

QUARTERLY MARKET UPDATE

January to March 2026



Quarterly Market Update – Q1 2026

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TATT: 2/10/1/3

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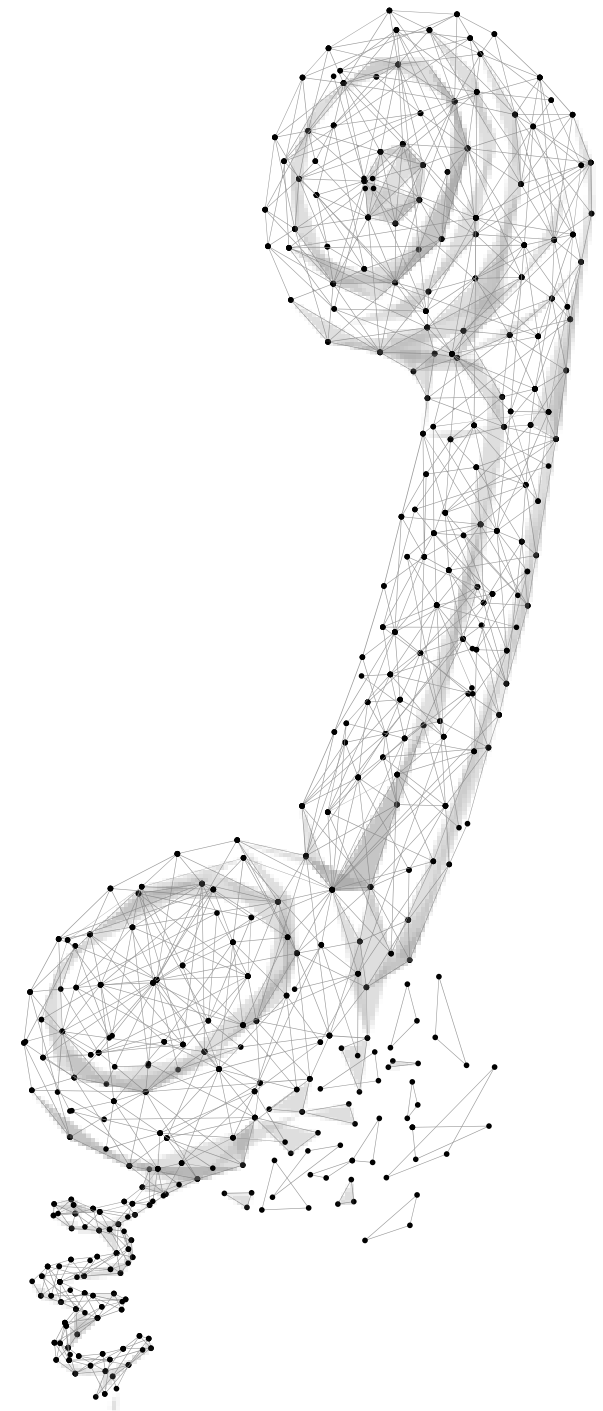
Notes

1. Penetration rates have been calculated using the Central Statistical Office figures as follows:
 - a) 1,367,764 - 2025 Mid-year population estimate
 - b) Number of households - 401,382 (Trinidad and Tobago 2011 Population and Housing Census Demographic Report, Central Statistical Office)
2. Average Revenue Per User (ARPU) is calculated for each quarter using total quarterly revenues divided by subscriptions.
3. The change in Fixed Internet subscriptions reported for the first quarter of 2026 reflects a data validation and clean-up exercise undertaken by one of the reporting operators. Accordingly, the reported change should not be interpreted as an actual change in market activity.
4. Fixed Internet revenues for Q1 2025 to Q4 2025 have been revised following the resubmission of data by an operator.

