

# QUARTERLY MARKET UPDATE

January to March 2022  
*Republished*



## Quarterly Market Update – Q1 2022 (Republished)

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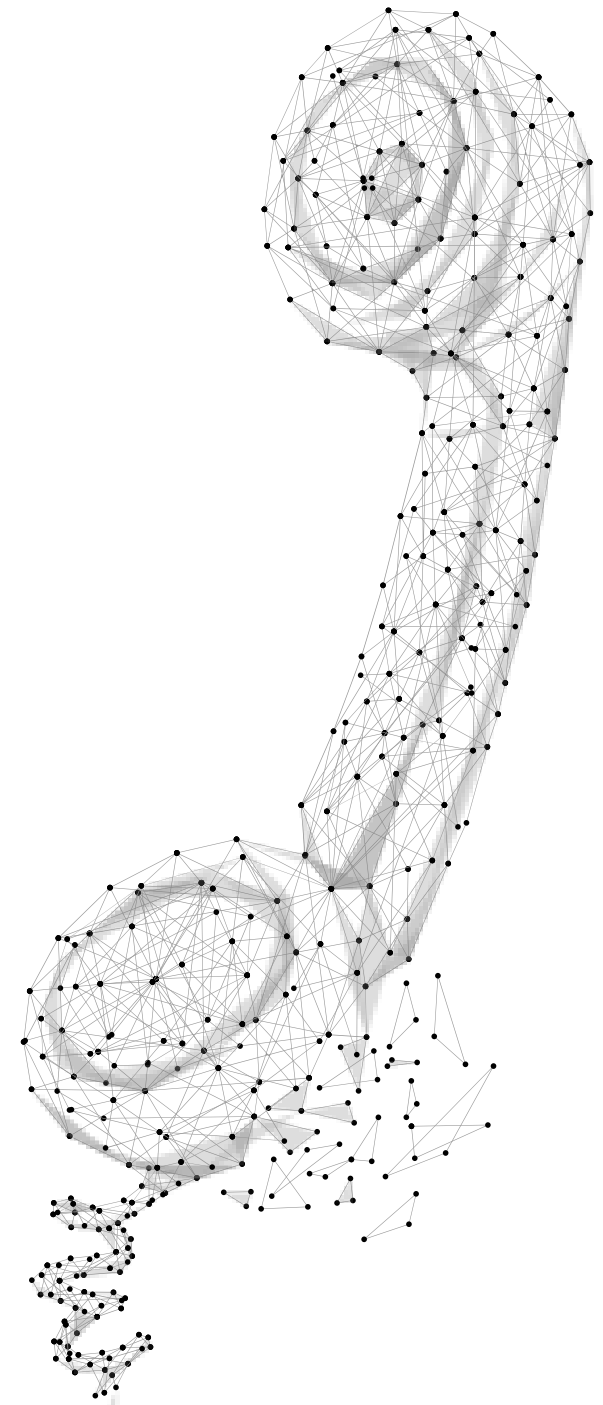
# Notes

- 1. The first version of the quarterly market update for January to March 2022 has been amended based on revised data submitted by some concessionaires as of December 2022.**
  
- 2. Fixed Internet Market includes fixed wired and fixed wireless Internet.**
  
- 3. 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

1/6/2023

TATT: 2/10/1/3  
TATT: 2/10/1/3



# Fixed Voice Subscriptions



**TOTAL NUMBER OF SUBSCRIPTIONS**

**338,000**



**Y-o-Y PERCENT CHANGE**

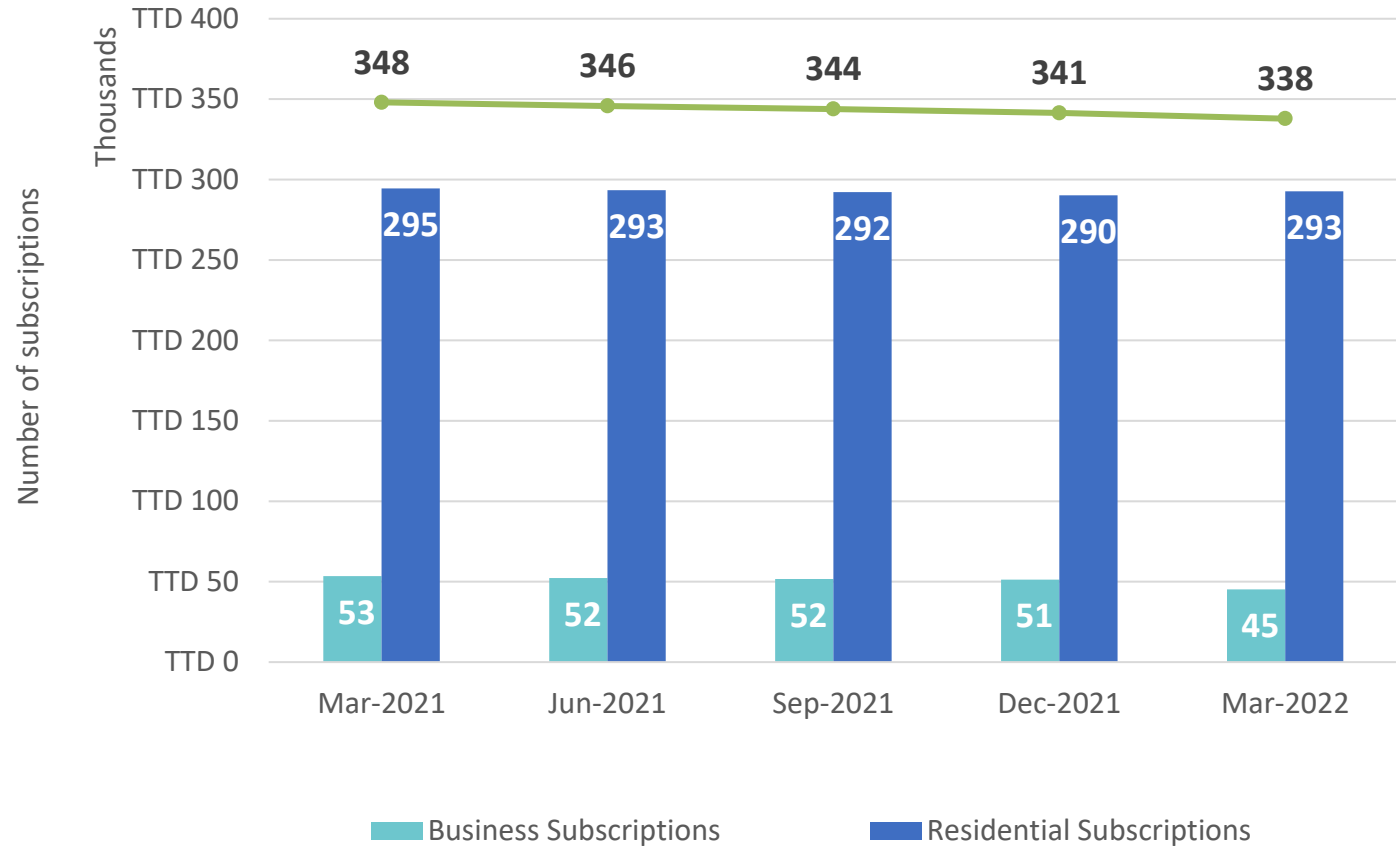
**-2.9%**



**Q-o-Q PERCENT CHANGE**

**-0.9%**

Number of Fixed Line Subscriptions  
Q1 2021 to Q1 2022



# Fixed Voice Penetration



**FIXED VOICE  
PENETRATION PER  
100 INHABITANTS**

**25**



**Y-o-Y  
PERCENT  
CHANGE**

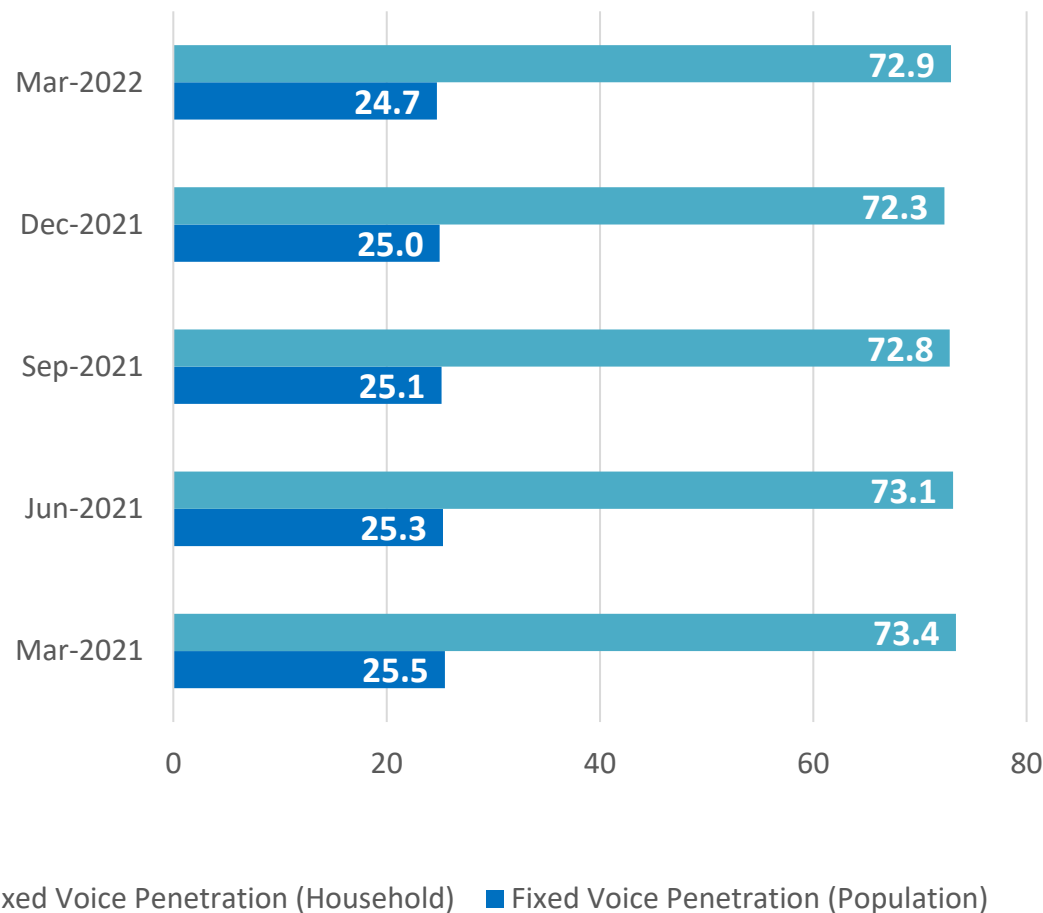
**-3.1%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.2%**

