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CATM Canada - Harvard Business School Scholarship Essay Application

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## **CTAM Experience**

CTAM Canada has been a part of the last 14 plus years of my life. I've been lucky enough to work in an organization that encourages its employees to participate in CTAM events and create meaningful exchanges between members of the industry.

On a more personal level, I have had the opportunity to participate on the CTAM Canada Board as Events Co-Chair. My involvement on the board ran from January 2019 to December 2021. I had the opportunity to organize some truly meaningful in-person events. Some of these events include: President's Reception, Leadership Forum, Genie's Breakfast and Blue Jay Game to name a few.

Unfortunately, with the arrival of Covid the events team had to learn how to shift gears and create membership engagement via virtual events. With a new outlook on how to bring people together virtually we planned the following virtual events: Broadcaster Forum, Lunch and Learn events, Covid Research Results as well as our infamous social mixology events.

In addition to all the previous events mentioned above I also kicked off the Montreal annual social event at the Stingray office. In both 2022 and 2023 I helped to organize the event on a volunteer basis and enjoyed bringing the industry together.

**Essay Question:**

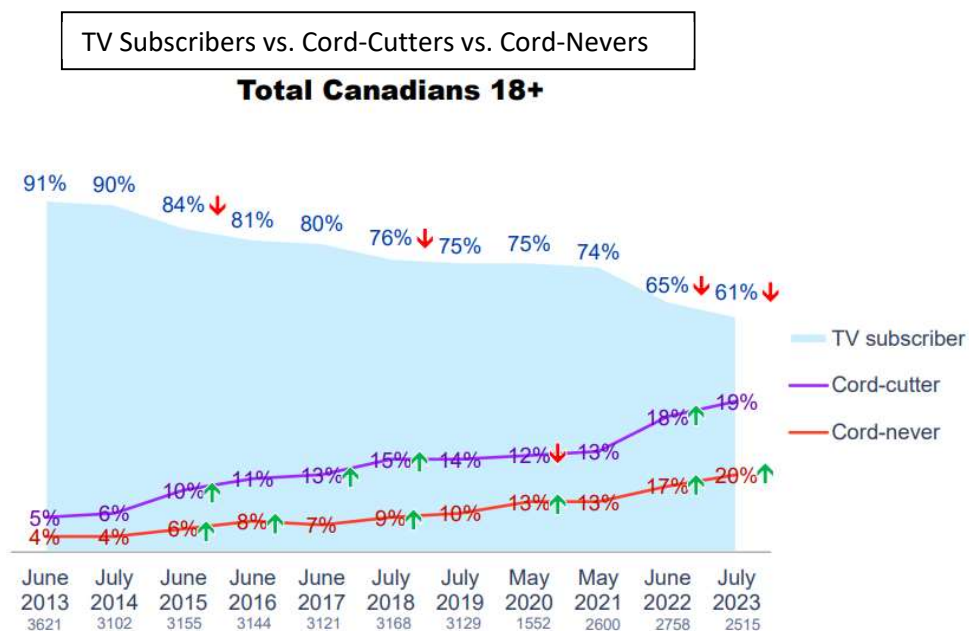
"Analyze the impact of free ad-supported linear channel platforms on traditional cable TV/telco companies, focusing on potential threats and competitive advantages. Discuss strategies for cable/satellite/telco providers dealing with these challenges, considering paid subscription services. Explore the CRTC's role in regulating FAST platforms while prioritizing Canadian industry competitiveness and consumer choice."

**Essay Response:**

The TV industry landscape has begun to change as we know it. No longer is it a criminal offence to stream free content. Instead, free content is now being integrated directly within the products that we already use. A customer can turn on their Samsung, LG or Roku TV and access thousands of hours of content all for free. Advertising isn't something new and most consumers are willing to watch ads to receive free quality content. In addition, consumers are even more price sensitive due to the increase of the cost of living therefore free options become even more appealing.