Fixed Voice

7/14/2026

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Fixed Voice Subscriptions



**TOTAL NUMBER OF
SUBSCRIPTIONS**

278,000



**Y-o-Y
PERCENT
CHANGE**

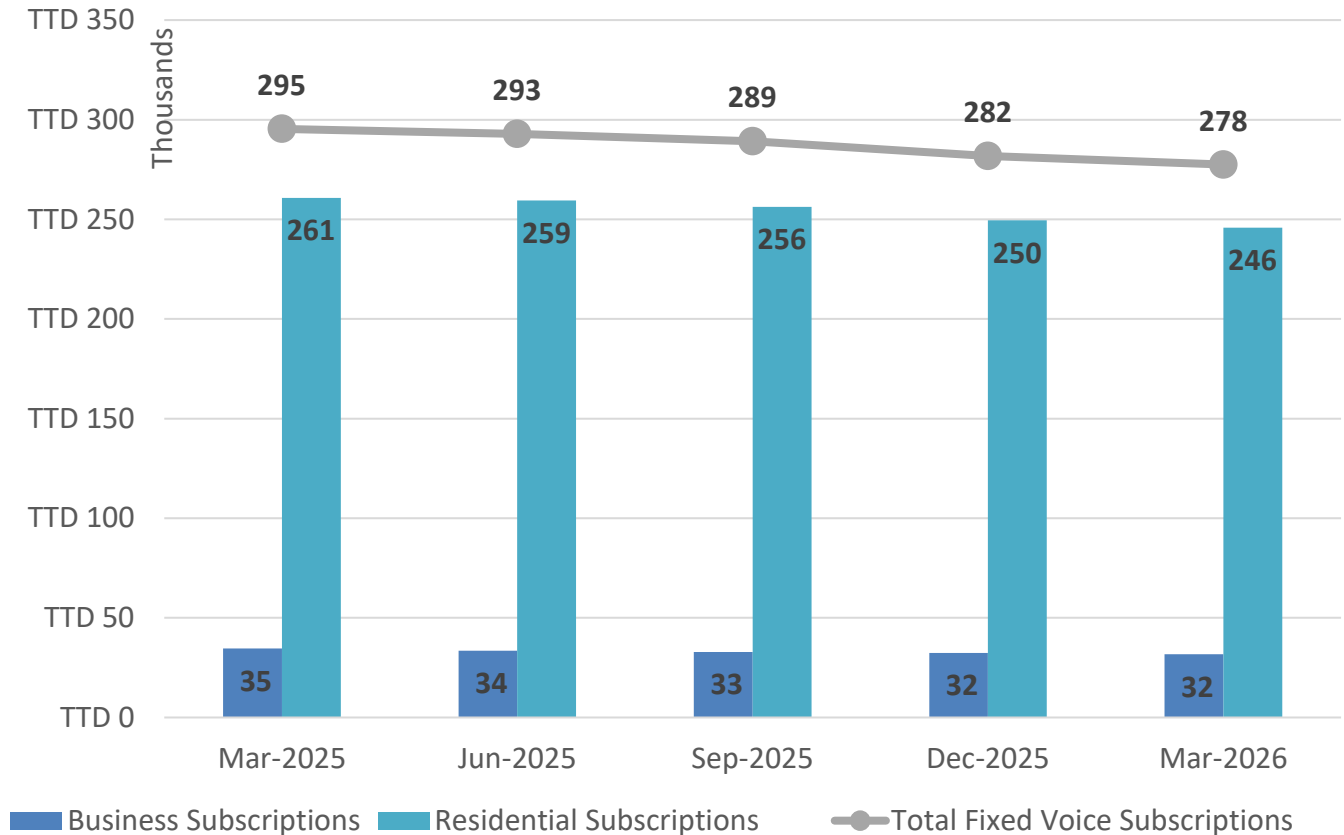
-5.8%



**Q-o-Q
PERCENT
CHANGE**

-1.4%

Number of Fixed Line Subscriptions
Q1 2025 to Q1 2026



Fixed Voice Penetration



**FIXED VOICE
PENETRATION PER
100 INHABITANTS**

20.3



**Y-o-Y
PERCENT
CHANGE**

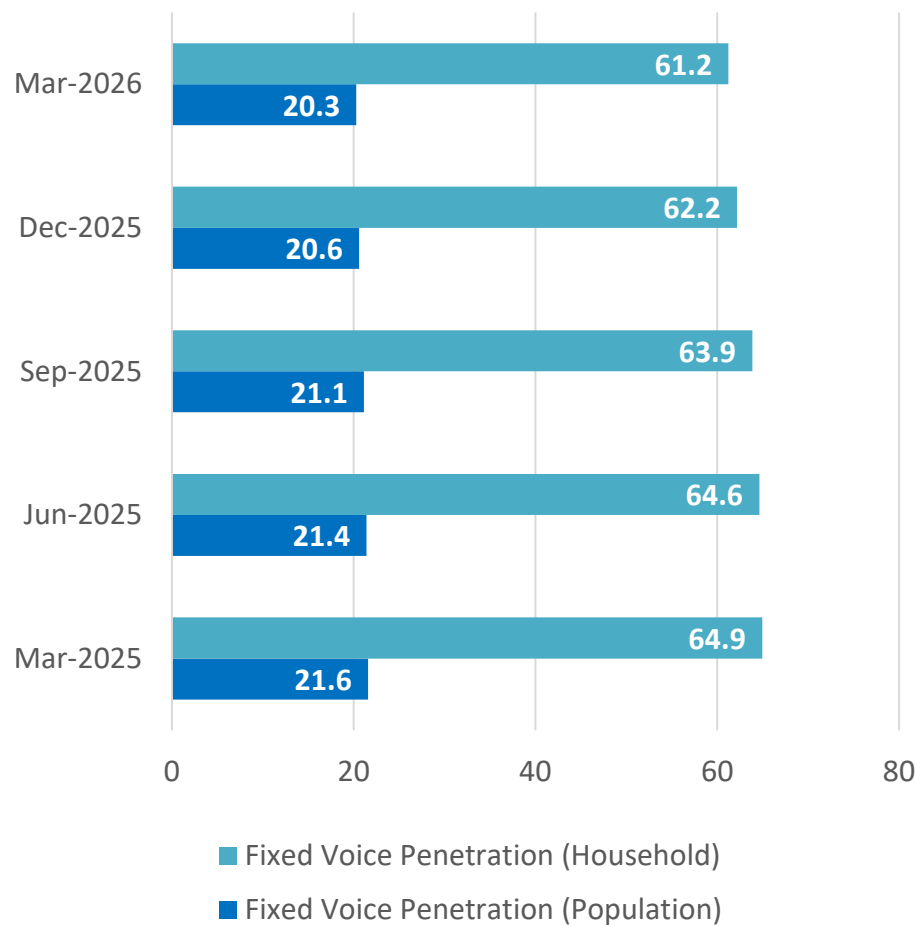
-6.0%



**Q-o-Q
PERCENT
CHANGE**

-1.5%

Penetration Rate of Fixed Line Subscriptions
from Q1 2025 to Q1 2026



**FIXED LINE
PENETRATION PER
100 HOUSEHOLDS**

61.2



**Y-o-Y
PERCENT
CHANGE**

-5.7%



**Q-o-Q
PERCENT
CHANGE**

-1.6%

Fixed Voice Revenues



**GROSS
REVENUES**

\$66.9m



**Y-o-Y
PERCENT
CHANGE**

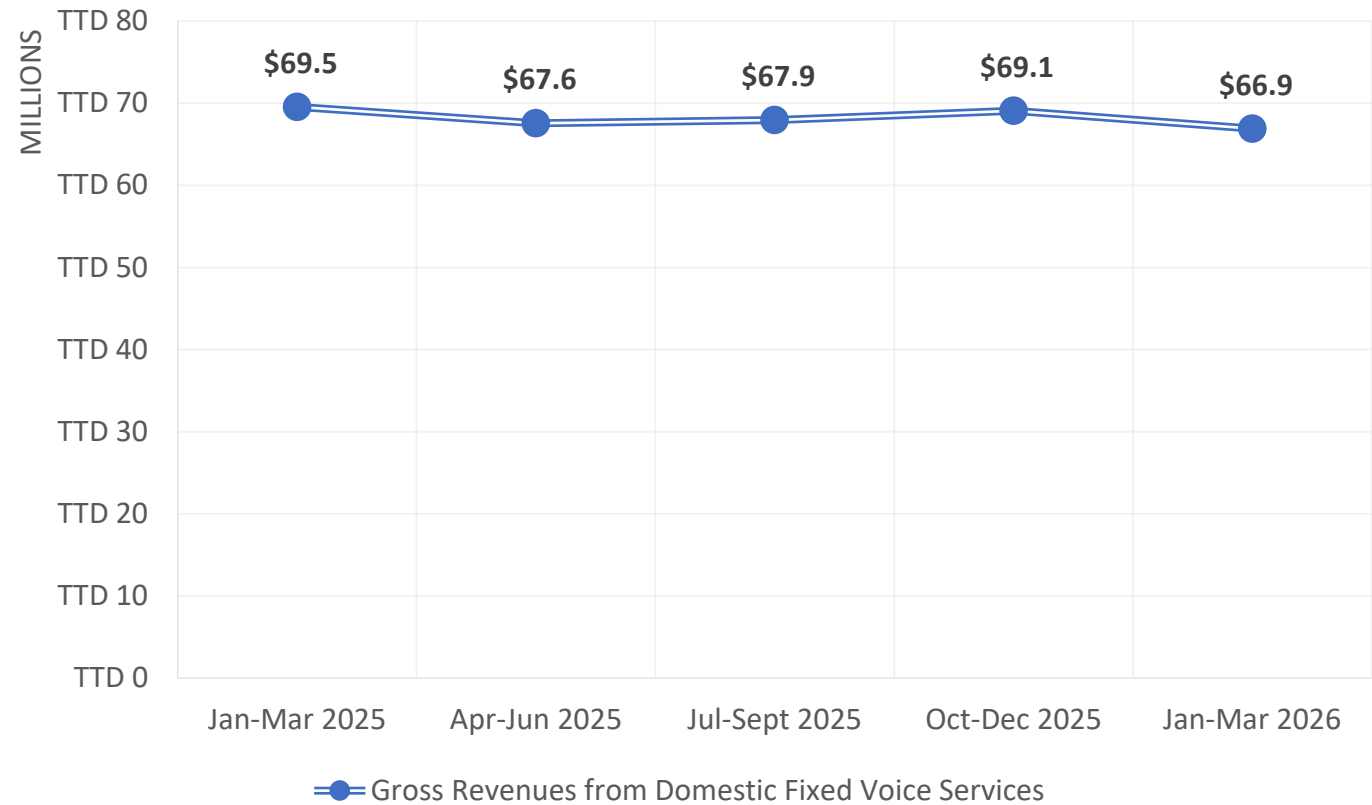
-3.7%



**Q-o-Q
PERCENT
CHANGE**

-3.2%

**GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES
FROM Q1 2025 TO Q1 2026**



