

CANADIAN  
MOBILE WIRELESS COMMUNICATIONS  
SERVICES MARKET REPORT



2011 EDITION

NBI / MICHAEL SONE  
ASSOCIATES INC.

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**CANADIAN MOBILE WIRELESS**  
**COMMUNICATIONS SERVICES**  
**MARKET REPORT**

**2011 EDITION**

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## **About this Report**

With previous editions of this report going back over 16 years, NBI/Michael Sone Associates' **Canadian Mobile Wireless Communications Services Market Report, 2011 Edition** continues to be the most comprehensive, independent study published on this industry.

It examines the mobile wireless, messaging, data and video market in Canada, focusing on both services currently offered and probable future developments of the industry. Of particular importance is the diminishing value of voice in favour of data communication in all its forms and the effect of that trend on service providers' revenues. Also, with four new entrants now well established, the report affords itself the opportunity to review their service offerings and network coverage and examine the extent these companies have had in fulfilling the promise of increased market competitiveness.

The report opens with an Executive Summary that offers the reader a snapshot of the industry's relevant issues, specifically the service providers' performance, market share, penetration and future direction as indicated by the key metrics of their subscriber acquisition and growth, ARPU, usage rates and churn.

Thereafter are two sections that contain detailed profiles of the incumbent and new entrant wireless service providers respectively, their recent market performance and activities as well as predictions for the future. The profiles include a short description of the company and a discussion on the deployment of their infrastructure and technologies that support advanced data applications (some of which qualify for wireline replacement). This is followed by an examination of plans for voice, messaging, data and other value-added services, as well as analysis of distribution channels, revenue dynamics, subscriber growth, usage patterns and acquisition costs. 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 2014 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 traffic and revenues.

Please watch for our upcoming **Canadian Mobile Wireless Communications Device Market Report, 2011/12 Edition.**

**A Note on Accuracy**

The accuracy of the information in this report cannot be guaranteed. The information contained herein is the most recent available at the time of writing, but is subject to change. Statistics and comments on specific companies should not be construed as official statements from those companies. Rather, such information represents the opinions and estimates of NBI/Michael Sone Associates. We will be pleased to publish any demonstrably and significantly more accurate information supplied to us.

As always, NBI/Michael Sone Associates welcomes comments on this report and suggestions for future editions. Please call us anytime at 416-360-0424 or e-mail us at [msone@nbicanada.com](mailto:msone@nbicanada.com).