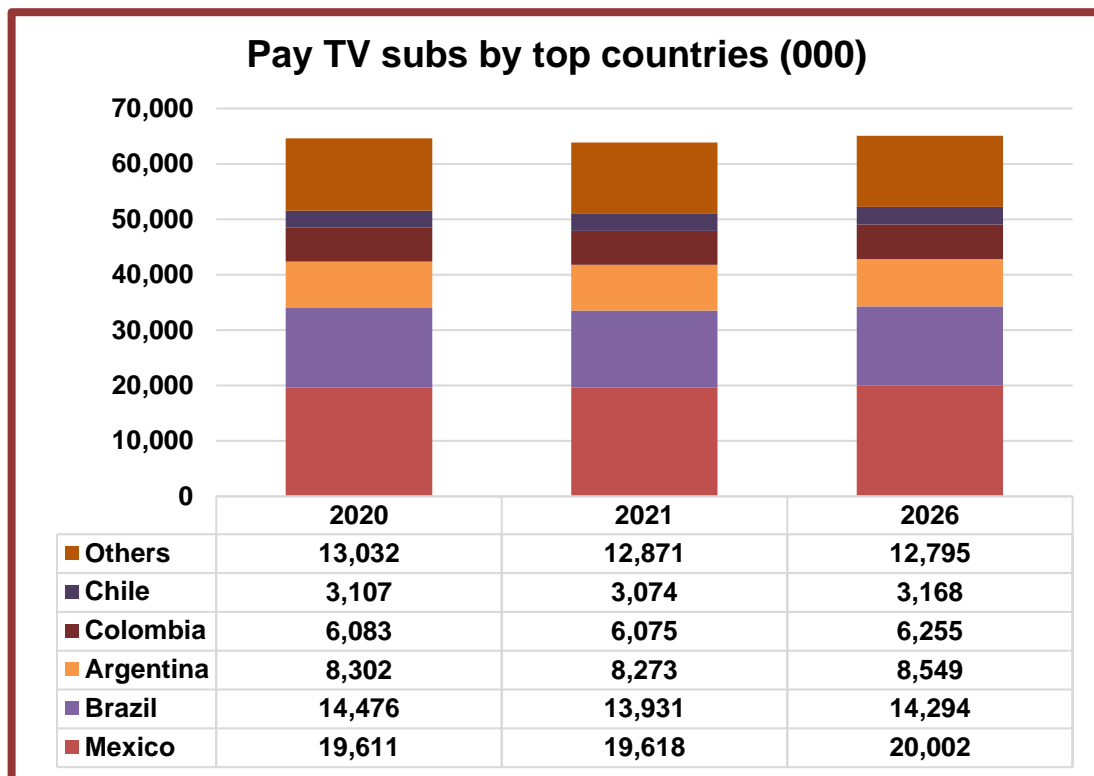


Latin American pay TV to plateau

Poorly-performing economies have hit Latin American pay TV. The number of pay TV subscribers fell by 4 million in both 2019 and 2020. Venezuela dropped 2.4 million subscribers in 2020 alone, mainly due to DirecTV's withdrawal.

Across Latin America, the number of pay TV subscribers peaked at 72.2 million in 2017. The total fell to 64.6 million by 2020. A small improvement is expected after 2023, with the 2026 total at 65.1 million subscribers.



Source: Digital TV Research Ltd

Simon Murray, Principal Analyst at Digital TV Research, said: "Brazil's low point will be 2022, with only a small improvement expected from then. The country peaked in 2014 with 19.6 million subscribers. We forecast 5.3 million fewer subscribers by 2026."

Mexico has more pay TV subscribers than Brazil despite having half as many TV households. Mexico has lost subscribers since its peak year of 2016 [20.9 million]. Mexico will not cross the 20 million subscriber mark again until 2026.

Across the region, digital cable overtook pay satellite TV in 2020. Digital cable will add 2.5 million subscribers between 2020 and 2026 to reach 31 million. Pay satellite TV will lose 3 million subs between 2020 and 2026 to total 25 million.

