

QUARTERLY MARKET UPDATE

April to June 2022
Republished



Quarterly Market Update – Q2 2022 (republished)

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Free-to-Air TV Market

Notes

- 1. The first version of the quarterly market update for April to June 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.**

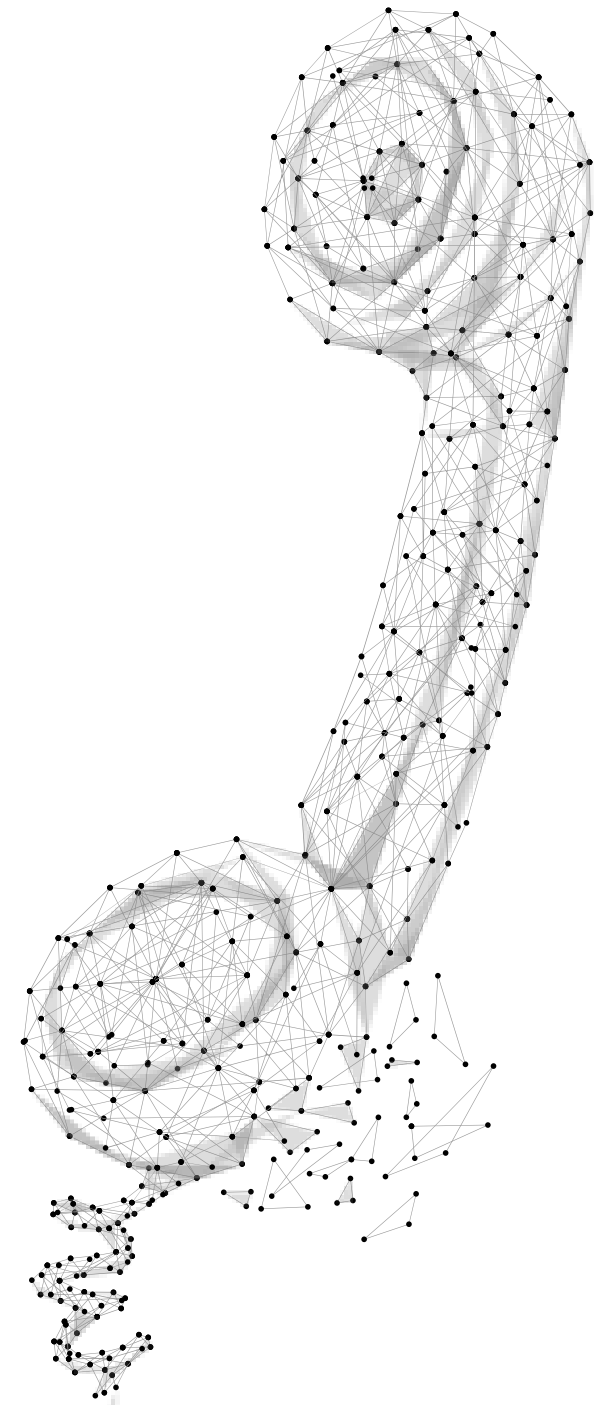
- 3. Penetration rates have been calculated using the following population figures:**
 - a) 1,367,558 (2021 Mid-year population estimate, Central Statistical Office)**