Fixed Voice Average Revenue Per User

\$

ARPU

\$241



Y-o-Y
PERCENT
CHANGE

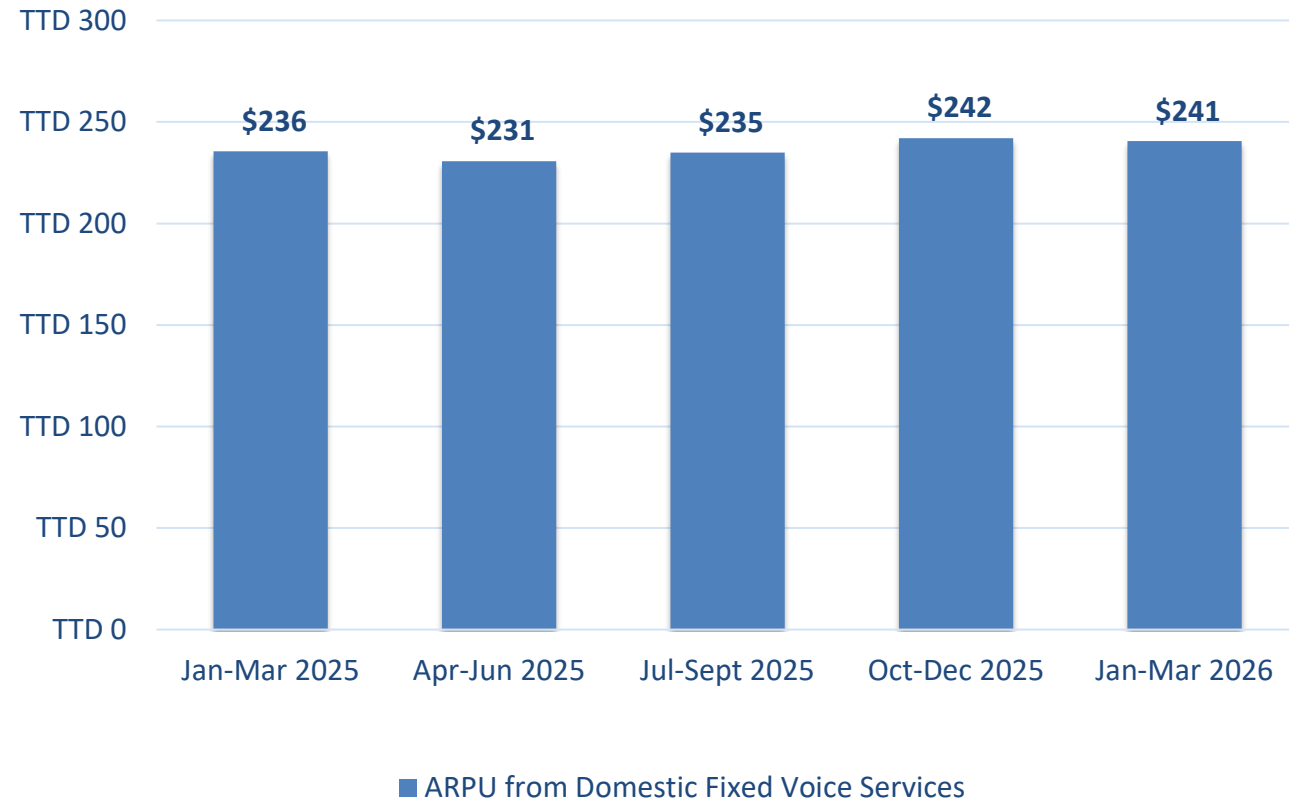
2.1%



Q-o-Q
PERCENT
CHANGE

-0.4%

ARPU from Domestic Fixed Voice Services
from Q1 2025 to Q1 2026



Fixed Voice HHI



HHI

3,130



Y-o-Y
PERCENT
CHANGE

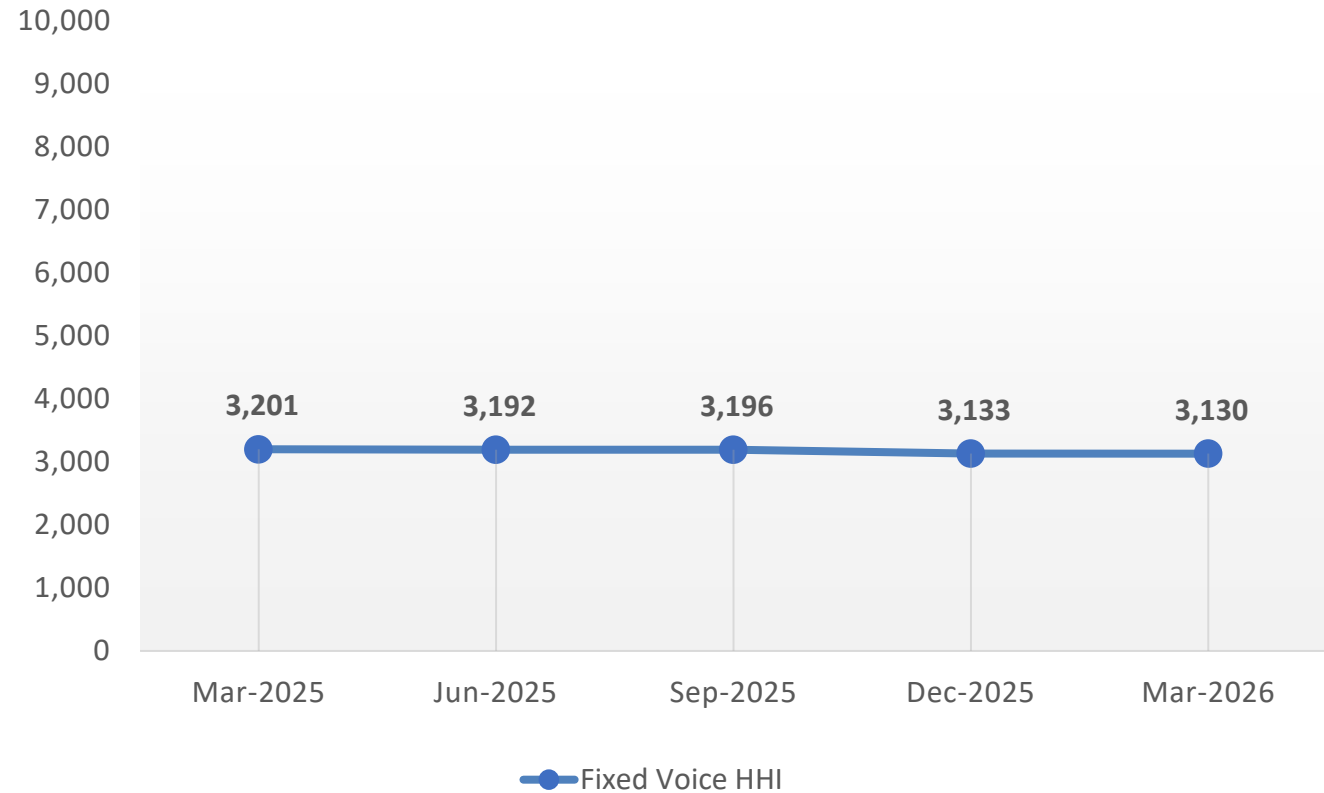
-2.2%



Q-o-Q
PERCENT
CHANGE

-0.1%

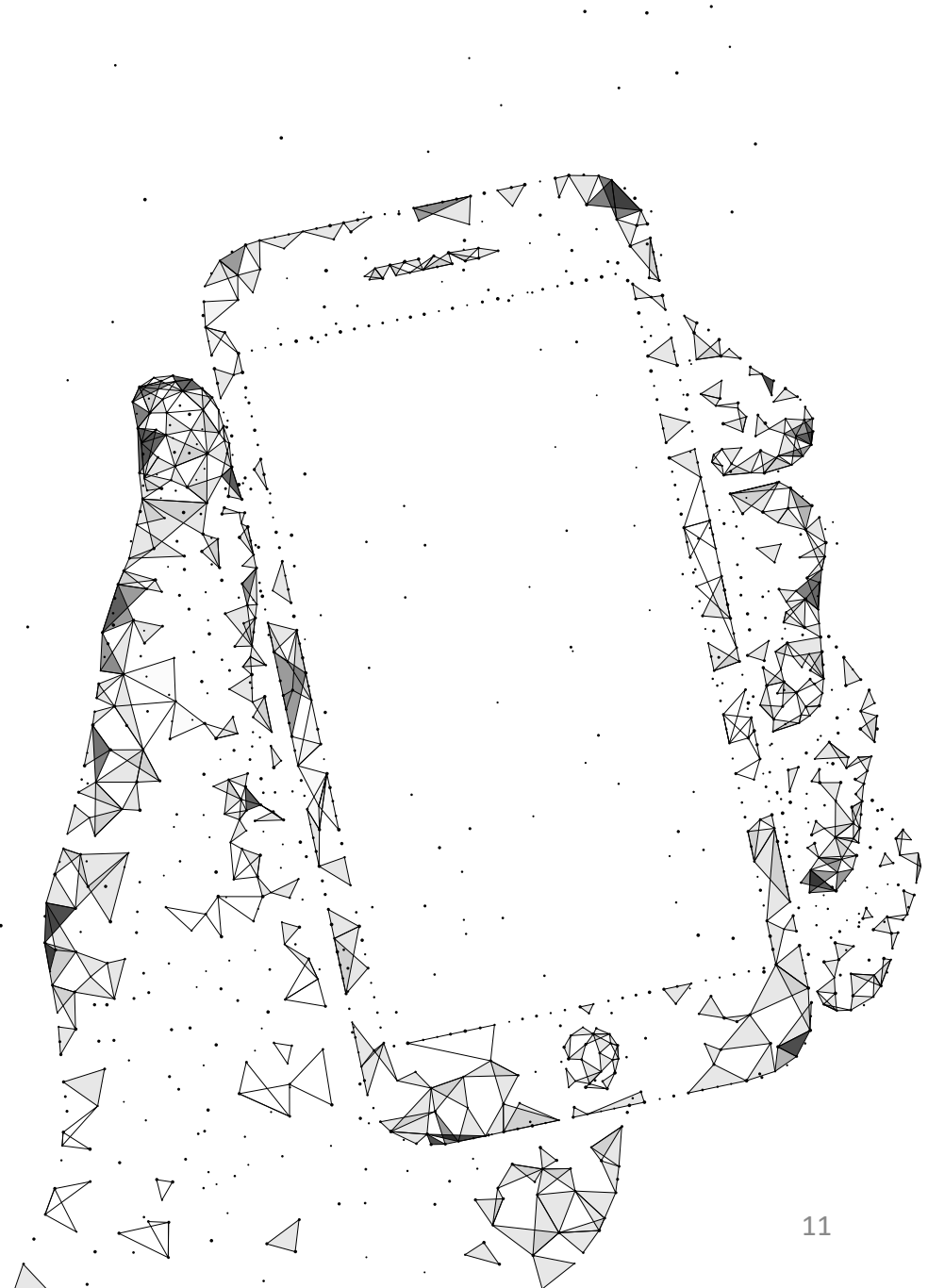
HHI for Domestic Fixed Line
from Q1 2025 to Q1 2026



Mobile Voice

7/14/2025

TATT: 2/10/1/3



Mobile Voice Subscriptions



TOTAL NUMBER OF
SUBSCRIPTIONS

1,716,000



Y-o-Y
PERCENT
CHANGE

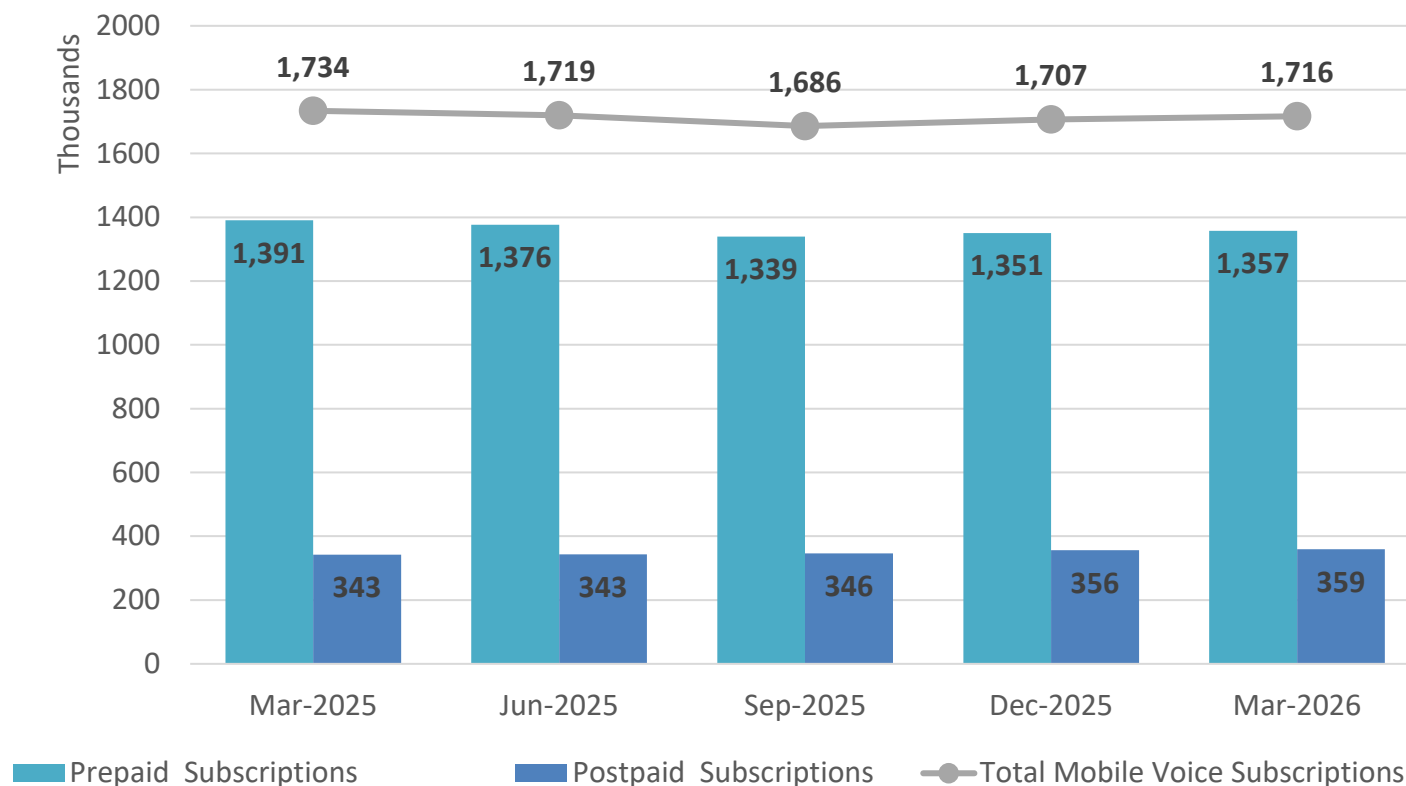
-1.0%



Q-o-Q
PERCENT
CHANGE

0.5%

Number of Mobile Voice Subscriptions
from Q1 2025 to Q1 2026



Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

125.5



**Y-o-Y
PERCENT
CHANGE**

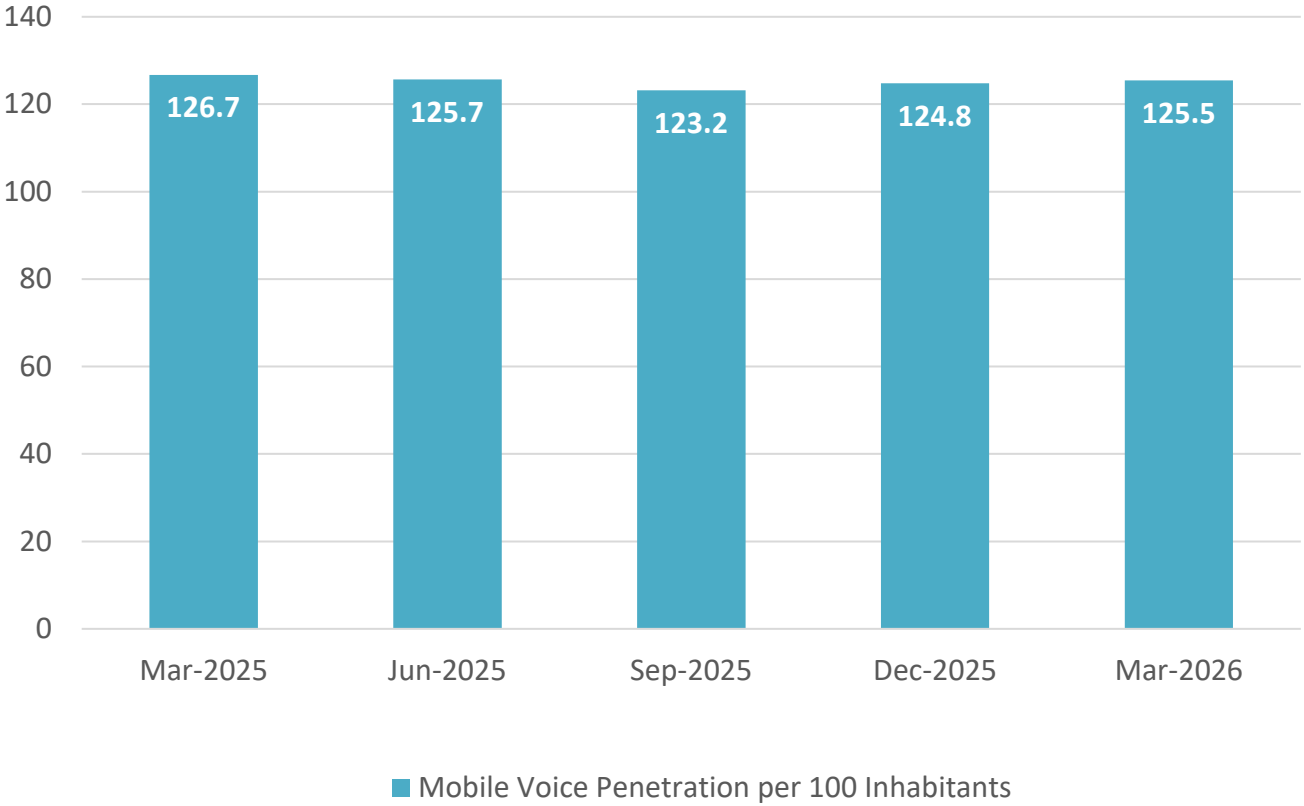
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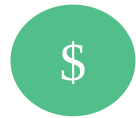
**Q-o-Q
PERCENT
CHANGE**

