

# QUARTERLY MARKET UPDATE

April to June 2025



## Quarterly Market Update – Q2 2025

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TATT: 2/10/1/3

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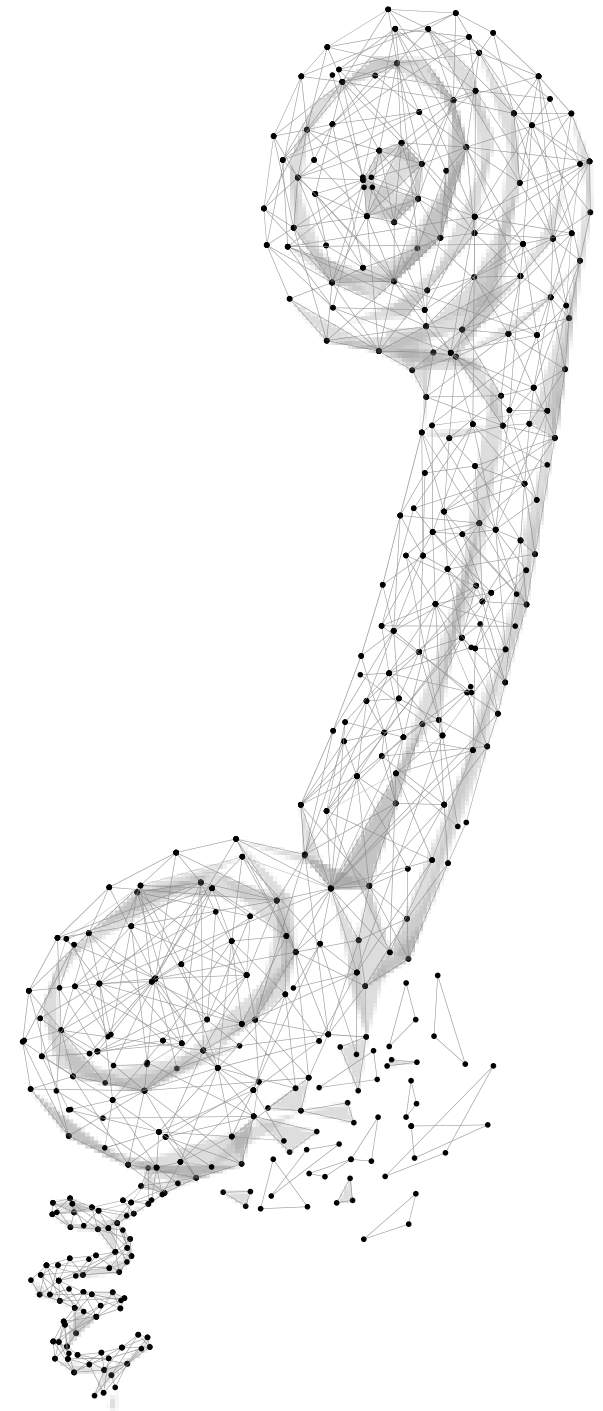
# Notes

- 1. The number of mobile voice subscriptions has been adjusted downward due to revised figures submitted by a concessionaire.**
- 2. Fixed Broadband subscriptions have been amended for Q1 2024 to Q3 2024 based on revisions submitted by concessionaires.**
- 3. Penetration rates have been calculated using the Central Statistical Office figures as follows:**
  - a) 1,368,333 - 2024 Mid-year population estimate**
  - b) Number of households - 401,382 (Trinidad and Tobago 2011 Population and Housing Census Demographic Report, Central Statistical Office)**
- 4. Average Revenue Per User (ARPU) is calculated for each quarter using total quarterly revenues divided by subscriptions.**

# Fixed Voice

9/19/2025

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# Fixed Voice Subscriptions



**TOTAL NUMBER OF  
SUBSCRIPTIONS**

**293,000**



**Y-o-Y  
PERCENT  
CHANGE**

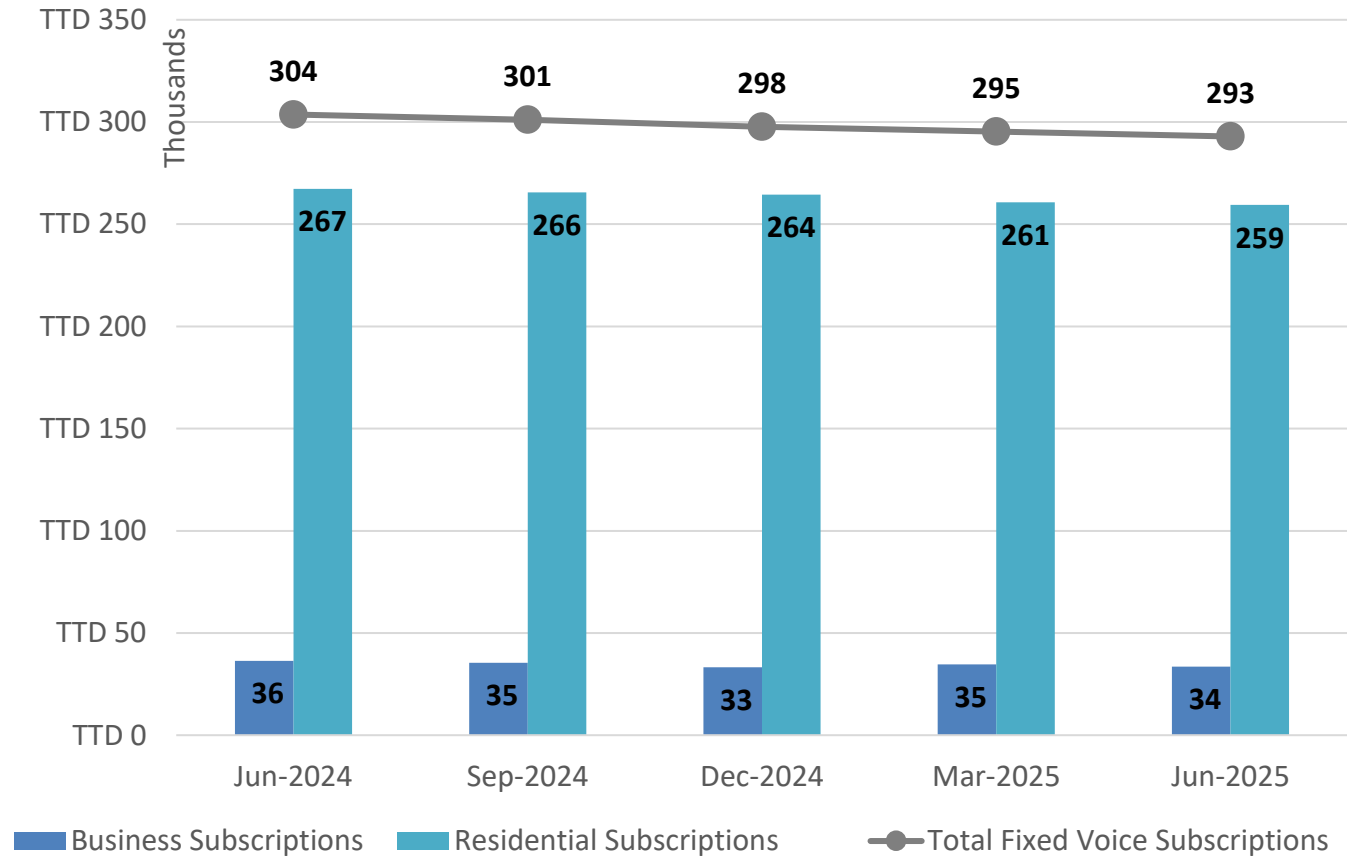
**-3.6%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.7%**

Number of Fixed Line Subscriptions  
Q2 2024 to Q2 2025



# Fixed Voice Penetration



**FIXED VOICE  
PENETRATION PER  
100 INHABITANTS**

**21.4**



**Y-o-Y  
PERCENT  
CHANGE**

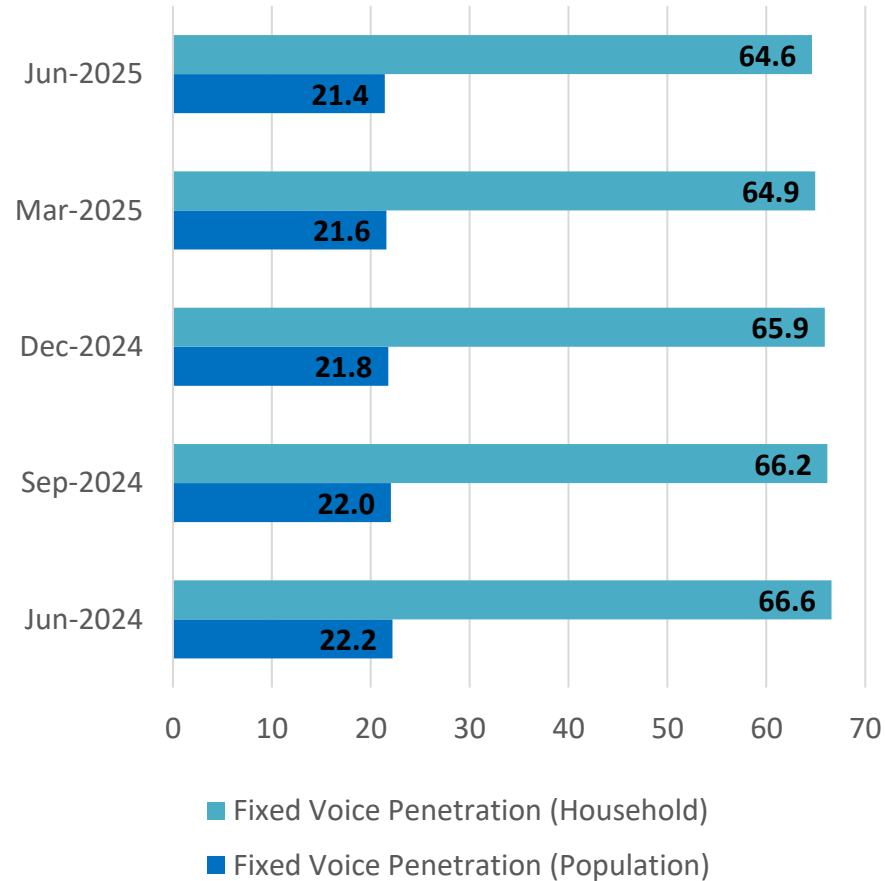
**-3.6%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.9%**

