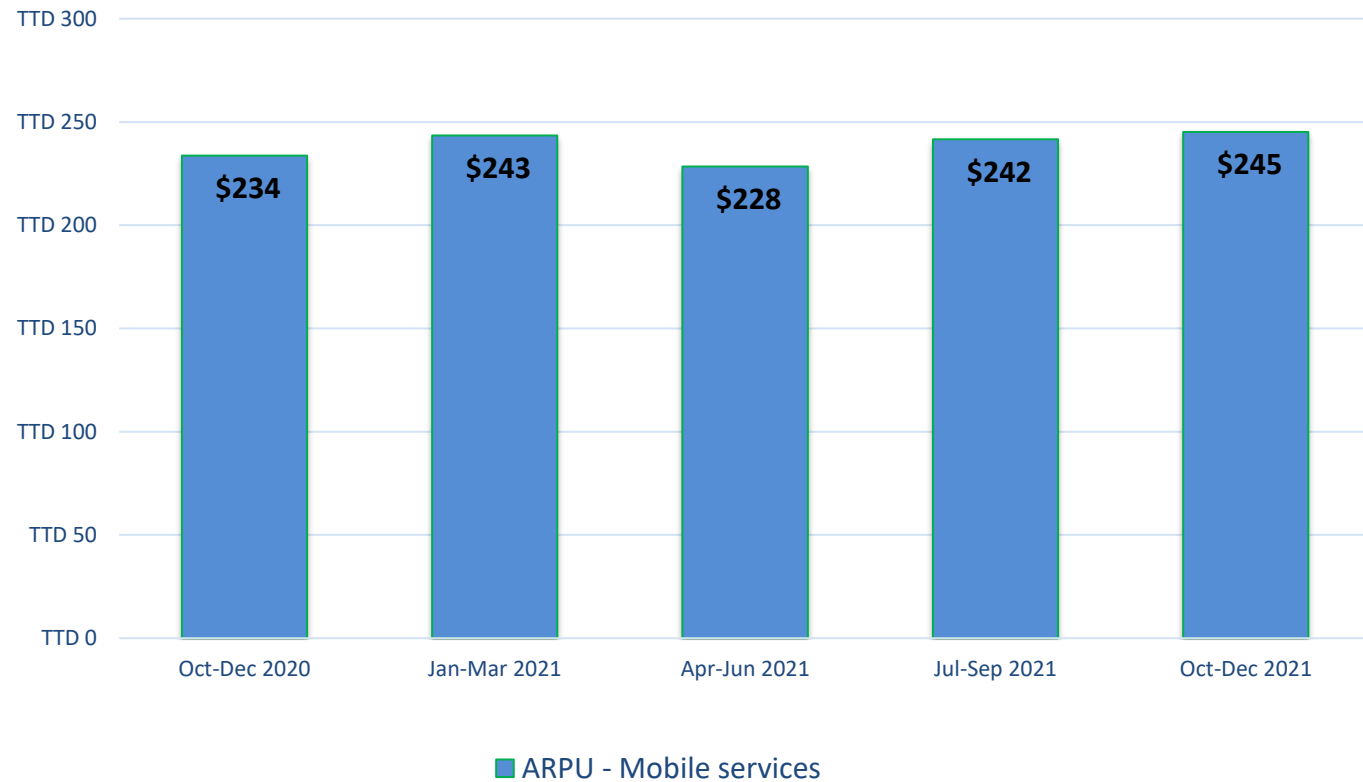


Y-o-Y  
PERCENT  
CHANGE  
**4.9%**



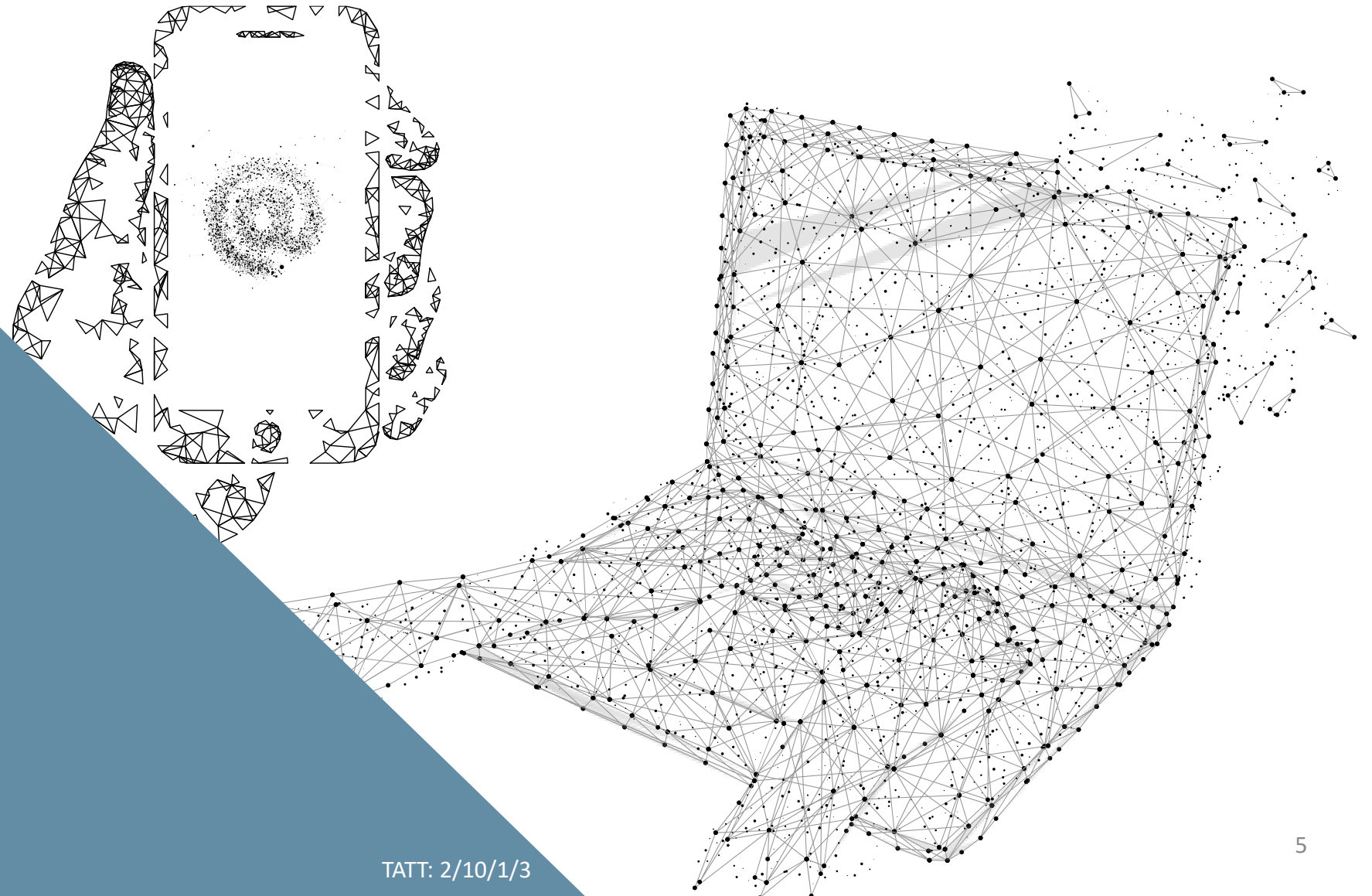
Q-o-Q  
PERCENT  
CHANGE  
**1.5%**

ARPU for Domestic Mobile Services  
from Q4 2020 to Q4 2021





# Internet



# Fixed Broadband Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

364,100



Y-o-Y PERCENT CHANGE

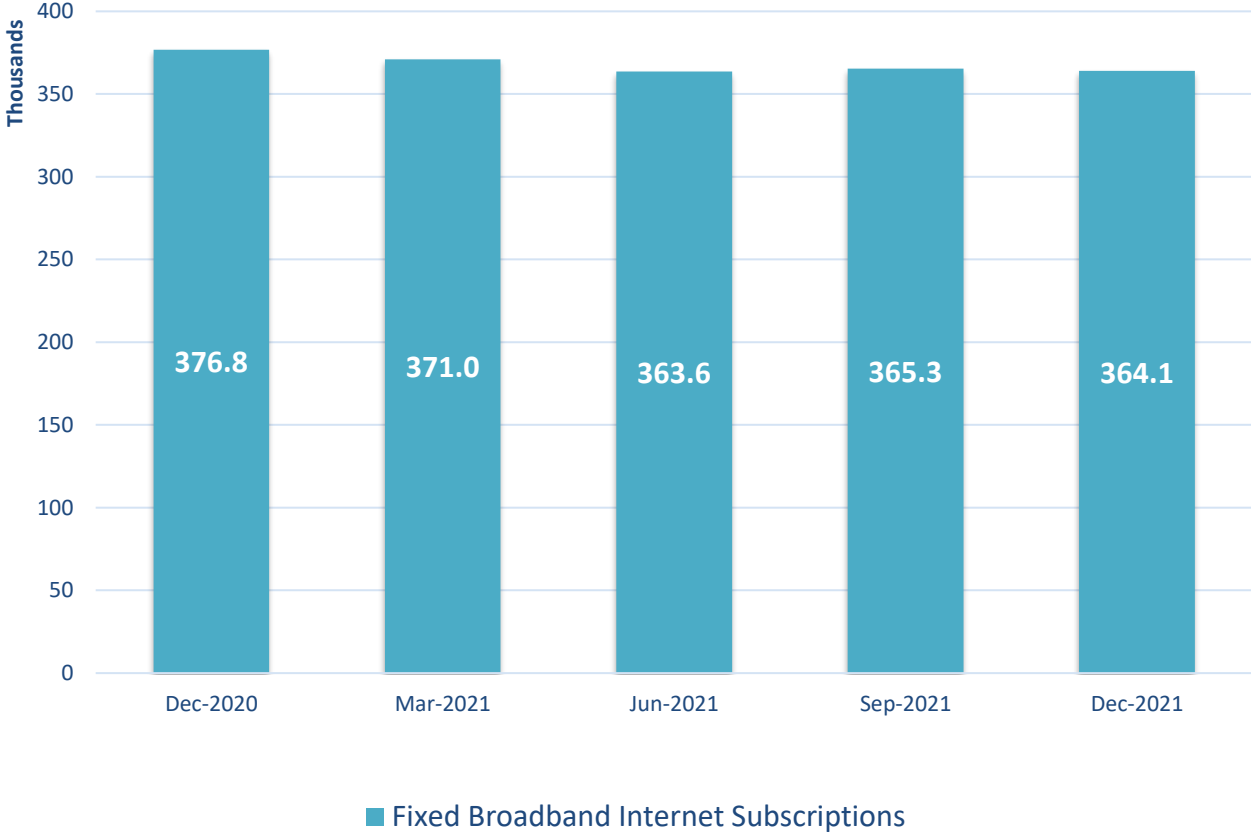
-3.4%



Q-o-Q PERCENT CHANGE

-0.3%

Number of Fixed Broadband Internet Subscriptions from Q4 2020 to Q4 2021



# Fixed Internet Penetration



**FIXED INTERNET  
PENETRATION  
PER 100  
INHABITANTS**

**27**



**Y-o-Y  
PERCENT  
CHANGE**

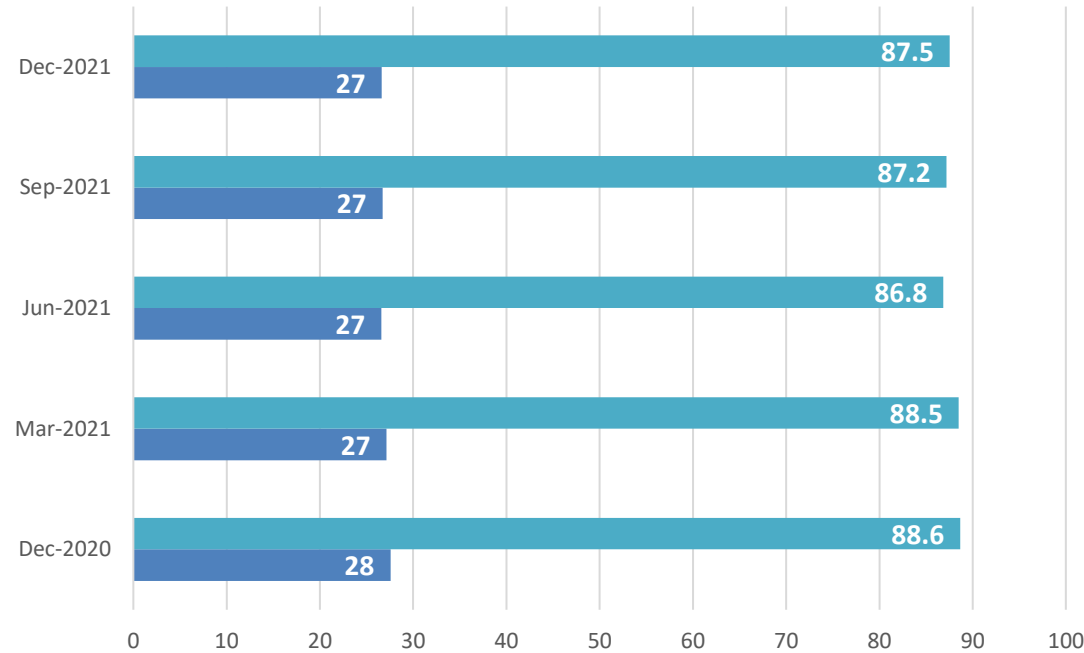
**-3.4%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.3%**

