

# QUARTERLY MARKET UPDATE

January to March 2023



## Quarterly Market Update – Q1 2023

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)

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TATT: 2/10/1/3

# Contents

## Telecommunications Sector

01

**Fixed Voice Market**

---

02

**Mobile Market**

---

03

**Internet Market**

---

## Broadcasting Sector

04

**Subscription TV Market**

---

05

**Free-to-Air Radio Market**

---

06

**Free-to-Air TV Market**

---

07

**Broadcasting service via cable  
Market**

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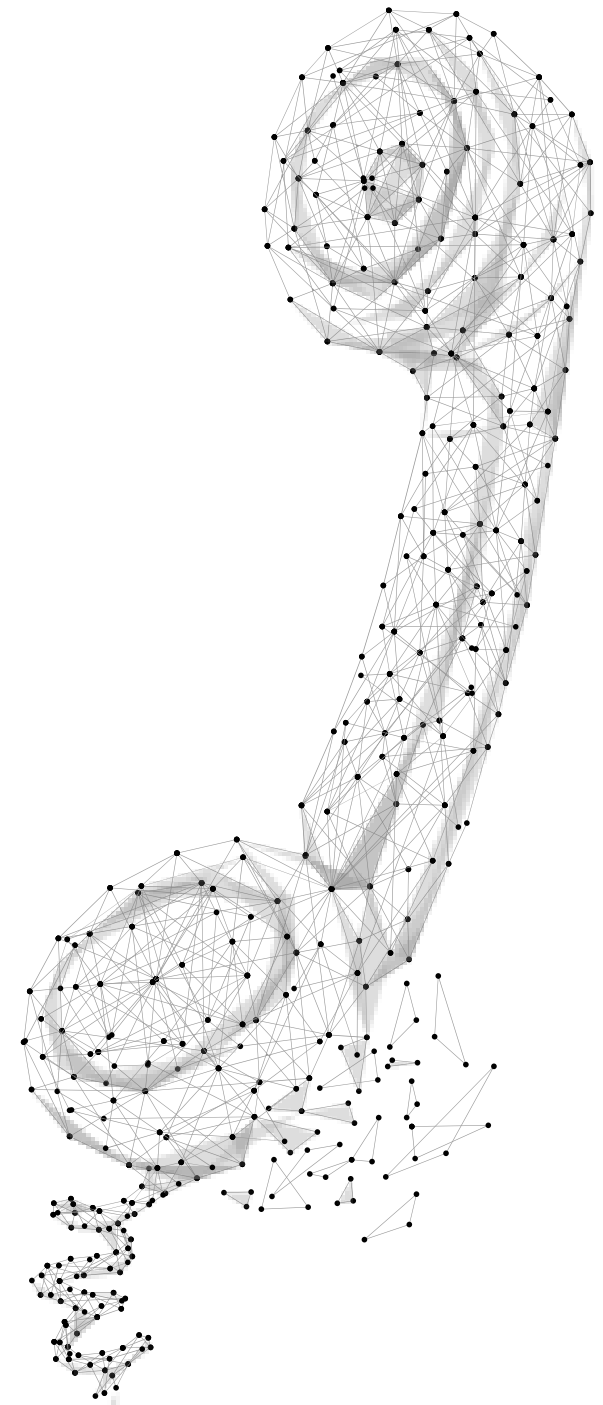
# Notes

- 1. The number of Fixed Internet subscriptions has been revised for 2022 based on revisions submitted by concessionaires.**
- 2. The Free to Air TV market has been separated into the Free to Air TV market and Broadcasting Services via Cable market.**
- 3. 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

6/30/2023

TATT: 2/10/1/3



# Fixed Voice Subscriptions



**TOTAL NUMBER OF SUBSCRIPTIONS**

**322,000**



**Y-o-Y PERCENT CHANGE**

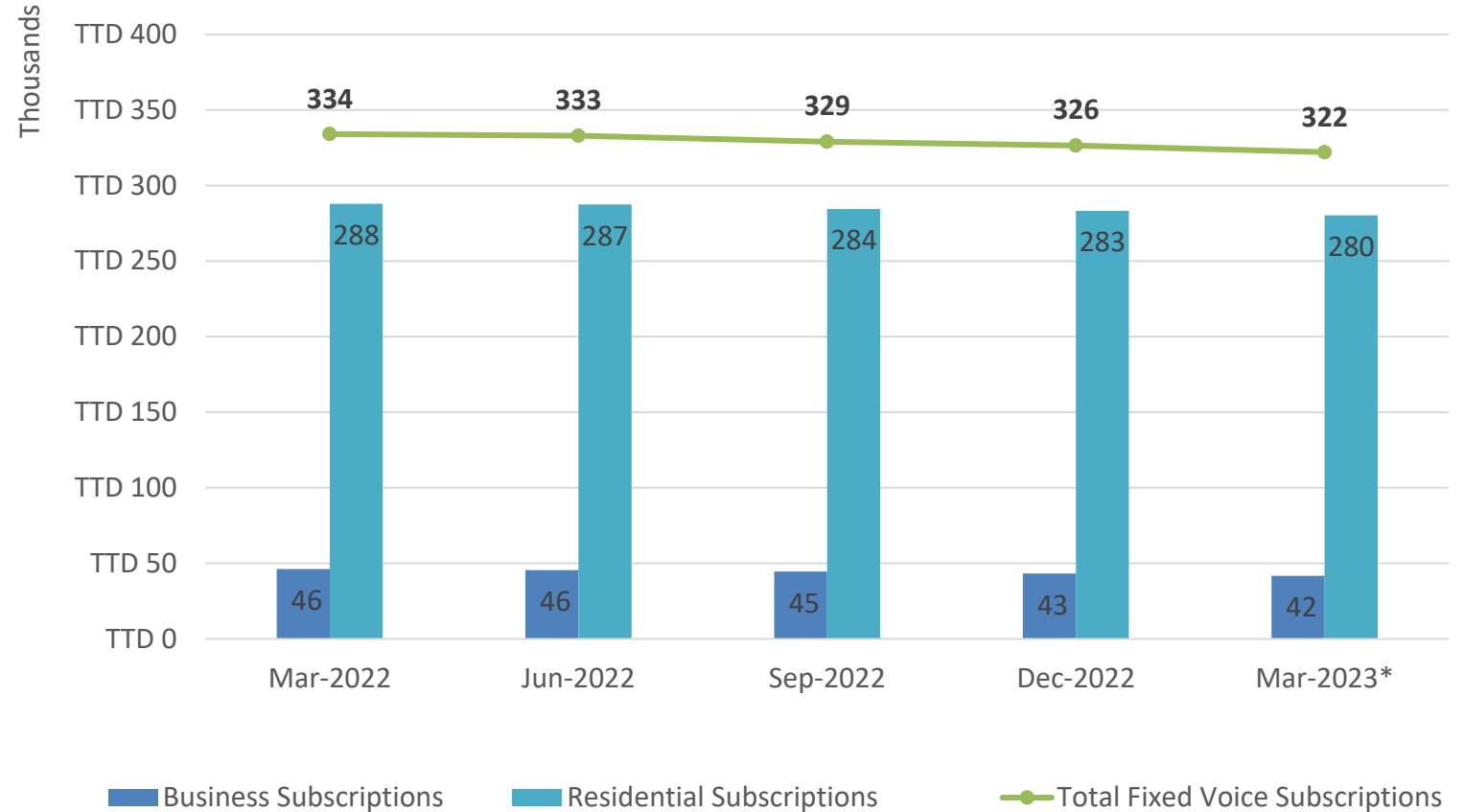
**-3.4%**



**Q-o-Q PERCENT CHANGE**

**-1.2%**

Number of Fixed Line Subscriptions  
Q1 2022 to Q1 2023



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

# Fixed Voice Penetration



**FIXED VOICE  
PENETRATION PER  
100 INHABITANTS**

**23.6**



**Y-o-Y  
PERCENT  
CHANGE**

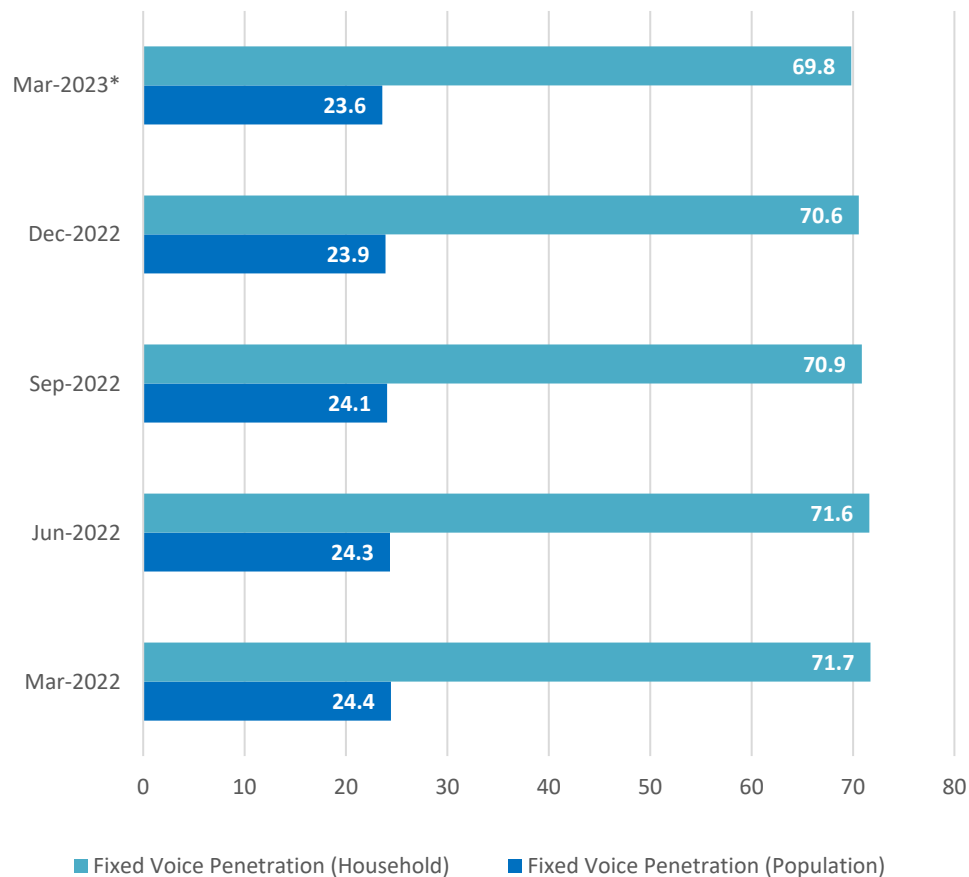
**-3.3%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.3%**

**Penetration Rate of Fixed Line Subscriptions  
from Q1 2022 to Q1 2023**



■ Fixed Voice Penetration (Household) ■ Fixed Voice Penetration (Population)