Penetration Rate of Fixed Line Subscriptions  
from Q2 2024 to Q2 2025



**FIXED LINE  
PENETRATION PER  
100 HOUSEHOLDS**

**64.6**



**Y-o-Y  
PERCENT  
CHANGE**

**-3.0%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.5%**

# Fixed Voice Revenues



**GROSS  
REVENUES**

**\$67.6m**



**Y-o-Y  
PERCENT  
CHANGE**

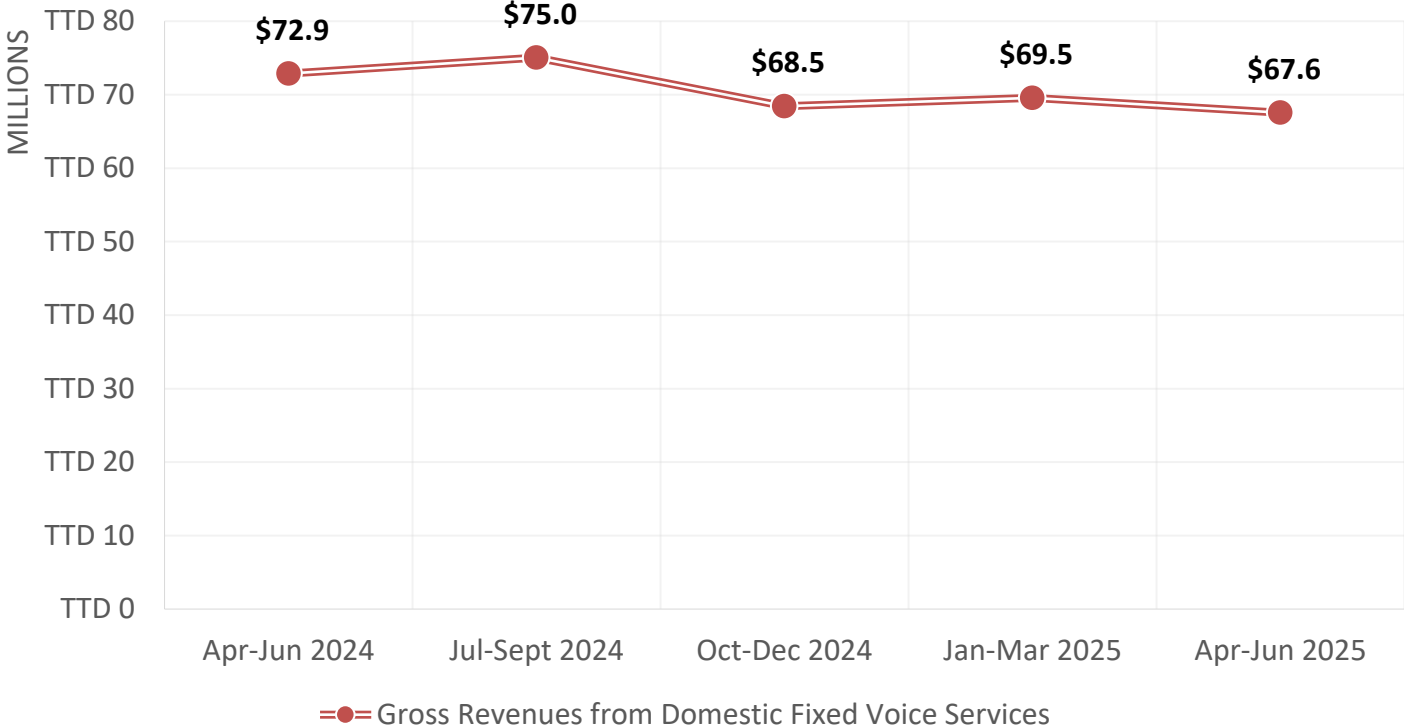
**-7.3%**



**Q-o-Q  
PERCENT  
CHANGE**

**-2.7%**

**GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES  
FROM Q2 2024 TO Q2 2025**



# Fixed Voice Average Revenue Per User



ARPU  
**\$231**

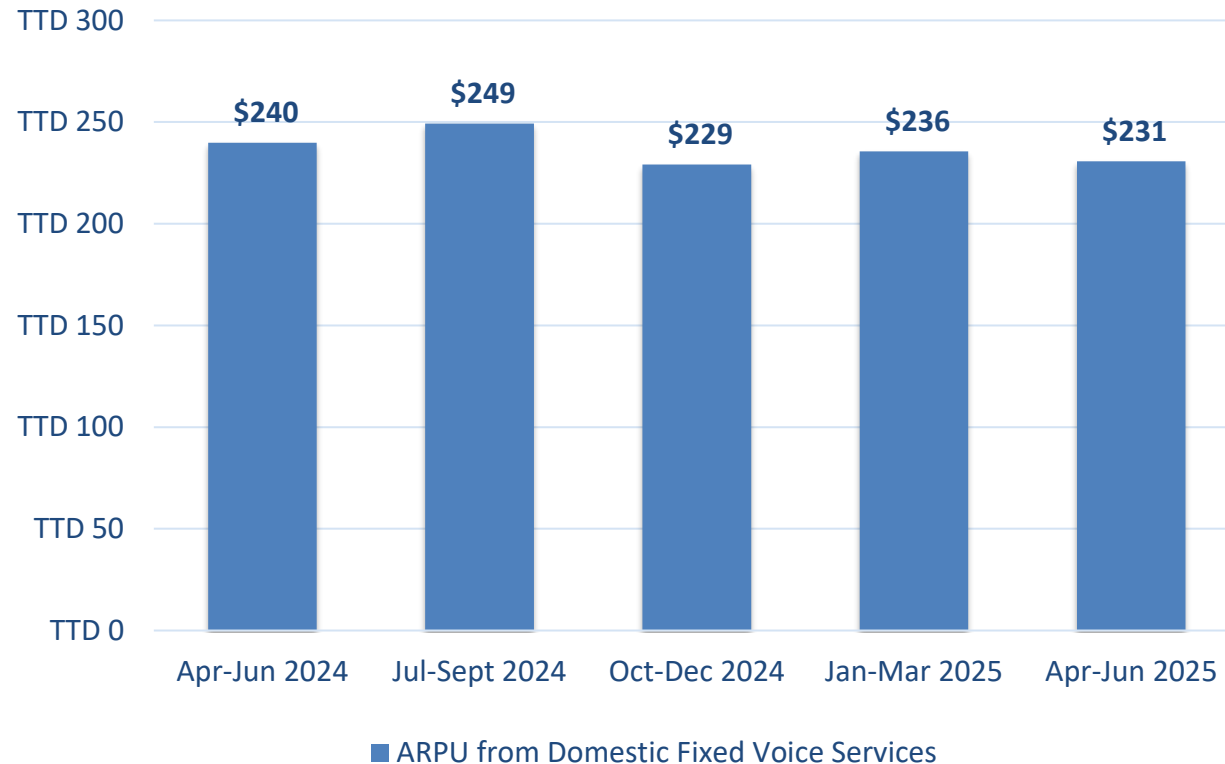


Y-o-Y  
PERCENT  
CHANGE  
**-3.8%**



Q-o-Q  
PERCENT  
CHANGE  
**-2.1%**

ARPU from Domestic Fixed Voice Services  
from Q2 2024 to Q2 2025



# Fixed Voice HHI



HHI

3,192



Y-o-Y  
PERCENT  
CHANGE

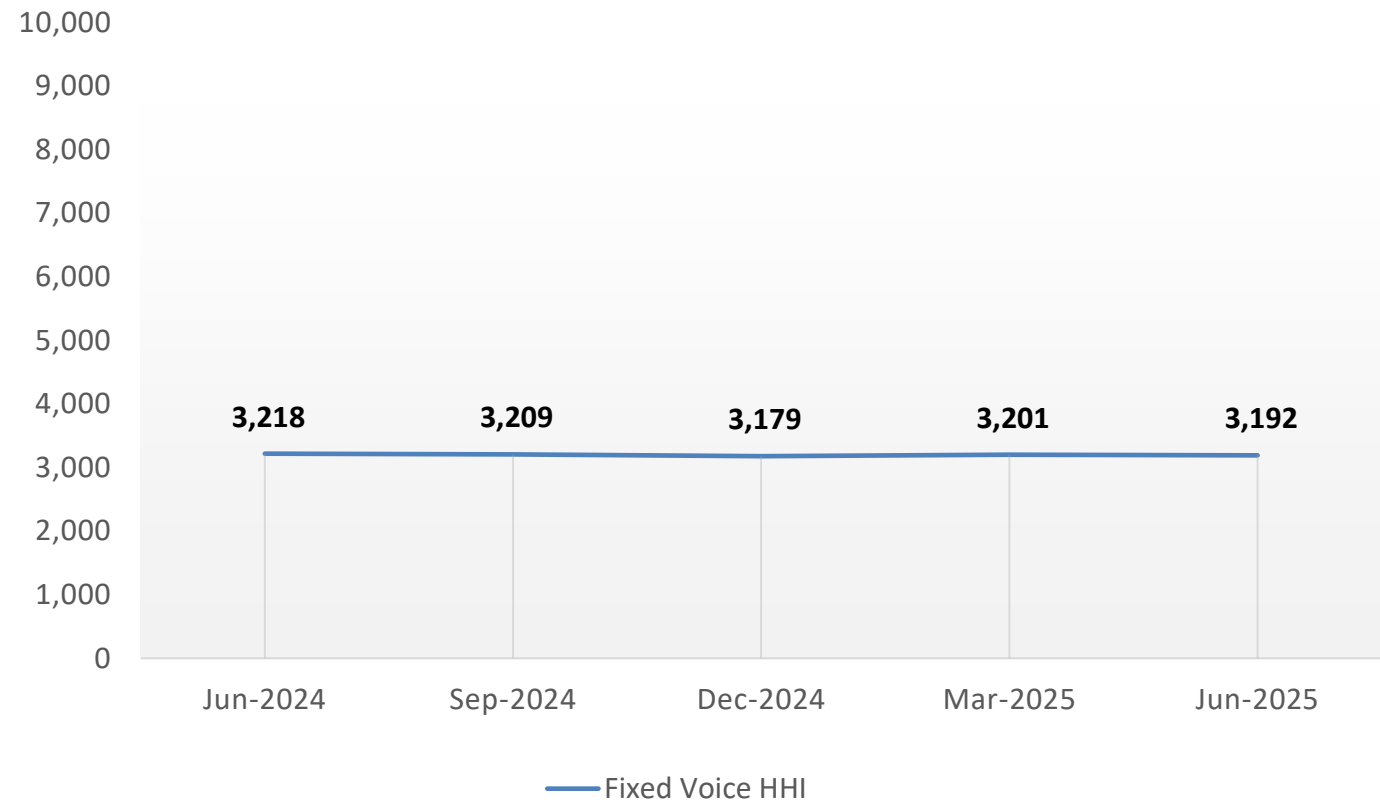
-0.8%



Q-o-Q  
PERCENT  
CHANGE

-0.3%

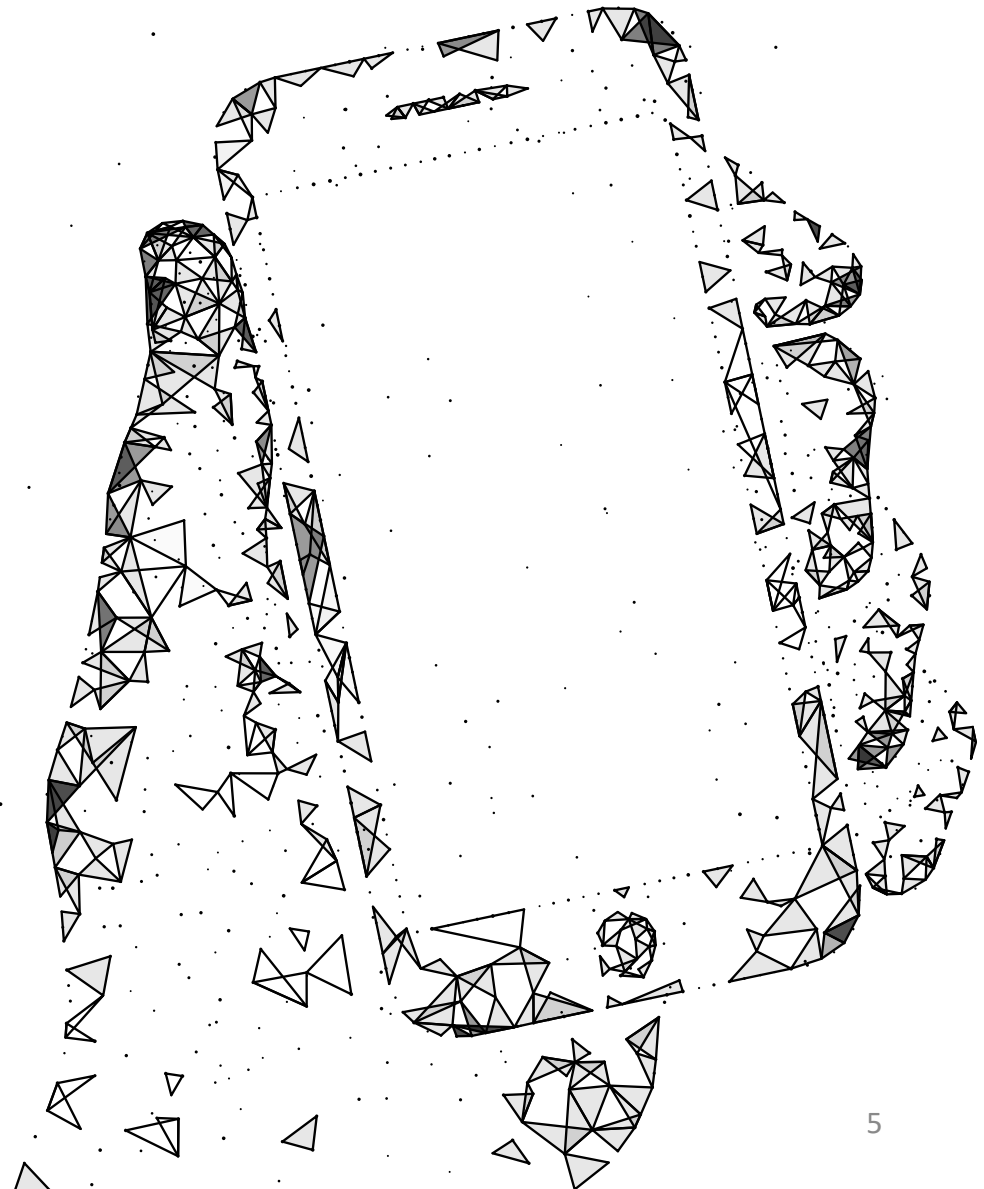
HHI for Domestic Fixed Line  
from Q2 2024 to Q2 2025



# Mobile Voice

9/19/2025

TATT: 2/10/1/3



# Mobile Voice Subscriptions



TOTAL NUMBER OF  
SUBSCRIPTIONS

1,719,000



Y-o-Y  
PERCENT  
CHANGE

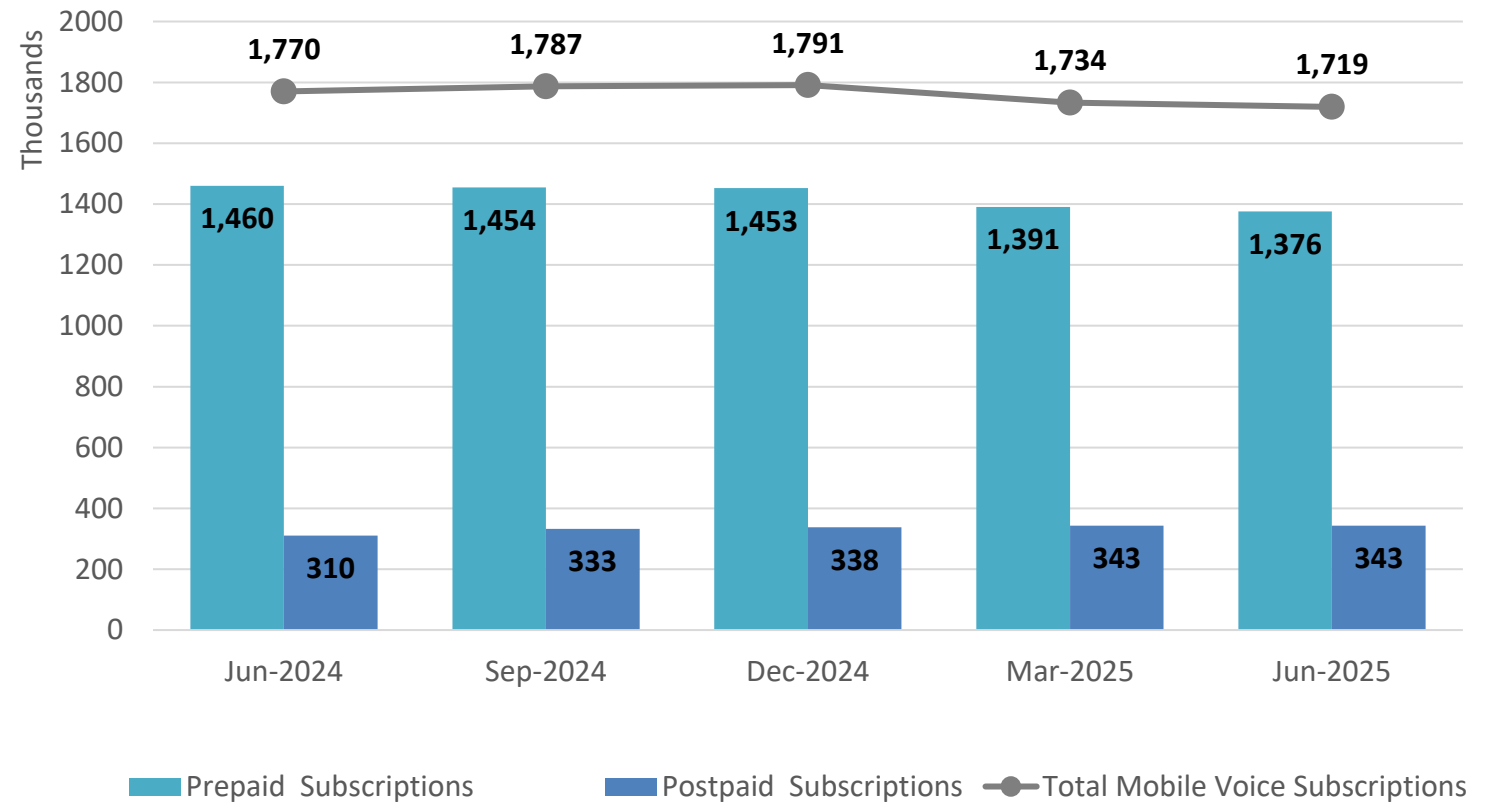
-2.9%



Q-o-Q  
PERCENT  
CHANGE

-0.9%

Number of Mobile Voice Subscriptions  
from Q2 2024 to Q2 2025



# Mobile Voice Penetration



**MOBILE VOICE  
PENETRATION  
PER 100  
INHABITANTS**

**125.7**



**Y-o-Y  
PERCENT  
CHANGE**

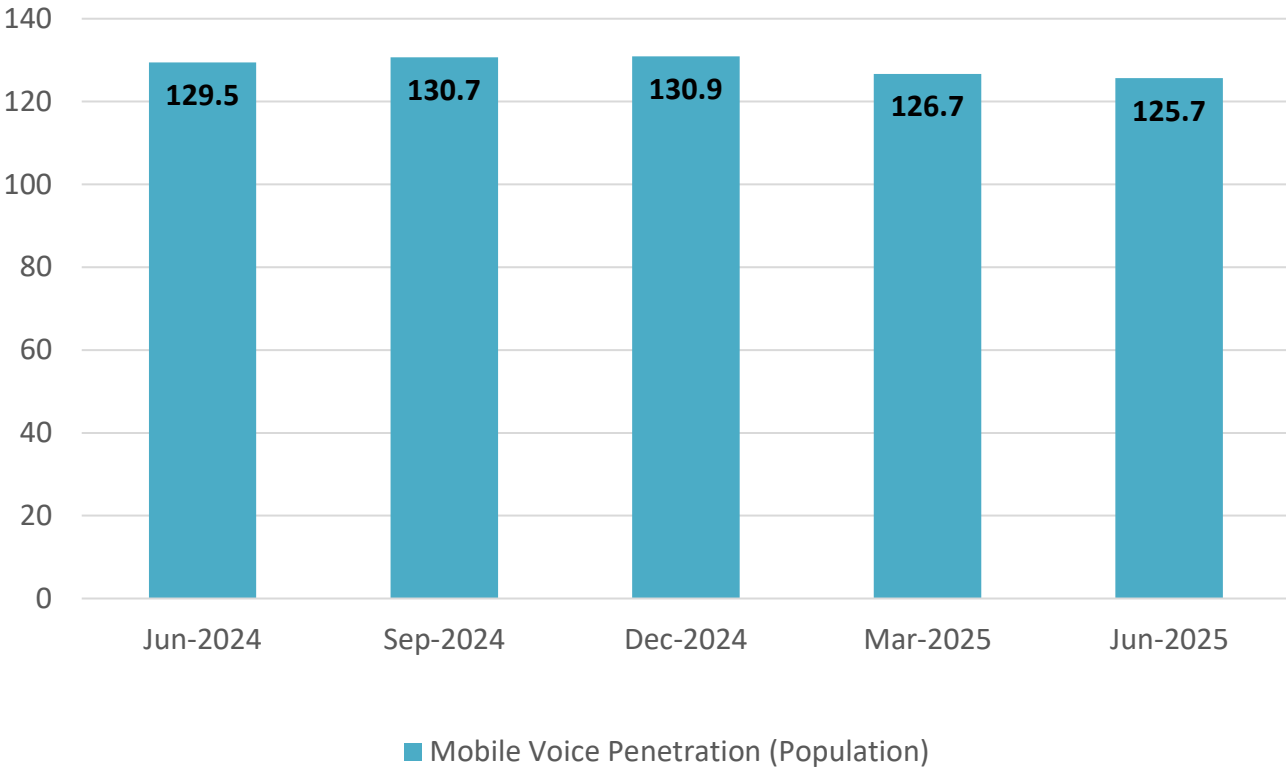
**-2.9%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.8%**