Latin America Pay TV Forecasts

Table of Contents

Published in March 2021, this 186-page PDF, PowerPoint and excel report comes in three parts:

- Insight: Detailed country-by-country analysis in a 66-page PDF document.
- Outlook: Forecasts for 19 countries in a 42-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2026 for 19 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. As well as summary tables by country and by platform;

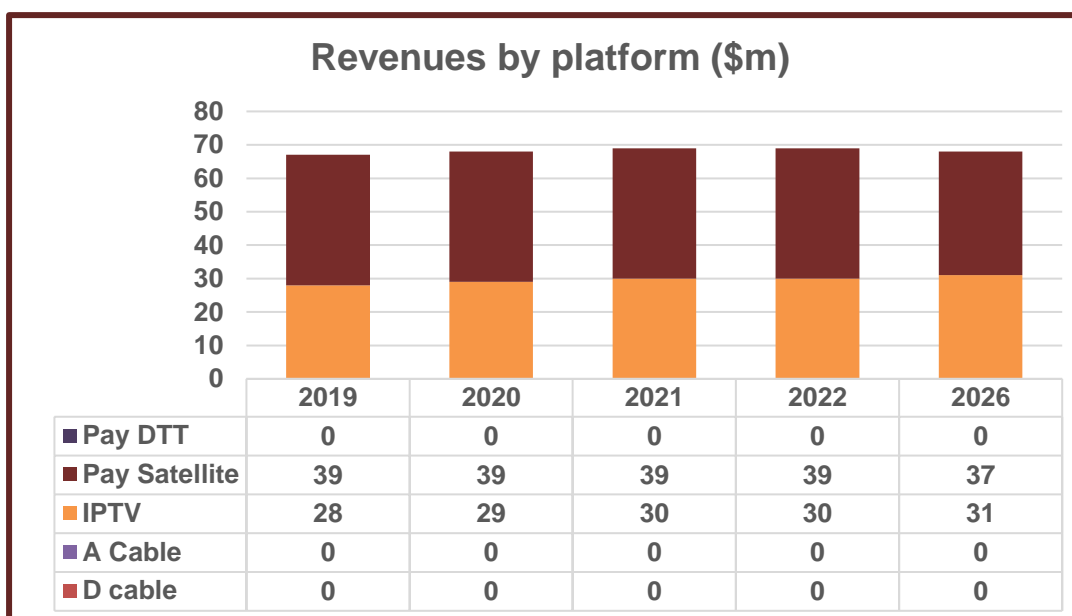
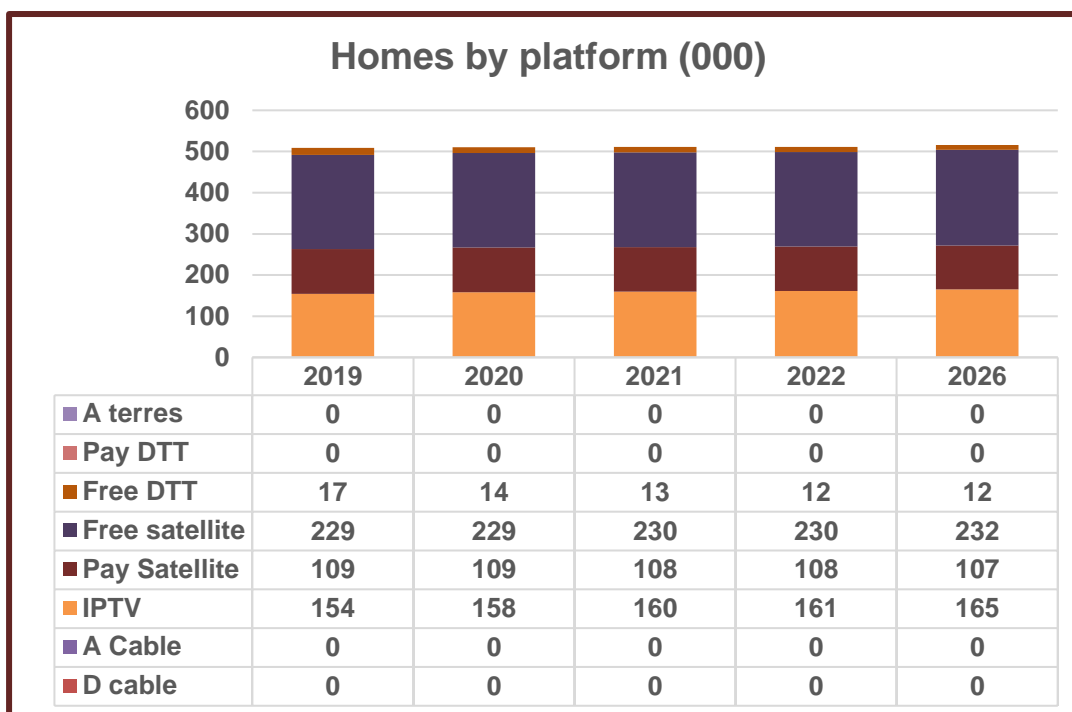
For more information, [please click here](#) or contact lydia@digitaltvresearch.com