 - 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



Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

333,300



Y-o-Y PERCENT CHANGE

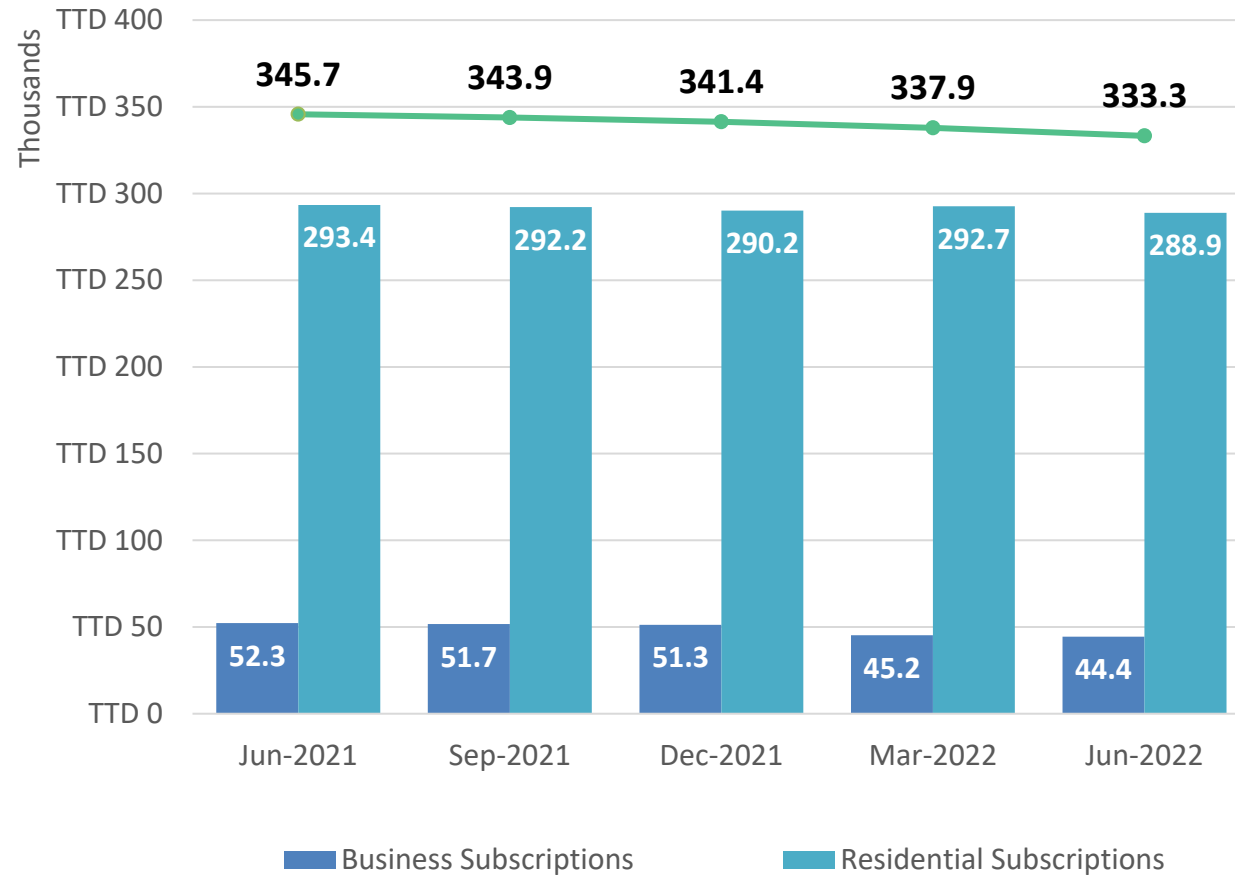
-3.6%



Q-o-Q PERCENT CHANGE

-1.4%

Number of Fixed Line Subscriptions
Q2 2021 to Q2 2022



Fixed Voice Penetration



**FIXED VOICE
PENETRATION PER
100 INHABITANTS**

24



**Y-o-Y
PERCENT
CHANGE**

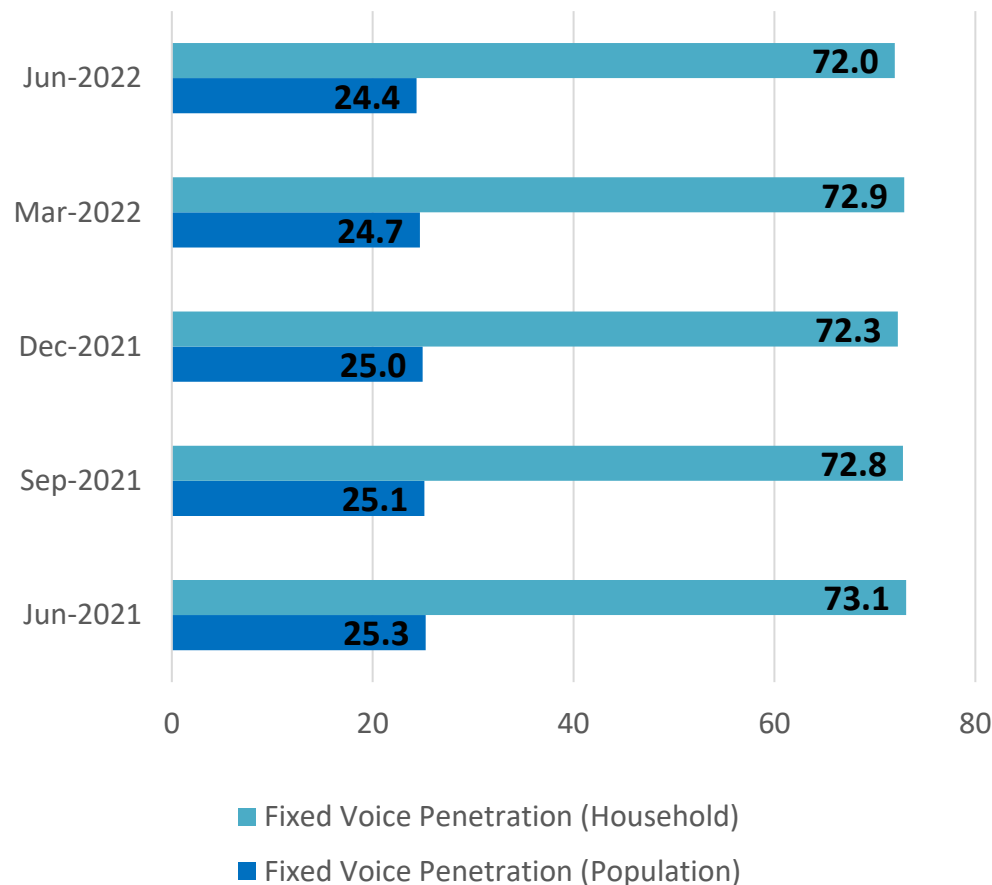
-24.0%



**Q-o-Q
PERCENT
CHANGE**

-3.6%

Penetration Rate of Fixed Line Subscriptions
from Q2 2021 to Q2 2022



**FIXED LINE
PENETRATION PER
100 HOUSEHOLDS**

72



**Y-o-Y
PERCENT
CHANGE**

-1.5%



**Q-o-Q
PERCENT
CHANGE**

-1.2%

Fixed Voice Revenues



**GROSS
REVENUES**

\$78.4m



**Y-o-Y
PERCENT
CHANGE**

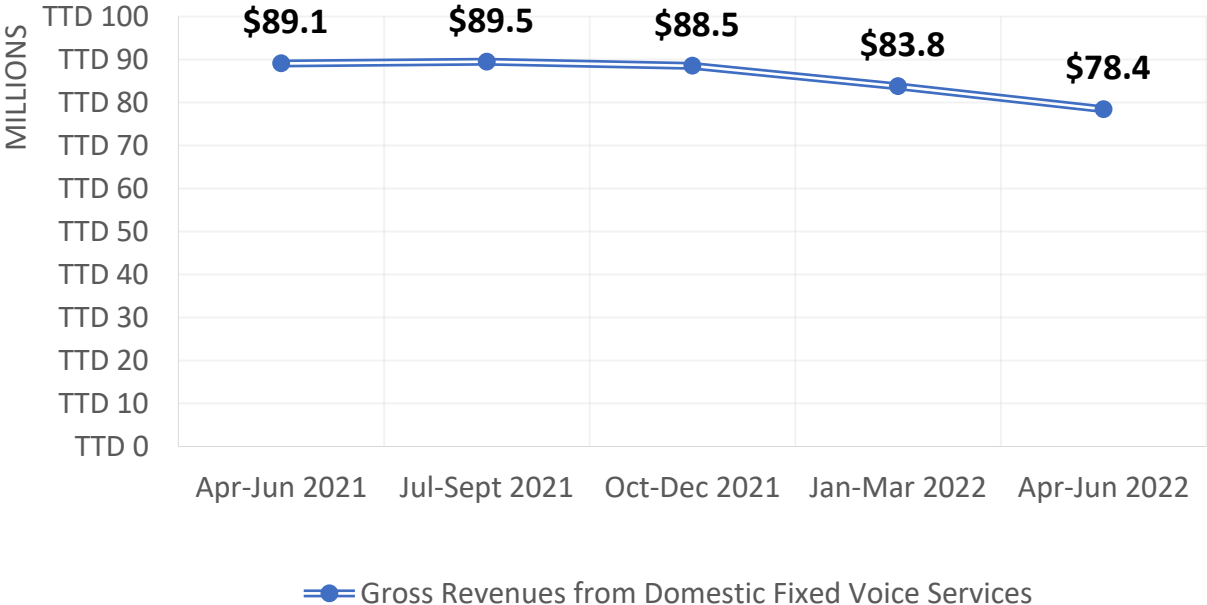
-12.0%



**Q-o-Q
PERCENT
CHANGE**

-6.6%

Gross Revenues from Domestic Fixed Voice Services
from Q2 2021 to Q2 2022



Fixed Voice HHI



HHI

3,437



Y-o-Y
PERCENT
CHANGE

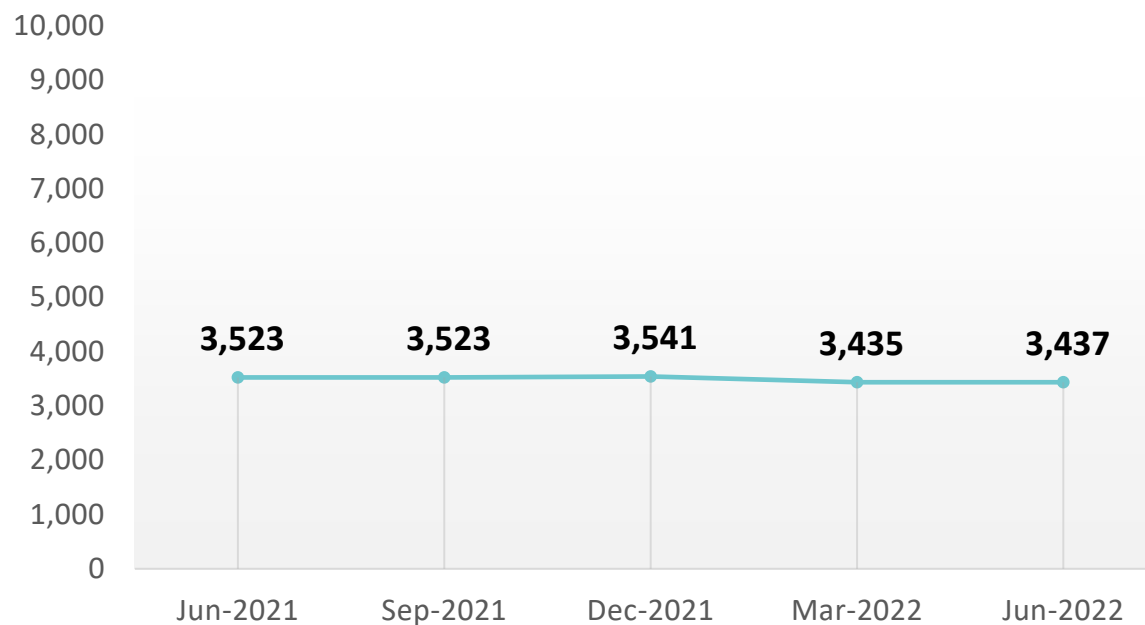
-2.4%



Q-o-Q
PERCENT
CHANGE

-0.6%

HHI for Domestic Fixed Line
from Q2 2021 to Q2 2022



Fixed Voice Average Revenue Per User



ARPU
\$234

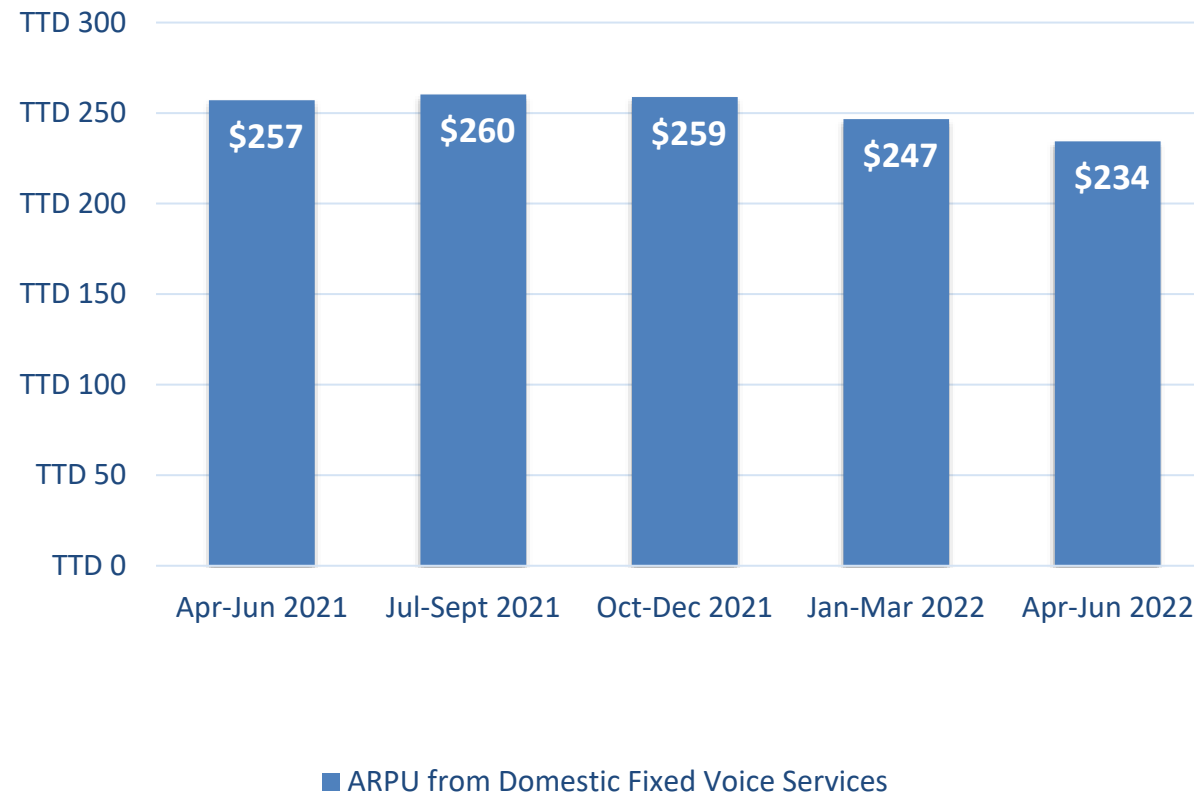


Y-o-Y
PERCENT
CHANGE
-9.0%



Q-o-Q
PERCENT
CHANGE
-5.7%

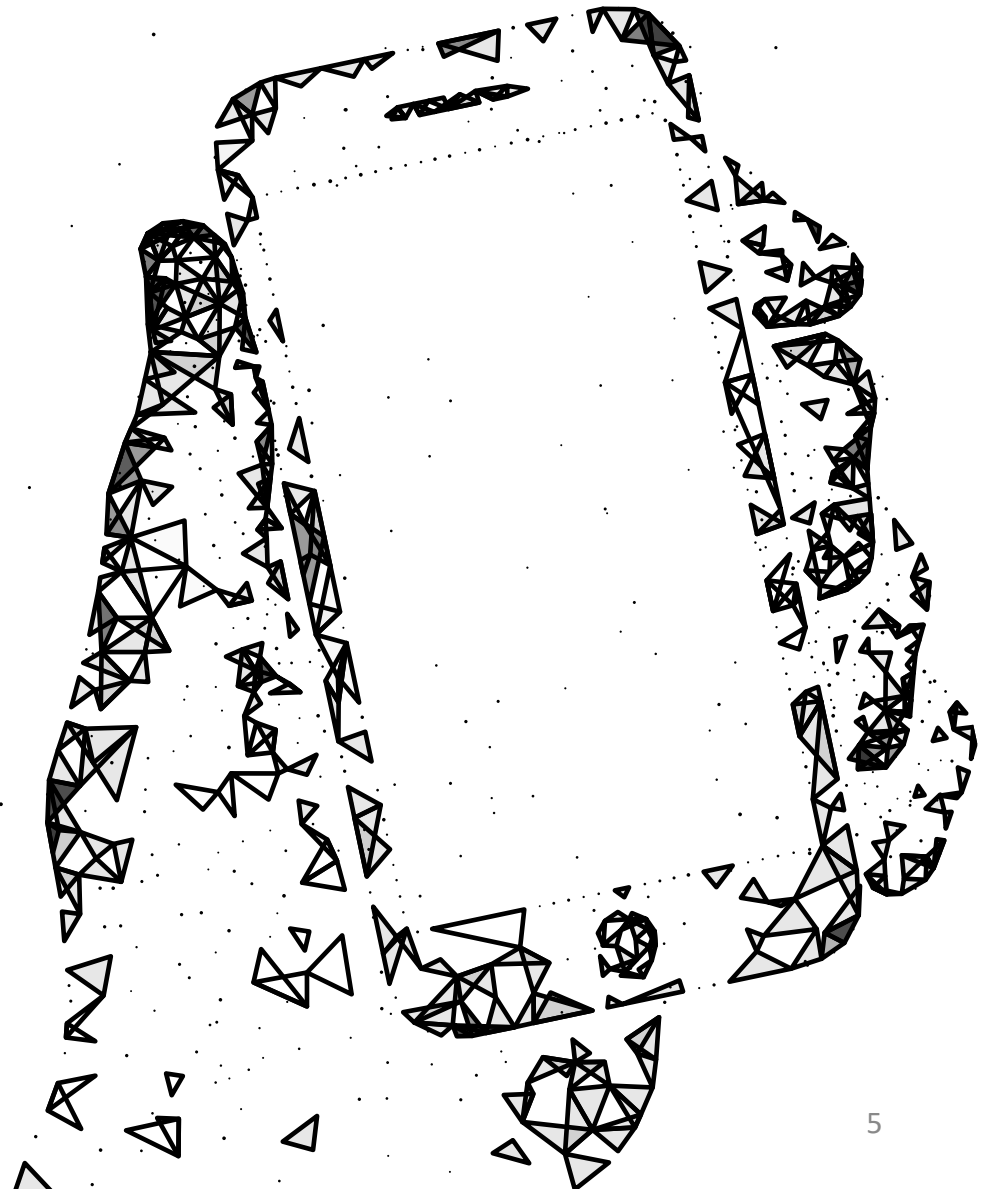
ARPU from Domestic Fixed Voice Services
from Q2 2021 to Q2 2022



