

CANADIAN
DIGITAL AND IPTV SERVICES
MARKET REPORT



2012 EDITION

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About this Report

NBI/Michael Sone Associates' **Canadian Digital and IPTV Services Market Report, 2012 Edition** is our fifth publication on this sector. As the roles of telecommunications and electronic entertainment become increasingly intertwined, with the telcos offering TV, and the cablecos phone services, this report provides a single source of information regarding recent television developments in the converging cableco, telco and satellite sectors. It examines the latest and emerging technologies for delivering user-manageable TV services and touches on the role that wireless technologies are starting to play in endowing broadcast television with real time mobility.

The report is divided into four 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 between 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 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 three broaches the subject of so called "over the top" or OTT delivery of TV services via the Internet and the impact that medium and two of its major practitioner companies, Apple TV and Netflix, are having on the entire pay-TV industry.

The fourth section contains 11 service provider profiles, including details of deployment and partnerships. Particular emphasis is placed on the increasing 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. Finally, a series of exhibits illustrates subscriber & revenue estimates, market shares and forecasts for 2010 to 2015.