Penetration for Fixed Internet Subscriptions  
from Q4 2020 to Q4 2021



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



**FIXED INTERNET  
PENETRATION  
PER 100  
HOUSEHOLDS**

**87.5**



**Y-O-Y  
PERCENT  
CHANGE**

**-1.3%**



**Q-O-Q  
PERCENT  
CHANGE**

**0.4%**

# Mobile Internet Penetration



**MOBILE INTERNET  
PENETRATION PER  
100 INHABITANTS**

**60**



**Y-o-Y  
PERCENT  
CHANGE**

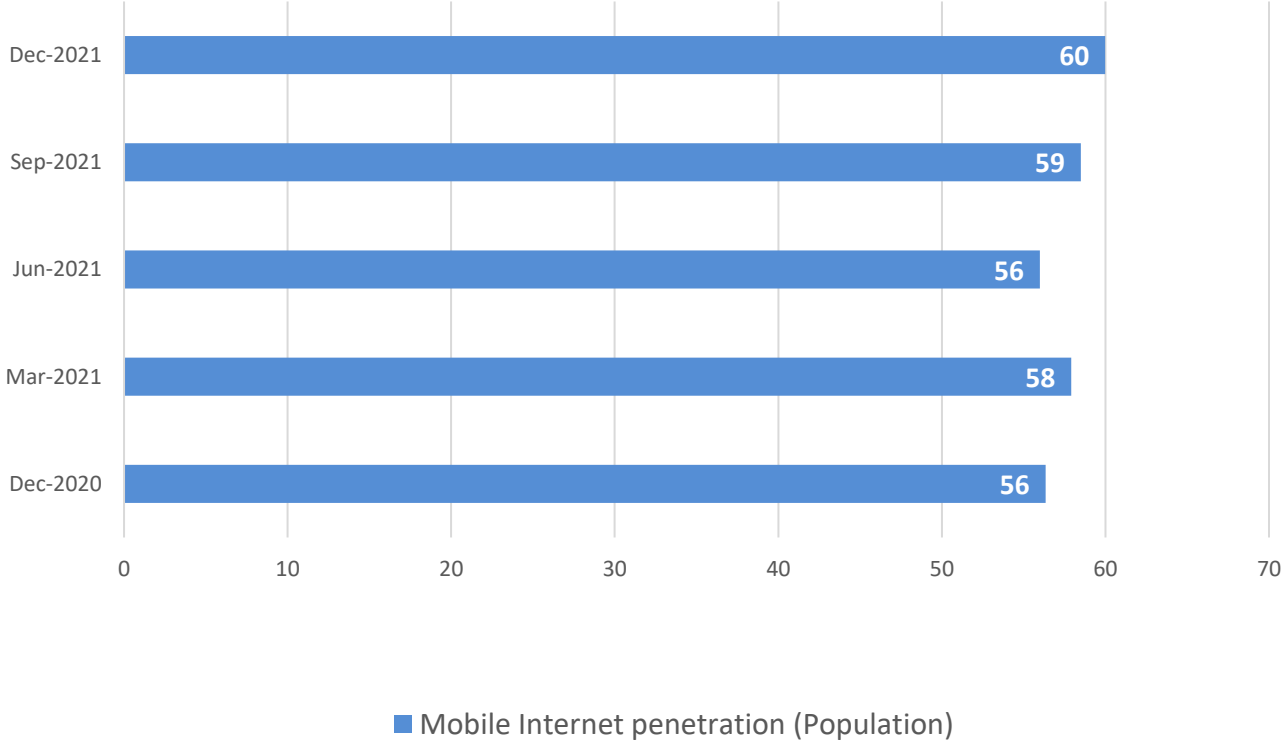
**6.5%**



**Q-o-Q  
PERCENT  
CHANGE**

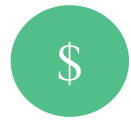
**2.5%**

Penetration for Mobile Internet Subscriptions  
from Q4 2020 to Q4 2021