Mobile Voice

1/6/2023

TATT: 2/10/1/3



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,986,000



Y-o-Y PERCENT CHANGE

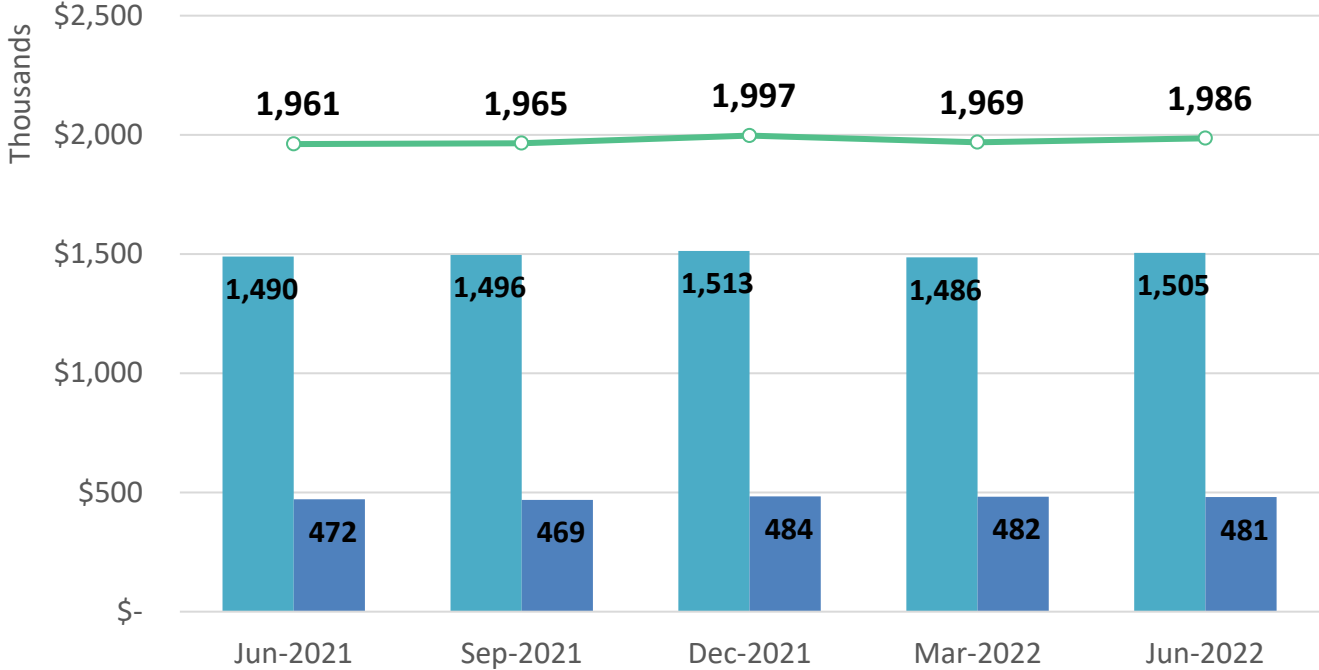
1.3%



Q-o-Q PERCENT CHANGE

0.9%

Number of Mobile Voice Subscriptions from Q2 2021 to Q2 2022



Prepaid Subscriptions Postpaid Subscriptions Total Mobile Voice Subscriptions

Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

145



**Y-o-Y
PERCENT
CHANGE**

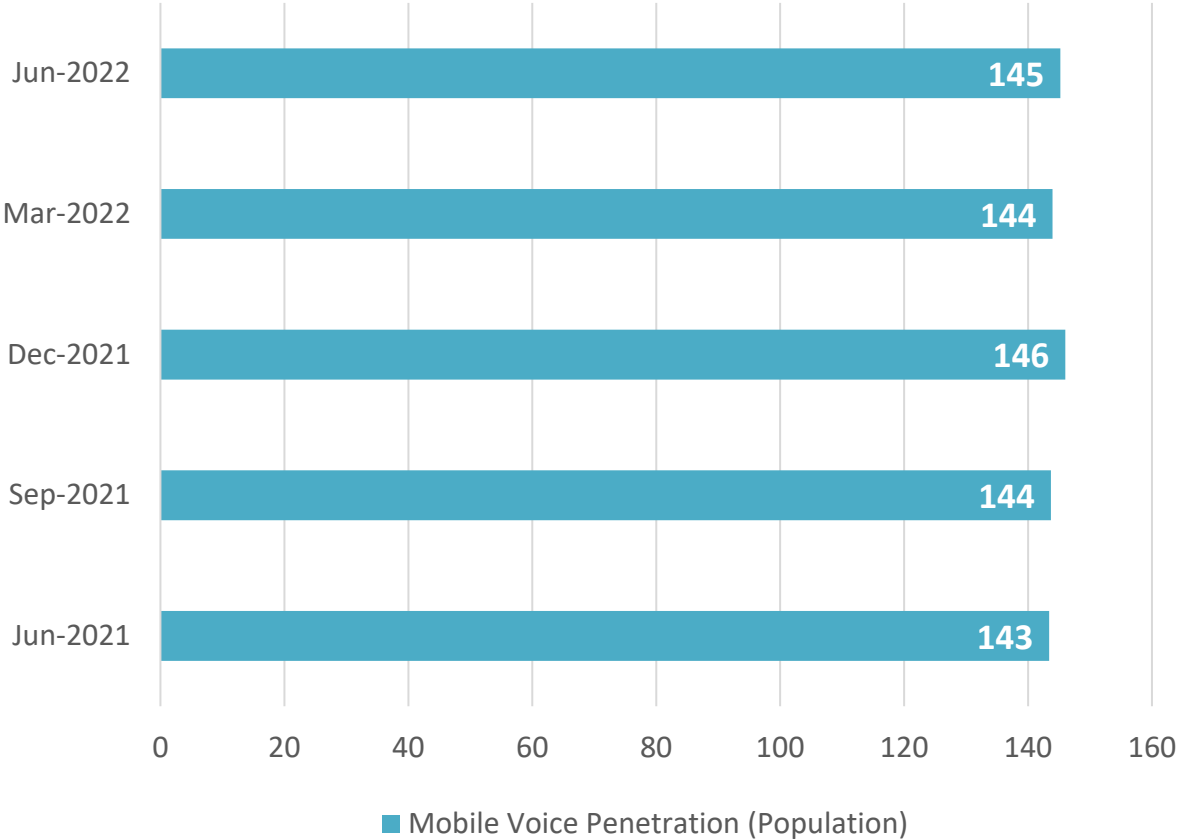
1.4%



**Q-o-Q
PERCENT
CHANGE**

0.7%

Penetration of Mobile Voice Subscriptions
from Q2 2021 to Q2 2022



Mobile Services Revenues



GROSS REVENUES

\$ 475.7m



Y-o-Y PERCENT CHANGE

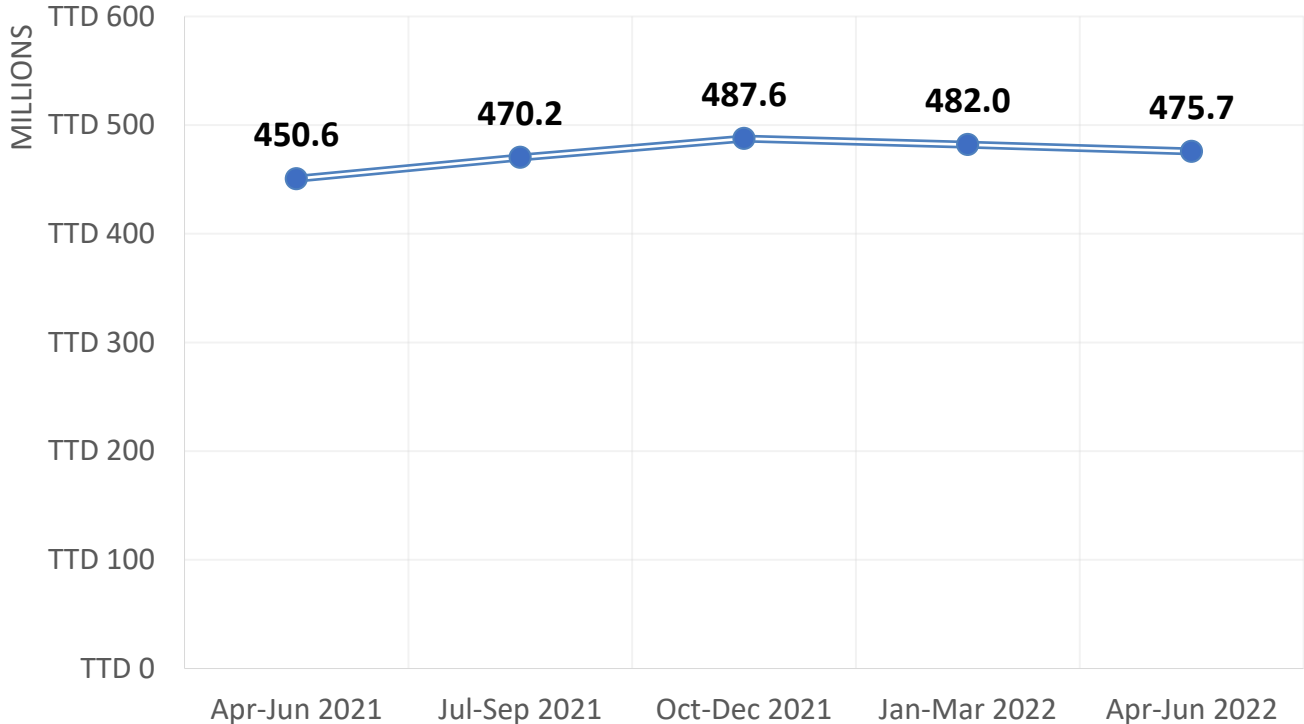
5.6%



Q-o-Q PERCENT CHANGE

-1.3%

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES FROM Q2 2021 TO Q2 2022



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

Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,185



Y-o-Y