Penetration Rate of Fixed Line Subscriptions  
from Q1 2021 to Q1 2022



**FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS**

**73**



**Y-o-Y  
PERCENT  
CHANGE**

**-0.7%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.8%**

# Fixed Voice Revenues



**GROSS REVENUES**

**\$83.8m**



**Y-o-Y PERCENT CHANGE**

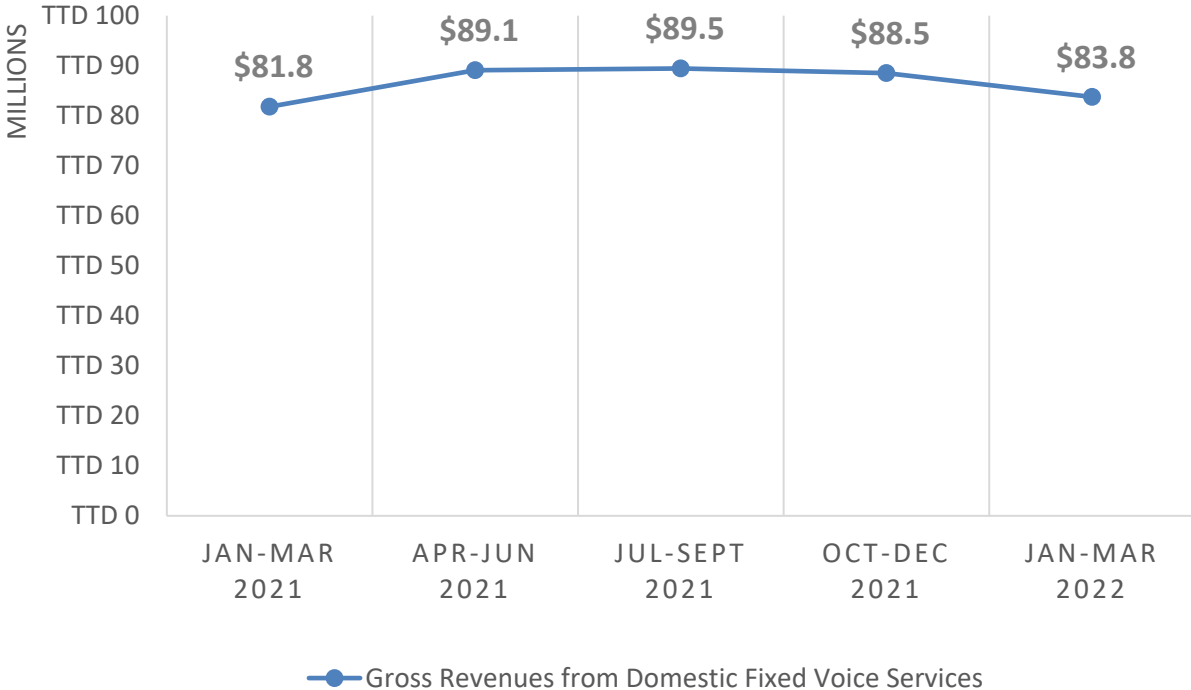
**2.5%**



**Q-o-Q PERCENT CHANGE**

**-5.3%**

**GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q1 2021 TO Q1 2022**





# Fixed Voice HHI



HHI

3,435



Y-o-Y  
PERCENT  
CHANGE

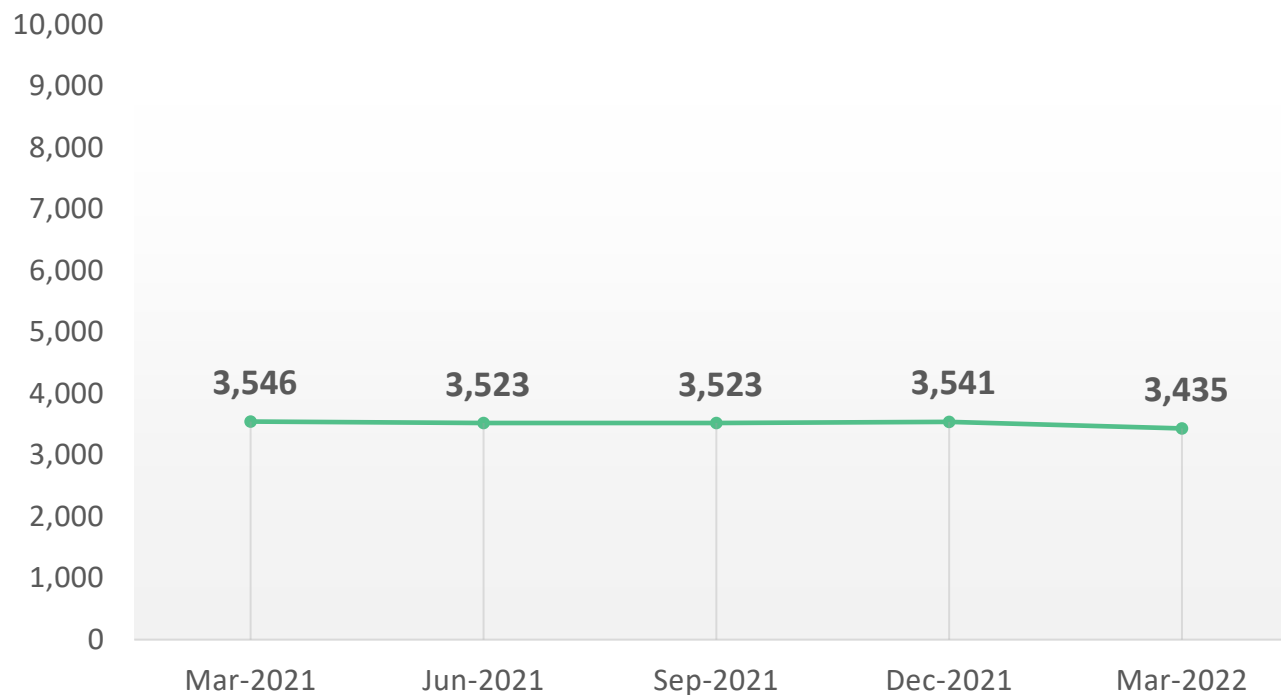
-3.1%



Q-o-Q  
PERCENT  
CHANGE

-3.0%

HHI for Domestic Fixed Line  
from Q1 2021 to Q1 2022



# Fixed Voice Average Revenue Per User



ARPU  
**\$247**

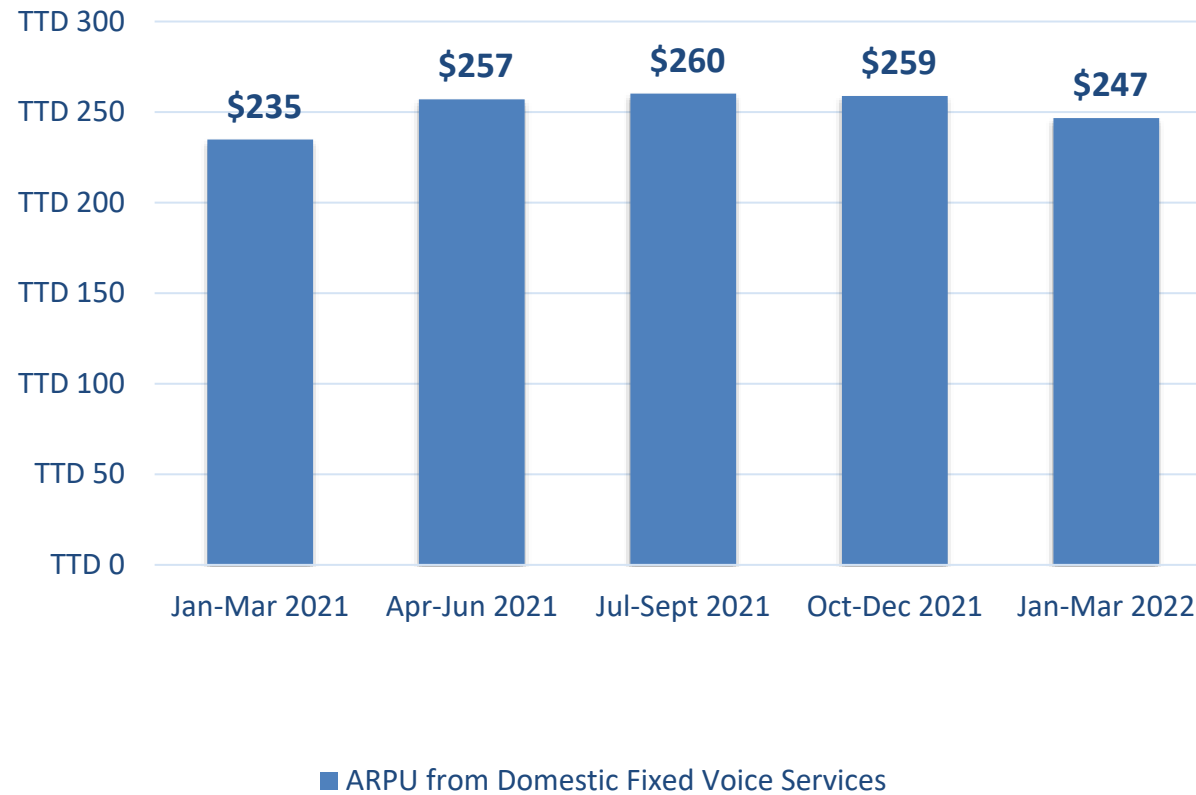


Y-o-Y  
PERCENT  
CHANGE  
**5.1%**



Q-o-Q  
PERCENT  
CHANGE  
**4.6%**

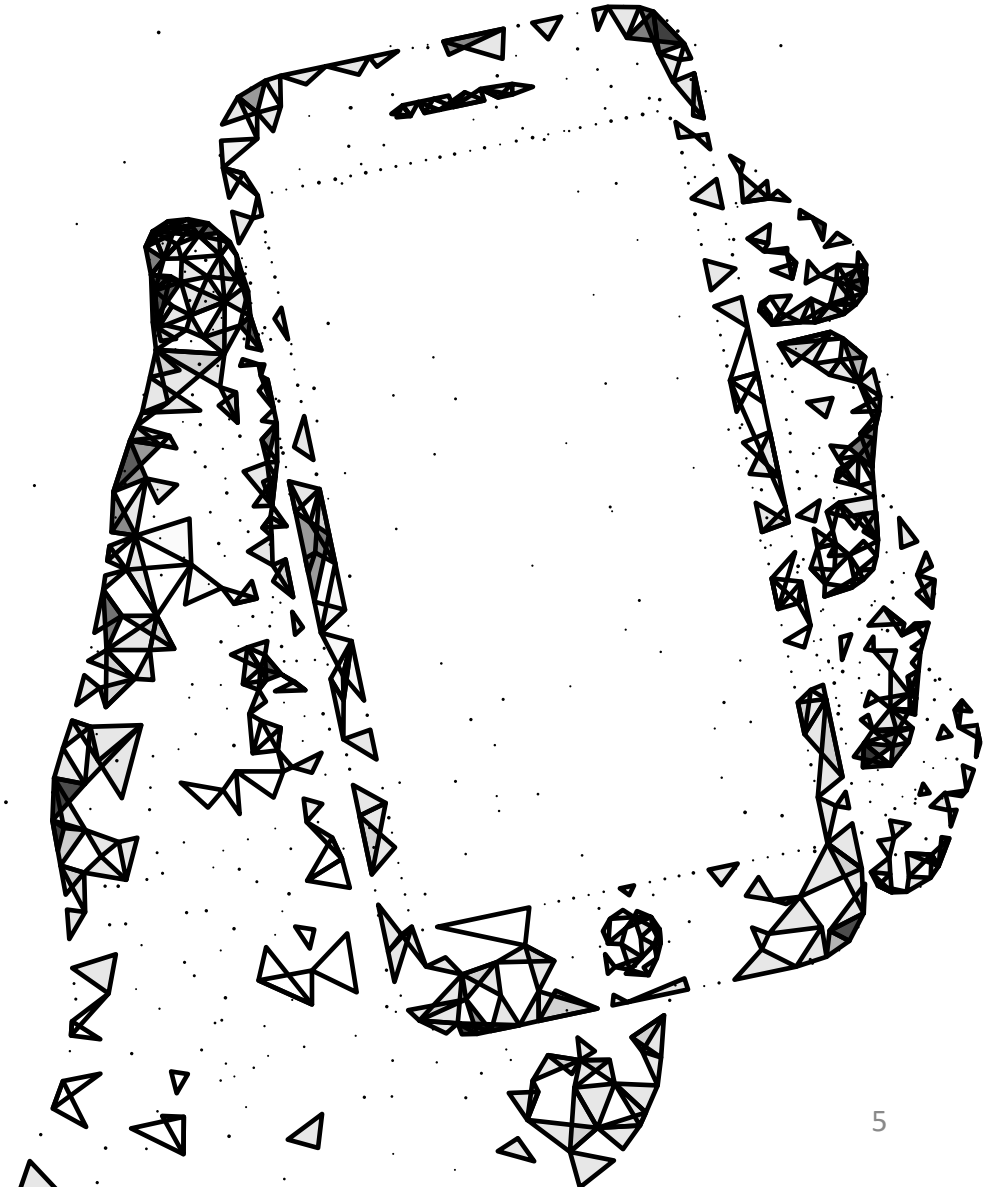
ARPU from Domestic Fixed Voice Services  
from Q1 2021 to Q1 2022