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

# Fixed Internet Revenues



**GROSS REVENUES**  
**\$ 311m**



**Y-o-Y PERCENT CHANGE**

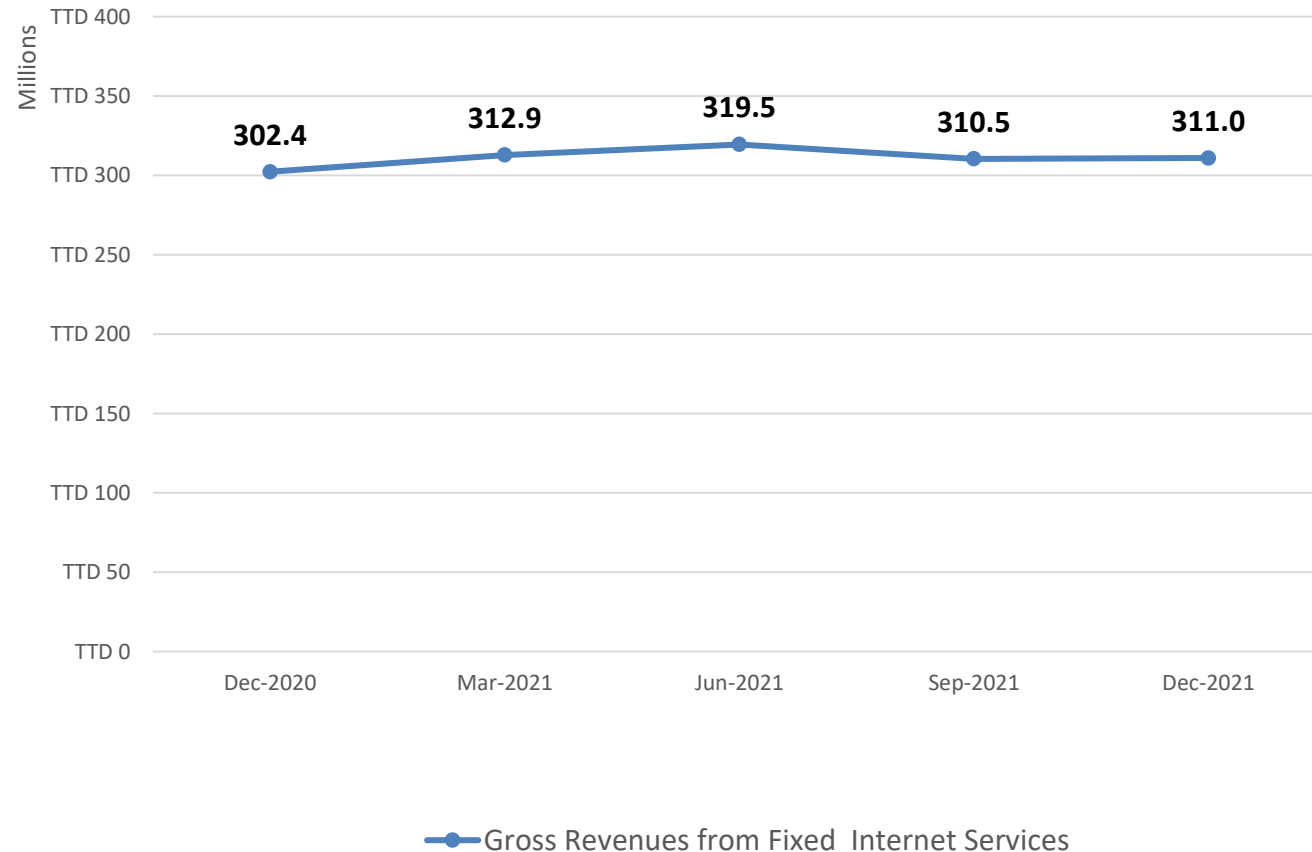
**2.8%**



**Q-o-Q PERCENT CHANGE**

**0.2%**

Gross Revenues from Fixed Internet Services  
from Q4 2020 to Q4 2021



# Fixed Internet HHI



HHI  
**2,883**



Y-o-Y  
PERCENT  
CHANGE

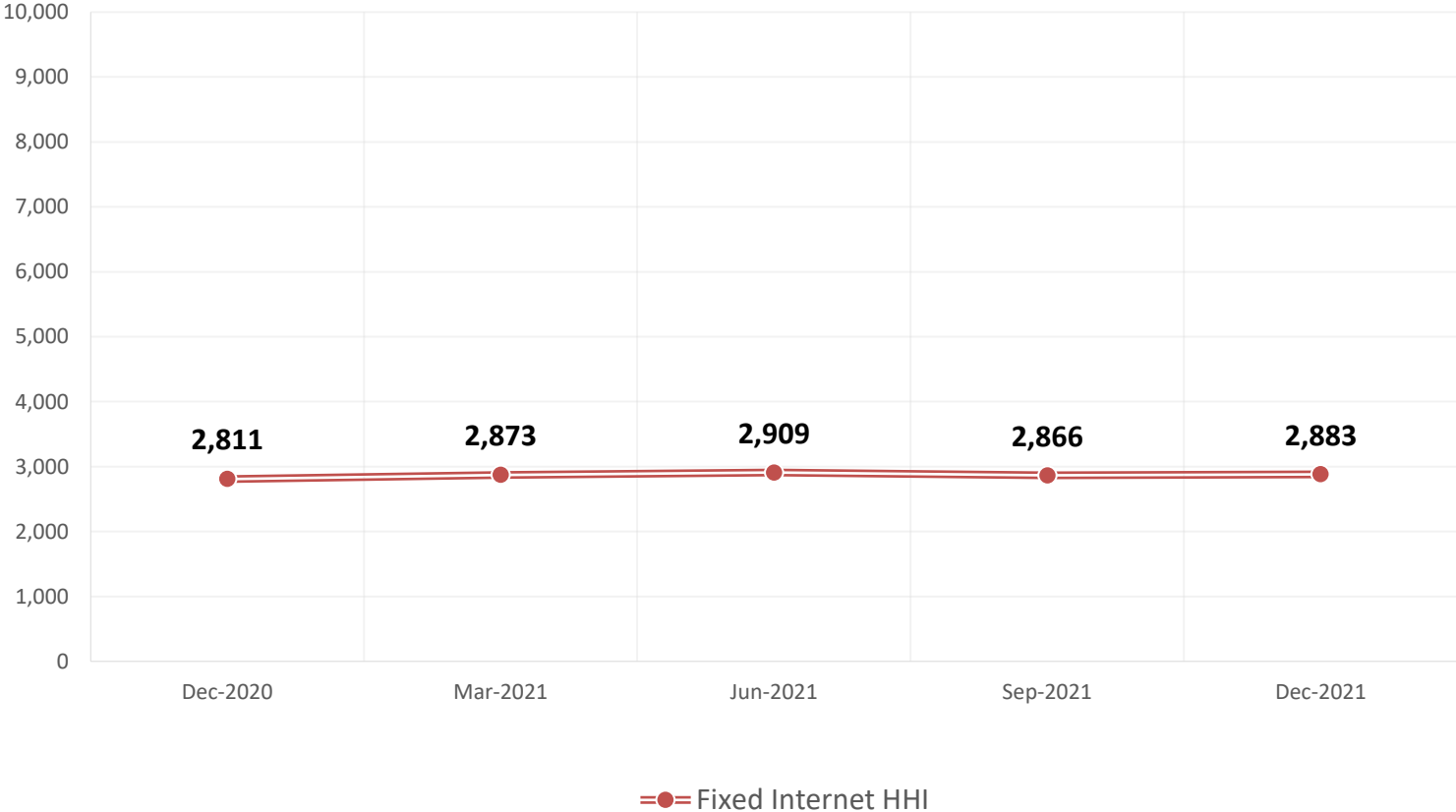
**2.6%**



Q-o-Q  
PERCENT  
CHANGE

**0.6%**

HHI FOR FIXED INTERNET SERVICES  
FROM Q4 2020 TO Q4 2021



# Fixed Internet Average Revenue Per User



ARPU  