Forecasts for the following 19 countries and 69 operators:

Country	No of ops	Platform forecasts
Argentina	5	Cablevision; Supercanal; DirecTV; Telefonica; Claro
Bolivia	2	Tigo; Entel
Brazil	4	Claro; Telefonica/Vivo; Sky; Oi
Chile	6	VTR; Telefonica; Claro; DirecTV; Entel; Telsur
Colombia	5	Claro; UNE; ETB; DirecTV; Movistar
Costa Rica	5	Tigo; Cabletica; Claro; Sky; Telecable
Dominican Rep	3	Tricom; Claro; Sky
Ecuador	4	DirecTV; CNT; Claro; TV Cable
El Salvador	3	Claro; Tigo; Sky
Guatemala	3	Claro; Tigo; Sky
Honduras	3	Claro; Tigo; Sky
Mexico	5	Megacable; Televisa cable; Sky; Dish; TotalPlay
Nicaragua	3	Claro; Sky; Tigo
Panama	4	Claro; Sky; Cable & Wireless; Cable Onda
Paraguay	2	Tigo; Claro
Peru	3	Telefonica; Claro; DirecTV
Puerto Rico	4	Liberty; Claro; DirecTV; Dish
Uruguay	2	Cablevision; DirecTV
Venezuela	3	Intercable; Movistar; CANTV

SAMPLE: Qatar pay TV insight

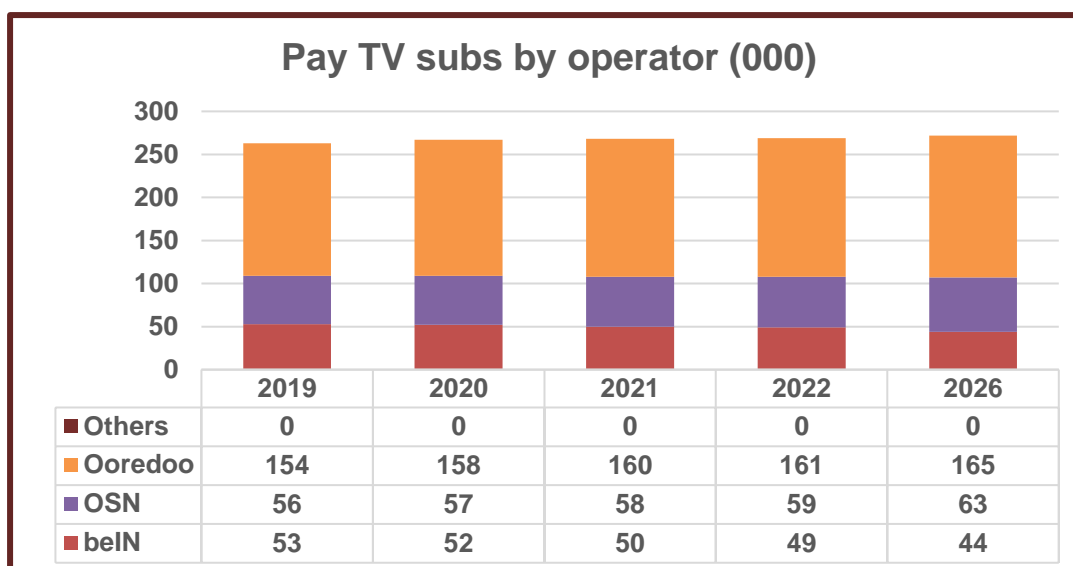
- **Digital TV penetration** reached 100% in 2015. About two-thirds of the 510,000 TV households receive either free-to-air or pay satellite TV signals.



Main assumptions behind the forecasts

- About 45% of homes receive FTA satellite TV signals and 21% pay to receive satellite TV signals.
- IPTV penetration is also high – at 30.9% by end-2020.
- Few homes rely on DTT signals.

