

# Digital TV Latin America 2016

## Table of Contents

Published in March 2016, this 208-page electronically-delivered report contains forecasts for 19 countries. The fifth edition of this report comes in two parts:

- A 124-page PDF file providing punchy narrative and succinct analysis in the Executive Summary, a new chapter for Major Pay TV operators and a digital TV briefing for each of the 20 countries listed below.
- An excel workbook providing detailed forecasts from 2010 to 2021 for 19 countries as well as handy comparative tables for the region (*please see next page for line-by-line detail of what is included in the forecasts for each country*).

### Table of contents:

Executive summary	Summary forecasts
Major pay TV operators	Argentina
Bolivia	Brazil
Chile	Colombia
Costa Rica	Cuba*
Dominican Republic	Ecuador
El Salvador	Guatemala
Honduras	Mexico
Nicaragua	Panama
Paraguay	Peru
Puerto Rico	Uruguay
Venezuela	

*\*No forecasts for Cuba*

**Forecasts (2010-2021) contain the following detail  
for 19 countries:**

<b>Argentina digital TV forecasts</b>												
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Households (000)												
TV households (000)												
Digital cable subs (000)												
Analog cable subs (000)												
Pay IPTV subscribers (000)												
Pay digital satellite TV subs (000)												
Digital free satellite TV homes (000)												
Analog satellite TV households (000)												
Analog terrestrial households (000)												
Primary FTA DTT households (000)												
Primary Pay DTT households (000)												
Digital homes (000)												
Analog homes (000)												
Pay TV subscribers (000)												
Total DTT homes (000)												
<i>Digital cable subs/TV HH</i>												
<i>Analog cable subs/TV HH</i>												
<i>Pay IPTV subs/TV HH</i>												
<i>Pay satellite TV/TV HH</i>												
<i>Digital free satellite TV/TV HH</i>												
<i>Analog satellite TV/TV HH</i>												
<i>Analog terrestrial/TVHH</i>												
<i>Primary FTA DTT/TV HH</i>												
<i>Primary pay DTT/TV HH</i>												
<i>TVHH/HH</i>												
<i>Digital/TV HH</i>												
<i>Analog/TV HH</i>												
<i>Pay TV Subs/TV HH</i>												
<i>Total DTT/TVHH</i>												
<i>Stand-alone digital cable subs (000)</i>												
<i>Dual-play digital cable subs (000)</i>												
<i>Triple-play digital cable subs (000)</i>												
<i>Stand-alone pay IPTV subs (000)</i>												
<i>Dual-play pay IPTV subs (000)</i>												
<i>Triple-play pay IPTV subs (000)</i>												

## Argentina digital TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Revenues (US\$ million)												
<b>Stand-alone digital cable revs</b>												
<b>Dual-play digital cable TV revenues</b>												
<b>Triple-play digital cable TV revenues</b>												
<b>Digital cable TV subs revenues</b>												
<b>Digital cable TV on-demand revs</b>												
<b>Digital cable TV revenues</b>												
<b>Analog cable TV subs revs</b>												
<b>Cable TV revenues</b>												
<b>Stand-alone IPTV revenues</b>												
<b>Dual-play IPTV revenues</b>												
<b>Triple-play IPTV revenues</b>												
<b>IPTV subscription revenues</b>												
<b>IPTV on-demand revenues</b>												
<b>IPTV revenues</b>												
<b>Satellite TV subscription revenues</b>												
<b>Satellite TV on-demand revenues</b>												
<b>Satellite TV revenues</b>												
<b>DTT subscription revs</b>												
<b>DTT on-demand revenues</b>												
<b>DTT revenues</b>												
<b>Subscription revenues</b>												
<b>On-demand revenues</b>												
<b>Total revenues</b>												
Average Revenue Per User (ARPU - US\$)												
<b>Stand-alone digital cable subs</b>												
<b>Dual-play digital cable TV subs</b>												
<b>Triple-play digital cable TV subs</b>												
<b>Average digital cable (subs &amp; VOD)</b>												
<b>Analog cable TV subs</b>												
<b>Stand-alone IPTV subs</b>												
<b>Dual-play IPTV subs</b>												
<b>Triple-play IPTV subs</b>												
<b>Average IPTV (subs and VOD)</b>												
<b>Pay satellite TV (subs)</b>												
<b>Pay satellite TV (subs and PPV)</b>												
<b>Pay DTT (subs)</b>												
<b>Pay DTT (subs and PPV)</b>												
<b>Average monthly ARPU</b>												
<i>Source: digital TV research Ltd.</i>												