0.6%

Penetration of Mobile Voice Subscriptions
from Q1 2025 to Q1 2026



Mobile Voice Revenues



GROSS
REVENUES

\$ 164.9m



Y-o-Y
PERCENT
CHANGE

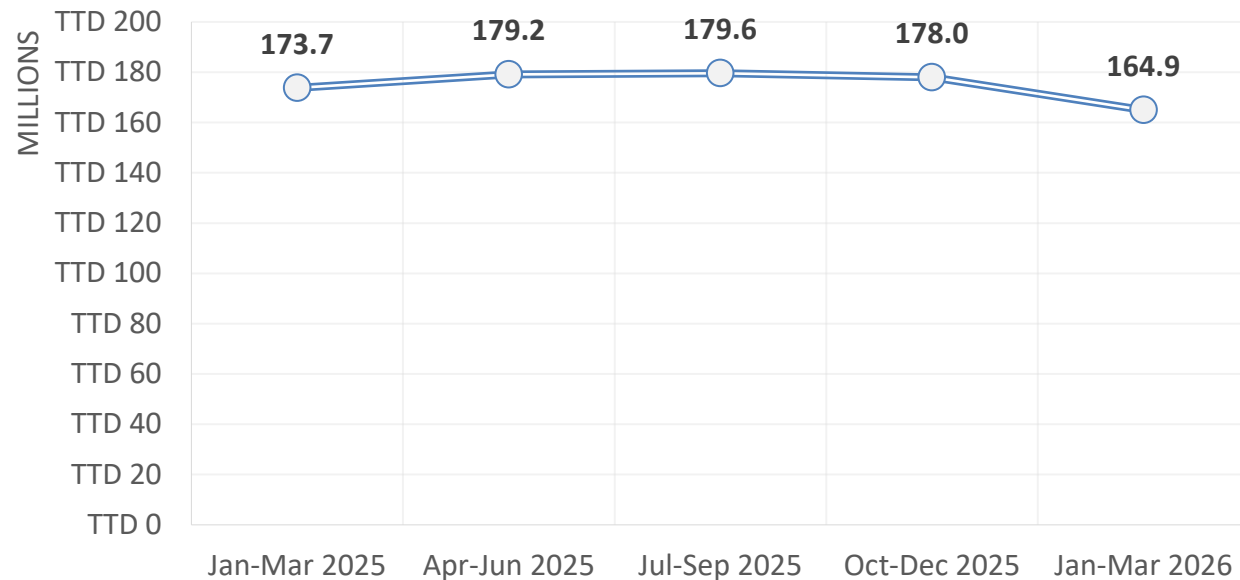
-5.1%



Q-o-Q
PERCENT
CHANGE

-7.4%

REVENUES FROM DOMESTIC MOBILE VOICE SERVICES
FROM Q1 2025 TO Q1 2026



—○— Gross Revenues from Mobile Voice Subscriptions

Average Revenue Per User

Mobile Voice Services



ARPU
\$96.3



Y-o-Y
PERCENT
CHANGE

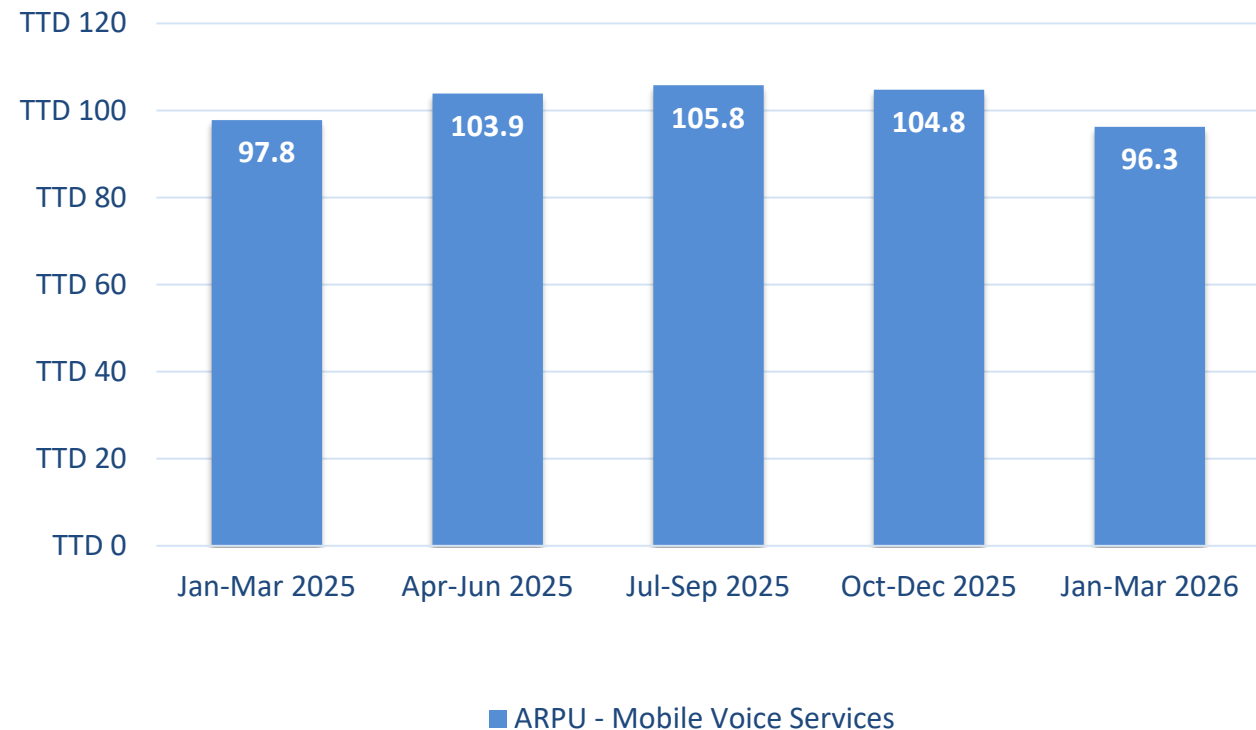
-1.5%



Q-o-Q
PERCENT
CHANGE

-8.1%

ARPU for Domestic Mobile Voice Services
from Q1 2025 to Q1 2026



Mobile Voice HHI



HHI

5,016



Y-o-Y
PERCENT
CHANGE

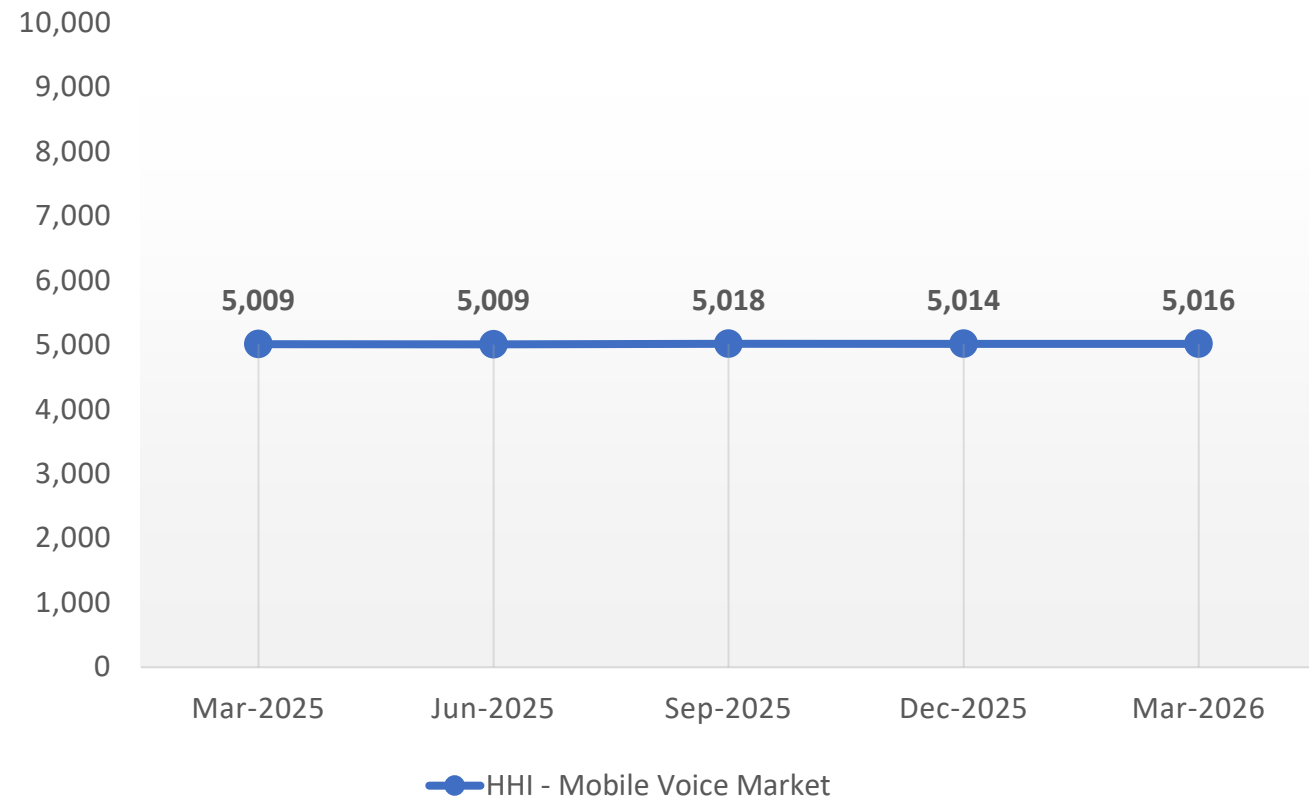
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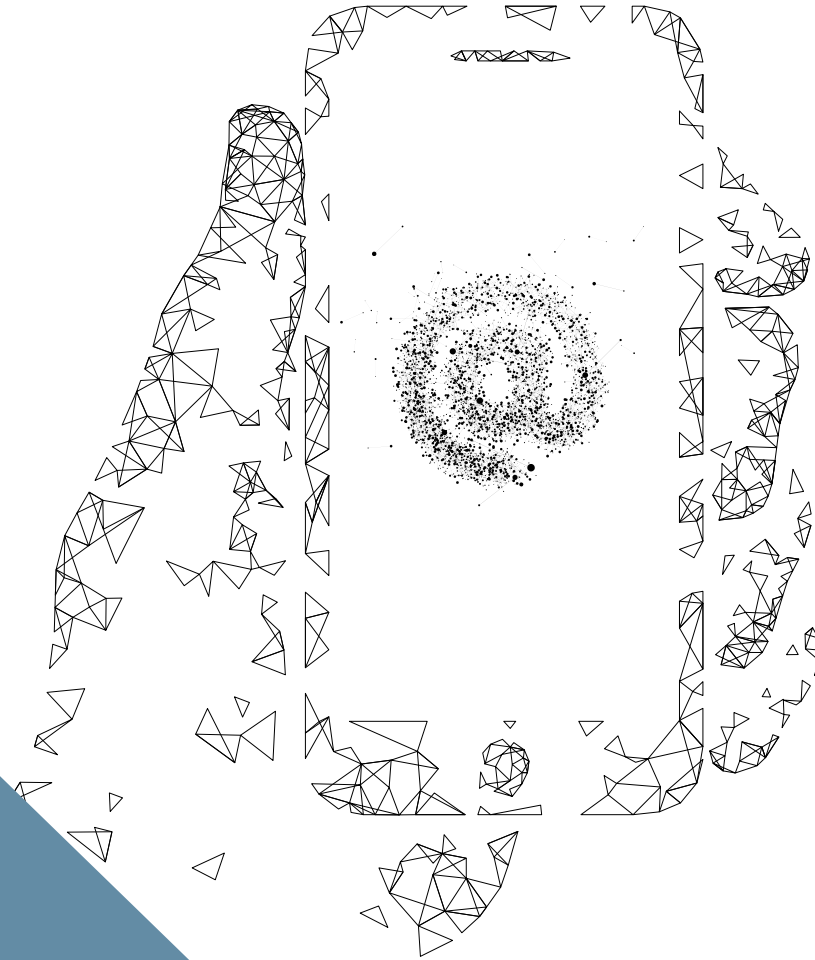
Q-o-Q
PERCENT
CHANGE