Source: Digital TV Research



- **Pay TV penetration** will remain at 52% of TV households. Pay TV revenues will reach \$68 million in 2026.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
beIN	52	-	-	beIN Connect
Ooredoo	158	-	2,970	StarzPlay; OSN; beIN
OSN	57	-	-	OSN
Vodafone	-	5	1,678	-

Source: Digital TV Research

- The ongoing dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. beIN is reliant on subscriptions outside Qatar to thrive. Most governments have followed the Saudi ban on beIN – although not all of them have enforced the ban that effectively. The ban started in mid-2017
- With 52,000 subs in Qatar by end-2020, **beIN** provides up to 67 channels. We forecast that beIN will have 44,000 subscribers by 2026 - falling as fewer sports rights are expected.
- We estimate 57,000 **OSN** subscribers by end-2020, with 63,000 by 2026. After a cost cutting drive and in preparation for an IPO in 2021, OSN is placing more emphasis on its SVOD platform. OSN has exclusive deals with seven Hollywood studios, but wants to increase Arabic content to at least a quarter of the total.
- **The Ooredoo TV IPTV platform** (up to 190 channels, including bundles from beIN, MBC and OSN) is offered as part of a triple-play package (up to 1Gbps). We estimated 158,000 subscribers at end-2020; climbing to 165,000 by 2026. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and StarzPlay (QAR30/month, 8,000 hours).

- Ooredoo is investing QAR1 billion on an **extensive fiber network** (up to 100Mbps). Ooredoo is responsible for constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.97 million mobile subscribers by September 2020.
- **Vodafone** won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Vodafone started its Giga TV OTT platform in late 2019. Vodafone had 5,000 fixed broadband and 1.68 million mobile subscribers by September 2020.
- State-owned **Qatar Media Corporation**, owner of Al Jazeera and FTA channel Qatar TV, had upgraded the terrestrial network to DVB-T2 by December 2013. Full conversion took place in 2014.

Qatar pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total households (000)																	
TV households (000)																	
Digital cable subs (000)																	
Analog cable subs (000)																	
Pay IPTV subscribers (000)																	
Pay Satellite TV subs (000)																	
Free-to-air Satellite TV HH (000)																	
Analog terrestrial hholds (000)																	
Primary FTA DTT hholds (000)																	
Primary Pay DTT hholds (000)																	
Digital homes (000)																	
Analog homes (000)																	
Pay TV subscribers (000)																	
Digital cable subs/TV HH																	
Analog cable subs/TV HH																	
Pay IPTV subs/TV HH																	
Pay Satellite TV/TV HH																	
Free-to-air Satellite TV/TV HH																	
Analog terrestrial/TVHH																	
Primary FTA DTT/TV HH																	
Primary pay DTT/TV HH																	
TVHH/Total HH																	
Digital/TV HH																	
Analog/TV HH																	
Pay TV Subs/TV HH																	
<i>Standalone dig cable subs (000)</i>																	
<i>Dual-play digl cable subs (000)</i>																	
<i>Triple-play dig 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>																	
Revenues (US\$ million)																	
<i>Stand-alone digital cable revs</i>																	
<i>Dual-play digital cable TV revs</i>																	
<i>Triple-play digital cable TV revs</i>																	
Digital cable TV subs revenues																	
Digital cable TV on-demand revs																	
Digital cable TV revenues																	
Analog cable TV subs revs																	
Cable TV revenues																	



