

QUARTERLY MARKET UPDATE

July to September 2022



Quarterly Market Update – Q3 2022

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Free-to-Air TV Market

Notes

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

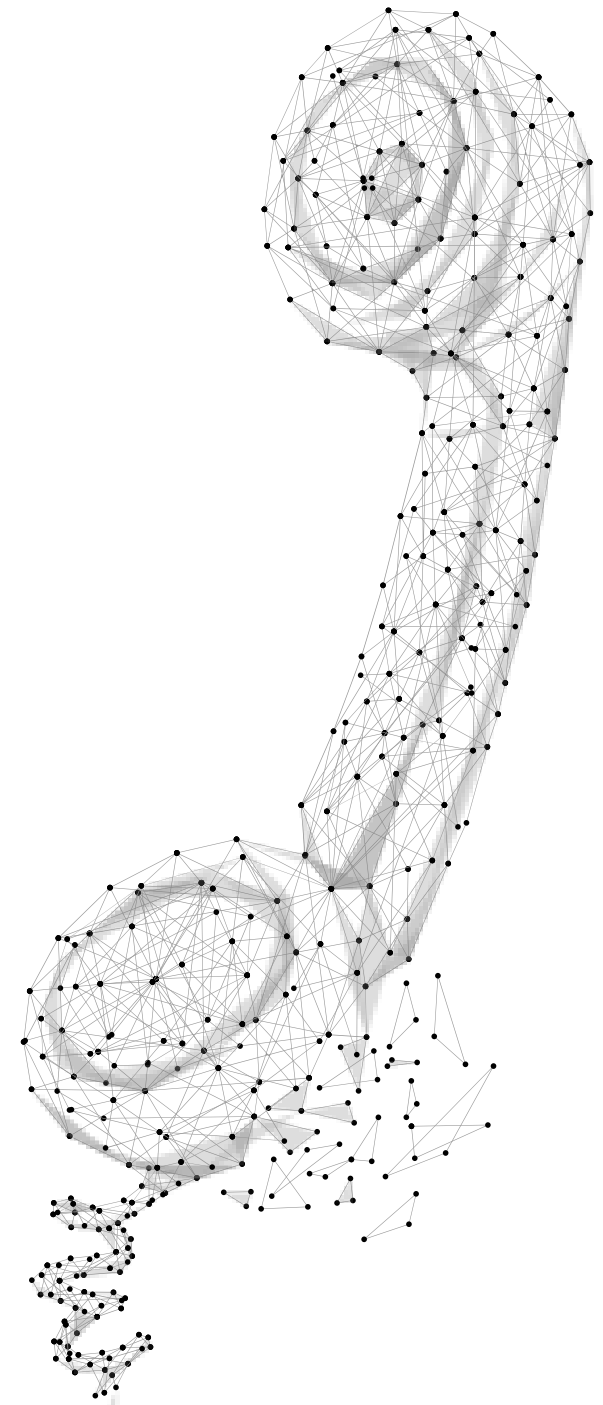
- 2. Penetration rates have been calculated using the following population figures:**
 - a) 1,367,558 (2021 Mid-year population estimate, Central Statistical Office)**