PERCENT
CHANGE

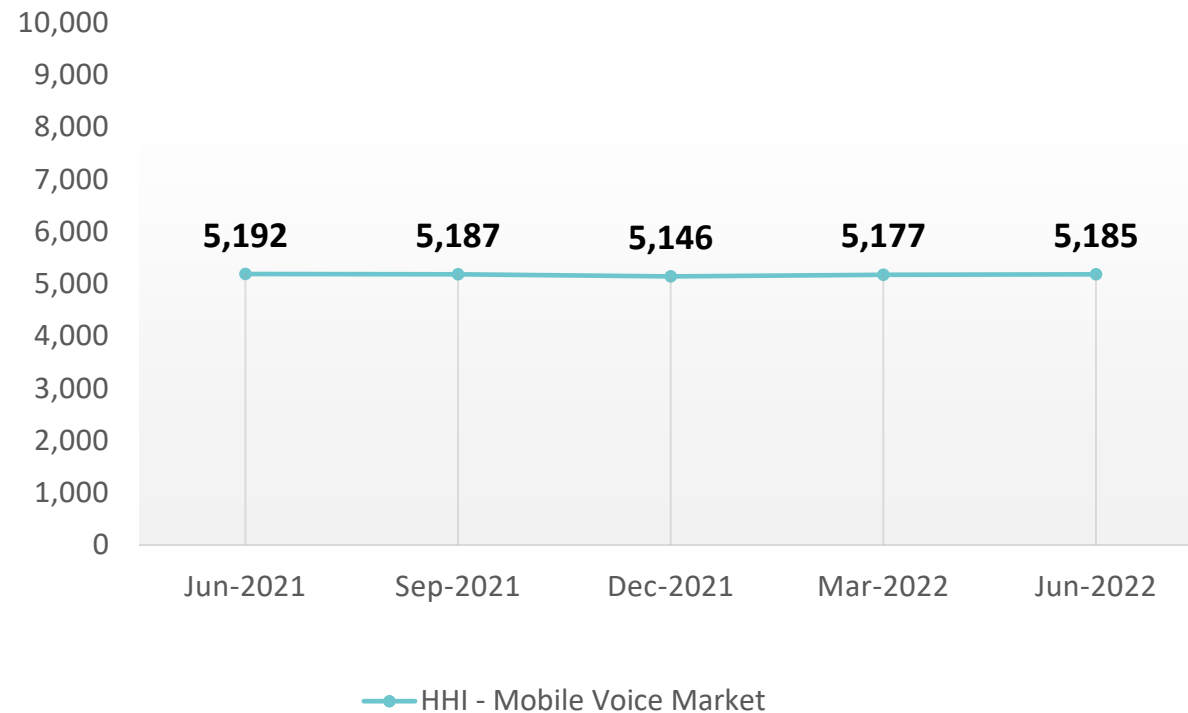
-0.1%



Q-o-Q
PERCENT
CHANGE

0.2%

HHI for Domestic Mobile Services
from Q2 2021 to Q2 2022



Average Revenue Per User

Mobile Services



ARPU
\$241



Y-o-Y
PERCENT
CHANGE

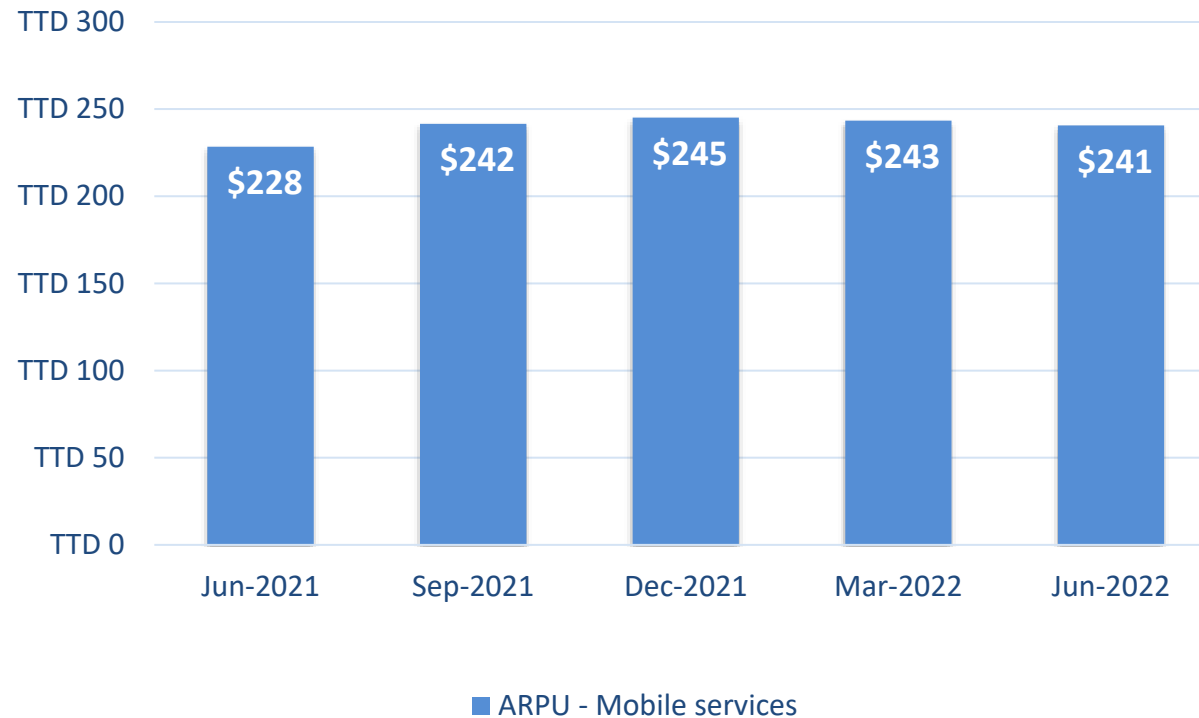
5.7%



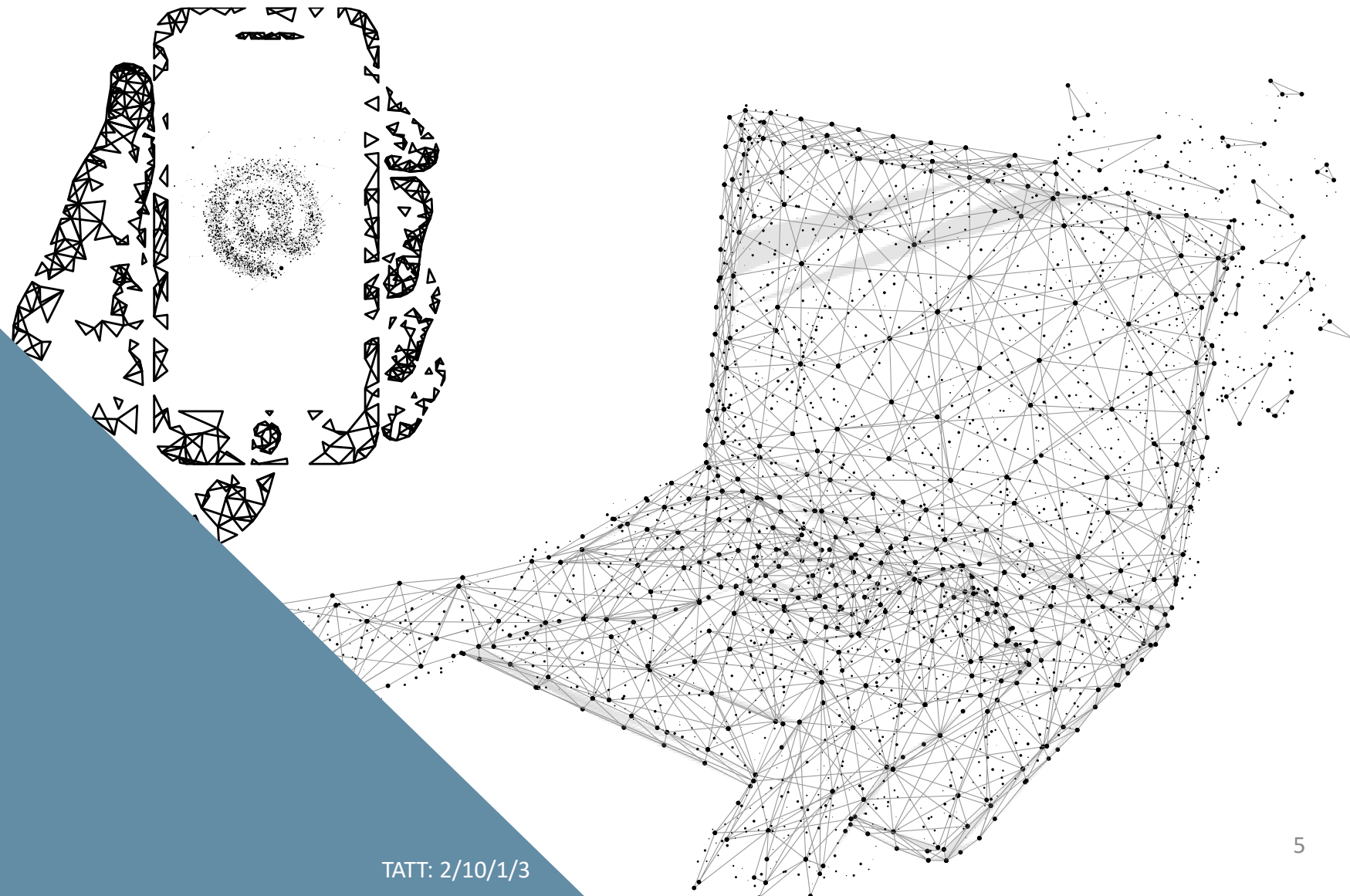
Q-o-Q
PERCENT
CHANGE

-0.8%

ARPU for Domestic Mobile Services
from Q2 2021 to Q2 2022



Internet



Fixed Broadband Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

375,300



Y-o-Y PERCENT CHANGE

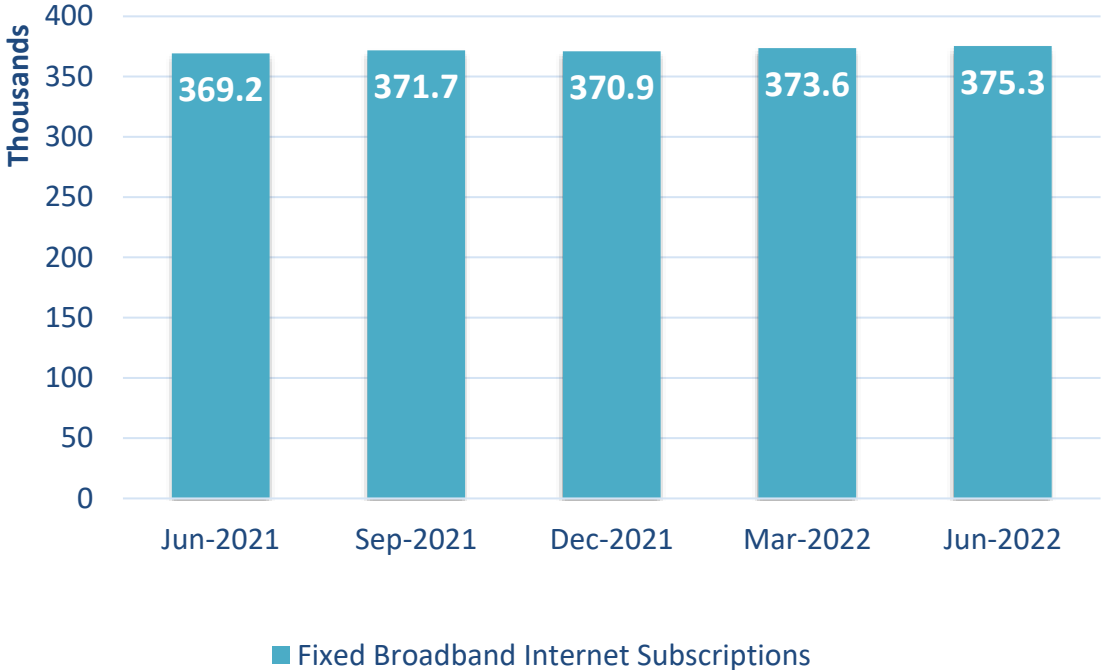
1.7%



Q-o-Q PERCENT CHANGE

0.5%

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

28



**Y-o-Y
PERCENT
CHANGE**

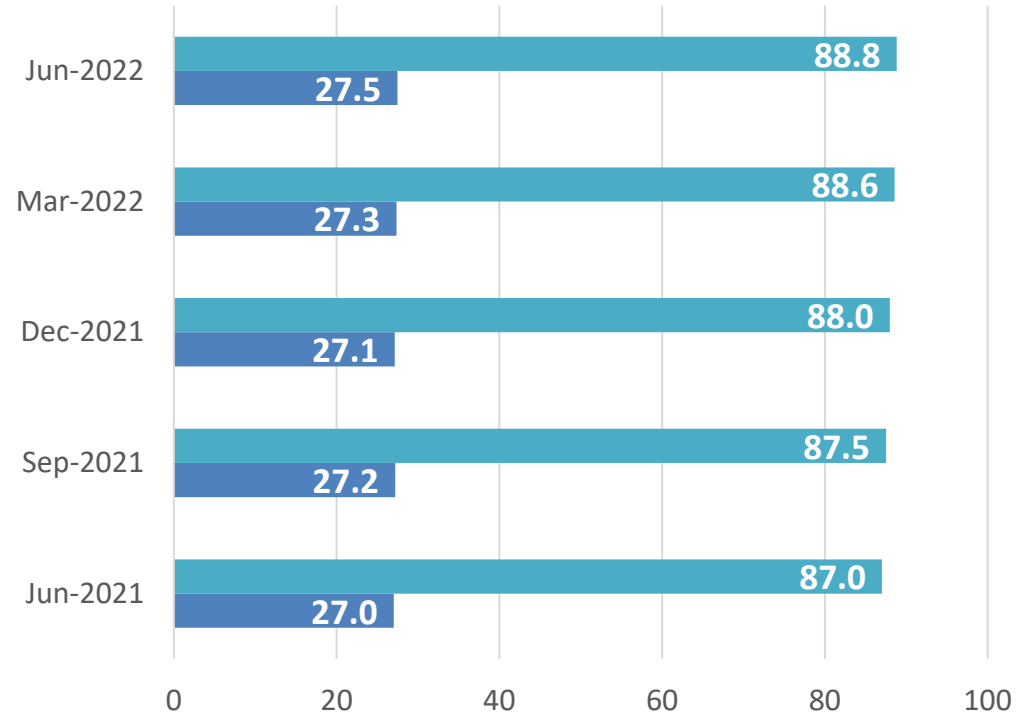
1.9%



**Q-o-Q
PERCENT
CHANGE**

0.7%

Penetration for Fixed Internet Subscriptions
from Q2 2021 to Q2 2022



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



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

