

QUARTERLY MARKET UPDATE

April to June 2023



Quarterly Market Update – Q2 2023

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TATT: 2/10/1/3

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**Broadcasting service via cable
Market**

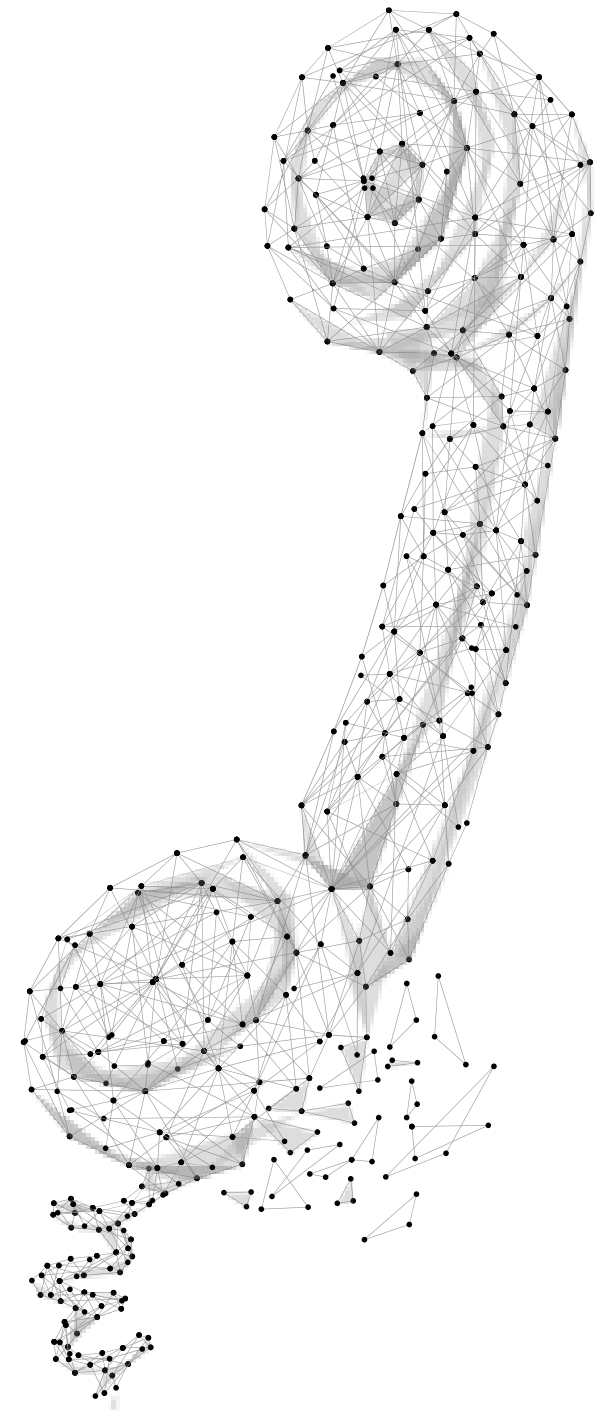
Notes

- 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

19/09/2023

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Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

317,000



Y-o-Y PERCENT CHANGE

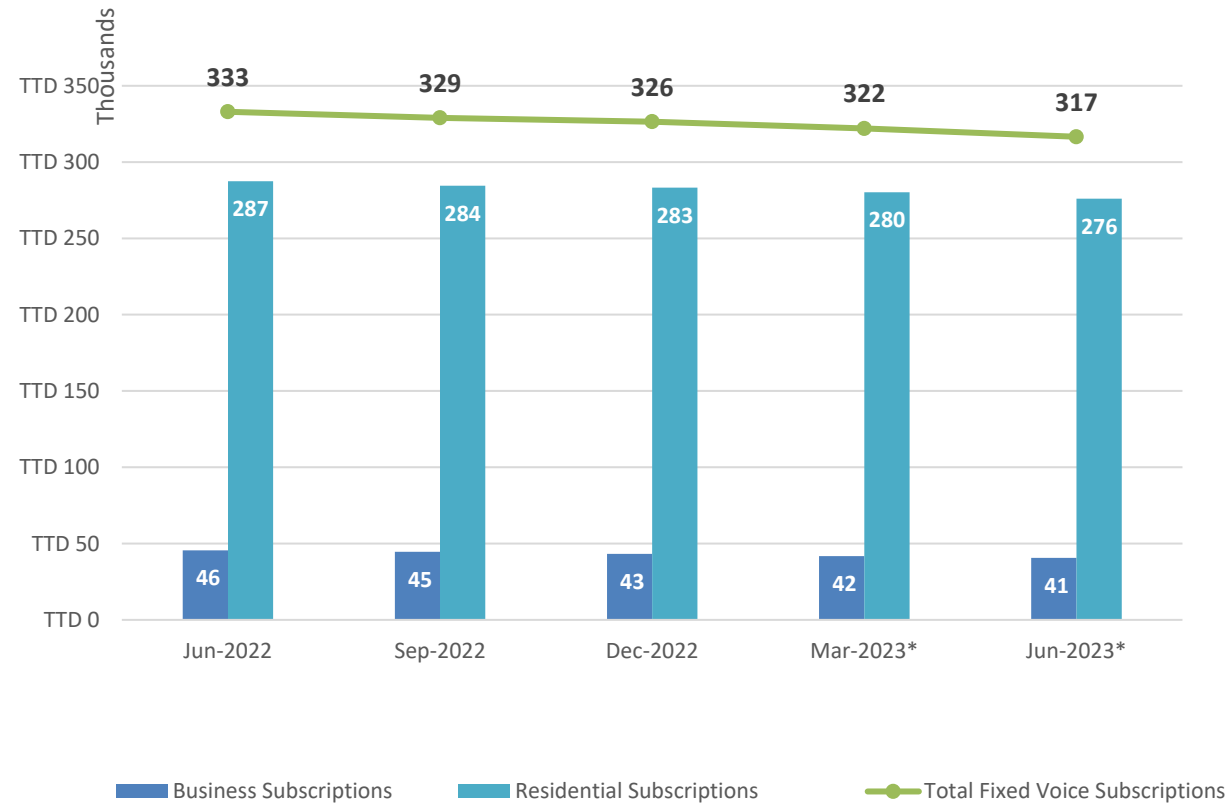
-4.8%



Q-o-Q PERCENT CHANGE

-1.6%

Number of Fixed Line Subscriptions
Q2 2022 to Q2 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**

23.2



**Y-o-Y
PERCENT
CHANGE**

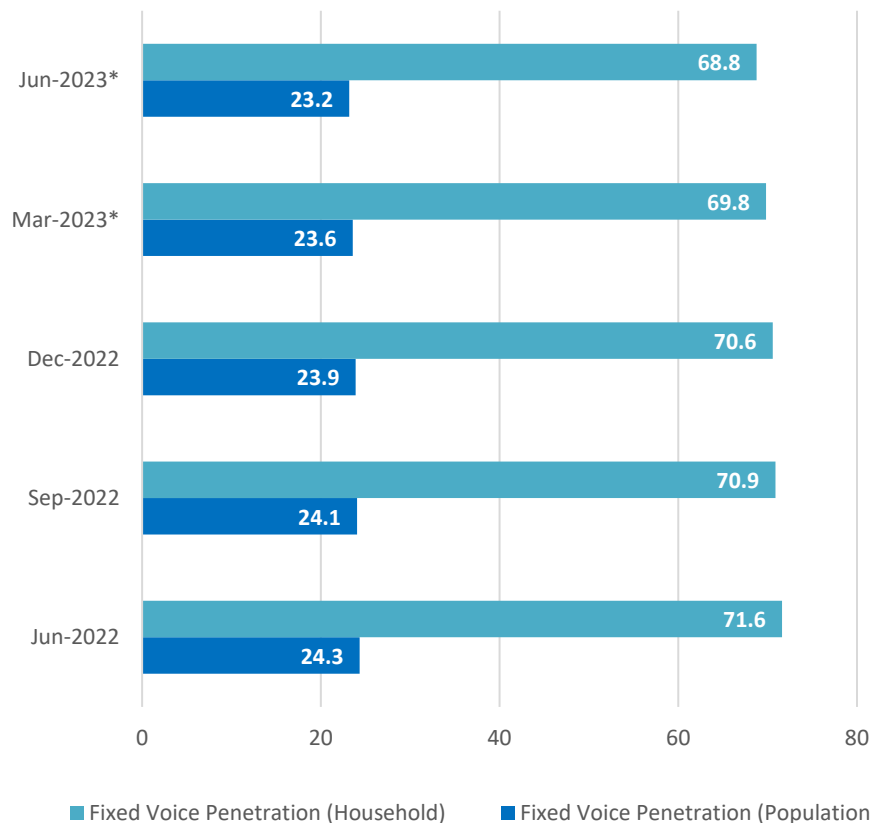
-4.5%



**Q-o-Q
PERCENT
CHANGE**

-4.1%

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

68.8



**Y-o-Y
PERCENT
CHANGE**

-3.9%



**Q-o-Q
PERCENT
CHANGE**

-1.4%

Fixed Voice Revenues



GROSS REVENUES

\$85.0m



Y-o-Y PERCENT CHANGE

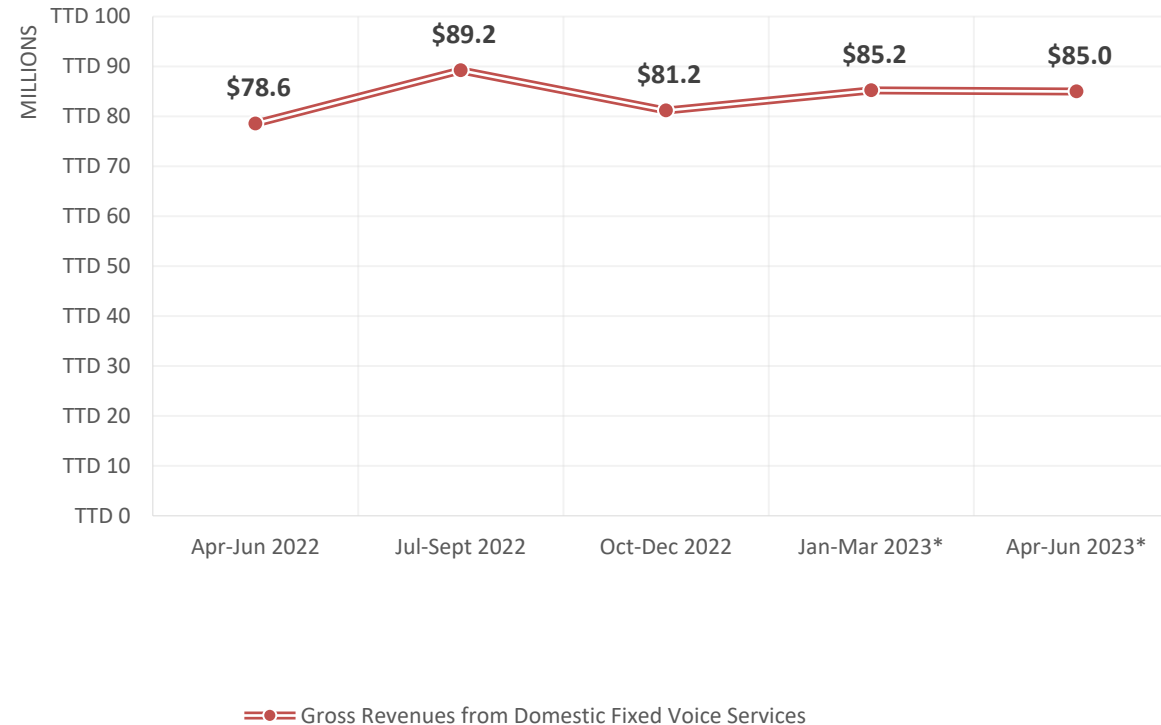
8.1%



Q-o-Q PERCENT CHANGE

-0.2%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q2 2022 TO Q2 2023



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

Fixed Voice HHI



HHI

3,366



Y-o-Y
PERCENT
CHANGE

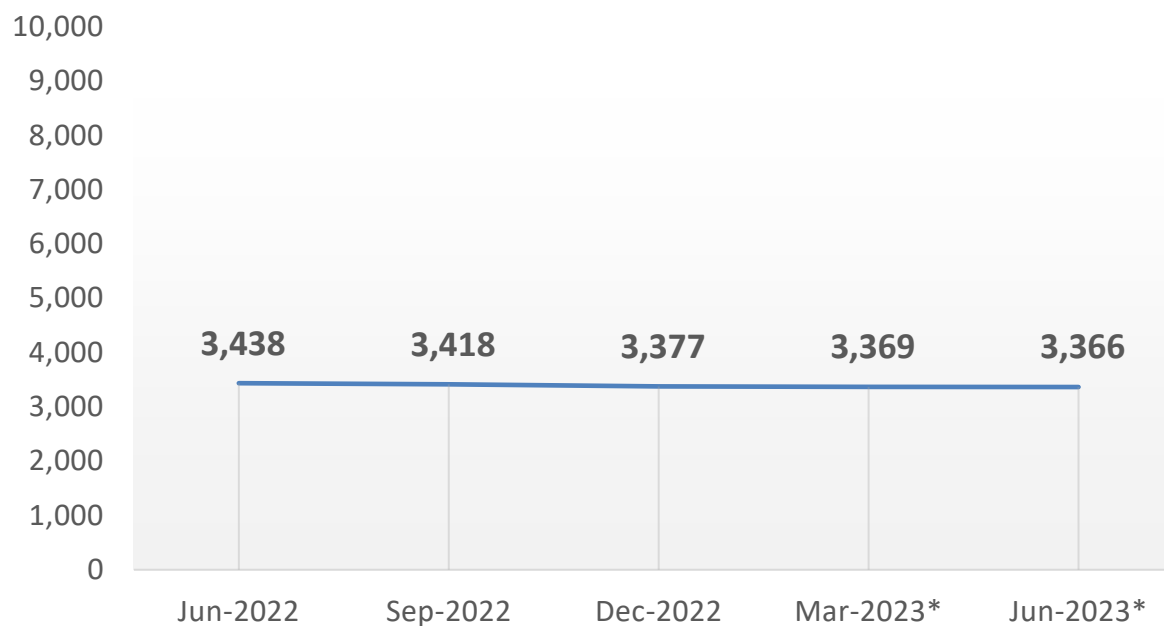
-2.1%



Q-o-Q
PERCENT
CHANGE

-0.1%

HHI for Domestic Fixed Line
from Q2 2022 to Q2 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
\$267

