

QUARTERLY MARKET UPDATE

October to December 2022



Quarterly Market Update – Q4 2022

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Free-to-Air TV Market

Notes

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

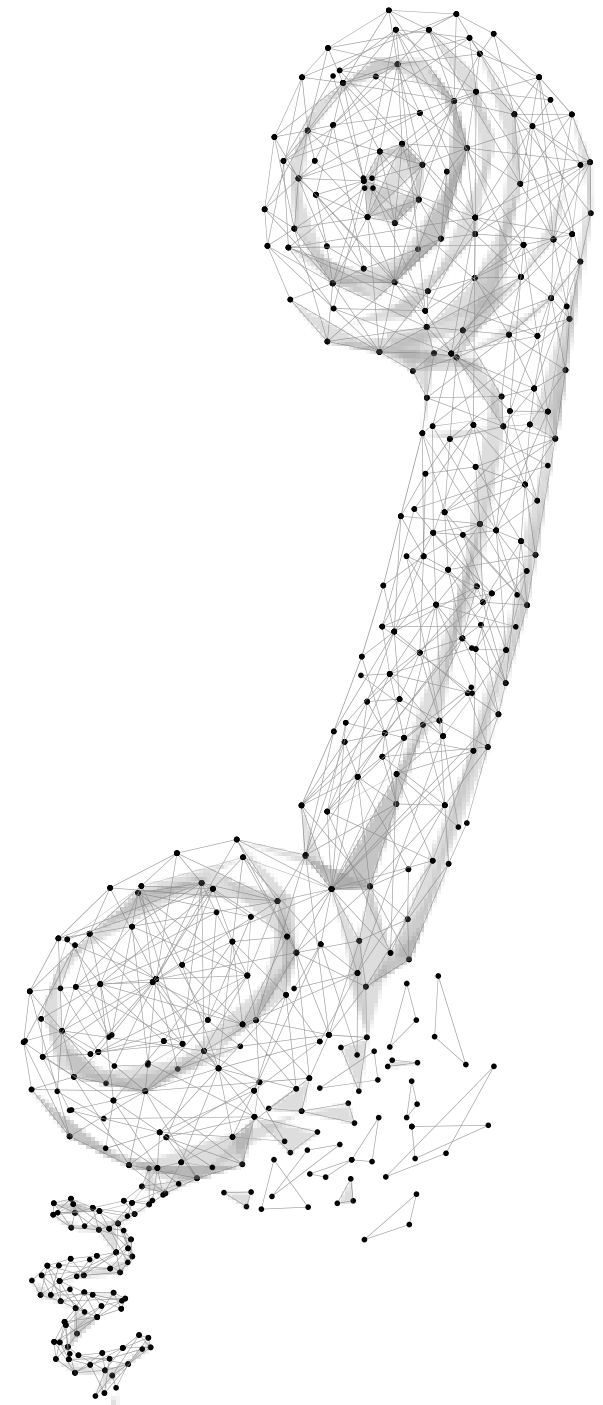
- 2. Penetration rates have been calculated using the following population figures:**
 - a) 1,365,805 (2022 Mid-year population estimate, Central Statistical Office)**

 - b) Number of households - 401,382 (Trinidad and Tobago 2011 Population and Housing Census Demographic Report, Central Statistical Office)**