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



**FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS**

**69.8**



**Y-o-Y  
PERCENT  
CHANGE**

**-2.6%**



**Q-o-Q  
PERCENT  
CHANGE**

**-1.1%**

# Fixed Voice Revenues



GROSS REVENUES

**\$85.2m**



Y-o-Y PERCENT CHANGE

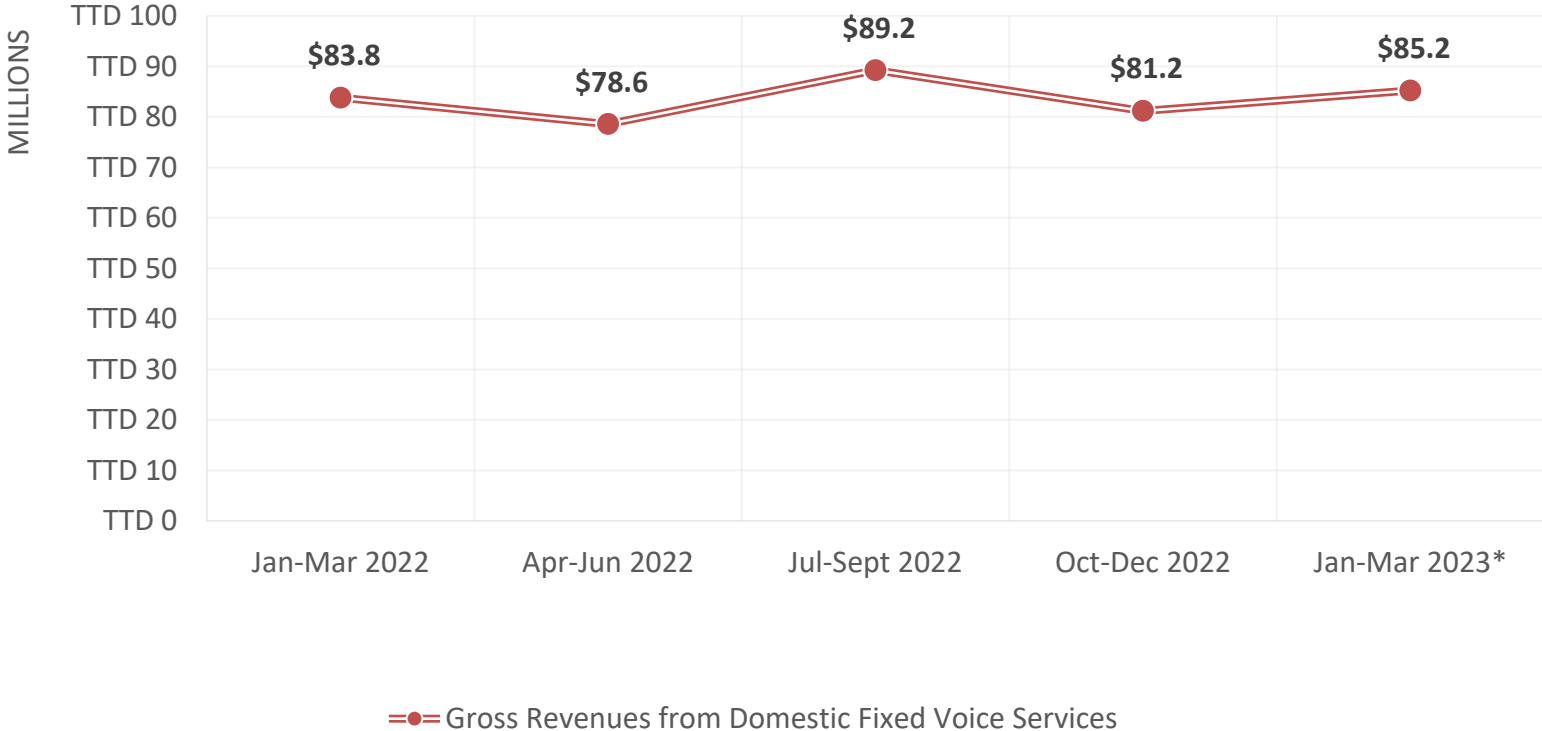
**1.7%**



Q-o-Q PERCENT CHANGE

**4.9%**

Gross revenues from domestic fixed voice services from Q1 2022 to Q1 2023



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



# Fixed Voice HHI



HHI

3,369



Y-o-Y  
PERCENT  
CHANGE

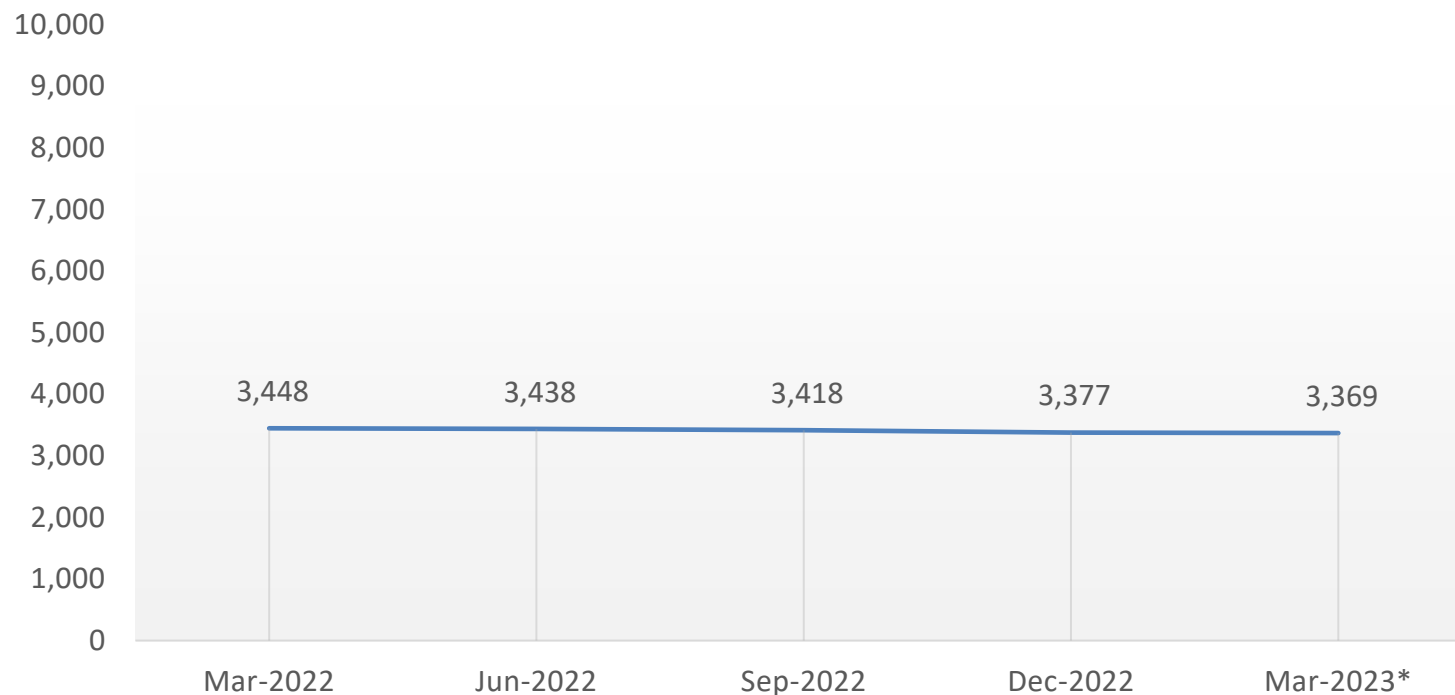
-2.4%



Q-o-Q  
PERCENT  
CHANGE

-0.2%

HHI for Domestic Fixed Line  
from Q1 2022 to Q1 2023



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

# Fixed Voice Average Revenue Per User



ARPU  
**\$263**

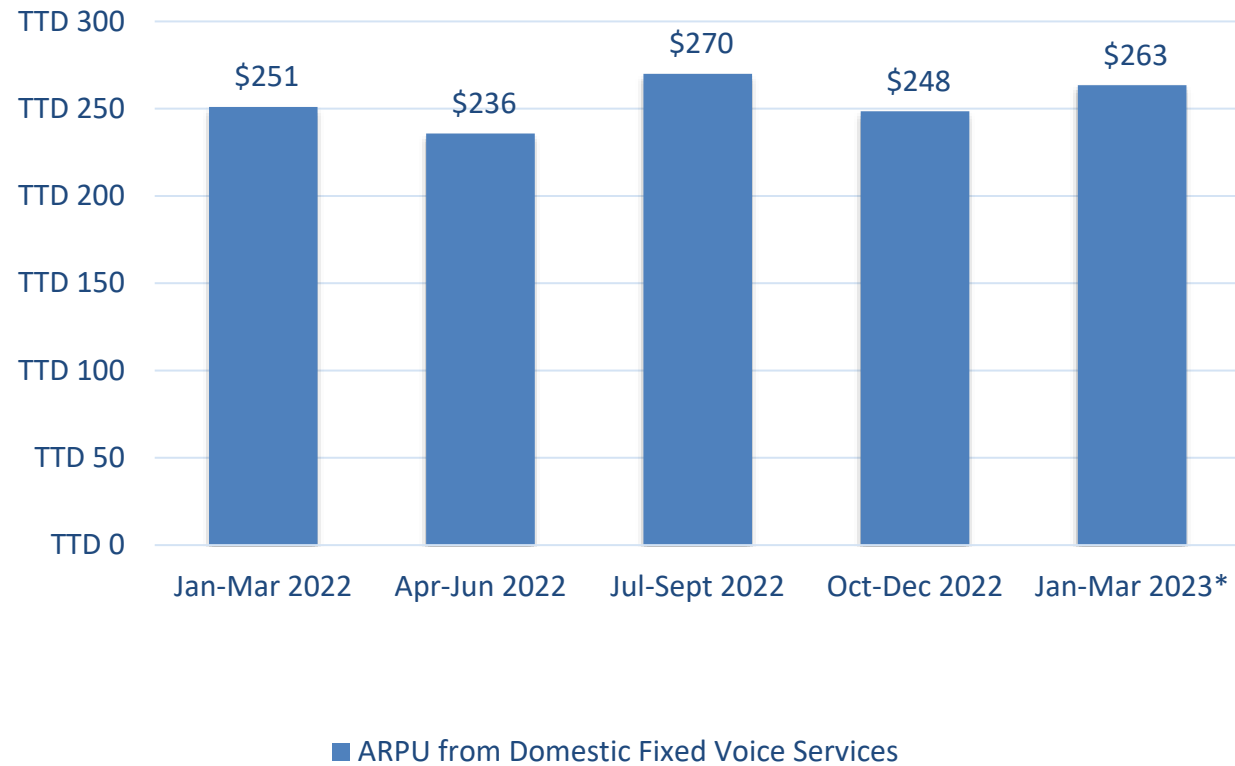


Y-o-Y  
PERCENT  
CHANGE  
**4.8%**



Q-o-Q  
PERCENT  
CHANGE  
**10.1%**

ARPU from Domestic Fixed Voice Services  
from Q1 2022 to Q1 2023

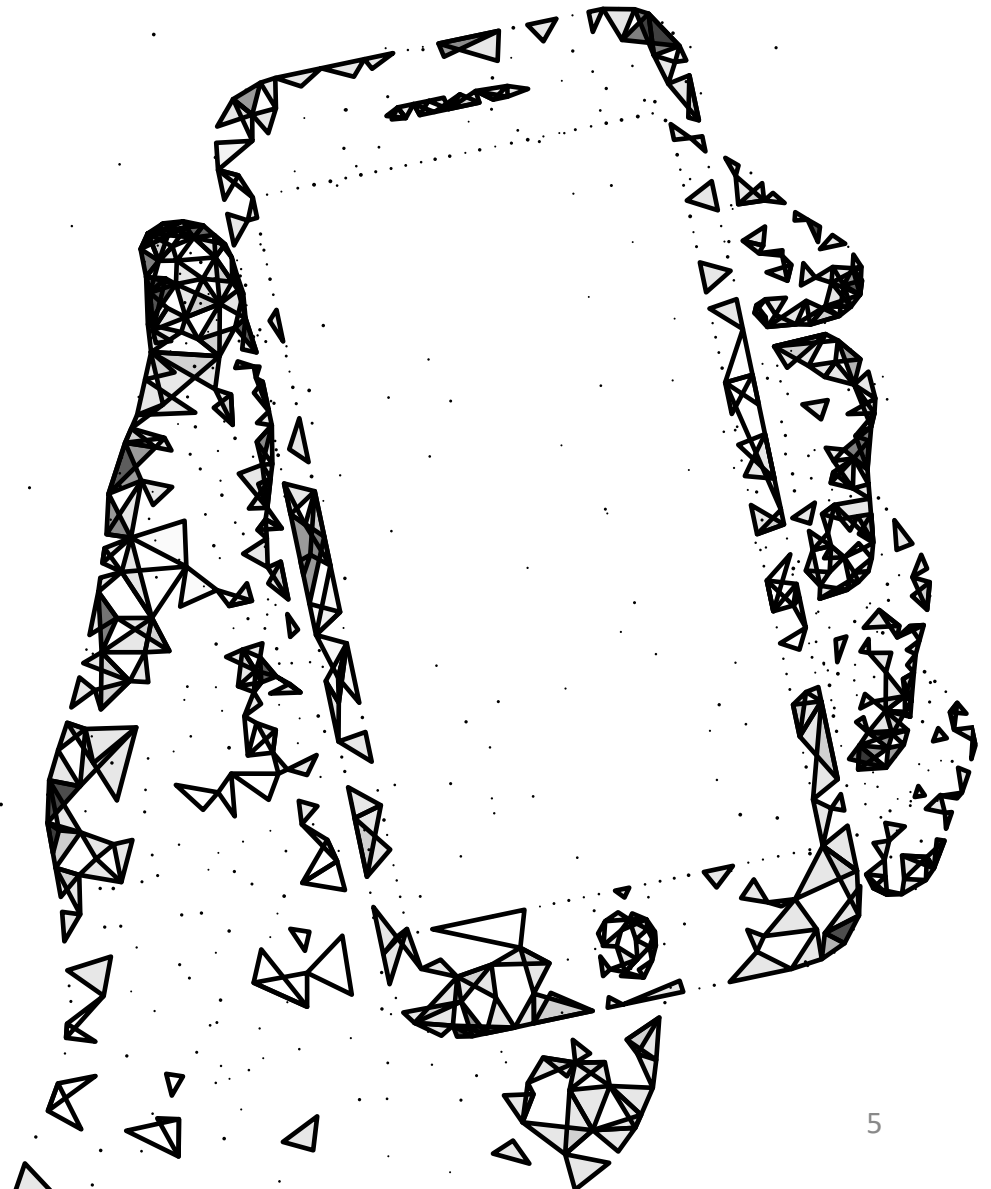


\* Data estimated for the following concessionaire who had not submitted data at the date of publication: *Amplia Communications Limited*