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<a href="#">Digital TV Eastern Europe Forecasts</a>	April	£900/\$1350/€1125
<a href="#">Digital TV Western Europe Forecasts</a>	April	£900/\$1350/€1125
<a href="#">Digital TV World Household Forecasts</a>	May	£1300/\$1950/€1625
<a href="#">Digital TV World Revenue Forecasts</a>	May	£1300/\$1950/€1625
<a href="#">Global Satellite TV Forecasts</a>	May	£1250/\$1875/€1562
<a href="#">Digital TV World Databook</a>	June	£800/\$1200/€1000
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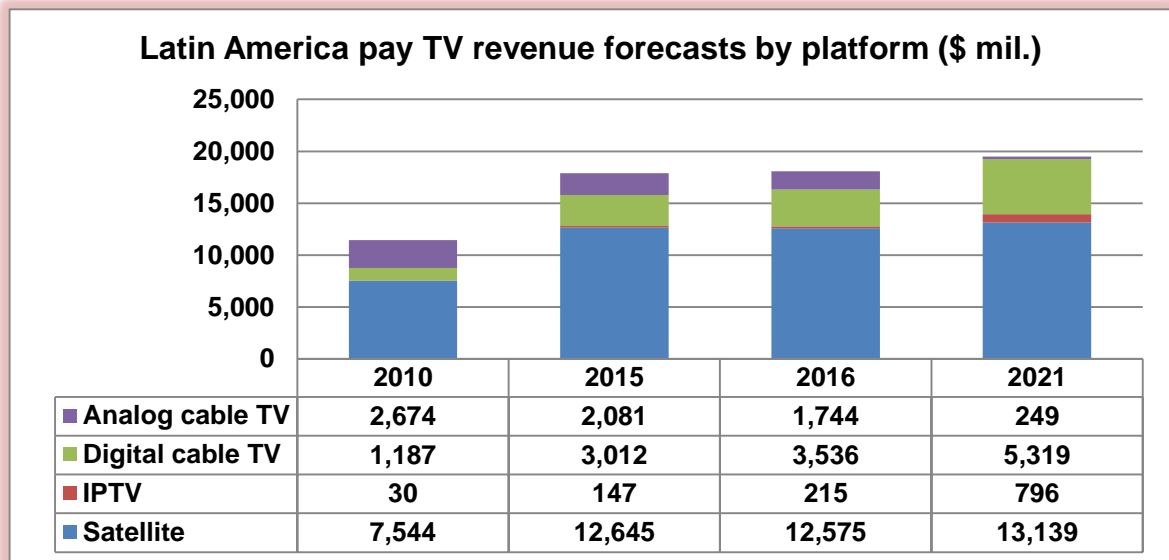
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## Sluggish pay TV growth expected in Latin America

Pay TV revenues [subscriptions and PPV] in Latin America will grow by only 9% (or up by \$1.6 billion) between 2015 and 2021, according to the fifth edition of the [Digital TV Latin America Forecasts](#) report. Economic woes are one reason for this slowdown, but market maturity is another.



*Source: Digital TV Research Ltd.*

Satellite TV will continue to be the largest pay TV platform, with revenues reaching \$13.1 billion in 2021, up from \$12.6 billion in 2015. Cable TV revenues will be \$5.6 billion in 2021, up from \$5.1 billion in 2015.

Simon Murray, Principal Analyst at Digital TV Research, said: “Digital cable TV revenues overtook analog cable in 2014 and IPTV will pass analog cable by 2020. IPTV revenues will grow by the same amount as satellite TV and cable TV over this period.”

Brazil (\$7.3 billion in 2021) will remain the top country by pay TV revenues by some distance, followed by Mexico (\$3.4 billion) and Argentina (\$2.2 billion). These three will collectively take two-thirds of the total for the 19 countries covered in the report. However, revenues will fall in Brazil, Puerto Rico and Venezuela.

Pay TV penetration will reach 50.6% by 2021, up from 45.0% at end-2015 and 28.7% at end-2010. This means 14 million more pay TV homes between 2015 and 2021; taking the total to 82 million. This compares to more than 27 million pay TV subscriber additions between 2010 and 2015.

Brazil will provide 4.7 million of the additions between 2015 and 2021 and Mexico 3.7 million. However, Brazil added 9.6 million new pay TV subscribers between 2010 and 2015, with Mexico bringing in a further 7.1 million.

Puerto Rico will record 83% pay TV penetration by 2021, with four more countries [Argentina, Honduras, Panama and Venezuela] above 70%. However, five countries [Brazil, Dominican Republic, El Salvador, Guatemala and Peru] will be below 40%.

Extracting analog cable, the number of digital pay TV subscribers will rocket from 19.5 million in 2010 (13.7% penetration) to 52.3 million in 2015 (34.6%) to 80.9 million in 2021 (49.8%).

For more information [on the fifth edition of the Digital TV Latin America Forecasts report](#), please contact: Simon Murray, [simon@digitaltvresearch.com](mailto:simon@digitaltvresearch.com),  
Tel: +44 20 8248 5051

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6	Digital TV Eastern Europe Forecasts	April	£900/\$1350/€1125
7	Digital TV Western Europe Forecasts	April	£900/\$1350/€1125
8	Digital TV World Household Forecasts	April	£1300/\$1950/€1625
9	Digital TV World Revenue Forecasts	May	£1300/\$1950/€1625
10	Digital TV World Databook	May	£800/\$1200/€1000
11	Middle East & Africa OTT TV & Video Forecasts	May	£900/\$1350/€1125
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13	Latin America OTT TV & Video Forecasts	June	£900/\$1350/€1125
14	North America OTT TV & Video Forecasts	June	£500/\$750/€625
15	Eastern Europe OTT TV & Video Forecasts	July	£900/\$1350/€1125
16	Western Europe OTT TV & Video Forecasts	July	£900/\$1350/€1125
17	Global OTT TV & Video Forecasts	July	£1500/\$2250/€1875
18	Asia Pacific Pay TV Operator Forecasts	August	£900/\$1350/€1125
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20	Latin America Pay TV Operator Forecasts	August	£900/\$1350/€1125
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