# Mobile Voice

1/6/2023

TATT: 2/10/1/3  
TATT: 2/10/1/3



# Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,969,000



Y-o-Y PERCENT CHANGE

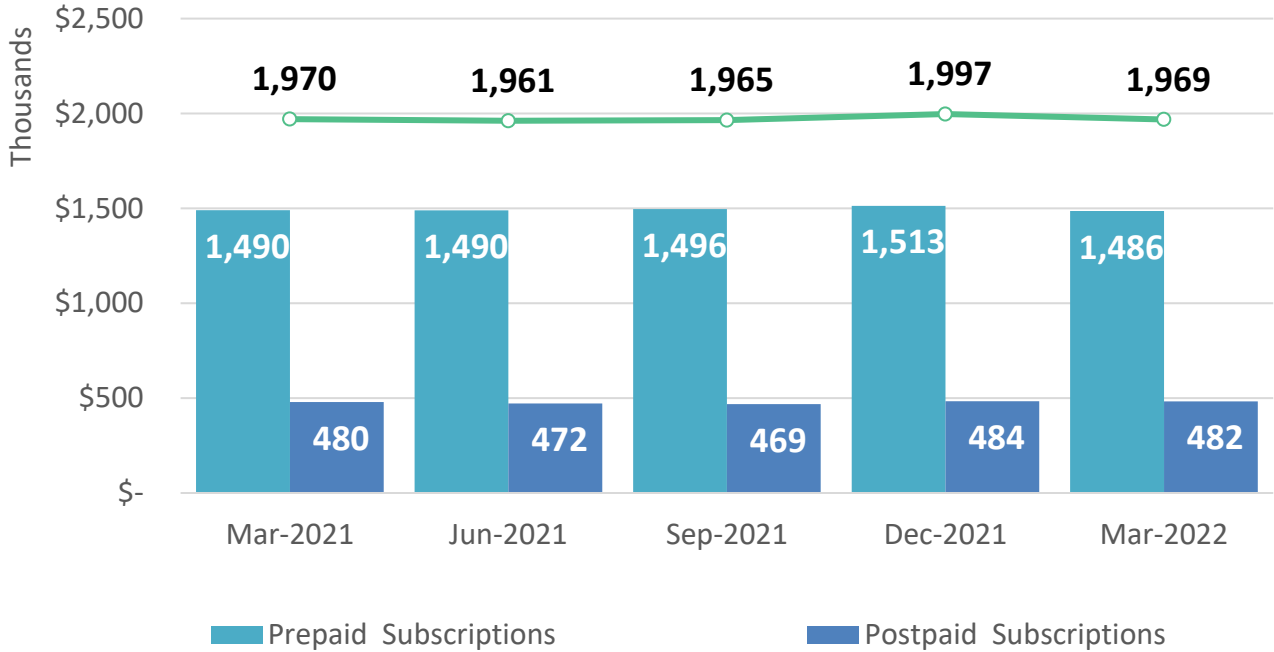
-0.1%



Q-o-Q PERCENT CHANGE

-1.4%

Number of Mobile Voice Subscriptions from Q1 2021 to Q1 2022



# Mobile Voice Penetration



**MOBILE VOICE  
PENETRATION  
PER 100  
INHABITANTS**

**144**

**Y-o-Y  
PERCENT  
CHANGE**

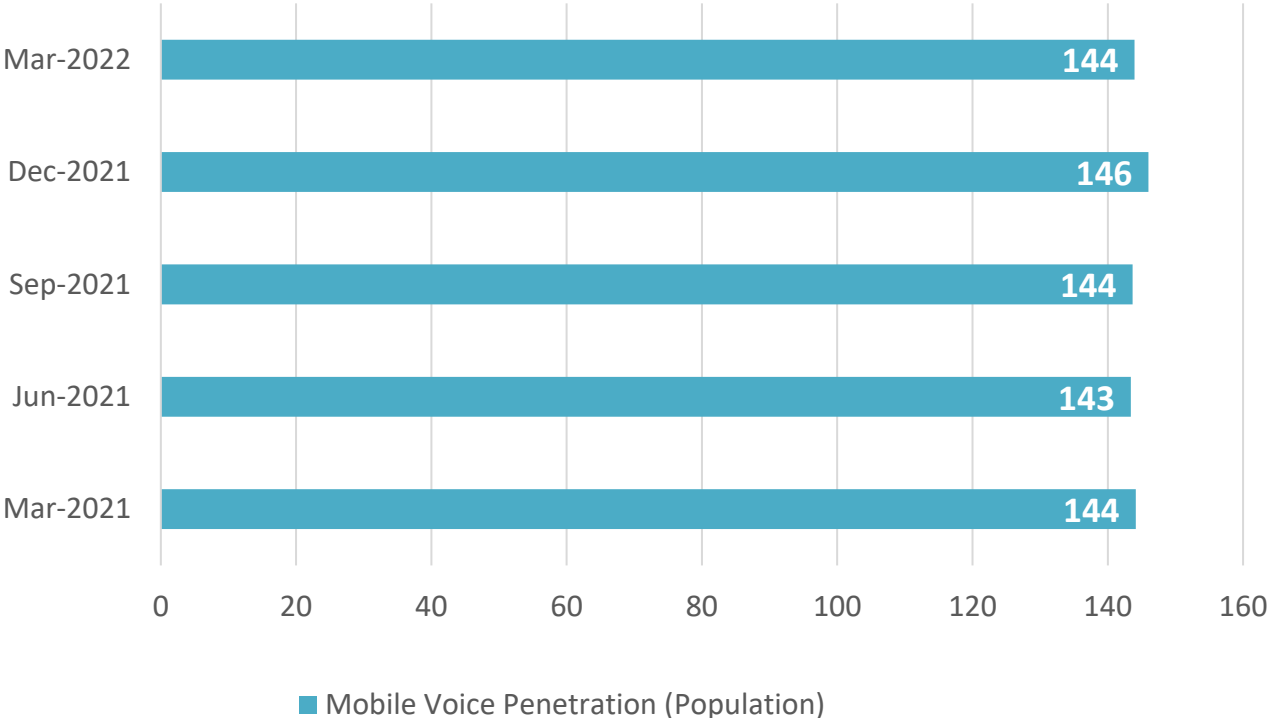
**0%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.4%**