**\$856**

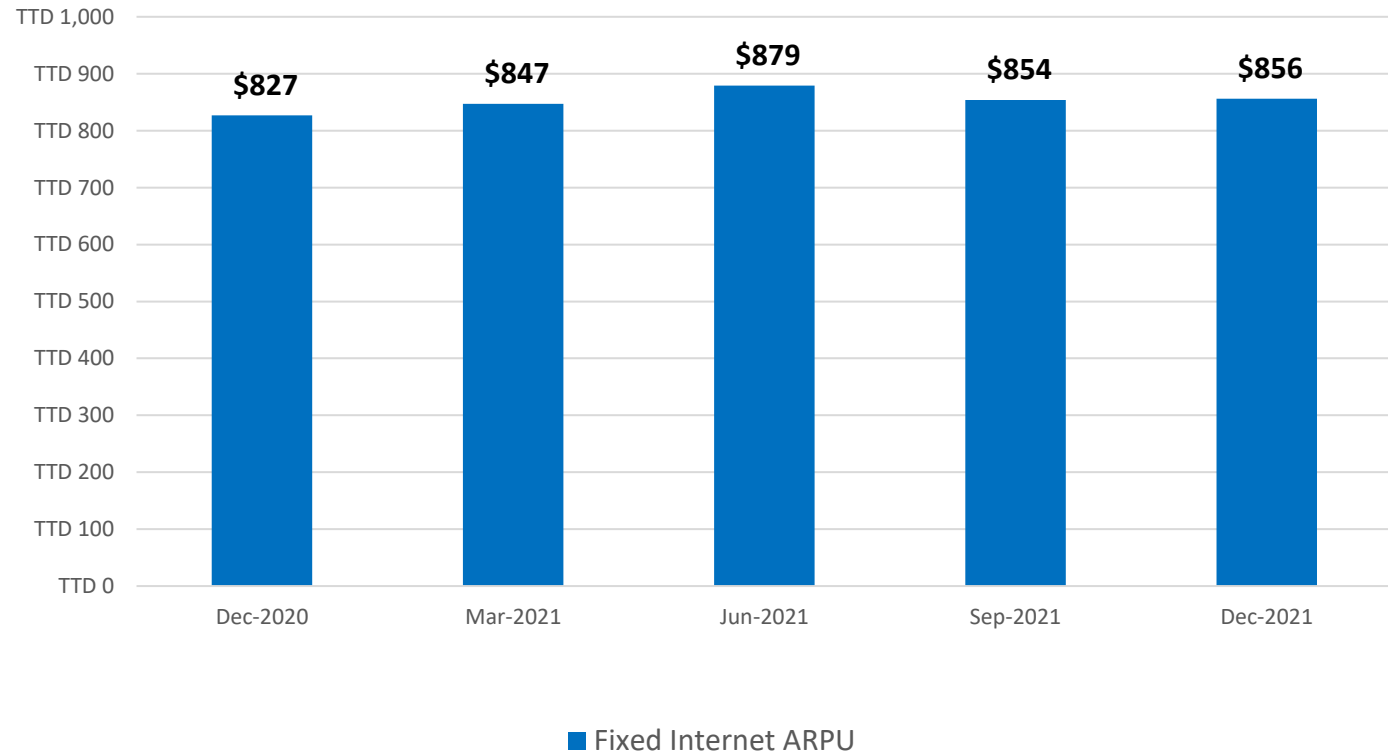


Y-o-Y  
PERCENT  
CHANGE  
**3.6%**



Q-o-Q  
PERCENT  
CHANGE  
**0.3%**

ARPU for Fixed Internet Services  
from Q4 2020 to Q4 2021



# Pay TV





# Pay TV Subscriptions



TOTAL NUMBER  
OF  
SUBSCRIPTIONS

**237,800**



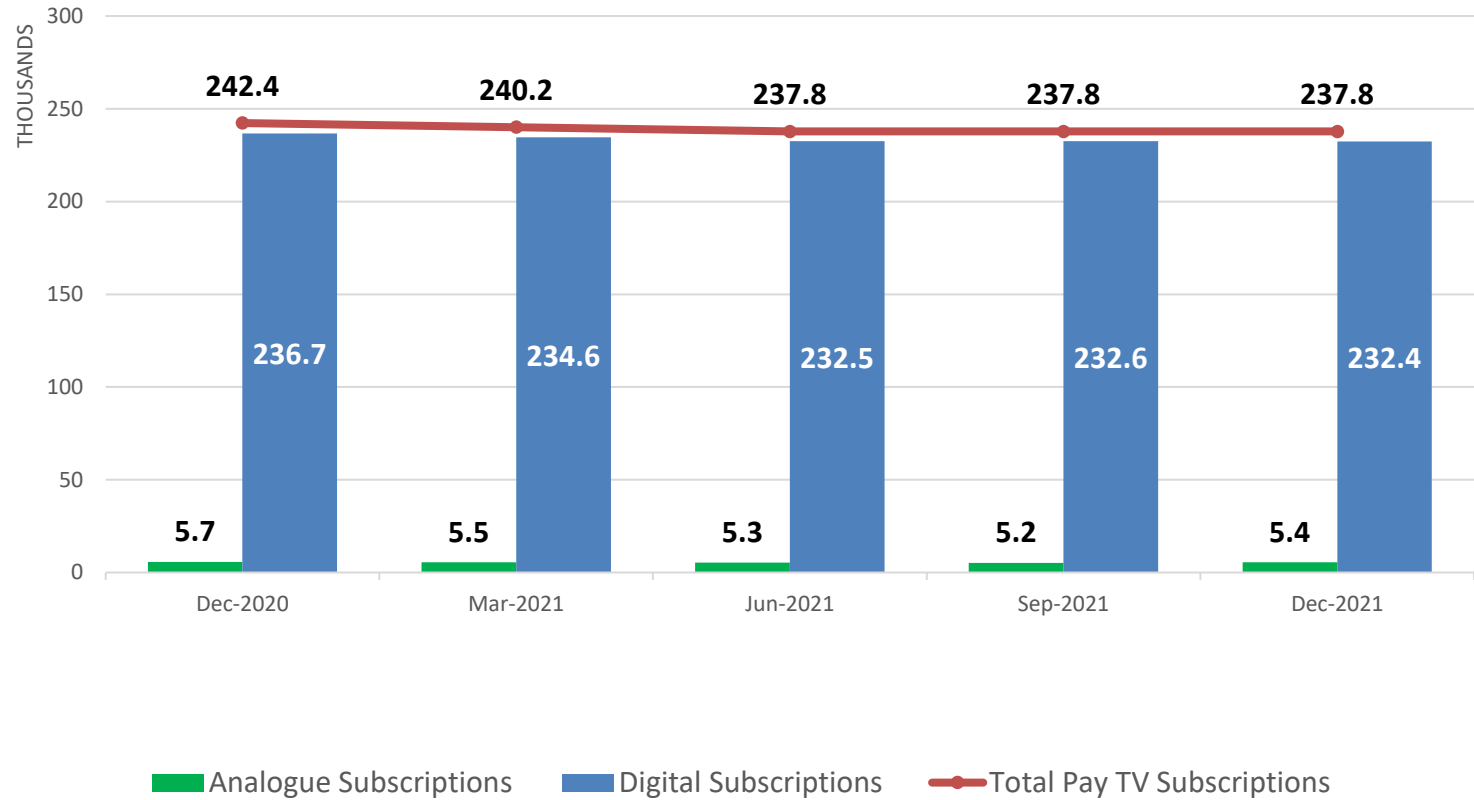
Y-o-Y  
PERCENT  
CHANGE

**-1.9%**

Q-o-Q  
PERCENT  
CHANGE

**0%**

Number of Pay TV Subscriptions  
from Q4 2020 to Q4 2021



# Pay TV Penetration



**PAY TV  
PENETRATION  
PER 100  
INHABITANTS**

**17.2**



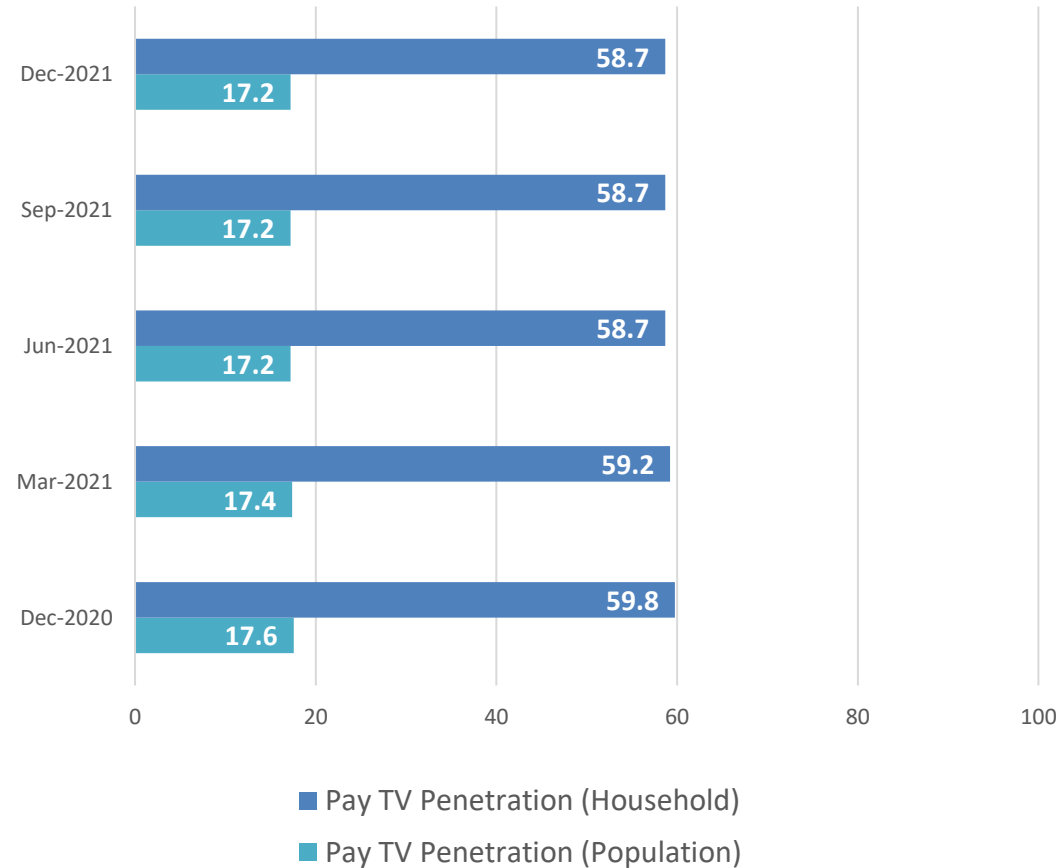
**Y-o-Y  
PERCENT  
CHANGE**

**-1.9%**

**Q-o-Q  
PERCENT  
