

CANADIAN
MOBILE WIRELESS COMMUNICATIONS
SERVICES MARKET REPORT



2019 EDITION

NBI / MICHAEL SONE
ASSOCIATES INC.

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TABLE OF CONTENTS

| <u>Section</u> | <u>Page</u> |
|--------------------------------|--------------------|
| About this Report | v |
| 1.0 Market Overview | 1 |
| 2.0 Regulatory & Policy Issues | 7 |
| 3.0 Technology Review | 16 |
| 3.1 Spectrum | 16 |
| 3.2 Fifth Generation – 5G | 20 |
| 4.0 Service Providers | 28 |
| 4.1 Bell Wireless | 28 |
| 4.2 Eastlink | 33 |
| 4.3 Freedom Mobile | 34 |
| 4.4 Ice Wireless/Iristel | 37 |
| 4.4.1 Sugar Mobile | 40 |
| 4.5 Rogers Wireless | 41 |
| 4.6 SaskTel | 45 |
| 4.7 TELUS | 48 |
| 4.8 Videotron | 52 |
| 4.9 Xplore Mobile | 55 |
| 5.0 EXHIBITS | 57 |

***CANADIAN MOBILE WIRELESS COMMUNICATIONS
SERVICES MARKET REPORT, 2019 EDITION***

LIST OF EXHIBITS

| <u>Exhibit</u> | <u>Page</u> |
|---|--------------------|
| Exhibit 1: Subscribers/Net Activations by Service Provider (2017-2022) | 58 |
| Exhibit 1a: Flanker Subscribers by Service Provider (2017-2022) | 58 |
| Exhibit 2: Subscribers by Service Provider by Province (2017-2022) | 59 |
| Exhibit 3: Subscriber % Share by Service Provider by Province (2017-2022) | 60 |
| Exhibit 4: Subscriber Penetration of Canadian Population (2017-2022) | 61 |
| Exhibit 5: Subscribers by Postpaid vs. Prepaid and Consumer vs. Business by Service Provider (2017-2022) | 61 |
| Exhibit 6: Service Revenue by Voice & Data and Average Revenue per Unit, by Service Provider (2017-2022) | 62 |
| Exhibit 7: Monthly Churn (%) and Cost of Acquisition (COA) by Service Provider (2017-2019) | 63 |
| Exhibit 8: Text and Multimedia Messages by Service Provider (2017-2022) | 63 |
| Exhibit 9: Total Wireless Data Traffic by Service Provider (2017-2022) | 63 |

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About this Report

Having published this report for almost 30 years, NBI/Michael Sone Associates' **Canadian Mobile Wireless Communications Services Market Report, 2019 Edition** continues to be the most comprehensive, independent study published on this industry.

The report examines in detail the mobile wireless market in Canada by focusing on numerous service provider metrics. Of particular importance are the increased prominence of data communications in all its forms, and the effect of that trend on service providers' revenues. Also, with several new entrants having been acquired by incumbents, the report analyzes the role that all competitors have in fulfilling the government's policy of promoting increased market competitiveness.

The report opens with a Market Overview that offers the reader a snapshot of the industry's services providers, their relative market share - nationally and provincially - and particularly, the growth of the new competitors. This is followed by an update on network deployment, noting the near ubiquity of LTE, and the resulting unprecedented growth in data traffic. Also included is a summary of subscriber and revenue growth, the decline in prepaid and resale, along with changes to the associated metrics and the effect of new accounting rules. We have also noted some of the issues surrounding spectrum auctions and the pending deployment of 5G.

This is followed by a detailed examination of recent CRTC and ISED policies, decisions and reviews affecting the mobile wireless industry and a discussion on important spectral and technological developments as the 5G era approaches.

The next two sections contain concise, yet detailed, profiles of nine wireless service providers including their revenue & subscriber metrics, marketing & sales activities, competitive tactics as well as predictions for future performance.

The final section contains 10 comprehensive Exhibits that illustrate service provider-specific data including projections to 2022 for subscriber and revenue growth including ARPU & ABPU, provincial analysis, segmentation between business & consumer accounts and prepaid & postpaid accounts, a breakdown between voice & data revenues, COA, churn, and detail on SMS and data traffic.