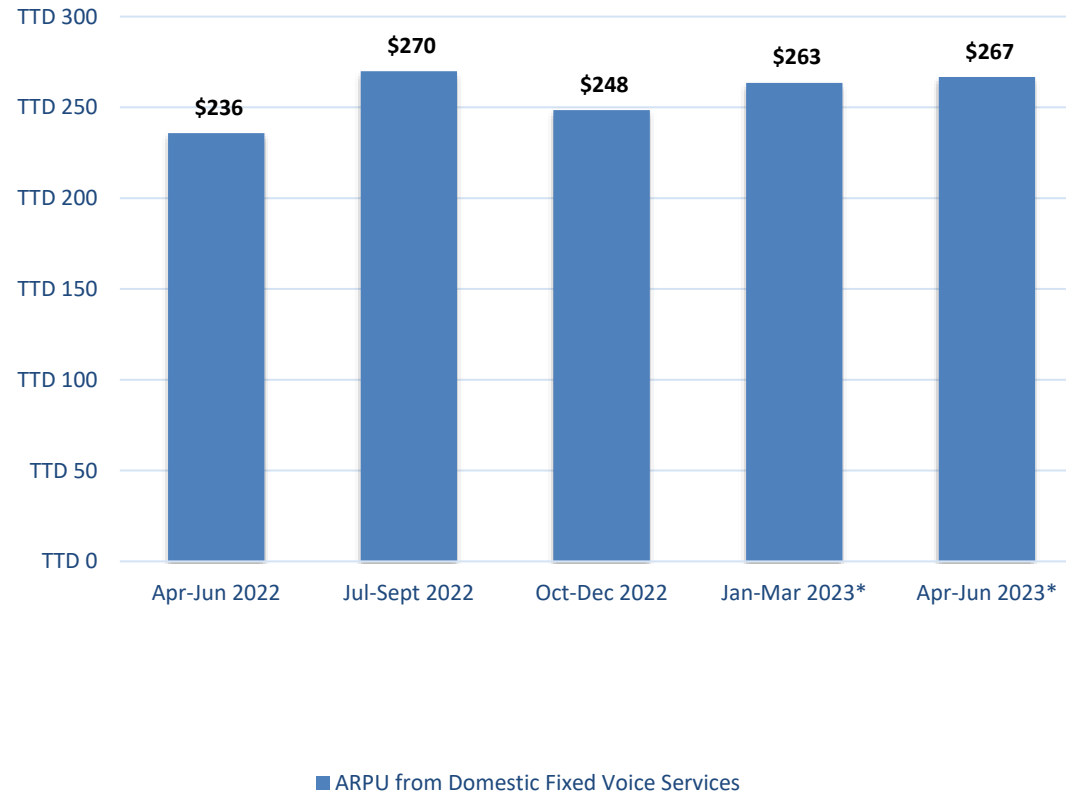


Y-o-Y
PERCENT
CHANGE
13.1%



Q-o-Q
PERCENT
CHANGE
1.5%

ARPU from Domestic Fixed Voice Services
from Q2 2022 to Q2 2023

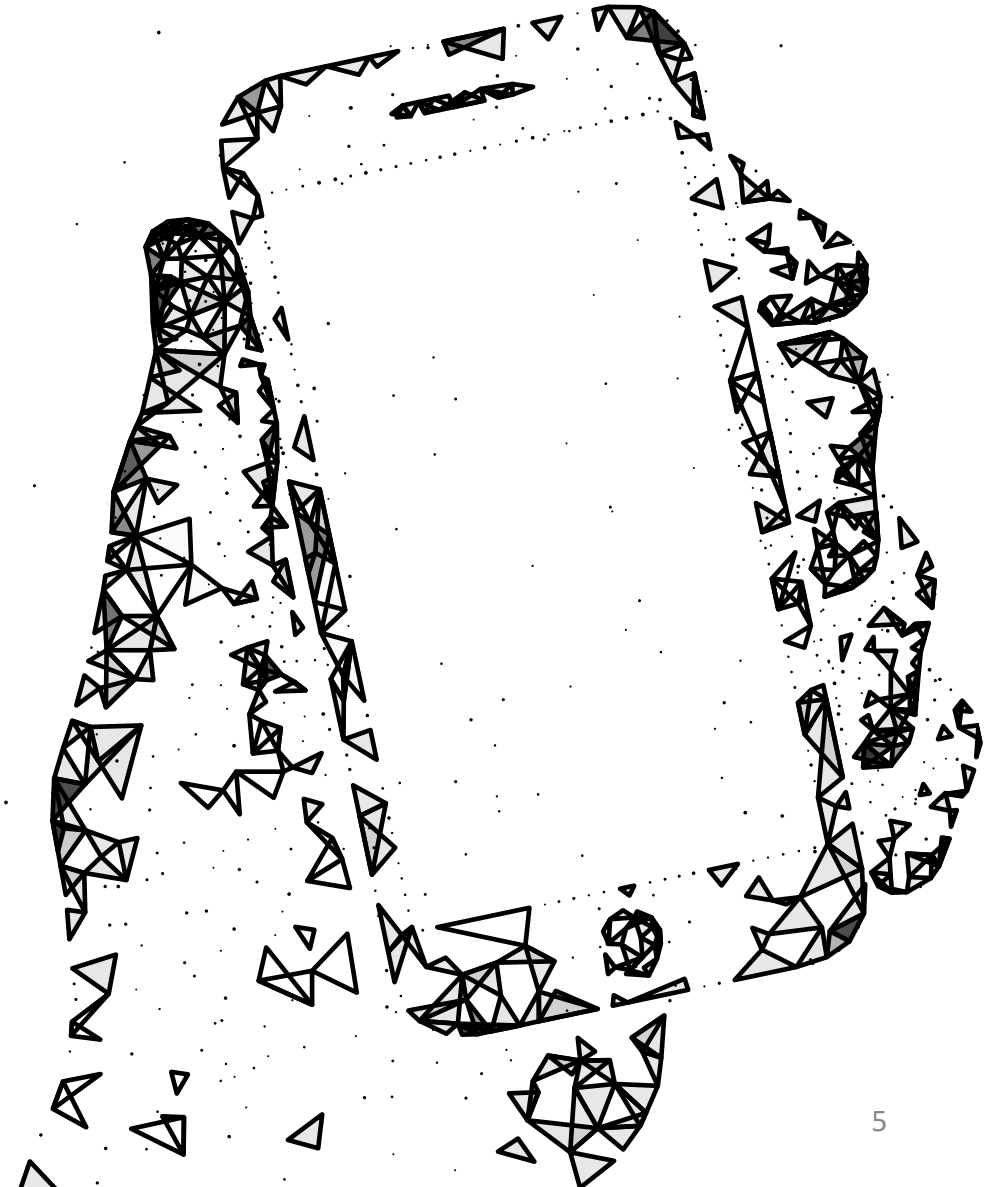


* Data estimated for the following concessionaire who had not submitted data at the date of publication: Amplia Communications Limited