CHANGE**

**0%**

**Penetration Rates of Pay TV Services  
from Q4 2020 to Q4 2021**



**PAY TV  
PENETRATION  
PER 100  
HOUSEHOLDS**

**58.7**



**Y-O-Y  
PERCENT  
CHANGE**

**-1.8%**

**Q-O-Q  
PERCENT  
CHANGE**

**0%**

# Pay TV Revenues



**GROSS REVENUES**

**\$161.4m**



**Y-o-Y PERCENT CHANGE**

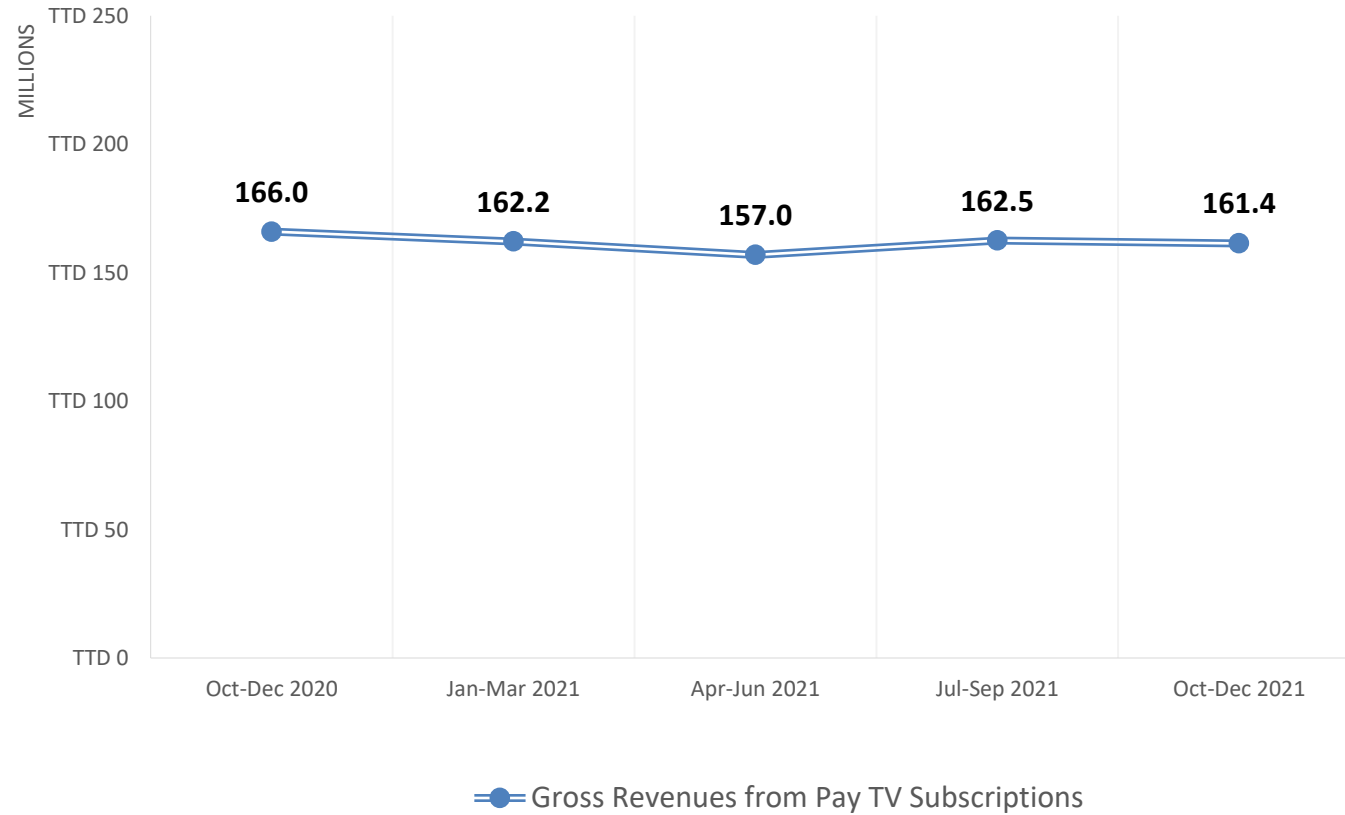
**-2.7%**



**Q-o-Q PERCENT CHANGE**

**-0.7%**

GROSS REVENUES FROM PAY TV SERVICES FROM Q4 2020 TO Q4 2021



# Pay TV HHI



HHI  
**3,301**

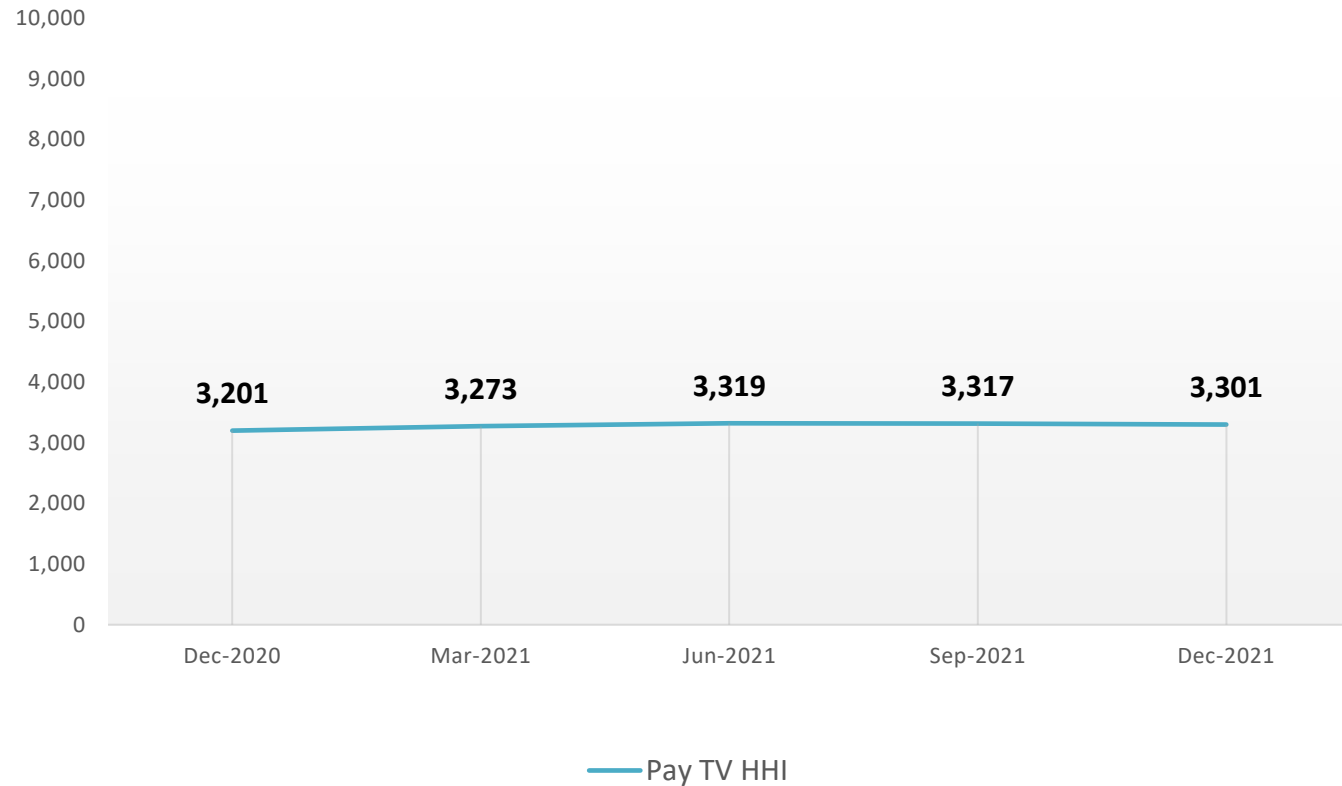


Y-o-Y  
PERCENT  
CHANGE  
**3.1%**



Q-o-Q  
PERCENT  