# Mobile Voice

6/30/2023

TATT: 2/10/1/3



# Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,012,000



Y-o-Y PERCENT CHANGE

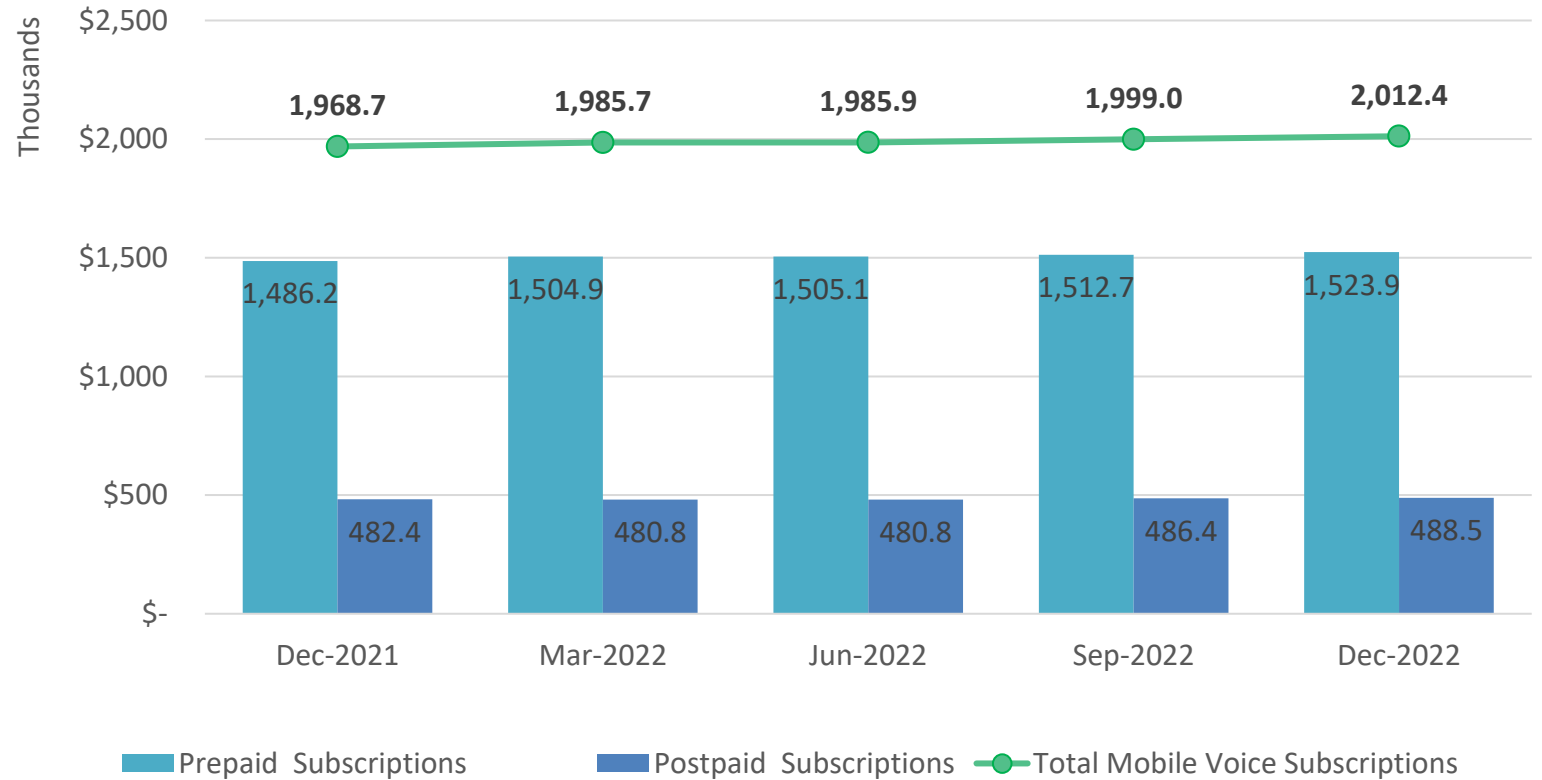
2.2%



Q-o-Q PERCENT CHANGE

0.7%

Number of Mobile Voice Subscriptions from Q1 2022 to Q1 2023



# Mobile Voice Penetration



**MOBILE VOICE  
PENETRATION  
PER 100  
INHABITANTS**

**147**



**Y-o-Y  
PERCENT  
CHANGE**

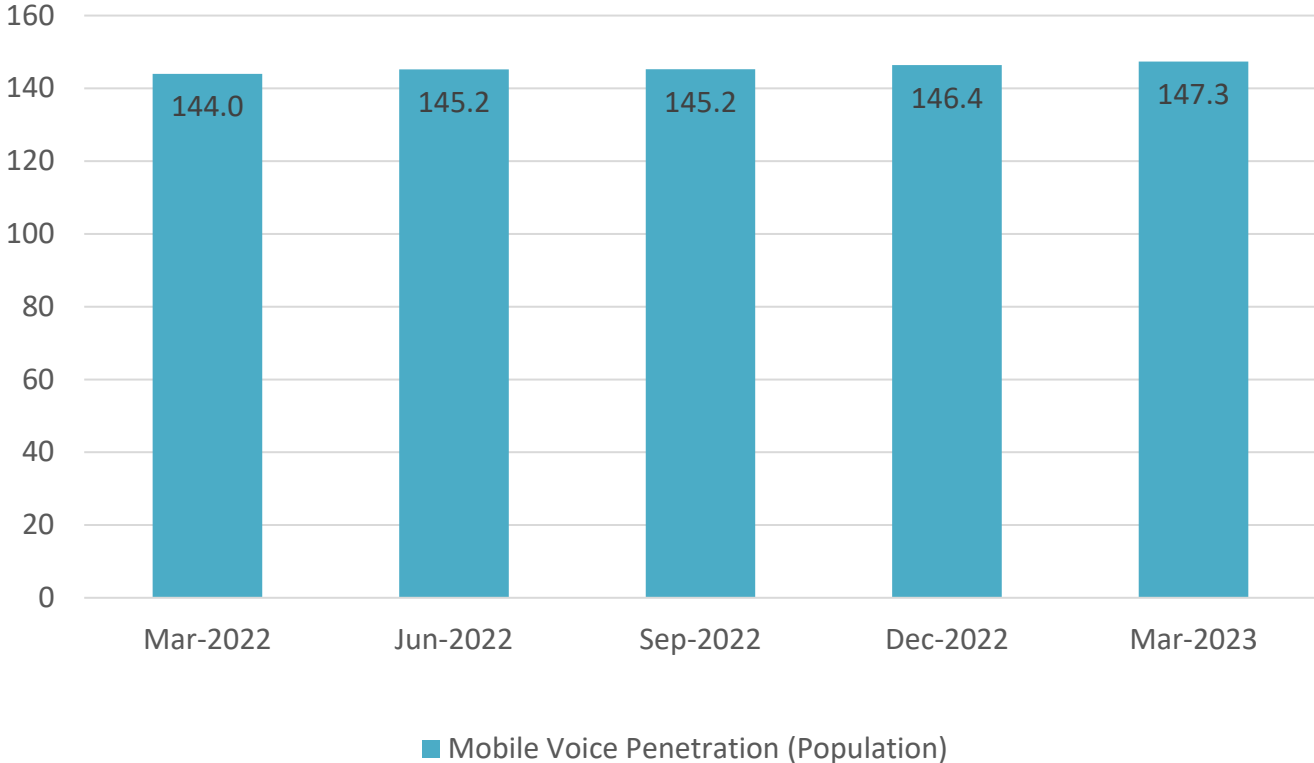
**2.3%**



**Q-o-Q  
PERCENT  
CHANGE**

**0.6%**

Penetration of Mobile Voice Subscriptions  
from Q1 2022 to Q1 2023



# Mobile Services Revenues



**GROSS REVENUES**

**\$ 523.9m**



**Y-o-Y PERCENT CHANGE**

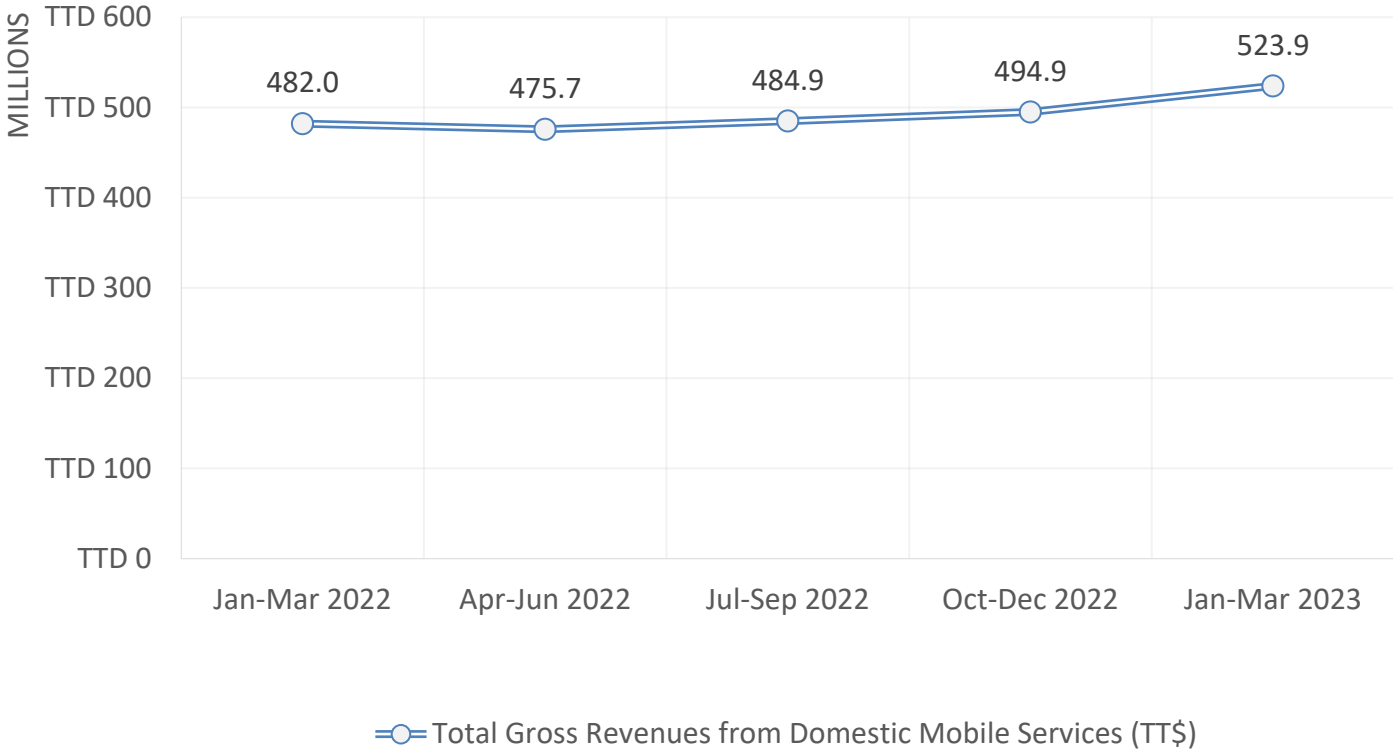
**8.7%**



**Q-o-Q PERCENT CHANGE**

**5.9%**

Total gross revenues from domestic mobile services (TT\$)  
From Q1 2022 to Q1 2023



