

*CANADIAN*  
*DIGITAL TV SERVICES*  
*MARKET REPORT*



*2015 EDITION*

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**About this Report**

As the roles of telecommunications, Internet and electronic entertainment become increasingly intertwined, NBI/Michael Sone Associates' **Canadian Digital TV Services Market Report, 2015 Edition** provides a single source of information regarding recent and expected developments in the converging cableco, telco, Internet and satellite television sectors.

The report is divided into five sections. The first opens with a snapshot of the Canadian market for digital television services, the technologies that drive them and the service providers deploying them. This Overview examines the differences and commonalities of Digital Cable, IPTV and Satellite, discusses the impact of technological changes on the market. Section 2 discusses other issues such as cloud-based PVRs and current regulatory matters, while Section 3 profiles the major equipment manufacturers' offerings such as middleware, set-top boxes and end-user solutions, as well as their relationships with particular service providers.

Section 4 examines in more detail so called "over-the-top" or OTT delivery of TV services via the Internet. The analysis looks at the impact that Netflix and Apple TV, along with the two new Canadian entrants – CraveTV and shomi - are having on the pay-TV industry. The section also profiles Zazeeen and VMedia – two BDUs that deliver both linear and streamed TV - over the Internet rather than via a dedicated network and the possible entry of a third, TekSavvy, that might employ a hybrid approach.

Section 5 contains 10 service provider profiles, including details of deployment and partnerships. Particular emphasis is placed on the role that IPTV plays in providing the telcos with their terrestrial-based offering both to compete with the cablecos and complement their own satellite service and the cablecos' inevitable response in migrating to

IP or pursuing other technologies to counter the threat to their businesses. Finally, a series of exhibits illustrates subscriber & revenue estimates, market shares and forecasts for 2014 to 2018.