CHANGE  
**-0.5%**

HHI for Pay TV Services  
from Q4 2020 to Q4 2021



# Pay TV

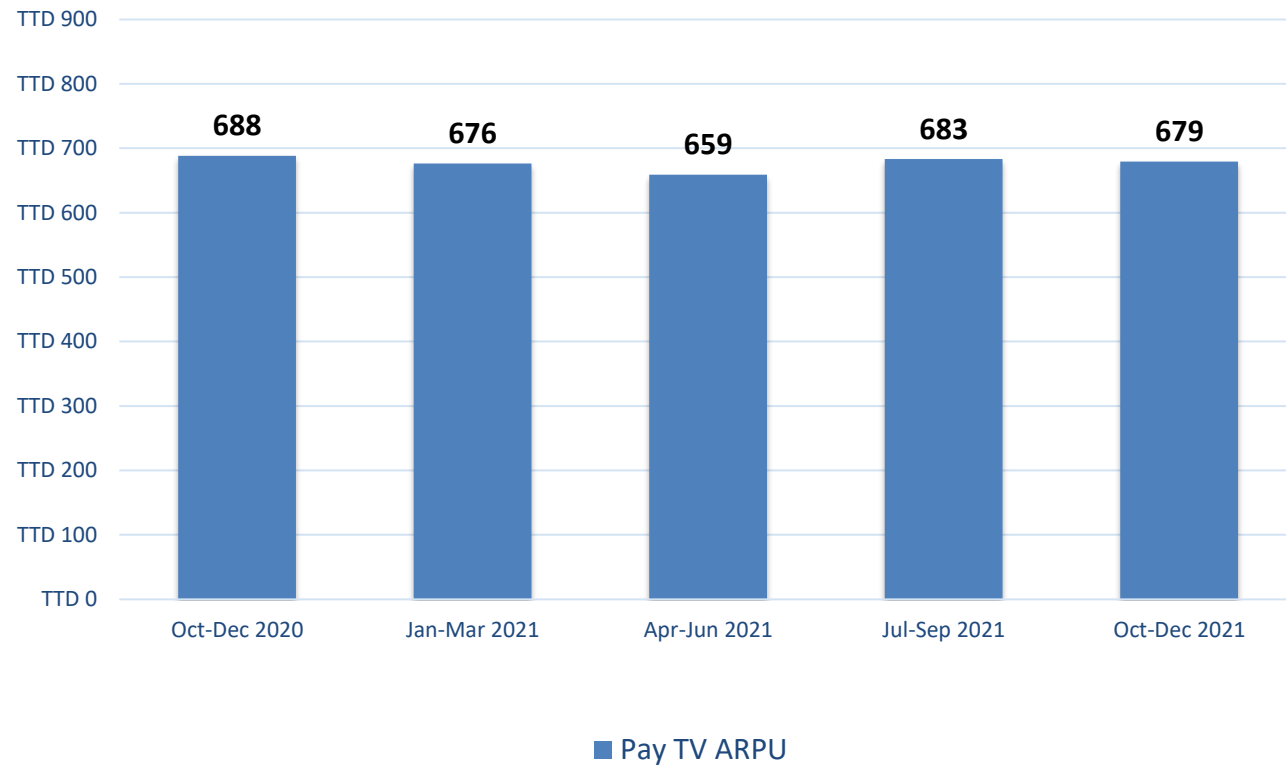
## Average Revenue Per User

ARPU  
\$ **\$679**

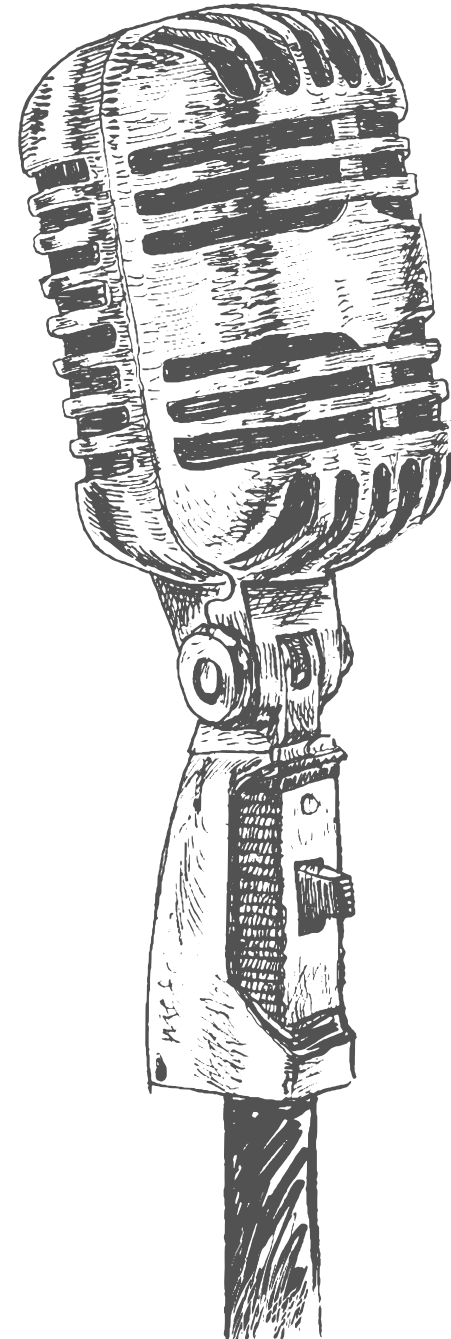
Y-o-Y  
PERCENT  
CHANGE  
**-1.3%**

Q-o-Q  
PERCENT  
CHANGE  
**-0.6%**

ARPU for Pay TV Services  
from Q4 2020 to Q4 2021



# Free-to-Air Radio



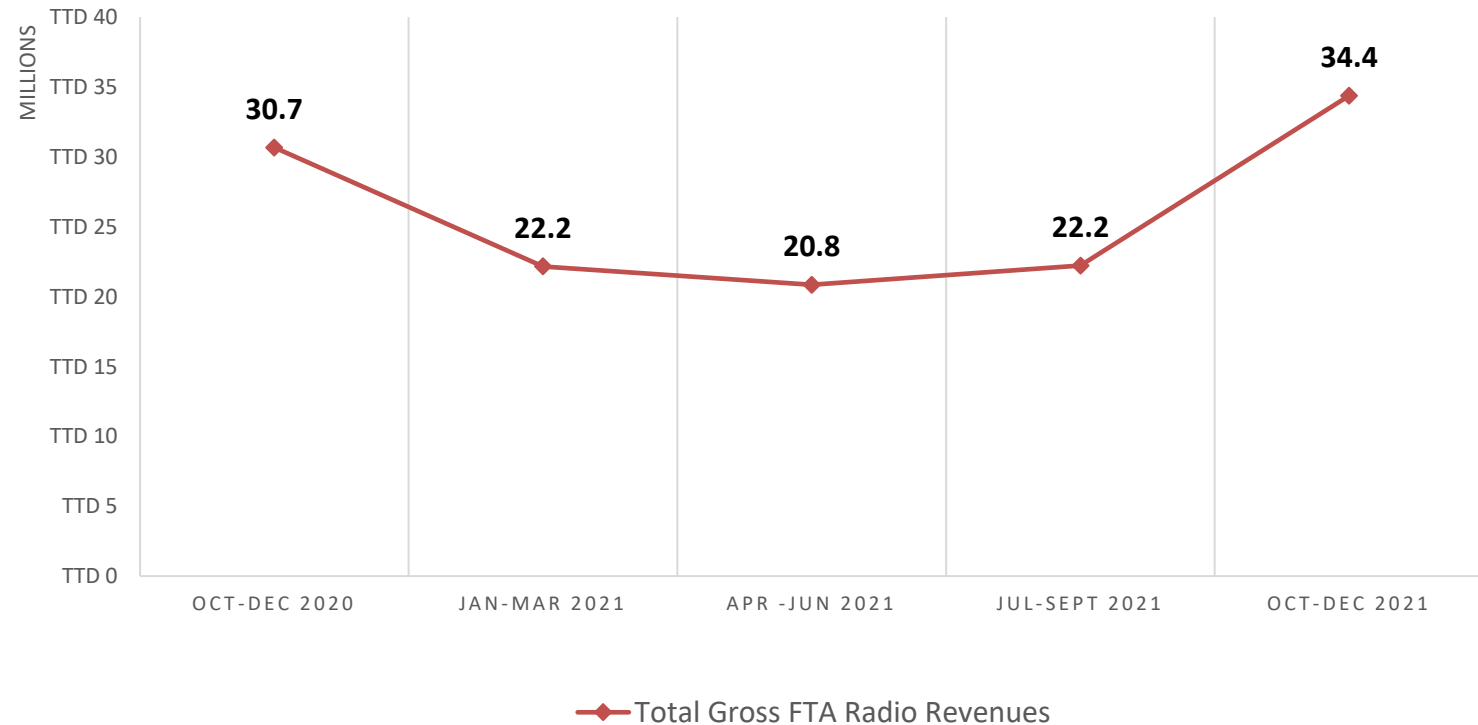
# Free-to-Air Radio Revenues

\$
**GROSS REVENUES**  
\$34.4m

↑
**Y-o-Y PERCENT CHANGE**  
12%

↑
**Q-o-Q PERCENT CHANGE**  
54.6%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q4 2020 TO Q4 2021