 - 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

327,000



Y-o-Y PERCENT CHANGE

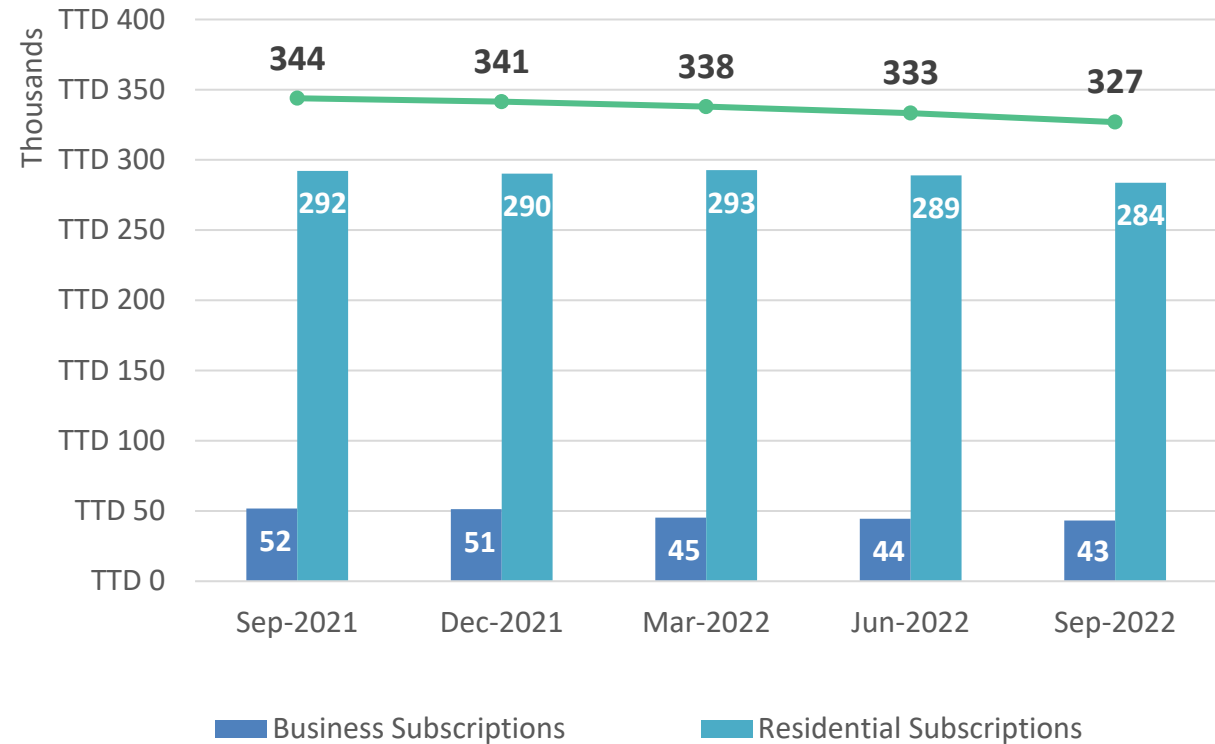
-4.9%



Q-o-Q PERCENT CHANGE

-1.8%

Number of Fixed Line Subscriptions
Q3 2021 to Q3 2022



Fixed Voice Penetration



**FIXED VOICE
PENETRATION PER
100 INHABITANTS**

23.9



**Y-o-Y
PERCENT
CHANGE**

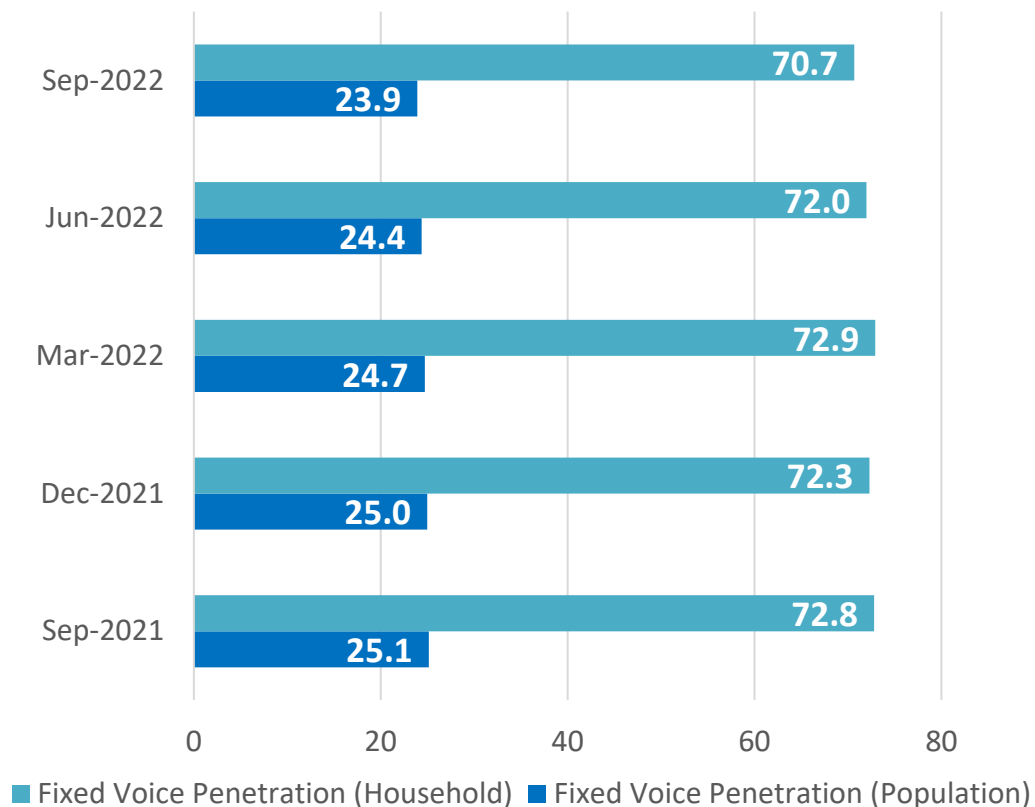
-4.8%



**Q-o-Q
PERCENT
CHANGE**

-2.1%

Penetration Rate of Fixed Line Subscriptions
from Q3 2021 to Q3 2022



**FIXED LINE
PENETRATION PER
100 HOUSEHOLDS**

70.7



**Y-o-Y
PERCENT
CHANGE**

-2.9%



**Q-o-Q
PERCENT
CHANGE**

-0.4%

Fixed Voice Revenues