Fixed Voice

4/11/2023

TATT: 2/10/1/3



Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

326,000



Y-o-Y PERCENT CHANGE

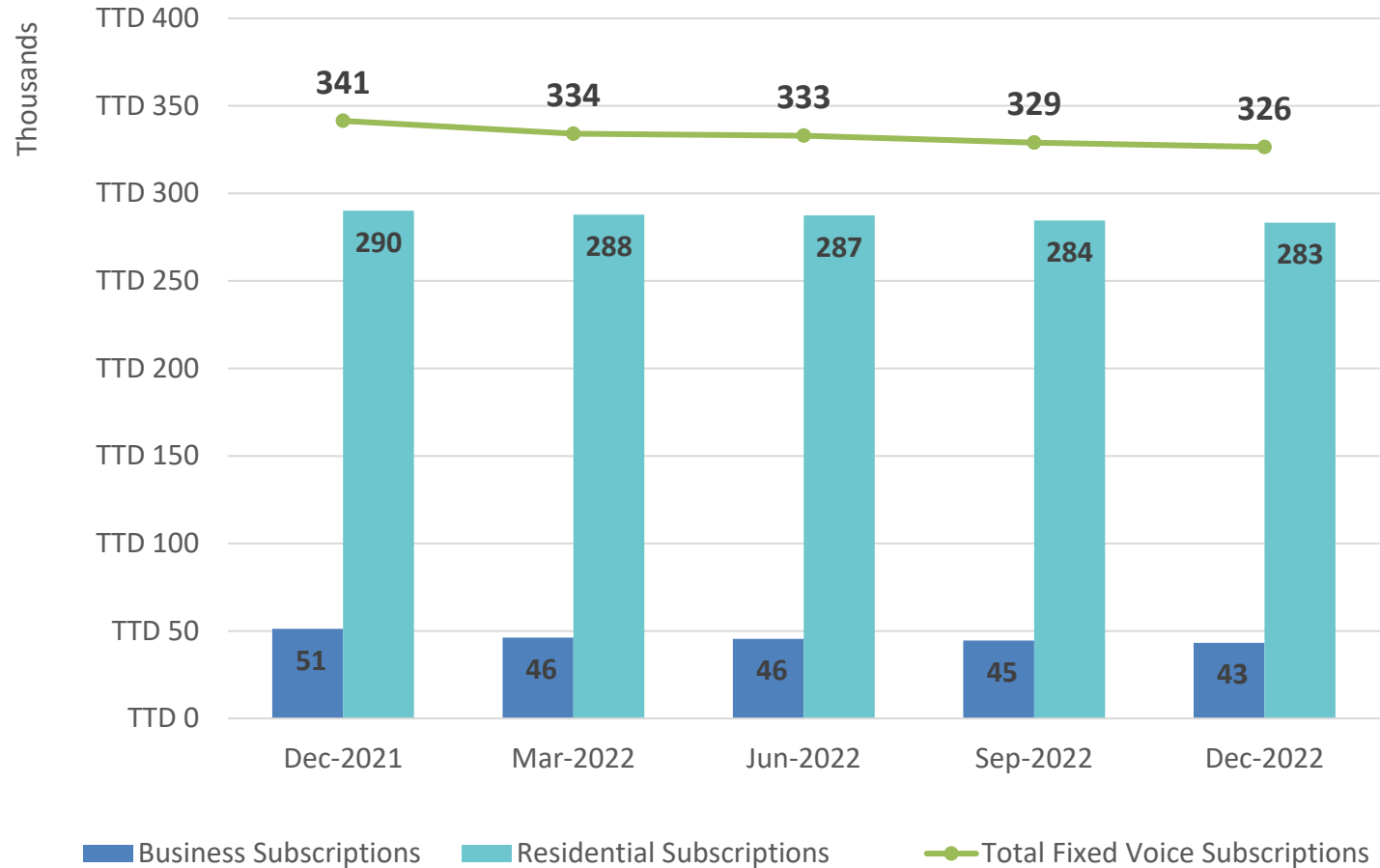
-4.4%



Q-o-Q PERCENT CHANGE

-0.9%

Number of Fixed Line Subscriptions
Q4 2021 to Q4 2022



Fixed Voice Penetration



**FIXED VOICE
PENETRATION PER
100 INHABITANTS**

23.9



**Y-o-Y
PERCENT
CHANGE**

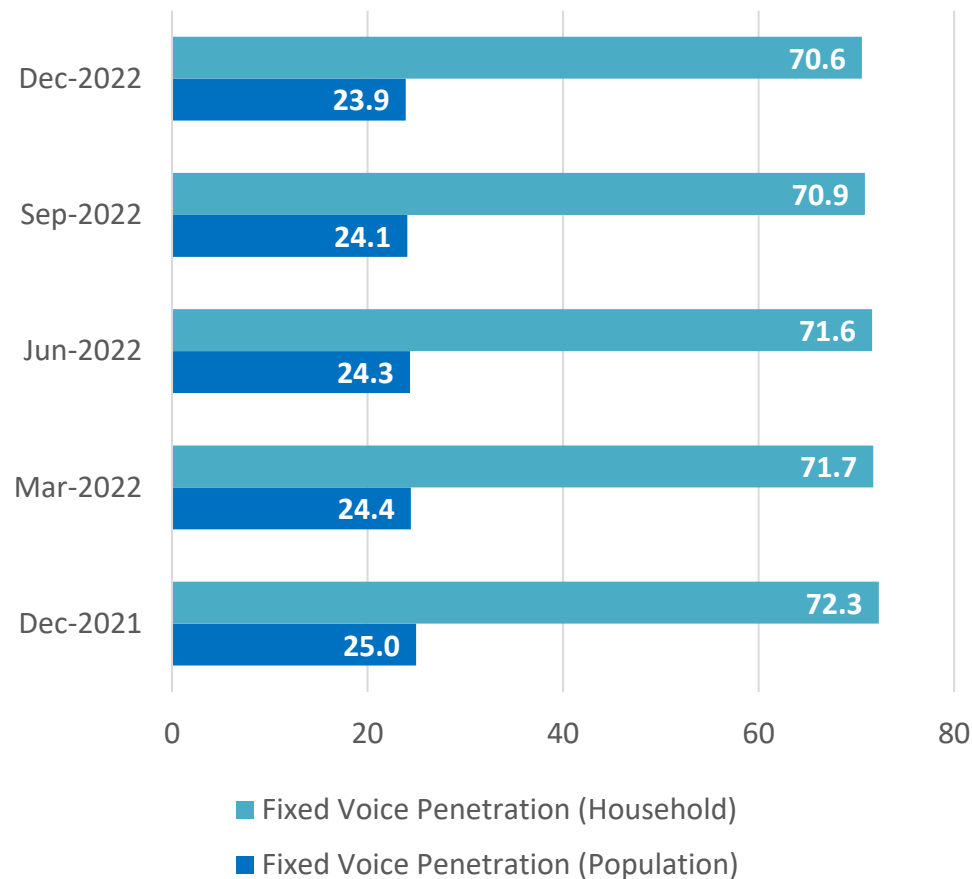
-4.4%



**Q-o-Q
PERCENT
CHANGE**

-0.6%

Penetration Rate of Fixed Line Subscriptions
from Q4 2021 to Q4 2022



**FIXED LINE
PENETRATION PER
100 HOUSEHOLDS**

70.6



**Y-o-Y
PERCENT
CHANGE**

-2.4%



**Q-o-Q
PERCENT
CHANGE**

-0.4%

Fixed Voice Revenues



GROSS REVENUES

\$81.2m



Y-o-Y PERCENT CHANGE

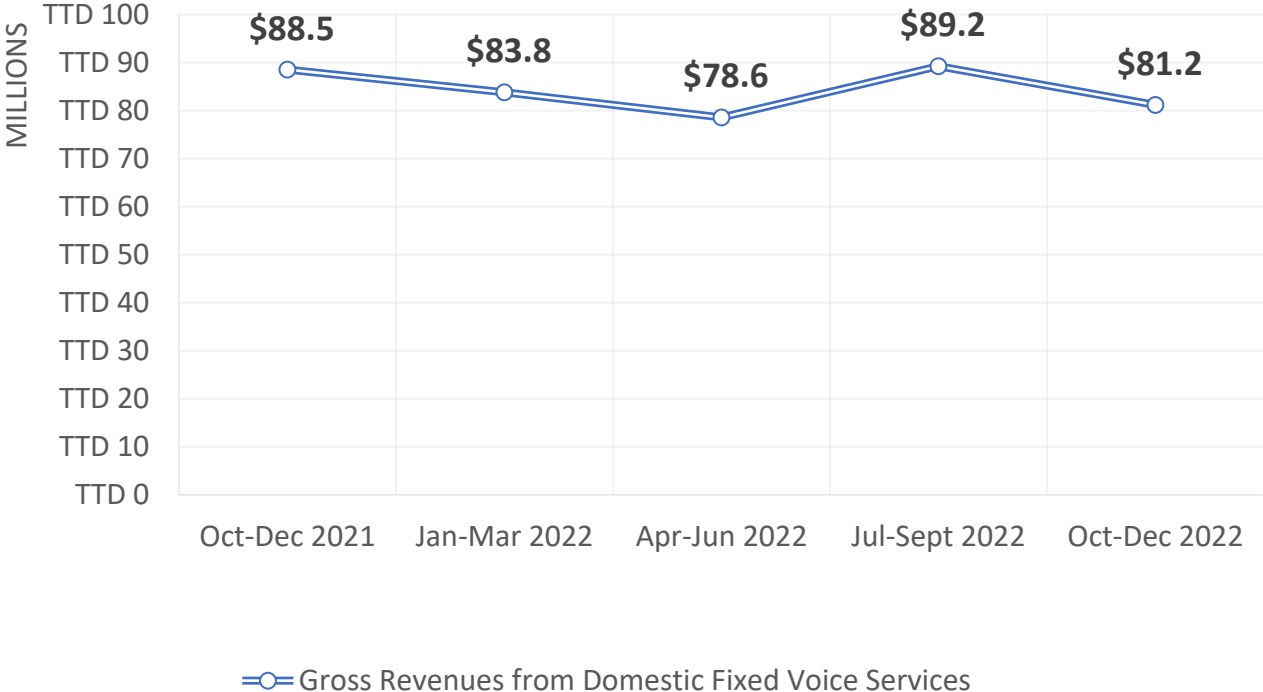
-8.3%



Q-o-Q PERCENT CHANGE

-8.9%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q4 2021 TO Q4 2022



Fixed Voice HHI



HHI

3,377



Y-o-Y
PERCENT
CHANGE

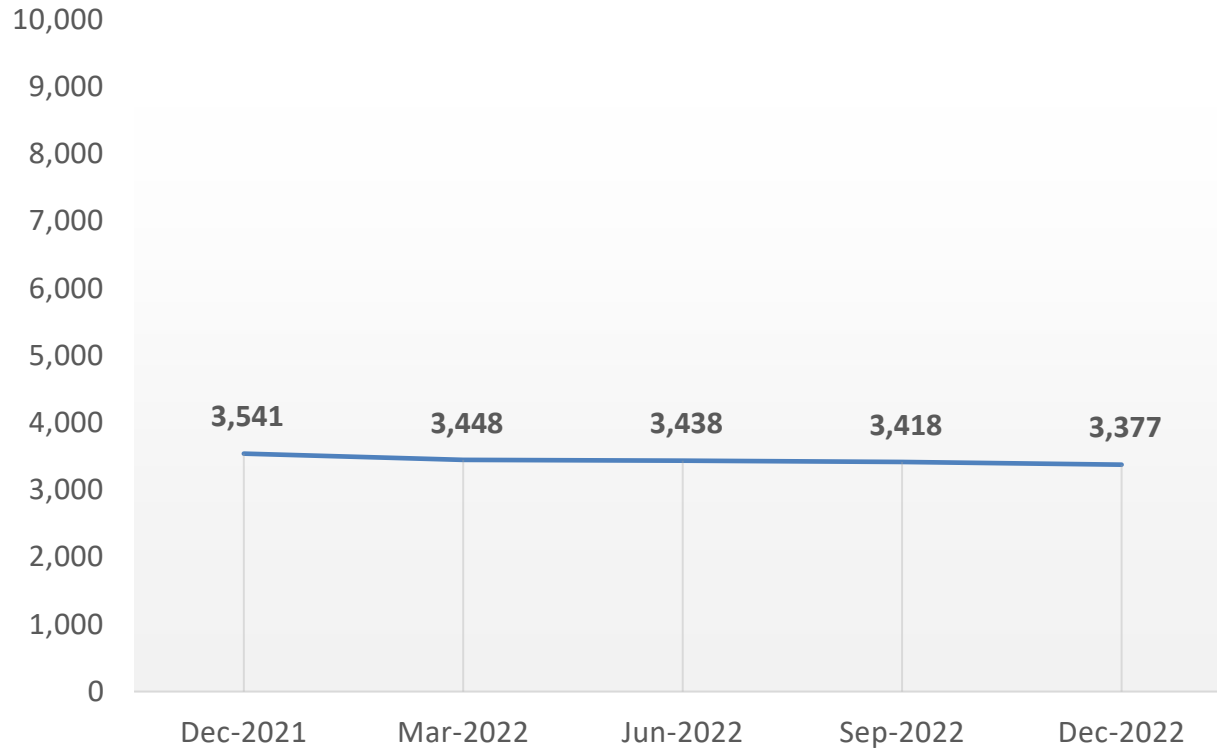
-4.6%



Q-o-Q
PERCENT
CHANGE

-1.2%

HHI for Domestic Fixed Line
from Q4 2021 to Q4 2022



Fixed Voice Average Revenue Per User



ARPU
\$248

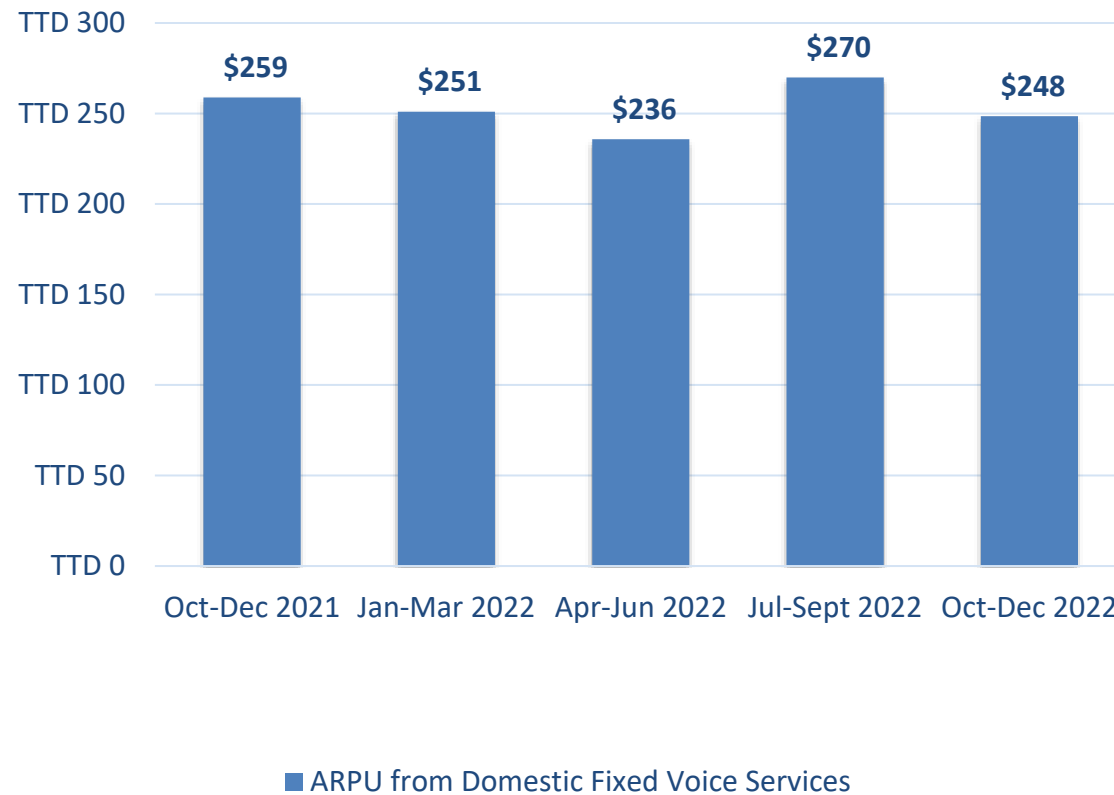


Y-o-Y
PERCENT
CHANGE
-4.3%



Q-o-Q
PERCENT
CHANGE
-8.2%

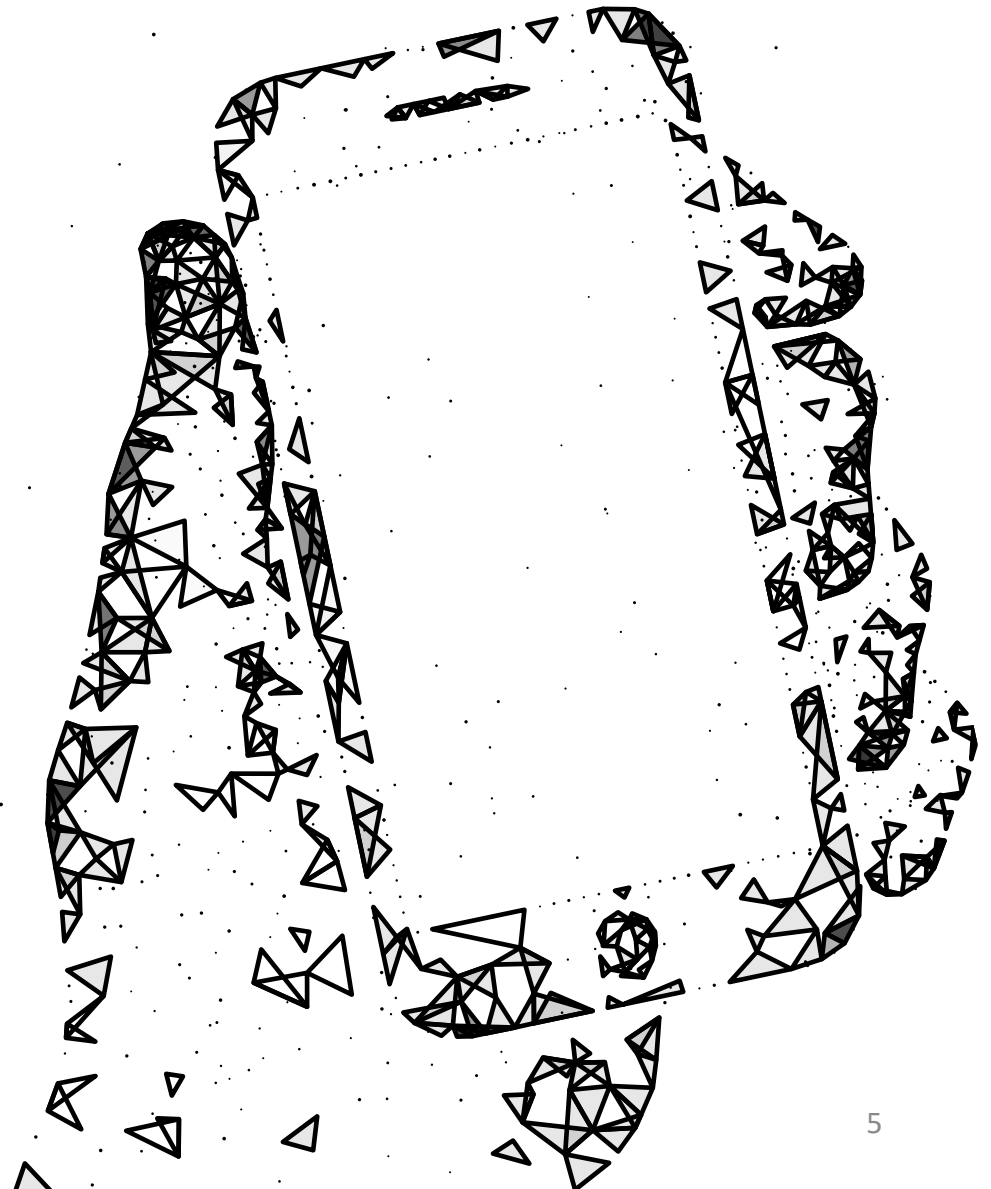
ARPU from Domestic Fixed Voice Services
from Q4 2021 to Q4 2022