Penetration of Mobile Voice Subscriptions  
from Q2 2024 to Q2 2025



# Mobile Voice Revenues



**GROSS  
REVENUES**

**\$ 178.1m**



**Y-o-Y  
PERCENT  
CHANGE**

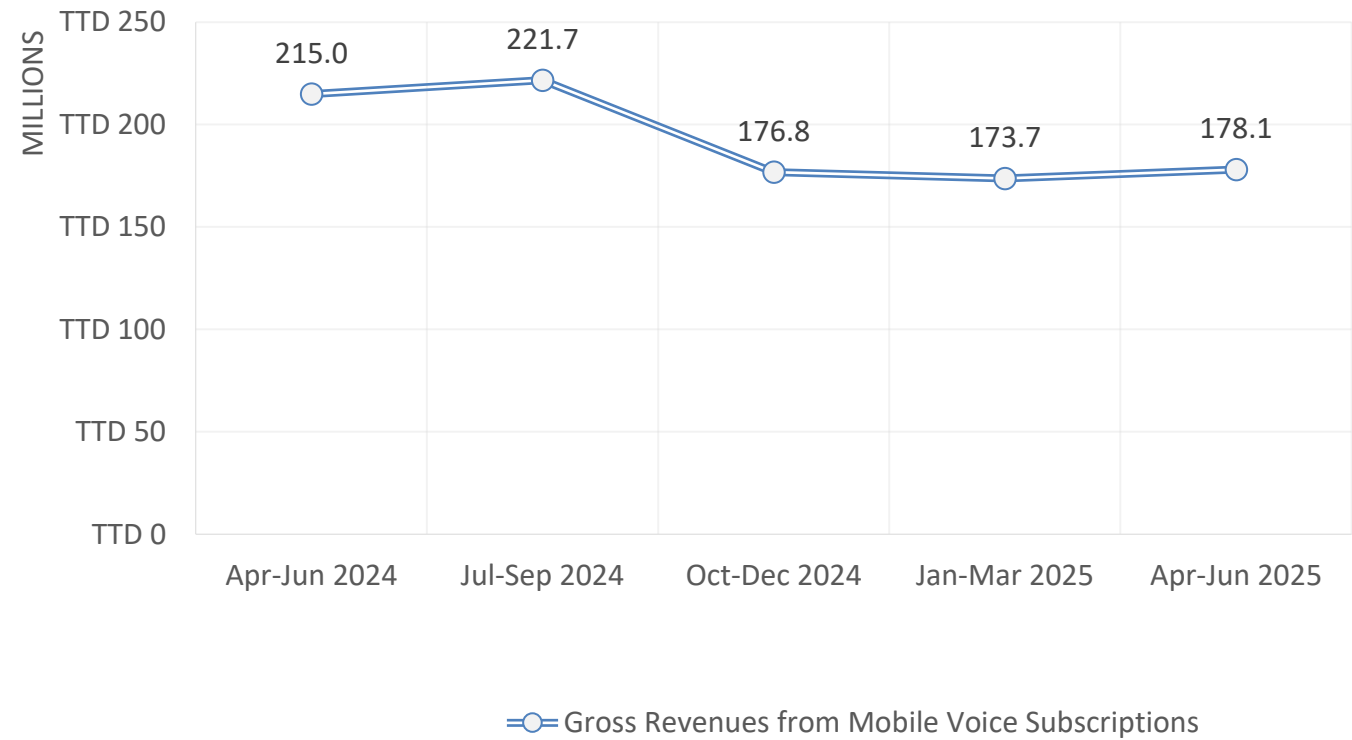
**-17.2%**



**Q-o-Q  
PERCENT  
CHANGE**

**2.5%**

**REVENUES FROM MOBILE VOICE SERVICES  
FROM Q2 2024 TO Q2 2025**



# Average Revenue Per User

## Mobile Voice Services



ARPU  
**\$103.3**



Y-o-Y  
PERCENT  
CHANGE

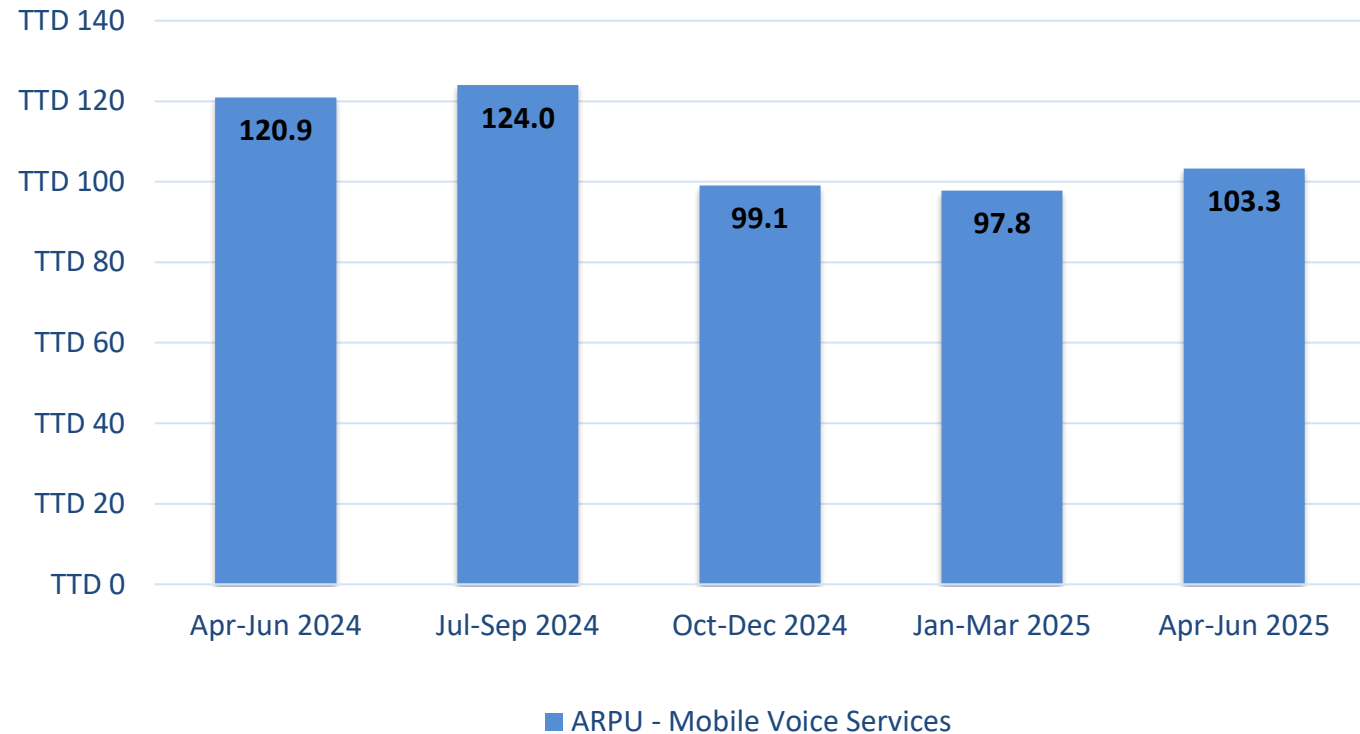
**-17.6%**



Q-o-Q  
PERCENT  
CHANGE

**5.6%**

ARPU for Mobile Voice Services  
from Q2 2024 to Q2 2025



# Mobile Voice HHI



HHI

5,009



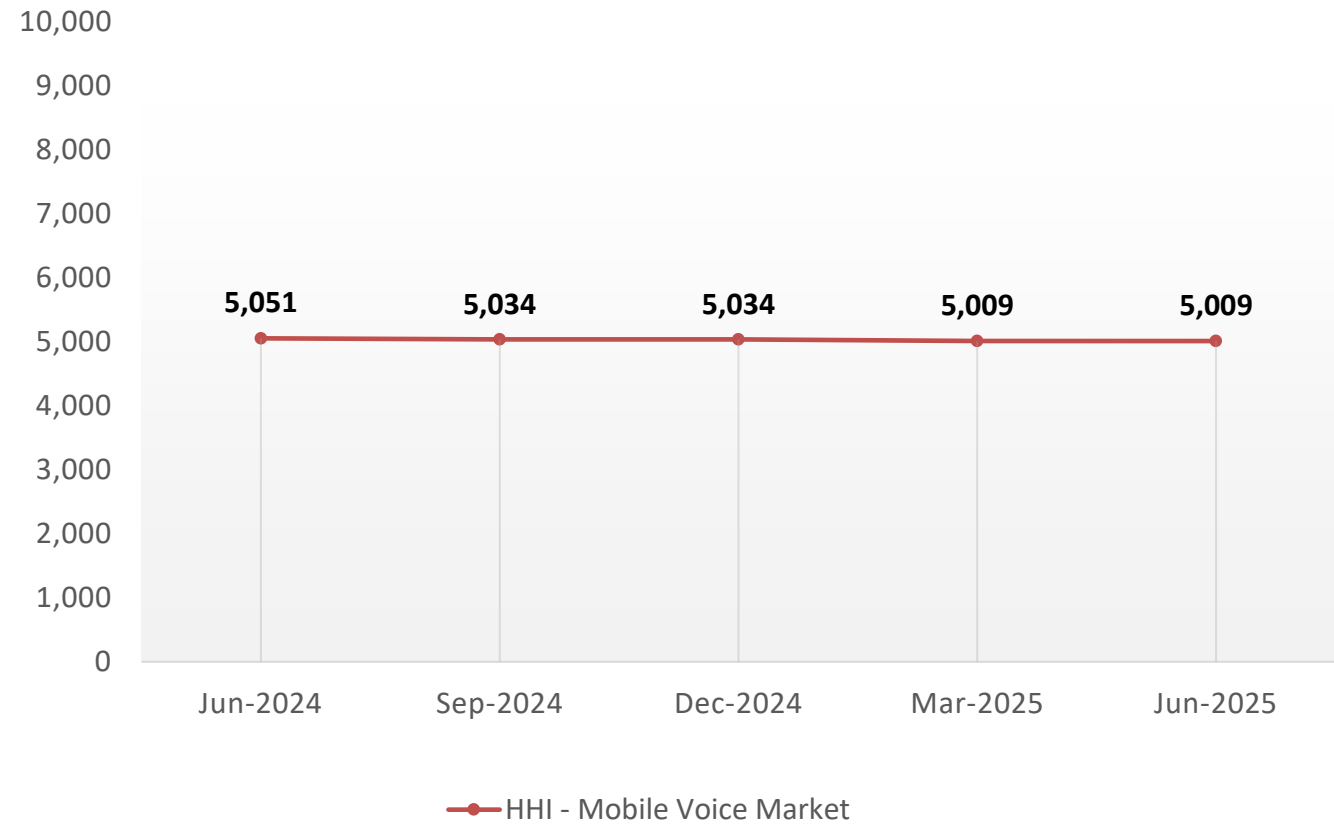
Y-o-Y  
PERCENT  
CHANGE

-0.8%

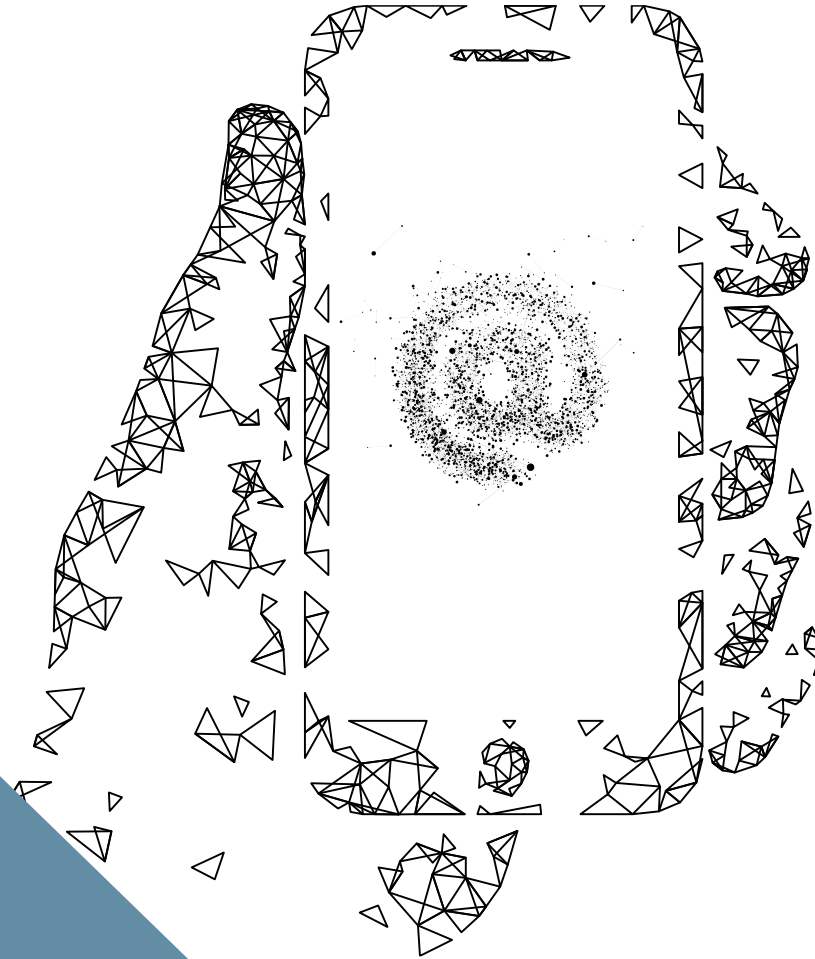
Q-o-Q  
PERCENT  
CHANGE

0%

HHI for Domestic Mobile Services  
from Q2 2024 to Q2 2025



# Mobile Internet



# Mobile Internet Subscriptions



TOTAL NUMBER OF  
SUBSCRIPTIONS

811,000



Y-o-Y  
PERCENT  
CHANGE

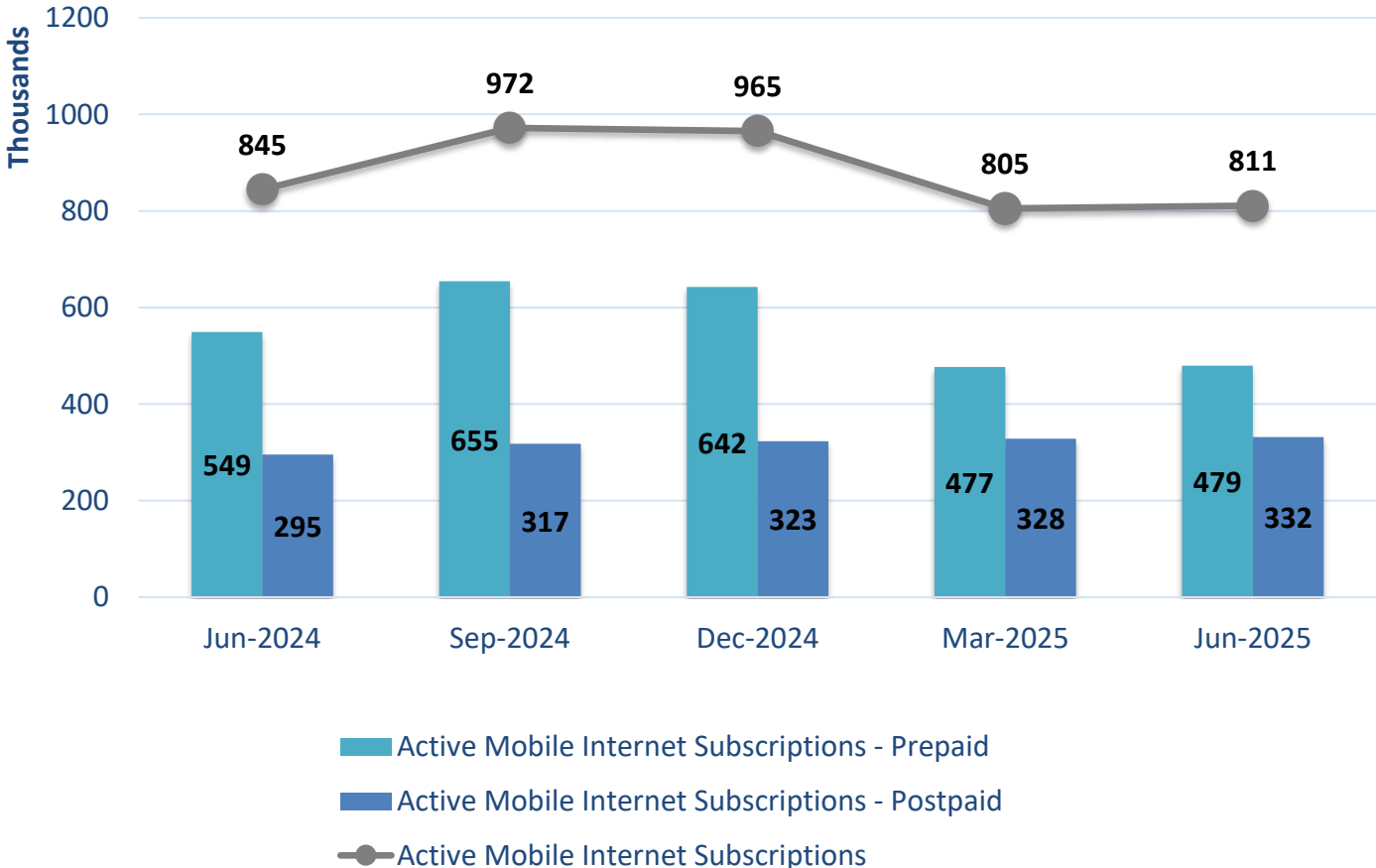
-4.0%



Q-o-Q  
PERCENT  
CHANGE

0.7%

Number of Mobile Internet Subscriptions  