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

# Free-to-Air Radio HHI



HHI  
**478**

Y-o-Y  
PERCENT  
CHANGE

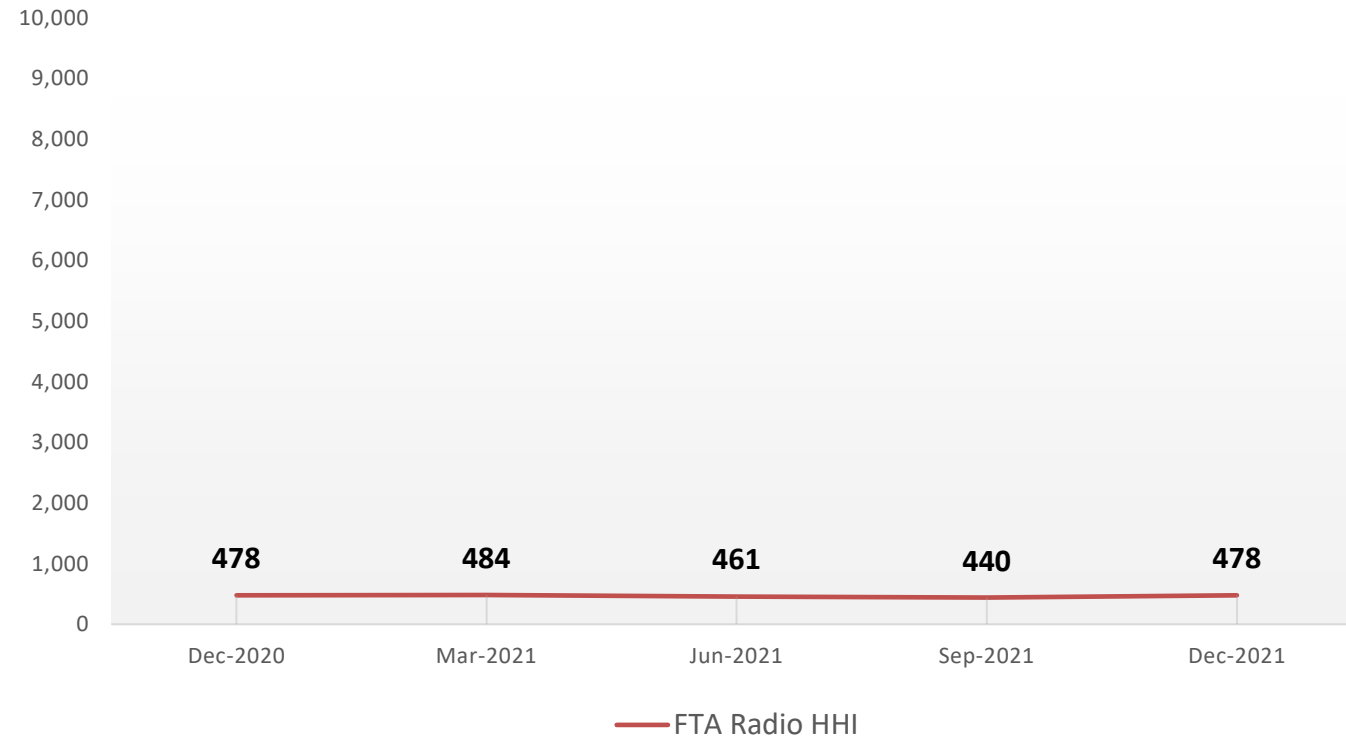
**0%**

Q-o-Q  
PERCENT  
CHANGE



**8.5%**

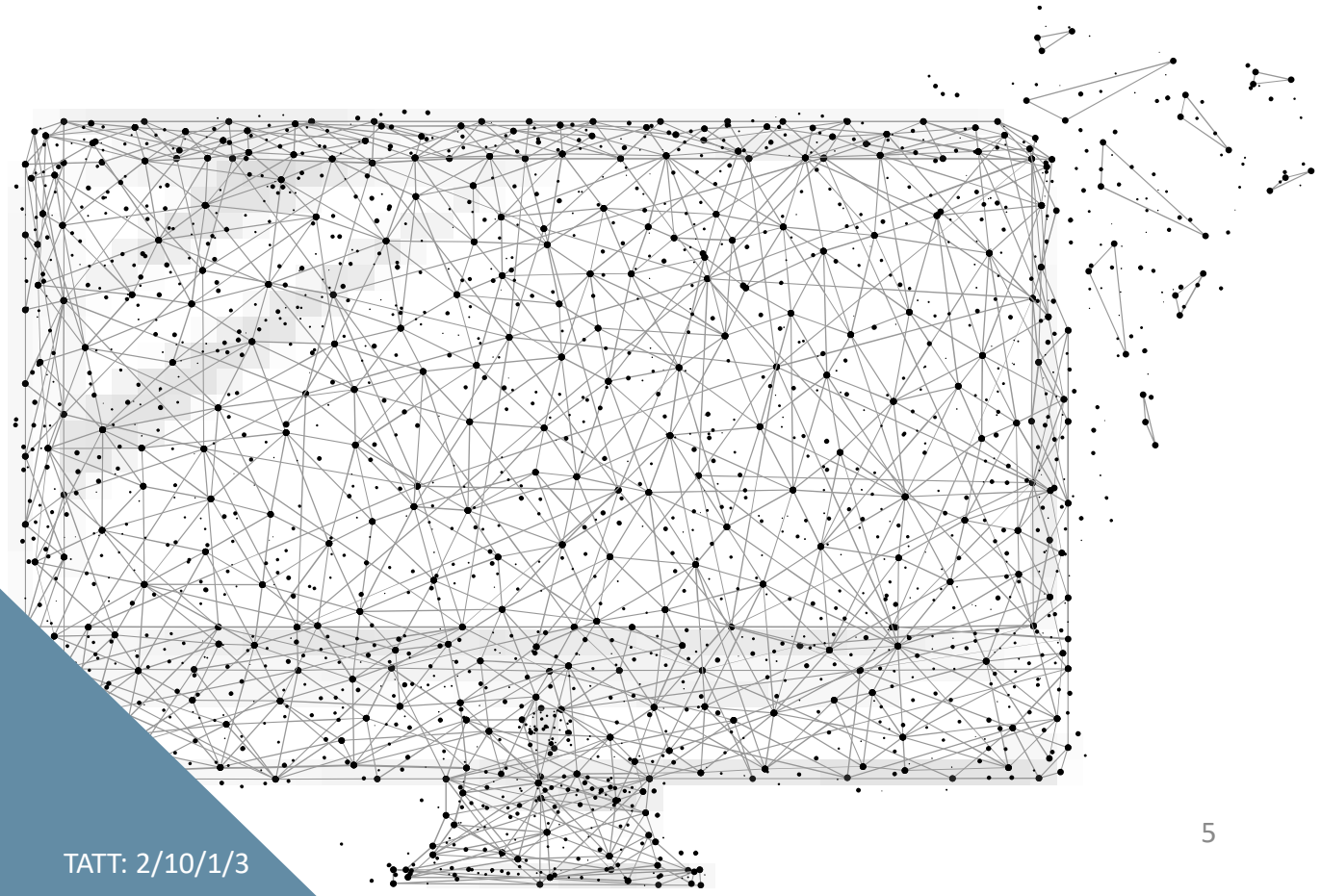
HHI FOR FREE TO AIR RADIO SERVICES  
FROM Q4 2020 TO Q4 2021



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



# Free-to-Air TV



# Free-to-Air TV Revenues



GROSS REVENUES

