

CANADIAN  
DIGITAL TV SERVICES  
MARKET REPORT



2014 EDITION

NBI/Michael Sone Associates Inc.  
Telephone 416-360-0424  
e-mail [msone@nbicanada.com](mailto:msone@nbicanada.com)

NBI / MICHAEL SONE  
ASSOCIATES INC.

[www.nbicanada.com](http://www.nbicanada.com)

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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, 2014 Edition** provides a single source of information regarding recent television developments in the converging cableco, Internet, telco and satellite sectors.

At more than 80 pages, the report is divided into five sections. The first section 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 concept of TV Everywhere, standards development, advantages and/or limitations of each, and future developments. A second section discusses other issues such as cloud-based PVRs and current regulatory matters, while Section Three profiles the major equipment manufacturers' products such as middleware, set-top boxes and end-user solutions, as well as their relationships with particular service providers. Section Four examines the subject of so called "over the top" or OTT delivery of TV services via the Internet, the possible impact of that medium and two of its major practitioner companies, Apple TV, Netflix and now two Canadian entrants, Zazeeen and VMedia, are having on the entire pay-TV industry.

The fifth section 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. Finally, a series of exhibits illustrates subscriber & revenue estimates, market shares and forecasts for 2012 to 2017 as well as provincial segmentation for 2013.