from Q2 2024 to Q2 2025



# Mobile Internet Penetration



**MOBILE  
INTERNET  
PENETRATION  
PER 100  
INHABITANTS**

**59.3**



**Y-o-Y  
PERCENT  
CHANGE**

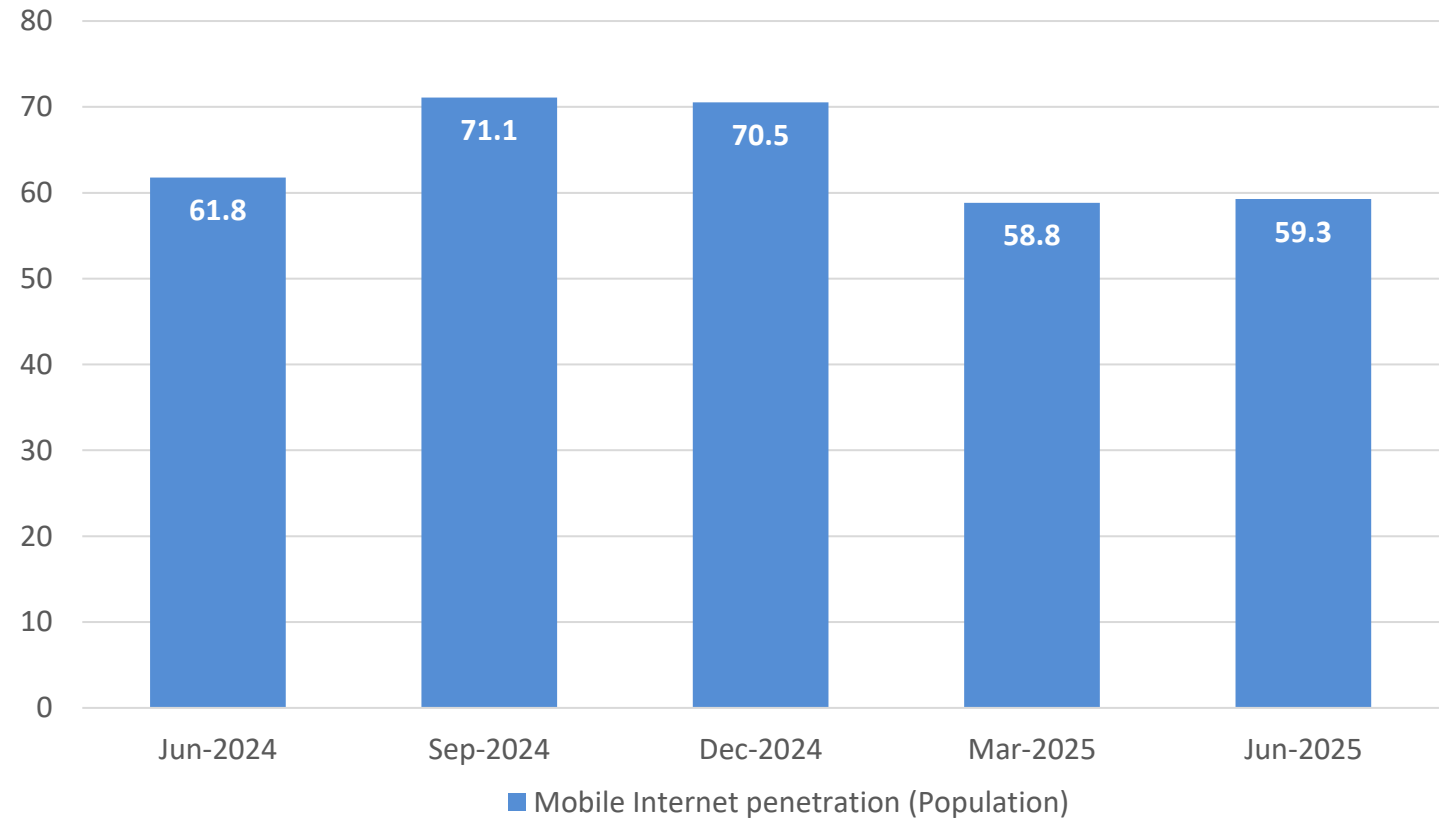
**-2.5%**



**Q-o-Q  
PERCENT  
CHANGE**

**0.9%**

Penetration for Mobile Internet Subscriptions  
from Q2 2024 to Q2 2025



# Mobile Internet Revenues



**GROSS  
REVENUES**

**\$ 323.9m**



**Y-o-Y  
PERCENT  
CHANGE**

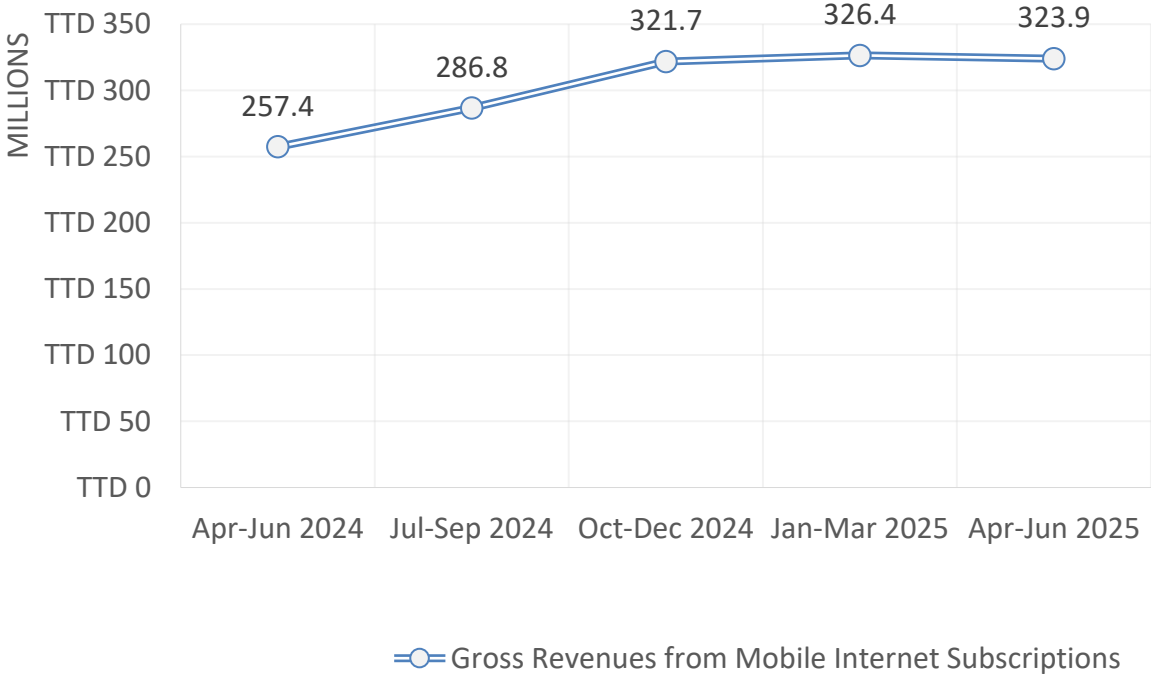
**25.8%**



**Q-o-Q  
PERCENT  
CHANGE**

**-0.8%**

**REVENUES FROM MOBILE INTERNET SERVICES  
FROM Q2 2024 TO Q2 2025**



# Average Revenue Per User

## Mobile Internet Services



ARPU  
**\$402.7**



Y-o-Y  
PERCENT  
CHANGE

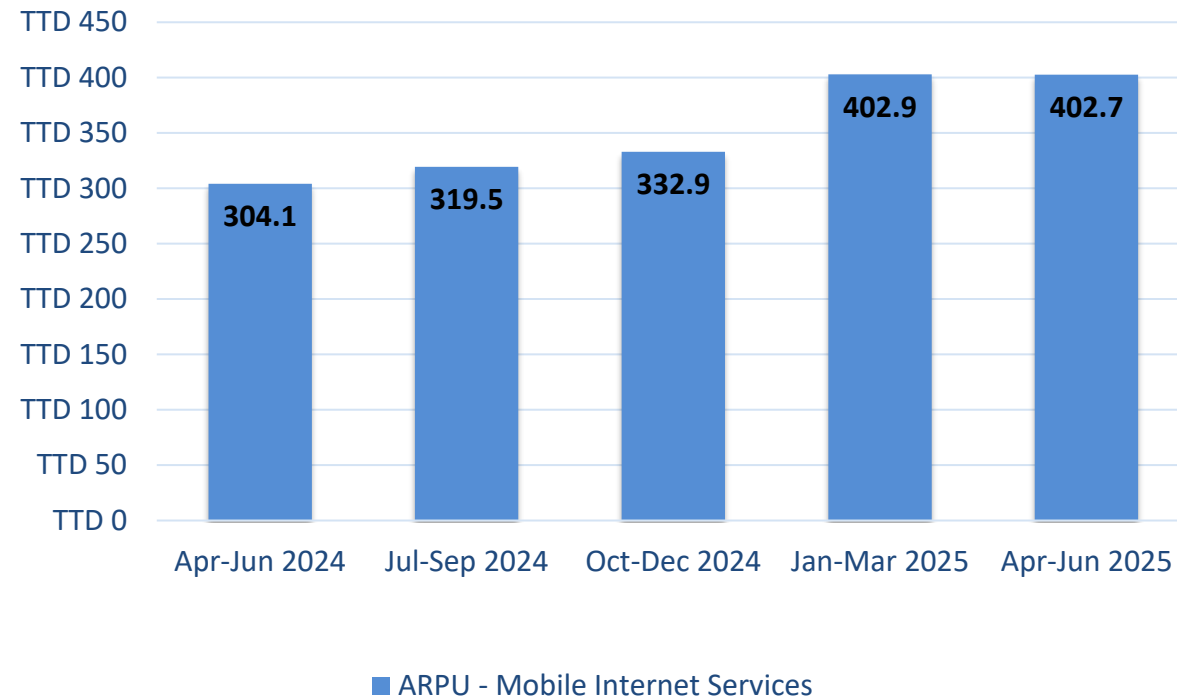
**32.4%**



Q-o-Q  
PERCENT  
CHANGE

**-0.1%**

ARPU for Mobile Internet Services  
from Q2 2024 to Q2 2025



# Mobile Internet HHI



HHI

5,358



Y-o-Y  
PERCENT  
CHANGE

-5.4%



Q-o-Q  
PERCENT  
CHANGE

0.4%

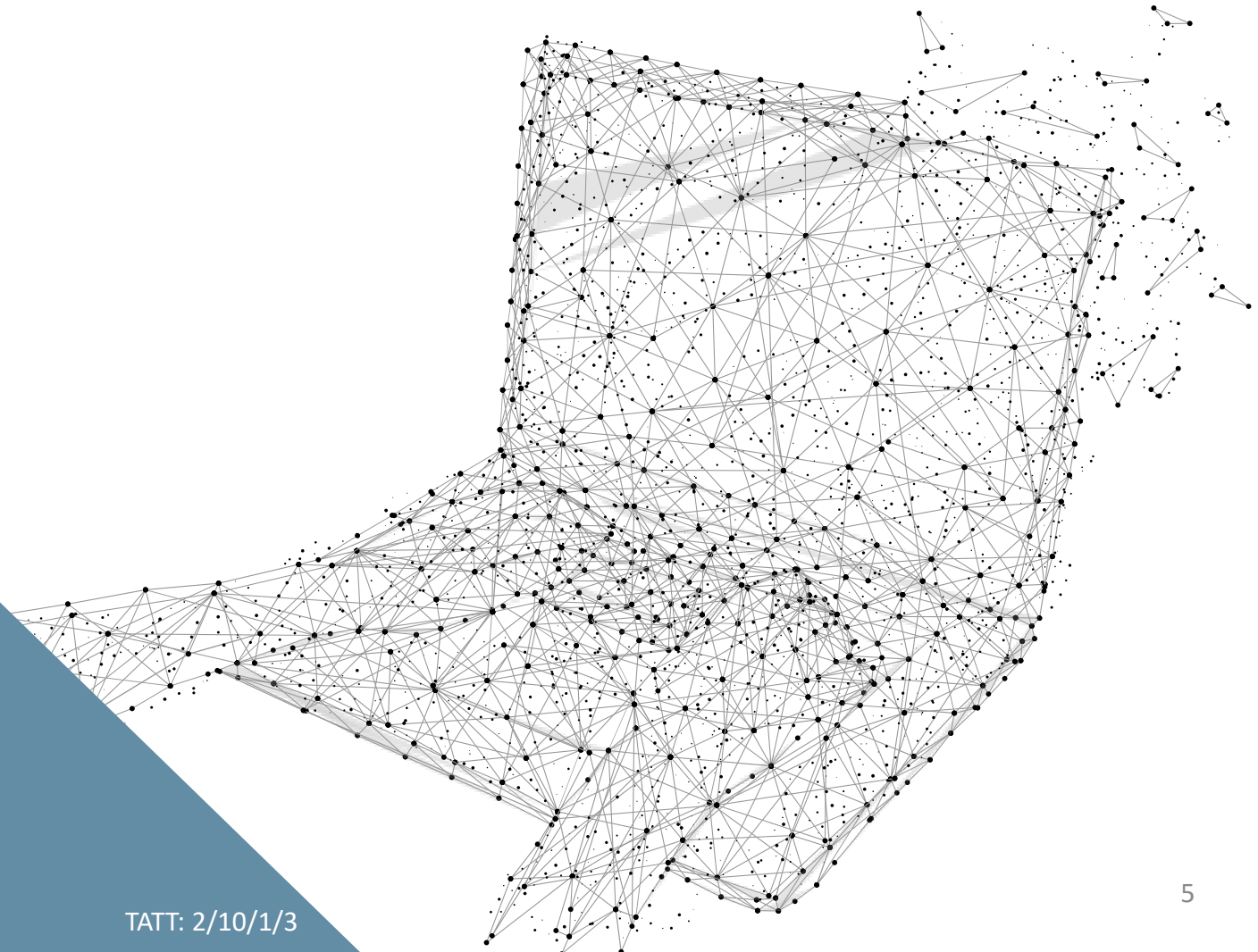
HHI for Mobile Internet Services  
from Q2 2024 to Q2 2025