*Includes revenues from Mobile voice and Internet services.*

# Mobile Voice HHI



HHI

5,203



Y-o-Y  
PERCENT  
CHANGE

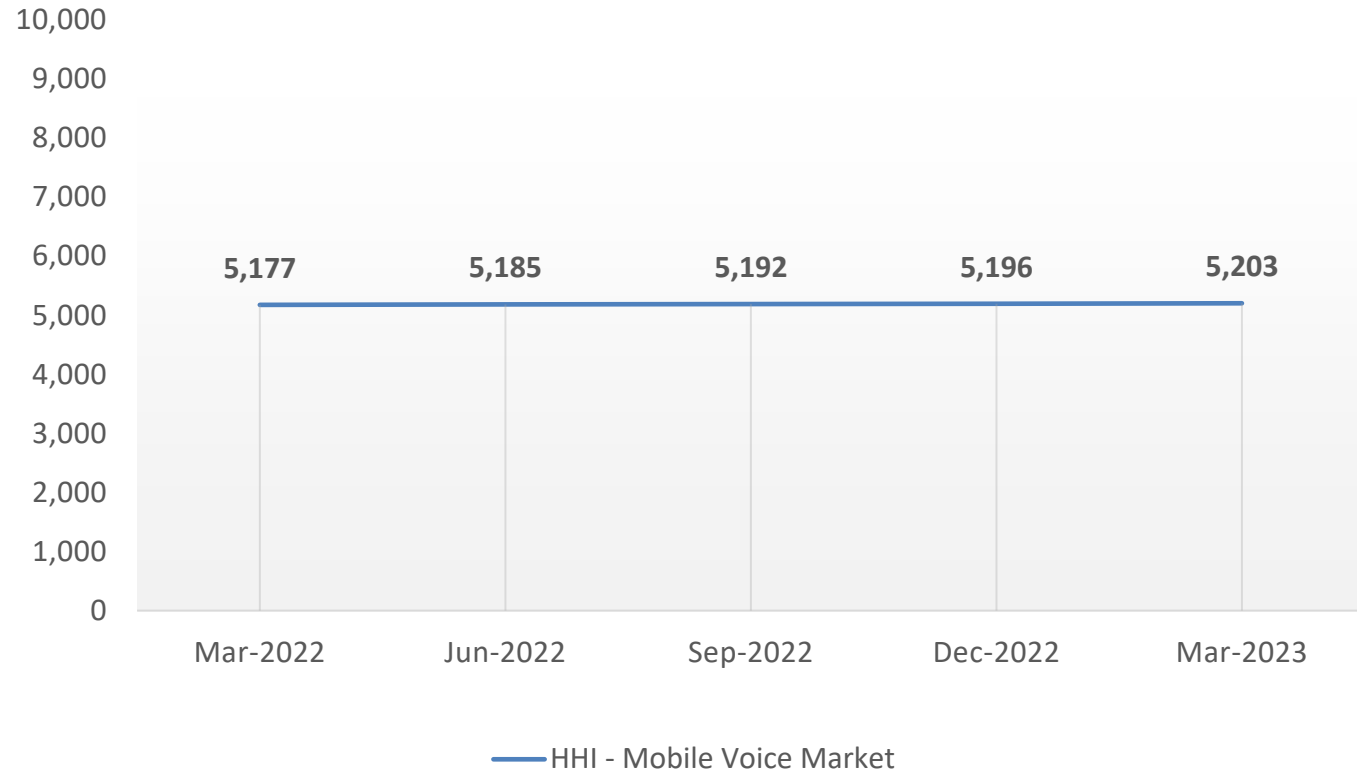
0.5%



Q-o-Q  
PERCENT  
CHANGE

0.1%

HHI for Domestic Mobile Services  
from Q1 2022 to Q1 2023



# Average Revenue Per User

## Mobile Services



ARPU  
**\$261**



Y-o-Y  
PERCENT  
CHANGE

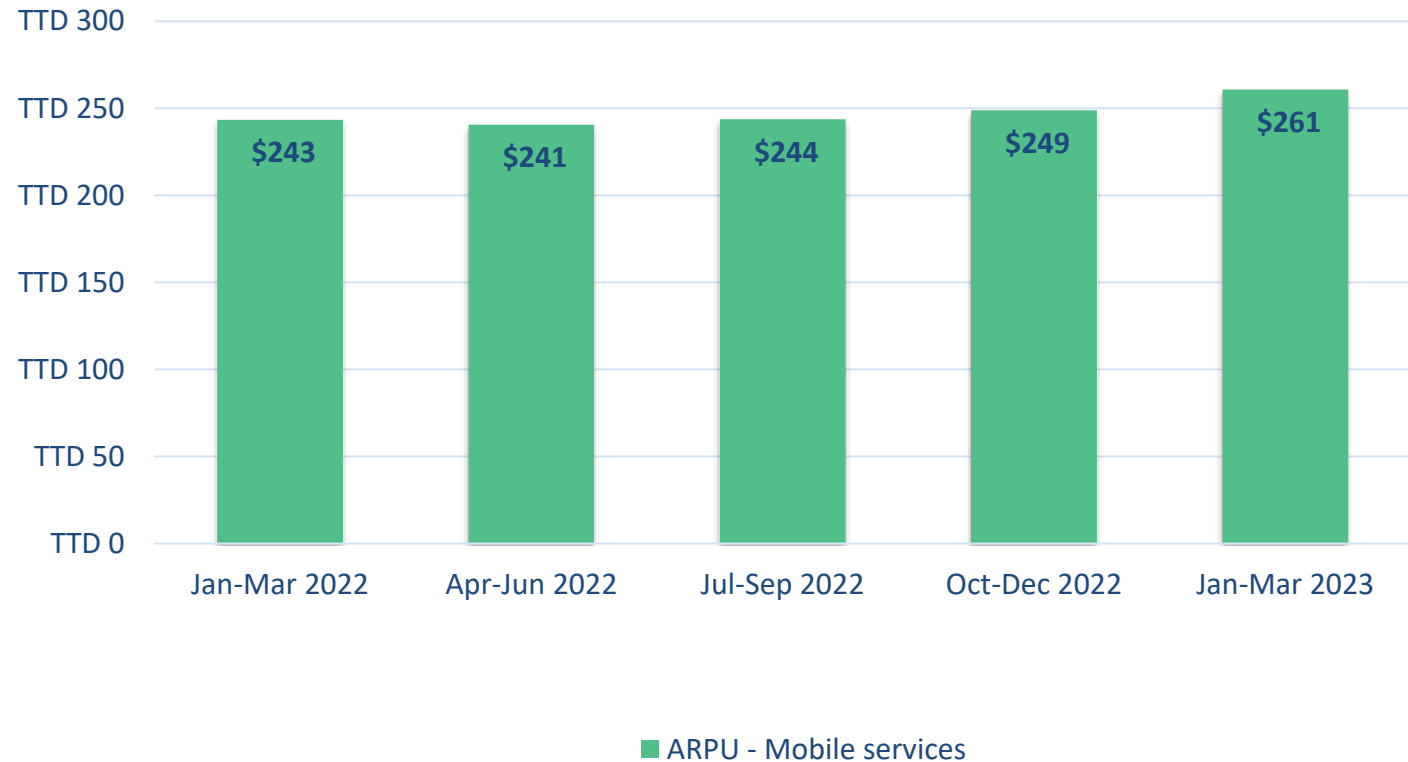
**7.4%**



Q-o-Q  
PERCENT  
CHANGE

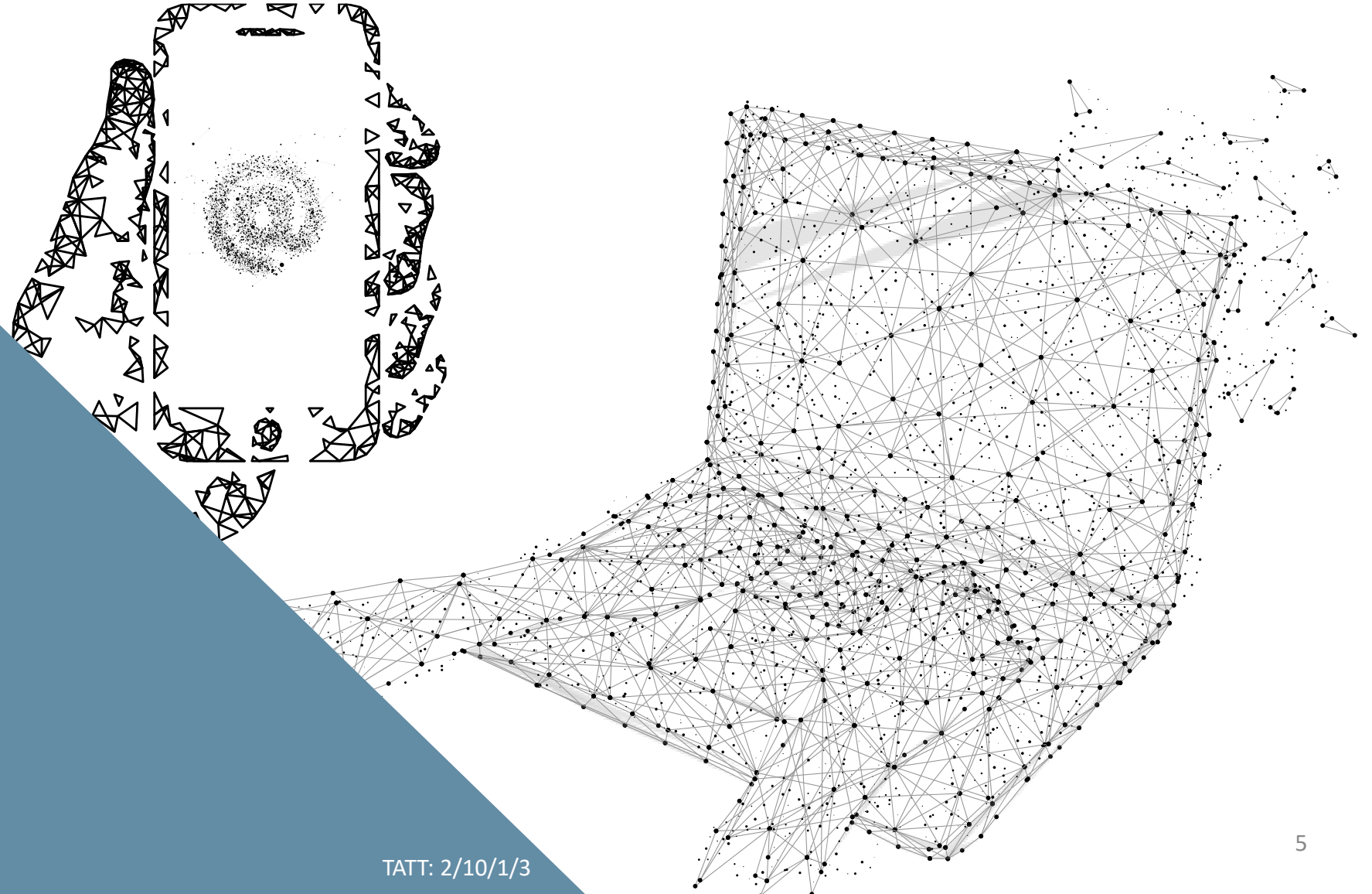
**4.8%**

ARPU for Domestic Mobile Services  
from Q1 2022 to Q1 2023





# Internet



# Fixed Broadband Subscriptions



TOTAL NUMBER OF  
SUBSCRIPTIONS

394,700



Y-o-Y  
PERCENT  
CHANGE

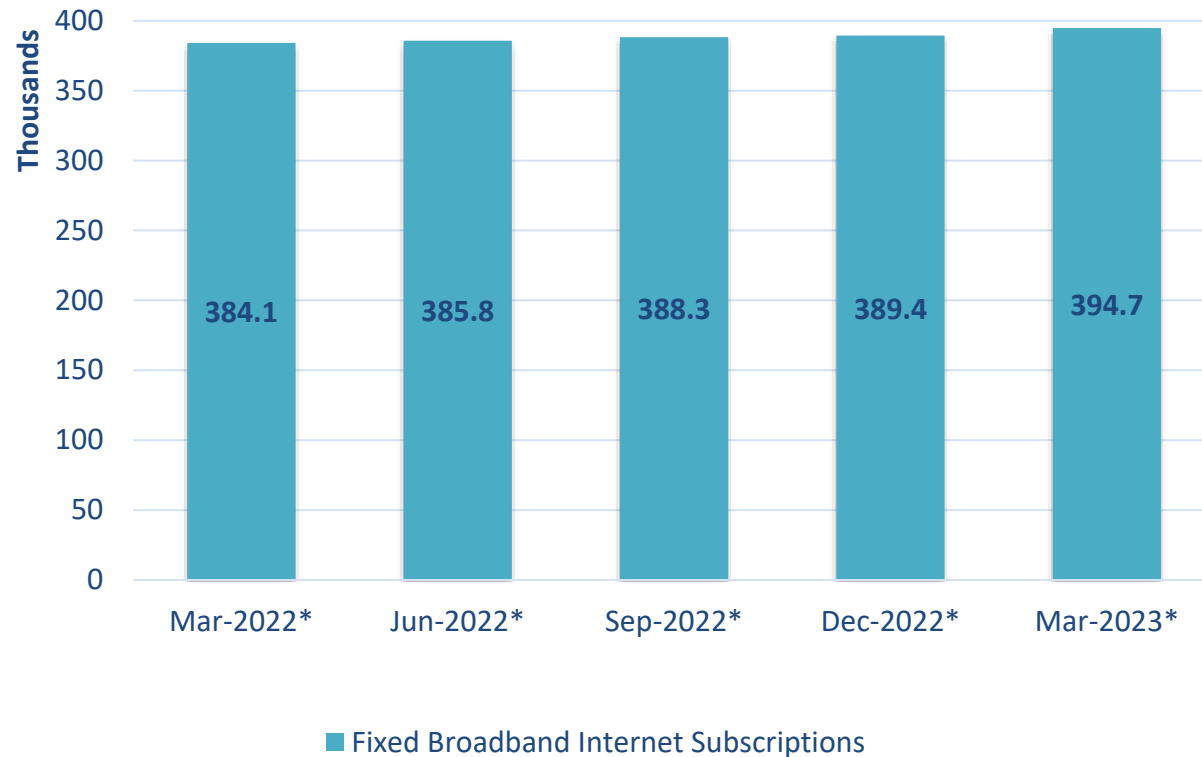
2.8%



Q-o-Q  
PERCENT  
CHANGE

1.4%

Number of Fixed Broadband Internet Subscriptions  
from Q1 2022 to Q1 2023



\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited

TATT: 2/10/1/3

# Fixed Internet Penetration



**FIXED INTERNET  
PENETRATION  
PER 100  
INHABITANTS**

**29**



**Y-o-Y  
PERCENT  
CHANGE**

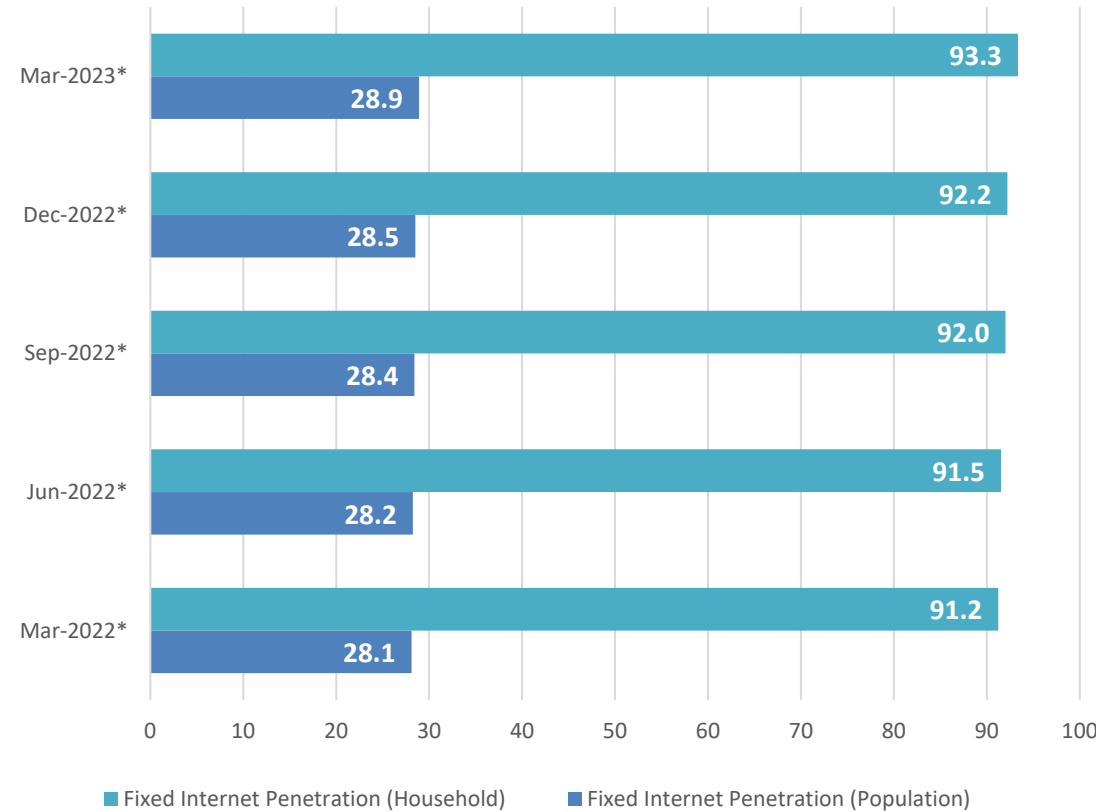
**2.8%**



**Q-o-Q  
PERCENT  
CHANGE**

**1.4%**

Penetration for Fixed Internet Subscriptions  
from Q1 2022 to Q1 2023



**FIXED INTERNET  
PENETRATION  
PER 100  
HOUSEHOLDS**

**93**



**Y-O-Y  
PERCENT  
CHANGE**

**2.3%**



**Q-O-Q  
PERCENT  
CHANGE**

**1.2%**

*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited*

TATT: 2/10/1/3

# Mobile Internet Penetration



**MOBILE INTERNET  
PENETRATION PER  
100 INHABITANTS**

**57**



**Y-o-Y  
PERCENT  
CHANGE**

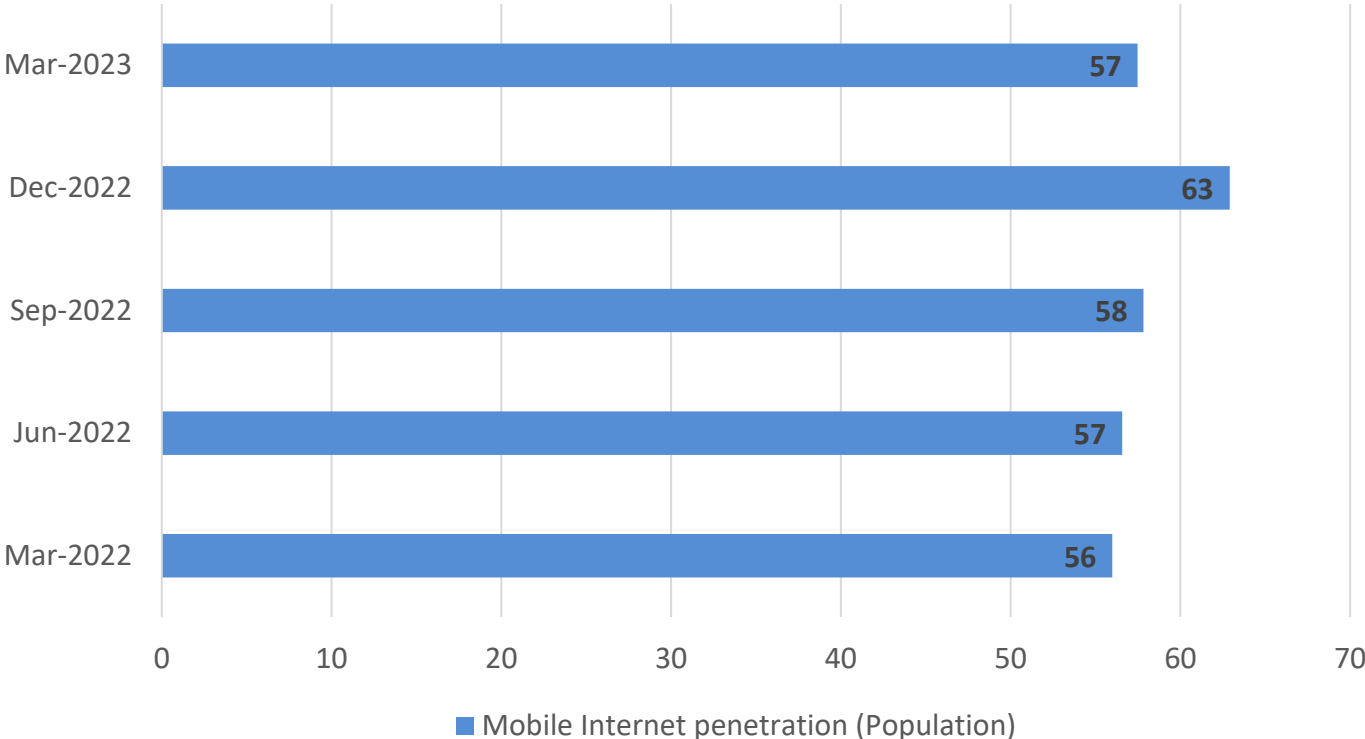
**1.9%**



**Q-o-Q  
PERCENT  