90



**Y-o-Y
PERCENT
CHANGE**

2.1%



**Q-o-Q
PERCENT
CHANGE**

0.2%

** 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**

57



**Y-o-Y
PERCENT
CHANGE**

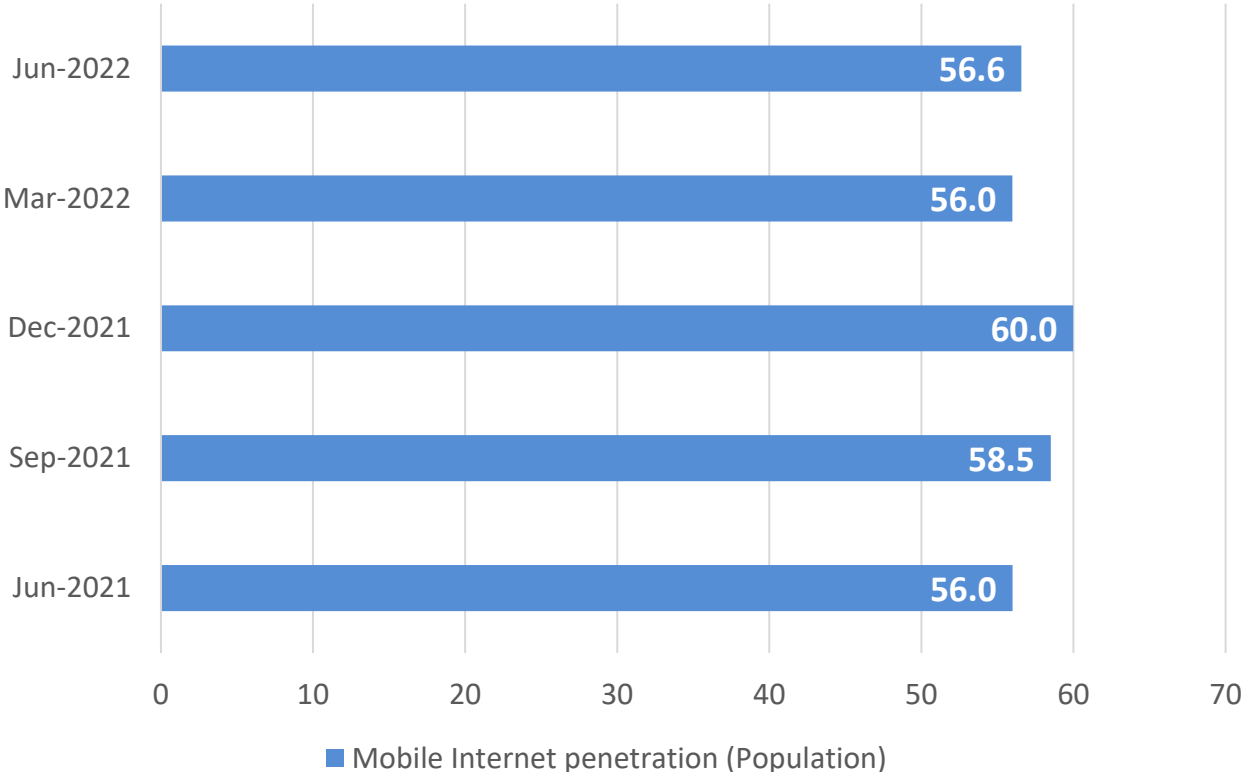
1.1%



**Q-o-Q
PERCENT
CHANGE**

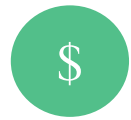
1.1%

Penetration for Mobile Internet Subscriptions
from Q2 2021 to Q2 2022



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

Fixed Internet Revenues



GROSS REVENUES
\$ 313.8m

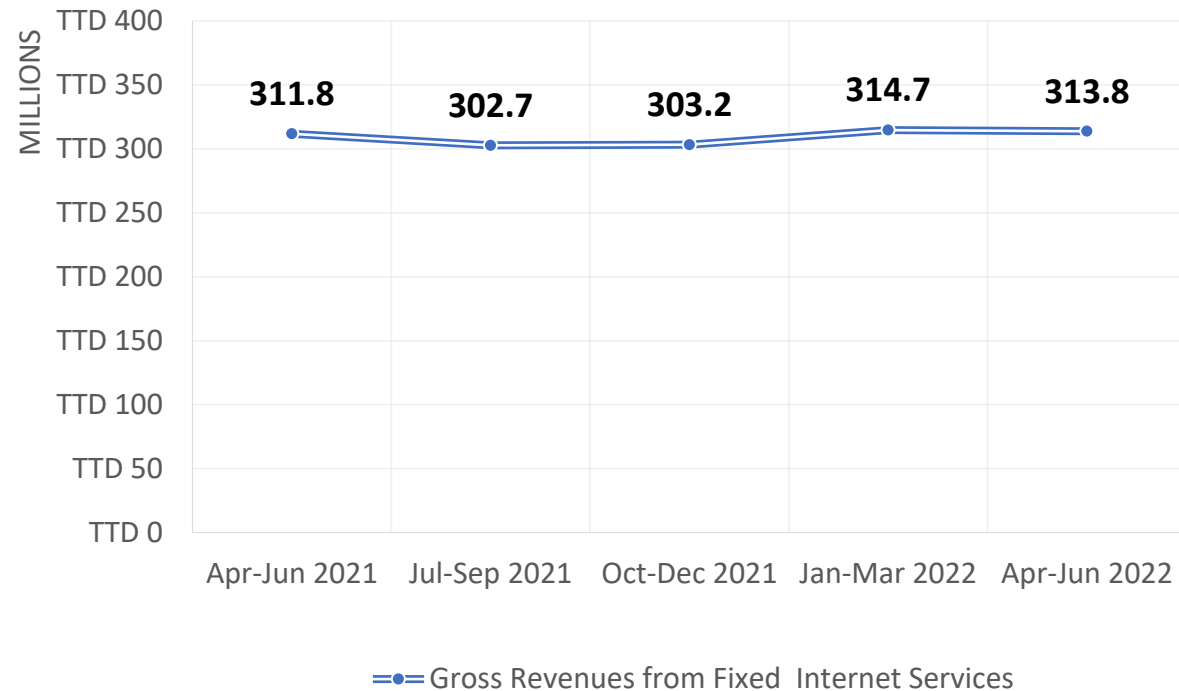


Y-o-Y
PERCENT CHANGE
0.6%



Q-o-Q
PERCENT CHANGE
-0.3%

Gross Revenues From Fixed Internet Services
From Q2 2021 To Q2 2022



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

Fixed Internet HHI



HHI
2,867



Y-o-Y
PERCENT
CHANGE

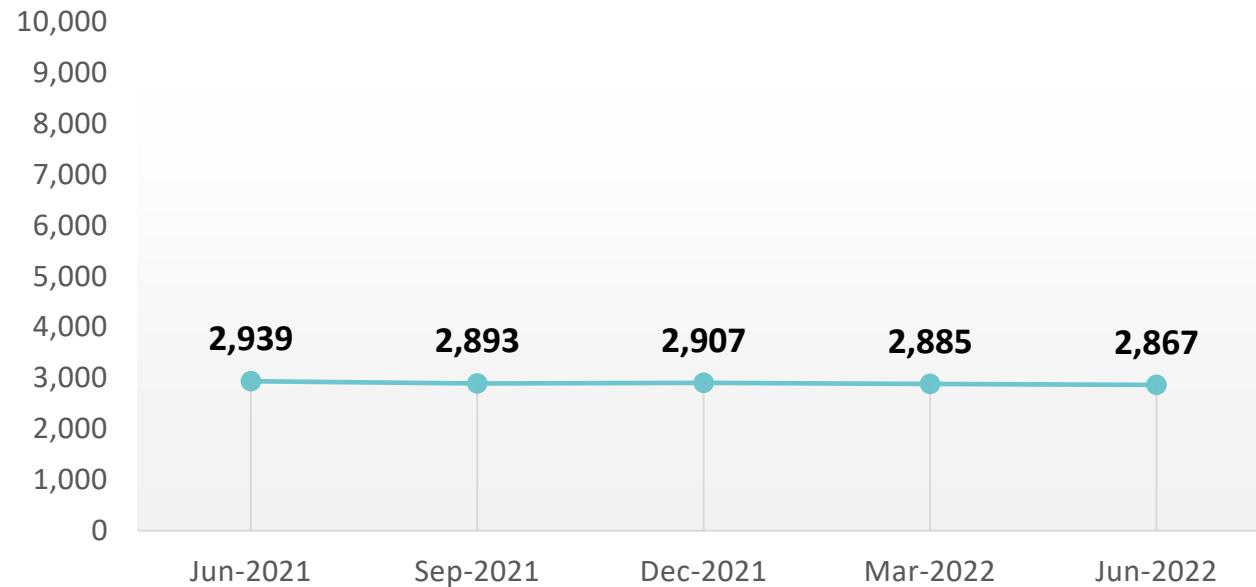
-2.5%



Q-o-Q
PERCENT
CHANGE

-0.7%

HHI for Fixed Internet Services
from Q2 2021 to Q2 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
\$836