# Fixed Internet

9/19/2025

TATT: 2/10/1/3



# Fixed Broadband Subscriptions



TOTAL NUMBER OF  
SUBSCRIPTIONS

419,800



Y-o-Y  
PERCENT  
CHANGE

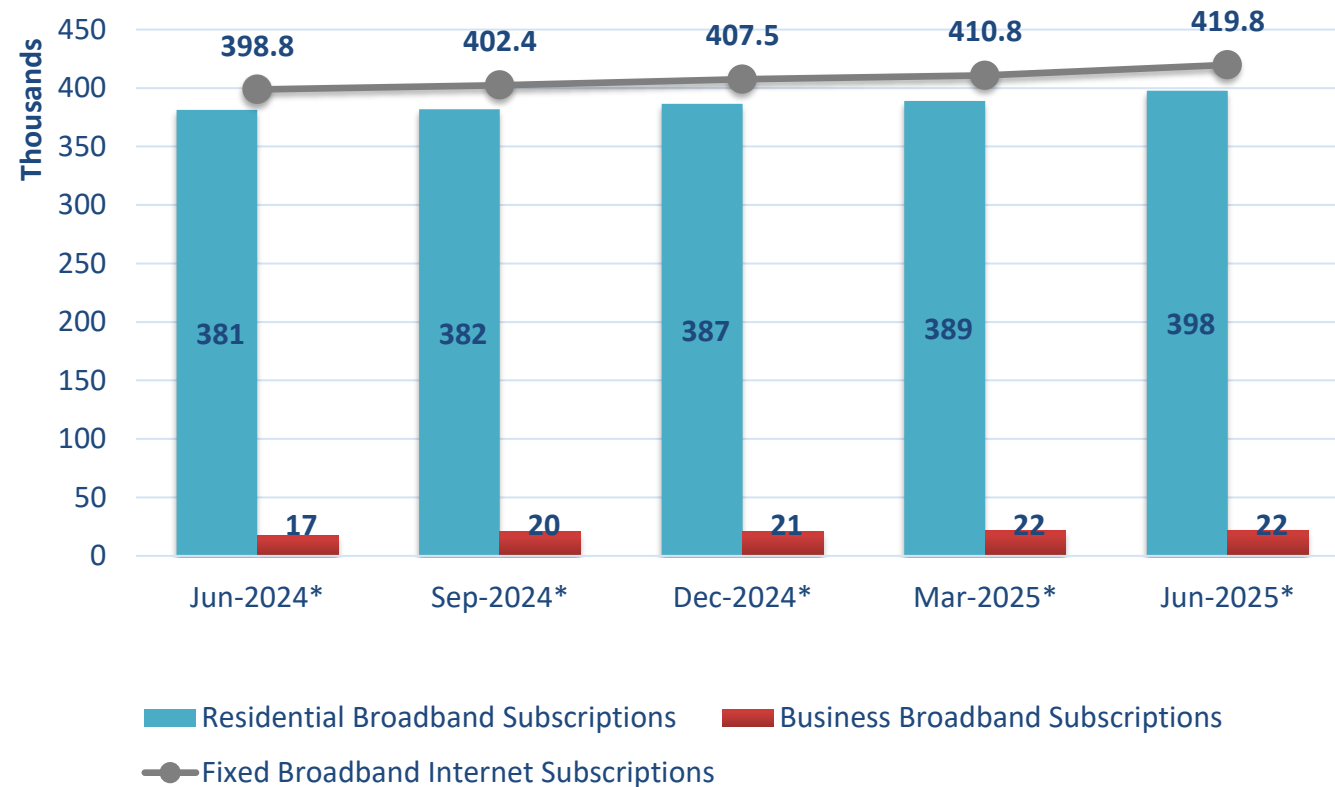
5.3%



Q-o-Q  
PERCENT  
CHANGE

2.2%

Number of Fixed Broadband Internet Subscriptions  
from Q2 2024 to Q2 2025



\* Data estimated for the following concessionaire who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited

# Fixed Internet Penetration



**FIXED INTERNET  
PENETRATION  
PER 100  
INHABITANTS**

**30.7**



**Y-o-Y  
PERCENT  
CHANGE**

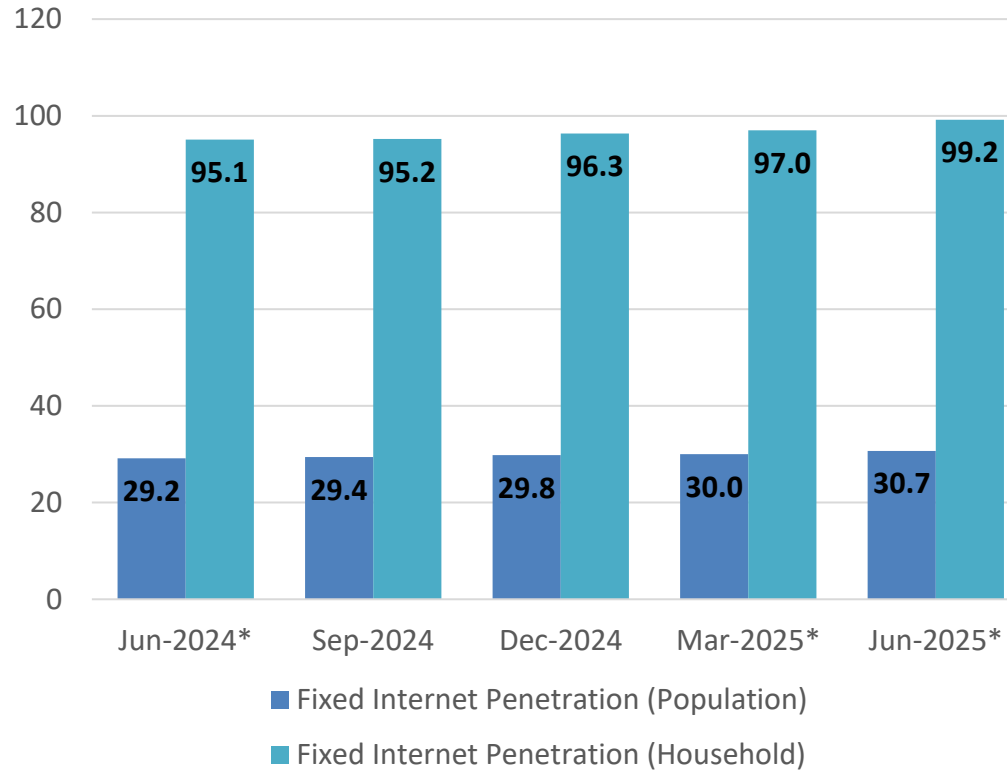
**5.1%**



**Q-o-Q  
PERCENT  
CHANGE**

**2.3%**

Penetration for Fixed Internet Subscriptions  
from Q2 2024 to Q2 2025



**FIXED INTERNET  
PENETRATION  
PER 100  
HOUSEHOLDS**

**99.2**



**Y-o-Y  
PERCENT  
CHANGE**

**4.3%**



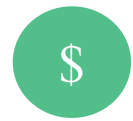
**Q-o-Q  
PERCENT  
CHANGE**

**2.3%**

*Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

*Fixed Internet penetration is calculated as the number of residential subscriptions divided by the number of households x 100*

# Fixed Internet Revenues



GROSS  
REVENUES

**\$ 353.9m**



Y-o-Y  
PERCENT  
CHANGE

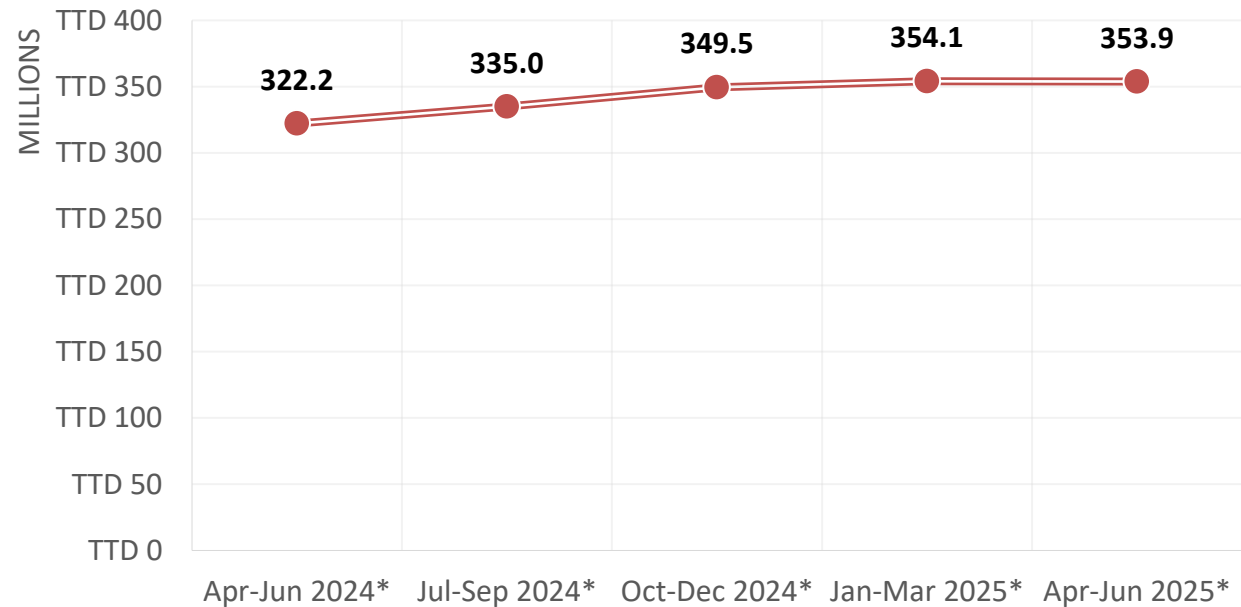
**9.8%**



Q-o-Q  
PERCENT  
CHANGE

**-0.1%**

GROSS REVENUES FROM FIXED INTERNET SERVICES  
FROM Q2 2024 TO Q2 2025



● Gross Revenues from Fixed Internet Services

*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Fixed Internet Average Revenue Per User