CHANGE**

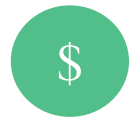
**-8.5%**

Penetration for Mobile Internet Subscriptions  
from Q1 2022 to Q1 2023



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

# Fixed Internet Revenues



GROSS REVENUES  
\$ 308.3m



Y-o-Y  
PERCENT  
CHANGE

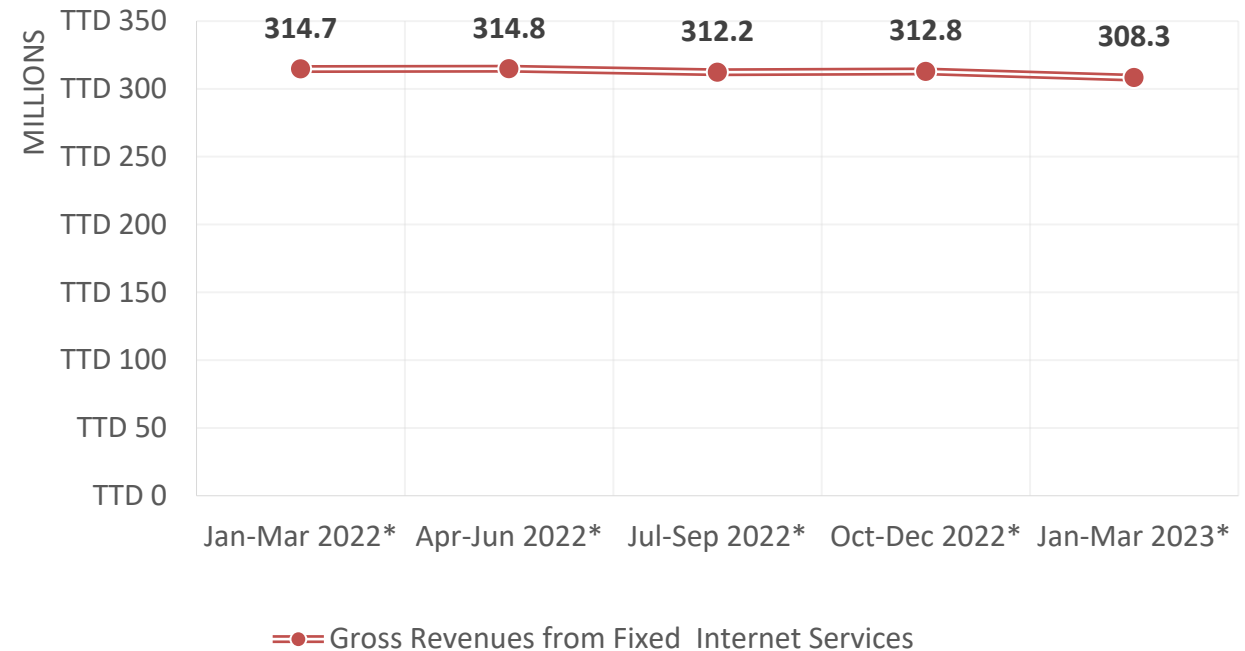
-1.9%



Q-o-Q  
PERCENT  
CHANGE

-1.1%

Gross revenues from fixed Internet services from Q1 2022 to Q1 2023



\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
 Q1-Q4 2022: Greendot Limited  
 Q1 2023: Amplia Communications Limited and Greendot Limited

# Fixed Internet HHI



HHI  
**2,796**



Y-o-Y  
PERCENT  
CHANGE  
**-2.4%**



Q-o-Q  
PERCENT  
CHANGE  
**-0.7%**

HHI for Fixed Internet Services  
from Q1 2022 to Q1 2023



\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited

# Fixed Internet Average Revenue Per User



ARPU  
**\$781**

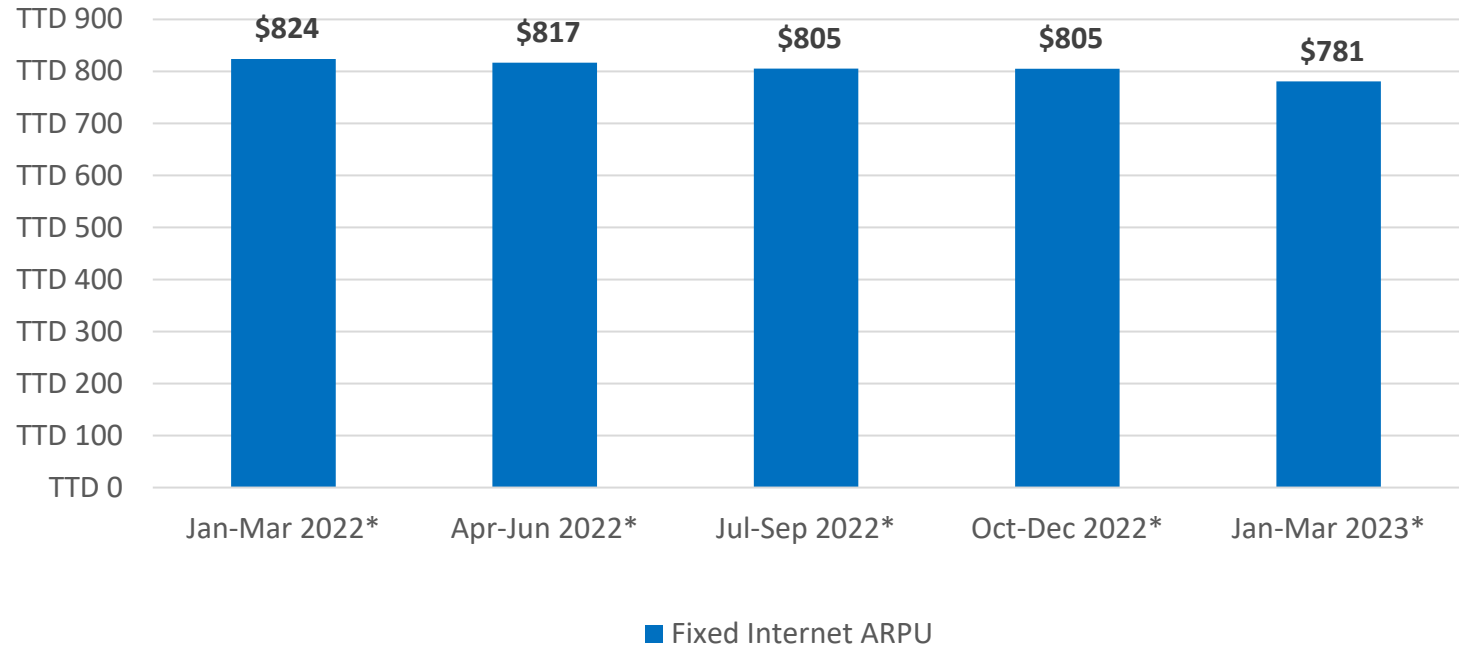


Y-o-Y  
PERCENT  
CHANGE  
**-5.2%**



Q-o-Q  
PERCENT  
CHANGE  
**-3.0%**

ARPU for Fixed Internet Services  
from Q1 2022 to Q1 2023



\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
 Q1-Q4 2022: Greendot Limited  
 Q1 2023: Amplia Communications Limited and Greendot Limited

# Subscription TV





# Subscription TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

220,500



Y-o-Y PERCENT CHANGE

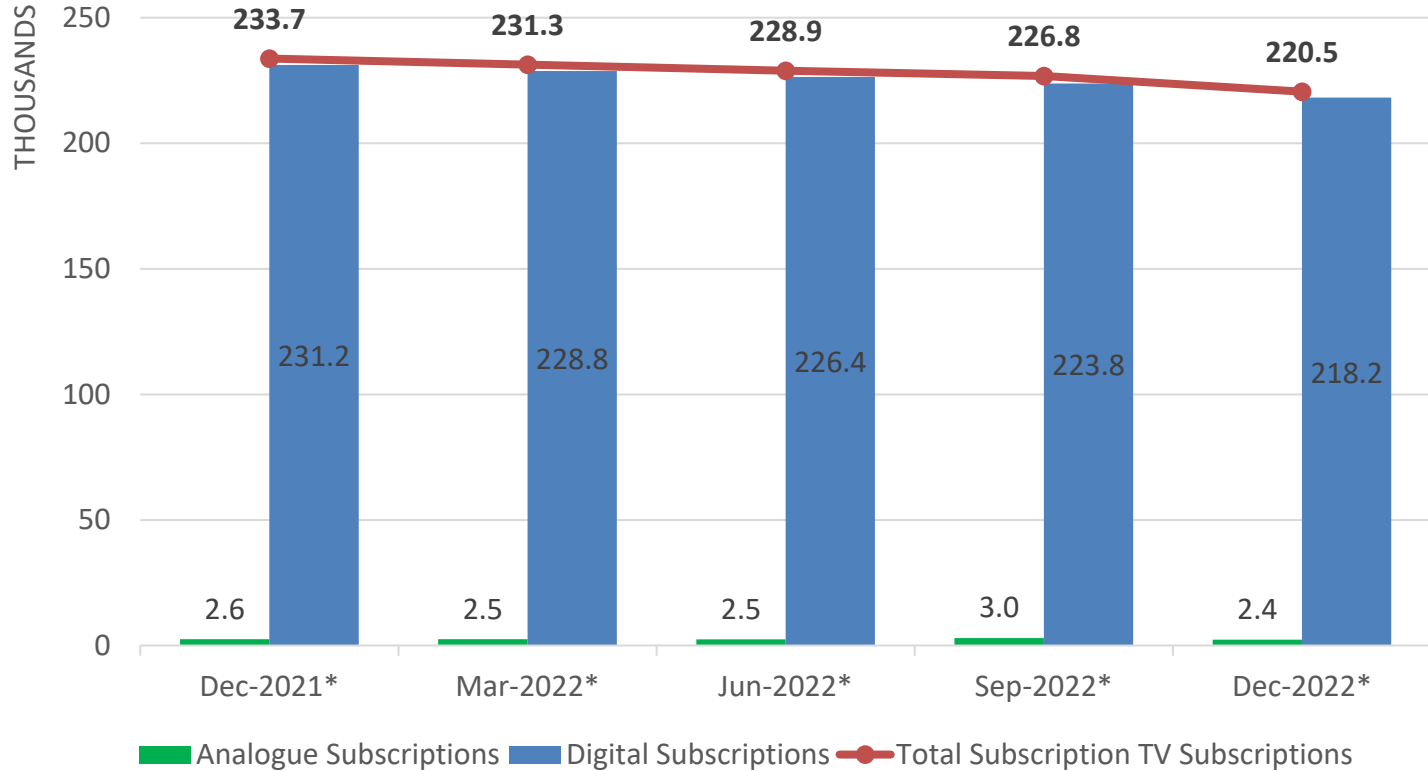
-5.7%



Q-o-Q PERCENT CHANGE

-2.8%

Number of Subscription TV Subscriptions from Q1 2022 to Q1 2023



\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
 Q1-Q4 2022: Greendot Limited  
 Q1 2023: Amplia Communications Limited and Greendot Limited