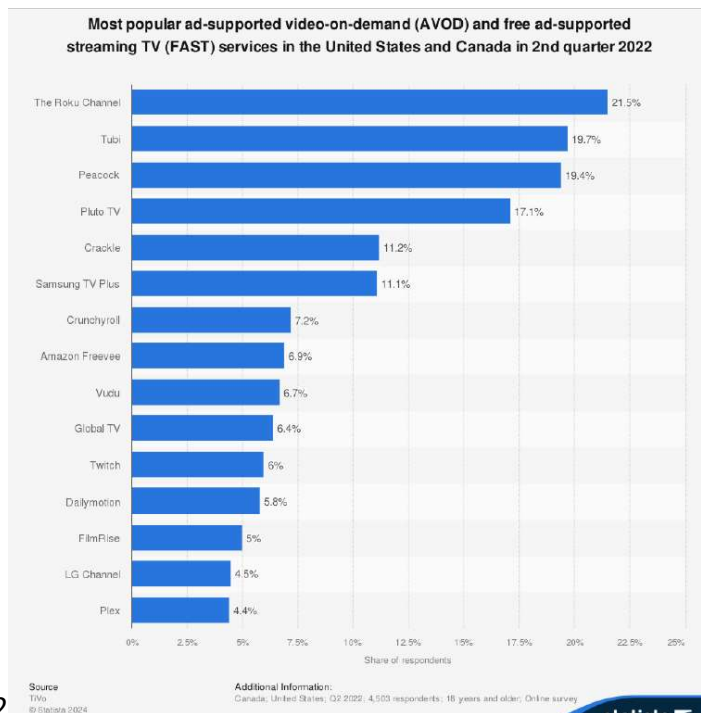
The following chart from the Media360 July 2023 results provide some context to the Canadian TV subscriber trends over the last 10 year. With the growing number of cord-nevers and cord-cutters, these individuals have an appetite for curated content. As demonstrated in the chart, TV subscriptions

<sup>1</sup>Table 1



are decreasing at a rapid rate, with an annual churn rate of approximately 4%. With the decline in TV subscriptions, cable/satellite and telco providers are clearly feeling threatened at the prospect of even greater attrition.


Cable, satellite and telco providers are feeling the latest effects from the free ad-supported linear channel competition as well as the major subscription services and AVOD content. With a focus, in this essay, on the free ad-supported TV channels (FAST), one major threat is the ease of access to a wide variety of content. As previously stated, FAST channels have become an integral part of connected TVs. They have become a selling feature for the TV manufacturers and have enabled them to find a new revenue stream. There is also a plethora of applications that offer a wide variety of free curated FAST channels, including, Pluto TV, Tubi and more. Table 2 outlines the most popular services currently viewed in Canada and the US as of June 2022. These un-regulated platforms have provided a new outlet to air more niche channels and revive content from the vault.



<sup>2</sup>Table 2

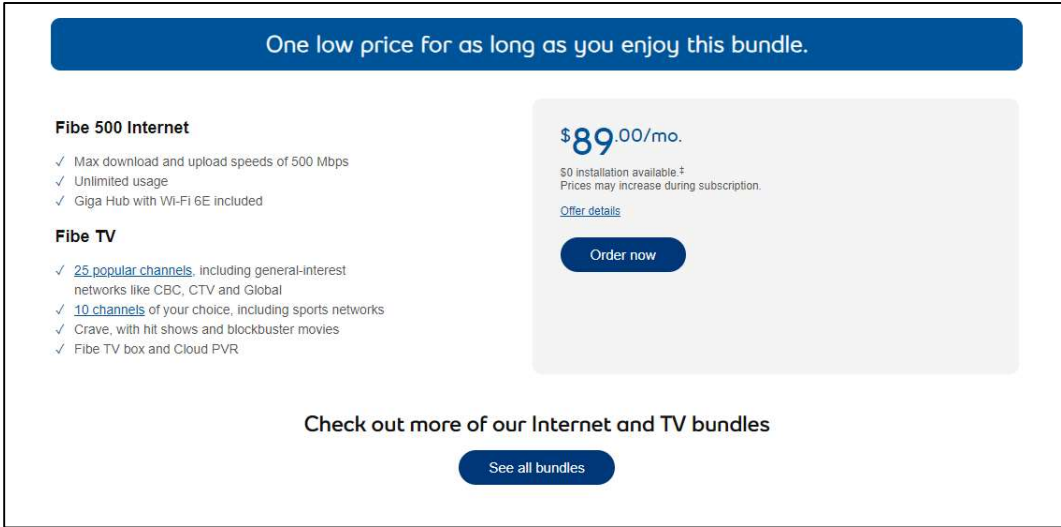
<sup>2</sup> TiVo. (October 11, 2022). Most popular ad-supported video-on-demand (AVOD) and free ad-supported streaming TV (FAST) services in the United States and Canada in 2nd quarter 2022 [Graph]. In Statista. Retrieved February 08, 2024, from <https://www.statista.com/statistics/1132778/growth-avod-services-north-america/>

As outlined in the Media360 report, FAST channel services are being used by a growing percentage of subscribers year after year, and there is the threat of continued growth. A 3% increase of the usage of FAST services was seen from 2022 to 2023 in Canada.<sup>3</sup> This growth is almost proportionate to the yearly decrease in TV subscriptions that is demonstrated in Table 1.



