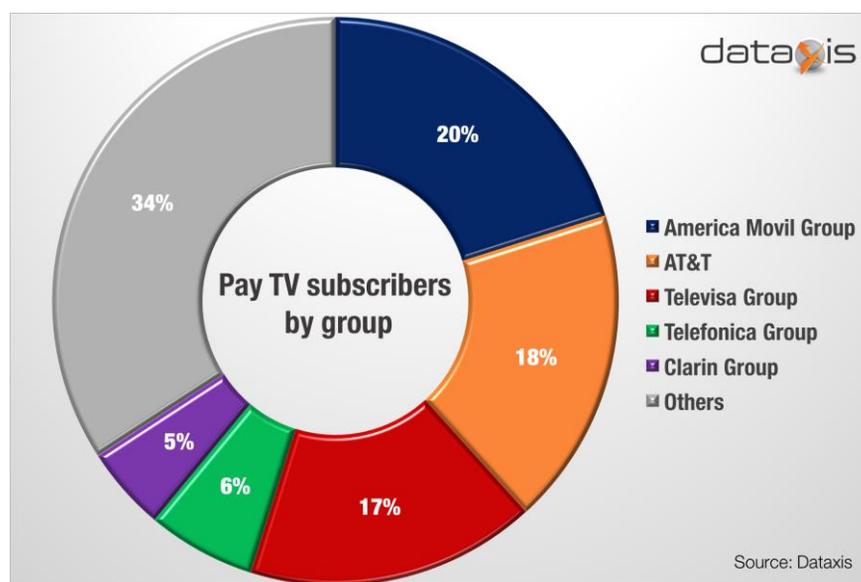


Five large groups make up for two thirds of Latin American Pay-TV

According to Dataxis' latest quarterly research (Q1 2017), the top five groups of Pay-TV operators (America Movil, AT&T, Televisa Group, Telefonica Group and Clarin Group) account for almost two-thirds of the market. The top three capitalizes on more than half of the market. The leader, America Movil, gathers one fifth of the subscribers of the region (14.6 million subscribers), more than total markets of Argentina and Colombia.



All these groups are multi-nationals that operate at least in 2 different countries (Grupo Clarín) or more (14 for America Movil). Dataxis' research shows that they have a very high markup quota (30% or more) in countries where the strongest operators are. For example, with its subsidiaries Izzi Cable and Sky Mexico, **Televisa Group occupies 61% of the pay-TV market in Mexico** and **America Movil acquired more than 51% of Brazil's subscribers with Claro Brazil and Blue.**

In addition to geographic diversification, these groups have a diversified business. All of them - except for AT&T- operate as fixed-line and broadband players, generally in countries where they already offer a Pay-TV service.

By Camille Dupont

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Dataxis is a global firm specializing in the delivery of detailed market research, high quality events, and powerful media covering the TV and Telecom industries in more than 200 countries. Dataxis has offices in Europe, Latin America and Africa. Dataxis Intelligence launched its quarterly online service in 2003 and quickly became recognized as a leading source of information for major operators, technology suppliers, content providers and governmental bodies around the globe. The online intelligence service and market reports provide key indicators, statistics, forecasts and analysis of all TV and Telecom operators worldwide. Please visit www.dataxis.com