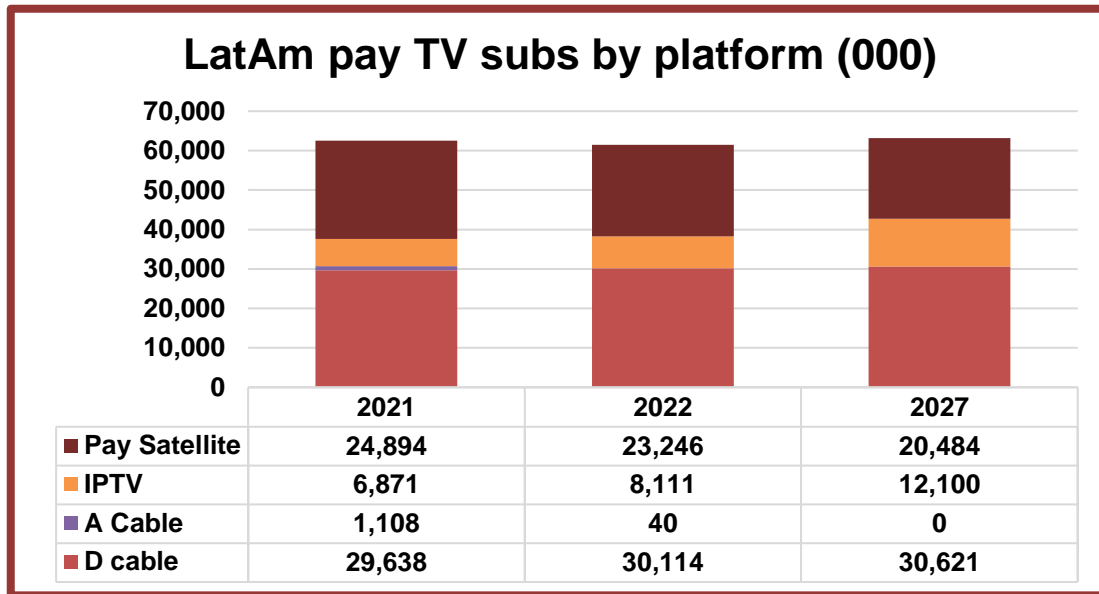


## IPTV is the Latin American pay TV winner

The number of Latin American pay TV subscribers will remain around 62 million over the next few years. Poor economic conditions pushed the total down from 73 million in the peak year of 2017. but there is stability going forward.



The pay TV subscriber total will hold steady, but satellite TV will lose more than 4 million subscribers between 2021 and 2027. Cable will be flat. IPTV will be the winner by adding more than 5 million subscribers.

Simon Murray, Principal Analyst at Digital TV Research, explained: “Broadband connections are fast becoming more important than traditional pay TV, especially as the main US-based SVOD platforms now operate across Latin America. Households have more interest in bundles – to the detriment of single-play platforms such as most satellite TV operators.”

# Latin America Pay TV Forecasts

## Table of Contents

Published in March 2022, this 160-page PDF, PowerPoint and excel report comes in three parts:

- Insight: Detailed country-by-country analysis in a 61-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 2027 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](mailto:lydia@digitaltvresearch.com)

**Forecasts for the following 19 countries and 68 operators:**

Country	No of ops	Platform forecasts
Argentina	5	Flow; Supercanal; DirecTV; Telefonica; Claro
Bolivia	2	Tigo; Entel
Brazil	3	Claro; Telefonica/Vivo; Sky
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	Altice/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; Tigo
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: Bahrain pay TV insight

Pay TV penetration will not increase by much – reaching 33% by 2027. **Pay TV revenues** will be flat at \$27-30 million as competition cuts ARPUs.

Main assumptions behind the forecasts	
•	FTA satellite TV is the main TV reception platform – accounting for 63% of the TV households.
•	As well as satellite TV, OSN packages are available on most of the other pay TV platforms.
•	Batelco will remain the main pay TV platform.
•	Limited cable networks were phased out.
•	Analog terrestrial switch-off was achieved by end-2013.