Mobile Voice

4/11/2023

TATT: 2/10/1/3



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,999,000



Y-o-Y PERCENT CHANGE

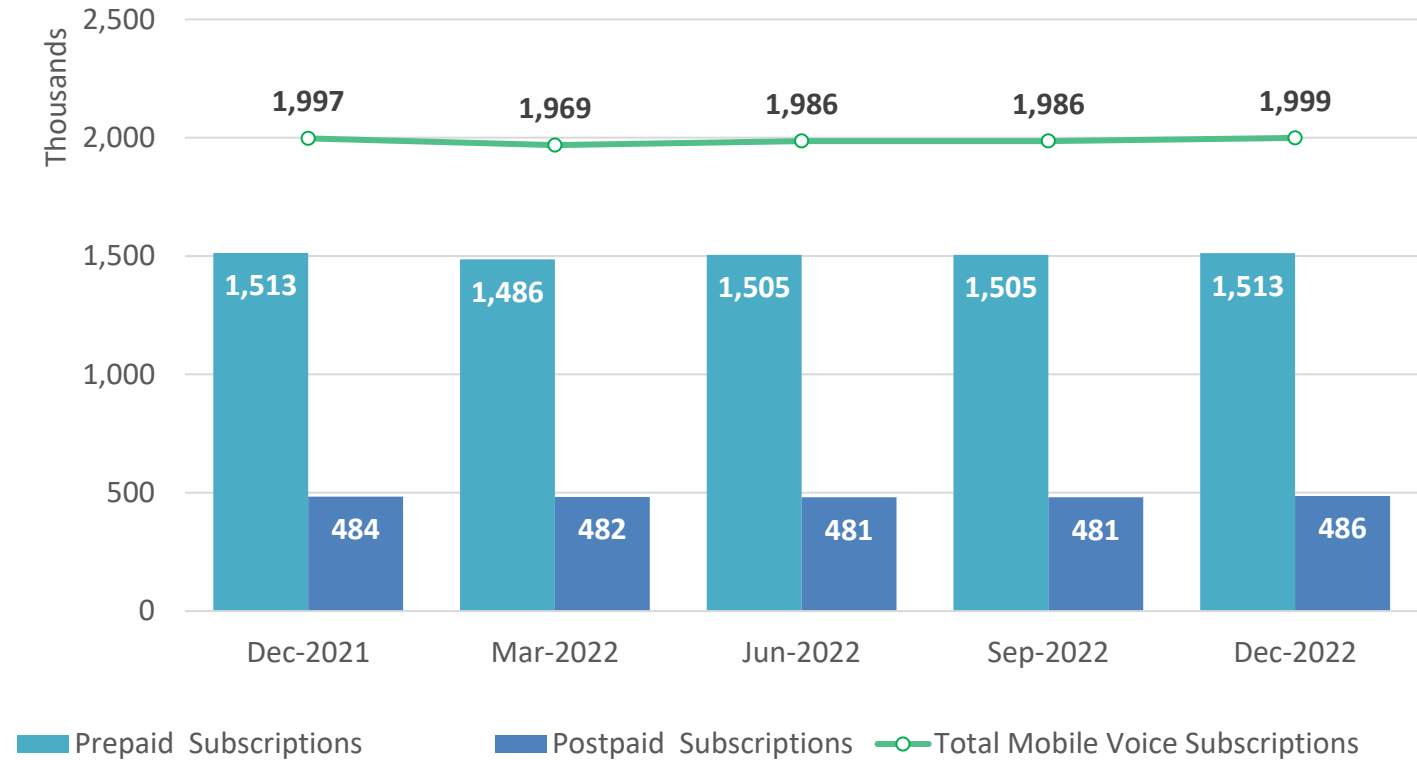
0.1%



Q-o-Q PERCENT CHANGE

0.7%

Number of Mobile Voice Subscriptions from Q4 2021 to Q4 2022



Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

146



**Y-o-Y
PERCENT
CHANGE**

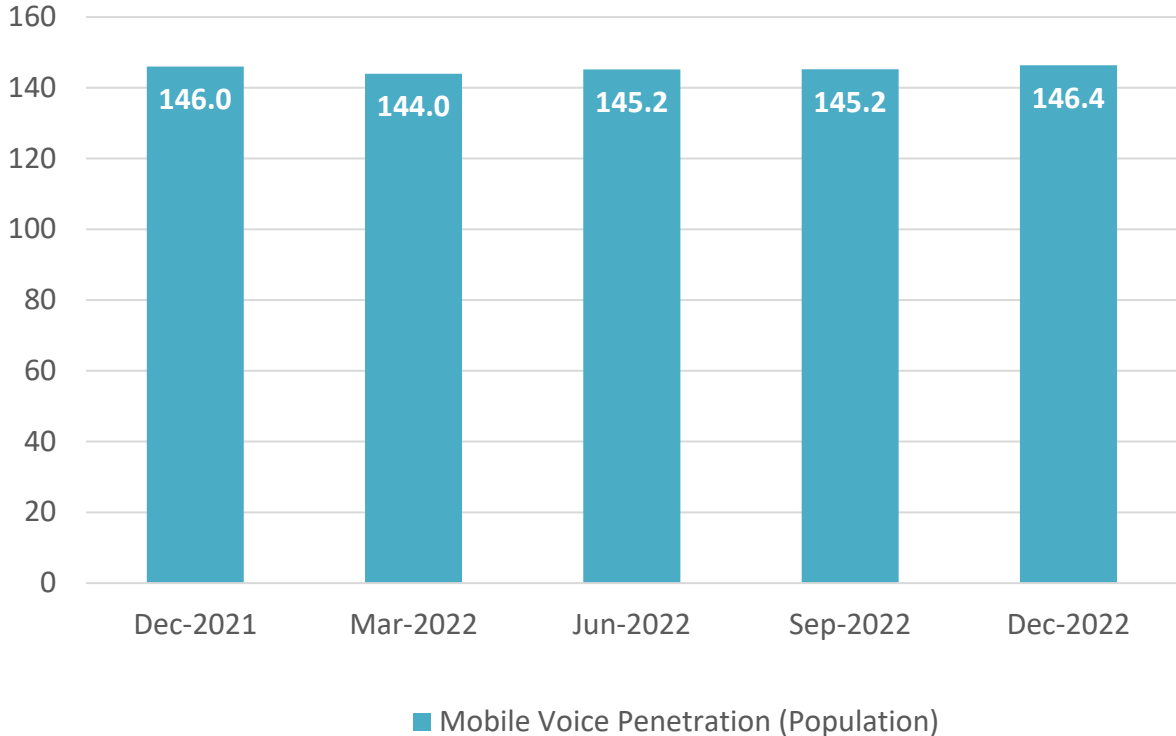
0.3%



**Q-o-Q
PERCENT
CHANGE**

0.8%

Penetration of Mobile Voice Subscriptions
from Q4 2021 to Q4 2022



Mobile Services Revenues



GROSS REVENUES

\$ 494.9m



Y-o-Y PERCENT CHANGE

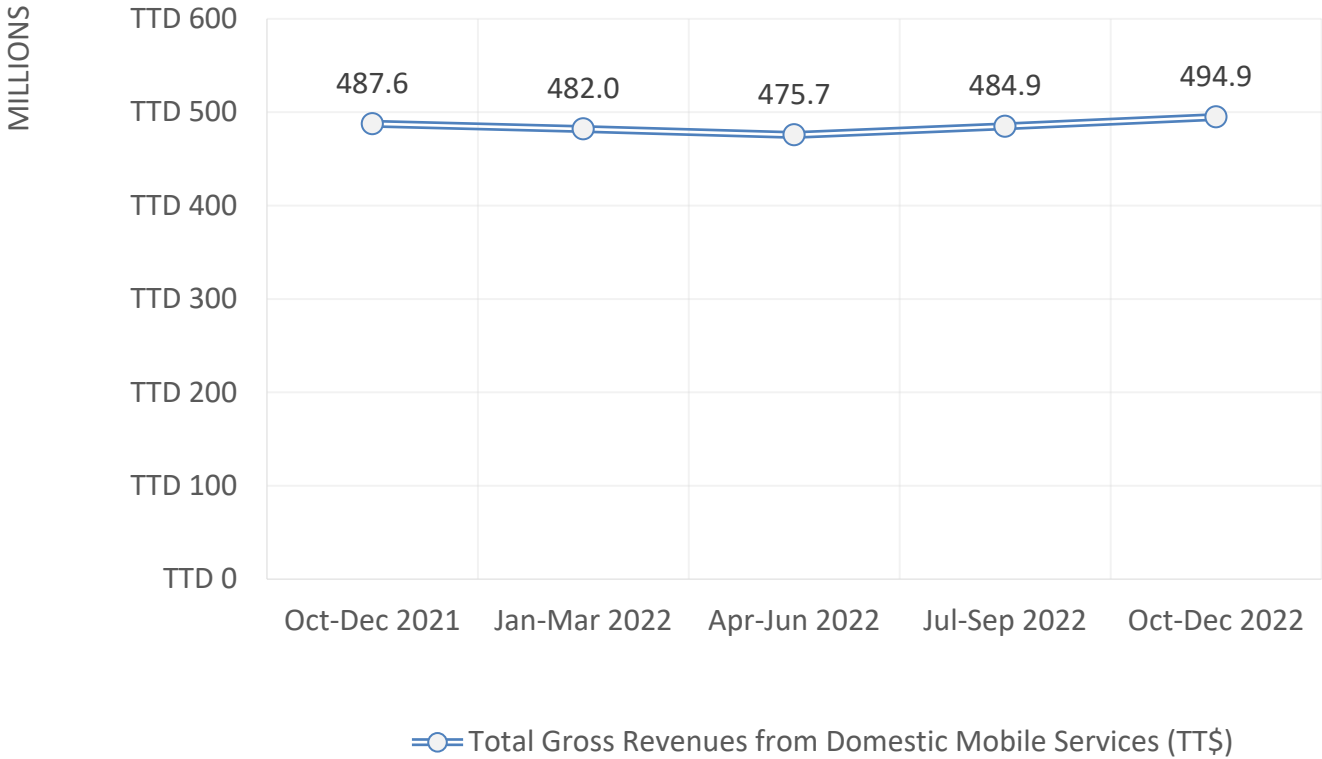
1.5%



Q-o-Q PERCENT CHANGE

2.1%

**TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$)
FROM Q4 2021 TO Q4 2022**



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,196



Y-o-Y
PERCENT
CHANGE

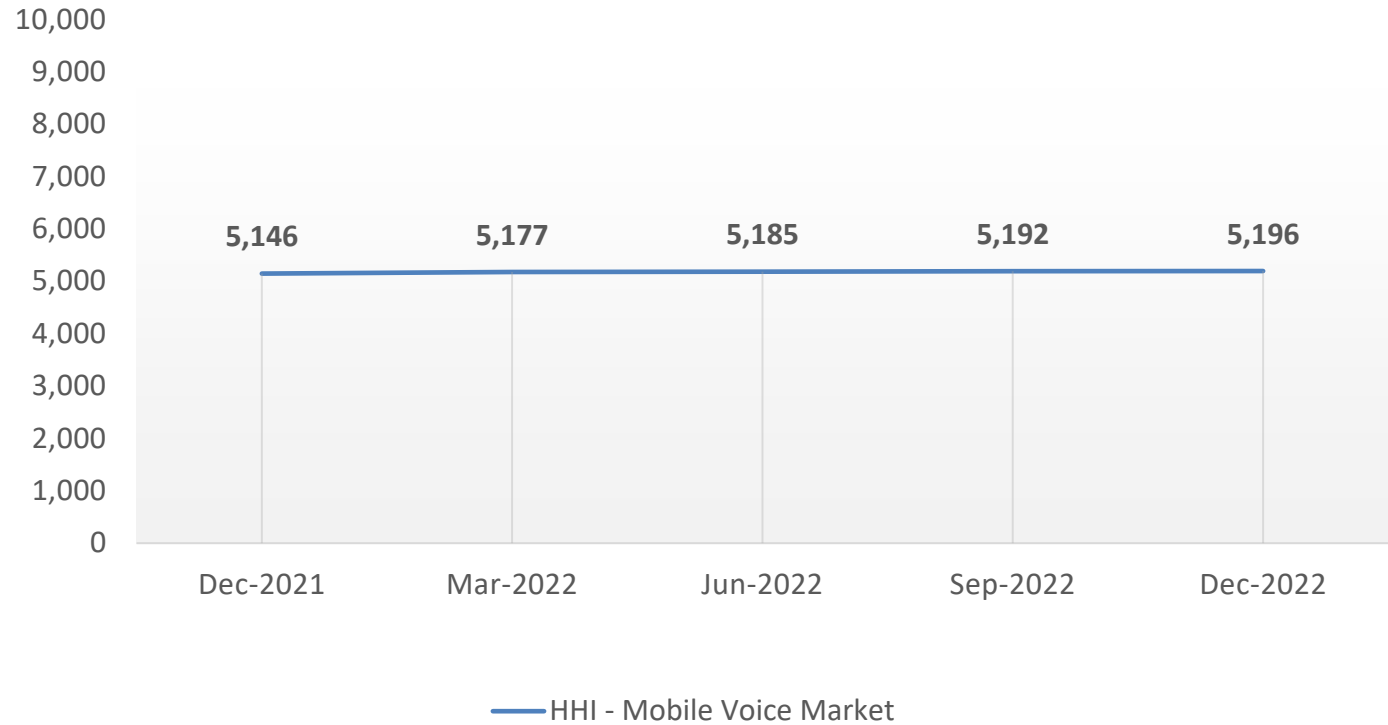
