

CANADIAN
MOBILE WIRELESS COMMUNICATIONS
SERVICES MARKET REPORT



2015 EDITION

NBI / MICHAEL SONE
ASSOCIATES INC.

www.nbicanada.com

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About this Report

Having published this report for over 20 years, NBI/Michael Sone Associates' **Canadian Mobile Wireless Communications Services Market Report, 2015 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 is the increased prominence of data communications in all its forms, and the effect of that trend on service providers' revenues. Also, with two of the five new entrants having been acquired by an incumbent, the report analyzed the role the remaining new entrants still 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 relevant issues, specifically the service providers' subscriber and revenue performance, market share, penetration and future direction as indicated by the key metrics of their subscriber acquisition and growth, segmented voice & data ARPU, usage rates and churn. It also examines the current state of the industry, its competitiveness in the wake of the failure/acquisition of two new entrants, the impact of the CRTC's Wireless Code of Conduct and the growth in data consumption driven by the near-ubiquitous adoption of smartphones. The issue of wholesale rat regulation and its impact on an MVNO/reseller market is also discussed.

The next two sections contain concise, yet detailed, profiles of the wireless service providers including their recent market performance and activities as well as predictions for

the future. Also included are forecasts of subscriber and revenue growth and the increasing role to be played by all forms of mobile data in in that regard.

Nine comprehensive Exhibits illustrate service provider-specific data including projections to 2018 for subscriber and revenue growth, provincial analysis, segmentation between business & consumer accounts, breakdown between voice & data revenues, COA and churn metrics, and detail on SMS and total data traffic.

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