Bahrain achieved complete **digital TV penetration** in 2013. About three-quarters of the 282,000 TV households receive digital satellite signals. IPTV subs have overtaken satellite TV.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	56	-	-	OSN
beIN	16	-	-	-
OSN	17	-	-	-
STC	-	-	-	Shahid VIP; OSN; Telly; Jawwy; Spuul
Zain	-	-	845	Netflix; Shahid VIP; Telly; Yupp

The dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. Most governments followed the mid-2017 Saudi ban on beIN – although not all of them have enforced the ban that effectively. The ban was officially lifted in late 2021. **beIN** renewed several key sports rights, which will help to push its subscriber numbers back up.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers, although it dropped much of its sports coverage. OSN has exclusive deals with seven Hollywood studios. It will increase Arabic content to a quarter of the total.

OSN provides 41-47 channels for BHD16-35/month (\$42.11-92.11). We estimate that the company had 17,000 satellite TV subscribers by end-2021, falling to 11,000 in 2027 as OSN places more emphasis on its SVOD platform.

**Batelco** started offering IPTV services via its FTTH network (up to 500Mbps) in September 2011. Batelco had 56,000 IPTV subs at end-2021 and will have 66,000 by 2027. Batelco also offers OSN's SVOD platform (BHD4/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN (BHD4/month), Jawwy TV (BHD3/month), Shahid VIP (BHD3/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

Rival **Zain** carries Zee5 (BHD1.90/month), Apple TV+, Viu (BHD3/month) and Shahid VIP (BHD3/month). Zain is 55.4% owned by the Zain Group.

**Digital terrestrial switchover**, using the DVB-T2 standard, was completed in 2013, although its impact is limited because of the ready acceptance of other platforms.