1.0%



Q-o-Q
PERCENT
CHANGE

0.1%

HHI for Domestic Mobile Services
from Q4 2021 to Q4 2022



Average Revenue Per User

Mobile Services



ARPU
\$249



Y-o-Y
PERCENT
CHANGE

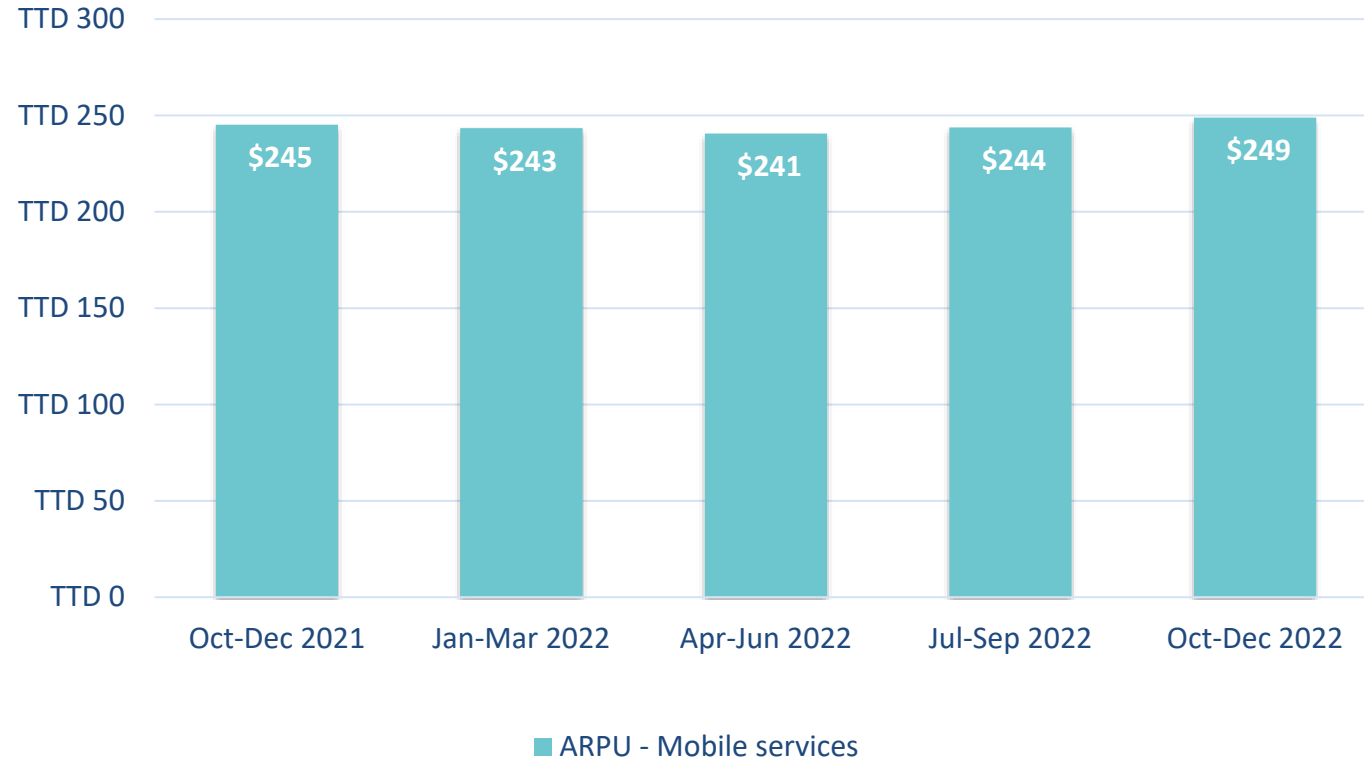
1.6%



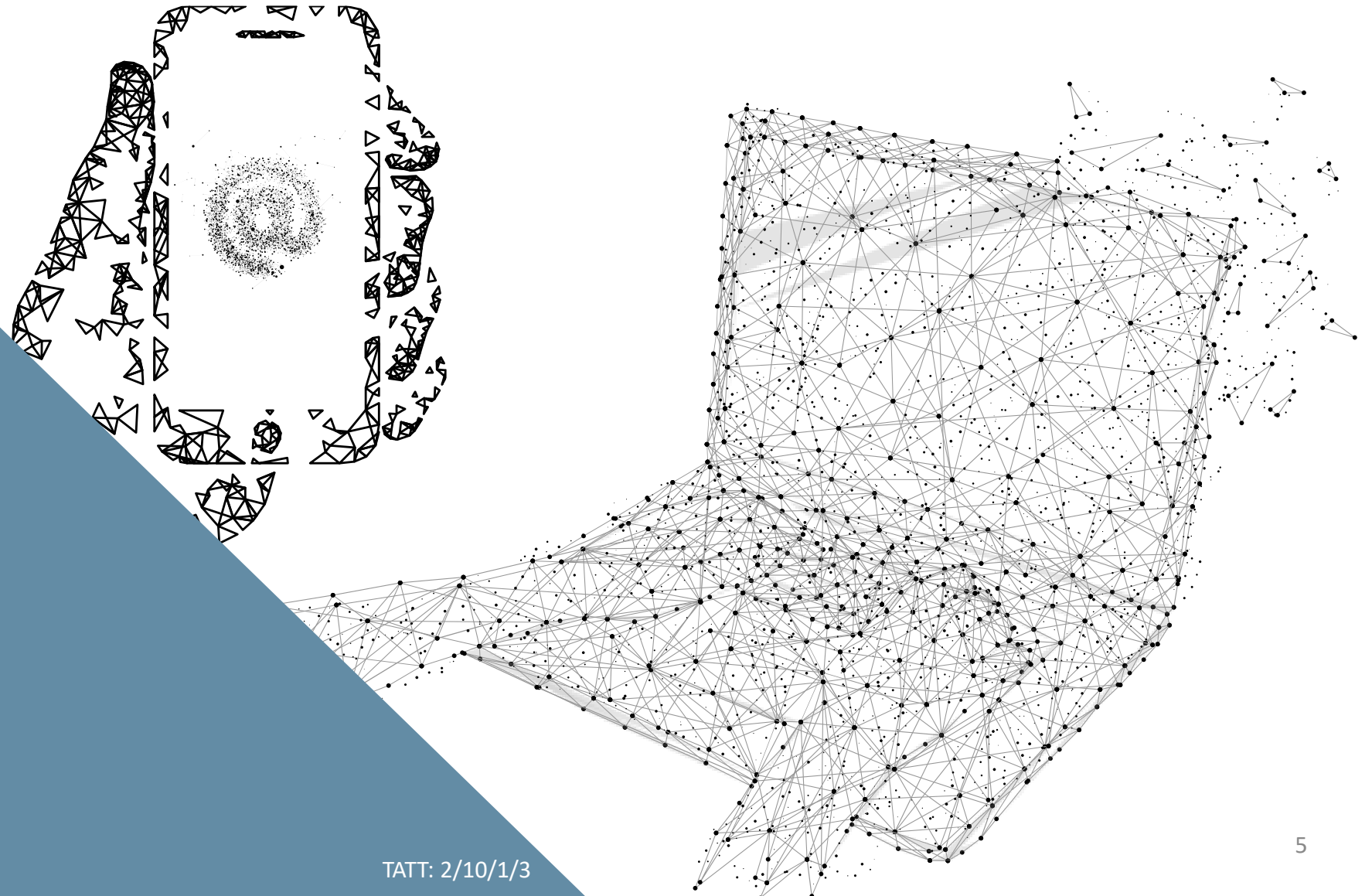
Q-o-Q
PERCENT
CHANGE

2.1%

ARPU for Domestic Mobile Services
from Q4 2021 to Q4 2022



Internet



Fixed Broadband Subscriptions



TOTAL NUMBER OF
SUBSCRIPTIONS

373,400



Y-o-Y
PERCENT
CHANGE

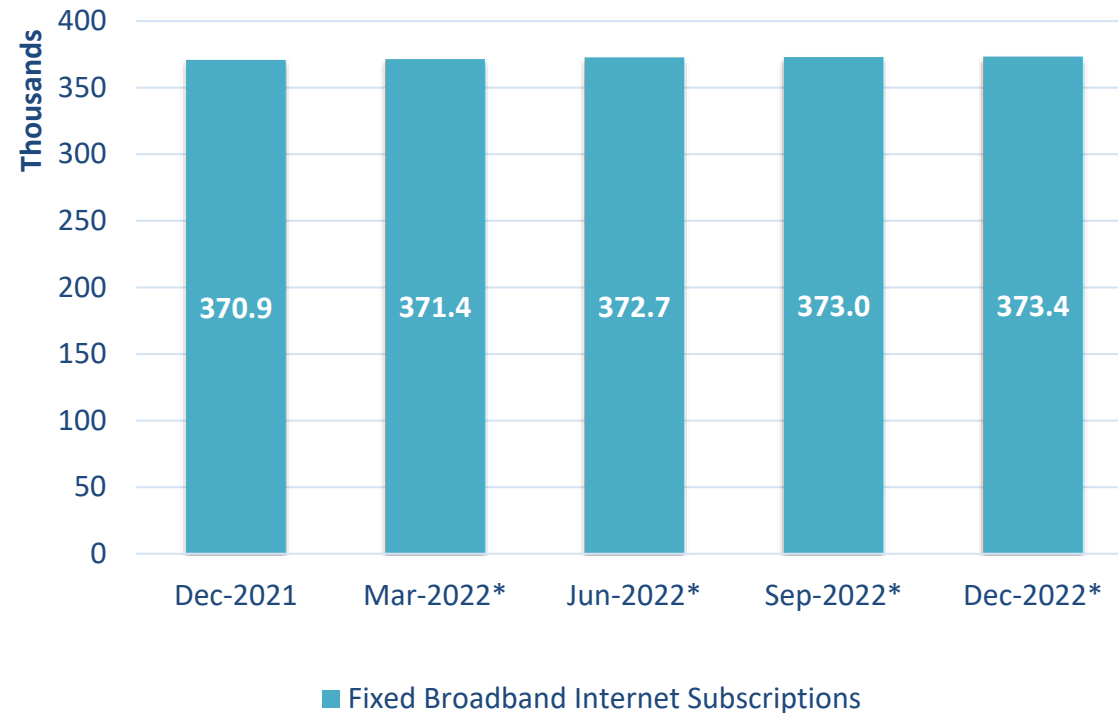
0.7%



Q-o-Q
PERCENT
CHANGE

0.1%

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

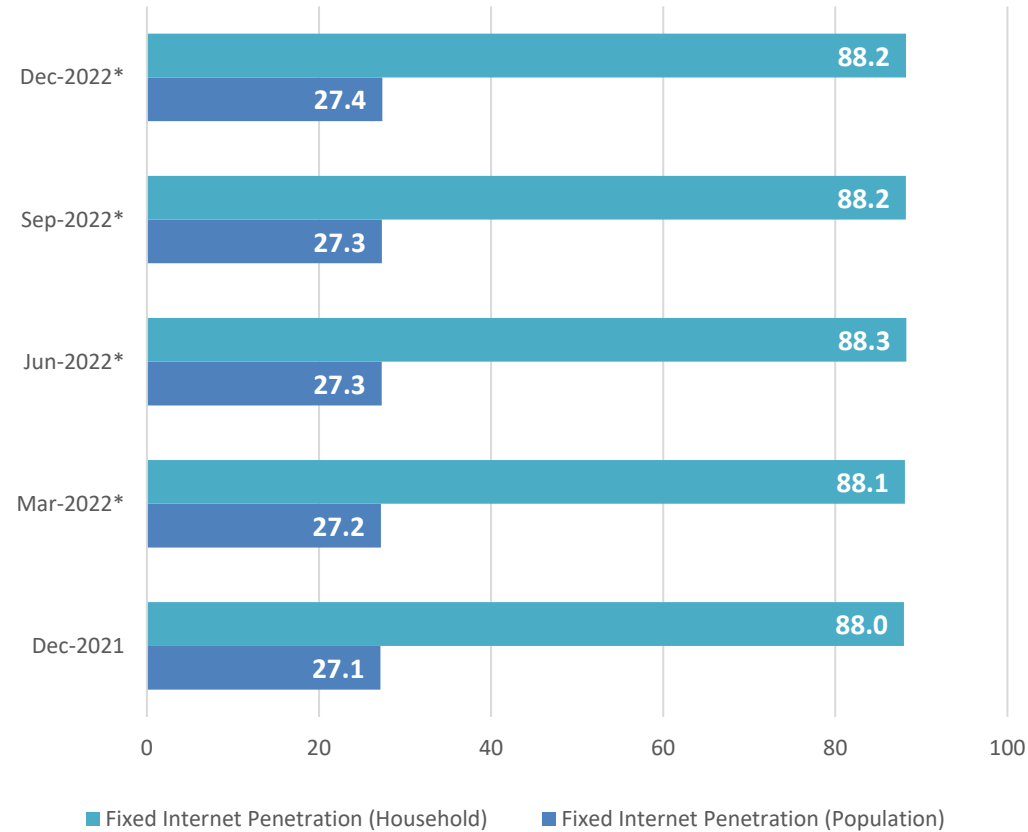
1.1%



**Q-o-Q
PERCENT
CHANGE**

0.4%

Penetration for Fixed Internet Subscriptions
from Q4 2021 to Q4 2022



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

88



**Y-O-Y
PERCENT
CHANGE**

0.3%

**Q-O-Q
PERCENT
CHANGE**