GROSS REVENUES

\$89.0m



Y-o-Y PERCENT CHANGE

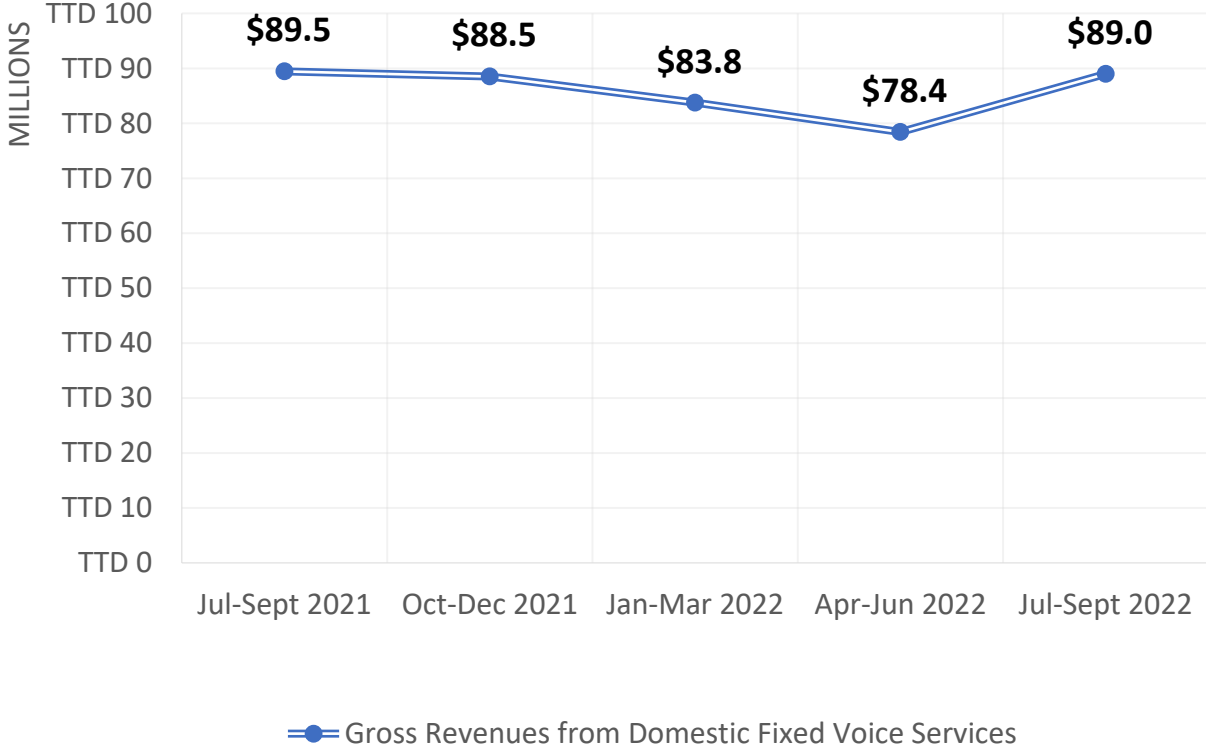
-0.6%



Q-o-Q PERCENT CHANGE

13.5%

Gross Revenues from Domestic Fixed Voice Services from Q3 2021 to Q3 2022



Fixed Voice HHI



HHI

3,423



Y-o-Y
PERCENT
CHANGE

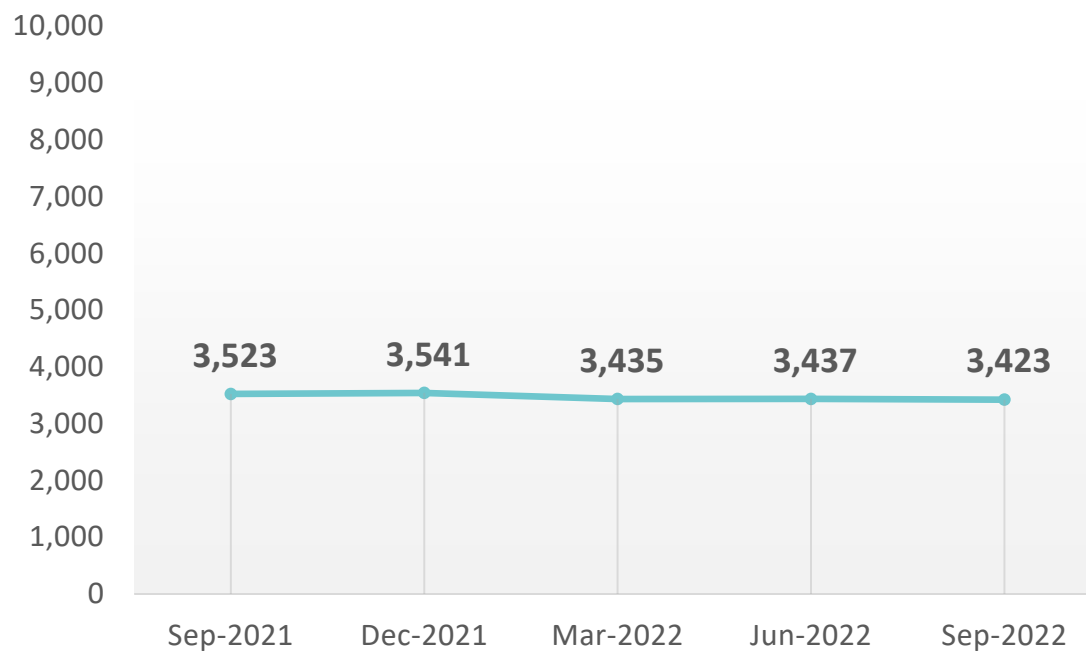
-2.8%



Q-o-Q
PERCENT
CHANGE

-0.4%

HHI for Domestic Fixed Line
from Q3 2021 to Q3 2022



Fixed Voice Average Revenue Per User



ARPU
\$270

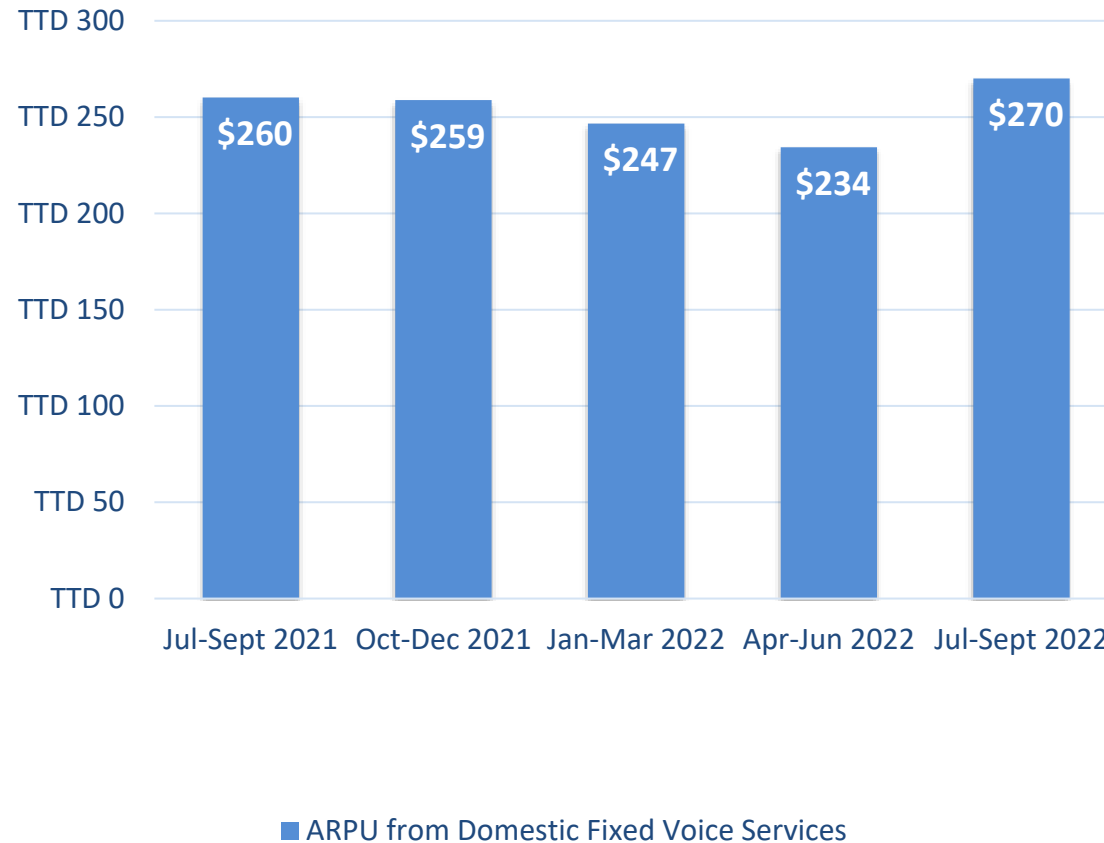


Y-o-Y
PERCENT
CHANGE
3.9%



Q-o-Q
PERCENT
CHANGE
15.4%

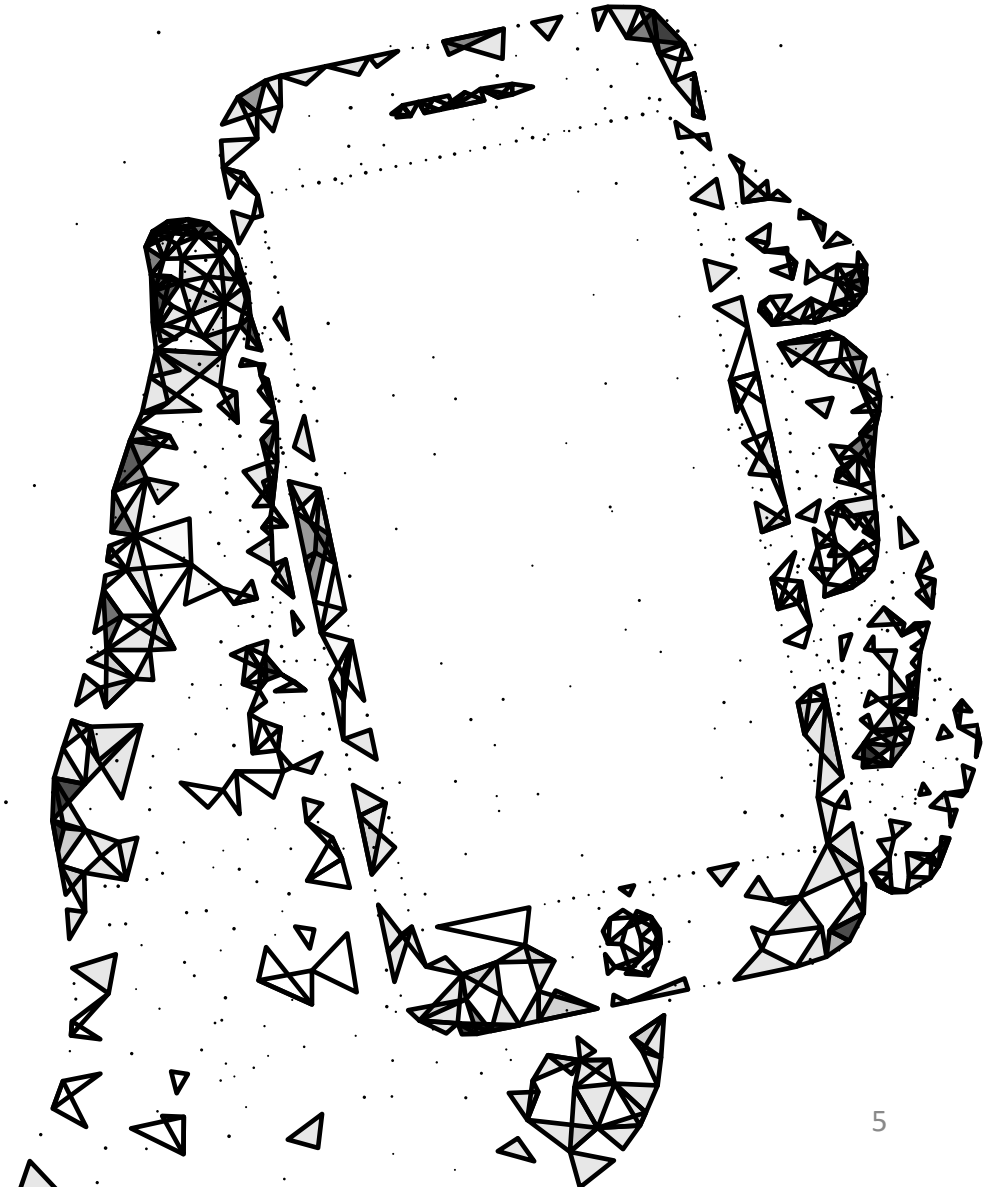
ARPU from Domestic Fixed Voice Services
from Q3 2021 to Q3 2022