## SAMPLE: Bahrain pay TV forecasts

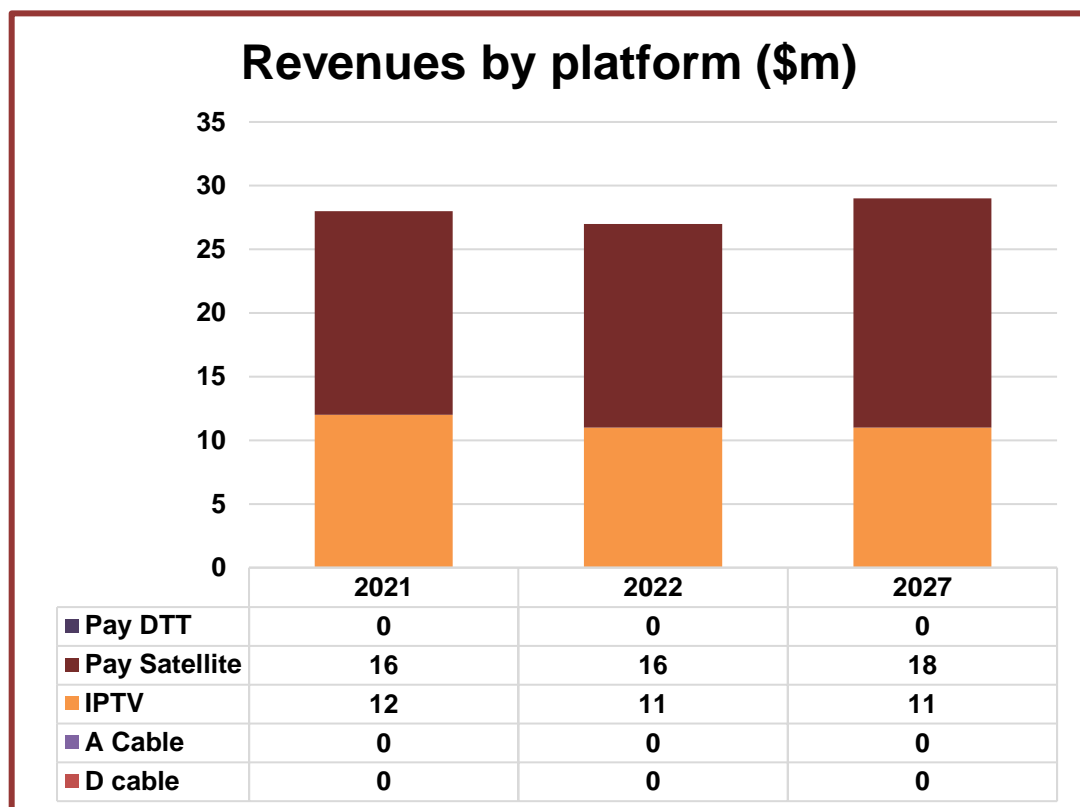
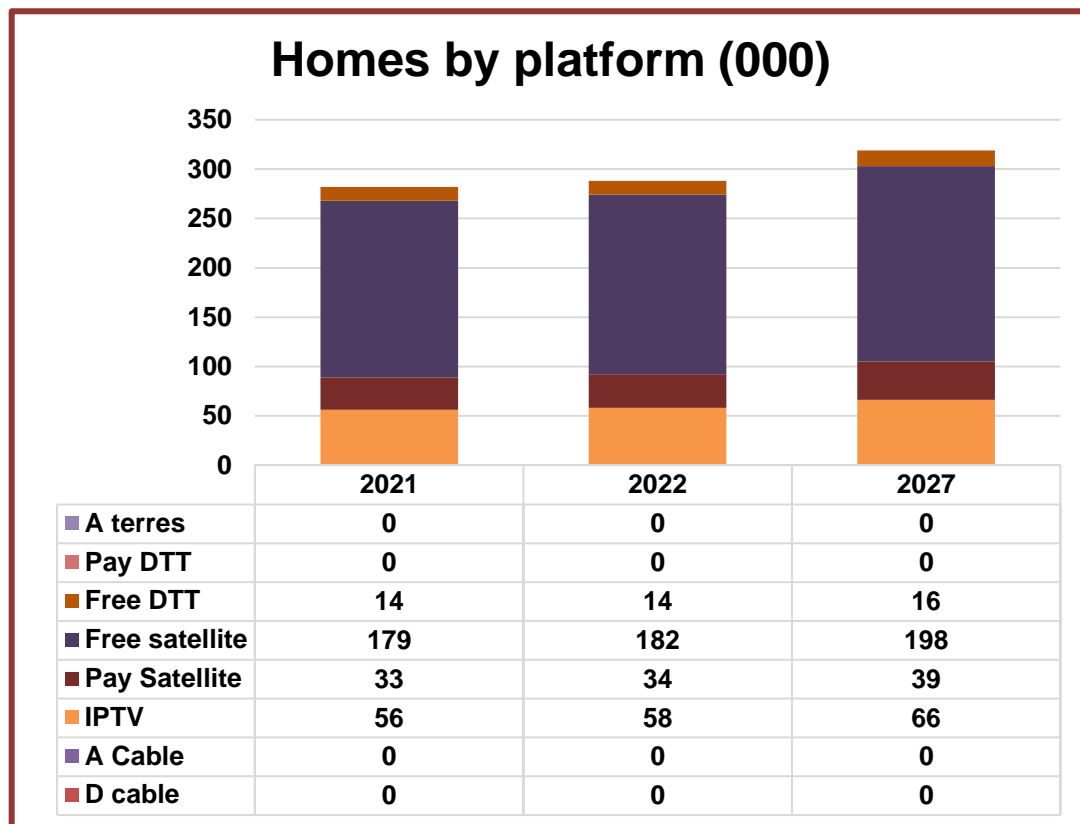
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total households (000)																		
TV households (000)																		
Digital cable subs (000)																		
Analog cable subs (000)																		
Pay IPTV subscribers (000)																		
Pay digital Satellite TV subs (000)																		
Free-to-air Satellite TV HH (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)																		
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																		
Revenues (US\$ million)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Total revenues																		
Average Revenue Per User (ARPU - US\$)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Average monthly ARPU																		