# Subscription TV Penetration

**SUBSCRIPTION TV  
PENETRATION PER  
100 INHABITANTS**



**16.0**

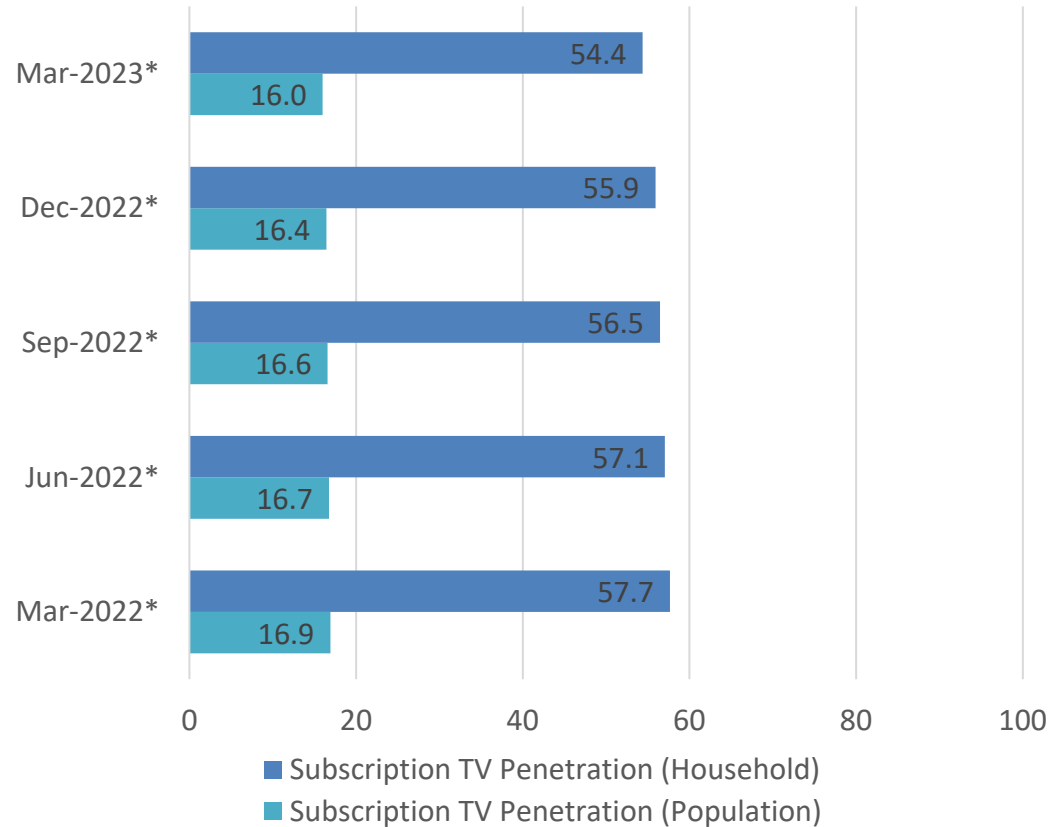
**Y-o-Y  
PERCENT  
CHANGE**

**-5.3%**

**Q-o-Q  
PERCENT  
CHANGE**

**-2.4%**

Penetration Rates of Pay TV Services  
from Q1 2022 to Q1 2023



**SUBSCRIPTION TV  
PENETRATION PER  
100 HOUSEHOLDS**



**54.4**

**Y-O-Y  
PERCENT  
CHANGE**

**-5.7%**

**Q-O-Q  
PERCENT  
CHANGE**

**-2.7%**

*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited*

# Subscription TV Revenues



GROSS REVENUES

**\$153m**



Y-o-Y PERCENT CHANGE

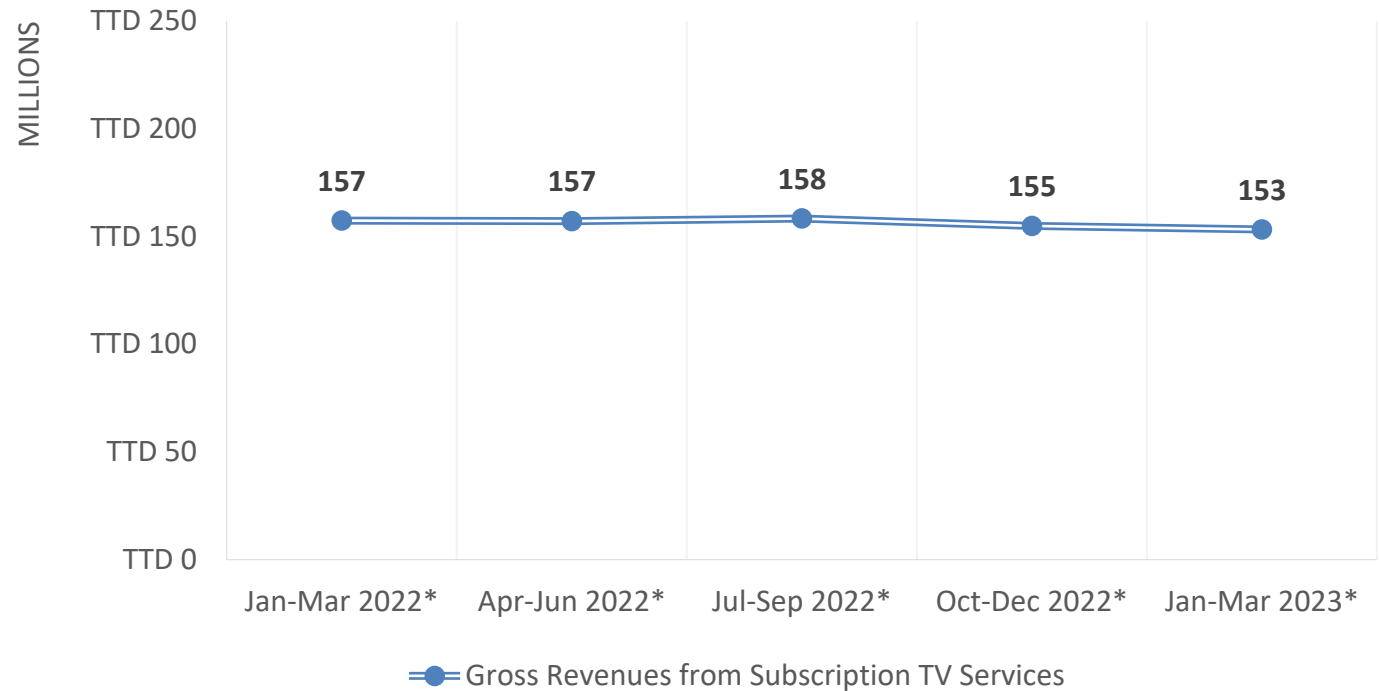
**-2.6%**



Q-o-Q PERCENT CHANGE

**-1.3%**

Gross revenues from subscription TV services  
From Q1 2022 to Q1 2023



\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited

# Subscription TV HHI



HHI  
**3,337**

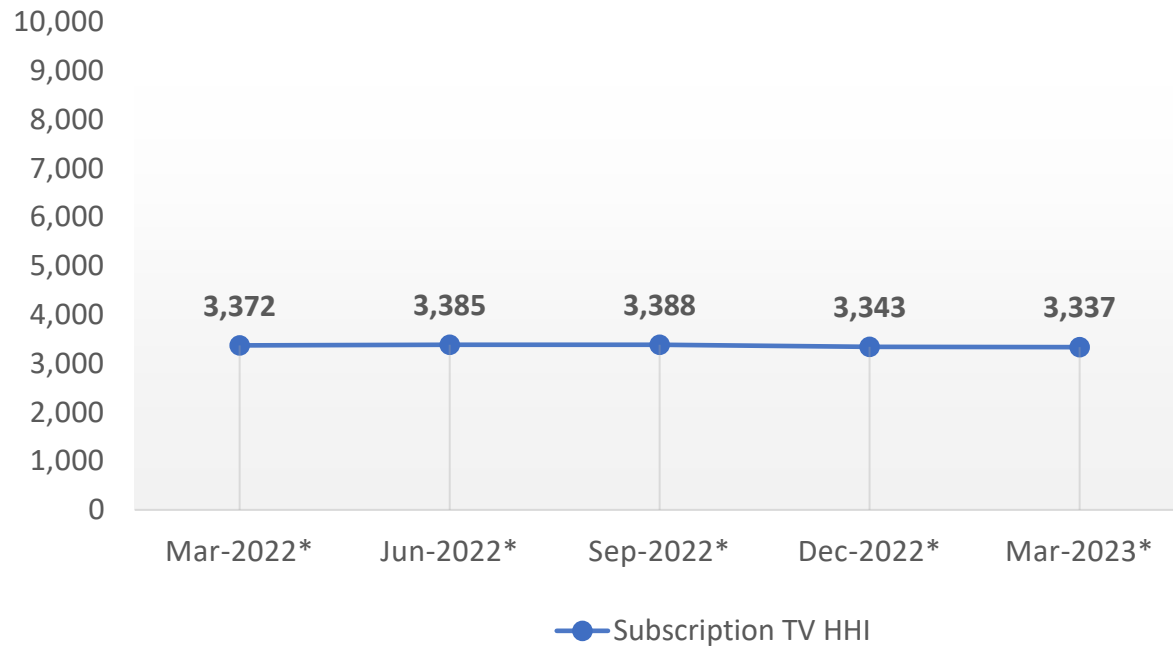


Y-o-Y  
PERCENT  
CHANGE  
**-1.0%**



Q-o-Q  
PERCENT  
CHANGE  
**-0.2%**

HHI for Subscription TV Services  
from Q1 2022 to Q1 2023



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited*

# Subscription TV Average Revenue Per User



ARPU

**\$689**



Y-o-Y  
PERCENT  
CHANGE

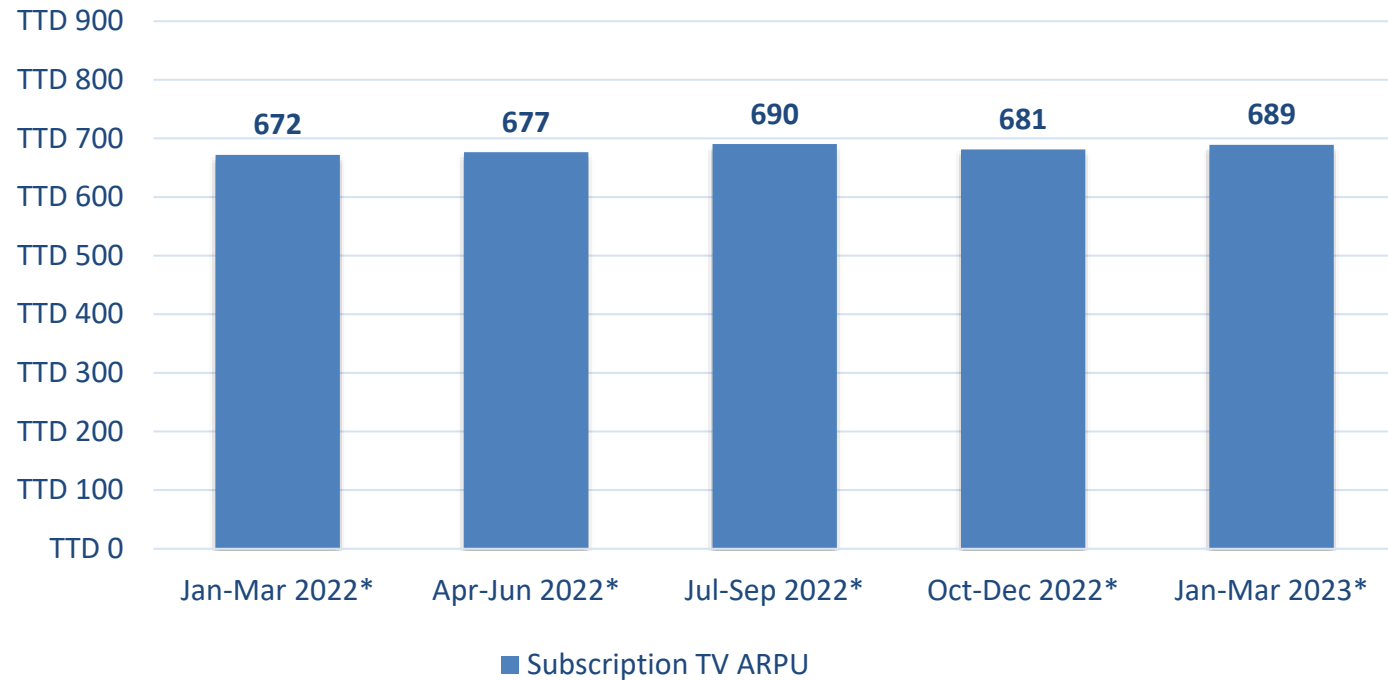
**2.5%**



Q-o-Q  
PERCENT  
CHANGE

**1.2%**

ARPU for Subscription TV Services  
from Q1 2022 to Q1 2023

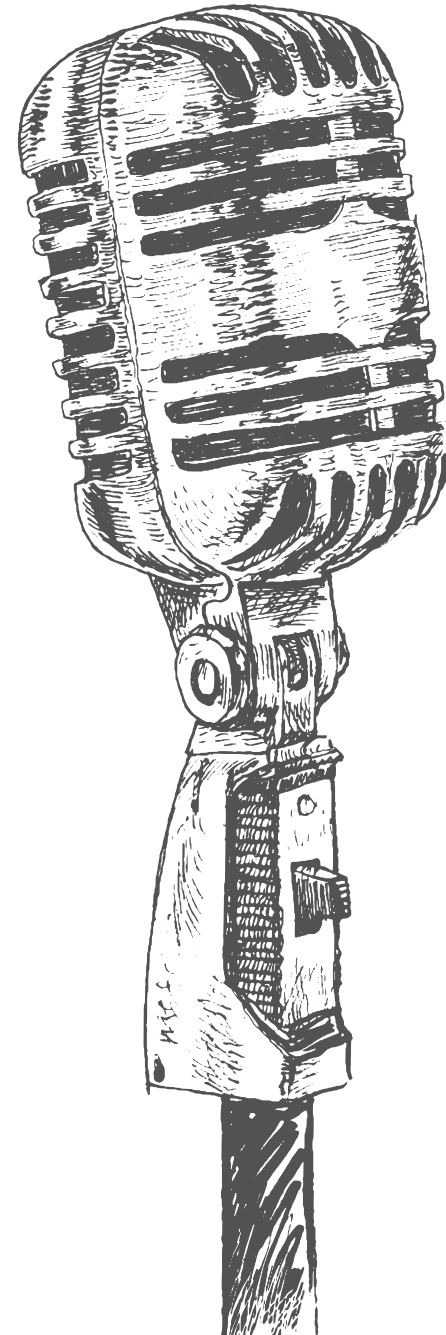


*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1-Q4 2022: Greendot Limited  
Q1 2023: Amplia Communications Limited and Greendot Limited*