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

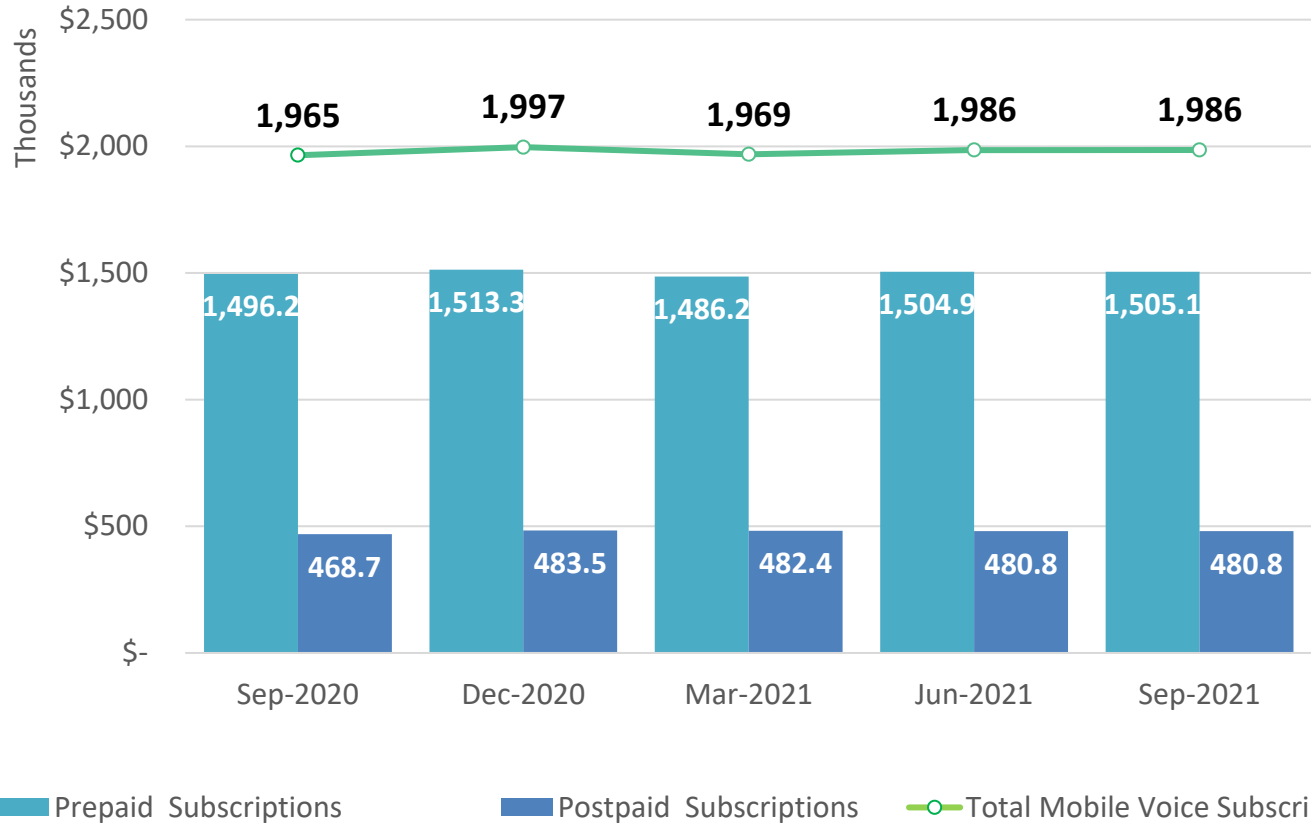
1.1%



Q-o-Q PERCENT CHANGE

0%

Number of Mobile Voice Subscriptions from Q3 2021 to Q3 2022



Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

145



**Y-o-Y
PERCENT
CHANGE**

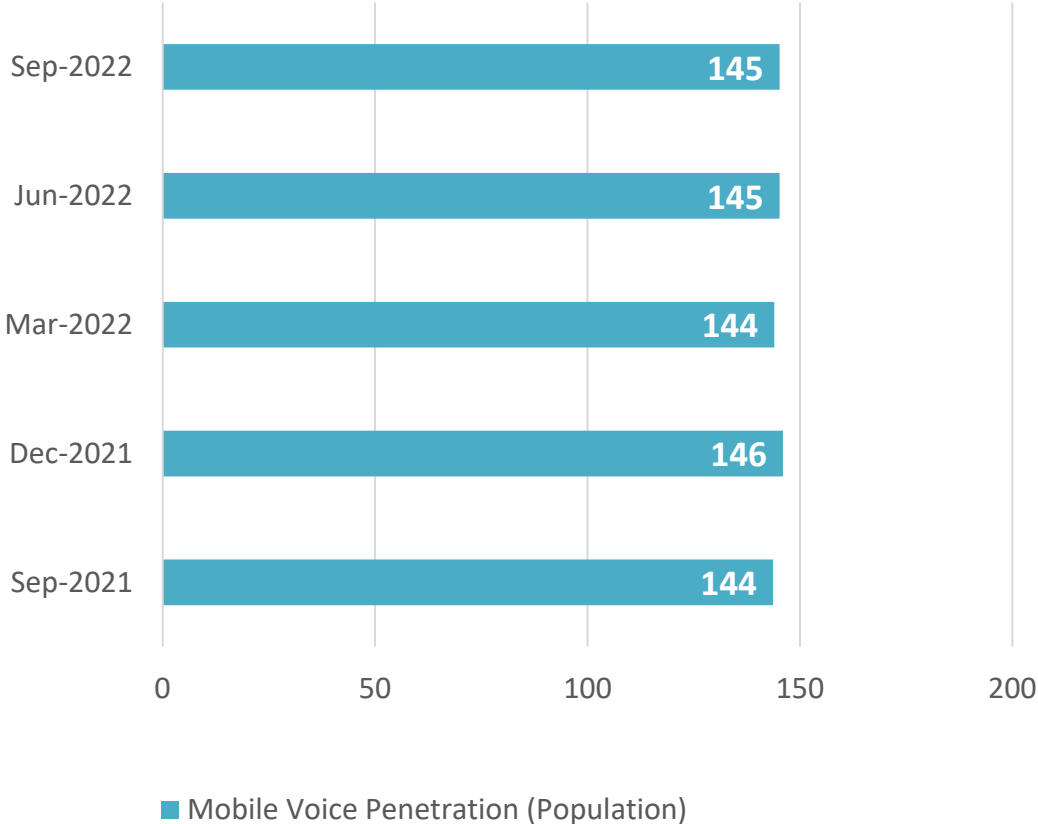
0.7%



**Q-o-Q
PERCENT
CHANGE**

0%

Penetration of Mobile Voice Subscriptions
from Q3 2021 to Q3 2022



Mobile Services Revenues



GROSS REVENUES

\$ 485m



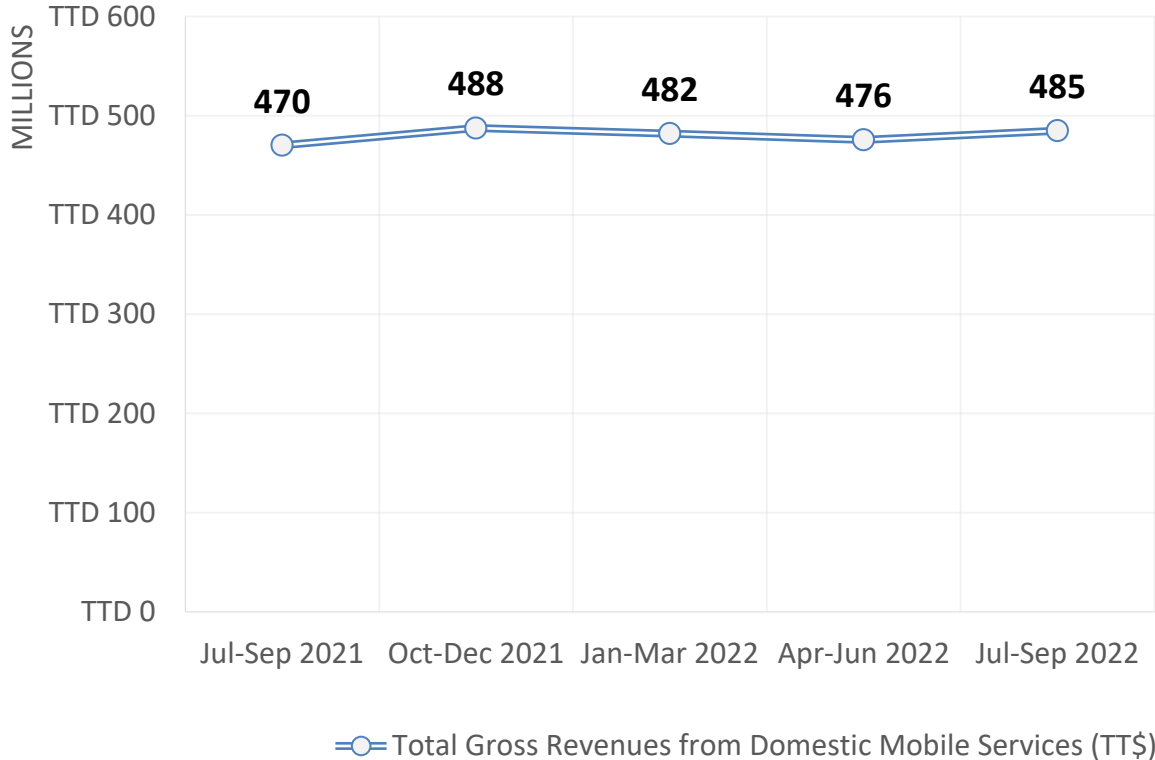
Y-o-Y PERCENT CHANGE

3.2%

Q-o-Q PERCENT CHANGE

1.9%

Total Gross Revenues from Domestic Mobile Services (TT\$) from Q3 2021 to Q3 2022