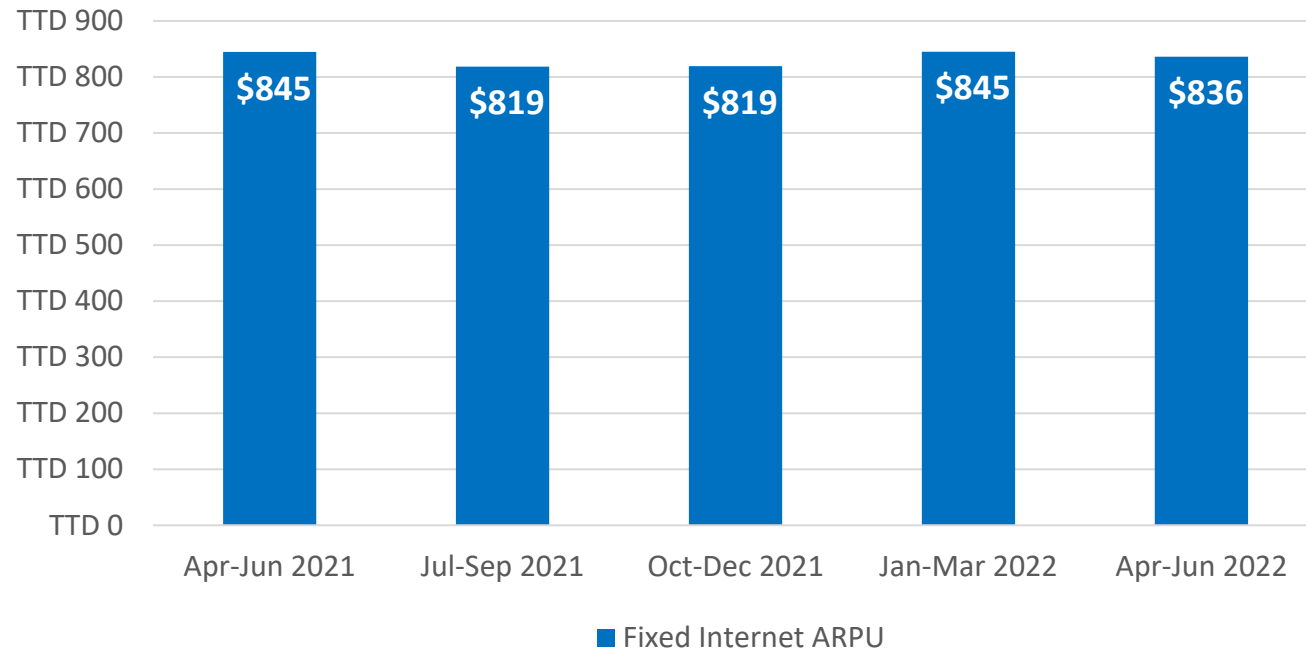


Y-o-Y
PERCENT
CHANGE
-1.1%



Q-o-Q
PERCENT
CHANGE
-1.1%

ARPU for Fixed Internet Services
from Q2 2021 to Q2 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

230,600



Y-o-Y
PERCENT
CHANGE

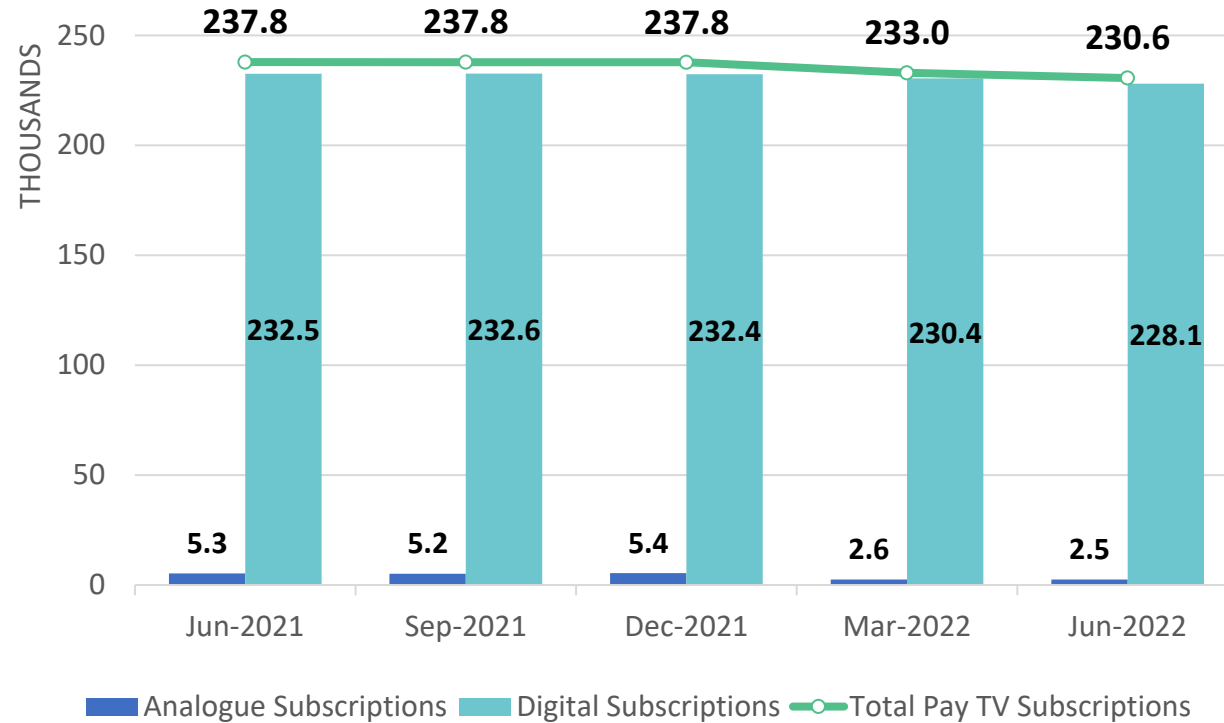
-3.0%



Q-o-Q
PERCENT
CHANGE

-1.0%

Number of Pay TV Subscriptions
from Q2 2021 to Q2 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**