# Free-to-Air Radio

6/30/2023

TATT: 2/10/1/3



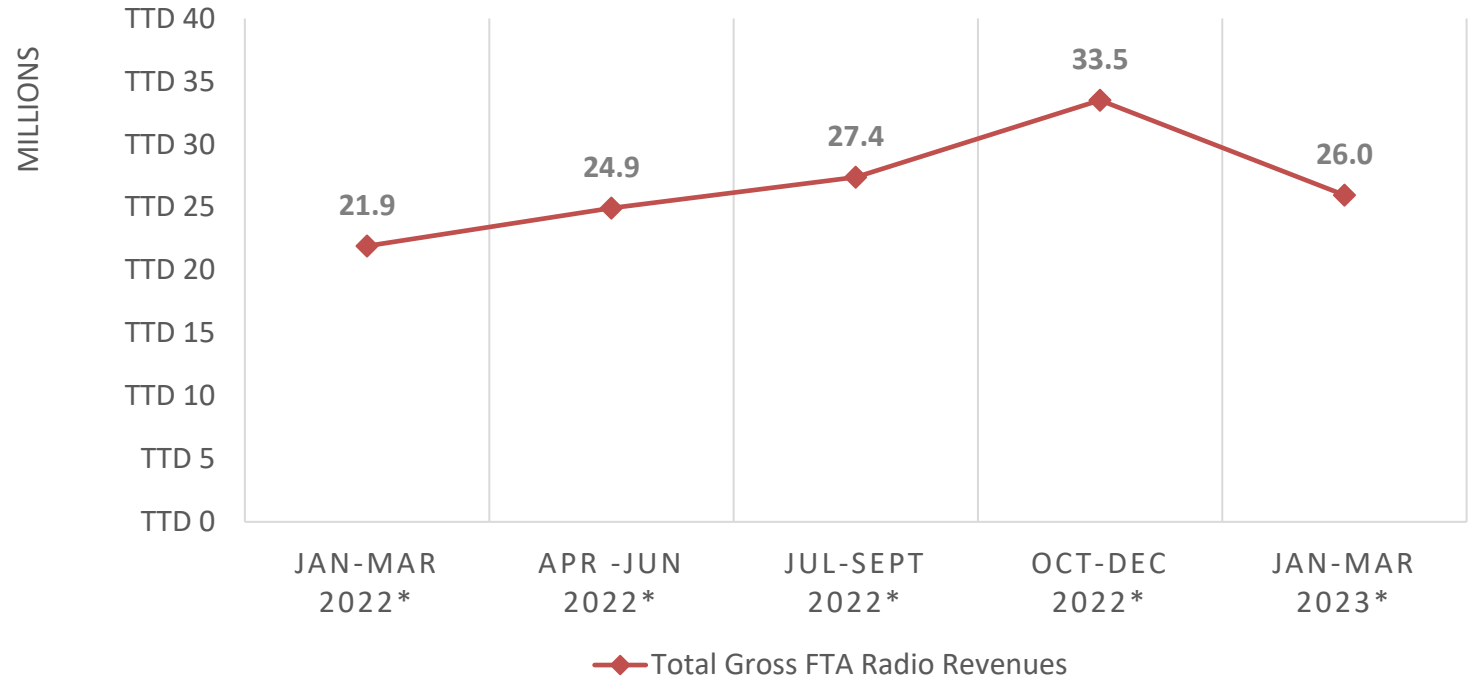
# Free-to-Air Radio Revenues

GROSS REVENUES  
**\$26m**

Y-o-Y PERCENT CHANGE  
**18.7%**

Q-o-Q PERCENT CHANGE  
**-22.4%**

Gross revenues from Free to Air Radio Services  
 From Q1 2022 to Q1 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*  
 Q1-Q4 2022: *Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network*  
 Q1 2023: *Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited*

# Free-to-Air Radio HHI



HHI  
**428**

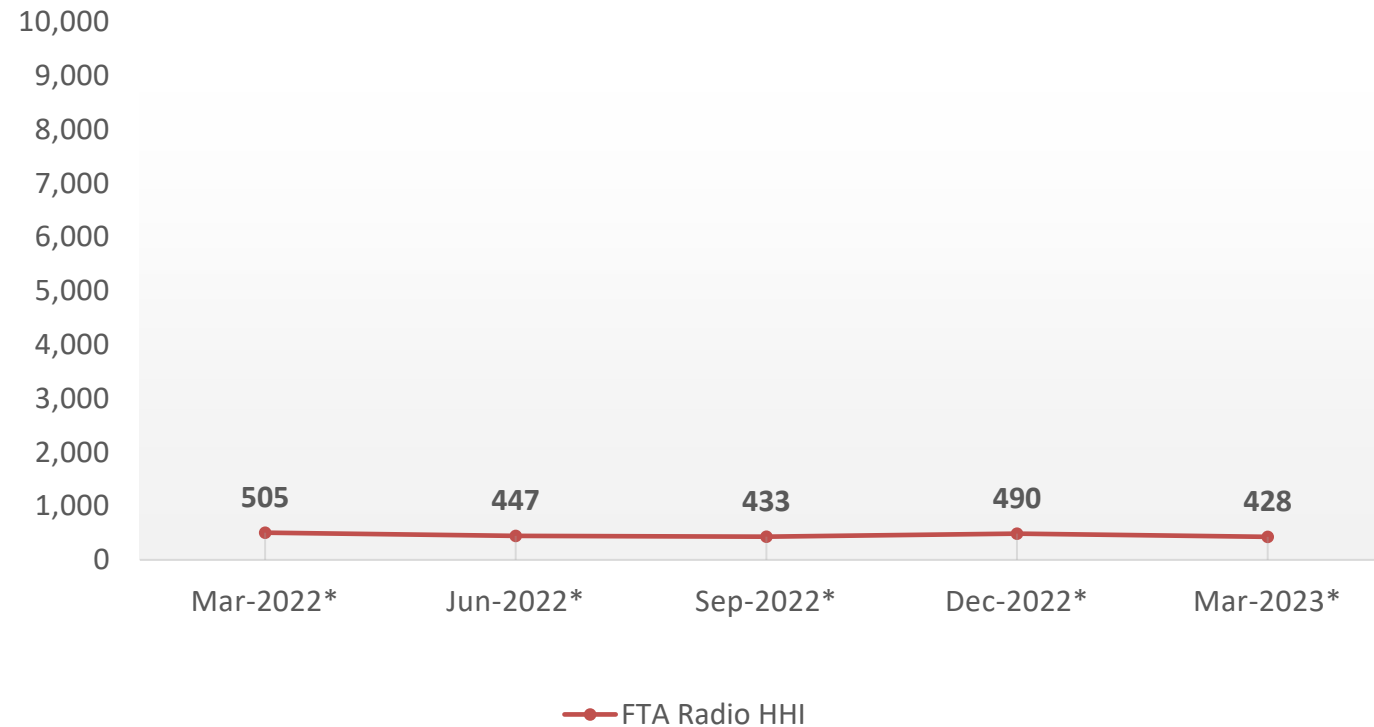


Y-o-Y  
PERCENT  
CHANGE  
**-15.2%**



Q-o-Q  
PERCENT  
CHANGE  
**-12.7%**

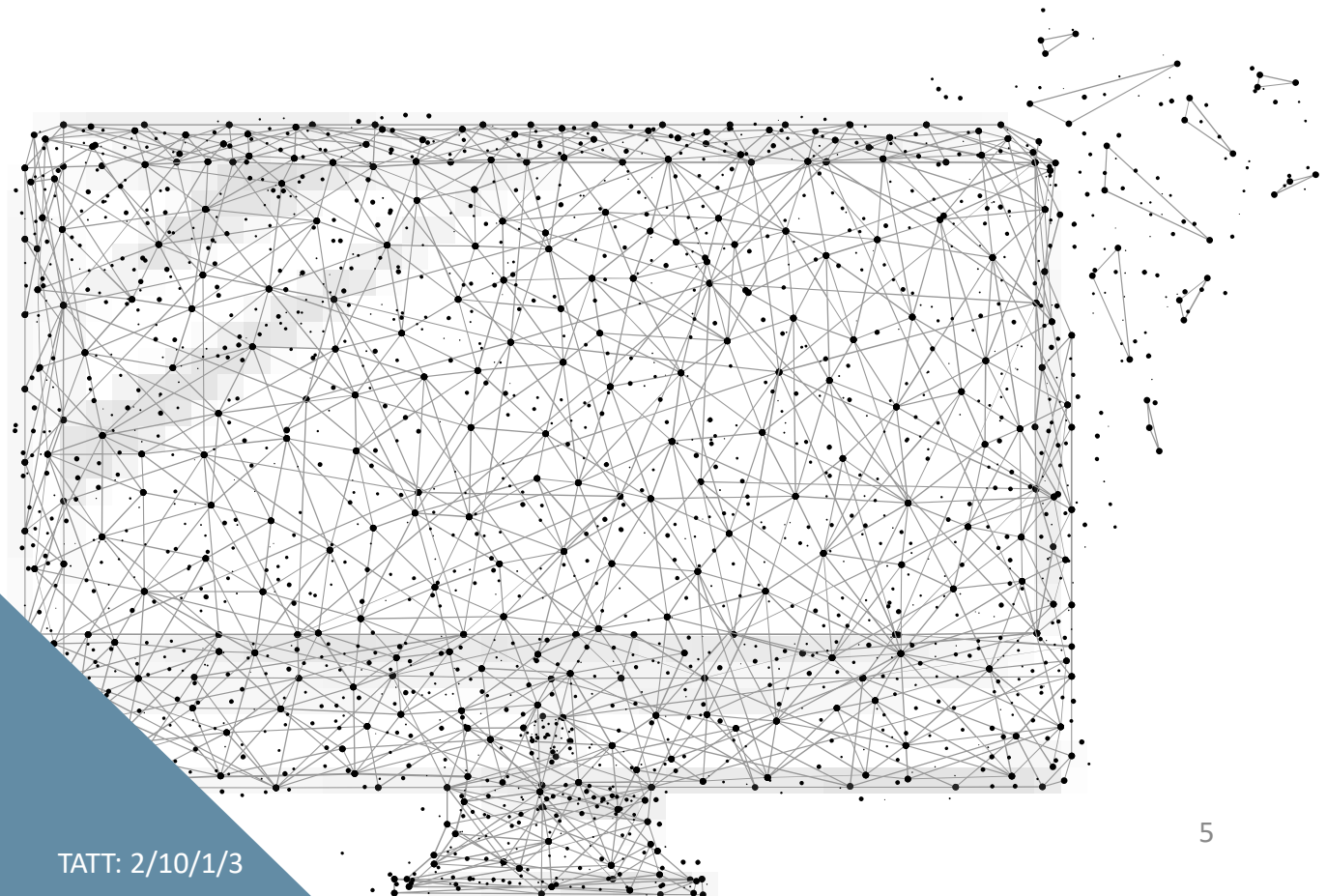
HHI for Free to Air Radio Services  
from Q1 2022 to Q1 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*  
*Q1-Q4 2022: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network*  
*Q1 2023: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited*



# Free-to-Air TV



# Free-to-Air TV Revenues



**GROSS REVENUES**

**\$9.1m**



**Y-o-Y PERCENT CHANGE**

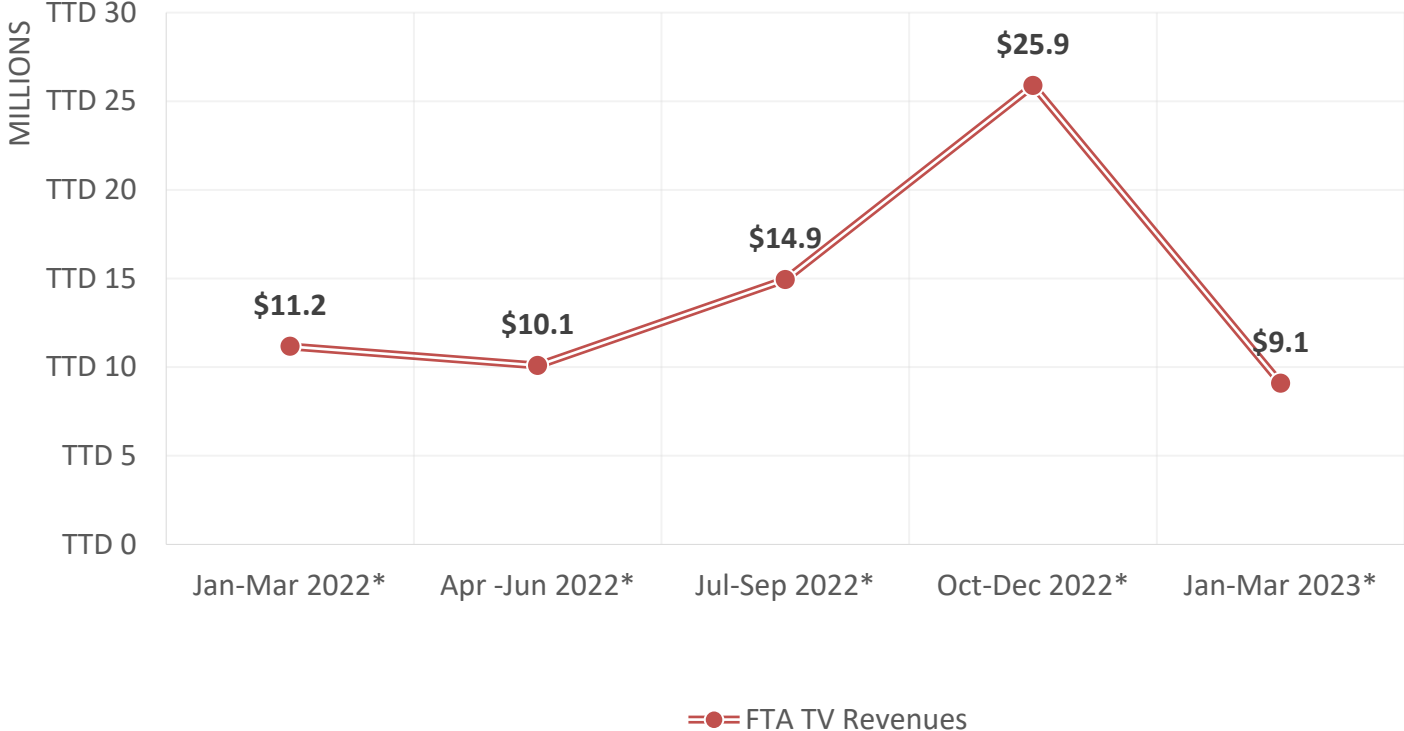
**-18.8%**



**Q-o-Q PERCENT CHANGE**

**-64.9%**

Gross Revenues from Free to Air TV Services from Q1 2022 to Q1 2023



- Data estimated for the following concessionaire who had not submitted data at the date of publication: Q1 2022 – Q1 2023: Advanced Community Network