-0.04%

HHI for Domestic Mobile Voice Services
from Q1 2025 to Q1 2026



Mobile Internet



Mobile Internet Subscriptions



TOTAL NUMBER OF
SUBSCRIPTIONS

791,000



Y-o-Y
PERCENT
CHANGE

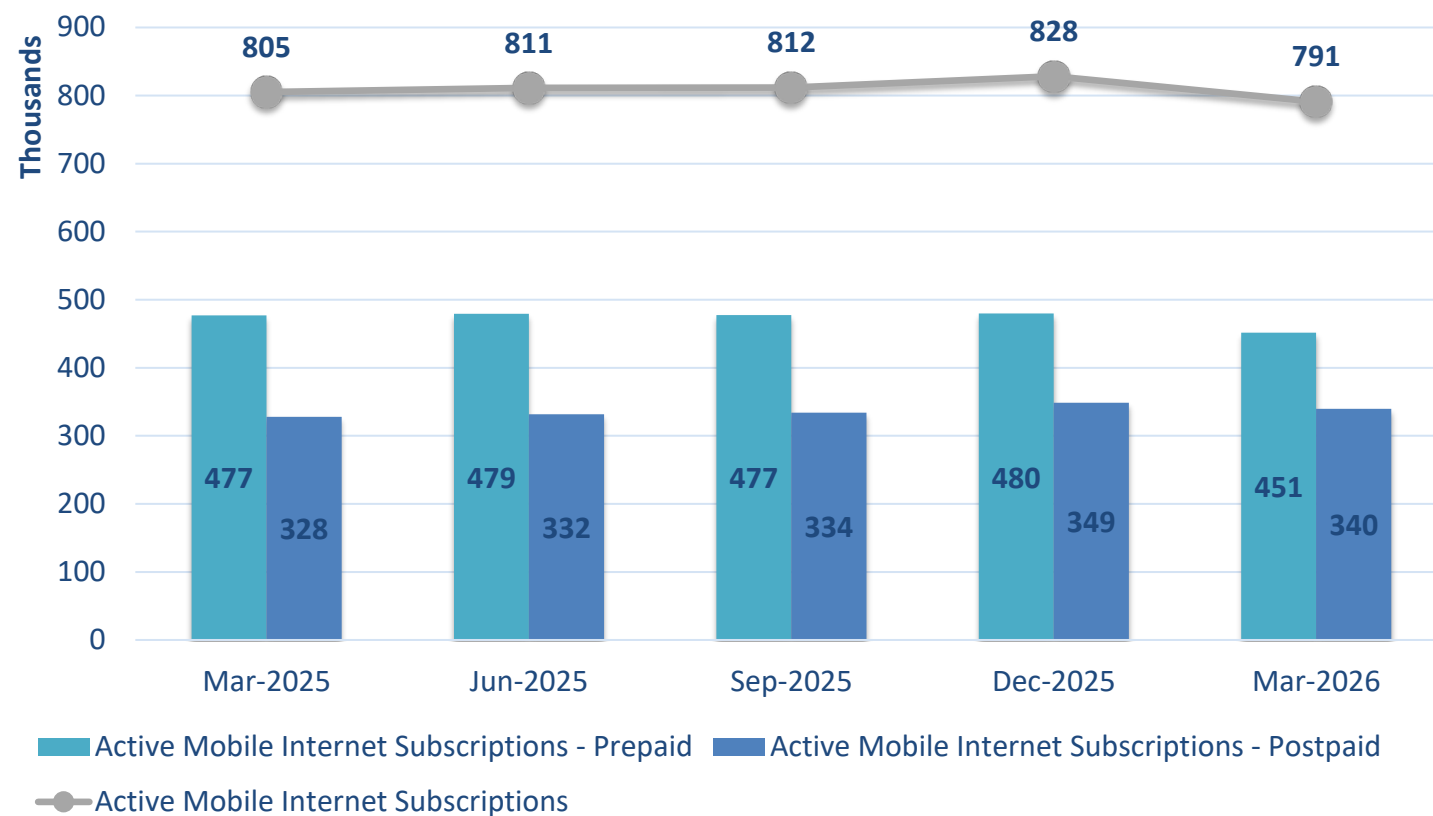
-1.7%



Q-o-Q
PERCENT
CHANGE

-4.5%

Number of Mobile Internet Subscriptions
from Q1 2025 to Q1 2026



Mobile Internet Penetration



**MOBILE INTERNET
PENETRATION PER 100
INHABITANTS**

57.8



**Y-o-Y
PERCENT
CHANGE**

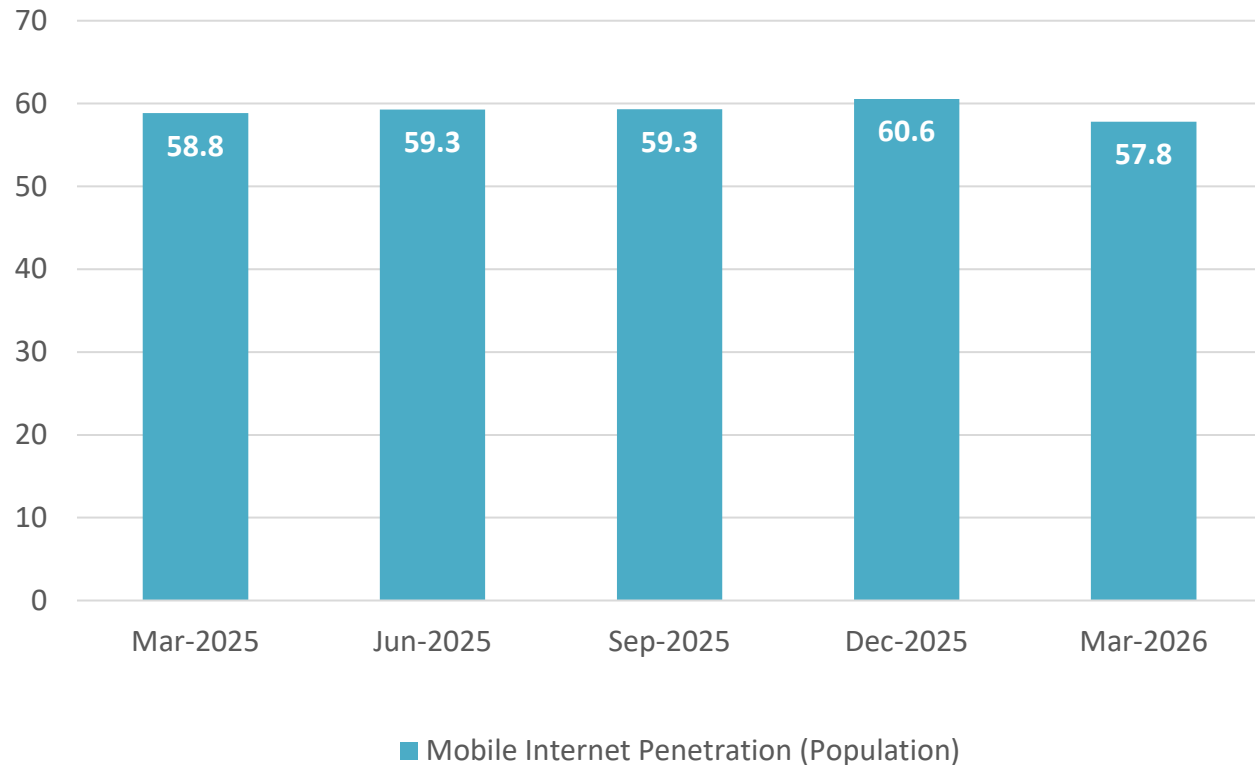
-1.7%



**Q-o-Q
PERCENT
CHANGE**

-4.6%

Penetration of Mobile Internet Subscriptions
from Q1 2025 to Q1 2026



Mobile Internet Revenues

REVENUES FROM DOMESTIC MOBILE INTERNET SERVICES
FROM Q1 2025 TO Q1 2026



GROSS
REVENUES

\$ 322.6m



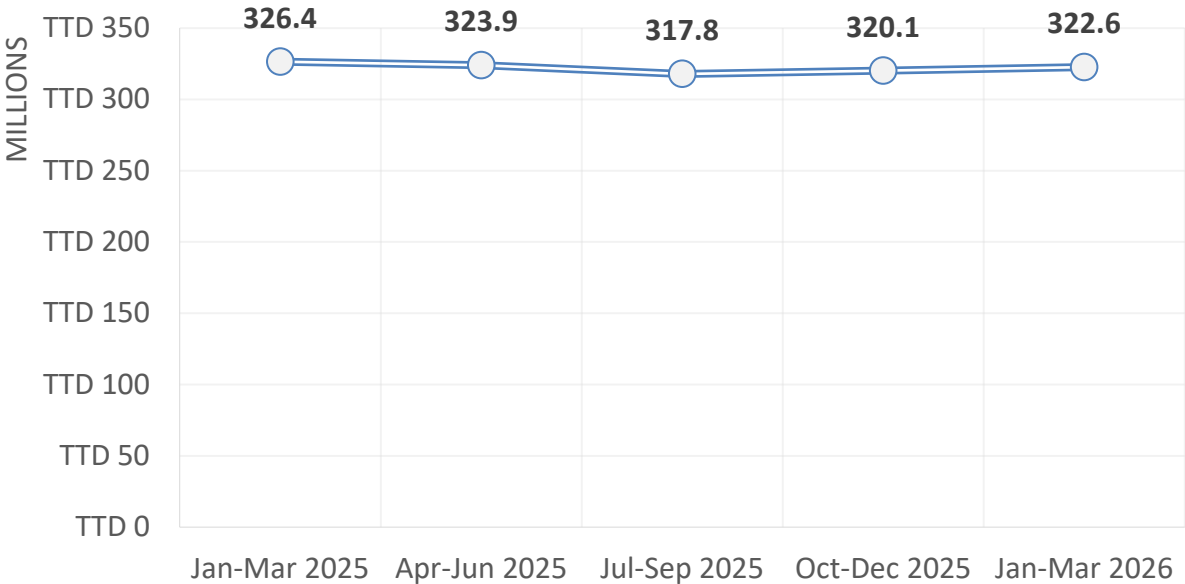
Y-o-Y
PERCENT
CHANGE

-1.2%



Q-o-Q
PERCENT
CHANGE

0.8%



—○— Gross Revenues from Mobile Internet Subscriptions

Average Revenue Per User

Mobile Internet Services



ARPU
\$400.6



Y-o-Y
PERCENT
CHANGE

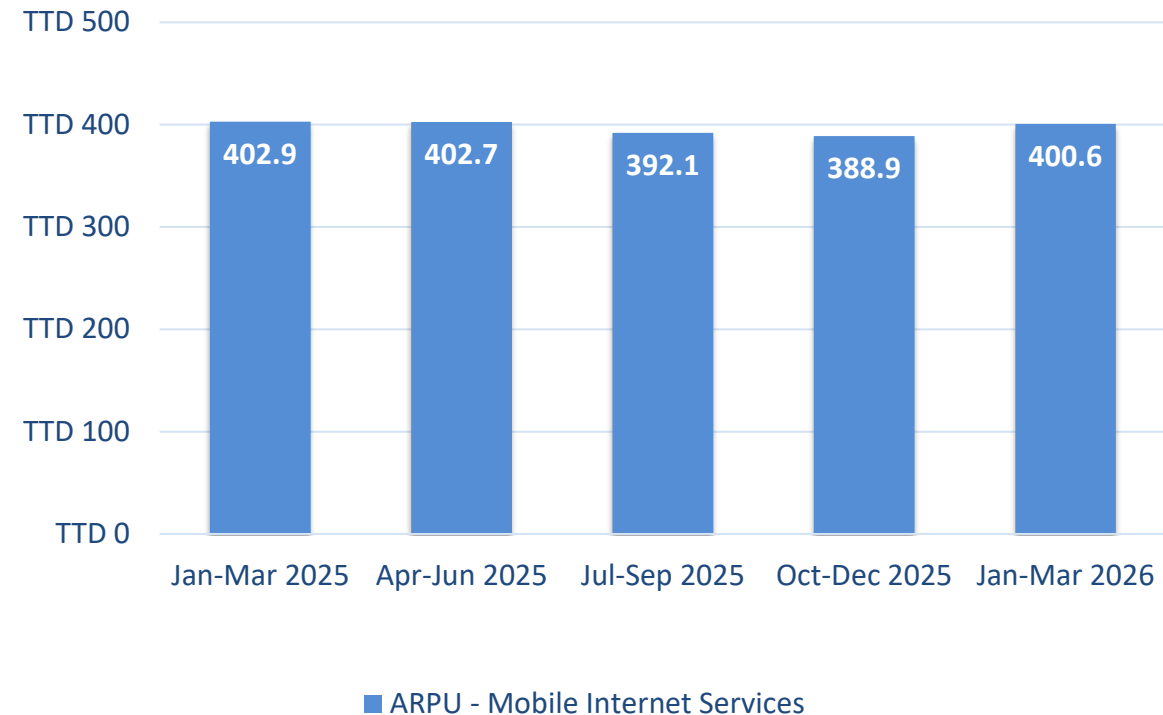
-0.6%



Q-o-Q
PERCENT
CHANGE

3.0%

ARPU for Domestic Mobile Internet Services
from Q1 2025 to Q1 2026



Mobile Internet HHI



HHI

5,324



Y-o-Y
PERCENT
CHANGE

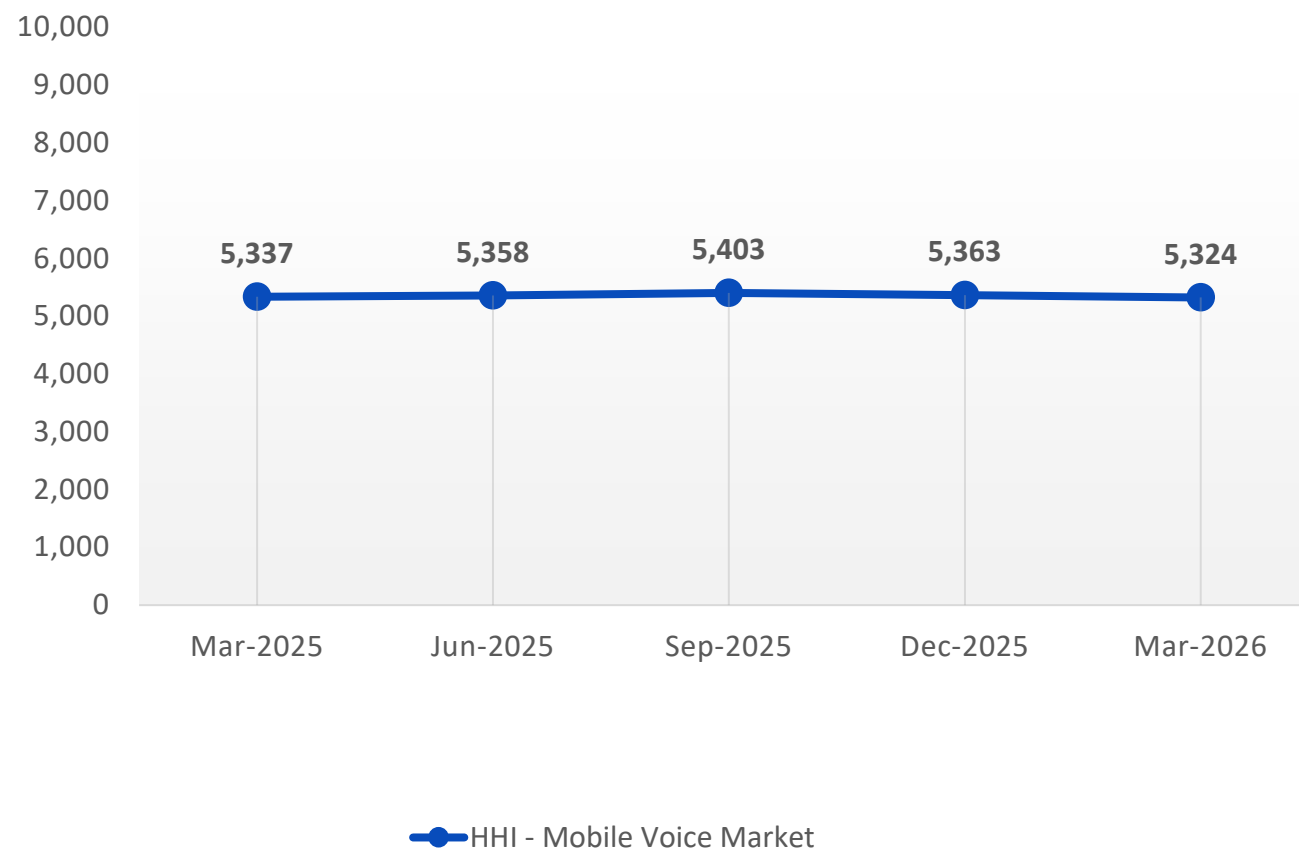
-0.2%



Q-o-Q
PERCENT
CHANGE

-0.7%

HHI for Domestic Mobile Internet Services
from Q1 2025 to Q1 2026

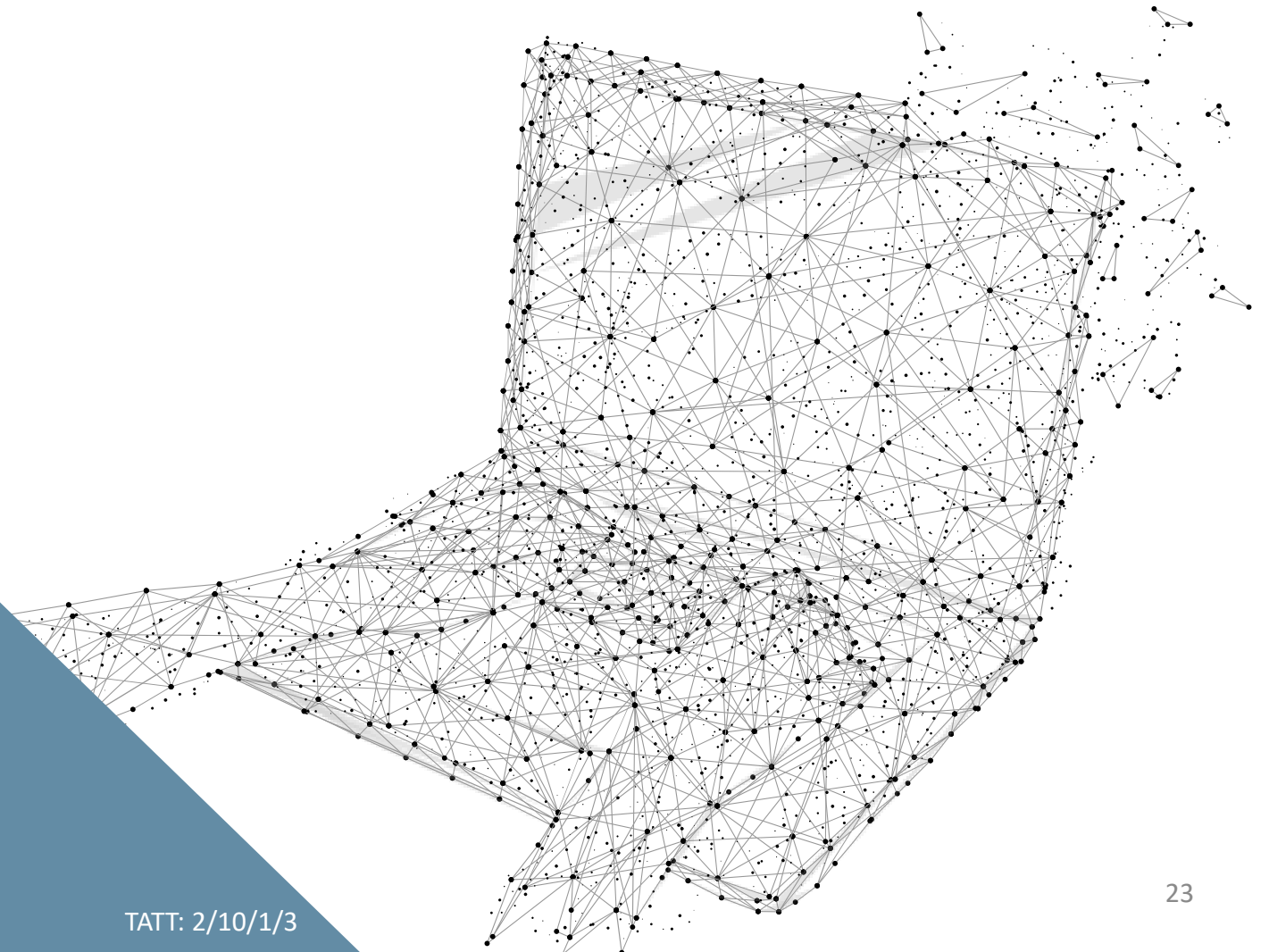


Fixed Internet

7/14/2025

TATT: 2/10/1/3

23



Fixed Broadband Subscriptions



TOTAL NUMBER OF
SUBSCRIPTIONS

402,400



Y-o-Y
PERCENT
CHANGE

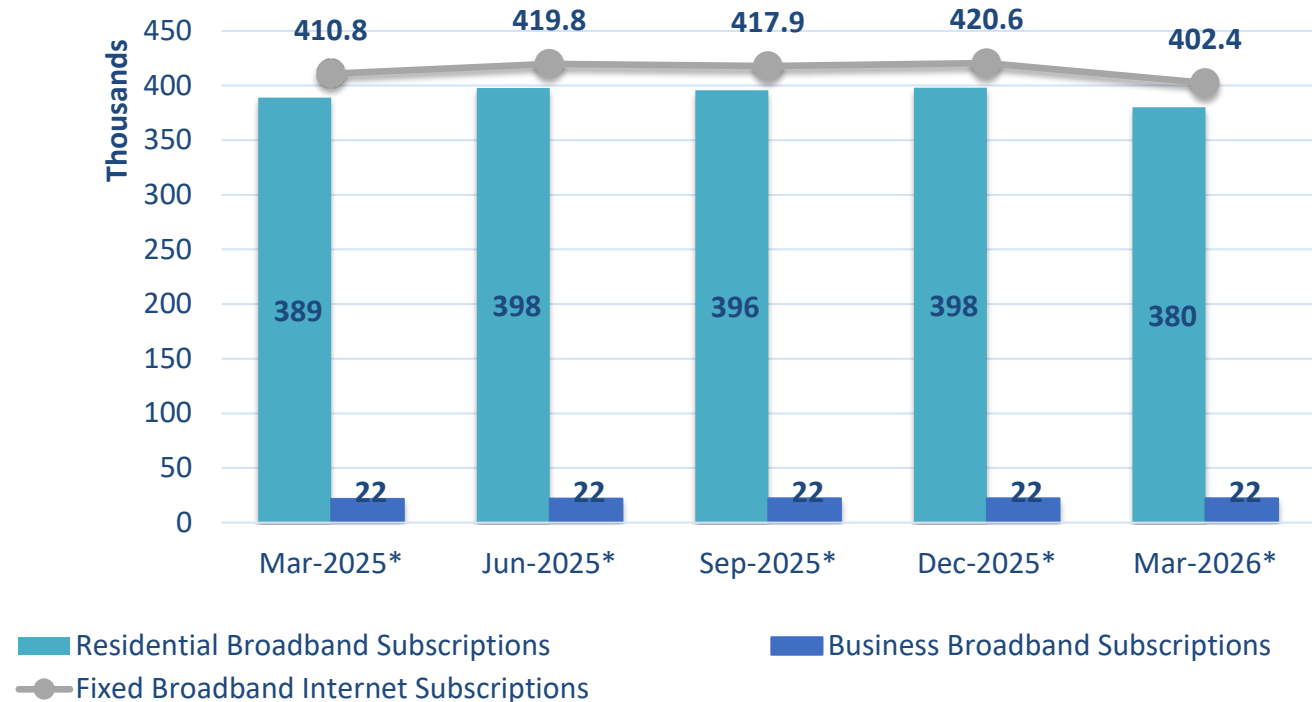
-2.0%



Q-o-Q
PERCENT
CHANGE

-4.3%

Number of Fixed Broadband Internet Subscriptions
from Q1 2025 to Q1 2026



* Data estimated for the following concessionaire who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited

Fixed Internet Penetration



**FIXED INTERNET
PENETRATION
PER 100
INHABITANTS**

29.4



**Y-o-Y
PERCENT
CHANGE**

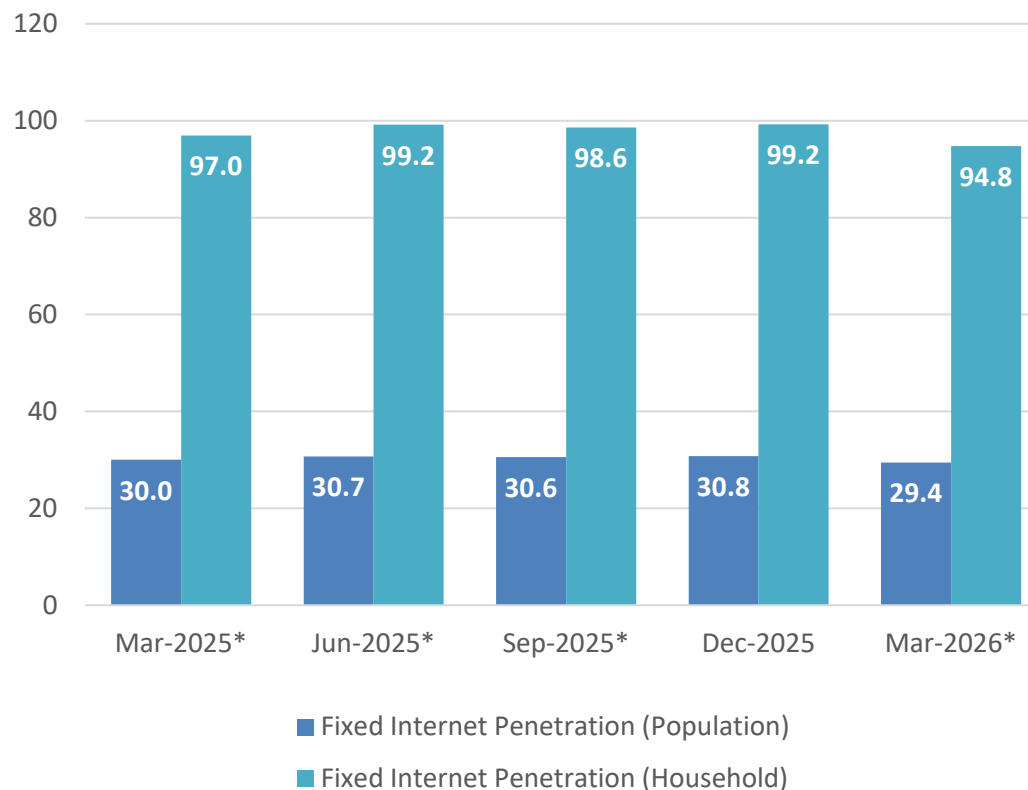
-2.0%



**Q-o-Q
PERCENT
CHANGE**

-4.5%

Penetration for Fixed Internet Subscriptions
from Q1 2025 to Q1 2026



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

94.8



**Y-O-Y
PERCENT
CHANGE**

-2.3%



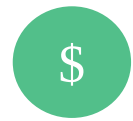
**Q-O-Q
PERCENT
CHANGE**

-4.4%

*Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

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

Fixed Internet Revenues



GROSS
REVENUES
\$ 372.5m

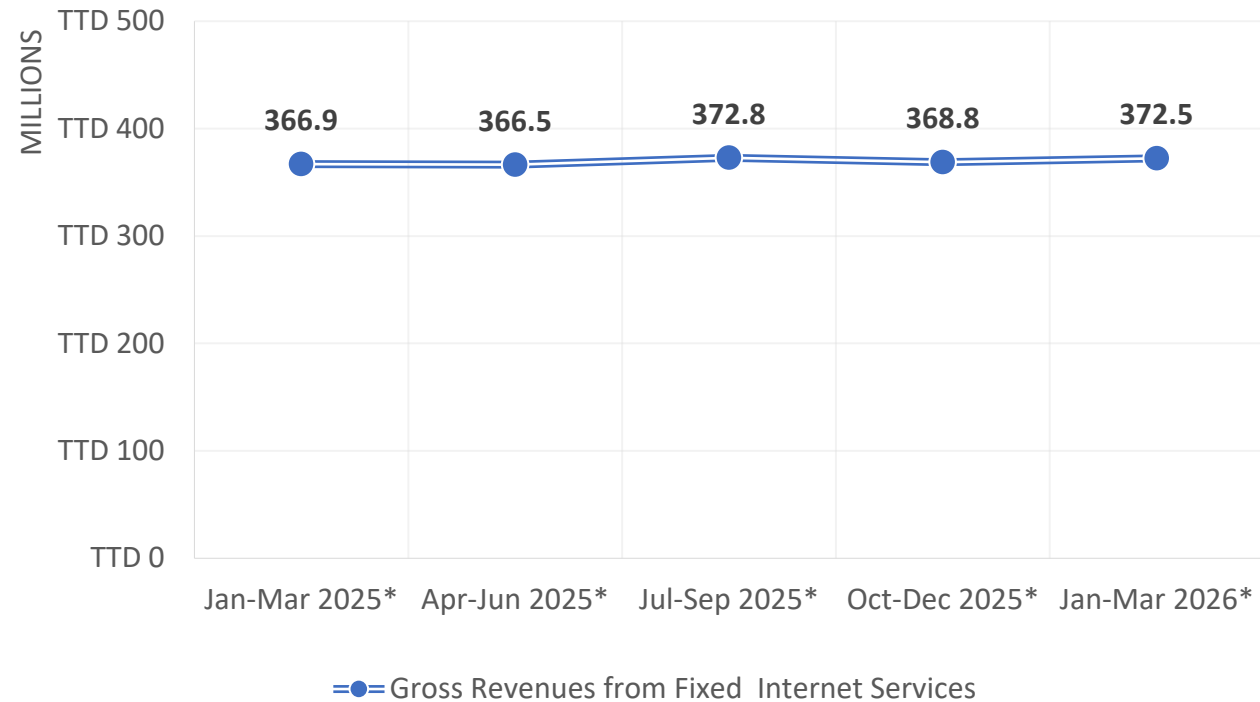


Y-o-Y
PERCENT
CHANGE
1.5%



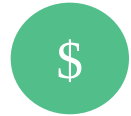
Q-o-Q
PERCENT
CHANGE
1.0%

GROSS REVENUES FROM FIXED INTERNET SERVICES
FROM Q1 2025 TO Q1 2026



** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

Fixed Internet Average Revenue Per User



ARPU
\$843

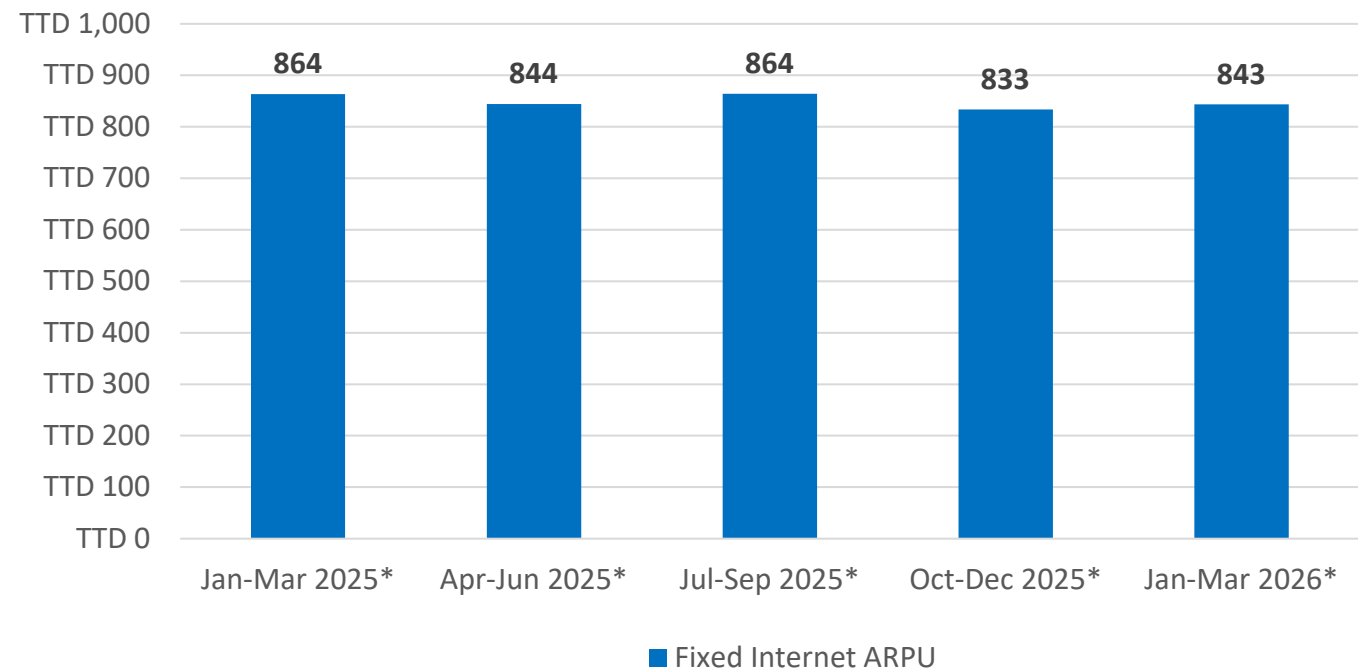


Y-o-Y
PERCENT
CHANGE
-2.4%



Q-o-Q
PERCENT
CHANGE
1.2%

ARPU for Fixed Internet Services
from Q1 2025 to Q1 2026



** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

Fixed Internet HHI



HHI
2,441

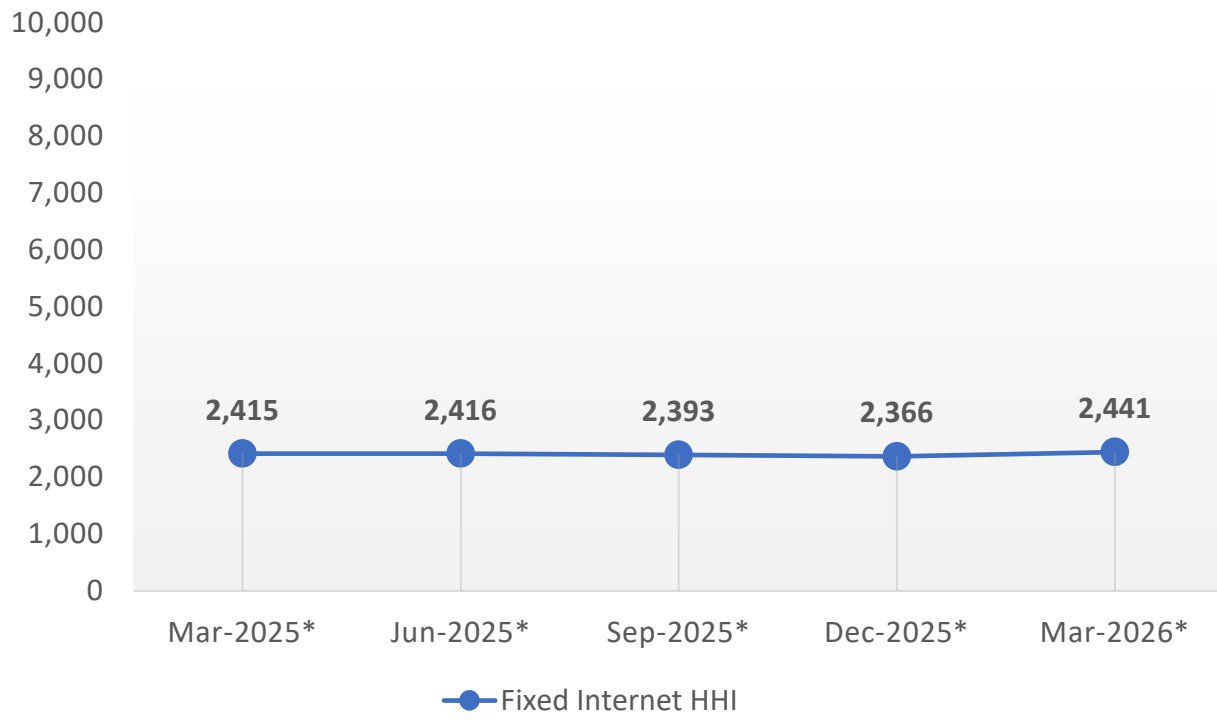


Y-o-Y
PERCENT
CHANGE
1.1%



Q-o-Q
PERCENT
CHANGE
3.2%

HHI for Fixed Internet Services
from Q1 2025 to Q1 2026



** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

Subscription TV



Subscription TV



TOTAL NUMBER
OF
SUBSCRIPTIONS

185,000



Y-o-Y
PERCENT
CHANGE

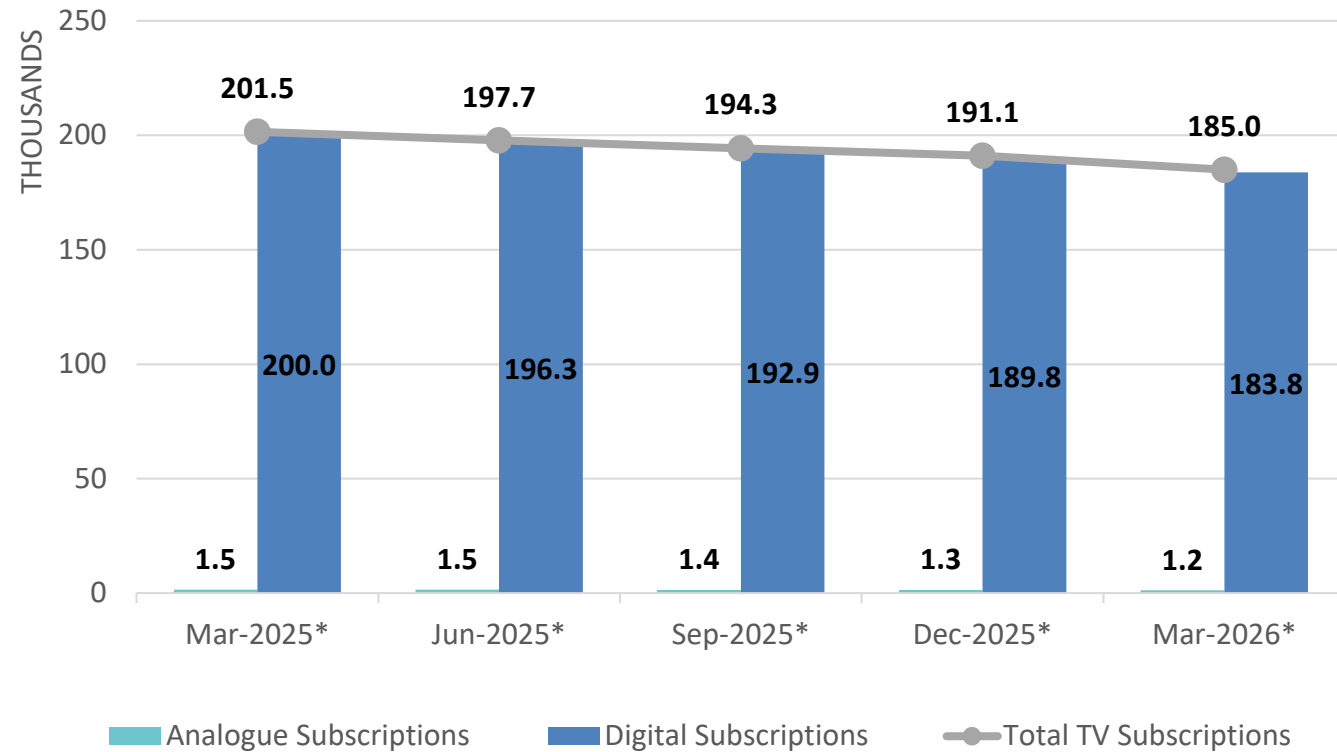
-8.2%



Q-o-Q
PERCENT
CHANGE

-3.2%

Number of Subscription TV Subscriptions
from Q1 2025 to Q1 2026



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:
Q1 2025 – Q1 2026: Greendot Limited

