### <u>CANADIAN</u> <u>TV EVERYWHERE MARKET REPORT</u>



2013 EDITION

NBI / MICHAEL SONE ASSOCIATES INC.

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#### About this Report

At close to one hundred pages, NBI/Michael Sone Associates' Canadian TV Everywhere Market Report, 2013 Edition is the first comprehensive and independent study published on this new and exciting industry segment.

The report examines all aspects of TV Everywhere (TVE) – from its original mobile TV approach, through OTT to true TVE services. It includes detailed discussions, analysis, opinion and technical explanation on each of these elements along with estimates and forecasts of subscribers and revenues. This publication attempts to leave no stone unturned in providing the reader a clear understanding of the history, status, opportunities and issues surrounding TVE.

The narrative opens with an overview of the origins and a short history of TVE and goes on to ask the question "What is TV Everywhere". The subsequent three sections provide answers through discussion on such concepts as cellular versus app-based TVE, end-user devices, broadcasting and broadband technologies, and cellular versus Wi-Fi delivery. Section five consists of profiles of the major TVE Platform providers, while the next three sections examine in detail the TVE services offered by the cableco and telcos and the growing roles played by OTT access providers and the TV networks themselves. The report then goes on to consider the role played by consumers. Sections 10 through 12 explore technical and legal issues along with forecasts of subscriber and revenue growth for the next three years. The report wraps up by asking "Are we there yet?" and goes on to explain why TVE is still a work in progress.

Nine Exhibits, two Figures and an Appendix provide quantitative and graphical illustrations of subscribers and revenues as well as explanations of TVE platforms and summaries of services offered.