0%

** 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**

63



**Y-o-Y
PERCENT
CHANGE**

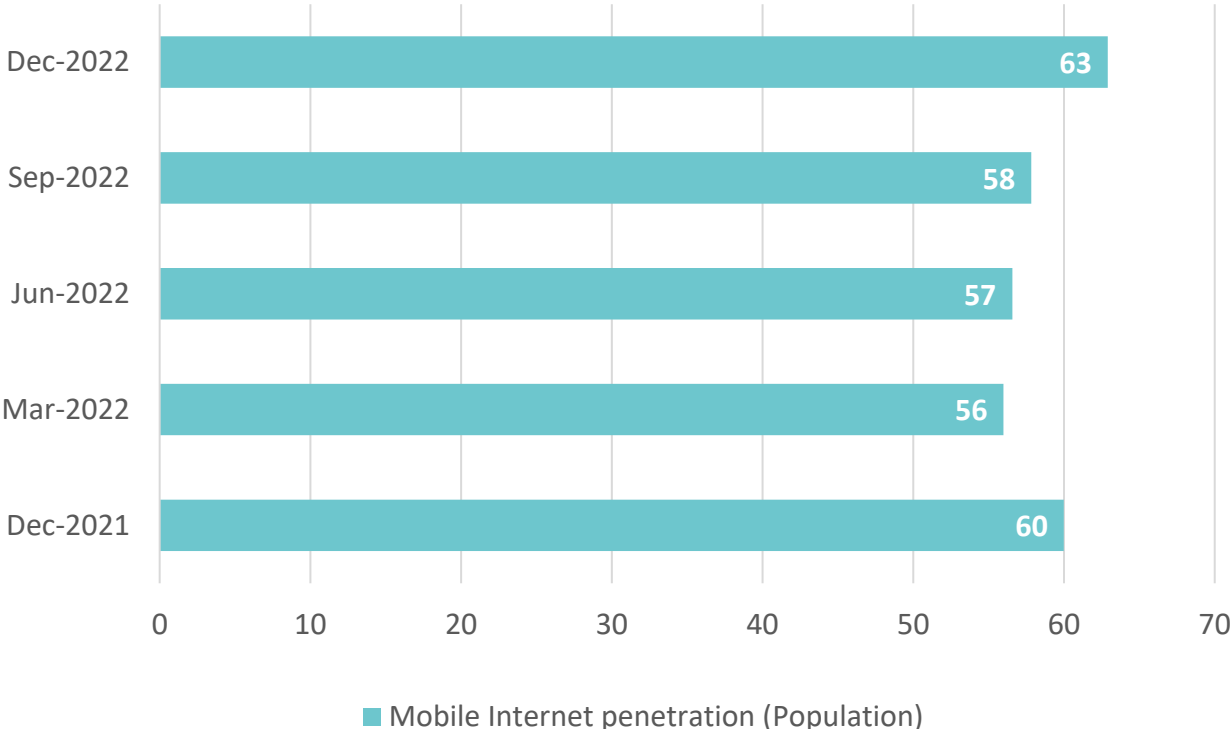
5.0%



**Q-o-Q
PERCENT
CHANGE**

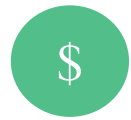
8.6%

Penetration for Mobile Internet Subscriptions
from Q4 2021 to Q4 2022



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

Fixed Internet Revenues



GROSS REVENUES
\$ 312.8m

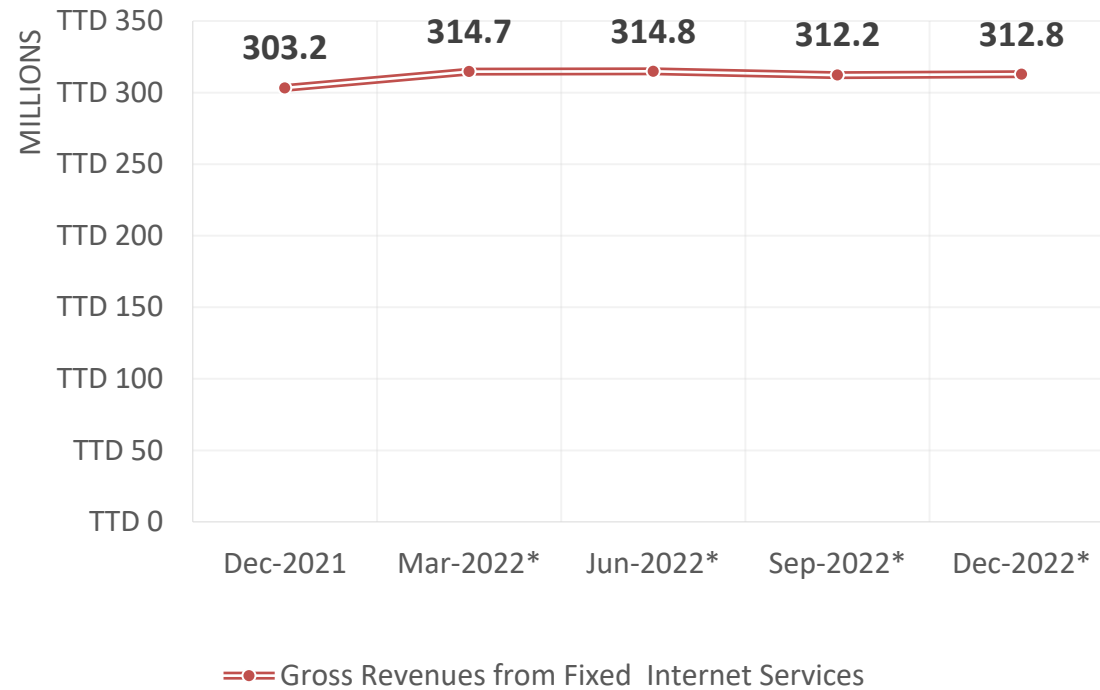


Y-o-Y
PERCENT
CHANGE
3.2%



Q-o-Q
PERCENT
CHANGE
0.2%

GROSS REVENUES FROM FIXED INTERNET SERVICES
FROM Q4 2021 TO Q4 2022



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

Fixed Internet HHI



HHI
2,819



Y-o-Y
PERCENT
CHANGE

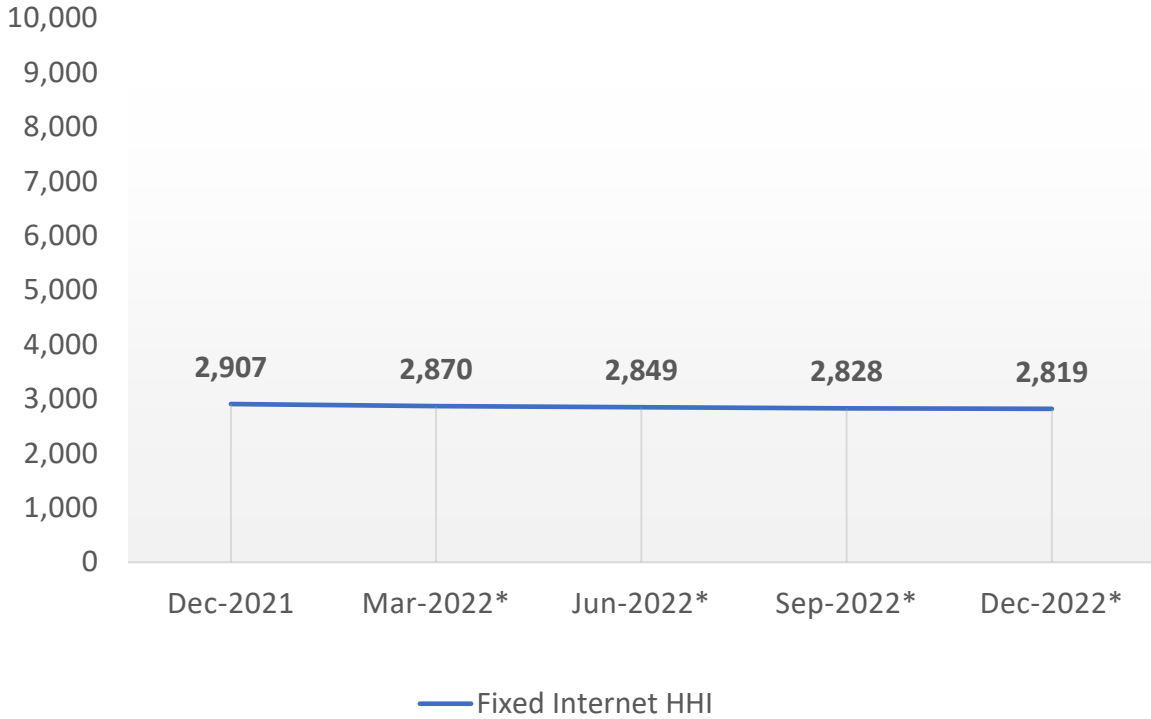
-3.0%



Q-o-Q
PERCENT
CHANGE

-0.3%

HHI for Fixed Internet Services
from Q4 2021 to Q4 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
\$838