Penetration of Mobile Voice Subscriptions  
from Q1 2021 to Q1 2022



# Mobile Services Revenues



**GROSS REVENUES**

**\$ 482m**



**Y-o-Y PERCENT CHANGE**

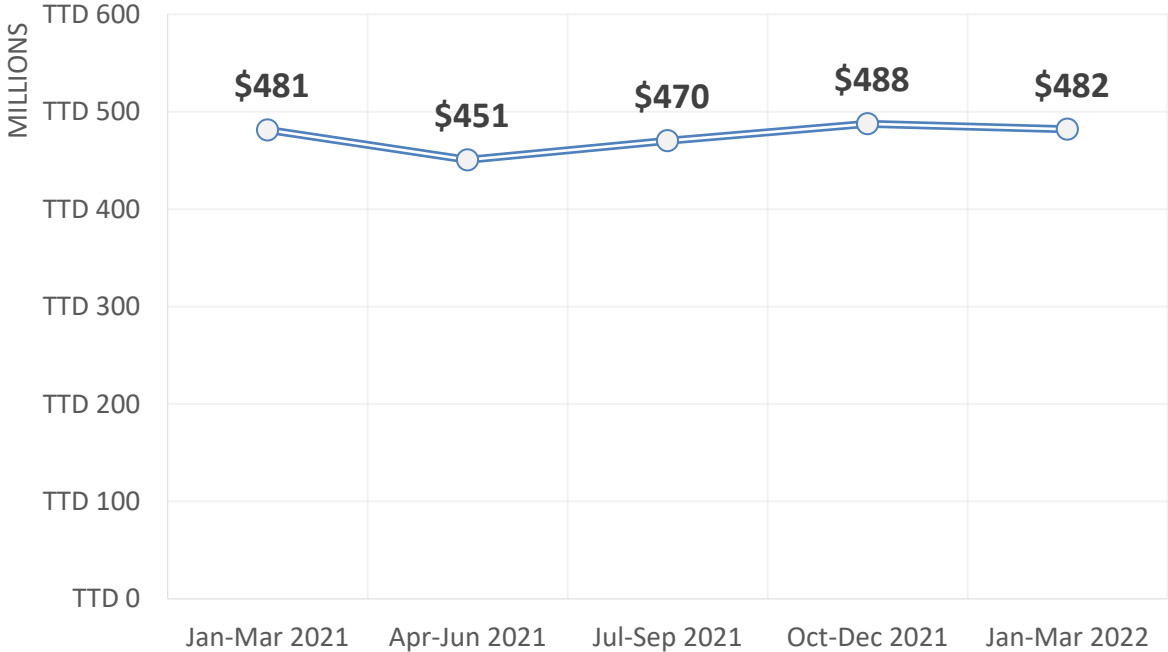
**0.2%**



**Q-o-Q PERCENT CHANGE**

**-1.2%**

**TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$)  
FROM Q1 2021 TO Q1 2022**



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

*Includes revenues from Mobile voice and Internet services.*

# Mobile Voice HHI



HHI

5,177



Y-o-Y  
PERCENT  
CHANGE

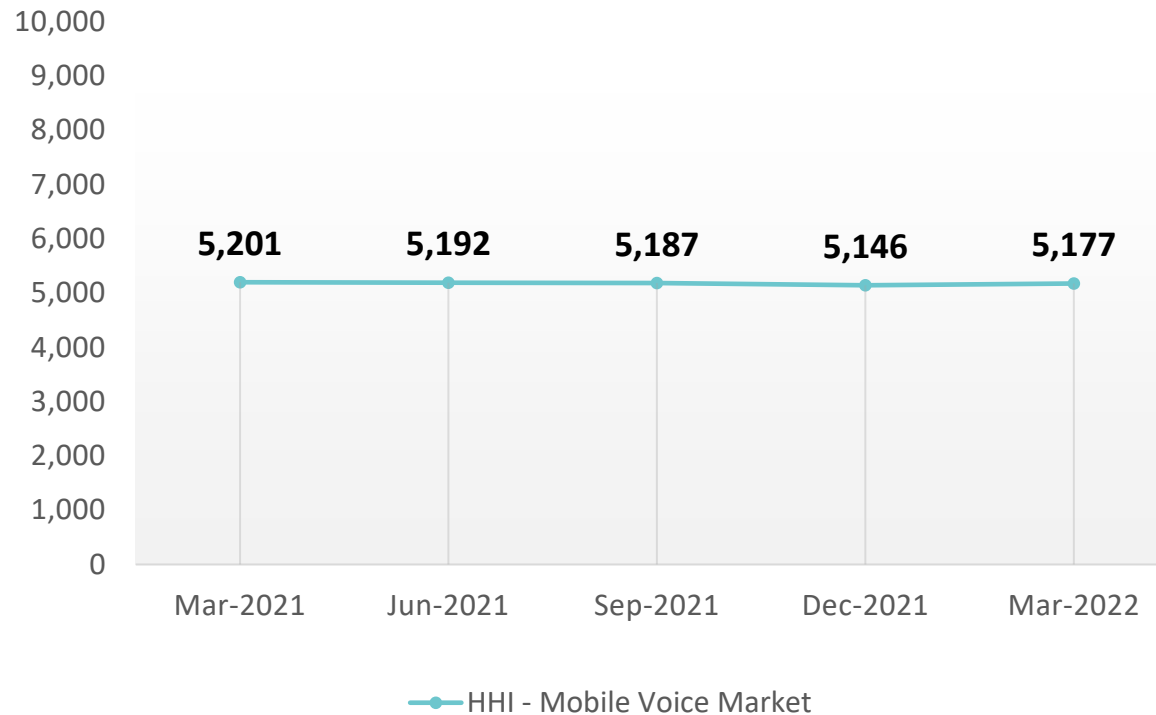
-0.5%



Q-o-Q  
PERCENT  
CHANGE

0.6%

HHI for Domestic Mobile Services  
from Q1 2021 to Q1 2022



# Average Revenue Per User

## Mobile Services



ARPU  
**\$243**

Y-o-Y  
PERCENT  
CHANGE

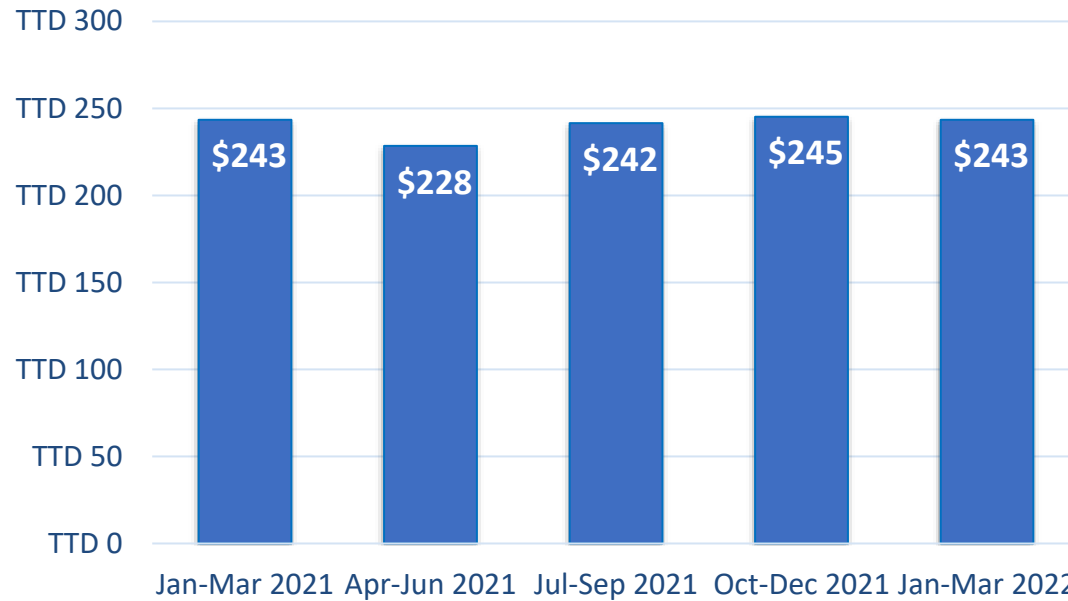
**0%**



Q-o-Q  
PERCENT  
CHANGE

**-0.8%**

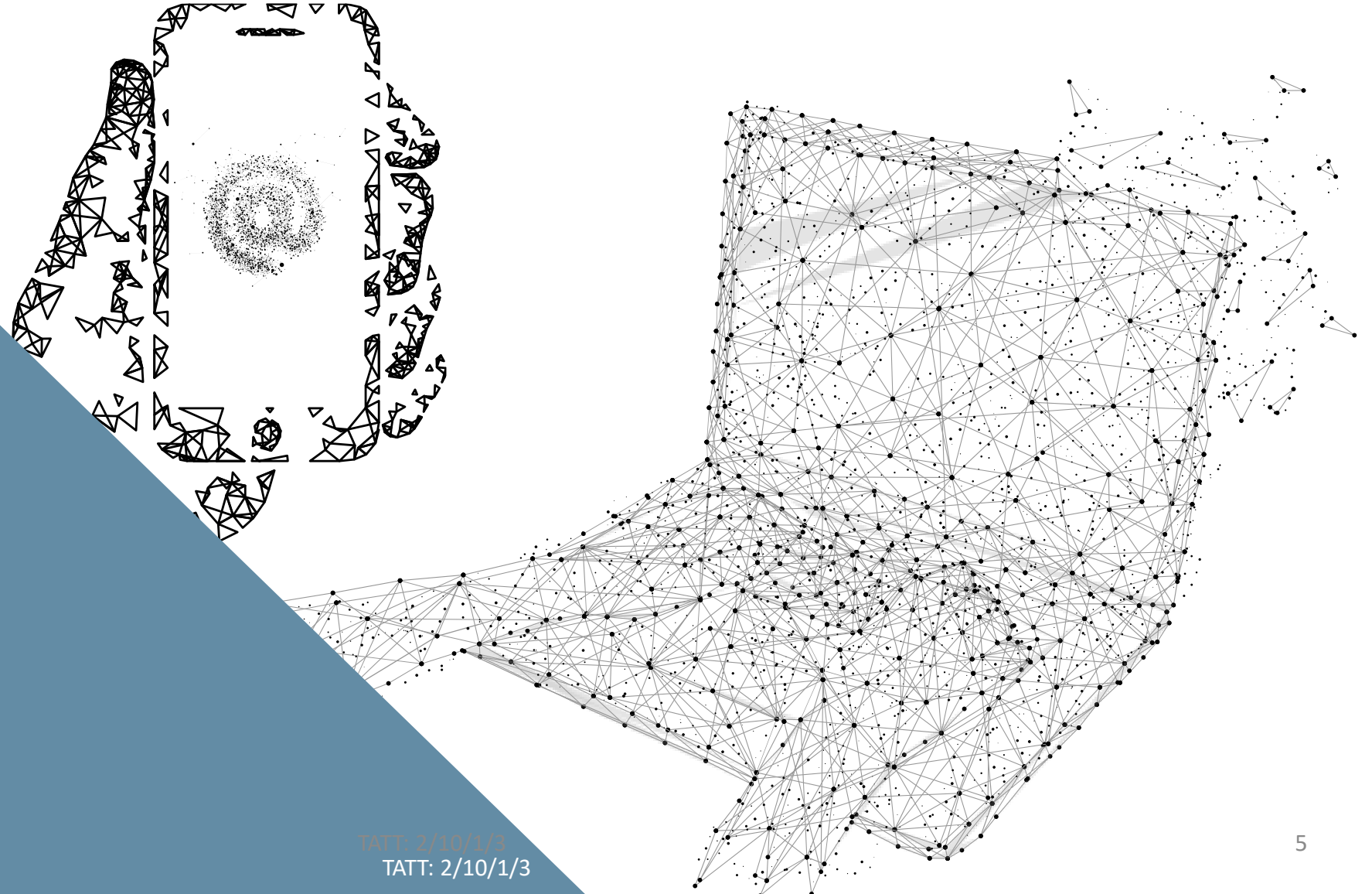
ARPU for Domestic Mobile Services  
from Q1 2021 to Q1 2022



■ ARPU - Mobile services



# Internet



# Fixed Broadband Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

379,600



Y-o-Y PERCENT CHANGE

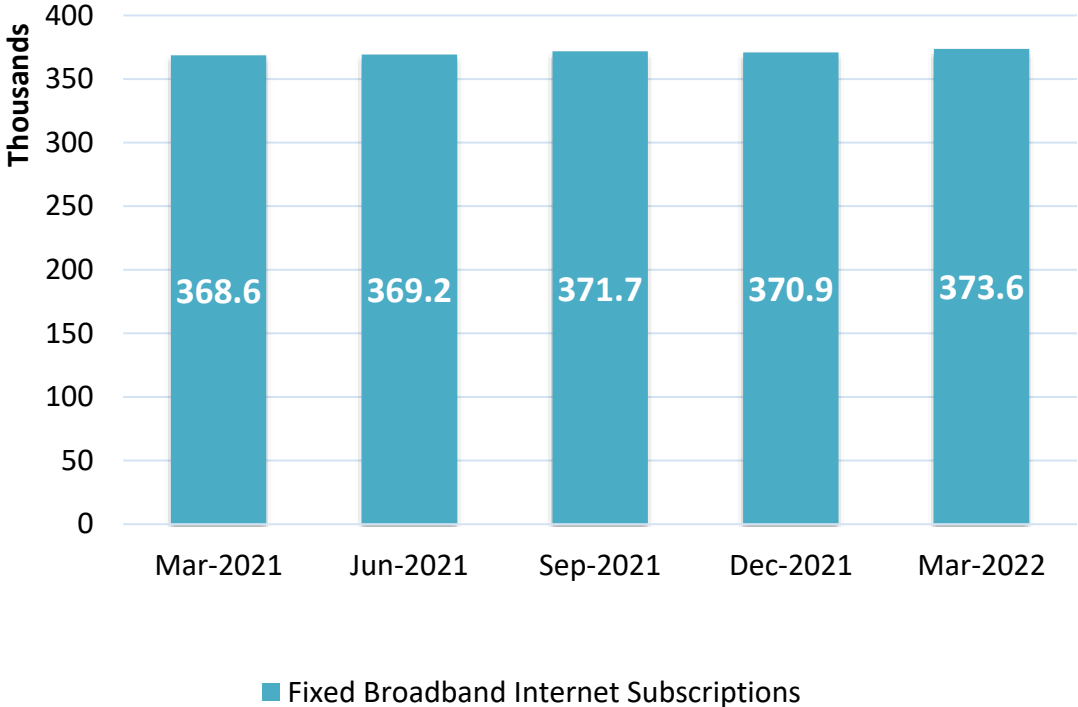
1.4%



Q-o-Q PERCENT CHANGE

0.7%

Number of Fixed Broadband Internet Subscriptions from Q1 2021 to Q1 2022



\* Data estimated for the following concessionaire who had not submitted data at the date of publication: Greendot Limited

# Fixed Internet Penetration



**FIXED INTERNET  
PENETRATION  
PER 100  
INHABITANTS**

**27**



**Y-o-Y  
PERCENT  
CHANGE**

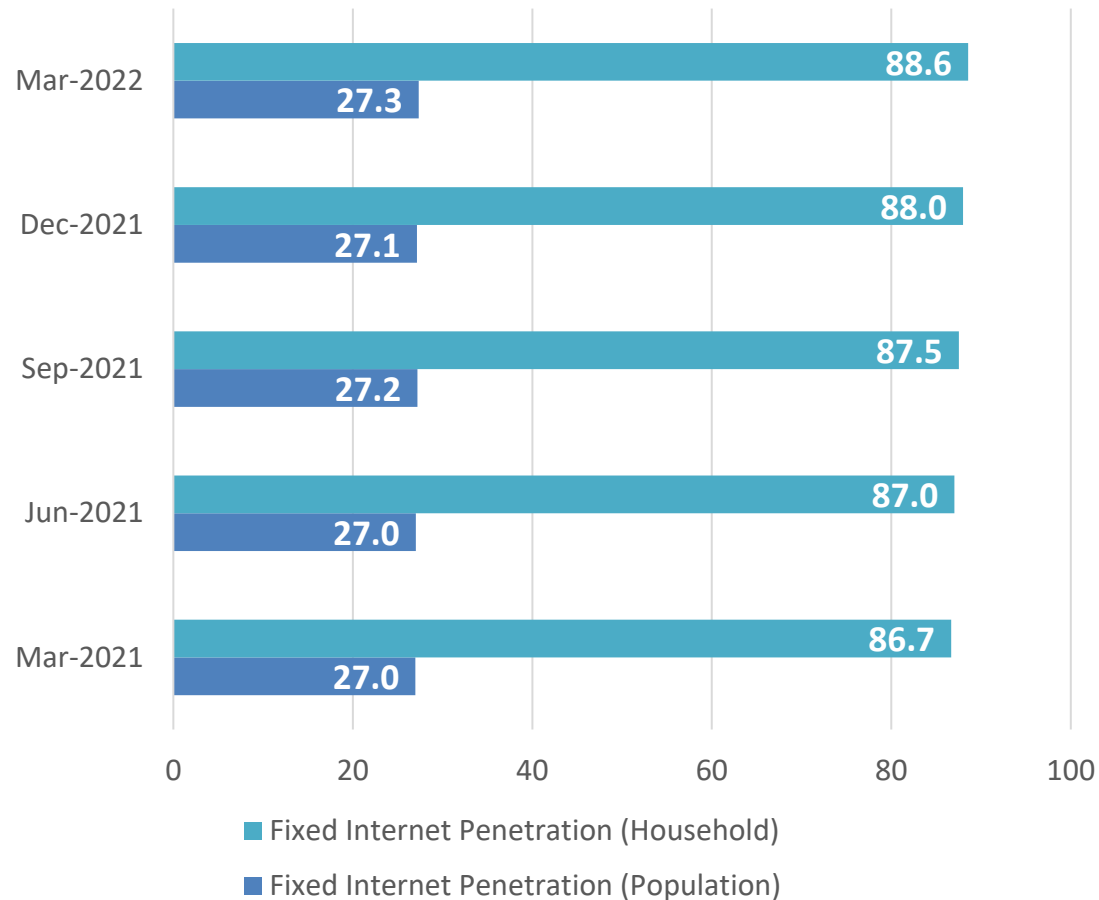
**1.1%**



**Q-o-Q  
PERCENT  
CHANGE**

**0.7%**

Penetration for Fixed Internet Subscriptions  
from Q1 2021 to Q1 2022



**FIXED INTERNET  
PENETRATION  
PER 100  
HOUSEHOLDS**

**89**



**Y-O-Y  
PERCENT  
CHANGE**

**2.2%**



**Q-O-Q  
PERCENT  
CHANGE**

**0.7%**

*\* Data estimated for the following concessionaire who had not submitted data at the date of publication: Greendot Limited*