ARPU  
**\$844**

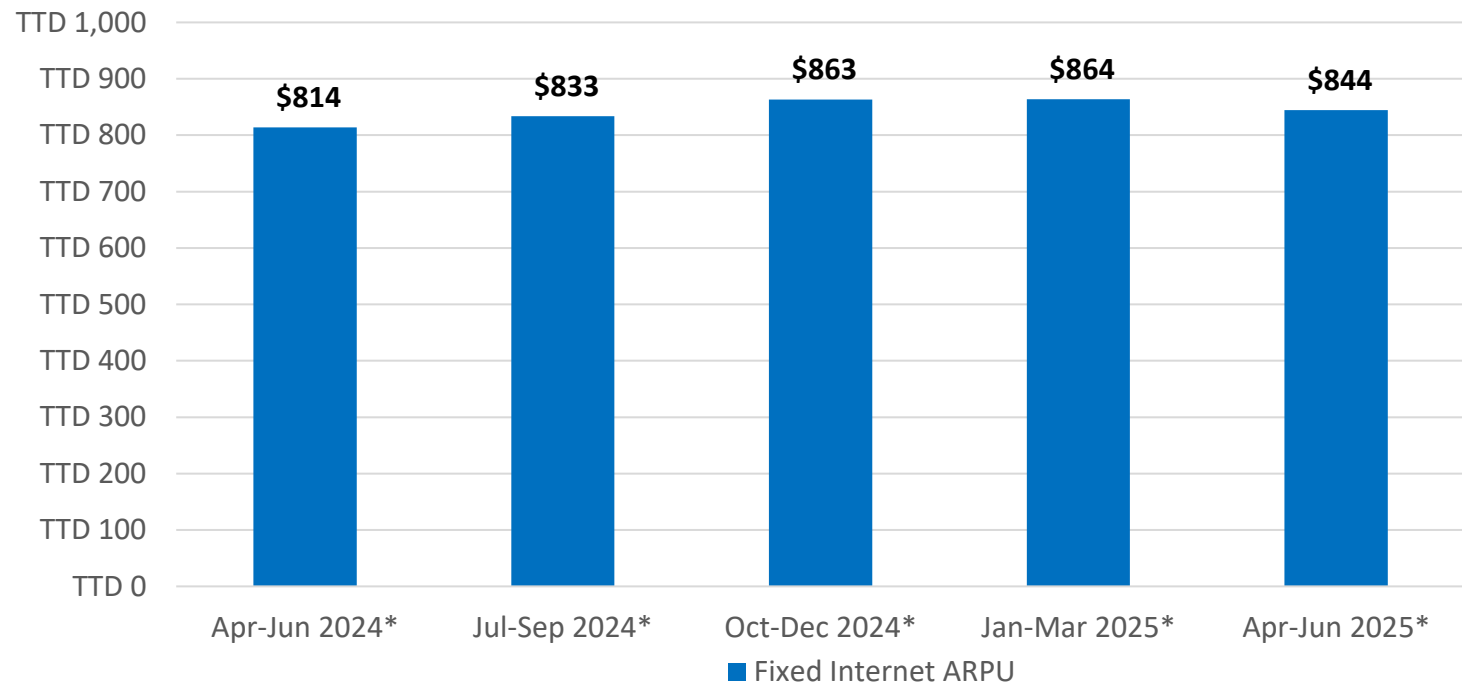


Y-o-Y  
PERCENT  
CHANGE  
**3.7%**



Q-o-Q  
PERCENT  
CHANGE  
**-2.3%**

ARPU for Fixed Internet Services  
from Q2 2024 to Q2 2025



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Fixed Internet HHI



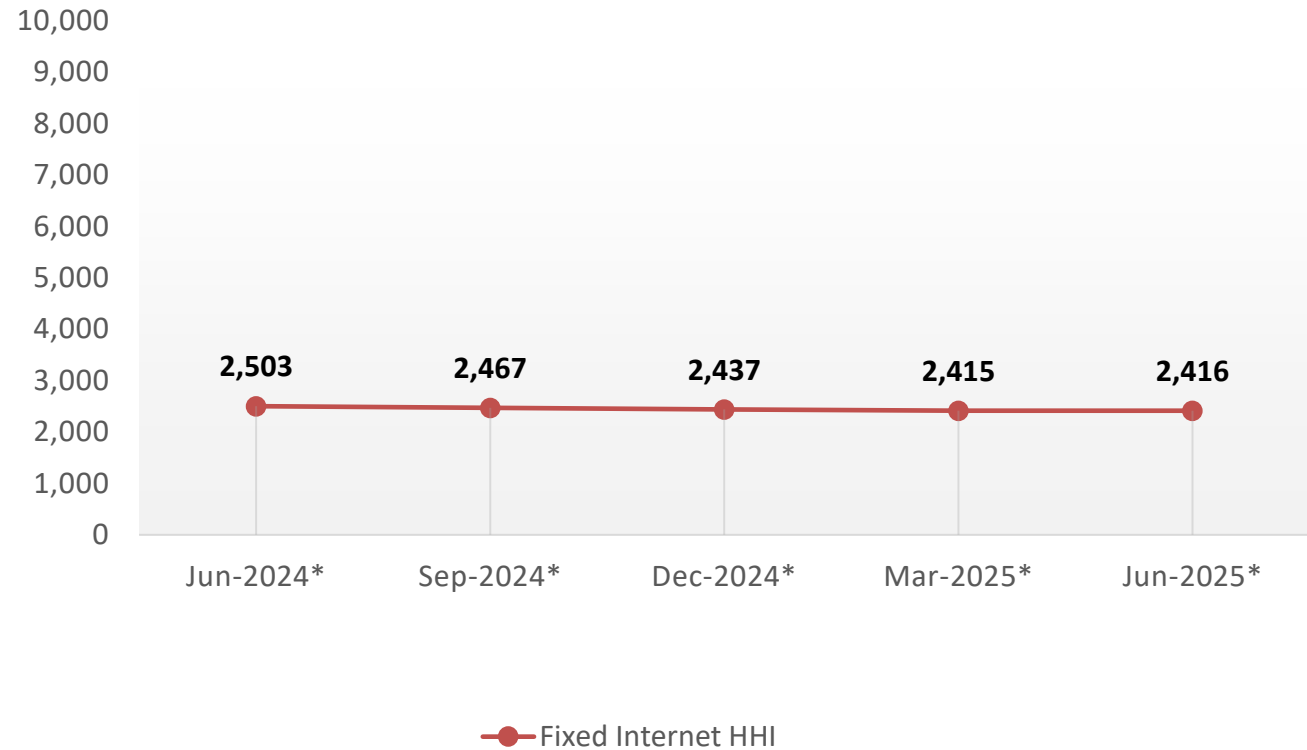
HHI  
**2,416**



Y-o-Y  
PERCENT  
CHANGE  
**-3.5%**

Q-o-Q  
PERCENT  
CHANGE  
**0%**

HHI for Fixed Internet Services  
from Q2 2024 to Q2 2025



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Subscription TV



# Subscription TV



TOTAL NUMBER  
OF  
SUBSCRIPTIONS

197,700



Y-o-Y  
PERCENT  
CHANGE

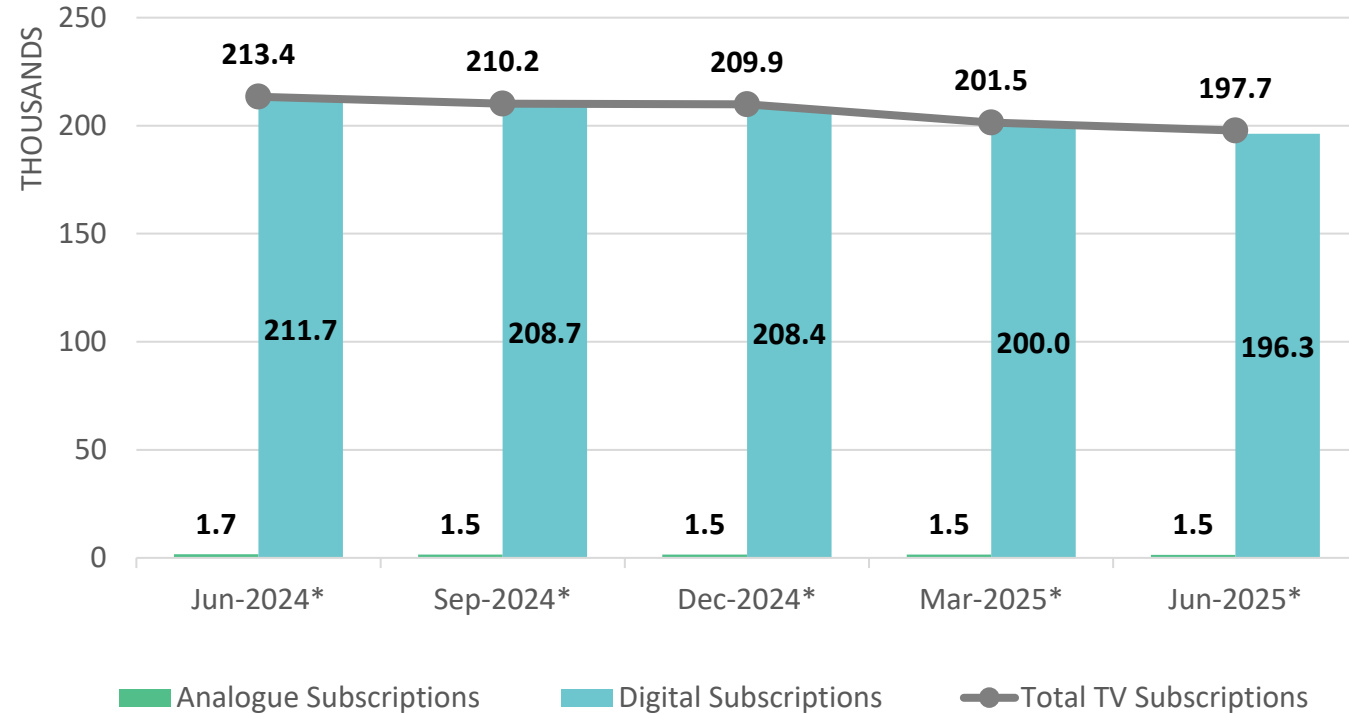
-7.4%



Q-o-Q  
PERCENT  
CHANGE

-1.9%

Number of Subscription TV Subscriptions  
from Q2 2024 to Q2 2025



TV Subscriptions refer to subscriptions to Subscription TV services

*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Subscription TV Penetration