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,192



Y-o-Y
PERCENT
CHANGE

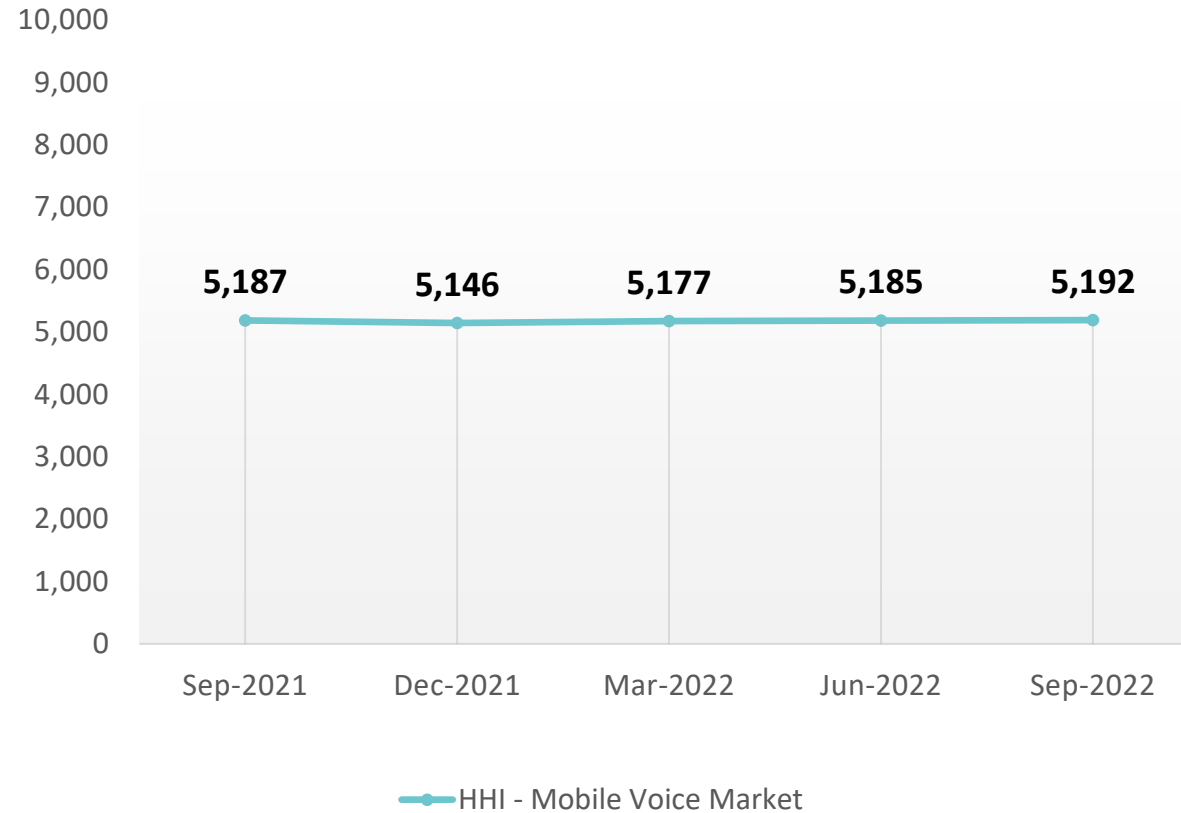
-0.1%



Q-o-Q
PERCENT
CHANGE

0.1%

HHI for Domestic Mobile Services
from Q3 2021 to Q3 2022



Average Revenue Per User

Mobile Services



ARPU
\$244



Y-o-Y
PERCENT
CHANGE

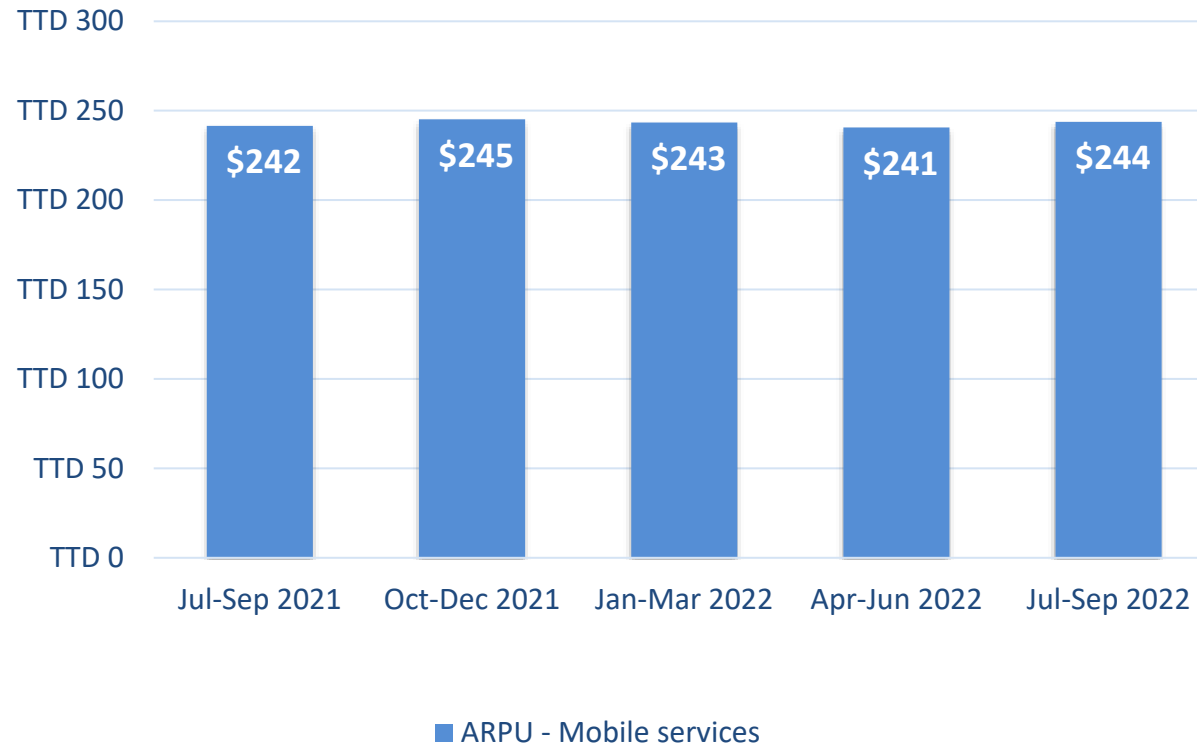
0.8%



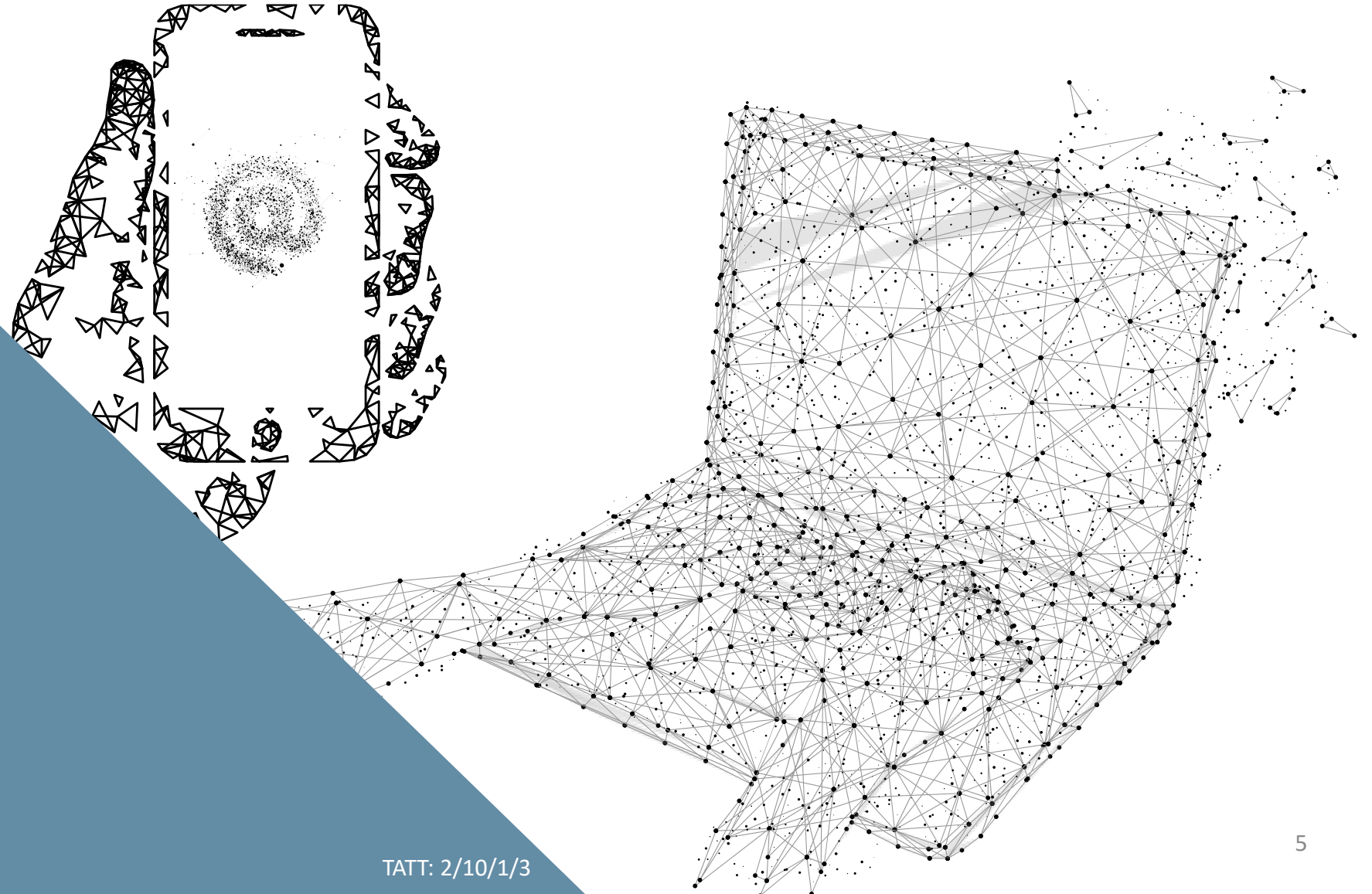
Q-o-Q
PERCENT
CHANGE

1.3%

ARPU for Domestic Mobile Services
from Q3 2021 to Q3 2022



Internet



Fixed Broadband Subscriptions



TOTAL NUMBER OF
SUBSCRIPTIONS

377,600



Y-o-Y
PERCENT
CHANGE

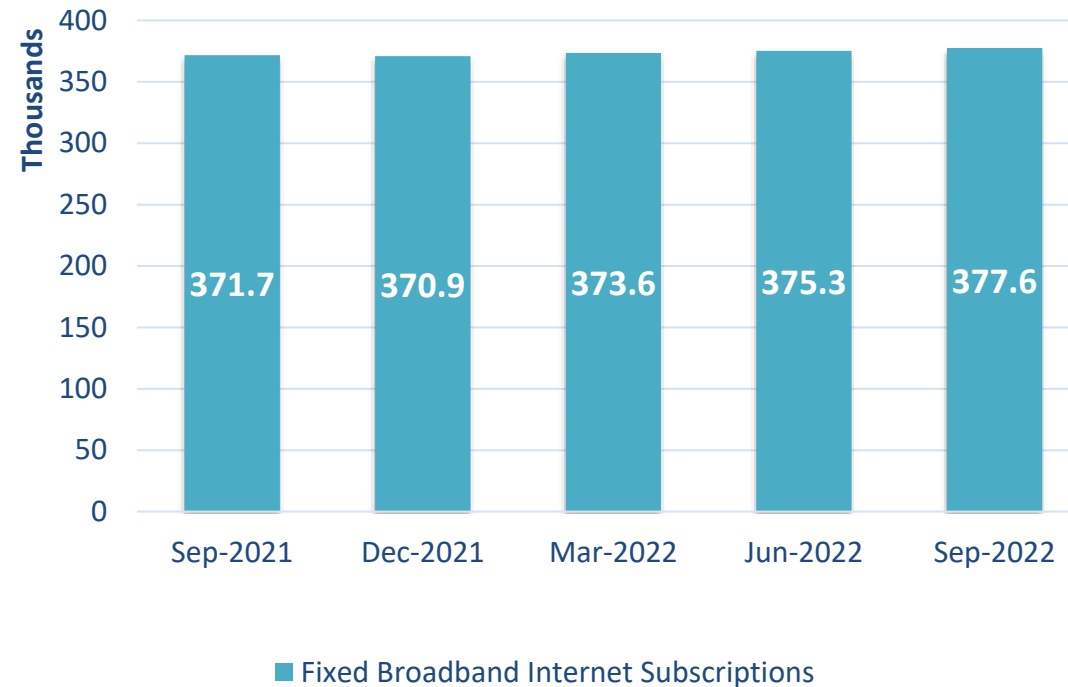
1.6%



Q-o-Q
PERCENT
CHANGE

0.6%

Number of Fixed Broadband Internet Subscriptions
from Q3 2021 to Q3 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**