Mobile Voice

19/09/2023

TATT: 2/10/1/3



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

2,029,000



Y-o-Y PERCENT CHANGE

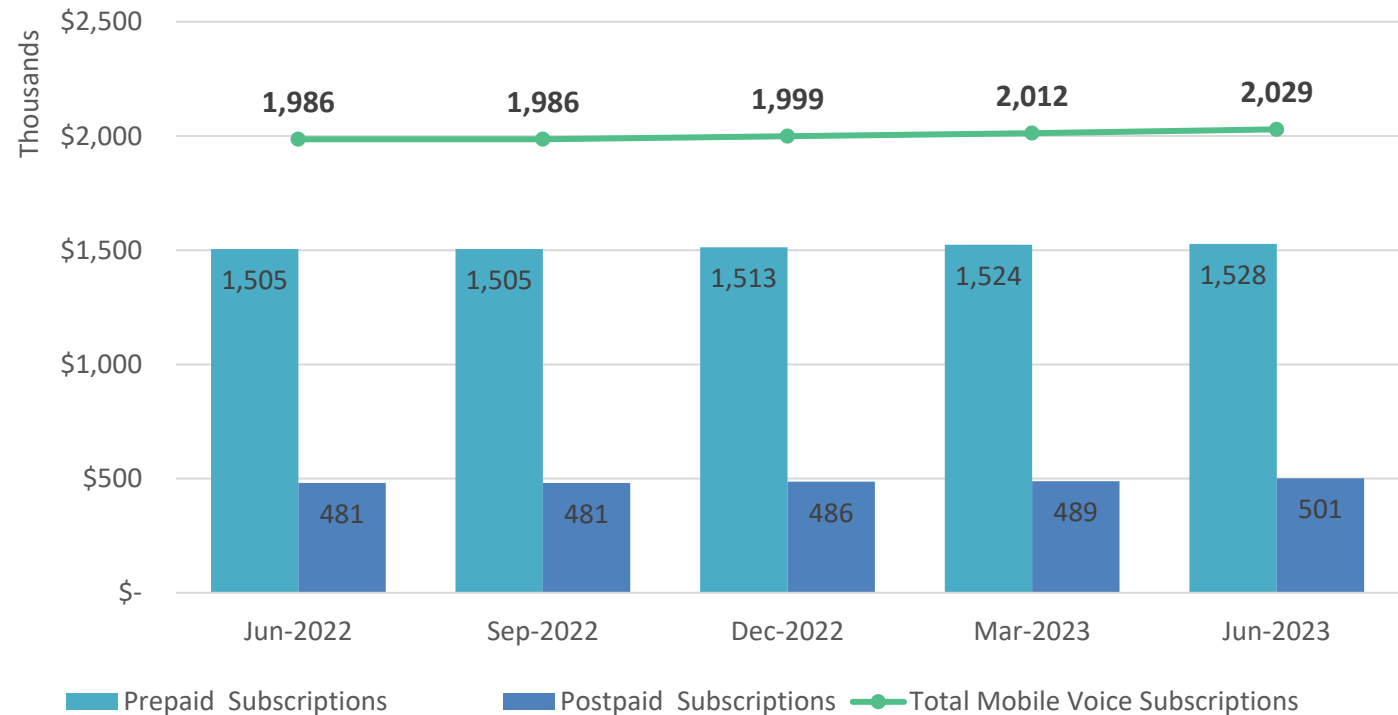
2.2%



Q-o-Q PERCENT CHANGE

0.9%

Number of Mobile Voice Subscriptions from Q2 2022 to Q2 2023



Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

149



**Y-o-Y
PERCENT
CHANGE**

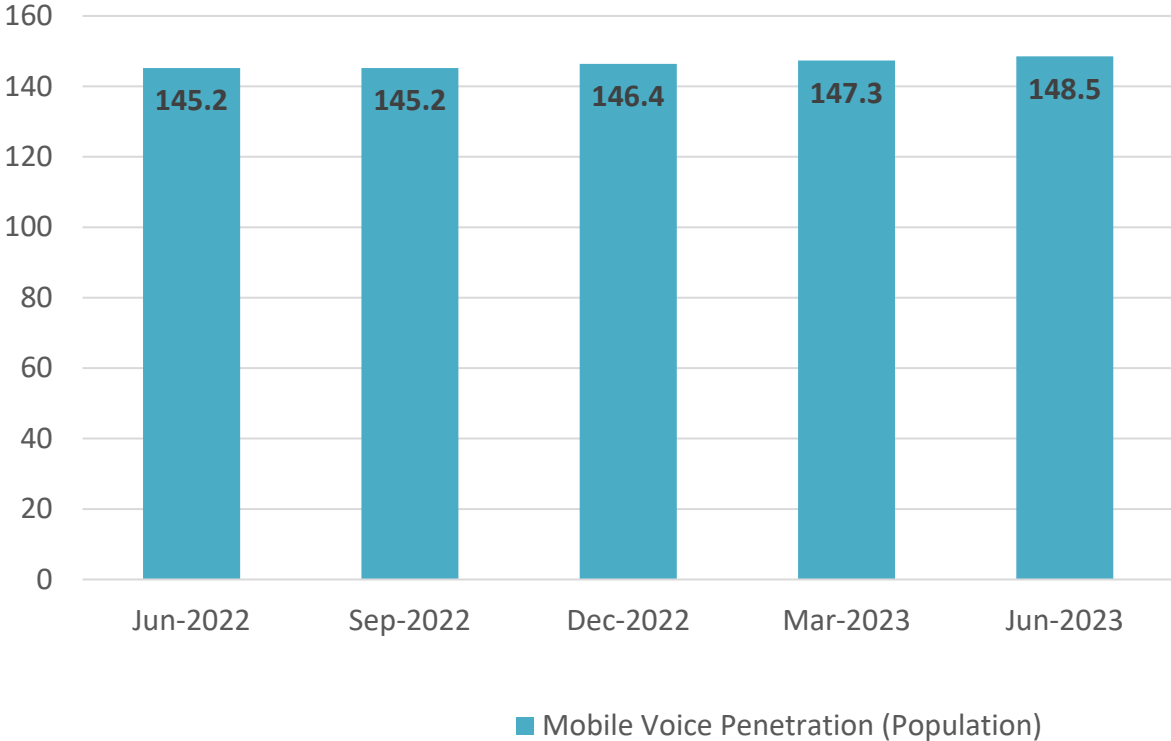
2.3%



**Q-o-Q
PERCENT
CHANGE**

0.8%

Penetration of Mobile Voice Subscriptions
from Q2 2022 to Q2 2023



Mobile Services Revenues



GROSS REVENUES

\$ 497.0m



Y-o-Y PERCENT CHANGE

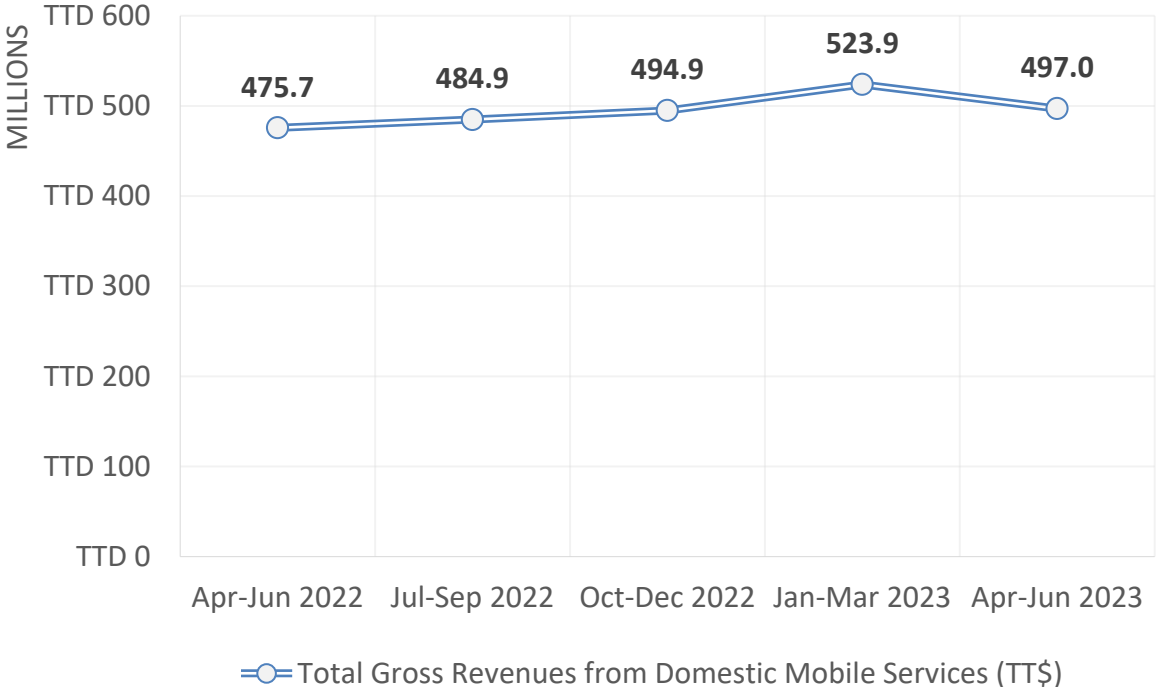
4.5%



Q-o-Q PERCENT CHANGE

-5.1%

**TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$)
FROM Q2 2023 TO Q2 2023**



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,195



Y-o-Y
PERCENT
CHANGE

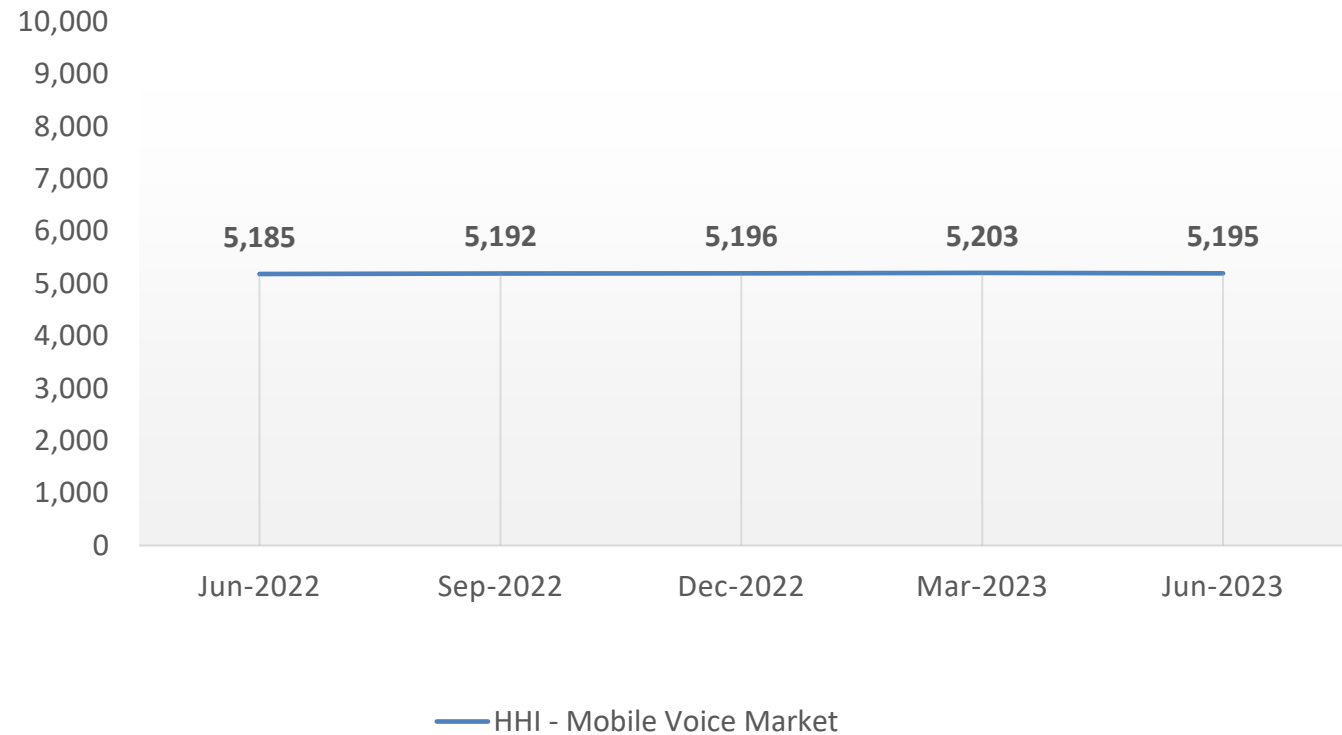
0.2%



Q-o-Q
PERCENT
CHANGE

-0.2%

HHI for Domestic Mobile Services
from Q2 2022 to Q2 2023



Average Revenue Per User

Mobile Services



ARPU
\$246



Y-o-Y
PERCENT
CHANGE

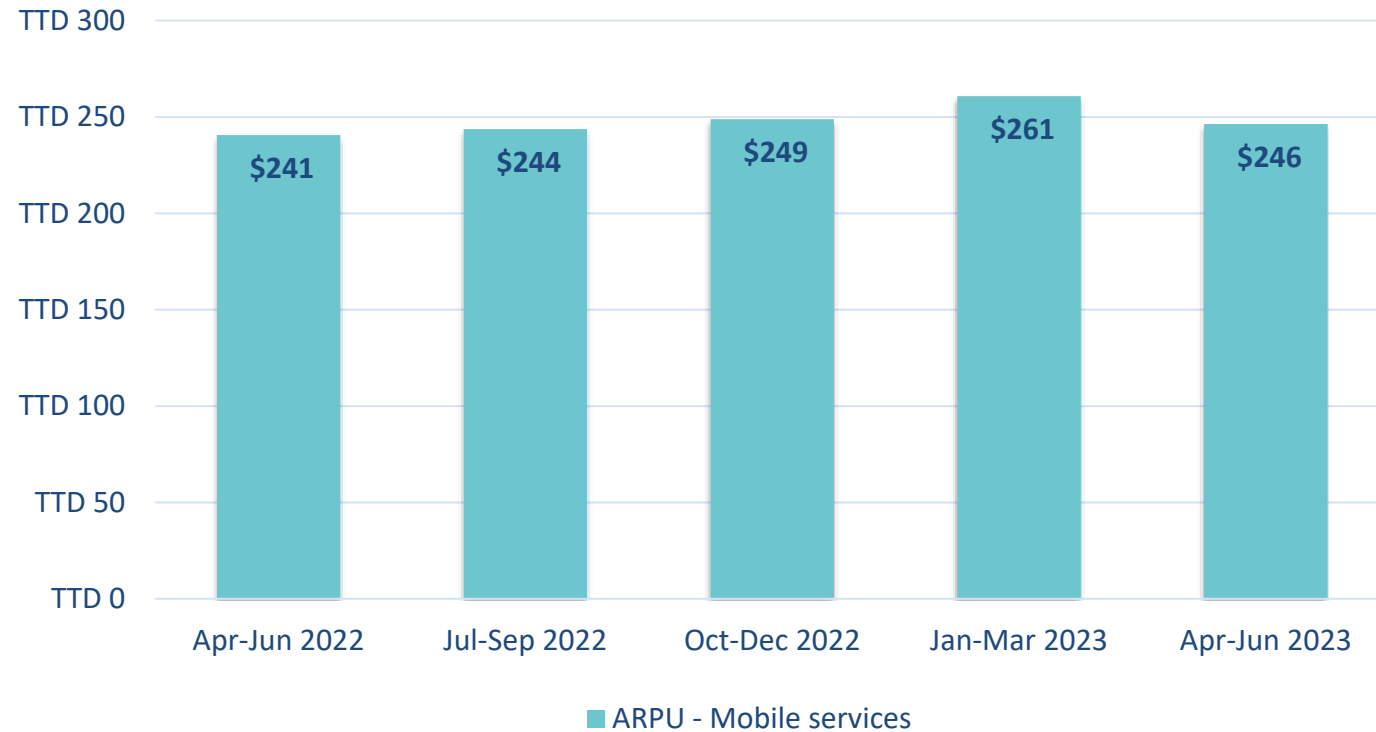
2.1%



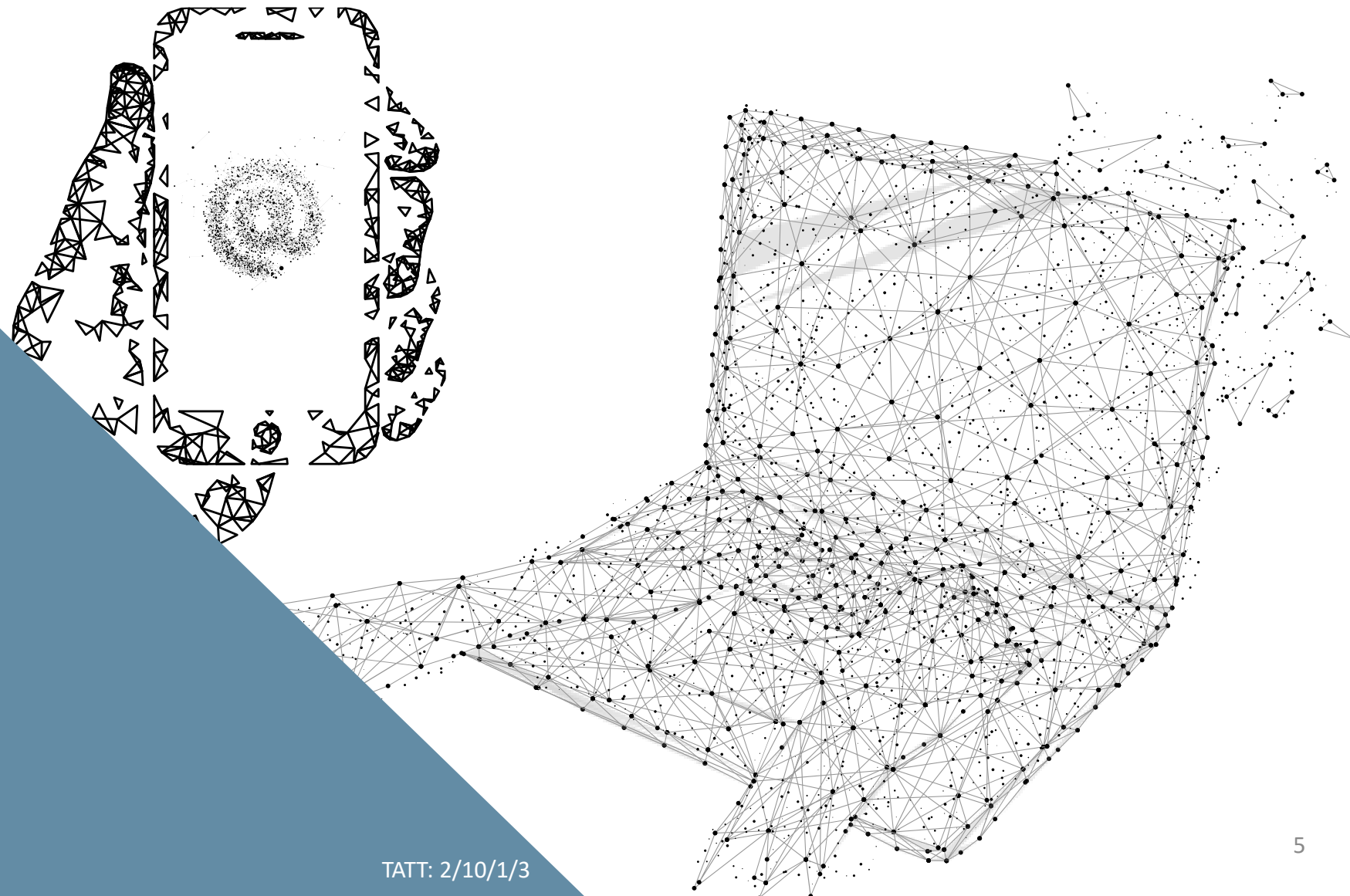
Q-o-Q
PERCENT
CHANGE

-5.8%

ARPU for Domestic Mobile Services
from Q2 2022 to Q2 2023



Internet



Fixed Broadband Subscriptions



TOTAL NUMBER OF
SUBSCRIPTIONS

392,800



Y-o-Y
PERCENT
CHANGE

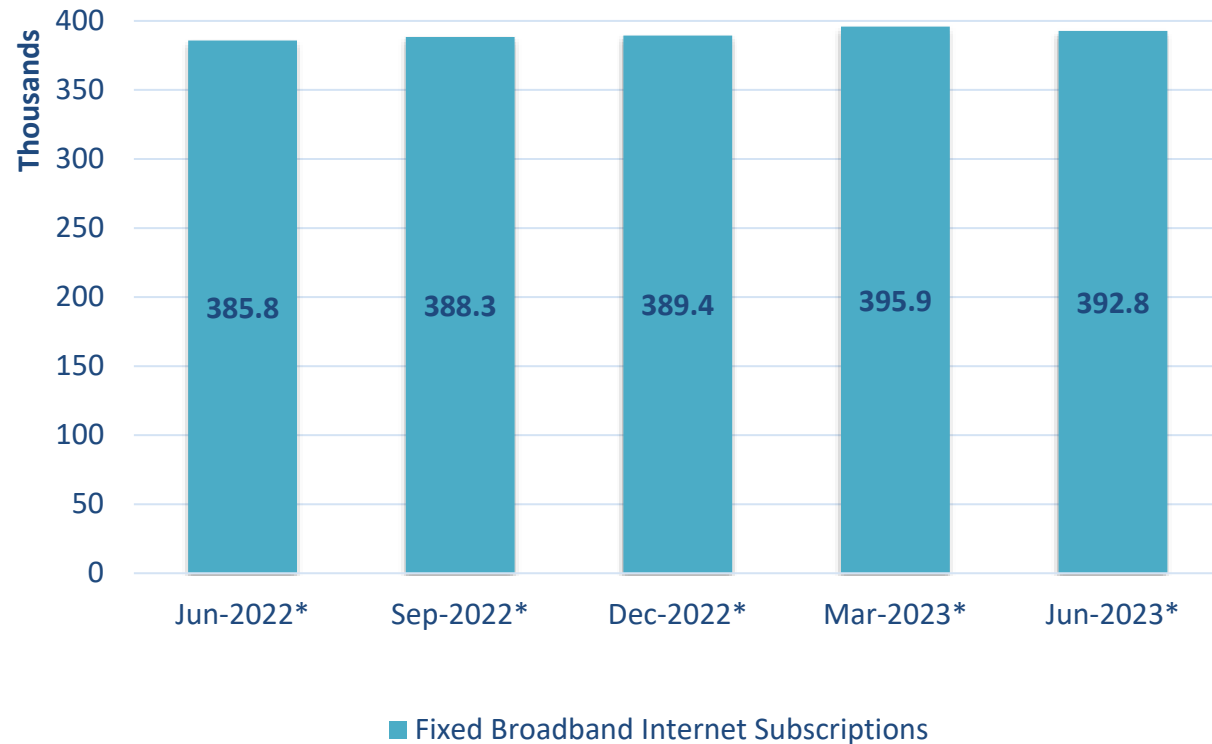
1.8%



Q-o-Q
PERCENT
CHANGE

-0.9%

Number of Fixed Broadband Internet Subscriptions
from Q2 2022 to Q2 2023



* Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q2-Q4 2022: Greendot Limited
Q1-Q2 2023: Amplia Communications Limited and Greendot Limited

Fixed Internet Penetration



**FIXED INTERNET
PENETRATION
PER 100
INHABITANTS**

29



**Y-o-Y
PERCENT
CHANGE**

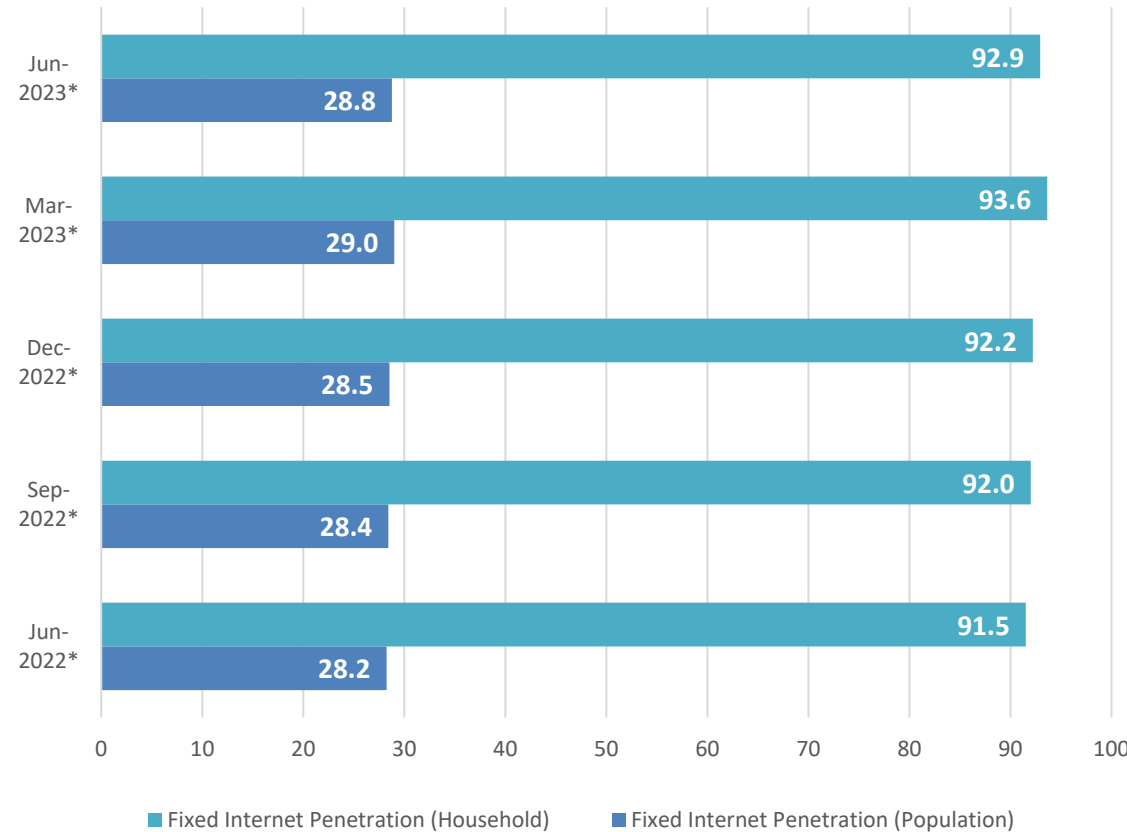
2.1%



**Q-o-Q
PERCENT
CHANGE**

-0.7%

Penetration for Fixed Internet Subscriptions
from Q2 2022 to Q2 2023



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

93



**Y-o-Y
PERCENT
CHANGE**

1.5%



**Q-o-Q
PERCENT
CHANGE**

-0.8%

** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q2-Q4 2022: Greendot Limited
Q1-Q2 2023: Amplia Communications Limited and Greendot Limited*

Mobile Internet Penetration



**MOBILE INTERNET
PENETRATION PER
100 INHABITANTS**

55



**Y-o-Y
PERCENT
CHANGE**

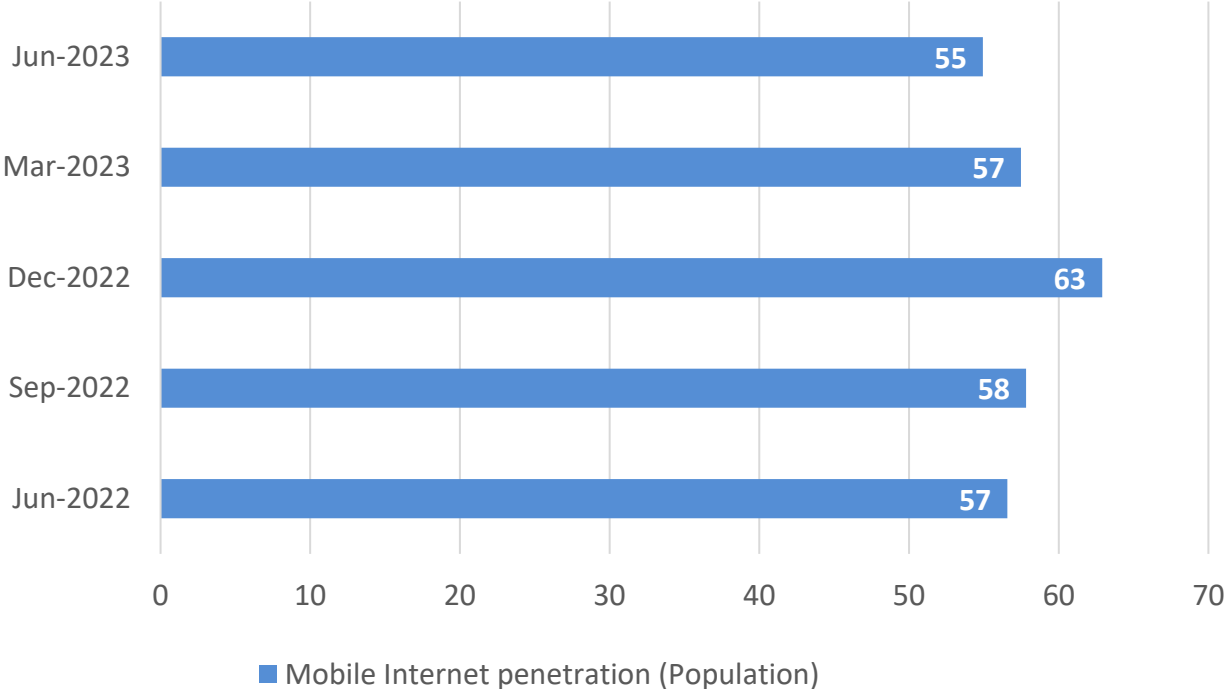
-3.5%



**Q-o-Q
PERCENT
CHANGE**

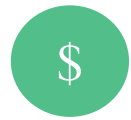
-3.5%

Penetration for Mobile Internet Subscriptions
from Q2 2022 to Q2 2023



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

Fixed Internet Revenues



GROSS REVENUES
\$ 296.2m



Y-o-Y
PERCENT
CHANGE

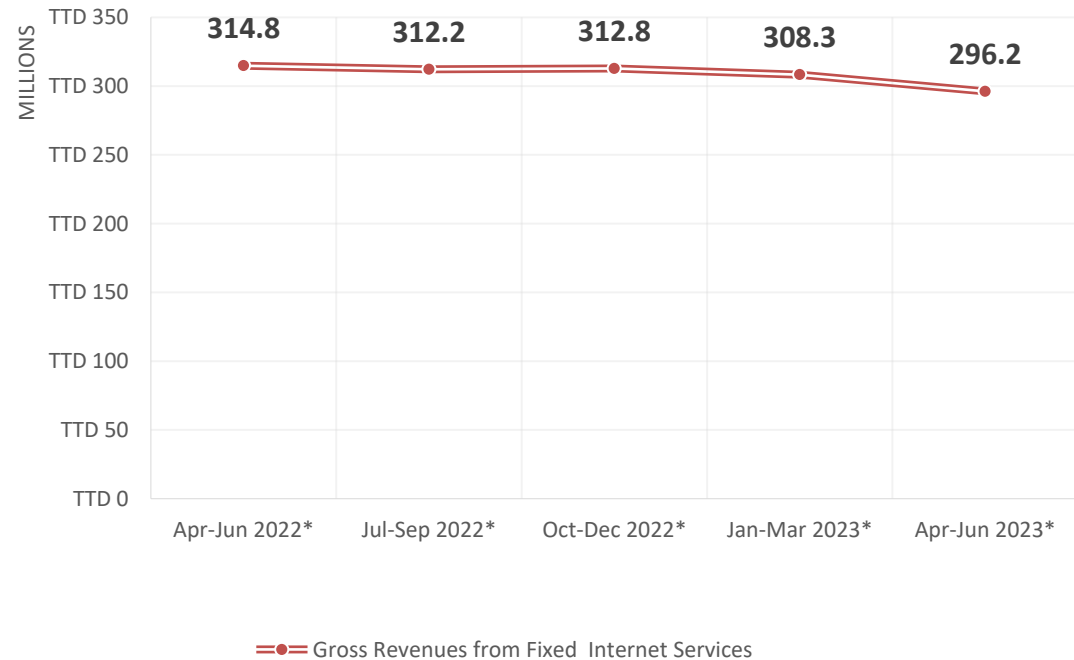
-5.9%



Q-o-Q
PERCENT
CHANGE

-3.9%

GROSS REVENUES FROM FIXED INTERNET SERVICES
FROM Q2 2022 TO Q2 2023



* Data estimated for the following concessionaires who had not submitted data at the date of publication:
 Q2-Q4 2022: Greendot Limited
 Q1-Q2 2023: Amplia Communications Limited and Greendot Limited