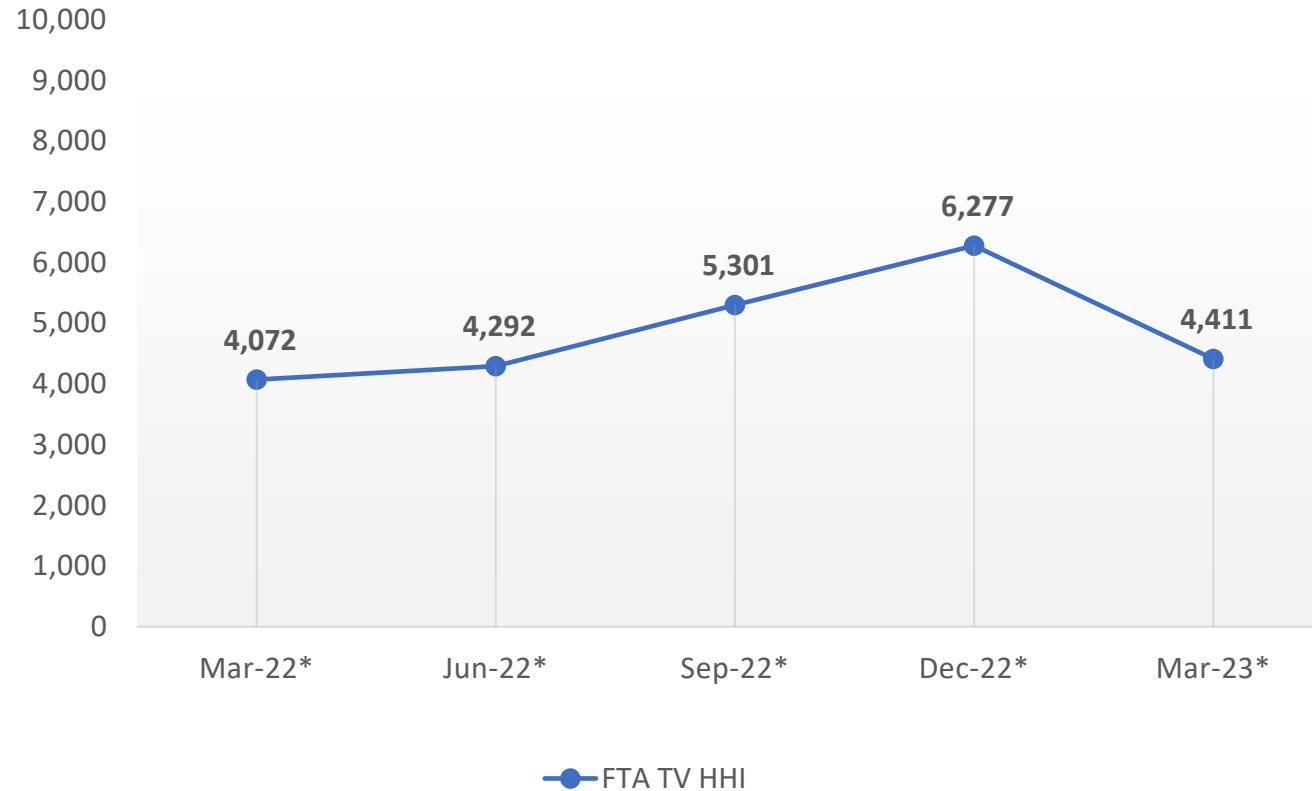
# Free-to-Air TV HHI

HHI  
**4,411**

Y-o-Y  
PERCENT  
CHANGE  
**8.3%**

Q-o-Q  
PERCENT  
CHANGE  
**-29.7%**

HHI for Free to Air TV Services  
Q1 2022 to Q1 2023

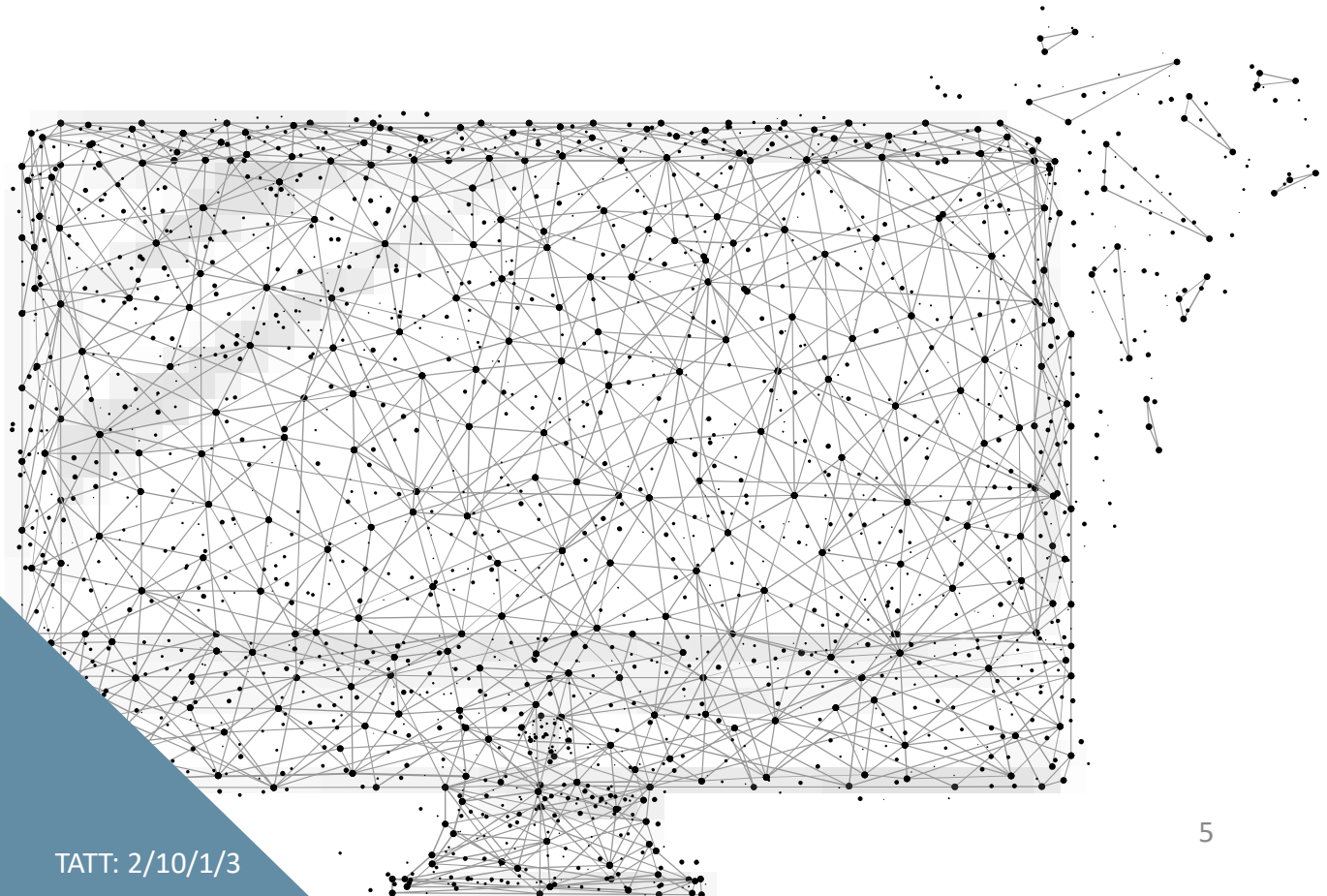


• *Data estimated for the following concessionaire who had not submitted data at the date of publication:  
Q1 2022 – Q1 2023: Advanced Community Network*

# Broadcasting Service via Cable TV

6/30/2023

TATT: 2/10/1/3



# Broadcasting Service via Cable TV Revenues



GROSS REVENUES

**\$1.7m**



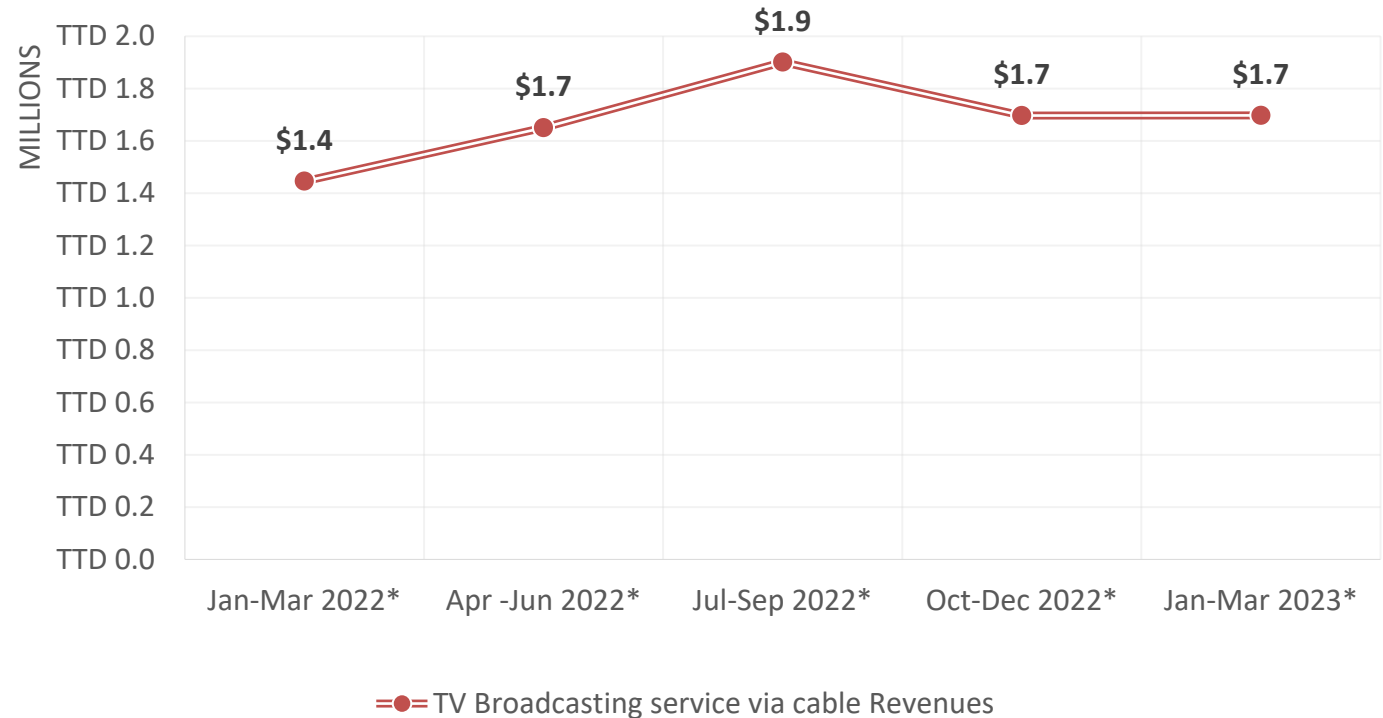
Y-o-Y PERCENT CHANGE

**21.4%**

Q-o-Q PERCENT CHANGE

**0%**

Gross Revenues Broadcasting Service via Cable from Q1 2022 to Q1 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1 2022 – Q1 2023: WI Sports*

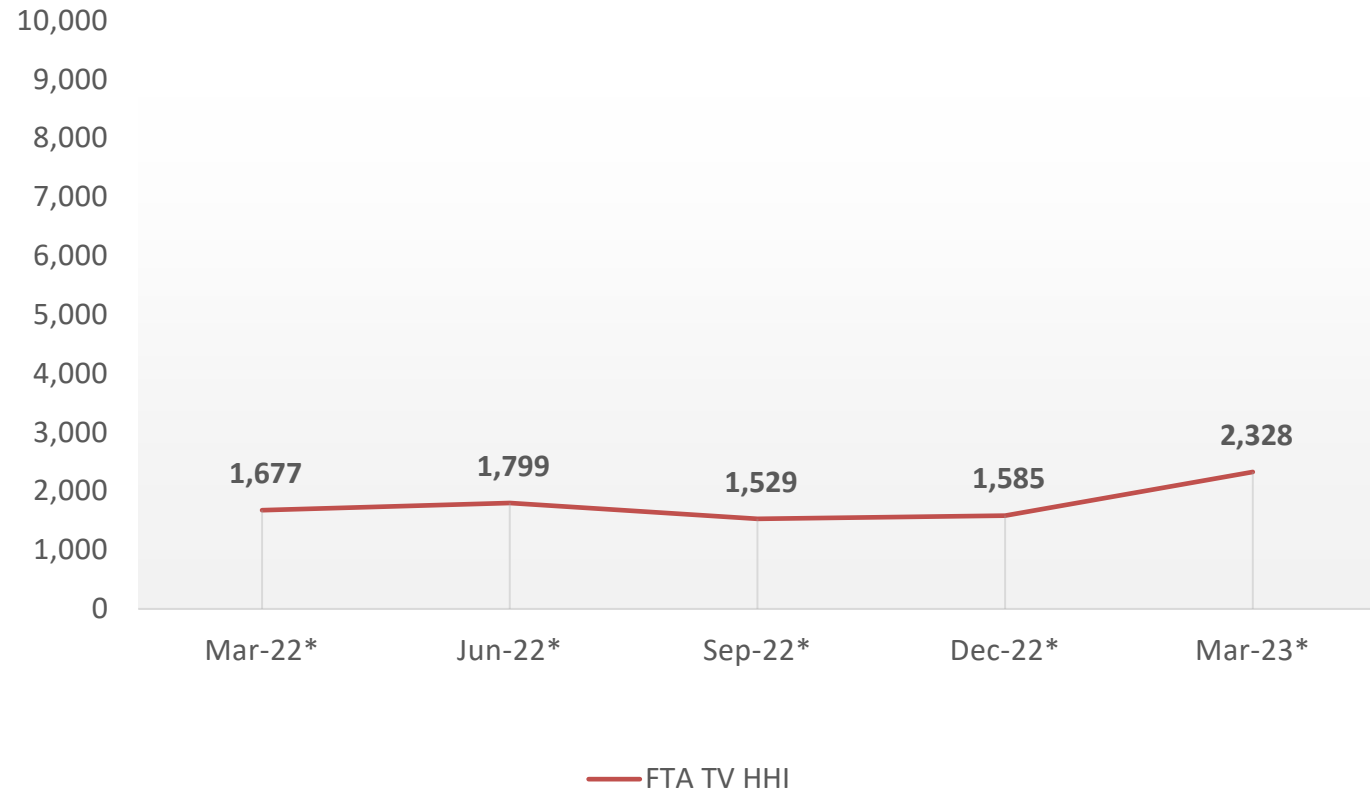
# Broadcasting Service via Cable TV Revenues

HHI  
**2,328**

Y-o-Y  
PERCENT  
CHANGE  
**38.9%**

Q-o-Q  
PERCENT  
CHANGE  
**46.9%**

HHI for Broadcasting Service via Cable  
Q1 2022 to Q1 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q1 2022 – Q1 2023: WI Sports*

# QUARTERLY MARKET UPDATE

January to March 2023