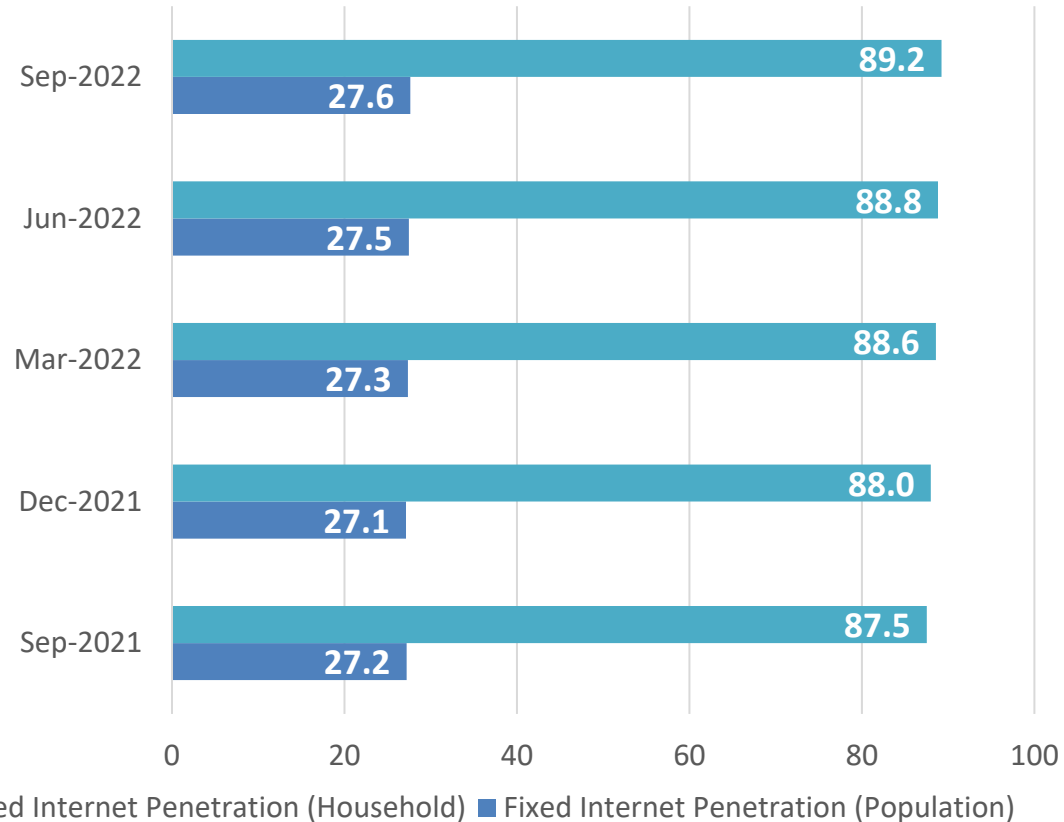
0.4%



**Q-o-Q
PERCENT
CHANGE**

0.4%

Penetration for Fixed Internet Subscriptions
from Q3 2021 to Q3 2022



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

90



**Y-O-Y
PERCENT
CHANGE**

0.7%



**Q-O-Q
PERCENT
CHANGE**

0.6%

** 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**

58



**Y-o-Y
PERCENT
CHANGE**

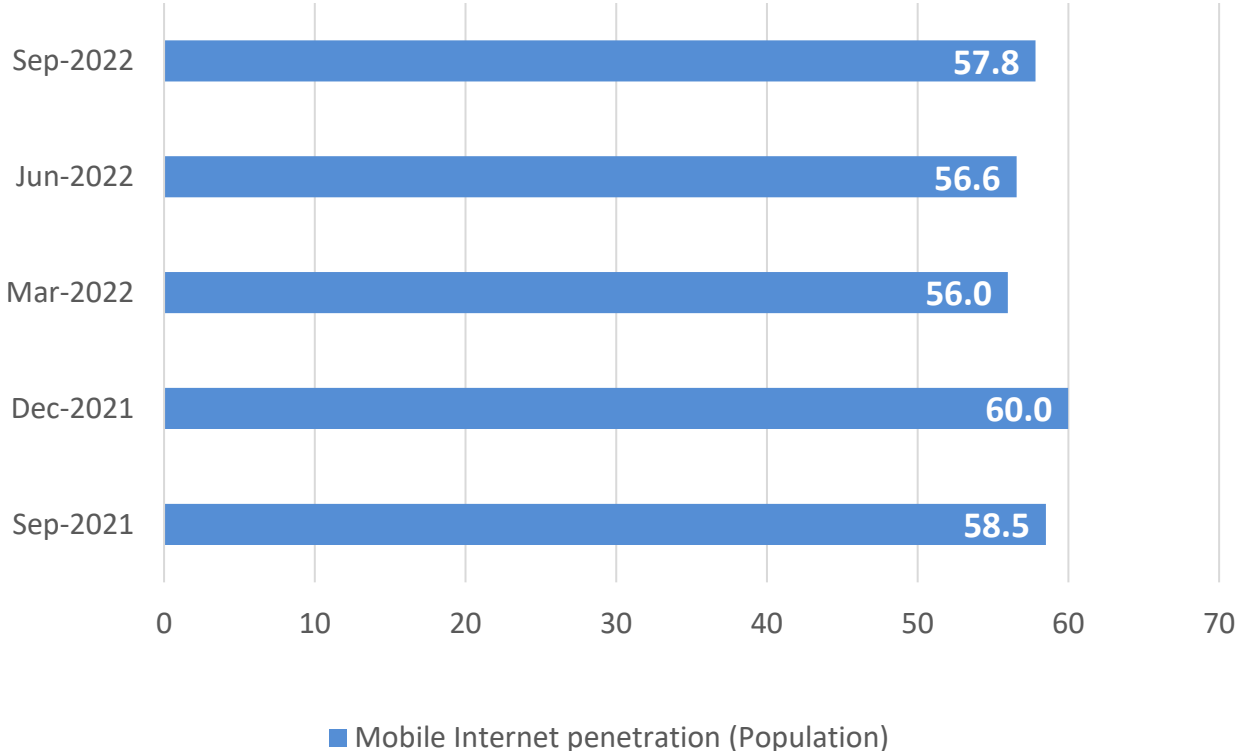
1.2%



**Q-o-Q
PERCENT
CHANGE**

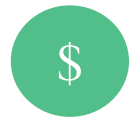
2.1%

Penetration for Mobile Internet Subscriptions
from Q3 2021 to Q3 2022



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

Fixed Internet Revenues



GROSS REVENUES
\$ 312.3m

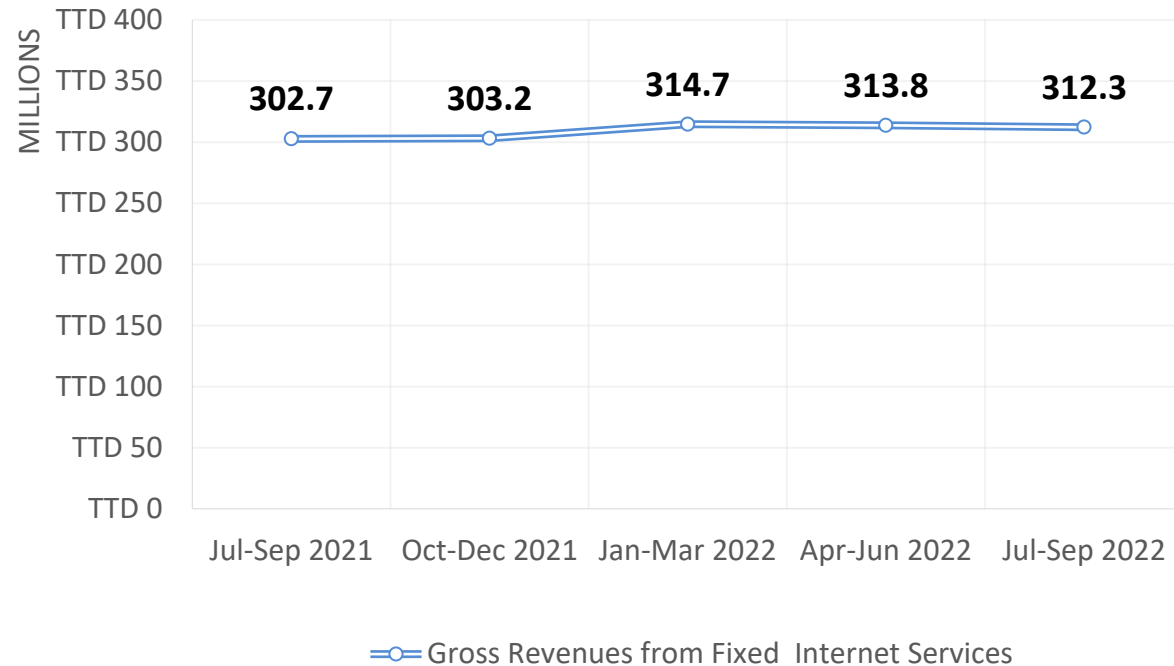


Y-o-Y
PERCENT CHANGE
3.2%



Q-o-Q
PERCENT CHANGE
-0.5%

Gross Revenues from Fixed Internet Services
from Q3 2021 to Q3 2022



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

Fixed Internet HHI



HHI
2,844



Y-o-Y
PERCENT
CHANGE

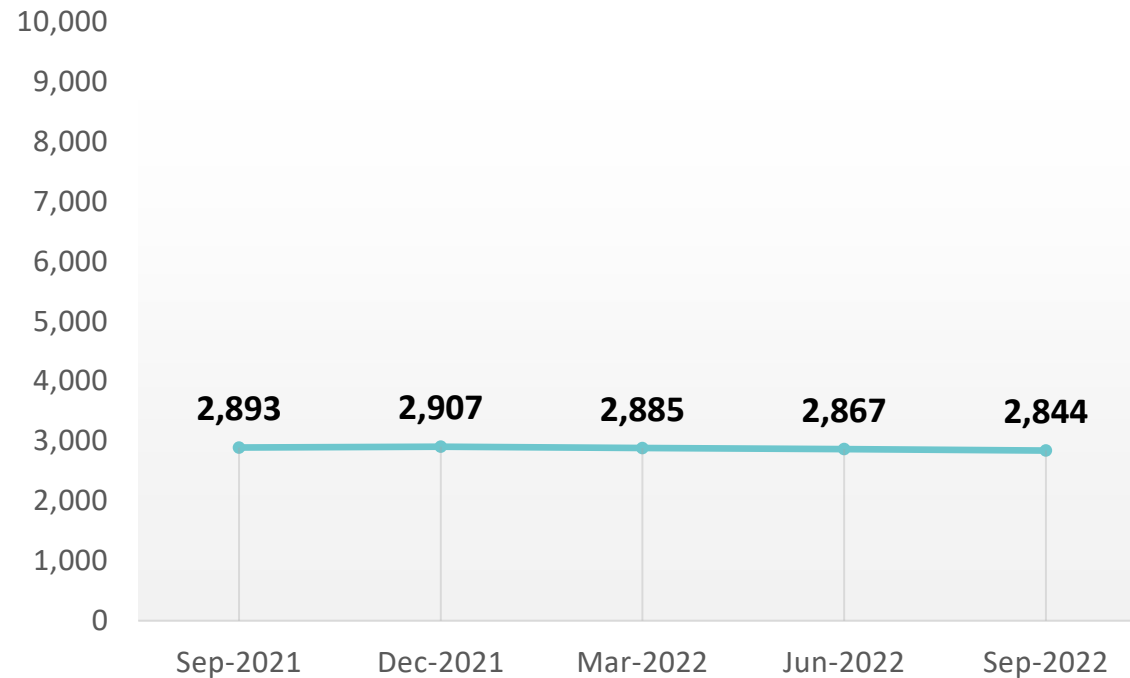
-1.7%



Q-o-Q
PERCENT
CHANGE

-0.8%

HHI for Fixed Internet Services
from Q3 2021 to Q3 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
\$828

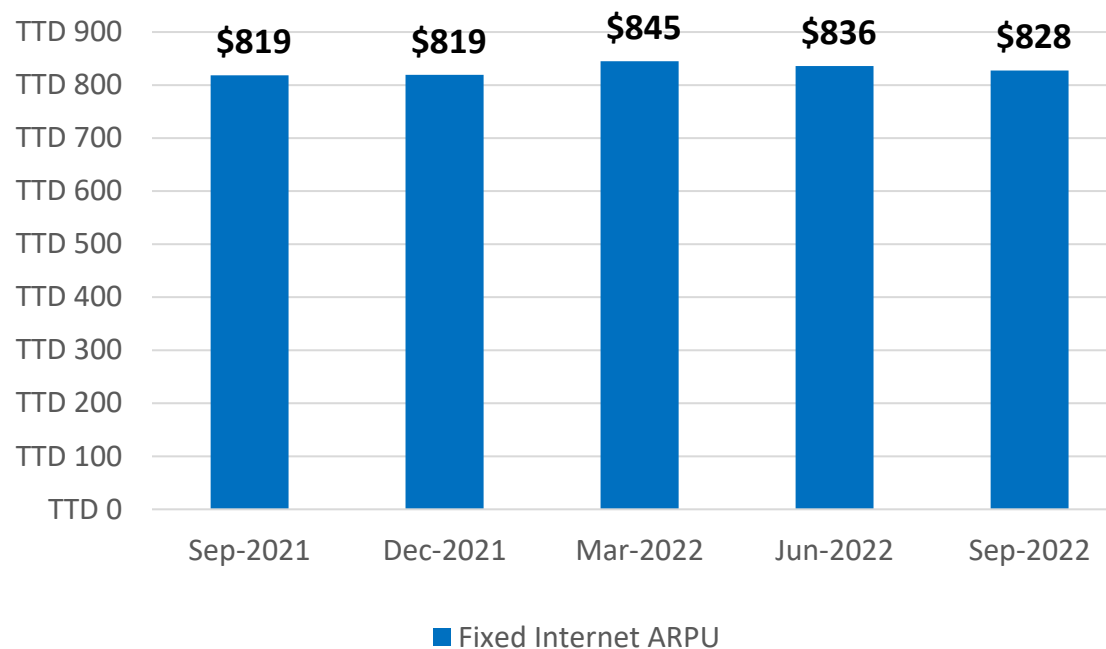


Y-o-Y
PERCENT
CHANGE
1.1%



Q-o-Q
PERCENT
CHANGE
-1.0%

ARPU for Fixed Internet Services
from Q3 2021 to Q3 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

227,700



Y-o-Y
PERCENT
CHANGE

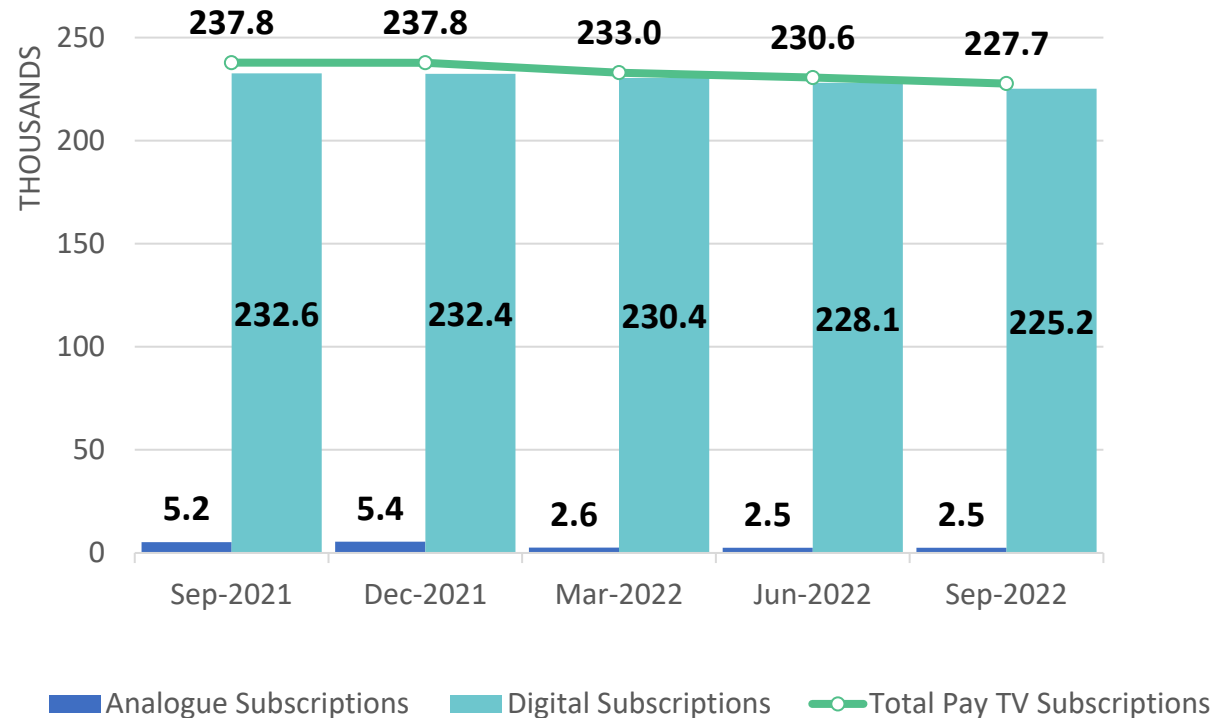
-4.3%



Q-o-Q
PERCENT
CHANGE

-1.3%

Number of Pay TV Subscriptions
from Q3 2021 to Q3 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**