Qatar pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<i>Stand-alone IPTV revenues</i>																	
<i>Dual-play IPTV revenues</i>																	
<i>Triple-play IPTV revenues</i>																	
<i>IPTV subscription revenues</i>																	
<i>IPTV on-demand revenues</i>																	
<i>IPTV revenues</i>																	
<i>Satellite TV subscription revs</i>																	
<i>Satellite TV on-demand revs</i>																	
<i>Satellite TV revenues</i>																	
<i>DTT subscription revs</i>																	
<i>DTT on-demand revenues</i>																	
<i>DTT revenues</i>																	
<i>Subscription revenues</i>																	
<i>On-demand revenues</i>																	
<i>Total revenues</i>																	
<i>Average Revenue Per User (ARPU - US\$)</i>																	
<i>Stand-alone digital cable subs</i>																	
<i>Dual-play digital cable TV subs</i>																	
<i>Triple-play digital cable TV subs</i>																	
<i>Ave digital cable (subs & VOD)</i>																	
<i>Analog cable TV subs</i>																	
<i>Stand-alone IPTV subs</i>																	
<i>Dual-play IPTV subs</i>																	
<i>Triple-play IPTV subs</i>																	
<i>Average IPTV (subs and VOD)</i>																	
<i>Pay Satellite TV (subs)</i>																	
<i>Pay Satellite TV (subs and PPV)</i>																	
<i>Pay DTT (subs)</i>																	
<i>Pay DTT (subs and PPV)</i>																	
<i>Average monthly ARPU</i>																	
<i>Pay TV subscribers by operator (000)</i>																	
<i>beIN (satellite)</i>																	
<i>OSN (satellite)</i>																	
<i>Ooredoo (IPTV)</i>																	
<i>Others</i>																	
<i>Share of pay TV subs by operator %</i>																	
<i>beIN (satellite)</i>																	
<i>OSN (satellite)</i>																	
<i>Ooredoo (IPTV)</i>																	
<i>Others</i>																	



Qatar pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Subscription & VOD revenues (US\$ million)																	
beIN (satellite)																	
OSN (satellite)																	
Ooredoo (IPTV)																	
Others																	
Share of pay TV revenues by operator %																	
beIN (satellite)																	
OSN (satellite)																	
Ooredoo (IPTV)																	
Others																	
Average Revenue Per User (ARPU - US\$)																	
beIN (satellite)																	
OSN (satellite)																	
Ooredoo (IPTV)																	



Digital TV Research publication schedule for 2021

	Title	Publication	Price
1	Africa Pay TV Forecasts	January	£1200/€1320/\$1440
2	Africa OTT TV and Video Forecasts	January	£1200/€1320/\$1440
3	Middle East & North Africa Pay TV Forecasts	January	£1200/€1320/\$1440
4	Middle East & North Africa OTT TV and Video Forecasts	February	£1200/€1320/\$1440
5	SVOD Platform Forecasts Update	February	£800/€880/\$960
6	North America Pay TV Forecasts	February	£600/€660/\$720
7	North America OTT TV and Video Forecasts	February	£600/€660/\$720
8	Latin America Pay TV Forecasts	March	£1200/€1320/\$1440
9	Latin America OTT TV and Video Forecasts	March	£1200/€1320/\$1440
10	Asia Pacific Pay TV Forecasts	March	£1200/€1320/\$1440
11	Asia Pacific OTT TV and Video Forecasts	March	£1200/€1320/\$1440
12	Eastern Europe Pay TV Forecasts	April	£1200/€1320/\$1440
13	Eastern Europe OTT TV and Video Forecasts	April	£1200/€1320/\$1440
14	Western Europe Pay TV Forecasts	April	£1200/€1320/\$1440
15	Western Europe OTT TV and Video Forecasts	April	£1200/€1320/\$1440
16	Global OTT TV & Video Forecasts	May	£1800/€1980/\$2160
17	Global SVOD Forecasts	May	£1600/€1760/\$1920
18	Global Pay TV Subscriber Forecasts	May	£1600/€1760/\$1920
19	Global Pay TV Revenue Forecasts	May	£1600/€1760/\$1920
20	Global Pay TV Operator Forecasts	June	£1600/€1760/\$1920
21	Global AVOD Forecasts	June	£1600/€1760/\$1920
22	Africa SVOD Forecasts	August	£1000/€1200/\$1300
23	Middle East & North Africa SVOD Forecasts	August	£1000/€1200/\$1300
24	Asia Pacific SVOD Forecasts	August	£1000/€1200/\$1300
25	Latin America SVOD Forecasts	September	£1000/€1200/\$1300
26	North America SVOD Forecasts	September	£500/€600/\$650
27	Eastern Europe SVOD Forecasts	September	£1000/€1200/\$1300
28	Western Europe SVOD Forecasts	October	£1000/€1200/\$1300
29	SVOD Forecasts Update	October	£1600/€1760/\$1920
30	Pay TV Forecasts Update	November	£1600/€1760/\$1920
31	SVOD Platform Forecasts Update	December	£800/€880/\$960

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