# Mobile Internet Penetration



**MOBILE INTERNET  
PENETRATION PER  
100 INHABITANTS**

**56**



**Y-o-Y  
PERCENT  
CHANGE**

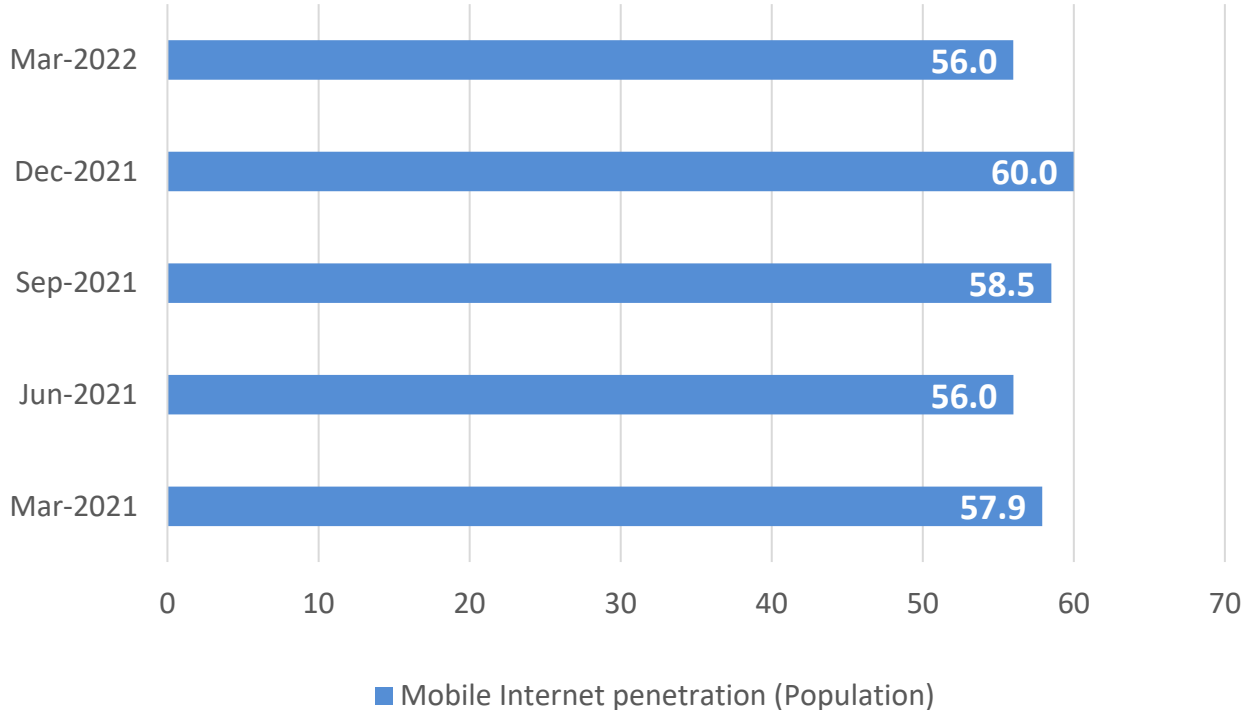
**-3.3%**



**Q-o-Q  
PERCENT  
CHANGE**

**-6.7%**

Penetration for Mobile Internet Subscriptions  
from Q1 2021 to Q1 2022



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

# Fixed Internet Revenues



**GROSS REVENUES**  
**\$ 314.7m**

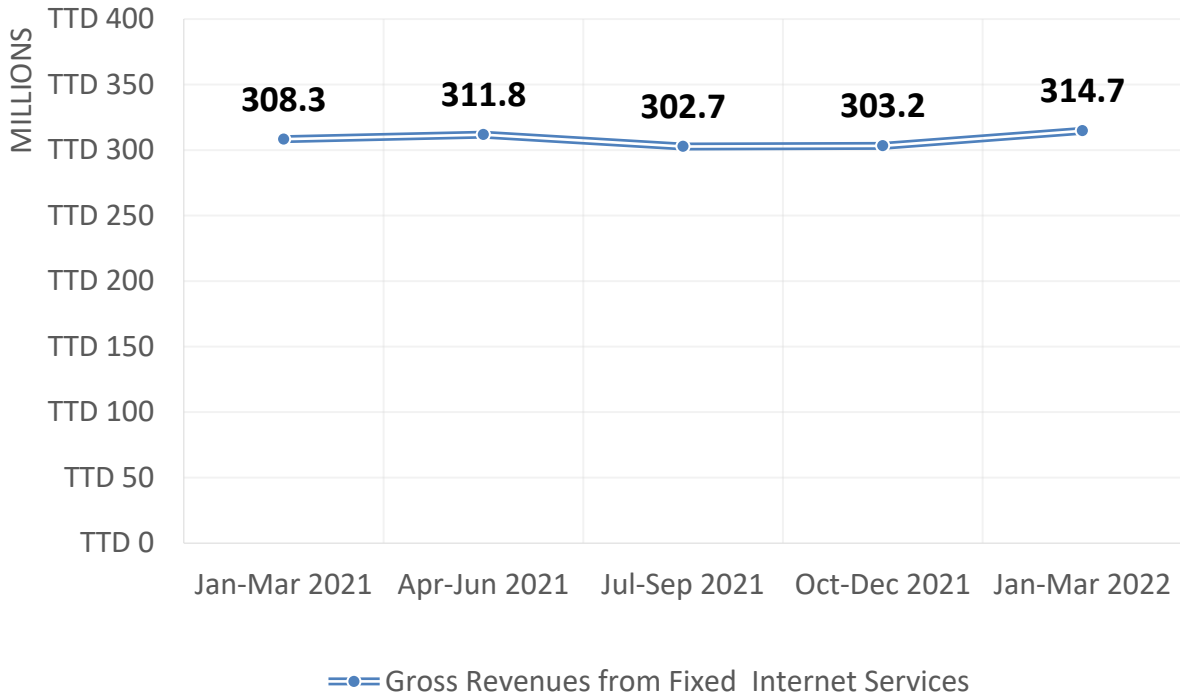


**Y-o-Y PERCENT CHANGE**  
**2.1%**



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

**GROSS REVENUES FROM FIXED INTERNET SERVICES FROM Q1 2021 TO Q1 2022**



*\* Data estimated for the following concessionaire who had not submitted data at the date of publication: Greendot Limited*

# Fixed Internet HHI



HHI  
**2,885**



Y-o-Y  
PERCENT  
CHANGE

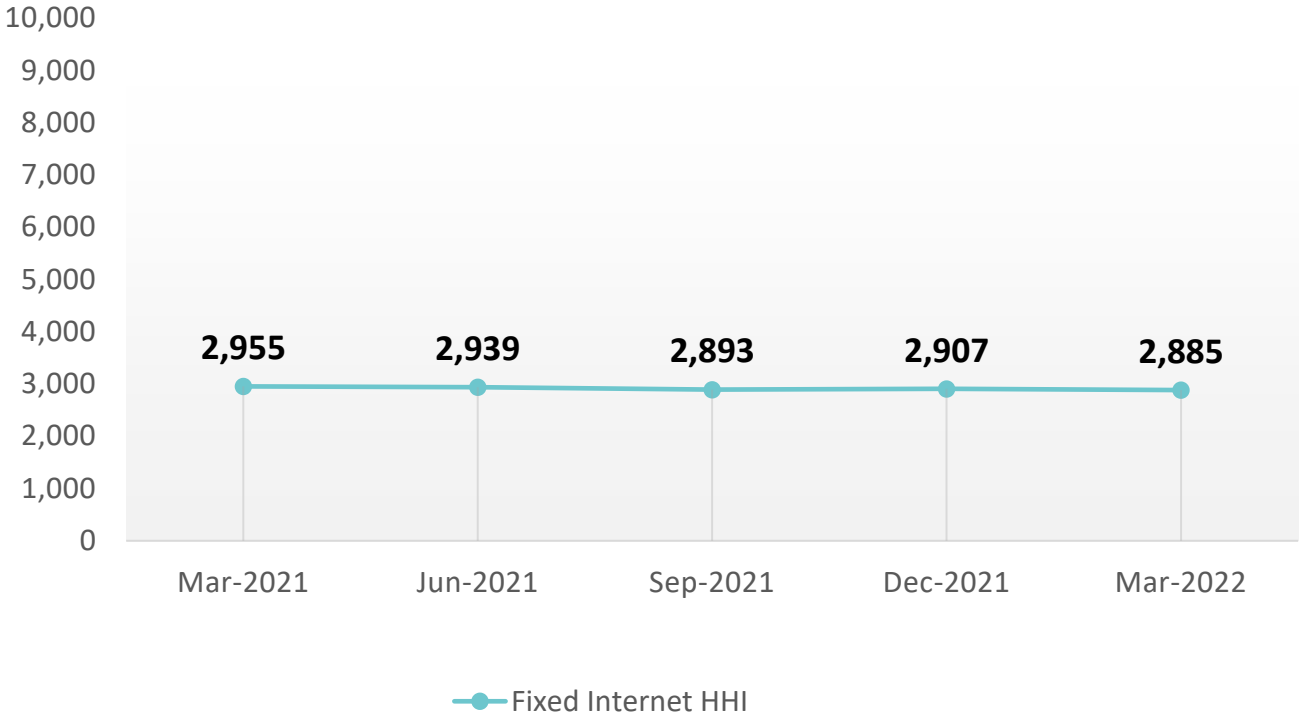
**-2.4%**



Q-o-Q  
PERCENT  
CHANGE

**-0.8%**

HHI for Fixed Internet Services  
from Q1 2021 to Q1 2022



\* Data estimated for the following concessionaire who had not submitted data at the date of publication: Greendot Limited

# Fixed Internet Average Revenue Per User



ARPU  
**\$845**

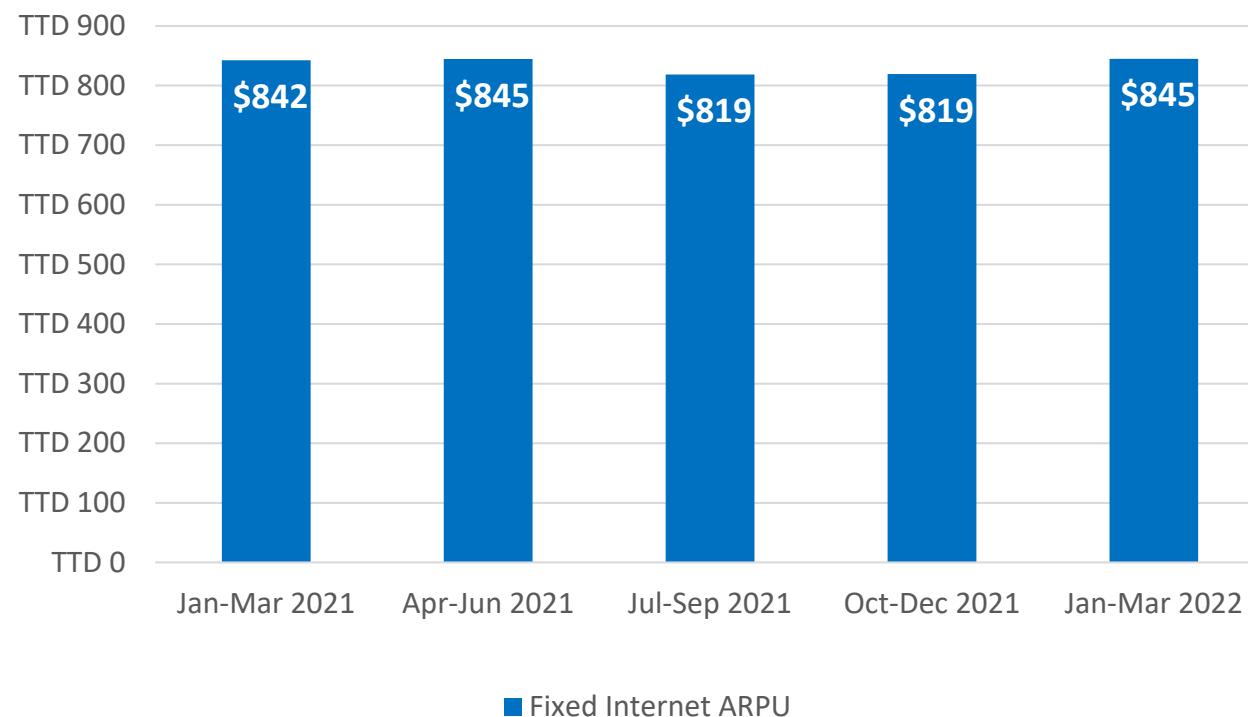


Y-o-Y  
PERCENT  
CHANGE  
**0.4%**



Q-o-Q  
PERCENT  
CHANGE  
**3.2%**

ARPU for Fixed Internet Services  
from Q1 2021 to Q1 2022



*\* Data estimated for the following concessionaire who had not submitted data at the date of publication: Greendot Limited*