Fixed Internet HHI



HHI
2,759



Y-o-Y
PERCENT
CHANGE

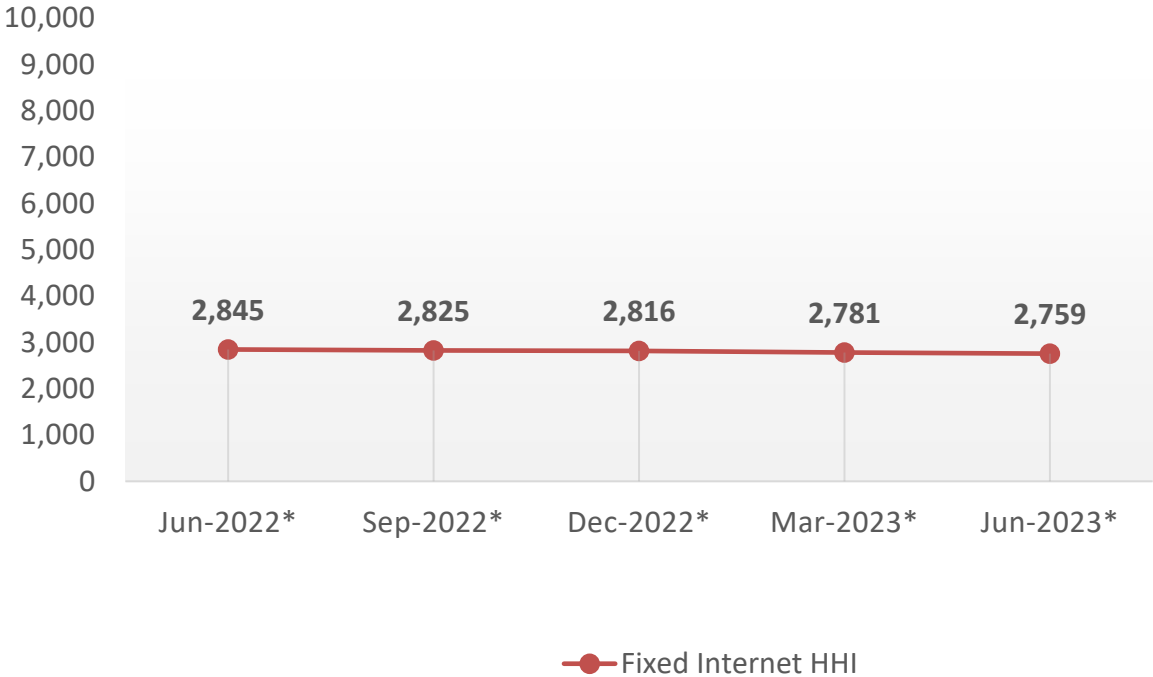
-3.0%



Q-o-Q
PERCENT
CHANGE

-0.8%

HHI for Fixed Internet Services
from Q2 2022 to Q2 2023



* Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1-Q4 2022: Greendot Limited
Q1-Q2 2023: Amplia Communications Limited and Greendot Limited

Fixed Internet Average Revenue Per User



ARPU
\$752

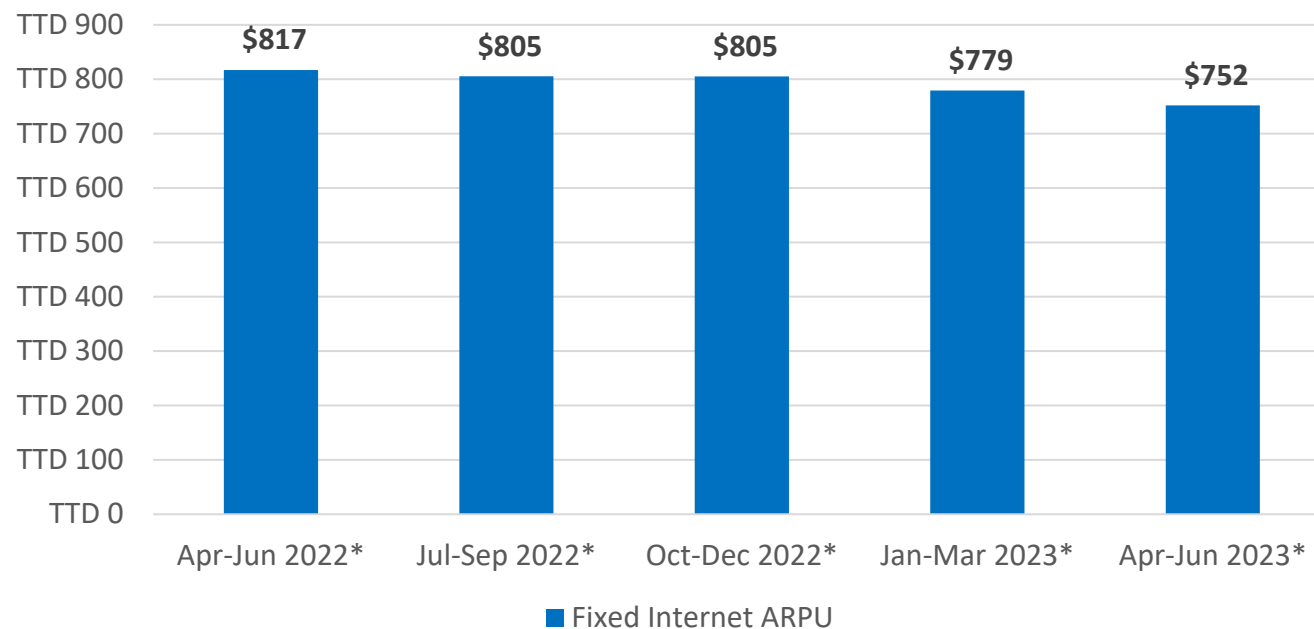


Y-o-Y
PERCENT
CHANGE
-5.2%



Q-o-Q
PERCENT
CHANGE
-3.5%

ARPU for Fixed Internet Services
from Q2 2022 to Q2 2023



* Data estimated for the following concessionaires who had not submitted data at the date of publication:
 Q2-Q4 2022: Greendot Limited
 Q1-Q2 2023: Amplia Communications Limited and Greendot Limited

Subscription TV



Subscription TV Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

211,600



Y-o-Y PERCENT CHANGE

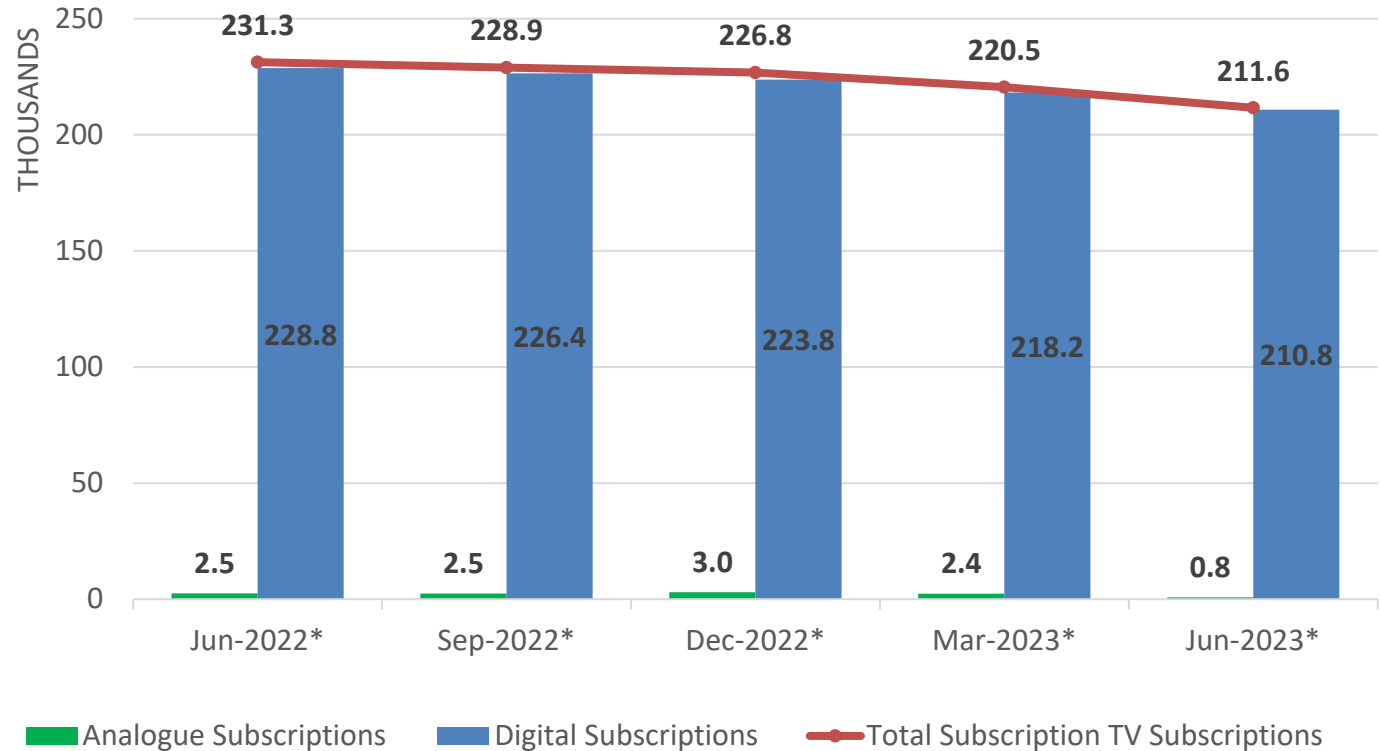
-8.5%



Q-o-Q PERCENT CHANGE

-4.0%

Number of Subscription TV Subscriptions from Q2 2022 to Q2 2023



* Data estimated for the following concessionaires who had not submitted data at the date of publication:
 Q2-Q4 2022: Greendot Limited
 Q1-Q2 2023: Amplia Communications Limited and Greendot Limited
 Q2: Trico Industries Limited

Subscription TV Penetration

SUBSCRIPTION TV
PENETRATION PER
100 INHABITANTS



15.3

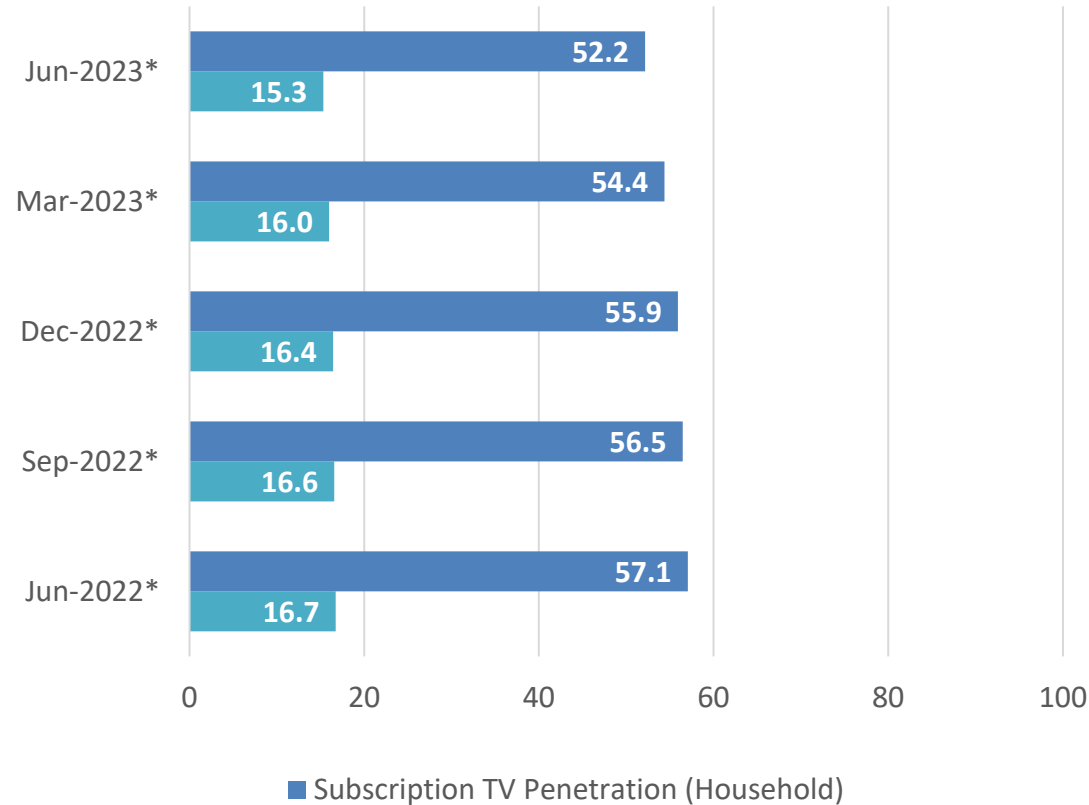
Y-o-Y
PERCENT
CHANGE

-8.4%

Q-o-Q
PERCENT
CHANGE

-4.4%

Penetration Rates of Pay TV Services
from Q2 2022 to Q2 2023



SUBSCRIPTION TV
PENETRATION PER
100 HOUSEHOLDS



52.2

Y-O-Y
PERCENT
CHANGE

-8.6%

Q-O-Q
PERCENT
CHANGE

-4.0%

* Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q2-Q4 2022: Greendot Limited
Q1 2023: Amplia Communications Limited and Greendot Limited