Subscription TV Penetration

SUBSCRIPTION TV
PENETRATION PER
100 INHABITANTS

13.4

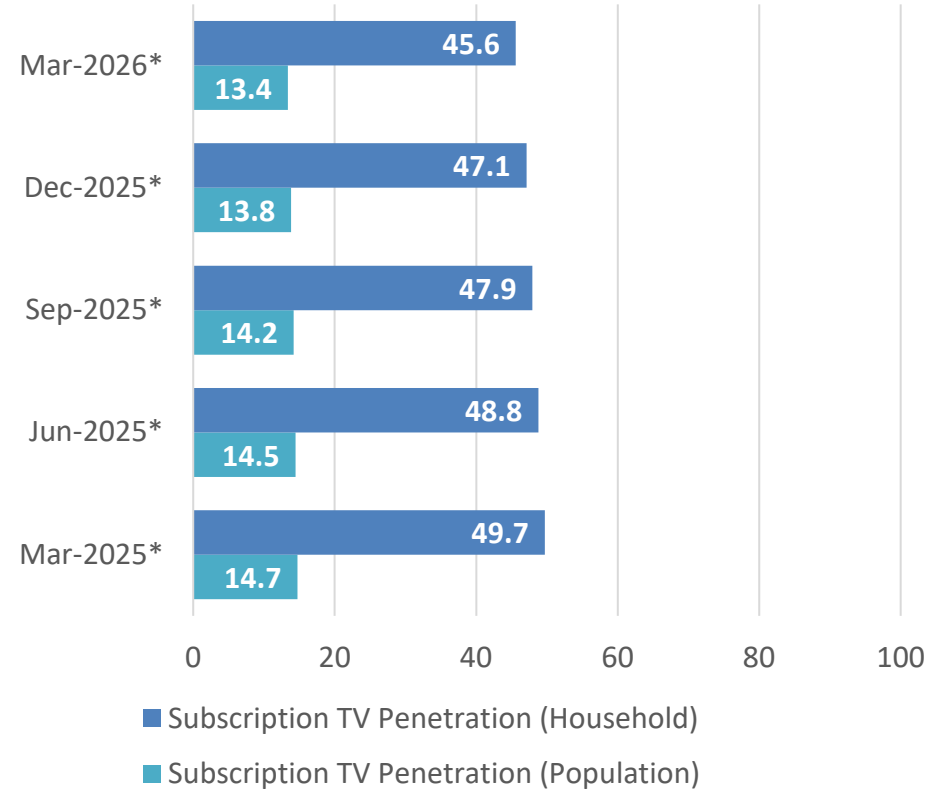
Y-o-Y
PERCENT
CHANGE

-8.8%

Q-o-Q
PERCENT
CHANGE

-2.9%

Penetration Rates of Pay TV Services
from Q1 2025 to Q1 2026



SUBSCRIPTION TV
PENETRATION PER
100 HOUSEHOLDS

45.6

Y-o-Y
PERCENT
CHANGE

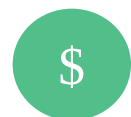
-8.2%

Q-o-Q
PERCENT
CHANGE

-3.2%

* Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited

Subscription TV Revenues



GROSS
REVENUES

\$137m



Y-o-Y
PERCENT
CHANGE

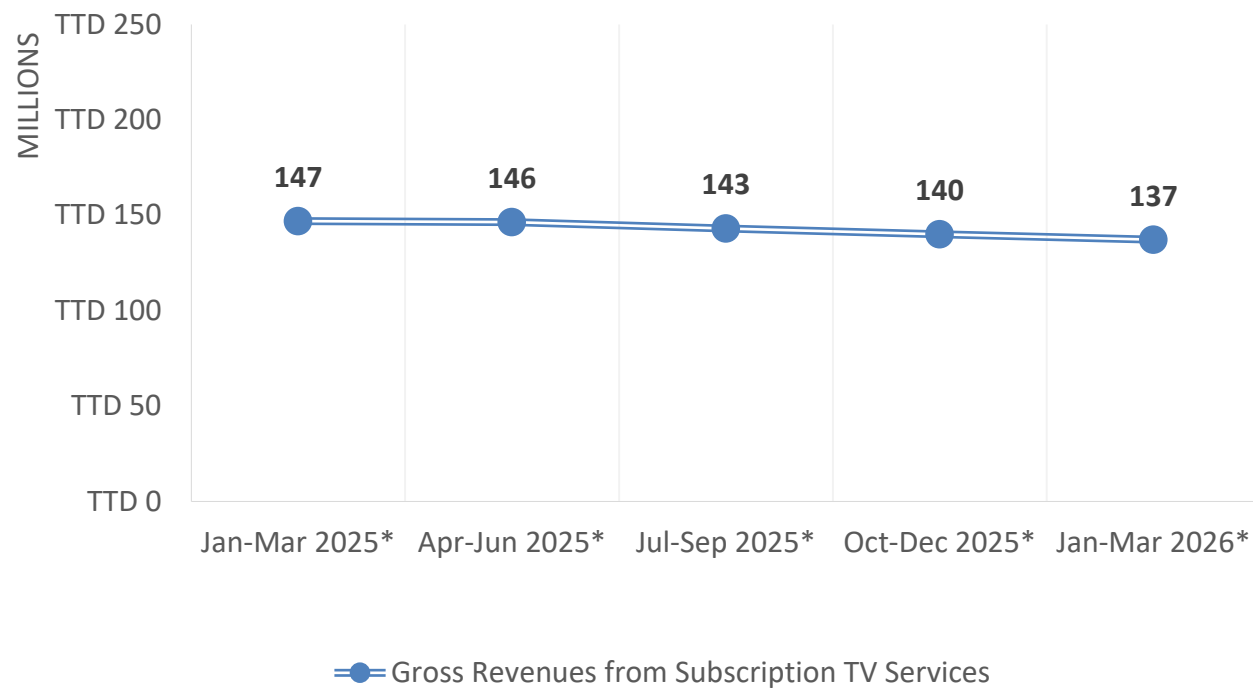
-6.8%



Q-o-Q
PERCENT
CHANGE

-2.1%

GROSS REVENUES FROM SUBSCRIPTION TV SERVICES
FROM Q1 2025 TO Q1 2026



** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

Subscription TV

Average Revenue Per User

ARPU

\$ **\$736**

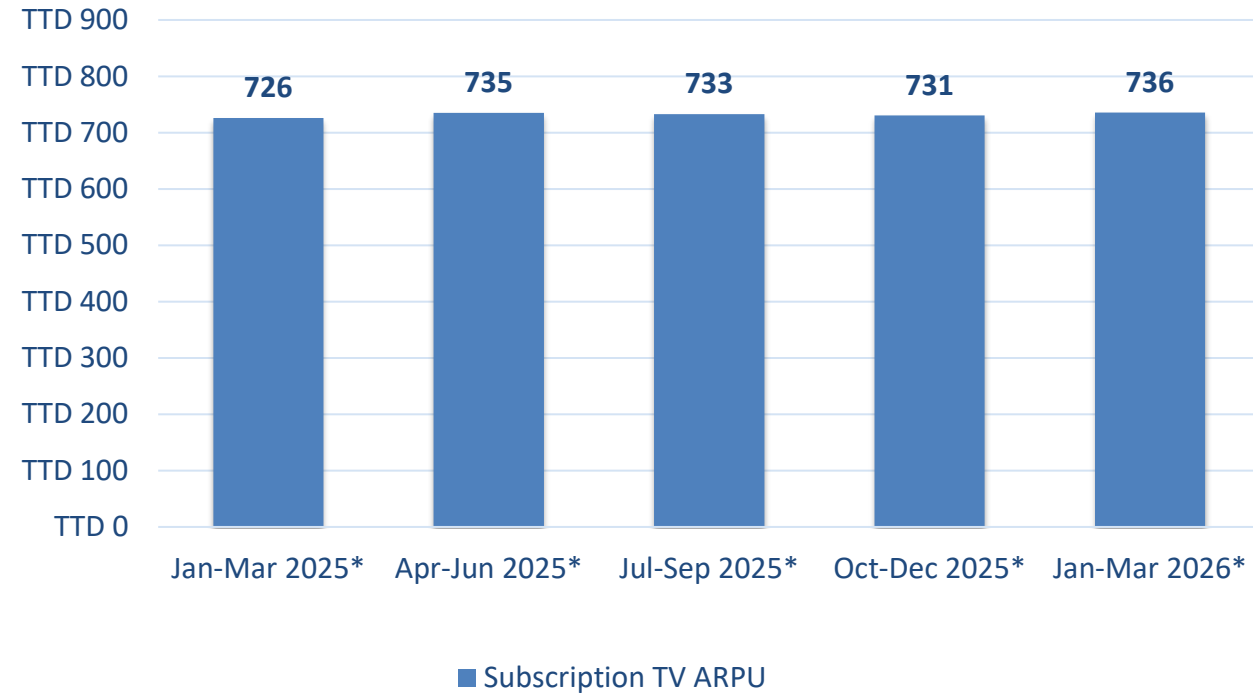
Y-o-Y
PERCENT
CHANGE

1.4%

Q-o-Q
PERCENT
CHANGE

0.7%

ARPU for Subscription TV Services
from Q1 2025 to Q1 2026



** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

Subscription TV HHI



HHI

3,676



Y-o-Y
PERCENT
CHANGE

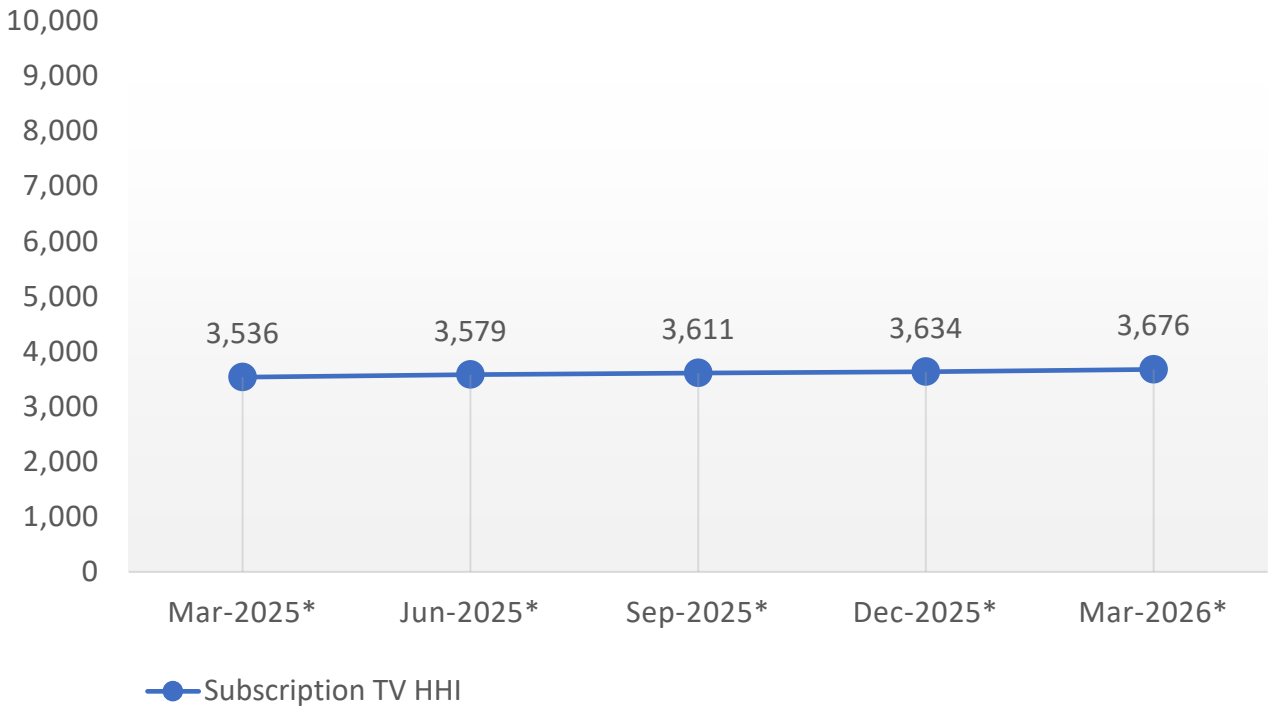
4.0%



Q-o-Q
PERCENT
CHANGE

1.2%

HHI for Subscription TV Services
from Q1 2025 to Q1 2026

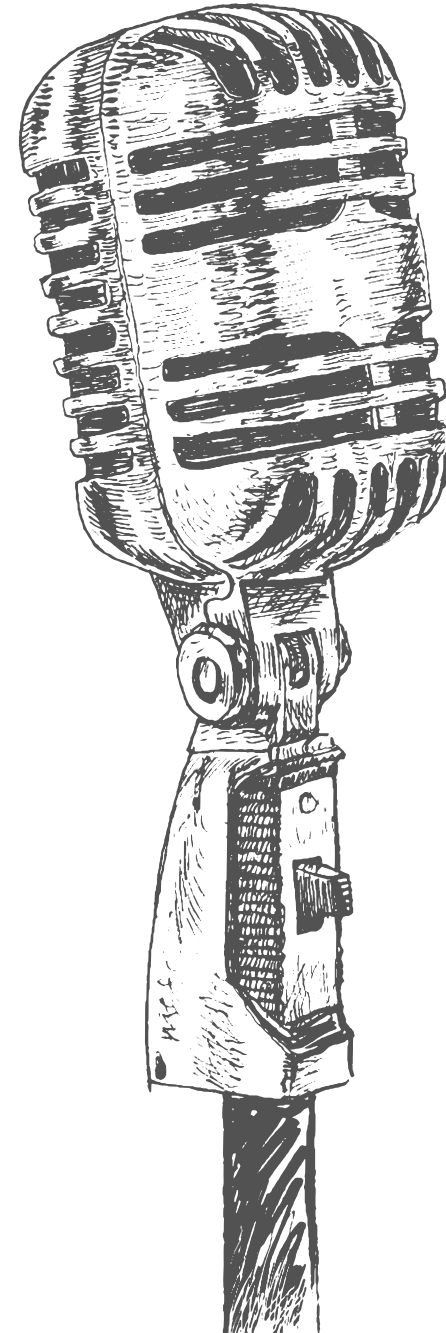


** Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: Greendot Limited*

Free-to-Air Radio

7/14/2026

TATT: 2/10/1/3



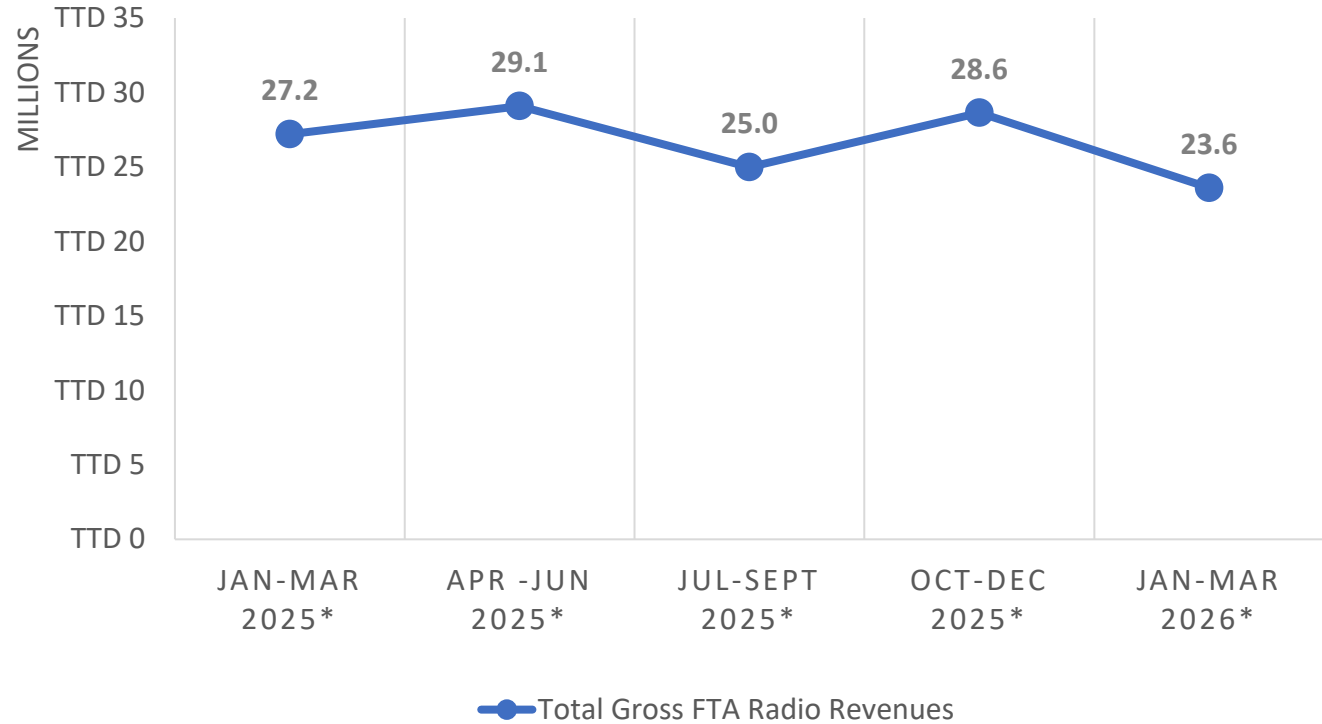
Free-to-Air Radio Revenues

GROSS REVENUES
\$23.6m

Y-o-Y PERCENT CHANGE
-13.2%

Q-o-Q PERCENT CHANGE
-17.5%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES
FROM Q1 2025 TO Q1 2026



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*
Q1 2025-Q1 2026: *Trinidad and Tobago Radio Network (96.1FM, 94.7FM, 107.7FM)*
Q4 2025- Q1 2026: *Scorch Radio (101.1FM)*
Q1 2026: *Upward Trend Entertainment (97.5FM)*

Free-to-Air Radio HHI



HHI
432



Y-o-Y
PERCENT
CHANGE

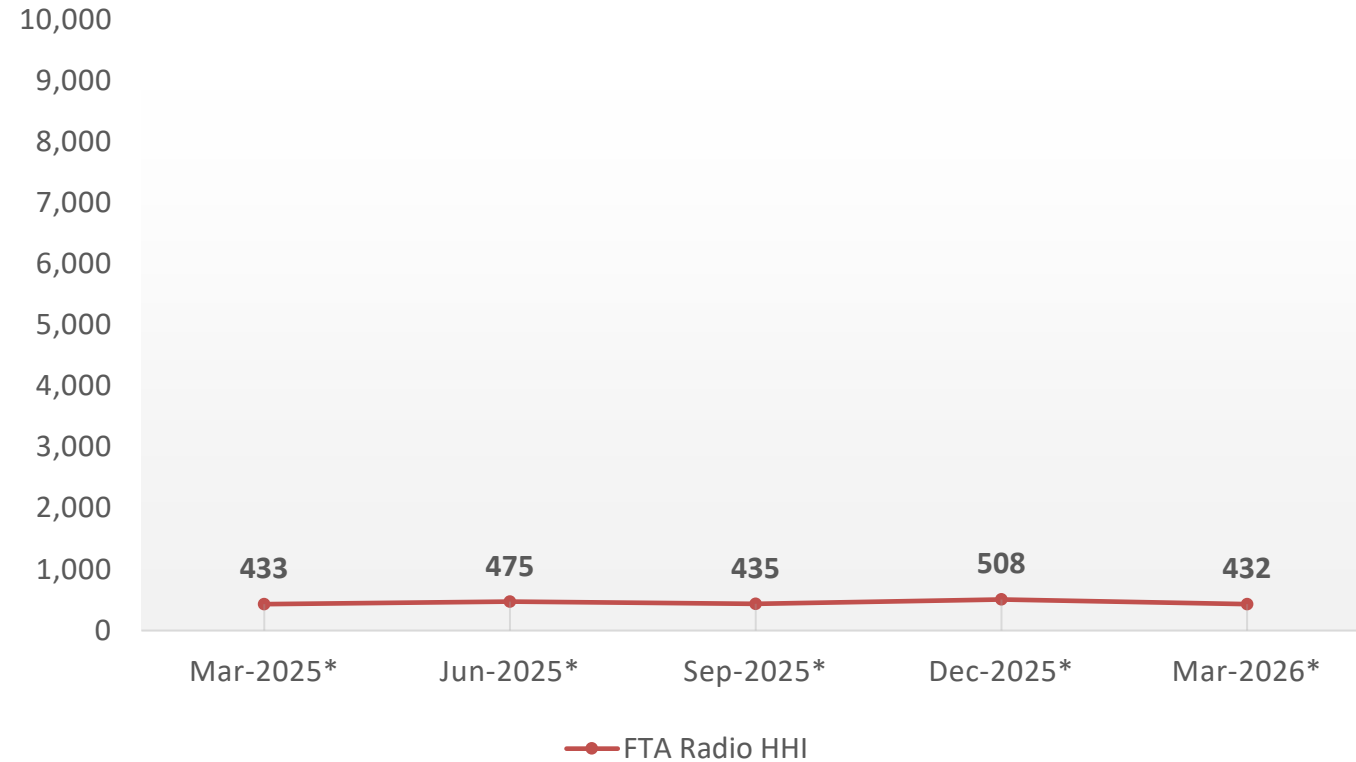
-0.2%



Q-o-Q
PERCENT
CHANGE

-15.0%

HHI for Free to Air Radio Services
from Q1 2025 to Q1 2026

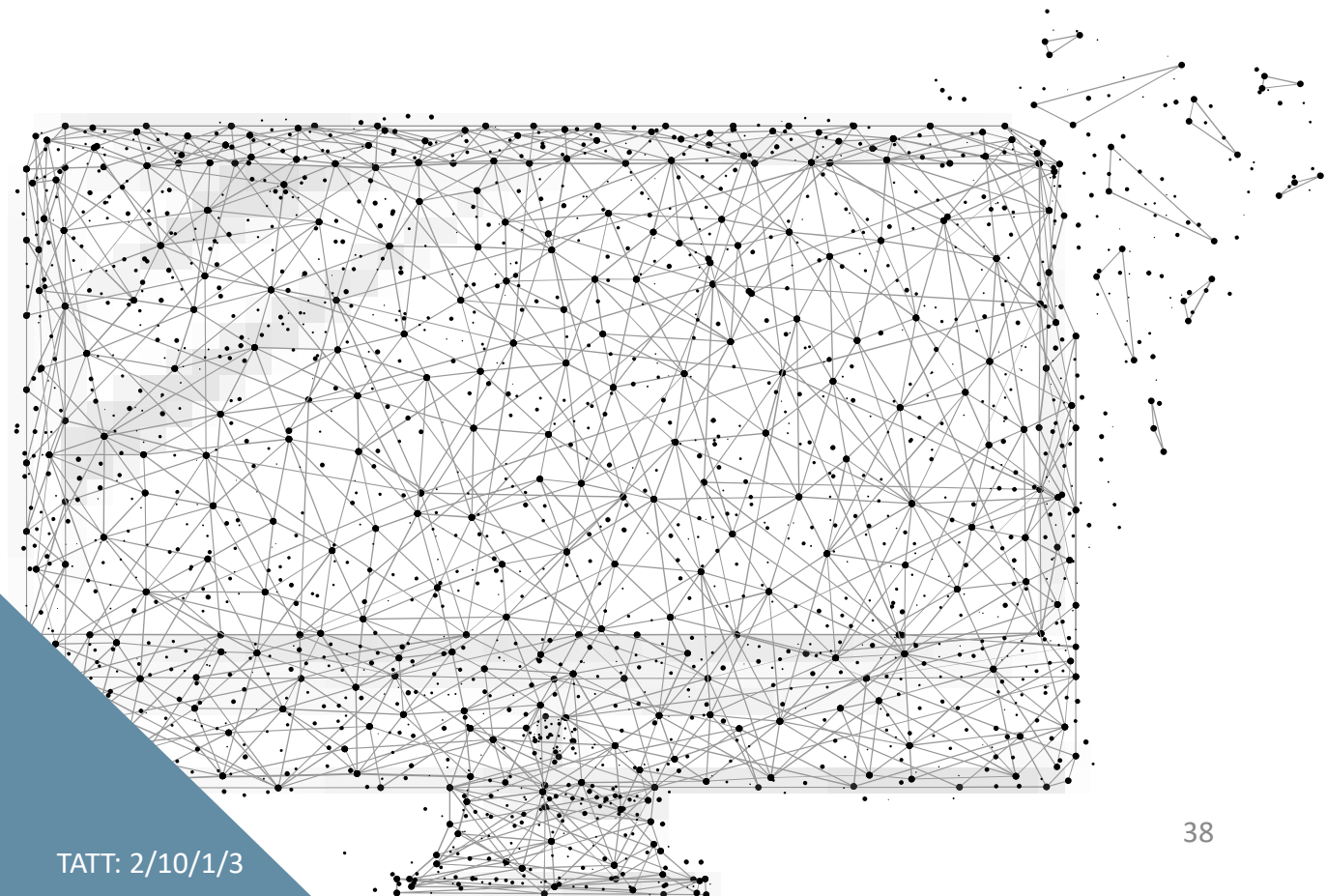


- **Data estimated for the following concessionaires who had not submitted data at the date of publication:**
Q1 2025-Q1 2026: **Trinidad and Tobago Radio Network (96.1FM, 94.7FM, 107.7FM)**
Q4 2025- Q1 2026: **Scorch Radio (101.1FM)**
Q1 2026: **Upward Trend Entertainment (97.5FM)**

