**INTELSAT** 

# **Digital and HD Adoption** Is Driving Growth in the Latin America **Pay TV Market**

### How Satellite Is Helping **Programmers Meet Demand**

In the ever-evolving media landscape, satellite helps programmers engage viewers and capture new audiences. More than any other distribution solution, the unparalleled reach and reliability from Intelsat's four satellites in Latin America give programmers the flexibility to meet customer expectations today and tomorrow-and take advantage of greater revenue potential.

Our Media Market Watch 2021: Latin America report revealed the opportunities and advantages satellite offers distributors in the region.



### **A Closer Look at the Latin America Market**

**Top 5 Pay TV Markets** 

by Household

General Pay TV market trends for Latin America are looking up. Many investors and broadcasters see good market potential for Latin America as economic recovery progresses.

#### 2020 Pay TV Market Share

3.2%

increase in Mexico, secondlargest Latin America market

#### **Subscribers**



MEXICO **33.7**M BRAZIL **70.2**M

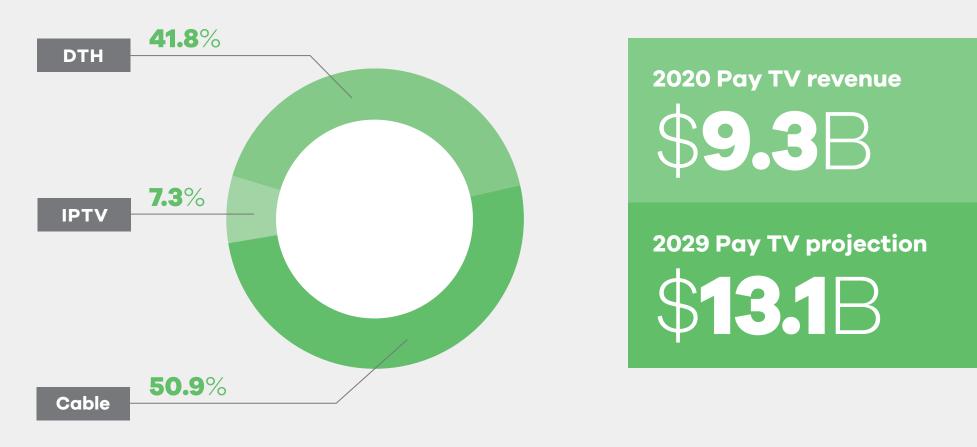


Source: S&P

## **The Potential for Pay TV**

The video market is rich in potential: It ranks #4 in revenue and #5 in subscribers for Pay TV worldwide.

### **Share by Platform**



### **HD on the Rise**

Latin America's HD cable boom began in 2008, when just 394,000 households had HD access.

By 2028, HD access is expected to reach 108 million households across the region more than 2x the households with access in 2019 (52.3 million).

Expanding access and affordability drives significant investment in higher-quality content to meet the demand on the ground.

# **The Advertising Advantage**

#### **HD Cable Subscribers**

2029

2019

**18**M

2024 Advertising **Revenue Projections** 

TV advertising revenue, currently at \$7.9B, far outpaces revenue from internet advertising, and this trend shows no sign of stopping.

TV



Internet



### The Leader in Satellite Connectivity

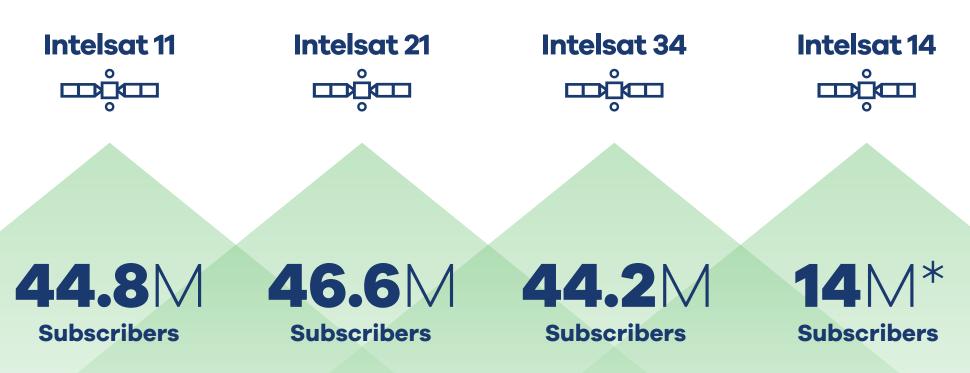
Intelsat satellites transmit most of the top channels in Latin America, reaching over 2700 Pay TV operators and full cable penetration across 46.6M cable subscribers.

Intelsat delivers twice as much content as any other operator in the region.

	Mexico	Brazil	Chile
Intelsat share of top 50 channels	84%	80%	84%

### **Delivering Quality and Capacity**

Intelsat's neighborhoods deliver nearly 200 unique channels to over 46 million cable subscribers.



Top Regions	Top Regions	Top Regions	Top Regions
Argentina	Argentina	Argentina	Peru
Brazil	Chile	Brazil	Brazil
Chile	Colombia	Chile	Chile

\*Upon antenna seeding completion

# **Moving Media Forward With Satellite**

Satellite continues to be the most reliable and affordable option for distributing media in Latin America and the Caribbean.



#### **More Content**

Offers viewers access to more premium and more regional channels



More Coverage

Covers a larger expanse of the region than internet-based methods, and provides connectivity to other regions

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#### **More Flexibility**

Meets audiences where they are, leading them to higher-quality programming



#### More Revenue

Gives broadcasters confidence in the sustainability of their business model

Overall, demand for higher-quality content coupled with satellite's dynamic capabilities and huge advertising advantage mean good business for Latin America.

To learn more, download Media Market Watch 2021: Latin America.

# Let's talk

Discover how access to the largest, most reliable global broadband network can bring you more revenue and your viewers more high-quality programming.

**Learn More** intelsat.com/contact-us



MediaKind, November 2020 S&P: S&P Global Market Intelligence, September 2020