

One of the greatest communication mediums in Brazil Subscription TV continues in its fast-paced growth trend in Brazil. The subscriber's base has already reached 6.3 million domiciles, a growth of 14.5% in comparison with 2007, with over 21 million people practically all over the country with DTH technology and, in the case of the main five hundred cities, with cable and MMDS. At present, 42% of the consumers have been subscribers for at least four years, while 29% has access to the channels for one year or less.

## Subscribers

**6,3** million subscribing homes in Brazil

Source: PTS March and April 09 - Base December 08

**21** million people have access to subscription TV

Source: PTS March and April 09 - Base December 08

**78%** belong to class AB

Source: Ibope Media Workstation - 6 Markets - Jan/Dec 08 - TT. Individuals with Pay TV

**49%** of the base watches subscription TV channels daily

Source: Ibope Media Workstation - 6 Markets - Jan/Dec 08 - TT. Individuals with Pay TV

**2h03** is the average time spent watching the medium

Source: Ibope Media Workstation - 6 Markets - Jan/Dec 08 - TT. Individuals with Pay TV

## The medium in 2008

Advertising investments grew **26%**

Source: Inter-melos

The volume of advertising insertions grew **7%**

Source: Ibope - Ibope Monitor 2008 vs. 2009

More than **800** advertisers used subscription TV

Source: Ibope Midia - Monitor Evolution 2<sup>nd</sup> batch of Dec 08

**41%** of advertisers and agencies want to increase investments in subscription TV in 2009 and 41% intend to maintain the volume of investments of 08

Source: Singular - arquitetura de mídia - PMV 2008

The medium continues to be present especially with AB class consumers, but it is already extraordinary its penetration with consumers with less buying power. In common, they share the taste for quality, diversified and increasingly interactive programming. They are people with more social and ecologic awareness, who value technology. The subscribers dedicate to the medium, daily, at least two hours and they are people who consume more than the average of the population, 43% more, in the case of supermarkets, for example. Almost a third of the subscribing domiciles have two or more cars and 11% has either a house or an apartment on the beach.

As to the advertising the subscription TV broadcasters revenues were over R\$ 800 million in 2008, a growth of 26% in comparison with the previous year. In the first quarter of 2009, this growth trend was maintained despite the crisis in the international markets, with an evolution of almost 17%. More than 800 advertisers were present in subscription TV in 2008, with 7% more insertions than in the previous year, the highlight being the visible growth of insertions by the big retail chains.



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