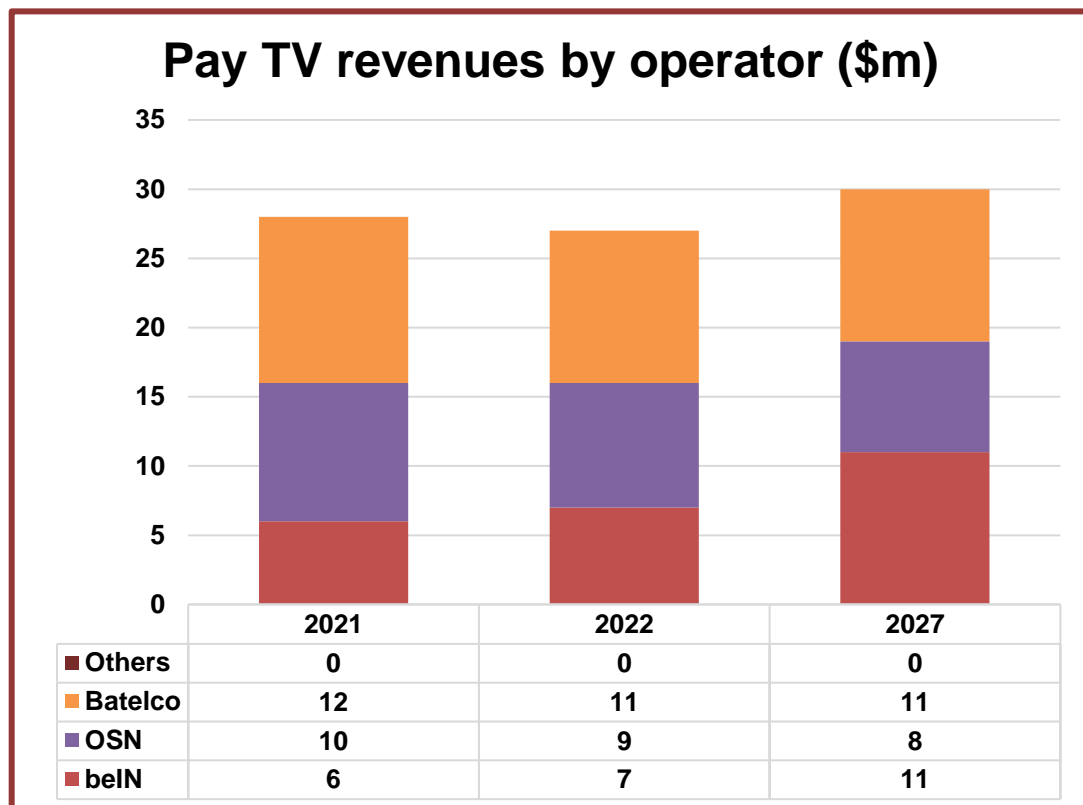
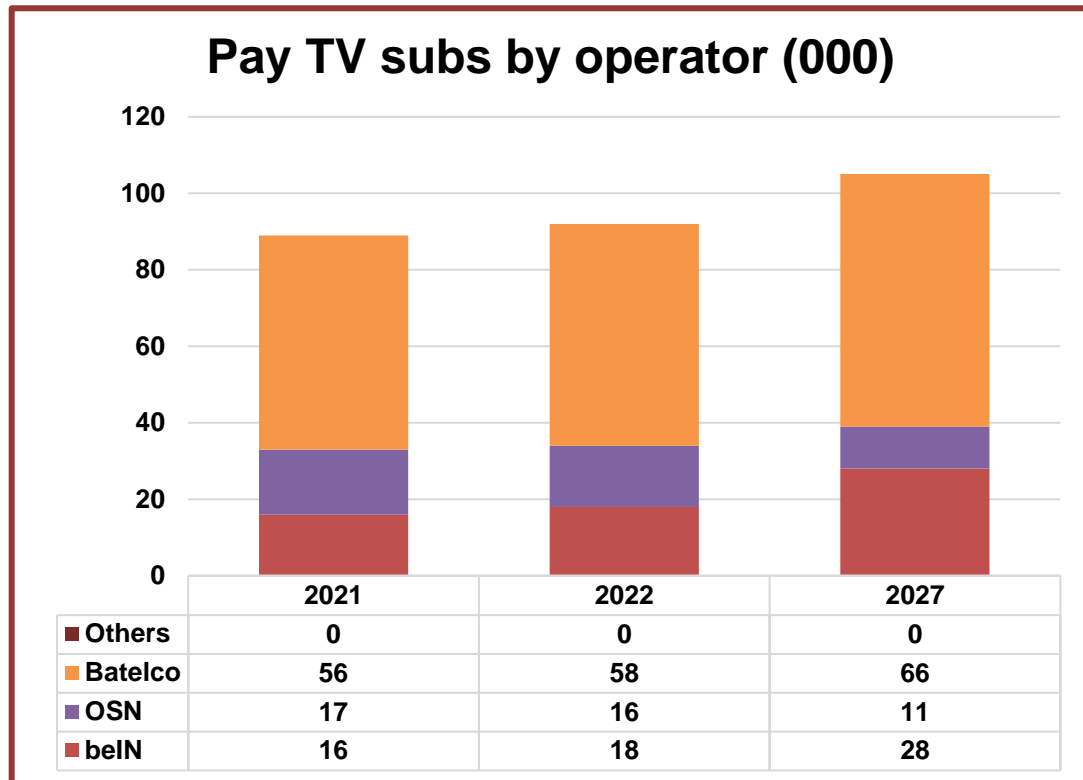
## SAMPLE: Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
<b>Pay TV subscribers by operator (000)</b>																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
<b>Share of pay TV subs by operator %</b>																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
<b>Pay TV revenues by operator (\$ million)</b>																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
<b>Share of pay TV revenues by operator %</b>																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		