# Pay TV





# Pay TV Subscriptions



TOTAL NUMBER  
OF  
SUBSCRIPTIONS

**233,000**



Y-o-Y  
PERCENT  
CHANGE

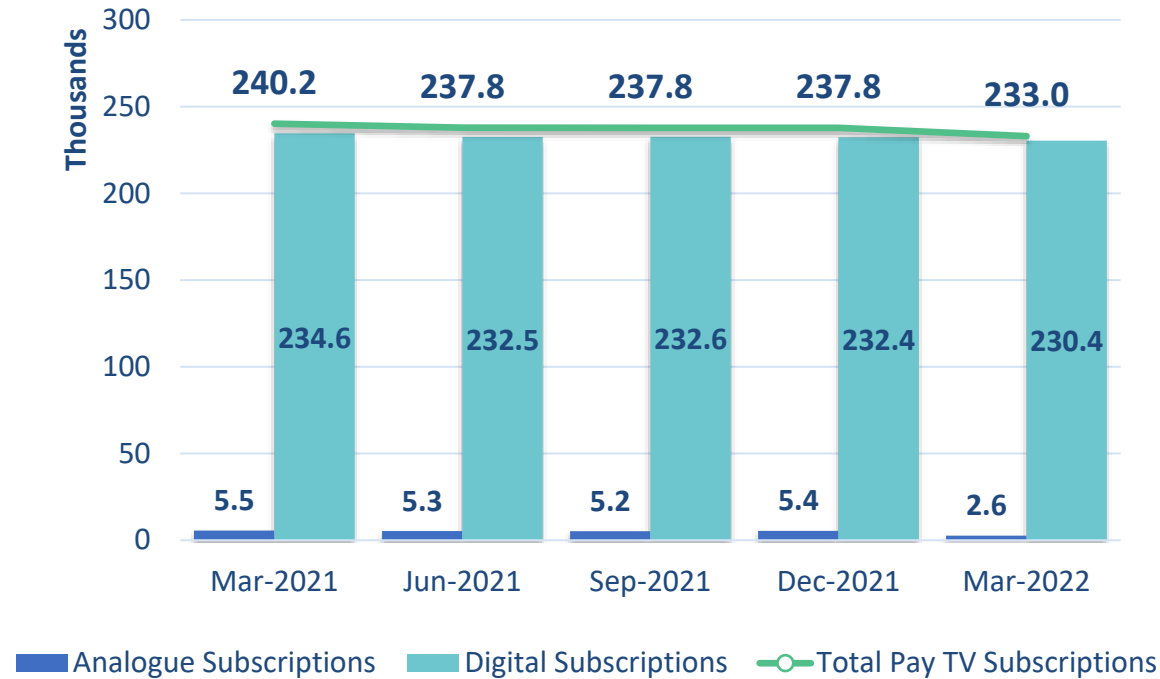
**-3.0%**



Q-o-Q  
PERCENT  
CHANGE

**-2.0%**

Number of Pay TV Subscriptions  
from Q1 2021 to Q1 2022



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

# Pay TV Penetration



**PAY TV  
PENETRATION  
PER 100  
INHABITANTS**

**16.9**



**Y-o-Y  
PERCENT  
CHANGE**

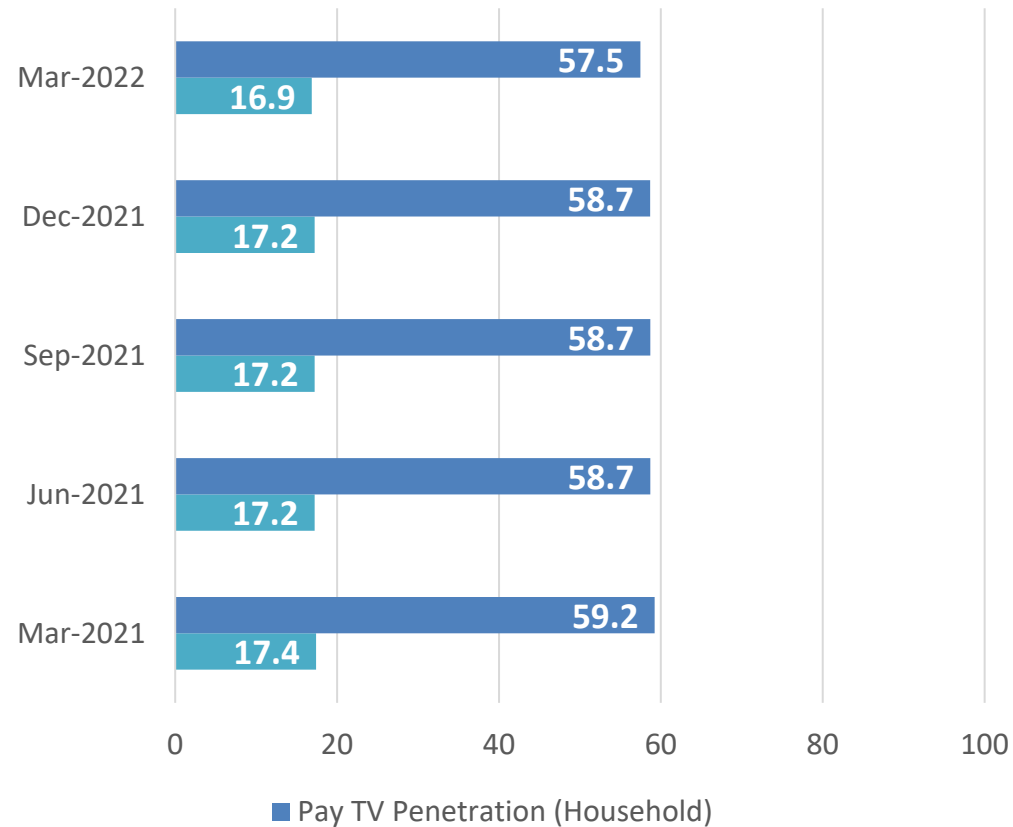
**-2.9%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.7%**