Free-to-Air TV

7/14/2026

TATT: 2/10/1/3



Free-to-Air TV Revenues



GROSS
REVENUES

\$5.6m



Y-o-Y
PERCENT
CHANGE

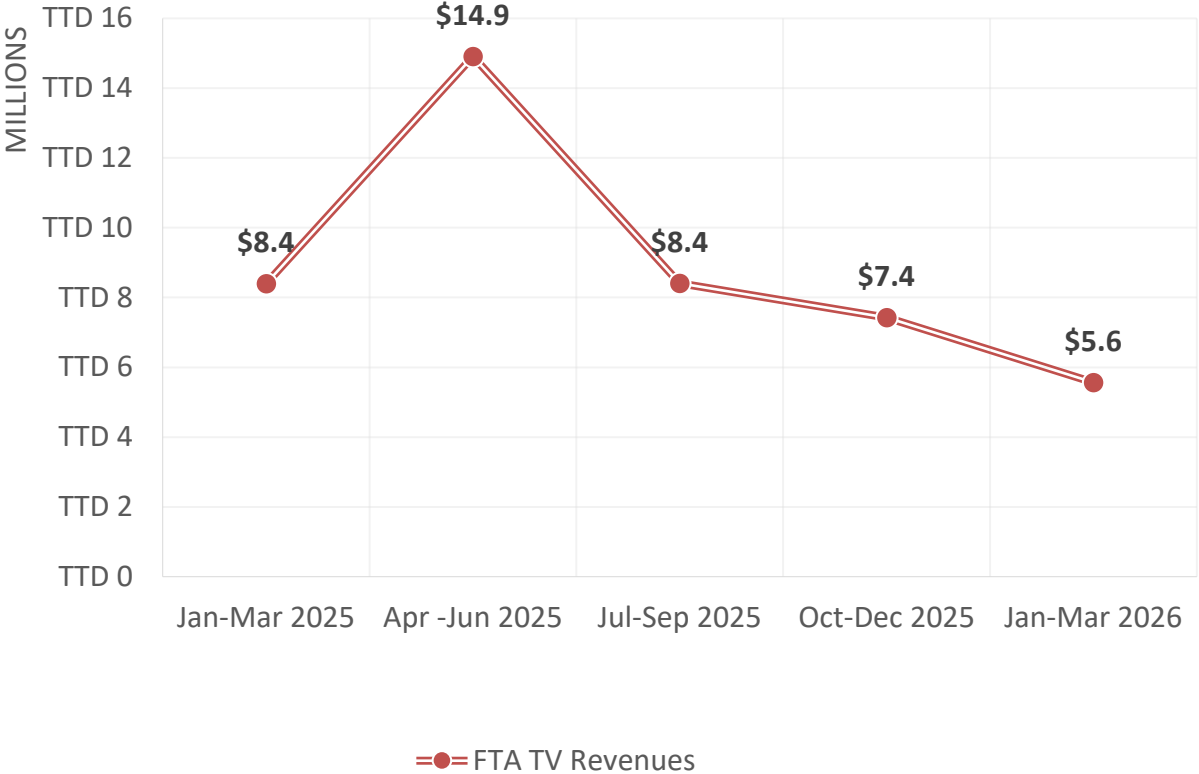
-33.3%



Q-o-Q
PERCENT
CHANGE

-24.3%

GROSS REVENUES FROM FREE TO AIR TV SERVICES
FROM Q1 2025 TO Q1 2026



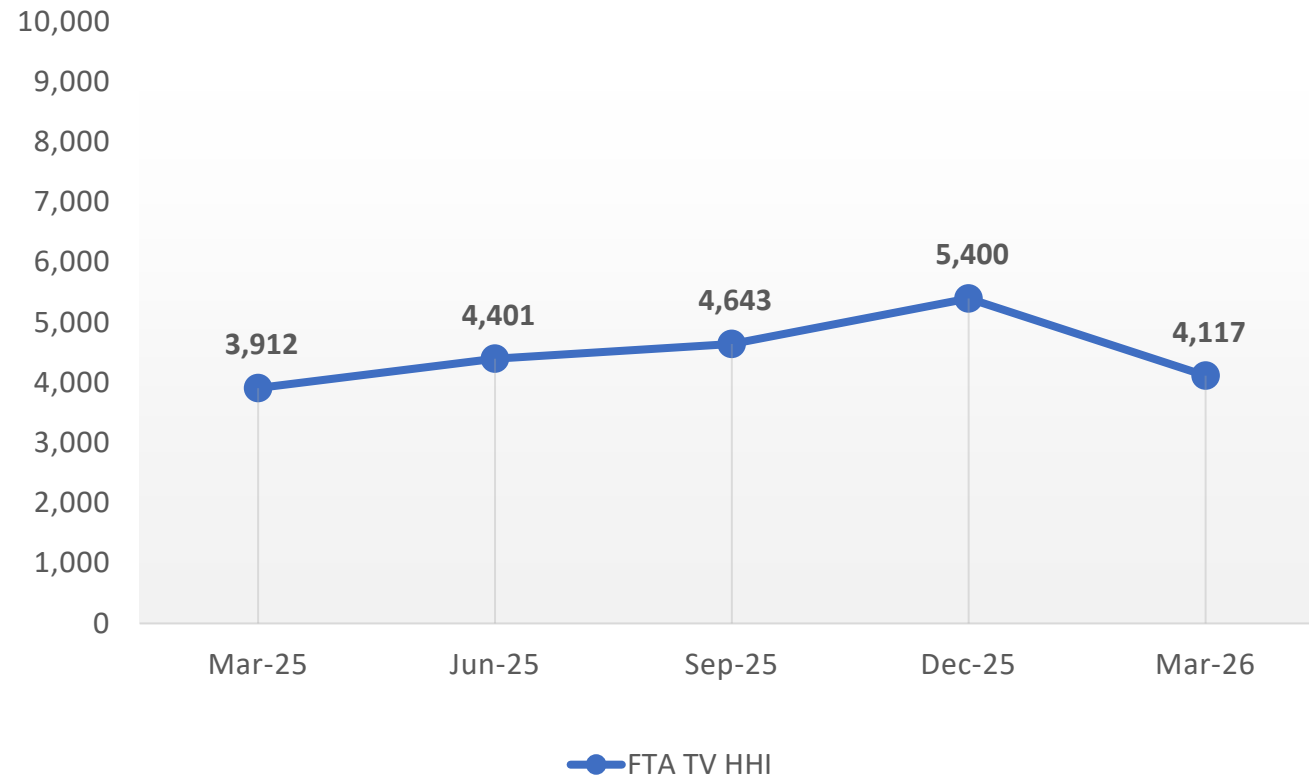
Free-to-Air TV HHI

HHI
4,117

Y-o-Y
PERCENT
CHANGE
5.2%

Q-o-Q
PERCENT
CHANGE
-23.8%

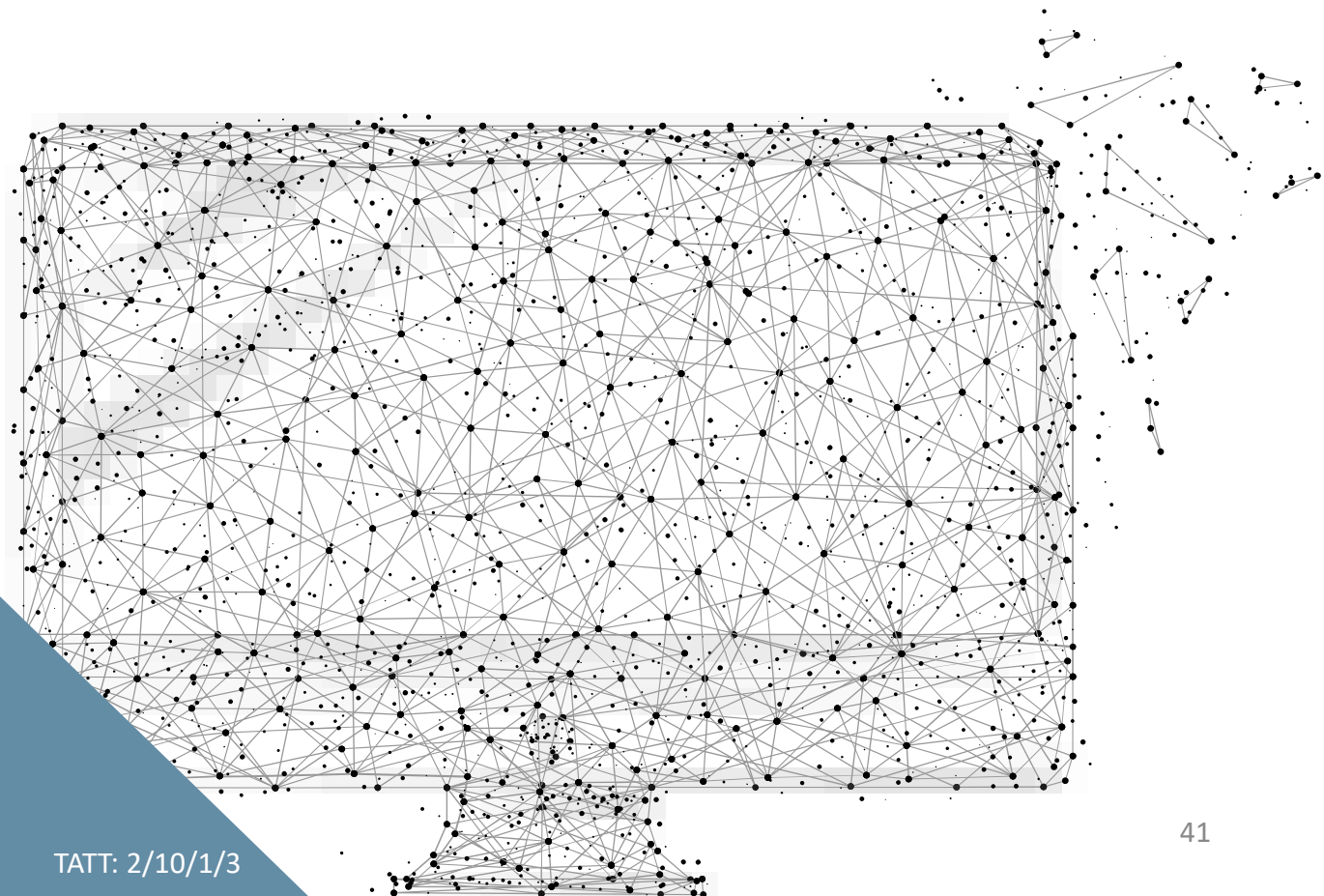
HHI for Free to Air TV Services
Q1 2025 to Q1 2026



Broadcasting Service via Cable TV

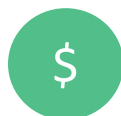
7/14/2026

TATT: 2/10/1/3



41

Broadcasting Service via Cable TV Revenues



GROSS
REVENUES

\$1.1m

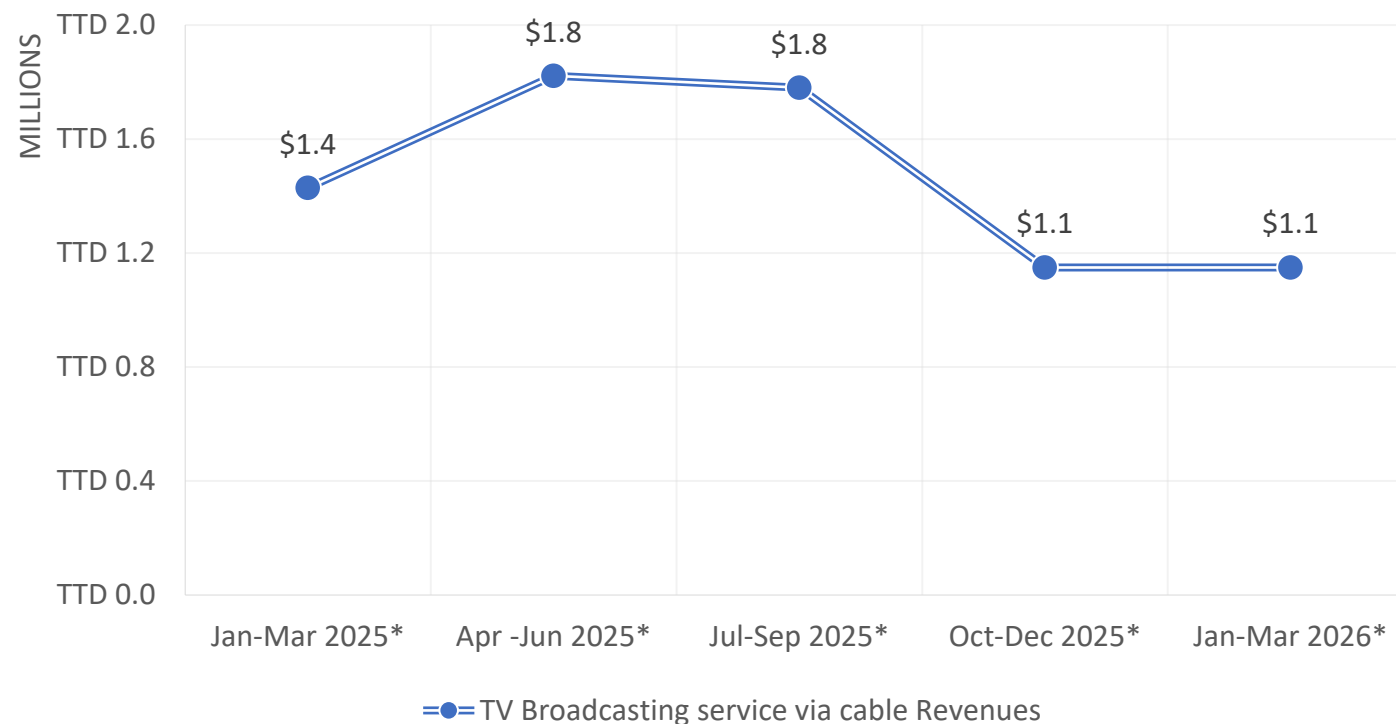
Y-o-Y
PERCENT
CHANGE

0%

Q-o-Q
PERCENT
CHANGE

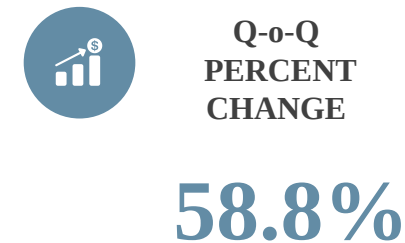
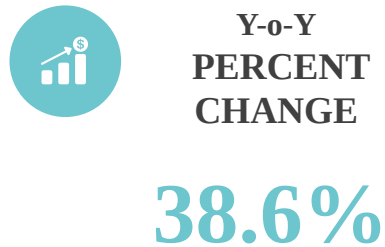
0%

GROSS REVENUES BROADCASTING SERVICE VIA CABLE
FROM Q1 2025 TO Q1 2026

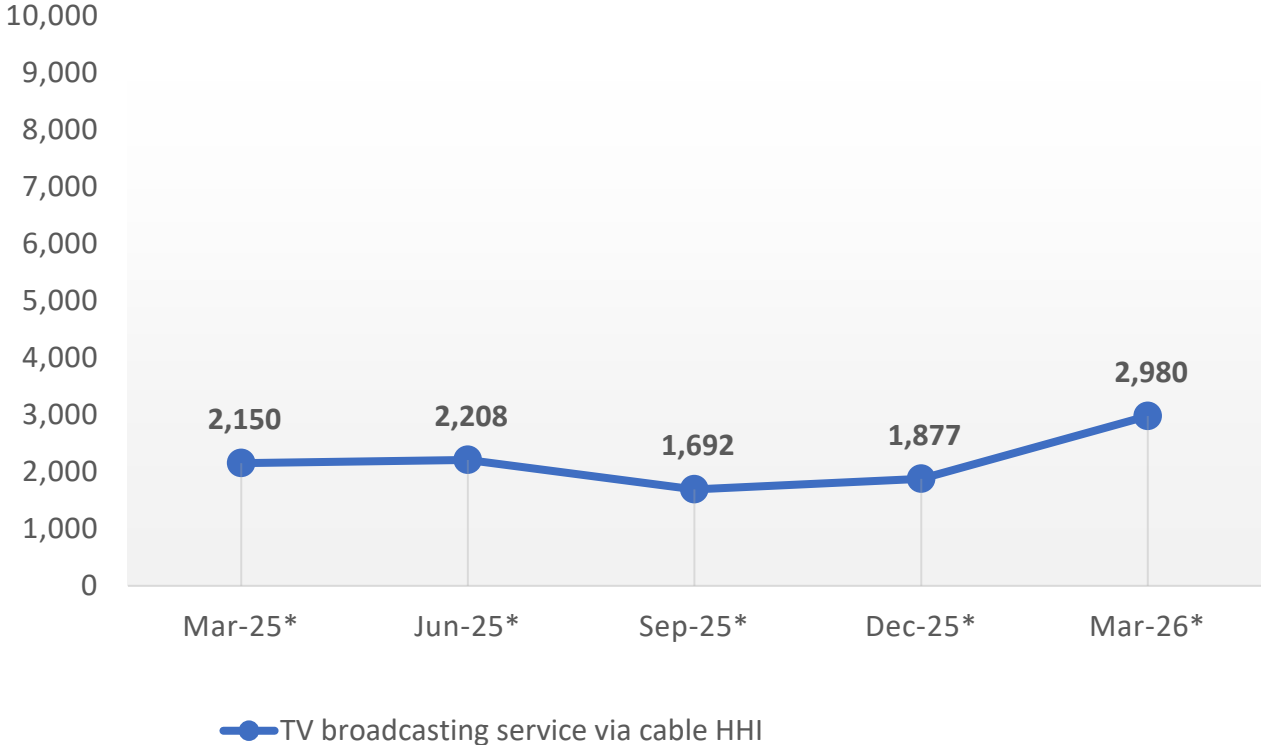


- Data estimated for the following concessionaires who had not submitted data at the date of publication:
Q1 2025 – Q1 2026: WI Sports

Broadcasting Service via Cable HHI



HHI for Broadcasting Service via Cable
Q1 2025 to Q1 2026



- *Data estimated for the following concessionaires who had not submitted data at the date of publication:*
Q1 2025 – Q1 2026: WI Sports

QUARTERLY MARKET UPDATE

January to March 2026