## SAMPLE: Bahrain pay TV outlook



## SAMPLE: Bahrain pay TV outlook





## Digital TV Research report schedule for 2022

Title	Publication	Price
<a href="#">1 Africa Pay TV Forecasts</a>	January	£1400/€1600/\$1875
<a href="#">2 Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1400/€1600/\$1875
<a href="#">3 SVOD Forecasts Update (based on December 2021 results)</a>	February	£1800/€2050/\$2400
<a href="#">4 Africa OTT TV and Video Forecasts</a>	February	£1400/€1600/\$1875
<a href="#">5 Middle East &amp; North Africa OTT TV and Video Forecasts</a>	February	£1400/€1600/\$1875
<a href="#">6 North America Pay TV Forecasts</a>	February	£700/€800/\$940
<a href="#">7 North America OTT TV and Video Forecasts</a>	February	£700/€800/\$940
<a href="#">8 Latin America Pay TV Forecasts</a>	March	£1400/€1600/\$1875
<a href="#">9 Latin America OTT TV and Video Forecasts</a>	March	£1400/€1600/\$1875
<a href="#">10 Asia Pacific Pay TV Forecasts</a>	March	£1400/€1600/\$1875
<a href="#">11 Asia Pacific OTT TV and Video Forecasts</a>	March	£1400/€1600/\$1875
<a href="#">12 Eastern Europe Pay TV Forecasts</a>	April	£1400/€1600/\$1875
<a href="#">13 Eastern Europe OTT TV and Video Forecasts</a>	April	£1400/€1600/\$1875
<a href="#">14 Western Europe Pay TV Forecasts</a>	May	£1400/€1600/\$1875
<a href="#">15 Western Europe OTT TV and Video Forecasts</a>	May	£1400/€1600/\$1875
<a href="#">16 Global OTT TV &amp; Video Forecasts</a>	May	£2000/€2300/\$2600
<a href="#">17 Global SVOD Forecasts (based on March 2022 results)</a>	May	£1800/€2050/\$2400
<a href="#">18 Global Pay TV Subscriber Forecasts</a>	June	£1800/€2050/\$2400
<a href="#">19 Global Pay TV Revenue Forecasts</a>	June	£1800/€2050/\$2400
<a href="#">20 Global Pay TV Operator Forecasts</a>	June	£1800/€2050/\$2400
<a href="#">21 Global AVOD Forecasts</a>	June	£1800/€2050/\$2400
<a href="#">22 SVOD Forecasts Update (based on June 2022 results)</a>	August	£1800/€2050/\$2400
<a href="#">23 Africa SVOD Forecasts</a>	August	£1200/€1380/\$1600
<a href="#">24 Middle East &amp; North Africa SVOD Forecasts</a>	August	£1200/€1380/\$1600
<a href="#">25 Asia Pacific SVOD Forecasts</a>	August	£1200/€1380/\$1600
<a href="#">26 Latin America SVOD Forecasts</a>	September	£1200/€1380/\$1600
<a href="#">27 North America SVOD Forecasts</a>	September	£600/€690/\$800
<a href="#">28 Eastern Europe SVOD Forecasts</a>	September	£1200/€1380/\$1600
<a href="#">29 Western Europe SVOD Forecasts</a>	October	£1200/€1380/\$1600
<a href="#">30 SVOD Forecasts Update (based on September 2022 results)</a>	November	£1800/€2050/\$2400
<a href="#">31 Pay TV Forecasts Update</a>	November	£2000/€2300/\$2700

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