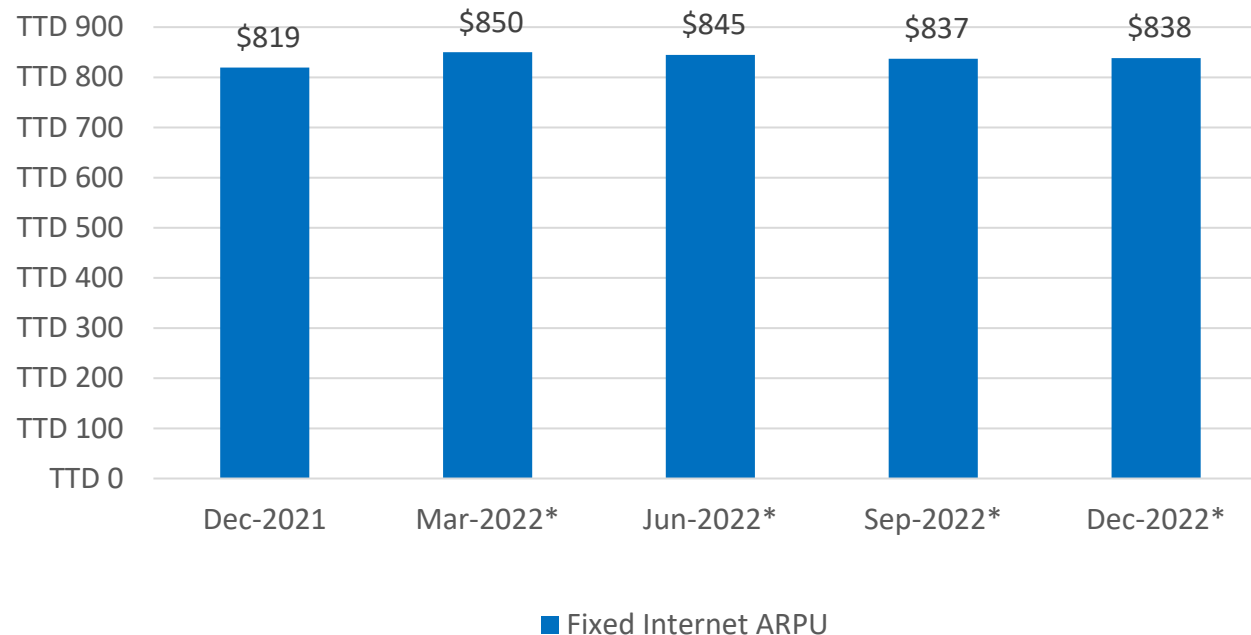


Y-o-Y
PERCENT
CHANGE
2.3%



Q-o-Q
PERCENT
CHANGE
0.1%

ARPU for Fixed Internet Services
from Q4 2021 to Q4 2022



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

Subscription TV



Subscription TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

226,800



Y-o-Y PERCENT CHANGE

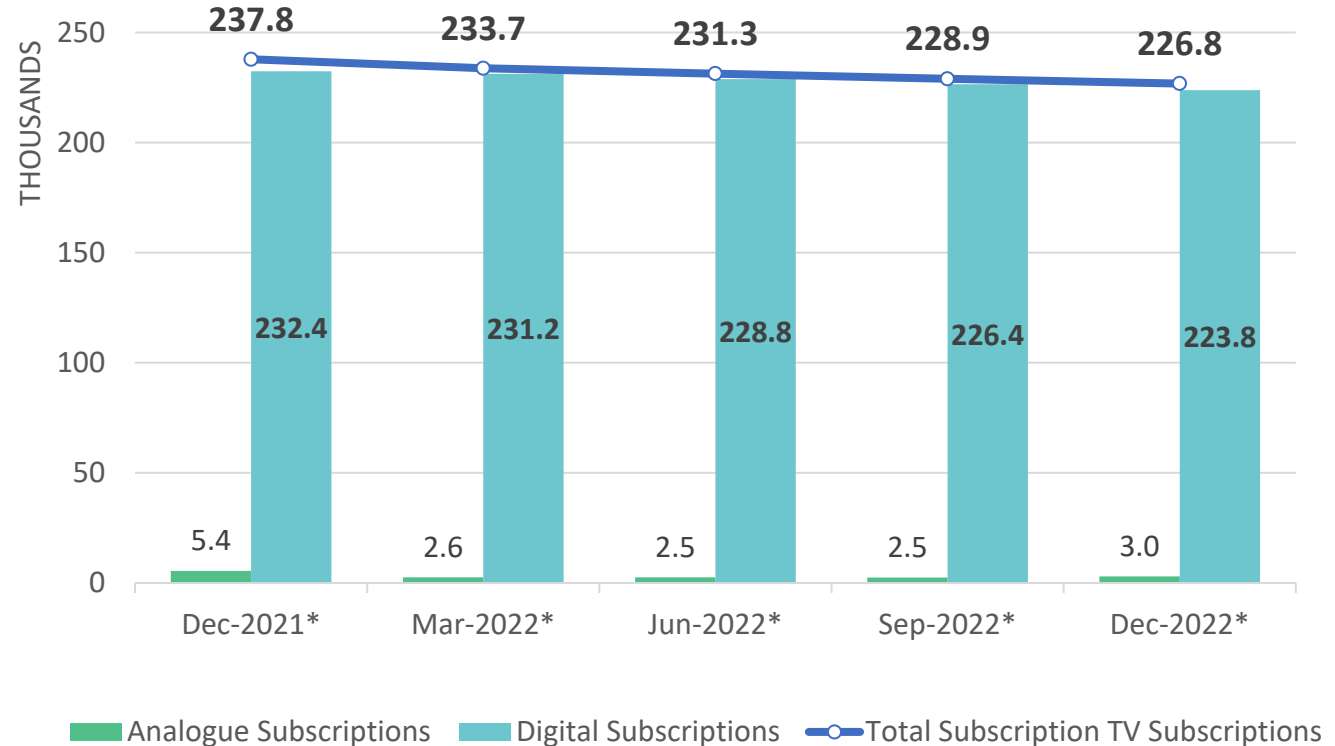
-4.6%



Q-o-Q PERCENT CHANGE

-0.9%

Number of Subscription TV Subscriptions from Q4 2021 to Q4 2022



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

Subscription TV Penetration



**SUBSCRIPTION TV
PENETRATION PER
100 INHABITANTS**

16.4



**Y-o-Y
PERCENT
CHANGE**

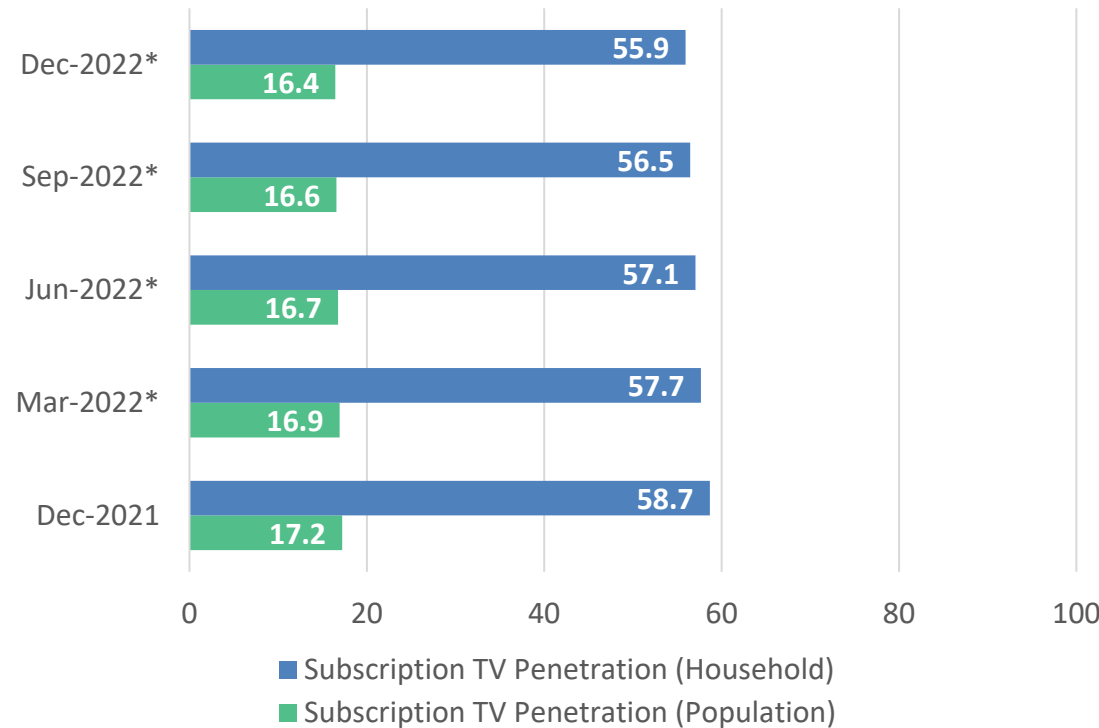
-4.6%



**Q-o-Q
PERCENT
CHANGE**

-1.2%

Penetration Rates of Subscription TV Services
from Q4 2021 to Q4 2022



**SUBSCRIPTION TV
PENETRATION PER
100 HOUSEHOLDS**

55.9



**Y-O-Y
PERCENT
CHANGE**

-3.1%



**Q-O-Q
PERCENT
CHANGE**

-1.1%

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

Subscription TV Revenues



**GROSS
REVENUES**

\$155m



**Y-o-Y
PERCENT
CHANGE**

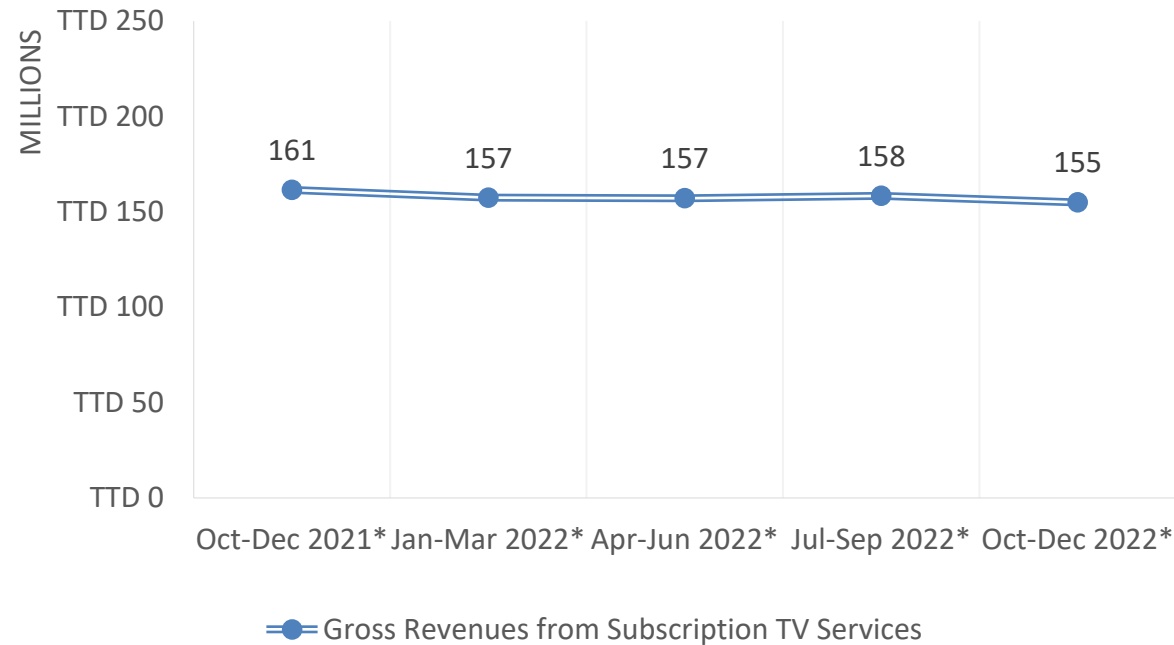
-3.7%



**Q-o-Q
PERCENT
CHANGE**

-1.9%

**GROSS REVENUES FROM SUBSCRIPTION TV SERVICES
FROM Q4 2021 TO Q4 2022**