Subscription TV Revenues



GROSS REVENUES

\$151m



Y-o-Y PERCENT CHANGE

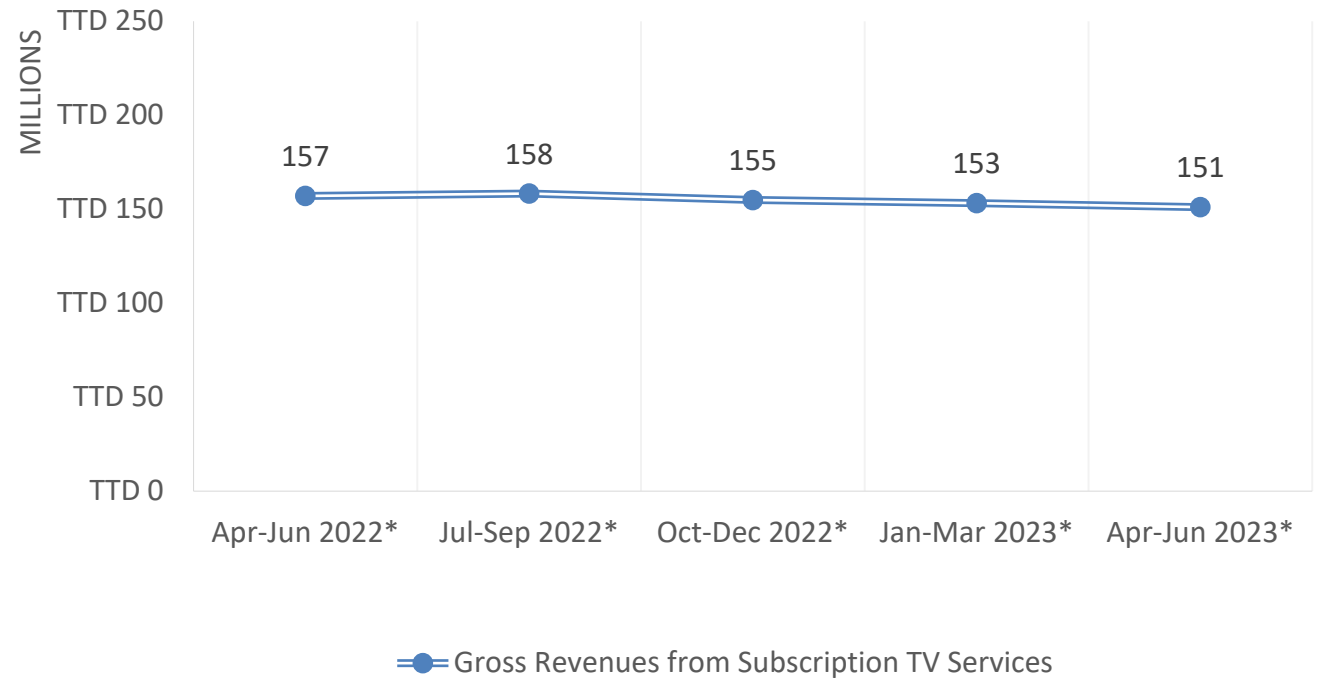
-3.8%



Q-o-Q PERCENT CHANGE

-1.3%

GROSS REVENUES FROM SUBSCRIPTION TV SERVICES FROM Q2 2022 TO Q2 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

Q2: TRICO Industries Limited

TATT: 2/10/1/3

Subscription TV HHI



HHI
3,352

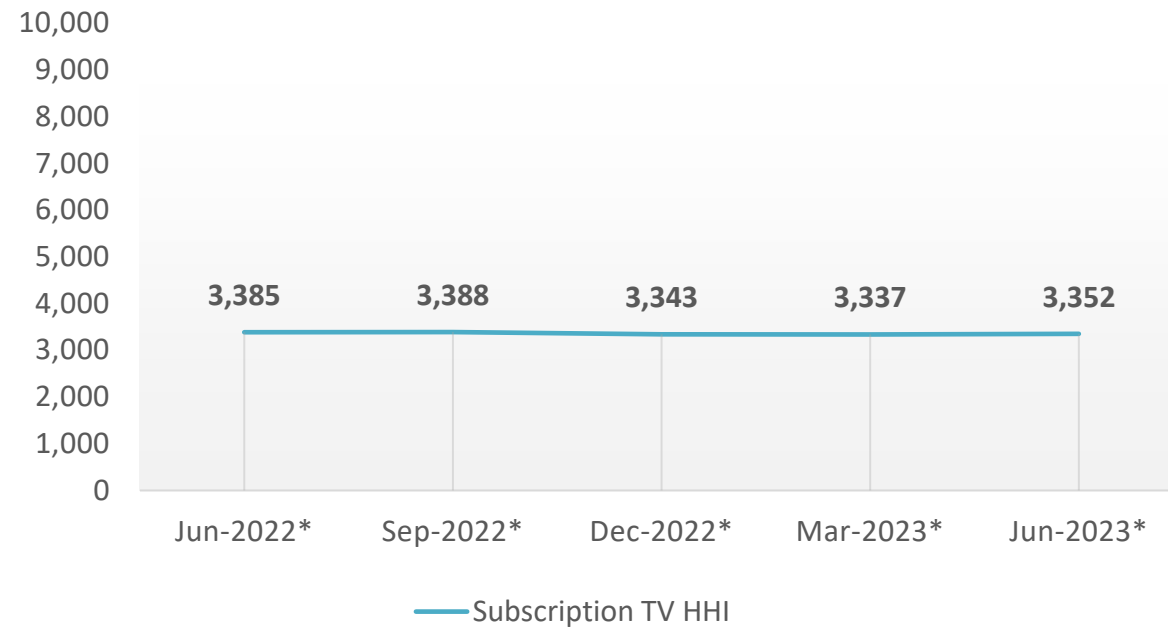


Y-o-Y
PERCENT
CHANGE
-1.0%



Q-o-Q
PERCENT
CHANGE
-1.0%

HHI for Subscription TV Services
from Q2 2022 to Q2 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
Q2: TRICO Industries Limited*

Subscription TV Average Revenue Per User

ARPU
\$ **\$704**

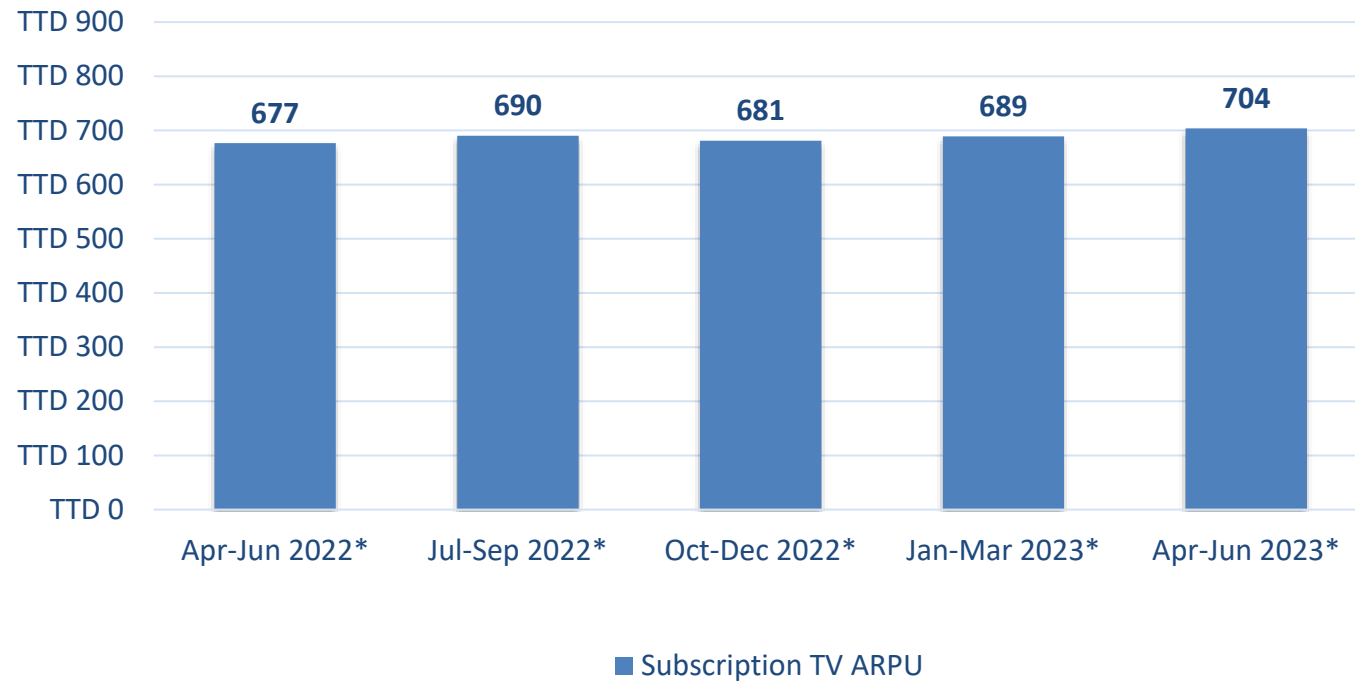


Y-o-Y
PERCENT
CHANGE
4.0%



Q-o-Q
PERCENT
CHANGE
2.2%

ARPU for Subscription TV Services
from Q2 2022 to Q2 2023

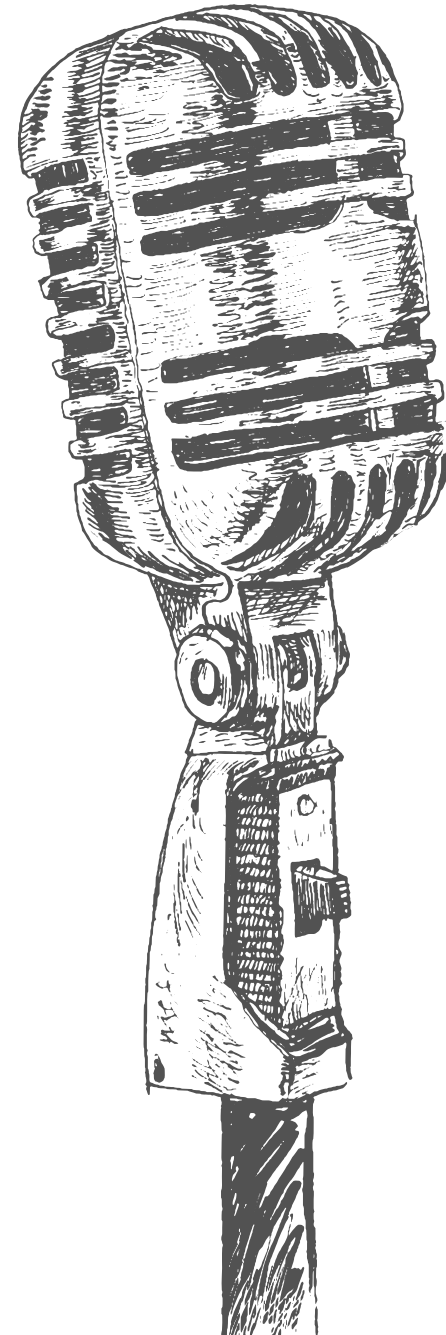


* Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1-Q4 2022: Greendot Limited
Q1 2023: Amplia Communications Limited and Greendot Limited
Q2: TRICO Industries Limited

Free-to-Air Radio

19/09/2023

TATT: 2/10/1/3



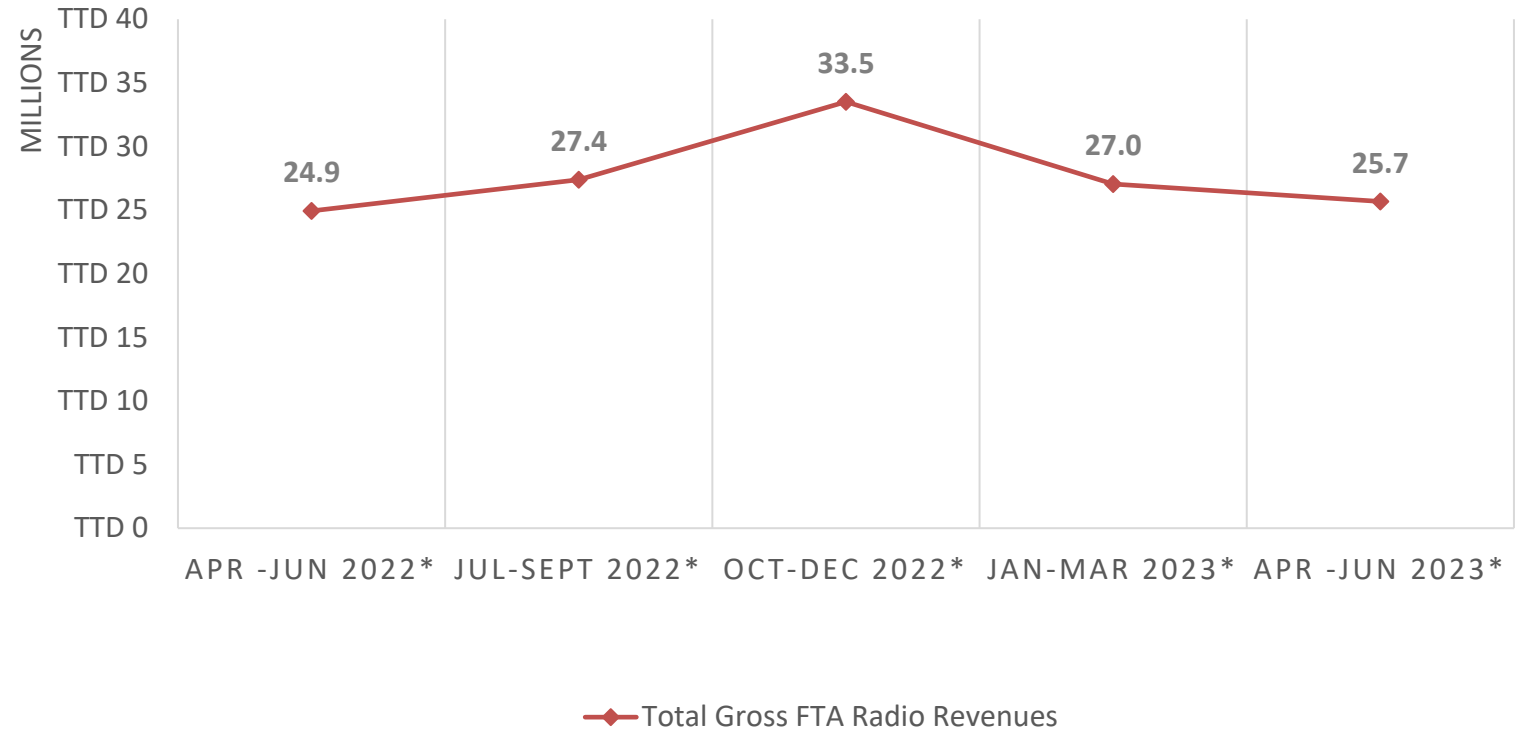
Free-to-Air Radio Revenues

GROSS REVENUES
\$25.7m

Y-o-Y PERCENT CHANGE
3.2%

Q-o-Q PERCENT CHANGE
-4.8%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q2 2022 TO Q2 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*
Q2-Q4 2022: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network
Q1 2023: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited
Q2 2023: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network, PCBT