16.5



**Y-o-Y
PERCENT
CHANGE**

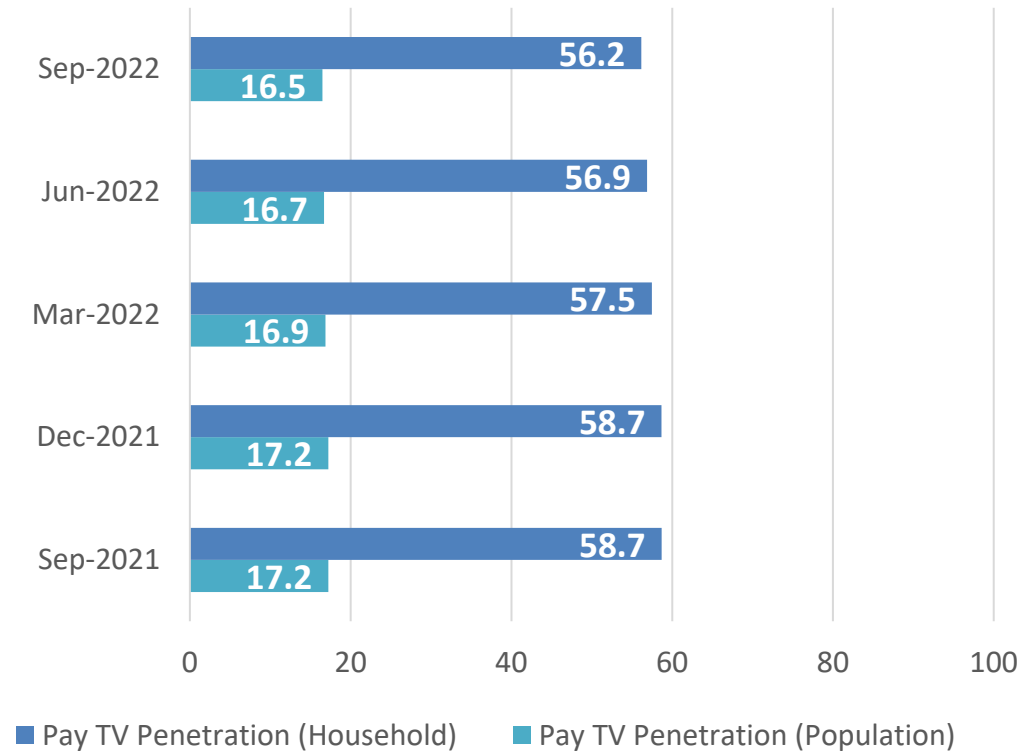
-4.1%



**Q-o-Q
PERCENT
CHANGE**

-1.2%

Penetration Rates of Pay TV Services
from Q3 2021 to Q3 2022



**PAY TV
PENETRATION
PER 100
HOUSEHOLDS**

56.2



**Y-O-Y
PERCENT
CHANGE**

-4.3%



**Q-O-Q
PERCENT
CHANGE**

-1.2%

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

Pay TV Revenues



GROSS REVENUES

\$158m



Y-o-Y PERCENT CHANGE

-3.1%



Q-o-Q PERCENT CHANGE

0.6%

Gross Revenues from Pay TV Services from Q3 2021 to Q3 2022



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

Pay TV HHI



HHI
3,402



Y-o-Y
PERCENT
CHANGE
2.6%



Q-o-Q
PERCENT
CHANGE
0.1%

HHI for Pay TV Services
from Q3 2021 to Q3 2022



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

Pay TV

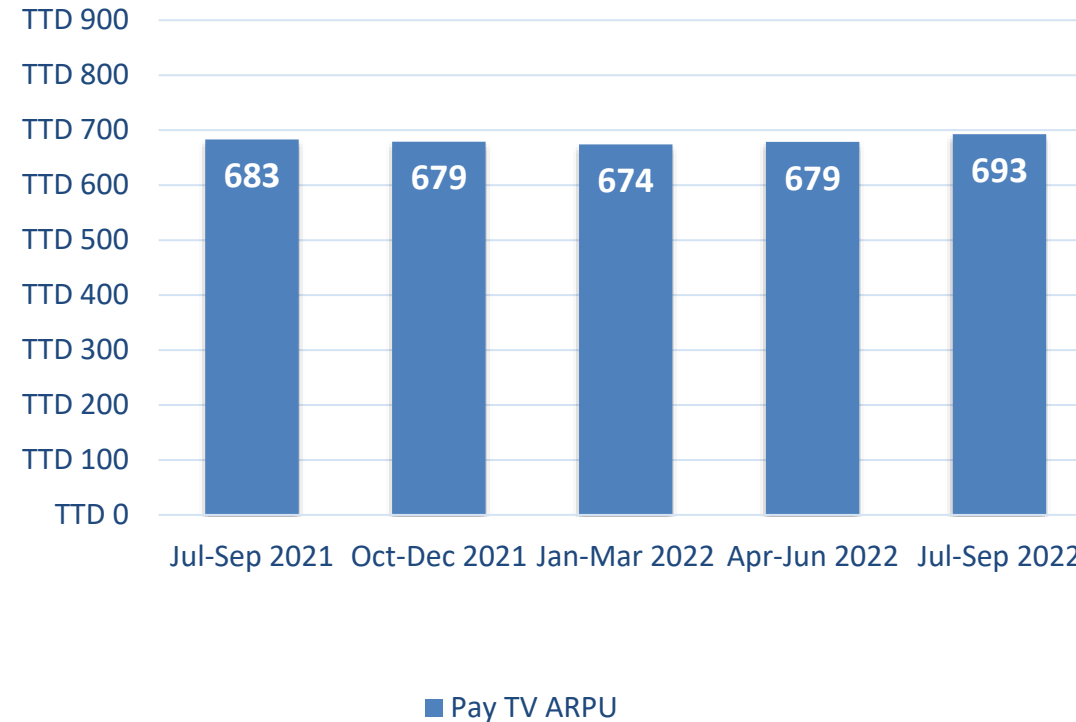
Average Revenue Per User

ARPU
\$ **\$693**

Y-o-Y
PERCENT
CHANGE
1.5%

Q-o-Q
PERCENT
CHANGE
2.1%

ARPU for Pay TV Services
from Q3 2021 to Q3 2022

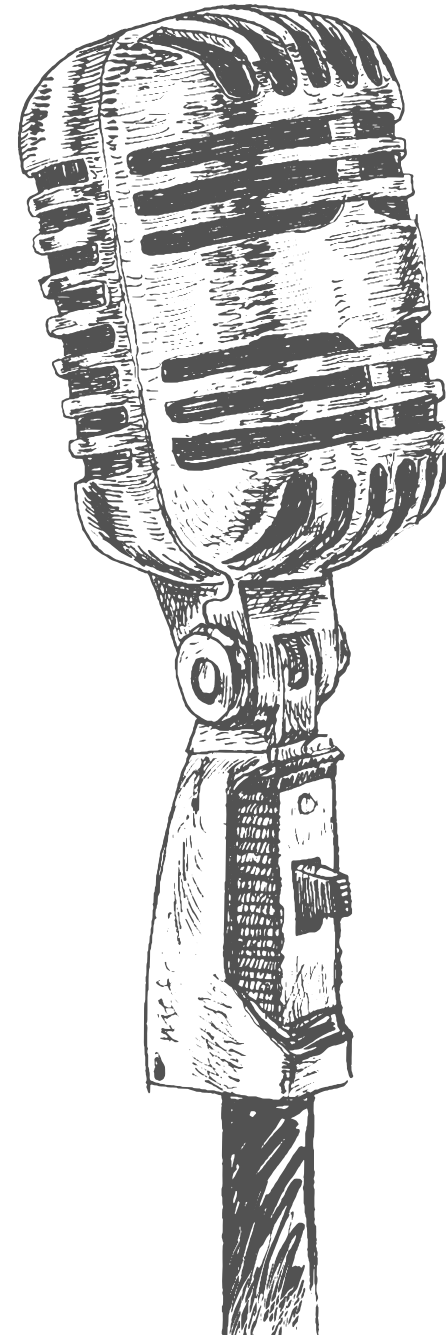


** Data estimated for the following concessionaires who had not submitted data at the date of publication: Greendot Limited*