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

Subscription TV HHI



HHI
3,343



Y-o-Y
PERCENT
CHANGE

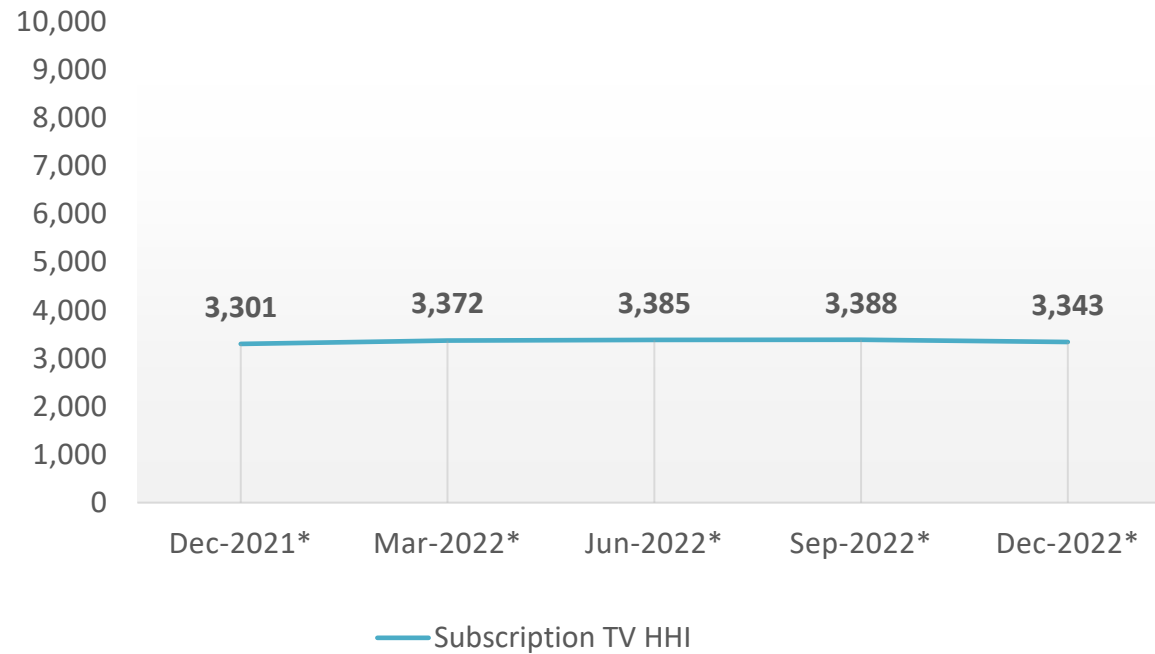
1.3%



Q-o-Q
PERCENT
CHANGE

1.3%

HHI for Subscription TV Services
from Q4 2021 to Q4 2022



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

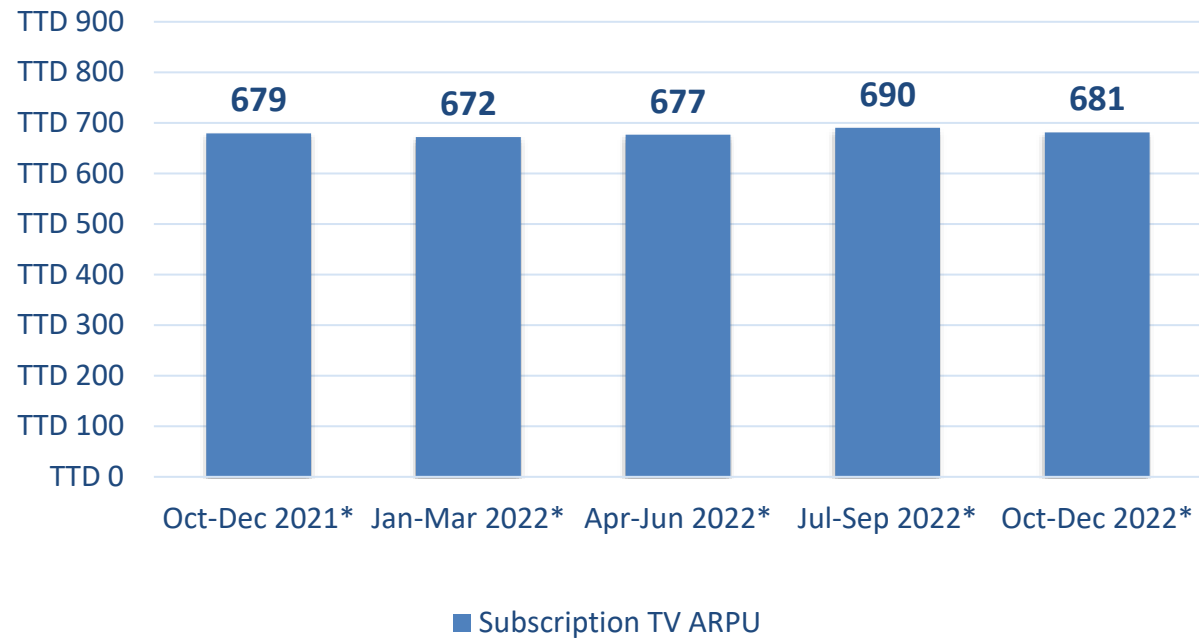
Subscription TV Average Revenue Per User

ARPU
\$ **\$681**

Y-o-Y
PERCENT
CHANGE
0.3%

Q-o-Q
PERCENT
CHANGE
-1.3%

ARPU for Subscription TV Services
from Q4 2021 to Q4 2022

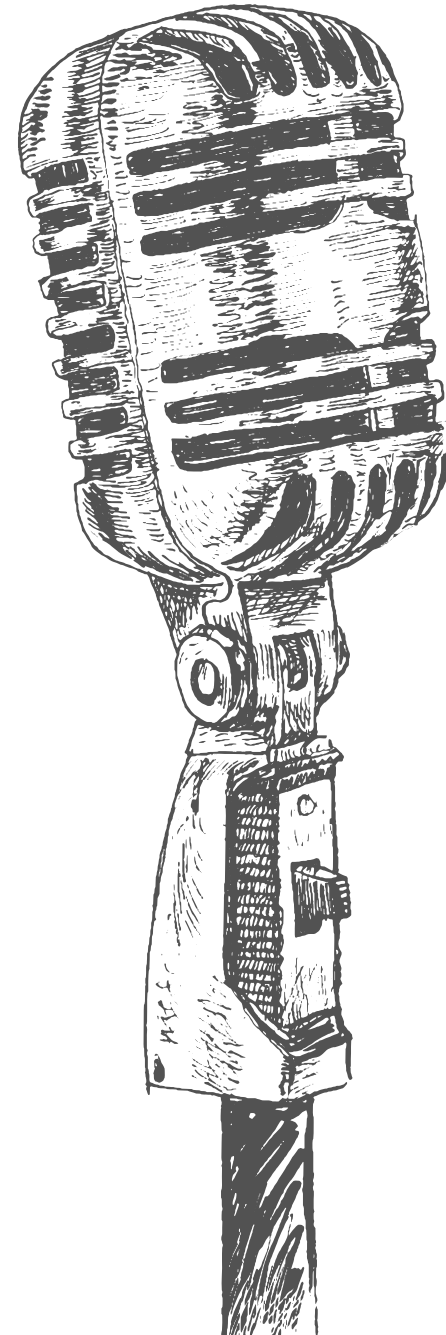


** Data estimated for the following concessionaire who had not submitted data at the date of publication: Greendot Limited*

Free-to-Air Radio

4/11/2023

TATT: 2/10/1/3



Free-to-Air Radio Revenues

\$

GROSS REVENUES

\$34.4m

%

Y-o-Y PERCENT CHANGE

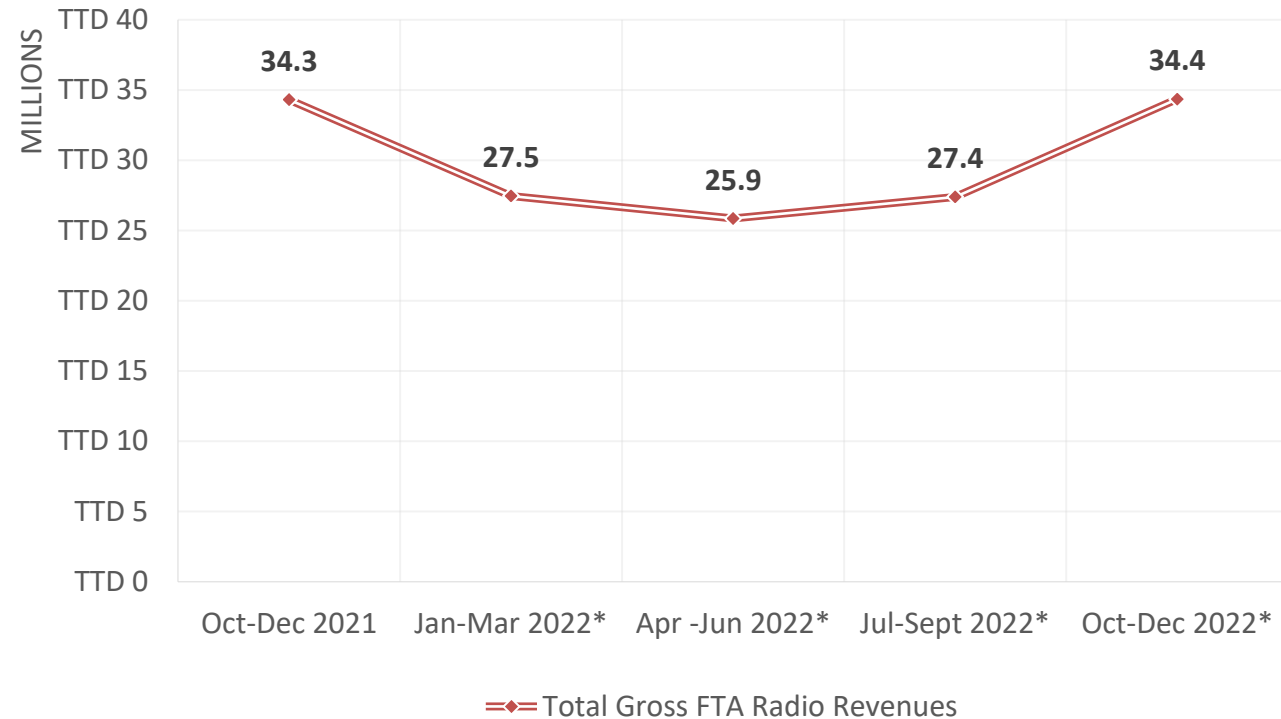
0.3%

%

Q-o-Q PERCENT CHANGE

25.6%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q4 2021 TO Q4 2022



- **Data estimated for the following concessionaires who had not submitted data at the date of publication:**
Q1-Q4: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network
Q4: Gem Radio Five Limited Gem Radio (Gem Radio and Taj radio) and PBCT.