Free-to-Air Radio HHI



HHI
461

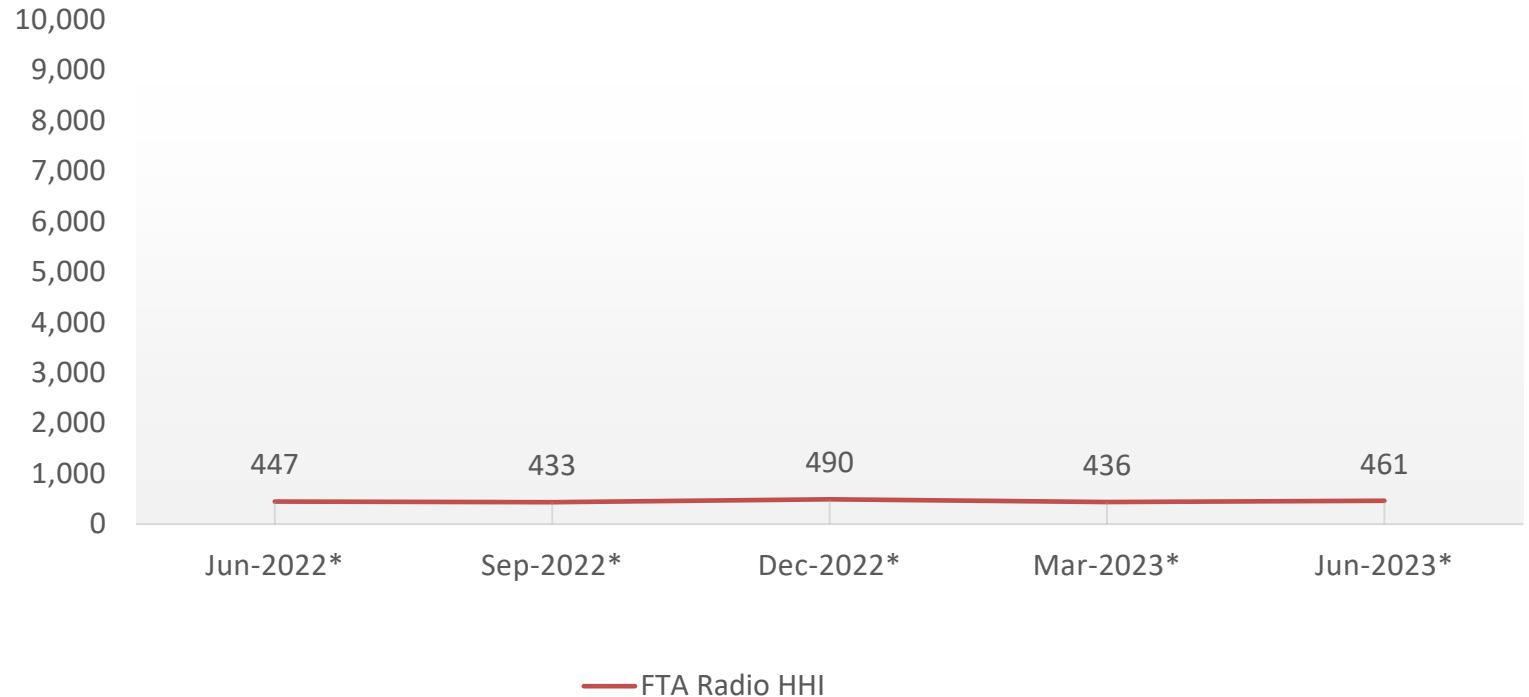


Y-o-Y
PERCENT
CHANGE
3.1%



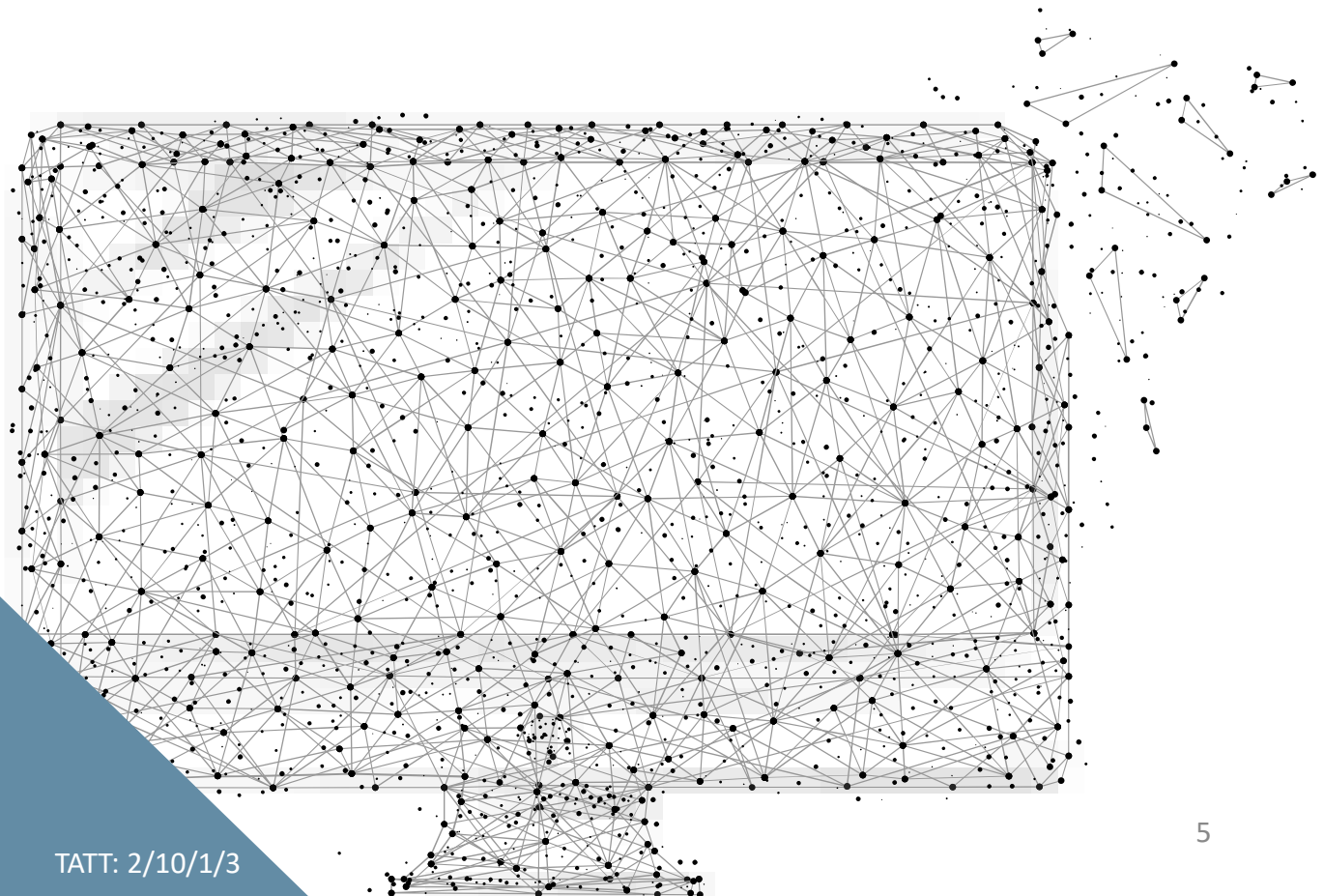
Q-o-Q
PERCENT
CHANGE
5.7%

HHI for Free to Air Radio Services
from Q2 2022 to Q2 2023



- **Data estimated for the following concessionaires who had not submitted data at the date of publication:**
Q2-Q4 2022: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network
Q1 2023: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited
Q2 2023: Kaisoca, Trinibashment Limited, Upward Trend Entertainment Limited, Trinidad and Tobago Radio Network, PCBT

Free-to-Air TV



Free-to-Air TV Revenues



GROSS REVENUES

\$10.1m

Y-o-Y PERCENT CHANGE

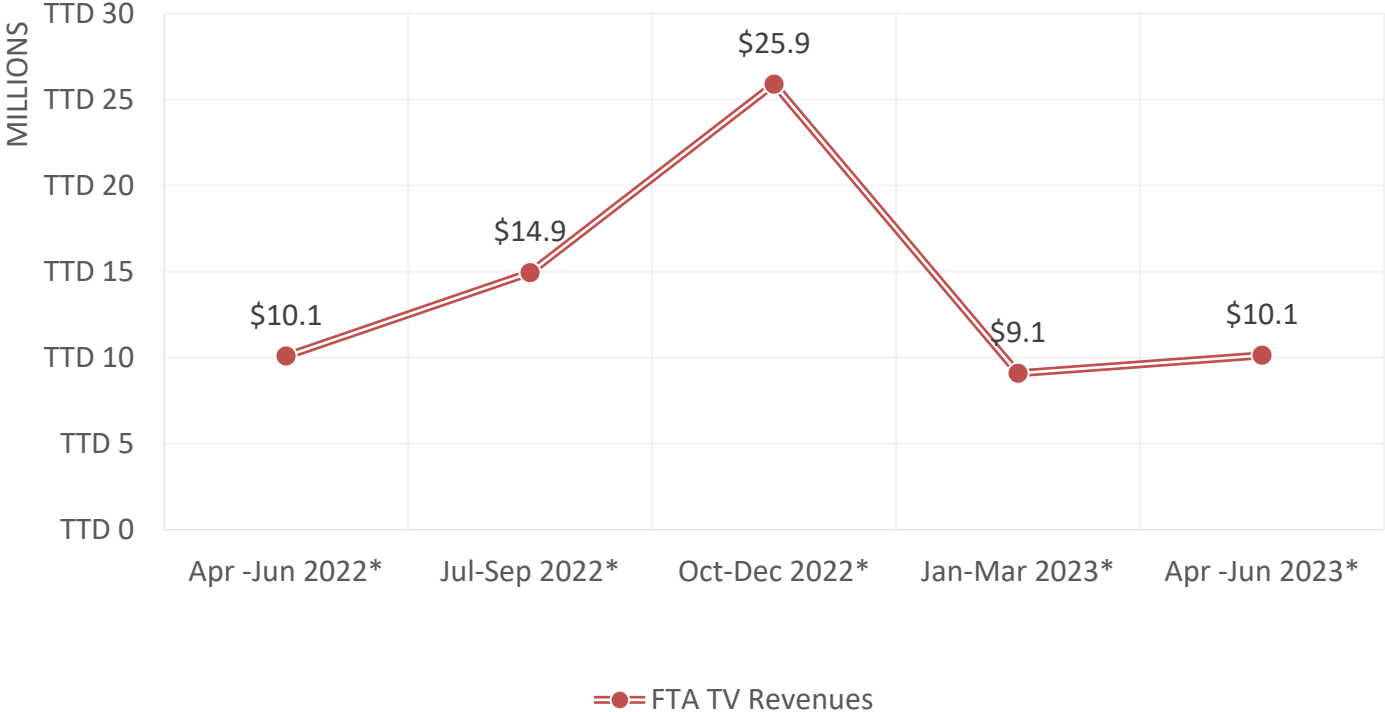
0%



Q-o-Q PERCENT CHANGE

11.0%

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q2 2022 TO Q2 2023



- *Data estimated for the following concessionaire who had not submitted data at the date of publication: Q2 2022 – Q2 2023: Advanced Community Network*