SUBSCRIPTION TV  
PENETRATION PER  
100 INHABITANTS

14.5

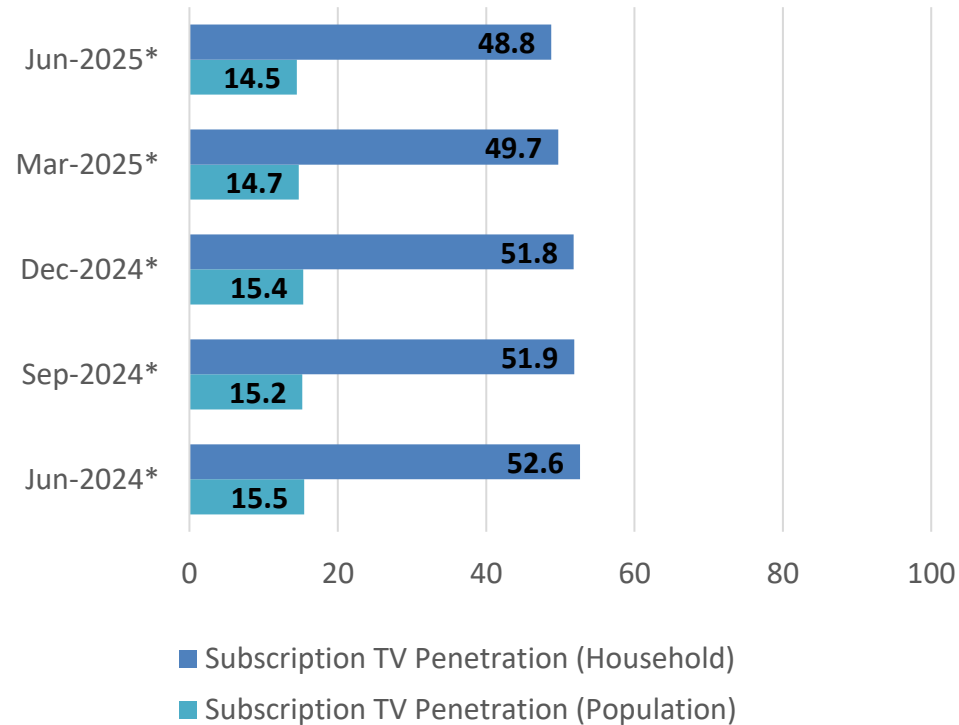
Y-o-Y  
PERCENT  
CHANGE

-6.5%

Q-o-Q  
PERCENT  
CHANGE

-1.4%

Penetration Rates of Pay TV Services  
from Q2 2024 to Q2 2025



SUBSCRIPTION TV  
PENETRATION PER  
100 HOUSEHOLDS

48.8

Y-o-Y  
PERCENT  
CHANGE

-7.2%

Q-o-Q  
PERCENT  
CHANGE

-1.8%

*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Subscription TV Revenues



GROSS  
REVENUES

**\$146m**



Y-o-Y  
PERCENT  
CHANGE

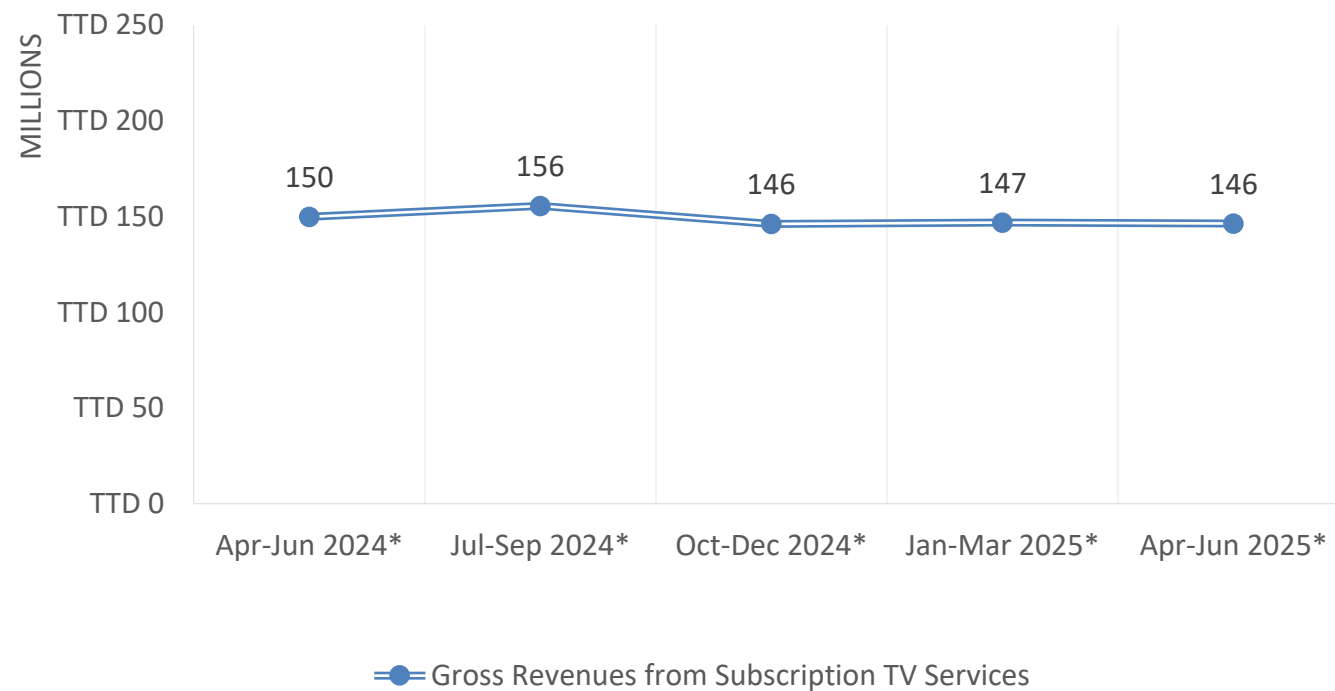
**-2.7%**



Q-o-Q  
PERCENT  
CHANGE

**-0.7%**

GROSS REVENUES FROM SUBSCRIPTION TV SERVICES  
FROM Q2 2024 TO Q2 2025



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Subscription TV

## Average Revenue Per User

ARPU

\$ **\$735**



Y-o-Y  
PERCENT  
CHANGE

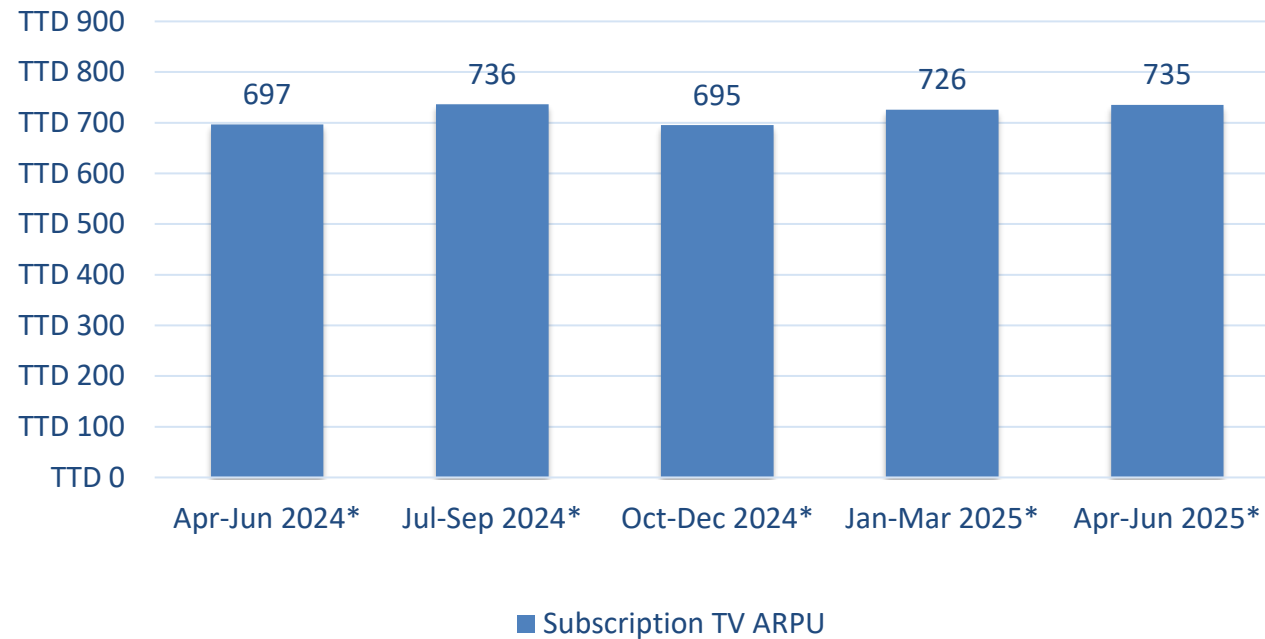
**5.5%**



Q-o-Q  
PERCENT  
CHANGE

**1.2%**

ARPU for Subscription TV Services  
from Q2 2024 to Q2 2025



*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Subscription TV HHI



HHI

3,579



Y-o-Y  
PERCENT  
CHANGE

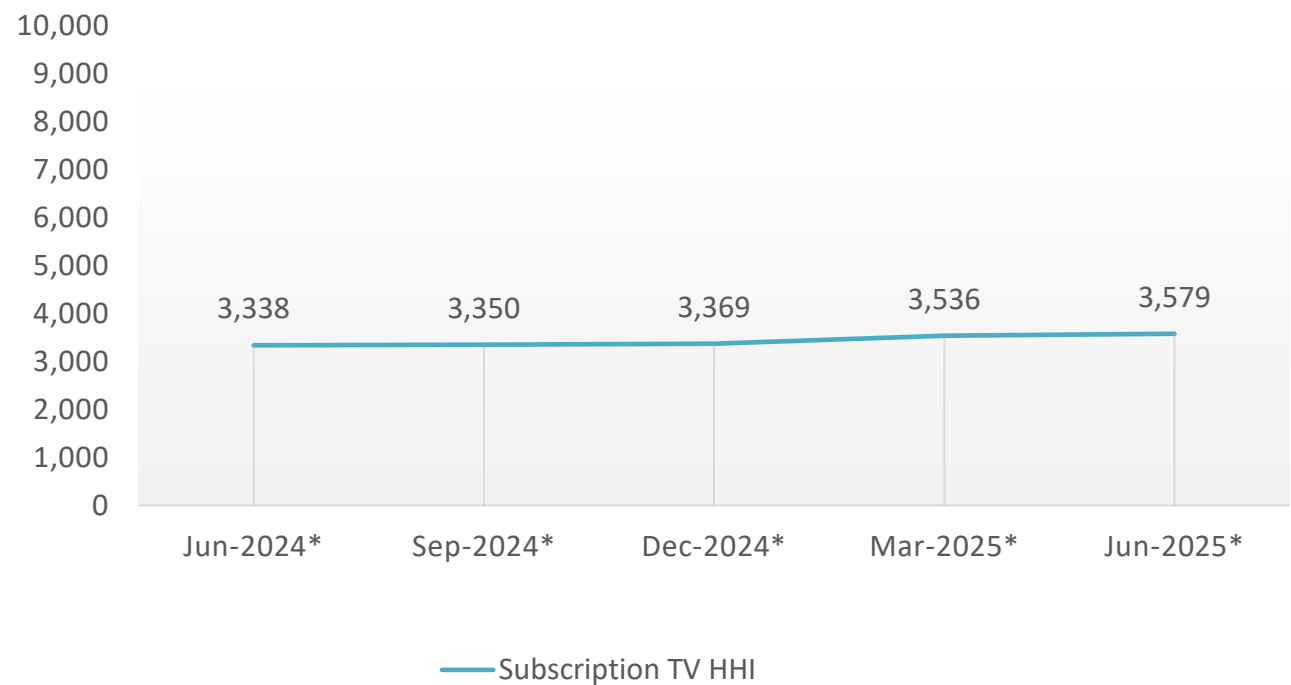
7.2%



Q-o-Q  
PERCENT  
CHANGE

1.2%

HHI for Subscription TV Services  
from Q2 2024 to Q2 2025

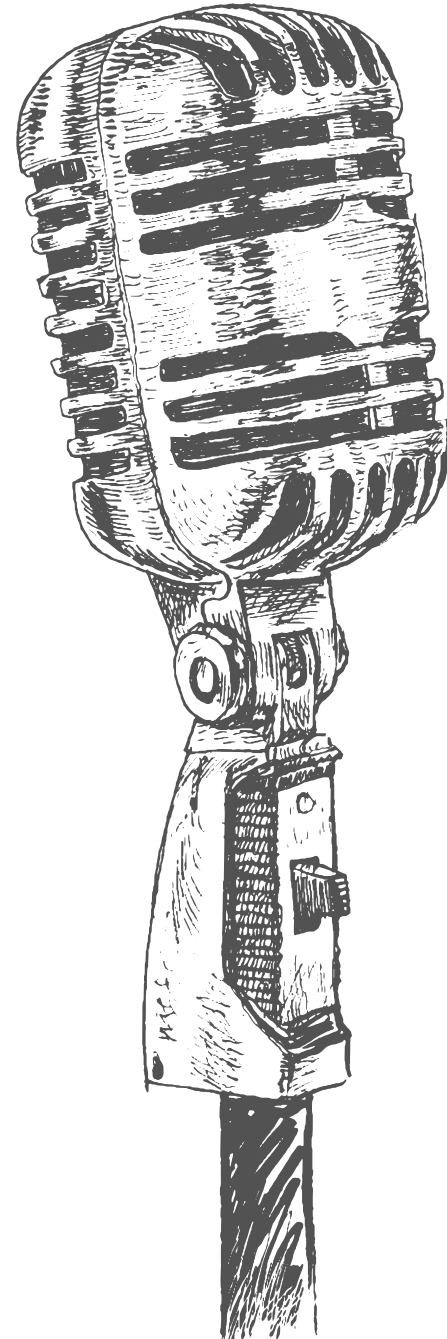


*\* Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: Greendot Limited*

# Free-to-Air Radio

9/19/2025

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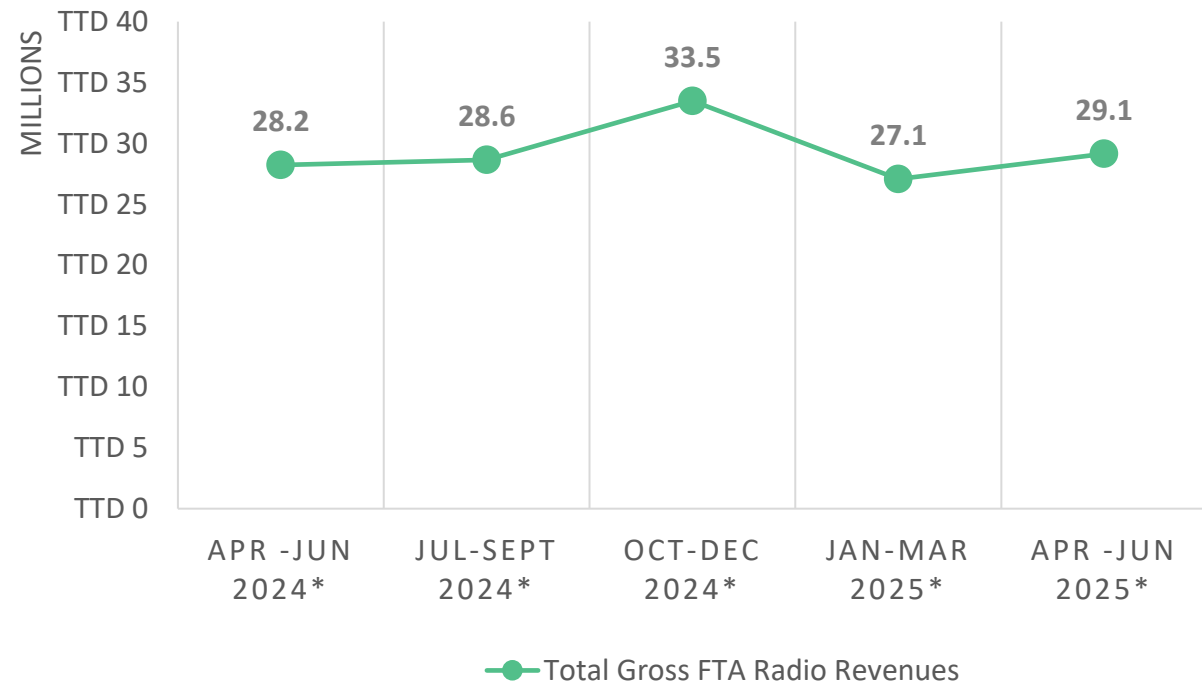
# Free-to-Air Radio Revenues

GROSS  
REVENUES  
\$  
**\$29.1m**

Y-o-Y  
PERCENT  
CHANGE  
**3.2%**

Q-o-Q  
PERCENT  
CHANGE  
**7.4%**

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES  
FROM Q2 2024 TO Q2 2025



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*  
*Q2 2024-Q2 2025: Kaisoca, Trinibashment Limited, Trinidad and Tobago Radio Network, Upward Trend*  
*Q4 2024: PBCT*  
*Q2 2025: Heritage Radio*

# Free-to-Air Radio HHI



HHI  
**462**

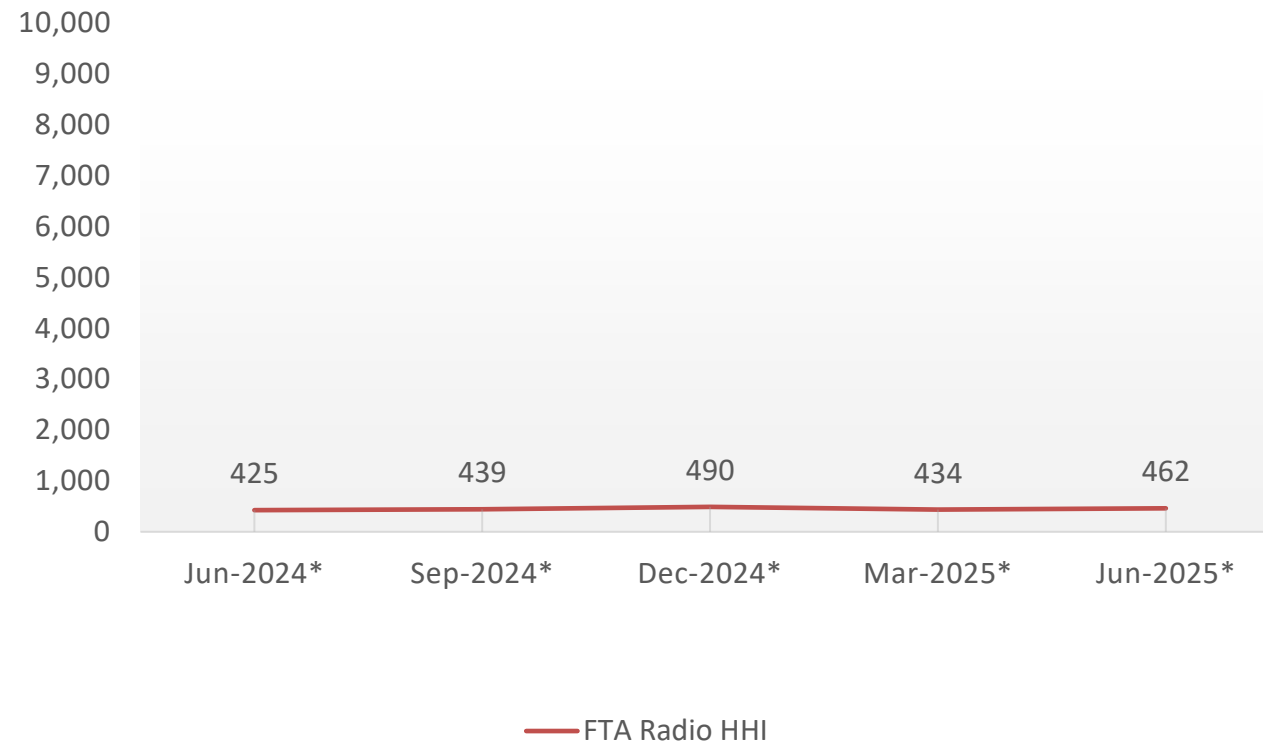


Y-o-Y  
PERCENT  
CHANGE  
**8.7%**



Q-o-Q  
PERCENT  
CHANGE  
**6.5%**

HHI for Free to Air Radio Services  
from Q2 2024 to Q2 2025

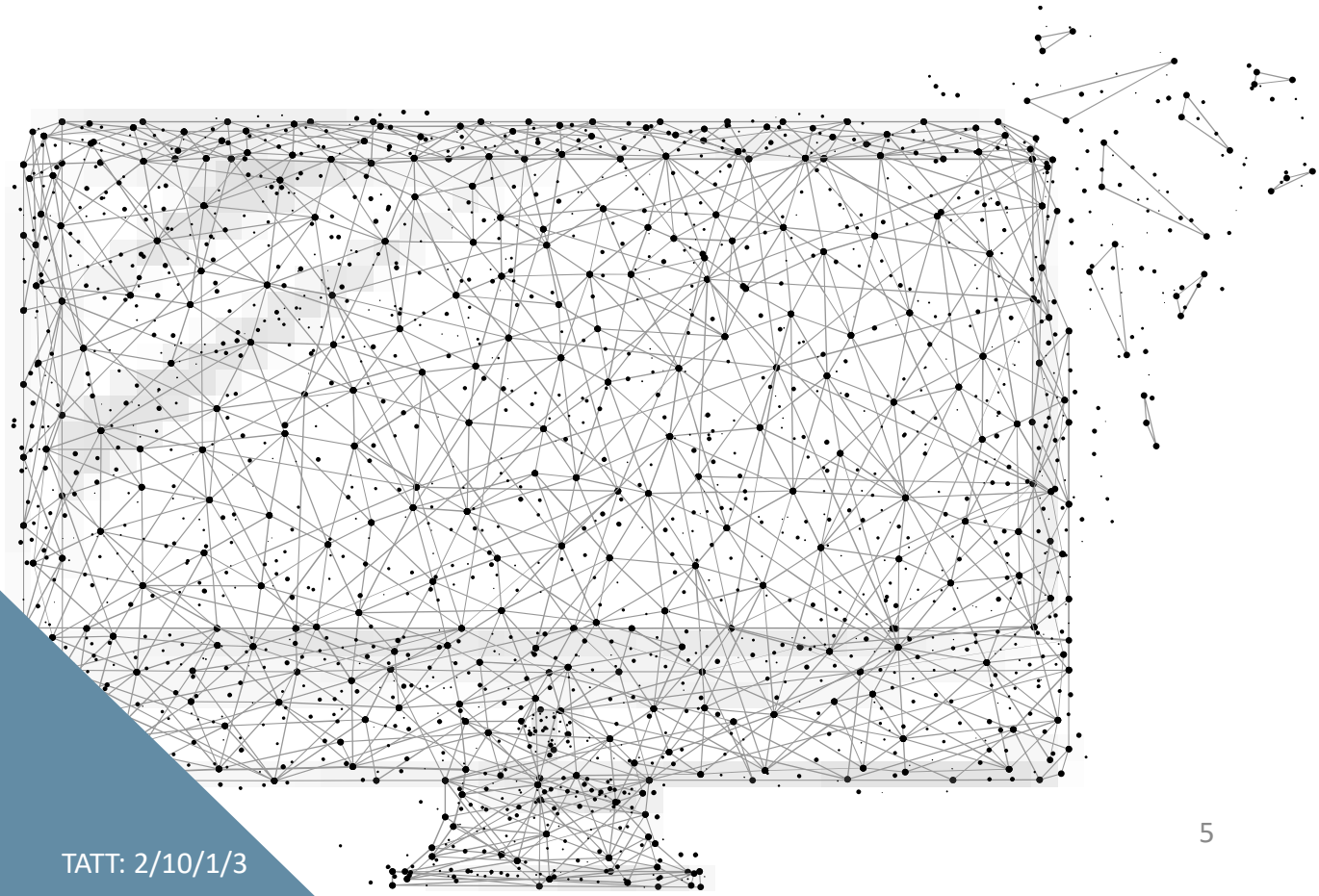


- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*  
*Q2 2024-Q2 2025: Kaisoca, Trinibashment Limited, Trinidad and Tobago Radio Network, Upward Trend*  
*Q4 2024: PBCT*  
*Q2 2025: Heritage Radio*