Free-to-Air Radio HHI



HHI
468

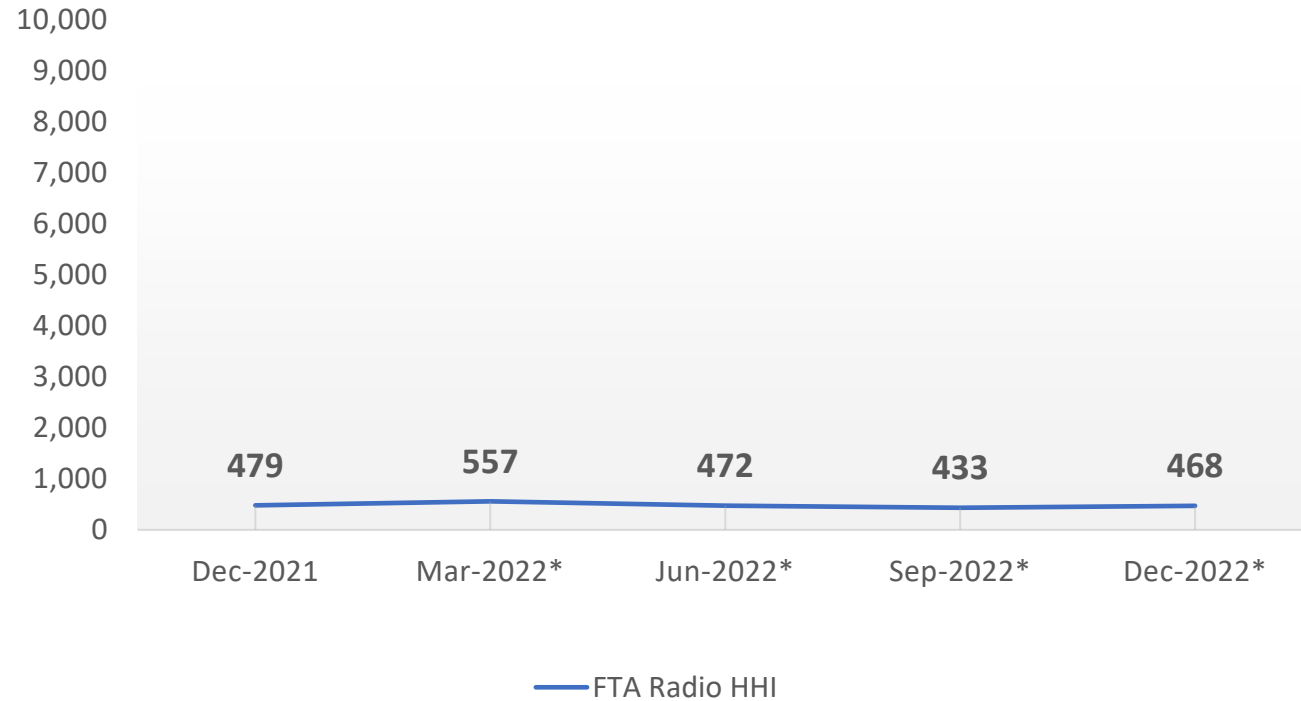


Y-o-Y
PERCENT
CHANGE
-2.3%



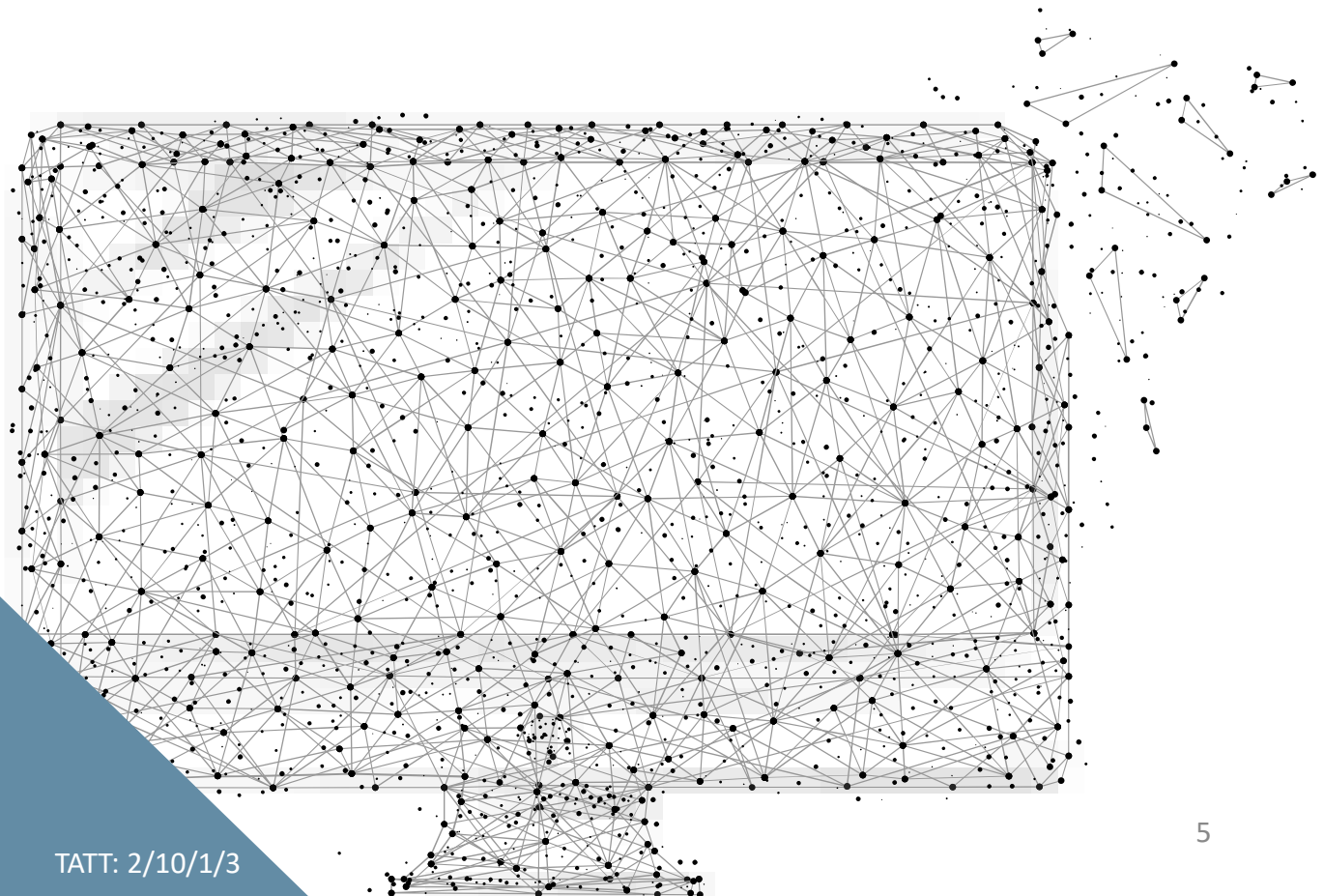
Q-o-Q
PERCENT
CHANGE
8.1%

HHI for Free to Air Radio Services
from Q4 2021 to Q4 2022



* Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1-Q4: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network
Q4: Gem Radio Five Limited Gem Radio (Gem Radio and Taj radio) and PBCT.

Free-to-Air TV



Free-to-Air TV Revenues



GROSS REVENUES

\$28.3m



Y-o-Y PERCENT CHANGE

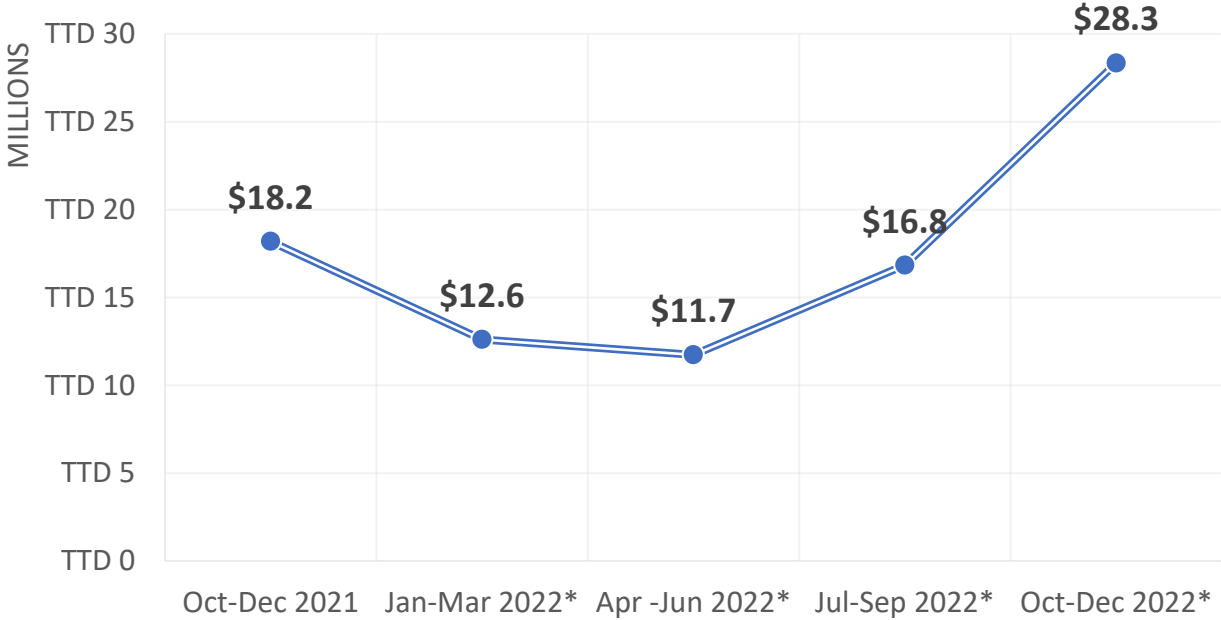
55.5%



Q-o-Q PERCENT CHANGE

68.5%

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q4 2021 TO Q4 2022



●= Gross Revenues - FTA TV

- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*
Q1-Q4: Advanced Community Network
Q4: C.C.N. Television Limited

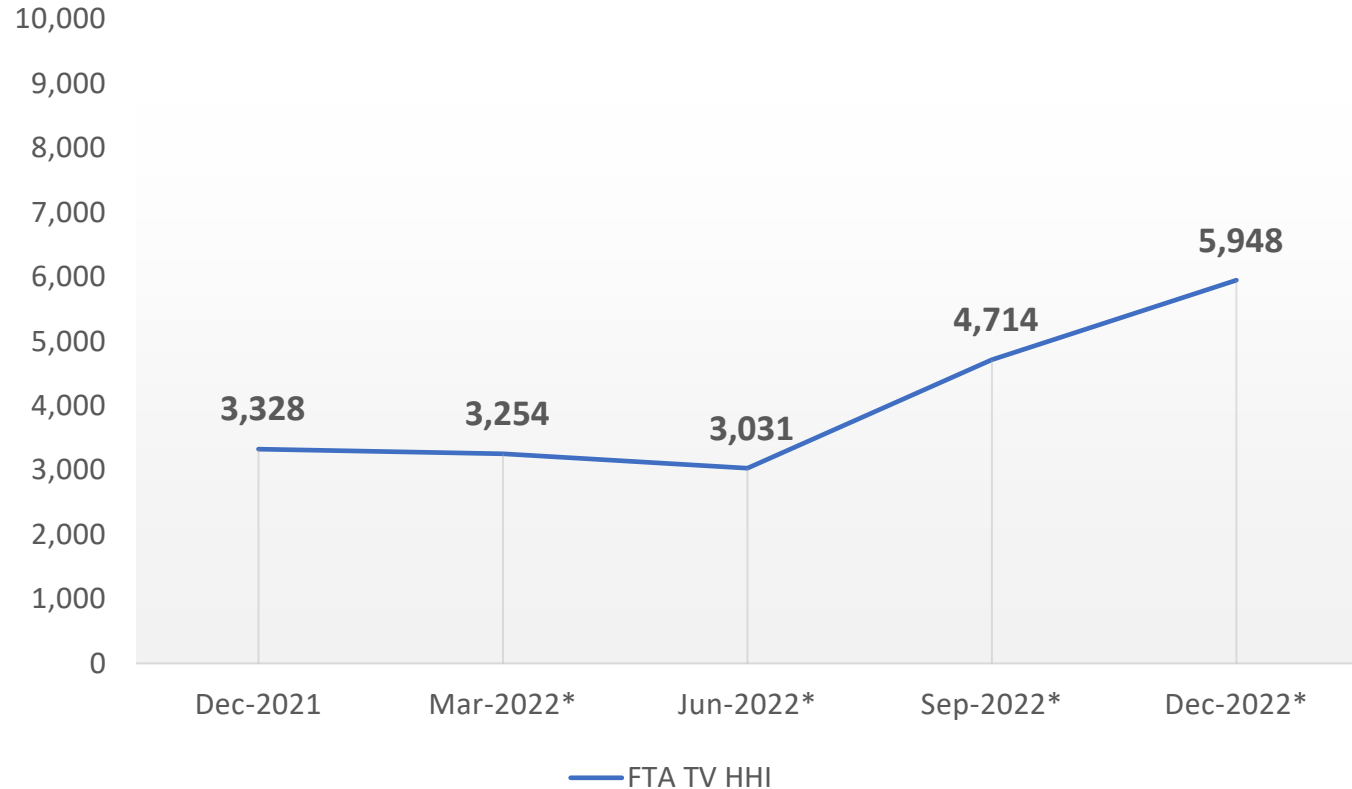
Free-to-Air TV HHI

HHI
5,948

Y-o-Y
PERCENT
CHANGE
78.7%

Q-o-Q
PERCENT
CHANGE
26.2%

HHI for Free to Air TV Services
Q4 2021 to Q4 2022



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*
Q1-Q4: Advanced Community Network
Q4: C.C.N. Television Limited

QUARTERLY MARKET UPDATE

October to December 2022