Penetration Rates of Pay TV Services  
from Q1 2021 to Q1 2022



**PAY TV  
PENETRATION  
PER 100  
HOUSEHOLDS**

**57.5**



**Y-O-Y  
PERCENT  
CHANGE**

**-2.9%**

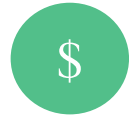


**Q-O-Q  
PERCENT  
CHANGE**

**-2.0%**

*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

# Pay TV Revenues



**GROSS  
REVENUES**

**\$157.4m**



**Y-o-Y  
PERCENT  
CHANGE**

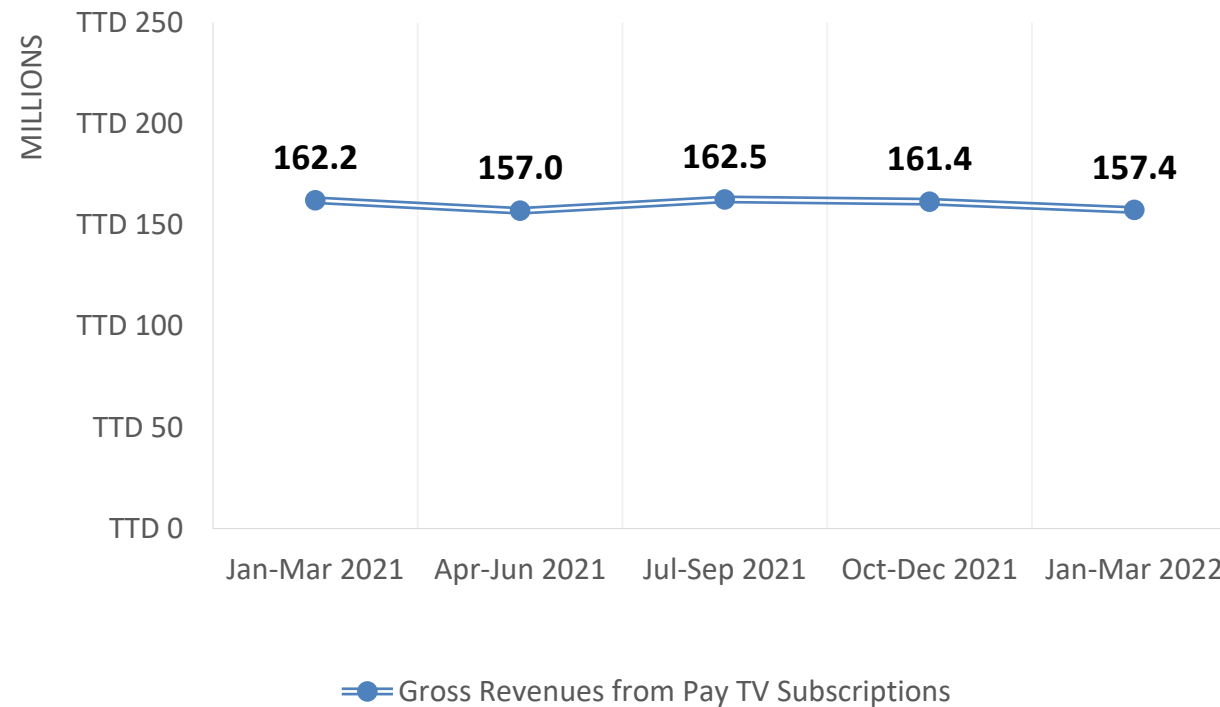
**-3.0%**



**Q-o-Q  
PERCENT  
CHANGE**

**-2.5%**

**GROSS REVENUES FROM PAY TV SERVICES  
FROM Q1 2021 TO Q1 2022**



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

# Pay TV HHI



HHI  
**3,393**



Y-o-Y  
PERCENT  
CHANGE

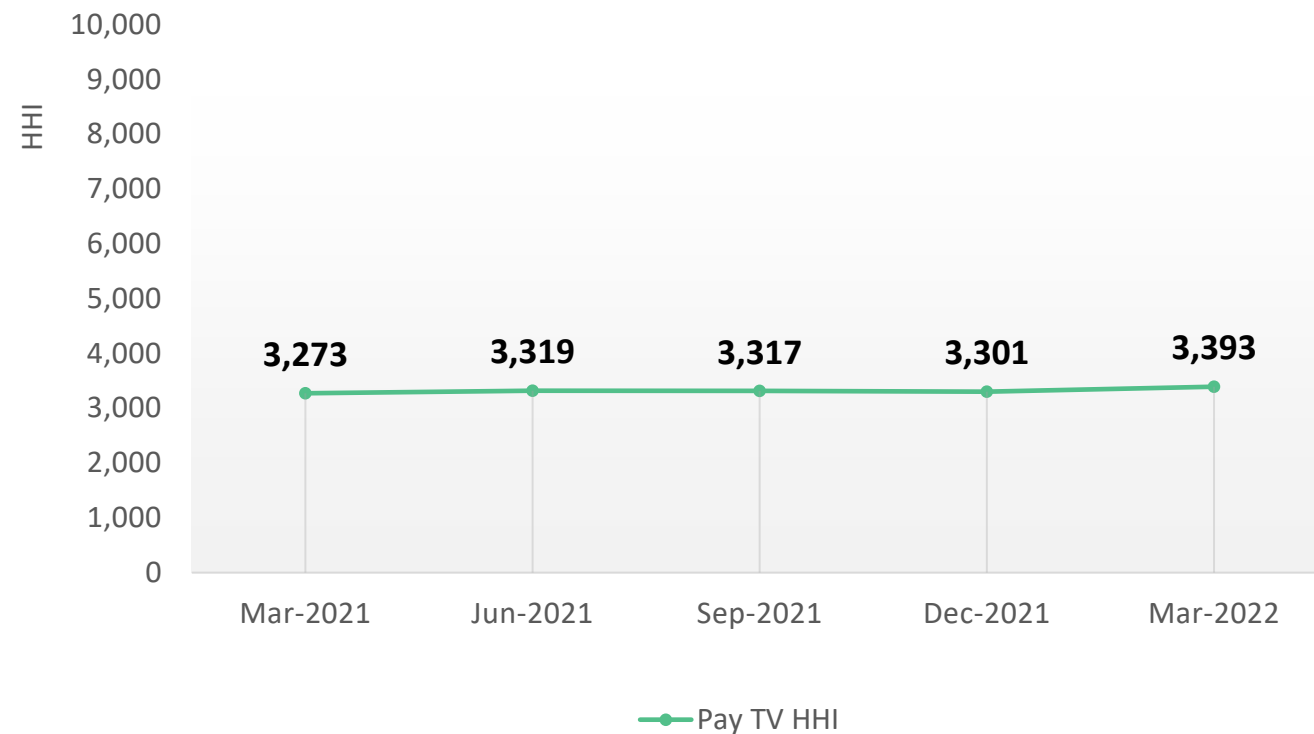
**3.7%**



Q-o-Q  
PERCENT  
CHANGE

**2.9%**

HHI for Pay TV Services  
from Q1 2021 to Q1 2022

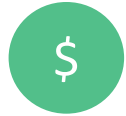


*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

# Pay TV

## Average Revenue Per User

ARPU



**\$674**

Y-o-Y  
PERCENT  
CHANGE



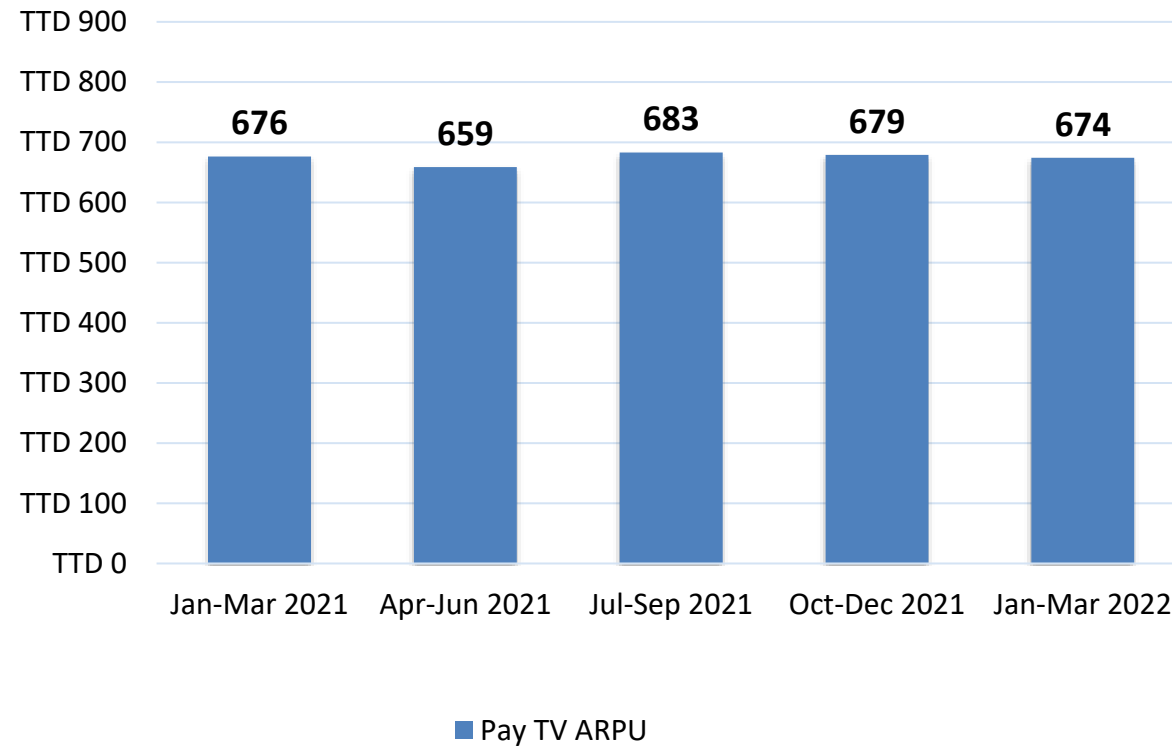
**-0.3%**

Q-o-Q  
PERCENT  
CHANGE



**-0.7%**

ARPU for Pay TV Services  
from Q1 2021 to Q1 2022

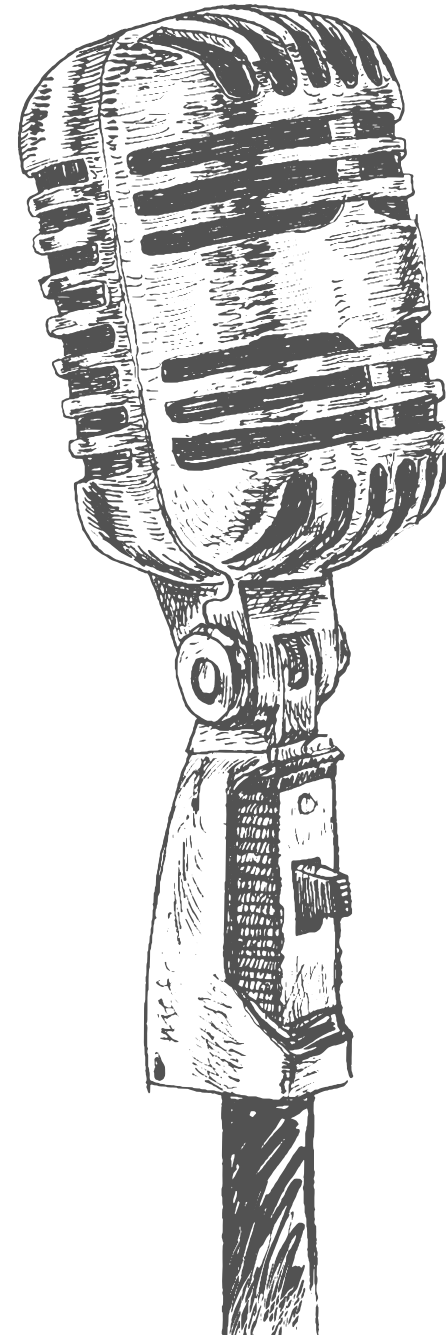


*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

# Free-to-Air Radio

1/6/2023

TATT: 2/10/1/3  
TATT: 2/10/1/3



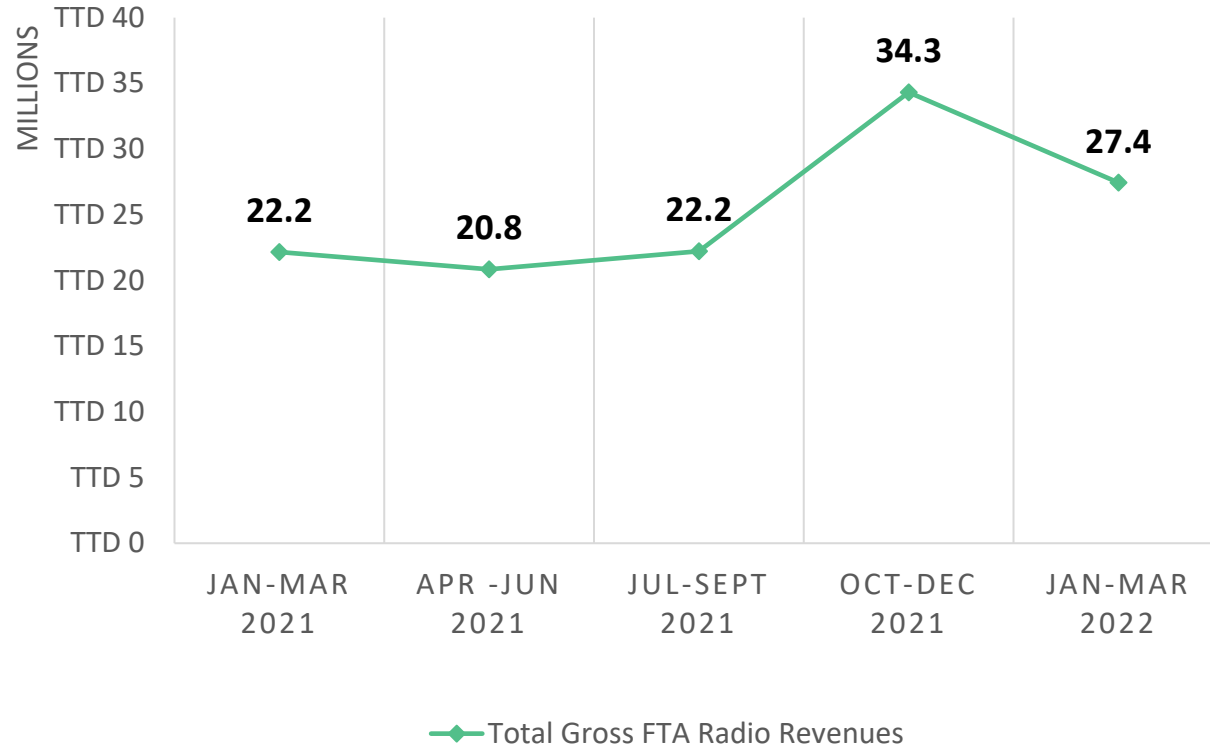
# Free-to-Air Radio Revenues

GROSS REVENUES  