**28%**  
of Canadians report using at least one FAST service, vs. **25%** in October 2022

However, TV providers have some competitive advantages that they can use as levers to retain their subscribers. They have the benefit of access to major new releases from the movie and TV industry. Customers that are looking for the latest TV series or movie are more likely to easily find what they are looking for via their TV provider. At the present time almost all live sports, award shows and any major live event can still be found through a TV provider. Another competitive advantage is that in most cases TV providers offer ancillary services such as mobile and internet. This allows the TV provider to find ways to package the TV subscription as an add on or bundle. As demonstrated on the Bell.ca website in the visual below this is already a common practice and will allow for some customer retention.



One low price for as long as you enjoy this bundle.

**Fibe 500 Internet**

- ✓ Max download and upload speeds of 500 Mbps
- ✓ Unlimited usage
- ✓ Giga Hub with Wi-Fi 6E included

**Fibe TV**

- ✓ [25 popular channels](#), including general-interest networks like CBC, CTV and Global
- ✓ [10 channels](#) of your choice, including sports networks
- ✓ Crave, with hit shows and blockbuster movies
- ✓ Fibe TV box and Cloud PVR

**\$89.00/mo.**

\$0 installation available †  
Prices may increase during subscription.

[Offer details](#)

[Order now](#)

Check out more of our Internet and TV bundles

[See all bundles](#)

<sup>4</sup> Bell.ca website

TV providers will also have to strategize and find a way to pivot their business to remain relevant. Early adopters of change stand to benefit in the long-run. From a strategic standpoint, TV providers should look at incorporating some FAST channels into their line-up. This would allow for additional revenue and

<sup>3</sup> YouGov. (2023). CTAM Canada Media 360 July 2023 Full National Results (p. 42). CTAM Canada.

<sup>4</sup> Bell Canada. (2024) Bundles [Webpage]. Retrieved February 6, 2024 from [https://www.bell.ca/Bell-bundles/Internet-TV/Promotions/fibeduo#INT=BUN\\_isphmpg\\_TIL\\_Q12024QCMass\\_Acq\\_012924\\_vg](https://www.bell.ca/Bell-bundles/Internet-TV/Promotions/fibeduo#INT=BUN_isphmpg_TIL_Q12024QCMass_Acq_012924_vg)

a way to decrease their subscription fees. To be able to remain competitive they must continue to offer the highest standard of programming while making their services as affordable as the competitors' subscription services on the market. Comcast announced in the summer of 2023 that they had integrated 20 FAST channels as part of their EPG. Their focus is on the quality of the programming and not the quantity of channels offered.<sup>5</sup> Unfortunately, there will be a technical challenge for the satellite TV providers as they will not be able to incorporate FAST channels into their offer to offset their fees with programmatic advertising.

Another important strategic element will be the positioning and perception of the TV providers brand in the marketplace. They will need to work on changing the mind-set of the consumer and demonstrate that they are a platform that offers more value to the consumer with equal and more content. To be able to change the consumers perception the feel of the TV interface will have to resemble what customers are experiencing on Samsung TV + or Pluto TV.

The CRTC has an important role to play in the industry now more than ever with a growing number of over-the-top (OTT) companies in the market. With multiple types of platforms co-existing in the same marketplace, rules should be put into place to create fair competition. At this point in time, cable TV /telco companies are required to follow stringent regulations imposed upon them. Similar types of rules should apply to new players in this ever-changing environment. Here are some concepts that could be incorporated into the CRTC FAST regulations that would benefit industry competitiveness and the protect the consumer. The CRTC should look at mandating that there be a distinct programming difference between the content aired for free vs. what is distributed by the cable TV/telco companies. The TV providers should receive the first run of the content for a pre-determined period of time. This would allow for TV providers to demonstrate the value of the subscription fee and have clear promotional levers. The CRTC should also outline the minimum and maximum number of advertising minutes per hour to create equality among the channels. The CRTC should also enforce the same Canadian content programming percentage rules as TV providers have to follow. Along those lines the FAST platforms should also contribute a percentage of gross revenue towards Canadian programming. Lastly, there should be a maximum number of channels that a FAST platform can carry. That way it will ensure that there is fair competition between the platforms.

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<sup>5</sup> Comcast. (July 17, 2023). Comcast Brings 20 FAST Channels to the X1 Channel Guide. Retrieved on February 6, 2024 from <https://corporate.comcast.com/stories/comcast-brings-20-fast-channels-to-the-x1-channel-guide>

It is obvious that we are living in a time of change in the TV industry. A disrupter has entered the market and a change in policy is required. Cable and telco providers in Canada need to adapt to the new reality of the competition and develop new strategies to stay relevant, reduce churn and enhance their offer. TV providers will have to learn how to play the game as well. But without rules there is no game and that's why the CRTC is so important. All players should have to abide by the same or very similar rules to make it a viable competitive industry. This is for the good of the market, growth of locally produced Canadian content and job security within the TV industry. Only time will tell what type of changes will occur but changes are definitely required.



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