17



**Y-o-Y
PERCENT
CHANGE**

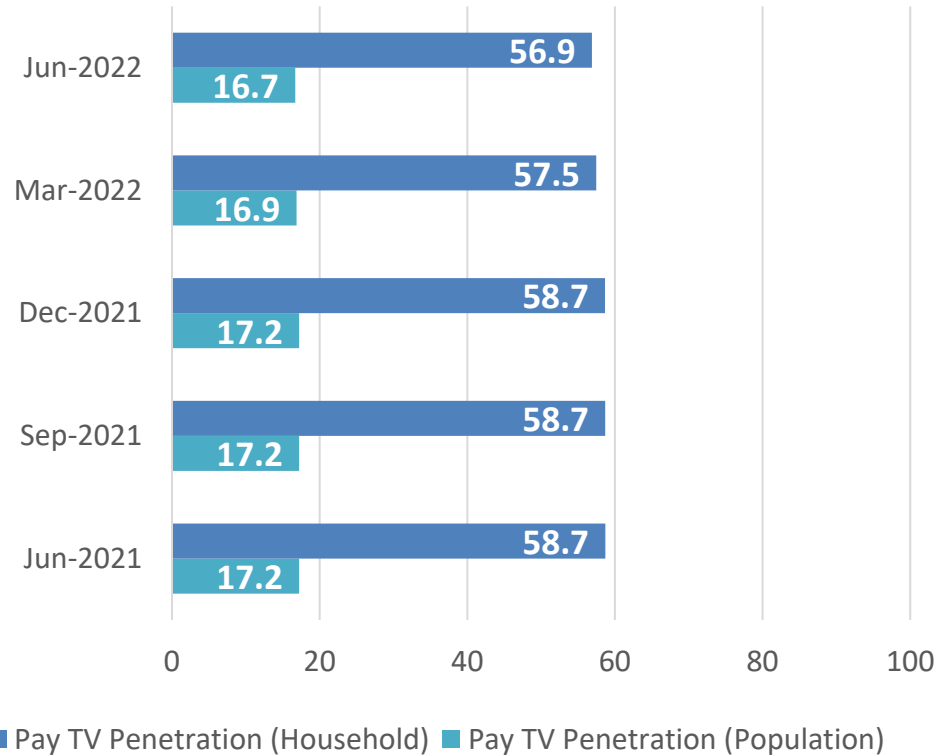
-2.9%



**Q-o-Q
PERCENT
CHANGE**

-1.2%

Penetration Rates of Pay TV Services
from Q2 2021 to Q2 2022



**PAY TV
PENETRATION
PER 100
HOUSEHOLDS**

57



**Y-O-Y
PERCENT
CHANGE**

-3.1%

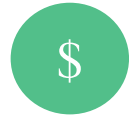


**Q-O-Q
PERCENT
CHANGE**

-1.0%

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

Pay TV Revenues



**GROSS
REVENUES**

\$157m



**Y-o-Y
PERCENT
CHANGE**

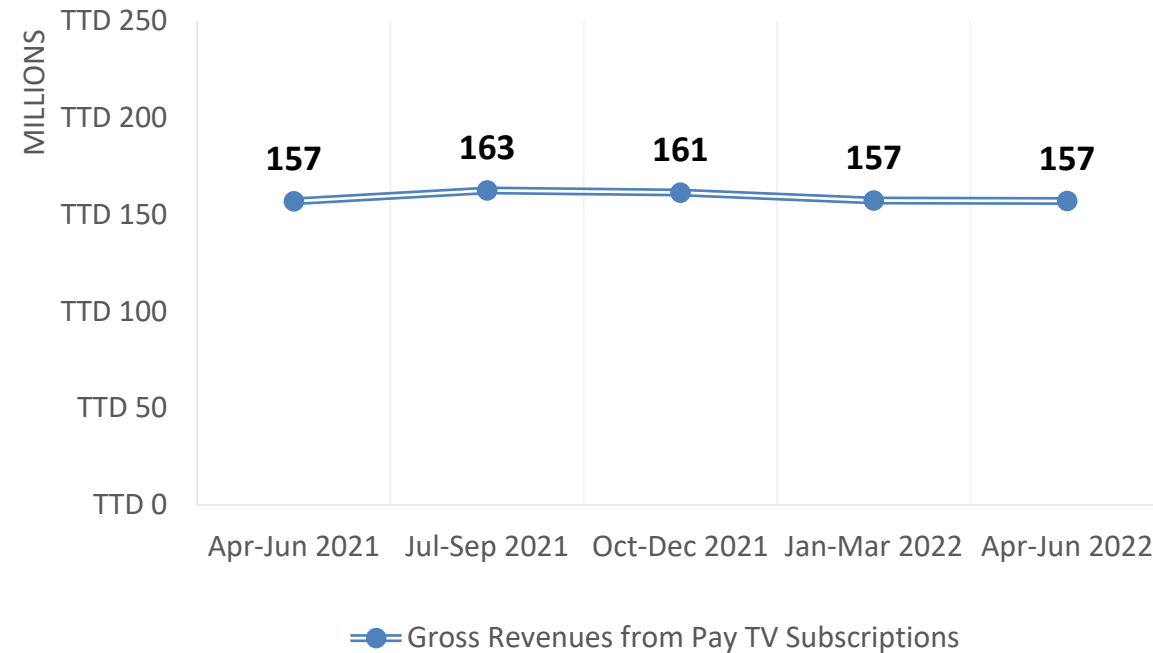
0%



**Q-o-Q
PERCENT
CHANGE**

0%

**Gross Revenues from Pay TV Services
from Q2 2021 to Q2 2022**



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

Pay TV HHI

HHI for Pay TV Services
from Q2 2021 to Q2 2022



HHI
3,405



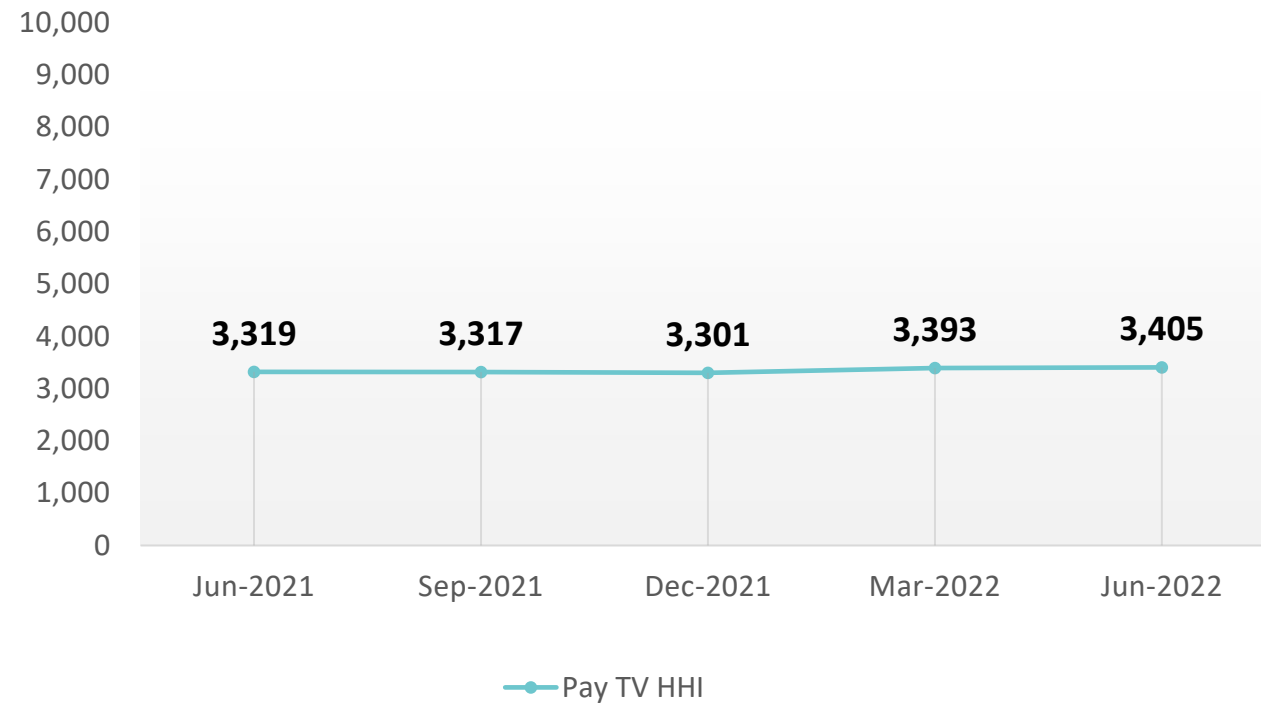
Y-o-Y
PERCENT
CHANGE

2.6%



Q-o-Q
PERCENT
CHANGE

0.4%



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

Pay TV

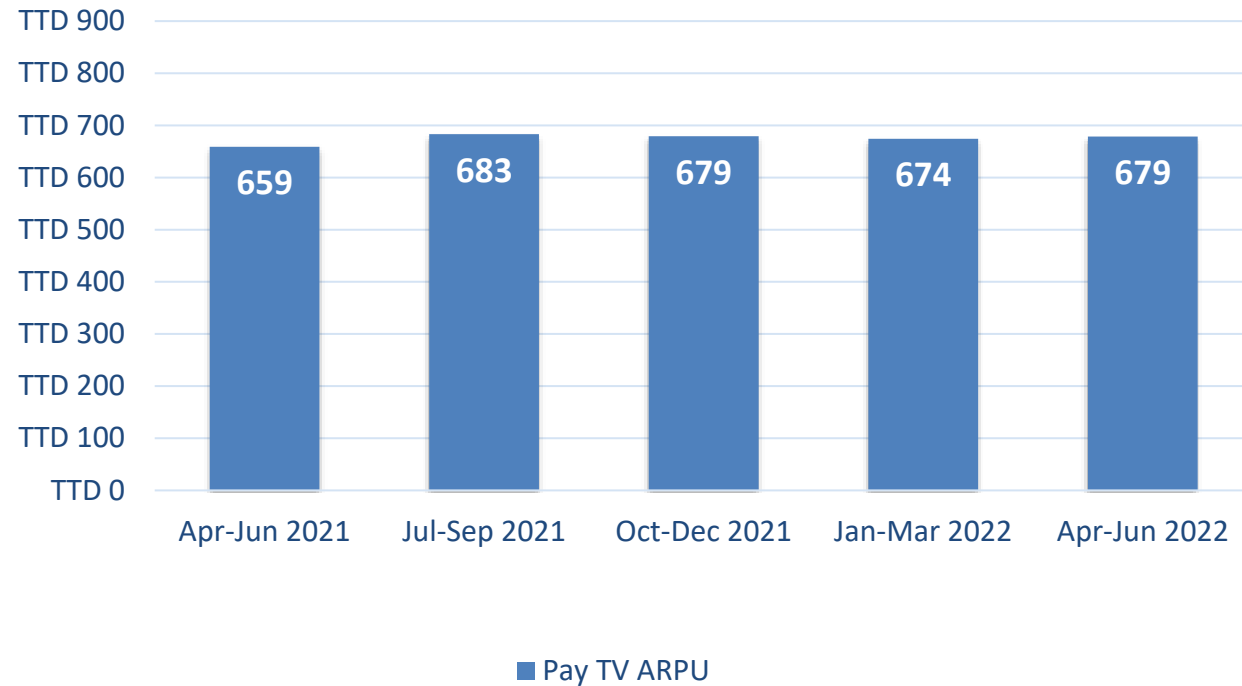
Average Revenue Per User

ARPU
\$ **\$679**

Y-o-Y
PERCENT
CHANGE
3.0%

Q-o-Q
PERCENT
CHANGE
0.7%

ARPU for Pay TV Services
from Q2 2021 to Q2 2022

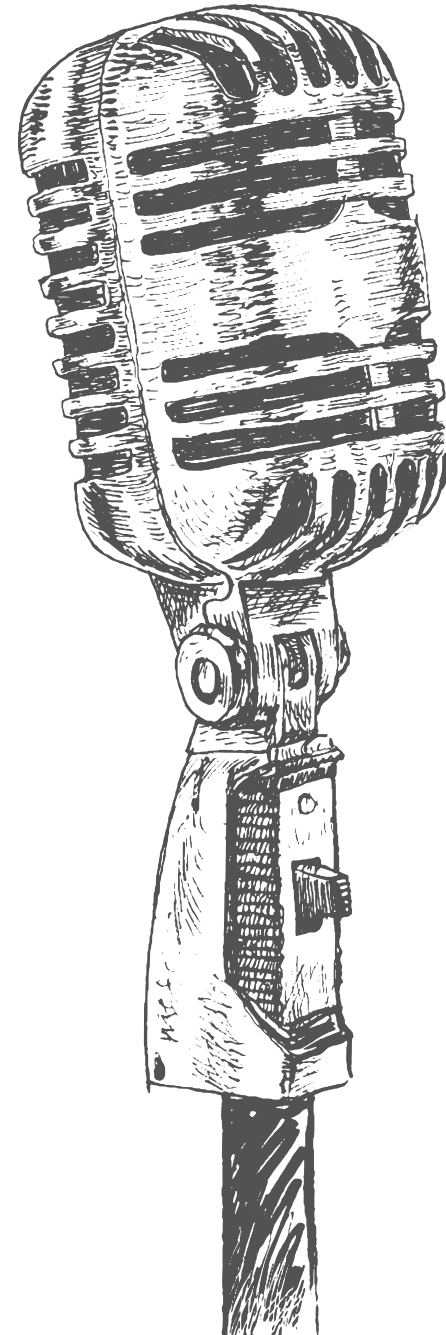


** Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

Free-to-Air Radio

1/6/2023

TATT: 2/10/1/3



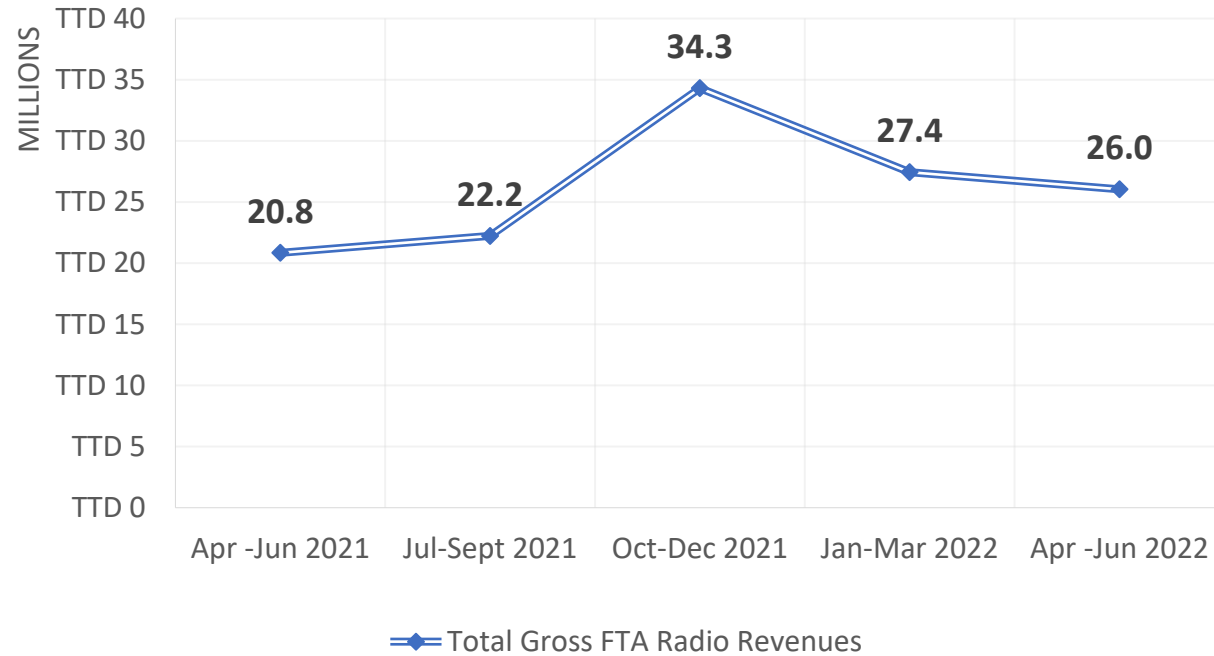
Free-to-Air Radio Revenues

GROSS REVENUES
\$26.0m

Y-o-Y PERCENT CHANGE
25.0%

Q-o-Q PERCENT CHANGE
-5.1%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q2 2021 TO Q2 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
468