**\$18.1m**



Y-o-Y PERCENT CHANGE

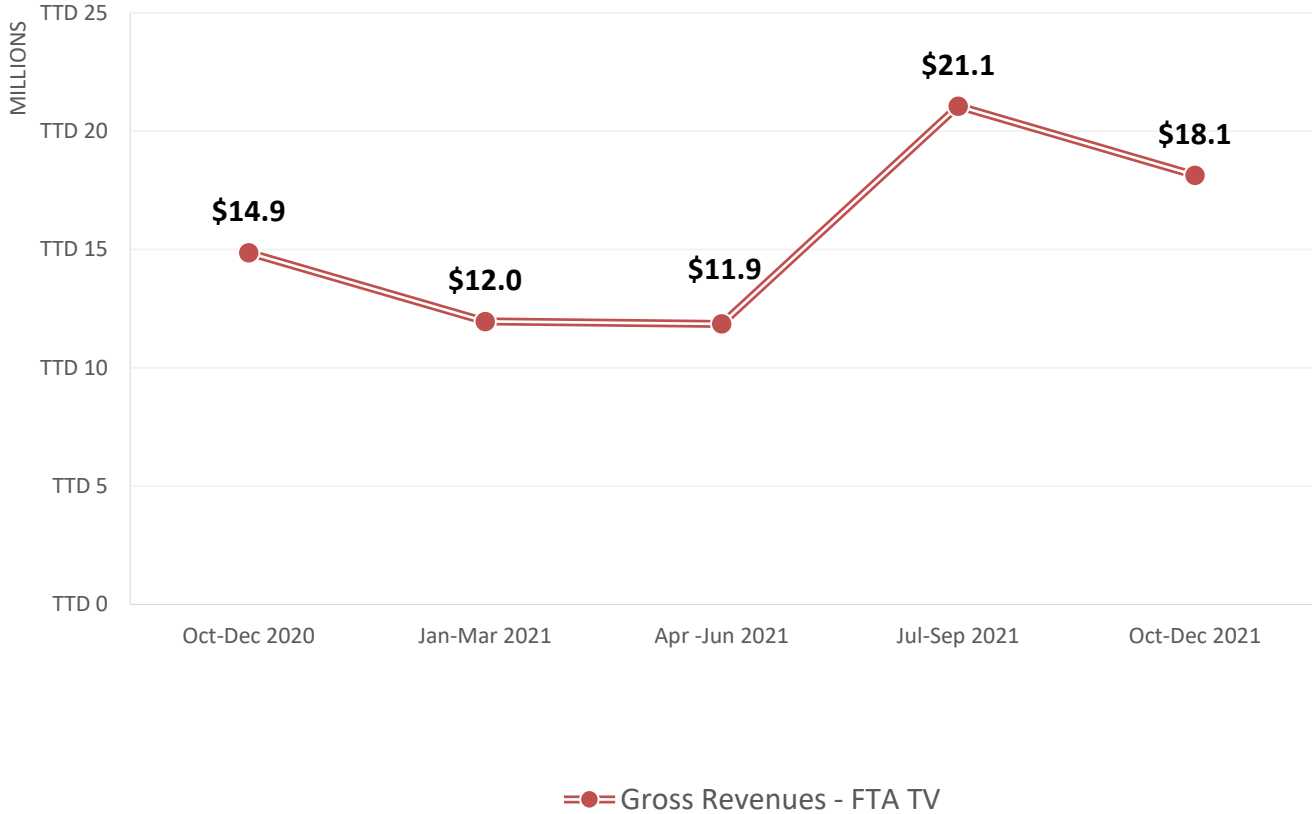
**22%**



Q-o-Q PERCENT CHANGE

**-13.9%**

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q4 2020 TO Q4 2021



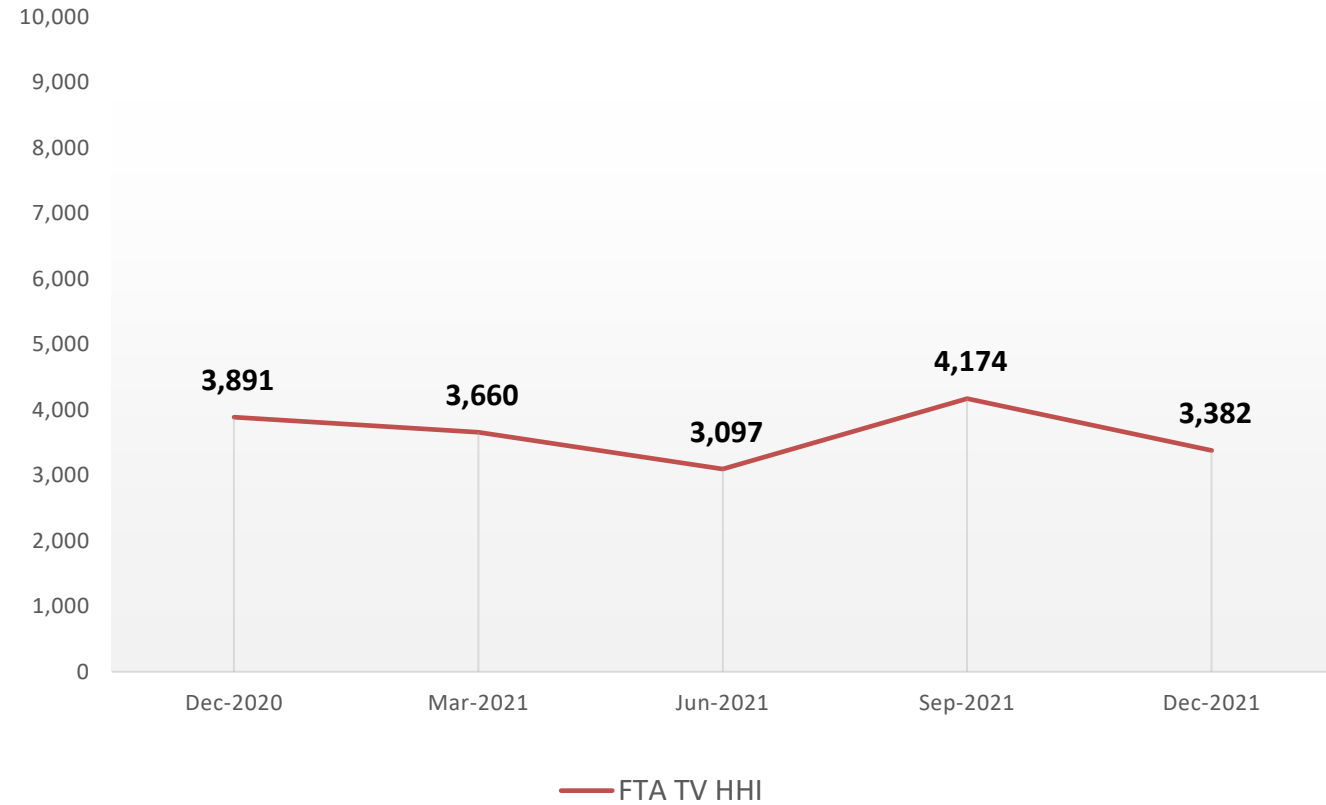
# Free-to-Air TV HHI

HHI  
**3,382**

Y-o-Y  
PERCENT  
CHANGE  
**-13.1%**

Q-o-Q  
PERCENT  
CHANGE  
**-19%**

HHI for Free to Air TV Services  
Q4 2020 to Q4 2021



# QUARTERLY MARKET UPDATE

October to December 2021