# Free-to-Air TV

9/19/2025

TATT: 2/10/1/3



# Free-to-Air TV Revenues



GROSS  
REVENUES

\$14.9m



Y-o-Y  
PERCENT  
CHANGE

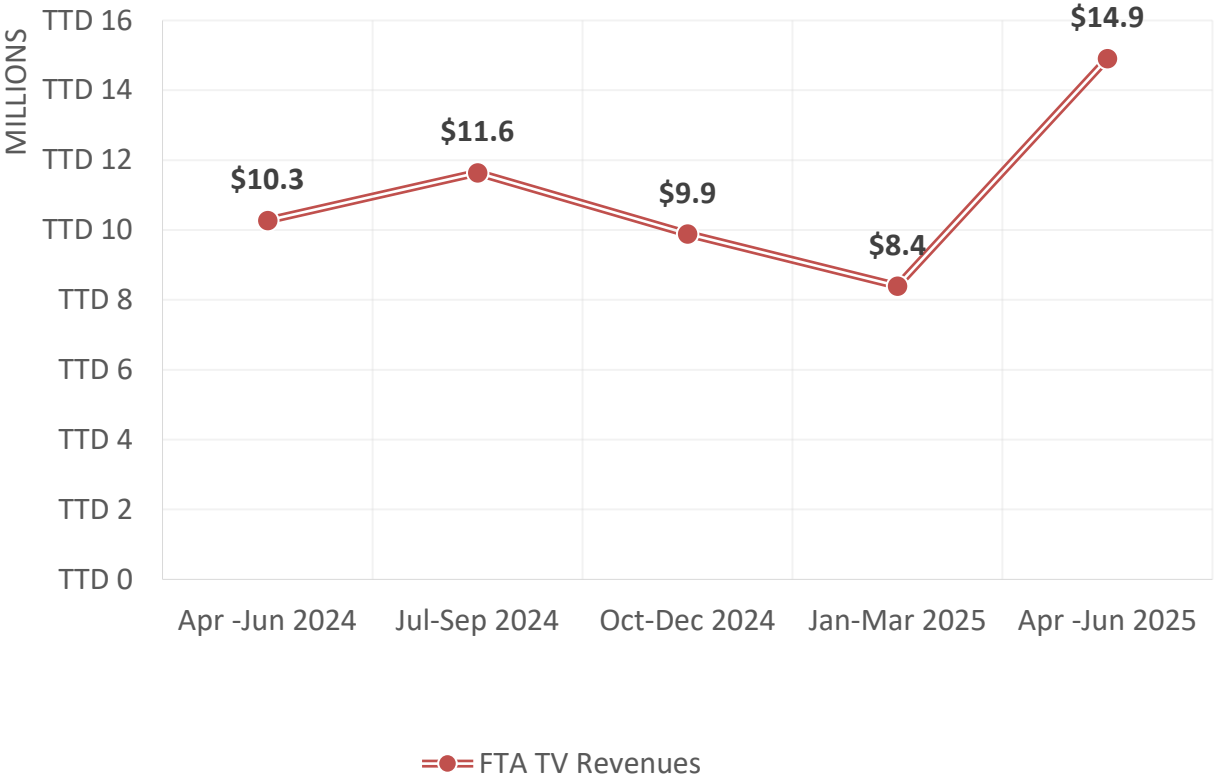
44.7%



Q-o-Q  
PERCENT  
CHANGE

77.4%

GROSS REVENUES FROM FREE TO AIR TV SERVICES  
FROM Q2 2024 TO Q2 2025



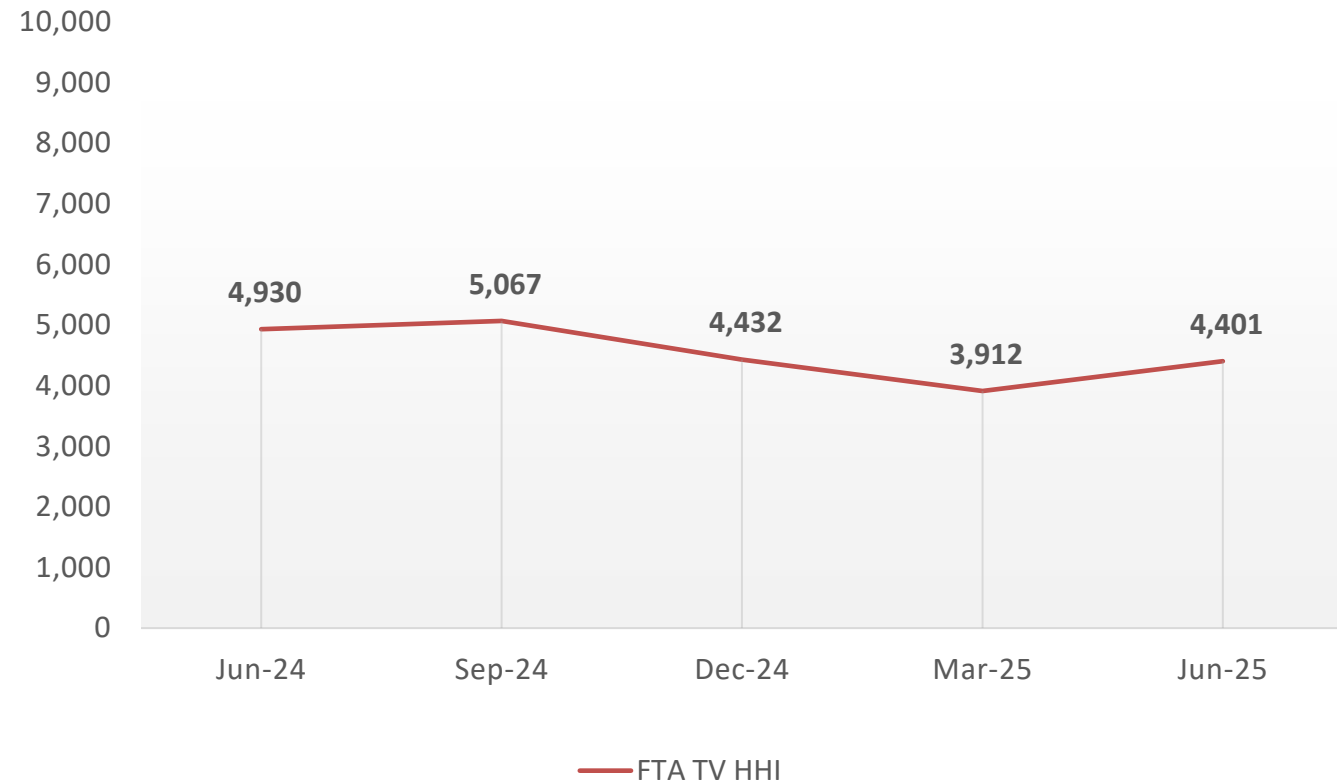
# Free-to-Air TV HHI

HHI  
**4,401**

Y-o-Y  
PERCENT  
CHANGE  
**-10.7%**

Q-o-Q  
PERCENT  
CHANGE  
**12.5%**

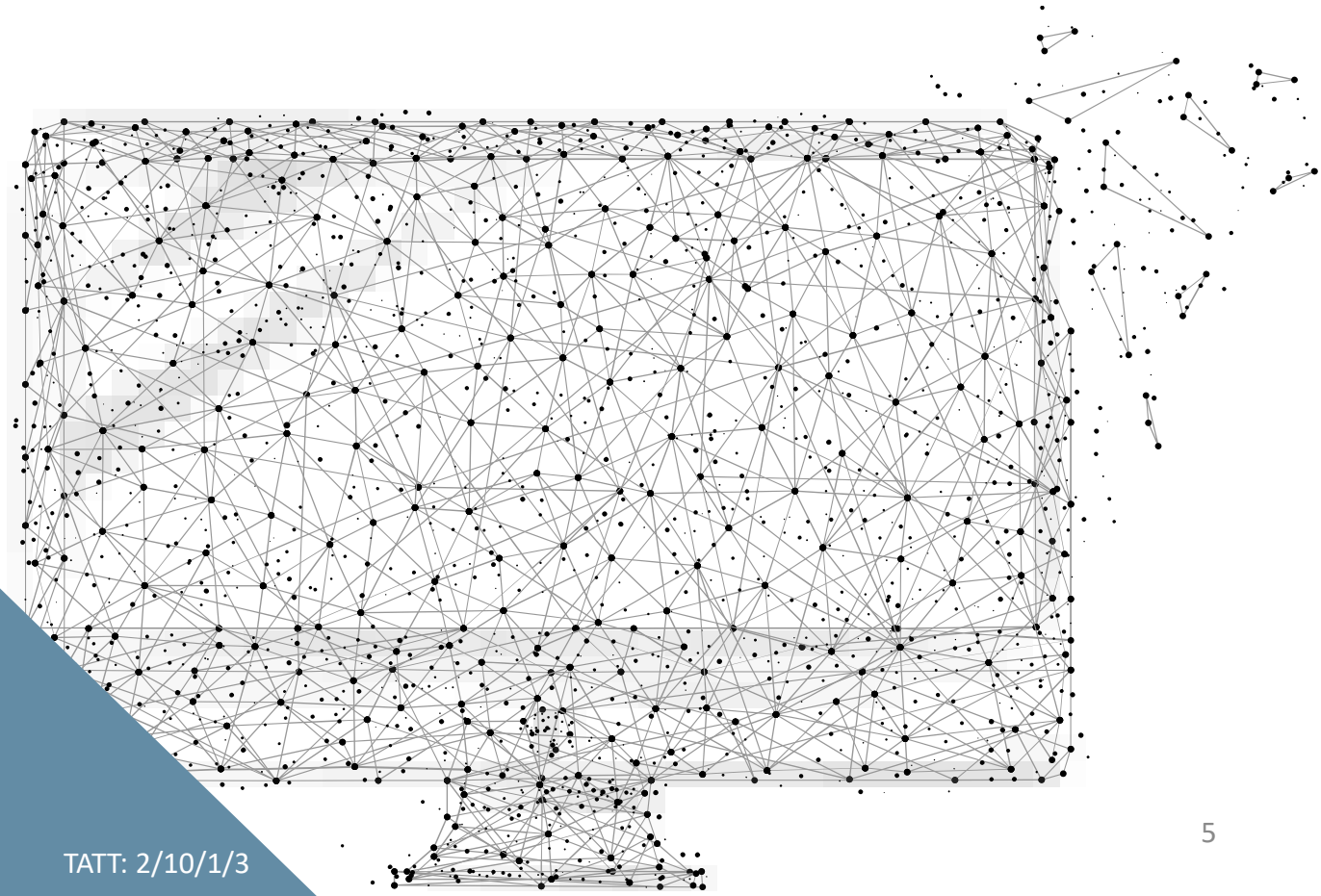
HHI for Free to Air TV Services  
Q2 2024 to Q2 2025



# Broadcasting Service via Cable TV

9/19/2025

TATT: 2/10/1/3



# Broadcasting Service via Cable TV Revenues



GROSS  
REVENUES

\$1.8m



Y-o-Y  
PERCENT  
CHANGE

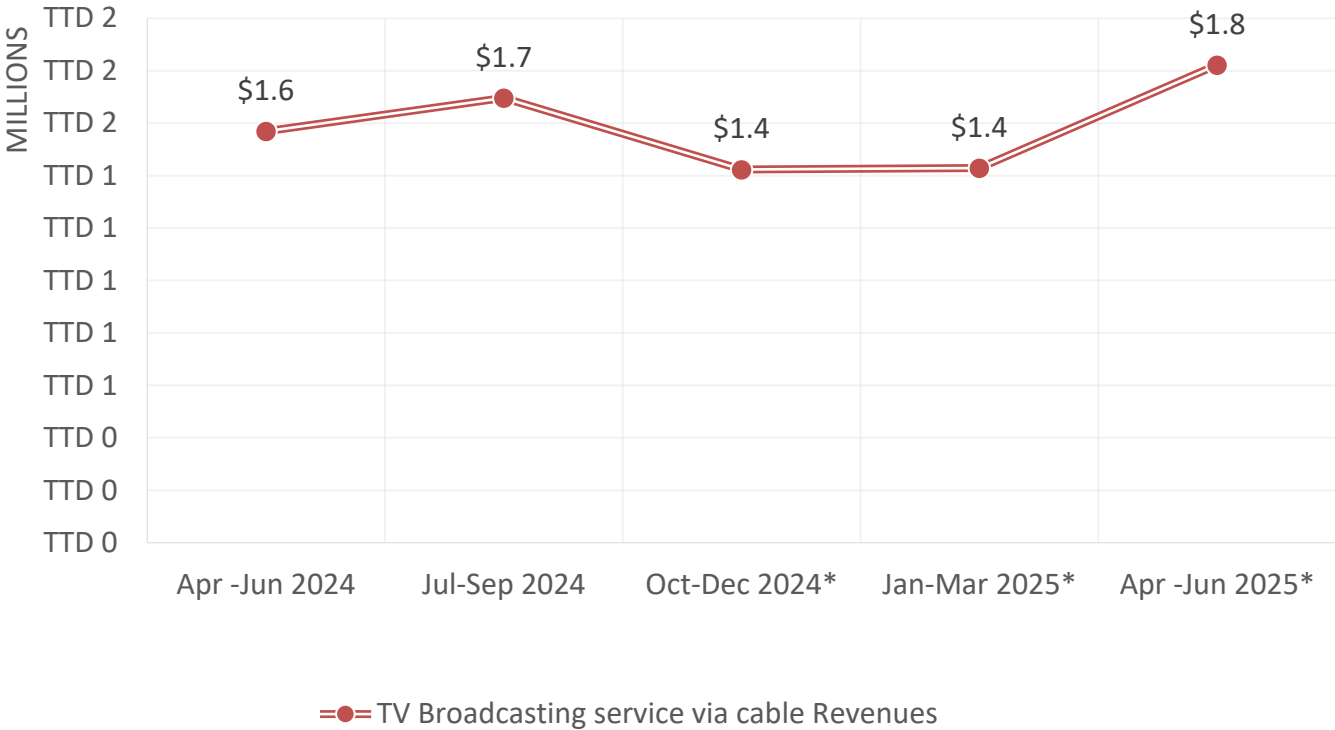
12.5%



Q-o-Q  
PERCENT  
CHANGE

28.6%

GROSS REVENUES BROADCASTING SERVICE VIA CABLE  
FROM Q2 2024 TO Q2 2025



• Data estimated for the following concessionaires who had not submitted data at the date of publication:  
Q2 2024 – Q2 2025: WI Sports

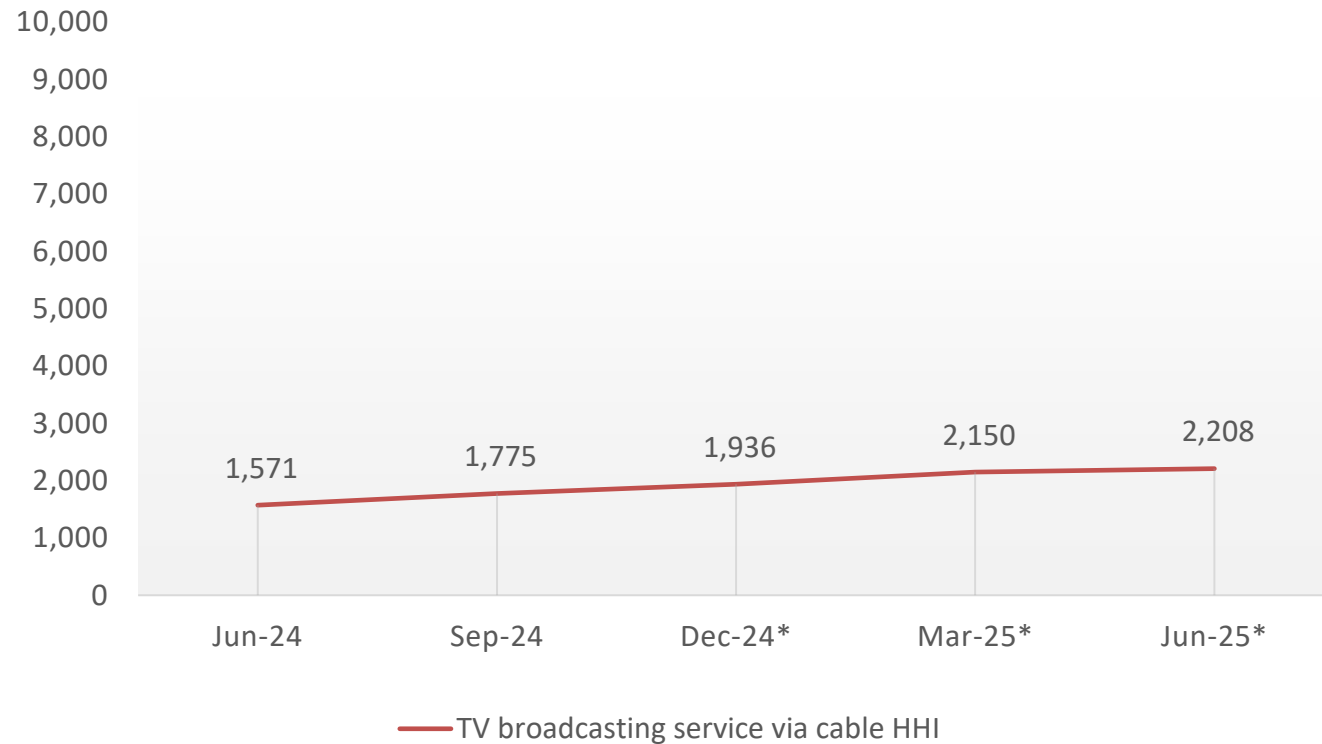
# Broadcasting Service via Cable HHI

HHI  
**2,208**

Y-o-Y  
PERCENT  
CHANGE  
**40.5%**

Q-o-Q  
PERCENT  
CHANGE  
**2.7%**

HHI for Broadcasting Service via Cable  
Q2 2024 to Q2 2025



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*  
*Q4 2024: WI Sports*

# QUARTERLY MARKET UPDATE

April to June 2025