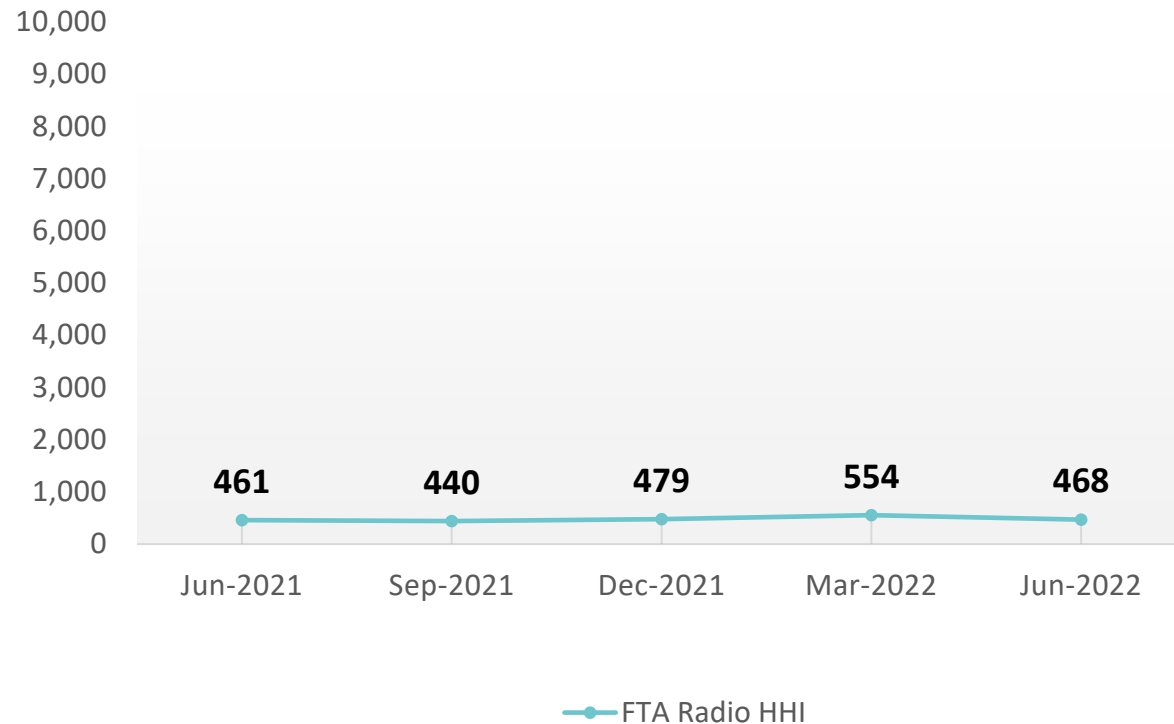


Y-o-Y
PERCENT
CHANGE
1.5%



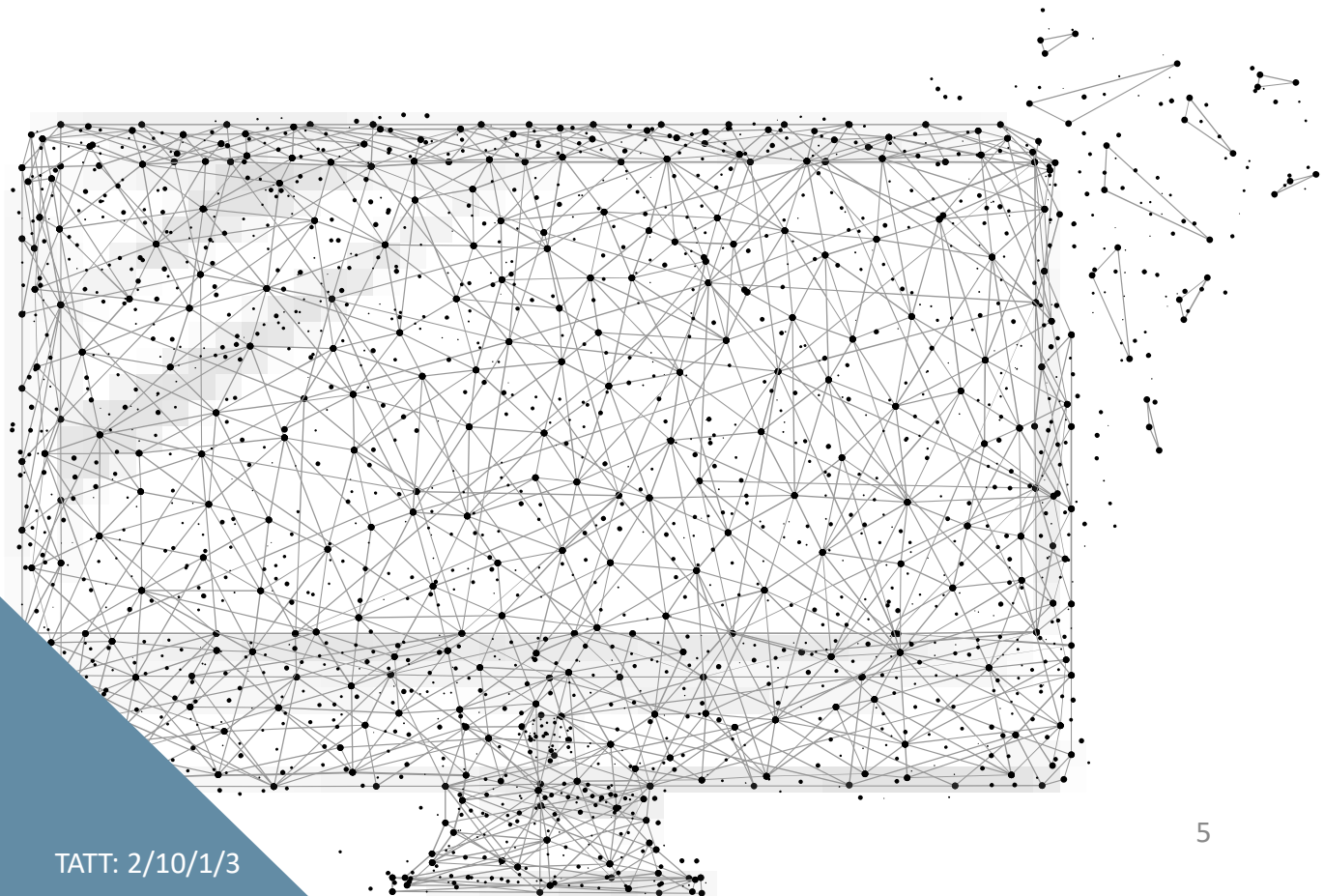
Q-o-Q
PERCENT
CHANGE
-15.5%

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



Free-to-Air TV Revenues

Gross Revenues from Free To Air TV Services
from Q2 2021 to Q2 2022



GROSS REVENUES

\$11.8m



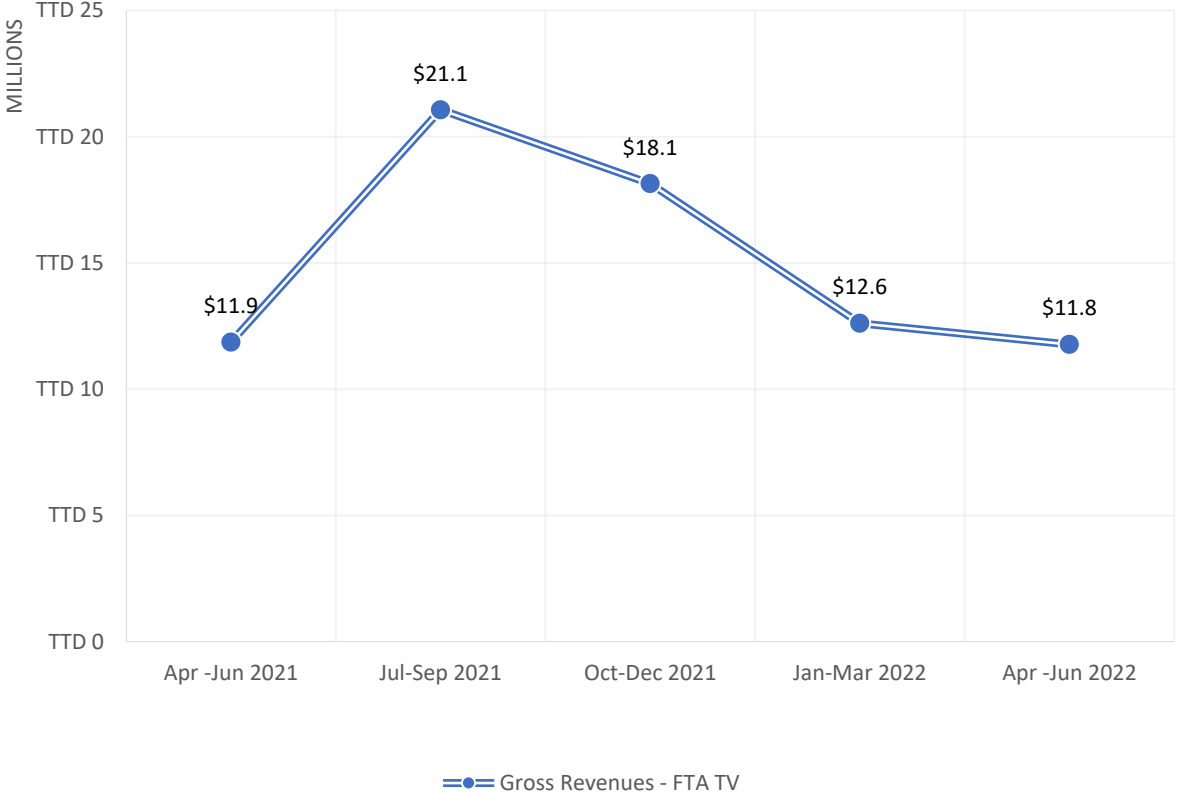
Y-o-Y PERCENT CHANGE

-0.8%



Q-o-Q PERCENT CHANGE

-6.4%



** 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
3,031

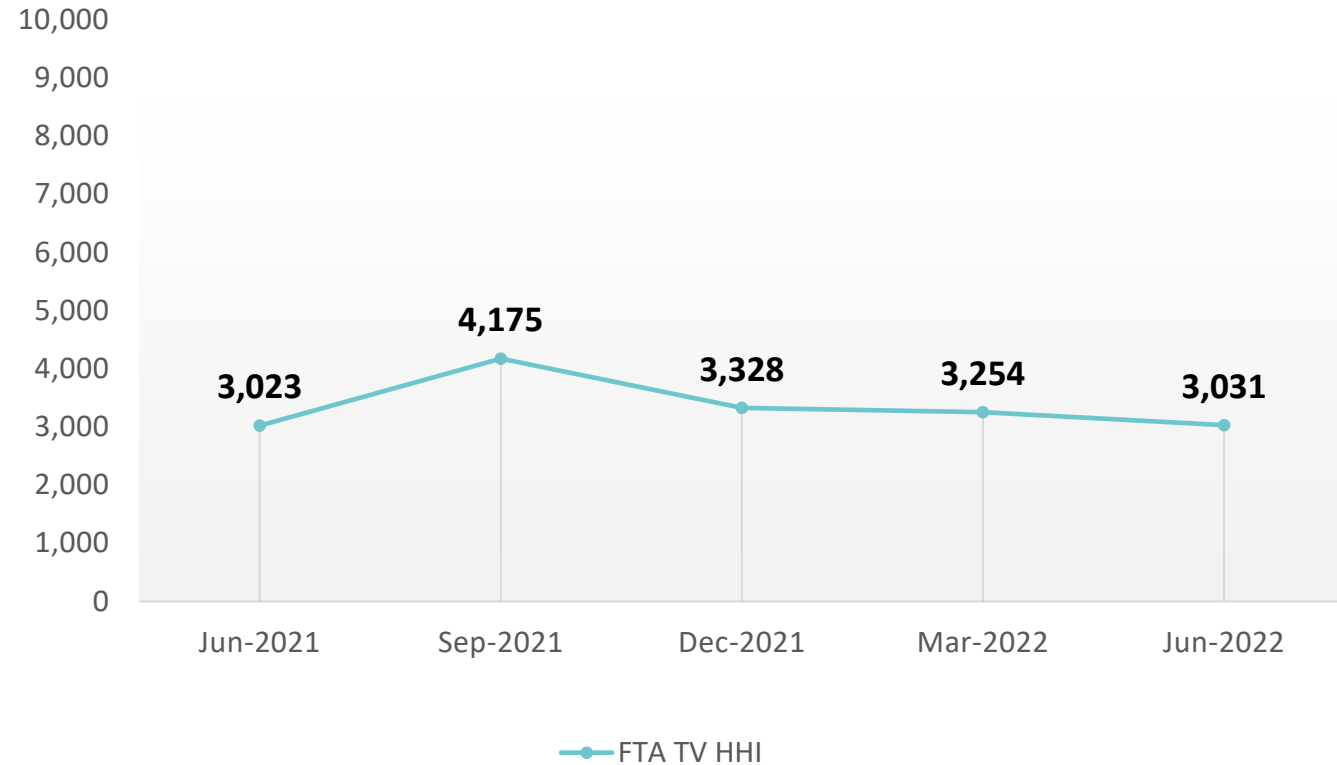
Y-o-Y
PERCENT
CHANGE

-0.3%

Q-o-Q
PERCENT
CHANGE

-6.9%

HHI for Free to Air TV Services
from Q2 2021 to Q2 2022



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

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