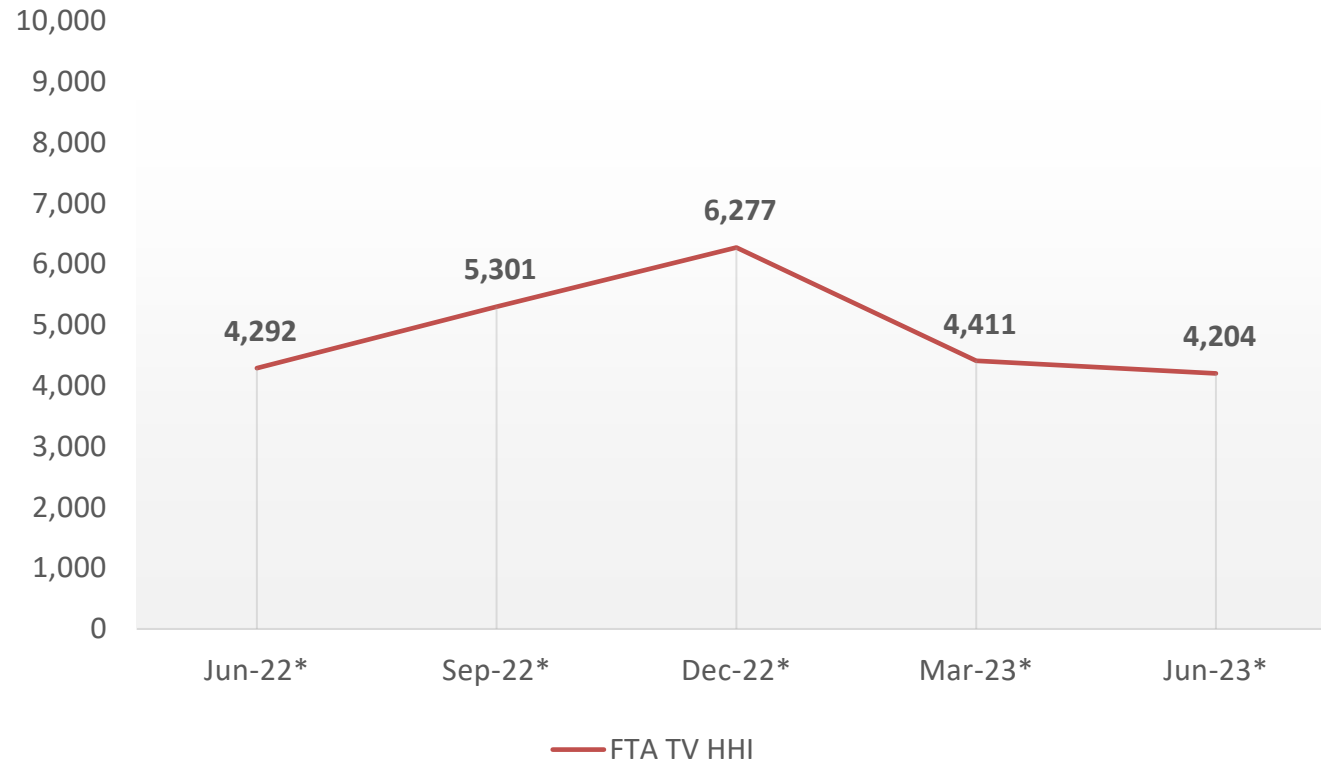
Free-to-Air TV HHI

HHI
4,204

Y-o-Y
PERCENT
CHANGE
-2.1%

Q-o-Q
PERCENT
CHANGE
-4.7%

HHI for Free to Air TV Services
Q2 2022 to Q2 2023

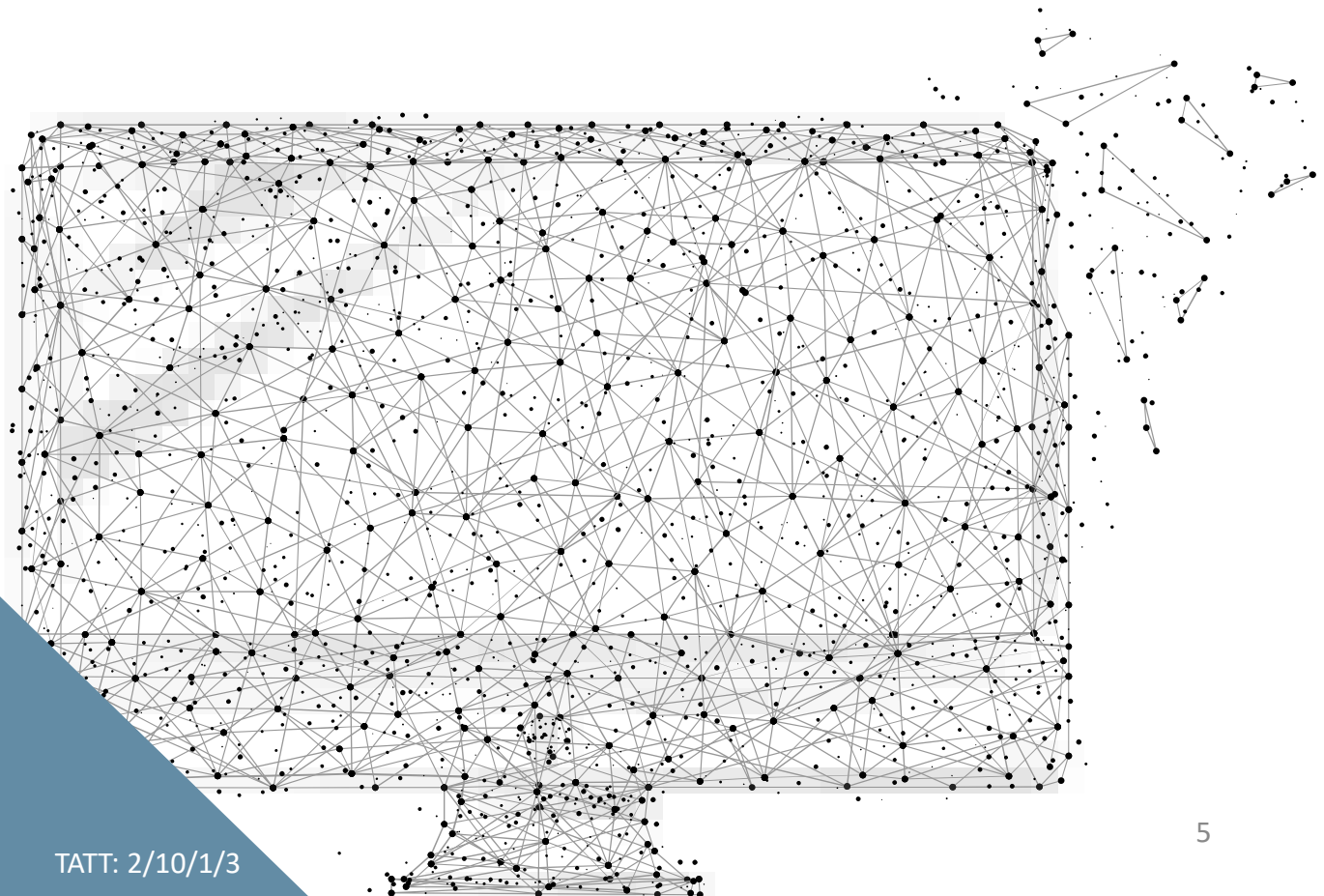


- *Data estimated for the following concessionaire who had not submitted data at the date of publication:
Q2 2022 – Q2 2023: Advanced Community Network*

Broadcasting Service via Cable TV

19/09/2023

TATT: 2/10/1/3



Broadcasting Service via Cable TV Revenues



GROSS REVENUES

\$1.3m



Y-o-Y PERCENT CHANGE

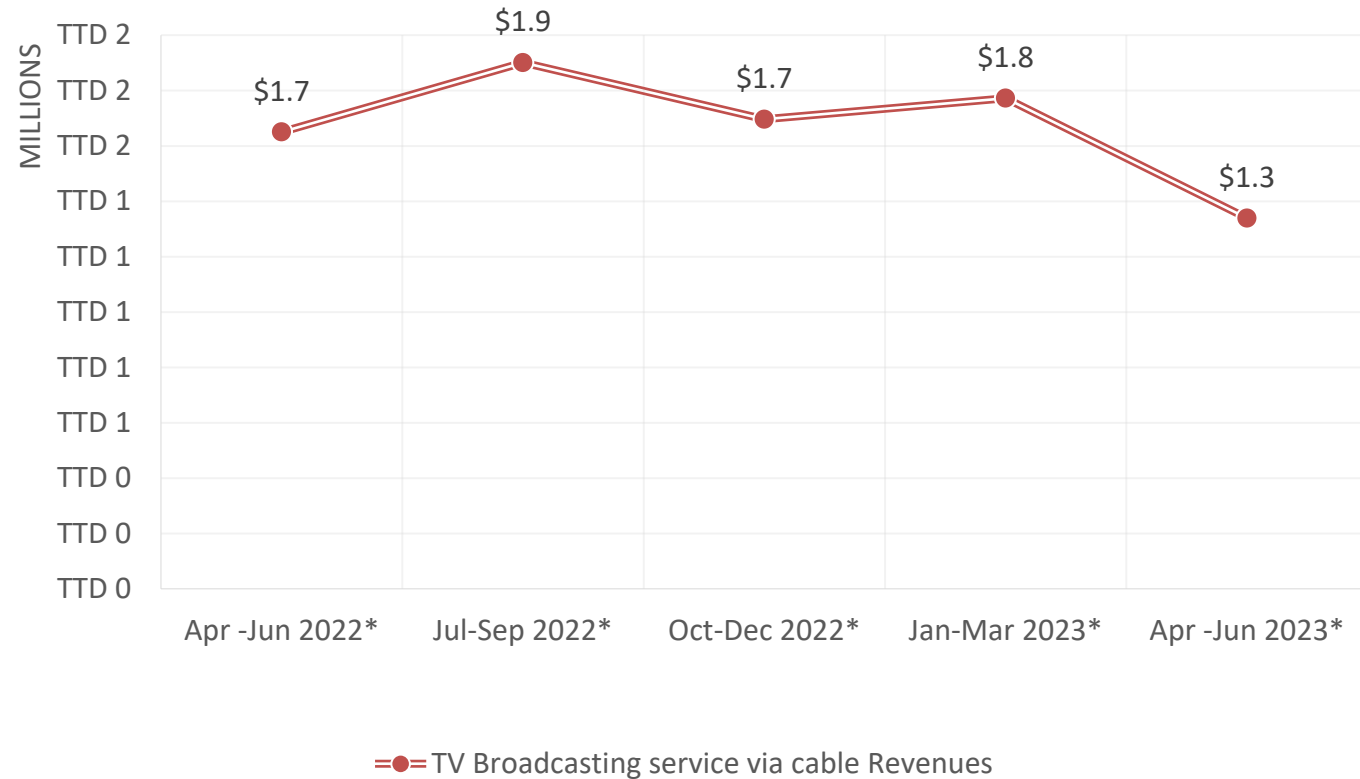
-23.5%



Q-o-Q PERCENT CHANGE

-27.8%

GROSS REVENUES BROADCASTING SERVICE VIA CABLE FROM Q2 2022 TO Q2 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q2 2022 – Q2 2023: WI Sports*

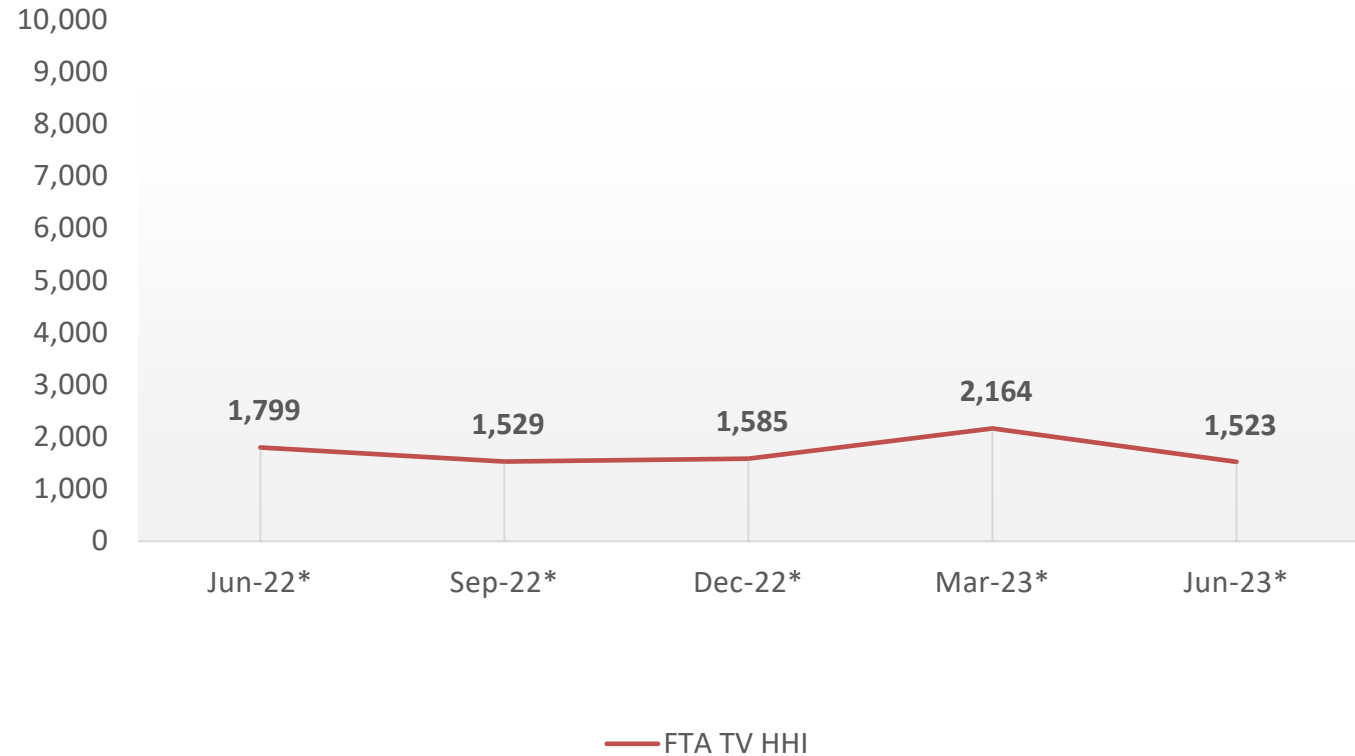
Broadcasting Service via Cable TV Revenues

HHI
2,328

Y-o-Y
PERCENT
CHANGE
-15.3%

Q-o-Q
PERCENT
CHANGE
-29.6%

HHI for Broadcasting Service via Cable
Q2 2022 to Q2 2023



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q2 2022 – Q2 2023: WI Sports*

QUARTERLY MARKET UPDATE

April to June 2023