**\$27.4m**

Y-o-Y PERCENT CHANGE  
**23.4%**

Q-o-Q PERCENT CHANGE  
**-20.1%**

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q1 2021 TO Q1 2022



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

# Free-to-Air Radio HHI



HHI  
**554**

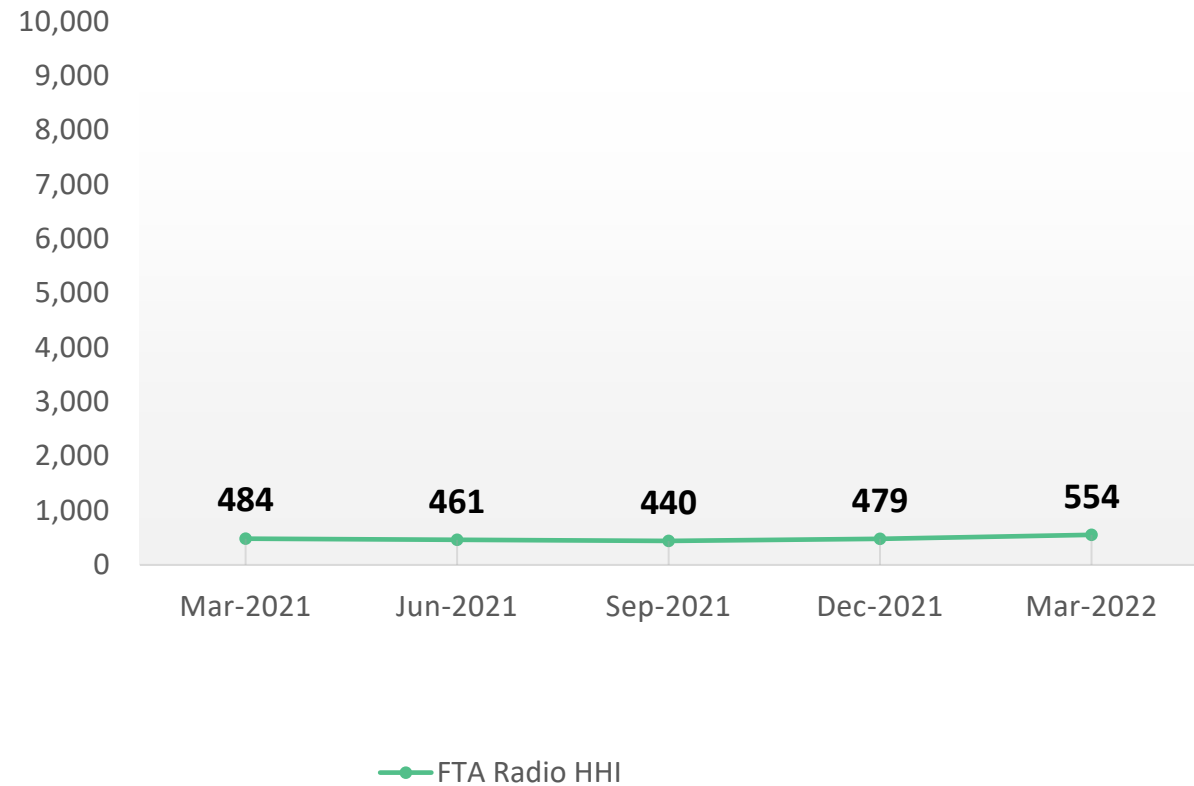


Y-o-Y  
PERCENT  
CHANGE  
**14.5%**



Q-o-Q  
PERCENT  
CHANGE  
**15.7%**

HHI for Free to Air Radio Services  
from Q1 2021 to Q1 2022



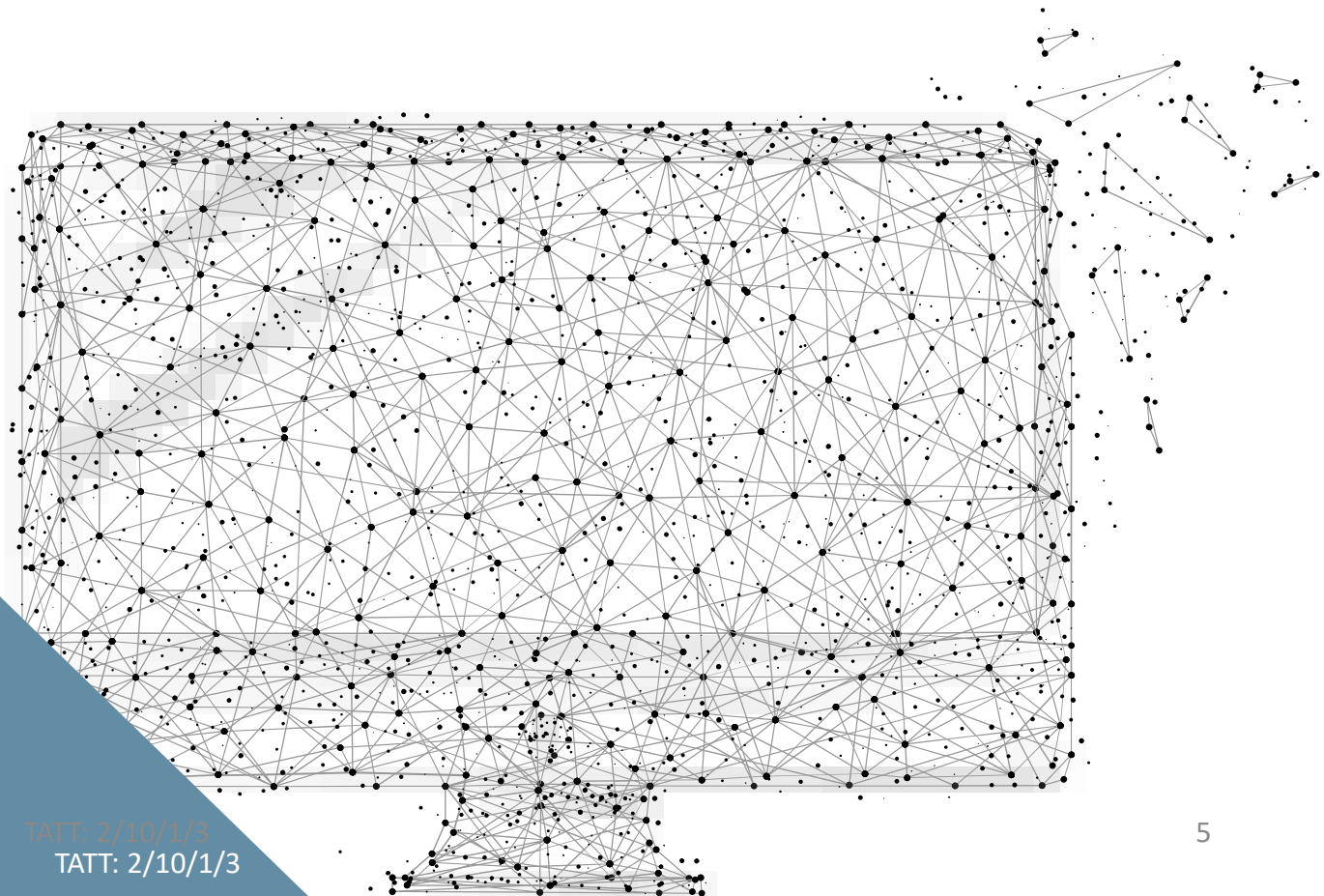
*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca, Trinibashment Limited and Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network and PBCT.*



# Free-to-Air TV

1/6/2023

TATT: 2/10/1/3  
TATT: 2/10/1/3



# Free-to-Air TV Revenues



**GROSS REVENUES**

**\$12.6m**



**Y-o-Y PERCENT CHANGE**

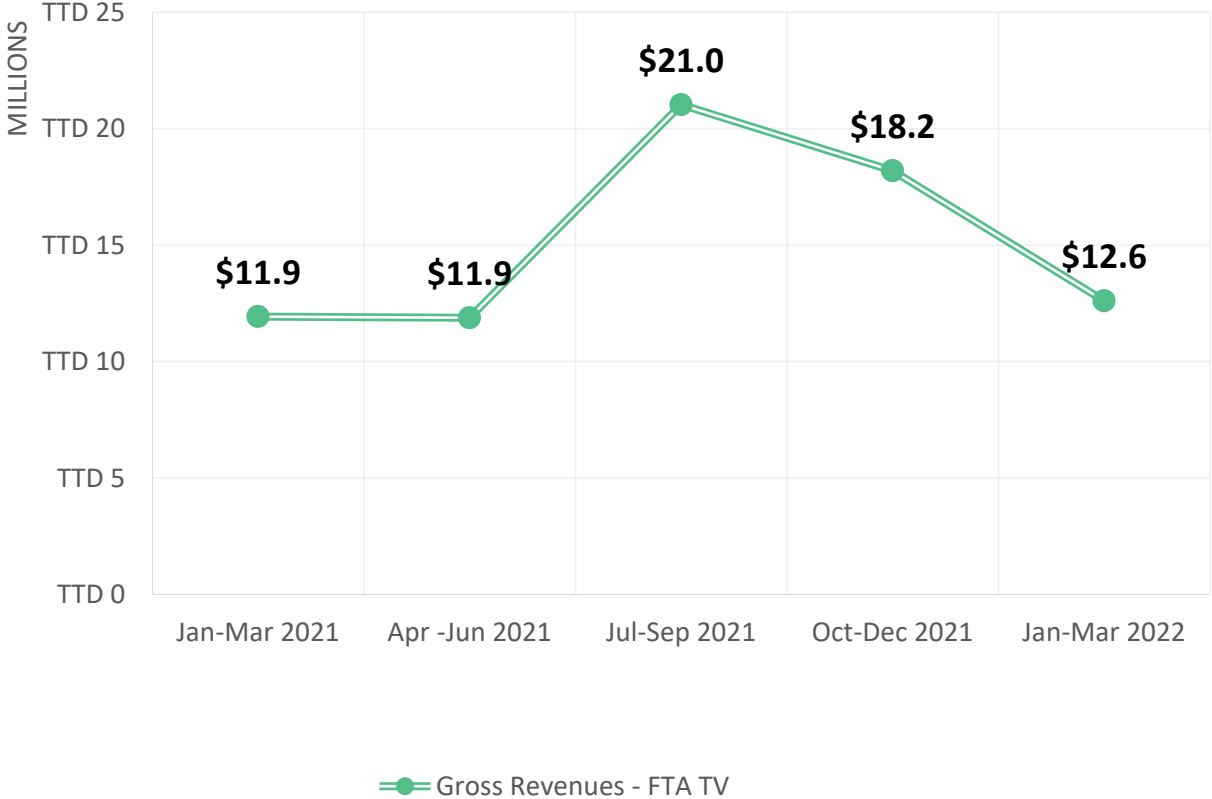
**5.9%**



**Q-o-Q PERCENT CHANGE**

**-30.8%**

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q1 2021 TO Q1 2022



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network*

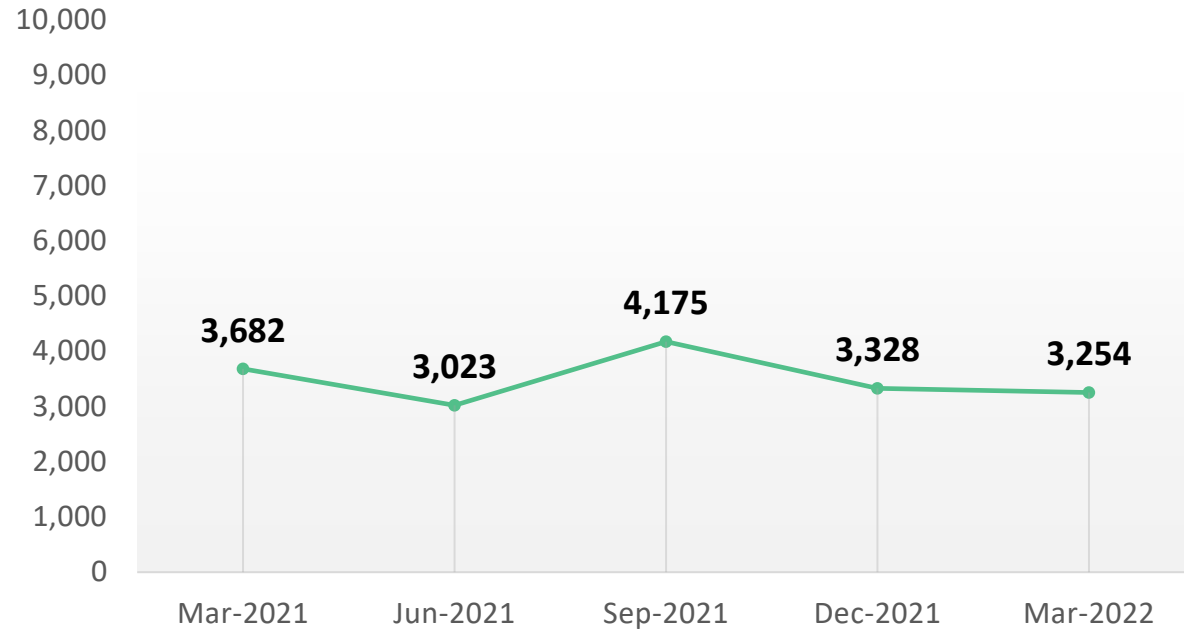
# Free-to-Air TV HHI

HHI  
**3,254**

Y-o-Y  
PERCENT  
CHANGE  
**-11.6%**

Q-o-Q  
PERCENT  
CHANGE  
**-2.2%**

HHI for Free to Air TV Services  
from Q1 2021 to Q1 2022



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication: Advanced Community Network*

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