Free-to-Air Radio

1/6/2023

TATT: 2/10/1/3



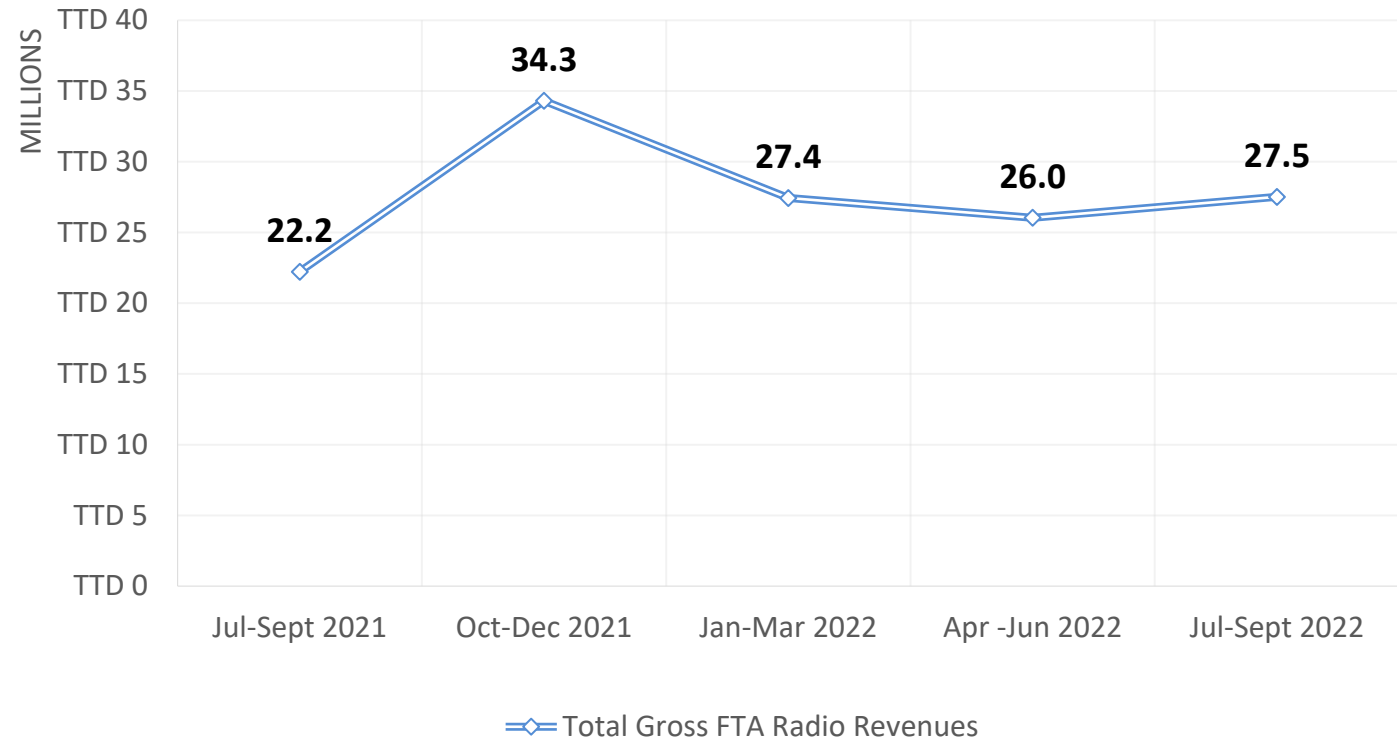
Free-to-Air Radio Revenues

\$
GROSS REVENUES
\$27.5m

%
Y-o-Y PERCENT CHANGE
23.9%

%
Q-o-Q PERCENT CHANGE
5.8%

Gross Revenues from Free to Air Radio Services from Q3 2021 To Q3 2022



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

Free-to-Air Radio HHI



HHI
428

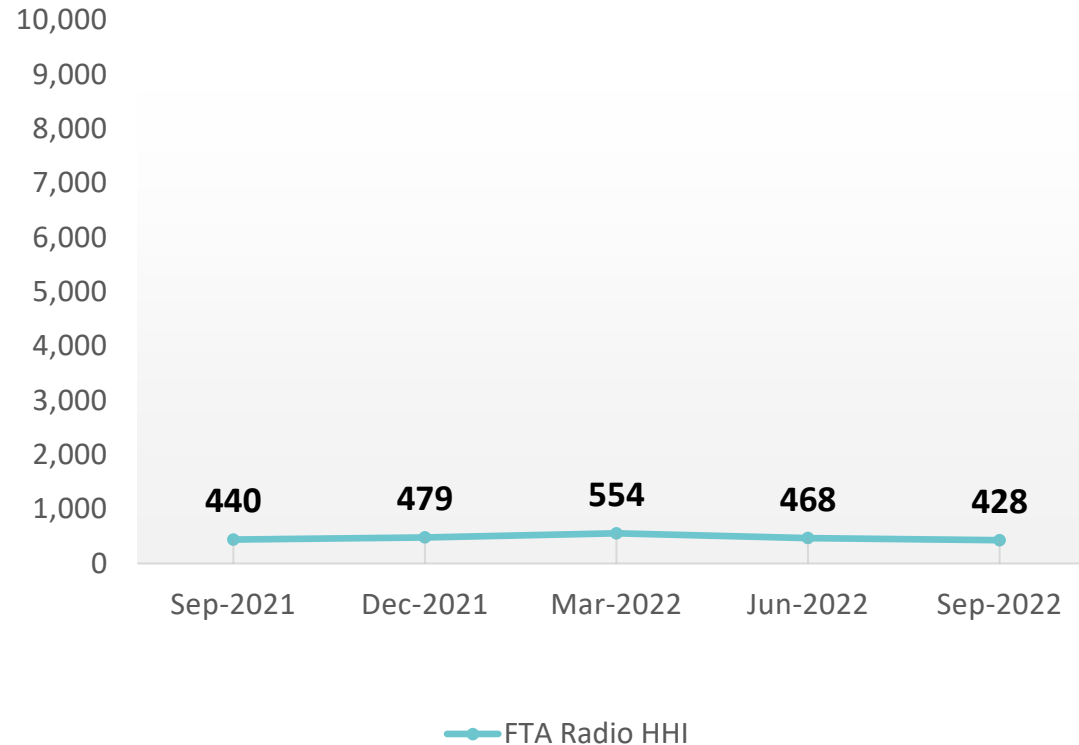


Y-o-Y
PERCENT
CHANGE
-2.7%



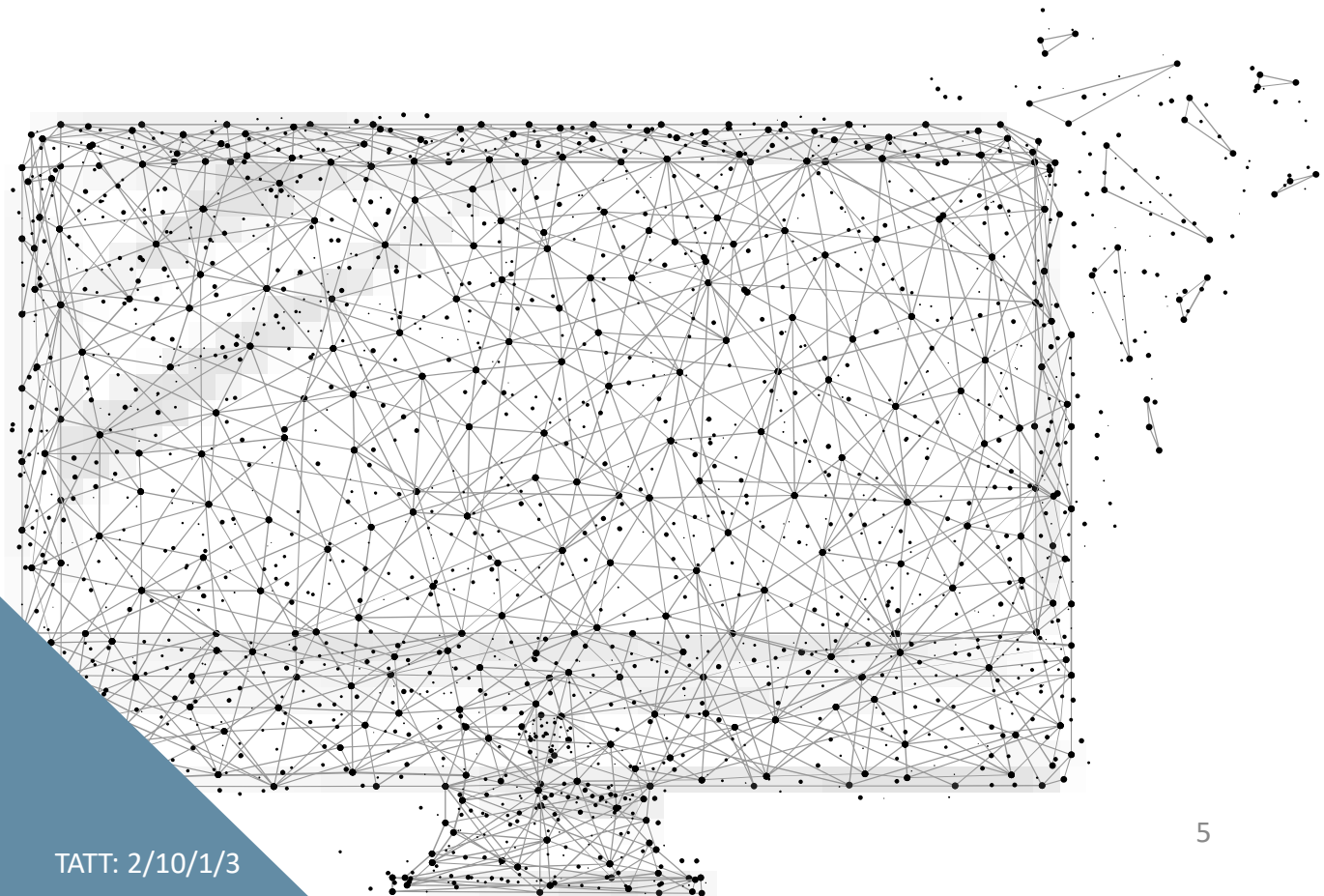
Q-o-Q
PERCENT
CHANGE
-8.6%

HHI For Free to Air Radio Services
from Q3 2021 To Q3 2022



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

Free-to-Air TV



Free-to-Air TV Revenues



GROSS REVENUES

\$13.6m



Y-o-Y PERCENT CHANGE

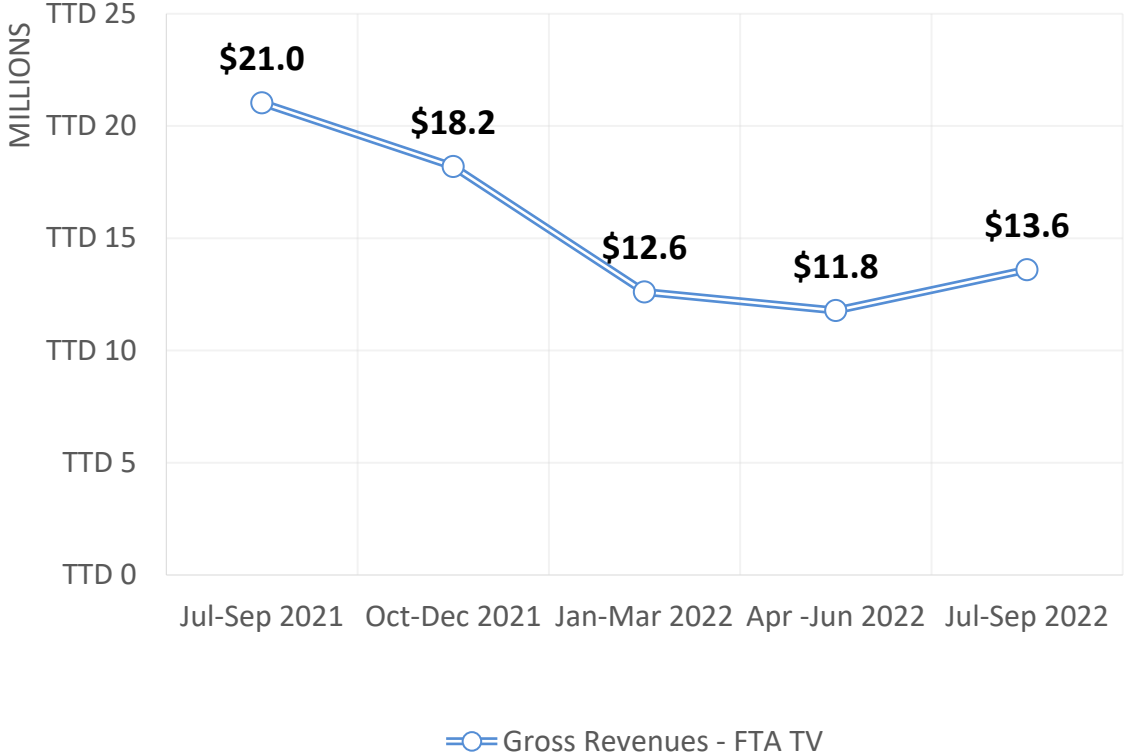
-35.2%



Q-o-Q PERCENT CHANGE

15.3%

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q3 2021 TO Q3 2022



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

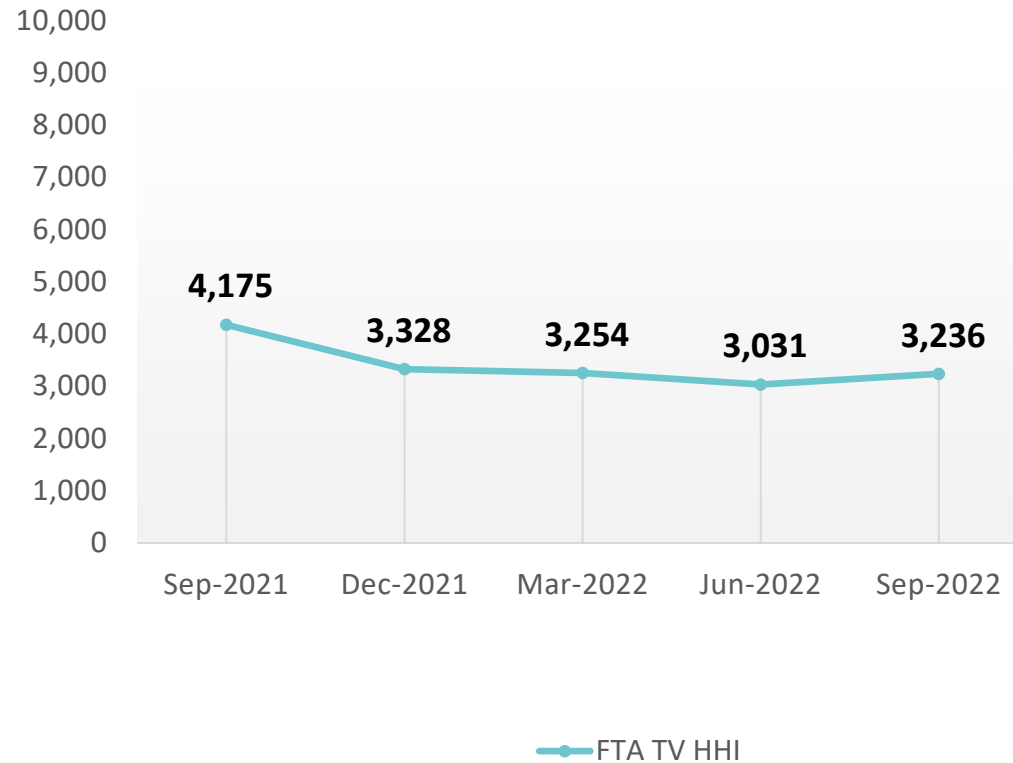
Free-to-Air TV HHI

HHI
3,236

Y-o-Y
PERCENT
CHANGE
-22.5%

Q-o-Q
PERCENT
CHANGE
6.8%

HHI for Free to Air TV Services
Q3 2021 to Q3 2022



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

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July to September 2022

